



Managely Release Notes

October 2026

Version 5.3.76

MANAGELY®

Contents

Enhancements2

 Setup > Company2

 Search Functionality on Main Search Bar can now Exclude Terminated Customers [00168358, 00170400, 00168987]2

 CRM > Customers3

 RMR Tab Grid now has Resizable Columns [00166811]3

 Added Field Label for “State” on Sites Page [00169466]3

Application Corrections4

 Tried to upload a 1 page PDF to create a template and the screen did not change for 10 minutes, closed out [00166812]4

 Auto pay month is off by one month for recurrings generated in advance [00170656]4

 Integrity check showed unbalanced invoices [00170672]4

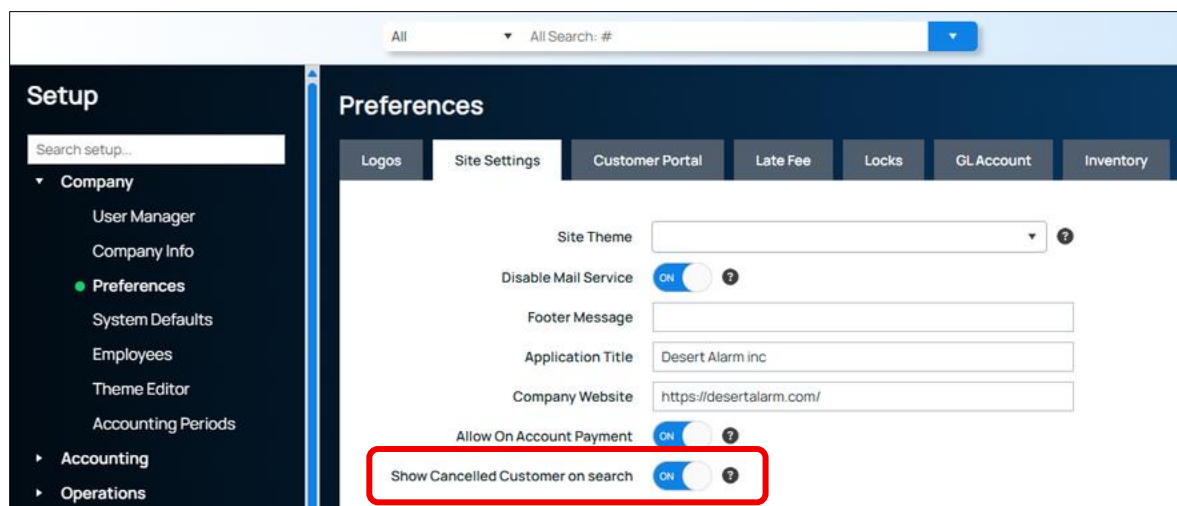
 YTD detailed sales report times out and takes hours to download [00170743]5

Enhancements

Setup > Company

Search Functionality on Main Search Bar can now Exclude Terminated Customers [00168358, 00170400, 00168987]

The main search bar includes terminated customers. This can lead to user confusion and fill the search results with potentially unwanted search results. To accommodate users who want to exclude terminated customers as well as users who want to include terminated customers, we added a new setting on the company preferences (Setup > Company > Preferences > Site Settings tab): Show Cancelled Customer on Search. If this switch is set to YES, the main search bar will include terminated customers. If this switch is set to NO, the main search bar will exclude terminated customers.



(For either setting, users can see a list of only terminated customers on the customer list page (CRM > Customers) by setting the Terminated Customers switch to YES.)

CRM > Customers

RMR Tab Grid now has Resizable Columns [00166811]

Users can now resize the grid columns on the RMR tab on the customer detail page (CRM > Customers > Customer # hyperlink > RMR Tab). Previously the columns could not be resized. This is helpful for any columns where the information is not fully visible.

Invoices	Credits	Credits Approval	Sites/Systems	Contracts	RMR	Work Orders	Bill To Information	Proposals	Payments	CC/eCheck	Notes	Contacts	Doc
22	1	0	5/2	2	9	16	1	10	40	36	1	0	

Generate Recurring Invoice

New RMR

		RMR #	Item Code	Description	Billing Cycle	RMR Cycle Start Date	Cancellation Date	Quantity	Monthly Amount	Cycle Amount
--	--	-------	-----------	-------------	---------------	----------------------	-------------------	----------	----------------	--------------

(Note: For users who are familiar with the Bold Group AlarmBiller product, this now functions the same as in AlarmBiller.)

Added Field Label for “State” on Sites Page [00169466]

The State field on the customer Site edit page (CRM > Customers > Customer # hyperlink > Sites/Systems tab) was unlabeled. Users were skipping this field during data entry, which caused incomplete address records.

We added the label for the State field, so users know what the field is to enter a value to complete the address.

Use Customer Address
☐ OFF

Site Name

AaronRentSiteThree

Address

5200 Broad Street

Address 2

City

Cleveland

State

Ohio

Zip

44126

Plus4

Timezone

Phone

(888) 555-7777

ext.

Email

aaronstethree@boldgroup.com

Site Number

AaronRentSiteThree

Sales Tax

OHFRACOL -10%

Application Corrections

Tried to upload a 1 page PDF to create a template and the screen did not change for 10 minutes, closed out [00166812]

We fixed this issue. In addition, when a PDF file had not been uploaded or its page images were unavailable, Managely displayed an incorrect message. Managely now shows the correct messages: "This form instance is not available" and "The PDF background images for this form could not be found."

Auto pay month is off by one month for recurrings generated in advance [00170656]

Users generated recurring invoices on 9/25 with a RMR Next Invoice Date of 10/1 and invoice date of 10/1. The next cc/check funding date should be 10/1 (which is "next month" in the System Defaults) for all customers who have a hold date of 1, but the auto pay date was 11/1 a month out.

We corrected this so Managely calculates the funding date from the process date. For customers to be charged on the 1st of the invoice month (10/1 in this example), users should set the **CC/eChecks Funding Month** field to Current Month. This is in Setup > Company > System Defaults.

System Defaults

Next Customer Number	4717
Next Invoice Number	81
Next Vendor Number	3099
Next Purchase Order Number	1487
Accounting Open Date	1/1/1970
Fiscal Year Starts	1/1/2027
Labor Warranty	Labor - 1 Year
Part Warranty	Labor - 1 Year
Service Level	Time and Material - Commercial
Work Order Type	Service Call (comm)
Invoice Delivery	Print
New Work Order Status	Open
CC/eChecks Funding Month	Current Month

Integrity check showed unbalanced invoices [00170672]

Several GL entries were showing out of balance in the integrity check.

The out-of-balance invoices from the integrity check had three separate causes

1. Part kit rounding: a kit's parts do not add up to the kit price, and the kit has no GL account, so the part credits do not equal the AR debit. We fixed this so that part kit adjustments scale each kit's parts in proportion. Any leftover rounding cent goes on the largest part. WIP and accrued WIP invoices were fixed in the same way. Each part still posts to its own GL account, and the invoice lines are not modified.
2. Invoice edits saved the new header totals but dropped the line changes. This was a data fix.
3. A line was removed from the work order after invoicing, and the header and tax kept the old total. This was a data fix.

YTD detailed sales report times out and takes hours to download [00170743]

Running a large report, such as the Year-to-Date Detailed Sales report for a full calendar year, could take hours to produce or stop with a timeout error partway through and never finish. This blocked users who needed their sales reports, including the cash-based sales report.

This issue was caused because every page of a report printed the company logo in the header. Managely loaded the company's original, full-size logo file, and processed it again on every page. When a report ran to hundreds of pages, that repeated work added up to a long run time. The long run time caused the timeout.

Managely now shrinks the logo once, to the size it appears on the report, and reuses that smaller version on every page. Printed report looks the same, but each page takes far less work. Long reports should now finish in a reasonable time instead of timing out. This improvement applies to all reports that print the company logo.