Managely Release Notes

June 2025

Version 5.3.51

MANAGELY®

Contents

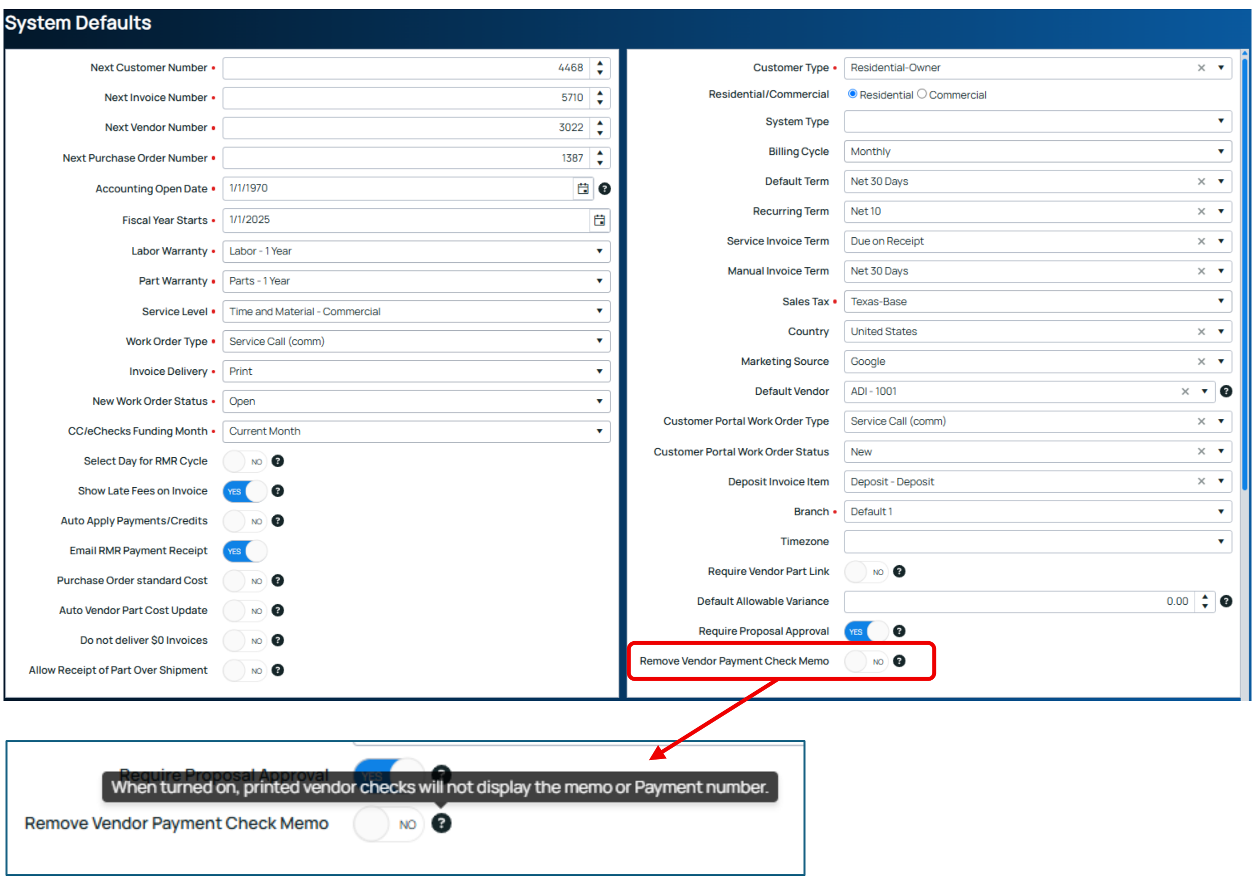
Enhancements

Important! We made a change to templates that will require users to Sync Stock templates. Details are in this correction: [Pricing information is not moving down on eForms when using print preview on the work order template [00138196]].

Setup > Company

Option to Hide Memo and Payment Number from Vendor Checks [00137731]

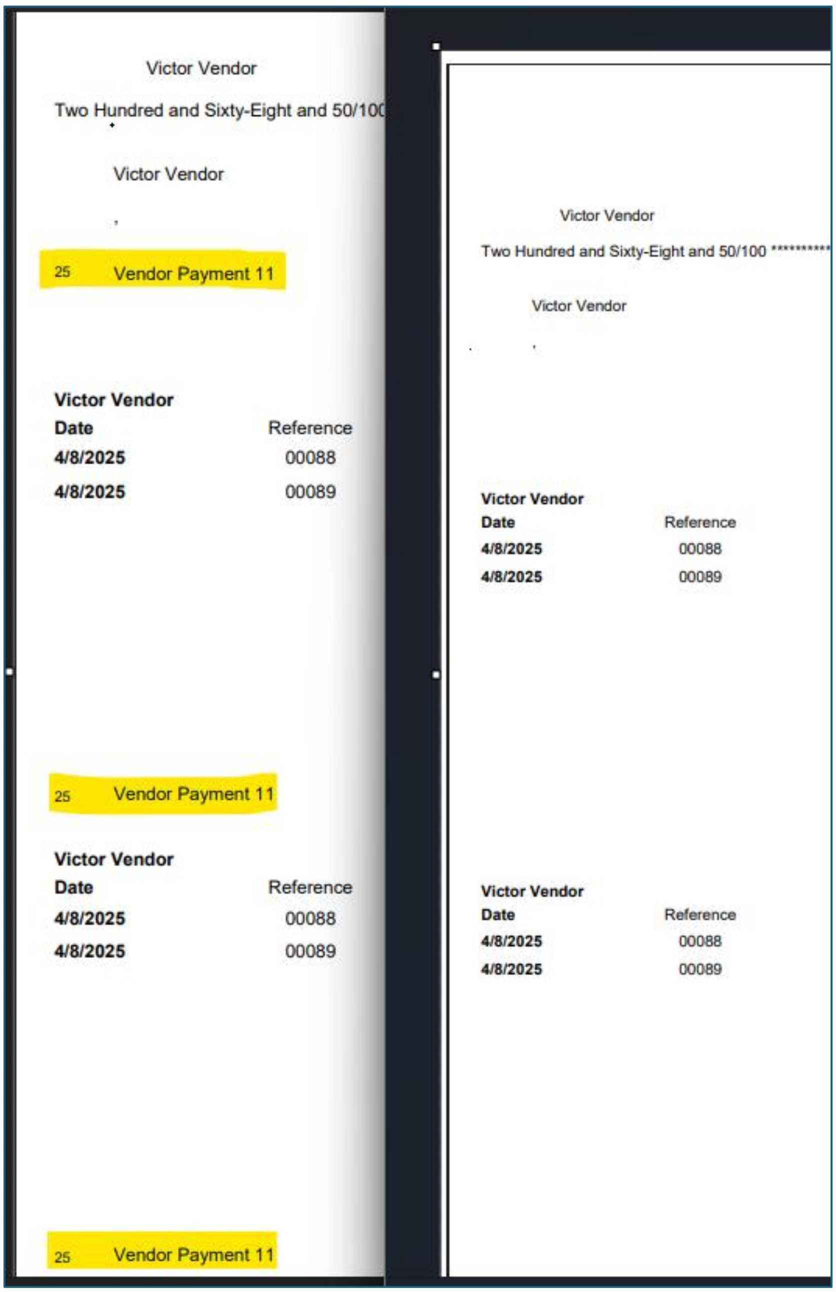
On the System Defaults page (Setup > Company > System Defaults), we added a switch called **Remove Vendor Payment Check Memo**.



If this switch is set to YES, printed vendor checks (Accounts Payable > Payments > select check # > click Print in top right) will hide the memo and payment number.

If this switch is set to NO, printed vendor checks include the memo and payment number. The default for this switch is NO.

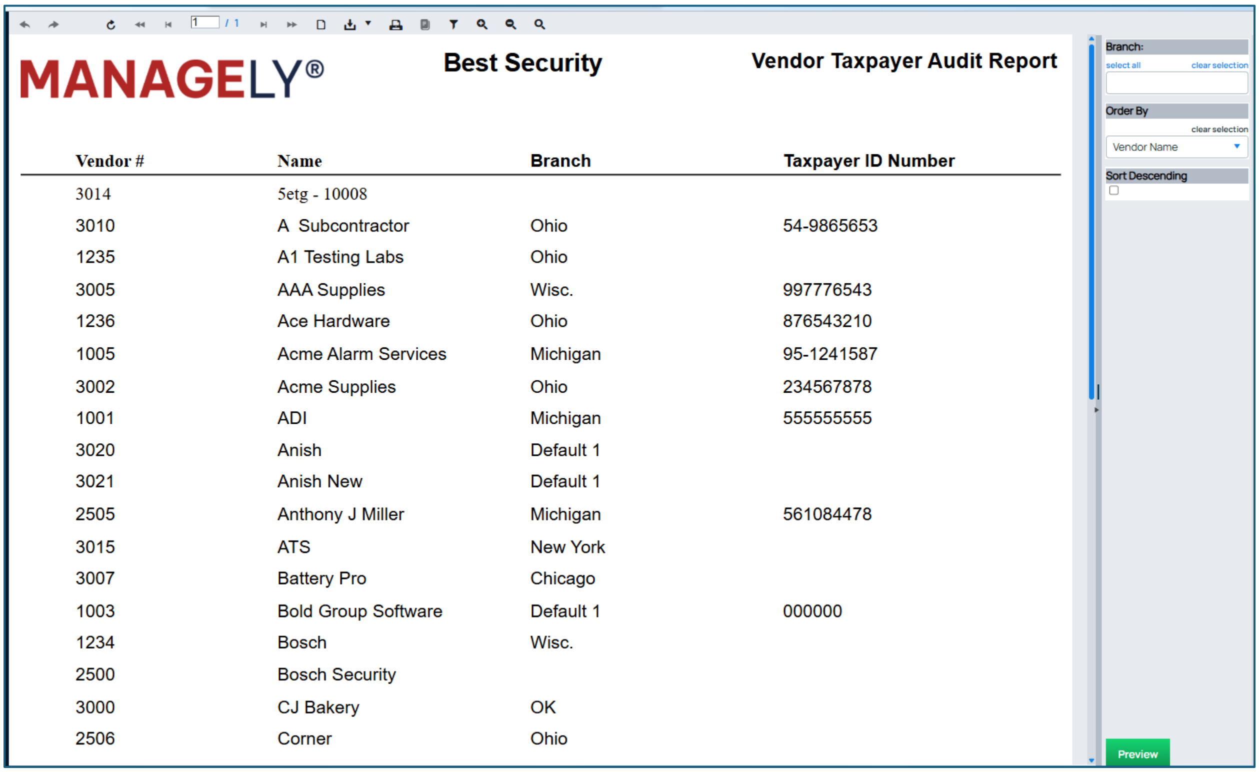
In the example image below, the left side shows a printed check when the **Remove Vendor Payment Check Memo** switch is set to NO, which prints the payment number and memo, and the right side shows a printed check when the **Remove Vendor Payment Check Memo** switch is set to YES, which hides the payment number and memo:



Reports > Accounts Payable

New Report to Export a List of all Vendor Taxpayer ID Numbers [00133633]

We added a new report called Vendor Taxpayer Audit Report (Reports > Accounts Payable > Vendor Taxpayer Audit Report). This report lists all vendor taxpayer ID numbers to use for audits and other purposes.



Vendor #	Name	Branch	Taxpayer ID Number
3014	5etg - 10008		
3010	A Subcontractor	Ohio	54-9865653
1235	A1 Testing Labs	Ohio	
3005	AAA Supplies	Wisc.	997776543
1236	Ace Hardware	Ohio	876543210
1005	Acme Alarm Services	Michigan	95-1241587
3002	Acme Supplies	Ohio	234567878
1001	ADI	Michigan	555555555
3020	Anish	Default 1	
3021	Anish New	Default 1	
2505	Anthony J Miller	Michigan	561084478
3015	ATS	New York	
3007	Battery Pro	Chicago	
1003	Bold Group Software	Default 1	000000
1234	Bosch	Wisc.	
2500	Bosch Security		
3000	CJ Bakery	OK	
2506	Corner	Ohio	

Users can select individual branches or all branches for the report.

This has an **Order By** sort for vendor number, vendor name, or branch.

The **Vendor #** is a link that opens the vendor detail page.

There is a **Sort Descending** option to order by the name in descending order.

GL > Bank Accounts

Amount Column Right Justified on Reconcile Account Page [00138933]

On the Reconcile Account page (GL > Bank Accounts > Bank Name hyperlink > Reconciliation tab > Ending Date hyperlink), we changed the alignment of the Amount column in the grid. Now the column is right justified to help readability.

Amount
$100.00
$100.00
$2.00
$2.00
$1,500.00
$5,000.00
$5.00
$33.85

Application Corrections

Pricing information is not moving down on eForms when using print preview on the work order template [00138196]

Note: To see these changes, click the Sync Stock Templates button (Templates & Forms > Templates).

We updated the default work order template to fix the display issues. Now the Pricing Information and Totals are displayed above the Notes table correctly.

Move customer to new queue [134922]

Manually moving a customer to a new queue was not working.

If a customer did not have an aging bucket, they could not be moved from one collection queue to another. We changed this, so if an aging bucket does not exist, the customer can be moved to another collection queue.

RMR invoice delivery issue [136372]

A customer did not receive an RMR invoice as expected. The Setup > Utilities > Mail/Email Summary > Outgoing Email tab did not have customer email addresses in some columns as expected.

We resolved this issue so when synchronizing the email statuses, users will only get updates for emails with the dealer id and prefix. (Note: This will not bulk update any email sent before this change; however, the individual refresh will work.)

Customers added to collections queue disappear [00136343]

We resolved an issue with the collections queue where users could not add customers to the queue or would add customers to the collections queue, but the added customers would later disappear from the queue.

Cannot edit system info due to requirement for unique system numbers [00137790]

In an earlier version of Managely, the requirements for the system number field were changed so that the system number had to be unique. This posed a problem when importing data for new customers.

We changed the requirements for the system number: different sites on a customer can now have the same system numbers. However, systems under the same site must have unique system numbers.

Font adjustments, bolding, bugs... [138037]

On templates, there was a difference between design and preview: any font / bolding etc. changed in design did not reflect in preview.

We made changes to retain formatting tags for bold and italics. (Note: These font families provided within the editor do not support italic styling: Impact, Lucida, Tahoma, and Times New Roman.)

Duplicate credit card payment without transaction details [138966]

When creating a stand-alone credit card payment for a customer not associated with an invoice, there was an error with the payment not being linked to the Forte transaction. Once Forte approved the transaction, a new payment would be created attached to the Forte transaction, causing double payment records (with double GL) for the single Forte transaction. This caused only a single charge to the customer, but double aPayment records.

We fixed this issue.