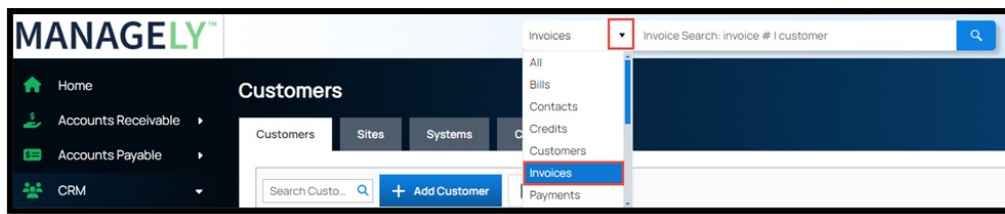


Managely – Multiple Ways of looking up an Invoice

10/24/2024 3:45 pm EDT

There are multiple ways of looking up an invoice in Managely by Invoice number.

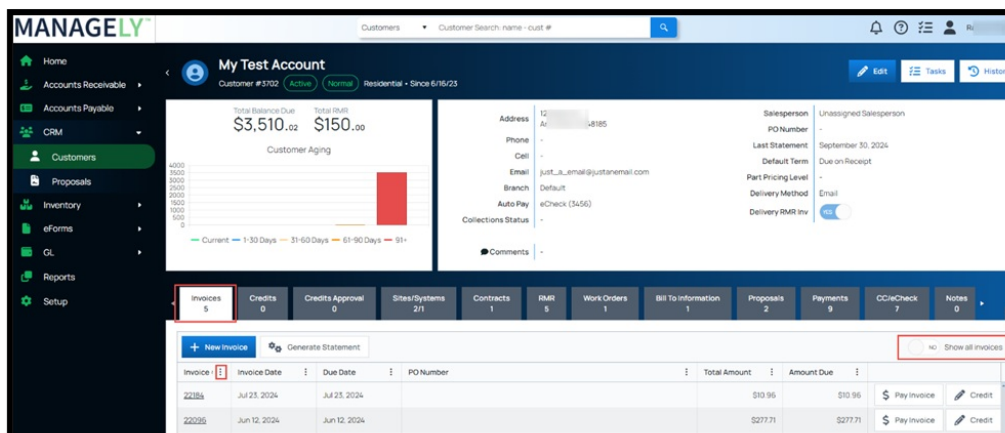
1. Switch the search criteria from the top drop-down from customers to invoices (then type the invoice number and the Enter key):



2. From the customer page under Invoices tab.

a. If the invoice is paid or \$0.00, the 'Show All Invoices' toggle needs to be enabled.

b. The filter option (three vertical dots) can be used to filter for exact invoice number.



3. From the invoices tab (type the invoice number and then click the filter button):

MANAGELY™

CustomersCustomer Search: name - cust #

Q

Home

Accounts Receivable

Invoices

Payments

RMR

Work Orders

Calendar

Collections

Accounts Payable

CRM

Inventory

eForms

GL

Reports

Invoices

InvoicesCreditsCredits Approval QueueInvoices/Credits Not DeliveredPrinted Batch History

Export to Excel

Drag a column header and drop it here to group by that column

Invoice #	Customer Name	Branch	Delivery Status	Invoice Date
22305	↑ Sort Ascending ↓ Sort Descending	TST	Printed	Mar 1, 2025
22313	Columns		Not Delivered	Oct 9, 2024
22312	Filter		Not Delivered	Oct 9, 2024
22311	Contains		Not Delivered	Oct 7, 2024
22310	And		Not Delivered	Oct 7, 2024
22309	Contains		Not Delivered	Oct 7, 2024
22308	ClearFilter		Not Delivered	Oct 3, 2024
22293			Not Delivered	Oct 1, 2024

If the invoice has been paid, the toggle for 'Show All Invoices' needs to be enabled:

MANAGELY™

CustomersCustomer Search: name - cust #

Q

Process Deferred

Home

Accounts Receivable

Invoices

Payments

RMR

Invoices

InvoicesCreditsCredits Approval QueueInvoices/Credits Not DeliveredPrinted Batch History

Export to Excel

Show all invoices

Drag a column header and drop it here to group by that column