

Managely – How to manually send or resend a payment receipt

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Managely gives its users the ability to manually send or resend a payment receipt via email.

Different scenarios may call for a redelivery of the payment receipt. (Customer states that they didn't receive it initially, cannot find it any longer, better book-keeping, reorganizing the emails in certain folders based on filters, deleting the initial email, etc.)

To (re)deliver a payment receipt, simply access the payments tab on the customer's account.

All the way to the right-hand side, the option for receipt will be visible.

Once the Receipt button has been pressed, a pop-up will appear and give the user the chance to type in the desired email address where the payment receipt will be sent.

The screenshot displays the Managely interface for a customer account. The top section shows account details like 'Total Balance Due' (\$3,547.06) and 'Total Paid' (\$150.00). Below this is a 'Customer Aging' chart. The main area is divided into tabs: Invoices, Credits, Credits Approval, Information, Proposals, Payments (highlighted with a red box), COA/Check, and Notes. A table of payments is shown below the tabs, with columns for Payment #, Payment, Deposit, Check Num, Payment Met, Amount, Unapplied, Settled, and Receipt. The 'Receipt' column contains icons for each payment, with a red box highlighting one of them. A pop-up window titled 'Email Payment Receipt' is open, featuring an 'Email Address' input field and buttons for 'Download/Print', 'Email', and 'Cancel'.

Payment #	Payment	Deposit	Check Num	Payment Met	Amount	Unapplied	Settled	Receipt
11255	Nov 6, 2024	11280	143	Check	(\$10.00)	\$0.00	NO	Receipt
11252	Jun 18, 2024	11228	9999998	Check	\$10.00	\$0.00	NO	Receipt
11253	Jun 11, 2024	11226		Credit Card	\$125.00	\$0.00	NO	Receipt
11254	Jun 11, 2024	11226		Credit Card	\$25.00	\$0.00	NO	Receipt