Managely Training Agenda

BOLD GROUP

Welcome to Managely Training! We're excited to showcase the Managely application and have you become an expert in the software. Training will be conducted in 2-4 hour time increments. All training will be recorded and sent to you for future use. Topics, features discussed within the topics and estimated times are below.

Setup Training

Company	• User Manager and Employees • Company info and Preferences • Cancellations • Systems Defaults	2-4 Hours
Accounting	• Accounting Periods • Sales Tax • Chart of Accounts • Branches • Categories • Aging Buckets and Statements	2-4 Hours
Operations	• Work Order Configuration • Work Order Tasks • Service Levels and Warranty • Contracts • Credit Approvals • Expenses	2-3 Hours
Items and Parts	• Item and Part Configuration • Part Kits • Pricing Levels • Part Types and Manufacturers	1 Hour
Utilities, Uploaders and Exports	• eCheck / Credit Card Setup • Automation CC/ACH, Statements • Managing System Locks • Customer System Templates (Invoices, Credit, Statement, WO) • Batch Uploaders	2-3 Hours
Proposals (Not required if utilizing WeSuite)	• Entering Vendors • Entering Bills • Selecting Bills for Payment • Printing A/P Checks • Recurring Bills & Checks • Check Stock • Purchase Orders	3 Hours
Other	• Exports • Task Management • Customer, System, Document Types • RMR Grouping	2 Hours

eForms	• eForms Template • PDF Back Back vs. WYSWIG Setup • Proposal Templates	2-3 Hours

Application Training

Customer Management	• New Customer Creation • Manage Customer Info: Customer, Site, System, Contacts, Bill Tos, Credit Card/ACH, RMR • Cancellations • Master Account Management	2 Hours
Accounts Receivable	• Recurring Billing and Payment Processing • Miscellaneous Invoices • Payments • Credits • Statements • Email, Mail, Printing Invoices • Unapplied Cash & Credits • Collections	3 Hours
Inventory	• Inventory Part Creation • Parts Explorer Functions • Warehouses • Issues and Returns • Physicals • RMA • Part Kits	2 Hours
Work Orders	• Work Order Queue and general ticket navigation • Creating a Ticket (Service, Recurring, Installs, etc.) • Printing Service Tickets • Schedule a Technician • Technician Dispatching • Invoicing and Deposit Options • Resolution, Invoice, and Closing Ticket • Recurring Ticket Generation • Appointment Based Recurring Tickets • Change Orders • WO Pos • Receiving Parts • Task Management	3 Hours
Accounts Payable	• Entering Vendors • Entering Bills • Selecting Bills for Payment • Printing A/P Checks • Recurring Bills & Checks • Check Stock • Purchase Orders	3 Hours

General Ledger	• Accounting Periods • Account Register • Journal Entries • Deferred Income Recognition • Closing Accounting Period	1 Hour
Proposals and eForms (Not Applicable if using WeSuite Integration)	• Proposal Creation and Queue Management • Charges Tab • eForms customer proposal template • eForms Template PDF Overlay • Proposal creation and eForm delivery lifecycle • Converting Proposal to Work Order	2 Hours

Sedona-X Mobile App Training (per session)	• General Navigation
	• **Customer**
	    o Searching, viewing, calling customers, accepting payments
	• Using CC swipers
	• Processing Go-Back and Resolved tickets
	• **Service Tickets**
	    o Searching
	    o Appointments
	    o Adding/editing/resolving
	    o Customer Signature
	• Scheduling Inspection Tickets and impact on Sedona-X Mobile App
	• Scheduling Jobs and impact on Sedona-X Mobile App
	• Inventory Setup and Impact on Sedona-X Mobile App
	• Calendar
		2 Hours/session