

How to Login

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A Bold Group technician will take care of installing your database prior to your Setup training class. The technician will provide your company with a URL for accessing your company's database, along with the Administrator password.

For companies that will not be converting data from a legacy system, once you login to Managely, you may populate all the necessary setup options, and then begin entering data into your company database.

For companies that will be converting data from a legacy system, two companies are setup at the time of installation. One company is named Sandbox where you can perform testing. The second company will be titled with the name of your company. This will be where all setup functions will be done. No transactions may be entered into this company until you are ready to go live on the software. This is referred to as your template company. When performing a data conversion, we will take a copy of your Template Company and fold in your live data into a conversion company for review and audit by your staff. Typically it takes three data conversions to go live on the software. With each data conversion a fresh copy of the Template Company is taken by your conversion technician, so if you have made any setup table changes between data conversions, these will be reflected in the next conversion.

When launching the application with your company's URL for the first time, the Managely Log In page is presented to the user. Login with the username Administrator, and enter the password provided by the Bold Group technician. Once you have logged in, you may setup individual user names and passwords for each of your employees who will be using the Managely application.

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