

Application Navigation

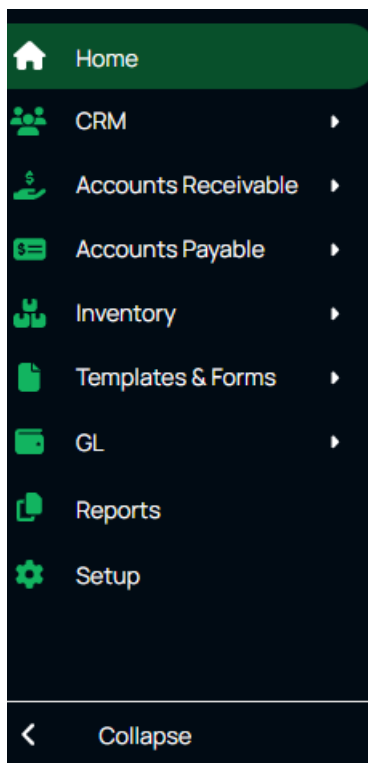
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The Managely Application

Once you log into Managely, you are presented with a main application menu on the left side of the page. Since each user is set up with particular user privileges, the application menu will only display the options for which your role has been granted permissions.

The application contains these modules: CRM, Accounts Receivable, Accounts Payable, Inventory, Templates & Forms, GL, Reports, and Setup. Clicking on the arrow at the right of the module shows the menu for that module. Each module has separate menus.

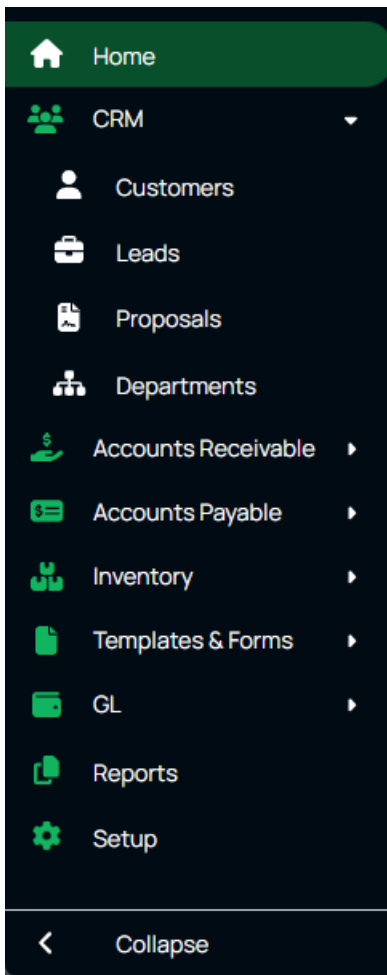
Information about each menu option, is covered under each module topic within this help knowledge base.



CRM

The CRM menu has options that are customer related:

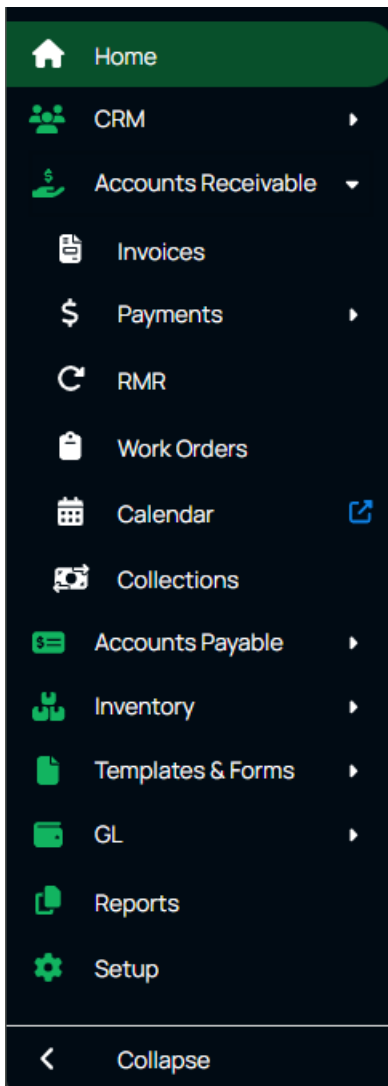
- Customers
- Leads
- Proposals
- Departments



Accounts Receivable Menu

The Accounts Receivable menu contains options that are related to receiving payment on accounts and work for accounts. These are the menu options:

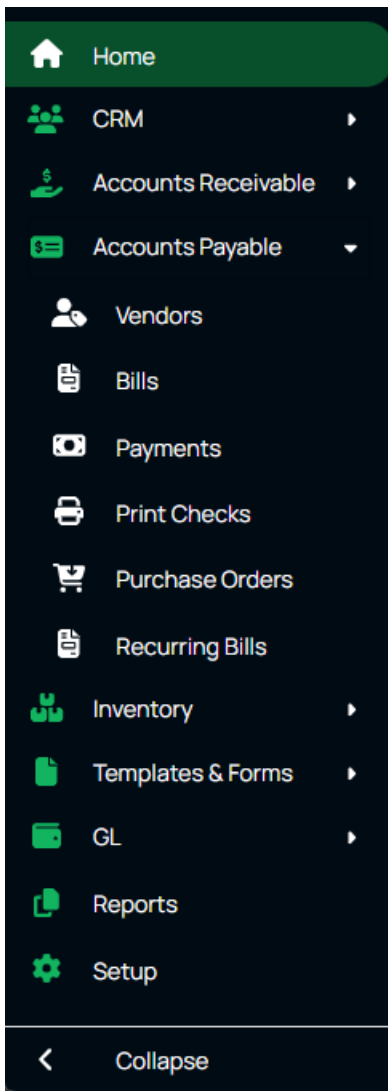
- Invoices
- Payments
- RMR
- Work Orders
- Proposals
- Calendar
- Collections



Accounts Payable Menu

The Accounts Payable menu contains options that are vendor related. These are the menu options:

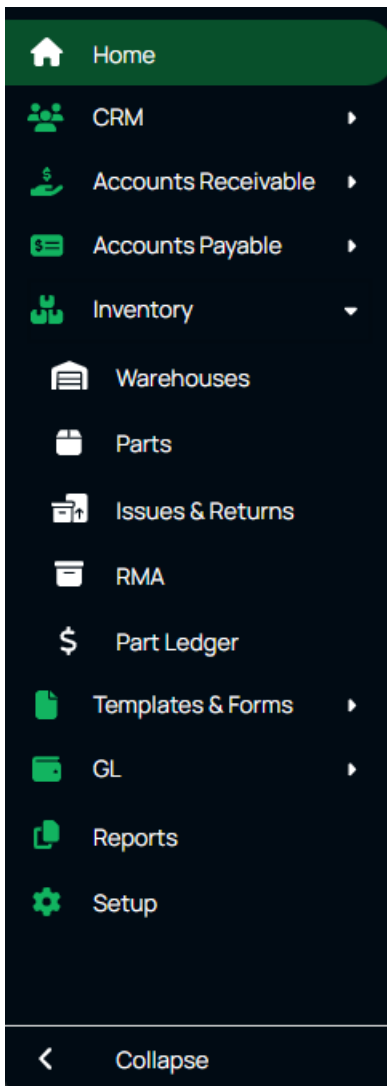
- Vendors
- Bills
- Payments
- Print Checks
- Purchase Orders
- Recurring Bills



Inventory Menu

The Inventory menu contains options that are parts related. These are the menu options:

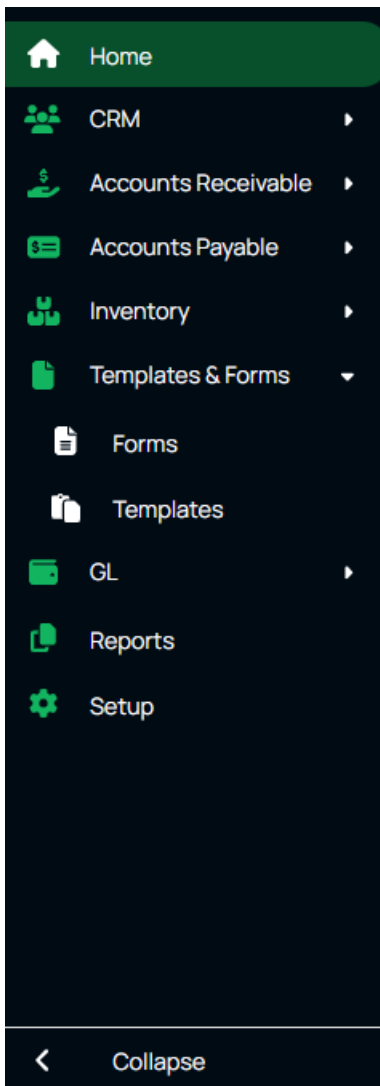
- Warehouses
- Parts
- Issues & Returns
- RMA
- Part Ledger



eForms Menu

The Templates & Forms menu contains options that are related to designing and maintaining eForms, which are used in the Proposals module and customer records. These are the menu options:


















- Forms
- Templates



GL (General Ledger)

The GL menu has options for ledgers, GL entries, accounting periods, bank accounts, chart or accounts, credit cards, and inter-branch queues. These are the menu options:

- GL Register
- Create Journal Entry
- Accounting Periods
- Bank Accounts
- Chart of Accounts
- Credit Cards
- Inter-Branch Queue

-  Home
 -  CRM ▶
 -  Accounts Receivable ▶
 -  Accounts Payable ▶
 -  Inventory ▶
 -  Templates & Forms ▶
 -  GL ▼
 -  GL Register +
 -  Create Journal Entry
 -  Accounting Periods
 -  Bank Accounts
 -  Chart of Accounts
 -  Credit Cards
 -  Inter-Branch Queue
 -  Reports
 -  Setup
-
-  Collapse