

Setup Overview

Last Modified on 07/22/2022 1:32 pm EDT

This Setup topic is designed for the new Managely customer. As a new customer, you need to familiarize yourself with the Managely application, its functions, purpose, and design structure. Like any system, the time you spend to learn the application, how properly to set it up, and understand how to operate the application, will allow you to gain the most benefits.

The setups provide the backbone of how the software will work for the company. Some setups are required where others are optional, depending on which functions of the software your company will be using. When initially setting up your company, if certain modules are not implemented, you may later on decide to implement un-used modules.

There is an old saying in the computer world, its GIGO – ‘Garbage-In Garbage-Out’. This is very important to understand when using any system. The result of any system like Managely is what you get out of it, financial reports, management reports, service analysis, revenue tracking, cancellation reporting, invoices and the ability to properly service your customers. In order to generate accurate, correct and timely data, it is important to understand the system requirements, how it is setup, and most importantly, how you are going to use and operate it within your business.

Setting up and using Managely will require your company to take a look at your business; use this as a time to re-evaluate your goals, and set in place the foundation so you may achieve them. It is not an easy task but well worth the investment of time.