Preferences

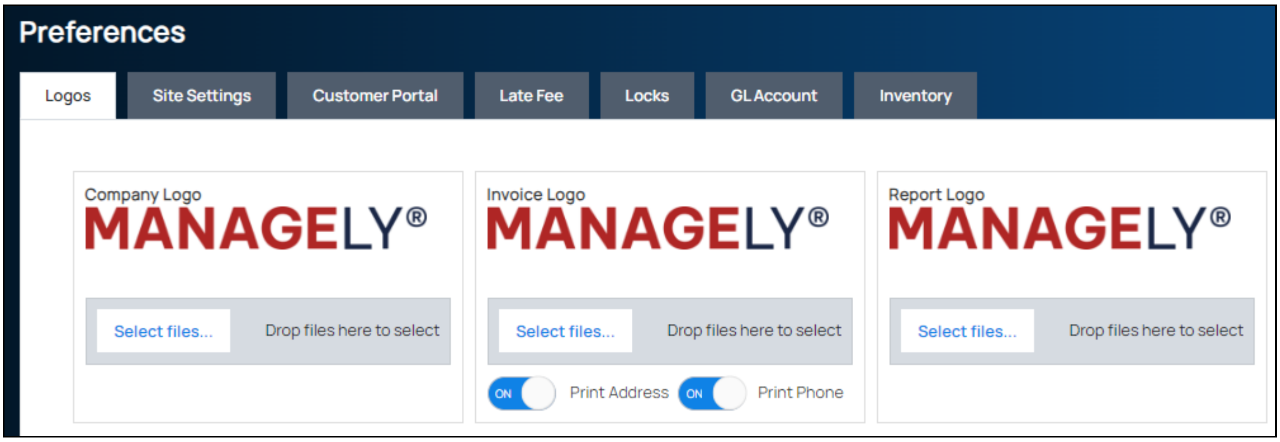
Last Modified on 06/24/2026 8:37 pm EDT

The Preferences page is comprised of seven separate tabs, which contain default information related to how Managely works for each company.

Logos

On the Logos tab, you can upload image files that are used for your company (the logo that appears at the upper left of the application), customer invoices, and reports.

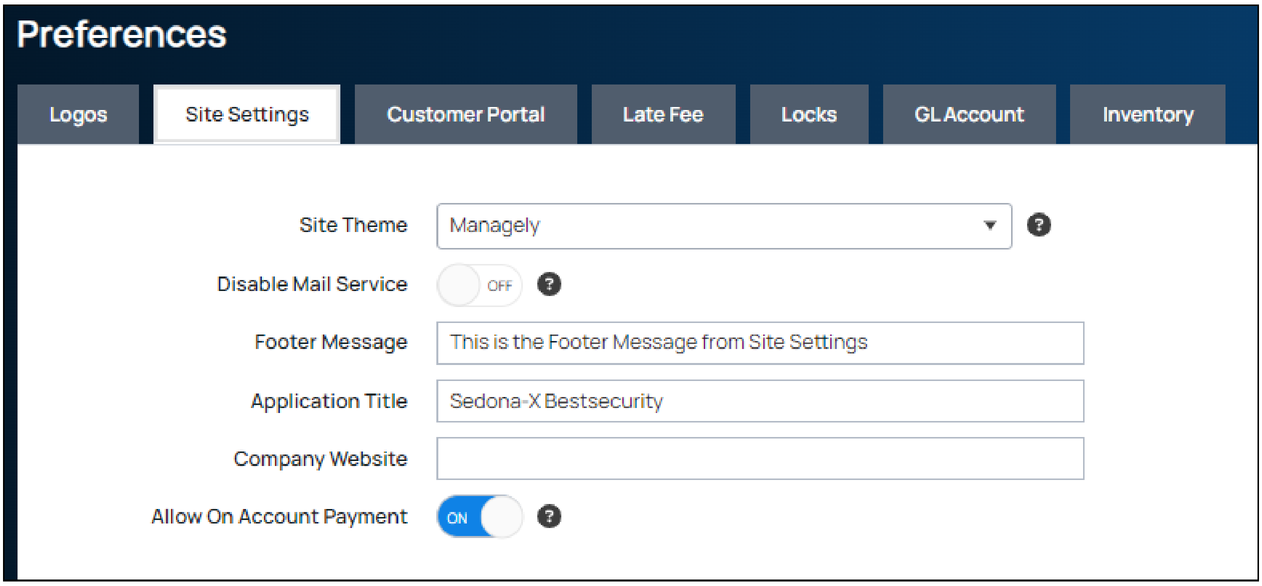
The maximum allowable size for each image file is 300 x 70 pixels.



Site Settings

The Site Settings control how the application looks.

Each data entry is described below.



- **Site Theme**: This controls the color scheme used by the software. This is the default for the company. When setting up users, you can change the Site Theme for individual users.

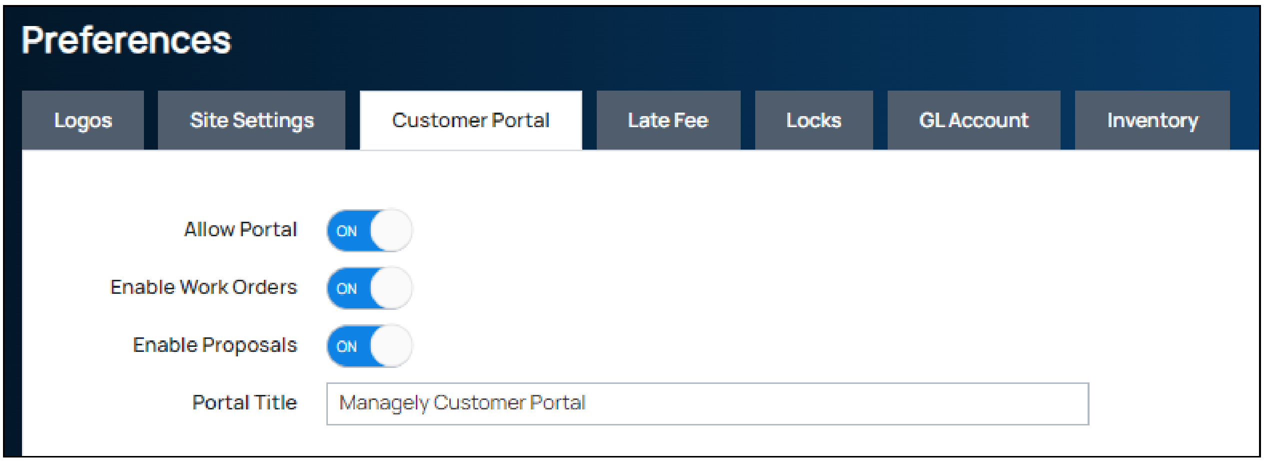
- **Disable Mail Service**: For companies that do not want to use our third-party provider, Sebis, to print and mail out invoices to your customers, set this switch to OFF. If this option is turned off, you will manually print and mail invoices to your customers.

  Note: If your company will be using Sebis, you will need to contact them directly to set up an account. Any services provided to your company by Sebis, are paid directly to Sebis by your company.

- **Footer Message**: Type a message for the footer of invoices.
- **Application Title**: Type a title to show on the application.
- **Company Website**: Enter your company's website (optional).
- **Allow On Account Payment**: This is an option for customers to pay on account (in addition to the pay by invoice option). This will be shown on the customer portal. To enable this option, set this switch to ON.
  - On the customer portal, a customer can choose to pay By Invoice or On Account.
  - When customers choose On Account and submit payments, they see a message: "Your payment has been received and will be applied to your invoices shortly."
  - When processing the payment, the payment amount is subtracted from the balance due amount.
  - Managely users can see the customer payment on the customer detail page (CRM > Customers > Customer # hyperlink) Payments tab.

Customer Portal

This tab has options related to allowing customers access to your company's customer portal. The Customer Portal, if activated, allows a company's customers to access their account information via a special URL provided.

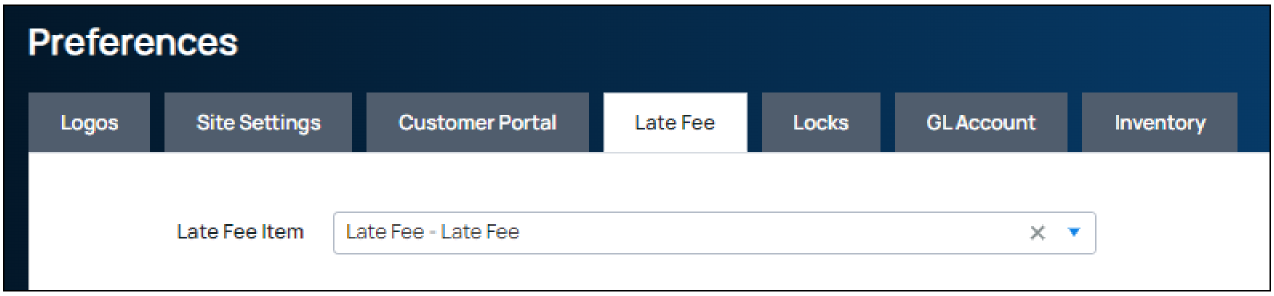


- **Allow Portal**: Switching the toggle to On allows your company's customers access to the Customer Portal.
- **Enable Work Orders**: For customers granted access to the Company Portal, users can access work order information.

- **Portal Title**: When a company's customer logs into the Customer Portal, this is the name of the company that appears.
- **Hide Logo**: This hides the Managely logo on the customer portal.

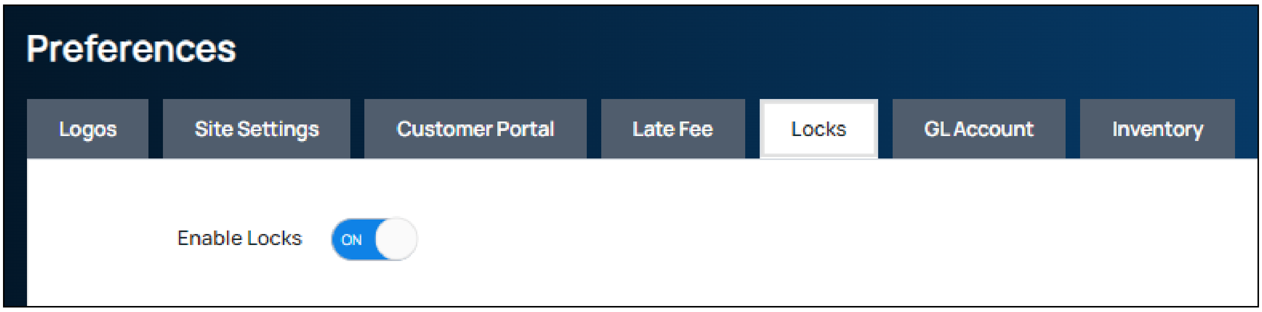
Late Fee

Select the item code to be used for posting a payment to the accrued late fees on a customer's account.



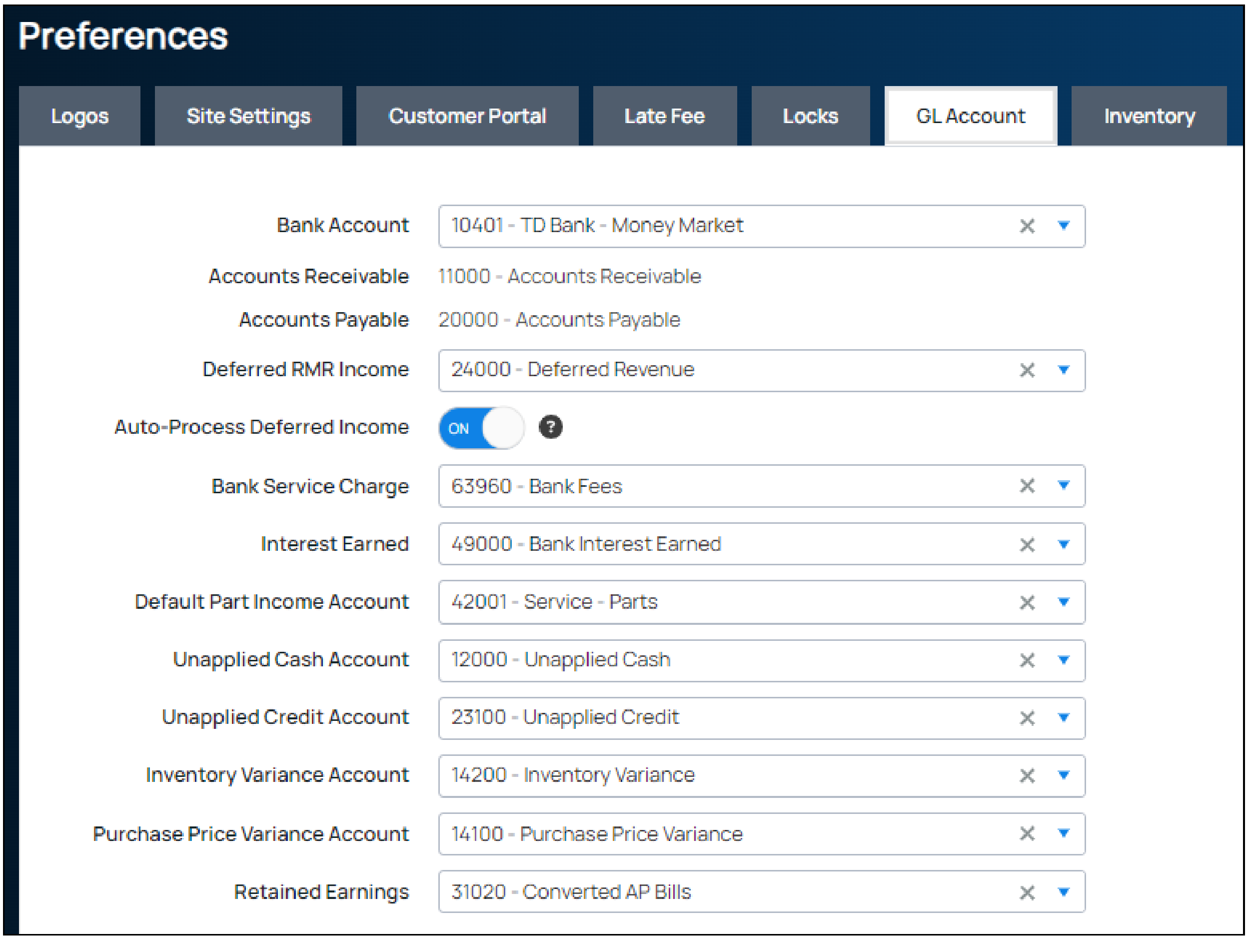
Locks

Enable Locks: Enables or disables record locking if more than one user accesses the same record at the same time (enabling helps preserve data integrity).



GL Accounts

Select G/L Accounts to use for various transactions performed within the software.

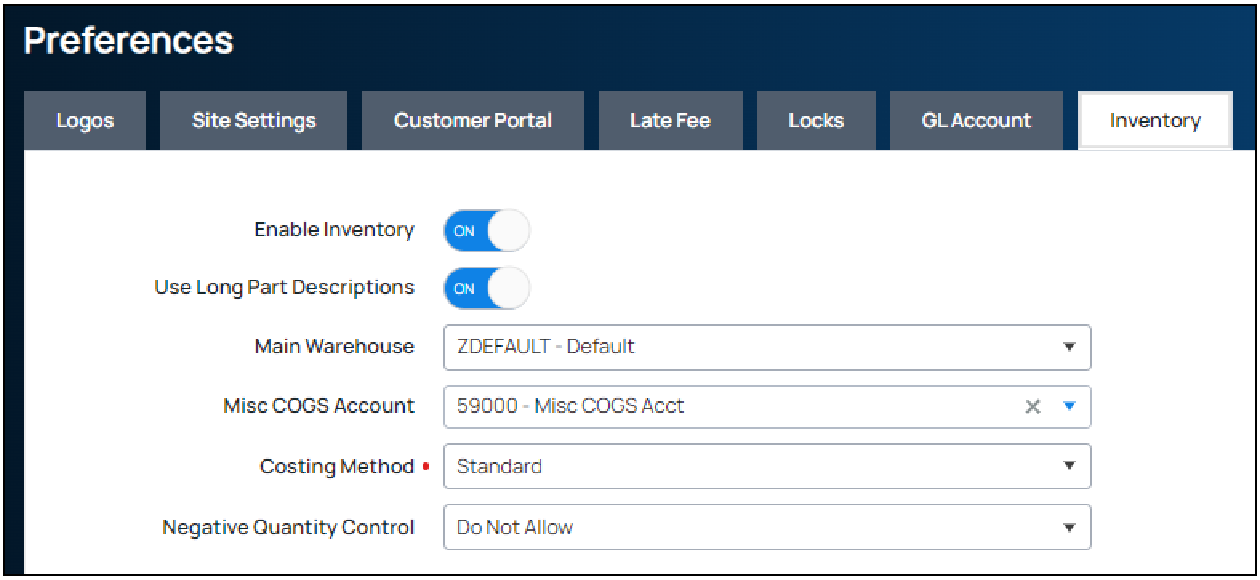


Data Entry Fields

- **Bank Account**: Select the G/L Account associated with the company's primary bank account.
- **Accounts Receivable**: This field is for future development.
- **Accounts Payable**: This field is for future development.
- **Deferred Income**: This is the default GL account used if a deferred income account is not specified. This list shows the GL accounts that have a liability account type.
- **Auto-Process Deferred Income**: Switch this to ON to automatically process deferred income GL entries. If this is OFF, you must manually process deferred income.
- **Bank Service Charge**: Select the G/L Account to use for posting a bank statement fee associated with a bank when performing a bank account reconciliation.
- **Interest Earned**: Select the G/L Account to use for posting interest earned on a bank account when performing a bank account reconciliation.
- **Default Part Income Account**: Select the G/L Account to use as the default cost of goods sold account when parts are sold on a manual customer invoice.
- Unapplied Cash Account:
- Unapplied Credit Account:
- Inventory Variance Account:
- Purchase Price Variance Account:
- Retained Earnings:

Inventory

Set defaults that control inventory-related information and transactions.



- **Enable Inventory**: If your company tracks on-hand quantities and amounts for your inventory parts, set this to ON.
- **Use Long Part Descriptions**: Switch to ON to enable and use long part descriptions when adding parts.
- **Main Warehouse**: From the drop-down list, select the primary warehouse for your company. Warehouses must first be created from Inventory > Warehouses.
- **Misc COGS Account**: Select the G/L Account to use as the default for the cost of parts when posting a manual customer invoice where parts are being sold.
- **Costing Method**: Select the costing method to use for inventory. Managely can use standard oraverage costing.
- **Negative Quantity Control** This is a Managely Pro feature. Choose what happens when a user initiates an action that pulls parts from a warehouse and causes the quantity of that part in the warehouse to drop below zero. This applies to work order invoices and to vendor credits.

  Allow: This allows users to process transactions without any warning messages about negative quantities.

  Allow With Warning: This gives users a popup message telling them that if they continue, the parts will have a negative quantity in the warehouse and asks if they wish to continue. If they choose yes, the transaction is completed. If they choose no, the transaction is stopped.

  Do Not Allow: This stops the transaction and gives users a popup message telling them that the part would have a negative quantity and asks them to adjust part quantities and try the transaction again.