Preferences

Last Modified on 11/01/2024 4:38 pm EDT

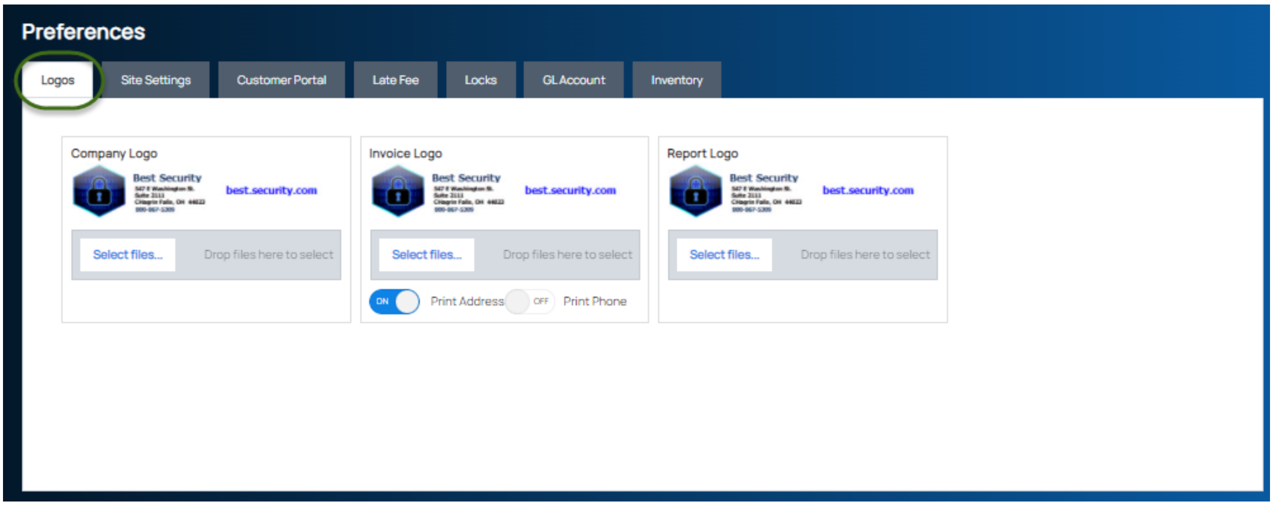
The Preferences section is comprised of seven separate tabs, which contain default information related to how Managely will work for each company.

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 px.

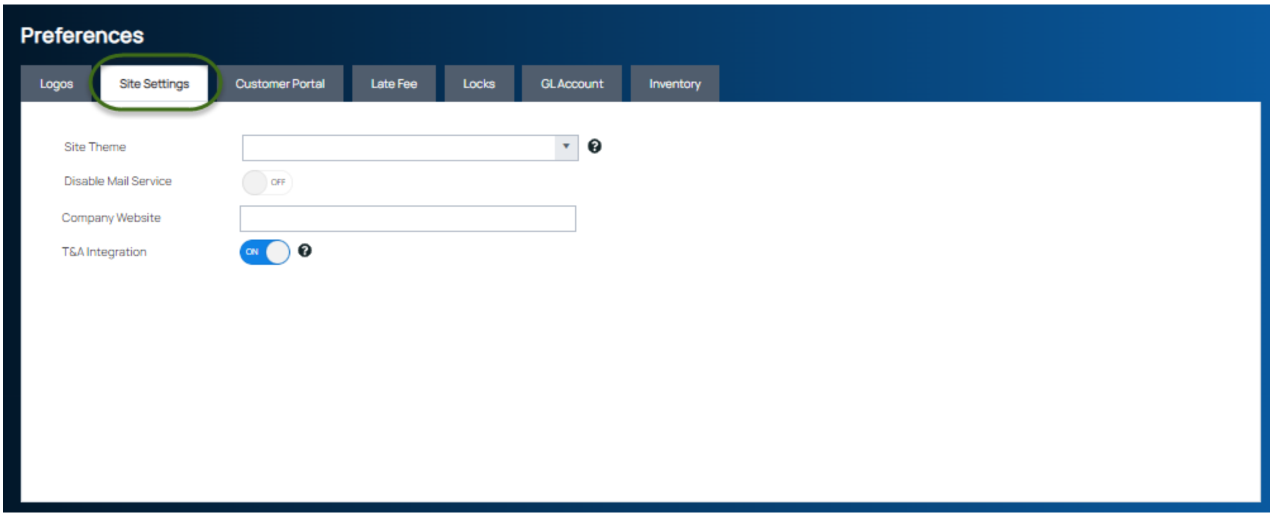
After uploading image files, click the Save button at the upper right.



Site Settings

The Site Settings control how the application will look and feel.

Each data entry is described below.



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

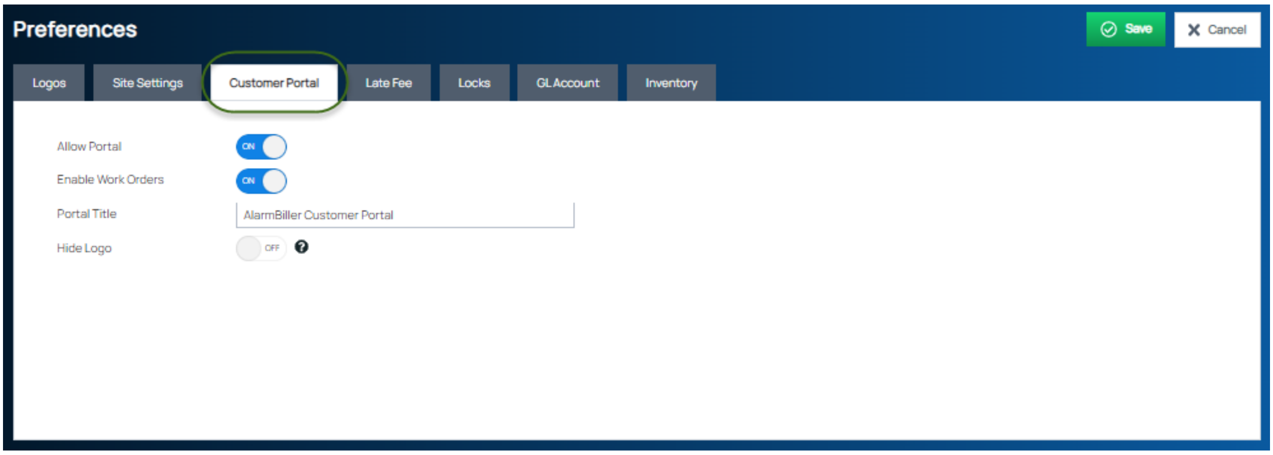
- **Disable Mail Service** — For companies that do not want to use our third-party provider, Sebis, to print and mail out invoices to your customers, select the Off option. If this option is turned off, you will manually print and mail invoices to your customers.

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.

- **Company Website** — Enter your company's website (optional).
- **T&A Integration** — If the company has purchased the Time & Attendance module, set the toggle to On, otherwise leave Off.

Customer Portal

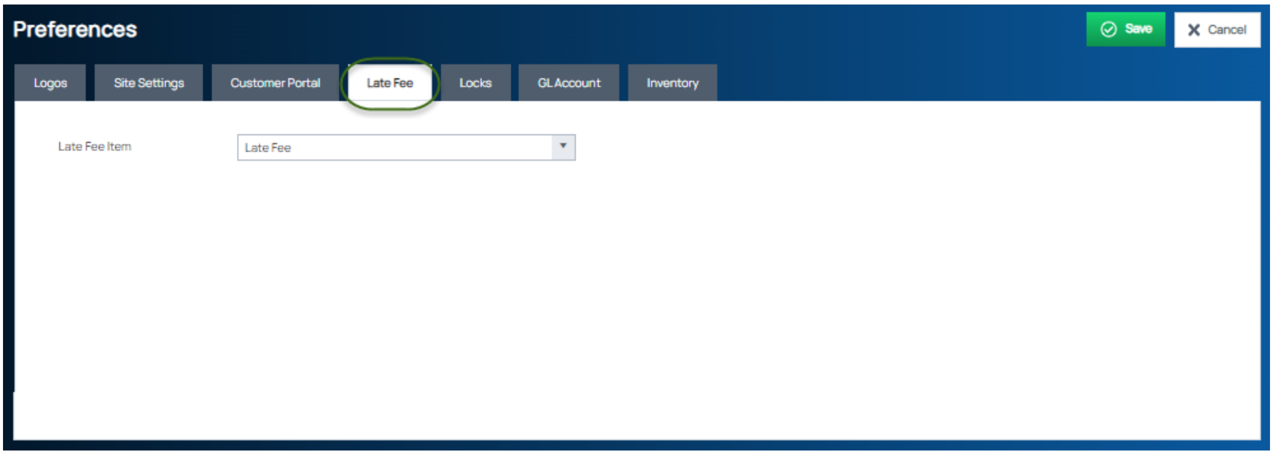
This setup form has options related to allowing customers access to the company's customer portal. The Customer Portal, if activated, allows a company's customers to access their account information via a special URL provided.



- **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 will appear.
- **Hide Logo** — This hides the Managely logo on the customer portal.

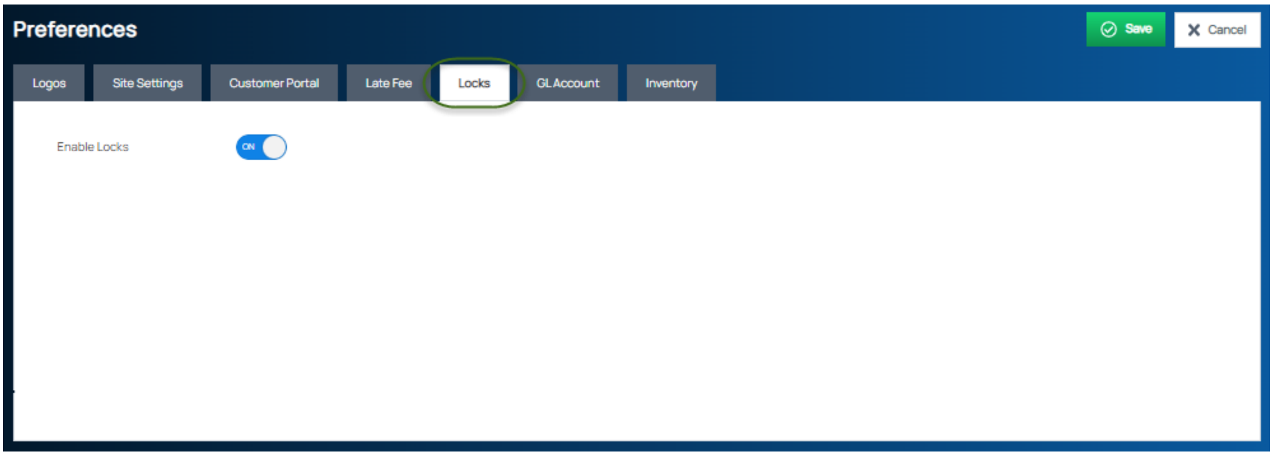
Late Fee

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

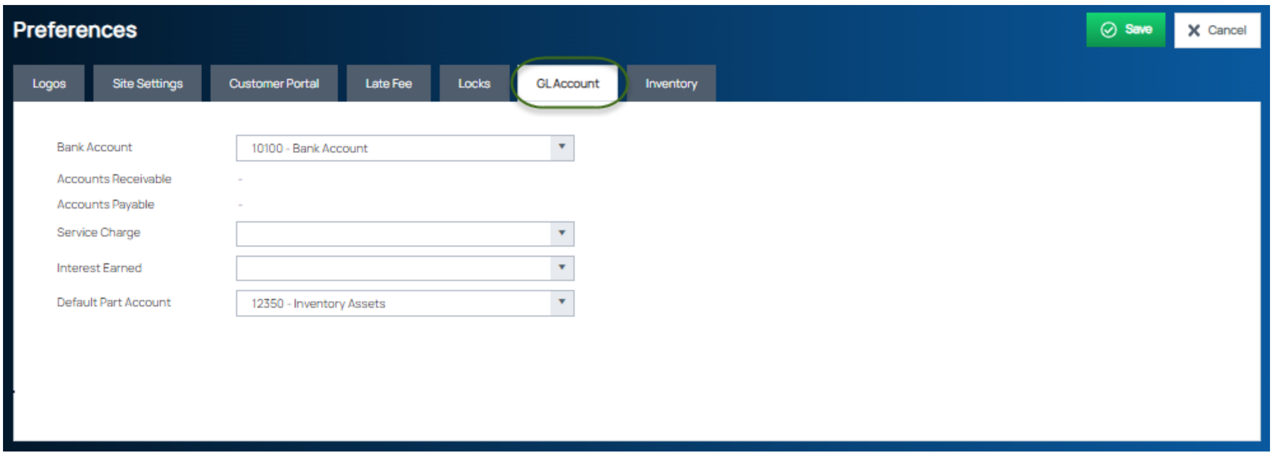


Locks

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).



Use this tab to select G/L Accounts that will be used for various transactions performed within the software.



Data Entry Fields

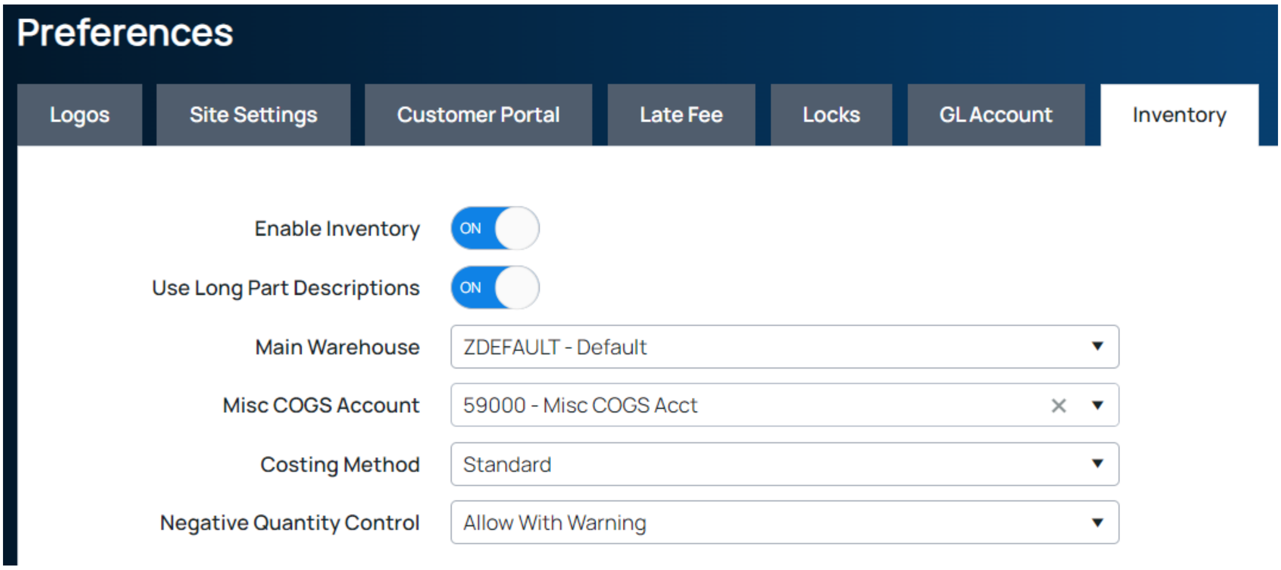
- **Bank Account** &nmash; Select the G/L Account associated with the company's primary bank account.
- **Accounts Receivable** — This field is for future development.
- **Accounts Payable** — This field is for future development.
- **Deferred Income** — This is the default GL account used if a deferred 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.
- **Service Charge** — Select the G/L Account that will be used for posting a bank statement fee associated with a bank when performing a bank account reconciliation.
- **Interest Earned** — Select the G/L Account that will be used for posting interest earned on a bank account when performing a bank account reconciliation.
- **Default Part Account** — Select the G/L Account that will be used as the default cost of goods sold account when parts are sold on a manual customer invoice.

Inventory

This form is used to set defaults that control inventory-related information and transactions.



Data Entry Fields

- **Enable Inventory** — If your company will be tracking on-hand quantities and amounts for your inventory parts, click this button to the On mode.
- **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 that will be used 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 uses standard 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.