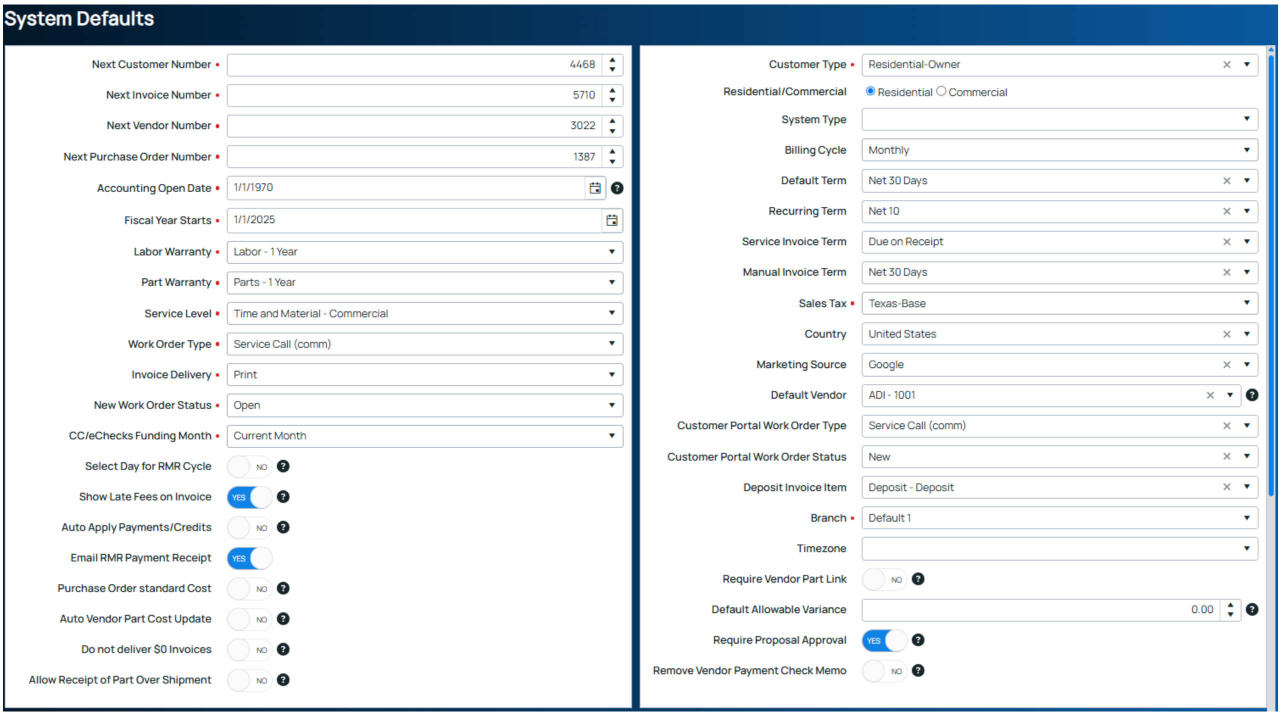
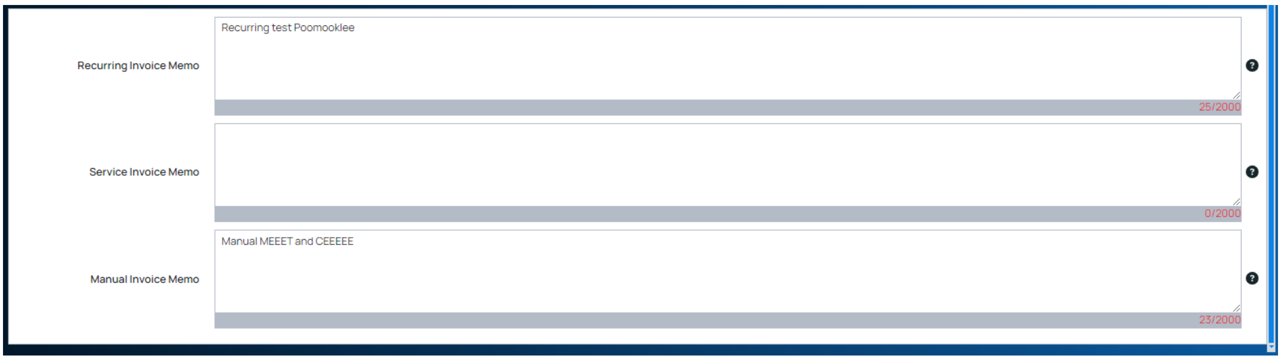
System Defaults

Last Modified on 06/23/2025 7:59 pm EDT

Use this page to set default values that will be used in various areas of the application. Setting defaults expedite the data entry process for users.





Data entry fields preceded by an asterisk are required.

The software automatically assigns a number when creating a new Customer, Invoice, Vendor, or Purchase Order. You are required to enter the next number to be used for each of these items.

If data is being converted from a legacy software product, follow these guidelines:
Find the highest number in your current data and increase that number by 1,000.
—Or—
Round up to a new numbering series. For example, if the highest number in your current data is 1,350, you may want to start your numbering at 2,000.

- *__Next Customer Number__: When creating a new customer, the software automatically assigns the customer number. Enter the next customer number to be used. The customer number will print on customer invoices.
- *__Next Invoice Number__: When creating a new customer invoice, the software automatically assigns the invoice number. Enter the next invoice number to be used.

- *__Next Vendor Number__: When creating a new vendor record, the software automatically assigns the vendor number. Enter the next vendor number to be used.

  Note: If your company will not be using the Accounts Payable module, you still need to enter a value in this field.

- *__Next Purchase Order Number__: When creating a new purchase order, the software automatically assigns the invoice number. Enter the next invoice number to be used. If your company will not be using the Accounts Payable module, you still need to enter a value in this field.
- *__Accounting Open Date__: Enter the date your company will begin using the software to process financial transactions. Always begin on the first day of the month.
- *__Fiscal Year Starts__: Enter the first day of your company's fiscal accounting year. (Typically January 1st of the current year.)
- *__Labor Warranty__: Make a selection from the drop-down list. When creating a new customer System, the Labor Warranty is a required field. The choice you make is the default when creating a new System. Warranty Types are set up in Setup > Operations > Warranty Types.
- *__Part Warranty__: Make a selection from the drop-down list. When creating a new customer System, the Part Warranty is a required field. The choice you make is the default when creating a new System. Warranty Types are set up in Setup > Operations > Warranty Types.
- *__Service Level__: Make a selection from the drop-down list. When creating a new customer System, the Service Level is a required field. The choice you make is the default when creating a new System. Service Levels are set up in Setup > Operations > Service Levels.
- *__Work Order Type__: Make a selection from the drop-down list. When creating a new Work Order, the Work Order Type is a required field. The choice you make is the default when creating a new Work Order. Work Order Types are set up in Setup > Operations > Work Order Types.
- *__Invoice Delivery__: Make a selection from the drop-down list. Choices are email, mail, or print. When creating a new customer, Delivery Method is a required field. The choice you make is the default when creating a new customer.
- *__New Work Order Status__: Make a selection from the drop-down list. When creating a new Work Order, the Work Order Status is a required field. The choice you make is the default when creating a new Work Order. Work Order Statuses are set up in Setup > Operations > Work Order Status.
- *__CC/eChecks Funding Month__: Make a selection from the drop-down list. If a customer is set up for auto-pay for recurring invoices, your selection determines when the EFT will be processed. The choice made here affects all auto-pay customers. These are the choices: Two Months Back, Previous Month, Current Month, Next Month, and Two Months Ahead. The most typical choice is Current Month.
- **Select Day for RMR Cycle**: YES/NO Setting this switch to YES adds a Processing Day field to RMR that allows users to choose a specific day of the month that the RMR will cycle on. Setting this switch to NO means all RMR will cycle to the first of each month to the end of that month.
- **Show Late Fees on Invoice**: YES/NO If you set this switch to YES, any late fees on the customer's account will be printed on invoices. Also, setting this switch to YES automatically recalculates late fees prior to the generation of recurring invoices; this way late fees are up to date. Late fees are calculated using the settings in the Statement Rules setup (Setup > Accounting > Statement Rules). If this switch is set to YES and you want to exclude certain customers from this setting, edit the customer record and set the Show Open Invoices option to NO.
- **Auto Apply Payments/Credits**: YES/NO If this switch is set to YES, when generating recurring invoices, if the customer has any unapplied payments on their account, these will automatically be applied to the next recurring invoice.
- **Email RMR Payment Receipt**: YES/NO If this switch is set to YES, and a customer is on auto-pay for their recurring invoices, an email will be sent to the customer advising the payment is being processed electronically.
- **Purchase Order Standard Cost**: YES/NO If this switch is set to YES, new purchase orders will use the standard

cost for parts instead of the vendor cost. This is a global setting used for all parts and vendors when a purchase order is created. By default, this is NO. (This is a Pro feature.)

- **Auto Vendor Part Cost Update**: YES/NO If this switch is set to YES, a part's vendor cost is updated with the most recent purchase order cost associated with the part. This is a global setting used for all parts and vendors when a purchase order is created. By default, this is NO. (This is a Pro feature.)
- **Do not deliver $0 Invoices**: YES/NO If this switch is set to YES, Managely will not deliver any zero-dollar invoices.
- **Allow Receipt of Part Over Shipment**: YES/NO If this switch is set to YES, Managely allows receipts of parts over the expected shipment.
- ***Customer Type**: Make a selection from the drop-down list. When creating a new customer, the Customer Type is a required field. The choice you make is the default when creating a new Customer. Add Customer Types in Setup > Other > Customer Types.
- **Residential/Commercial**: Choose the default for the customer wizard. Users can change this on the customer wizard when entering a new customer.
- **System Type**: Make a selection from the drop-down list. When creating a new System, the System Type is a required field. The choice you make is the default when creating a new System. System Types are set up in Setup > Other > System Types.
- **Billing Cycle**: Make a selection from the drop-down list. When creating a new RMR, the choice you make is the default. Choices are Monthly, Quarterly, Semi-Annual, and Annual.
- **Default Term, Recurring Term, Service Invoice Term, Manual Invoice Term**: Make a selection from each drop-down list. When creating a new customer, each of the term fields is required. The choices you make are the defaults when creating a new customer. Term codes are set up in Setup > Accounting > Terms.
- ***Sales Tax**: Make a selection from the drop-down list. When creating a new site, the Sales Tax field is required. The choice you make is the default when creating a new site. Sales tax codes are set up in Setup > Accounting > Sales Tax.

  Note: If your company does not charge sales tax on your customer invoices or credit memos, you still need to set up one Sales Tax code with a rate of zero.

- **Country**: Make a selection from the drop-down list. This is the country in which your company does business.
- **Marketing Source**: Make a selection from the drop-down list. When creating a new proposal, the Market Source field is required. The choice you make is the default when creating a new Proposal. Marketing Sources are set up in Setup > Proposals > Marketing Sources.
- **Default Vendor**: Make a selection from the drop-down list. When creating a new inventory part, the Main Vendor field is required. The choice you make is the default when creating a new part. Vendors are set up in Accounts Payable > Vendors.
- **Customer Portal Work Order Type**: For companies that have activated the Customer Portal and have set the option Enable Work Orders to On, your customers are able to enter work orders. This field is the default for work orders created by your customers.
- **Customer Portal Work Order Status**: For companies that have activated the Customer Portal and have set the option Enable Work Orders to On, your customers are able to enter work orders. This field is the default for work orders created by your customers.
- **Deposit Invoice Item**: Choose a default. These come from Setup > Items & Parts > Items.
- ***Branch**: Choose a default. These come from GL > Branches.
- **Timezone**: The time zone in this field is the default used when creating customers. When creating customer sites, the customer site time zone defaults from the customer. If the customer is missing the time zone, the customer site uses the time zone from the System Defaults page.
- **Require Vendor Part Link**: YES/NO When this switch is set to YES, only parts associated with the selected vendor are displayed when creating a purchase order.
- **Default Allowable Variance**: This is the amount of variance allowed between the system calculated total and the amount returned from the tax service. If it is within the variance, the returned amount will be used for the

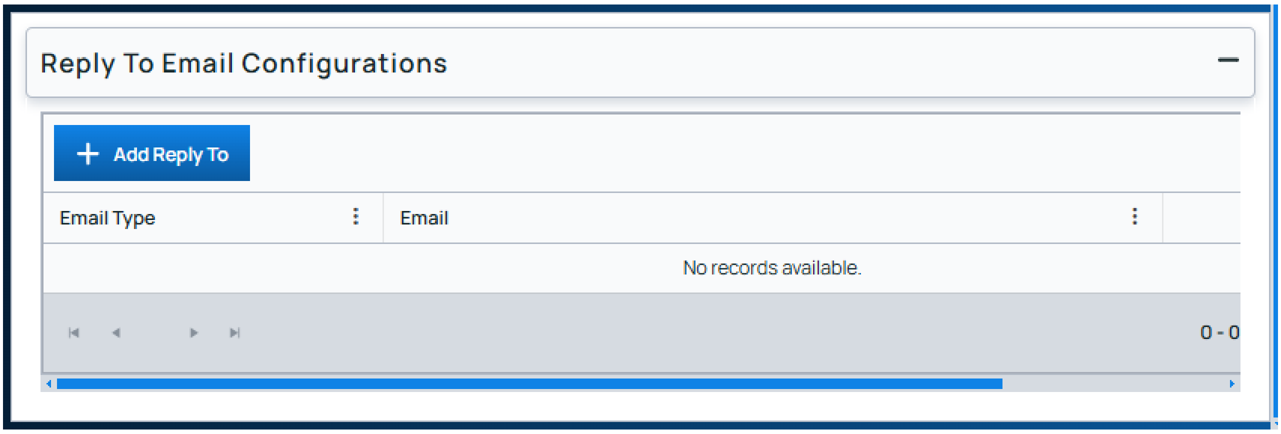
invoice total.
- **Require Proposal Approval**: YES/NO Set this switch to YES to require proposals to follow an approval process. **NOTE**: Do not set this to NO if any proposals are pending approval; the edit button on the proposals will be disabled, and no one will be able to edit the proposal.
- **Remove Vendor Payment Check Memo**: YES/NO Set this switch to YES to hide the memo and payment number on printed checks (Accounts Payable > Payments > select check # > click Print in top right). If this switch is set to NO, printed vendor checks will include the memo and payment number. The default for this switch is NO.
- **Recurring Invoice Memo**: Any text entered into this field will print on all recurring-type invoices.
- **Service Invoice Memo**: Any text entered into this field will print on all work order type invoices.
- **Manual Invoice Memo**: Any text entered into this field will print on all manual type invoices.

Editable Reply-To Address for All System Generated Emails

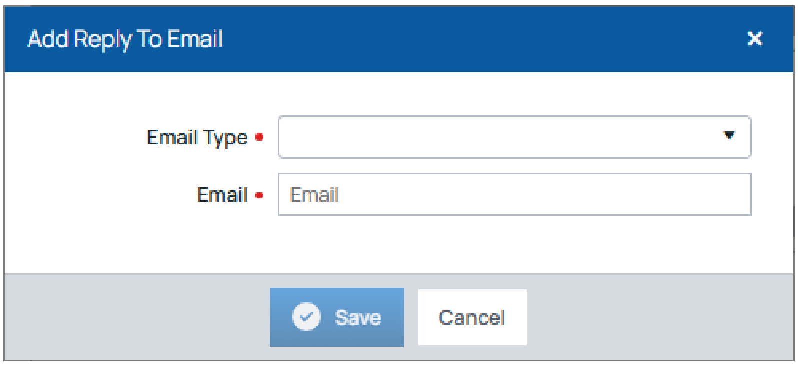
You can define the Reply-To Address for all emails that are sent from the system (fox example, Daily Email Summary, RMR Summary and Invoices, etc.). This is to help with everyday workflow of emails from the system.

At the bottom of the System Defaults page, click the + at the right of the Reply To Email Configurations section:

When expanded, you can see the Add Reply To button and a grid showing the Email Type and Email:



Click the **Add Reply To** button:



Choose an **Email Type**. These are various entities in Managely that can send emails such as calendar events, contracts, credit approvals, etc.

Type a valid **Email** address. This address will receive replies to any entity in Managely that sent an email. For example, if someone replies to a calendar event sent from Managely, this email address will receive the reply.

There are two options for existing reply to emails that have been configured: Delete and Edit. Edit only allows changing the reply to email address. If you need to change the email type, delete the configuration, select the correct email type and choose the email address.