

Setup Requirements

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We encourage all companies to use all features of the application. If your company wants to implement only certain modules of the software, the charts below indicate which setup options must be populated prior to using the software.

Company Setup

Setup Option	Path	Prerequisites	Req'd for A/R	Req'd for A/P	Req'd for Inv
Users	User Manager > Users		X	X	X
Company Info			X	X	X
Logos	Preferences > Logos				
Site Settings	Preferences > Site Settings		X	X	X
Customer Portal	Preferences > Customer Portal				
Late Fee	Preferences > Late Fee	Items & Parts > Items			
Locks	Preferences > Locks				
GL Account	Preferences > GL Account	Accounting > GL Accounts Bank Accounts	X X	X X	X
Inventory	Preferences > Inventory	Inventory > Warehouses			X
System Defaults			X	X	
Employees			X		
Theme Editor					

Accounting Setup

Setup Option	Path	Prerequisites	Req'd for A/R	Req'd for A/P	Req'd for Inv
Sales Tax		Accounting > GL Accounts	X		
Terms			X	X	
Statement Rules			X		
Credit Card Types			X		
GL Accounts			X	X	X
Bank Accounts		Accounting > GL Accounts	X	X	
Branches			X	X	
Categories					

Operations Setup

Setup Option	Path	Prerequisites	Req'd for A/R	Req'd for A/P	Req'd for Inv
Work Order Types			X		
Work Order Status			X		
Warranty Types			X		
Service Levels		Items & Parts > Items	X		

Custom Fields					
Tags					

Items & Parts Setup

Setup Option	Path	Prerequisites	Req'd for A/R	Req'd for A/P	Req'd for Inv
Invoice Items	Items > Invoice Items	Accounting > GL Accounts	X		
Vendor Purchase Items	Items > Vendor Purchase Items	Accounting > GL Accounts		X	
Parts		Accounting > GL Accounts, Accounts Payable > Vendors	X	X	X
Part Kits		Items & Parts > Parts			
Items	Types > Items	Items & Parts > Items			
Parts	Types > Parts	Items & Parts > Parts			
Manufacturer					

Other Setup

Setup Option	Path	Prerequisites	Req'd for A/R	Req'd for A/P	Req'd for Inv
Customer Types			X		
System Types			X		
Document Types					

Recurring Reasons			X		
RMR Groups					
Central Stations					
Authorities					
Signal Types					
Credit Reasons			X		