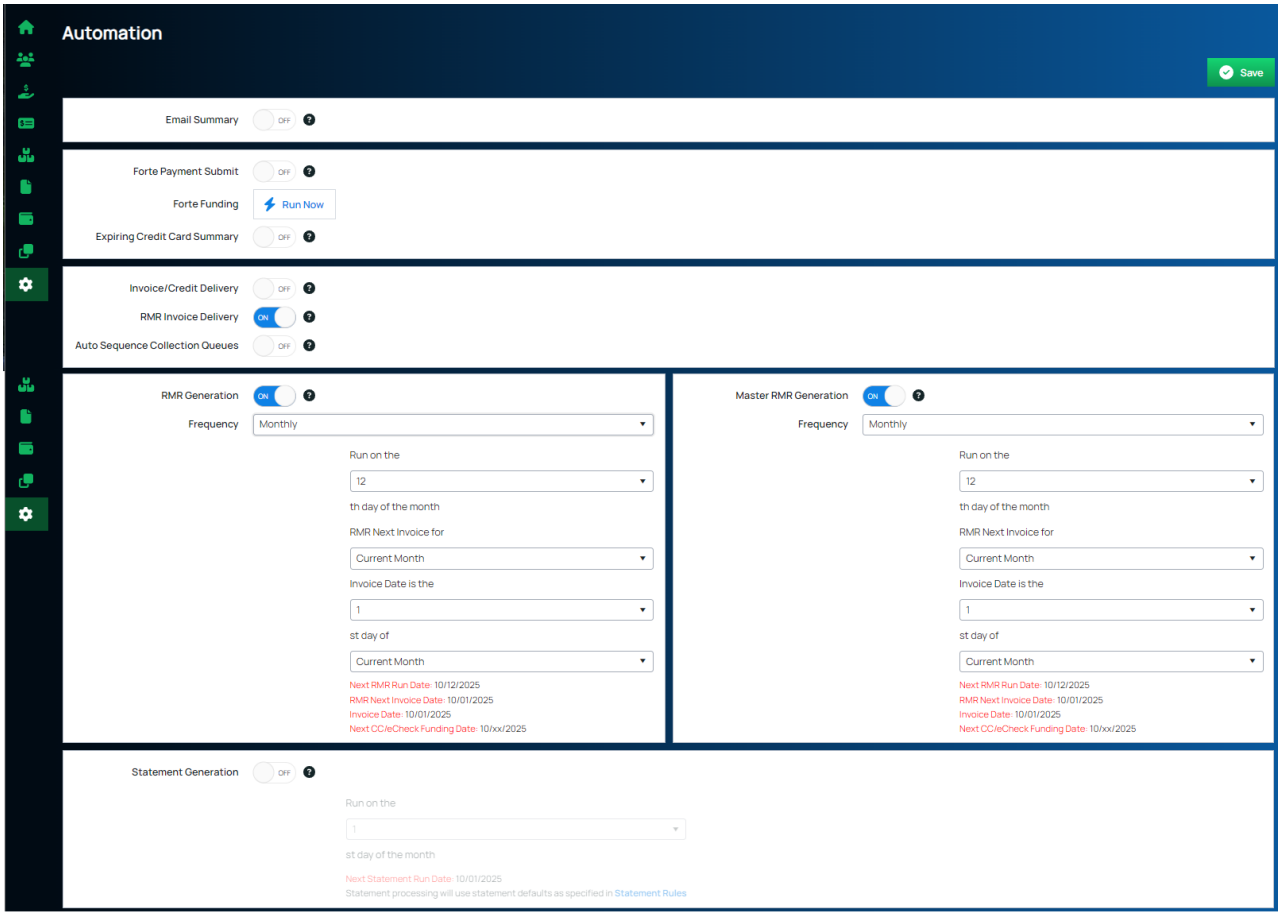
Automation

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The Automation setup page contains several options, primarily related to accounts receivable functions. Turning on the various options automates processes to save companies time in not having to run functions manually. Each option is listed below.



- **Email Summary**: Setting this option to On will send a daily email at 12:30am summarizing the company's daily activity. The email address used is set up on the Company Info page.
- **Forte Payment Submit**: Managely has partnered with CSG Forte (a Merchant Bank) for the processing of customer credit card and ACH transactions.

CSG Forte, one of the premier third-party processors of ACH and credit card transactions in the nation, provides both real-time and batch settlement services for all types of electronic payments. Using the fully integrated features within Managely, processing and collecting ACH and credit card transactions is simple, fast, and accurate. With Managely and CSG Forte, generating payment transactions for both recurring and one-time payments, settling the transactions, receiving the payment in your bank account, and posting the transaction to your customer's account is seamless and built into the Managely application.

Managely provides several options for generating an automatic payment with the use of a customer credit card or customer bank account.

- Automatic payment of recurring invoices
- Automatic payment for one or multiple invoices
- Automatic payment for non-recurring invoices
- Automatic payment that will post to the customer's unapplied cash (typically used for advance deposits for an

installation work order).

If your company opts to use CSG Forte's EFT processing, setting this button to On, will automatically submit transactions for funding at 8:00 AM and 5:00 PM every day.

- **Forte Funding**: Clicking this button automatically launches the EFT transaction funding process.
- **Expiring Credit Card Summary**: For companies using CSG Forte for EFT transactions, setting this button to On, will email a report on the first day of each month at 4:30 AM, containing a list of credit cards expiring in the current month.
- **Invoice/Credit Delivery & RMR Invoice Delivery**: Managely has partnered with Sebis Direct Document Management as our sole provider for outsource printing of Invoices and Statements. The Sebis printing and mailing services allow you to outsource the printing and mailing of invoices, statements, and other correspondence with the click of a mouse. By fully integrating the Sebis within Managely, the setup and ongoing use of Sebis invoice and statement services becomes an effortless process. With Sebis and Managely you can reduce the overall cost of each mailed invoice and statement, adding greater efficiency and profitability to your business.

For more information on the Sebis services, visit their website at: Sebis.com.

If your company will be using Sebis for printing and mailing invoices, set this toggle button to On. When invoices, credits, and recurring invoices are created, and the delivery method on a customer record is set to Mail, the file is automatically transmitted to Sebis for printing and mailing.

- **RMR Generation**: Setting this button to On, will automatically generate your company's recurring invoices for non-master customers. Your company will also specify the day of the month to generate the invoices and what day of the month the invoices should be dated. If this button is set to Off, your company will need to manually generate recurring invoices from the accounts receivable module.
- **Frequency**: Select Monthly or Daily. By default, this is set to Monthly, meaning automatic RMR generation happens once a month on the day selected. Setting this to Daily will run the RMR process every day (at 3:00 AM server time) for the RMRs for that day. The advantage of running RMR daily is that dealers can distribute billing across the month, instead of having all RMR run on one day. Customer cycles start on each day of the month. The RMR process runs more frequently, operating over fewer RMR, so the performance will be faster.
- **Master RMR Generation**: Setting this button to On, will automatically generate your company's recurring invoices for master customers. Your company will also specify the day of the month to generate the invoices and what day of the month the invoices should be dated. If this button is set to Off, your company will need to manually generate recurring invoices from the accounts receivable module.
- **Frequency**: Select Monthly or Daily. By default, this is set to Monthly, meaning automatic RMR generation happens once a month on the day selected. Setting this to Daily will run the RMR process every day (at 3:00 AM server time) for the RMRs for that day. The advantage of running RMR daily is that dealers can distribute billing across the month, instead of having all RMR run on one day. Master customer cycles start on each day of the month. The RMR process runs more frequently, operating over fewer RMR, so the performance will be faster.
- **Statement Generation**: Setting this button to On, will automatically generate customer statements on the day of the month your company specifies. If this button is set to Off, your company will need to manually generate statements from the accounts receivable module.