

Your Managely Guide: Start Here

Last Modified on 04/24/2024 2:08 pm EDT

We've put together the below outline to guide you through your Managely knowledge journey. This is a mix of eLearning and knowledge-base resources.

Managely eLearning - [Managely: Getting Started](#)

Company

You will need to determine if you are using Managely as a comprehensive business software, or only for specific modules. The **Company Setup** table will allow you to enable specific modules of the software to suit your needs (see: <https://managely.knowledgeowl.com/help/setup-requirements>)

1. [Managely eLearning- Managely: Setup Overview](#)
2. [Managely eLearning - Managely: Setup- Company Information](#)
3. [Managely eLearning - Managely: Setup- Sedona-X Mobile](#) (use only if you purchased Sedona-X Mobile)
4. [Preferences](#)
5. [System Defaults](#)

Accounting

Managely eLearning - [Managely: Setup- Accounting](#)

- [Sales Tax](#)
- [Sales Tax Setup](#)
- [Terms](#)
- [Statement Rules](#)
- [Chart of Accounts](#)
- [Bank Account](#)

Operations

Managely eLearning - [Managely: Setup- Operations](#)

- [Contract Types](#)
- [Add a Work Order Type](#)
- [Add a Work Order Status](#)
- [Warranty Types](#)
- [Add a Service Level](#)

Items & Parts

Managely eLearning - [Managely: Setup- Items & Parts](#)

- Invoice Items
 - Vendor Purchase Items
 - Types
 - **Parts Overview** – *Please note: You can have parts entered in Managely and NOT be using Inventory module: Inventory tracking requires a physical parts count and part transactions will be recorded to the GL. Parts listing without physical quantities can be entered and added to work orders without enabling Inventory module*
 - Parts Kits
1. Utilities
 - Automation
 2. Uploaders
 - Managely eLearning - Managely: Setup- Uploaders
 3. Tasks
 - Managely eLearning - Managely: Setup- Tasks and Proposals
 4. Proposals
 - Managely eLearning - Managely: Setup- Tasks and Proposals (same as above)
 - Add a Proposal Status
 - Proposal Type Overview
 - Packages Overview
 5. Other
 - Managely eLearning - Managely: Setup- Other
 - Customer Types
 - System Types
 - Document Types
 - Recurring Reasons
 - RMR Groups
 - Credit Reasons
 - Central Station Integration
 6. eForms
 - Managely eLearning - Managely: eForms Module

Customer Management

1. Managely eLearning- Managely: Customer User
2. Managely eLearning- Managely: Accounts Receivable- Customer Setup and Proposals
 - New Customer Setup Diagram
 - Types of Customers
 - Notes Overview
 - Sites
 - Systems

3. [Managely eLearning- Managely: Using Alarm Monitoring Integration \(Central Station Integration\)](#)

RMR

[Managely eLearning- Managely: Accounts Receivable- Unapplied Payments, RMR, and Bank Deposits](#)

- [RMR Generation](#)

Work Orders

1. [Work Orders Flowchart](#)
2. [Managely eLearning: Managely: Accounts Receivable- Using Work Orders and Invoices](#)

Proposals

[Managely eLearning- Managely: Accounts Receivable- Customer Setup and Proposals](#)

- [Add a Proposal Using a Sales Package](#)

Calendar

[Managely eLearning: Managely: Accounts Receivable- Using Work Orders and Invoices](#)

- [Calendar Definitions and Navigation](#)
- [Add an Appointment for a Work Order](#)
- [Dispatch an Appointment from the Calendar](#)

Accounts Receivable

1. [Accounts Receivable Flowchart](#)
2. [Managely eLearning- Managely: Accounts Receivable- Customer Setup and Proposals](#)
3. [Managely eLearning- Managely: Accounts Receivable- Using Work Orders and Invoices](#)
4. [Managely eLearning- Managely: Accounts Receivable- Unapplied Payments, RMR and Bank Deposits](#)

Accounts Payable

[Managely eLearning- Managely: Accounts Payable- Vendor Management and Payment](#)

- [Accounts Payable Overview](#)
- [Accounts Payable Flowchart](#)
- [Vendor Record Definitions](#)
- [Vendor List](#)
- [Bills/Credits/Receipts List](#)
- [Payments List](#)
- [Print Checks](#)
- [Purchase Order Definitions](#)
- [Receive/Resolve a Purchase Order](#)
- [Add a Purchase Order Receipt](#)

Inventory **only necessary if using the Inventory module**

1. Inventory Flowchart
2. Managely eLearning- Managely: Inventory Module
3. Warehouses
4. Inventory Adjustment
5. Physical Inventory Overview
6. Parts Overview
7. Parts Ledger Definitions

General Ledger

1. Chart of Accounts
2. General Ledger Overview
3. GL Register

Reports

1. Accounts Receivable Reports
 - AR Aging Report
 - Credit Reasons Report
 - Customer Statements
 - Detailed Deposits Report
 - Funded Transactions Report
 - Invoice/Credit Register Report
2. Accounts Payable Reports
 - AP Aging Reports
3. Accounting
 - Balance Sheet Report
 - GL Posting Report
 - Profit and Loss Report
 - Sales Tax Report
 - Trial Balance Report
 - Work Order Revenue Report
 - Working Trial Balance Report
4. Sales
 - Cash Based Sales Report
 - Cash Based Sales Tax Report
 - Customer Sales Report
 - Detailed Sales Report
5. Customer

- Current RMR Listing Report
- Customer AutoPay Report
- Expired Credit Card Report
- Mail/Email Summary
- Tech Time Report
- RMR Audit Tracking Report
- RMR Distribution Report
- RMR Cancellation Report
- RMR in Force Report
- RMR 12 Month Roll-Forward Report