

Your Managely Guide: Start Here

Last Modified on 05/11/2026 12:45 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
-