



MANAGELYTM

Options

MANAGELY™



Managely is designed to help you change your outlook on your business so you can focus on proactively driving profitable growth. The solution brings together many business management tools security dealers need in one comprehensive platform, serving as a single source of truth. Get more control over your business and streamline operations, reduce costs, and optimize cashflow.



Managely Essentials

Designed to deliver a cost effective solution for small- to medium-sized businesses, Managely Essentials has the features needed to optimize a security and alarm business.



Managely PRO

Featuring increased functionality and multiple user licenses, Managely Pro is designed for organizations aspiring to take their security and alarm business to the next level.



Managely Enterprise

Designed for enterprise organizations with the most sophisticated needs, Managely Enterprise boasts an incredible range of features designed to unlock limitless possibilities for a security and alarm business.

Features

CONTINUED

Client Management (Customers)

Customer Explorer
Available Columns
New Customer
Custom Grid Layouts
Site Management
System Management
Contract Mangement
Master Account Management
Multiple Customer Bill To
Site Transfer
Collections
Cancellations
Document Management
Activity Log
Customer Portal



Essentials

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PRO

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General Ledger

Journal Entry
Register Number Lookup
Accounting Periods
Branches
Chart of Accounts
Deferred Income Management
Auto-Process Deferred Income
GL Categories
Royalties & Commissions
Account Grouping
Bank Account Management
Reconcile Bank Account
Credit Card Management
Reconcile Credit Cards



Essentials

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Accounts Receivable

- Cycle Invoicing
- Payment Processing
- Auto Pay
- Invoicing
- Customize Invoice/Credit/Statement PDF
- Credits
- One-Click Credit Invoices
- Credit Approval
- Deposit Management
- Send Invoices (Batches, Print, Mail, Email)
- Statements
- Unapplied Cash/Credits
- Late Fees
- Part Pricing Levels
- RMR Grouping
- RMR Processing Date
- RMR Roll Up
- RMR Rate Increases
- Assemblies/Kits/Bundles

Essentials

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Enterprise

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Accounts Payable

- Bills
- Credits
- Pay Bills
- Print Checks
- Purchase Orders
- Receipts
- Part Kits
- Vendors
- Vendor Parts
- Write Checks
- Send Purchase Orders
- Direct Expense
- Recurring Bills
- Suggested PO List
- Print 1099's
- Tax Agencies

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Enterprise

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Work Orders/ Schedule Board

- Work Order Queue (Job/Service)
- Appointment Management
- Appointment Notifications
- Project Management
- Timesheets
- Invoice Work Orders
- Progress Invoicing
- Job Costing
- WIP Support
- Closed Job Recognition Support
- Down Deposit
- Expense Types
- Change Orders
- Tasks
- Issues>Returns
- Gantt Chart (Job Planner)
- Inspection Management
- Display Groups
- Batch Billing
- Retainage/Holdbacks
- Ticket Breaks
- Schedule Board
- Ticket Queue
- Recurring Work Orders
- Misc Appointments
- Print/Send Work Orders
- Schedule Board
- Calendar Resource Availability
- Unscheduled Work Order Calendar
- Work Order Template Engine
- Customize Work Order PDF



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PRO

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Partner Integrations

- PulseM
- WeSuite
- ADI Integration
- Forte
- Microsoft Power BI Dashboarding
- Sebis Mailing Service



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Features

CONTINUED

Inventory

Parts
Warehouses
Transfers
Physical Inventory/Adjustments
Issues/Returns
Receipts/Receive Parts
Repair Order
Standard Costing
Average Costing
Allow/Don't Allow Negative QTY
Special Order Parts
Price List Import



Essentials

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Enterprise

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Mobile App

Offline Capabilities
Invoicing
Time Clocking/Dispatching
Equipment Management
Work Order Creation
Notes and Attachments Upload
Customer Management
Collect Payments
Employee Timesheet Tracking
iOS
Android



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Enterprise

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Proposals

Proposal Queue
Proposal Creation/Delivery
Proposal To Work Order
Proposal to Invoice
Template Engine



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Features

CONTINUED

eForms

Design Over Existing PDFs
Design New WYSIWYG Templates
Email Forms
Multiple Stage Sending
Electronic Signature Capture
Electronic Payment Information Capture
Customer Integrated Forms
Site Integrated Forms
System Integrated Forms
Proposal Integrated Forms



Essentials

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Misc

Custom Fields - Filter/Export
Custom Fields - Required
Docs/Notes - User Access Level
Custom User Roles/Groups
Full Data Export/Backup
Email / SMS Own Account (Twilio, Mandril, etc)
Sebis Mailing Service
API



Essentials

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Stages Central Station Integration

2-Way Sync
Pushing Accounts to Stages
Linking Accounts to Stages
Customer Wizard Push/Link
Contacts & Zones/Configurations Management
System History Tracking
Put System on Test



Essentials

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C O N T I N U E D

Reports

AR - Aging Report	✓	✓	✓
AP - Aging Report	✓	✓	✓
AR - Cash Based Sales Report	✓	✓	✓
AR - Cash Sales Tax Report	✓	✓	✓
AR - Credit Reasons Report	✓	✓	✓
AR - Customer Sales Report	✓	✓	✓
AR - Customer Statements	✓	✓	✓
AR - Detailed Deposits	✓	✓	✓
AR - Detailed Sales Report	✓	✓	✓
AR - Funded Transactions	✓	✓	✓
AR - Invoice/Credit Register	x	✓	✓
AR - Sales By Salesperson	x	x	✓
AR - Work Order Revenue	✓	✓	✓
CM - Current RMR Listing	✓	✓	✓
CM - Customer Auto Pay	✓	✓	✓
CM - Customer Listing Report	✓	✓	✓
CM - Expired Credit Card Report	✓	✓	✓
CM - Tech Time Report	✓	✓	✓
CM - EFT Customer Listing	x	✓	✓
CM - RMR Audit Tracking	✓	✓	✓
CM - RMR In Force Report	✓	✓	✓
CM - RMR 12-Month Forward Report	✓	✓	✓
CM - RMR Cancellation	✓	✓	✓
CM - RMR Changes Detail Report	x	✓	✓
CM - RMR Cycle Analysis	x	✓	✓
CM - RMR Distribution	✓	✓	✓
CM - RMR Cycle Distribution Analysis	x	✓	✓
CM - RMR Increase %	x	✓	✓
CM - RMR Increase Summary	x	✓	✓
CM - RMR Reason Code Summary	x	✓	✓
CM - RMR Summary Listing	x	✓	✓
GL - Accounting Ratios	x	✓	✓
GL - AR Audit	x	✓	✓
GL - Balance Sheet	✓	✓	✓
GL - Balance Sheet Drill In/Comparison	x	✓	✓
GL - Chart of Accounts	✓	✓	✓

CONTINUED

(Continued)

- GL - Deferred Income
- GL - Deferred Income Audit
- GL - GL Posting Report
- GL - Income Statement
- GL - Income Statement Drill/Comparison
- GL - YTD Income Statement
- GL - Register Entries
- GL - Sales Tax Report
- GL - Tax Agency
- GL - Taxable/Non-Taxable Sales
- GL - Trial Balance
- GL - Working Trial Balance
- GN - Mail/Email Summary
- IN - Inventory Stock Status
- IN - Inventory Stock Summary
- IN - Receipt of Goods
- IN - Stock Used
- PM - Commission Due
- PM - Job Cost Summary
- PM - Job Profit/Loss
- PM - Labor Hours
- PM - Project Report
- PM - Project Utilization
- SV - Closed Service Ticket Cost
- SV - Daily Service Snapshot
- SV - Inspection Listing
- SV - Service Sales History

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BOLD GROUP

Bold Group has provided award-winning, trusted business solutions for the security industry for over three decades. Our core products, stages®, Manitou®, SIMS®, SedonaOffice®, and AlarmBiller® are the leading software choices for top security companies and dealers globally. To learn how to increase profitability and efficiency for your business with our full range of alarm monitoring, Security Intelligence, and integrated financial management solutions, call us or visit our website.



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