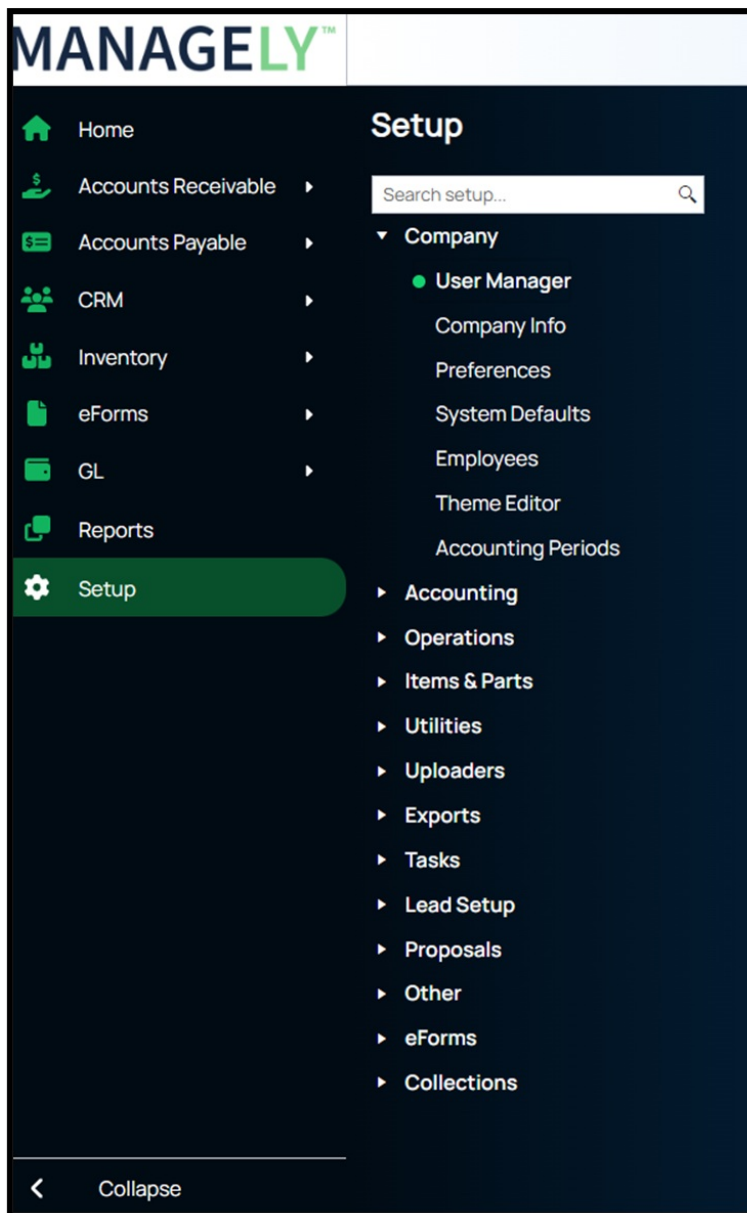


How do I set up a 'reply to' email for the appointment confirmation?

10/03/2024 3:58 pm EDT

Dealer created a case asking where does the appointment confirmation reply to emails go to and if they would like to edit where would they do that.

1. Have an Administrative User log into Managely and then click on Setup and then click Company Info (under Company)



2. Click the Edit Info Button (in the upper right corner)

The screenshot shows the 'Company Info' setup page in the MANAGELY system. The left sidebar contains a navigation menu with options like Home, Accounts Receivable, Accounts Payable, CRM, Inventory, eForms, GL, Reports, and Setup (which is currently selected). The main content area is titled 'Company Info' and features a green 'Edit Info' button in the top right corner. The page is divided into two main sections: 'AlarmBiller' and 'Notes'. The 'AlarmBiller' section contains two columns of information. The left column lists the company name, address (547 E. Washington Street, Apt. 211, Chagrin Falls, OH 44023, United States), and a 'Remit To' section with the same address. The right column lists contact information: Federal ID (440) 551-4464 Ext. 123, Billing Phone, Phone 2, Service Phone (123) 221-2333, Sales Phone (222) 222-2222, Central Station Phone (333) 333-3333, Email Address (jeffg@perennialssoftware.com), and From Name (AlarmBiller Test). The 'Notes' section is currently empty.

3. Update the Email Address field as desired and then push Save

The screenshot shows the 'Company Info Edit' dialog box overlaid on the 'Company Info' setup page. The dialog box contains various fields for editing the company information. The 'Company Name' field is set to 'AlarmBiller'. The 'Email Address' field is set to 'erick@gmail.com'. The 'Mailing Address' field is set to '547 E. Washington Street, Apt. 211, Chagrin Falls, Ohio 44023, United States'. The 'Remittance Address' field is also set to '547 E. Washington Street, Apt. 211, Chagrin Falls, Ohio 44023, United States'. The 'Notes' field is empty. The dialog box has a green 'Save' button and a grey 'Cancel' button at the bottom.

4. In this example, the appointment confirmation will go to Erick@gmail.com