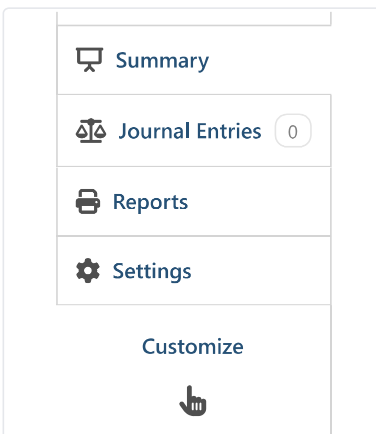
Tabs — Customize

Manager.io is organized into four main tabs: **Summary**, **Journal Entries**, **Reports**, and **Settings**. These tabs form the foundation of a basic double-entry accounting system. However, most businesses require additional functionalities to meet their specific needs. Manager.io allows you to activate additional tabs to tailor the software to your business requirements.

To customize the tabs:

1. Scroll to the bottom of the list of tabs on the left sidebar.
2. Click the **Customize** button.



Activating Tabs

To maintain a clean and straightforward user interface, it's recommended to activate only the tabs you need. You can enable more tabs as your business evolves. Below is a list of available tabs you can activate, along with their descriptions and any dependencies they may have.

Bank and Cash Accounts

Purpose: Manage all transactions related to bank and cash accounts, keeping track of balances and movements.

Receipts

Purpose: Record and track incoming money, helping you maintain accurate income records.

Dependencies: Requires **Bank and Cash Accounts** since each receipt must be linked to a bank or cash account.

Payments

Purpose: Record all outgoing payments, crucial for monitoring expenses and managing cash flow.

Dependencies: Requires **Bank and Cash Accounts** as each payment must be linked to a bank or cash account.

Inter Account Transfers

Purpose: Record transfers of funds between your various bank or cash accounts.

Dependencies: Requires **Bank and Cash Accounts** since each transfer involves bank or cash accounts.

Bank Reconciliations

Purpose: Reconcile your bank statements with your accounting records.

Dependencies: Requires **Bank and Cash Accounts** because each reconciliation is associated with a bank or cash account.

Expense Claims

Purpose: Handle reimbursements for expenses incurred by employees on behalf of the company.

Customers

Purpose: Maintain a database of customer information for effective relationship and sales management.

Sales Quotes

Purpose: Create and manage price quotations offered to prospective customers.

Dependencies: Requires **Customers** as each sales quote must be issued to a customer.

Sales Orders

Purpose: Manage and monitor customer orders until they are completed or billed.

Dependencies: Requires **Customers** since each sales order must be associated with a customer.

Sales Invoices

Purpose: Create and manage invoices sent to customers for goods or services purchased.

Dependencies: Requires **Customers** because each sales invoice must be issued to a customer.

Credit Notes

Purpose: Issue credits to customers, commonly for returns or to correct mistakes.

Dependencies: Requires **Customers** since each credit note must be associated with a customer.

Late Payment Fees

Purpose: Manage and apply extra charges on overdue payments from customers.

Dependencies: Requires **Customers** as each late payment fee must be linked to a customer.

Billable Time

Purpose: Log hours worked on projects for customers that will be invoiced.

Dependencies: Requires **Customers** and **Sales Invoices** because billable time must be associated with a customer and billed via a sales invoice.

Withholding Tax Receipts

Purpose: Organize receipts documenting withholding tax deducted from payments or invoices.

Dependencies: Requires **Customers** and **Sales Invoices** since withholding tax obligations are noted on sales invoices and associated with customers.

Delivery Notes

Purpose: Monitor the delivery of goods to customers, ensuring orders are fulfilled.

Suppliers

Purpose: Manage supplier information, critical for handling purchases and managing supply chain activities.

Purchase Quotes

Purpose: Create and manage price quotations received from suppliers.

Purchase Orders

Purpose: Create and monitor orders placed with suppliers for goods or services.

Purchase Invoices

Purpose: Track and manage invoices received from suppliers.

Debit Notes

Purpose: Issue debit adjustments to suppliers, typically for returns or billing errors.

Goods Receipts

Purpose: Document the arrival of goods from suppliers, facilitating inventory management.

Projects

Purpose: Manage and track different business projects, including costs and revenues.

Inventory Items

Purpose: Manage stock items, including tracking quantities and values.

Inventory Transfers

Purpose: Document the transfer of inventory items between locations or warehouses.

Dependencies: Requires **Inventory Items** since each transfer involves inventory items.

Inventory Write-offs

Purpose: Record inventory items that have been lost, stolen, or are unsellable.

Dependencies: Requires **Inventory Items** because each write-off must be associated with inventory items.

Production Orders

Purpose: Oversee the production process from raw materials to finished goods.

Dependencies: Requires **Inventory Items** as production orders involve inventory items.

Employees

Purpose: Organize employee information, such as contact details and job roles.

Payslips

Purpose: Create and manage payslips for employees, detailing salaries and deductions.

Dependencies: Requires **Employees** since each payslip must be associated with an employee.

Investments

Purpose: Monitor the performance and tracking of business investments.

Fixed Assets

Purpose: Manage tangible long-term assets used in operations, along with their depreciation.

Depreciation Entries

Purpose: Record depreciation expenses of fixed assets over time.

Dependencies: Requires **Fixed Assets** since depreciation entries are linked to fixed assets.

Intangible Assets

Purpose: Manage assets without physical form, such as patents or copyrights, including amortization.

Amortization Entries

Purpose: Document the gradual expense recognition of intangible assets.

Dependencies: Requires **Intangible Assets** as amortization entries are connected to intangible assets.

Capital Accounts

Purpose: Monitor investments, withdrawals, and balances of business owners or partners individually.

Special Accounts

Purpose: Manage unique or specialized financial accounts not covered under other tabs.

Folders

Purpose: Categorize documents and transactions into specific groups for easy access and management.

Saving Your Changes

After selecting the tabs you wish to activate:

1. Scroll to the bottom of the customization page.
2. Click the **Update** button to save your changes.

Update