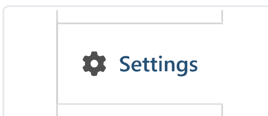
Settings

The **Settings** tab in Manager.io allows you to customize various aspects of your business accounting and enhance specific functionalities. One of the key features available through this tab is the **Chart of Accounts**.



To simplify navigation, the **Settings** screen is divided into two sections:

- **Active Settings**: Features currently in use.
- **Available Settings**: Features not yet activated.

You can activate any feature in the Available Settings section by simply clicking on it.

The **Settings** tab includes the following sections:

Business Details

The **Business Details** form allows you to input information that will appear on your printed documents.

Learn more about Business Details.

Chart of Accounts

The **Chart of Accounts** screen displays an organized list of all the accounts in your business's financial records. This is essential for tracking and reporting financial transactions.

Learn more about the Chart of Accounts.

Date & Number Format

The **Date & Number Format** form lets you specify how dates and numbers are displayed throughout the software and on transaction forms.

Learn more about Date & Number Format.

For newly created businesses, these three sections—**Business Details**, **Chart of Accounts**, and **Date & Number Format**—are active by default.

Access Tokens

In the **Access Tokens** screen, you can generate tokens for API access. This feature is useful for integrating Manager.io with other software or automating tasks using the API.

Learn more about Access Tokens.

Bank Feed Providers

Bank Feed Providers are financial institutions or data aggregators that support the Financial Data Exchange (FDX) standard. By setting up bank feed providers, you can enable bank feeds for your bank accounts.

Learn more about Bank Feed Providers.

Bank Rules

The **Bank Rules** feature automates the categorization of bank transactions. You can set specific conditions to automatically allocate transactions to predefined accounts, saving time and reducing errors.

Learn more about Bank Rules.

Billable Expenses

Billable Expenses are costs your business incurs on behalf of customers with the expectation of reimbursement. These might include materials, external services, or travel costs. You can track these expenses and bill the appropriate customer accordingly.

Learn more about Billable Expenses.

Capital Subaccounts

The **Capital Subaccounts** option allows you to create subaccounts under the Capital Accounts tab. These subaccounts are accessible by all capital accounts, providing detailed tracking of capital transactions.

Learn more about Capital Subaccounts.

Cash Flow Statement Groups

The **Cash Flow Statement Groups** feature enables you to create custom groups displayed on the Cash Flow Statement, allowing for more personalized financial reporting.

Learn more about Cash Flow Statement Groups.

Control Accounts

In the **Control Accounts** screen, you can create, manage, and customize your own control accounts for more precise accounting control and reporting.

Learn more about Control Accounts.

Currencies

The **Currencies** screen allows you to manage and customize the currencies used in your business transactions, essential for businesses operating with multiple currencies.

Learn more about Currencies.

Custom Fields

Custom Fields allow you to add additional fields to your forms, capturing business-specific information in entries. This customization enhances the detail and relevance of your records.

Learn more about Custom Fields.

Divisions

The **Divisions** feature enables you to manage different segments of your business independently. You can analyze income, expenses, assets, and liabilities for each division separately.

Learn more about Divisions.

Email Settings

With **Email Settings**, you can configure Manager.io to send emails directly from the application, facilitating communication with customers and suppliers.

Learn more about Email Settings.

Expense Claim Payers

The **Expense Claim Payers** feature allows you to identify individuals or entities covering expenses for the business that require reimbursement.

Learn more about Expense Claim Payers.

Footers

The **Footers** feature lets you add static text to the bottom of printed documents such as quotes, orders, and invoices. This is useful for including standard terms, conditions, or contact information.

Learn more about Footers.

Forecasts

The **Forecasts** screen allows you to generate projections based on anticipated income and expenses, aiding in financial planning and budgeting.

Learn more about Forecasts.

Inventory Kits

Inventory Kits enable you to group multiple inventory items to be sold as a single kit, streamlining sales of commonly grouped items.

Learn more about Inventory Kits.

Inventory Locations

The **Inventory Locations** feature allows you to manage and set up different physical locations where your inventory items are stored. This is particularly beneficial for businesses operating across multiple sites or with various storage facilities. You can add new locations, modify existing ones, or deactivate locations no longer in use.

Learn more about Inventory Locations.

Inventory Revaluations

The **Inventory Revaluations** section enables you to update average costs for your inventory items, ensuring accurate valuation of stock.

Learn more about Inventory Revaluations.

Investment Market Prices

Investment Market Prices are used to input up-to-date market prices for your investments, keeping your financial records current.

Learn more about Investment Market Prices.

Lock Date

The **Lock Date** feature allows you to set a date before which transactions cannot be edited, preserving the integrity of historical financial data.

Learn more about Lock Date.

Non-Inventory Items

The **Non-Inventory Items** screen lets you set up items that function like inventory items by automatically filling in invoice, order, and quote lines. However, they are not tracked for quantity or value on hand. They serve as shortcuts for frequently used line items.

Learn more about Non-Inventory Items.

Obsolete Features

The **Obsolete Features** section allows you to enable features that are no longer recommended for use, providing access to legacy functionalities if needed.

Learn more about Obsolete Features.

Payslip Items

The **Payslip Items** screen is designed for items used on payslips, such as earnings, deductions, and contributions.

Learn more about Payslip Items.

Recurring Transactions

The **Recurring Transactions** feature is a tool for handling regular business activities. It enables the automatic creation of repetitive transactions like sales invoices, purchase invoices, payslips, and journal entries at fixed intervals.

Learn more about Recurring Transactions.

Tax Codes

The **Tax Codes** screen lets you create and manage tax codes relevant to your business, essential for accurate tax reporting and compliance.

Learn more about Tax Codes.

User Permissions

For cloud or server editions, **User Permissions** allow you to adjust access levels for restricted users within this business file. This enables controlled access to sensitive information and functionalities.

Learn more about User Permissions.

Withholding Tax

The **Withholding Tax** option enables the addition of withholding tax capabilities to invoices, facilitating compliance with tax regulations that require tax to be withheld at the source.

Learn more about Withholding Tax.

Note: All internal links (e.g., *(?business-details-form)*) are placeholders and should be updated with actual URLs or references within the Manager.io documentation when publishing.

This guide provides an overview of the various settings available in Manager.io to help you customize and optimize your accounting processes.