**How to Use Manager.io software**

### ****How to Download & Install Manager.io****

#### ****Step 1: Visit the Official Website****

1. Open your web browser (Google Chrome, Firefox, Edge, etc.).
2. Go to the official **Manager.io** website: [https://www.manager.io/](https://www.manager.io/%22%20%5Ct%20%22_new)

#### ****Step 2: Download the Software****

1. Click on the **“Download”** button at the top of the page.
2. Choose your operating system:
	1. **Windows**
	2. **Mac**
	3. **Linux**
3. Click on the download link to start downloading the setup file.

#### ****Step 3: Install Manager.io****

****For Windows:****

1. Locate the downloaded **.msix** file in your **Downloads** folder.
2. Double-click the file to start the installation.
3. Follow the on-screen instructions and click **“Next”** until installation is complete.
4. Click **“Finish”** and open **Manager.io**.

#### ****Step 4: Open & Set Up Your Business****

1. Open **Manager.io**.
2. Click **"Add Business"** to create a new company profile.
3. Enter your **Business Name** and click **"Create"**.
4. Your **accounting dashboard** is now ready!

#  **Manager.io Naming and renaming business & adding the address**

****Step 5: Setting the Business File Name:****

**During Initial Setup:**

When you first add a business in Manager.io, you'll be prompted to enter a name. This name will appear in the Businesses tab and helps you identify your business within the application.

**Renaming an Existing Business:**

* 1. Navigate to the Businesses tab.
	2. Click on the business name you wish to rename.
	3. At the top of the Manager window, click the Rename button next to the business name.
	4. Enter the new name and click Rename.

 **Access Business Details:**

* Navigate to the **Settings** tab.
* Click on **Business Details**.

 **Update Information:**

* In the **Business Name** field, enter your desired trading name.
* In the **Address** field, input your business address as you want it to appear on transaction forms.
* Select your **Country** from the drop-down list.

 **Add Tax Identification Numbers:**

* To include GSTIN, PAN, or other tax IDs:
	+ Go to the **Custom Fields** section within **Settings**.
	+ Create a new custom field labeled "GSTIN" or "PAN".
	+ Ensure the option **"Show custom field on printed documents"** is selected.
	+ Enter the respective tax ID in the newly created field.

 **Save Changes:**

* Click **Update** to save your new business name, address, country, and tax identification numbers.

# **Manager.io How to remove a business**

**Step 6: To remove a business in Manager.io**

Access the Businesses Tab:

Open Manager.io and navigate to the Businesses tab.

Initiate Business Removal:

Click on the Remove Business button.

Select the Business to Remove:

In the dropdown menu, choose the business you wish to delete.

Confirm the Removal:

Click Remove Business to confirm.

**Manager.io Define Base Currency**

**Step 7: Access the Settings Tab:**

Open Manager.io and navigate to the Settings tab.

Select Currencies

Click on Base Currency.

Define Your Base Currency:

In the Code field, enter the three-letter abbreviation of your currency (e.g., USD for US Dollar).

In the Name field, enter the full name of your currency (e.g., United States Dollar).

In the Symbol field, enter the symbol for your currency (e.g., $).

In the Decimal places field, specify the number of decimal places used in your currency (e.g., 2 for USD).

Save Changes:

Click Update to activate your base currency.

**Manager.io Define foreign currencies**

**Step 8: Access the Settings Tab:**

Open Manager.io and navigate to the Settings tab.

Select Currencies

Click on Foreign Currencies.

Add a New Currency:

Click the New Currency button.

Enter Currency Details:

In the Code field, enter the three-letter abbreviation of the currency (e.g., USD for US Dollar).

In the Name field, enter the full name of the currency (e.g., United States Dollar).

In the Symbol field, enter the symbol for the currency (e.g., $).

In the Decimal places field, specify the number of decimal places used in the currency (e.g., 2 for USD).

Save the Currency:

Click Update to save the new foreign currency.

# **Manager io Use languages**

**Step 9: Access the Language Settings:**

Open Manager.io and navigate to the Preferences tab.

Click on Language.

Select Your Preferred Language:

In the Language section, click on the current language (e.g., English (US)).

A list of available languages will appear.

Choose your preferred language from the list.

Save Changes:

# **Manager io Set the Date & Number Format**

**Step 10: Access the Settings Tab:**

Open Manager.io and navigate to the Settings tab.

Select Date & Number Format:

Click on Date & Number Format.

Configure the Following Settings:

Date Format:

Choose a date format that suits your preference. This will determine how dates are entered and displayed throughout the business.

Time Format:

Select the time format you prefer. This determines how time is displayed throughout the business.

First Day of Week:

Choose the first day of the week that is standard for your region. This setting adjusts the calendar picker to display the calendar in a way that is familiar to you.

Number Format:

Choose the number format appropriate for your region. This format will be applied to how all numbers and currencies are displayed throughout the business.

Save Changes:

Click Update to apply your selected formats.

**Manager io Guides 9 Customize a business & Simplify Manager**

**Step 11: Access the Customize Feature:**

Open your business in Manager.io.

Scroll to the bottom of the left-hand navigation pane.

Click on the 'Customize' button.

Select Desired Modules:

A list of available modules will appear, each with a checkbox.

Modules include options like Bank Accounts, Cash Accounts, Expense Claims, Customers, Suppliers, Projects, Inventory Items, Employees, Fixed Assets, Intangible Assets, Capital Accounts, Special Accounts, and Folders.

Check the boxes next to the modules you want to enable.

Some modules have sub-options, such as Receipts and Payments under Bank Accounts. Selecting these will add them to your navigation pane.

Apply Changes:

After selecting the desired modules and sub-options, click the 'Update' button at the bottom.

Verify the Customization:

The selected modules will now appear in the left-hand navigation pane, allowing you to access them as needed.