Account Settings

Company Location Settings

- Logo: Add or update your company's logo
- Email Settings: Set up your email header/footer
- Name, Address & Phone: Update your company name, address & phone number. Update how it displays when used within AccuLynx
- Localization: Set up company's timezone, business hours & work days
- Permission Settings: Set up permissions based on user roles within your company
- Account Type: Enable account types, allowing you to enter expenses and tell AccuLynx what type of expense they are. Default account types are Commission, Labor, Materials, & Other. You can also add your own account types.
- States or Provinces: Tell AccuLynx whether you are operating in a state or a Province?
- Local tax Rates: Pre-enter your local tax rates. When creating an estimate you will be able to select the appropriate tax rate from a drop down menu
- Add/Edit Vendors: Add people & their contact information here, and their information will be available from the emailing and texting screens
- General Job Costs/Expenses: Job costs & expenses that are entered here are automatically applied to every job
- Customer Portal: AccuLynx users with Customer Portal as an Add-On can set up their Portal settings here. AccuLynx users that do not currently have the Customer Portal as an Add-On can also go here to see a sample portal.
- Dashboard Controls: AccuLynx users can inactivate/activate sections of their Dashboard like the Sales Leaderboard, AccuPay & AccuFi
- Field App Dashboard: Configure AccuLynx Field App widgets here & determine whether other Field App users are able to configure the Dashboard

Manage Contacts

- Required & Custom Fields:Specify which fields are required on the contact form & create custom fields
- Contact Types: Create custom contact types to organize your contacts. Ex: Property Managers, Contractors, Real Estate Managers

Manage Leads

- Dead Lead Settings: If necessary, you can add custom reasons why you may be marking jobs as dead in the system.
- Lead source: Track how you are getting your leads. If it is from a specific person, add their name! If it is from another company, add them too! You can run a report on this, & track where your company is getting their jobs from
- Required Lead Form Fields: This is where you set up which fields are required when Leads are entered into AccuLynx for your company
- Import Contacts & Leads: Import current or past jobs into accuLynx. Let us know if you need help with this
- Export Contacts & Leads: Pull information out of AccuLynx

Job file Settings

- Workflow Manager: (Elite feature) Add statuses between the main Milestones
- Job Numbering: Set up your job numbering. Add a prefix & customize
- Document Folders: Create document folders that will be available when you upload documents into a job
- Photo & Video Tags: Add Photo & Video Tags which allow you to search for photos & videos
- Photo & Video Albums: Add custom Photo & Video albums
- Work Type: Add & remove custom Work Types
- Job Category: Add & remove custom Job Categories
- Trade Manager: Add & edit your company's trades
- Track Insurance Companies: Enable if your company does Insurance work. Add insurance companies, so you can track the companies you are working with

Estimate settings

- Settings: Set up estimate setting, minimum & maximum profit margin, discounts that users can use on estimates, and tax settings
- Disclaimer: Add the disclaimer which will automatically populate at the end of your estimate

Worksheets

- Worksheet Default: Set your default Worksheet as either Financial or Insurance
- Create a Financial Worksheet: Set up how you'd like to start each Financial Worksheet.
    a. Add all details from the primary estimate & the details (default)
    b. Add only the section details from the primary estimate
    c. Start with a blank worksheet (more typical with insurance work & brings no items from the estimate)
- Disclaimer: Pre-populate a disclaimer that will be viewable on worksheets/invoices
- Invoice Numbering: Customize your invoice numbering

Labor Orders & Tickets

- Labor Contacts: Select team members that manage production & labor. Team members added here can be assigned as the Labor Contact on the Labor Ticket
- Disclaimer: Pre-populate a disclaimer that will appear on labor orders/tickets
- Combined Materials & Labor: This allows you to lock material only, allowing you to make changes to labor orders even after material has been ordered

Purchase Orders

- Order Documents
- Header: This is where you enter the contact person and their information which will populate at the header of printed orders
- Disclaimer: Pre-populate a disclaimer that will appear on printed purchase orders

Add-On Features & Integrations

- Add-Ons: This is where all of the available Add-ons and Integrations live. Such as EagleView & GAF Quick Measure, QuickBooks, and our supplier integrations with ABC, Beacon & SRS!

- At the top of the screen, view all of your company's current add-on features
- Select "Learn More" to read about any of the Add-On features, such as pricing & functionality. Some Add-ons even have a video to walk you through the process.
- Selecting "Enable" will enable that Add-on & if there is a charge associated with it, you will begin being charged.

*Some Add-Ons are free and some have a charge, so please read about the Add-on before selecting the "Enable" box.

- API Keys: Allow you to connect external applications with AccuLynx

Administrative Settings **(only Company Administrators have access to these settings)**

- Parent Company Information: Elite users have the ability to create multiple locations. The Parent Company Information screen is where the main location information is set up
- Manage All Locations:This is where additional locations are set up, Inactivated & edited
- User Analytics: View users and analytics
- Billing History: View billing information
- Payment Information: View & change payment information, and see next scheduled payment date