## How to Prevent Work Orders from Being Created Through the Customer Portal (Managely)

Last Modified on 07/01/2024 6:25 pm EDT

This Dealer disabled the customer portal because they did not want their customers to have the ability to request service from the portal. They did want them to have the ability to pay invoices and add payment methods to their account. Follow these steps below to disable work orders from the customer portal

1) Click on the Setup and then click Preferences (under the User Manager Table)

2) Click on the Customer Portal tab, uncheck the Enable Work Orders checkbox and then click Save

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٠	Home		Setup	Preferences			Save X Cancel
	Accounts Receivable Accounts Payable		Search setup 9, • Company	Logos Site Settings	Customer Portal Late Fee Locks GLAccount	Inventory	
	Inventory		User Manager Company Info		<u>e</u>		
	eForms GL		<ul> <li>Preferences</li> <li>System Defaults</li> </ul>	Enable Work Orders Portal Title	AlarmBiller Oustomer Portal		
•	Reports Setup		Employees Theme Editor				
			Accounting Periods  Accounting				
			Operations     Items & Parts     Utilities				
			Uploaders     Exports				
			Tasks     Proposals				
			Other     eForms				
			Collections				

3) Doing so removes the Work Orders tab from the customer portal altogether so the end user will not be able to request service from the customer portal

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