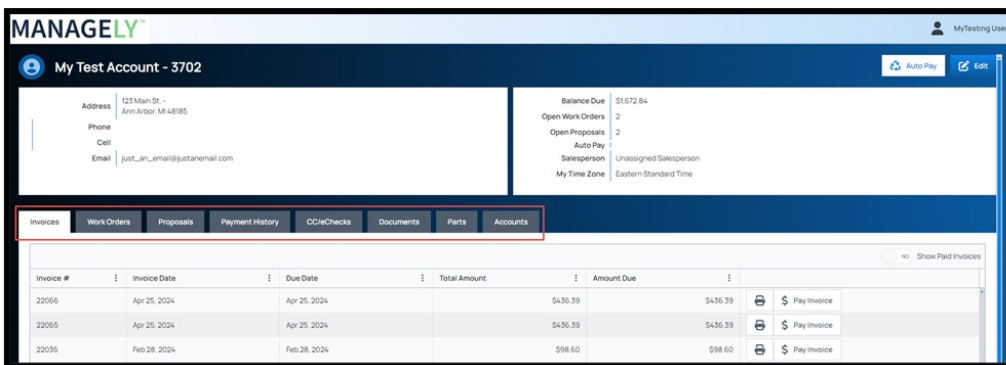


How to Make Work Orders Visible in the Customer Portal

Last Modified on 07/01/2024 6:26 pm EDT

Managely gives the ability for the dealers to give their customers visibility to their work orders in the customer portal, on top of everything that comes default enabled.

By default, customers logged into the customer portal for Managely have access to the invoices, proposals, payment history, CC/eChecks, documents and the accounts section where they can link multiple accounts under one set of credentials. Customers can also enable auto pay (auto payment draft) option using the customer portal.



Work orders can be enabled and become visible on the customer portal for the customers. This option is available and can be turned on or off from Setup -> Preferences -> Customer Portal.

