

Permissions for Manually Creating Customer Portal Users

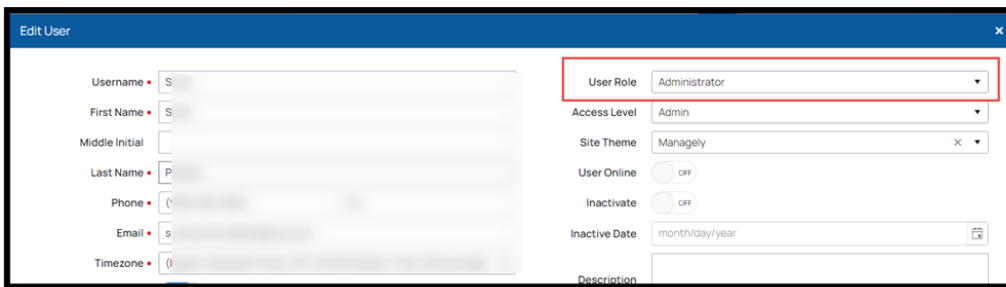
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Managely provides end users (customers of dealers) the ability to access the customer portal.

What are the necessary permissions for an employee to be able to create user credentials for customers to be able to access the customer portal in Managely?

The necessary permission to be able to create credentials for the customer portal in Managely are:

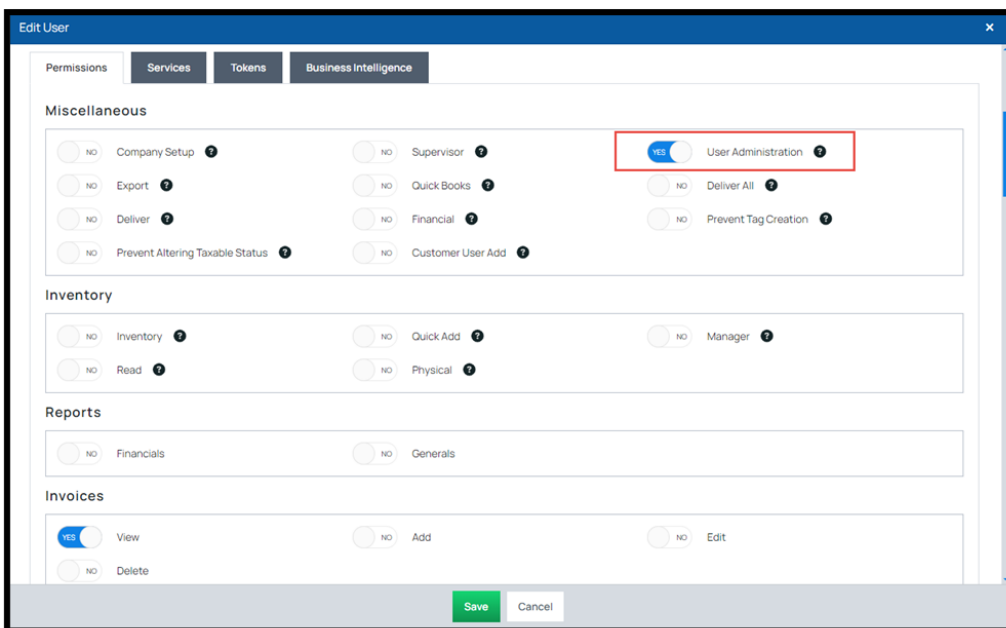
1. Administrator – This user role enables everything access related in Managely:



The screenshot shows the 'Edit User' form with the 'User Role' dropdown menu highlighted in red. The 'User Role' is set to 'Administrator'. Other fields include Username, First Name, Middle Initial, Last Name, Phone, Email, Timezone, Access Level (Admin), Site Theme (Managely), User Online (OFF), Inactivate (OFF), and Inactive Date.

Note: Administrator permission will not display any selectable permissions in the list, since the role comes with everything enabled.

1. For users that are not Administrators, the User Administration permission under Miscellaneous needs to be enabled:



The screenshot shows the 'Edit User' form with the 'Permissions' tab selected. The 'Miscellaneous' section is expanded, and the 'User Administration' permission is highlighted in red. The 'User Administration' permission is set to 'YES'. Other permissions in the 'Miscellaneous' section include Company Setup, Export, Deliver, Prevent Altering Taxable Status, Supervisor, Quick Books, Financial, Customer User Add, and Deliver All. The 'Inventory' section includes Inventory, Read, Quick Add, Physical, and Manager. The 'Reports' section includes Financials and Generals. The 'Invoices' section includes View, Add, Edit, and Delete. The 'Save' button is highlighted in green.

Note: This permission will allow the user to manage all users and user roles.