Managely Customer Portal Setup and Login

Last Modified on 10/20/2025 12:05 pm EDT

Portal Setup

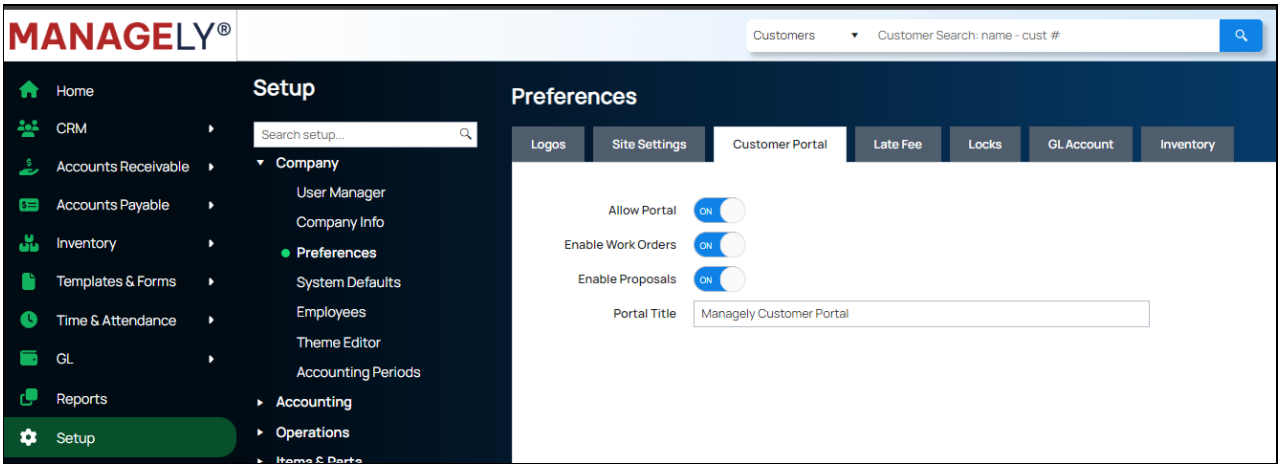
To create a Customer Portal, navigate to the Setup tables:

1. Click on Company>Preferences.
2. Click on the Customer Portal tab.
3. Toggle Allow Portal to ON.
4. If you want your customers to have the ability to create Work Orders:

- Toggle Enable Work Orders to ON.
- In the Defaults Setup table, choose a default Work Order Type and Work Order Status.

5. Portal Title: Name your portal.
6. Click Save.

NOTE: If allowing your customers to create a Work Order, you may want to create a Work Order Status or Type called “Customer Portal” so you can easily distinguish between Work Orders created by your customer and other active Work Orders. You can add this default in the System Default Setup Table.



Customer Registration Information

Your customers will need the following:

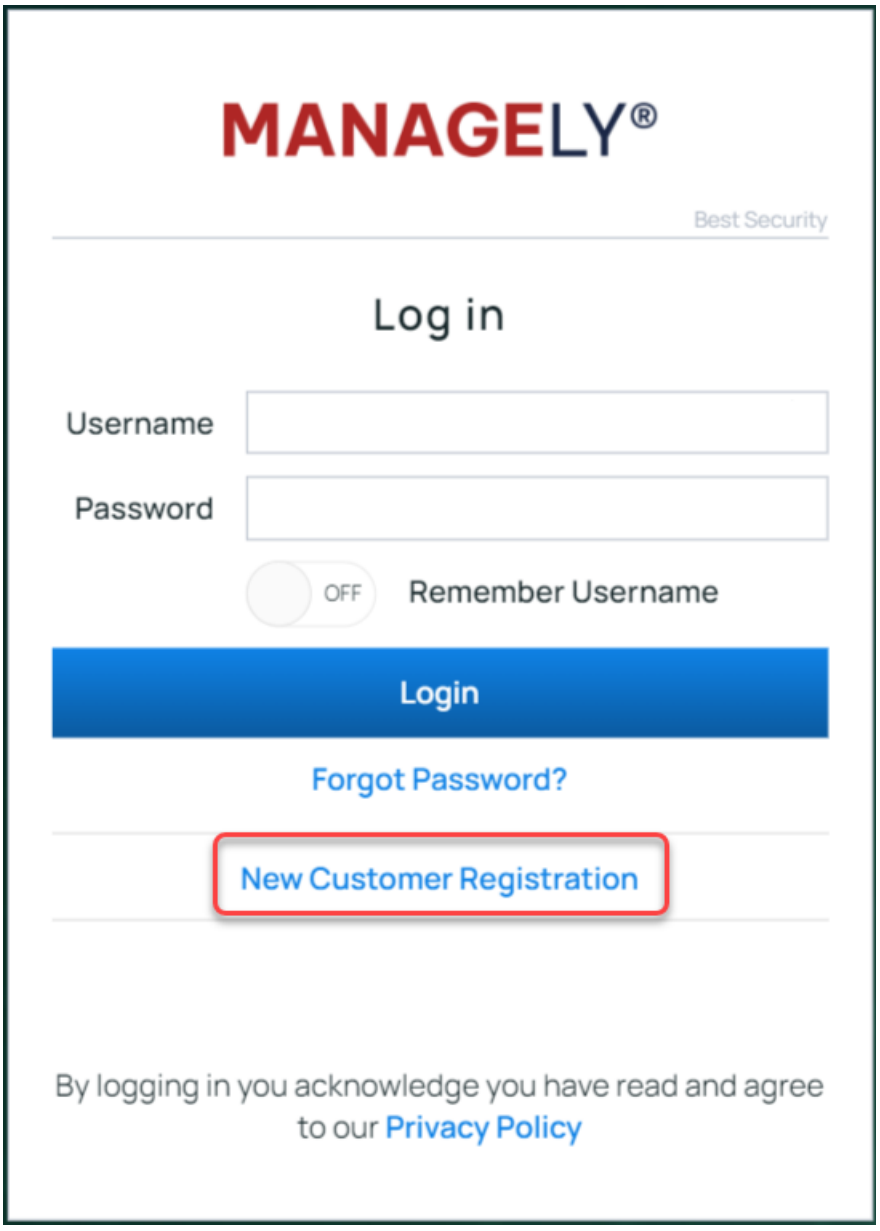
- Customer Number
- Zip Code
- Unique Registration Key

Their Registration Key is on the customer’s invoice, statement, proposal, or work order. If your customer has not yet received an invoice, statement, work order, or proposal that has the Registration Key on it, provide them with their unique Registration Key by logging into Managely and editing their customer profile. Scroll down on their customer profile you will see their unique Registration Key on the right hand side.

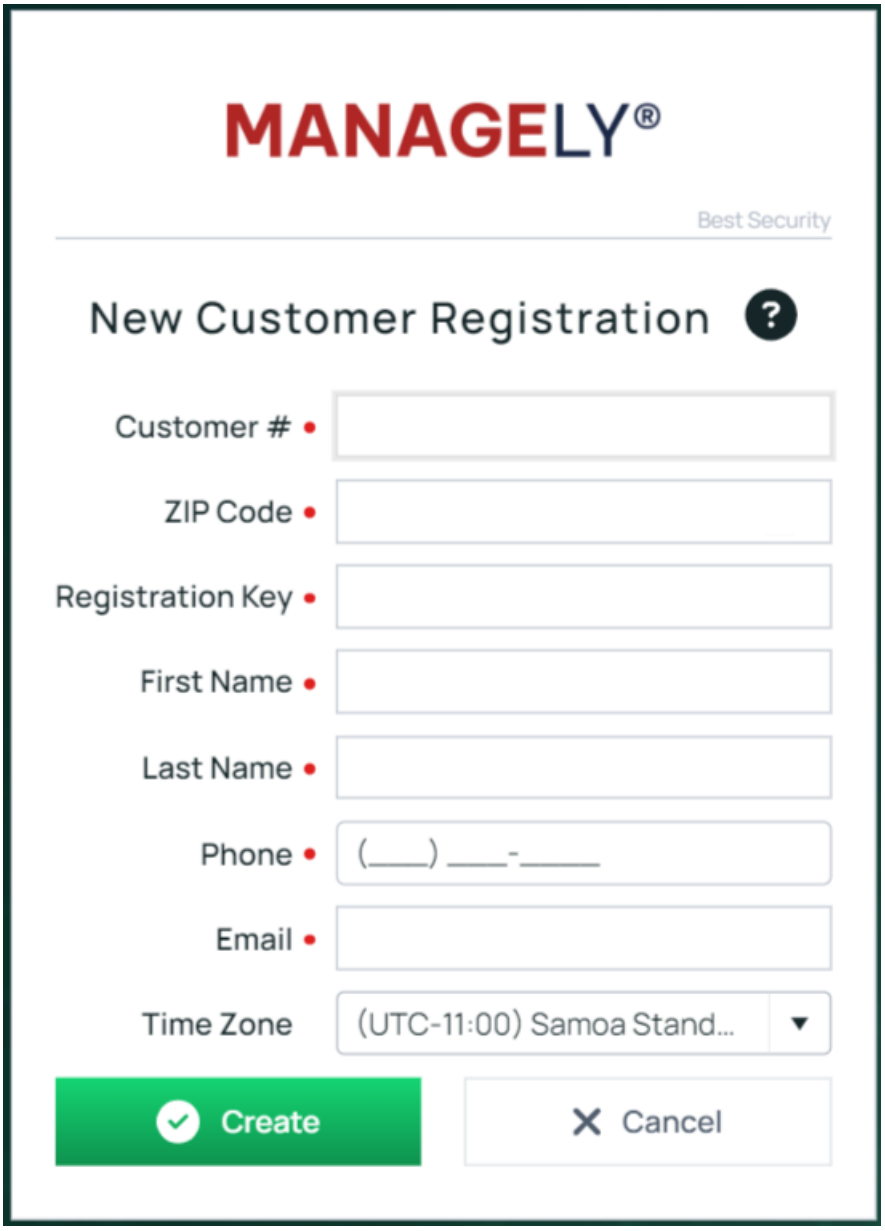
Customer Login

Under your Company's Managely URL:

Have your customer click the New Customer Registration button.



Your customer will need to enter their information to create a login for the Customer Portal. Click Create when finished.


MANAGELY®
Best Security
New Customer Registration
Customer #
ZIP Code
Registration Key
First Name
Last Name
Phone
(___) ___-____
Email
Time Zone
(UTC-11:00) Samoa Stand...
Create
Cancel