Managely Customer Portal Setup and Login

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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 can be found on your 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:

1. Have your customer select the New Customer Registration button

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

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New Customer Registration ❓

Customer # •	
ZIP Code •	
Registration Key •	
First Name •	
Last Name •	
Phone •	(___) ____-_____
Email •	
Time Zone	(UTC-11:00) Samoa Stand… ▼

✓ Create   ✕ Cancel