

Managely Customer Portal Setup and Login

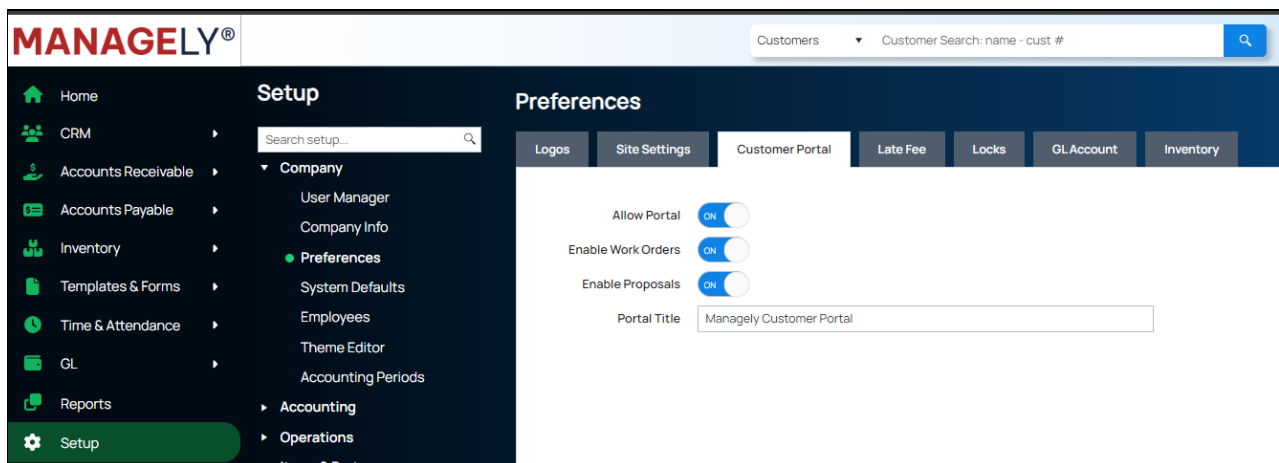
Last Modified on 09/04/2025 8:06 pm EDT

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:

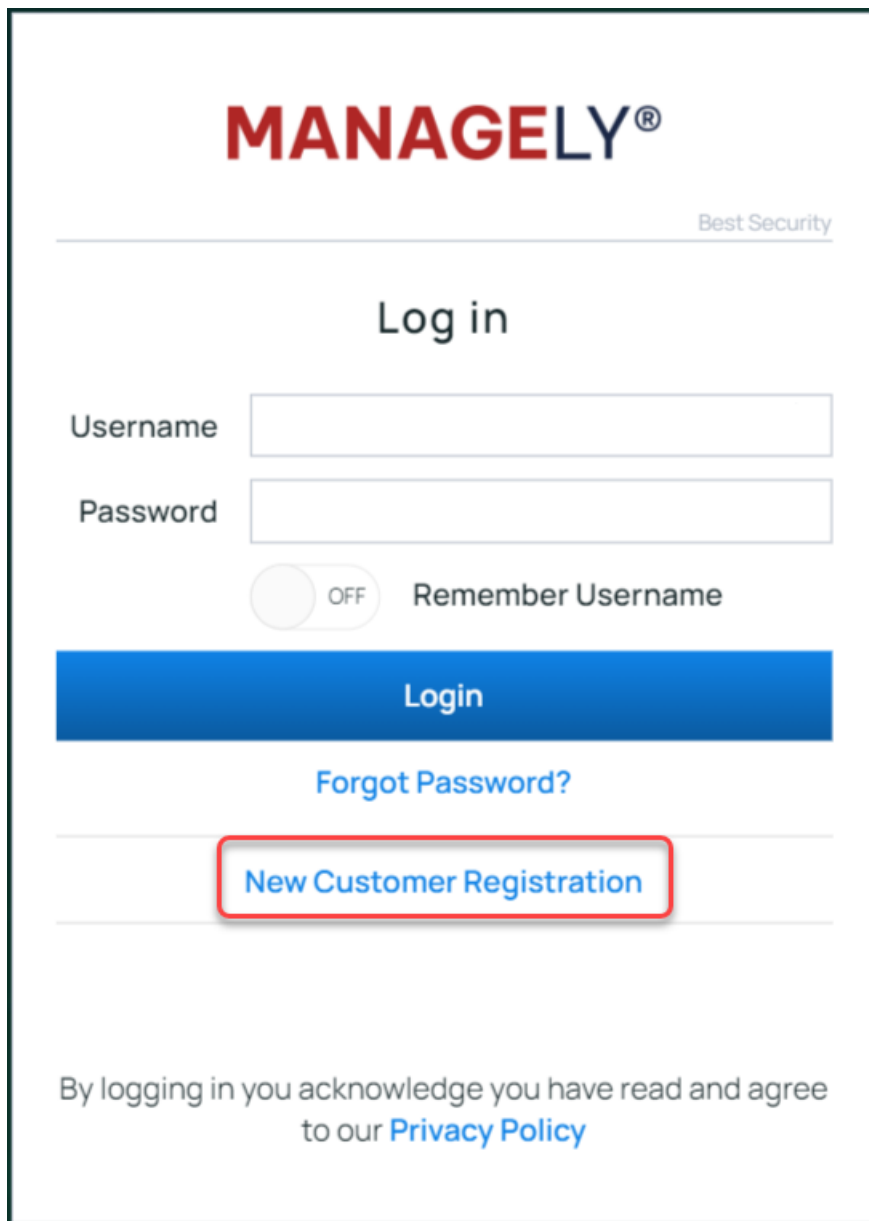
- Customer Number
- Zip Code
- Unique Registration Key

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.



The image shows a web interface for Managely. At the top is the Managely logo in red and blue, with a registered trademark symbol. Below the logo is a horizontal line, and to the right of the line is the text "Best Security". The main heading is "Log in" in a large, black, sans-serif font. Below the heading are two input fields: "Username" and "Password". Below the "Password" field is a toggle switch labeled "OFF" and the text "Remember Username". Below these fields is a large blue button with the text "Login" in white. Below the button is a link "Forgot Password?" in blue. Below the link is a red-bordered button with the text "New Customer Registration" in blue. At the bottom of the form is a line of text: "By logging in you acknowledge you have read and agree to our [Privacy Policy](#)".

MANAGELY®

Best Security

Log in

Username

Password

☐ OFF Remember Username

Login

[Forgot Password?](#)

[New Customer Registration](#)

By logging in you acknowledge you have read and agree to our [Privacy Policy](#)

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

New Customer Registration ?

Customer # •

ZIP Code •

Registration Key •

First Name •

Last Name •

Phone •

Email •

Time Zone

(UTC-11:00) Samoa Stand...



Create



Cancel