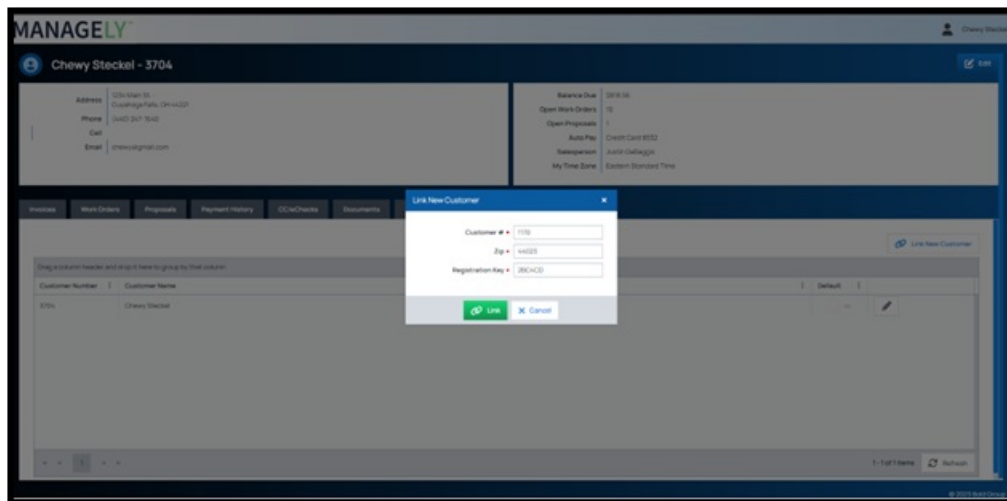


How to link multiple accounts to the customer portal (Managely)

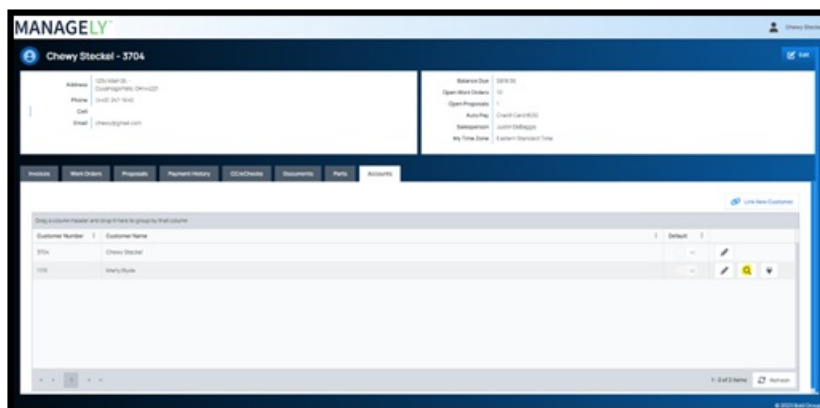
02/12/2024 5:55 pm EST

Sometimes users will have multiple accounts and they would like the ability to pay on each account without making a customer portal login for each account. Managely's customer portal allows you to link multiple accounts. Follow these steps to link accounts in the customer portal.

1. Log into the customer portal.
2. Click on the accounts tab.
3. Click the 'Link New Customer' button fill out the fields ((note: the Customer number, zip code, and registration Key can be obtained from the customer page (Dealer side) or on a proposal/invoice (Customer side)), and push the Link button.



4. Clicking the magnifying glass will allow you to switch between customer 3704 and 1170 accounts.



Marty Blyde - 1170

Auto Pay [Get](#)

Address 127 Village St.
Chapin Falls, ON L6C2G3
Phone
Cell (520) 458-7890
Email

Balance Due \$2,879.67
Open Work Orders 3
Open Proposals 1
Auto Pay
Salesperson Jeff Gortzinski
My Time Zone Eastern Standard Time

Invoices

Work Orders

Proposals

Payment History

CCed Checks

Documents

Parts

Accounts

						Show Paid Invoices	
Invoice #	Invoice Date	Due Date	Total Amount	Amount Due			
21545	Sep 1, 2023	Sep 1, 2023		\$100.96	\$100.96		Pay Invoice
21528	Jun 5, 2023	Jun 5, 2023		\$322.67	\$322.60		Pay Invoice
21463	Dec 1, 2021	Dec 1, 2021		\$347.70	\$347.70		Pay Invoice
21392	Sep 1, 2021	Sep 1, 2021		\$347.70	\$347.70		Pay Invoice
21289	Jun 1, 2021	Jun 1, 2021		\$347.70	\$347.70		Pay Invoice
21138	Mar 1, 2021	Mar 1, 2021		\$395.90	\$395.90		Pay Invoice
21062	Dec 1, 2020	Dec 1, 2020		\$395.90	\$395.90		Pay Invoice
20976	Sep 1, 2020	Sep 1, 2020		\$395.90	\$395.90		Pay Invoice

1 - 17 of 17 Items [Refresh](#)