

Managely – How to find if customers signup for the customer portal

02/12/2024 6:06 pm EST

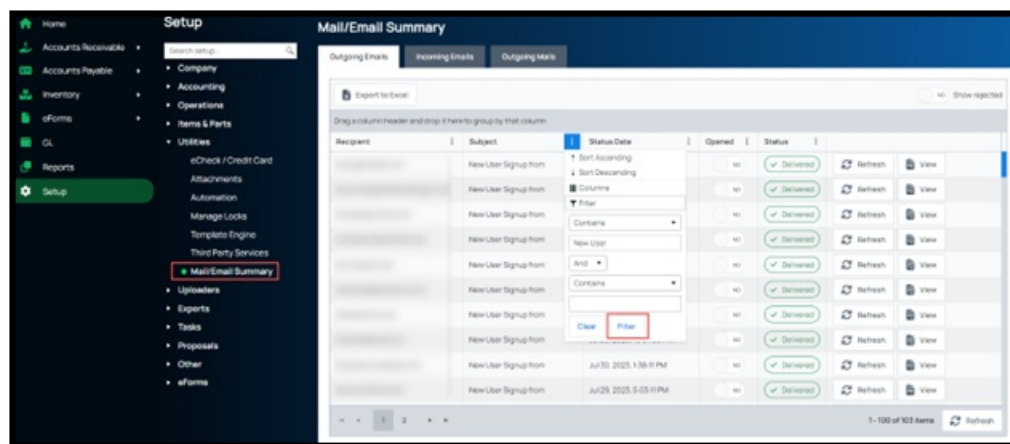
This information can be found by accessing the Managely menu.

Where do I go in Managely to find if customers sign up for access to the customer portal?

Click on the Setup button on the left-hand-side menu.

Click the Mail / Email Summary report underneath Utilities.

A filter for the Subject column can be used for 'New User'.



The subject of the email received by customers is 'New User Signup'.

For a more in-depth or a more granular result, a filter for the 'Recipient' column can be used with the customer's email address.