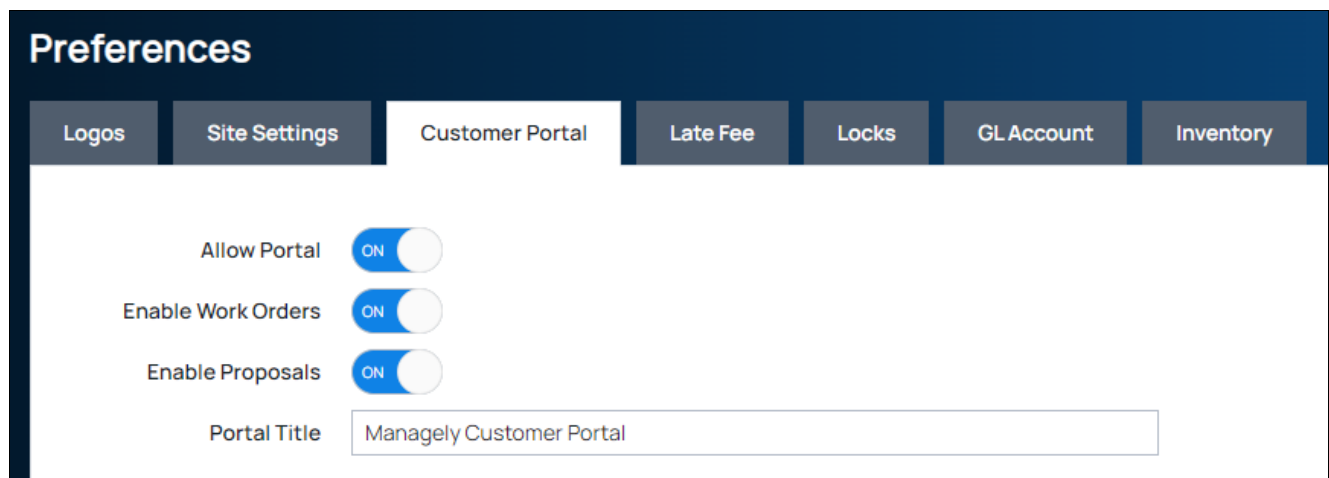


How to Prevent Work Orders from Being Created Through the Customer Portal

09/04/2025 8:06 pm EDT

This Dealer disabled the customer portal because they did not want their customers to have the ability to request service from the portal. They did want them to have the ability to pay invoices and add payment methods to their account. Follow these steps below to disable work orders from the customer portal

1. Click on the Setup and then click Preferences (under the User Manager Table).
2. Click on the Customer Portal tab. Set the **Enable Work Orders** switch to OFF and then click Save.



Preferences

Logos Site Settings **Customer Portal** Late Fee Locks GL Account Inventory

Allow Portal ☒ ON

Enable Work Orders ☒ ON

Enable Proposals ☒ ON

Portal Title

3. Doing so removes the Work Orders tab from the customer portal altogether so the end user will not be able to request service from the customer portal.

MANAGELY

Chewy Steckel - 3704

Chewy Steckel

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Phone

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Balance Due

\$5,665.64

Open Proposals

2

Auto Pay

Credit Card 8552

Salesperson

Justin DeBoggio

My Time Zone

Eastern Standard Time

Invoices

Proposals

Payment History

CC/Checks

Documents

Parts

Accounts

no

Show Paid Invoices

Invoice #	Invoice Date	Due Date	Total Amount	Amount Due	
22069	Mar 22, 2024	Mar 22, 2024	\$163.24	\$163.24	\$ Pay Invoice
22068	Mar 22, 2024	Mar 22, 2024	\$0.00	\$0.00	\$ Pay Invoice
22067	Mar 22, 2024	Mar 22, 2024	\$522.66	\$522.66	\$ Pay Invoice
22065	Mar 18, 2024	Mar 18, 2024	\$0.00	\$0.00	\$ Pay Invoice
22064	Mar 18, 2024	Mar 18, 2024	\$0.00	\$0.00	\$ Pay Invoice
22062	Mar 18, 2024	Mar 18, 2024	\$0.00	\$0.00	\$ Pay Invoice
22061	Mar 18, 2024	Mar 18, 2024	\$0.00	\$0.00	\$ Pay Invoice
22048	Mar 4, 2024	Mar 4, 2024	\$1,474.02	\$1,474.02	\$ Pay Invoice

1 - 28 of 28 items

Refresh

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