

Permissions for Manually Creating Customer Portal Users

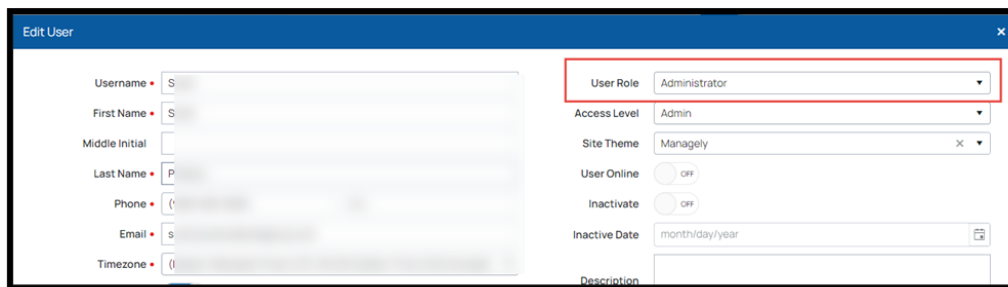
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Managely provides end users (customers of dealers) the ability to access the customer portal.

What are the necessary permissions for an employee to be able to create user credentials for customers to be able to access the customer portal in Managely?

The necessary permission to be able to able to create credentials for the customer portal in Managely are:

1. Administrator – This user role enables everything access related in Managely:



The screenshot shows the 'Edit User' interface. On the left, there are input fields for Username, First Name, Middle Initial, Last Name, Phone, Email, and Timezone. On the right, there are dropdown menus for User Role (highlighted with a red box and set to 'Administrator'), Access Level (set to 'Admin'), and Site Theme (set to 'Managely'). Below these are toggle switches for 'User Online' and 'Inactive', both set to 'OFF'. There is also an 'Inactive Date' field with a calendar icon and a 'Description' field at the bottom.

Note: Administrator permission will not display any selectable permissions in the list, since the role comes with everything enabled.

1. For users that are not Administrators, the User Administration permission under Miscellaneous needs to be enabled:

Edit User

PermissionsServicesTokensBusiness Intelligence

Miscellaneous

NO

Company Setup

?

NO

Supervisor

?

YES

User Administration

?

NO

Export

?

NO

Quick Books

?

NO

Deliver All

?

NO

Deliver

?

NO

Financial

?

NO

Prevent Tag Creation

?

NO

Prevent Altering Taxable Status

?

NO

Customer User Add

?

Inventory

NO

Inventory

?

NO

Quick Add

?

NO

Manager

?

NO

Read

?

NO

Physical

?

Reports

NO

Financials

NO

Generals

Invoices

YES

View

NO

Add

NO

Edit

NO

Delete

Save

Cancel

Note: This permission will allow the user to manage all users and user roles.