Managely - New customer dealer setup (PM process)

07/16/2025 10:06 am EDT

Contents

Purpose

Before a new Managely customer implementation can begin, the customer must be set up in the Managely host as a dealer. This document walks through the steps to set up the initial dealer account.

This document provides guidance for the PM to create a customer dealer for the project only, and doesn't cover all of the additional settings, e.g., status as trial or suspended.

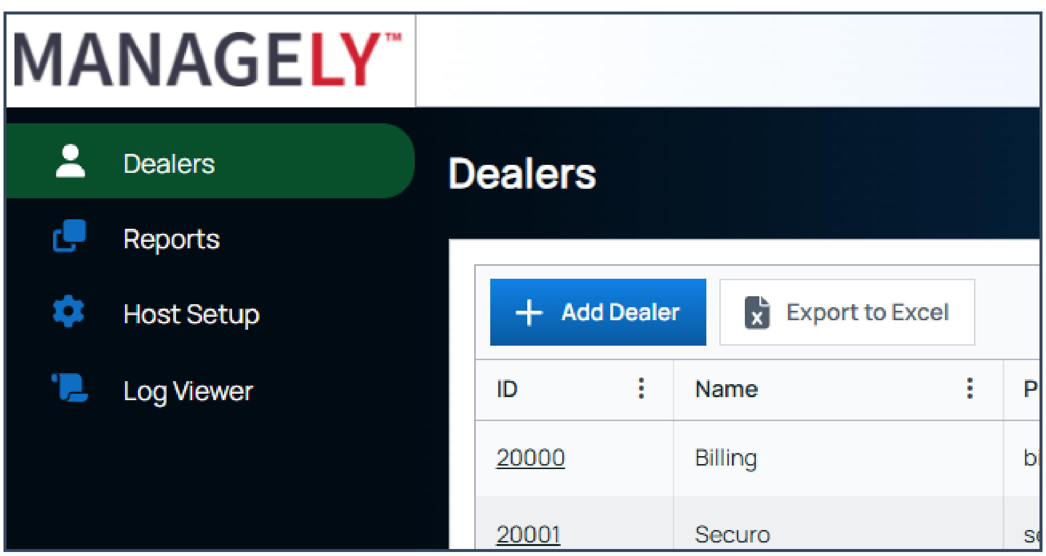
Note: The setup of a customer in Managely Host does NOT drive any customer billing activities at this time.

Return to Contents

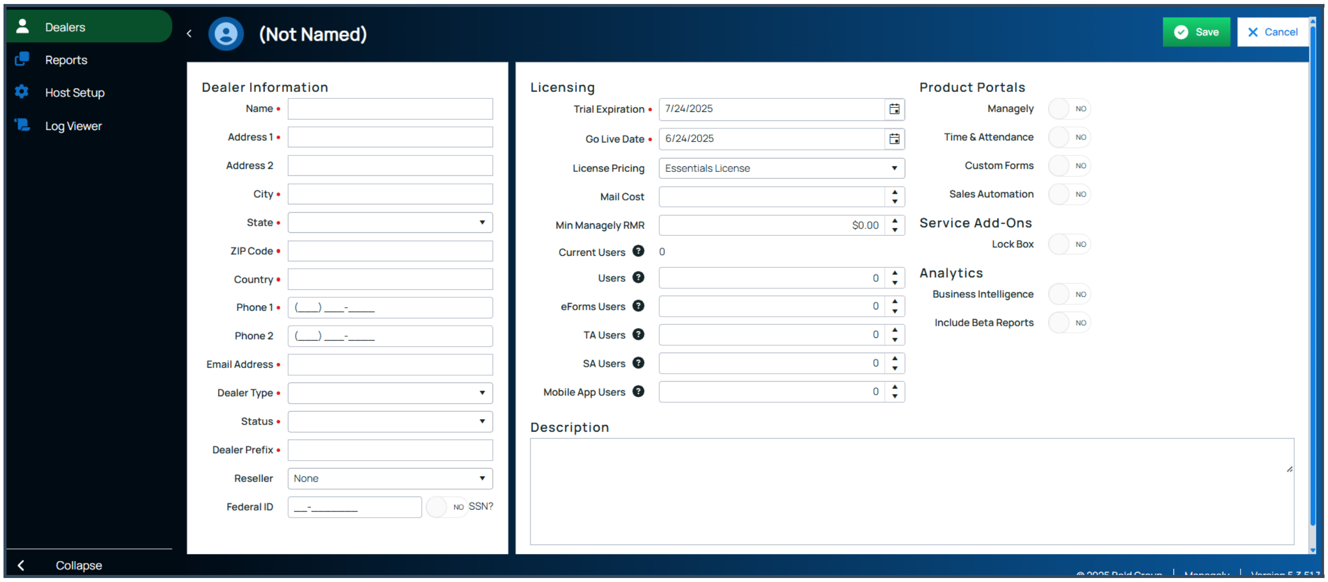
Process

The following steps are required to create the dealer in Managely host:

1. Log in to Managely Host: https://host.managelyapp.com.
2. Click Add Dealer.



Managely Add Dealer Screenshot:



1. Update the customer information:
    1. Name = customer name from Salesforce contract.
    2. Confirm that all Address fields are the same as the Salesforce address.
2. Enter Phone and Email information for the main contact person.
3. Dealer Type = Security.
4. Status = Active.
5. Dealer Prefix - this will be the customer's database prefix name that will be included in the customer's login URL.
    1. Must be unique - Use customer name.
    2. If an error is received that it is already in use, modify to a unique name.
6. Trial Expiration = Ignore this as the status is Active.
7. Go Live Date = Once the project go-live date is determined, this field should be updated.
8. License Pricing = The level of Managely customer purchased listed in the OAF.
    1. "Essentials" = Essentials.
    2. "Enterprise" = Pro.
    3. Enterprise Plus License = This option is not available.
9. Users = Total Managely users from the OAF, including additional users.
    1. Essentials = 1 user.
    2. Pro = 3 users.
10. Mobile App Users = Total Sedona-X users from the OAF.
    1. Each Managely user also has access to Sedona-X and should be added to the total of Mobile App users.
        - e.g. Essentials (1 user) plus 3 SedonaX = total of 4 SedonaX users (1 + 3).
        - e.g. Pro (3 users) + 3 additional licenses + 2 SedonaX = total of 8 SedonaX users (3 + 3 + 2).
11. Product Portals = Enable Managely, Customer Forms, and Sales Automation.
12. Time & Attendance = This should be enabled only if the customer is part of the Beta or after T&A is officially released.
13. Analytics = Enable Business Intelligence.
14. Save to generate a Managely host account.
15. Email the Managely host account details to the Billing and AR Manager - Christina Merenda, cmerenda@evercommerce.com.

Updating SalesForce

1. Copy the customer number generated.
2. Update the Salesforce account card, Managely Account # field:
    1. Paste the account number into the field.
    2. Add (host) after the account number as shown in the top row of the field below:
    3. The second row is the billing account number that the Accounting team will populate and will use to bill the customer.
    4. Save the record.

[Return to Contents]