

Assisting Clients with Portal Access & Billing Account Issues

11/03/2025 11:55 am EST

This article covers the steps to assist a customer when they need help accessing their account, updating payment methods, reviewing invoice history, or viewing open/closed bills.

Accessing the Internal Billing System

1. Navigate to **sobilling.managelyapp.com**
(This is the same URL customers use for their portal)
2. Use the search bar to locate the account:
 - Search by **account name**
 - **Account number**
 - Or select from **advanced search** in the dropdown
3. Click on the account once located.



Editing Customer Account Access

1. Click **Edit** (top right corner)



2. Key items in the account profile:

1. Registration Code

- Used by customers during first-time registration
- Appears at the bottom of the invoice
- Can be provided to the client anytime
- **NOTE:** [Reference Managely Billing Portal](#)

2. User List

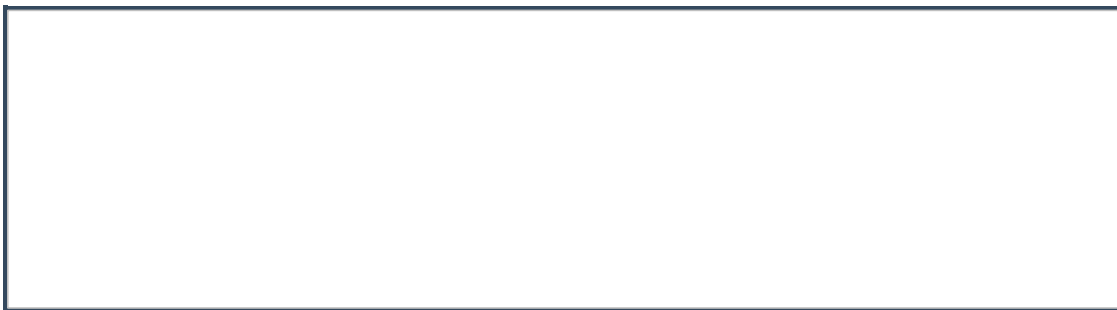
- Displays emails and users currently set up for portal access

3. Password Reset Option

- You can reset a customer's password if they are unable to log in
- After resetting, you must provide the temporary password to the user

4. Create User

- Click New Customer User to add a new portal login for a client if needed



Resetting a Customer's Password

1. Select the user having login issues

2. Click **Reset Password**



3. Confirm by selecting **Yes**

A large, empty rectangular box with a dark border, likely intended for a screenshot or a detailed description of the confirmation step.

4. Provide the customer with:

- Their username/email
- The temporary password Admin123! (The system will reset it to this)
- Instructions to reset their password upon login

A large, empty rectangular box with a dark border, likely intended for a screenshot or a detailed description of the information provided to the customer.