Assisting Clients with Portal Access & Billing Account Issues

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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**

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