QUICK START GUIDE

Getting started with N-able Passportal + Documentation Manager

N-ABLE™

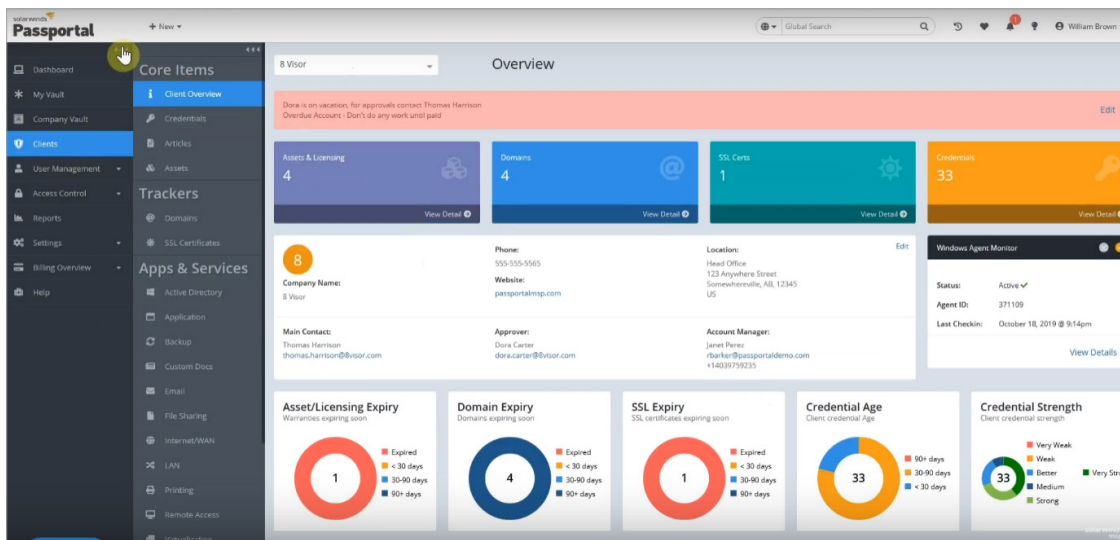# Table of Contents

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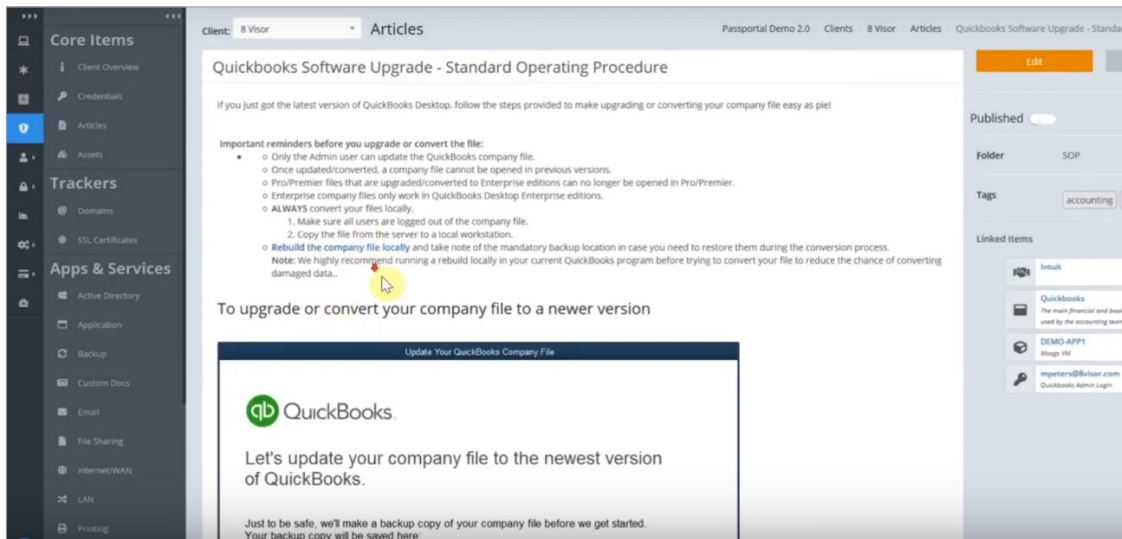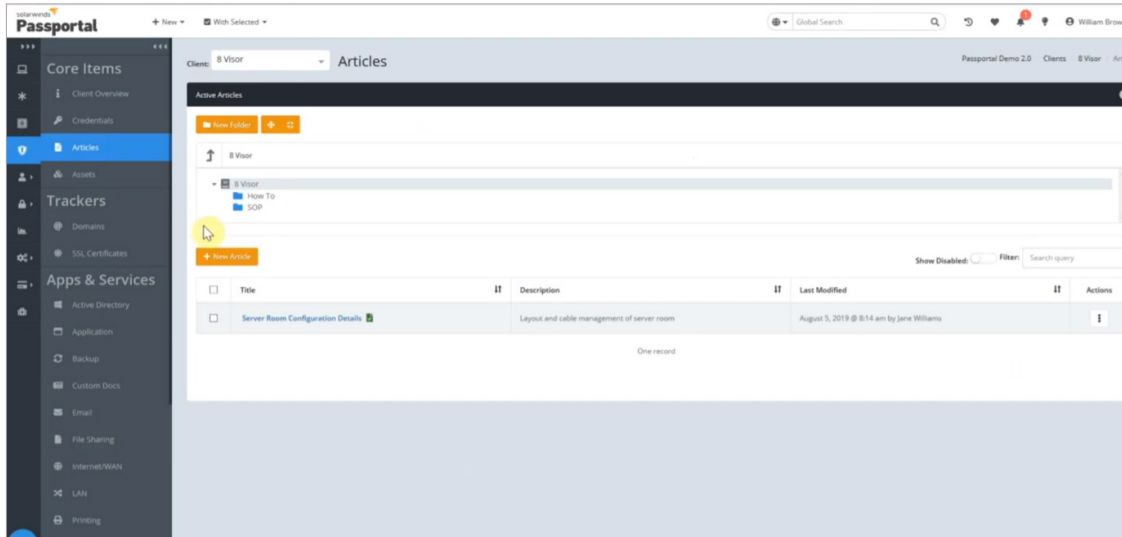Documentation Manager is an add-on feature to N-able™ Passportal and is only available to Passportal users.

How to start using passportal + documentation manager

After you've logged into your Passportal account, Documentation Manager is accessible through either your Client Vault or your **Company Vault,** where you'll find the **Core Items** menu.
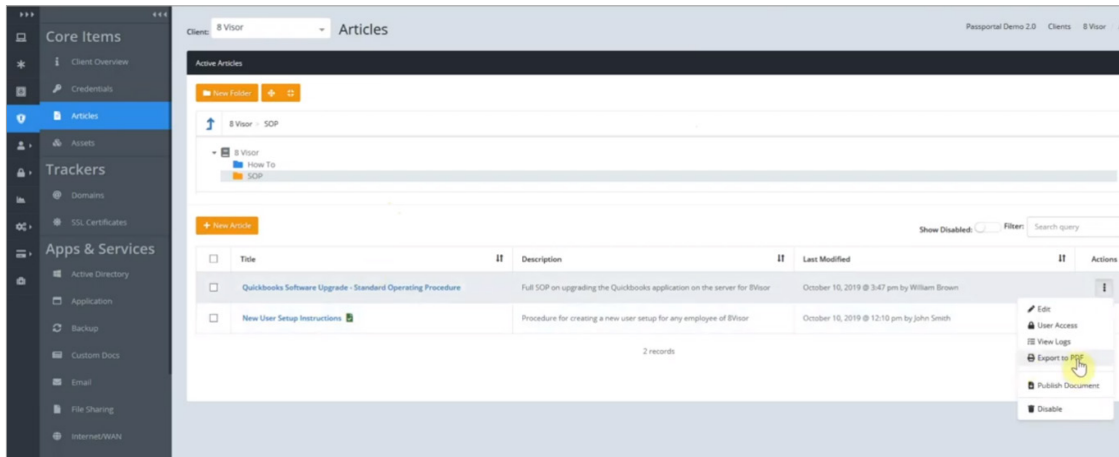
Articles

Here, you can create multiple articles for every client and organize them in a folder structure for easy access. The article allows HTML styling, link and image insertions, as well as tables.

Sharing articles with customers

Articles can be shared as PDFs, published online via a self-generated URL link (password-protected if needed), or downloaded via a runbook export for a specific client. Branding is kept current and visible in the exported articles.
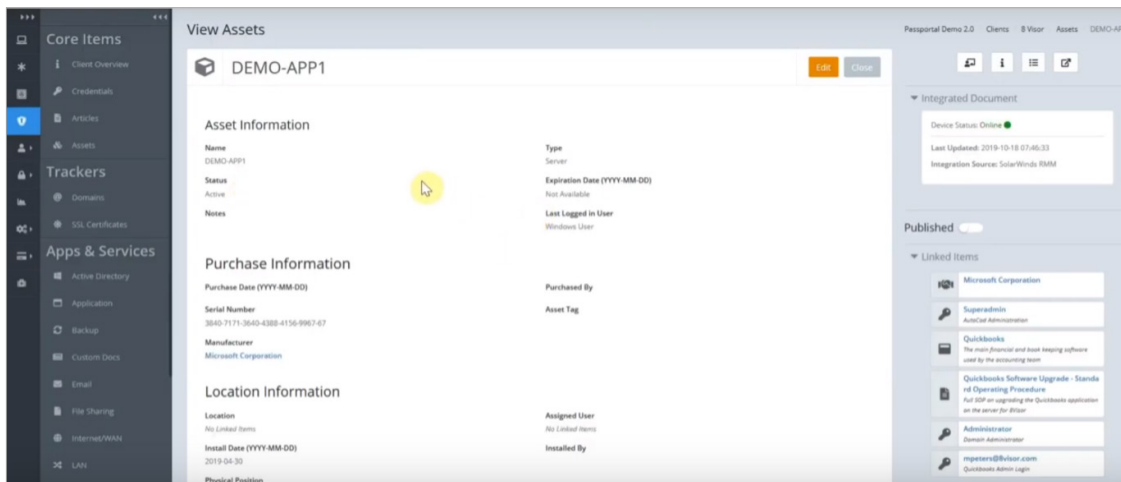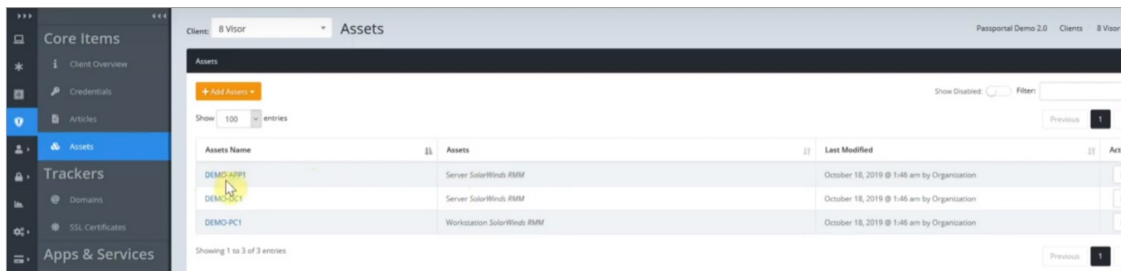
Assets

As part of the RMM integration, you can configure assets related to client information to be automatically imported into Passportal, as well as specify what information to capture.
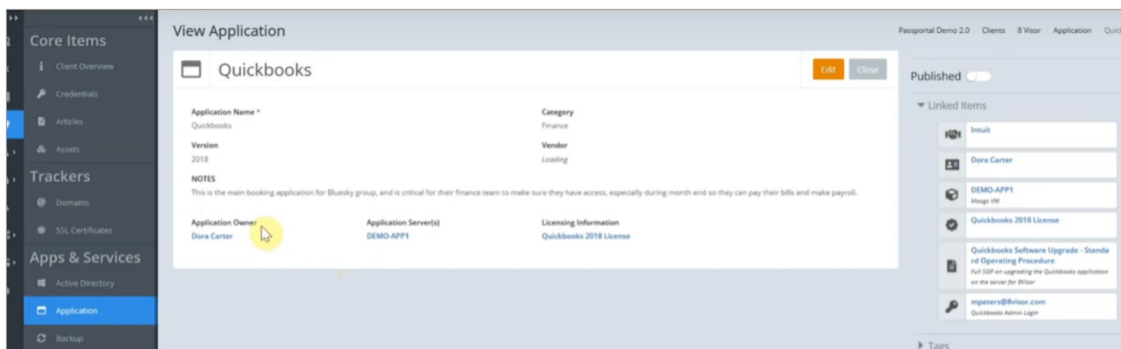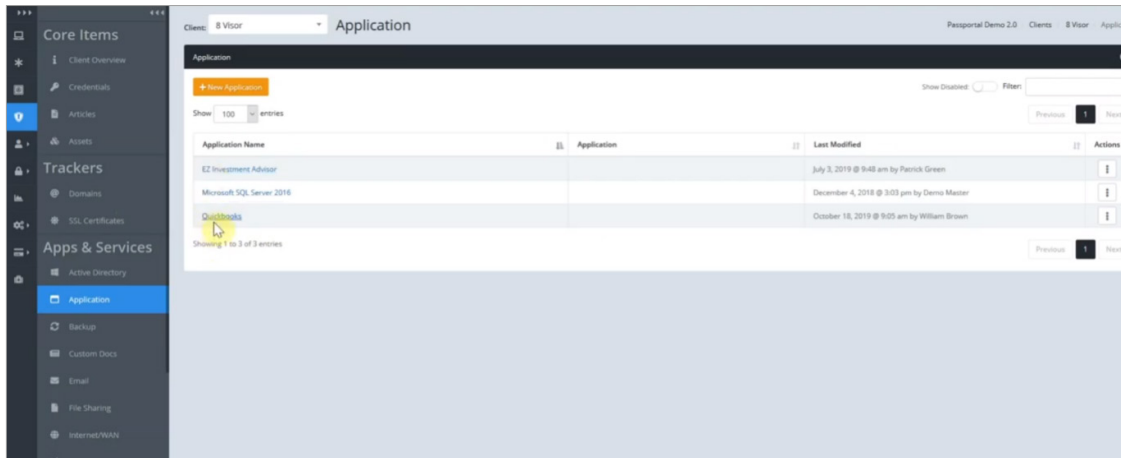
The software also allows assets to be manually added via the preloaded templates. All templates are customizable.

Passportal also provides the option to create any additional custom documents or templates needed for specific business requirements.
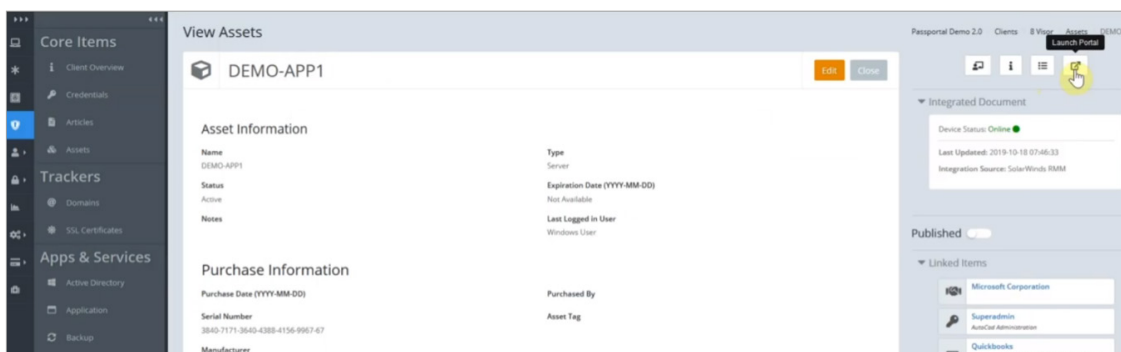
Apps and services

Passportal + Documentation Manager allows you to document all your apps and services and how they are configured in your clients' networks, as well as the option to use linked items.
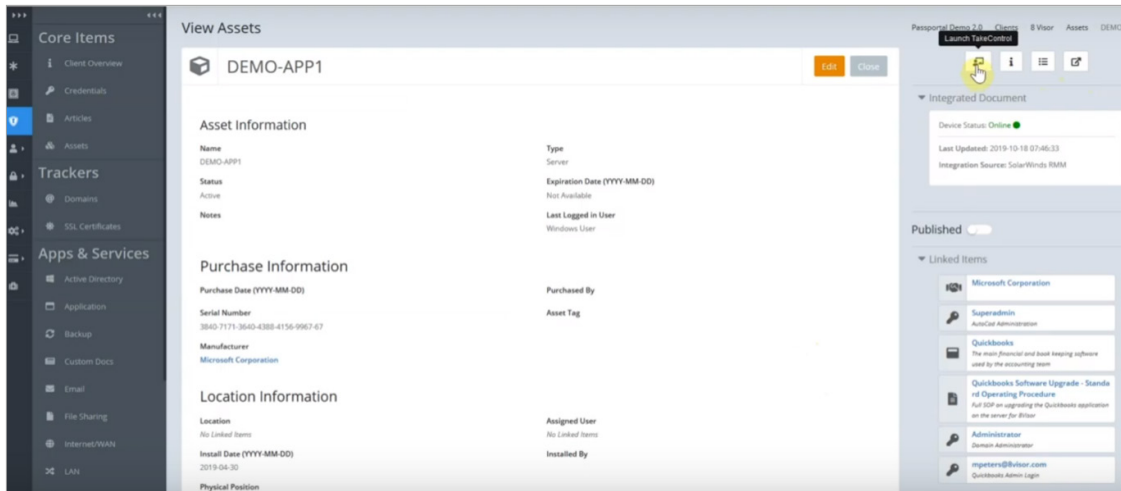

Launch RMM from the Passportal vault

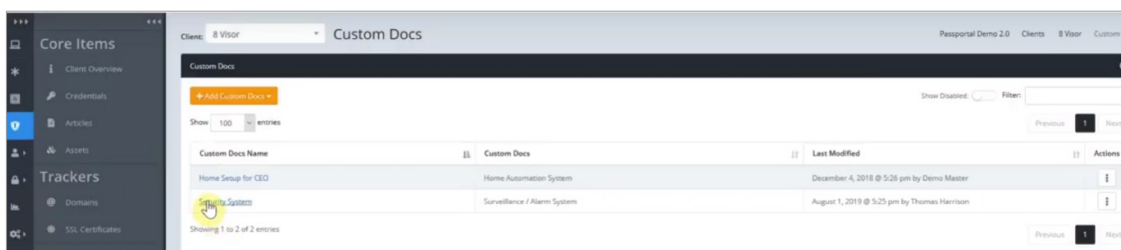In case you need to consult your integrated RMM portal, it can be launched directly from Passportal.

Launch Take Control from the Passportal vault

Once a customer's documentation has been identified, Passportal also allows you to launch the Take Control session directly from the system. This is designed for efficiency and fast customer support via any technician.
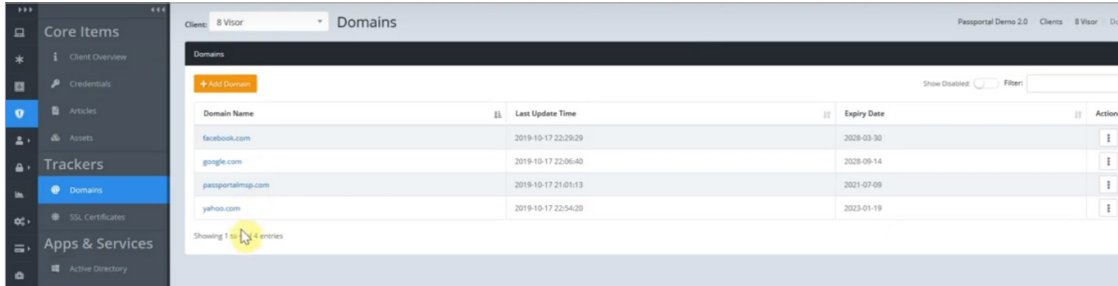

Create custom documents

Passportal + Documentation Manager is preloaded with templates designed to suit MSP best practices. However, as any business is different, all templates can be customized according to your individual needs and used to document various other apps and services.

Tracking domains and SSLs

Tracking domains and SSLs is also possible for an overview into any of your clients' domains or SSL records or expiry dates.

Files

Any files can be uploaded and linked to any applications stored in your Passportal.

Try it free

30 days, full version

Proper documentation helps drive efficiency in business

Want to learn more? Email info@passportal.com or call us +1-888-870-7840 today.