# How to Set the Default Fields

- 1. Log in as Admin user
- 2. On user's menu panel, go to System Manager menu then click Company Configuration
- 3. On System Manager panel, type the currency or select a value on the Functional Currency and Reporting Currency combo boxes
- 4. Type the country on the Country combo box or select from the list
- 5. Select an Environment Type to change the header color depending in the environment of app
  - a. Environment type colors:

Production							
iRely LLC Demo Environment	Filter Menu Q	🔝 Screens 1	Notifications 17	🗐 Activities 💈	Recent	1	IRELY ADMIN
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iRely LLC Demo Environment (Test Company)	Filter Menu Q	🔟 Screens 1	Notifications 17	🗐 Activities 2	🔊 Recent	1	IRELY ADMIN
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iRely LLC Demo Environment (Non-Production)	Filter Menu Q	🔝 Screens 1	Notifications 17	🗐 Activities 💈	Recent	1	IRELY ADMIN

- 6. Select a Currency Decimals from 0 6. This will configure all decimals in the system. If the currency decimal value is 4 then all screen will show up to 4 decimals, unless this setup is overridden.
- 7. Select a default Terms, this will be the default term for vendor entities created from a different entity.
- 8. Select the Report Date Format, all dates in the report viewer/screen will show on the selected format, unless overridden
  - a. MM/dd/yyyy this is the default value
    - b. M/d/yyyy
    - c. M/d/yy
    - d. MM/dd/yy
    - e. yy/MM/dd
    - f. yyyy/MM/dd
    - g. dd/MM/yyyy
- Select the Report Number Format, all numbers in the report viewer/screen will show on the selected format, unless overridden

   1,234,567.89 this is the default value
  - b. 1.234.567,89
- 10. Click **Save** button to implement the setup
- 11. Or click the Done button to save and close the screen

Company Configuration							×
Done Save Close							
Multi-Company	System Manager Keyboard	Shortcuts Audit Log	Attachm	ent			
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Ticket Management	Terms	Net 30	~				
Contract Management	Report Date Format	MM/dd/yyyy	~				
Risk Management	Report Number Format	1,234,567.89	~				
t - states							



Saved currency and country will be used as defaults on all modules.

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3. On System Manager panel, type the currency or select a value on the Functional Currency and Reporting Currency combo boxes

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5. Select an Environment Type to change the header color depending in the environment of app

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6. Click Ok button to implement the setup

- Log in as Admin user
   On user's menu panel, go to System Manager folder then click Company Configuration
   On System Manager panel, type the currency or select a value on the Functional Currency and Reporting Currency combo boxes

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5. Select an Environment Type to change the header color depending in the environment of app

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6. Click Ok button to implement the setup

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   On System Manager panel, type the currency or select a value on the Functional Currency and Reporting Currency combo boxes

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			Singapore		

5. Select an Environment Type to change the header color depending in the environment of app

System Manager       Audit Log (1)       Attachment (0)         Tank Management       Origin Integration:       Source System:       Summit         Purchasing       Default Fields       Default Accounting Method         Heip Desk       Notes Receivable       Courrency:       USD         Contract Management       Performation Currency:       USD       Accrual       Cash         Payroll       Courtry:       Philippines       Cash       Cash         Card Fueling       Environment Type:       Test       Performage       From Test         Patronage       Month End       From Name:       Rely Onher       Month End         SMTP Server:       smtp.outlook.com       SMTP Server:       Smtp.outlook.com         SMTP Server:       Smtp.outlook.com       SMTP Por:       S87       Environment Type:         Company Setup       Company Setup       From       Password:       From         Integration (Default)       Company Setup       Com       Com       Environment         Integration (Default)       Com       Com       Com       Com       Com         Strip CompanySeture       Com       Com       Com       Com       Com       Com         Default CompanySeture       Com <th>Company Configuration</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>^</th> <th>×</th>	Company Configuration										^	×
Grain Card Fueling Transports Tax Form Patronage From Email: autos: From Email: autos: From Name: Rely Outle SMTP Server: smtp.outlook.com SMTP Server: SMTP. Server: Smtp.outlook.com SMTP Port: 587 Encrypted Connection: TLS Requires Authentication Username: autosupport@irely.com Company Setup Company Setup Tax Company Setup Company Setup Company Setup Tax Company Setup Company Setup Com	OK Cancel System Manager Tank Management Sales Purchasing Help Desk Notes Receivable Contract Management Payroll Risk Management	System Manager Origin Integrati Default Fields Functional Currency: Reporting Curr Country:	· Audion:	dit Log (1) Atta	chment (0,	>	Summit Default Accor Accrual Cash	inting	Metl	hod		ſ
Company Setup Company(Source) Company Setup Company(Source) Company Setup Company(Source) Company Setup Company(Source) (Test Company) Company Setup	Grain Card Fueling Transports Tax Form Patronage	Environment T SMTP Email Se From Email: From Name: SMTP Server: SMTP Port: Requires Au Username:	Type: ttings autos iRely I smtp. 587 uthenti autos	Test Environment Ty Production Test Month End Other outlook.com En ication	rpe crypted C m	Conne	ction: TLS word:					
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121 Demo Setup Company(Source) (Test Company)       Q Search       Image: Company (Source) (Test Company)       Image: Company (Source) (Test Company	Troduction (Default)  It uses the production (Default) It uses the production (Default) It uses the production of the p					Q	Search	9.1	. 🛛	9	⊕ Logout	-
	I21 Demo Setup Company(Source) (Test Company)         Wonth End         I21 Demo Setup Company(Source) (Month End)         Other					Q	Search	4) I		<b>P</b>	⊕ Logout	10

# 6. Click Ok button to implement the setup

- Log in as Admin user
   On user's menu panel, go to System Manager folder then click Company Preferences
   On System Manager panel, type the currency or select a value on the Functional Currency and Reporting Currency combo boxes

System Manager	Origin Integratio	on:	Source System:	Su	nmit	~
Tank Management	Default Fields				Default Accounting	Method
Sales	Derdale Freids				Derduit Accounting	riction
Help Desk	Functional Cu	rrency:	РНР	~	Accrual	
Inventory	Reporting Cur	rency:	Functional Currency		Description	
Contract Management	Country:		GBP		United Kingdom	Pounds
Pavroll	Environment	Type	PHP		Philippines Peso	
Risk Management	Environment	rype.	JPY C		Japan Yen	
Grain	SMTP Email Sett	inas	USD		US Dollar	
Transports			CAD		Canadian Dollar	
	From Email:	i21tes	t		Australian Dollar	
	From Name:	test co	ompany			
	SMTP Server:	smtp.c	gmail.com			
	SMTP Port	597	Encounted (	Connecti	on: TIS	v
	SHIF FOR	507	Encrypted v	connecti	011. 1125	
	Requires A	uthentic	ation			
Company Preferences	Vsername:	i21tes	ation tcompany@gmail.com	Passw	vord:	
Company Preferences	✓ Requires A Username:	i21test	ation tcompany@gmail.com	Passw	rord:	
Company Preferences	Requires Al     Username:	uthentic.	ation tcompany@gmail.com	Passw	nord:	
Company Preferences	Requires Al     Username:     Origin Integration     Default Fields	uthentic.	ation tcompany@gmail.com	Passw	mmit	<b>▼</b> g Method
Company Preferences	Crigin Integration     Default Fields	on: [	ation tcompany@gmail.com	Passw	mmit	<b>y</b> g Method
Company Preferences	Crigin Integration     Default Fields     Functional Cu	on: [	ation tcompany@gmail.com	Passw Su	mmit Default Accounting  Accrual	y g Method
Company Preferences	Requires Ai     Username:     Origin Integration     Default Fields     Functional Cu     Reporting Cui	on: [ urrency: rrency:	ation tcompany@gmail.com	Passw Su	mmit Default Accounting  Accrual  Cash	y g Method
Company Preferences	Requires Al Username:     Origin Integration     Default Fields     Functional Cu Reporting Cun Country:	on: [ urrency: rrency:	ation tcompany@gmail.com	Passw Su	mmit Default Accounting  Accrual Cash Description	▼ g Method
Company Preferences OK Cancel System Manager Tank Management Sales Help Desk Inventory Notes Receivable Contract Management Payroll	Requires Al Username:      Origin Integration     Default Fields     Functional Cu Reporting Cur Country:     Environment	uthentic i21test on: [ irrency: rrency: Type:	ation tcompany@gmail.com Source System: PHP USD Reporting Currency GBP	Passw Su	mmit Default Accounting Accrual Cash Description United Kingdom	g Method Pounds
Company Preferences OK Cancel System Manager Tank Management Sales Help Desk Inventory Notes Receivable Contract Management Payroll Risk Management	Requires Al Username:      Origin Integration     Default Fields     Functional Cu Reporting Cur Country:     Environment	uthentic i21test on: [ urrency: rrency: Type:	ation tcompany@gmail.com Source System: PHP USD Reporting Currency GBP PHP	Passw Su	mmit Default Accounting	g Method
Company Preferences OK Cancel System Manager Tank Management Sales Help Desk Inventory Notes Receivable Contract Management Payroll Risk Management Grain	Requires Au Username:      Origin Integration     Default Fields     Functional Cu Reporting Cu Country: Environment     SMTP Email Set	uthentic i21test on: [ urrency: Type: tings	ation tcompany@gmail.com Source System: PHP USD Reporting Currency GBP PHP JPY	Passw Su	mmit Default Accounting  Accrual Cash Description United Kingdom Philippines Peso Japan Yen	g Method
Company Preferences OK Cancel System Manager Tank Management Sales Help Desk Inventory Notes Receivable Contract Management Payroll Risk Management Grain Transports	Requires Al Username:     Origin Integration     Default Fields     Functional Cu Reporting Cur Country:     Environment     SMTP Email Set	uthentic [21test on: [ Irrency: Type: Type: tings	ation tcompany@gmail.com Source System: PHP USD Reporting Currency GBP PHP JPY USD CAD ChD ChD ChD ChD ChD ChD ChD ChD ChD Ch	Passw Su	mmit Default Accounting	g Method
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Company Preferences OK Cancel System Manager Tank Management Sales Help Desk Inventory Notes Receivable Contract Management Payroll Risk Management Grain Transports	Requires Al Username:     Username:     Origin Integration Default Fields     Functional Cu Reporting Cur Country: Environment     SMTP Email Set From Name: SMTP Server:	uthentic [21test on: [ urrency: Type: tings [21test test co smtp.]	ation tcompany@gmail.com Source System: PHP USD Reporting Currency GBP PHP JPY USD CAD CAD AUD gmail.com	Su Y	mmit Default Accounting	g Method

System Manager	
Tank Management	Orgin Integration: V Source system: Summit
Sales	Default Fields Default Accounting Method
Help Desk	Functional Currency: PHP
Inventory	
Notes Receivable	Reporting Currency: USD
Contract Management	Country: Philippines 💙
Payroll	Environment Type: Country
Risk Management	Papua New Guinea
Grain	SMTP Email Settings Paraguay
Transports	Peru
	From Email: i21test Philippines
	From Name: test co Poland
	SMTP Server: smtp.g Portugal
	Puerto Rico
	SMTP POIL: 587 Qatar
	Requires Authentica Romania
	Username: i21test Russia
	Rwanda
	Electronic Pricing Options Saudi Arabia
	Canaal

ystem Manager	Origin Integration	n: [	Source System:	Su	ummit	*		
ank Management	Default Fields				Default Accountin	g Method		
ales								
leip Desk	Functional Curr	rency:	PHP	~	Accrual			
nventory	Reporting Curr	ency:	USD	v	Cash			
lotes Receivable	Countra		Dhilipping	×				
Contract Management	Country:		Philippines					
Payroll	Environment T	ype:	Test	*				
Risk Management			Environment Type					
Grain	SMTP Email Settin	ngs	Production					
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	Username:	i21tes	tcompany@gmail.com	Pass	word: •••••			
vironment type colors: oduction Iy i21 - iRely Grain and Ag Co							2	ADMIN ~
st								
51								

6. Click  $\mathbf{Ok}$  toolbar button to implement the setup

Log in as Admin user
 On user's menu panel, go to System Manager folder then click Company Preferences

# 3. On System Manager panel, type the currency on the Currency combo box or select from the list

OK Cancel								
System Manager	Origin Integratio	on: 🔽						
Tank Management	Defeult Cielde			Defe				
ashboard	Default Fields			Dera	ault Accountin	ig Method		
ccounts Receivable	Currency:	PHP	×	0	Accrual			
ccounts Payable	Country	Currency			Descriptio	n		١
otes Receivable	country.	TST						1
ontract Management		GBP			United Kir	nadom Pounds		ł
rain	SMTP Email Set	PHP .			Philippine	s Peso		t
ard Fueling	From Email:	JPY (hŋ			Japan Yer	1		1
	En en Neren	USD			US Dollar			1
	From Name:	CAD			Canadian	Dollar		1
	SMTP Server:	AUD			Australiar	n Dollar		1
	SMTP Port:	587	Encryp	oted C	onnection:	TLS	¥	ſ
	Requires A	uthentication						
	Username:	i21testcompany@g	mail.con	n	Password:	•••••		
	Electronic Pricin	g Options						
	Interface Syst	em:					¥	
	Quoting Syste	em Batch User ID:						1
	Quoting Syste	em Batch User Passwo	rd:					
😟 💡 Edited								

4. Type the country on the Country combo box or select from the list

vstem Manager	Origin Integratio	on: 🔽		
ank Management	Default Fields		Default Accounting Method	
ashboard ccounts Receivable	Currency:	PHP	Accrual	
otes Receivable	Country:	Philippines 👻	Ocash	
ontract Management		Country		
rain	SMTP Email Sett	Qatar		-
ard Fueling	From Email: From Name:	Puerto Rico Portugal Poland		
	SMTP Server: SMTP Port:	Philippines Peru Paraguay		
	Username:	Papua New Guinea Panama Palau		
	Electronic Pricin	Pakistan		
	Interface Syst	Oman Norway		-
		m Batch Llear ID:		

5. Click Ok toolbar button to save the setup

1. From Admin folder, double click Company Preferences

2. On Settings panel, select the Currency from Currency combo box

Company Preferences						* ×
OK Cancel						
Options	Origin Integrati	on: 🔽				
Settings	Default Fields				Default Accounting Method	
Dashboard Option	berduic rields				berdare Accounting Fleenou	
Accounts Payable	Currency:	PHP	~		Accrual	
Notes Receivable	Country	Filter Records		>	<	
Contract Management	Country.	Currency			Description	
Accounts Receivable	SMTP Email Set	t CBD			Lipited Kingdom Dounds	
Tank Management	Sinn Entan Sec	GBP			Dhilipping Deep	
	From Email:	PHP fm			Philippines Peso	
	From Namo:	JPY (			Japan Yen	
	FIOIII Maine.	USD			US Dollar	
	SMTP Server:	CAD			Canadian Dollar	
	SMTP Port:	AUD			Australian Dollar	
	Requires A	Authentication				
	Username:	0			Password:	

Select the Country from Country combo box

Company Preferences			8	٤×
OK Cancel				
Options	Origin Integratio	on: 🔽		
Settings	Default Fields		Default Accounting Method	
Dashboard Option				
Accounts Payable	Currency:	PHP	Accrual     Accrual	
Notes Receivable	Country:	Philippines 💌	🔘 Cash	
Accounts Receivable		Filter Records	×	
Tank Management	SMTP Email Sett	Country		
	From Email:	Spain		
	From Name	Singapore		
	CMTD Commen	Puerto Rico		
	SMTP Server:	Portugal		
	SMTP Port:	Poland		
	🔽 Requires A	Philippines		
	Username:	Peru (m)		
		Paraguay 🛁		
		Papua New Guinea		
		Panama		
•			•	
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4. Click Ok toolbar button to save the setup