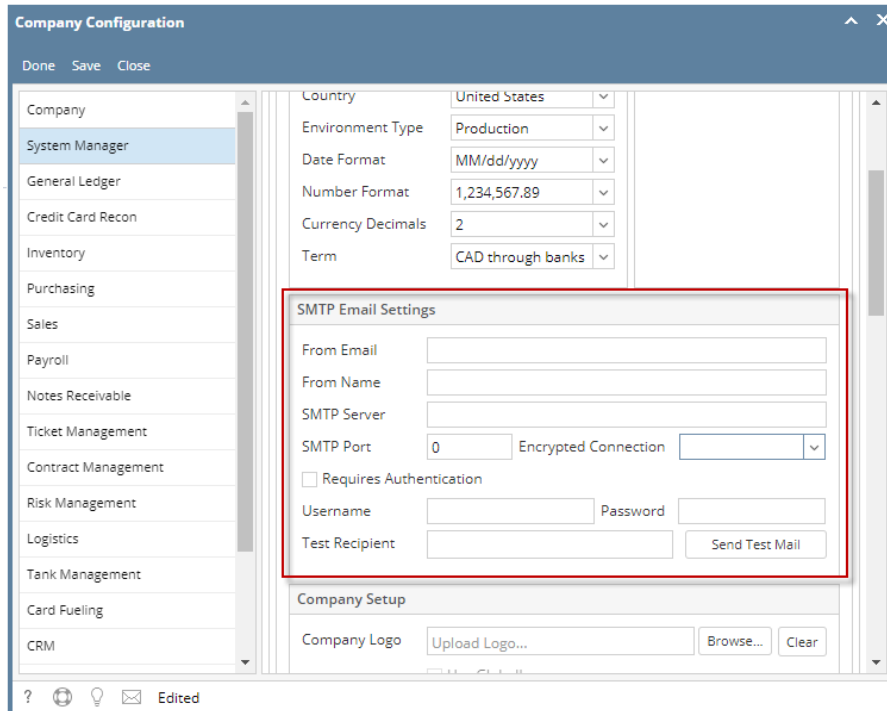


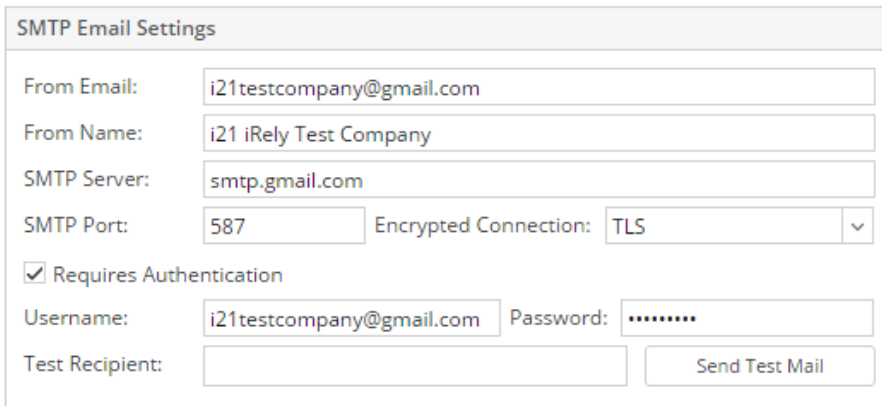
How to Setup SMTP Email Settings

This section is used as the mail sender details for the whole application.

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**
3. On **System Manager** panel, add the necessary details on **SMTP Email Settings** part:



The screenshot shows the 'Company Configuration' window. On the left is a sidebar with a tree view containing 'Company', 'System Manager', 'General Ledger', 'Credit Card Recon', 'Inventory', 'Purchasing', 'Sales', 'Payroll', 'Notes Receivable', 'Ticket Management', 'Contract Management', 'Risk Management', 'Logistics', 'Tank Management', 'Card Fueling', and 'CRM'. The 'System Manager' folder is expanded, and 'Company Configuration' is selected. The main area shows various configuration fields. A red rectangle highlights the 'SMTP Email Settings' section, which includes fields for 'From Email', 'From Name', 'SMTP Server', 'SMTP Port', 'Encrypted Connection', a checkbox for 'Requires Authentication', 'Username', 'Password', and 'Test Recipient'. Below this is the 'Company Setup' section with a 'Company Logo' field and buttons for 'Upload Logo...', 'Browse...', and 'Clear'.



This is a detailed view of the 'SMTP Email Settings' form. It contains the following fields and values:

- From Email:** i21testcompany@gmail.com
- From Name:** i21 iRely Test Company
- SMTP Server:** smtp.gmail.com
- SMTP Port:** 587
- Encrypted Connection:** TLS
- Requires Authentication:** ☒
- Username:** i21testcompany@gmail.com
- Password:** (masked with dots)
- Test Recipient:** (empty field)
- Buttons:** 'Send Test Mail'

- a. **From Email** - alphanumeric (email format - validate on save)
 - b. **From Name** - alphanumeric
 - c. **SMTP Server** - type of protocol use for the email
 - d. **SMTP Port** - Port number of the SMTP server
 - e. **Encrypted Connection** - Can be SSL, TLS or None
 - f. **Requires Authentication** - Yes or No
 - g. **Username** - Email address
 - h. **Password** - Password of the email
4. Click **Done** or **Save** toolbar button to save the settings.

- a. To test if the SMTP Email Settings has been properly configured, enter an email address on the Test Recipient field

SMTP Email Settings

From Email:

From Name:

SMTP Server:

SMTP Port: Encrypted Connection: ▼

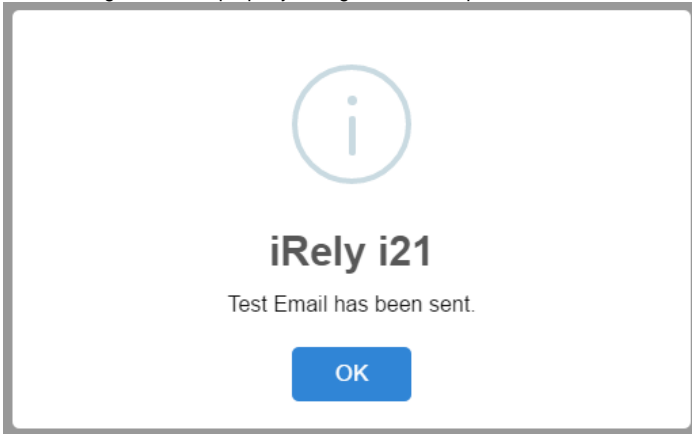
☒ Requires Authentication


Username: Password:

Test Recipient:

- b. Click **Send Test Mail** button

- c. If the Settings has been properly configured, the recipient will receive a test email



 Refer to these topics if you need to email an invoice report.

- [How to Setup Email Distribution](#)
- [How to Email Invoice](#)
- [How to Batch Email Reports](#)

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**

3. On **System Manager** panel, add the necessary details on **SMTP Email Settings** part:

Company Configuration

OK Cancel

System Manager

General Ledger

Credit Card Recon

Inventory

Purchasing

Sales

Payroll

Notes Receivable

Ticket Management

Contract Management

Risk Management

Logistics

Tank Management

Card Fueling

CRM

Help Desk

Environment Type: Test

Date Format: MM/dd/yyyy

Number Format: 1,234,567.89

Currency Decimals: 2

SMTP Email Settings

From Email:

From Name:

SMTP Server:

SMTP Port: 0 Encrypted Connection:

☐ Requires Authentication

Username: Password:

Test Recipient: Send Test Mail

Company Setup

Company Logo: Upload Logo... Browse... Clear

☐ Use Globally

EIN: 11111 Tax ID:

SMTP Email Settings

From Email: i21testcompany@gmail.com

From Name: i21 iRely Test Company

SMTP Server: smtp.gmail.com

SMTP Port: 587 Encrypted Connection: TLS

☒ Requires Authentication

Username: i21testcompany@gmail.com Password:

Test Recipient: Send Test Mail

- a. **From Email** - alphanumeric (email format - validate on save)
- b. **From Name** - alphanumeric
- c. **SMTP Server** - type of protocol use for the email
- d. **SMTP Port** - Port number of the SMTP server
- e. **Encrypted Connection** - Can be SSL, TLS or None
- f. **Requires Authentication** - Yes or No
- g. **Username** - Email address
- h. **Password** - Password of the email
4. Click **Ok** toolbar button to save the settings.
- a. To test if the SMTP Email Settings has been properly configured, enter an email address on the Test Recipient field

SMTP Email Settings

From Email: i21testcompany@gmail.com

From Name: i21 iRely Test Company

SMTP Server: smtp.gmail.com

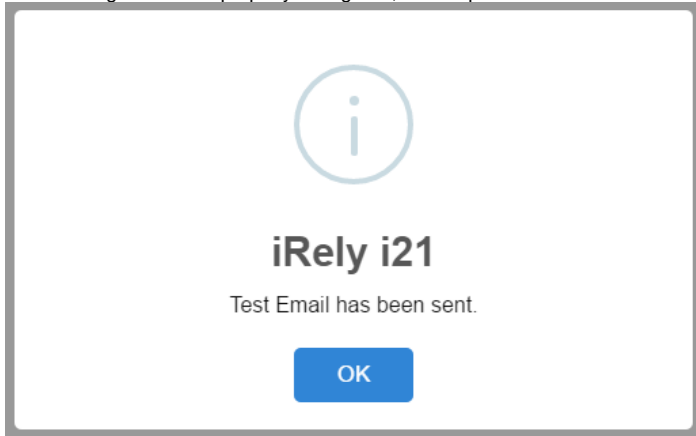
SMTP Port: 587 Encrypted Connection: TLS

☒ Requires Authentication

Username: i21testcompany@gmail.com Password:

Test Recipient: beth.delapaz@irely.com Send Test Mail

- b. Click **Send Test Mail** button
- c. If the Settings has been properly configured, the recipient will receive a test email



1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**
3. On **System Manager** panel, add the necessary details on **SMTP Email Settings** part:

 A screenshot of the 'Company Configuration' window. On the left is a sidebar menu with 'System Manager' selected. The main area is divided into sections: 'Default Fields' (Functional Currency: USD, Reporting Currency: USD, Country: United States, Environment Type: Production), 'Default Accounting Method' (Accrual selected), and 'SMTP Email Settings' (highlighted with a red border). The SMTP settings include fields for From Email, From Name, SMTP Server, SMTP Port (0), Encrypted Connection (dropdown), a checked 'Requires Authentication' checkbox, Username, Password, and Test Recipient fields. A 'Send Test Mail' button is at the bottom right of the SMTP section. Below this is the 'Company Setup' section with a 'Company Logo' field and a 'Use Globally' checkbox.

 A zoomed-in view of the 'SMTP Email Settings' section. The fields are filled with the following values: 'From Email' is 'i21testcompany@gmail.com', 'From Name' is 'i21 iRely Test Company', 'SMTP Server' is 'smtp.gmail.com', 'SMTP Port' is '587', 'Encrypted Connection' is 'TLS', 'Requires Authentication' is checked, 'Username' is 'i21testcompany@gmail.com', and 'Password' is masked with dots. The 'Test Recipient' field is empty. A 'Send Test Mail' button is located to the right of the Test Recipient field.

- a. **From Email** - alphanumeric (email format - validate on save)
- b. **From Name** - alphanumeric
- c. **SMTP Server** - type of protocol use for the email

- d. **SMTP Port** - Port number of the SMTP server
 - e. **Encrypted Connection** - Can be SSL, TLS or None
 - f. **Requires Authentication** - Yes or No
 - g. **Username** - Email address
 - h. **Password** - Password of the email
4. Click **Ok** toolbar button to save the settings.
- a. To test if the SMTP Email Settings has been properly configured, enter an email address on the Test Recipient field

SMTP Email Settings

From Email: i21testcompany@gmail.com

From Name: i21 iRely Test Company

SMTP Server: smtp.gmail.com

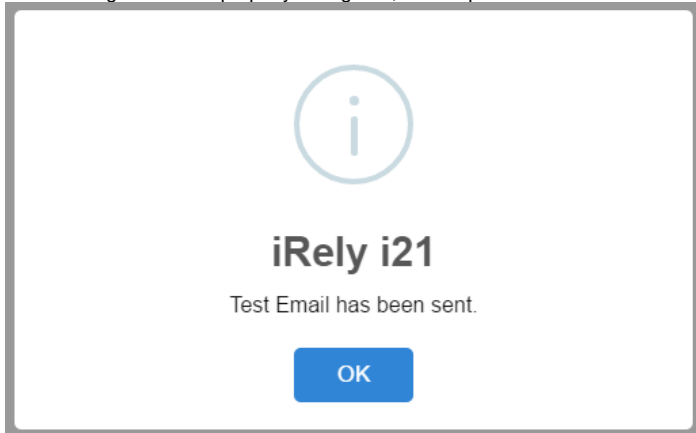
SMTP Port: 587 Encrypted Connection: TLS

☒ Requires Authentication

Username: i21testcompany@gmail.com Password:

Test Recipient: beth.delapaz@irely.com **Send Test Mail**

- b. Click **Send Test Mail** button
- c. If the Settings has been properly configured, the recipient will receive a test email



- 1. Log in as **Admin user**
- 2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**

3. On **System Manager** panel, add the necessary details on **SMTP Email Settings** part:

Company Configuration

OK Cancel

System Manager

Tank Management

Sales

Purchasing

Help Desk

Notes Receivable

Contract Management

Payroll

Risk Management

Grain

Logistics

Card Fueling

Transports

Motor Fuel Tax Forms

Patronage

CRM

Functional Currency: USD

Reporting Currency: PHP

Country: United States

Environment Type: Test

Accrual

Cash

SMTP Email Settings

From Email:

From Name:

SMTP Server:

SMTP Port: 0 Encrypted Connection:

☒ Requires Authentication

Username: Password:

Test Recipient: Send Test Mail

Company Setup

Company Logo: Change Logo... Browse... Clear

EIN: 001

Company ID: 1

Company Name: i21 iRely Test Company

Address: 4242 Flagstaff Cove

Zip Code: 99926

Edited

SMTP Email Settings

From Email: i21testcompany@gmail.com

From Name: i21 iRely Test Company

SMTP Server: smtp.gmail.com

SMTP Port: 587 Encrypted Connection: TLS

☒ Requires Authentication

Username: i21testcompany@gmail.com Password:

Test Recipient: Send Test Mail

- a. From Email - alphanumeric (email format - validate on save)
 - b. From Name - alphanumeric
 - c. SMTP Server - type of protocol use for the email
 - d. SMTP Port - Port number of the SMTP server
 - e. Encrypted Connection - Can be SSL, TLS or None
 - f. Requires Authentication - Yes or No
 - g. Username - Email address
 - h. Password - Password of the email
4. Click **Ok** toolbar button to save the settings.

- a. To test if the SMTP Email Settings has been properly configured, enter an email address on the Test Recipient field

SMTP Email Settings

From Email:

From Name:

SMTP Server:

SMTP Port: Encrypted Connection: ▼

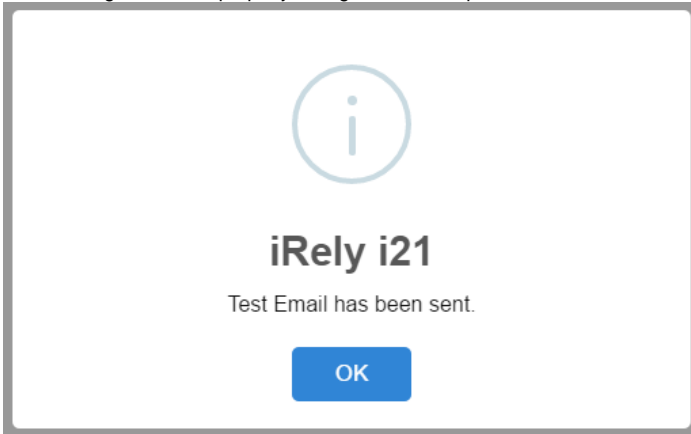
☒ Requires Authentication

Username: Password:

Test Recipient:

- b. Click **Send Test Mail** button

- c. If the Settings has been properly configured, the recipient will receive a test email



1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**

3. On **System Manager** panel, add the necessary details on **SMTP Email Settings** part:

The screenshot shows the 'Company Configuration' dialog box with the 'System Manager' tab selected. The 'SMTP Email Settings' section is highlighted with a red box. The settings are as follows:

System Manager	
Origin Integration:	<input checked="" type="checkbox"/>
Source System:	Summit
Default Fields	
Functional Currency:	PHP
Reporting Currency:	USD
Country:	Philippines
Environment Type:	Test
Default Accounting Method	
<input checked="" type="radio"/> Accrual	
<input type="radio"/> Cash	
SMTP Email Settings	
From Email:	
From Name:	
SMTP Server:	
SMTP Port:	0
Encrypted Connection:	
<input type="checkbox"/> Requires Authentication	
Username:	
Password:	

The screenshot shows the 'SMTP Email Settings' dialog box with the following values filled in:

SMTP Email Settings	
From Email:	i21testcompany@gmail.com
From Name:	i21testcompany
SMTP Server:	smtp.gmail.com
SMTP Port:	587
Encrypted Connection:	TLS
<input checked="" type="checkbox"/> Requires Authentication	
Username:	i21testcompany@gmail.com
Password:	*****

- From Email - alphanumeric (email format - validate on save)
 - From Name - alphanumeric
 - SMTP Server - type of protocol use for the email
 - SMTP Port - Port number of the SMTP server
 - Encrypted Connection - Can be SSL, TLS or None
 - Requires Authentication - Yes or No
 - Username - Email address
 - Password - Password of the email
4. Click **Ok** toolbar button to save the settings.
- Log in as **Admin user**
 - On user's menu panel, go to **System Manager** folder then click **Company Preferences**

3. On **System Manager** panel, add the necessary details on **SMTP Email Settings** part:

Company Preferences

System Manager

Origin Integration: ☐ Source System:

Default Fields

Functional Currency:

Reporting Currency:

Country:

Environment Type:

Default Accounting Method

☐ Accrual

☐ Cash

SMTP Email Settings

From Email:

From Name:

SMTP Server:

SMTP Port: Encrypted Connection:

☐ Requires Authentication

Username: Password:

Electronic Pricing Options

Interface System:

Quoting System Batch User ID:

Quoting System Batch User Password:

SMTP Email Settings

From Email:

From Name:

SMTP Server:

SMTP Port: Encrypted Connection:

☒ Requires Authentication

Username: Password:

- From Email - alphanumeric (email format - validate on save)
 - From Name - alphanumeric
 - SMTP Server - type of protocol use for the email
 - SMTP Port - Port number of the SMTP server
 - Encrypted Connection - Can be SSL, TLS or None
 - Requires Authentication - Yes or No
 - Username - Email address
 - Password - Password of the email
4. Click **Ok** toolbar button to save the settings.
- Log in as **Admin user**
 - On user's menu panel, go to **System Manager** folder then click **Company Preferences**

3. On **System Manager** panel, add the necessary details on **SMTP Email Settings** part:

The screenshot shows the 'Company Preferences' dialog box with the 'System Manager' tab selected. The left sidebar lists various system components. The main area is divided into sections: 'Origin Integration', 'Default Fields', 'Default Accounting Method', 'SMTP Email Settings' (highlighted with a red box), and 'Electronic Pricing Options'. The 'SMTP Email Settings' section contains fields for 'From Email', 'From Name', 'SMTP Server', 'SMTP Port', 'Encrypted Connection', a 'Requires Authentication' checkbox, 'Username', and 'Password'.

This is a detailed view of the 'SMTP Email Settings' form. It contains the following fields and values:

- From Email: sample.user@irely.com
- From Name: Sample User
- SMTP Server: smtp.office365.com
- SMTP Port: 587
- Encrypted Connection: SSL
- ☒ Requires Authentication
- Username: sample.user@irely.com
- Password: (masked with dots)

- From Email - alphanumeric (email format - validate on save)
 - From Name - alphanumeric
 - SMTP Server - type of protocol use for the email
 - SMTP Port - Port number of the SMTP server
 - Encrypted Connection - Can be SSL, TLS or None
 - Requires Authentication - Yes or No
 - Username - Email address
 - Password - Password of the email
4. Click **Ok** toolbar button to save the settings.

1. Login as **Admin user**
2. From **Admin** folder, double click **Company Preferences**

3. On **Settings panel**, add the necessary details on **SMTP Email Settings** part:

The image shows a 'Company Preferences' dialog box with a sidebar on the left containing 'Options' and 'Settings'. The 'Settings' section is expanded, showing various configuration options. The 'SMTP Email Settings' section is highlighted with a red border. Below the dialog box is a detailed view of the 'SMTP Email Settings' form.

Company Preferences

Origin Integration: ☒

Default Fields

Currency:

Country:

Default Accounting Method

☐ Accrual

☒ Cash

SMTP Email Settings

From Email:

From Name:

SMTP Server:

SMTP Port: Encrypted Connection:

☐ Requires Authentication

Username: Password:

SMTP Email Settings

From Email:

From Name:

SMTP Server:

SMTP Port: Encrypted Connection:

☒ Requires Authentication

Username: Password:

- a. From Email - alphanumeric (email format - validate on save)
- b. From Name - alphanumeric
- c. SMTP Server - type of protocol use for the email
- d. SMTP Port - Port number of the SMTP server
- e. Encrypted Connection - Can be SSL, TLS or None
- f. Requires Authentication - Yes or No
- g. Username - Email address
- h. Password - Password of the email

4. Click **Ok** toolbar button to save the settings.