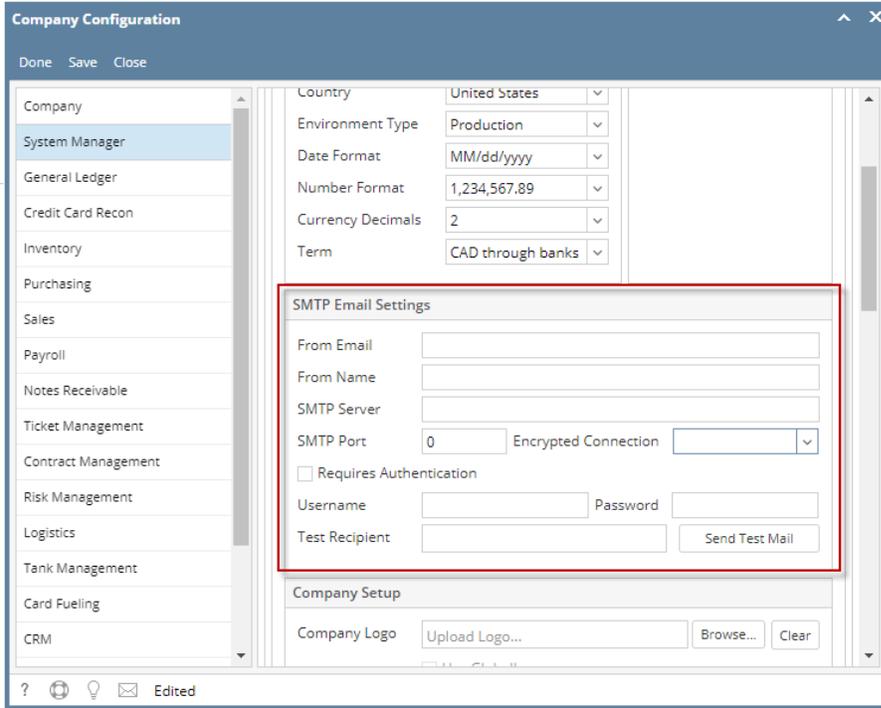


# How to Setup SMTP Email Settings

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:

A detailed view of the 'SMTP Email Settings' form. The fields are filled with the following example 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 set to 'TLS', the 'Requires Authentication' checkbox is checked, 'Username' is 'i21testcompany@gmail.com', and 'Password' is masked with dots. The 'Test Recipient' field is empty, and the 'Send Test Mail' button is visible.

- 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:

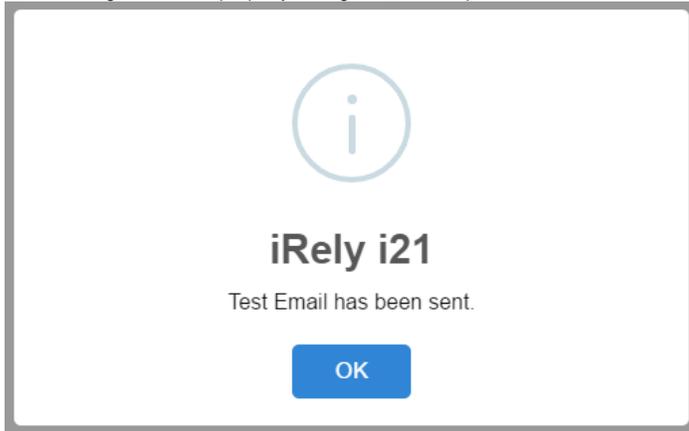
Requires Authentication

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

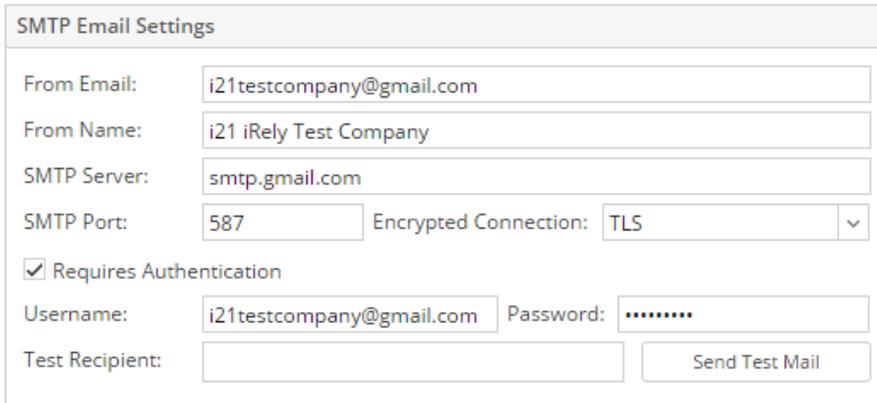
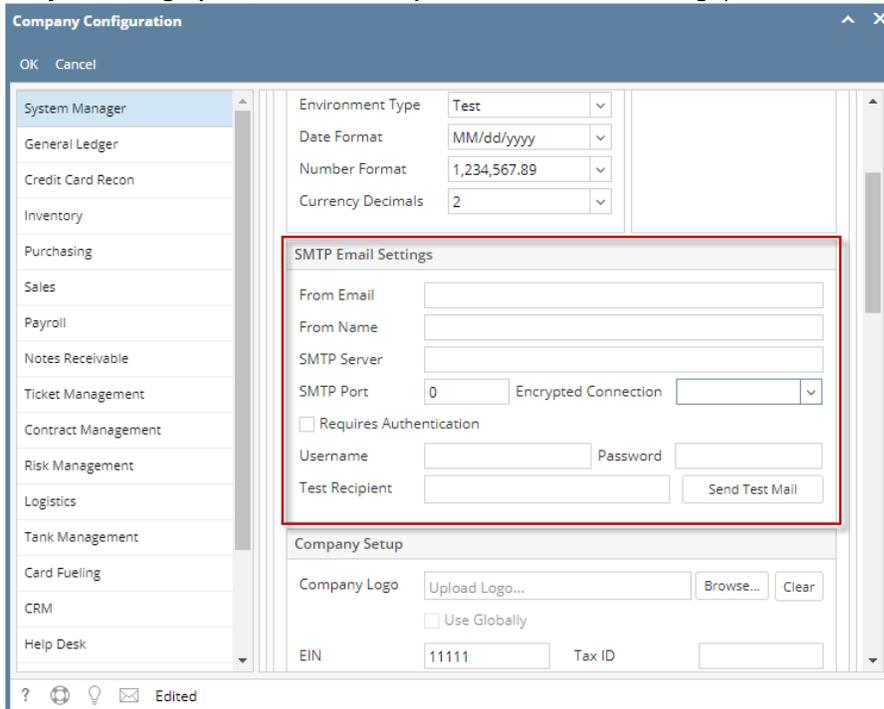


 Refer to these topics if you need to email an invoice report.

- [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**

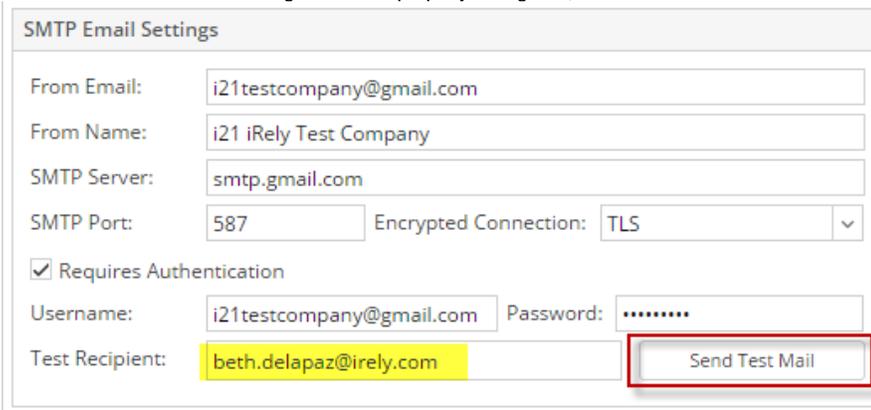
3. On **System Manager** panel, add the necessary details on **SMTP Email Settings** part:



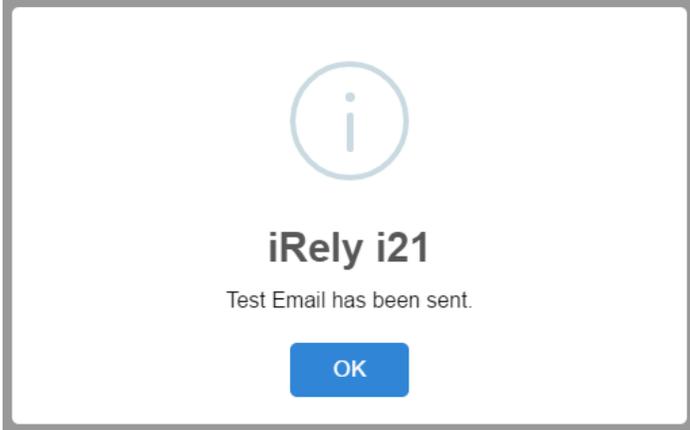
- a. **From Email** - alphanumeric (email format - validate on save)
- b. **From Name** - alphanumeric
- c. **SMTP Server** - type of protocol use for the email
- d. **SMTP Port** - Port number of the SMTP server
- e. **Encrypted Connection** - Can be SSL, TLS or None
- f. **Requires Authentication**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

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

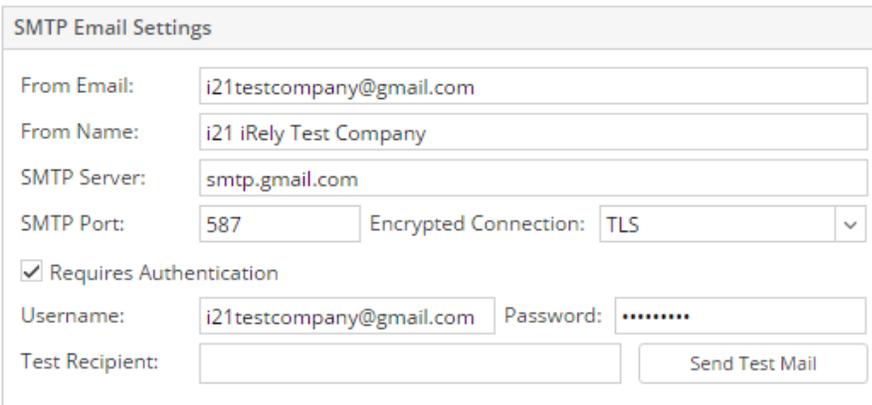
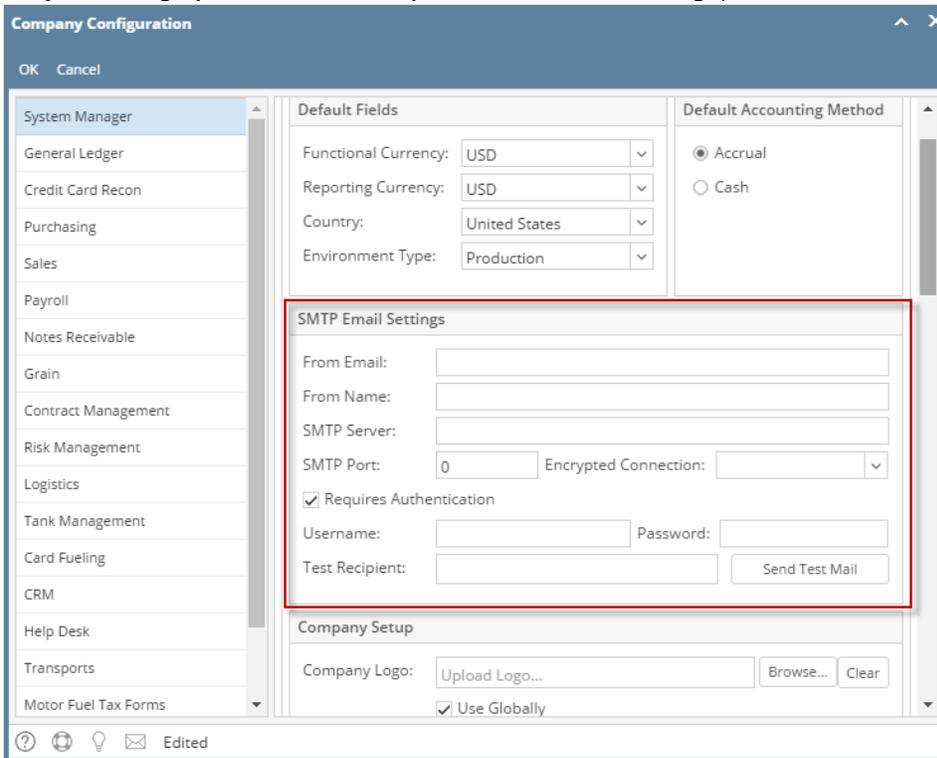
- a. To test if the SMTP Email Settings has been properly configured, enter an email address on the Test Recipient field



- 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. **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

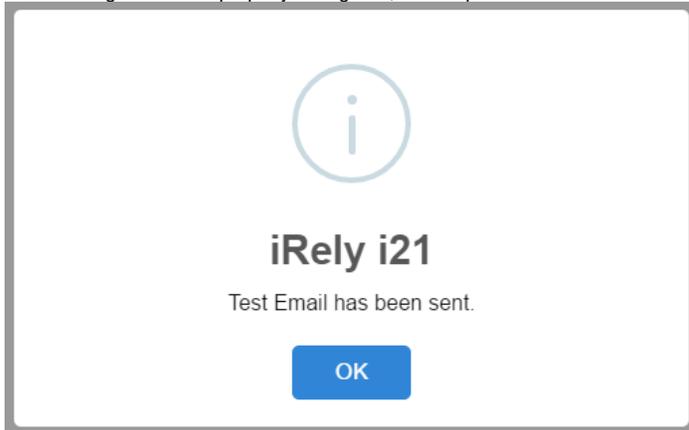
SMTP Port: 587 Encrypted Connection: TLS

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

System Manager

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

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:

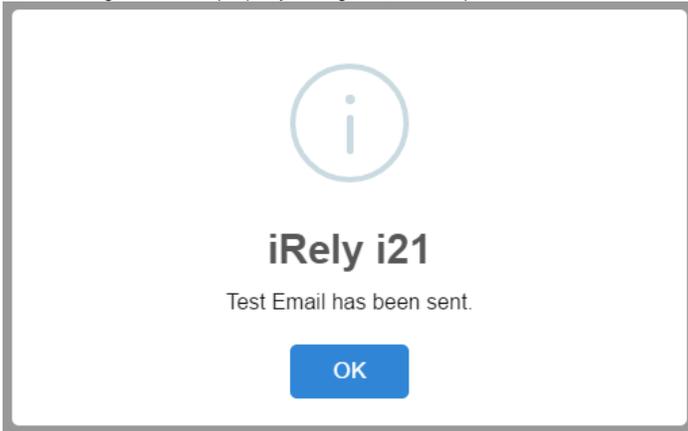
SMTP Port:  Encrypted Connection:  ▼

Requires Authentication

Username:  Password:

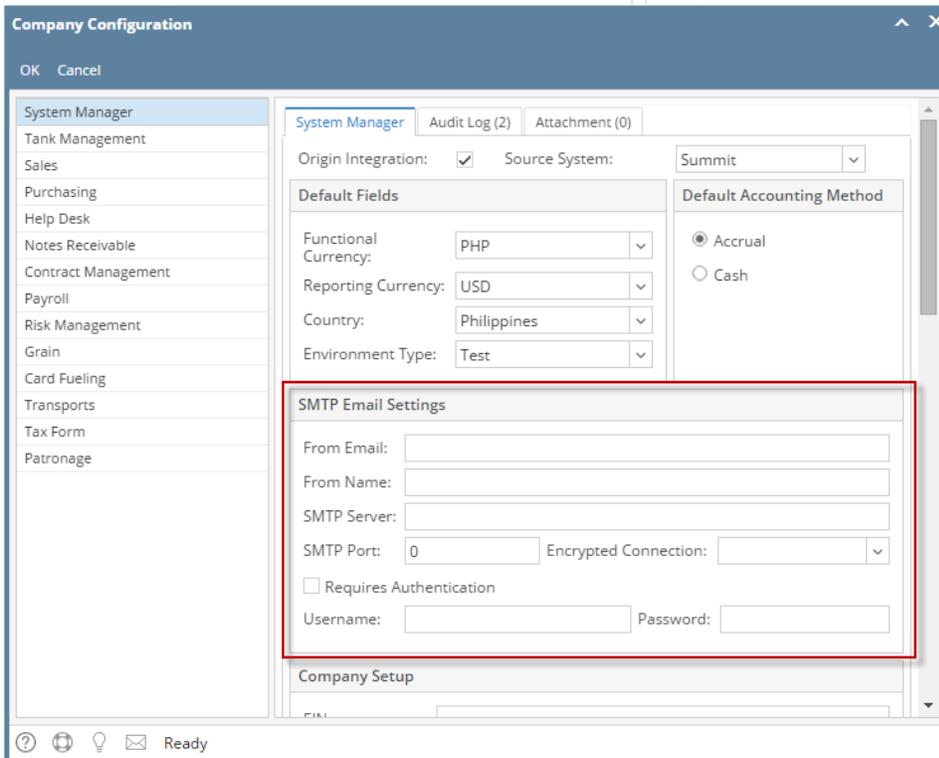
Test Recipient:

- 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:

This image shows a detailed view of the 'SMTP Email Settings' form. The fields are filled with the following values: 'From Email' is 'i21testcompany@gmail.com', 'From Name' is 'i21testcompany', '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 represented by seven dots. The form has a light gray header and a white body.

- 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.

1. Log in as **Admin user**

2. 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. The 'SMTP Email Settings' section is highlighted with a red border. It contains the following fields:

- From Email: [Empty]
- From Name: [Empty]
- SMTP Server: [Empty]
- SMTP Port: 0
- Encrypted Connection: [Empty]
- Requires Authentication
- Username: [Empty]
- Password: [Empty]

The screenshot shows the 'SMTP Email Settings' dialog box with the following sample data:

- 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]

- 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.

1. Log in as **Admin user**

2. 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. On the left is the 'System Manager' panel with a list of modules: Tank Management, Dashboard, Accounts Receivable, Accounts Payable, Notes Receivable, Contract Management, and Grain. The main area is divided into sections: 'Origin Integration' (checkbox), 'Default Fields' (Functional Currency: USD, Reporting Currency, Country: United States), 'Default Accounting Method' (radio buttons for Accrual and Cash), 'SMTP Email Settings' (highlighted with a red border), and 'Electronic Pricing Options' (Interface System). The 'SMTP Email Settings' section contains the following fields: From Email, From Name, SMTP Server, SMTP Port, Encrypted Connection (set to false), a checked 'Requires Authentication' checkbox, Username (set to 0), and Password.

This is a close-up view of the 'SMTP Email Settings' section. The fields are populated with the following values: From Email: sample.user@irely.com, From Name: Sample User, SMTP Server: smtp.office365.com, SMTP Port: 587, Encrypted Connection: SSL, Requires Authentication: checked, Username: sample.user@irely.com, Password: masked with dots.

- 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.

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 screenshot shows the 'Company Preferences' dialog box. On the left is a 'Settings' sidebar with options like 'Dashboard Option', 'Accounts Payable', 'Notes Receivable Preferences', 'Contract Management', 'Accounts Receivable', and 'Tank Management'. The main area is divided into sections: 'Origin Integration' (checked), 'Default Fields' (Currency: USD, Country: dropdown), and 'Default Accounting Method' (Accrual, Cash selected). The 'SMTP Email Settings' section is highlighted with a red border and contains the following fields: 'From Email', 'From Name', 'SMTP Server', 'SMTP Port', 'Encrypted Connection' (dropdown), 'Requires Authentication' (checkbox), 'Username', and 'Password'.

This is a detailed view of the 'SMTP Email Settings' form. The fields are populated with the following sample data: 'From Email' is 'sample.user@irely.com', 'From Name' is 'Sample User', 'SMTP Server' is 'smtp.office365.com', 'SMTP Port' is '587', 'Encrypted Connection' is 'SSL', 'Requires Authentication' is checked, 'Username' is 'sample.user@irely.com', and 'Password' is masked with dots.

- 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.