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:

Company	<u> </u>	Country	United States	
System Manager		Environment Type	Production ~	
Sanaral Ladgar		Date Format	MM/dd/yyyy ~	
Sentit Card Bases		Number Format	1,234,567.89 ~	
Liedit Card Recorr		Currency Decimals	2 ~	
nventory		Term	CAD through banks 🗸	
urchasing		SMTP Email Settings		
ales	- 11	From Email		
ayroll	_	From Name		
lotes Receivable	- 11	SMTP Server		
icket Management		SMTP Port () Encrypted Connection v	i
ontract Management		Requires Authenr	tication	1
lisk Management		Username	Password	
ogistics		Test Recipient	Send Test Mail	1
ank Management				
ard Fueling		Company Setup		
IRM		Company Logo	Jpload Logo Browse Clear	
🗇 🖗 🖂 Edite	^{id} ngs			
rom Email:	i21testo	:ompany@gmail	.com	
rom Name:	i21 iRel	y Test Company		
	smtp.gr	mail.com		
MTP Server:	507	Encryp	ited Connection: TLS	~
MTP Server: MTP Port:	587			
MTP Server: MTP Port: Requires Auth	entication	1		
MTP Server: MTP Port: ☑ Requires Auth Jsername:	entication	:ompany@gmail.	.com Password: ••••••	

- 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 Settin	ngs
From Email:	i21testcompany@gmail.com
From Name:	i21 iRely Test Company
SMTP Server:	smtp.gmail.com
SMTP Port:	587 Encrypted Connection: TLS ~
✓ Requires Auth	entication
Username:	i21testcompany@gmail.com Password:
Test Recipient:	beth.delapaz@irely.com Send Test Mail
From Name: SMTP Server: SMTP Port: Requires Authousername: Test Recipient:	i21 iRely Test Company i21 iRely Test Company smtp.gmail.com 587 Encrypted Connection: TLS v entication i21testcompany@gmail.com Password: •••••••• 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

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Test Email has been sent.	
ок	

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

Log in as Admin user
 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

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System Manager										
		Environment Type	Test	~			-	1		
General Ledger		Date Format	MM/dd/yyyy	~						
Credit Card Recon		Number Format	1,234,567.89	~						
Inventory		Currency Decimals	2	~						
Purchasing		SMTP Email Setting	s							
Sales		From Email								
Payroll		From Name								
Notes Receivable		SMTP Server]			
Ticket Management		SMTP Port	0 Encry	pted Con	nection	~				
Contract Management		Requires Authe	ntication	D			1			
Risk Management	_	Username Test Recipient		Pa	ssword	Send Test Mail				
Logistics	_					Seria resciman	J			
Tank Management		Company Setup								
Card Fueling		Company Logo	Upload Logo			Browse Clear				
CRM			Use Globally							
Help Desk	-	EIN	11111	Tax ID			•	I		
? 🖨 🖓 🖂 Edite	d									
From Email:	i21test	company@gmai	il.com							
From Name:	i21 iRel	y Test Company	/							
SMTP Server:	smtp.g	mail.com								
SMTP Port:	587	Encry	pted Connect	tion: 1	rls		~			
✓ Requires Auth	entication	ı								
	i21toct	company@gmai	il.com Pass	word:						
Username:	12 Lesu		inconn i cara							
Username: Test Recipient:	12 rtest					Send Test Mail				
Username: Test Recipient: a. From Email b. From Name c. SMTP Serve d. SMTP Port e. Encrypted f. Requires Ar g. Username - h. Password - itick Ok toolbar butto a. To test if the	- alphanu - alphanu - alphanu - Port num Connection uthentica Email add Password in to save SMTP Er	imeric (email forr imeric f protocol use for ber of the SMTF on - Can be SSL, tion - Yes or No dress d of the email the settings. mail Settings has	nat - validate c the email Server TLS or None	on save)	ured, ent	Send Test Mail	dress of	the Te	st Recipi	ent
Username: Test Recipient: a. From Email b. From Name c. SMTP Serve d. SMTP Port e. Encrypted of f. Requires Au g. Username- h. Password - tlick Ok toolbar butto a. To test if the SMTP Em	- alphanu - alphanu - alphanu - r type o - Port num Connectio uthentica Email add Password in to save SMTP Er	imeric (email forr imeric f protocol use for ber of the SMTF on - Can be SSL, tion - Yes or No dress d of the email the settings. mail Settings has	nat - validate c the email Server TLS or None	on save) ^v configu	ured, ent	Send Test Mail	dress or	n the Te	est Recipi	ənt
Username: Test Recipient: a. From Email b. From Name c. SMTP Serve d. SMTP Port e. Encrypted of f. Requires Au g. Username- h. Password - b. Password - click Ok toolbar butto a. To test if the From Em	- alphanu - alphanu - alphanu - Port num Connectio uthentica Email add Password on to save SMTP Er ail Settin	imeric (email forr imeric f protocol use for ber of the SMTF on - Can be SSL, tion - Yes or No dress d of the email the settings. mail Settings has gs i21testcompa	nat - validate c the email server TLS or None been properly	on save) r configu	ured, ent	Send Test Mail	dress or	n the Te	ist Recipi	ent
Username: Test Recipient: a. From Email b. From Name c. SMTP Serve d. SMTP Port e. Encrypted 0 f. Requires At g. Username - h. Password - click Ok toolbar butto a. To test if the From Em From Na	- alphanu - alphanu - alphanu er - type o Port num Connectic uthentica Email add Password n to save SMTP Er mail Settin mail: me:	imeric (email forr imeric f protocol use for ber of the SMTF on - Can be SSL, tion - Yes or No dress d of the email the settings. mail Settings has igs i21testcompa i21 iRely Test	nat - validate c the email server . TLS or None been properly ny@gmail.con	on save) ^r configu n	ured, ent	Send Test Mail	dress or	n the Te	est Recipi	ent
Username: Test Recipient: a. From Email b. From Name c. SMTP Served d. SMTP Port e. Encrypted O f. Requires Au g. Username- h. Password - b. Password - b. Password - b. To test if the From Email From Email From Na SMTP Served	- alphanu - alphanu - alphanu - Port num Connectio uthentica Email add Password on to save SMTP Er hail Settin hail: me:	imeric (email forr imeric f protocol use for ober of the SMTF on - Can be SSL, tion - Yes or No dress d of the email the settings. mail Settings has igs i21testcompa i21 iRely Test smtp.gmail.co	nat - validate c the email server . TLS or None been properly ny@gmail.con Company	on save) ^v configu n	ured, ent	Send Test Mail	dress or	n the Te	st Recipi	ent
Username: Test Recipient: a. From Email b. From Name c. SMTP Serve d. SMTP Port e. Encrypted of f. Requires Ar g. Username - h. Password - b. Password - click Ok toolbar butto a. To test if the From Em From Em From Na SMTP Se SMTP Port	- alphanu - alphanu - alphanu - or the second - Port num - SMTP Er 	imeric (email forr imeric f protocol use for ber of the SMTF on - Can be SSL, tion - Yes or No dress d of the email the settings. mail Settings has igs i21testcompa i21 iRely Test smtp.gmail.co 587	nat - validate c the email server TLS or None been properly ny@gmail.con Company m Encrypted	on save) configu n	ured, ent	Send Test Mail er an email add	dress or	n the Te	est Recipi	ent
Username: Test Recipient: a. From Email b. From Name c. SMTP Serve d. SMTP Port e. Encrypted 0 f. Requires Ar g. Username - h. Password - Sitck Ok toolbar butto a. To test if the From Em From Na SMTP Se SMTP Se	- alphanu - alphanu - alphanu - alphanu - or rourn - Port num Connectic uthentica Email add Password on to save SMTP Er 	imeric (email forr imeric f protocol use for ber of the SMTF on - Can be SSL, tion - Yes or No dress d of the email the settings. mail Settings has igs i21testcompa i21 iRely Test smtp.gmail.co 587 entication	nat - validate c the email server .TLS or None been properly ny@gmail.con Company m Encrypted	on save) configu n	ured, ent	Send Test Mail er an email add	dress or	n the Te	est Recipi	ent
Username: Test Recipient: a. From Email b. From Name c. SMTP Serve d. SMTP Port e. Encrypted 0 f. Requires Au g. Username- h. Password - h. Password - b. Password - tick Ok toolbar butto a. To test if the From Em From Em From Na SMTP Se SMTP Port Comparison of the SMTP Port SMTP Port SMTP Port Comparison of the SMTP Port SMTP Port SMT	- alphanu - alphanu - alphanu - or type o - Port num Connection - Port num Connection - Port num - Port n	imeric (email forr imeric f protocol use for ber of the SMTF on - Can be SSL, tion - Yes or No dress d of the email the settings. mail Settings has gs i21testcompa i21 iRely Test smtp.gmail.co 587 entication i21testcompa	nat - validate c the email server TLS or None been properly ny@gmail.con Company m Encrypted	n Conne	ured, ent	Send Test Mail er an email add	dress or	n the Te	ist Recipi	ent

b. Click Send Test Mail button

c.	If the Settings has been properly configured, the recipient will receive a test emain	l
	iDalu i01	
	IRely 121	
	Test Email has been sent.	
	OK	

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

Company Configuration	n					,
OK Cancel						
System Manager	^	Default Fields			Default Accounting	g Method
General Ledger		Functional Currency:	USD	~	 Accrual 	
Credit Card Recon		Reporting Currency:	USD	~	🔿 Cash	
Purchasing		Country:	United States	~		
Sales		Environment Type:	Production	~		
Payroll		CMTD For all Consistent				
Notes Receivable		SWIP Email Settings				
Grain		From Email:				
Contract Management		From Name:				
Risk Management		SMTP Server:	Г			
Logistics		Bequires Authenti	Encryp	ted Connec	tion:	~
Tank Management		Username:	Lation	Pass	word:	
Card Fueling		Test Recipient:			Send Tes	st Mail
CRM						
Help Desk		Company Setup				
Transports		Company Logo: U	pload Logo		Browse	Clear
Motor Fuel Tax Forms	•	~	Use Globally			
? 🗘 🖓 🖂 Edi	ted					
MTP Email Settir	ngs					
From Email:	i21testo	:ompanv@gmail.co	m			
From Name:	:01 :Deb	Tort Correction				
rioni Name:	121 IKely	y rest company				
SMTP Server:	smtp.gr	mail.com				
SMTP Port:	587	Encrypte	d Connection:	TLS		\sim
 Requires Auth 	entication					
Username:	i21testo	ompany@gmail.co	m Password	ł: •••••		
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 Setti	ngs					
From Email:	i21testcompany@gmail.com					
From Name:	i21 iRely Test Company					
SMTP Server:	smtp.gmail.com					
SMTP Port:	587 Encrypted Connection: TLS ~					
Requires Auth	entication					
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

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iRely i21
Test Email has been sent.
ок

Log in as Admin user
 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:

ompany Configuration			
OK Cancel			
System Manager	Functional Curren	ncy: USD	✓ O Accrual
Tank Management	Reporting Currer	ncy: PHP	∨ (
Sales	Country:	United States	~
Purchasing	Environment Typ	e: Test	~
Help Desk			
Notes Receivable	SMTP Email Setti	ngs	
Contract Management	From Email:		
Payroll	From Name:		
Risk Management	SMTP Server:		
Grain	SMTP Port:	0 Encrypte	d Connection: v
Logistics	Requires Auth	entication	
Card Fueling	Username:		Password:
Transports	Test Recipient:		Send Test Mail
Motor Fuel Tax Forms	Company Sotup		
Patronage	Company Setup		
CRM	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	d		
MTP Email Setting	zs		
From Email:	i21testcompany@gm	ail.com	
From Name:	i21 iRely Test Compa	ny	
SMTP Server:	smtp.gmail.com		
SMTP Port:	587 Enc	rypted Connection:	TLS 🗸
Requires Auther	ntication		
✔ Requires Authe Username:	ntication i21testcompany@gm	ail.com 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.

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

SMTP Email Setting	gs		
From Email:	i21testcompany	@gmail.com	
From Name:	i21 iRely Test Co	ompany	
SMTP Server:	smtp.gmail.com	1	
SMTP Port:	587	Encrypted Connection:	TLS v
✓ Requires Authe	entication		
Username:	i21testcompany	@gmail.com Password	
Test Recipient:	beth.delapaz@i	rely.com	Send Test Mail
			1

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

i	
iRely i21	
Test Email has been sent.	- 1
ОК	

Log in as Admin user
 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:

ystem Manager	System	n Manager Aug	dit Log (2) Attachme	ent (0)		
Tank Management						
Sales	Origin	n Integration:	✓ Source Syste	em:	Summit	~
Purchasing	Defau	ult Fields			Default Accountin	ng Method
neip Desk Notes Receivable	Func	tional	DHD	~	Accrual	
Contract Management	Curre	ency:	r i ir		O Cash	
Payroll	Repo	rting Currency:	USD	~		
Risk Management	Cour	itry:	Philippines	~		
Grain	Envir	onment Type:	Test	~		
Card Fueling	CMTD	Empil Cottines				
Tax Form	SWIP	eman secongs				
Patronage	From	Email:				
	From	Name:				
	SMT	P Server:				
	SMT	P Port: 0	Encryp	ted Connec	:tion:	~
	R	equires Authenti	ication			
	User	name:		Pass	word:	
	Comp	oany Setup				
	FINI					
🤊 🗘 🖓 🖂 R	eady					
				1 1		
SMTP Email Se	ttings					
From Email:	i21testcompany	@gmail.co	m			
From Name:	i21testcompany	,				
	- rescompany	1				
SMTP Server:	smtp.gmail.com	1				
SMTP Port:	587	Encrypt	ted Connectior	n: TLS		~
5						
Requires Au	uthentication					

- **a.** From Email alphanumeric (email format validate on save)
- a. From Name alphanumeric
 c. SMTP Server type of protocol use for the email
 d. SMTP Port Port number of the SMTP server
- a. Shift Profit Formalizer of the shift Server
 b. 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.

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 necessar	y details on SMTP	Email Settings pa
э.	On System manager parter	, auu ine necessar	y uctails on Sivir	Linan Setting

Company Preferences	8				
OK Cancel					
System Manager	Origin Integration: 🔲 Source System:				
Tank Management	Default Fields Default Accounting Method				
Help Desk					
Inventory					
Notes Receivable	Cash				
Contract Management	Country:				
Payroll Dick Management	Environment Type: Production				
Grain	SMTD Email Sattings				
Transports					
	From Email:				
	From Name:				
	SMTP Server:				
	SMTP Port: 0 Encrypted Connection:				
	Requires Authentication				
	Username: Password:				
	Electronic Pricing Options				
	Interface Cuctame				
	Durking Curker Datek User ID:				
	Quoting System Batch User ID:				
🔉 🐣 🖉 🕼 Daradu	Quoting System Batch User Password:				
🌶 🛂 🖞 🕒 Ready					
SMTP Email Setti	ngs				
From Email:	sample.user@irely.com				
From Name:	ne: Sample User vver: smtp.office365.com				
SMTP Server:					
SMTP Port:	587 Encrypted Connection: SSL				
Requires Au	thentication				
Lisern ame:	sample user@irely.com Password:				

a. From Email - alphanumeric (email format - validate on save)

- a. From Entail aphranteric (entail of the entail of the entai
- G. Lendypted common control of the boold
 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 necessar	y details on SMTP	Email Settings pa
э.	On System manager parter	, auu ine necessar	y uctails on Sivir	Linan Setting

Company Preferences		× ×				
OK Cancel						
System Manager	Origin Integration:	-				
Tank Management	Default Accounting Method					
Dashboard	Derault Fields Derault Accounting Method					
Accounts Receivable	Funtional Currency: USD 🔹 💿 Accrual					
Notes Receivable	Reporting Currency:					
Contract Management	Country: United States 💙					
Grain						
	SMTD Email Settings	÷.				
	From Email:					
	From Name:					
	SMTP Server:					
	SMTP Port: Encrypted Connection: false					
	Requires Authentication					
	Username: 0 Password:					
	Electronic Pricing Options					
	Interface System:					
	II	-				
🕜 🤨 🦹 Ready						
SMTP Email Settings						
From Email: sam	From Email: sample.user@irely.com					
		=				
From Name: Sam	nple User	_				
SMTP Server: smt	MTP Server: smtp.office365.com					
SMTP Port: 587	Encrypted Connection: SSL	-				
🔽 Requires Authen	Requires Authentication					
Username: sam	sample.user@irely.com 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 Click Ok toolbac button to save the settings 						

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

1. Login as Admin user

2. From Admin folder, double click Company Preferences

Company Preferences	3				3
Options	Origin Inte	aration:			
Settings	Default Fie	Default Fields Currency: USD		Default Accounting Method	
Accounts Payable Notes Receivable Prefere	Currency			O Accrual	
Contract Management	Country:	Country:			
Accounts Receivable Tank Management	SMTP Emai	SMTP Email Settings			
	From Em	ail:			
	From Na	ne:			
	SMTP Se	rver:			
	SMTP Po	rt: Encryp	oted Conne	ection: None	~
	🔲 Requi	res Authentication	-		
	Usernam	Username: Password:			
SMTP Email Settin	ngs				
From Email:	sample.user@irel	y.com			
From Name:	Sample User				
SMTP Server:	smtp.office365.c	om			
SMTP Port:	587	Encrypted Connect	ion:	SSL	
🔽 Requires Au	Requires Authentication				
Username:	sample.user@irel	y.com Passw	ord:	•••••	
 a. From Email b. From Name c. SMTP Serve d. SMTP Port e. Encrypted C f. Requires Au 	- alphanumeric (emai - alphanumeric er - type of protocol us Port number of the S connection - Can be S thentication - Yes or	I format - validate on save) se for the email SMTP server SL, TLS or None No)		

4. Click Ok toolbar button to save the settings.