How To Login as Vendor Contacts

Before you can use your vendor contact as a user login, you have to setup properly the following:

• SMTP Email Settings - set in Company Configuration screen opened from System Manager menu.

🖵 System Manager	Company Configuration		
Users	OK Cancel		
User Roles			
Report Manager	System Manager	SMTP Email Settings	^
	Tank Management		
Company Configuration	Sales	From Email: autosupport@irely.com	
Starting Numbers	Purchasing	From Name: iRely Demo	
Custom Fields	Help Desk	SMTP Server: cmtp outlook com	
Mandadara	Notes Receivable	Sinn Server. Sing.ouddok.com	
Modules	Contract Management	SMTP Port: 587 Encrypted Connection: TLS v	
Letters	Payroll	Requires Authentication	
Company Registration	Risk Management	Username: autosupport@irely.com Password:	
🖵 Utilities	Grain	autosapport@irelyitorii	
_	Card Fueling	Comment Setur	1
🖵 Common Info	Transports	Company Setup	

• Contacts User Role - created from System Manager > User Roles and then select Contact role type. This is where you select the menus to be displayed in the vendor contacts Main Menu.



Once SMTP email settings and User Role were set, you can setup your vendor entity record.

- 1. Create new or open existing vendor record.
- 2. Navigate to Contacts tab.
- 3. Select contact from the grid and click Open button. Entity Contact screen of the selected record will open.
- Entity Cracked Mug



4. Enable Portal Access to show portal related buttons and field.

Detail Audit Log (1)		
Full Name: Email (username): [2]	Cracked Mug apsamplevendor@gmail.com	d Photo
Phone: Alt Phone: Contact Method:	755-4585 Mobile: Alt Email:	
Location Name: Contact Role:	Location 1	
Active:	Department:	
Portal Access:	Timezone:	
Type:	General	
Notes:		
Email Distribution:		

5. Select Contact Role applicable for vendor contacts.

Select Contact Role appl	Location I	~
Contact Role:	Contacts	~
A	Desertment	

- 6. Save setup.
- Click Email Login button. This will send the credentials of the vendor contact.
 A message will prompt that email was sent.

Very Sore Refer Decker Und Endlägde George Provided Cocc Very Name: Very Name: Occocct Notes: Very Name: Notes:		acked Mug
The second se	New Save	eh Delete Undo Email Login Change Pussword Close
Intermet Law Image: Cardweld Mug Prome: Image: Cardweld Mug At Phone: Image: Cardweld Mug At Phone: Image: Cardweld Mug Corract N Image: Cardweld Mug Rectar Arc Image: Cardweld Mug Notes: Image: Cardweld Mug Image: Corract N Image	Detail Au	(2)
Email (user of the resonance of the resona	Full Name:	Cracked Mug
Title Prome: At Phone Contact N Location Contact R I celly i21 Portal Act I of 1 email successfully sent. Type: Neess Colose screens and logout of i21. Check email for the vendor contact's login credential. I celly Login Credentials I colose screens and logout of i21. Check email for the vendor contact's login credential. I celly Login Credentials I colose screens autosupport@irely.com to me User Name: apsamplevendor@gmail.com Password: 1234 Please login thr:: http://localhost/i1540/i21/ Check out the following Help Desk training videos: http://help.trelyserver.com/display/DOC/Help+Desk+Tr	Email (use	Seconda and after from Second
Prome iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii	Title:	
At Phone Contact N Location 1 IRely i21 1 of 1 email successfully sent. Type: Note: Contact N Internal Distribution: Seveet Contact's login credential. Close screens and logout of i21. Check email for the vendor contact's login credential. IRely Login Credentials Inbox × autosupport@irely.com to me User Name: apsamplevendor@gmail.com Password: 1234 Please login thru: http://localhost/11540/121/ Check out the following Help Desk training videos: http://help.irelyserver.com/display/DOC/Help+Desk+Tri	Phone:	
Consect N Lacason Consect N Active: I of 1 email successfully sent. Type: Nose: Cose screens and logout of i21. Check email for the vendor contact's login credential. Check email for the vendor contact's login credential. I rely Login Credentials Inbox × autosupport@irely.com to me User Name: apsamplevendor@gmail.com Password: 1234 Please login thr: http://localhost/11540/121/ Check out the following Help Desk training videos: http://help.irelyserver.com/display/DOC/Help+Desk+Tri	Alt Phone	(i)
Lacasoni iRely i21 Active: 1 of 1 email successfully sent. Type: OK Image: OK Email Distribution: OK Seved Image: Close screens and logout of i21. Check email for the vendor contact's login credential. iRely Login Credentials Inbox × Image: User Name: User Name: Image: User Name: Image: User Name: apsamplevendor@gmail.com Please login thru: http://focalhost/11540/121/ Check out the following Help Desk training videos: http://help.irelyserver.com/display/DOC/Help+Desk+Tri	Contact N	
Coreact B iRely i21 1 of 1 email successfully sent. Type: OK Email Distribution: OK Seved Email Distribution: OK Seved It is a part of the second of	Location P	
Active: 1 of 1 email successfully sent. Type: OK Image: Image: Image: Image: Image: Image: Image: OK Image: Image: Image:	Contact R	iRelv i21
I of 1 errar successfully sent. Type: Image Distribution: Image Distribution	Active:	
OK Imail Distribution: OK OK Imail Distribution: OK	Turner	1 of 1 email successfully sent.
Close screens and logout of i21. Check email for the vendor contact's login credential. iRely Login Credentials Inbox × autosupport@irely.com to me · User Name: apsamplevendor@gmail.com Password: 1234 Please login thru: http://localhost/11540/121/ Check out the following Help Desk training videos: http://help.irelyserver.com/display/DOC/Help+Desk+Tri	Nonec	OK
Close screens and logout of i21. Check email for the vendor contact's login credential. iRely Login Credentials Inbox × autosupport@irely.com to me · User Name: apsamplevendor@gmail.com Password: 1234 Please login thru: http://localhost/i1540/i21/ Check out the following Help Desk training videos: http://help.irelyserver.com/display/DOC/Help+Desk+Tri		
Email Decribution: Image: Served Close screens and logout of i21. Check email for the vendor contact's login credential. iRely Login Credentials Image: Index:		
Close screens and logout of i21. Check email for the vendor contact's login credential. iRely Login Credentials Inbox × autosupport@irely.com to me • User Name: apsamplevendor@gmail.com Password: 1234 Please login thru: http://localhost/11540/121/ Check out the following Help Desk training videos: http://help.irelyserver.com/display/DOC/Help+Desk+Tri	Email Distri	
Close screens and logout of i21. Check email for the vendor contact's login credential. iRely Login Credentials Inbox × autosupport@irely.com to me • User Name: apsamplevendor@gmail.com Password: 1234 Please login thru: http://localhost/11540/121/ Check out the following Help Desk training videos: http://help.irelyserver.com/display/DOC/Help+Desk+Tu		
Close screens and logout of i21. Check email for the vendor contact's login credential. iRely Login Credentials Inbox x autosupport@irely.com to me v User Name: apsamplevendor@gmail.com Password: 1234 Please login thru: http://localhost/i1540/i21/ Check out the following Help Desk training videos: http://help.irelyserver.com/display/DOC/Help+Desk+Tu	O O V	ed III II Page 1 of 1 DI
Check email for the vendor contact's login credential. iRely Login Credentials Inbox × autosupport@irely.com to me User Name: apsamplevendor@gmail.com Password: 1234 Please login thru: http://localhost/11540/i21/ Check out the following Help Desk training videos: http://help.irelyserver.com/display/DOC/Help+Desk+Tu	Close scr	s and logout of i21.
iRely Login Credentials Inbox x autosupport@irely.com to me User Name: apsamplevendor@gmail.com Password: 1234 Please login thru: http://localhost/i1540/i21/ Check out the following Help Desk training videos: http://help.irelyserver.com/display/DOC/Help+Desk+Tu	Check en	for the vendor contact's login credential.
autosupport@irely.com to me User Name: <u>apsamplevendor@gmail.com</u> Password: 1234 Please login thru: <u>http://localhost/i1540/i21/</u> Check out the following Help Desk training videos: <u>http://help.irelyserver.com/display/DOC/Help+Desk+Tr</u>	iRely L	n Credentials Inbox x
autosupport@irely.com to me User Name: <u>apsamplevendor@gmail.com</u> Password: 1234 Please login thru: <u>http://localhost/i1540/i21/</u> Check out the following Help Desk training videos: <u>http://help.irelyserver.com/display/DOC/Help+Desk+Tu</u>		
to me User Name: apsamplevendor@gmail.com Password: 1234 Please login thru: <u>http://localhost/i1540/i21/</u> Check out the following Help Desk training videos: <u>http://help.irelyserver.com/display/DOC/Help+Desk+Tri</u>	a	upport@irely.com
User Name: <u>apsamplevendor@gmail.com</u> Password: 1234 Please login thru: <u>http://localhost/i1540/i21/</u> Check out the following Help Desk training videos: <u>http://help.irelyserver.com/display/DOC/Help+Desk+Tu</u>	- A -	v
Plassword. 1234 Please login thru: <u>http://localhost/i1540/i21/</u> Check out the following Help Desk training videos: <u>http://help.irelyserver.com/display/DOC/Help+Desk+Tu</u>	to	ame: apsamplevendor@gmail.com
Check out the following Help Desk training videos: http://help.irelyserver.com/display/DOC/Help+Desk+Tu	U	and 1004
	U: Pi Pi	ord: 1234 I login thru: http://localhost/i1540/i21/

Before you can use your vendor contact as a user login, you have to setup properly your SMTP Email Settings in the Company Preference screen.

Company Preferences								
OK Cancel								
System Manager	Origin Integration	n: 🔽						^
Tank Management	Default Fielde			Defe	ult Accountin	a Mathad		
Dashboard	Default Fields			Dera	uit accountin	g method		
Accounts Receivable	Currency:	USD	¥	۲	Accrual			
Accounts Payable	Country:	United States	Y	0	Cash			
Notes Receivable	country.	oniced States			Casii			
Contract Management								- 1
Grain	SMTP Email Sett	ings						
Card Fueling	From Email:	i21testcompany@san	ple.con	n				
	From Name:	Sample Company						
	SMTP Server:	smtp.sample.com						
	SMTP Port:	587	Encryp	ted Co	nnection:	TLS	*	
	☑ Requires Au	uthentication						
	Username:	i21testcompany@san	ple.con	n	Password:	•••••]
	Electronic Pricing	Options						
	Interface Syste	em:					¥	
	Quoting System	n Batch User ID:						
	Quoting System	n Batch User Password	l:					
	Interface Mich	Convisoo LIDL						1 -
🕜 这 🏆 Ready								

Once SMTP email settings is set, you can setup your vendor entity record.

- 1. Create new or open existing vendor record.
- 2. Navigate to Contacts tab.
- 3. Select contact from the grid and click View button. Entity Contact screen of the selected record will open.



4. Enable Portal Access to show portal related buttons, tabs and fields.

	Entity Contact - C-001	ion portai rotatou	b attorno, ta			X
	New Save Refresh	Delete Undo	Email Log	in Change Pa) assword	Close
	Detail Portal Permissio	ons				
	Full Name:	C-001				
	Email (username): 🚇	juandelacruz@sar	mple.com			Add Photo
	Title:					
	Phone:			Mobile:		
	Alt Phone:			Alt Email:		
	Contact Method:		*	Fax:		
	Location Name:	L-001				¥
	Active:	Department:				
	Portal Access:	Timezone:	(UTC-08	:00) Pacific T	ime (US	& Canada) 🛛 💌
-						
5 N	🥑 😒 🏆 Ready	sions tab and enal	hle vendoi		age	1 of 1 🕨 🕅
	Contact - C-001			menus.		* ×
	New Save Refresh	Delete Undo	Email Log	in Change Pa	assword	Close
	Detail Portal Permissio	ons				
	Username (email): juar	idelacruz@sample.	.com	Use	er Type:	User 💌
	🔽 Enable All 🔲 Disab	le All Filter:			٩	
	Name					Enabled
	∃ Vendor					
	Vendor					
	DIII					V

- 6. Save setup.7. Click Email Login button. This will send the credentials of the vendor contact.

8. A message will prompt that email was sent.

🗊 Entity Contact - C	001	* ×
New Save Re	Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system Image: Second system	Close
Detail Portal Perr	nissions	
Username (email):	r Type:	User 💌
Enable All Name	1 of 1 email successfully sent.	Enabled
Vendor Vendor	ОК	
Bill		

- Close screens and logout of i21.
 Check email for the vendor contact's login credential.

	Search Current Mailbox	(Ctrl+E) 🔎 Cur	rrent Mailbox 👻	🕞 Reply 👰 R	eply All 🛛 🕞 For	ward	
	All Unread	By Date 🔻	Newest↓ 🔺		Wed 6/17/2015	15:07	
	▲ Today				i21testco	mpany@samp	le.com
	i21testcompany iRely Login Credenti User Name: juandelac	@sample.com ials cruz@sample.com	► 15:08 ★	To Juan dela Cruz	iRely Login (Credentials	
	Herroraliz/Feditionar			User Name: Password: 12	<u>juandelacruz@</u> 234	sample.com	
	Berris/Tation Her 6 11 164	(Net)					
	Control (States) Strapp (States) States Strapp (States) States	(MANA) Maria (Calina Tarana) - Tar	***				
11. 1	Use this crede	ntial to login int	o i21.				
	🌀 Log in						
		ľ	Rely				
		Enterpris	se Software				
		Sim	plitied				
	User Name:	juandelacruz@sa	mple.com				
	Password:	••••					
	Company:	AG	ely Grain and A	g Co			
		🔲 Remember Me	9				
		Log in		<u>Forgot</u>	Login?		
			Ver	rsion : 15.21.06	16.204		