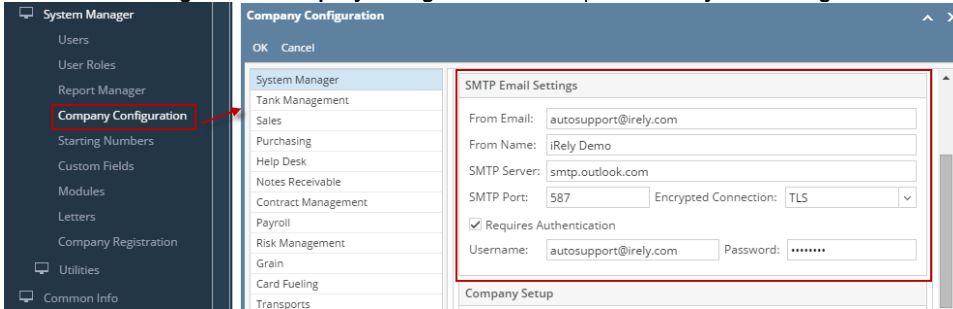


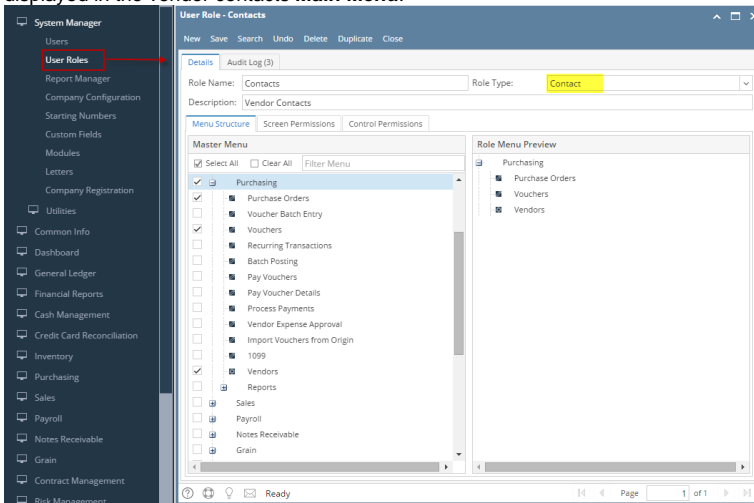
# How To Login as Vendor Contacts

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.

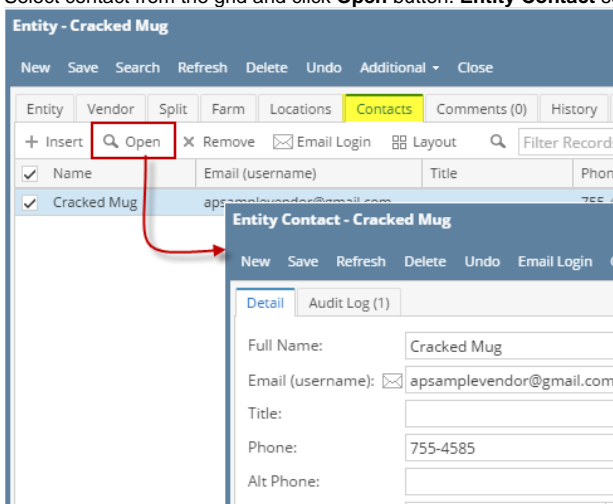


- **Contacts User Role** - created from **System Manager > User Roles** and then select **Contact** role type. This is where you select the menus to be displayed in the vendor contacts **Main Menu**.



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.



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

Entity Contact - Cracked Mug

New Save Refresh Delete Undo Email Login Change Password Close

Detail Audit Log (1)

Full Name: Cracked Mug

Email (username): apsamplevendor@gmail.com

Title:

Phone: 755-4585 Mobile:

Alt Phone: Alt Email:

Contact Method: Fax:

Location Name: Location 1

Contact Role:

Active: ☒ Department:

Portal Access: ☒ Timezone:

Type: General

Notes:

Email Distribution:

5. Select **Contact Role** applicable for vendor contacts.

Location Name: Location 1

Contact Role: Contacts

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 - Cracked Mug

New Save Refresh Delete Undo Email Login Change Password Close

Detail Audit Log (2)

Full Name: Cracked Mug

Email (username): apsamplevendor@gmail.com

Title:

Phone: 755-4585 Mobile:

Alt Phone: Alt Email:

Contact Method: Fax:

Location Name: Location 1

Contact Role: Contacts

Active: ☒ Department:

Portal Access: ☒ Timezone:

Type: General

Notes:

Email Distribution:

iRely i21

1 of 1 email successfully sent.

OK

9. Close screens and logout of i21.

10. Check email for the vendor contact's login credential.

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+Tutorials>

11. Use this credential to login into 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

System Manager  
 Tank Management  
 Dashboard  
 Accounts Receivable  
 Accounts Payable  
 Notes Receivable  
 Contract Management  
 Grain  
 Card Fueling

Origin Integration: ☒

Default Fields  
 Currency: USD  
 Country: United States

Default Accounting Method  
☒ Accrual  
☐ Cash

SMTP Email Settings

From Email: i21testcompany@sample.com  
 From Name: Sample Company  
 SMTP Server: smtp.sample.com  
 SMTP Port: 587 Encrypted Connection: TLS  
☒ Requires Authentication  
 Username: i21testcompany@sample.com Password: .....

Electronic Pricing Options  
 Interface System:  
 Quoting System Batch User ID:  
 Quoting System Batch User Password:  
 Interface Web Services URL:

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.

Entity - Juan Dela Cruz

New Save Search Refresh Undo Additional Close

Entity Vendor Locations Contacts Notes History Attachments Custom

Insert View Remove Email Login Layout Filter Records (F3)

✓	Name	Email (username)	Title	Phone	Mobile	Loc
✓	C-001	juandelacruz@sample.com				L-0

Entity Contact - C-001

New Save Refresh Delete Undo Close

Detail

Full Name: C-001  
 Email (username): juandelacruz@sample.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 Time (US & Canada)  
 Notes:

Edited Page 1 of 1

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

Entity Contact - C-001

New Save Refresh Delete Undo Email Login Change Password Close

Detail Portal Permissions

Full Name: C-001

Email (username): juandelacruz@sample.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 Time (US & Canada)

Notes:

Ready Page 1 of 1

5. Navigate to **Portal Permissions** tab and enable vendor menus.

Entity Contact - C-001

New Save Refresh Delete Undo Email Login Change Password Close

Detail Portal Permissions

Username (email): juandelacruz@sample.com User Type: User

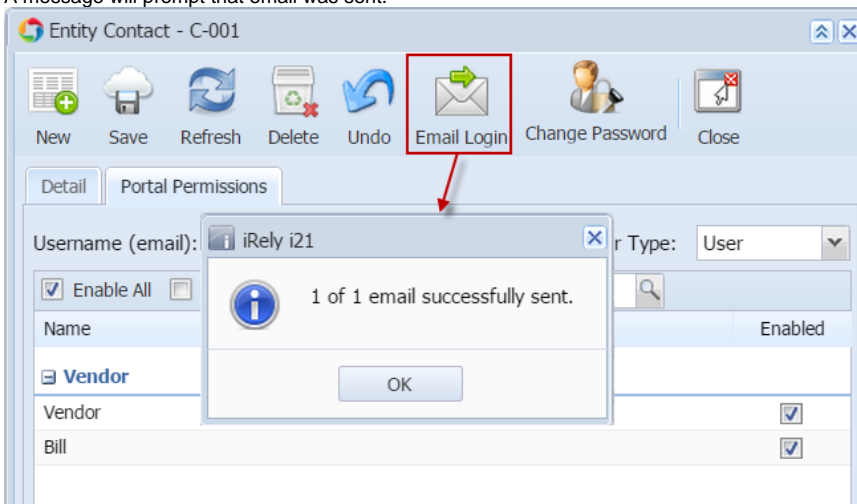
☒ Enable All ☐ Disable All Filter:

Name	Enabled
<b>Vendor</b>	
Vendor	<input checked="" type="checkbox"/>
Bill	<input checked="" type="checkbox"/>

6. **Save** setup.

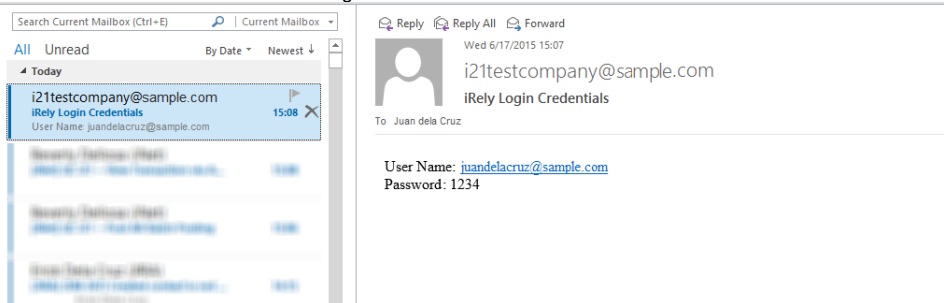
7. Click **Email Login** button. This will send the credentials of the vendor contact.

8. A message will prompt that email was sent.



9. Close screens and logout of i21.

10. Check email for the vendor contact's login credential.



11. Use this credential to login into i21.

