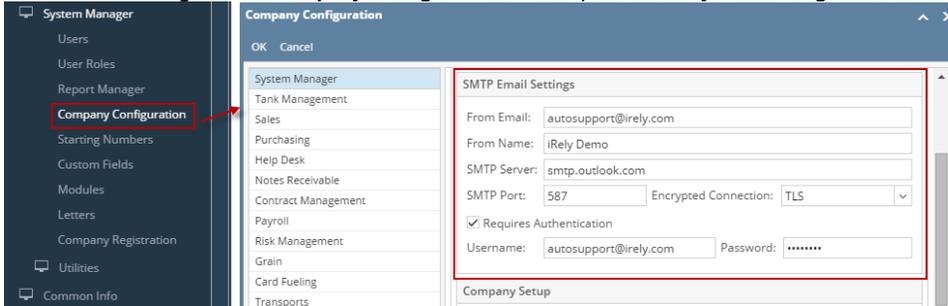


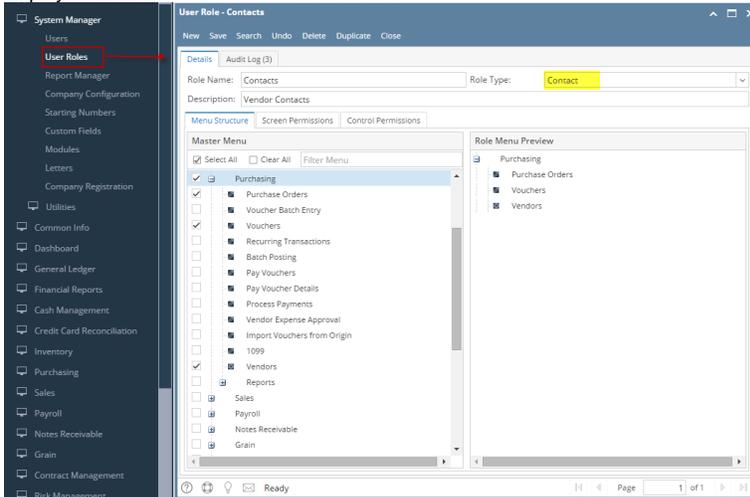
How To Login as Vendor Contacts

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.

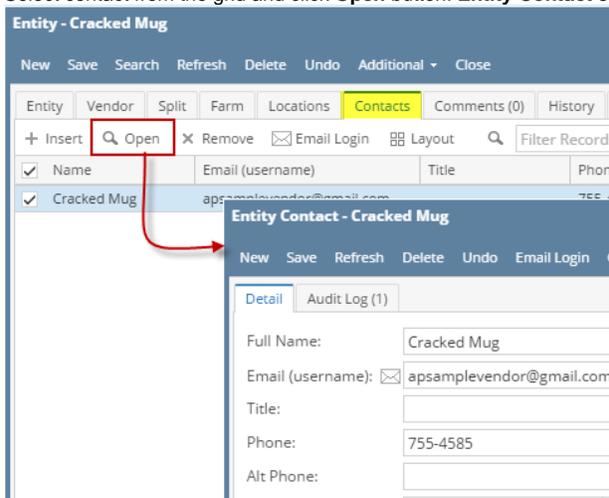


- **Contacts User Role** - created from **System Manager > User Roles** and then select **Contact** role type. This is where you select the menus to be displayed in the vendor contacts **Main Menu**.

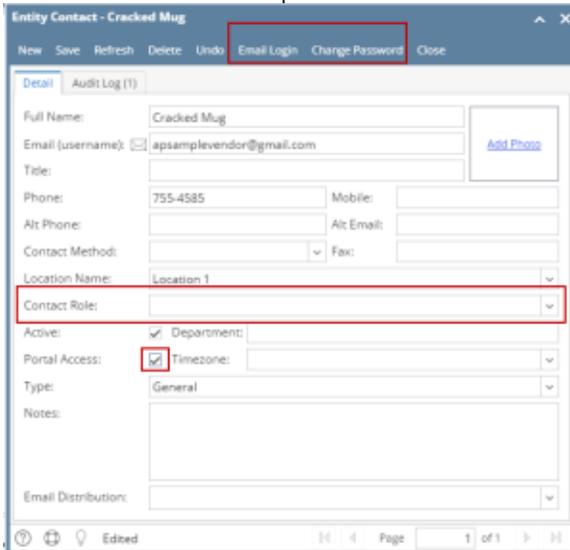


Once SMTP email settings and User Role were set, you can setup your vendor entity record.

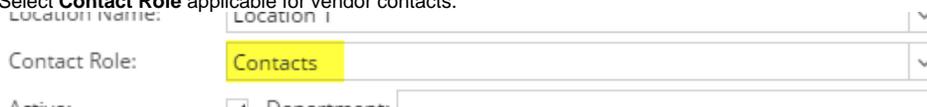
1. Create new or open existing vendor record.
2. Navigate to **Contacts** tab.
3. Select contact from the grid and click **Open** button. **Entity Contact** screen of the selected record will open.



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



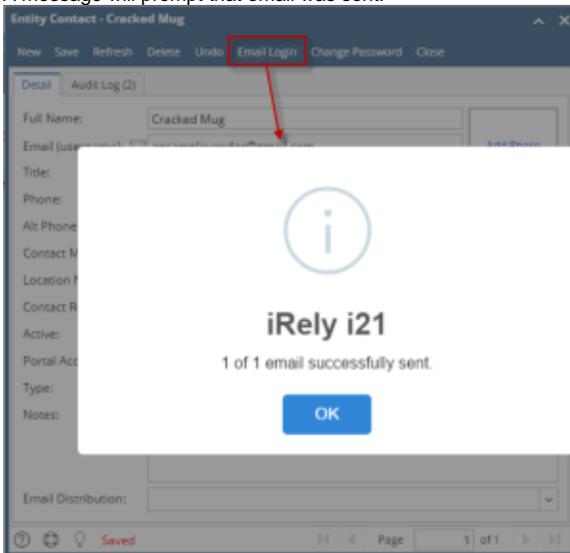
5. Select **Contact Role** applicable for vendor contacts.



6. **Save** setup.

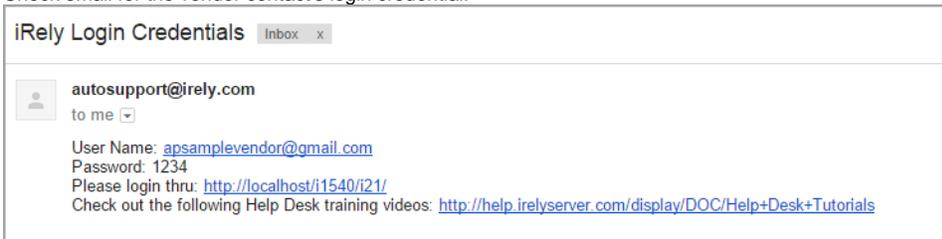
7. Click **Email Login** button. This will send the credentials of the vendor contact.

8. A message will prompt that email was sent.



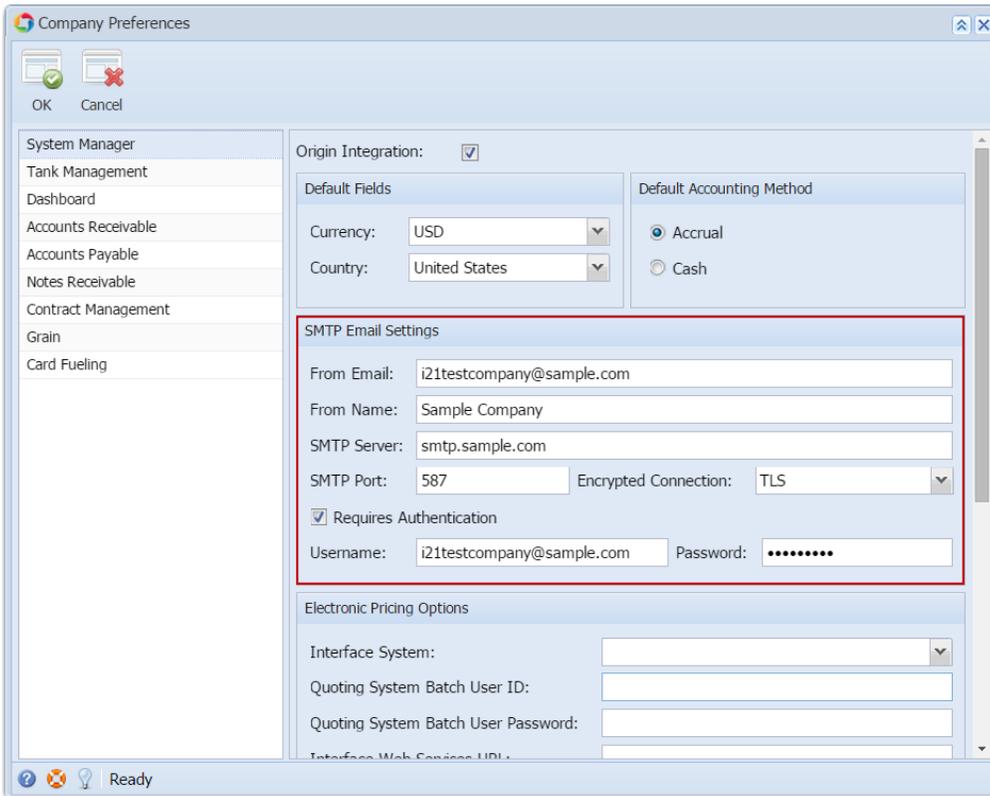
9. Close screens and logout of i21.

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



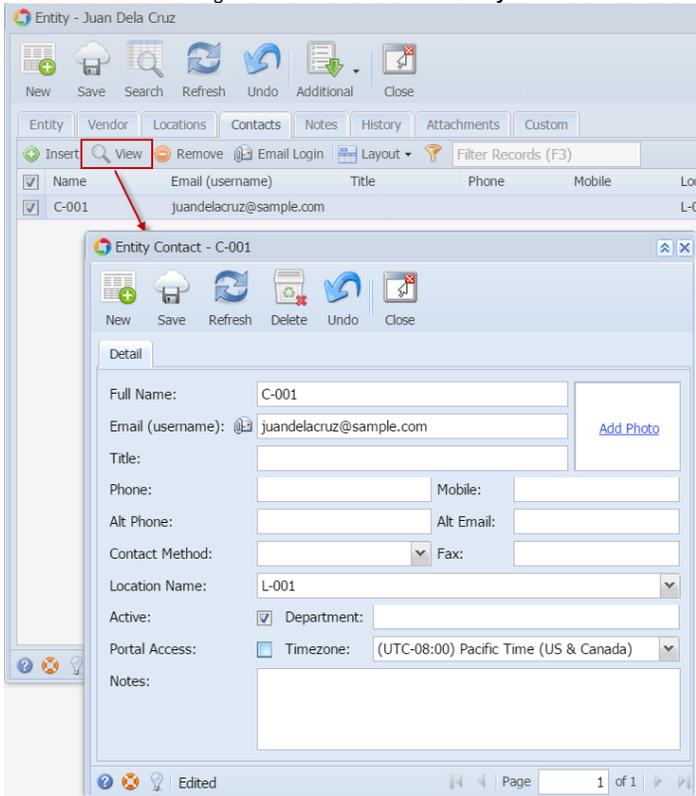
11. Use this credential to login into i21.

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.



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

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

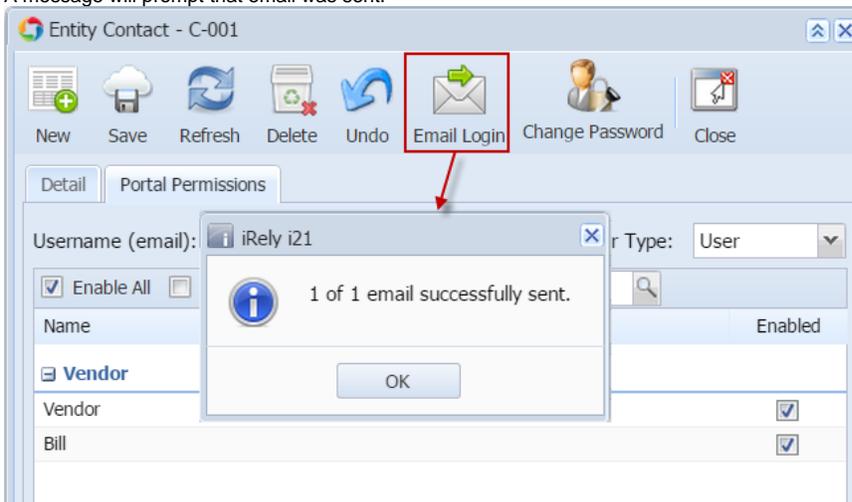
Enable All Disable All Filter:

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

6. **Save** setup.

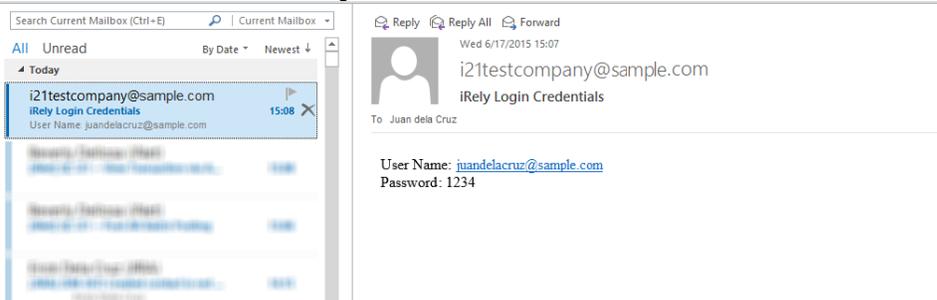
7. Click **Email Login** button. This will send the credentials of the vendor contact.

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.

