How to Configure Company Setup

This screen is where we configure the basic company information. However, user can only change the **Company Name** if the Origin Integration is turned off.
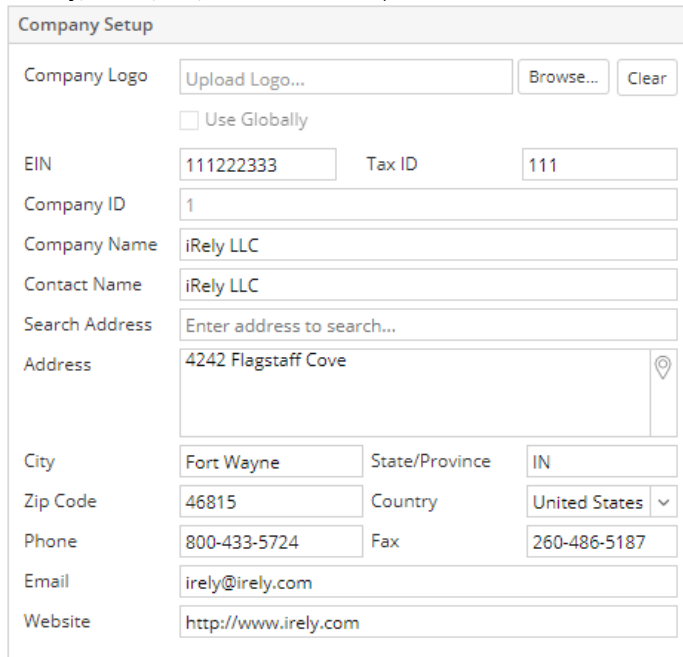
1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**
3. Add a company logo by clicking on the Browse button then select the file that you would want as the company's logo
   a. Tick the **Use Globally** check box so that when a company logs in it displays their logo immediately in the login screen
4. Enter a Company Name
   a. If Origin Integration is turned **ON**, **Company Name** field is disabled:
   b. If Origin Integration is turned **OFF**, **Company Name** field is enabled:
      Origin Integration on Company Configuration has already been turned off, so Company Name field is editable.
5. Enter the necessary details on the provided fields (**EIN,Tax ID, Company Name, Contact Name, Address, Zip Code, City, State/Province, Country, Phone, Fax, Email** and **Website**)

Company Setup		
Company Logo	Change Logo...	Browse... Clear
	☑ Use Globally	
EIN	111222333	Tax ID AA1
Company ID	1	
Company Name	iRely LLC	
Contact Name	iRely	
Search Address	Enter address to search...	
Address	4242 Flagstaff Cove	⊙
City	Fort Wayne	State/Province IN
Zip Code	46815	Country United States ⌄
Phone	800-433-5724	Fax 260-486-5187
Email	support@irely.com	
Website	http://www.irely.com	

6. Click **Save** or **Done** button to save the setup.
7. Reload i21 to apply the changes on the Login screen and i21 menu header

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**
3. Add a company logo by clicking on the Browse button then select the file that you would want as the company's logo
   a. Tick the **Use Globally** check box so that when a company logs in it displays their logo immediately in the login screen
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   a. If Origin Integration is turned **ON**, **Company Name** field is disabled:
   b. If Origin Integration is turned **OFF**, **Company Name** field is enabled:
      Origin Integration on Company Configuration has already been turned off, so Company Name field is editable.

5. Enter the necessary details on the provided fields (**EIN,Tax ID, Company Name, Contact Name, Address, Zip Code, City, State/Province, Country, Phone, Fax, Email** and **Website**)
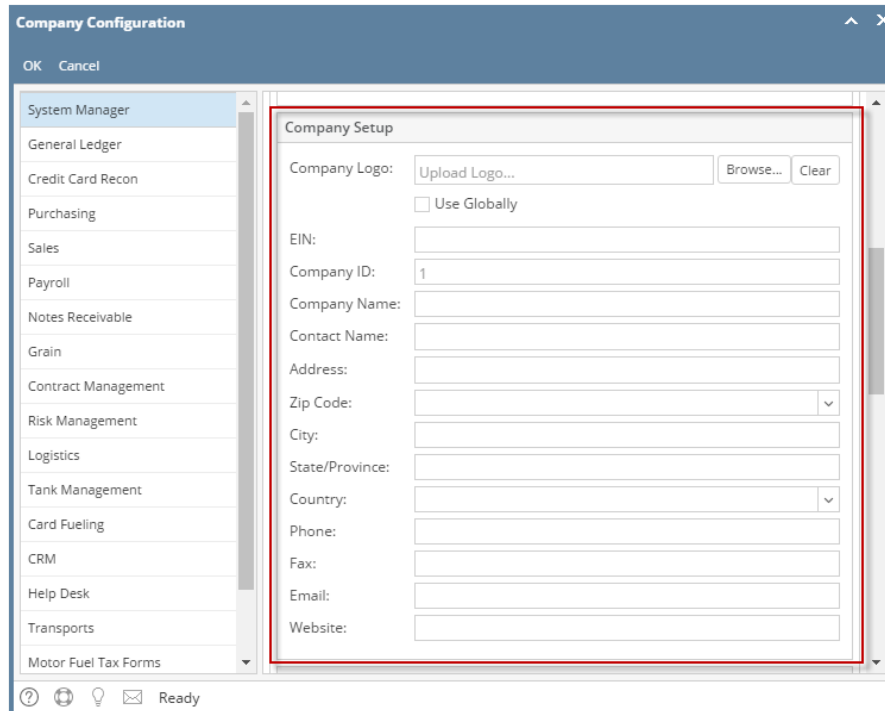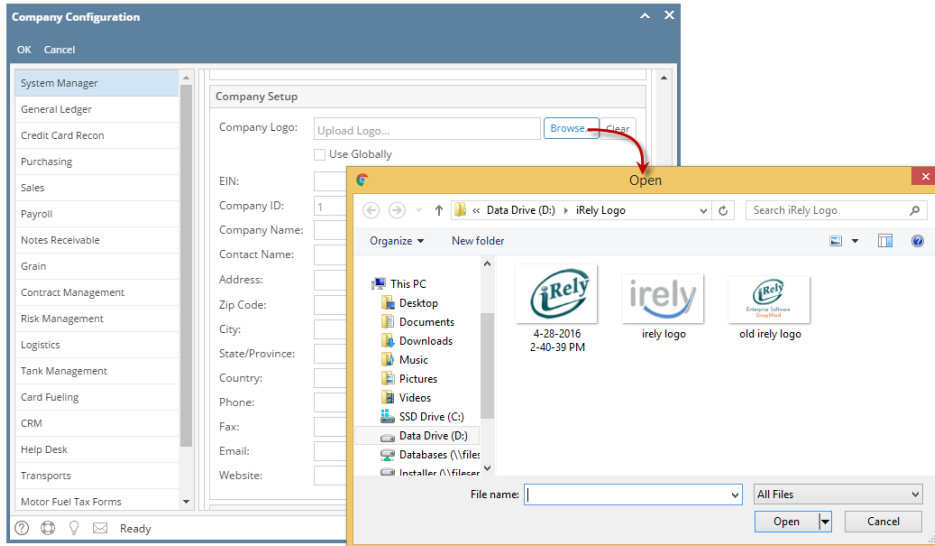
Company Setup

Company Logo	Upload Logo... Browse... Clear
	☐ Use Globally
EIN	111222333 Tax ID 111
Company ID	1
Company Name	iRely LLC
Contact Name	iRely LLC
Search Address	Enter address to search...
Address	4242 Flagstaff Cove
City	Fort Wayne State/Province IN
Zip Code	46815 Country United States ⌄
Phone	800-433-5724 Fax 260-486-5187
Email	irely@irely.com
Website	http://www.irely.com

6. Click Ok button to save the setup.
7. Reload i21 to apply the changes on the Login screen and i21 menu header

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**

Company Configuration

OK   Cancel

System Manager
General Ledger
Credit Card Recon
Purchasing
Sales
Payroll
Notes Receivable
Grain
Contract Management
Risk Management
Logistics
Tank Management
Card Fueling
CRM
Help Desk
Transports
Motor Fuel Tax Forms

Company Setup

Company Logo:	Upload Logo... Browse... Clear
	☐ Use Globally
EIN:	
Company ID:	1
Company Name:	
Contact Name:	
Address:	
Zip Code:	⌄
City:	
State/Province:	
Country:	⌄
Phone:	
Fax:	
Email:	
Website:	

Ready

3. Add a company logo by clicking on the Browse button then select the file that you would want as the company's logo

a. Tick the **Use Globally** check box so that when a company logs in it displays their logo immediately in the login screen

4. Enter a Company Name
a. If Origin Integration is turned **ON**, **Company Name** field is disabled:

b. If Origin Integration is turned **OFF**, **Company Name** field is enabled:

Origin Integration on Company Configuration has already been turned off, so Company Name field is editable.

5. Enter the necessary details on the provided fields (**EIN,Company Name, Contact Name, Address, Zip Code, City, State/Province, Country, Phone, Fax, Email** and **Website**)

Company Setup	
Company Logo:	4-28-2016 2-40-39 PM.png Browse...	Clear
	✓ Use Globally
EIN:	01
Company ID:	1
Company Name:	iRely LLC *** TEST ***
Contact Name:	iRely LLC
Address:	4242 Flagstaff Cove
Zip Code:	46815
City:	Fort Wayne
State/Province:	IN
Country:	United States
Phone:	800-433-5724
Fax:	260-486-5187
Email:	irely-support@irely.com
Website:	http://www.irely.com

6. Click **OK** button to save the setup.
7. Reload i21 to apply the changes
   a. Login screen

Sign in to i21

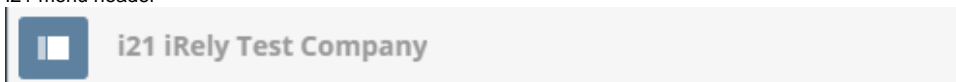| User Name: | |
Password:	
Company:	01
	iRely LLC *** TEST ***

Sign In   ☐ Remember me
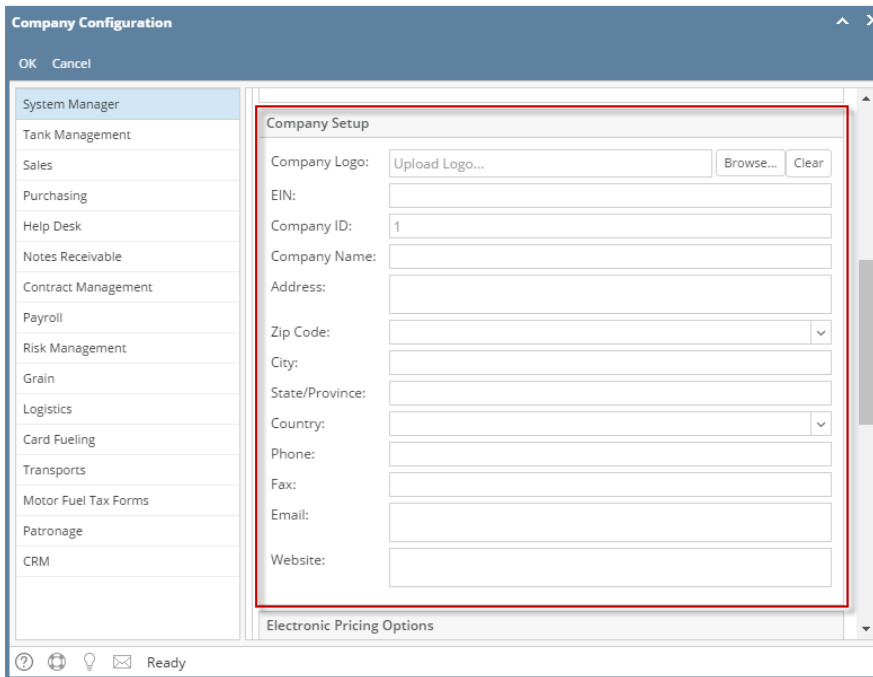
Forgot your password?

   b. I21 menu header

iRely LLC *** TEST ***

1. Log in as **Admin user**

2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**

3. Add a company logo by clicking on the Browse button then select the file that you would want as the company's logo

4. Enter a Company Name
   a. If Origin Integration is turned **ON**, **Company Name** field is disabled:

   b. If Origin Integration is turned **OFF**, **Company Name** field is enabled:

   Origin Integration on Company Configuration has already been turned off, so Company Name field is editable.

5. Enter the necessary details on the provided fields (**EIN,Company Name, Address, Zip Code, City, State/Province, Country, Phone, Fax, Email** and **Website**)
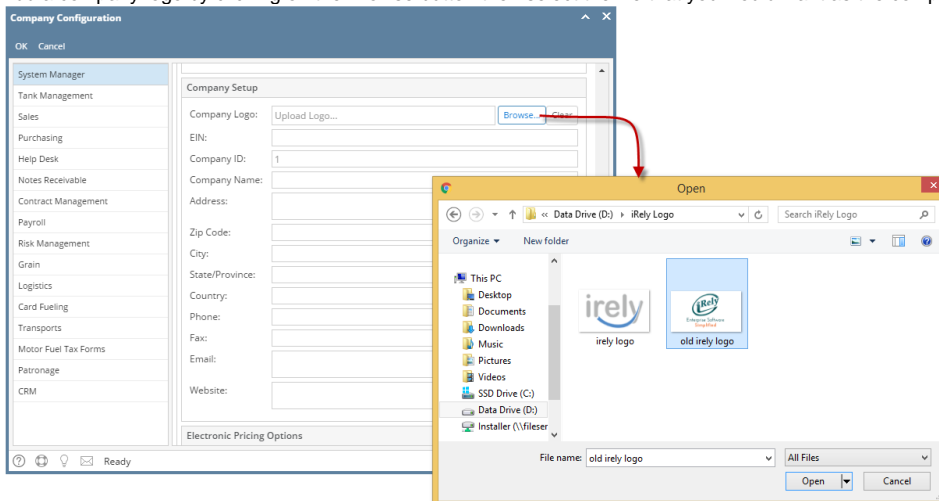
Company Setup		
Company Logo:	old irely logo.png	Browse... Clear
EIN:	001	
Company ID:	1	
Company Name:	i21 iRely Test Company	
Address:	4242 Flagstaff Cove	
Zip Code:	99926	
City:	Metlakatla	
State/Province:	AK	
Country:	United States	
Phone:	100-800-300	
Fax:	100-800-165	
Email:	irely@test.com	
Website:	http://www.test-iRely.com	

6. Click **OK** button to save the setup.
7. Reload i21 to apply the changes
    a. Login screen

Sign in to i21

User Name:	irelyadmin
Password:	••••••••
Company:	01

i21 iRely Test Company

Sign In   ☐ Remember me

Forgot your password?

    b. I21 menu header

i21 iRely Test Company

1. Log in as **Admin user**

2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**

3. Enter a Company Name
   a. If Origin Integration is turned **ON**, **Company Name** field is disabled:

   b. If Origin Integration is turned **OFF**, **Company Name** field is enabled:

   Origin Integration on Company Configuration has already been turned off, so Company Name field is editable.

4. Enter the necessary details on the provided fields (**Company Name, Address, Zip Code, City, State/Province, Country, Phone, Fax, Email** and **Website**)
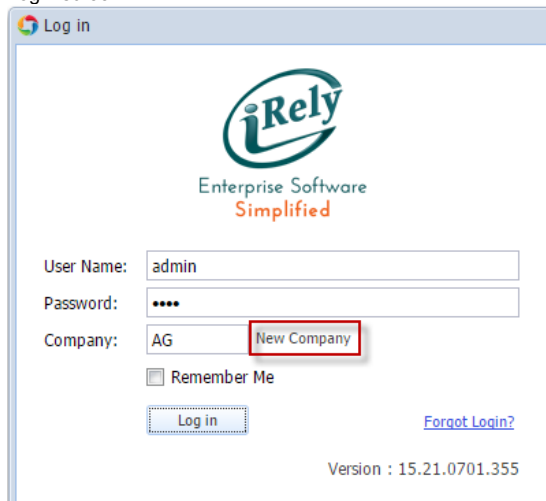

5. Click **OK** button to save the setup.
6. Reload i21 to apply the changes
   a. Login screen

   b. I21 menu header

1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Company Setup**
   a. If Origin Integration is turned ON, Company Name field is disabled:

   b. If Origin Integration is turned OFF, Company Name field is enabled:

c.
Origin Integration on Company Preferences has already been turned off, so Company Name field is editable.

3. Enter the necessary details on the provided fields (**Company Name, Address, Zip Code, City, State/Province, Country, Phone, Fax, Email** and **Website**)

4. Click **Save** toolbar button
5. Reload i21 to apply the changes

a. Login screen

b. iRely menu header