

# 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.

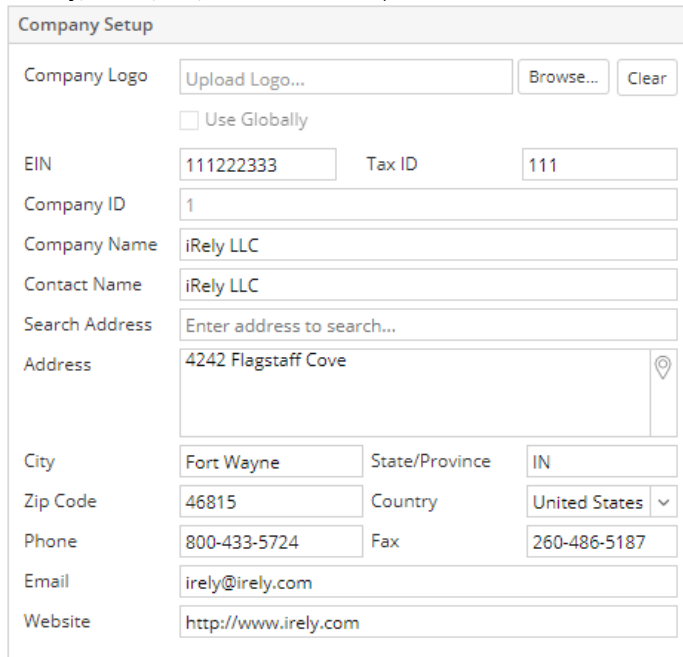
1. Log in as **Admin user**
2. On user's menu panel, go to **System Manager** folder then click **Company Configuration**
3. Add a company logo by clicking on the Browse button then select the file that you would want as the company's logo
  - a. Tick the **Use Globally** check box so that when a company 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	<input type="text" value="Change Logo..."/>	<input type="button" value="Browse..."/>	<input type="button" value="Clear"/>
	<input checked="" type="checkbox"/> Use Globally		
EIN	<input type="text" value="111222333"/>	Tax ID	<input type="text" value="AA1"/>
Company ID	<input type="text" value="1"/>		
Company Name	<input type="text" value="iRely LLC"/>		
Contact Name	<input type="text" value="iRely"/>		
Search Address	<input type="text" value="Enter address to search..."/>		
Address	<input type="text" value="4242 Flagstaff Cove"/>		
City	<input type="text" value="Fort Wayne"/>	State/Province	<input type="text" value="IN"/>
Zip Code	<input type="text" value="46815"/>	Country	<input type="text" value="United States"/>
Phone	<input type="text" value="800-433-5724"/>	Fax	<input type="text" value="260-486-5187"/>
Email	<input type="text" value="support@irely.com"/>		
Website	<input type="text" value="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
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**)

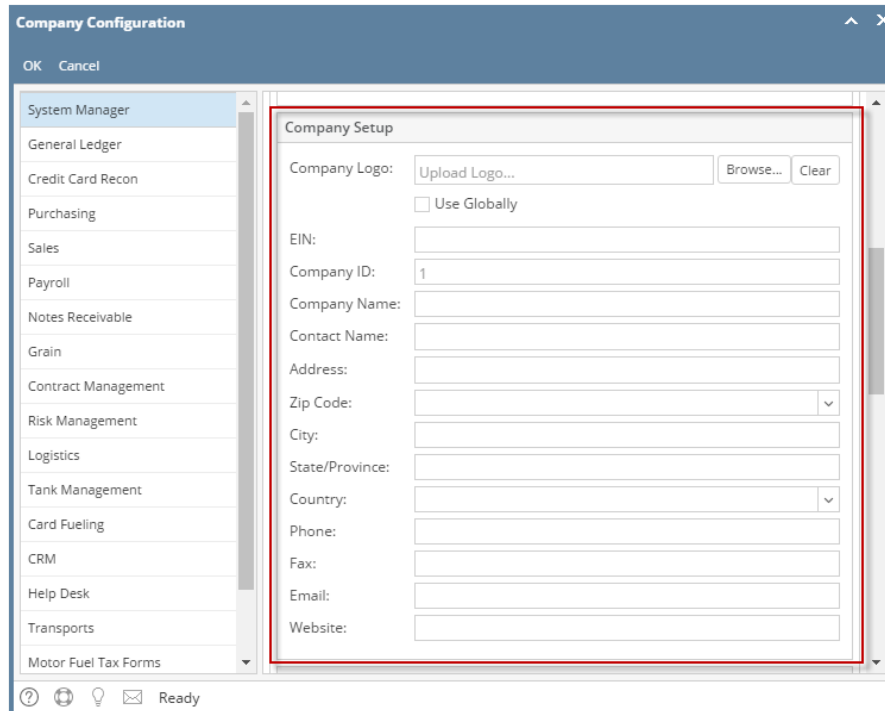


The image shows a 'Company Setup' form with the following fields and values:

Field	Value
Company Logo	Upload Logo... (with Browse... and Clear buttons)
Use Globally	<input type="checkbox"/>
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**



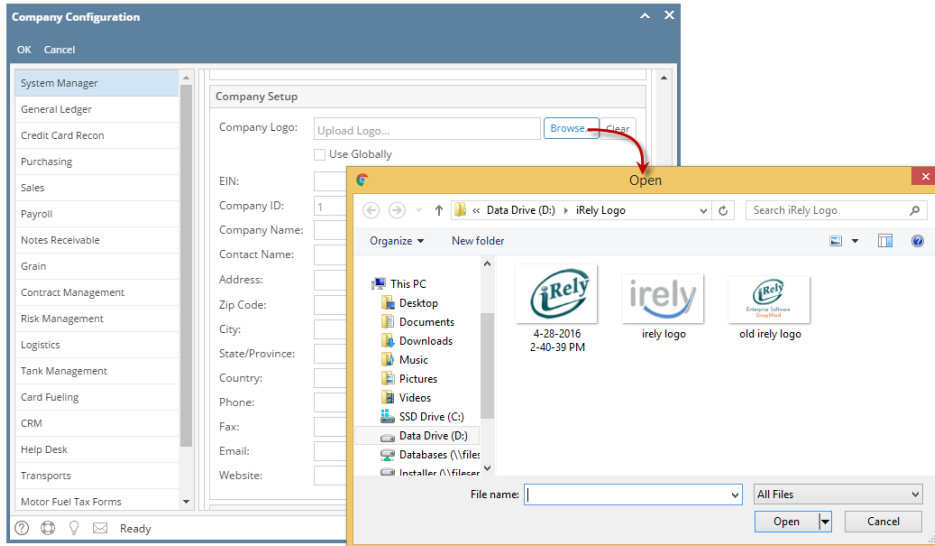
The image shows a 'Company Configuration' window with a sidebar menu and a main form area. The sidebar menu includes the following items:

- 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

The main form area is titled 'Company Setup' and contains the following fields:

Field	Value
Company Logo	Upload Logo... (with Browse... and Clear buttons)
Use Globally	<input type="checkbox"/>
EIN	
Company ID	1
Company Name	
Contact Name	
Address	
Zip Code	
City	
State/Province	
Country	
Phone	
Fax	
Email	
Website	

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

Company Logo:

☒ Use Globally

4. Enter a Company Name

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

Company Name:

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


Company Name:

*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:	<input type="text" value="4-28-2016 2-40-39 PM.png"/> <input type="button" value="Browse..."/> <input type="button" value="Clear"/>
	<input checked="" type="checkbox"/> Use Globally
EIN:	<input type="text" value="01"/>
Company ID:	<input type="text" value="1"/>
Company Name:	<input type="text" value="iRely LLC *** TEST ***"/>
Contact Name:	<input type="text" value="iRely LLC"/>
Address:	<input type="text" value="4242 Flagstaff Cove"/>
Zip Code:	<input type="text" value="46815"/> <input type="button" value="v"/>
City:	<input type="text" value="Fort Wayne"/>
State/Province:	<input type="text" value="IN"/>
Country:	<input type="text" value="United States"/> <input type="button" value="v"/>
Phone:	<input type="text" value="800-433-5724"/>
Fax:	<input type="text" value="260-486-5187"/>
Email:	<input type="text" value="irely-support@irely.com"/>
Website:	<input type="text" value="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:

☐ Remember me

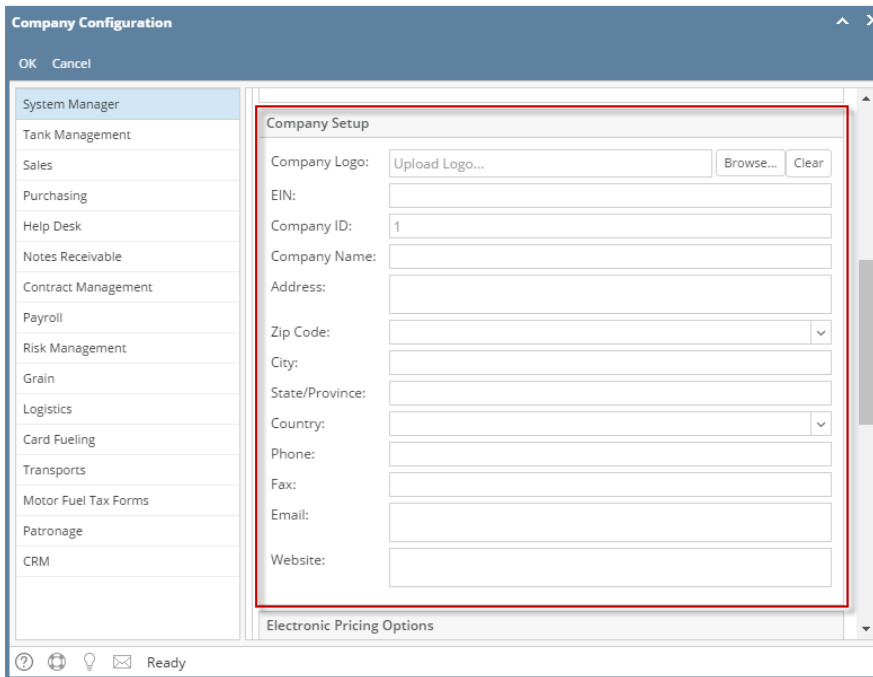
[Forgot your password?](#)

- b. i21 menu header

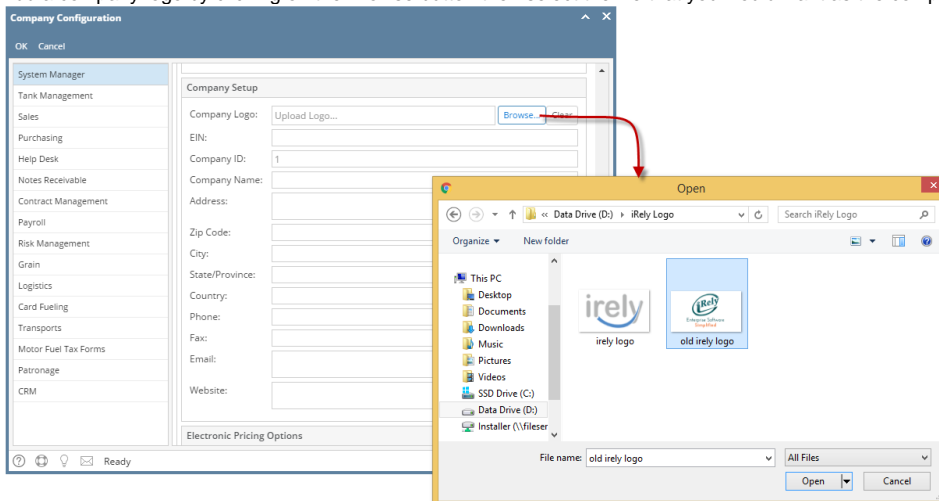
 **iRely LLC \*\*\* TEST \*\*\***

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:

Company Name: i21 Demo Setup Company

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


Company Name: i21 iRely Test Company

*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:	<input type="text" value="old irely logo.png"/> <input type="button" value="Browse..."/> <input type="button" value="Clear"/>
EIN:	<input type="text" value="001"/>
Company ID:	<input type="text" value="1"/>
Company Name:	<input type="text" value="i21 iRely Test Company"/>
Address:	<input type="text" value="4242 Flagstaff Cove"/>
Zip Code:	<input type="text" value="99926"/> ▼
City:	<input type="text" value="Metlakatla"/>
State/Province:	<input type="text" value="AK"/>
Country:	<input type="text" value="United States"/> ▼
Phone:	<input type="text" value="100-800-300"/>
Fax:	<input type="text" value="100-800-165"/>
Email:	<input type="text" value="irely@test.com"/>
Website:	<input type="text" value="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:

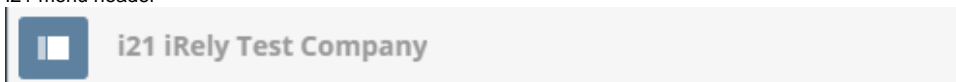
Password:

Company:  ▼

☐ Remember me

[Forgot your password?](#)

- b. 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

Tank Management

Sales

Purchasing

Help Desk

Notes Receivable

Contract Management

Payroll

Risk Management

Grain

Card Fueling

Transports

Tax Form

Patronage

Username: i21testcompany@gmail.com Password: .....

**Company Setup**

EIN:

Company ID:

Company Name:

Address:

Zip Code:

City:

State/Province:

Country:

Phone:

Fax:

Email:

Website:

Electronic Pricing Options

Interface System:

3. Enter a Company Name

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

Company Name:

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

**Company Setup**

EIN:

Company ID:

Company Name:

Address:

Zip Code:

City:

State/Province:

Country:

Phone:

Fax:

Email:

Website:

*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**)

The image shows a 'Company Configuration' window with a sidebar menu on the left and a main configuration area on the right. The sidebar menu includes options like System Manager, Tank Management, Sales, Purchasing, Help Desk, Notes Receivable, Contract Management, Payroll, Risk Management, Grain, Card Fueling, Transports, Tax Form, and Patronage. The main area is titled 'Company Setup' and contains the following fields:

- Username: i21testcompany@gmail.com
- Password: (masked with asterisks)
- EIN: (empty field)
- Company ID: 1
- Company Name: i21 Sample Company
- Address: Ayala Ave. Paseo de Roxas St.
- Zip Code: 1227
- City: Makati
- State/Province: NCR
- Country: Philippines
- Phone: +63.2.519.6490
- Fax: 63.2.519.6490
- Email: support@irely.com
- Website: https://www.irely.com

Below the Company Setup section is the 'Electronic Pricing Options' section, which includes an 'Interface System' dropdown menu.

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

The image shows the 'Log in' screen for the i21 Sample Company (Test Company). The screen features the i21 logo at the top. Below the logo are the following fields:

- User Name: Admin
- Password: (masked with asterisks)
- Company: 01 (dropdown menu showing 'i21 Sample Company (Test Company)')
- ☐ Remember Me
- Log in button
- [Forgot Login?](#)

At the bottom of the screen, it says 'Version : 15.41.0122.189'.

- b. i21 menu header

The image shows the i21 menu header, which is a red bar at the top of the application. It contains the i21 logo on the left and the text 'i21 Sample Company (Test Company)' on the right.

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:

The image shows the 'Company Name' field in the 'Company Setup' window. The field is disabled, and the text 'iRely Grain and Ag Co' is displayed in a light gray color.

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



The 'Company Setup' dialog box is shown with the following fields and values:

Field	Value
Company ID:	1
Company Name:	iRely Grain and Ag Co
Address:	
Zip Code:	
City:	
State/Province:	
Country:	
Phone:	
Fax:	
Email:	
Website:	

The status bar at the bottom shows 'Ready'.

c.

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

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

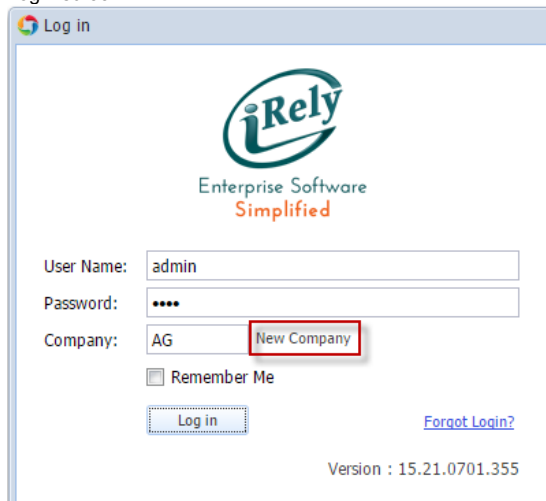
The 'Company Setup' dialog box is shown with the following fields and values:

Field	Value
Company ID:	1
Company Name:	New Company
Address:	United States
Zip Code:	42431
City:	Madisonville
State/Province:	KY
Country:	United States
Phone:	1234567
Fax:	7896542
Email:	company@email.com
Website:	www.company.com

The status bar at the bottom shows 'Edited'.

- Click **Save** toolbar button
- Reload i21 to apply the changes

a. Login screen



The login screen for iRely Enterprise Software Simplified. It features the iRely logo at the top, followed by the text "Enterprise Software Simplified". Below this are input fields for "User Name:" (containing "admin"), "Password:" (containing four dots), and "Company:" (containing "AG"). A red box highlights the "New Company" button next to the company field. There is a "Remember Me" checkbox and a "Log in" button. A "Forgot Login?" link is also present. The version number "Version : 15.21.0701.355" is displayed at the bottom right.

Log in

**iRely**  
Enterprise Software  
Simplified

User Name: admin

Password: ....

Company: AG **New Company**

☐ Remember Me

Log in

[Forgot Login?](#)

Version : 15.21.0701.355

b. iRely menu header

