How to Email Entity Contact Login

The email of the contact login credentials contains the User Name, Password, a link to the i21 application and a link to the Help Desk training videos. Note that SMTP Email Settings should first be configured to be able to send emails (see How to Setup SMTP Email Settings for instructions)



1 - (800) 433-5724 http://www.irely.com

From Entity Contacts Tab List:

- 1. Open an existing Entity record
- 2. Navigate to **Contacts** tab
- 3. Click Email Login button



From Entity Contacts Screen:

- 1. Open an existing Entity record
- 2. Navigate to Contacts tab
- 3. In the grid area, select the contact then click on the checkbox.

4. Click the Email Login button on User Portal Settings panel

Customer - abc1							^ 🗆	×
New Save Search Delete Unde	do Additional - Close							
Entity Customer General Lo	ocations Contacts Split	History Messages	Activities Attachm	nents Audit Log	Entity Type Custo	m Crop Insurance		
+ Insert 🗋 Open 🗙 Remove	Email Login Export - 8	B View - Filter (F3)						K L
Name* Email Dis	istribution Email (usernam	e) Title	Phone	Mobile	Location Name	Time Zone	Portal Acc	ass i
✓ test	beth.delapaz@i	irely		test	(UTC-04:00) Eastern	~		
contact 01	contact01@test	com			test	(UTC-04:00) Eastern	~	
contact U2	contact02@test	LCOM			test	(UTC-04:00) Eastern	Ŷ	
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Use	er Portal Creden	ntials sent s	uccessfully	-				
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From Entity | Contacts Tab List:

- Open an existing Entity record
 Navigate to Contacts tab
 Click Email Login button

Entity - 13	37-Ent																		
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Entity	General \	/endor	Split	Farm	Locat	ons	Contacts	Comment	ts (0) His	story	Attachme	nts (0)	Messages	Custom	Audit I	.og (4)			
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137-8	Ent				13	7-Ent@	irely.com							137-Ent Lo	cation	(UTC-11:00) Co	ordina	\checkmark	
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From Entity | Contacts Screen:

- Open an existing Entity record
 Navigate to **Contacts** tab

3. In the grid area, select the contact then click the Open button.

E	intity - 137-Ent										^ □	×
	New Save Search Refr	esh Undo Addition	al Close									
	Entity General Vendo	r Split Farm Lo	ocations Contacts	Comments (0)	History	Attachment	(0) Messages	Custom	Audit Log (4)			
L	+ Inser Q. Open X	Remove 🛛 Email Log	gin 铝 Layout 🔍	Filter Records	(F3)							
I	Name	Email Distribution	Email (username)	Title	Phon	ie	Mobile	Location Nan	ne Time	zone	Portal Access	Acti
	✓ contact2		contact2@test.com						(UTC-	12:00) Internatio	~	~
	contact1		contact1@test.com						(UTC-	12:00) Internatio	\checkmark	-
	137-Ent		137-Ent@irely.com					137-Ent Loca	tion (UTC-	11:00) Coordina	\checkmark	

4. Click the Email Login button on User Portal Settings panel

	Entity Contact - contac	:t2		_							~ X
	New Save Delete L	Jndo Close									
	Detail CRM Informati	ion Audit Log (2)	Additional Informaiton								
I	Full Name:	contact2			User Portal	Settings					
I	Email (username):	contact2@test.com	n	Add Photo	A Change P	assword	Em	ail Login	\sum		
I	Title:				Portal Acces	is: 🗸	User Rol	e: 137	-Ent's Help	Desk	~
I	Country:	Philippines		~	Username:	contact	2@test.@	om			
I	Timezone:	: (UTC-12:00) International Date Line West					st/1620.	210/i21/			
I	Phone:			ð	Contact Inf	ormation					
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- Open an existing Entity record
 Navigate to Contacts tab

3. Click Email Login button



From Entity | Contacts Screen:

- 1. Open an existing Entity record
- 2. Navigate to Contacts tab
- 3. In the grid area, select the contact then click the Open button.

Entity - 113-Ent											
New Save Search Refresh Delete Undo Additional - Close											
Entity Vendor Split	Farm Ship Via Locations Co	ntacts Comments (0)	History Atta	chments (0) Messa	ges Custom Au	udit Log (4)					
+ Insert Q Open X	Remove 🖂 Email Login 🔡 Layo	at Q Filter Record	ls (F3)								
Name	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Access	Active			
113a-Ent	113a-Ent@test.com					(UTC-11:00) Coordina		~			
113-Ent	beth.delapaz@irely.com		123-456		113-Ent Location	(UTC-11:00) Coordina	~	~			

4. Click the Email Login button on User Portal Settings panel

Entity Contact - 113-E	nt		
New Save Refresh	Delete Undo Close		
Detail Audit Log (0)	Ent 1		
Full Name:	113-Ent		User Portal Settings
Email (username):	beth.delapaz@irely.com	Add Photo	A Change Password 🖂 Email Login
Title:			Portal Access: V User Role: 113-Ent-2302
Phone:	123-456 Mobile:		Username: beth.delapaz@irely.com
Timezone:	(UTC-11:00) Coordinated Universal Time-11	~	Portal URL: localhost/1610.275/i21/
Contact Method:		~	Contact Information
Location Name:	113-Ent Location	~	+ Insert × Remove // Types
Department:			Type Details
Type:		~	
Email Distribution:		~	
Active:			
Notes:			
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	iRely i21		
	User Portal Credentials sent suc	ccessfully.	
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From Entity | Contacts Tab List:

- Open an existing Entity record
 Navigate to Contacts tab

3. Click Email Login button

Entity - 116-Ent								^ C
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Entity Vendor Split	Farm Ship Via Locations	Contacts Commen	ts (0) History	Attachments (0)	Audit Log (4)			
+ Insert Q Open X	Remove 🖂 Email Login 🔠 L	ayout 🔍 Filter F	Records (F3)					
✓ Name	Email (username)	Title	Phone	Mobile	Location Name	Timezone	Portal Acce	Active
✓ 116-Ent	beth.delapaz@irely.com		123-456	012133	116-Ent Location	(UTC-11:00) Coo	~	~
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	iR	ely i2 [°]	1			I		
	1 of 1 ema	il successfu	Illy sent.					
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From Entity | Contacts Screen:

- Open an existing Entity record
 Navigate to Contacts tab
 In the grid area, select the contact then click the Open button.

Entity - 116-Ent								~ □ >
New Save Search Re	rresit Delete Ondo Addition							
Entity Vendor Split	Farm Ship Via Locations	Contacts Comm	ients (0) History	Attachments (0) Audit Log (4)			
+ Insert Q Open X	Remove 🖂 Email Login 🔡 L	Layout C Filte	r Records (F3)	Makila	Lessies Nees	T	Dentel Area	A set us
✓ Name	beth delanar@irely.com	Title	123.456	012133	116 Ent Location	(UTC 11:00) Coo	Portal Acce	Active
Click the Email	L ogin toolbar butto ct - 116-Ent	on						~ X
New Save	Refresh Delete	Undo E	mail Login	Change	Password	Close		
Detail Au	dit Log (1)							
This message w	ill show when ema	ail is sent						
	(i				6		
	iR	elv i2	21					
	1 of 1 ema	il successi	fully sent.					
		OK						