

## Add New User

Last Modified on 01/07/2025 4:19 pm EST

# Add New User

*Records > Vendors*

Two ways of adding a new user to the Vendor Portal are outlined below.

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## Option 1

*Records > Vendors > Edit*

On the edit vendor screen, there is a vendor portal button.

The info within this dialog box will auto-populate based on the information on the vendor edit page:

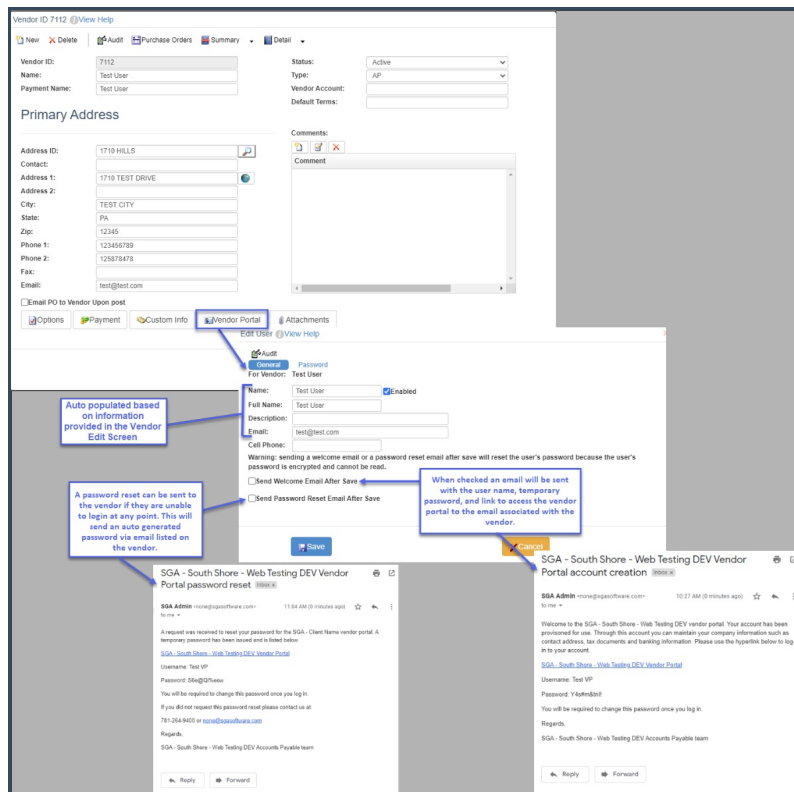
- **Name:** The username for the specific vendor. It will initially default to the Vendor name.
- **Full Name:** Based on the Payment Name given on the vendor edit screen

### **Send Email Notification After Save:**

- When checked, this will send an auto-generated email with the username, temporary password, and link to access the vendor portal to the email associated with the vendor. As shown in the screenshot below.

### **Send Password Reset Email After Save:**

- A password reset can be sent to the Vendor if they are unable to log in at any point. This will send an auto-generated password via the email listed by the vendor.



## Option 2 Users > Vendor Portal Users

You can add a new VP user from the list of vendors already created in the system or edit an existing VP user on this screen.

- **New:** You will select the magnifying glass to search choose from the Vendors within the system. You can then send them the welcome email and reset passwords from this page.
- **Edit:** The vendor information has already been filled out. You can send a password reset email or resend the welcome email if needed.

### Send Email Notification After Save:

- When checked, this will send an auto-generated email with the username, temporary password, and link to access the vendor portal to the email associated with the vendor. As shown in the screenshot below.

### Send Password Reset Email After Save

- A password reset can be sent to the vendor if they are unable to log in at any point. This will send an auto-generated password via the email listed on the vendor.

Sign On Help Favorites

SGA Users

Vendor Portal Users

Groups

Permissions

Account/Object

Approval Branch

Applications

Tasks

Options

System Log

Activity Monitor

AAAQ AAAQ

SGA - South Shore - Web Testing DEV - Accounting - Vendor Portal Users

Home Records Daily Budgets Reporting Tools Setup Month End Sign On Help Favorites

Permissions New Edit View Vendor View Vendor Uploaded Invoices Delete Audit Reports

User: Search

User	Full Name	Description	Email	Vendor ID	Vendor Name	Enabled
AAAQ	AAAQ					

General Password

Vendor ID:

Name:   Enabled

Full Name:

Description:

Email:

Cell Phone:

Warning: sending a welcome email or a password reset email after save will reset the user's password because the user's password is encrypted and cannot be read.

Send Welcome Email After Save

Send Password Reset Email After Save

Save Cancel

SGA - South Shore - Web Testing DEV Vendor

Portal account creation

SGA Admin <none@sgasoftware.com> 10:27 AM (0 minutes ago)

to me

Welcome to the SGA - South Shore - Web Testing DEV vendor portal. Your account has been provisioned for use. Through this account you can maintain your company information such as contact address, tax documents and banking information. Please use the hyperlink below to log in to your account.

[SGA - South Shore - Web Testing DEV Vendor Portal](#)

Username: Test VP

Password: Y4\$Rm2nll

You will be required to change this password once you log in.

Regards,

SGA - South Shore - Web Testing DEV Accounts Payable team

Reply Forward

SGA - South Shore - Web Testing DEV Vendor

Portal password reset

SGA Admin <none@sgasoftware.com> 11:04 AM (0 minutes ago)

to me

A request was received to reset your password for the SGA - Client Name vendor portal. A temporary password has been issued and is listed below:

[SGA - South Shore - Web Testing DEV Vendor Portal](#)

Username: Test VP

Password: SGe@Q!\$eaw

You will be required to change this password once you log in.

If you did not request this password reset please contact us at: 781-264-9400 or [soas@sgasoftware.com](mailto:soas@sgasoftware.com)

Regards,

SGA - South Shore - Web Testing DEV Accounts Payable team

Reply Forward

You can add a New VP User from the list of already created vendors in the system or to edit an existing VP user on this screen

New VP User: You will select the magnifying glass to search choose from the Vendors within the system. You will then be able to send them the welcome email as well as reset passwords from this page.

Edit VP User: The Vendor information is already filled in. You can send a password reset email if needed or resend the welcome email.

A password reset can be sent to the vendor if they are unable to login at any point. This will send an auto generated password via email listed on the vendor.

When checked an email will be sent with the user name, temporary password, and link to access the vendor portal to the email associated with the vendor.