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Add New User

Records > Vendors

There are two ways of adding a new user to the Vendor Portal, which are outlined below.

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:

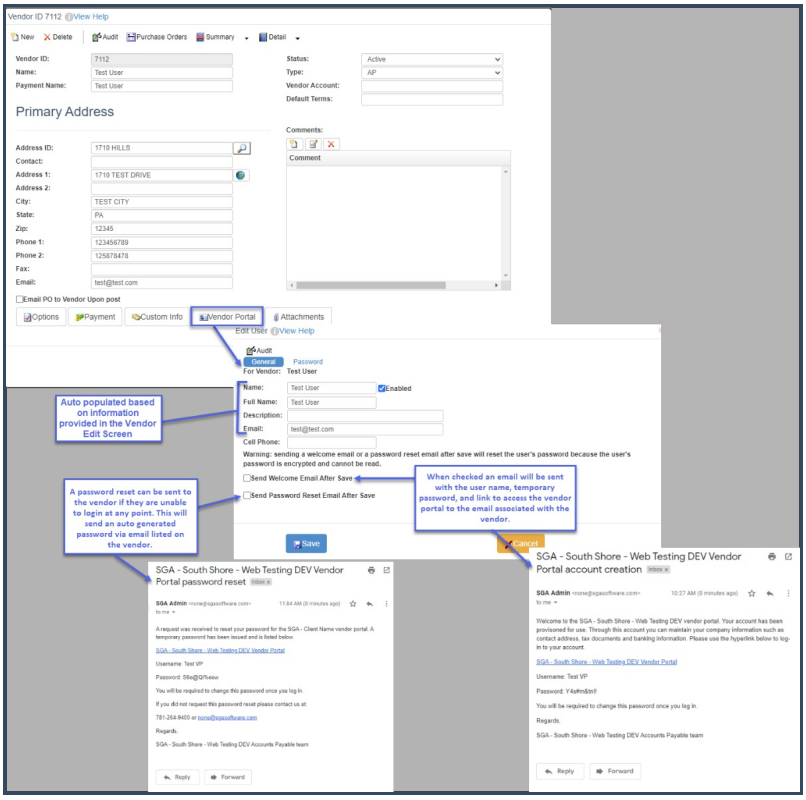
- **Name:** The username for the specific vendor. It will initially default to the Vendor name.
- **Full Name:** Based on the Payment Name given on the vendor edit screen

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:

- If the Vendor is unable to log in at any point, a password reset can be sent. 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.

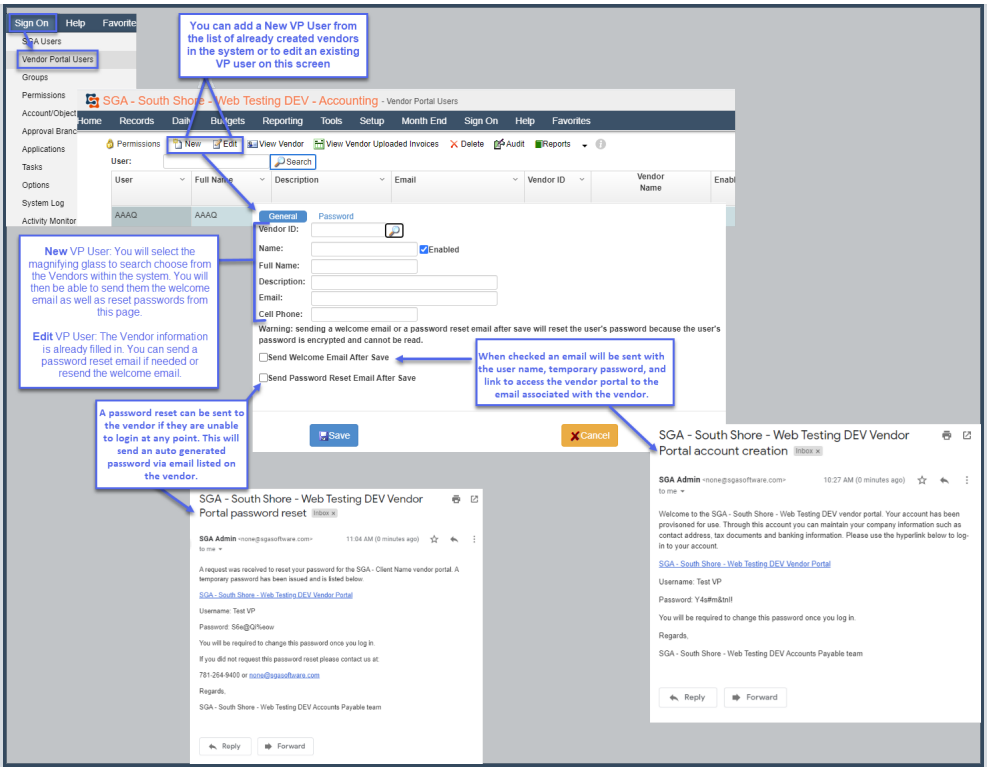
- **New:** You will select the magnifying glass to search and choose from the Vendors within the system. You can then send them the welcome email and reset passwords from this page.
- **Edit:** The vendor information has already been filled out. You can send a password reset email or resend the welcome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

- If the vendor is unable to log in at any point, a password reset can be sent. This will send an auto-generated password via the email listed on the vendor's profile.


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.
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.
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.
SGA - South Shore - Web Testing DEV Vendor Portal password reset
SGA - South Shore - Web Testing DEV Vendor Portal account creation