

# Add New User

Last Modified on 05/05/2023 2:06 pm EDT

There are two ways of adding a new user to the Vendor Portal 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:

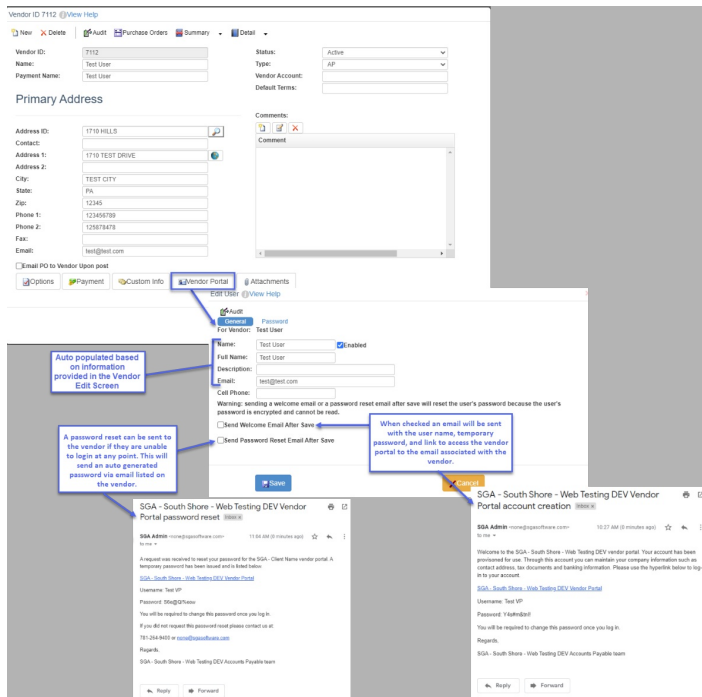
- **Name:** The username for the specific vendor. It will initially default to the Vendor name.
- **Full Name:** Based on the Payment Name given on vendor edit screen

### Send Email Notification After Save:

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

### Send Password Reset Email After Save:

- 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.



## Option 2

## Users > Vendor Portal Users

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

### Send Email Notification After Save:

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

### Send Password Reset Email After Save

- 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.

The screenshot shows the 'Vendor Portal Users' management interface. A callout box at the top states: "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." Below this, a table lists users with columns for User, Full Name, Description, Email, Vendor ID, and Vendor Name. A callout points to the 'New' button: "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." Another callout points to the 'Edit' button: "Edit VP User: The Vendor information is already filled in. You can send a password reset email if needed or resend the welcome email." Below the table, there are two checkboxes: "Send Welcome Email After Save" and "Send Password Reset Email After Save". A callout for the first checkbox says: "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 callout for the second checkbox says: "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." The interface also shows a 'Save' button and a 'Cancel' button. Below the interface, two email screenshots are shown. The first is a 'Portal password reset' email from SGA Admin, dated 11:04 AM, with a subject line 'SGA - South Shore - Web Testing DEV Vendor Portal account creation'. The second is a 'Portal account creation' email from SGA Admin, dated 10:27 AM, with a subject line 'SGA - South Shore - Web Testing DEV Vendor Portal account creation'. Both emails contain a welcome message, a temporary password, and a link to the vendor portal.