

## Inviting New Suppliers to Mtivity

## Process of Inviting New Suppliers

In order to set up a new user one needs to perform the following steps:

Go to the Address Book section in the main menu.

DASHBOARD | JOB BAG | ADDRESS BOOK | PERSONAL SETUP | ADMIN

Select the **Contacts** tab in the lower menu.



Select **New** under the Tools section on the right hand side.



This will open the New Contact screen. Fill in the details of the new contact and click **Next.** 

Saturtation	Choose One 💌	* E-mail	supplier5@zoho.com
First Name	John	Work Telephone	
Niddle Initials		Nobile Telephone	
Last Nane	Smith	Howe Telephone	
Account		Other Telephone	
Company		Fax	
Department		Personal Websile	
Sile		Job Title	
Cost Centre			
Address 1			
Address 2			
Address 3			
City			
State/County			
Country	Choose One 💌		
Zip/Postcode			
Share Contact	With XI Coleagues	Auto Symc	With Contact's Personal Details
	Catablish Washing Balationship		1

This will open the Select Account screen. Select **New Account** and click **Next**.

## INVITE CONTACT - SELECT ACCOUNT

Select the Account your new (	Contact(s) belongs to.	
Click Next to continue.		
Invitation From	John Manager	
Invitation To	John Smith	
*Account	My Account - Mitrity Test Account Selected Account ENew Account	k

Now enter the details of the new supplier company that it is going to be created and click **Next.** 

INVITE CONTACT - NE	WACCOUNT	
Enter the Account Name and a	ny address details you may know for Contact(s) John Smith .	
Click Next to continue.		
Invitation From	John Wanagor	
Invitation To	John Smith	
*Account Nanc	John Smith	
Address 1		
Address 2		
Address 3		
City		
State/County		
Country	Choose Dre 💌	
Zip/Postcode		
		Next Back Cancel

Here you can customize the invitation message if required. Click on **Invite** to send the invitation email to your supplier.

INVITE CONTACT - CU	ISTOMISE MESSAGE	
If you would like to edit the me	essage which is sent with this invitation, you may do so in the area below.	
Jick Invite to send the invite	tion.	
Invitation From	John Manager	
Invitation To	John Smith	
Account	John Smith	
Subject	User Information	
Hessage	Interestly dated using Weiking it is non-preferenced usin flow tool for people in marketing, and all of people I transitions and transitioning all studyers desci. If though you might should be checked in all the second and its memory projects to people. The people and people is the second and its memory projects to people. The people of the second and the second and the second and the second thou yest encoplement years to represent and uses. It have come and the second mark the second second mark of years the mediate second and the second and the second mark of years the second people second second second second second second second second second second mark of years the mediate second	

## Accepting an Invitation

Your supplier will receive an invitation from "Notifications". This will contain their username and an automatically generated temporary password.

YOUR ACCOUNT DETAILS: USERNAME: <u>supplier5@zoho.com</u> PASSWORD: RDeTqIZp TO ACCEPT THIS INVITATION: Follow these 3 steps

1) Go to the invitation acceptance page by clicking the following link:

 $\label{eq:https://web1.mtivity.com/apps/DcLogin.csp?inviteUsername=supplier5@zoho.com&invitePassword=RDeTqIZp8 action=newInvitation$ 

They need to click the link in the email under step 1.



This will take them to the invitation acceptance screen, with their username and password already entered. Your supplier will click the **Login** button.

To accept this Invit	ation please Log-in and	complete the sign	up process.	
If you have any pro	blems accepting this inv	itation please cor	ntact Support eith	er by
Username:				
supplier5@zoho.co	m			
Password:				

Next, they should accept the terms and conditions and enter a new password. They will need to confirm the password to ensure no mistakes have been made and click **Next** to continue.

mtivity	
MTIVITY SIGNUP - A	CCEPT TERMS & CHANGE PASSWORD - STEP 1 OF 3
Welcome to Mtivity. Please re	ad our terms and conditions of use before continuing.
f you have already registered please click here.	I with Mtivity and would like to accept this invitation from your existing account,
I have read and accept th	e Mtivity terms and conditions of use.
The password you have been password now to one of you your Mtivity username or e-	) provided with has been randomly generated by the Mtivity system. Please change this r choosing. This new password must be at least 6 characters in length, may not contain mail address, and is case-sensitive.
* New Password	
* Confirm New Password	
	Next Cancel

Your supplier will check if their details are correct, enter any missing information and click **Next** to continue.

Salutation	Choose One	E-mail	supplier5@zoho.com
First Name	John	Work Telephone	-
Middle Initials		Mobile Telephone	
Last Name	Smith	Home Telephone	
Personal Website		Other Telephone	
Job Title		Fax	
Address 1			
Address 2			
Address 3			
City			
State/County			
Country	Choose One	•	
Zip/Postcode			

If they are the first user in the company they will also be asked to confirm their company details. This is the final step in the process - they need to click **Done** to create the account.

I IVITY SIGNUP -	COMPANY DETAILS - PA	AGE 3 OF 3		
Name	John Smith	Telephone		
E-mail		Fax		
Registration Number		VAT Number		
Copy Personal Address		Copy Invoice Address		
Invoice Address 1		Delivery Address 1		
Invoice Address 2		Delivery Address 2		
Invoice Address 3		Delivery Address 3		
Invoice City		Delivery City		1
Invoice State/County		Delivery State/County		1
Invoice Country	Choose One	Delivery Country	Choose One	
Invoice Zip/Postcode		Delivery Zip/Postcode		1

Your supplier is now a signed-up user. When you send them a new RFQ or Purchase Order they will receive an email notification. They only need to click the link in the email, log in, and they will be taken directly to the item where pricing can be entered or the Purchase Order accepted.