



CPL SOFTWARE

PARTNERS TO PROPERTY FACTORS
& BLOCK MANAGERS

**AUTHORISING NEW WEB USER
ACCOUNTS TRAINING GUIDE
TRAINING GUIDE**

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INTRODUCTION

The CPL Client Portal and Client Web App provide you with a company branded online space to share information and allow your clients to interact with you and submit payment at any time.

This training guide outlines the steps to enable you to authorise your new web user accounts via the Custom Desktop within CPL.

REGISTERING VIA THE CLIENT PORTAL

Please note that the new web user must have first completed their **Registration** via the Client Portal and also verified their email address.

Log On

Please enter your Username1 and Password1. [Register](#) if you do not have an account.

As the Client's **Account Number**, **Surname**, **Address** and **Post Code** are the details you use to verify their validity it is essential that the client ensures they are correctly entered during the registration process.

Create a New Account

Use the form below to create a new account.

Choose a new username and password. You will use this to log in once

Passwords are required to be a minimum of 6 characters in length.

Account Information

Choose User name

Email address

Choose Password

Confirm password

Surname

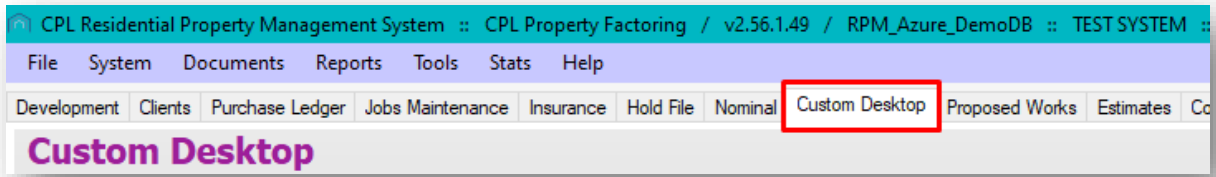
Account Number

Address

Post Code

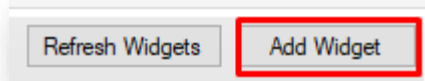
AUTHORISING A WEB USER VIA THE CUSTOM DESKTOP

On the CPL main screen select the **Custom Desktop** tab.

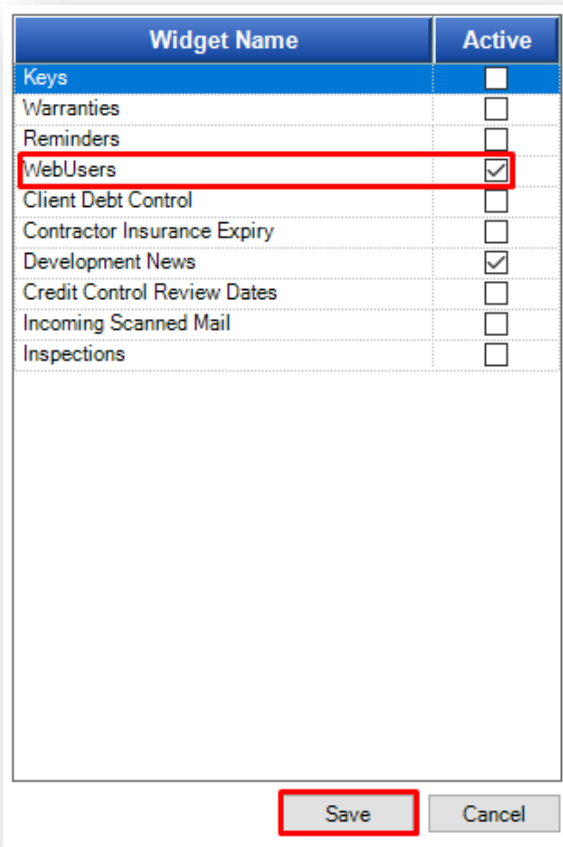


This will open the Custom Desktop screen. This screen allows you to add a number of **Widgets** allowing additional interaction with various different modules in CPL.

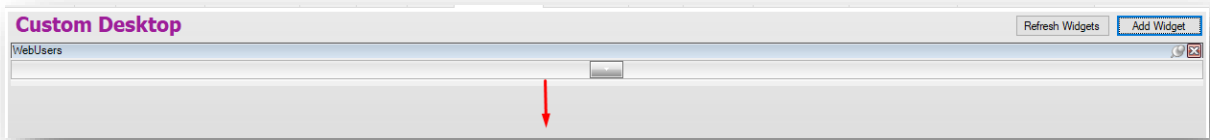
In the right-hand corner of this screen there are two buttons, click on **Add Widget**.



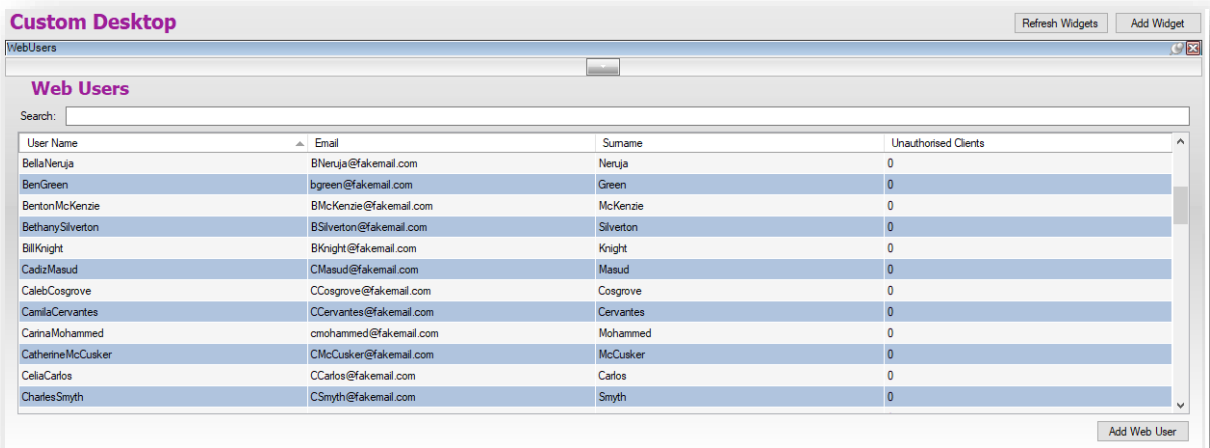
A window will appear, showing available and active **widgets** for the Custom Desktop. Tick the box alongside **WebUsers**, if this is not already ticked and then click on the **Save** button.



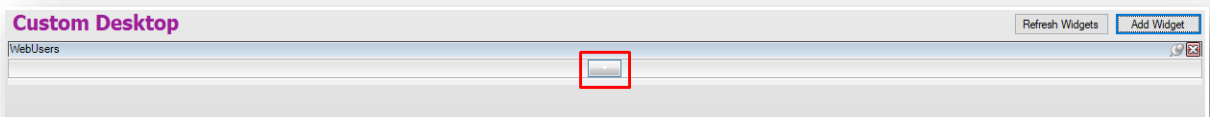
To view the widget in its entirety you may need to drag the middle of the bar further down the screen.



Click on the **Refresh Widgets** button on the right of the screen and all web users will be displayed.



As you only want to check for any unauthorised users you can filter the results in this grid by clicking the grey tab in the centre of the screen.



This offers you a filter selection where you can opt to **Show Unauthorised Only**. Tick this box and click on the **Save** button.

Custom Desktop

WebUsers

Settings

Limit Records: 200

Show Inactive:

Show Unauthorised Only:

Filter Inspector: KA Karen Ann

Save Cancel

The unauthorised web users should now be displayed.

Web Users

Search: _____

User Name	Email	Surname	Unauthorised Clients
0008010SHay	karen-ann.mcswiggan@cplsoftware.com	Hay	1

To authorise a web user, double-click on their entry in the list.

A new **Update Web User** window will open.

Update Web User

Web User Name: 0008010SHay Email: karen-ann.mcswiggan@cplsoftware.com

Password: Email Verified:

Confirm Password: Surname: Hay

Change Password: Inactive:

Linked Accounts

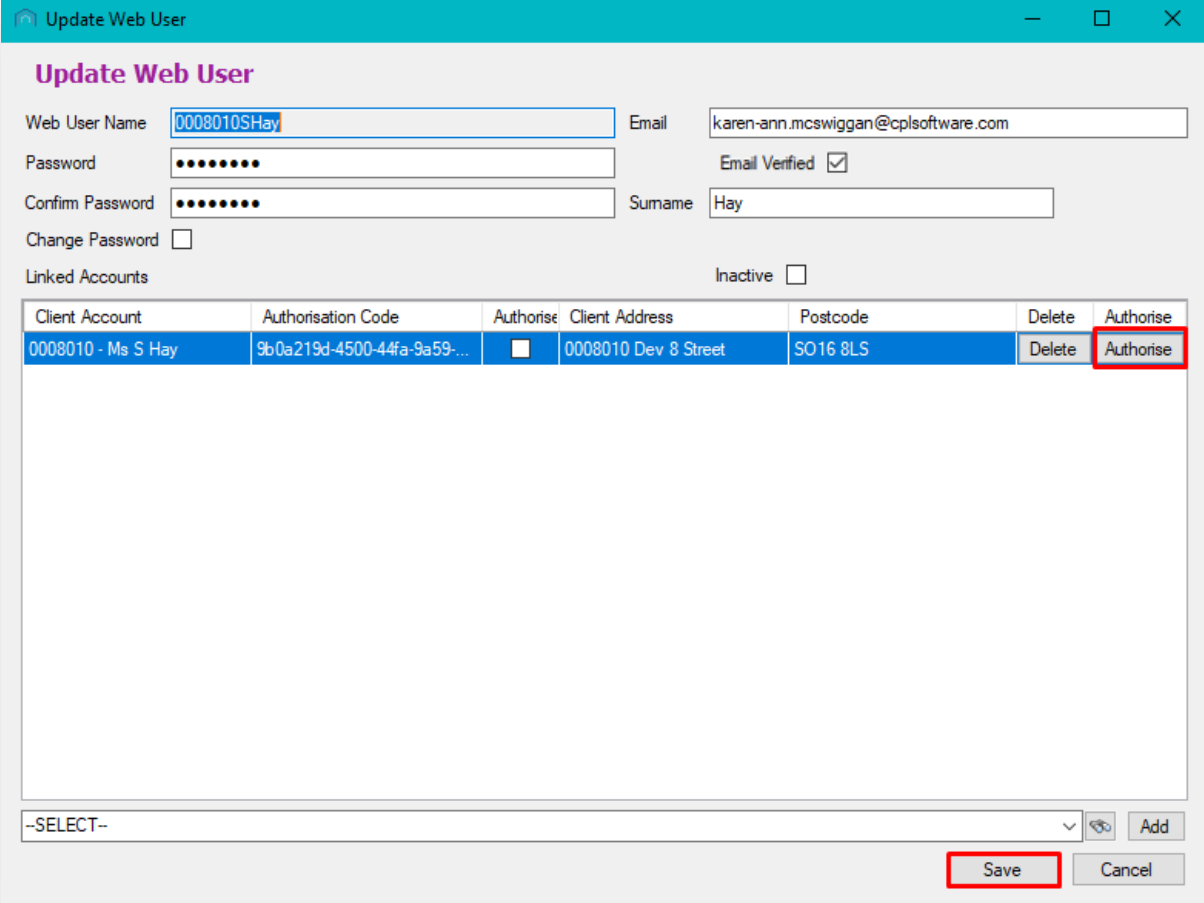
Client Account	Authorisation Code	Authorise	Client Address	Postcode	Delete	Authorise
0008010 - Ms S Hay	9b0a219d-4500-44fa-9a59-...	<input type="checkbox"/>	0008010 Dev 8 Street	SO16 8LS	Delete	Authorise

~-SELECT- [v] [Add]

Save Cancel

Make sure that all details within the fields match the details on the **Client Account** for that individual in CPL.

If you are satisfied that this is a valid user then click **Authorise** on the right of the screen and then on the **Save** button towards the bottom.



Update Web User

Web User Name: 0008010SHay | Email: karen-ann.mcswiggan@cplsoftware.com

Password: [masked] | Email Verified:

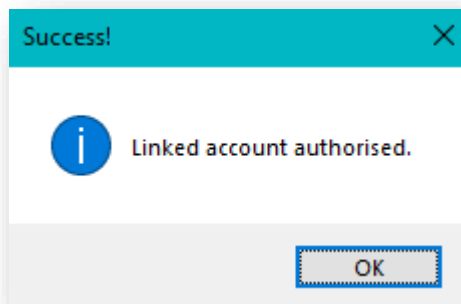
Confirm Password: [masked] | Surname: Hay

Change Password: | Inactive:

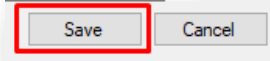
Client Account	Authorisation Code	Authorise:	Client Address	Postcode	Delete	Authorise
0008010 - Ms S Hay	9b0a219d-4500-44fa-9a59-...	<input type="checkbox"/>	0008010 Dev 8 Street	SO16 8LS	Delete	Authorise

--SELECT-- | Add | Save | Cancel

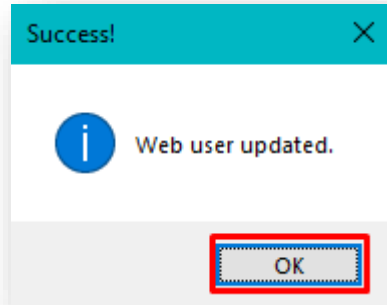
A **Success!** pop-up window will open telling you that the linked account has been authorised.



Click on **OK** to dismiss this and then click on the **Save** button towards the bottom of the screen.



A **Success!** pop-up window will open telling you that the linked account has been updated.



Click on **OK** to close this. You will note that the **Authorised** tickbox is now also checked in the **Update Web User** window.

Update Web User

Web User Name: 0008010SHay Email: karen-ann.mcswiggan@cplsoftware.com

Password: Email Verified:

Confirm Password: Surname: Hay

Change Password:

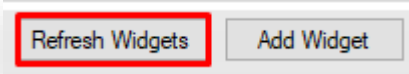
Linked Accounts: Inactive

Client Account	Authorisation Code	Authorised	Client Address	Postcode	Delete	Authorise
0008010 - Ms S Hay	9b0a219d-4500-44fa-9a59-...	<input checked="" type="checkbox"/>	0008010 Dev 8 Street	SO16 8LS	Delete	Authorise

--SELECT-- Add

Save Cancel

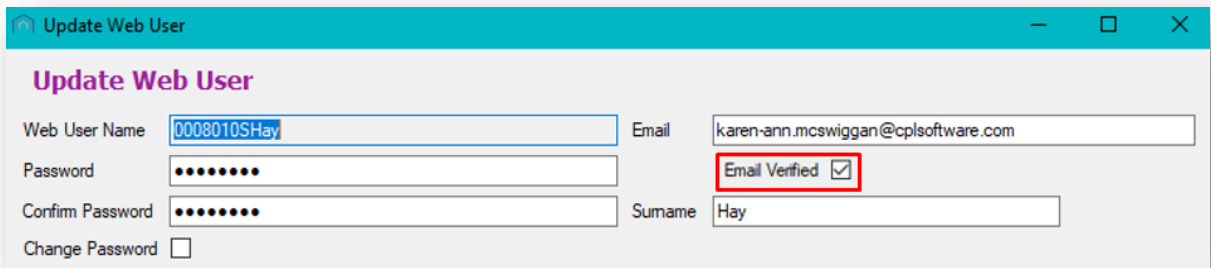
When the widget is refreshed by clicking on the **Refresh Widgets** button again in the top-right of the screen, the newly authorised account will have disappeared from the list of unauthorised users.



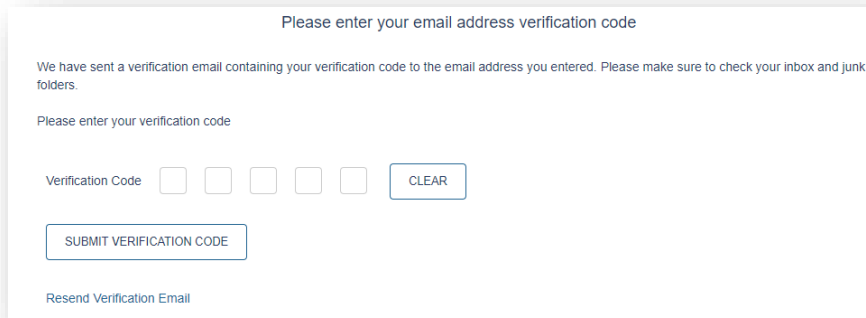
You can repeat the whole previously outlined process to authorise any additional web users.

CLIENT EMAIL VERIFICATION

Please note that, as previously mentioned, the ability to authorise new web users is dependent upon the client having already verified their email address. If a web user account doesn't appear in the **Show Unauthorised Only** list then this is something you may wish to check with the client although you should be able to see from the **Update Web User** screen if they have already validated their email.



They should have received an email asking them to verify their email address. When this has been done, they are sent a verification code via email which they can then enter into the Portal.



This will complete their registration process.



CPL KNOWLEDGE BASE

This training guide forms part of CPL's Knowledge Base which is available for all CPL users at <https://contact.cplsoftware.com/portal/home>

The CPL Knowledge Base will be continually updated with additional guides and information. If you have any questions or suggestions for further guides we'd be happy to hear from you. You can contact CPL Support by emailing us at support@cplsoftware.com or through our portal at <https://contact.cplsoftware.com/portal/home> or calling us on 0345 646 0240 (option 1).

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