

AUTHORISING NEW WEB USER ACCOUNTS TRAINING GUIDE

TRAINING GUIDE

APRIL 2020

Version 1.4



CONTENTS

ntroduction	3
Registering via the Client Portal	3
Authorising a Web User via the Custom Desktop	4
Client Email Verification	9
CPL Knowledge Base	10



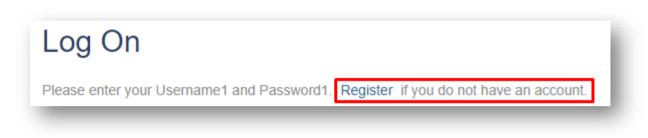
INTRODUCTION

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.



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.

С	reate a New Account
Jse	the form below to create a new account.
Cho	ose a new username and password. You will use this to log in once
as	swords are required to be a minimum of 6 characters in length.
Α	account Information
С	hoose User name
E	mail address
C	hoose Password
C	onfirm password
S	urname
A	ccount Number
	ddress
P	ost Code



AUTHORISING A WEB USER VIA THE CUSTOM DESKTOP

On the CPL main screen select the Custom Desktop tab.

in CPL Residentia	l Property Manage	ment System 🙁 CP	L Property F	actoring	/ v2.56.1	.49 / RPM_Azur	e_DemoDB :: Ti	EST SYSTEM	1 ::
File System	Documents R	eports Tools Sta	ats Help						
Development Clie	nts Purchase Ledg	er Jobs Maintenance	Insurance	Hold File	Nominal	Custom Desktop	Proposed Works	Estimates	Co
Custom	Desktop		_	_	_			_	J

This will open the Custom Desktop screen. This screen allows you to add a number of **W idgets** 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.

Refresh Widgets	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.

Keys	
Warranties	
Reminders	
WebUsers	\checkmark
Client Debt Control	
Contractor Insurance Expiry	
Development News	
Credit Control Review Dates	
Incoming Scanned Mail	
Inspections	
	Save Cancel



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

ustom Desktop	Refresh Widgets Add Widget
bUsers	<u> I</u>

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

bUsers				<u>9</u>
				196
Web Users				
Search:				
User Name	A Email	Sumame	Unauthorised Clients	^
BellaNeruja	BNeruja@fakemail.com	Neruja	0	
BenGreen	bgreen@fakemail.com	Green	0	
BentonMcKenzie	BMcKenzie@fakemail.com	McKenzie	0	
BethanySilverton	BSilverton@fakemail.com	Silverton	0	
BillKnight	BKnight@fakemail.com	Knight	0	
CadizMasud	CMasud@fakemail.com	Masud	0	
CalebCosgrove	CCosgrove@fakemail.com	Cosgrove	0	
CamilaCervantes	CCervantes@fakemail.com	Cervantes	0	
CarinaMohammed	cmohammed@fakemail.com	Mohammed	0	
CatherineMcCusker	CMcCusker@fakemail.com	McCusker	0	
CeliaCarlos	CCarlos@fakemail.com	Carlos	0	
CharlesSmyth	CSmyth@fakemail.com	Smyth	0	
				v

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.

Custom Desktop	Refresh Widgets Add Widget
/lebUsers	

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



Custom Des	ktop	_
Settings		
Limit Records	200	
Show Inactive		
Show Unauthorised Only		
Filter Inspector	KA Karen Ann	~
Save	Cancel	

The unauthorised web users should now be displayed.

Email	Sumame	Unauthorised Clients	
karen-ann.mcswiggan@cplsoftware.com			

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

A new Update Web User window will open.

Update Web U	ser						-	
Update We	eb Usei	r						
Web User Name	0008010S	Hay		Email	karen-anr	.mcswiggan@cplsoftware.com		
assword	•••••	•			Email Ver	fied		
onfirm Password	•••••	•		Sumame	Hay			
Change Password								
inked Accounts					Inactive			
Client Account		Authorisation Code	Authorise	Client Address		Postcode	Delete	Authorise
0008010 - Ms S Ha	ау	9b0a219d-4500-44fa-9a59		0008010 Dev 8 Str	eet	SO16 8LS	Delete	Authorise
SELECT-							~	S Add
-SELECT-						Savi		S Add

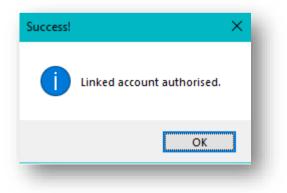


Make sure that all details within the fields match the details on the **Client Account** for that individual in CPL.

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 Us	ser							—		×
Update We	eb User									
/eb User Name	0008010S	Hay			Email	karen-ann	.mcswiggan@cplsoftware.	.com		
assword	•••••	•				Email Ver	fied 🗹			
onfirm Password	•••••	•			Sumame	Hay				
hange Password nked Accounts						Inactive				
Client Accounts		Authorisation Code	Authorise	Charle		Inactive	Postcode	Delete	0.41	
Ulient Account 008010 - Ms S Ha	w	9b0a219d-4500-44fa-9a59			oaress 0 Dev 8 Str	eet	SO16 8LS	Delete		orise orise
ELECT-									8	Add
SELECT								Save	Canc	

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.



Save	Cancel

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

Success!	×
	Web user updated.
	ОК

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

0008010 - Ms S Hay 9b0a219d-4500-44fa-9a59 ☑ 0008010 Dev 8 Street SO16 8LS Delete Auth	×		—					ser	Update Web Us
Password Password Imai Verified Imai Ve								eb User	Update We
-SELECT-				gan@cplsoftware.com	aren-ann.mcswiggan@c	Email		0008010SHay	Veb User Name
Change Password Linked Accounts Inactive Linked Account Authorisation Code Authorised Client Address Postcode Delete Auth 0008010 - Ms S Hay 9b0a219d-4500-44fa-9a59 I 0008010 Dev 8 Street SO16 8LS Delete Auth]	Email Verified 🗹]		•••••	assword
Linked Accounts Inactive Client Account Authorisation Code Authorised Client Address Postcode Delete Autho008010 - Ms S Hay 9b 0a 219d 4500 44fra - 9a 59 Image Double V 8 Street S016 8LS Delete Authone Authorised Street S016 8LS Delete Authone Authone Street S016 8LS Delete Street S016 8LS Delete Authone Street S016 8LS Delete Street S016 8LS Delete Authone Street S016 8LS Delete S016 8LS					ay	Sumame		•••••	onfirm Password
-SELECT									hange Password
0008010 - Ms S Hay 950a219d-4500-44fa-9a59 ☑ 0008010 Dev 8 Street SO16 8LS Delete Auth					nactive				inked Accounts
-SELECT	horise	Auth	Delete	ode					Client Account
	horise	Auth	Delete	8LS	et SO16 8LS	8010 Dev 8 St	d-4500-44fa-9a59	ay 960a	0008010 - Ms S Ha
Save Cano									
	Add								SELECT

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.



Refresh Widgets	Add Widget

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 W eb User** screen if they have already validated their email.

Email	karen-ann.mcswiggan@cplsoftware.com		
	Email Verified 🔽		
Sumame	Hay]	
		Email Verified	Email Verified

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.

	Ve have sent a verification email containing your verification code to the email address you entered. Please make sure to check your inbox and ju Iders.
Ρ	lease enter your verification code
	Verification Code
	SUBMIT VERIFICATION CODE
	Resend Verification Email

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 <u>https://contact.cplsoftware.com/portal/home</u>

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 <u>support@cplsoftware.com</u> or through our portal at <u>https://contact.cplsoftware.com/portal/home</u> or calling us on 0345 646 0240 (option 1).

Copyright © 2020 CPL Software Ltd

All rights reserved. No part of this publication may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written permission of the publisher, except in the case of brief quotations embodied in critical reviews and certain other non-commercial uses permitted by copyright law.