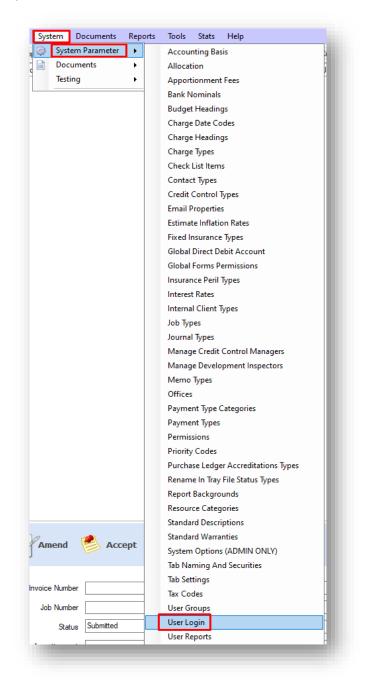




CREATING A NEW CPL USER ACCOUNT

This Helpsheet will take you through the process of creating a new user account in CPL. You will need to contact our Support Team if you need help with a client install of CPL on a new machine.

To create a new user from scratch, click on **System**, **System Parameter** and then choose **User Login** from the resulting drop-down menu.



This will take you to the **User Logins** screen where you can click on the **Add New** button in the action bar on the left of the screen.



-				
e -				
em Parameters	Details 🗌 🤅	Show Deleted User	3	
	User Name	Display Name	Inspector Code	Change Password
	BruceMcLean	Bruce McLean	AB	False
Add New	ChrisM	Chris Macvie	CMCV	True
mm	Leslie	Leslie	LMS	False
	Subuser	Subuser	987	False
	LisaPiper	Lisa	LP	False
Amend	ZacReed	Zac Reed	ZR	False

The Add User screen will appear.

Save and Close	: All Close	
lser Logins		
User Name	Add Profile Picture	
Password	Fire Manager	
Display Name	Property Manager	
Inspector Code	Password Change	
Email ID	BCC Email ID	
MTP User Name	User will need to restart RPM Supervisors	
SMTP Password	for changes to take effect Can Only See Developments I Manage	
DDI Number	Default Payment Type Cash ~	
Signature Path	Office -SELECT V	
Job Title	Extension No	
Tray Directory		
R Printer Name	Don't Print QR Codes	
	Available Groups * Selected Groups	
	Accounts Department Admini Department Administrative Group Budget Administrators Budget Administrators Client Global client global actions	
Initial Main Tab	Client Portfolios	
Initial Sub Tab	Copy -SELECT V	
= Required	Disable Toaster Popups Disable Welcome Dashboard	

The information below will help you to set the relevant details for the new user.

- The **User Name** is what they will use to sign into CPL.
- Type an initial **Password** into the appropriate field.



- You can give the new user their username and password when you are ready for them to log into CPL.
- If you want the user to be able to be listed as a Property Manager then you will need to tick this option to be able to set them as the property manager for developments in your portfolio.
- You can click to upload a profile picture if you are using the Client Web Portal in CPL and would like an image to appear for a property manager there. Otherwise, feel free to leave this blank as it won't be necessary.
- If their role is a property manager and you only wish them to be presented with developments they manage on this screen then there is a tick box option for this.
- The **Supervisors** field on the right is optional and only affects how management information can be accessed in CPL.
- If you wish to set them up as being able to send from their own email address (as opposed to the default email address set for your database) then you can add this, along with the SMTP username and password. Otherwise, set the email ID as the central email used in CPL.
- Unless you wish to use a signature image in correspondence sent from CPL, you can leave the **Signature Path** field empty.
- The **In Tray Directory** field can be left blank if In-Tray isn't being used in CPL. Otherwise, set this as their name.
- The **OR Printer Name** field can also be left blank if this option isn't being used in CPL.
- The **Default Payment Type** will control which type is auto-selected when first entering the client payment daily posting screen.
- The **Security** section, with the tables towards the bottom of the screen allows you to select from the permission groups already set up within your CPL database.

ecurity	Accounts	>	Client Reports	~
	Estates		Customised Reports	
	New_Repairs	<	Development Reports	
	Property Managers		Estimates Tab Access	
	Super Secret User Group	>>	Factoring Services	
	Test1 Details		Finance	
		<<	Hold File Access	¥

- You can use the arrows to allocate from the **Available Groups** to the **Selected Groups**. Your users will not have access to the main reports in CPL unless you make sure that all groups ending in **Reports** are moved over to the **Selected Groups** section.
 - These groups are:
 - Client Reports
 - Customised Reports
 - Development Reports
 - Hold File Reports
 - Insurance Reports
 - Jobs Reports
 - Nominal Reports
 - PL Reports
- The **Initial Main Tab** and the **Initial Sub Tab** fields allow you to select what should be the initial tab on the left when the user logs into CPL. For example, **Developments** and then which will be the first tab on the left when they open an individual Development.



itial Main Tab	Development	\sim
nitial Sub Tab	Master	\sim

There are some notes on the screenshot below to provide additional information and illustration which may be helpful.

Save and Close	emember to S				– 🗆 X
Save and Close	🐝 <u>C</u> lose	Set an initial passv	vord and		Only relevant for the
	-	then tick to allow t		ange	client portal
User Logins	/	on the login screer). 		Add Profile Picture
User Name Ka	arenAnn	<u>_</u>			
Password ****		Fire Manager		_	
Display Name Ka	aren Ann	Property Manager	Deleted		heir email address
Inspector Code KA	A	Password Change			rom their own.
Email ID kar	aren-ann.mcswigg	an@cplsoftware.com	BCC Email		vsie it will pick up the default.
SMTP User Name		* User will need to restart		ervisors Admi	inistrator, Brian
SMTP Password		for changes to take effec		Only See Deve	lopments I Manage
DDI Number 03	345 646 0240			Payment Type	Cash 🗸
		n.McGwiggan\Documents'	Derault	Office	-SELECT-
Signature Path C:\	:\Users\NarenAn	Only relevant	t if		
		you want it p		Extension No	256 Use the arrows to move the
In Tray Directory Ka	arenAnn	in a Mail Me			appropriate permission groups
QR Printer Name O) nly relevant	for In-Tray	🗹 Don't Pri	int QR Codes	to the selected box.
Ava	vailable Groups *		Select	ed Groups	
	ccounts states			unts Departmen n Department	t 🔨
Ne	ew_Repairs		< Admir	nistrative Group	
Tabs for Su	roperty Managers uper Secret User			et Administrator: et Administrator:	
	est1 Details			Global gobal actions	*
when they log in				Settings	Superuser will give all
Initial Main Tab	evelopment	~		Сору	Permisions. Remember to
Initial Sub Tab Ma	laster	~		SELECT	give access to Report
* = Required	Disable Toaster	Ropupa Disable We	Icome Dashbo	and	Groups
	j Disable Toaster	Popups Disable We	come Dashbo	aid	

Once you have added all appropriate information to this screen then remember to click on **Save and Close** before exiting the screen.



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Your user will now be created and they will be able to log into CPL with the credentials you have given them

You will need to ensure that they are using a computer with the client version of CPL installed.

CPL KNOWLEDGE BASE

There are other more general guides available which form part of CPL's Knowledge Base. These are 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 support@cplsoftware.com or through our Support Portal at https://contact.cplsoftware.com/portal/home or calling us on 0345 646 0240 (option 1).

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