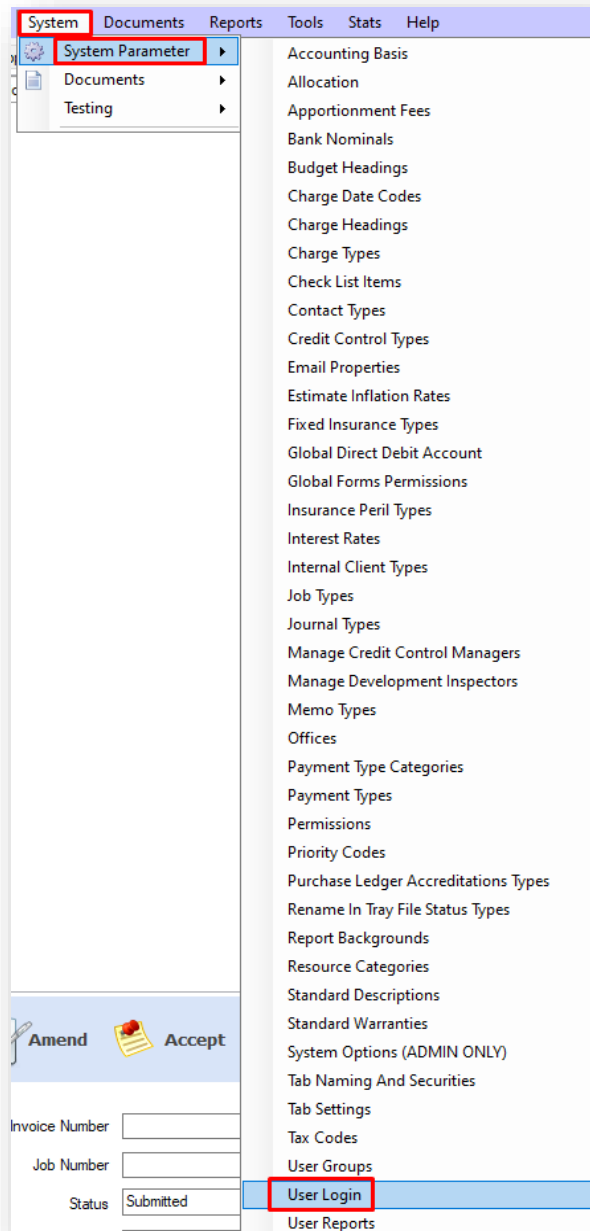# CREATING A NEW CPL USER ACCOUNT

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.

The **Add User** screen will appear.

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 **QR 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.
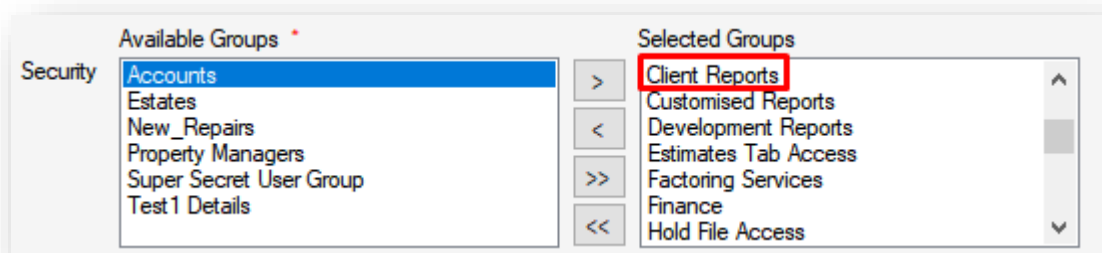
- You can use the arrows to allocate from the **Available Groups** to the **Selected Groups**. Your users will not have access to the main reports in CPL unless you make sure that all groups ending in **Reports** are moved over to the **Selected Groups** section.
  - These groups are:
    - Client Reports
    - 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.

Initial Main Tab Development

Initial Sub Tab Master

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

Amend User — Remember to Save

Save and Close | **Close**

User Logins

Set an initial password and then tick to allow them to change on the login screen.

Only relevant for the client portal

Add Profile Picture

User Name KarenAnn

Password **********

☑ Fire Manager

Display Name Karen Ann

☑ Property Manager   ☐ Deleted

Inspector Code KA

☐ Password Change

Enter their email address if you want them to be able to send from their own.

Email ID karen-ann.mcswiggan@cplsoftware.com

BCC Email ID   Otherwsie it will pick up the default.

SMTP User Name

* User will need to restart RPM for changes to take effect

Supervisors Administrator, Brian

SMTP Password

☑ Can Only See Developments I Manage

DDI Number 0345 646 0240

Default Payment Type Cash

Signature Path C:\Users\KarenAnn.McSwiggan\Documents

Office --SELECT--

Job Title

Only relevant if you want it picked up in a Mail Merge field.

Extension No 256___

In Tray Directory KarenAnn

Use the arrows to move the appropriate permission groups to the selected box.

QR Printer Name Only relevant for In-Tray

☑ Don't Print QR Codes

Security

Available Groups *

Accounts
Estates
New_Repairs
Property Managers
Super Secret User Group
Test1 Details

Selected Groups

Accounts Department
Admin Department
Administrative Group
Budget Administrators
Budget Administrators
Client Global
client gobal actions

Tabs for the user when they log in

Initial Main Tab Development

Initial Sub Tab Master

Tab Settings

☐ Copy

--SELECT--

Superuser will give all Permissions. Remember to give access to Report Groups

* = Required   ☐ Disable Toaster Popups   ☐ Disable Welcome Dashboard

Once you have added all appropriate information to this screen then remember to click on **Save and Close** before exiting the screen.
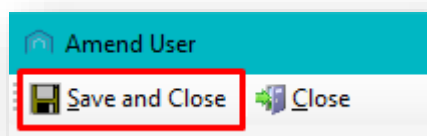
Your user will now be created and they will be able to log into CPL with the credentials you have given them

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 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 Support Portal at https://contact.cplsoftware.com/portal/home or calling us on 0345 646 0240 (option 1).