

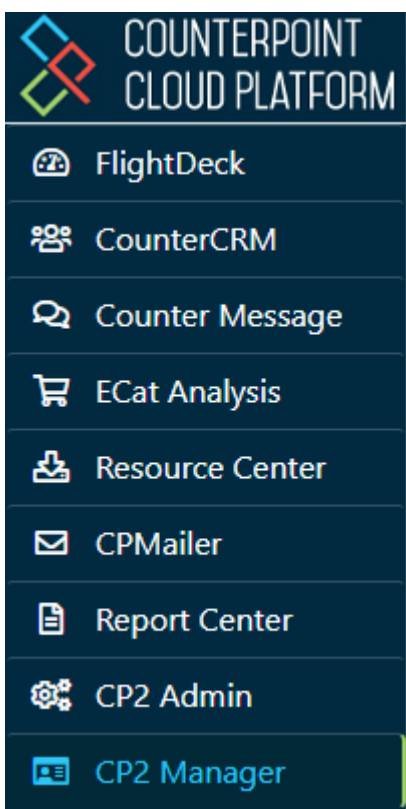
# Adding and Maintaining Users

## Registering a new user

### Sending invite email

Registering a new user is done via an invite based method which can be initiated by any Counterpoint Cloud Platform admin user within your company.


Sending the invite can be done by going to the **CP2 Manager** tab in the left-bar navigation pane



From the **CP2Manager** menu, click the **Add User** button at the top

# Add User

This will present you with a basic user information form:




User Invite

An email will be sent to the address provided for a user to register with. Once the user clicks the email and completes their registration, they will be able to log in and access the Counterpoint Cloud Platform with the permissions you provide.

Employee Name:

Email Address:

Salesrep Id:

Manager? 

☐

Information on this form is gathered in order to set up just the most basic user information and send out an invite for the user to configure their username and password

**Employee Name:** The Employee's name as it will appear on reports, etc.

**Email Address:** The email address which to send the registration invite to.

**Salesrep Id:** The sales rep ID that this person uses. This should match the sales rep id that is assigned to a customer.

When this is filled in, the user will only see customer listings and sales figures for their assigned customers

**Manager:** Marking a user as a manager allows them to see sales data for customers of other sales reps

**Branch:** You will also be given a listing of valid branches. You should assign the user's primary branch here.

## Receiving the invite email

The user should then receive an invite email from the **notifications@counterpoint.cloud** email. This email will contain a link within it that, when clicked on, will direct the user to their own registration page.

If the user does not see a registration email in their inbox, have them check their SPAM filter

## Completing the user registration

When the user clicks on their email, they will be directed to a sign-up form



## Create Account

Username:



Password:



Confirm Password:



Register

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Cloud Platform.

The user will enter in their desired username and a valid password.

Counterpoint Cloud Platform does require complex passwords and will notify you if the chosen password does not meet the minimum requirements of the service.

Upon successful completion of the user setup, your user will be presented a link to log in.

## Managing users

Once a user is set up in the platform, you can manage the user by going to the **CP2 Manager** tab in the left-bar navigation pane. Once in the **CP2 Manager** pane, you can select to edit the user you wish to manage. The user management screen has 4 possible panes to manage different of the user

## User Profile

The screenshot displays the 'User Management' interface with four tabs: 'Profile' (active), 'Settings', 'Permissions', and 'Special Actions'. The 'Profile' tab is titled 'User Settings' and shows the user is 'Logged in as:'. It contains three main sections: 'Change Password', 'Change Email', and 'Change Name'. The 'Change Password' section has fields for 'Current Password' (with a note 'Not Needed For Admin User'), 'New Password', and 'Confirm New Password'. The 'Change Email' section has fields for 'Current Email' and 'New Email', with a note '← Requires entering your current password in the "Current Password" field'. The 'Change Name' section has fields for 'Current Name' and 'New Name'. A 'Submit All Changes' button is at the bottom left.

The **Profile** tab allows you to change the following

- **Password:** A user's password can be modified here.

As an admin user, you are not required to enter in a user's current password in order to make this change

- **Name:** Change a user's name as it appears on reports, etc.
- **Email:** Change the email associated with a user's account

## User Settings

The user settings tab manages server settings and default values used by the system. These changes should not be made without first reviewing the possible options with AMS to avoid causing problems with the user's account.

User Management

Profile

Settings

Permissions

Special Actions

**Warning:** Your Counterpoint Cloud Platform profile heavily relies on some of the settings on this page. Before you change a value, take the time to read through the documentation and make sure you completely understand the value you are changing. It is possible to render your Cloud Platform profile inoperable. If you do render your Cloud Platform profile inoperable, there may be additional billing charges associated with restoring your access. Also note that it is possible to input an invalid value here, and break sections of your Counterpoint Cloud Platform installation. If you have any doubts, contact AMS before making any changes.

Show

10

entries

Search:

	Name	Value
+	flightdeckDefaultBranch	
+	flightdeckDefaultTime	mtdm
+	sidebarMode	full

Showing 1 to 3 of 3 entries

Previous

1

Next

The user settings tab allows you to manage 3 server values

- **flightdeckDefaultBranch:** The default branches displayed when you load the FlightDeck Dashboard. This should be a list of branch IDs separated by commas. ( "01,02,04,12" ) or left empty to display all branches.
- **flightdeckDefaultTime:** The default time displayed when you load the FlightDeck Dashboard. Possible values: "mtdm", "ytd", "mtdy", "p30", "p60", "p90"
- **sidebarMode:** The mode to draw the sidebar in. Either full or small.

## User Permissions

A user's access to store branches and the various modules available within the Counterpoint Cloud Platform are all managed within this tab

User Management

Profile

Settings

Permissions

Special Actions

Enabled Branches

☒ 01 - Chilliwack
 ☒ 04 - Vedder
 ☒ 07 - Abbotsford

User Type

Manager

Page Permissions

FlightDeck

☐ FlightDeck Dashboard
 ☐ Inventory Dashboard
 ☐ Sales Goals

CounterCRM

☐ Customer Directory
 ☐ Customer Dashboard
 ☐ Notes
 ☐ Delivery History
 ☐ Call Log
 ☐ Invoice History
 ☐ CounterCRM Resources

Counter Message

☐ CounterMessage Core

ECat Analysis

☒ ECat Core

Resource Center

☐ Resource Center Core

CPMailer

☒ CPMailer Core
 ☐ CPMailer Manager

- **Enable Branches:** Here you can activate a user's access to your branch locations

- **User type:** This allows you to elevate or lower a user's global access level
- **Page Permissions:** This allows you to grant access or revoke access to specific pages within the Counterpoint Cloud Platform

Based on a user's global access level, some pages are deemed 'required' and will not be able to be revoked.

## Special Actions

This tab allows for special actions to be taken on an account by an admin user

User Management	
Profile	Settings
<div>User Manager</div> <div>Currently managed by:</div> <div>New Manager:</div> <div>Manager's Name</div> <div>Transfer User</div> <div>Archive User</div> <div>Archive User</div>	<div>Imitate User</div> <div>Login as user</div>

- **User Manager:** This assigns another user as the manager of the user selected. This will allow you to assign a 'Manager' level user control of a 'User' level user
- **Archive User:** This will essentially disable a user. It does not delete the user, as this may break certain functionality, but it renders a user inoperable and unable to log in.
- **Imitate User:** Allows you to log in as the user and see their view of the Cloud Platform

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