CFP Software Ltd

CFPwinMan^{sdb}

Version 4.7.1.3

Any changes since the initial release of version 4.7 will be available at the foot of this document.



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Introduction

CFPwinMan Version 4.7.1.3 onwards now offers:

- Anonymisation for contact records.
- Consent management.
- Personal Information Request fulfilment.
- Security improvements.



Improvements in CFPwinMan version 4.7.1.3



Anonymisation

CFPwinMan users can now anonymise information records, both individually and in bulk.

This applies to Landlords, Applicants/Tenants, Contractors and Guarantors.

- By default records cannot be anonymised if any accounts exist within the past 7 years. This can be overridden by users with access to **User Defaults**.
- Users are not given permission to anonymise at upgrade. To grant any user access to the functionality you will need to provide it in **Passwords**.
- Landlords and Contractors need to be archived before they can be anonymised. Applicants/Tenants can be archived or expired. Simply change their **Status**. Guarantors use the Applicant/Tenant status.

🐠 CFPwinMan sdb (4	4.7.1.2) - VPC-	NW-SQL2	014 Data002					
<u>File</u> Information	<u>R</u> eporting	<u>P</u> ostings	<u>M</u> iscellaneous	<u>D</u> efaults	<u>W</u> indow	Help Branch S	ettings	
😢 觉 🖵	so 'i		ii 🕄 🛨			🕙 🥵 🖄	3 🔟	
When the criteria	are met, the	e Anonyn	iise record butt	on on the	toolbar bec	comes active.		
		<⊉ An	onymise Custom	er Data				×
When clicked you are prompted to confirm. This proc string. Th				Wa	arning			
			rocess will replace t The information rela ie information will be	he identifiable ating to this re permanently	e information re ecord will be re v deleted.	elating to this record stained for a period (I with a redaction of 7 days, at whic	¦ :h
		Are yo	u sure you wish to a	continue this	process?	Yes	No	
After anonymisati you have 7 days to	on you are r o undo the c	reminded operation.	Re 	cord Anony andlord: L1(ou have 7 d	ymised 003 has been ays to undo t	anonymised. this operation.	:	

An **Event** is recorded on the **History log** which shows the time and user that performed the anonymisation.



- 1	The	record	is the	en reda	acted.
-----	-----	--------	--------	---------	--------

Landlord L1001 6 days			
Landlord Information Code L1001 Stat Name XXXX Hor Salutation XXXX F Address XXXX Mob XXXX Primary Err Primary Err XXXXX Added 09/08/2005 Y Full Name XXXXX Dept COMMERCIAL DEPA Y	tus ARCHIVED	Service C Property Service Yard Sub-Statio Tenancy EDF Energy Ltd Postings Invoice Payment Cash A/c. Credit Notes	Charge n ▼ IY10E ▼ Receipt NRL A/C Non Cash
This Record has been Anonymis and the information available to vi has been restricted.	sed iew	Payment Warning Note	

Users with access to **GDPR Anonymisation Facility** – **Restore** can restore the record within 7 days of anonymisation via the toolbar button. Hovering the mouse over the button will display a tooltip with the amount of days left until Clean up.

7 days after anonymisation the clean up routine runs and recovery information is removed from your database.

After the **7 day** period it is not possible to restore the record. CFPwinMan support team will be unable to assist in requests to do so as the **data has been deleted** at this time.

For this reason it is highly recommended that you carefully consider to whom you provide this function.



Bulk Anonymise

Records can also be bulk anonymised via a form accessible from **Miscellaneous** -> **Anonymisation** -> **Anonymise Information**.

DPR : Anonymise Records × **Record types** Tenants/Applicants Landlords Contractors Guarantors are listed on individual tabs. 🗹 🍸 T1001:Mr Ha 🔽 🍸 T1007:Mr Rodney Charlton:nickcfp3+aag@gmail.com Your selection 🗹 🍸 T1036:Mr Troy McClure:nickcfp3+abi@gmail.com 🗹 👢 L1009:Mr C M Burns:nickcfp2+aai@gmail.com will remain as 🗹 🏐 G1004:Hall Guarantor:nickcfp4+aab@gmail.com different tabs 🔲 🤤 C1002:Payments Department:nickcfp4+aab@gmail.com are chosen. To anonymise selected records click Next -> Next Anonymise.

As with individual anonymisation you are then asked for confirmation to proceed. When you select **Yes** to the prompt all selected records will be anonymised.



Depending on how many records you have chosen the bulk anonymisation process can take some time.



Bulk Recover

Records can be bulk restored from anonymisation via **Miscellaneous** -> **Anonymisation** -> **Recover Anonymised Information**.

Records that have been anonymised within the last 7 days are displayed.	GDPR: Recover Anonymisation Infomation Recoverable G C1002: Powergen: nickcfp4+aab@gmail.com L1005: nickcfp2+aae@gmail.com L1005: nickcfp2+aae@gmail.com T1038: nickcfp3+abi@gmail.com Recover Cancel	
To recover your rec	cords simply select them in the list and click Recover .	

This operation can take some time, especially if you have many records selected.

You can override the default of 7 years that disallows anonymisation. Go to **Defaults** -> **User Defaults** -> **Anonymisation**.

nonymisation Settings	×
Anonymisation Defaults	
Allow information to be anonymised 7 🕂 year	s after latest transaction
WADNINC: Deducing this setting holes: 7 a	and will allow you
WARNING: Reducing this setting below 7 y to delete records where there may be a	ears will allow you legal or other
WARNING: Reducing this setting below 7 y to delete records where there may be a requirement to keep information fo	ears will allow you legal or other r longer.
WARNING: Reducing this setting below 7 y to delete records where there may be a requirement to keep information fo	ears will allow you legal or other r longer.

The option can be set between zero and seven years. Please be aware there may be implications of changing this setting as noted on the dialog.



Relocate Redundant Files

The cleanup routine runs at logon and removes information that has been anonymised at least 7 days before. Any user that has been assigned the **Security setting**: **GDPR Anonymisation Facility - Relocate Files** is advised to run the **Relocate Redundant Files** routine available from **Miscellaneous -> Anonymisation**, and how many records will be affected.

DPR - Records ready for cleanup	× This can be done at any time, the notific
There are 6 anonymised records which are no longer recoverable. To ensure compliance with GDPR, please now remove any associated redundant files via 'Miscellaneous / Anonymisation / Relocate Redundant Files'	will continue to be displayed until it is.

When **OK** is selected physical files (e.g. Invoices, Receipts, Statements and linked documents) relating to anonymised records will be moved from the main CFPwinMan datapath to a folder named **Relocated Files**.

Relocate Redundant Files		×
Files related to Anonymised Records wi and deletion. This process may take some time to com Do you wish to continue?	II be relocated to ease review plete.	•
	OK Cancel	1

This can (and will) take some time in many circumstances, depending on how many records have been anonymised and what documents pertain. You are notified of ongoing progress.

🐠 Clean Up Files Progress	×
Current item	100%
Overall	11%
SC C1002 9 Cheque 20070727.PDF	

Once files have been moved they can then be easily deleted at your discretion.



Consent Preferences

Users of CFPwinMan now have the ability to update consent preferences for all contacts. Additionally, contacts also have the ability to update their own preferences.

On contact records, i.e. Landlords, Applicants/Tenants, Contractors and Guarantors, you will notice a **Preference Centre** tab:

Requirements Reference	es Receipts/Dem	ands	Pref	erence Centre Letter	rs SMS/Email
Mobile Phone Format ○ SMS ⓒ MMS	Delivery Type Email	⊟ ѕм	s	Postbox	
Consent Preferences	Changed			Updated By	
General Marketing	17-Apr-2018	1.	7	DAN	
Property Matching	17-Apr-2018		7	DAN	
Hallmark		ú	7	(Default)	
Home Telecom		ú	7	(Tenancy)	
Movelt			7	(Tenancy)	
		1			

Users can click the thumb icons to set contacts preferences. Who did so and on what date is logged. At the point of upgrade to 4.7.1.3 existing records will have **General Marketing** and **Property Matching** set to unknown, new records will be set to no consent.



The **General Marketing** preference of each contact is displayed on the main toolbar.





When emailing multiple recipients you will receive an updated **Messaging** dialog which displays the **General Marketing** preferences of your contacts. This occurs when, for example, you select multiple records on the organiser, right click and select **Email Landlord / Tenancy / Tenant / Contractor**.

You will not be warned further upon clicking **Confirm**, so it is up to you untick contacts with no record of consent to receive communications.

È	2		SIVIS/E-mail I	viessaging
		B	ecipients	
	Code	Contact Name	То	C
~	L1010	Springfield Heights Directors	nickcfp2+aaj@gmail.com	-
~	L1011	Fawlty Towers Directors	nickcfp2+aak@gmail.com	7
~	L1012	Mr B & Mrs S Fawlty	nickcfp2+aal@gmail.com	()
es	sage stor	ed for E-mail transmission	Send Now	Confirm
				Cancel

Reporting -> General -> Information will also provide options to include contact records with Consent Unknown and Not Consented:

Report Generator	4.7.12 ? X
100	Reference Search from <any> to <any></any></any>
100	Address Search
1000	<any></any>
	Name Search
D D	<any></any>
C	Consent Options Include Landlords with a General Marketing Consent Status of:
В	Consented Consent Unknown Not Consented
A	<u>↑</u>



When using **CFPwinMan Matching and Mailing** users will notice a new **Include Unknown Consent** option on both the **Global Filter Criteria** and **Applicant/Property** tabs:

Global Filter Crit	eria 🔒	i kilowicuje cellu e	
CFPwinMan Mate Global Filter Crite	Actions Include Previously Mailed Bedrooms Area: Unknown Offices Planning: Unknown 2016 Area (sq m) Parking Spaces Furn/facilities: Unknown	Type: Unknown Lease Terms: Uni Location: Unknown Garder/grounds: Smoking: Unknown Parking: Unknown	known Unknown n
Apply Price Minimum: 0 Price Maximum: 999999 Required By: 17 Apr 2 But Not Before: 17 Apr 2 Filter Negotator Filter Vegotator Filter Category	iend Email SMS Post Name	Status V COMMERCIAL LESSEE LESSEE LESSEE Unknown Consent V Details His Name: Mr A Read Address: 1 Readers Way Reading Berks Telephone: Mobile: Email: rickcfp3+aaz@ Notes	itory
Deselect All	Incl Address V V I 12 Smith Street, Chelsea V 28 Orchard Drive, Blackheath V 127 Jones Street, Mayfair	Price Avai ▼ £825 NC £560 NC £700 NC	Photos
	0 0 0	Postcode: SW3 4EN	Streetview
Fitter Negolator	C Email C SMS View / Print C	Property Default	Export

The option controls whether or not Applicants who have not provided Property Matching consent will be included in the mailing list. Records which are displayed using this option are listed in grey.

		🕂 User Defaults				
Going to: Defaults -> User De Include Unknown Consent wi default when Matching and M	faults -> Matching -> Il set the option on by Iailing is opened.	Standard Paths + WP Options Matching Fees / Deductions Organiser Setup Brochures Photolists Diary Service Charges Text Criteria Numeric Criteria Image: Content of the				
An Event is recorded in the Hi	story Log when ticked.	Letter to be printed after match on Price Tolerance Property Applicant Applicant Categories 300 Days Include Unknown Consent				
History Log History Log Elterng/Reports Add Entry Criteria Type C All C Landord C Property C Tenancy C Tenant C G DATE Time EVENT ▶ 177/04/2018 11:43:05 Unknown/concent	uarantor © Contractor © Management Co © Bank Account all records COMP (NOTES Letters LCODE Ø [Sloba] Tinclude Unknown Consent	Close				



Email footers to contacts will now contain a unique	e URL labelled Manage My Contact Preferences.

-	
When clicked up	oon it will take the recipient to their Contact preferences web page.
CFP [Demo Agent
Manage v	our communication preferences
To find out more ab	out how we use your information please refer to the privacy policy on our website.
Contact prefe	rences
Would you like contact method this page.	to receive news, offers and updates via your preferred If from Nick QA 20? You can unsubscribe at any time from
Would you like interest to you, You can unsub	Nick QA 20 to send you details of properties that may be of based on your specific criteria, as they become available? scribe at any time from this page.
Save preference	ces
© 2018 - CFP	Demo Agent
	Manage your communication preferences

These preferences are imported into CFPwinMan at the first log in every day.

When updated via this method, your **Preference Centre** tab will display **Online** in **Updated By**.



Personal Information Request

Users of CFPwinMan now have the ability to easily export data held on any of their clients.

Applicable records (Landlords, Applicants/Tenants, Contractors, Guarantors) display the **Export Held Data** icon on the main toolbar:

DEPWinMan sdb (4.7.1.2) - VPC-NW-SQL2014 Data002									
<u>F</u> ile	Information	<u>R</u> eporting	<u>P</u> ostings	<u>M</u> iscellaneous	<u>D</u> efaults	<u>W</u> indow	<u>H</u> elp	Branch Settin	ngs
	1	so 🛬	NEW	l 🔍 🛨				🥐 🔀	Ì
	-								

	Data Protection : Export Data to Customer		×
When clicked users will be presented with the Export	 Export Options for landlord (L1020: Mr F. MacKay) Customer Data Financial Data Emails 	⊙ Info ⊜ Port	rmation Request ability Request
Select the information you —— wish to export.	 Documents Consent for 3rd Party Relationships History Log Entries Diary Events 		
Select a folder to export the files to.			
Select Export .	v:\winManSQL2\data\SQL\	Export	 Cancel

A separate file for each option ticked is created and placed into a passworded Zip file in the location specified.	CFPwinMan sdb × A zip containing the exported data has been produced and encrypted using the password
A dialog shows the password, which is also copied to the clipboard for easy use.	L1012landlord20180511-7084 This password has been copied to the clipboard.
You may choose to open the export location now by clicking Yes .	Open the folder now? Yes No



To create a file with the necessary information to create a record in other software, choose – **Portability Request**.

Protection : Export Data to Customer	X
Export Options for landlord (LT020; Mr F. MacKay)	 ○ Information Request ● Portability Request
v:\winManSQL2\data\SQL\	Export Cancel

You are not given the option to export other information.

This creates a CSV file correctly formatted for importing into other contact management solutions.

export_landlord_L1001.CustomerData.bt - Notepad	-		×
File Edit Format View Help			
xported Customer Data for landlord L1001			^
Accountant Information			
Landlord's Accountant Address line 1","Landlord's Accountant Address line 2","Landlord's Accountant Address line 3","Landlord's Accountant Addr ","Landlord's Accountant E-mail Address","Landlord's Accountant Name","Landlord's Accountant Postcode","Landlord's Accountant Fax Number","Land Iome Telephone Number","Landlord's Accountant Mobile Telephone Number","Landlord's Accountant Work Telephone Number" 23 High Street","Colchester","Essex","","accountant@accounting.net","Mr A Check","CO1 3EX","01206 3478343","01206 123456","07777 765432","01206	ess line lord's Ac 3478342"	counta	nt
ank Account Information			
accname","accno","Address1","Address2","Address3","Address4","BankName","bdc","ClientCode","Contact","PostCode","reference","sortcode","Tel" Mall Limited","35686278","Addy Line 1","Line 2","Trois","Quatre","HSBC Bank PLC","4353","L1001","Dave@Thebank","TR15 1SS","CFP Commercial","46-	78-85",""		
Basic Information			
Company Name","Landlord's Address line 1","Landlord's Address line 2","Landlord's Address line 3","Landlord's Address line 4","Landlord Code", Iddress","Landlord's Full Name - as used in contracts","Landlord's Name","Landlord's Postcode","Landlord's Salutation","Landlord's Fax Number"," 'elephone Number","Landlord's Mobile Telephone Number","Landlord's Work Telephone Number","Landlord's VAT Number","Landlord's Name',"Landlord's Name',"Landlord's VAT Number","Landlord's VAT Number","Landlord's VAT Number","Landlord's VAT Number","Landlord's VAT Number","Landlord's "Inte Mall Shopping Centre Ltd","23-75 Coval Avenue","Chelmsford","Essex","","L1001","nickcfp2+aaa@gmail.com","The Mall Shopping Centre Limited", "Mith'", "CMI 171", "Mr. Smith", "20126, 3435845", "01209, 313131","07277, 435844", "01245, 435844",","",",",",",",",",",",",",",",",",	Landlord' Landlord' ord's VAT "`Mr J	s E-Ma s Home Numbe	il r"

Contact the vendor of the software you are attempting to import the data into should you require further assistance in doing so.



Security updates

Multiple changes have been made to CFPwinMan to enable significantly increased security and data protection. It is highly recommended both new and experienced users of the product familiarise themselves with these changes to facilitate the continued smooth running of their office.

Users change their own passwords

Users can now change their passwords without requiring access to the **User Management** functionality in **User Defaults**. This also means a user can set their password to one no other user knows, as they are now redacted in the aforementioned screens.

Go to: Defaults -> Change Password.

<u>F</u> ile	Information	<u>R</u> eporting	<u>P</u> ostings	<u>M</u> iscellaneous	<u>D</u> efa	aults	<u>W</u> indow	<u>H</u> elp	Branch	Settings	
						User [)efaults				
		SD 🚽			~	Receiv	/e <u>A</u> larms				
Inforr	nation					Edit N	ly <u>G</u> oogle	Preferen	ces]	
8	Landlords				•	Chan	ge <u>P</u> asswo	rd			
Â	Properties			(P) Change Pa	ISSWO	rd				×	
	Tenancies			that enanger a	U	pdate	pass w ord	for AM	r		
4	Applicants				Old F New F	asswor) asswor]	
	Contractors			Confirm	New F	asswor	ا د				
	Bank Accounts							OK	C	ancel	
8	Custodial Deposit										

The **Change Password** dialog appears. Users need to know their **Old Password** to change it. If a user has forgotten their password they can be assigned a temporary one from a system administrator.



User Management

Boles									
Name		Active	Select	▲ Name	Initials	Colour	Bole	Position	Email
Admin						00.00		1.0000011	
Full Access				Aarran Ellis	ΔF		Full Access		
Non Accounts Staff			Ē	Amy Smith	AMY	Light green		Sales Manag	
Sales				Bill Rayet	BR	Bright white	Full Access		
				Clare Parker	CP	Green	Full Access		
				Dan Roach	DAN	Light red		Software Tra	dan.roach@cfp-si
			_ <u>H</u> _	Dave David Countries	DVE		5		
			_ <u>H</u> _	Graham Smith	20	Lightred	Full Access		
			-H-	Jan Gates		Blue	Full Access		
			- 2	Jonny Davoile	JDV		Full Access		
				Juliet	JBD				
				Kevin Butler	KB		Full Access		
				Mark Adair	MA		Full Access		
				Mark Dickerson	MD		Full Access		
				Mark Freeman	MP		Full Access		
			H	NeilJowett	N.I	Green	Full Access		
		Ū	Ē	Neil Robinson	NB		Full Access		
				Robert Bell FNAEA	RB		Full Access	Field Training	rob.bell@cfp-softv
				Dobort Dobon	lono	Maganta	Evil Access	Color Monor	rah hahan alafa a
_									
New options are av	ailable to	users	with a	iccess to this f	orm:				
New options are av	ailable to	users	with a	iccess to this f	orm:				
New options are av	ailable to	users	with a	iccess to this f	orm:				
New options are av Expire Selet 	ailable to cted Use i	users r s Pass	with a word	iccess to this f	orm:				
New options are av • Expire Selec Tick Select a	ailable to cted Use i against oi	users r s Pass ne or n	with a word nore u	iccess to this f	orm:	ton to imn	nediately ex	opire those	users'
New options are av • Expire Select Tick Select a passwords	ailable to cted Use i against oi They will	users r s Pass ne or n be rec	with a word hore u	iccess to this f	orm: this but	ton to imn	nediately extension	opire those	users'
New options are av • Expire Select Tick Select a passwords.	ailable to cted User against or They will	users r s Pass ne or n be rec	with a word hore u quired	iccess to this for isers then click to set a new p	orm: this but password	ton to imn l at their n	nediately ex ext logon.	opire those	users'
New options are av • Expire Select Tick Select a passwords. • Expire pass	ailable to cted User against or They will words af	users rs Pass ne or n be rec ter X d	with a word nore u quired ays	access to this for users then click to set a new p	orm: this but bassworc	ton to imn l at their n	nediately ex ext logon.	xpire those	users'
New options are av • Expire Select Tick Select a passwords. • Expire pass Tick this an	ailable to cted User against or They will words af d set an a	users rs Pass ne or n be rec ter X d	with a word nore u quired ays t of da	access to this for users then click to set a new p uvs to automat	orm: this but bassworc ically exp	ton to imn l at their n pire everv	nediately ex ext logon. user's passy	xpire those word after	users' the time
New options are av • Expire Select Tick Select a passwords. • Expire pass Tick this and	ailable to cted User against or They will words af d set an a	users rs Pass ne or n be rec ter X d	with a word nore u quired ays t of da	iccess to this for isers then click to set a new p inys to automat	orm: this but bassworc ically exp	ton to imn l at their n pire every	nediately ex ext logon. user's passy	xpire those word after	users' the time
New options are av • Expire Select Tick Select a passwords. • Expire pass Tick this and period spec	ailable to cted User against or They will words af d set an a ified. This	users rs Pass ne or n be rec ter X d imoun s will a	with a word nore u quired ays t of da lso be	access to this for users then click to set a new p ays to automat enforced at th	orm: this but bassword ically exp neir next	ton to imn I at their n Dire every logon afte	nediately ex ext logon. user's passy	xpire those word after sers are adv	users' the time vised on the
New options are av • Expire Select Tick Select a passwords. • Expire pass Tick this and period spec- login screen	ailable to cted User against or They will words af d set an a cified. This n when th	users rs Pass ne or n be rec ter X d moun s will a ney hay	with a word nore u quired ays t of da lso be re 7 da	access to this for sers then click to set a new p ays to automat enforced at the ays or less befor	orm: this but bassword ically exp neir next pre passy	ton to imn I at their n Dire every logon afte vord expir	nediately ex ext logon. user's passy er expiry. Us v.	xpire those word after sers are adv	users' the time vised on the
 New options are av Expire Select a passwords. Expire pass Tick this and period spectologin screer 	ailable to cted User against or They will words af d set an a sified. This n when th	users rs Pass ne or n be rec ter X d imoun s will a ney hav	with a word nore u quired ays t of da lso be re 7 da	access to this for sers then click to set a new p ays to automat enforced at the ays or less befor	orm: this but oassword ically exp neir next ore passv	ton to imn I at their n Dire every logon afte vord expir	nediately ex ext logon. user's passi er expiry. Us y.	<pre>cpire those word after sers are adv</pre>	users' the time vised on the
 New options are av Expire Select a passwords. Expire pass Tick this and period spect login screer Lock passwords 	ailable to cted User against or They will words af d set an a cified. This n when th ords afte	users rs Pass ne or n be rec ter X d imoun s will a ney hav r X att	with a word nore u quired ays t of da lso be re 7 da empts	access to this for sers then click to set a new p ays to automat enforced at the ays or less befor	orm: this but oassword ically exp neir next ore passv	ton to imn I at their n Dire every logon afte vord expir	nediately ex ext logon. user's passy er expiry. Us y.	xpire those word after sers are adv	users' the time vised on the
 New options are av Expire Select a passwords. Expire pass Tick this and period spect login screer Lock passw This is set b 	ailable to cted User against or They will words af d set an a cified. This n when th ords afte y default	users rs Pass ne or n be rec ter X d imoun s will a ney hav r X att and ca	with a word nore u quired ays t of da lso be ve 7 da empts	access to this for sers then click to set a new p hys to automat enforced at the ays or less befor be disabled. Ye	orm: this but oassword ically exp neir next ore passy ou can ch	ton to imn I at their n Dire every logon afte vord expir	nediately ex ext logon. user's passy er expiry. Us y. value from	xpire those word after sers are adv 3 to 10 atte	users' the time vised on the empts. User
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User Management is accessed via **Defaults** -> **User Defaults** -> **Passwords**.

uppercase character, one lowercase, one number and a special character. The tooltip on this button will remind you. When ticking this option you are also asked if you wish to force all users to change password at their

Tick this to enable password complexity requirements. Complex passwords require at least one

When ticking this option you are also asked if you wish to force all users to change password at their next logon. This cannot be undone (even if you subsequently disable complexity).



Double clicking on any user brings up their Ma	aintain Users form.
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	🐠 Maintain U	lsers	×
	Name Role Details Secu	Amy Smith	Active
	Position Email	Sales Manager	
If Expire passwords after X days is selected then you are advised when the —— user's Password expires .	Mobile DDI		
	Initials Password	AMY Password expires on 08/6/2018	
You can expire the user's password immediately by clicking Expire Password .	Signature	Expire Password Chang	e Password
		Save & Exit	Close

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You can change the user's password by clicking Change Password.

If you have selected a user other than yourself clicking **Change Password** will not prompt you for their existing password. Instead the password you create will be temporary. The user will be asked to change their password at their next login - they will need to know their temporary password for this. Passwords created for new users are also temporary.

If complexity is enabled the temporary password will also need to adhere to those rules.

Change Password X
Enter new complex temporary password for DAN
New Password
OK Cancel



Security settings

New security settings are available. You can access these to set and disable them by clicking on the **Security** tab on **Maintain Users**. The options are:

- Contractor Tab Preference Centre
- Demo Database Facility Enabled
- GDPR Anonymisation Facility Anonymise
- GDPR Anonymisation Facility Cleanup
- GDPR Anonymisation Facility Relocate Files
- GDPR Export of Data (PIR)
- Guarantor Tab Preference Centre
- Landlord Tab Preference Centre
- Tenancy Tab Details >Tab Bank Details
- Tenancy Tab Details >Tab Main
- Tenancy Tab Details >Tab Payments
- Tenant/Applicant Tab Preference Centre
- Word Processor Merge

Demo Mode

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	Demo Mode now has a g	global override for each database.	located in Defaults -> User Def	aults -> Standard.
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Default number of months to show for History Log Global History Records History	Demo Mode Enable Demo Mode Retain (days) Delete Demo Databases	
		Close

When this option is disabled Demo Mode is not available for any user, and all existing demo databases are immediately deleted. Any users currently using Demo Mode at this time will receive an error message and need to close the client and log back into CFPwinMan.

Delete Demo Databases will initiate removal of all demo databases from the server machine. Any users currently logged into Demo Mode will be able to continue working and their data will be deleted once they are logged out.

Demo databases are automatically deleted when unused for the period specified under Retain (days).