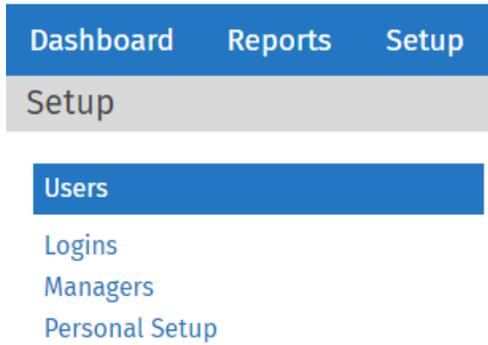


## CCH Entities: Adding a new user

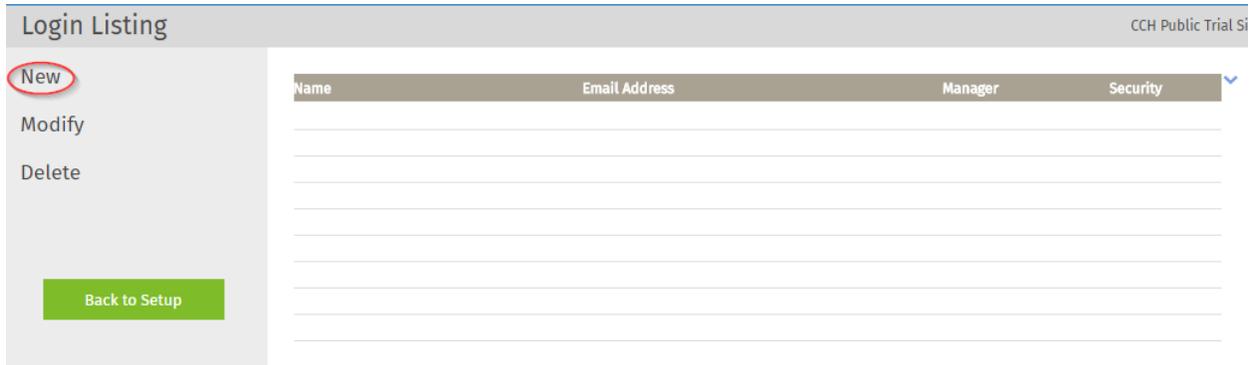
This guide will help you to set up new users. The process is the same for Trusts and Companies. You will need to have administrator rights to add users.

### Basic setup

Go to the **SETUP** screen and select **LOGINS**



Select **NEW**



Complete the details:

- **Login Name.**
- **Email Address.** This must be a current and valid email address to allow password reset emails to be sent.
- **Password.**
- **Task Manager.** Set this to automatically assign all tasks you add to another manager.
- **Use Outlook for Tasks.** Select if you want to use the Outlook interface to add tasks and reminders to Outlook.
- **Days Ahead.** This controls the date range of tasks displayed when you select **ALL TASKS** on the dashboard. Leave at 0 to see all.
- **Security Level.** A User can do everything except access the **SETUP** screens. An Administrator can access the **SETUP** screens to add and remove users and change database settings. An Administrator can also add trusts and companies after the current limit has been reached and agree to any subsequent billing.

Login General Information

General

Login Name	<input type="text"/>	
Email Address	<input type="text"/>	
Password	<input type="password"/>	Your password must have: <input checked="" type="checkbox"/> 8 or more characters <input checked="" type="checkbox"/> Upper & lowercase letters <input checked="" type="checkbox"/> At least one number
Task Manager	<input type="text" value="No Manager Link"/>	
	<input type="checkbox"/> Use Outlook for Tasks?	
Days Ahead	<input type="text" value="0"/>	
Security Level	<input type="text" value="User"/>	

If you only subscribe to Companies only select **SAVE** to complete the process.

## CCH Entities - Trust Subscribers Only

- Select the appropriate **Document Groups**. This controls the documents you can create. For example, if you are an accounting professional, you may choose to turn off access to 'Legal Only' documents for your own protection.

Login General Information

General

**Trust Groups**

Login Name

Email Address

Password  Your password must have:

- ✓ 8 or more characters
- ✓ Upper & lowercase letters
- ✓ At least one number

Task Manager

Use Outlook for Tasks?

Days Ahead

Security Level

**Document Groups**

- Legal Only
- Legal Advice
- Accounting
- Legal & Accounting

- Select the **Trust Groups**. Trust Groups are a reporting and enhanced security feature. Select the groups that this user can have access to. For example, you may have set a 'private' group that not all users can see. **SELECT ALL** if all Trust Groups are available to all users. You can also set users to **View Only** on specific groups if required.

Note: If you do not have any Trust Groups, this screen will be blank. If you do have groups but do not assign those groups to your users, they will not be able to access the trusts in that group.

Login Trust Groups Alison

General

**Trust Groups**

Name	View Only	Select All
<input checked="" type="checkbox"/> Auckland Central	<input type="checkbox"/>	Select All
<input checked="" type="checkbox"/> Auckland North	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Christchurch	<input type="checkbox"/>	
<input checked="" type="checkbox"/> Hamilton	<input type="checkbox"/>	
<input checked="" type="checkbox"/> London	<input type="checkbox"/>	
<input type="checkbox"/> Private	<input type="checkbox"/>	

Select **SAVE** to complete the process.