Setting Up Your Organization Tip Sheet

This tipsheet was created for users of the CALP database.

Use this tipsheet to learn about:

- [Updating your organization's information](#)
- [Adding a new user](#)
- [Updating user information](#)
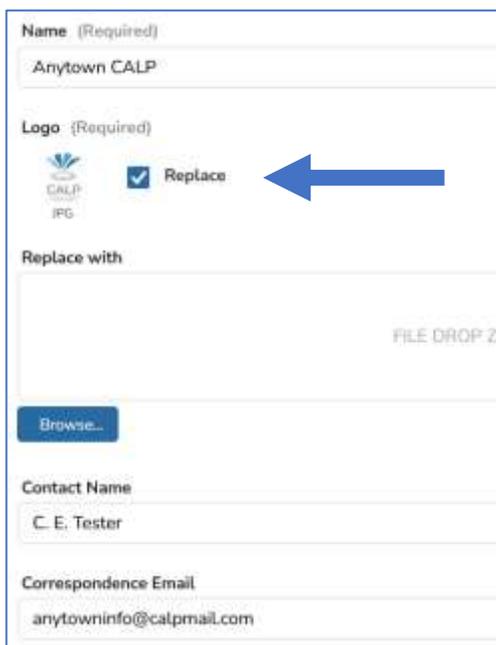- [When an Administrator leaves](#)

Updating your organization's information

All database accounts are set up with a contact name and email address. To complete set up or edit your organization's information, follow these steps:

Click My Organization in the Quick Links panel on the Dashboard

QUICK LINKS
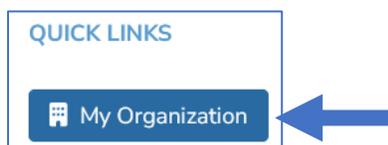
🏢 My Organization

Update or complete the information on the form

Name (Required)

Anytown CALP

Logo (Required)

CALP JPG   ☑ Replace

Accounts are set up using the CALP logo. To add your own logo, click the Replace checkbox.

Replace with

FILE DROP ZONE

Browse...

Click Browse to upload your organization's logo

Contact Name

C. E. Tester

Update your organization's main contact person

Correspondence Email

anytowninfo@calpmail.com

Update correspondence email

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Complete your organization's contact information

Organization Address
4th Avenue

Address Line 2
South of Main Street

City
Three Hills

Province
Alberta

Postal Code
T0M 2A0

Phone Number
403-123-4567

Fax Number

Payment, Cancellation and Refund Policy
Payment is due before classes start.
Full refund if you cancel at least one week before classes start.

Email
info@anytownlearning.ca

Website
https://anytownlearning.ca

Submit   Cancel

Add your payment/cancellation policy. **Note:** this information is displayed on all invoices/receipts.

Add an alternate email if you use one

Add your website address

Click Submit

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Adding a new user

Database users are called Administrators. Only an active database user in *your organization* can add new Administrators to your database. **Note: *ALL*** Administrators in your database account have full access to all features of the account. To add a new Administrator to your database account, follow these steps:

Click Administrators in the Quick Links panel on the Dashboard

QUICK LINKS

🏢 My Organization

👤 Administrators

Click New profile

+ New profile
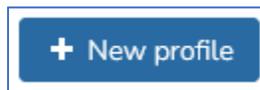
Complete all required information

First Name (Required)

New

Last Name (Required)
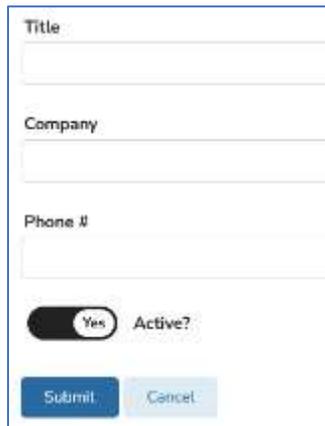
User

Email (Required)

messages@anytowncalp.ca

This email address is used for 2 factor authentication (2FA) during login

Set a temporary password. All users are encouraged to update their password on their first login

Password

Password must be at least 8 charact

••••••••

When you type the password, the Confirm password box opens. Type the identical password to confirm (the green Matches indicator pops up)

Confirm password

⊘ Matches

••••••••

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Enter any additional information

Make sure the Active toggle is turned on (this allows access to your database)
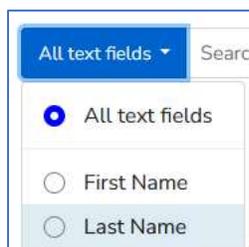
Click Submit

Updating user information

Updating the Administrator profiles in your database is important to stay on top of any changes that are happening in your organization. To edit information for a database Administrator, follow these steps:
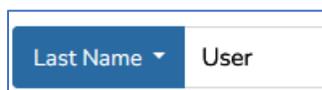
Click Administrators in the Quick Links panel on the Dashboard

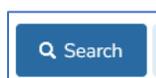Click the All text fields search box and select Last Name

Type the last name of the Administrator you want to edit

Click Search

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Click the 3 dots to the right of the record

First Name	Last Name	Email	Company	Active?	
New	User	messages@anytowncalp.ca		Yes	⋮

Select Edit

Edit

Copy

Delete
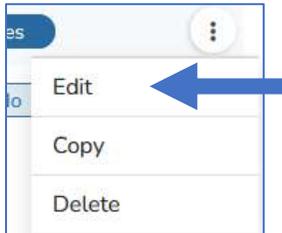
Update any relevant information

First Name (Required)
Newer

Last Name (Required)
User

Email (Required)
messageme@anytowncalp.ca

Password
Leave blank to keep your current password

Title

Company

Phone #

Yes Active?

Submit   Cancel

Leave the password field blank to keep the current password

Make sure the record is still active

Click Submit

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When an Administrator leaves

Change is a normal part of CALP business. When an Administrator leaves the organization, it is important to remove access to your database accounts. To deactivate an Administrator, follow these steps:
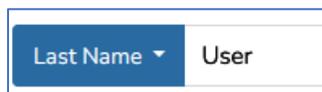
Click Administrators in the Quick Links panel on the Dashboard

Click the All text fields search box and select Last Name
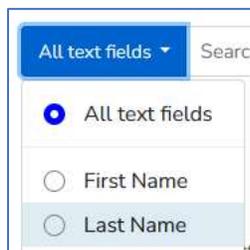
Type the last name of the Administrator you want to deactivate

Click Search

The database will show the record as Active

Click the Yes button to turn it off and deactivate the Administrator record

This administrator can no longer log into your database account

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