



CmRelationManager version 2

Quick Manual

M170006

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Content

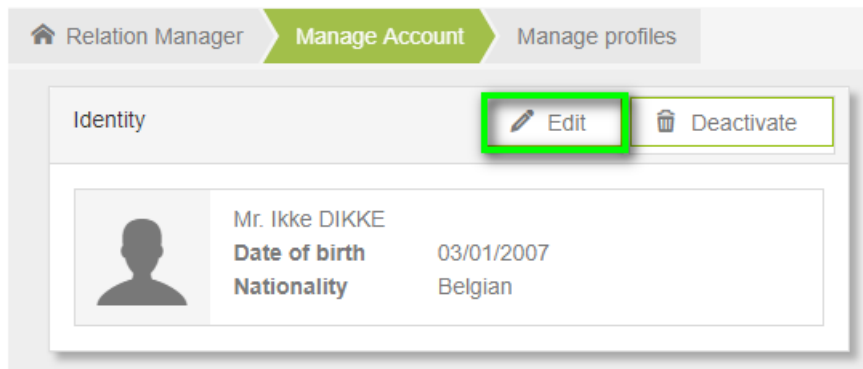
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New functions in Version 2 of the cmRelationManager host application.

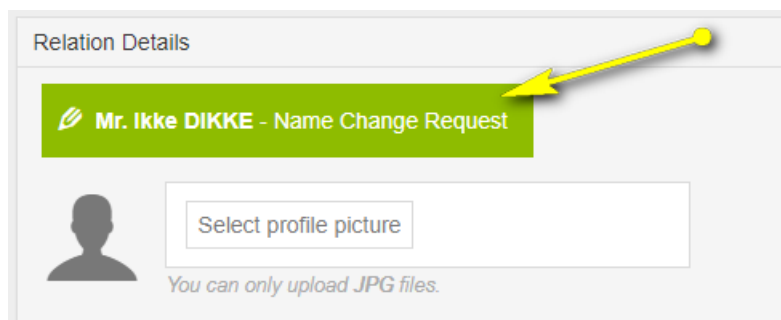
1. Request Name Change

Functional:

You can have your name changed by sending a request to the organisation. The “change name request” functionality is embedded in Manage account within the “Edit Identity” function



If you step inside the “edit” function by clicking on the icon, a popup will appear in which you can manage your relation details. One of the functions is the “Name Change Request”



Click on “name Change Request” and a popup will appear in which you can give in another first name and/or last name.

Relation Details

Update First name

Update Surname

By clicking on send request, an email is sent to the organisation. The organisation will then need to update the name in cmOffice (manually) within a certain period.

cmRelationManager settings:

- You can switch on/off the “name change request” function by tick marking the “Is panel Visible” field in “Manage Account / Manage Identity / Panels”
- The fields “Update first name” and “Update Surname” can be set in “Manage Account / Manage Identity / Items”
- In the mailing templates view “Request name change template” you can define the mail address that will receive the requests for a name change.

2. Deactivate an account


Functional:

Any person who created an account must have the opportunity to have his personal account details removed from a database (new European regulations linked to privacy rules).

This can be done via the “Deactivate” button embedded in the manage account function.

Relation Manager **Manage Account** Manage profiles


Identity

 Mr. Ikke DIKKE
Date of birth 03/01/2007
Nationality Belgian

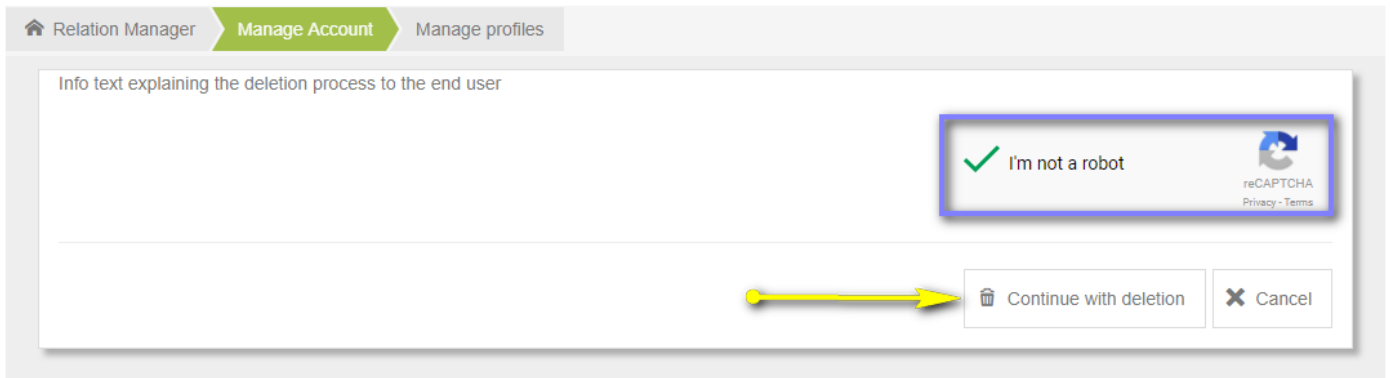
A click on the “Deactivate” icon will bring you in a window in which a verification is done whether a human is operating the website. The verification is initiated by clicking on the “reCAPTCHA” icon.

Relation Manager **Manage Account** Manage profiles

Info text explaining the deletion process to the end user

I'm not a robot 
reCAPTCHA Privacy - Terms

A positive verification will bring in the button to deactivate your account details (“Continue with deletion” button)



Precondition: Google reCAPTCHA key needed.

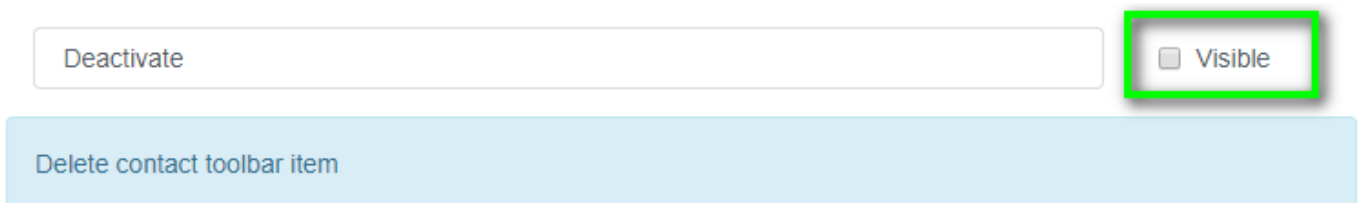
reCAPTCHA protects you against spam and other types of automated abuse. To start using reCAPTCHA, you need to [sign up for an API key pair](#) for your site. The key pair consists of a site key and secret key. The site key is used to invoke reCAPTCHA service on your site or mobile application. The secret key authorizes communication between your application backend and the reCAPTCHA server to [verify the user's response](#). The secret key needs to be kept safe for security purposes.

Login in with your google user account on this [website](#). First, choose the [type of reCAPTCHA](#) and then fill in authorized domains or [package names](#). After you accept our terms of service, you can click **Register** button to get new API key pair. It is the secret key that needs to be added in the web configuration file of the cmRelationManager application.

In the initial version a CAPTCHA security key of Covr is used. The intention is that each customer applies for their own key.

cmRelationManager Setting:

This function can be deactivated by switching of its “visibility” in the “Identity Overview / Items” panel within the “Manage Account” view.



3. Attach a cc-email to an email address

Functional:

The user gets the possibility to couple a second email to a mail address. This way a user has the possibility to attach his/her “private” email address to his/her “professional” email address or vice versa.

If the mail address is set as being the main communication channel, then whenever a mail is send to that person a mail is send to the CC email address too.

Do know that there is **NO** relation between the “CC email address” in cmOffice and the “Cc” line in the mail header. On the contrary, the cmOffice CC email address is added to the mail address (separated by a semicolon) and will as such appear in the “To” line of the mail header.

cmRelationManager Setting:

Step into the raw XML and toggle the visibility of the following 2 parameters:

```
<parameter order="2" name="IblCommunicationTypeCCEmail" type="Label" visible="false" autogenerate="true"
designtip="CC Email">CC Email</parameter>
<parameter name="fieldCommunicationTypeCCEmail" type="Field" visible="false" required="false"
autogenerate="true"/>
```

4. CreateAccount redirects automatically to manageAccount

Functional:

An automatic redirect to “Manage Account” has been created. When somebody creates an account and reached the final (finish) step in which a popup window appears telling him/her that the creation of the account succeeded, he/she will be automatically redirected after X seconds to “Manage Account”. The “X” seconds can also be defined in the “Finish view” of “create account”.

cmRelationManager settings:

It is activated by giving the new parameter the value “true” and tick marking the “visibility” icon in the “Finish view” of “create account”.

<input type="text" value="true"/> <input checked="" type="checkbox"/> Visible
<div style="border: 2px solid green; padding: 2px;"> Enable redirect to Manage account (when activation is disabled) </div>
<input type="text" value="10"/> <input checked="" type="checkbox"/> Visible
When create account (without activation link) has finished, redirect to ManageAccount: delay in seconds

Precondition: the activation link functionality is NOT used.

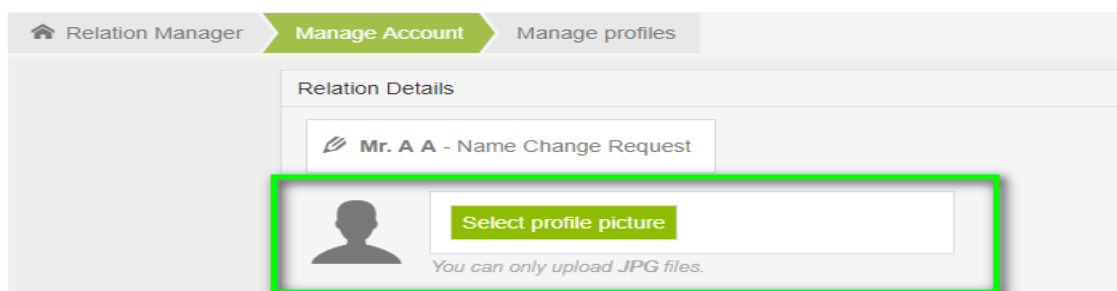
5. Upload picture

Preconditions:

- create a folder on the web server in which the pictures will be stored. The location of the folder needs to be defined in the raw XML. The parameter name is "fieldRelationUploadPath", the value is for instance E:\cmServerRelationPicts.
If you do not want to use the upload picture functions then fill out no value. An example:
`<parameter name="fieldRelationUploadPath" type="Field" visible="true"></parameter>`
- Settings in the cmOffice Admin table "default values": the variable "relationsPictureDir" needs to be set. Contact Covr support to have this done. Covr will assure that the security settings of that folder are such that the wright persons can write into the folder and subfolders.
- Please, inform COVR Support (support@covr.be) if you do want the "Upload picture" functionality. Covr will do the settings for you.

Functional:

If you click on "Select profile picture" a browser window will be displayed. You can then browse to your picture, select it and click on open. The picture will be uploaded.



The avatar window will now show the uploaded picture.

cmRelationManager setting:

This function can be deactivated by switching of its "visibility" in the "Manage Identity / Items" panel within the "Manage Account" view.

<input type="text" value="Select profile picture"/> <input checked="" type="checkbox"/> Visible

Select profile picture button text

6. Change password

The change password functionality is implemented via a perma-link. An example of such a link is:
[https://cm.covr.be/cmGatewayPortal/<ConfCode>/index.html?module=RelationManager&personid={personid}&key={\\$shakekey}#managerrelation/changepassword](https://cm.covr.be/cmGatewayPortal/<ConfCode>/index.html?module=RelationManager&personid={personid}&key={$shakekey}#managerrelation/changepassword).

A perma-link can be integrated in any panel of the relation manager. You need an example? Contact Covr (support@covr.be)