



logicpath

C3 Financial

Login Issues

2020

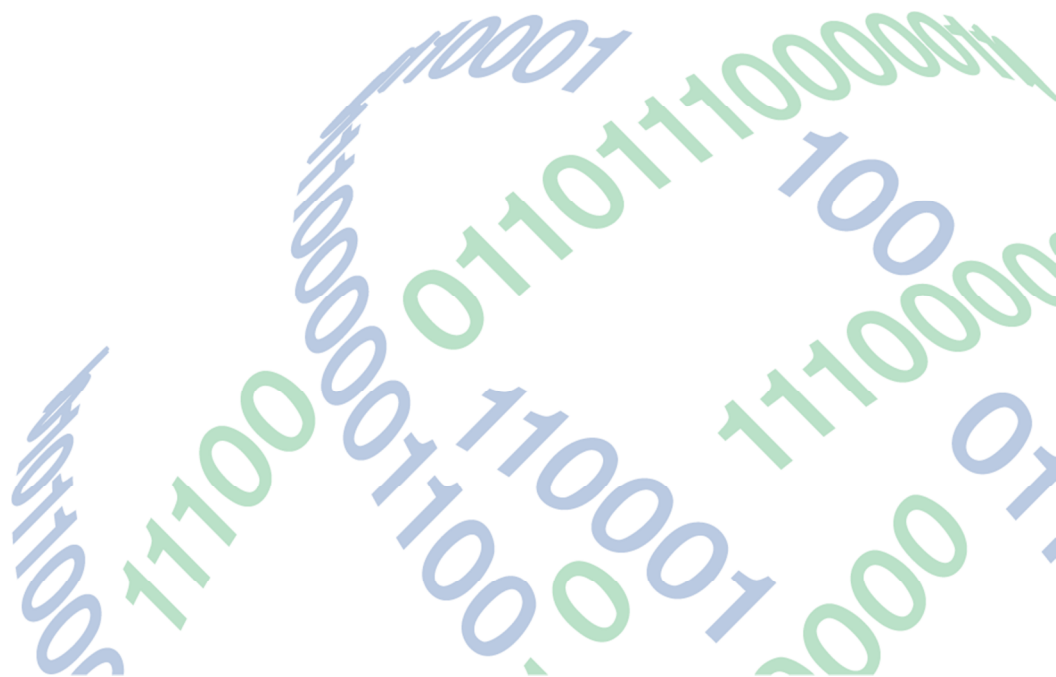
3325 Paddocks Pkwy, Ste 400
Suwanee GA 30024

☎ 1.877.495.0687

☎ 678.679.5191

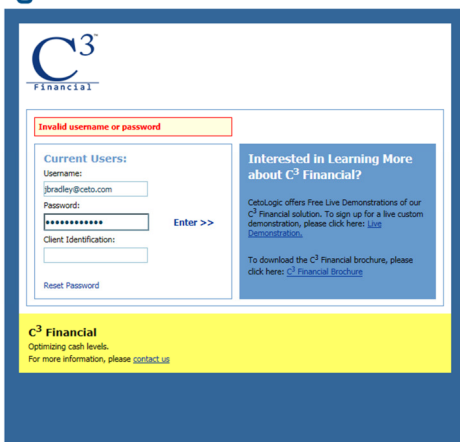
✉ info@logicpath.com

🌐 www.logicpath.com

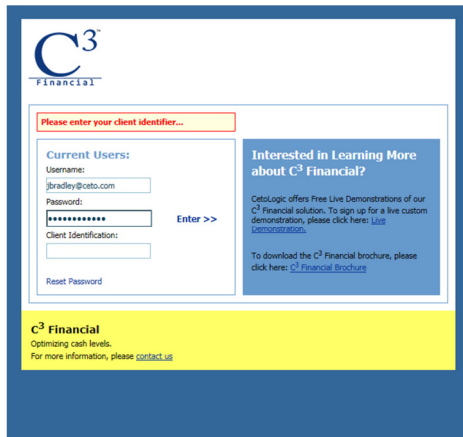




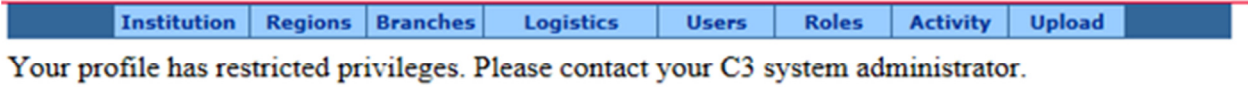
- 1. ISSUE: Error message: "Invalid login name and/or password"**
 - RESOLUTION: Verify that the user has been set-up on the User Management screen.
 - RESOLUTION: Verify the username entered match that on the User Management screen.
 - RESOLUTION: If the username matches the User Management screen, change the password on the User Management screen and have the user try to login again.



- 2. ISSUE: Error message: "Please enter your client identifier"**
 - RESOLUTION: If you are using an email address as the username, verify that the user entered his/her full email address.
 - RESOLUTION: If you are not using an email address as the username, verify that the user entered the client identifier assigned to their institution in the Client Identification field.



3. ISSUE: Error message: "Your profile has restricted privileges."



- RESOLUTION: The user has not been given assigned to a branch within C³.

The screenshot shows the User Management interface. A table lists users with columns for First Name, Last Name, Phone, and Email. The user 'Troy Beaumont' is highlighted. Below the table, there are sections for Application Attributes, Personal Info, and a tree view for assigning permissions to Institutions, Regions, and Branches. Red arrows point from the instructions on the right to the 'Permissions' button, the user 'Troy Beaumont', and the 'Ceto Demo Institution' folder in the tree view.

- access the User Management screen, highlight the user in the User Directory and click the Permissions button.
- Select the check box next to the Institution name if the User should have permission to all Regions and Branches.
- Click the folder next to the Institution name to expand for more options. If Regions exist it will be displayed.
- Select the check box next to a Region(s)
- if the User should have permission to all the Branches within the Region(s).
- Click on the Region to display more options.
- Select the appropriate branch or branches the user should have access to
- Click Save.



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