

# Zhen CRM User Guide

## Using CRM

A user with a group of employees can use CRM by first logging in.

## Login in

Type the URL of Zhen CRM in your browser and click **Enter**. You should see a login page like the image below.

**Zhen CRM**

DASHBOARD CONTACTS DEALS CALENDAR

You need to login!!

Please enter your username and password

Username

Password

Remember me

[Login](#) [Forgot password? Click here](#)

Enter your username and password and then click on the **Login** button. If the login is successful, you will be redirected to the **Dashboard** page as shown below.

**Zhen CRM**

DASHBOARD CONTACTS DEALS CALENDAR

Hi, Adam Smith Admin Logout

### My Contacts [+ New](#)

Name	Status	Company	City	Phone #
Kiyak Oshin	Opportunity	Ozinbo	Koyot	879
Dwyan Karr	Account	Kar-pharma	Thimpu	36787786
Sweeny Hunt	Opportunity	Jak-hud	Toranto	6767845645
Ranch Malesia	Lead	Roky	Dakota	546567765

### Deal Growth Chart

Title	Start	End	Status
Party	2014-01-08 06:52:00	2014-01-08 06:52:00	Scheduled
Test	2013-07-07 16:51:00	2013-07-07 20:00:00	Scheduled
Dinner	2013-07-16 08:25:00	2013-07-16 13:19:00	Scheduled
1	2013-03-01 06:06:00	2013-03-01 06:06:00	Scheduled

### My Deals [+ New](#)

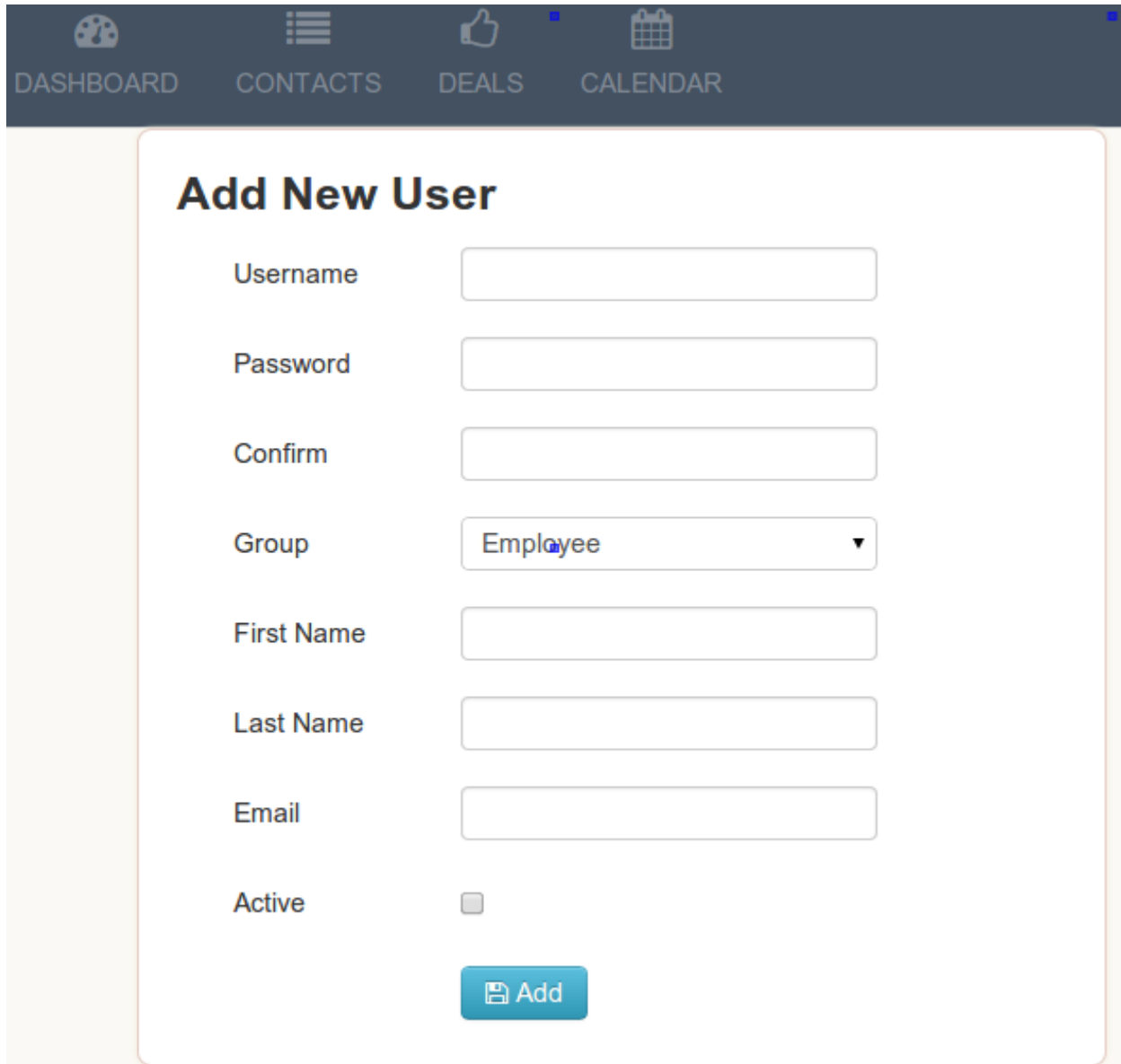
Amount	Contact Name	Status	Date
\$76.00	Kiyak Oshin	Accepted	2014-01-08 06:52:00
\$1,000.00	Lauren Duke	Process	2013-04-15 00:00:00
\$7,744.00	Lauren Duke	Rejected	2013-04-16 00:00:00
\$15,000.00	Dwyan Karr	Rejected	2013-04-18 07:37:00

### My Events [+ New](#)

Title	Start	End	Status
Party	2014-01-08 06:52:00	2014-01-08 06:52:00	Scheduled
Test	2013-07-07 16:51:00	2013-07-07 20:00:00	Scheduled
Dinner	2013-07-16 08:25:00	2013-07-16 13:19:00	Scheduled
1	2013-03-01 06:06:00	2013-03-01 06:06:00	Scheduled

## Creating a User

1. Login with the administrator username and password.
2. Click on **Admin>Users** from the top-right menu.
3. Now click on the **Add new user** button.



The screenshot shows a dark blue navigation bar at the top with icons and labels for 'DASHBOARD', 'CONTACTS', 'DEALS', and 'CALENDAR'. Below this is a white form titled 'Add New User'. The form contains the following fields and controls:

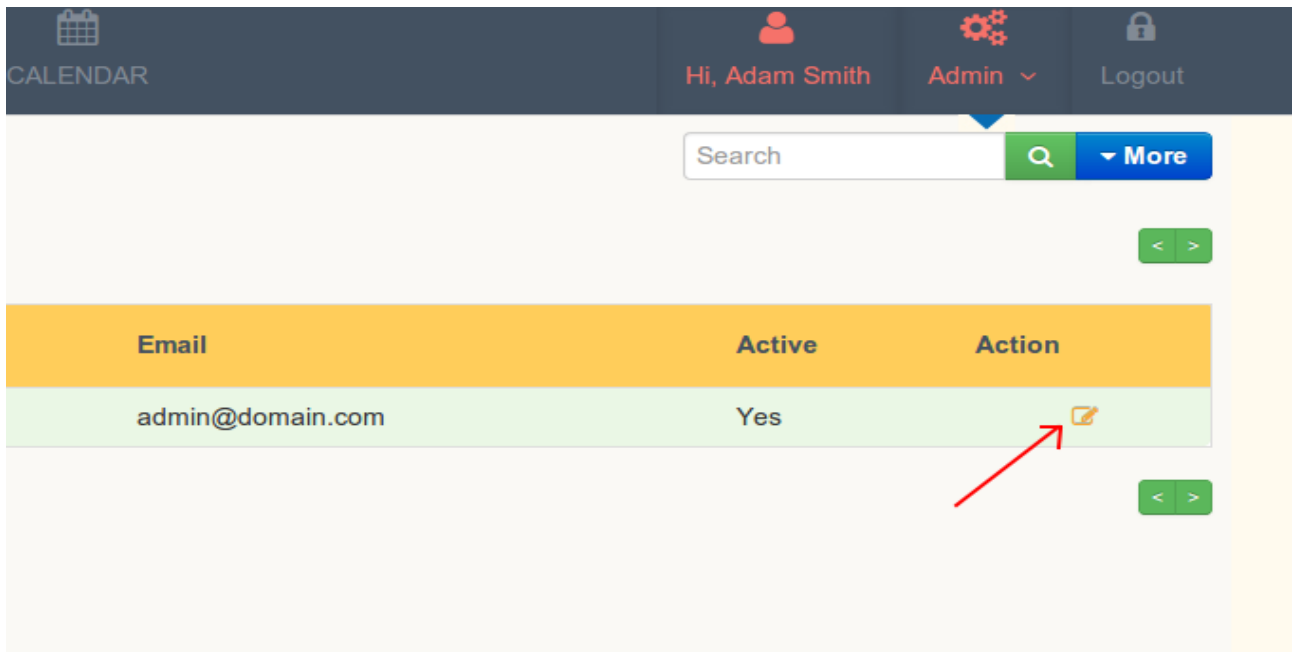
- Username**: A text input field.
- Password**: A text input field.
- Confirm**: A text input field.
- Group**: A dropdown menu with 'Employee' selected.
- First Name**: A text input field.
- Last Name**: A text input field.
- Email**: A text input field.
- Active**: A checkbox that is currently unchecked.
- Add**: A blue button with a plus icon and the text 'Add'.

4. Fill in the form. The Username should be unique.
5. Select a user group. The Administrator group has full rights and can manage the CRM application, whereas the Employee group has limited permissions.
6. Click on **Add** button. A success message should appear.
7. Enter a valid email address. This email is to be used to reset passwords of the users, in case they have forgotten.

## Editing user details

1. Click on **Admin>Users** from the top-right menu.

2. A list of users will appear. Now click on the **Edit** icon (indicated with the arrow below), which is under the **Action** column.



3. Edit the details; provide a new password if you want to change it, otherwise leave it blank.

## Manage Settings

1. Go to **Admin > Settings**.

The screenshot shows a dashboard header with icons for 'SHBOARD', 'CONTACTS', 'DEALS', and 'CALENDAR'. The main content area is titled 'Edit User' with a green plus icon and a 'User List' button. The form contains the following fields:

- Username: admin
- New Password:
- Confirm New Password:
- Group: Administrator
- First Name: Adam
- Last Name: Smith
- Email: admin@domain.com

A red note next to the password fields says: 'Enter new password to change, else leave it blank'. A 'Save' button is at the bottom.

DASHBOARD CONTACTS DEALS

## Edit Title

Title

Logo  No file chosen

Copyright Text

Show copyright in footer

E-mail address

E-mail name

Currency

2. The User can change the application settings here, such as: currency, footer text, title etc.

## Manage Contacts

1. Click on **Contacts** from the top-menu. A contacts list will appear.

**Contacts**

First Name	Last Name	Status	Company	City	Phone #	E-mail
Kiyak	Oshin	Opportunity	Ozinbo	Koyot	879	kkkk@kldldl.cc
Dwyan	Karr	Account	Kar-pharma	Thimpu	36787786	ghyfh@jgklhl.nj
Sweeny	Hunt	Opportunity	Jak-hud	Toranto	6767845645	gfgytrcr@hgjh.hg
Ranch	Malesia	Lead	Roky	Dakota	546567765	hghgjj@jhghj.hg
Si	Huan	Opportunity	Tyco	Xianging	46768898	hgvjghvyt@jhkhk.hh
Lauren	Duke	Opportunity	Nitlo	Waterloo	5678876659	sfddgd@ddd.com

2. Click on the **Add New Contact** button.

The screenshot shows a CRM interface with a dark blue header containing navigation icons and labels: DASHBOARD, CONTACTS (highlighted), DEALS, and CALENDAR. Below the header is a white modal window titled "Add New Contact". The form contains the following fields and elements:

- First Name:** A text input field.
- Last Name:** A text input field.
- Photo:** A file upload area with a "Choose File" button and the text "No file chosen".
- Company:** A text input field.
- City:** A text input field.
- Phone:** A text input field.
- Email:** A text input field.
- Contact Status:** A set of three radio buttons labeled "Lead" (selected), "Opportunity", and "Account".
- Buttons:** Two buttons at the bottom: "Add" (with a document icon) and "Cancel" (with a back arrow icon).

3. Fill in the details. Then click on the **Add** button.
4. A success message will appear.

### View Contact Details

1. Click on the Contact name from the contact list to view details.

### Edit Contact

1. Click on the **Edit** icon in the **Action** column.

**CONTACTS**

## Edit Contact

**Contact Status** Lead **Opportunity** Account

First Name

Last Name

Photo  No file chosen

Company

City

Phone

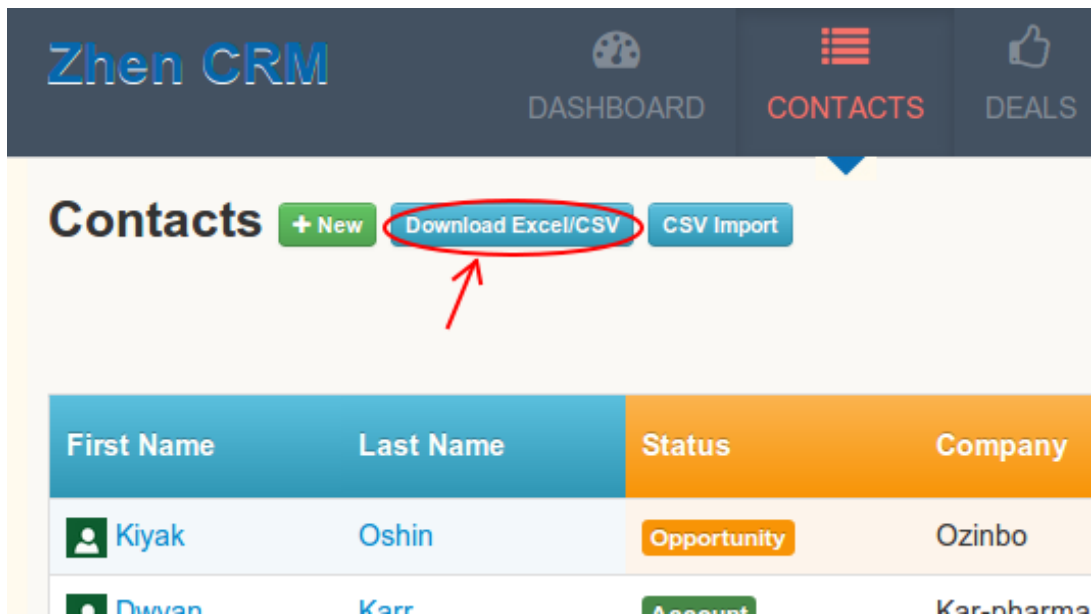
Email

2. Edit the details and click the **Save** button.
3. You can also delete a contact from here by clicking on the **Delete** button on the bottom right.

Please note that a user can also view the contacts added by all other users, but can only edit or delete the contacts they have added.

### Export Contact Data

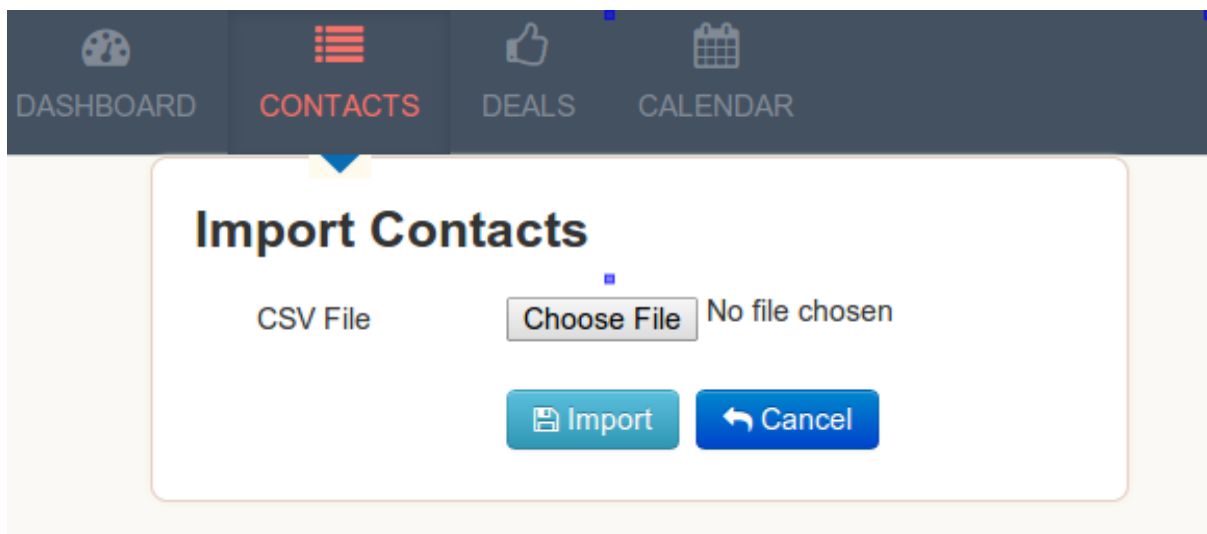
1. Click on the **Download Excel/CSV** button.



2. Save a csv file to the computer.

### Import Contact

1. Click on the **Import CSV** Button in the Contacts list page.
2. A new page will load.



3. Select csv file to upload from your computer.
4. Click on the **Import** button.

### Manage Deals

#### View Deals

1. Click on **Deals** on the top menu. A deal list page will appear.

## View Deals Details

1. Click on **Deals Amount** in the deal list, to view its details.

**Deal Details** [Edit](#)

Contact Name:	Lauren Duke
User's Name:	Adam Smith
Amount:	\$1,000.00
Date:	2013-04-15 00:00:00
Status:	<span>Process</span>

[Back](#)

## Add New Deal

1. Click on the **New Deal** button.
2. Select a contact from the list.

**Add New Deal**

Contact:

Amount:

Date:

Deal Status:  Process  Accepted  Rejected

[Add](#) [Cancel](#)

3. Enter the amount and other details.
4. Click on the **Add** button.



## Edit Deal

1. Click on the **Edit** icon in the Action column from deal list.
2. Change the deal details and click the **Save** button.
3. You can also delete a deal by clicking the **Delete** button in the bottom right corner.

Note that you can view deals made by all users but you can only edit or delete the deals that you have created.

## Manage Events

Click on calendar in the menu at the top.  
You will see events in the calendar view.

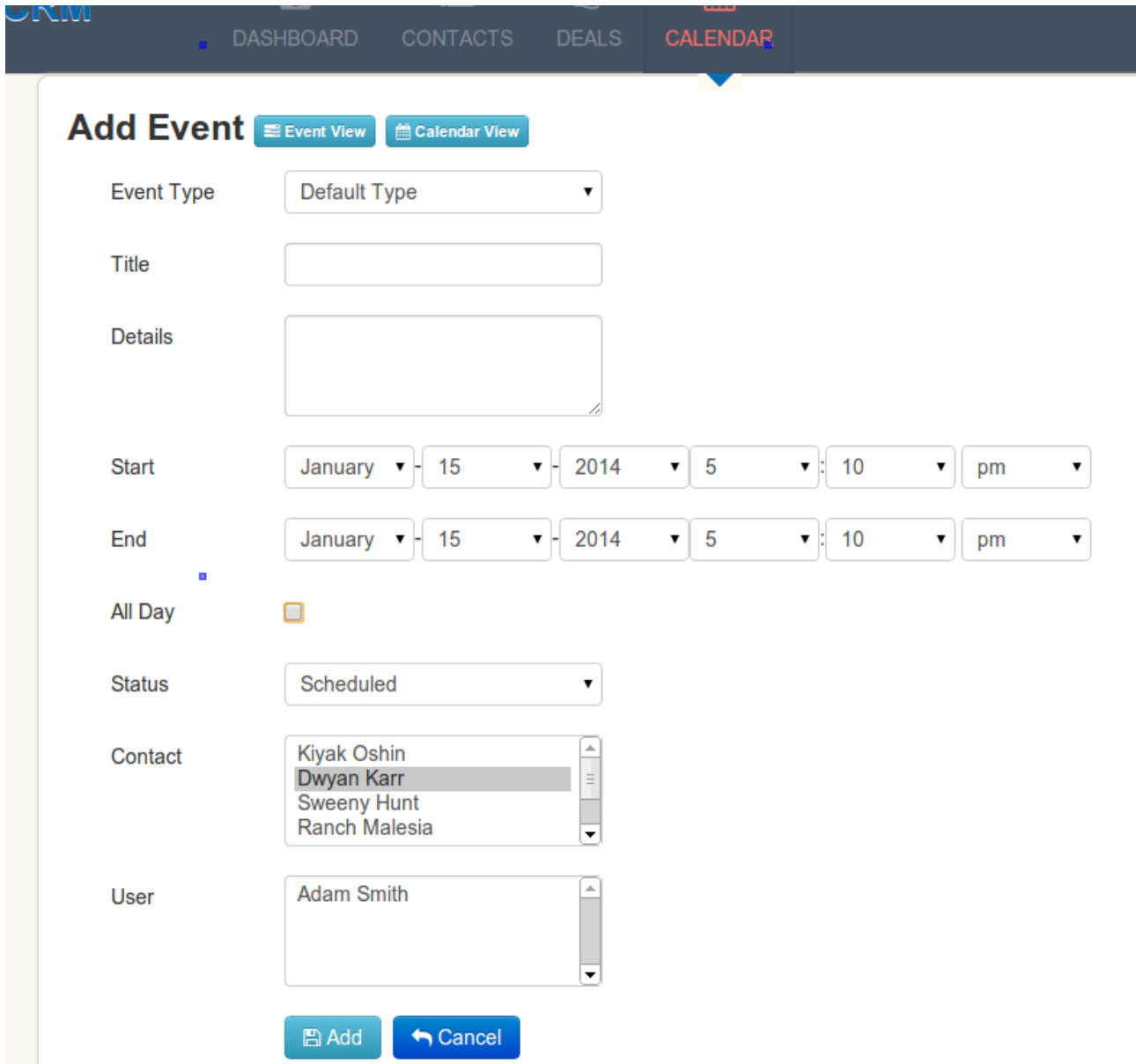
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You can also view Events in the list view by clicking on the **Event View** button at the top of the calendar.

Title	Event Type	Status	Contacts	Users	Start	End	All Day	Action
Party	Default Type	Scheduled	Kiyak Oshin, Dwyan Karr, Sweeny Hunt, Ranch Malesia,		2014-01-08 06:52:00	N/A	Yes	
Test	Default Type	Scheduled			2013-07-07 16:51:00	2013-07-07 20:00:00	No	
Dinner	Default Type	Scheduled	Tony West,		2013-07-16 08:25:00	2013-07-16 13:19:00	No	
event 1	Default Type	Scheduled			2013-02-16 14:18:00	2013-02-16 15:18:00	No	

## Add Event

1. Click on the **New Event** button above the calendar or on the events list.



The screenshot shows the 'Add Event' form in a CRM system. The form is titled 'Add Event' and has two tabs: 'Event View' (selected) and 'Calendar View'. The form fields are as follows:

- Event Type:** A dropdown menu with 'Default Type' selected.
- Title:** A text input field.
- Details:** A large text area for entering event details.
- Start:** A date and time picker showing January 15, 2014, at 5:10 pm.
- End:** A date and time picker showing January 15, 2014, at 5:10 pm.
- All Day:** A checkbox that is currently unchecked.
- Status:** A dropdown menu with 'Scheduled' selected.
- Contact:** A dropdown menu with a list of contacts: Kiyak Oshin, Dwyan Karr (highlighted), Sweeny Hunt, and Ranch Malesia.
- User:** A dropdown menu with 'Adam Smith' selected.

At the bottom of the form are two buttons: 'Add' and 'Cancel'.

2. Enter the event title, description, and the start-and-end dates and times.
3. You can also select one or more contacts and users for the event.
4. Click on the **Save** button to add an Event.

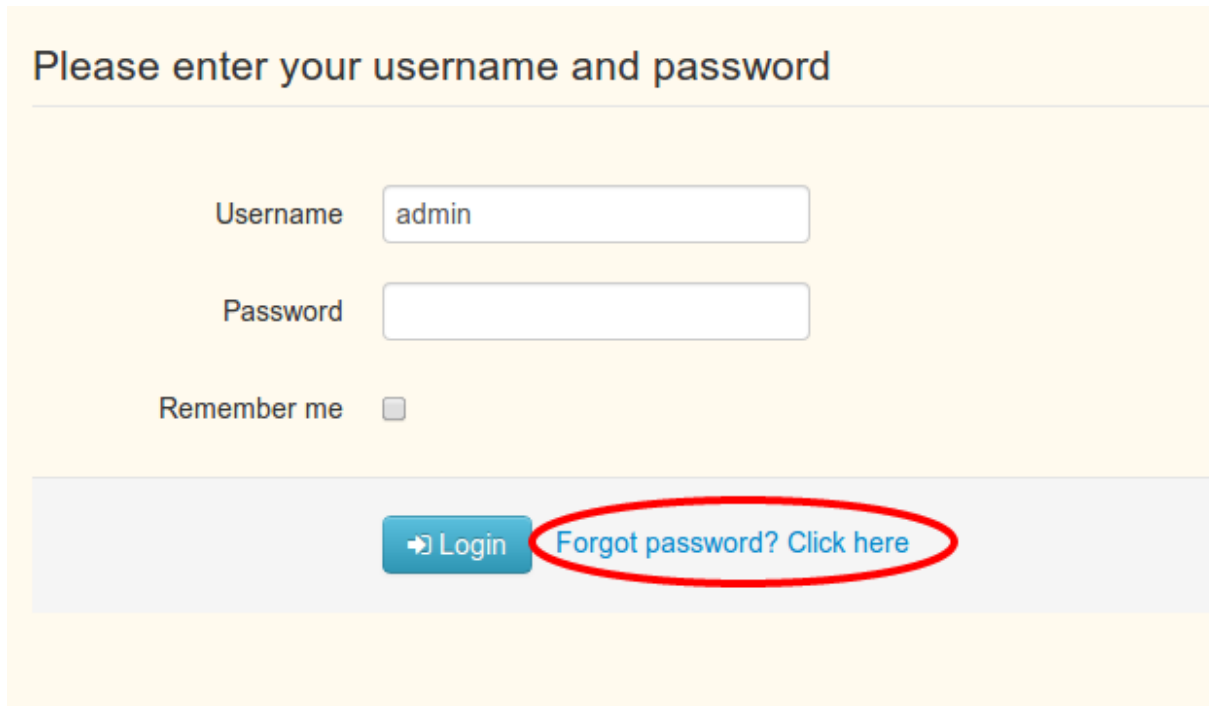
## Edit Event

1. Click on the Edit icon in the **Action** column from the events list.
2. Make changes and click on the **Save** button.
3. You can also delete an event from here by clicking the **Delete** button at the bottom right of the page.

## Edit profile

After logging in, click on **Username** in the top menu.

Then edit your details and click the **Save** button.



The image shows a login form with a light yellow background. At the top, it says "Please enter your username and password". Below this, there are two input fields: "Username" with the text "admin" and "Password" which is empty. There is a "Remember me" checkbox which is unchecked. At the bottom, there is a blue "Login" button with a right-pointing arrow, and a blue link "Forgot password? Click here" which is circled in red.

## Reset Password

1. In case you have forgotten your password click on the “[Forgot password? Click here](#)” link in the login page.
2. You will be redirected to another page. Enter your username and click on **Send Reset link** button. You will see a message “*Password reset link has been sent to your email. Please check your mail.*”
3. You will receive an email with a reset link. Click on the link or copy and paste it in your browser.
4. If the link is valid then you will see a message that says “*Temporary Password has been sent to your email.*”
5. Next, check your mail again, use the temporary password to login and change your password of your choice afterwards.