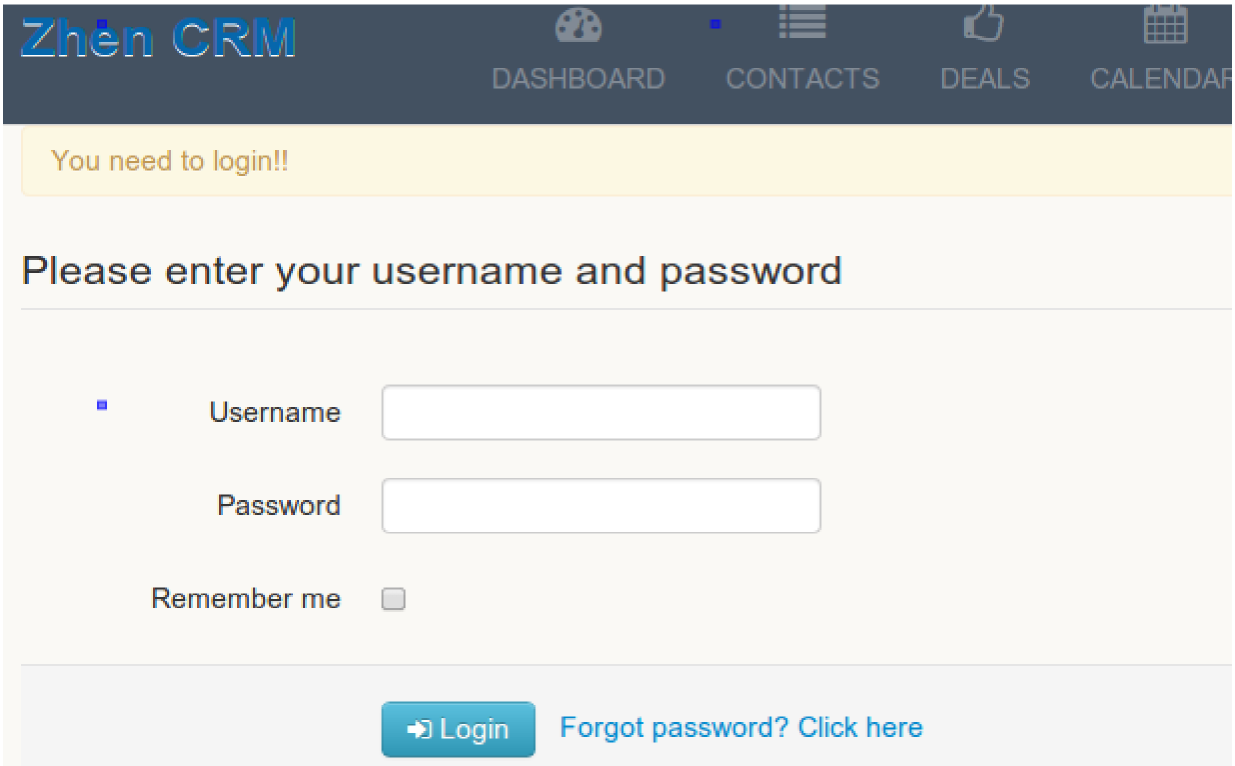
Zhen CRM User Guide

Using CRM

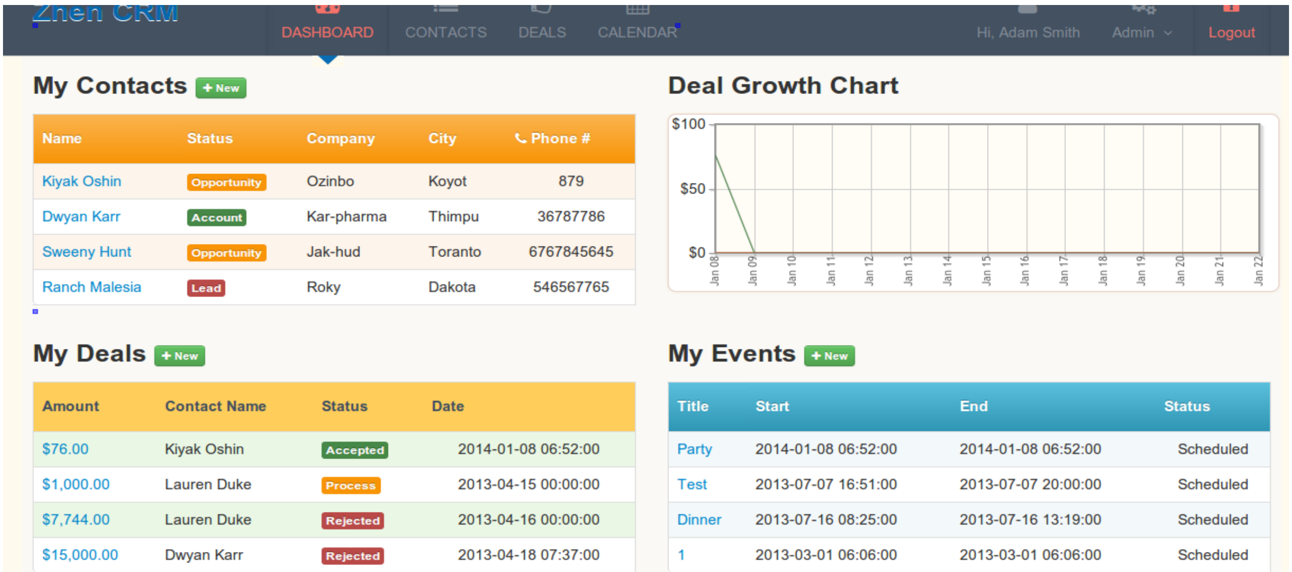
A user with a group of employees can use CRM by first logging in.

Login in

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

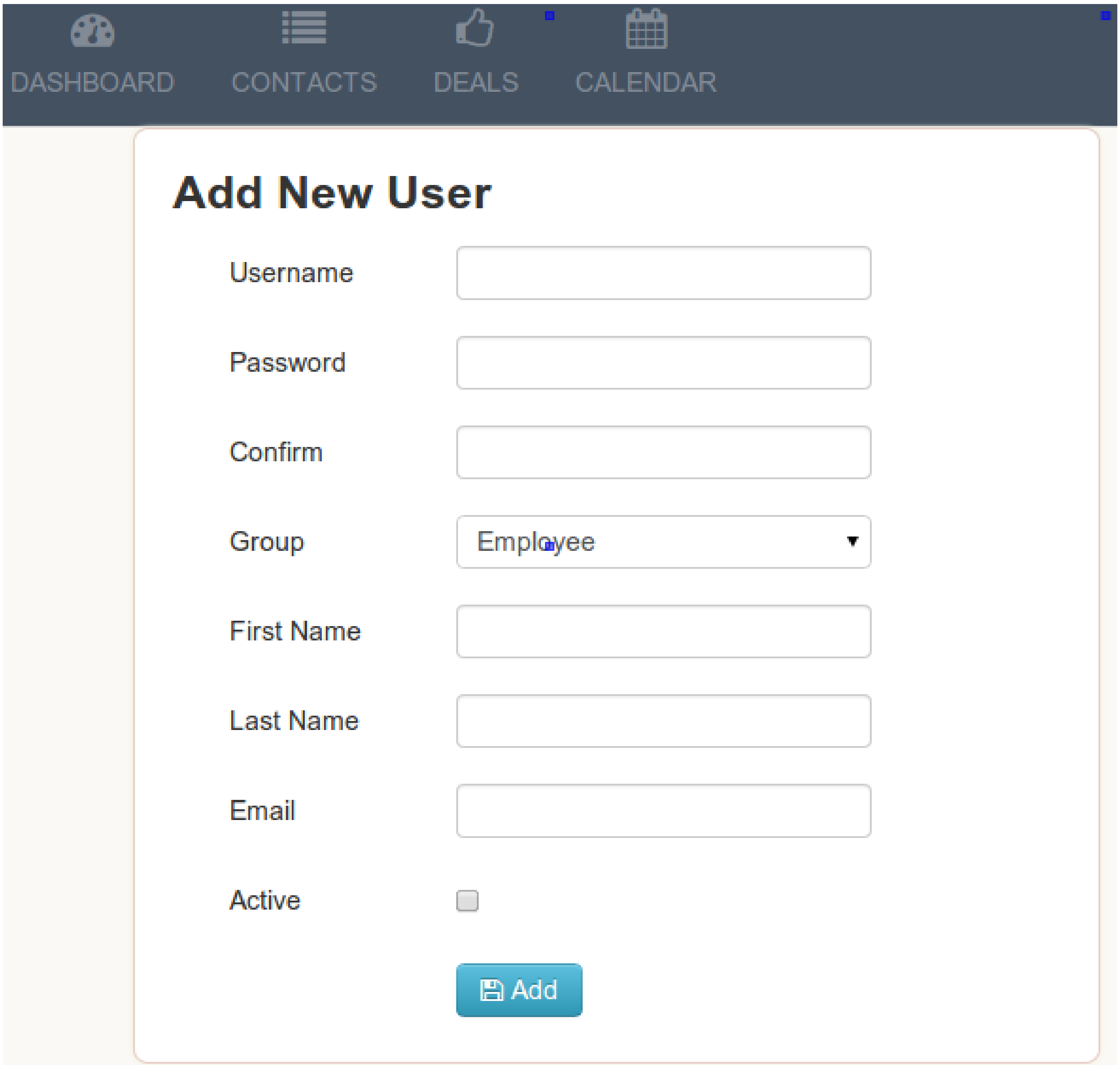


Enter your username and password and then click on the **Login** button. If the login is successful, you will be redirected to the **Dashboard** page as shown below.



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.

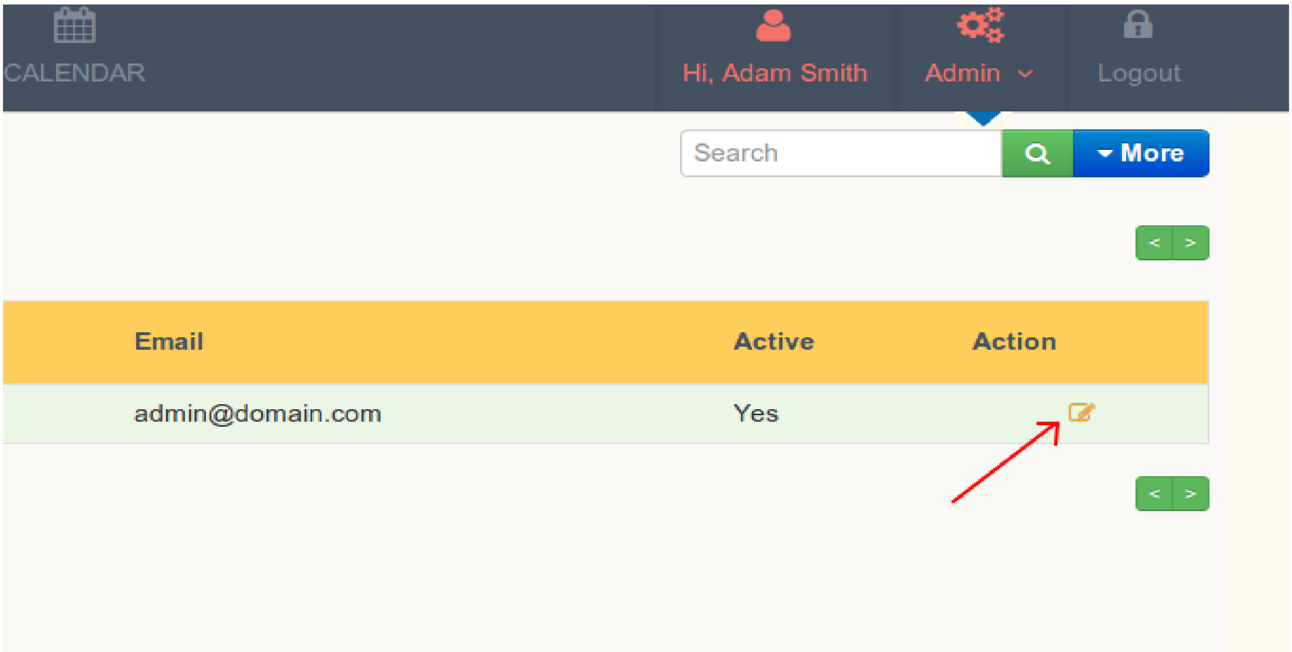


4. Fill in the form. The Username should be unique.
5. Select a user group. The Administrator group has full rights and can manage the CRM application, whereas the Employee group has limited permissions.
6. Click on **Add** button. A success message should appear.
7. Enter a valid email address. This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

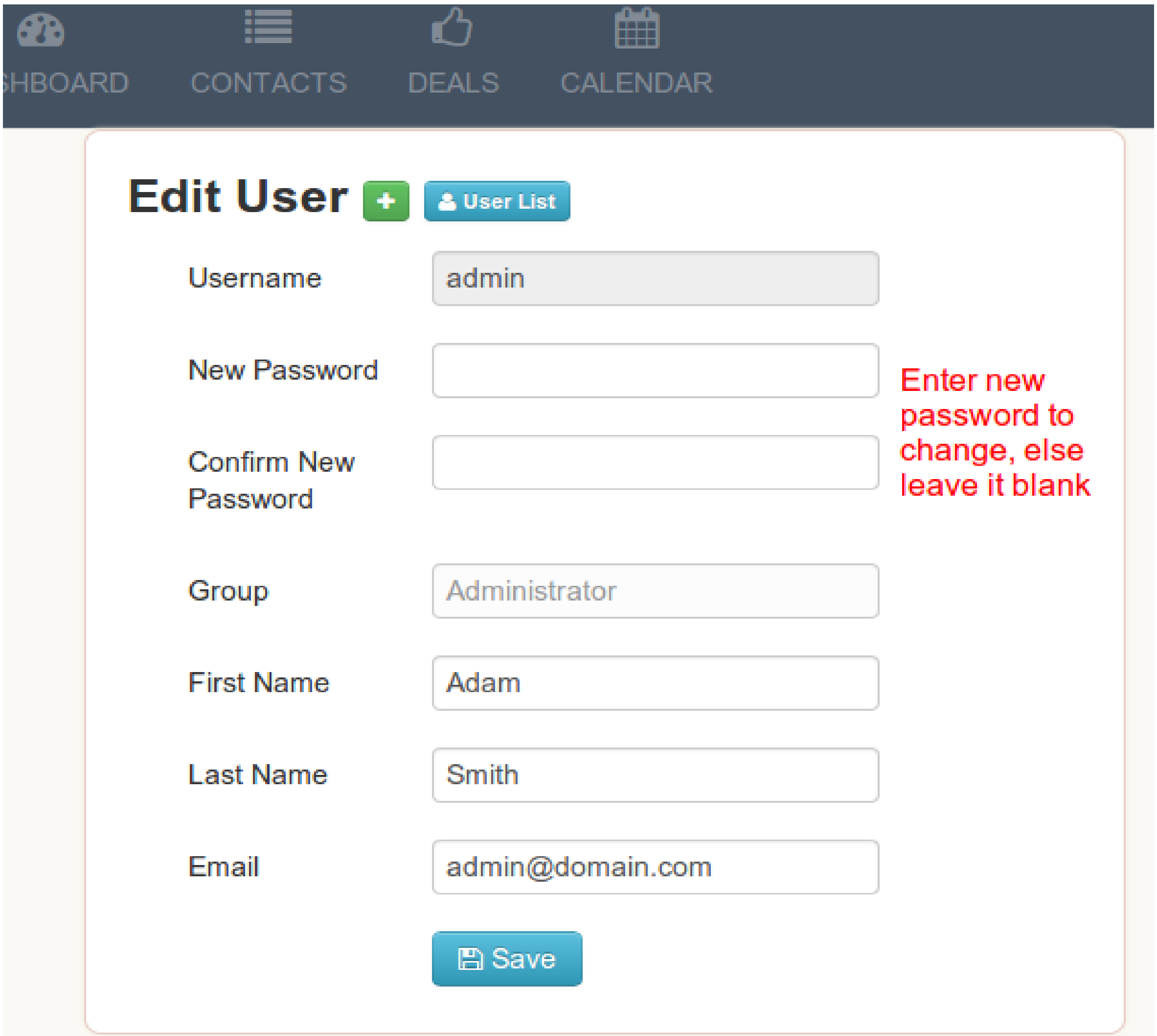
2. A list of users will appear. Now click on the **Edit** icon (indicated with the arrow below), which is under the **Action** column.

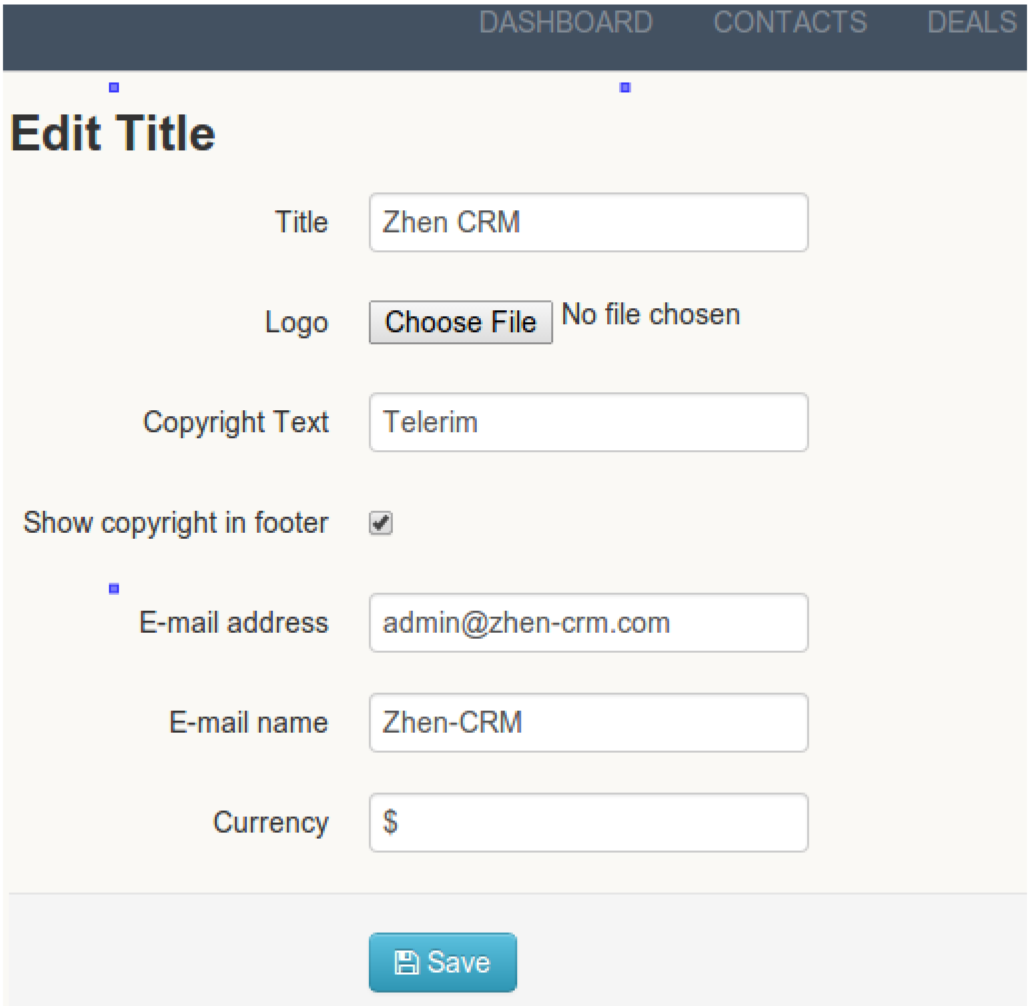


3. Edit the details; provide a new password if you want to change it, otherwise leave it blank.

Manage Settings

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

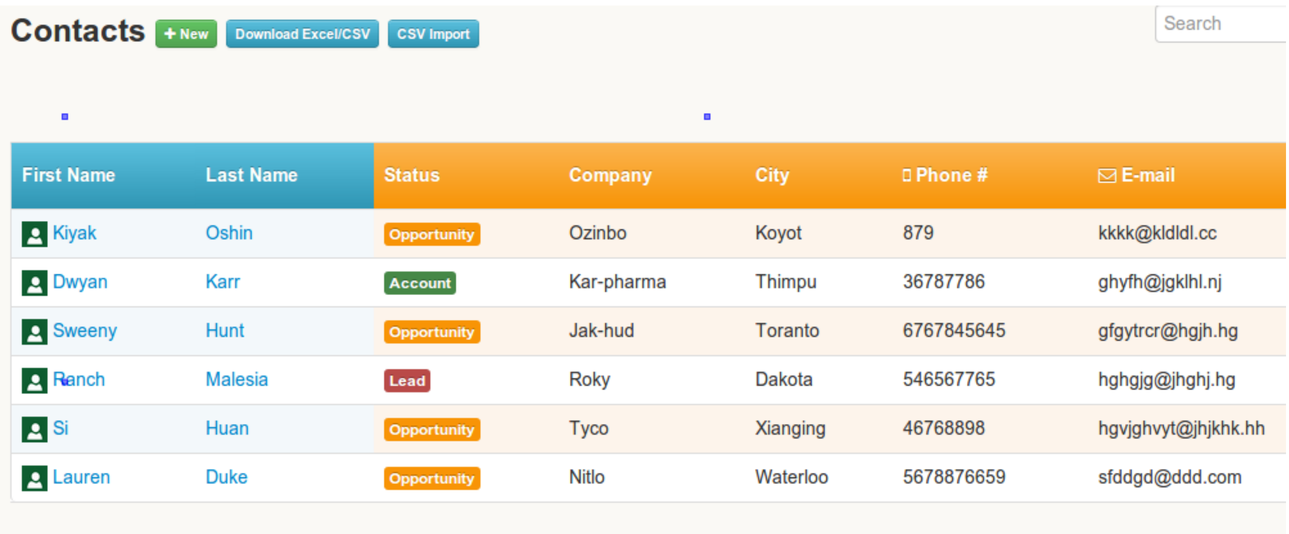




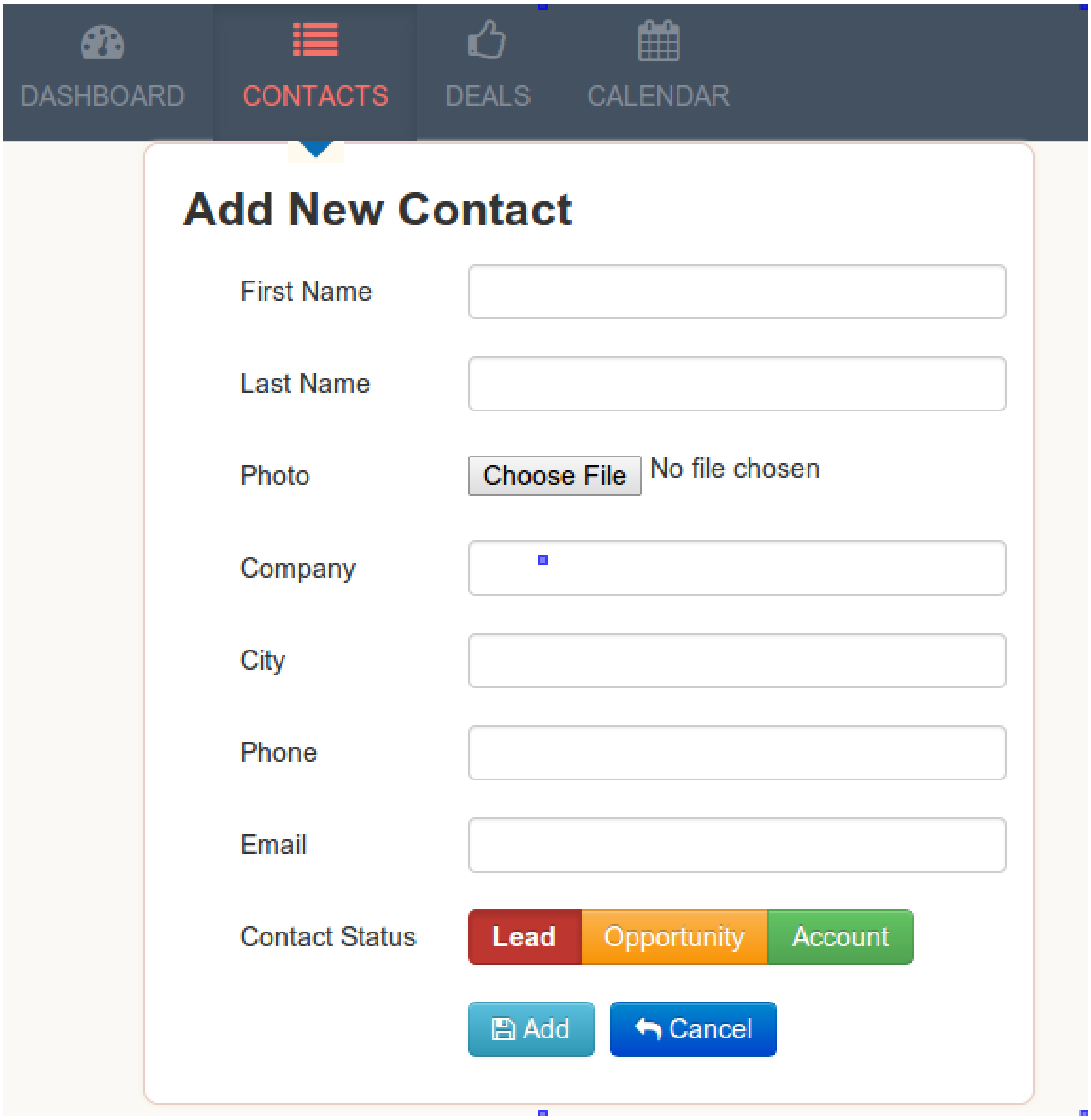
2. The User can change the application settings here, such as: currency, footer text, title etc.

Manage Contacts

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



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



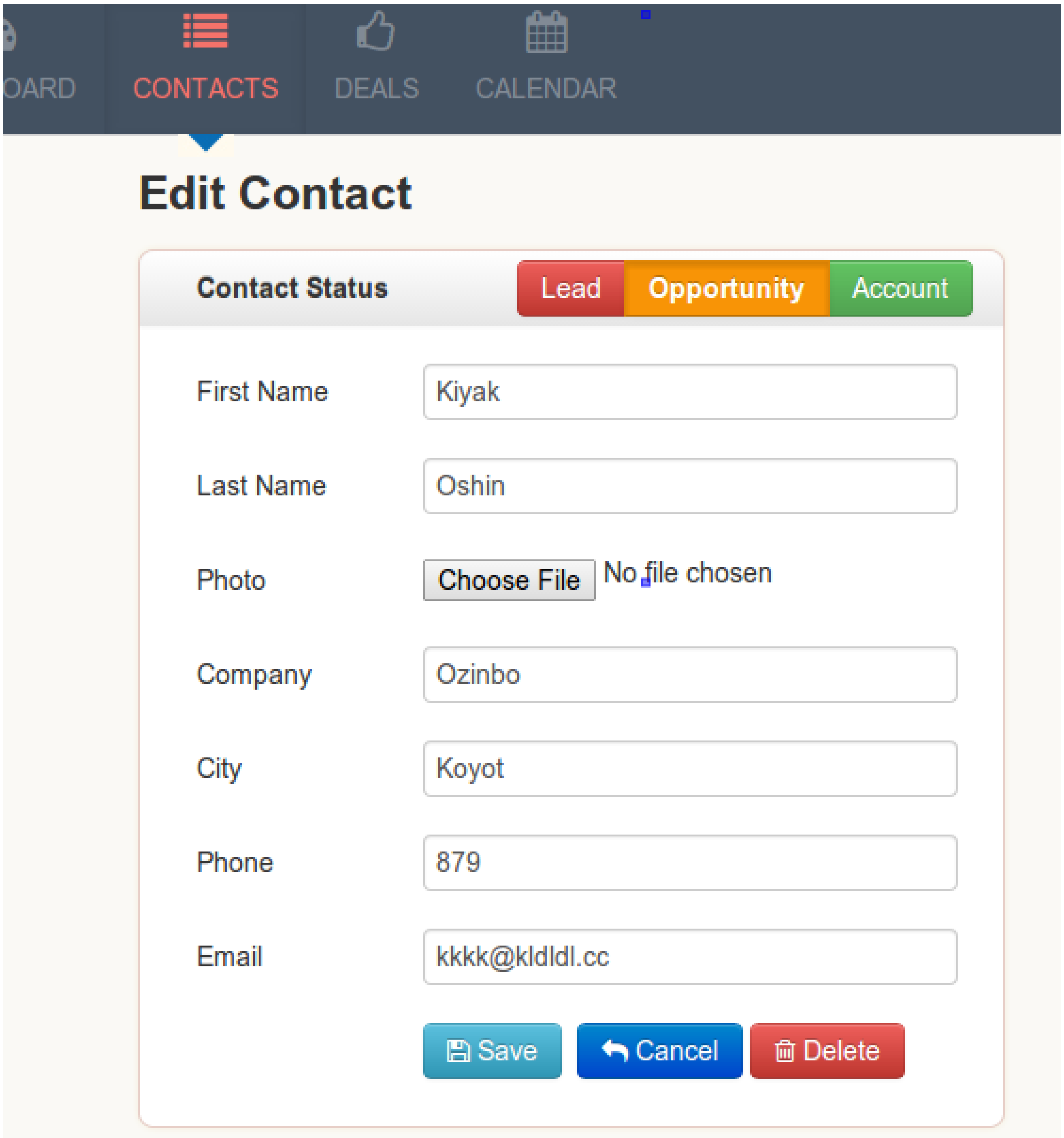
3. Fill in the details. Then click on the **Add** button.
4. A success message will appear.

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.

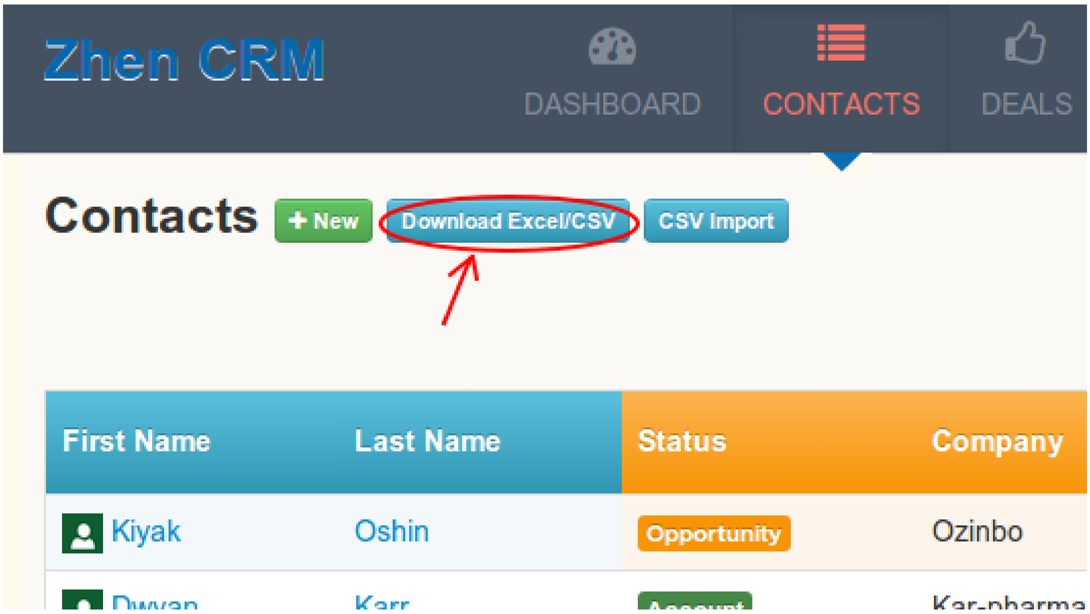


2. Edit the details and click the **Save** button.
3. You can also delete a contact from here by clicking on the **Delete** button on the bottom right.

   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

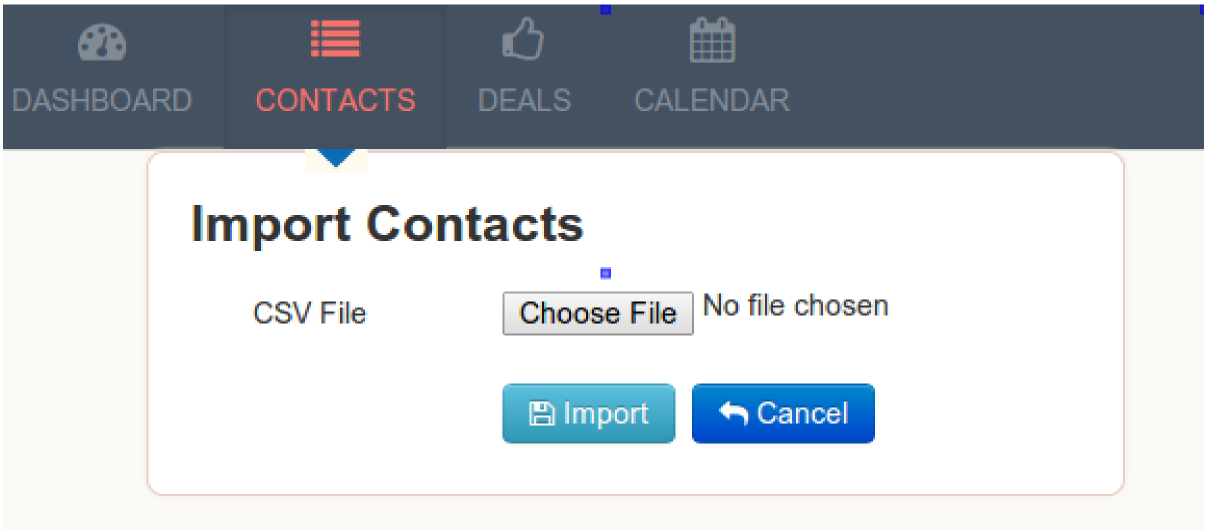
1. Click on the **Download Excel/CSV** button.



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.

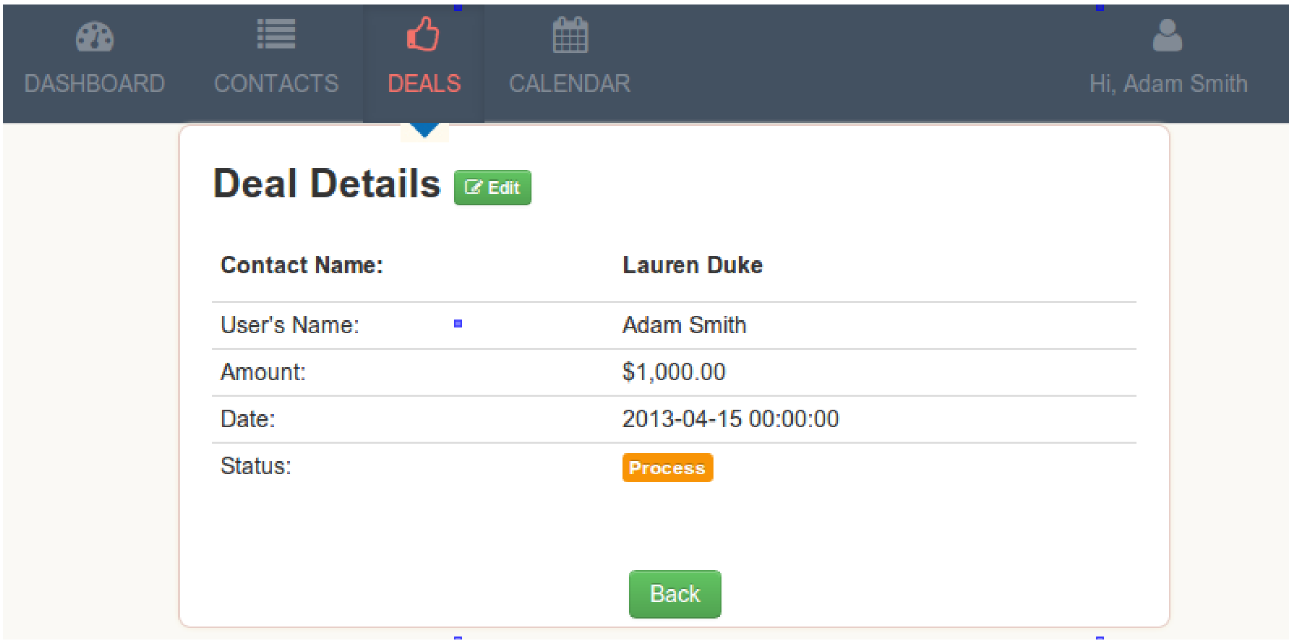
Manage Deals

View Deals

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

View Deals Details

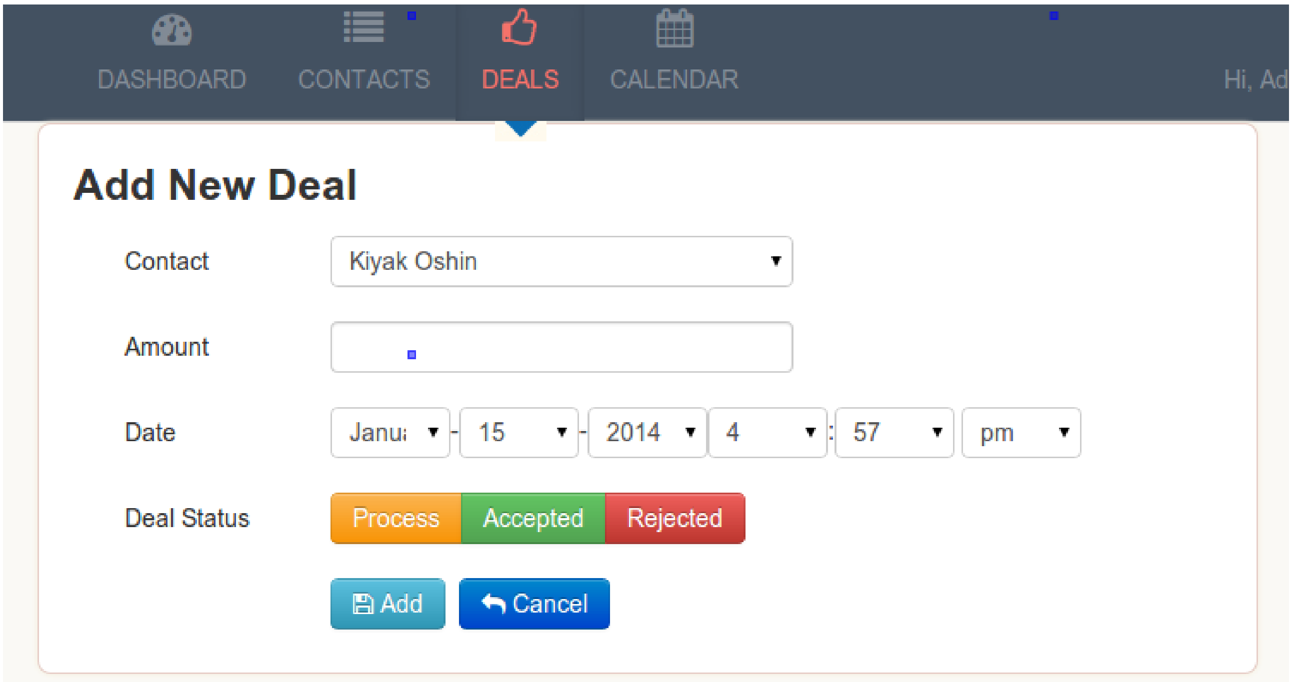
1. Click on **Deals Amount** in the deal list, to view its details.



Add New Deal

1. Click on the **New Deal** button.

2. Select a contact from the list.



3. Enter the amount and other details.

4. Click on the **Add** button.

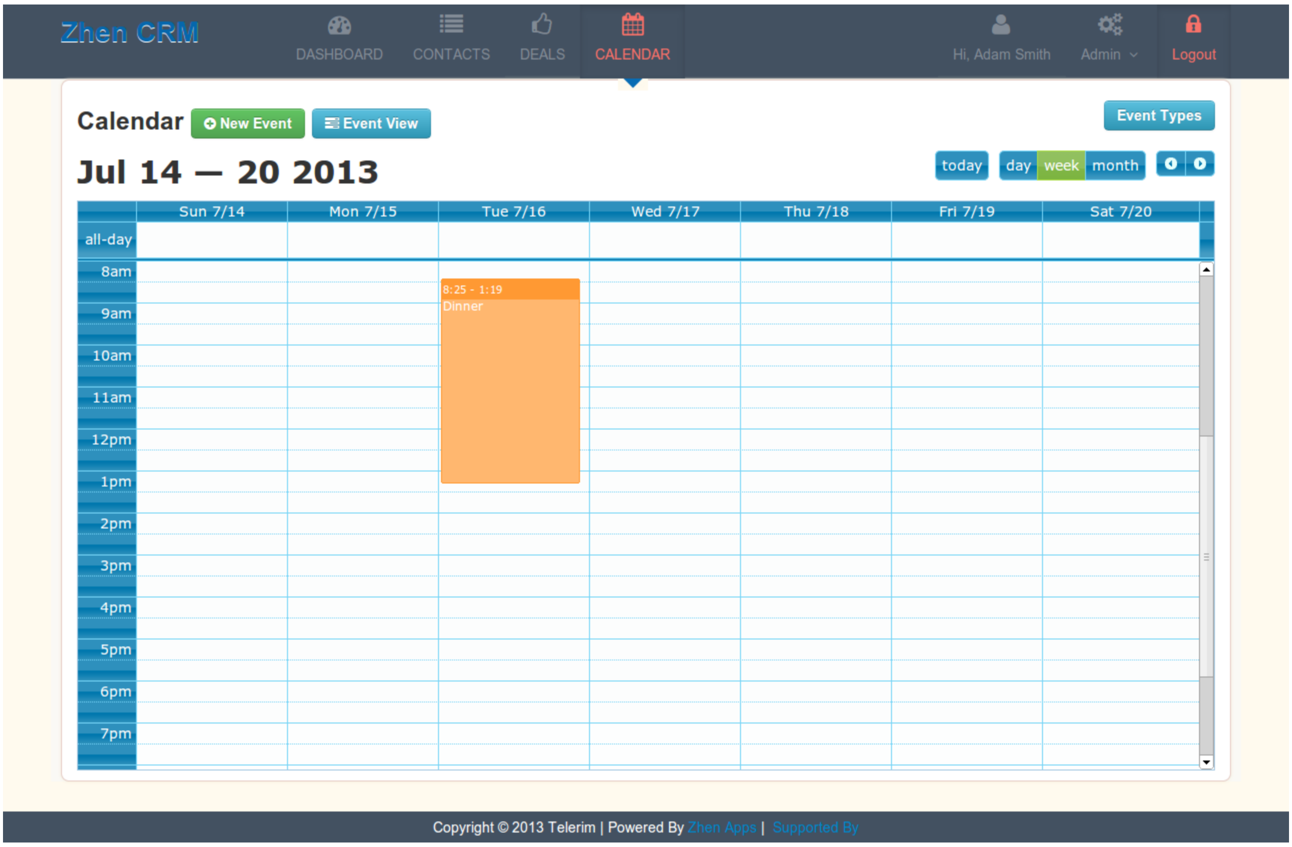
Edit Deal

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.

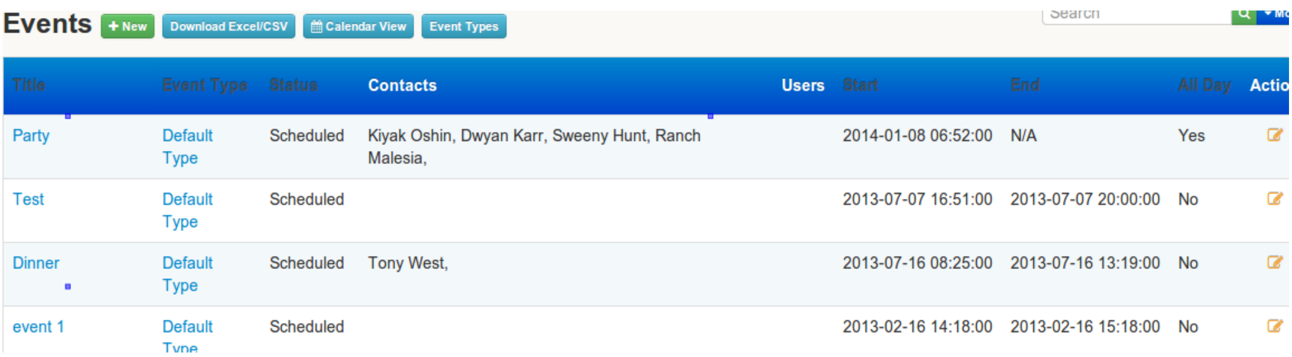
Note that you can view deals made by all users but you can only edit or delete the deals that you have created.

Manage Events

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



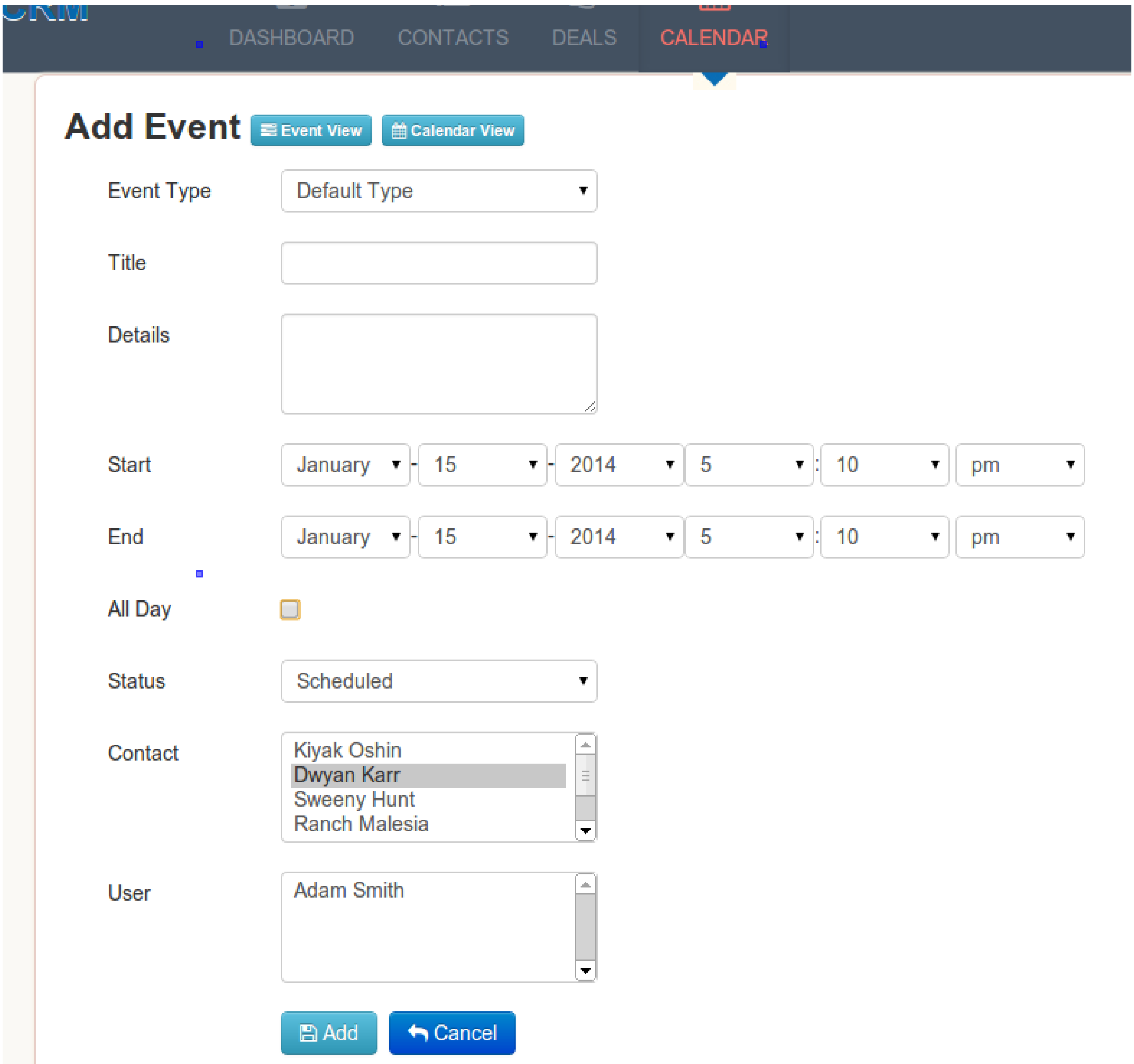
You can also view Events in the list view by clicking on the **Event View** button at the top of the calendar.



Title	Event Type	Status	Contacts	Users	Start	End	All Day	Actio
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.



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.

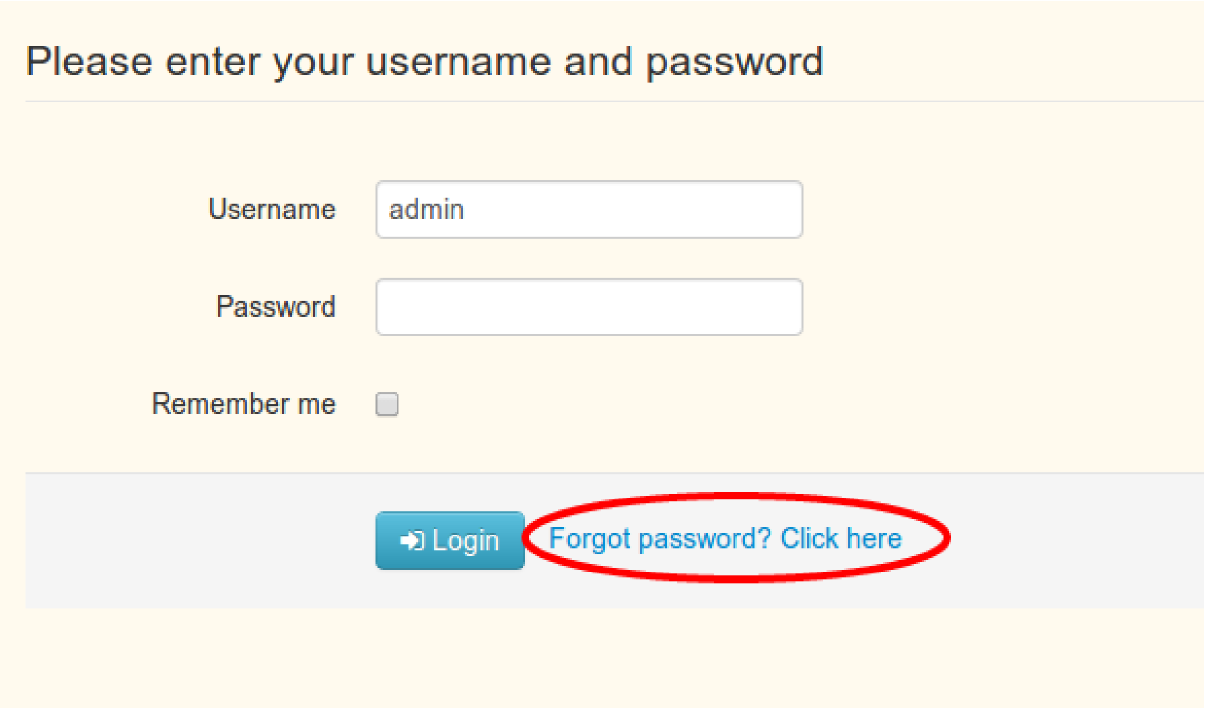
2. Make changes and click on the **Save** button.

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.



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.