# User Manual for Cloud-Based Customer Management System

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Application Walkthrough: https://www.youtube.com/watch?v=sML4qckJB04

## System Requirements

To use the cloud-based customer management system, ensure that your system meets the following requirements:

Web Browser: Latest versions of Google Chrome, Mozilla Firefox, Safari, or Microsoft Edge.

Internet Connection: A stable internet connection for accessing the system online.

Device Compatibility: The system is designed to work on desktops, laptops, tablets, and mobile devices.

## Installation Guide

The cloud-based customer management system does not require installation as it is accessed via a web browser. Simply follow these steps to get started:

Open your preferred web browser (Google Chrome, Firefox, Safari, or Edge).

Enter the system's URL provided <https://9f1e7c76ece206c6.ngrok.app> Log in or sign up with your credentials.

## How to Use the System

### Dashboard Overview

Upon logging in, you will be directed to the dashboard displaying key information and navigation options.

### Adding a New Client Record

To add a new client record, follow these steps:

Navigate to the “Onboard" section or tab. Choose to use social details to extract client info or add the details manually.

Choosing to use social details -> Copy the generated link and send it to the client/customer.

Upon consent of data retrieval, the user should reload the page and add the client.

Choosing to manually input -> Fill out the required fields (e.g., client name, contact information).

Click “add client” to add the record to the database.

## Updating Client Information

To update an existing client's information:

From the dashboard choose to manage client.

Click on the client's info from the dropdown.

Click "Edit" then "Update" to modify the client's information.

## Deleting Client Information

To delete an existing client's information:

From the dashboard choose to manage client. Choose a client from the dropdown.

Click "delete” to delete the client record.

## Searching for Specific Clients

Use the search feature to locate specific client addresses:

Enter keywords to search for into the search bar.

View the search results displaying matching client records.

Choose to copy all data to extract all related client data.

## Prerequisite

1. To Access the website (I must have an open tunnel) and (Open server connection)
2. To use social details to add a client you must have a google console account!