CDMS User manual

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first steps:

When the CDMS is started pres '1' to login. Now simply select your role in the CDMS and log in with your username and password. When logged in the user can based on their role do the actions listed below.

See clients (1)
With this command the user can see all information of all clients in the system.

Check Client (2)
With this command you can check any personal information about a client. When this command is selected you have to provide the firstname and lastname of the client.

Add Client (3)
With this command you can add a new client to the system. The user has to provide the following:
- first name
- last name
- streetname
- house number
- zipcode (first 4 are numbers followed by 2 numbers)
- email address
- phone number (excluding national code)

For selecting the city the user has to provide the number related to the city the user lives in.

Modify Client (4)
With this command you can modify personal information about a client. When this command is selected you have to provide the firstname and lastname of the client.

Delete Client (5)
With this command you can delete a client. When this command is selected you have to provide the firstname and lastname of the client.

Add advisor (6)
With this command you can add a new advisor to the system. The user has to provide the following:
- first name *
- last name
- username
- password**

* username needs between 5-20 characters and the first letter needs to be capitalized.
** password needs between 8-30 characters and must have at least one lowercase letter, one digit and one special character

Modify Advisor (7)
With this command you can modify personal information about a Advisor. When this command is selected you have to provide the firstname and lastname of the Advisor.

Delete Advisor (8)
With this command you can delete a Advisor. When this command is selected you have to provide the firstname and lastname of the Advisor.

Add System Administrator (9)
With this command you can add a new System Administrator to the system. The user has to provide the following:
- first name
- last name
- streetname
- house number
- zip code (first 4 are numbers followed by 2 numbers)
- email address
- phone number (excluding national code)

For selecting the city the user has to provide the number related to the city the user lives in.

Change system administrator password (10)
with this command you can choose to update the passwords of the superadmin, system Administrator or advisor.

Make backup(11)

With the option to make a system backup the system will always have a plan B. Just simply choose the corresponding number and the backup will be made.

See logs (12)
With this option the user can see all activities by the system. Simply provide the number corresponding with this action and the logs will show.

Log out (13)
With this option the user can log out of the system so other users can make use of the system.