Website User Manual

Our CRM system is designed for both our clients and our consultants. Our clients are only able to access to the **Registration Form** and they can fill the form at the reception desk. As the admin for this system, you can explore other functions after you login.

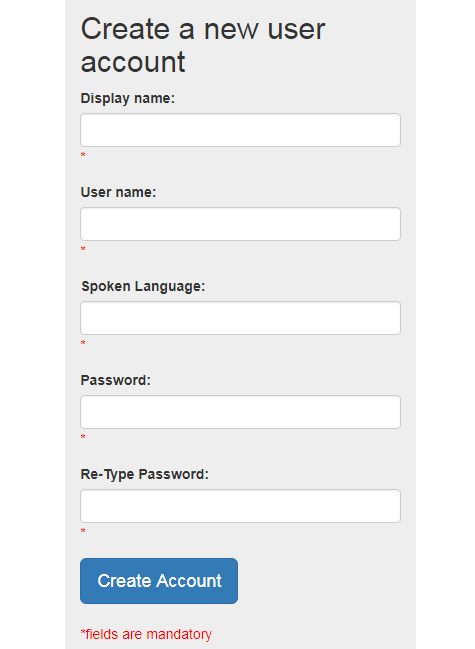
# Login

Username: Admin

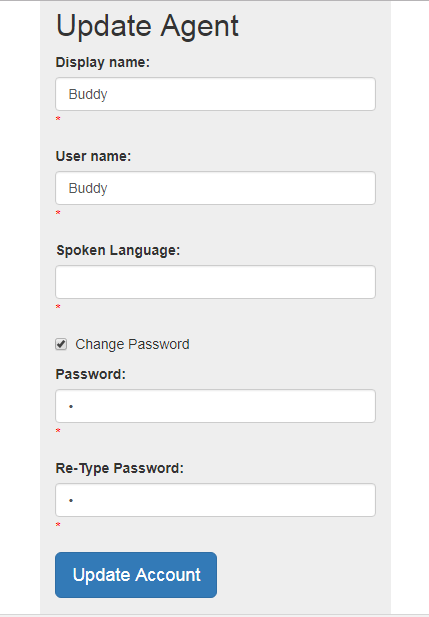
Password: MATUIS01

As the admin, you can **sign up** and **change the password** for our staff.

* Sign Up: Login/Add Agent -> Fill the form(all fields are mandatory) -> Create



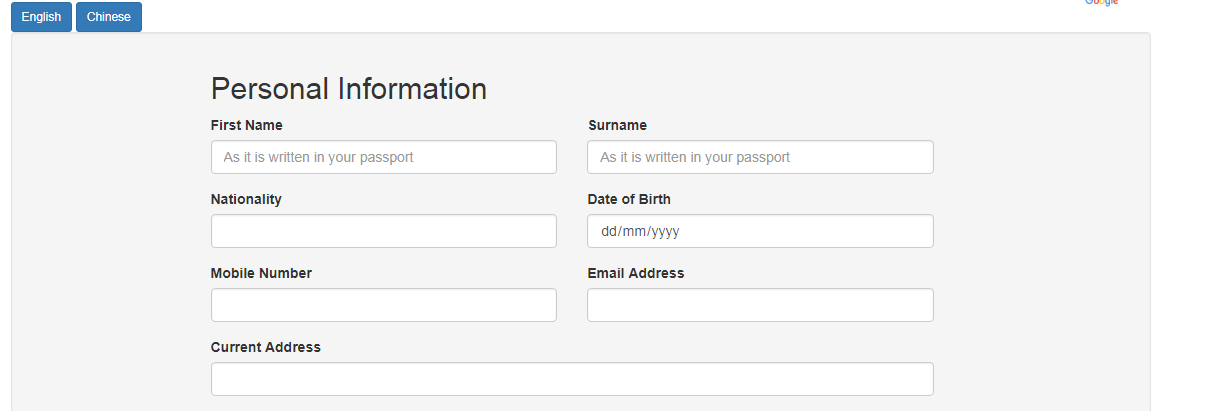
* Change Password: Login/Agents -> Click the agent which you wish to change -> Select the checkbox ‘Change Password’ -> Change the password -> Update Account



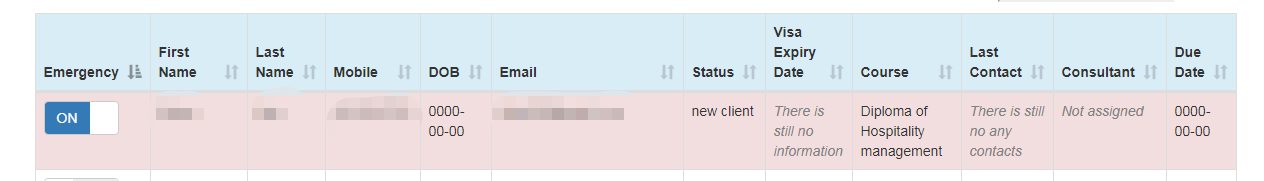
# Interact with Client

With our CRM system, you can add clients and view clients’ information. As the admin, you can view all clients’ information. While, for other consultants, they can only view the information of the clients’ they are helping.

* **Add** client: Login/CLIENTS -> ADD CLIENT

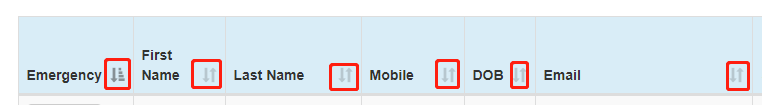


* **View** Clients and Make **Modifications**: Login/CLIENTS -> Click the clients you willing to view/make changes -> Client Information

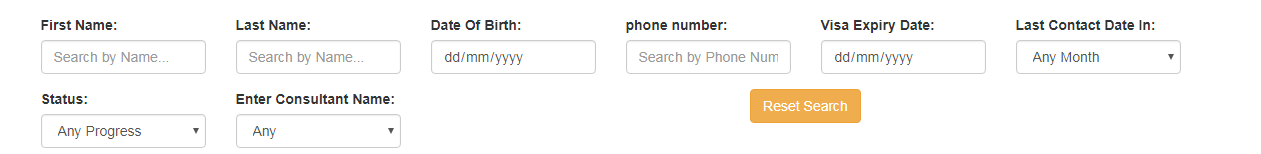


**Tips:**

* Clients who are in ‘**Emergency’** status will be highlight with colour, while others will not.
* As shown in the Figure below, you can **sort** the clients by clicking the arrow in corresponding columns



* **Search** Client: Login/CLIENTS -> Search by First Name/ Last Name/Date of Birth/Phone Number/Visa Expiry Date/Last Contact Date in/Status/Consultant Name (You can reset the search bar by clicking ‘Reset Search’)



* **Print** Client List: Login/CLIENTS -> Print
* **Point Test**: Login/CLIENTS -> Click the client -> Point Test

# Logout

Do not forget to logout every time you leave. Logout button in on the right corner of each page.

