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Introduction

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Grow CRM Documentation

This documentation is also available online

<https://growcrm.io/documentation>

For help, please send us an email, at support@growcrm.io

1. Server Requirements

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Grow CRM has the following minimum server requirements. These requirements can be verified with your web hosting provider. They are typical requirements for running most PHP based applications.

Grow CRM is built using the latest version of the [Laravel framework](#).

Minimum Server Requirements

- PHP >= v7.2.5
- BCMath PHP Extension
- Ctype PHP Extension
- Fileinfo PHP extension
- JSON PHP Extension
- Mbstring PHP Extension
- OpenSSL PHP Extension
- PDO PHP Extension
- Tokenizer PHP Extension
- XML PHP Extension
- MySQL Database
- GD Library >= v2.0

2. Installation

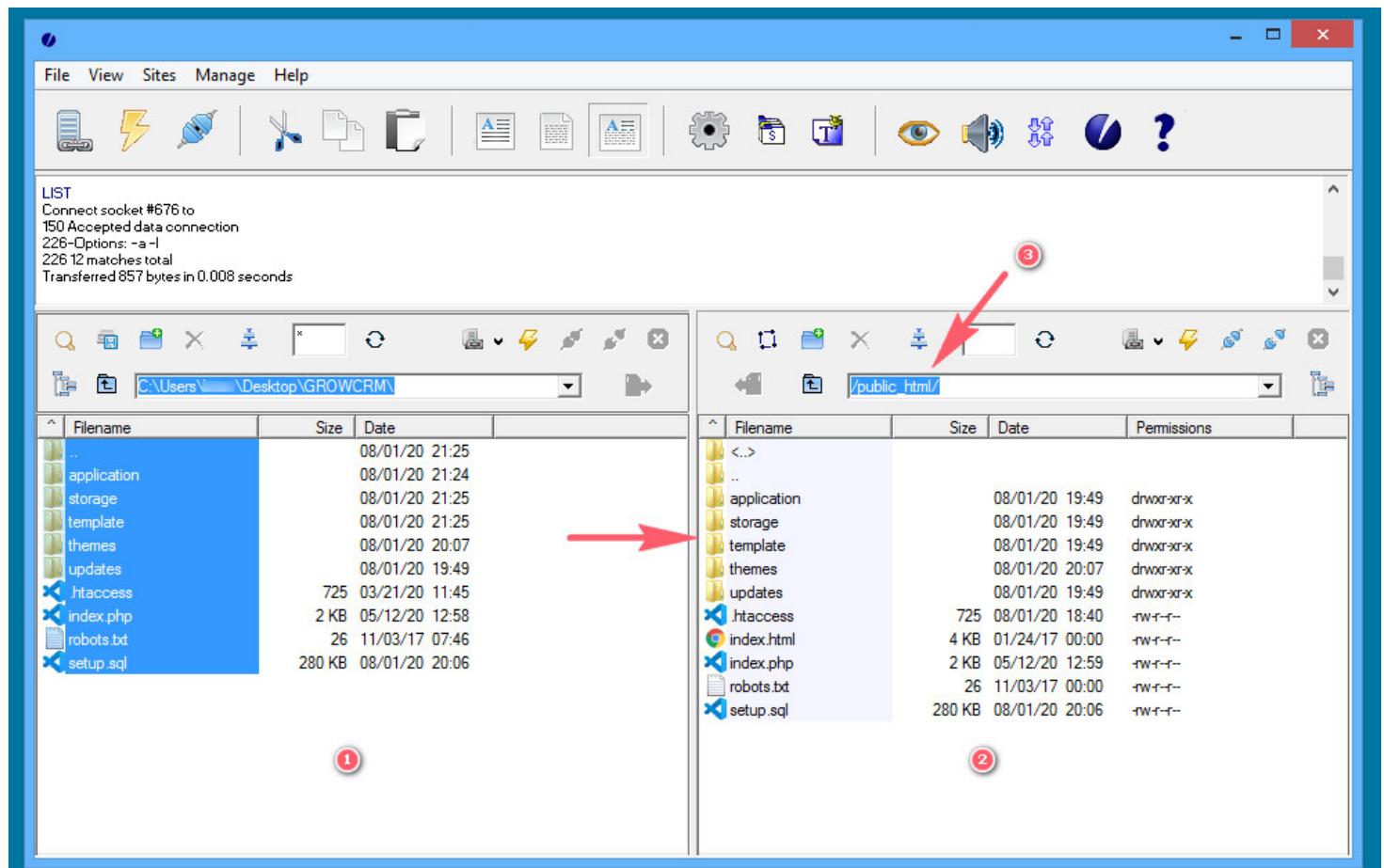
You are here: [Main](#) □ [Getting Started](#) □ [2. Installation](#)

The following instruction will guide you through the installation of Grow CRM. The application comes with an easy to use installation wizard, which will guide you step by step, through the installation process.

Please ensure that you have first read the [Server Requirements](#)

UPLOADING TO YOUR SERVER

1. Start by download the package zip file from your Codecanyon dashboard.
2. Once you have downloaded it, you must unzip the folder
3. You must then upload the contents of the unzipped folder, onto your server, using an FTP Client, such as [Core FTP](#).



The image above shows a typical connection to your web site's server. For detailed instructions on how to connect via FTP, please see your web hosting providers' documentation.

- (1) This is your local computer. In this case, the unzipped Grown CRM folder is on the desktop
 - (2) & (3) You will drag and drop all the contents of this folder, into your server (usually into a folder called public_html)
-

NGINX SERVER

If your server is running Nginx, you will need to follow additional instructions. Please see the section titled [Nginx Server Instructions](#).

Note: These instructions do not apply if your web hosting is based on the standard Apache server (e.g. Cpanel, Plesk, DirectAdmin etc)

FOLDER & FILE PERMISSIONS

The following folders must be writable

If you do not set writable permissions as show below, you will get a 504 Gateway Time Out error.

You can set writable permissions via FTP or via SSH

Depending on how your web server is setup, you can try setting permissions as follows. Try the lowest level first, if it does not work, try the next permission level.

- 0755
- 0770
- 0777

THESE FOLDER MUST BE WRITABLE

/updates
/storage

```
/storage/avatars  
/storage/logos  
/storage/logos/clients  
/storage/logos/app  
/storage/files  
/storage/temp  
/application/storage  
/application/storage/cache  
/application/storage/cache/data  
/application/storage/debugbar  
/application/storage/logs  
/application/storage/temp  
/application/storage/app  
/application/storage/app/public  
/application/storage/framework  
/application/storage/framework/cache  
/application/storage/framework/cache/data  
/application/storage/framework/sessions  
/application/storage/framework/testing  
/application/storage/framework/views  
/application/bootstrap/cache  
/application/storage/app/purifier  
/application/storage/app/purifier/HTML
```

THESE FILES MUST BE WRITABLE

```
/application/.env
```

SETUP WIZARD – WELCOME

Once you have finished uploading your files, open your browser to the URL of your website. You will be presented with the setup wizard, as shown below. This is the first page of the setup wizard.

1

Welcome

2

Requirements

3

Database

4

Settings

5

Admin User

6

Finish



Installation

This wizard will guide you through the installation process. For help, please refer to our documentation.

[Start Installation](#)

Click on the Start Installation button, to continue.

SETUP WIZARD – REQUIREMENTS

This next step of the installation wizard checks if your web hosting server meets all the [Server Requirements](#). If any item is marked with a cross, you will need to contact your web hosting provider for assistance. You can send them a screenshot of this page.

1

Welcome

2

Requirements

3

Database

4

Settings

5

Admin User

6

Finish

Server - PHP Requirements

PHP >= 7.2.5	
MySQL Database (mysql)	
BCMath PHP Extension	
Ctype PHP Extension	
JSON PHP Extension	
Mbstring PHP Extension	
OpenSSL PHP Extension	

PDO PHP Extension	✓
Tokenizer PHP Extension	✓
XML PHP Extension	✓
FILEINFO PHP Extension	✓
GD Graphics Library (PHP GD)	✓

Folders - Writable Permission

/updates	✓
/storage	✓
/storage/avatars	✓
/storage/logos	✓
/storage/logos/clients	✓
/storage/logos/app	✓
/storage/files	✓
/storage/temp	✓
/application/storage/app	✓
/application/storage/app/public	✓
/application/storage/cache	✓
/application/storage/cache/data	✓
/application/storage/logs	✓
/application/storage/framework	✓
/application/storage/framework/cache	✓
/application/storage/framework/cache/data	✓
/application/storage/framework/sessions	✓
/application/storage/framework/testing	✓
/application/storage/framework/views	✓
/application/bootstrap/cache	✓

Files - Writable Permission

/application/env (file)	✓
-------------------------	---

[Continue](#)

You can set folder permissions via FTP or via SSH. Depending on your server's setup, the permission levels can be one of the ones shown below (always try the lowest permission level first)

- 0755
- 0770
- 0777

If everything checks out ok, click on the continue button.

SETUP WIZARD – DATABASE

This next step will require you to have your database information ready. Most web hosting providers control panels, have a section that allows you to do the following.

- Create a new MySQL database.
- Create a new database user.
- Add the database user to the database.
- Grant full permissions to the database user, on the database.

GROW CRM - SETUP

1 Welcome 2 Requirements 3 Database 4 Settings 5 Admin User 6 Finish

MySQL Database Setup

Database Server	① localhost
Server Port	② 3306
Database Name	③
Database Username	④
Database Password	⑤

Continue

The screen above, shows the database form, for you to enter your MySQL database details.

- (1) Database Server
 - This is usually just localhost, unless if your web hosting provider has told you otherwise.
- (2) Server Port
 - This is usually 3306, unless if your web hosting provider has told you otherwise.
- (3), (4) & (5) Database Details
 - These details have been explained in the section above.

SETUP WIZARD – SETTINGS

GROW CRM - SETUP

1 Welcome 2 Requirements 3 Database 4 Settings 5 Admin User 6 Finish

Admin User Details

Company Name	ABD Inc
Timezone	UTC

Continue

On the screen above, you will need to enter the following information:

- Company Name
 - This is the name that will be displayed throughout the application (e.g. on Invoices)
- Timezone
 - It is usually best to set your timezone to UTC. You can, however, set it to a timezone that best suits you and your customers

SETUP WIZARD – ADMIN USER DETAILS

GROW CRM - SETUP

- 1 Welcome 2 Requirements 3 Database 4 Settings 5 Admin User 6 Finish

Admin User Details

First Name

Last Name

Email Address

Password

Continue

On this screen, you can now enter your details (as the admin). Click continue.

SETUP WIZARD – FINISH SETUP

1 Welcome

2 Requirements

3 Database

4 Settings

5 Admin User

6 Finish



Congratulations!!

Your setup is now complete. You can now start using your application.

⚠ One Last Step!



You must now setup a **CronJob**. This is usually done inside your web hosting provider's control panel (**e.g. Cpanel**). See documentation for detailed instructions.

CronJob

```
php /home/nginx.growcrm.io/application/artisan schedule:run 1>> /dev/null 2>&1
```

[Go To My Dashboard](#)

You will now be able to login the dashboard as an admin user and you can start creating your client accounts and your users accounts.

Please note, the dashboard url's are the same for all users (team & client)

Example: <http://www.yourdomain.com/login>

3. Nginx Server Instructions

You are here: [Main](#) □ [Getting Started](#) □ [3. Nginx Server Instructions](#)

Important: These instructions do not apply if you are using standard Apache-based web hosting (i.e. Cpanel, Plesk, Direct Admin, LAMP, etc).

Grown CRM is built on the Laravel framework and in order to install it on an Nginx web server, you will need to make these changes on your server.

Edit Virtual Host Config File

You will need to edit the nginx config file for your website. This is typically found in the /etc/nginx/conf.d directory. You add the following code, which will direct all requests on your website to index.php

```
location / {  
    try_files $uri $uri/ /index.php?$query_string;  
}
```

You must then restart your Nginx webserver

```
systemctl restart nginx
```

Set Folder Permissions

The following folders must be writable

If you do not set writable permissions as show below, you will get a 504 Gateway Time Out error.

You can set writable permissions via FTP or via SSH

Depending on how your web server is setup, you can try setting permissions as follows. Try the lowest level first, if it does not work, try the next permission level.

- 0755
- 0770
- 0777

THESE FOLDER MUST BE WRITABLE

```
/updates
/storage
/storage/avatars
/storage/logos
/storage/logos/clients
/storage/logos/app
/sorage/files
/storage/temp
/application/storage
/application/storage/cache
/application/storage/cache/data
/application/storage/debugbar
/application/storage/logs
/application/storage/temp
/application/storage/app
/application/storage/app/public
/application/storage/framework
/application/storage/framework/cache
/application/storage/framework/cache/data
/application/storage/framework/sessions
/application/storage/framework/testing
/application/storage/framework/views
/application/bootstrap/cache
/application/storage/app/purifier
/application/storage/app/purifier/HTML
```

THESE FILES MUST BE WRITABLE

/application/.env

You can also get more information on Laravel and Nginx [here](#).

You will now be able to continue with the rest of the [Installation Instructions](#)

4. Common Installation Errors

You are here: [Main](#) □ [Getting Started](#) □ [4. Common Installation Errors](#)

Installing Grow CRM is normally quick and without any errors. However, below are some errors that you may encounter during installation.

These errors are normally caused by a server that does not meet the [minimum server requirements](#).

Blank white page

If you are getting a blank white page, be it during setup or when using the application, it means that the application has encountered an error, however, your web hosting server is not set to display the error(s) on the screen. You can instead take a look at the [error logs](#), to identify the error.

A system error occurred whilst trying to process this request

If you get this error when you are just starting the installation process, clear your browser cache and then try again.

Request Could Not Be Completed

If you get a popup that says that the request could not be completed, it usually means that an error was encountered when processing your request/action. Please download the [error logs](#) to see more details about the actual error.

500 Server Error

If you are getting a 500 Server Error message, please check the [error logs](#) to get details about the error.

504 Gateway Timeout Error

This error usually indicates that the application is failing to write files to certain folders. You must set writeable permissions of the following files and folders. You can do this via your FTP client (right-click the folder and select 'permissions') or via SSH, using the **chmod 0777** command.

NOTE:

Some require permissions to be set to 0755 and not 0777. Typically you will know because you will get a 500 Server Error.

CHMOD THESE FOLDER - 0777

```
/updates
/storage
/storage/avatars
/storage/logos
/storage/logos/clients
/storage/logos/app
/storage/files
/storage/temp
/application/storage
/application/storage/app
/application/storage/cache
/application/storage/debugbar
/application/storage/framework
/application/storage/logs
/application/storage/tinx
/application/bootstrap/cache
```

CHMOD THESE FILES TO - 0777

```
/application/.env
```


5. Installing Updates

You are here: [Main](#) □ [Getting Started](#) □ [5. Installing Updates](#)

This documentation will guide you on how to download the latest updates for your application and how to install them.

Download Updates

To check for new updates, go to the settings section of your app, as shown below.

The screenshot shows the app's navigation bar at the top with icons for Exit Settings, Notifications, Settings, Profile, and Global. On the left is a sidebar with links: Leads, Milestones, Tasks, Sales, Tags, Payment Methods, Email, User Roles, Tickets, Knowledgebase, Other (with a dropdown menu for Updates), and Updates (which is currently selected). The main content area is titled "Settings" and shows the path "APP > SETTINGS > UPDATES". It features a central illustration of a person standing next to a smartphone displaying a downward arrow, with clouds floating around. Below the illustration, the text "New updates available" is displayed, followed by "Your App Version: v1.0 ----- New Version: v1.01". A red button labeled "Download updates" is prominent, and a blue button labeled "How to install updates" is also present.

1. Clients Overview

You are here: [Main](#) □ [Clients](#) □ [1. Clients Overview](#)

Managing your clients is very easy and intuitive. The place to start is the Client List Page.

You access this page via the main menu:

:: Main Menu > Customers > Clients

The screenshot shows a client management interface titled 'Clients'. At the top right are five numbered circular icons: 1 (Create), 2 (Edit), 3 (Delete), 4 (Filter), and 5 (Search). The main area is a table with columns: ID, Company Name, Account Owner, Projects, Invoices, Tags, Category, Status, and Action. Each row represents a client with a unique ID, company name, account owner (with a profile picture), number of projects, total invoice value, tags, category, status (Active), and a row of three icons for edit, delete, and more options. The table has 7 rows of data.

ID	Company Name	Account Owner	Projects	Invoices	Tags	Category	Status	Action
2	Amada Inc.	Mike	2	\$1,069.27	---	Default	Active	
20	Bella Bags Inc	Judith	0	\$0.00	---	Default	Active	
3	BrentWood Products In	Jane	1	\$0.00	---	Default	Active	
4	Careview Inc	Amanda	1	\$0.00	---	Default	Active	
1	Dellon Software Inc	Angela	3	\$0.00	---	Default	Active	
5	Demnol Inc	Sarah	1	\$0.00	---	Default	Active	
6	EverBright Inc	Ken	1	\$0.00	---	Default	Active	

From this page, you are able to view and do the following:

- (1) Create a new client account
- (2) Edit an existing client account
- (3) Delete a client account
- (4) Filter clients, using a detailed filter panel.
- (5) Search your projects, using the free text search box.
- See the most important summary information about your clients:
 - The client's ID
 - The client's company name
 - The main contact/account owner for the client account
 - The number of projects the client has
 - The total value of invoices raised with the client
 - Tags, which are useful for quickly identifying key attributes about your client
 - Client category, which is helpful for classifying your clients (e.g. Design Clients, SEO Clients, etc)

2. Create, Edit & Delete Client Accounts

You are here: [Main](#) □ [Clients](#) □ [2. Create, Edit & Delete Client Accounts](#)

Grow allows you to easily manage your clients/customers. You are able to create new client accounts, which will have their own access to a client dashboard.

Create A Client Account

You can create a new client account by clicking on the Quick Add icon or by clicking on the action_column.



The screenshot shows the 'Clients' section of the Grow app. At the top right, there are icons for notifications, a clipboard, a quick add (+), and a user profile for Brian. Below is a search bar with a magnifying glass icon and a 'Clients' button. The main area is a table with columns: ID, Company Name, Account Owner, Projects, Invoices, Tags, Category, Status, and Action. One row is visible for 'Amada Inc.' with details: ID 2, Account Owner Mike, 2 Projects, \$1,069.27 Invoices, Default Category, Active Status, and edit/delete icons. A red arrow points from the text above to the 'Quick Add' icon (+) at the top right of the table header.

ID	Company Name	Account Owner	Projects	Invoices	Tags	Category	Status	Action
2	Amada Inc.	Mike	2	\$1,069.27	---	Default	Active	

1. Required/Mandatory information

- Company name
 - If your client does not have a Company, you can use their name as a “company” name.
- First name
- Last name
- Email address

2. Optional information

- Billing address
- Shipping address
- Other Details
 - Tags – Tags can be used for a variety of reasons, such as identifying unique aspects of your clients.

Editing A Client Account

To edit your client account, click on the Edit Client Icon, as shown in the image below:

A screenshot of a web application titled "Clients" under the "APP > CLIENTS" section. The page features a search bar at the top right and a red "+" button. Below is a table with columns: ID, Company Name, Account Owner, Projects, Invoices, Tags, Category, Status, and Action. Two rows are visible: one for "Amada Inc" (Account Owner: Mike) and another for "Bella Bags Inc" (Account Owner: Judith). Each row has an "Edit" icon (pencil) in the Action column.

ID	Company Name	Account Owner	Projects	Invoices	Tags	Category	Status	Action
2	Amada Inc	Mike	2	\$1,069.27	---	Default	Active	
20	Bella Bags Inc	Judith	0	\$0.00	---	Default	Active	

Deleting A Client Account

To edit your client account, click on the Delete Client Icon, as shown in the image below:

A screenshot of the same "Clients" application interface. A red arrow points from the text above to the "Delete" icon (trash can) in the "Action" column for the "Amada Inc" row. The table structure is identical to the previous screenshot.

ID	Company Name	Account Owner	Projects	Invoices	Tags	Category	Status	Action
2	Amada Inc	Mike	2	\$1,069.27	---	Default	Active	
20	Bella Bags Inc	Judith	0	\$0.00	---	Default	Active	

When you delete a client, all the items/resources linked to that client will also be deleted. The list below highlights some of the items that will be deleted.

- Projects
- Client Users
- Invoices
- Tasks
- Files
- Payments
- etc etc

3. Client Management

You are here: [Main](#) □ [Clients](#) □ [3. Client Management](#)

The Client Account section of the dashboard gives you easy access to all the resources linked to a client. From this section, you have access to view and manage items such as:

- Event Timeline – This shows you a historic summary of all the activity around a client account.
- Users – You are able to manage all the users associated with a client account. Including creating, editing, and deleting users.
- Project – You are able to manage all the projects that belong to a client. Including, creating, editing, and deleting projects.
- Files – This section allows you to view all files attached to all the client's projects. You are also able to attach files for the client as a whole. These files are not visible to the client.
- Support Tickets – This section lists all the tickets that are associated with the client. You are also able to easily manage the support tickets from this section. Including, creating, editing, and deleting support tickets.
- Financial – This section includes all the client's financial resources, such as:
 - Invoices
 - Estimates
 - Expenses
 - Timesheets
- Notes – You can create notes relating to your client. These notes are not visible to the client. They are visible to the rest of your team.

Client Name
Amada IncTelephone
032519313937Account Owner
 Mike JoramAccount Status
ActiveInvoices \$12,000Payments \$5,000Completed Projects 2Open Projects 10Address
10 Septa Drive
Rochester
kent
X12 6DT
United Kingdom

Timeline Users Projects Files ▾ Tickets Financial ▾ Notes



Brian Millard 20 hours ago
Completed a task
On [\(Project #18\) - Shopping cart redesign](#)

Research app design ideas



Brian Millard 6 days ago
Completed a task
On [\(Project #18\) - Shopping cart redesign](#)

Research app design ideas



Brian Millard 6 days ago
Uploaded a file
On [\(Project #18\) - Shopping cart redesign](#)

file-sample_100kB.doc



Brian Millard 6 days ago
Uploaded a file
On [\(Project #18\) - Shopping cart redesign](#)

file_example_XLS_100.xls



Brian Millard 6 days ago
Uploaded a file
On [\(Project #18\) - Shopping cart redesign](#)

allegiant-best-free-wordpress-theme.jpg

1. Projects Overview

You are here: Main □ Projects □ 1. Projects Overview

Managing your projects is very easy and intuitive. The place to start is the Project List Page.

You access this page via the main menu:

:: Main Menu > Projects

The screenshot shows the 'Projects' list page. At the top, there's a 'Quick Stats Panel' with four categories: 'All' (17), 'In Progress' (3), 'On Hold' (1), and 'Completed' (0). To the right of the stats are several red circular icons with numbers: 8, 7, 6, 5, 1, a magnifying glass, a person icon, a chart icon, a filter icon, and a plus sign. Below the stats is a table with columns: ID, Title, Client, Start Date, Due Date, Progress, Team, Status, and Action. The table lists seven projects. Each project row has a red numbered callout: (2) over the 'Edit' icon, (3) over the 'Delete' icon, (4) over the 'More' dropdown, (5) over the filter icon, (6) over the search icon, (7) over the user icon, and (8) over the magnifying glass icon. The 'Status' column shows 'Not Started' for most projects, except for one which is 'In Progress'.

ID	Title	Client	Start Date	Due Date	Progress	Team	Status	Action
20	Social Media Marketi...	Jolly Juice...	07-29-2020	---	<div style="width: 0%;"></div>		Not Started	...
19	School management ap...	Dellon Softw...	08-01-2020	01-31-2021	<div style="width: 0%;"></div>		Not Started	...
18	Shopping cart redesi...	Amada Inc.	07-29-2020	---	<div style="width: 0%;"></div>		Not Started	...
14	Search engine optimi...	Linda Seo In...	05-21-2020	06-30-2020	<div style="width: 10%;"></div>		In Progress	...
13	Redesign the label f...	Ketplan Proj...	05-01-2020	08-10-2020	<div style="width: 0%;"></div>		On Hold	...
12	Mobile app that lets...	Jolly Juice...	04-03-2020	10-30-2020	<div style="width: 0%;"></div>		In Progress	...

From this page, you are able to view and do the following:

- (1) Create a new project
- (2) Edit an existing project
- (3) Delete a project
- (4) Quickly manage additional project setting, via the quick actions, drop menu.
- (5) Filter projects, using a detailed filter panel. You can filter by project dates, categories, statuses, etc.
- (6) Toggle (hide/show) the Quick Stats panels
- (7) As the admin user, you can select to view all projects or only the projects that you are assigned to.
- (8) Search your projects, using the free text search box.

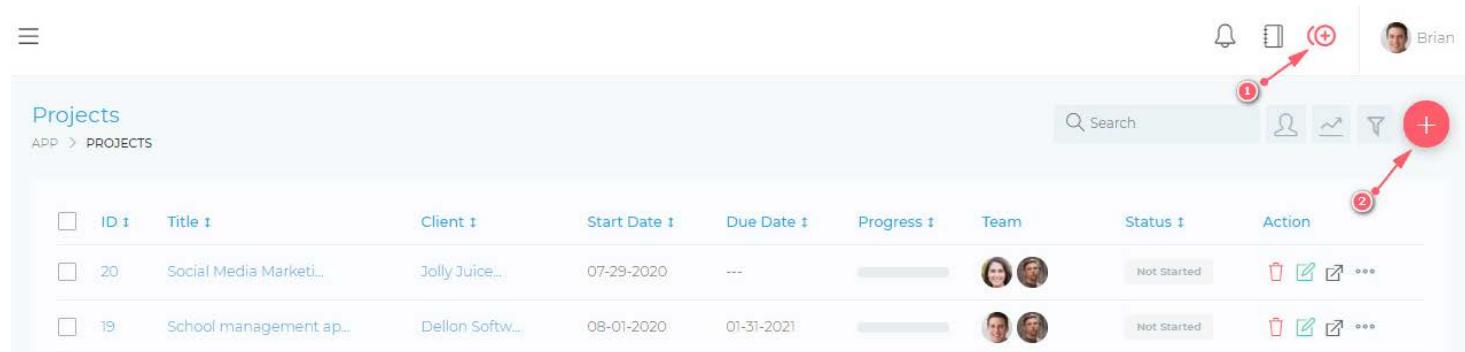
2. Create Projects

You are here: [Main](#) □ [Projects](#) □ [2. Create Projects](#)

Grow CRM allows you to easily manage your projects. You are able to create projects, which you, your team, and your client, are all be able to share information and collaborate.

Creating A Project

You can create a new project by clicking on the (1) Quick Add icon or by clicking on the (2) Add Project Button.



Basic Mandatory information

- Project Title*
- Client*
- Start Date*

Optional information

- Deadline
- Assigned users
- Project Manager
 - This user will have admin-level access to the project. They will be able to edit all the project's information and settings. They will also be able to view all user's tasks, assign users to tasks. The project manager is not able to delete the project.
- Billing information
 - This allows you to specify how the project will be billed. The available options are:
 - Fixed Billing
 - Hourly Billing

- Estimated Hours enable you to monitor your working hours against what you have allowed for.
- Estimated Costs enable you to monitor your expenditure against what you have budgeted for.
- Project Description
- Assigned Users Permissions
 - You are able to specify if team members can collaborate on tasks. This means they will be able to view each other's tasks and also work within the tasks (commenting, attaching files, etc)
- Client Project Permissions
 - You are able to specify the level of access the client will have on the project:
 - View Tasks
 - Tasks Participation
 - The client will be able to comment, attach files, complete checklist, etc, within a task
 - Create Tasks
 - The client will be able to create new tasks for the project
 - View Time Sheets
 - View Expenses
- Project Progress
 - You can set the progress to be calculated automatically (based on the completed tasks) or you can set it to be updated manually (you will be able to set the progress yourself)
- Category
 - You can create categories via the settings dashboard. Categories can be anything that allows you to properly sort your projects (e.g. Design, Urgent, Web Development, etc)
- Tags
 - Tags can be any text that allows you to easily identify or highlight important information about the project.

* Required information

Editing A Project

To edit a project, click on the Edit Icon, as shown in the image below:

	ID	Title	Client	Start Date	Due Date	Progress	Team	Status	Action
<input type="checkbox"/>	20	Social Media Marketi...	Jolly Juice...	07-29-2020	---	<div style="width: 10%;">10%</div>	 	Not Started	   
<input type="checkbox"/>	19	School management ap...	Dellon Softw...	08-01-2020	01-31-2021	<div style="width: 5%;">5%</div>	 	Not Started	   

Deleting A Project

To delete a project, click on the Delete Icon, as shown in the image below:

	ID	Title	Client	Start Date	Due Date	Progress	Team	Status	Action
<input type="checkbox"/>	20	Social Media Marketi...	Jolly Juice...	07-29-2020	---	<div style="width: 10%;">10%</div>	 	Not Started	   
<input type="checkbox"/>	19	School management ap...	Dellon Softw...	08-01-2020	01-31-2021	<div style="width: 5%;">5%</div>	 	Not Started	   

When you delete a project, all the items/resources linked to that project will also be deleted. The list below highlights some of the items that will be deleted.

- Invoices
- Tasks
- Files
- Comments
- etc etc

Addition Editing Options

You can access more options for editing your project, via the more icon, as shown in the image below

	ID	Title	Client	Start Date	Due Date	Progress	Team	Status	Action
<input type="checkbox"/>	20	Social Media Marketi...	Jolly Juice...	07-29-2020	---	<div style="width: 10%;">10%</div>	 	Not Started	   
<input type="checkbox"/>	19	School management ap...	Dellon Softw...	08-01-2020	01-31-2021	<div style="width: 5%;">5%</div>	 	Not Started	   
<input type="checkbox"/>	18	Shopping cart redesi...	Amada Inc	07-29-2020	---	<div style="width: 0%;">0%</div>	 	Not Started	    <div style="background-color: #f0f0f0; padding: 5px; border-radius: 5px;"><p>Change Category</p><p>Change Status</p><p>Stop All Timers</p></div>

3. Project Management

You are here: [Main](#) □ [Projects](#) □ [3. Project Management](#)

The Project Management section of the dashboard gives you easy access to all the resources linked to a project. From this section, you have access to view and manage items such as:

- Overview
 - View the progress of the project
 - View the project members
 - View the dates of the project
 - View the billing structure of the project
 - View a summary of invoices and payments
- Event Timeline
 - This shows you a historic summary of all the activity around a project.
- Tasks
- Files
- Support Tickets
 - This section lists all the tickets that are associated with the client. You are also able to easily manage the support tickets from this section. Including, creating, editing, and deleting support tickets.
- Financial
 - This section includes all the project's financial resources, such as:
 - Invoices
 - Estimates
 - Expenses
 - Timesheets
- Notes – You can create notes relating to the project. These notes are not visible to the client. They are visible to the rest of your team.
- Edit the project
- Delete the project

Shopping cart redesign

APP > PROJECT > #18

[Overview](#)[Details](#)[Tasks](#)[Milestones](#)[Files](#)[Comments](#)[Tickets](#)[Notes](#)[Financial ▾](#)

Progress

Tasks Based Progress

**Amada Inc**

Assigned



Project Manager



Start Date

07-29-2020

Due Date

Category

Web Development

Status

Not Started

Billing Type

Fixed Fee

Rate

\$40.00

Estimated Hours

100 hrs

Time Spent

22 hrs : 54 mins

All Invoices

\$0.00

Paid Invoices

\$0.00

Due Invoice

\$0.00

Overdue Invoices

\$0.00

**Brian Millard** 1 day ago

Completed a task

Research app design ideas

**Brian Millard** 6 days ago

Completed a task

Research app design ideas

**Brian Millard** 6 days ago

Uploaded a file

file-sample_100kB.doc

**Brian Millard** 6 days ago

Uploaded a file

file_example_XLS_100.xls

**Brian Millard** 6 days ago

Uploaded a file

allegiant-best-free-wordpress-theme.jpg

**Brian Millard** 1 week ago

Created a new project

1. Milestones

You are here: [Main](#) □ [Tasks](#) □ [1. Milestones](#)

Grow CRM enables to work efficiently, by breaking down your projects into Milestones & Tasks.

Project Milestones are points along the progress path of your project. Milestones do not have target dates, but rather they focus on specific progress points that must be achieved for a project to be successful.

Name	All Tasks	Pending Tasks	Completed Tasks	Action
Design	0	0	0	(1) Edit (2) Delete (3) Checkmark
Development	0	0	0	Delete (2) Checkmark
Testing	0	0	0	Delete (2) Checkmark
Uncategorised	1	0	1	Delete (2) Checkmark

As the administrator, you can control how project milestones are used inside the dashboard. You do this via the dashboard settings panel

- Create default milestones, which will be applied whenever a new project is created
- Enable/Disable the team member's ability to:
 - (1) Create Milestones
 - (2) Delete Milestones
 - (3) Edit Milestones

When a milestone is deleted, there is an option to delete all its tasks, or the tasks will automatically be moved into the uncategorized milestone.

2. Tasks

You are here: [Main](#) □ [Tasks](#) □ [2. Tasks](#)

Project Tasks allow you to structure your project work, by splitting the work into smaller pieces that you aim to finish by a set deadline. Your team members can work on tasks individually, or for more complex tasks, they can collaborate.

Grow CRM also allows your team to track the amount of time that they are spending on a task, which can then be the basis for billing your clients.

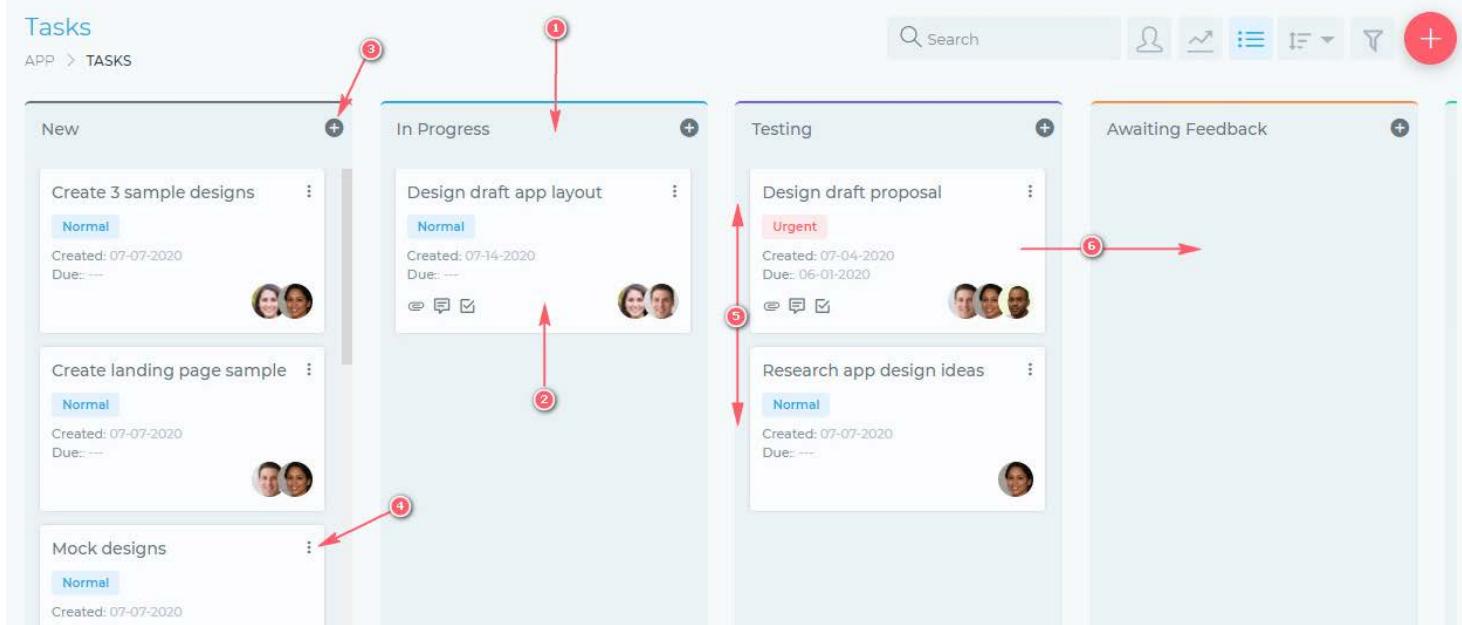


Using the main actions panel (as shown above) you are able to do the following:

- (1) (2) Create a new task.
- (3) Filter tasks.
- (4) Sort tasks (e.g. sort by due date).
- (5) Toggle between list view and kanban board view.
- (6) View quick task statistics, (e.g. open tasks, completed tasks, etc).
- (7) The admin user can select to either view only the tasks that they are assigned to or to view all tasks
- (8) The free text search box, allows you to quickly find specific tasks.

kanban View

The dashboard allows you to view tasks as a list or as cards on a kanban board. You can easily change between these two viewing modes at any time. The dashboard also remembers your viewing preferences, so you do not need to keep changing every time.



The kanban view has the following features:

- (1) Kanban Board
 - The kanban board is a workspace that denotes a task's progress. As you make progress on a task, you can drag it from one board to another. Finally, the tasks will end up on the completed board.
- (2) Task Cards
 - Each task is represented by a card. The face of this card has some basic/summary information about the card. To work on the task, simply click the card and you will get a full view of the card/task.
- (3) Add New Task Button.
- (4) Quick editing button.
- (5) You can change the position of a task by simply dragging it up or down.
- (6) As work progresses on the task, you can move it from one board to the next, by simply dragging and dropping it.

List View

You can also view tasks in a simple table format, as shown below.

Title	Project	Deadline	Assigned	My Time	Status	Action
<input type="checkbox"/> Design draft app layout	Build a tiny budge...	---		01:24	In Progress	
<input checked="" type="checkbox"/> Research app design ideas	Shopping cart rede...	---		22:54	Completed	
<input type="checkbox"/> Research content partners	Search Engine Opti...	---		02:01	New	

From the table list view, you are able to do the following:

- (1) Create a new task.
- (2) Open a task.
- (3) Delete a task.
- (4) Edit a task.
- (5) Start & stop a task timer.
 - You can only do this for tasks that you are assigned to.
- (6) Complete a task.

Most of the actions on a task can only be carried out by users assigned to the task or the project manager.

Working On A Task

When you open a task, you are presented with a view as shown below:

The screenshot shows the detailed view of a task titled "Keyword research".

- Description:** The keywords are:
 - textile pattern - for home page
 - textile design - for category page
 - print pattern - for category page
 - pattern design - for category page
 - textile print - for category page
 - surface pattern design - for category page
 - trending patterns - for category page
- Checklist:** 1/2 items completed.
 - add new words into the layout
 - search for keywords
- Attachments:**
 - Brian Millard [25 seconds ago] mockup-image-7.jpg [Download](#) | [Delete](#)
 - Brian Millard [28 seconds ago] mockup-design-5.jpg [Download](#) | [Delete](#)
 - Brian Millard [28 seconds ago] mockup-image-6.jpg [Download](#) | [Delete](#)
- Comments:**
 - Post a comment...
 - Brian Millard 1 second ago | [Delete](#)
How do the images look?
- Assigned Users:** Brian Millard, John Doe, Jane Smith
- My Timer:** 02:01
- Settings:**
 - Start Date: 07-01-2020
 - Due Date: 07-30-2020
 - Status: New
 - Priority: Low
 - Client: Visible
- Actions:**
 - Change Milestone
 - Stop All Timers
 - Delete
- Information:**

Task ID	#12
Created By	Brian Millard
Date Created	07-12-2020
Total Time	02:01
Time Invoiced	00:00
Project	#2

Grow CRM makes working on your tasks very easy and intuitive. You are presented with a clean, user-friendly working space, where you are able to do the following:

- (1) Edit the task title
- (2) Edit the task description
- (3) Create and complete checklists
- (4) Attach files to the task
- (5) Comment and collaborate with team members (and when enabled, your client too)
- (6) Assign different team members to a task
- (7) Track your time using the task timer
- (8) Update various task settings, including setting the appropriate priority for the task
- (9) Update various other task settings
- (10) A summary view of key task details/attributes

3. Time Tracking

You are here: Main □ Tasks □ 3. Time Tracking

The time tracking feature of Grow CRM enables you and your team to keep track of the amount of time that you spend working on your projects.

It works by providing you with a timer, which you can start and stop, as you work on project tasks.

Time tracking is a feature that is linked to tasks. You have to create some tasks under your projects, in order for you to track the time you spend working on them.

Getting Started

When you are viewing tasks that you are assigned to, you will notice that they will have a timer icon, as shown below (1).

Tasks						
Title		Project	Deadline	Assigned	My Time	Status
Title		Project	Deadline	Assigned	My Time	Action
<input type="checkbox"/>	Design draft app layout	Build a tiny budget app	---		01:24 	(1) In Progress
<input checked="" type="checkbox"/>	Research app design ideas	Shopping cart redesign	---		22:54 	(2) Completed
<input type="checkbox"/>	Keyword research	Search Engine Optimization	07-30-2020		02:01 	(3) New
<input type="checkbox"/>	Backlinks building	Search Engine Optimization	---		00:08 	New

The image above is illustrating the following:

- (1) You are assigned to this task, but the timer is currently not running. When you start working on this task, you can click the start/play icon, and the timer will start recording.
- (2) This is a task that has been marked as completed. The timer can no longer be started on this task.
- (3) This is a task that you are currently working on and the timer is running. You can stop this timer by simply clicking the stop icon.

You are also able to start and stop a timer from inside the task window, as shown below.

Keyword research

Milestone: Uncategorized

Description

The keywords are:

- textile pattern - for home page
- textile design - for category page
- print pattern - for category page
- pattern design - for category page
- textile print - for category page
- surface pattern design - for category page
- trending patterns - for category page

[Edit Description](#)

Assigned Users



My Timer

02 09

Settings

Start Date: 07-01-2020

Due Date: 07-30-2020

Status: New

Priority: Low

Client: Visible

Actions

Change Milestone

Stop All Timers

Delete

Information

Task ID	#12
Created By	Brian Millard
Date Created	07-12-2020
Total Time	02:01
Time Invoiced	00:00
Project	#2

Checklist

1/2

- add new words into the layout
 search for keywords

[Add New Item](#)

Attachments



Brian Millard [2 days ago]
mockup-image-7.jpg
[Download](#) [Delete](#)



Brian Millard [2 days ago]
mockup-design-5.jpg
[Download](#) [Delete](#)



Brian Millard [2 days ago]
mockup-image-6.jpg
[Download](#) [Delete](#)

[Add attachment](#)

Comments

Post a comment...



Brian Millard

How do the images look?

2 days ago | [Delete](#)

ups

ups

ups

Time Sheets

Timesheets are a record of all the time that you have spent working on project tasks.

To view your timesheets, you click on your profile avatar and select My Timesheets.

For the admin user, you are also able to view all users timesheets (App > Other > Timesheets)

User	Task	Project	Date	Invoiced	Time	Action
Brian	Create content plan	Search Engine Optimization	07-21-2020	Not Invoiced	00:16:09	
Brian	Design the log in page	Build a tiny budgeting app that works for mob...	07-20-2020	Not Invoiced	13:10:39	
Brian	Create content plan	Search Engine Optimization	07-15-2020	Not Invoiced	00:12:48	
Brian	Design draft app layout	Build a tiny budgeting app that works for mob...	07-14-2020	Not Invoiced	01:24:56	
Brian	Keyword research	Search Engine Optimization	07-12-2020	Invoiced	25:53:19	

The image above illustrates the following:

- (1) A record of time spent on a task, on a given date. The time has not been invoiced to the customer. You are able to delete this time record.
- (2) A record of time spent on a task, which has since been invoiced to the customer. You are not able to delete this timer. You can however view the invoice that it was billed to. If the invoice is deleted, you will then be able to delete this time record or to bill it to another invoice.
- (3) The filter feature helps you to find specific time records. You are also able to group time records, per task or per user, for a broader view.

Invoicing Time Spent

You are able to bill time records from the invoice page. [Click here](#) for more information.

1. Leads Overview

You are here: [Main](#) □ [Leads](#) □ [1. Leads Overview](#)

Leads are your business opportunities. They are the contact information of people or organizations that have expressed an interest in your company's product offering. Your organization can then use further marketing and promotional tools to convert those potential customers into paying customers.

Grow CRM allows your team to properly keep track of all information and conversations, whilst nurturing the lead into a customer.

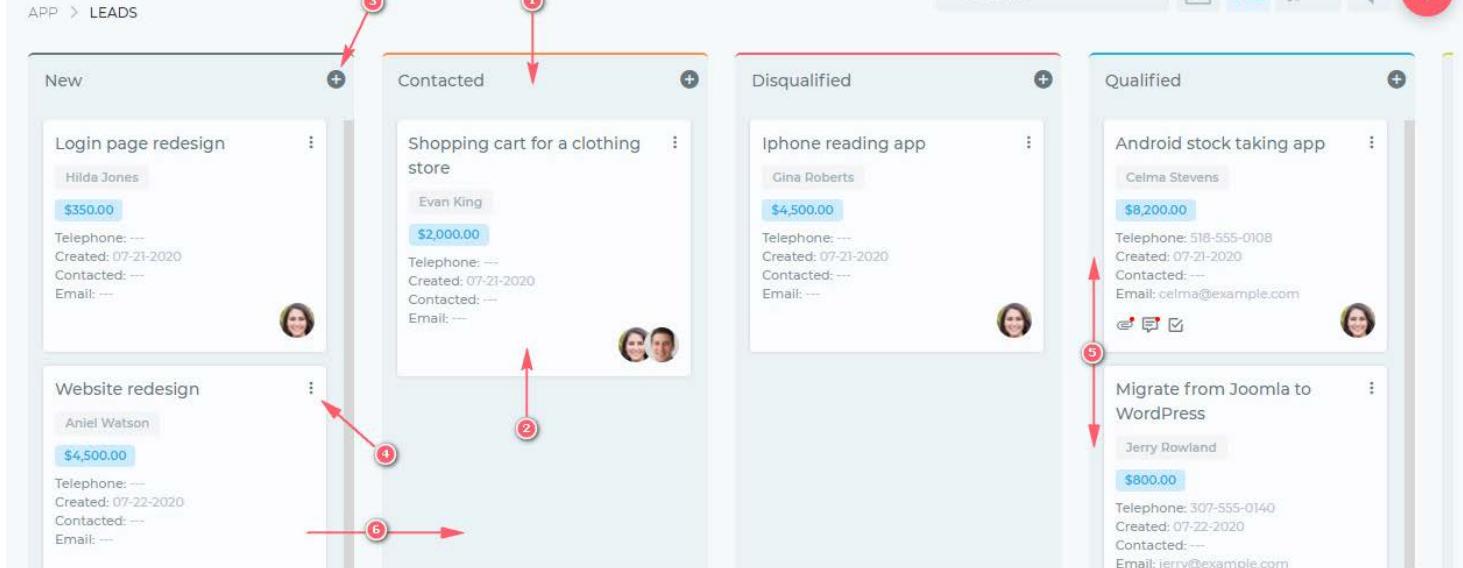


Using the main actions panel (as shown above) you are able to do the following:

- (1) (2) Create a new lead.
- (4) Filter leads.
- (5) Sort leads (e.g. sort by due date).
- (6) Toggle between list view and kanban board view.
- (7) The admin user can select to either view only the leads that they are assigned to or to view all leads.
- (8) The free text search box, allows you to quickly find specific leads.

kanban View

The dashboard allows you to view leads as a list or as cards on a kanban board. You can easily change between these two viewing modes at any time. The dashboard also remembers your viewing preferences, so you do not need to keep changing every time.



The kanban view has the following features:

- (1) Kanban board
 - The kanban board is a workspace that denotes a lead's progress. As you make progress on a lead, you can drag it from one board to another.
- (2) Lead cards
 - Each lead is represented by a card. The face of this card has some basic/summary information about the lead. To work on the lead, simply click the card and you will get a full view of the lead.
- (3) Add new lead button
- (4) Quick editing button.
- (5) You can change the position of a lead by simply dragging it up or down.
- (6) As work progresses on the lead, you can move it from one board to the next, by simply dragging and dropping it.

List View

You can also view leads in a simple table format, as shown below.

Title	Contact	Date	Category	Assigned	Status	Value	Action
<input type="checkbox"/> Migrate from Joomla to Wo...	Jerry Rowland	07-22-2020	Default	---	Qualified	\$800.00	... (1)
<input type="checkbox"/> Website redesign	Aniel Watson	07-22-2020	Default	---	New	\$4,500.00	... (2)
<input type="checkbox"/> Android stock taking app	Celma Stevens	07-21-2020	Default		Qualified	\$8,200.00	... (3)
<input type="checkbox"/> Iphone reading app	Gina Roberts	07-21-2020	Default		Disqualified	\$4,500.00	... (4)
<input type="checkbox"/> Login page redesign	Hilda Jones	07-21-2020	Default		New	\$350.00	...

From the table list view, you are able to do the following:

- (1) Create a new lead.
- (2) Open a lead.
- (3) Delete a lead.
- (4) Edit a lead.

Most of the actions on a lead can only be carried out by users assigned to the lead.

Working On A Lead

When you open a lead, you are presented with a view as shown below:

Migrate from Joomla to WordPress (1)

Description

The customer has an existing Joomla website. They want to migrate all content to a WordPress website.

[Edit Description](#)

(2)

Checklist

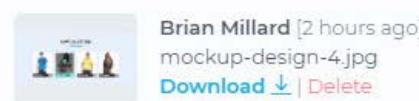
2/2

- Follow up with customer about the quotation
- Email customer quotation

[Add a new item](#)

(4)

Attachments



[Add attachment](#)

(5)

Comments

[Post a comment...](#)

(6)

Assigned Users



(3)

Details

Jerry Rowland

Value: \$800.00

Status: Qualified

Added: 07-22-2020

Category: Default

Contacted: ---

Telephone: 307-555-0140

Email: jerry@example.com

Source: ---

Actions

[Convert To Customer](#)

[Delete](#)

Information

Lead ID	#10
Created By	Brian Millard
Date Created	07-22-2020

Organisation



Grow CRM makes working on your leads very easy and intuitive. You are presented with a clean, user-friendly working space, where you are able to do the following:

- (1) Edit the lead title.
- (2) Edit the lead description.
- (3) Assign different team members to the lead.
- (4) Create and complete checklists.
- (5) Attach files to the lead.
- (6) Comment and collaborate with team members.
- (7) Convert a lead to a customer
- (8) A summary view of key lead details/attributes

1. Estimates Overview

You are here: Main □ Estimates □ 1. Estimates Overview

Clients are reluctant to commission a project when the cost is unknown. This is where cost estimates can help you generate more work. Estimates help the client to understand what sort of budget is required for the work that they want to be undertaken.

Grow CRM enables you to create estimates, which you can use to better convert your leads into customers.

The best place to start is the Estimates page.

:: Main Menu > Sales > Estimates

The screenshot shows the 'Estimates' page in Grow CRM. At the top, there's a 'Quick Stats' section with four categories: Pending (\$8,445.00), Accepted (\$0.00), Expired (\$0.00), and Declined (\$0.00). A red arrow points from the text '(1) Create a new estimate' to the 'New' button in the Pending row. Below the stats is a search bar and filter icons. The main area displays a table of estimates with columns for ID, Company Name, Created By, Date, Expires, Tags, Amount, Status, and Action. Each estimate row has a red number (5, 6, 7, 8) in its action column, corresponding to numbered steps in the list below. The estimates listed are: EST-000004 (BrentWood Products Inc, New), EST-000003 (EverBright Inc, New), and EST-000002 (Careview Inc, Draft).

ID	Company Name	Created By	Date	Expires	Tags	Amount	Status	Action
EST-000004	BrentWood Products Inc	Brian	07-01-2020	10-31-2020	---	\$3,982.50	New	(5)
EST-000003	EverBright Inc	Brian	07-01-2020	07-31-2020	---	\$4,462.50	New	(6)
EST-000002	Careview Inc	Brian	07-01-2020	07-31-2020	---	\$6,600.00	Draft	(7)

From this page, you are able to view and do the following:

- (1) Create a new estimate
- (2) Filter estimates, using a detailed filter panel. You can filter estimates by dates, categories, statuses, etc.
- (3) Toggle (hide/show) the Quick Stats panels
- (4) Search your estimates, using the free text search box.
- (5) Delete an estimate
- (6) Edit an estimate
- (7) View an estimate
- (8) Additional estimate management settings, via the quick actions button.

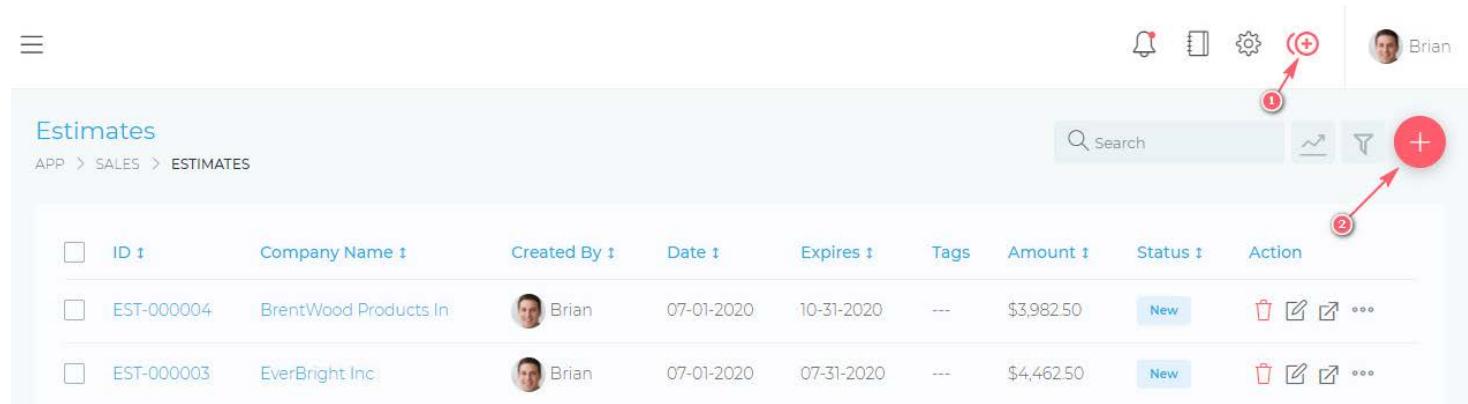
2. Creating Estimates

You are here: [Main](#) □ [Estimates](#) □ [2. Creating Estimates](#)

Grow CRM allows you to easily manage your estimates. The next sections will explain how to create and manage your estimates.

Creating An Estimate

You can create a new estimate by clicking on the (1) Quick Add Icon or by clicking on the (2) Add Estimate Button.



The screenshot shows the 'Estimates' list page in Grow CRM. At the top right, there is a toolbar with icons for notifications, filters, settings, and user profile (Brian). Below the toolbar is a search bar labeled 'Search'. To the right of the search bar are three buttons: a magnifying glass for search, a downward arrow for filters, and a large red button with a white plus sign. Red circles with numbers 1 and 2 are overlaid on the top-right and bottom-right buttons respectively, pointing to them. The main table lists three estimates with columns for ID, Company Name, Created By, Date, Expires, Tags, Amount, Status, and Action. Each row has a checkbox in the first column and a set of action buttons in the last column.

ID	Company Name	Created By	Date	Expires	Tags	Amount	Status	Action
EST-000004	BrentWood Products Inc.	Brian	07-01-2020	10-31-2020	---	\$3,982.50	New	trash edit copy more
EST-000003	EverBright Inc.	Brian	07-01-2020	07-31-2020	---	\$4,462.50	New	trash edit copy more

Basic information

- Client *
- Project
- Estimate Date *
- Expiry Date
- Category *

Additional information

- Tags
 - Tags can be any text that allows you to easily identify or highlight important information about the estimate.
- Notes
 - You can add estimate notes, which are not visible to the client
- Terms & Conditions
 - Default estimate terms are set via the dashboard settings section. You can change these

default terms when you create or edit an estimate.

3. Editing Estimates

You are here: Main □ Estimates □ 3. Editing Estimates

Once you have created an estimate, you will now want to edit it. The section below will show you how to go about doing it.

No attached to a project

APP > SALES > ESTIMATES > EST-000002

① ② ③ ④ ⑤ ⑥

Estimate
#EST-000002

DRAFT

Dashboard Inc

10 Read Road
Rochester
Kent
ZE12 8QT
United Kingdom

Bill To
Careview Inc

10 Septa Drive
Rochester
Kent
X12 6DT
United Kingdom

Estimate Date: 07-01-2020 (6)
Expiry Date: 07-31-2020

Description	Qty	Unit	Rate	Total
WordPress theme design	140	time	40	5600.00
Purchase royalty-free images	40	each	8	320.00
Logo Design	1	Each	350.00	350.00

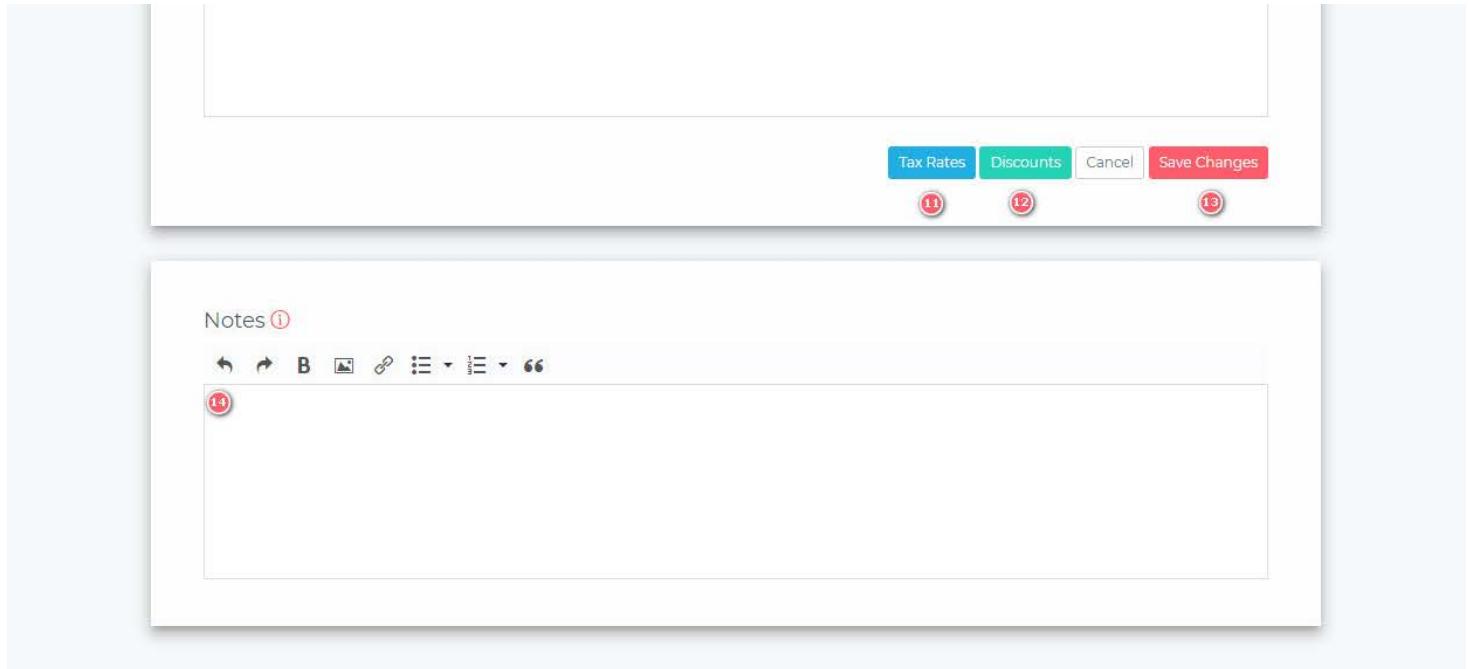
(+) New Blank Line (7) (8) (9)

Subtotal \$6,270.00
Discount (Fixed) \$270.00
Total (Before Tax) \$6,000.00
VAT (10.00%) \$600.00

Invoice Total \$6,600.00

Estimate Terms

(10)



- (1) Edit Estimate
 - To edit an estimate, start by clicking the edit estimate button. This will change the estimate from viewing mode to editing mode (*as shown in the image above*).
- (2) Publish Estimate
 - When you create an estimate, its status is set to *Draft*. A draft estimate is not viewable by the client. Once you have finished editing your estimate, you can publish it. When an estimate is published, an email is automatically sent to the customer, with the estimate attached. The estimate then becomes viewable by the client
- (3) Email Estimate
 - You can use this feature to resend the estimate to the customer. It will be the same email as the one sent when you publish the estimate.
- (4) Download Estimate
 - This button allows you to download the estimate in PDF format.
- (5) Delete Estimate
- (6) Set Estimate Dates
 - This option allows you to set estimate dates.
- (7) Add New Blank Line
 - This will create a new blank line, for you to price/bill.
- (8) Add New Time Line
 - Use this feature if you are specifically billing for time (i.e. hours/minutes).
- (9) Product Item
 - To save you time, you can create a database of items that you commonly bill your clients. You can then use this button to quickly select an item to add to an estimate. To learn more about products, [click here](#).
- (10) Terms & Conditions
 - Default terms and conditions can be changed via the dashboard settings section. You can also

change them on an estimate by estimate basis.

- (11) Tax Rates
 - You various tax rates are created via the dashboard settings section. These tax rates are then available for applying in estimates. You can apply more than one tax.
- (12) Discounts
 - You can apply a fixed or percentage-based discount.
- (13) Save Estimate
- (14) Estimate Notes
 - You can save notes which are not visible to the client.

1. Invoices Overview

You are here: Main □ Invoices □ 1. Invoices Overview

Grow CRM makes getting paid by your clients very easy and efficient. You are able to bill your customers in a variety of ways. From one -time invoices to recurring invoices, we have made the process easy and intuitive.

The place to start is the invoices pages.

:: Main Menu > Sales > Invoices

The screenshot shows the 'Invoices' overview page. At the top, there's a 'Quick stats panel' with four sections: 'Invoices (0)' (value \$0.00), 'Payments' (value \$0.00), 'Due (0)' (value \$0.00), and 'Overdue (0)' (value \$0.00). A red arrow points from the text '(1) Create a new invoice' to the 'Payments' section of the quick stats panel, which is highlighted with a red box. Below the stats is a search bar and several filter icons. The main area displays a table of invoices with columns: ID, Company Name, Project, Date, Amount, Payments, Balance, Status, and Action. Two invoices are listed: INV-000005 (Dillon Softw..., Design new w..., 05-01-2020, \$35.00, \$0.00, \$35.00, Draft) and INV-000004 (Amada Inc, Search Engin..., 07-14-2020, \$1,069.27, \$20.00, \$1,049.27, Draft). Each invoice row has a 'Quick Actions' button with numbered options (5, 6, 7, 8) corresponding to the numbered steps in the list below.

ID	Company Name	Project	Date	Amount	Payments	Balance	Status	Action
INV-000005	Dillon Softw...	Design new w...	05-01-2020	\$35.00	\$0.00	\$35.00	Draft	(5) (6) (7) (8) ...
INV-000004	Amada Inc	Search Engin...	07-14-2020	\$1,069.27	\$20.00	\$1,049.27	Draft	(5) (6) (7) ...

From this page, you are able to view and do the following:

- (1) Create a new invoice
- (2) Filter invoices, using a detailed filter panel. You can filter invoices by dates, categories, statuses, etc.
- (3) Toggle (hide/show) the Quick Stats panels
- (4) Search your invoices, using the free text search box.
- (5) Delete an invoice
- (6) Edit an invoice
- (7) Additional invoice management settings, via the quick actions button.

2. Creating Invoices

You are here: Main □ Invoices □ 2. Creating Invoices

Grow CRM allows you to easily manage your invoices. You are able to create one-time invoices or recurring invoices. The next sections will explain how to create either type of invoice.

Creating An Invoice

You can create a new invoice by clicking on the (1) Quick Add icon or by clicking on the (2) Add Invoice Button.

The screenshot shows the 'Invoices' page in Grow CRM. At the top right, there are three icons: a bell, a clipboard with a plus sign, and a user profile for 'Brian'. The clipboard icon has a red circle with '1' over it, and the red circle on the 'Add' button has a red arrow pointing to it. Below the header is a search bar and some filter options. The main area displays a table of invoices with columns for ID, Company Name, Project, Date, Amount, Payments, Balance, Status, and Action. Two specific invoices are listed: INV-000005 for Dillion Softw... and INV-000004 for Amada Inc.

Basic information

- Invoice Date *
- Due Date *
- Client *
- Project *
- Category *

Additional information

- Tags
 - Tags can be any text that allows you to easily identify or highlight important information about the invoice.
- Notes
 - You can add invoice notes, which are not visible to the client
- Terms & Conditions

- Default invoice terms are set via the dashboard settings section. You can change these default terms when you create or edit an invoice
-

Creating A Recurring Invoice

The process of creating a recurring invoice starts with the steps shown above (i.e creating a regular invoice). Once the invoice has been created, you will then have the options to make it a recurring one.

2. Editing Invoices

You are here: [Main](#) □ [Invoices](#) □ [2. Editing Invoices](#)

Once you have created an invoice, you will now want to edit it. The section below will show you how to go about doing it.

**Invoice**

#INV-000005

DRAFT**Dashboard Inc**

10 Read Road
Rochester
Kent
ZE12 8QT
United Kingdom

Bill To

Dellon Software Inc
10 Septa Drive
Rochester
kent
X12 6DT
United Kingdom

Invoice Date

05-01-2020

⑨

Payments

\$0.00

Due Date

05-31-2020

Balance Due

\$35.00

Description

Qty

Unit

Rate

Total

	Design work	<input type="text" value="Hrs"/> 1	<input type="text" value="Time"/>	<input type="text" value="35.00"/>	<input type="text" value="35.00"/>
		<input type="text" value="Mins"/> 0			

⑩

⑪

⑫

⑬

⑭

Invoice Total \$35.00

Invoice Terms

Thank you for your business. ⑮

⑯

⑰

Notes ⑯

⑱

- (1) Edit invoice:
 - To edit an invoice, start by clicking the edit invoice button. This will change the invoice from viewing mode to editing mode (*as shown in the image above*).
- (2) Delete invoice:
 - When you delete an invoice, the following items will be affected.

The Invoice's Payments – will be deleted.

- The Invoice's Notes -will be deleted.
- Expenses – Expenses that were billed on this invoice, will be detached from the invoice and will be marked as *not invoiced*. They can then be billed on any other invoice.
- Billed Hours – Any time that had been billed (i.e. time tracking hours), will be detached from the invoice and be marked as *not invoice*. The time can then be billed on any other invoice.

- **(3) Download Invoice**

- This button allows you to download the invoice in PDF format.

- **(4) Clone Invoice**

- This feature allows you to make a duplicate copy of an invoice. You can then attach that invoice to any client or project.
 - Payments will not be cloned.
 - Recurring settings will not be cloned.

- **(5) Recurring Settings**

- This feature allows you to make the invoice a recurring one, or to stop an invoice from recurring. For detailed information, see the [recurring invoices](#) section.

- **(6) Add A Payment**

- You are able to add manual payments to the invoice.
 - Payments from any enabled payment gateway (e.g. Stripe, Paypal) are automatically added to the invoice.

- **(7) Email Invoice**

- You can use this feature to resend the invoice to the customer. It will be the same email as the one sent when you published the invoice.

- **(8) Publish Invoice**

- When you create an invoice, its status is set to *Draft*. A draft invoice is not viewable by the client. Once you have finished editing your invoice, you can publish it. When an invoice is published, an email is automatically sent to the customer, with the invoice attached. The invoice then becomes viewable by the client.

- **(9) Set Invoice Dates**

- This option allows you to set invoice dates.

- **(10) Add New Blank Line**

- This will create a new blank line, for you to price/bill.

- **(11) Add New Time Line**

- Use this feature if you are specifically billing for time (i.e. hours/minutes). These are ad-hoc hours, different from hours that were logged using the time tracker.

- **(12) Product Item**

- To save you time, you can create a database of items that you commonly bill your clients. You can then use this button to quickly select an item to bill. To learn more about invoice products,

[click here.](#)

- (13) Bill An Expense
 - You can use this feature to bill your clients for any expenses that you incur on their projects (e.g. web hosting charges, materials costs, etc). To learn more about invoice products, [click here](#).
- (14) Bill Hours Worked
 - You can use this feature to bill your clients for the time spent working on project tasks (recorded using the time tracking feature). To learn more about time tracking, [click here](#).
- (15) Terms & Conditions
 - Default terms and conditions can be changed via the [dashboard settings](#) section. You can also change them on an invoice by invoice basis.
- (16) Tax Rates
 - You various tax rates are created via the [dashboard settings](#) section. These tax rates are then available for applying in invoices. You can apply more than one tax.
- (17) Discounts
 - You can apply a fixed or percentage-based discount.
- (18) Invoice Notes
 - You can save notes which are not visible to the client.

4. Recurring Invoices

You are here: [Main](#) □ [Invoices](#) □ [4. Recurring Invoices](#)

Foo

5. Invoice Products

You are here: Main □ Invoices □ 5. Invoice Products

Invoice products are the various goods/services that your organization provides. You can save all these products, making it easier and faster when creating invoices.

The best place to start is the Products page.

:: Main Menu > Sales > Products

Managing Products

The screenshot shows a list of products in a table format. The columns are: Description, Rate, Unit, Category, and Action. There are 5 rows of data. Each row has a checkbox in the first column and a set of three icons in the last column (trash, edit, more). Red numbers 1 through 8 are overlaid on the icons to indicate their functions:

Description	Rate	Unit	Category	Action
Content Creation - 1000 Words	\$70.00	Each	Default	(1) trash (2) edit (3) more
Content Creation - 500 Words	\$40.00	Each	Default	(4) trash (5) edit (6) more
Search Engine Optimization	\$3,500.00	Each	Default	(7) trash (8) edit (9) more
Web Development	\$50.00	Hr	Default	(10) trash (11) edit (12) more

From this page, you are able to view and do the following:

- (1) & (2) Create a new product
- (3) Filter estimates, using a detailed filter panel. You can filter estimates by dates, categories, statuses, etc.
- (4) Search your estimates, using the free text search box.
- (5) Delete an estimate
- (6) Edit an estimate
- (7) View an estimate
- (8) Additional estimate management settings, via the quick actions button.

Creating Products

Add New Product

X

Description*

Rate*

 \$

Units* ⓘ

Category*

 Default ▾

* Required

Submit

\$400.00

Each

Default

Basic information

- Description
- Rate
- Unit
 - e.g. Each, Item, Hrs, etc.
- Category

1. Expenses Overview

You are here: [Main](#) □ [Expenses](#) □ [1. Expenses Overview](#)

The expenses feature allows you to record all your businesses expenses. You can record expenses that you incur on customer's projects or expenses you incur in the operation of your business.

Expenses incurred on customer projects can be invoiced to the customer.

The best place to start is the Expenses page.

:: Main Menu > Sales > Expenses

Managing Expenses

The screenshot shows the 'Expenses' page with the following key elements:

- Summary Panel:** Displays quick stats: Count (6), Total (\$508.00), Invoiced (\$0.00), and Not Invoiced (\$508.00).
- Search and Filter:** Includes a search bar, a quick stats panel with numbered buttons (1-9), and a detailed filter panel with dropdowns for Date, Description, User, Client, Project, Amount, Status, and Action.
- Expense List:** A table listing three expense items with columns for Date, Description, User, Client, Project, Amount, Status, and Action. Each row includes a checkbox, a date, a description, a user photo, a client name, a project name, an amount, a status, and a series of icons for edit, delete, and more actions.

Date	Description	User	Client	Project	Amount	Status	Action
05-01-2020	Wordpress plugin	Brian	Intercape Inc.	Apple an app...	\$215.00	Pending	(6) (7) (8) (9) ...
05-01-2020	Wordpress template	Brian	Fast Applica...	Android app...	\$59.00	Pending	(6) (7) (8) (9) ...
06-01-2020	Web hosting	Brian	Genlive Inc.	Design a lan...	\$14.00	Pending	(6) (7) (8) (9) ...

From this page, you are able to view and do the following:

- (1) & (2) Record a new expense.
- (3) Filter expenses, using a detailed filter panel. You can filter expenses by dates, categories, statuses, etc.
- (4) Toggle the quick stats panel.
- (5) Search your expenses, using the free text search box.
- (6) Delete an expense.
- (7) Edit an expense.
- (8) View an expense.
- (9) Additional expense management settings, via the quick actions button.

Recording Expenses

The screenshot shows a modal dialog titled "Add Expense" over a blurred background of a expense tracking app. The form fields include:

- Description*: A large text input field.
- Date*: A date input field.
- Amount*: An amount input field with a dollar sign prefix.
- Category*: A dropdown menu set to "Default".
- Billable?: A checked checkbox.
- Client: A dropdown menu.
- Project: A dropdown menu.
- Attach A Receipt: A toggle switch that is off.

* Required

Submit

Basic information

- Description
- Date
- Amount
- Category
- Billable
 - Select this option to enable you to invoice this expense.
- Client
 - For internal, business expenses, you can leave this blank

- Project
 - For internal, business expenses, you can leave this blank
- Attach A Receipt

1. Tickets Overview

You are here: [Main](#) □ [Tickets](#) □ [1. Tickets Overview](#)

The support tickets feature enables you to boost your customer satisfaction by providing them with speedy assistance. Your customers are able to open new support tickets and your team can work together to resolve customer issues.

You can create multiple departments (e.g. Sales, Support, etc). This is done via the settings section of the dashboard.

The best place to start is the Tickets page.

:: Main Menu > Support

Managing Tickets

The screenshot shows the 'Tickets' overview page. At the top, there's a 'Quick Ticket Stats' panel with four categories: 'All' (4 tickets), 'Open' (2 tickets), 'Answered' (2 tickets), and 'Closed' (0 tickets). A red arrow points to the 'Open' category. To the right of the stats are several icons: a search bar, a line graph, a filter icon, and a plus sign for creating new tickets. Below the stats is a table listing five open tickets. Each ticket row includes columns for ID, Subject, Client, Date, Priority, Activity, Status, and Action. The first ticket (ID 8) is selected. The 'Action' column for each ticket contains three icons: a trash bin (Delete), a pencil (Edit), and a checkmark (View). Red numbers (1 through 7) are overlaid on these icons to indicate specific interactions or steps.

ID	Subject	Client	Date	Priority	Activity	Status	Action
8	New content required	Intercap Investments Inc	07-26-2020	Normal	35 seconds ago	Answered	(1) (2) (3)
7	Help with my project	Intercap Investments Inc	07-26-2020	Normal	---	Open	(4) (5) (6)
6	Unable to login to the frontend of...	Amada Inc	07-11-2020	Normal	2 weeks ago	Answered	(7) (8) (9)
5	I am unable to download the project...	Amada Inc	07-11-2020	Normal	---	Open	(10) (11) (12)

From this page, you are able to view and do the following:

- (1) Open a new ticket.
- (2) Filter tickets, using a detailed filter panel. You can filter tickets by dates, statuses, etc.
- (3) Toggle the quick stats panel.
- (4) Search your tickets, using the free text search box.
- (5) Delete a ticket.
- (6) Edit a ticket.
- (7) View a ticket.

Create A Support Ticket

Tickets

APP > TICKETS > COMPOSE NEW TICKET

Ticket Options

Client (4)

Project

Department

Priority (5) Normal

Subject:

(1)

(2)

(3)

(4)

(5)

Drop files here or click to upload

Submit Ticket

The screenshot shows a 'Compose New Ticket' interface. On the left, there's a sidebar with 'Ticket Options' and dropdown menus for 'Client', 'Project', 'Department', and 'Priority'. The 'Priority' dropdown is highlighted with a red border and has a red number '5' next to it. To the right is a main area with a 'Subject:' input field (red number 1), a rich text editor (red number 2), and a dashed box for file uploads (red number 3). The 'Client' dropdown (red number 4) and 'Priority' dropdown (red number 5) are noted as being visible only on the server-side.

- (1) Ticket subject.
- (2) Ticket message.
- (3) Attach multiple files.
- (4) & (5) These are not visible on the client-side of the dashboard.

Reply A Support Ticket

The image below shows the support ticket view. You are able to reply, change departments, change the priority, and attach files.

New content required

APP > INVALID DEPARTMENT > ID #8



Ticket Details

DEPARTMENT

Support

CREATED

07-26-2020 At 13:03

CLIENT

Intercap Investments Inc

PROJECT

ACTIVITY

1 hour ago

PRIORITY

Normal

STATUS

Answered

[Edit Ticket](#)



Carl Gill

1 hour ago

Can you please add an additional 10 blog posts to my order?

Thanks



Brian Millard

1 hour ago

Hi Carl, I have updated your project, to include an additional 10 blogs. If you require anything further, please let me know.

07-26-2020 At 13:05

[Reply Ticket](#)

1. Knowledge base overview

You are here: [Main](#) □ [Knowledge Base](#) □ [1. Knowledge base overview](#)

The knowledge base feature allows you to create help and informational articles for both your clients and your team members.

You can create frequently asked questions, step by step instructions, help documentation, etc.

You manage your knowledgebase categories via the settings dashboard and you manage your articles via the dashboard front end.

The best place to start is the knowledge base page.

:: Main Menu > Knowledge Base

Overview

The screenshot shows the 'Search Our Knowledgebase' page. At the top, there is a search bar with a magnifying glass icon (1) and a red 'Search' button (2). Below the search bar, there are four category cards:

- Frequently Asked Questions**: Answers to some of the most frequently asked questions. Includes a 'see articles' button (3).
- Account**: Help on managing your account and your account users. Includes a 'see articles' button.
- Projects**: Information on how to manage your projects. Includes a 'see articles' button.
- Billing**: Information on invoices, payments and subscriptions. Includes a 'see articles' button.

From this page, your users are able to:

- (1) Search the knowledge base.
- (3) Open a support ticket for more help.
- (4) View articles in a particular category.

Category Listing

1. How do I reset my password 

... 

2. Adding new users to your account 

This is a test 

Categories

Frequently Asked Questions

Account

Projects

Billing

From this page, your users are able to do the following:

- (1) View a list of all the available articles.
- (2) View a list of all the categories.
- (3) Search the articles in this category.

From this page, you are able to do the following:

- (4) Create new articles for this category.
- (5) Edit/managed all articles.

1. Main Settings

You are here: [Main](#) □ [Settings](#) □ [1. Main Settings](#)

From this settings page, you will be able to set your application's general settings. Each of the settings is further explained below.

Product Purchase Code

This code is found inside your Codecanyon dashboard. An example is shown below

The screenshot shows a product listing for 'Grow CRM - Client & Project Management'. At the top, there are filters: 'All marketplaces' and 'Sort by: Date Purchased'. Below the product title, it says 'Regular License' and '6 months of support remaining. [Extend now.](#)'. There is a checked checkbox for 'Get notified by email if this item is updated'. To the right, there are two main download options: 'Download' (highlighted with a red box) and 'Install Theme'. Below these are four smaller download links: 'All files & documentation', 'Installable WordPress file only', 'License certificate & purchase code (PDF)', and 'License certificate & purchase code (text)' (also highlighted with a red box).

Time Zone

You can set the timezone that will be used throughout the application. If most of your clients are in a particular timezone, you can set to that particular timezone.

It will make it easier for your clients to understand the dates and times that are being displayed in the application, as they will be in their timezone.

If however, your clients are from different countries, it best to set to UTC timezone.

Date Format

This is the date format that will be used throughout the application. It is usually best to set it to a format that is used by most of your clients.

- m = Month
- d = Day
- Y = Year

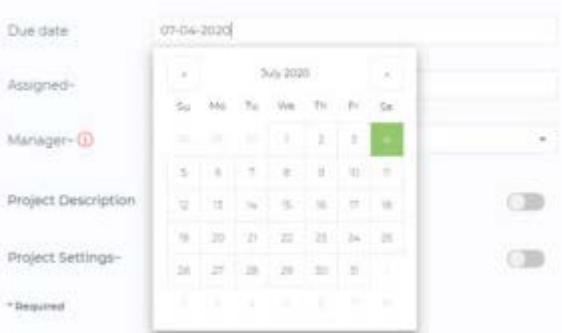
For example., if most of your clients are from North America and Canada, you can use m-d-Y format.

Date Picker Format

This is the format that is used in the date picker popups that are used in forms. It is best to keep this in a similar format to the one used above.

- mm = Month
- dd = Day
- yyyy = Year

Example Date Picker



Left Menu Position – Default Position

This set how the main, left side menu is displayed by default. Note that users will be able to set their preferences from inside the dashboard.

Stats Panel – Default Position

This sets the default visibility of the Quick Stats (i.e. visible or hidden).

15 Total Projects~	3 In Progress~	1 On Hold~	0 Completed~
<hr/>			
<input type="checkbox"/> ID Title	Client	Start Date Due date Progress	Team~ Status Action
<input type="checkbox"/> 17 Testing	Intercape In...	07-01-2020 ---	Not Started
<input type="checkbox"/> 14 Search engine optimi...	Linda Seo In...	05-21-2020 06-30-2020	In Progress
<input type="checkbox"/> 13 Redesign the label f...	Ketplan Proj...	05-01-2020 08-10-2020	On Hold

Table Pagination Limits

The number of rows displayed for records (e.g. Project, Invoices, Estimates, etc). This also sets the number of rows that are displayed when you click the Load More button.

Kanban Pagination Limits

The number of cards displayed on Kanban Board lists (e.g. Tasks, Leads). This also sets the number of cards that are displayed when you click the Load More button.

Currency Symbol

This is the currency that will be used for all billing in the application (e.g. Invoices, Estimates, etc).

Decimal Separator

This sets the symbol (common, full stop, etc) that is used for the decimal point when displaying numbers (e.g. 10.00).

Thousands Separator

This sets the symbol (common, full stop, etc) that is used when displaying money values (e.g. 1,000.00).

Currency Symbol Position

This sets the positioning of the current symbol. (e.g. \$100.00 or 100.00\$).

Close Modal Windows On Page Click

To avoid modal windows accidentally, when you click outside them, you can set this value to avoid this.

Default Language

This is the default language that is used application-wide. Users will be able to change this default language, as per the setting applied in the Allow Users To Change Language setting below.

Allow Users To Change Language

When this setting is enabled, all users will be able to change their application language.

2. Company Settings

You are here: [Main](#) □ [Settings](#) □ [2. Company Settings](#)

From this screen, you are able to set your organization's details. These are the details that will be used on Invoices, Estimates, etc.

Company

APP~ > SETTINGS > COMPANY

Company Name
Dashboard Inc

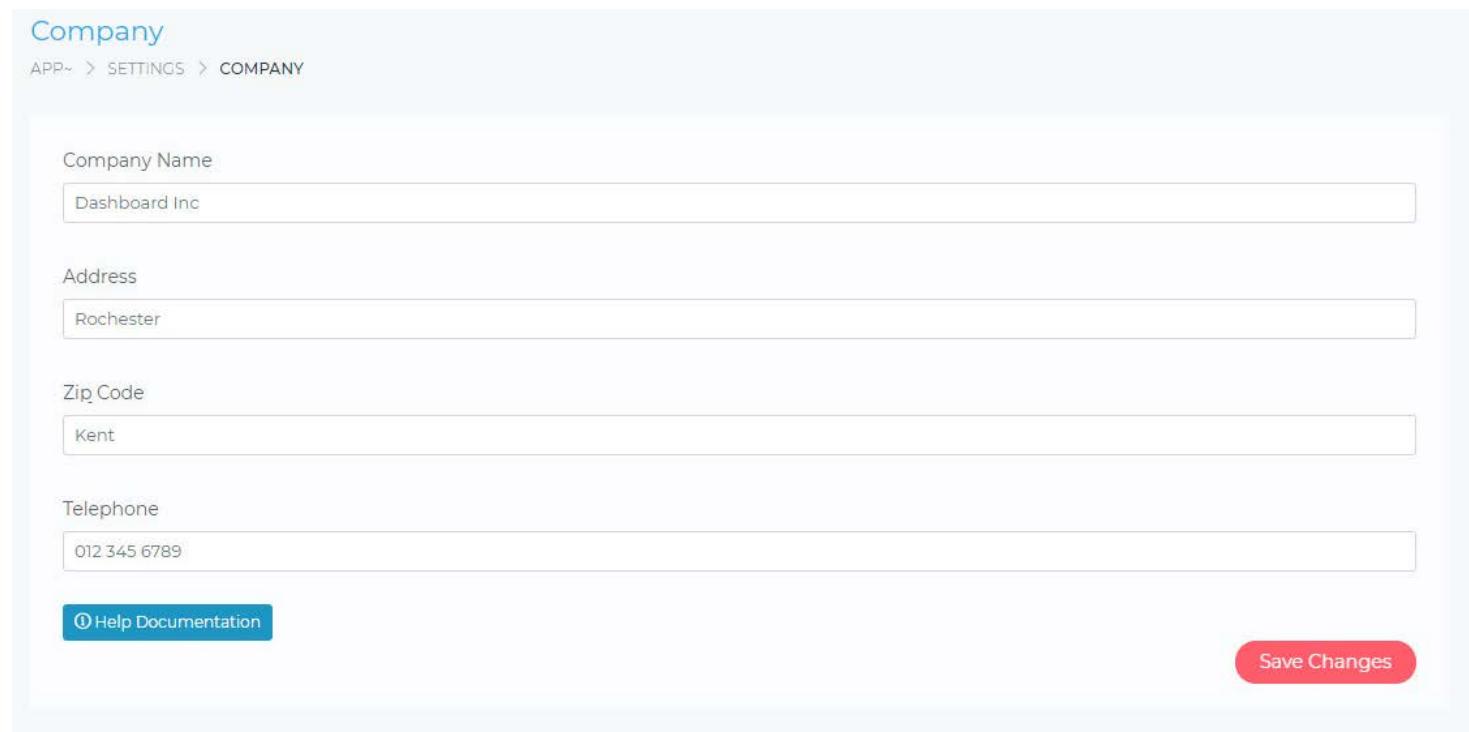
Address
Rochester

Zip Code
Kent

Telephone
012 345 6789

[① Help Documentation](#)

[Save Changes](#)



1. Start Here – Error Logs

You are here: [Main](#) □ [Errors & Debugging](#) □ [1. Start Here - Error Logs](#)

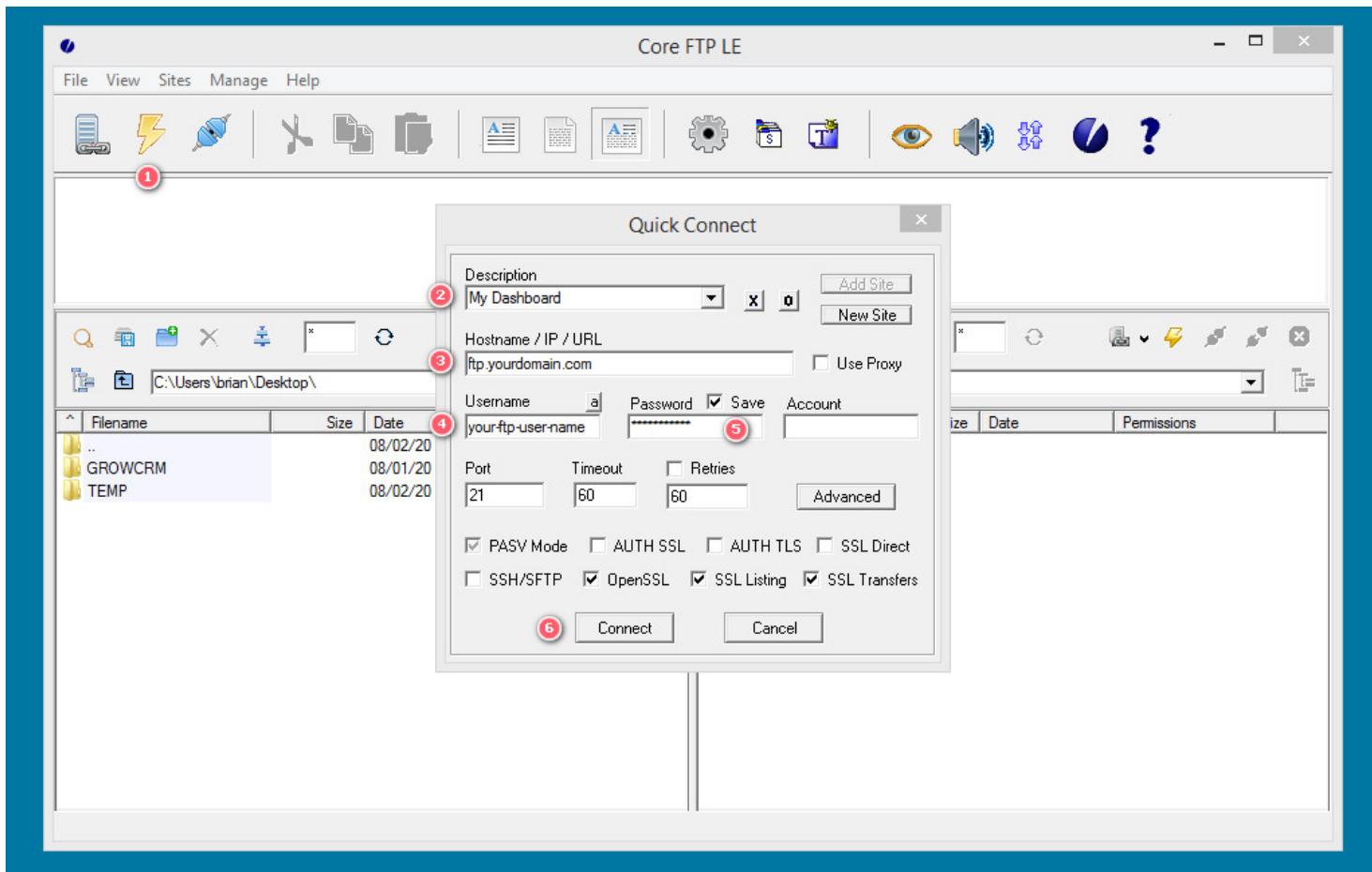
Most problems/errors that you encounter with Grow CRM, are recorded in the error logs. Whenever you get in touch with us for help, you may be asked to send us your error logs.

This section will show you how to download and view your error logs.

DOWNLOADING ERROR LOGS

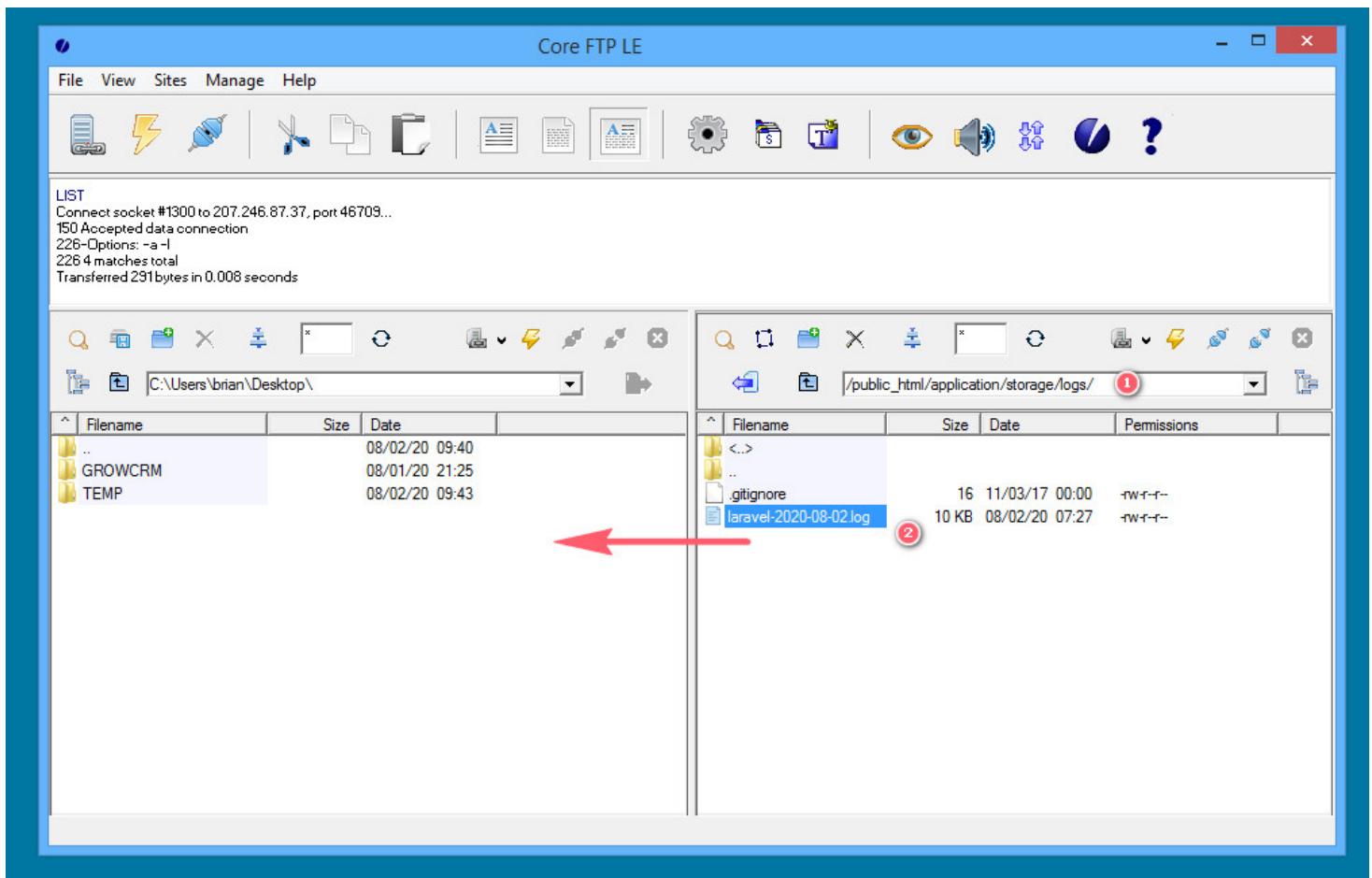
To download the error logs, you will need to connect to your server via FTP. If your web hosting control panel has a file browsing tool, you can also use that instead.

The instructions below are for downloading via FTP. You will need an FTP client, we recommend a free one like CoreFTP.



The details below are for connecting with the CoreFTP application. If you are using a different FTP client, the concept will generally be the same.

- (1) Start a new connection.
- (2) Input any name you like (e.g. My Dashboard)
- (3) Input your server's FTP address.
 - This is usually `ftp.yourdomain.com` or even just `yourdomain.com`
- (4) Input your FTP Username & Password.
 - These would have been provided to you by your web hosting provider. For Cpanel users, they are also usually the same as your Cpanel dashboard login details.



Once you have connected (as in the image shown above) You will need to do the following:

- (1) On the right side (which is your server), you will need to change to the folder:
 - `/public_html/application/storage/logs`
- (2) If there have been any errors, you will see error log files, named by date.
 - Drag and drop them on your desktop (or any other folder) on your computer. Your computer is the section on the left of the FTP client (as shown above)

You can now open the error log, using any text editor like notepad, Vscode, Atom, Sublime Text, etc.

2. Common Errors & Issues

You are here: [Main](#) □ [Errors & Debugging](#) □ [2. Common Errors & Issues](#)

This page is continually being updated. We will explain the various errors and their possible solutions.

In the information below, references will be made to error logs. Please make sure you have read the section on how to download and view error logs.

BLANK WHITE PAGE

If you are getting a blank white page, be it during setup or when using the application, it means that the application has encountered an error, however, your web hosting server is not set to display the error(s) on the screen. You can instead take a look at the [error logs](#), to identify the error.

REQUEST COULD NOT BE COMPLETED

If you get a popup that says that the request could not be completed, it usually means that an error was encountered when processing your request/action. Please download the [error logs](#) to see more details about the actual error.

NOT RECEIVING EMAILS

If you are not getting any emails (e.g. transactional emails), please ensure that you have completed setting up your email settings, in the application's [email settings](#) section.

If you have completed setting up your email server and you are still not getting any emails, these are the possible reasons and solutions.

- Email is being treated as spam.
 - This is a common error and is not caused by the application. You will need to contact your web hosting provider so that they can help you set up DKIM & SPF records for your domain name. DKIM & SPF records are used by email providers to verify and increase the trust of email coming from your server.

- Your email server has been blacklisted.
 - This is another common problem. where your web hosting server may have been blacklisted due to current/previous spamming. This is usually common for shared hosting. You can check if your server has been **blacklisted here**. If your server is blacklisted, you will need to contact your web hosting provider for help.
 - SMTP port is not open.
 - If you are using a service like Digitalocean or Vultr, you may need to contact them and ask them to open the SMTP port on your droplet/server. Some providers do not have this port open by default.
-

500 SERVER ERROR

If you are getting a 500 server error, it means that the application has encountered an error and you will need to download the **error logs**, to identify the error.

3. Change Company Logo

You are here: [Main](#) □ [Settings](#) □ [3. Change Company Logo](#)

The Logo settings page allows you to change the dashboard logo.

The dashboard requires 2 logos, as follows:

- Large Logo – Ideal size is (185px X 45px). The large logo is used when the dashboard menu is expanded. It is also used on all documents such as Invoices, Estimates, etc.
- Small Logo – This is normally your logo icon. The ideal size if (45px X 45px). This logo is used when the dashboard menu is collapsed.

The best file format for the logos is png. Ideally, the png should have a transparent background.

Settings

APP~ > SETTINGS > GENERAL SETTINGS~

Large Logo



Used when the main menu is expanded
Also used on invoices, estimates, etc.
Best image dimensions : (185px X 45px)

Change Logo

Small Logo



Used when the main menu is collapsed
Best image dimensions : (45px X 45px)

Change Logo

4. Theme

You are here: [Main](#) □ [Settings](#) □ [4. Theme](#)

From this page, you will be able to set the default theme that is used by the applications.

You will also be able to set the following details:

- Head – Here you can place any custom Javascript (e.g. Google Analytics)
- Body – Here you can place any custom Javascript/HTML that will be added just before the closing body tag

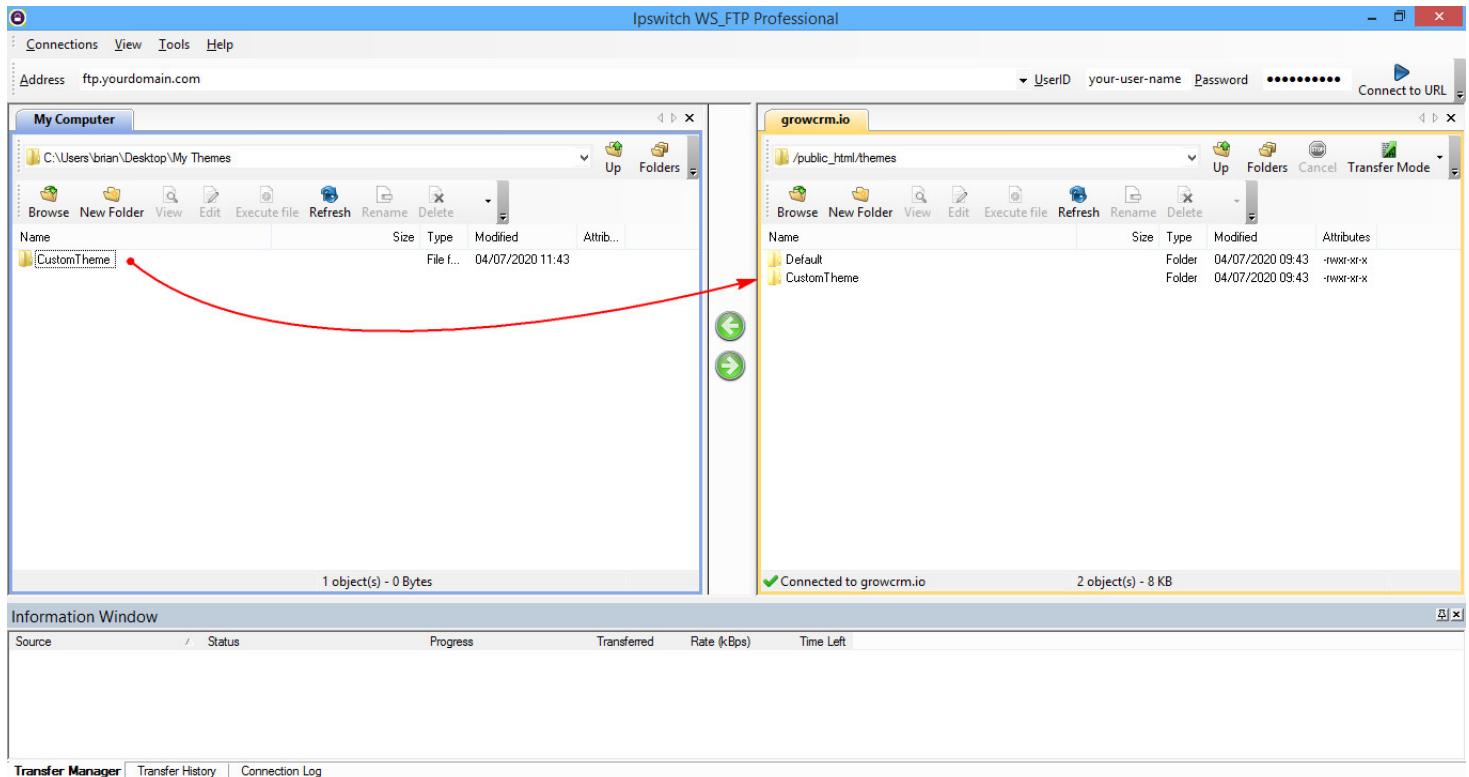
The screenshot shows the 'Theme' settings page. At the top, there's a breadcrumb navigation: APP~ > SETTINGS > THEME. The main area has a light blue header bar with the text 'HTML or Javascript code pasted here will be placed inside the [HEAD] & [BODY] tags (e.g. Google Analytics)'. Below this, there are two large text input areas: 'Head' and 'Body', both currently empty. At the bottom left is a 'Help Documentation' button, and at the bottom right is a red 'Save Changes' button.

Installing A New Theme

If you have purchased a new theme from us, or if you have created your own theme, below are the instructions to show you how to upload that theme.

Once you have uploaded your theme, it will become available in the Theme settings shown above.

- Connect to your website via FTP.
- Open the folder named Themes.
- Upload your entire unzipped theme folder. You will end up with a structure that looks like the one shown below.



In the example above, we are using the WS_FTP FTP client. You can download that [here](#).

5. Cron Job Settings

You are here: [Main](#) □ [Settings](#) □ [5. Cron Job Settings](#)

Cron Jobs Introduction

Cron Jobs are a critical part of the application.

A Cron Job is a process that is executed by your web hosting server, in the background.

Cron jobs are used for very important tasks such as the ones listed below:

- Routinely marking invoices as due, overdue, etc.
- Send invoice reminders.
- Cleaning up the database.
- Generating recurring invoices, when they fall due.
- etc etc.

How To Setup A Cron Job

We provide you with a unique URL like command inside the dashboard. You will need to add this command inside your web hosting providers control panel. Step by step instructions are given below.

STEP 1

Copy the cron job command from inside your dashboard (GrowCRM).

Dashboard > Settings > Cronjobs

Copy the Cron job Command (as shown in the image below)

Settings

APP~ > SETTINGS > CRON JOB SETTINGS

Cron Job Command

```
php /mnt/hgfs/yourdomain.com/application/artisan schedule:run >> /dev/null 2>&1
```

This Cron Job must be added/configured inside your webhosting providers control panel

Cron Job Status

The Cron Job does not appear to be active. This status message will update once the Cronjob has run

[① Help Documentation](#)

STEP 2

Log in to your web hosting providers control panel. The most common control panel used by web hosting providers is Cpanel. will provide the instructions for Cpanel. If your web hosting provider uses a different control panel, the steps will usually be very similar to cpanel.



Username



your-user-name

Password



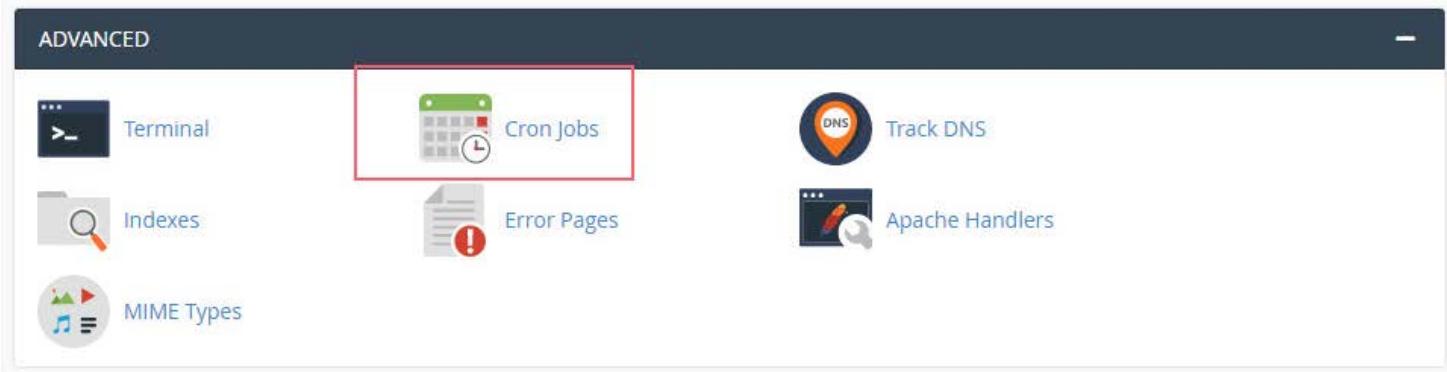
.....

Log in

Reset Password

STEP 3

Find the button that say Cron Jobs and click it, as show in the image below.



STEP 4

On the next screen, do the following:

- Click on the Common Settings drop down list and select Once Per Minute.
- This will automatically prefill all the other form field. You do not need to make any changes to them.
- Paste the command the you copied from your Dashboard into the Command field
- Click the Add New Cron Job button

Once you have done all the steps above, you would have finished setting up the Cron Job.

After a few minutes, if you log in to your Dashboard (GrowCRM), you should see that the cron job would have executed.

6. Client Settings

You are here: [Main](#) □ [Settings](#) □ [6. Client Settings](#)

The client settings page allows you to set the following:

- Allow Customer To Signup – If this is enabled, anyone will be able to register as a new client. Registration is done via the login page.
- Enable Shipping Address – Enable this if you want to collect and record your customer's shipping addresses. Note that billing addresses are enabled by default.

Clients

APP ~ > SETTINGS > CLIENTS

Allow Customer To Signup

Enable Shipping Address

[Help Documentation](#)

Save Changes

7. Category Settings

You are here: Main □ Settings □ 7. Category Settings

Categories allow you to organize your Dashboard's content in a better way.

Categories are available for Invoices, Estimates, Projects, etc.

You will be able to use/select your categories, whenever you are creating a new item, such as a new project.

Example

You may want to create categories for your project's as follows:

- Logo Design
- Web Development
- WordPress Plugins
- etc etc

The screenshot shows the 'Categories' section of the settings. On the left is a sidebar with navigation links like Main Settings, Clients, Categories, Projects, Contracts, Expenses, Invoices, Leads, Products, Estimates, Projects, Leads, and Milestones. The 'Categories' link is highlighted. The main area has a header 'Categories' with a back arrow, a user profile for Brian, and a search bar. Below is a table of categories:

Name~	Created By~	Date Created~	Items~	Status~	Action
Andriod App	Brian	06-21-2020	3	---	(trash) (edit)
Default ★	System	01-01-2020	8	Default	(trash) (edit)
Logo Design	Brian	06-21-2020	2	---	(trash) (edit)
Web Development	Brian	06-21-2020	1	---	(trash) (edit)
WordPress	Brian	06-21-2020	1	---	(trash) (edit)

Red boxes highlight specific elements: 'Add new category' (top right), 'Default Category' (under the first row), 'Delete Category' (next to the second row), and 'Edit Category' (next to the third row). Red arrows point from these labels to their respective targets in the interface.

- To create a new category, simply click the add button, as shown above.
- You can also change the name of a category by clicking the edit button.
- You can also move items from one category to another
- Note: that you cannot delete the system Default category

- Note: You cannot delete a category that already has items in it. You must first move the items into another category.

8. Project Settings

You are here: [Main](#) □ [Settings](#) □ [8. Project Settings](#)

The project settings page allows you to change various aspects of how the Dashboard handles projects. Below are the settings and their explanations.

General Settings

From this page, you can set the following information;

- Default Hourly Rate – This is the hourly rate that is automatically applied to a new project. This can however be changed when creating or editing a project.

The screenshot shows the 'General Settings' page under the 'PROJECTS' section of the 'SETTINGS' menu. On the left, there's a sidebar with links like 'Main Settings', 'Clients', 'Categories', 'Projects' (which is selected), 'General Settings' (which is highlighted in blue), 'Team Permissions', 'Client Permissions', 'Leads', 'Milestones', 'Tasks', 'Sales', 'Tags', and 'Payment Methods'. The main content area has a header 'Settings' with a breadcrumb 'APP > SETTINGS > PROJECTS > GENERAL SETTINGS'. It features a 'Default Hourly Rate' input field containing '35.00'. A red 'Save Changes' button is at the bottom right. A 'Help Documentation' link is also present. The top right corner shows user icons for Brian and a notification bell.

Team Permissions

From this page, you are able to set the Task Collaboration option.

When the option is enabled, all team members who are assigned to a project will be able to work together on the project's tasks, as follows;

- View everyone's tasks.
- Edit everyone's tasks.

- Comment, upload files, create checklists, etc, on everyone's tasks.

The screenshot shows the 'Team Permissions' section of the 'PROJECTS' settings. On the left sidebar, 'Team Permissions' is highlighted. The main area displays a single permission setting: 'Tasks Collaboration' with a checked checkbox. A 'Help Documentation' button is located below the setting, and a 'Save Changes' button is on the right.

Client Permissions

These are the default settings that determine the level of permissions that a client user has, on a project.

These default setting can also be changed when a project is being created or edited

The screenshot shows the 'Client Permissions' section of the 'PROJECTS' settings. On the left sidebar, 'Client Permissions' is highlighted. The main area lists several permissions with checkboxes: 'View Tasks' (checked), 'Tasks Participation**' (unchecked), 'Create Tasks**' (unchecked), 'View Time Sheets' (unchecked), and 'View Expenses' (unchecked). A note at the bottom states: '** If these items are selected, then (viewing permission) will be enabled automatically.' A 'Help Documentation' button is located below the list, and a 'Save Changes' button is on the right.

- View Tasks – When enabled, the client will be able to view all tasks that are created on their project.
- Tasks Participation – When enabled, the client will be able to comment, attach files, create checklists, etc, on the project.

Create Tasks – When enabled, a client will be able to create new tasks for their project.

- View Time Sheets – When enabled, the client will be able to see all the time logged by team members on their project.
- View Expenses – When enabled, the client will be able to view all expenses record on their project

9. Leads Settings

You are here: [Main](#) □ [Settings](#) □ [9. Leads Settings](#)

From the leads settings page, you will be able to apply settings for how the application will handle leads. Below are the available settings.

General Settings

Here you can specify what information will be displayed on each lead when being viewed in kanban mode. Example as illustrated in the image below

The screenshot shows the growcrm application interface. On the left is a sidebar with navigation links: Dashboard, Customers, Projects, Tasks, Leads (which is selected and highlighted in blue), Sales, Support, Knowledge Base, and Settings. The main area is titled "Leads" and shows a "New" lead card for "Testing 5". The card displays the following information: Colex Mine, \$0.00, Telephone: ---, Created: 07-01-2020, Contacted: ---, and Email: ---. A red box highlights the contact information section. A red arrow points from the text "Data displayed on the lead card" in a red box at the bottom right towards the highlighted section of the lead card. The lead card also features two small profile pictures in the bottom right corner.

Data displayed on the lead card

The data shown on the image above can be changed using the settings shown below.

- Main Settings >
- Clients
- Categories
- Projects
- Leads**
- General Settings**
- Lead Stages
- Lead Sources
- Milestones >
- Tasks >
- Sales >
- Tags >
- Payment Methods >
- Formats >

Settings

APP~ > SETTINGS > LEADS

Kanban Board Settings

Select the items that are shown on the front of each lead, when viewing in Kanban mode.

Lead Value	<input checked="" type="checkbox"/>
Date Created	<input checked="" type="checkbox"/>
Category	<input type="checkbox"/>
Date Last Contacted	<input checked="" type="checkbox"/>
Telephone	<input checked="" type="checkbox"/>
Email Address	<input checked="" type="checkbox"/>
Lead Source	<input type="checkbox"/>

[Help Documentation](#)[Save Changes](#)

Lead Stages

Lead stages are the various stages that a lead moves through. When you get a new lead, it will be placed in the New stage. As you make progress with the lead, you can move it to Qualified -> Contacted -----> Converted.

The system requires a minimum of 2 staged New & Converted. You can create as many other stages as you like, between these two start and final stages.

The image below shows how the stages are used when working with your leads.

Dashboard

Customers >

Projects

Tasks

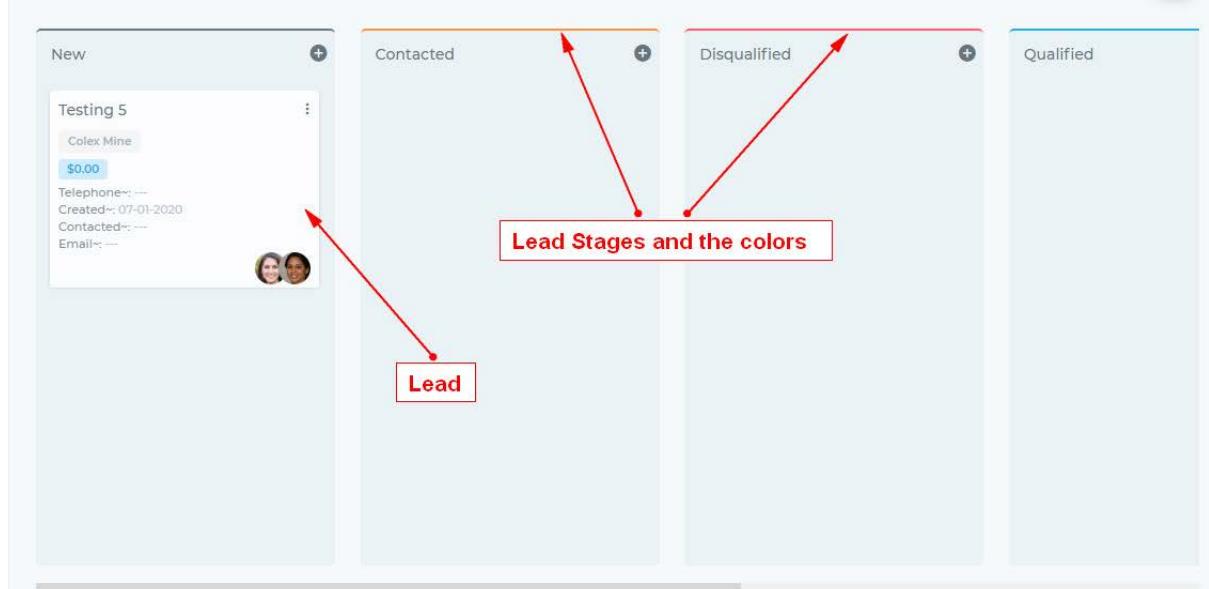
Leads

Sales >

Support

Knowledge Base

Settings >



The image below shows the Lead Stages settings

Change the ordering of stages

Name~	Count Leads~	Color~	Created By~	Action
New ★ Initial Stage~	1			Create New Stage
Contacted	0			Edit Stage
Qualified	0			Delete Stage
Disqualified	0			Move Leads
Proposal Sent	0			Edit Stage
Converted ★ Final Stage~	0			Delete Stage

Color that is used for lead status & board color

Help Documentation

From the screen above, you will be able to carry out the following action:

- Add and delete lead staged (Note: You can not delete the default stages, marked with the star icon)
- Change the lead stage color
- Edit the lead (change its name)
- Bulk move leads from one stage to another)
- Change the ordering of the lead staged (using drag & drop)

From this screen, you will be able to specify lead sources (e.g. Google, Yellow Pages, etc). Users will be able to select these sources via a dropdown list when creating new leads.

The screenshot shows the 'LEAD SOURCES' section of the 'LEADS' settings. The left sidebar has 'Leads' selected under 'Lead Sources'. The main area shows a table with two rows:

Name~	Date Created~	Created By~	Action
Yellow Pages	07-04-2020	Brian	
Google Search	07-04-2020	Brian	

At the top right, there is an 'Add lead source' button with a red arrow pointing to it. Below the table, there are three buttons: 'Edit lead source' (with a red arrow), 'Delete lead source' (with a red arrow), and a red plus sign button.

From this screen, you will be able to do the following:

- Add new lead sources.
- Edit existing lead sources
- Delete lead sources

Note: When you delete or edit lead sources on this page, the changes will not affect leads that have already been created.

10. Milestone Settings

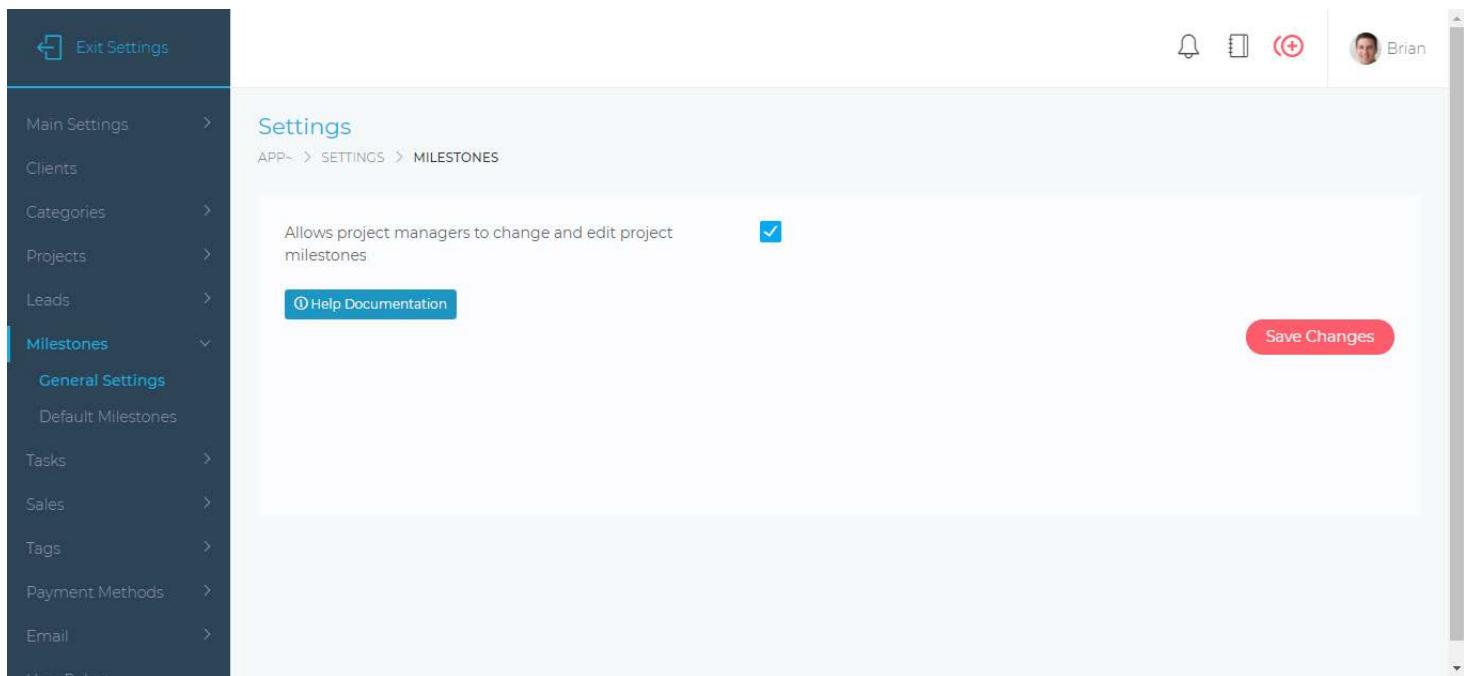
You are here: [Main](#) □ [Settings](#) □ [10. Milestone Settings](#)

From the milestone setting page, you will be able to apply settings for how the application will deal with Milestones.

General Settings

This page allows you to specify the following settings:

- Set whether team members can create, edit, delete project milestones.



The screenshot shows a user interface for managing project settings. On the left is a sidebar with a dark background containing various project management categories: Main Settings, Clients, Categories, Projects, Leads, and Milestones. The 'Milestones' category is currently selected, indicated by a blue border around its name and a blue arrow icon next to it. Under 'Milestones', there is a sub-section titled 'General Settings'. In the main content area, the title 'Settings' is displayed above the path 'APP > SETTINGS > MILESTONES'. A single configuration option is shown: 'Allows project managers to change and edit project milestones', which has a checked checkbox to its right. Below this option is a 'Help Documentation' button. In the bottom right corner of the main area, there is a red 'Save Changes' button. At the top of the page, there are several small icons: a bell, a document, a plus sign, and a user profile picture labeled 'Brian'. On the far left edge of the sidebar, there is a white 'Exit Settings' button.

Default Milestones

From this screen, you are able to create default milestones which will be added whenever a new project is created.

Note: If you have allowed team members to create and edit milestones (in the step above), they will be able to override these default milestones. Changes that team members make, will only apply to that particular project.

The screenshot shows the 'Milestones' section of the settings menu. On the left, a sidebar lists various settings categories like Main Settings, Clients, Categories, Projects, Leads, Milestones (which is selected), Default Milestones, Tasks, Sales, Tags, Payment Methods, and Email. The main content area is titled 'Settings' and 'MILESTONES'. It displays a table with four rows of default milestones. The columns are 'Name~' (Planning, Design, Development, Testing), 'Date Created~' (06-27-2020), 'Created By~' (Brian), and 'Action' (Edit icon, Delete icon). A red box highlights the 'Rearrange milestones' button above the table. Another red box highlights the 'Add new milestone' button at the top right. A red arrow points from the 'Edit' icon in the 'Action' column of the 'Testing' row to a 'Edit milestone' callout. A second red arrow points from the 'Delete' icon in the same row to a 'Delete milestone' callout. A red box also highlights the 'Help Documentation' button at the bottom left of the table.

Name~	Date Created~	Created By~	Action
Planning	06-27-2020	Brian	
Design	06-27-2020	Brian	
Development	06-27-2020	Brian	
Testing	06-27-2020	Brian	

On this screen, you will able to do the following

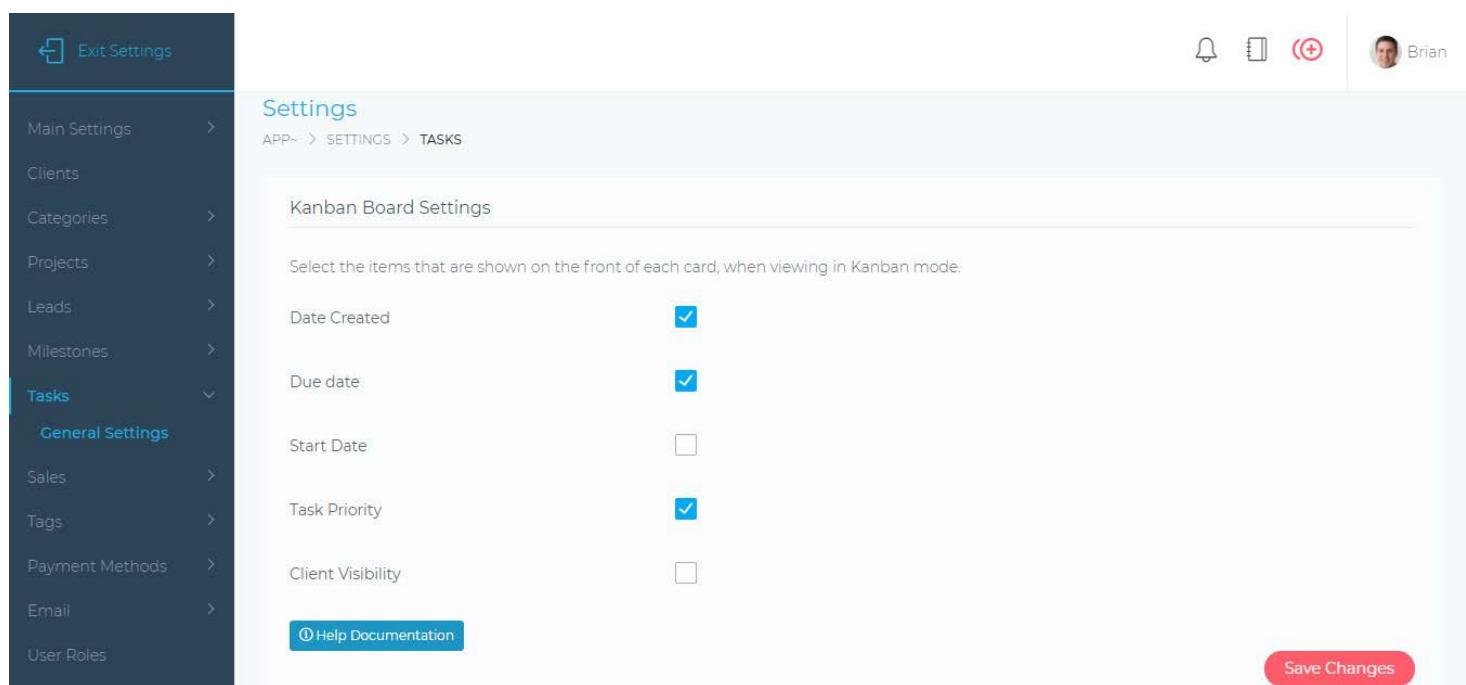
- Create default milestones.
- Rearrange the position of milestones (as displayed in a project).
- Edit and delete default milestones.

11. Task Settings

You are here: [Main](#) □ [Settings](#) □ [11. Task Settings](#)

From the task settings page, you will be able to apply settings for how the application will deal with tasks.

General Settings



The screenshot shows the 'Kanban Board Settings' section of the Task Settings page. On the left is a sidebar with navigation links like Main Settings, Clients, Categories, Projects, Leads, Milestones, Tasks, General Settings, Sales, Tags, Payment Methods, Email, and User Roles. The 'Tasks' link is currently selected. The main content area has a breadcrumb path: APP~ > SETTINGS > TASKS. It displays a list of items to be shown on task cards: Date Created (checked), Due date (checked), Start Date (unchecked), Task Priority (checked), and Client Visibility (unchecked). A 'Help Documentation' button and a 'Save Changes' button are at the bottom.

Item	Checked
Date Created	✓
Due date	✓
Start Date	✗
Task Priority	✓
Client Visibility	✗

From this page, you can specify what information is displayed on the task card, when viewing in kanban mode. An example is shown below.



Tasks

APP~ > TASKS~



New



Design draft proposals



Normal

Created~: 07-04-2020

Due~: ---



Displayed information

12. Invoice – Settings

You are here: Main □ Settings □ 12. Invoice - Settings

The invoice settings page allows you to change various aspects of how the Dashboard handles invoices. Below are the various settings and their explanations.

The screenshot shows the 'Sales' section of the Dashboard's sidebar with 'Invoices' selected. The main content area is titled 'Settings' under 'SALES > INVOICES'. It contains three main configuration sections: 'Invoice Prefix' (set to 'INV-'), 'Recurring Invoice - Due Date Allowance' (set to '3'), and 'Terms and conditions' (containing the text 'Thank you for your business.' and rich text editing tools). A 'Help Documentation' button and a 'Save Changes' button are at the bottom.

On this page you will be able to apply the following settings:

- Invoice Prefix. This is any text you want to be prefixed to the invoice number.
 - Example INV- will create invoices as follows: INV-000276
- Recurring Invoice – Due Date Allowance – The number of days before a nearly created, recurring invoice, becomes due.
- Terms and conditions – The default terms and conditions that are displayed on an invoice. These terms can also be changed when creating or editing an invoice.

13. Estimate Settings

You are here: Main □ Settings □ 13. Estimate Settings

The estimate settings page allows you to change various aspects of how the Dashboard handles estimates. Below are the various settings and their explanations.

The screenshot shows the 'Estimates' settings page under the 'Sales' category. On the left, a sidebar lists various sales-related settings: Invoices, Tax Rates, Estimates (which is selected and highlighted in blue), Expenses, Product Units, Tags, Payment Methods, Email, User Roles, Tickets, and Other. The main content area is titled 'Settings' and shows the 'ESTIMATES' section. It contains two main fields: 'Estimate Prefix' with the value 'EST-' and 'Terms and conditions' which is a rich text editor. At the bottom of the page are two buttons: 'Help Documentation' and 'Save Changes'.

On this page you will be able to apply the following settings:

- Estimate Prefix. This is any text you want to be prefixed to the invoice number.
 - Example EST- will create invoices as follows: EST-000276
- Terms and conditions – The default terms and conditions that are displayed on an estimate. These terms can also be changed when creating or editing an estimate.

14. Expense Settings

You are here: Main □ Settings □ 14. Expense Settings

The expense settings page allows you to change various aspects of how the Dashboard handles expenses. Below are the various settings and their explanations.

The screenshot shows the 'Sales' section of the APPs dashboard. On the left, a sidebar lists various settings under 'Sales' and 'Expenses'. Under 'Sales', there are links for Invoices, Tax Rates, Estimates, Tags, Payment Methods, Email, User Roles, Tickets, and Other. Under 'Expenses', there is a link for Product Units. The main content area is titled 'Settings' and shows the 'EXPENSES' tab selected. It contains a single setting: 'Mark expense as billable by default' with a checked checkbox. Below this is a 'Help Documentation' button and a 'Save Changes' button. The top right corner shows user profile icons for Brian and others, along with notification and search icons.

- **Mark expense as billable by default** – When enabled, every new expense that is being created will be marked as billable. This setting can be changed when creating a new expense.

15. Tag Settings

You are here: [Main](#) □ [Settings](#) □ [15. Tag Settings](#)

The tag settings page allows you to change various aspects of how the Dashboard handles tags. Below are the various settings and their explanations.

General Tag Settings

The screenshot shows the 'General Tag Settings' page. On the left is a dark sidebar with a list of items: Projects, Leads, Milestones, Tasks, Sales, Tags (which is selected and highlighted in blue), General Settings, View Tags, Payment Methods, Email, User Roles, Tickets, and Other. At the top right are icons for notifications, a clipboard, and a user profile for 'Brian'. The main content area has a header 'Settings' and a breadcrumb 'APP > SETTINGS > TAGS'. It contains a single setting: 'Allow users to create new tags' with a checked checkbox. Below this is a 'Help Documentation' button and a red 'Save Changes' button.

From this page, you can specify whether users can add tags to items such as projects, tasks, etc.

View Tags

- Projects >
- Leads >
- Milestones >
- Tasks >
- Sales >
- Tags** > View Tags
- General Settings
- Payment Methods >
- Email >
- User Roles
- Tickets >
- Other >

Settings

APP > SETTINGS > TAGS

Search and filter tags

Date Created	Title	Created By	Resource Type	Resource ID	Action
06-27-2020	design-brief	Brian	Note	3	
06-22-2020	server-logins	Brian	Note	2	
06-22-2020	design-project	Brian	Project	14	
06-22-2020	another-here	Brian	Project	14	
06-21-2020	seo	Brian	Project	2	

The item that the tag was added to

Edit Tag

Delete Tag

From this page you can do the following:

- View, search all the tags used in the dashboard.
- Add new tags.
- Edit and delete tags.

16. Paypal Payment Gateway

You are here: [Main](#) □ [Settings](#) □ [16. Paypal Payment Gateway](#)

The PayPal settings page allows you to add Paypal as a payment method for your clients to use when paying for their invoices.

Information Required

- Email Address – This is your Paypal email address.
- Currency – The currency that your clients will pay in. You will need to enter a currency code that is supported by Paypal. For a full list of supported currency codes, [click here](#).
- Display Name – This is just the name/title that your clients will see when selecting this payment method.

The screenshot shows the 'Settings' section of the application, specifically the 'PAYPAL' configuration. The left sidebar lists various settings categories like Milestones, Tasks, Sales, Tags, and Payment Methods (with 'Paypal' selected). The main content area is titled 'Settings' and shows the following fields:

- Email Address***: info@example.com
- Currency* ⓘ**: USD
- Display Name* ⓘ**: Paypal
- Paypal IPN url* ⓘ**: http://dashboard.co.zw/api/palpay/ipn
- Sandbox Mode ⓘ**: An unchecked checkbox.
- Enable Payment Method**: An unchecked checkbox.

At the bottom, there's a note: "IMPORTANT: First read the application documentation, for clear, step by step instructions." and a red "Save Changes" button.

Important: Paypal IPN URL

The IPN URL allows PayPal to confirm a payment with the dashboard. Normally, the IPN URL is sent automatically to PayPal, during checkout. However, if your payments are not showing up in the dashboard, you may need to manually add the IPN URL, directly inside your PayPal Account.

Below are instructions on how to add this url inside your Paypal dashboard.

- Copy the IPN URL from inside your Grow CRM dashboard (as shown in the image above)
- Log in to your Paypal account as usual.
- Paste the URL shown below, in your browser window, and click enter.
 - https://www.paypal.com/cgi-bin/webscr?cmd=_profile-ipn-notify
- You will see a screen similar to the one shown below.
- Click on Choose IPN Settings
- Add the IPN URL that you copied from the dashboard
- Select Receive IPN messages (Enabled)
- Click Save

The screenshot shows the PayPal account dashboard. At the top, there are links for Log Out, Help, and Security, along with a search bar. Below the header is the classic blue and yellow PayPal logo. A navigation menu bar includes My Account, Send Money, Request Money, Merchant Services, Auction Tools, Products & Services, and Help. Underneath the menu, a secondary navigation bar offers Overview, Add Funds, Withdraw, History, Resolution Centre, and Profile. The main content area is titled "Edit Instant Payment Notification (IPN) settings". It contains a sub-instruction: "PayPal sends IPN messages to the URL that you specify below." Below this, a note says: "To start receiving IPN messages, enter the notification URL and select Receive IPN messages below. To temporarily stop receiving IPN messages, select Do not receive IPN messages below. PayPal continues to generate and store IPN messages until you select Receive IPN messages again (or turn off IPN)." A red box highlights the "Notification URL" input field, which contains the URL "http://yourdomain.com/api/palpay/ipn". Another red box highlights the "IPN messages" section, where the radio button for "Receive IPN messages (Enabled)" is selected. At the bottom of the form are two buttons: a red-bordered "Save" button and a "Cancel" button.

Sandbox Mode

Sandbox is a testing mode. This is a feature provided by Paypal, which allows you to carry out test transactions. For more information on Paypal Sandbox mode, [click here](#).

Note, this is just an additional feature, which is not required for you to start processing payments. Ensure that this button is not selected if you want to process real payments.

Enable Payment Method

Remember to check the (Enable Payment Method) box if you are ready to start using the Paypal payment gateway.

17. Stripe Payment Gateway

You are here: Main □ Settings □ 17. Stripe Payment Gateway

The Stripe settings page allows you to add Stripe as a payment method for your clients to use when paying for their invoices.

The screenshot shows the 'Settings' page under 'PAYMENT METHODS > STRIPE'. The left sidebar has a 'Payment Methods' section with 'Stripe' selected. The main form fields include:

- Publishable Key***: A text input field.
- Secret Key***: A text input field.
- Signing Key***: A text input field containing 'USD'.
- Display Name***: A text input field containing 'Credit Card'.
- Webhooks Url***: A text input field containing 'http://dashboard.co.zw/api/stripe/webhooks'.
- Enable Payment Method**: A checkbox.

At the bottom, there is a note: 'IMPORTANT: First read the application documentation, for clear, step by step instructions.' and a 'Save Changes' button.

Information Required

- Publishable Key – You can get this from inside your Stripe dashboard (details are given below).
- Secret Key – You can get this from inside your Stripe dashboard (details are given below).
- Signing Key – You can get this from inside your Stripe dashboard (details are given below).
- Currency – The currency that your clients will pay in. You will need to enter a currency code that is supported by Stripe. For a full list of supported currency codes, [click here](#).
- Display Name – This is just the name/title that your clients will see when selecting this payment method.

Publishable Key & Secret Key

To get your publishable key and your secret key, follow the steps given below:

- Whilst logged in your Stripe dashboard, click on Developers > API Keys

The screenshot shows the Stripe API keys page. On the left, there's a sidebar with links like Home, Payments, Balances, Customers, Connected accounts, Products, Reports, Developers (which is selected and highlighted with a red box), API keys (also highlighted with a red box), Webhooks, Events, and Logs. Below the sidebar are two toggle switches: 'Viewing test data' (which is off) and 'Settings'. The main content area has a 'TEST DATA' button at the top right. It displays 'API keys' and a note about viewing test API keys. A 'Standard keys' section lists two entries: 'Publishable key' with token 'pk_test_...' and 'Secret key' with token 'sk_test_...'. Both tokens are highlighted with red boxes. Below this is a 'Restricted keys' section which is currently empty. At the bottom right of the main area is a '+ Create restricted key' button.

Webhooks URL

Important: Stripe Webhooks URL

You must copy the Stripe Webhooks URL from your Grow CRM dashboard and add it inside your Stripe dashboard. Stripe will use this url to communicate with your Grow CRM dashboard.

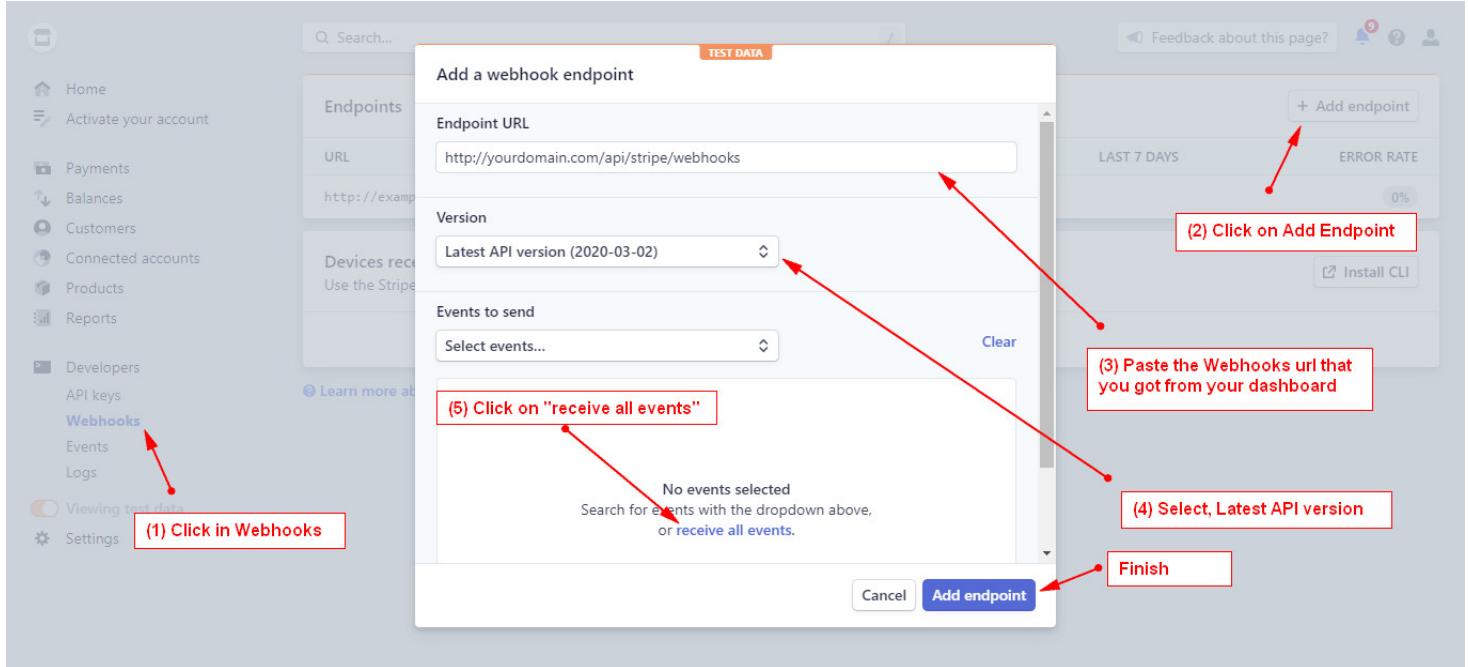
If you do not complete this step, payments will not be processed correctly.

Below are instructions on how to add this url inside your Stripe dashboard.

Whilst logged in your Stripe dashboard, do the following (also illustrated on the image below)

- Click on Developers > Webhooks

- Click on Add endpoint
- A popup window will open
- Copy the Webhooks URL from your Grow CRM dashboard and past it in the Endpoint URL field
- Select the Latest API version
- Click on receive all events
- Save



Signing Key

After you have added the Webhooks URL as shown above, you will now need to get the Signing Key given for that Webhook.

Follow the steps below to get your webhooks signing key

- Whilst logged in your Stripe dashboard, click on Developers > Webhooks
- You will now see a section title Endpoints.
- In that section, you will see the webhook that you added in the previous set (above)
- Click on the webhook
- On the next screen, you will see your Signing Secret key. Copy it and paste it inside your Grow CRM dashboard.

Enable Payment Method

Remember to check the (Enable Payment Method) box if you are ready to start using the Stripe payment gateway.

18. Email Settings

You are here: [Main](#) □ [Settings](#) □ [18. Email Settings](#)

The email settings section, allows you to change various aspects of how the Dashboard handles email. Below are the various settings and their explanations.

General Settings

The screenshot shows the 'General Settings' page under the 'Email' section of the settings menu. The left sidebar lists various settings categories like Projects, Leads, Milestones, Tasks, Sales, Tags, Payment Methods, Email (selected), Email Templates, SMTP Settings, User Roles, Tickets, and Other. The main content area shows fields for 'System Email Address' (info@example.com), 'System From name' (Dashboard Inc), and 'Send email using' (Sendmail). A 'Help Documentation' button and a 'Save Changes' button are at the bottom right. The top right corner shows a user profile for Brian.

On the page shown above, you will be able to apply the following settings:

- System Email Address – This is the email address that emails will be sent as, i.e. “from & reply to” email address
- System From Name – This is the name that is displayed in the receivers inbox (e.g. From ABC Inc)
- Send Email Using – This determines how emails are actually delivered.
 - Sendmail – This is the built-in email delivery application that runs on your web hosting providers server. This is the easiest way to get started. If you select this method, you will not need to do anything further.
 - SMTP – This is another type of email delivery application. Your web hosting provider may also allow you to send emails via this method. You will require SMTP logging in credentials, which your web hosting provider can give you. With SMTP, you are also able to use third-party email delivery services such as Sendgrid or Mailchimp

Note: If you decide to use SMTP as your email delivery option, you must also follow the steps shown in

the next section below.

SMTP EMAIL DELIVERY SETTINGS

This page allows you to configure your SMTP email delivery service.

The screenshot shows the 'SMTP Settings' page within a software application. On the left is a dark sidebar menu with items like 'Projects', 'Leads', 'Milestones', 'Tasks', 'Sales', 'Tags', 'Payment Methods', 'Email' (which is expanded to show 'General Settings', 'Email Templates', and 'SMTP Settings'), 'User Roles', 'Tickets', and 'Other'. The 'SMTP Settings' item is highlighted with a blue border. The main content area has a light gray background. At the top right are icons for a bell (notifications), a user profile (Brian), and a red circle with a plus sign (add). Below these is the title 'Settings' and the path 'APP~ > SETTINGS > EMAIL > SMTP SETTINGS'. The configuration form contains fields for 'SMTP Host' (empty), 'SMTP Port' (empty), 'Username' (empty), 'Password' (empty), and 'Encryption' (set to 'None'). A red 'Save Changes' button is at the bottom right.

All the information required on the screen above will normally come from your web hosting provider or your mail delivery service provider (e.g. MailChimp or Sendgrid).

Note: If you are using SMTP as your delivery method, be sure to enable SMTP in the Email General Settings page.

19. Email Templates

You are here: Main □ Settings □ 19. Email Templates

The email templates section, allows you to modify the content and formatting of the various emails that the application sends out (e.g. Welcome Emails, Project Notification Emails, etc).

Editing Email Templates

To edit an email template, you must first select it from the drop-down list. The templates are named in a way that makes them easy to identify (e.g. New User Welcome (all)). The (all) part in the name, identifies if the email template is used for email being sent to client users, team members, or both.

The screenshot shows the 'Email Templates' page in the application settings. A red box highlights the dropdown menu where 'New User Welcome - (All)' is selected. Another red box points to the 'Subject' field containing 'Your Account Details'. A third red box points to the 'Email Body' rich text editor, which contains the text 'Welcome' and 'Hi {first_name}, Your account has been created. Below are your login details.' Below the editor, there's a table with 'Username' and 'Password' fields, each containing placeholder variables like '{username}' and '{password}'. At the bottom, a note says 'You will be asked to change your password the first time you log in.' On the left sidebar, under the 'Email' section, 'Email Templates' is selected. On the right, there are sections for 'Template Variables~' (with placeholders for first_name, last_name, username, password) and 'General Variables~' (with placeholders for our_company_name, todays_date, email_signature, email_footer, dashboard_url). A note at the bottom right explains that email variables are dynamically generated for the recipient. A 'Save Changes' button is at the bottom right.

Start by selecting the email template that you would like to edit

You will be able to edit the subject line and also the content

New User Welcome - (All)

Subject

Your Account Details

Email Body

Welcome

Hi {first_name},

Your account has been created. Below are your login details.

Username {username}

Password {password}

You will be asked to change your password the first time you log in.

Enabled~

Save Changes

Template Variables~

{first_name}
{last_name}
{username}
{password}

General Variables~

{our_company_name}
{todays_date}
{email_signature}
{email_footer}
{dashboard_url}

Email variables are dynamically generated by the system for the particular email.
For example, {first_name} will automatically add the first name of the user who is receiving the email

20. User Roles

You are here: Main □ Settings □ 20. User Roles

User roles define the permission levels that a user in that role will have when using the application.

On the roles settings page, you will be able to create new roles, edit or delete existing roles.

A user role grants very specific permissions for a particular resource in the dashboard. This means you can control exactly how much access a user will have on a give application resource (e.g. Projects)

Roles are for team members only. Client user's roles are predefined in the application and cannot be modified at this time.

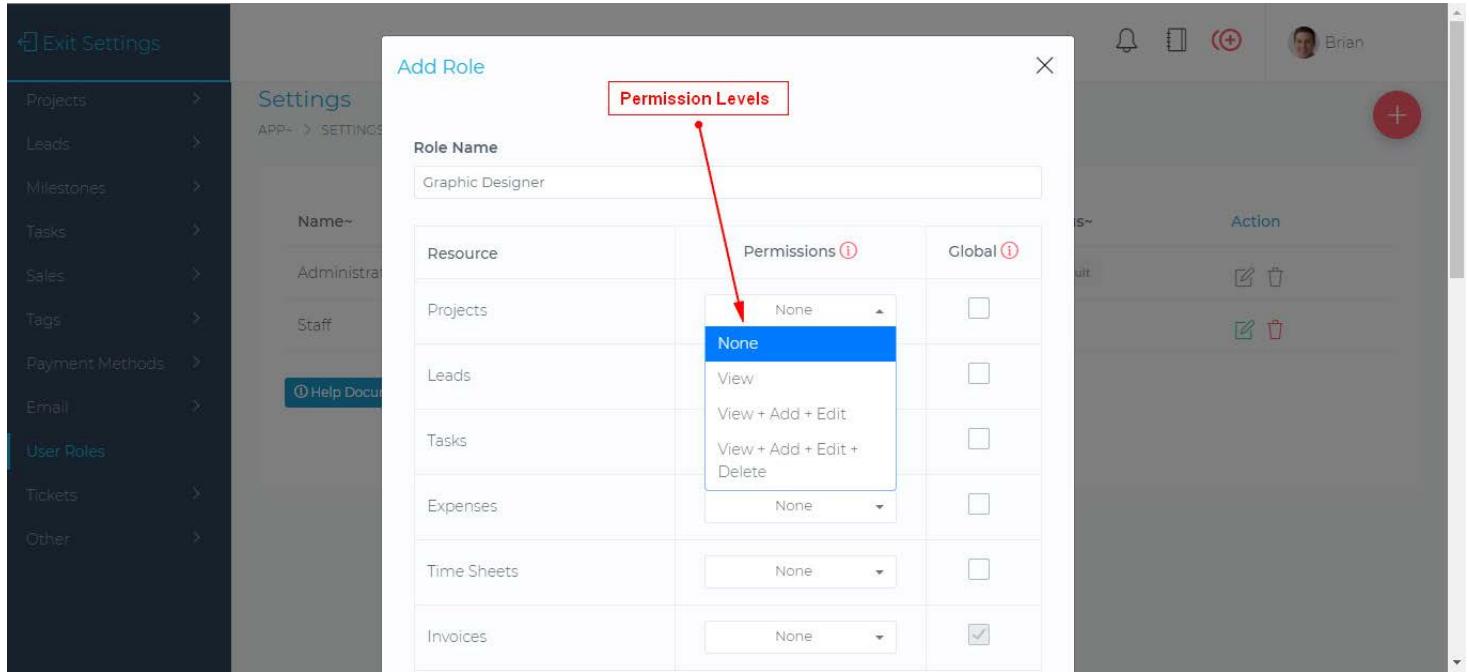
Once you have created a user role, you will be able to use/specify this role when creating or editing team members' profiles.

The screenshot shows the 'User Roles' section of the application settings. On the left, a sidebar lists various settings categories like Projects, Leads, Milestones, etc., with 'User Roles' currently selected. The main area is titled 'Settings' and shows the 'USER ROLES' page. It displays a table of roles:

Name~	Active Users~	Type~	Status~	Action
Administrator ★	3	team	Default	Edit Delete
Staff	3	team	---	Edit Delete

A red box highlights the 'Administrator' row, with a red arrow pointing to it from the text 'Default system role. This role cannot be edited or deleted'. Another red box highlights the 'Create a new user role' button in the top right, with a red arrow pointing to it from the text 'Create a new user role'. A third red box highlights the 'Edit a role' and 'Delete a role' buttons for the 'Staff' row, with red arrows pointing to them from the respective text labels.

Permission Levels



There are 4 permission levels that a role can grant on a particular resource:

1. None – This user will have no access to the resource. They will not see the resource and if the resource has a menu like (like Projects), then that menu link will also be hidden from the user.
2. View – The user will only be able to view the resource. They will not be able to make any changes to it.
3. View + Add + Edit – The user will be able to view and make changes to the resource. The user will also be able to delete the resource
4. View + Add + Edit + Delete The user will have the same permissions as (3) above. Additionally, they will also be able to delete the resource.

IMPORTANT: Role permissions by default, only apply to a resource that a user has been assigned to or a resource that the user has created themselves. If you want the role to grant permissions to all resources of that type, you must click on the Global option.

The global options grants admin level permission on a particular resource.

22. Tax Settings

You are here: Main □ Settings □ 22. Tax Settings

The tax settings page allows you to manage the various tax rates that will be available when creating or editing invoices. You can create as many tax rates as required by your country.

Note: Any changes made to tax rates on this page, will not affect invoices that have already been created.

Exit Settings

Sales

Invoices

Tax Rates

Estimates

Expenses

Product Units

Tags

Payment Methods

Email

User Roles

Tickets

Other

Settings

APP > SETTINGS > SALES > TAX RATES

Add a new tax rate

Name	Rate	Created By	Action
Sales Tax	15.00%	Brian	
VAT	10.00%	Brian	

Edit tax rate

Delete tax rate

23. Knowledge Base

You are here: [Main](#) □ [Settings](#) □ [23. Knowledge Base](#)

The knowledge base section allows you to manage your knowledge base.

General Settings

From this page, you can set the following information;

- Order article by
 - This sets the ordering of knowledge base articles. For more direct control, you can set your ordering to Article Title – (Ascending Order). You can then name your articles as follows:
 - 1. Some example title
 - 2. Another example title
 - 3. Yet another example title

The screenshot shows the 'General Settings' page under the 'Knowledgebase' section of the settings menu. The left sidebar lists various settings categories like Tasks, Sales, Tags, etc., with 'Knowledgebase' expanded to show 'General Settings' selected. The main content area is titled 'Settings' and shows the 'Order articles by' section with a dropdown menu set to 'Article Title - (Ascending Order)'. There are 'Help Documentation' and 'Save Changes' buttons at the bottom. The top right corner shows user profile icons for Brian.

Knowledge Base Categories

From this page, you are able to create, edit and delete knowledge base categories.

- Tasks >
- Sales >
- Tags >
- Payment Methods >
- Email >
- User Roles
- Tickets >
- Knowledgebase** > Categories
- General Settings
- Other >

Settings

APP > SETTINGS > KNOWLEDGEBASE



Name	Date Created	Articles	Visible To	Created By	Action
FAQ	07-26-2020	1	Everyone	System	
Account	07-26-2020	3	Everyone	Brian	
Projects	07-26-2020	3	Client	Brian	
Billing	07-28-2020	3	Everyone	Brian	

[Help Documentation](#)

You are also able to do the following:

- Set the visibility of each category. If you have articles that you only want your team to view, you can create a category and set its visibility to team
- You can move articles from one category to another. You do this by clicking the edit icon
- View how many articles are currently in each category
- When enabled, the client will be able to view all expenses record on their project



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3. Nginx Server Instructions

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4. Common Installation Errors

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2. Editing Invoices

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1. Expenses Overview

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1. Expenses Overview

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1. Knowledge base overview

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22. Tax Settings

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23. Knowledge Base

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