Getting Started

- Introduction
- 1. Server Requirements
- 2. Installation
- 3. Nginx Server Instructions
- 4. Common Installation Errors
- 5. Installing Updates

Clients

- 1. Clients Overview
- 2. Create, Edit & Delete Client Accounts
- 3. Client Management

Projects

- 1. Projects Overview
- 2. Create Projects
- 3. Project Management

Tasks

- 1. Milestones
- 2. Tasks
- 3. Time Tracking

Leads

- 1. Leads Overview

Estimates

- 1. Estimates Overview
- 2. Creating Estimates
- 3. Editing Estimates

Invoices

- 1. Invoices Overview
- 2. Creating Invoices
- 2. Editing Invoices
- 4. Recurring Invoices
- 5. Invoice Products

Expenses

- 1. Expenses Overview

Tickets

- 1. Tickets Overview

Knowledge Base

- 1. Knowledge base overview

Settings

- 1. Main Settings

Errors & Debugging

- 1. Start Here - Error Logs

Introduction

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

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.

Grown 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

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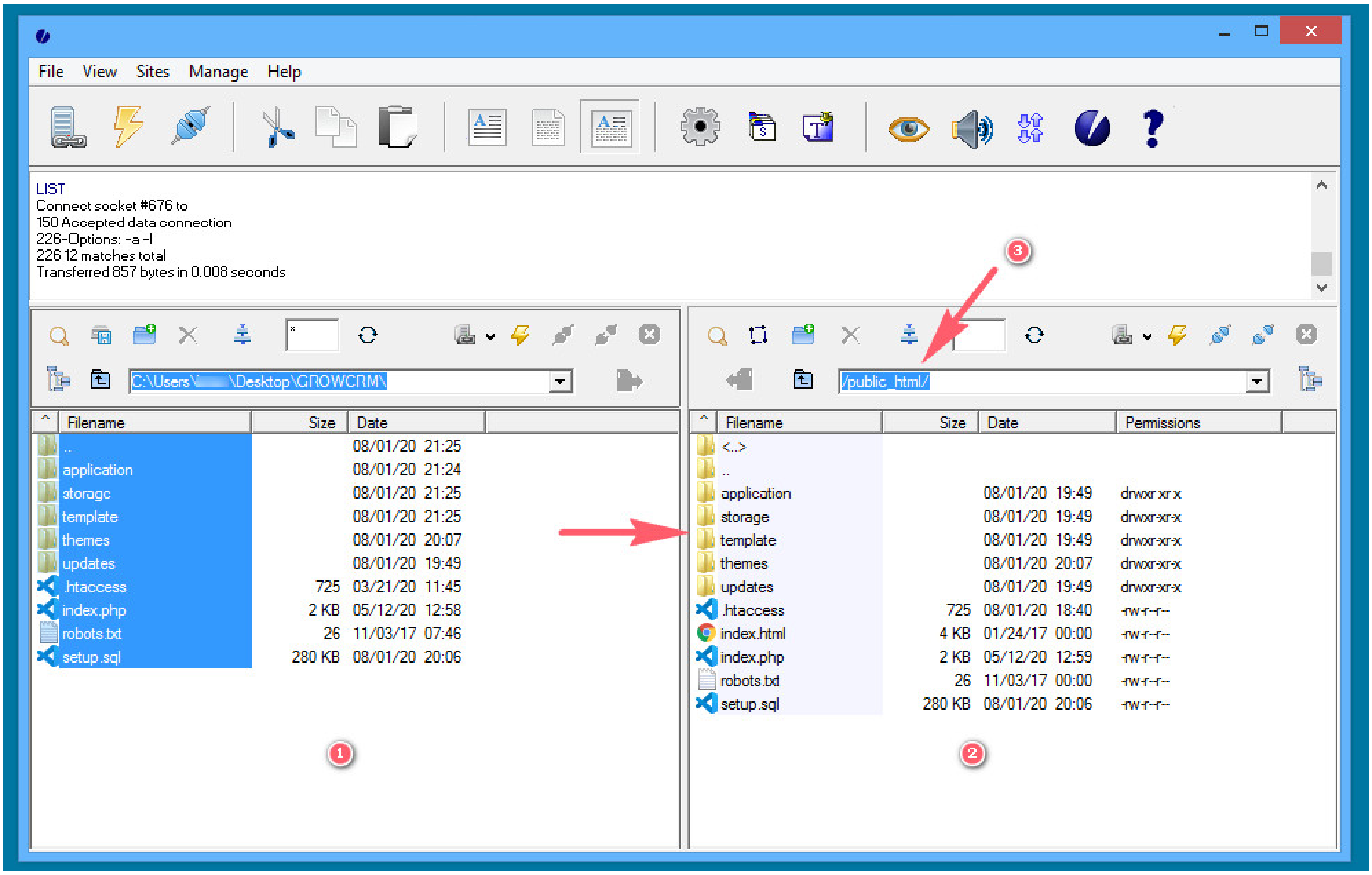
UPLOADING TO YOUR SERVER

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.

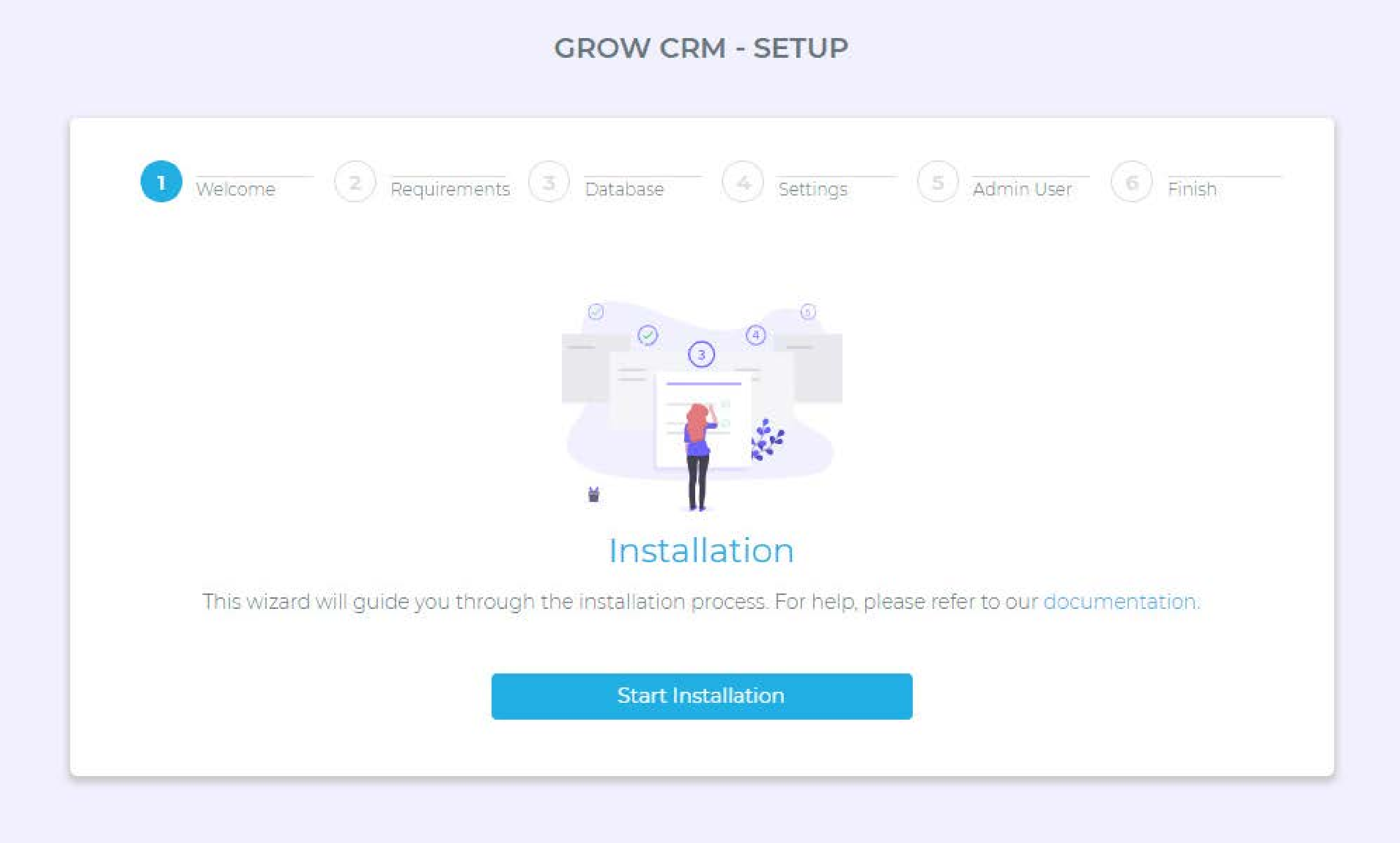
- 0755
- 0770
- 0777

```
THESE FOLDER MUST BE WRIATBLE

/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 WRIATBLE
/application/.env
```

SETUP WIZARD – WELCOME

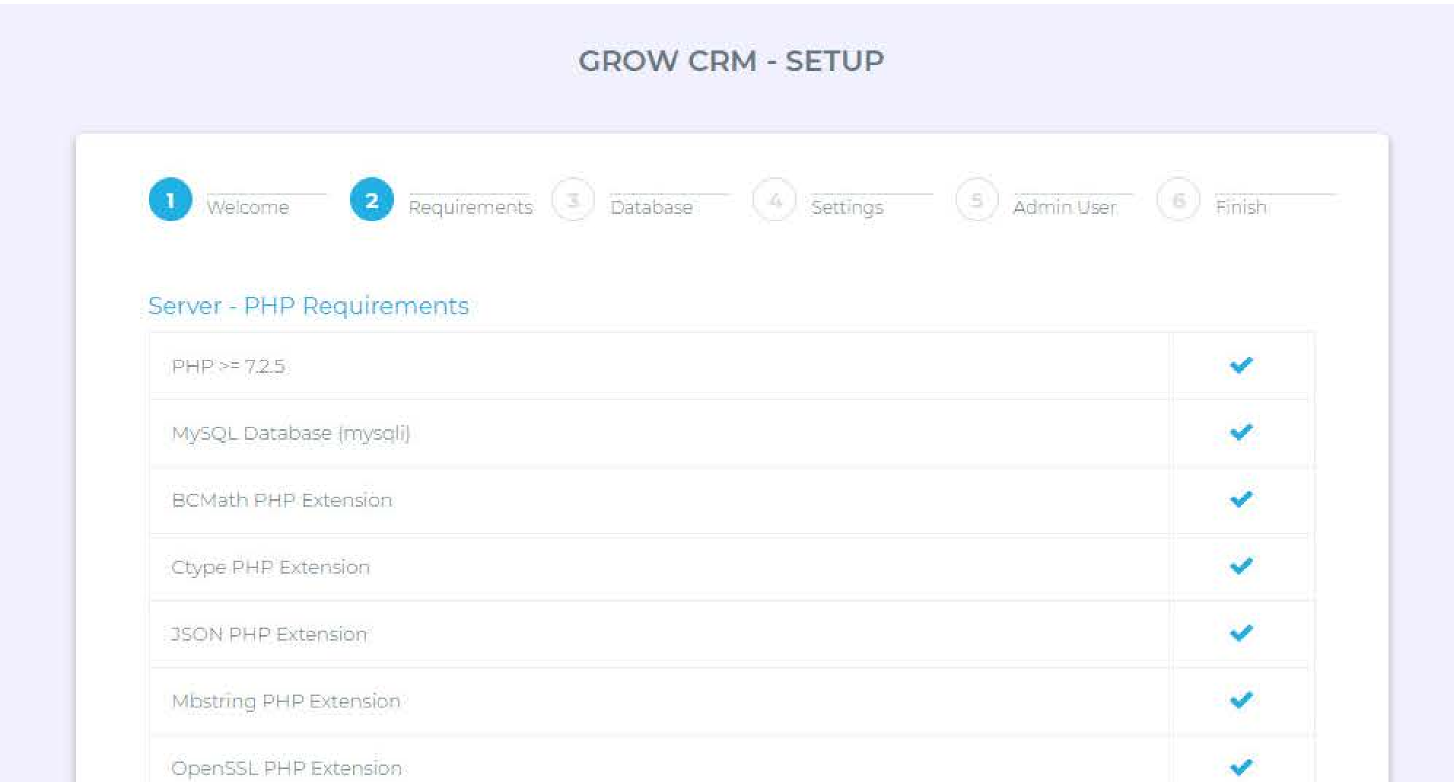
Once you have finished uploading your files, open your browser to the URL of your website. You will be presented with the setup wizard, as shown below. This is the first page of the setup wizard.



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.



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 an of the ones shown below (always try the lowest permission level first)

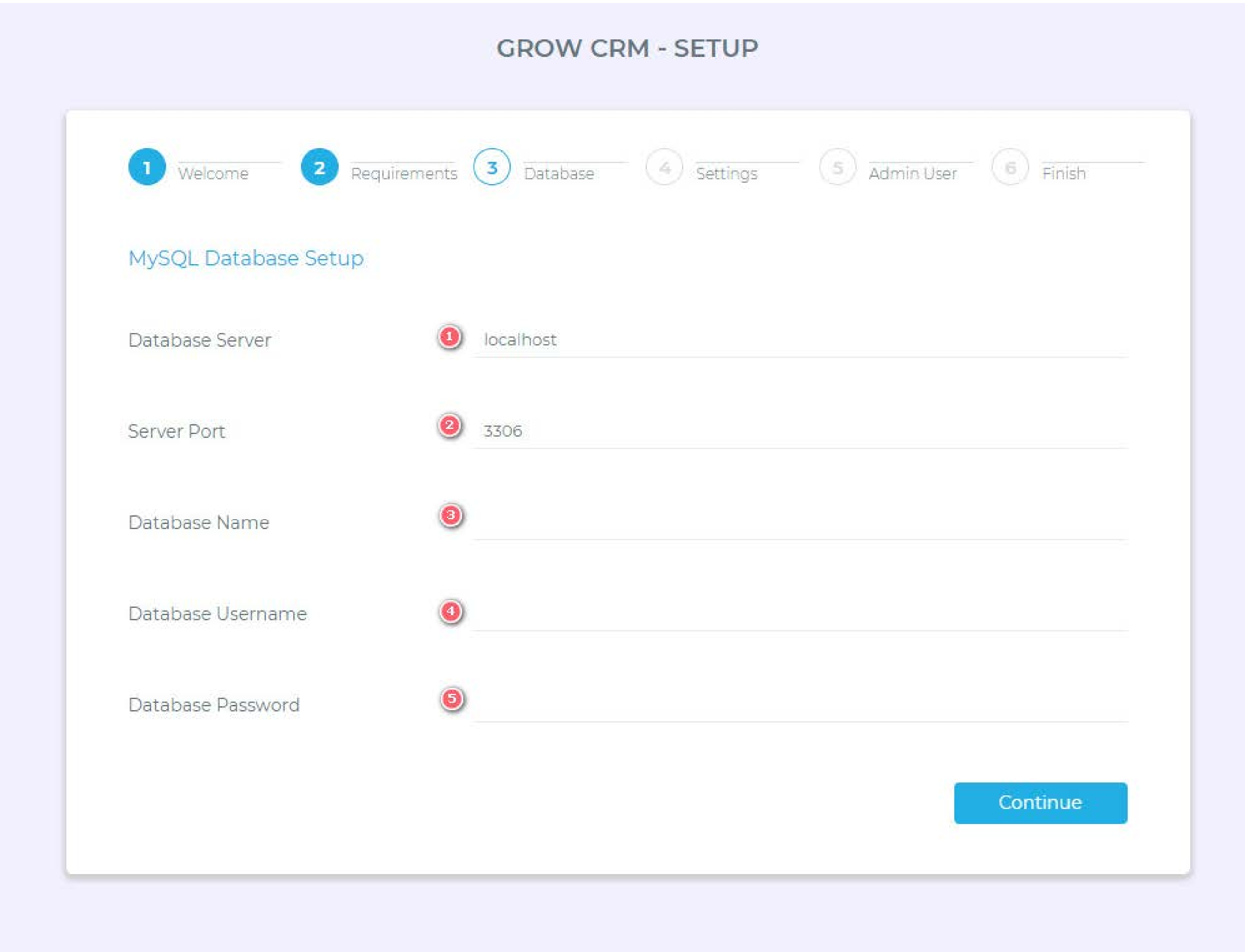
- 0755
- 0770
- 0777

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.

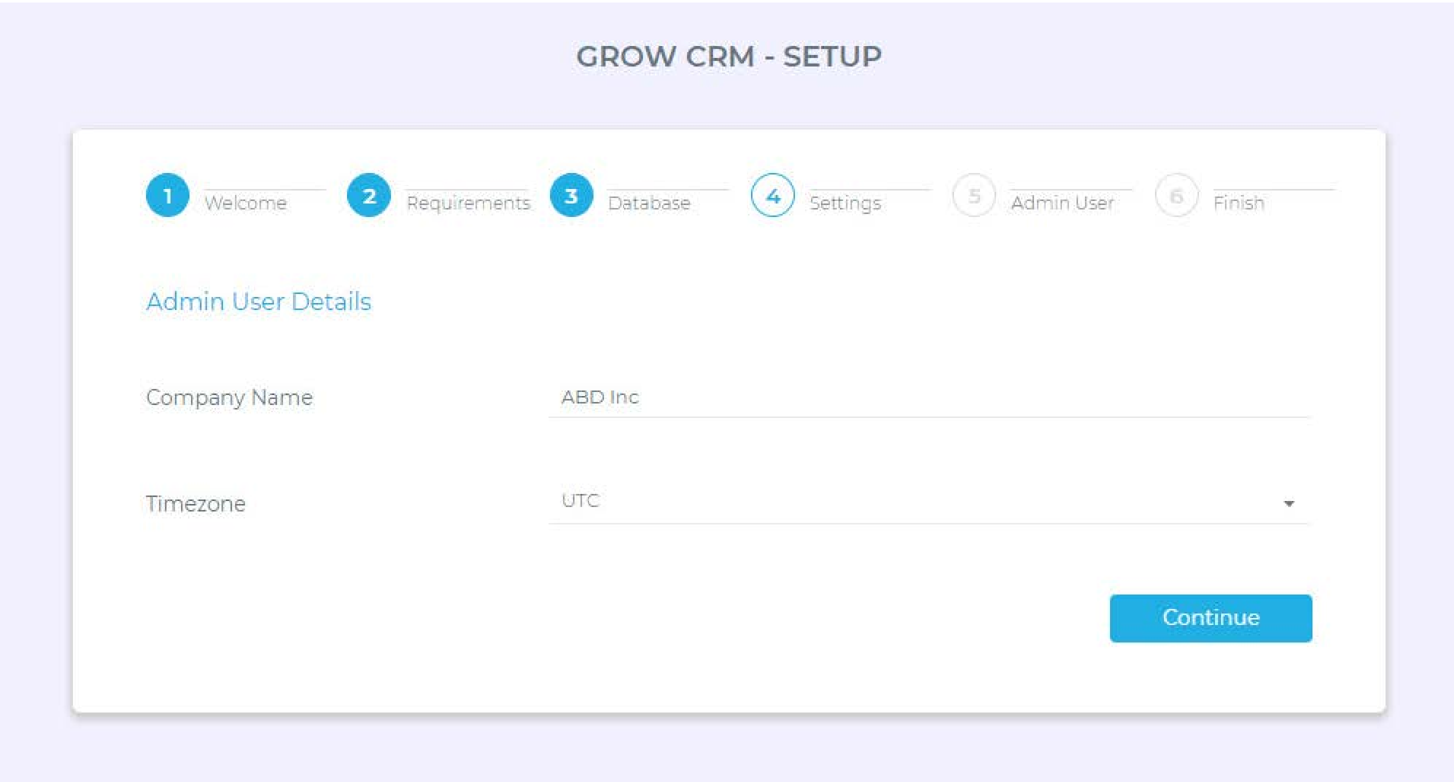
- Create a new MySQL database.
- Create a new database user.
- Add the database base use to the database.
- Grant full permissions to the database use, on the database.



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



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

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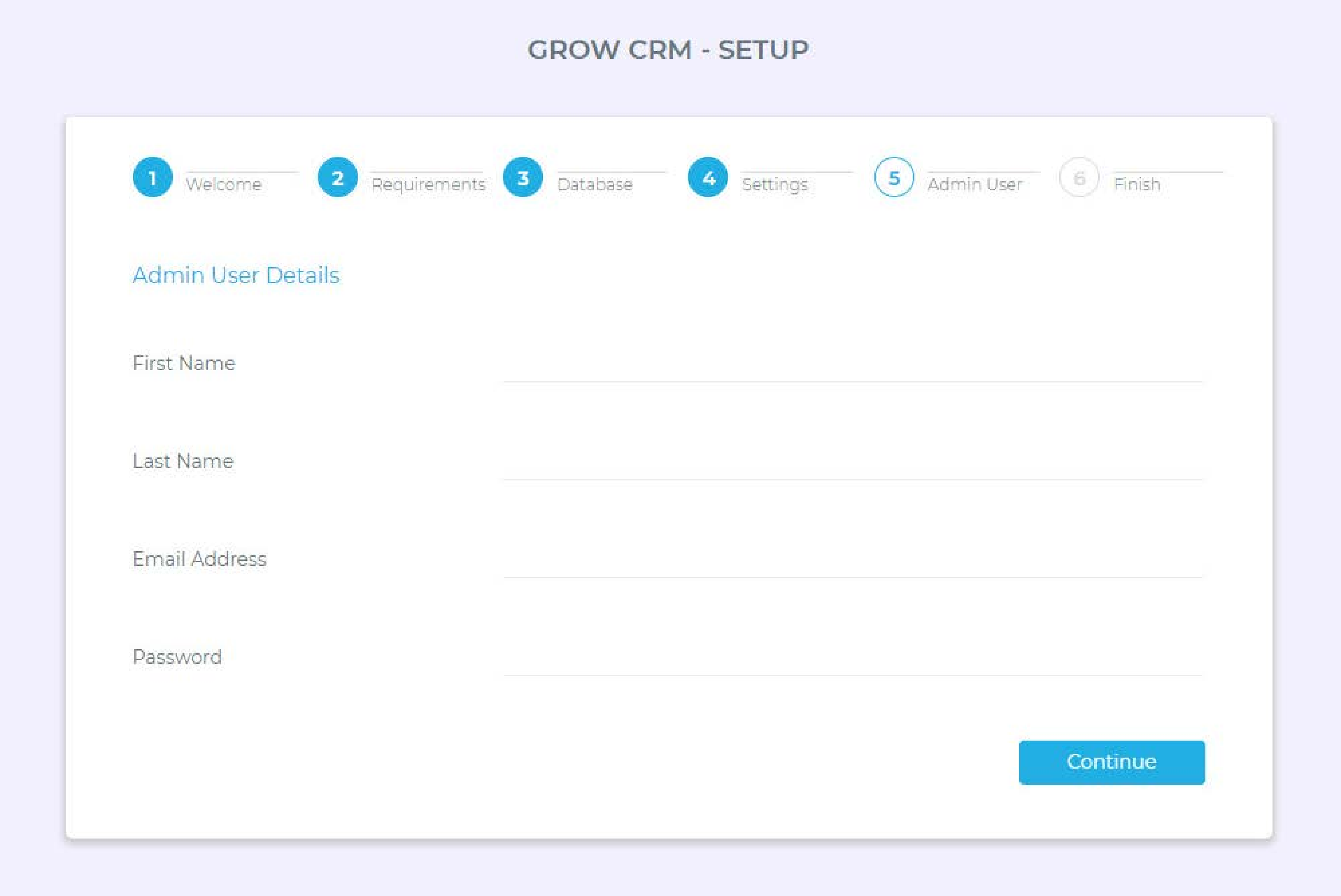
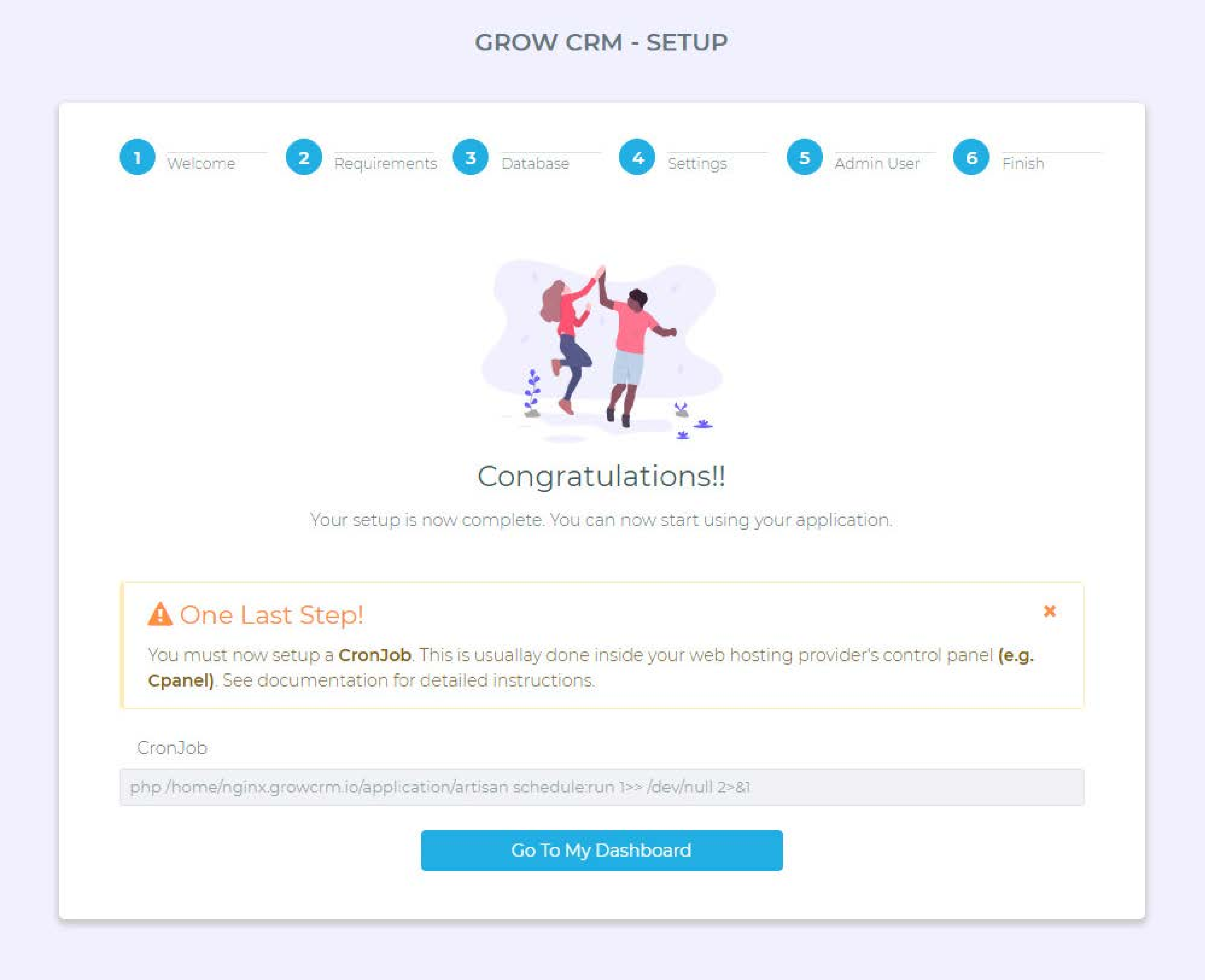
SETUP WIZARD – ADMIN USER DETAILS



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

SETUP WIZARD – FINISH SETUP



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 WRIATBLE

/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 WRIATBLE
```

```
/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

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 willknow because you will get a 500 Server Error.

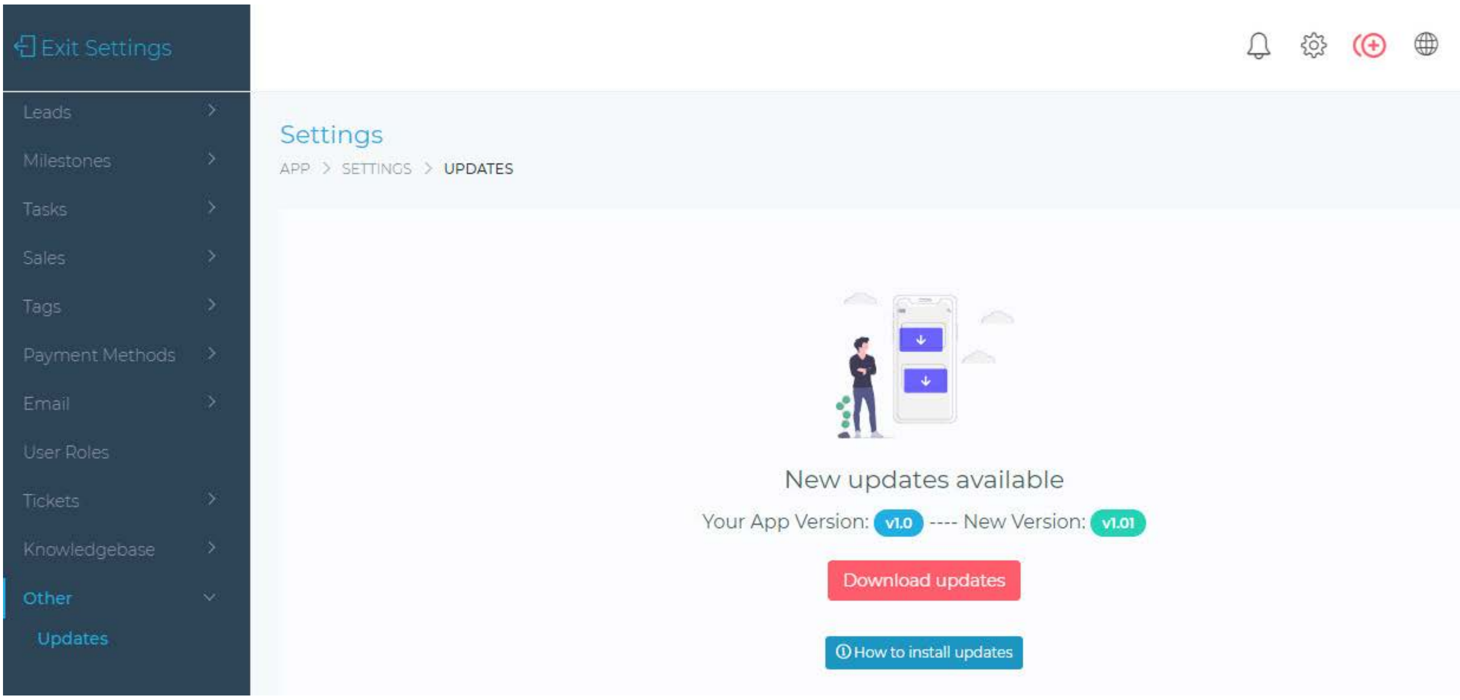
```
CHMOD THESE FOLDER - 0777

/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

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.

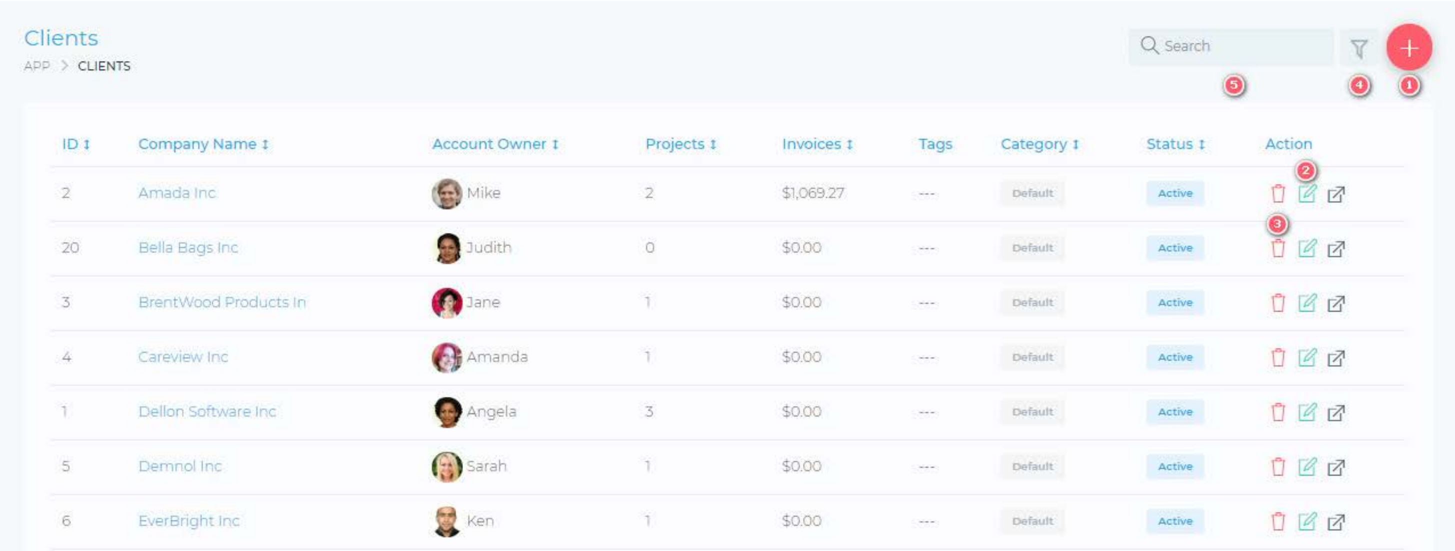


1. Clients Overview

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



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

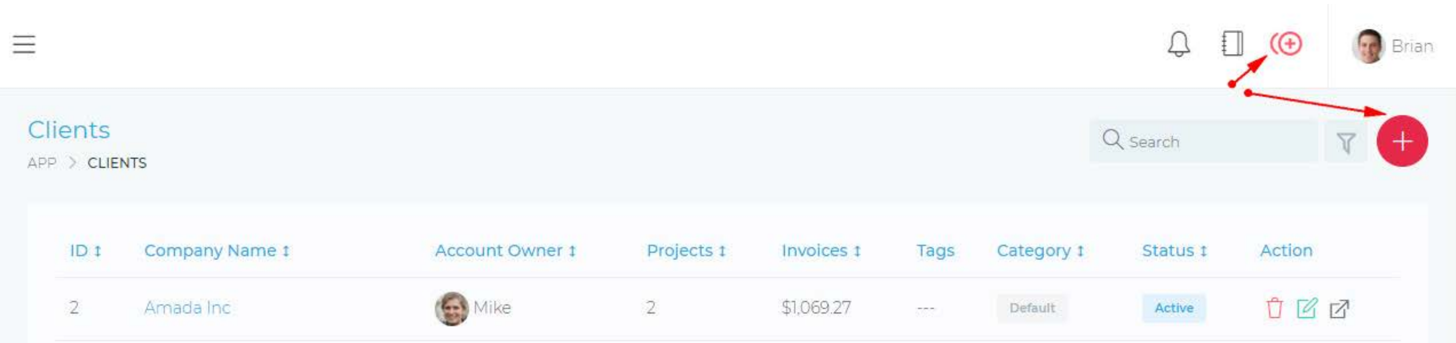
- (1) Create a new client account
- (2) Edit an existing client account
- (3) Delete a client account
- (4) Filter clients, using a detailed filter panel.
- (5) Search your projects, using the free text search box.
- See the most important summary information about your clients:
  - The client's ID
  - 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

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

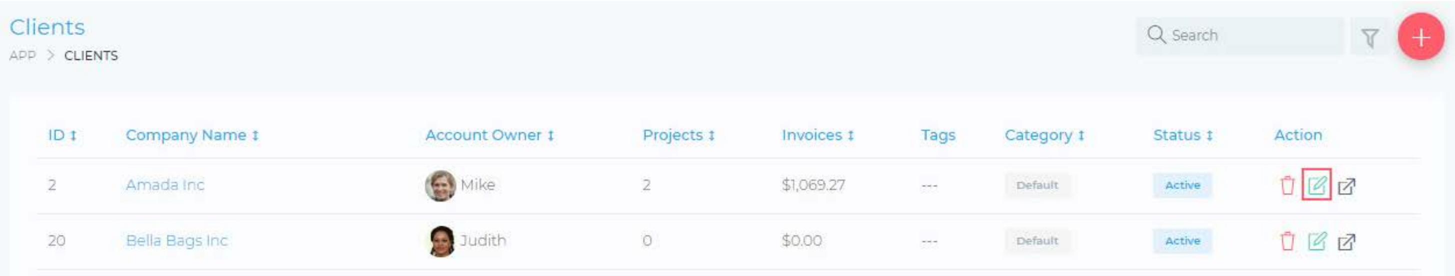
You can create a new client account by clicking on the Quick Add icon or by clicking on the action_column.



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.

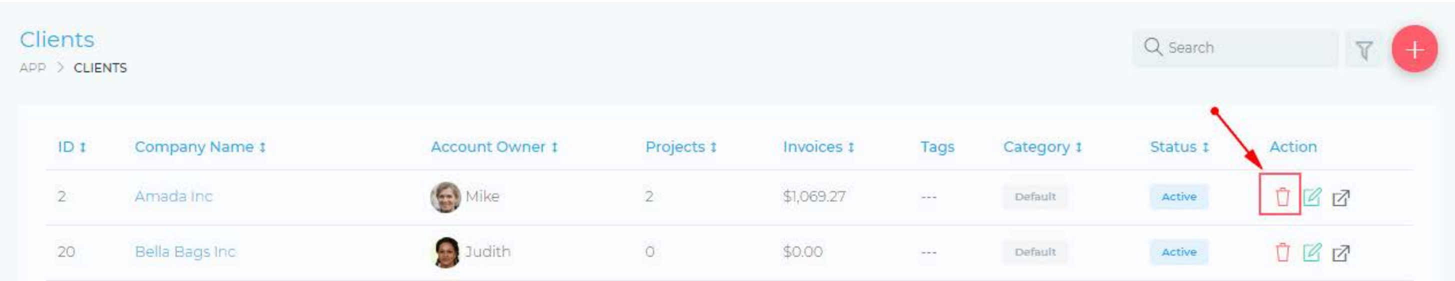
Editing A Client Account

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



Deleting A Client Account

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



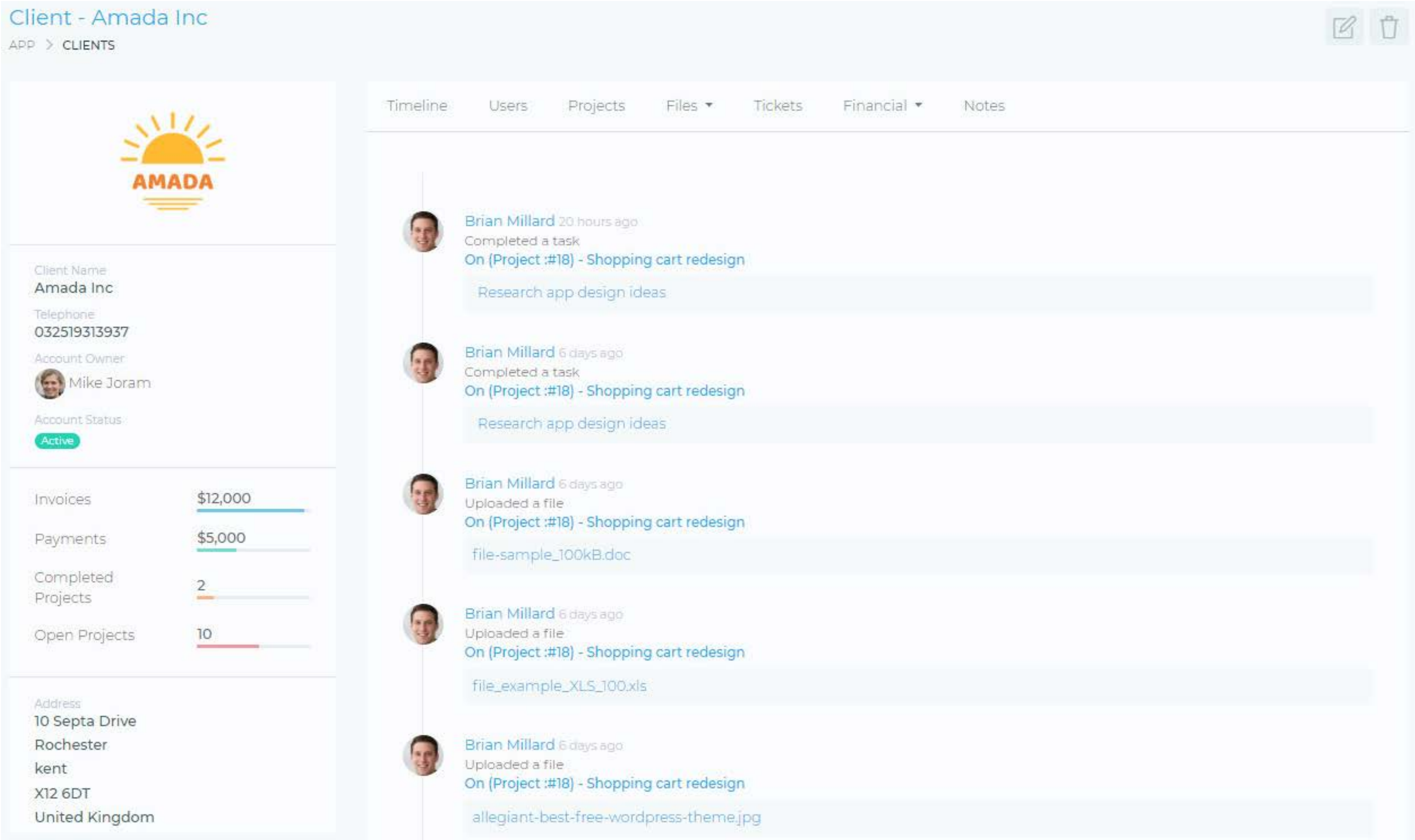
When you delete a client, all the items/resources linked to that client will also be deleted. The list below highlights some of the items that will be deleted.

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

3. Client Management

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.



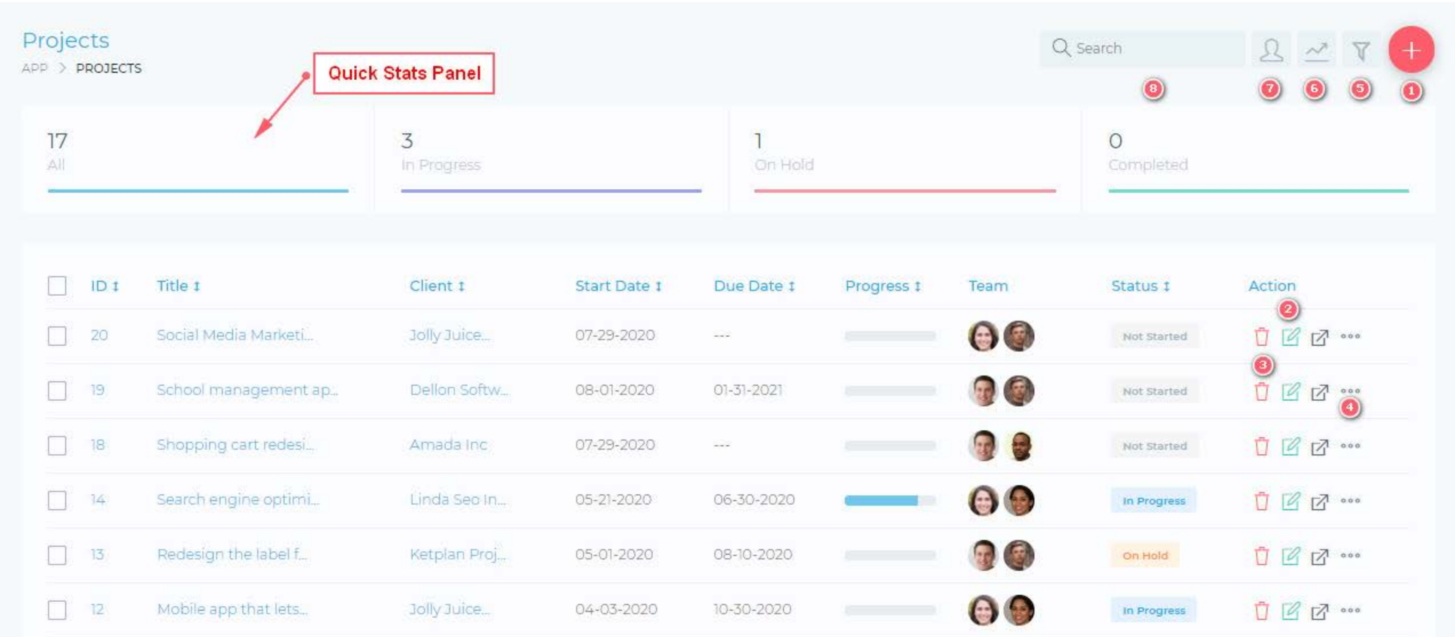
Client - Amada Inc
APP > CLIENTS
Timeline
Users
Projects
Files
Tickets
Financial
Notes
AMADA
Client Name
Amada Inc
Telephone
032519313937
Account Owner
Mike Joram
Account Status
Active
Invoices
$12,000
Payments
$5,000
Completed Projects
2
Open Projects
10
Address
10 Septa Drive
Rochester
kent
X12 6DT
United Kingdom
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

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



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.

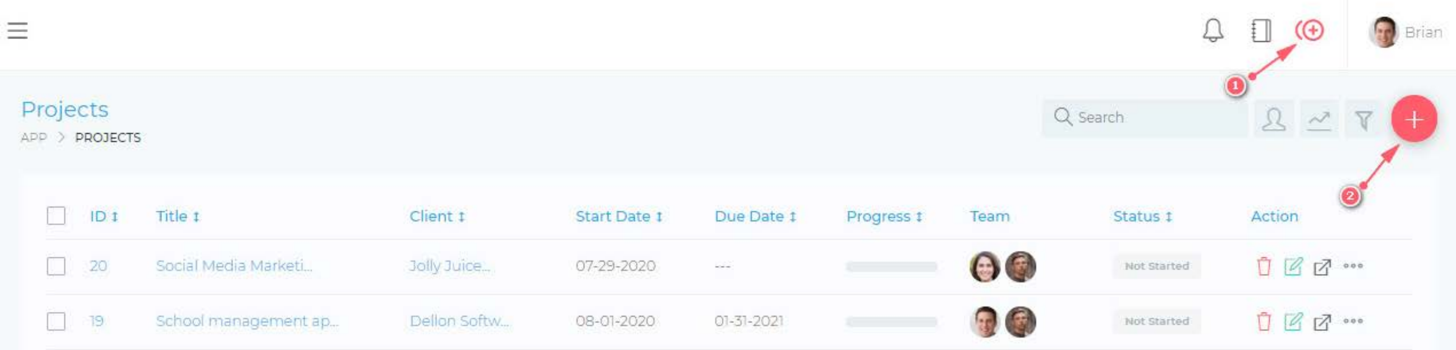
2. Create Projects

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

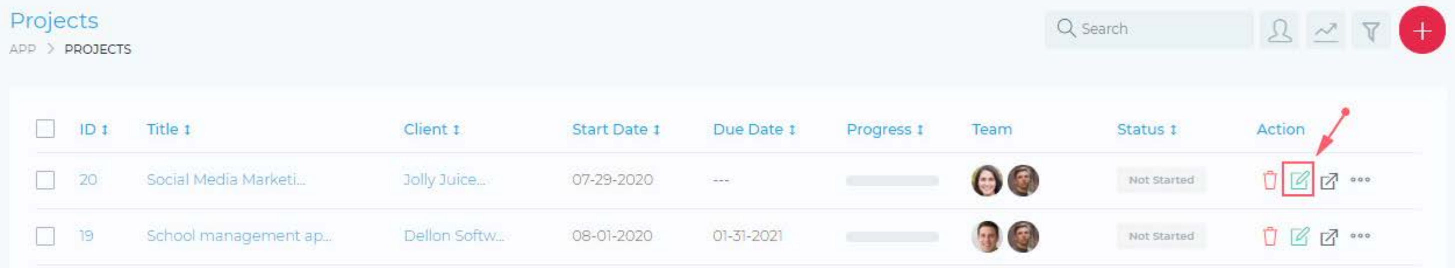
- Deadline
- Assigned users
- Project Manager
  - This user will have admin-level access to the project. They will be able to edit all the project's information and settings. They will also be able to view all user's tasks, assign users to tasks. The project manager is not able to delete the project.
- 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:



Deleting A Project

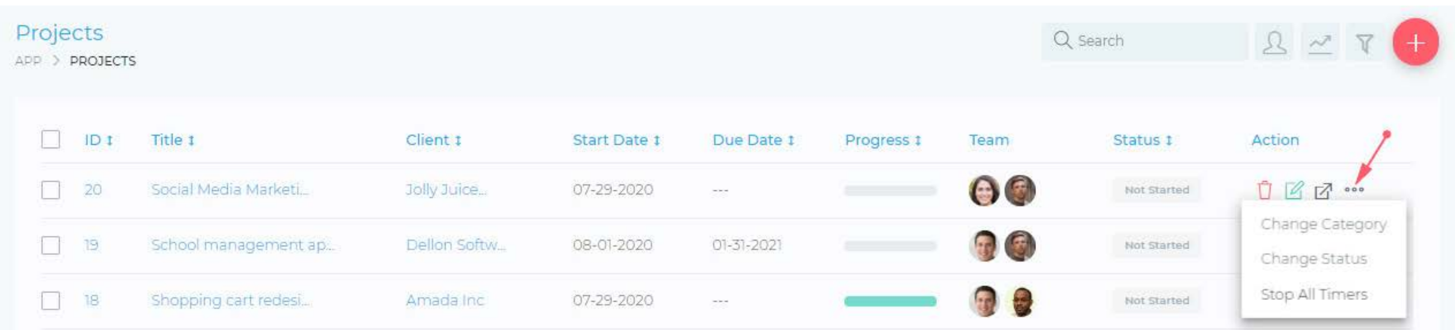
To delete a project, click on the Delete Icon, as shown in the image below:

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



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

100.0%
0 100

Amada Inc

Assigned

Project Manager

Start Date
07-29-2020

Due Date

Category
Web Develmopment

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

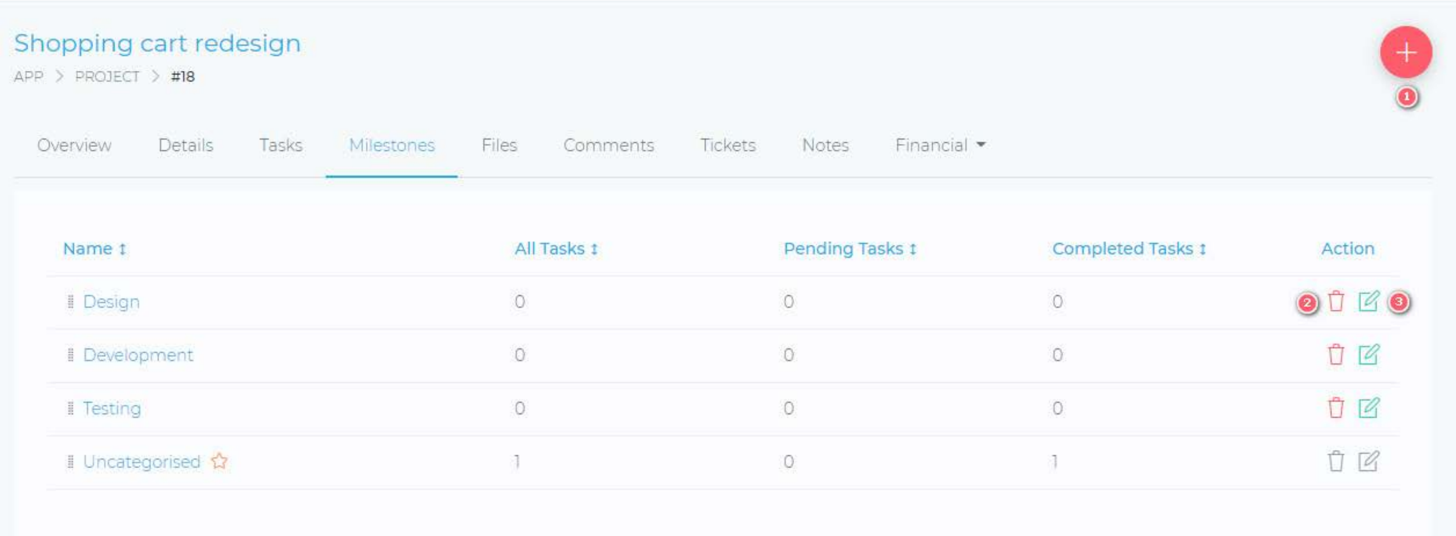
Brian Millard 6 days ago
Uploaded a file
allegiant-best-free-wordpress-theme.jpg

Brian Millard 1 week ago
Created a new project

1. Milestones

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.



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

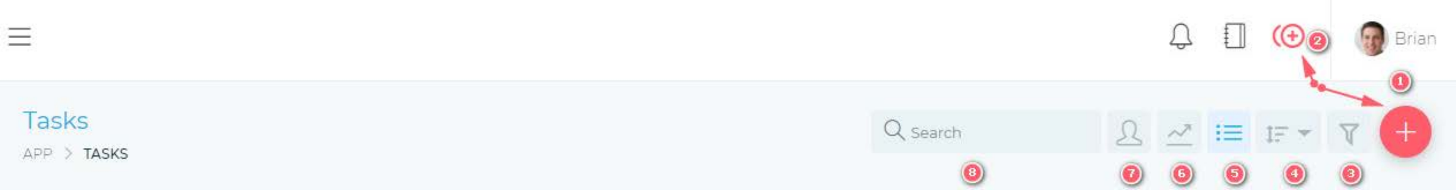
When a milestone is deleted, there is an option to delete all its tasks, or the tasks will automatically be moved into the uncategorized milestone.

2. Tasks

You are here: Main ▫ Tasks ▫ 2. Tasks

Project Tasks allow you to structure your project work, by splitting the wok 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.



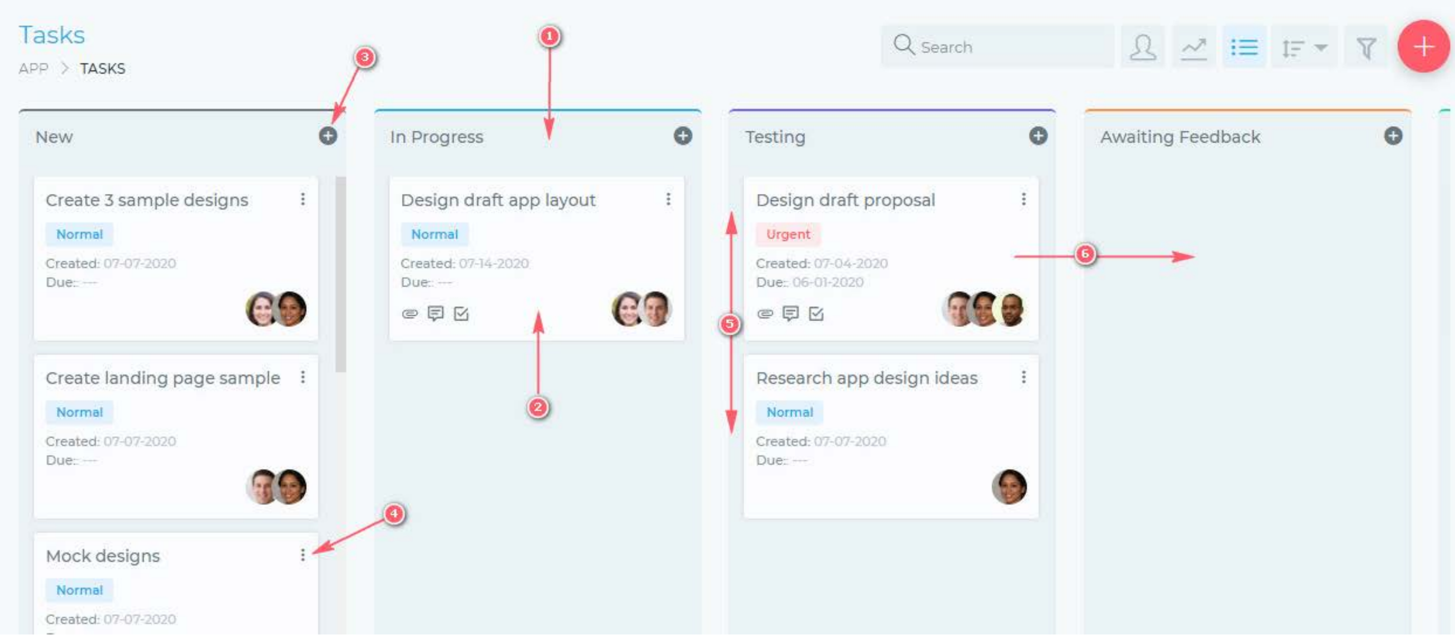
Using the main actions panel (as shown above) you are able to do the following:

- (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.

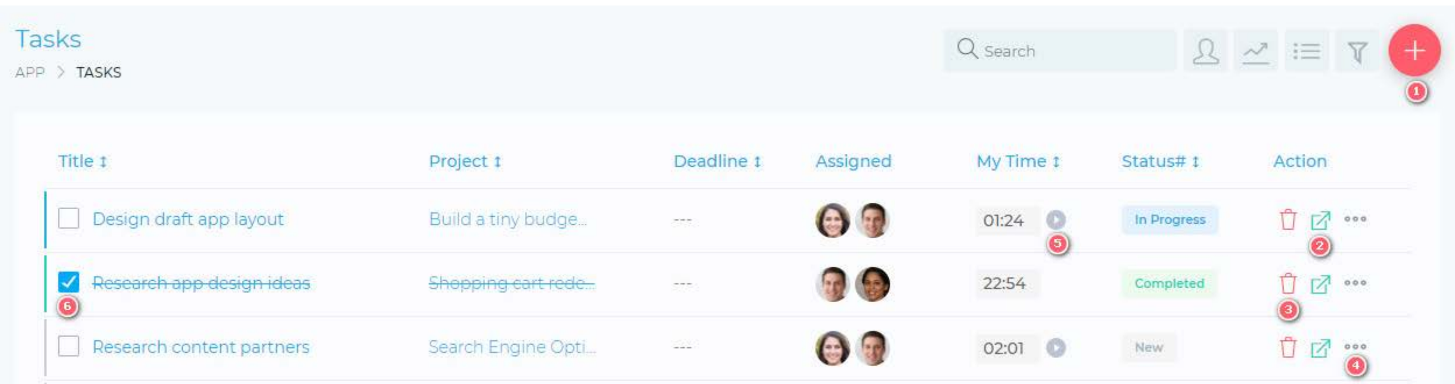


The kanban view has the following features:

- (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.



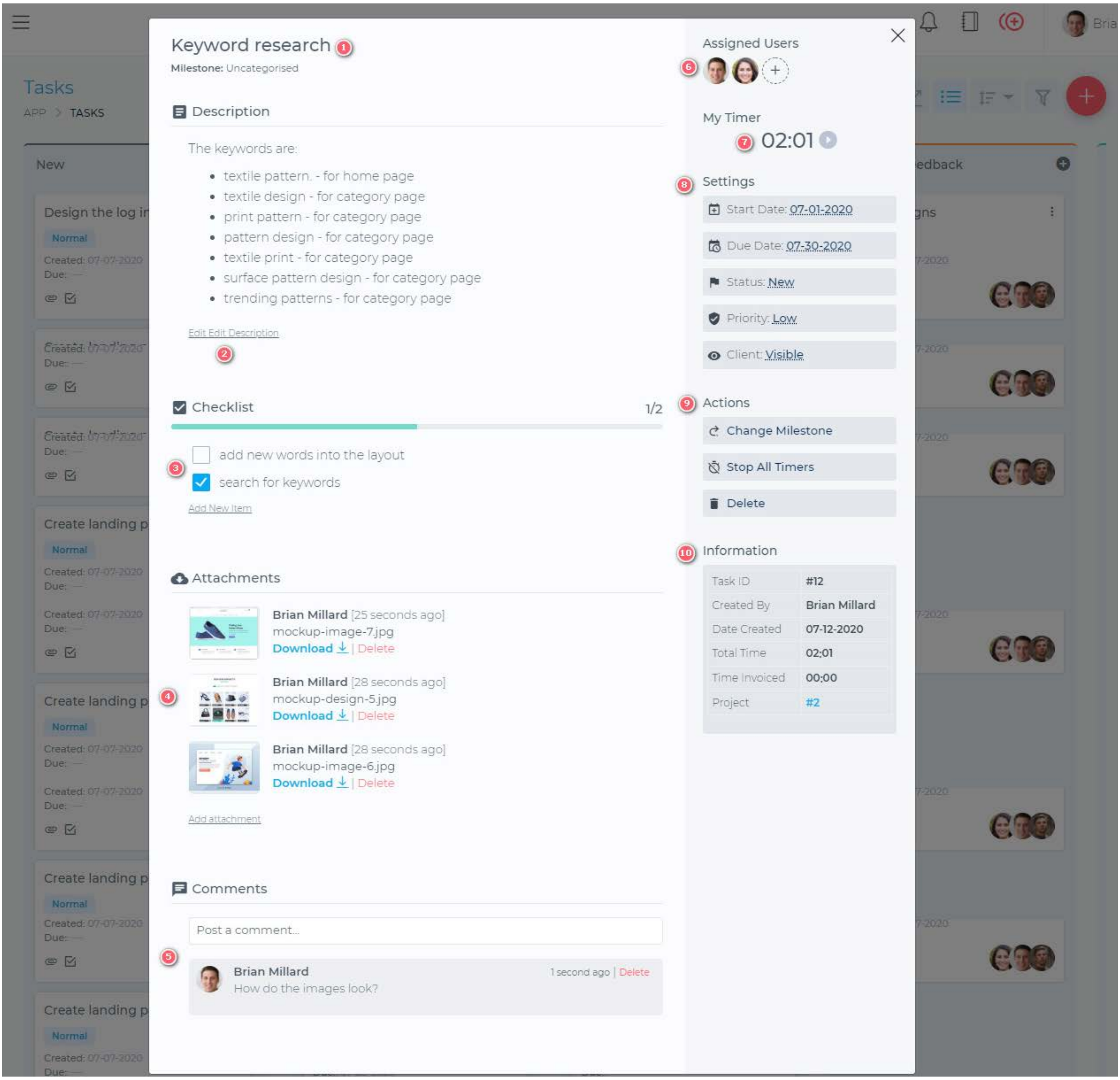
From the table list view, you are able to do the following:

- (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:



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

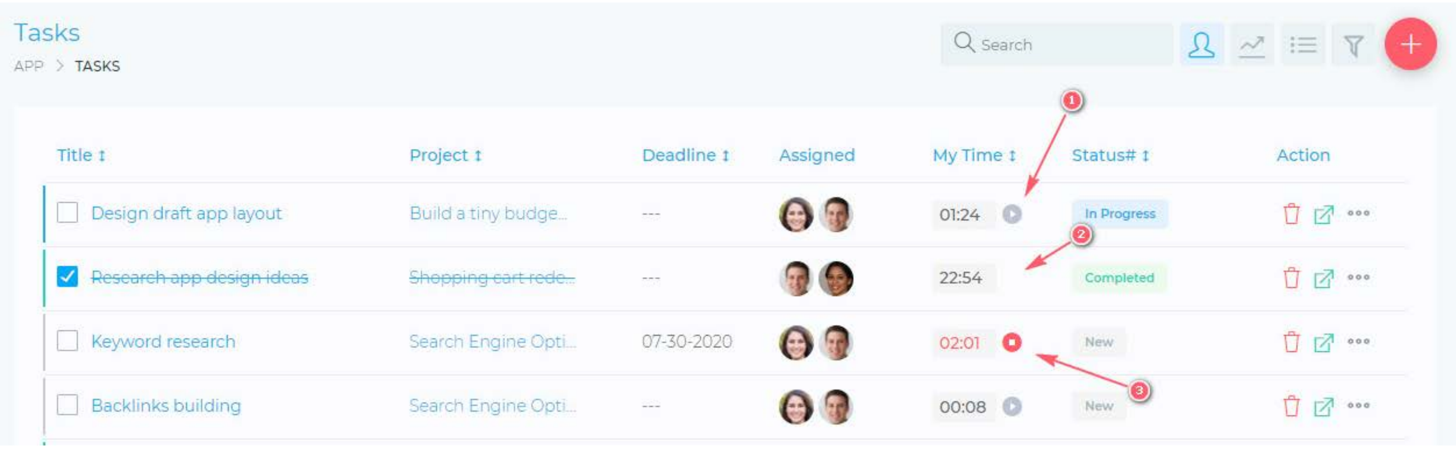
The time tracking feature of Grow CRM enables you and your team to keep track of the amount of time that you spend working on your projects.

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

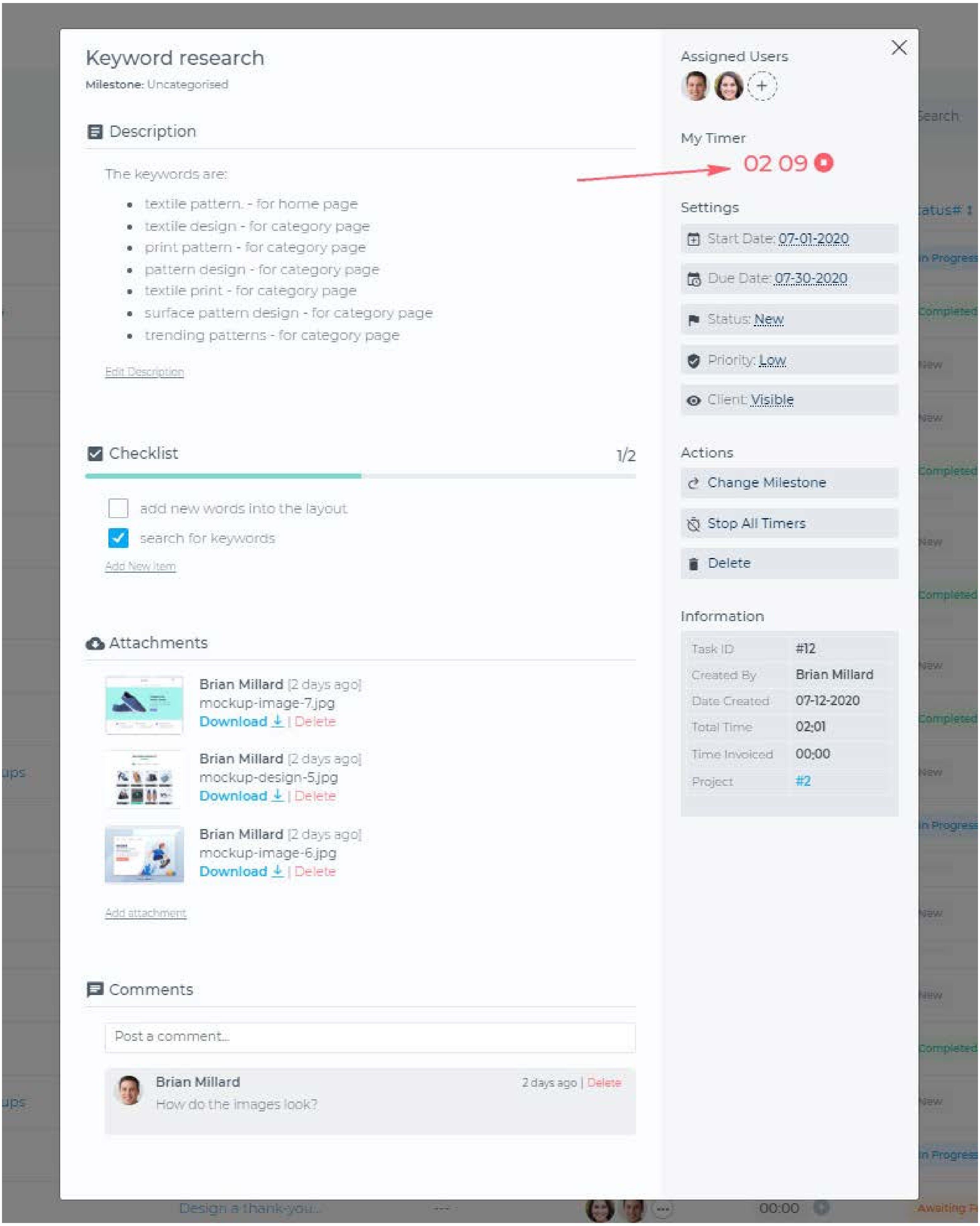
When you are viewing tasks that you are assigned to, you will notice that they will have a timer icon, as shown below (1).



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.

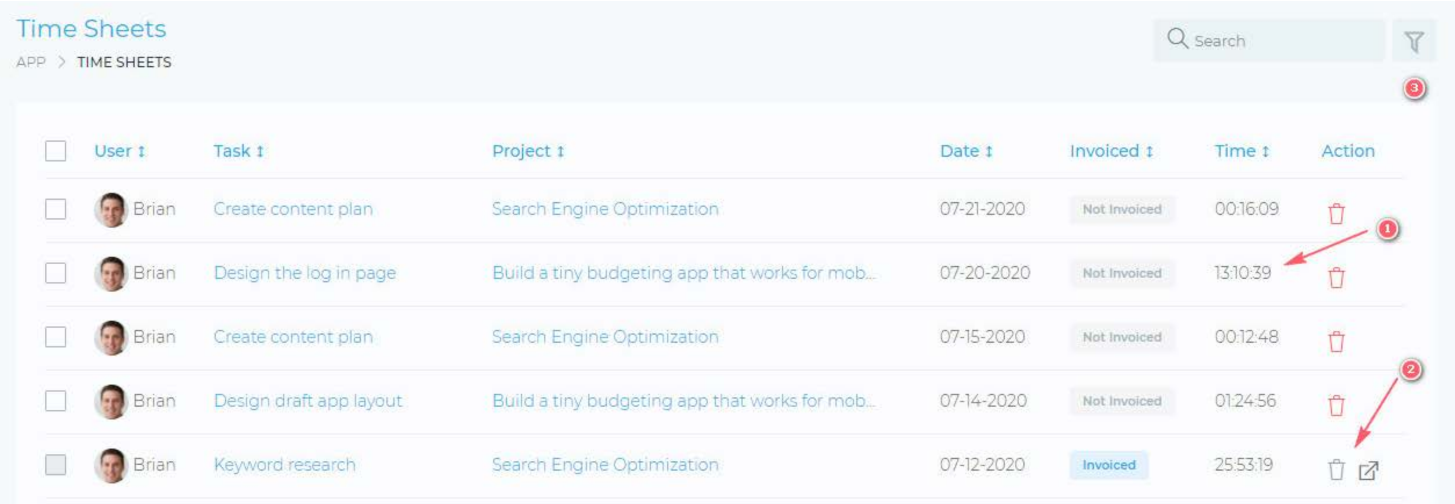


Time Sheets

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)



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

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.

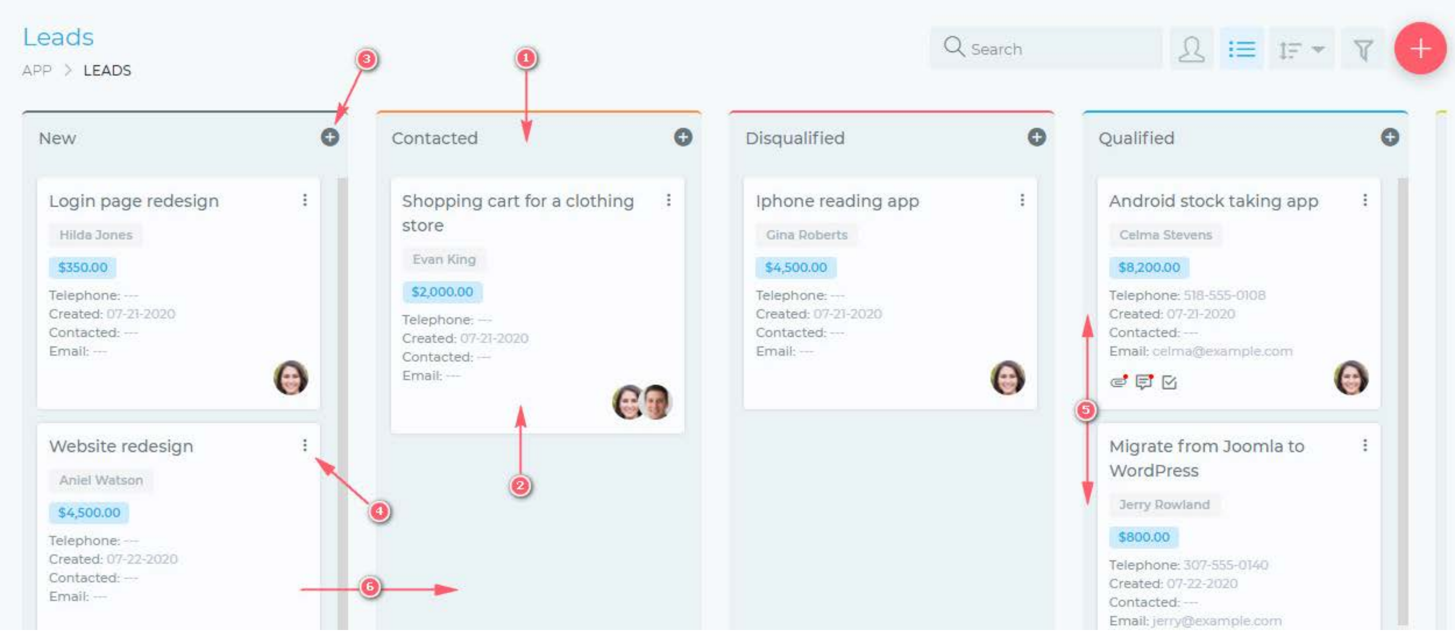
Using the main actions panel (as shown above) you are able to do the following:

- (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.

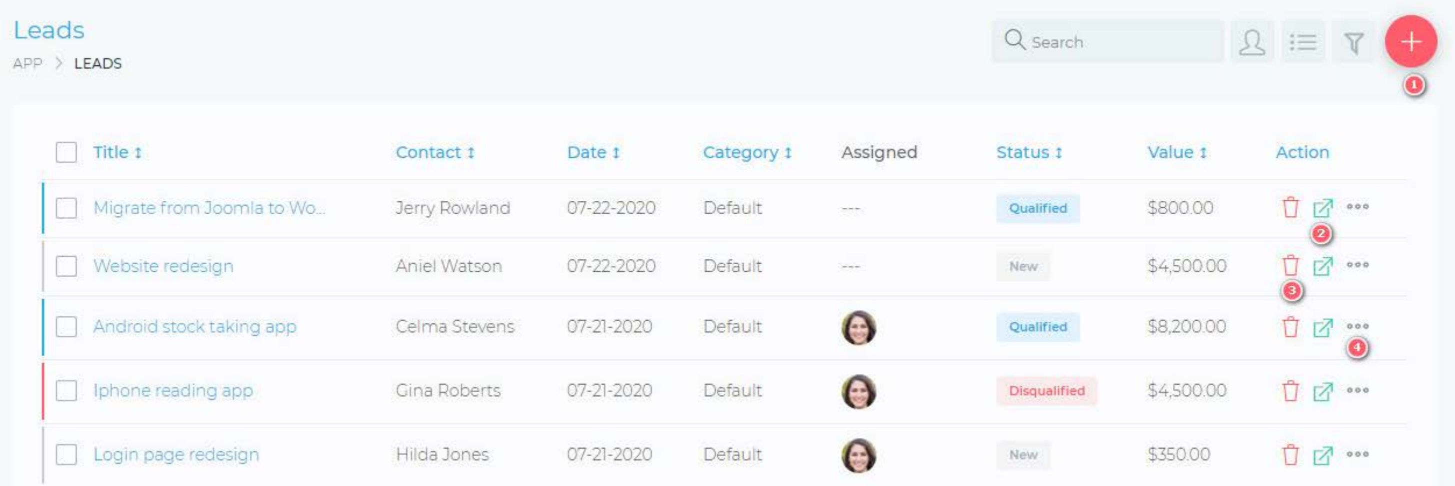


The kanban view has the following features:

- (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.



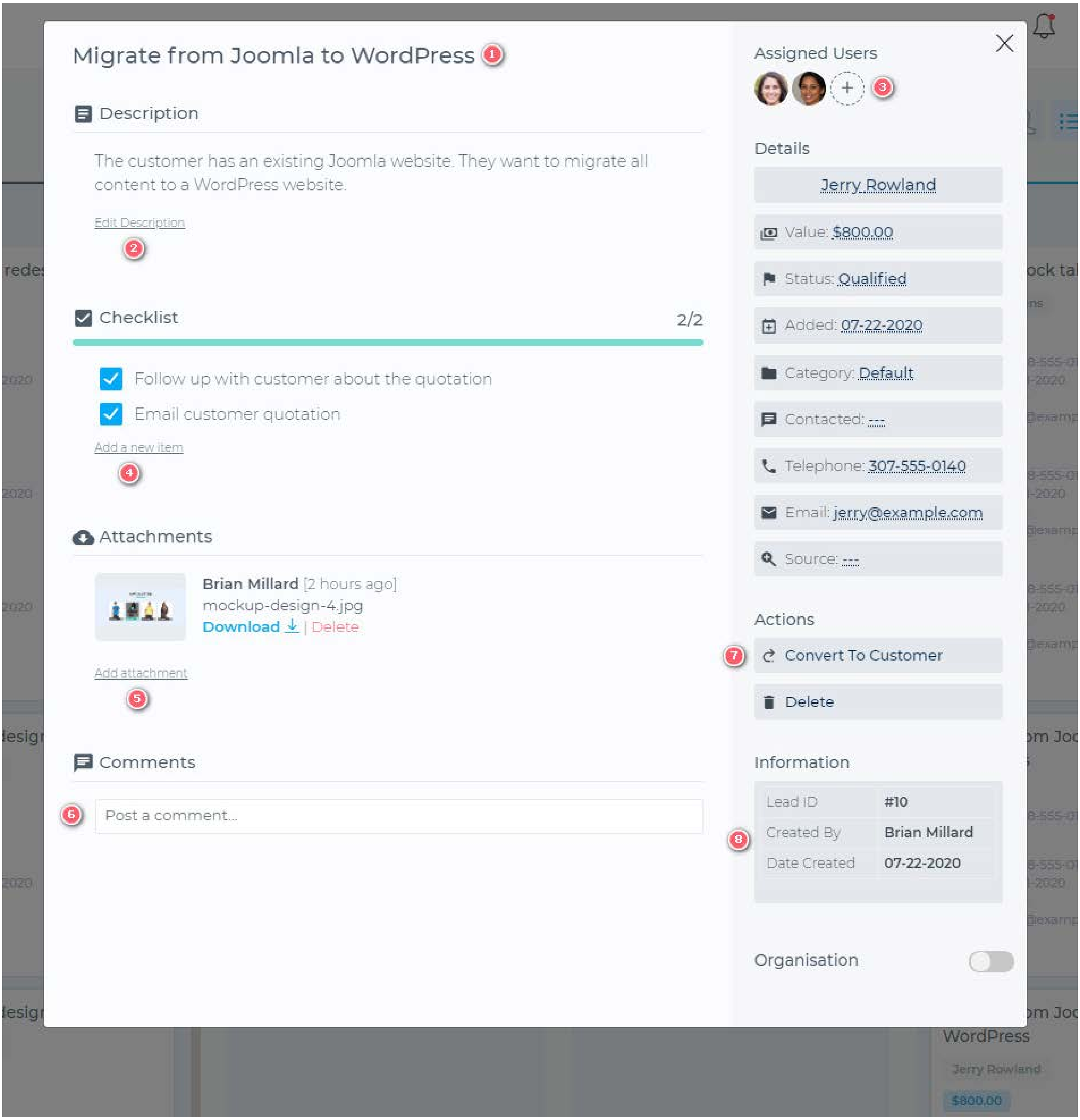
From the table list view, you are able to do the following:

- (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:



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

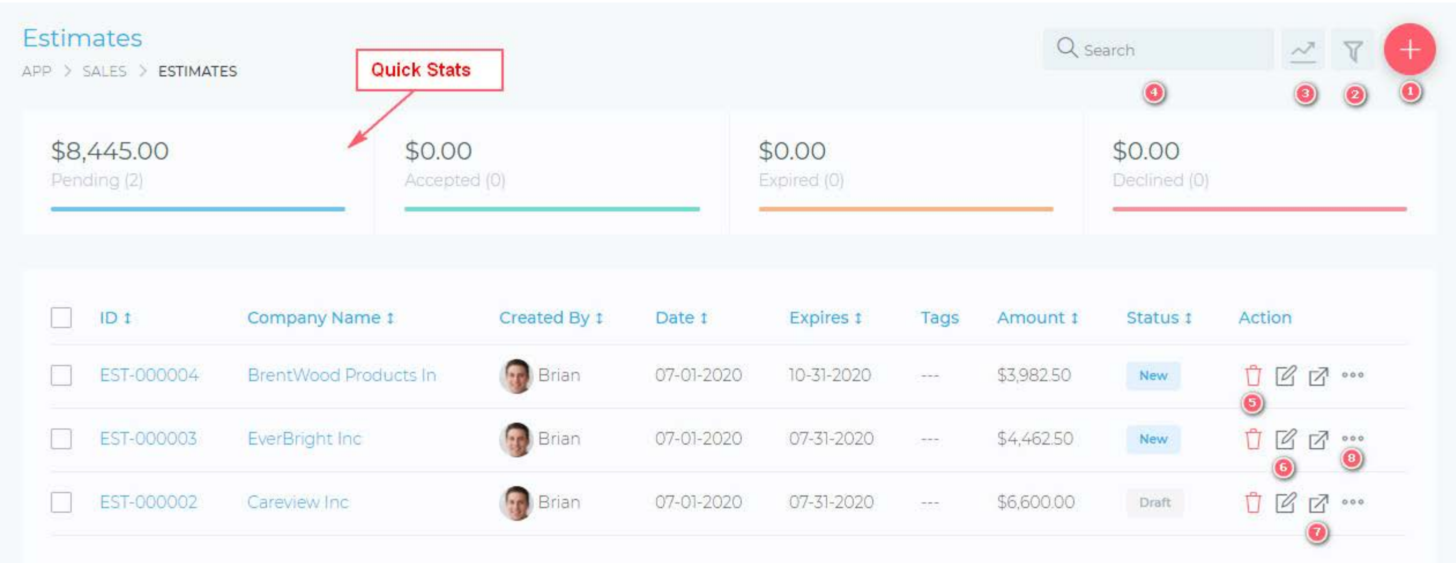
1. Estimates Overview

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



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.

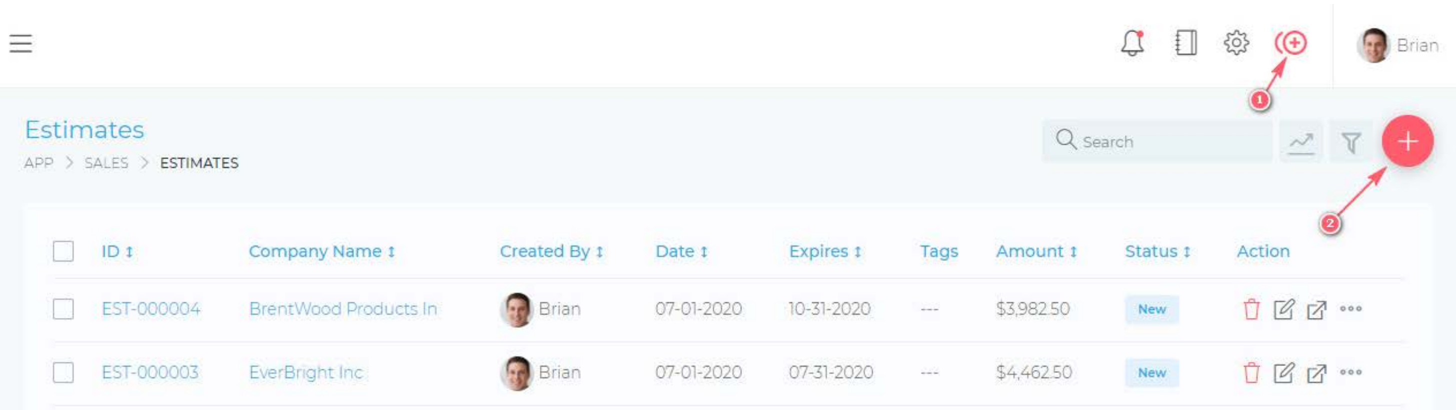
2. Creating Estimates

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.



Basic information

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

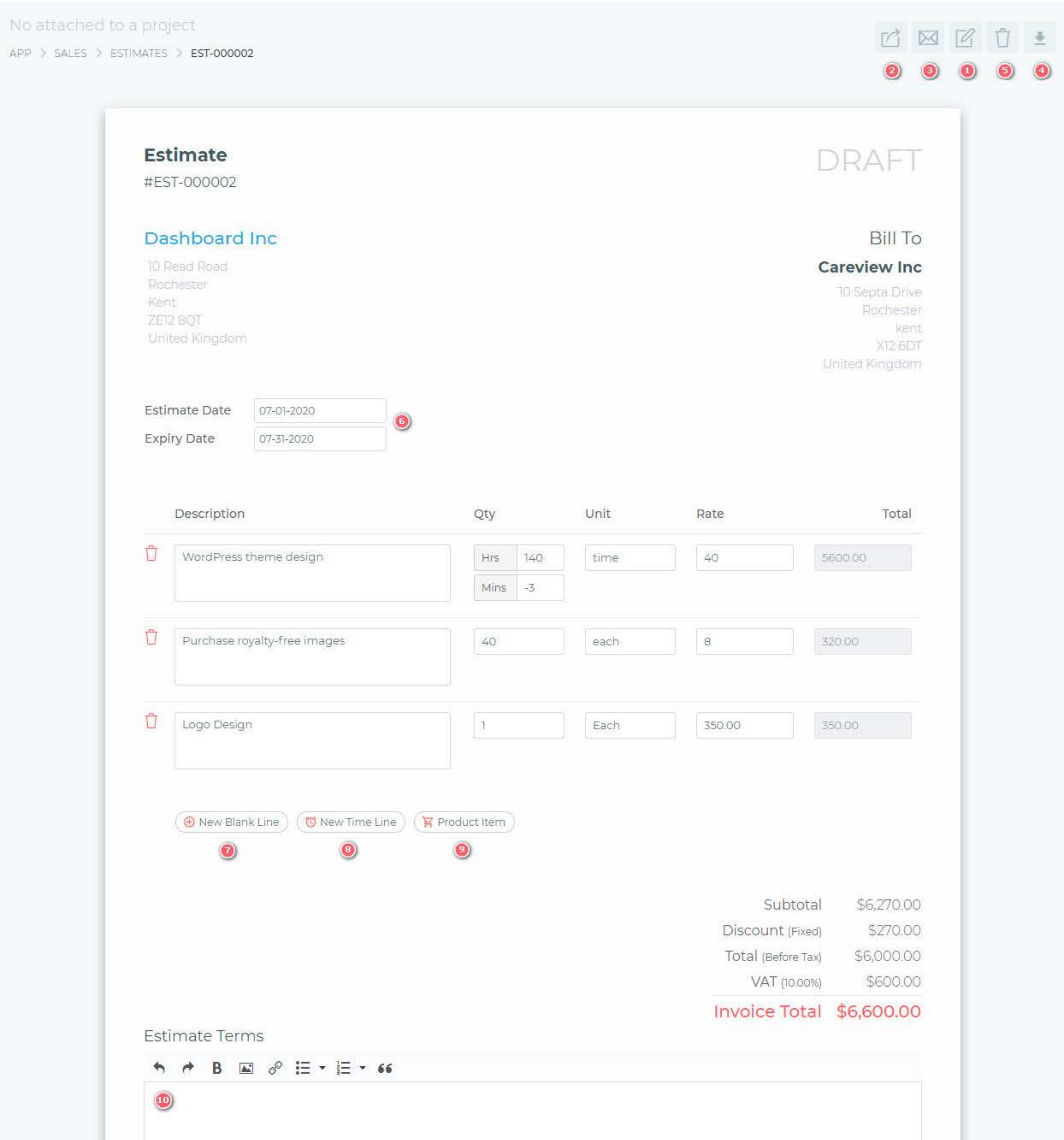
Additional information

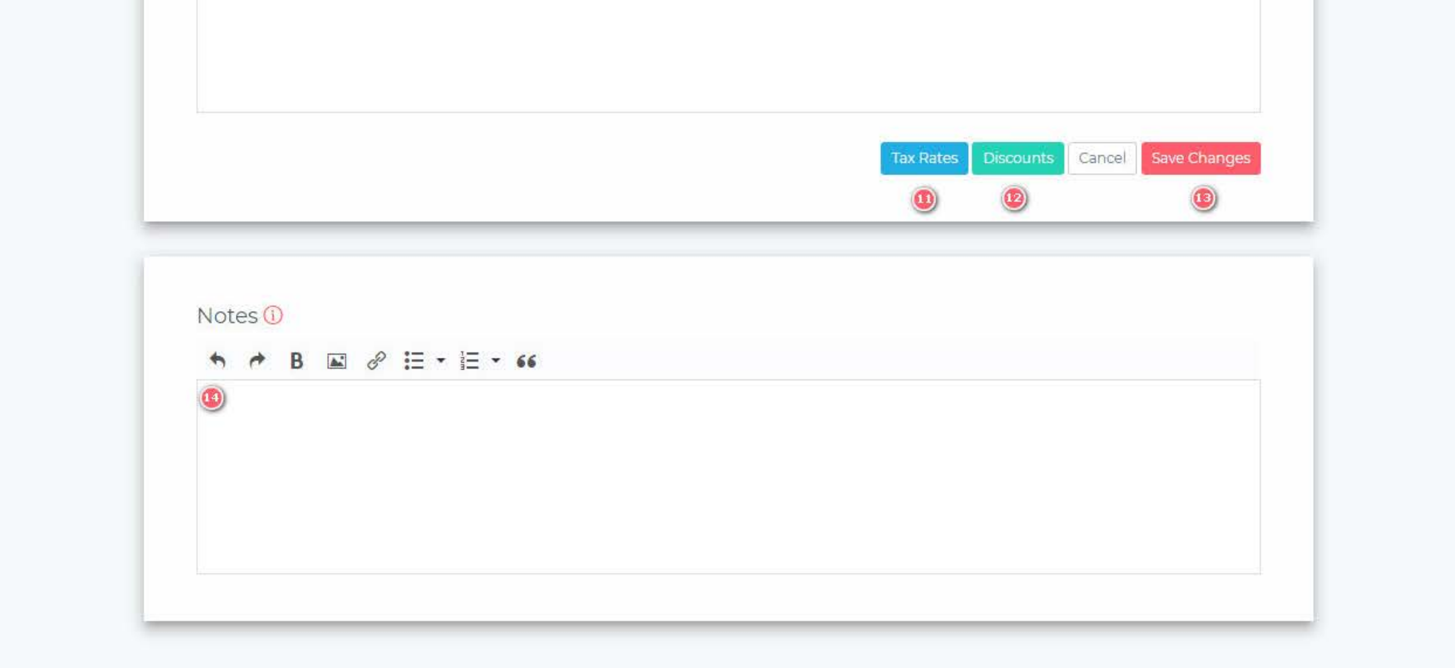
- Tags
  - Tags can be any text that allows you to easily identify or highlight important information about the estimate.
- Notes
  - You can add estimate notes, which are not visible to the client
- Terms & Conditions
  - Default estimate terms are set via the dashboard settings section. You can change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

default terms when you create or edit an estimate.

3. Editing Estimates

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.





- (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 is 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.

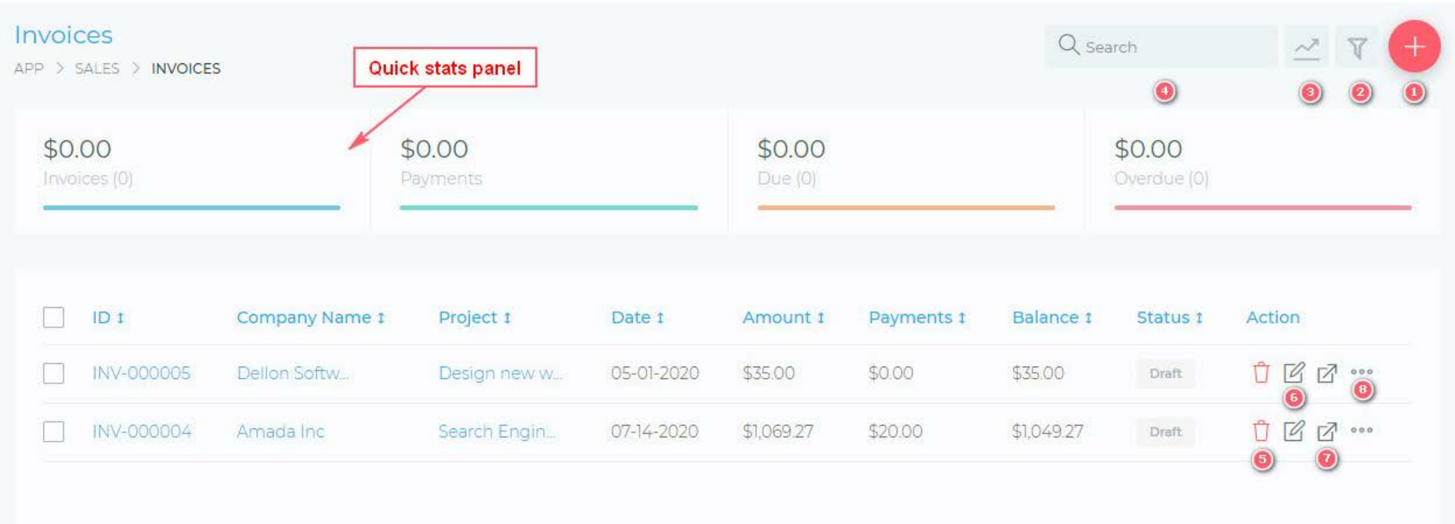
- (11) Tax Rates
  - You various tax rates are created via the dashboard settings section. These tax rates are then available for applying in estimates. You can apply more that one tax.
- (12) Discounts
  - You can apply a fixed or percentage-based discount.
- (13) Save Estimate
- (14) Estimate Notes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

1. Invoices Overview

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



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.

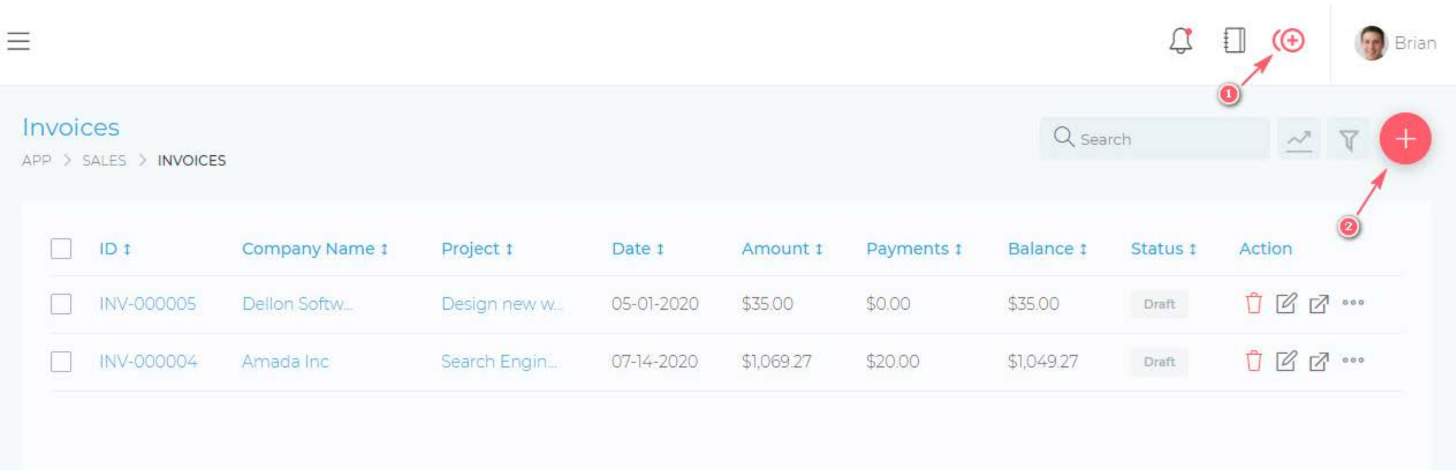
2. Creating Invoices

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.



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

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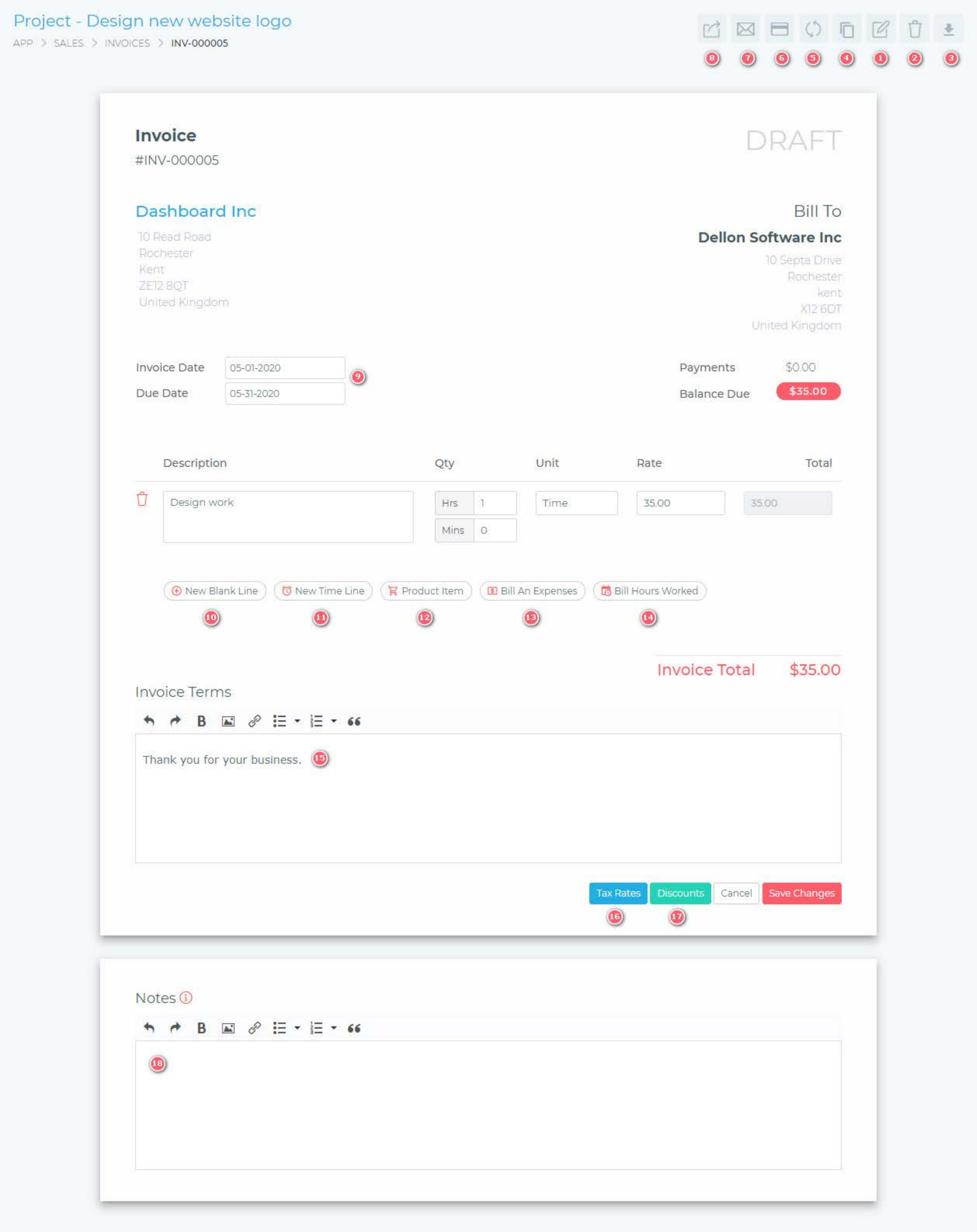
Creating A Recurring Invoice

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.



- (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 is 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 that 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

Foo

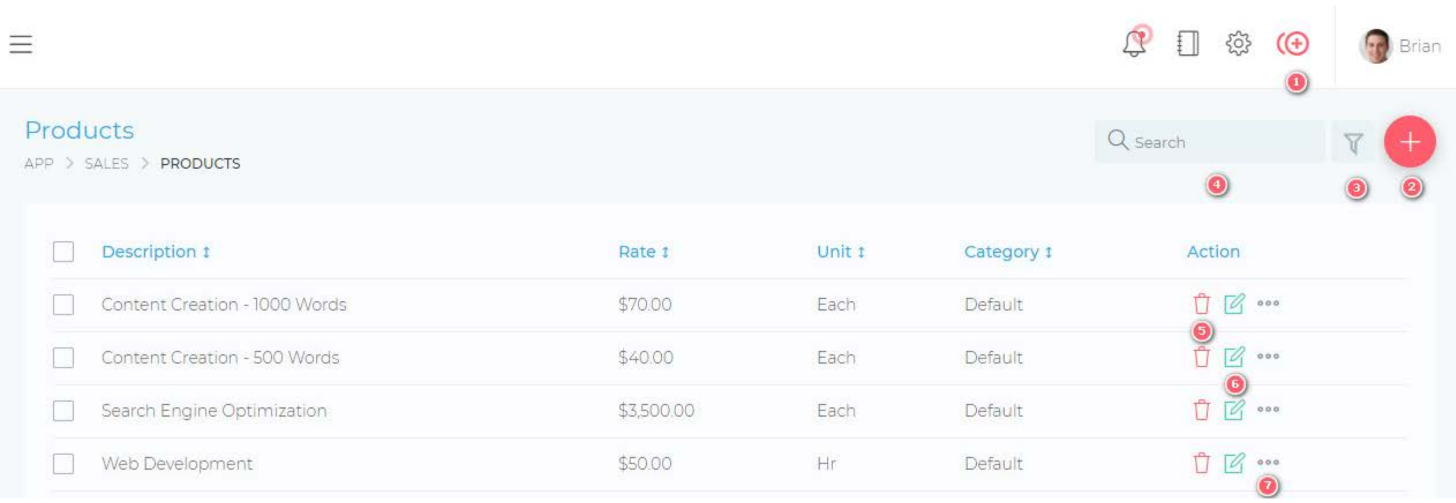
5. Invoice Products

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

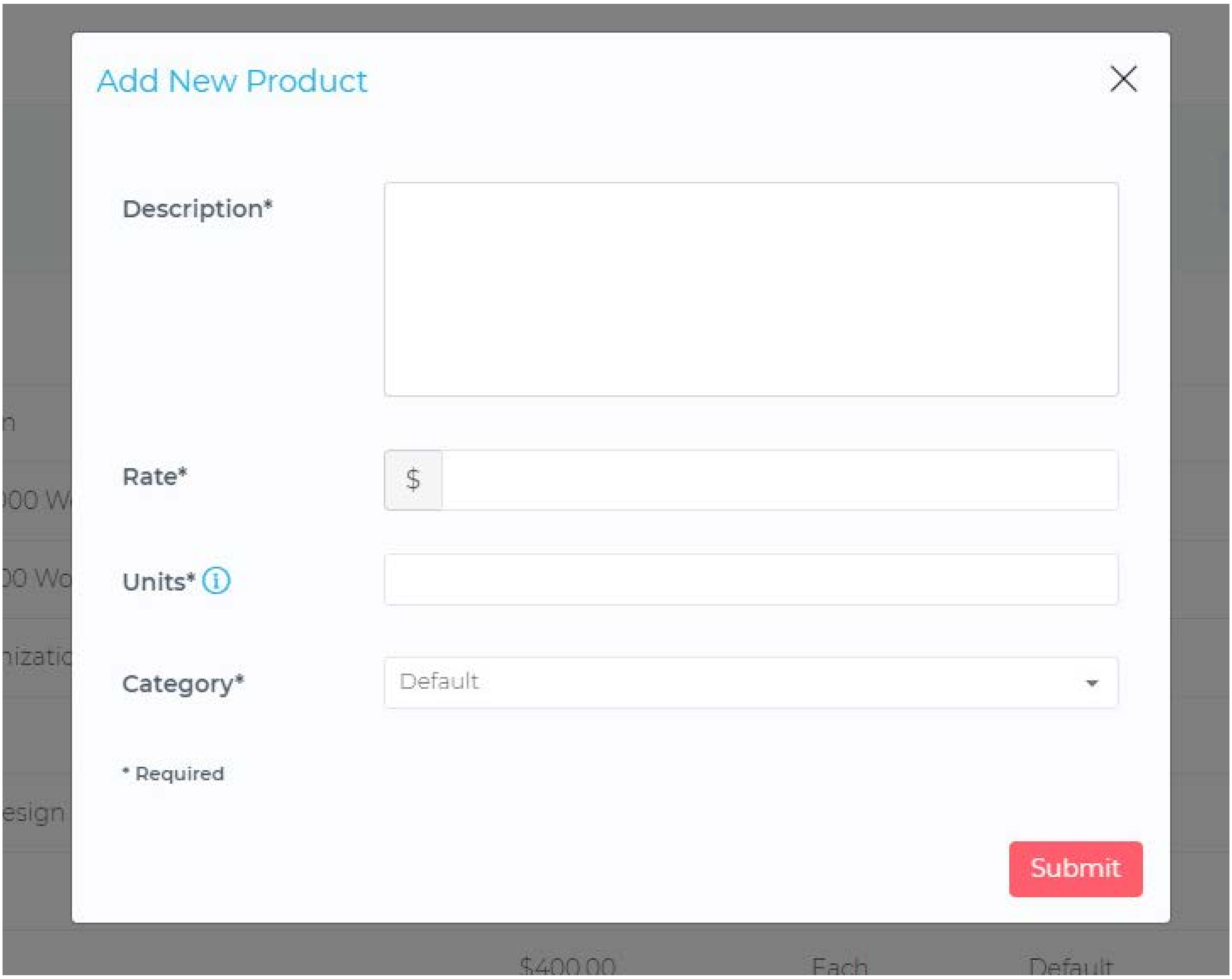
Managing Products



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



Basic information

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

1. Expenses Overview

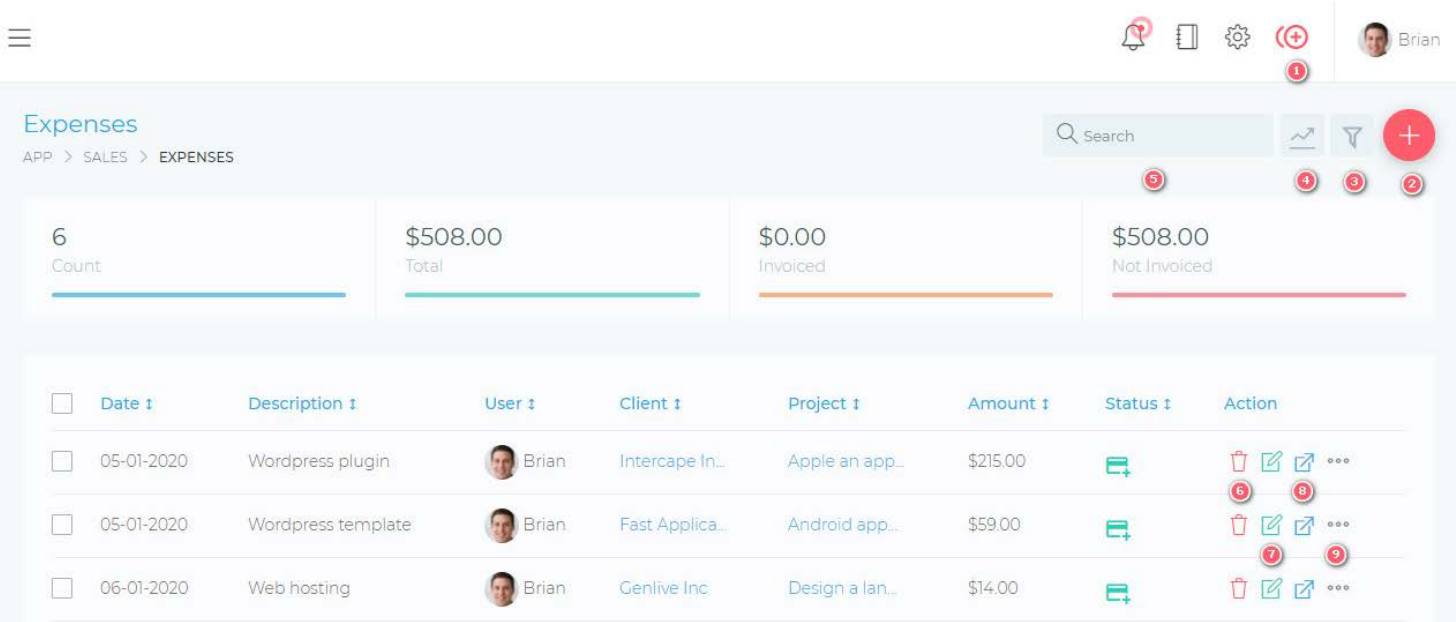
The expenses feature allows you to record all your businesses expenses. You can record expenses that you incur on customer's projects or expenses you incur in the operation of your business.

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

The best place to start is the Expenses page.

:: Main Menu > Sales > Expenses

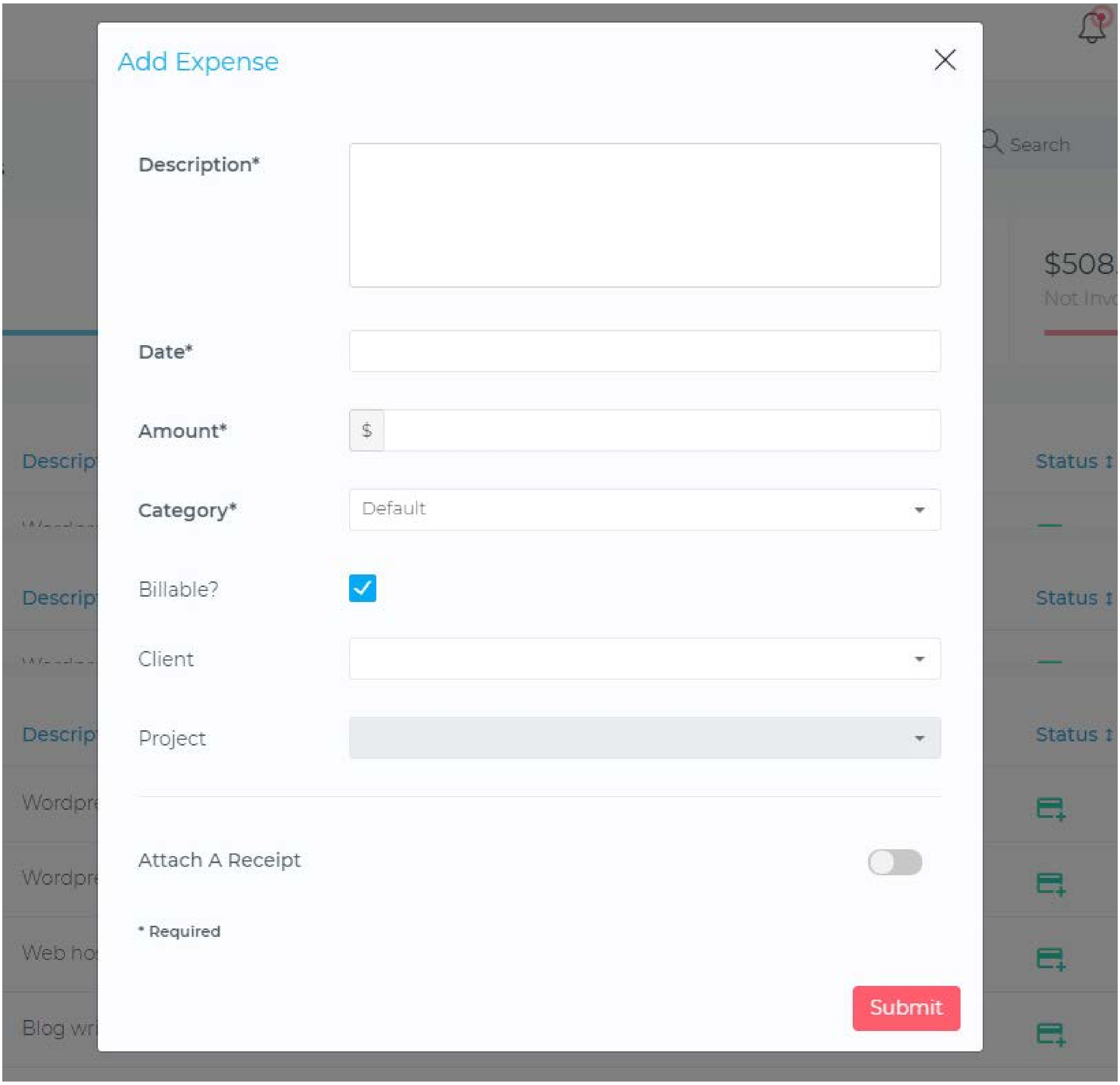
Managing Expenses



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



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

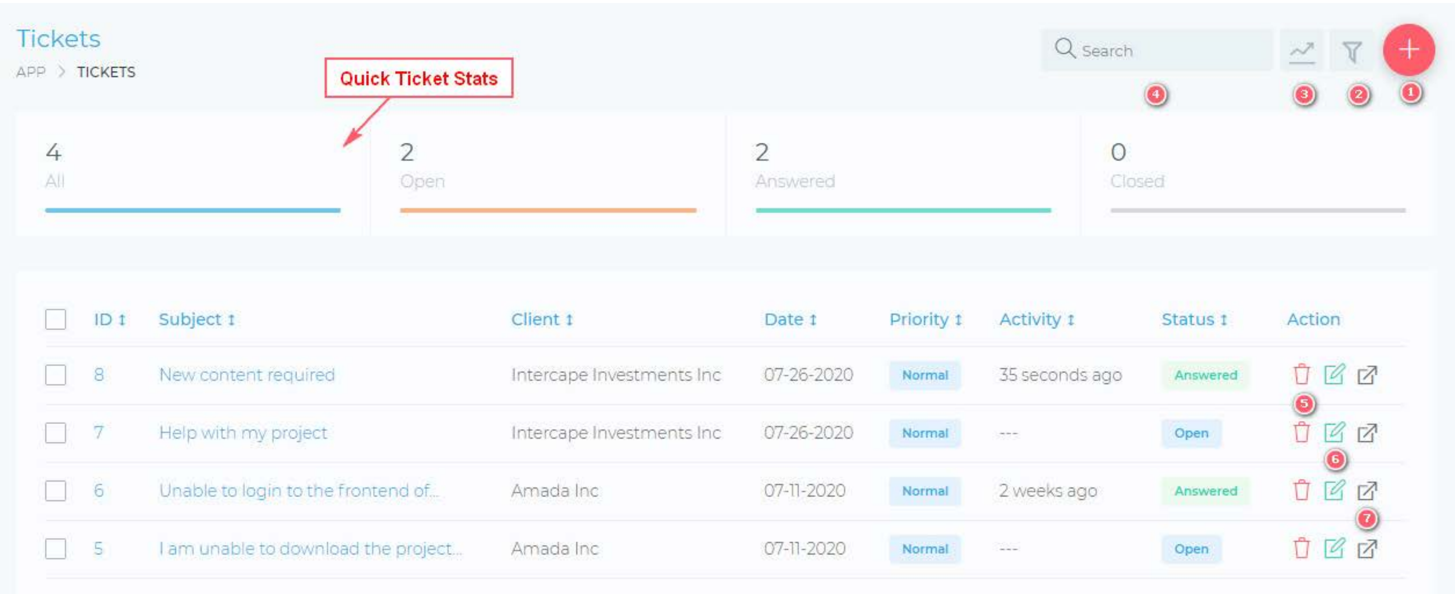
The support tickets feature enables you to boost your customer satisfaction by providing them with speedy assistance. Your customers are able to open new support tickets and your team can work together to resolve customer issues.

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

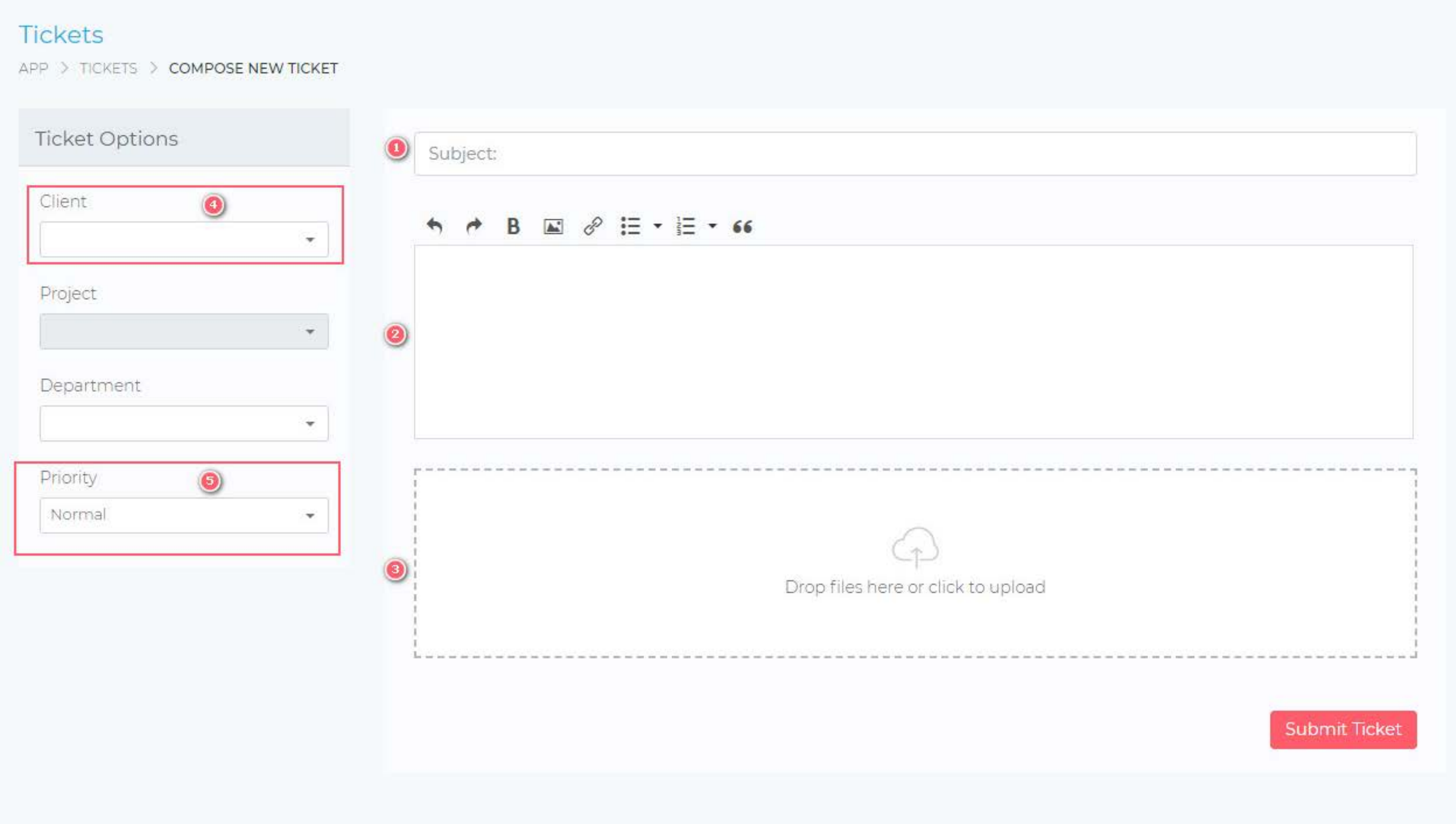
Managing Tickets



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



- (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
Intercape 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.

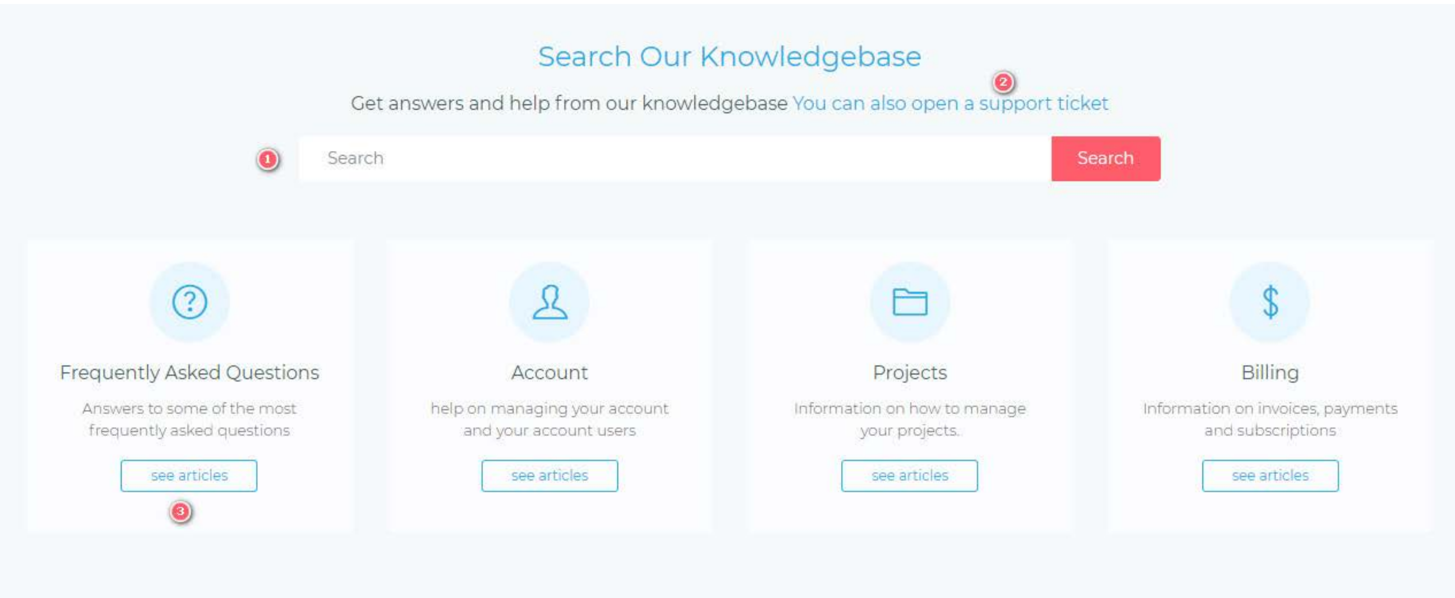
You can create frequently asked questions, step by step instructions, help documentation, etc.

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

The best place to start is the knowledge base page.

:: Main Menu > Knowledge Base

Overview



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

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:

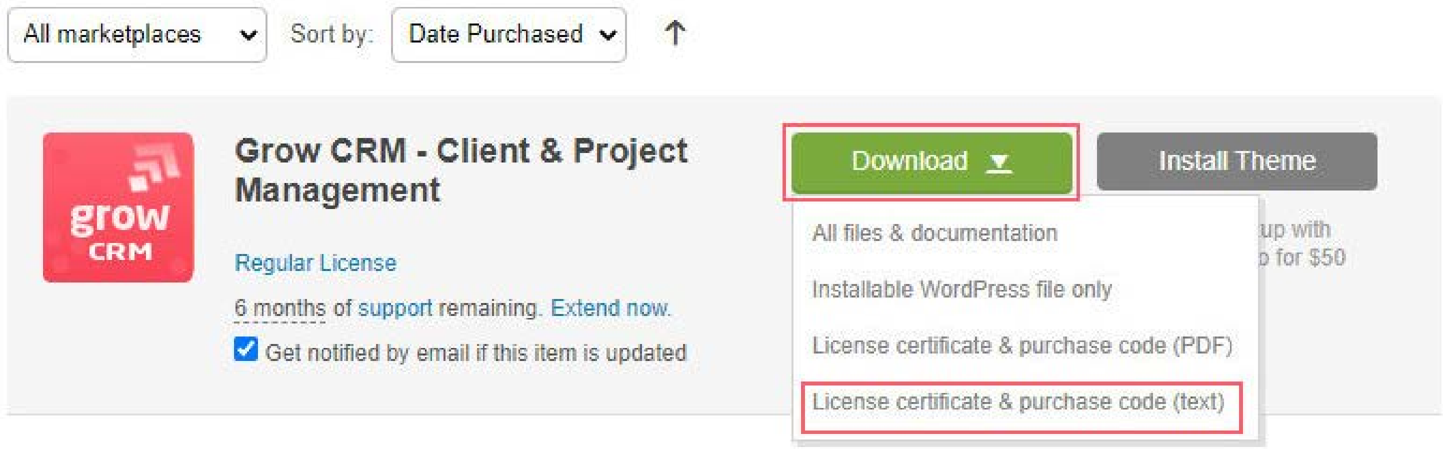
- (4) Create new articles for this category.
- (5) Edit/managed all articles.

1. Main Settings

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



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

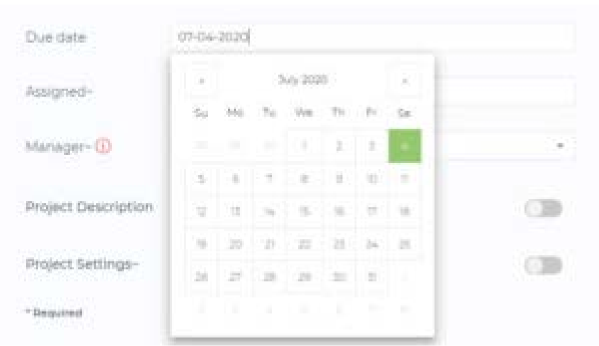
For example., if most of your clients are from North America and Canada, you can use m-d-Y format.

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).

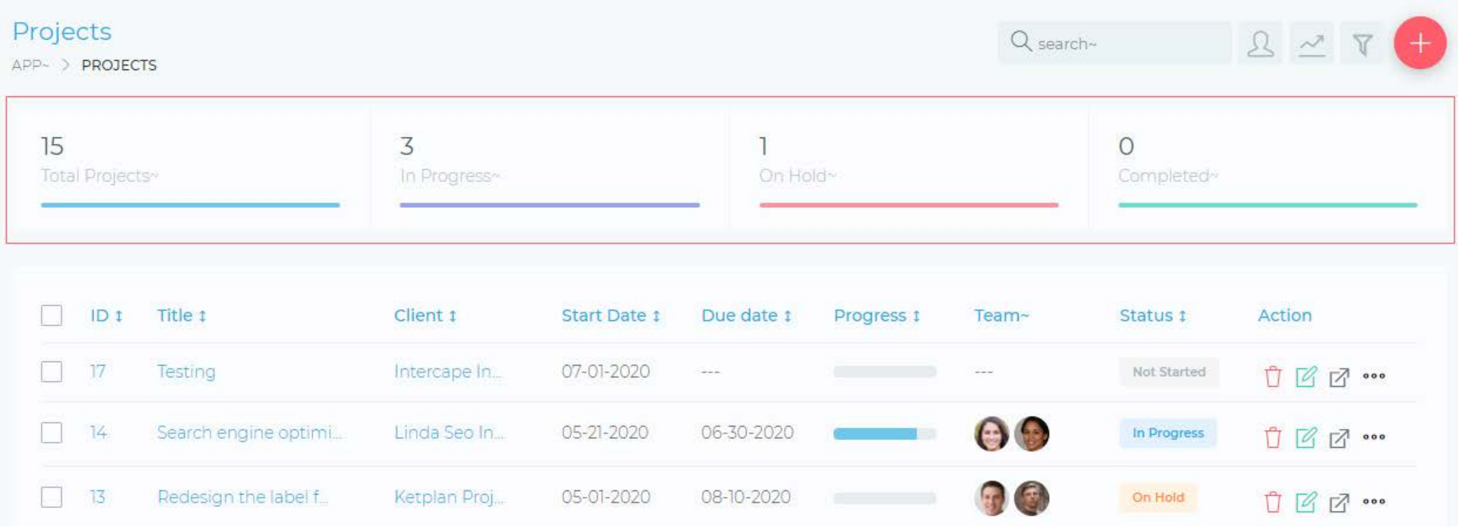


Table Pagination Limits

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

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

1. Start Here – Error Logs

You are here: Main Errors & Debugging 1. Start Here - Error Logs

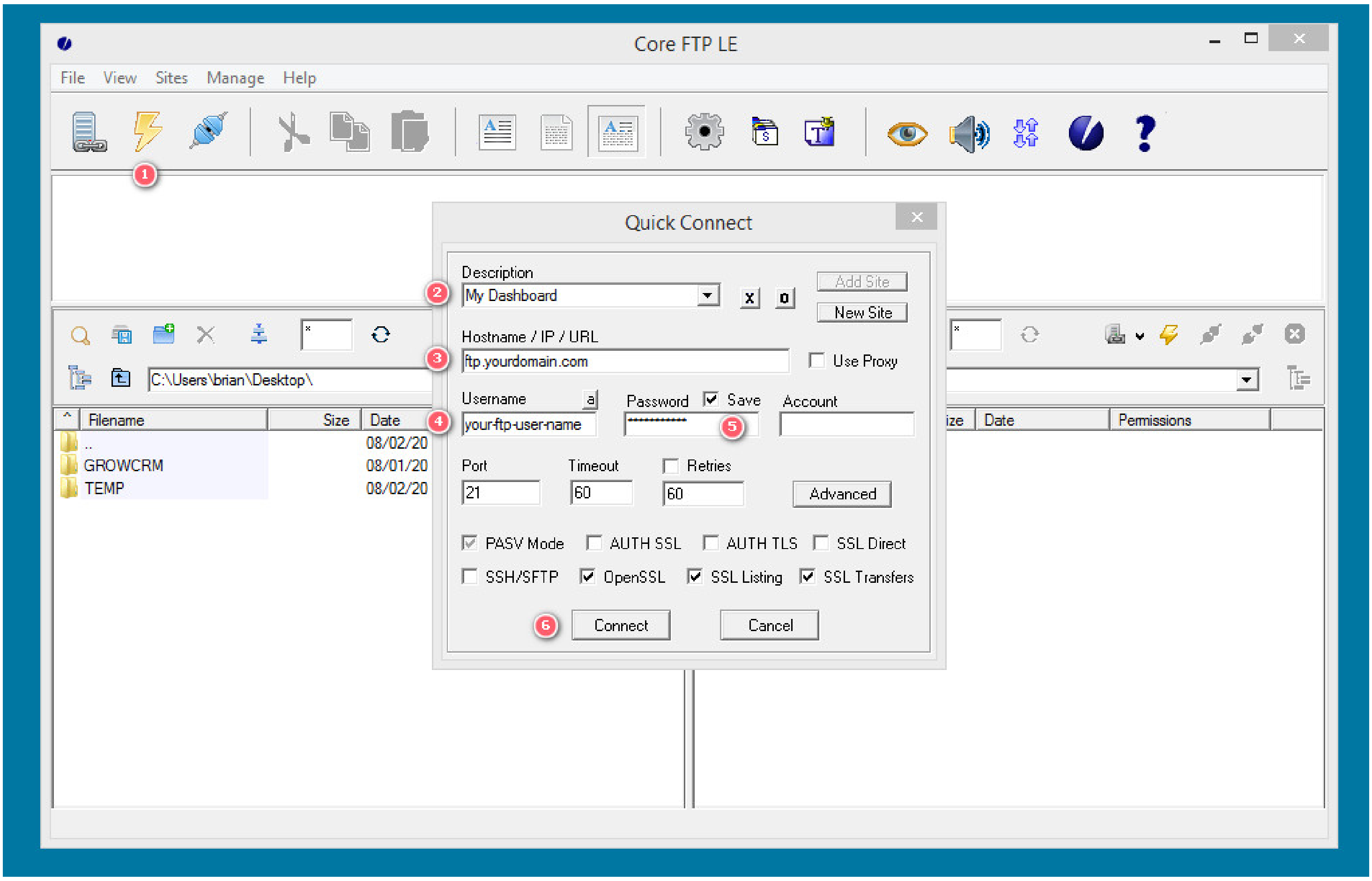
Most problems/errors that you encounter with Grow CRM, are recorded in the error logs. Whenever you get in touch with us for help, you may be asked to send us your error logs.

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

DOWNLOADING ERROR LOGS

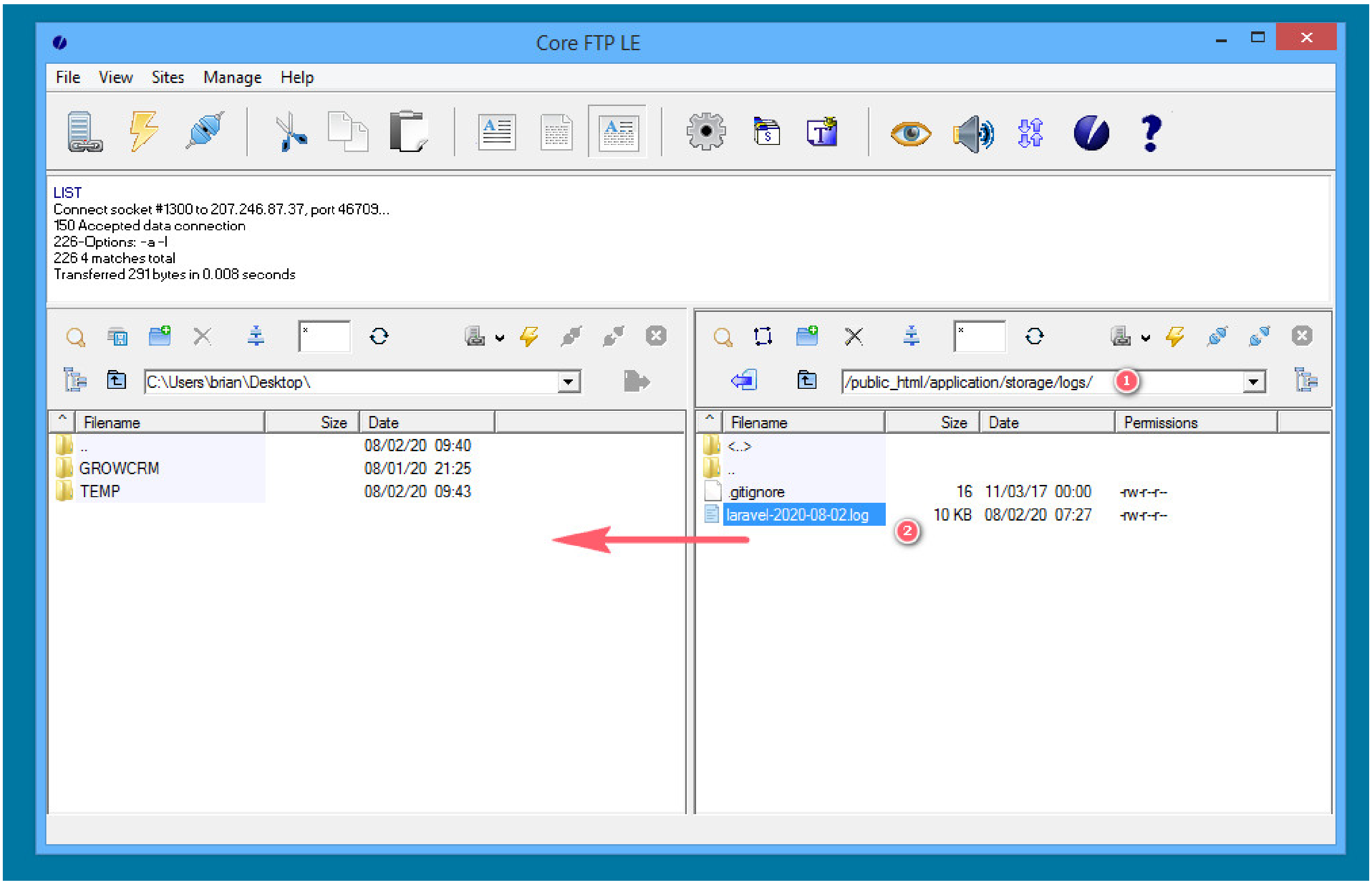
To download the error logs, you will need to connect to your server via FTP. If your web hosting control panel has a file browsing tool, you can also use that instead.

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.
- SMPT 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 yo download the error logs, to identify the error.

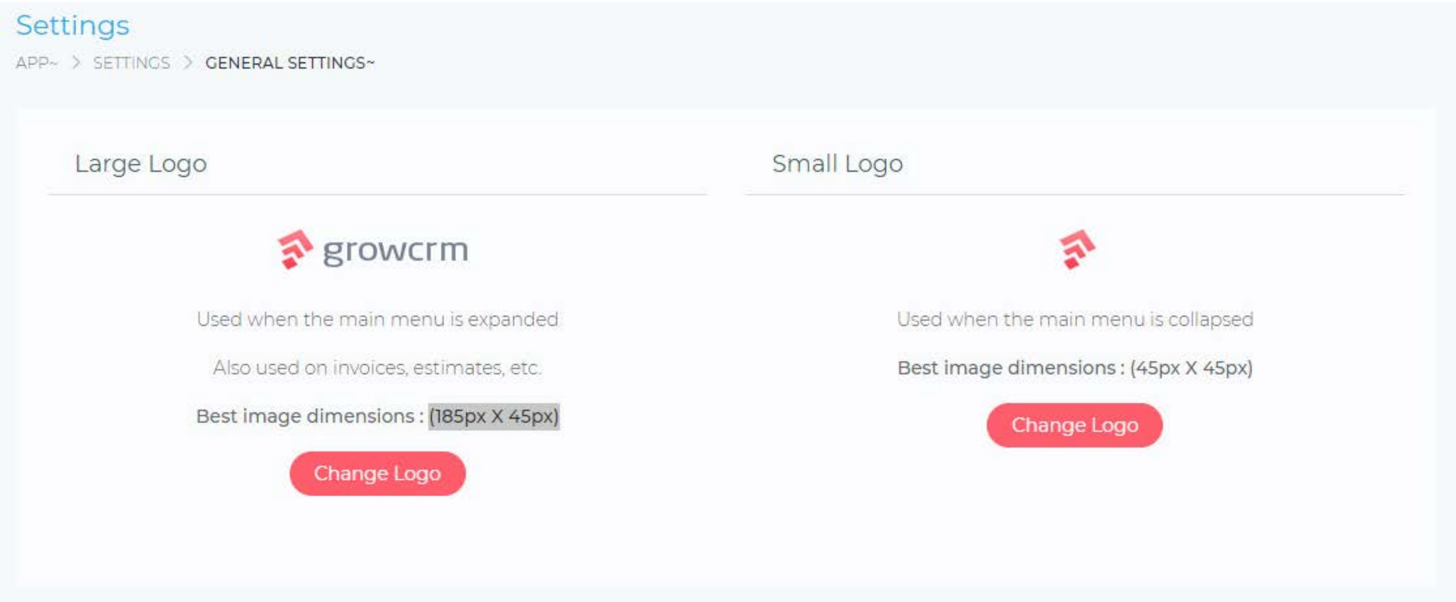
3. Chage Company Logo

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.

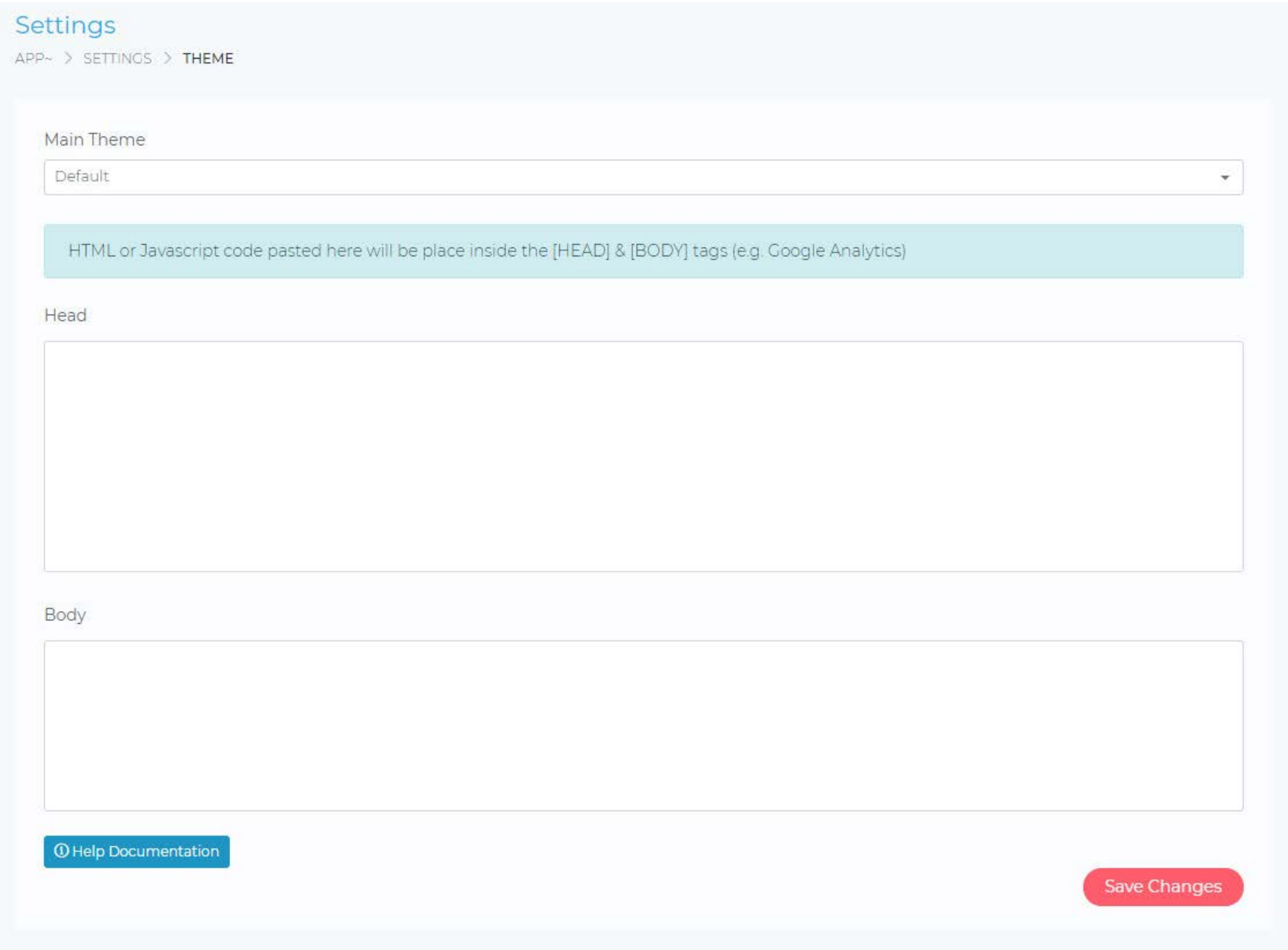


4. Theme

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

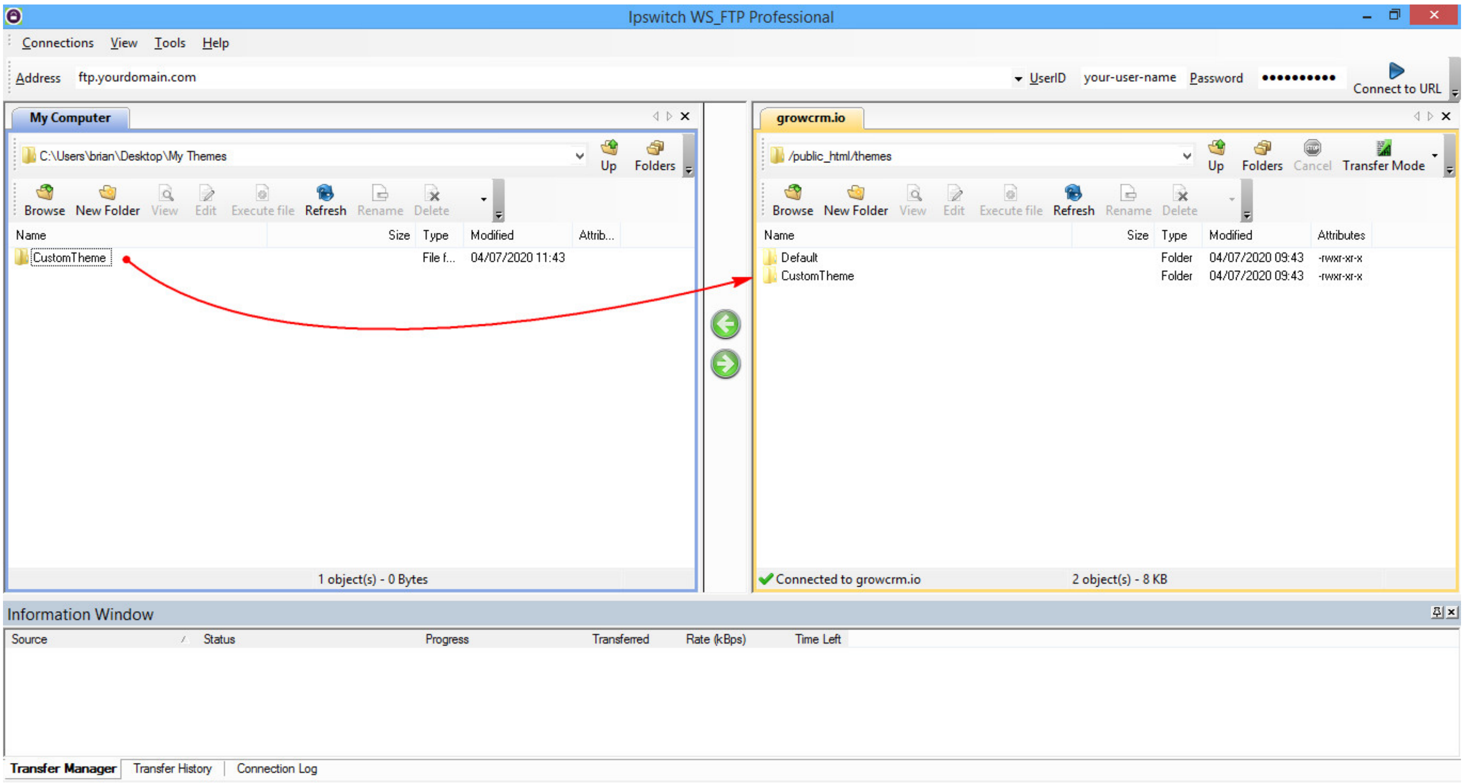


Installing A New Theme

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 loos 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

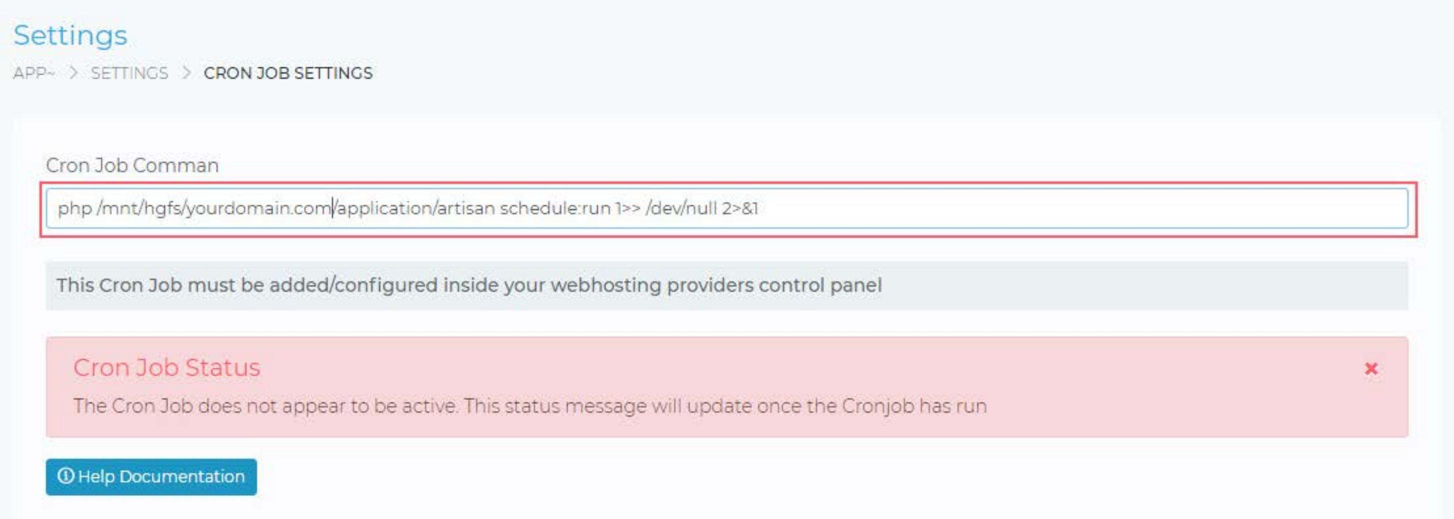
We provide you with a unique URL like command inside the dashboard. You will need to add this command inside your web hosting providers control panel. Step by step instructions are given below.

STEP 1

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

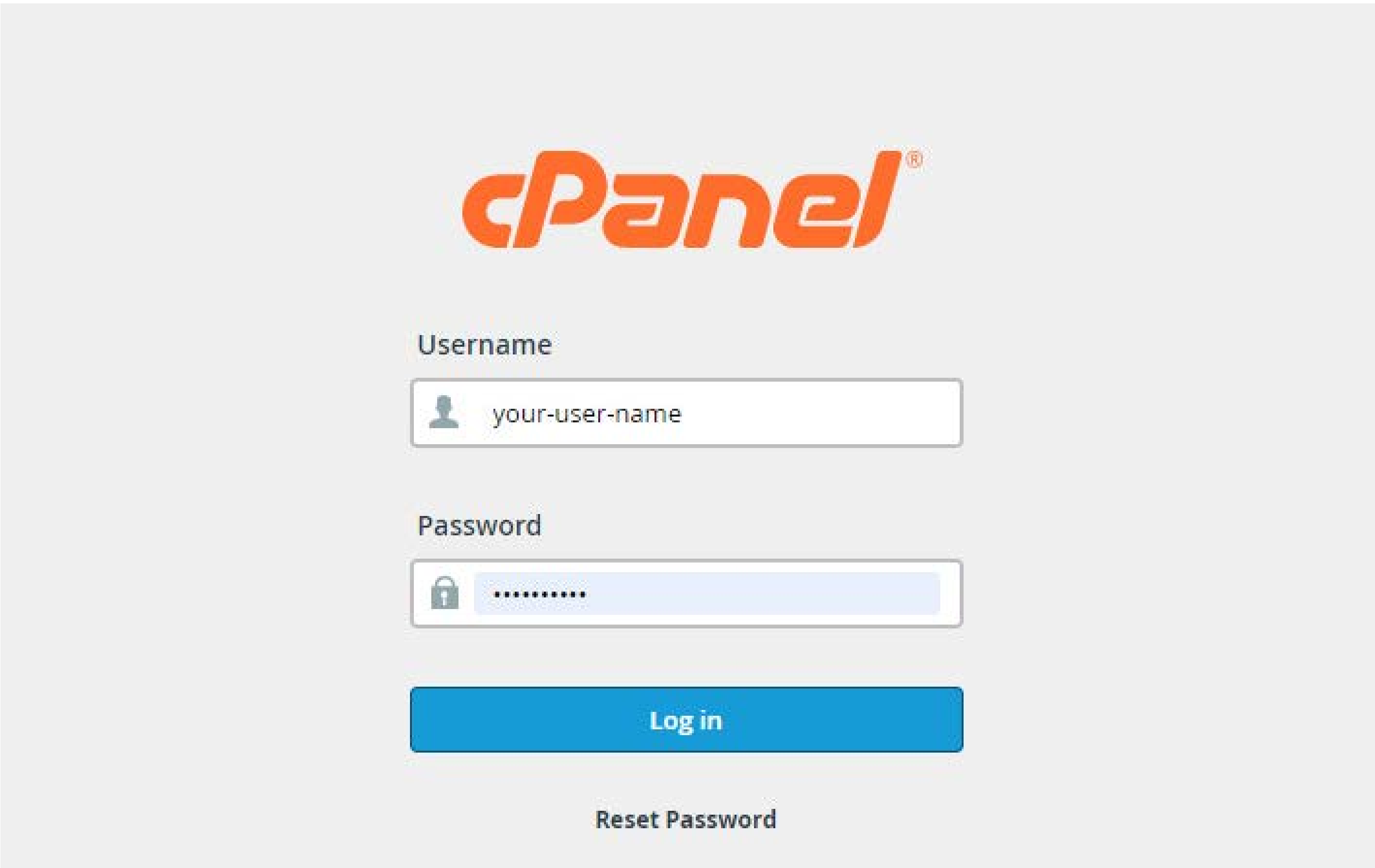
Dashboard > Settings > Cronjobs

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



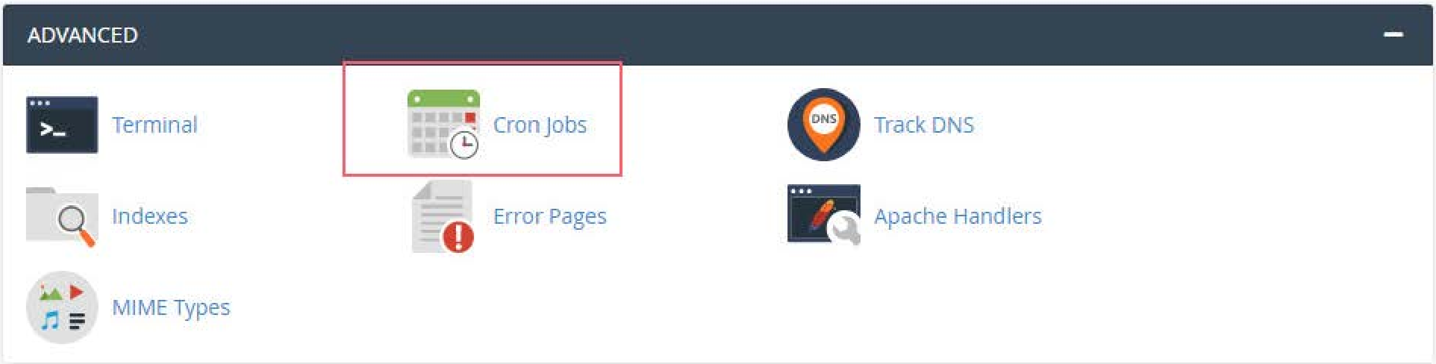
STEP 2

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.



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

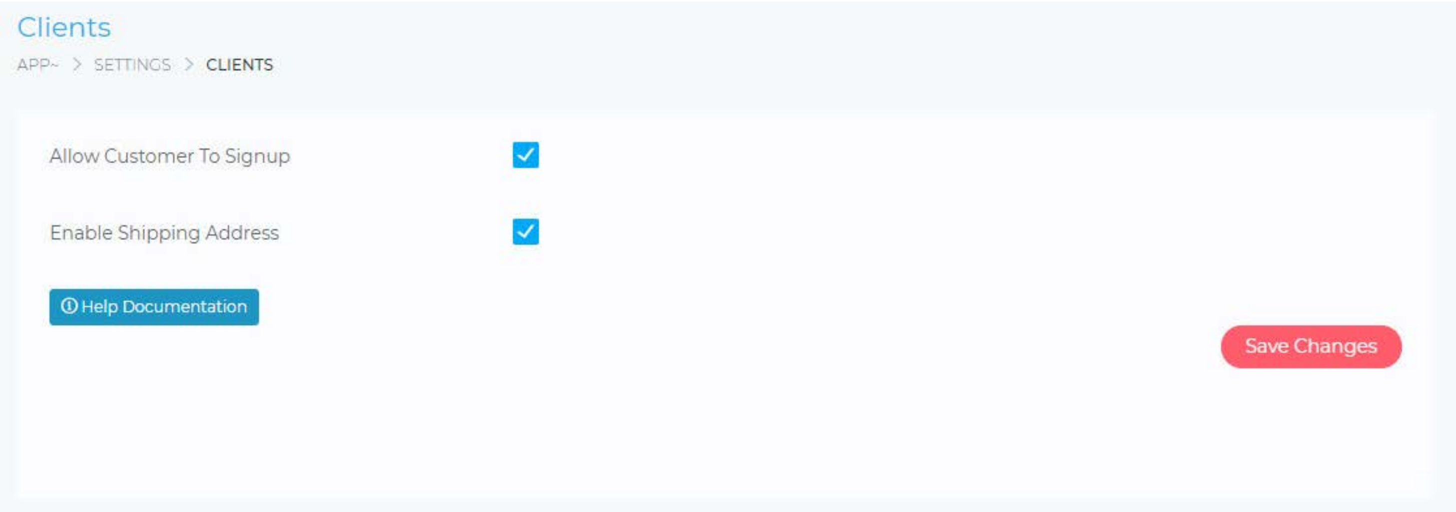
Once you have done all the steps above, you would have finished setting up the Cron Job.

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

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.



7. Category Settings

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

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

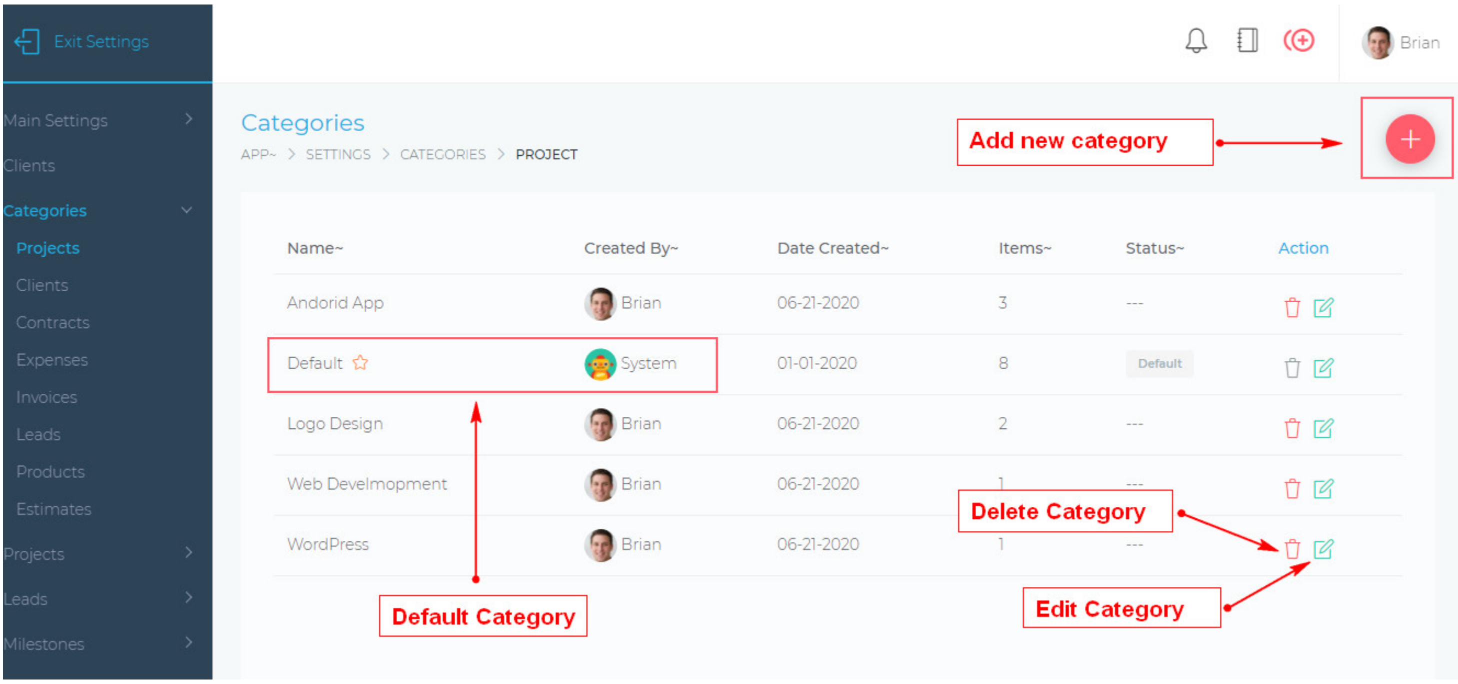
Categories are available for Invoices, Estimates, Projects, etc.

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

<u>Example</u>

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

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



- 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.

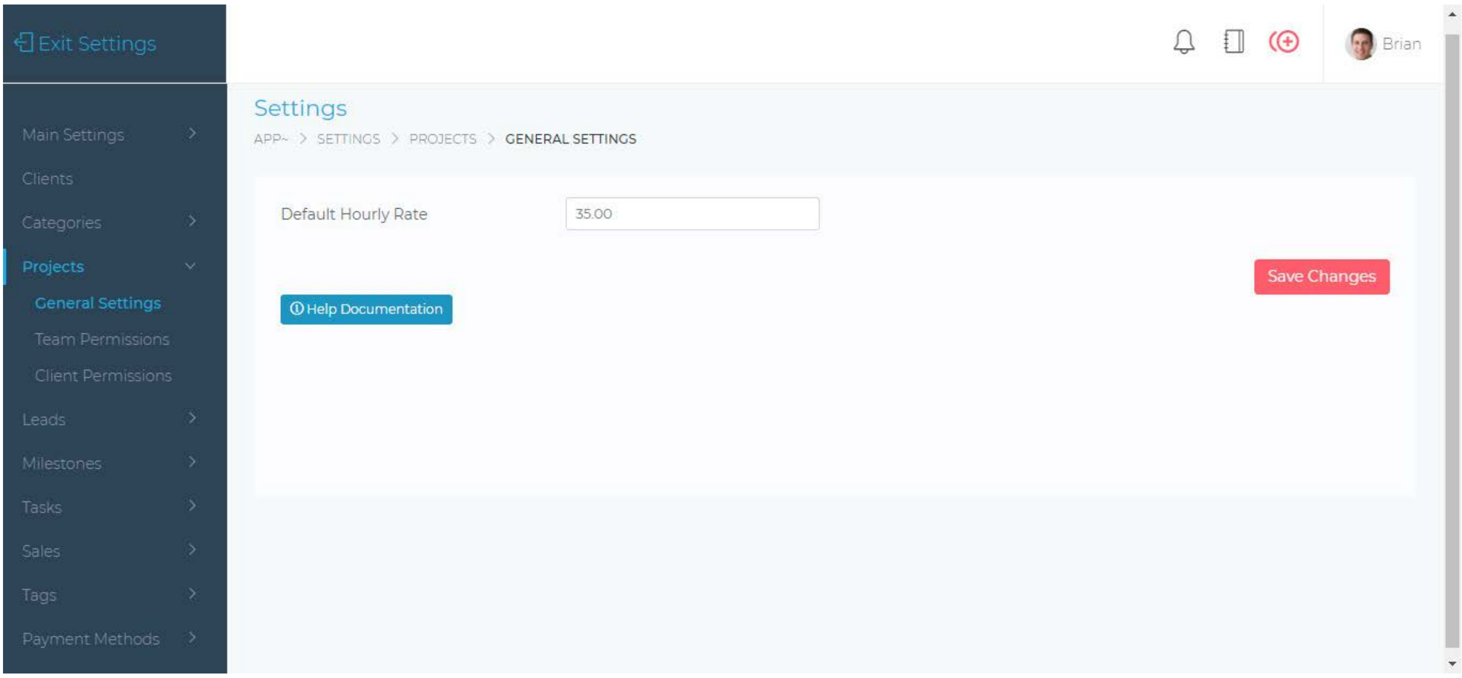
8. Project Settings

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.



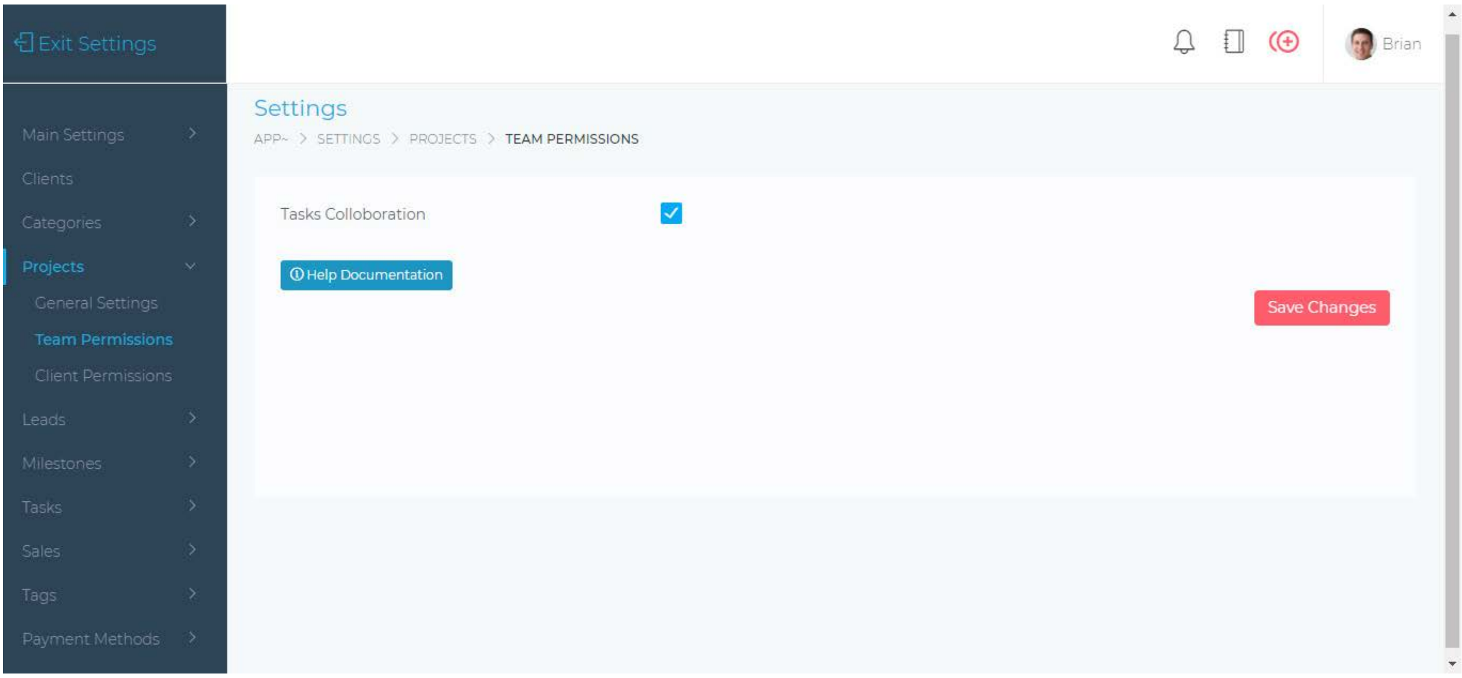
Team Permissions

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.

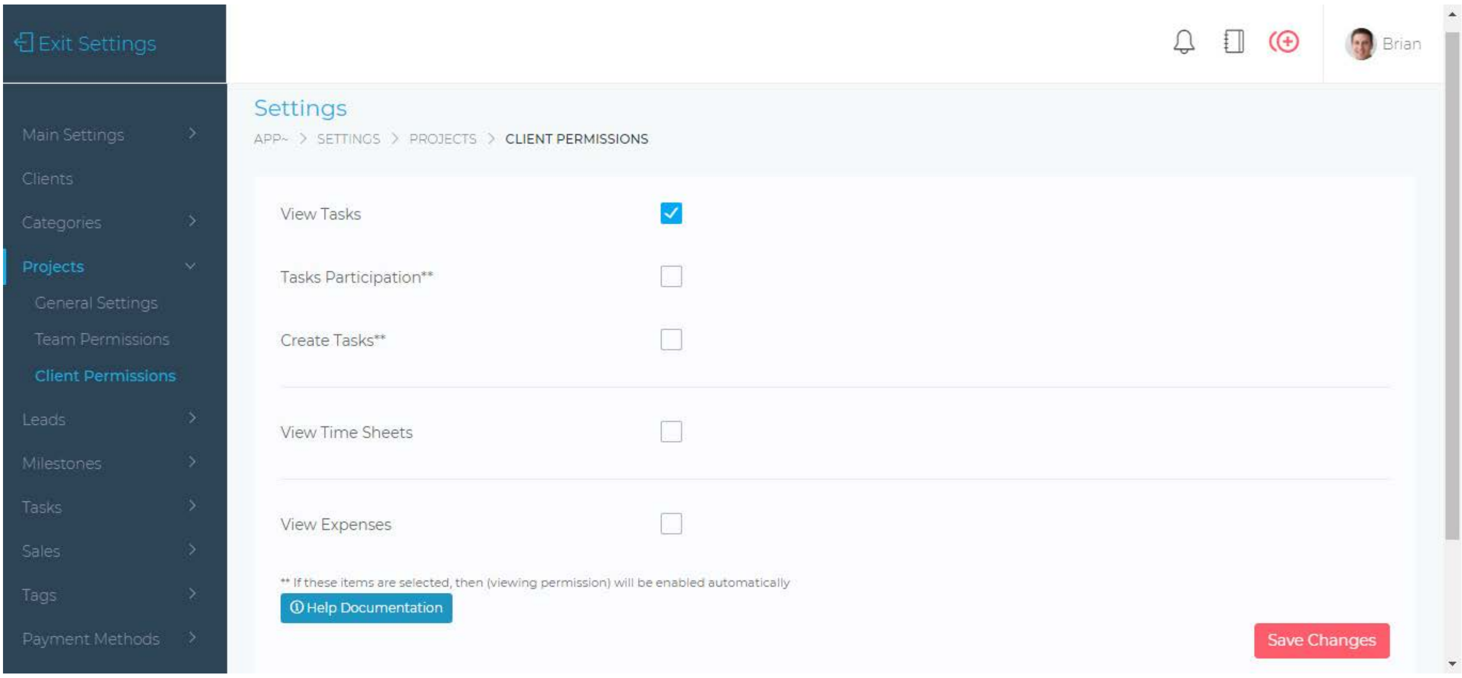
- Comment, upload files, create checklists, etc, on everyone's tasks.



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



- 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.

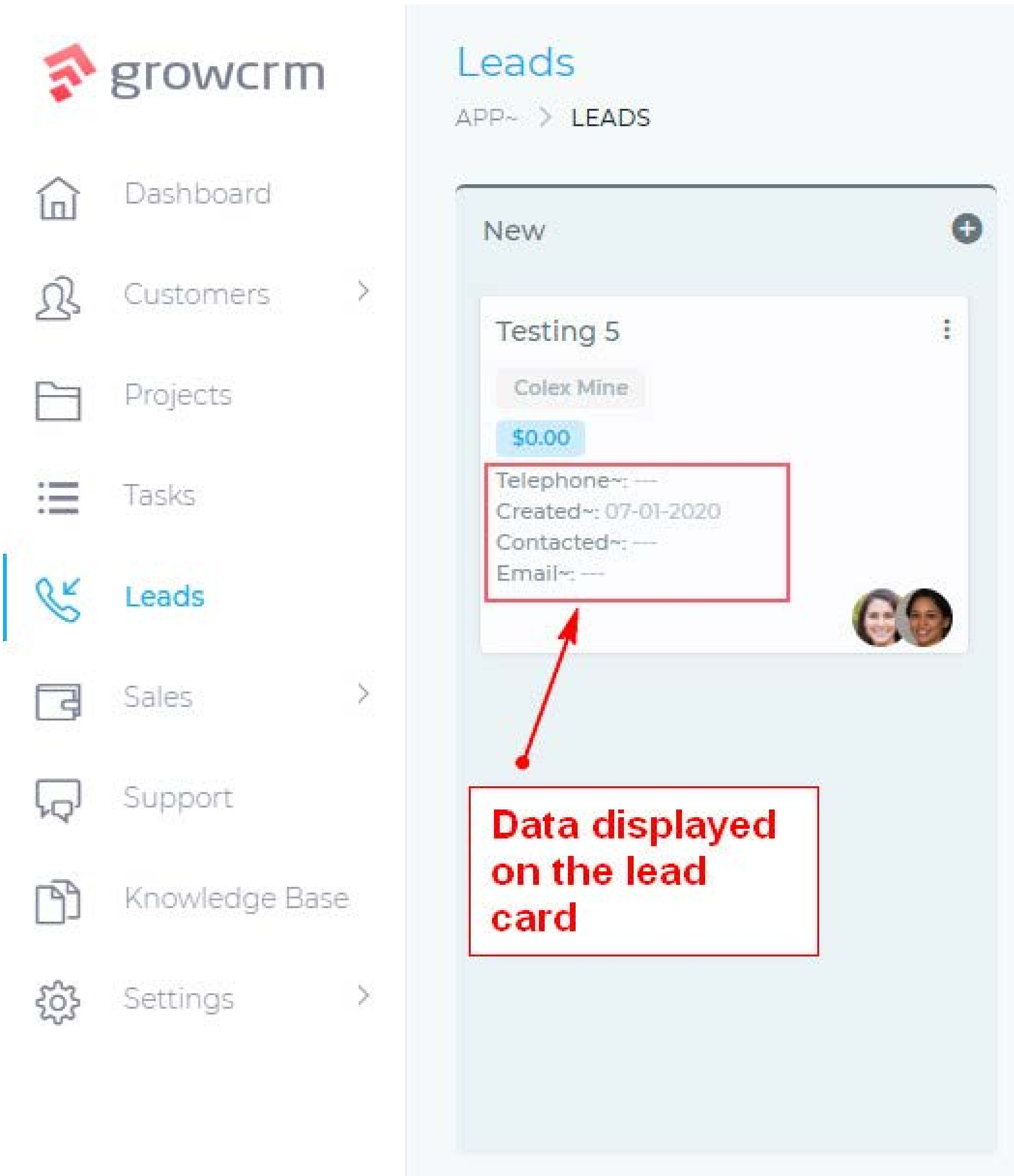
- View Time Sheets – When enabled, the client will be able to see all the time logged by team members on their project.
- View Expenses – When enabled, the client will be able to view all expenses record on their project

9. Leads Settings

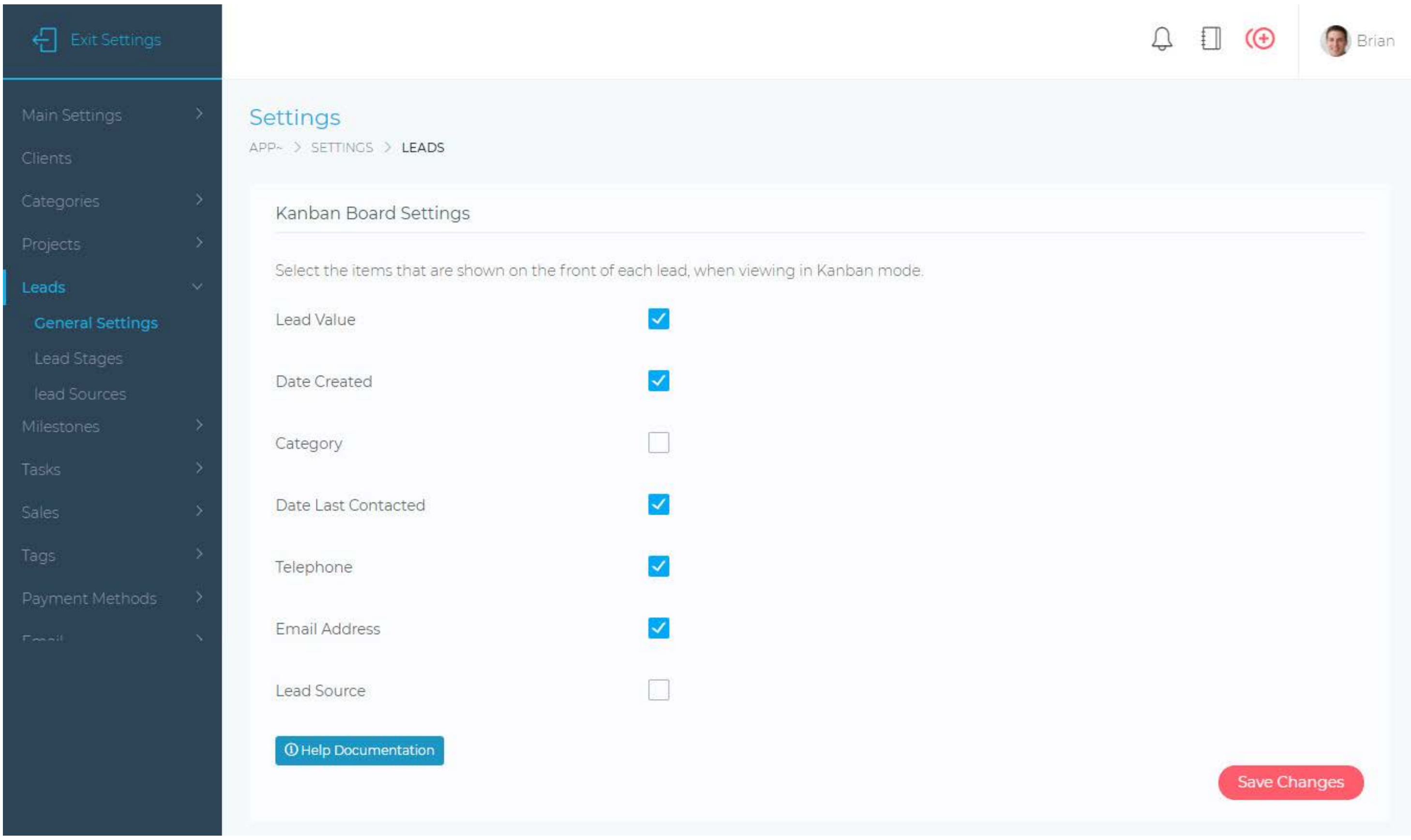
From the leads settings page, you will be able to apply settings for how the application will handle leads. Below are the available settings.

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

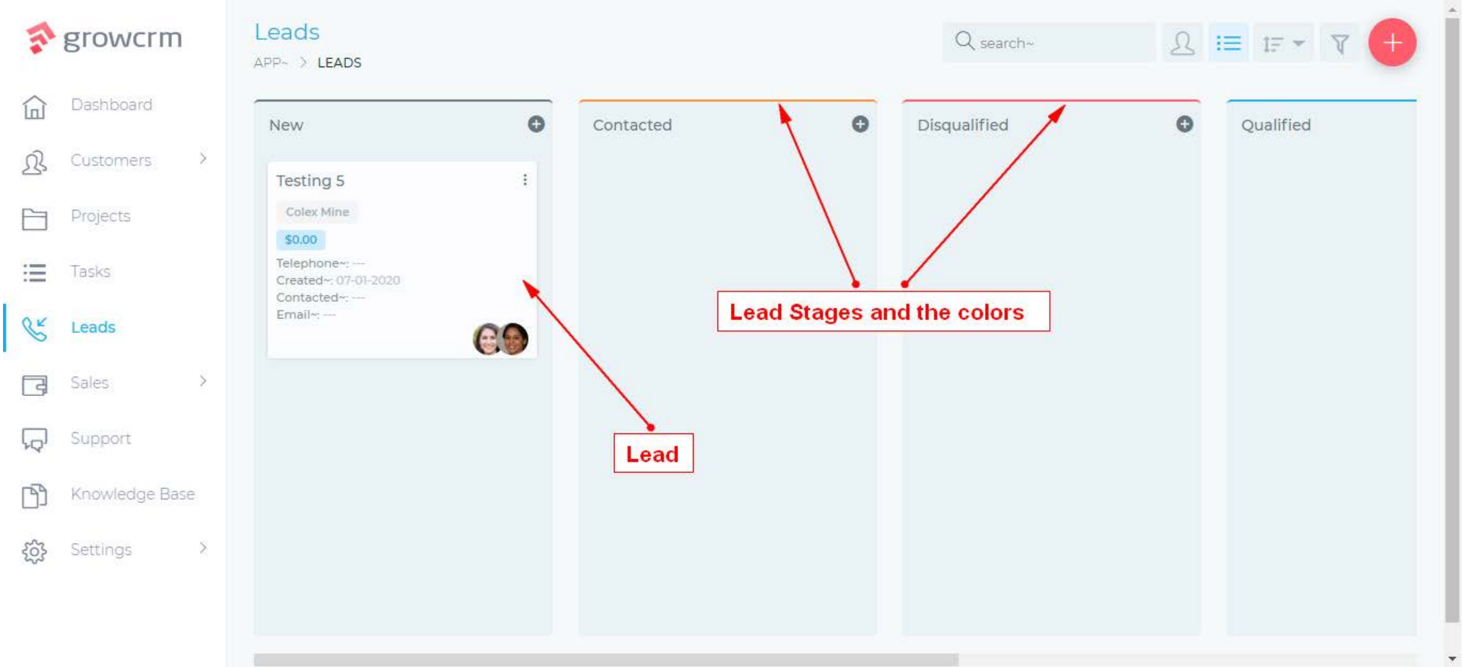


Lead Stages

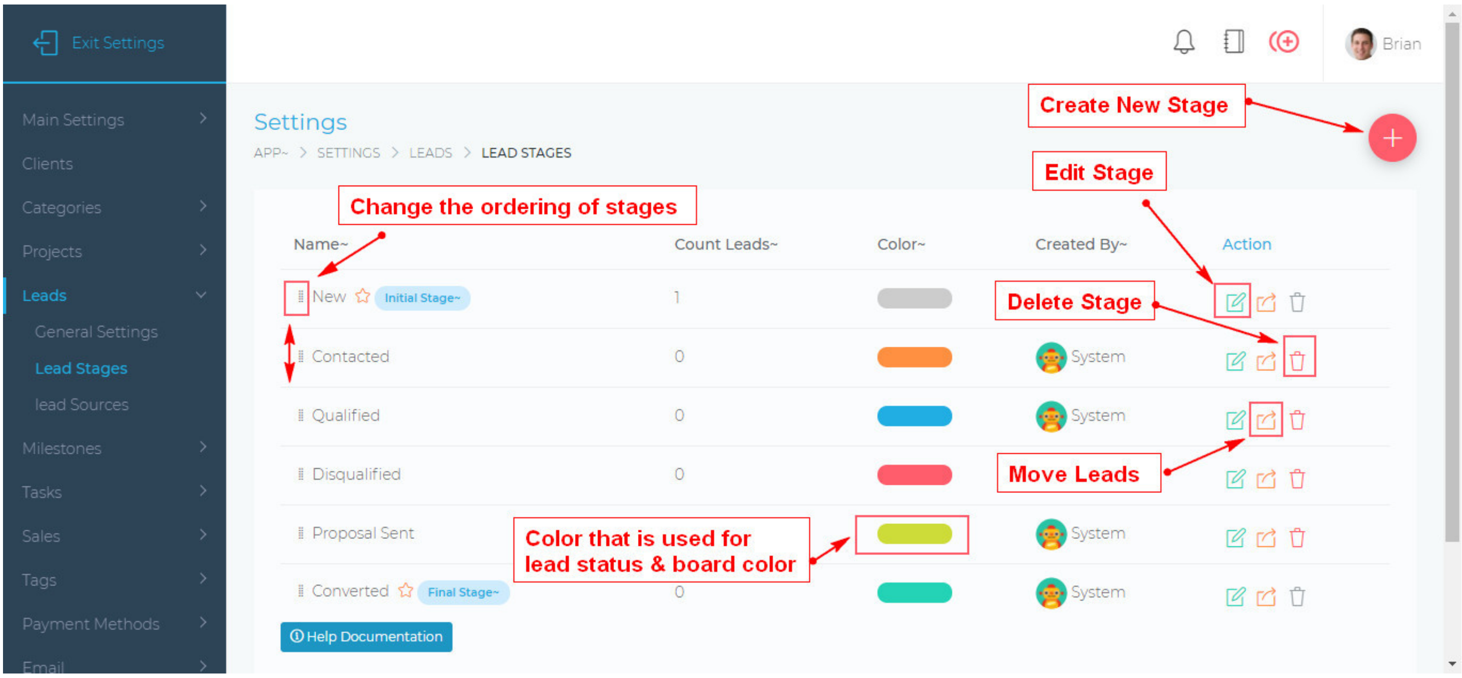
Lead stages are the various stages that a lead moves through. When you get a new lead, it will be placed in the New stage. As you make progress with the lead, you can move it to Qualified -> Contacted – – – – > Converted.

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.



The image below shows the Lead Stages settings

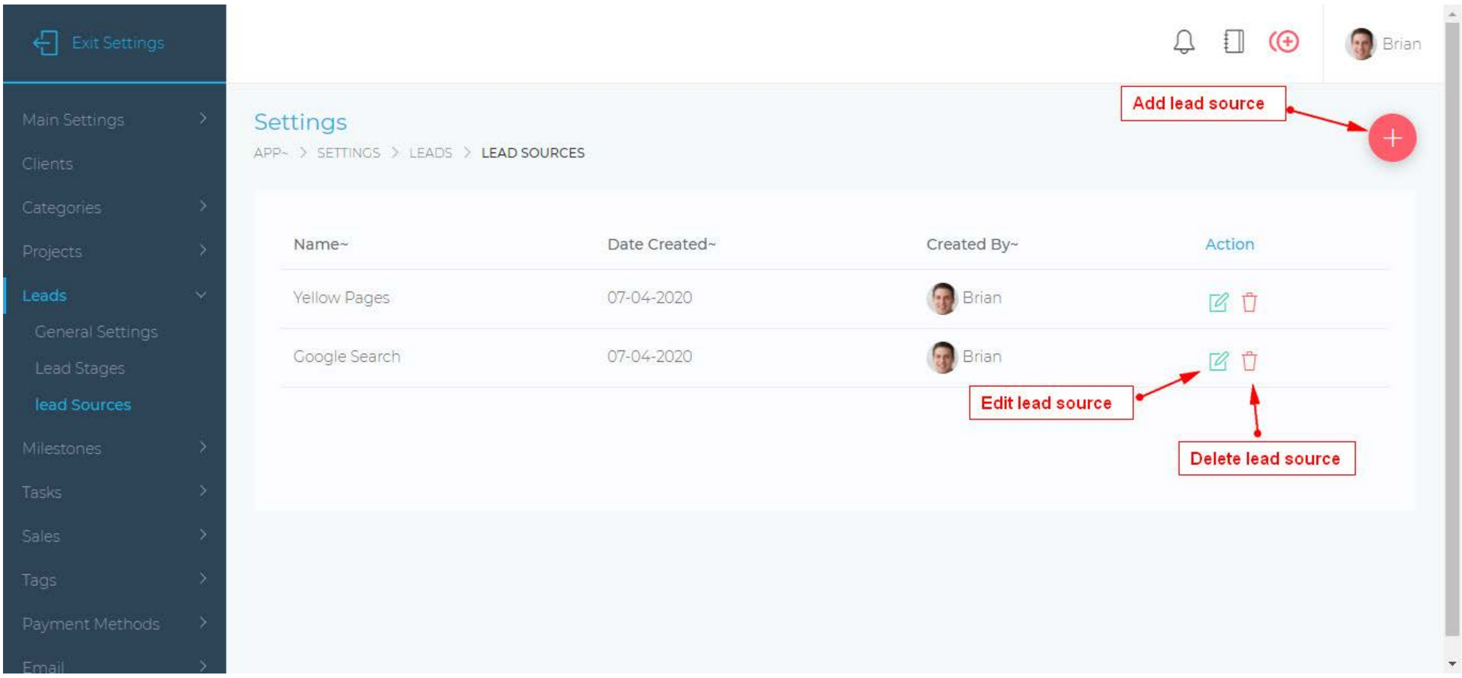


From the screen above, you will be able to carry out the following action:

- 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)

Lead Sources

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.



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

- Add new lead soruces.
- 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.

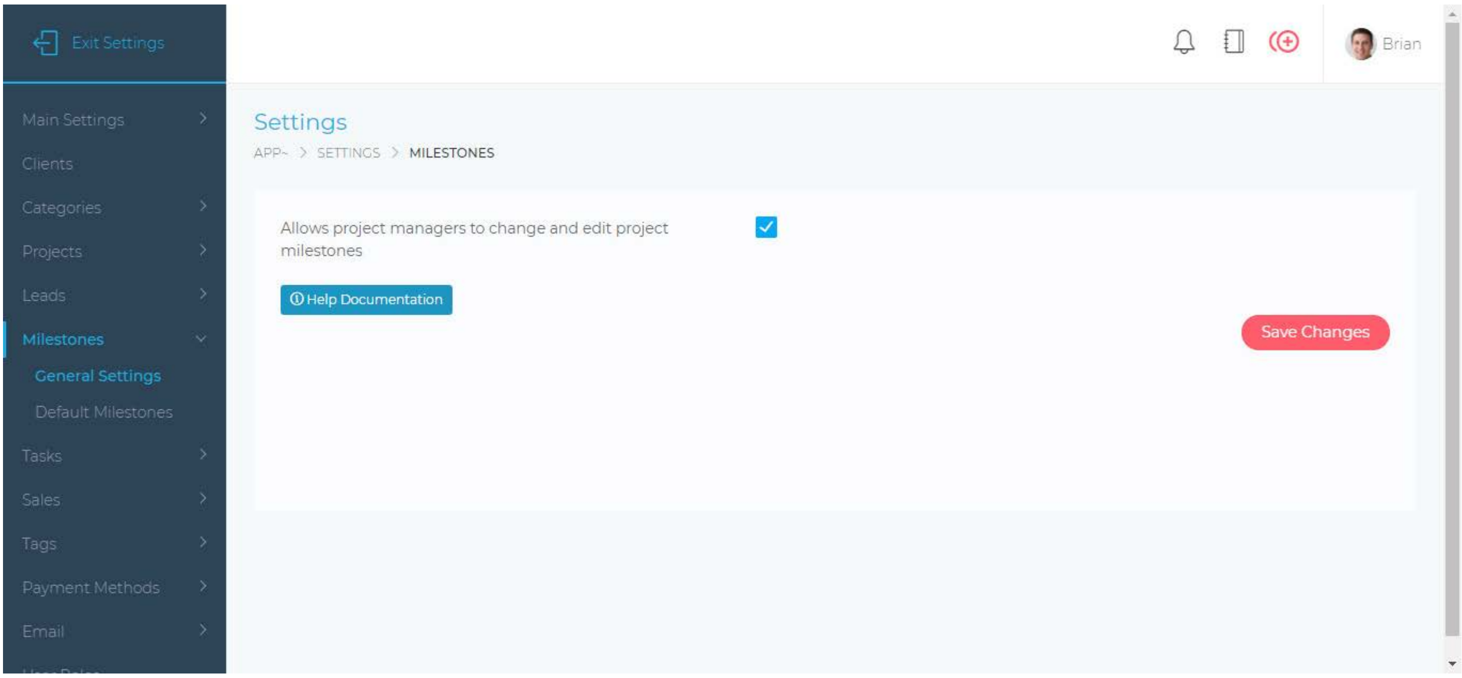
10. Milestone Settings

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:

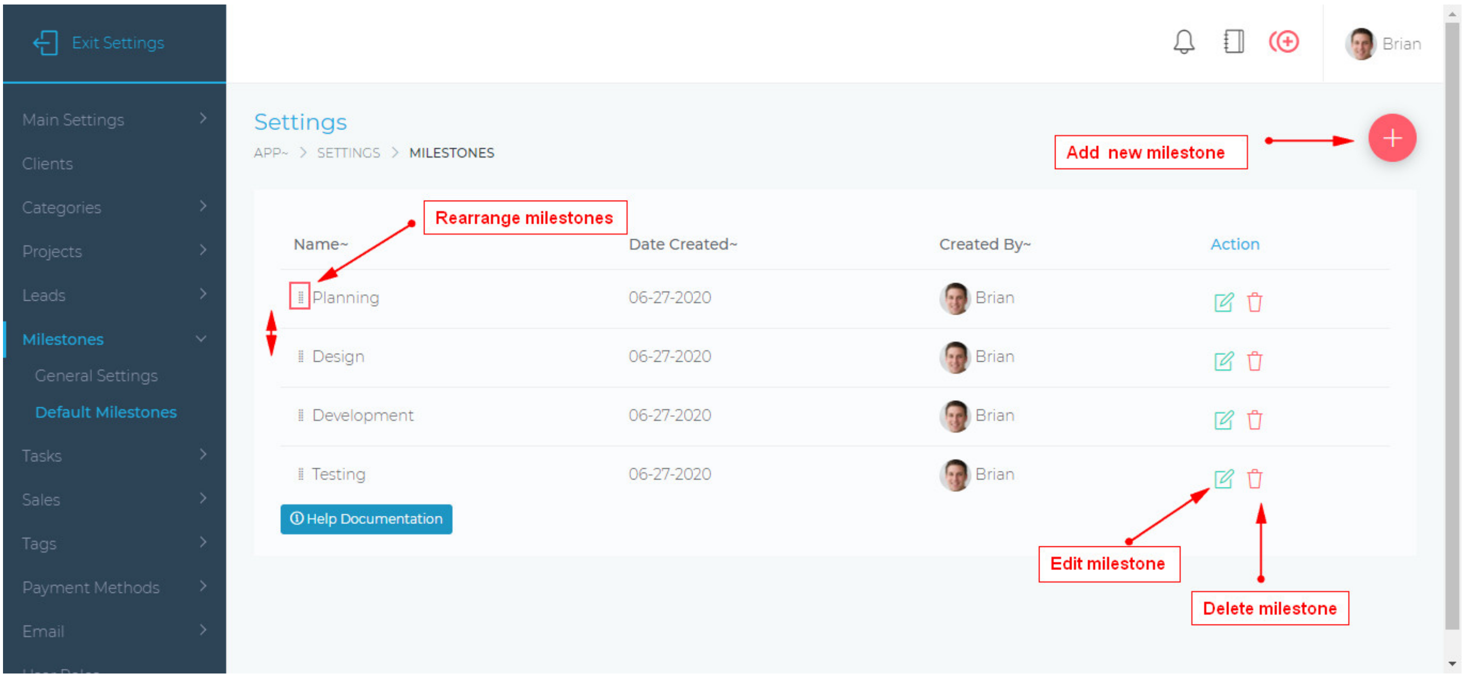
- Set whether team members can create, edit, delete project milestones.



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.



On this screen, you will able to do the following

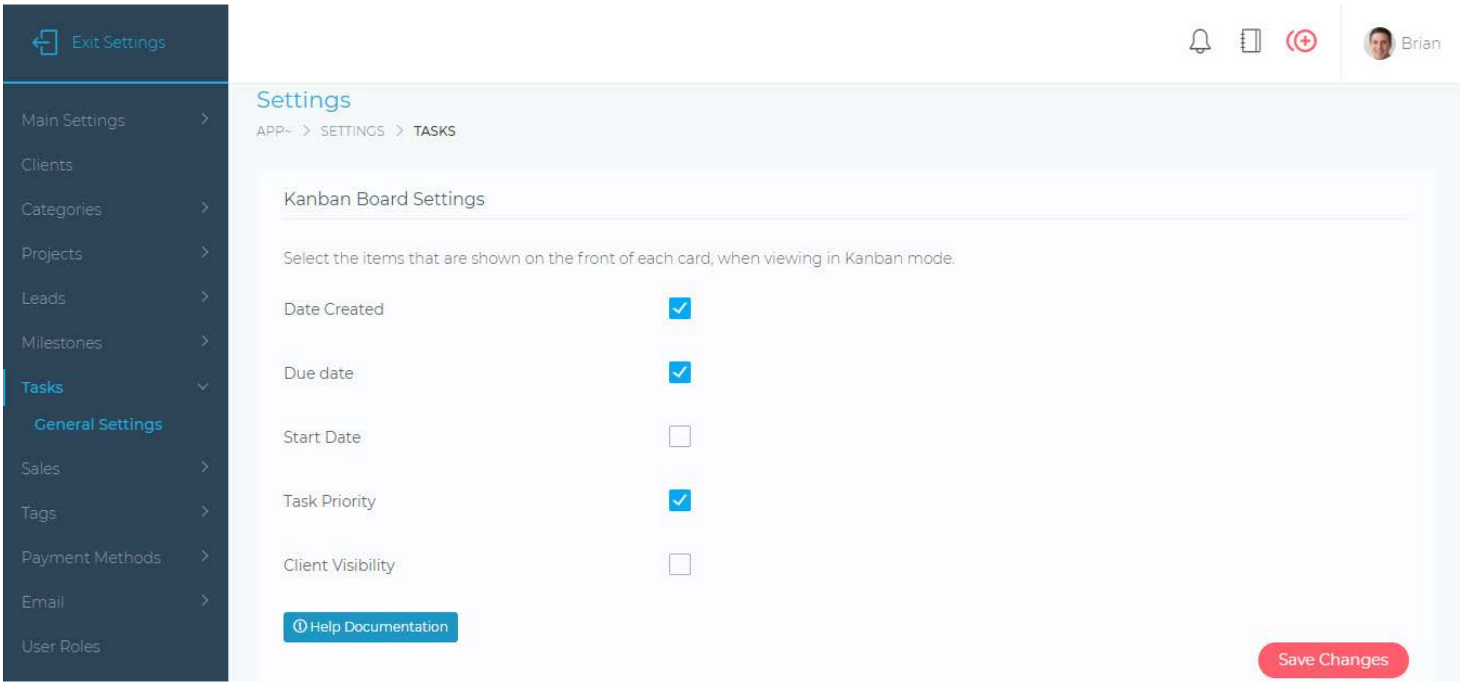
- Create default milestones.
- Rearrange the position of milestones (as displayed in a project).
- Edit and delete default milestones.

11. Task Settings

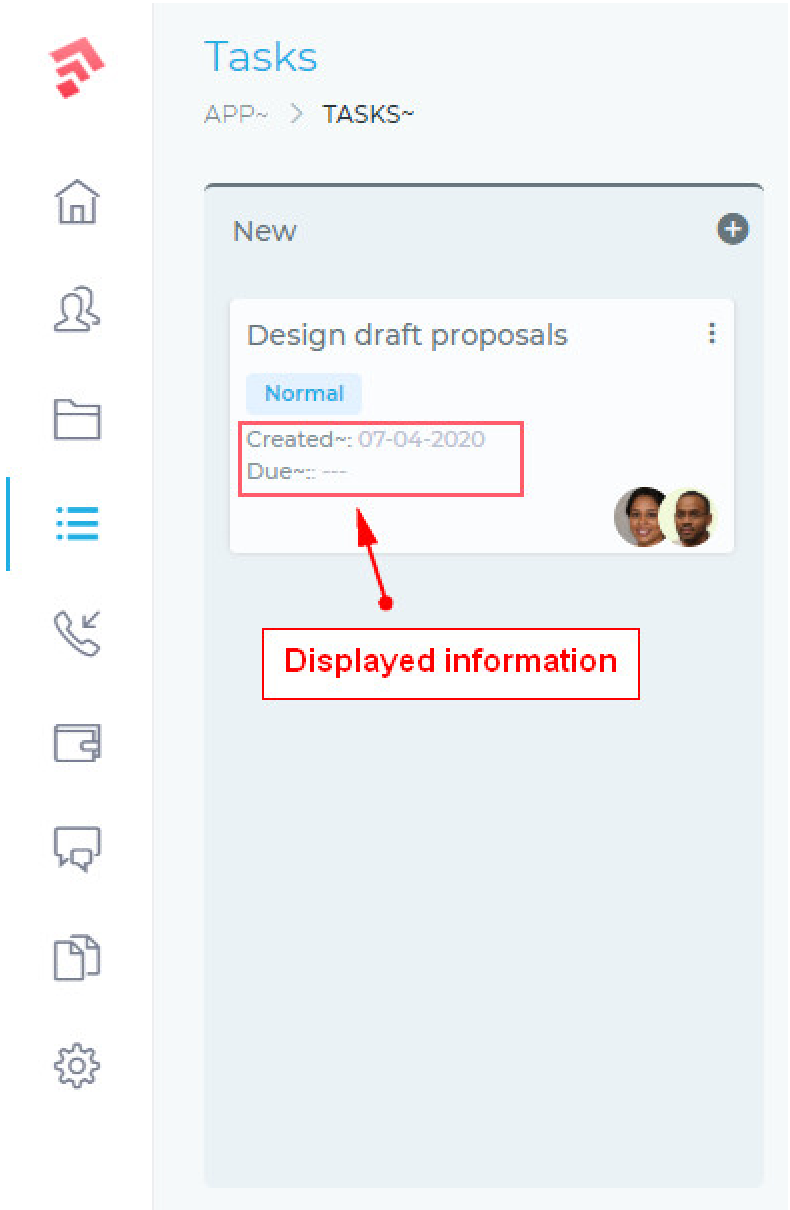
You are here: Main ▫ Settings ▫ 11. Task Settings

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

General Settings

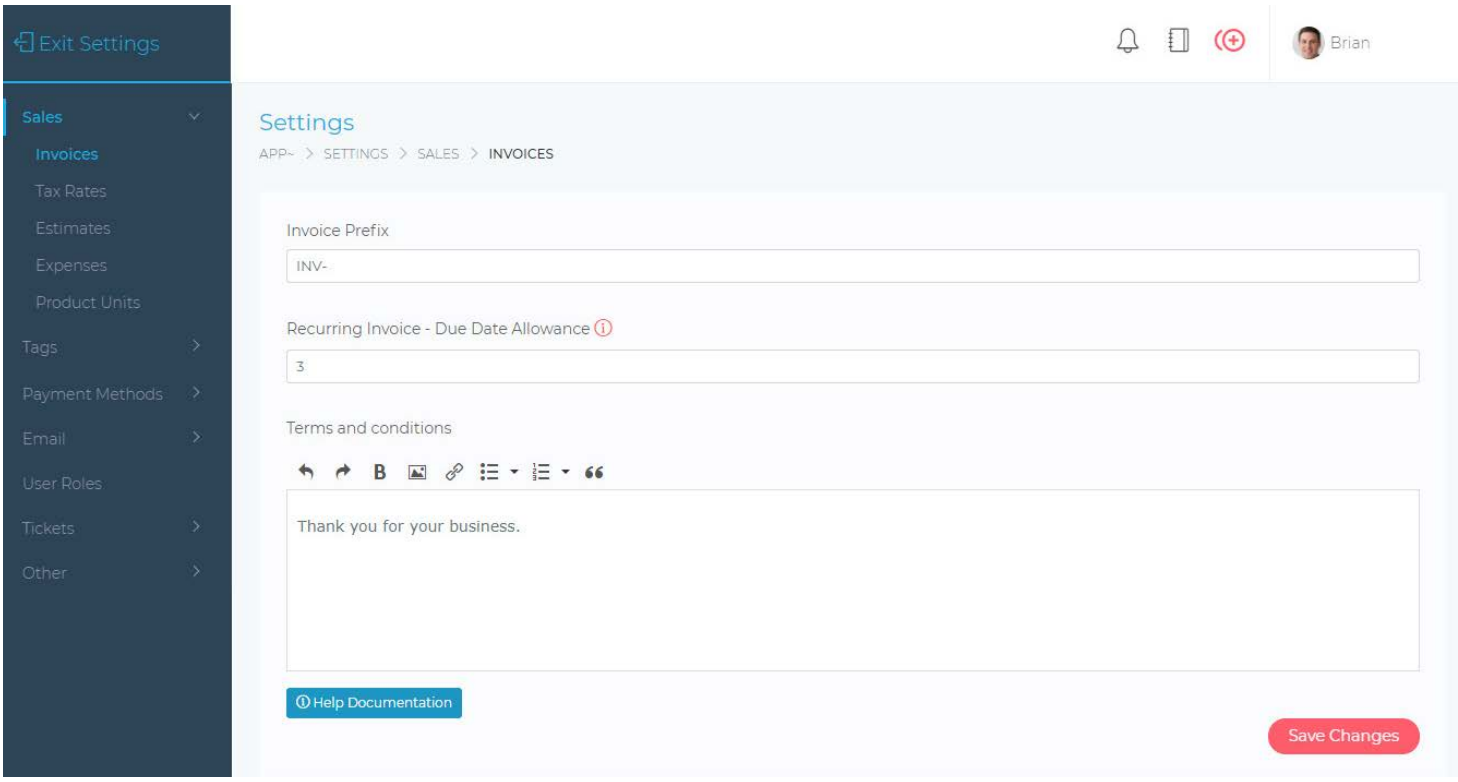


From this page, you can specify what information is displayed on the task card, when viewing in kanban mode. An example is shown below.


Tasks
APP~ > TASKS~
New
Design draft proposals
Normal
Created~: 07-04-2020
Due~:: ---
Displayed information

12. Invoice – Settings

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

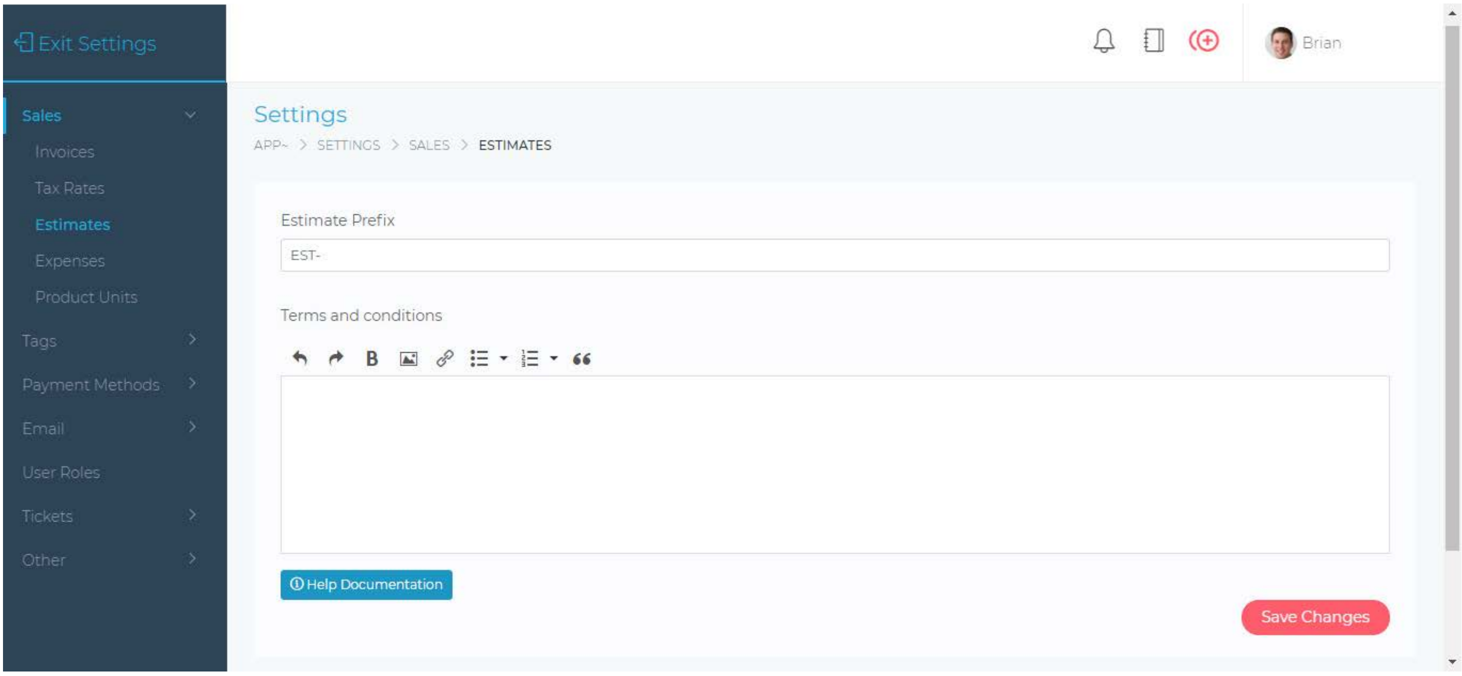


On this page you will be able to apply the following settings:

- 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

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

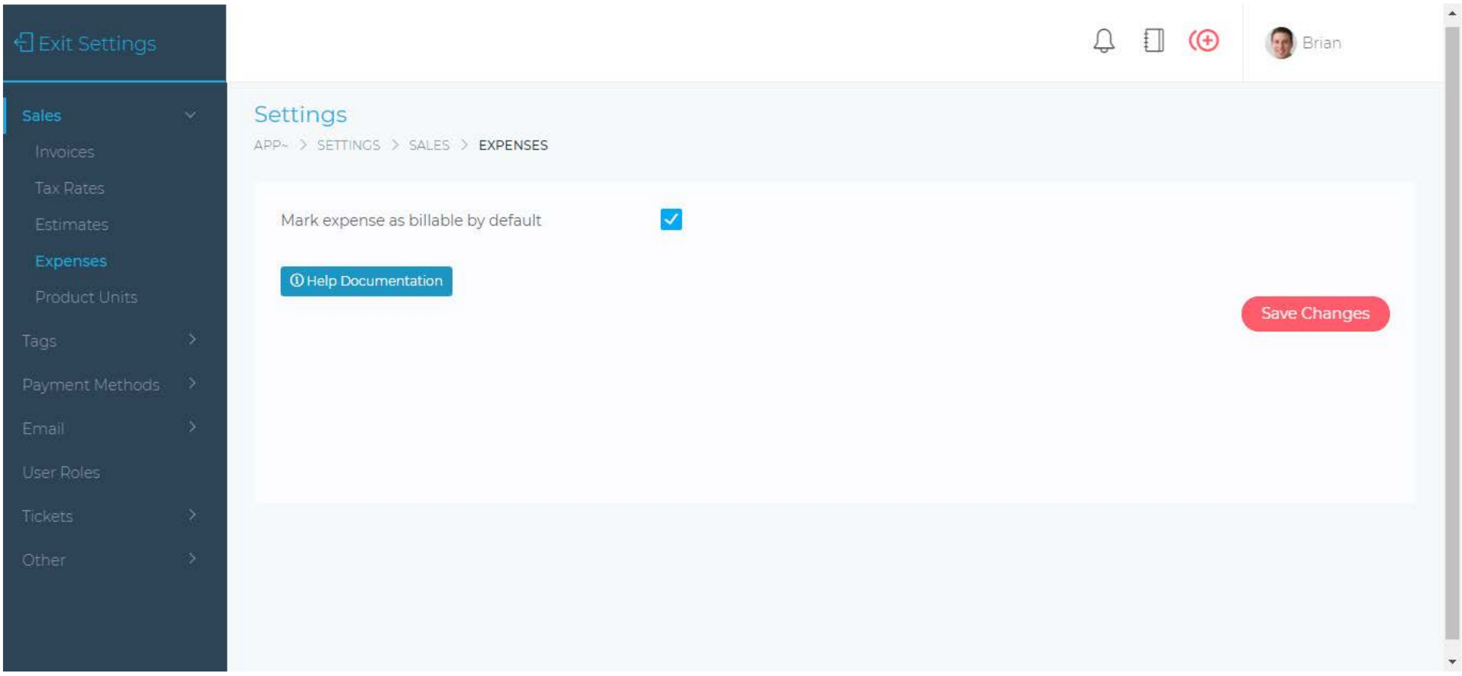


On this page you will be able to apply the following settings:

- 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

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

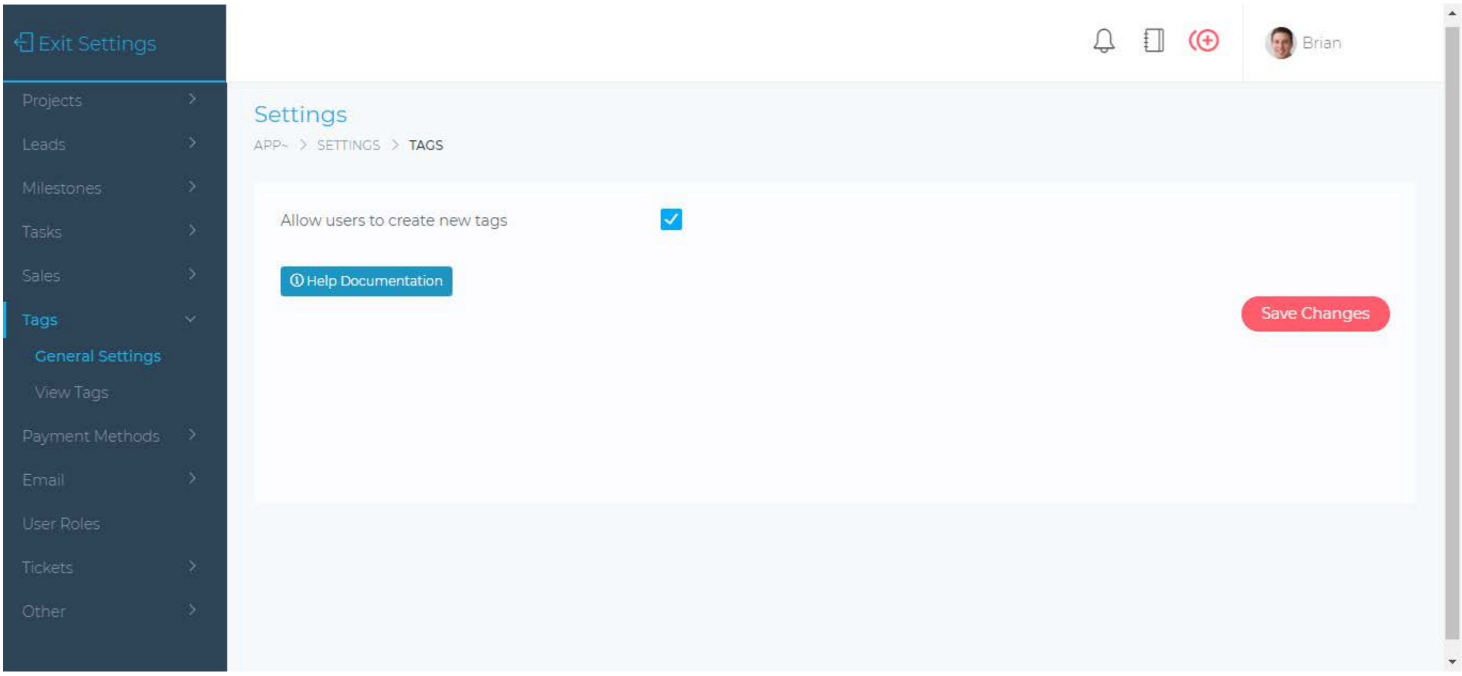


- Mark expense as billable by default – When enabled, every new expense that is being created will be marked as billable. This setting can be changed when creating a new expense.

15. Tag Settings

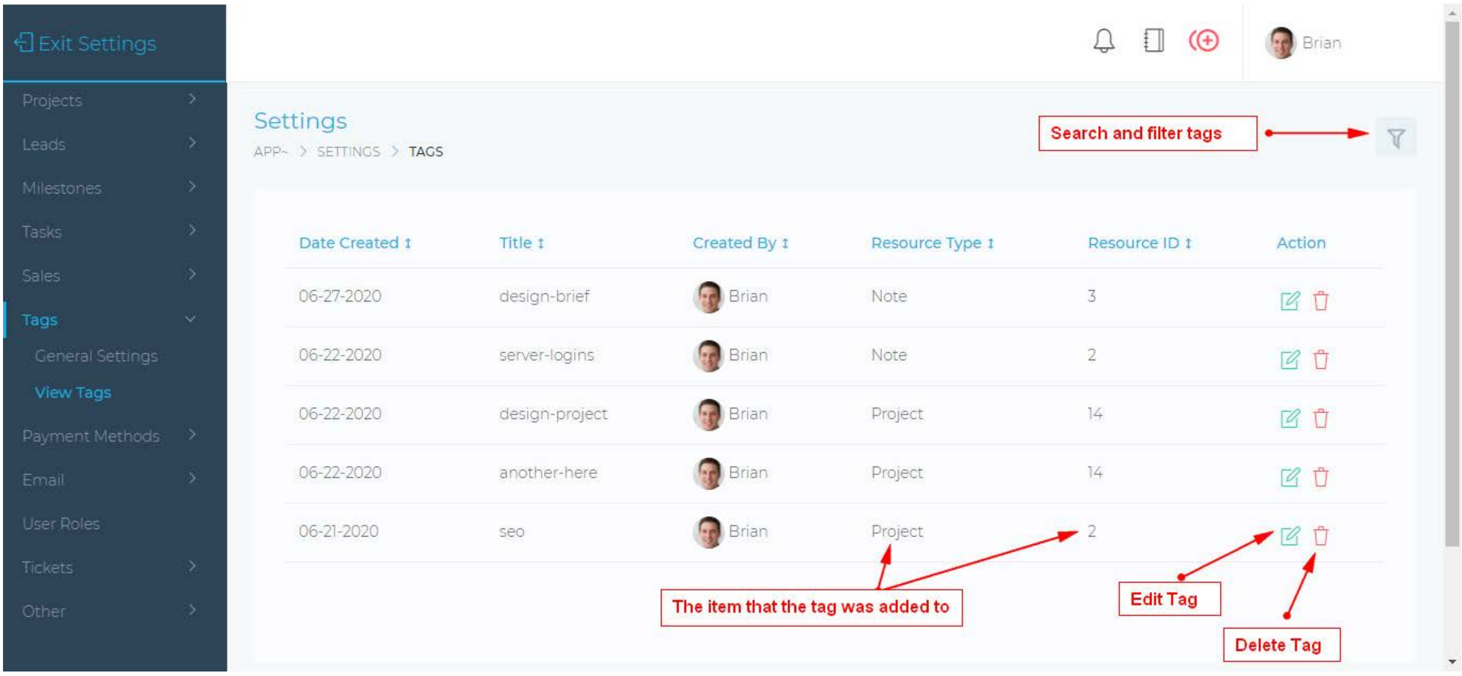
The tag settings page allows you to change various aspects of how the Dashboard handles tags. Below are the various settings and their explanations.

General Tag Settings



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

View Tags



From this page you can do the following:

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

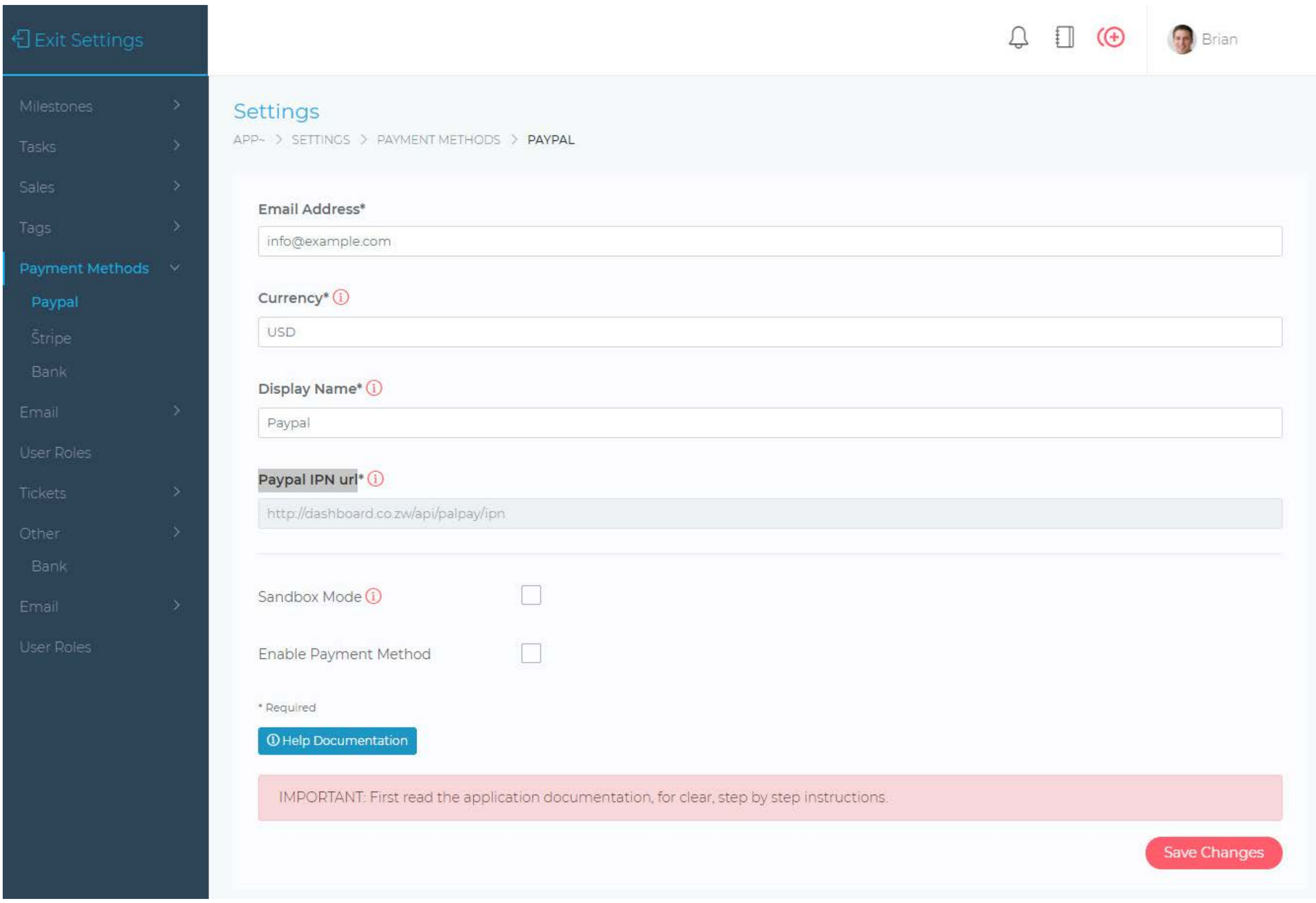
16. Paypal Payment Gateway

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.

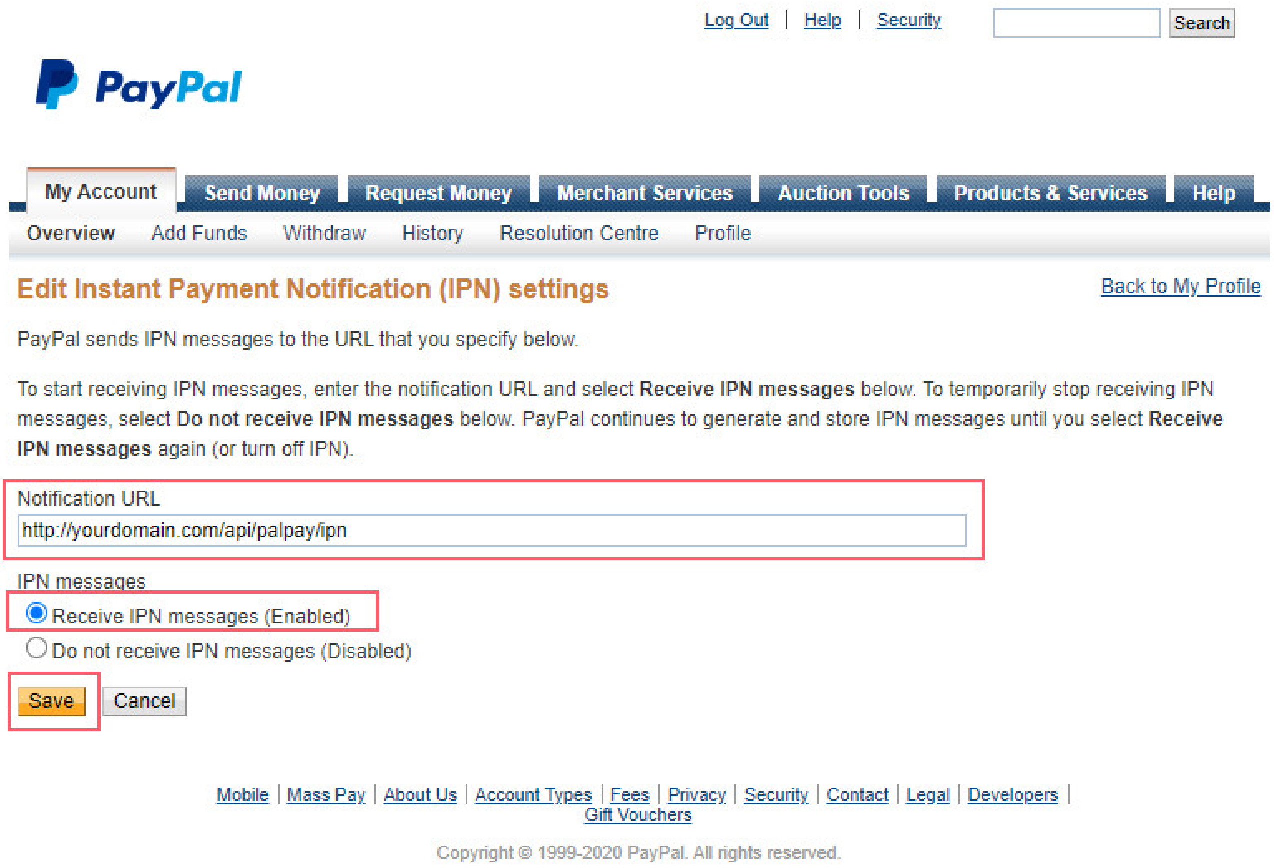


Important: Paypal IPN URL

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



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.

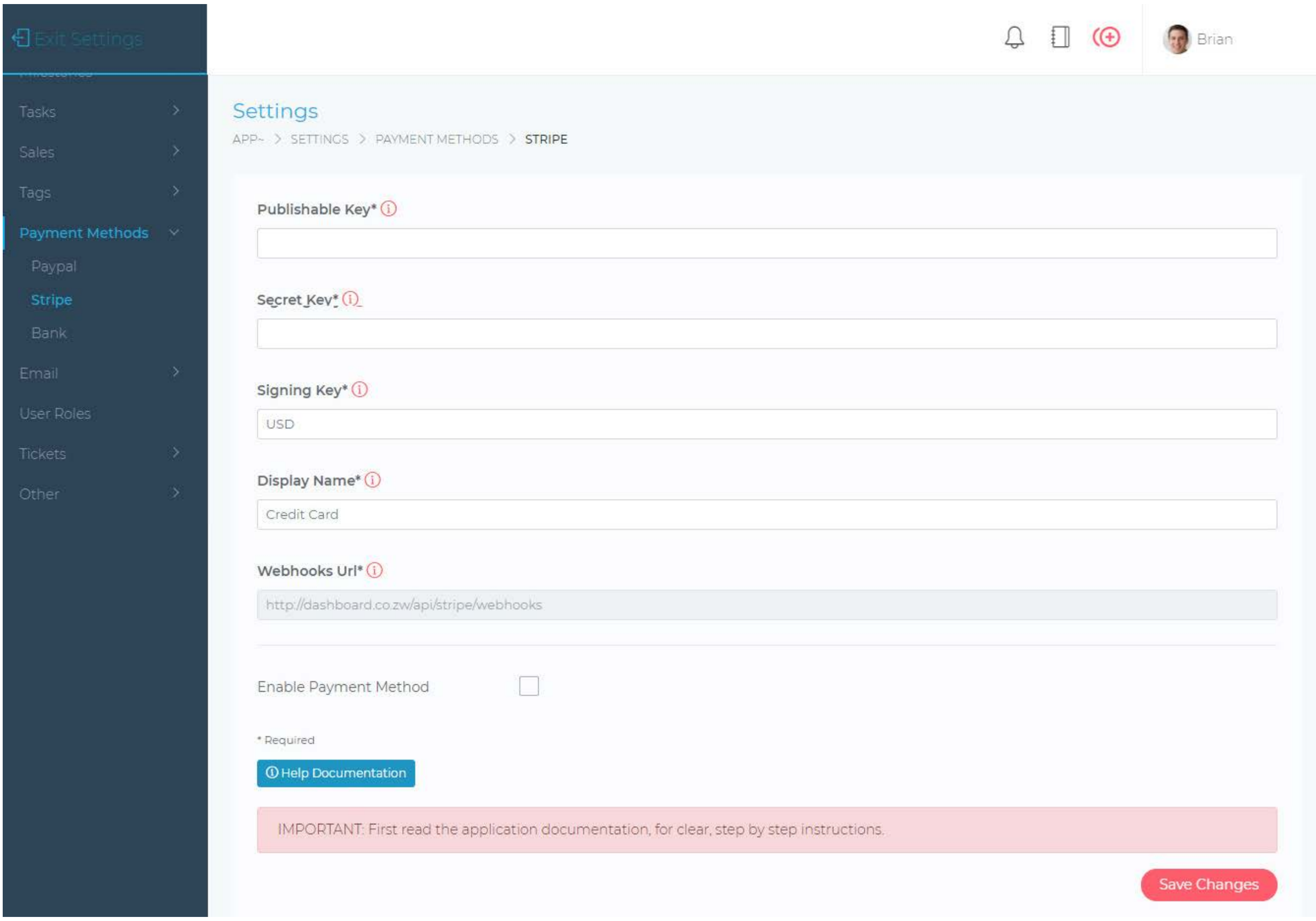
Enable Payment Method

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



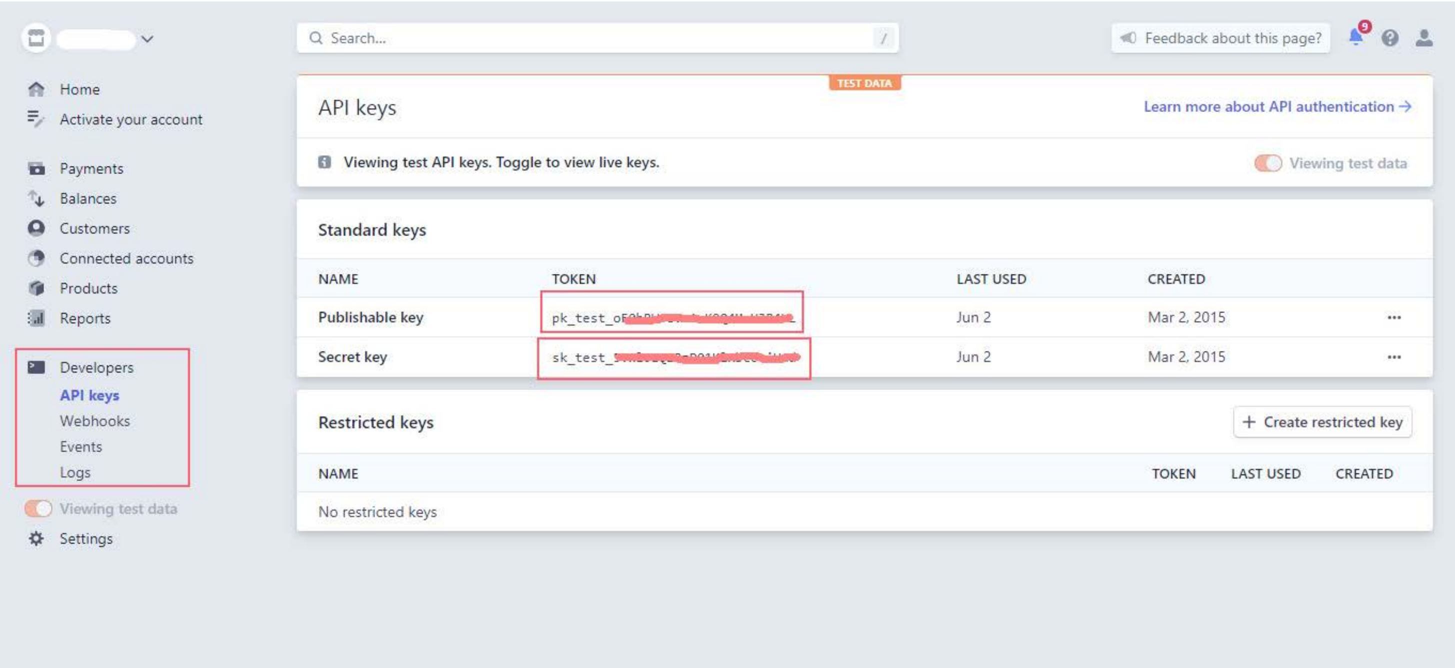
Information Required

- 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



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.

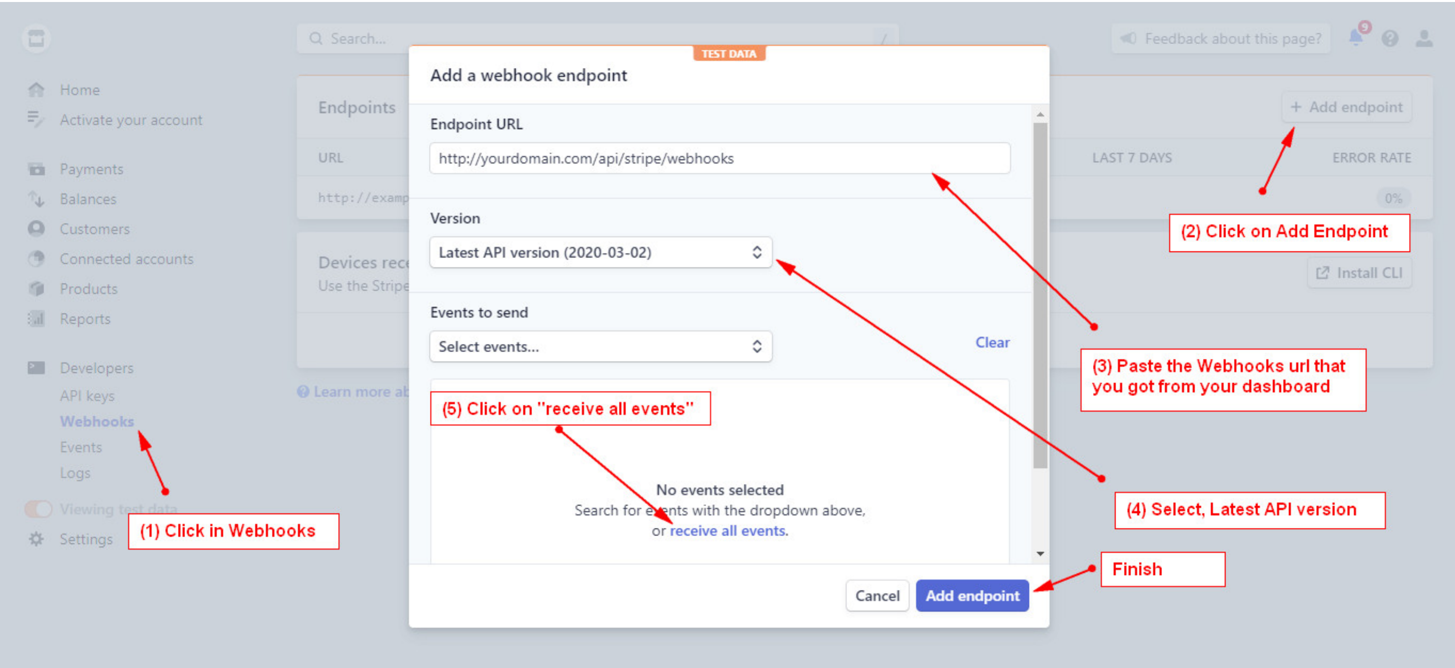
If you do not complete this step, payments will not be processed corrently.

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 Grown CRM dashboard.

Enable Payment Method

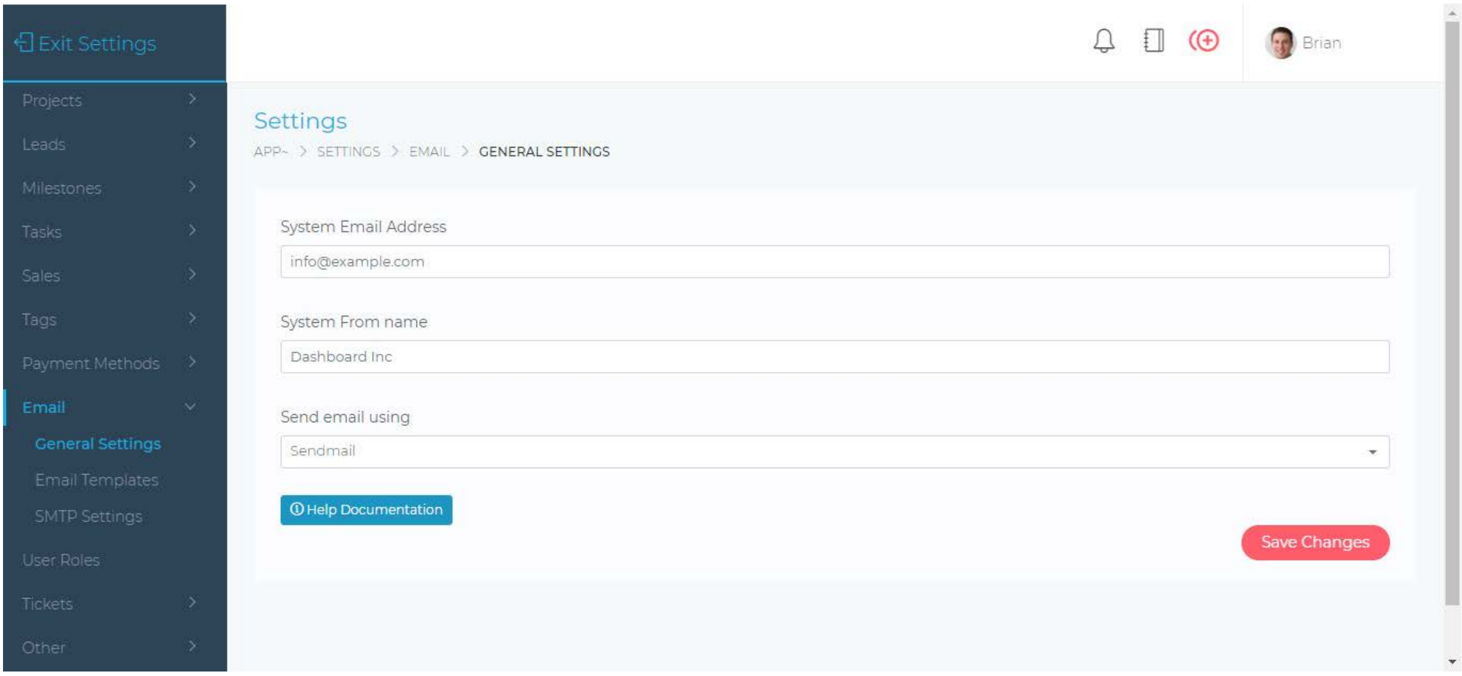
Remember to check the (Enable Payment Method) box if you are ready to start using the Stripe payment gateway.

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



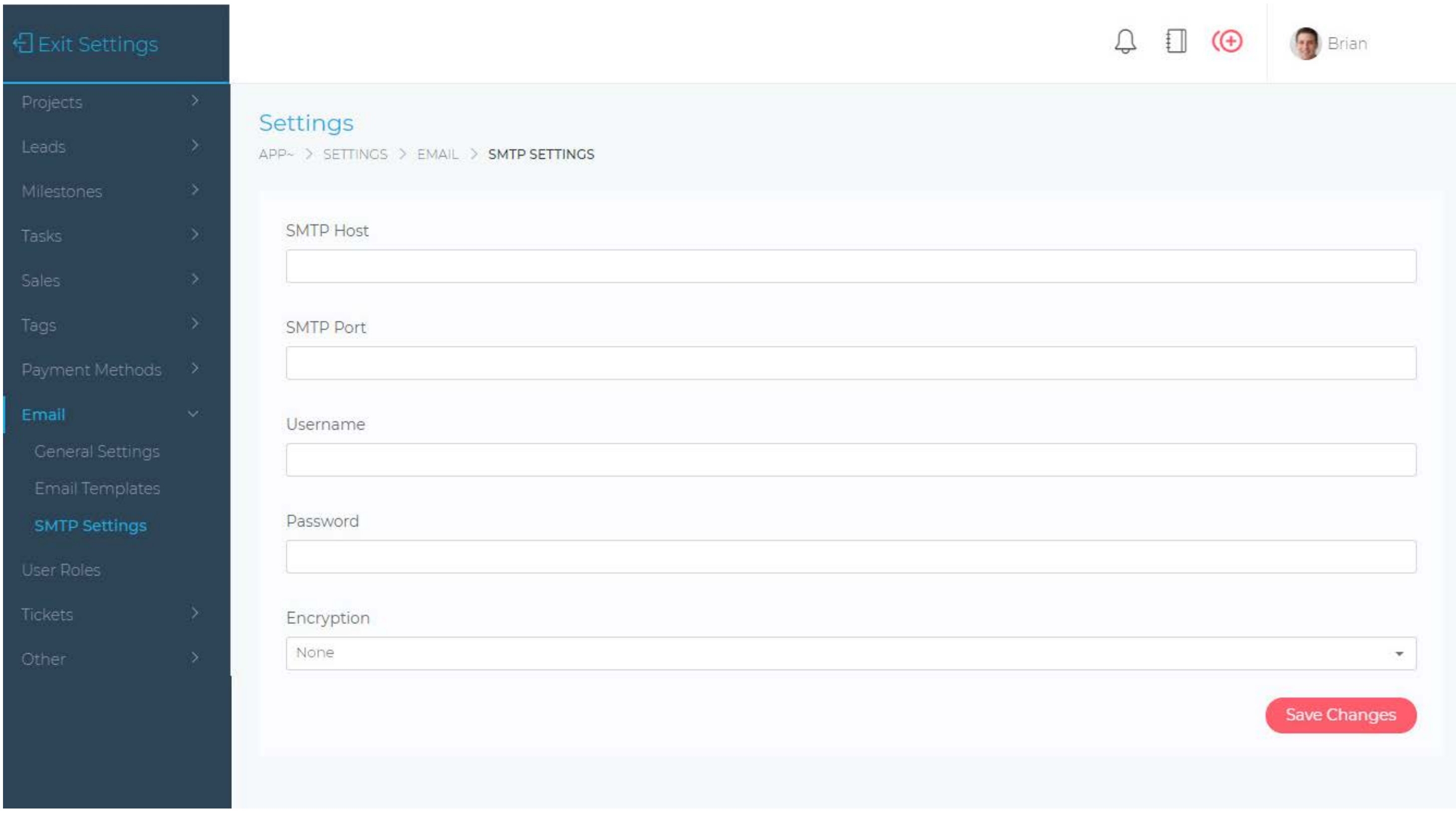
On the page shown above, you will be able to apply the following settings:

- 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 you 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.



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.

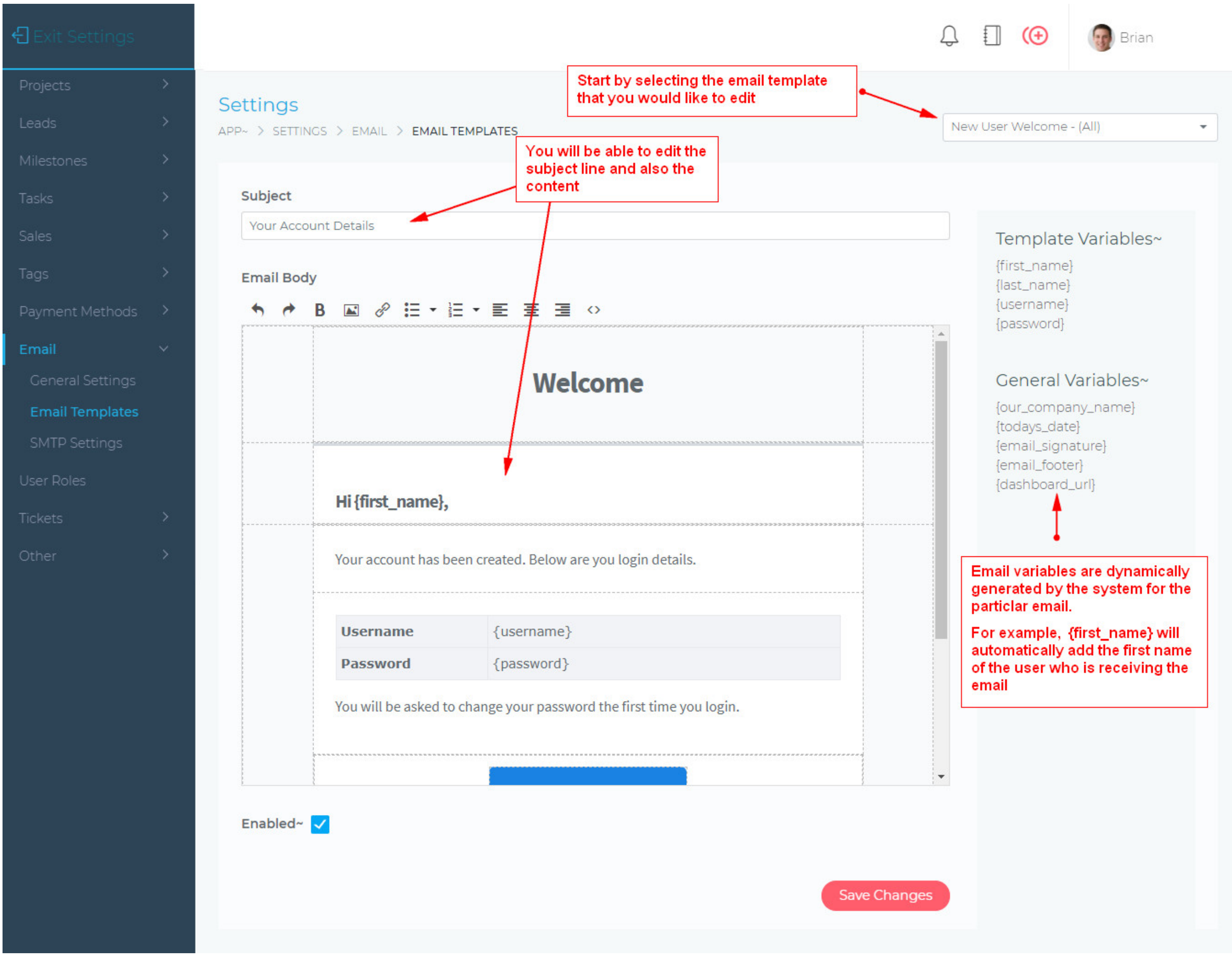
19. Email Templates

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.



20. User Roles

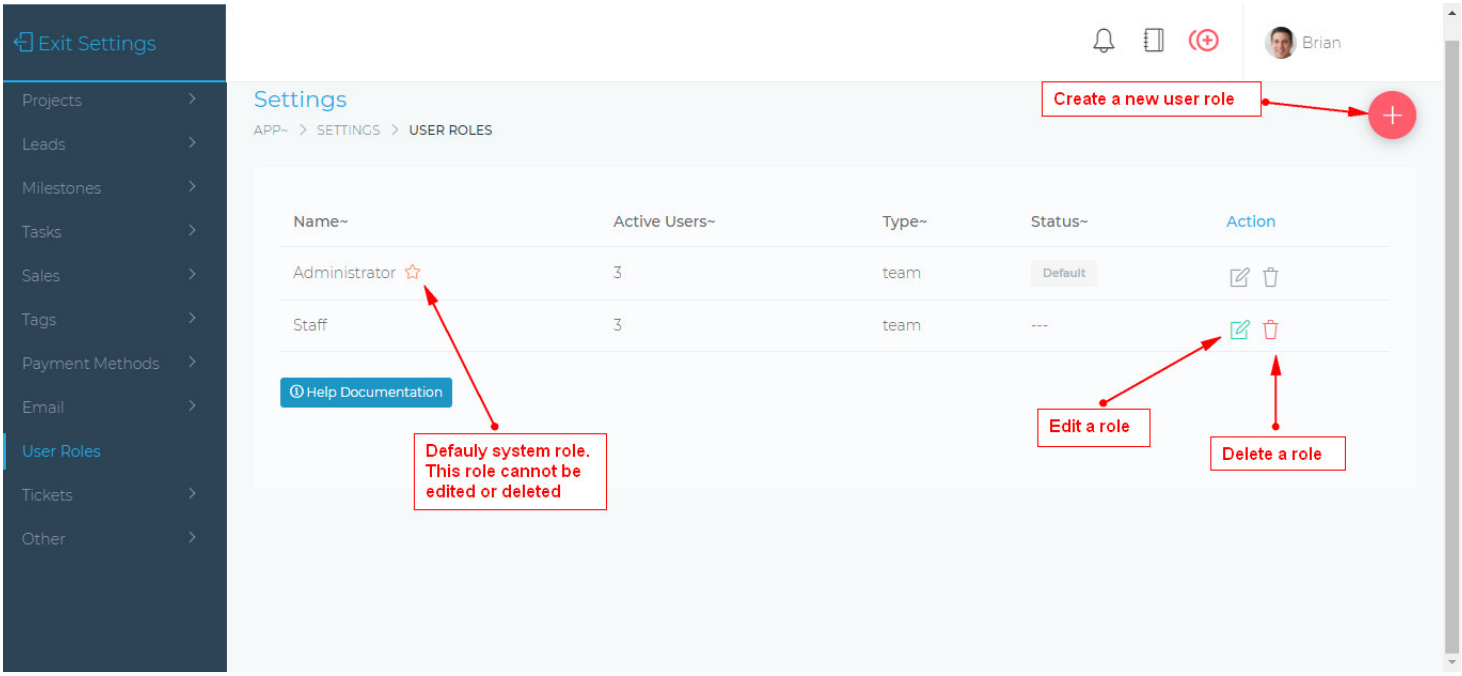
User roles define the permission levels that a user in that role will have when using the application.

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

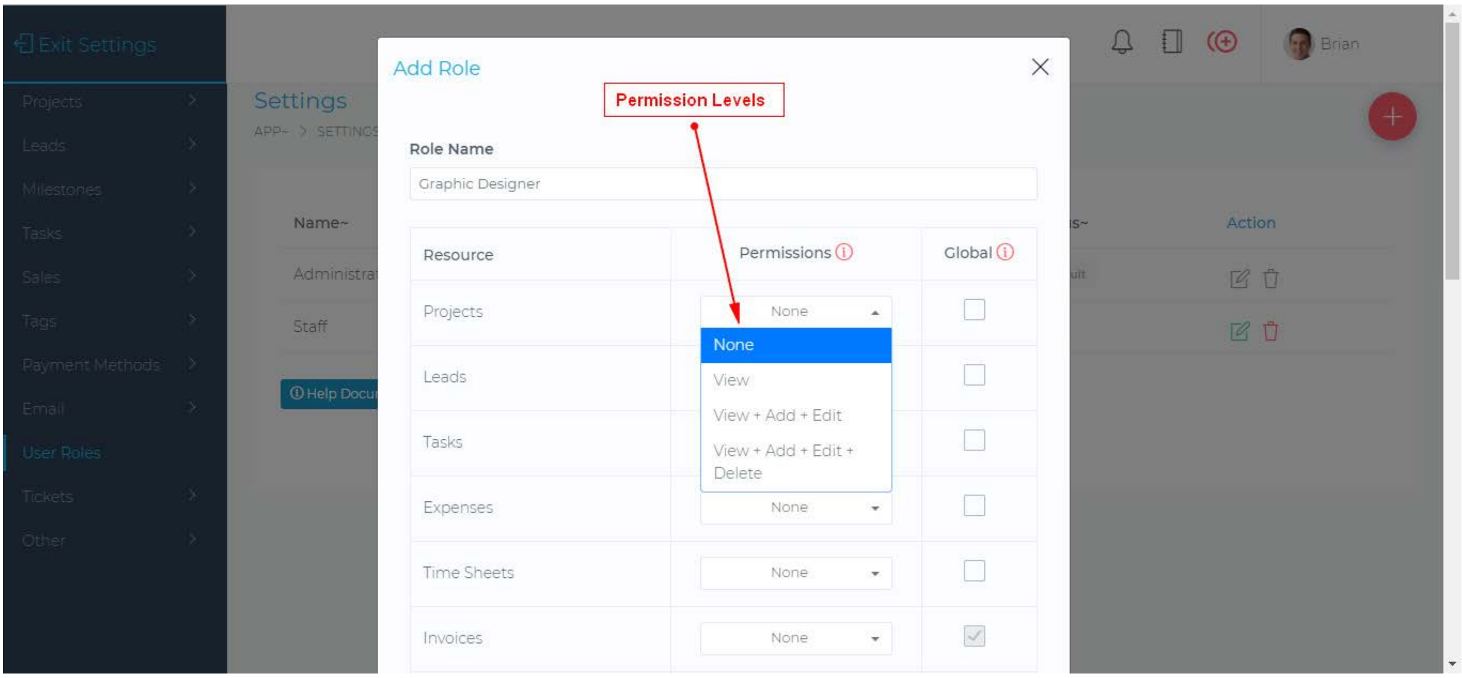
A user role grants very specific permissions for a particular resource in the dashboard. This means you can control exactly how much access a user will have on a give application resource (e.g. Projects)

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.



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.

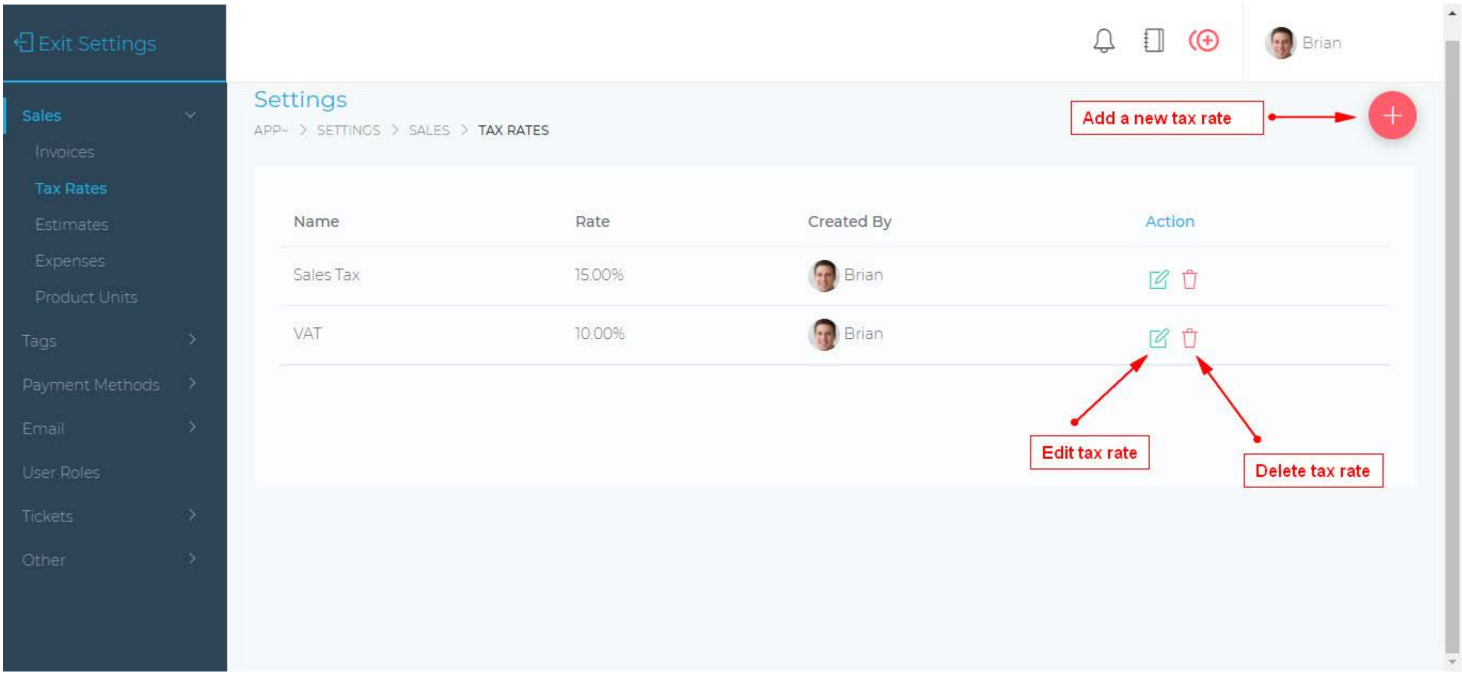
IMPORTANT: Role permissions by default, only apply to a resource that a user has been assigned to or a resource that the user has created themselves. If you want the role to grant permissions to all resources of that type, you must click on the Global option.

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

22. Tax Settings

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.



23. Knowledge Base

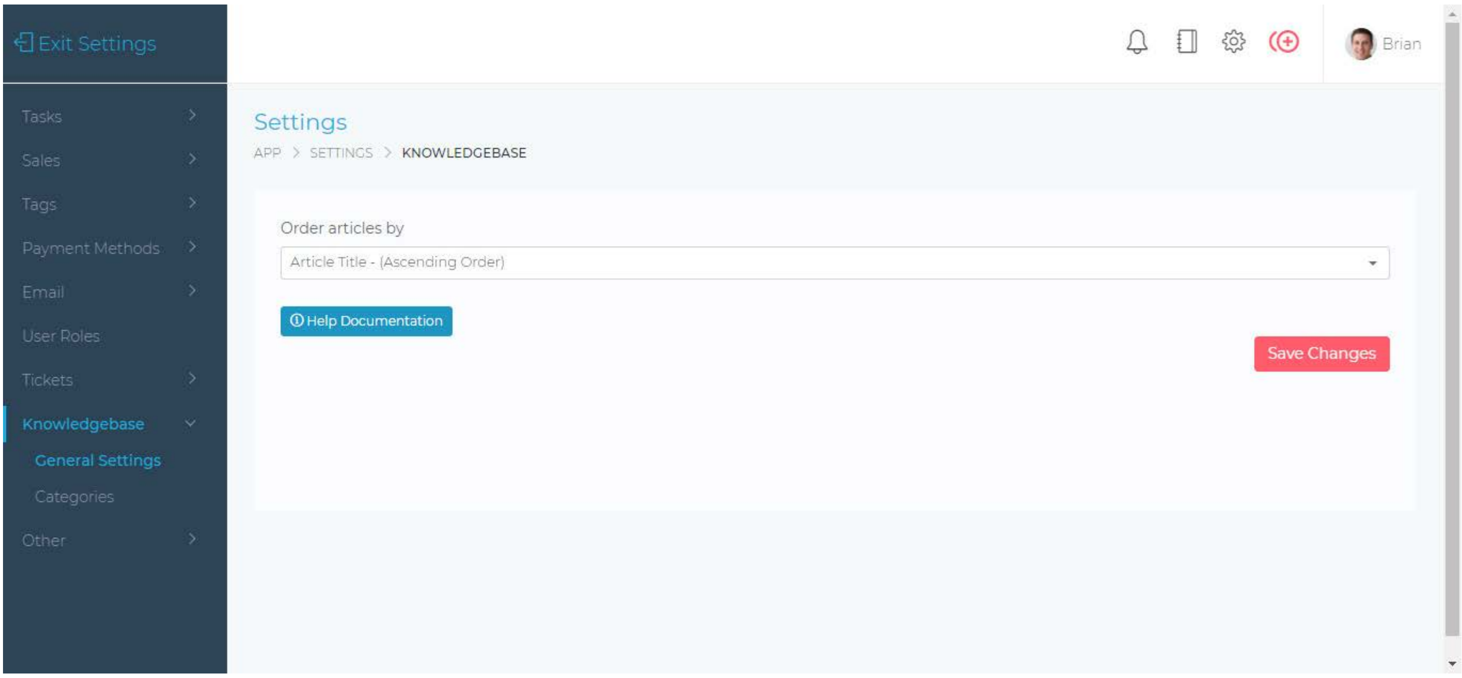
You are here: Main □ Settings □ 23. Knowledge Base

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

General Settings

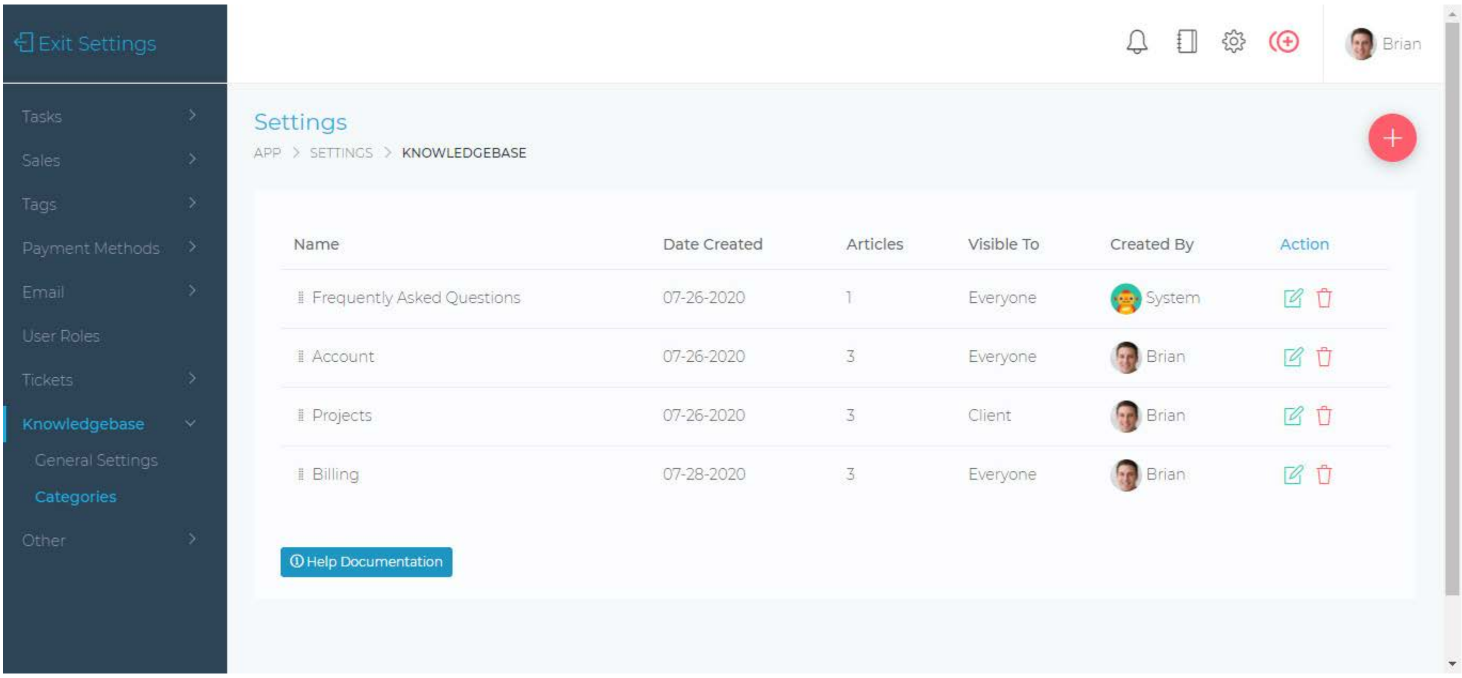
From this page, you can set the following information;

- 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



Knowledge Base Categories

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



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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Date: August 1, 2020 | By: brian | Categories: Getting Started

Read More

---

2. Installation

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Read More

---

3. Nginx Server Instructions

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Read More

---

4. Common Installation Errors

Date: August 12, 2020 | By: brian | Categories: Getting Started

Read More

Page 1 Page 2 Next

1. Clients Overview

Date: July 19, 2020 | By: brian | Categories: Clients

Read More

---

2. Create, Edit & Delete Client Accounts

Date: July 19, 2020 | By: brian | Categories: Clients

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3. Client Management

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1. Projects Overview

Date: July 19, 2020 | By: brian | Categories: Projects

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2. Create Projects

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3. Project Management

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2. Tasks

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Read More

---

3. Time Tracking

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Read More

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1. Leads Overview

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1. Estimates Overview

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2. Creating Estimates

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3. Editing Estimates

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---

1. Invoices Overview

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Read More

---

2. Creating Invoices

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Read More

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2. Editing Invoices

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Read More

---

4. Recurring Invoices

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---

5. Invoice Products

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1. Expenses Overview

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1. Expenses Overview

Date: July 25, 2020 | By: brian | Categories: Expenses

Read More

1. Tickets Overview

Date: July 26, 2020 | By: brian | Categories: Tickets

Read More

1. Knowledge base overview

Date: August 1, 2020 | By: brian | Categories: Knowledge Base

Read More

1. Main Settings

Date: July 4, 2020 | By: brian | Categories: Settings

Read More

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2. Company Settings

Date: July 4, 2020 | By: brian | Categories: Settings

Read More

---

3. Chage Company Logo

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Read More

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4. Theme

Date: July 4, 2020 | By: brian | Categories: Settings

Read More

---

5. Cron Job Settings

Date: July 4, 2020 | By: brian | Categories: Settings

Read More

Page 1 Page 2 … Page 5 Next

1. Start Here – Error Logs

Date: August 2, 2020 | By: brian | Categories: Errors & Debugging

Read More

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2. Common Errors & Issues

Date: August 2, 2020 | By: brian | Categories: Errors & Debugging

Read More

---

5. Installing Updates

Date: August 17, 2020 | By: brian | Categories: Getting Started

Read More

Previous Page 1 Page 2

6. Client Settings

Date: July 4, 2020 | By: brian | Categories: Settings

Read More

7. Category Settings

Date: July 4, 2020 | By: brian | Categories: Settings

Read More

8. Project Settings

Date: July 4, 2020 | By: brian | Categories: Settings

Read More

9. Leads Settings

Date: July 4, 2020 | By: brian | Categories: Settings

Read More

10. Milestone Settings

Date: July 4, 2020 | By: brian | Categories: Settings

Read More

Previous Page 1 Page 2 Page 3 … Page 5 Next

22. Tax Settings

Date: July 5, 2020 | By: brian | Categories: Settings

Read More

---

23. Knowledge Base

Date: August 1, 2020 | By: brian | Categories: Settings

Read More
