Noregrets SMS Documentation

Release v2

Hamsoft Uganda

Aug 17, 2019

Configuration

This documentation will help you learn all about using the dashboard system , Setting Your System with Our API and much more.

Update

Note: We recommend you having a backup your of your SMS database with all status.

To update your CRM got to **Settings > System info** and click on **Schedule Update**. Enter the time when the app should update and timezone.

Attention: All Your requests will be set to maintanance mode and maintanance status codes deisplayd when performing an update to the API and restored after the update process has completed.

If you're moving your messages and receivers to another provider or servers make sure to request that data with the provided endpoints.

You can manually run the update with the following command.

```
      GET /api/v1/invoices
Accept: application/json
Authorization: Key: $ApiKey
```

GET - /api/v1/messages/

Tip: You can see the detailed changelogs for each release.

1.1 Version 2.0

Copy .env.example to .env and set config settings

Check that `/path/to/workspace/storage` has 755 permissions and is owned by the webserver user

CHAPTER 2

Changelogs

2.1 Version 2.0.0

- Initial release

API

Send and Access your SMS , Create USERS Lists , Groups and configure WEBHOOKS using a RESTful API . Noregrets provides a RESTful API. Below are the API Endpoints you can use;

3.1 Authorization

To access the API, you first need to copy your Api Key. Go to https://noregrets.ug/#get_started create an account and login, on the left navigation menu next to the profile avatar image and then click **Get API **. Upon Activation then Click on **Go to API Console ** In the Console click on your profile and and copy your API Key.

Note: Insert your API Key directly into the authorization header on any API requests. Example below;

```
curl -X GET
-H "Authorization: Key <api_key>"
-H "Content-Type: application/json"
"https://{endpoint}/api/v1/messages"
```

3.2 Authentication Errors

If the apiKey is invalid or expired you will receive a response with the status code set to **HTTP 401 Unauthorized**.

If the access_token is valid but you don't have enough scope to perform this request you will receive a response with the status code set to **HTTP 403 Forbidden**.

3.3 HTTP-Codes

Actions and errors yield different HTTP response codes. Please have a look at the expected response codes in the following list.

- `200` Request OK
- `201` New resource created
- `304` The resource has not been changed
- `400` The request parameters are invalid
- `401` The provided api key is invalid
- `403` You do not possess the required rights to access this resource.
- `404` The resource could not be found / is unknown.
- `415` The data could not be processed or the accept header is invalid.
- `422` Could not save the entity
- `500` An unexpected condition was encountered
- `503` The server is not available (maintenance work).

3.4 HTTP-Headers

> **Attention:** You must provide the following headers in each request:

3.5 Messages

3.5.1 `POST` - /api/v1/add-message

Send a new message

```
POST /api/v1/add-message
Accept: application/json
Authorization: Key $ApiKey
```

Parameters

Name	Required	Description
sender_no	required	the phone number routing the SMS through
receiver	required	the phone number of the person receiving
message	required	the content of the message being sent

Sample Code

Sample Response

```
{"status":false,"message":""}
```

3.5.2 `GET` - /api/v1/users/{id}

Get invoice information

```
GET /api/v1/users/{id}
Accept: application/json
Authorization: Bearer $AccessToken
```

Sample Code

```php
<?php
$curl = curl_init();
curl_setopt_array($curl, array(
  CURLOPT_URL => "http://api.noregrets.ug/V1/users?
↪key=8g80kg4swkk00wwsggg4w48c408sk08048w0s84o",
  CURLOPT_RETURNTRANSFER => true,
  CURLOPT_ENCODING => "",
  CURLOPT_MAXREDIRS => 10,
  CURLOPT_TIMEOUT => 30,
  CURLOPT_HTTP_VERSION => CURL_HTTP_VERSION_1_1,
  CURLOPT_CUSTOMREQUEST => "GET",
  CURLOPT_SSL_VERIFYHOST => 0,
  CURLOPT_SSL_VERIFYPEER => 0,
));

$response = curl_exec($curl);
$err = curl_error($curl);

curl_close($curl);

if ($err) {
  echo "cURL Error #:" . $err;
} else {
  echo $response;
}
 ?>
```

Sample Response

```
[
{
  "m_number": "UN47102220",
  "lastname": "Stephen Barungi",
  "firstname": "",
  "other_names": "",
  "gender": "N/A",
```

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```
  "contacts": [
    {
      "contact": "barungisteven@gmail.com"
    },
    {
      "contact": "+256755168219"
    }
  ]
},
{
  "m_number": "DV1088633736",
  "lastname": "steve",
  "firstname": "baros",
  "other_names": "",
  "gender": "",
  "contacts": [
    {
      "contact": "sbarungi@cis.mak.ac.ug"
    }
  ]
}
```

]

3.5.3 `PUT` - /api/v1/users/{id}

Update an invoice

```
PUT /api/v1/users/{id}
Accept: application/json
Authorization: ApiKey $AccessToken
```

Parameters

Name	Required	Description
id	required	Invoice ID
reference_no	optional	Invoice reference code
title	optional	Invoice title
client_id	required	Invoice client ID

3.5.4 `DELETE` - /api/v1/invoices/{id}

Delete invoice

```
DELETE /api/v1/invoices/{id}
Accept: application/json
Authorization: Bearer $AccessToken
```

3.5.5 `GET` - /api/v1/invoices

Get a list of all invoices

```
GET /api/v1/invoices
Accept: application/json
Authorization: Key $AccessToken
```

3.5.6 `GET` - /api/v1/invoices/{id}/payments

Get al Groups

```
GET /api/v1/groups/{id}/
Accept: application/json
Authorization: Key $ApiKey
```

3.5.7 `GET` - /api/v1/invoices/{id}/comments

Show invoice comments

```
GET /api/v1/invoices/{id}/comments
Accept: application/json
Authorization: Key $AccessToken
```

3.5.8 `GET` - /api/v1/invoices/{id}/items

Show invoice product lines

```
GET /api/v1/invoices/{id}/items
Accept: application/json
Authorization: Key $AccessToken
```

3.6 Expenses

3.6.1 `POST` - /api/v1/groups

Create a new group

```
POST /api/v1/expenses
Accept: application/json
Authorization: Key $ApiKey
```

Parameters

Name	Required	Description or name of the group
amount	required	Expense amount e.g 1500.00

3.6.2 `GET` - /api/v1/groups/{id}

Get Group information

```
GET /api/v1/groups/{id}
Accept: application/json
Authorization: Key $ApiKey
```

Sample Response

```
{
  "status": "true",
    "message": "succees",
  "data": {
    "group_id": 10,
    "code": "EXP-AC0010",
    "group_name": "Schools",
    "created_at": "2018-12-24T05:30:44+03:00",
    "updated_at": "2018-12-24T05:30:44+03:00"
  }
}
```

3.7 Clients

3.7.1 `POST` - /api/v1/clients

Create a new client

```
POST /api/v1/clients
Accept: application/json
Authorization: Bearer $AccessToken
```

Parameters

Name	Required	Description
name	required	Client Name
email	required	Client email address
contact_email	required	Contact email address
phone	optional	Client phone number
address1	optional	Address
zip_code	optional	Zip Code
city	optional	City
state	optional	State
locale	optional	Preferred locale
country	optional	Country
tax_number	optional	Client tax number if any
currency	optional	Preferred currency
website	required	Client website URL
facebook	required	Client facebook link
twitter	optional	Twitter account URL
skype	optional	Skype address
linkedin	optional	LinkedIn profile
notes	optional	Additional notes
tags[]	optional	Array list of tags e.g `tags[design]`

3.7.2 `GET` - /api/v1/clients/{id}

Get client information

```
GET /api/v1/clients/{id}
Accept: application/json
Authorization: Bearer $AccessToken
```

Sample Response

```
{
  "type": "clients",
  "id": "100",
  "attributes": {
      "id": 100,
      "name": "Greenholt-Harris",
      "code": "COM00100",
      "email": "mclaughlin.jason@example.net",
      "contact": {
          "id": 1,
          "email": "admin@example.com",
          "name": "William Mandai"
      },
      "address": {
          "address1": "402 Reynolds Trace\nNorth Lutherchester, SD 94456-5868",
          "address2": null,
          "city": "East Geo",
          "state": null,
```

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```
            "zipcode": null,
            "country": "Peru"
        },
        "website": "https://hartmann.com",
        "phone": null,
        "mobile": null,
        "tax_number": null,
        "currency": "USD",
        "expense": "0.00",
        "balance": "0.00",
        "paid": "0.00",
        "social": {
            "skype": null,
            "facebook": null,
            "twitter": null,
            "linkedin": null
        },
        "notes": "Neque veritatis pariatur ut voluptatum. Qui officia molestias
→distinctio dicta quibusdam. Amet et adipisci ad eveniet.",
        "logo": "/storage/logos/tux_droid_1.jpg",
        "unsubscribed_at": null,
        "created_at": "2018-12-24T05:30:17+03:00",
        "updated_at": "2018-12-24T05:30:17+03:00"
    }
}
```

3.7.3 `PUT` - /api/v1/clients/{id}

Update client information

```
PUT /api/v1/clients/{id}
Accept: application/json
Authorization: Bearer $AccessToken
```

Parameters

Tip: Same as the create new client API parameters

3.7.4 `DELETE` - /api/v1/clients/{id}

Delete a client

```
DELETE /api/v1/clients/{id}
Accept: application/json
Authorization: Bearer $AccessToken
```

3.7.5 `GET` - /api/v1/clients

Get a list of all clients

```
GET /api/v1/clients
Accept: application/json
Authorization: Bearer $AccessToken
```

3.7.6 `GET` - /api/v1/clients/{id}/contacts

Show client contacts

```
GET /api/v1/clients/{id}/contacts
Accept: application/json
Authorization: Bearer $AccessToken
```

3.7.7 `GET` - /api/v1/clients/{id}/projects

Show client projects

```
GET /api/v1/clients/{id}/projects
Accept: application/json
Authorization: Bearer $AccessToken
```

3.7.8 `GET` - /api/v1/clients/{id}/invoices

Show client invoices

```
GET /api/v1/clients/{id}/invoices
Accept: application/json
Authorization: Bearer $AccessToken
```

3.7.9 `GET` - /api/v1/clients/{id}/estimates

Show client estimates

```
GET /api/v1/clients/{id}/estimates
Accept: application/json
Authorization: Bearer $AccessToken
```

3.7.10 `GET` - /api/v1/clients/{id}/payments

Show client payments

```
GET /api/v1/clients/{id}/payments
Accept: application/json
Authorization: Bearer $AccessToken
```

3.7.11 `GET` - /api/v1/clients/{id}/subscriptions

Show client subscriptions

```
GET /api/v1/clients/{id}/subscriptions
Accept: application/json
Authorization: Bearer $AccessToken
```

3.7.12 `GET` - /api/v1/clients/{id}/expenses

Show client expenses

```
GET /api/v1/clients/{id}/expenses
Accept: application/json
Authorization: Bearer $AccessToken
```

3.7.13 `GET` - /api/v1/clients/{id}/deals

Show organization deals

```
GET /api/v1/clients/{id}/deals
Accept: application/json
Authorization: Bearer $AccessToken
```

3.8 Contacts

3.8.1 `POST` - /api/v1/contacts

Create a new contact

```
POST /api/v1/contacts
Accept: application/json
Authorization: Key $ApiKey
```

Parameters

Name	Required	Description
name	required	Contact Name
email	required	Contact email address
phone	optional	Contact Phone Number

3.8.2 `GET` - /api/v1/contacts/{id}

Get contact information

```
GET /api/v1/contacts/{id}
Accept: application/json
Authorization: Bearer $AccessToken
```

Sample Response

```
{
  "type": "contacts",
  "id": "10",
  "attributes": {
      "id": 10,
      "name": "Johnathan Yundt I",
      "job_title": "Floral Designer",
      "email": "mackenzie46@example.org",
      "avatar": "/storage/avatars/avatar9.png",
      "city": null,
      "country": null,
      "website": null,
      "hourly_rate": "17.00",
      "business": {
          "id": 6,
          "name": "Turcotte, Buckridge and Herman",
          "contact_person": "luna66@example.net",
          "currency": "USD",
          "balance": "0.00",
          "expense": "0.00",
          "paid": "0.00"
      },
      "created_at": "2018-12-24T05:30:09+03:00",
      "updated_at": "2018-12-24T05:30:16+03:00"
  }
}
```

3.8.3 `PUT` - /api/v1/contacts/{id}

Update contact information

```
PUT /api/v1/contacts/{id}
Accept: application/json
Authorization: Bearer $AccessToken
```

Parameters

Tip: Same as the create contact API parameters

3.8.4 `DELETE` - /api/v1/contacts/{id}

Delete a contact

```
DELETE /api/v1/contacts/{id}
Accept: application/json
Authorization: Bearer $AccessToken
```

3.8.5 `GET` - /api/v1/contacts

Get a list of all contacts

```
GET /api/v1/contacts
Accept: application/json
Authorization: Bearer $AccessToken
```

Introduction

Workice CRM is a place for you to store information on the people and clients you interact with and track your outreach efforts. The CRM includes sales and marketing dashboards, invoicing dashboard, expenses dashboard, payments dashboard, projects and ticketing dashboards.

To purchase Workice CRM visit Envato Market

4.1 Top Navigation

In your Workice account, click your login name next to your avatar in the top navigation bar. The following sections will appear in the dropdown menu:

- Settings - Your Profile settings including GDPR.

- Tell a friend - Like Workice CRM? Share it with a friend.

- Reminders - Shows a list of all your reminders.

- Notifications - A list of all your notifications.

- Canned Responses - Instead of repeatedly copying and pasting the same email response you can save time by using canned responses.

- Need Help? - Have an issue? Open a ticket with us directly within your Workice CRM.

4.2 Invoicing Dashboard

This is the first page you'll see when you login. It provides a general overview of the invoicing status of your freelance business. The page displays the invoice-specific data that's associated with your business. It also allows you to see the updates at a glance.

The dashboard is designed to offer a simple yet powerful overview of your total business accounts:

- **Outstanding**: The total amount of all unpaid invoices.

- **Invoiced**: The total amount invoiced so far.
- **This Month**: Total amount invoiced in the current month.
- **Last Month**: Total amount of invoices created last month.

Tip: If you are being paid in a range of currencies, the dashboard will display the totals in your Base Currency.

Chart Below the stats boxes, you'll see a chart presenting your invoicing data in an easy-to-understand graphical format. The data presented in the chart are total invoiced amount versus revenue collected in the current Year.

4.3 Sales Dashboard

Sales dashboard provides a general overview of deals and leads.

The dashboard provides the information below:

- **Won Deals**: Total amount of won deals.
- **Lost Deals**: The total amount of lost deals.
- **This Month**: Total amount of deals this month.
- **Forecasted**: Get an idea of the revenue projection for your company.

Tip: If you are being paid in a range of currencies, the dashboard will display the totals in your Base Currency.

Chart Below the stats boxes, you'll see a chart presenting your sales data in an easy-to-understand graphical format. The data presented in the chart are total won deals versus lost deals in the current Year.

4.4 Expenses Dashboard

Expenses dashboard provides a general overview of your expenses.

The dashboard provides the information below:

- **Billed**: Total amount of billed expenses.
- **Unbillable**: Total amount of unbillable expenses.
- **This Month**: Total amount of expenses this month.
- **Last Month**: Total amount of expenses last month.

Tip: If you are being paid in a range of currencies, the dashboard will display the totals in your Base Currency.

Chart Below the stats boxes, you'll see a chart presenting your expenses data in an easy-to-understand graphical format. The data presented in the chart are total amount of expenses billable versus total amount billed in the current Year.

4.5 Payments Dashboard

Payment dashboard provides a general overview of your payments status of your freelance business.

The dashboard provides the information below:

- **Receipts**: Total amount received so far.
- **Credits**: Total amount of creditnotes issued.
- **This Month**: Total amount of payments received this month.
- **Last Month**: Total amount of payments received last month.

Tip: If you are being paid in a range of currencies, the dashboard will display the totals in your Base Currency.

Chart Below the stats boxes, you'll see a chart presenting your payments data in an easy-to-understand graphical format. The data presented in the chart are total amount of payments received versus total amount creditnotes issued in the current Year.

4.6 Projects Dashboard

Project dashboard provides a general overview of your project status of your freelance business.

The dashboard provides the information below:

- **Active**: Total number of active projects.
- **Done**: Total number of completed projects.
- **Pending Tasks**: Total number of pending tasks.
- **Done Tasks**: Total number of completed tasks.

Chart Below the stats boxes, you'll see a chart presenting your projects data in an easy-to-understand graphical format. The data presented in the chart are total number of projects, tasks and issues in the current Year.

4.7 Ticketing Dashboard

Ticketing dashboard provides a general overview of your support status for your freelance business.

The dashboard provides the information below:

- **Open**: Total number of open tickets.
- **Closed**: Total number of closed tickets.
- **Tickets**: Total number tickets.
- **Response Time**: Average amount of time used to solve a ticket

Chart Below the stats boxes, you'll see a chart presenting your tickets data in an easy-to-understand graphical format. The data presented in the chart are total number of tickets versus the number of ticket replies in the current Year.

4.8 Right Sidebar: Activities

The Activity list is incredibly useful as it presents an up-to-date, action-packed summary of what is happening across your entire CRM. Every action taken, whether by you or by one of your clients, is listed in chronological order, together with the date the action occurred.

CHAPTER 5

Social Logins

In addition to typical, form based authentication, Workice CRM also provides a simple, convenient way to authenticate with OAuth providers.

Tip: Workice CRM currently supports authentication with **Facebook, Twitter, LinkedIn, Google, GitHub and GitLab**

Attention: Before using Social Logins, you will have to enable it in **Settings > System Settings**. Activate the **Social Login** checkbox.

Note: New user accounts will be created if they do not exist.

5.1 Facebook Configuration

- Start by creating a Facebook Application on the Developers Console.

- Copy your newly created application **App ID** and **App Secret**

- Open your .env file located in your Root folder and set `FACEBOOK_CLIENT_ID={YOUR-APP-ID}` and `FACEBOOK_CLIENT_SECRET={YOUR-APP-SECRET}`.

- Still in your facebook developer console, under **Valid OAuth Redirect URIs** enter your redirect url as `https://your-domain.com/callback/facebook`. Example; If you have installed workice in https://example.com then the callback url will be `https://example.com/callback/facebook`.

- Now your users can login using Facebook.

5.2 Twitter Configuration

- Start by creating a Twitter Application on the Developers Console.

- Copy your newly created application Consumer API Keys **API key** and **API secret key**

- Open your .env file located in your Root folder and set `TWITTER_CLIENT_ID={YOUR-API-KEY}` and `TWITTER_CLIENT_SECRET={YOUR-API-SECRET}`.

- Still in your twitter developer console, under **Callback URLs** enter your redirect url as `https://your-domain.com/callback/twitter`. Example; If you have installed workice in https://example.com then the callback url will be `https://example.com/callback/twitter`.

5.3 Google Configuration

- Start by creating Google Application on the Developers Console.

- Copy your newly created application **Client ID** and **Client Secret**

- Open your .env file located in your Root folder and set `GOOGLE_CLIENT_ID={YOUR-CLIENT-ID}` and `GOOGLE_CLIENT_SECRET={YOUR-SECRET-KEY}`.

- Still in your google developer console, under **Authorized redirect URIs** enter your redirect url as `https://your-domain.com/callback/google`. Example; If you have installed workice in https://example.com then the callback url will be `https://example.com/callback/google`.

5.4 Github Configuration

- Start by creating Github Application on the Developers Console.

- Copy your newly created application **Client ID** and **Client Secret**

- Open your .env file located in your Root folder and set `GITHUB_CLIENT_ID={YOUR-CLIENT-ID}` and `GITHUB_CLIENT_SECRET={YOUR-SECRET-KEY}`.

- Still in your github developer console, under **Authorization callback URL** enter your redirect url as `https://your-domain.com/callback/github`. Example; If you have installed workice in https://example.com then the callback url will be `https://example.com/callback/github`.

5.5 LinkedIn Configuration

- Start by creating LinkedIn Application on the Developers Console.

- Copy your newly created application **Client ID** and **Client Secret**

- Open your .env file located in your Root folder and set `LINKEDIN_CLIENT_ID={YOUR-CLIENT-ID}` and `LINKEDIN_CLIENT_SECRET={YOUR-SECRET-KEY}`.

- Still in your linkedin developer console, under **Redirect URLs** enter your redirect url as `https://your-domain.com/callback/linkedin`. Example; If you have installed workice in https://example.com then the callback url will be `https://example.com/callback/linkedin`.

5.6 Gitlab Configuration

- Start by creating Gitlab Application in Applications Settings.

- Enter your **Redirect URI**. Example; If you have installed workice in https://example.com then the callback url will be `https://example.com/callback/gitlab`. (Use 1 line per URI)

- Under **Scopes** check the **API** checkbox to enable it

- Copy your newly created application **Application ID** and **Secret**

- Open your .env file located in your Root folder and set `GITLAB_CLIENT_ID={YOUR-APPLICATION-ID}` and `GITLAB_CLIENT_SECRET={YOUR-SECRET-KEY}`.

Accounts

Your clients are the core of your freelance business. Accounts/Clients in WorkiceCRM will typically hold all information specific to a company that your organisation will have a relationship with. In real world terms an Account may be a business entity that is a qualified Sales Prospect, Customer, Supplier or Re-seller and can be used to track all interactions that take place between these entities and your organisation. The relationship between the account and contact records is one-to-many, such that there can be many contacts associated with a single account.

6.1 Contacts

In Workice, a Contact is an individual who is typically associated with an Account (organisation) or Opportunity (qualified prospect). For example if Apple is the Account, then John Smith, Sales Manager of Apple is the Contact. This module holds all information relating to these individuals and also provides a vantage point for any history relating to a Contact record, for example if they sent you an Email.

6.2 List Accounts

The Accounts page is a list page that presents a summary of all your clients in a user-friendly table. Think of Accounts page as the "central station" of your client activity. Most of your day-to-day invoicing actions can be taken from the various links and buttons that appear on the Accounts page. And you can use the Accounts page as your starting point to explore more in-depth client information, view client projects, view client estimates, and more. Now, we'll take a closer look at the setup of the Clients page, and the range of actions available to you on the Accounts page.

To view your client list page, go to the main sidebar and click the Accounts tab.

6.2.1 Overview

The Clients page presents a list summary of all your current clients in a table format. The main elements of the table include:

- **Name:** The name of the client

- **Contact Person:** The name of the primary contact person

- **Email:** The client email address

- **Balance:** The client's payment balance

- **Expenses:** The client's unbilled expenses

6.3 Create Account

So, you've taken on a new client? Congratulations!

Your Clients list is at the heart of your invoicing activity, so it's really important to maintain current information on all your clients. When you start working with a new client, the first thing you'll need to do is to add the new client by entering their contact information and business details.

When creating and saving a new client to your Accounts list, make sure to have the relevant, up-to-date information at hand. You are only required to enter the information one time. WorkiceCRM automatically tracks all invoicing,projects,estimates and payment activity for each client.

Account Creation

To create accounts individually.

In the Accounts module, click (Create button) to add a new account.
In the Create Account page, enter the account details.
Click Save

Tip: The Create Account page is divided into four sections. Enter the information in the relevant fields.

Let's take a closer look at each section:

- **General**: Enter details about your client's business/company/organization, including the company name, email, contact person, tax number and tags (optional).

- **Contact**: Enter contact details related to your client including phone number, address, currency, preferred locale and a logo (optional).

- **Web**: Enter your client social media or website data.

- **Custom Fields**: If there are any custom fields for clients, it will be displayed here.

6.4 Account Overview Page

Once you have created an account, you can view the details of the account in the record's details page. The details page of an account presents information related to the account - for example, contacts, projects, invoices, deals, payments, expenses, subscriptions and so on - in a single location.

Tip: If you entered the client's street address, a Google map appears below the information box displaying the client's location.

6.4.1 Invoices Section

The Invoices section shows a list of all the client's invoices and accompanying information.

- **Invoice Reference**: The invoice number
- **Date Issued**: The date the invoice was created
- **Amount**: The invoice amount
- **Balance**: The invoice balance
- **Due Date**: The date the payment is due
- **Status**: The status of the invoice (Draft, Not Paid, Sent, Viewed, Paid, Overdue)

Tip: You can also create a new invoice for this client via the Create button that appears at the top left of the Invoices section.

6.4.2 Payments Section

The Payments section shows a list of all the client's payments and accompanying information.

- **Transaction reference**: The reference number of the transaction
- **Method**: The payment method (ie. Paypal, Stripe, Cash, etc)
- **Amount**: The payment amount
- **Date**: The date the payment was made
- **Currency**: Currency used in the payment

6.4.3 Projects Section

The projects section shows a list of all the client's projects and accompanying information.

- **Title**: The invoice number
- **Expenses**: Total expenses for the project
- **Start Date**: The start date of the project
- **Amount**: Total cost of the project
- **Progress**: Project progress in percentage
- **Due Date**: The date the project is due
- **Status**: The status of the project (Active, Done, On Hold)

6.4.4 Estimates Section

The estimates section shows a list of all the client's estimates and accompanying information.

- **Estimate Reference**: The estimate number
- **Date Issued**: The date the estimate was created
- **Amount**: The estimate amount

- **Viewed**: An icon showing whether an estimate has been viewed by client

- **Due Date**: The date the estimate is due

- **Status**: The status of the estimate (Draft, Pending, Sent, Approved, Rejected, Overdue)

Tip: You can also create a new estimate for this client via the Create button that appears at the top left of the estimates section.

6.4.5 Expenses Section

The expenses section shows a list of all the client's expenses and accompanying information.

- **Expense reference**: The reference number of the expense

- **Category**: Expense category (ie Housing, Marketing etc)

- **Amount**: The expense amount

- **Date**: The date the expense was incurred

- **Invoiced**: Whether the expense has been invoiced

- **Currency**: Currency used in the expense

6.4.6 Files Section

The Files section shows a list of all the client's associated files.

6.4.7 Subscriptions Section

The subscriptions section shows a list of all the client's subscriptions.

6.4.8 Updating Client

Click on the Update button, at the top right corner of the page. You will now be taken to the Account/Update page, where you can edit any of the fields.

6.4.9 Deleting the Client

You can also delete the specific client directly from their Client Overview page. Click on the trash icon at the right hand side of the Update Client button.

CHAPTER 7

Calendar

Workice CRM Calendar module allows users to easily schedule, view, and manage their activities like calls, meetings and appointments, all in one place. Easily keep track of all your customer invoices, payments, expenses, leads, tasks etc

7.1 Add Calendar Type

By default 2 calendar types are available, `Work and Personal`. You are free to add/update or delete calendar types by clicking on the **Gear** icon at the top right of the Calendar page.

7.2 iCal Feed URL

Click on iCal buton to see options for pulling events from your Workice Calendar and pushing them into other calendar apps. You will now see a popup with your iCal Feed URL. Follow the on-screen instructions to "subscribe" to events in your Workice Calendar with other apps. New events created in Workice CRM will then show up automatically in those other apps.

7.3 Google Calendar

To display events from your Google Calendar, Go to **Settings** -> **System Settings** and enter your Google Calendar API key and your Google Calendar ID. Once the settings are configured, your events will display on Workice calendar.

Reports

You can only manage what you can measure. With Workice CRM, manage the way your business is run with reporting that breaks down key metrics relating to your sales trends, invoices, projects, expenses and more. Reports are a great way to not only see how you're doing, but also forecast where you're going in the future.

> **Attention:** All the charts and statistics displayed in the reports section will use your base currency.

8.1 Invoices Report

Your Invoice Details Report gives you a comprehensive overview of all Invoices you have generated in a given time period. You can run an Invoice Report by doing the following:

- Click on the Reports tab
- Select Invoices module from the **Modules** dropdown menu.
- Click **Reports** button.

There are a few options you can change when generating reports;

- **Date Range** – You can set a date range you would like this report to include information within
- **Clients** – You can run Client(s) specific Invoice reports if necessary
- **Recurring** – Choose to only include recurring invoices
- **Status** – Choose to only include Invoices with specific statuses (such as Not Paid, Fully Paid, Cancelled etc)
- **Sent** – Only display sent invoices

8.2 Deals Report

These options are for simple and effective analysis of the bottom line: winning or losing deals.

These reports are excellent milestone reports, to demonstrate how many deals were closed in the account.

Note: If you have setup cron correctly, sales velocity and conversion rate will be calculated daily at 04:00.

8.2.1 Sales velocity

- Displays the average amount of time a deal's creation until the deal it marked as WON or LOST.
- Recommended for gaining insight into how effective your users or processes are in closing deals quickly.

8.2.2 Conversion Rate

- Displays how many deals are won compared to the total number of deals.
- Recommended for knowing if you lose many of your deals allowing you to make improvements to address any issues.

8.2.3 Deals won

- Displays the number of deals marked as WON in a particular month.
- Recommended for an easy at-hand report of how your business is bringing in income through its sales process.

8.2.4 Deals lost

- Displays the number of deals marked as LOST in a particular month.
- Recommended for an easy at-hand report of the deals that did not make it through, allowing you to do better in the future.

You can run Deals Report by doing the following:

- Click on the Reports tab
- Select Deals module from the **Modules** dropdown menu.
- Click **Reports** button.

There are a few options you can change when generating reports;

- **Date Range** – You can set a date range you would like this report to include information within
- **Pipeline** – You can run reports for a specific pipeline
- **Stage** – Choose to only include deals in specific stage
- **User** – Choose to only include deals assigned to a user
- **Status** – Only display deals in open, won or lost status

8.3 Leads Report

A CRM leads report shows you how many leads your sales team has acquired in a given time frame, as well as the lead source and stages. You can run leads report by doing the following:

- Click on the Reports tab
- Select Leads module from the **Modules** dropdown menu.
- Click **Reports** button.

There are a few options you can change when generating reports;

- **Date Range** – You can set a date range you would like this report to include information within
- **Stage** – Choose to only include leads in specific stage
- **Source** – You can run reports for a specific lead source e.g Google
- **Sales Agent** – Choose to only include leads assigned to a user
- **Archived** – Only display archived/unarchived leads

8.4 Expenses Report

The Expense Report breaks down all of your expenses into detail. You can run expenses report by doing the following:

- Click on the Reports tab
- Select Expenses module from the **Modules** dropdown menu.
- Click **Reports** button.

There are a few options you can change when generating reports;

- **Date Range** – You can set a date range you would like this report to include information within
- **Client** – Choose to show expenses for a specific client
- **Project** – You can run reports for a specific project
- **Billable** – Choose to only include billable expenses
- **Billed** – Only display billed/unbilled expenses
- **Category** – Only display expenses in a specific category

8.5 Payments Report

Your Payments Report breaks out all of the payments you have recorded in Workice. You can run payments report by doing the following:

- Click on the Reports tab
- Select Payments module from the **Modules** dropdown menu.
- Click **Reports** button.

There are a few options you can change when generating reports;

- **Date Range** – You can set a date range you would like this report to include information within

- **Project** – You can run reports for a specific project
- **Client** – Choose to show expenses for a specific client
- **Invoice** – Choose to only include payments for an invoice
- **Payment Method** – Only display payments received in a specific payment provider

8.6 Estimates Report

The estimates report shows you how many estimates have been sent, approved or rejected in a given time frame. You can run estimates report by doing the following:

- Click on the Reports tab
- Select Estimates module from the **Modules** dropdown menu.
- Click **Reports** button.

There are a few options you can change when generating reports;

- **Date Range** – You can set a date range you would like this report to include information within
- **Client** – Choose to show estimates for a specific client
- **Status** – Choose to show accepted, declined or pending estimates
- **Sent** – Include only those estimates that have been sent/not sent
- **Invoiced** – Choose to only include invoiced or uninvoiced estimates

8.7 Credits Report

The creditnotes report shows you how many credits have been closed or open in a given time frame. You can run creditnotes report by doing the following:

- Click on the Reports tab
- Select Creditnotes module from the **Modules** dropdown menu.
- Click **Reports** button.

There are a few options you can change when generating reports;

- **Date Range** – You can set a date range you would like this report to include information within
- **Client** – Choose to show credits for a specific client
- **Status** – Choose to show open or closed credits
- **Sent** – Include only those credits that have been sent or not sent

8.8 Projects Report

Within Workice Projects, you can generate a project report, designed to give you an overview of all projects within your CRM. You can run projects report by doing the following:

- Click on the Reports tab
- Select Projects module from the **Modules** dropdown menu.

- Click **Reports** button.

There are a few options you can change when generating reports;

- **Date Range** – You can set a date range you would like this report to include information within
- **Client** – Choose to show projects for a specific client
- **Status** – Choose to show active, done and on hold projects
- **With Contract** – Include only those projects which has a contract or does not have a contract

8.9 Tasks Report

The Tasks Report lists all tasks in your CRM, and allows you to filter by stage, milestone and task project. You can run tasks report by doing the following:

- Click on the Reports tab
- Select Tasks module from the **Modules** dropdown menu.
- Click **Reports** button.

There are a few options you can change when generating reports;

- **Date Range** – You can set a date range you would like this report to include information within
- **Project** – Choose to show tasks for a specific project
- **Milestone** – Choose to show tasks linked to a specific milestone
- **Stage** – Include only those tasks in a particular stage
- **User** – Include only those tasks created by a particular user

8.10 Timesheet Reports

The Timesheet Report is a very helpful way for your business to review how much time is being spent on a given project and by whom. Time Reports show the hours and billable information for each project, task and team member.

You can run time report by doing the following:

- Click on the Reports tab
- Select Timesheets module from the **Modules** dropdown menu.
- Click **Reports** button.

There are a few options you can change when generating reports;

- **Date Range** – You can set a date range you would like this report to include information within
- **Project** – Choose to show time entries for a specific project
- **Task** – Choose to show time entries for a specific task
- **Billable** – Include only those time entries that are billable or unbillable
- **User** – Include only those time entries created by a particular user

8.11 Ticket Reports

The tickets report show the number of tickets created and solved by date.

You can run tickets report by doing the following:

- Click on the Reports tab
- Select Tickets module from the **Modules** dropdown menu.
- Click **Reports** button.

There are a few options you can change when generating reports;

- **Date Range** – You can set a date range you would like this report to include information within
- **Reporter** – Choose to show only those ticket opened by a specific user
- **Status** – Choose to show tickets in specified status e.g open, closed etc
- **Department** – Choose to show tickets for a specific department
- **Priority** – Choose to show tickets that have low,high or medium priority

8.11.1 Agent Performance

You can view agent performance by clicking on **Type** button in the **Ticket Reports** page.

The agent performance table contains the columns below;

- **Name**: Ticket agent name
- **Comments**: The number of ticket comments posted by the agent
- **Resolved**: The number of tickets solved by the agent
- **Feedback**: The percentage number of happy customer feedbacks

8.11.2 Ticket Feedbacks

You can view ticket ratings by clicking on **Type** button in the **Ticket Reports** page.

The ticket feedback table contains the columns below;

- **Name**: Ticket requester name
- **Ticket**: The ticket that the ticket requester rated
- **Date**: Date when the rating was received
- **Rating**: Whether the client was happy/dissatisfied

Knowledgebase

Internet businesses are, in a sense, always open. Customers interact with your website 24/7, and when they have a question, they want an answer that minute.

The best knowledge software anticipates your users' most common problems and makes it quick and easy for them to find the solution they need. That's why a knowledge base is also useful for customer service agents. While working on a user's ticket, an agent can interact with your intuitive knowledge base content to learn more about their problem.

9.1 Create Categories

To create article categories, click on **gears** icon at the top right of the articles list page. A modal will pop up and you can create, edit or delete article categories.

9.2 Create Article

- Click on **Create** button
- Add article **subject** and select a **category**
- Write the body of your article.
- To disable comments on the article, uncheck **Allow Comments** checkbox
- To save the article as draft/unpublished, uncheck the **Published** checkbox

> **Attention:** The editor supports markdown text do not use html tags.

System Settings

You can view and edit the system configuration in your CRM by going to **Settings** and clicking on the **System Settings**.
You can modify the settings below;

- **Purchase Code**: Enter your purchase code (Used for license verification)
- **Default Language**: The default system language
- **Locale**: Your preferred system locale
- **Timezone**: Your timezone
- **Default Currency**: Your preferred currency. Default USD
- **Currency Symbol**: Must be the symbol of your default currency above
- **Default Calendar**: System default calendar type e.g Work or Personal
- **Tax 1**: Default Tax 1 percentage
- **Default Subscription**: Enter your default subscription name
- **Tax 1 Label**: Give your Tax 1 a name e.g GST
- **Tax 2**: Enter the default Tax 2 percentage
- **Tax 2 Label**: Give your Tax 2 a name
- **Tax Decimals**: The number of decimals to be used in tax display
- **Quantity Decimals**: Number of decimals to be used in displaying quantity
- **Date Format**: Choose your preferred date format
- **File max size**: Maximum file size in KB e.g 8192 for 8MB
- **Allowed files**: Comma separated list of allowed files e.g png,pdf,docx etc
- **Privacy Policy URL**: A link to your privacy policy
- **Slack webhook URL**: Your company slack webhook url to receive notifications
- **Open Exchange API Key**: If left blank, the system will use our rates server to fetch currency rates.

- **Google Calendar API Key**: Your Google Calendar API Key
- **Google Calendar ID**: Your Google Calendar ID. It will look something like "abcd1234@group.calendar.google.com".
- **Default Role**: When a user is created or registered, this role will be assigned.

> **Attention:** Do NOT set the **Default Role** to admin.

Other Options

- **Auto Reminder**: Send email reminders for estimates, contracts, tasks or todos when almost overdue.
- **Enable Languages**: When enabled, you can select your preferred language using the dropdown languages menu.
- **Use Gravatar**: Use gravatar to retrieve user avatars
- **Allow Client Registration**: Enable client registrations
- **Show amount in words**: Show amount in words (Invoices, Credits, Estimates and Payments)
- **Daily Digest**: Enable this option to receive daily email digest
- **Exchange Rates**: Enable exchange rate updates
- **Use ReCaptcha**: Use ReCaptcha in registrations
- **Clients add projects**: Clients can add projects
- **Stop timer logout**: When this option is enabled, running timers will be stopped when you logout.
- **Contract to Project**: Automatically convert a contract into a project once it's signed
- **Update Notifications**: Receive update notifications
- **Demo Mode**: Turn application into demo mode useful for those who purchased extended license and want to show a demo.