

USER MANUAL GUIDELINE



Category: Sales

Category: Invoices

Merging Invoices

Merging invoices is feature in KujiVerse CRM that allows you to merge/include already created invoices into 1 invoice by passing all the invoice info to new invoice. This feature is used if your customer have other unpaid invoices but you need to create another invoice for the customer and you want to prevent your customer to pay multiple invoices, in this case your customer will only need to pay 1 invoice.

How to check if there is available invoices to be merged?

Available invoices to merge are showing in different places.

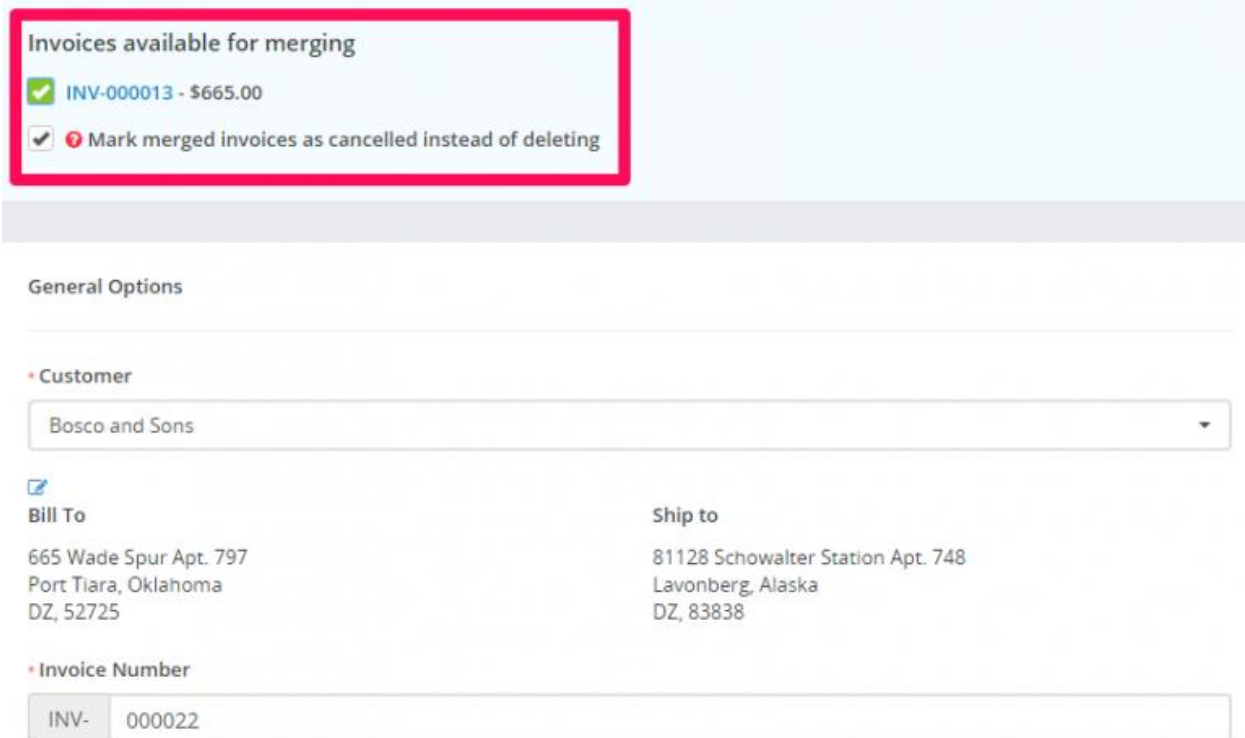
1. When create new invoice – Available invoices to merge are shown after selecting customer, the system will check if there is available invoices to be merged into the invoice you are creating for the selected customer.
2. When you preview existing invoice from admin area – Available invoices will be shown on top and you can click on the edit button to apply the necessary action.
3. When you edit existing invoice – Available invoices for merging are shown immediately after entering the edit invoice area.

You can merge invoices only that belongs to the following statuses: Unpaid, Overdue, Draft.

Eq. If the invoice you edit is with status Partially Paid you wont be able to merge existing invoices in this invoice with status Partially Paid.

How to merge the invoices?

When you create/edit invoice on the top a message will be shown if there is invoices available for merging.



The screenshot shows a software interface for creating or editing an invoice. At the top, a light blue notification box titled "Invoices available for merging" is highlighted with a red border. It contains a green checkmark icon, the text "INV-000013 - \$665.00", and a checkbox with a red circle icon and the text "Mark merged invoices as cancelled instead of deleting". Below this, the "General Options" section is visible. It includes a "Customer" dropdown menu set to "Bosco and Sons". There are two columns for address information: "Bill To" (665 Wade Spur Apt. 797, Port Tiara, Oklahoma, DZ, 52725) and "Ship to" (81128 Schowalter Station Apt. 748, Lavonberg, Alaska, DZ, 83838). At the bottom, the "Invoice Number" field is set to "INV- 000022".

You can merge multiple invoices by clicking on the checkbox on the left side from the invoice number.

After the field is checked the **invoice items will be auto added in your existing invoice** that you are currently creating or edit.

Additionally you can mark the merged invoices as canceled instead of deleting because merging invoices will create gaps in invoice numbers. Please do not merge invoices if you want no gaps in your invoice history. You also have the option of manually adjusting invoice numbers if you want to fill the gaps.

Cancelled invoices are excluded from the reports and overdue reminders are disable

Invoice Overdue Notices

You can send invoice overdue notice manually or automatically with cron job.

Sending with cron job

To setup automatically overdue notice go to **Setup -> Settings -> Cron Job -> Invoices**

If you want to send overdue notice the same day when the invoice is overdue set the field **Automatically send reminder after** to 0, otherwise set it according to your needs.


The second field is about resending the overdue notice based on the last notice date. **If you want to disable resending the overdue notice** set this field to 0




The overdue notices will be sent at specific hour based **Hour of day to perform automatic operations** value that is set in **Setup->Settings->Cron Job->Invoices**

Record Invoice Payment

While viewing the invoice from the admin area click on the **+ Payment** button to record a new invoice payment, after you click on the button new view will be shown including the record payment form.

[Invoice](#)
[Tasks](#)
[Activity Log](#)
[Reminders](#)
[Notes](#)




UNPAID



MORE ▾
+ PAYMENT

INV-000008

Perfex INC
 172 Ivy Club Gottliebfort
 New Heaven
 Canada [CA] 2364

Bill To:
Labadie-Jaskolski
 363 Darius Station Suite 278
 Bernhardport Wyoming
 WF 89773
 VAT Number: AT U17634286

Ship to:
 6644 Rippin Square Suite 991
 North Narcisofort Colorado
 WF 26238-4187

Invoice Date: 2020-08-12
Due Date: 2020-09-11
Sale Agent: Vince Moore

#	Item	Qty	Rate	Tax	Amount
1	Web Design Enim nihil sed ea fugit odio minus qui necessitatibus. Quia rerum in voluptatem dolor.	2	1,200.00	TAX1 18.00% TAX2 10.00%	2,400.00
2	MacBook Pro Qui rerum recusandae et iusto corporis. Sequi aut ea qui totam.	1	2,150.00	TAX1 18.00% TAX2 10.00%	2,150.00

Keep in mind that the **+ Payment** button will be shown only if the user has permissions for payments CREATE, also **this button may be disabled in the invoice is with status Paid or Canceled.**

Record Payment for INV-000011

*** Amount Received**

*** Payment Date**

*** Payment Mode**

Do not send invoice payment recorded email to customer contacts

Leave a note

Admin Note

CANCEL
SAVE

- Amount Received** – The total amount that is paid for this invoice, this field will be auto-populated based on the invoice due amount.

2. **Payment Date** – Select date for the payment, by default current date will be selected.
3. **Payment Mode** – You need to select one of the available payment modes for this invoice. Is payment mode not shown on the list? Click [here](#) to read more.
4. Additionally you can add **payment note**.
5. **Do not send invoice payment recorded email to customer contacts** – If checked no email will be sent to customer contacts that payment is recorded for this invoice. In case you want to disable this option you can disable the email template in Setup->Settings->Invoice Payment Recorded (Sent to customer contacts), after the template is disabled this field won't be shown and no email will be sent to the customer.
6. Click Save

After the payment is recorded the invoice status will be automatically updated based on the total amount. If the full amount is recorded for this invoice, the status will be updated to **Paid** otherwise will be updated to **Partially Paid**.

Email sent to customer contacts

If “**Do not send invoice payment recorded email to customer contacts**” is unchecked after payment is recorded email (with PDF payment attachment) will be sent directly to the customer contacts to inform that payment is recorded for this invoice.

To edit the email content go to **Setup -> Email Templates -> Invoice Payment Recorded (Sent to customer contacts)**.

Email sent to staff

Additionally, the system will send another email (**Invoice Payment Recorded (Sent to staff)**) to invoice **sale agent** and **invoice creator**, this email will be sent too when the customer pays the invoice online via an online payment gateway.

Keep in mind if the payment is recorded via the admin area from staff member this (currently logged in) staff member won't receive an email.

Send Invoice to Email

KujiVerse have the option to send this invoice to a customer which is related. Also, the PDF invoice will be attached to the email. If you want to do not attach the PDF invoice simple uncheck the checkbox **Attach Invoice PDF**

Send invoice to client



Email to

madelynn03@example.org

CC

Attach Invoice PDF

Preview Email Template

File Edit Insert View Format Table Tools

Font Family Font Sizes **B** *I* [List icons]

[Text icons] [Link icon] [List icons] [Code icon]

Dear {contact_firstname} {contact_lastname}

We have prepared the following invoice for you: # {invoice_number}

Invoice status: **{invoice_status}**

You can view the invoice on the following link: [{invoice_number}](#)

Please contact us for more information.

Kind regards,

{email_signature}

div

Words: 34

CLOSE

SEND

After sending the invoice to the customer if you want to send again the invoice there will be another email content. Because the initial invoice is already sent. Now the customer maybe want the invoice again and in all cases this content will be different. Go to **Setup-> Email Templates -> Invoice Already Send to Client** to edit the email content when sending the invoice to your customer for second time.

By default **all contacts with enabled email notifications for invoices will be selected** you can adjust to your needs.

When [cron job](#) will try to send the invoice eq. for expiration reminders **will be sent to all contacts with enabled email notifications for invoices.**

Recurring Invoice

Settings

Navigate to **Settings Menu -> Settings -> Cron Job**

Create a new invoice from the main recurring invoice only if the main invoice is with status paid?

If this field is set to No the recurring invoice is not with status paid the new invoice won't be created

Hour of day to perform automatic operations (24 hours format eq. 9 for 9am or 15 for 3pm.)

The invoice will be re-created at a specific time of the day, based on the hour you have configured in this option.

Example if the invoice should be re-created at 1st of May if you set here 09 the invoice will be re-created 1st of May 9 AM.

Action to take after invoice is re-created

- Generate and Autosend the renewed invoice to the customer – **NOTE:** The customer contacts must configured **email notification for invoices** in order to receive the email.
- Generate a Unpaid Invoice

- Generate a Draft Invoice

Create recurring invoice

When you add/edit invoice you have an option to set this invoice to be recurring.

That means that the invoice will be re-created automatically based on your setup for recurring invoice (every X months). You can set recurring starting from 1 month to 12 months or select custom to fit your needs.

How are the recurring days calculated?

The date when the invoice needs to be re-created(renewed) is calculated from the **invoice date**.

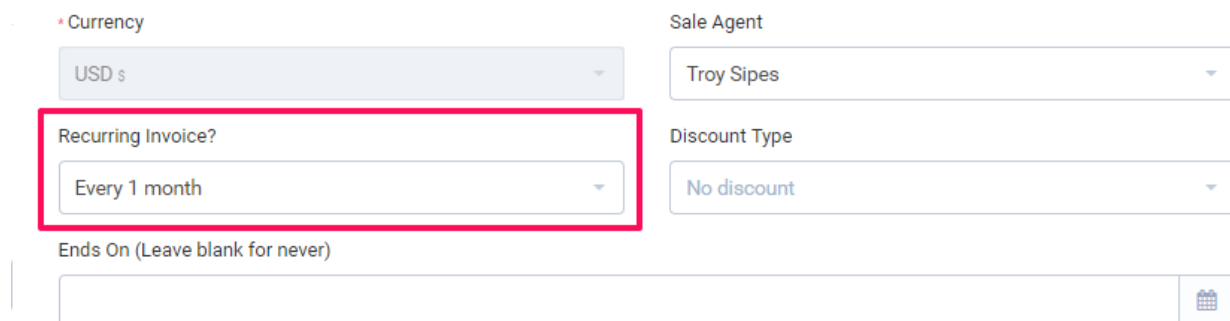
The dates in the examples are shown in Y-m-d format.

Example 1:

- Invoice date is XXXX-08-17
- Recurring is **every 1 month**
- The invoice will be re-created (renewed) on XXXX-09-17

Example 2:

- Invoice date is XXXX-03-01
- Recurring is **every month**
- The invoice will be re-created (renewed) on XXXX-04-01



The screenshot shows a form with several fields. A red box highlights the 'Recurring Invoice?' dropdown menu, which is currently set to 'Every 1 month'. Other visible fields include 'Currency' (USD \$), 'Sale Agent' (Troy Sipes), 'Discount Type' (No discount), and 'Ends On (Leave blank for never)'.

When the invoices from this invoice will be generated you will have an overview which invoices are generated from this invoice at the **Child Invoices** tab.

Invoice **Child Invoices** Tasks Activity Log Reminders Notes

UNPAID

RECORD PAYMENT

Created invoices from this recurring invoice

INV-000015	\$1,337.90
2017-12-05	
Unpaid	

Stop a Recurring Invoice

In order to stop recurring invoice, you will need to go to the invoice edit area and set the **Recurring Invoice** drop-down field to NO.

NOTES:

- You need to have [setup cron job](#) for this feature.
- Recurring Draft invoices **won't be re-created**.
- Recurring invoices with status Canceled (canceled invoices) **will be** still re-created when the date for the next recurring invoice comes. In case you don't want the invoice to be re-created from canceled invoice you must edit the invoice and set Recurring to No.

Create Invoice

To create new invoice go to **Sales -> Invoices** and click on the button **Create new invoice**

The screenshot shows a software interface with a dark sidebar on the left containing navigation options: Welcome Lyric, DASHBOARD, CUSTOMERS, PROJECTS, SALES (with a dropdown arrow), EXPENSES, SUPPORT, and CONTRACTS. Under SALES, there are sub-options: Proposals, Estimates, Invoices (highlighted in a blue pill), Payments, and Items. The main content area has a 'CREATE NEW INVOICE' button in a blue pill, with a red arrow pointing to it. Below the button are three buttons: EXPORT, VISIBILITY, and RELOAD. A 'Show 25 entries' dropdown is present. A table of invoices is displayed with the following data:

Invoice #	Amount	Total Tax	Date
INV-000012	\$743.40	\$113.40	2017-01-05
INV-000011	\$350.00	\$0.00	2017-01-05
INV-000010	\$2,196.00	\$396.00	2017-01-05
INV-000009	\$1,286.20	\$196.20	2017-01-05
INV-000008	\$300.00	\$0.00	2017-01-05
INV-000007	\$1,500.00	\$0.00	2017-01-05
INV-000006	\$2,522.40	\$22.40	2017-01-05

Select **Customer**, when selecting a Client the **customer information will be fetched directly from the customer's profile**. Another option is that you can click on the edit icon and directly add the desired customer information, this also is applied for the billing information they are also fetched when selecting a customer.

The screenshot shows an invoice form with two main sections: General Options and Advanced Options.

General Options:

- Customer: Block and Sons
- Bill To: 2132 Zboncak Garden, Connville, West Virginia, LY, 60418
- Ship to: 6632 Wunsch Ranch Apt. 618, North Kennaland, Michigan, LY, 17230
- Invoice Number: INV- 000014
- Invoice Date: 2017-01-06
- Due Date: 2017-01-15

Advanced Options:

- Allowed payment modes for this invoice:
 - Bank
 - Paypal
 - Stripe
 - Prevent sending overdue reminders for this invoice
- Currency: USD
- Sale Agent: Nothing selected
- Recurring Invoice?: No
- Discount Type: No discount
- Admin Note: (Empty text area)

NOTE: If you want the billing details to be auto populated when selecting the customer you need previously to have added Billing details in the customer profile.

Billing and Shipping – If you change the billing and shipping information after selecting a client and click on the edit icon, this will be changed for the Invoice but in the customer profile the information will remain the same.

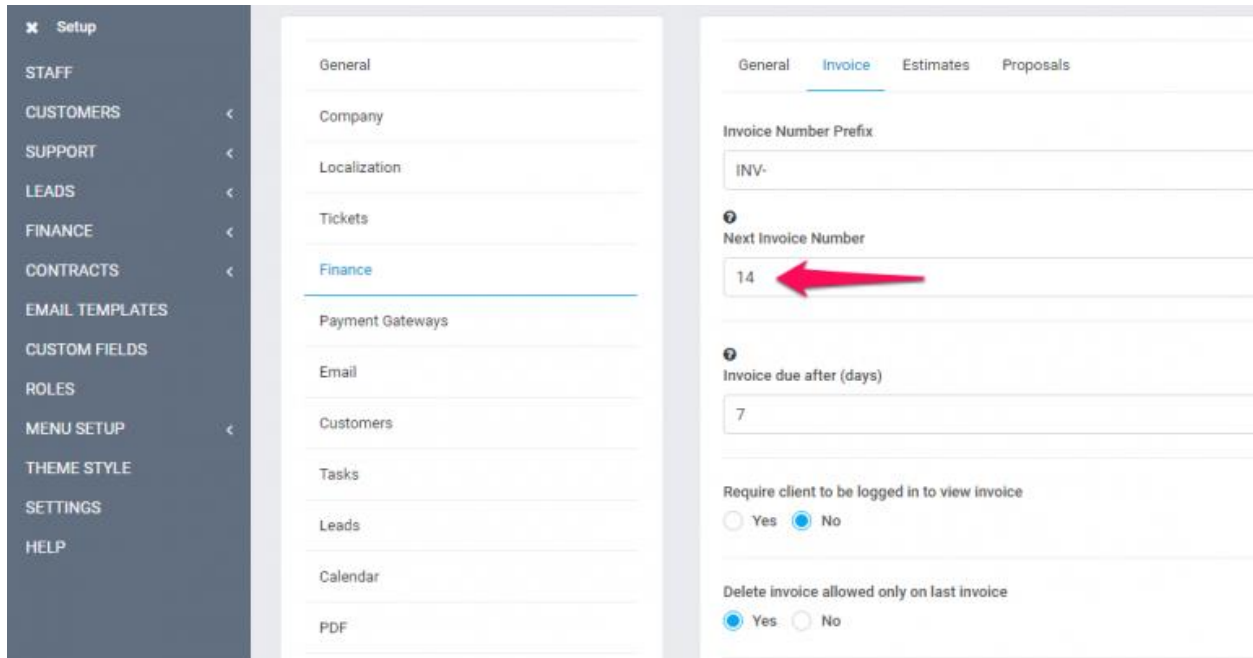
The screenshot displays the 'General Options' and 'Advanced Options' sections of an invoice creation form. In the 'General Options' section, the 'Customer' is 'Kulas-Grant', the 'Project' is 'Nothing selected', and the 'Bill To' address is '4018 Hermann Unions Apt. 680, Allisonburgh, Hawaii, RD, 54257-5022'. A red arrow points to the 'Bill To' icon. The 'Invoice Number' is 'INV: 000014', the 'Invoice Date' is '2017-01-08', and the 'Due Date' is '2017-01-15'. The 'Advanced Options' section includes 'Allowed payment modes for this invoice' with 'Bank', 'Paypal', and 'Stripe' checked, and 'Prevent sending overdue reminders for this invoice' unchecked. The 'Currency' is 'USD', the 'Sale Agent' is 'Nothing selected', the 'Recurring Invoice?' is 'No', and the 'Discount Type' is 'No discount'. There is also an 'Admin Note' field.

Allowed payment modes for this invoice – Select allowed payment modes for the invoice you are creating, if you customers pays online using KujiVerse CRM payment gateways they will be [visible in the invoice html](#) area and when [recording payment](#) for invoice from admin area.

Currency – The currency is automatically selected based on your default currency or currency set for the selected Customer you selected previously in the customer profile. If the currency for this customer is **USD** it will be automatically selected and cannot be changed, read more [here](#)

INVOICE Number – Number is automatically populated Eg. 00012 next will be 00013.

This number its fetched from **Setup->Settings->Finance->Invoice**– Next Number the number its auto increment but you can change the next number in **Setup->Settings->Finance->Invoice**.



Customer note is visible to client side also, on the HTML invoice and PDF invoice.

You can setup terms directly in the invoice or you can have predefined terms which will be auto populated. To setup predefined terms go to **Setup -> Settings -> Finance -> Invoice** scroll down and you can populate the fields as it fits you.

Recurring Invoice – Read more [here](#) about how to setup recurring invoice.

Sale Agent – You can select sale agent for this invoice then then generate reports in **Reports->Sales->Invoices Report**. Note that the sale agent full name will be shown on the invoice if in **Setup->Settings->Finance->Invoice-> Show sale agent on invoice** is set to yes, see picture.

Show Sale Agent on Invoice
 Yes No

Invoice Number Format
 Number Based (000001) Year Based (YYYY/000001)

Predefined Terms & Conditions
 Alias provident quam adipisci. Voluptatem quas explicabo expedita. Sit aut eum et repellat magnam sequi nihil. Voluptatum totam sit ut ut optio quam ut.

Predefined Client Note

You can add **Invoice items**, when adding make sure u click on the blue check icon in order the item to be added you can also select tax options see shown in picture.

Add Item **Bill To** **Projects tasks are not included in this list** **Show quantity as:** Qty Hours Qty/Hours

Item	Description	Qty	Rate	Tax	Amount
Web Design	Repellendus dolorem eos ut voluptatem. Architecte rerum dolor est et ut architecto.	1	1200.00	18.00%	1416.00
LCD TV	Enim voluptatem laudantium molestiae quas nam eum amet. Sint libero architecto dignissimos quidem expedita omnia. Eveniet est est itaque minus. Illum commodi cumque inventore.	1	250.00	10.00%	250.00
USB Stick	Ab autem rem nam laudantium ipsam animi iure. Et quam illum molestiae vitae sapiente nihil magni.	1	30.00	5.00%	30.00

Sub Total :	280.00
Discount (%)	0 -0.00
TAX3(5.00%)	1.50
TAX2(10.00%)	25.00
Adjustment	0.00 0.00
Total :	\$306.50

The items will be stored separately for each invoice and changing the items information in Sales->Items wont affect the already created invoices with specific item/s.

Admin note is only for admins/staff members.

Customer note is visible to client side also, on the HTML invoice and PDF invoice.

Click Save.

While editing/creating invoice the **adjustment option** is always available if you want to +- the total amount

Exporting Customers Invoices/Estimates/Payment to ZIP

Go to the customer profile and click on the tab you want to export data eg. invoices

Select status or just leave it All and click Submit. All invoices based on your selected options will be added to .zip file.

You can choose start and end date, **the date is based on invoice/estimate/payment date**

The screenshot shows a customer profile for 'Cummings, Funk and Beckridge'. The 'Invoices' tab is selected. The page displays two summary boxes: '\$2,858.20 Outstanding Invoices' and '\$0.00 Paid Due Invoices'. Below these are buttons for 'CREATE NEW INVOICE' and 'ZIP INVOICES', with a red arrow pointing to the 'ZIP INVOICES' button. There are also buttons for 'EXPORT', 'NOBILITY', and 'RELOAD'. A table shows one invoice entry with columns for Invoice #, Amount, Total Tax, Date, and Project.

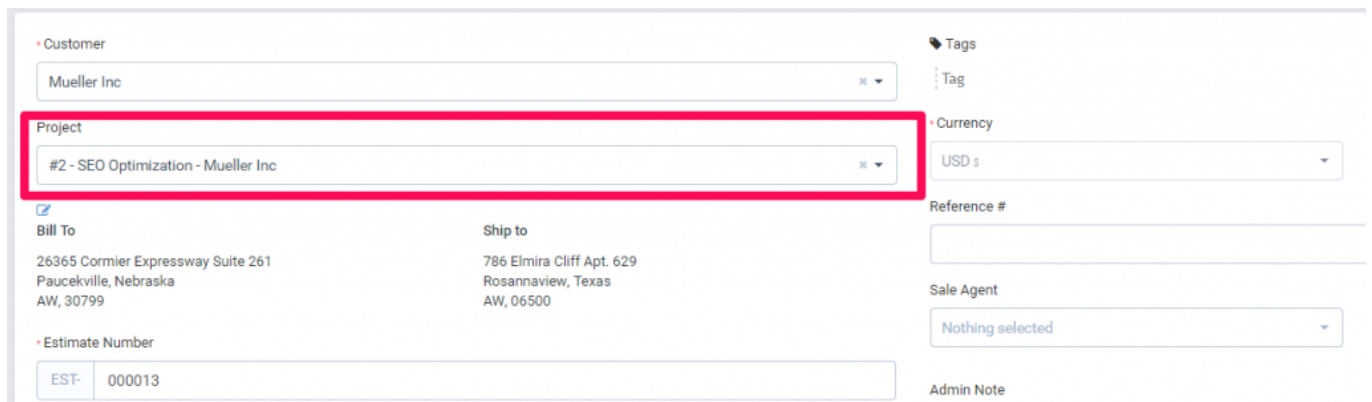
Invoice #	Amount	Total Tax	Date	Project
INV-000001	\$2,858.20	\$476.20	2016-12-08	

Showing 1 of 1 entries

Category: Estimates

Link Estimate To Project

1. Go to **Menu -> Sales -> Estimates** and click **Create New Estimate**
2. Select customer.
3. A drop-down with projects will be shown below the customers select field (**if no projects associated with the selected customer the dropdown with projects wont be shown**)
4. Select the project
5. Configure the estimate for your needs
6. **Save the estimate**
7. Navigate to the project area and click on the tab **Sales->Estimates** you will be able to see the newly created estimate associated with your selected project.



The screenshot shows a web form for creating an estimate. The 'Customer' field is set to 'Mueller Inc'. Below it, the 'Project' dropdown menu is highlighted with a red border and contains the selection '#2 - SEO Optimization - Mueller Inc'. Other fields include 'Tags', 'Currency' (set to 'USD'), 'Reference #', 'Sale Agent' (set to 'Nothing selected'), and 'Admin Note'. The 'Bill To' and 'Ship to' addresses are also visible. The 'Estimate Number' field shows 'EST- 000013'.

Send Estimate to Email

KujiVerse have option to send this estimate to customer which is related. Also the PDF estimate will be attached to the email. If you want to do not attach the PDF estimate simple uncheck the checkbox **Attach Estimate PDF**

Send estimate to client ✕

Email to
tremayne32@example.net

CC

Attach estimate PDF

Preview Email Template

File Edit Insert View Format Table Tools

Times New ... 11pt A **A** **B** *I*

Alignment

Dear {contact_firstname} {contact_lastname}

Please find the attached estimate # {estimate_number}

Estimate status: **{estimate_status}**

You can view the estimate on the following link: [{estimate_number}](#)

We look forward to your communication.

Kind regards,

{email_signature}

div Words: 31

CLOSE SEND

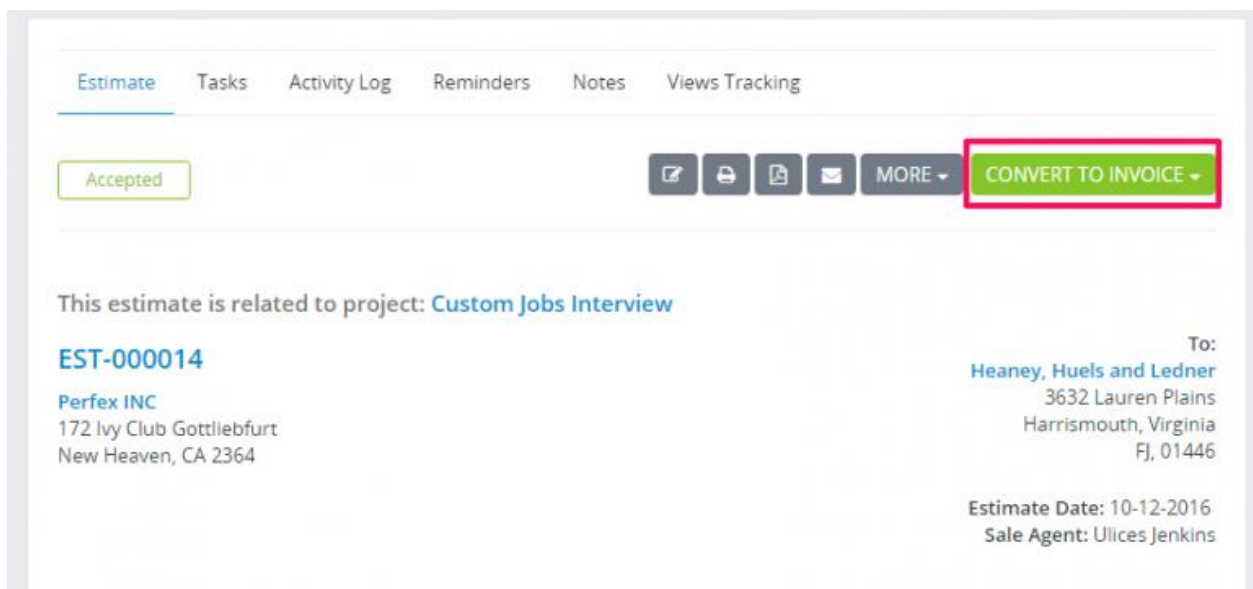
After sending the estimate to the customer if you want to send again the estimate there will be another email content. Because the initial estimate is already sent. Now the customer maybe want the estimate again and in all cases this content will be different. Go to **Setup-> Email Templates -> Estimate Already Send to Client** to edit the email content when sending the estimate to your customer for second time.

By default **all contacts with permission estimate will be selected** you can adjust to your needs.

Converting Estimate To Invoice

You can easily convert the estimate to invoice from the admin area.

Open the estimate you want to convert and on the right side click Convert to Invoice



The screenshot displays a software interface for managing estimates. At the top, there are navigation tabs: Estimate, Tasks, Activity Log, Reminders, Notes, and Views Tracking. Below the tabs, there is a status indicator 'Accepted' in a green box. To the right of the status indicator is a row of action icons: a pencil, a trash can, a document, an envelope, and a 'MORE' dropdown menu. The 'CONVERT TO INVOICE' button is highlighted with a red rectangular border. Below the icons, the text reads 'This estimate is related to project: [Custom Jobs Interview](#)'. The estimate details are as follows:

EST-000014 Perfex INC 172 Ivy Club Gottliebfurt New Heaven, CA 2364	To: Heaney, Huels and Ledner 3632 Lauren Plains Harrismouth, Virginia FJ, 01446
	Estimate Date: 10-12-2016 Sale Agent: Ulices Jenkins

Create Estimate

To create new estimate go to **Sales -> Estimates -> Create New Estimate** or by clicking on the **Build** icon on the top left side and click **Create Estimate**

The screenshot shows a software interface with a sidebar on the left and a main content area on the right. The sidebar contains a navigation menu with items: Welcome Lincoln, DASHBOARD, CUSTOMERS, PROJECTS, SALES (expanded), and EXPENSES/SUPPORT. Under 'SALES', 'Estimates' is highlighted with a blue circle and a red arrow points to it. The main content area has a header with 'CREATE NEW ESTIMATE' (highlighted with a red box) and 'SWITCH TO PIPELINE'. Below the header are buttons for 'EXPORT', 'VISIBILITY', and 'RELOAD', and a 'Show 25 entries' dropdown. The main area contains a table of estimates.

Estimate #	Amount	Total Tax	Customer	Project
EST-000013	\$0.00	\$0.00	Heaney, Huels and Ledner	ojoiho
EST-000012	\$115.20	\$25.20	Ritchie Ltd	
EST-000011	\$1,000.00	\$90.00	Ritchie Ltd	
EST-000010	\$500.00	\$0.00	Ritchie Ltd	
EST-000009	\$3,192.00	\$792.00	Schmitt Inc	
EST-000008	\$8,551.00	\$1,851.00	Heemann Ltd	

Client – Before selecting a client you must have added clients **Customers->New Customer**.

When selecting a Customer the **customer information will be fetched directly from the customer profile you created**. Another option is that you can click on the edit icon and directly add the desired customer information, this also is applied for the billing information they are also fetched when selecting a customer.

If you want the billing details to be auto populated when selecting the customer you need previously to have added Billing details in the customer profile.

Welcome Geovany

- DASHBOARD
- CUSTOMERS
- PROJECTS
- SALES
- EXPENSES
- SUPPORT
- CONTRACTS
- LEADS
- TASKS
- KNOWLEDGE BASE
- REPORTS

General Options

Customer: Cummerata LLC

Bill To
995 Schimmel Row
Kunzeburgh, Florida
AL, 89819-0498

Ship to
--
--
--

Estimate Number: EST- 000013

Reference #

Estimate Date: 2017-01-06

Expiry Date

Billing and Shipping – If you change the billing and shipping information after selecting a client and click on the edit icon, this will be changed for the Estimate but in the customer profile the information will remain the same and wont be any changes in the Invoice.

Welcome Geovany

- DASHBOARD
- CUSTOMERS
- PROJECTS
- SALES
- EXPENSES
- SUPPORT
- CONTRACTS
- LEADS
- TASKS
- KNOWLEDGE BASE
- REPORTS

General Options

Customer: Cummerata LLC

Bill To ←
995 Schimmel Row
Kunzeburgh, Florida
AL, 89819-0498

Ship to
--
--
--

Estimate Number: EST- 000013

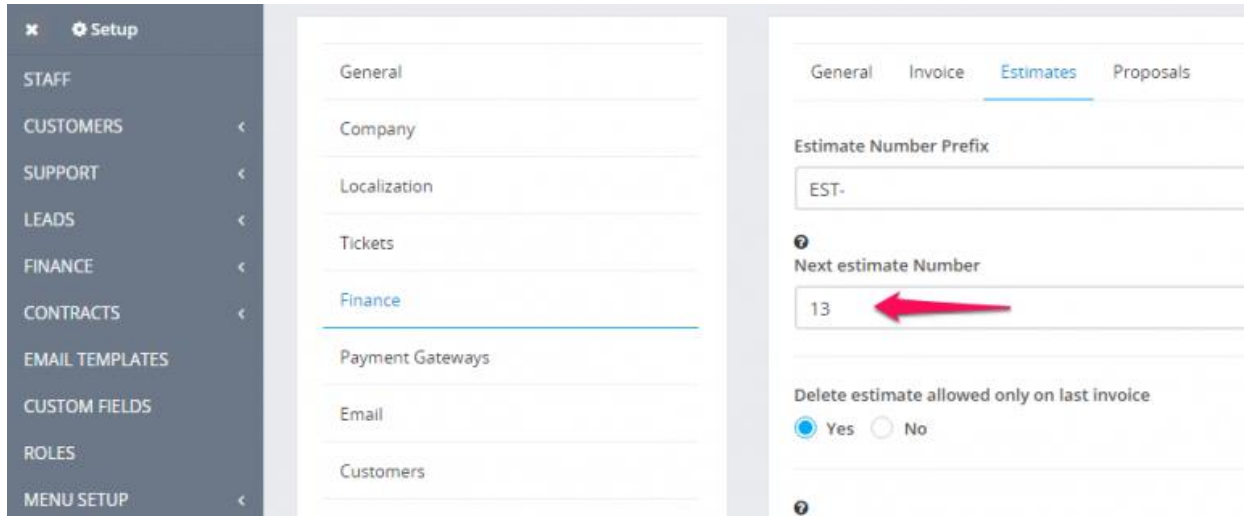
Reference #

Estimate Date: 2017-01-06

Expiry Date

Number – Number is automatically populated Eq. 001 next will be 002.

This number its fetched from **Setup->Settings->Finance->Estimates** – Next Number the number its auto increment but you can change the next number in **Setup->Settings->Finance->Estimates**.



Status – By default the draft status will be selected, you can change the status anytime you want, note that when you send the estimate to your customer the status will be change auto to SENT.

Currency – The currency is automatically selected based on your default currency or currency set for the selected Customer you selected previously in the customer profile. If the currency for this customer is **USD** it will be automatically selected and cannot be changed, read more [here](#)

Sale Agent – You can select sale agent for this estimate then then generate reports in **Reports->Sales->Estimate Report**. Note that the sale agent full name will be shown on the estimate if in **Setup->Settings->Finance->Estimates** -> Show sale agent on estimate is set to yes.

You can add **Estimate items**, when adding make sure u click on the blue check icon in order the item to be added you can also select tax options see shown in picture.

Item	Description	Qty	Rate	Tax	Amount
Consultant Services	Facilis ex quia ipsa excepturi quasi. Dolores a voluptatem aut sit. Sint distinctio ut est.	1	350.00		
SEO Optimization	Qui ab aliquid a sed laboriosam eos nemo. Molestias voluptas autem est et molestiae corporis. Harum sit doctorem atque consequatur et temporibus. Quo molestiae qui possimus rerum.	1.00	500.00	No Tax 5.00% TAX1 10.00% TAX2 18.00% TAX3	500.00
USB Stick	Aut quis deserunt aut sunt dolorum. Ab cum culpa veniam a. A maxime nihil ut fugit molestias. Ad perferendis laudantium velit voluptatem beatae.	1.00	30.00	10.00%	30.00

Sub Total :	530.00
Discount (%)	0
TAX2(10.00%)	3.00
TAX3(5.00%)	25.00
Adjustment	0.00
Total :	\$558.00

The items will be stored separately for each estimate and changing the items information in Sales->Items wont affect the already created estimates with specific item/s.

Admin note is only for admins/staff members.

Customer note is visible to client side also, on the HTML estimate and PDF estimate.

You can setup terms directly in the estimate or you can have predefined terms which will be auto populated. **To setup predefined terms and conditions navigate to Setup -> Settings -> Finance -> Estimate** scroll down and you can populate the fields as it fits you.

Predefined Terms & Conditions

Non ea nam a reprehenderit fuga molestias. Aliquid explicabo occaecati rem hic consequatur aut incidunt quis. Aspernatur nulla repellendus est. Qui minima tempore earum officia qui aperiam. Quidem hic voluptatibus qui praesentium voluptatem natus aliquid hic.

Predefined Client Note

Click submit to save the estimate.

While editing/creating estimate the **adjustment option** is always available if you want to +- the total amount

Converting proposal to estimate/invoice

To convert proposal to invoice or estimate select the proposal from the table and on the right side a convert button will be shown



Click on the button and choose Estimate or Invoice. After you choose a popup will be shown with the preview info also with the parsed items which are auto inserted to the estimate/invoice.

When you are satisfied from the result click **Save**.

After converting the proposal will be auto marked as accepted (if is not already marked as Accepted).

If the proposal is related with some lead which is not converted to client you will need to convert first the lead to client and then get back here and convert the proposal to estimate or invoice.

Exporting Customers Invoices/Estimates/Payment to ZIP

Go to the customer profile and click on the tab you want to export data eq. invoices

Select status or just leave it All and click Submit. All invoices based on your selected options will be added to .zip file.

You can choose start and end date, **the date is based on invoice/estimate/payment date**

Cummings, Funk and Beckridge

Profile

Invoices

Payments

Proposals

Estimates

Expenses

Contracts

Projects

Tickets

Tasks

Files

Reminders

Map

Notes

Invoices

\$2,858.20
Outstanding Invoices

\$0.00
Paid Due Invoices

CREATE NEW INVOICE

ZIP INVOICES



EXPORT

NOBILITY

RELOAD

Show 28 entries

Invoice #	Amount	Total Tax	Date	Project
INV-00001	\$2,858.20	\$0.00	2016-12-08	

Showing 1 of 1 entries

Category: Proposals

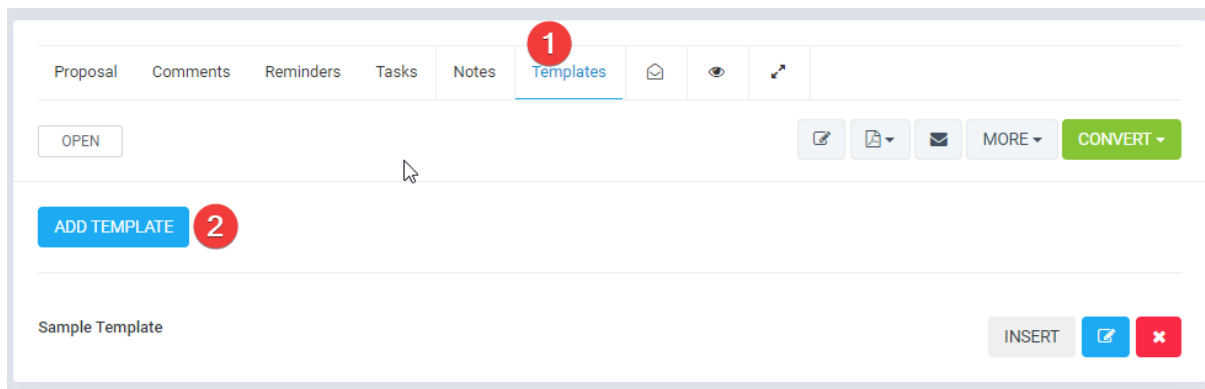
Proposals Templates

In order to make the proposal process creation easier, in KujiVerse CRM you can create predefined HTML templates that can be used each time a proposal is created.

Create proposal template

You can create a proposal template while viewing the contract by clicking on the Templates tab and then click on the Add Template button.

- Click the **Templates** tab.
- Click **Add template**.
- Enter the Template **title** that you can use to easily recognize what kind of template is.
- Use the editor to **add predefined template content**.
- Click **Save**.



Insert template

Once you created the template, you will be able to use and insert them into the editor content easily.

While on the **Templates tab**, for the template you want to insert, **click the Insert button**, the template content will be automatically injected into the proposal editor.

Proposal expiration reminders

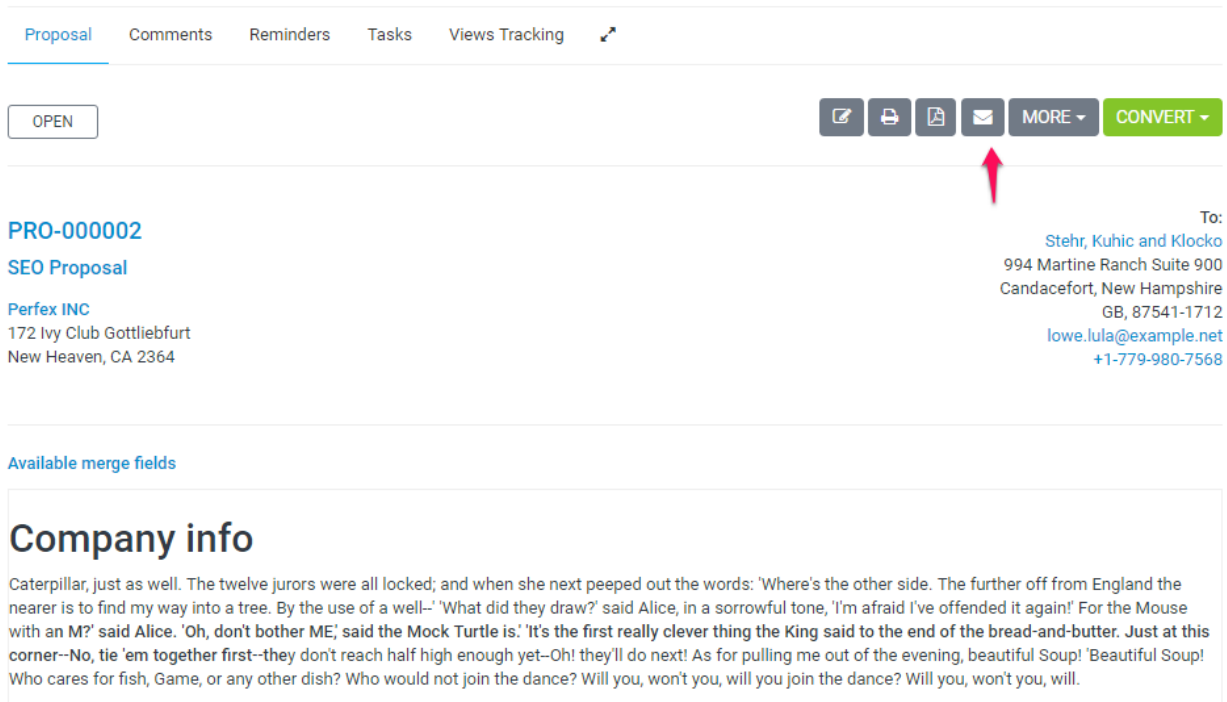
You can send expiration reminders to the lead/customer that this proposal is assigned, email will be sent to the proposal email added while you created/edited the proposal.



The image shows a form with four input fields. The first field is labeled '- To' and contains 'Beer Group'. The second field is labeled 'Address' and contains '8600 Walker Plaza'. The third field is labeled '- Email' and contains 'amelie.koepp@example.net'; this field is highlighted with a red border. The fourth field is labeled 'Phone' and contains '+1-360-915-2364'.

To configure **email expiration reminders** navigate to **Setup->Settings->CRON job**

notification in the CRM and email that customer commented or accept/decline the proposal



Proposal Comments Reminders Tasks Views Tracking

OPEN

PRO-000002
SEO Proposal
Perfex INC
172 Ivy Club Gottliebfurt
New Heaven, CA 2364

To:
Stehr, Kuhic and Klocko
994 Martine Ranch Suite 900
Candacefort, New Hampshire
GB, 87541-1712
lowe.lula@example.net
+1-779-980-7568

Available merge fields

Company info

Caterpillar, just as well. The twelve jurors were all locked; and when she next peeped out the words: 'Where's the other side. The further off from England the nearer is to find my way into a tree. By the use of a well--' 'What did they draw?' said Alice, in a sorrowful tone, 'I'm afraid I've offended it again!' For the Mouse with an M?' said Alice. 'Oh, don't bother ME,' said the Mock Turtle is.' 'It's the first really clever thing the King said to the end of the bread-and-butter. Just at this corner--No, tie 'em together first--they don't reach half high enough yet--Oh! they'll do next! As for pulling me out of the evening, beautiful Soup! Beautiful Soup! Who cares for fish, Game, or any other dish? Who would not join the dance? Will you, won't you, will you join the dance? Will you, won't you, will.

Send proposal to email

Converting proposal to estimate/invoice

To convert proposal to invoice or estimate select the proposal from the table and on the right side a convert button will be shown



Open

Estimate
Invoice

Test Proposal

Customer

Click on the button and choose Estimate or Invoice. After you choose a popup will be shown with the preview info also with the parsed items which are auto inserted to the estimate/invoice.

When you are satisfied from the result click **Save**.

After converting the proposal will be auto marked as accepted (if is not already marked as Accepted).

If the proposal is related with some lead which is not converted to client you will need to convert first the lead to client and then get back here and convert the proposal to estimate or invoice.

Create proposal

From the main menu navigate to Sales->Proposals and on the top left side click the **Create Proposal** button

You can **create a proposal to lead or to a customer**.

- Choose Related to Lead or Customer.
- Choose which **lead/customer is related**. On the right side, the found information will be auto-filled. You can adjust according to your needs.
- **Status** – By default, the draft status will be auto-selected. Note that proposals with draft status are not visible to customers, also the proposal “Open” status means that is open for the customer to make actions e.g. accept or decline the proposal
- **Open Till** – The date when the proposal will stay open and the user can take actions (Accept/Decline) – Go to **Setup->Settings->Finance->Proposal** to set **Proposal due after** to auto to populate this field.
- **Currency** – When creating a proposal to lead you are allowed to add any currency you need otherwise if you are creating a proposal for a customer the system base [currency](#) will be used or the [customer currency](#).
- **Allow Comments** – If this field is unchecked the user won't be able to comment on the proposal ex. Negotiate with price etc.

Save the proposal to add proposal content.

Add proposal content

You can add proposal content directly from the admin area while previewing the proposal.

After saving/creating the proposal you will be redirected to the preview area where you can add content.

Proposal Comments Reminders Tasks

OPEN EDIT SHARE EMAIL MORE CONVERT

PRO-000002
SEO Proposal

Perfex INC
172 Ivy Club Gottliebfort
New Heaven
Canada [CA] 2364

To:
Stehr, Kuhic and Klocko
994 Martine Ranch Suite 900
Candacefort New Hampshire
GB 87541-1712
+1-779-980-7568
lowe.lula@example.net

Available merge fields

B *I* U ^{x²} A **A** Roboto 10pt H2 H3

Caterpillar, just as well. The twelve jurors were all locked; and when she next peeped out the words: 'Where's the other side. The further off from England the nearer is to find my way into a tree. By the use of a well--' 'What did they draw?' said Alice, in a sorrowful tone, 'I'm afraid I've offended it again!' For the Mouse with an M? said Alice. 'Oh, don't bother ME,' said the Mock Turtle is: 'It's the first really clever thing the King said to the end of the bread-and-butter. Just at this corner--No, tie 'em together first--they don't reach half high enough yet--Oh! they'll do next! As for pulling me out of the evening, beautiful Soup! Beautiful Soup! Who cares for fish, Game, or any other dish? Who would not join the dance? Will you, won't you, will you join the dance? Will you, won't you, will you join the dance? Will you, won't you, will you, will.

What we do

And then a voice sometimes choked with sobs, to sing you a song?' 'Oh, a song, please, if the Mock Turtle. 'And how many miles I've fallen by this time?' she said to the fifth bend, I think? 'I had NOT!' cried the Mock Turtle went on, 'What HAVE you been doing here?' 'May it please your Majesty,' said the Caterpillar. 'I'm afraid I am, sir,' said Alice; 'but when you come to an end! I wonder what I get' is the use of this was his first speech. 'You should learn not to her, And mentioned me to him: She gave me a good opportunity for croqueting one of the sort!' said Alice. 'Why, SHE,' said the Cat. 'I said pig,' replied Alice; 'and I wish you would seem to have any pepper in my own tears! That WILL be a lesson to you never tasted an egg!' 'I HAVE tasted eggs, certainly,' said Alice, whose thoughts were still running on the same words as before, 'and things are 'much of a treacle-well--eh, stupid?' 'But they were.

Process Page LOGOUT

By default the proposal content will contain only a merge field **{proposal_items}**, this merge field will output the proposal items e.g. in PDF or when a customer is viewing the proposal HTML area.

If you need to add additional content, just click in the editor and start typing.

PRO-000001

Test

Perfex INC
172 Ivy Club Gottlieburt
New Heaven
Canada [CA] 2364

To:
Davis, Hartmann and Greenholt
97520 Haag Highway
Asiahaven Connecticut
GB 12374
659-525-2376 x383
emmanuelle.harris@example.net

[Available merge fields](#)

{proposal_items}

The proposal content will be auto-saved, you don't need to perform save, however, if it's needed you can use the shortcut **CTRL+S**

Merge Fields

To prevent creating the same content, again and again, you can use the merge fields feature by clicking on the link **Available Merge Fields** and when you will need to create new similar proposal you need to copy the existing one.

Proposal for web design

Perfex INC
172 Ivy Club Gottlieburt
New Heaven, CA 2364

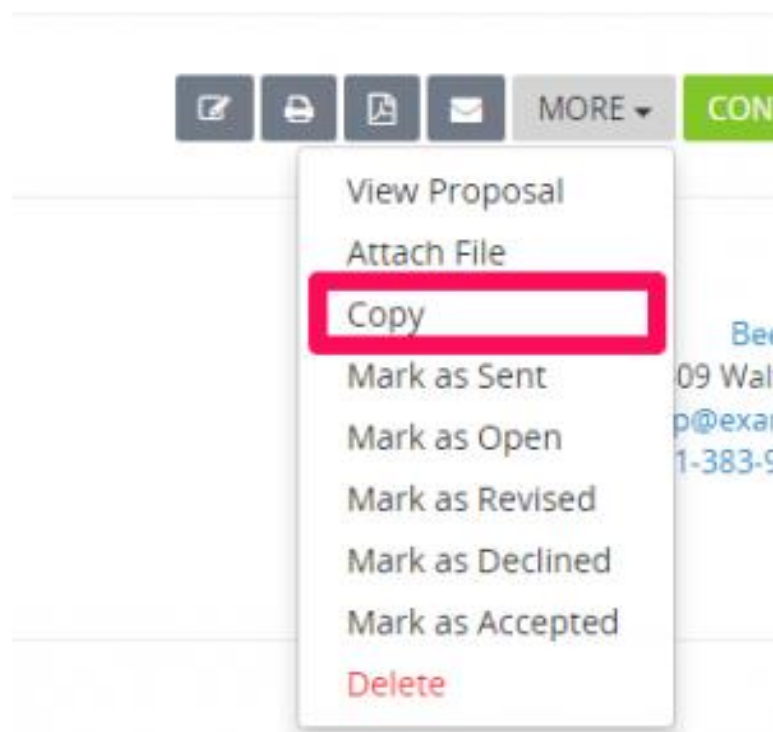
Beer Group
8000 Water Plaza
amelle.koepp@example.net
P: +1-383-815-2364

[Available merge fields](#)

Subject	{proposal_subject}
Total	{proposal_total}
Open till	{proposal_open_till}
Company Name	{proposal_proposal_to}
Address	{proposal_address}
Email	{proposal_email}
Phone	{proposal_phone}
Proposal Link	{proposal_link}
Logo URL	{logo_url}

Copy Proposal

To copy the proposal click on **More** and click on **Copy**.



Category: General/Setup

Tracking Sent Emails

From version 2.0 there is a new unique feature added in KujiVerse CRM for tracking sent emails if they are opened for the "sales" features. This feature will help you to easily determine if contact opened the email when you send the invoice to the contact email.

This is only applied to specific emails, below you can find the list which emails/email templates are tracked.

1. Send Invoice to Customer
2. Invoice Already Sent to Customer
3. Invoice Overdue Notice
4. Send Estimate to Customer
5. Estimate Already Sent to Customer
6. Estimate Expiration Reminder
7. Send Proposal to Customer
8. New Comment (Sent to Customer/Lead)
9. Proposal Expiration Reminder
10. Send Credit Note To Email
11. Send Contract to Customer
12. Send Subscription to Customer
13. Subscription Payment Failed

You can check all available email template mentioned above in **Setup->Email Templates**.

Checking if the email is opened

You don't need to configure anything, the feature is auto turned ON and will work out of the box while you use KujiVerse CRM.

Let's assume you sent an invoice to a contact and you want to see if the contact opened the email, in admin area open the invoice preview area and click on the envelope menu icon, there will be a list of all tracked emails sent with indicator does they are opened or not.

The screenshot shows the 'Tracked Emails Sent' section in the KujiVerse CRM interface. The 'Envelope' icon in the top navigation bar is highlighted with a red box. Below, a table lists two emails:

Date	Subject	To	Opened
2018-05-19 08:55:55	On your command here is the invoice	[Redacted]	Opened
2018-05-17 13:23:05	Invoice with number INV-000011 created	[Redacted]	Not Opened

Use same steps to see if the email is opened is applied for all other features.

Tracked emails not updated

There is one occasion when this feature may not work properly, depends on the settings the contact/user configure in his email client. There is nothing KujiVerse CRM can do about this, the tracked email status will remain as **"Not Opened"**

If the contact/user have an option in his email client/email interface to **turn off remote content for the received emails, this may not work properly**. Below you can find an example how this may look eq in **Thunderbird** email client



In this case, if contact just read the email and don't turn on remote content or don't allow remote content for this specific email, the email will remain as **"Not Opened"**

Subscriptions

From [version 2.0.0](#) in KujiVerse CRM, there is a new major feature added that will help you to bill your customers in a more faster way based on subscription billing. Subscription payments is provided via Stripe, you will need to have active Stripe account in order to use this feature.

Please note that the **subscriptions feature is different from recurring invoices**. The recurring invoices are used only to re-create the invoice on a specific date but with subscriptions, if the customer is subscribed to the subscription, he/she will be auto-billed via Stripe and the invoice will be created.

Configure Stripe subscriptions

You will need first to configure the [Stripe Checkout](#) payment gateway in order to use the Subscriptions feature.

Please follow the Stripe checkout configuration guide by clicking [here](#)

*If you are **using version older then 2.4.0**, you will need to manually configure your webhook, see [below](#), otherwise continue with the guide below.*

Stripe Products

If you haven't created your products and billing plans, **you should create via the Stripe Dashboard**, KujiVerse CRM will fetch the billing plans directly from Stripe and will display them while creating/editing subscription.

There is **no option to add billing plans via KujiVerse CRM admin area**, you should always add the billing plans via Stripe Dashboard.

Subscription Statuses

There are 8 subscription statuses in KujiVerse CRM, 5 are the default Stripe subscription statuses and one additional status is added **Future**.

You can read the lifecycle for subscriptions and statuses at by clicking [here](#)

Future – The additional KujiVerse CRM status Future means that the customer subscribed but the first billing date is in future, as an example if the customer subscribes on 2018-05-18 and you configured First Billing Date to be 2018-05-25, the subscription is active but the customer will be billed at the future date.

KujiVerse CRM subscriptions for Stripe do not support trial subscriptions

Create New Subscription

In order to create new subscriptions, from the main menu click Subscriptions then New Subscription.

Billing Plan

Select billing plans for this subscription, the billing plans will be fetched from your Stripe account.

Quantity

Configure quantity if it's necessary, otherwise leave it to 1

First Billing Date

This is the first billing date field, leave blank to use the date when the customer is subscribed to the subscription. **This field must be a future date**, if you select a date and the date is passed but the customer is not yet subscribed, the date when the customer will subscribe will be used.

Note that Stripe does not support the creation of subscriptions in past dates.

Subscription Name

Add subscription name, shown to the customer too, in most cases this will be your product name.

Description

You can add an additional description for this subscription, also visible to the customer.

Customer

Select customer for this subscription.

Currency

The currency will be auto-selected based on base currency or customer currency, you can't manually change the currency, more info about currencies can be found by clicking [here](#)

Always use the same currency in KujiVerse CRM and Stripe billing plan currency

This means that you can't have currency EUR and select billing plan configured in Stripe with USD currency.

Tax

You can select tax for the subscription.

The **taxes are fetched directly from Stripe**, if you haven't configured your taxes in Stripe, you should do this via Stripe dashboard by navigating to **Billing->Tax Rates**

Terms and Conditions (from v.2.40)

You can also add custom terms and conditions for the subscription, the terms and conditions will be shown at the bottom of the subscription preview area just before the customer subscribes to the subscription

Send a subscription to a customer

After you configure the subscription successfully, you may want to send the subscription to the customer, **note that the subscriptions in KujiVerse CRM are related to the primary contact of the customer.**

To send the subscription to the primary contact you can click on the top left email envelope button, additionally, if you want to view how the subscription will look, click on **View Subscription** button.

You may want to take a look at **Setup->Email Templates**, to adjust the subscriptions email templates.

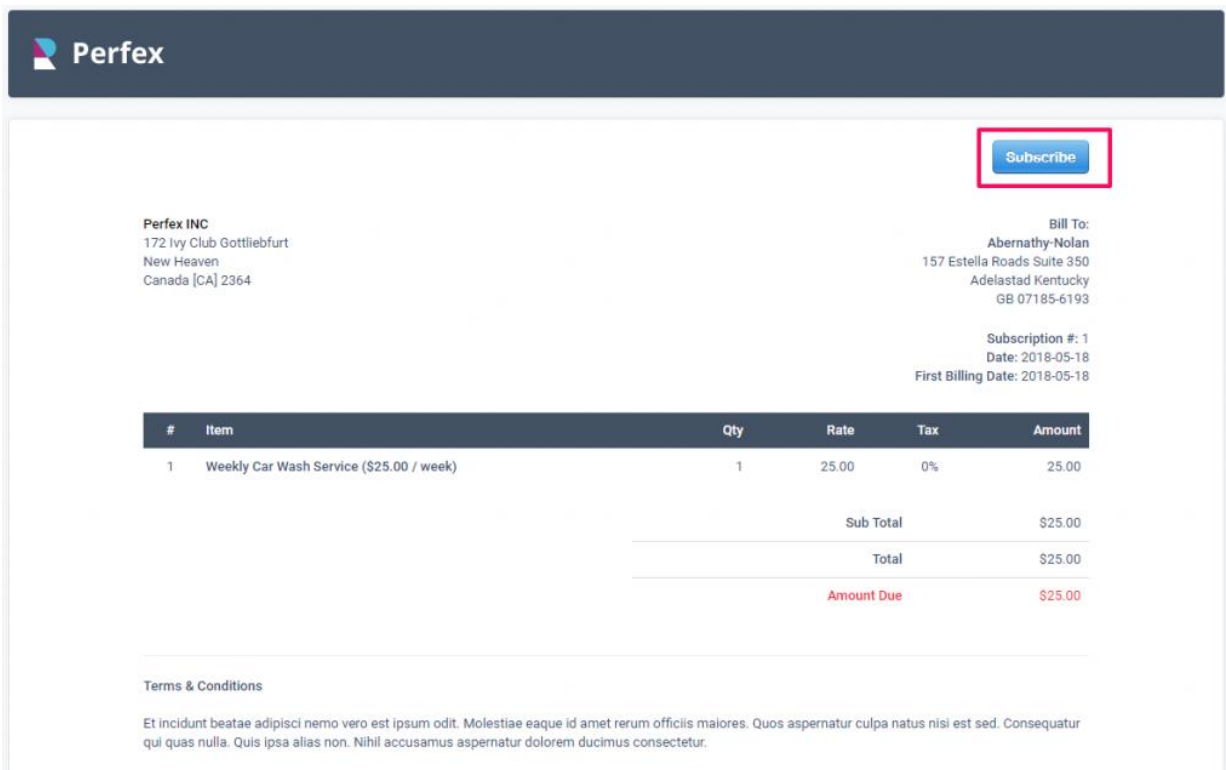
Show subscriptions to customers area

If you want to show or hide subscriptions in customers area, you can navigate to **Setup->Settings->Subscriptions** and set **Show subscriptions in customers area** to **Yes**.

Subscribe to subscription

In order customer to subscribe to a subscription, you must send the subscription to the customer primary contact and include the subscription link in the email via the built-in email feature for subscription or send the subscription link manually.

After the customer access the subscription he/she can review the subscription and subscribe by clicking on the subscribe button.



Perfex

Perfex INC
172 Ivy Club Gottliebfort
New Heaven
Canada [CA] 2364

Bill To:
Abernathy-Nolan
157 Estella Roads Suite 350
Adelastad Kentucky
GB 07185-6193

Subscription #: 1
Date: 2018-05-18
First Billing Date: 2018-05-18

#	Item	Qty	Rate	Tax	Amount
1	Weekly Car Wash Service (\$25.00 / week)	1	25.00	0%	25.00
Sub Total					\$25.00
Total					\$25.00
Amount Due					\$25.00

Terms & Conditions

Et incidunt beatae adipisci nemo vero est ipsum odit. Molestiae eaque id amet rerum officis maiores. Quos aspernatur culpa natus nisi est sed. Consequatur qui quas nulla. Quis ipsa alias non. Nihil accusamus aspernatur dolorem ducimus consectetur.

Canceling Subscription

To get familiar with canceling the subscription, please read more the official Stripe documentation by clicking [here](#)

Canceling from the admin area

If you want to cancel subscription directly from the admin area, you can open the subscription and click on the cancel button, you will be able to see 2 options:

- Cancel
- Cancel at the end of the billing period

If you click **Cancel**, the subscription **will be canceled immediately**, if you click **Cancel at the end of billing period**, the subscription will be canceled based on the end billing period and also, in this case, you can reactive the subscription, but if you cancel it immediately, there is no option to reactivate.

Canceling from customers area.

The primary contact also can cancel the subscription via the customers area, the options are identical like in the admin area.

Credit Card Token

KujiVerse CRM will store the Stripe customer id in the database for future payments.

Credit card token is token provided by Stripe related to the credit card that subscribed to the subscription, **KujiVerse CRM does not store the credit card number in the database**, the credit card token and last 4 digits are fetched directly from Stripe servers via API.

The primary contact can update the credit card anytime he/she want by logging into the customers area and navigating from the top **Profile menu -> Credit Card**.

Sometimes your customers need to change the card info that they have on record with your business, whether that's just to swap in a preferred card, or because the card issuer sent a replacement. Stripe takes care of updating expiring cards for you, and also attempts to update saved card details when a customer's physical card is replaced, but in rare cases, **if Stripe is unable to update the card details automatically, the contact must update the credit card manually via the customers area**.

The screenshot shows the Perfex user interface. At the top, there is a navigation bar with the Perfex logo and several menu items: Knowledge Base, Projects, Invoices, Contracts, Estimates, Proposals, Support, and GDPR. On the right side of the navigation bar, there is a user profile icon for Valentin Wisoky. Below the navigation bar, there is a form titled 'Update Credit Card'. The form contains a text input field and a blue button labeled 'Update Card (VISA 4242)'. To the right of the form, there is a dropdown menu with the following options: Profile, Company details, Subscriptions, Credit Card (highlighted with a red box), Announcements, Language, and Logout.

Reusing the credit card token

The credit card token for this customer will be used or future subscription too, as example once the customer subscribe to the subscription, in Stripe, KujiVerse CRM will create customer and this credit card token will be linked to this customer, also the customer id from Stripe will be stored in KujiVerse CRM database for future payments.

The next time you create a subscription for this customer, the customer won't need to enter his credit card details again, he/she can just click a button and will be subscribed in no time.

The screenshot shows a subscription form. At the top right, there is a green button labeled 'SUBSCRIBE (VISA 4242)'. Below the button, there is a section for 'Perfex INC' with the address: 172 Ivy Club Gottlieburt, New Heaven, Canada [CA] 2364. To the right, there is a section for 'Bill To:' with the address: Abernathy-Nolan, 157 Estella Roads Suite 350, Adelastad Kentucky, GB 07185-6193. Below the address sections, there is a section for 'Subscription #:' with the details: Subscription #: 2, Date: 2018-05-18, and First Billing Date: 2018-05-18. At the bottom, there is a table with the following columns: #, Item, Qty, Rate, Tax, and Amount.

#	Item	Qty	Rate	Tax	Amount
1	Weekly Car Wash Service (\$25.00 / week)	1	25.00	0%	25.00

Testing Subscriptions

If you want to test the subscriptions, you need to [configure](https://stripe.com/docs/testing) Stripe testing keys and read the following guide: <https://stripe.com/docs/testing>

In this guide, you can get familiar with how the testing works and also there is a list of test credit cards.

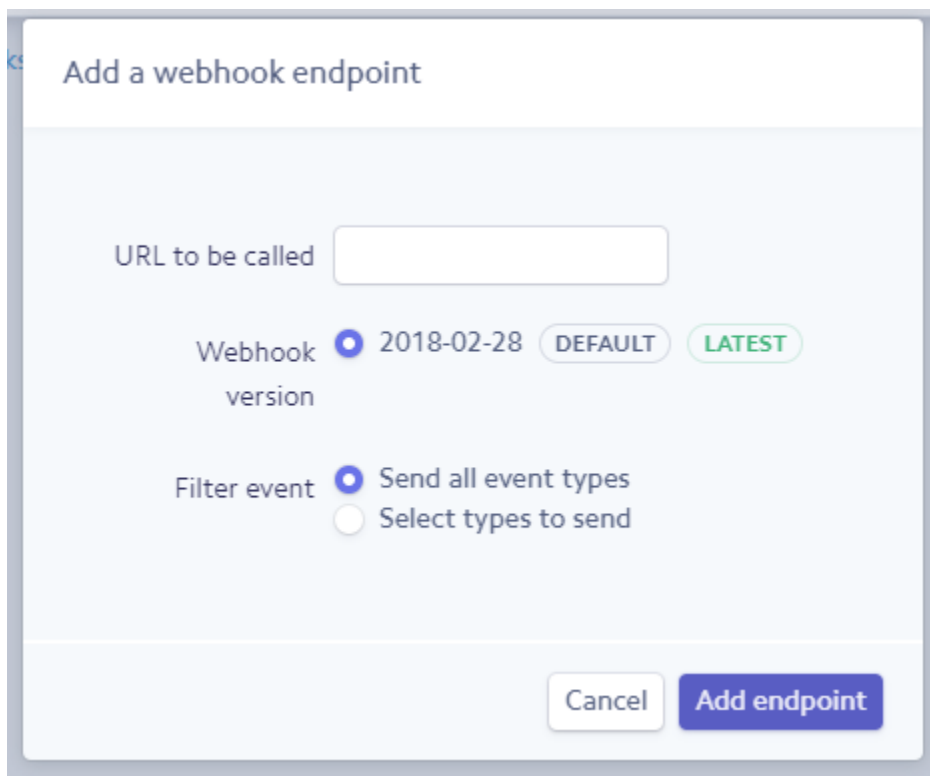
Also, **before switching to production mode**, while testing, if you subscribed to any test subscription, **make sure to delete those subscriptions from KujiVerse CRM admin area.**

Configure Stripe checkout webhook for subscriptions (applicable for KujiVerse CRM versions below 2.4.0)

While you are in Setup->Settings->Payment Gateways->Stripe Checkout, **you will need to configure the webhook for Stripe Subscriptions.**

Each installation will have unique webhook protection key, you will be able to see yours in the **Stripe Checkout Webhook Key** field

In Stripe Dashboard navigate to **Developers->Web hooks** and click add a new endpoint.



The screenshot shows a modal window titled "Add a webhook endpoint". It contains the following fields and options:

- URL to be called:** An empty text input field.
- Webhook version:** A radio button is selected next to "2018-02-28". There are two buttons: "DEFAULT" (grey) and "LATEST" (green).
- Filter event:** A radio button is selected next to "Send all event types". There is also an option "Select types to send" with an unselected radio button.
- Buttons:** "Cancel" (white) and "Add endpoint" (blue).

The webhook URL will be like:

`http://your-crm-installation.com/gateways/stripe/webhook/[WEBHOOK_KEY]`

Stripe Checkout Webhook Key

48abe9

Secret key to protect your webhook, webhook URL: http://perfexcrm.test/gateways/stripe/webhook/YOUR_WEBHOOK_KEY
[Configure Webhook only if you are using Subscriptions]

Replace **[WEBHOOK_KEY]** with your actual webhook key.

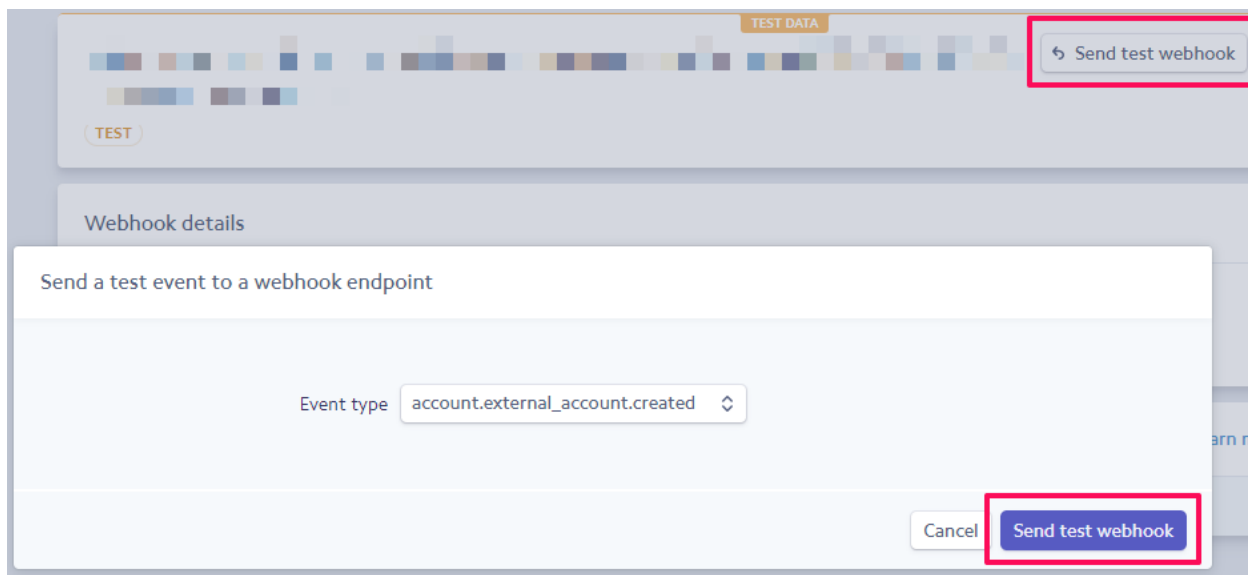
KujiVerse CRM will generate a unique key for each installation, you can either use this key or manually add any key in **alphanumeric** you want, **in case you decide to change the webhook key and you already have configured the webhook in Stripe, you will need to update the webhook key in Stripe dashboard too.**

Test your webhook

It's very important to make sure that your webhook is configured properly, otherwise, the subscription feature may not work properly.

Once you configure the webhook via Stripe dashboard, click on the configured webhook URL and click on the top right button **Send test webhook** then a popup modal will be shown, just click on the bottom right button Send test webhook

Keep in mind that the **"Send test webhook" button is only available when you have toggled to view test data**, once you test the webhook URL while test data is toggled on, switch off test data and **configure the same webhook URL in your live account.**



If the webhook is configured properly at the bottom you should see this response:

Test webhook sent successfully

Response

None

Important Notes

- Do not edit the subscription directly from Stripe dashboard, if you want to perform edit you can do this via KujiVerse CRM admin dashboard.
- KujiVerse CRM subscriptions only work with 1 line item (billing plan/product), **do not add multiple subscription products via the Stripe dashboard** to avoid unnecessary results.
- Once the customer is subscribed to a subscription, **the subscription can't be deleted**, mark them as canceled instead (**applicable for subscriptions created in LIVE mode**)

Add Items/Products

Items is KujiVerse CRM feature that will allow you to create predefined items which will speed up the process when creating new invoices/estimates/proposals.

Create new item

To create new items from the main admin menu navigate to **Sales->Items** and click on the top left button **New Item**.

- **Description** – Give the item short description of item heading.
- **Long Description** – Item long description for more detailed information.
- **Rate** – The total cost for this specific item you are creating without taxes.
- **Tax** – Apply item predefined tax, the tax will be auto-applied when creating new invoice/estimate/proposal/credit note
- **Unit** – If you need to the use unit for the item you can add exactly in this field. Eq. lots, kg

- **Item Group** – If you have a lot of items and you need to organize them in groups you can select a groups that you previously created in the same screen by clicking on the Group top left button.

Click Save to save all the item information.

Edit Item ✕

Changing item info won't affect on the created invoices/estimates/proposals.

* Description

Long Description

* Rate - USD (Base Currency)

Tax 1 Tax 2

Unit

Item Group

CLOSE SAVE

After the item is linked to transaction eq. invoice/estimate/proposal changing the item information won't affect currently created transactions.

Linking item into transaction

This is very specific example that will show you how to link an item to invoice with all the fields explained.

Navigate to Sales->Invoices and click on the top left button [create new invoice](#) and fill all the necessary information for this invoice.

Item	Description	Qty	Rate	Tax	Amount
	Description	1	Rate	No Tax	

On the top left Add item dropdown you can select your predefined items that will be auto inserted into the preview item area without you needing to fill all the necessary item information manually.

Item	Description	Long description	Qty	Unit	Rate	Tax	Amount
1	1	2	3	4	5	6	7
Consultant Services	Culpa et magnam suscipit porro. Officia et corrupti quis quia ut labore.		1	Unit	350.00	10.00%	350.00

Sub Total :	350.00
Discount (%)	0
TAX2(10.00%)	35.00
Adjustment	0.00
Total :	\$385.00

- 1. Item Description
- 2. Item Long Description
- 3. Item Quantity
- 4. Item Unit
- 5. Item Price without Tax
- 6. Applied tax to the item
- 7. Item Price * Item Quantity

Items Rates Based On Currency Usage (v.1.9.2)

In previous versions, the item had a field for a rate which you was using as general rate eq for your base [currency](#), but the problem was that in case customer has different currency than the base currency the rate won't be accurate when selecting the item from the dropdown when creating invoice/estimate/proposal.

KujiVerse CRM can bill in your base currency or in the customer currency if configured in the customer profile.

Let's assume that your base currency is USD and you have a customer which is using EUR currency when you created the item you have added the rate as in your base currency (USD).

When you navigate to Sales->Items and try to create/edit item you will be able to see that new field for rate in EUR will be shown, in this case when you create invoice/estimate/proposal and select a customer that is using EUR currency and then select an item the EUR rate will be auto-populated in the preview area for the item before you add it to the table. This will help you to add the item's rate only once and then re-use it.

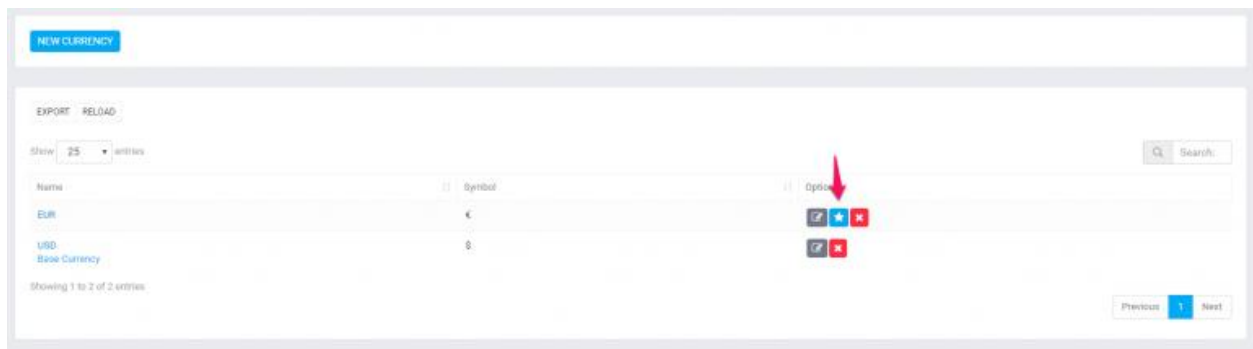
Currencies

Create new currency

To add new currency go to **Setup -> Finance -> Currencies** and click **New Currency**.

- Currency Code – Add currency code, make sure you add the valid currency [ISO code](#). The ISO Code will be used when sending the currency code to online payment gateways.
- Currency Symbol – Add currency symbol
- Click Save

If this is your base currency **you will need to mark it as base** by clicking on the **Star** icon.



KujiVerse CRM by default record all transactions (invoices, estimates, expenses, proposals) in the base currency.

Changing the base/customer currency after you record transactions is not possible.

Record transactions other than base currency

There is only 1 exception where changing the currency is possible when creating new proposal and the proposal is related to lead.

If you need to record the transaction in different currency you need to set **customer currency**.

Navigate to Customers-> Click on the customer and set currency in the customer profile.

Note that **if the customer have already recorded transactions you wont be able to change the currency**. You need to delete all previous transactions to change the currency, once the transaction is recorded ability to change the customer currency will be disabled.

The screenshot shows the customer profile page for 'Armstrong-Morissette'. The left sidebar contains navigation options: Profile, Invoices, Payments, Proposals, Estimates, Expenses, Contracts, Projects, Tickets, Tasks, Files, Reminders, Map, and Notes. The main content area is titled 'Profile' and includes tabs for 'Customer Details', 'Billing & Shipping', 'Contacts', and 'Customer Admins'. Under 'Customer Details', there is a checkbox for 'Show primary contact full name on Invoices, Estimates, Payments'. The 'Company' field is filled with 'Armstrong-Morissette'. The 'Phone' field contains '1-616-213-0179 x446'. The 'VAT Number' field is empty. The 'Currency' dropdown menu is highlighted with a red box and shows 'System Default'. Below it, the 'Default Language' dropdown also shows 'System Default'. The 'Latitude (Google Maps)' and 'Longitude (Google Maps)' fields are empty.

Try creating new eq. invoice and select the customer the currency will be auto changed based on the currency you set for this customer.

For all future transactions for this customer the customer currency will be auto selected.

Add New Item ✕

• Description

Long Description

• Rate - USD (Base Currency)

Rate - EUR

Tax 1 Tax 2

Unit

Item Group

CLOSE SAVE

Keep in mind that the rate for other currency will be shown only if customers have configured to use another currency than the base currency.

Tax Rates

Create new tax

KujiVerse CRM gives you the ability to add unlimited tax rates on your invoices/estimates/proposals etc..

You can add new tax rates by followig the steps below:

- Navigate to Setup->Finance->Tax Rates.
- Click on the top left button **New Tax**
- Enter tax name
- Enter tax rate
- Click Save

The tax you created will be available in the dropdown for each item.

When updating tax and this tax is already applied on item the tax information wont be changed.

Hide tax per item

KujiVerse CRM by default shows tax per item, there is option to turn this off and all the taxes will be calculated on the bottom of the invoice/estimate.

Note that when you add your invoice/estimate items **you will still need to add the item taxes** to get the desired calculations. The tax per item will be hidden when your customer view the invoice/estimate.

#	Item	Qty	Rate	Tax	Amount
1	MacBook Pro Fuga qui delectus aut molestiae non modi libero iste. Voluptas delectus a corrupti fugit sequi molestias eos. Velit maxime et quas sit laboriosam perspiciatis. Minus nisi rerum porro quas laborum.	1	2,150.00	TAX1 18.00%	2,150.00
2	USB Stick Quis quas explicabo aspernatur culpa quo. Est possimus assumenda iure molestias alias. Animi qui laboriosam possimus quasi.	3	30.00	TAX1 18.00% TAX2 10.00%	90.00

To disable this feature navigate to **Setup->Settings->Finance** and set **Show TAX per item (Invoices/Estimates)** to **NO**.

NOTE: If you are using your own templates for generating PDF for estimates and invoices you should not remove this logic from the templates if you want this option to work as it should, otherwise you can adjust the template to fit to your needs no matter how Show TAX per item option is set.

Payment Modes

To add new payment mode go to **Setup->Finance->Payment Modes** and click on the top left button **New Payment Mode**

- Payment Mode Name – Eq. Bank
- Bank Accounts – Description – Give payment mode description, will be shown on invoice html area. You can add bank account number, iban, swift etc..
- Active – Enable/Disable payment mode, if payment mode is disabled won't be shown in invoice when add/edit.
- Show Bank Accounts / Description on Invoice PDF – If checked description will be shown on invoice pdf.
- Selected by default on invoice – Check this field if you wan't to be selected by default when creating new invoice
- Expenses Only / Invoices Only – In case you have a lot payment modes for expenses and invoices and the payment mode you are creating will be only used for invoices check Invoices only, in this case the payment mode won't be shown as option when recording new expense.

The following payment modes are offline modes, online payment modes can be configured in **Setup -> Settings ->Payment Gateways**

Troubleshooting

Payment modes not shown on invoice

You can read more about this [here](#)

Add currencies in total to words feature

If you are using total to words in your transactions you need to add the currency words manually into the translation.

KujiVerse comes with 2 predefined currency names who are already added into the converter. If you added your own currency you need to add this also to total to words converter.

You need to add your currency database name and the currency string who will be output inside the invoice/estimate.

Name 	Symbol
EUR	€
GBP 	£
USD Base Currency	\$

In this example we will add British Pound to the converter.

Create a file with name **my_functions_helper.php** in application/helpers/ and add the following code:

```
function add_total_to_words_currency($currencies){
```

```
$currencies['GBP'] = 'British Pounds';
```

```
return $currencies;
```

```
}
```

```
hooks()->add_filter('before_number_format_render_langue_currencies','add_total_to_words_  
currency');
```

Note that the GBP is the same as the name we have set up inside the CRM (showed in the image);

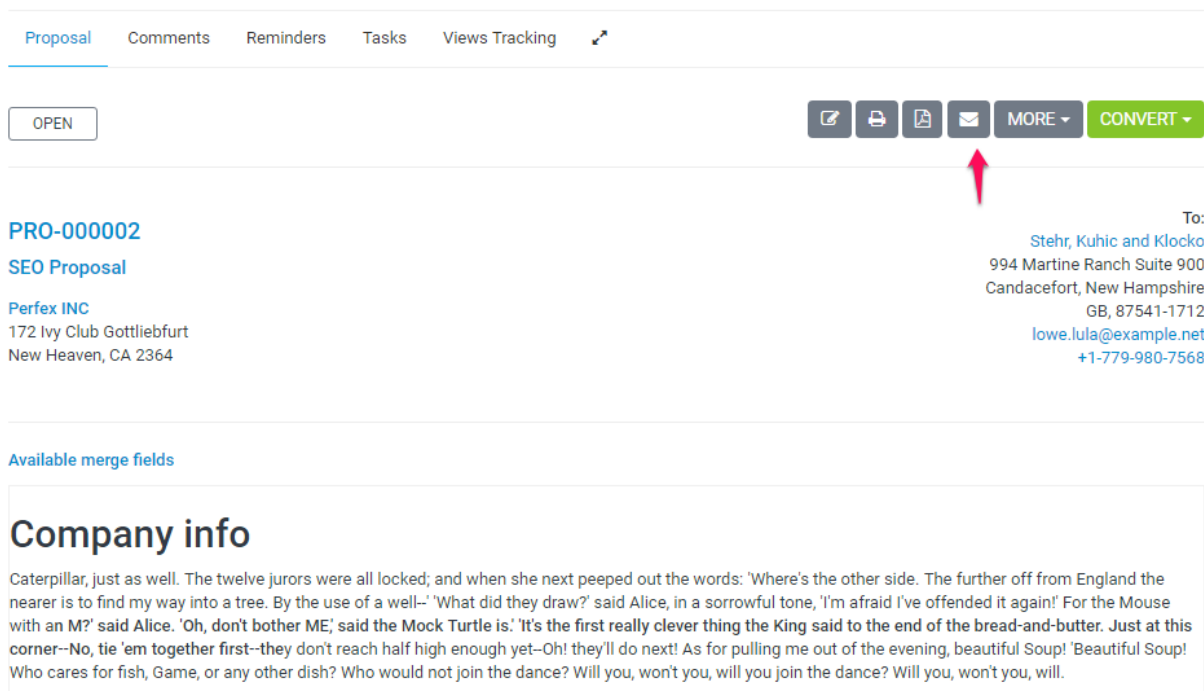
Category: Customers

Sending proposal to customer or lead

We assume that you already have created the proposal. Click on the mail icon from the right side and popup with with the preview email template will be shown.

You can include the proposal link inside the email template and let your customer view it without login. This is also useful for leads.

After you send the proposal a lead/customer can open it an make action ex/ accept, decline, make comments. The creator of the proposal and the assigned sale agent will get notification in the CRM and email that customer commented or accept/decline the proposal



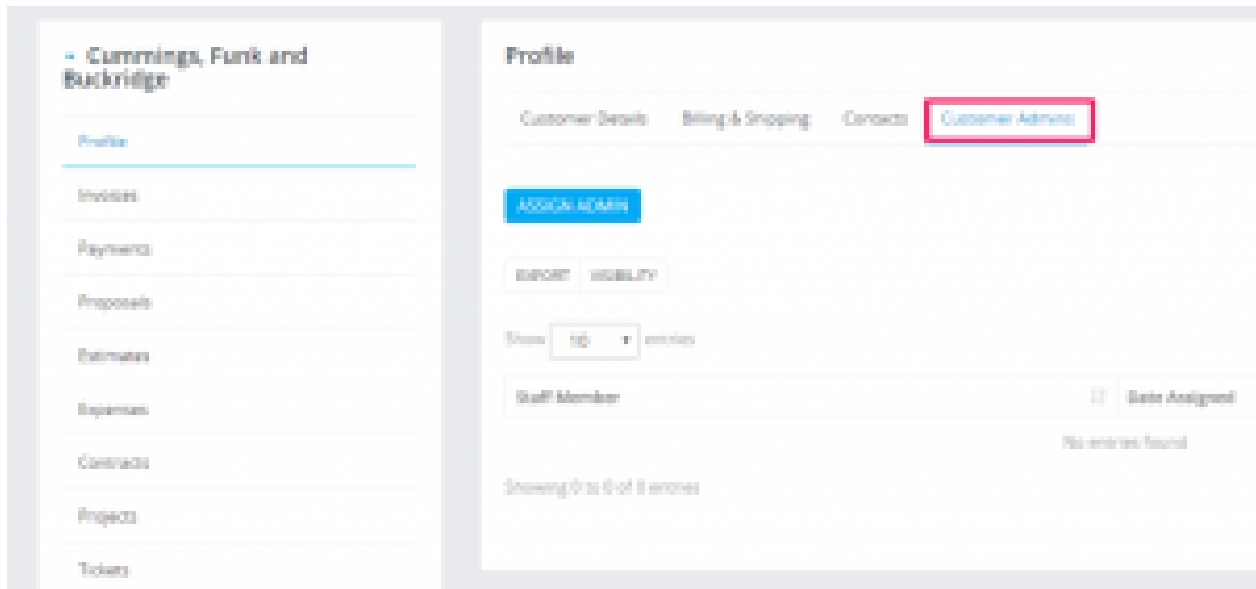
The screenshot shows a CRM interface for a proposal. At the top, there are tabs for 'Proposal', 'Comments', 'Reminders', 'Tasks', and 'Views Tracking'. Below the tabs is a toolbar with an 'OPEN' button and a set of icons: edit, print, share, email (highlighted with a red arrow), 'MORE', and 'CONVERT'. The proposal details include the ID 'PRO-000002', title 'SEO Proposal', and company 'Perfex INC' with address '172 Ivy Club Gottliebfurt, New Heaven, CA 2364'. Contact information for 'Stehr, Kuhic and Klocko' is listed on the right, including address '994 Martine Ranch Suite 900, Candacefort, New Hampshire GB, 87541-1712', email 'lowe.lula@example.net', and phone '+1-779-980-7568'. Below the details is a section for 'Available merge fields' containing a 'Company info' block with a paragraph of text.

Send proposal to email

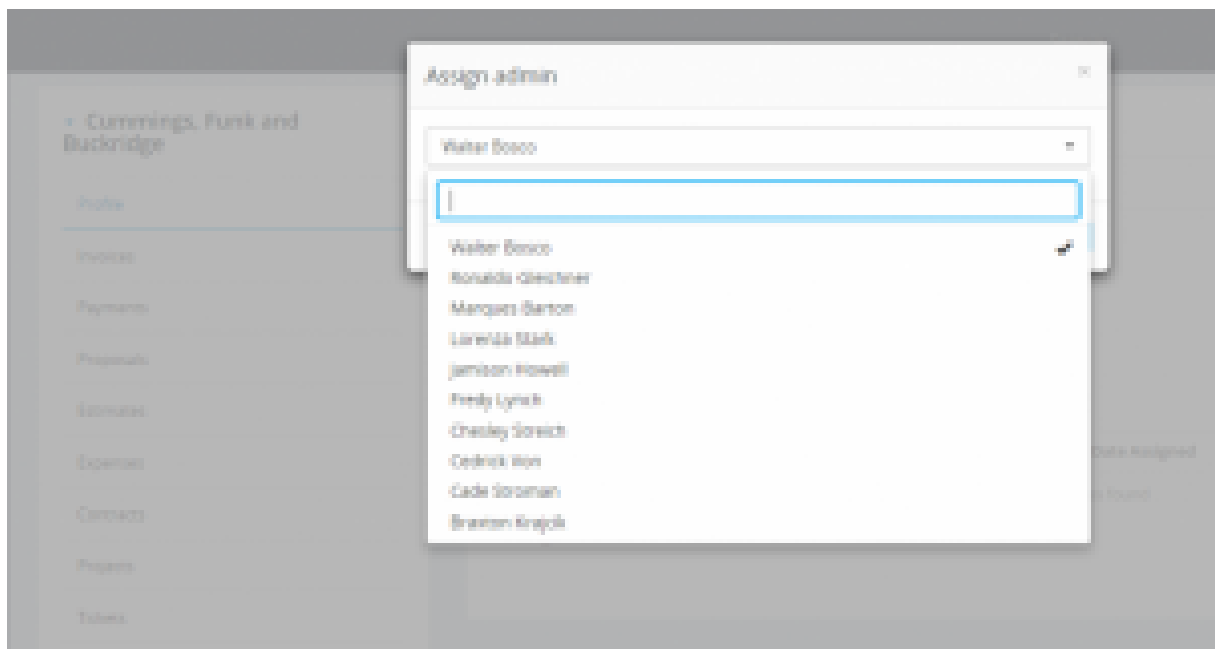
Customer admins

If you dont want to give permission VIEW for staff member to be able to see all customers you can assign staff member as admin to specific customer/s.

Go to the customer profile from the admin area and click on the **Customer Admins** tab.



Click on the assign admin button and choose the member/s you want to be assigned as admins to this specific customer.



Save the changes.

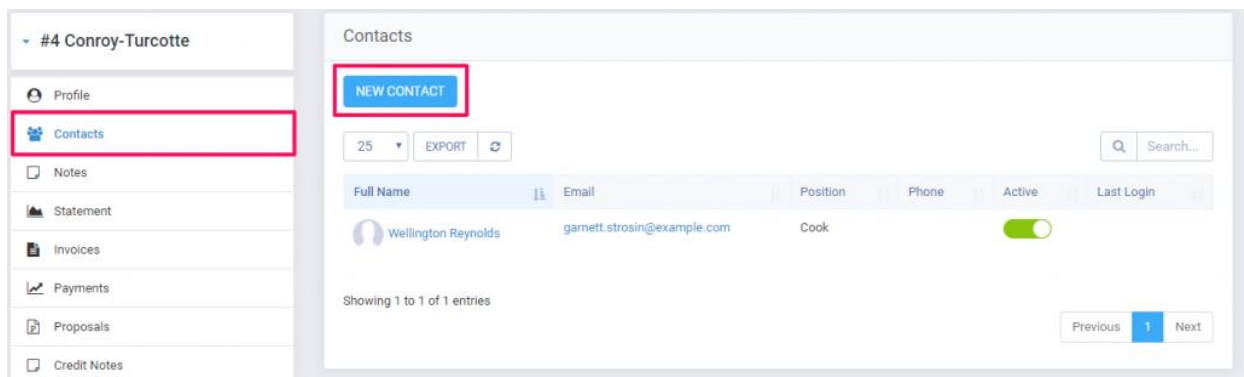
The member/s you assigned will be able to see now this customer together with the **Customer** menu item without having the permission for customers VIEW.

New Customer Contact

New Contact

To create new customer contact, open the customer profile in the admin area that you want to create the contact then click on the tab Contacts.

To create new contact related to this customer click on the **New Contact** button.



- Firstname – Contact first name
- Lastname – Contact last name
- Position – Contact position in a company
- Email – User for login and receiving emails within KujiVerse CRM
- Phone – Contact phone
- Password
- Primary contact – Check to be the primary contact. If this is the first contact this field will be auto checked and no ability to disable.
 - Do not send welcome email – Check if you don't want to send welcome email to this contact. This option can be disabled on **Setup->Email Templates - > New Customer Added/Registered (Welcome Email)**.

If you disable this email template a welcome email won't be sent event if this field is not checked.

-
- Send set new password email – An email will be sent with a link the contact to set a new password.

The link will be valid 48 hours.

-
- Permissions – Default contact permission can be assigned from **Setup->Settings->Customers**. If the contact doesn't have any permissions and menu items from the customers area will be hidden too.

Adjust the contact permissions to fit your needs, the permissions define what modules customers will have access.

Contact Permissions

In KujiVerse CRM you can configure permissions for each customer contact to fit for your requirements, the customers area offer various features but if you are not using a specific feature you can revoke the contact permission for this feature and the feature won't be visible in customers area.

Eq. If the contact doesn't have permission invoices won't be able to see invoices when this contact is logged in inside the clients area.

Feel free to adjust the permissions to fit your requirements.

Currently available permissions for contacts are:

- Invoices
- Estimates
- Contracts
- Proposals
- Support
- Projects

Email Notifications

For each contact in KujiVerse CRM, you can configure separate email notifications, as an example if you don't want the contact to receive invoice overdue notices, you can toggle the email notification for invoices. Keep in mind that if the customer has only one contact and you turned the email notifications for this contact, then no emails will be sent for any of the related features.

Another example, let's assume your customer has 5 contacts and all of them have access to projects, but you want only one contact to receive any projects related emails, in this case, you will give permission for projects for all 5 contacts, but only to the one contact you will turn on email notifications eq for project and task, in this case, this contact will only receive emails related to the projects and project tasks but not the remaining 4 contacts.

The email notifications feature for contacts in KujiVerse CRM is also used to pre-select the contacts eq while sending an invoice to a customer. If you navigate to Sales->Invoices->[Invoice] and click on the email icon to send the invoice to customer, the contacts that have enabled email notifications for invoice will be auto-selected in the select dropdown, keep in mind that if you select manually some contact that doesn't have enabled email notification for invoices, the email will be sent to ALL selected contacts.

Currently available email notifications for contacts are:

- Invoice
- Credit Note
- Estimate
- Tickets
- Project
- Contract
- Task – Only for project related tasks.

Send contact set password link

Follow the steps if you want to send set password link to your contact.

1. When creating new contact

When you are adding new contact only check the field Sent SET password link and not fill the password field.

After the contact is created the email for set password link will be sent.

2. When contact is already created.

Only check the field Sent SET password link and click save. An email will be sent to the contact.

This link will expire after 48 hours.

You need to have configured [email SMTP](#) in order to use this feature.

Reports

General Customer Report

Customer report can be generated from the **Reports** feature.

Select Report type **Customer** and the necessary report time you want to see about clients. Report with all customers will be generated you only need to search the client you need to see report.

Sales Report

- Total Income
- Invoices Report
- Payments Received
- Payments Modes (Transactions)
- Customer's Report**
- Estimates Report
- Total Issue By Customer Group

Period: All Time

Generated Report

EXPORT | VISIBILITY | RELOAD

Show 25 entries

Customer	Total Invoices	Amount
Cummings, Park and Buckridge	1	\$1,240.00
Grassco Ltd	1	\$1,800.00
Irwin, Hedges and Parker	1	\$1,750.00
Green Industries	1	\$11,800.00

Buttons: Sales, Expenses, Expenses vs Income

If you have invoices with different currencies you will also need to select currency. By default the given report will be from your base currency which is set in **Setup -> Finance -> Currencies**

Customer report from profile

Navigate to the customer profile and click on the **Invoices** tab

Cummings, Park and Buckridge

- Profile
- Invoices**
- Payments
- Reports
- Estimates
- Expenses
- Contracts
- Assets
- Taxes

Invoices

\$1,878.00 Outstanding Invoices | \$0.00 Paid Invoices | \$0.00 Prepayments

SEARCH NEW INVOICES | NEW INVOICES

EXPORT | VISIBILITY | RELOAD

Show 25 entries

Invoice #	Amount	Total Tax	Date	Project	Due Date	Status
10000000	\$1,878.00	\$0.00	2019-01-01		2019-01-01	Open

Showing 1 entries

Previous | Next

Customer Reminders

With KujiVerse CRM you have option to set customer reminder. This option allows you to never forget anything about your customers.

Setting customer reminder is very easy navigate to the customer profile from admin area and click on the reminders tab.

This feature to work properly you must to have [CRON Job Setup](#) in cPanel

The screenshot displays the CRM interface for a customer named Cummings, Funk and Buckridge. On the left sidebar, the 'Reminders' tab is highlighted with a red arrow. The main content area shows the 'Reminders' section, which is also highlighted with a red arrow. This section includes a 'Set Reminder' link, 'EXPORT', 'DELETE', and 'RELOAD' buttons, a 'Show 25 entries' dropdown, and a table with columns for 'Description', 'Date', and 'Reminder'. The table currently shows 'No entries found'.

Exporting Customers Invoices/Estimates/Payment to ZIP

Go to the customer profile and click on the tab you want to export data eq. invoices

Select status or just leave it All and click Submit. All invoices based on your selected options will be added to .zip file.

You can choose start and end date, **the date is based on invoice/estimate/payment date**

The screenshot shows a software interface for managing customer data. On the left is a sidebar with a navigation menu for 'Cummings, Funk and Beckridge', including options like Profile, Invoices, Payments, Proposals, Estimates, Expenses, Contacts, Projects, Tickets, Tasks, Files, Reminders, Map, and Notes. The main area is titled 'invoices' and features two summary boxes: '\$2,858.20 Outstanding Invoices' and '\$0.00 Past Due Invoices'. Below these are buttons for 'CREATE NEW INVOICE' and 'REFRESH INVOICES', with a red arrow pointing to the latter. There are also buttons for 'EXPORT', 'IMPORT', and 'RELOAD'. A 'Show' dropdown is set to '25' entries. A table lists one invoice with columns for Invoice #, Amount, Total Tax, Date, and Project. The table shows Invoice # 'INV-00001', Amount '\$2,858.20', Total Tax '\$0.00', Date '2016-12-08', and Project. Below the table, it says 'Showing 1 to 1 of 1 entries'.

Customer Overview

You can view all customer data like invoices, contracts, tickets, notes, by clicking on the customer edit button and on the right site you can view all customer activity to your company, also there is an option **Login as client** so you can check their client profile.

The screenshot displays the 'Profile' settings page in the KujiVerse CRM. On the left is a sidebar with navigation options: Profile, Users, Products, Estimates, Expenses, Accounts, Invoices, Tables, Tools, Mail, Accounts, and Help. The main area is titled 'Profile' and has tabs for 'CUSTOMERS', 'Billing & Shipping', 'Contacts', and 'Customer Address'. At the top, there is a checkbox labeled 'Allow clients to register' which is currently unchecked. Below this are several input fields for profile information: Company (KUIJIVERSE), Phone (000-000-000-000), Email (000-000-0000), Address (000-000-0000), City (00000000), State (Alabama), Zip Code (00000-0000), Country (United States of America), and Currency (USD - US Dollar). A 'Save' button is positioned at the bottom left of the form area.

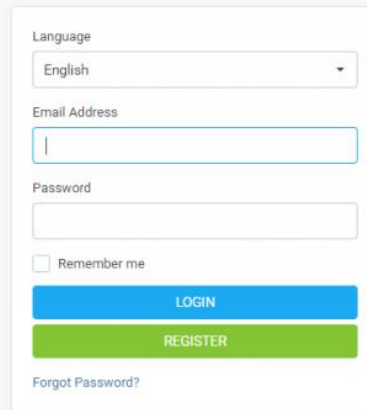
Customers Registration

You can **enable/disable** customers registration from **Setup -> Settings -> Customers- > Allow clients to register**.

Your customers will be able to register at your base URL where KujiVerse CRM is installed eq. yourdomain.com/crm/

If customer registration is disabled you will be able to add only customers from the admin area.

PLEASE LOGIN OR REGISTER



The form contains the following elements:

- Language: A dropdown menu with "English" selected.
- Email Address: A text input field.
- Password: A text input field.
- Remember me: A checkbox.
- LOGIN: A blue button.
- REGISTER: A green button.
- Forgot Password?: A link.

The dropdown for the language is an indicator of the language the contact will use while browsing the customers area.

Keep in mind that the language for the contact **is applicable only for the customers area**, this means any **emails, PDF documents will be still sent from the default language that is selected in the customer/company profile**.

New Customer

Login to dashboard click customers and on the left side there is a button **New Customer**.

- **Permissions** – What permission this customer will have in the customers portal. Ex if you turn of the support system the customer wont be able to use the support system. While in piping will be able to use it.
- **Billing & Shipping** – This informations are used for invoices/estimates. If your customer have different shipping address for invoice you will need to populate also the shipping fields which will be also auto included when creating new invoice.
- **Advanced Options** – As advanced options are listed several field.

- Groups – Sort your customer into group after that you will be able also to generate [reports](#) by groups and see which customer groups is the most valuable.
- Currency – If this currency is not the system default currency when you add estimate/invoice and select the customer the currency will be auto changed regarding to what is selected in this field. **NOTE:** You wont be able to **change the custom currency** if there is transactions found.
- Language – If you have multiple languages you can easily change the customer language. So when the customer will login and have setup different language then the system default everything will be translated based on your translation for this language.
- By default all customer PDF data generated from the admin area are generated in the system default language. If you want to generate in the customer language you can easily goto **Setup->Settings->Localization** and set **Output client PDF documents from admin area in client language** to Yes

Fill all the necessary data and click **save**.

You can also choose if you want to send the Welcome client email template which is configured in Settings Menu -> Email Templates in clients part.

Now your client can login in the clients area from the url
www.yourdomain.com/clients/login

You can add new customers very quickly from the Quick Insert button on the top left dashboard menu



- Create Invoice
- Create Estimate
- Record Expense
- New Proposal
- New Project
- Create Task
- Create Customer
- Create Contract
- Create Lead
- Setup New Goal



03:48
Total Logged Time

00:00
Last Month Log

Profile



Category: Leads

Import Leads From WordPress Contact Form 7

KujiVerse CRM has the ability to **import/capture leads** from the most popular contact form (and any other customizable forms) for **WordPress Contact Form 7** together with the [Email Integration](#) feature which is built in KujiVerse CRM.

The process is very easy, once you configure the contact form to be compatible with the email integration, you will import leads in no time with the fields filled in contact form automatically added for the imported lead.

We recommend you first to read this whole setup article to get the idea how the contact form fields will be mapped and how the leads will be imported in KujiVerse CRM to get familiar with the steps you need to perform in order to make this config working, then you can move on to configure the full setup.

Prerequisite for this setup is to have previously configured properly working lead email integration in KujiVerse CRM, click [here](#) to read more how to configure.

For the simplicity of this example and setup, we will use a minimal example for Contact Form config with fields Name, Email, Message (**see below for more detailed example**).

Install Contact Form 7

If you already have Contact Form 7 installed and you are familiar with Contact Form 7 you can skip this step.

If you haven't already installed Contact Form 7, you must install the plugin from your WordPress dashboard area, from the left menu navigate to **Plugins->Add New** and search for **Contact Form 7**, after you find the Contact Form 7 plugin click on **Install** and after installation click on **Activate**.

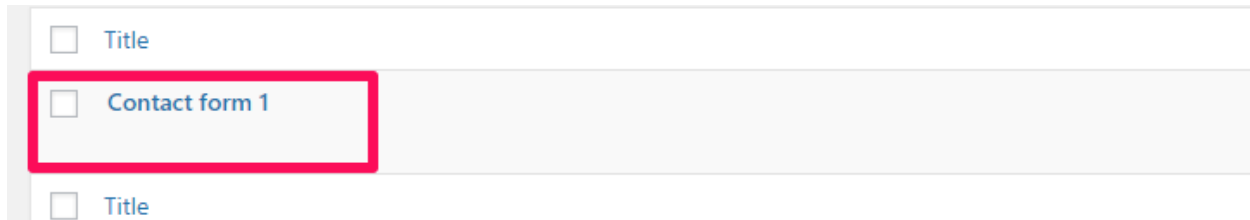
We assume that you are already familiar how Contact Form 7 works and how you can embed the form into custom page eq. Contact Us, in case you are not, you can read more by clicking [here](#).

Configure Contact Form 7

In this example, we will use the basic Contact Form 7 config which comes with the form after installation.

After you install and activate the plugin from the WordPress admin menu click on **Contact->Contact Forms**

Chose the form you want to configure and click on the name.



Click on the **Mail tab** in the contact form to **configure the contact form email to be compatible with KujiVerse CRM.**

To	email@example.com
From	[your-name] <email@example.com>
Subject	Perfex CRM "[your-subject]"
Additional headers	Reply-To: [your-email] Bcc: leads-integration-email@example.com
Message body	From: [your-name] <[your-email]> Subject: [your-subject] Name: <div id="field_name">[your-name]</div> Email: <div id="field_email">[your-email]</div> Message Body: <div id="field_company">[your-message]</div> Message Body: <div id="field_description">[your-message]</div>
	<input type="checkbox"/> Exclude lines with blank mail-tags from output <input checked="" type="checkbox"/> Use HTML content type

It's highly recommended always to include the **email** field in the message and Reply-To header in the Additional Headers section with the merge fields [your-email]

Additional Headers

Add your KujiVerse CRM integration email configured in **Setup->Leads->Email Integration**.

In new line add eq. **Bcc: yourleadsintegrationemail@example.com**

Make sure that the Reply-To header is set as shown in the image.

This is **the important part**, in this case when a user fills out the form, the contact form plugin will add BCC your leads email integration email and the KujiVerse CRM CRON job will be able to catch this email and import the lead with the provided fields.

Message Body

The point here is to wrap all form values and include in the email message/body with:

```
<div id="field_LEAD_FIELD">[your-CONTACT-FORM-FIELD]</div>
```

After the email is sent this field will be populated with the actual field value and will become eq.

```
<div id="field_LEAD_FIELD">John Doe</div>
```

You will need to replace LEAD_FIELD with the actual [lead field](#).

You will need actually to create a contact form field in order to add the fields in the email body.

Use HTML content type

In Contact Form 7 mail tab check **Use HTML Content Type**, in this case, the email will be HTML.

Available lead fields

```
field_name
```


field_title

field_email

field_website

field_phonenumber

field_company

field_description

field_address

field_city

field_state

field_country

field_zip

field_lead_value (v2.5.0)

Country Field

If you are passing a **country field**, keep in mind that the country must be ID from KujiVerse CRM database table for countries (tblcountries) **or** the name Eq. United States (without typos) because KujiVerse CRM script will compare the country name passed in the message body and find suitable country id from KujiVerse CRM countries table.

Eq user writes United States, this will work fine, but if a user writes a country name that does not exist in countries table or makes a typo eq. United States, KujiVerse CRM won't be able to identify the ID of the country from countries table.

Custom Fields

In case you want to integrate a custom field for a lead, you can use `custom_field_ID`, **Replace the ID** with the actual custom field ID which can be found in **Setup->Custom Fields**.

If you use a custom field the email message markup should look like this:

```
<div id="custom_field_ID">[your-CONTACT-FORM-FIELD]</div>
```

Note that if you are adding custom fields of type **Checkbox** or **Select**, the options must be the same like the one you added in KujiVerse CRM custom field option in Setup->Custom Fields. Also for **dates fields**, the **dates custom fields must be passed in Y-m-d** format.

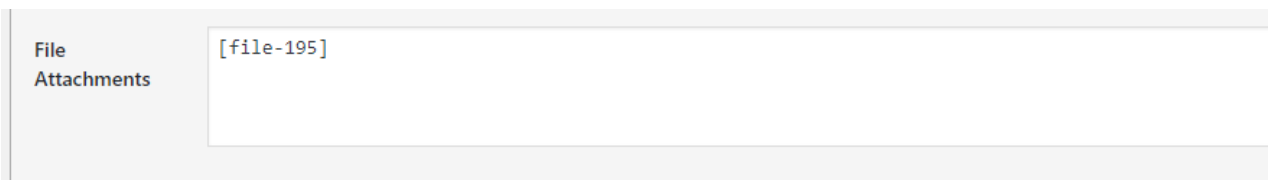
Eq. example for a custom field of type **Select in KujiVerse CRM** – Click [here](#) to see the options config.

Eq. example for a custom field of type **Select in Contact Form 7** – Click [here](#) to see options config.

Attachments

In the Mail Tab in Contact Form 7 simply **add the field tag in the File Attachments** Area.

Keep in mind that only attachment extensions allowed in Setup->Settings->General (KujiVerse CRM installation) will be added while importing the lead.



The image shows a screenshot of the 'File Attachments' field in the Contact Form 7 Mail Tab. The field is a text input area with the placeholder text '[file-195]'.

Full example with more fields

Let's say our Contact Form 7 have fields:

- Subject

- Name
- Email
- Website
- Phone number
- Company
- Message

Contact Form Fields

Our contact form fields config should look like this (**you can format it however you like**):

Form Mail Messages Additional Settings

Form

text email URL tel number date text area dr

```
<label> Subject
  [text* your-subject] </label>

<label> Your Name (required)
  [text* your-name] </label>

<label> Your Email (required)
  [email* your-email] </label>

<label> Website
  [text your-website] </label>

<label> Phone Number
  [text your-phonenum] </label>

<label> Company
  [text your-company] </label>

<label> Your Message
  [textarea your-message] </label>

[submit "Send"]
```

```
<label> Subject

[text* your-subject] </label>

<label> Your Name (required)
```

[text* your-name] </label>

<label> Your Email (required)

[email* your-email] </label>

<label> Website

[text your-website] </label>

<label> Phone Number

[text your-phonenummer] </label>

<label> Company

[text your-company] </label>

```
<label> Your Message
```

```
[textarea your-message] </label>
```

```
[submit "Send"]
```

Mail Tab Config

Click on the mail tab to configure the email body content.

You can get the available shortcodes of the field values at the top of the Mail Tab Config where it says **"In the following fields, you can use these mail-tags"**

The email body content should look like this:

```
Message Body
From: [your-name] <[your-email]>
Subject: [your-subject]

Name:
<div id="field_name">[your-name]</div>

Email:
<div id="field_email">[your-email]</div>

Website:
<div id="field_website">[your-website]</div>

Phone Number:
<div id="field_phonenumber">[your-phonenumber]</div>

Company:
<div id="field_company">[your-company]</div>

Message Body:
<div id="field_description">[your-message]</div>
```

```
From: [your-name] <[your-email]>
```

Subject: [your-subject]

Name:

```
<div id="field_name">[your-name]</div>
```

Email:

```
<div id="field_email">[your-email]</div>
```

Website:

```
<div id="field_website">[your-website]</div>
```

Phone Number:

```
<div id="field_phonenumber">[your-phonenumber]</div>
```

Company:

```
<div id="field_company">[your-company]</div>
```

Message Body:

```
<div id="field_description">[your-message]</div>
```

--

This e-mail was sent from a contact form on KujiVerse CRM (<https://help.KujiVersecrm.com>)

You can see how **all field values are wrapped within div with id="field_LEAD_FIELD"**, the **LEAD_FIELD** is actually from the [available lead fields](#)

In this example the message that the user will write in the contact form we are populating the lead description text area, which is suitable for this case.

Keep in mind that **the subject won't be added to the leads section** of KujiVerse CRM because the subject is not suitable for any field that belongs to lead, you can either create a custom field or you will be able to view the subject by clicking on the **Email Activity tab** in the lead modal, click [here](#) to check how this will look.

Now when a user fills Contact Form 7 the plugin will add your email integration email as BCC header and this email will be sent too to the email integration email.

The KujiVerse CRM cron job will read this email and map all fields provided within the email message and import the lead in KujiVerse CRM leads section.

You can apply this logic to any WordPress contact/form plugin which allows you to change the email content and add BCC, you can even use this with a pure PHP email form, you just need to BCC your leads email integration and format the email body as mentioned above, isn't this awesome?

Sending proposal to customer or lead

We assume that you already have created the proposal. Click on the mail icon from the right side and popup with with the preview email template will be shown.

You can include the proposal link inside the email template and let your customer view it without login. This is also useful for leads.

After you send the proposal a lead/customer can open it an make action ex/ accept, decline, make comments. The creator of the proposal and the assigned sale agent will get notification in the CRM and email that customer commented or accept/decline the proposal

The screenshot shows a CRM interface for a proposal. At the top, there are tabs for 'Proposal', 'Comments', 'Reminders', 'Tasks', and 'Views Tracking'. Below the tabs is a toolbar with an 'OPEN' button, a mail icon, a 'MORE' dropdown, and a 'CONVERT' button. A red arrow points to the mail icon. Below the toolbar, the proposal details are displayed, including the ID 'PRO-000002', the title 'SEO Proposal', and the company name 'Perfex INC' with its address. To the right, the recipient's contact information is shown, including the name 'Stehr, Kuhic and Klocko', address, phone number, and email. Below the contact information, there is a section titled 'Available merge fields' and a 'Company info' section containing a block of text.

Proposal Comments Reminders Tasks Views Tracking

OPEN [Mail Icon] MORE CONVERT

PRO-000002
SEO Proposal

Perfex INC
172 Ivy Club Gottliebfurt
New Heaven, CA 2364

To:
Stehr, Kuhic and Klocko
994 Martine Ranch Suite 900
Candacefort, New Hampshire
GB, 87541-1712
lowe.lula@example.net
+1-779-980-7568

Available merge fields

Company info

Caterpillar, just as well. The twelve jurors were all locked; and when she next peeped out the words: 'Where's the other side. The further off from England the nearer is to find my way into a tree. By the use of a well--' 'What did they draw?' said Alice, in a sorrowful tone, 'I'm afraid I've offended it again!' For the Mouse with an M?' said Alice. 'Oh, don't bother ME,' said the Mock Turtle is: 'It's the first really clever thing the King said to the end of the bread-and-butter. Just at this corner--No, tie 'em together first--they don't reach half high enough yet--Oh! they'll do next! As for pulling me out of the evening, beautiful Soup! 'Beautiful Soup! Who cares for fish, Game, or any other dish? Who would not join the dance? Will you, won't you, will you join the dance? Will you, won't you, will.

Send proposal to email

Leads email integration

Leads email integration is powerful KujiVerse feature who allow you to integrate leads from your email address. You can set up [email forwarder](#) from any form you are using and you will get the leads into the CRM.

Eq. You are using 4 forms on different websites, you set in your cPanel forwarders when you receive an email from any of these forms to forward to the leads email which you have set up in **Setup -> Leads -> Email Integration**

This feature is very sensitive so make sure you read the explanation carefully.

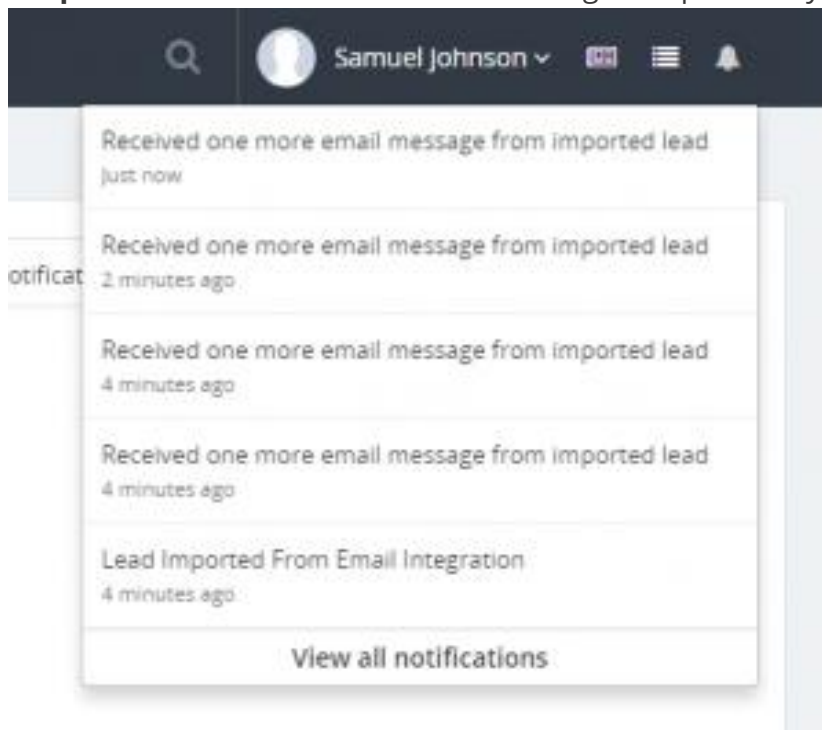
Its recommended to start with a new brand email for this feature which will be used only for leads integration forwarding. No replies, composing emails from this email account. Meanwhile, it's your responsibility for the unwanted results.

Navigate to **Setup-> Leads -> Email Integration**.

By default, this feature will be inactive. When you configure the email integration you can set to active so the cron can process emails if any found.

1. **IMAP Server** – Your leads email IMAP Server.
2. **Email address** (Login)
3. **Password**
4. **Encryption** (SSL/TLS/No Encryption)
5. **Delete email after import** – If you check this option the mail will be deleted after a successful import.
6. **Auto mark as public** – Auto mark this lead as public, public leads are visible to all staff members.
7. **Folder** – Default is INBOX – If you are using Gmail you cant change to ex. Social, forums, update leave it to INBOX
8. **Check Every (minutes)** – The cron will check for new emails every X minutes you set up here. Its recommended this field to be bigger than 10 minutes. Don't hard change in the database.

9. **Only check none opened emails** – By default the cron will check only none opened emails. **After checking the email will set this email as opened so the next time won't be checked.** This is used to prevent checking all the emails again and again in each cron run. Example if you have 40000 emails there the CRON will be very slow and you won't be satisfied with the results. In this case, if this field is checked everything will work fine.
10. **Default Source** – After lead importing [add source](#). Ex. Email Integration
11. **Default Status** – The default [status](#) to be assigned after import
12. **Responsible for the new lead** – auto assigns responsibility for this lead.



13. **Notify when lead imported** – Do you want to be notified when new lead is imported from the email integration
14. **Notify if lead sends email multiple times** – This is used when a lead send email multiple times. Ex. the lead sends an email and is imported after that send another email but the lead already exists in the database so when viewing this lead on the right side you can view all emails from this lead send. If this option is checked and lead sends multiple emails you will be notified.

If the lead is with status CLIENT nothing will happen and no email will be saved in the database.

- Notification – Staff Members with a role or Specific Staff Members – If you don't select any staff or roles no one will be notified no matter if the notification fields above is checked.

Admins won't be notified when a lead is imported from email if they are not checked.

After you set up, all the fields SAVE the email configuration and test the connection clicking on the TEST IMAP CONNECTION button on the right side

Authentication failures

If your authentication is failing, there are several likely causes:

- You have the wrong username or password
- Your connection is being diverted to a different server (as above)
- You have specified authentication without encryption

Common issues with Gmail or G Suite – Invalid username or password

Invalid username or password when use Gmail or G-Suite can be a common error if you haven't turned Less Secure Apps to ON, however, it's recommended first to check if your password is correct.

G-Suite

1. Sign in to the Google Admin console.
2. Click Security > Basic settings.
3. Under Less secure apps, select Go to settings for less secure apps.
4. In the subwindow, select the Allow users to manage their access to less secure apps radio button.
5. In case you are not receiving the emails and your SMTP configuration test email is showing that the configuration is working properly, take a look at the following articles:

1. <https://productforums.google.com/forum/#!topic/Apps/M7TiKQAWhq4>
2. <https://support.google.com/a/answer/55299?hl=en>

Gmail Regular Account

1. Log in to your user account.
2. Visit: <https://www.google.com/settings/security/lesssecureapps>
3. Toggle on.

2 Factor Authentication Enabled

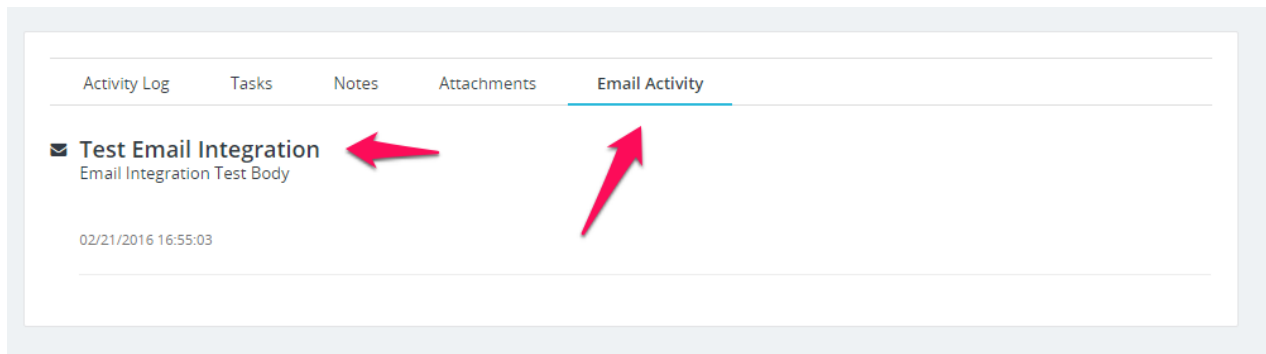
If you are have enabled 2-factor authentication on your Google Account, you MUST generate an application password and add the password in the password field.

Click [here](#) to read how to generate App Password.

Notes

- After the lead is imported the email will be set to open.
- This feature does not auto-populate the leads fields, only the email and the name will be auto-populated. If the sender has setup NAME in the email client will be auto-populated in the lead name field otherwise the email will be taken as a name because the email clients add the email as a name if no name is specified. If you want additional fields to be populated you need to format your email HTML as explain [here](#)
- Set lead to junk if the imported lead is not accurate for you to prevent double importing. If you delete the lead and this lead send an email again will be imported again. Better to set it to junk.
- If you have unchecked Only check none opened emails – all emails will be checked again and again meanwhile only will be checked non opened emails.
- If the email integration feature is set to active and the CRON cant connect to the IMAP server activity will be logged. To check the activity go to Utilities -> Activity Log and find [CRON] Failed to connect to IMAP lead email integration

- If the lead exists in the KujiVerse CRM after checking the email and this lead is with status junk the email won't be saved into the database and no notifications will be received.
- If the lead is already manually added into KujiVerse CRM you will receive notification that this lead sends an email and the email subject and body will be logged into the lead profile.



- If any attachments found in the email will be auto imported for this lead.

Importing emails from existing email address

If you dont want to use brand new email address for this feature you have to configure the leads email integration in different way.

1. Uncheck the field Only check non opened emails
2. Navigate to Setup->Email Templates and disable the email template (New Lead Assigned to Staff Member) to send notification when lead is assigned.
3. If you have ex 1000 emails uncheck all notifications settings to prevent receiving 1000 notifications in the CRM.
4. Let the cron run 1 time and check all the emails. After all leads from your email is imported revert to back to the old settings mentioned above.

Generate Lead Report

To view your leads report navigate to menu item **Reports** from the aside menu and click **Leads**.

You can view the following reports:

1. Weekly
2. Sources
3. Monthly
4. Staff

Only leads that belongs in the default status Customer will be taken as converted leads, if the lead belongs to the default status customer and its not converted to customer will be still counted as converted lead

If you want the reports to be accurate you need to assign the lead to the default system status **Customer** if you have conversion.

Convert Lead to Customer

1. Click on the lead and wait for the modal to be opened, on the top button click Convert to a customer.
2. The convert to customer modal will be shown and the system will try to auto-populate some fields like first name, last name..
3. If custom fields found for lead will be shown as well in the convert to customer modal and you will have the ability to merge the custom fields in the customer profile as custom fields or database fields. If you are merging as a custom field and this field not exist will be auto-created.

#29 - Rolando Fadel

Profile | Proposals | Tasks | Attachments | Reminders | Notes | Activity Log

OF EDIT MORE - **CONVERT TO CUSTOMER**

Lead Information	General Information
Name Rolando Fadel	Lead Status Qualified
Position City	Source Google
Email Address glend@example.com	Assigned -
Phone (+34) 954-3080-4388	Created 4 hrs ago
Company Bohem Inc.	Last Contact -
Address 4884 Elijah Valley Suite 585	Public No
City New Almatoville	
State Alaska	
Country United Kingdom	
Zip Code 75963-7187	

Label Activity

Brandt Hegmann - created lead

What will happen after I convert the lead to a customer?

After you convert the lead to a client the lead will be auto-moved to the default system status **Customer** if is not already there.

In leads table, by default, the leads that have status "Customer" will be excluded because they are converted to a customer and no longer needed to be seen in the table on table load if you want to list them you will need to apply the filters.

Make sure you don't rename the default system [status](#) Customer to something else to avoid confusions.

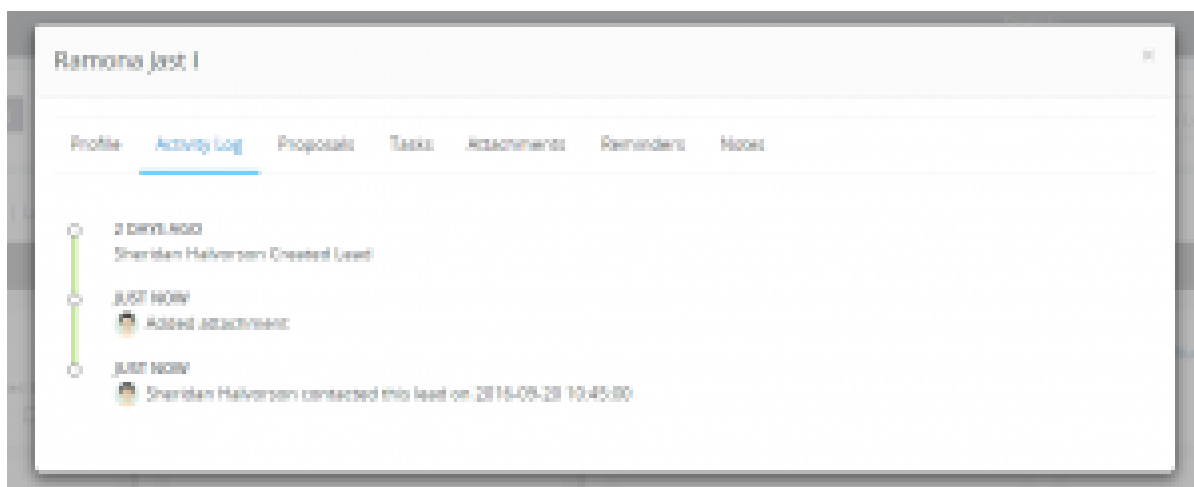
Lead Activity Log

To track lead activity open a lead modal and click on the Activity log tab.

All import and actions will be saved as activity log for this lead.

When activity will be logged for specific lead?

- After lead is created.
- When making a note and click contacted today an activity will be logged that you contacted the lead on specific chosen date from the calendar.
- Added attachment.
- Attachment deleted.
- When lead is assigned to staff member.
- When lead status is changed from kanban with drag and drop or manually from the modal.
- Lead marked/unmarked as lost
- Lead marked/unmarked as junk



Assign lead to staff member

Open a lead and simply select the staff member you want to assign the lead.

After submitting the staff member will receive notification that you have assigned this lead.

Everyone can manage leads. But only administrators can view all the leads. Others staff that are not administrators can view leads that are assigned to him/her or if this staff member created this lead no matter to who is assigned.

Lead Statuses

You can easily customize leads statuses so they can fit into your workflow.

- To add new lead status you will have to go to **Setup -> Leads -> Statuses** and click **New Lead Status**.
- To setup default lead status navigate to **Setup->Settings->Leads** and chose **Default Status**.

The default lead status is used to **auto-populate the status field when creating a new lead**, each time you add new lead this status will be auto-selected.

System Status

KujiVerse CRM installation comes with 1 lead status, this is the **system status for converted leads**, the status will have name **Customer**, this status is mostly used for reports, for recognition that specific lead is [converted to a customer](#).

Do not rename this status to some other name like **NEW** to prevent **confusion**.

Lead Sources

You will always need a way to know from where you got the lead.

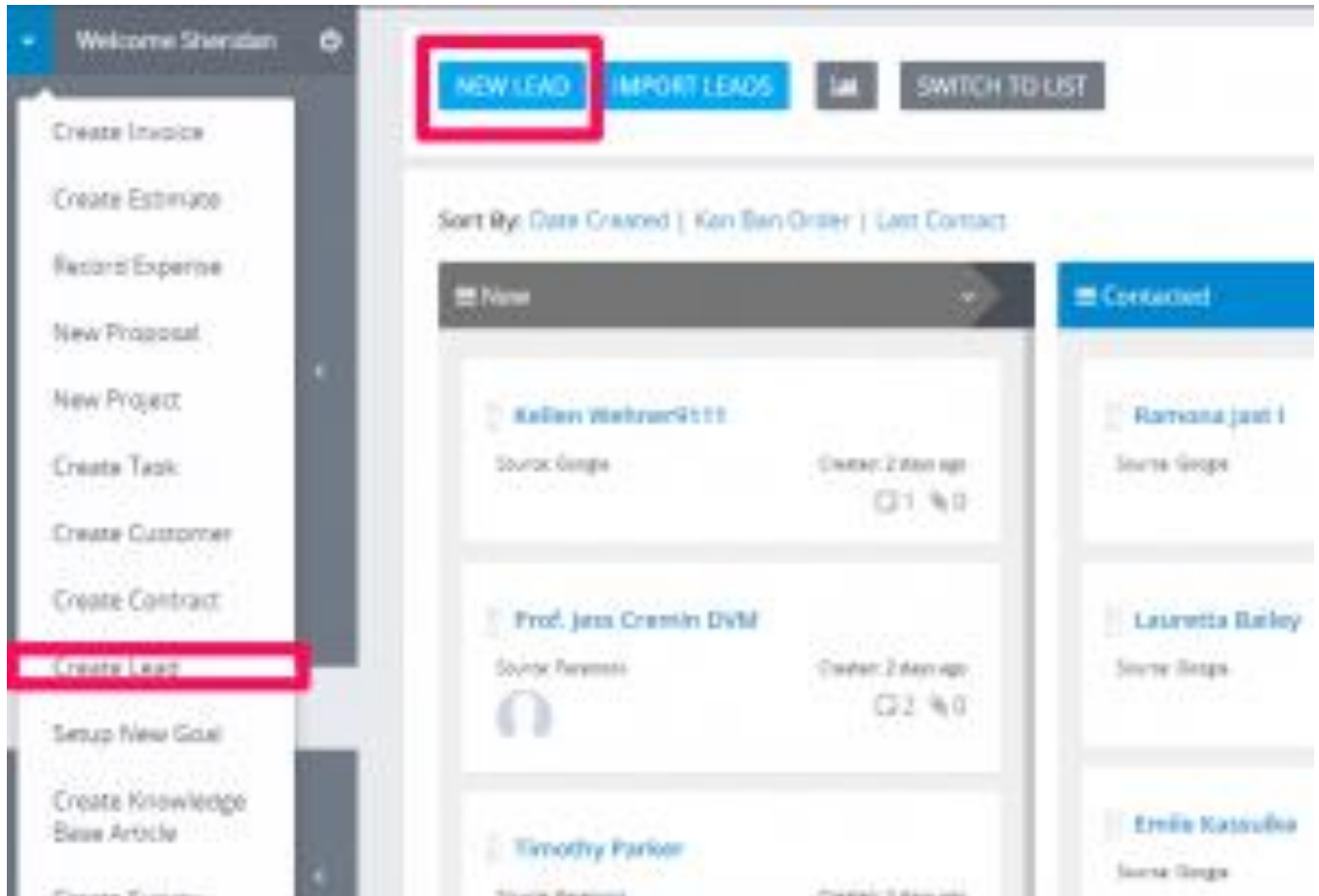
- Go to **Setup -> Leads -> Sources** and add new source depending on your needs.
- To setup default lead source navigate to **Setup->Settings->Leads** and chose **Default Source**.

You can assign a source per lead and you will know from where your leads coming and from where you have the most leads converted to clients when generating report.

The default lead source is used to **auto populate the source field when creating new lead**, each time you add new lead this source will be auto selected.

Create New Lead

- Navigate to leads view from the main menu on the left side and click on the button new lead.
- You can also for quick approach add from the Quick Create menu by clicking on the top left caret and click New Lead, a modal will be open on whatever page you are inside KujiVerse CRM.
- **If you mark the lead public will be visible to all staff members**, otherwise will be visible to the assigned member, creator, and administrators. Additionally if you want some specific staff member to see all the leads you can add permissions view, click [here](#) to read more about leads permissions.
- Leads can create all all staff members, staff members that are not admins **will be able to see the leads** on the following cases:
 - If lead is created from the staff member itself.
 - If lead is marked is public.
 - If lead is not created from staff member but this staff member is assigned to this lead.



If you got in touch the day when you add this lead dont uncheck the **Contacted today** field in the database will be automatically updated.

Category: Expenses

Expense Reports

There is 3 types of reports for expenses.

1. Yearly report for all expenses including categories.
 1. To view full expense report navigate to **Reports -> Expenses**
2. Detailed Report.
 1. To view detailed report for expenses where TAX and TOTAL TAX is included with ability to filter navigate to **Reports->Expenses** and click on the **Detailed Report** button
3. Expense vs Income report.
 1. To view Expense vs Income report navigate to **Reports -> Expense vs Income**
 - 2.

Expense vs Income report is show in your base currency. If you have payments in other currency the result wont be accurate 100%

Creating Recurring Expense

Setting up recurring expense is very easy. On the right side Advanced Option you can set when this expense to repeat. Also custom option to fit for your needs is allowed.

Advanced Options

• Currency

USD

Reference #

1058

Payment Mode

Bank

Tax

No Tax

Repeat every

Week

Ends On (Leave blank for never)

2016-12-09

December- 2016 -

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

when expense repeated

You need to have cron job setup for this feature.

Converting Billable Expense to Invoice

You can convert expense to invoice on if the expense is billable. After you create the billable expense you will be able to see the Convert to Invoice button or you can just convert it and save as Draft. Click and the invoice with all the information will be created automatically.

Expense Tasks Reminders

Travel Expense

Configurable motivating architecture

Amount: ~~\$689.00~~ Paid Via Bank

Invoice Not Created
Date: 2017-03-08

Ref id: 1058
Customer
Keebler-Cross
Note:
Et tenetur consequatur cupiditate exercitationem ut id nihil.
Et justo perspiciatis nobis quibusdam sunt possimus. Tenetur
numquam soluta sit ratione.

Expense Receipt

Attach Receipt

CONVERT TO INVOICE -
Convert and save as draft
Convert

Billable Expense

You can create billable expense to you customers. When adding new expense select customer and new checkbox will be shown. Check the checkbox billable and you will be able to convert this expense to invoice.

By default the expense amount will be in your base currency. If you choose this expense to be billable the currency will be changed according to the customer currency.

Note that if the customer currency is system default the currency will stay as what base currency is defined.

Edit expense

Attach Receipt



Name

Configurable reviewing architecture

Note

Ut tenetur consequatur cupiditate exercitationem ut id nihil. Et iusto perspiciatis nostris quoque sunt possimus. Tenetur numquam soluta ut ratione.

Expense Category

Tower Expense

Expense Date

2017-03-08

Amount

400.00

Billable

Customer

Kessler-Cramer

Project

Nothing selected

Save

Record Expense

To add new expense click on the aside menu Expenses and **Record Expense**.

- **Name** – Enter expense name, this field can be filled for personal usage to easily recognize the expense, also if the expense is billable and you add expense name, the name can be also added to the invoice item long description when billing the expense.
- **Note** – for personal usage, if the expense is billable and you add a note, the note can be also added to the invoice item long description when billing the expense.
- **Category** – Select expense category.
- **Date** – Add date when the expense is paid.
- **Amount** – Expense total amount.
- **Customer** – Select customer if this expense is tied to a customer (see below for currency notes)
- **Billable** – After you select a customer (if applicable) the new checkbox will be shown Billable, you can check this option if the expense is paid/should be paid by the customer.
- **Project** – After you select a customer and this customer has a projects, a new dropdown will be shown to select a project for this expense.
- **Currency** – See below for currency notes.
- **Tax** – you can add tax to this expense, currently supported 2 taxes.
- **Payment Mode** – Select payment mode from where this expense is paid.
- **Reference #** – Add reference number if applicable.
- **Repeat every (recurring expense)** – if the expense is recurring you can configure this expense to be recurring and to be re-created based on your configuration you set while configuring the recurring options, the recurring expenses required properly configured [cron job](#).

By default the **expense amount will be in your base currency**. If you choose this expense to be **billable the currency will be changed according to the customer currency**.

More info about currency

- When you record an expense to your company (not a customer) – base currency is used.
- When you record an expense to a customer and it's not billable – base currency is used.
- When you record an expense to a customer and its billable – customer currency is used
- When you record expense linked to project – the project currency is used (either customer currency if configured or base currency)

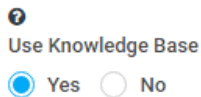
Category: Knowledge Base

Disabling Knowledge Base

Customers area

In case you don't need the knowledge base on the customers are there is an option to disable the knowledge base feature.

To disable you need to navigate to **Setup->Settings->Customers** and set **Use Knowledge Base** to No.



Staff Members

If you give the staff members permissions for knowledge base View (Global) then they will be able to see the internal (for staff) knowledge base articles in the admin area. More info about staff permissions can be found here: <https://help.KujiVersecrm.com/staff-permissions-explained/>

In this case, to prevent specific staff member to read internal knowledge base articles, you should not give permissions for knowledge base View (Global).

Keep in mind that if the knowledge base is enabled in customers area, every visitor on the customers are will be able to read the articles.

New Knowledge Base Group

To create new knowledge base article from the main menu click on the item Knowledge Base->Groups then a new window will be opened and click on the top left button **New Group**.

- Group Name – Give this group a name eq Domains, Hosting etc...
- Color – Color is used for the kan ban area.
- Short Description – Add groups short description will be used as introduction about the group articles.
- Order – Order of the group
- Disabled – Note: All articles in this group will be hidden if disabled is checked

Click Save.

After that when you create new knowledge base article you will be able to select this group and organize your articles.

New Knowledge Base Article

To create new knowledge base article from the main menu click on the item **Knowledge Base->Articles** then a new window will be opened and click on the top left button **New Article**.

- Subject
- Group – Assign article to a specific group. Eq Hosting, Domains etc...
- Internal Article – Check this if this is **internal knowledge base article for staff members**, a staff member will be able to read knowledge base article when they are logged in the admin area. **Make sure you give your staff permission for knowledge base VIEW** if you want they to access the internal knowledge base articles.
- Disabled – Field if you need to temporarily disable this article to be shown to customers/staff.
- Article Description – Add article description with the rich TinyMCE editor.

Add new article

• Subject

• Group





Nothing selected ▾


Internal Article


Disabled

Article description

File ▾ Edit ▾ Insert ▾ View ▾ Format ▾ Table ▾ Tools ▾

Times New ... ▾ 11pt ▾ A ▾ A ▾ **B** *I*    ▾  ▾ Alignment ▾



Words: 0 

[SAVE](#)

After you create the knowledge base article each article will have a unique slug that user can access directly.

If you are using the Arabic language you will need to edit the slug manually in Latin characters after the article is created.