



# Gro CRM

## Quick Start Guide

Last Update - May 11, 2019

Welcome to Gro CRM Quick Start Guide! This Guide is designed to get you up and running quickly. Learn how to download the app as well as the basics of our friendly CRM platform made just for Apple users. This guide also includes links, tips and more. Keep it handy your first few times using the platform until you get comfortable. It won't be long before you are a Gro CRM expert!

## 1. Gro CRM Editions

### 1. App Store In-App Gro CRM Editions\*

- Solo - (Allowed to purchased a single user/seat)
- Basic - (Allowed to purchased up to 10 users/seats)
- Pro - (Allowed to purchased 20 users/seats)

### 2. Gro CRM Editions\* (<https://www.grocrm.com/buy/>)

- Solo - (Allowed to purchased a single user/seat)
- Basic - (Allowed to purchased up to 25 users/seats)
- Pro - (Allowed to purchased Unlimited users/seats)

### 3. NFR & Partner Editions\* (<https://www.grocrm.com/buy/>)

- Basic - (Allowed to purchased up to 25 users/seats)
- Pro - (Allowed to purchased Unlimited users/seats)

*Note:(s) Yes! We do offer discounts for Non-Profit 501(c)(3) organizations.  
Please contact us to learn more: [sales@grocrm.com](mailto:sales@grocrm.com)*

*If you are interested in becoming a Gro CRM partner and making commission  
contact us to learn more: [sales@grocrm.com](mailto:sales@grocrm.com)*

*We do offer a free 14-day trial on our website at: <https://www.grocrm.com/trial/>  
Have your entire team test drive Gro CRM with no limits!*

*\* Feature Comparison Chart: <http://www.grocrm.com/comparison/>*

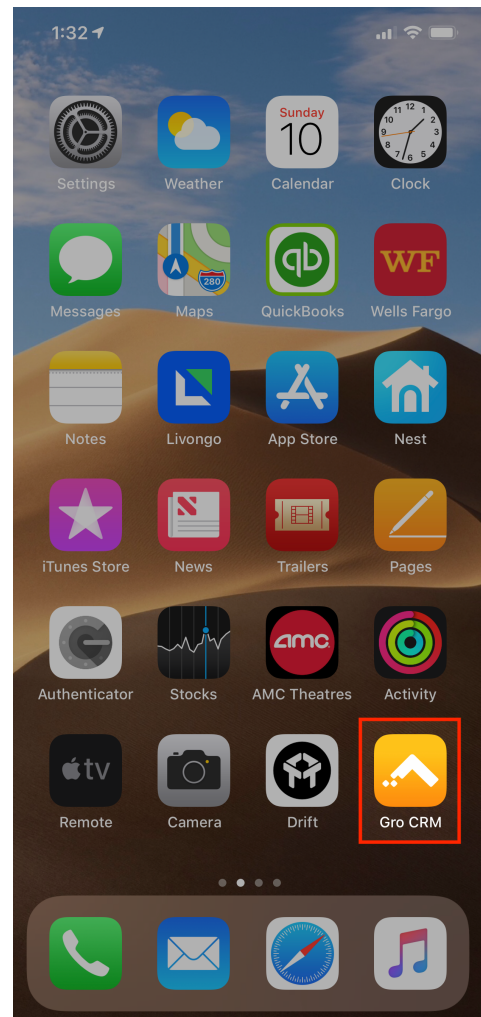
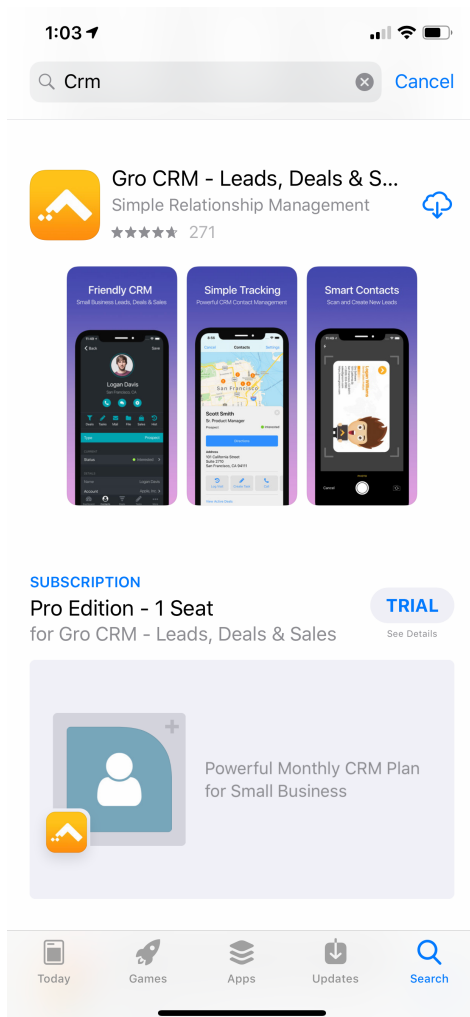
## 2. Download Gro CRM

Gro CRM is the friendly Apple based CRM that is helping people manage their leads, deals and sales. Our philosophy is that every business is precious and deserves an intelligent and beautifully designed CRM platform that will help them grow their business and customer base.

Download Gro CRM too as many Apple devices as you'd like, there are no limits. If you do not have Gro CRM downloaded, follow the download instructions below.

**To download Gro CRM to your Apple® devices:**

- Download Gro CRM for free on the Apple App Store.
- Gro CRM Download Link: <https://itunes.apple.com/us/app/gro-crm/id1150281533?ls=1&mt=8>

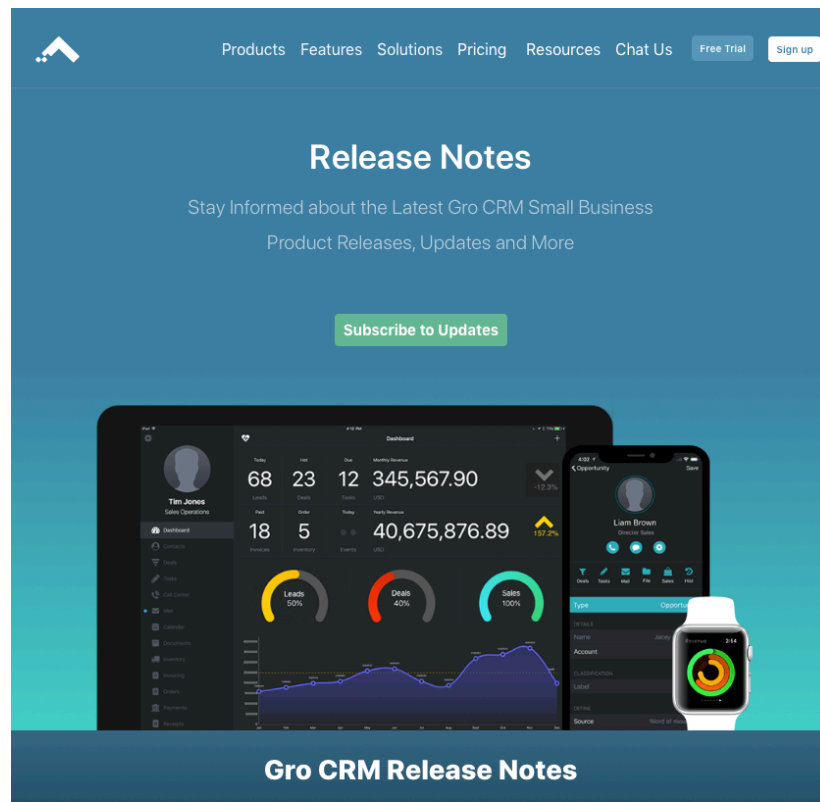




### 3. Current Release

To keep up to date with the latest version and features make sure you bookmark our "Release Notes".

- **Link:** <https://www.grocrm.com/release-notes/>



**New**

#### Gro CRM 2.5 - iOS

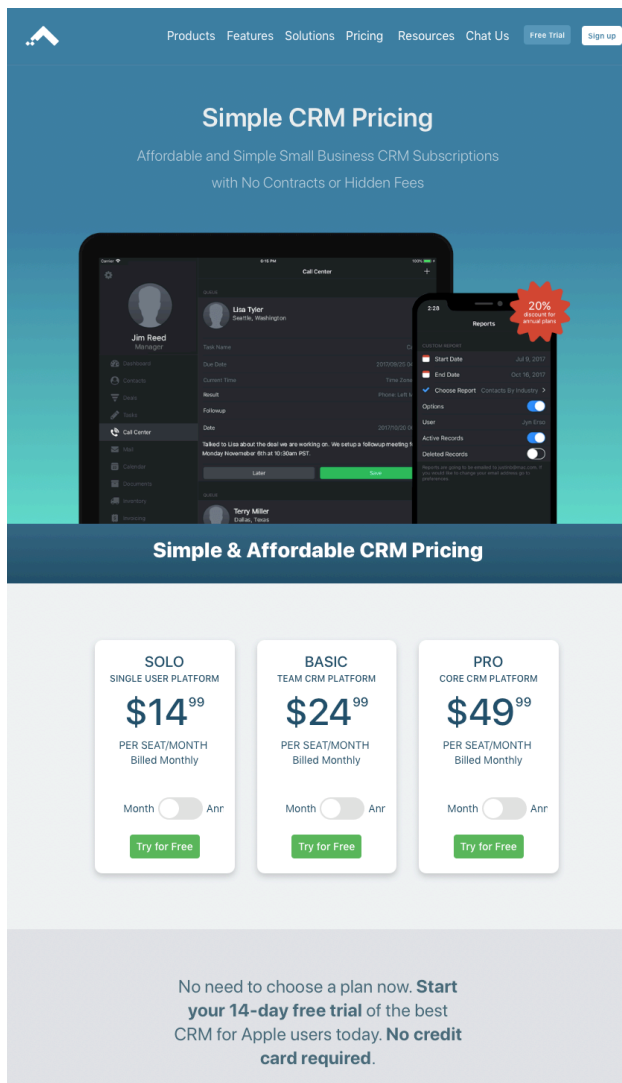
Release Date: Jan 31, 2019

- Customized Fields!!!
  - Custom "String" fields
  - Custom "Bool" fields
  - Custom "Decimal" fields
  - Custom "Integer" fields
  - Custom "Date" fields
  - Custom "Date/Time" fields
  - Custom "Time" fields
  - Custom "Email" fields
  - Custom "URL" fields
  - Custom "Phone" fields
  - Custom "List" fields
  - Custom "Multi-List" fields
- Default Custom Fields when adding Contacts
- Ability to delete Apple Contact imports
- Additional data contact export fields
- Redesigned large stickers
- Performance updates

## 4. Gro CRM Edition Pricing & Features

Our website lists all the features for our (3) different editions. This is a great reference to know what features are available for each of our edition (Solo, Basic and Pro).

- **Link:** <https://www.grocrm.com/pricing/>
- **Comparison Chart:** <http://www.grocrm.com/comparison/>



The screenshot shows the Gro CRM website's pricing page. At the top, there's a navigation bar with links to Products, Features, Solutions, Pricing, Resources, Chat Us, Free Trial, and Sign up. The main heading is "Simple CRM Pricing" with a subtext "Affordable and Simple Small Business CRM Subscriptions with No Contracts or Hidden Fees". Below this is a large image of a tablet and a smartphone displaying the CRM interface. A red starburst graphic indicates a "20% discount for annual plans". At the bottom, there are three pricing cards for SOLO, BASIC, and PRO editions, each with a "Try for Free" button. A footer message states: "No need to choose a plan now. Start your 14-day free trial of the best CRM for Apple users today. No credit card required."

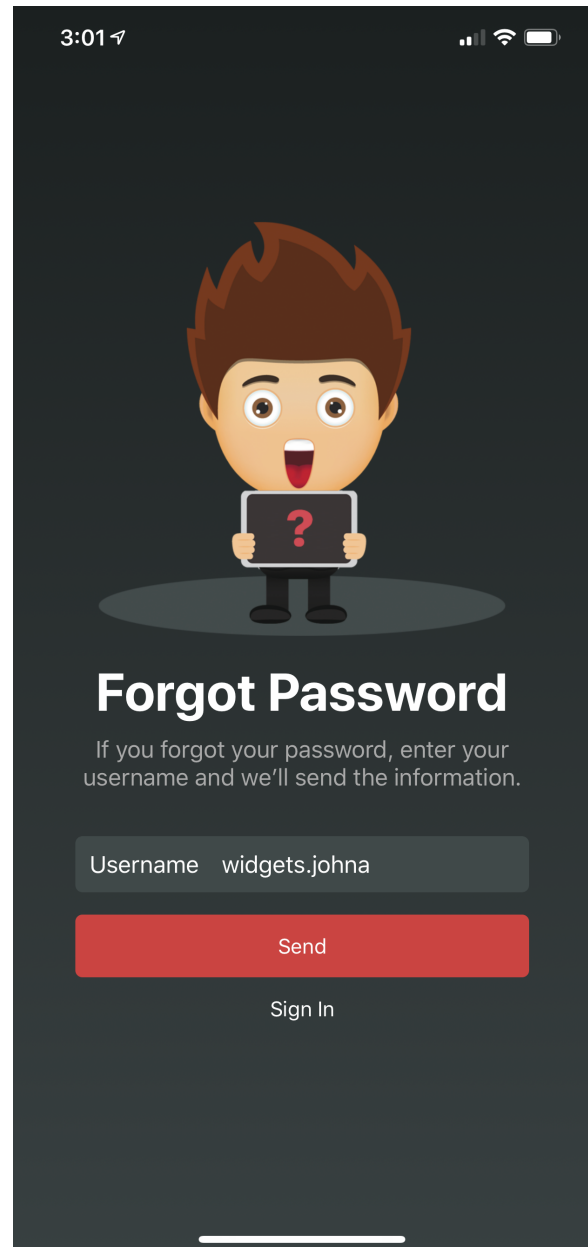
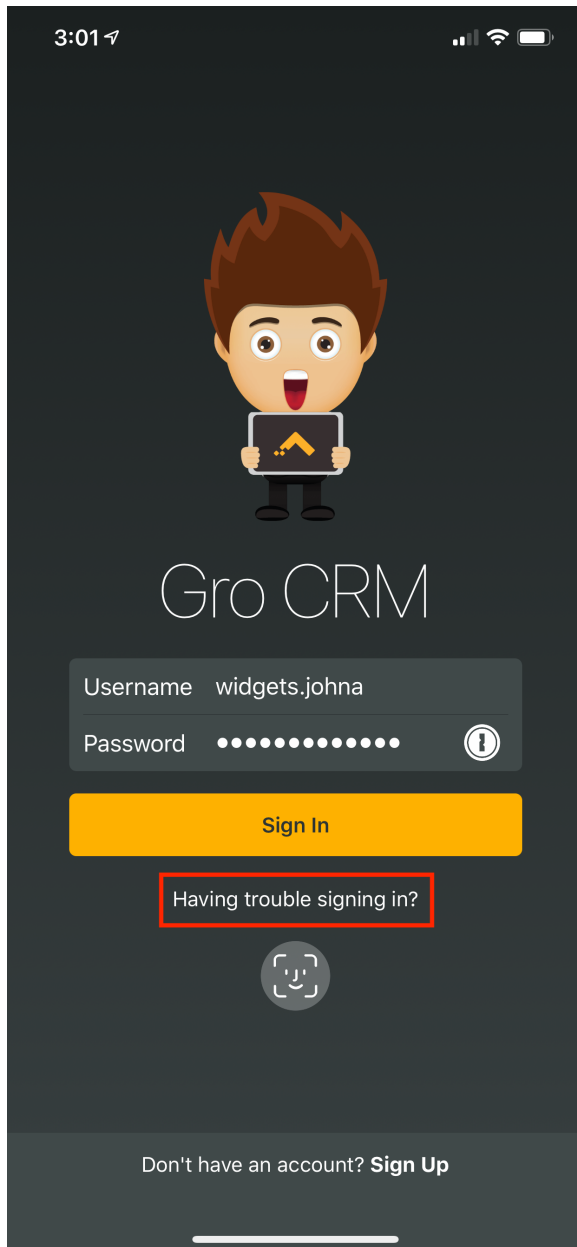
Gro CRM Editions	Solo	Basic	Pro
Seat Cost	\$14.99/mo*	\$24.99/mo*	\$49.99/mo*
Max Users	1	25	Unlimited

Features	Solo	Basic	Pro
Contacts and Accounts	2,500	50,000	Unlimited
Import Apple Contacts	✓	✓	✓
Post to Apple Calendar	✓	✓	✓
CSV Contact Importer	✓	✓	✓
Real-Time CRM Dashboard	✓	✓	✓
Deals & Opportunity Tracking	✓	✓	✓
Task Management & Tracking	✓	✓	✓
Document Management	✓	✓	✓
Calendar & Appointments	✓	✓	✓
Custom Tags	✓	✓	✓
Push Notifications	✓	✓	✓
iCloud & Gmail Email Integration	✓	✓	✓
Custom Email Templates	✓	✓	✓
Custom Fields		5	20
Contact Email Tracking	✓	✓	✓
Lead & Sales Management	✓	✓	✓
Relationship Tracking	✓	✓	✓

Simple & Affordable CRM Pricing			
<a href="#">Gro CRM Comparison Chart</a>			
Gro CRM Editions	Solo	Basic	Pro
Seat Cost	\$14.99/mo*	\$24.99/mo*	\$49.99/mo*
Max Users	1	25	Unlimited
Features			
Contacts and Accounts	2,500	50,000	Unlimited
Import Apple Contacts	✓	✓	✓
Post to Apple Calendar	✓	✓	✓
CSV Contact Importer	✓	✓	✓
Real-Time CRM Dashboard	✓	✓	✓
Deals & Opportunity Tracking	✓	✓	✓
Task Management & Tracking	✓	✓	✓
Document Management	✓	✓	✓
Calendar & Appointments	✓	✓	✓
Custom Tags	✓	✓	✓
Push Notifications	✓	✓	✓
iCloud & Gmail Email Integration	✓	✓	✓
Custom Email Templates <span>New</span>	✓	✓	✓
Custom Fields <span>New</span>		5	20
Contact Email Tracking	✓	✓	✓
Lead & Sales Management	✓	✓	✓
Relationship Tracking	✓	✓	✓

## 5. Forgot Login Password (In-App)

We do not save your Gro CRM password for your security and privacy. If you forget your password or if you would like to reset it you can do that with our “Having trouble signing in?” app feature.

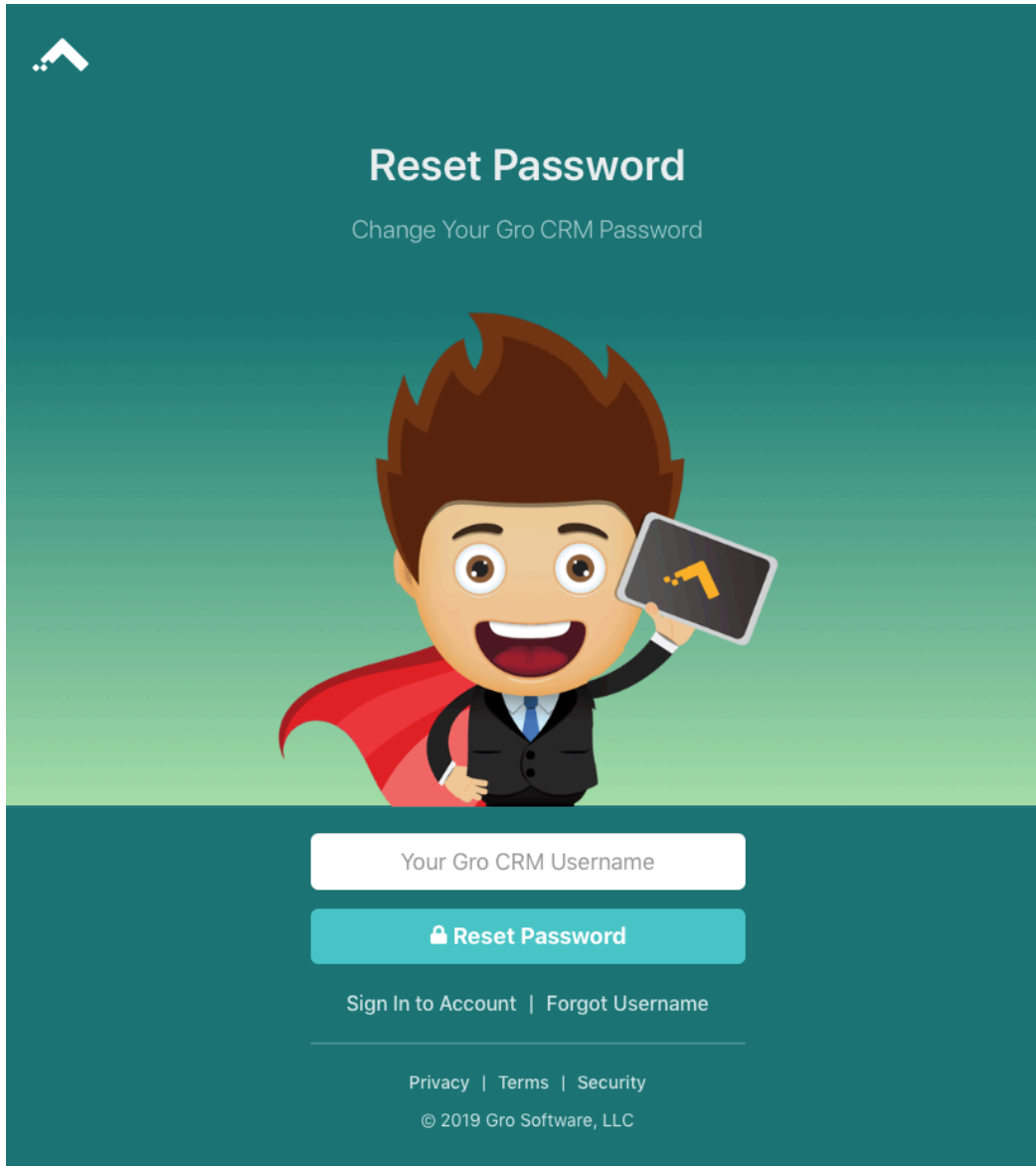


**Note:** You need to use your **Gro CRM Username (example: rogue.jyne)** to reset your password. All password reset instructions will be emailed to the “email address” you sign up up with. If you do not see the password reset email in your “Inbox”, make sure you check your “Junk” mail folder.

## Forgot Login Password (Website)

We do not save your Gro CRM password for your security and privacy. If you forget your password or if you would like to reset it you can do that with our Reset Password.

- **Link:** <https://www.grocrm.com/account/reset-password/>

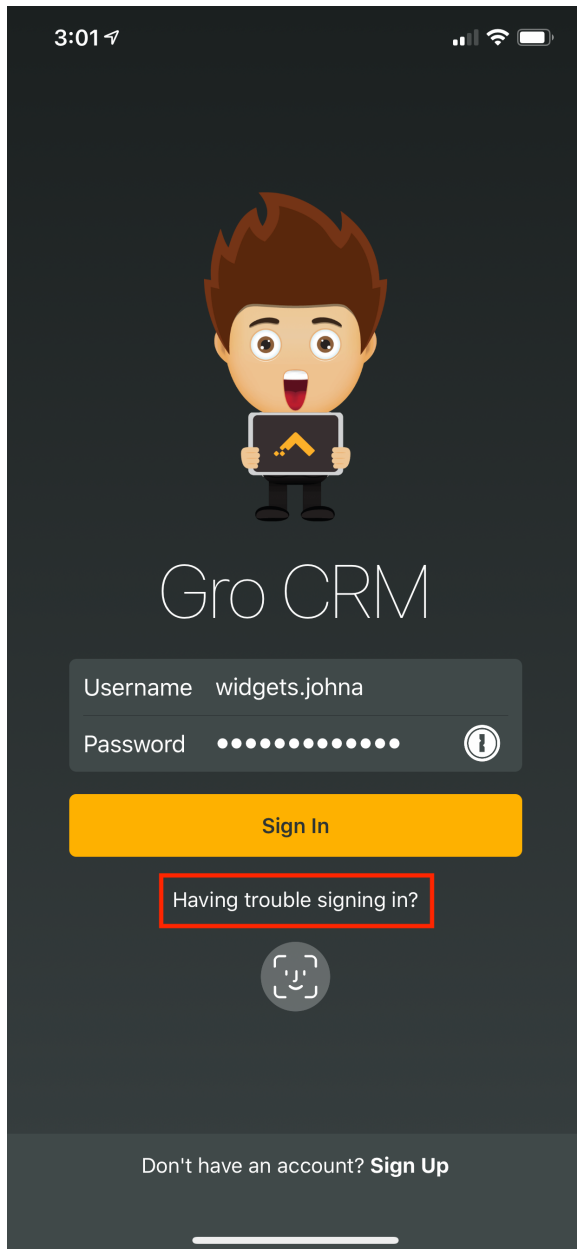
The image shows a 'Reset Password' form for Gro CRM. At the top left is a small white logo consisting of three dots and an upward-pointing arrow. The title 'Reset Password' is centered in white, with the subtitle 'Change Your Gro CRM Password' below it. In the center is a cartoon illustration of a man with brown spiky hair, wearing a black suit and a red cape, holding a tablet that displays the Gro CRM logo. Below the illustration is a white input field labeled 'Your Gro CRM Username'. Underneath that is a teal button with a white lock icon and the text 'Reset Password'. Below the button are two links: 'Sign In to Account' and 'Forgot Username'. At the bottom, there are links for 'Privacy', 'Terms', and 'Security', followed by the copyright notice '© 2019 Gro Software, LLC'.

**Note:** You need to use your **Gro CRM Username (example: rogue.jyne)** to reset your password. All password reset instructions will be emailed to the “email address” you sign up with. If you do not see the password reset email in your “Inbox”, make sure you check your “Junk” mail folder.

You are able to change your login username if you like. Just use our AMS to do this.

## 6. Forgot Login Username (In-App)

We email your Gro CRM username to you when you signup, however if forget it for some reason? Account owners can look up their usernames.



3:01

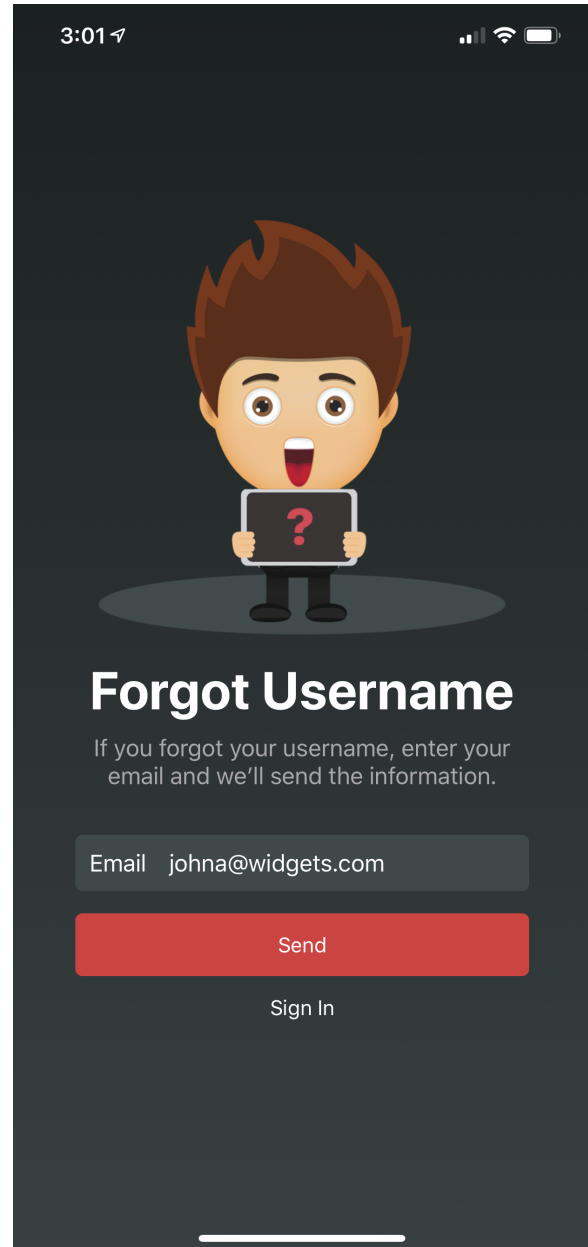
Username widgets.johna

Password ••••••••••

Sign In

Having trouble signing in?

Don't have an account? Sign Up



3:01

### Forgot Username

If you forgot your username, enter your email and we'll send the information.

Email johna@widgets.com

Send

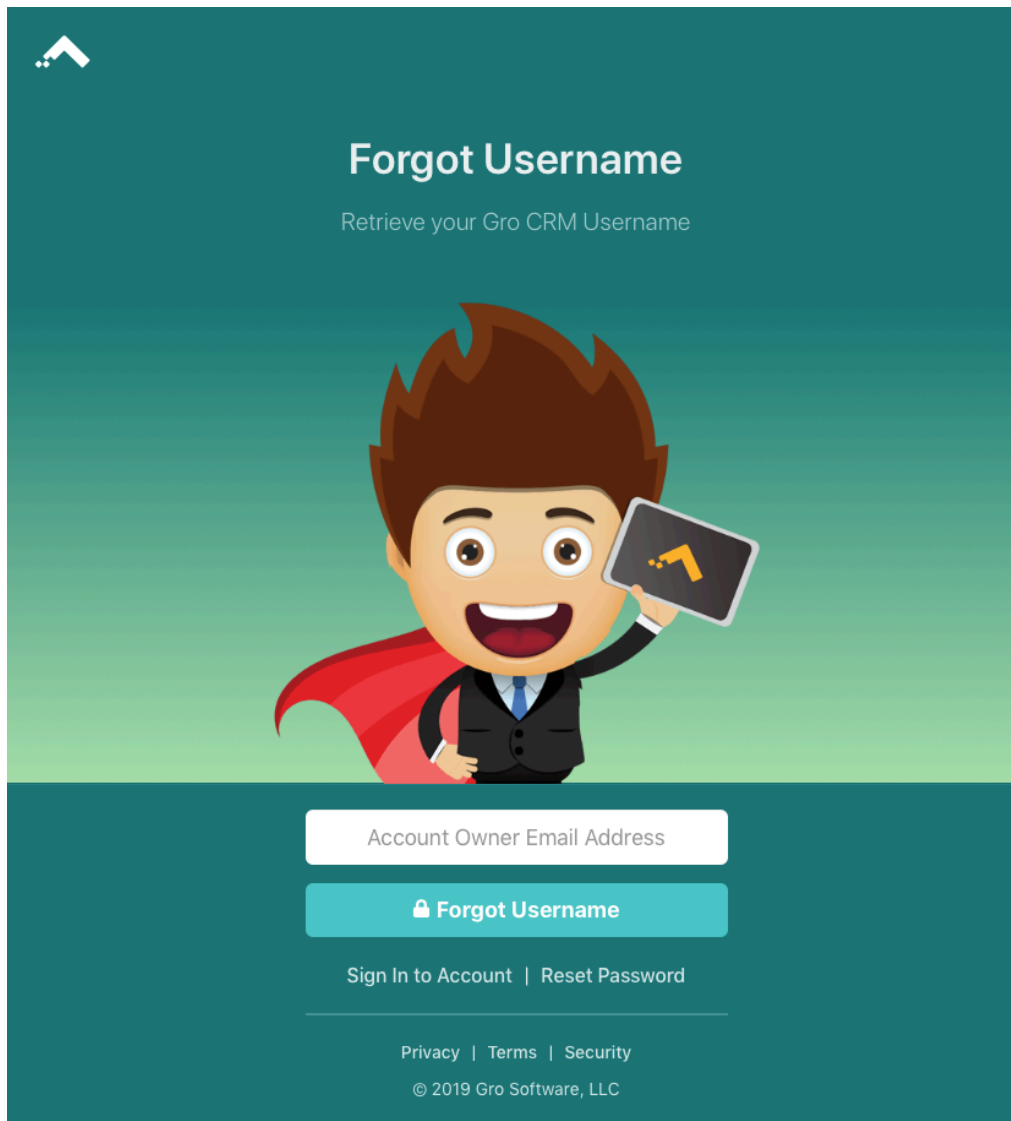
Sign In


**Note:** You need to use the email address you signup up with. Forgot Username is a feature only available to account owners (the person who originally signed up for the account).

## Forgot Login Username (Website)

We email your Gro CRM username to you when you signup, however if forget it for some reason? Account owners can look up their usernames.


- **Link:** <https://www.grocrm.com/account/forgot-username/>






## Forgot Username

Retrieve your Gro CRM Username



Account Owner Email Address

 **Forgot Username**

[Sign In to Account](#) | [Reset Password](#)

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[Privacy](#) | [Terms](#) | [Security](#)

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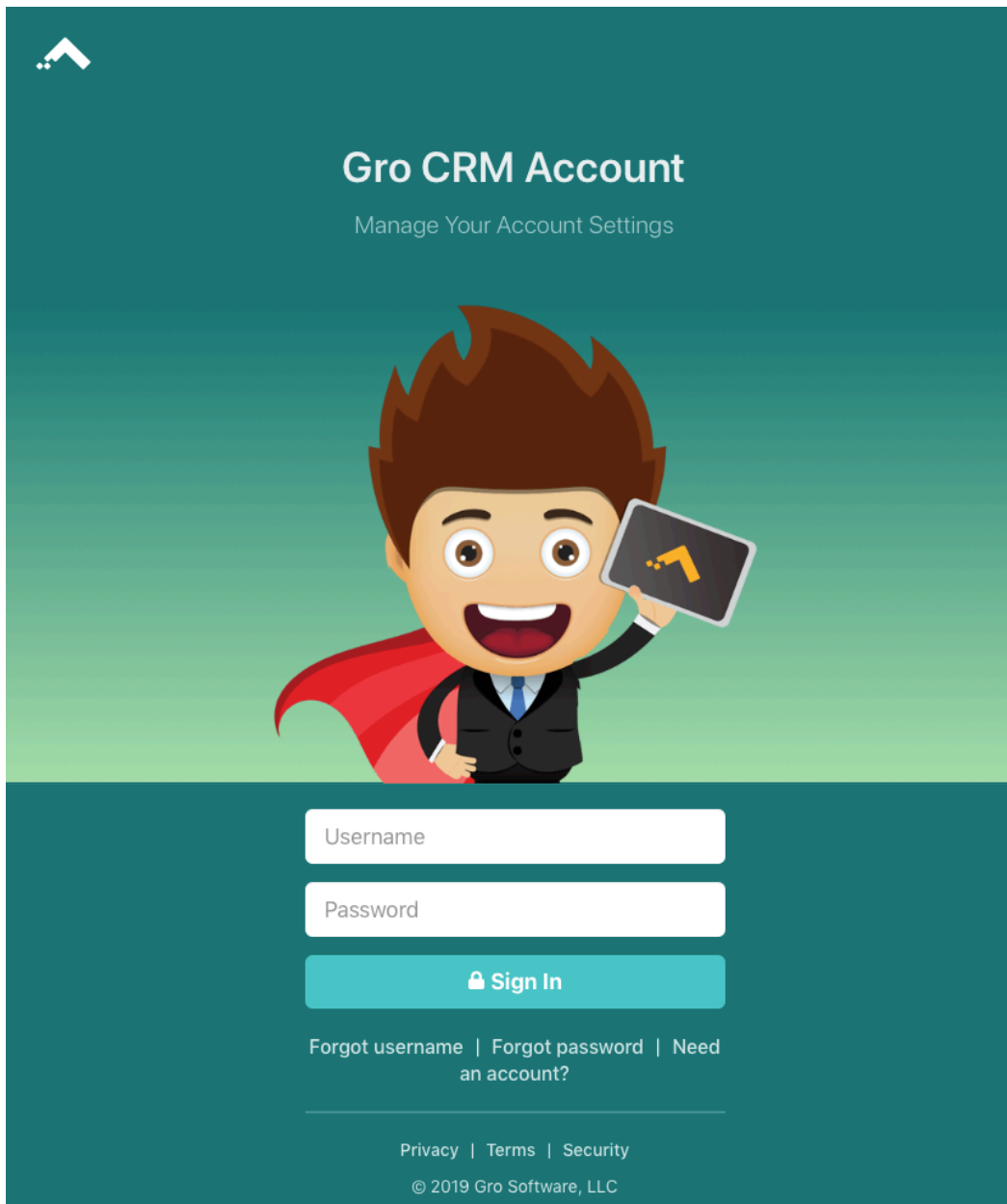
**Note:** You need to use the email address you signed up with. Forgot Username is a feature only available to account owners (the person who originally signed up for the account).



## 7. AMS (Account Management System)

The Gro CRM AMS system is where your company, team and users can manage your account, billing and more. Depending on the the type of account and access you have (App Store Solo Edition, Gro CRM Solo, Gro CRM Basic, Gro CRM Pro, NFR Edition, Partner Edition or Free trial) some of the features may not be available to you.

- **Link:** <https://www.grocrm.com/account/>




The image shows a screenshot of the Gro CRM Account Management System interface. The background is a teal gradient. At the top left is a small white logo. The main heading is "Gro CRM Account" in white, with the subtitle "Manage Your Account Settings" below it. In the center is a cartoon illustration of a man with brown hair, wearing a black suit and a red cape, holding a tablet that displays the Gro CRM logo. Below the illustration are two white input fields for "Username" and "Password". Below these is a teal button with a white lock icon and the text "Sign In". Under the button are links for "Forgot username", "Forgot password", and "Need an account?". At the bottom are links for "Privacy", "Terms", and "Security", followed by the copyright notice "© 2019 Gro Software, LLC".

Gro CRM Account

Manage Your Account Settings

Username

Password

 Sign In

[Forgot username](#) | [Forgot password](#) | [Need an account?](#)

[Privacy](#) | [Terms](#) | [Security](#)

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**Account:** <https://www.grocrm.com/account/home/>

- View your current account details
  - Gro CRM Subscription Type (Customer, Free Trial, NFR, App Store)
  - Apple In-App Subscription
  - NFR Subscription
  - Partner Subscription
- View your current seats

**Profile:**

- Manage your Account
- Manage your Username:
- Manage your Password
- Activate 2FA auth
- Import CSV (Spreadsheet Data)
- Manage current imports (CSV and Apple Contact Imports)
- Generate a API Token
- Activate Stripe Credit Card Integration

**Billing:**

- Billing History
- Billing FAQ

**Roles:**

Agent(s) are authorized by you "the account owner" to make financial decisions on behalf of your organization. Agents have the authority and power to make purchases, update your account, add seats and much more.

- Create Agents

**Partner:**

If you signed up as a partner you will receive a custom referral link where you can track how many users are signed up through your custom link. Contact us at [\*\*sales@grocrm.com\*\*](mailto:sales@grocrm.com) if you are interested in becoming a partner.

**Support:**

- Purchase support Incident ticket (Email or Phone Call Back)
- Purchase Onboard service
- Support FAQ
- Report a Bug
- Request a Feature
- Cancel Account

**Upgrade:**

- You can upgrade your account, your seats and your add-ons.

## 8. Support Options

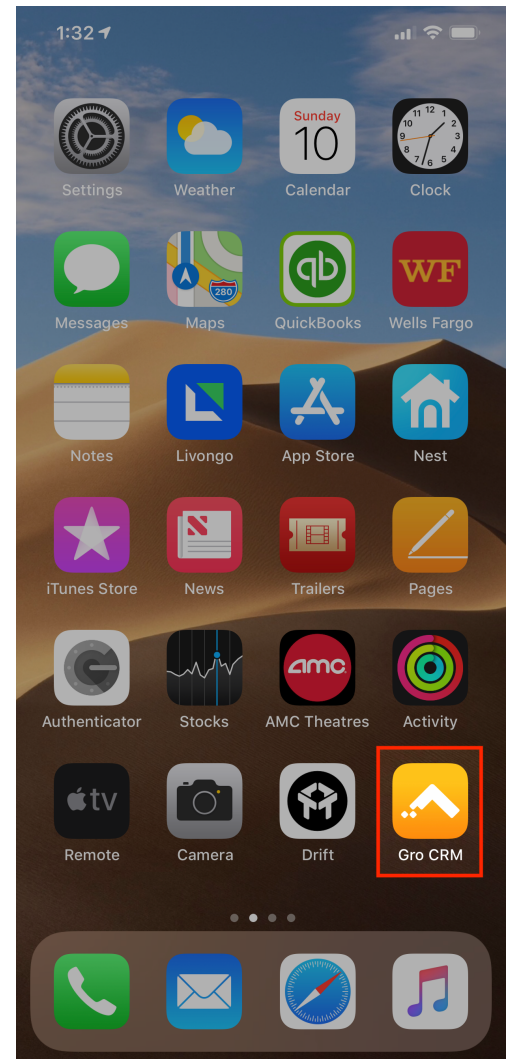
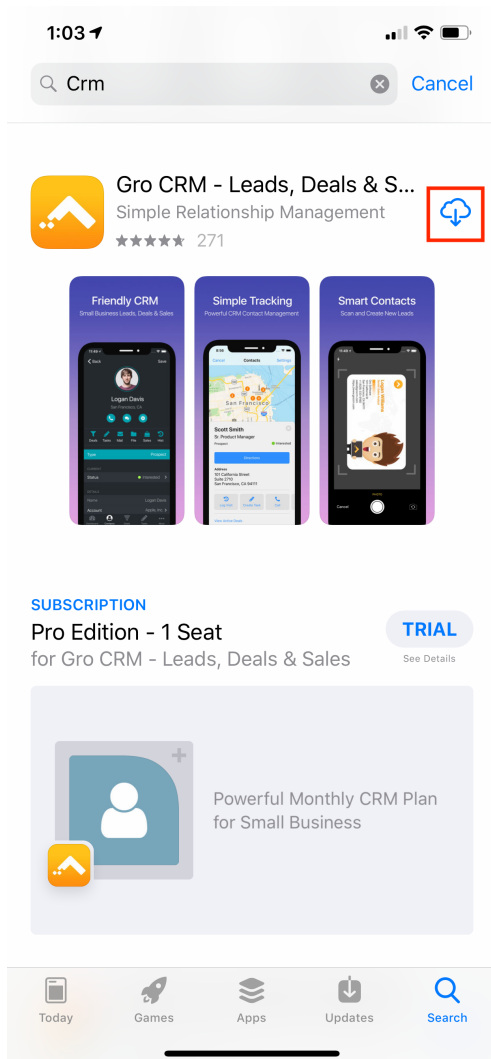
We have a few different support options for you and your team. Also makes sure you read our FAQ which we update often: <https://www.grocrm.com/support/faq/>

- **Free chat** support
  - Go to our website and chat us at: <https://www.grocrm.com>
- **Free email** support for “Trial” accounts
- **Free email** support during your first 30 days of subscription
- Paid Email support incidents
- Paid Phone call-back support incidents.
- Paid on-boarding service
- Paid data importing and cleanup (contact for quote).

*Note: We do offer a free CSV importer so you can import your data yourself. If you need help cleaning up your data contact us for a free quote.*

- **Link:** <https://www.grocrm.com/account/profile/importer/>

## 9. Download and Login with Your Apple Device



### Download and Open Gro CRM App

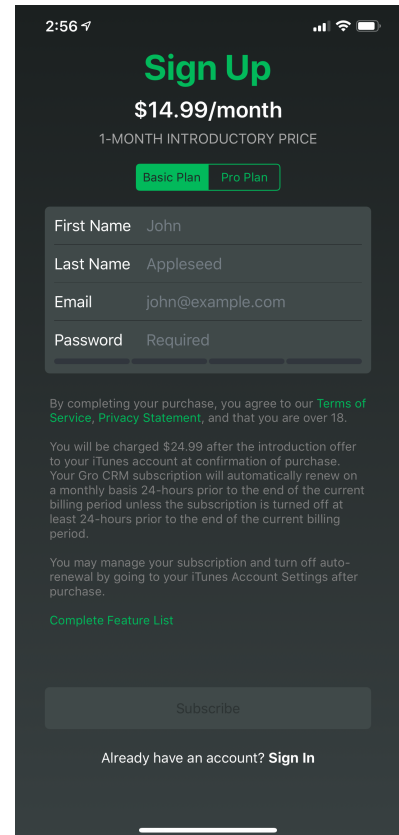
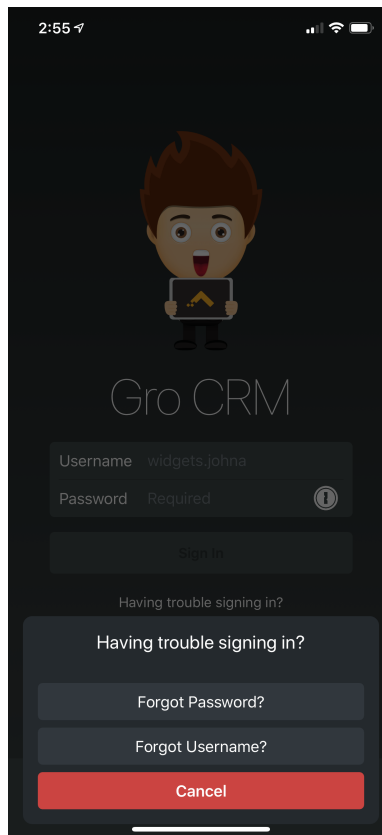
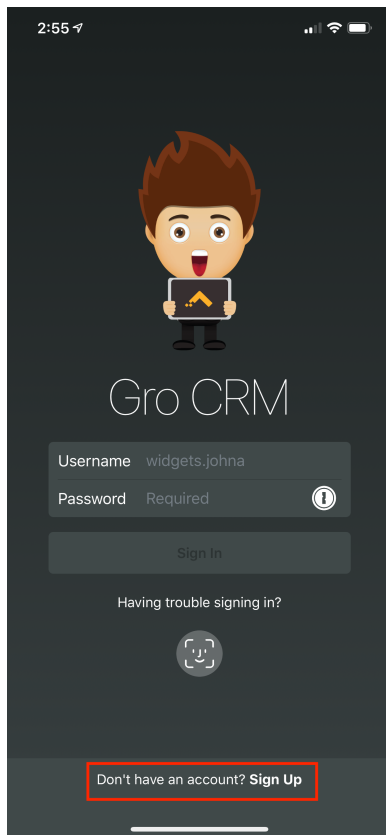
Once you download the Gro CRM app from the Apple App Store you will see the Gro CRM icon on your Apple iPhone or iPad.

Click on the icon to open up the Gro CRM app.

**Tip:** To turn on “Automatic Downloads” in iOS go to Preferences -> iTunes & App Stores and activate the “Apps”

**Note:** Make sure you have the latest version of the Gro CRM app. We recommend turning on iOS “Automatic Downloads” so you always have the latest version.


## 10. Subscription: In-App Subscription (App Store)



### In-App Subscription


Gro CRM in-app subscriptions are charged to your iTunes account and auto-renew every month unless disabled in your iTunes Account Settings at least 24 hours before the end of the current period. Once paid, a subscription is non-refundable for that period.

## 10. Subscription: Online Store

 [Products](#) [Features](#) [Solutions](#) [Pricing](#) [Resources](#) [Chat Us](#) [Free Trial](#) [Sign up](#)

### Sign Up

Subscribe to a Gro CRM Small Business Plan and Accelerate your Productivity, Leads and Sales



#### CRM Small Business Plans

#### 1 Choose Plan

The Gro CRM platform has all the tools you and your team need to grow your business with complete success.

- ✓ Plans as low as \$14.99/seat
- ✓ Individual or company plans
- ✓ Pay per month or annually
- ✓ 20% discount for annual plans
- ✓ Add seats as you grow
- ✓ on-boarding services available
- ✓ Friendly support available

Monthly Billing

Basic Subscription

2

Coupon Code

☒

Undelete Add-on

☒

Business Card Scanner Add-on

☐

Data Backup Add-on

Plan Details:

- Billing: Monthly
- Plan: Basic
- Seat Cost: 39.97 USD/seat
- Seats: (2)


### Website Subscription Signup

Signup on your website and create your account in just 45 seconds.

**Website Signup:** <https://www.grocrm.com/buy/>




## 10. Subscription: AMS (Account Management System)

 [My Account](#) [Profile](#) [Support](#) [Upgrade](#) [Logout](#)

### Upgrade

Upgrade your account



### Upgrade your account

#### Plans

You are already subscribed to Gro CRM via the Apple® App Store® (in-app purchase). If you would like to purchase additional seats, add-ons or upgrade edition you will need to upgrade your account.

[Learn more: App Store FAQ.pdf](#)

Monthly Billing

Pro Subscription

2

Coupon Code

☒ Undelete Add-on

☐ Card Scanner Add-on

☐ Data Backup Add-on

Service	Quantity	Total (USD)
Pro Monthly Subscription	2	99.98
Undelete Monthly Subscription	2	9.98
Subtotal:		109.96
Discount:		(0.00)

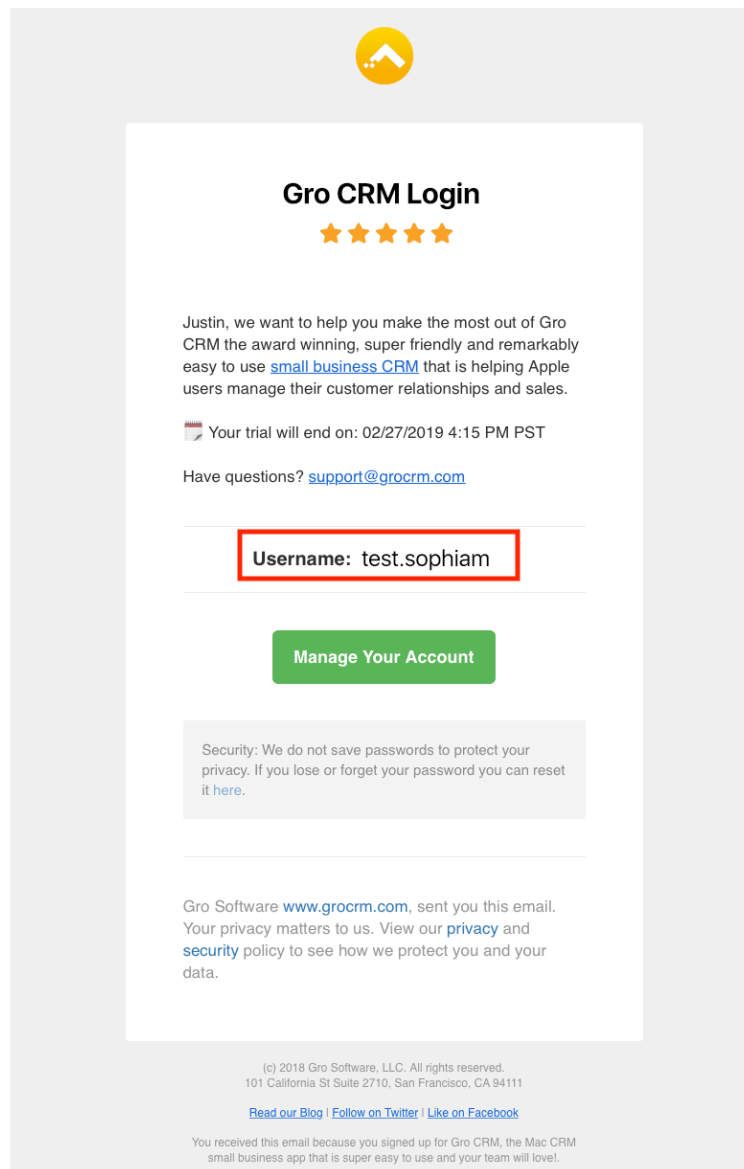
### Upgrade Your Account (Free Trial)

If you have a free trial, an in-app subscription or a regular subscription with us, you can upgrade your account anytime you like.

**Free Trial:** <https://www.grocrm.com/trial/>

**Upgrade Account:** <https://www.grocrm.com/account/upgrade/>

## 11. Login - Your Username

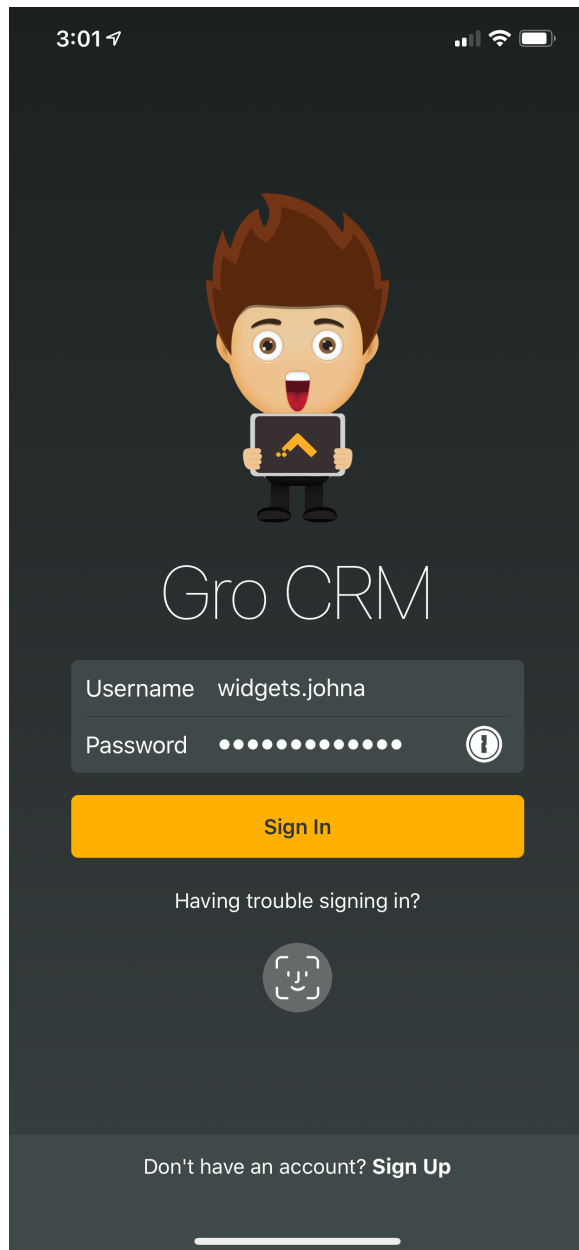


### Your Gro CRM Login Username

After you signup for a free trial or a subscription you will receive an email with your Gro CRM login. if you forget this login? You can retrieve it with our Forgot your Username:

<https://www.grocrm.com/account/forgot-username/>

## 11. Login - The App



### Gro CRM Login

Once you click on the Gro CRM app icon you will be brought to the login screen.

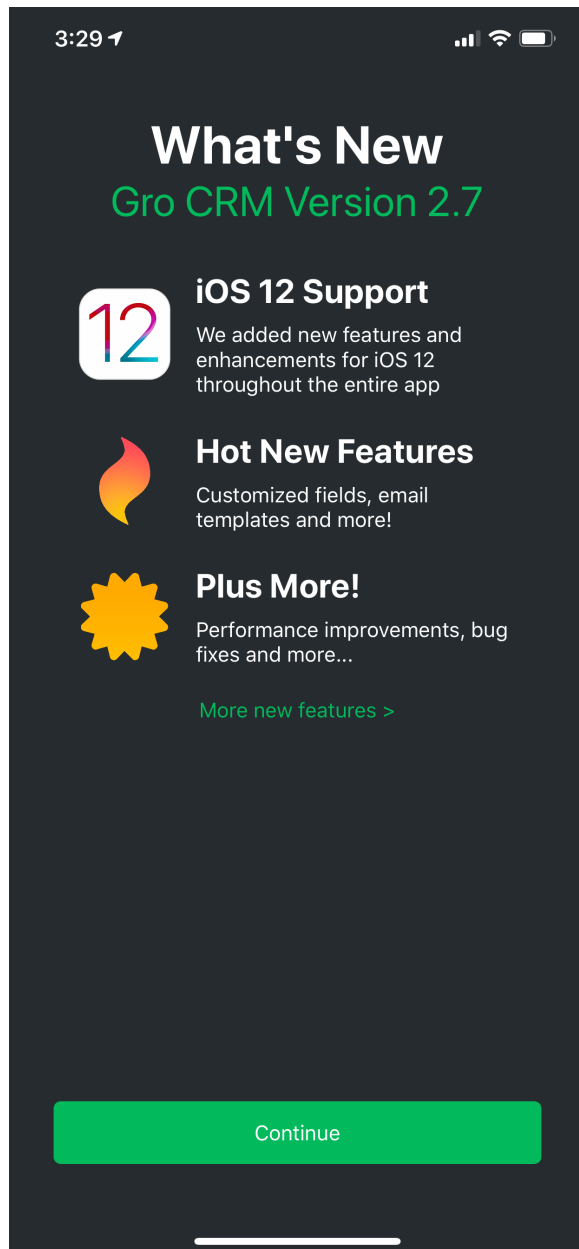
You will need to enter in your Gro CRM username and password. Your username was assigned to you when you sign up for a Gro CRM account.

Your password is private and secure and known only to you. We do not save your password. If you forget or lose your password. You will need to reset it.

**Tip:** We also offer options to use 1password to remember your password, Save password credentials, Touch ID and Face ID. (see images below how to use these).

**Note:** Note all feature are available to every edition of Gro CRM. Also depending on the level of your system access (Admin, Mgr or user) you may not have access to certain features.

## Login - What's New



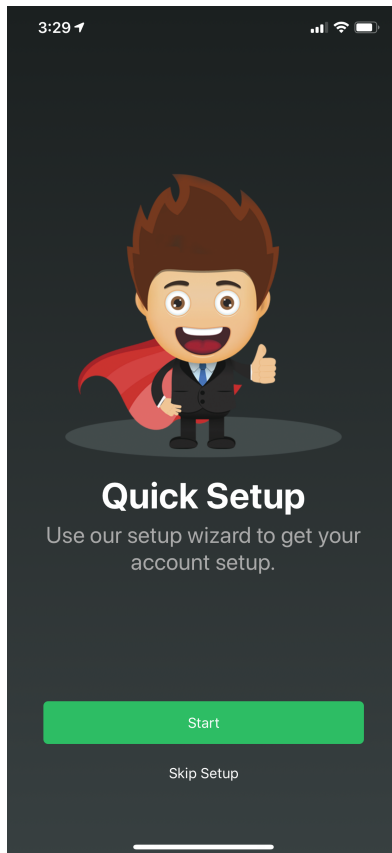
### What's New

The First time you login with a new version or update you will be presented with our What's New Screen.

This screen will tell you what version of Gro CRM you are using and any new features we have added.

*Tip: Click the "More new features" link and it will take you to our release notes.*

# Login - Setup Wizard



## Quick Setup Wizard

When you first login you will be presented with our Quick Setup wizard. This will help you setup some key features before starting.

- **Activate Security:** Touch ID or Face ID
- **Import Contacts:** Import your Apple Contact

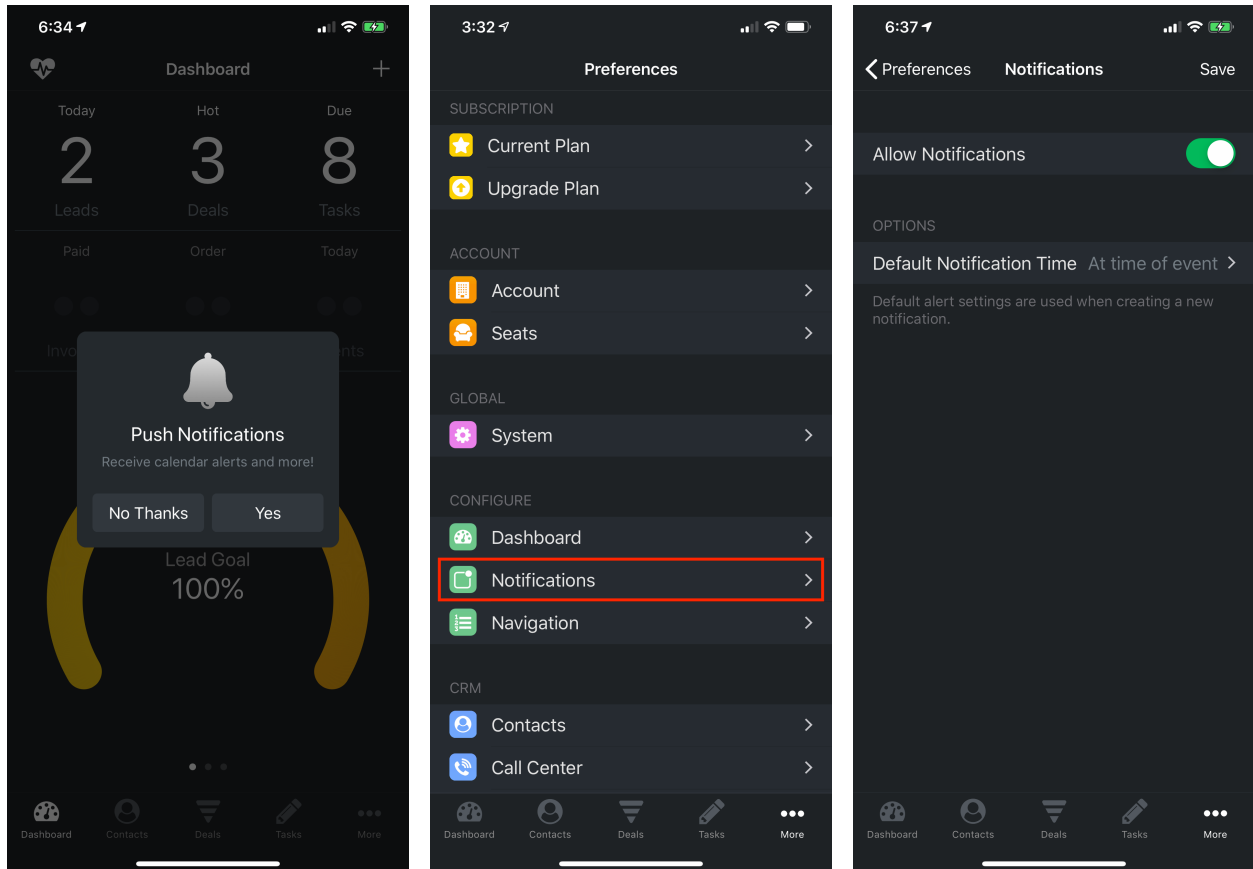
*Note: if you have a lot of contacts it might take a bit of time for them to show up as we process them in the background so don't worry they will appear. If you have notifications turned on we will send you a notification when they are completed.*

- **Create Contact Folders:** Create Customer contact folders

Example: By default we load the following contact folders:

- Suspect
- Prospect
- Leads
- Opportunities
- Clients
- Suppliers
- Locations

## 11. Login: Notifications



### Push Notifications

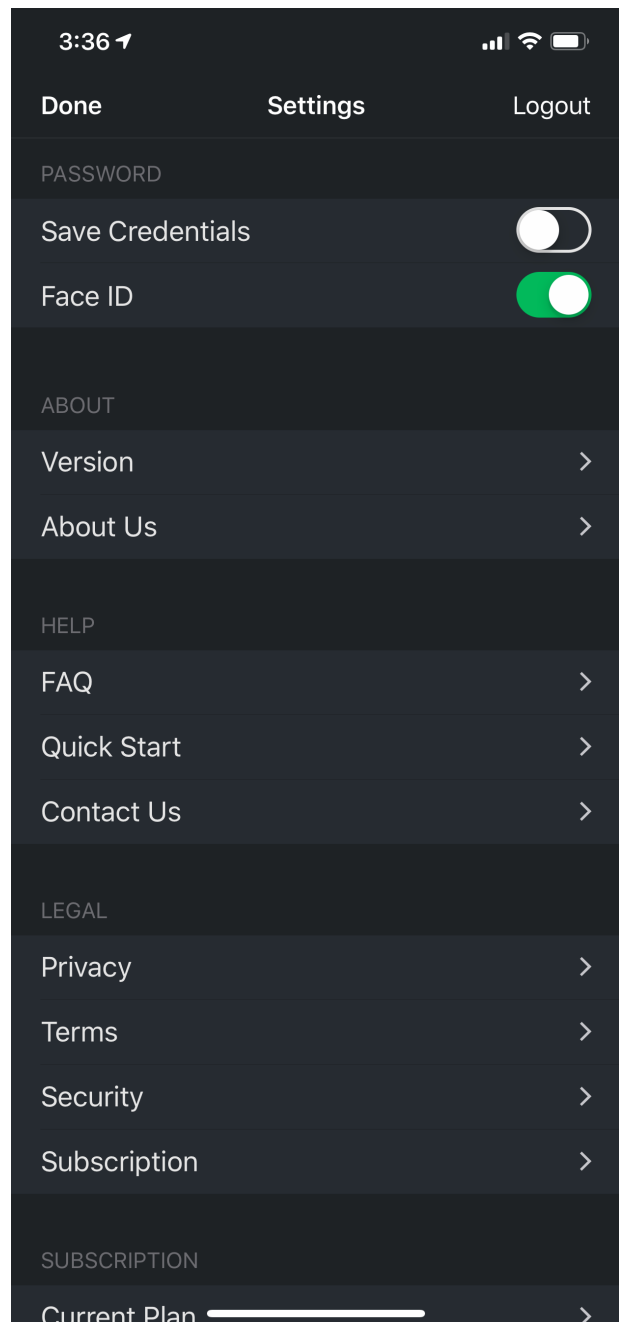
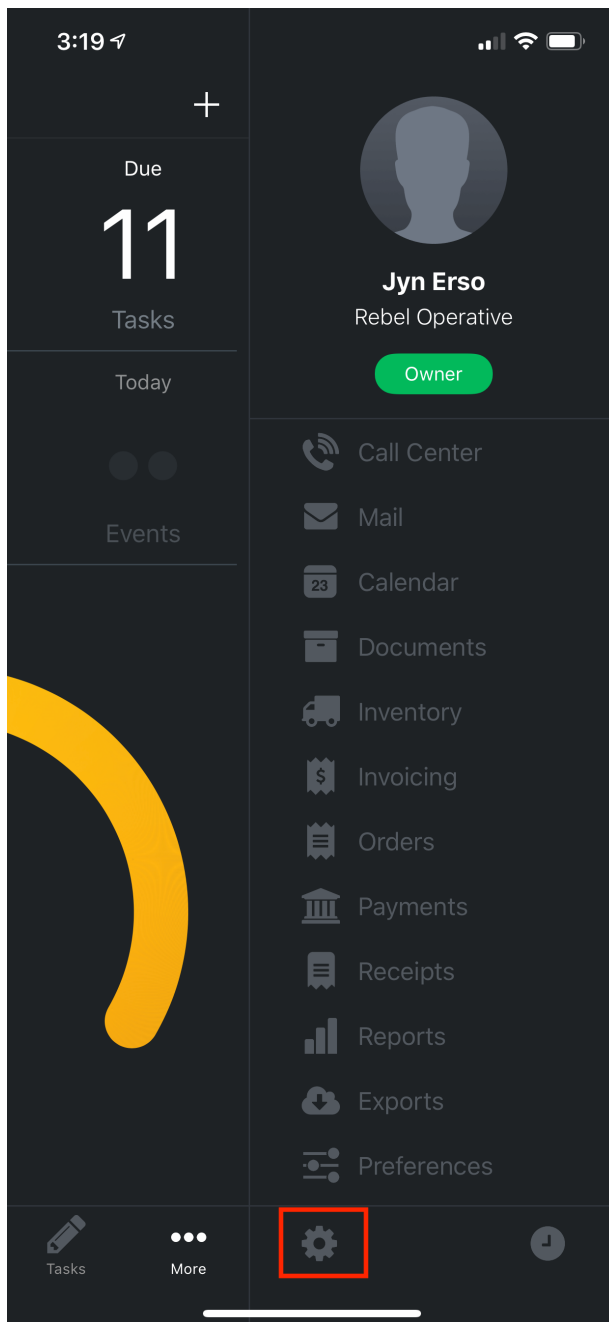
When you first login you will be prompted to activate push notifications. If you choose not to activate push notifications right away don't worry you can do it later by going to Preferences->Notifications.



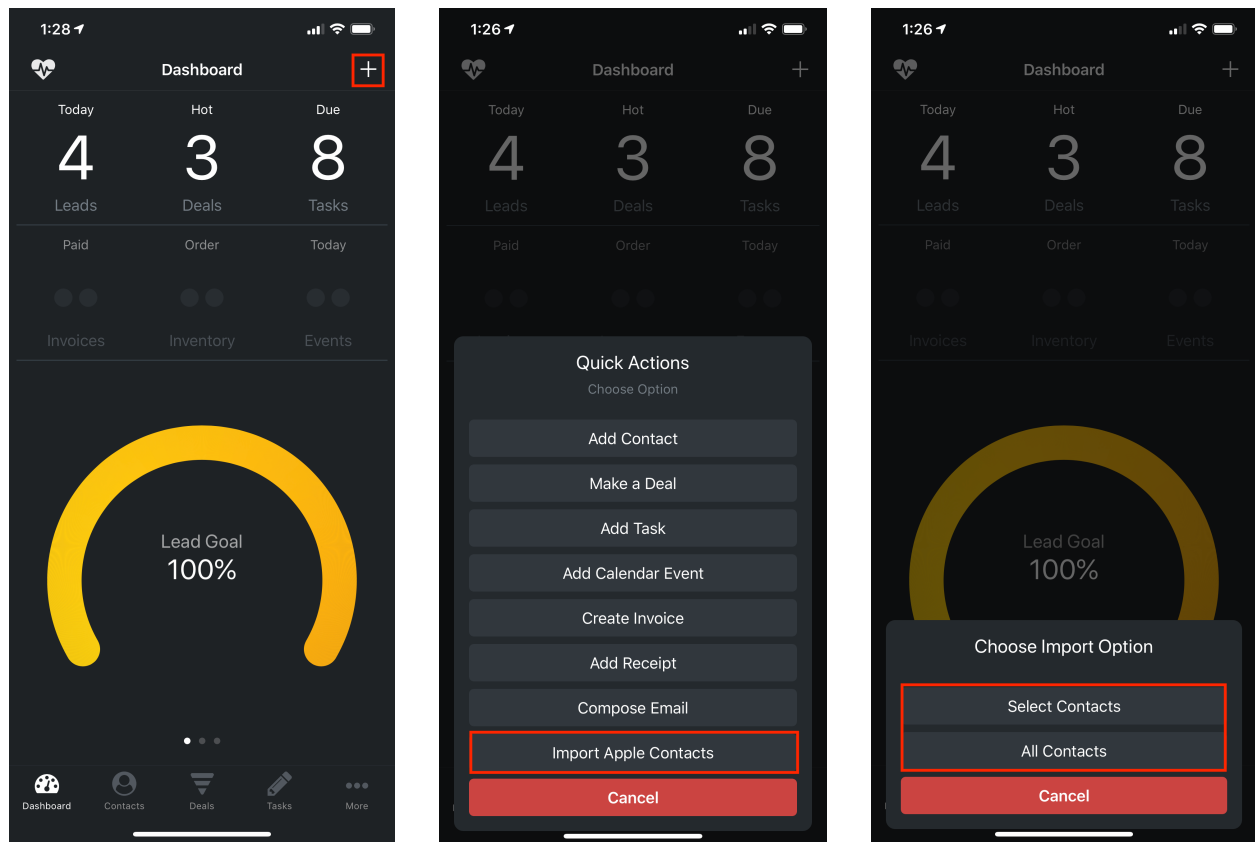
## 11. Login: Settings

### Gro CRM Settings

To save your Gro CRM credentials, or to use either Touch ID or Face ID. Go to the Gro CRM settings and click “Done” to save.



## 12. Import Your Apple Contacts



### Import your Apple Contacts into Gro CRM

To import your existing Apple contacts you can use our Apple Contacts Importer on our dashboard. You can choose to import “All Contacts” or “Select Contacts” that you just want to import with our Quick Action menu.

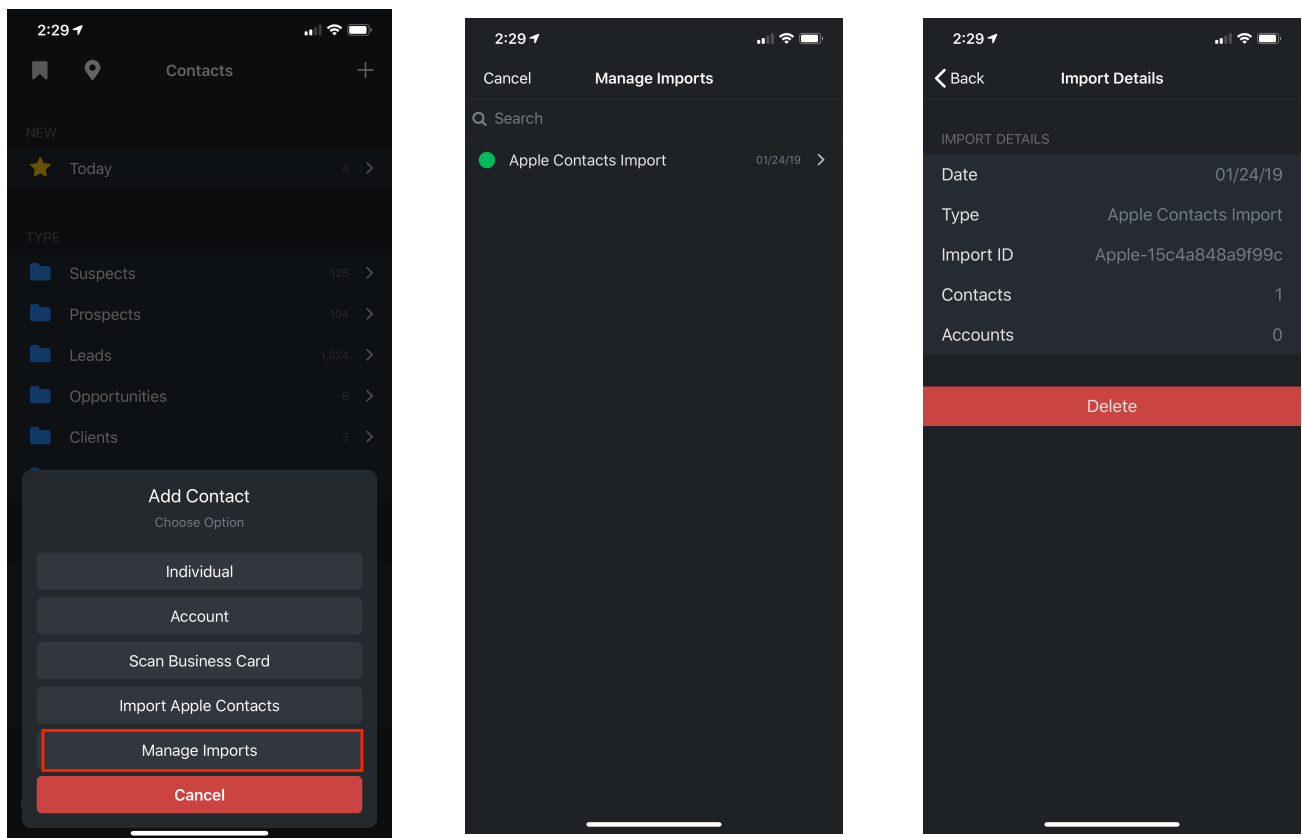
Once you select your contacts to import be patient for them to show in your “Contacts” list. If you have 100 or less contacts they will import almost instantaneous, however if you have 1000’s of contacts it might take a while. Don’t worry we will do the work in the background while you continue to use the app. If you have notifications turned on we will let you know when your contact import is completed.

#### **Notes:**

*Your Apple contacts must be in good order to import properly. You must use the define Apple properties to import all your contact data correctly. If you need more control over your contact imports we suggest you use our CSV spreadsheet importer*

*Bulk geo location data for maps is only uploaded for paid Basic or Pro editions of Gro CRM (up to 2500 contacts).*

## 13. Manage Your Imports

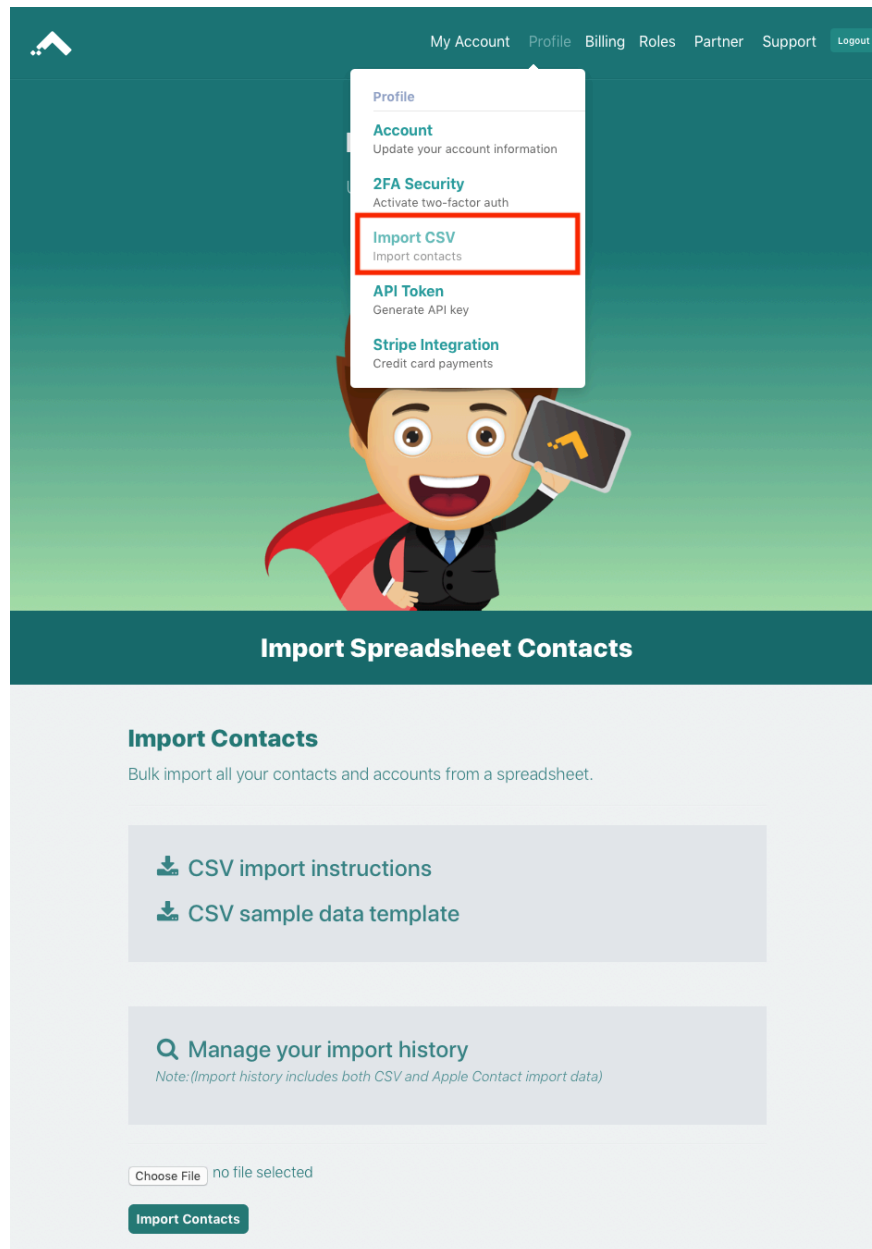


### Manage Bulk Imports

To navigate the features of Gro CRM use the toolbar on the bottom of the screen.

Click the toolbar tabs to jump from feature to feature.

## 14. Spreadsheet Importer (.CSV)



### Spreadsheet (.CSV) Importer

Login to our ASM (Account Management System) at:

<https://www.grocrm.com/account/> and select the “Import CSV” option under the “Profile” menu.

*Note: You can mass delete your imports with “Manage your Import History”.*

## 15. WordPress Contact-to-Leads Plugin

### Gro CRM Contact

#### Contact us!

We will email you a newsletter weekly & send you important information!

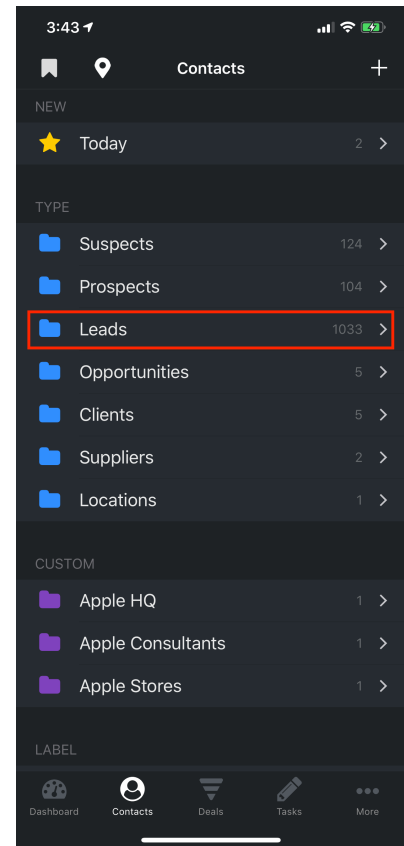
First Name\*

Last Name\*

Email Address\*

\* = required field

SUBMIT

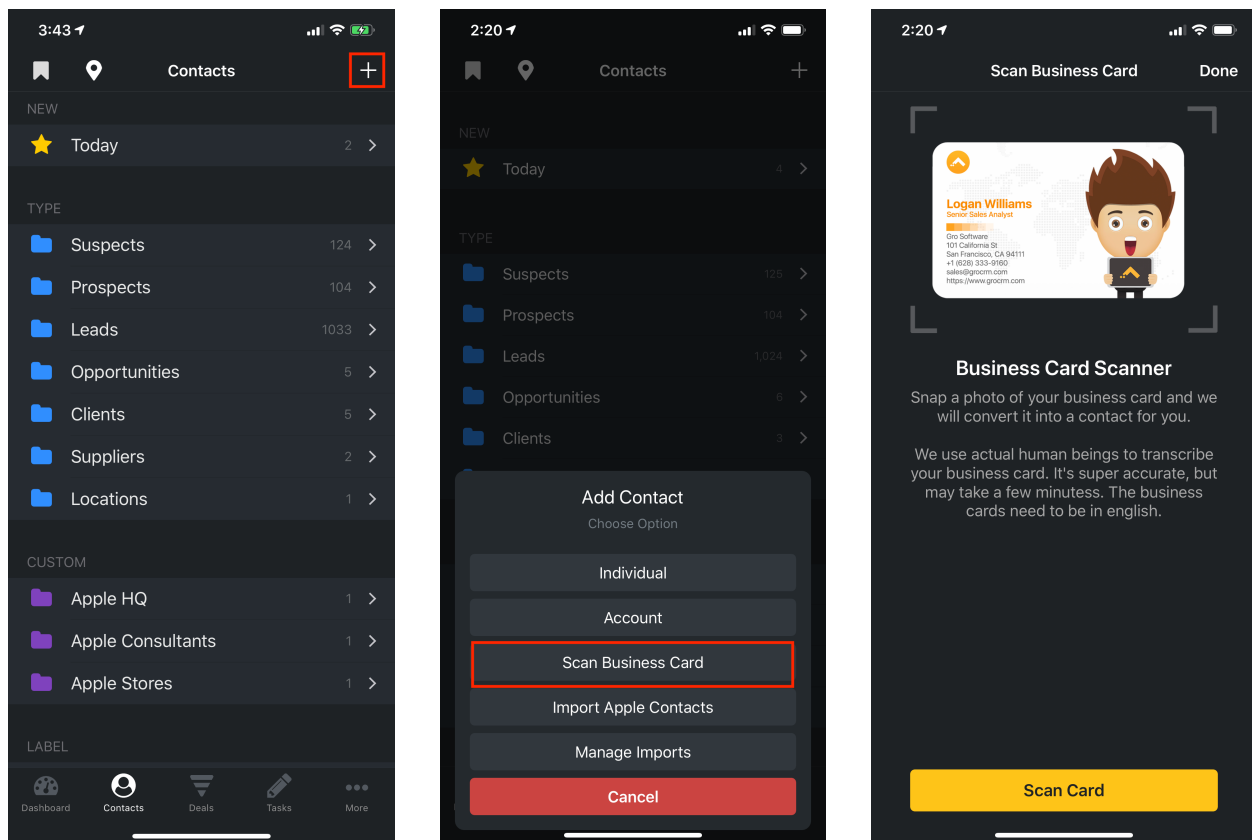


### Funnel your website leads into Gro CRM

Download the Gro CRM Contact-to-Lead Wordpress Plugin for your website and start importing leads right into your Gro CRM account from your WordPress website(s).

You can learn more here: <https://www.grocrm.com/mac-crm/integrations/wordpress/>

## 16. Business Card Scanner (Add-on)



### Scan Business Cards and Create Contacts with Ease

With the Gro CRM business card scanner, you can take a photo of a business card and the card information will be inserted into your Gro CRM contacts within just a few minutes! We use real people, not machines, to transcribe business cards. You will get the most accurate and complete data every time with Gro CRM.


Salespeople, small business and individuals are going to love how much time this add-on will save them. No more losing business cards, or forgetting to enter them into your CRM at the end of the day! When you get a new business card just scan it right away and your new lead information will be saved into your Gro CRM contacts.

**Note:** We also save the original photo of your business card so you can view it later. This is a really nice little feature.






## 17. Zapier Integration

Connect Gro CRM to 1,000+ Apps

 Gro CRM



↔

 Search for an app to connect

 > 



**Create Gro CRM leads from Mailchimp subscribers**  
Need Mailchimp subscribers inserted into your CRM? This Mailchimp-Gro CRM integration will automatically find new  
[...more](#)

Connect

 > 



**Create Gro CRM leads automatically from Wufoo Forms**  
Need to use forms to generate leads for your CRM? Wufoo makes it easy to collect contact information from an online  
[...more](#)

Connect

 > 



**Add Drift leads automatically to Gro CRM**  
Tired of missing lost leads? This Drift-Gro CRM integration to import new qualified leads from Drift  
[...more](#)

Connect

 > 

**Add new Google Contacts as Gro CRM leads**  
Is your CRM missing contacts? This Google Contacts-Gro CRM integration takes the pain out of getting your Google Contacts into  
[...more](#)

Connect

 > 

**Create Gro CRM leads from new Google Forms entries**  
I've spent hours transferring form data and lost it all! Has this ever happened to you? Use this integration to connect  
[...more](#)

Connect

< 1-5 (of 25) >

3:46


Contacts


+


NEW


★ Today 2 >


TYPE


 Suspects 124 >


 Prospects 104 >

 Leads 1033 >


 Opportunities 5 >


 Clients 5 >


 Suppliers 2 >

 Locations 1 >


CUSTOM


 Apple HQ 1 >


 Apple Consultants 1 >


 Apple Stores 1 >


LABEL

 Dashboard

 Contacts

 Deals

 Tasks

 More

### Connect your Apps to Gro CRM with Zapier

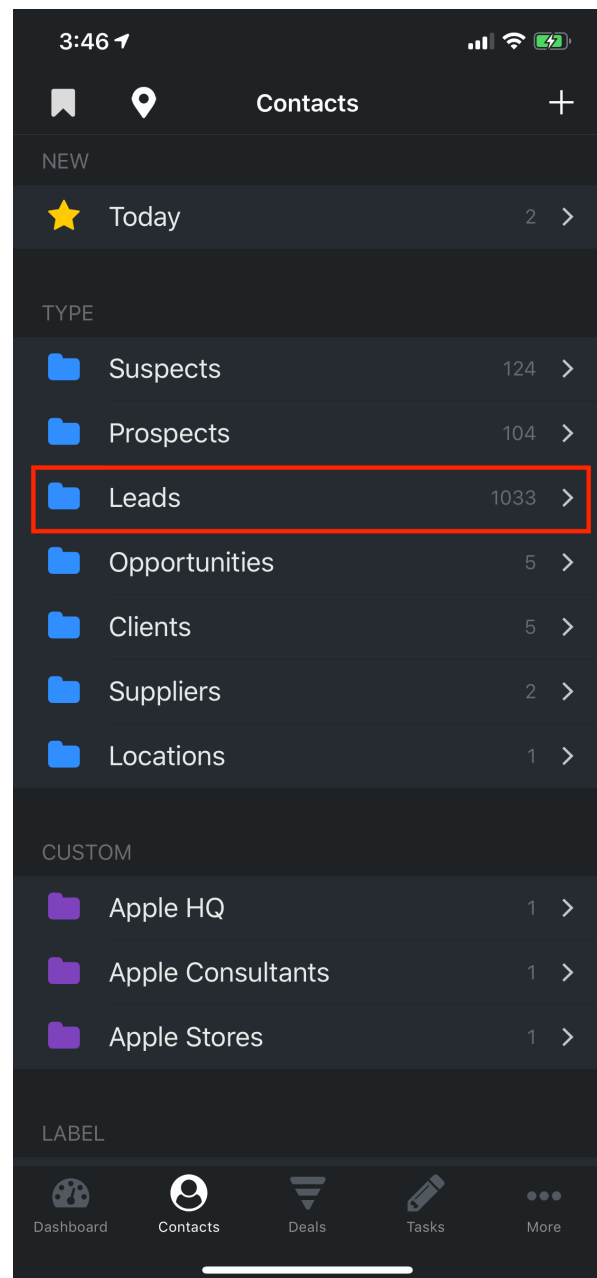
With the **[Gro CRM Zapier integration](#)**, small businesses can connect and share information between Gro CRM and the apps they use most often such as Facebook Lead Ads, Slack, Quickbooks, Google Sheets, Google Docs & many more! Connect your apps to Gro CRM and discover limitless ways to increase your productivity and automate your workflows

How to connect your apps to Gro CRM with Zapier: <https://www.grocrm.com/support/tutorials/article/?title=gro-crm-zapier-integration>

Start to make connections to your favorite apps today: <https://zapier.com/apps/gro-crm/integrations>

## 17. Gro CRM API

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      "linkedin": "noahwhite",
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        "apple"
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      "phone": "(408) 996-1010",
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      "facebook": "apple",
      "twitter": "apple",
      "linkedin": "apple",
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        "awesome",
        "motherhip"
      ]
    }
  ]
}
```



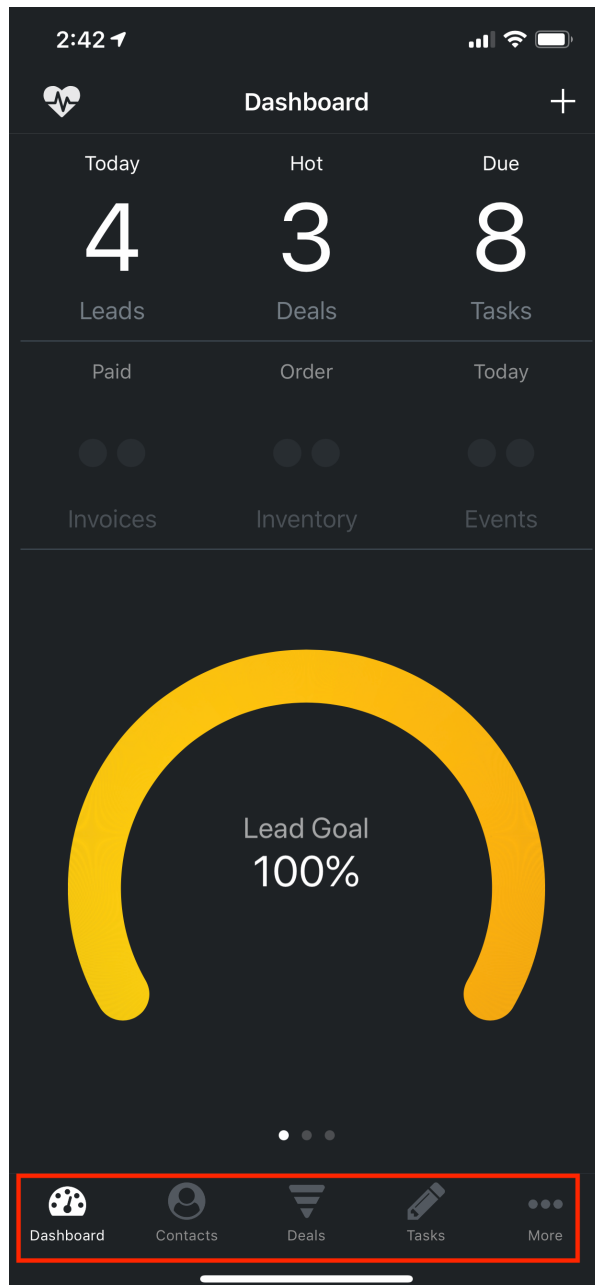
### Gro CRM API and Frameworks

Your business can easily integrate your backend systems to talk to ours. Make a bridge between your backend systems and Gro CRM. Some of our API hooks include: contacts, accounts, deals, tasks, inventory management and more.

API Docs: <https://www.grocrm.com/developer/docs/>

API Frameworks : <https://aithub.com/GroCRM>

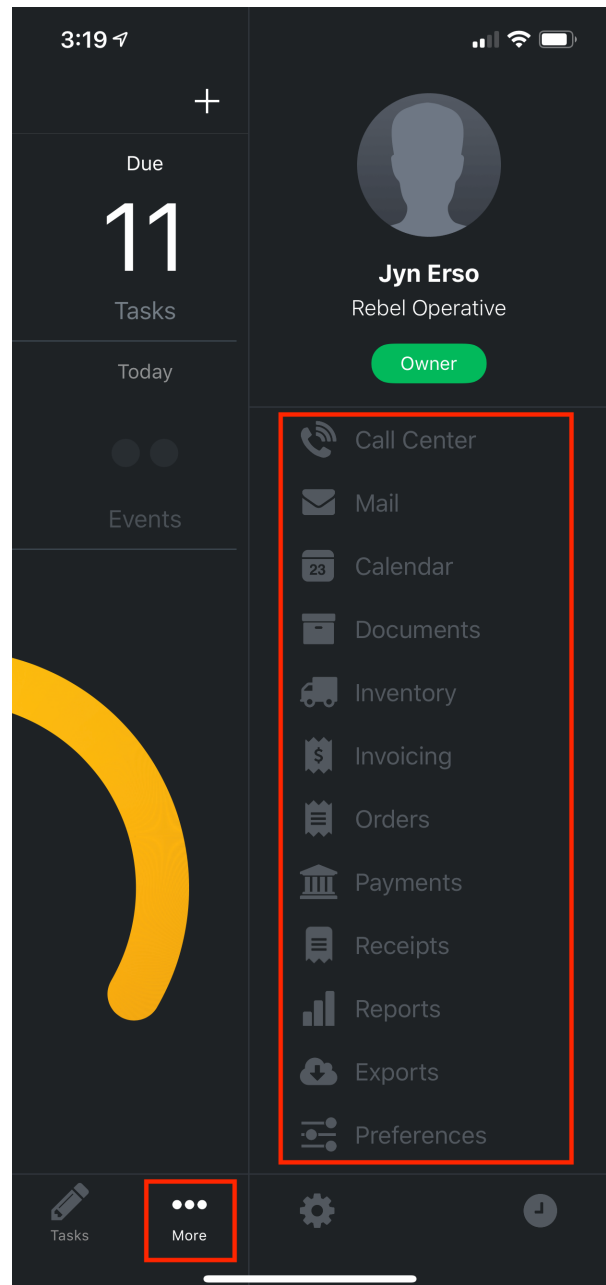
## 18. Navigation



### Gro CRM Toolbar

To navigate the features of Gro CRM use the toolbar on the bottom of the screen.

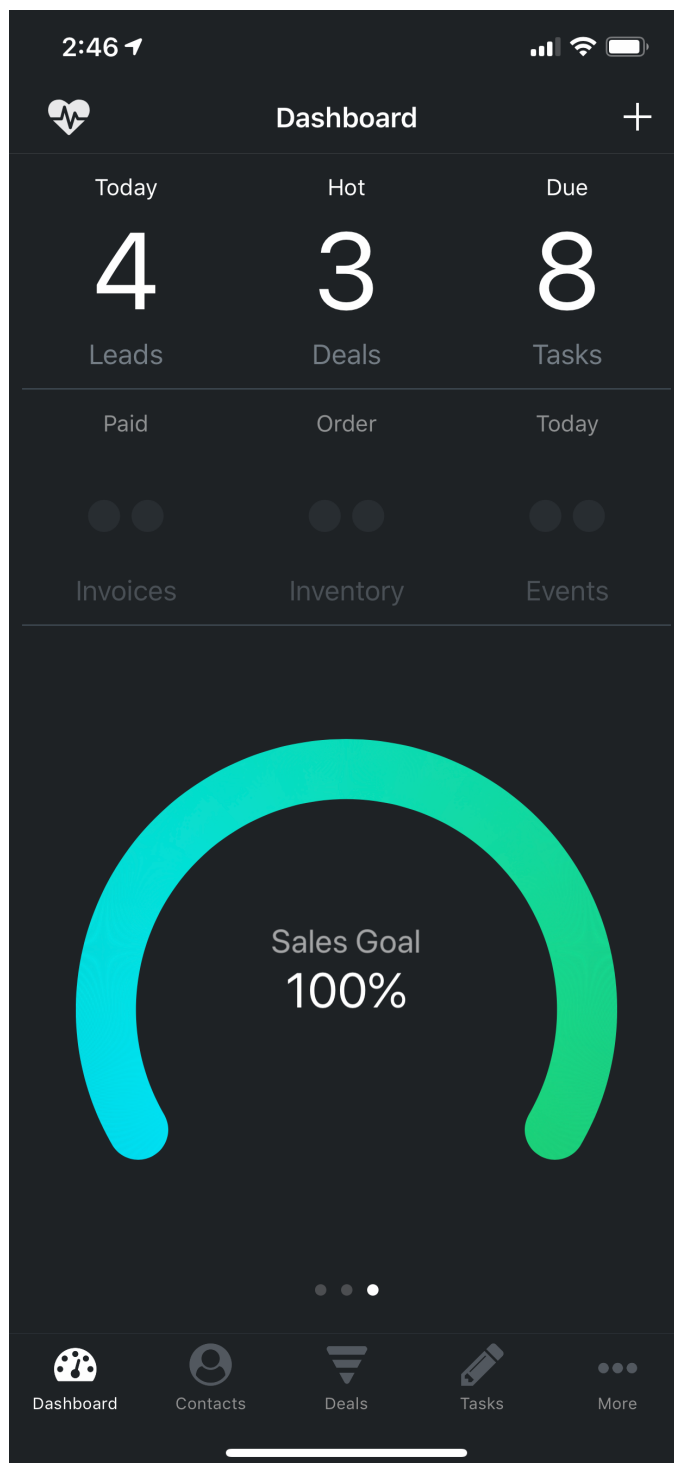
Click the toolbar tabs to jump from feature to feature.



### Gro CRM Side Toolbar

If you click the “More” tab on the bottom toolbar a “Side Toolbar” will slide open that will give you even more features and options.

## 19. Dashboard



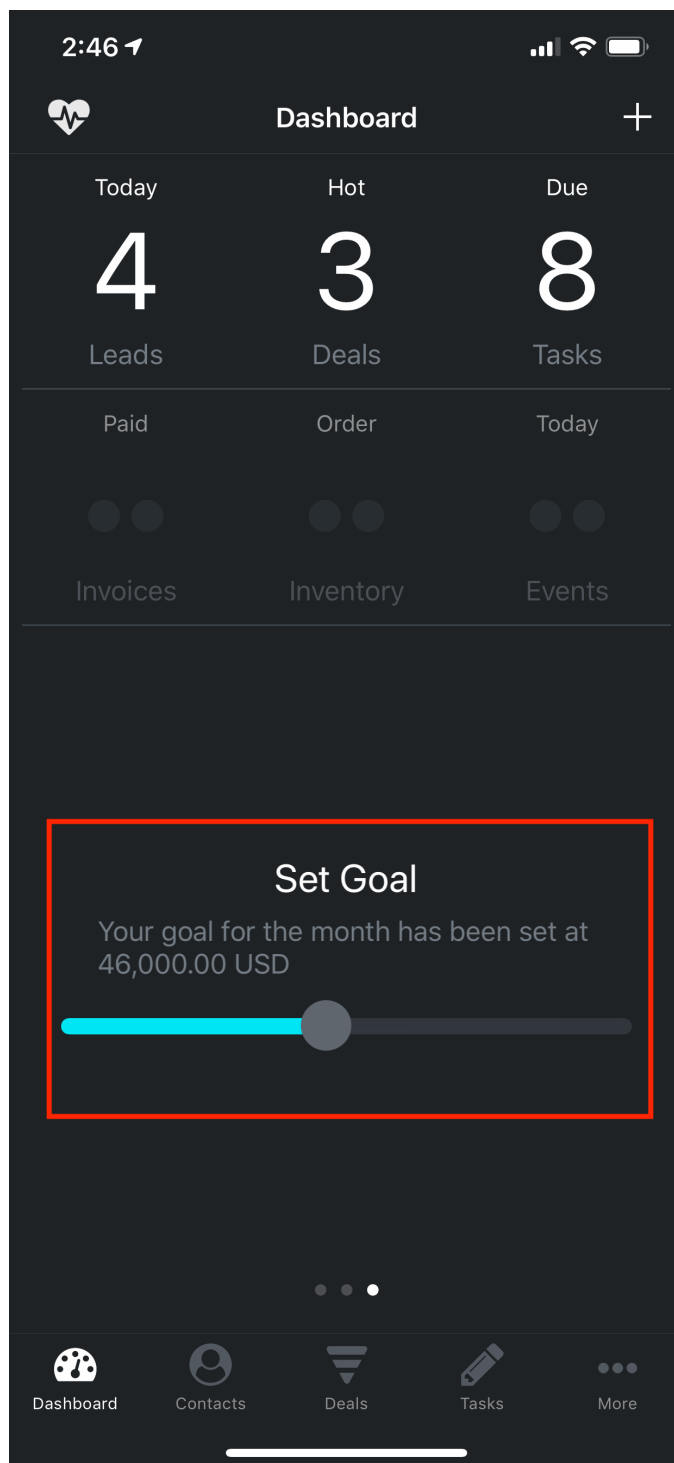
### Stats and Goals

The Gro CRM dashboard is a real-time view of your business.

The numbers at the top of the dashboard give you a statistical view of your business. For example you can see all the new leads that are being acquired each day as they come into the system.

The goal gauges at the bottom can be swiped through (Leads, Deals and Sales).

## 19. Dashboard: Set Goals

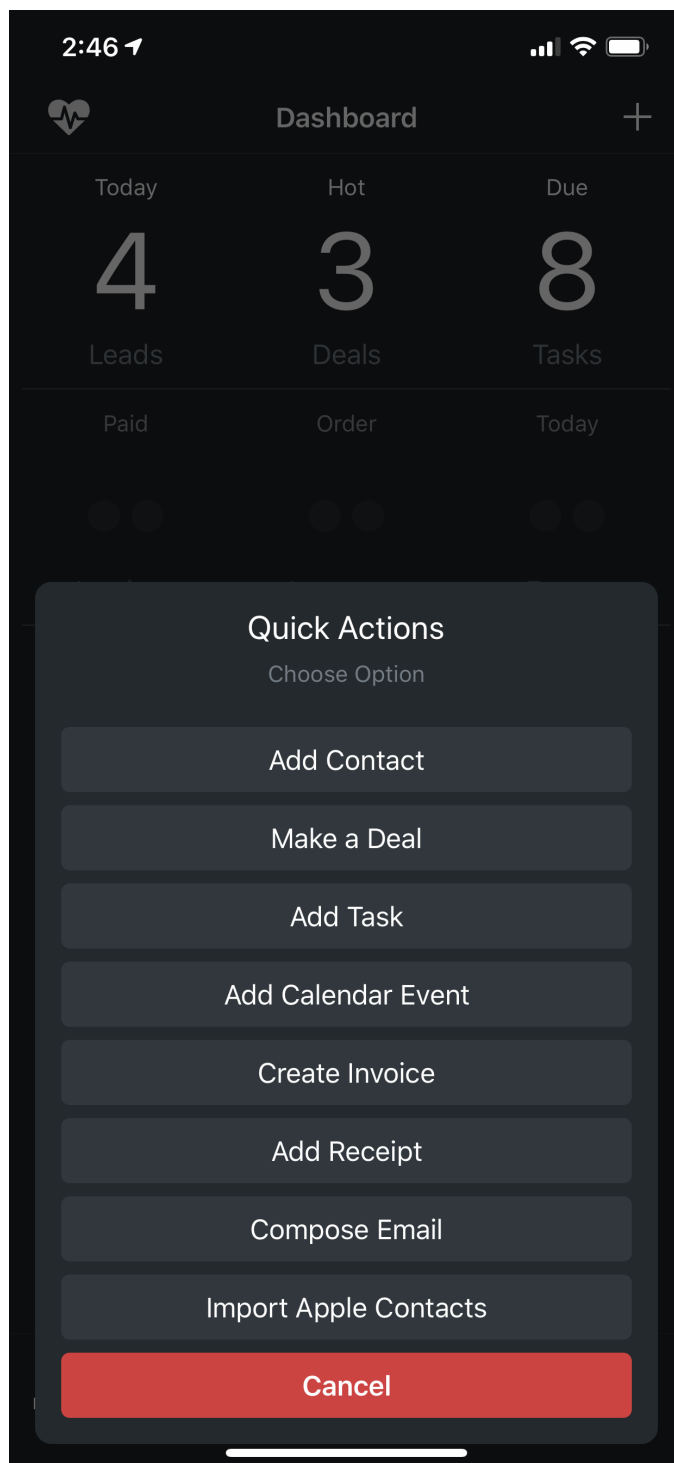


### Set Goals

To change a goal you can tap on the gauge. The gauge will flip-over. Then you can change your goal by moving the slider. Then just tap once again to go back to the the gauge results view.

**Tip:** You can also change your goals in the "Preferences" -> "Dashboard"

## 19. Dashboard: Quick Actions



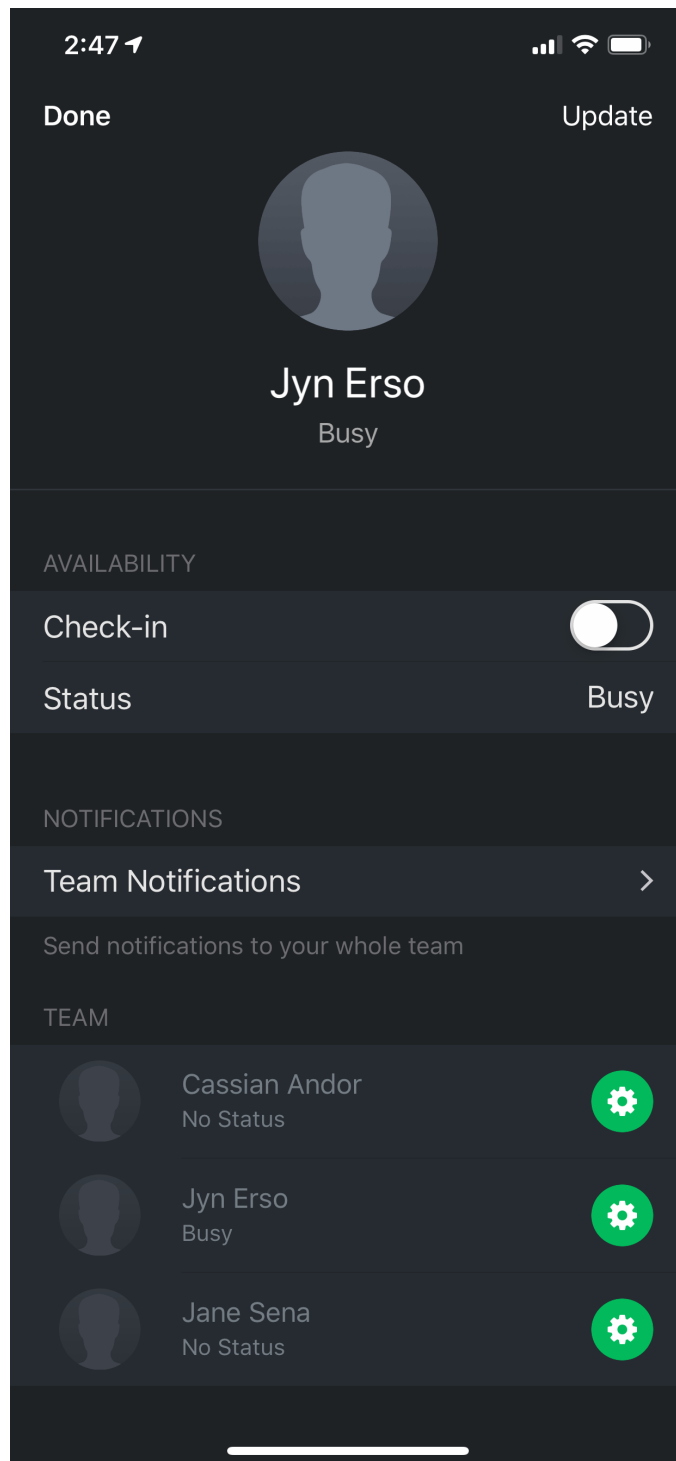
### Quick Actions & Status board

The Gro CRM “Quick Actions” allows you to access critical functions right from the dashboard without navigating to the appropriate feature. This is a real time saver for completing tasks quickly and efficiently.

**Tip:** To open the “Quick Actions” just click the “+” button on the top right of the dashboard screen.

**Tip:** To open the “Status Board” just click the the heart icon on the top left of the dashboard screen.

## 19. Dashboard: Status Board (Basic and Pro)



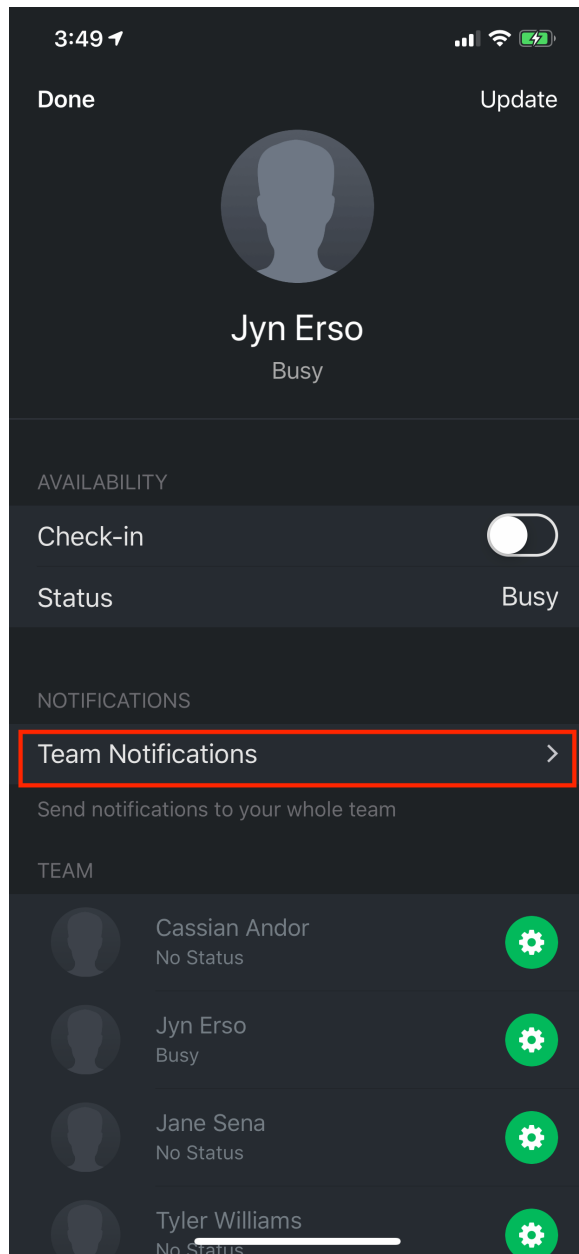
### Status Board

The Gro CRM Status Board allows you to see all your users and what they are up to. Each user can check-in and set a status (Example: “Out for lunch” or “in a meeting”) this way your entire team can see what everything is doing.

If you click on the green button next to the user, you will have options to message, call, get directions or FaceTime the user.

**Tip:** If you have admin level access. You have the ability to send notifications to your entire team with the “Team Notification” feature. This is a great way to let your team know that is time for a meeting or just broadcast company messages to everyone.

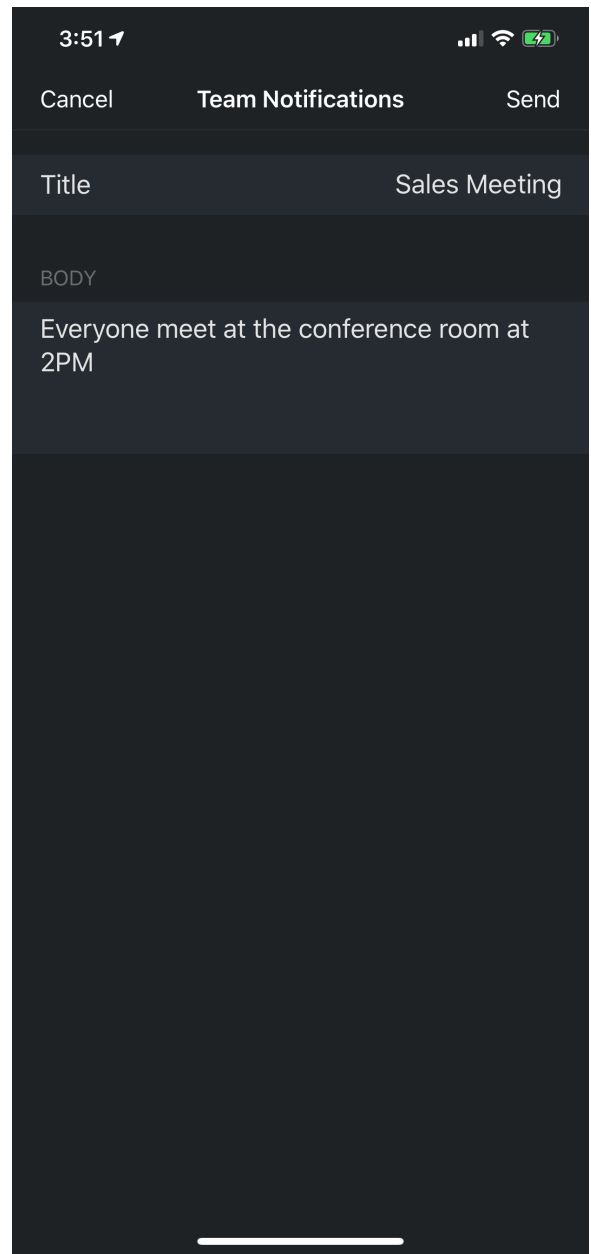
## 19. Dashboard: Status Board Team Notifications (Pro)



### Send Notifications To Your Team

Send notifications to your team if they have notifications turned on.

**\*\*Basic and Pro Edition Only\*\***

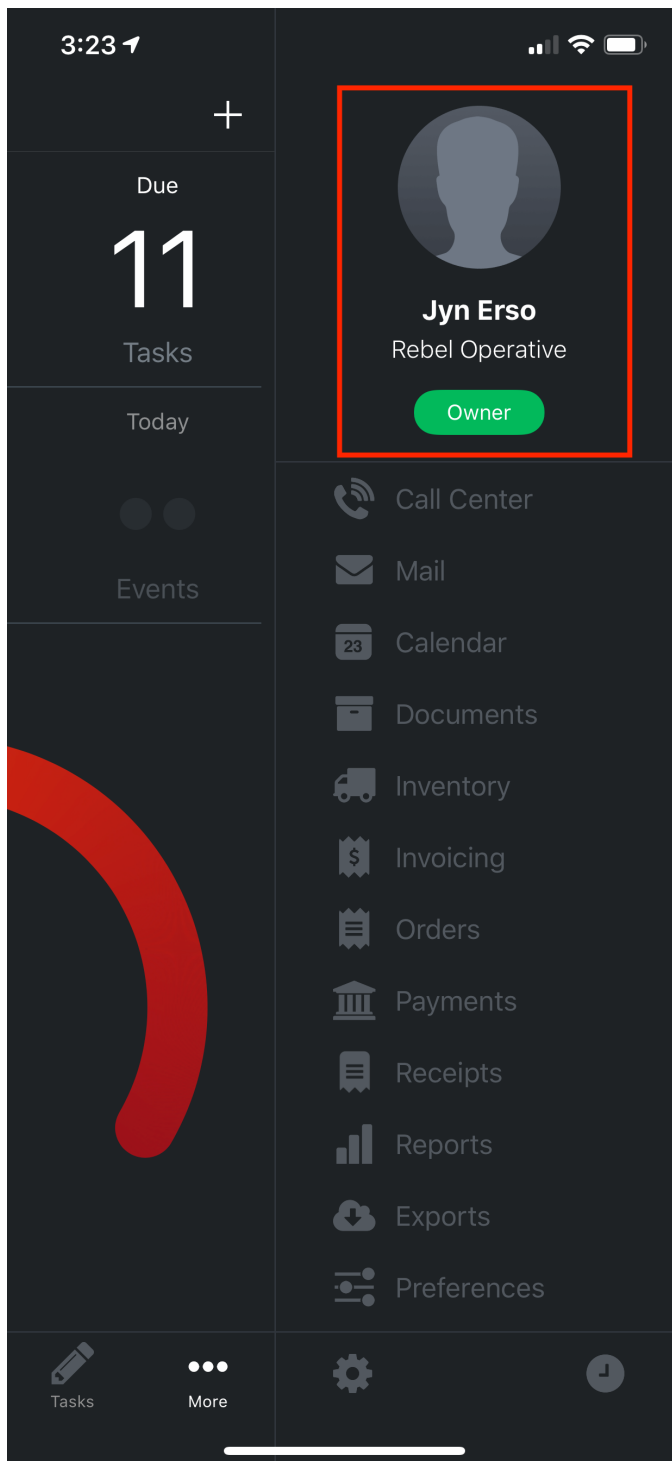


### Create Your Notification

Enter in a "Title" and "Body" for your push notification.



## 20. Account

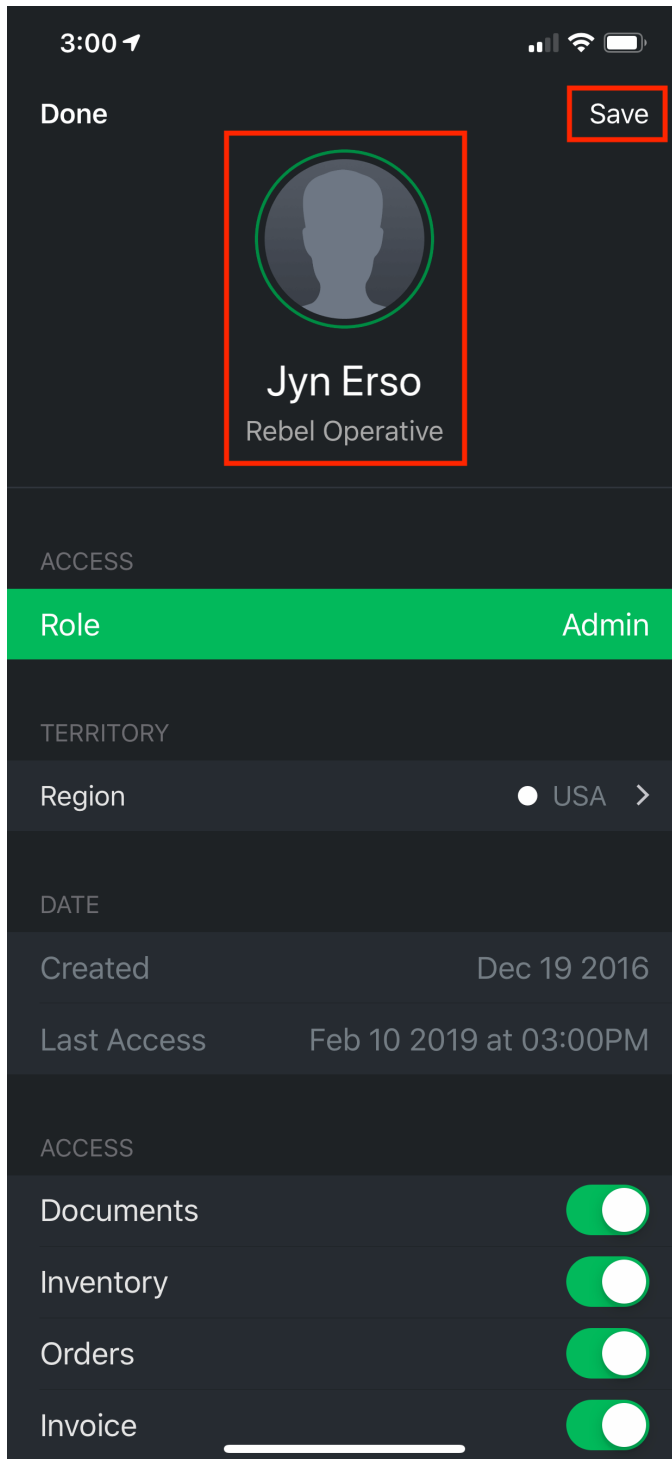


### Your Account

If you click the image on the “Side Bar” it will take you to your account information.

Note: If you are the account owner you will see the green pill box under your title.

## 20. Account: Settings



### Account Settings

If you click the image in your account you can add or change your profile image.


If you change the data within your account just click the “Save” button on the top right to save your changes.

The “Role” option (colored bar) if touched can be change ACL (Access Control Lists) for the user.

**Note:** Account owners can not change their “Role” type. Account owners are required to be an “Admin”

## 20. Account: Additional Settings:

3:00 1

Done  Save

Jyn Erso

ACCESS

Documents ☒

Inventory ☒

Orders ☒

Invoice ☒

Payment ☒

Receipt ☒

USERNAME

Username rogue.jyne

USER

Title Rebel Operative

First Name Jyn

Last Name Erso

LOCATION

Country >

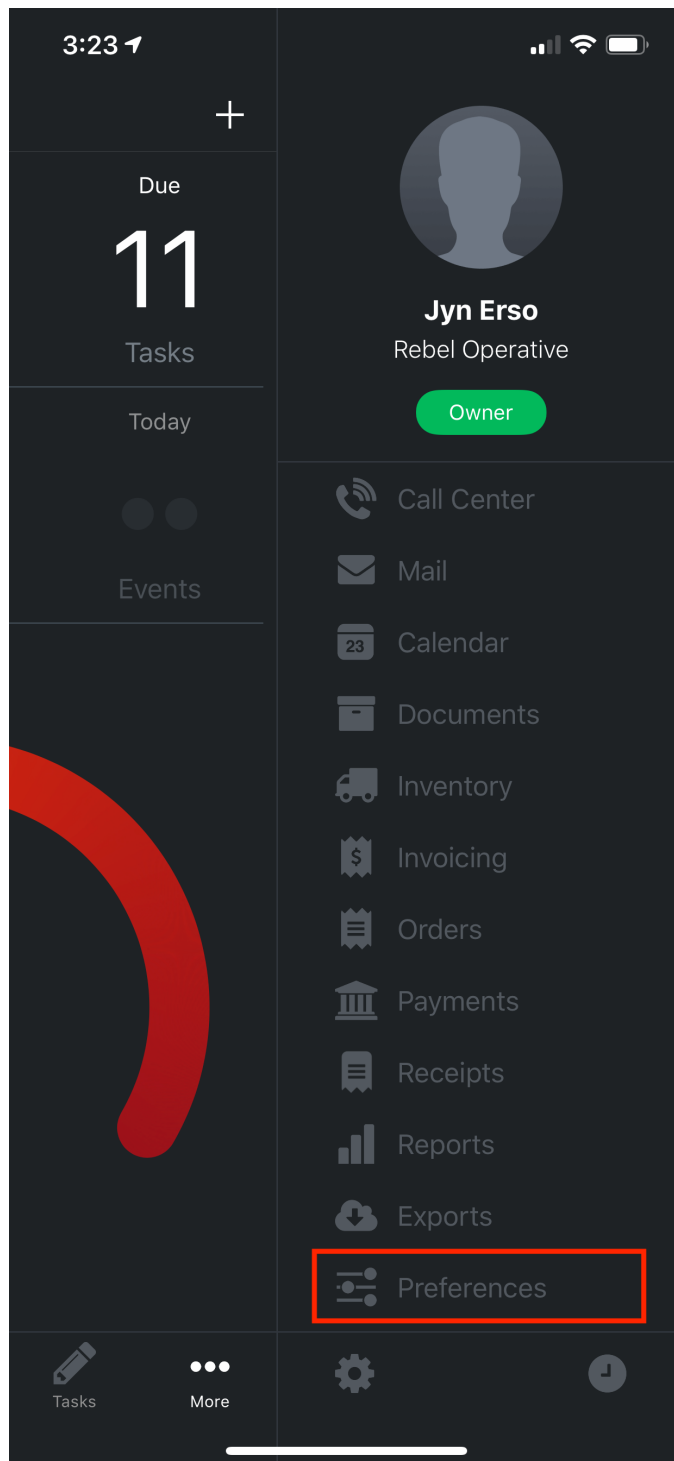
Address

### Account Settings

Under the “Access” portion of your account you can activate certain features or disable them for each user.

**Note:** all these features depend on the edition and access level of your account.

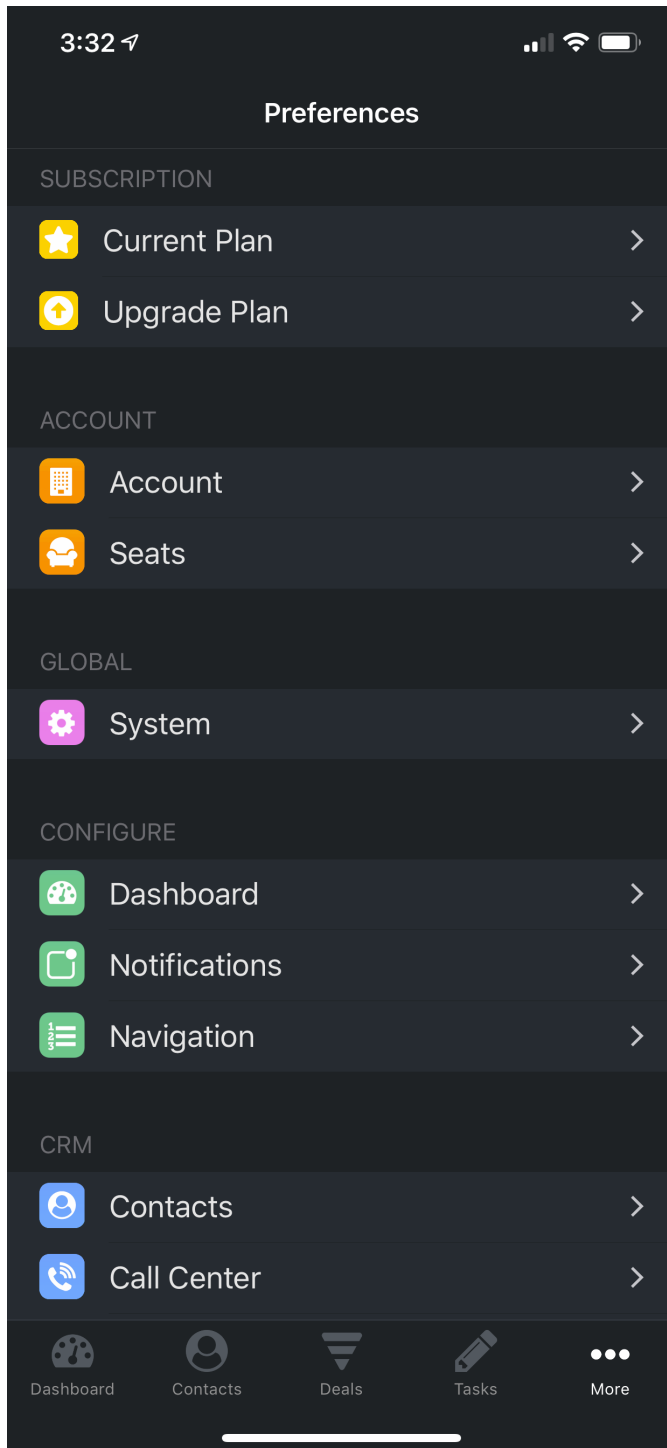
## 21. Preferences



### Preferences

On the Gro CRM Sidebar you can access the system preferences where you can customize the entire CRM system to your industry, business and team.

## 21. Preferences: List

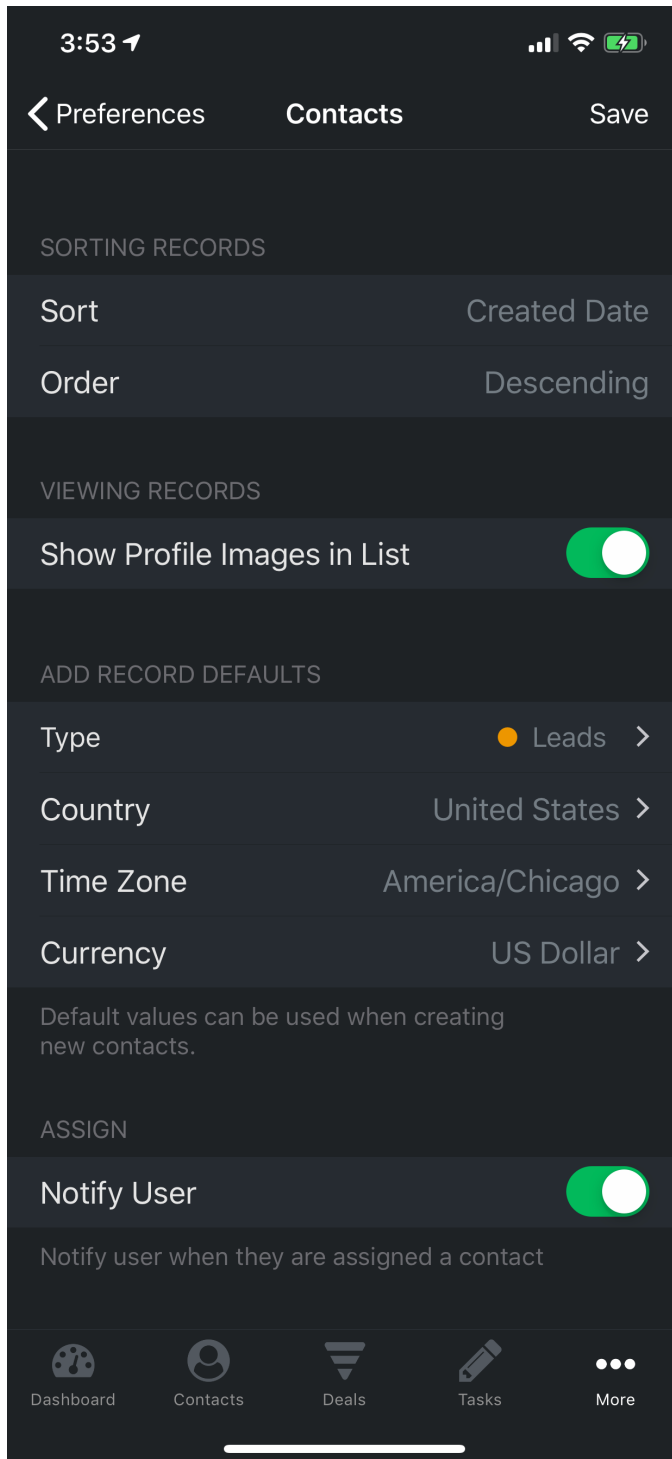


### Preference List

We have a lot of preferences to customize in the system for your business and industry. Depending on what level of access and Gro CRM Edition you have you may see many options or very few.

**Example:** Click the “Contacts” preference under “CRM” to make changes.

## 21. Preferences: Details



### Preference Details

Once you select a preference options (Example: Contacts). You will find a myriad of options under each preference.

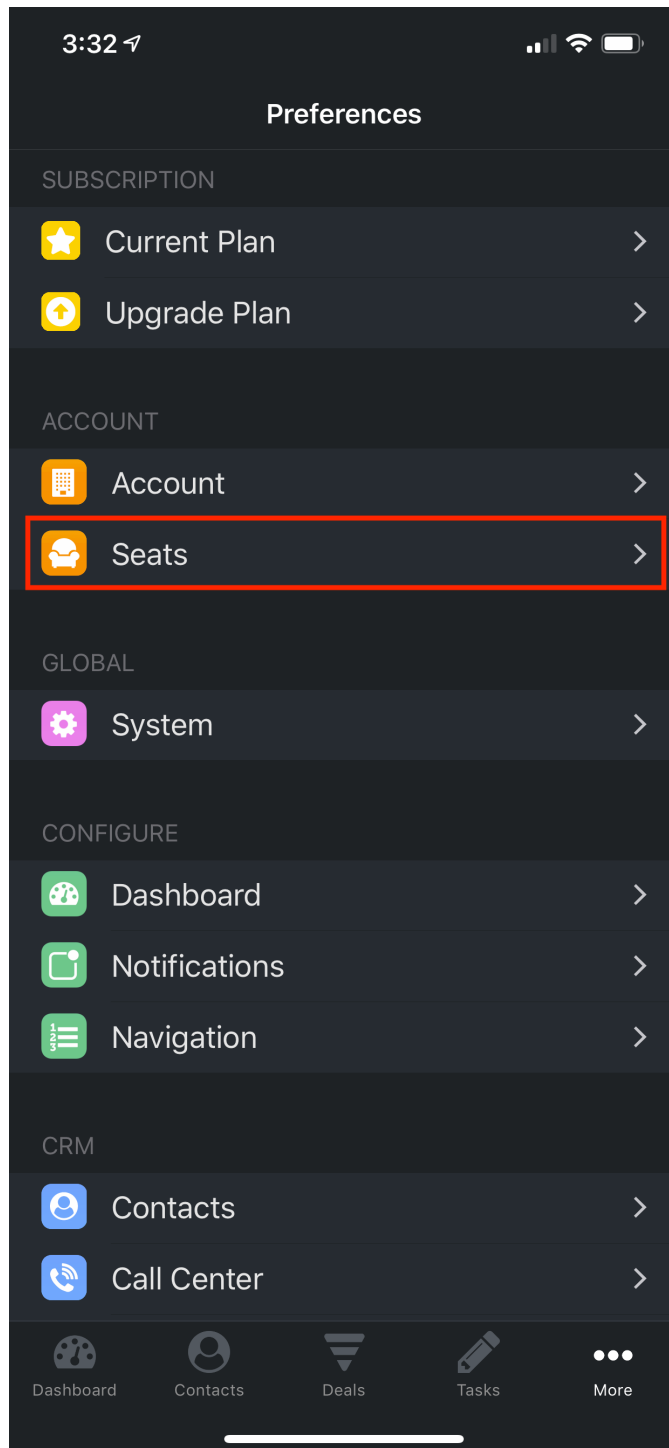
*Example: You can change the names of your "Contact Types". We use some basic default names such as (Suspects, Prospects, Leads, Opportunities, Clients, and Suppliers).*

*You can change type names to suit your line of business.*

**Example:** *f you are a dental office you could call one contact type: patients, or if you are a teacher you could call one type: students. You get the idea.*

*Just click the "Save" button on the top right when done to save your changes.*

## 21. Preferences: Seats

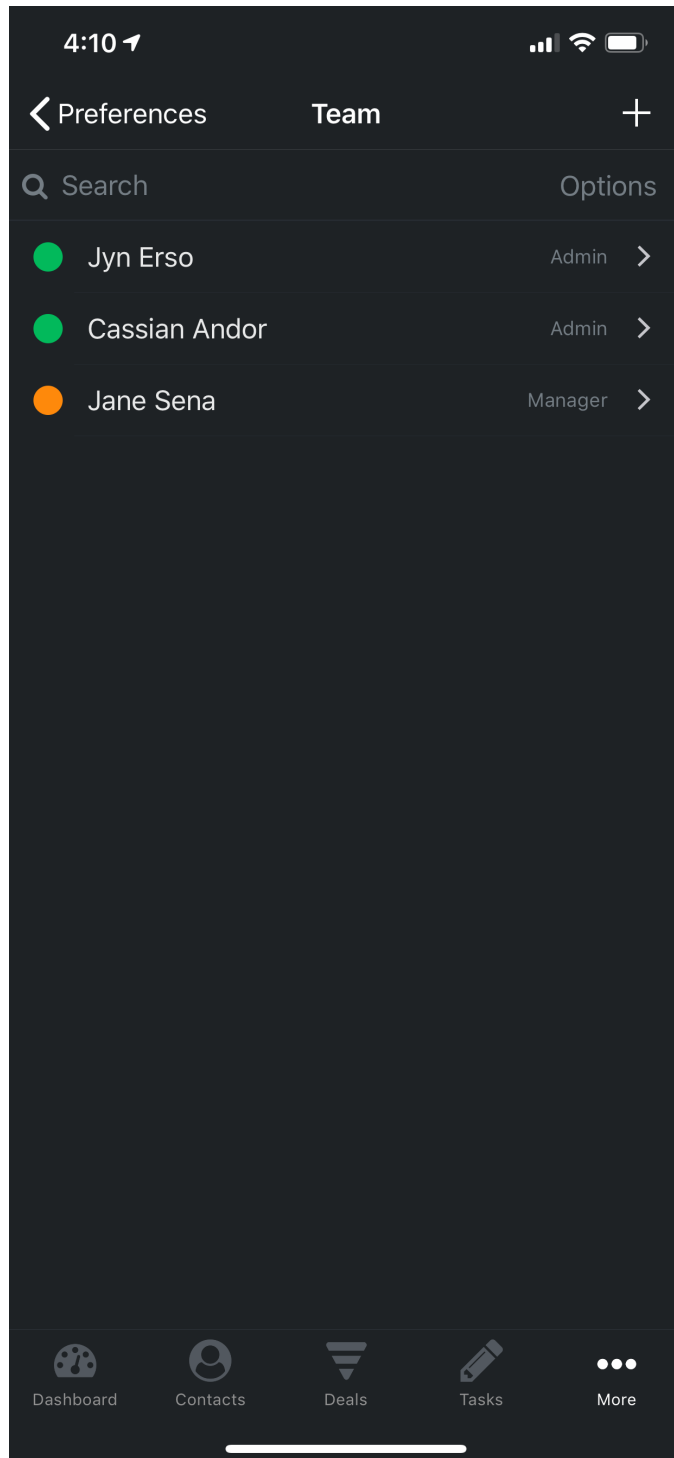


### Preference Seats

You are able to manage and add new seats for your users.

*Note: If you can not add a seat you will need to purchase additional seats for your account.*

## 21. Preferences: Manage Seats

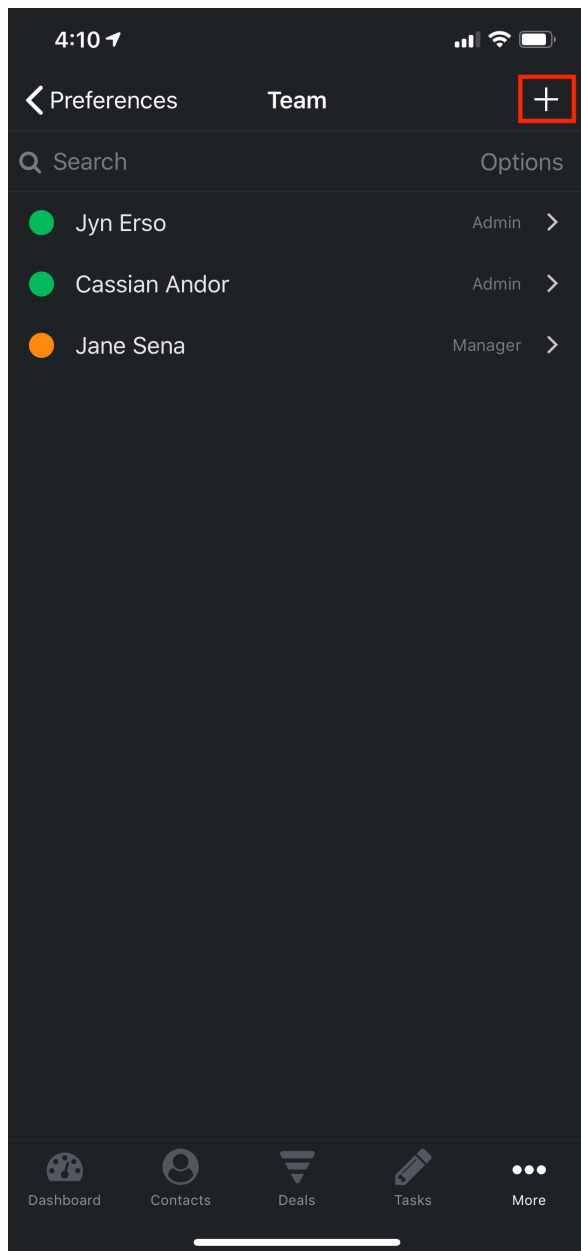


### Preference Manage Seats

You can manage your seat easy in our Seat Team list.

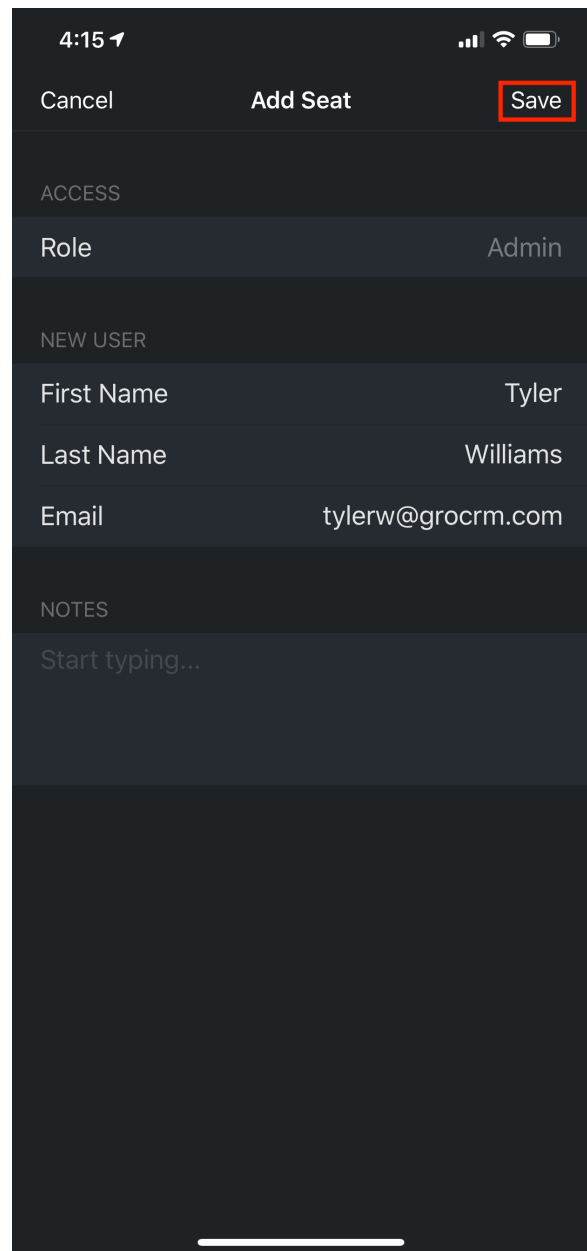


## 21. Preferences: Add Seats



### Preference Add Seats

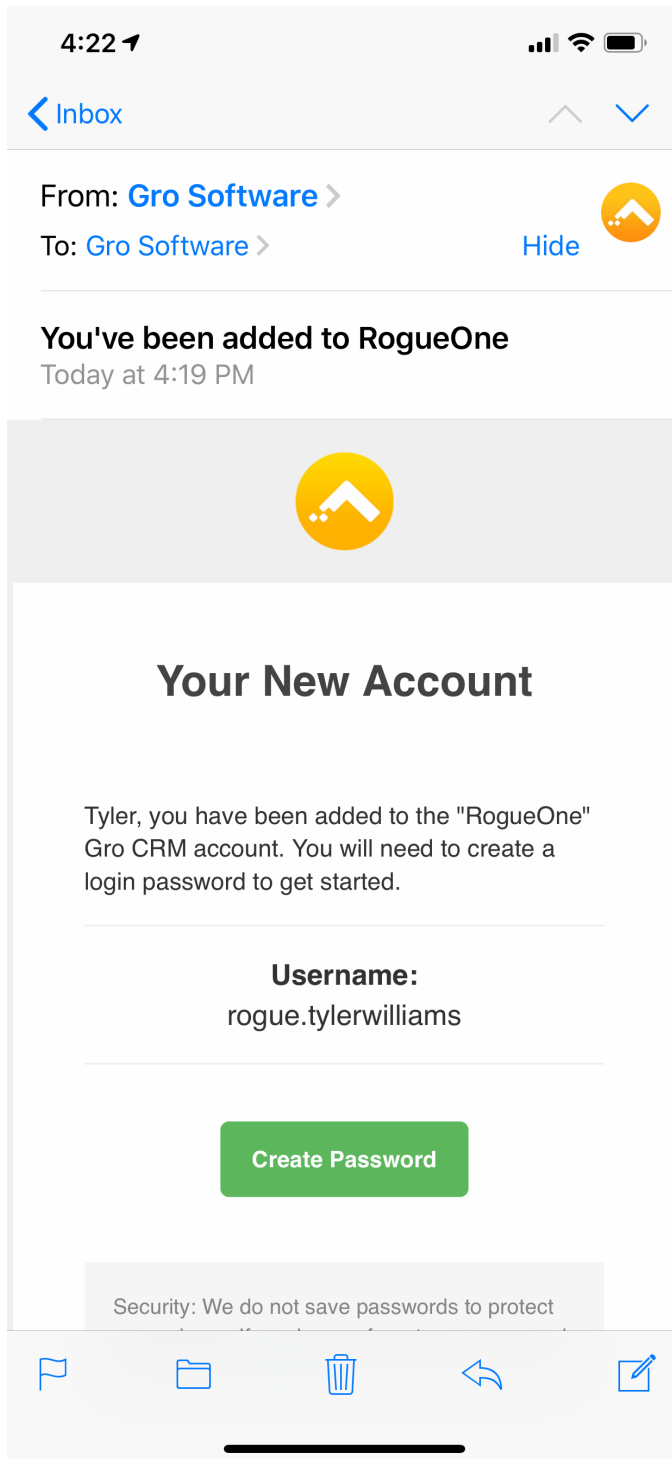
To add seats to your account just click the “+” button in the top right.



### Preference Create User

To add a new users just fill in the following information. Make sure the email address is correct. This is where the login info will be sent.

## 21. Preferences: Seat Notification



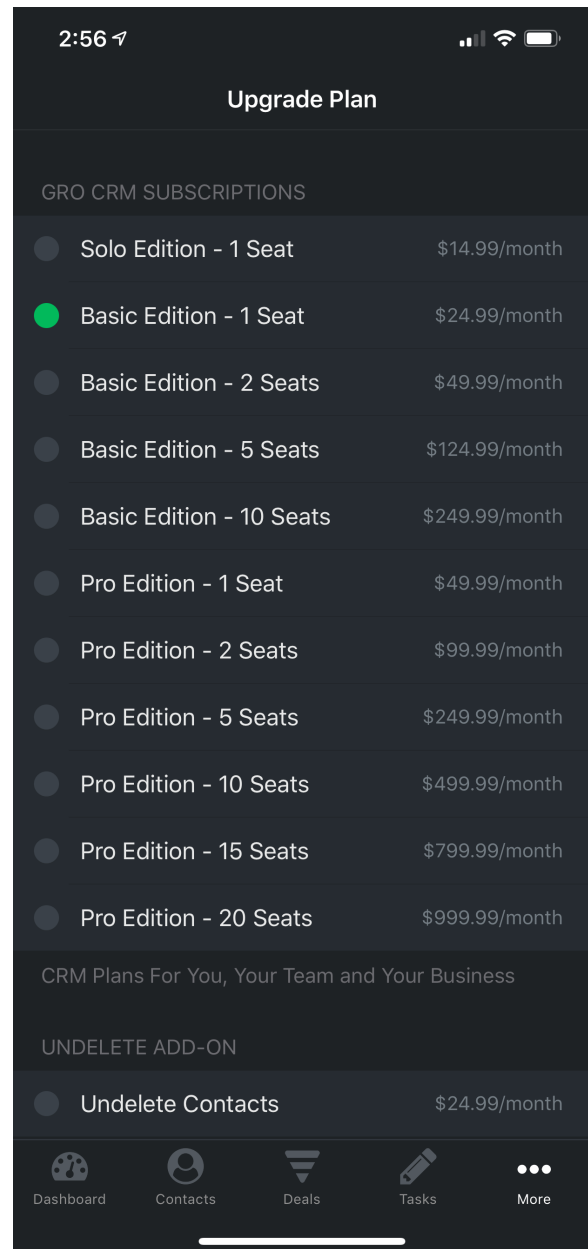
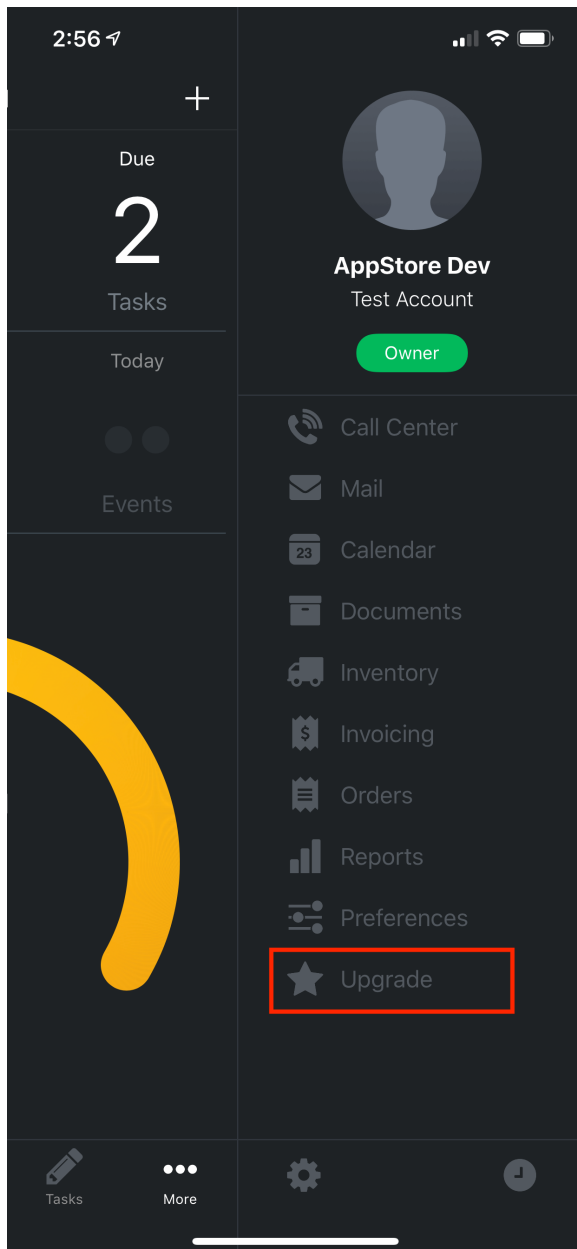
### Preference Seat Notification

An email will be sent to the "Email" address you added for your new users.

The email your new users will receive will contact the following:

- The account they were added to
- Their new login username
- A button to create a password.

## 21. Preferences: Purchase More Seats (in-app)




### Purchase More Seats

You can purchase more seats if you have an in-app subscription. Just click the “Upgrade” button in the sidebar to take you to our upgrade screen. Just click the subscription would you like to upgrade to.

Note: Your current subscription(s) will have a green dot next to it.


*Example: If you are currently on “Basic Edition - 1 Seat” you could upgrade to “Basic Edition - 2 Seats” if you needed to add one more user to your account.*

## Preferences: Purchase More Seats (Website)

My Account Profile Support **Upgrade** Logout

### Upgrade

Upgrade your account



### Upgrade your account

#### Plans

You are already subscribed to Gro CRM via the Apple® App Store® (in-app purchase). If you would like to purchase additional seats, add-ons or upgrade edition you will need to upgrade your account.

*Learn more: [App Store FAQ.pdf](#)*

Monthly Billing

Pro Subscription

2

Coupon Code

☒

Undelete Add-on

☒

Business Card Scanner Add-on

☐

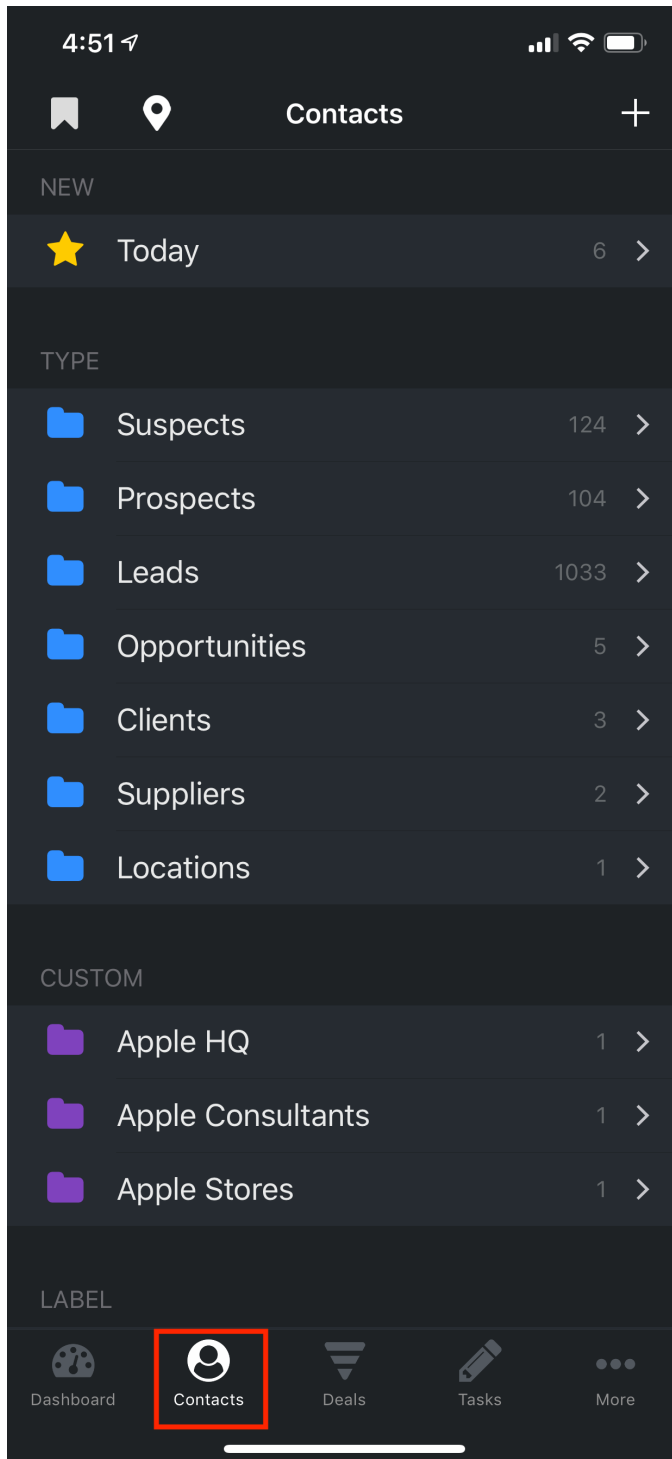
Data Backup Add-on

### Purchase More Seats

You can purchase more seats for your account by using our AMS (Account Management System). You can also upgrade your edition, and purchase add-on's.

Upgrade Your Account: <https://www.grocrm.com/account/>

## 22. Contacts

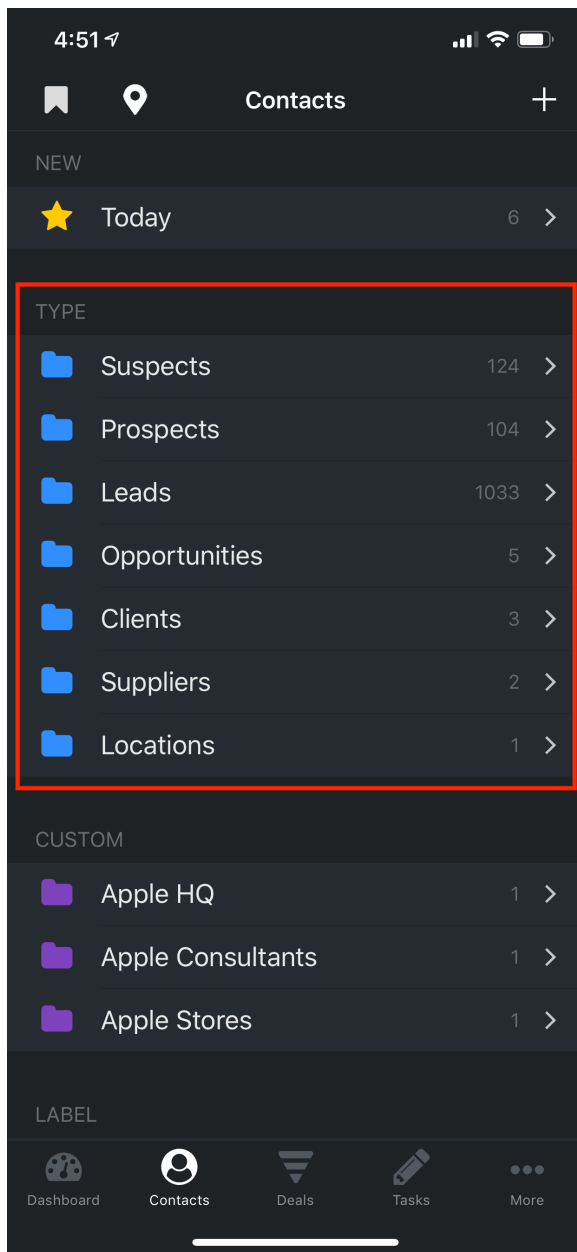


### Contact

You can categories your contacts and accounts by Type (as we discussed in Preferences section types are customizable if you would like to change them).

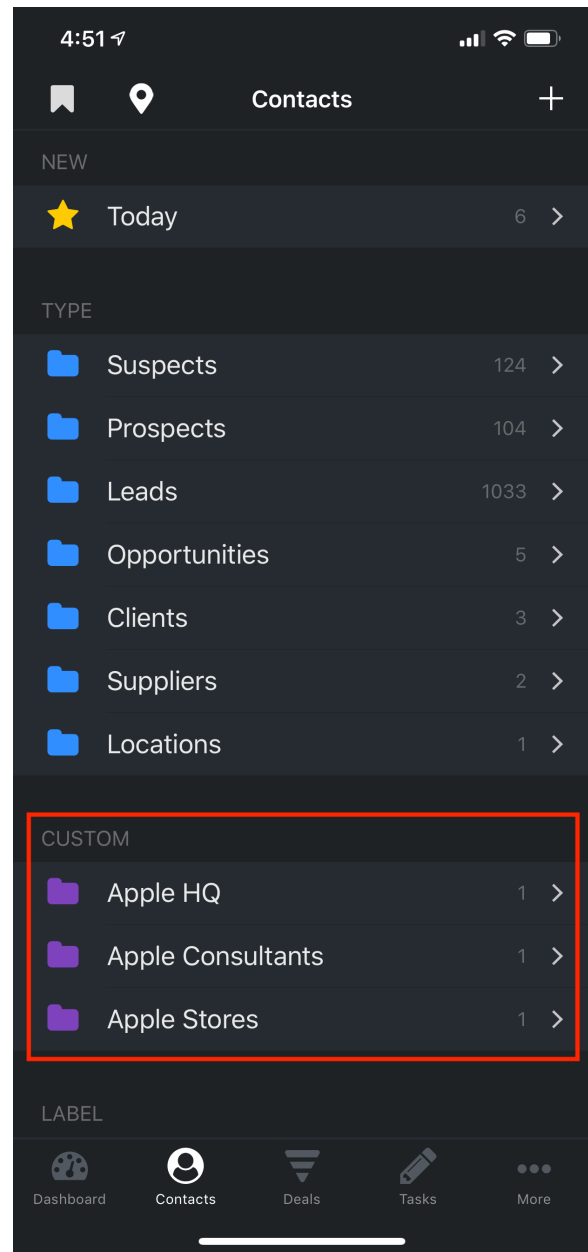
You can also look at just your Account (Business, Teams, Organizations) or Individuals (contacts).

## 22. Contacts: Types (Basic & Pro)



### Default Types

There are 7 default types that can not be change. You can however hide them. The contact counts are also displayed to the right of the name.

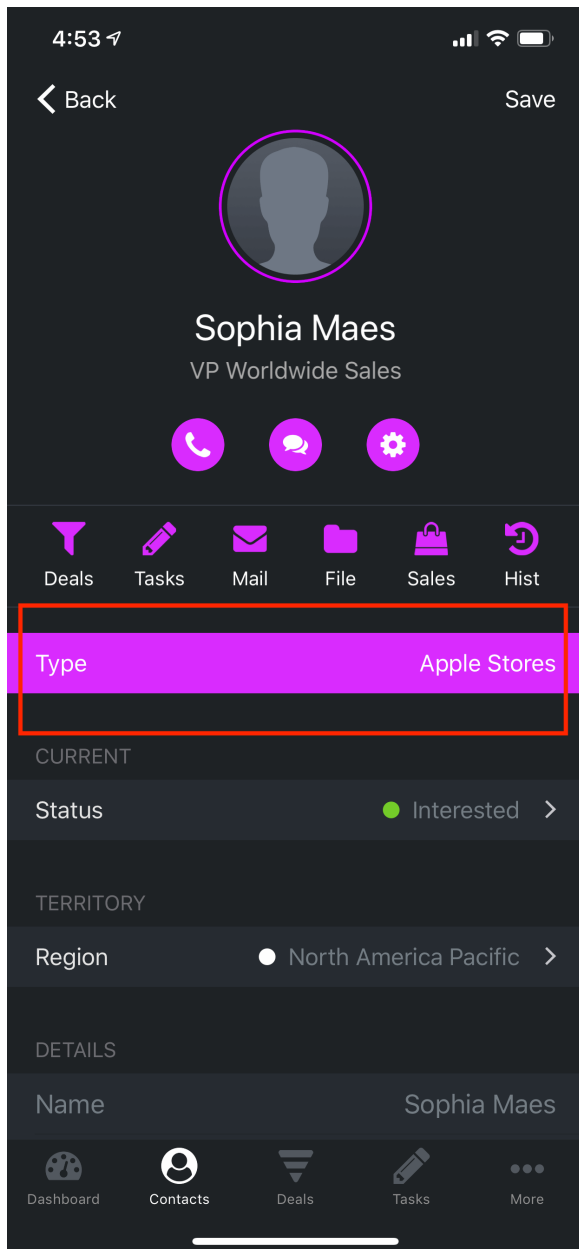


### Custom Types

You can create custom contact types for your business.

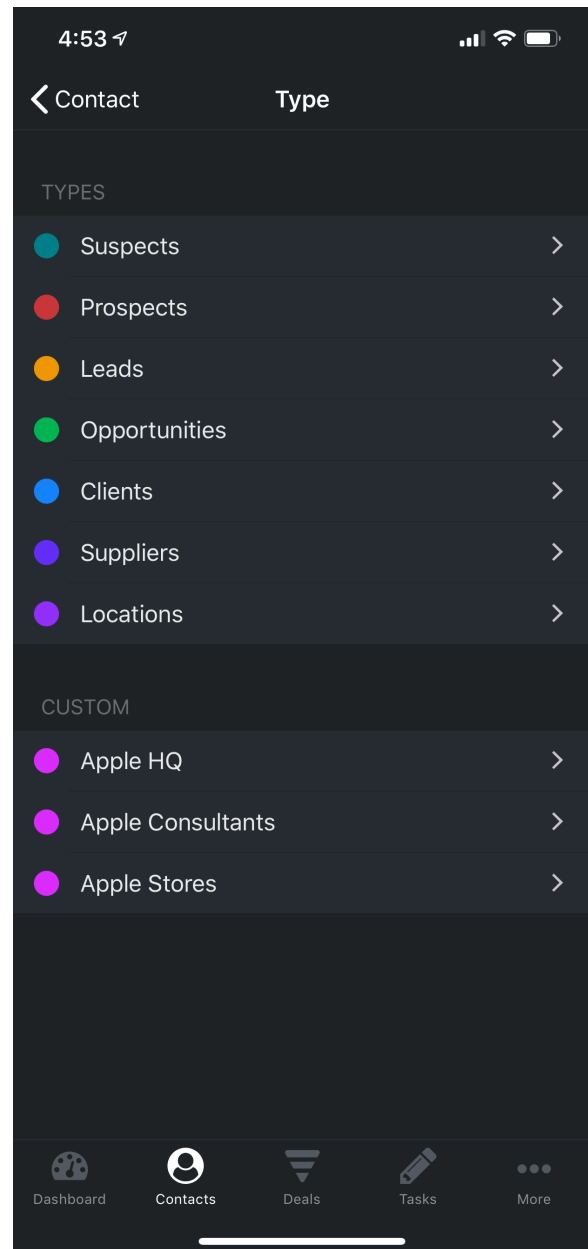
**\*\*Basic and Pro Edition Only\*\***

## 22. Contacts: Customize Types (Basic & Pro)



### Contact Type Selector

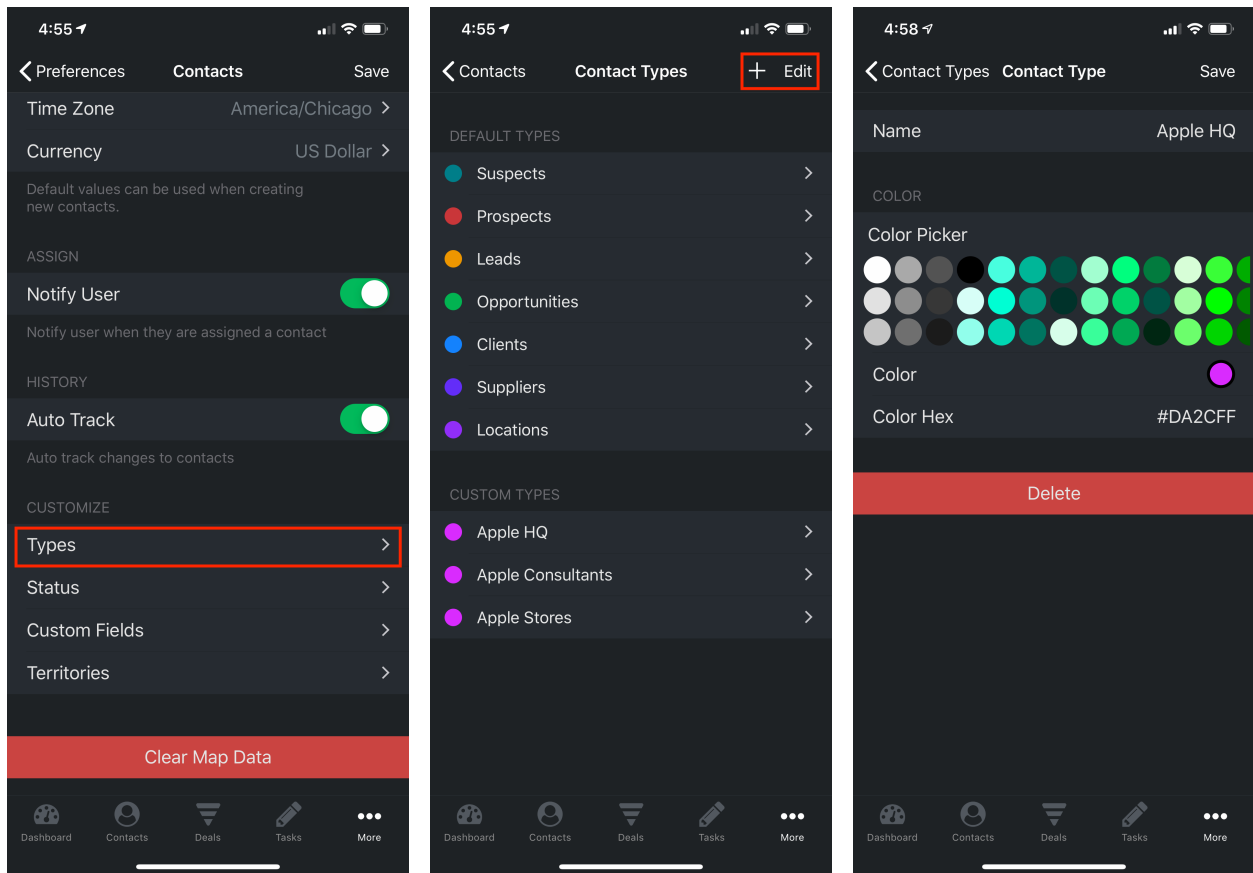
When viewing a contact detail record you can change the “Type” by pressing the colored Type bar.



### Select Types

You can change the Type of the contact by selecting the type you would like.

## 22. Contacts: Customize Types Prefs (Basic & Pro)



### Customize Contact Types

In Preferences -> Contacts you can customized the “Contact Types”. The first 7 types names \*Suspects, Prospects, Leads, Opportunities, Clients, Suppliers and Locations can not be deleted. You can however turn them off if you like.

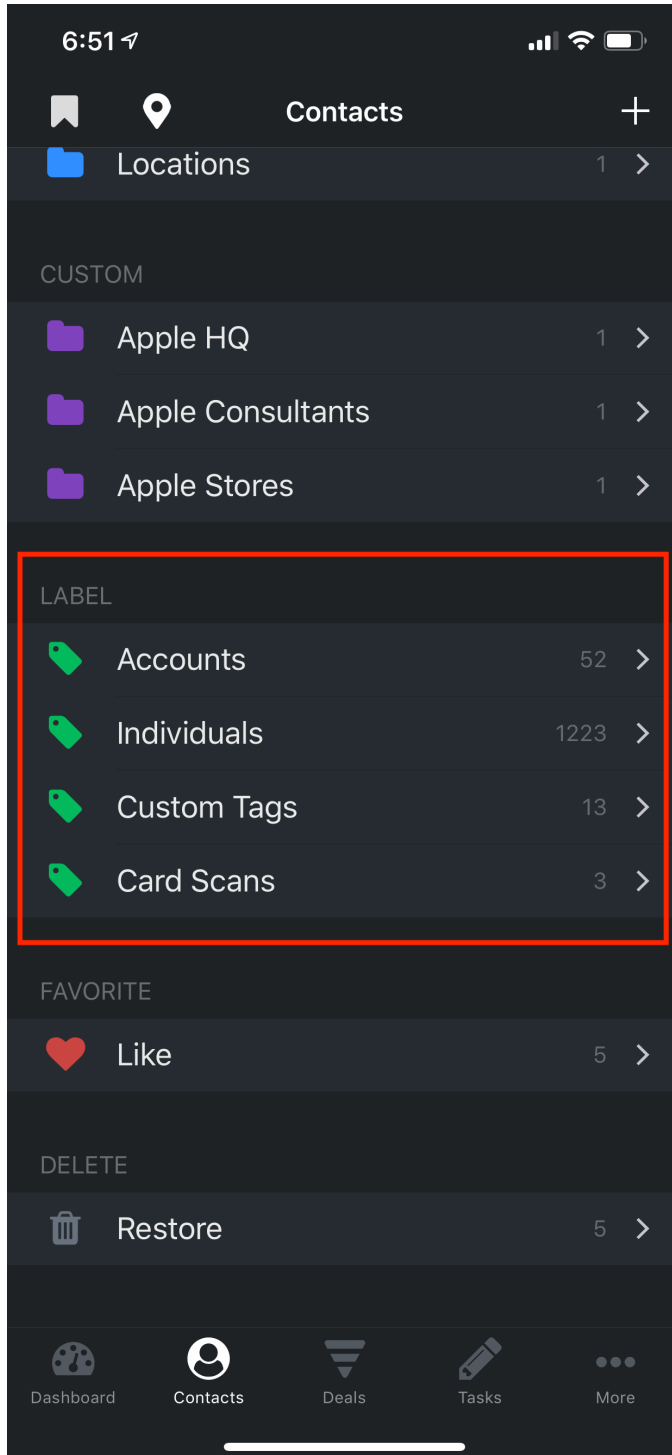
#### Notes:

- *Basic Edition can create up to 5 custom contact type folders*
- *Pro Edition can create up to 20 custom contact type folders*

**\*\*Basic and Pro Edition Only\*\***



## 22. Contacts: Labels

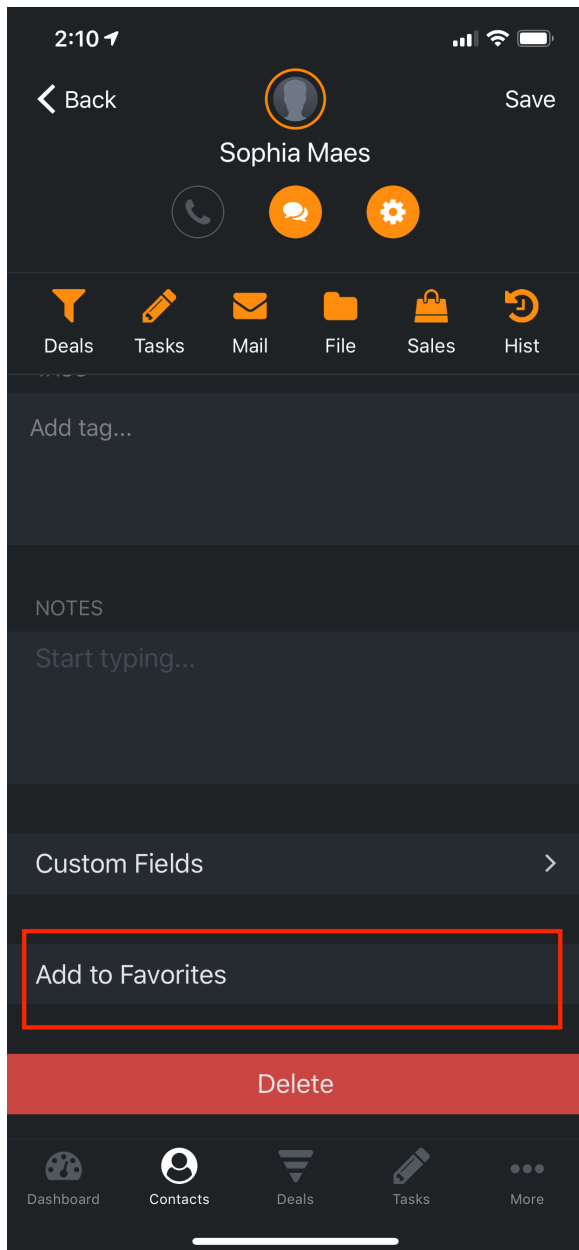


### Contact Labels

These static labels allow to view sets of contact groups such as “All”, “Accounts” and more.

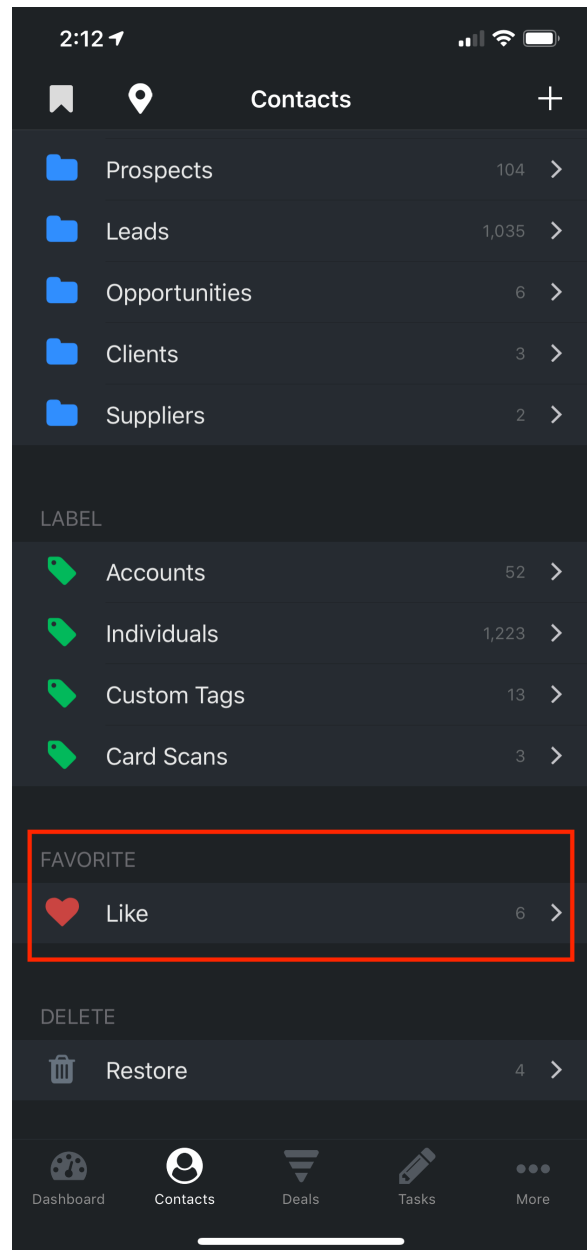
There are some dynamic contact labels that will appear if you have an add-on turned on such as our Business Card Scanner.

## 22. Contacts: Favorites



### Contact Detail Add To Favorite

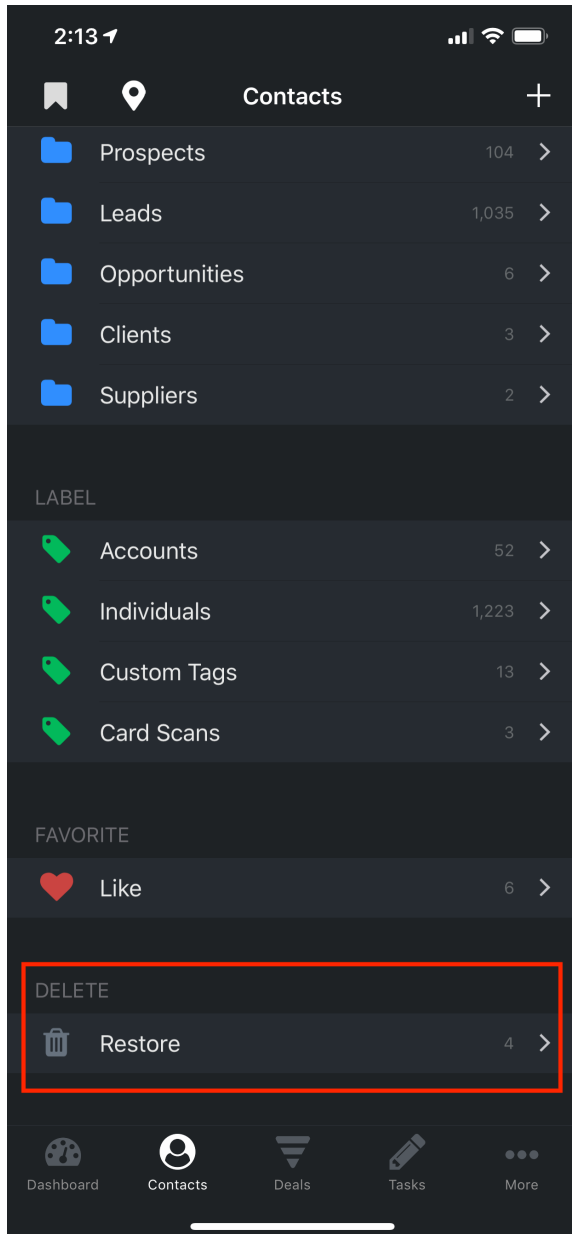
When you are viewing a contact detail record you can “Add to Favorites”



### View Favorite Contacts

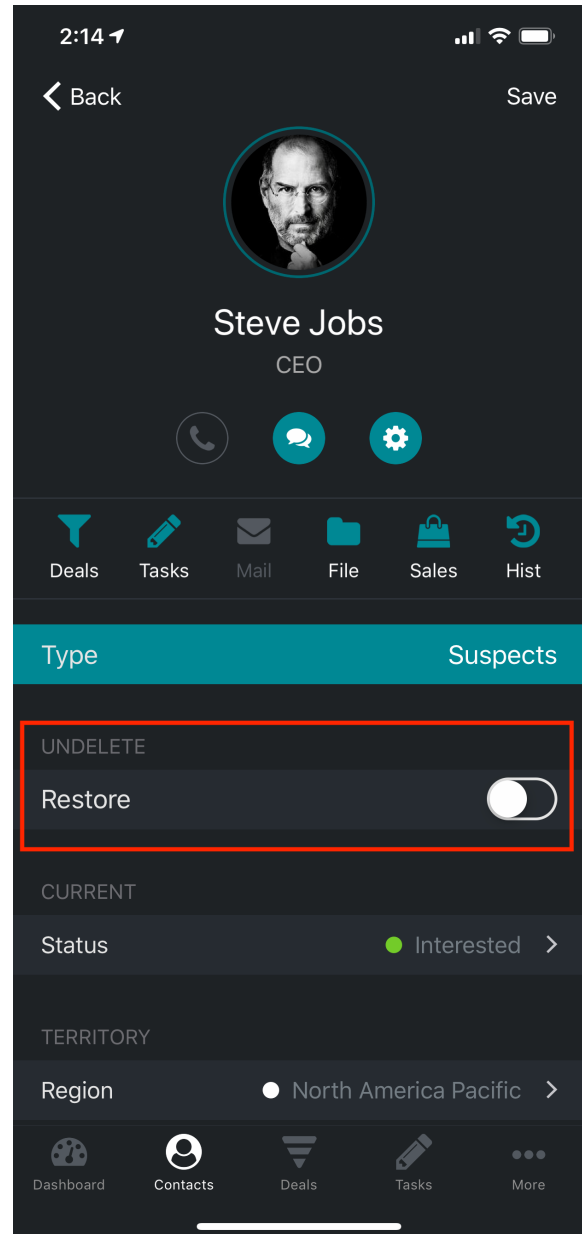
To view all your favorite contacts that you liked just click the “Like” Type in Contacts.

## 22. Contacts: Undelete (Add-On)



### Deleted Contacts

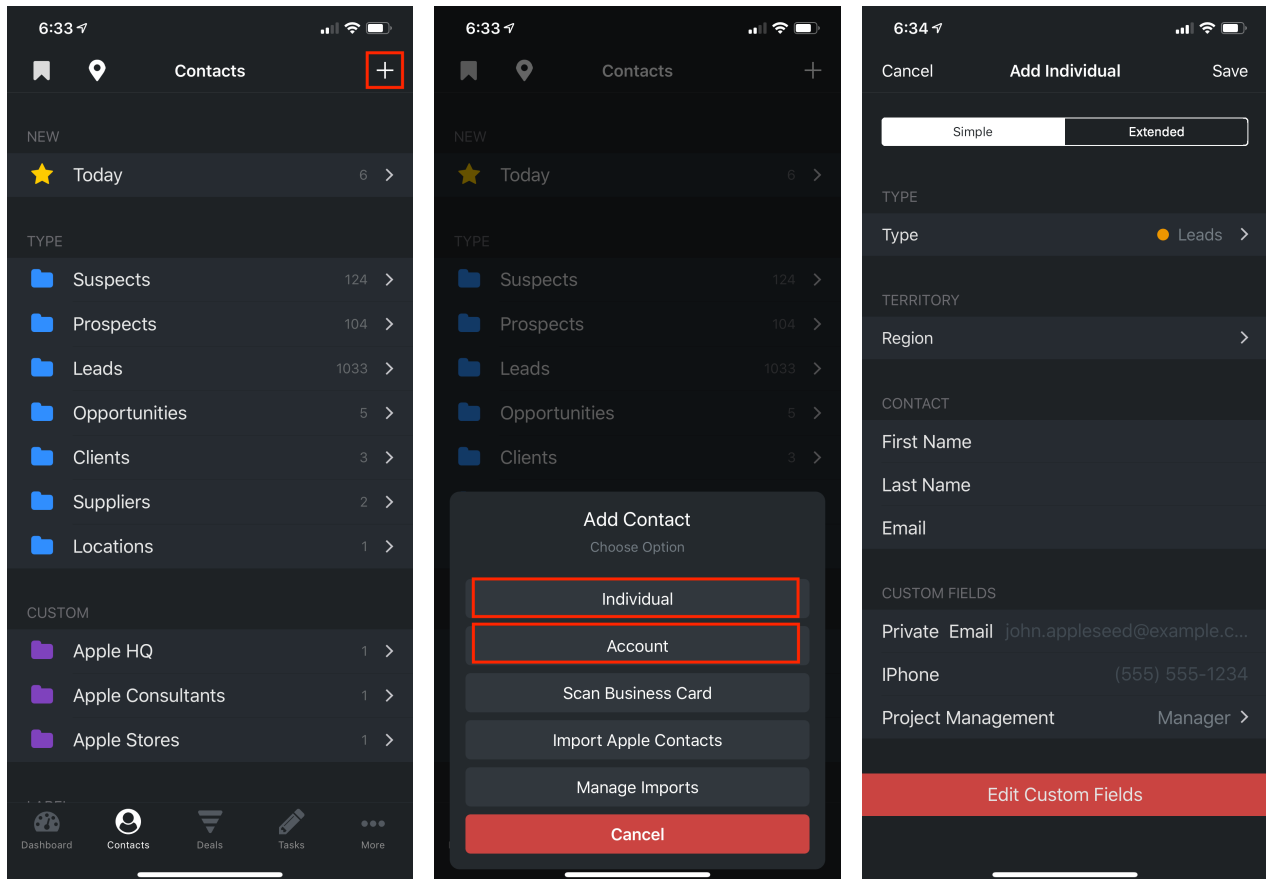
If you have the “Undelete” add-on activated. You can view your deleted contacts.



### Restore Deleted Contacts

To “Restore” a contact just slide the switch and “Save” If you delete a “Deleted Contact” it will be permanently deleted forever.

## 22. Contacts: Add Contacts and Accounts

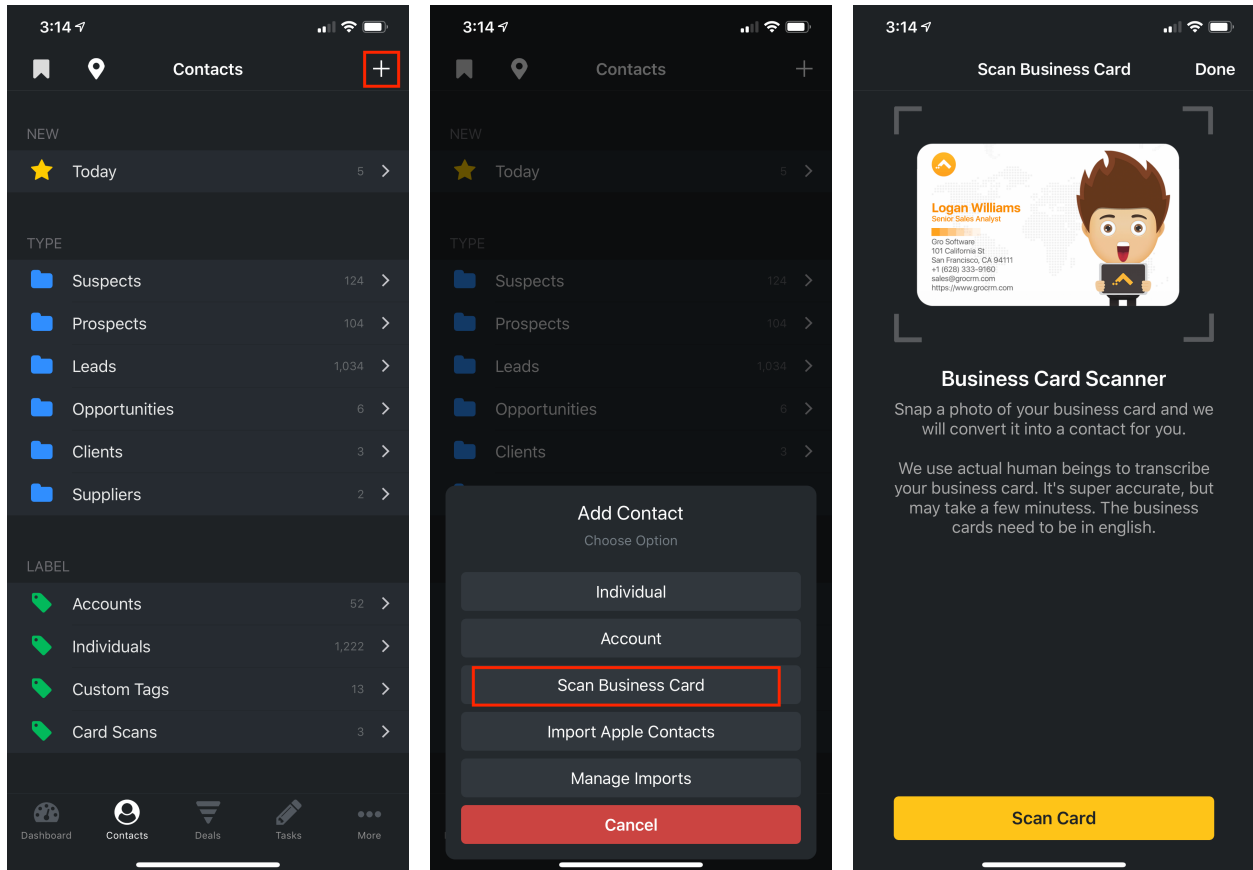


### Add Contacts and Accounts

To Add Contacts, Accounts just click the “+” button in the top right corner “Contacts”. You will be presented with a dialog with some options.

When adding “individual” and “Account” Contacts you have two options for adding “Simple” and “Extended”. The simple options is the bare minimum amount of information required to add a contact. The Extended option allows more details to be entered. One the contact has been added you can additional information in the contact detail.

## 22. Contacts: Scan Business Cards (Add-On)



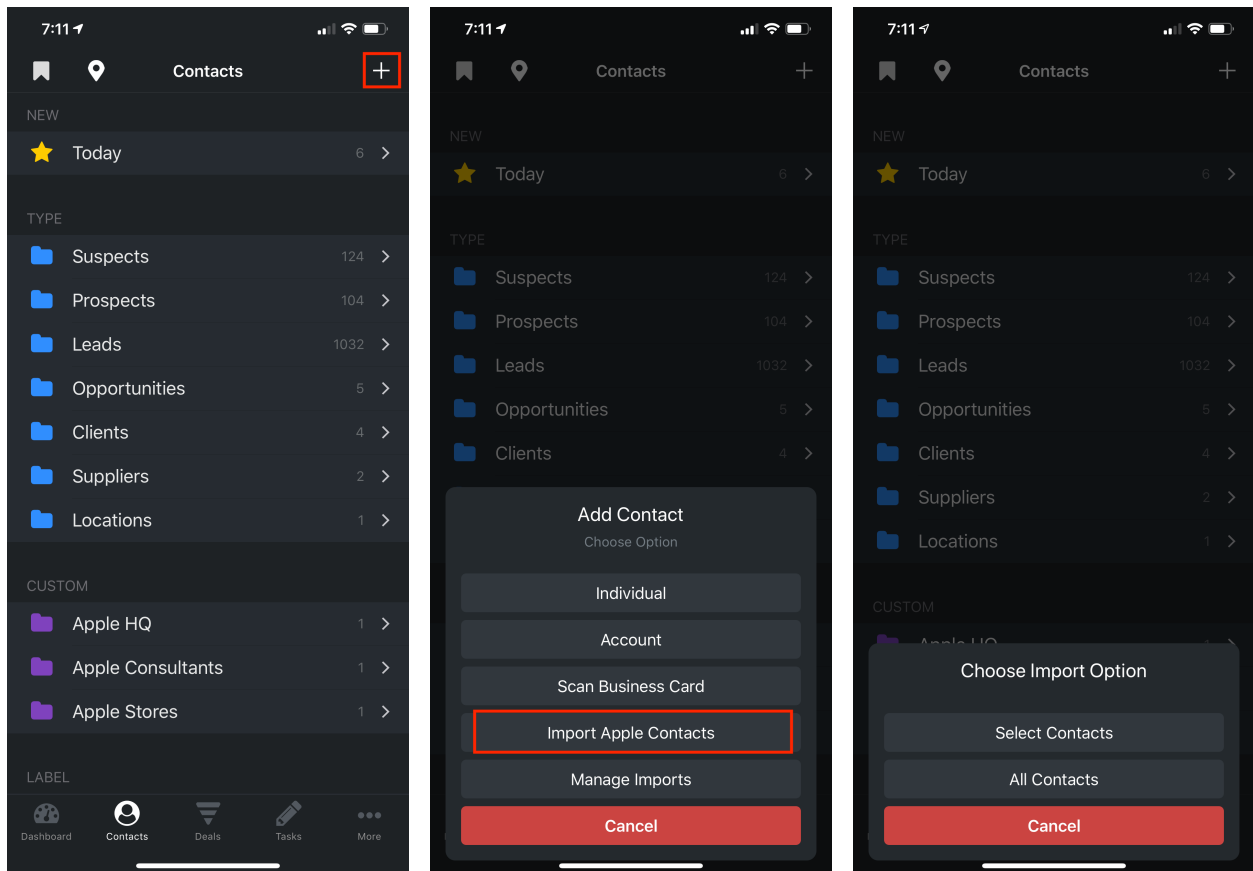
### Scan Business Cards (Add-on)

With the Gro CRM business card scanner, you can take a photo of a business card and the card information will be inserted into your Gro CRM contacts within just a few minutes! We use real people, not machines, to transcribe business cards. You will get the most accurate and complete data every time with Gro CRM.

Salespeople, small business and individuals are going to love how much time this add-on will save them. No more losing business cards, or forgetting to enter them into your CRM at the end of the day! When you get a new business card just scan it right away and your new lead information will be saved into your Gro CRM contacts.

**Note:** We also save the original photo of your business card so you can view it later. This is a really nice little feature.

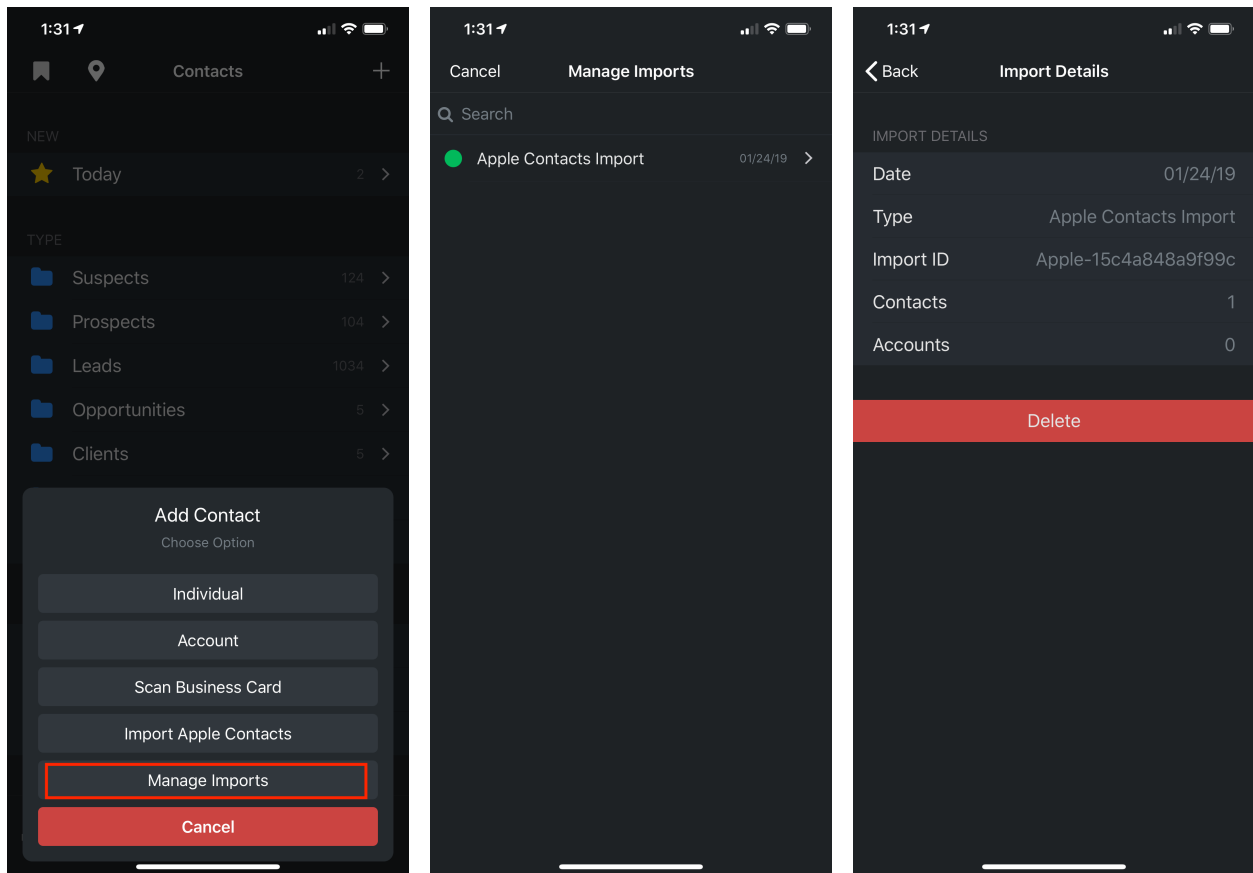
## 22. Contact: Import Apple Contacts



### Import Your Apple Contacts

To Import your Apple contact just click the “+” button in the top right corner of “Contacts”. You will be presented with a dialog with some options. You will want to select “Import Apple Contacts”. Then you will have the option to import “All” your Apple Contacts” or just select the Apple contacts you would like to import.

## 22. Contacts: Manage Imports

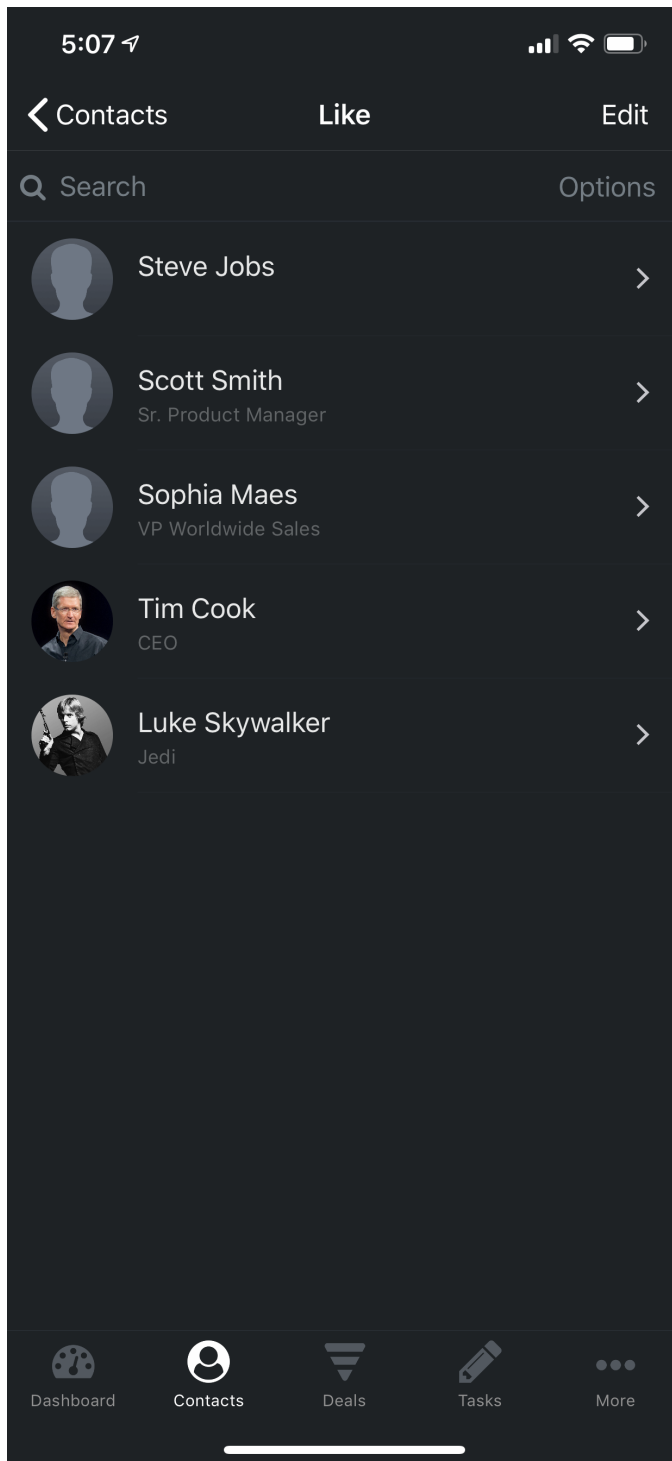


### Manage Imports

If you have either imported “Apple Contacts” or Spreadsheet .CSV data with our Account Management System (AMS) you are able to manage and delete those imports.

In the import details you can see how many “Contacts” and “Accounts” were created for this specific import.

## 22. Contacts: List View



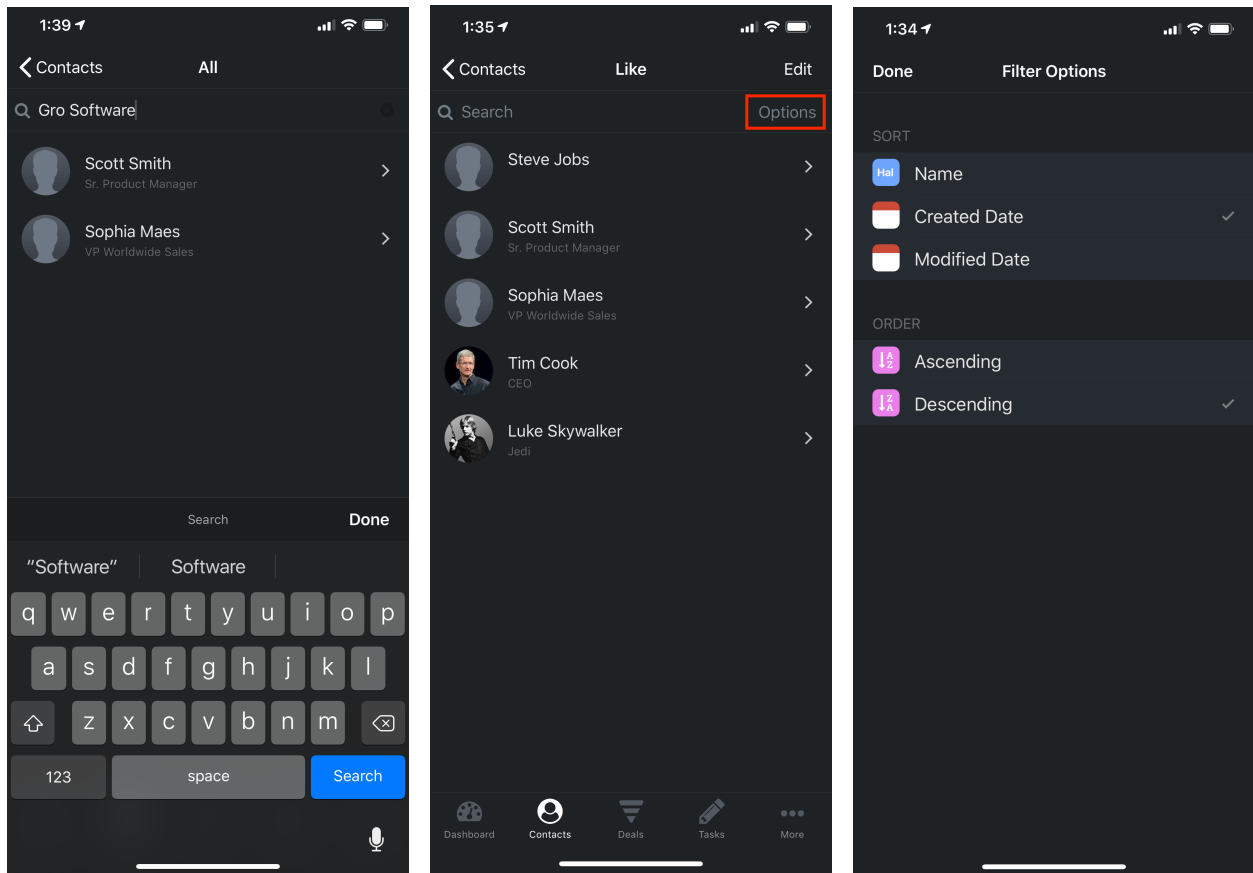
### Contact List

View your contacts with images next to them or a more simple version without images.

*Note: To turn of contact images in the contact list go to: Preferences->Contacts*



## 22. Contacts: Searching



### Contact Searching

We search on the following items in the search field. (First Name, Last Name, Title and Email)

*Tip: Want to find all the CEO? Just type CEO and the search will check the title field for all contacts that match CEO in the title field.*

*Note: You can also click "options" in the search bar to filter the contact list.*

## 22. Contacts: Detail View

1:20

< Back

Save

**Sophia Maes**  
VP Worldwide Sales

Deals Tasks Mail File Sales Hist

Type Clients

CURRENT

Status Interested >

TERRITORY

Region North America Pacific >

DETAILS

Name Sophia Maes

Dashboard Contacts Deals Tasks More

### Contact Details

Contact Details is where you store and manage all your contact data.

#### Type:

You can assign a default type such as:

- Suspect
- Prospect
- Lead
- Opportunity
- Client
- Supplier

We also allow you to create custom types for your line of business (Basic and Pro only)

#### Status:

You can assign a status to your contact. The default values are:

- Interested
- Not Interested
- Revisit

We also allow you to create custom Status (Basic and Pro only)

#### Region:

You can assign a territory or region to a user (Pro only)

## 22. Contacts: Detail View (Fields)

1:18

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Sophia Maes

Deals

Tasks

Mail

File

Sales

Hist

USER

Assigned To

Cassian Andor

CLASSIFICATION

Label

Contact

DEFINE

Source

Select >

Industry

Select >

Role

Select >

GRADE

Rating

Select

Score

Select

Dashboard

Contacts

Deals

Tasks

More

### Contact Fields

#### Assigned To:

You can assign a user to your contact.

#### Label:

Either a Contact or and Account (non modifiable)

#### Define:

- Source (Example: Referral)
- Industry (Example: Sales)
- Role (Example: Decision Maker)

Note: These options change based on individual vs account. They also change for Prospect vs lead.

#### Grade

- Rating (Example: Hot)
- Score (Value 10-100)

## 22. Contacts: Detail View (Fields)

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PRIMARY CONTACT

Title

VP Worldwide Sales

Department

Sales

Reports to

First Name

Sophia

Last Name

Maes

Date of birth

Age

Date of birth not set

ASSISTANT

Name

Phone

Email

Dashboard

Contacts

Deals

Tasks

More

### Contact Fields

#### Primary Contact:

- Title (Example: COO)
- Dept (Example: Management)
- Reports To: Example: Steve)
- First Name (Example: Tim)
- Last Name (Example: Cook)
- Date of Birth (Example: 11/1/60)
- Age (auto fills in when you set the date of birth Example: 58 years old)

#### Assistant:

- Name (Example: Jane)
- Phone (Example: 555-555-5555)
- Email (Example: jane@test.com)

## 22. Contacts: Detail View (Fields)

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Deals Tasks Mail File Sales Hist

COMMUNICATION

Work (628) 333-9160

Home

Mobile (628) 333-9160

Fax

Message 6283339160

FaceTime

Email sophiam@grocrm.com

Website

SOCIAL

Facebook

Twitter

Dashboard Contacts Deals Tasks More

### Contact Fields

#### Communication:

- Work Phone
- Home Phone
- Mobile Phone
- Fax
- Message
- Facetime
- Email
- Website

If you fill in these numbers we allow you to create calls, messages and FaceTime calls, etc through the system.

#### Social:

- Facebook
- Twitter
- Linkedin

## 22. Contacts: Detail View (Fields)

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USER

Assigned To

Cassian Andor

CLASSIFICATION

Label

Contact

DEFINE

Source

Select >

Industry

Select >

Role

Select >

GRADE

Rating

Select

Score

Select

Dashboard

Contacts

Deals

Tasks

More

### Fields

#### Assigned To:

You can assign a user to your contact.

#### Label:

Either a Contact or and Account  
(non modifiable)

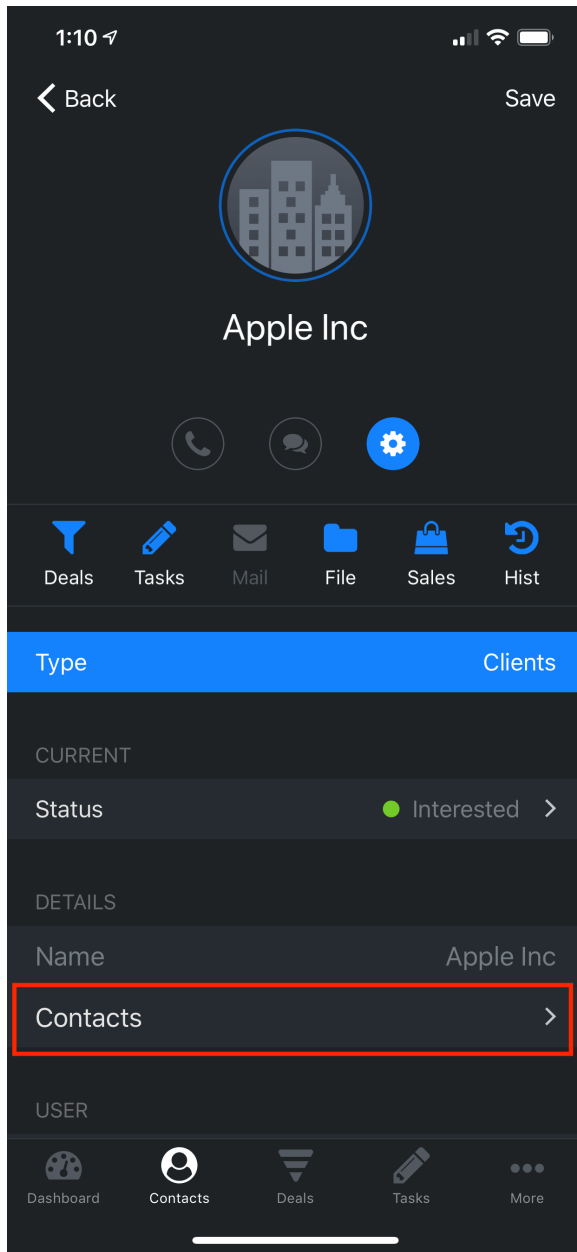
#### Define:

- Source (Example: Referral)
- Industry (Example: Sales)
- Role (Example: Decision Maker)

#### Grade

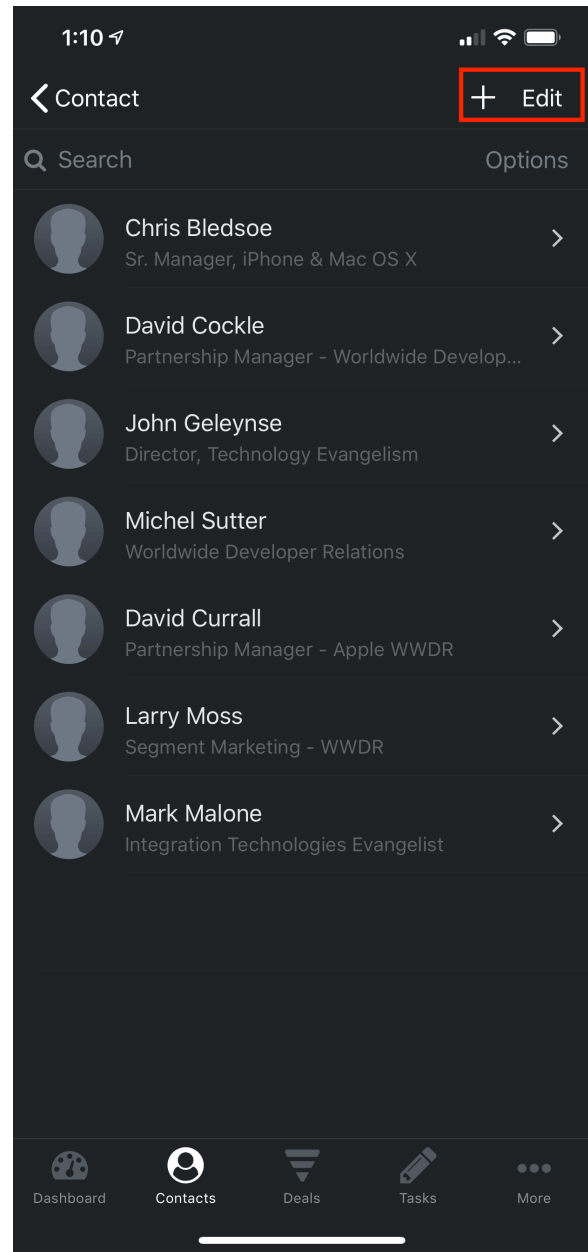
- Rating (Example: Hot)
- Score (Value 10-100)

## 22. Contacts: Detail View (Add Account to Contacts)



### Attach Contacts to Account

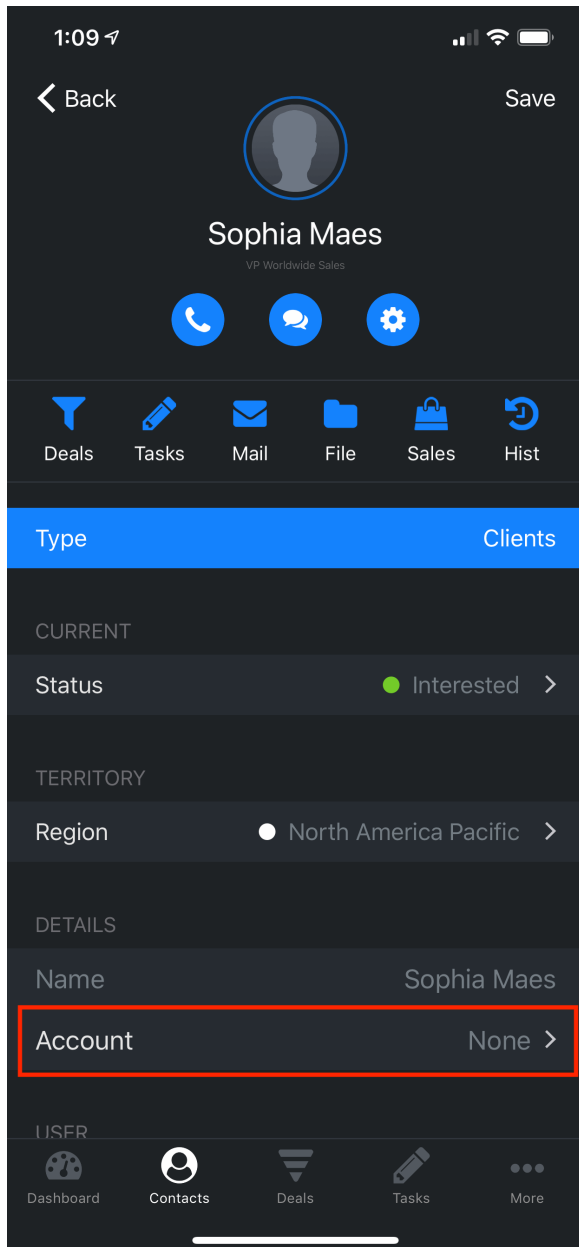
You can add your contacts to an existing Account.



### Attach Contacts to Account

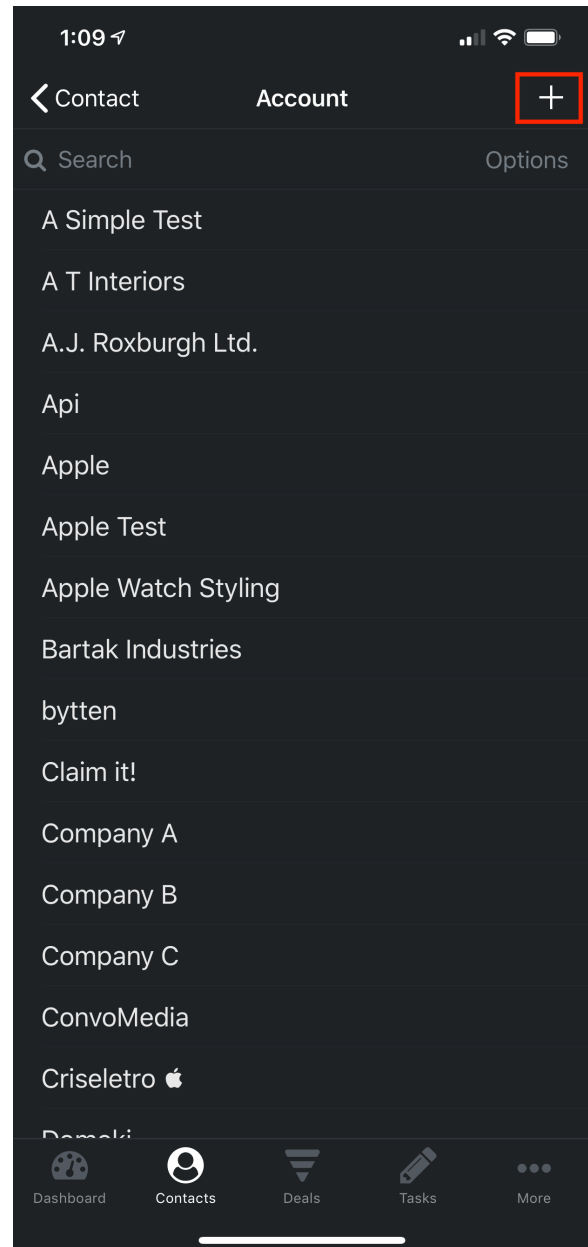
Select and exiting contact or create a new one with the add “+” button

## 22. Contacts: Detail View (Add Contacts To Account)



### Attach Contacts to Account

You can add your contact to an Account.

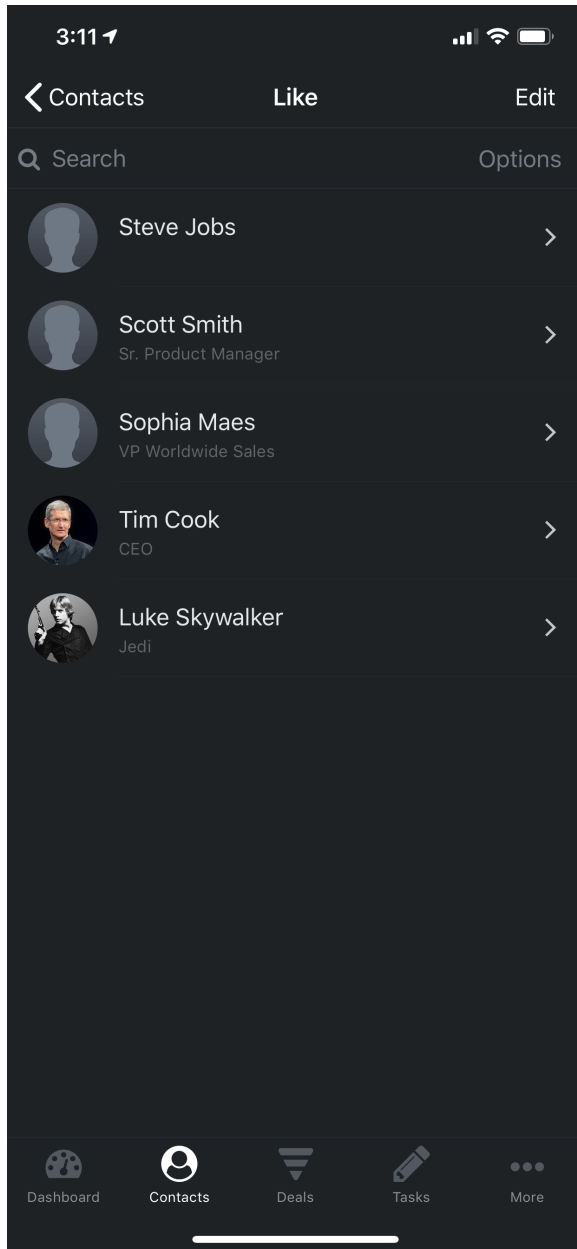


### Accounts

Select an existing Account or create a new one with the add "+" button

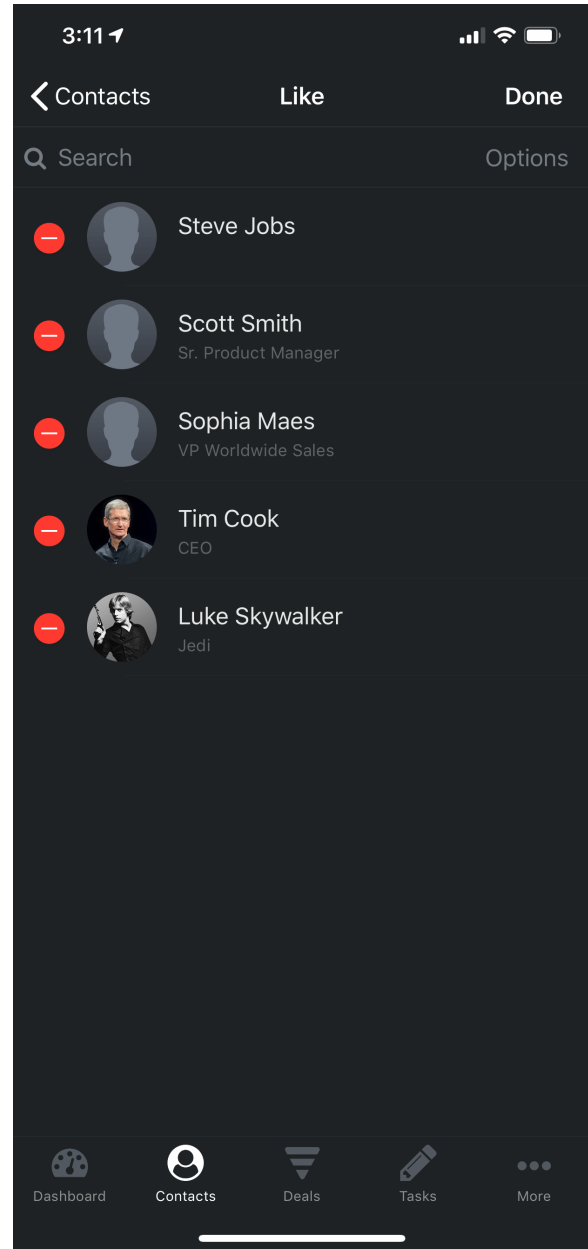


## 22. Contacts: Delete Contacts - List View



### Contact List View Delete

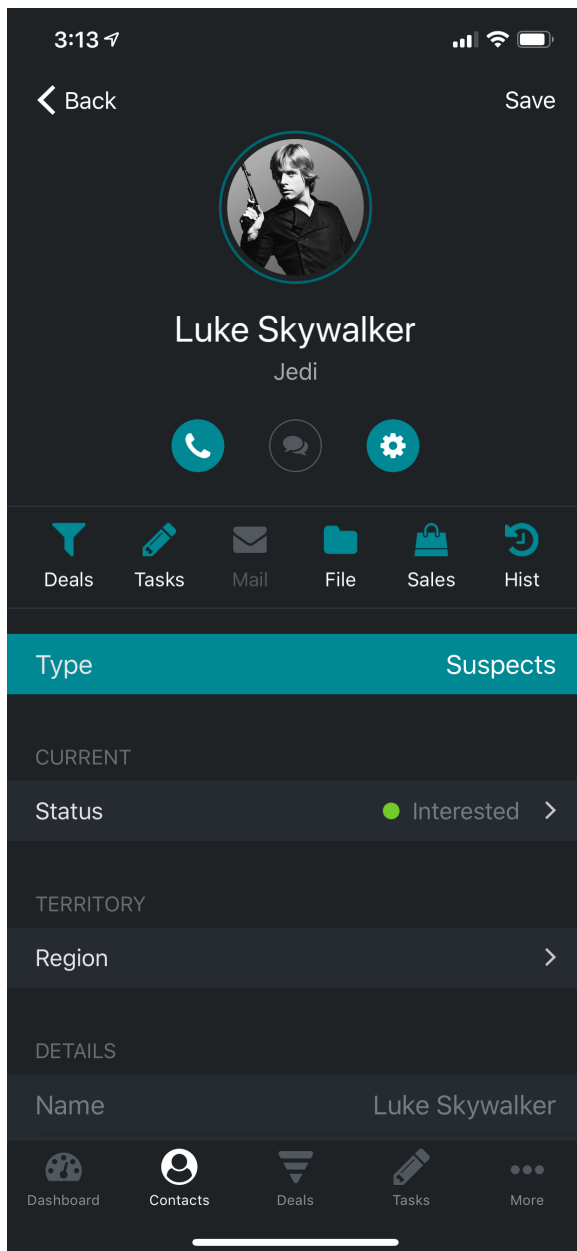
Click the “Edit” button to have the ability to delete contacts in list view.



### Delete Contacts

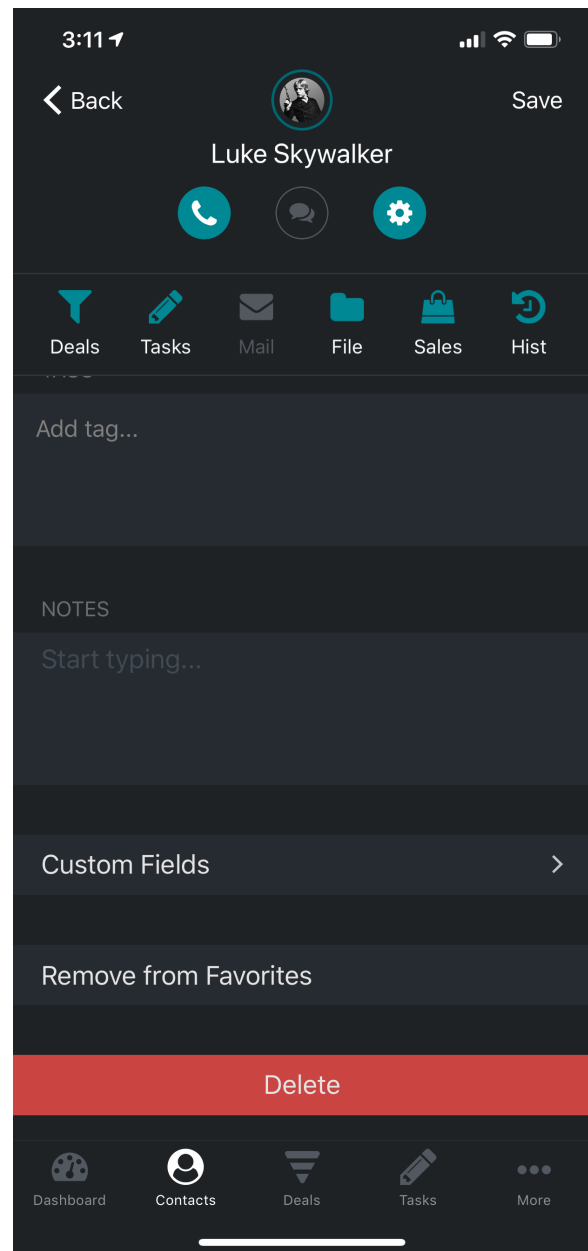
Click the red “-” button and click done when you are completed.

## 22. Contacts: Delete Contacts - Detail View



### Contact Detail View Delete

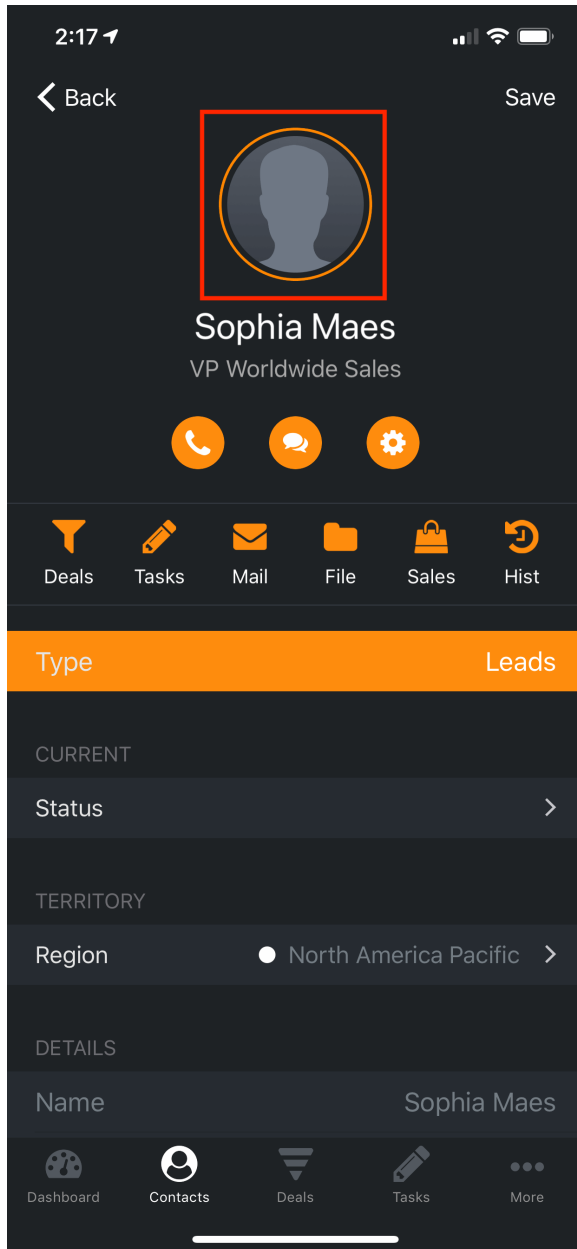
In the detail page of a contact if you scroll to the bottom of the record will see a red “Delete” button.



### Delete Contacts

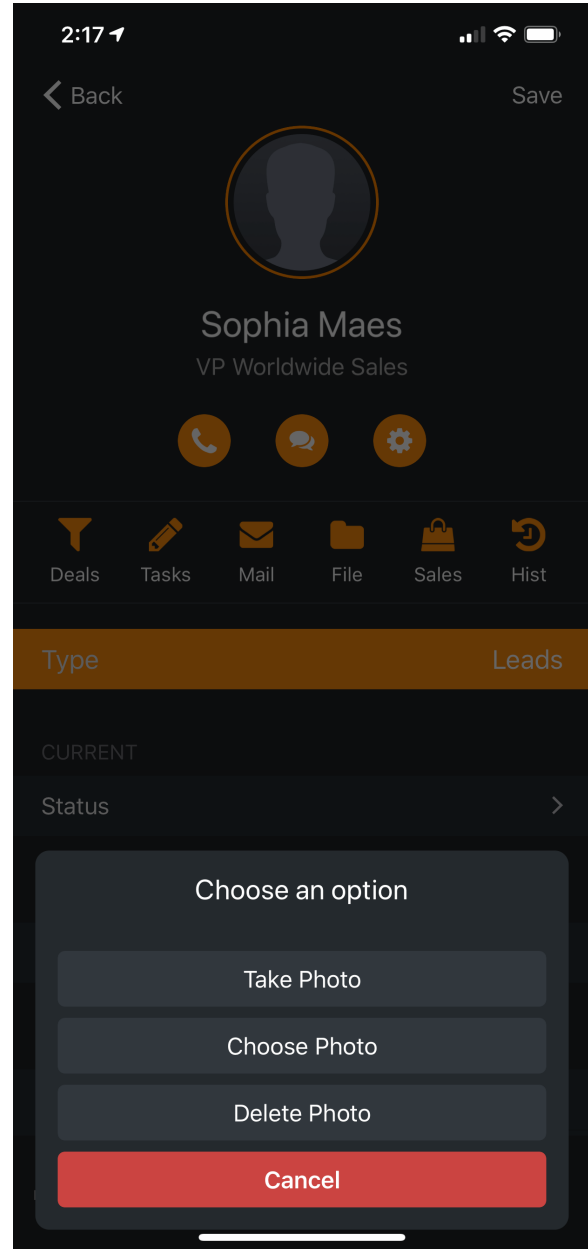
Click the red “Delete” button to delete a contact.

## 22. Contacts: Add Contact Images



### Contact Profile Image

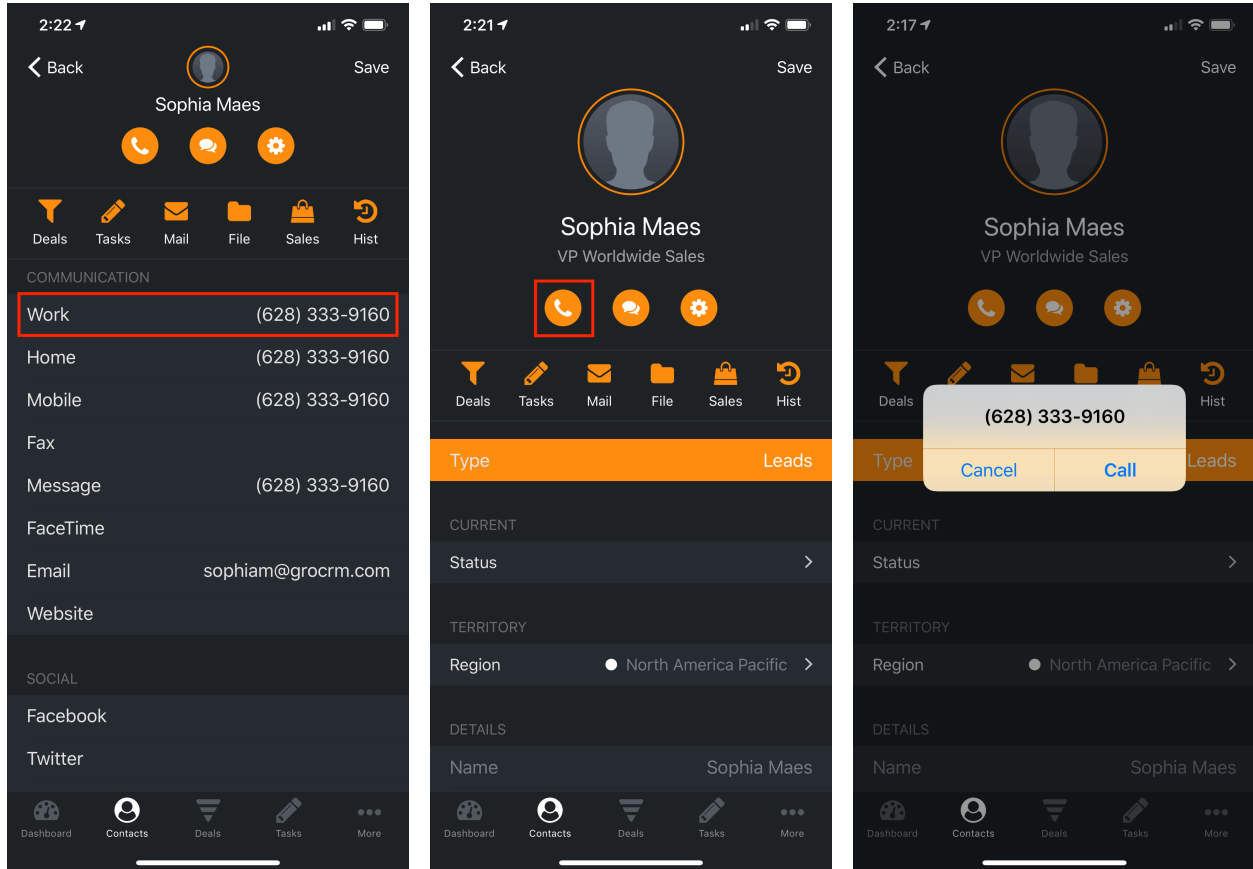
Tap on the profile image where you see a ring around the profile to have the option to add or delete and image.



### Add Profile Image

You are able to add a phone from your camera or photo album. You are also able to delete a phone.

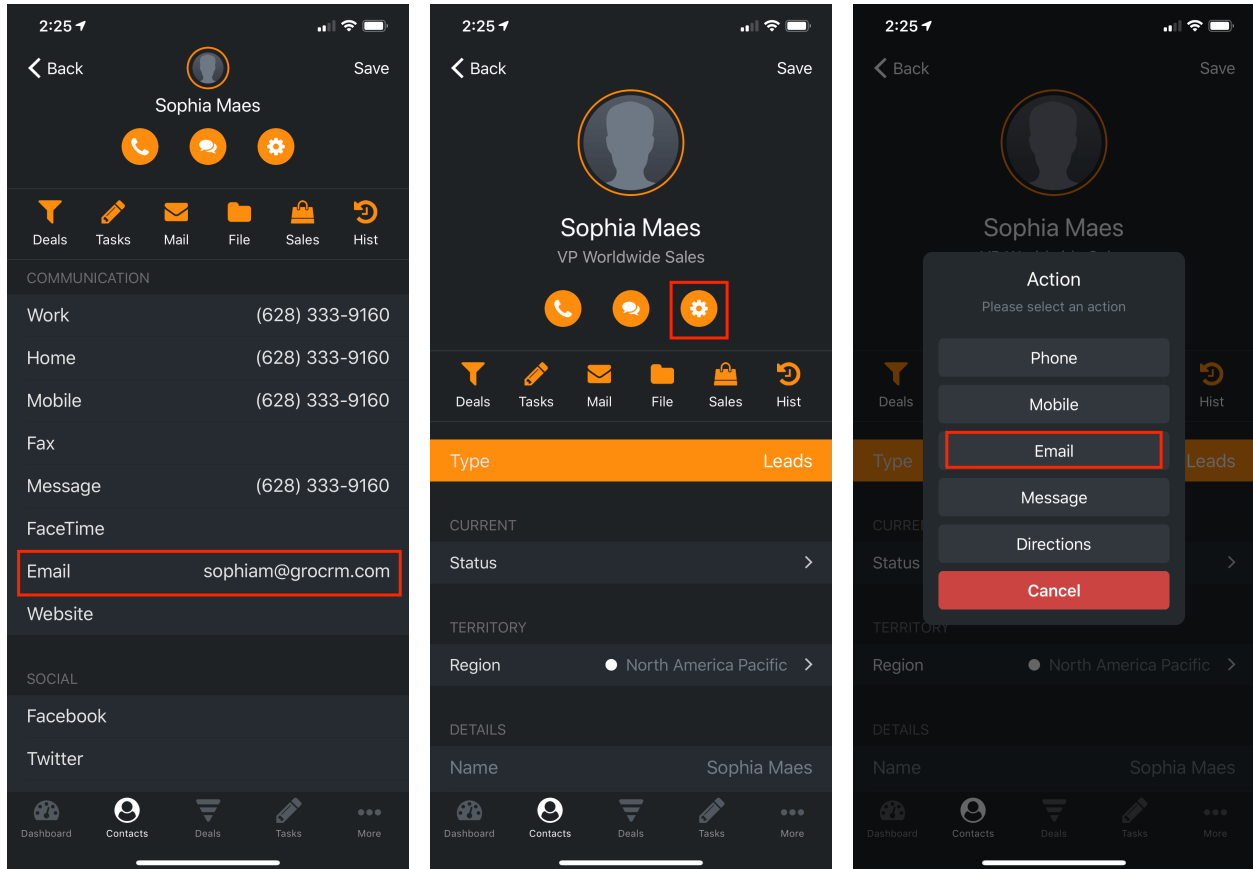
## 22. Contacts: Call Contact



### Call Contacts

In your Contacts detail record if you have “Work” phone filled in, the header button on the top of the record will turn on.

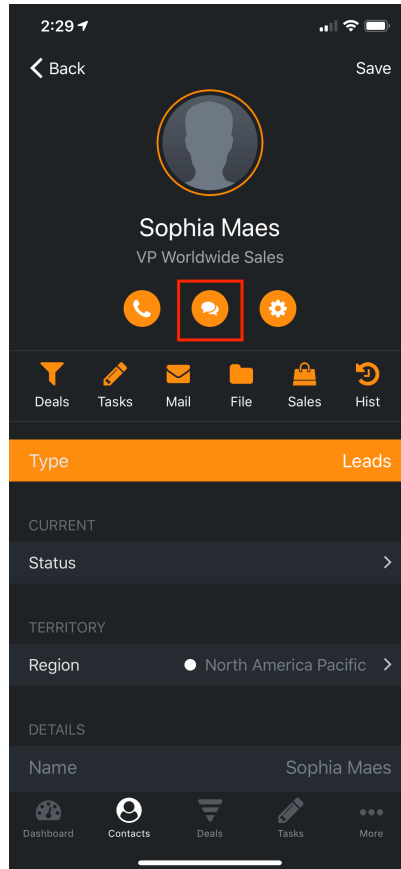
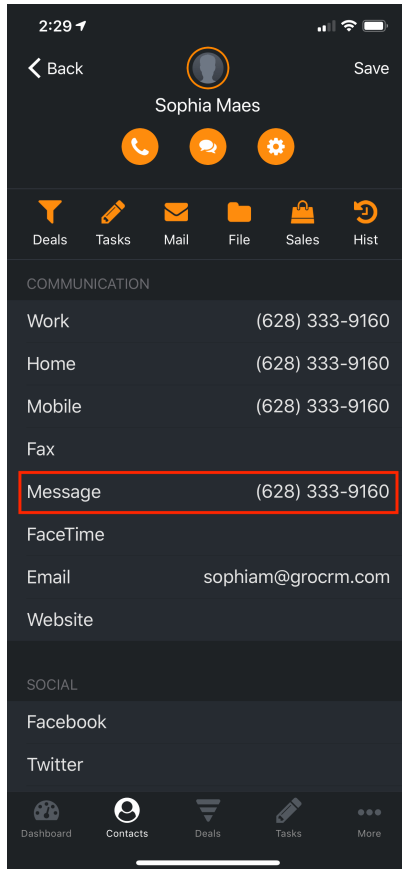
## 22. Contacts: Email Contact



### Email Contact

In your Contacts detail record if you have “Email” filled in, the header button on the top of the record will turn on.

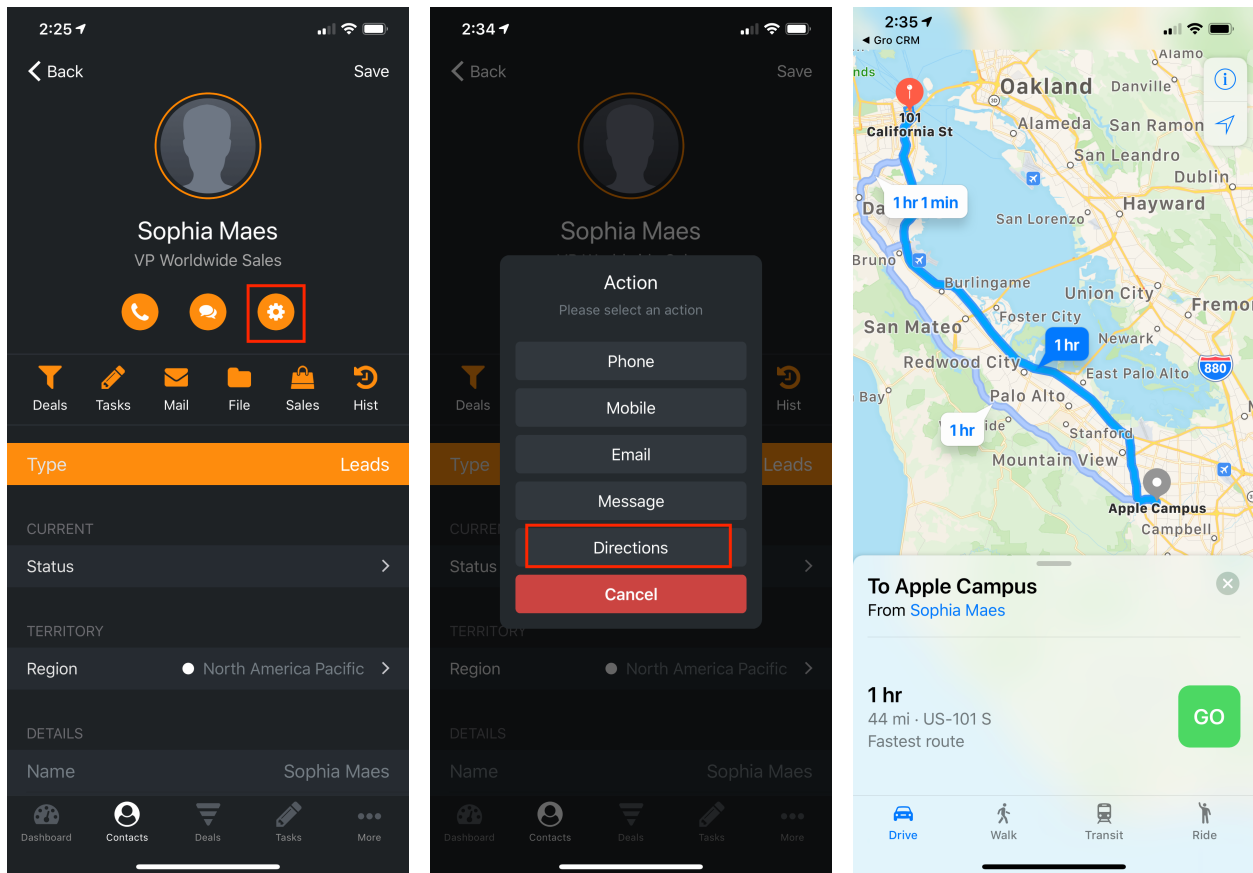
## 22. Contacts: Message Contact



### Message Contact

In your Contacts detail record if you have “Message” filled in, the header button on the top of the record will turn on.

## 22. Contacts: Get Contact Directions



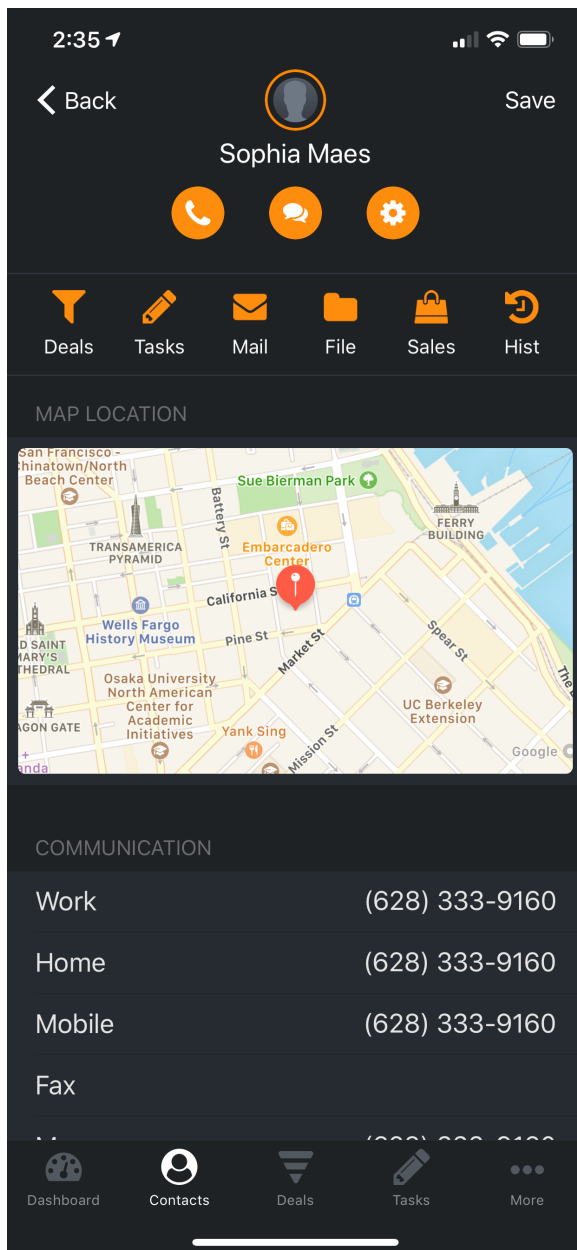
### Get Contact Directions

In your Contacts detail record if you have filled in the address information, the header button on the top of the record will turn on.

*Note: We only batch add geo-location data to Apple Imports and Spreadsheets for “Basic” and “Pro” edition users up to 2500 contacts. If you need to batch more than 2500 records please contact support to discuss your import needs.*

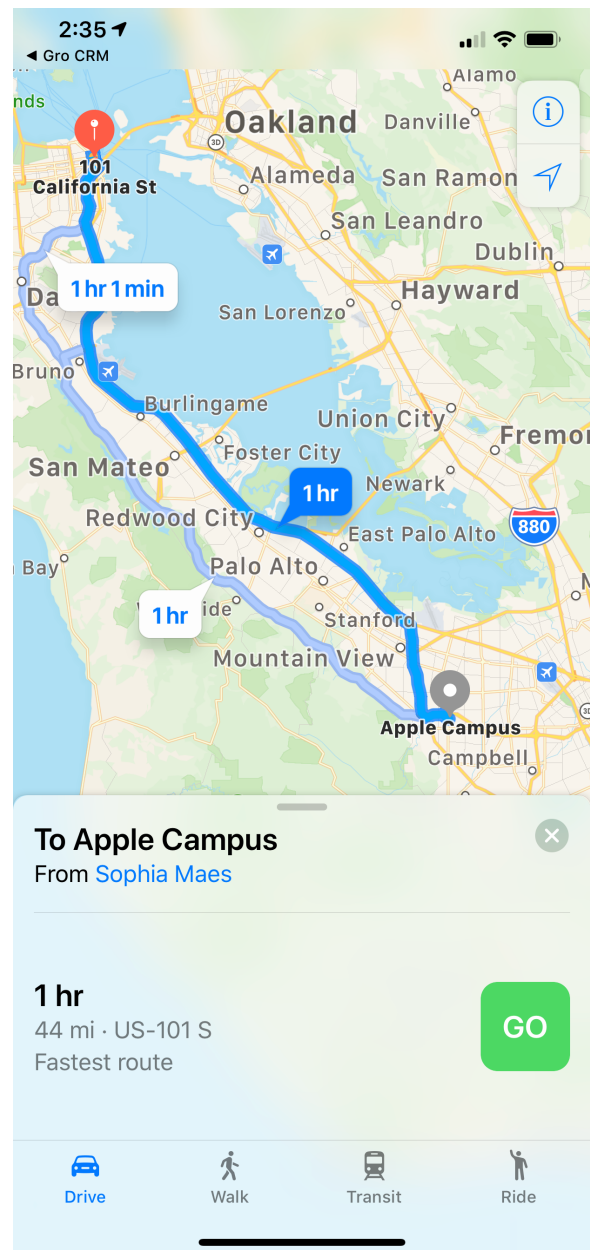
When manually entering contacts or updating contacts we always grab geo-location data.

## 22. Contacts: Get Contact Directions (Continued)



### Contact Detail Map

If you have address information saved we will add map data.

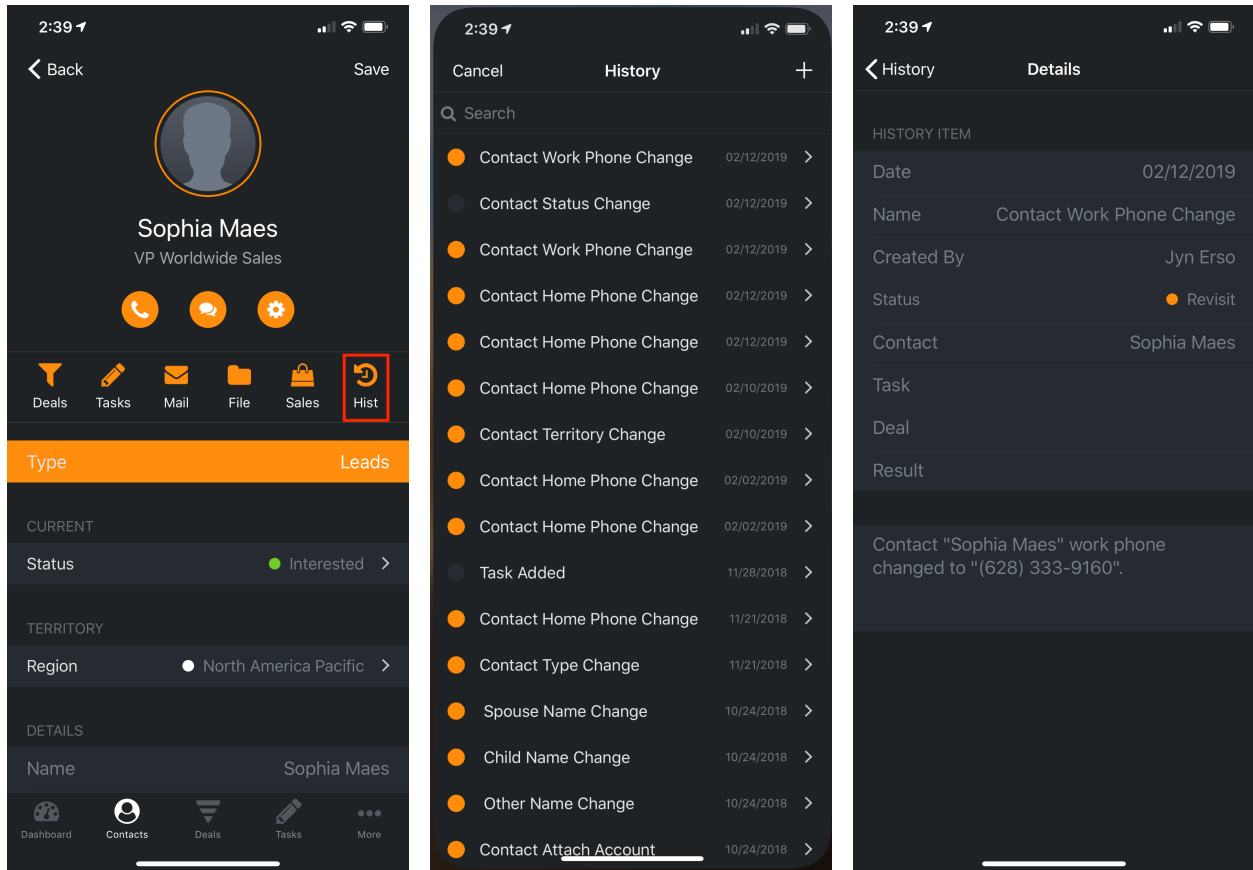


### Get Direction

If you tap the map in Contact Details we will give you direction options from your location to the contacts destination.



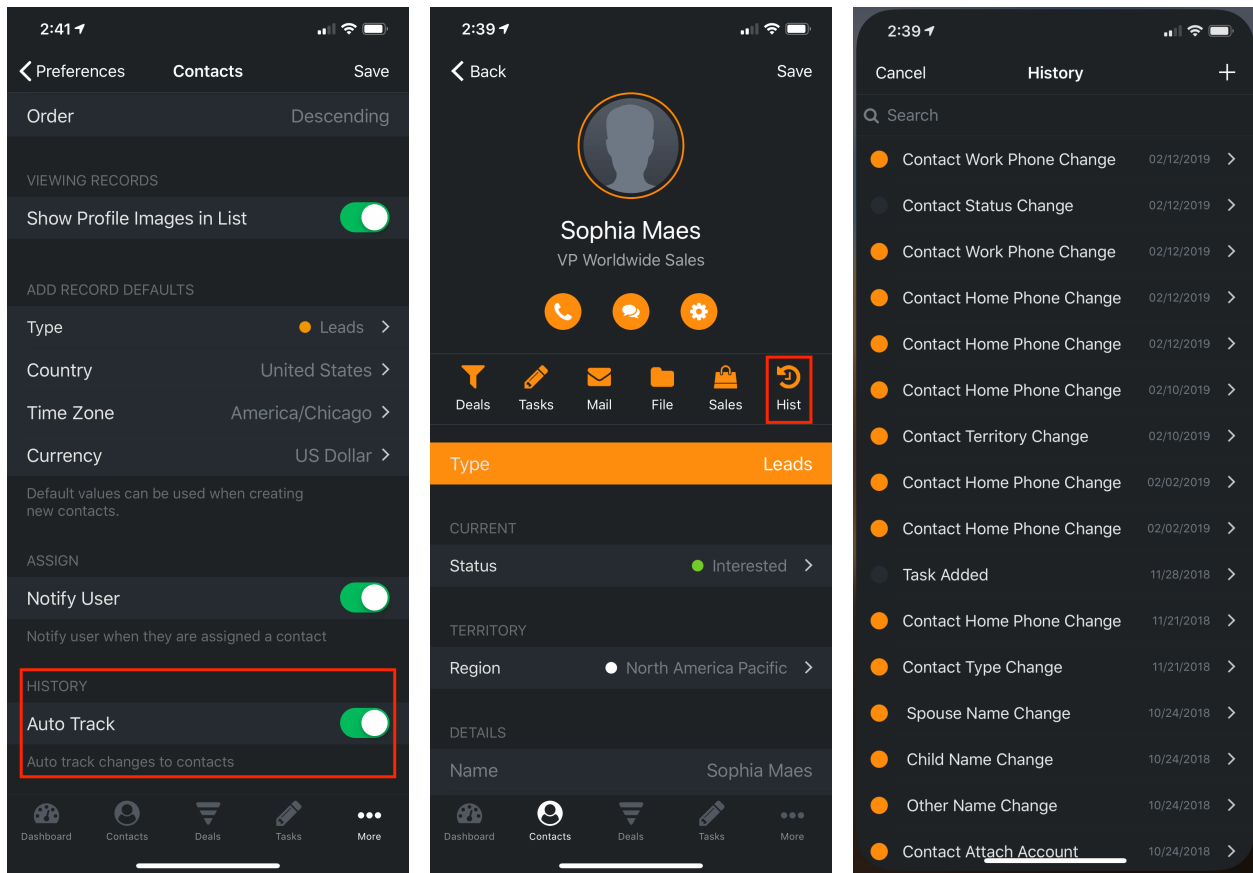
## 22. Contacts: Contact History Notes



### Contact History Notes

If you click the "Hist" button you can see all the communication with the specific contact. You are able to add new history notes, and all your users notes will funnel in here as well.

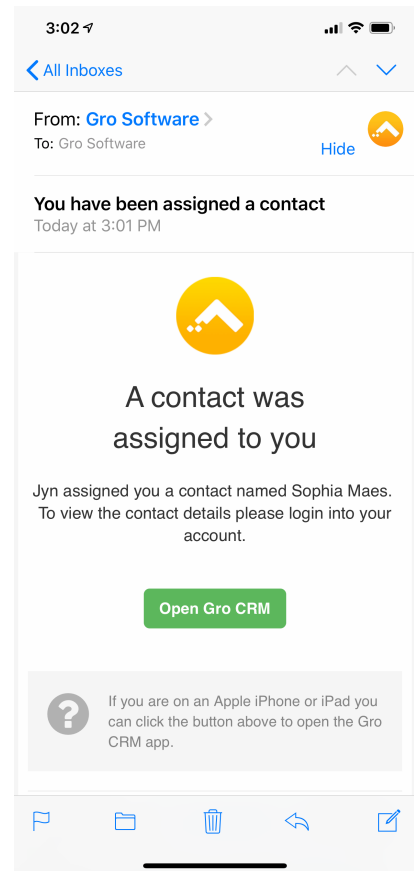
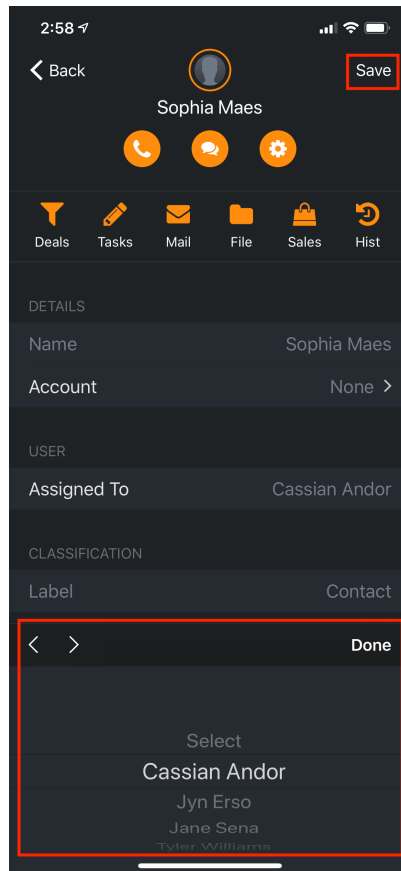
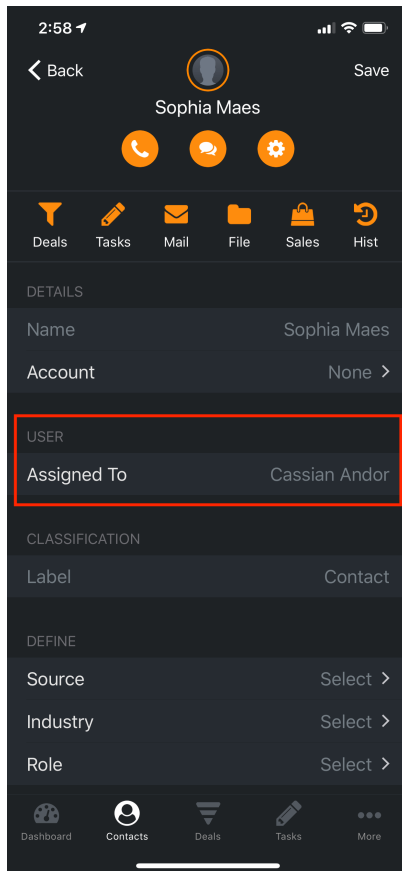
## 22. Contacts: Auto History Tracking (Pro)



### Auto-tracking Contact History Notes

In Preferences->Contacts you are able to activate “Auto Track”. If you turn on this options the system will automatically track all changes to a contact. This is a great way to see what has been done to a contact or if contact data has been removed, or modified.

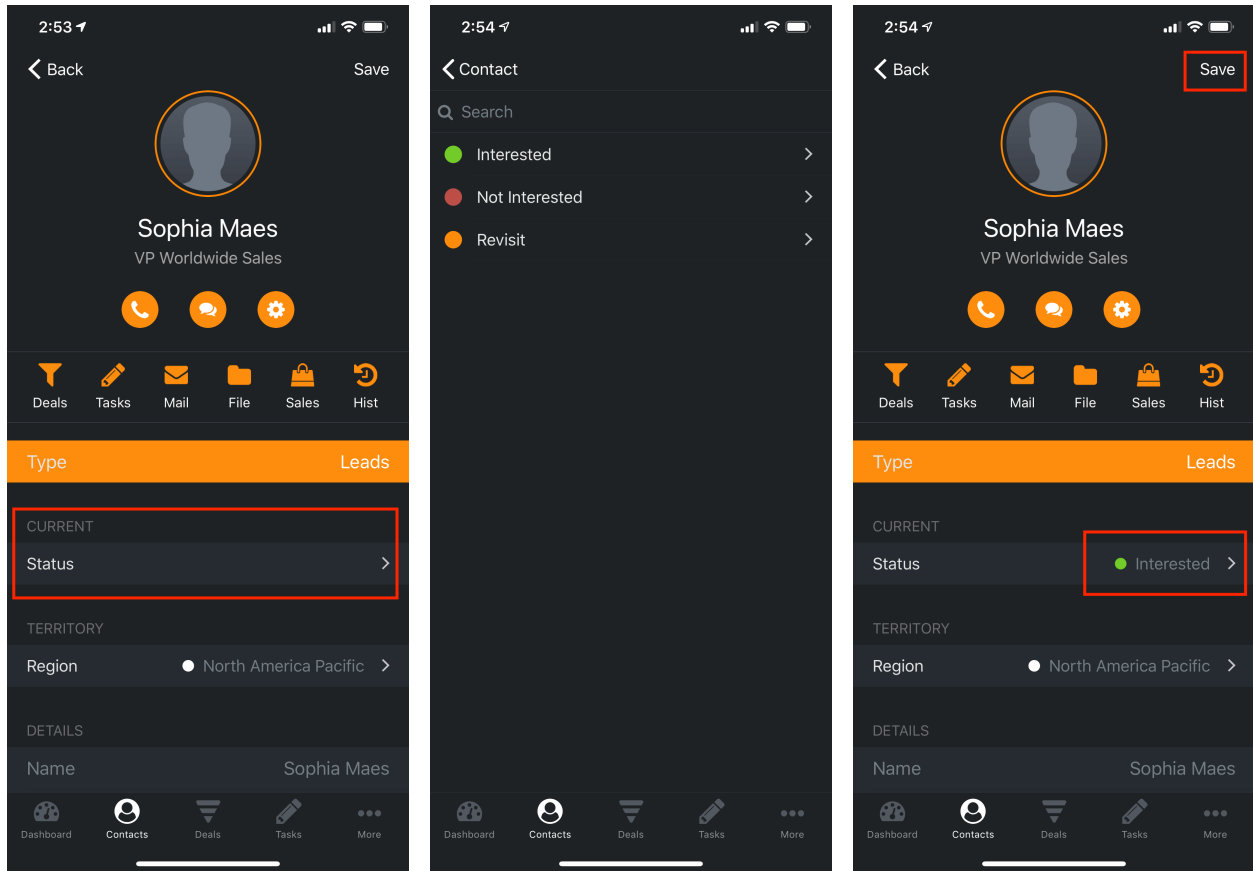
## 22. Contacts: Assign Contacts (Pro)



### Assign Contact

By Default all contacts you create are assigned to you. If you would like to assign a contact to another user you can do this. Once a contact has been assigned to another contact they will receive an email showing that they were assigned a new contact.

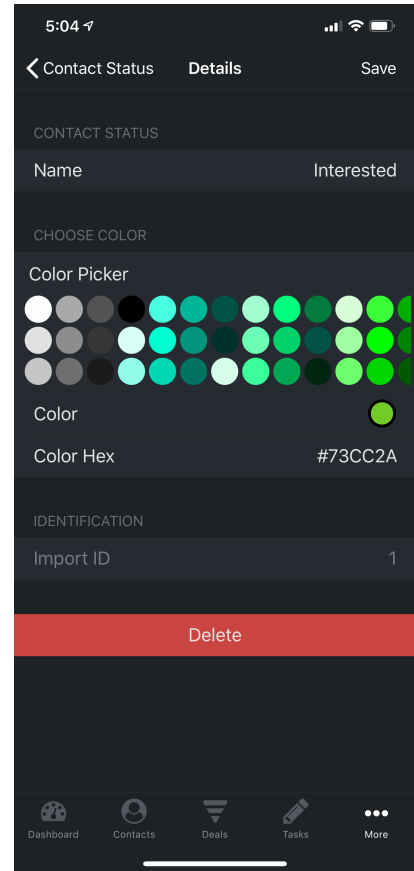
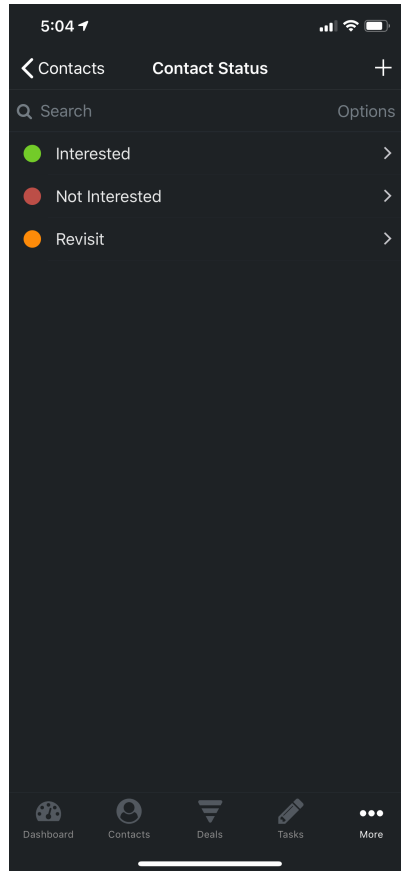
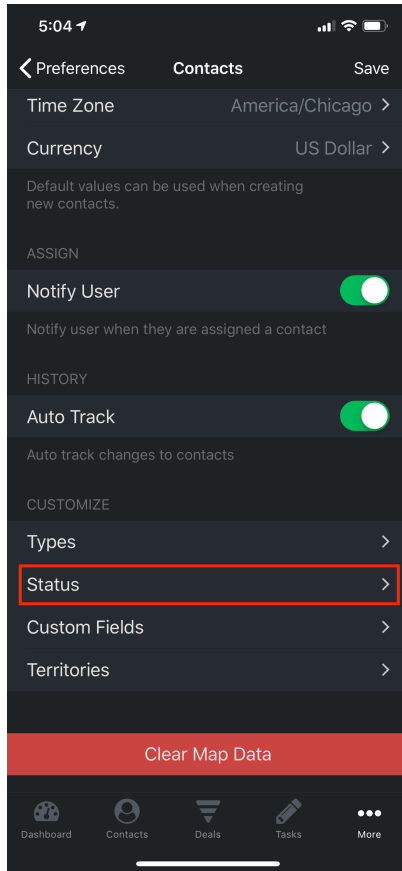
## 22. Contacts: Status (Basic & Pro)



### Contact Status

You can assign a “Status” to a contact. We create (3) defaults for you “Interested”, “Not interested” and “Revisit”

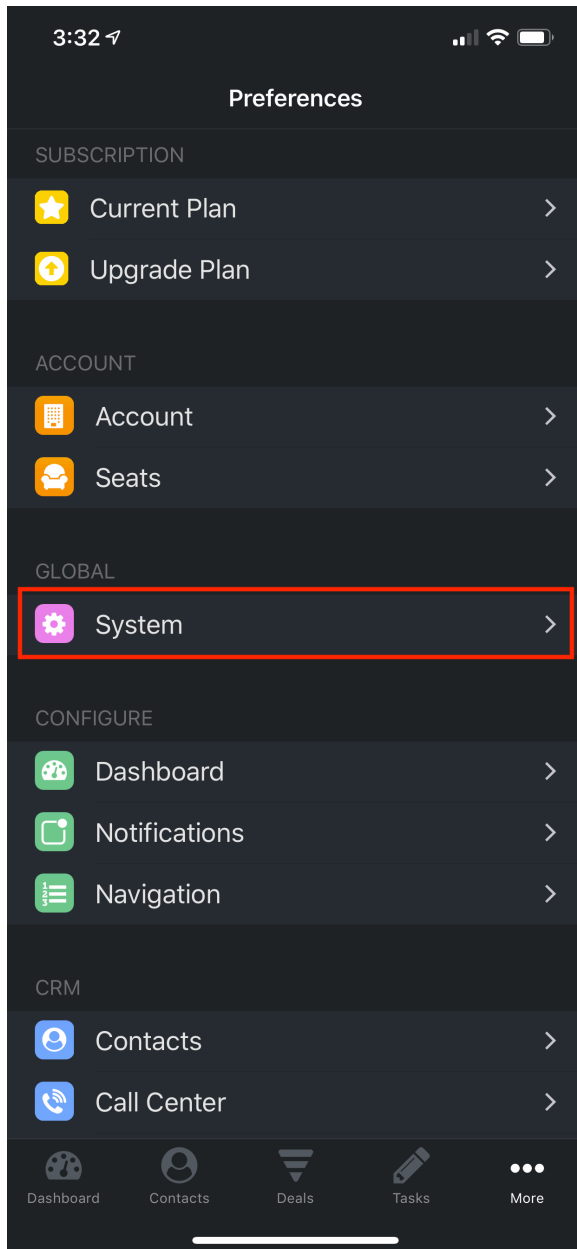
## 22. Contacts: Status Prefs (Basic & Pro)



### Customize Contact Status

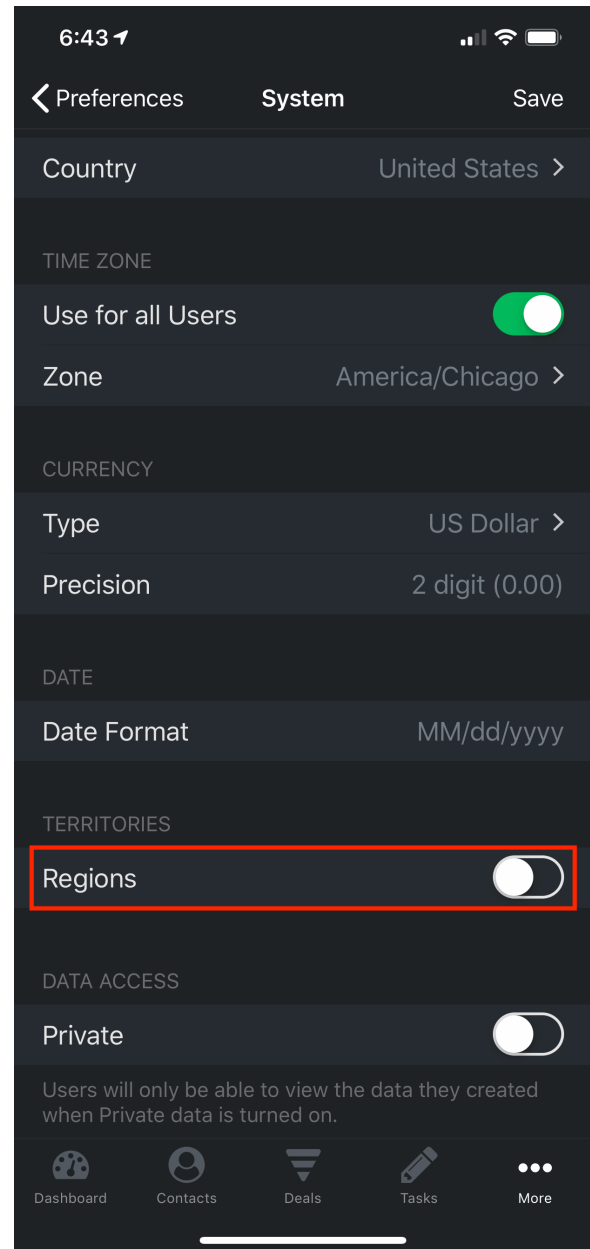
in Preferences->Contacts->Status you are able to add, modify and delete status types.

## 22. Contacts: Territories (Pro)



### System Prefs

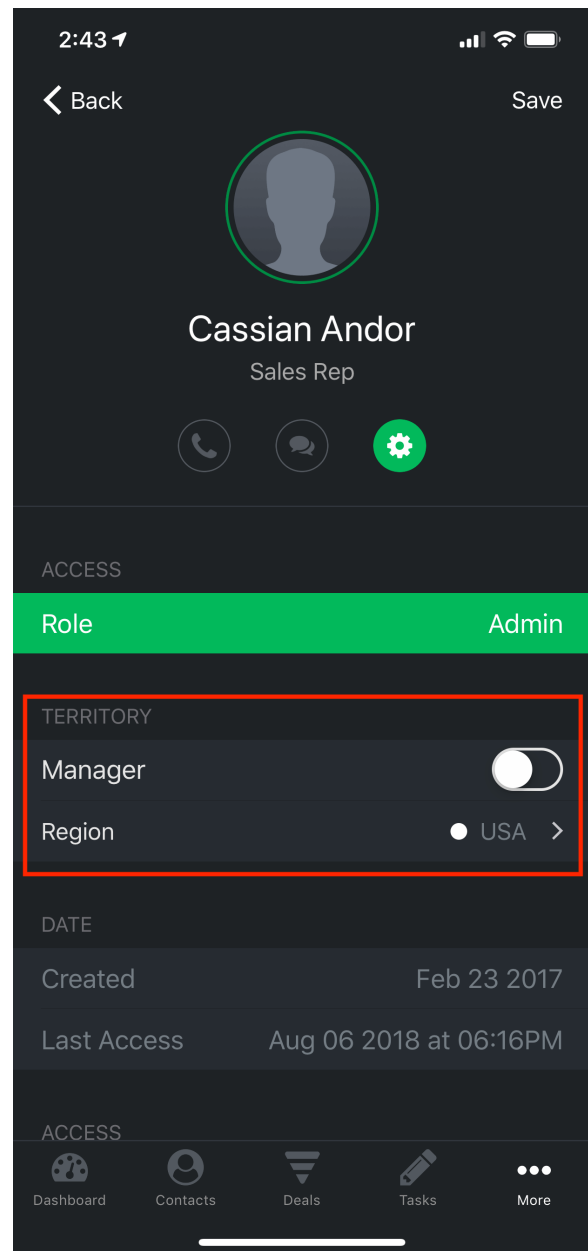
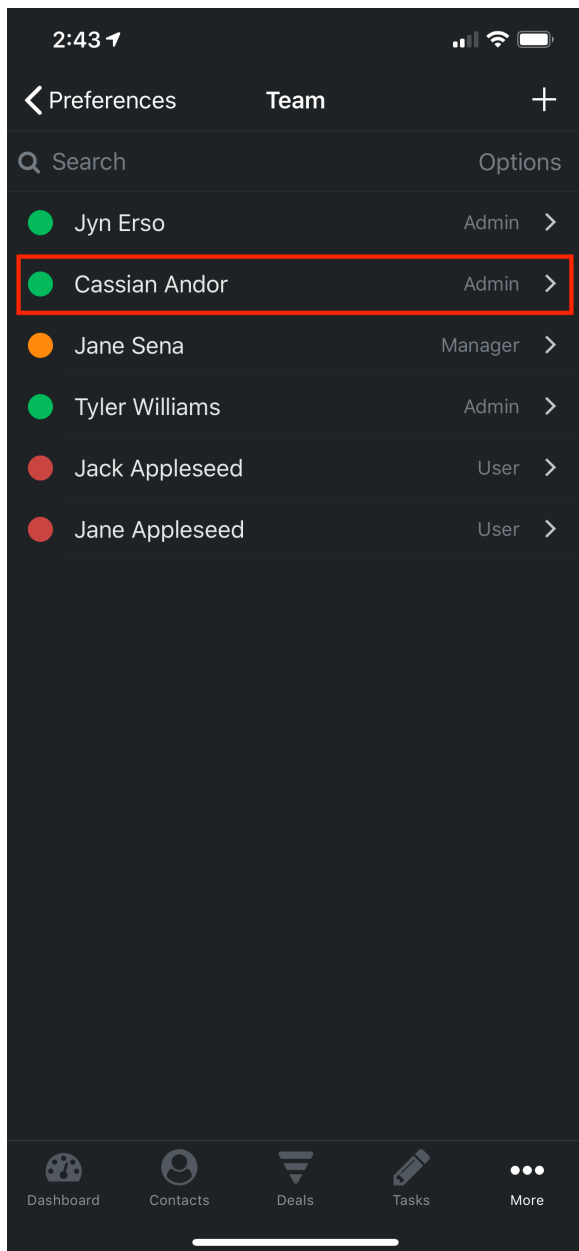
This is where you can manage System level preferences. Changing these requires you to be booted out of the system for the change to take effect.



### Activate Territory Regions

To Activate Regions turn on and click "Save"

## 22. Contacts: Territories (Pro)



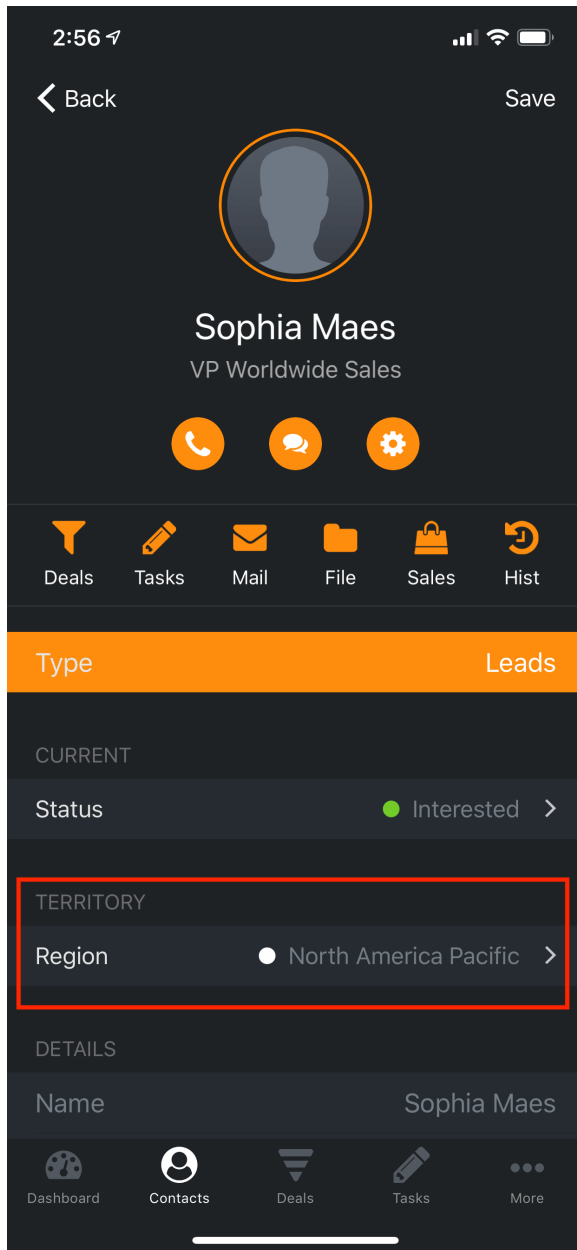
### Your Team

To assign a Territory/Region to a user go to Preferences->Seats->Team

### User Region Options

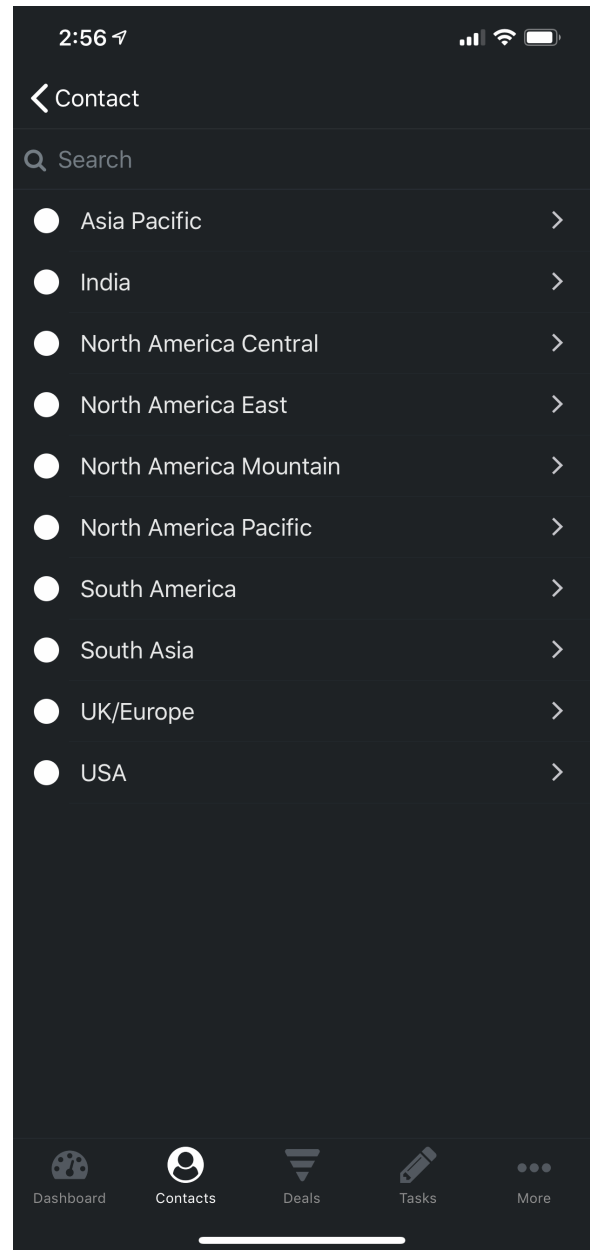
If you activate Manager, the user can see all the records. If this is left off the user will only see the contacts for the assigned region (USA in this example).

## 22. Contacts: Territories (Pro)



### Contact Detail Territory Regions

To claim a contact to a specific Territory/Region.

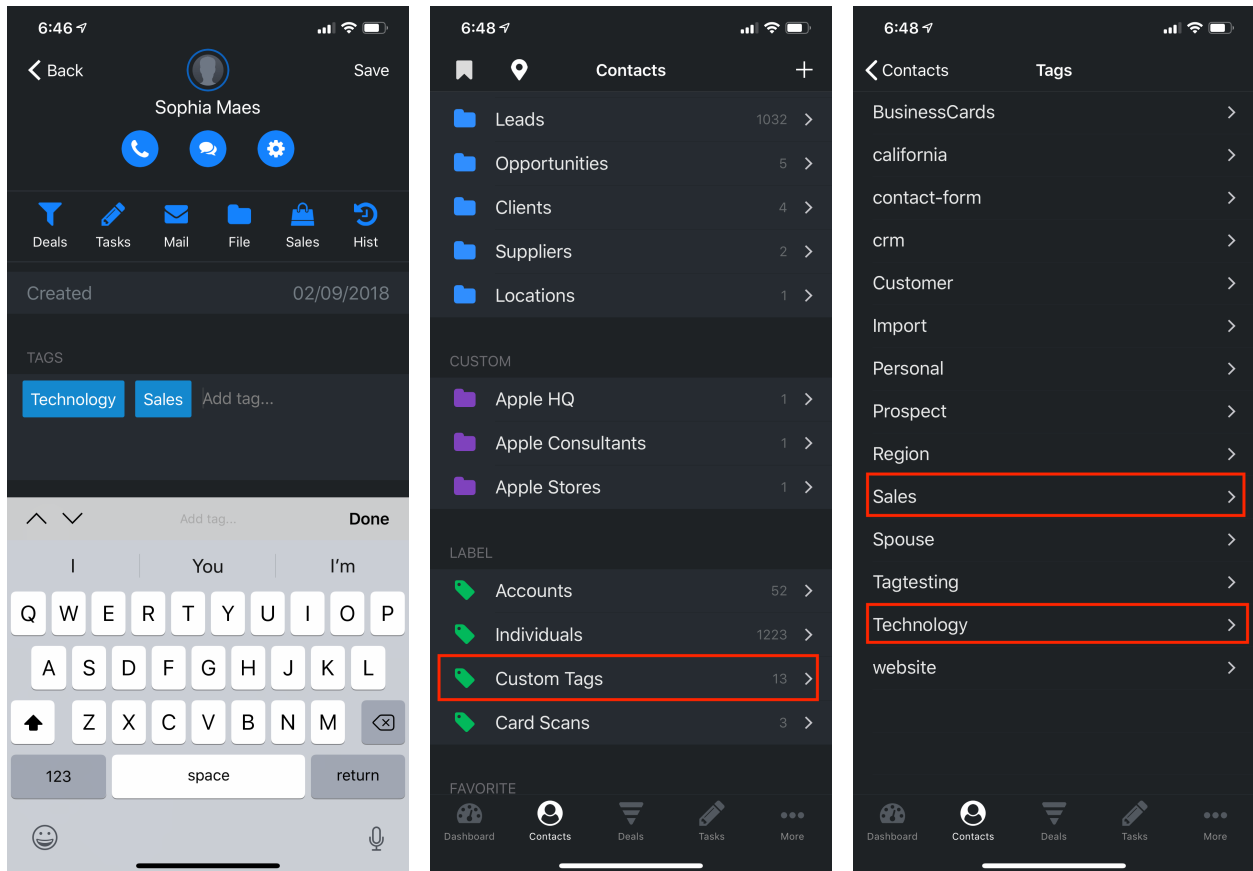


### Choose your Region

Your region options. You can customized these in preferences if you want. These are just the defaults.



## 22. Contacts: Tags

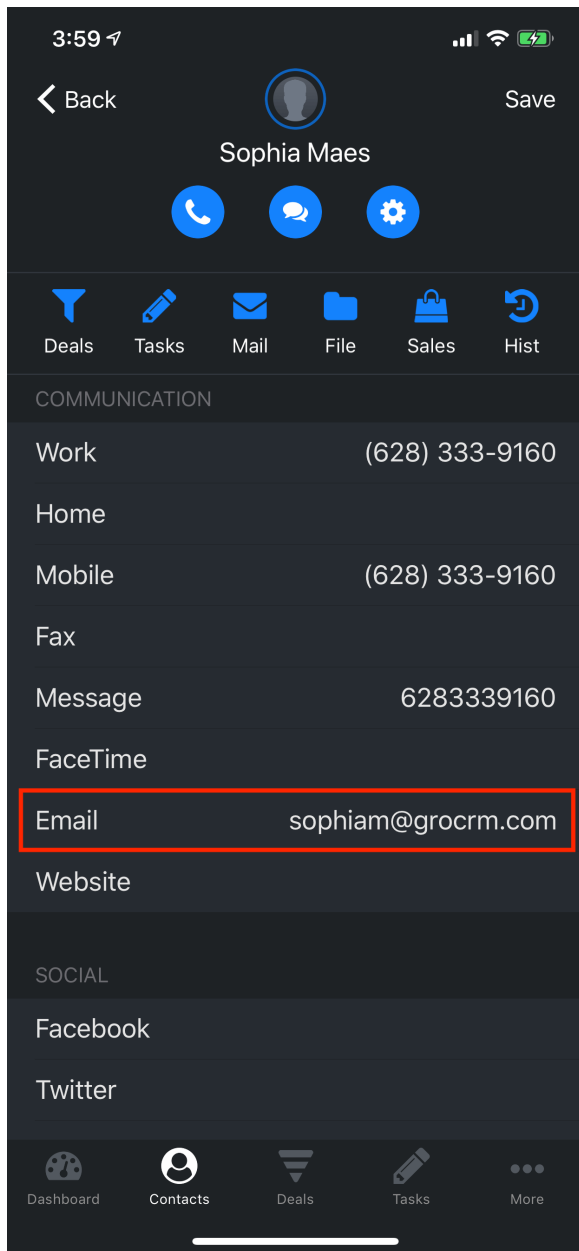


### Contact Tags

You are able to add Tags to a contact. This is useful to search those contact based on the tags you created.

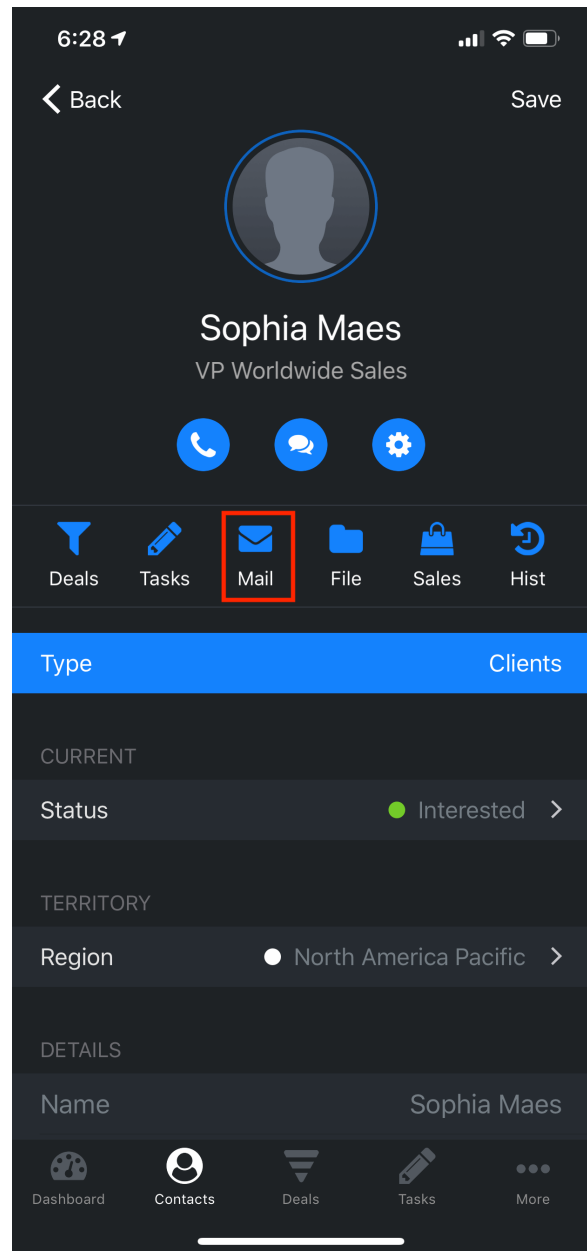
Once you have added tags to your contacts you are able to view them in the contact list view under “Custom Tags”.

## 22. Contacts: Email Tracking



### Contact Email

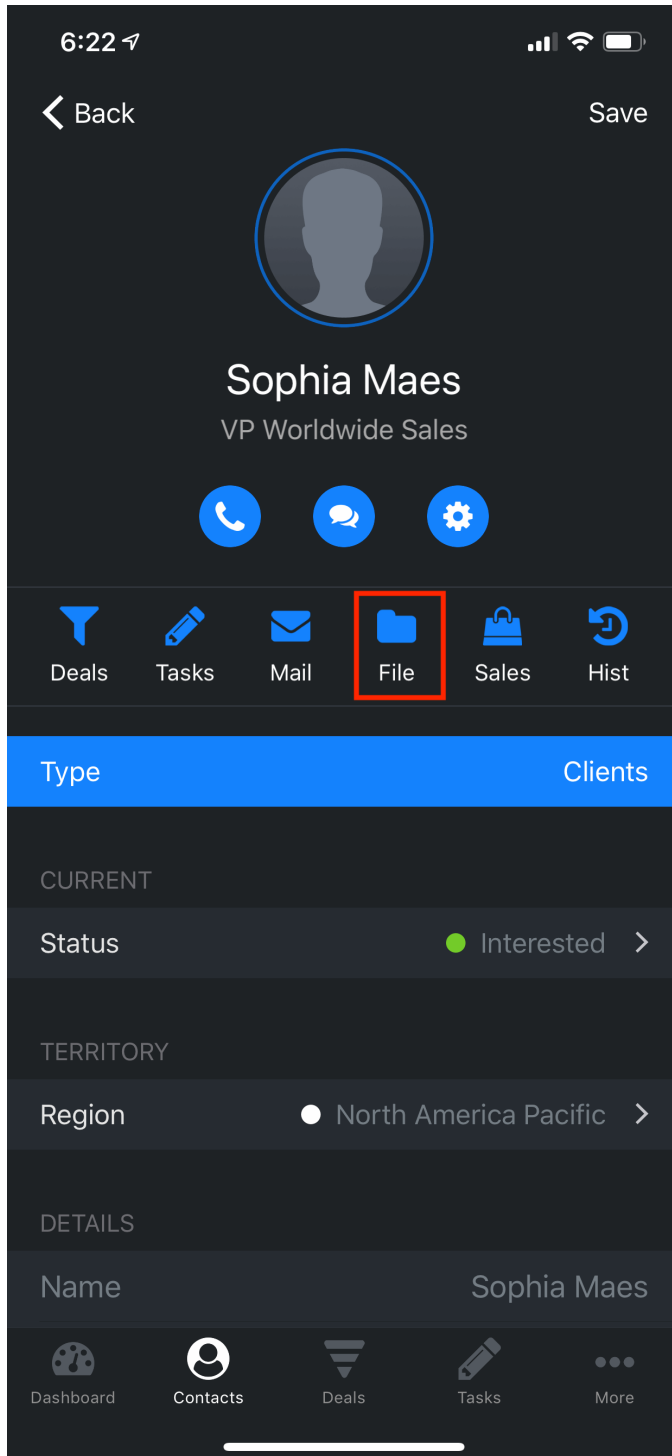
Enter the contact email address.



### Contact Email Tracking\*

Tap the "Mail" icon to see all communication with this email address. \* Requires you to be using our email client.

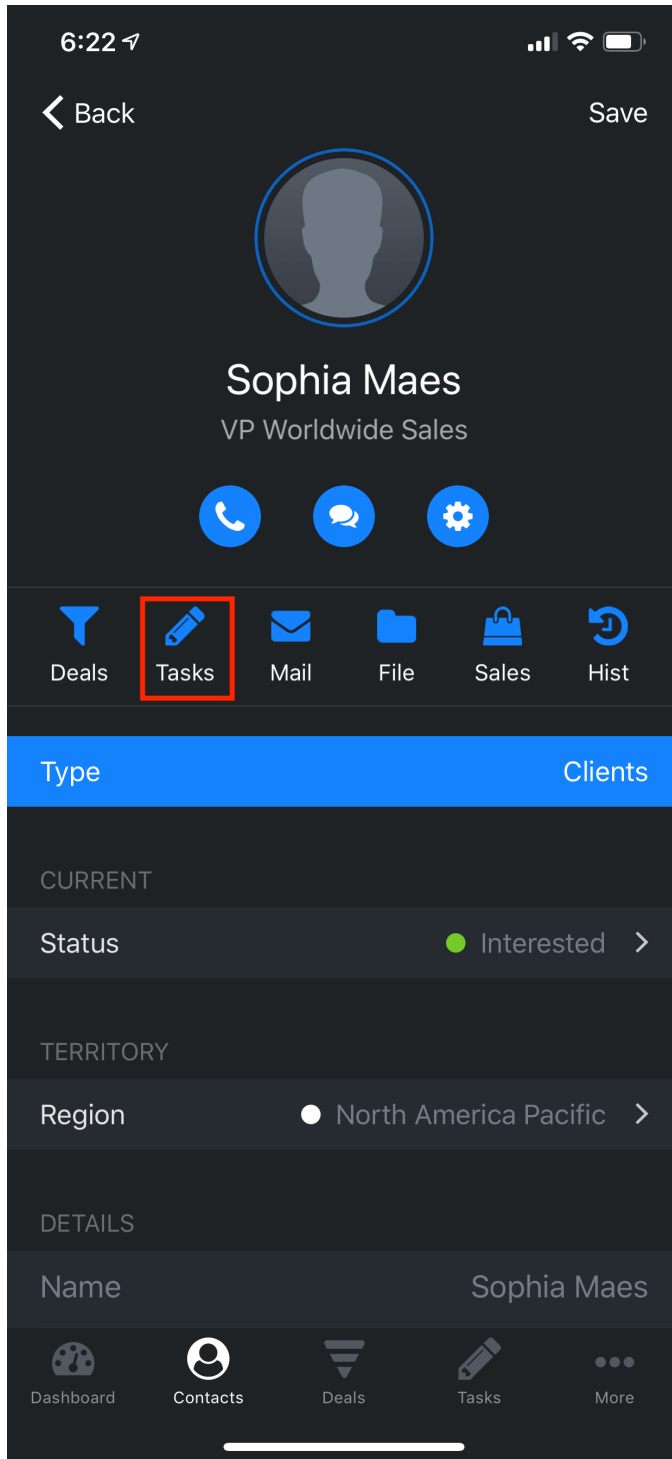
## 22. Contacts: View/Add a File



### Add/View Files to a Contact

To add files or documents from iCloud to your contact just tap the "File" icon in contact details.

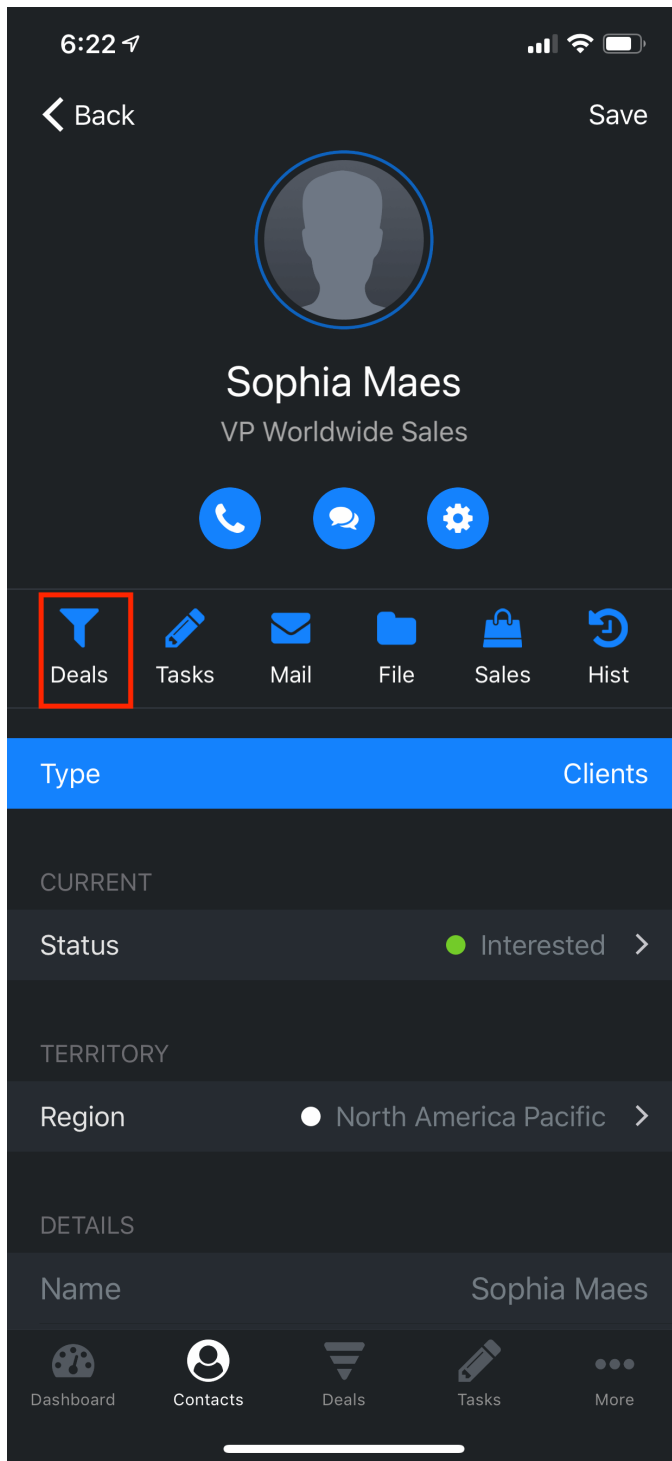
## 22. Contacts: View/Create a Task



### Add/View Contact Tasks

To add/view tasks associated with a contact just tap the “Tasks” icon in contact details.

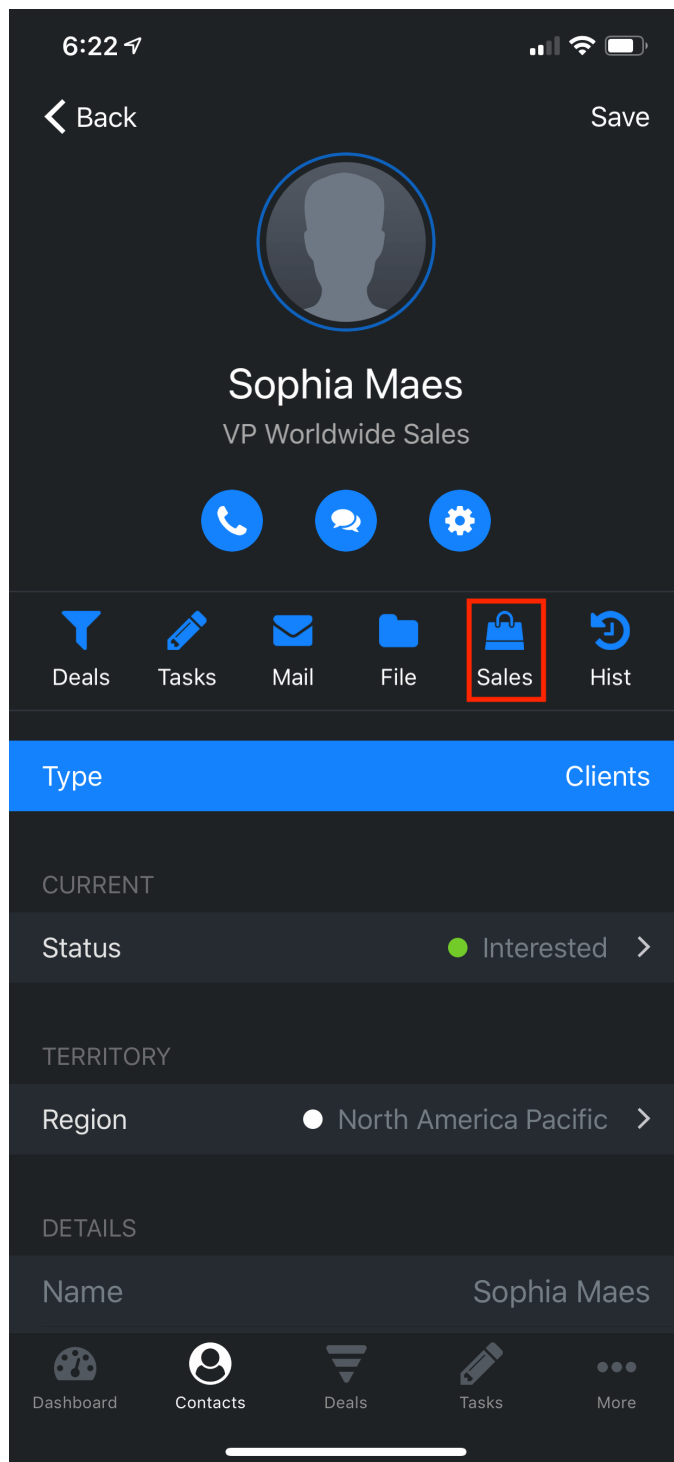
## 22. Contacts: View/Create a Deal



### Add/View Contact Deals

To add/view tasks associated with a contact just tap the “Deals” icon in contact details.

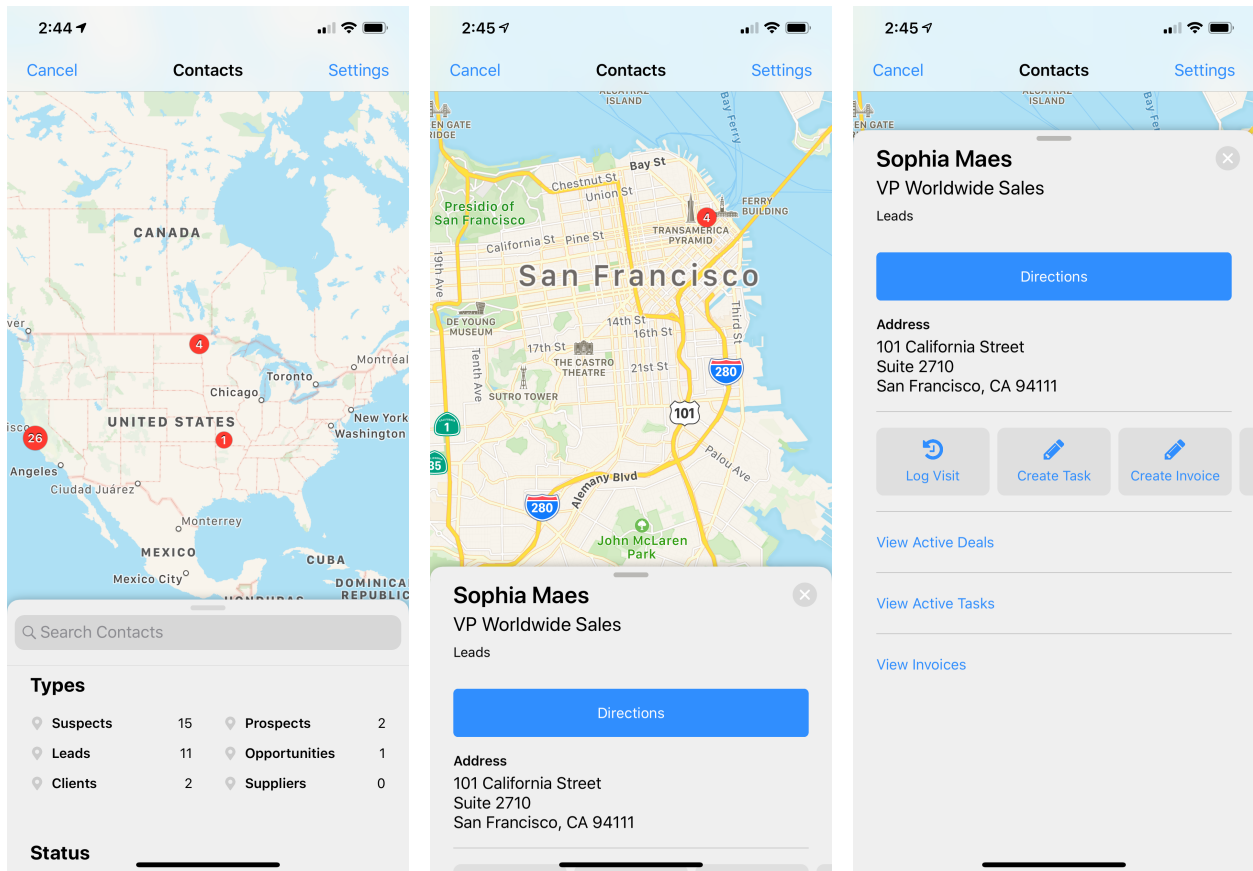
## 22. Contacts: View/Create a Sale Invoice (Pro)



### Add/View Contact Sales

To add/view sales associated with a contact just tap the “Sales” icon in contact details.

## 22. Contacts: Contact Maps (Basic & Pro)



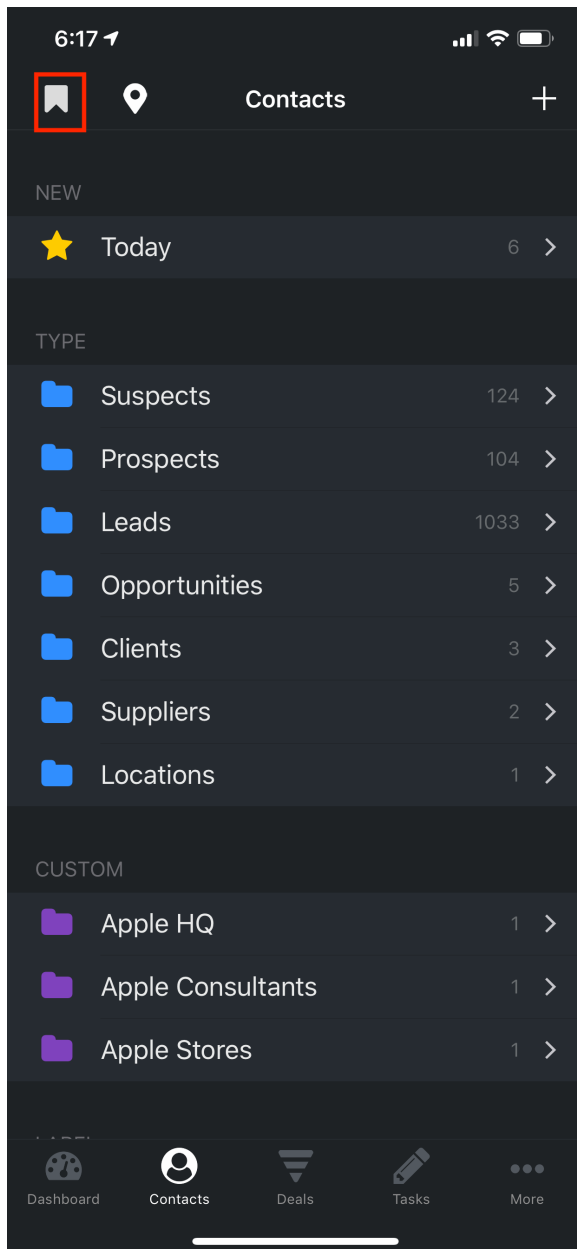
### Contact Map and Stats

Contact Map is a great way to locate your customers when you are in a certain area, or going to canvas an area.

In order for your contact to show up on the contact map you must have the following information filled in for your contacts:

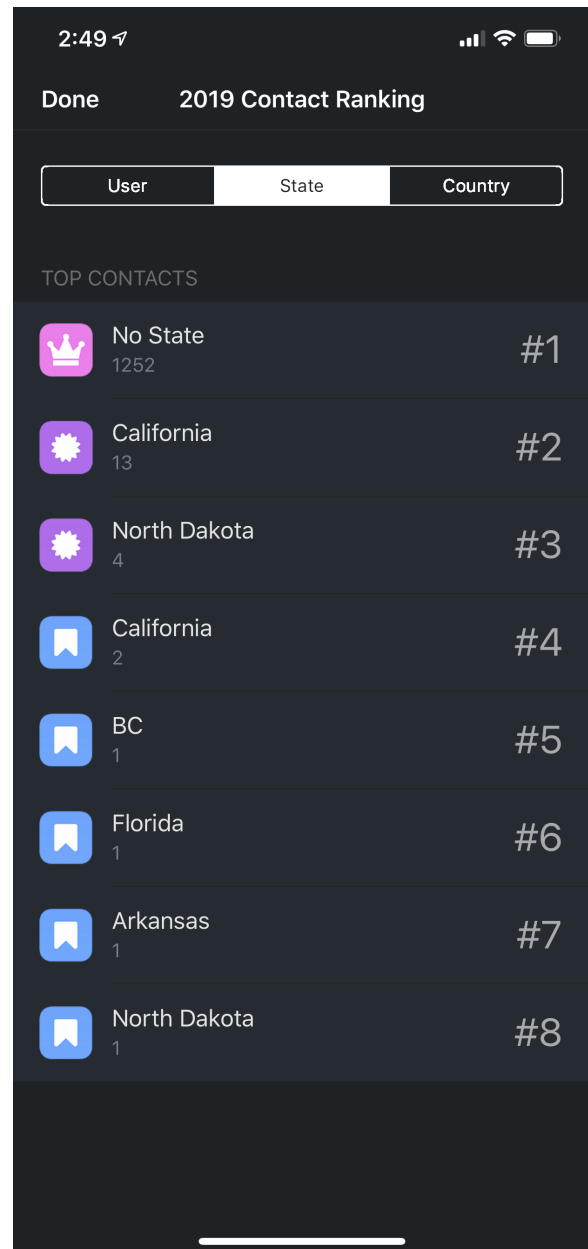
- Address
- City
- State
- Postal Code

## 22. Contacts: Ranking Reports



### Contact Ranking Reports

Tap the “Bookmark” icon in the top left of contact to open up “Ranking Reports”

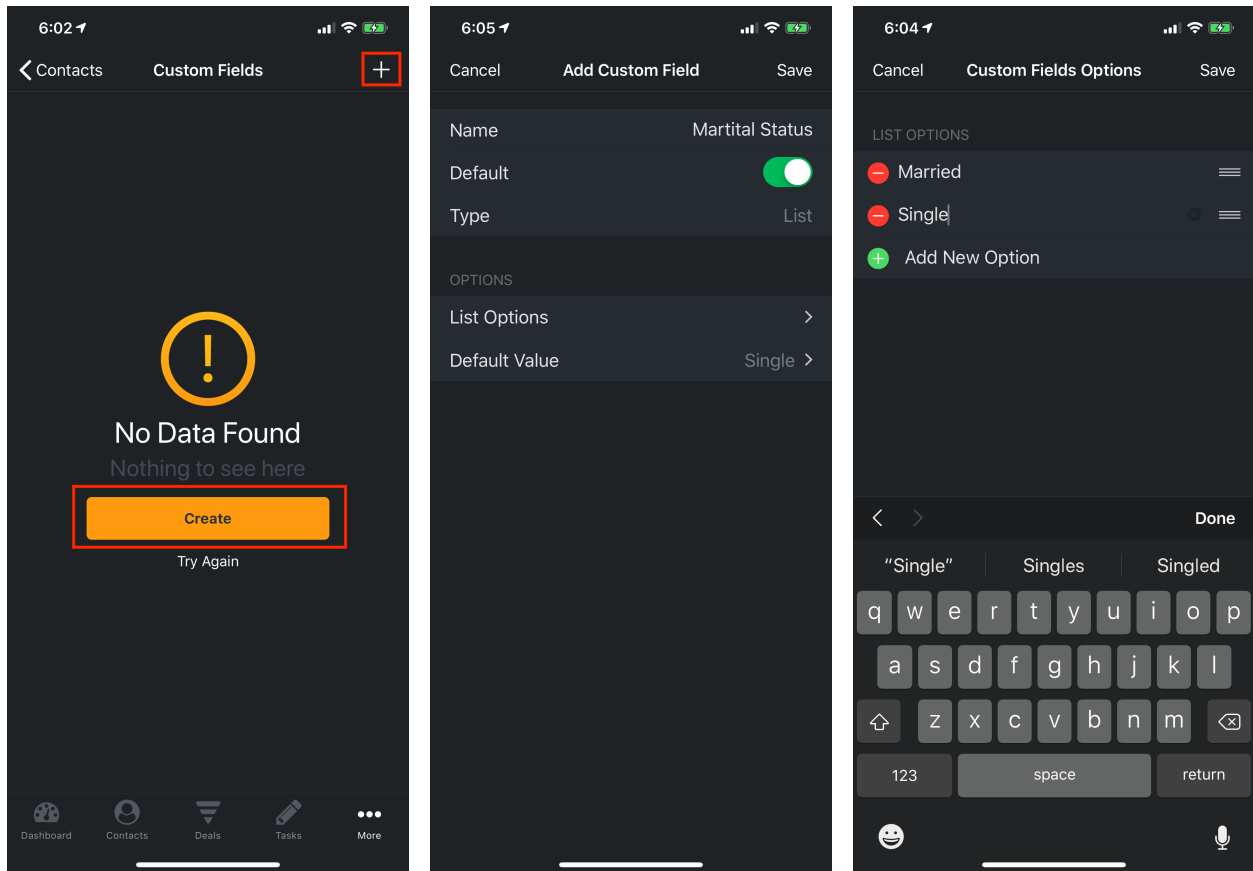


### Choose Your Rank Option

You can view different ranking reports by tapping the bar at the top.



## 22. Contacts: Customize Fields - Create (Basic & Pro)



### Create Contact Customized Fields

To setup customized field go to Preferences->Contacts->Custom Fields

You can create your own customized fields and have them attached to contacts.

#### Notes:

- Basic Edition can create up to 5 customized fields
- Pro Edition can create up to 20 customized fields.

## 22. Contacts: Customize Fields - Add (Basic & Pro)

6:18

Cancel Add Individual Save

Simple Extended

TYPE

Type ● Suspects >

TERRITORY

Region >

CONTACT

First Name

Last Name

Email

CUSTOM FIELDS

Marital Status Single >

Gender Male >

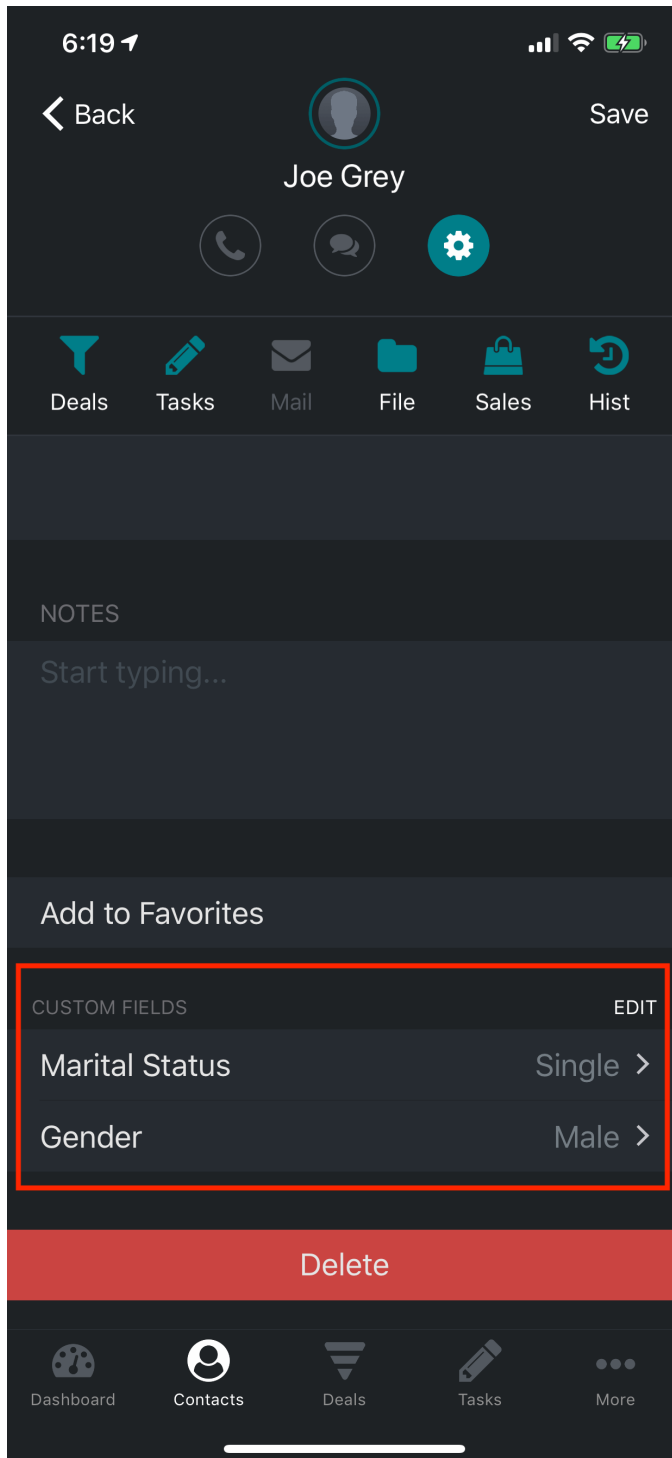
Edit Custom Fields

### Customized Fields When Adding New Contacts

Default customized fields can be added when you add new records.

To make the customized field a default go to Preferences->Contacts->Custom Fields

## 22. Contacts: Customize Fields - Details (Basic & Pro)



### View and Manage Customized Fields in Your Contact Detail.

When viewing records with customized fields attached to them you will see them in the contact details.