FREQUENTLY ASKED QUESTIONS

Answers to everything about Invoice Manager for Canada

Setup, payments, deposits, recurring billing, booking, forms, and step-by-step guides for connecting Google Calendar and Apple Calendar. 119 answers, no jargon.

Jump to: Getting started | Invoices, estimates and recurring billing | Canadian taxes | Online payments | Online booking and appointments | Appointments calendar | Google Calendar | Apple Calendar | Clients, dashboards and shortcodes | Projects | Forms | Shop, licences and subscriptions | Emails and branding | Reports, expenses and payroll | Troubleshooting and support

12 QUESTIONS

Getting started

Install it, find your way around, and send your first invoice.

What is Invoice Manager for Canada?

It is a WordPress plugin that handles invoicing, estimates, recurring billing, online payments, client management, online booking, forms, a built-in shop, reports, expenses and payroll tracking, all designed around Canadian taxes. It is self-contained: no outside service is required to run it, and your data stays inside your own WordPress site.

What do I need to run it?

A WordPress site running **WordPress 5.8 or newer** and **PHP 7.4 or newer**. Online payments need an account with at least one payment processor (for example Stripe, PayPal, Square, Helcim or Moneris), or you can use Interac e-Transfer instructions with no processor at all.

How do I install it?

1. In WordPress go to **Plugins > Add New > Upload Plugin**, choose the plugin zip and click **Install Now**, then **Activate**.
2. Open **Invoicing > Settings** and fill in your company details on the **Company & General** tab.
3. Check the **Canadian Tax Rates** tab and the **Payment Terms & Late Fees** tab.
4. On the **Payment Gateways** tab, connect the processors you want to use.
5. Add a client under **Invoicing > Clients**, then create your first invoice under **Invoicing > Invoices**.

Where do I find everything?

Everything lives under the **Invoicing** menu in your WordPress admin: Dashboard, Invoices, Recurring, Estimates, Clients, Groups, Reports, Appointments, Forms, Form Submissions, Services, Staff, Payroll, Products, Subscriptions, Licenses, Expenses and Settings.

Settings has seven tabs: **Company & General**, **Payment Terms & Late Fees**, **Email & Reminders**, **Canadian Tax Rates**, **Payment Gateways**, **Templates** and **Booking & Calendar**.

How does pricing work?

There is one license per WordPress site, and you can pay for it two ways. Every feature is included either way, and both end with you owning the system for life:

- **Pay once: $1,500** for one business, one WordPress site, plus a staging copy.
- **Pay monthly: $50 a month for 36 months** ($1,800 in total).

Another website, including a client's, needs its own license.

When your monthly payments reach the total, the payments stop and you own the system for life. There are no per-seat charges and no features locked behind a higher plan. Want to see it first? Ask for a live demonstration.

What happens if I cancel or stop paying the monthly plan?

You can cancel anytime. If your payments stop before they reach the total ($1,800), the plugin is deactivated. Once your payments reach the total, it is yours for life and nothing more is due.

What is the ongoing support add-on?

It is an optional **$19.99 a month** add-on for ongoing Razenet service and support. It is **not included in the product purchase**: the license gives you the plugin, and support is something you can add on top. You do not need it to use or own the plugin, it does not count toward the total you pay to own it, and you can add it whenever you want. Contact us to add it.

Which license do I need, and can I use it on my clients' websites?

Each WordPress site needs its own license. Use it on your own business website with one license (plus a staging copy for testing). If you run WordPress sites for clients, each client site gets its own license, bought by the client or by you on their behalf. You cannot resell the plugin or hand clients a copy to keep. If you stop managing a client's site, remove it from there. The full wording is in the license terms.

How does the price compare with subscription tools?

A typical invoicing plan, online booking plan and forms plugin cost roughly $1,512 CAD, $972 USD and $477 USD over three years at list price, and keep renewing. Single Site is $1,500 once for all of that and more. The marketing page shows the comparison and its sources; plans differ in features and limits, so check each vendor for today's prices.

How is this different from subscription software?

Most invoicing systems charge you every month forever, and when you stop paying you lose access and still do not own anything. Here, the monthly option has a finish line: you pay until you own the system, then you are done.

What is a "seat", and do you charge for them?

A **seat** is a paid license for one person to use a piece of software. With per-seat pricing, every person who logs in needs their own seat and you pay for each one, usually every month. A business with an owner, two staff and a

bookkeeper would pay for four seats, and the bill grows every time someone joins.

We do not have seats. Your price does not depend on how many people on your team use the system, so you can add staff, a bookkeeper or an accountant without paying more.

Where is my data stored?

Inside your own WordPress database. Payments go straight to your own gateway accounts. The plugin does not send your invoices or client list to anyone.

16 QUESTIONS

Invoices, estimates and recurring billing

Everything about creating, sending and collecting on documents.

How do I create and send an invoice?

1. Go to **Invoicing > Invoices** and add a new invoice.
2. Pick the client, set the issue date and payment terms, and add line items (description, quantity, rate and whether each is taxable).
3. Save it. Setting the status to **Sent** emails it to the client with the PDF attached, if automatic sending is turned on under **Settings > Email & Reminders**. You can also email it by hand at any time.

Each invoice gets a secure, login-free **View & Pay** page, and you can see when the client opened it.

What payment terms can I set?

Due on Receipt, Net 7, 15, 30, 45 or 60, or a custom due date, set per invoice. A default is set under **Settings > Payment Terms & Late Fees**.

Can I schedule a promotion for a month or for certain services?

Yes. Open **Invoicing > Promotions** and create a promotion once: a name, an optional description, the discount (a percentage or a fixed amount), the dates it runs (the **This month** and **Next month** buttons fill them in) and what it applies to: the whole invoice, or only the services you tick. While it is live it is applied automatically to new invoices, including the ones created when a client books a service or buys a product, and a service promotion is taken off only the lines for those services. You can also choose a promotion by hand in the **Promotion** box on any invoice, pause it, or see how many invoices used it. If more than one fits an invoice, the one that saves the most is used (promotions never stack), and an invoice that already has a discount typed in is left alone. Every invoice a promotion touches is marked as a promo in Reports and on the client dashboard.

How do I set a turnaround time on a service and let clients track it?

Open **Invoicing > Services** and edit a service. Under **Turnaround / ETA** enter a number and choose days, weeks or months, then tick **Clients can view and track progress**. When a client books, the estimated completion date is worked out from the booking date and shown on the booking page. Clients follow progress (status, progress bar, ETA and your note) in **Track your work** on My Bookings and on their dashboard. You update status, ETA and the note under **Appointments > Manage > Progress and turnaround**.

What does a duration of 0 do on a service?

A service with a duration of **0** is date-only: clients choose a day but no time slot, the duration is hidden for it, it adds no time to other services booked with it, and it never blocks other bookings or staff. It is handy for drop-off work such as

repairs.

How do I show a promo or discount on an invoice?

Enter the discount (a fixed amount or a percentage) on the invoice, then type a **Promo description** such as "Spring sale" or "Referral credit". The invoice page and PDF are marked **PROMO APPLIED** with the description and the amount taken off. In **Reports > Invoices** those invoices carry a PROMO tag and a Promo column (with a filter for promo-only or no-promo invoices, included in the CSV and PDF export), and your clients see the same tag and description next to the invoice on their dashboard. Estimates and recurring invoices carry the description through to the invoices they create.

How do deposits on invoices work?

On any invoice or recurring invoice, choose a **Deposit** type under the Discount row: none, a **percentage** of the total, or a **fixed amount**. A percentage over 100 is treated as 100, and a fixed amount is never more than the invoice total.

- The View & Pay page shows a **Pay Deposit** box first. Once the deposit has been paid, it asks for the remaining balance.
- The invoice PDF and the pay page show a **Deposit due now** line.
- Every payment gateway charges the deposit amount first, then the balance.

How do recurring invoices work?

Under **Invoicing > Recurring**, create a profile with a client, line items, a start date and a schedule: weekly, biweekly, monthly, quarterly or yearly. An optional end date stops it automatically.

- Tick **Automatically email each generated invoice** to send them as they are created. If it is unticked, each one is created as a draft for you to review.
- A daily background task creates invoices whose date has arrived.
- Use **Run now** on the Recurring list to generate one early.

Can a recurring invoice take a deposit only the first time?

Yes. Set the deposit on the recurring profile, then tick **Only take the deposit on the first generated invoice**. The first invoice carries the deposit and every later one is billed in full with no deposit. Without that box ticked, every generated invoice carries the same deposit.

Can I send the first recurring invoice right away?

Yes. When you create a new recurring invoice, tick **Generate and email the first invoice immediately**. When you save, the first invoice is created and emailed to the client straight away, even if automatic emailing is off. The next one follows on the normal schedule.

How do late fees work?

Under **Settings > Payment Terms & Late Fees**, set a percentage or flat fee and a grace period. A daily background task applies the fee to overdue invoices once the grace period passes, and the client is emailed a notice each time a fee is applied. You can also re-apply the fee repeatedly, every set number of days.

Can the plugin send payment reminders?

Yes. Under **Settings > Email & Reminders**, turn on automatic reminders and choose how many days before the due date, and on which days after, they should go out (for example 3, 7 and 14). Reminders are sent by a daily WordPress background task, with the invoice PDF attached.

How do estimates work?

Create estimates under **Invoicing > Estimates**. Clients can view an estimate and **Accept or Decline** it online with no login. An accepted estimate converts to an invoice with one click.

Can I practice without messing up my reports?

Yes. Mark an invoice as a **test payment** (button on the invoice, or in bulk from the Invoices list). Test invoices stay in your list with a TEST badge but are left out of every report, export and dashboard total. The Invoices list hides them by default; use the filter to show them.

Can I copy other people on invoices?

Yes. Add CC addresses on any invoice or estimate, send a one-off copy to a different address without changing the client's email, or set standing CC addresses on the client so they are applied automatically.

Can I update many invoices at once?

Yes. Tick several invoices on the list, then use **Bulk actions** to change their status (for example mark a batch Paid), email them to their clients, or mark them as test payments.

3 QUESTIONS

Canadian taxes

GST, HST, PST and QST without the spreadsheet.

How are taxes calculated?

The plugin uses the **province selected on the client or invoice** to add the right taxes automatically: for example HST in Ontario, GST plus PST in British Columbia, and GST plus QST in Quebec. Each line item has a Taxable box, and a client can be marked **tax-exempt**.

Are the tax rates up to date?

Default rates for all 13 provinces and territories come pre-filled, and every rate is editable under **Settings > Canadian Tax Rates**. Governments change rates from time to time, so review them against CRA and provincial guidance.

Do my reports show tax collected?

Yes. The quarterly report shows invoiced amounts, tax collected, payments received, expenses and net income for each quarter of any year, and exports to CSV or PDF.

11 QUESTIONS

Online payments

Connect Stripe, PayPal, Square, Helcim, Moneris, Interac and the one-tap wallets.

Which payment options are included?

- **Stripe** cards (Stripe Checkout)
- **PayPal**
- **Square** cards

- **Helcim** cards (embedded HelcimPay.js form)
- **Moneris** (Moneris Checkout)
- **Interac e-Transfer** (shown as payment instructions on the invoice)
- **Apple Pay** and **Google Pay** (processed through your Stripe account)

Money goes to your own accounts. You turn on only the ones you want, under **Settings > Payment Gateways**.

How do I connect Stripe?

1. In **Settings > Payment Gateways**, enter your Stripe test and live publishable and secret keys.
2. In your Stripe dashboard add a webhook endpoint that points to the Webhook URL shown on that settings page (it looks like `https://yoursite.com/?imc_gateway=stripe&imc_action=webhook`) and listens for `checkout.session.completed`.
3. Paste the endpoint's **Webhook Signing Secret** into the plugin and save.

Tip: Payments are confirmed with Stripe before they are recorded, and a payment is never recorded twice.

How do I connect PayPal?

Enter your PayPal **Client ID** and **Client Secret**, and use **Sandbox / test mode** to try it first. The settings page shows the webhook URL to register in PayPal.

How do I connect Square?

Find your access token and location ID in the Square Developer Dashboard under your application. Use the Sandbox values with sandbox mode, or the Production values for live. The token and location ID must come from the same tab. Subscribe the webhook URL shown on the settings page to the `payment.updated` event and paste Square's signature key.

How do I connect Helcim?

1. In Helcim, go to **All Tools > Integrations > API Access Configurations** and create or open an API access configuration.
2. Make sure it has permission to process payments and to read transactions afterward.
3. Copy its **API Token** into **Settings > Payment Gateways > Helcim**, tick enable, and save.

The card form opens as a window on your own invoice page; the customer is not sent to another site.

Helcim says "refused to connect" or the card window will not open

Helcim sits behind a security layer that sometimes challenges a browser or network instead of showing the payment form. It is most often caused by a VPN, a privacy or ad-blocking extension, or a flagged internet connection.

- Try a different browser or device, or another network such as your phone's data.
- Turn off any VPN and try with extensions disabled.
- If it keeps happening, contact Helcim support and send them the `Cf-Ray` value from the failing request (browser developer tools > Network tab).

If it works on another device, your setup is fine and customers on normal connections should not be affected.

How do I connect Moneris?

Enter your **Store ID**, **API Token** and **Checkout ID**. The Checkout ID is a checkout configuration profile you create in the Moneris Merchant Resource Centre, separate from the store ID and API token. There is a test (QA) mode for trying it out.

How does Interac e-Transfer work?

Interac has no public API for merchants, so the plugin shows your e-Transfer email (and an optional security question and answer, only if Auto Deposit is not set up) on the invoice. You mark the invoice paid yourself once you have received and accepted the transfer.

How do I turn on Apple Pay and Google Pay?

1. Set up Stripe first. The wallets use the same Stripe keys and fees.
2. In **Settings > Payment Gateways > Apple Pay & Google Pay**, tick **Enable Apple Pay** and/or **Enable Google Pay**.
3. For Apple Pay, in Stripe go to **Settings > Payment methods > Apple Pay > Add new domain**, download the verification file, paste its contents into the plugin, save, then press **Register Domain With Stripe**.
4. Add the `payment_intent.succeeded` event to your Stripe webhook.

Each button appears only on a device that supports it: Apple Pay in Safari with a card in Wallet, and Google Pay in Chrome with a card saved to Google.

Are payments recorded automatically?

Yes for every gateway except Interac. The plugin confirms the payment with the gateway before it marks anything paid, then sends the client a receipt. Interac payments are marked paid by you.

Can I add another payment gateway?

Developers can register additional gateways with the `imc_payment_gateways` filter by extending `IMC_Payment_Gateway_Base`, with no changes to the plugin itself.

17 QUESTIONS

Online booking and appointments

Let clients book, pay a deposit and reschedule themselves.

Can I give each service category its own booking page?

Yes. Every category you create under **Invoicing > Services > Categories** automatically gets its own shortcode, shown next to it in the list. A category called Repairs gets `[imc_book_repairs]`, which shows the booking form with only the Repairs services. Paste it on any page.

The shortcode keeps working if you rename the category, and it is removed when you delete the category (the services are kept, just uncategorised). You can also write `[imc_book_service category="Repairs"]` to do the same thing by name, slug or id. Role options such as `roles="MSP Client"` work on these shortcodes like any other.

Can I change the line of text above the services on the booking page?

Yes, per category. Under **Invoicing > Services > Service Categories**, edit a category and fill in **Subtext on the booking page**. When clients are choosing from that category, for example on its own `[imc_book_repairs]` page, your text replaces the standard "Select every service you would like and they will be booked back to back in one visit." When several categories are on one page, each category's subtext appears under its own heading. Leave it empty to keep the standard wording.

Can I switch several services on or off at once?

Yes. On **Invoicing > Services**, tick the services you want, choose **Activate** or **Deactivate** under **Bulk actions** and click **Apply**. Inactive services disappear from the booking page straight away, which is handy for seasonal or paused services. Existing bookings and invoices are not affected, and you can activate them again at any time. The same menu also assigns a category or deletes the selected services.

How can I change how services look on the booking page?

Under **Invoicing > Services**, the **Client Preview** shows your real services in each layout. Click one and your site switches straight away. There are twelve: Dropdown, Cards, List, Price menu, Compact, Tiles, Price panel, Pricing cards, Lines, Checklist, Banners and Dark cards. You can also choose under **Settings > Booking & Calendar**.

Every layout shows the price, deposit and subscription badges, and any **Not included** list, and all of them stack neatly on phones. Dark cards suit dark or bold sites, Checklist makes it very clear what is selected, and Compact fits a long list on one screen.

Can I tell clients what a service does not include?

Yes. When you add or edit a service under **Invoicing > Services**, fill in **Not included**, one item per line, for example "Replacement parts" or "Data recovery". Clients see those items in a red **Not included** box under the service while they choose it (in the card, list and menu layouts), and again on the confirmation step before they book. Leave it empty and nothing is shown.

Can I sell a service as a subscription?

Yes. When you add or edit a service under **Invoicing > Services**, tick **Sell as a subscription** and choose how often it renews: **weekly, every 2 weeks, monthly or annually**. It is annual unless you choose another, and clients cannot change it. The booking form shows *Subscription: renews annually* (or the frequency you set) next to the service.

When a client books it, the booking invoice is the first charge, and a recurring invoice is created that bills the full service price again on the schedule and emails each invoice automatically. The first invoice tells the client the service renews. You can see, pause or end it under **Invoicing > Recurring**.

If the booking is cancelled before the first renewal, the subscription ends with it. After a renewal has billed, it stays active until you end it under Recurring, and the booking history says so. Rescheduling a booking keeps the subscription. A deposit applies to the first invoice only. This creates the recurring invoice, not recurring appointments; each renewal is billing, so the client books their next visit as usual.

How do I set up online booking?

1. Add your services under **Invoicing > Services**: a name, price, length, and a deposit percentage (or require payment in full).
2. Under **Settings > Booking & Calendar**, set your business hours and tick **Enable online service booking**.
3. Put the `[imc_book_service]` shortcode on any page. Optionally put `[imc_my_bookings]` on a page so clients can see and manage their upcoming bookings.

Clients must be logged in and linked to a client record to book. Every new WordPress account is linked to a client record automatically.

How do booking deposits and automatic cancellation work?

Booking a service creates an invoice. If the service needs a deposit, the time slot is held while the client pays. Under **Settings > Booking & Calendar** you choose how long before the appointment the deposit must be paid.

- If it is not paid in time, the appointment is cancelled, it is removed from your calendar, the unpaid invoice is deleted and the time slot opens up again.

- Optionally, the client gets a warning email first with **Pay Now** and **Change My Booking** buttons.
- Bookings made inside the cancellation window are left alone so the client has time to pay.

Can clients book several services in one visit?

Yes. Turn on the option to let clients stack several services into one booking. They get one combined time slot and one invoice. You can cap the total length per booking.

Can I add staff with their own schedules?

Yes. Add staff under **Invoicing > Staff**. Once you have an active staff member, times are offered based on who is working and free, and a time taken for one person can still be booked with another. You can let clients choose a staff member, or have one assigned automatically.

Can I block holidays and days off?

Yes. Under **Settings > Booking & Calendar > Holidays & Closed Dates**, block Canadian statutory holidays automatically for every year (including Good Friday, Victoria Day and Thanksgiving, and holidays that move to the next weekday). Choose all federal, provincial and territorial holidays, federal only, or federal plus one province. You can also add your own closed dates, one per line or as a range like `2026-12-24 to 2026-12-31`.

Where do I manage appointments?

On **Invoicing > Appointments**. It keeps a full history of each booking, change and cancellation, including who did it and when. You can move an appointment to a new time or cancel it (optionally emailing the client), and delete cancelled appointments one at a time, in bulk, or all at once. Confirmed appointments are never deleted by this.

Can I require clients' address and phone number?

Yes. Tick the option to require address, city and phone number before a booking is confirmed. The details are saved to the client's record.

Can I change the wording on booking invoices?

Yes. Under **Settings > Booking & Calendar** you can edit the message shown near the top of a booking invoice (for example that the deposit confirms the appointment and a phone call will follow) and set booking-specific Terms & Conditions. Leave the terms blank to use your standard invoice terms.

Can I choose how services look, and limit how many can be stacked?

Yes. Under **Invoicing > Services > Categories** each service group can use its own layout, from thirteen designs including cards, a list, a menu, a checklist and a large **+ button** that adds a service to the booking with one click and removes it with another. Each group can also have a **stacking limit**: the most services from that group a client can book in one visit. A quick Active / Inactive switch on the Services list turns a service on or off without opening it.

Can clients stack services that need a deposit or payment in full?

Yes. Services that need a deposit can be stacked together, and so can services that need payment in full. The only combination that is blocked is mixing the two in one booking, because a deposit and a full payment cannot sit on the same invoice. The client is warned as they tick services, and the rule is enforced when they book. The client can book the other kind in a second visit.

Does the booking page jump back to the top when a client checks availability?

No. Picking services, choosing a date and checking availability all happen in place, so the client stays where they are on the page. A red **Cancel** button clears the date, times and selected services and takes them back to the start.

6 QUESTIONS

Appointments calendar

See every booking in one calendar, move appointments by dragging, and share it with your team.

What is the appointments calendar?

It is a full calendar of your bookings, found under **Invoicing > Calendar** (and a **Calendar view** button on the Appointments page). Switch between month, week, day and list views. Appointments take the colour of their service group, and cancelled ones can be shown or hidden.

How do I move, add, cancel or delete an appointment?

- **Move:** drag it to another day or time, or click it and choose a new date and time. The usual rules apply (business hours, closed days, clashes), and administrators can switch on *Allow moves outside business hours* to override them.
- **Add:** click **+ New appointment**, or click an empty day or time. Choose the client, services, date, time, staff and notes, and whether to create and email an invoice.
- **Cancel:** click the appointment and choose **Cancel appointment**. An unpaid invoice for it is removed.
- **Delete:** a cancelled appointment can be deleted for good. A live one has to be cancelled first.

Are clients told when I move or cancel an appointment?

Only if you want them to be. Tick **Email the client when I move an appointment** above the calendar. It is off by default, so you can tidy your diary without sending anything.

Does an appointment I add by hand reach Google or Apple Calendar?

Yes. If Google Calendar is linked, the appointment is added there straight away, and moving or cancelling it later updates Google too. It also appears in your Apple / iCal feed, which is built from your bookings, the next time Apple refreshes it. Appointments with no set time (length 0) are not added to Google because they have no time of day.

Can my staff use the calendar on a page of my site?

Yes. Put `[imc_appointments_calendar]` on a page. By default only administrators see it. Under **Calendar > Settings** choose which WordPress roles may use it, or set them on the shortcode, for example `roles="editor,shop_manager"`. Everything is checked on the server, so a person without a chosen role cannot use it even if they find the page. Clients never see the calendar.

What designs, sizes and full screen options are there?

Eight designs: Classic, Midnight, Ocean, Forest, Sunset, Mono, Blush and High contrast. Choose the default on the Calendar page, or per shortcode with `template="midnight"`. Set the size with `width="90%"` and `height="700"`, or leave it automatic. A **Full screen** button fills the window (Esc exits). Use `fullscreen="off"` to hide it or `fullscreen="open"` to start full screen.

7 QUESTIONS

Google Calendar

Send bookings to your Google Calendar and stop double-booking.

What does the Google Calendar connection do?

- Every new booking is added to your Google Calendar as an event, with the client's name, phone, email and address (also used as the event location), the services, staff member, invoice number and client notes.
- Busy times on that calendar are checked, so clients cannot book over something already in it.
- Cancelled bookings, including ones cancelled automatically for an unpaid deposit, are removed from the calendar.
- Events use your WordPress timezone (**Settings > General** in WordPress).

It is optional. Booking works normally without it; it just will not create calendar events or check your calendar.

How do I connect Google Calendar? (step by step)

You create your own Google connection once and paste three values into the plugin. This avoids needing a Google-verified app. Google changes the look of its screens now and then, but the steps stay the same.

1. Open the **Google Cloud Console** (console.cloud.google.com), sign in with the Google account that owns the calendar, and **create a project** (any name, such as "Razenet Booking").
2. Go to **APIs & Services > Library**, search for **Google Calendar API** and click **Enable**.
3. Go to **OAuth consent screen** (also called Google Auth Platform). Choose **External**, fill in an app name and your email, and add your own Google account as a test user. Then set the publishing status to **In production** (see the note below).
4. Go to **Credentials > Create credentials > OAuth client ID**. Choose **Web application**, and under **Authorized redirect URIs** add exactly `https://developers.google.com/oauthplayground`. Create it, then copy the **Client ID** and **Client Secret**.
5. Open the **Google OAuth 2.0 Playground** (developers.google.com/oauthplayground). Click the **gear icon** at the top right, tick **Use your own OAuth credentials**, and paste your Client ID and Client Secret.
6. In **Step 1**, type this scope into the box: `https://www.googleapis.com/auth/calendar` and click **Authorize APIs**. Sign in with the calendar's Google account and allow access. If Google says the app is not verified, choose **Advanced** and continue; it is your own app.
7. In **Step 2**, click **Exchange authorization code for tokens**, then copy the **Refresh token**.
8. In WordPress open **Invoicing > Settings > Booking & Calendar > Google Calendar**. Tick **Enable Google Calendar sync**, paste the **OAuth Client ID**, **OAuth Client Secret** and **Refresh Token**, and set the **Calendar ID** (use `primary` for the main calendar).
9. **Save Settings**, then press **Test Google Calendar connection**. The status box turns green when Google accepts the keys.

Note: Google limits refresh tokens for apps left in **Testing** status, and they can stop working after about a week. Setting the consent screen to **In production** avoids that. For a personal app that only you use, no Google review is needed.

Where do I find my Calendar ID?

Use `primary` for the main calendar of the connected Google account. To use a different calendar, open Google Calendar on the web, hover over the calendar in the left list, click the three dots, choose **Settings and sharing**, and scroll to **Integrate calendar**. Copy the **Calendar ID**.

The status box says something is missing

The box lists exactly what is not saved yet: the enable tick, the Client ID, the Client Secret or the Refresh Token. The Refresh Token is a separate third value that comes from Step 2 of the OAuth Playground; it is not the same as the Client ID or Secret. Fill in whatever is listed and save.

The test button shows an error from Google

- **invalid_grant**: the refresh token has expired or been revoked. Repeat steps 5 to 7 to get a new one (and make sure the consent screen is In production).
- **invalid_client** or **unauthorized_client**: the Client ID or Secret was copied wrongly, or the Playground was not set to use your own credentials.
- **redirect_uri_mismatch**: the authorized redirect URI must be exactly `https://developers.google.com/oauthplayground`.
- **Access Not Configured** or **API has not been used**: the Google Calendar API is not enabled for your project (step 2).
- **Not found**: the Calendar ID is wrong. Try `primary`.

The last error Google returned is shown in the status box, so you do not have to guess.

Why are my earlier bookings not on the calendar?

Only bookings made **after** sync is working are added. Earlier ones are not back-filled.

Do I need to install a Google library or SDK?

No. The plugin talks to Google directly, like its payment integrations, with no extra library to install.

7 QUESTIONS

Apple Calendar

See bookings on your iPhone, iPad and Mac, and block times you are busy.

What does the Apple Calendar integration do?

- **Out:** a private subscription link shows your confirmed bookings in Apple Calendar on your iPhone, iPad and Mac. Cancelled bookings disappear the next time Apple Calendar refreshes.
- **In (optional):** events on a calendar you share from Apple Calendar block those times from being booked.
- **For clients:** clients get an **Add to Calendar** button on their **My Upcoming Bookings** list.

There is nothing to sign in to. It uses private calendar links, so no Apple ID or password is ever stored.

How do I show my bookings in Apple Calendar?

1. In WordPress open **Invoicing > Settings > Booking & Calendar > Apple Calendar**, tick **Enable Apple Calendar integration** and save. Your private subscription link appears.
2. On your Mac or iPhone, open that settings page and click **Subscribe in Apple Calendar**. Confirm the subscription when Calendar opens.
3. Or add it by hand: on a Mac choose **File > New Calendar Subscription** in Calendar and paste the link. On an iPhone or iPad go to **Settings > Calendar > Accounts > Add Account > Other > Add Subscribed Calendar** and paste it (the menu wording varies a little between iOS versions).
4. Choose a name, and set **Auto-refresh** to **Every 15 minutes** so changes show up quickly.

Tip: Apple decides how often a subscribed calendar refreshes unless you change the auto-refresh option, so a new booking can take a little while to appear on a device set to a slower interval.

Will it show up on all my Apple devices?

If you subscribe on your Mac or iPhone using the calendar account that syncs through iCloud, the subscription normally appears on your other Apple devices that use the same iCloud account. If it does not, repeat the subscribe step on that device.

How do I block times I am busy in Apple Calendar?

1. In Apple Calendar, right-click (or tap the info button next to) the calendar you want to use and choose **Share Calendar**.
2. Tick **Public Calendar** and copy the link it shows.
3. Paste it into **2. Block times I am busy in Apple Calendar** on the plugin's settings page and save.

- Events on that calendar, including repeating ones, stop clients booking over them.
- Events marked **Free** are ignored.
- It only applies when staff scheduling is off.

Note: Anyone with that public link can view that calendar, so use one that only holds your availability.

How do I keep my subscription link private?

Treat the subscription link like a password: anyone who has it can see your bookings. If it gets shared by mistake, press **Create a new link** on the Apple Calendar settings. The old link stops working immediately, and you subscribe again with the new one.

I do not use Apple devices. Can I still use the feed?

The subscription link is a standard iCalendar (.ics) feed, so most calendar apps that can subscribe to a calendar by web address can use it, for example Google Calendar (**Other calendars > From URL**) and Outlook. Refresh timing is decided by the app you use.

Do I need both Google Calendar and Apple Calendar?

No. They are independent and optional. Use one, both or neither. Each one can also block booking times based on what is already on that calendar.

18 QUESTIONS

Clients, dashboards and shortcodes

Give clients a place to see their own invoices, and put the plugin on any page.

Do my clients need to log in to pay?

No. Every invoice has a secure View & Pay link that works without logging in. Logging in is only needed for pages that show a client their history, and for booking and shop purchases.

What is the client dashboard?

Put `[imc_client_dashboard]` on a page. A logged-in client sees only their own invoices, estimates and recurring invoices, with paid/unpaid status, balance due and PDF download. It uses their existing WordPress account. Each section (invoices, recurring invoices, subscriptions and estimates) can be collapsed and expanded, shows how many items it holds and starts collapsed; add `collapsed="no"` to show them open. When a client has an unpaid invoice or subscription payment, a red flag appears in the section heading (even while collapsed) showing how many and the amount due, with "overdue" if past due; the unpaid rows are marked in red. On narrow screens each invoice becomes a labelled card. `[imc_client_profile]` adds a read-only profile page with their contact details and websites; groups and internal notes are never shown to clients. To let clients change their own details, use `[imc_edit_profile]` (see below).

Can clients update their own profile?

Yes. Put `[imc_edit_profile]` on a page. A logged-in client can change their name, company, email, additional emails, phone, address, province, postal code, country and tax number. Choose the fields with `fields="phone,address_1,city"` or remove some with `hide="tax_number"`.

- Clients can never edit their internal notes, tax exemption, websites or groups.
- The list of editable fields is signed, so it cannot be widened by editing the page in a browser.
- An email address already used by another client is refused.
- Changing the email changes where invoices are sent. It does not change their WordPress login email.
- The province sets the taxes on future invoices.

Can I change how the client pages look?

Yes. Under **Settings > Templates > Client Area Template** choose one of eight designs: Clean White, Midnight, Forest Green, Sunset, Soft Lavender, Minimal Ink, Ocean Gradient or Bold Pop. It styles the client dashboard, profile, edit profile, bookings, purchases and projects pages. Override it on one page with `template="midnight"`, using the template's key.

Is my client data secure and encrypted?

The plugin runs on your own WordPress site, so client records and invoices are stored in your own database on your own hosting. Here is exactly what is protected, and how.

- **Encrypted in the database:** payment gateway keys (Stripe, PayPal, Square, Helcim, Moneris), Google Calendar credentials, the reCAPTCHA secret, and the tax or business numbers on clients and payroll workers. They are sealed with libsodium (or AES-256-GCM) using your site's secret keys. Values saved by older versions are sealed automatically when you update.
- **Card numbers are never handled by the plugin.** Payments go through your gateway's own checkout or card form, so no card data is stored on your site.
- **Not encrypted field by field:** names, emails, addresses and invoice amounts are stored as normal WordPress data. They are protected by your host, your database access, your admin logins and your backups, as with any WordPress plugin.
- **Links and files:** View & Pay links are signed and cannot be guessed. Invoice and estimate PDFs are created in private, unguessable folders with direct access blocked, and deleted after an hour.
- **Who can see what:** a client only ever sees their own records. You can limit any shortcode to certain roles, and staff pages need invoice-management permission.

For the best protection, use HTTPS on the whole site, two-factor login for admins, encrypted backups, and keep WordPress up to date. If you change the secret keys in `wp-config.php`, saved gateway keys cannot be read and must be entered again. For a key of your own, add `define( 'IMC_ENCRYPTION_KEY', 'a long random string' );` to `wp-config.php` before saving keys, and keep it in your backups.

How is a WordPress user linked to a client?

Every new WordPress account is linked to a client record automatically (a new one is created if none matches their email). For a client added before they had an account, link them by hand on the client's edit screen.

What shortcodes are available?

- `[imc_client_dashboard]`, `[imc_client_profile]` and `[imc_edit_profile]`: the client's own invoices, profile and a form to update it
- `[imc_add_client]`, `[imc_add_invoice]`, `[imc_add_estimate]`: add records from the front end (authorized users only)
- `[imc_book_service]` and `[imc_my_bookings]`: booking and upcoming bookings

- `[imc_shop]` and `[imc_my_purchases]`: the shop and a client's purchases
- `[imc_my_projects]`: a client's projects, with progress bars, invoices and activity
- `[imc_form id="1"]`: one of your forms

Every one accepts `align="left"`, `"center"`, `"right"` or `"full"`, for example `[imc_book_service align="center"]`. A site-wide default is set under **Settings > Company & General**.

Can I limit a shortcode to certain WordPress roles?

Yes. Every shortcode accepts role attributes, for example `[imc_shop roles="customer,wholesale"]`.

- `roles="editor,customer"` shows it only to those roles. You can use a role's name as shown under Users (`roles="MSP Client"`) or its slug. Separate several roles with commas. Add `guest` to include logged-out visitors.
- `hide_roles="subscriber"` hides it from those roles. It wins if a role is in both lists.
- `denied="hide"` shows nothing to everyone else. Otherwise they see a short notice. Write your own with `denied_message="Members only"` for logged-in users without access and `guest_message="Please log in"` for logged-out visitors. To put a link in a message inside a shortcode, write `{Contact us|https://example.com/contact}`, because square brackets and double quotes would end the shortcode early.
- To change the wording everywhere at once, use Settings > Templates > Access Messages. There you can write one message for logged-out visitors and one for logged-in users without access, with links as `[text](url)` or normal HTML, plus `{login_url}` and `{register_url}`. The login prompts on the booking, dashboard, projects and purchases shortcodes use the logged-out message too.
- Administrators always see the shortcode, so you can preview your pages.

Roles control who sees the content on the page. The plugin still checks its own permissions when something is saved: staff shortcodes need invoice-management permission, and client shortcodes only work on the logged-in client's own record.

How do I spot new registrations and delete spam clients in bulk?

Open **Clients**. Anyone who registered recently appears in a highlighted **New clients** section above the rest, newest first, with how long ago they signed up. Use the "New:" drop-down to choose 24 hours, 3, 7, 14 or 30 days. Tick the clients you want (or the box in the table header to tick them all), choose **Bulk actions > Delete selected** and click Apply. You are asked to confirm, and deleting is permanent. Once you have reviewed the new sign-ups, click **Mark all as seen** to move them to the main list; the New section then shows only people who register after that.

Can I import or export my clients?

Yes. Go to **Clients > Import / Export**. **Export** downloads all clients (or one group) as a CSV file that opens in Excel or Google Sheets, including their groups and tax numbers. **Import** takes a CSV with a header row; download the empty template to see the layout. Clients are matched by email: you choose to skip existing ones or update them (blank cells never erase existing data, and groups are only added). Groups named in a Groups column (separate several with a semicolon) can be created automatically. A test run is ticked by default so you can see what would happen before anything changes. Up to 5,000 clients at a time. Nobody is emailed by an import.

What do logged-out visitors see on a service category's booking page?

Each service category has its own booking shortcode. Visitors who are not logged in see a notice with a Log in link (the username and password fields are hidden unless you tick "Also show the WordPress login form" in Settings > Templates > Access Messages): by default "Please log in to book (category name) services", plus a Create-an-account link when registration is open. To change it, edit the category under **Services** and fill in "Message for visitors who are not logged in". Links work, for example `[Register](https://example.com/register)`, and you can use {category_name}. A `guest_message=""` on the shortcode itself overrides the category message, which overrides the site-wide message in Settings > Templates > Access Messages.

What happens to submissions the spam filter catches?

They are held in **Forms > Spam**. Each entry shows the sender, a preview of the message, the IP address and why it was held (for example a gibberish name, a phone number that is too short, a low reCAPTCHA score or the hidden trap field). No client is created and nobody is emailed. If a real person was caught by mistake, tick the entry and choose **Release** to save it as a normal submission. The newest 200 are kept. The sender always sees a normal thank-you, so bots do not learn what was blocked.

Can visitors be asked to confirm their email before a form is accepted?

Yes. Edit the form and tick "Ask visitors to confirm their email before their message is sent". After submitting, visitors who are not logged in receive an email with a link. Nothing reaches you, and no client is created, until they click it (it works for 48 hours). This stops almost all automated spam. The form needs a name and an email field.

Where does a client record come from, and which IP created it?

Every client records whether it was added by an admin, a CSV import, a website form or a WordPress sign-up, plus the IP address that created it. You see it at the bottom of the client's edit screen and under each person in the **New clients** list. WordPress sign-ups are also spam-checked: blocked words and domains, lookalike or gibberish names, and a limit of 3 sign-ups per visitor per hour. A spam sign-up gets no client record and is held in the Spam tab for you to release or delete.

What are client groups?

Colour-coded groups (for example VIP or Wholesale) let you filter your client list and send a form to a whole group at once. A client can belong to more than one group.

Can clients be added to a group automatically by their email domain?

Yes. Edit a group under **Client Groups** and list one or more domains, such as `acme.com`, in "Auto-add clients by email domain". Every new client whose email ends in that domain (or a subdomain) joins the group automatically (tick **Exact domain only** if subdomains such as mail.acme.com should not count), whether you add them, they book online or they fill out a form. Nothing is ever removed from a client, and public providers like gmail.com and outlook.com are refused so strangers are never grouped together. Use **Apply to existing clients** to add current clients that already match.

Can my forms and the client dashboard go full screen?

Yes. The client dashboard, My Bookings, My Purchases, My Projects, and the New Invoice, New Estimate and New Client forms all show a **Full screen** button. Press Esc or the button to go back. Add `fullscreen="off"` to a shortcode to hide it, or `fullscreen="open"` to start full screen. The Client Profile, Edit Profile and Shop shortcodes can have it with `fullscreen="button"`.

Will the New Invoice and New Estimate forms fit a narrow column?

Yes. In a sidebar, a narrow column or a pop-up, each line item becomes a compact card with Description, Qty, Rate, Taxable and Amount labelled clearly, instead of a cramped table. In wide spaces it stays a normal table.

9 QUESTIONS

Projects

Track a piece of work for a client, and let them follow it.

What are projects?

A project is a piece of work for one client, for example a website redesign. Under **Invoicing > Projects** you give it a title, a client, a status (Not started, In progress, On hold, Completed or Cancelled), start and due dates and a description. A **percent complete** slider fills a progress bar, and everything that happens is added to a record of activity.

Setting the percentage to 100 marks the project Completed, and choosing Completed sets it to 100. Any percentage above 0 on a project that has not started moves it to In progress. The percentage is set by you; it does not change by itself.

How do I link invoices to a project?

1. When you create a project, choose the client and a list of their invoices that are not on a project yet appears. Tick the ones that belong and press **Create project**.
2. Later, open the project and pick an existing invoice for that client under **Invoices**, then press **Add to project**. Or press **+ New invoice for this project** to start an invoice with the client and project already filled in.
3. You can also choose the project in the **Project** box on any invoice.
4. The project lists its invoices with the total and the balance still owing. **Take off project** removes one without deleting it.

An invoice can only be on a project that belongs to the same client, so a client can never see another client's invoice. If you change an invoice's client, it comes off the old client's project.

How does a client follow their project?

Put `[imc_my_projects]` on a page. A logged-in client sees only their own projects, each with its status, a bar that fills to the percent complete, dates, linked invoices (drafts are never shown, and each has a View / Pay link) and the activity record.

- `project="12"` shows one project (it must be theirs)
- `status="active"` shows open projects; also `completed`, `all` (includes cancelled) or a single status such as `in_progress`
- `show_invoices="no"`, `show_activity="no"` and `show_tasks="no"` hide those parts
- `activity_limit="5"` sets how many activity lines show per project

You can also turn off invoices for one project by clearing **Show this project's invoices to the client** on its edit screen. The page follows your client area template and accepts `align` like every shortcode.

Can I limit the projects page to certain roles?

Yes. `[imc_my_projects]` accepts the same role attributes as every shortcode, for example `[imc_my_projects roles="MSP Client"]`, `hide_roles="subscriber"` or `denied="hide"`. Roles only decide who sees the page; a client who gets in still sees only the projects on their own client record.

Can more than one client follow a project?

Yes. On the project screen, **Additional clients** lists every client; tick the ones who should follow the project. They see it on their own `[imc_my_projects]` page with the progress bar, completed tasks and the activity you have marked for clients. They never see the invoices, which stay with the main client, and your internal notes and tasks stay private.

Additional clients are **not emailed by default**. You have two ways to include them:

- **Manually:** on **Email update**, the **Send to** list shows the main client and each additional client. Tick exactly who should get it, even just one additional client.
- **Automatically:** tick **Email automatically** next to a client and they are copied on the project-started email and are ticked on every update by default (you can still untick them).

Each person gets their own email addressed to them, and every send is recorded per recipient in the project's email list.

Can I get a copy of project emails, or include people who are not clients?

Yes, both are on the project screen.

- **Email project updates to the admin:** tick it and the site admin gets a copy of every project-started and update email, including the completed tasks listed in it.
- **External email addresses:** type any other addresses, separated by commas or new lines, for example a partner, subcontractor or accountant. They get the same copies of notification and task update emails. They are not clients and never get access to the project page.

Copies are separate emails, so client addresses are never shown to the admin or external recipients, and each copy starts with a short note saying who the update went to. On **Email update** a tick box lets you include or skip the copies for that one send, and every copy is recorded in the project's email list.

Can I record finished tasks and send them in a report?

Yes. On the project screen, **Completed tasks** lets you type the work you have finished, one task per line, with the date it was done. Tick **Show these to the client** and they appear under **Completed tasks** on the client's project page; leave it unticked to keep them internal.

When you press **Email update**, choose what to list: **only tasks added since the last update** (the default, so each report shows just the new work), **all completed tasks**, or **no tasks**. The email shows the tasks as a checklist with their dates, then the progress bar and recent activity. Internal tasks are never emailed, and the Tasks table shows which ones have been reported.

What does the client get by email?

- **Project started:** sent automatically the first time a project becomes In progress, if **Email the client when work on this project starts** is ticked. Putting a project on hold and resuming it does not send it again.
- **Project update:** press **Email update** on a project, with an optional note. The email has the progress bar, the status and the activity record the client is allowed to see.

Both can be reworded under **Settings > Email & Reminders**. Under **Settings > Company & General > Projects**, enter the page that holds `[imc_my_projects]` and the emails add a **View Your Project** button.

What is in the activity record, and what can the client see?

Each project logs when it was created, when work started, every change of progress or status, invoices added, completion, notes, and every update emailed. Internal notes stay private; tick **Show this note to the client** to share one. The client sees only the lines marked for them, in the project page and in update emails.

The project screen also lists every email sent for it, with the date, the address and whether it was sent manually (with the staff member's name) or automatically.

8 QUESTIONS

Forms

Intake forms and questionnaires, emailed or embedded.

How do I build a form?

Go to **Invoicing > Forms** and click New Form. You can start blank or from a ready-made form: Contact Us, Free Estimate, Partner Application, MSP Application or Website Intake Form. A starter is just a normal form, so change, add or remove anything. Choose from ten field types: short text, long text, email, phone, number, date, drop-down, radio buttons, checkboxes and a single tick box. Mark fields required, and set each field's width (full, half, third or two-thirds) so fields sit side by side. A live preview updates as you type. To reuse a form, click **Duplicate** on the Forms list; the copy keeps the fields and settings, starts Inactive, and has none of the original's submissions.

How do clients receive a form?

- **Email it:** choose one client, several, or a whole group. Each gets a personal link, so their answers are filed under their name.
- **Email people who are not clients:** type or paste any email addresses. Their answers create a client record from the email, or match an existing one. A **Sent so far** list shows who has replied; you can resend, or remove recipients one at a time or in bulk.
- **Embed it:** put `[imc_form id="1"]` on any page. Visitors are matched by login, or by the name and email they enter.

Where do I see answers?

On **Form Submissions**. Clients are listed with a count of forms submitted, and a red **new** badge marks submissions you have not opened. Click a form to expand its details instantly; opening it marks it read. There are Expand all and Collapse all buttons, and the admin menu shows a count of unread submissions.

Can I change how forms look?

Yes. Under **Forms > Design** choose one of eleven templates (Clean, Midnight, Aurora, Minimal, Bold, plus the warm and cozy Hearth, Cocoa and Blush, and Meadow, Ocean and Executive), an accent colour, corner roundness, maximum width, submit button text and position, and whether to show the form title. You can add your logo from the Media Library or by uploading one. In the form editor you can also pick the colour of a form pop-up button (and its text) with a colour picker. On the dark designs (Midnight and Cocoa) the logo sits on a soft light plate so a dark logo stays readable; change this with the Logo background option. Each form can also have its own text colour in the form editor. The design applies to every form, in emails and on pages. Override the template on one page with `[imc_form id="1" template="midnight"]`. Forms shown as a pop-up also have twelve button designs to pick from (Pill, Rounded, Outline, Gradient, Soft tint, 3D press, Glow, Arrow, Sharp block, Bubble, Underline and Shine) under **Forms > Design > Pop-up button design**, then change the design and colour on any single form in the form editor, or override per shortcode with `buttonstyle="pill"`.

How do I stop spam on my forms?

Every form has built-in spam filtering, on by default: a hidden trap field, a minimum fill-out time, a per-visitor rate limit, a cap on links, blocked words and email domains, smart checks for gibberish names and bad phone numbers, and a check for names that mix lookalike Cyrillic or Greek letters. Spam gets a normal-looking thank-you but is not saved as a submission and never creates a client record; it is held in the Spam tab so you can review it. Adjust it under **Forms > Settings > Spam protection**, which also shows how many were blocked. Logged-in clients and emailed form links are never filtered. For stronger protection add Google reCAPTCHA: under **Forms > Settings** choose v2 (the "I'm not a robot" checkbox) or v3 (invisible, score based) and paste your site and secret keys from google.com/recaptcha/admin. A step-by-step setup guide is built into Forms > Settings. Then tick reCAPTCHA on each form that should use it. The keys are shared; the on/off switch is per form.

Can a form open as a pop-up?

Yes. Tick **Show this form as a pop-up** on the form and give the button text (for example "Request a quote"). The form appears as a button on the page and opens in a pop-up. The button, window and backdrop wear the same look as the form (Clean, Midnight, Aurora, Minimal or Bold). Choose the look for each form with **Look of this form**, or leave it on the site default from **Forms > Design**. You can also add `popup="yes"` and `button="Your text"` to the shortcode, or link to the form's pop-up link from your own button or menu item (the form must be on the same page).

Can I align a form or add a picture to it?

Yes, per form. Set the alignment to left, centre, right or full width. Add an image from your Media Library and place it above the form, or to its left or right. Side-by-side layouts stack on phones.

What can I control in Forms > Settings?

- Email notifications to you, and an optional copy to the person who submitted
- A redirect URL after submitting
- Requiring login for forms on pages
- Limiting each client to one submission per form
- A Custom CSS box

4 QUESTIONS

Shop, licences and subscriptions

Sell downloads, licence keys and recurring products.

Can I sell my own products?

Yes. Add products under **Invoicing > Products** (upload a file and/or add licence keys), turn on the digital shop under **Settings > Company & General**, and put `[imc_shop]` on a page. A purchase creates an invoice, and the file or key is released only once the invoice is paid in full. Every product gets a permanent product code such as PRD-0001.

Can a product bill on a schedule?

Yes. Make a product recurring (weekly, biweekly, monthly, quarterly or yearly). It bills automatically and can stop after a price cap and/or an end date. If you turn it on, it can also be cancelled automatically when an invoice goes a chosen number of days past due. Manage them under **Invoicing > Subscriptions**, and let clients see theirs with `[imc_my_purchases]`.

How do licence keys work?

Flag a recurring product as a licensed plugin and a licence is issued automatically on the customer's first payment. It follows their subscription, and you choose whether cancelling limits or fully deactivates it. When payments reach the price cap it becomes a permanent lifetime licence bound to that customer and, once activated, a single domain. Manage them under **Invoicing > Licenses**; a plugin you sell can activate, deactivate and validate itself against the licence over the built-in REST API.

When are a client's websites added to their profile?

Websites entered when buying a product are kept on the purchase and invoice notes, and are added to the client's profile only once the invoice is paid in full. The product's ID is attached to that website line.

5 QUESTIONS

Emails and branding

Every message the plugin sends, in your voice.

Can I change the wording of the emails?

Yes. Under **Settings > Email & Reminders** you can edit the subject and message of all 15 automatic emails: invoices, estimates, reminders, late fee notices, receipts, purchases, booking warnings and cancellations, subscription cancellations, the form invitation, and the project started and project update emails. Use placeholders like `{client_name}` and `{invoice_number}`, and HTML if you want it. Until you change one, it keeps its built-in wording.

Can I change how the emails look?

Yes. Pick one of four layouts (Simple, Classic Card, Modern Header, Minimal), set an accent colour, upload an email logo (it falls back to your company logo) and add a signature. Buttons can be Solid, Rounded, Pill, Square, Outline or Soft tint, in your choice of size, and you set the wording of the Pay button (default "Pay Now").

Can I see which emails were sent for an invoice, and whether they were manual or automatic?

Yes. Every invoice has an **Email history** card listing each notice emailed for it: the invoice itself, upcoming-due and overdue reminders, late fee notices and payment receipts. Each line shows the date and time, the address, whether it was delivered to the mail server or failed, and how it was sent.

- **Manually** (with the staff member's name): you pressed Send, saved and sent, emailed in bulk, or recorded a payment.
- **Automatically:** reminders, late fee notices, recurring invoices sent by their profile, invoices from bookings, shop purchases and subscriptions, and receipts from online payments.

Emails sent before this was added show as Not recorded. Delivered means your mail server accepted the message, not that it was opened.

Can I preview an email before it goes out?

Yes. Press **Preview** next to any email, or **Send Test** to email it to yourself. Both use your saved settings, so save first.

What if a client's mail app hides the buttons?

Every email about an invoice or estimate also ends with a plain link below your signature, shown as words (default "View your invoice online"), so clients can always get to their invoice.

3 QUESTIONS

Reports, expenses and payroll

Numbers ready for your accountant.

What reports are included?

Invoice, estimate, payment, client and expense reports, plus a Q1 to Q4 quarterly report for any year, all under **Invoicing > Reports**. Filter by quick date presets or a custom range, and export to CSV or PDF.

Can I track expenses?

Yes. Record expenses by date, category, vendor and tax paid, attach receipts, and see a category breakdown in the Expense Report.

Does it handle payroll?

It tracks pay for staff and sub-contractors, keeps payroll reports with T4 and T4A tracking, and can post paid entries to your expenses automatically. It is a record-keeping tool, so check your payroll rules with your accountant.

4 QUESTIONS

Troubleshooting and support

When something does not behave the way you expect.

Reminders or automatic emails are not going out

- Reminders, late fees and recurring invoices run from a daily WordPress background task (WP-Cron). On a very quiet site that task only runs when someone visits, so a busy site or a real server cron job is more reliable.
- Check that automatic sending is turned on under **Settings > Email & Reminders**.
- If WordPress email in general is unreliable on your host, install an SMTP plugin so mail sends from your own address.

A client sees a login form or "no client linked" message

Pages like the dashboard, booking and shop need a logged-in WordPress user who is linked to a client record. Link the user on the client's edit screen.

My shortcode shows nothing or the wrong alignment

Check the shortcode name and quotes, and that the matching feature is switched on (for example **Enable online service booking** or **Enable the digital shop**). For alignment add `align="center"` or set the site-wide default in Settings.

How do I get help or see it in action?

We are happy to walk you through it. Ask for a live demonstration or send us your question.

Still have a question?

We would be happy to show you the plugin running and answer anything that is not covered here.

Ask for Live Demonstration