|  |  |
| --- | --- |
|  |  |
|  |  |
| <https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php> |  |
| Knowledge BaseWe are here and ready to help Instantly find the answer to more than 500 questions. If that doesn’t help, Create a Ticket or start a Live Chat and we will be glad to help. |  |
| |  |  |  |  | | --- | --- | --- | --- | | **Basic Overview** Lead the basics of PnaPnaTech.  Learn the Basics | **Projects** Get Started with Your First Project.  How to add a project? | **Projects** Creating a Lead.  How to create a lead effectively? | **Projects** Crafting an Effective Proposal. How to create a compelling proposal? | | **Invoice** Creating an Invoice Made Simple.  How to create an invoice efficiently? | **Estimates** Estimating a Project Effectively.  How to estimate a project effectively? | **Payment** Making a Payment: A Step-by-Step Guide.  How to make a payment efficiently and securely? | **HR** Adding an Employee to Your Team.  How to add an employee? | |  |
| How can we help you today? Our Knowledge Base contains the answers to more than 500 previously asked questions. |  |
| |  |  |  | | --- | --- | --- | | **Projects** [Add New Project Status](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [New Project](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Project Discussion](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Timesheets](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Manually linking invoices to Project](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Pin Projects](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Projects Activity](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Finance Overview](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Disallow project members to see all project tasks](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php) | **Tasks** [Create New Task](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Add New Task Status](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Disallow project members to see all project tasks](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Copy Task](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Linking tasks to features](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Recurring Tasks](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Add task assignees](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Task Timesheets](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Bill Tasks](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php) | **Modules** [Introduction to PnaPnaTech CRM modules](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Module Basics](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Module File Headers](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Create Menu Items](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Common Module Functions](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Module Security](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Module as Payment Gateway](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Working With Forms](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Preparing Module Upgrade](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Module Language](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php) | | **Customers** [Sending proposal to customer or lead](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [New Customer Contact](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [New Customer](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Send contact set password link](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Customer Reminder](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Customer Overview](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Customer admins](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Customers Registration](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Reports](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php) | **Proposals** [Create proposal](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Proposals Templates](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Proposal expiration reminders](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Sending proposal to customer or lead](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Converting proposal to estimate/invoice](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php) | **Invoices** [Merging Invoices](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Invoice Overdue Notices](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Record Invoice Payment](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Send Invoice to Email](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Recurring Invoice](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Create Invoice](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php) | | **Estimates** [Link Estimate To Project](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Send Estimate to Email](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Converting Estimate To Invoice](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Create Estimate](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Converting proposal to estimate/invoice](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php) | **General/Setup** [Tracking Sent Emails](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Add Items/Products](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Currencies](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Subscriptions](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Tax Rates](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Payment Modes](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Add currencies in total to the words feature](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php) | **Support Tickets** [Email Piping / Auto Importing Tickets](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Setup Ticket Form](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Departments](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Ticket Services](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Auto Close Tickets](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Ticket Email Templates](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Allowed file extensions](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php) | | **Expenses** [Record Expense](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Expense Reports](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Billable Expense](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Creating Recurring Expense](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Converting Billable Expenses to Invoice](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php) | **Contracts** [Contracts Templates](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [New Contract](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Contract Expiry Notification](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Renewing Contract](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php) | **Knowledge Base** [New Knowledge Base Article](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [Disabling Knowledge Base](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php)  [New Knowledge Base Group](https://sanjana.hubetc.com/bootstrap/kb.pnapnatech.com/knowledge_base.php) | |  |