

CRM Installation Guide

Welcome to the Installation Guide. This document provides comprehensive steps to install and configure your CRM system for optimal performance.

1. Server Setup

Before installing CRM, ensure your server meets the following requirements:

- Apache Web Server with `mod_rewrite` enabled.
- PHP 7.2 or higher, with the `gd2` and `curl` extensions installed.
- MySQL 5+, ensuring the `ONLY_FULL_GROUP_BY` SQL mode is disabled.

Additionally, create a MySQL database and user with full privileges on the database. Import the `resources/dump.sql` file into your newly created database to set up the initial schema.

2. Web Application Setup

2.0 Domain and Application Name Configuration

Modify the `pb_settings` table in your imported database to include your domain name under `resource_url`, excluding `"www"` and `"http://"` or `"https://"`. For example: `app.mycrmdomain.com/`.

2.1 Script Database Configuration

Unzip the `resources/additional_files.zip` file and copy the contained files and folders to the root directory on the server, maintaining the same directory structure as found in the archive

Set permission 777 for `files/`(both) and its contents for proper operation.

Update the database settings in `httpdocs/includes/dbsettings.php`, `knowledgebase/includes/dbsettings.php` and `landing/includes/dbsettings.php` with your MySQL details:

- `$nameDB` - Database name
- `$userNameDB` - Database username
- `$userPasswordDB` - Database password

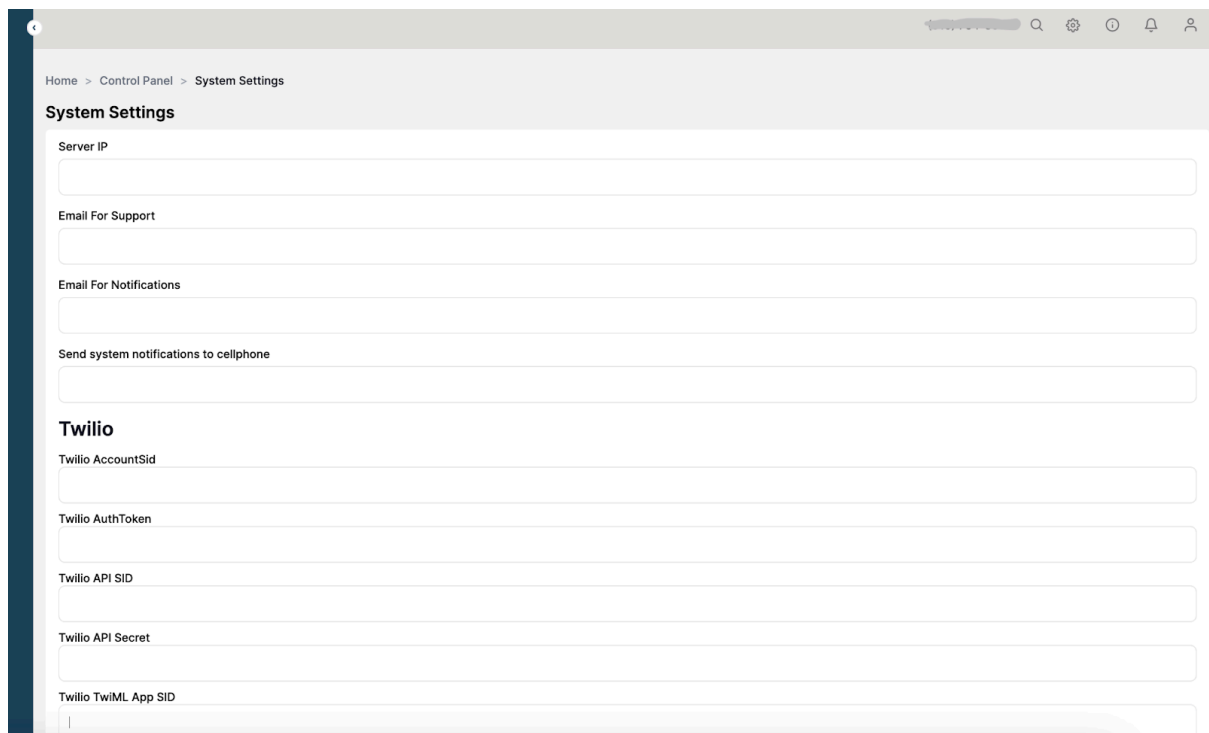
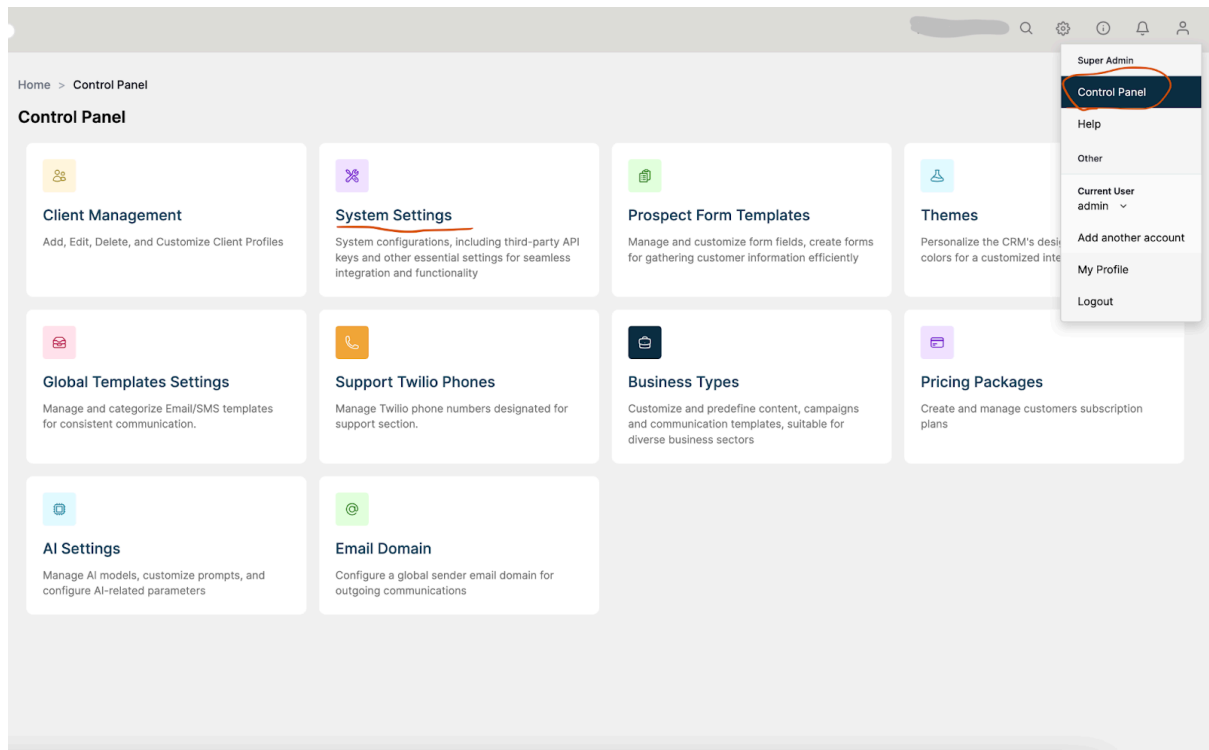
2.2 Cron Task Setup

Configure the following cron tasks using the specified syntax. Replace **LINUXUSER** with your server's username and **FULL_PATH** with the full directory path to your CRM installation.

```
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=cronimportsequencecustomers
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=cronimportcustomers
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=cron --d=minute
1 ***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=cron --d=hour
0 0 ***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=cron --d=day
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=mailqueue
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=cronphoneverifier
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=campaignqueue
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=croncampaignvoice
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=leadphonevalidator
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=cronwebhooks
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=fbqueue
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=paymentscheduler --d=process
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=bgtasks --d=run --index=1
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=emailparser
***** LINUXUSER php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=emailgrabber
***** LINUXUSER /usr/bin/php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=cronleadphoneverifier
***** LINUXUSER /usr/bin/php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=cronbuiltwithphoneverifier
***** LINUXUSER /usr/bin/php /var/www/vhosts/FULL_PATH/httpdocs/cli.php
--m=cronbuiltwithcompanychecker
***** LINUXUSER /usr/bin/php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=cronleadcompanychecker
***** LINUXUSER /usr/bin/php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=triggerexecutor
***** LINUXUSER /usr/bin/php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=triggerscheduledexecutor
***** LINUXUSER /usr/bin/php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=cronpromptsqueue
***** LINUXUSER /usr/bin/php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=croncustomercalltranscriber
***** LINUXUSER /usr/bin/php /var/www/vhosts/FULL_PATH/httpdocs/cli.php
--m=cronorganizationcalltranscriber
```

3. System Settings

After the installation, log in to your CRM web app (<https://app.mycrmdomain.com/>) using the default credentials (**username: admin**, **password: 111**) and navigate to **Admin** -> **Control Panel** -> **System Settings** to begin configuration.

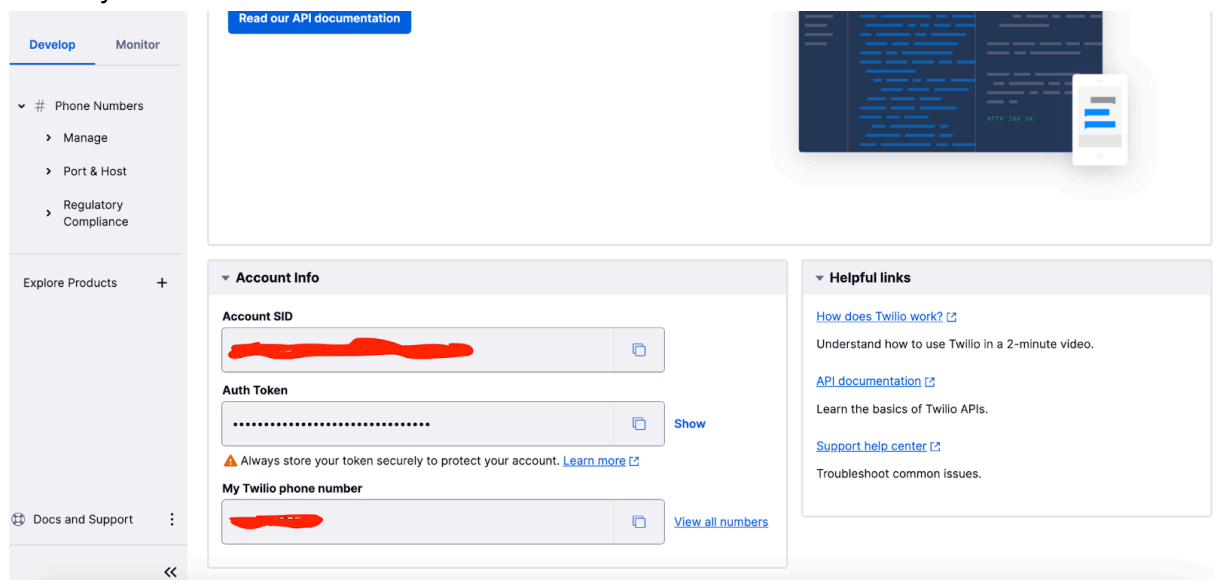


3.1 CRM Settings

- **Server IP:** Specify the IP address of the server where CRM is hosted. This is crucial for the Knowledgebase section of your CRM.
- **Email For Support:** Enter the email address that will handle support inquiries from users. This ensures that your team can provide timely assistance to users facing issues.
- **Email For Notifications:** Designate an email address to receive administrative notifications from CRM. This is essential for staying informed about system events, user activities, and other critical notifications.
- **Send System Notifications to Cellphone:** If you want to receive system notifications (by text messages), enable this option by providing a cellphone number.

3.2 Twilio Setup

- Obtain your Twilio Account Sid and Auth Token from the Twilio dashboard.



- Navigate to API keys & tokens under your Twilio account to create an API key, noting the SID and secret.

Auth tokens & API keys

Region Regional
United States (US1) - Default

API keys - United States (US1) - (recommended)

Create API key →

API keys are revokable credentials for the Twilio API. You can use API keys to authenticate to the REST API using basic auth with "user=KeySid" and "password=KeySecret". You can also use API keys to sign access tokens which are also used by our Real-Time Communications SDKs. Access tokens are short-lived credentials that can be distributed safely to client-side applications. [Learn more about API keys.](#)

API key	Type	Date created	Actions
---------	------	--------------	---------

- For TwiML setup, create a new app under **Phone Numbers -> Manage -> TwiML Apps** with the **Voice Configuration Request URL** set to <https://app.mycrmdomain.com/index.php?m=twilioclientvoice>

TwiML Apps

A TwiML Application is a set of URLs and other configuration data that tells Twilio how to handle incoming calls or messages. You can set the Request URL, Fallback URL and others on a TwiML App, instead of directly setting them on a phone number. You can then assign the TwiML App to multiple phone numbers. Any changes to the configuration data in a TwiML App are instantly applied to all phone numbers. [Learn more](#)

Filter Results

Friendly Name **Url**

TwiML App Name	Configuration
<div> <div>Develop Monitor</div> <div> <div> <div># Phone Numbers</div> <div> <div>Manage</div> <div>Active numbers</div> <div>Released numbers</div> <div>Buy a number</div> <div>Verified Caller IDs</div> <div>TwiML apps</div> <div>Port & Host</div> <div>Regulatory Compliance</div> <div>Alphanumeric Sender IDs</div> </div> <div> <div>Explore Products +</div> <div>Docs and Support</div> </div> </div> </div> <div> <div>TwiML apps /</div> <div> <div>Friendly Name</div> <div>app.mycrmdomian.com</div> </div> <div> <div>TwiML App SID</div> <div>AP4ad898c737180b3fedb34ae051633b48</div> </div> <div> <div>Voice Configuration</div> <div> <div>Request URL</div> <div>https://app.mycrmdomian.com/index.php?m=twi</div> <div>Call using Twilio Client</div> </div> <div> <div>Request Method</div> <div>HTTP POST</div> </div> <div> <div>Fallback URL</div> <div></div> </div> <div> <div>Request Method</div> <div>HTTP POST</div> </div> <div> <div>Status Callback URL</div> <div></div> </div> <div> <div>Request Method</div> <div>HTTP POST</div> </div> <div> <div>Caller Name Lookup</div> <div>Disabled</div> </div> </div> </div> </div>	

- Buy and configure a new Twilio number, setting it as the **default Twilio Number** and **System Company Twilio Phone** number in CRM System Settings.

Navigate: **Phone Numbers -> Manage -> Active Number -> Buy a Number**

Voice and Fax section -> Select Configure With TwiML App -> Select created Twiml app

Develop Monitor

Phone Numbers

- Manage
- Active numbers
- Released numbers
- Buy a number
- Verified Caller IDs
- TwiML apps
- Port & Host
- Regulatory Compliance
- Alphanumeric Sender IDs

Explore Products +

Docs and Support

Check the A2P 10DLC registration status of your phone numbers. Generate a CSV Report to view the A2P 10DLC registration status of your phone numbers and next steps to get your numbers in compliance. [Request CSV Report](#)

Please add an emergency address to this phone number or you may incur a \$75.00 charge per emergency call. [Add emergency address](#)

Voice Configuration

Routing [Regional](#)

United States (US1) Region call routing is: **Active**

[Go to other configurations](#)

Configure with

TwiML App

app.mycrmdomain.com

Emergency Calling ⓘ

Emergency Address is not registered. [Add Emergency Address](#)

Messaging Configuration

Messaging Section

A message Comes In -> webhook =
`https://app.mycrmdomain.com/index.php?m=receivesms`

Develop Monitor

Phone Numbers

- Manage
- Active numbers
- Released numbers
- Buy a number
- Verified Caller IDs
- TwiML apps
- Port & Host
- Regulatory Compliance
- Alphanumeric Sender IDs

Explore Products +

Docs and Support

Messaging Configuration

A2P 10DLC registration required for US messaging.

To send SMS/MMS messages to the US with this US local number, a registration process is required. [Learn more about A2P 10DLC registration](#) or [Check the A2P 10DLC registration status of your phone numbers](#).

[Initiate A2P 10DLC registration](#)

Routing [Regional](#)

United States (US1) Region message routing is: **Active**

Messaging Service

Low Volume Mixed A2P Messaging Service

[Low Volume Mixed A2P Messaging Service](#) will handle incoming messages to this phone number, using the SMS Handlers below. Remove this phone number from [Low Volume Mixed A2P Messaging Service](#)

Configure with

Webhook, TwiML Bin, Function, Studio Flow, Proxy Service

A message comes in

Webhook

URL

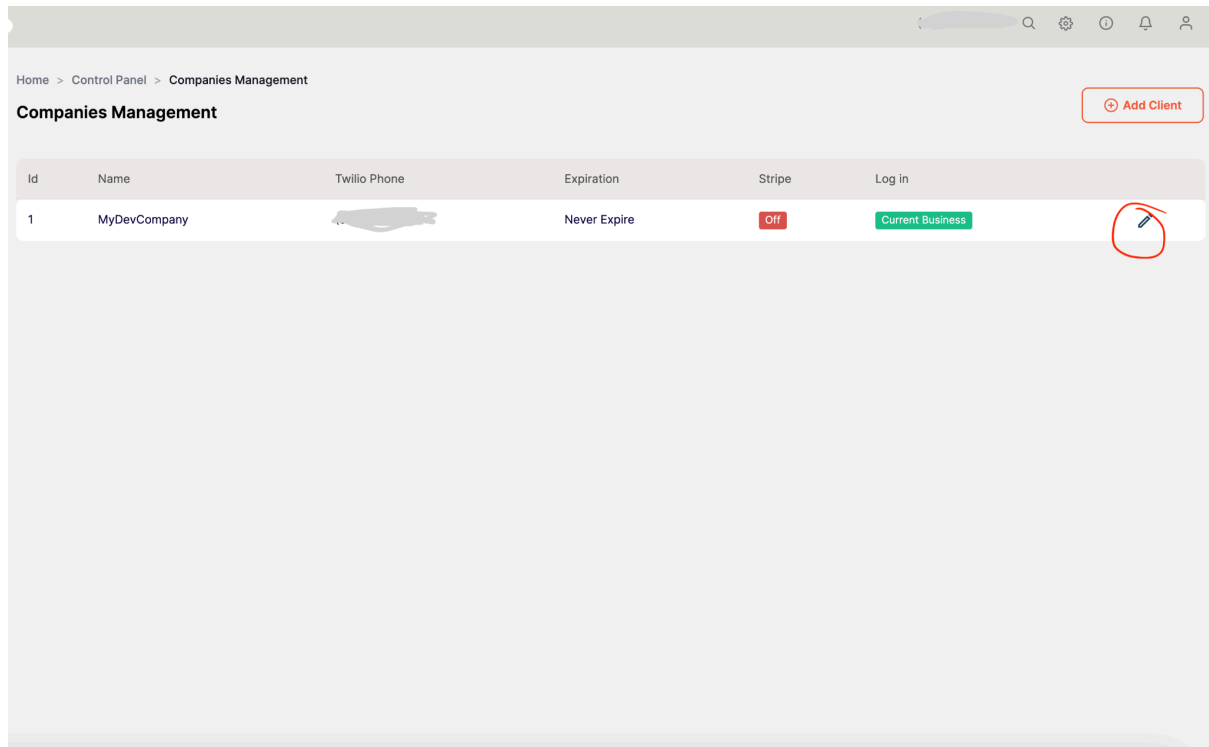
`https://app.mycrmdomain.com/index.php?m=receivesms`

HTTP

HTTP POST

You need to set this number as the default Twilio Number (CRM System Settings) and System Company Twilio Phone number

To update the system company, Navigate to **Admin -> Control Panel -> Client Management -> Edit Company #1**



Home > Control Panel > Companies Management

Edit

Business Name*

Business Type

General

Twilio Phone

Send system notifications to cellphone

Email

☒ Unsubscribe text for sequence messages

☐ Compliance messages

Expiration Date

0 - for newer expire

Message Limits

Email Messages Limit

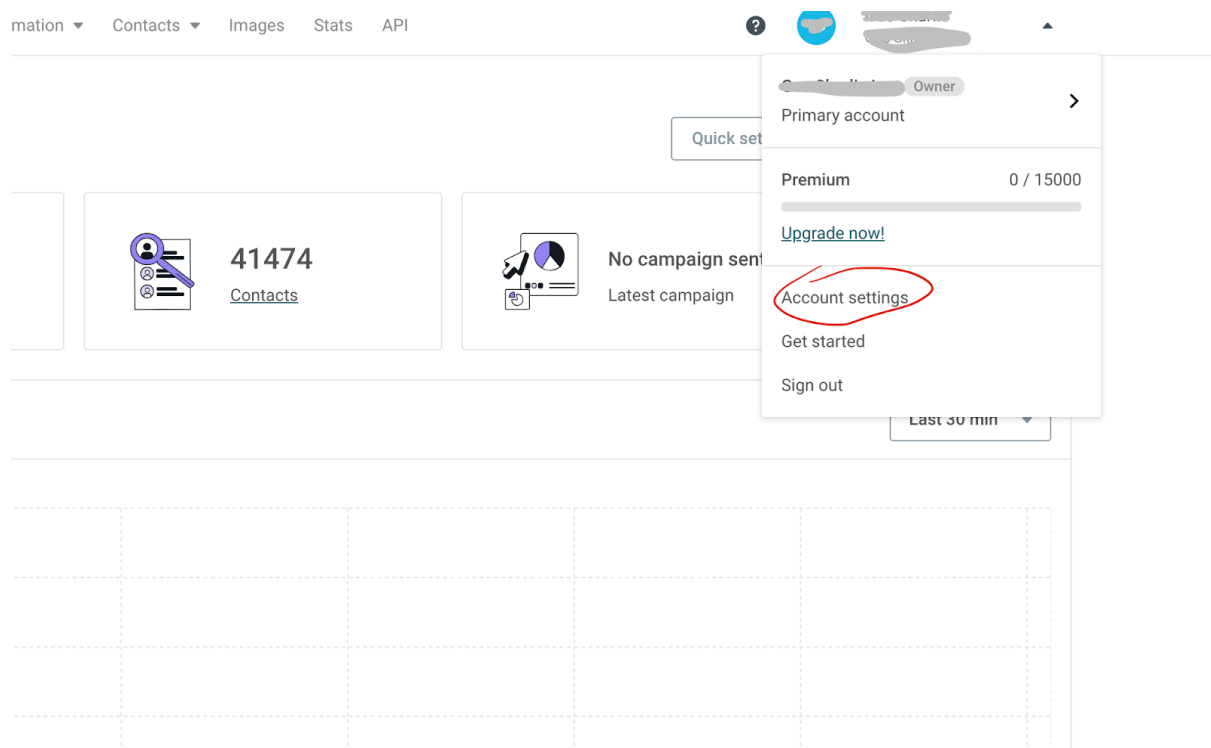
0 - for unlimited

3.2 Integrating Email Services







For effective email communication within CRM, you can configure either Mailjet or SendGrid as your email service provider. It's essential to set up one of these services to manage email campaigns, notifications, and support communication efficiently.

MailJet Setup

- Access your MailJet account to obtain your API keys.



Account Information

Senders and Domains Manage your domain and sender settings  Add a domain or sender address Setup SPF/DKIM authentication SMTP and SEND API settings	Account settings Enable tracking, display options in your dashboard & reports.  Account settings Email tracking settings Account sharing Two-factor authentication SAML Auth (SSO)	REST API Integrate Mailjet data directly in your application.  API Key Management (Primary and subaccount) Event notifications (webhooks) API Documentation
Profile Your personal & company information. 	Billing All about your monthly plan. 	App Connections Connect mailjet with your apps. 

- Configure Event Notification URLs for different email statuses (sent, open, click, bounce, etc.) to integrate with CRM.

`https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus
&type=open`

`https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus
&type=sent`

`https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus
&type=click`

`https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus
&type=bounce`

`https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus
&type=spam`

`https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus
&type=blocked`

`https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus
&type=unsub`

Account Information

Senders and Domains

Manage your domain and sender settings

[Add a domain or sender address](#)

[Setup SPF/DKIM authentication](#)

[SMTP and SEND API settings](#)

Account settings

Enable tracking, display options in your dashboard & reports.

[Account settings](#)

[Email tracking settings](#)

[Account sharing](#)

[Two-factor authentication](#)

[SAML Auth \(SSO\)](#)

REST API

Integrate Mailjet data directly in your application.

[API Key Management \(Primary and subaccount\)](#)

[Event notifications \(webhooks\)](#)

[API Documentation](#)

Profile

Your personal & company information.

[Billing](#)

All about your monthly plan.

App Connections

Connect mailjet with your apps.

Instead of making regular calls to our REST API to check for data updates, use our Event API for your system to be notified in near real-time when events happen. [Read our documentation.](#)

Trigger events

Select the events you want to track and specify the endpoint URL our server should call each time an event occurs. If you want to limit the number of calls, you can choose to group together events that occurred over the last second.

ⓘ

We recommend grouping events by ticking the options near "Group events" so that your endpoint URL is called only once per second instead of once per event.

Event

Open

Endpoint URL*

https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus&type=open

☒ Group events ⓘ

Send a test ⓘ

🗑

Apply url to all events

Event

Sent

Endpoint URL*

https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus&type=sent

☒ Group events ⓘ

Send a test ⓘ

🗑

We highly discourage tracking "Sent" events due to the amount of events it can trigger. Please select it only if required.

Event

Click

Endpoint URL*

https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus&type=click

☒ Group events ⓘ

Send a test ⓘ

🗑

Event

Endpoint URL*

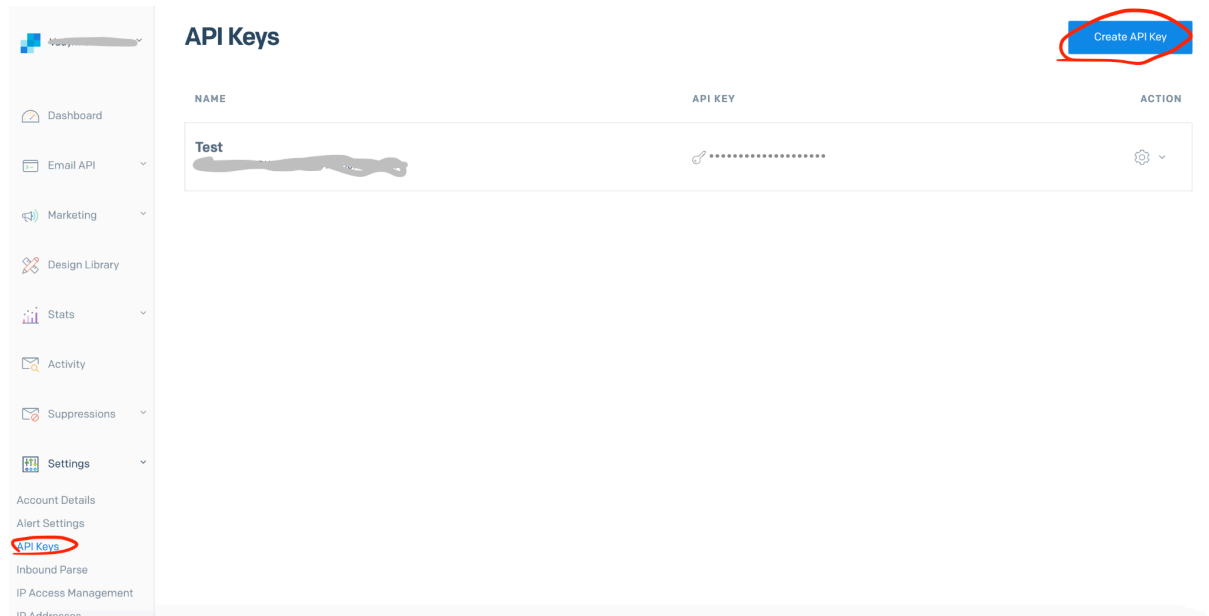
☐ Group events ⓘ

Send a test ⓘ

🗑

SendGrid

API Key: Generate a SendGrid API key from your SendGrid dashboard. This key authorizes PushbuttonCRM to send emails through your SendGrid account.



3.3. Google Places

<https://developers.google.com/maps/documentation/places/web-service/get-api-key>

Console Cloud SDK

- Go to the **Google Maps Platform > Credentials** page.
[Go to the Credentials page](#)
- On the **Credentials** page, click **Create credentials > API key**.
The **API key created** dialog displays your newly created API key.
- Click **Close**.
The new API key is listed on the **Credentials** page under **API keys**.
(Remember to [restrict the API](#) key before using it in production.)

A YouTube video thumbnail showing a woman in a blue t-shirt with a Google Maps logo. The text on the thumbnail reads 'How to generate and restrict A...', 'Generate & restrict API keys', and 'Google Maps Platform'.

3.4. BuiltWith API

Navigate to <https://api.builtwith.com/lists-api>

The screenshot shows the BuiltWith Lists API dashboard. At the top, there's a navigation bar with links like Reports, Tools, Plans, Customers, Account, and Help. Below this, the main header includes 'BuiltWith Lists API' and 'JSON and XML Technology Usage Lists'. A sidebar on the left lists various API endpoints like Overview, Domain, Bulk Drop, Bulk FTP, Free, Lists, Rel, Tags, Social, Redirects, Keywords, Trends, Company, Firehose, and Live. The main content area displays 'List Credit Usage' with a table showing 'Max Base Techs' at 50 and 'Used' at 0. Below this, it shows 'Your API Key' as 80164f5e-e616-4cbe-b201-f7256876c4fb. The 'Introduction' section states that the API provides XML and JSON access to lists of websites using particular web technologies across the entire internet.

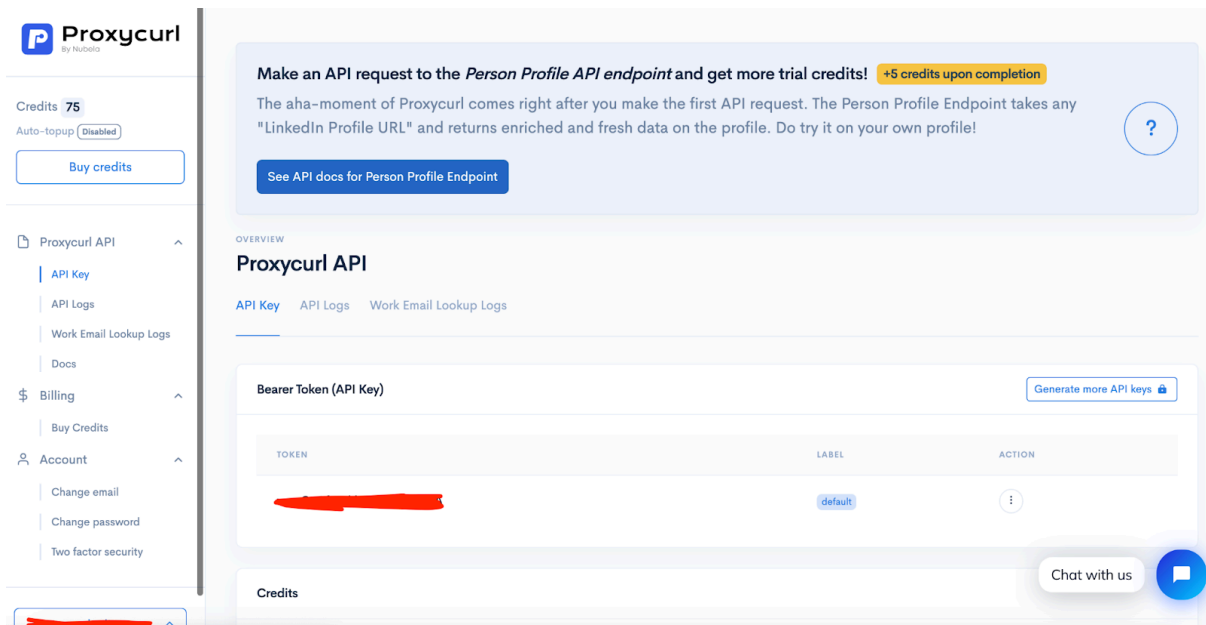
3.5. Lob API

Navigate to <https://dashboard.lob.com/settings/api-keys>

The screenshot shows the Lob dashboard settings page. The left sidebar contains navigation links for Overview, Mail Analytics, Address Book, HTML Templates, Address Verification, Print & Mail, and Webhooks. The main content area is titled 'Settings' and has tabs for Account, User, API Keys, Team, Payment, Editions, and Invoices. The 'API Keys' tab is selected, showing 'API Version' (Global Version: 2020-02-11, Latest Version) and 'Secret API Keys' (Live Environment and Test Environment, both with redacted keys and 'Copy' buttons). Below this, 'Publishable API Keys' are shown (Live Environment, redacted key, 'Copy' button). A 'Support' button is visible at the bottom right.

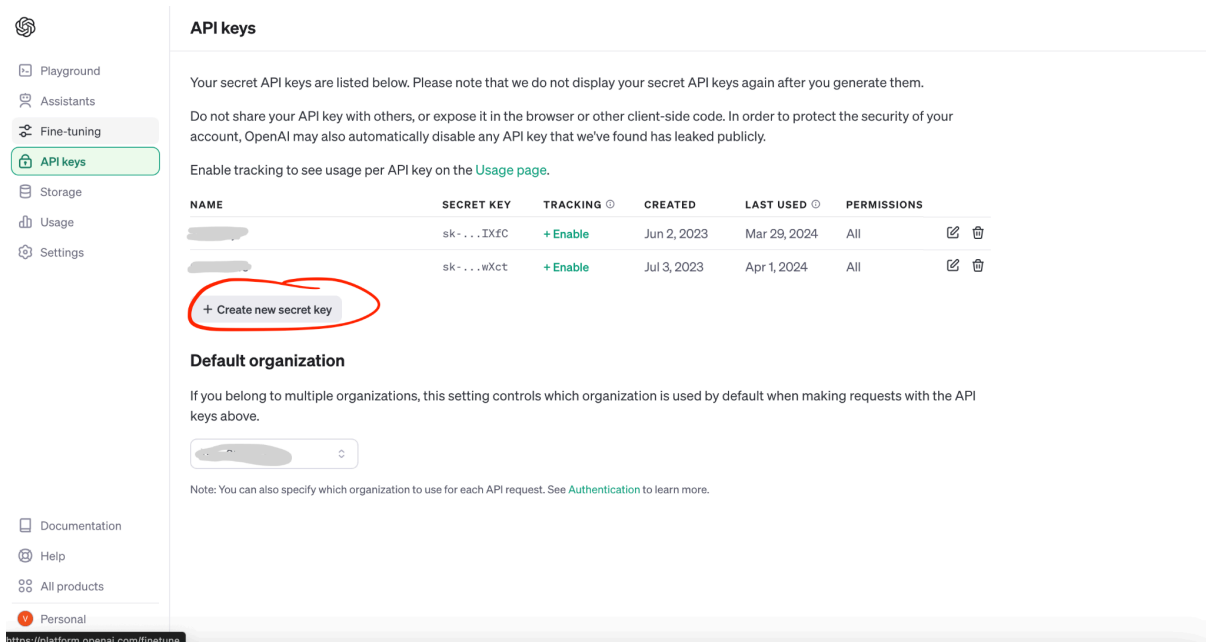
3.6 ProxyCurl API

Navigate to <https://nubela.co/proxycurl/dashboard/proxycurl-api/api-key/>



3.7 OpenAI API

- Once logged in, access the API section by navigating to your account dashboard.
- In the API section, find the option to generate a new API key. Click on the button or link provided to create a new key.



3.7 LangChain

Use `http://134.122.112.73:8000/` address for LangChain URL and `6f05931d-7a4a-4f9f-ab3e-8b87cef6a7de` for LangChain Token

4. Configuring Sender Domain

For email functionalities, navigate to **Admin -> Control Panel -> Email Domain** and enter your domain. Update your DNS records as prompted and verify the domain through CRM.

5. Optional CRM Settings

Navigate to **<https://app.mycrmdomain.com/index.php?m=admin> -> Settings**

The screenshot shows the 'Settings' page in the MyCRM application, specifically the 'General' tab. The breadcrumb trail is 'Control panel > Settings > General'. Below the 'Settings' header, there are tabs for 'Profile: General', 'Mobile device', and 'Tablet device'. A 'Common settings' section is highlighted with a dark header. The settings are organized into a table-like structure with labels on the left and input fields on the right. Each input field has a '[+M] [+T]' icon and a '[?]' help icon. The settings include: Resource title (MyCRM), Resource URL (http://app.mycrmdomain.com/), Site URL for mobile devices (http://), Site URL for tablet devices (http://), a checked checkbox for 'Allow an access from other domains', Automatic redirect URL scheme (No redirection), Site short description/logo text, Copyright text (Copyright © 2024 MyCRM), Keywords (meta-tag "keywords"), Resource description (meta-tag "description"), Language (en), Theme (skin) (vertical), Number of side panels (2), and Default (autoload) module (dashboard). A 'Cookie notice' setting is partially visible at the bottom.

Resource title:	MyCRM	[+M] [+T]	[?]
Resource URL:	http://app.mycrmdomain.com/		[?]
Site URL (for mobile devices):	http://		[?]
Site URL (for tablet devices):	http://		[?]
<input checked="" type="checkbox"/> Allow an access from other domains			[?]
Automatic redirect URL scheme:	No redirection	[+M] [+T]	[?]
Site short description/logo text:		[+M] [+T]	[?]
Copyright text:	Copyright © 2024 MyCRM	[+M] [+T]	[?]
Keywords (meta-tag "keywords"):		[+M] [+T]	[?]
Resource description (meta-tag "description"):		[+M] [+T]	[?]
Language:	en	[+M] [+T]	[?]
Theme (skin):	vertical	[+M] [+T]	[?]
Number of side panels:	2	[+M] [+T]	[?]
Default (autoload) module:	dashboard	[+M] [+T]	[?]
Cookie notice:	07	[+M] [+T]	[?]

Resource title - website title

Copyright text

Administrator's e-mail