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

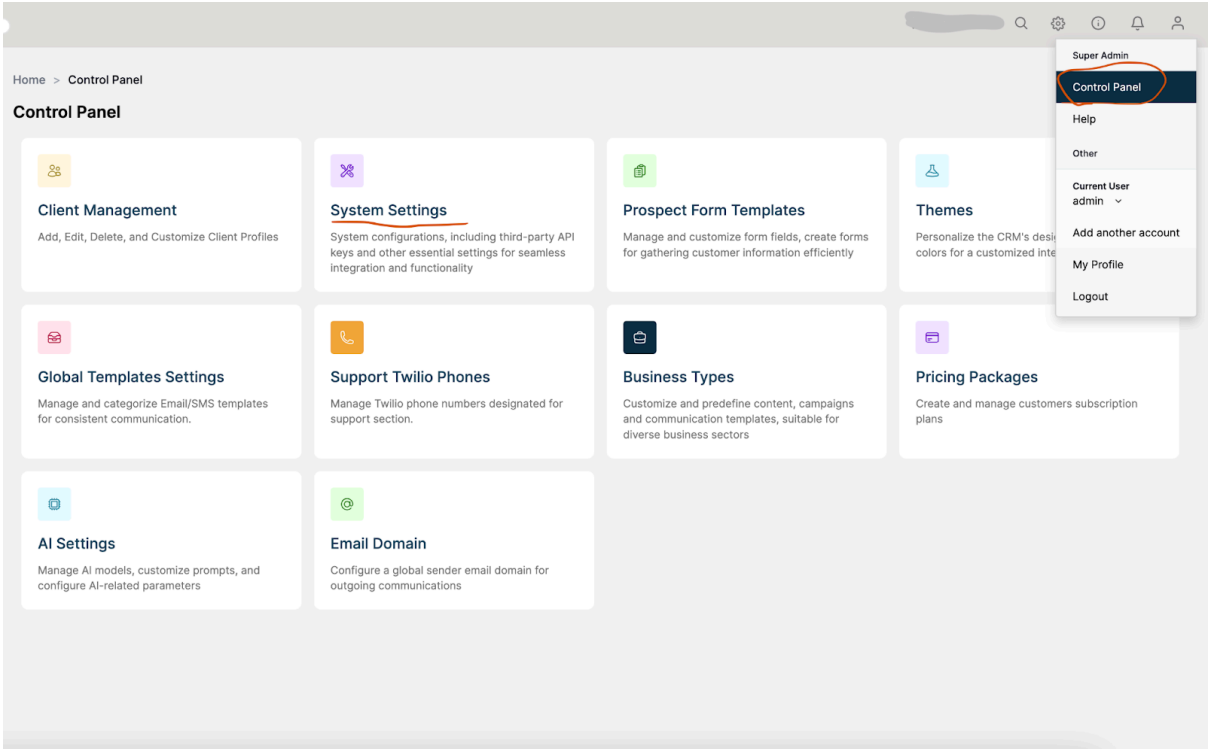
2.2 Cron Task Setup

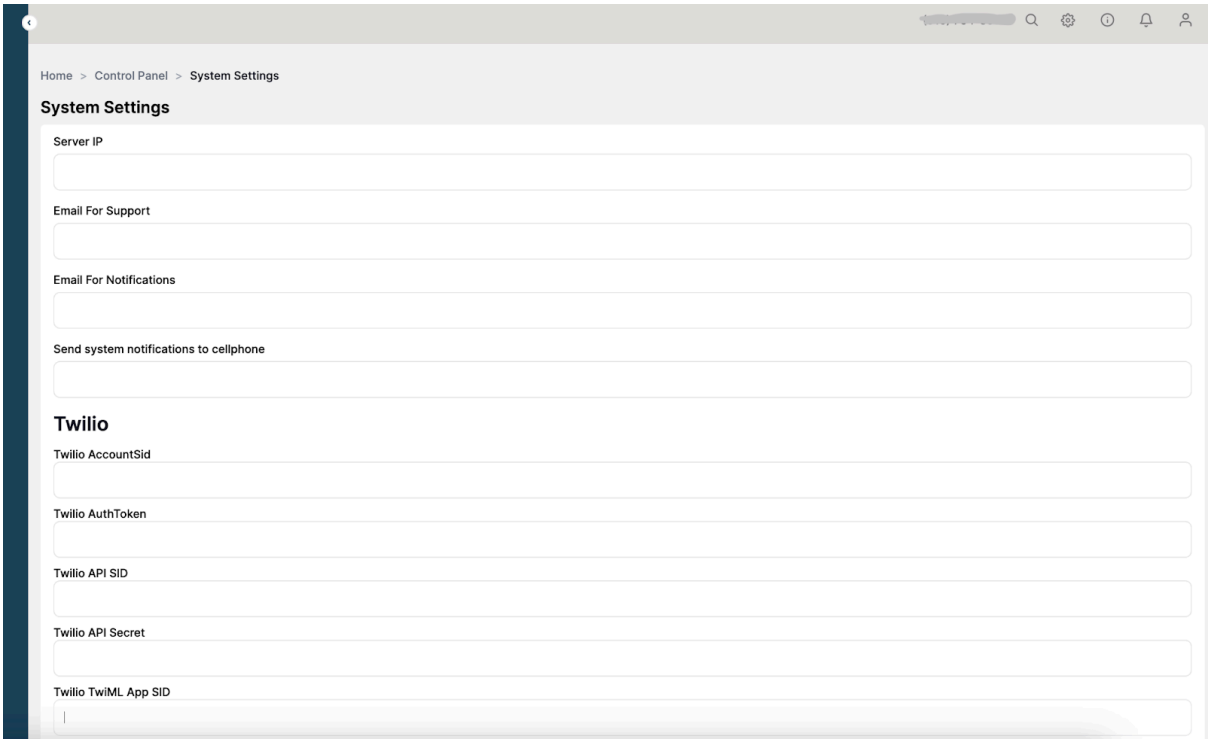
Configure the following cron tasks using the specified syntax. Replace `LINUXUSER` with your server's username and `FULL_PATH` with the full directory path to your CRM installation.

** * * * * 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.



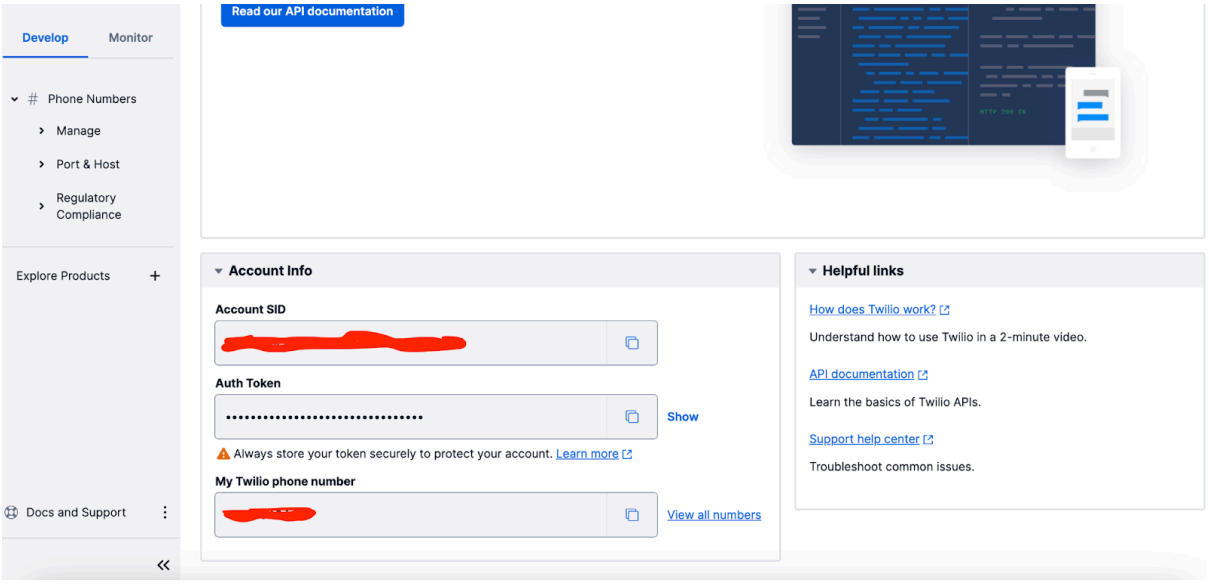


3.1 CRM Settings

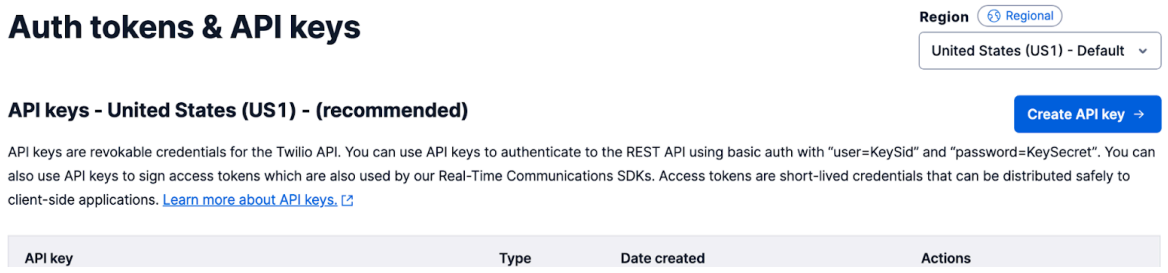
- **Server IP:** Specify the IP address of the server where CRM is hosted. This is crucial for the Knowledgebase section of your CRM.
- **Email For Support:** Enter the email address that will handle support inquiries from users. This ensures that your team can provide timely assistance to users facing 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

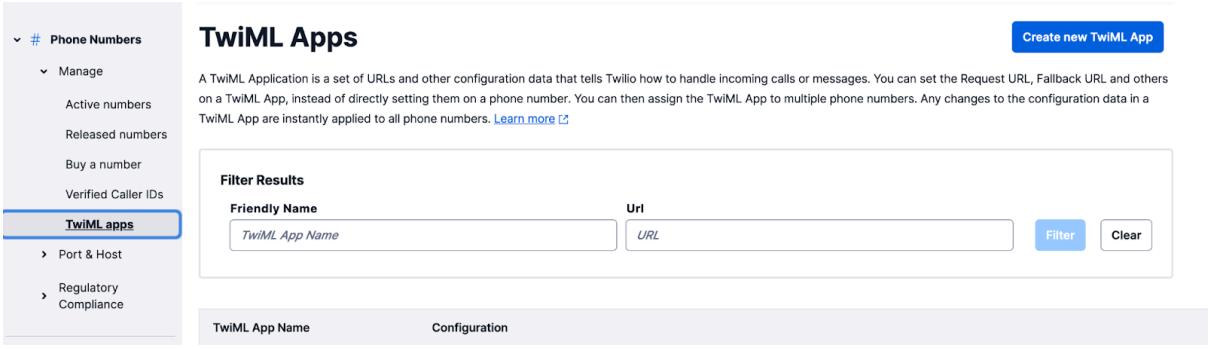
- Obtain your Twilio Account Sid and Auth Token from the Twilio dashboard.

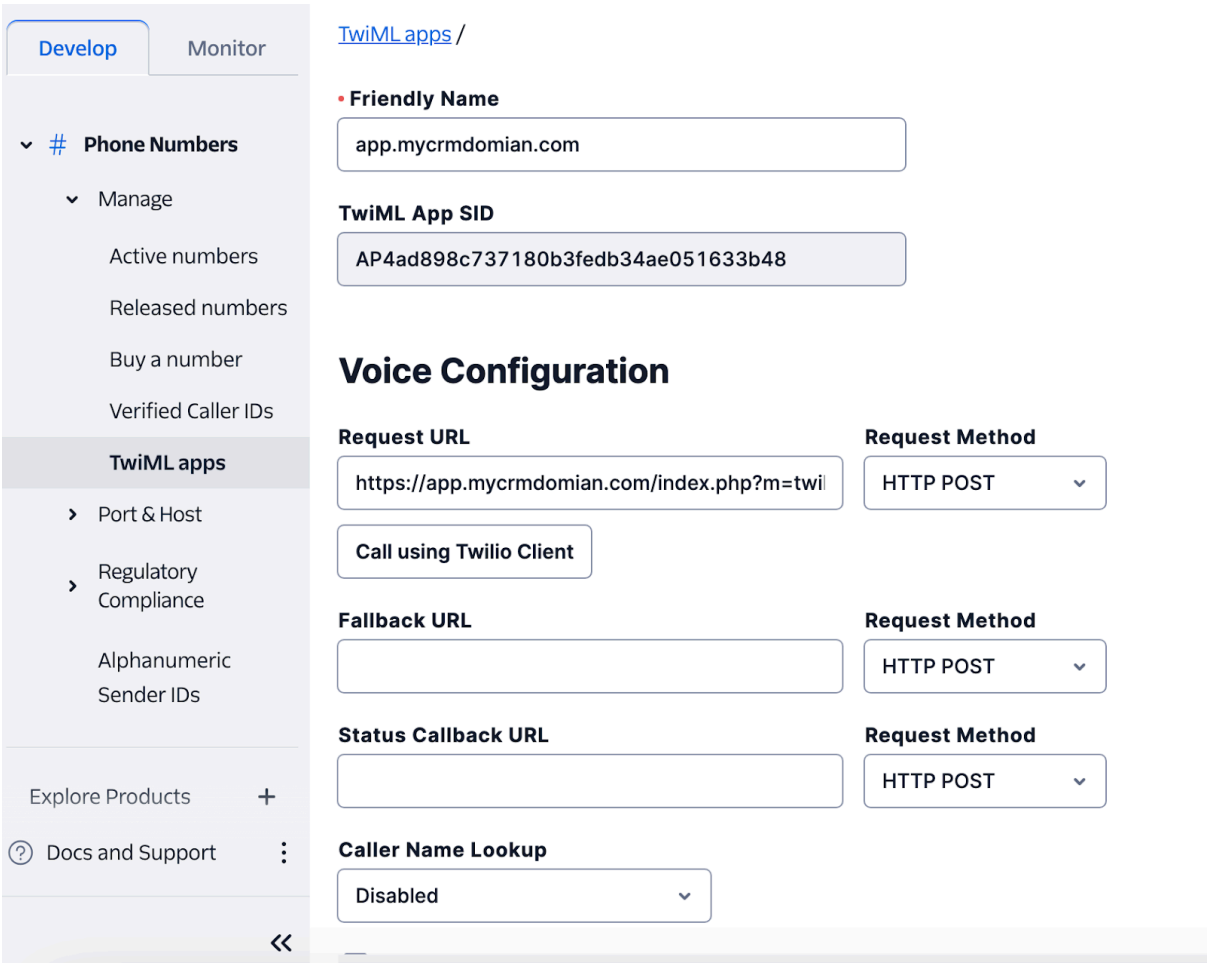


- Navigate to API keys & tokens under your Twilio account to create an API key, noting the SID and secret.



- 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`

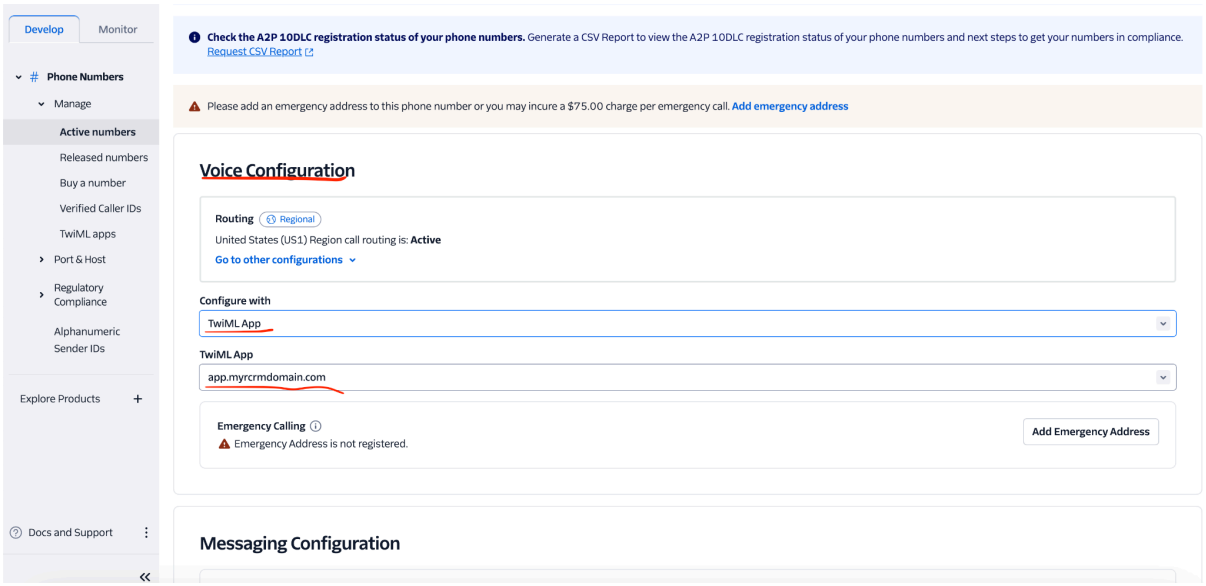




- Buy and configure a new Twilio number, setting it as the `default Twilio Number` and `System Company Twilio Phone` number in CRM System Settings.

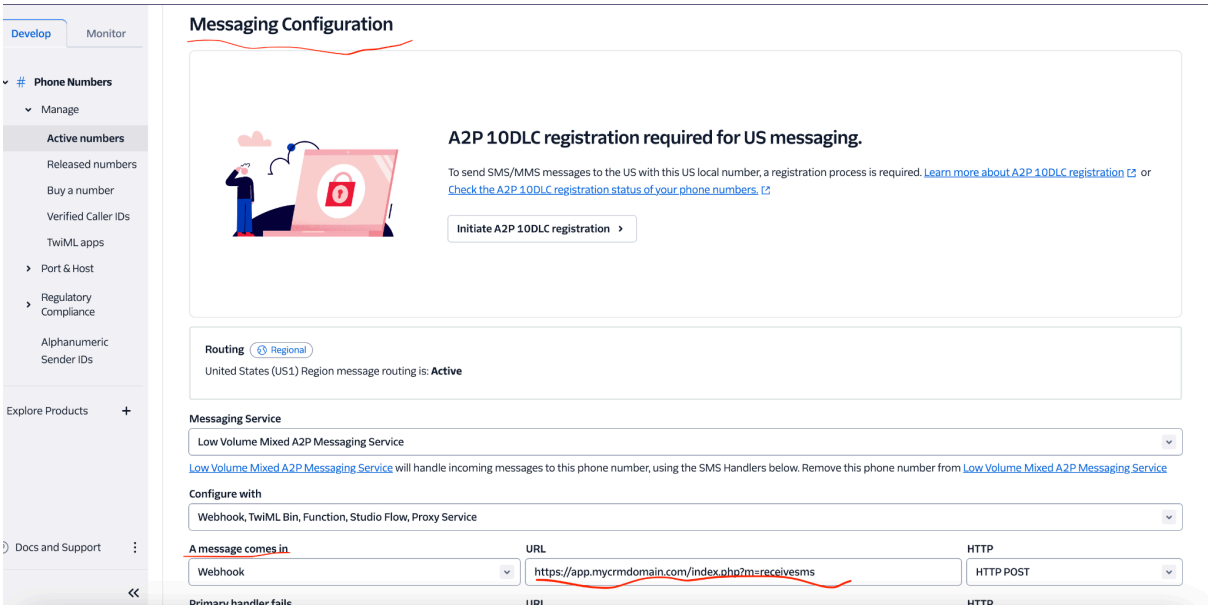
Navigate: `Phone Numbers -> Manage -> Active Number -> Buy a Number`

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



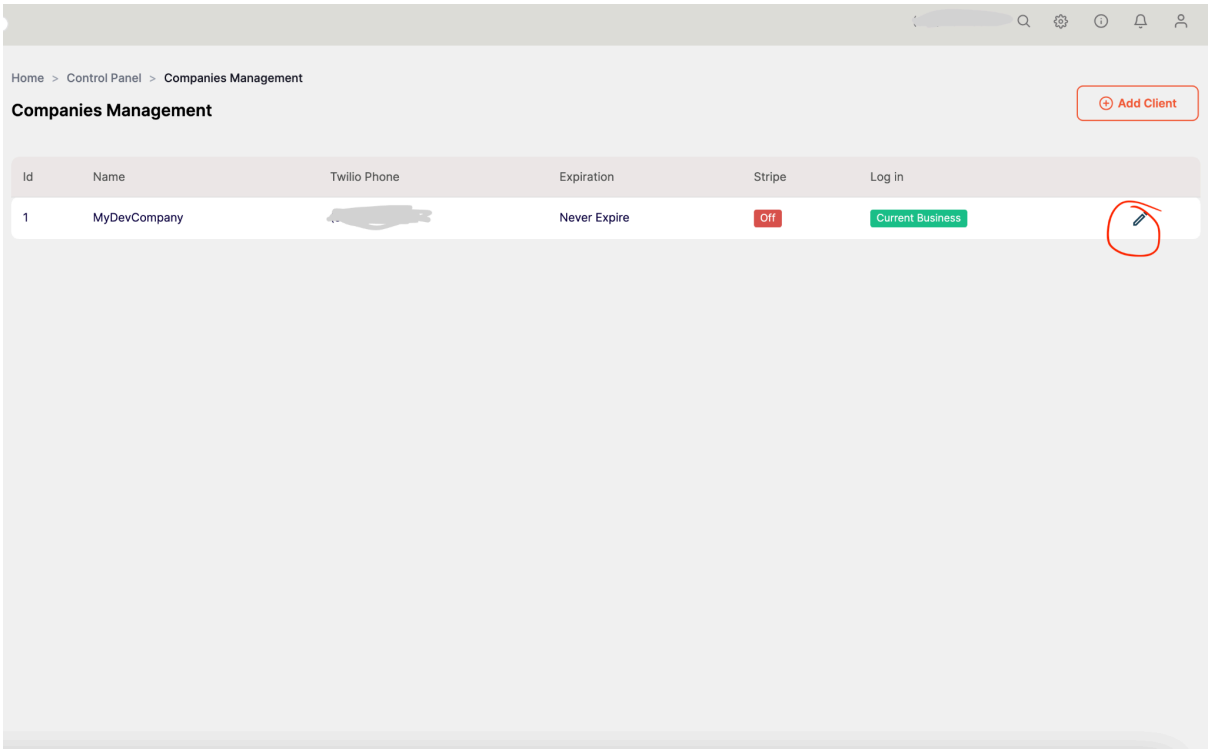
Messaging Section

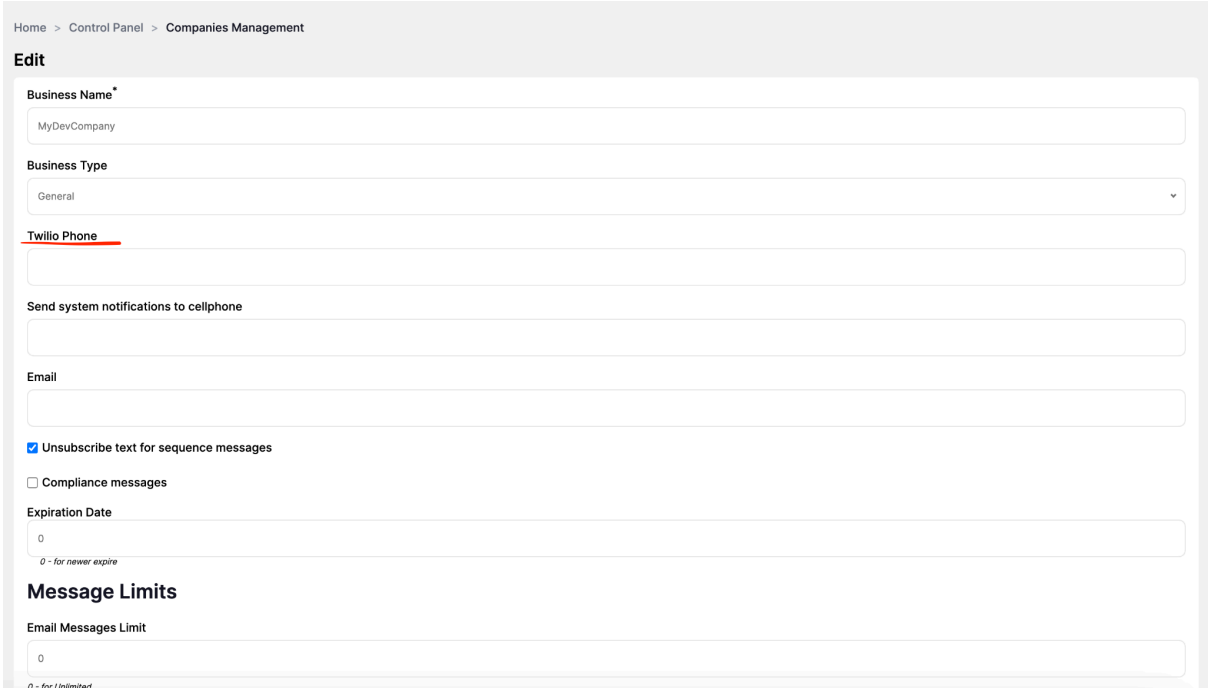
A message Comes In -> webhook = https://app.mycrmdomain.com/index.php?m=receivesms



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`



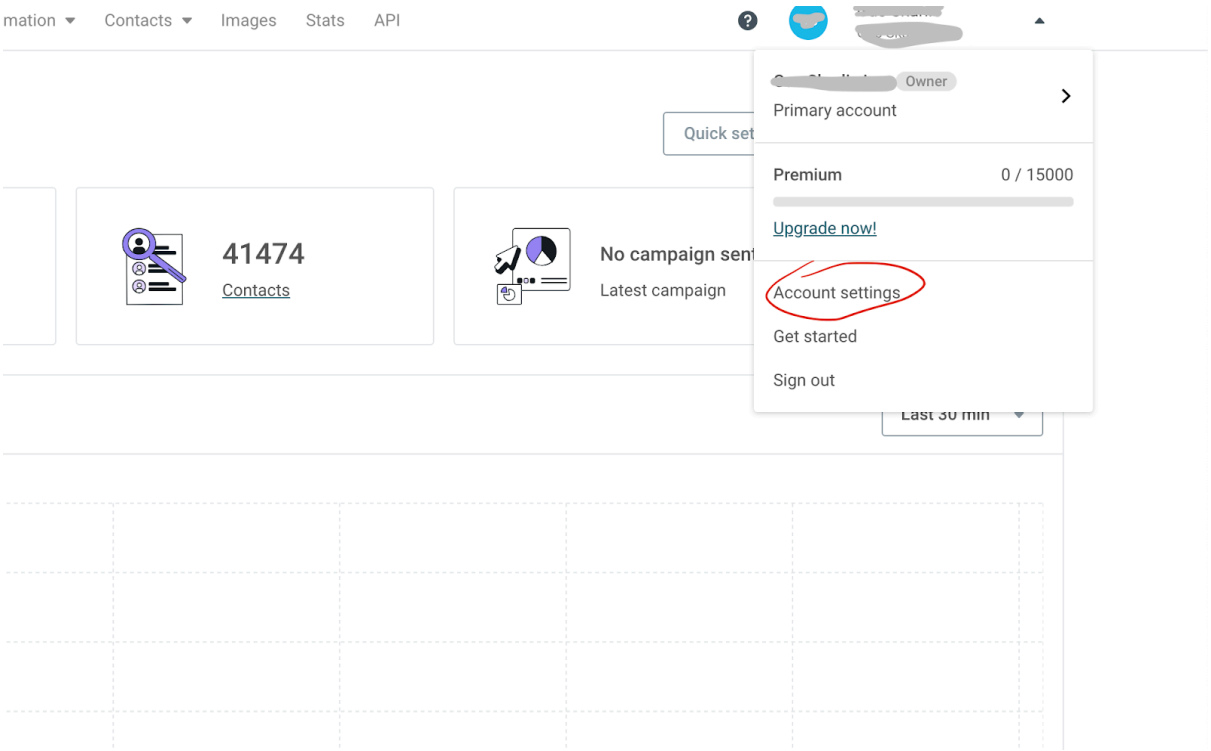


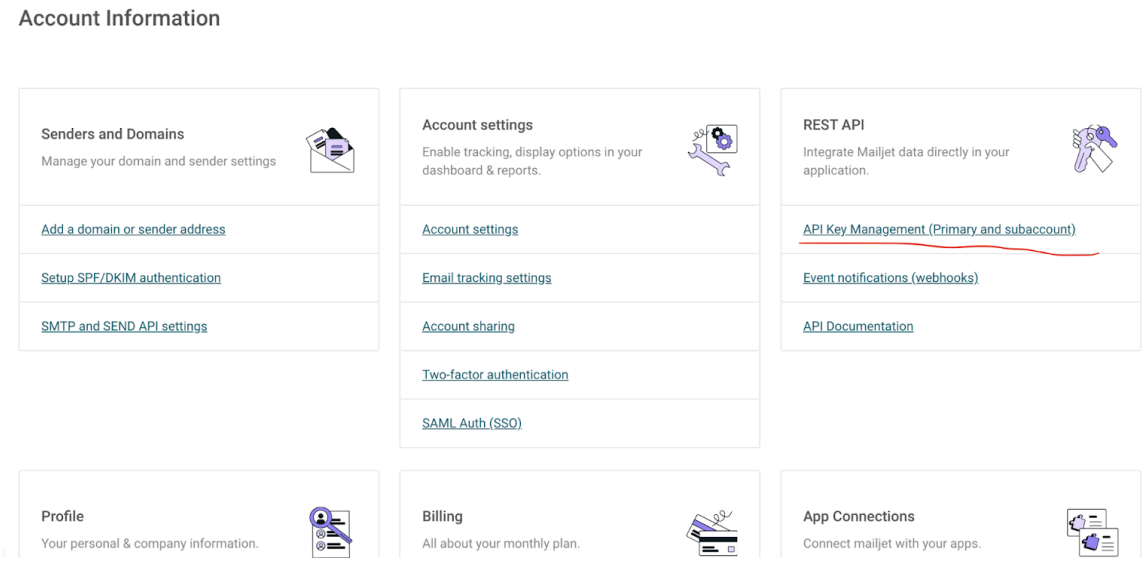
3.2 Integrating Email Services

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.





- 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 regulars 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	Endpoint URL*		
Open	https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus&type=open	Group events	Send a test

Apply url to all events

Event	Endpoint URL*		
Sent	https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus&type=sent	Group events	Send a test

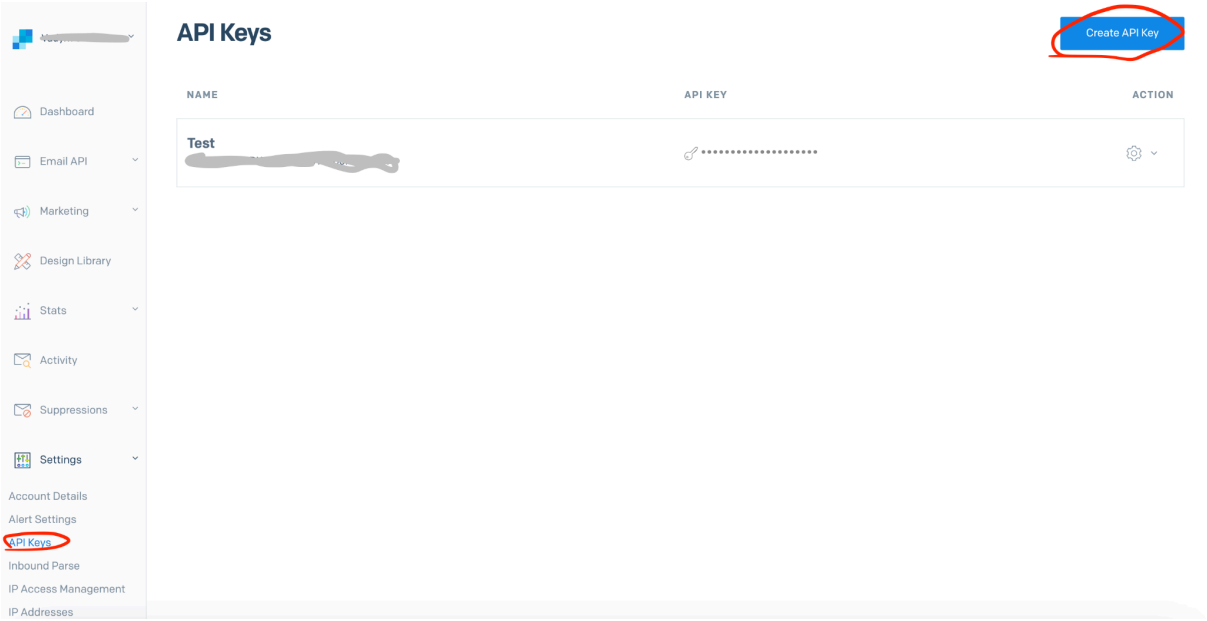
We highly discourage tracking "Sent" events due to the amount of events it can trigger. Please select it only if required.

Event	Endpoint URL*		
Click	https://app.mycrmdomain.com/index.php?m=emailstats&d=getstatus&type=click	Group events	Send a test

Event	Endpoint URL*

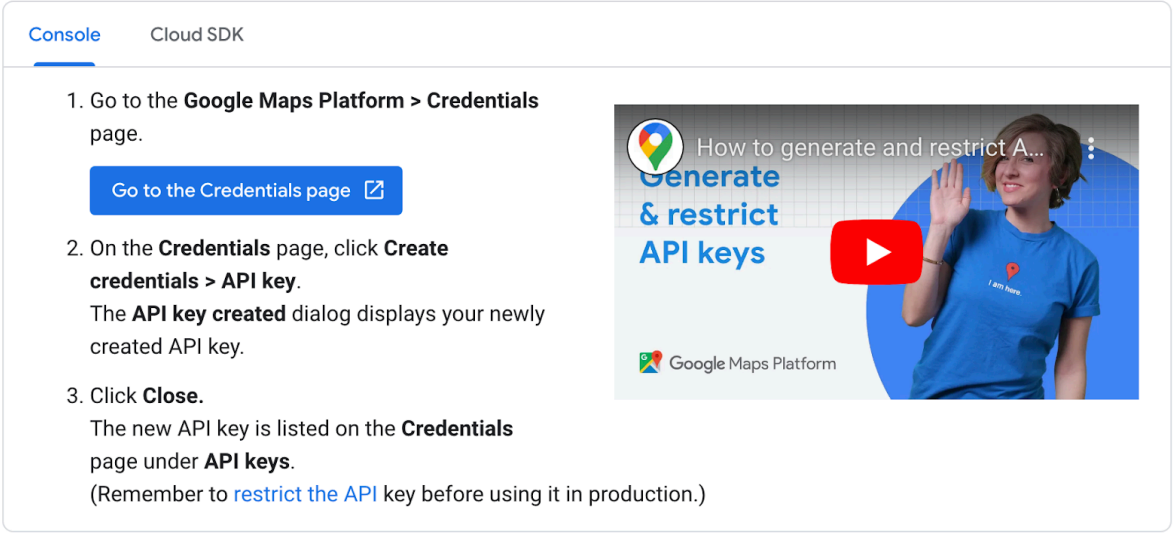
SendGrid

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



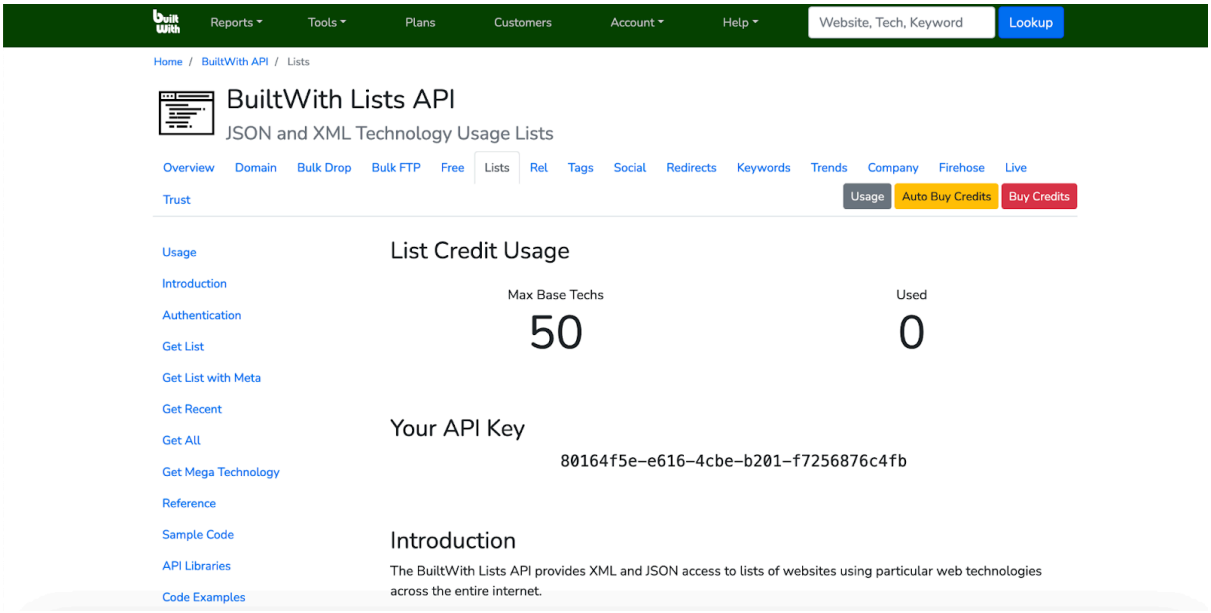
3.3. Google Places

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



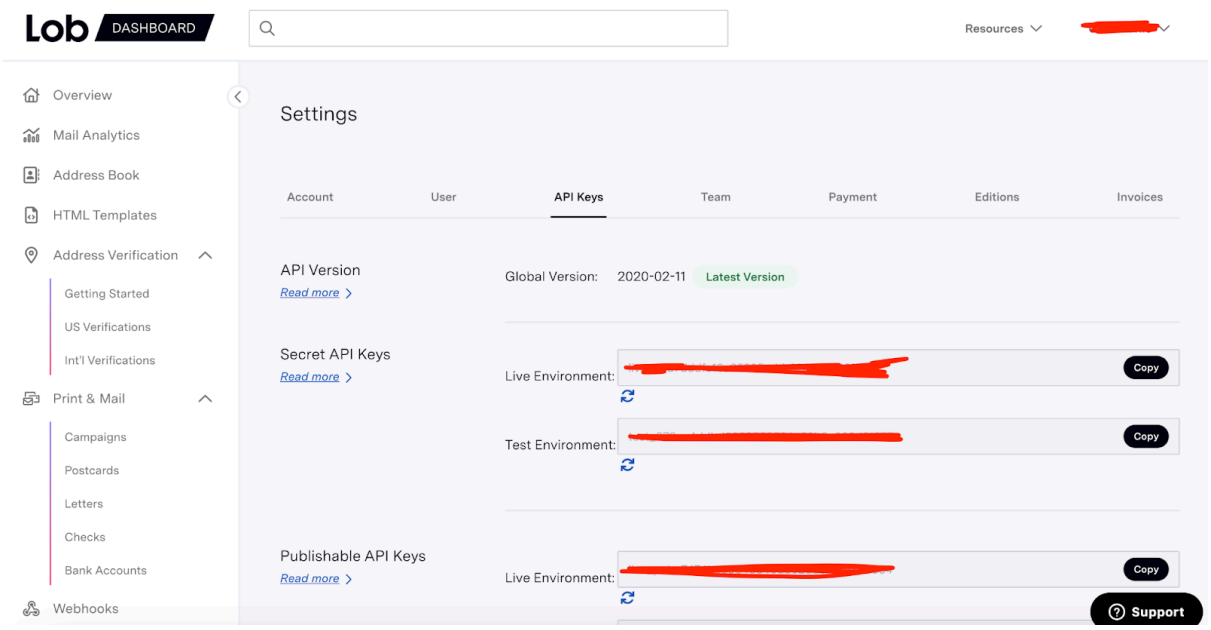
3.4. BuiltWith API

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



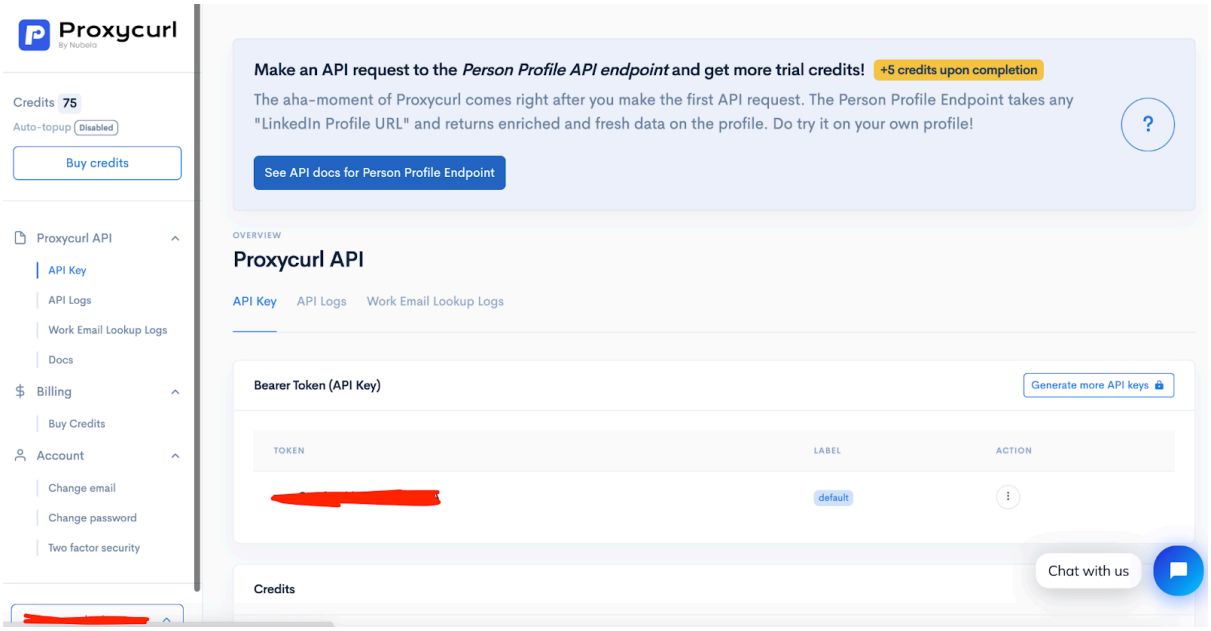
3.5. Lob API

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



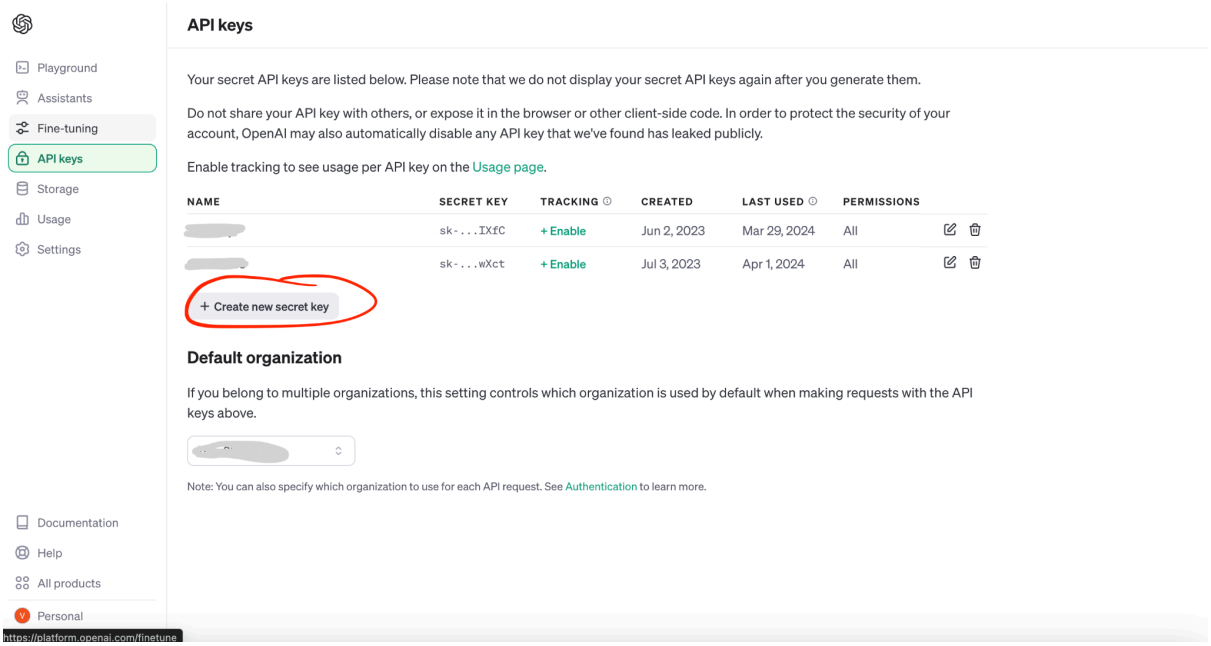
3.6 ProxyCurl API

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

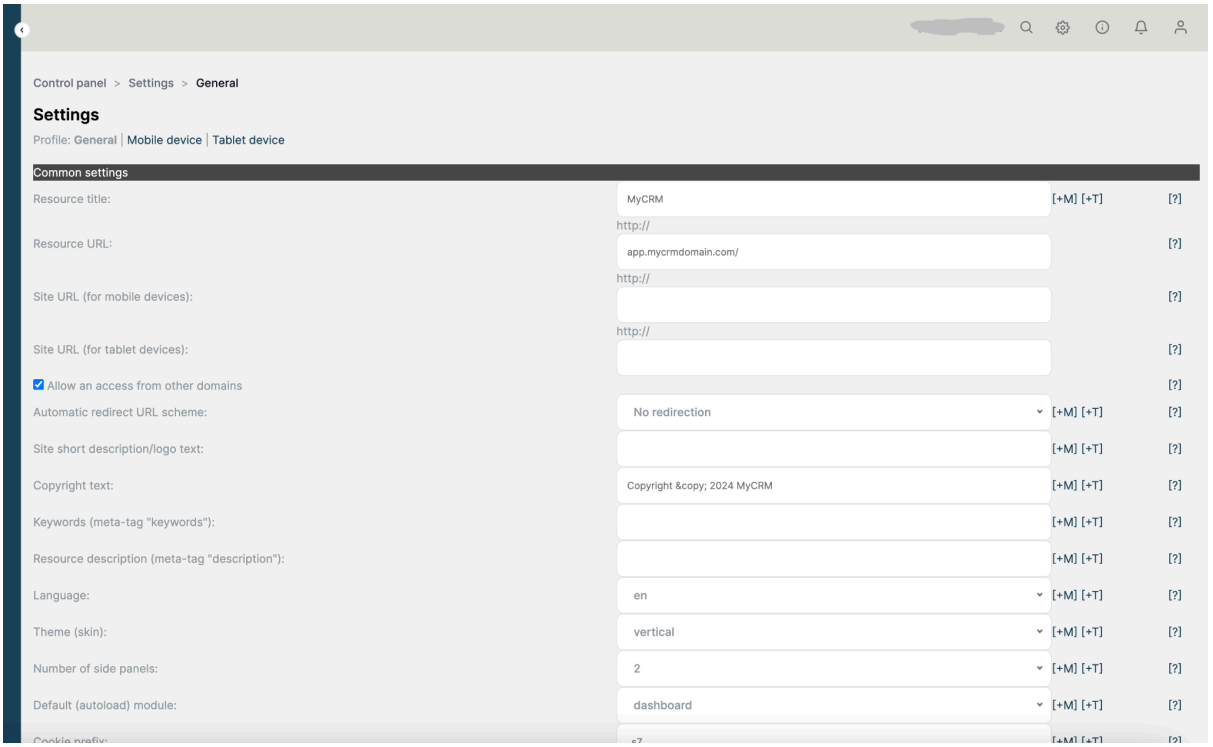
Use `http://134.122.112.73:8000/` address for `LangChain URL` and `6f05931d-7a4a-4f9f-ab3e-8b87cef6a7de` for `LangChain Token`

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`



Resource title - website title
Copyright text
Administrator's e-mail