

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 `htdocs/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

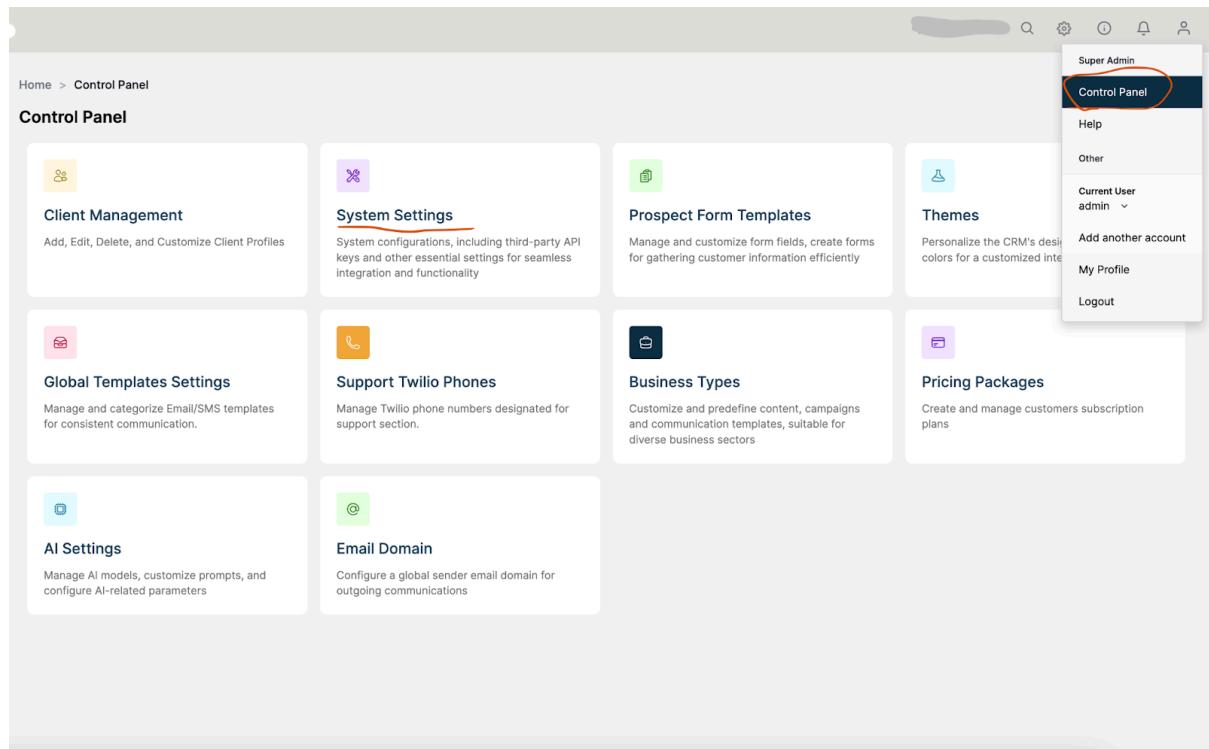
2.2 Cron Task Setup

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=cronphoneneverifier
* * * * * 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=leadphonerevalidator
* * * * * 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=cronleadphoneneverifier
* * * * * LINUXUSER /usr/bin/php /var/www/vhosts/FULL_PATH/httpdocs/cli.php --m=cronbuiltwithphoneneverifier
* * * * * 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=cronpromptqueue
* * * * * 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
```

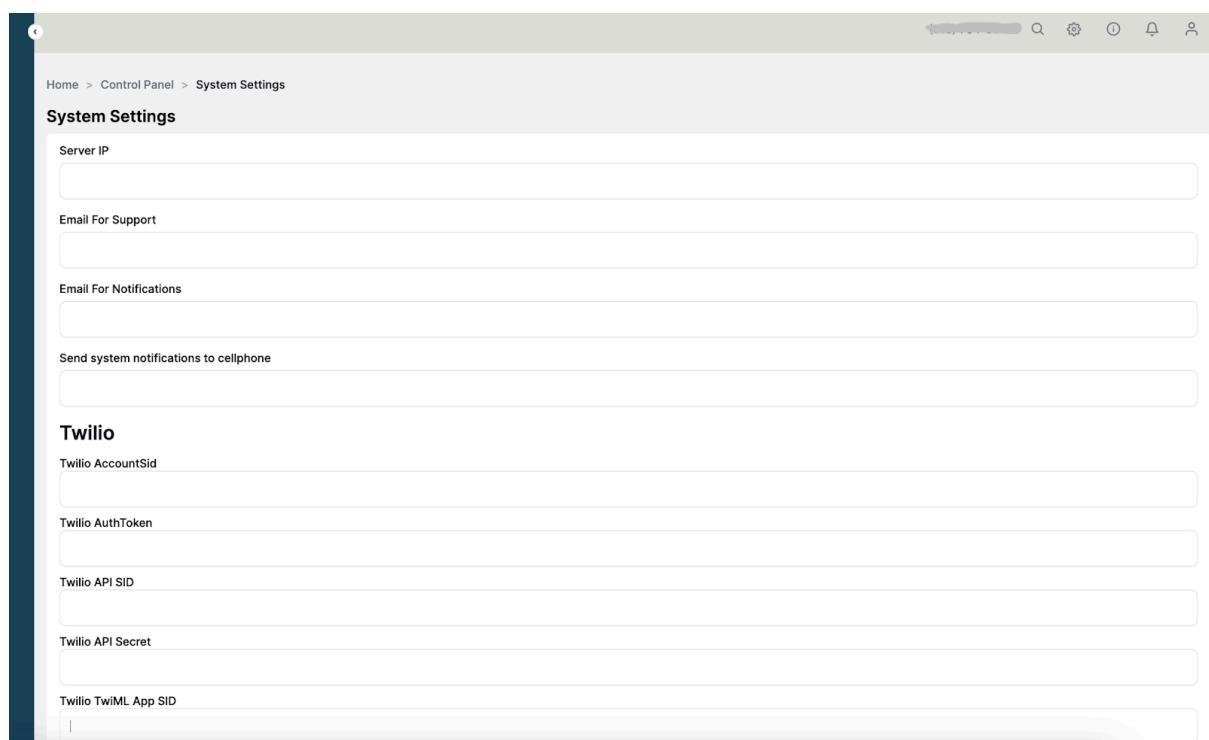
3. System Settings

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.



The screenshot shows the Control Panel interface. In the top right corner, a user menu is open, showing the 'Control Panel' option, which is circled in red. The main content area displays various system settings modules:

- Client Management**: Add, Edit, Delete, and Customize Client Profiles.
- System Settings**: (Underlined in red) System configurations, including third-party API keys and other essential settings for seamless integration and functionality.
- Prospect Form Templates**: Manage and customize form fields, create forms for gathering customer information efficiently.
- Themes**: Personalize the CRM's design colors for a customized interface.
- Global Templates Settings**: Manage and categorize Email/SMS templates for consistent communication.
- Support Twilio Phones**: Manage Twilio phone numbers designated for support section.
- Business Types**: Customize and predefine content, campaigns and communication templates, suitable for diverse business sectors.
- Pricing Packages**: Create and manage customers subscription plans.
- AI Settings**: Manage AI models, customize prompts, and configure AI-related parameters.
- Email Domain**: Configure a global sender email domain for outgoing communications.



The screenshot shows the 'System Settings' page. The top navigation bar shows the path: Home > Control Panel > System Settings.

System Settings

- Server IP**: Input field for the server IP address.
- Email For Support**: Input field for the email address for support.
- Email For Notifications**: Input field for the email address for notifications.
- Send system notifications to cellphone**: Input field for sending notifications to a cellphone.

Twilio

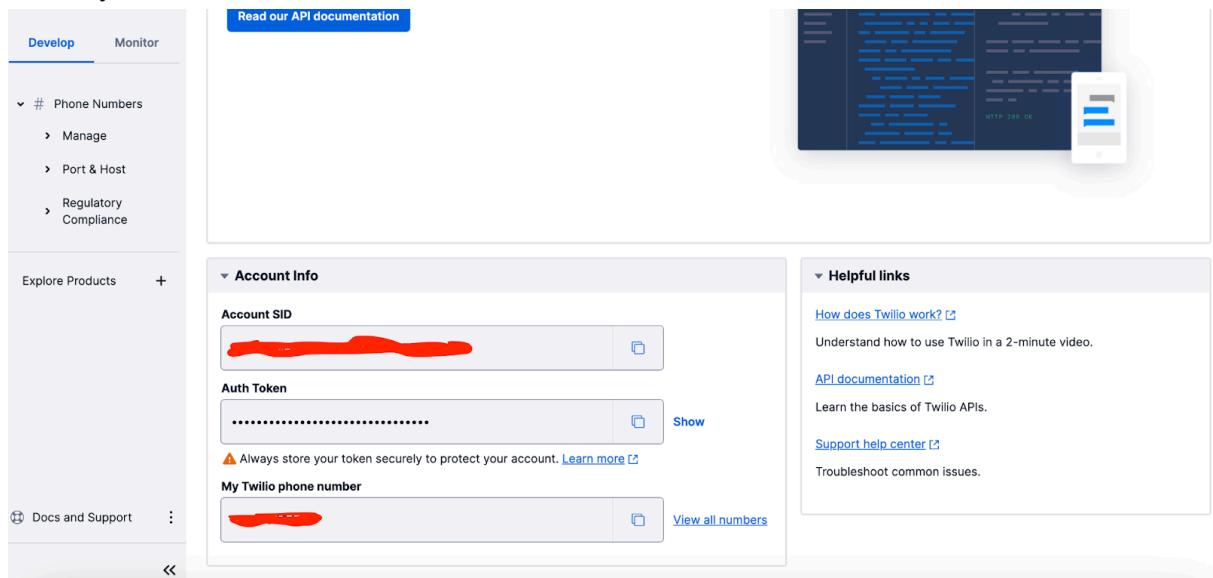
- Twilio AccountSid**: Input field for the Twilio Account SID.
- Twilio AuthToken**: Input field for the Twilio Auth Token.
- Twilio API SID**: Input field for the Twilio API SID.
- Twilio API Secret**: Input field for the Twilio API Secret.
- Twilio TwiML App SID**: Input field for the Twilio TwiML App SID.

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.



The screenshot shows the Twilio dashboard with the 'Develop' tab selected. On the left, there's a sidebar with 'Phone Numbers' and 'Regulatory Compliance' sections. The main area shows 'Account Info' with fields for 'Account SID' (redacted) and 'Auth Token' (redacted). A warning message says 'Always store your token securely to protect your account.' Below that is a field for 'My Twilio phone number' (redacted) with a 'View all numbers' link. On the right, there's a 'Helpful links' sidebar with links to 'How does Twilio work?', 'API documentation', and 'Support help center'.

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

Auth tokens & API keys

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

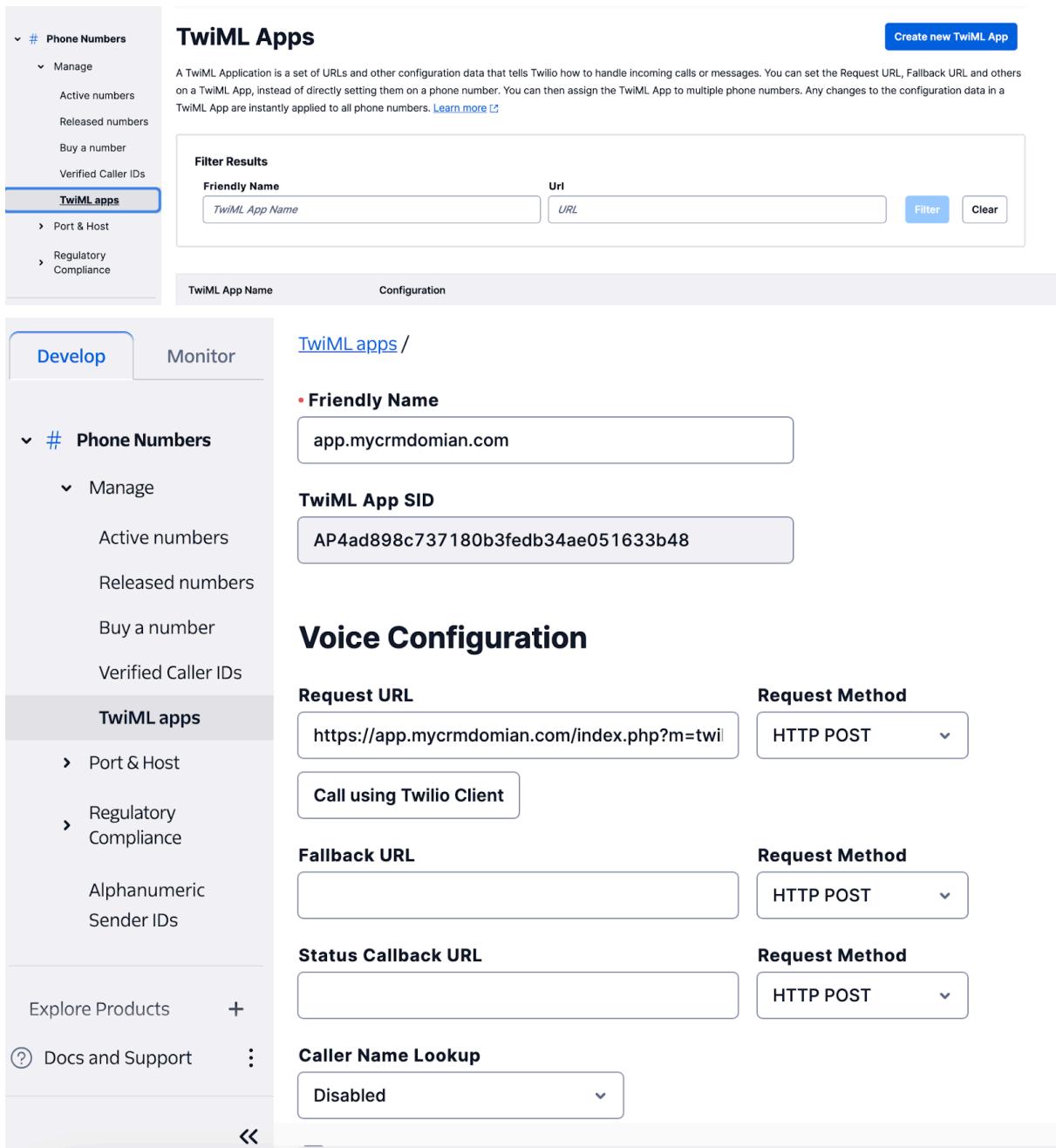
Region Regional
United States (US1) - Default

[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
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- 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**

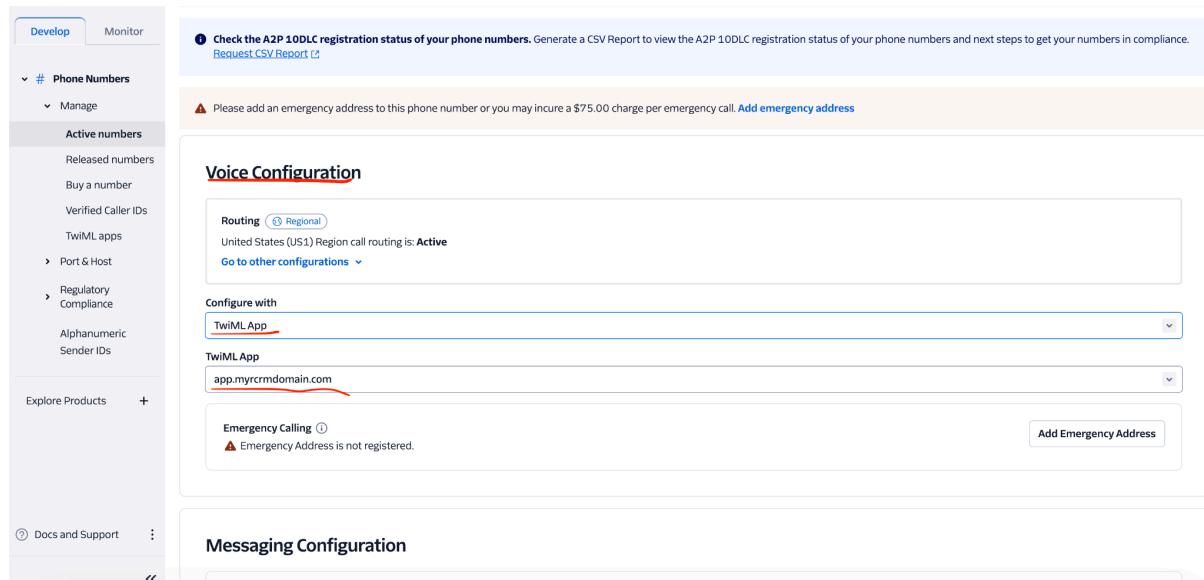


The image shows two screenshots of the Twilio web interface. The top screenshot is the 'TwiML Apps' configuration page. It features a sidebar with 'Phone Numbers' (Manage, Active numbers, Released numbers, Buy a number, Verified Caller IDs, TwiML apps, Port & Host, Regulatory Compliance). The main area has a 'Create new TwiML App' button and a 'Filter Results' section with 'Friendly Name' and 'Url' fields. The bottom screenshot is the 'Voice Configuration' page. It has a sidebar with 'Phone Numbers' (Manage, Active numbers, Released numbers, Buy a number, Verified Caller IDs, TwiML apps, Port & Host, Regulatory Compliance, Alphanumeric Sender IDs). The main area contains fields for 'Request URL' (https://app.mycrmdomain.com/index.php?m=twilioclientvoice), 'Request Method' (HTTP POST), 'Fallback URL' (empty), 'Request Method' (HTTP POST), 'Status Callback URL' (empty), 'Request Method' (HTTP POST), and 'Caller Name Lookup' (Disabled). A 'Develop' tab is selected in the top screenshot.

- 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**

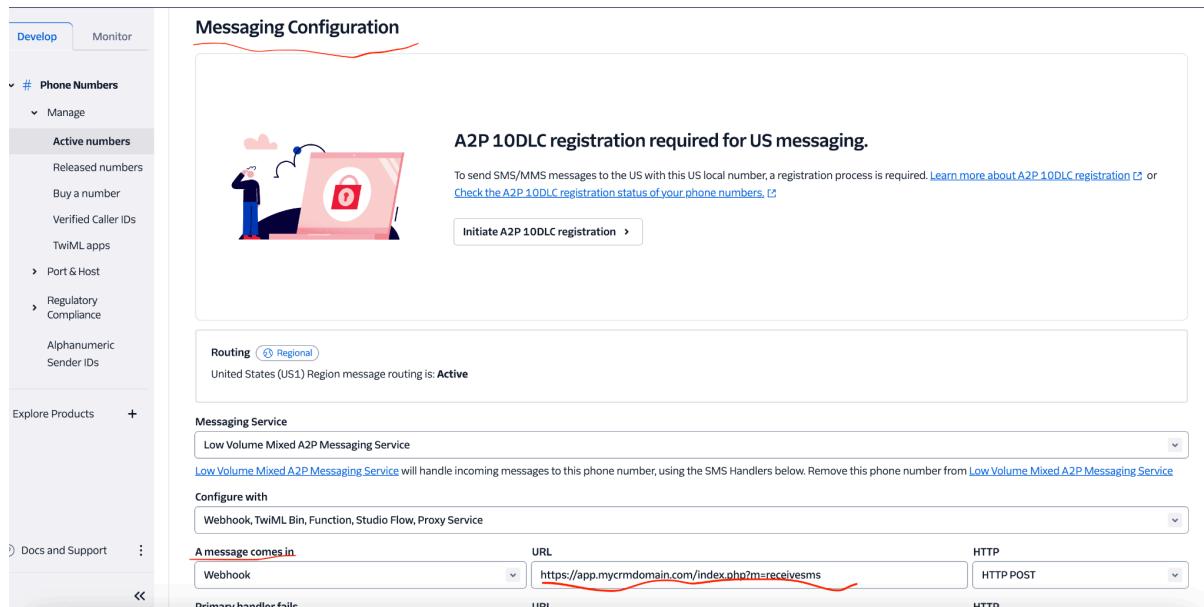
Voice and Fax section -> Select Configure With TwiML App -> Select created Twiml app



The screenshot shows the Twilio console under the 'Develop' tab. On the left, a sidebar for 'Phone Numbers' is open, showing 'Active numbers' and a 'TwiML apps' section. The main area is titled 'Voice Configuration'. It includes a 'Routing' section (Regional, United States (US1) Region, call routing is: Active), a 'Configure with' dropdown set to 'TwiML App', and a URL input field containing 'app.myCRMdomain.com'. A warning message at the bottom states: 'Emergency Calling ⓘ' and 'Emergency Address is not registered.' with a 'Add Emergency Address' button.

Messaging Section

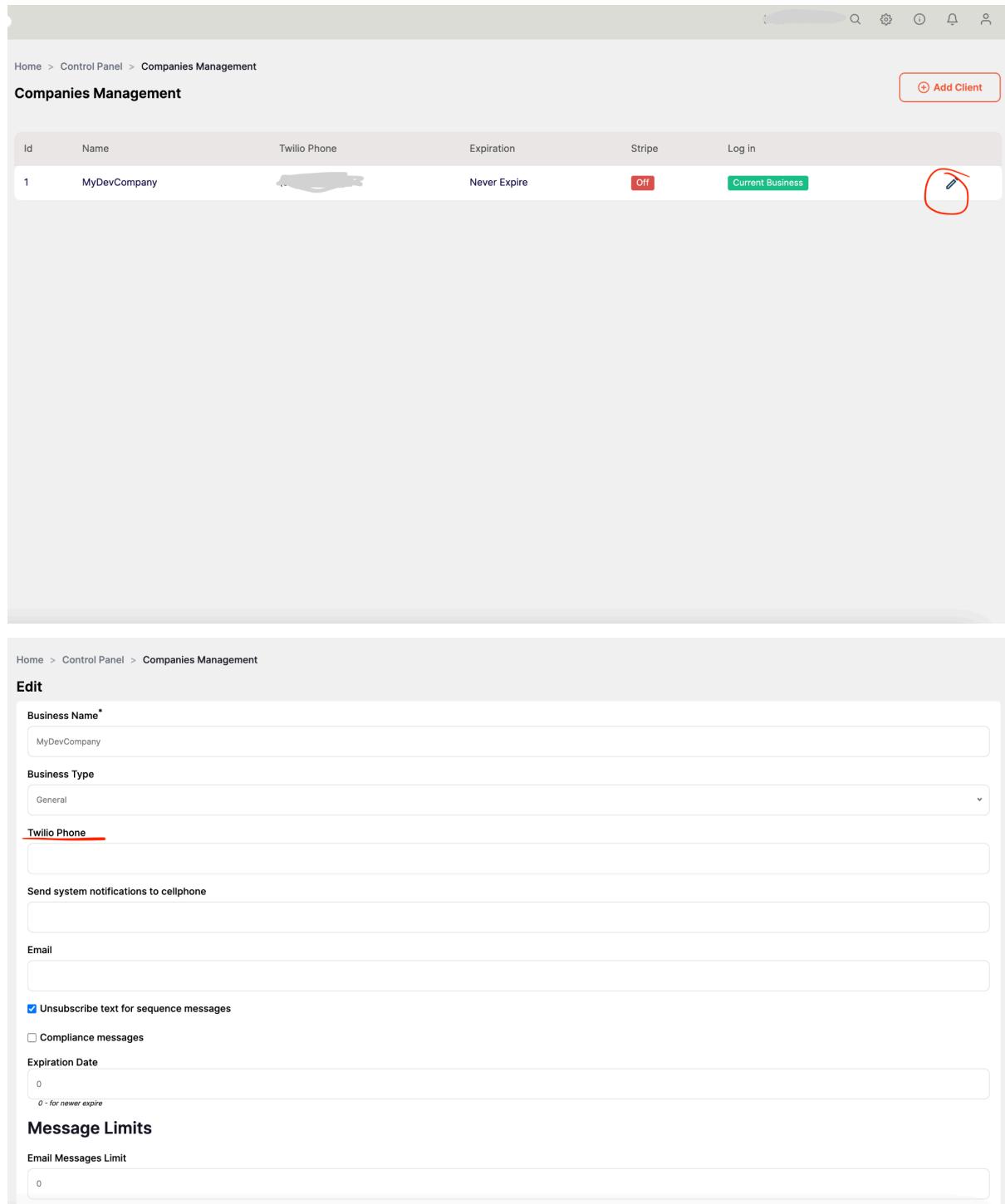
A message Comes In -> webhook =
<https://app.myCRMdomain.com/index.php?m=receivesms>



The screenshot shows the Twilio console under the 'Develop' tab. On the left, a sidebar for 'Phone Numbers' is open, showing 'Active numbers' and a 'TwiML apps' section. The main area is titled 'Messaging Configuration'. It includes a 'Routing' section (Regional, United States (US1) Region, message routing is: Active), a 'Messaging Service' dropdown set to 'Low Volume Mixed A2P Messaging Service', and a 'Configure with' dropdown set to 'Webhook'. A 'Message comes in' section is configured with a 'Webhook' URL: 'https://app.myCRMdomain.com/index.php?m=receivesms' and '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



The image shows two screenshots of a software interface for managing companies. The top screenshot is a list of companies, and the bottom one is a detailed edit form for a specific company.

Companies Management List:

- Header: Home > Control Panel > Companies Management
- Buttons: Add Client (red button)
- Table Headers: Id, Name, Twilio Phone, Expiration, Stripe, Log in
- Table Data: 1, MyDevCompany, [REDACTED], Never Expire, Off, Current Business, [Edit icon circled in red]

Edit Company #1 Form:

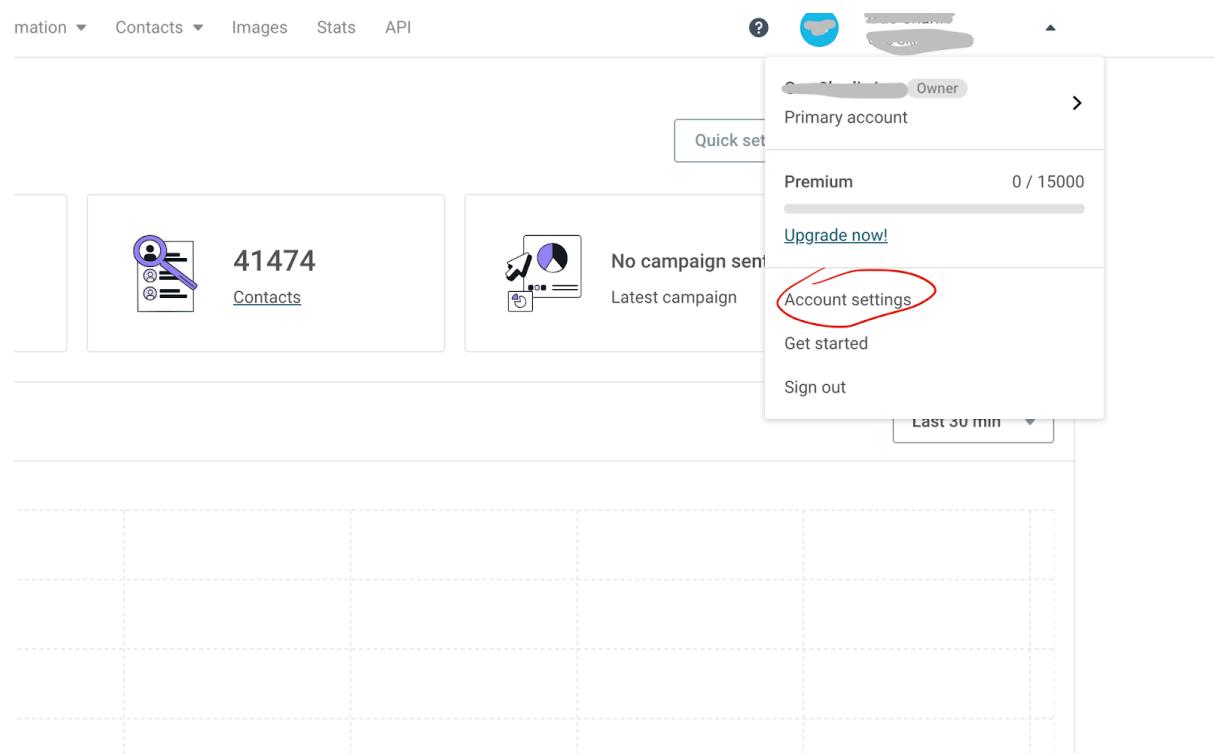
- Header: Home > Control Panel > Companies Management
- Section: Edit
- Fields:
 - Business Name*: MyDevCompany
 - Business Type: General
 - Twilio Phone: [REDACTED]
 - Send system notifications to cellphone: [REDACTED]
 - Email: [REDACTED]
 - Unsubscribe text for sequence messages
 - Compliance messages
- Expiration Date: 0 (0 - for never expire)
- Section: Message Limits
- Fields: Email Messages Limit: 0 (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.



The screenshot shows the Mailjet dashboard interface. At the top, there is a navigation bar with links for 'mation', 'Contacts', 'Images', 'Stats', and 'API'. On the right side, there is a user profile icon and a dropdown menu. The dropdown menu is open, showing the following options: 'Primary account' (highlighted with a red oval), 'Premium' (with a progress bar showing 0 / 15000), 'Upgrade now!', 'Account settings' (highlighted with a red oval), 'Get started', and 'Sign out'. Below the dashboard, there is a large, empty grid table with several columns and rows.

Account Information

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

- 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	Endpoint URL*
Open	<input type="text" value="https://app.myCRMdomain.com/index.php?m=emailstats&d=getstatus&type=open"/>
<input checked="" type="checkbox"/> Group events ? Send a test ? Delete	
Apply url to all events	

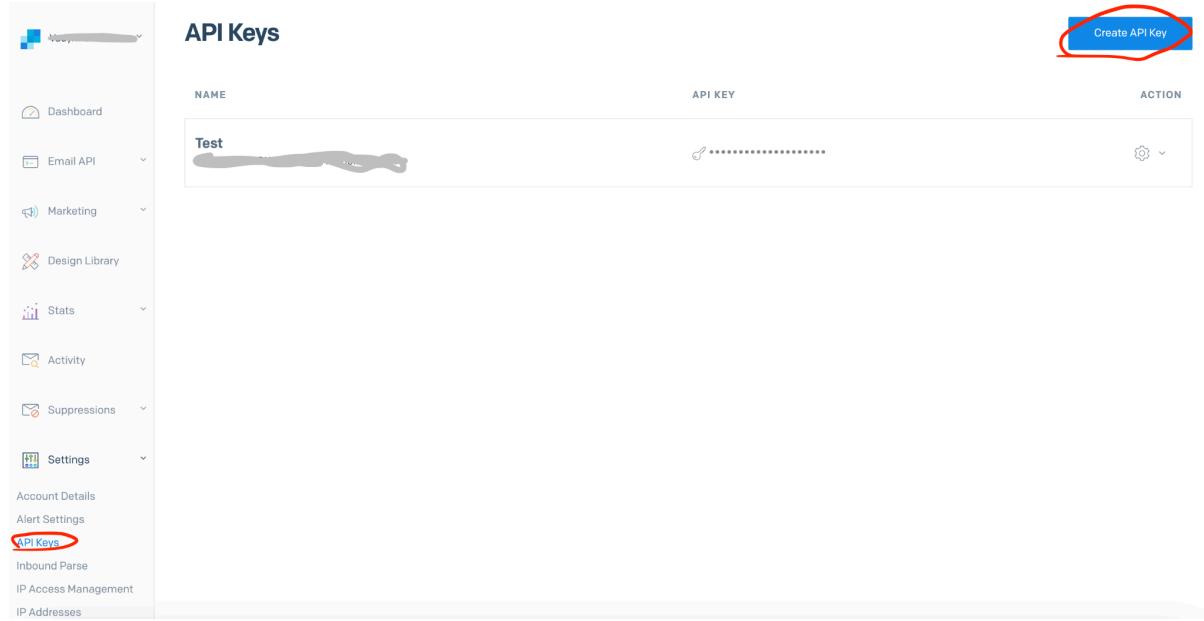
Event	Endpoint URL*
Sent	<input type="text" value="https://app.myCRMdomain.com/index.php?m=emailstats&d=getstatus&type=sent"/>
We highly discourage tracking "Sent" events due to the amount of events it can trigger. Please select it only if required.	
<input checked="" type="checkbox"/> Group events ? Send a test ? Delete	

Event	Endpoint URL*
Click	<input type="text" value="https://app.myCRMdomain.com/index.php?m=emailstats&d=getstatus&type=click"/>
<input checked="" type="checkbox"/> Group events ? Send a test ? Delete	

Event	Endpoint URL*
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SendGrid

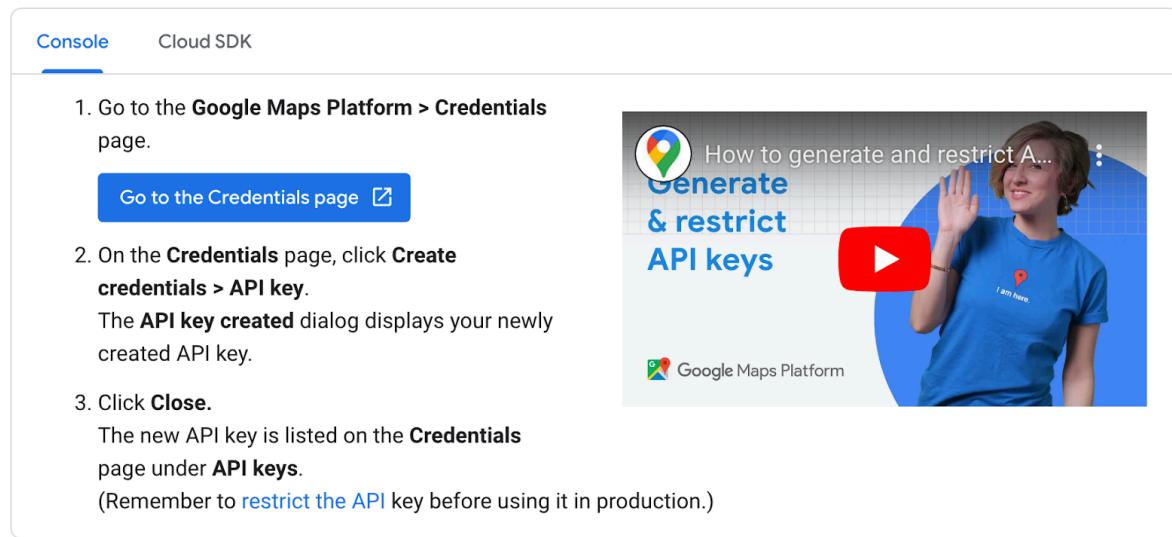
API Key: Generate a SendGrid API key from your SendGrid dashboard. This key authorizes PushbuttonCRM to send emails through your SendGrid account.



The screenshot shows the SendGrid API Keys dashboard. On the left, a sidebar lists various account sections: Dashboard, Email API, Marketing, Design Library, Stats, Activity, Suppressions, Settings, Account Details, Alert Settings, API Keys (which is highlighted with a red box), Inbound Parse, IP Access Management, and IP Addresses. The main content area is titled 'API Keys' and shows a table with one row. The table has columns for 'NAME', 'API KEY', and 'ACTION'. The 'NAME' column contains 'Test' with a redacted value. The 'API KEY' column contains a redacted value starting with 'sk_'. The 'ACTION' column contains a gear icon and a dropdown arrow. A blue button at the top right of the table area is labeled 'Create API Key' and is also circled in red.

3.3. Google Places

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



The screenshot shows a guide for generating an API key in the Google Maps Platform. It starts with a 'Console' tab and a 'Cloud SDK' tab. The guide consists of three numbered steps:

1. Go to the **Google Maps Platform > Credentials** page.
[Go to the Credentials page](#)
2. On the **Credentials** page, click **Create credentials > API key**.
The **API key created** dialog displays your newly created API key.
3. 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.)

On the right, there is a video thumbnail titled 'How to generate and restrict API keys' featuring a woman in a blue shirt with a 'I am here' logo. The video player has a play button and a 'Google Maps Platform' logo at the bottom.

3.4. BuiltWith API

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

The screenshot shows the BuiltWith Lists API dashboard. At the top, there are navigation links for Reports, Tools, Plans, Customers, Account, Help, and a search bar with the placeholder 'Website, Tech, Keyword' and a 'Lookup' button. Below the search bar is a breadcrumb trail: Home / BuiltWith API / Lists. The main content area has a title 'BuiltWith Lists API' with a sub-section 'JSON and XML Technology Usage Lists'. A navigation bar below the title includes links for Overview, Domain, Bulk Drop, Bulk FTP, Free, Lists (which is selected), Rel, Tags, Social, Redirects, Keywords, Trends, Company, Firehose, and Live. A 'Trust' link is also present. On the right side of the navigation bar are buttons for 'Usage', 'Auto Buy Credits', and 'Buy Credits'. The main content area is divided into sections: 'Usage' (with a 'List Credit Usage' sub-section showing 'Max Base Techs' as 50 and 'Used' as 0), 'Introduction' (with a 'Your API Key' sub-section showing the key '80164f5e-e616-4cbe-b201-f7256876c4fb'), 'Authentication' (with links for Get List, Get List with Meta, Get Recent, Get All, and Get Mega Technology), 'Reference' (with links for Sample Code, API Libraries, and Code Examples), and 'Introduction' (with a sub-section explaining 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 API settings page. The left sidebar includes links for Overview, Mail Analytics, Address Book, HTML Templates, Address Verification (with sub-links for Getting Started, US Verifications, and Int'l Verifications), Print & Mail (with sub-links for Campaigns, Postcards, Letters, Checks, and Bank Accounts), and Webhooks. The main content area is titled 'Settings' and has a tab navigation bar with Account, User, API Keys (which is selected), Team, Payment, Editions, and Invoices. Under the 'API Keys' tab, there are sections for 'API Version' (Global Version: 2020-02-11, Latest Version), 'Secret API Keys' (Live Environment and Test Environment fields with copy buttons), and 'Publishable API Keys' (Live Environment field with a copy button). A 'Support' button is located at the bottom right of the main content area.

3.6 ProxyCurl API

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

Proxycurl API

API Key

API Logs

Work Email Lookup Logs

Docs

Billing

Buy Credits

Account

Change email

Change password

Two factor security

OVERVIEW

Proxycurl API

API Key API Logs Work Email Lookup Logs

Bearer Token (API Key)

Generate more API keys

TOKEN LABEL ACTION

default

Credits

Chat with us

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.

Playground

Assistants

Fine-tuning

API keys

Storage

Usage

Settings

API keys

Your secret API keys are listed below. Please note that we do not display your secret API keys again after you generate them.

Do not share your API key with others, or expose it in the browser or other client-side code. In order to protect the security of your account, OpenAI may also automatically disable any API key that we've found has leaked publicly.

Enable tracking to see usage per API key on the [Usage page](#).

NAME	SECRET KEY	TRACKING	CREATED	LAST USED	PERMISSIONS
[REDACTED]	sk-...IXfc	+ Enable	Jun 2, 2023	Mar 29, 2024	All
[REDACTED]	sk-...wXct	+ Enable	Jul 3, 2023	Apr 1, 2024	All

+ Create new secret key

Default organization

If you belong to multiple organizations, this setting controls which organization is used by default when making requests with the API keys above.

Note: You can also specify which organization to use for each API request. See [Authentication](#) to learn more.

Documentation

Help

All products

Personal

<https://platform.openai.com/fine tune>

3.7 LangChain

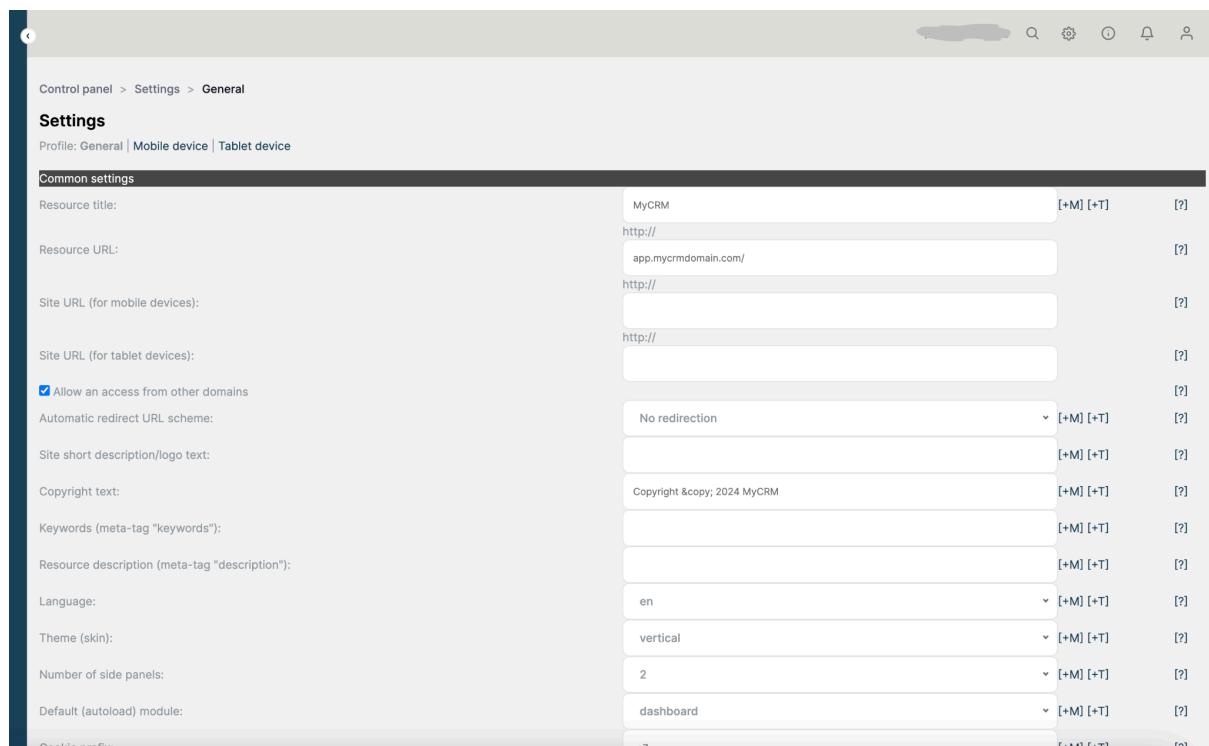
Use `http://134.122.112.73:8000/` address for LangChain URL and `6f05931d-7a4a-4f9f-ab3e-8b87cef6a7de` for LangChain Token

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 'General' settings page in the MyCRM Control Panel. The 'Common settings' tab is selected. The page includes the following fields:

- Resource title:** MyCRM
- Resource URL:** http://app.mycrmdomain.com/
- Site URL (for mobile devices):** http://
- Site URL (for tablet devices):** http://
- Allow an access from other domains:**
- Automatic redirect URL scheme:** No redirection
- Site short description/logo text:** Copyright © 2024 MyCRM
- Copyright text:** Copyright © 2024 MyCRM
- Keywords (meta-tag "keywords"):**
- Resource description (meta-tag "description"):**
- Language:** en
- Theme (skin):** vertical
- Number of side panels:** 2
- Default (autoload) module:** dashboard

Resource title - website title

Copyright text

Administrator's e-mail