



Official Installation Guide: WhatsApp SaaS CRM

Welcome to your new WhatsApp CRM! This document will guide you step-by-step through installing the software on an AWS Ubuntu server. Please follow these instructions sequentially. Do not skip any steps.

Part 1: System Requirements & Prerequisites

Before you begin, ensure you have the following ready:

1. Server Environment

- **Hosting:** A VPS or Cloud Server running **Ubuntu 20.04 or 24.04** (AWS Lightsail, DigitalOcean, etc.).
- **Web Server:** Apache or Nginx installed.
- **Database:** MySQL or MariaDB installed.
- **PHP:** PHP 8.1 or higher (with standard extensions like curl, pdo_mysql, zip).

2. Meta (Facebook) API Credentials

You must have an approved WhatsApp Cloud API account. Have these items copied into a notepad:

- **Phone Number ID**
- **WhatsApp Business Account (WABA) ID**
- **Permanent Access Token**
- **Facebook Business ID**
- **Phone Number**
- **Call back URL (Webhook)**
- **Verify Token**

3. Domain Name

- You need a domain or subdomain (e.g., `crm.yourdomain.com`) already pointed to your server's IP address via your DNS provider (like Route 53 or GoDaddy).

Part 2: Server Preparation (AWS / Ubuntu)

Log into your server using your terminal (SSH). If you are on AWS, your default user is likely ubuntu.

Step 1: Create the Web Directory

First, we need to create a folder to hold your CRM files. Replace `crm.yourdomain.com` with your actual domain name.

Bash

```
sudo mkdir -p /var/www/crm.yourdomain.com
```

Step 2: Temporarily Claim Ownership

To allow yourself to upload files via SFTP (like FileZilla), you must take temporary ownership of this folder.

Bash

```
sudo chown -R ubuntu:ubuntu /var/www/crm.yourdomain.com
```

Step 3: Create the Virtual Host

Tell your server how to route traffic to this new folder.

1. Open a new configuration file:

Bash

```
sudo nano /etc/apache2/sites-available/crm.yourdomain.com.conf
```

2. Paste the following block of text (change the ServerName and DocumentRoot to match your domain):

Apache

```
<VirtualHost *:80>
  ServerName crm.yourdomain.com
  DocumentRoot /var/www/crm.yourdomain.com

  <Directory /var/www/crm.yourdomain.com>
    AllowOverride All
    Require all granted
  </Directory>
</VirtualHost>
```

3. Save and exit (Press CTRL+O, then Enter, then CTRL+X).
4. Activate the site and restart Apache:

Bash

```
sudo a2ensite crm.yourdomain.com.conf
```

```
sudo systemctl reload apache2
```

Step 4: Secure with SSL (HTTPS)

Your CRM requires a secure connection. Run this command and follow the on-screen prompts to install a free Let's Encrypt certificate:

Bash

```
sudo certbot --apache -d crm.yourdomain.com
```

Part 3: Create the Database

Your CRM needs a blank database to store your messages and contacts.

1. Log into your MySQL database as the root user:

Bash

```
sudo mysql
```

2. Copy and paste the following commands one by one. *(Be sure to change `crm_db`, `crm_user`, and `StrongPassword123!` to your own secure choices).*

SQL

```
CREATE DATABASE crm_db;
```

```
CREATE USER 'crm_user'@'localhost' IDENTIFIED BY 'StrongPassword123!';
```

```
GRANT ALL PRIVILEGES ON crm_db.* TO 'crm_user'@'localhost';
```

```
FLUSH PRIVILEGES;
```

```
EXIT;
```

3. **Save these details in your notepad.** You will need them for the setup wizard!

Part 4: Upload and Secure the Files

1. Open your SFTP program (FileZilla, Cyberduck, etc.) and connect to your server.
2. Navigate to the `/var/www/crm.yourdomain.com` folder.
3. Upload the **CRM-SaaS-Release-V1.zip** file into this folder. (Download zip file from <https://crm.newcastlepartysales.com/CRM-SaaS-Release-V1.zip>)
4. Go back to your SSH terminal and extract the files:

Bash

```
cd /var/www/crm.yourdomain.com
```

```
unzip saas-release-v1.zip
```

(Note: Ensure the files extract directly into the folder, not into a sub-folder. You should see `install.php` sitting directly inside `/var/www/crm.yourdomain.com`).

5. Delete the zip file to save space:

Bash

```
rm CRM-SaaS-Release-V1.zip
```

6. **CRITICAL STEP:** Give ownership of the folder to the web server so it can properly install the software.

Bash

```
sudo chown -R www-data:www-data /var/www/crm.yourdomain.com
```

```
sudo chmod -R 775 /var/www/crm.yourdomain.com
```

Part 5: The Setup Wizard

You are now ready to install the software!

1. Open your web browser and go to your domain:
https://crm.yourdomain.com/install.php
2. **Database Connection:** Enter the Database Name, Username, and Password you created in Part 3. Leave the host as localhost.
3. **Admin Account:** Enter your Name, Email (which will be your login ID), and create a secure password.
4. Click **Install & Activate**.
5. The system will automatically build your database, connect to the Master License Server, and securely delete the installation files.
6. Click the link to log into your new dashboard!

Part 6: Post-Installation (Next Steps)

1. Connect WhatsApp Meta API

When you first log in, you will see a yellow banner stating the system is in "Read-Only Preview Mode."

- Navigate to **Settings**.
- Scroll down to the **WhatsApp API Configuration** section.
- Paste your Phone Number, Phone Number ID, WABA ID, FB Business, Access Token, Call Back URL (Webhook) and Verify token.
- Click **Validate & Save**. Once validated, the system will fully unlock.

2. Verify System Automation (CRON Jobs)

The installer attempts to silently configure background tasks (CRON jobs) for you.

- Navigate to **Settings**.
- If you **do not** see the orange "System Automation (CRON Jobs)" card, congratulations! The system successfully installed them for you.
- If you **do** see the orange card, your server requires manual entry. Simply copy the commands shown on the screen and add them to your server's Crontab (sudo crontab -u www-data -e).

3. Configure Your Meta Webhook For your CRM to receive incoming messages from customers, you must tell Meta where to send them.

- Navigate to your Meta Developer App Dashboard and click **WhatsApp > Configuration**.
 - Click **Edit** under the Webhook section.
 - Go to your CRM **Settings** page. Look at the blue **Webhook Setup** box.
 - Copy the **Callback URL** and **Verify Token** exactly as they appear in your CRM and paste them into the Meta dashboard. Click "Verify and Save".
 - Finally, click **Manage** next to Webhook fields in Meta and subscribe to `messages` and all other API endpoints.
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For questions and doubts, please talk or send messages to us.

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