Azure secret key

HLt8Q~BBfcuvaeDS3653VUAlM3I9ES6k-OO7VamX

Django secret key

!3wex44\*&k@a8%3z&a9kc43nd&65hp9jo1+v2l^b!udj$x)phe

python3 manage.py runserver

python runserver\_ssl.py

source venv/bin/activate

<http://localhost:8000/crm/send_email/>

<http://localhost:8000/login/>

<http://localhost:8000/grabmyfile/move_to_crm/>

<http://54.152.50.75:8000/>

Kill command if port in use

sudo lsof -i :8000

sudo kill -9 [54544]

sudo systemctl restart gunicorn

python manage.py makemigrations

python manage.py migrate

Ubuntu

cd /home/ubuntu/grabmyfile

Edit a file

nano settings.py etc

Amazon access key

AKIAZI2LE2FZ2J7XM2JA

Secret accesskey

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

ssh -i /Users/david/grabmyfile/grabmyfile\_project/grabmyfilekey.pem [ubuntu@54.152.50.75](mailto:ubuntu@54.152.50.75)

CREATE DATABASE grabmyfile\_db;

CREATE USER grabmyfile\_user WITH PASSWORD 'Aussieday2017';

GRANT ALL PRIVILEGES ON DATABASE grabmyfile\_db TO grabmyfile\_user;

Check files in Ubuntu

L

**Unzipping**

**Transfer zip file to Ubuntu**

scp -i /Users/david/grabmyfile/grabmyfile\_project/grabmyfilekey.pem grabmyfile.zip [ubuntu@54.152.50.75:/home/ubuntu/](mailto:ubuntu@54.152.50.75:/home/ubuntu/)

**Once connected to the server, navigate to the directory and unzip the file:**

cd /home/ubuntu/

unzip grabmyfile.zip

**Dump local backend database**

python manage.py dumpdata > data.json

**Transfer dump backend database to Ubuntu**

scp -i /Users/david/grabmyfile/grabmyfile\_project/grabmyfilekey.pem data.json [ubuntu@54.152.50.75:/home/ubuntu/grabmyfile/](mailto:ubuntu@54.152.50.75:/home/ubuntu/grabmyfile/)

SettleX

cd /home/Settlex/Settlex

**Directory path**

cd /

**Virtual environment**

source /home/Settlex/settlex-env/bin/activate

**Logs**

Cd /home/Settlex/Settlex/Settlex/

tail -f ~/Settlex/django.log

**Django shell**

python manage.py shell

**To locate and open a file**

nano settings.py etc path

sudo nano /etc/nginx/sites-available/settlex

**Copy files from Ubuntu**

cat settings.py | pbcopy

**Server**

python3 manage.py runserver 0.0.0.0:8000

**Nano files content copy and paste**

Example: cat views.py > output.txt

cat output.txt

The main Nginx configuration files are usually found in the following directories:

lrwxrwxrwx 1 root root 34 Dec 26 03:26 **default** -> /etc/nginx/sites-available/default

lrwxrwxrwx 1 root root 54 Dec 26 05:40 **settlex.onestoplegal.com.au** -> /etc/nginx/sites-available/settlex.onestoplegal.com.au

sudo nano /etc/nginx/sites-available/settlex.onestoplegal.com.au

**Gunicorn**

**Identify and Stop the Process Using Port 8000**

sudo lsof -i :8000

sudo kill <PID>

Restart Gunicorn

gunicorn --bind 0.0.0.0:8000 Project.wsgi:application

# Start Gunicorn

Nginx error log sudo tail -f /var/log/nginx/error.log

Nginx access log sudo tail -f /var/log/nginx/access.log

**For Gunicorn logs (via journalctl):** sudo journalctl -u gunicorn -f

sudo tail -f /var/log/nginx/error.log

sudo tail -n 100 /var/log/nginx/error.log

Troubleshooting

**Files checked**

Manage.py

Output.txt file

Requirements.txt

SettleX Urls.py

uwsgi.ini

views.py

settlements\_app admin.py

settlements\_apps.apps.py

settlements\_apps forms.py

settlements\_apps models.py

settlements\_apps urls.py

settlements\_apps views.py

settlements\_apps output.txt

templates base.html

templates dashboard.html

templates home.html

**1. Define the Features and Requirements**

Identify the core features you want to include in your CRM. Common features in a legal CRM like Clio include:

**“Client Management”** Manage client information, contacts, and communication.

* **Client Dashboard**: A dashboard displaying client information, files, recent activities, and notes.
* **Client Search and Filter**: Allow searching and filtering clients based on different criteria like name, email, file reference, etc.

### 2. **Contact Management**:

* **Contacts Associated with Clients**: Adding multiple contacts related to a client.
* **Contact Details**: Adding contact details, roles, and their relation to the client.
* **Editing and Deleting Contacts**: Features to edit and delete contact details.

### 3. **Communication Management**:

* **Email Integration**: Syncing emails related to clients.
* **Notes and Activities**: Adding notes, logging calls, and tracking activities related to clients.
* **Task Management**: Assigning tasks related to clients and tracking their completion status

**“Case Management:”** Track case details, status, and documents.

* **Billing and Invoicing:** Create and manage invoices, track billable hours, and handle payments.
* **Task Management:** Assign and track tasks and deadlines.
* **Document Management:** Upload, organize, and manage documents.
* **Calendar Integration:** Schedule and manage appointments, court dates, and meetings.
* **Email Integration:** Integrate with email services for communication tracking.

**1. Client Management:**

* **Client Profile:**
  + Create detailed profiles for each client, including personal information, contact details, and case history.
  + Add fields for additional information such as client address, notes, and custom fields.
* **Contact Management:**
  + Allow multiple contacts for a single client, including their roles and relationship to the client (e.g., family member, colleague).
* **Client Communication:**
  + Implement communication logs to track all interactions with clients, including emails, phone calls, and meetings.
  + Integrate email and SMS functionality to send communications directly from the platform.

**2. Case Management:**

* **Case Details:**
  + Create a case profile for each case, linking it to the respective client.
  + Include fields for case type, status, description, and important dates.
* **Case Documents:**
  + Allow uploading and organizing documents related to each case.
  + Implement version control for documents.

**3. Task Management:**

* **Task Lists:**
  + Create and assign tasks related to each case.
  + Set deadlines, priorities, and reminders for tasks.
* **Task Tracking:**
  + Track the progress of tasks and update their status (e.g., pending, in progress, completed).

**4. Calendar Integration:**

* **Event Scheduling:**
  + Schedule meetings, court dates, and other events.
  + Link events to clients and cases.
* **Reminders:**
  + Set up automated reminders for upcoming events.

**5. Billing and Invoicing:**

* **Time Tracking:**
  + Implement time tracking for billable hours.
  + Allow users to log time spent on tasks and cases.
* **Invoice Generation:**
  + Generate invoices based on time entries and fixed fees.
  + Allow customization of invoice templates.

**6. Document Management:**

* **Template Management:**
  + Create and manage document templates for common legal documents.
* **Document Automation:**
  + Auto-populate templates with client and case information.

**7. Client Portal:**

* **Secure Access:**
  + Provide clients with secure access to their profiles, case updates, and documents.
* **Communication:**
  + Allow clients to send messages and upload documents directly through the portal.

**8. Reports and Analytics:**

* **Dashboard:**
  + Create a dashboard to display key metrics such as the number of active cases, upcoming deadlines, and billable hours.
* **Reporting:**
  + Generate reports on various aspects of the practice, such as case status, task completion, and financials.