# Installation & Getting Started

## 1. Setup Database

Login to cPanel and create a **new database**.

- Login to your hosting cPanel and navigate go MySQL Databases
- Create database.
- Create user and set up user password.
- Add the user to the database by selecting the database and the username.
- Make sure you have checked **All privileges** when adding the user to the database.

## 2. Upload files to your server

**(Option : 1) In the root folder (inside public_html or www)**

- Upload the files to your server in the **same location** where public_html or www folder is located ( do not upload inside the public_html or www).
- The application comes with a folder called "**public**". Open the folder and move all the files and folders  to **public_html** or **www** folder and then delete the public folder
- Now from your browser go to **http://yourdomain.com/install**

**(Option : 2) In a sub folder**

Let's assume you have a folder called "**crm**" inside public_html or www on your server

- Upload the files to your server in the **same location** where the folder **crm** is located ( do not upload inside it).
- The application comes with a folder called "**public**". Open the folder and move all the files and folders  to the **crm** folder and then delete the public folder
- Now from your browser go to **http://yourdomain.com/crm/install**

**(Option : 3) In a sub domain directory**

Let's assume that you want your sub domain name to be called **crm** and you want to access the application using a url which will look something like this: http://crm.yourdomain.com.

- Create a folder called "**crm**" inside public_html or www on your server
- Upload the files to your server inside the folder **crm**
- From your hosting cpanel go to the subdomain option and create a new sub domain.
  - **Subdomain Name** : Enter your subdomain name. (In this case, enter **crm )**
  - **Document Root** : Enter **public_html/crm/public**
  - Finally click create
- Now from your browser go to **http://crm.yourdomain.com/install**

## 3. Installation

By this time you should be able to see the installation page if you have followed the above mentioned steps correctly.

1. The first page of the installation process checks and shows if your server meets the requirements of the application to run. Click **Next** if everything is alright. However, if any required php extension or folder permission is missing you have to take steps accordingly. If you do not have access rights to the system you might need to contact your hosting provider solve it for you.
2. In next page, enter your name, company name, currency, your email and password by which will login to the application after installation. After filling up the form, click next.
3. Enter your database access information  that you got after step 1 (Setup Database).
   1. Check if the base URL is correct
   2. In most cases the hostname is **localhost** but you should check with your hosting provider
   3. Finally Click on Connect Database
4. Click **Install**, if the installation is successful you will see a success message. If not it will provide a link to a file for you to download which will contain information about what went wrong. Open the file and see if it's something that you can resolve, if not then please contact us with the file.
5. After successfully installing click on **Go to Login Page** button and login to the application using the email and password you entered during instillation.

## 4. After Installation Setup

**General Information**

Go to **Settings** from the main navigation menu which is on left side, and update general information like company phone, email, address, city, state, country, money formatting options, time zone, language etc. Finally upload your company logo for both internal and external use. Optionally upload a favicon.

- **Configure Email**

  Read more on how to configure email by clicking here

  (Check this page if you want to disable email : How to disable email)
- **Cron Job**

  Read more on how to setup up cron by clicking here

  In case you don't want to enable CRON (but it is suggested that you use it for smooth

operation), make sure you disable the Job Queue option in Settings Page other wise your email won't be sent. click here for more details.

## Optional Setup & Information

User Roles

New User/ Team Member
Tax Rates
Payment Modes

Google Recaptcha
Setup real-time notification with pusher.com