

Simple CRM - Configuration Guide

Quick Reference: What to Customize

1. COMPANY BRANDING (PDF Quotes)

File: pdf_generator.py

Company Name & Address (Line 365-369)

```
company_address = """<b>YOUR COMPANY NAME</b><br />
123 Your Street<br />
Your City, ST 12345"""
```

PDF Title Banner (Line 147)

```
title_text = f"YOUR COMPANY | {customer_name.upper()}"
```

Brand Colors (Lines 17-19)

```
BRAND_RED = colors.HexColor("#d80010") # Primary color
BRAND_DARK = colors.HexColor("#0a1622") # Header background
```

2. PDF FILENAME

File: app.py (Line ~1360)

```
filename = f"YOURCOMPANY_{safe_name}_{quote.get('quote_number')}.pdf"
```

3. LOGO

File: static/logo.png

Replace with your logo. Recommended: 400x100 pixels, PNG with transparent background.

4. WEBSITE THEME COLORS

File: templates/base.html (Lines 10-18)

```
.gradient-bg { background: #0a1622; } /* Nav bar */
.btn-primary { background: #d80010; } /* Buttons */
```

5. TERMS & CONDITIONS

File: templates/quote_edit.html (Lines ~530-535)

Update the payment terms templates and your terms URL.

6. SHIPPING ORIGIN

File: shipping_calculator.py

```
DEFAULT_ORIGIN_ZIP = "37087" # Your warehouse ZIP
```

7. EMAIL INTEGRATION (Outlook)

Location: Settings > Email Integration in the app

Need: Azure App Registration, Client ID, Client Secret, Tenant ID

See OUTLOOK_SETUP_GUIDE.md for details.

8. PAYMENT & FINANCING LINKS

No code changes needed. Create links in Stripe/Approve and paste into quotes.

9. DATABASE BACKUP

File: crm.db - Contains all your data. BACK THIS UP REGULARLY!

FILES TO BACKUP BEFORE DEPLOYING

File	Contains
crm.db	All your data (contacts, quotes, deals)
static/logo.png	Your company logo
outlook_config.json	Outlook OAuth settings
ga_config.json	Google Analytics settings

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