

# **C&S Agency CRM Standalone Complete**

PHP/MySQL non-WordPress application installation and user guide

Version 1.0.0

# 1. Overview

This guide explains how to install and operate the standalone C&S Agency CRM application. This package does not require WordPress. It uses PHP, MySQL, HTML, CSS, and JSON files.

Area	Details
Technology	PHP 8.1+, MySQL/MariaDB, PDO MySQL, Apache/Nginx
Install file	installer.php
Main application	index.php
Uploads and backups	storage/
Design	Caring & Sharing styled admin interface, cards, navy headings, blue/green branding

## 2. Installation

Upload the application folder to your server.

Create a MySQL database and database user.

Open installer.php in the browser.

Enter database credentials and admin user details.

Complete installation and log in to index.php.

Delete or restrict installer.php after setup.

Go to System Health and confirm all tables exist.

## 3. First-Time Setup

Section	What to Do
Settings	Set brand name, logo URL, main agency, colors, GoSign default URL, and email settings.
Agents / Agencies	Create INS Marketing Systems, INC as the main agency, then create agencies/uplines and agents.
Agency Sites / PURLs	Create PURLs and access codes for agency recruiting workflows.
Lead Rules	Create fallback and agency-specific lead assignment rules.
Commission Rules	Set writing-agent commissions and agency override rules.
Backup	Create an initial backup after setup.

## 4. Core Modules

Module	Purpose
Command Center	Daily operations dashboard for leads, tasks, GoSign starts, appointments, and alerts.
Agents / Agencies	Manage agents, agencies, uplines, hierarchy, NPN, status, and onboarding.
Customers / Members	Track customers, household members, membership data, contributions, and status.
Leads & Distribution	Capture leads and distribute them manually or through rules.
Agency Sites / PURLs	Create agency-specific pages, access codes, PURLs, and GoSign routing.
GoSign Workflow	Optional access code or dropdown, agent name/NPN collection, agent linking, contracting pipeline creation.
Contracting Pipeline	Track contract start through activation with GoSign URL and completed contract file.
Tasks & Follow-Ups	Create tasks tied to agents/customers with status, priority, and due date.
Service Desk	Track support and follow-up requests.
Appointments	Manage appointment requests and meeting details.
Documents / Compliance	Upload agent/customer documents and expiration dates.
Certifications	Track testing and certificates.
Commissions	Configure commission rules, override rules, and statements.
Campaigns & Email Templates	Store communication templates and campaign records.
Form Builder	Create custom public forms and route submissions to leads.
Education Center	Store coverage comparison and education resources.
Reports	Review production, customer, agency, and commission metrics.
System Administration	Settings, backup, health, module manager, integrations, audit, users.

## 5. How Key Workflows Link Together

Workflow	Connection
Agency recruiting	Agency Site/PURL -> Lead Form or GoSign Card -> Lead/Agent -> Contracting Pipeline -> Onboarding/Tasks -> Active Agent.
No access code GoSign	Blank access code -> main/system agency

	assignment -> agent profile -> contracting pipeline.
Access code GoSign	Valid agency code -> linked agency/upline -> agent profile under agency -> pipeline.
Lead distribution	Lead -> Lead Rules -> Assigned Agent/Agency -> Task/Service/Recruiting follow-up.
Customer management	Customer -> Agent -> Contribution -> Commission Statement/Reports.
Compliance	Documents and Certifications -> status/expiration -> tasks/reminders/reports.
Commissions	Customers + Commission Rules -> Statements; Agency Hierarchy + Override Rules -> Override Reports.

## 6. Public Pages and Short Routes

Route	Purpose
/go/{purl-slug}	Agency PURL landing page route.
/gosign	Standalone GoSign Document Card route.
/form/{form-slug}	Custom public form route.
?comparison=1	Plan comparison page.
?appointment=1	Appointment scheduler page.

## 7. Backup and Restore

Use Backup & Restore to create downloadable JSON backups of CRM tables. Store backups outside the web server. Restore support is intentionally conservative; review backup contents before restoring to production.

## 8. Security Notes

- Use HTTPS.
- Delete or restrict installer.php after installation.
- Keep storage/ protected from executing PHP.
- Use a database user with only needed permissions.
- Back up files and database regularly.
- Review audit logs for exports, logins, GoSign events, and changes.

## 9. Troubleshooting

Issue	Fix
Installer cannot create config.php	Make the application folder writable

	temporarily or create config.php manually.
Missing tables	Log in and run System Health -> Repair Database Tables.
Uploads fail	Make storage/uploads writable and verify file size limits.
Emails do not send	Configure server mail or SMTP at hosting level.
Pretty URLs do not work	Use query string routes or configure Apache/Nginx rewrite rules.

## 10. Version Notes

Standalone Complete v1.0.0 converts the WordPress plugin concept into a non-WordPress PHP/MySQL application with matching design, installer, schema, authentication, core modules, public GoSign/PURL workflows, public forms, backup, health, and knowledge base foundations.