

General Settings

Overview

General Settings is where the system-wide configuration lives — company identity, communication providers, notification rules, backup settings, and shared lookup values used across modules.

Company Identity

Setting	Description
Site Name	The name of the CRM instance — appears in system emails and the browser tab.
Company Address	The company's registered address.
Logo	The company logo displayed in the system and on generated receipts. Must be an image file.
Tab Icon	The browser tab favicon. Must be a 16×16 px image file.

Document Fonts

Setting	Description
Download Documents Font Regular	The regular weight font used when generating downloadable documents (contracts, reservation forms, etc.).
Download Documents Font Bold	The bold weight font used in generated documents.

SMS Configuration

Setting	Description
SMS Provider	The SMS gateway provider to use for outgoing messages. Options: No SMS, Vodafone, Unifonic, Epush, SMSmisr, VictoryLink, TekEgy, SmartEgypt.
SMS Breakline	The line break character used by your SMS provider. Ask your provider which to use — common values are <code>\r\n</code> or <code>%0a</code> .
SMS Sender Name	The name that appears as the sender on outgoing SMS messages.
SMS Unifonic AppSid	The AppSid credential for the Unifonic provider (only required if Unifonic is selected).

Email (SMTP) Configuration

Setting	Description
SMTP Host (Outgoing Server)	The outgoing mail server address (e.g., smtp.gmail.com).
Encryption Type	The encryption method for SMTP. Options: No Encryption, SSL, TLS.
SMTP Port	The port number for the outgoing mail server (e.g., 465 for SSL, 587 for TLS).
Email Address	The email address used to send system emails.
Email Password	The password for the email account.

Notifications & Credentials

Setting	Description
Send User/Password to Client via Email	When ON, the system automatically sends login credentials to clients by email when their profile is created.
Send Username/Password to Broker	When ON, the system automatically sends login credentials to broker companies when their profile is created.
WaterMark On Media	When ON, a watermark is applied to all media files (images/videos) uploaded to the system.

Branches

A list of company branches that can be assigned to leads, tickets, and users. When **Make Branches Required when create lead** is ON, the branch field becomes mandatory on the Add New Lead form.

Client Requests Department

A list of departments used when creating client requests — used to route the request to the correct team (e.g., Sales, Customer Service, Accounting).

Campaign Lookup Values

These values populate dropdowns in the Marketing module when creating campaigns:

Setting	Used In
Campaign Type	The type of marketing campaign.
Campaign Purpose	The goal or purpose of the campaign.
Campaign Area	The geographic area targeted by the campaign.

Map Configuration

Setting	Description
Map API Key	The Google Maps API key used to enable map features in the system (e.g., location pinning on units and projects). See the video guide on how to get an API key.

Backup & Storage

Setting	Description
Backup CRM & Database Every Week	When ON, the system automatically creates a weekly backup.
Backup CRM & Database Every Day	When ON, the system automatically creates a daily backup.
Dropbox Authorization Token	The Dropbox token used to connect the system to a Dropbox account for cloud backup storage.
Backups in Dropbox	When ON, backups are saved to Dropbox instead of locally. Enabling this deletes all existing local backups.
Remove Old Backups in Dropbox	When ON, old backups stored in Dropbox are automatically deleted.

“ ⚠ Enabling **Backups in Dropbox** will permanently delete all existing local database backups — make sure you have a copy before switching.

[Dropbox Integration](#)

Sync Records

The CRM has a **mobile app available on both iOS and Android**. The **Sync Records** feature is specific to Android — it syncs the call log from the Android device and attaches call records to the relevant leads in the CRM.

“ 📱 iOS users have access to the mobile app but call log sync is Android only. If call records are missing on a lead or appear out of date, use Sync Records to force a manual update.

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