Support Board

DOCUMENTATION

SUPPORT BOARD RESELLER VERSION

Thank you for joining the reseller program! Please complete the steps below to start your new business with us.

POINT YOUR DOMAIN TO OUR SERVER RESELLER VERSION ONLY

1. Edit the DNS settings of your domain and add:
    a. Record type A with an empty string or your domain as hostname, and *18.135.143.205* as value
    b. Record type CNAME with *www* as hostname and your domain without www as value
2. We will only install Support Board on the given domain, we will not upload any landing pages or websites. For this reason, consider using a subdomain like chat.example.com

INFORMATION YOU MUST SEND US

Please send us all the information below. The services below are paid services but they include free tiers and free versions that will allow you to use them for free for your first customers. You can email the information to support@board.support. If you have the SaaS version you do not have to send us the information, instead enter them in the config file.

Your domain name RESELLER VERSION ONLY

The domain you want to use and points to our server. E.g. https://chat.example.com

Pusher

1. Pusher ID
2. Pusher Key
3. Pusher Secret
4. Pusher Cluster

How to get the information

1. Register to Pusher at https://pusher.com/.
2. Create a new channel and click the left menu *App Keys.*

Smtp

1. SMTP Host
2. SMTP Username
3. SMTP Password
4. SMTP Port
5. SMTP Sender email
6. SMTP Sender name

How to get the information

1. You can use any SMTP server but make sure it works correctly and emails are not sent to SPAM folder. Some of the best providers are https://sendgrid.com/ and https://www.smtp.com/.

Stripe

Stripe is available only in the countries listed at https://stripe.com/global. If your country is not listed use Rapyd instead, details are below.

1. Live Secret Key
2. Live Product ID (send only 1 product ID)
3. Currency code

How to get the information

1. Register a Stripe account at https://dashboard.stripe.com/register.
2. Activate your account at https://dashboard.stripe.com/account/onboarding
3. Visit https://dashboard.stripe.com/webhooks/ and add an end point, in *Endpoint URL* enter *https://your-domain/account/stripe.php* (replace *your-domain* with your domain of point 1). Listen for the following events: *checkout.session.async_payment_failed, checkout.session.async_payment_succeeded,checkout.session.completed, checkout.session.expired, invoice.paid, invoice.payment_failed, payment_intent.succeeded*.
4. Create a new product at https://dashboard.stripe.com/products/. Enter the product name and add a new price for each Support Board subscription you want to offer to your customers. Each price must have the following settings:

    a. Pricing model: *Standard pricing*
    b. Tax code: *Software as a service (SaaS)*
    c. *Recurring*
    d. Billing period: all values except “custom” are supported
    e. Include tax in price: *No*

5. Save the product and open it, you must use the ID. E.g. *prod_KeiX3uOIziW5UH*. Use only 1 product ID.
6. Get the secret key from https://dashboard.stripe.com/apikeys.
7. White Label option: If you want to offer the option to hide your brand from the chat widget, create a second product with 1 price and send the product ID.

How to create the memberships

1. Go to https://dashboard.stripe.com/products and select the product.
2. Add the prices within the product, ensuring each price follows the specified settings mentioned earlier.
3. Navigate to the Support Board super admin area to view the newly added prices. Finish the membership setup and save the changes.

Razorpay

Stripe is the recommended payment provider. Use Razorpay only if you cannot use Stripe.

1. Key ID
2. Key Secret
3. Currency symbol

How to get the information

1. Register a Razorpay account at https://razorpay.com.
2. Go to *Account & Settings* > *Webhooks* and add a new Webhook. Enter *https://your-domain/account/razorpay.php* (replace *your-domain* with your domain of point 1). Listen for the following events: "Payment Completed". Activate the following events: *payment.authorized, subscription.charged*.
3. Go to *API Keys & Plugins* and generate a new *Key ID* and *Key Secret* pair.

How to create the memberships

1. Go to https://dashboard.razorpay.com/app/plans and new plans. Each plan is a membership. The Billing Frequency must be *1 month* or *1 year*.
2. Navigate to the Support Board super admin area to view the newly added plans. Finish the membership setup and save the changes. To disable a plan, set the *quota* to *-1*.

YooMoney

Stripe is the recommended payment provider. Use YooMoney only if you cannot use Stripe.

1. Shop ID
2. Key Secret
3. Currency symbol

How to get the information

1. Register a merchant profile at https://yookassa.ru/.
2. Create a store and under *Integrations > API keys* you will find the *Secret Key*. Under the *Store settings* you will find the *Shop ID*.
3. From the left menu click *Integration > HTTP notifications*. As *URL for notifications* enter *https://your-domain/account/razorpay.php* (replace *your-domain* with your domain of point 1). Listen for all the events and save the changes.

How to create the memberships

1. Create them from the Support Board super admin area.

Rapyd

Stripe is the recommended payment provider. Use Rapyd only if you cannot use Stripe. Currently, Rapyd does not support recurring payments, so your customers will need to manually renew their Support Board Cloud subscription, it won't be automatic.

1. Access Key
2. Secret Key
3. Currency symbol
4. Country code

How to get the information

1. Register a Rapyd account at https://www.rapyd.net/.
2. Activate and verify your account.
3. Go to https://dashboard.rapyd.net/developers to get *Secret key* and *Access key*.
4. Go to https://dashboard.rapyd.net/developers and in Webhooks URL enter *https://your-domain/account/rapyd.php* (replace your-domain with your domain of point 1). Listen for the following events: *Payment Completed.*
5. Go https://dashboard.rapyd.net/settings/checkout-page, click the *link* icon and as enter *https://your-domain/account?tab=membership* (replace *your-domain* with your domain of point 1) as *Fallback URL*.
6. Get the currency symbol of your Support Board cloud business from https://en.wikipedia.org/wiki/ISO_4217#Active_codes (send us the code field).
7. Get the main country code of your Support Board cloud business from https://en.wikipedia.org/wiki/List_of_ISO_3166_country_codes (send us the ISO 3166-1 alpha-2 code field).

How to create the memberships

1. Create them from the Support Board super admin area.

Manual

Use the manual payment mode only when no other payment gateway is available. This mode enables adding membership plans, but payments and activations are not processed.

1. You must manually activate the membership from the super admin area.
2. You can renew an expired membership from the super admin area. To do so, open the customer profile panel and select the *Manual membership renewal* option under *Membership*.
3. Provide a link to redirect users when they attempt to purchase a membership or other items, along with the currency code you want to display.

Open Exchange

1. OpenExchange App ID

How to get the information

1. You Register an account at https://openexchangerates.org/ and get the *App ID* from the *App IDs* area.

OneSignal

1. OneSignal App ID
2. OneSignal App Key

How to get the information

1. You Register an account at https://onesignal.com/ and follow the docs at https://board.support/docs/#push.
2. As *Path to service worker files* and *Service worker registration scope* enter /.

WhatsApp (optional)

Required only if you want to allow users to use the WhatsApp integration in automatic sync mode.

1. Facebook App ID
2. Facebook App Secret
3. Embedded Signup Configuration ID
4. Facebook App Access Token
5. Webhook Secret Key

How to get the information

1. Follow the docs at https://developers.facebook.com/docs/whatsapp/solution-providers/get-started-for-tech-providers and you will get the App ID, App Secret and the Embedded Signup Configuration ID. The Webhook Secret Key is set by you.

2. The webhook URL must be https://[your-domain]/account/whatsapp.php. Replace *[your-domain]* with the URL of Support Board. The only webhook field to activate is *messages.*

3. Get the Facebook App Access Token from https://developers.facebook.com/tools/explorer. Under *User or Page* select *App Token.*

4. From the menu on the left side, click *App review > Permissions and Features* and request *Advanced Access* for *whatsapp_business_messaging*.

5. Create the *Embedded Signup flow* from *Left menu > WhatsApp > QuickStart.* Click *Embedded Signup*.

6. Your app must be submitted for review and approved by Meta. You can use the text at https://board.support/docs/files/facebook-review.txt and a video like https://board.support/docs/files/fb_whatsapp_review.zip for the review process. To send and receive messages you have to make the synchronization with a Facebook user that has all of the following settings:

    1. It is an admin of the app. You can add a user as an admin from https://developers.facebook.com/. From the left menu click *App roles > Roles* and add the user ID.

    2. It has *Full control* of the *Business portfolio* selected during the synchronization. You can grant full control to your user from https://business.facebook.com/. From the left menu click *Users > People*. Invite the Facebook user that own the app.

    3. It has *Full control* of the *WhatsApp account* selected during the synchronization. You can grant full control to your user from https://business.facebook.com/. From the left menu click *Account > WhatsApp Accounts,* select the correct WhatsApp account and click *Add*. You might also need to click the *Assign people* button and assign yourself to the newly created account.

    4. It has access to the app. You can add access to the app from https://business.facebook.com/. From the left menu click *Account > Apps* and add the Facebook app, then select the app, click *Assign people*, and add the

user to the app with *Full control*. If the app is not listed, click *Add > Request access to an App ID* and add your app. You may have to reconnect WhatsApp from *Support Board > Settings > WhatsApp > Cloud API settings > Reconnect.*

We can also create the app for you and get it approved for 150 USD.

Messenger and Instagram **(optional)**

Required only if you want to allow users to use the Messenger integration in automatic sync mode.

1. Facebook App ID
2. Facebook App Secret
3. Embedded Signup Configuration ID
4. Facebook App Access Token
5. Verify Token

How to get the information

1. Register a new account at https://developers.facebook.com/ or login with your existing account.
2. Create a new app, as app type select *Other*, then select *Business*. Enter a name, do not select any *Business portfolio*.
3. Set the app to *Live mode*.
4. From the menu on the left side, click *Add product* and select *Messenger*.
7. Click on *Configure* in the *Configure webhooks* section. Enter *https://your-domain/account/messenger.php*. Replace *your-domain* with the URL of Support Board. As *Verify Token* enter a strong password and send it to us. If you are using the reseller version, you must send us the *Verify Token* before you can complete

this step. In *Webhook Fields* select the following: *inbox_labels, message_deliveries, message_echoes, message_reactions, message_reads, messages, messaging_account_linking, messaging_handovers, messaging_optins, messaging_policy_enforcement, messaging_postbacks, messaging_referrals.*

5. From the menu on the left side, click *Add product* and select *Facebook Login for Business*.

6. From the menu on the left side, click *Facebook Login for Business > Configurations*. Add a new configuration. As *Choose login* variation select *General*. As *Choose access token* select *User access token*. Under *Choose permissions* select the following permissions: *business_management, instagram_basic, instagram_manage_messages, pages_manage_metadata, pages_messaging, pages_read_engagement, pages_show_list*.

7. From the menu on the left side, click *Facebook Login for Business > Configurations*. Copy the *Configuration ID*, it is the Embedded Signup Configuration ID.

8. From the menu on the left side, click *Facebook Login for Business > Settings*. In the *Valid OAuth Redirect URIs* area enter *https://your-domain/account/messenger.php*. Replace *your-domain* with the URL of Support Board. In the *Allowed Domains for the JavaScript SDK* area enter the URL of Support Board and enable the *Login with the JavaScript SDK* option.

9. From the menu on the left side, click *App review > Permissions and Features* and request *Advanced Access* for *public_profile, business_management, pages_manage_metadata, pages_show_list, pages_messaging, instagram_manage_messages, instagram_basic, pages_read_engagement, Business Asset User Profile Access*.

10. From the menu on the left side, click *Add product* and select *Instagram Graph API.*

8. From the menu on the left side, click *Messenger > Instagram settings* and in the *Webhooks* area enter *https://your-domain/account/messenger.php* as *Callback URL*. Replace *your-domain* with the URL of Support Board. As *Verify Token* enter a strong password and send it to us. If you are using the reseller version, you must send us the

Verify Token before you can complete this step. Click *Edit Subscriptions* and select the following: *messages, messaging_postbacks, messaging_seen, messaging_handover, message_reactions, standby.*

9. From the menu on the left side, click *App settings* > *Basic* and complete *Business verification* and *Access verification*. You must be verified on both.

11. Get *App ID* and *App Secret* from the menu on the left side. Click *App Settings* > *Basic*.

12. Get the Facebook App Access Token from https://developers.facebook.com/tools/explorer. Under *User or Page* select *App Token.*

13. Your app must be submitted for review and approved by Meta. You can use the text at https://board.support/docs/files/facebook-review.txt and a video like https://board.support/docs/files/fb_whatsapp_review.zip for the review process. To test Instagram, create a new Facebook developer account and add it as an administrator of your app from *App roles* > *Roles*. Then login to Instagram with the new Facebook account using the *Login with Facebook* option, and send a message to the synced Instagram Channel to see it in Support Board. If the *Login with Facebook* is not available or you already registered an Instagram account, visit https://accountscenter.instagram.com/ and under *Profile* add your Facebook developer account.

    We can develop the app, integrate it with Support Board, and have it approved for 150 USD.

Google (optional)

Required only if you want to allow users to use the Google integration in automatic sync mode.

1. Client ID
2. Client Secret

How to get the information

1. Follow the docs at https://board.support/docs/#google-sync.
2. You have also to submit the app for review and get approved for the live mode.
3. Users will have to purchase Support Board credits to use the automatic sync mode.

OpenAI (optional)

Required only if you want to allow users to use the OpenAI integration in automatic sync mode.

1. OpenAI API Key

How to get the information

1. Get it from https://platform.openai.com/api-keys.
2. Users will have to purchase Support Board credits to use the automatic sync mode.

Twilio for SMS (optional)

Required only to send SMS notifications and to validate the customer's phone number

1. Twilio SID
2. Twilio Token
3. Twilio Sender phone number

How to get the information

1. Register to Twilio at https://www.twilio.com/.
2. Follow the docs at https://board.support/docs/#sms.

Shopify (optional)

1. Client ID
2. Client Secret
3. App ID
4. Plans

How to get the information

1. Register at https://www.shopify.com/partners.
2. Create a new app to get Client ID, Client Secret, App ID.
3. In the "App Listing Area," under "Pricing Details," select "Manual Pricing" and "Recurring Charge." Then, in the "Recurring Charge Pricing Plans" section, add the first four plans from Support Board, starting with the free plan. Ensure the plans have same names and prices.

4. Your preferred membership system

You can use only one of the following systems:

1. **Users count.** Your customers will buy users quotas and the cost is linked to the number of registered users.
2. **Messages count.** Your customers will buy messages quotas and the cost is linked to the number of messages sent.
3. **Messages and agents count.** Your customers will buy messages quotas and agents quotas and the cost is linked to both the number of messages sent and the number of registered agents and admins.

More details

1. Only for the messages count. If a customer with an active membership upgrade to a new membership, the messages count doesn't restart, it remains the same.
2. Only for the messages count. The membership tier is based only on the number of messages sent each month. All messages are counted: chat messages from agents and users, direct messages, messages from users and agents, messages from the Dialogflow chatbot.
3. When the monthly message count exceeds the subscription quota(only for messages count) or the agents count(only for agents count) or the users count(only for users count system), or the membership is expired and not renewed, the admin area is disabled. The chat still works and receives messages, only the admin area is disabled. No messages are lost.
4. To offer unlimited agents set the quota to 9999.

5. How will your users purchase your membership plans? Once the installation is complete, everything will be ready and the users will be able to purchase your membership plans immediately. They will only need to register an account and purchase a plan from their account area.
6. The free quota is available only in the free plan. When the customer buys a paid membership, and the membership quota is reached, the account is suspended.
7. The free plan quotas cannot exceed 100 messages a month, 1 agent, 10 users.
8. There is a minimum quota related to the plan price. If you set a quota larger than the maximum quota for the plan price, the maximum quota will be used instead. To view the maximum quota, visit https://board.support/docs/files/saas_quota.txt.
9. You can manually renew a customer's subscription from the super admin area: open the edit customer window, and under "Membership" select " Manual membership renewal". Note that we will apply the 10% fee also to manual renewal, so only take this action when the subscription has expired or is about to expire in a few days.
10. The application of our 10% fee extends to credits purchased by customers.
11. You can manually assign credits to a customer from the super admin area: open the edit customer window, and under "Credits" enter the amount. Note that we will apply the 10% fee also to credits assigned manually.

Chat Direct Link (optional)

This feature provides a link in the user's account area that directs them to a page with a chat widget ready for testing. To use this feature, you have to create a dedicated subdomain and point it to our server.

If you have SAAS version, follow the steps below:

1. Download the files https://board.support/docs/files/chat-direct-link.zip and upload them on your subdomain. Edit the file *index.php* and replace *AAA* with the correct values.
2. Edit the file */script/config.php* and add the *DIRECT_CHAT_URL* constant. Enter the chat direct link URL.

Articles Direct Link (optional)

This feature provides a link in the user's account area that directs them to the articles page. To use this feature, you have to create a dedicated subdomain and point it to our server.

If you have SAAS version, follow the steps below:

1. Download the files https://board.support/docs/files/articles-direct-link.zip and upload them on your subdomain. Edit the file *index.php* and replace *AAA* with the correct values.
2. Edit the file */script/config.php* and add the *ARTICLES_URL* constant. Enter the articles direct link URL.

Your business and brand details

1. Your business name.
2. Your business full logo in SVG format. No transparent spaces around.
3. Your business logo icon in SVG format, icon only. It should be square size. No transparent spaces around

4. Your company details for tax purpose, we will send you the invoices with the details provided here.
5. Your documentation URL (optional).
6. The default Support Board language (optional) (default is English).

Affiliates system

The affiliate area is activated after setting the fee in *Super admin* > *Settings* > *Referral fee*. After activation, all users can access the affiliate area and their referral URL directly from the account page. Users have up to 180 days (6 months) to purchase a plan before the commission expires. Affiliates earn a commission on any membership purchase or renewal made within the 180 days period. Credit purchases are excluded. The white label add-on purchase is excluded. You can view all affiliate earnings and their payment details by navigating to *Super Admin* > *Affiliates*. From there, you have the option to reset each affiliate's earnings to zero. You should send the affiliate payment manually and immediately after the reset.

INFORMATION

1. The default language is English, if you want another default language let us know by email. The language can also be automatically detected from the user's browser language.
2. You can use our website for marketing reasons and for creating the website of your Support Board SaaS. Of course, you need to search and replace all Support Board

names, links, and related brand images. You can download our website optimized for the SaaS version at https://board.support/docs/files/website.zip

3. You can use our WordPress plugin https://wordpress.org/plugins/support-board-cloud/ and publish it on the WordPress plugins directory. Of course, you need to search and replace all Support Board names, links, and related brand images.
4. Customers will use your SMTP server as default server for all emails.
5. Customers receive email notifications when their membership quota is 90% full and when it is 100% full or has expired, in this case, the admin area is disabled. The chat will continue to work and no messages or users will be lost.
6. If you're using the cloud version the API URL is different: *YOUR-DOMAIN/script/include/api.php*. Also, customers have to use the token from Account > Installation > API token.
7. You can not create a PHP script with similar features of Support Board. You can not create a WordPress plugin similar to the WordPress version of Support Board. You can not promote, sell, or distribute your Support Board SAAS or Reseller version (also if only part of it) on https://appsumo.com (AppSumo) or https://codecanyon.net (CodeCanyon) or any other Envato website.
8. Attachments stored on the server's storage that are larger than 150KB are automatically deleted after 4 months. Attachments stored in AWS S3 are never deleted. You can use a software like https://s3browser.com/ to view and manage the AWS S3 files.
9. Free membership accounts that are older than 6 months and have been inactive for the past 6 months are automatically deleted.
10. The credits system allows users to purchase credits from you to access certain Support Board features that require external paid services (e.g., OpenAI). Support Board automatically deducts the appropriate amount of credits when these services are used. The credit cost is approximately double the amount you pay to the service provider (e.g., OpenAI). For example, if a user purchases $10 worth of credits and

uses them with OpenAI, you will pay OpenAI only $5, resulting in a $5 profit. For more details, visit https://board.support/docs/#cloud-credits.

11. For more information visit https://board.support/saas

INFORMATION RESELLER VERSION ONLY

1. We will send you an invoice for the payment of the fixed 10% fee of the earnings generated by selling Support Board Cloud memberships to your customers. We will email you the invoice every month or when you reach the $ 50 threshold.
2. If in the future your business is sold to another entity, the new entity is obligated to honour the license and pay us the 10% fees.
3. To avoid the 10% fee, you cannot create a cloud version account for yourself or for testing. Instead, contact us and we will send a copy of Support Board (PHP or WP version). Install it on your own server for unlimited access.

Thanks! If you are using the reseller version you can email the information to support@board.support. If your domain configuration and all information provided are correct, your reseller account will be ready within 48 hours.