

Formata

Delivery Specification and Third-Party Components

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About this document

This document defines what is delivered with Formata version 1.6.0, the environment the product requires, the licensing terms in functional outline and the third-party software components the product contains.

Prices, delivery dates and the parties' details are not part of this document; they are set in the contract.

1. Product identification

Item	Value
Product	Formata
Version	1.6.0
Release date	2026-10-05
Type of software	Metadata-driven server platform for building ERP/CRM business applications, with a browser client and a bundled CRM application
Deployment	Server software installed on the customer's infrastructure
Publisher	iMobile

Formata is a platform in which forms, queries, scripts, reports and business processes are stored as data in PostgreSQL and executed by the server without rebuilding the program. It ships with the Formata CRM application: customers, leads, deals, tasks, documents, mail, warehouse, budgets and business processes.

The program is installed on the customer's Linux server. It consists of the `crm_server` process (HTTP API, form engine, scheduler, Python worker processes), a PostgreSQL database, a static web client that the server delivers to the browser, and the CRM application, which is loaded into the database from SQL files. Users work in a browser. Channel encryption (HTTPS) is provided by the customer's reverse proxy. According to the vendor's website the same product is also offered hosted on iMobile servers; this documentation set describes installation on the customer's server.

2. Delivery set

2.1. Contents

- Server kit: the C++ source code of the server, the `CMakeLists.txt` build file, the `install.sh` installation script, a `Dockerfile`, the system database schema `sql/schema.sql`, service and database-role configuration files (the `deploy` directory)
- Web client (the `web` directory): the application, designer and monitoring pages
- The Formata CRM application: SQL files with the data structure, forms, queries, scripts, reports and the translation dictionary, and the `apply_crm_app.sh` script that applies them
- Documentation: this document set and the built-in help in the designer (the Documentation section)
- Version 1.6.0 is delivered without an activation key

2.2. Method of delivery

The kit is handed over to the customer under the contract after an order is placed on <https://new-imobile.com>. The Formata kit is not published in the public download section of the website.

2.3. Documentation

The documentation set consists of:

- Product Description and Functional Specification
- Installation and Administration Guide
- User Guide
- Software Lifecycle, Maintenance and Support
- Delivery Specification and Third-Party Components (this document)
- Security and Data Protection Statement
- a country annex for the customer's jurisdiction

3. Operating environment

3.1. Supported platforms

- Server: Ubuntu 24.04 LTS or Ubuntu 22.04 LTS
- Server in a container: an image based on Ubuntu 24.04, built from the `Dockerfile` included in the kit
- Database: PostgreSQL as shipped with the operating system (version 16 on Ubuntu 24.04) with the `pgcrypto` extension
- User workstation: a Chromium-based web browser (Google Chrome, Microsoft Edge); pre-release automated checks run in Chromium

3.2. Hardware and software requirements

- Hardware for a pilot installation: 2–4 CPU cores, 4–8 GB of RAM (per the product's built-in help; verified on a virtual machine with 4 cores and 4 GB)
- Disk space depends on the size of the database and attachments; the default limit for one uploaded file is 256 MB
- Build tools on the server: a C++17 compiler (GCC), CMake 3.20 or later, pkg-config
- Libraries: libpqxx, nlohmann-json, cpp-httplib, pybind11, Python 3 headers, hiredis, OpenSSL
- For print forms: WeasyPrint, segno, python-barcode, the Pango and HarfBuzz libraries, DejaVu fonts
- Network: one inbound TCP port for the service (8080 by default); a reverse proxy (for example nginx) for HTTPS access
- Optional: a Redis-protocol server for shared sessions when several service instances are run

4. Licensing

4.1. Editions and terms of use

An annual licence for a number of seats. Tiers: 5, 10, 25, 100, 1,000 and 5,000 seats; above 5,000 by separate agreement. The functional scope of the program does not depend on the tier. Updates and support during the licence term are included. Implementation and customisation are contracted separately.

4.2. Activation

Version 1.6.0 contains no activation or licence-checking mechanism: no key is entered, the program does not contact the vendor's account server and sends nothing to the vendor. The number of seats is limited by the contract; the program does not enforce it technically.

4.3. Updates

There is no automatic update and no check for new versions. A new version is delivered as a new set of files; the administrator replaces the server and web-client files, rebuilds the executable, re-applies the application SQL files without loading the initial data and restarts the service.

5. Interface languages

Shell: English, Russian, German, Spanish, French, Italian, Polish, Portuguese (Brazil), Turkish, Japanese, Korean, Chinese, Arabic and Persian (the last two right-to-left). CRM form labels are kept in a translation dictionary in the same languages; some strings produced by queries and scripts are shown in Russian only.

6. Third-party components

Component	Version	Licence	Purpose
PostgreSQL	—	PostgreSQL License	Database server; installed from the operating system, not part of the kit
pgcrypto (PostgreSQL contrib)	—	PostgreSQL License	Hashing of user passwords (bcrypt)
libpq	—	PostgreSQL License	PostgreSQL client library
libpqxx	7.8 (Ubuntu 24.04)	BSD-3-Clause	PostgreSQL access from the C++ server
cpp-httpplib	0.14 (Ubuntu 24.04)	MIT	HTTP server and HTTP client
nlohmann/json	—	MIT	JSON handling in the server
pybind11	—	BSD-3-Clause	Embedding the Python interpreter in the server
CPython	3.12 (Ubuntu 24.04)	PSF-2.0	Runs application scripts; the operating-system interpreter is used
OpenSSL	3	Apache-2.0	SHA-256, HMAC-SHA256, TLS for outbound connections
hiredis	1.1.0 (Ubuntu 24.04)	BSD-3-Clause	Redis client for the optional external session store
WeasyPrint	—	BSD-3-Clause	PDF generation for print forms; installed with pip together with its dependencies
Pango	—	LGPL-2.0-or-later	Text layout for WeasyPrint; system library
HarfBuzz	—	MIT	Text shaping for WeasyPrint; system library
DejaVu Fonts	—	Bitstream Vera / DejaVu Fonts License	Font for print forms
segno	—	BSD-3-Clause	QR codes in print forms

Component	Version	Licence	Purpose
python-barcode	—	MIT	Barcodes in print forms

Each third-party component is used under its own licence, named in the table. The table is a human-readable component list; a machine-readable bill of materials (SPDX or CycloneDX) is not part of this delivery.

7. Known limitations

- There are no binary installation packages, no automatic update and no built-in backup tools
- The server does not accept HTTPS connections; a reverse proxy with TLS is required
- There is no multi-factor authentication; sign-in through an external identity provider is limited to a login-and-password check
- Without an external session store (Redis) access tokens and open forms live in process memory and are lost when the service restarts
- Application scripts run in separate processes under an unprivileged operating-system account and a restricted database role, but with no restriction on network access or memory; the right to edit scripts should be given to trusted administrators only
- The `/healthz` and `/metrics` addresses respond without authentication; the telephony event endpoint accepts requests without a key until a key is set
- Changes made in the designer to the stock CRM forms, queries and scripts are replaced by the vendor's version when the application SQL files are re-applied
- Data at rest is not encrypted; the passwords of connected mailboxes are stored in the database in clear text
- The number of seats covered by the licence is not enforced by the program
- AI scoring of leads, when a key for the external service is configured, sends lead fields including contact details to that service; without a key a built-in rule-based calculation is used

Document history

Document version	Date	Product version	Change
1.0	2026-10-06	1.6.0	First issue