

“Anna – AI-Powered Copilot for Perfex CRM”

Transform your CRM experience with intelligent AI assistance. Anna provides a powerful chat interface to help you manage your Perfex CRM more efficiently with natural language interactions.

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Thank you for choosing the Anna module for Perfex CRM. If you have any questions beyond the scope of this document, please feel free to contact us via the [contact form here](#).

MINIMUM SYSTEM REQUIREMENTS

Perfex CRM: 2.9.0 or higher

PHP: 7.4 (recommended 8.1 or higher)

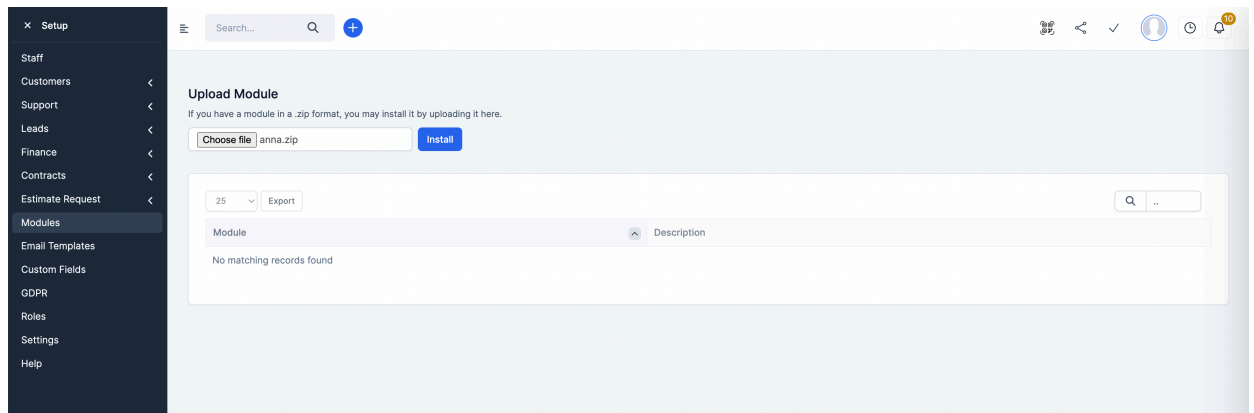
MYSQL: 5.7 (recommended 8.0 or higher)

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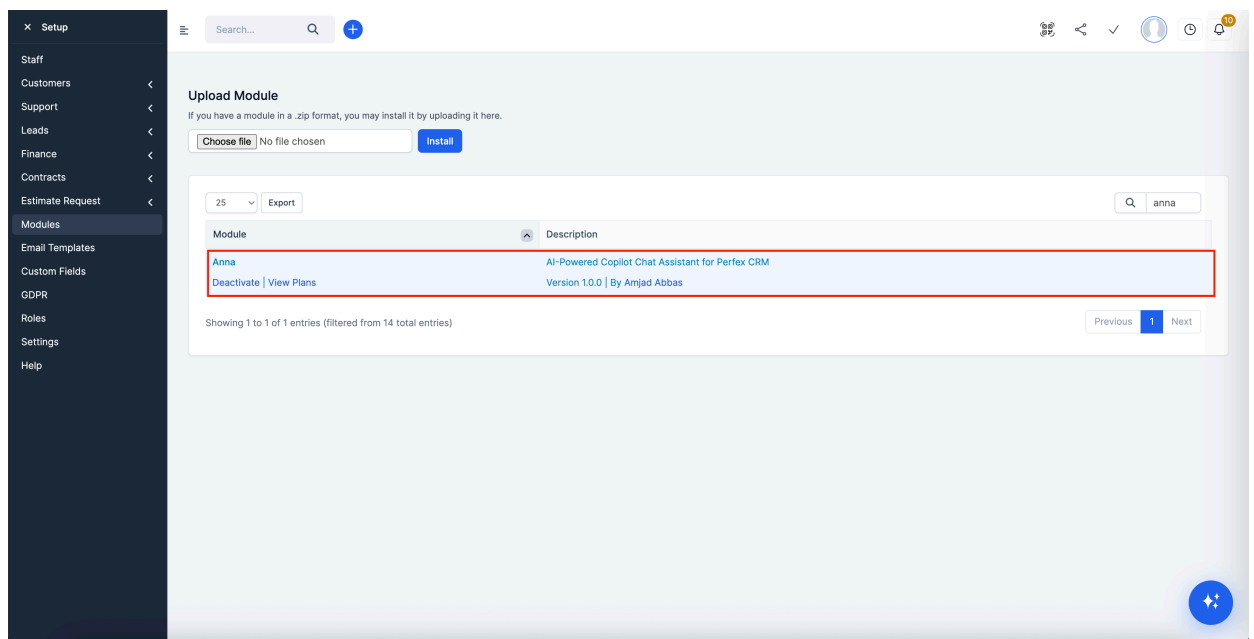
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• Upload & Activate the Module

1. Go to Perfex CRM's Admin area and select the following menu item: **SETUP > MODULES**.
2. Upload the **.zip file of Anna** in the Module installation page and click **INSTALL**.



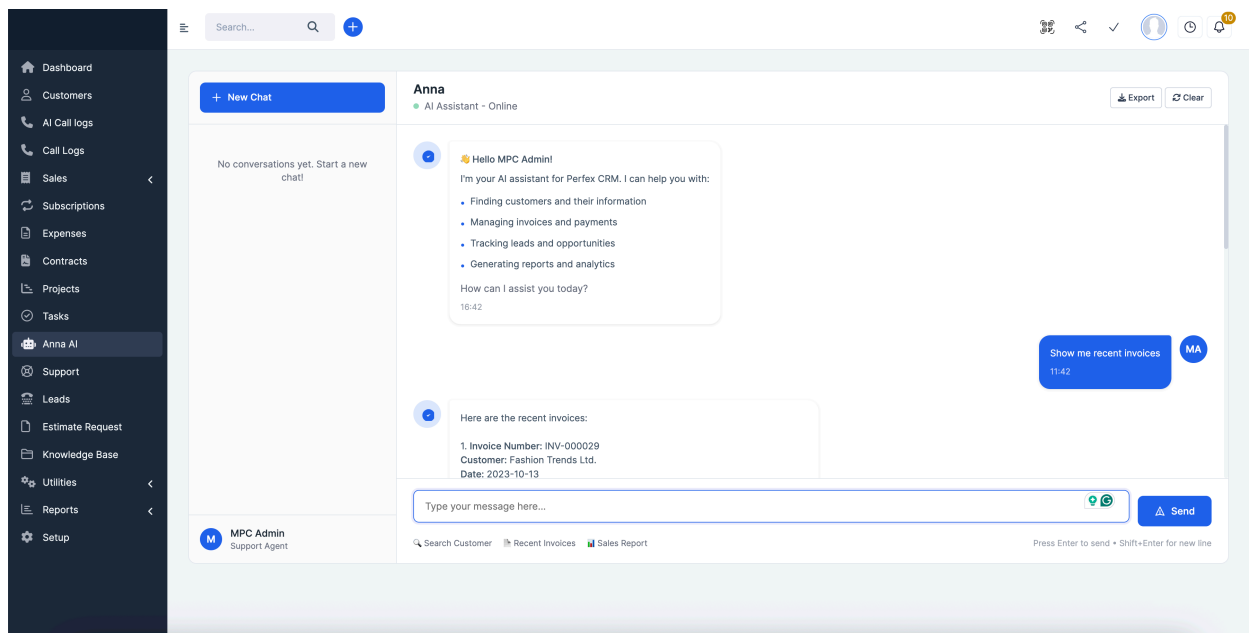
3. Find the newly installed module (Anna) and press **ACTIVATE**.



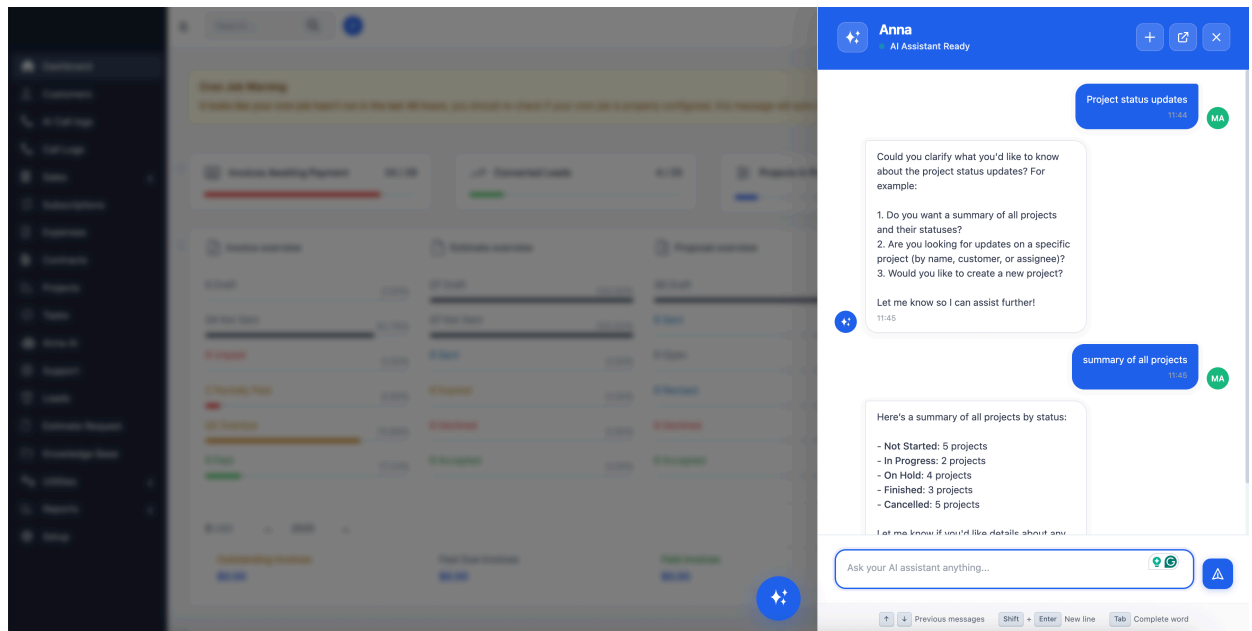
4. You will receive a confirmation alert indicating the module has been successfully activated.

• Using Anna Chat Assistant

- Once the module is activated, you can access the Anna chat assistant from the main menu in the admin area.



- The chat widget will also appear in the bottom right corner of your admin pages for quick access.



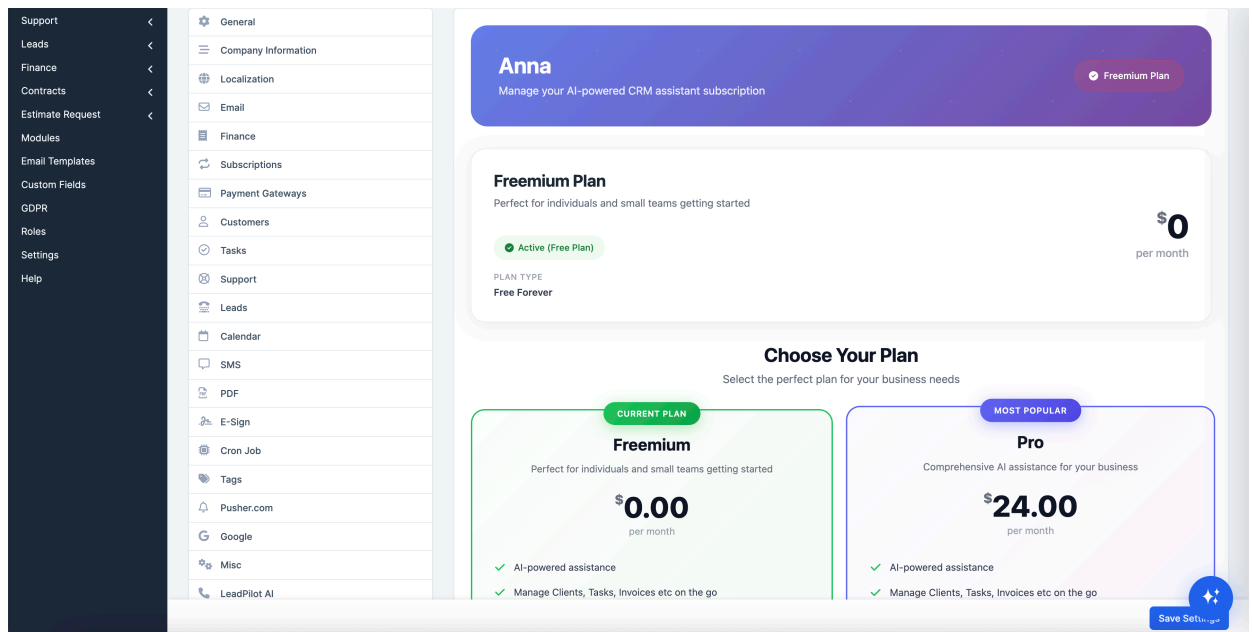
• Subscription Plans & Upgrade

Anna offers flexible subscription plans to meet your business needs:

- **Freemium Plan:** Included with your CodeCanyon license purchase. This plan provides basic AI assistance features and is valid as long as your CodeCanyon license support is active. If your license support expires, the AI chat assistant will stop working and you'll need to either extend your license or upgrade to the Pro plan.
- **Pro Plan:** For higher usage and advanced features. Perfect for teams and businesses with extensive CRM operations.

Managing Your Subscription

1. Go to **SETUP > SETTINGS** in your Perfex CRM admin area.
2. Navigate to the **Anna** settings tab.



3. From the plan information page, you can:
 - Upgrade to Pro Plan for enhanced features
 - Manage your subscription (cancel, downgrade, or upgrade)
 - Access billing history and invoices

How to Upgrade to Pro Plan

1. Access the plan information page as described above.
2. Click on **"Upgrade to Pro"** button.
3. Select the monthly billing option.
4. Complete the payment process.
5. Your account will be instantly upgraded with increased limits and pro features.

Note: All subscription management including upgrades, downgrades, and cancellations can be handled directly from the dedicated plan information page within your Perfex CRM settings.

- **FAQs**

1. **Do I need any code changes to use the module?**

No, this module is designed to work out of the box with no code modifications.

2. **Do I need Perfex CRM to use this Module?**

Yes, this module requires Perfex CRM to function. You can purchase Perfex CRM [here](#).

3. **How do I get Support?**

For any support inquiries, please reach out to us via the contact form [here](#).

- **Troubleshooting**

1. **Issue: The module is not activating.**

Try re-uploading the module zip file and ensure you are using the latest version of Perfex CRM.
