

How to install a Call Log Module in Perfex CRM.

Call Log

How can I organise customer calls in perfex CRM?
Say hello to the Perfex call logger.

- Quickly log your sales calls.
- Track all Customers and Leads calls
- From call duration to conversation summary
- Don't forget to call back with follow up reminders
- Reinforce existing customer relationships.
- Keep team members informed.
- Quick daily, Weekly, Monthly overview report

A Prefex module that requires Perfex CRM

Verison 1.0



DOWNLOAD THE FILES

- 1.Go to your download section and download the module files to your desktop from <https://codecanyon.net/>
- 2.Using a file decompressor like winzip or winrar extract the content of the folder you download.
- 3.go to you Perfex CRM, go to the menu and click on SETUP > MODULES
4. upload the zip call_logs 1.1.1.3(see image), if you want to save call logs for leads, an additional step is required, see step 5. **NOTE: ensure you increase those values on your server upload_max_size or the module will not install on your perfex speak to you hosting.**

call_logs 1.1.1.zip	2,645,362	2,114,815	WinRAR ZIP archive	30/09/2020 16:04	F19A380B
Goals 1.0.0.zip	47,110	39,107	WinRAR ZIP archive	18/08/2020 10:31	9BDB0DD5
Leads Call Log Tab.zip	4,907	4,680	WinRAR ZIP archive	22/08/2020 15:26	16092E39

5. Leads. When u download the module you first need to unzip the package in the package you will find a another zip “Leads Call Log Tab.zip” this is the file that needs to be replaced to allow the call log tab for leads, Perfex doesn’t provide a webhook for leads so this is a work around, **please ensure you back up the existing file before you replace the existing. If you need help with this please contact us with your FTP details.**
- 6.Goals: In the module we have included an update to create goals for the number of calls for each staff, if you wish to use it please use the update goals module include.
- 7.Reminders: All follow up calls are saved in the calendar as a reminder, search for the extra tab “Call Log” in the contact or lead.

Note: always ensure you always have the latest version of the module

MODULE UPLOAD SECTION

If you have a module in a .zip format, you may install it by uploading it here.

* Upload Module

Choose file

No file chosen

INSTALL

INSTALLATION COMPLETED

1.Once you have completed the upload the module should now ben installed

Note: if your upgrading the module ensure you click on the yellow link “Upgrade database”

Call Logs	Default module for defining call logs
Deactivate	Version 1.1.1 By Weeb Digital

CONFIG TWILIO API TO MAKE CALLS

If you want to make call directly from your perfex crm, you have to sign up to twilio api if you have an account already go head and login. Click here to get started if you don’t already have an account <http://www.twilio.com/referral/kv9Dk5>. Go to your console <https://www.twilio.com/console> and make a note of the following ACCOUNT SID, AUTH TOKEN, TELEPHONE NUMBER.

Note: if your using a trial account to just try it out you can only call verified numbers in twilio.

UPDATE SETTING IN PERFEX

Now that you have your account SID, AUTH TOKEN, TELEPHONE NUMBER from your Twilio account your ready to save the settings in Perfex CRM, by going to SETUP > SMS > TWILIO just cut and past the settings carefully in to the setting section in SMS. For example, <http://prontoinvoices.com/admin/settings?group=sms> save and your all done ad ready for calls.

Note: currently you can only make calls and we will update the module to receive calls also.

Twilio

Twilio SMS integration is one way messaging, means that your customers won't be able to reply to the SMS. Phone numbers must be in format E.164. Click [here](#) to read more how phone numbers should be formatted.

Account SID

Auth Token

Twilio Phone Number

Active

☐ Yes ☒ No

CREATING YOUR OWN CALL TYPES

Go to SETUP > CALL LOGS > type

NEW TYPE

25

EXPORT



Search...

Name



Options

124



Appointment



Cold Calling



Estimate - Related

General Call



Proposal - Related

Referral Call



Review Call



Satisfaction Call



Showing 1 to 9 of 9 entries

Previous

1

Next