

Add-on SMS Manager Module of Perfex CRM

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Description:

Add-on SMS Manager allows you to create and manage more SMS triggers in Perfex CRM.

By using this module, you will be able to create new SMS triggers which will be sent automatically. You can send manual custom SMS to Clients, Leads, Staff members.

Save Custom SMS Templates, to use in future.

This module uses default SMS gateway activated in Perfex crm.

This module is user friendly, quick and easy to install and use.

All allowed Staff members can access this Module to send custom SMS.

Note: If you are installing first time, then Upgrade is not required. Upgrade is only required when you have already installed our module and there is new version updates available of module.

Steps to Upgrade:

Step 1. Upgrade Files:

You have two options to upgrade Module files.

Option 1:

You will get si_sms.zip file in All files Directory. You can use this zip file to Install this module in Perfex CRM. Just like you are Installing New Module.

Go to Perfex CRM->SETUP-> Modules.

Upload Module zip file and click Install button.

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

Upload Module

Choose File si_sms.zip INSTALL

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Module	Description
Database Backup	Default module to perform database backup
Activate	Version 2.3.0
Goals	Default module for defining goals
Deactivate	Version 2.3.0
Add-on SMS Manager	Module provides new SMS Triggers and gives custom SMS send functionality. This module do not affect on any default SMS triggers.
Deactivate SMS Settings Upgrade Database	Version 1.0.1 By Sejal Infotech

You will be able to see 'Add-on SMS Manager Module in list of Modules and Upgrade Database link. So Files are upgraded.

Option 2:

If you do not want to Install that zip file again in Upgrade, then you can unzip that file in **PERFEX_CRM_PATH/modules/** directory where **si_sms** directory is there. You can replace this directory by unzip folder.

Step 2. Upgrade Database:

After Upgrading files, you will see "Upgrade Database" link in SETUP-> Modules->Add-on SMS Manager.

The screenshot shows the Perfex CRM interface. On the left is a sidebar menu with options: Setup, STAFF, CUSTOMERS, SUPPORT, LEADS, FINANCE, CONTRACTS, MODULES (highlighted with an orange badge), EMAIL TEMPLATES, CUSTOM FIELDS, GDPR, ROLES, and MENU SETUP. The main content area is titled 'If you have a module in a .zip format, you may install it by uploading it here.' and includes an 'Upload Module' section with a 'Choose File' button (showing 'si_sms.zip') and an 'INSTALL' button. Below this is a table of installed modules. The 'Add-on SMS Manager' module is highlighted in yellow and includes links for 'Deactivate', 'SMS', 'Settings', and 'Upgrade Database' (which is underlined in red). The table also shows descriptions and versions for 'Database Backup', 'Goals', and 'Add-on SMS Manager'.

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Click on that Link and Database will be Upgraded.

That's it....