

# Add-on SMS Manager Module for 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.

You can send scheduled SMS to Clients, Leads, Staff members.

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.

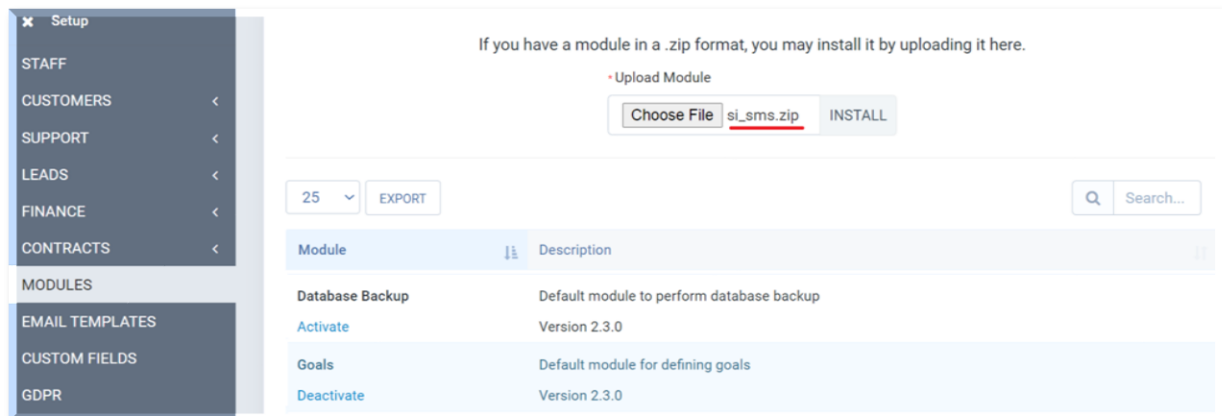
## Steps to Use:

### 1. Quick Install:

You will get si\_sms.zip file in **All files** Directory. You can use this zip file to Install this module in Perfex CRM.

Go to Perfex CRM->SETUP-> Modules.

Upload Module zip file and click Install button.



You will be able to see '**Add-on SMS Manager**' Module in list of Modules.

Click on Activate it.

You will see "**Validate**" link, after activation, to validate your purchase. Click on that validate link and enter your purchase code, that you got at the time of purchase module.

For more details on How to get Purchase code see :

<https://help.market.envato.com/hc/en-us/articles/202822600-Where-Is-My-Purchase-Code->

Validate your Purchase, by entering purchase code.

That's it.

## **2. Settings for Add-on SMS**

To manage settings for Module, go to **SETUP -> Settings -> Add-on SMS Settings**.

**Send Custom SMS to Customer's contacts** field is used when you want to send custom SMS to clients. You can set either send SMS to primary contact only or All contacts or to client's phone number only.

**Send Add-on Trigger SMS to Client's number** field is used when SMS triggers are getting sent to clients. If it set to Yes, than first Primary contact will be checked of that client, if primary contact number is not available, then SMS trigger will be sent to Client's phone number.

**Skip SMS for DRAFT Status** field is used to skip SMS when Status of Invoice, Estimate or Proposal is DRAFT at the time of creation. If it set to Yes, then SMS will not be sent when Status is DRAFT.

**Status changed triggers** are used when status of Project, Lead, Invoice or Ticket is changed than, it will trigger SMS. You can set statuses here, for which, you **do not want** to trigger SMS send. For example, here you set Status of Project as "Cancelled", than for project status changed to cancelled, will not get triggered and client will not receive any SMS for that.

**Scheduled SMS** will set to delete automatic scheduled SMS log for executed before set days. For example, admin wants to delete log of before 30 days, then he can set number of days as 30. So all scheduled executed SMS Log will be removed from the system.

### 3. Set Add-on SMS Triggers

To manage SMS triggers you can go to **SETUP -> Settings -> SMS**.

Here, we have added more SMS triggers like :

Send SMS to client/primary contact when

- New Project, Invoice, Proposal, Estimate, Contract, Support Ticket, Credit Note, Lead is Created
- Status Changed of Projects, Invoices, Leads, Support Tickets.

The screenshot displays the 'SMS Triggers' configuration page. It features three distinct trigger settings, each with a title, a description, and a text area for the SMS message. The first trigger is 'Staff Reminder', which is triggered when staff is notified for a specific custom reminder. The second is 'New Project Created (to customer)', triggered when a new project is created for a client, with an 'Add-on SMS' button. The third is 'New Invoice Created (to customer)', triggered when a new invoice is created for a client, also with an 'Add-on SMS' button. Each trigger has a text area containing a sample message with merge fields like {contact\_firstname}, {contact\_lastname}, {project\_name}, and {invoice\_number}. A link 'Available merge fields' is present next to each trigger's title. The interface is clean with a light blue and white color scheme.

**Staff Reminder** [Available merge fields](#)  
Trigger when staff is notified for a specific custom reminder.

**New Project Created (to customer)** [Add-on SMS](#) [Available merge fields](#)  
Trigger when New Project is Created for Client, SMS will be sent customer Primary contact (or to Client).

Hello {contact\_firstname} {contact\_lastname},  
New project is created {project\_name} .

**New Invoice Created (to customer)** [Add-on SMS](#) [Available merge fields](#)  
Trigger when New Invoice is Created for Client, SMS will be sent customer Primary contact (or to Client).

Hello {contact\_firstname} {contact\_lastname},  
New invoice is created {invoice\_number}

**New Proposal Created (to customer)** [Add-on SMS](#) [Available merge fields](#)

If you do not want to trigger SMS for any field, you can keep it blank.

#### 4. Use from Main Menu "Add-on SMS"

User will see this module in Main Menu called "Add-on SMS". All users have permission to access this module.

- A) Click on **Main Menu -> Add-on SMS -> Send Custom SMS**, to send custom sms to Clients or Leads or Staff Members.

The screenshot shows the 'Send Custom SMS' page. On the left is a sidebar menu with options: DASHBOARD, CUSTOMERS, SALES, SUBSCRIPTIONS, EXPENSES, CONTRACTS, PROJECTS, TASKS, ADD-ON SMS (selected), and SUPPORT. Under 'ADD-ON SMS', there are buttons for 'Send Custom SMS' and 'SMS Templates'. The main content area is titled 'Send Custom SMS'. It has a section 'Select Options to Send to' with three radio buttons: 'Customers' (selected), 'Leads', and 'Staff Members'. To the right are two dropdown menus: 'Customers' (showing 'Nothing selected') and 'SMS Templates' (showing 'Nothing selected'). Below these is a text area for 'SMS Text' with a placeholder 'Available merge fields'. At the bottom are 'SEND' and 'CLEAR' buttons.

Staff member who have rights to access all client, will be able to send SMS to all clients.  
Staff members who have rights to see all leads, will be able to send SMS to all leads.  
Staff members who have rights to see other staff view rights, will only be able to send SMS to staffs.

- B) Click on **Main Menu -> Add-on SMS -> SMS Templates**, to add/ update/ delete predefined templates for SMS.

The screenshot shows the 'Add-on SMS Manager - SMS Templates' page. The sidebar menu is the same as in the previous screenshot, with 'ADD-ON SMS' selected and 'SMS Templates' highlighted. The main content area is titled 'Add-on SMS Manager - SMS Templates' and includes an 'ADD' button in the top right. Below the title are a dropdown for '25' items and an 'EXPORT' button. A search bar with a magnifying glass icon and the text 'Search...' is on the right. A table with the following columns is displayed: '#', 'Template name', 'SMS Text', and 'Actions'. The table contains one entry: '1', 'Greetings SMS', 'Hello (name), Happy Diwali to all of you.', and an 'Actions' column with edit and delete icons. Below the table, it says 'Showing 1 to 1 of 1 entries'. At the bottom right are 'Previous', '1' (highlighted), and 'Next' buttons.

You can use this template to send Custom SMS, by selecting that template in Custom SMS page.  
Every staff will have his own template for SMS.

- C) Click on **Main Menu -> Add-on SMS -> Schedule SMS**, to set scheduled Date when custom sms to Clients or Leads or Staff Members will be triggered automatically.

#	Schedule Date	Related To	SMS Text	Created by	Created at	Executed
10	20-04-2023 12:58:22	Leads	Hello (name), text of template 1		20-04-2023 12:57:16	✓
11	20-04-2023 13:38:57	Customers	Hello (name), text of template 1		20-04-2023 13:39:35	✓

**Note : Admin will required to set Cron Jobs in Server for Perfex CRM.**

**See help here:** <https://help.perfexcrm.com/setup-cron-job/>

Staff member who have rights to access all client, will be able to set schedule SMS to all clients.  
Staff members who have rights to see all leads, will be able to set schedule SMS to all leads.  
Staff members who have rights to see other staff view rights, will only be able to set schedule SMS to staffs.

Admin and Staff can see List of Scheduled SMS Log and Edit the scheduled SMS if it has not been executed.

If staff has rights to view Own scheduled SMS only, then he will be able to manage his scheduled SMS log only.

## **5. How to Remove this Module**

If you want to remove this module, then Go to **SETUP -> Modules -> Add-on SMS Manager** and click on Deactivate it. So this module will be disable for all.

## **6. How to add your own Language Tags in Module**

By default this module is created using English language Tags. If you want to add your own language which is supported by perfex crm for example "French", then follow these steps:

1. Go to the files path where perfex crm is Installed.
2. Go to folder "modules -> si\_sms -> language" then copy folder named "english" and rename that new folder to "french".

3. Now you will have two folders english and french . Go to french folder and edit the file called si\_sms\_lang.php

4. There is text written in english like,

```
$lang['si_sms_menu'] = 'Add-on SMS';  
$lang[' si_sms_custom_send_menu'] = ' Send Custom SMS';  
.....
```

you can change text here from '**Send Custom SMS**' to your text at right hand side.

So it will be like this

```
$lang['si_sms_menu'] = 'Your Text';  
$lang[' si_sms_custom_send_menu'] = 'Your Text 2';  
.....
```

you can change any text that you want to change at the right hand side.

If you find any difficulty, you can contact us.

**Thanks. I hope you will enjoy using this Module...**