

Lead Follow up Scheduler Module of Perfex CRM

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Description:

Lead Follow up Scheduler allows you to send follow up SMS to Leads in Perfex CRM.

This module is not a standalone script, it is module of Perfex CRM.

Perfex CRM is already approved in Codecanyon <https://codecanyon.net/item/perfex-powerful-open-source-crm/14013737>

By using this module, Admin and staff will be able to create schedule to send automatic SMS to the leads after specified interval of Lead creation. So admin will not lose their leads, if leads are not having any progress.

Staff can set a schedule for one time only, to send automatic follow up SMS for every upcoming Leads.

All allowed Staff members can access this Module to set Scheduled 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:

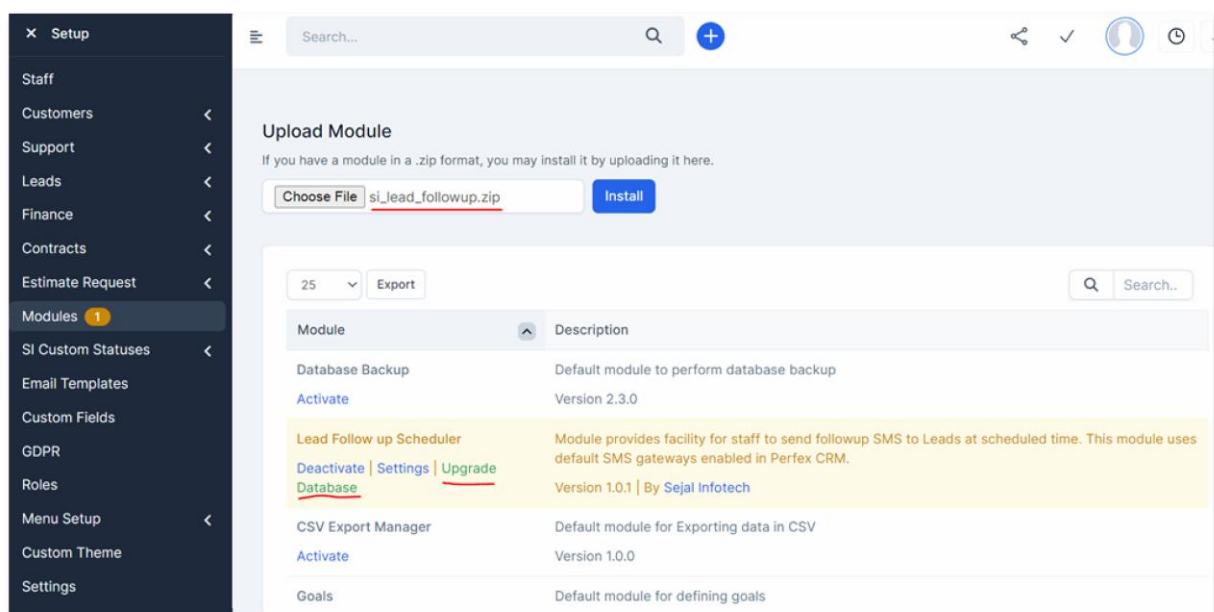
You have two options to upgrade Module files.

Option 1:

You will get si_lead_followup.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 Admin Menu -> SETUP -> Modules.

Upload Module zip file and click Install button.



You will be able to see '**Lead Follow up Scheduler**' 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_lead_followup** 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 -> Lead Follow up Scheduler.

The screenshot shows the 'Setup' menu on the left with 'Modules' selected. The main area is titled 'Upload Module' and contains a file upload section with a 'Choose File' button and a text input field containing 'si_lead_followup.zip', followed by an 'Install' button. Below this is a table of modules. The 'Lead Follow up Scheduler' module is highlighted in yellow and has links for 'Deactivate', 'Settings', and 'Upgrade Database' (which is underlined in red). The 'Database Backup' module has an 'Activate' link. The 'CSV Export Manager' module has an 'Activate' link. The 'Goals' module has no visible links.

Module	Description
Database Backup	Default module to perform database backup Version 2.3.0
Lead Follow up Scheduler	Module provides facility for staff to send followup SMS to Leads at scheduled time. This module uses default SMS gateways enabled in Perflex CRM. Version 1.0.1 By Sejal Infotech
CSV Export Manager	Default module for Exporting data in CSV Version 1.0.0
Goals	Default module for defining goals

Click on that Link and Database will be Upgraded.

That's it....