

# Advanced To Do Manager Module of Perfex CRM Upgrade

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## Description:

**To do Manager** allows you to create and manage To do with more precisely in Perfex CRM.

By using this module, you will be able to create new todo and manage it with Category and Priority. Also you can manage sequence/order and colour of category and Todo. You will be able to track pending to dos category wise.

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

All allowed Staff members can access this Module.

## Steps to Upgrade:

### Step 1. Upgrade Files:

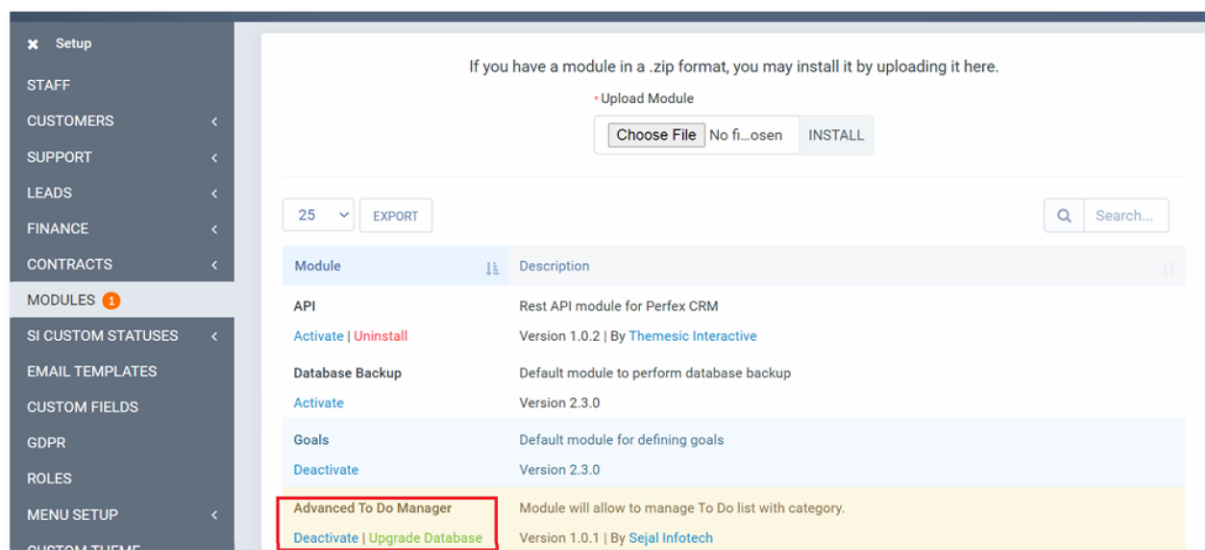
You have two options to upgrade Module files.

#### Option 1:

You will get si\_todo.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.



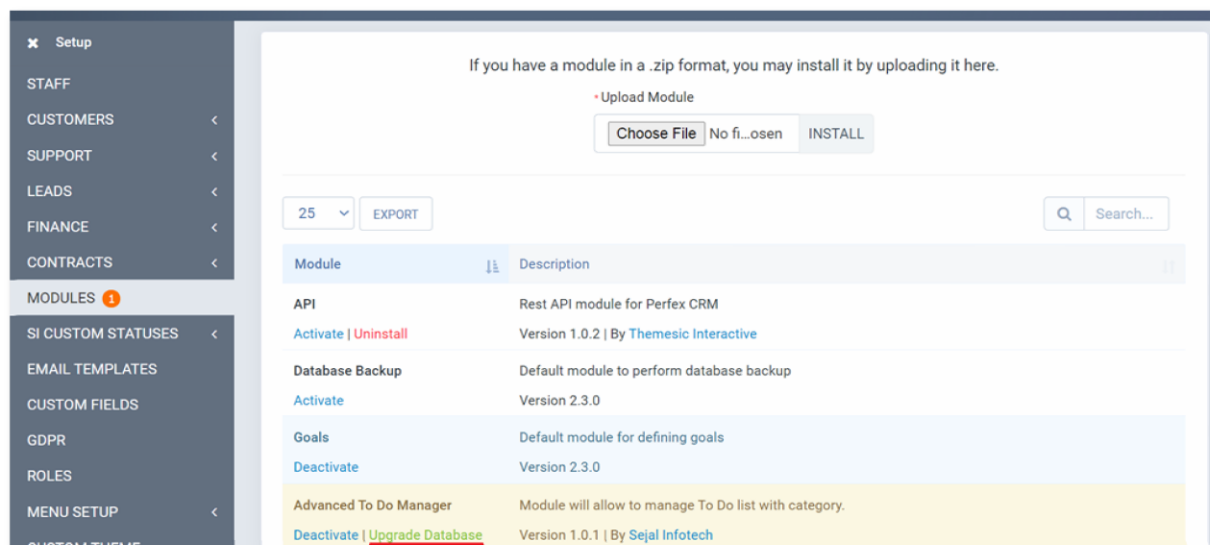
You will be able to see '**Advanced Todo Manager**' Module in list of Modules and Upgrade Database link. So Files are upgraded.

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\_todo 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 -> **Advanced Todo Manager**.



Click on that Link and Database will be Upgraded.

That's it....