

"Document Management module for PERFEX CRM"

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Thank you for choosing the Document Management module for Perfex CRM. If you have any questions that are beyond the scope of this help file, please feel free to email us via the support item on Codecanyon.

A) Upload & activate the module

* Prior to starting the installation, please make sure that no `open_basedir` restriction is applied to your PHP configuration and that `shell_exec` is enabled. Whereas 95% of the hosting providers around got a proper config that includes the above guides, you may need to adjust your PHP configuration settings if your provider offers these settings disabled by default.

- Steps of Installation:

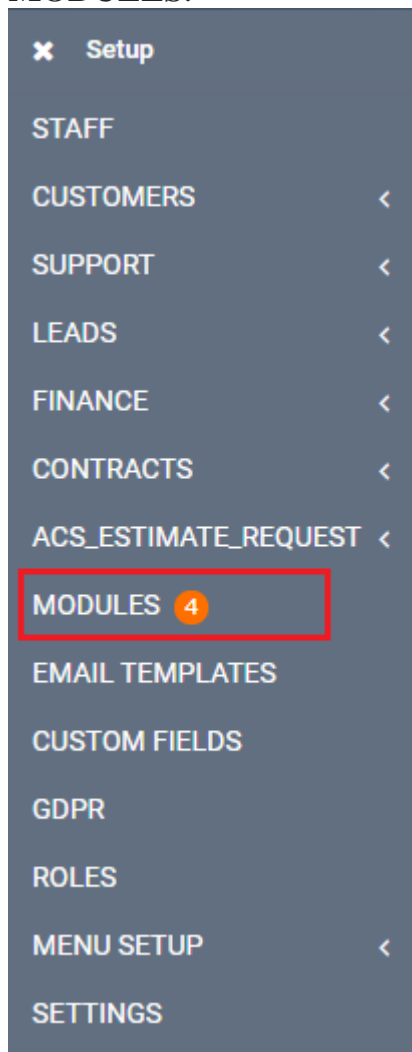
1. Extract your downloaded file content. You will notice a folder called **"documentation"** and a new zip file called **"upload.zip"**. Since the **"documentation"** folder contains documentation files and helpful instructions that are not needed in your module's installation, we will focus on the **"upload.zip"** file.

Name	Size	Packed	Type	Modified	CRC32
..			File folder		
documentation			File folder	09-May-20 7:2...	
upload.zip	89,929	83,101	WinRAR ZIP archive	09-May-20 8:0...	0F3E5E9E

2. **"upload.zip"** contains the module files (in a module format) that you upload in Perfex CRM's modules installation section.

Name	Size	Packed	Type	Modifi
..			File folder	
documentation			File folder	09-Mi
upload.zip	89,929	83,101	WinRAR ZIP archive	09-M

- Go to your Perfex CRM's Admin area and select the following menu item: **SETUP > MODULES**.



- Select the extracted **upload.zip** at the Module installation selection prompt and press **INSTALL**.

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

- Find the newly installed module and press **ACTIVATE**.

Document Management	This module helps you manage files and folders in the cloud easily, you can upload files, manage documents, edit documents online, approve & sign documents, OCR,....
Activate Uninstall	Version 1.0.0 By GreenTech Solutions

- You will be told that the module is successfully activated.
- If the version you have downloaded is larger than the current version, please click **UPGRADE DATABASE** (if available)

Deactivate | Upgrade Database

8. That's it! You are now ready to start using the module.

B) How to use the Document Management module

Please refer to the Knowledge Base Center:

<https://helpcenter.gtssolution.vn/category/document-management-module-for-perfex-crm>