

Greetings Manager Module for Perfex CRM

Author : Sejal Infotech

Description:

Greetings Manager allows admin or staff to send greeting SMS or Email to Client's contact or staff 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 or Email to the Clients or Staff on their special days like Birthday, Anniversary etc.

Thus, Best wishes will be sent to the Clients or Staffs from the company on their special Days.

Staff will be required to set a schedule for one time only, to send automatic greetings SMS/Email for every upcoming special day of Clients or other Staffs.

This module will use Custom fields of Contacts and Staff to send greetings. So that custom field should be Date type.

This module uses default SMS gateway activated in Perfex crm.

This module uses default Email settings 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 set Scheduled SMS.

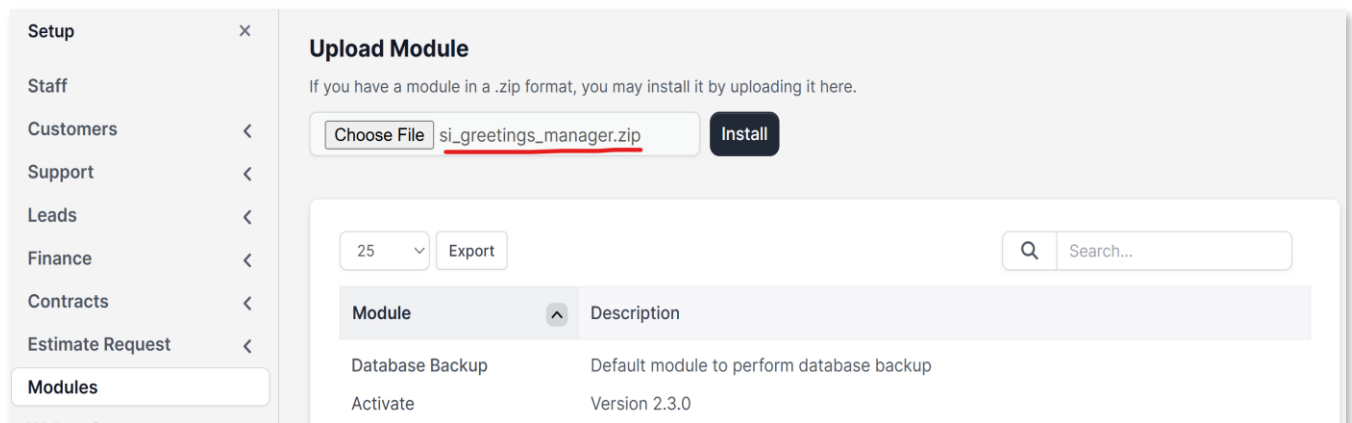
Steps to Use:

1. Quick Install:

You will get si_greetings_manager.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 'SI Greetings 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.

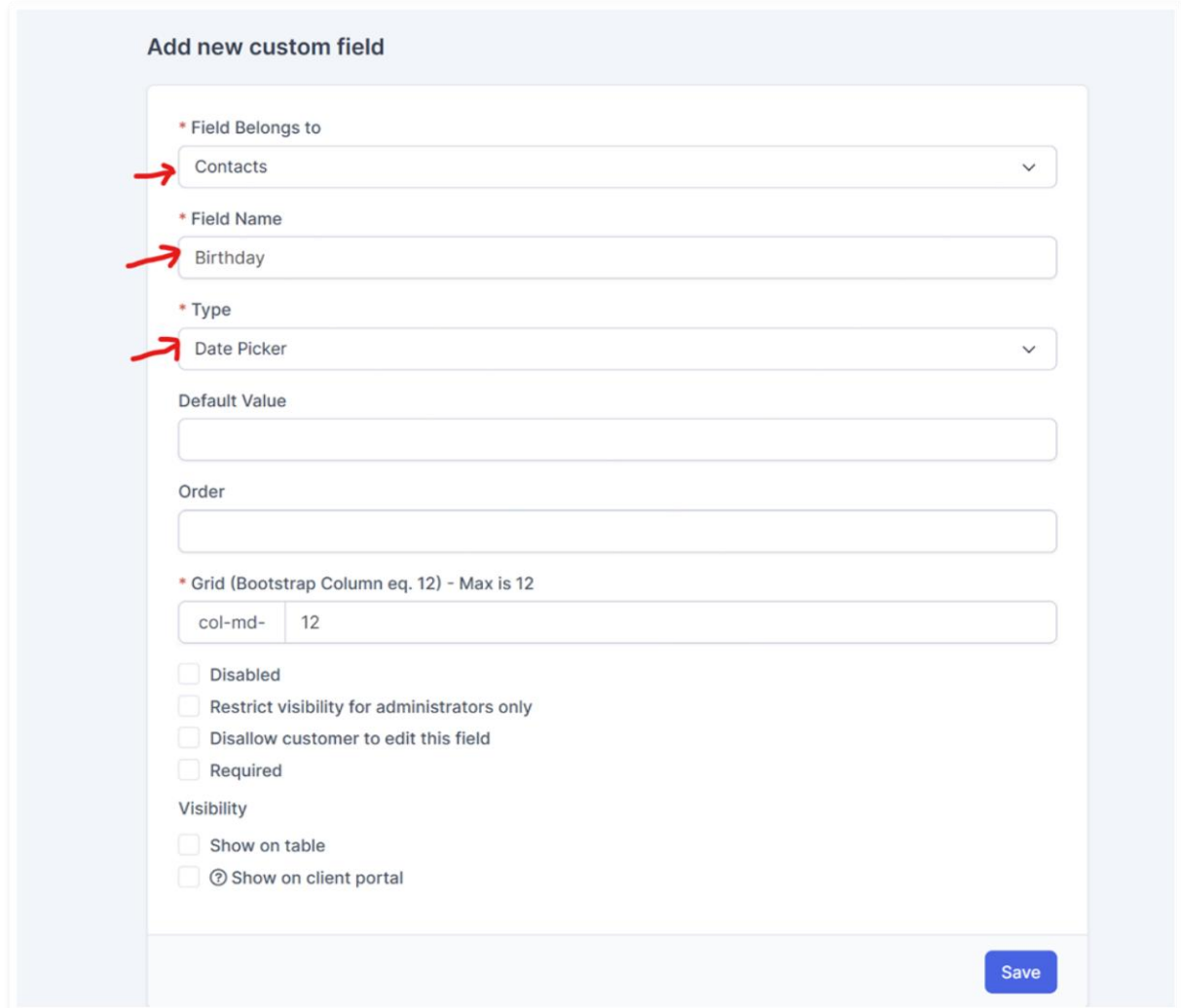
That's it.

2. Create Custom Fields for Greetings

Admin will be required to create custom fields for Contacts or Staffs, if it is not already created, like Birthday, Anniversary etc.

The custom field should be of Type Date.

Click on **Setup Menu -> Custom Fields**



The screenshot shows a web form titled "Add new custom field". It contains several input fields and checkboxes. Three red arrows point to specific fields: the first arrow points to the "Field Belongs to" dropdown menu which has "Contacts" selected; the second arrow points to the "Field Name" text input field which contains "Birthday"; the third arrow points to the "Type" dropdown menu which has "Date Picker" selected. Below these are fields for "Default Value", "Order", and "Grid (Bootstrap Column eq. 12) - Max is 12" (with "col-md-" and "12" selected). At the bottom are four checkboxes: "Disabled", "Restrict visibility for administrators only", "Disallow customer to edit this field", and "Required". Below these are two more checkboxes under the heading "Visibility": "Show on table" and "Show on client portal". A blue "Save" button is located at the bottom right of the form.

Add new custom field

* Field Belongs to
Contacts

* Field Name
Birthday

* Type
Date Picker

Default Value

Order

* Grid (Bootstrap Column eq. 12) - Max is 12
col-md- 12

☐ Disabled
☐ Restrict visibility for administrators only
☐ Disallow customer to edit this field
☐ Required

Visibility
☐ Show on table
☐ ? Show on client portal

Save

3. Set Custom field values for Contacts or Staff

Admin or Staff will required to set dates in the custom fields that is created for Contacts or Staff.

Click on **Main Menu -> Customers -> View Contact**

Fill up the details of Contacts like Birthday, Anniversary etc that you have created.

The screenshot shows a web application interface for managing contacts. On the left is a sidebar menu with options: Profile, Contacts, Notes, Client Matrix, SMS, Statement, Invoices, Payments, Proposals, Credit Notes, Estimates, Subscriptions, Expenses (highlighted with a red arrow), Contracts, Projects, and Tasks. The main area displays the 'Contact 1' form. The form has a header 'Contact 1 abc' and a close button. Below the header are several input fields: 'Profile image' with a 'Choose File' button, 'First Name' (Contact), 'Last Name' (1), 'Position' (halo), 'Email' (demo@demo.com), 'Phone' (+91), and 'Direction' (System Default). There are also checkboxes for 'Birthday' (checked, with date 19-07-2000) and 'Anniversary' (checked, with an empty date field). A 'Password' field is at the bottom. On the right side of the form, there are buttons for 'Phone', 'Active' (a toggle switch), and 'Previous'.

Once you set the required Values, you are ready to create schedule for sending greetings.

4. Create schedule for "Greetings"

Staff will see this module in Main Menu called "Greetings". All staffs should have permission to access this module.

Click on **Main Menu -> Greetings -> Manage**

Staff who has rights to access, will be able to set schedule for sending SMS or Email of greetings according to custom field selected to Client Contacts or Staff.

Admin and Staff can see List of Scheduled SMS/Email and Edit the scheduled.

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

Set scheduled day before which automatic SMS or Email will be sent to the Contacts or Staff, if Contact of Staff has set Date in the custom field.

Set **Auto Send greetings before(days)** to 0 (zero) if you want to send greetings on the same day or you can set it to 1/2/3 etc to send greetings before the day.

This schedule will run every day at scheduled Hour and check for any dates match the criteria to send the greetings.

This module uses default SMS gateway activated in Perfex crm to send Greetings SMS.

This module uses default Email settings activated in Perfex crm to send Greetings Email.

Note : Set Cron Jobs in Server for Perfex CRM to send automatic SMS/Email.

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

Click on **Main Menu -> Greetings -> Manage**, to add/ update/ delete schedules for Greetings SMS / Email.

Demo Greetings User

demo_greetings@gm...

Dashboard

Customers

Sales

Subscriptions

Expenses

Greetings

Manage

Logs

Contracts

Projects

Tasks

List of Schedule for Greetings

Add Greetings Schedule

25Export

Search...

| # | Greetings Name | Custom field | Send to | SMS Text | SMS | Email | Days | Schedule Hour | Created by | Created at | Last Executed |
|---|-----------------|--------------|----------|---|-----|-------|--------|---------------|------------|---------------------|---------------------|
| 2 | Client Birthday | Birthday | Contacts | Happy Birthday {contact_firstname} {contact_lastname} | ✓ | ✓ | 1 Days | 12 PM | | 18-07-2024 11:40 AM | 17-06-2025 12:04 PM |
| 4 | Staff Birthday | Birthday | Staff | xzzxc | ✓ | ✓ | 1 Days | 12 PM | | 18-07-2024 6:48 PM | 17-06-2025 12:04 PM |
| 5 | Cumpleaños | Birthday | Contacts | Feliz cumpleaños {contact_firstname}, {contact_phonenumber} | ✓ | ✓ | 0 Days | 12 PM | | 26-08-2024 5:18 AM | 17-06-2025 12:04 PM |

View Schedule and how many Contacts are sent the greeting SMS.

Greetings - Manage

×

Greetings Name :

Client Birthday

Custom field :

Birthday

Send to :

Contacts

SMS Text :

Happy Birthday {contact_firstname} {contact_lastname}

Email Subject :

Happy Birthday {contact_firstname} {contact_lastname}

Email Template :

Many many happy returns of the day {contact_firstname} {contact_lastname}

Auto send greetings before (days) :

1 Days

Schedule Hour :

12 PM

Created at :

18-07-2024 11:40 AM

Created by :

Last Executed :

18-07-2024 12:03 PM

Executed successfully for following Contacts

| # | Name | SMS | Email | Comment | Date |
|----|------------|-----|-------|----------------------------|---------------------|
| 29 | CContact 1 | ✗ | ✓ | For Birthday on 19-07-2024 | 18-07-2024 12:03 PM |
| 30 | Contact 2 | ✗ | ✓ | For Birthday on 19-07-2024 | 18-07-2024 12:03 PM |

-> Edit Greetings Schedule

In Edit, **send to** is disabled. All the other fields can be edited.

Greetings - Manage

Greetings Name

Client Birthday

Send to

☒ Customer Contacts ☐ Staff Members

Custom field

Birthday

Auto send greetings before (days)

1

Schedule Hour

12

Send ☒ SMS ☒ Email

SMS Text


Happy Birthday {contact_firstname} {contact_lastname}

Email Subject

Happy Birthday {contact_firstname} {contact_lastname}

Email Template

File Edit View Insert Format Tools Table

System Font 12pt **A**  ...

Many many happy returns of the day {contact_firstname}

5. View Logs for sent Greetings

Staff can view logs of how many contacts or Staff are sent greetings at which time.

Click on **Main Menu -> Greetings -> Logs**

| Name | Greetings Name | Sent to | SMS | Email | Comment | Date |
|-----------------------|-----------------|----------|-----|-------|----------------------------|---------------------|
| halo hel | Client Birthday | Contacts | ✗ | ✓ | For Birthday on 19-07-2024 | 18-07-2024 12:03 PM |
| abutaleb Saudi Arabia | Client Birthday | Contacts | ✗ | ✓ | For Birthday on 19-07-2024 | 18-07-2024 12:03 PM |

6. Settings for this module

Go to **SETUP -> Settings -> Greetings Settings** to add settings related to this module.

You can Enable to show scheduled Greetings on the Perfex Calendar.

You can clear the Sent SMS/Emails logs after set days.

Settings

- General
- Staff REST API
- Company Information
- Localization
- Email
- Finance
- Subscriptions
- Payment Gateways
- Greetings Settings**
- Customers
- Tasks

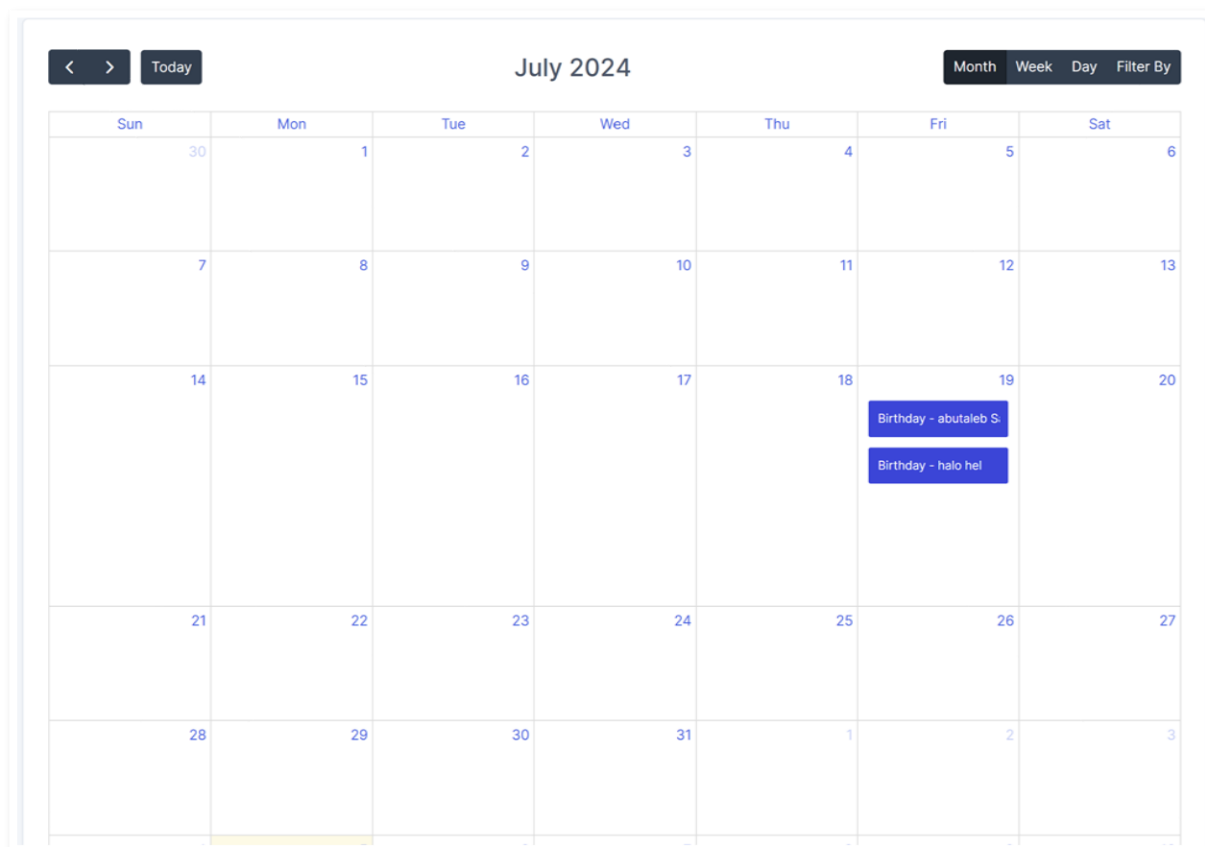
Greetings Settings

Settings for Greetings

Show Greetings on Calendar
☒ Yes ☐ No

Clear SMS/Email executed Log after days

If you have enabled **show Greetings on Calendar**, then it will display on Utility -> Calendar and Calendar on Dashboard.



7. How to Remove this Module

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

8. 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_greetings_manager -> 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_greetings_manager_lang.php`
4. There is text written in english like,

```
$lang['si_greetings_manager_menu'] = 'Greetings';  
$lang['si_greetings_manager_schedule_submenu'] = 'Manage';  
.....
```

you can change text here from '**Manage Schedule**' to your text at right hand side.

So it will be like this

```
$lang['si_greetings_manager_menu'] = 'Your Text';  
$lang['si_greetings_manager_schedule_submenu'] = '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...