

Advanced To Do Manager Module for Perfex CRM

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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.

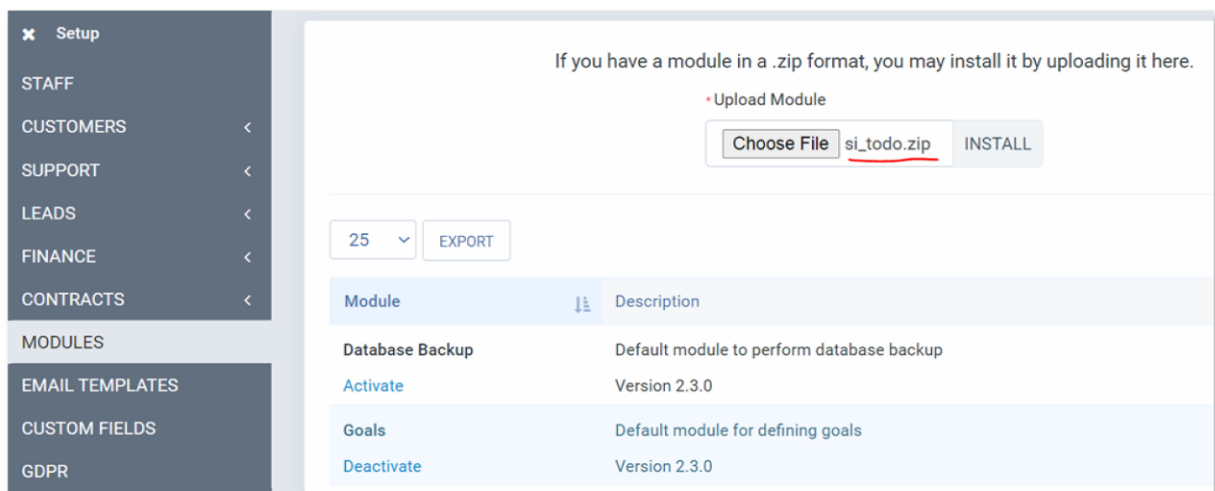
Steps to Use:

1. Quick Install:

You will get si_todo.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 '**Advanced To do Manager**' Module in list of Modules.

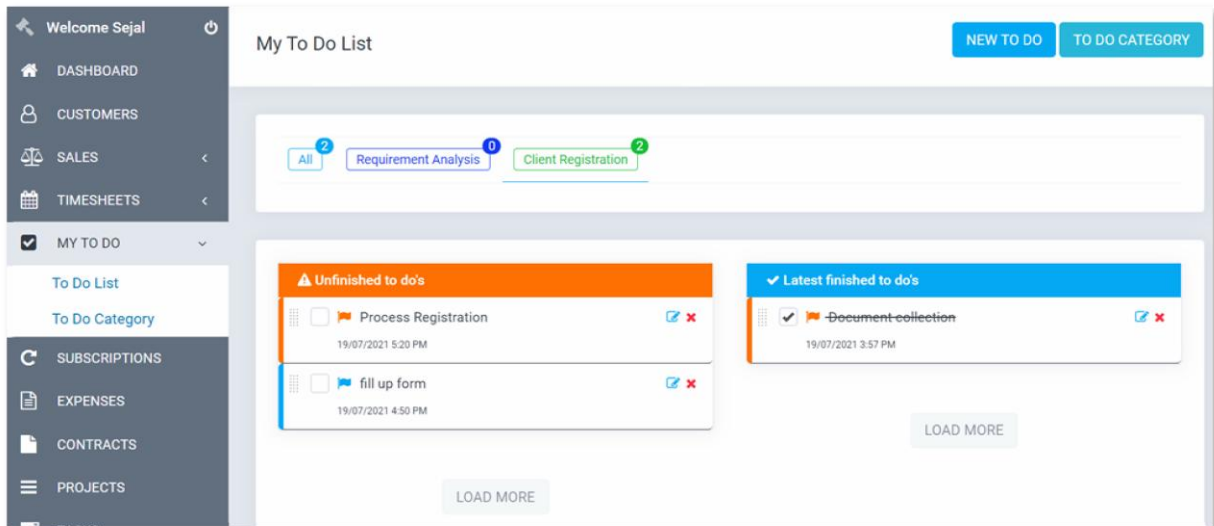
Click on Activate it.

That's it.

2. Use from Main Menu "My To do"

User will be see this module in Main Menu called "My To do". All users have permission to access this module.

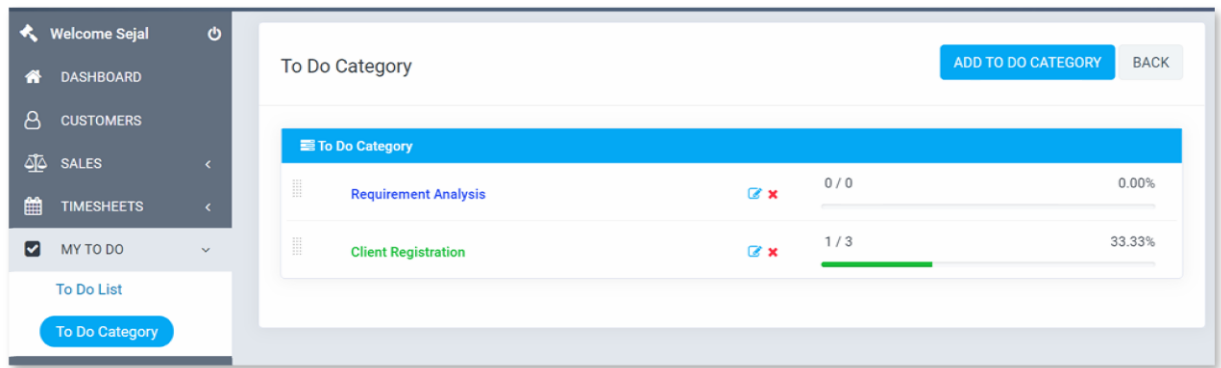
- A) Click on **Main Menu->My To do->To Do List**, to add/ update/ delete to do with category and priority. Also that page will show all categorised to dos, so user can easily manage them.



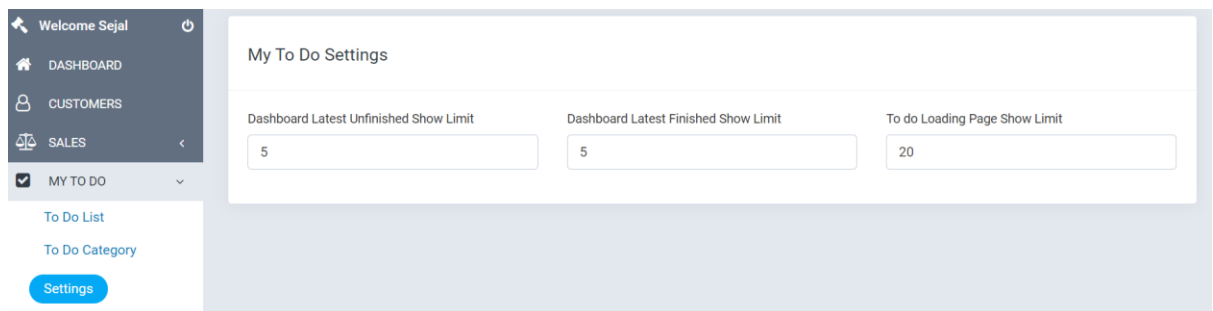
Add new To do

The screenshot shows a modal window titled 'Add New Todo'. The modal has a blue header bar with the title and a close button (X). The main content area is white and contains three sections. The first section is 'Description' with a text input field containing 'Process Registration'. The second section is 'To Do Category' with a dropdown menu showing 'Client Registration' and a plus icon to add more categories. The third section is 'Priority' with four radio button options: 'Low', 'Medium', 'High' (which is selected), and 'Urgent'. At the bottom right of the modal are two buttons: 'CLOSE' and 'SAVE'.

- B)** Click on **Main Menu->My To do->To do Category**, to add/ update/ delete categories for To do. Here you can see how many to dos are pending for that category.



- C)** Click on **Main Menu->My To do->Settings**, to customize your settings for To do showing Limit on Dashboard and on Loading page.



3. How to Remove this Module

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

4. 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_todo -> language" then copyfolder 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_todo_lang.php
4. There is text written in english like,

```
$lang['si_todo_main_menu'] = 'My To Do';  
$lang['si_todo_category_menu'] = 'To Do Category';  
.....
```

you can change text here from '**My To Do**' to your text at right hand side.

So it will be like this

```
$lang['si_todo_main_menu'] = 'Your Text';  
$lang['si_todo_category_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...