

Lead Follow up Scheduler Module for Perfex CRM

Author : Sejal Infotech

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.

This module uses default SMS gateway 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.

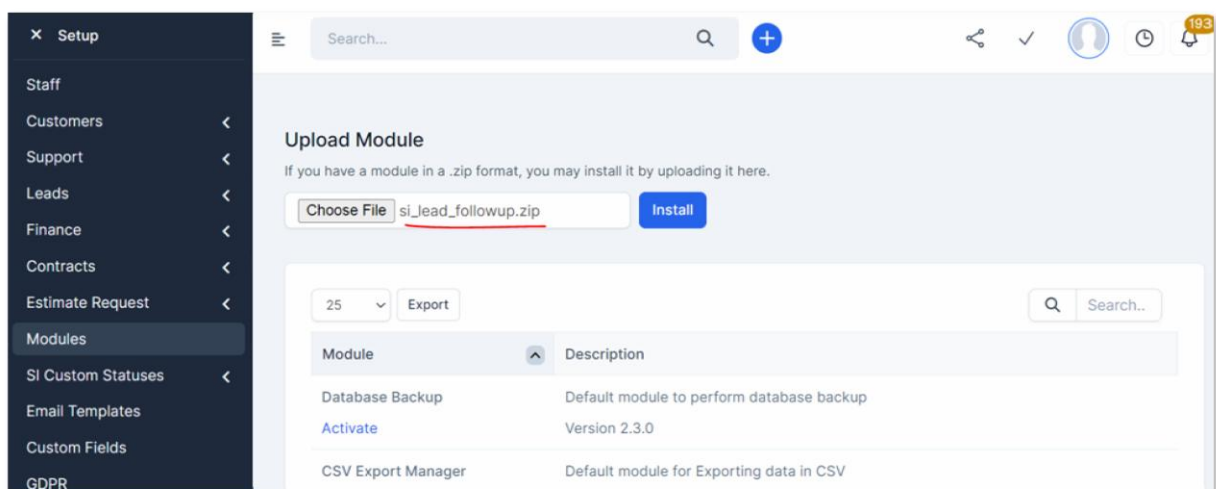
Steps to Use:

1. Quick Install:

You will get si_lead_followup.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 '**Lead Follow up Scheduler**' 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->

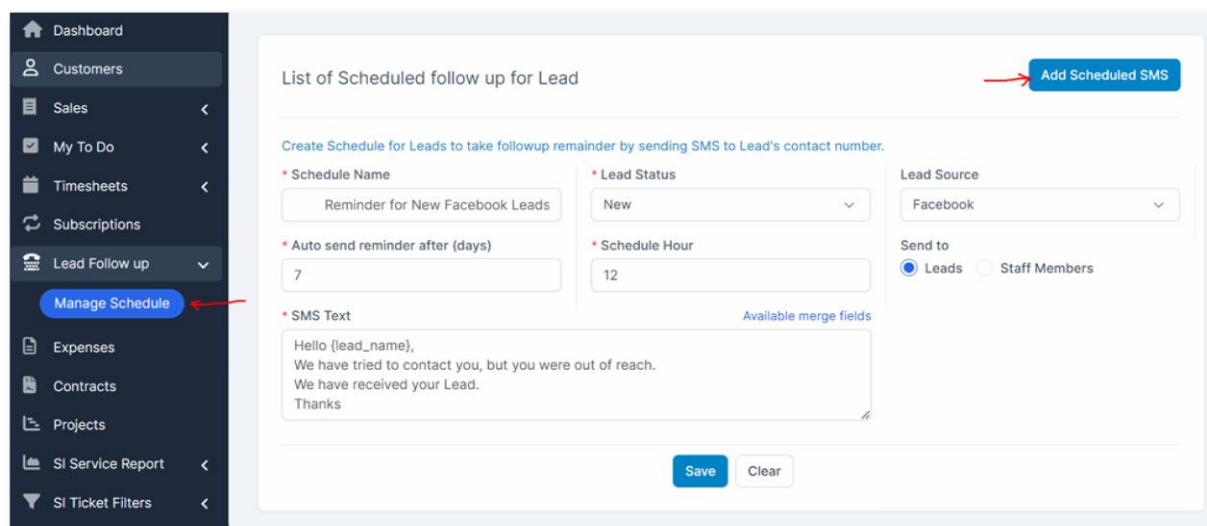
Validate your Purchase, by entering purchase code.

That's it.

2. Use from Main Menu "Lead Follow up"

Staff will be see this module in Main Menu called "Lead Follow up". All staffs have permission to access this module.

Click on **Main Menu -> Lead Follow up -> Manage Schedule**



The screenshot shows the 'Manage Schedule' interface within the 'Lead Follow up' module. On the left is a dark sidebar menu with options: Dashboard, Customers, Sales, My To Do, Timesheets, Subscriptions, Lead Follow up (expanded), Expenses, Contracts, Projects, SI Service Report, and SI Ticket Filters. The 'Manage Schedule' option is highlighted with a red arrow. The main content area is titled 'List of Scheduled follow up for Lead' and features an 'Add Scheduled SMS' button with a red arrow pointing to it. Below the title is a description: 'Create Schedule for Leads to take followup reminder by sending SMS to Lead's contact number.' The form contains several fields: 'Schedule Name' (text input with 'Reminder for New Facebook Leads'), 'Lead Status' (dropdown menu with 'New' selected), 'Lead Source' (dropdown menu with 'Facebook' selected), 'Auto send reminder after (days)' (text input with '7'), 'Schedule Hour' (text input with '12'), and 'SMS Text' (text area with a sample message: 'Hello {lead_name}, We have tried to contact you, but you were out of reach. We have received your Lead. Thanks'). There are also radio buttons for 'Send to' (Leads selected, Staff Members unselected). At the bottom right are 'Save' and 'Clear' buttons. A link for 'Available merge fields' is also present.

Staff member who have rights to access, will be able to set schedule SMS to all leads according to Lead status and source type.

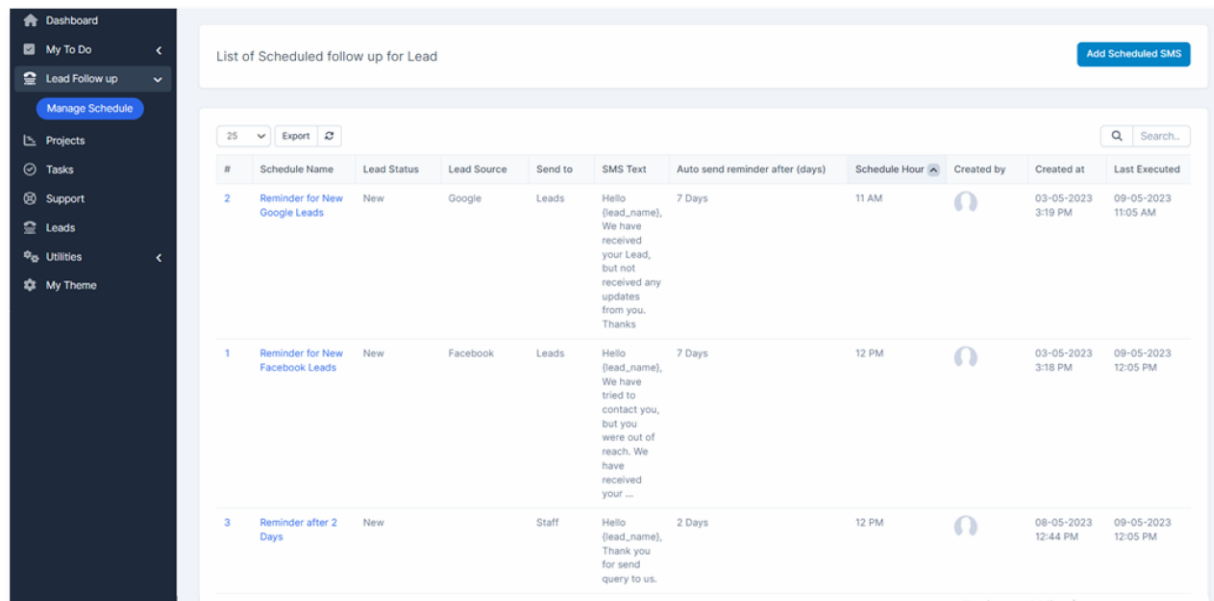
Admin and Staff can see List of Scheduled SMS and Edit the scheduled.

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

Note : Admin will required to set Cron Jobs in Server for Perfex CRM.

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

-> Click on **Main Menu -> Lead Follow up -> Manage Schedule**, to add/ update/ delete schedules for Lead follow up SMS.



The screenshot displays the 'Manage Schedule' page within a CRM system. On the left is a dark sidebar with navigation options: Dashboard, My To Do, Lead Follow up (selected), Projects, Tasks, Support, Leads, Utilities, and My Theme. The 'Manage Schedule' option is highlighted under 'Lead Follow up'. The main content area is titled 'List of Scheduled follow up for Lead' and includes an 'Add Scheduled SMS' button. Below the title is a table with columns: #, Schedule Name, Lead Status, Lead Source, Send to, SMS Text, Auto send reminder after (days), Schedule Hour, Created by, Created at, and Last Executed. The table contains three entries:

#	Schedule Name	Lead Status	Lead Source	Send to	SMS Text	Auto send reminder after (days)	Schedule Hour	Created by	Created at	Last Executed
2	Reminder for New Google Leads	New	Google	Leads	Hello (lead_name), We have received your Lead, but not received any updates from you. Thanks	7 Days	11 AM		03-05-2023 3:19 PM	09-05-2023 11:05 AM
1	Reminder for New Facebook Leads	New	Facebook	Leads	Hello (lead_name), We have tried to contact you, but you were out of reach. We have received your ...	7 Days	12 PM		03-05-2023 3:18 PM	09-05-2023 12:05 PM
3	Reminder after 2 Days	New		Staff	Hello (lead_name), Thank you for send query to us.	2 Days	12 PM		08-05-2023 12:44 PM	09-05-2023 12:05 PM

Set scheduled day after which automatic SMS will be sent to the lead, if Lead has added phone number.

-> View Schedule and how many Leads are sent the follow up SMS.

Lead Follow up-Manage Schedule

Schedule Name :

Reminder after 2 Days

Lead Status :

New

Lead Source :

Send to :

Leads

SMS Text :

Hello {lead_name},
Thank you for send query to us.

Auto send
reminder after
(days) :

2 Days


Schedule Hour :

12 PM

Created at :

08-05-2023 12:44 PM

Created by :



Last Executed :

09-05-2023 12:05 PM

Executed successfully for following Leads

#	Name	Date
53	ABC Corporation	08-05-2023 12:48 PM

Close

-> Edit Lead Schedule

but not

Lead Follow up-Manage Schedule

Schedule Name
Reminder after 2 Days

Lead Status
New

Lead Source
Nothing selected

Auto send reminder after (days)
2

Schedule Hour
12

Send to
☒ Leads ☐ Staff Members

SMS Text
Hello {lead_name},
Thank you for send query to us.

Available merge fields

Save Close

Showing 1 to 4 of 4 entries

3. How to Remove this Module

If you want to remove this module, then Go to **SETUP -> Modules -> Lead Follow up Scheduler** 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_lead_followup-> 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_sms_lang.php

4. There is text written in english like,

```
$lang['si_lead_followup_menu'] = 'Lead Follow up';  
$lang['si_lead_followup_schedule_send_submenu'] = 'Manage Schedule';  
.....
```

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

So it will be like this

```
$lang['si_lead_followup_menu'] = 'Your Text';  
$lang['si_lead_followup_schedule_send_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...