

Dynamic Customized Theme Module of Perfex CRM

Upgrade

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Description:

Dynamic Customized Theme allows you to set different ready and easy to use theme templates in Perfex CRM at both the sides, admin as well as Client.

You can easily customize existing Templates as per your choice.

You can create new Templates also.

You can set Background Images by using this templates.

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

Only allowed Staff members will be able to change theme templates.

Note: If you are installing first time, then Upgrade is not required. Upgrade is only required when you have already installed our module and there is new version updates available of module.

Steps to Upgrade:

Step 1. Upgrade Files:

You have two options to upgrade Module files.

Option 1:

You will get si_custom_theme.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.

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

25 EXPORT Search...

Module	Description
Database Backup	Default module to perform database backup
Activate	Version 2.3.0
Goals	Default module for defining goals
Deactivate	Version 2.3.0
Dynamic Customized Theme	Advanced Theme that will provide predefined templates and easy customization as per your choice.
Deactivate Settings Upgrade Database	Version 1.0.1 By Sejal Infotech

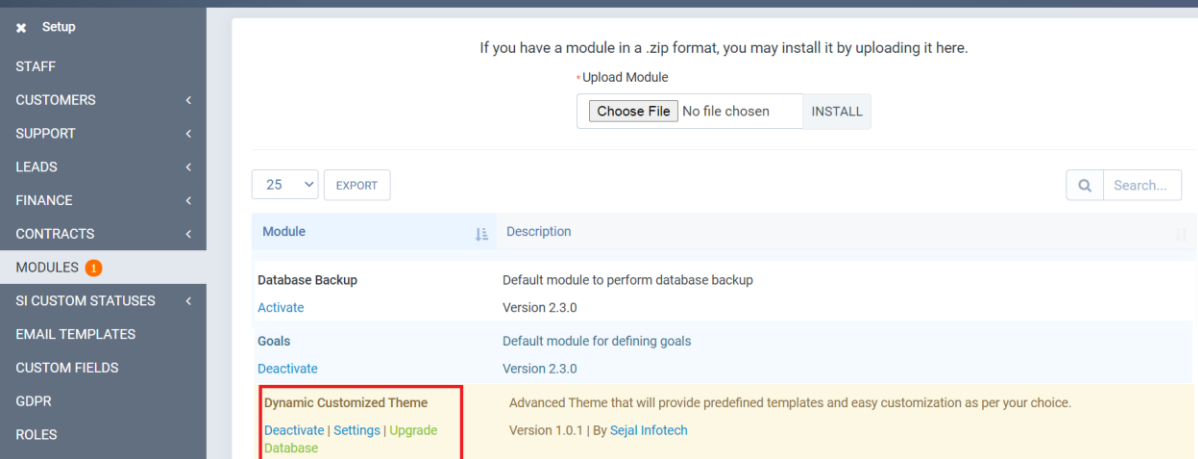
You will be able to see '**Dynamic Customized Theme**' Module in list of Modules and Upgrade Database link. So Files are upgraded.

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_custom_theme 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 -> **Dynamic Customized Theme**.



The screenshot shows the Perfex CRM interface. On the left is a sidebar menu with categories like Setup, STAFF, CUSTOMERS, SUPPORT, LEADS, FINANCE, CONTRACTS, MODULES (highlighted with an orange circle), SI CUSTOM STATUSES, EMAIL TEMPLATES, CUSTOM FIELDS, GDPR, and ROLES. The main content area displays a list of modules. At the top, there is an 'Upload Module' section with a 'Choose File' button and an 'INSTALL' button. Below this is a table of modules with columns for 'Module' and 'Description'. The 'Dynamic Customized Theme' module is highlighted in yellow and has a red box around its 'Deactivate | Settings | Upgrade Database' link.

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Click on that Link and Database will be Upgraded.

That's it....