

# Dynamic Customized Theme Module of Perfex CRM

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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.

All staff and clients will be able to select their theme templates(V-1.0.3).

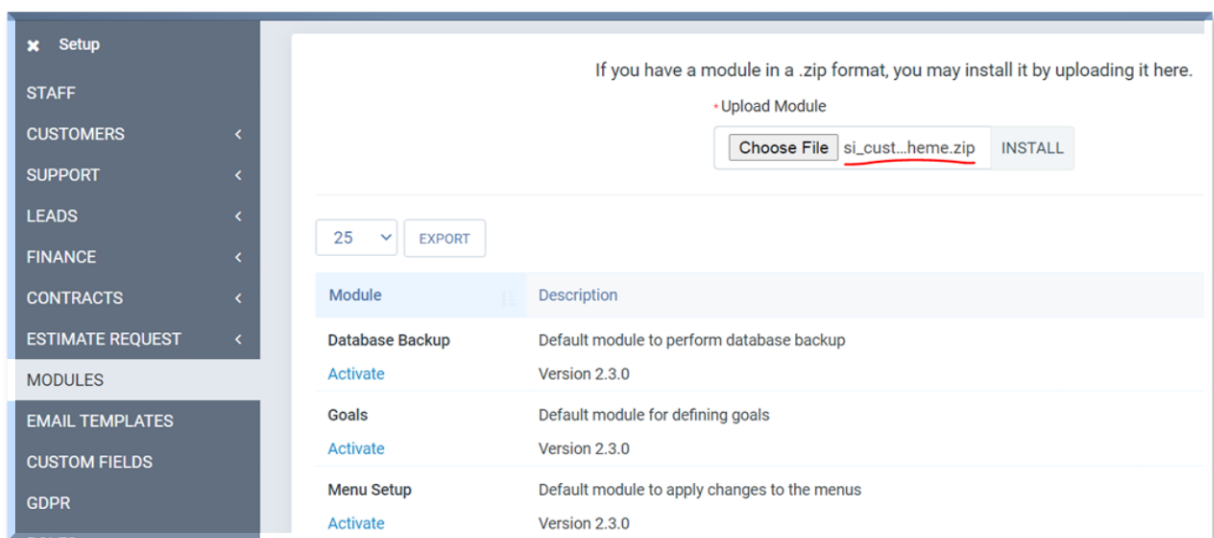
## Steps to Use:

### 1. Quick Install:

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.

Go to Perfex CRM -> **SETUP** -> **Modules**.

Upload Module zip file and click Install button.



You will be able to see '**Dynamic Customized Theme**' 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->

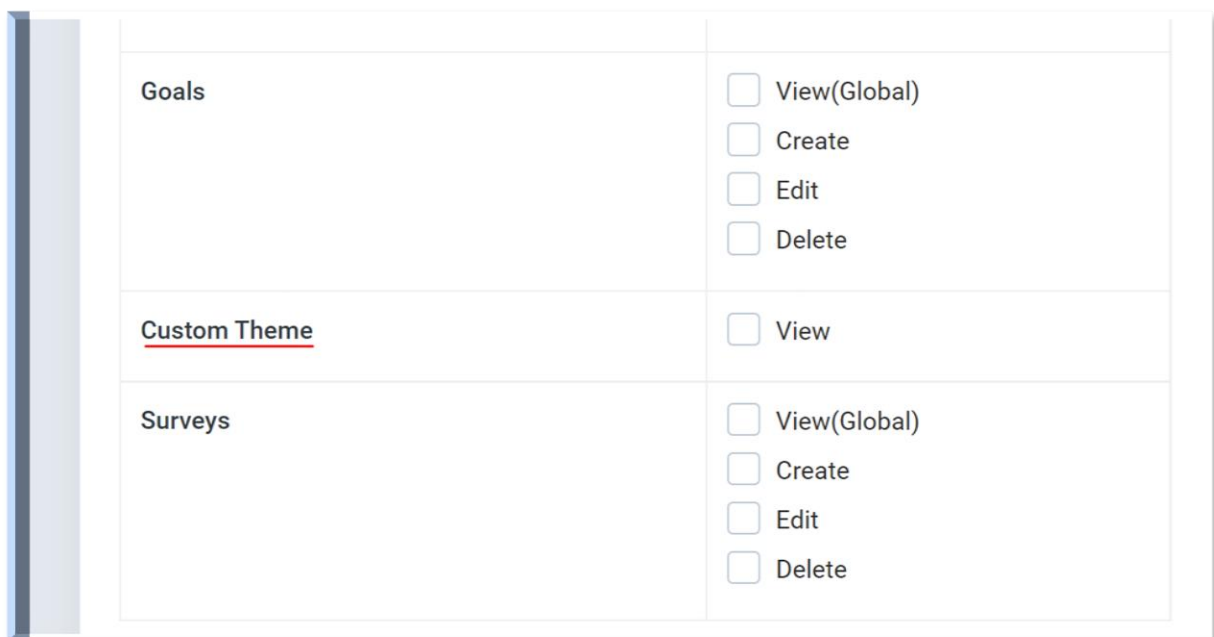
Validate your Purchase, by entering purchase code.

That's it.

## **2. Give rights to Users to access this Module**

Admin can give rights to Users or Role who want to allow to modify themes.

Click SETUP-> Roles->edit Role, and select "Custom Theme" for that role. So all users having that role will be able to use this module.



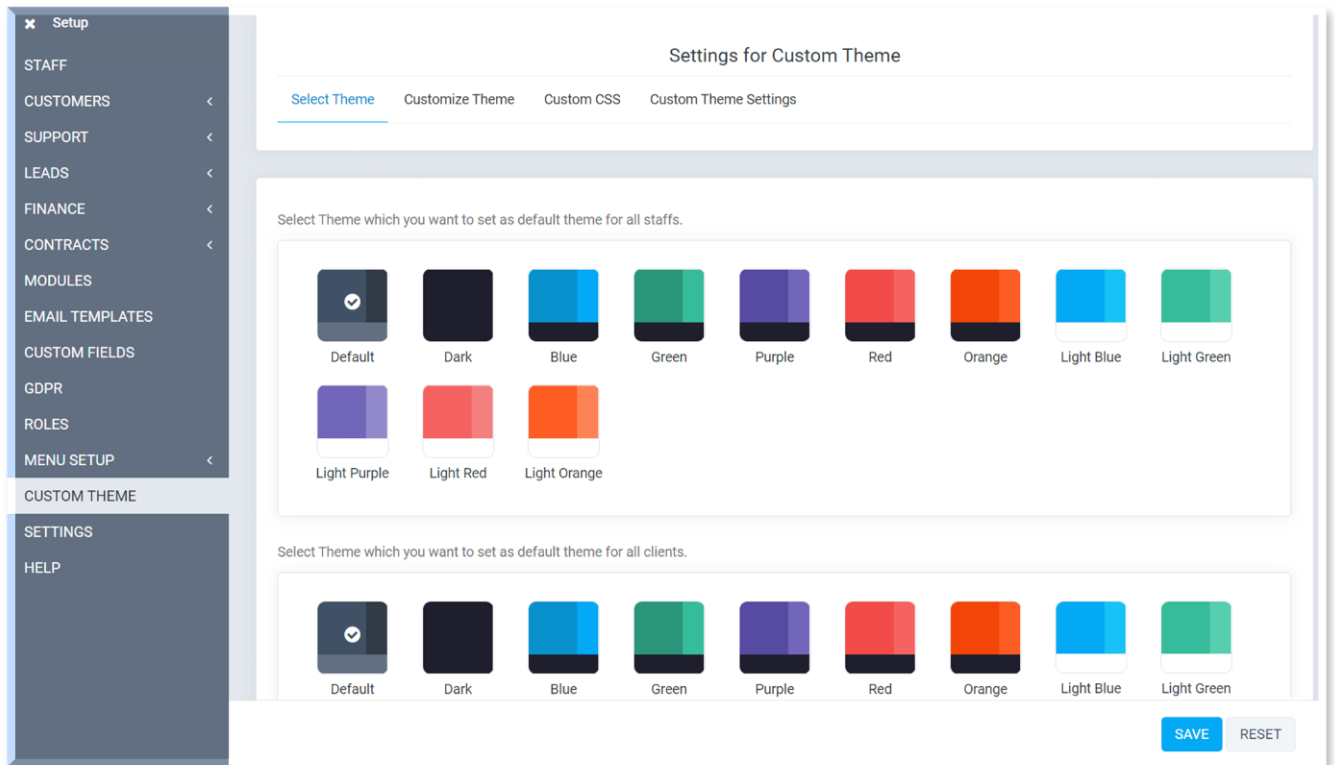
Goals	<input type="checkbox"/> View(Global) <input type="checkbox"/> Create <input type="checkbox"/> Edit <input type="checkbox"/> Delete
<u>Custom Theme</u>	<input type="checkbox"/> View
Surveys	<input type="checkbox"/> View(Global) <input type="checkbox"/> Create <input type="checkbox"/> Edit <input type="checkbox"/> Delete

Check Custom Theme View if want to allow staff to modify themes and save changes.

### 3. Use from Menu "Custom Theme"

User will see this module in Setup Menu called "Custom Theme", if that user has permission to access this module.

Click on **Setup Menu -> Custom Theme**, to apply different Themes at admin and client side.



You can select the theme of your choice from given Templates. We have provided preview theme as you select a theme, at admin side.

By Default, Default Perfex Theme is selected.

You can select two themes, one for Admin side, second for Client side.

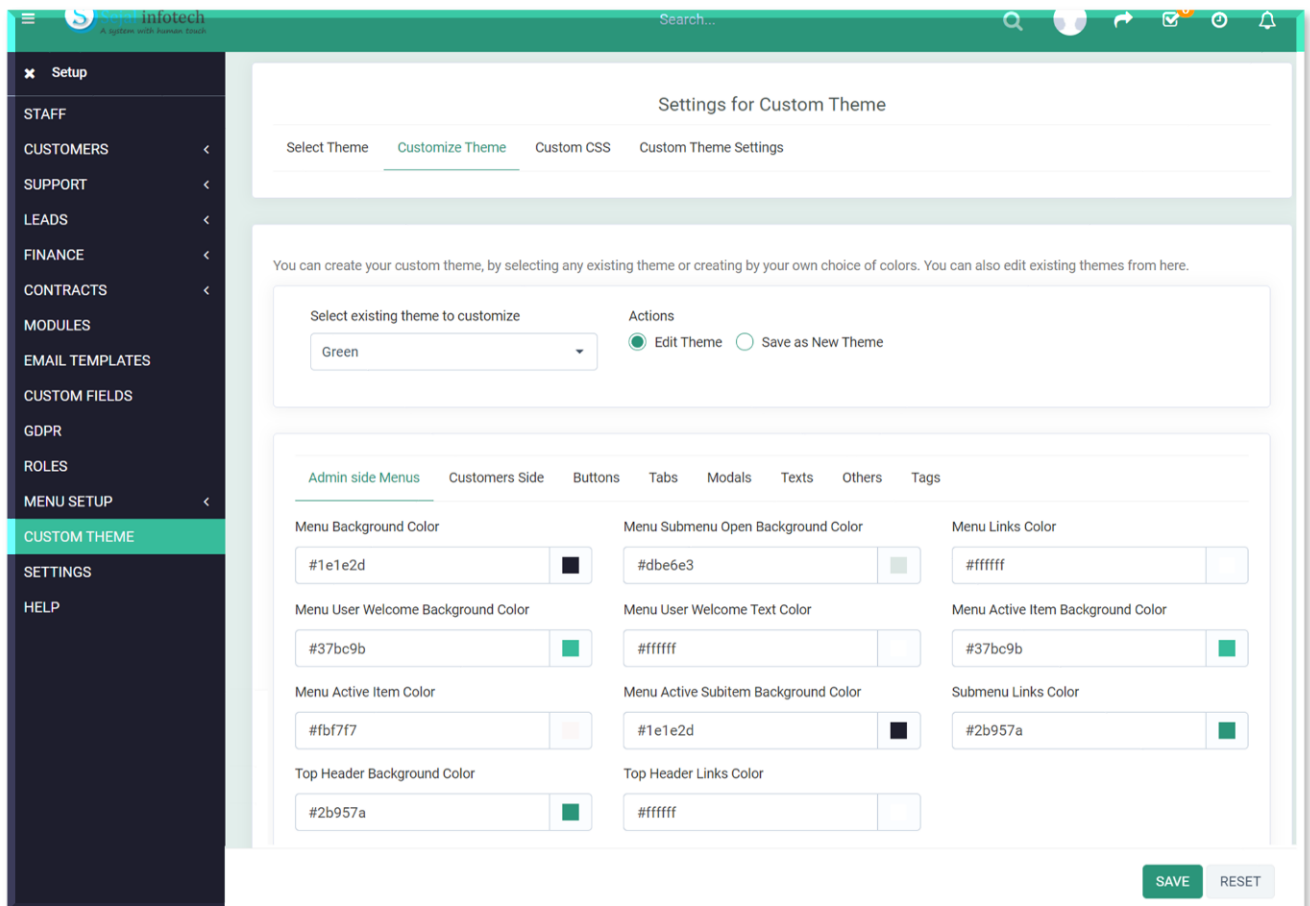
Select the theme and Save it to apply it for all pages.

You can customize the theme by clicking on Tab Customize Theme.

You can add Custom CSS, if you need.

You can add Background Images for different pages.

**Note: If you set Background Images, then do not set background Color for that. For Example, if you set Background Image for Admin Login Page, then do not set Admin Login Background Color Field from Theme Customizations, otherwise it may conflict.**



You can customize the theme by clicking on Tab **Customize Theme**. Here you can select an existing theme and **Edit** it or **Save as New Theme** after customization.

Leave the fields as blank, where you do not apply the style, so for that, default style will be applied.


**Reset Button** will reset all themes to default styles, as per provided by us. And all changes / customizations in themes will be reset.

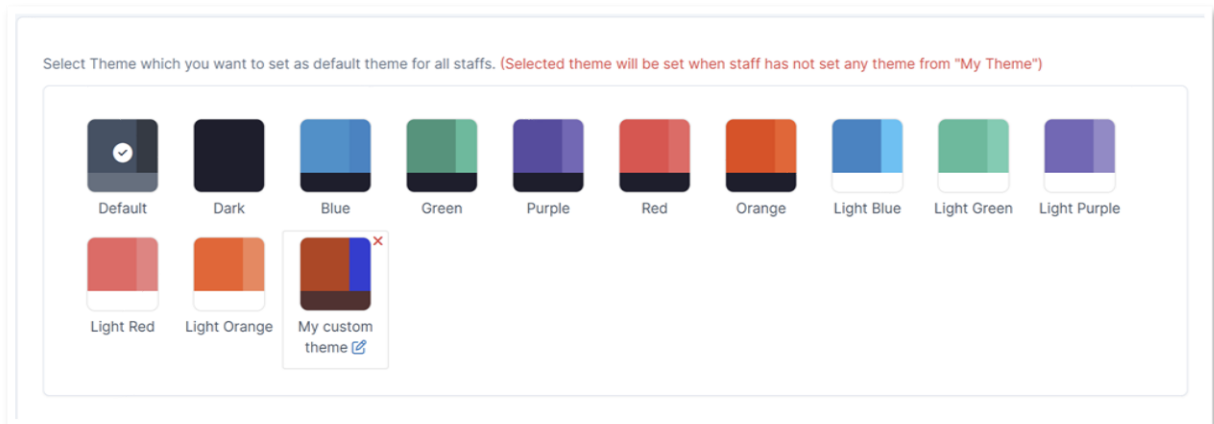
You can Hide / show Headers and footers at client side login from **Custom Theme Settings**.

You can enable / disable staffs and clients to set their preferred themes from their login.

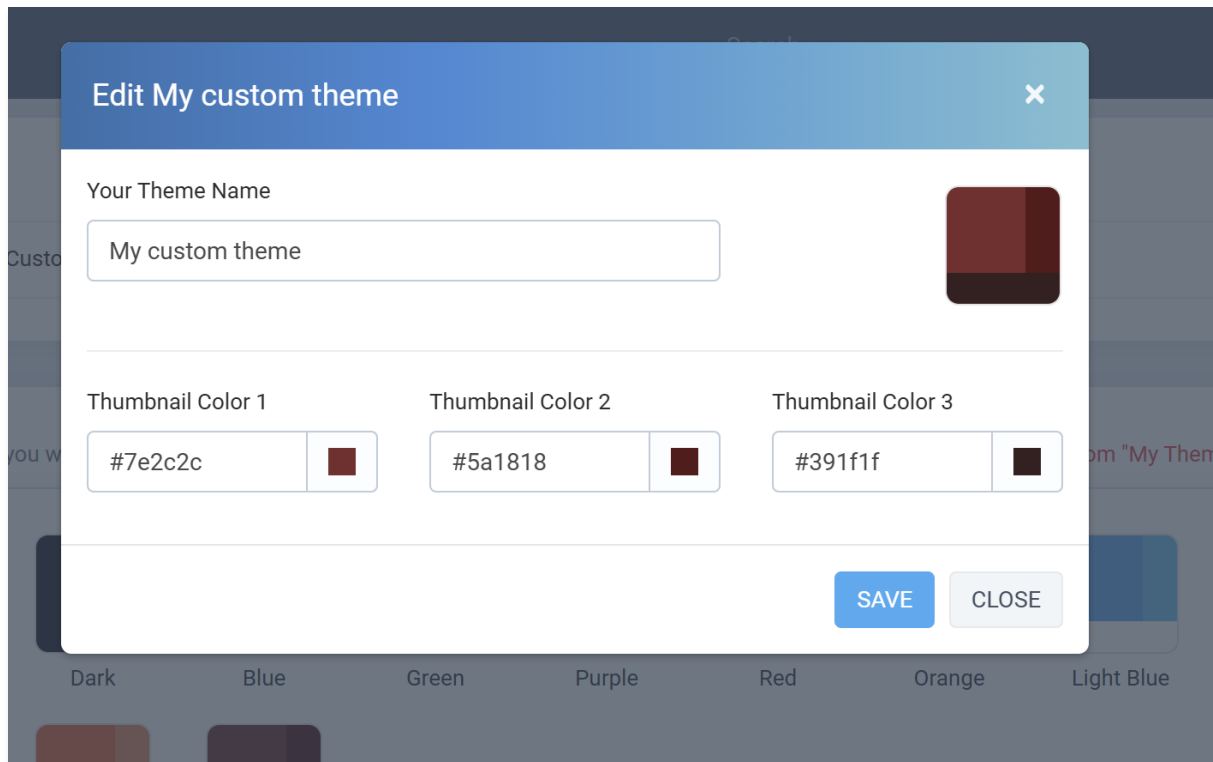
Only admin or allowed staffs can edit the themes. Other staff members will be able to select the theme from available list of themes.

#### **4. Edit custom Theme Name and Thumbnail (available from V - 1.1.3)**

You can edit the custom theme name that you have created. Go to Custom theme  icon.



You can edit **Theme name** and its **Thumbnail** colors from here.



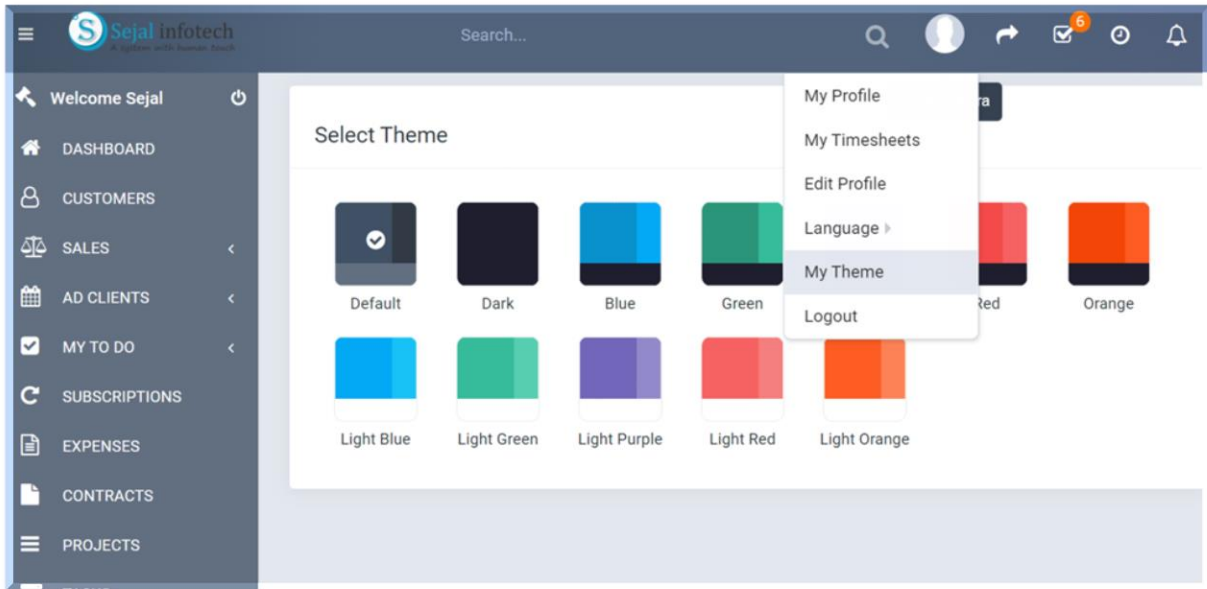
**Note:** You can edit Theme name and Thumbnails of the custom themes that you have created, not the default themes that come with this module.

### **5. Enable Staffs to select their Theme (available from V-1.0.3)**

Custom theme gives facility to all staff members to set their preferred theme from available list of themes. This means all staffs will have their own chosen themes.

You can enable/disable staff theme selection from "Custom Theme Settings".

Staff can choose his theme from Top Menu -> Profile Menu.

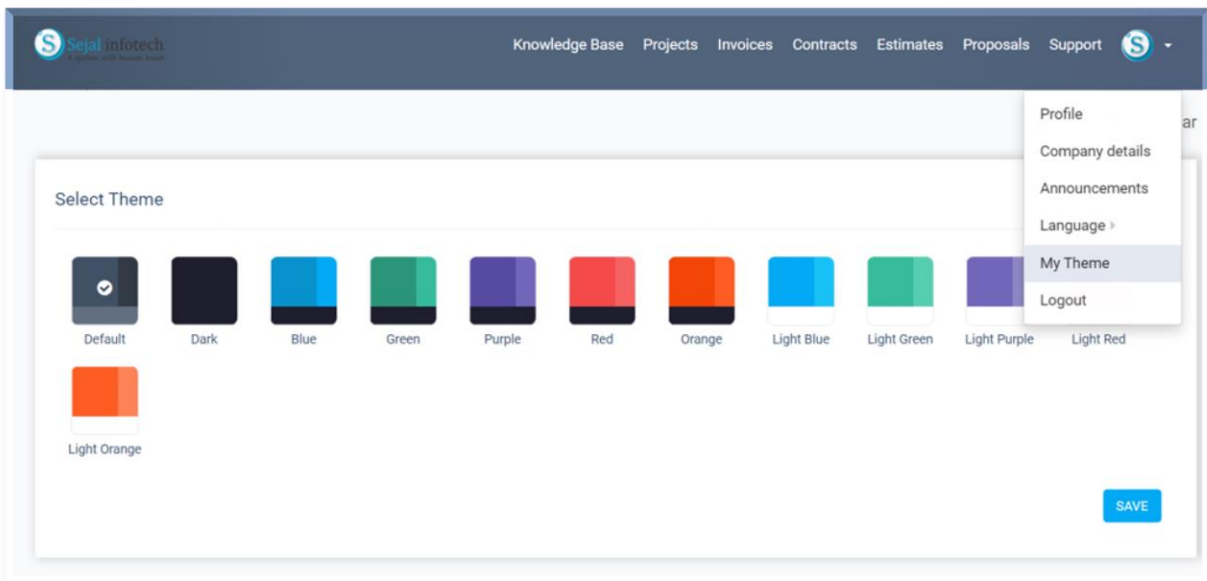


### **6. Enable Clients to select their Theme (available from V-1.0.3)**

Custom theme gives facility to all customers to set their preferred theme from available list of themes. This means all clients will have their own chosen themes.

You can enable/disable client theme selection from "Custom Theme Settings".

Client can choose his theme from Top Menu -> Profile Menu.



## 7. How to Remove this Module

If you want to remove this module, then Go to SETUP -> Modules -> **Dynamic Customized Theme** 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\_custom\_theme-> 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\_custom\_theme\_lang.php

4. There is text written in english like,

```
$lang['si_ct_select_theme'] = ' Select Theme';  
$lang[' si_custom_theme_title'] = ' Settings for Custom Theme';  
.....
```

you can change text here from **right side** to your text.

So it will be like this

```
$lang['si_ct_select_theme'] = 'Your Text';  
$lang[' si_custom_theme_title'] = '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...**