

# Custom Task Filters Module of Perfex CRM Upgrade

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## Description:

**SI Task Filters** allows you to create dynamic filters for Tasks in Perfex CRM, This can be used to generate different kind of reporting for your use.

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

You can create filters and save them, by your given name, as filter Templates, to use them in future.

This module saves time of user in generating different reports from Task filter because, Once filter is saved as Template, then that template can be used any time, in future.

Only allowed Staff members can use this Module.

## Steps to Upgrade:

### Step 1. Upgrade Files:

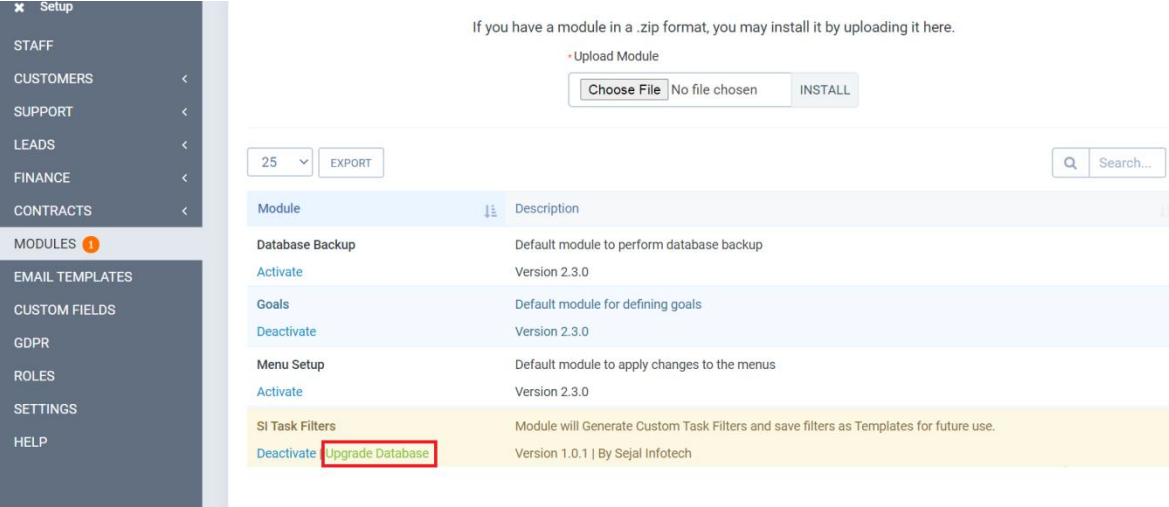
You have two options to upgrade Module files.

#### Option 1:

You will get si\_task\_filters.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

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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
Menu Setup	Default module to apply changes to the menus
Activate	Version 2.3.0
SI Task Filters	Module will Generate Custom Task Filters and save filters as Templates for future use.
Deactivate Upgrade Database	Version 1.0.1   By Sejal Infotech

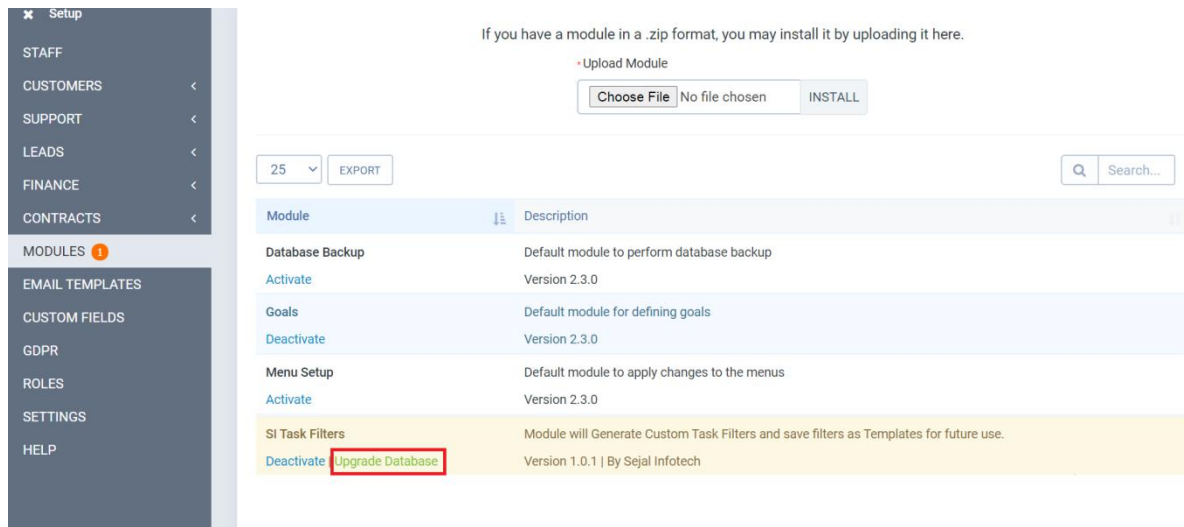
You will be able to see 'SI Task Filters' Module in list of Modules and Upgrade Database link. So Files are upgraded.

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\_task\_filters** 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->SI Task Filters.



The screenshot shows the Perfex CRM Setup interface. On the left is a sidebar menu with options: STAFF, CUSTOMERS, SUPPORT, LEADS, FINANCE, CONTRACTS, MODULES (highlighted with an orange circle), EMAIL TEMPLATES, CUSTOM FIELDS, GDPR, ROLES, SETTINGS, and HELP. The main content area is titled 'Setup' and contains an 'Upload Module' section with a 'Choose File' button and an 'INSTALL' button. Below this is a table of installed modules. The 'SI Task Filters' module is highlighted in yellow, and the 'Upgrade Database' link is highlighted with a red box.

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Click on that Link and Database will be Upgraded.

That's it....