

## Introduction

**Perfex CRM Chat** is module for **Perfex CRM**, the chat can be used between the staff members/administrators to and clients to send messages and upload files in real time with Pusher (**websockets**).

With the chat simple interface, you will be able to send messages to your fellow colleagues in no time and discuss additional project or work related stuff. Also from version 1.3.5 added the option to interact with clients also share files and collaborate.

You can also change the chat color to fit for your requirements and make it more personal and check immediately when a fellow colleague was seen/online directly on the chat interface with option for live real time notifications also for messages and online status.

## Requirements

- At least Perfex CRM version 2.3.2 - <https://codecanyon.net/item/perfex-powerful-open-source-crm/14013737/>
- **Pusher configured in Perfex CRM.**

**If you don't have account you can create here:**

[https://dashboard.pusher.com/accounts/sign\\_up](https://dashboard.pusher.com/accounts/sign_up)

## Installation

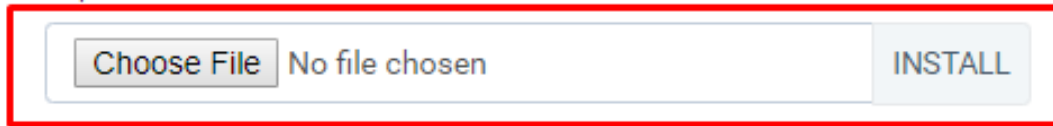
You can install Perfex CRM Employee chat in 2 different ways, find both methods below.

### **Installation Method 1**

- Login as administrator in Perfex CRM and navigate to **Setup->Modules**.
- At the section upload module, from the downloaded .zip file from CodeCanyon select the **prchat.zip** file and click Install.
- After the module is successfully uploaded/installed, you will **need to activate it by clicking on the activate link/button on the modules list table**.

If you have a module in a .zip format, you may install it by uploading it here.

\* Upload Module



## **Installation Method 2**

- In your Perfex CRM installation uploaded the contents of the **prchat.zip** in the **/modules** directory.
- Login as administrator in Perfex CRM and navigate to **Setup->Modules** and **activate it by clicking on the activate button.**

## **Setup**

After successfully installation and activation, you will need to make sure first that your **Pusher** options are configured properly as explained in the documentation here: <https://help.perfexcrm.com/setup-realtime-notifications-with-pusher-com/>

When ensuring that your Pusher configuration is configured, navigate to **Setup->Settings->Pusher** and enable Perfex CRM Employee chat by selecting the **Enable Pusher Chat** option to **Yes**.

Enable Pusher Chat

☒ Yes ☐ No

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**The chat will be shown at the bottom right side.**

### **NOTE:**

**Remember chat will not work if Pusher is not configured correctly or not setup at all.**

## Additional options

Setup->Settings->Chat Settings

1. **Option** to Enable / Disable chat module.
2. **Option** to allow staff to delete own messages.
3. **Option** to enable live Desktop notifications for messages in chat and group chat.
3. **Option** to Enable / Disable clients chat support.

## Adding linear gradient colors

Generate your own **linear** gradient color: <https://cssgradient.io/>

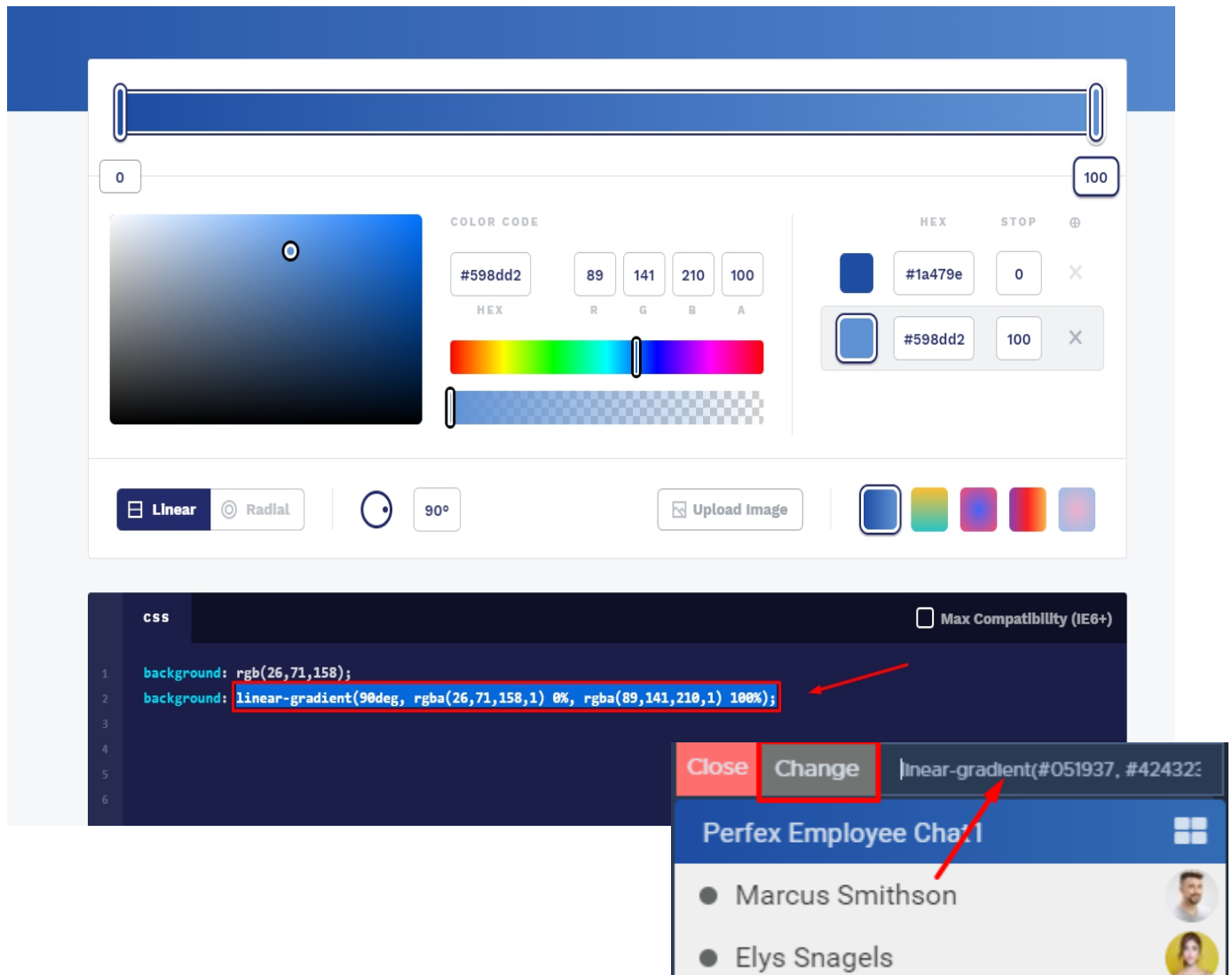
Currently chat gradient colors accepts linear gradient colors and we think that it is best for UI / UX.

After you copy the color you need to enter it inside the **input box in the small toggled chat** window. Browser will reload and you will have a nice chat nice modern look.

**NOTE:** You need to copy like shown in picture eg: linear-gradient( #color1, #color2 );

; sign at the end is required otherwise your color will not be applied.

If you get stuck just click Reset Colors.



## Upgrade

To upgrade Perfex CRM employee chat you can upload the newest downloaded **prchat.zip** file in **Setup->Modules** or via FTP as explained in the second installation method.

After uploading the latest Perfex CRM employee chat version files, **if database upgrade is required, Perfex CRM will ask you to upgrade the database, click on upgrade database and you will be all set.**

Keep in mind that in most cases, you will need to clear your browser cache when new version is released because of CSS/JS changes.

Possible issue when unzipping the file on Mac users.

You can do the following:

Download the <https://theunarchiver.com/> and install on your PC then right click on the ORIGINAL file downloaded from Envato and select the Unarchiver.