



# **Forfait – Support Package Manager**

**Module for Perfex CRM**

**User Guide**

Version 1.0.0

# 1. Introduction

Forfait is a support package management module for Perfex CRM.

It allows you to define, assign, and manage service units such as tickets, Q/A, or interventions.

Each package can be configured with its own renewal cycle, validity rules, and usage tracking, giving you full control over service delivery.

## 2. Installation

1. Download the module ZIP file from CodeCanyon
2. Log in to your Perfex CRM admin area
3. Go to **Setup** → **Modules**
4. Click **Upload Module** and select the downloaded ZIP file
5. Once uploaded, locate the **Forfait** module in the list
6. Click **Activate**

After activation, a new menu related to package management will appear in the admin interface.

### **Alternative (Manual Installation)**

You can also install the module manually by extracting the ZIP file and copying the forfait folder into the /modules directory via FTP.

## 3. First Setup

### 3.1 Create a Package Type

Navigate to:

**Packages → Manage Package Types → Add New Package Type**

- Define the package name
- Define the object label (your service unit: tickets, interventions, calls, etc.)

**Note:**

If you enter the label in plural form (e.g. "tickets"), the module will automatically generate the singular form by removing the final "s" (e.g. "1 ticket", "2 tickets").

- Define the number of units (e.g. 3)
- Configure the validity duration (e.g. 1 month)
- Configure the renewal frequency (e.g. 1 month, or 0 for no renewal)
- Choose whether the package is cumulative or not

**Note:**

The renewal frequency cannot be greater than the validity duration.

Each package type defines how units behave over time.

**Add a package type**

[← Back to package types](#)

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Package name\*

Object label (e.g. Ticket, Q/A, Intervention)

Number of objects:  Validity duration:  months Renew every:  months Cumulative?:

Set 0 for no auto-renewal.

Description

**Dynamic discounts (optional)**

Info: Discounts are applied by tiers. For example:  
 Month 1 → 5%, Month 4 → 10% means 5% applies for months 1 to 3, then 10% from month 4.  
 Months must be entered in ascending order (e.g., 1, 4, 7...).

Discount type:

Behavior after last discount:

Trigger month	Discount value (%)	Actions
+ Add discount		

– Figure 1 – Package type configuration

## Optional: Configure Discounts

You can define progressive discounts based on the subscription duration.

Discounts can be configured using:

- Percentage or fixed amount
- Defined steps based on time (e.g. after 3, 6, or 12 months)

This allows you to reward long-term clients with better pricing over time.

### Note:

Discounts define commercial offers and are not automatically applied to invoices. They should be applied manually during the billing process

## 3.2 Assign a Package to a Contact

Once a package type has been created:

- Select a contact
- Assign the desired package
- Set the start date

The initial number of units is defined by the package type settings.

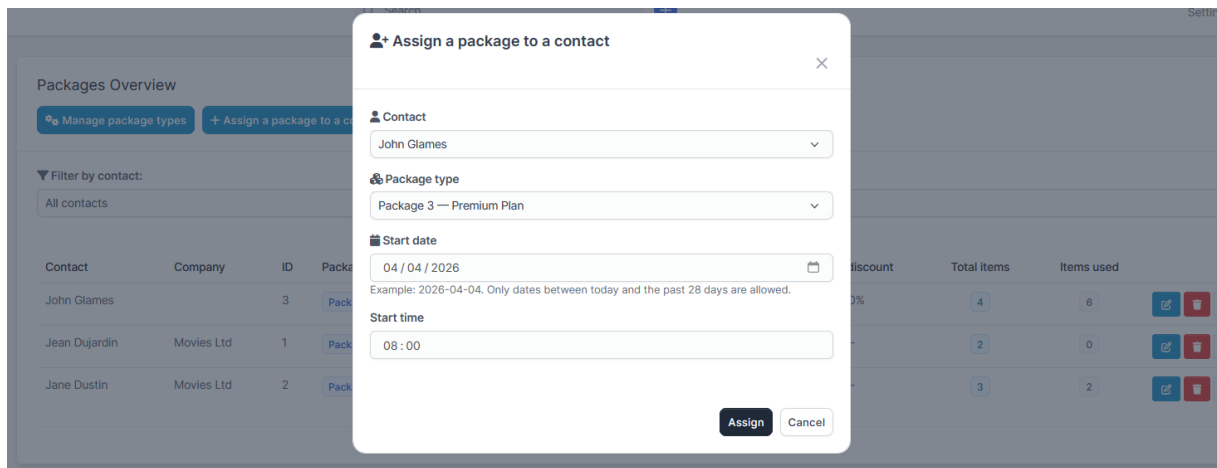


Figure 2 – Assigning a package to a contact

## 3.3 Check Available Units

You can monitor unit usage directly from the module home page.

For each assigned package, you can view:

- Total units available
- Units already used
- Remaining units

This provides a clear, real-time overview of service consumption for each client.

Contact	Company	ID	Package name	Next renewal	Package	Current discount	Total items	Items used	Action
John Glames		3	Package 3 — Premium Plan	2026-05-01	month 1	5.00%	4	6	Deactivate
Jean Dujardin	Movies Ltd	1	Package 1 — Basic Plan	No renewal	month 1	—	2	0	Deactivate
Jane Dustin	Movies Ltd	2	Package 2 — Standard Plan	2026-04-08	week 1	—	3	2	Deactivate

Figure 3 – Units usage overview

## 4. How It Works

### Units (Items)

Each package contains a defined number of units. These units can represent tickets, Q/A, calls, or any service defined in your configuration.

### Renewal Logic

Units are automatically renewed based on the renewal settings defined in the package type

### Validity

Each batch of units has a validity period. Expired units are automatically removed if not used.

### Usage Tracking

Each time a unit is used, it is deducted from the available stock.

## History

All actions (usage, adjustments) are recorded, allowing full traceability.

## Admin and Client Views

### • Admin View:

Administrators can manage packages, track usage, and perform manual adjustments.

### • Client View:

Clients can view their assigned packages, available units, and usage history directly from their dashboard.

Clients have read-only access to their package information.

## 5. CRON Setup

To automate package renewal and lifecycle management, you must configure a CRON job.

Use the following URL:

[https://YOUR\\_DOMAIN/forfait/cron/update\\_stock?token=YOUR\\_TOKEN](https://YOUR_DOMAIN/forfait/cron/update_stock?token=YOUR_TOKEN)

Replace:

- YOUR\_DOMAIN with your domain
- YOUR\_TOKEN with your secure token

## Recommended Frequency

The execution frequency depends on your package configuration:

### • Monthly plans:

A daily execution is sufficient (e.g. once per day)

- **Weekly plans:**

Run the CRON every 12 hours

- **High-frequency or short-term plans:**

Run the CRON more frequently if needed

For most use cases, running the CRON once or twice per day is enough.

## **Purpose of the CRON**

The CRON handles:

- Automatic renewal of units
- Expiration of unused units
- Synchronization of package stock
- Update of discount steps based on subscription duration

## **6. Requirements**

- Perfex CRM version 2.9 or higher
- PHP version 7.4 or higher

## **7. Support**

For documentation, tutorials, and support requests:

<https://support-enligne.pro/forfait-module/>

To request support directly:

<https://support-enligne.pro/forfait-module/#help>