



CRM Mobile App – Installation Guide (SOPs)

This guide explains how to install and set up the CRM mobile application. make sure smooth working of the application, please follow all steps carefully.

Important Notes

- Use a stable internet connection
- Enter correct login details
- Follow all steps properly to avoid issues
- If you face any issue, contact support
- Use a stable internet connection

Checklist

- Remove all old APK files
- Turn OFF Play Protect
- Install the APK
- Enter provided URL in configuration (**Base URL**)
- Enable all permissions and accessibility

Important Before Installation

Before installing the new CRM application, please make sure to remove all old APK files from your mobile.

- Go to your **File Manager** and delete all previous CRM APK files
- After deleting, also check the **Trash / Recycle Bin** and remove them from there as well
- This step is very important to avoid installation errors or conflicts

Once all old APK files are completely removed, you can proceed with installing the new APK.

Please follow all steps carefully to ensure the application works smoothly.

1. Install the APK

- Open the APK file.
- Android will show a security popup → tap **Settings** → enable **Allow from this source**.



2. Turn off Play Protect

Some devices block APK installation due to Play Protect.

How to disable Play Protect:

Play Store → Tap profile icon → **Play Protect** → **Settings icon** → Turn **Off** “Scan apps with Play Protect”.

3. Enable Required Permissions / Accessibility

Different phone brands have different paths. Use the one that matches your device.

Common Paths by Device:

Path 1 – Common Android

Settings → App Management → App List → **CRM** → (3 dots) → **Unlock restricted settings**

Path 2 – Alternate Android

Settings → Apps → **CRM** → Advanced → **Allow restricted settings**

Path 3 – Samsung

Settings → Apps → **CRM** → Battery → **Unrestricted**

Path 4 – Xiaomi / Redmi / Poco

Settings → Apps → Manage apps → **CRM** → Other permissions → **Allow**

Path 5 – Oppo / Vivo / Realme

Settings → App management → App list → **CRM** → (3 dots) → **Allow restricted settings**

Path 6 – Infinix / Tecno

Settings → Apps → **CRM** → Battery saver → **Allow background running**



Path 7 – Huawei

Settings → Apps → **CRM** → Battery → **Unrestricted**
Permissions → Allow all required permissions

Step 4: Allow Permissions

- Allow all required permissions:
 - Notifications
 - Storage
 - Location

This is required for proper app functionality.

5. After Installation

Open the app → Go to **Configuration Path** → Enter the URL provided → Save → Log in with your user.

Step 6: Mobile Call Recording (If Required / Features)

- Enable auto call recording from your phone dialer settings
 - This is required for proper call recording in the app
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Changes in this Version

- In **My Tasks**, data of the last 2 days will be shown. Older data can be checked using the date filter
 - In **My Leads**, data of the last 3 days will be shown. Older data can be viewed using filters
 - On the **Dashboard**, data of the last 7 days will be shown. More data can be viewed using filters
 - New lead stages are added in **New Leads** and **Follow-up**
 - User can add more than one number while creating a new lead
 - User can update WhatsApp number and alternate number from **My Client List** using the edit option
 - Facebook parameters details can be viewed in **Lead Details** and **Follow-up Details**
 - **Activity Log is added for Admin & Staff users** and to track system activities
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