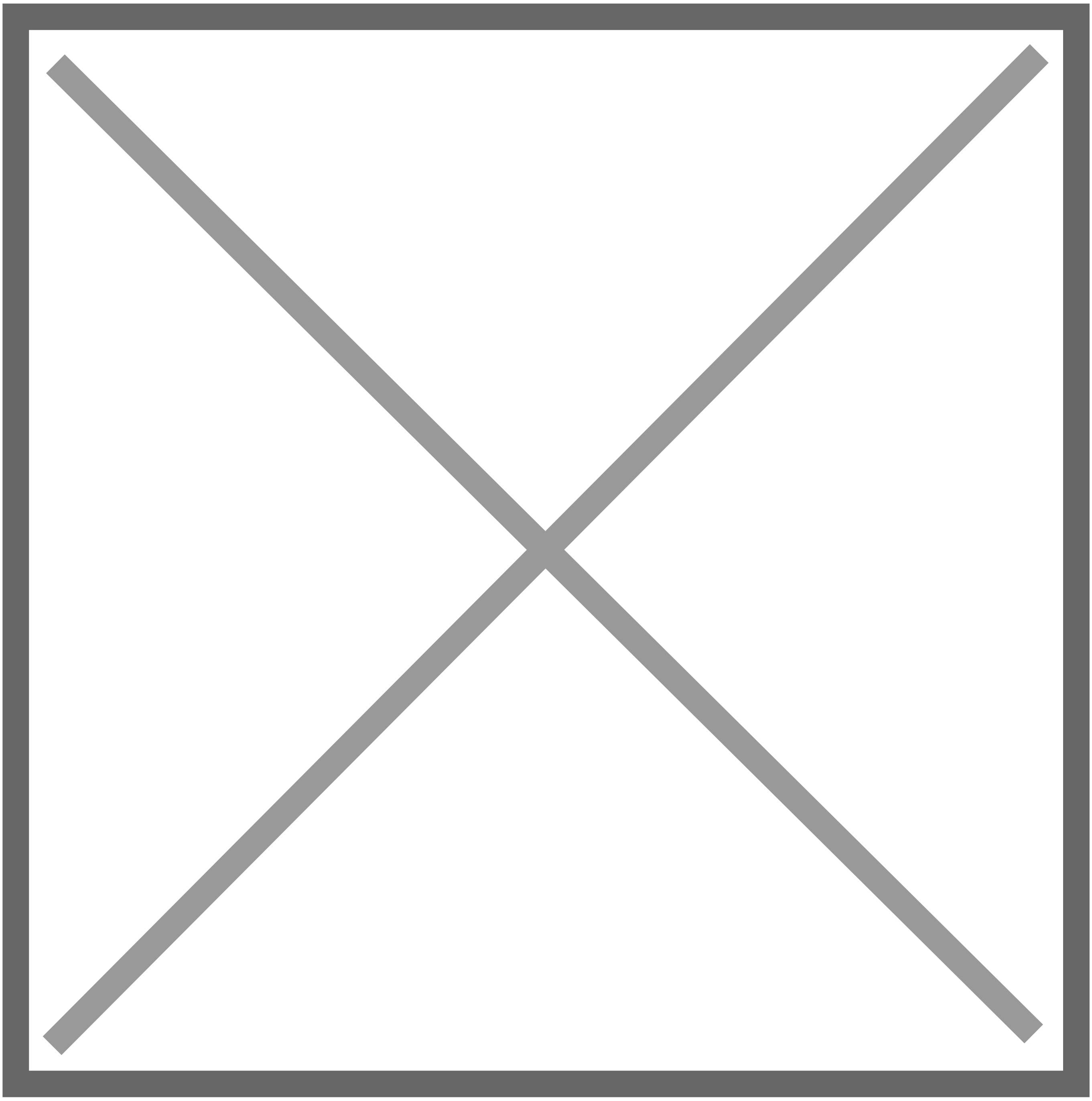
Calls

The Calls module in KiyoCRM allows Users to schedule and log a record of inbound and outbound calls that they may be a participant of:

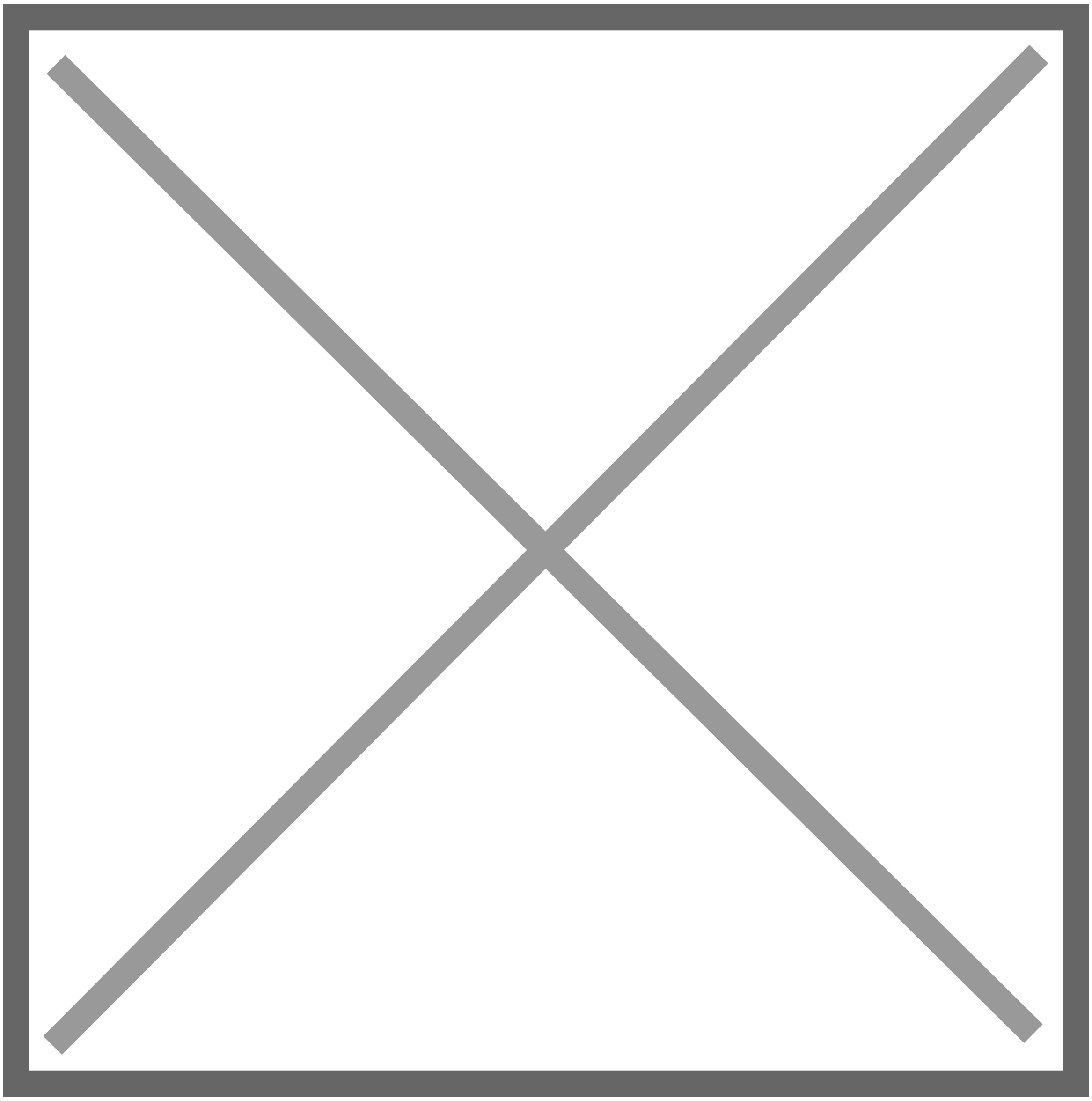
List View Actions

You can access the Calls actions from the Calls module menu drop down or via the Sidebar. The Calls actions are as follows:

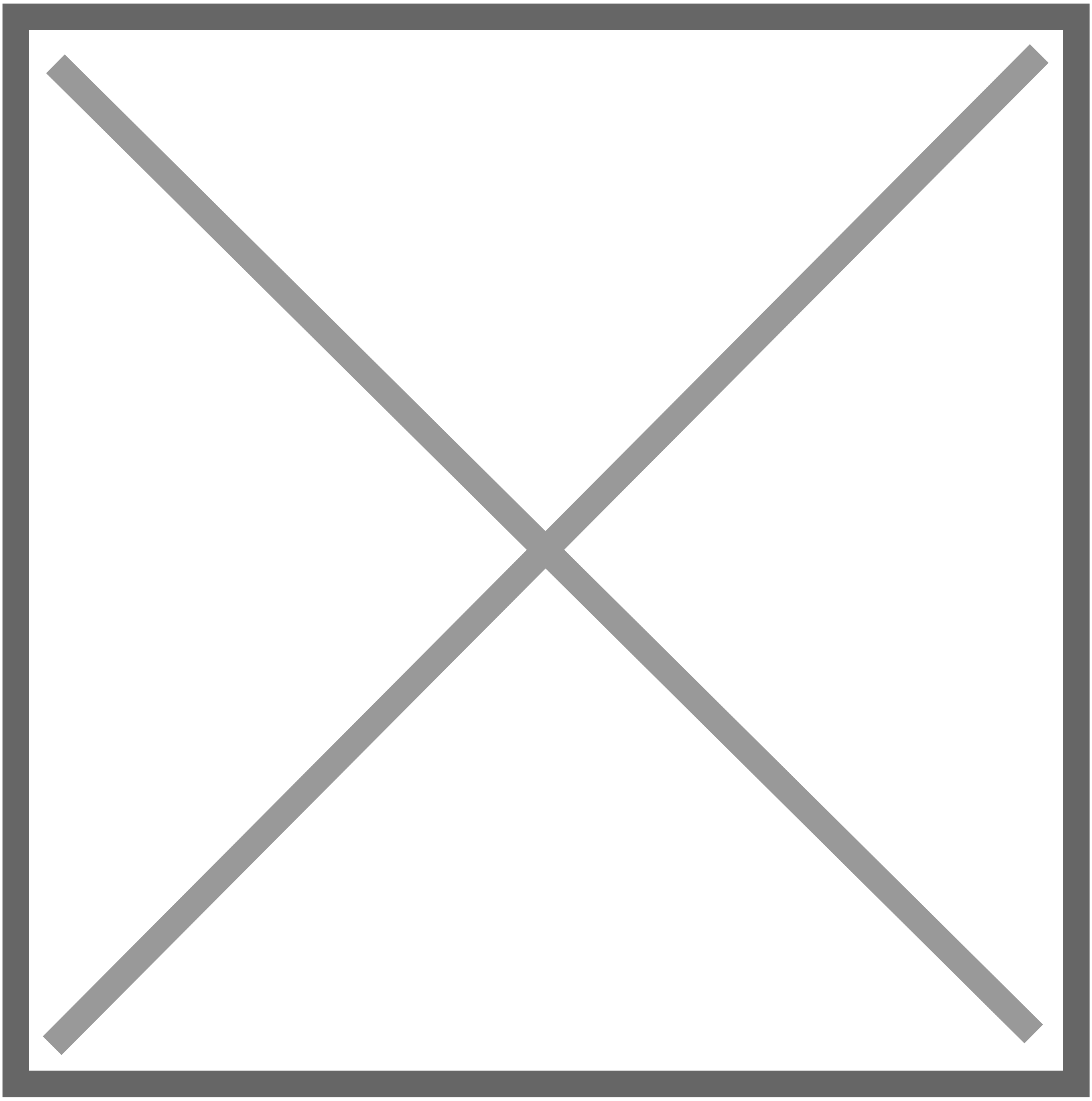
- **Log Call** – A new form is opened in Edit View to allow you to create a new Call record.

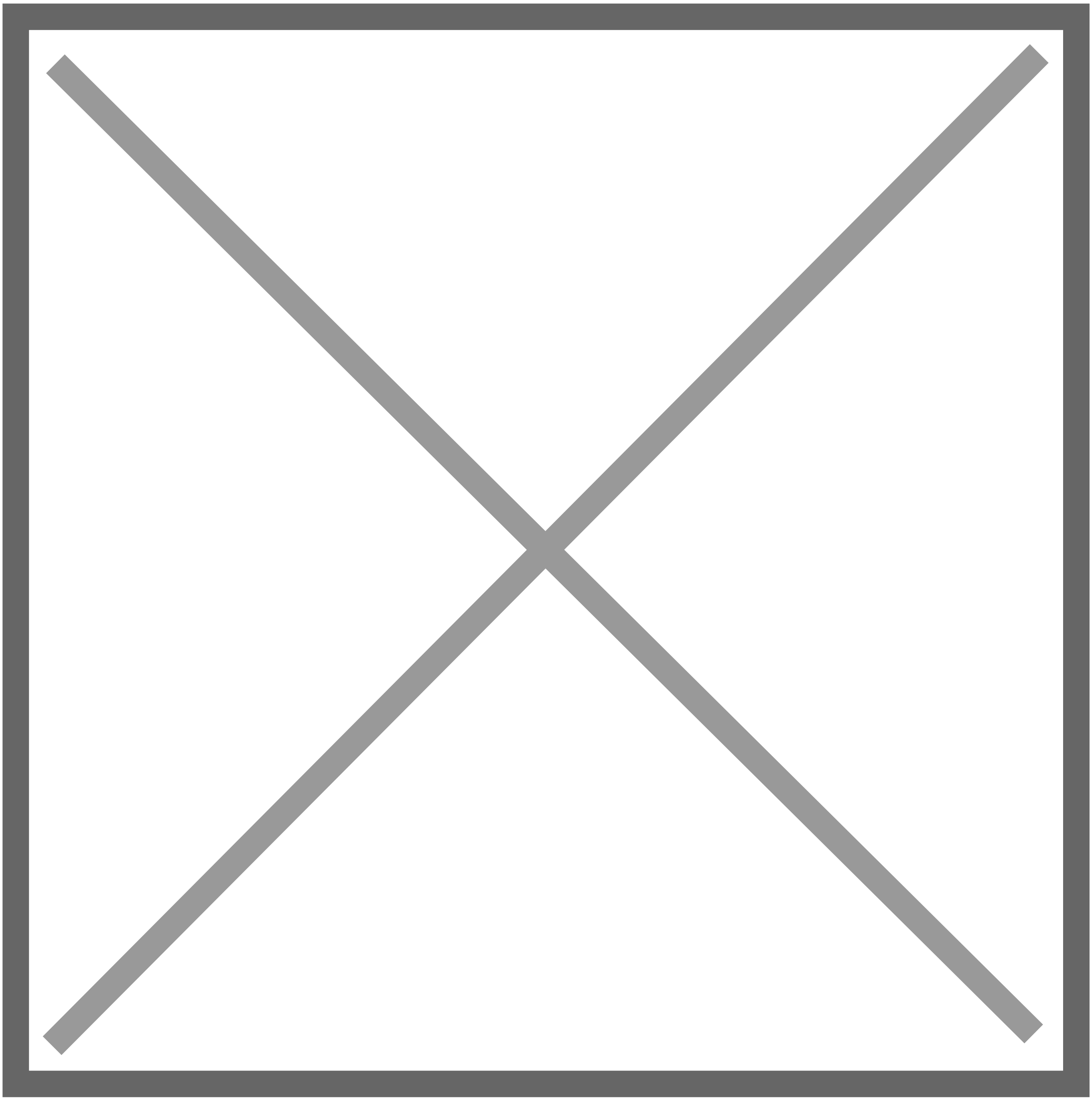


Allows users to record details of phone conversations with leads, contacts, or companies, including call purpose, outcome, duration, and follow-up actions for accurate communication tracking.



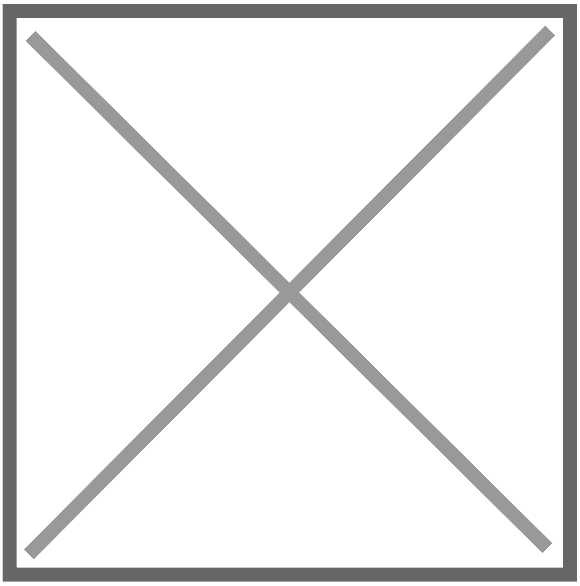
Using Click to Call Configuration, triggering calls and saving response through API and tracking through status. Call recordings are also saved, and we can view in detail.





- **View Calls** – Redirects you to the List View for the Calls module. This allows you to search and list Call records.
- **Import Calls** – Redirects you to the Import Wizard for the Calls module. For more information, see Import of leads module.
- **Kanban View, Filters, Column Chooser, Favorites** are similar to other modules. Refer Leads module Column Chooser , Filters , Kanban view for reference.
- To sort records on the Meetings List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Meeting, Use Search engine on top
- Clicking on the pencil icon Meetings list view page to the display of record edit view.
- Clicking on the ‘i’ icon calls to the display of Additional Details popup.

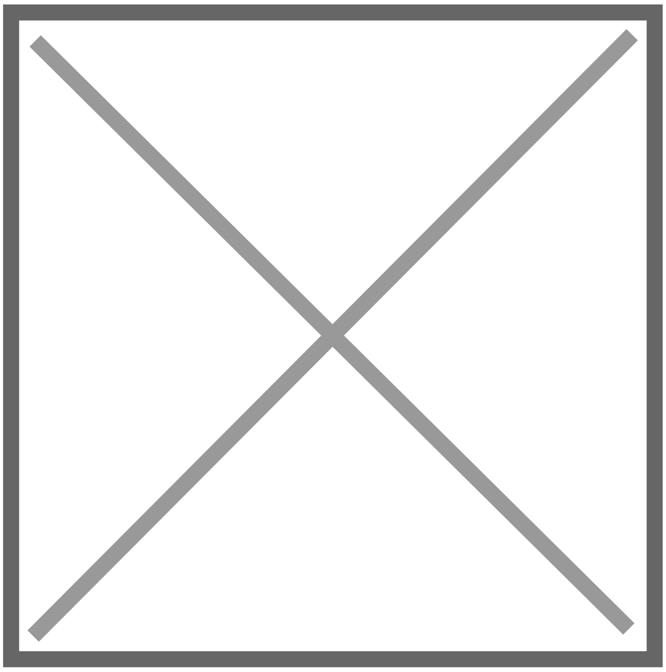
- Clicking on the X icon calls to the closure of the meeting in the list view page.



Bulk Actions

In list view, Select group of records by checking the checkbox, the actions are as follows:

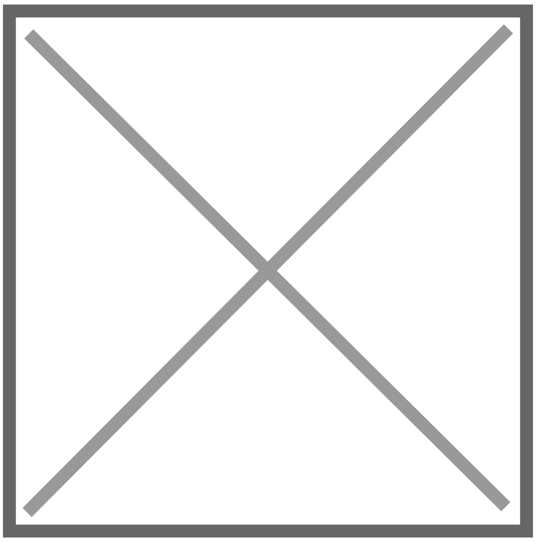
- **Mass Update, Export, Delete** are similar to the Meetings module. Refer Meetings module Bulk Actions for reference.



Detail View Actions

Click on the Subject to view detail view:

- **Edit, Duplicate, Delete, Close and Create New, Close** are similar to Meetings module Actions.
- **Reschedule:** Enables users to update the date and time of a logged call, ensuring accurate scheduling and follow-up.



Submodules

Contacts

Displays and manages the list of attendees linked to a meeting, allowing users to add, search, or create contact records for scheduling.

image.png

Users

Allows assignment of CRM users to meetings, enabling collaboration, ownership tracking, and calendar visibility for scheduled events.

image.png

Leads

Enables users to link potential customers (leads) to meetings for follow-ups, demos, or discussions, helping track engagement throughout the sales process.

image.png

Notes

Allows users to add and view notes related to a meeting, capturing key discussion points, decisions, and follow-up actions for future reference.

image.png

Security Groups

Control access to meeting records by assigning them to specific user groups, ensuring only authorized users can view or modify the information.

image.png

Note: --Edit view, Detail view and list view form fields and layouts can be customized as per requirement using Administration Settings. Submodules also Customized as per usage.

Revision #9
Created 12 May 2025 09:32:05 by Admin
Updated 22 May 2025 09:55:40 by Admin