Cases

In KiyoCRM Cases are used to record interactions with Customers when they ask for help or advice, for example in a Sales or Support function. A Case can be created, updated when a User is working on it, assigned to a colleague and closed when resolved. At each stage of the Case the User can track and update the incoming and outgoing conversation thread so a clear record of what has occurred is registered in the CRM. Cases can be related to individual records such as Companies, Contacts and Bugs.

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List View Actions

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

- **Create Case** – A new form is opened in Edit View to allow you to create a new Company each and list Case records.
- **Import Cases** – Redirects you will be taken to the Import Wizard for the Cases module.

  Refer Leads module for import functionality. Click here to view Import functionality.
- Use **Filter** for Search of records - **Quick filter and Advanced filters**

Note: Refer Quick filter of Leads

- **Recently viewed** records displayed in the side nav bar.
- Saved filters list showing inside nav bar as **My Filters.**
- Favorite records of cases would be displayed in the side nav bar. (From a detailed view of records, selecting the star beside the title undergoes a record into the favorites list.)
- **Column Chooser** — The Column Chooser allows you to customize which columns are displayed in the list view by showing or hiding specific fields.

Note: Refer Leads module for Colum Chooser.

- To sort records on the Cases List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Case, Use Search engine on top
- Clicking on i icon leads to the display of additional details popup of the case

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Bulk Actions

In list view, there are some groups of actions which can be done by selecting group of records wish are as follows:

- **Mass Update:** Apply changes to multiple company records at once.
- **Merge:** Combine duplicate or similar opportunity records into one.
- **Export:** Download the selected opportunity data in a preferred format (.CSV).
- **Map:** View the geographical location of opportunities on a map.
- **Delete:** Remove selected opportunity from the system.

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Detail View Actions

Click on the case subject to view a detailed view of the record.

- **Edit** – Modify the case's existing information.
- **Duplicate** – Create a new case by copying current company details.
- **Delete** – Permanently remove the case from the system.
- **Find Duplicate** – Scan and identify possible duplicate case entries.
- **View Changelog** – Review the history of changes made to this case.

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Case's Activity Management

Assign and track specific actions required to resolve a case. Tasks include due dates, priorities, and responsible team members.

- **Schedule Meeting:** Plan and record meetings with customers or internal teams related to the case. Includes date, time, participants, and agenda.
- **Log Call:** Document details of inbound or outbound calls regarding the case, including discussion points, duration, and outcomes.
- **Compose Email:** Send and record case-related emails directly from the system, maintaining full communication history for reference.

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Case's History Management

Add internal notes or upload relevant documents to maintain a complete case history.

- **Archive Email:** Store important email communications related to the case for future reference.
- **View Summary:** Quickly review key case details, recent activities, and status in a consolidated view.
- **Filter:** Narrow down case history by date, activity type, or keyword for easier tracking and analysis.

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Submodules

Documents

Store, manage, and access all files related to a case, including reports, screenshots, contracts, and reference materials, ensuring centralized and organized documentation.

Can create a new one or select from existing one.

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Contacts

Manage and view all individuals linked to a case, including customers, stakeholders, or internal team members, with full contact details for easy communication.

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Bugs

Track and manage software bugs or technical issues reported within a case, including status, severity, and resolution progress for effective issue handling.

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SLA Log

Monitor service level agreement (SLA) performance for each case, including response and resolution times, breaches, and compliance history.

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Projects

Link related projects to a case to track associated tasks, timelines, and deliverables, ensuring coordinated resolution and visibility across teams.

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Security Groups

Control access to case information by assigning users to security groups, ensuring only authorized personnel can view or modify sensitive case data.

Can select from existing one.

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