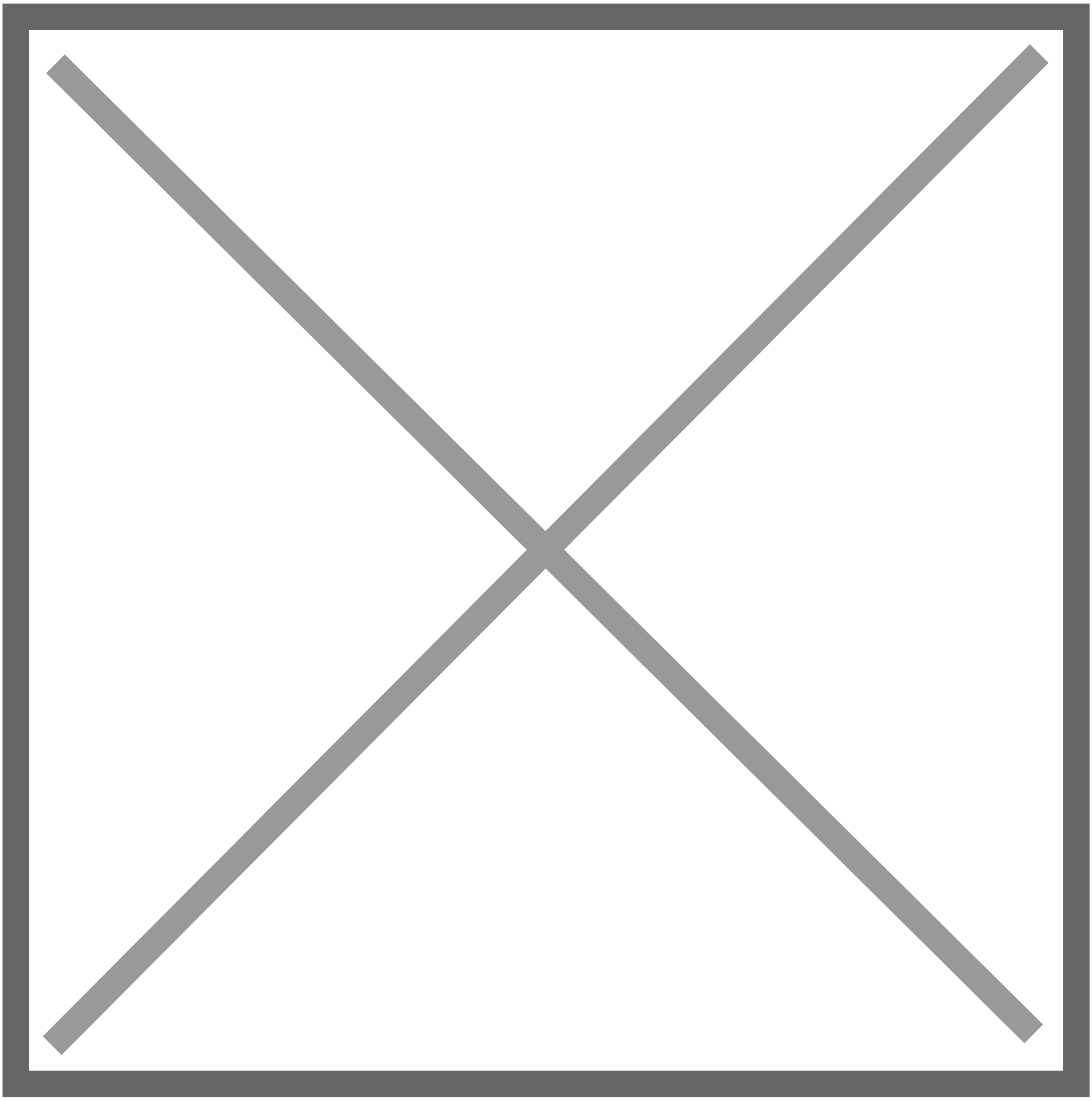
# Companies

The Companies module is the centralized base from which you can create an association with most records in KiyoCRM. It is possible to create a relationship with Contacts, Converted Leads, Opportunities, any Activity such as Emails or Meetings and Cases. Companies in KiyoCRM will typically hold all information specific to a company that your organization will have a relationship with. In real world terms a Company may be a business entity that is a qualified Sales Prospect, Customer, Supplier or Re-seller and can be used to track all interactions that take place between these entities and your organization.

# List View Actions

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



- **Create Company** – Once clicked, a new form is opened in Edit View to allow you to create a new Company record.
- **View Companies** – Once clicked, you will be redirected to the List View for the Companies module. This allows you to search and list Companies records.
- **Import Companies** – Redirects you to the Import Wizard for the Companies module.
- **Kanban View** – Visual workflow by Company type (Analyst, Competitor etc.)

**Note**: Set the filter by changing kanban settings using Settings icon on the top right side.

image.png

- 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 companies 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.

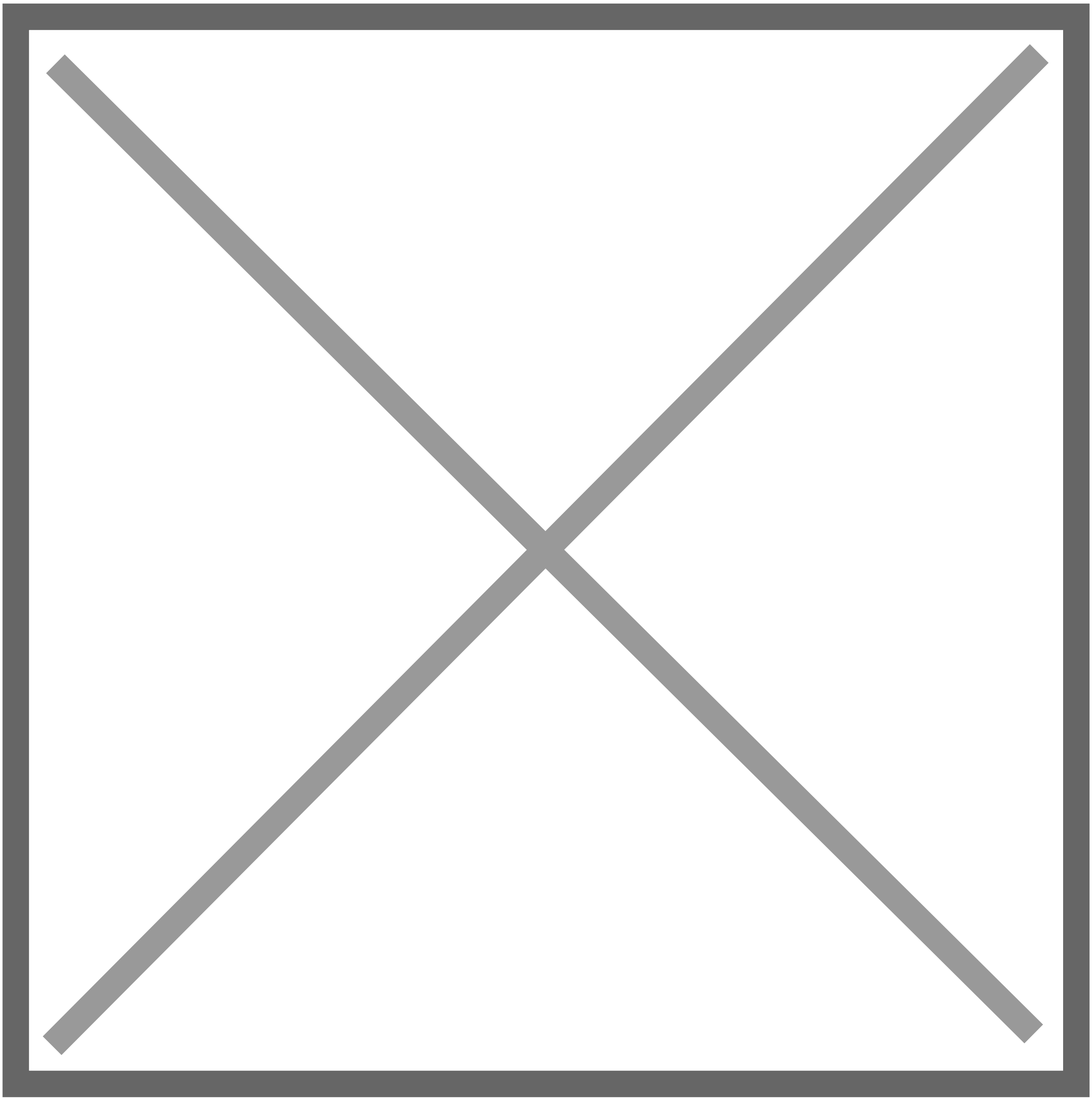
**Note:** Refer Leads module for Column Chooser.

- To sort records on the Companies List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Company, Use Search engine on top

# Bulk Actions

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

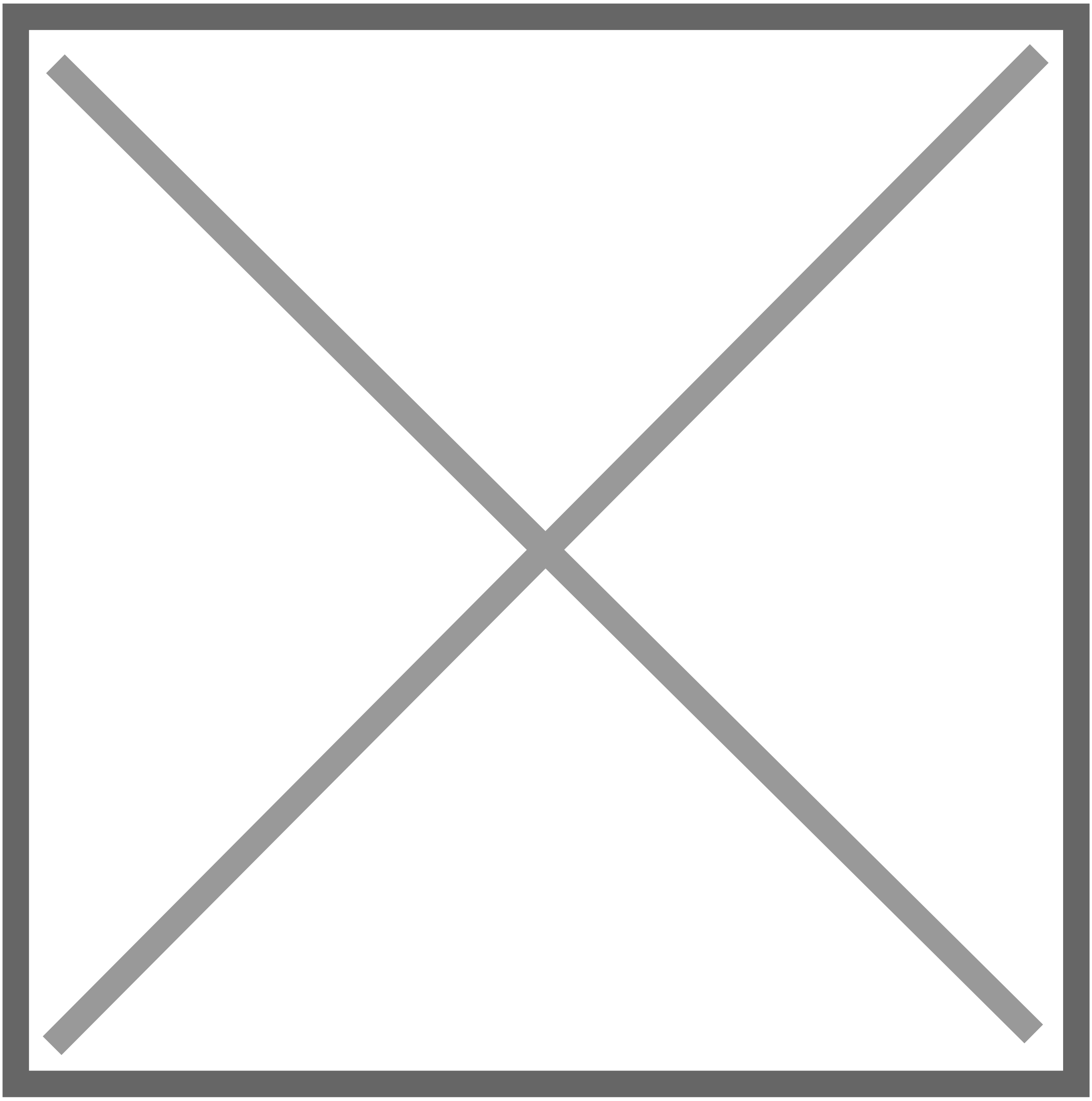
- **Email**: Send an email to the selected companies directly.
- **Mass Update**: Apply changes to multiple company records at once.
- **Merge**: Combine duplicate or similar company records into one.
- **Add to Target List**: Add selected companies to a marketing or campaign list.
- **Print as PDF**: Generate a PDF version of the selected company records.
- **Export:** Download the selected company data in a preferred format (.CSV).
- **Map**: View the geographical location of companies on a map.
- **Add Contacts to Target List**: Add selected companies related Contacts to a marketing or campaign list.
- **Send Bulk SMS**: Send a text message to multiple selected companies.
- **Delete**: Remove selected companies from the system.



# Quick Contact Options

In List view – Click to Call Configuration, WhatsApp and SMS icons are available for quick contacting. History should be tracked under a detailed view of every record under the History Submodule.

**Note:** Call recordings are also tracked and responses updated automatically through API.



# Company One View

The Company One View provides a centralized, comprehensive snapshot of all key data and interactions related to a company. It consolidates associated contacts, opportunities, quotes, cases, documents, projects, and communication history into a single interface, enabling sales, support, and marketing teams to collaborate effectively and make informed decisions.

Click on the eye icon in the list view to open the Company One View.

## ? Profile Section:

- **Company Name & Logo Details**: Displayed prominently with either the uploaded logo or initials inside a circle.
- **Rating Stars**: Visual representation of customer priority or satisfaction (e.g., 3 out of 5 stars).

Company Actions:

- □□ Email
- □□ Call
- □□ Video Call
- □□ WhatsApp

**Basic Info**: Displays the company phone, email, website, and location.

**Links**: Navigate to the Compose email, Call initiation, Video Call initiation, WhatsApp chat pages when user click on Email, Phone, Video, WhatsApp icons respectively.

# ? Activity Summary Cards:

Each module card shows the number of related records, with format:
[Closed / Total]

- Cases
- Tasks
- Opportunities
- Leads
- Projects
- Quotes
- Invoices
- Contracts
- Documents

- Events

# ? Revenue & Purchase Insights:--

Displays financial and transactional data:

- First Purchase Date
- Last Purchase Date
- Purchased Products
- Pending Revenue
- Received Revenue
- Total Revenue

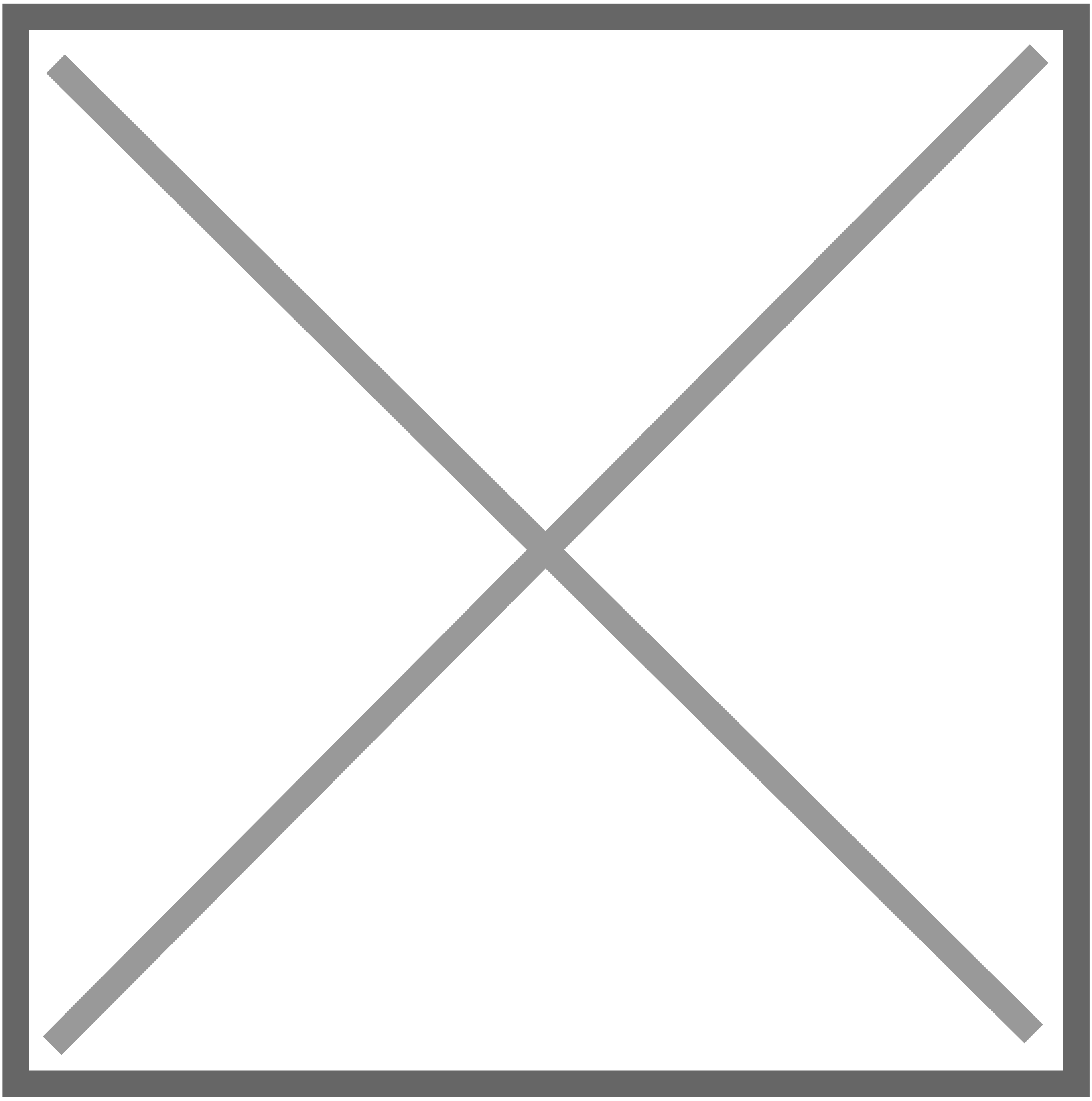
Note: If no data is available, the field displays None or 0.

# ? Quick Actions:

- **Create Case** – Instantly open a support or service ticket.
- **Create Opportunity** – Launch a new sales deal from the company profile.

□□ Close Button:

Closes the One View screen and returns to the previous interface.

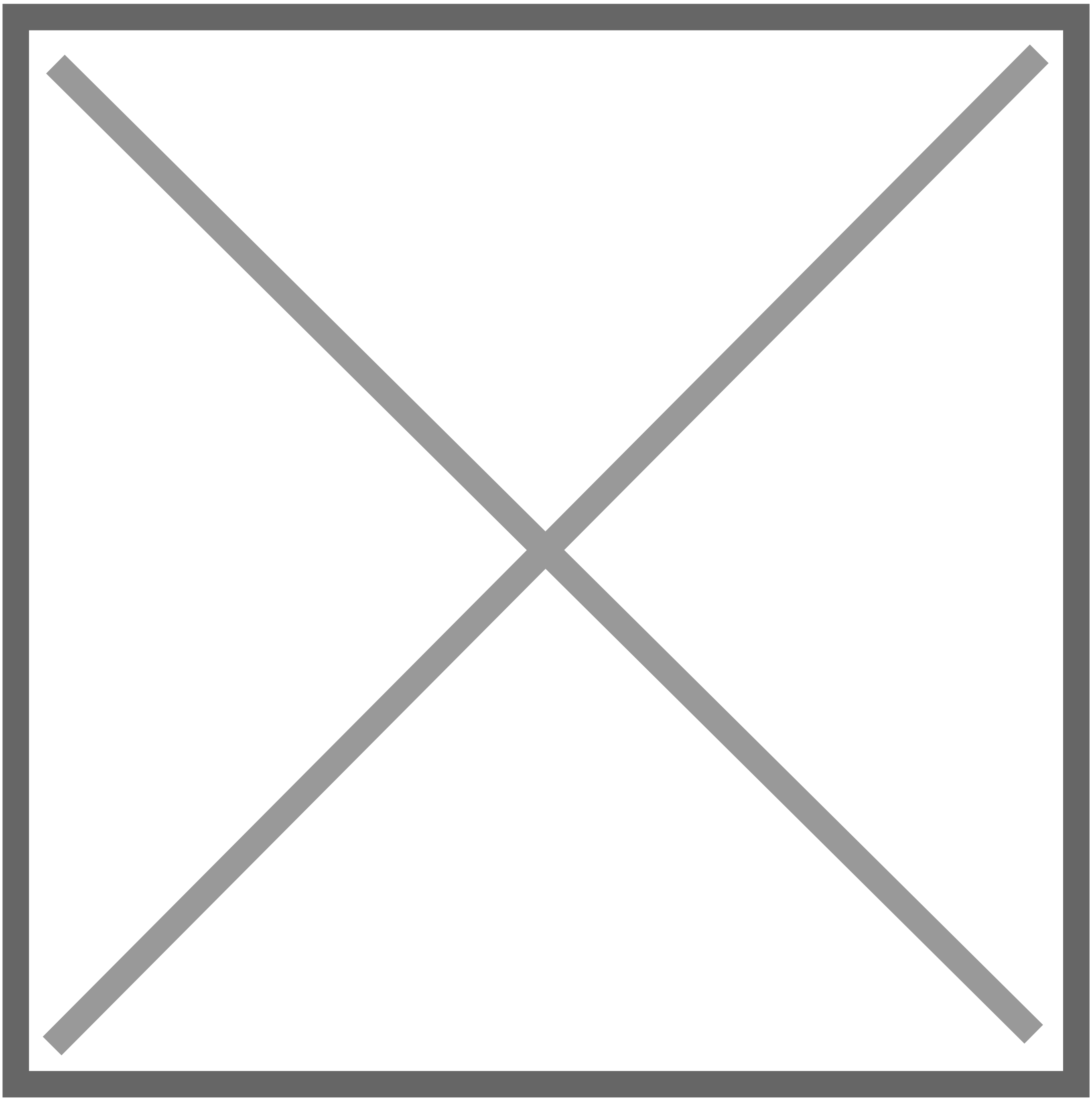


# Detail view Actions

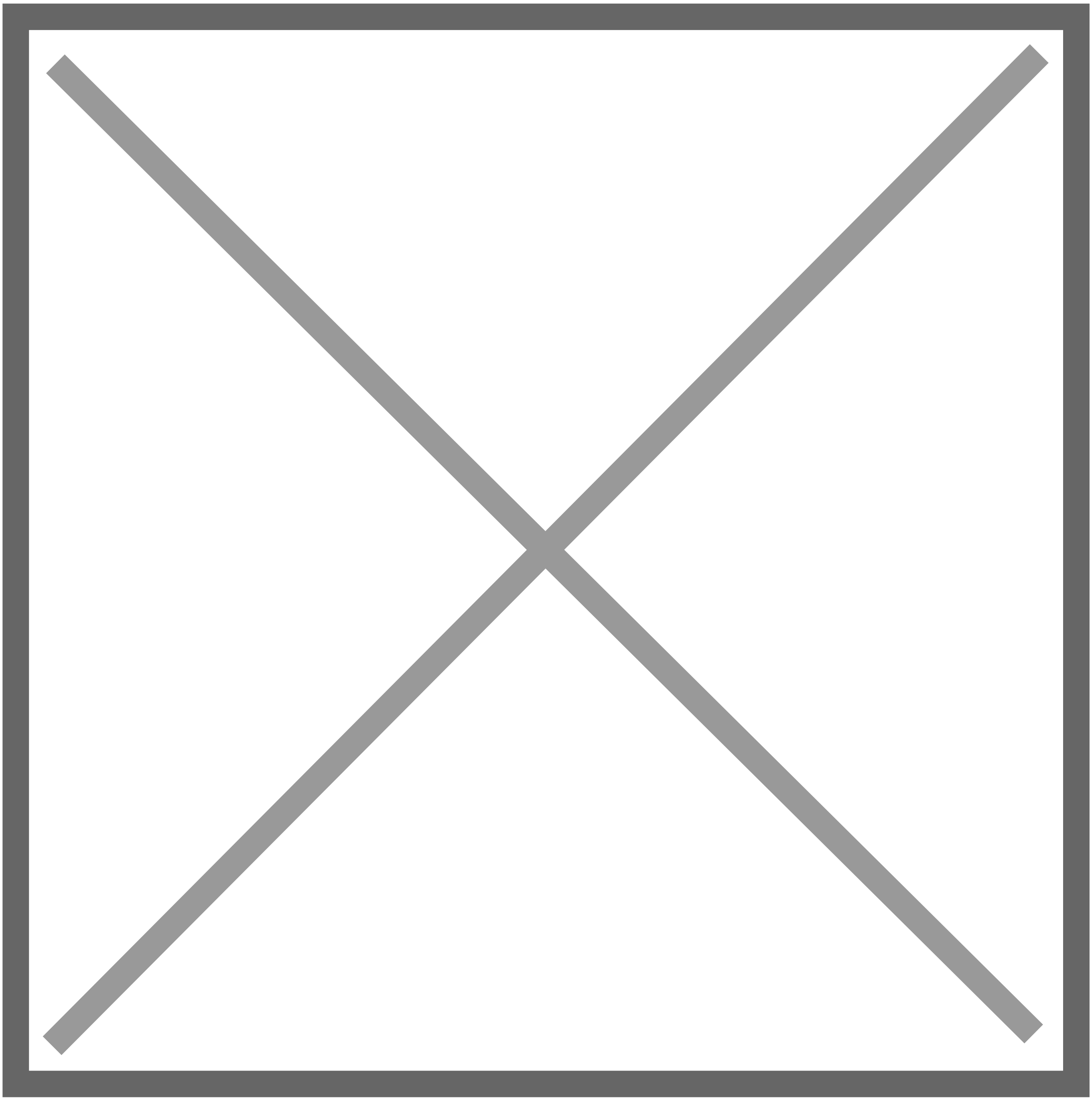
The Company Detail View provides a complete overview of a company's profile, including key information, associated contacts, sales data, support history, and related records. It serves as the central hub for managing all interactions and relationships tied to the company.

Click on the company name to view a detailed view of the record.

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



**Copy Button**: Copies the address to the linked contact's address field.



# Company’s Activities Management

Company Activity Management tracks all interactions and engagements with a company, including calls, meetings, tasks, emails, and notes. It helps teams stay coordinated, follow up effectively, and maintain a complete timeline of activity history.

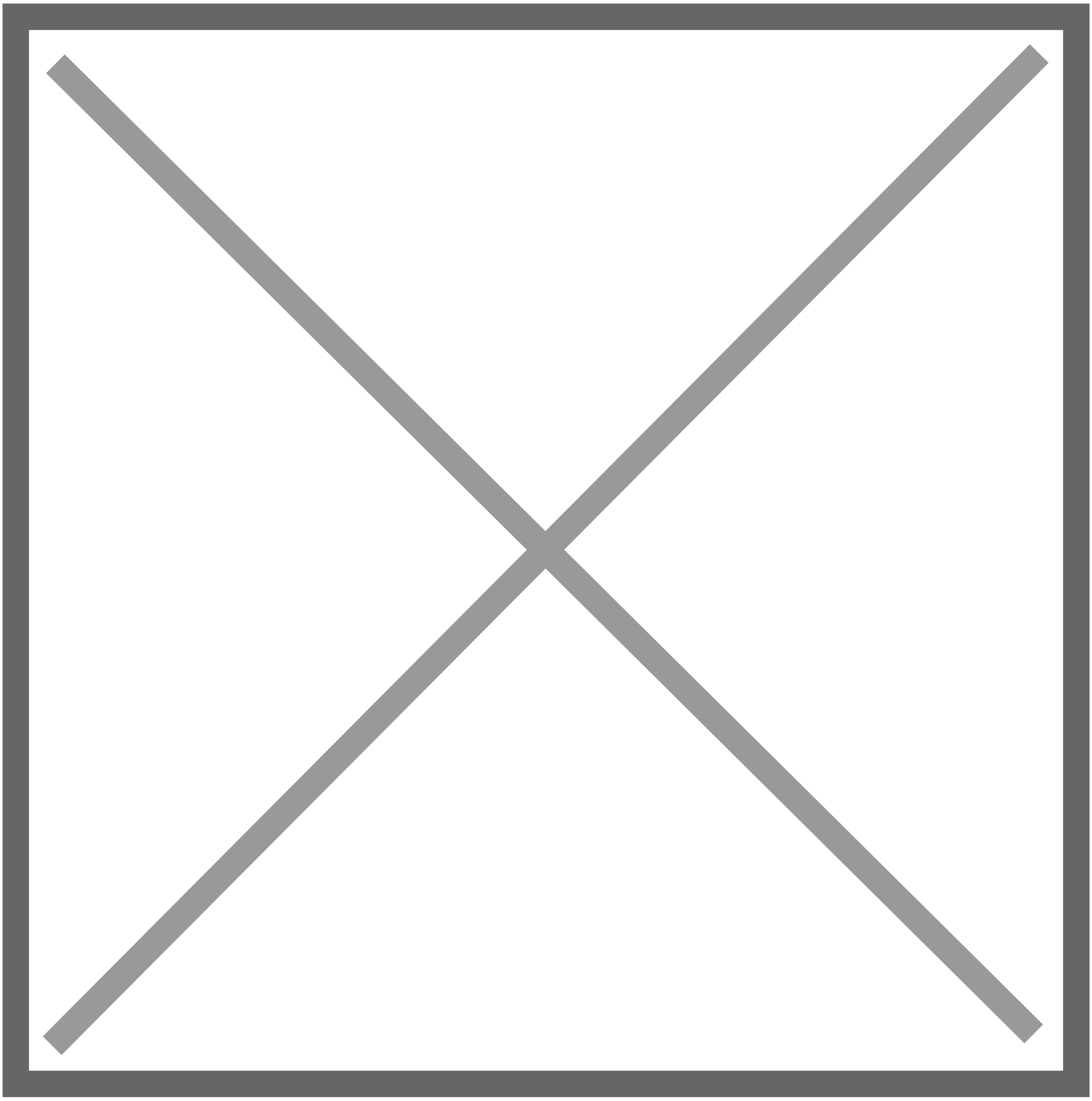
In the detailed view, there is an activities tab. All actions (emails sent, updates, etc.) are tracked per company.

- **Create Task** – Assign a task related to the company to ensure follow-up actions are completed on time.

- **Schedule Meeting** – Set up a meeting with the company to discuss business opportunities or next steps.

- **Log Call** – Record details of a phone conversation with the company for future reference.

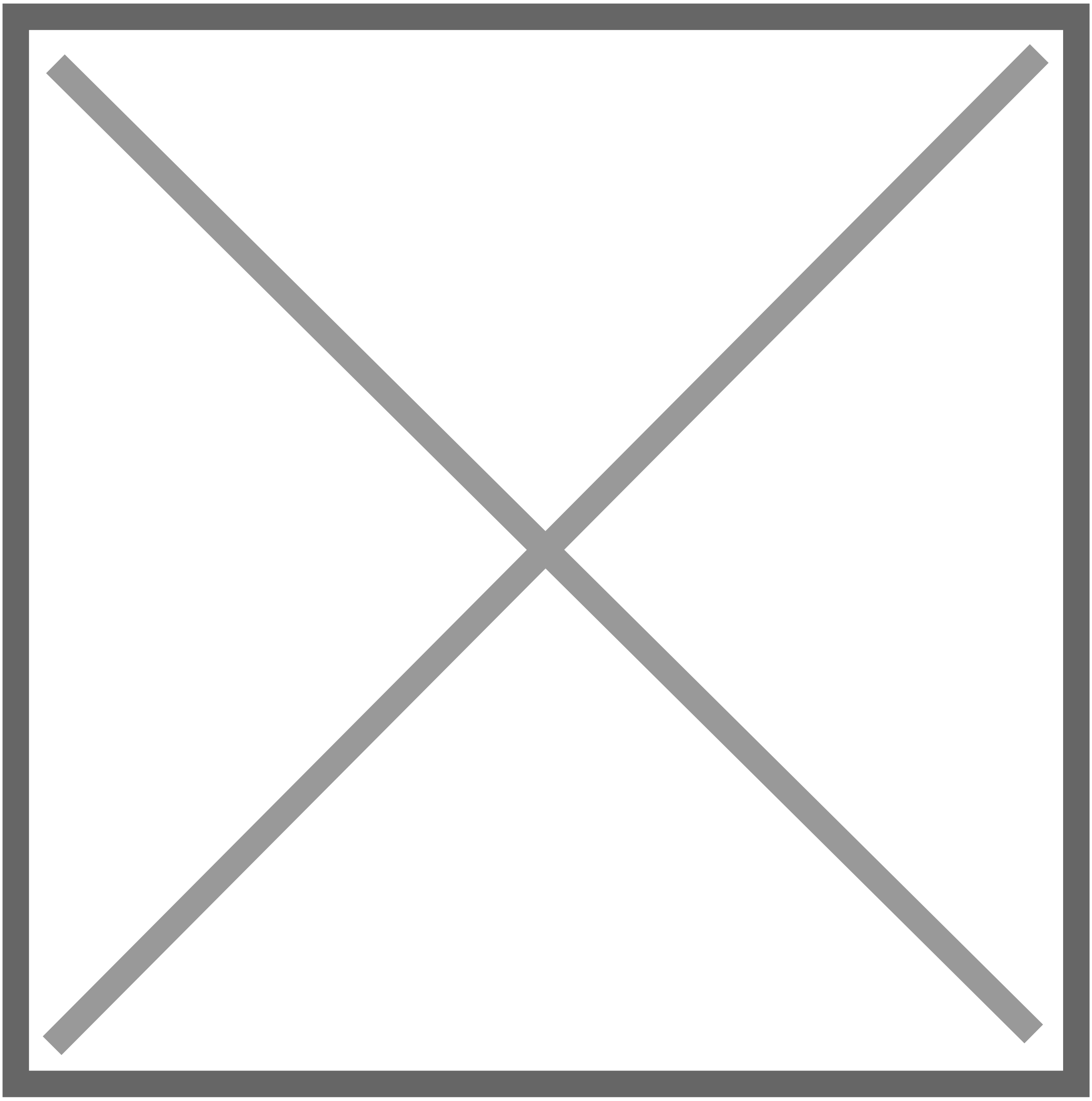
- **Compose Email** – Draft and send an email to the company directly from the system.



# Company’s History Management

This menu allows users to archive emails, view a summary of activity, or apply filters to refine historical data.Navigate to a detailed view of a record to view History.

Click to Call statuses, SMS and emails history of a lead would be tracked here.



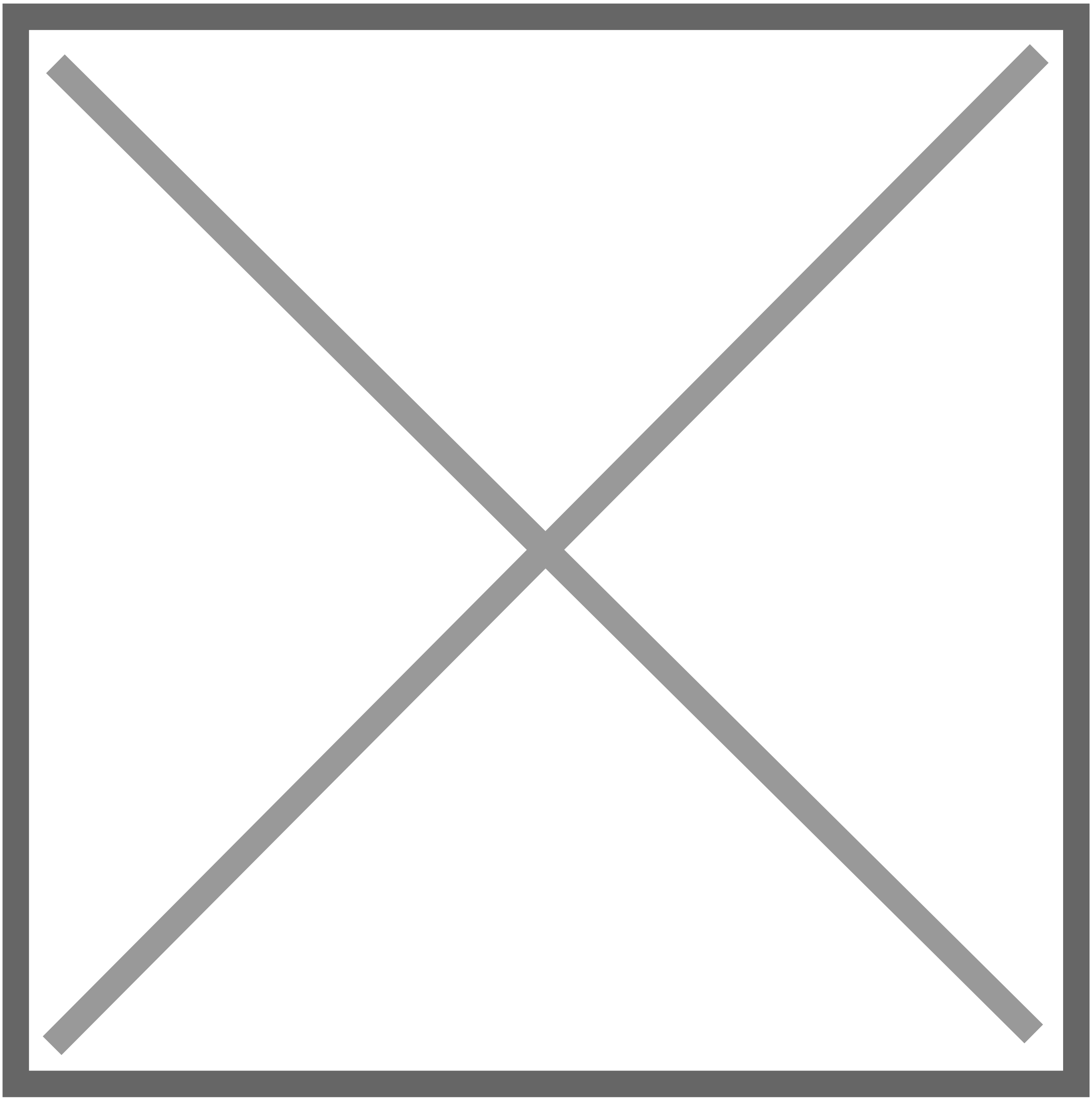
# Submodules

Click on detailed view of a records to and navigate to submodules:

**Documents**

The Documents submodule stores and organizes all files related to the company, such as contracts, proposals, and reference materials, enabling easy access and centralized document management.

Can create a new or select from an existing list.



**Contacts**

The Contacts submodule lists all individuals linked to the company, showing their roles, contact details, and interaction history, making it easy to manage relationships and communication.

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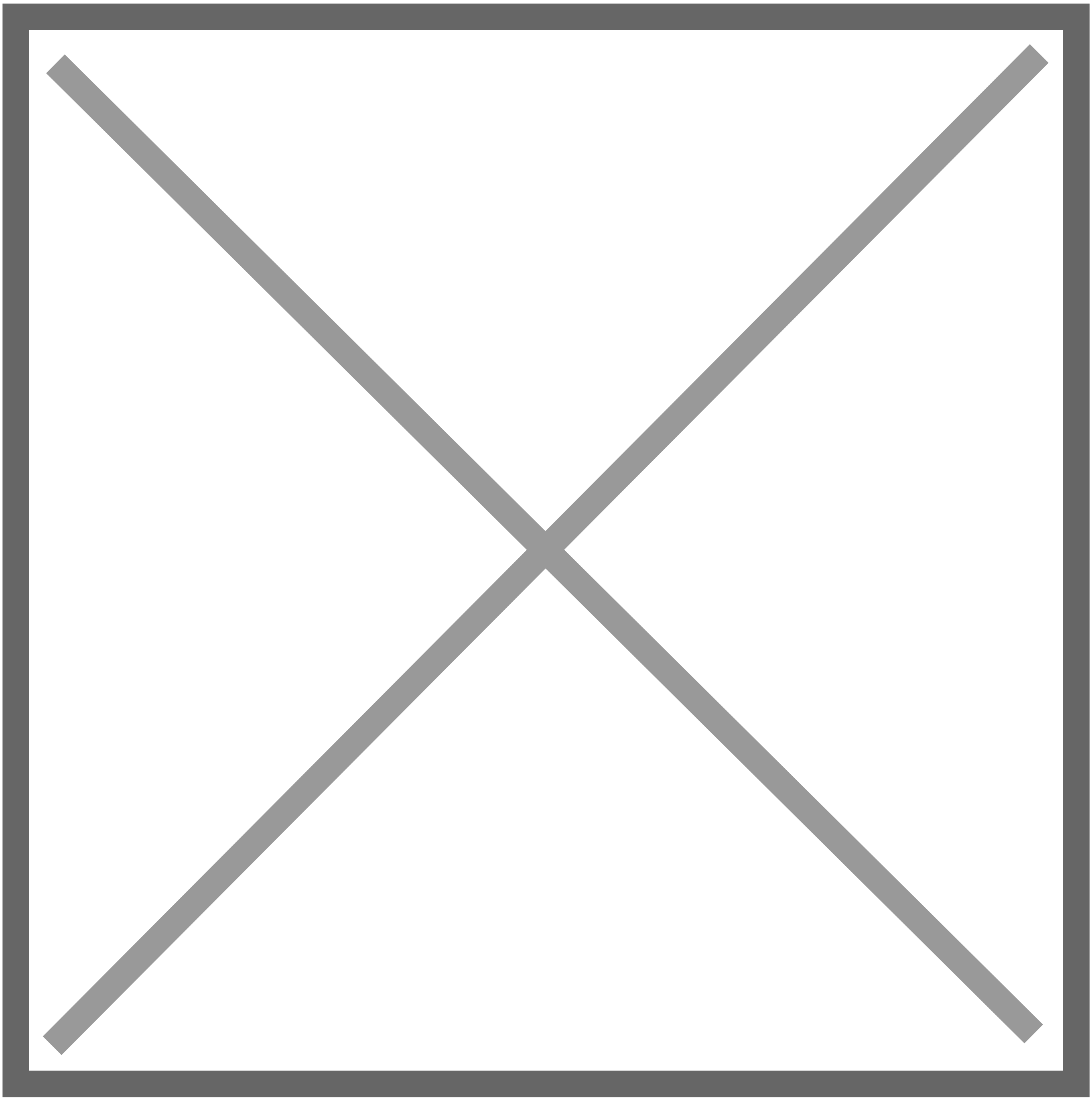

**Opportunities**

The Opportunities submodule tracks all potential deals and sales pipelines associated with the company, helping teams monitor progress, forecast revenue, and drive conversions.

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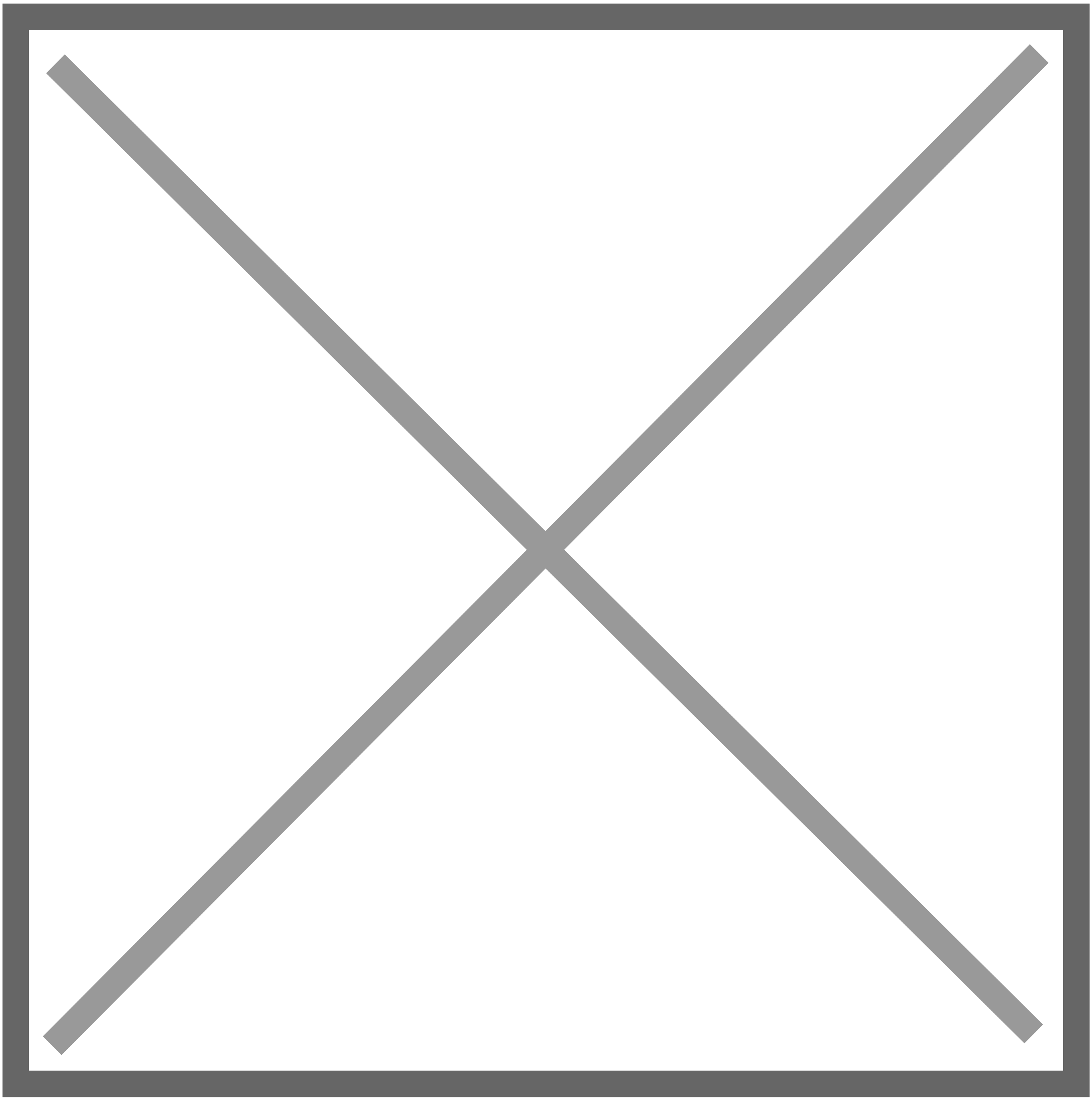
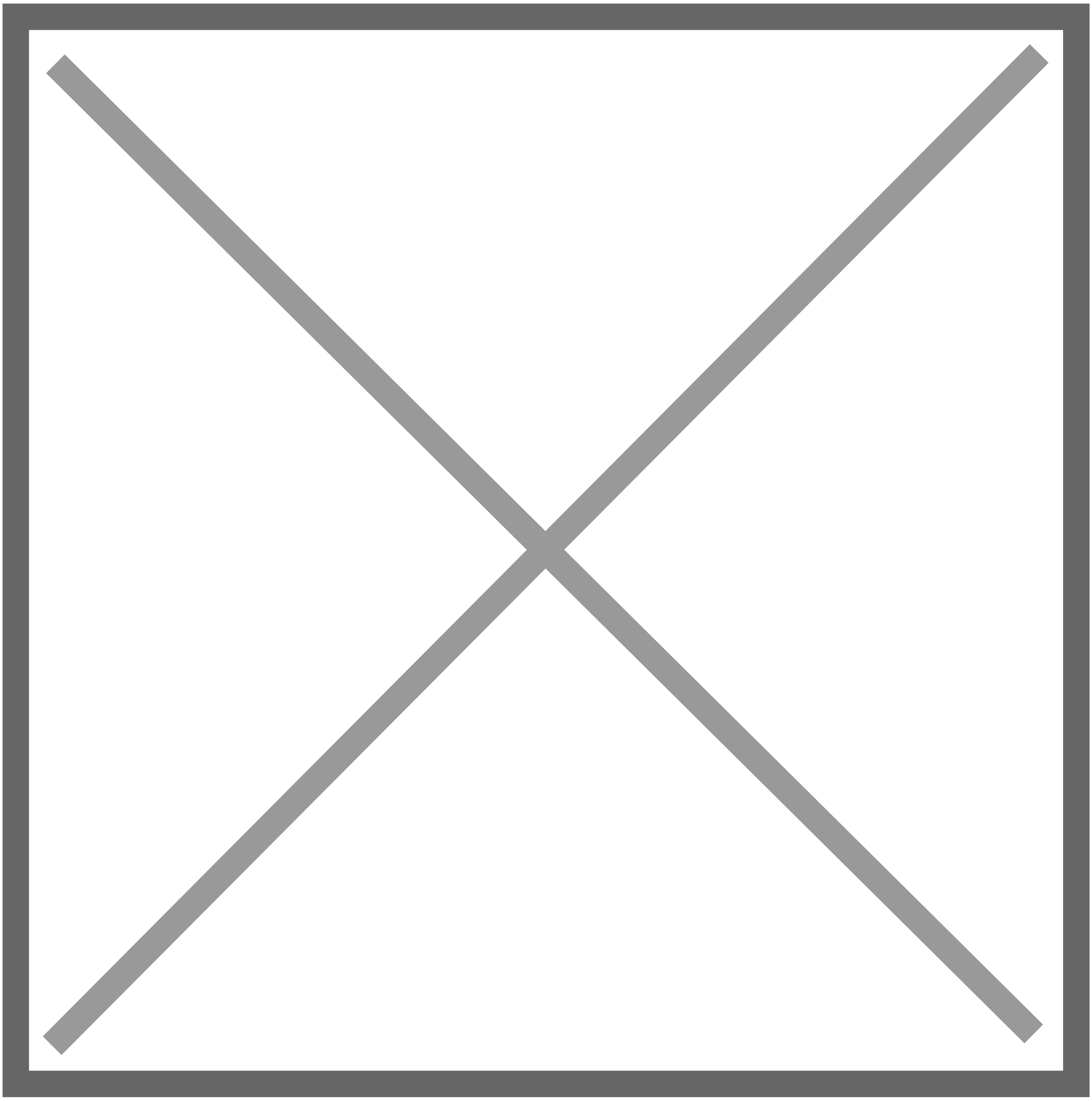


**Campaigns**

The Campaigns submodule under a company helps manage and track marketing campaigns. It allows for the creation, budgeting, execution, and analysis of campaigns, ensuring effective targeting and measurement of results across various channels.



**Leads**

The Leads submodule under a company focuses on managing potential customer leads. It helps capture, track, and nurture leads through the sales funnel. Key features include lead generation, segmentation, follow-up management, and converting leads into opportunities or sales, ensuring an organized and efficient sales process.

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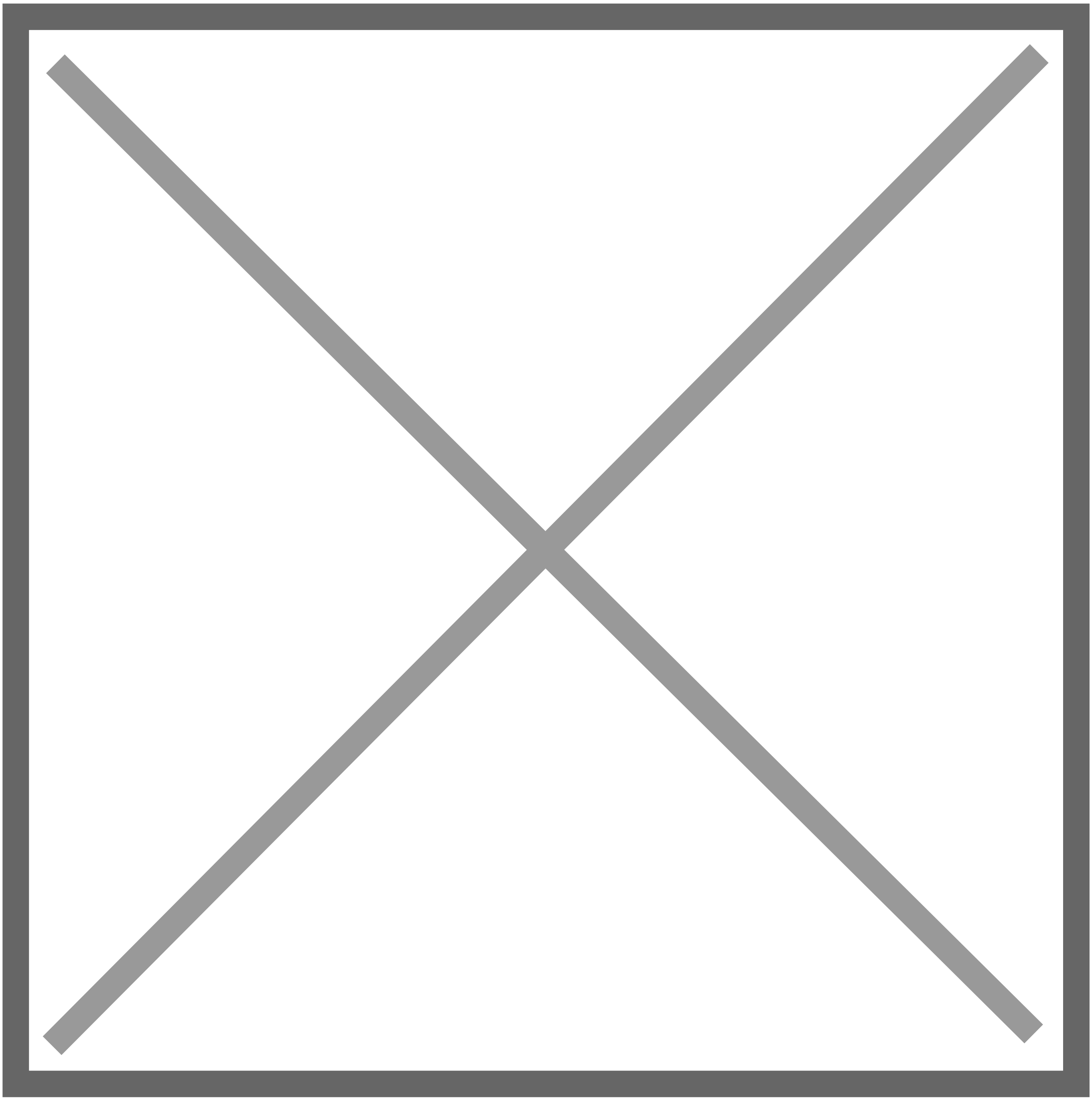

**Member Organizations**

The Member Organizations submodule refers to managing relationships with organizations that are part of a larger network, association, or partnership. It helps track details about each member organization, including contact information, membership status, participation in activities, and any agreements or collaborations. This submodule ensures effective communication, collaboration, and management of the organization's relationships with its members.

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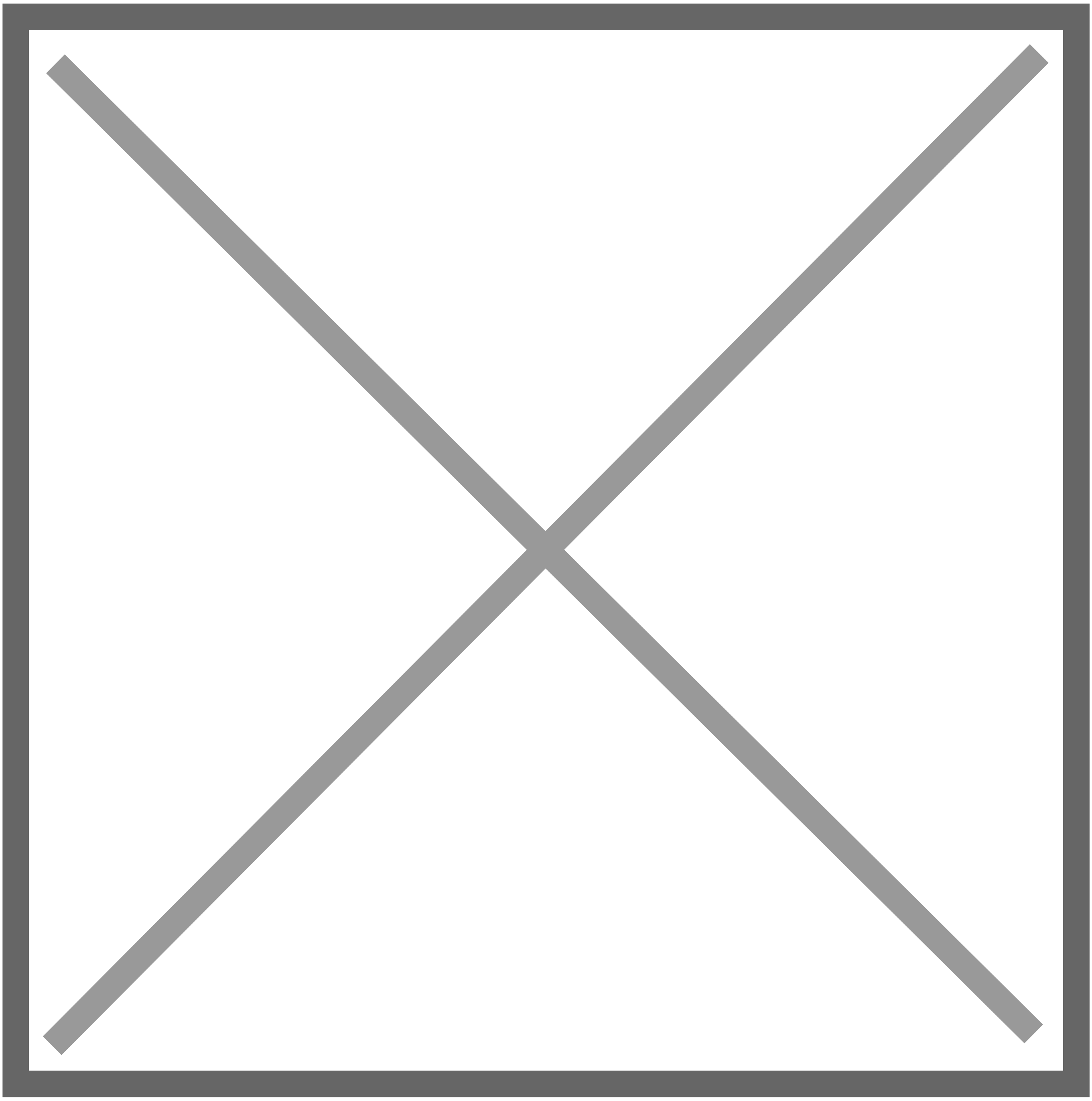

**Cases**

The Cases submodule helps manage customer support requests by tracking, prioritizing, and resolving issues efficiently, ensuring timely responses and customer satisfaction.

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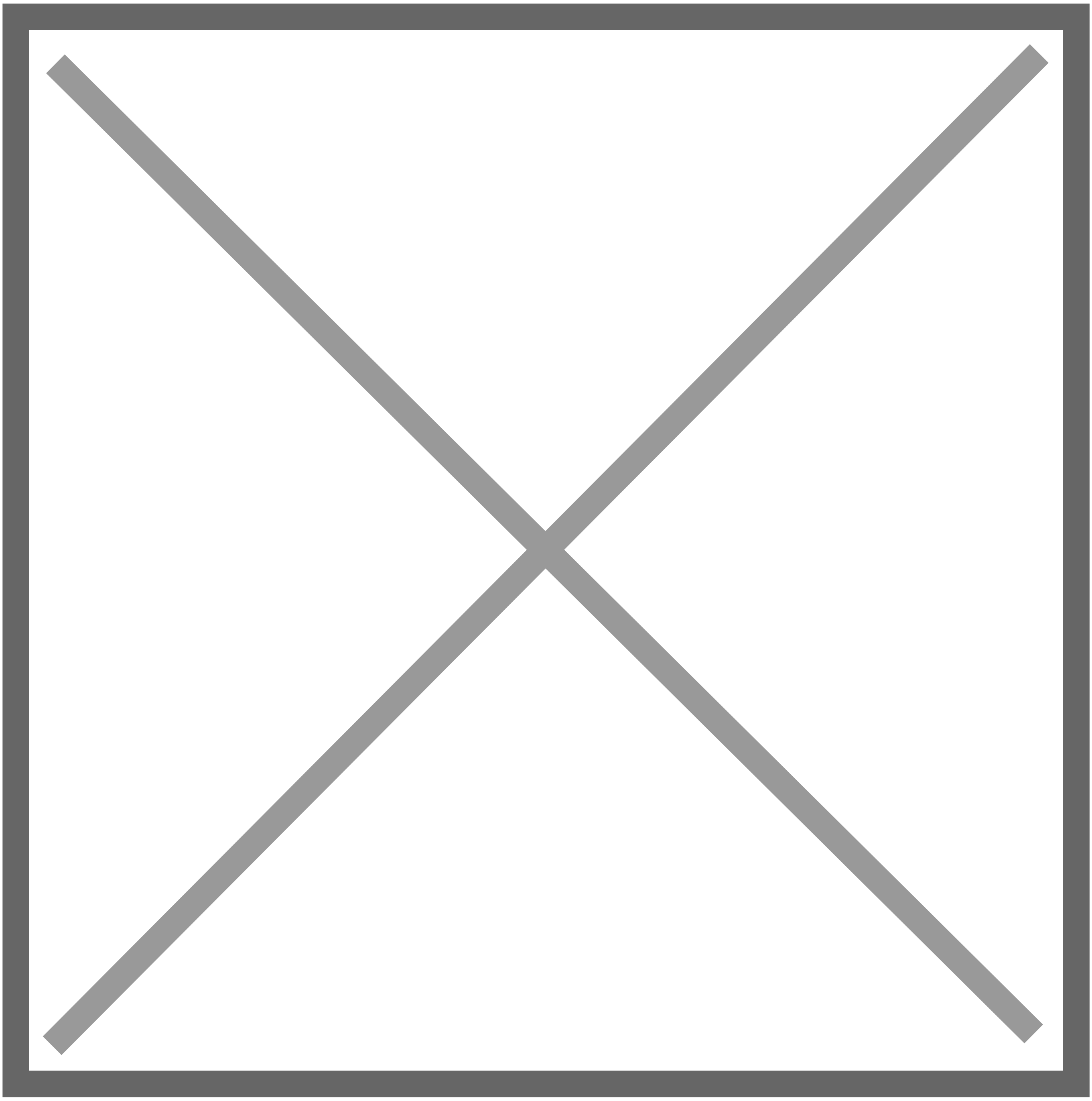

**Quotes**

The Quotes submodule is used to create, manage, and track sales quotes or price estimates provided to potential customers. It typically includes features for generating customized quotes, applying discounts, tracking approval processes, and converting quotes into sales orders once accepted. This submodule ensures streamlined sales processes and accurate pricing.

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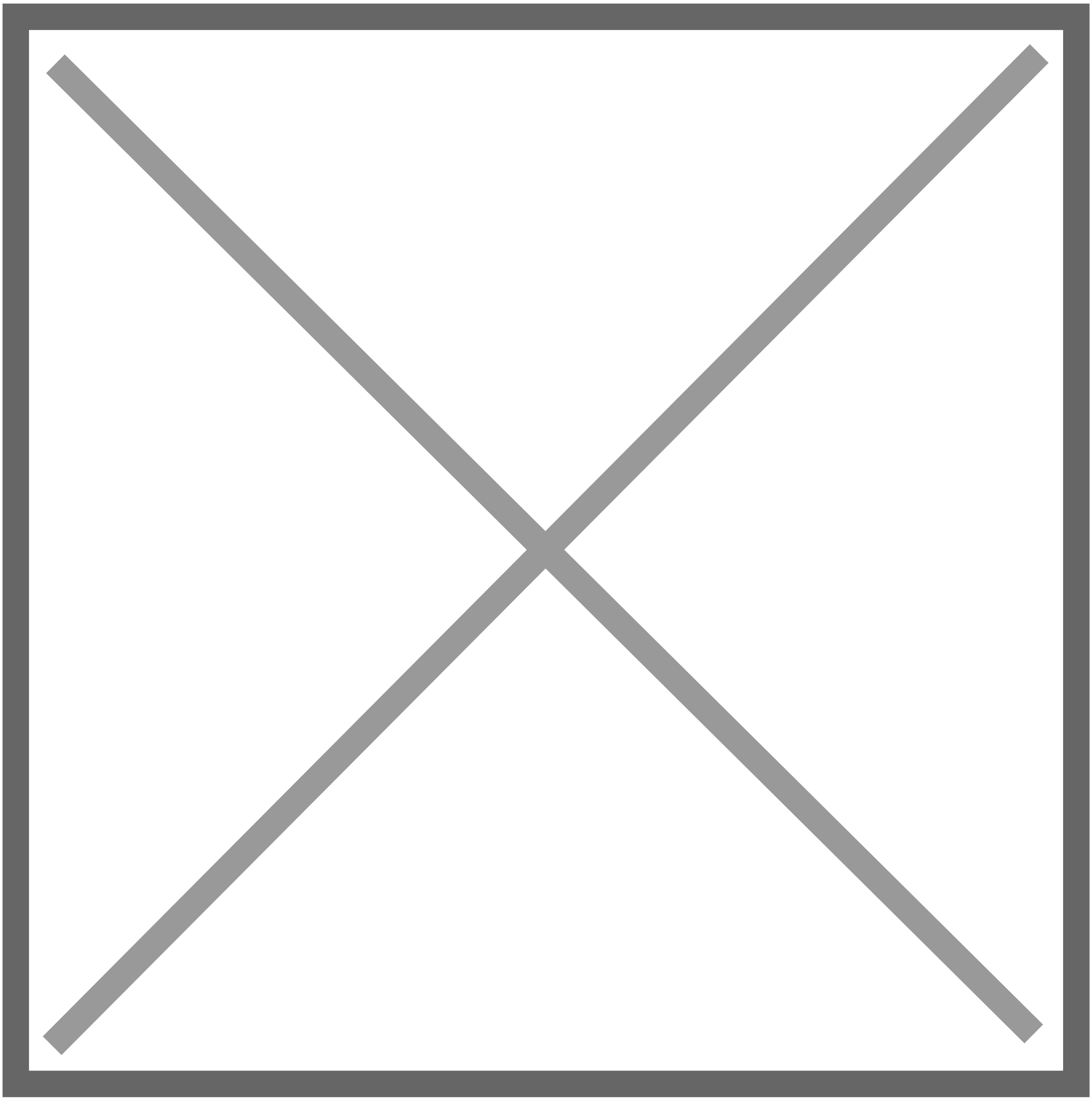

**Invoices**

The Invoices submodule manages the creation, tracking, and processing of company billing. It allows businesses to generate invoices, record payments, monitor outstanding balances, and ensure accurate financial records, supporting efficient revenue collection and accounting.

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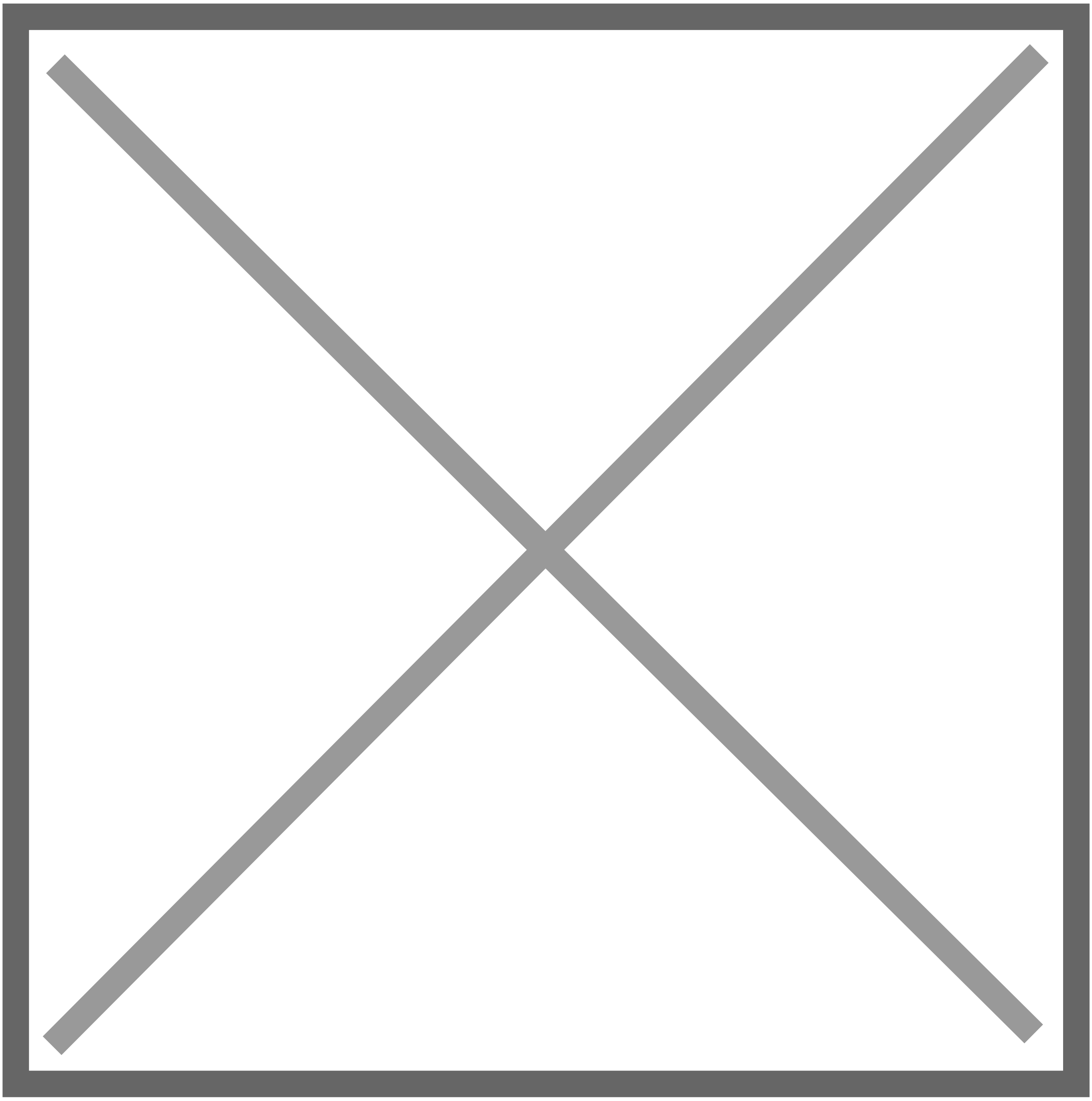

**Contracts**

The Contracts submodule handles the creation, storage, and management of agreements between the company and its clients, vendors, or partners. It ensures key terms, durations, and obligations are tracked, enabling compliance, renewals, and efficient relationship management.

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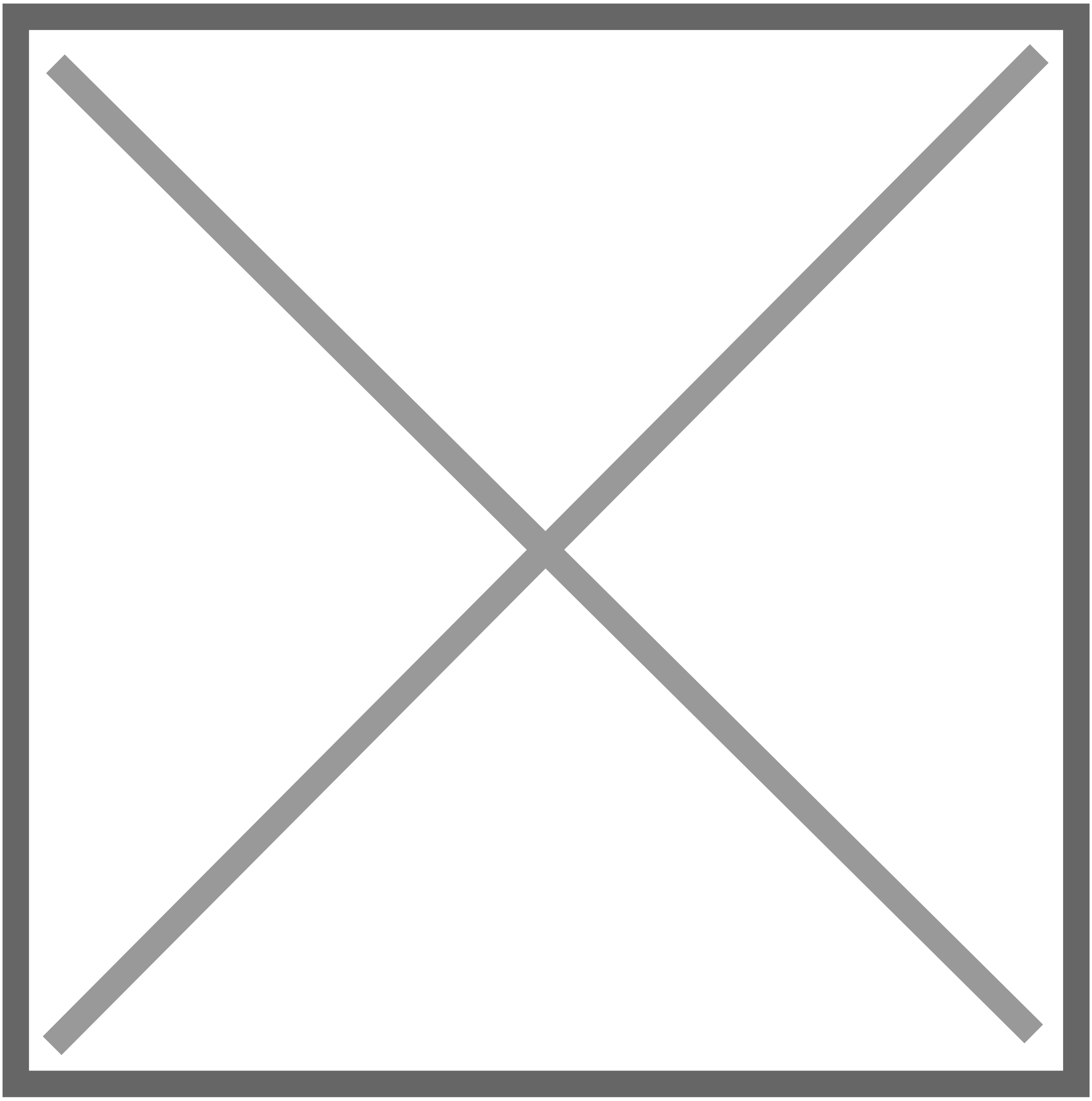
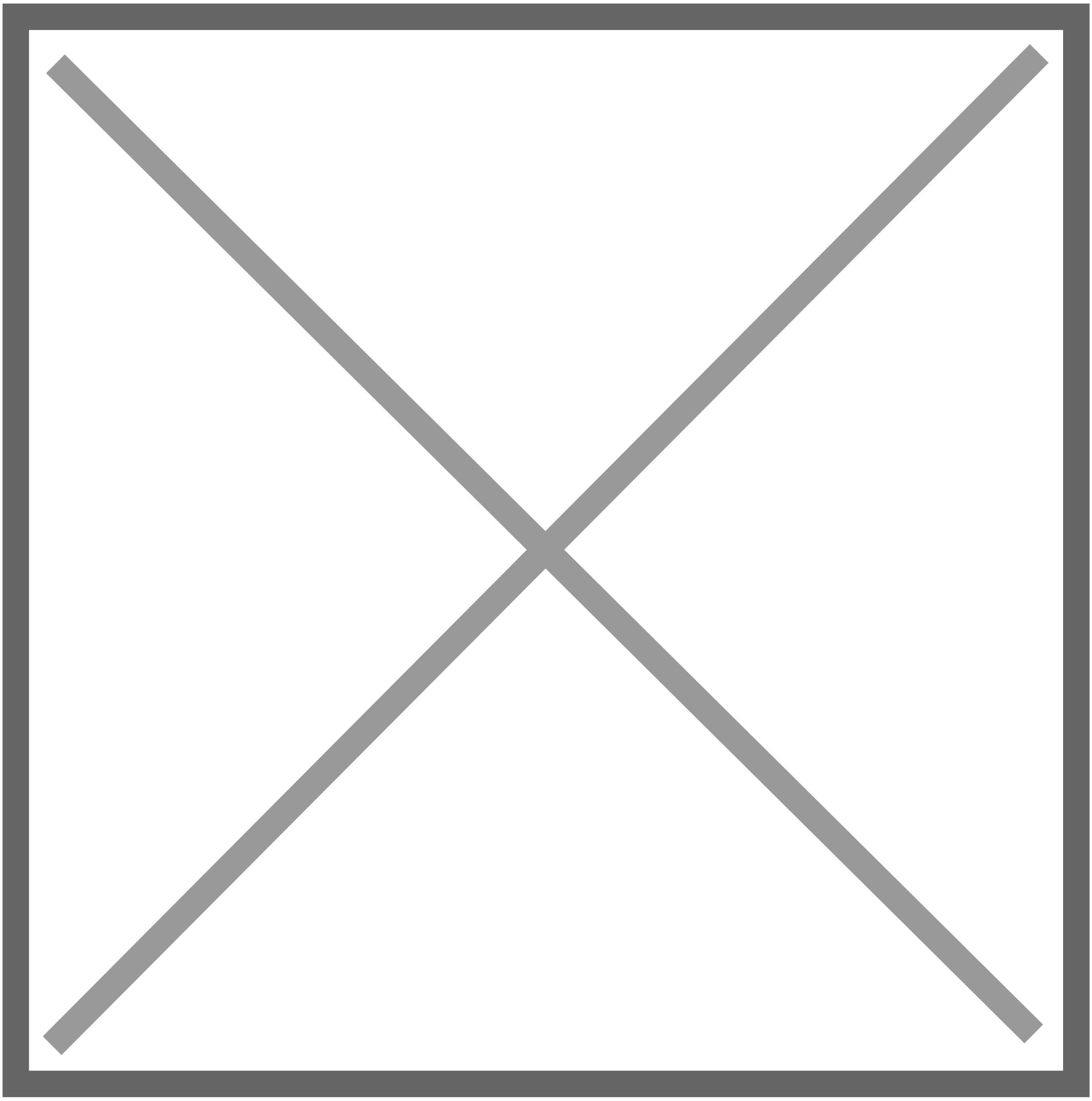


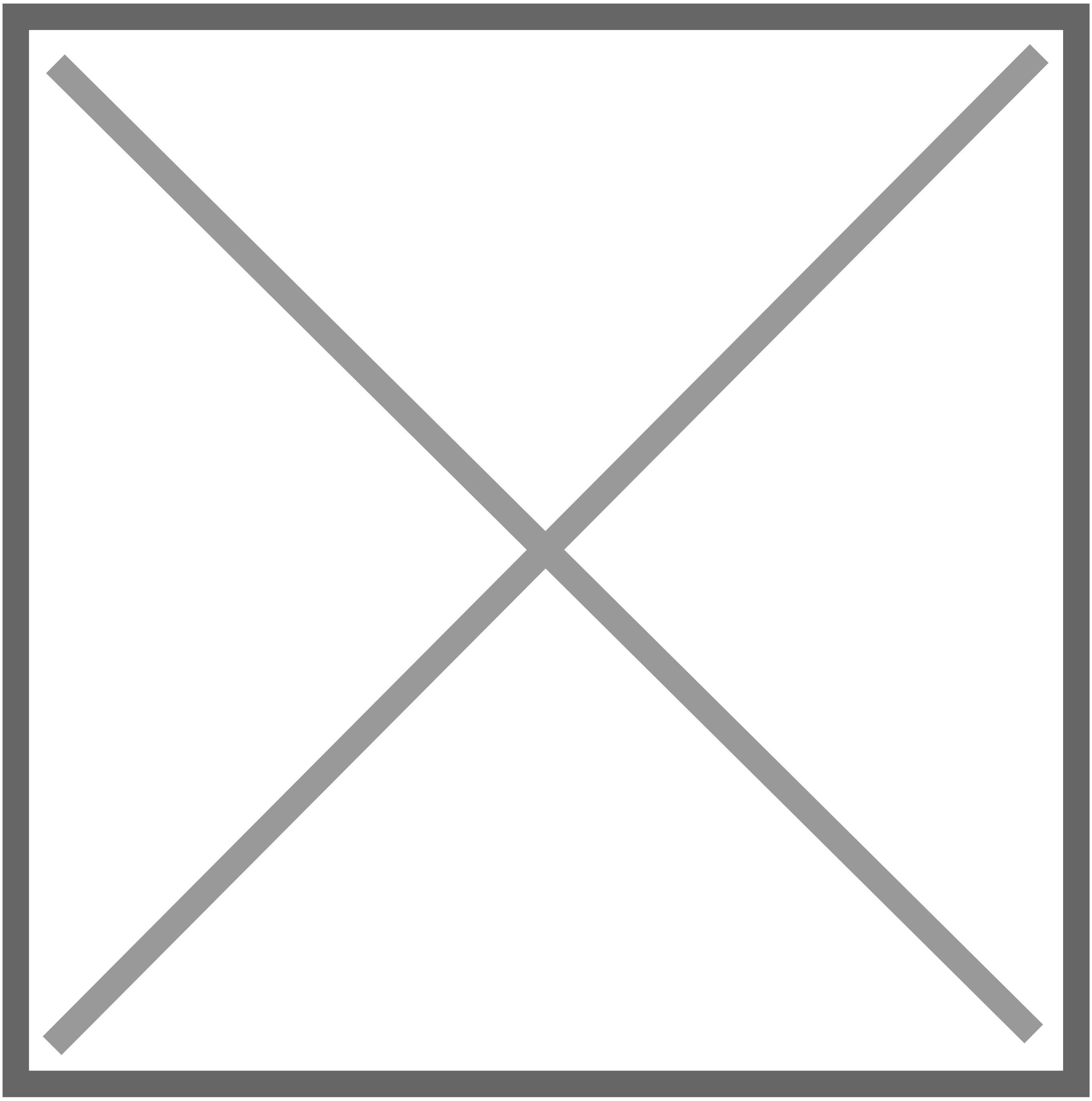
**Products and Services Purchased**

The Products and Services Purchased submodule tracks all goods and services acquired by the company. It records purchase details, such as item descriptions, quantities, prices, and purchase dates, helping manage procurement, budgeting, and inventory efficiently.



**SMS**

The SMS submodule enables the company to track sent messages and communications. It is used for alerts, promotions, reminders, and notifications, supporting direct and timely engagement through mobile messaging.



**Bugs**

The Bugs submodule is used to log, track, and manage software defects or issues reported by users or by company. It helps ensure timely resolution by assigning priorities, statuses, and responsible team members, improving software quality and project transparency.

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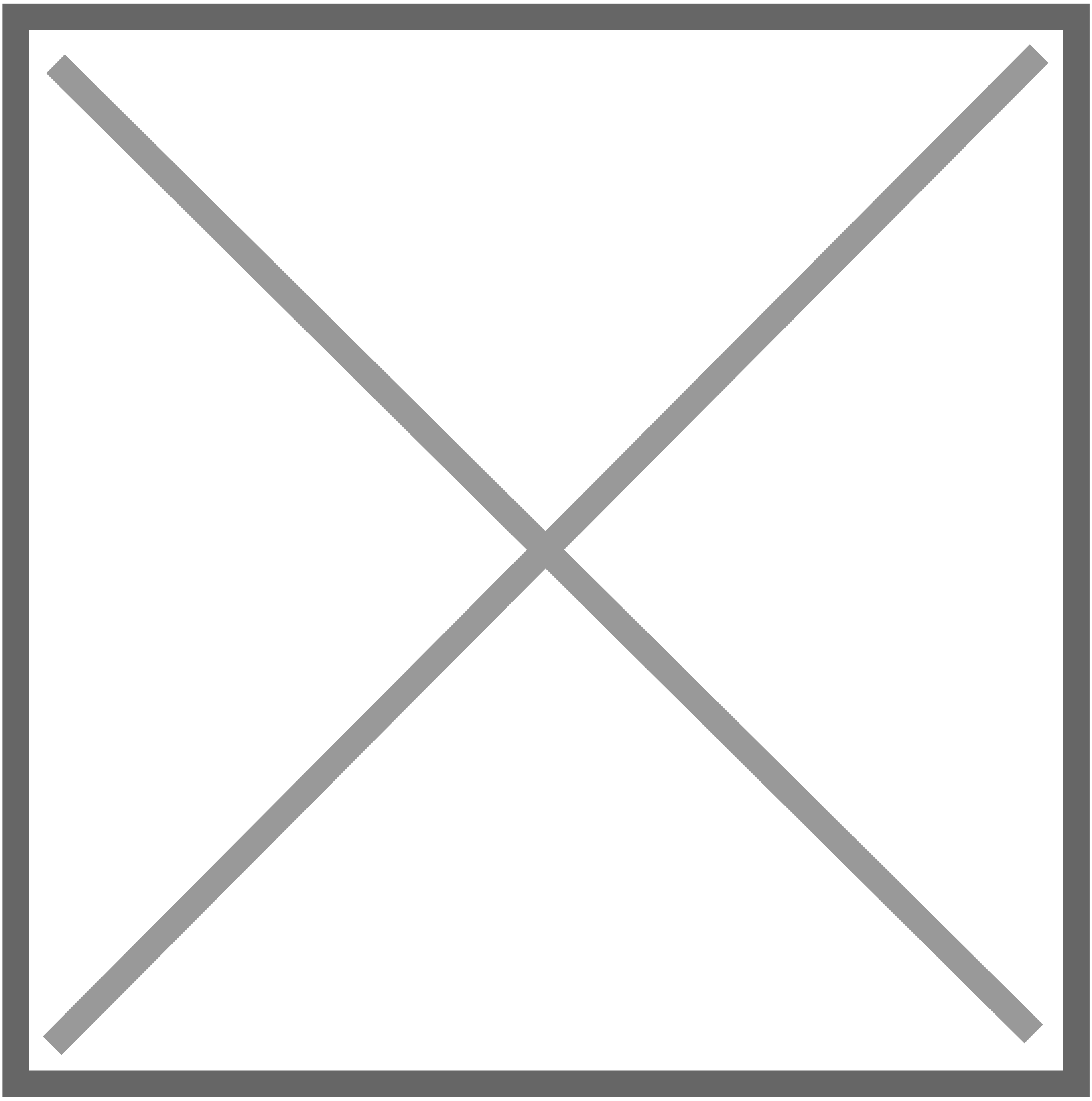

**Projects**

The Projects submodule is designed to plan, execute, and monitor company projects. It allows for task assignment, timeline tracking, resource allocation, and progress monitoring, ensuring projects are delivered on time, within scope, and on budget.

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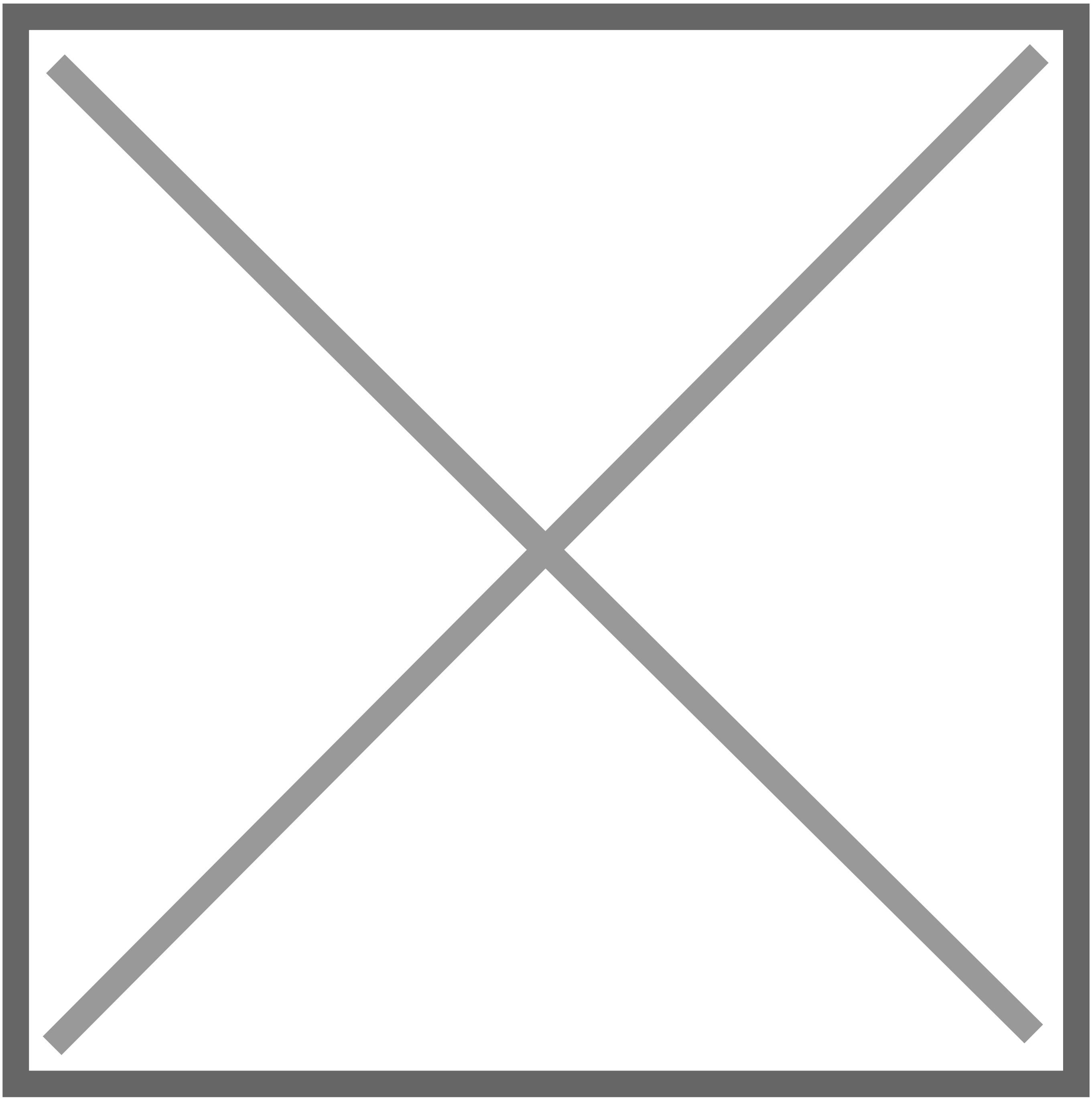
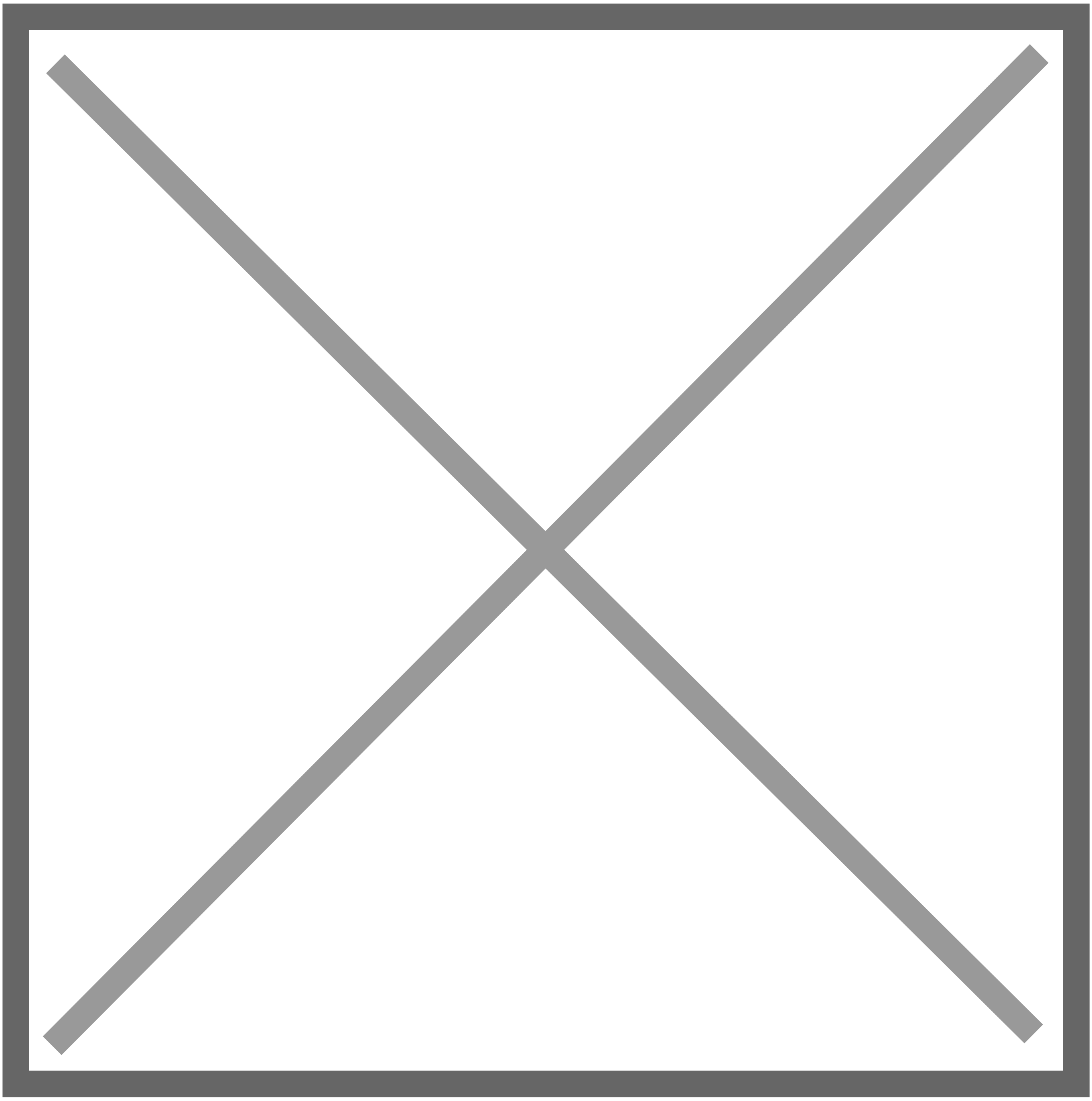


**Security Groups**

The Security Groups submodule manages user access and permissions within the system. It allows administrators to group users based on roles and assign specific access rights, ensuring data security, compliance, and controlled access to sensitive information.

When a user is created, a security group creates a default with the user name and it is assigned to the records by default to track which user created the records.

Can select from an existing list.



**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 #11
Created 10 May 2025 08:48:48 by Admin
Updated 22 May 2025 09:55:40 by Admin