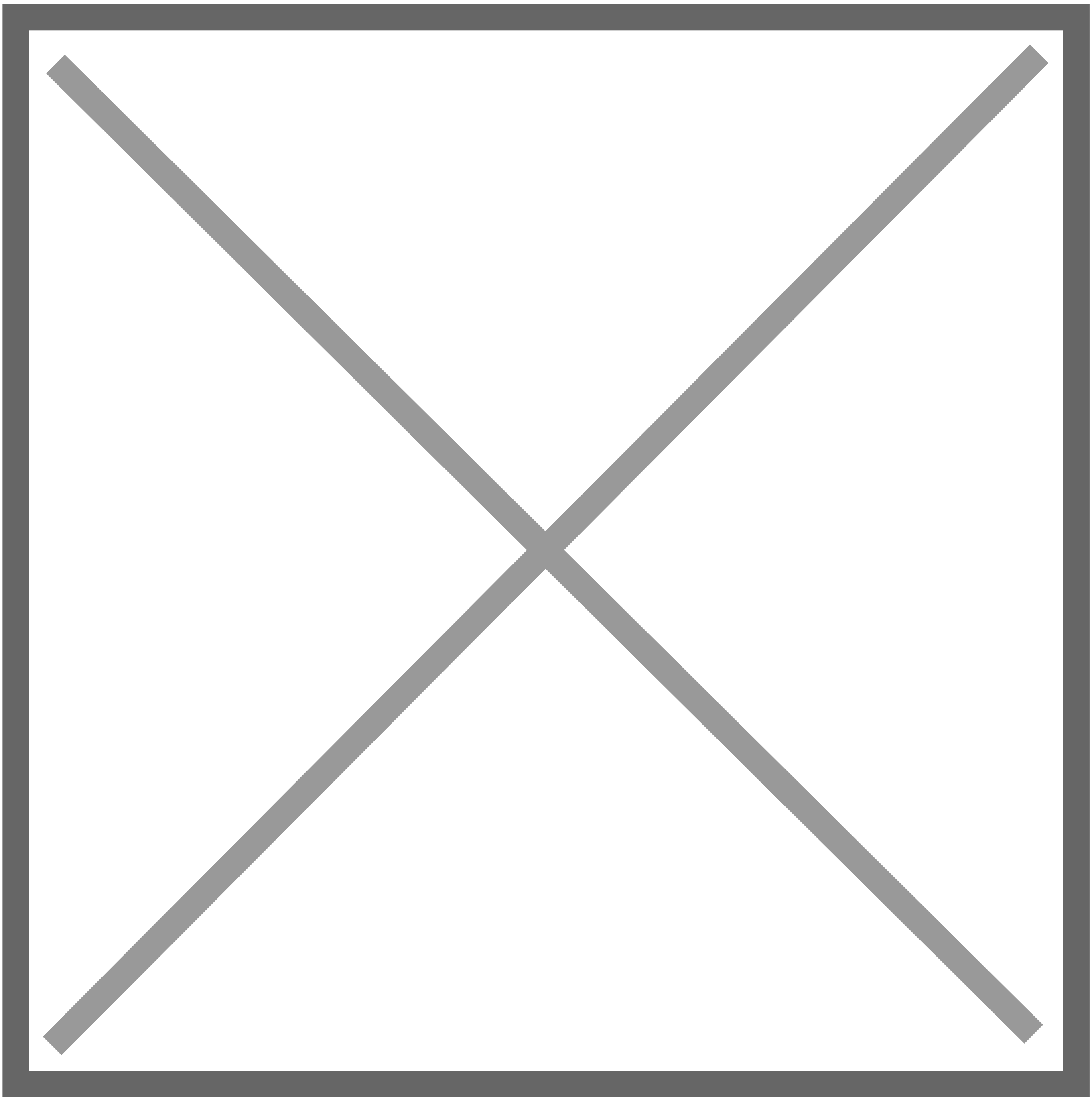
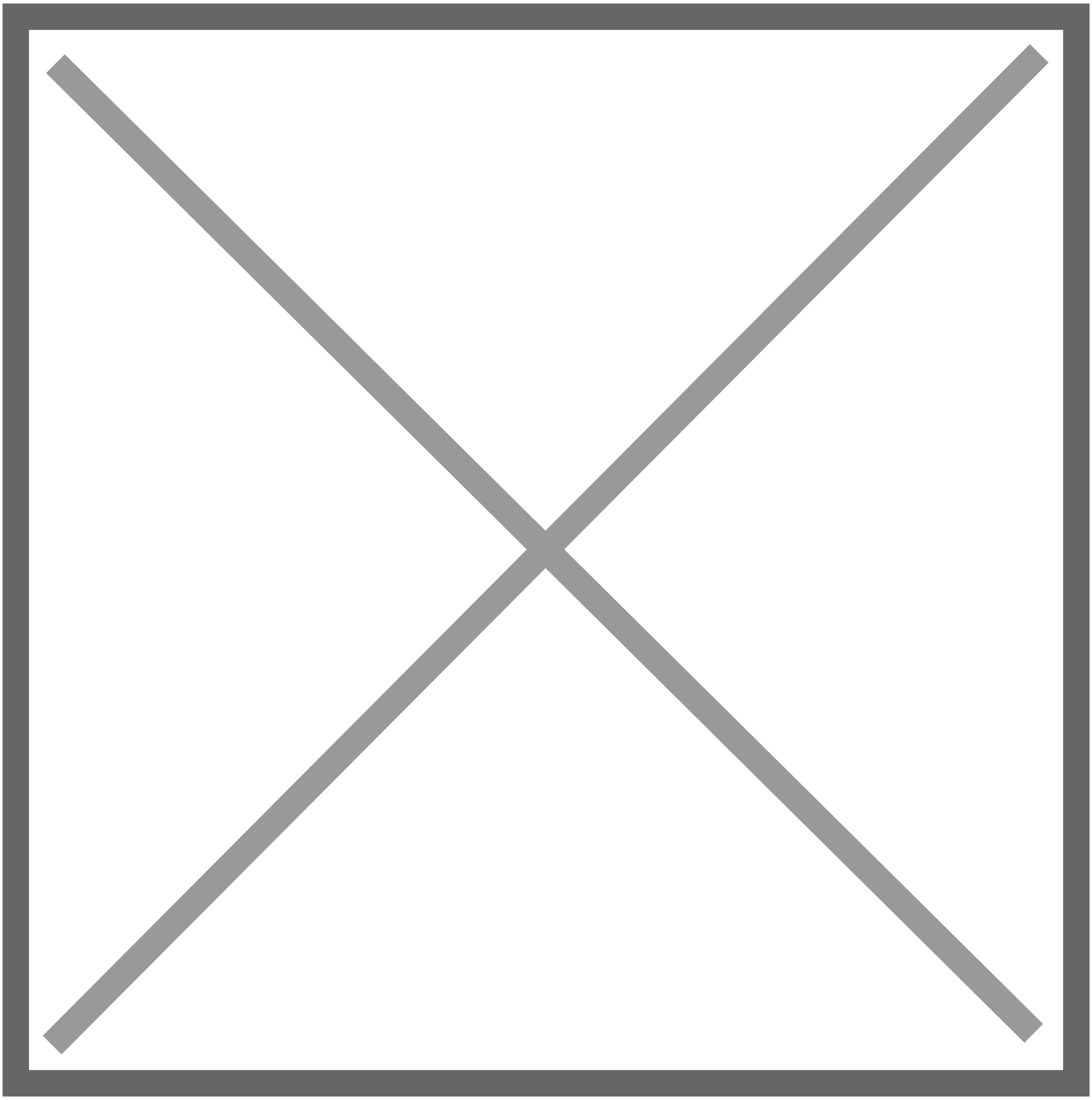
Contacts

In **KiyoCRM** a Contact is an individual who is typically associated with a Company (organization) or Opportunity (qualified prospect). For example, if Techco is the Company, then John Smith, Sales Manager of Techco is the Contact. This module holds all information relating to these individuals and also provides a vantage point for any history relating to a Contact record, for example if they were involved in a Meeting, raised a Case or sent an Email.



List View Actions

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



- **Create Contact** – A new form is opened in Edit View to allow you to create a new Contact record.
- **View Contacts** – Redirects you to the List View for the Contacts module. This allows you to search and list Contact records.
- **Import Contacts** – Redirects you to the Import Wizard for the Contacts module.
- **Kanban View** – Visual workflow by Contacts title (Mr., Ms., Mrs.)

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 in the side nav bar as **My Filters**
- **Favourite** records of contacts 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 favourites list.)
- **Column Choose**r — The Column Chooser allows you to customize which columns are displayed in the list view by showing or hiding specific fields.

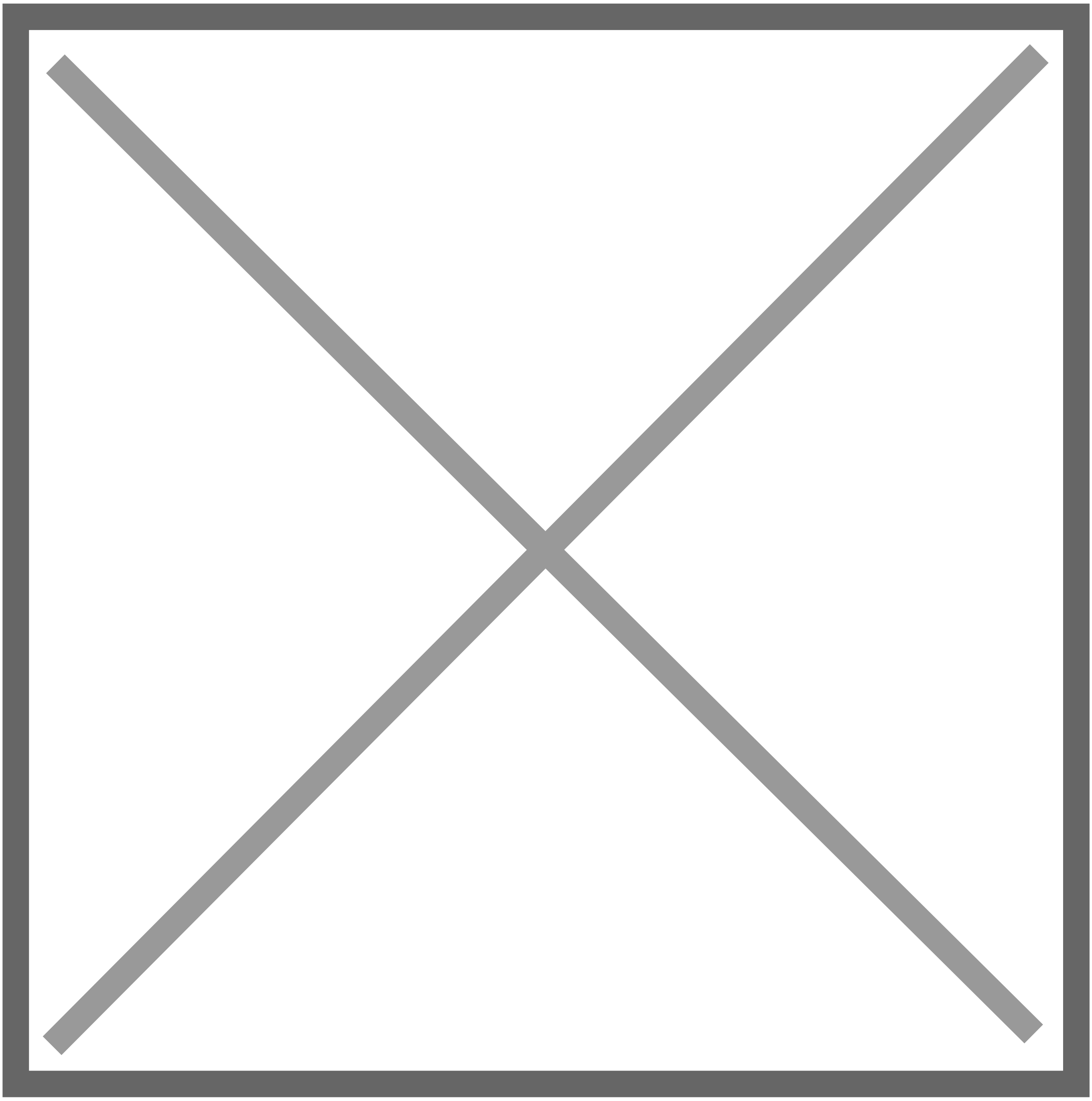
Note: Refer Leads module Column Chooser.

- To sort records on the Contacts List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Contact, Use Search engine on top
- Clicking on the pencil icon Contacts list view page to the display of record edit view.

Bulk Actions of Contacts

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

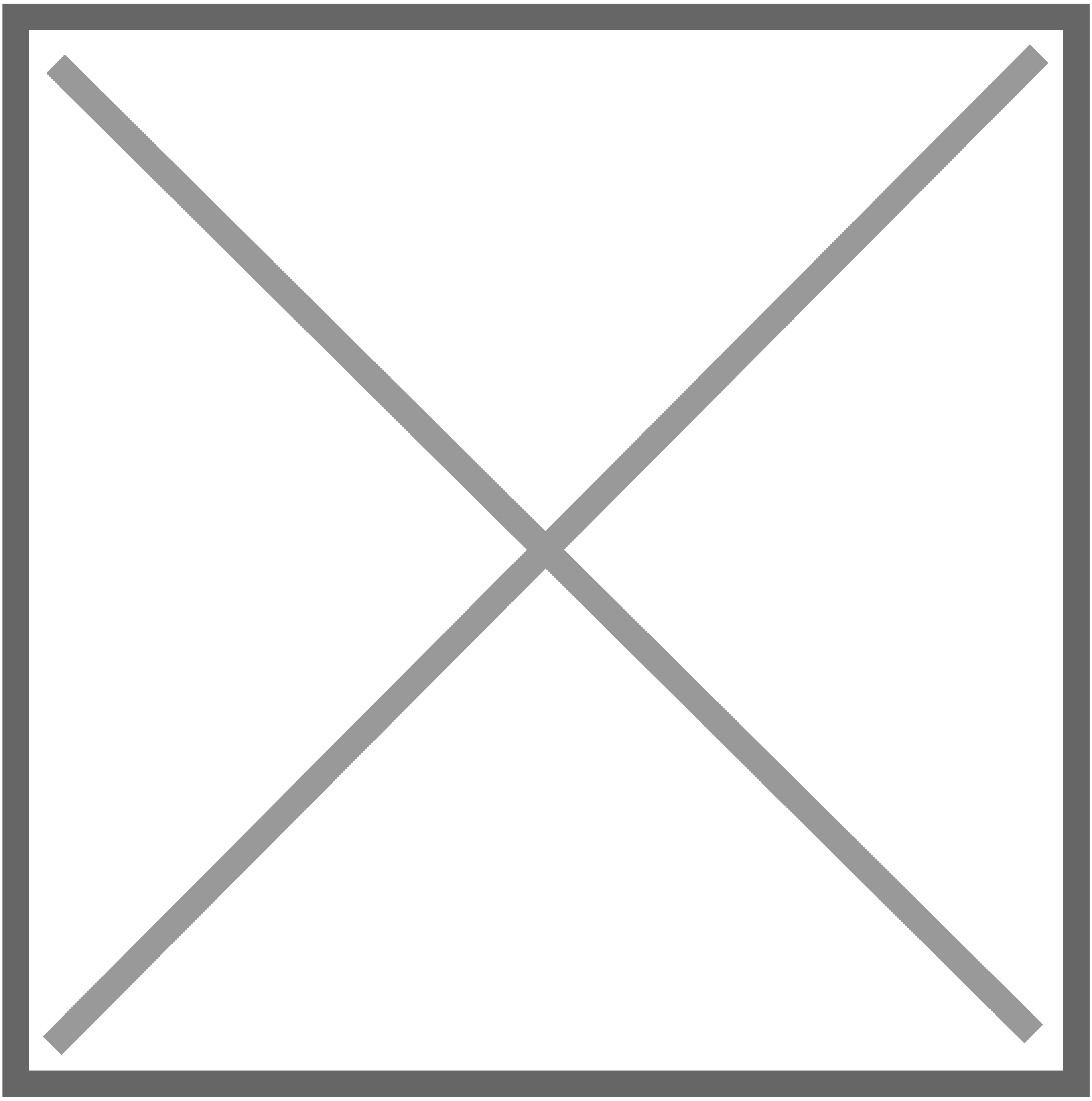
- **Email:** Send an email to the selected contacts directly.
- **Mass Update**: Apply changes to multiple contact records at once.
- **Merge**: Combine duplicate or similar contact records into one.
- **Add to Target List:** Add selected contacts to a marketing or campaign list.
- **Print as PDF**: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



Customer One view

The Customer One View provides a consolidated, real-time snapshot of a customer's interactions, transactions, and engagement across the system. This interface is designed for quick decision-making and streamlined customer management.

Click on eye icon in list view to open the Customer one view

???? Profile Section

- **Customer Name & Initials**: Displayed prominently with initials inside a circle.
- **Rating Stars:** Visual representation of customer priority or satisfaction (e.g., 3 out of 5 stars).

  Contact Actions

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

- **Basic Info**: Includes phone number, email, 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 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

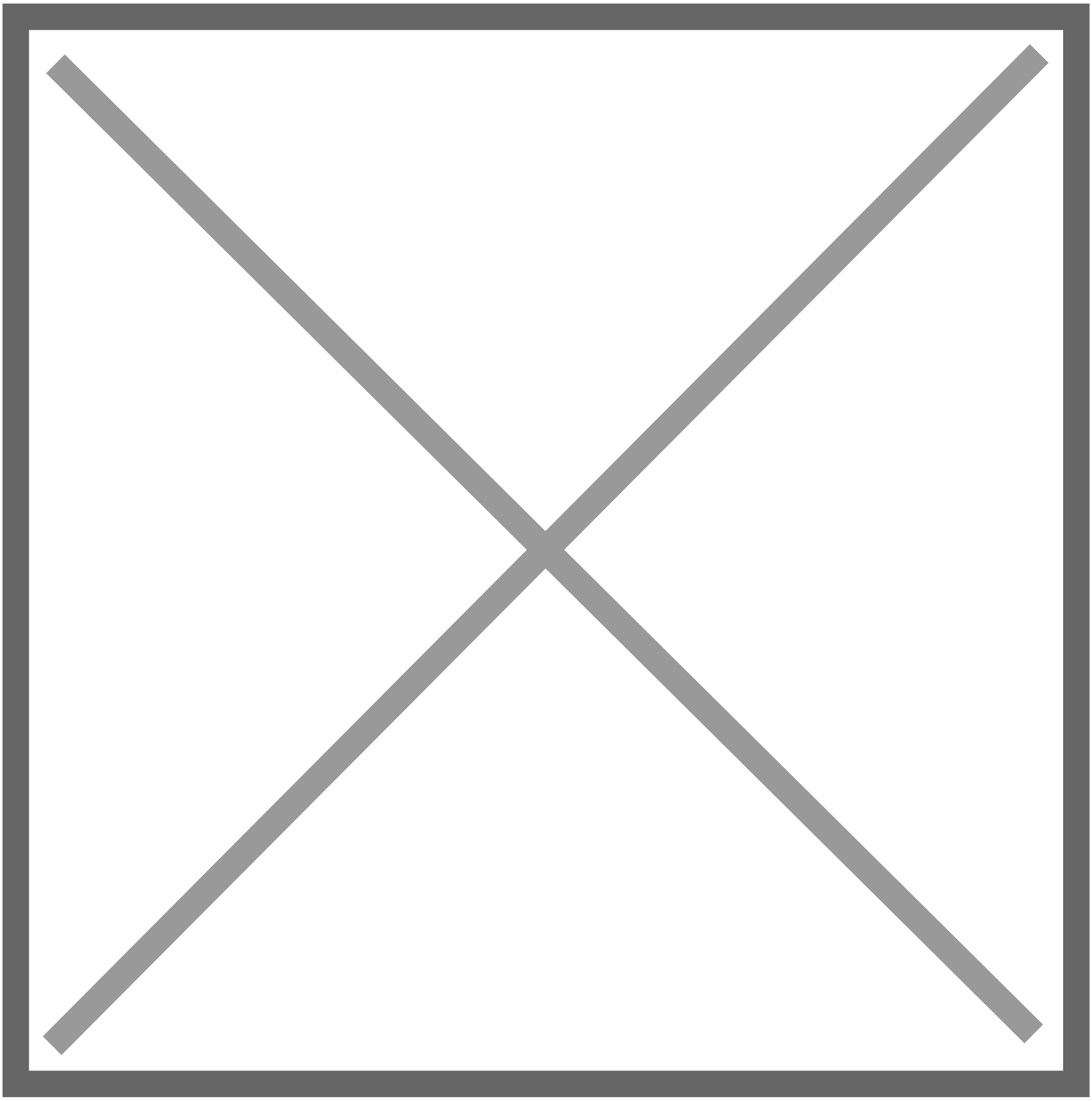
Note: If no data is available, the field displays None or 0.

? Quick Actions

- **Create Case**: Instantly open a support or service ticket.
- **Create Opportunity**: Initiate a new sales process from the customer profile.

? Close Button

- Closes the one-view screen and returns to the previous interface.

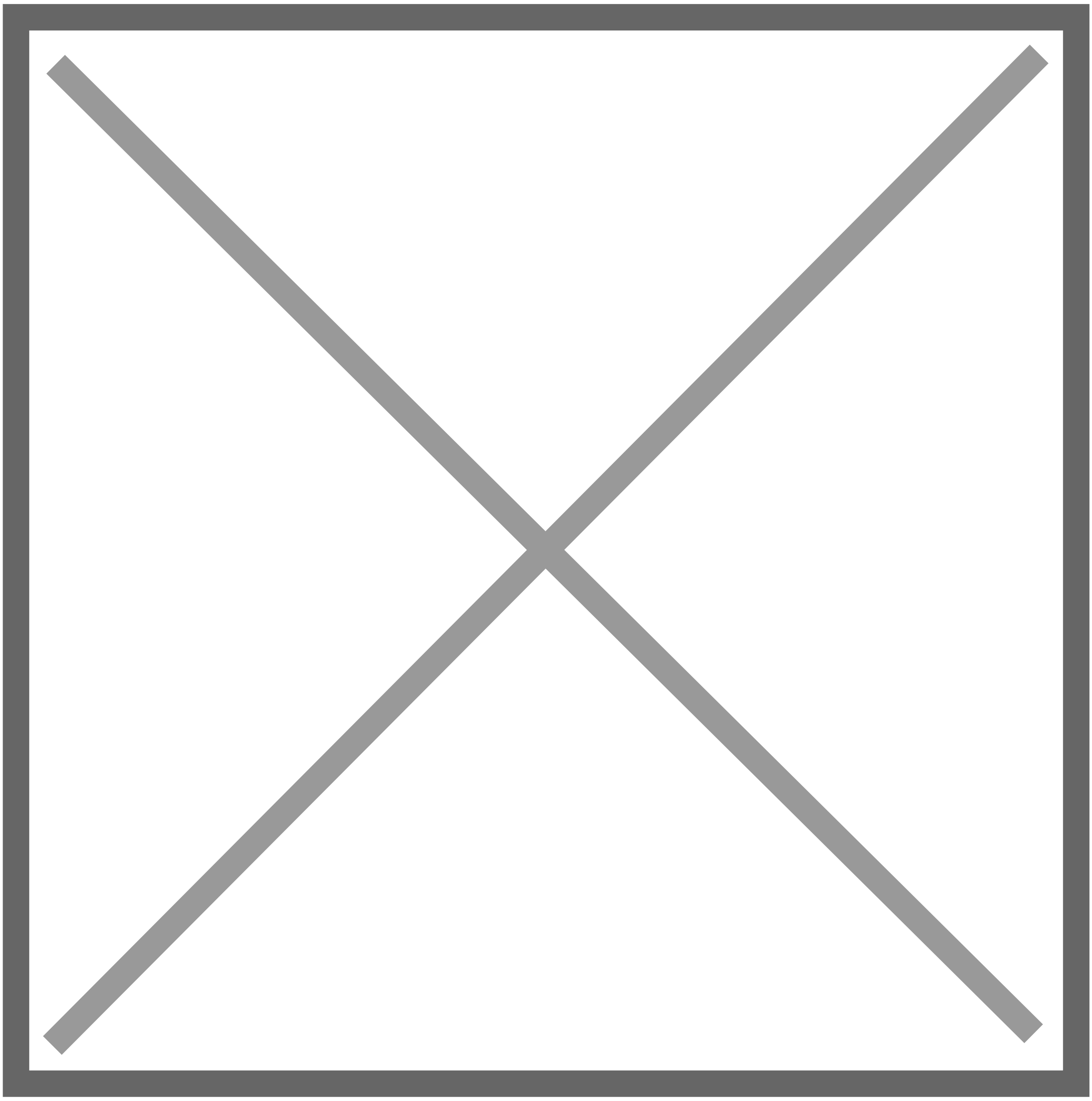


Contact’s Detail view Actions

The Contacts Detail View in KiyoCRM provides a comprehensive snapshot of an individual contact's information. This includes personal details, communication history, activity timeline, associated companies, tasks, and notes. From this centralized interface, users can access essential tools and perform actions related to the contact, ensuring efficient management and seamless engagement.

To view Contacts detail view, click on the Name in list view.

- **Edit** – Modify the contact's existing information.
- **Duplicate** – Create a new contact by copying current contact details.
- **Delete** – Permanently remove the contact from the system.
- **Find Duplicate** – Scan and identify possible duplicate contact entries.
- **Manage Subscriptions** – Control the contact's email preferences and opt-in/opt-out settings.
- **Print as PDF** – Generate a downloadable PDF version of the contact's details.
- **View Changelog** – Review the history of changes made to this contact.
- **Send Welcome Email** – Send a predefined welcome message to the contact having customer portal access.
- **Send Reset Password Email** – Trigger a password reset email for portal access.



Contact’s Activities Management

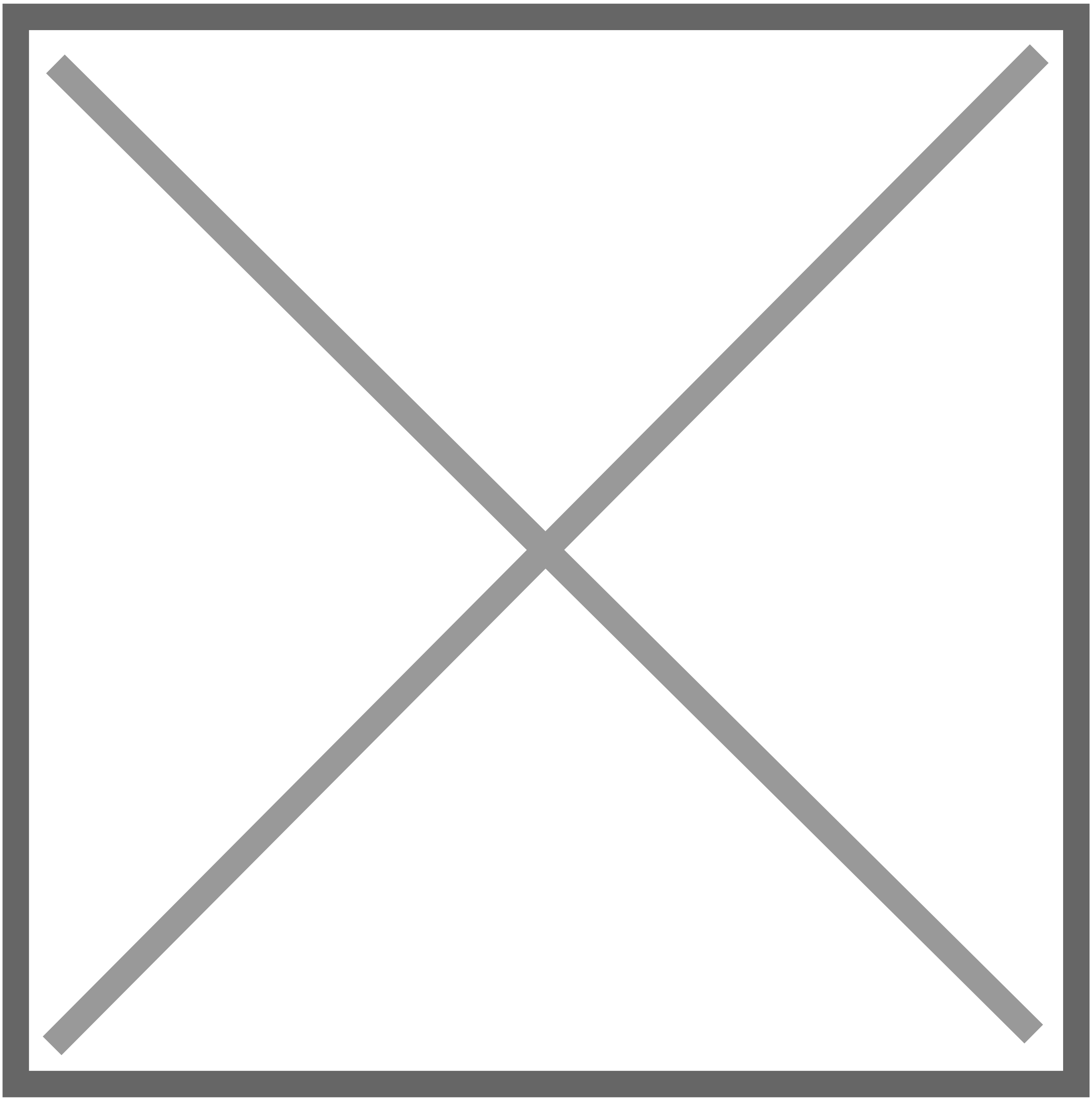
Contact Activity Management allows users to track and manage interactions with a Contact by creating tasks, scheduling meetings, logging calls, or composing emails

All actions (emails sent, updates, etc.) are tracked per contact.

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

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

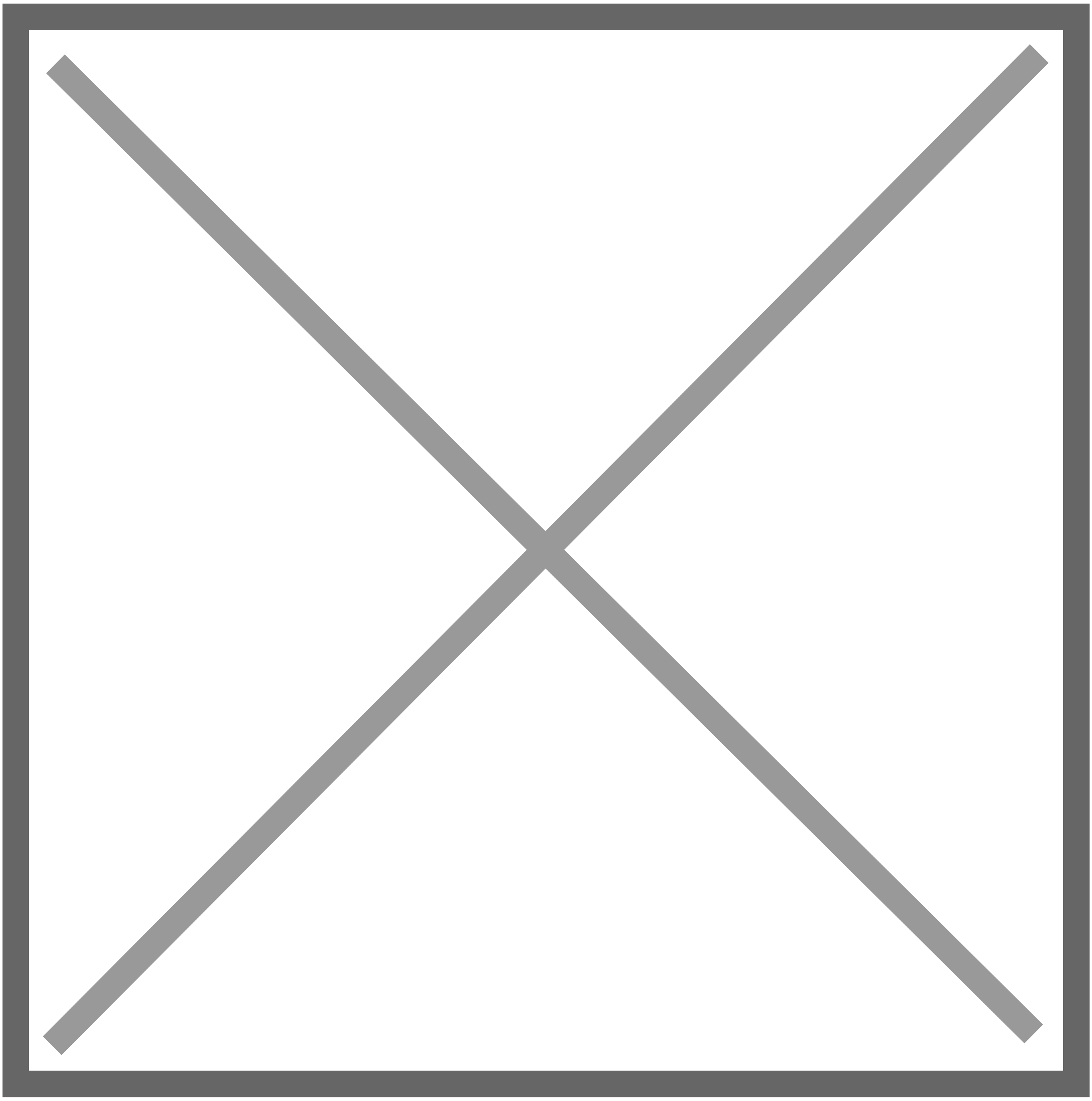
- **Log Call** – Record details of a phone conversation with the contact for future reference.
- **Compose Email** – Draft and send an email to the contact directly from the system'



Contacts History Management

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

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



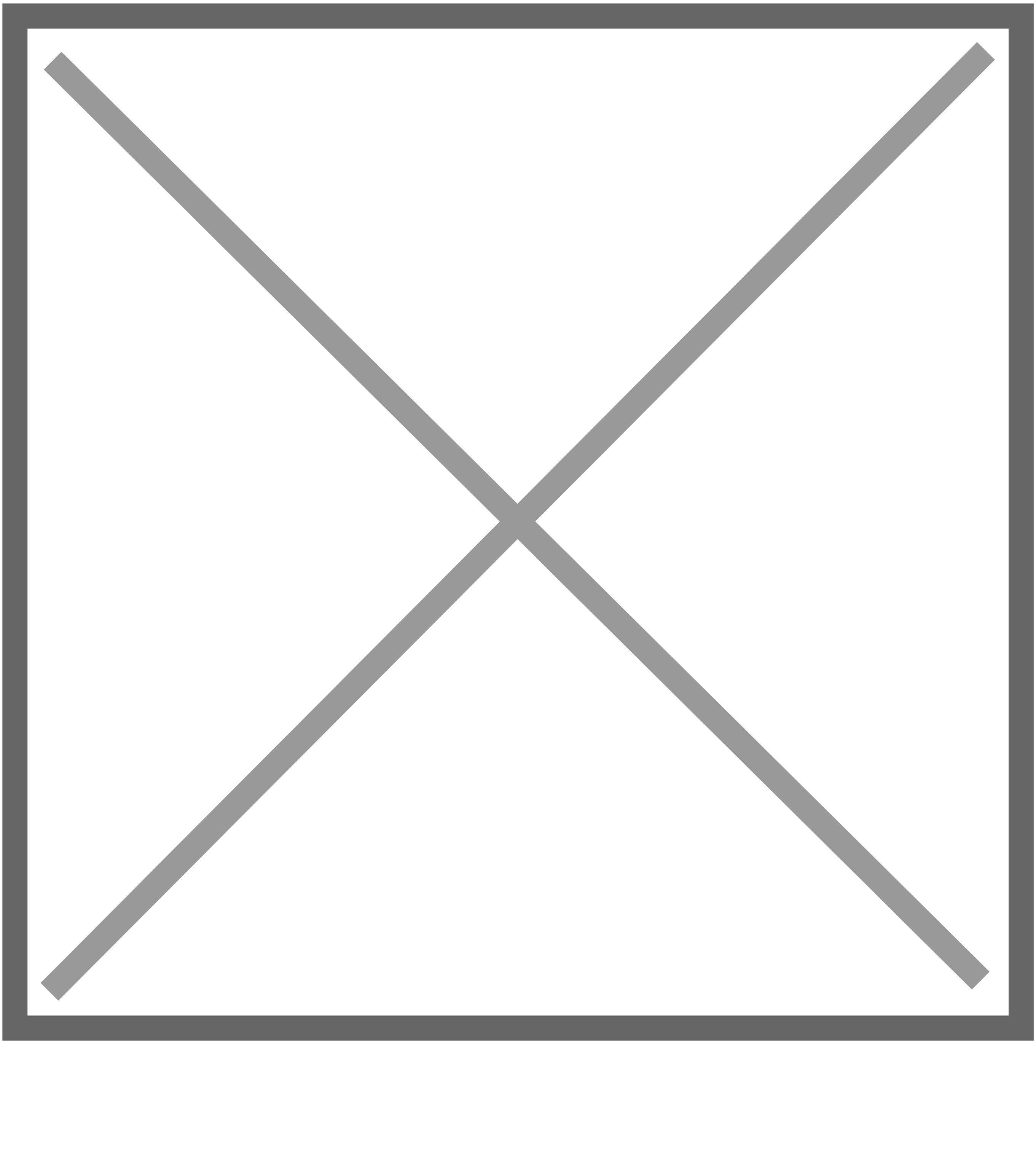
Contact’s Submodules

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

Opportunities

The Opportunities submodule displays all sales opportunities linked to the contact, showing deal stages, values, expected close dates, and statuses. It helps track how the contact is contributing to your sales pipeline and enables quick access to each opportunity for updates or follow-up.

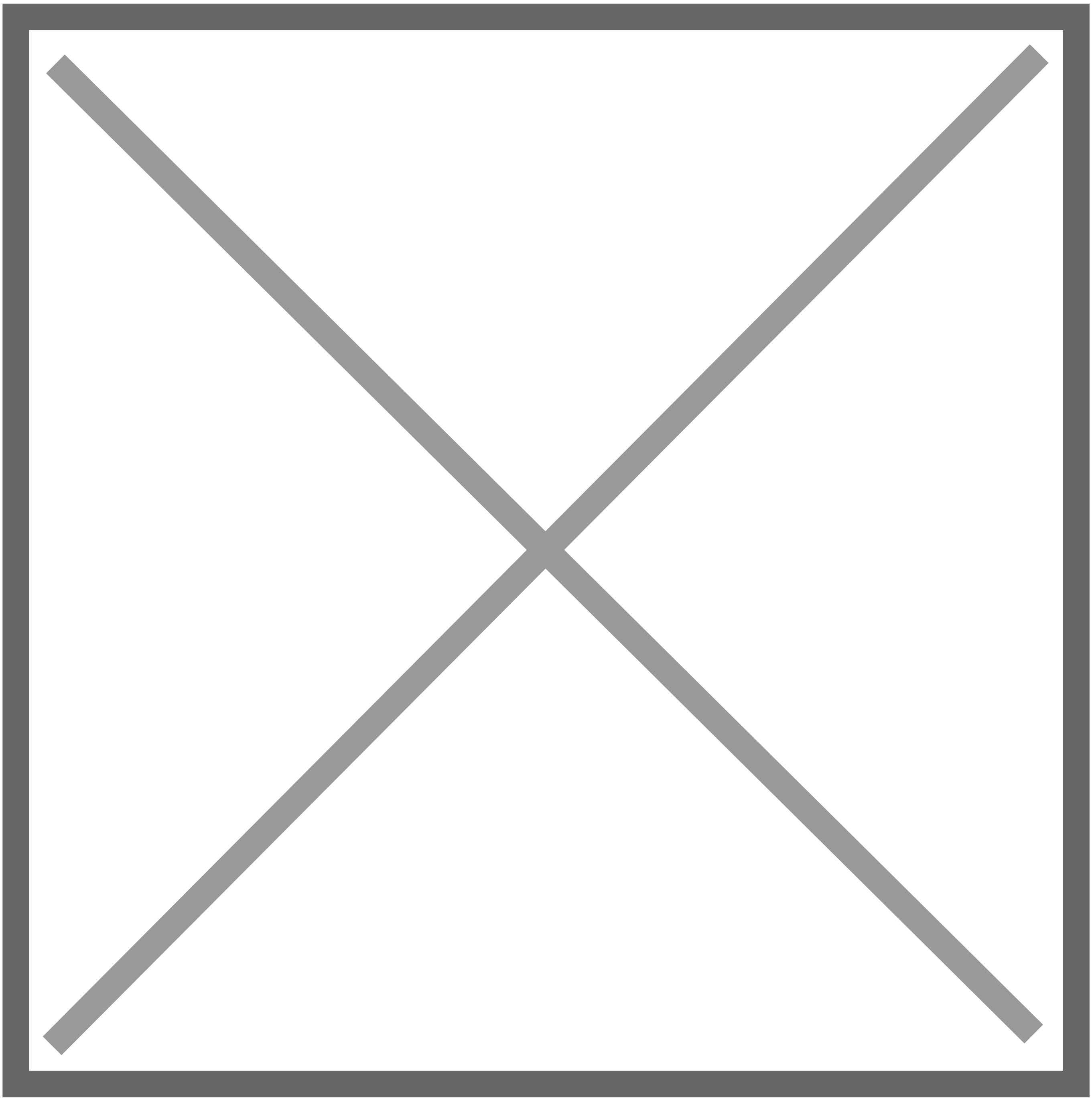
Create or select from existing records to linkup with contact. When lead is converted, opportunity records are linked to the contact.



Documents

The Documents submodule lists all files associated with the contact, such as contracts, proposals, or identification documents. It provides quick access to upload, preview, or manage relevant files directly from the contact’s profile.

Can create a new or select from an existing list.



Leads

The Leads submodule shows all lead records linked to the contact, including their source, status, and qualification progress. It helps track the contact’s journey from initial interest to potential conversion.

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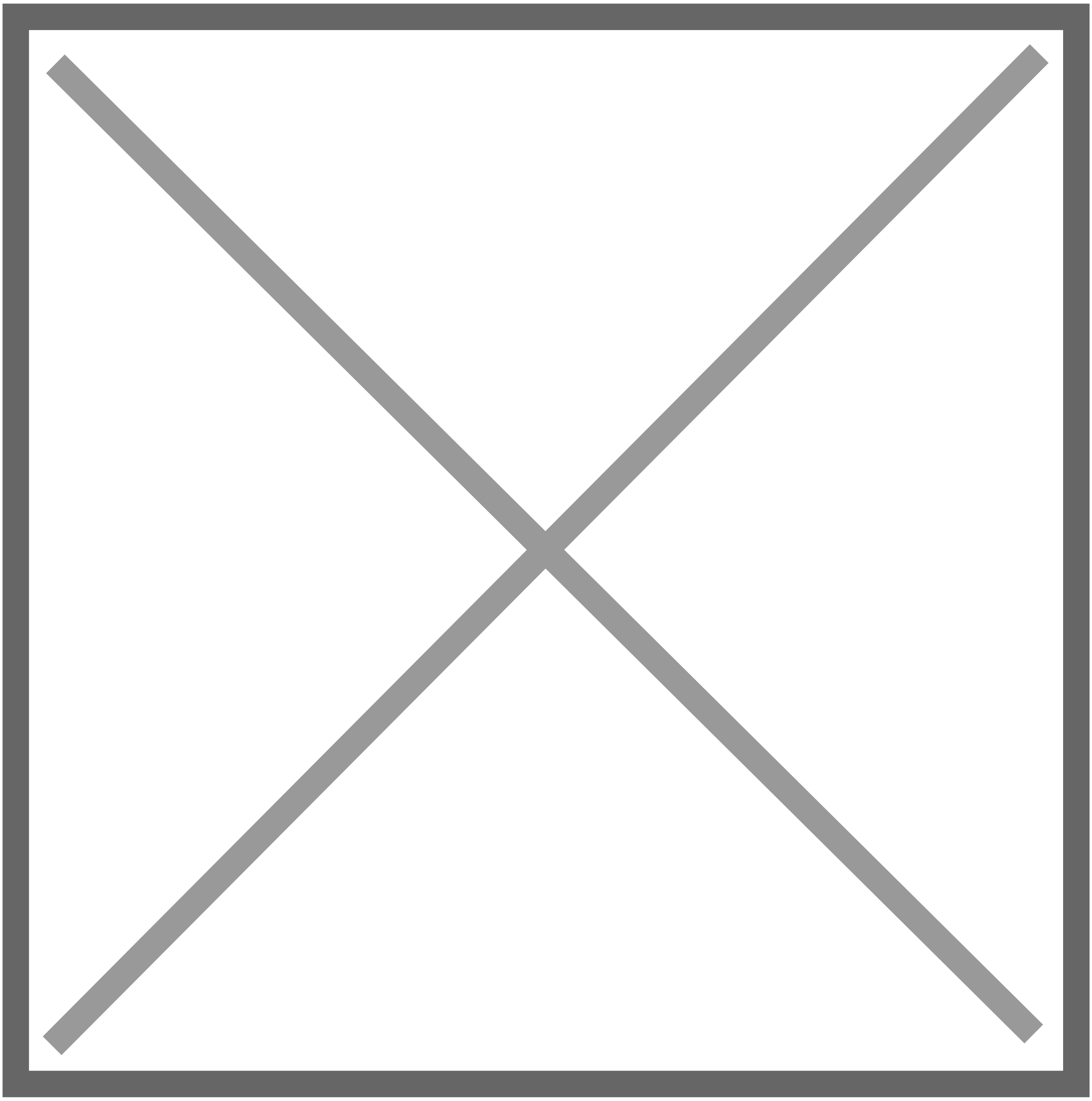
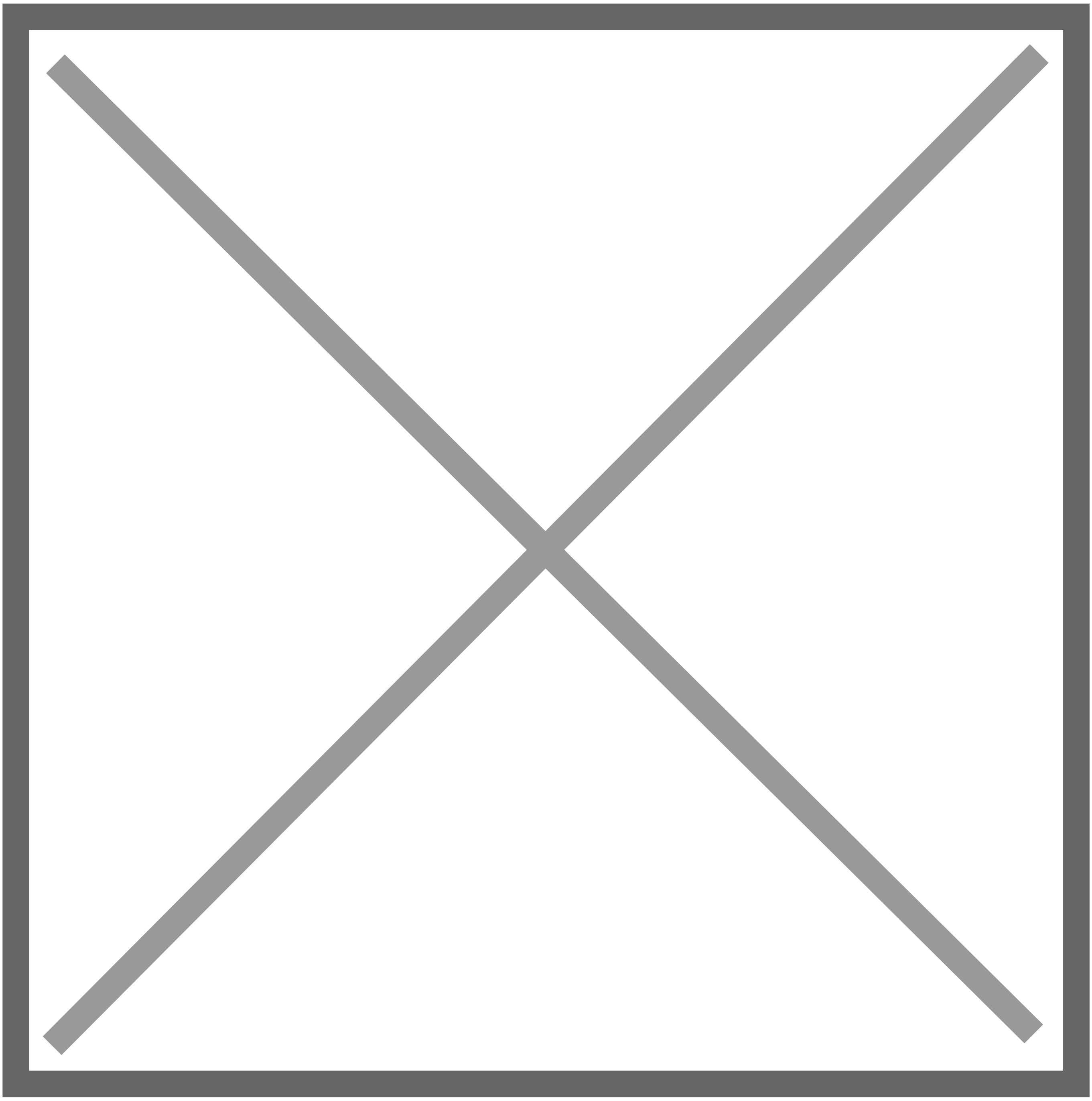


Campaigns

The Campaigns submodule displays all marketing campaigns the contact is part of, showing participation status, engagement metrics, and response history. It helps monitor the contact's interaction with your marketing efforts.



Cases

The Cases submodule lists all support or service cases associated with the contact, including issue descriptions, statuses, priorities, and resolutions. It provides a clear view of the contact’s support history and helps ensure timely follow-up and resolution.

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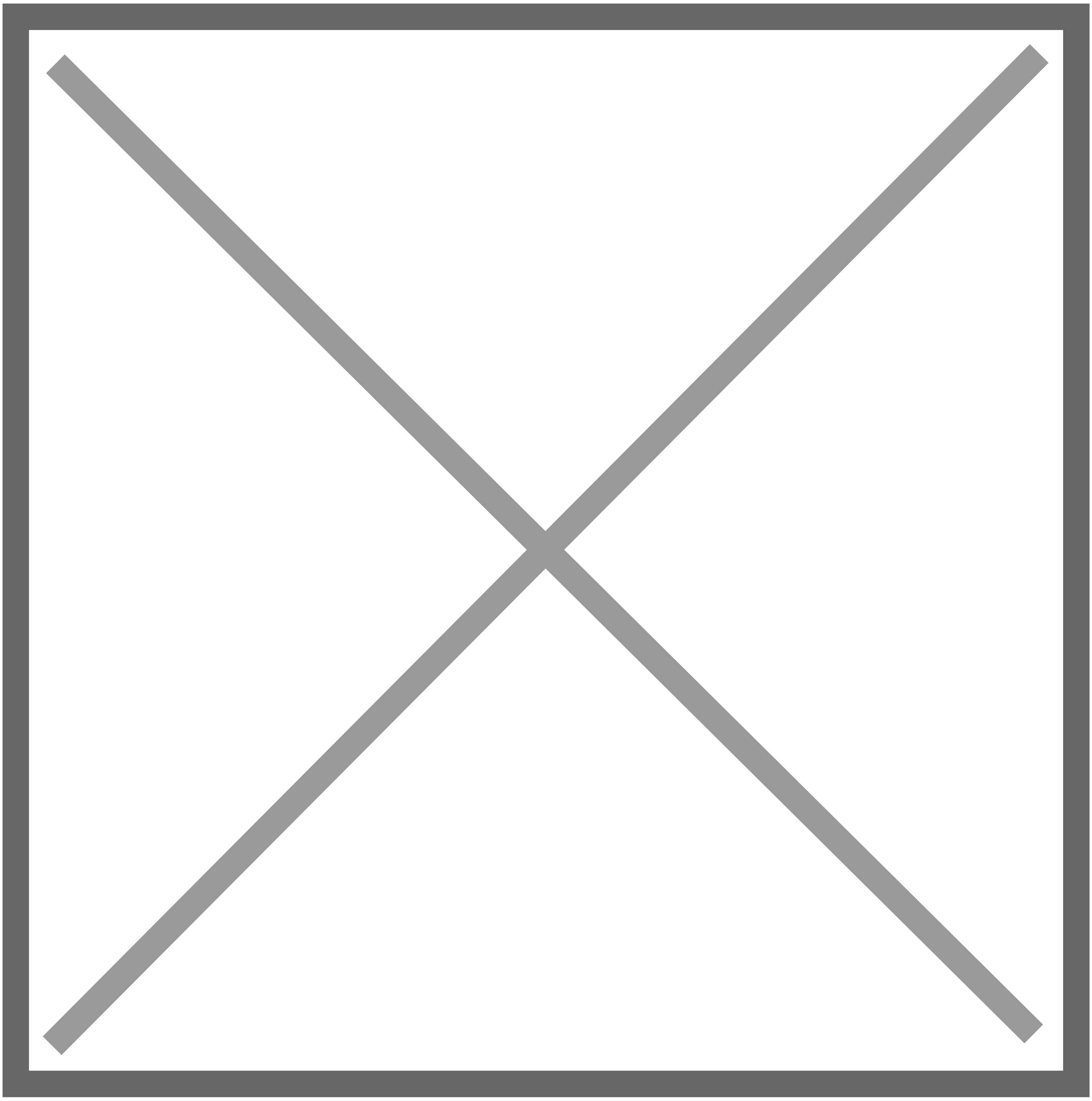

Bugs

The Bugs submodule tracks all software bugs reported by or related to the contact. It includes details like bug status, severity, and resolution progress, helping teams stay informed about product issues affecting the contact.

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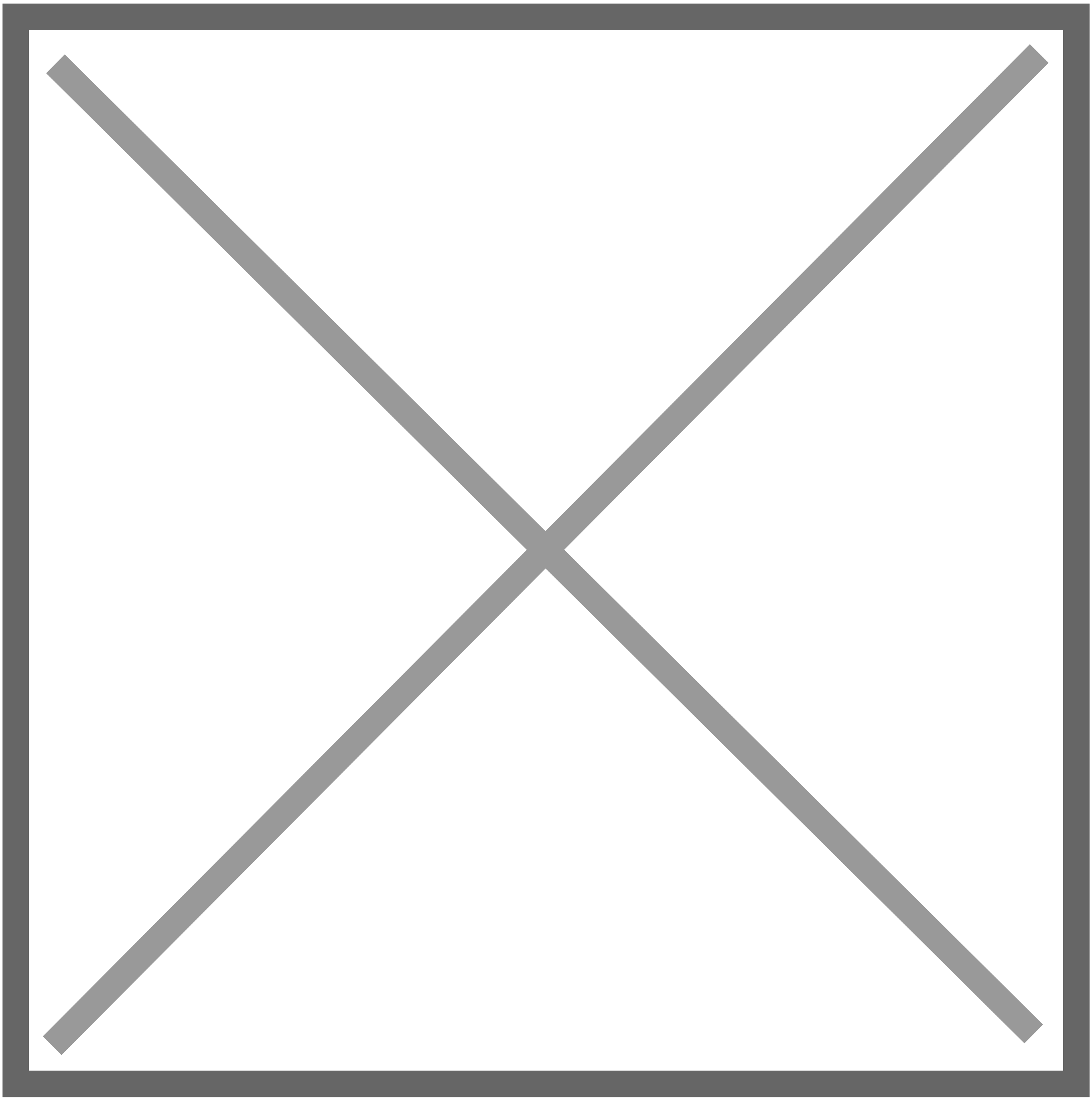

Direct Reports

The Direct Reports submodule lists contacts who report directly to the current contact, typically used in organizational hierarchies. It provides quick visibility into reporting structures and team relationships linked to the contact.

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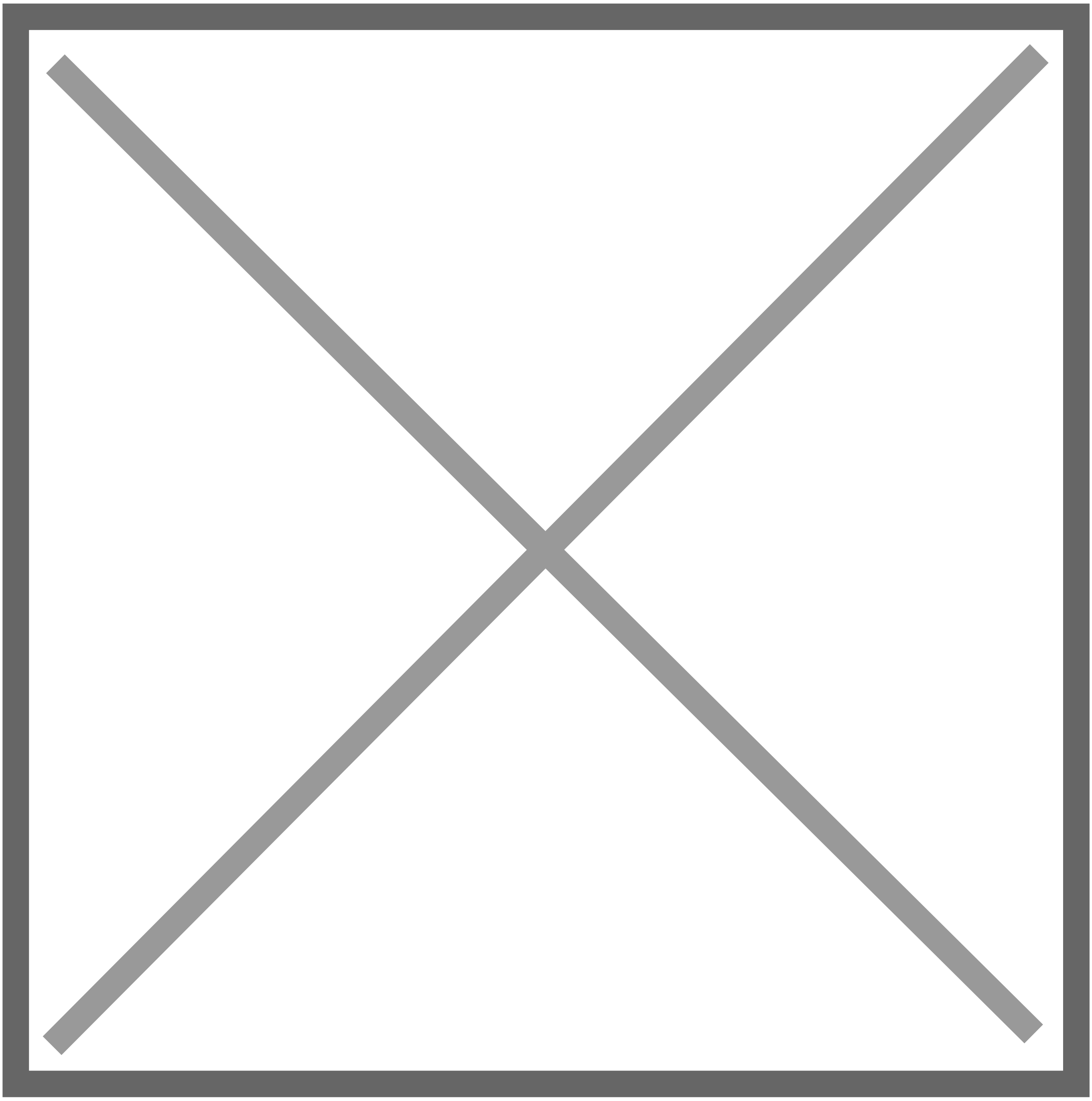
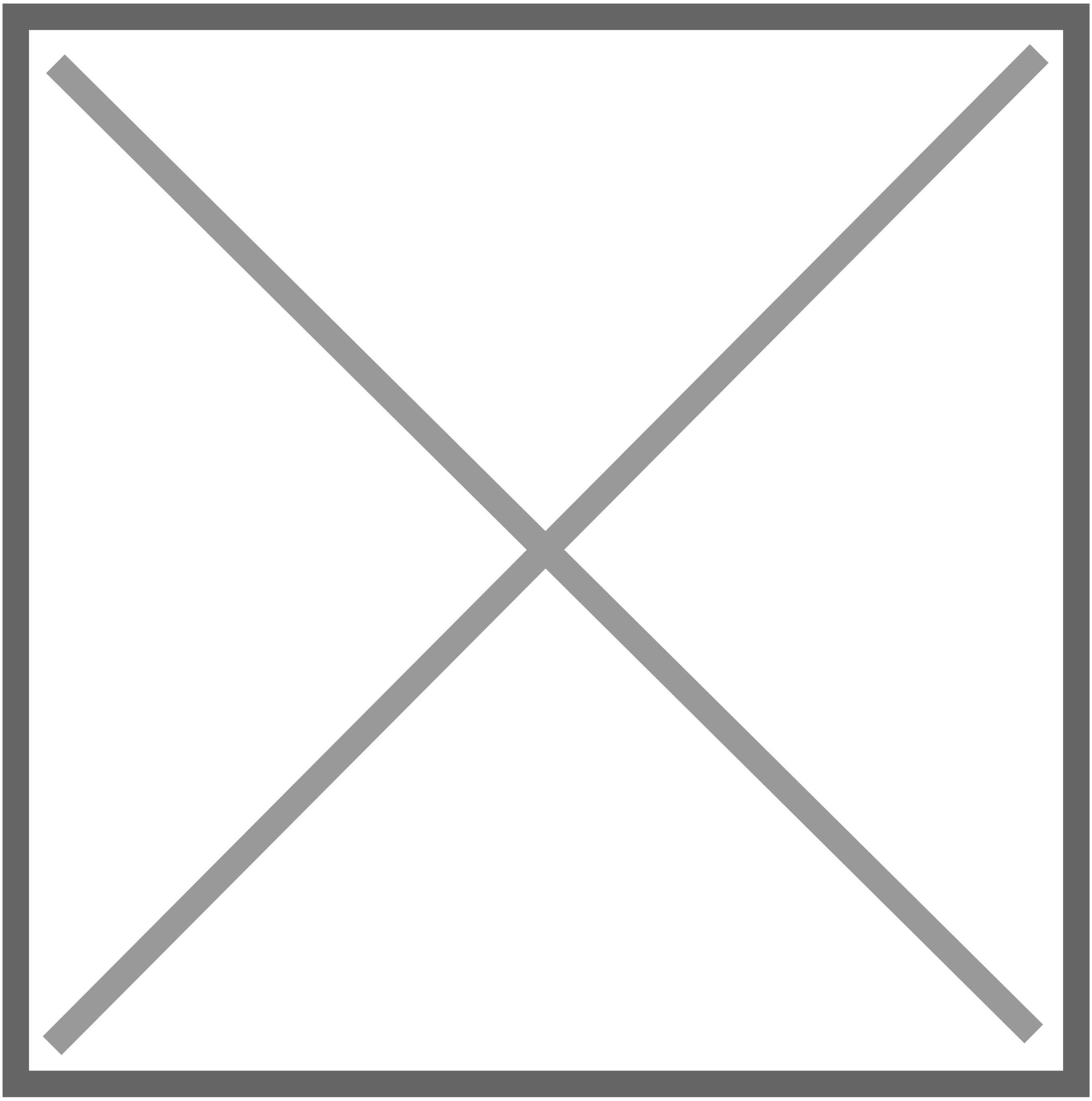


Quotes

The Quotes submodule shows all sales quotes associated with the contact, including quote status, total value, and validity dates. It allows users to manage pricing proposals and track progress toward deal closure.

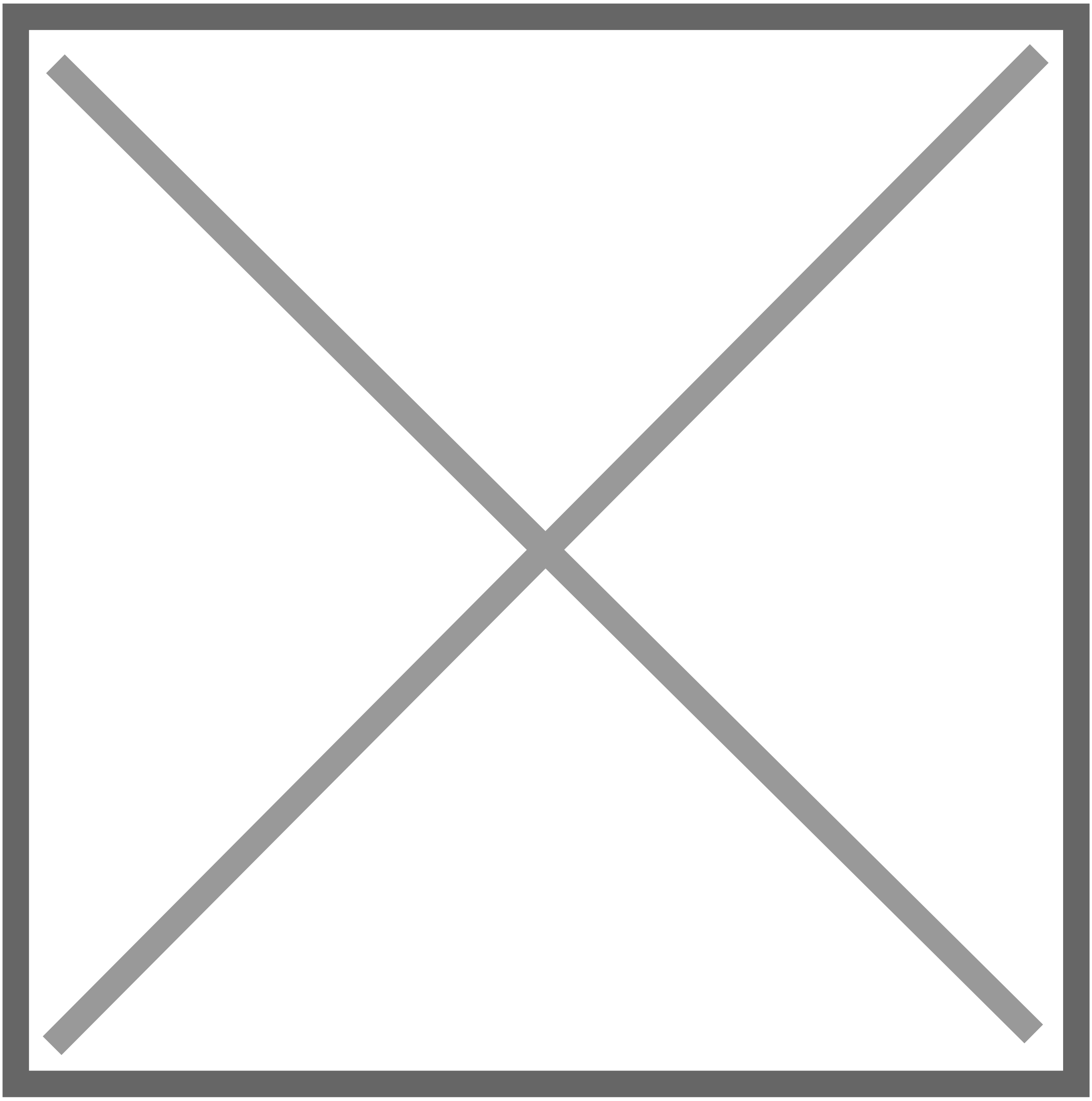
Can create a new or select from an existing list.



Invoices

The Invoices submodule displays all invoices linked to the contact, including invoice numbers, amounts, due dates, and payment statuses. It helps monitor billing history and manage financial interactions with the contact.

Can create a new or select from an existing list.



Contracts

The Contracts submodule lists all contractual agreements related to the contact, showing contract terms, start and end dates, and current status. It ensures quick access to legal and binding documents associated with the contact.

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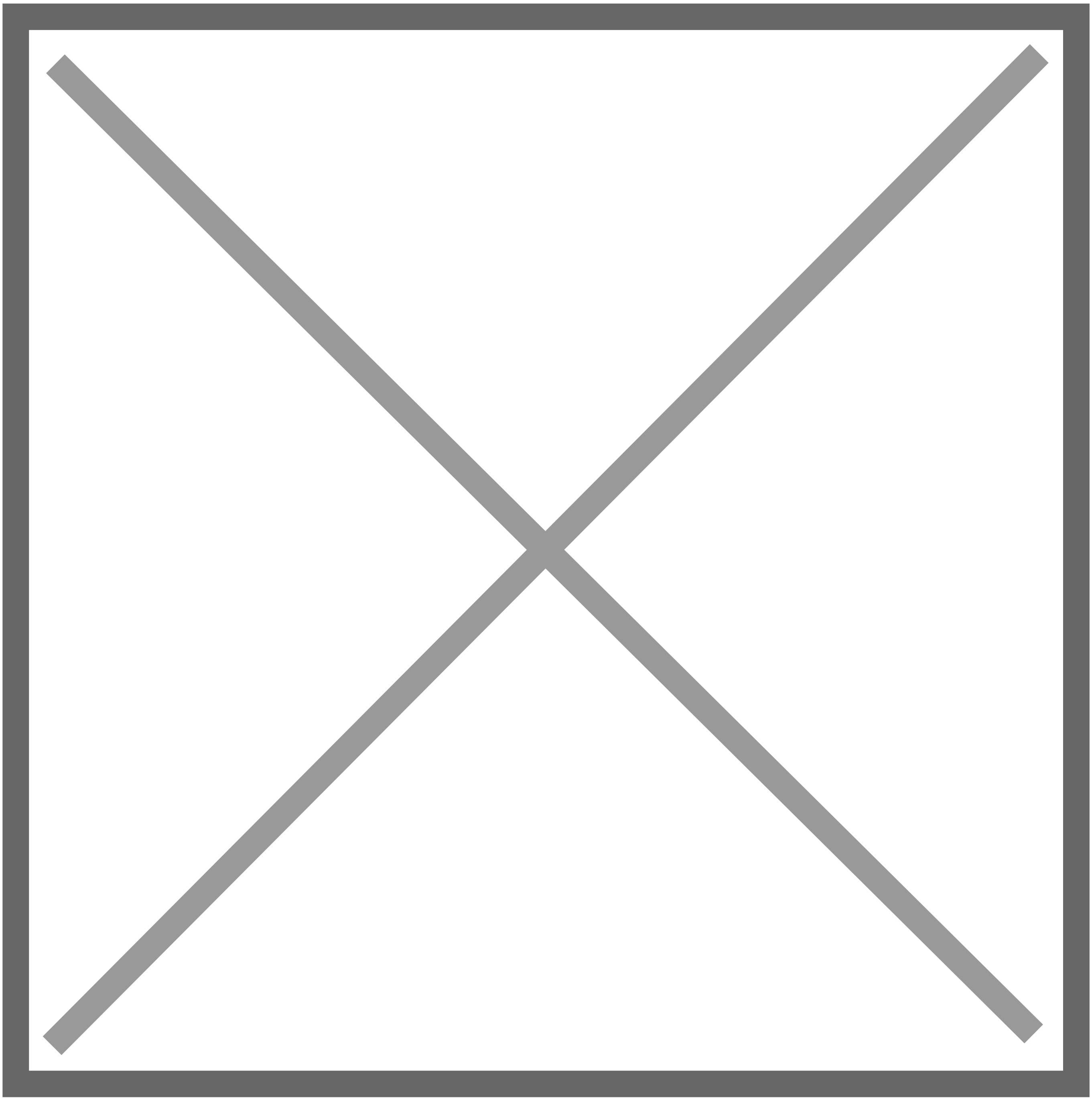

Events

The Events submodule shows all calendar events linked to the contact, such as meetings, webinars, or scheduled calls. It provides a timeline of past and upcoming engagements to support effective planning and follow-up.

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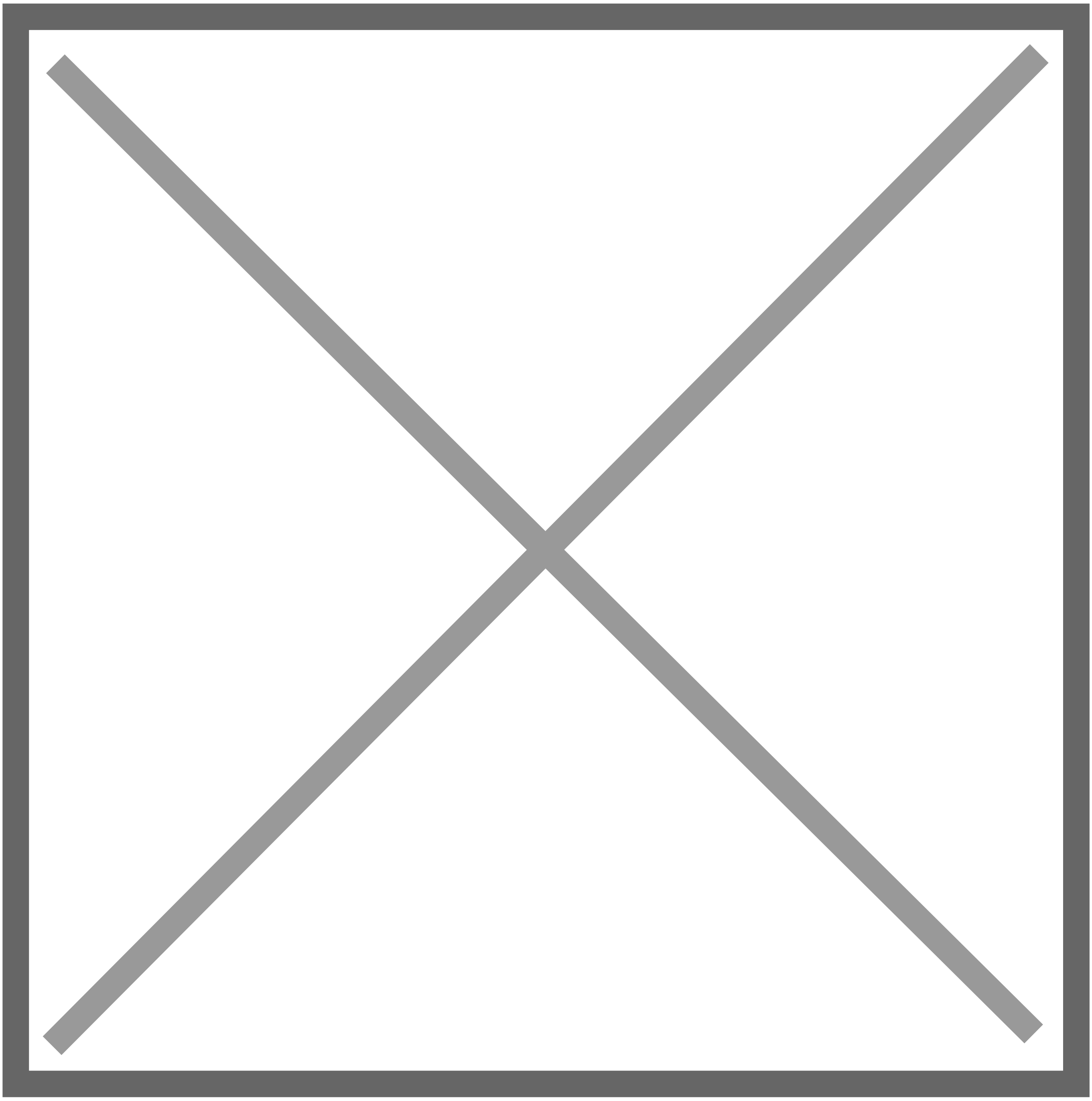
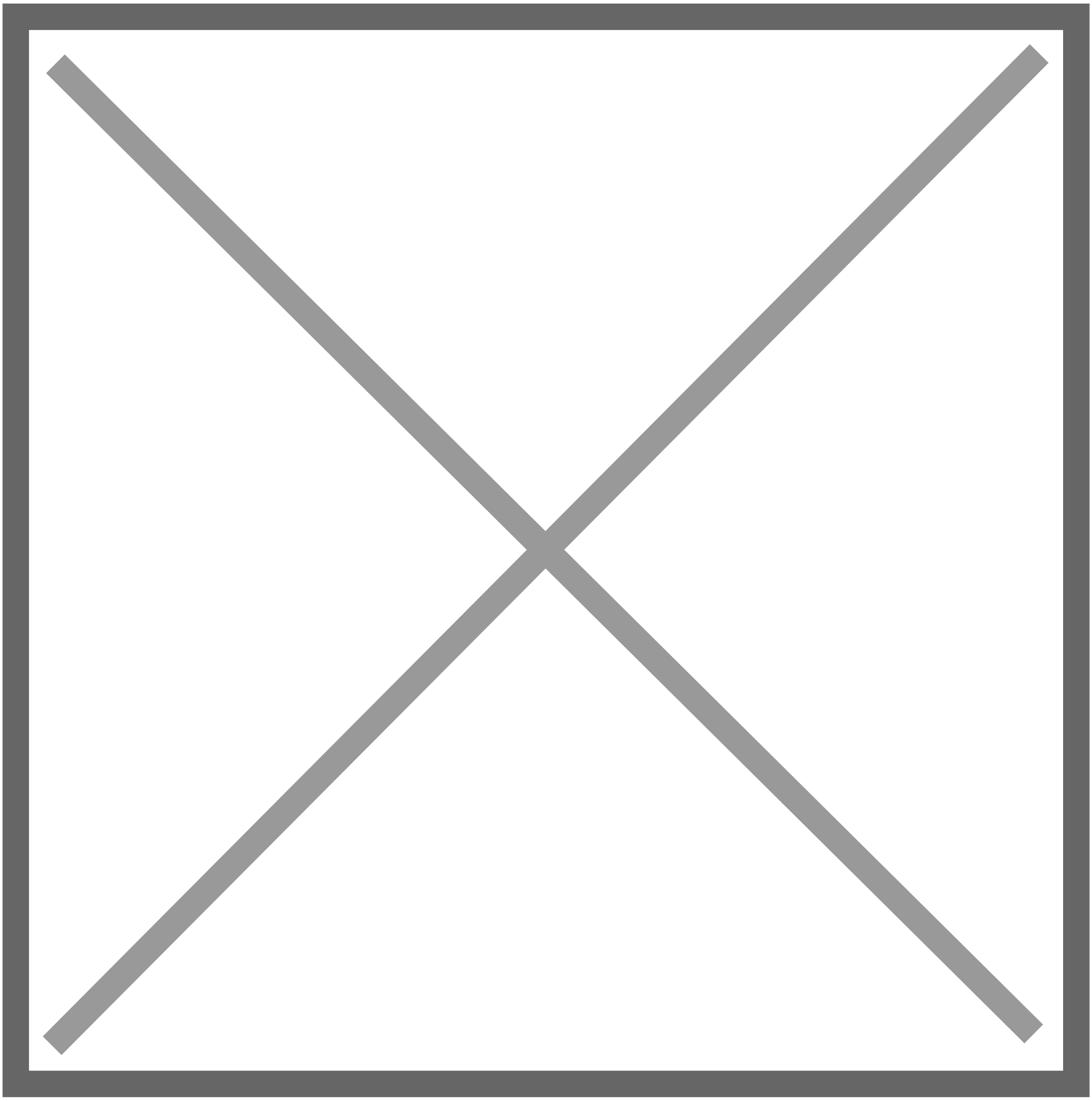


Projects

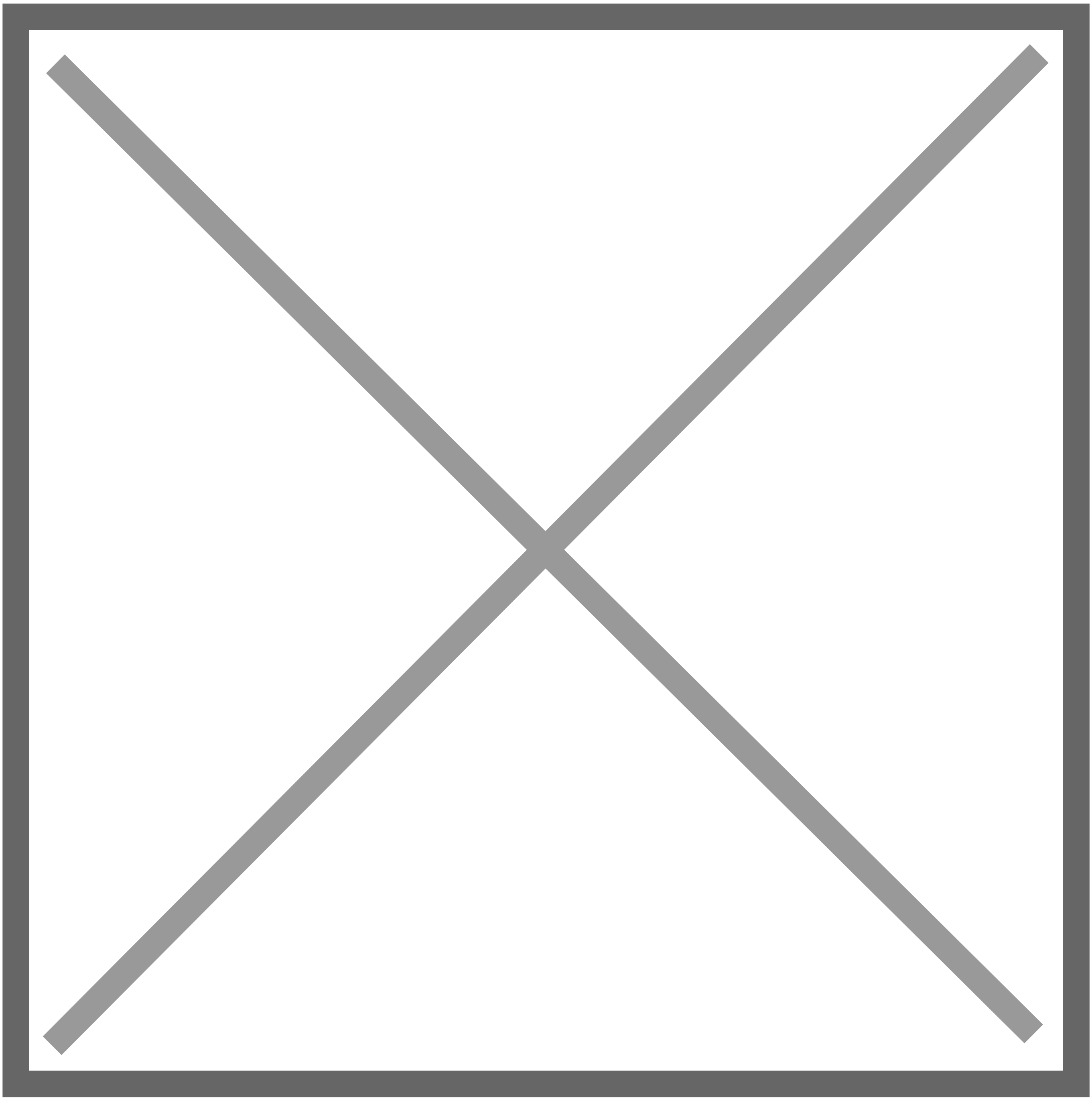
The Projects submodule displays all projects associated with the contact, including project names, statuses, deadlines, and roles. It helps track the contact’s involvement in ongoing or completed initiatives, ensuring better collaboration and accountability.

Can create a new or select from an existing list.



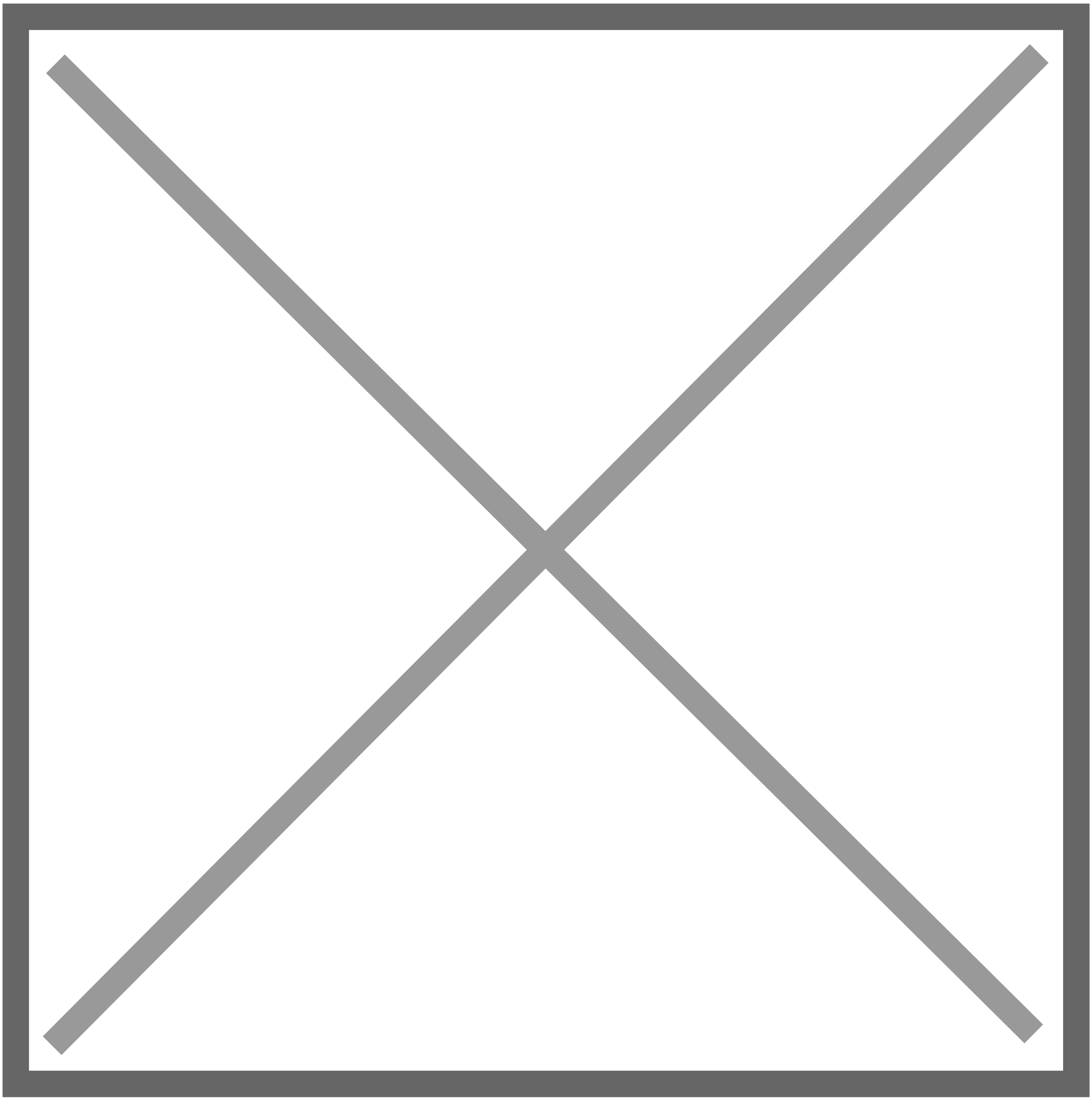
Security Groups

The Security Groups submodule shows which access control groups the contact belongs to, helping manage visibility, permissions, and data security across the CRM. It ensures the right users can access and manage the contact's information.



SMS

The SMS submodule lists all text message interactions with the contact, including message content, timestamps, and delivery status. It provides a quick overview of mobile communication for better engagement tracking.



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.

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