

Dashboards

The KiyoCRM Dashboard allows for a highly customizable layout using panels and tabs, accessible via the three-dot menu at the top right of the dashboard interface.

[image.png](#)

Dashboard Options

1. Add Panel

- Opens a form to insert a new dashlet (e.g., bar chart, pie chart, reports etc.).
- Users can choose panel type and data source to display relevant insights.

[image.png](#)

2. Add Tab

- Creates a new dashboard
- Ideal for organizing data by department, role, or workflow.
- Prompts for:
 - Tab name
 - Number of columns (for layout)

[image.png](#)

3. Manage Panel

- Allows users to:
 - Rearrange Dashboards in an order.
 - Customize the layout within a tab.

[image.png](#)

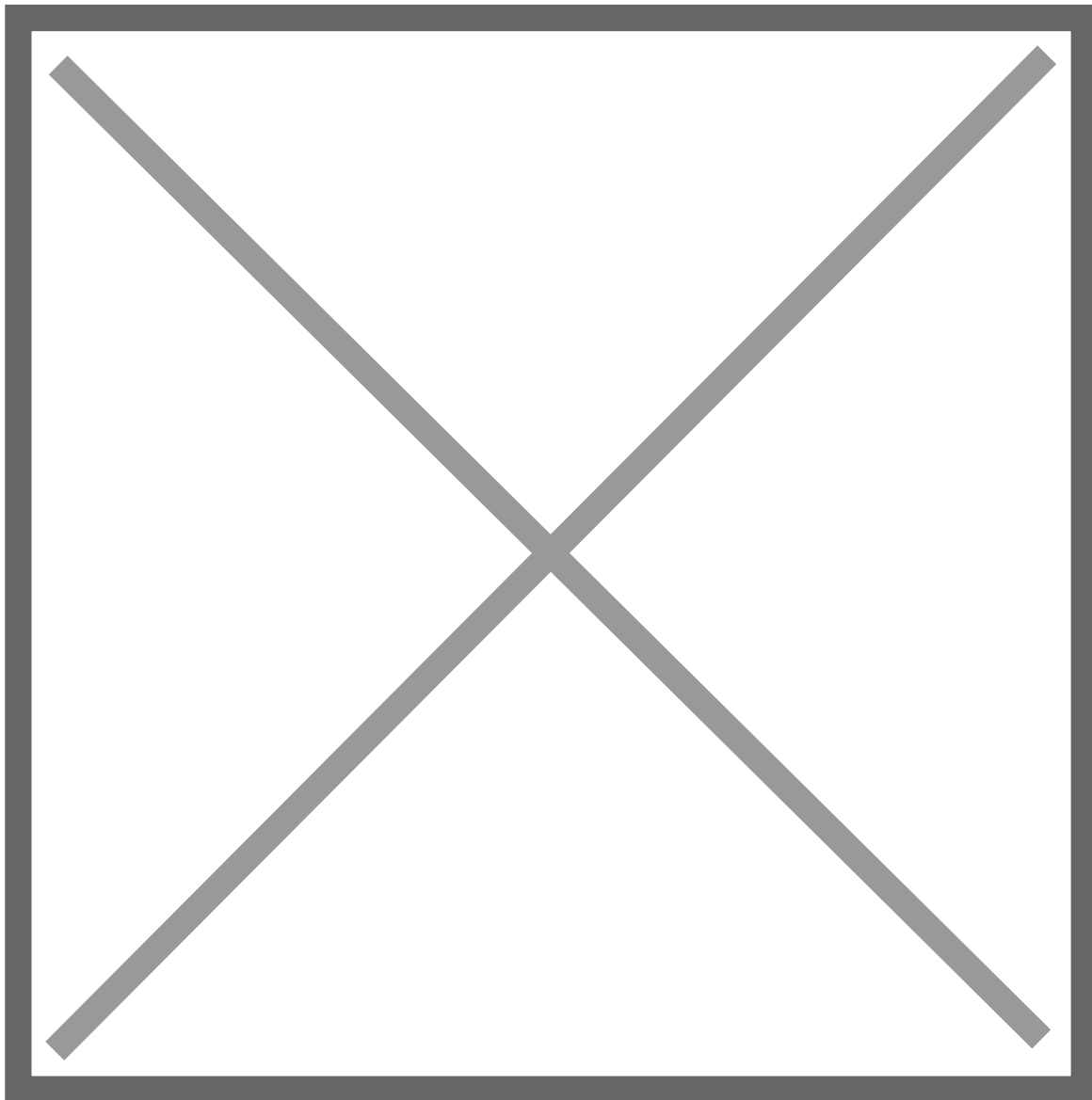
Dashboard Search Function

The Search bar at the top-left of the KiyoCRM Dashboard provides a fast and intuitive way to locate records, modules, or actions within the CRM system.

[image.png](#)

What It Does

- Instant Global Search: Search across all CRM modules—Contacts, Leads, Deals, Tasks, Notes, etc.from one place.
- Full-Text Indexing: Every piece of CRM data is indexed, allowing deep keyword-based search, including partial and fuzzy matches.



Revision #3

Created 10 May 2025 06:02:56 by Admin

Updated 22 May 2025 07:07:42 by Admin