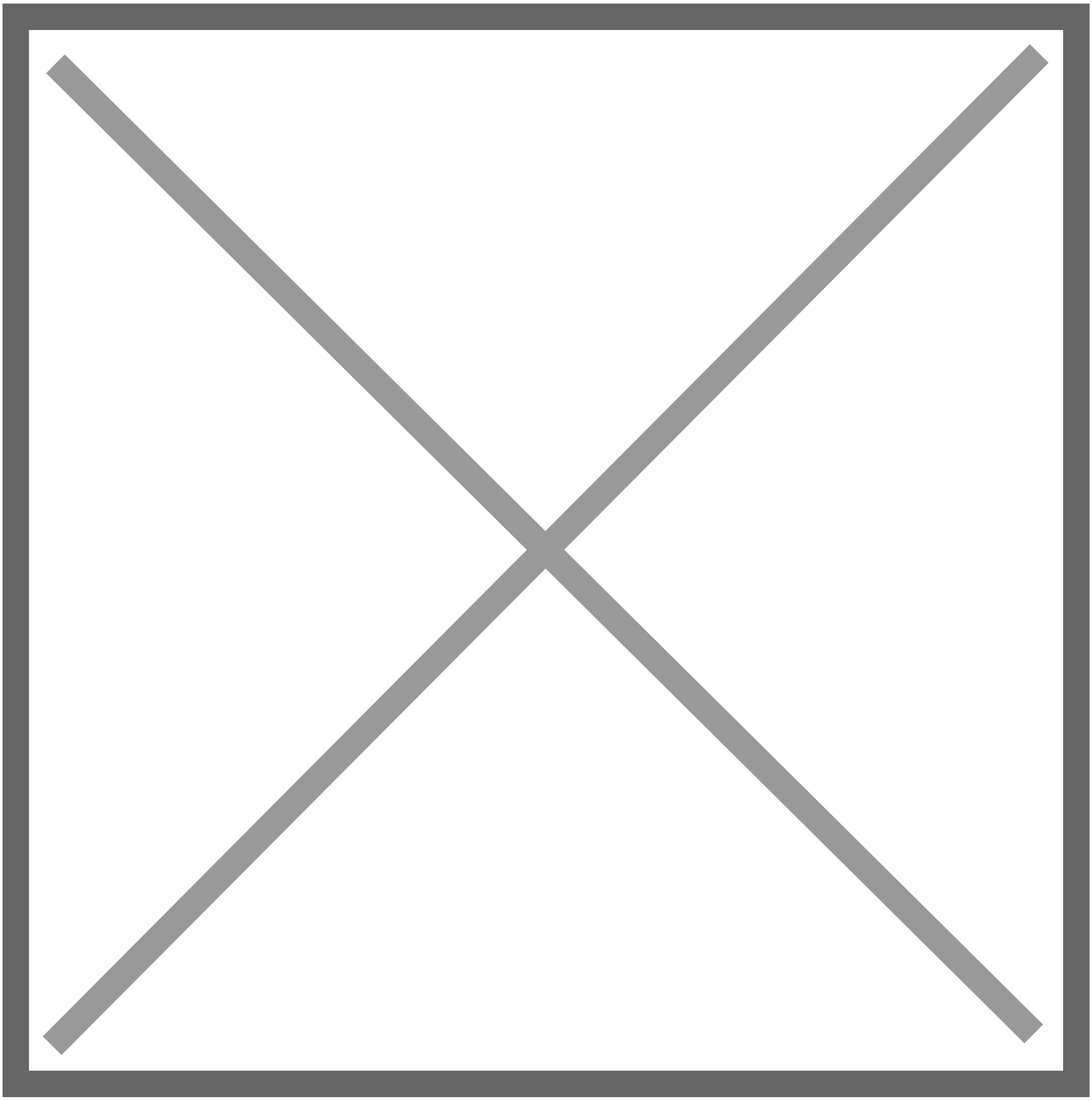
Documents

The Documents module can be used as a repository for Customer issued or internal files. This content can be uploaded, revised and viewed in addition to relating to individual records within KiyoCRM.

List View Actions

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

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

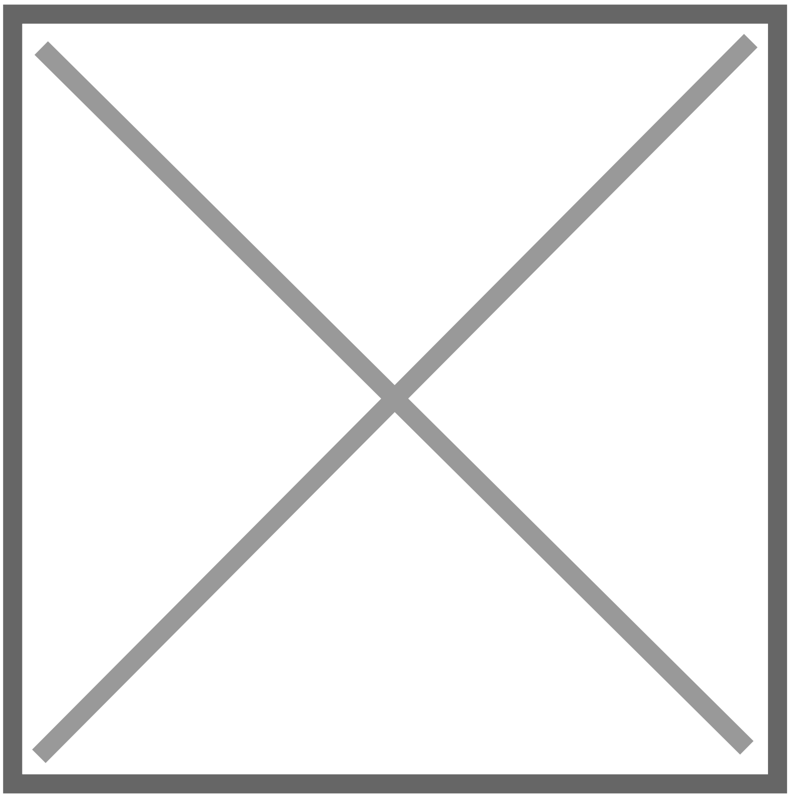


- **View Documents** – Redirects you to the List View for the Documents module. This allows you to search and list Document records.
- **Filters, Column Chooser, Favorites** are similar to other modules. Refer Leads module Column Chooser , Filters , Kanban View for reference.
- To sort records on the Documents, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Document, Use Search engine on top
- Clicking on the pencil icon Documents list view page to the display of record edit view.

Bulk Actions

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

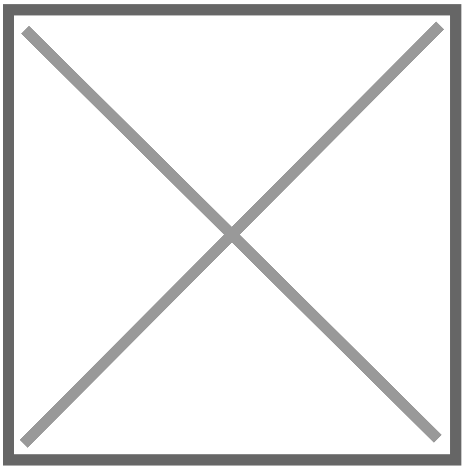
- **Mass Update, Export, Delete** are similar to the Meetings module. Refer Meetings module Bulk Actions for reference.



Detail View Actions

Click on the Subject to view detail view:

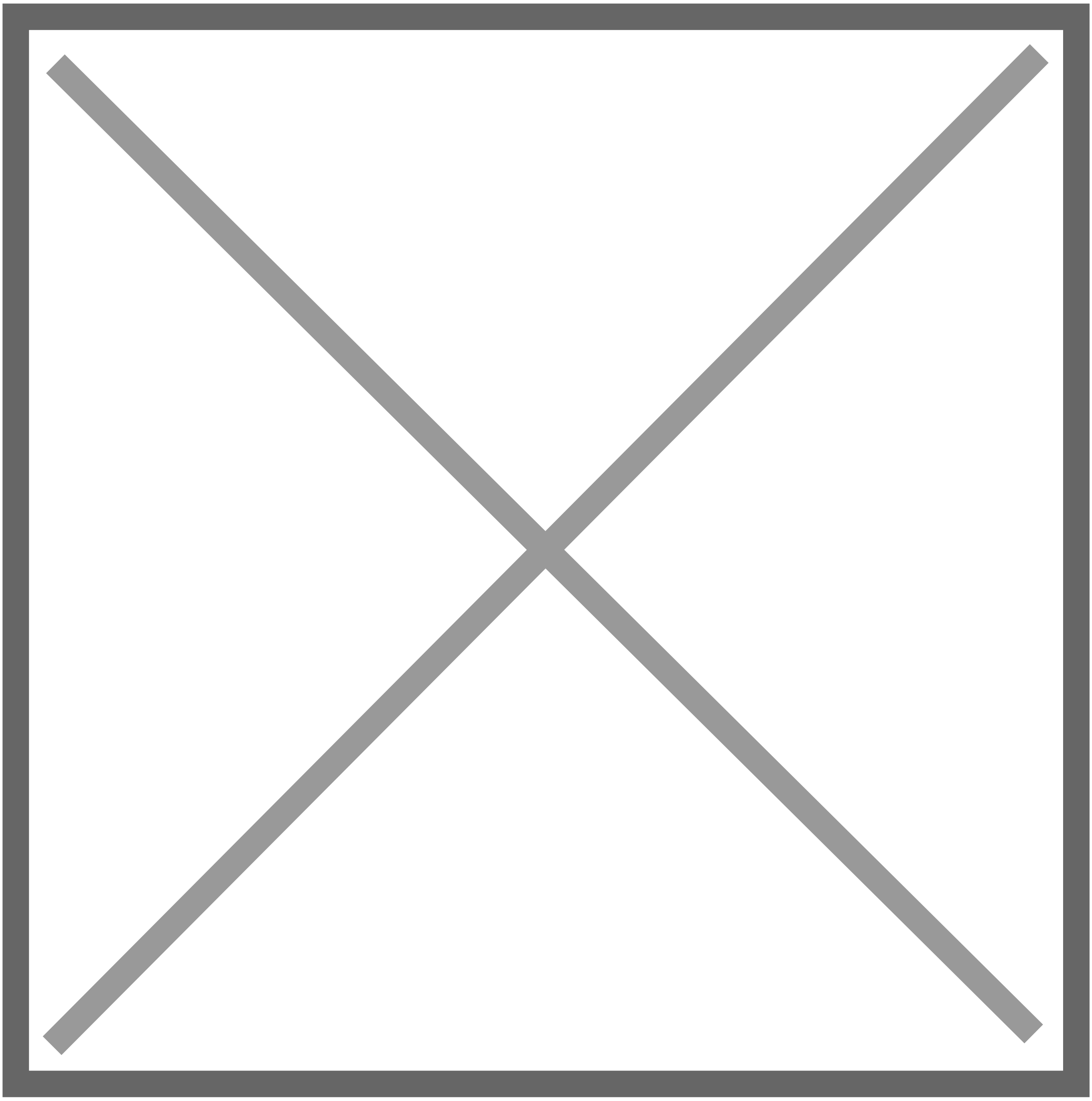
- **Edit, Duplicate, Delete functionalities** similar to Meetings module detail view actions. Refer Meetings module Detail Actions.



Submodules

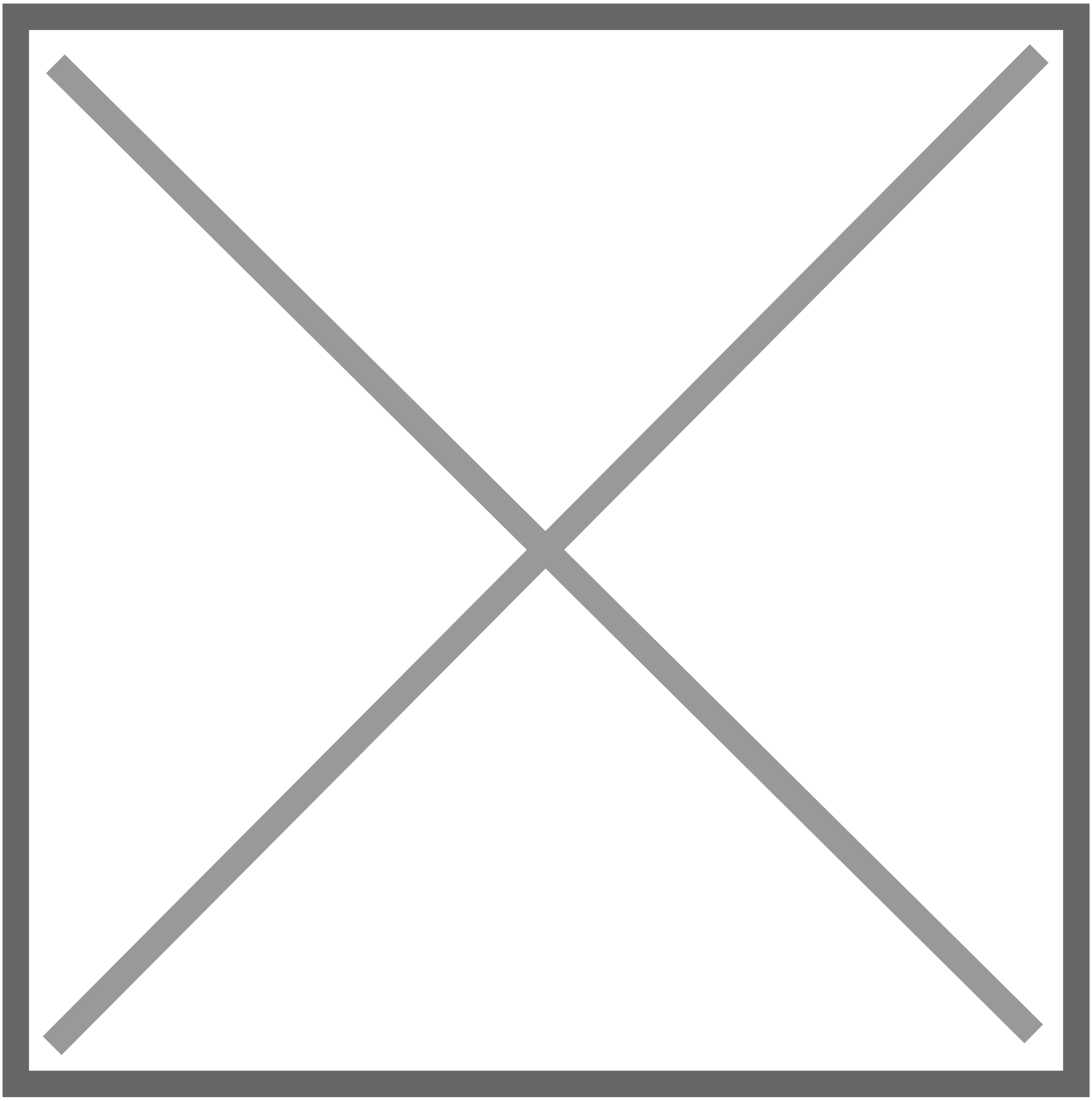
Documents Revisions

This submodule allows users to manage document versioning by recording each update with details like revision number, creation date, creator, and change log, ensuring full traceability and accountability.



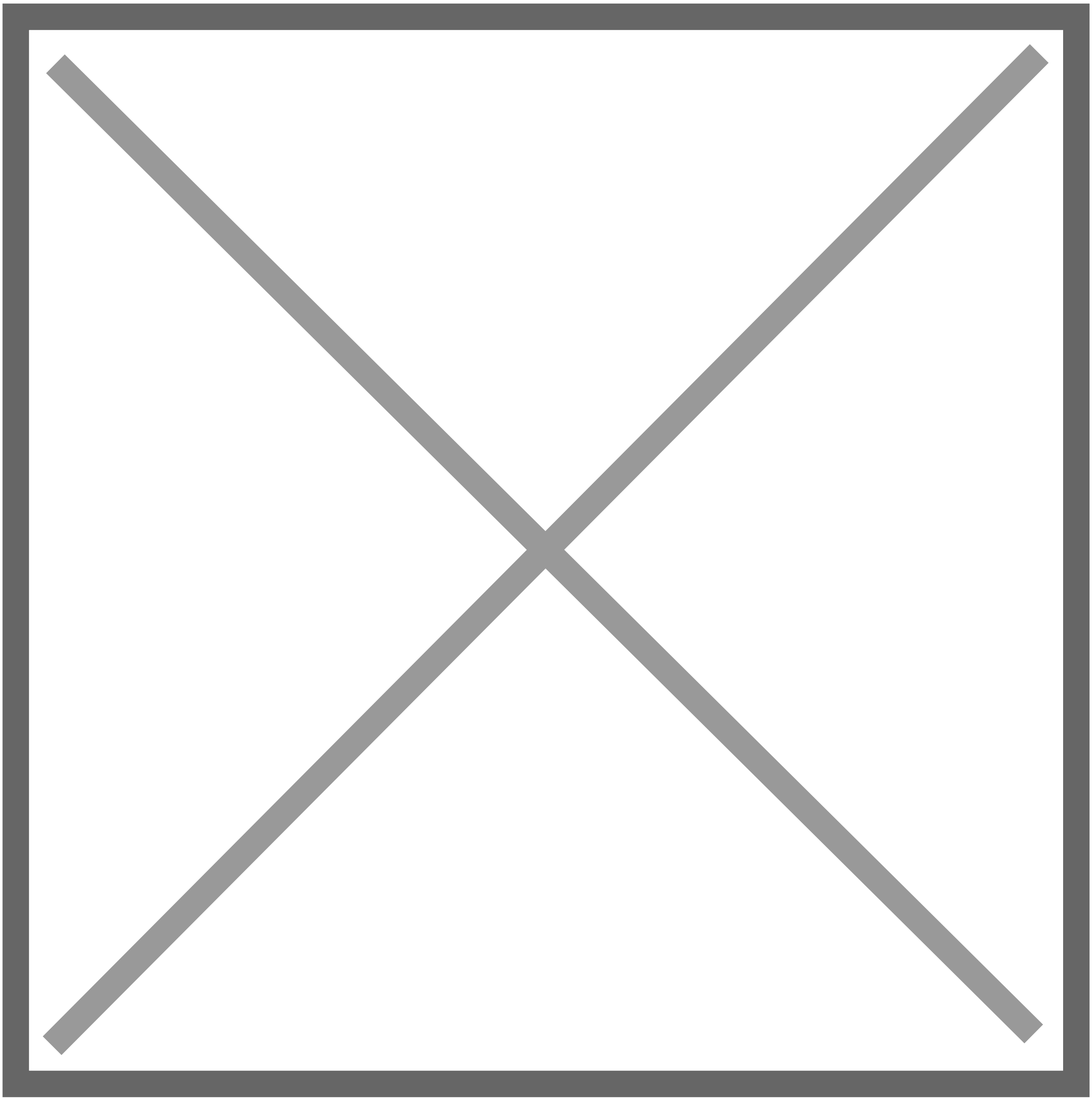
Companies

This section links documents to specific companies, helping users organize and track files based on associated businesses for easy access and reference.



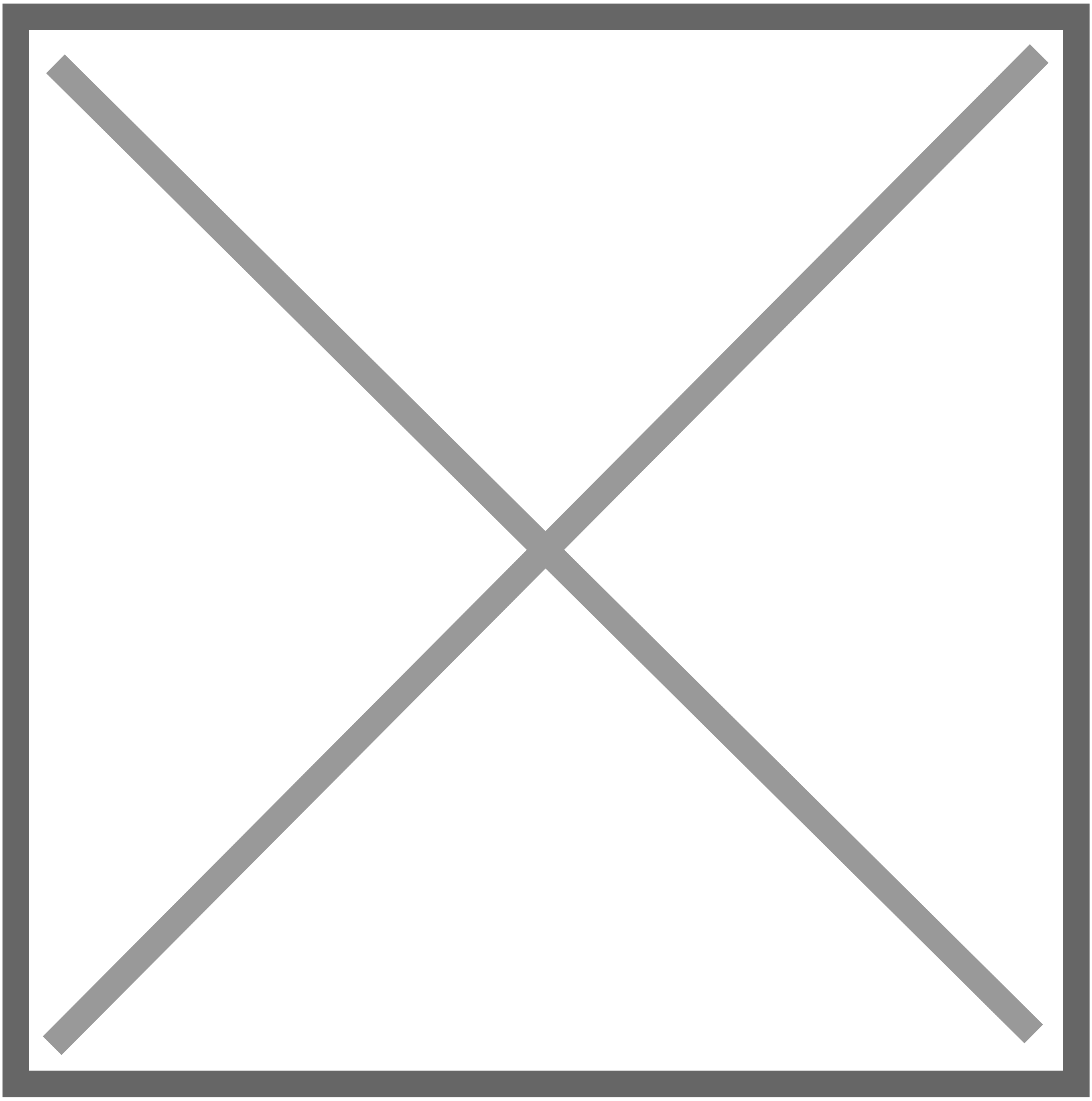
Contacts

This submodule links documents to individual contacts, allowing users to manage and retrieve documents related to specific people efficiently.



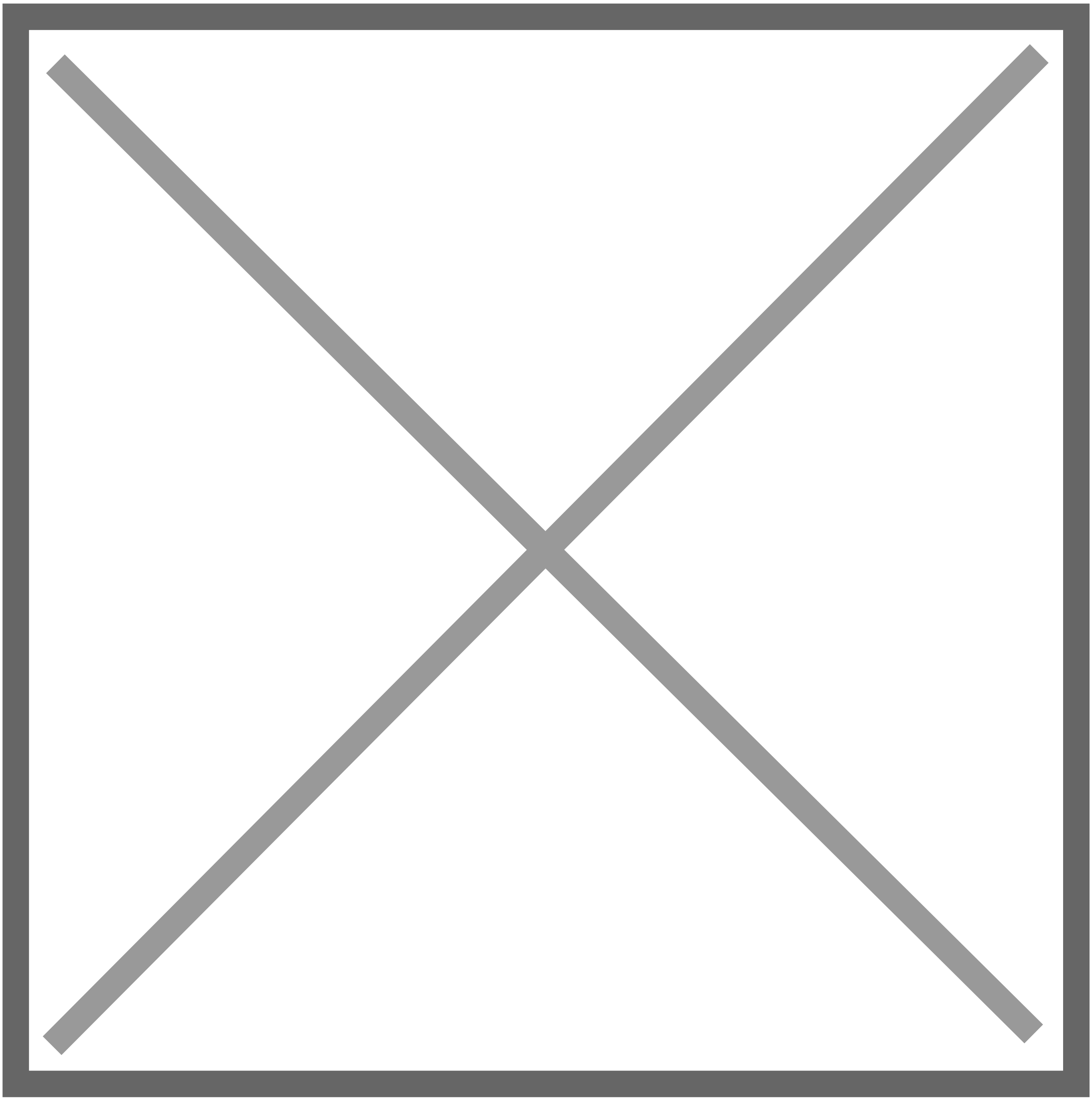
Opportunities

This submodule associates documents with sales opportunities, helping teams track proposals, quotes, and other relevant files throughout the sales pipeline.



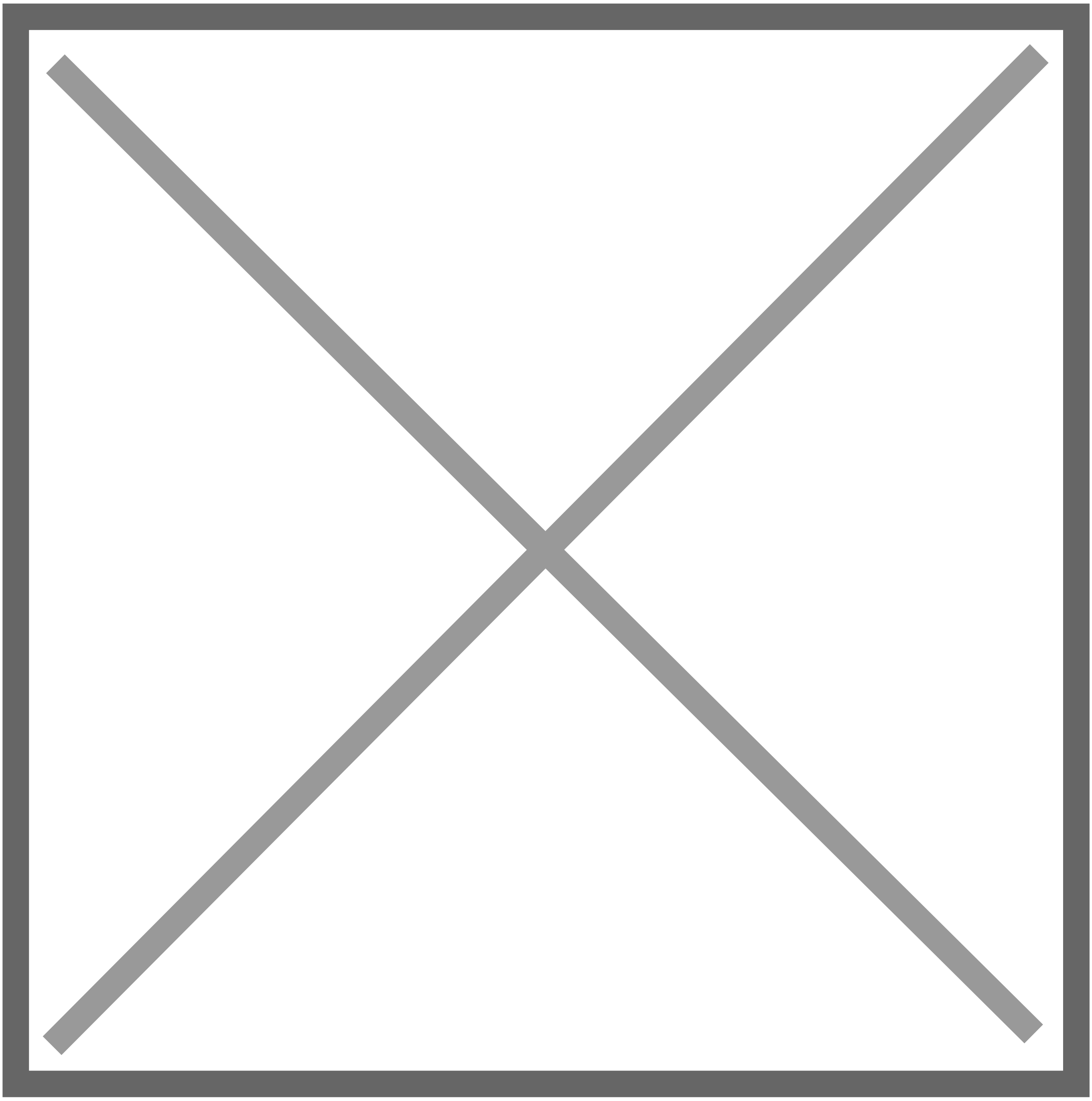
Cases

This submodule links documents to customer support cases, allowing users to store and reference related files such as issue logs, screenshots, or resolution documents.



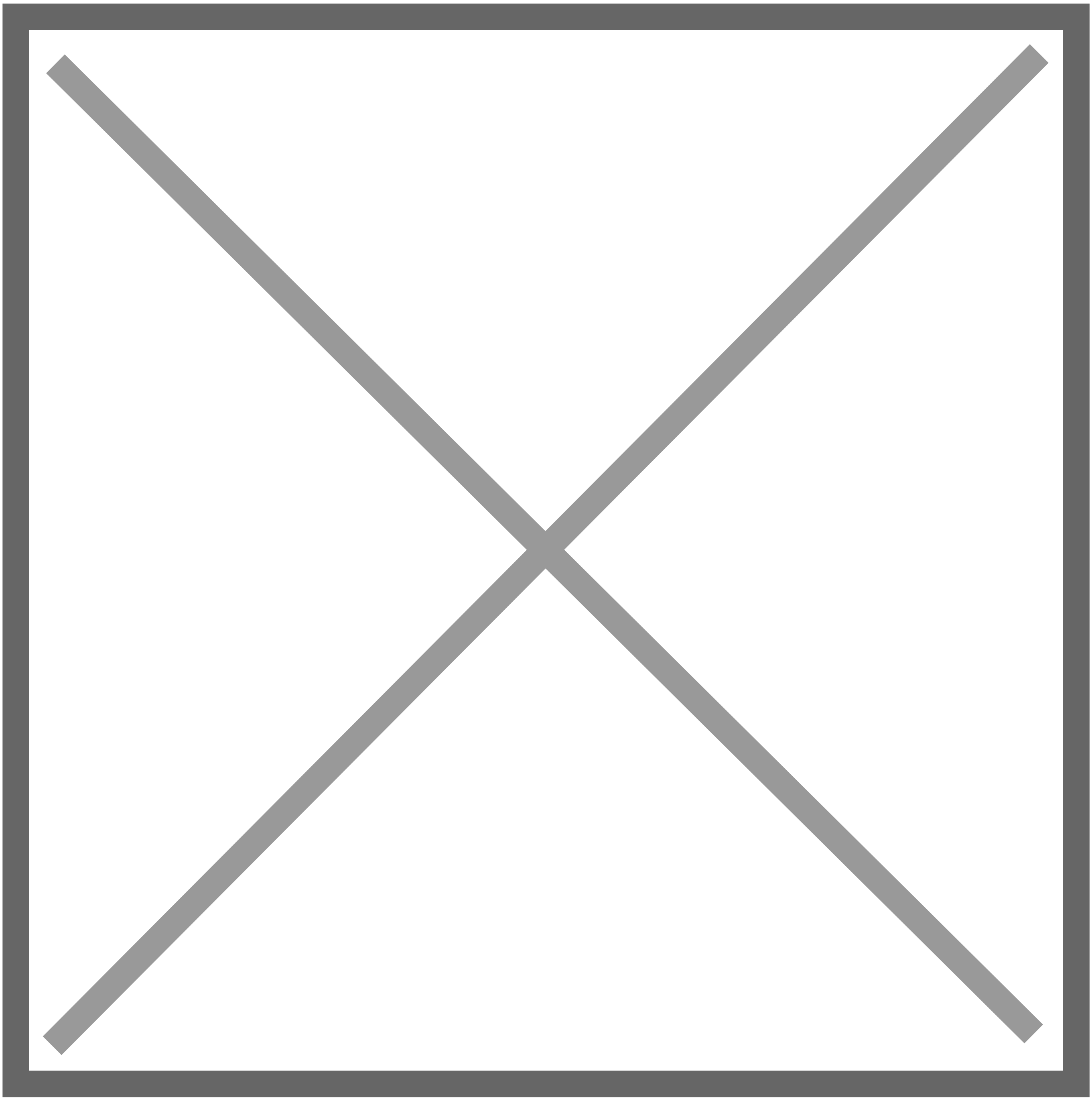
Bugs

Links documents to reported bugs, allowing users to attach supporting files like error logs, screenshots, or test results for better issue tracking and resolution.



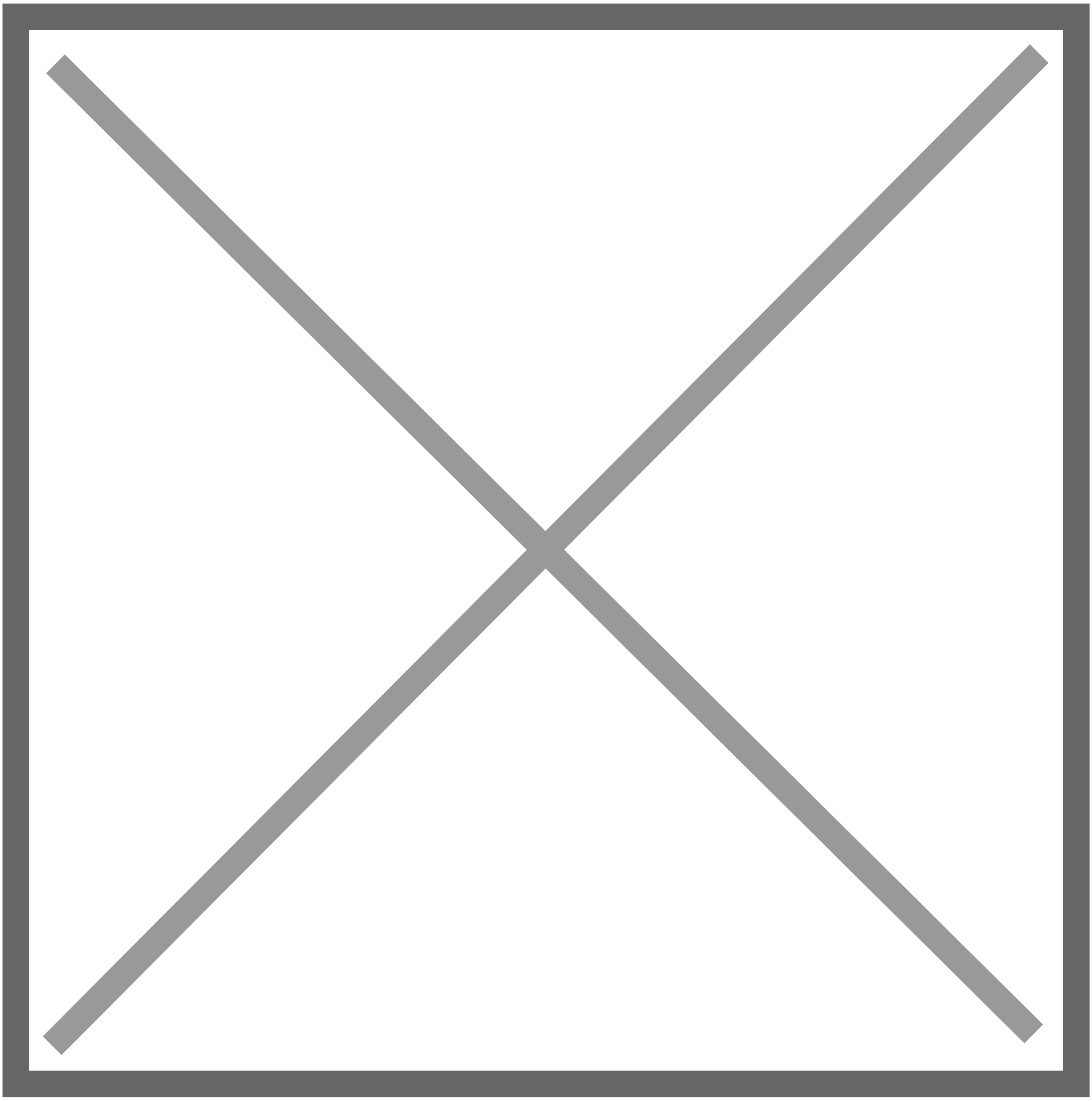
Contracts

Associates documents with contract records, enabling users to store, access, and manage related files such as signed agreements, terms, and amendments in one place.



Security Groups

The "Security Groups" submodule controls user access to documents, defining who can view, edit, or delete based on assigned roles or groups, ensuring data security and integrity.



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 #8
Created 12 May 2025 09:34:47 by Admin
Updated 22 May 2025 09:55:40 by Admin