

Emails

The Emails module in Kiyocrm allows Users to view, store, compose, send and receive email from their own personal email account or a shared inbox, for example a Support or Sales inbox. Emails can be imported and associated with a related Kiyocrm record, for example a Contact or a Company. These related emails can then be viewed on the history subpanel of the related record.

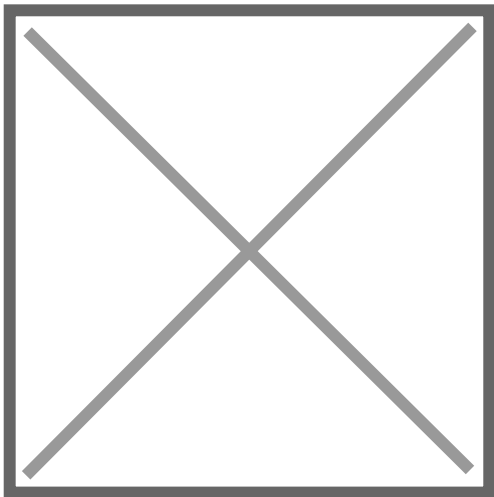
You will need to set up and have access to at least one personal or group email account in order to use the Emails module. Please contact the Support Team for SMTP settings.

Emails module can access from side navbar

List View Actions

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

- **Filters, Column Chooser, Favorites** are similar to other modules. Refer Leads module for reference.
- **View Email:** Opens and displays the full content of the selected email message.



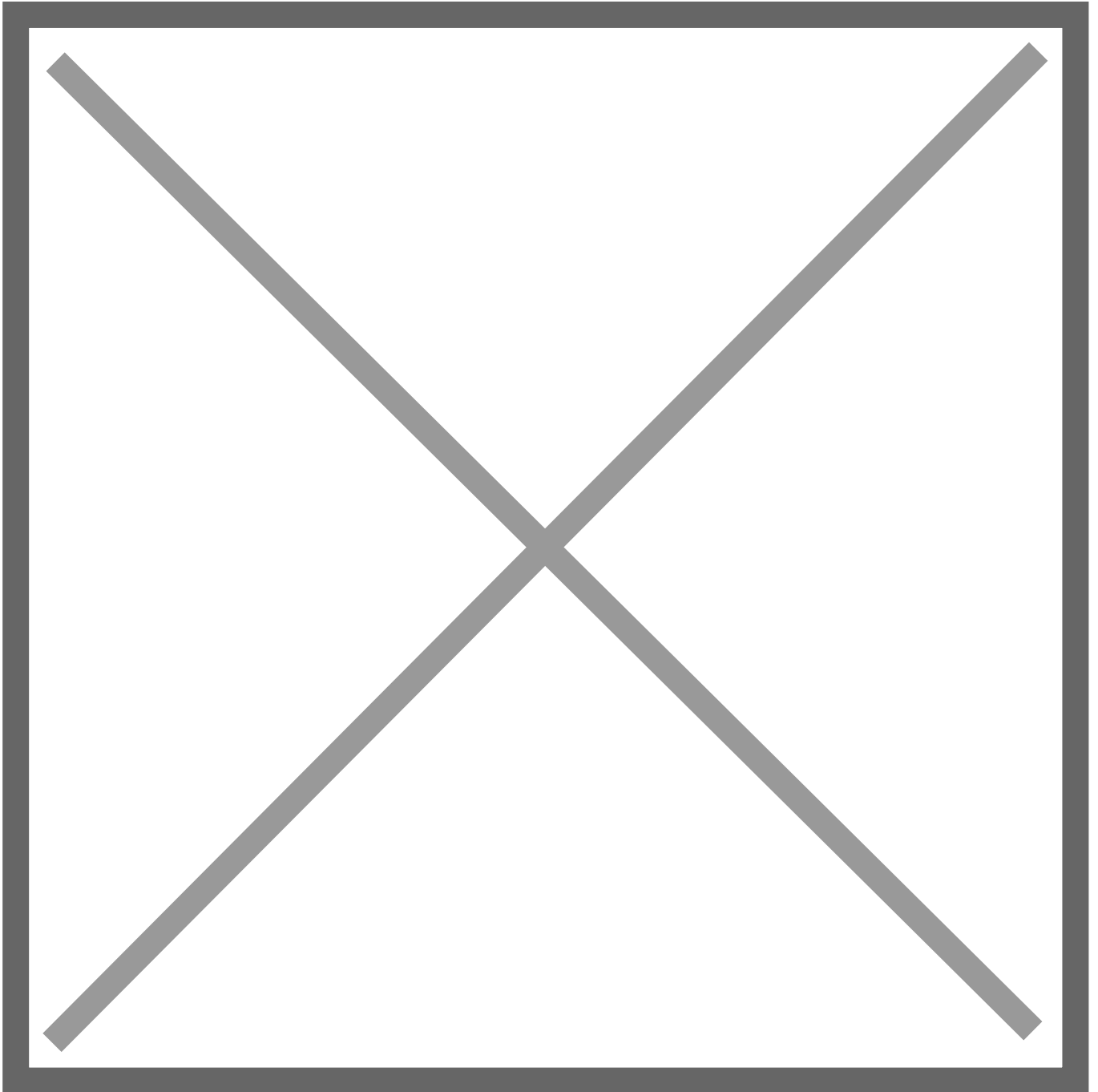
- To sort records on the Emails, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for Emails, Use Search engine on top
- Clicking on the pencil icon Emails list view page to the display of record edit view.

Compose Mail

Click the Compose Mail button or select Compose from the Sidebar to open a new compose window.

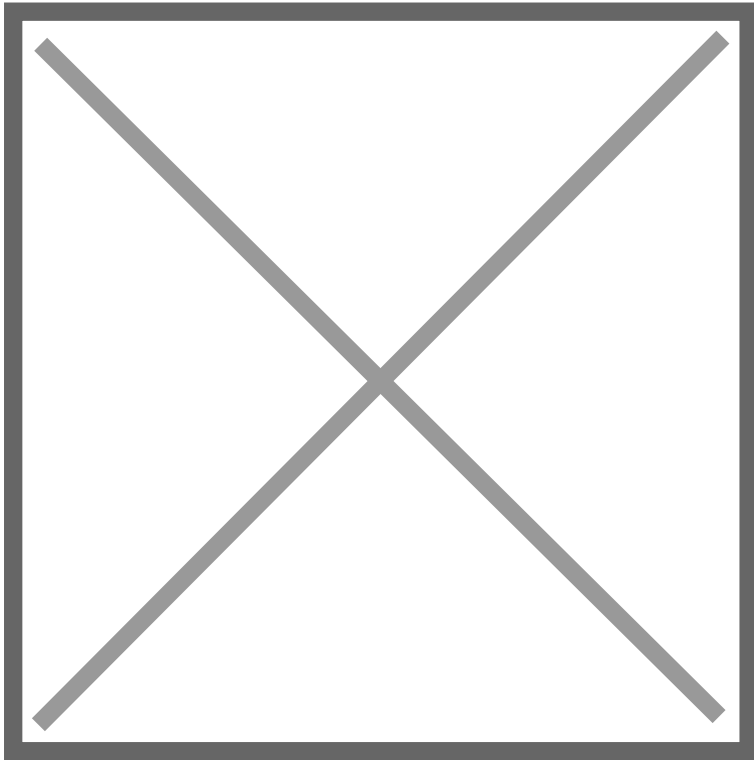
This will open the compose view in the Emails module. For new emails opened in this way, the To: field will be automatically populated and the email will be related to the relevant record.

- **Email Template:** Select a template if required. (Refer Email Templates for stored templates). Once you have selected a template, a popup will warn you that the subject line and body of the email will be replaced by the contents of the email template. If you are using a template with variables, these will be populated with the relevant data from the related record when the email is sent. The To: field will also be automatically populated with the email address associated with the related record.
- **Related To:** To associate the email with a particular record, select the module (e.g. Companies, Contacts, Leads) and then click the Search arrow to search for the record. Alternatively, you can begin typing the name into the field and select the relevant record from the auto-complete list which appears.



- **From:** If you have more than one email account configured, select the account from which to send the email. The Reply To and From settings for the selected Account are displayed alongside for information.
- **To:** Selecting a related record in the with a valid email address will automatically populate the To: field. Alternatively, the To:, Cc: and Bcc: fields can be populated manually or via the select buttons which appear when you click inside the fields.
- **Body:** Selected Email Template body load into the body or else without template body field remains empty.

Buttons in Compose Mail Page



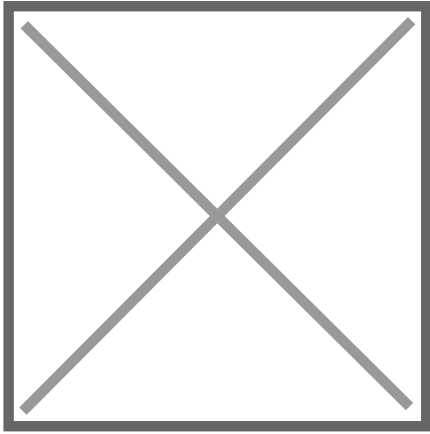
- **Send Mail:** A confirmation message will appear when the message has been sent.
- **Attach Files:** Use this button to browse for and attach an external file to the email.
- **Attach Documents:** Use this button to attach a Kiyocrm Document to the email. Search for the required Document in the popup and click Select to attach it.
- **Save Draft:** Drafts can be viewed by changing the folder in List view.
- **Discard :** Discards the draft email without sending.

Import Mail

Email can be imported into Kiyocrm and associated with a relevant Kiyocrm record (e.g. a contact or account record). This can be very useful in keeping a history of communication with a client, for example. Emails which have been imported and related to a record in Kiyocrm can be viewed from the record's history subpanel.

Import Single Mail

An individual email can be imported from a Detail view. Open the email, and then select Import from the Actions dropdown menu.

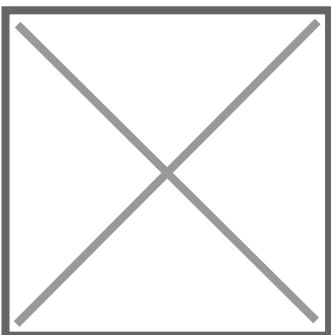


Detail View Actions

- **Reply:** Sends a response directly to the original sender of the selected message.
- **Reply All:** Sends a response to the original sender and all other recipients included in the message.
- **Forward:** Sends a copy of the selected message to a different recipient not originally included.
- **Delete From IMAP:** Permanently removes the selected message from the email server via the IMAP protocol.

Bulk Actions

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



- **Import:** Allows users to bring selected emails into the system for further processing or

recordkeeping.

- **Delete from IMAP:** Permanently removes selected emails from the IMAP email server.
- **Mark As Unread:** Changes the status of selected emails to unread, indicating they haven't been reviewed.
- **Mark As Read:** Marks selected emails as read, indicating they have been viewed or processed.
- **Mark As Flagged:** Flags selected emails for follow-up or attention.
- **Mark As Unflagged:** Removes the follow-up flag from selected emails.

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 #3

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