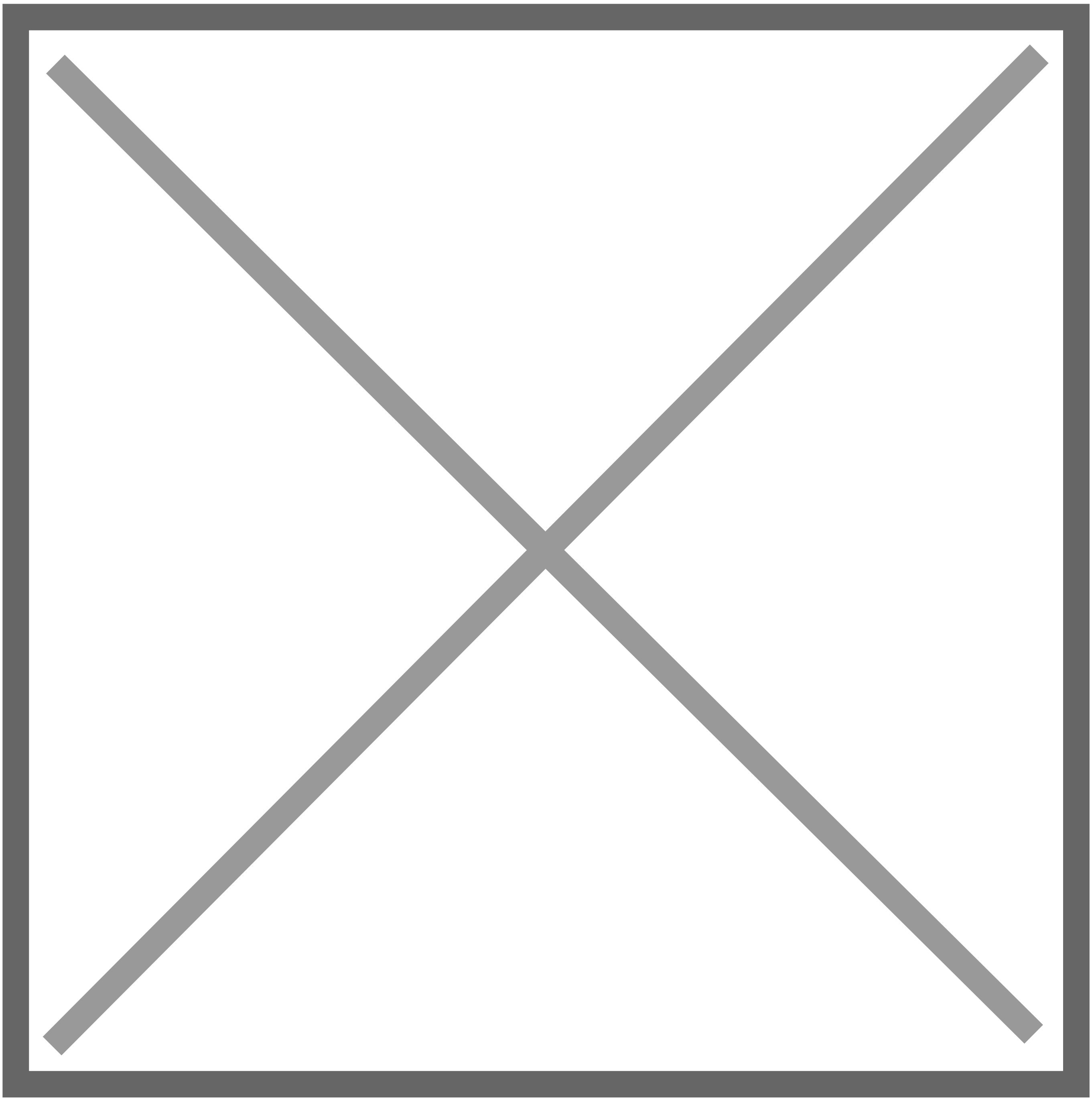
Leads

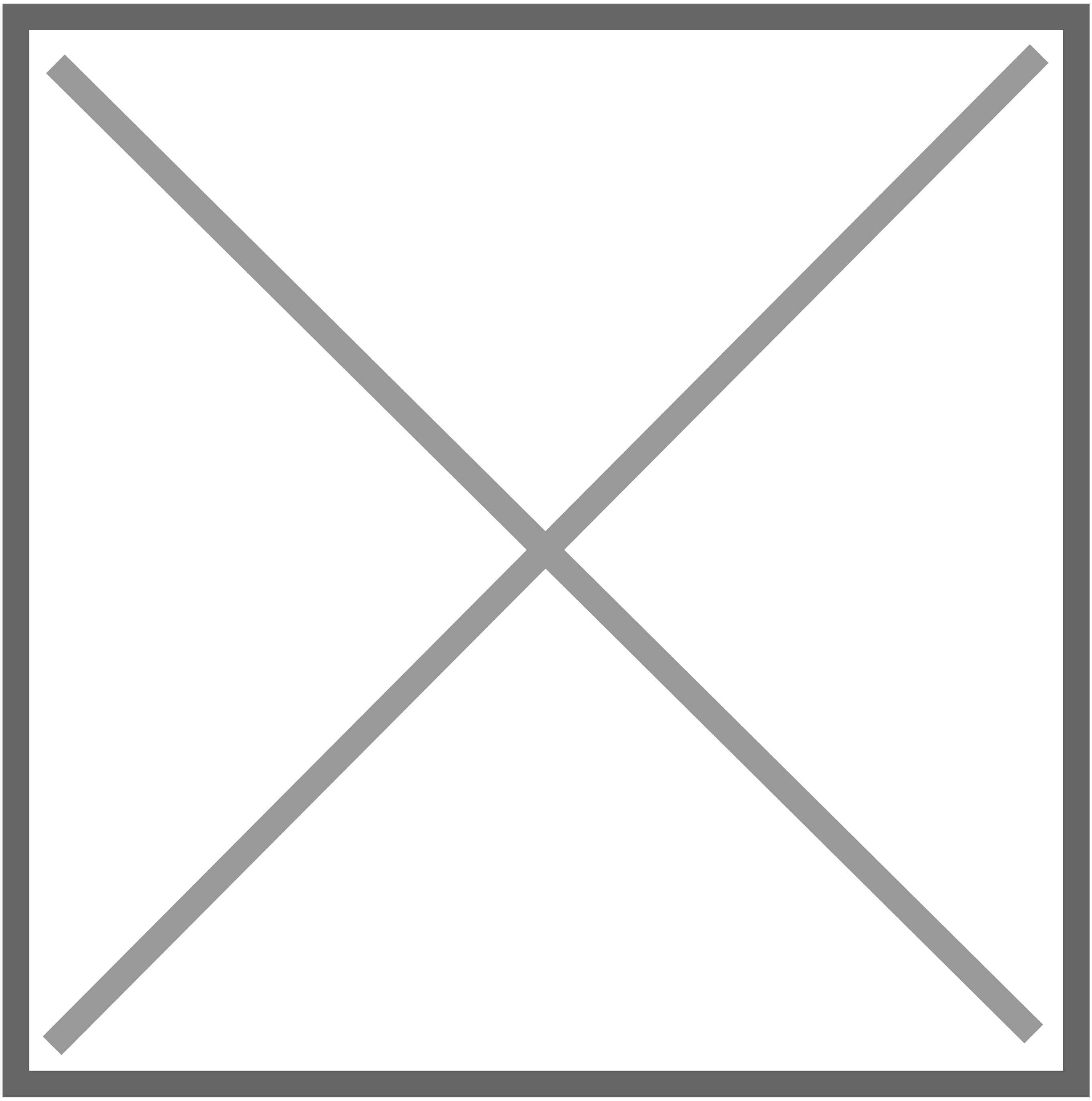
The Leads module in KiyoCRM allows users to capture, track, and manage potential clients throughout the sales funnel.

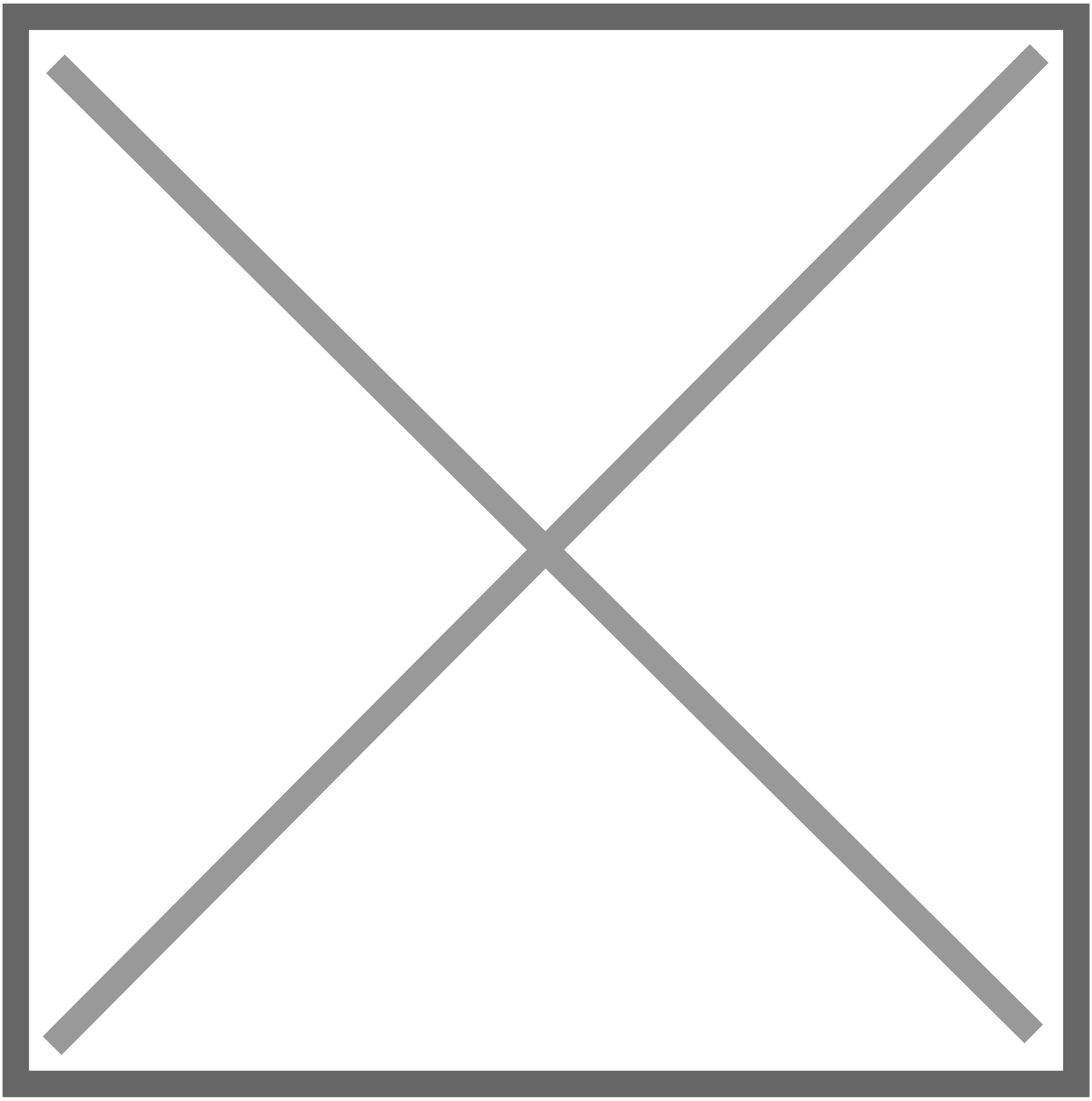


List View Actions

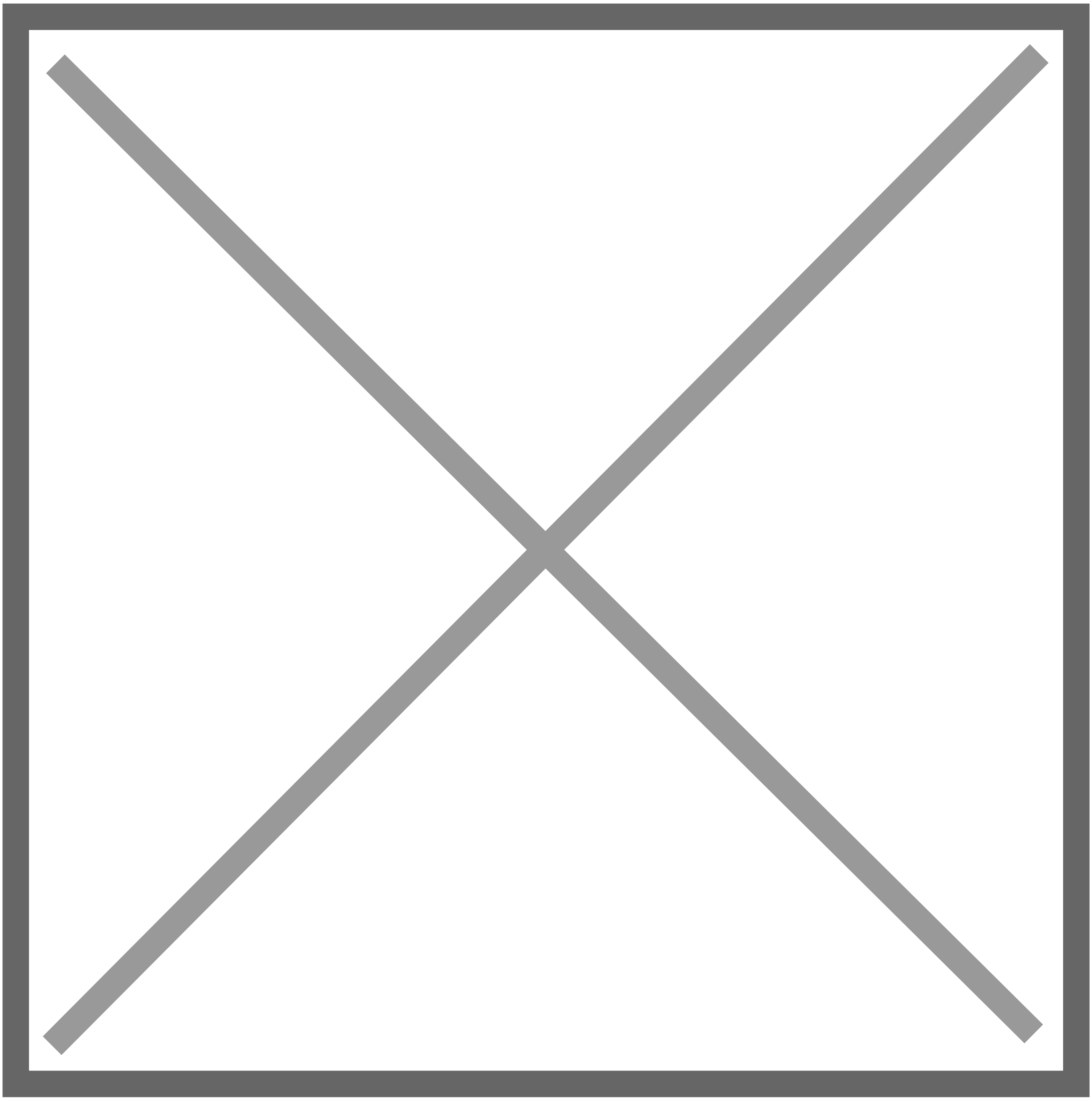
Lead Creation:

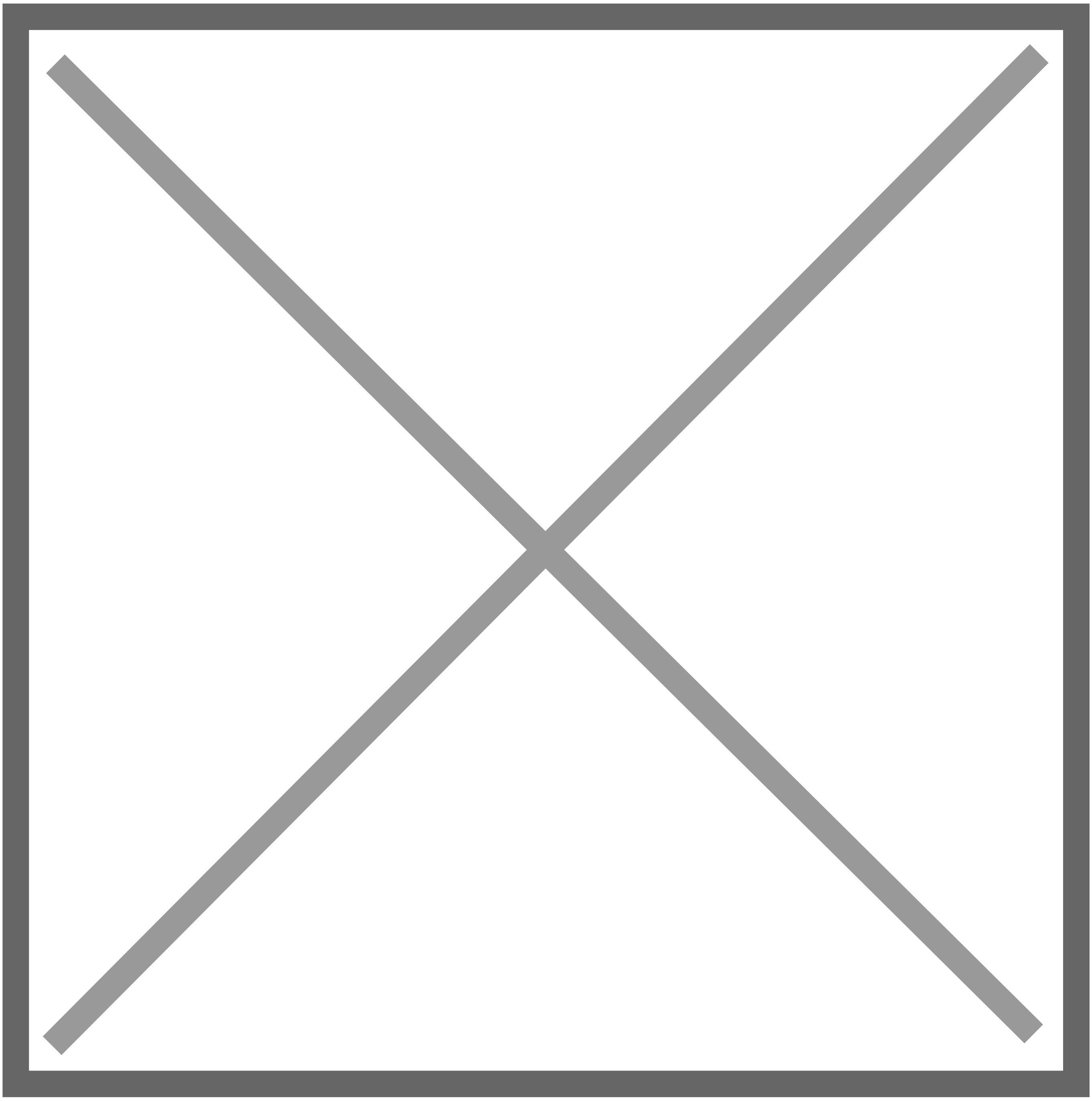
Click **+ Create Lead** to manually add new leads.



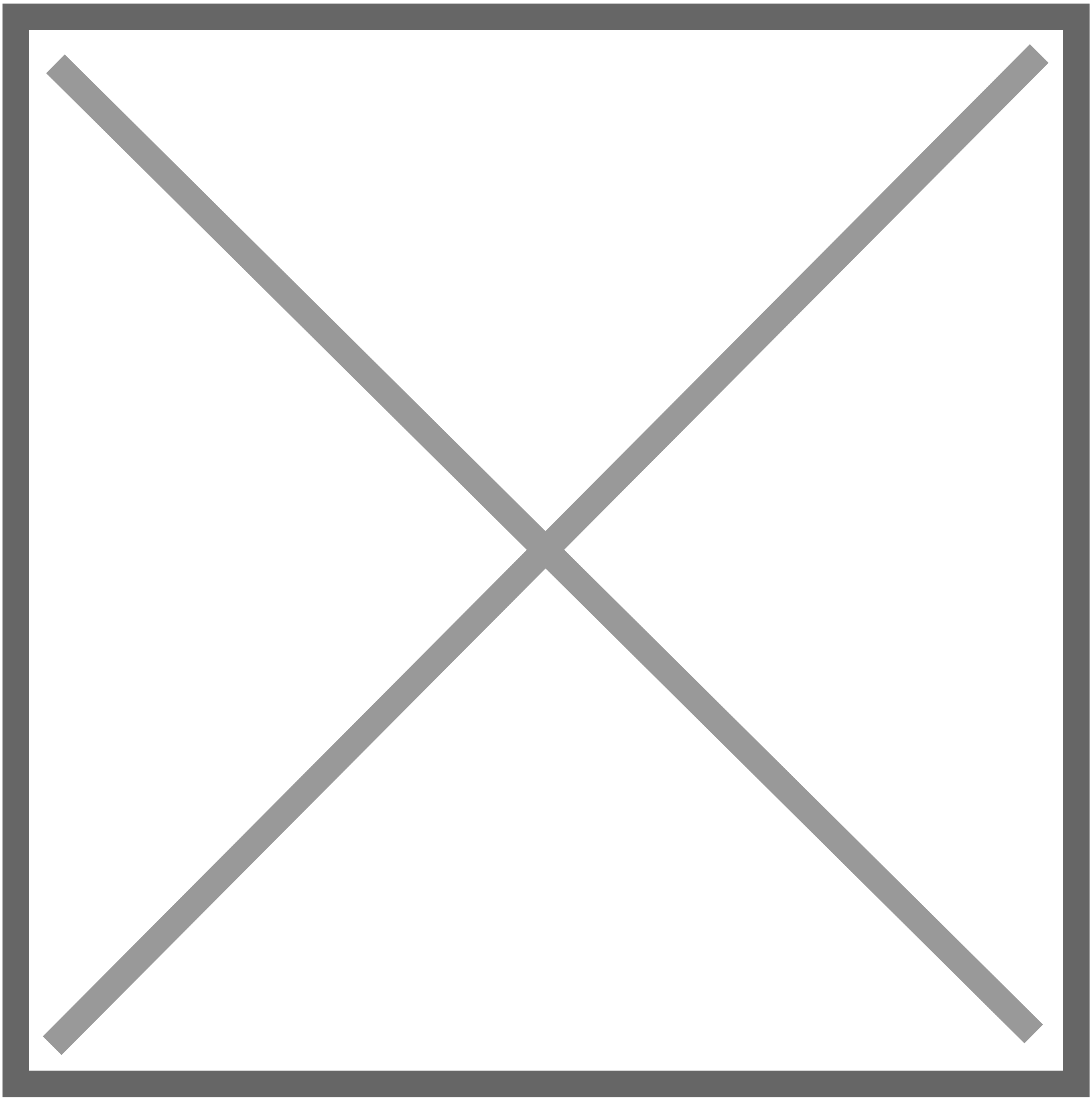


- Options for importing leads from external sources (.CSV file). Can download sample file using Download Sample Import File Template



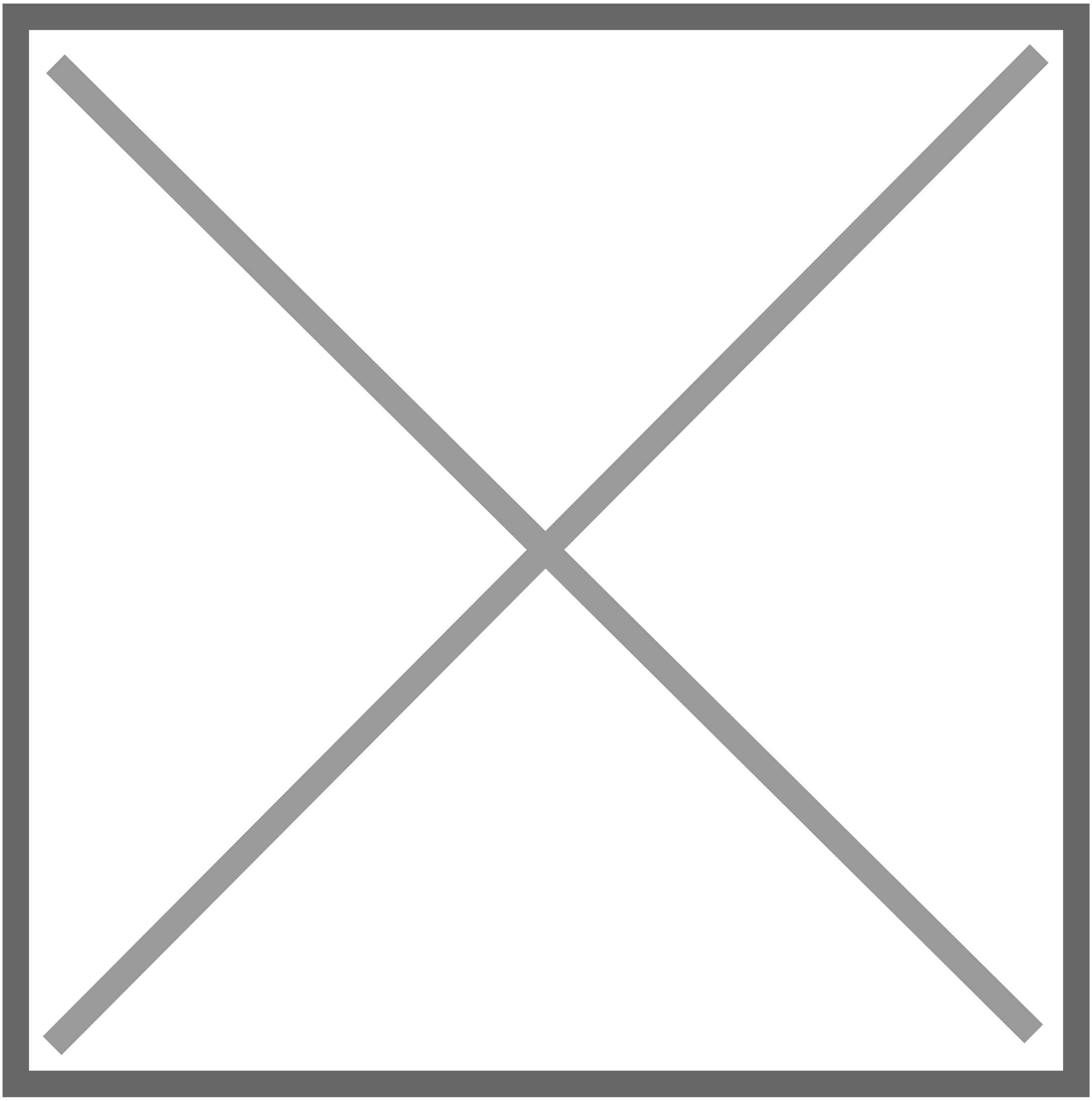


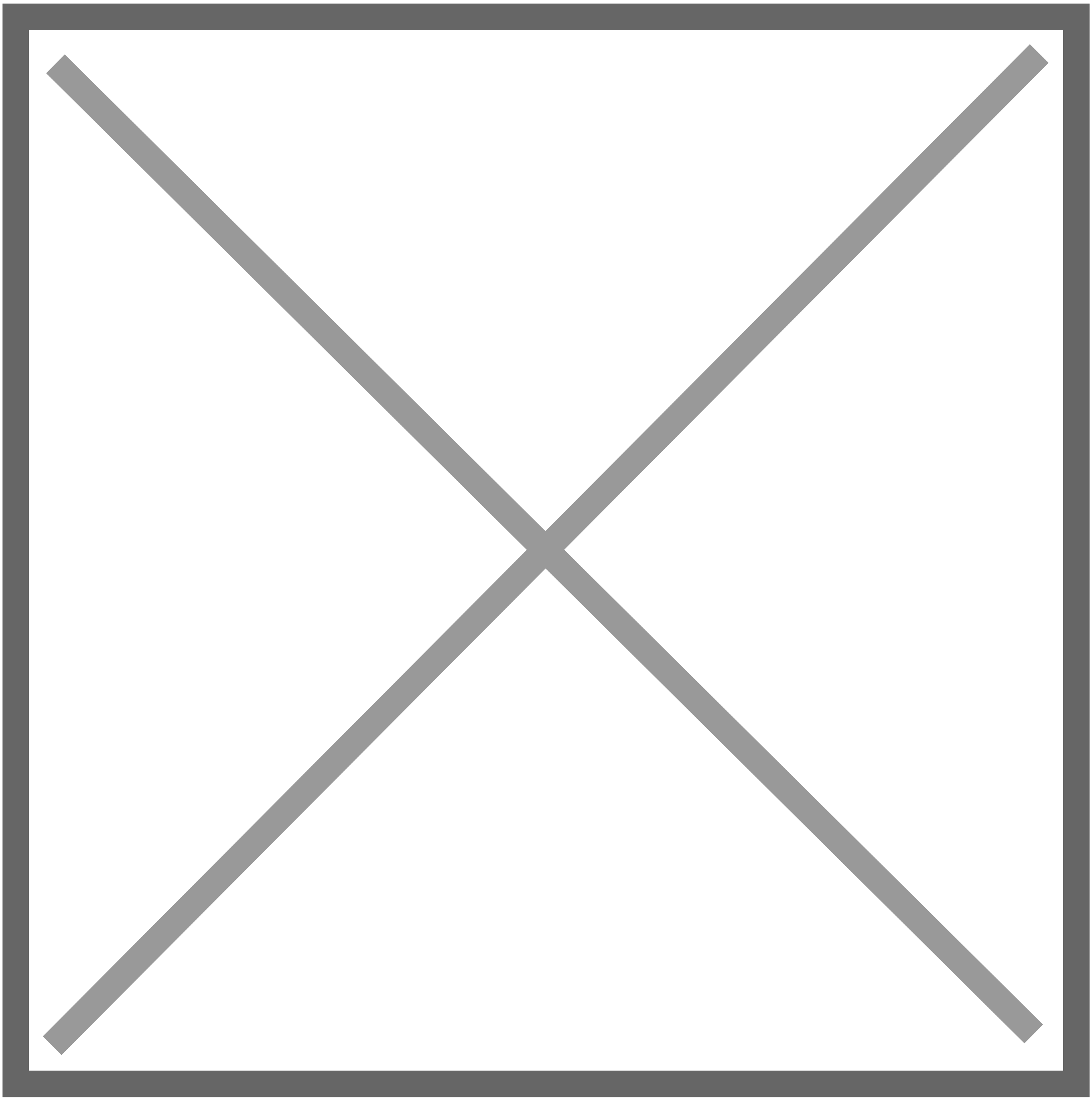
- Lead creation via web forms or integrations is also supported through Campaigns



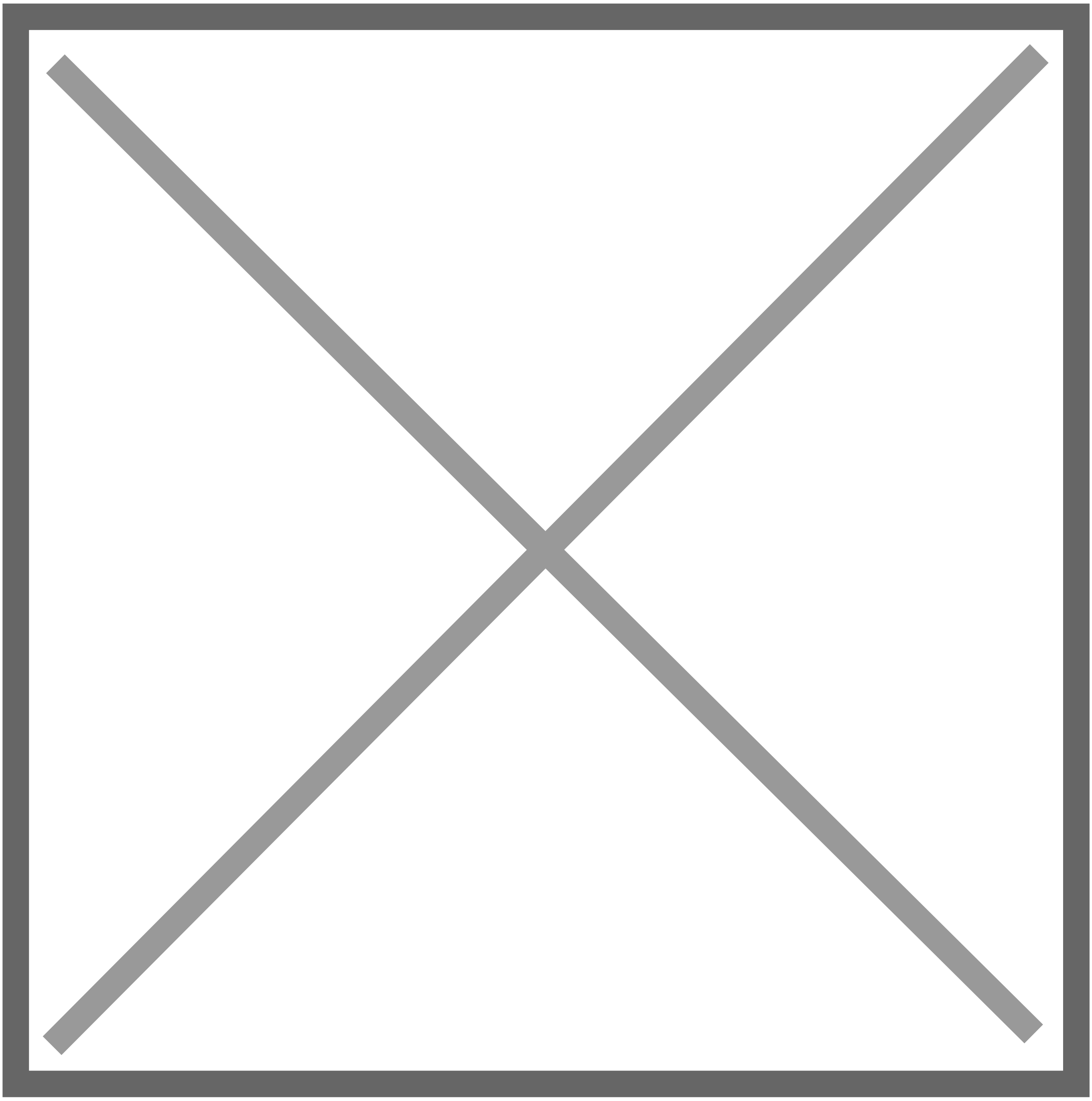
2.Lead Views

- **List View:** Displays all leads with columns such as Name, Status, Company, Phone, Email, and Assigned User.
- **Kanban View:** Visual workflow by lead status (New, Assigned, In Process, etc.).



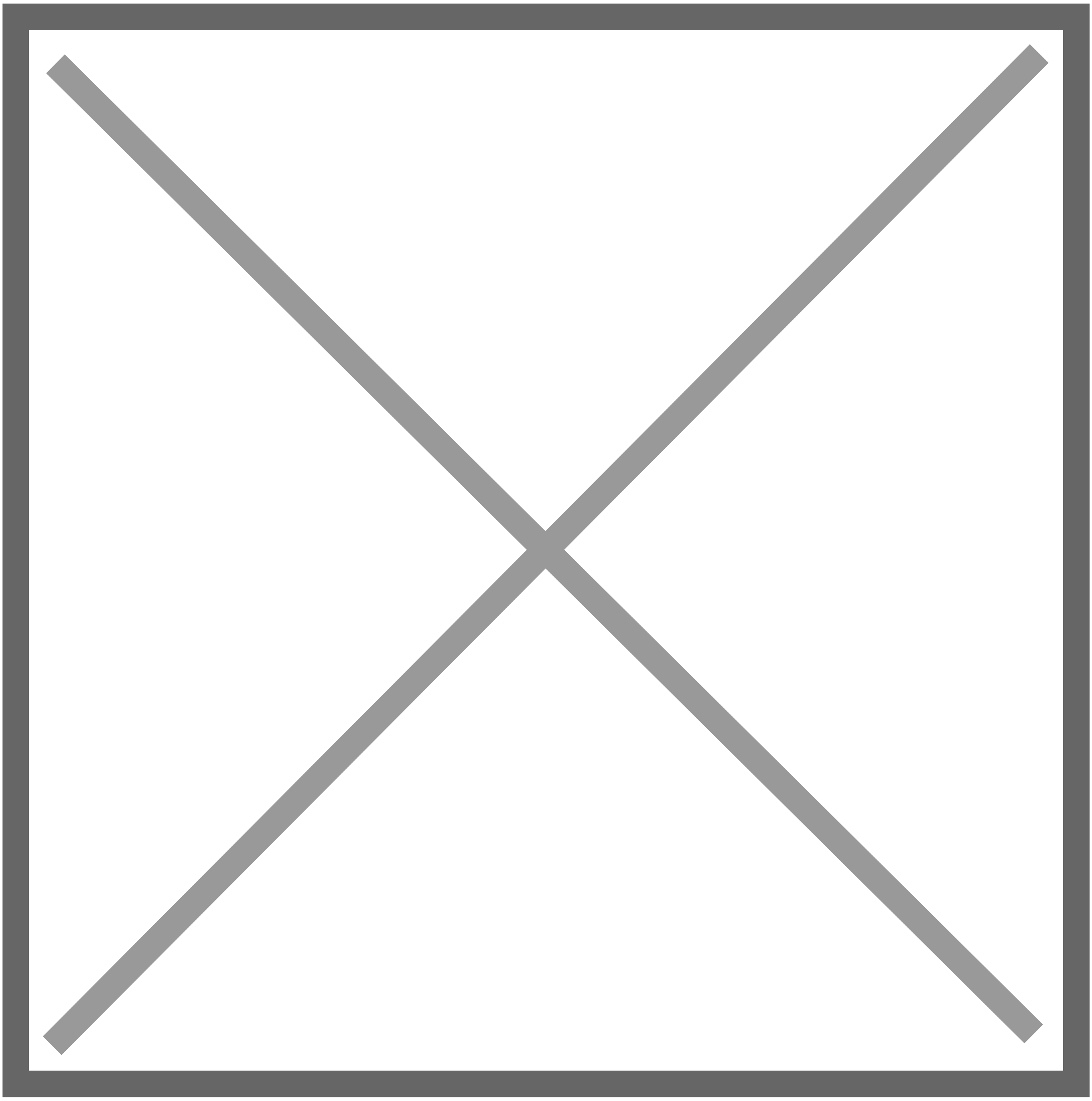


Note: Set the filter by changing kanban settings using Settings icon on the top right side



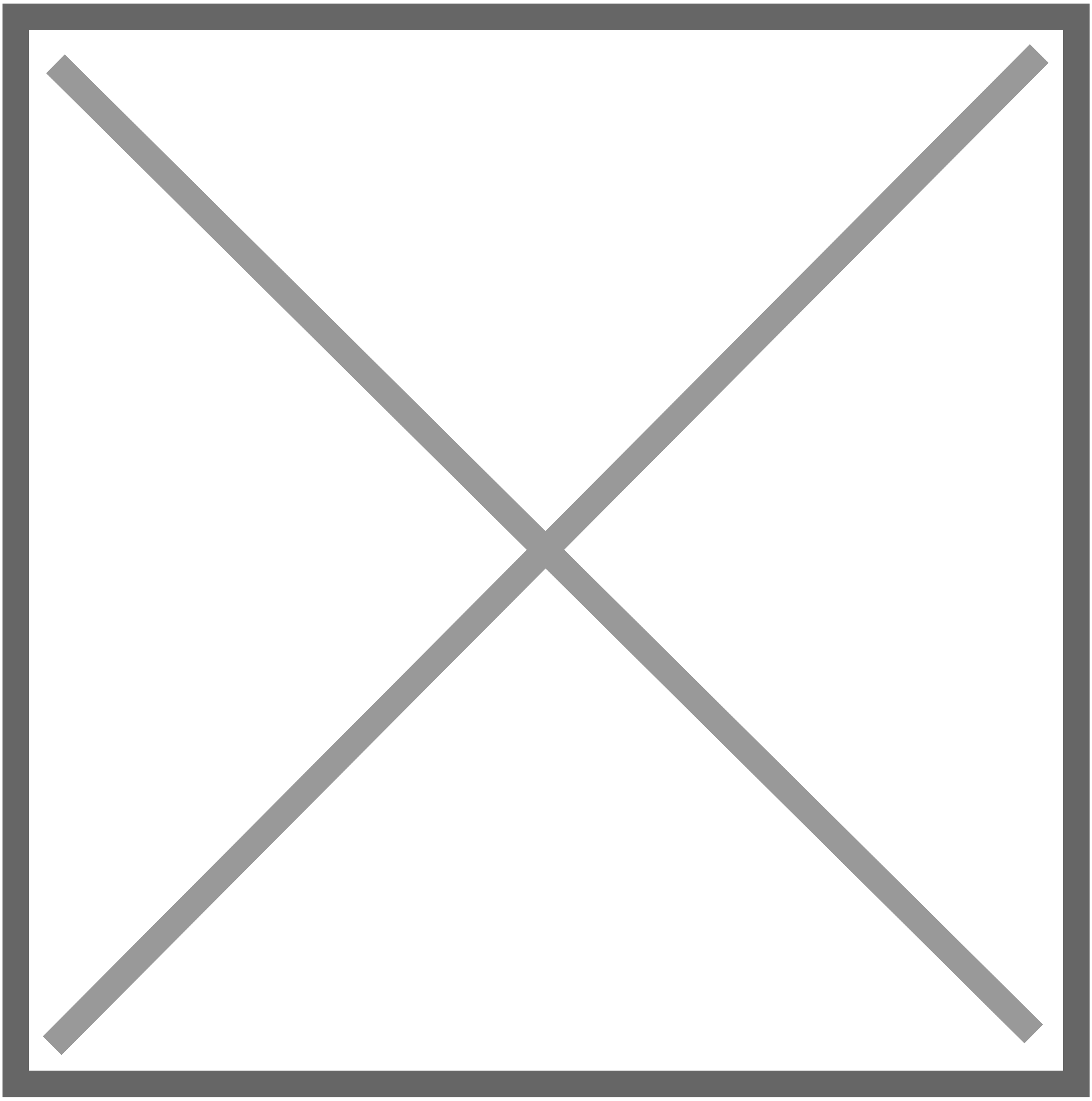
3. Lead Status Tags:

- Easily identify progress with colored labels:
  - New, Converted, Assigned, In Process, Recycled, Dead etc



4. **Filters and Sorting**:

- Use the Filters section to segment data (e.g., by user, status, company). Having Quick filter and Advanced filter options



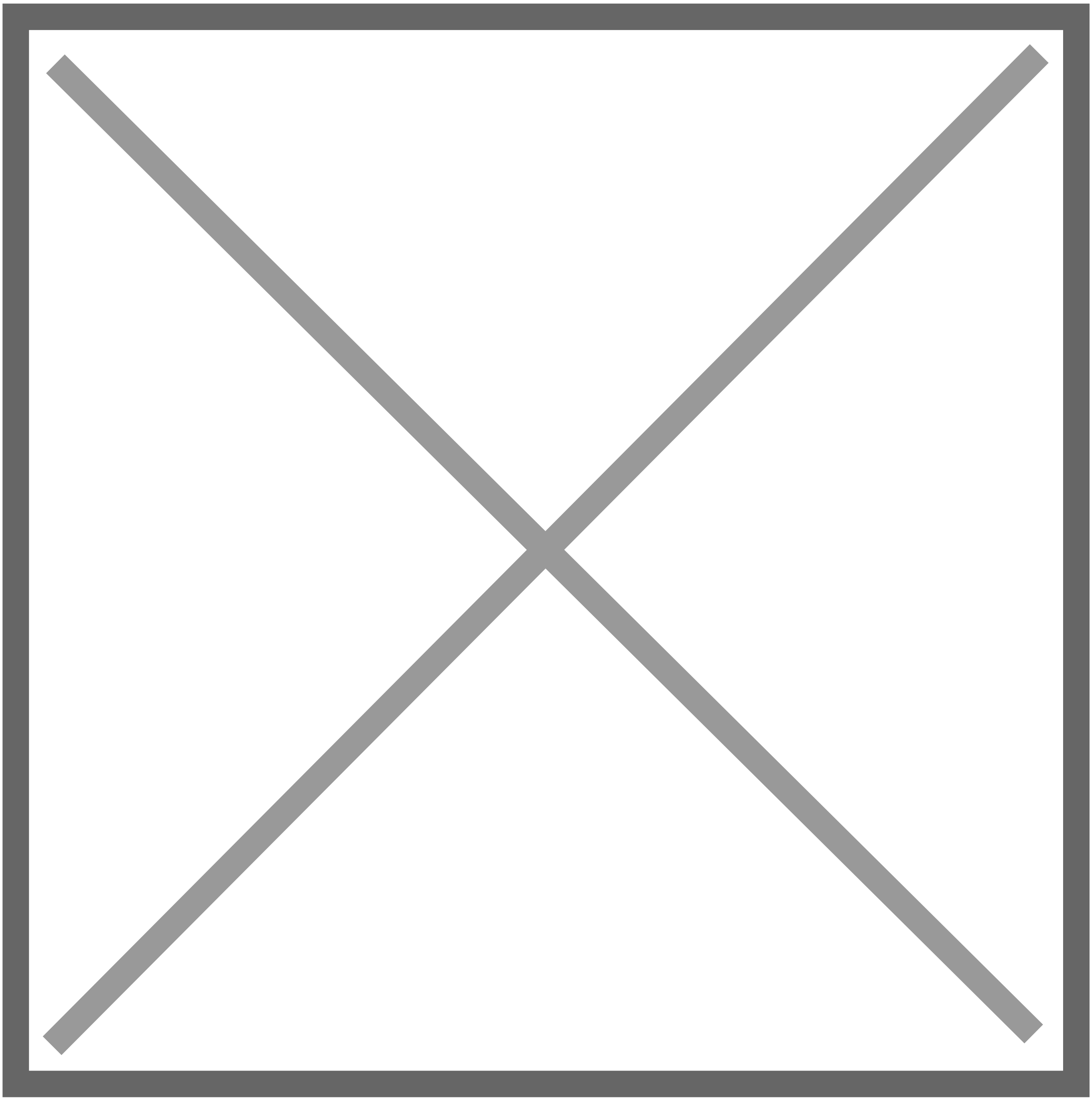
Quick Filter

The Quick Filter feature in KiyoCRM provides a fast and user-friendly way to narrow down lead records based on basic criteria without needing complex conditions.

Available Filter Options:

- Name: Search leads by entering all or part of the name.
- Open Items: Check this to view only active or unresolved leads.
- My Items: Filters to display only leads assigned to the currently logged-in user.
- My Favorites: Shows leads marked as favorites by the user.

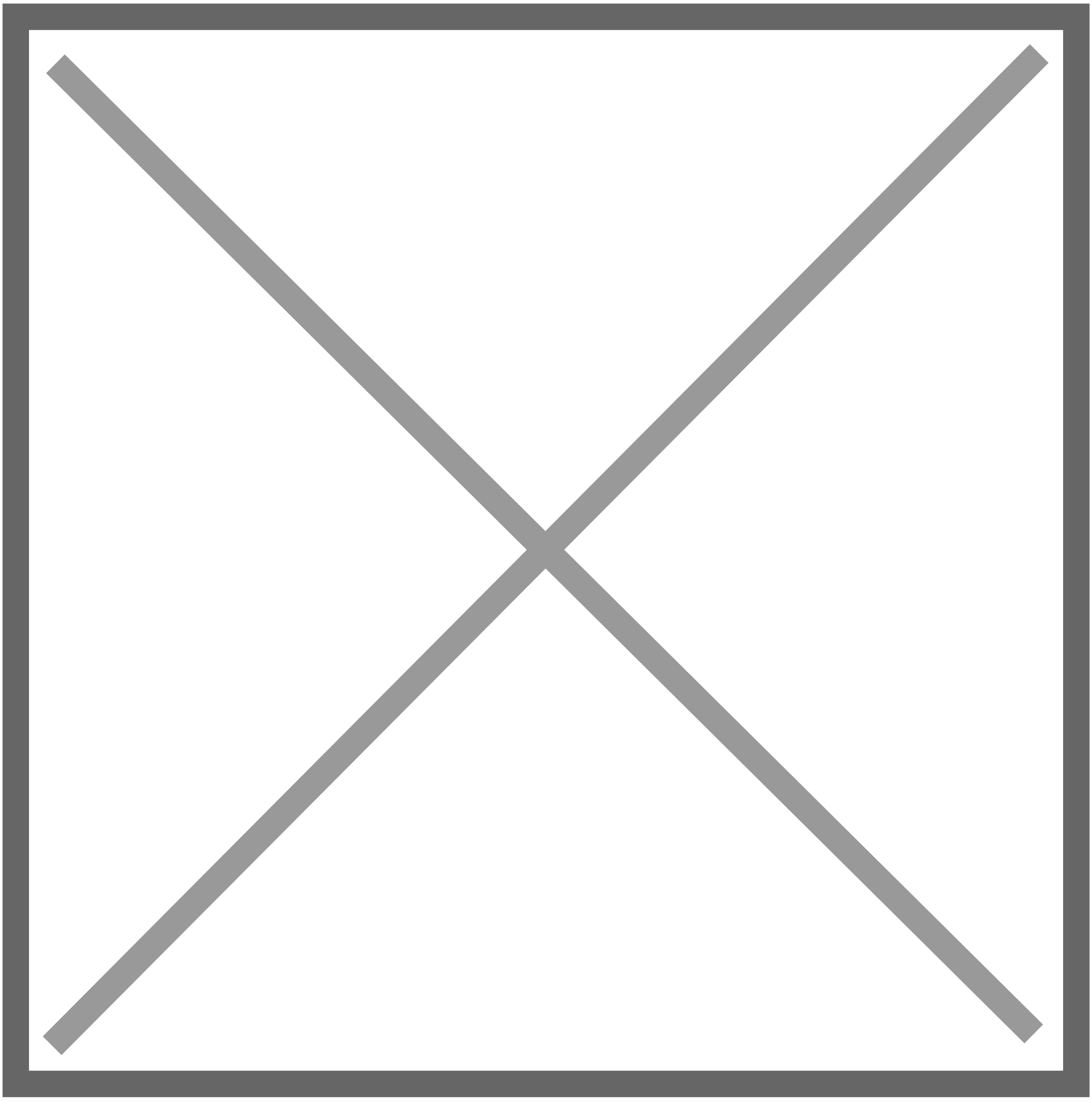
Once criteria are selected, click Search to apply the filter and instantly update the leads list.



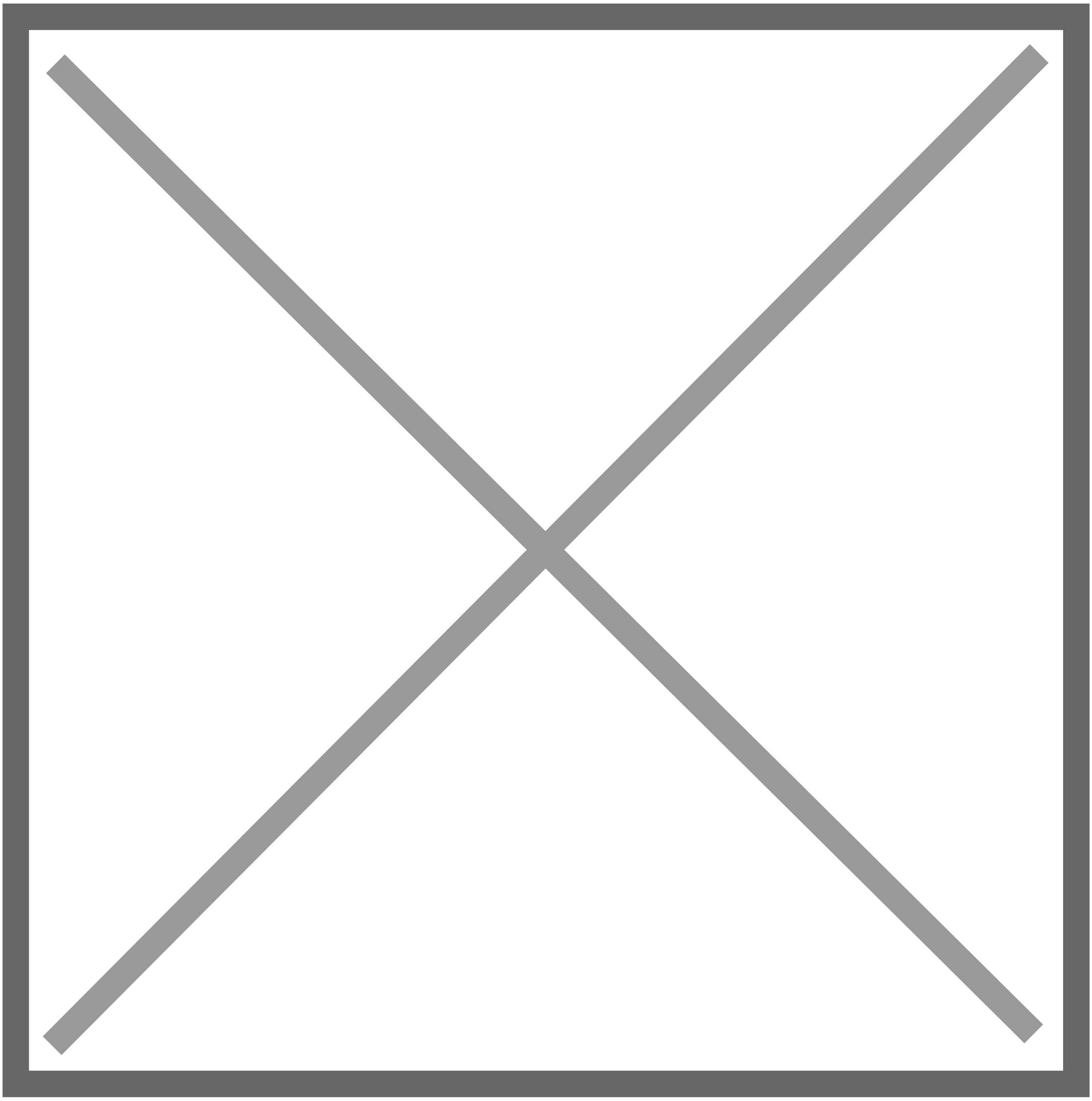
The Advanced Filter provides a comprehensive set of fields to refine lead searches based on contact details, company information, status, source, and assignment.

Sorting & Saving:

- Save your custom filter with a name for reuse by selecting saved filter from My Filters dropdown
- Sort results by a selected column in Ascending or Descending order.

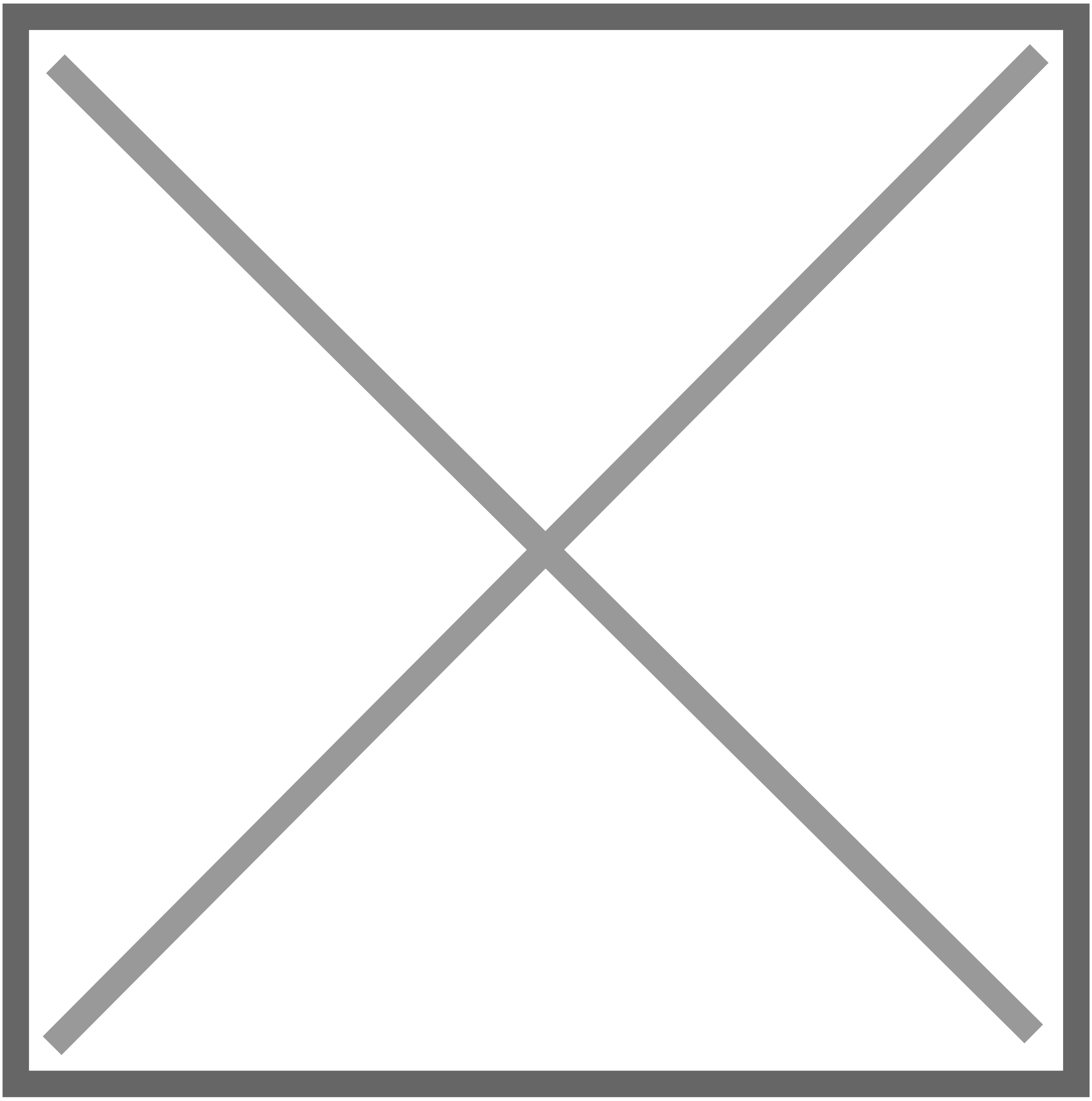


Saved filters, recently viewed records list and favourite records displayed in the sidebar.



User Assignment:

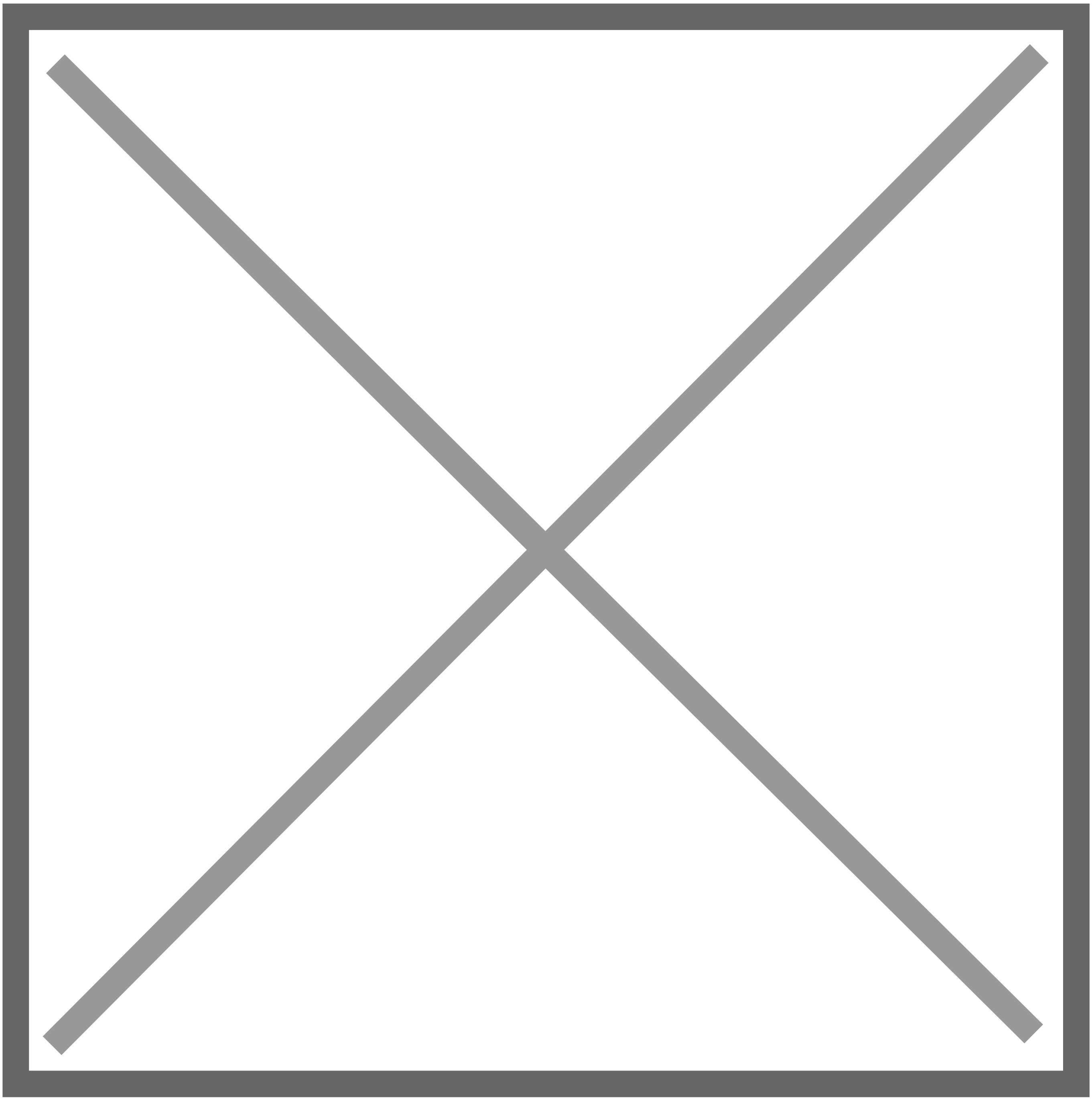
- Each lead is assigned to a CRM user for follow-up and activity tracking.



Quick Contact Options

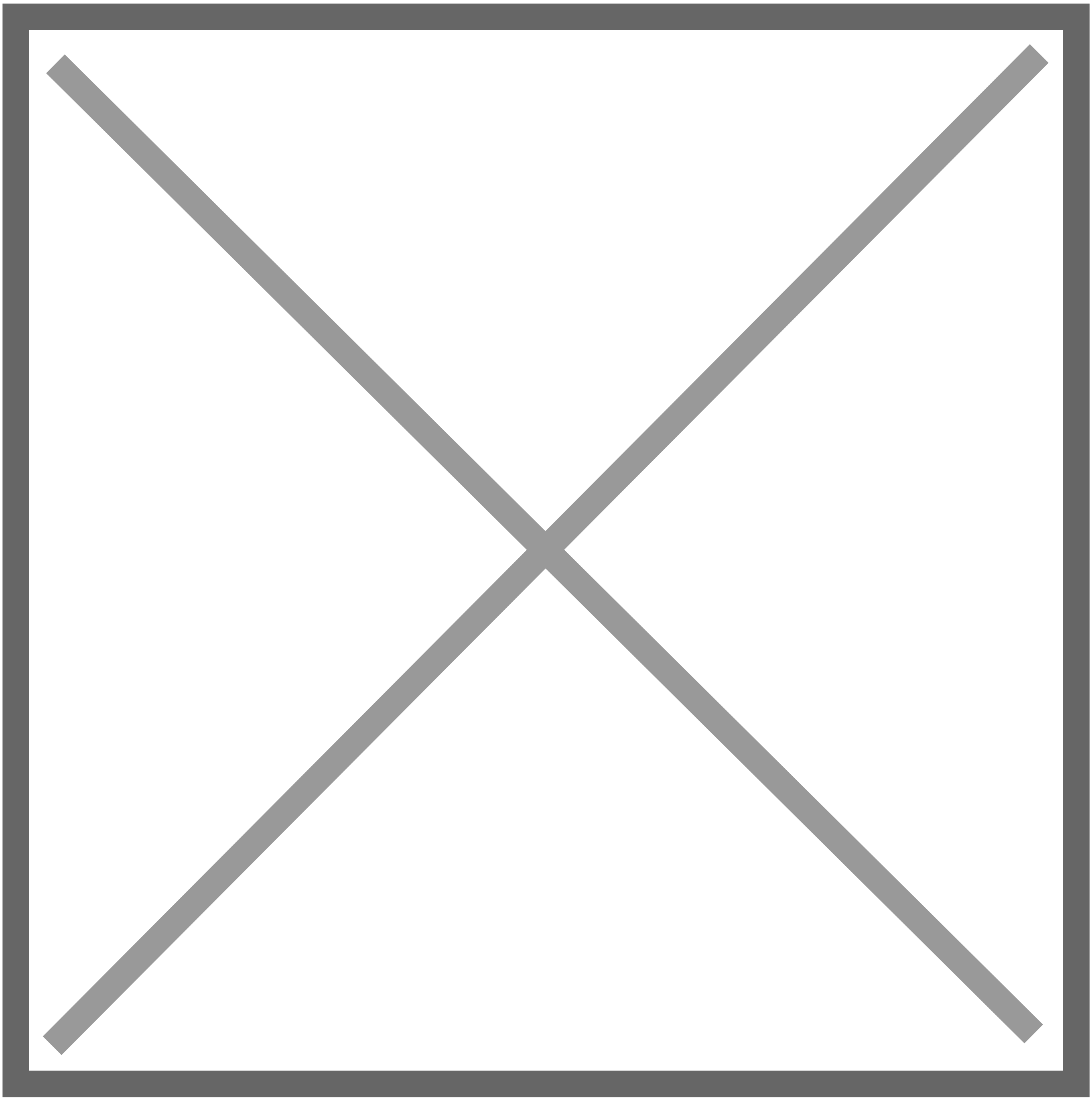
- **Click-to-call, WhatsApp**, and **SMS** icons available for quick contact. Record history will be tracked under the History Submodule of detail view.

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

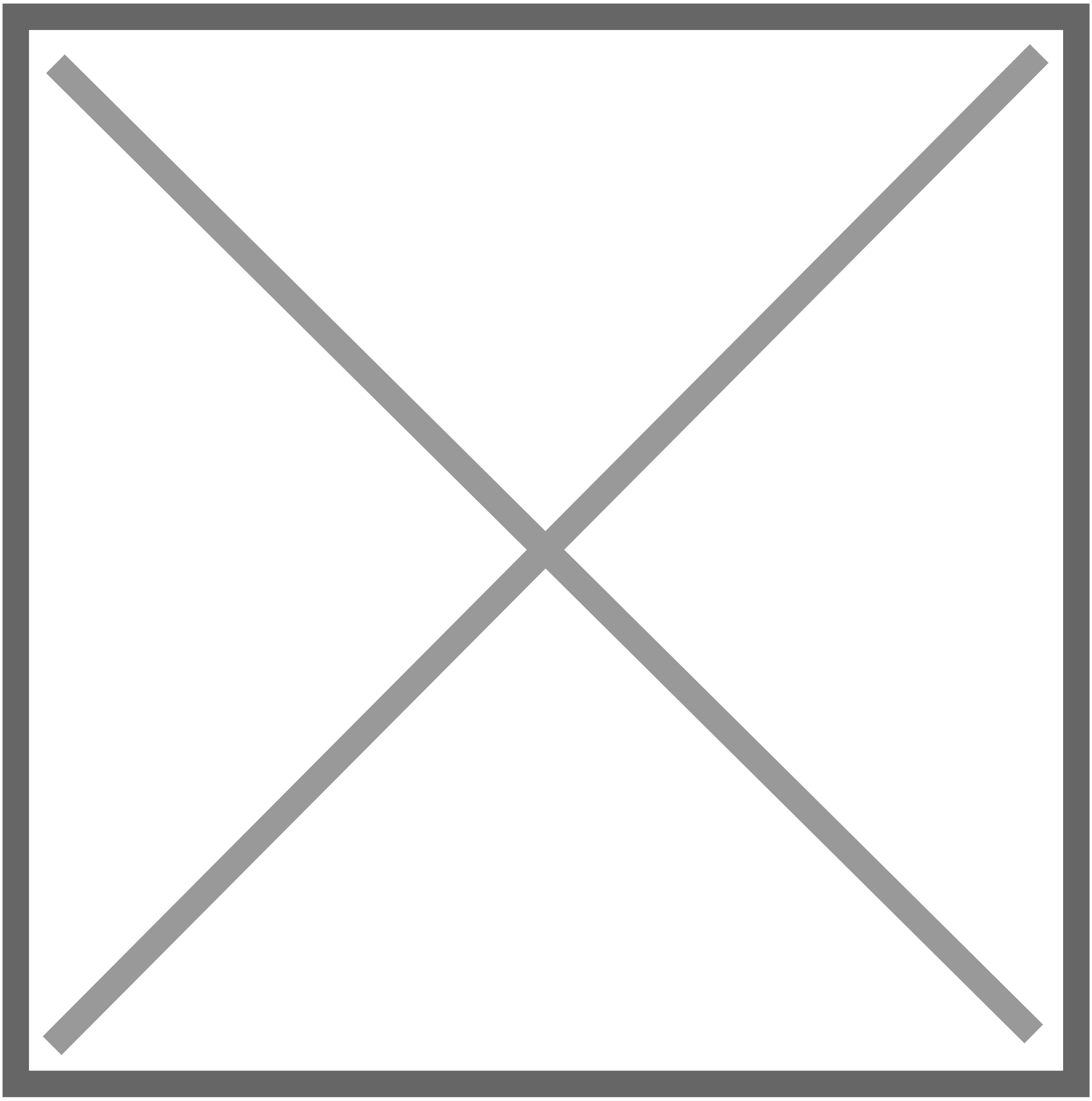


Search and Navigation:

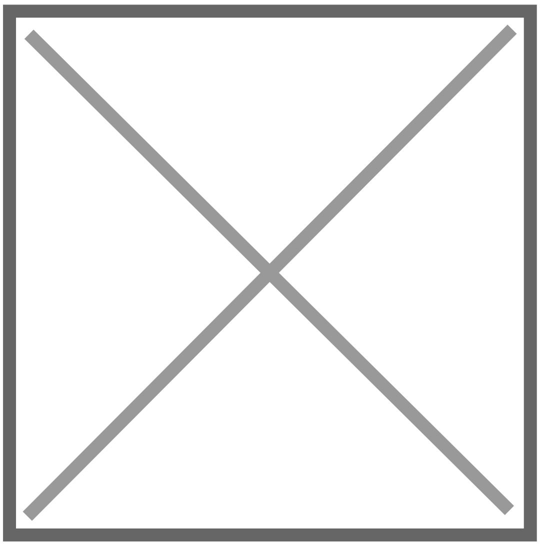
- Use the global Elastic Search bar to instantly locate any lead by name, phone, email, or keyword.



- To sort records on the Leads List View, click any column title which is sortable. This will sort the column either ascending or descending



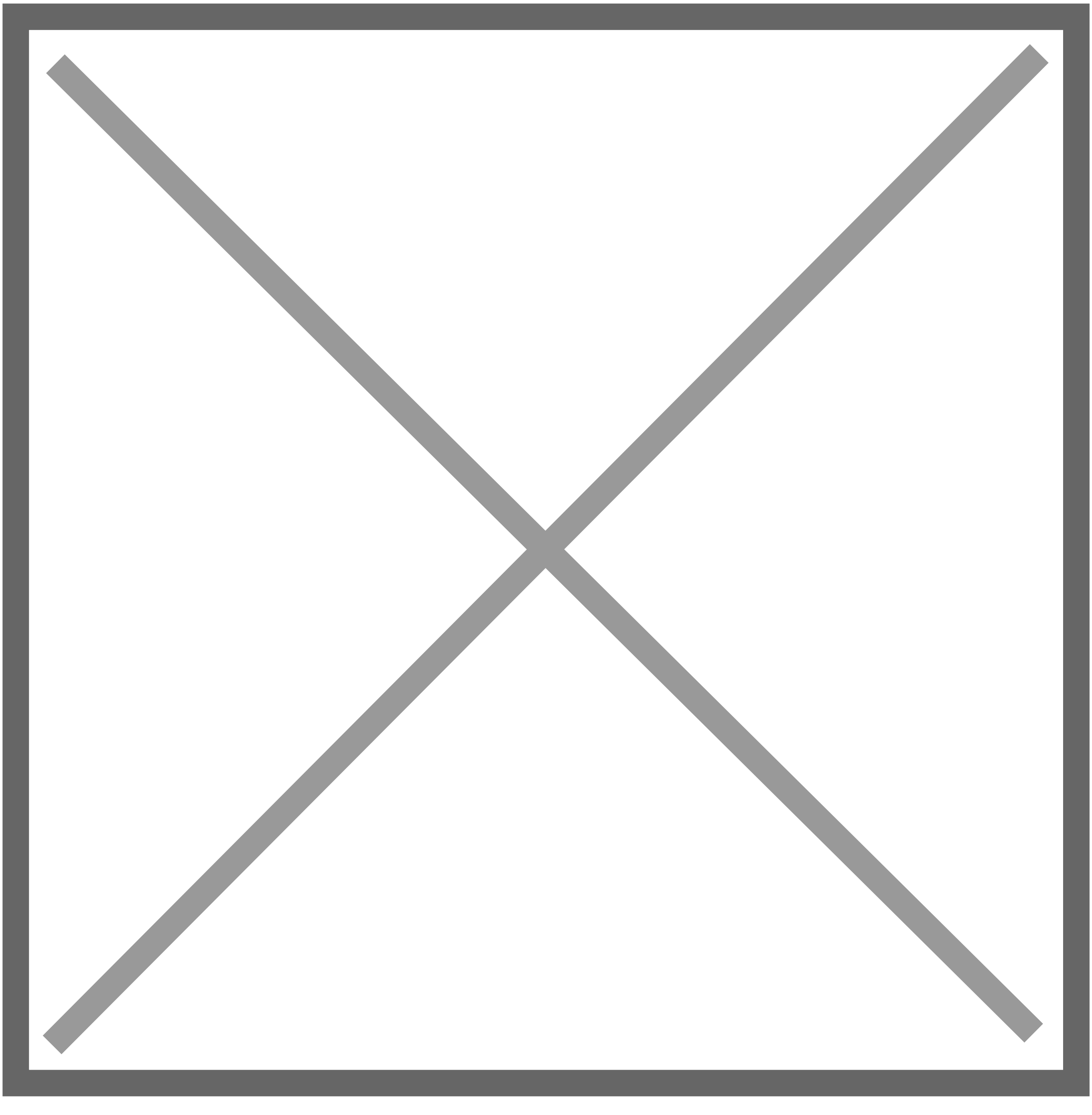
- Clicking on the pencil icon on leads list view page to the display of record edit view.
- ‘i’ icon in the leads list view page gives the additional details of the lead.

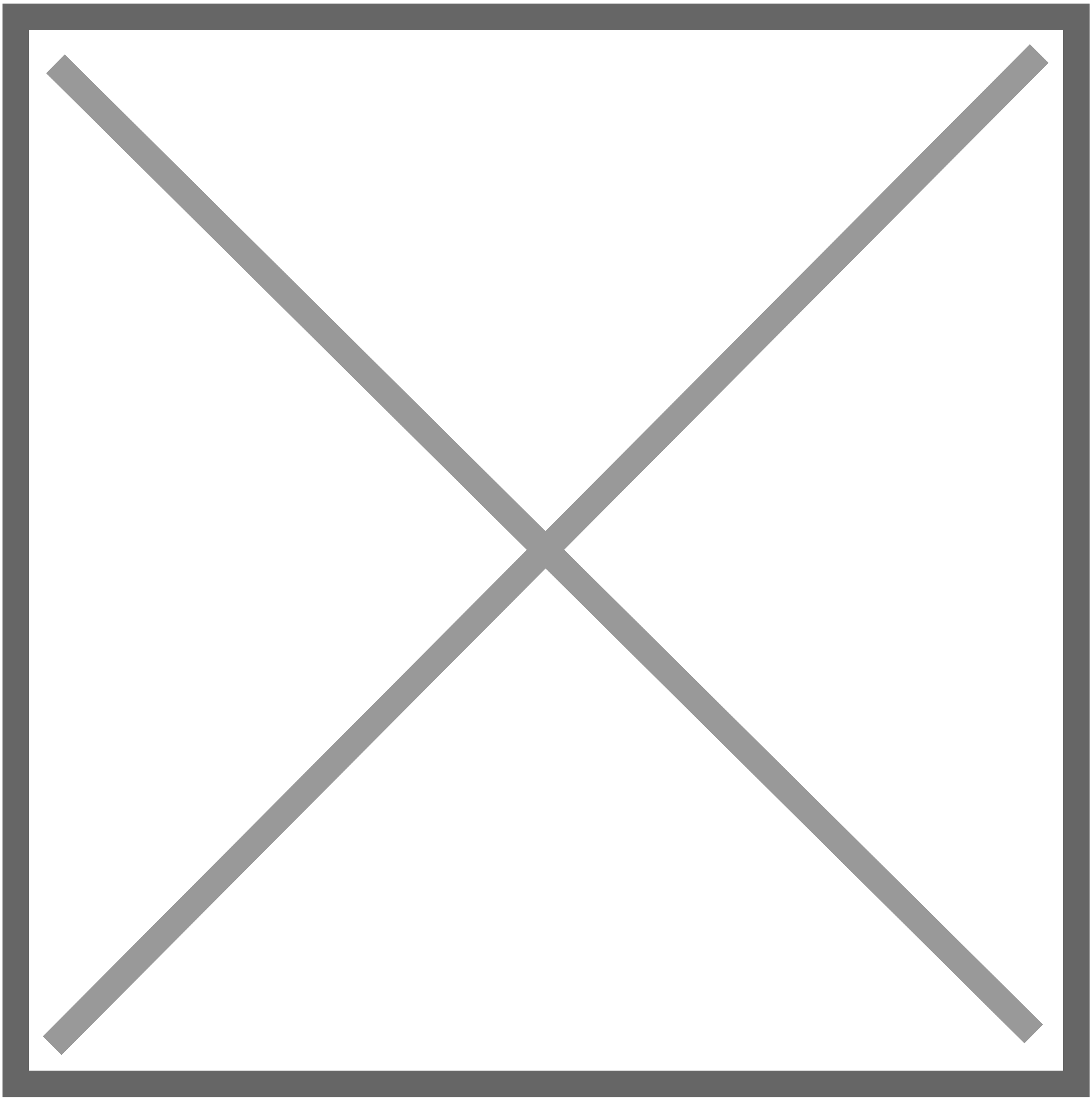


Leads Bulk Actions

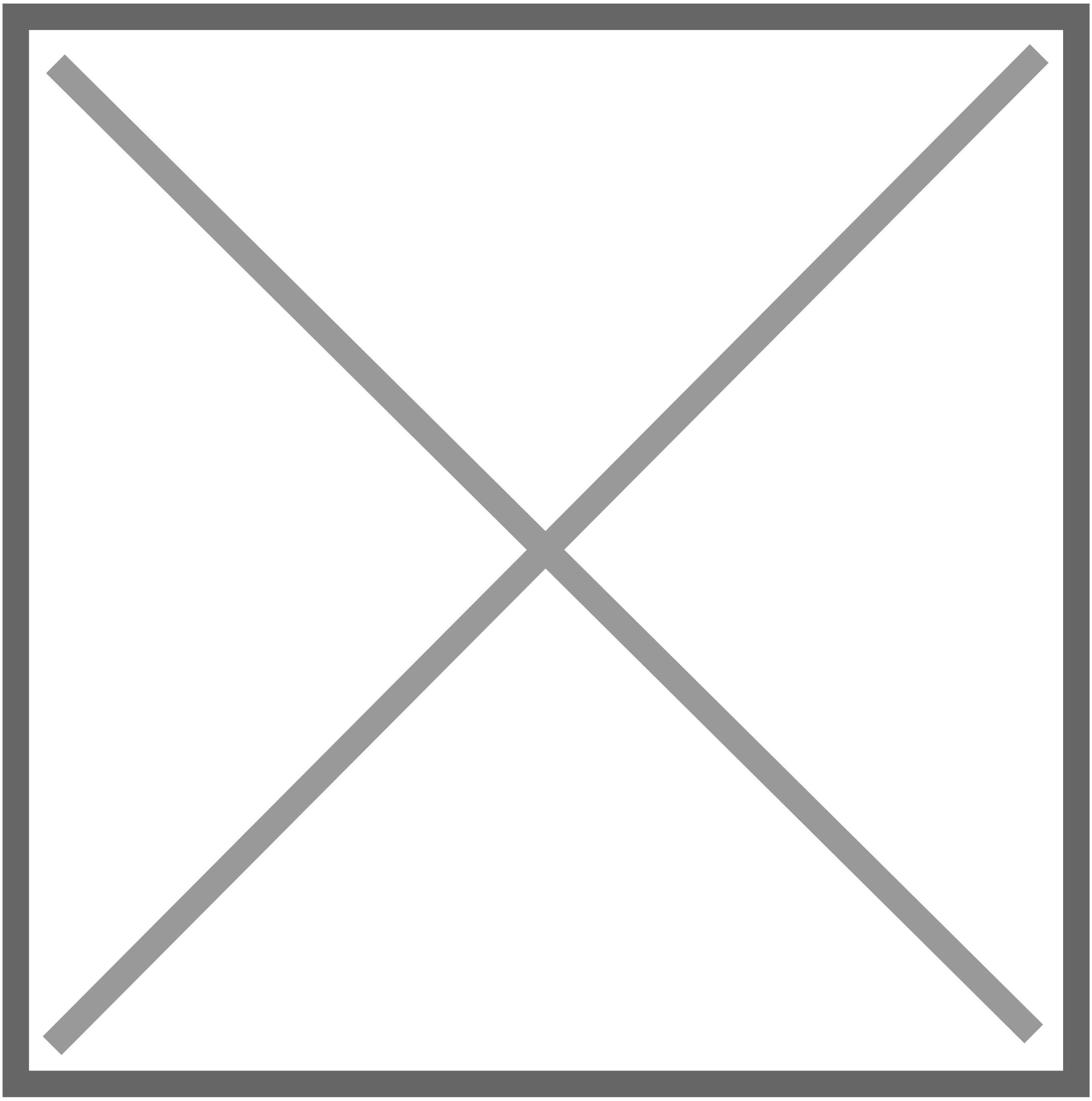
In list view, Select group of records by checking the checkbox, the actions are as follows:

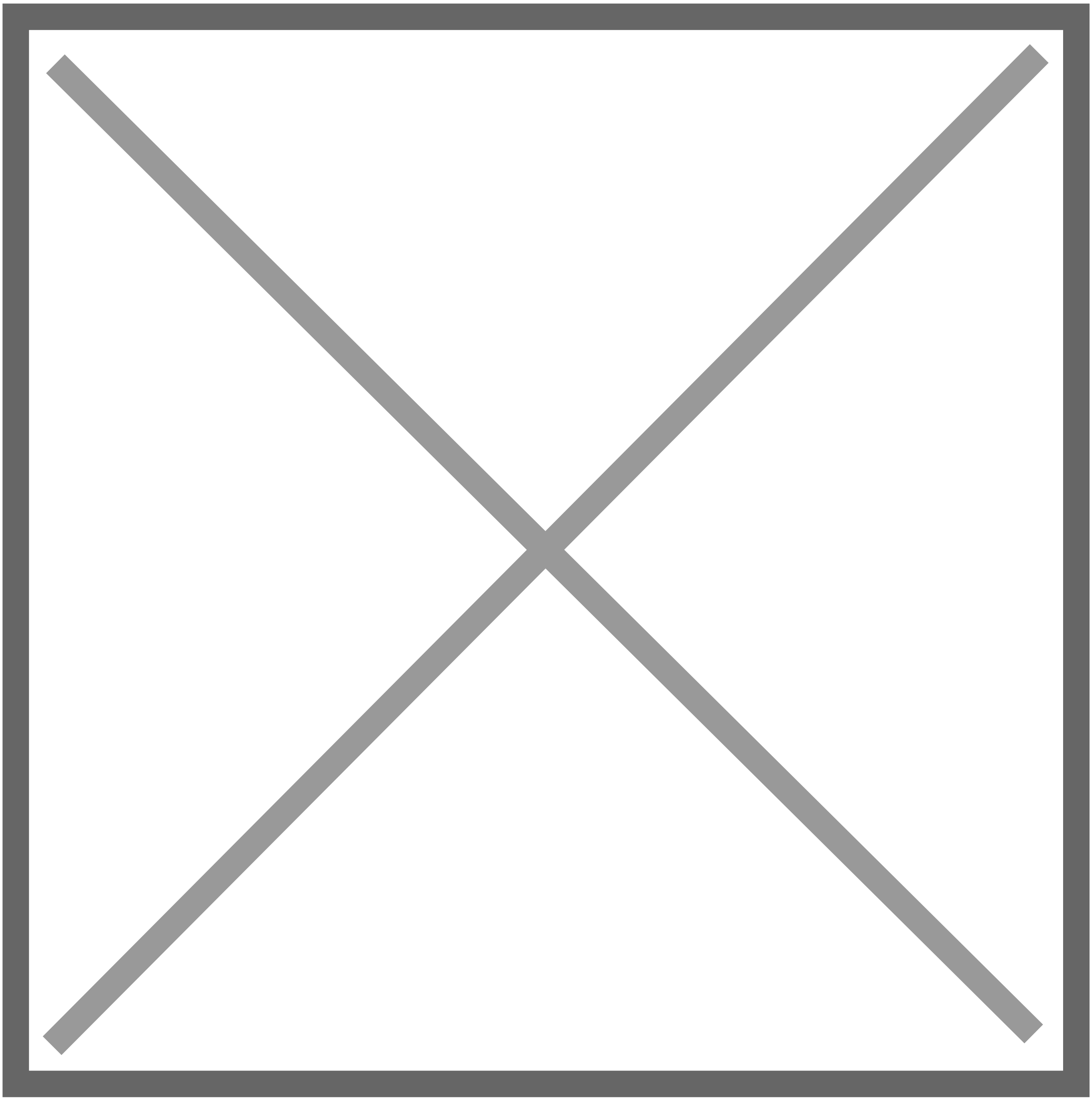
1. Mass Update —-- To update some or all the Leads on the List View, use the Mass Update panel as described in the Mass Update of Records section of this user guide.



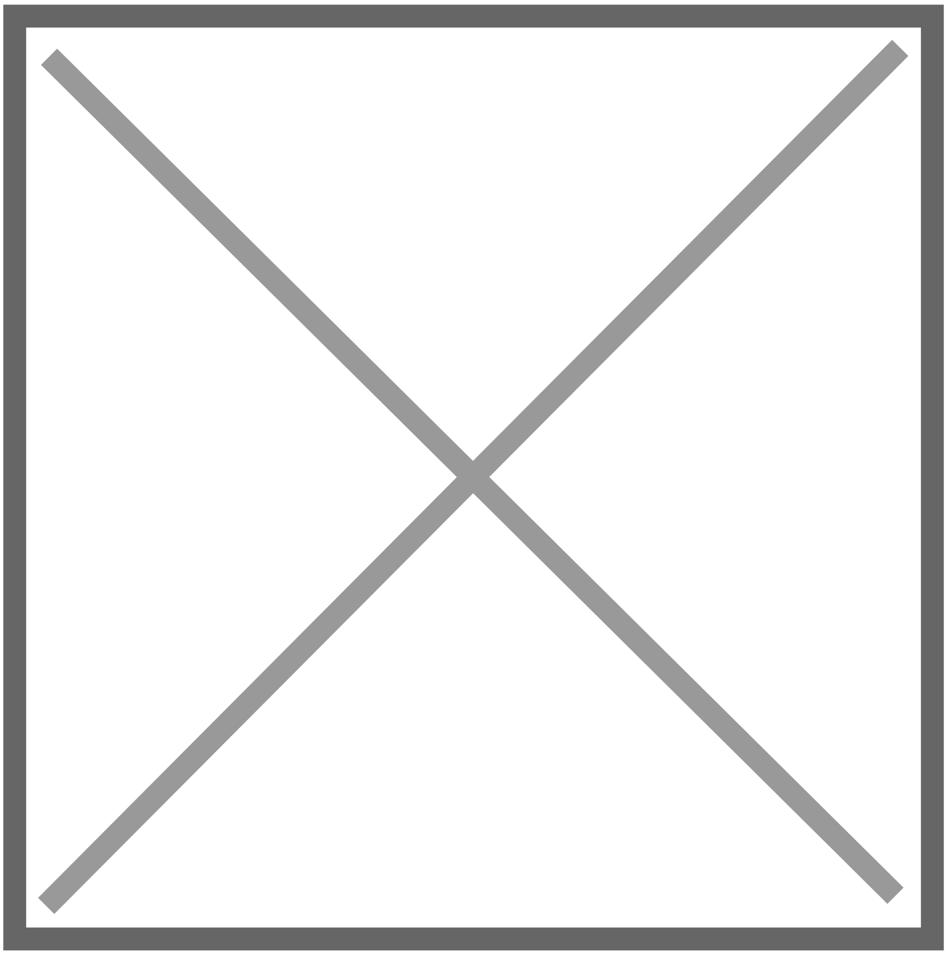


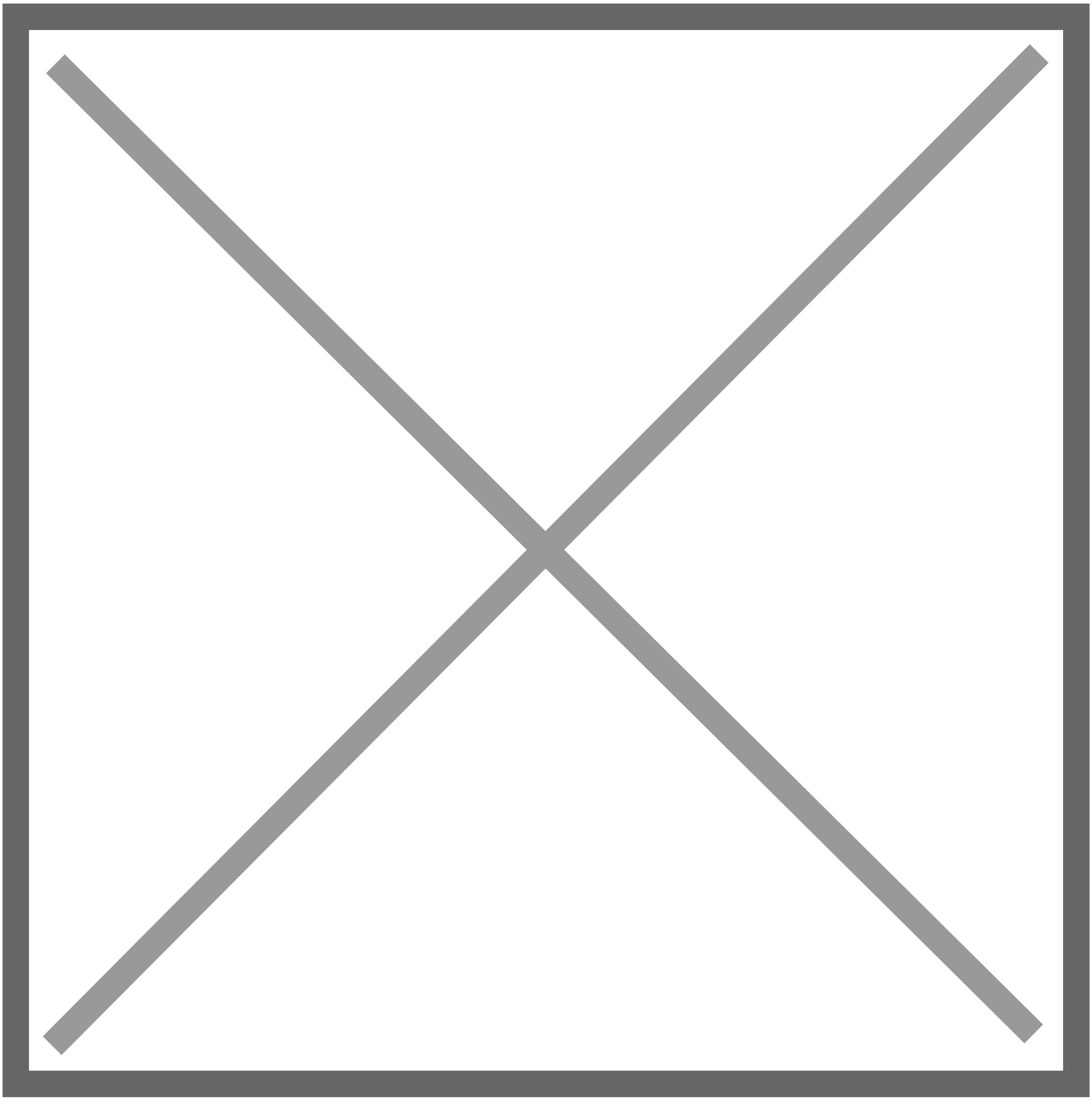
2. Merge —To merge duplicate Leads, select the records from the Leads List View, click the Merge link in the Actions drop-down list, and progress through the merge process.



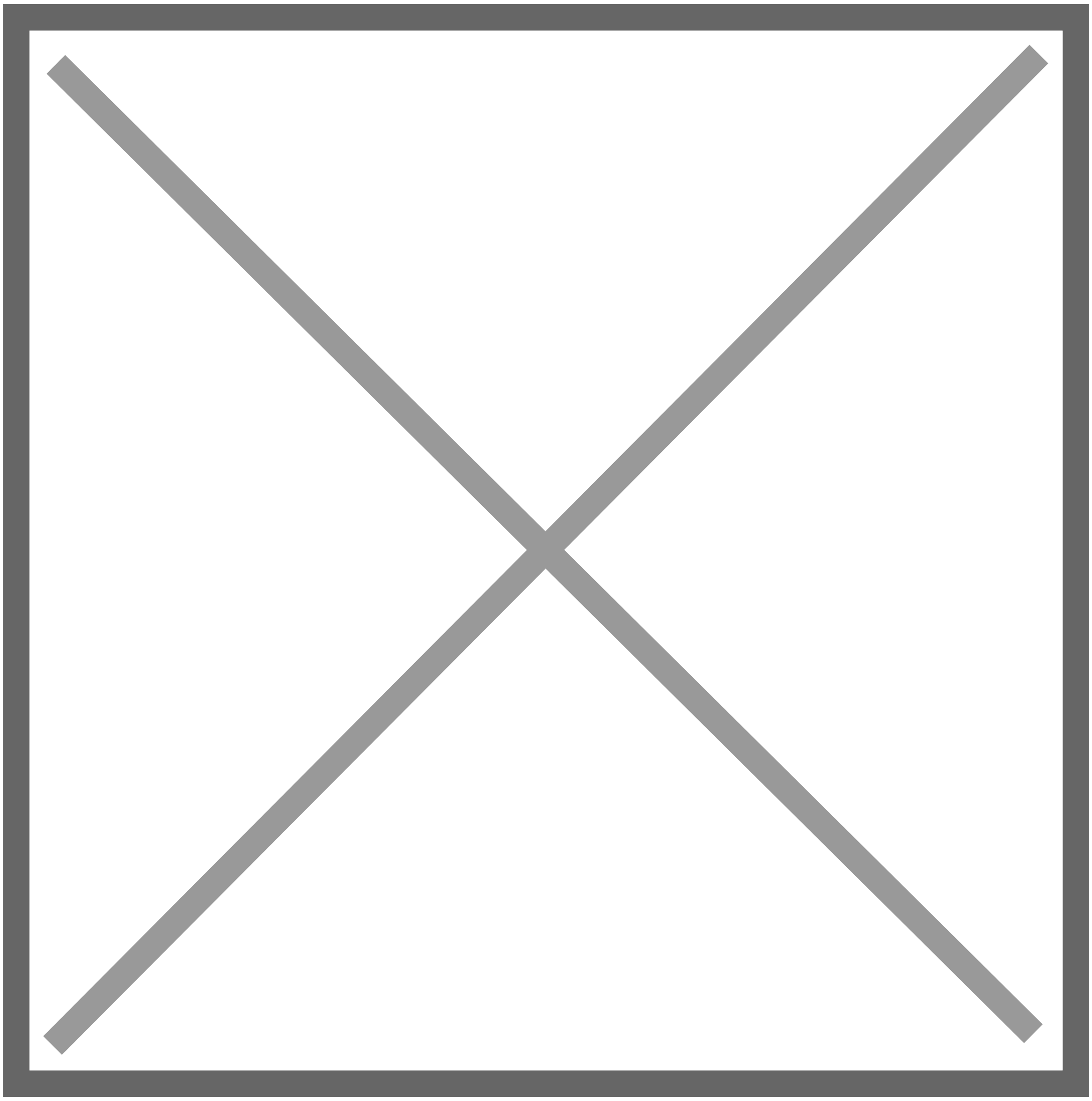


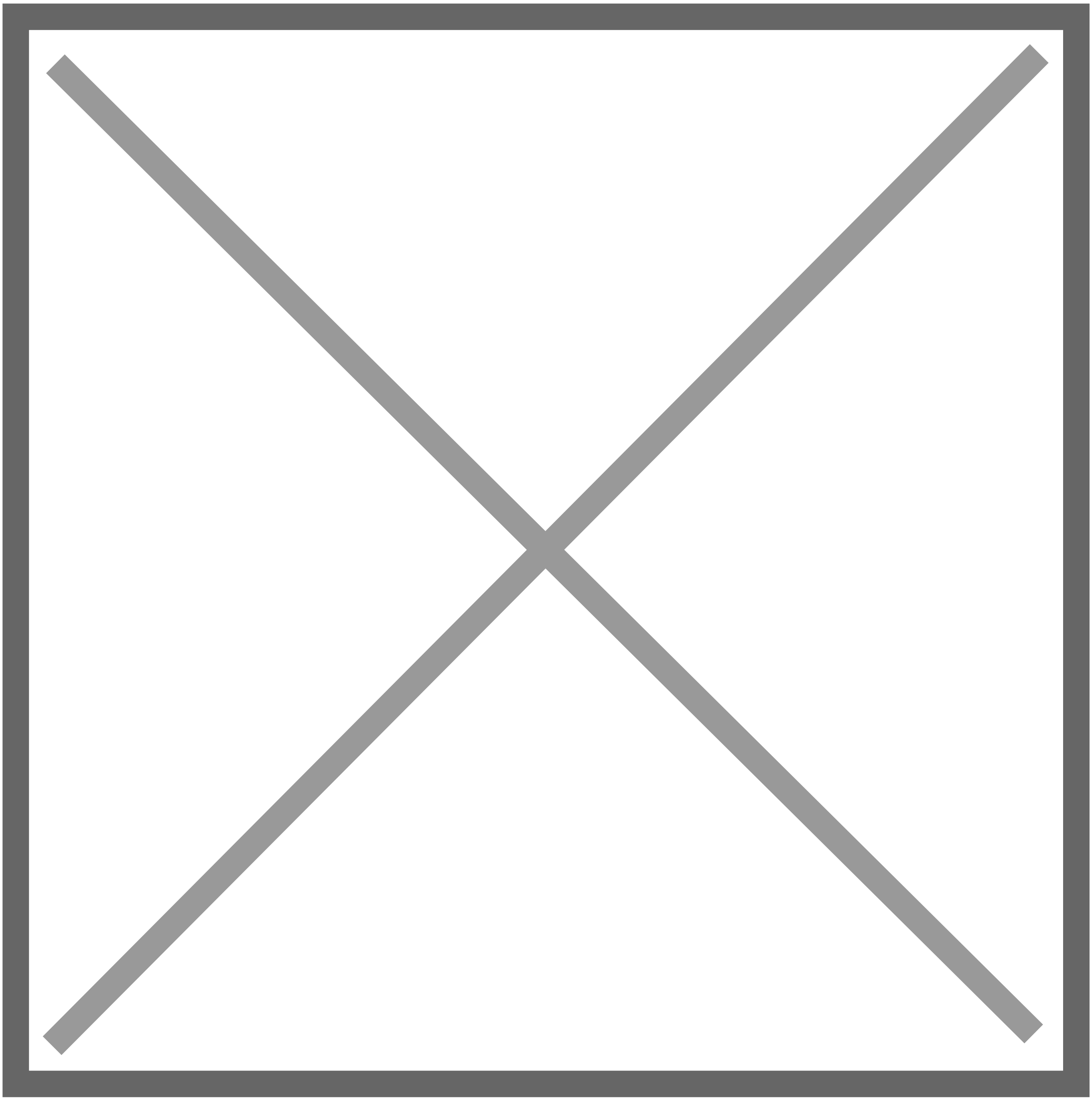
3. Email – Send a direct email to the selected leads using the system's email template or custom message.





4. Add To Target List – Add the selected leads to a predefined marketing or outreach list for future campaigns.





4. Print as PDF – Generate and download a PDF document containing details of the selected leads.

5. Export – Export the selected lead records into a file format (usually CSV or Excel) for offline use or reporting.

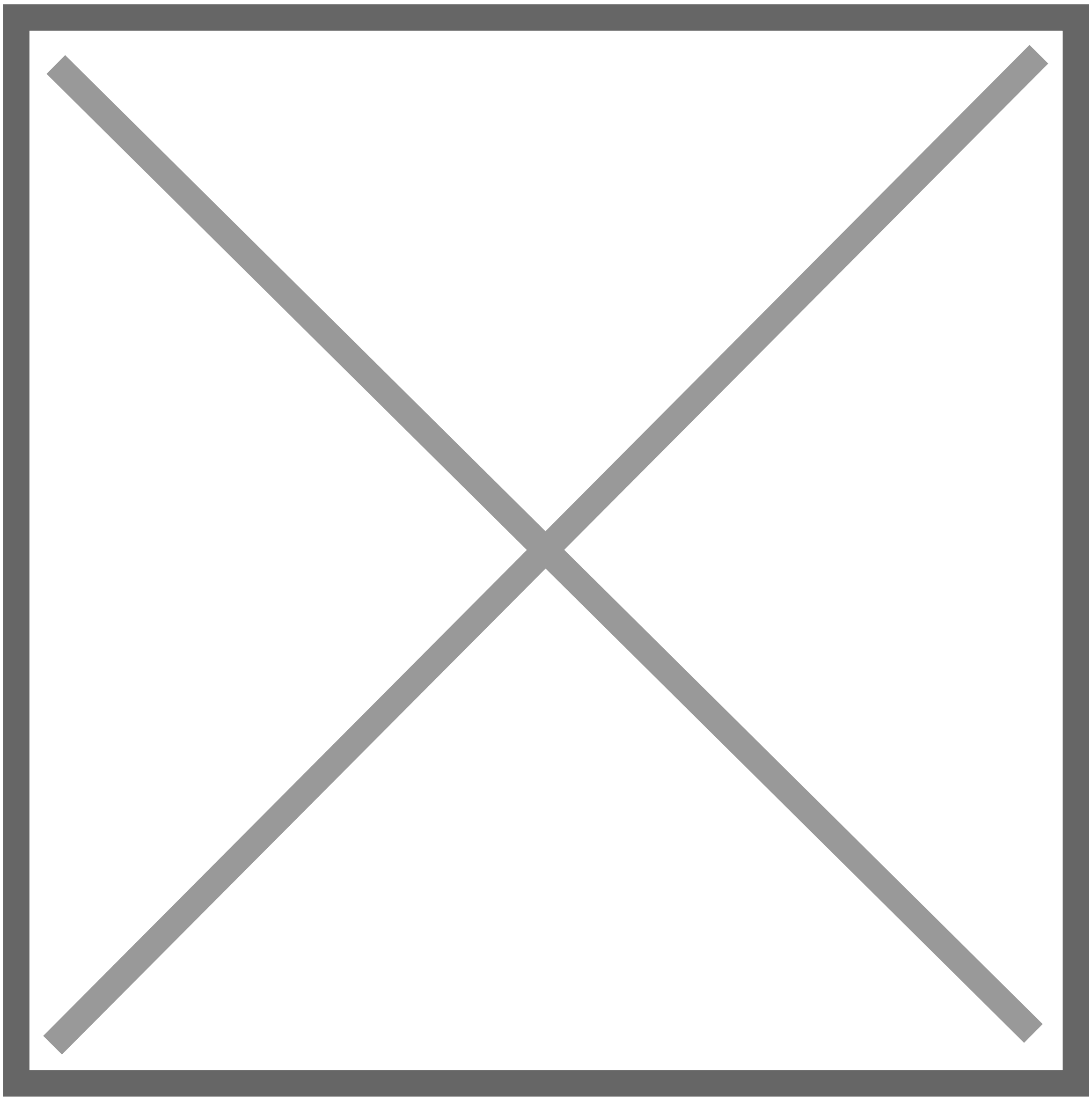
6. Print as PDF – Generate and download a PDF document containing details of the selected leads.

7. Export – Export the selected lead records into a file format (usually CSV or Excel) for offline use or reporting.

8. Map – View the geographic location of the selected leads on a map, if address data is available.

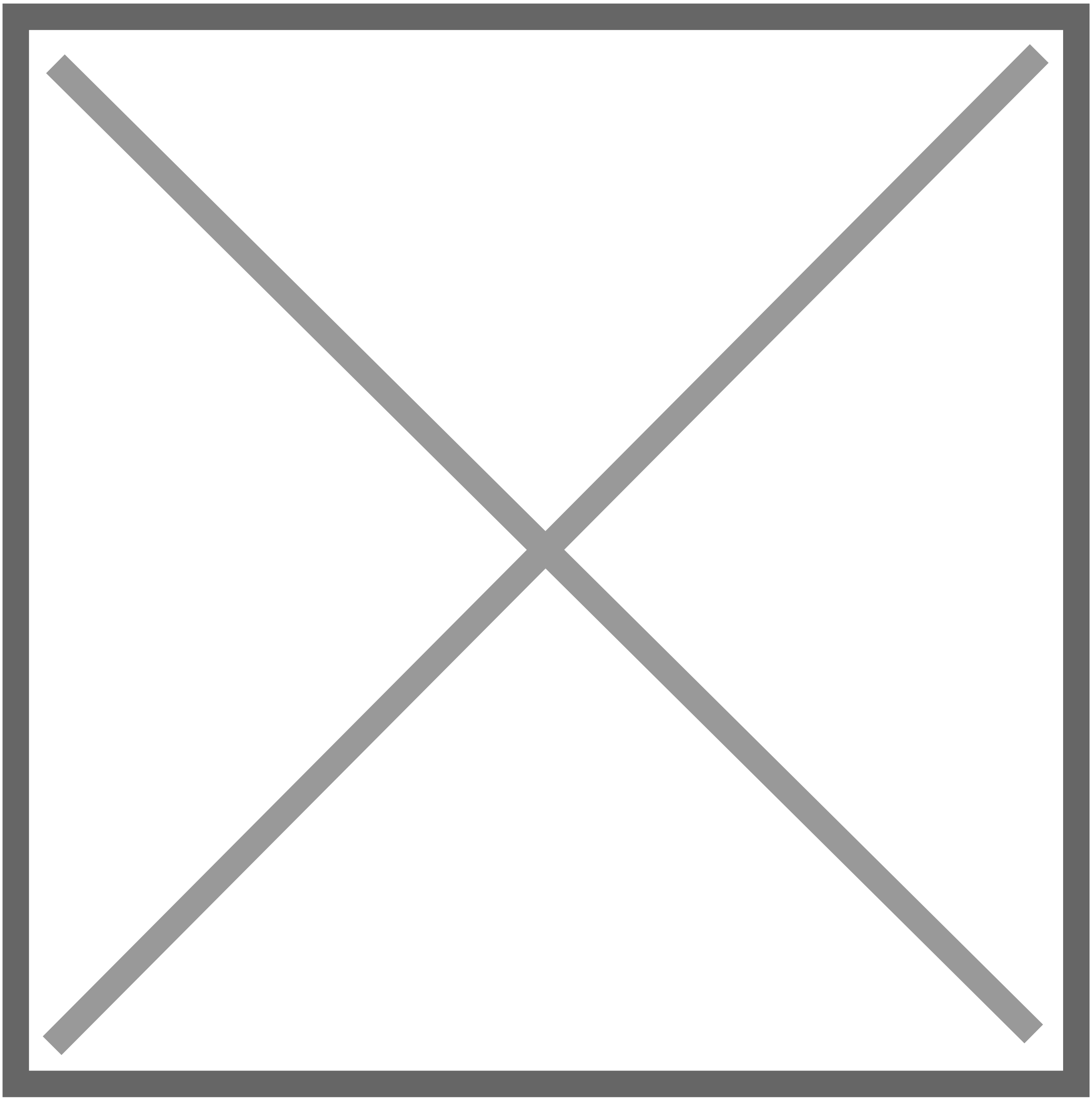
9. Send Bulk SMS – Send text messages to all selected leads simultaneously using an integrated SMS service.

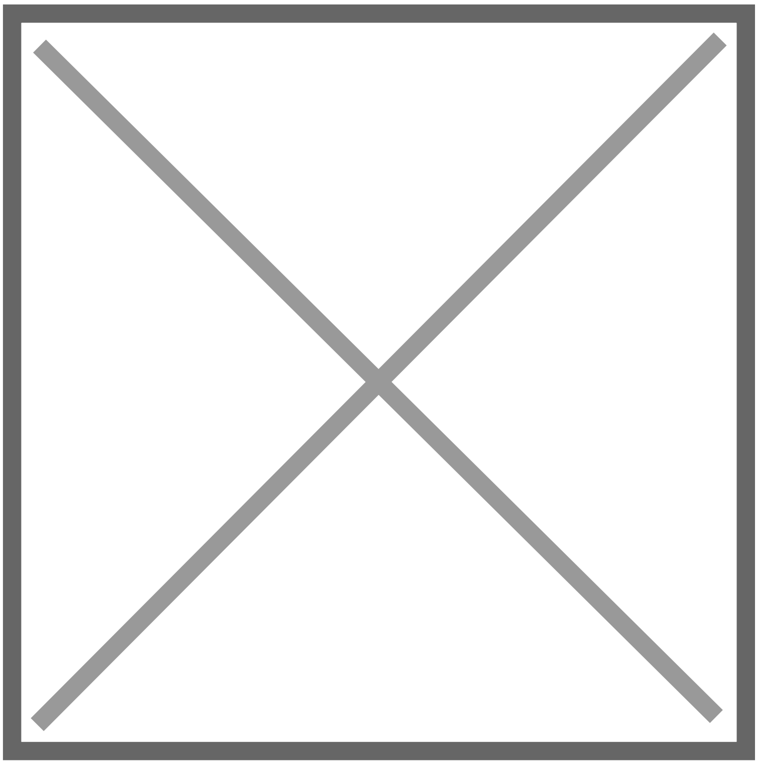
10. Delete – Permanently remove the selected lead records from the system.



Column Chooser

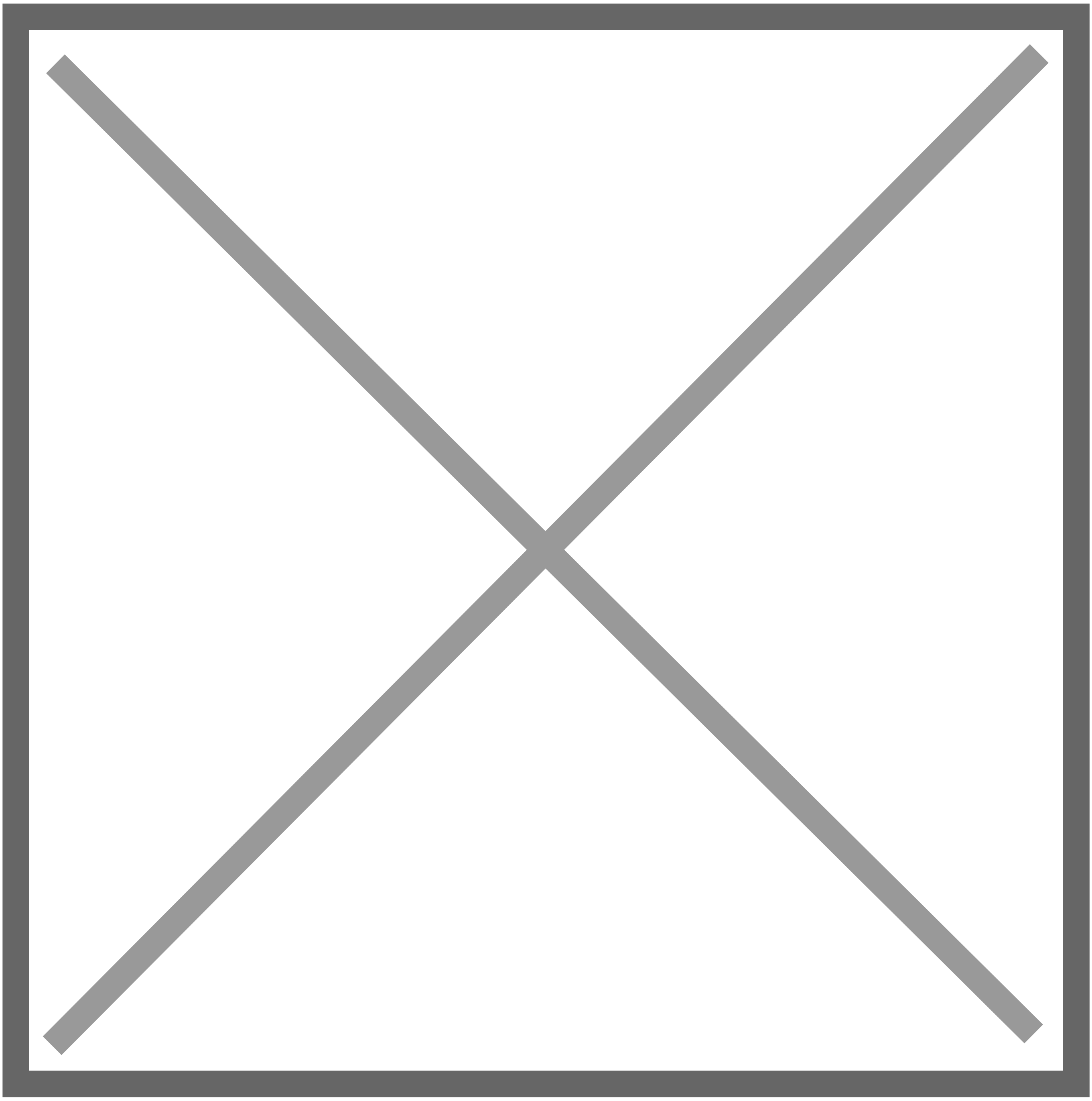
The Column Chooser allows you to customize which columns are displayed in the list view by showing or hiding specific fields.





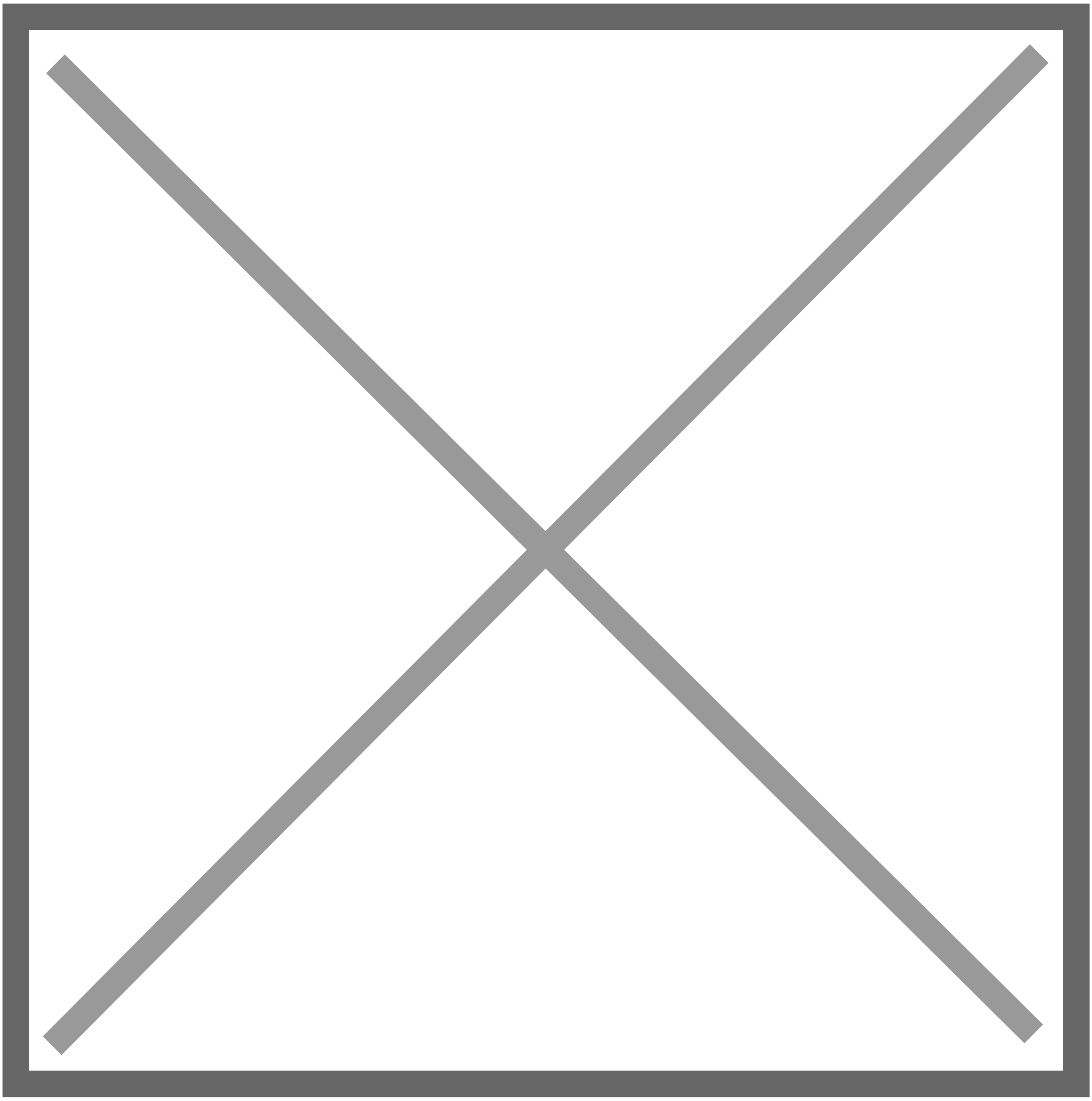
Leads Detail View Actions

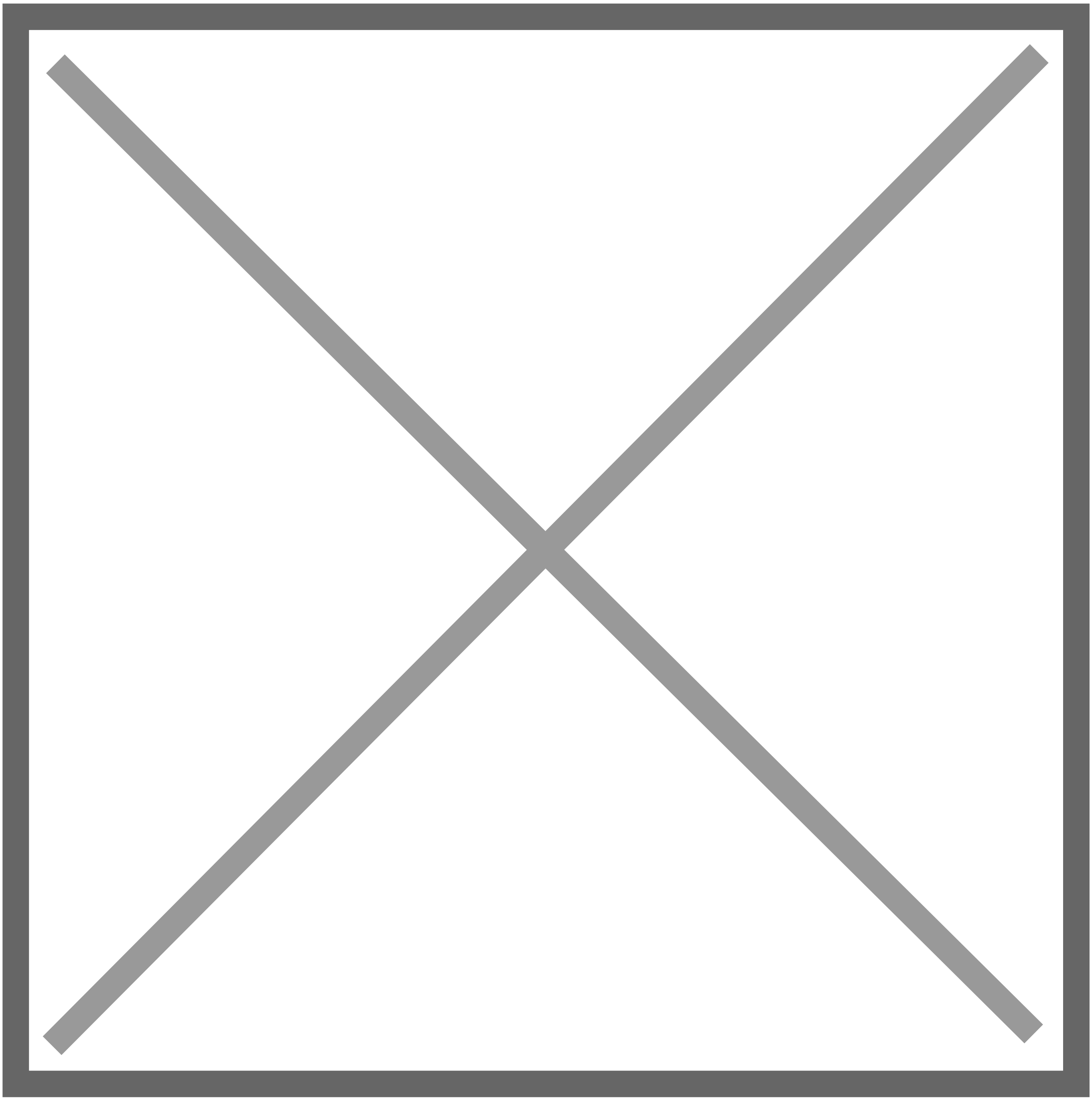
To view a lead’s details, click the lead name in the list view. This will open the record in the detail view.



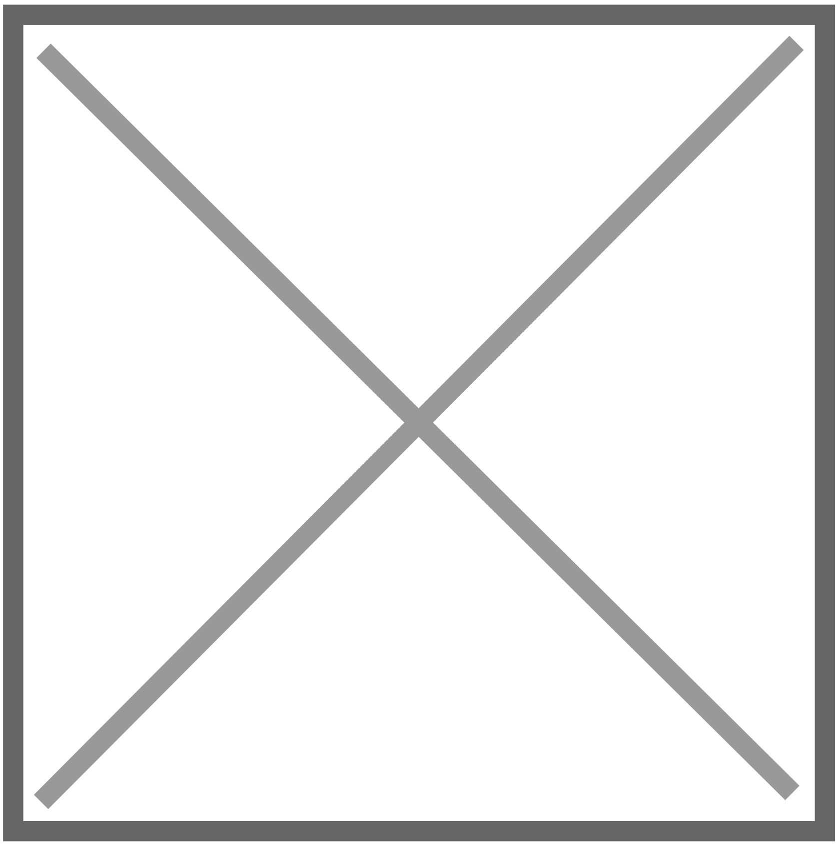
- **Edit** – Open the lead record in edit mode to update its details.
- **Duplicate** – Create a new lead record by copying the details of the current one.
- **Delete** – Permanently remove the current lead record from the system.
- **Find Duplicates** – Search for and display any duplicate lead records in the system.
- **Convert Lead** – Convert the lead into an opportunity, contact, or company and also create notes, schedule meetings, calls, create tasks based on our requirement.

We can Select an existing company or contact or else will create a new one.





After the Lead Conversion records list would be created.



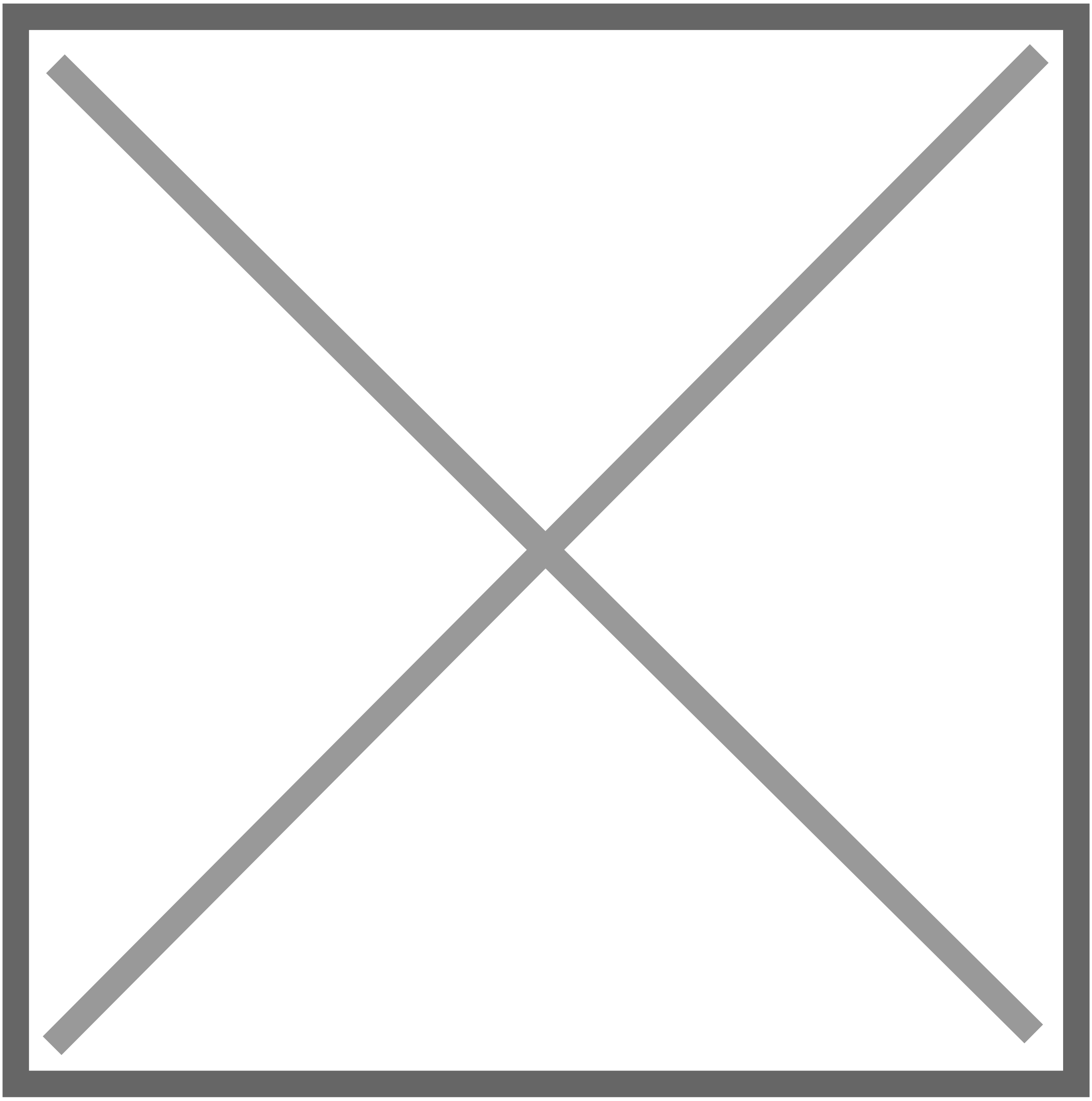
- **Manage Subscriptions** – View or update the lead’s subscription preferences (e.g., for emails or newsletters).
- **Send SMS** – Send a text message directly to the lead's mobile number.
- **Print As PDF** – Generate a printable PDF version of the lead's detail view.
- **View Change Log** – View a history of changes made to the lead’s record, including who made them and when.

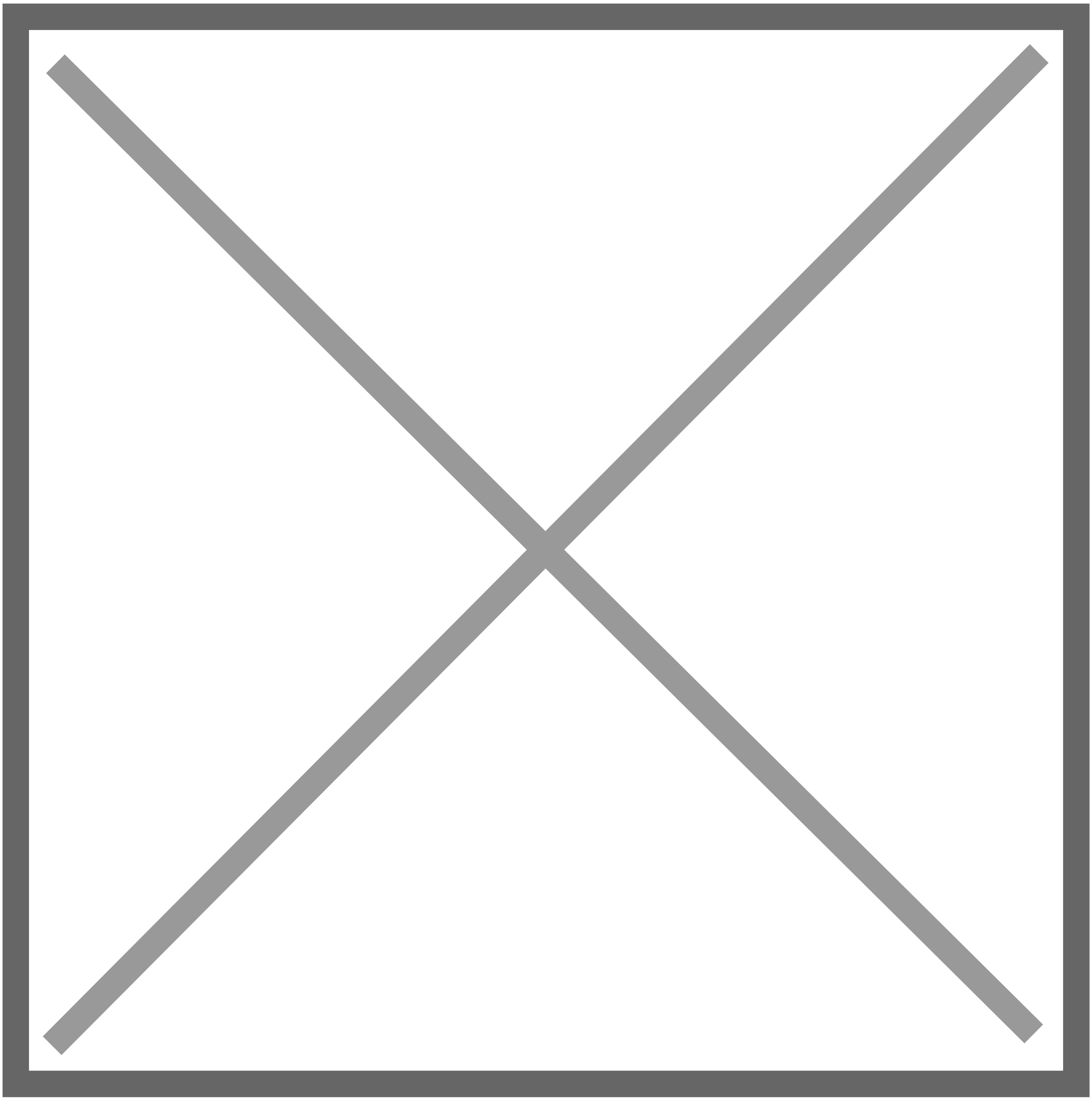
Lead's Activities Management

Lead Activity Management allows users to track and manage interactions with a lead by creating tasks, scheduling meetings, logging calls, or composing emails. Navigate to a detailed view of a record to view Activities.

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

- **Create Task** – Assign a task related to the lead to ensure follow-up actions are completed on time.
- **Schedule Meeting** – Set up a meeting with the lead to discuss business opportunities or next steps.
- **Log Call**– Record details of a phone conversation with the lead for future reference.
- **Compose Email** – Draft and send an email to the lead directly from the system.

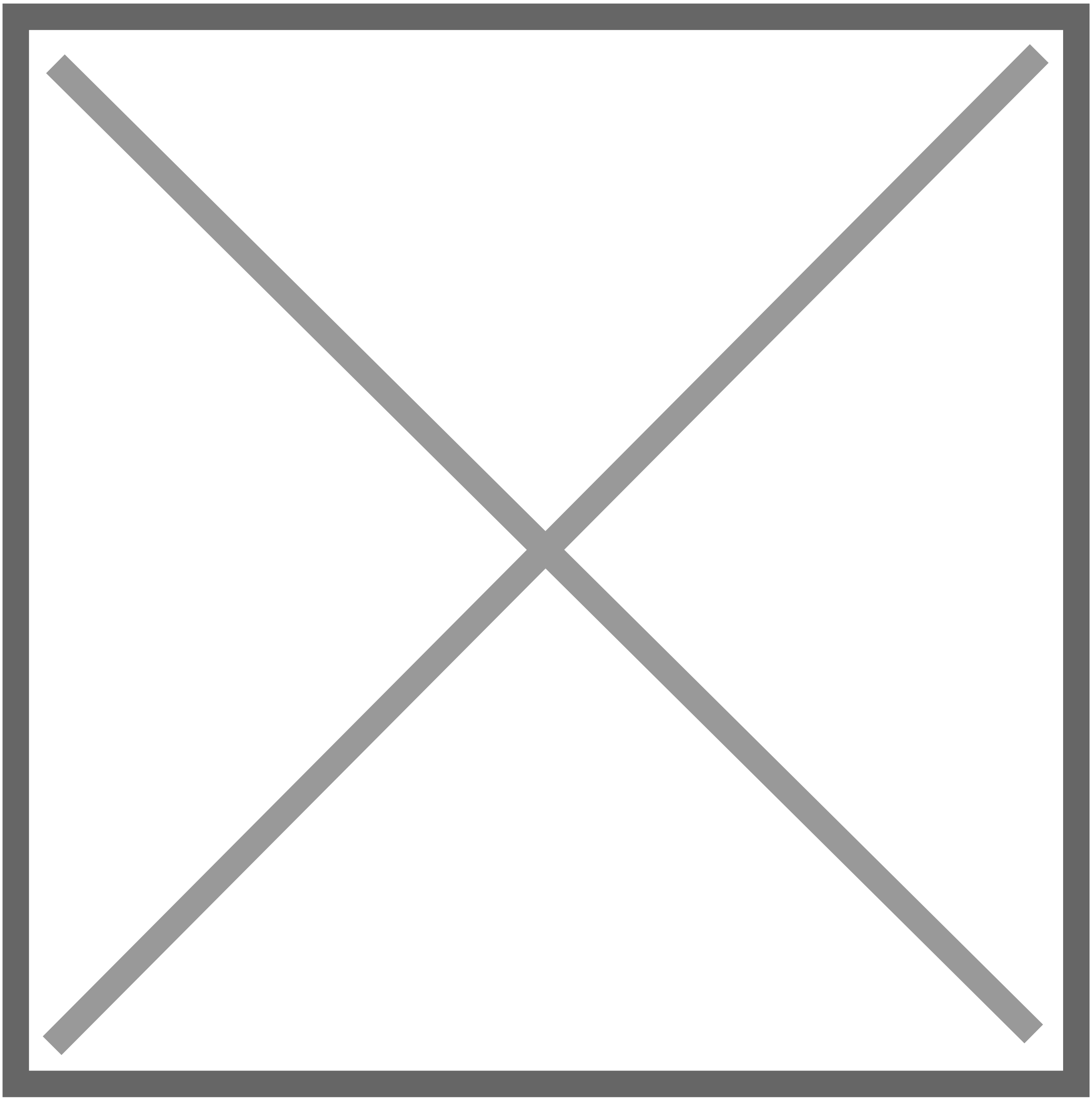


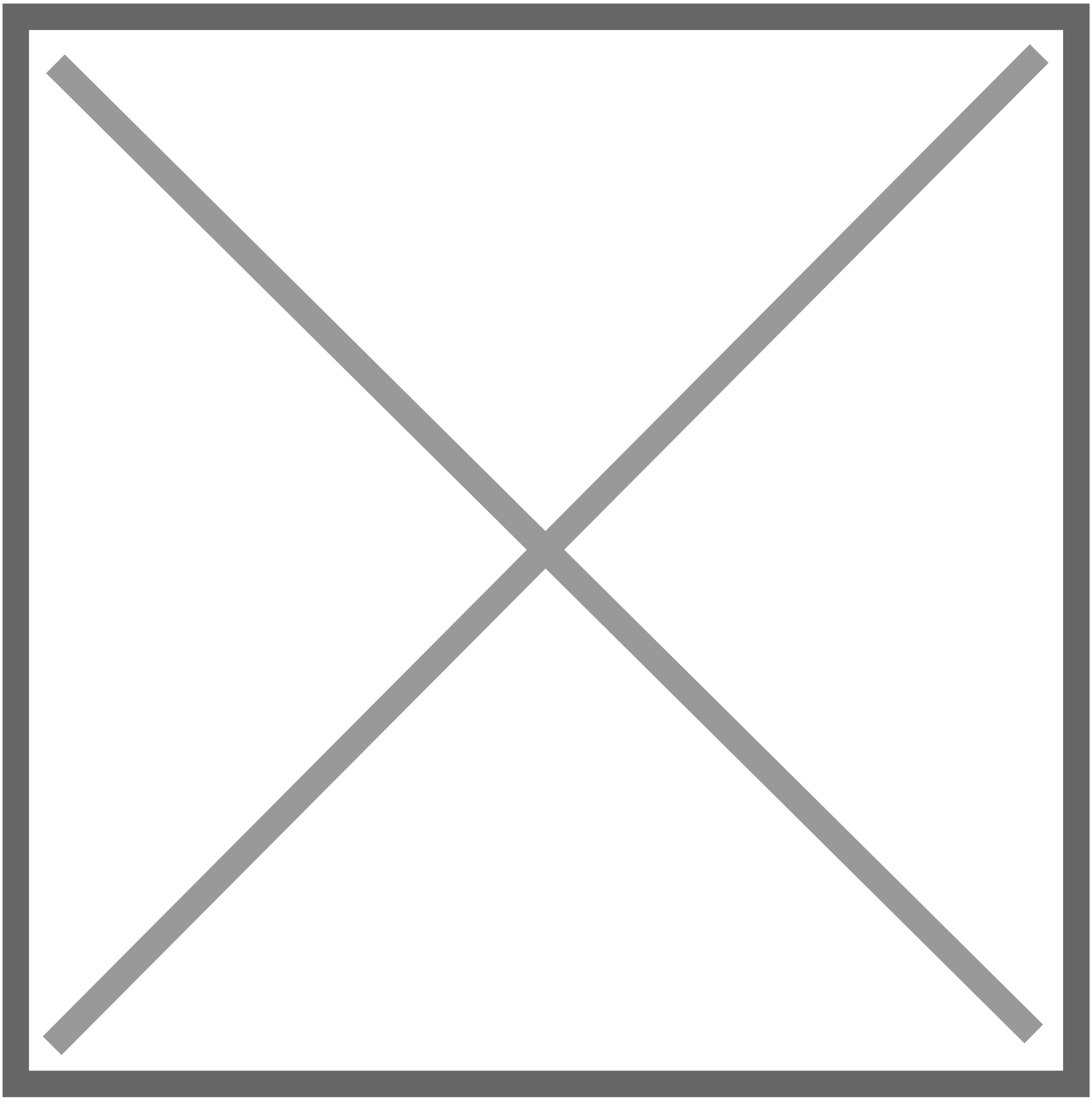


Lead's History Management

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 track here.



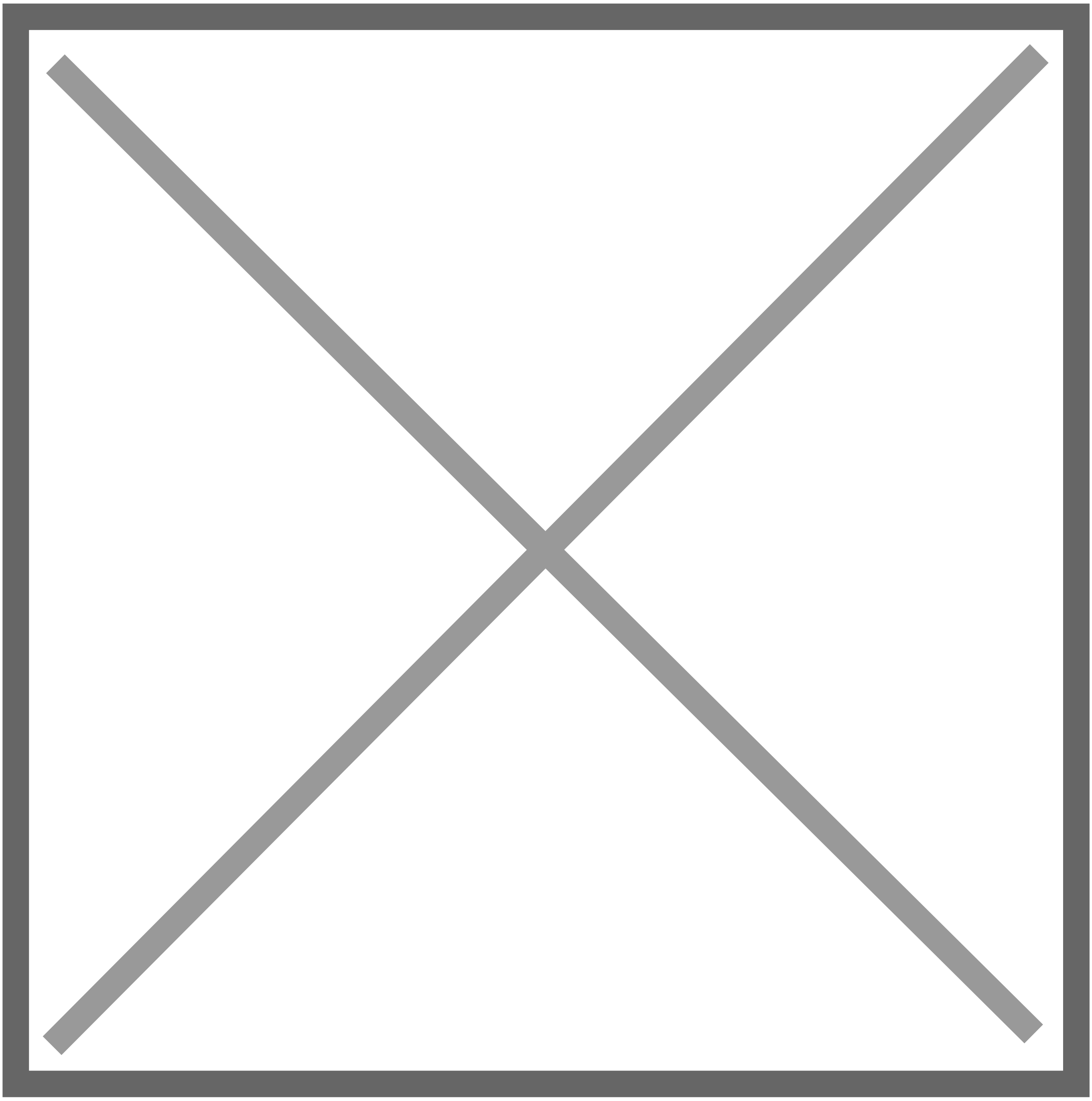


Leads Submodules

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

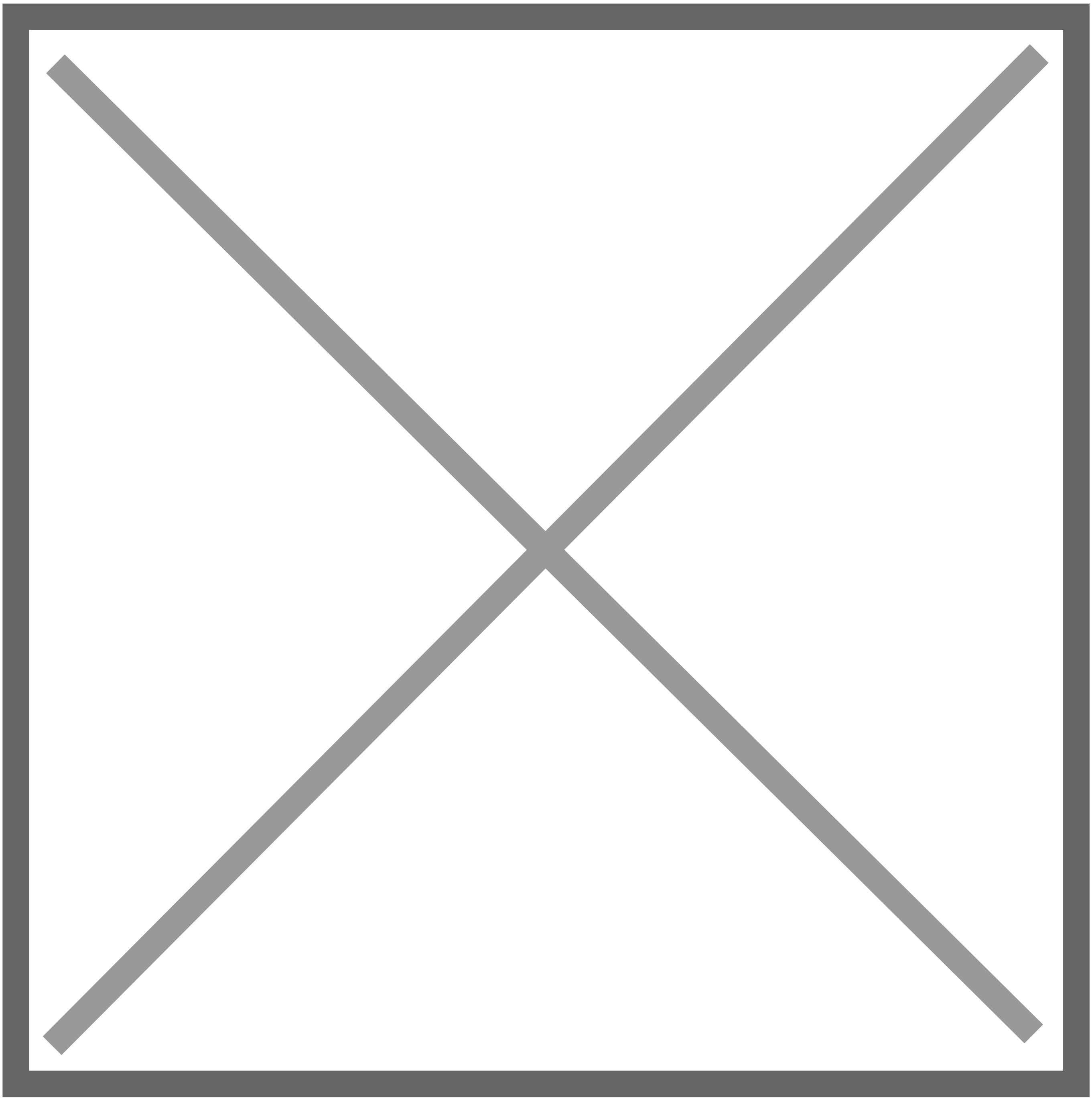
Campaigns

The "Campaigns" tab in the Lead detail view displays any campaign-related activities linked to the lead, including the campaign name, activity type, activity date, and related details.



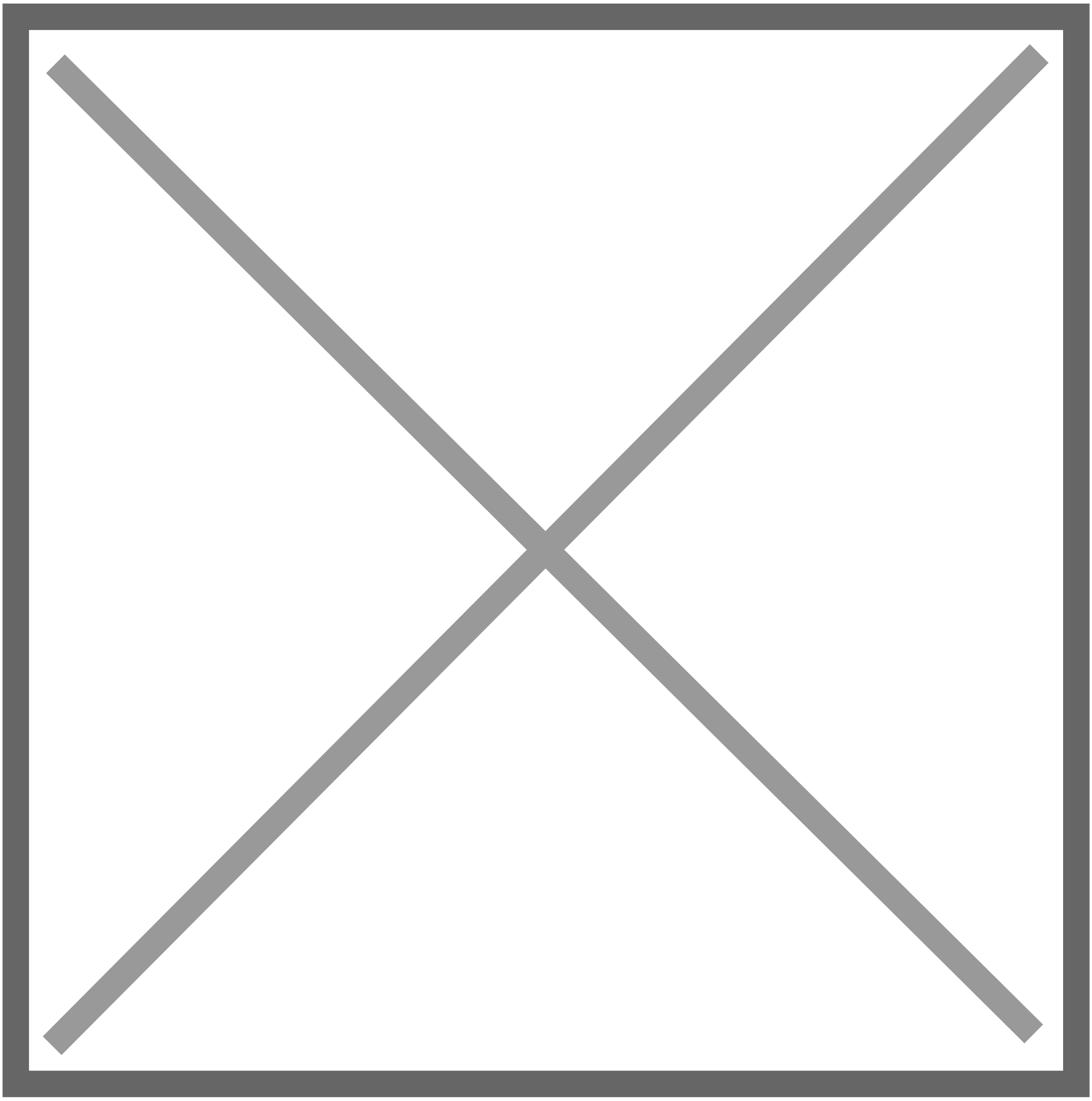
Events

The "Events" tab in the Lead detail view shows any events associated with the lead, with options to create or select events.



SMS

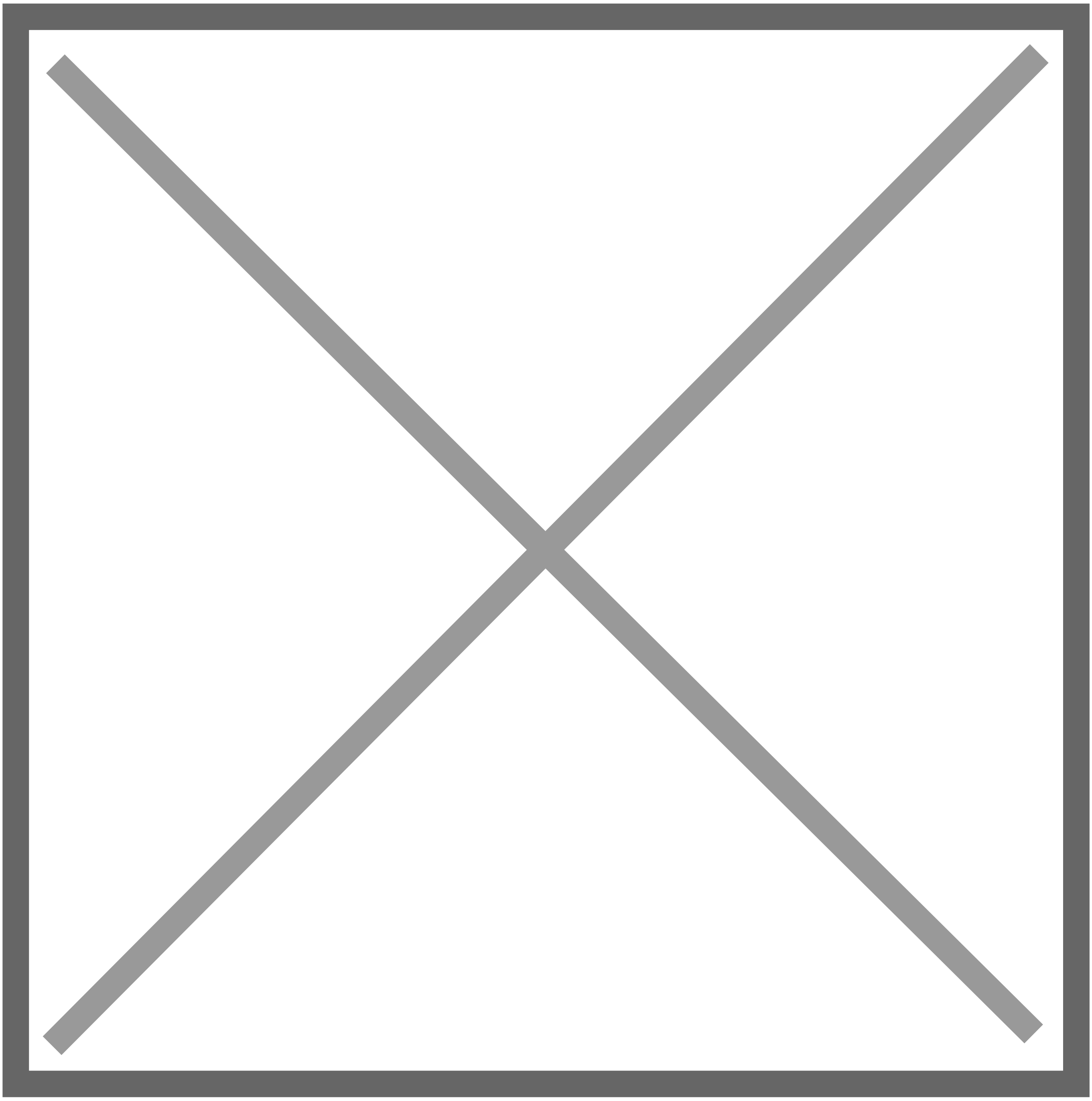
The "SMS" tab in the Lead detail view displays details of text messages sent to the lead, including sender, recipient, phone number, message content, template, message ID, status, and send date.



Security Groups

The "Security Groups" tab in the Lead detail view lists the security groups associated with the lead, showing each group's name and description, along with options to select or remove them.

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.



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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Updated 22 May 2025 07:13:23 by Admin