

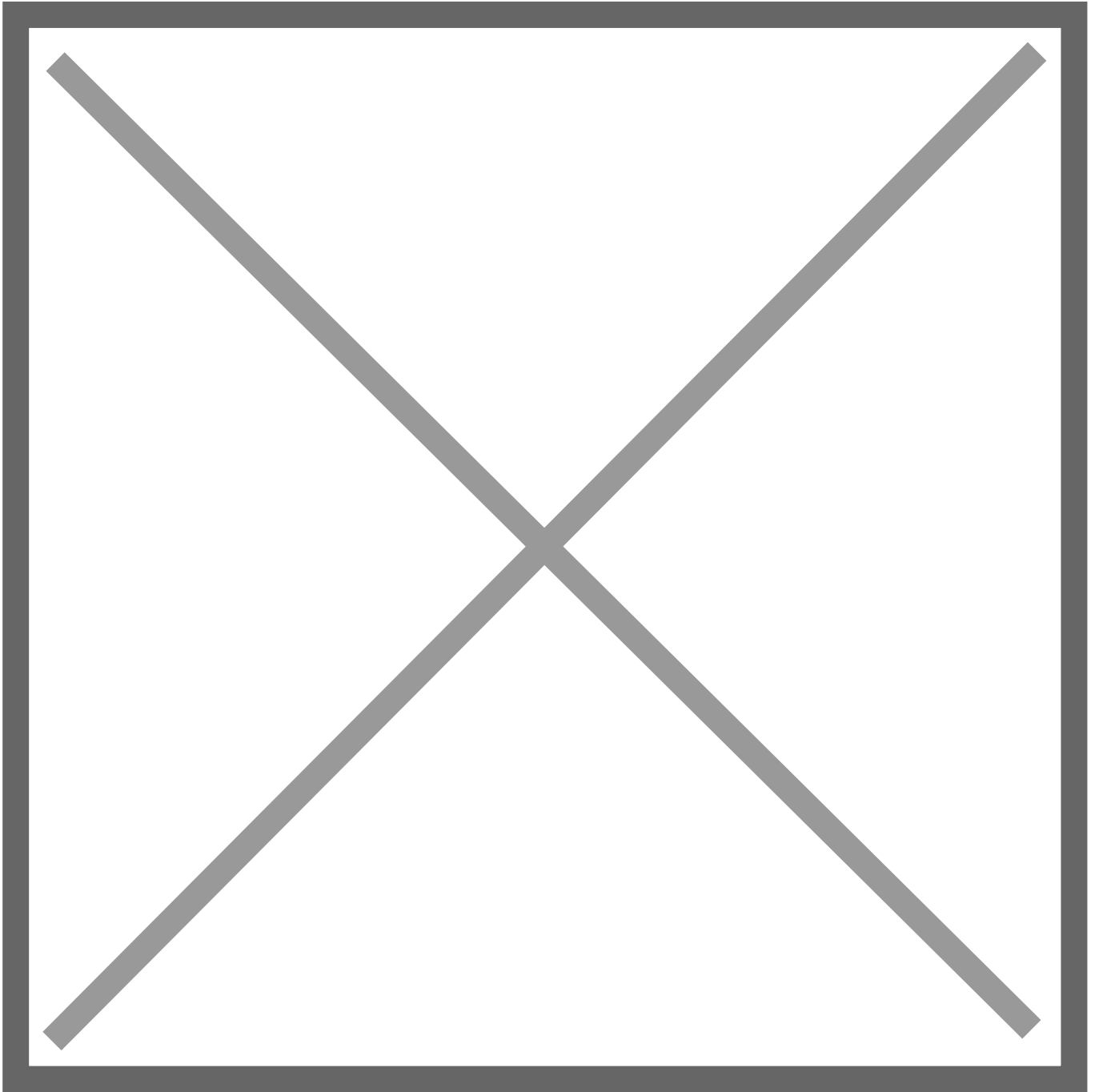
Meetings

The Meetings module in KiyoCRM allows Users to create a record of any Meeting that they have been involved in. The Meeting scheduler allows a User to invite attendees, email invitees, set reminders, reschedule and relate to other modules including a Company, Contact, Project and many other Objects. This module has many more helpful functions that assist the User to plan and organize their Meetings.

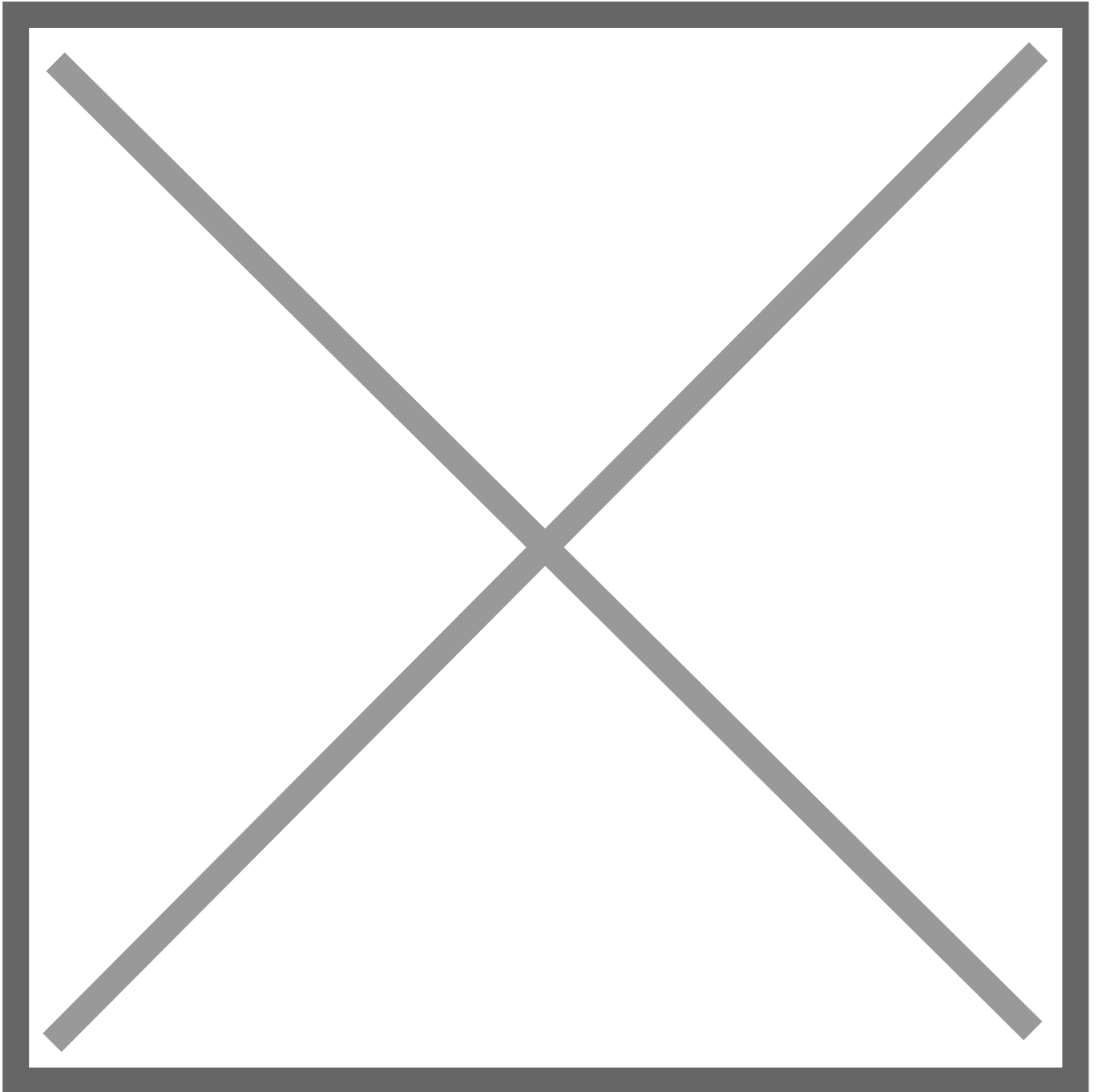
List view Actions

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

- **Schedule Meeting** – A new form is opened in Edit View to allow you to create a new Meeting record. Allows users to schedule meetings by setting the subject, date, time, duration, and related records. Users can add reminders, invite participants, and send notifications via popup or email.

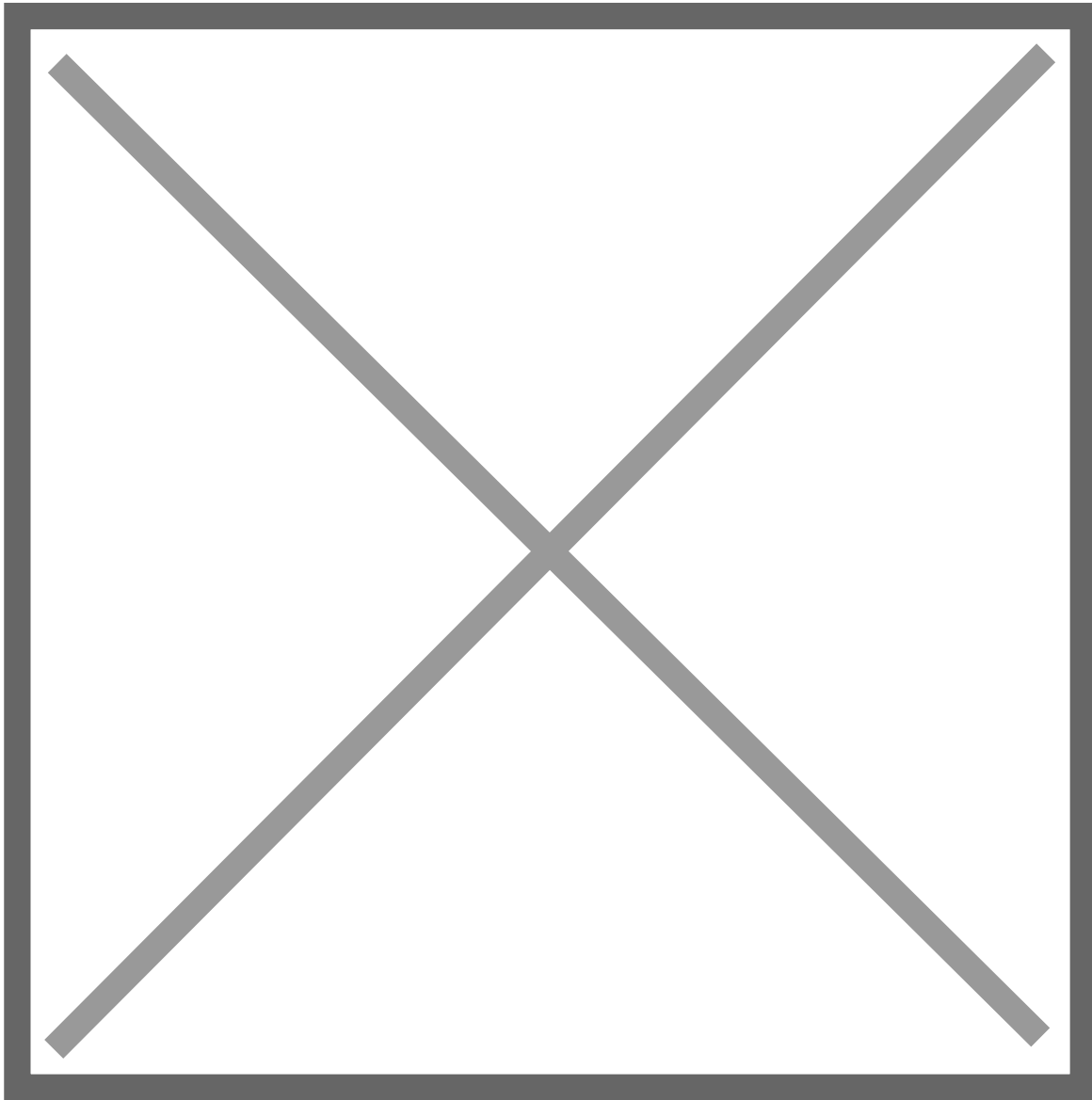


Let's users assign meetings, view availability, add invitees by name or email, and create new contacts or leads directly from the scheduling interface.

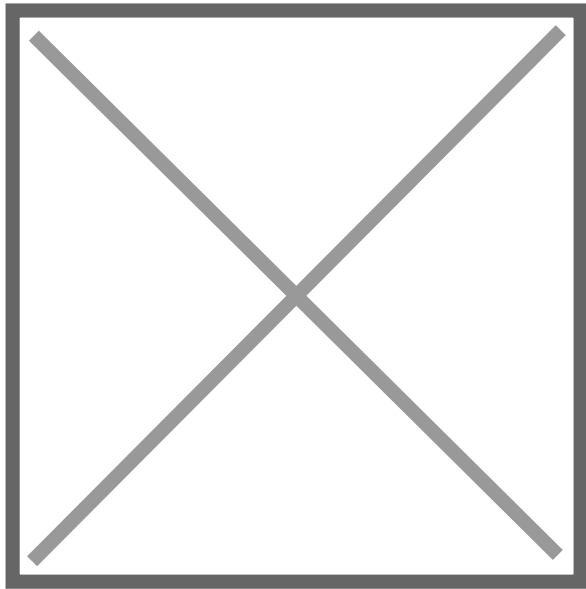


- **View Meetings** – Redirects you to the List View for the Meetings module. This allows you to search and list Meeting records.
- **Import Meetings** – Redirects you to the Import Wizard for the Meetings module. For more information, see the leads module [Import](#).
- **Kanban View**: Visual workflow by Meeting Status (Planned, held, not held)

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



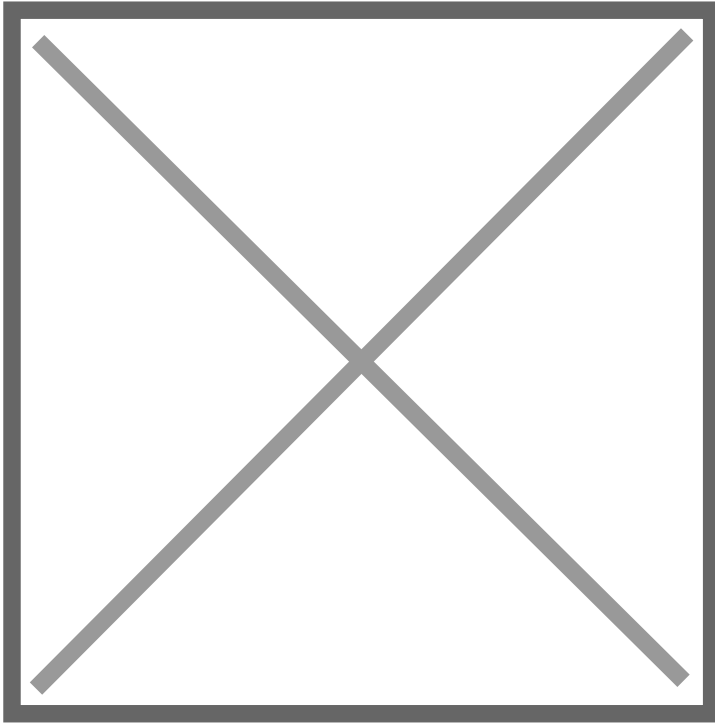
- To sort records on the Meetings List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Meeting, Use Search engine on top
- Clicking on the pencil icon Meetings list view page to the display of record edit view.
- Clicking on the 'i' icon Meetings to the display of Additional Details popup.
- Clicking on the X icon Meetings to the closure of the meeting in the list view page.



Bulk Actions

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

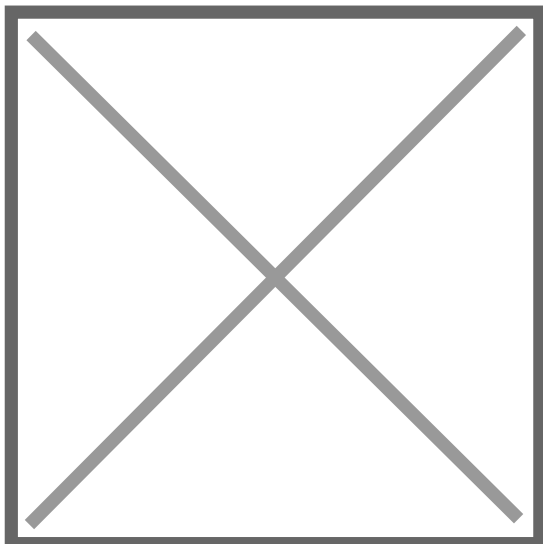
- **Mass Update:** Allows users to update multiple meeting records at once with common changes, saving time and effort.
- **Export:** Enables users to download meeting data in various formats for reporting or backup purposes.
- **Map:** Displays meeting locations on a map for better visualization and route planning.
- **Delete:** Lets users remove selected meeting records in bulk from the system.



Detail View Actions

Click on the Subject to view detail view:

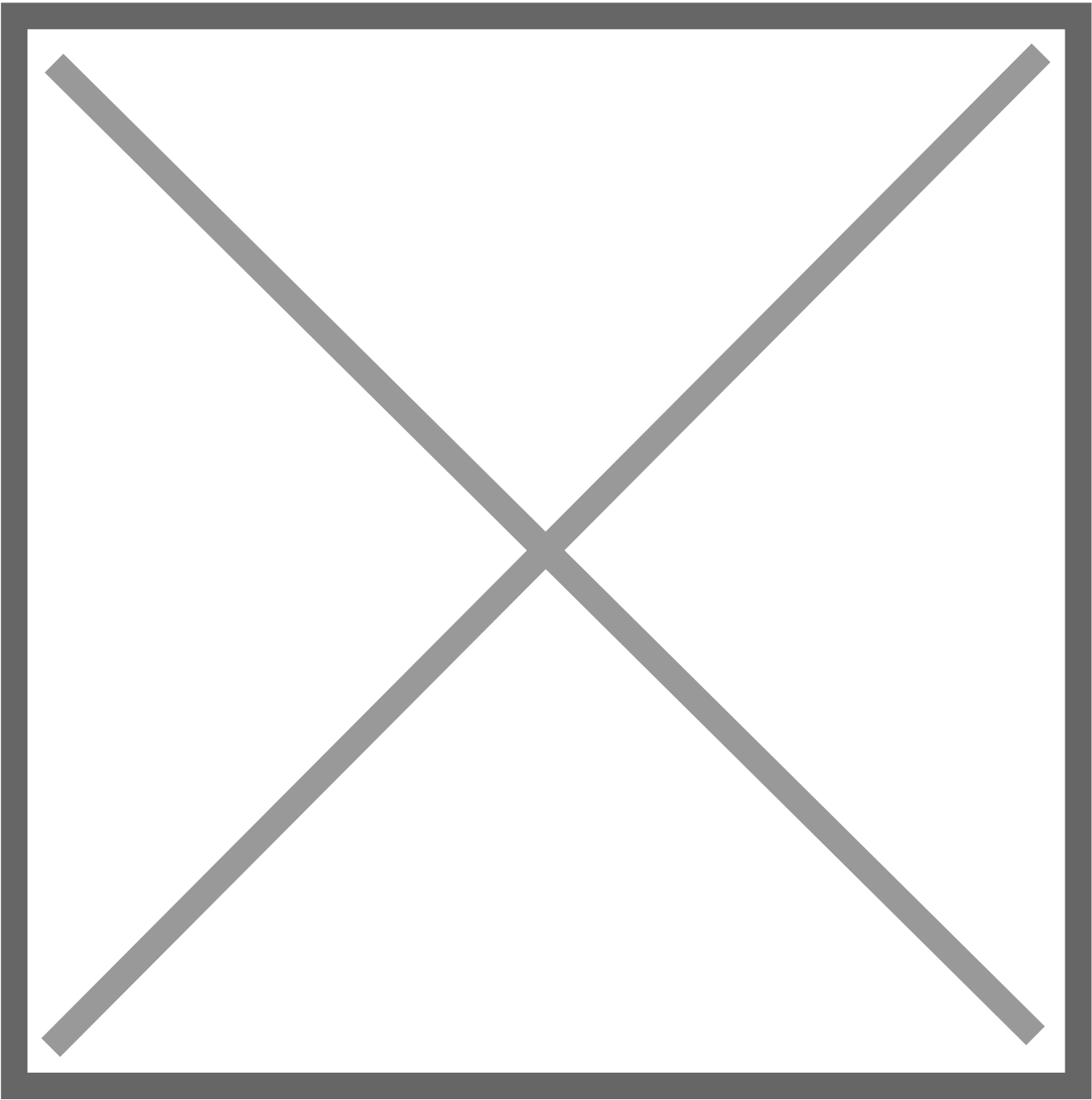
- **Edit, Duplicate, Delete, Find Duplicates** functionalities are similar to other modules.
Refer [Leads module Detail view actions](#).
- **Close and Create New:** Saves the current meeting record and immediately opens a new blank form to schedule another meeting, streamlining back-to-back entries.
- **Close:** Saves the current meeting record and exits the form without opening a new one.



Submodules

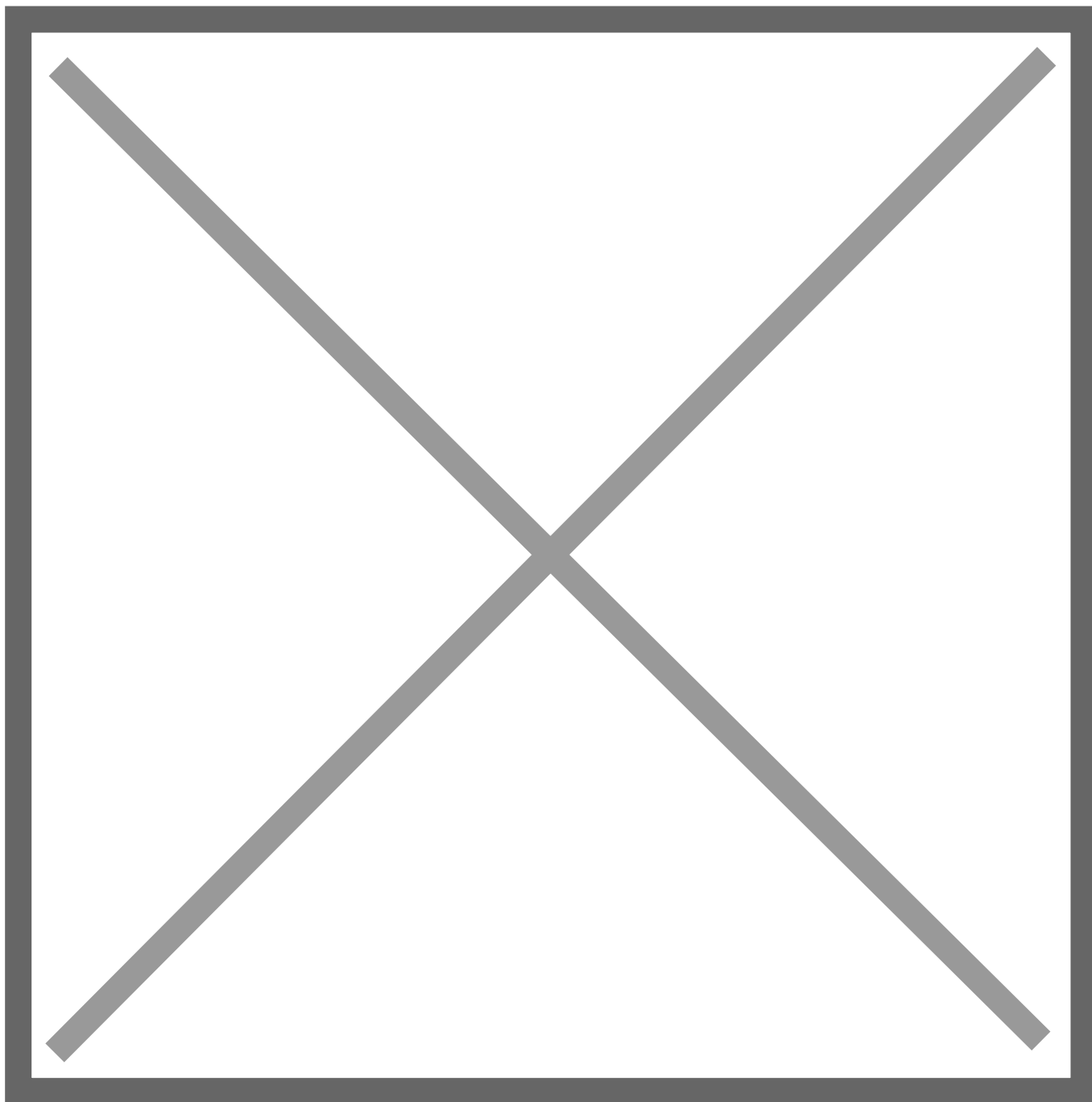
Contacts:

Displays and manages the list of attendees linked to a meeting, allowing users to add, search, or create contact records for scheduling.



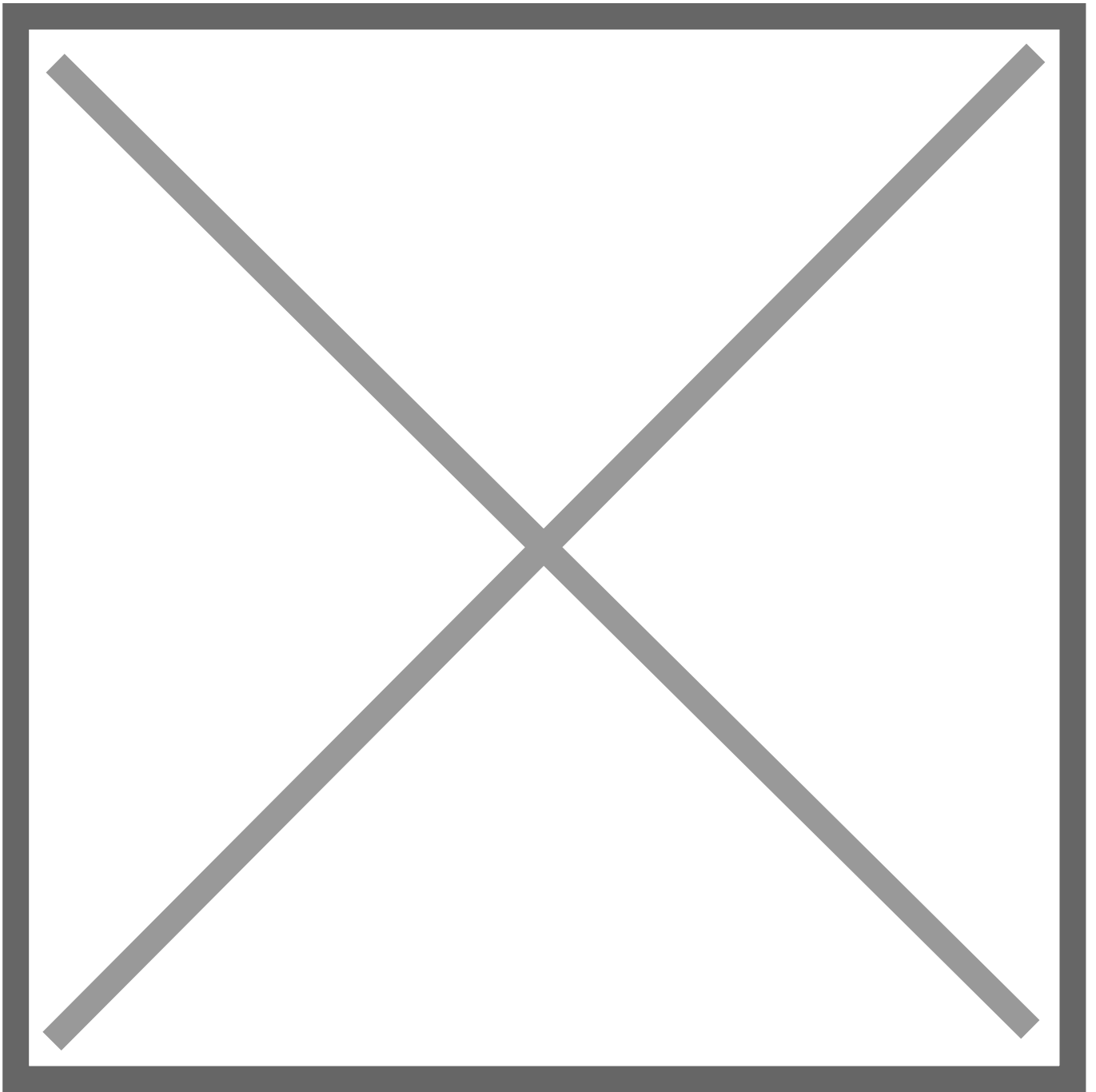
Users

Allows assignment of CRM users to meetings, enabling collaboration, ownership tracking, and calendar visibility for scheduled events.



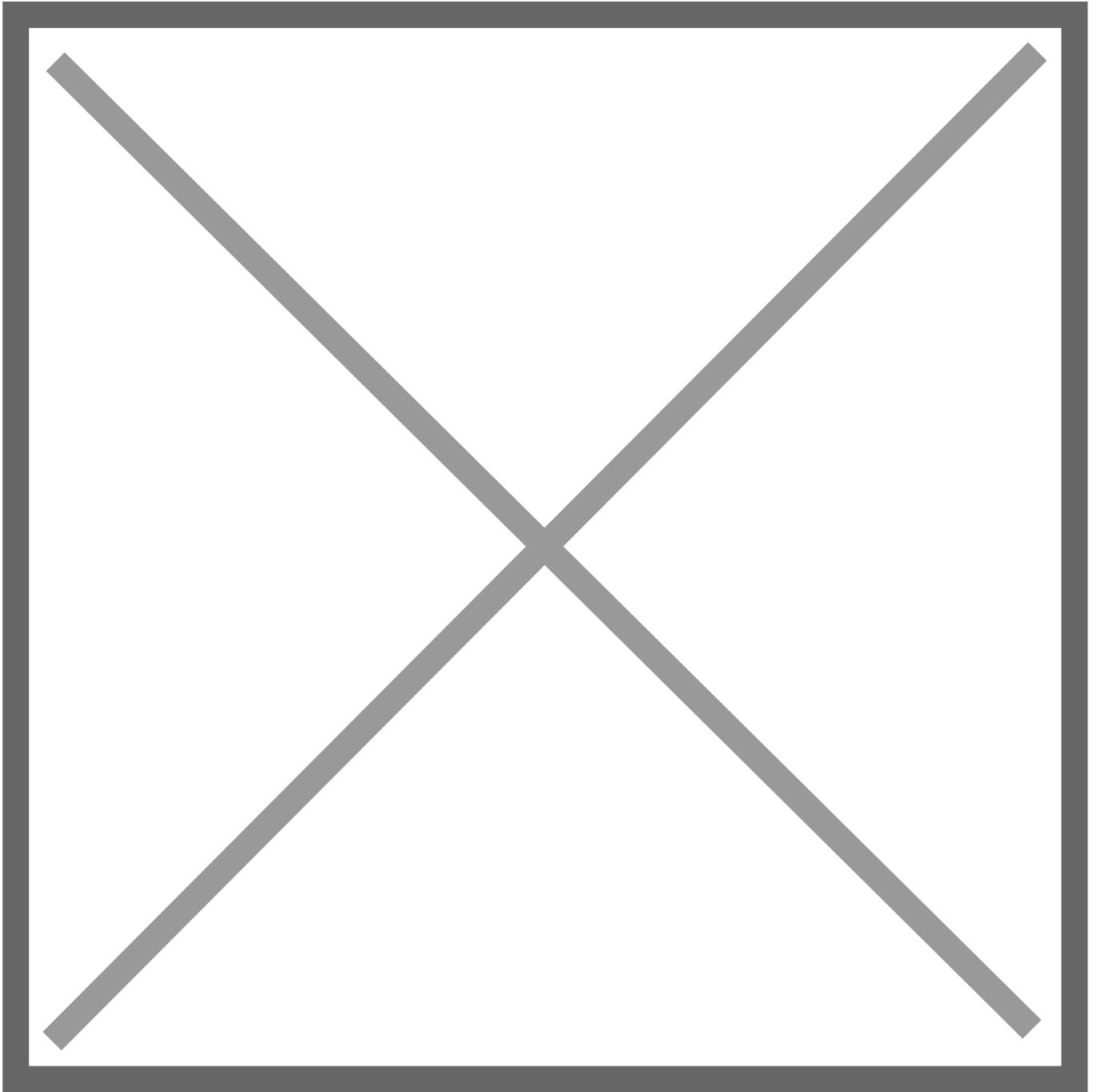
Leads

Enables users to link potential customers (leads) to meetings for follow-ups, demos, or discussions, helping track engagement throughout the sales process.



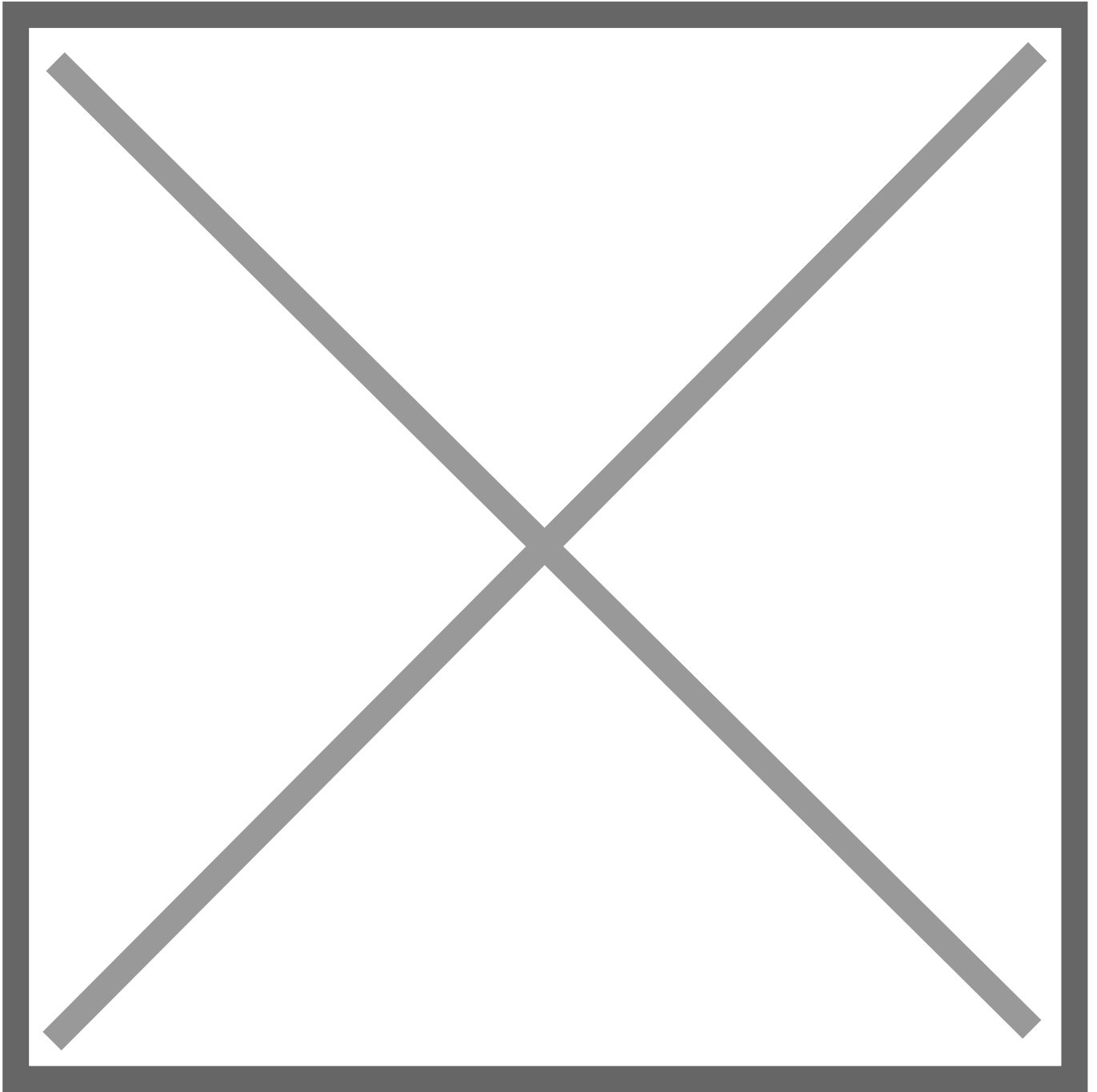
Notes

Allows users to add and view notes related to a meeting, capturing key discussion points, decisions, and follow-up actions for future reference.



Security Groups

Control access to meeting records by assigning them to specific user groups, ensuring only authorized users can view or modify the information.



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 #9

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