

Notes

The Notes module in KiyoCRM can be used to keep a record of any comments, observations or explanations that a User may have relating internally to their organization or relating to another KiyoCRM record such as a Company, Contact, Lead or many more. Notes are also used to keep record of interactions with Customers regarding Cases and Bugs.

List View Actions

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

- **Create Note or Attachment** – A new form is opened in Edit View to allow you to create a new Note record (with attachment).
- **View Notes** – Redirects you to the List View for the Notes module. This allows you to search and list Note records.
- **Import Notes** – Redirects you will be taken to the Import Wizard for the Notes module. Refer Leads module [Import](#).
- **Column Chooser** -- Allows users to show or hide specific columns in a data table for customized viewing. Refer Leads [Column Chooser](#).
- **Filters** -- For [Quick and Advanced filter](#) search, refer leads module.
- 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 Notes, Use Search engine on top
- Clicking on the pencil icon Notes list view page to the display of record edit view.
- Clicking on the 'i' icon Notes to the display of Additional Details popup.
- Clicking on the X icon Notes to the closure of the Notes in the list view page.

[image.png](#)

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 Note records at once with common changes related to, assigned to, contact fields.
- **Export:** Enables users to download notes data in various formats for reporting or backup

purposes.

- **Map:** Displays notes locations on a map for better visualization and route planning.
- **Delete:** Lets users remove selected notes records in bulk from the system.

[image.png](#)

Detail View Actions

Click on the Subject to view detail view:

- **Edit** – Open the note record in edit mode to update its details.
- **Duplicate** – Create a new note record by copying the details of the current one.
- **Delete** – Permanently remove the current note record from the system.

[image.png](#)

Submodules

Security Groups

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

Can select from existing records.

[image.png](#)

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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