Projects

In KiyoCRM the Projects module allows the User to arrange their organization’s projects by tracking a number of Tasks and allocating resources. Once set up, a project can be visualized in the form of a Gantt chart or using the project grid.

image.png

List View Actions

You can access the Projects actions from the Projects module menu drop down or via the Sidebar once you have clicked to view the module. The Projects actions are as follows:

- **Create Project** – A new form is opened in Edit View to allow you to create a new Project record.
- **View Project** – Redirects you to the List View for the Projects module. This allows you to search and list Project records.
- **View Project Tasks** – Allows you to list Project Tasks, which are related to a parent Project.
- **Import Project** – Redirects you to the Import Wizard for the Projects module.
- **Resource Calendar** -- Plan and manage resource availability by scheduling team members, tracking workloads, and aligning tasks with project timelines.

image.png

- **Kanban View** – Visual workflow by Priority (High, Medium, Low)

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

image.png

- Use **Filter** for Search of records - **Quick filter and Advanced filters**

Note: Refer Quick filter of Leads

- **Recently viewed** records displayed in the side nav bar.
- Saved filters list showing inside nav bar as **My Filters**
- Favorite records of projects would be displayed in the side nav bar. (From a detailed view of records, selecting the star beside the title undergoes a record into the favorites list.)

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

Note: Refer Leads module Column Chooser.

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

Creating Projects

In the Projects module, you can create, manage, and duplicate Projects and Project Tasks.

You can define multiple Project Tasks for each Project. When you create a Project Task, you must associate it with a Project. You can associate a Project with multiple activities, Companies, Opportunities, and Cases. You can also create Projects and Project Tasks from an Email's detail page.

1. In the Actions bar, click **Create Project**.
2. On the Projects page, enter information for the following fields:
    1. **Name.** Enter a name for the Project.
    2. **Status.** From the drop-down list, select the Project status such as Draft, In Review, or Published.
    3. **Start Date.** Click the Calendar icon and select the Project start date.
    4. **End Date.** Click the Calendar icon and select the Project end date.
    5. **Assigned to.** Enter the name of you who has ownership of the Project. By default, it is assigned to you.
    6. **Priority.** From the drop-down list, select the importance of the Project such as Low, Medium, or High.
    7. **Description.** Enter a brief description of the Project.
3. Click **Save** to create the Project; click Cancel to exit the page without creating the Project.

When you save the Project, the Project's detail page displays on the page.

From this page, you can relate the Project to records such as Contacts and Opportunities.

image.png

Creating Project Tasks

1. In the Project Tasks sub-panel, click Create.

2. On the Project Tasks page, enter information for the following fields:
    1. **Name**. Enter a name for the task.
    2. **Task ID**. Enter a numerical value as the task identification number.
    3. **Start Date**. Click the Calendar icon and select the date when the task is due to begin.
    4. **Finish Date**. Click the Calendar icon and select a date when the task is due to be completed; enter the start time in the adjoining field.
    5. **Percentage Complete**. Enter a numerical value to indicate what percentage of the task has been completed.
    6. **Priority**. From the drop-down list, select a priority level that reflects the importance of completing this task.
    7. **Milestone**. Check this box if the completion on this task is considered a milestone for project completion.
    8. **Project Name**. Click Select and choose the project associated with the task.
    9. **Description**. Enter a brief description of the task.

3. Add timelines and Click **Save** to create the task; click Cancel to return to the project detail page without creating the task.

image.png

image.png

Bulk Actions

In list view, there are some groups of actions which can be done by selecting group of records wish are as follows:

- **Mass Update:** Apply changes to multiple project records at once.
- **Export:** Download the selected Projects data in a preferred format (.CSV).
- **Delete:** Remove selected Project from the system.

image.png

Detail View Actions

Clicking on the Name leads to the display of detail view of a record.

- **Edit:** Modify the selected record's details.

- **Delete:** Permanently remove the selected record.
- **Duplicate:** Create a copy of the selected record with the same information.
- **View Gantt:** Display the record in a Gantt chart view to visualize timelines and dependencies.
- **View Detail:** Open the full details of the selected record for review or analysis.

image.png

Project's Activities Management

- **Create Task:** Assign and track project-related work items with due dates and responsible team members.
- **Schedule Meeting:** Plan meetings linked to the project, including participants, time, and agenda.
- **Log Call:** Record details of project-related phone conversations for tracking and follow-up.
- **Compose Email:** Send and log emails related to the project to maintain clear communication records.

image.png

Project's History Management

- **Create Note or Attachment:** Add notes or upload files to document important project information and updates.
- **Archive Email:** Save relevant project emails to maintain a complete communication history.
- **View Summary:** Get a quick overview of key project details, recent activities, and status.
- **Filter:** Sort and narrow down project history by date, type, or keywords for easy review.

image.png

Submodules

Contacts

Manage and view all individuals associated with the project, including clients, team members, and stakeholders, along with their contact details.

image.png

Companies

Link and manage organizations involved in the project, such as clients, vendors, or partners, with access to their profiles and contact information.

image.png

Opportunities

Track potential business opportunities related to the project, including status, value, and progress through the sales pipeline.

image.png

Quotes

Manage and track sales quotations related to the project, including pricing, terms, and approval status.

image.png

Resources

Allocate and manage personnel, equipment, and materials assigned to the project, ensuring optimal utilization and availability.

image.png

Cases

Cases in the Projects submodule are records of specific issues or tasks related to a project, used to track and manage their resolution efficiently.

image.png

Bugs

Bugs are defects or errors identified within a project that require tracking and resolution to ensure project quality and stability.

image.png

Security groups

Security Groups define sets of users with specific permissions and access rights, controlling their ability to view or modify project-related data and functions.

`image.png

Revision #9
Created 17 May 2025 07:26:42 by Admin
Updated 22 May 2025 09:55:40 by Admin