

Target - Lists

The Target Lists module in KiyoCRM is used to separate Targets into groups, these can be groups of individuals that should be excluded from a particular Campaign, test groups or a list of Targets grouped by certain criteria, for example area or market an organization works in.

[image.png](#)

Target-List List View Actions

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

- **Create Target List** – A new form is opened in Edit View to allow you to create a new Target List record.
- **View Target Lists** – Redirects you to the List View for the Target Lists module. This allows you to search and list Target List records.

[image.png](#)

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

Note: Refer [Quick filter](#) of Leads.

- **Column Chooser** — The Column Chooser allows you to customize which columns are displayed in the list view by showing or hiding specific fields. Refer Leads [Column Chooser](#).
- To sort records on the Contacts List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Contact, Use Search engine on top
- Clicking on the pencil icon Contacts list view page to the display of record edit view.

Bulk Actions

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

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

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Detail Actions

Target List & Detail View Actions allow users to perform key functions such as view details, edit target information, delete, convert to lead/customer, manage subscriptions, log activities, and track history—all from the list or individual detail view.

- **Edit, Duplicate, Delete, Export** functionalities are similar to targets module. Refer targets module.

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Submodules

Targets

The **Targets** submodule under the Target List displays all individual target records, allowing users to view, manage, and take action on each potential lead or contact within a campaign or outreach list.

Can create a new one or select from existing from one

[image.png](#)

Contacts

The **Contacts** submodule stores and manages individual contact records, including personal and communication details. It allows users to track interactions, associate contacts with companies or deals, and maintain up-to-date relationship history.

Can create a new one or select from existing from one.

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Leads

The Leads submodule captures potential customers who have shown interest in your product or service. It allows users to manage lead details, track communication, qualify opportunities, and

convert leads into contacts, accounts, or deals.

Can create a new one or select from existing from one.

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Users

The Users submodule manages all CRM user accounts. It allows administrators to create, edit, assign roles, set permissions, and monitor activity for individuals who have access to the system.

Can select from existing from one.

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Companies

The **Companies** submodule stores and manages organizational records, allowing users to track company details, associate contacts and deals, and monitor all related activities and communication history.

Can create a new one or select from existing from one.

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Security Groups

The **Security Groups** submodule is used to define and manage access control within the CRM. It allows administrators to group users and assign specific permissions to control who can view, edit, or manage modules and records.

Can select from existing from one.

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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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