Targets

Typically Targets are used as the recipients of a Marketing Campaign, your organization knows very little about these individuals and they may be re-used for new Campaigns or deleted without any impact to the business. Your organization will spend little resources on Targets and will usually be contacted en masse. Targets can be acquired from purchased email lists or gathered from trade shows your organization has been present. The Targets module in KiyoCRM is used to store and manage information about these individuals.

List View Actions

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

- **Create Target** – A new form is opened in Edit View to allow you to create a new Target record.
- **View Targets** – Redirects you to the List View for the Targets module. This allows you to search and list Target records.
- **Import Targets** – Redirects you will be taken to the Import Wizard for the Targets module. Refer Leads Import.
- Recently viewed records displayed in the side nav bar.
- Saved filters list showing inside nav bar as My Filters
- Favorite records of targets 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. Refer Leads Column Chooser.
- To sort records on the targets List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a target, Use Search engine on top.
- Clicking on the pencil icon targets list view page to the display of record edit view.

image.png

Bulk Actions

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

- **Email:** Send an email to the selected targets directly.
- **Mass Update:** Apply changes to multiple target records at once.
- **Add to Target List:** Add selected target to a marketing or campaign list.
- **Export**: Download the selected target data in a preferred format (.CSV).
- **Map:** View the geographical location of targets on a map.
- **Delete:** Remove selected targets from the system.

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Quick Contact Options

In **List view** – Click to Call Configuration, WhatsApp and SMS icons are available for quick contacting. History should be tracked under a detailed view of every record under the History Submodule.

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

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Detail View Actions

"Targets Detail View" action displays complete information about a selected target, including name, contact details, status, source, and any associated activities or notes.

- **Edit** – Modify the target's existing information.

- **Duplicate** – Create a new target by copying current target details.

- **Delete –** Permanently remove the target from the system.
- **Convert Target**: Changes a target into a lead or customer for further engagement.

- **Manage Subscriptions**: Allows updating or modifying the communication preferences for the target.

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Target's Activities Management

This **Activities** tab in the target detail view allows users to manage interactions by creating tasks, scheduling meetings, logging calls, and composing emails related to the target.

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Target's History Management

The **History** section in Targets displays a chronological record of all past interactions and communications with the target, including completed tasks, calls, meetings, and emails, helping users track engagement over time.

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Submodules

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

Campaign Log

The Campaign Log in the Targets submodule records all marketing campaigns the target has been involved in, including email blasts, newsletters, or promotional activities, helping track campaign reach and effectiveness.

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Events

The **Events** section in the Targets submodule logs all calendar-based activities related to the target, such as scheduled meetings, webinars, or conferences, allowing for effective tracking and follow-up.

Can create a new or select from existing one.

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Security Groups

The Security Groups section in the Targets submodule defines which users or user roles have permission to view, edit, or manage the target's information, ensuring controlled access and data security.

Can select from existing 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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