

Tasks

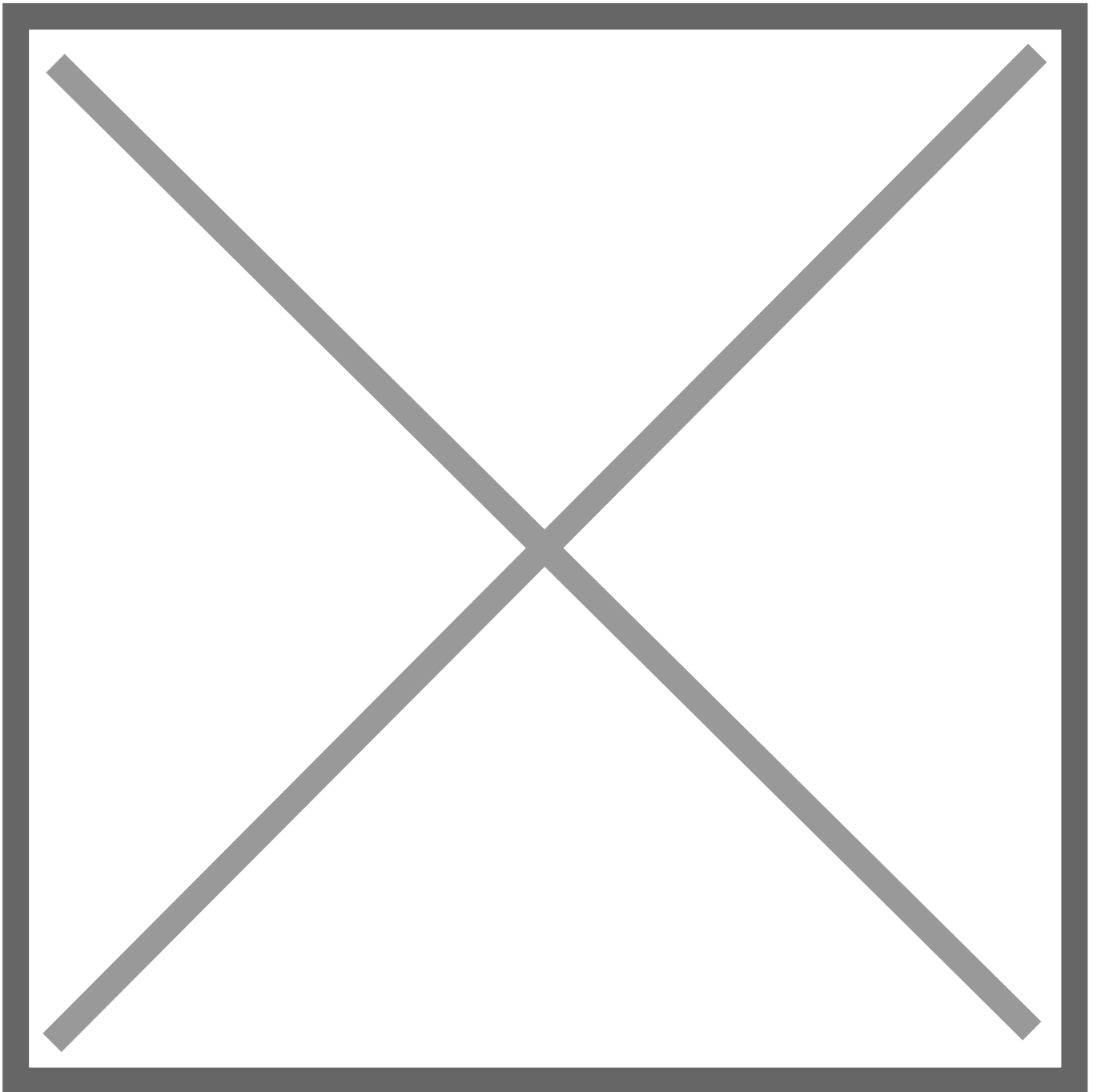
KiyoCRM can assist users with productivity, offering a way to record, relate and assign Tasks and to-do items that require action.

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

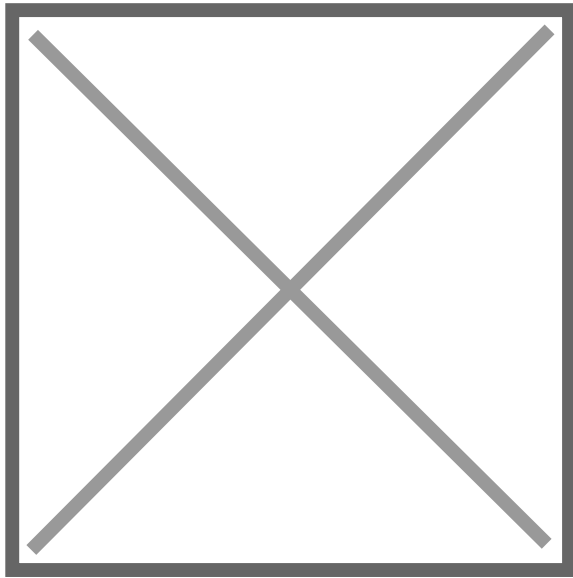
List View Actions

- **Create Task** – A new form is opened in Edit View to allow you to create a new Task record

Used to define and assign work items with details like subject, due dates, status, priority, and related contacts or companies. The assigned user will receive email notifications.



- **View Tasks** – Redirects you to the List View for the Tasks module. This allows you to search and list Task records
- **Import Tasks** – Redirects you to the Import Wizard for the Tasks module. For more information, see the Leads Module [Import](#).
- **Kanban View, Filters, Column Chooser, Favorites** are similar to other modules. Refer Leads module [Column Chooser](#) , [Filters](#) , [Kanban View](#) for reference.

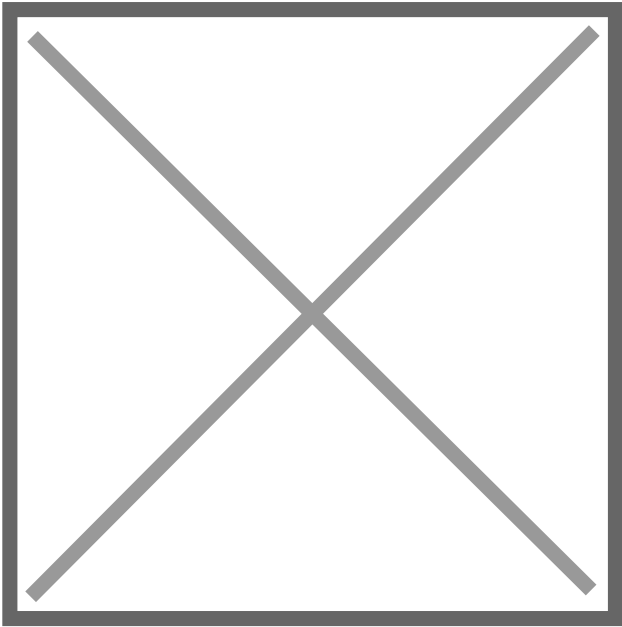


- To sort records on the Meetings List View, click any column title which is sortable. This will sort the column either ascending or descending.
- To search for a Meeting, Use Search engine on top
- Clicking on the pencil icon Meetings list view page to the display of record edit view.
- Clicking on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

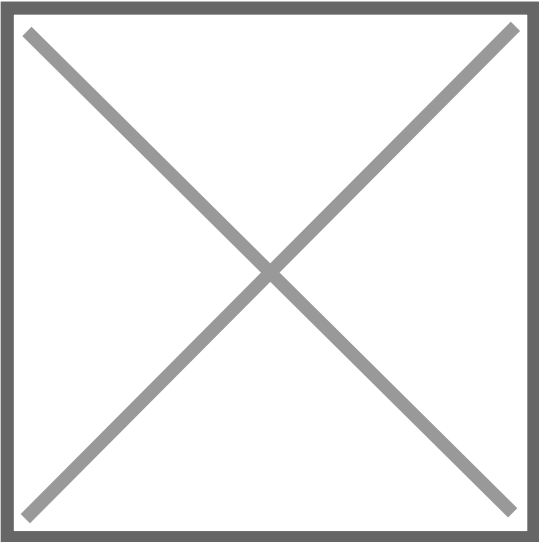
- **Mass Update, Export, Delete** are similar to the Meetings module. Refer Meetings module [Bulk Actions](#) for reference.



Detail View Actions

Click on the Subject to view detail view:

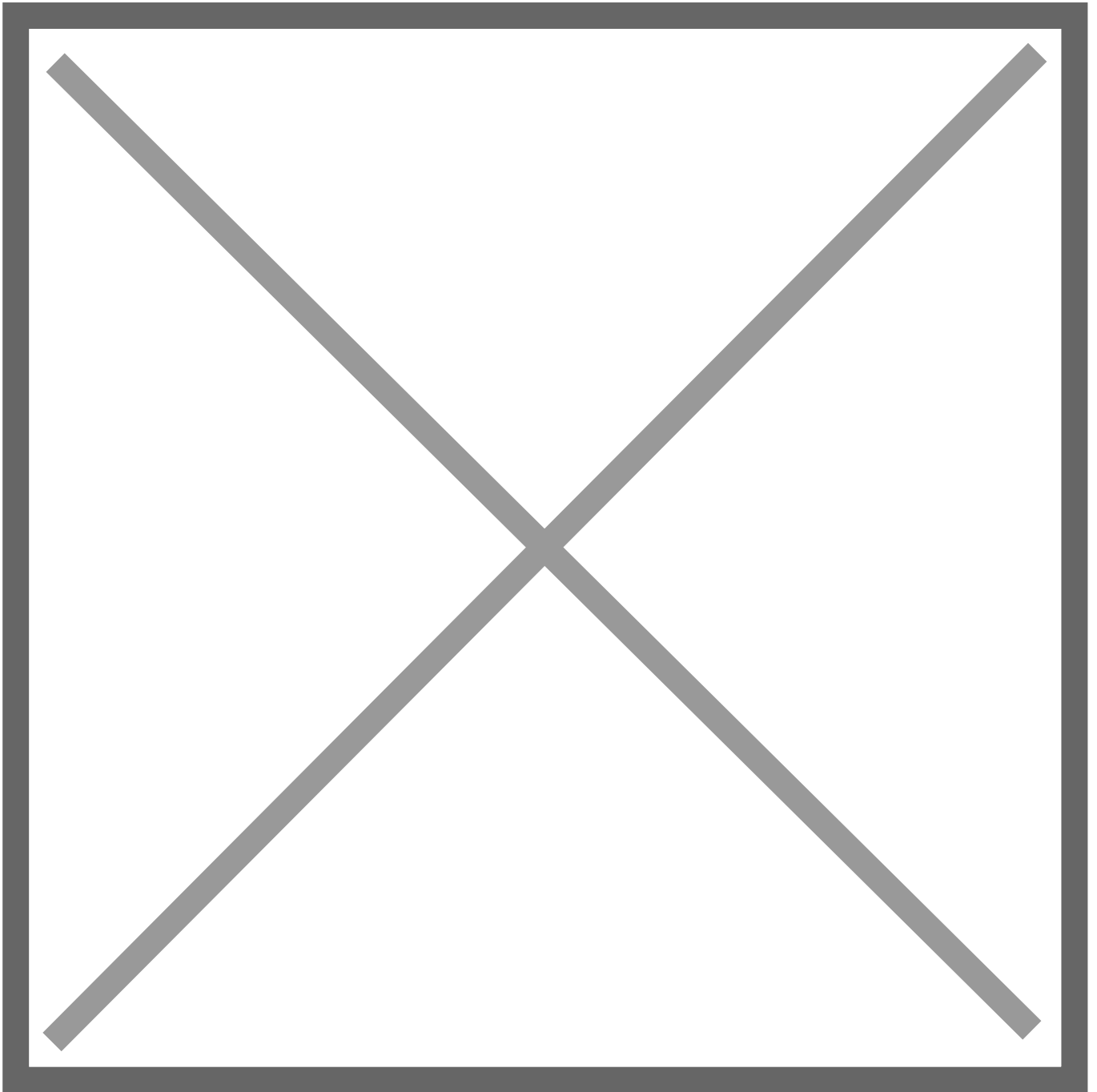
- **Edit, Duplicate, Delete, Close and Create New, Close** functionalities similar to Meetings module detail view actions. Refer Meetings module [Detail Actions](#).



Submodules

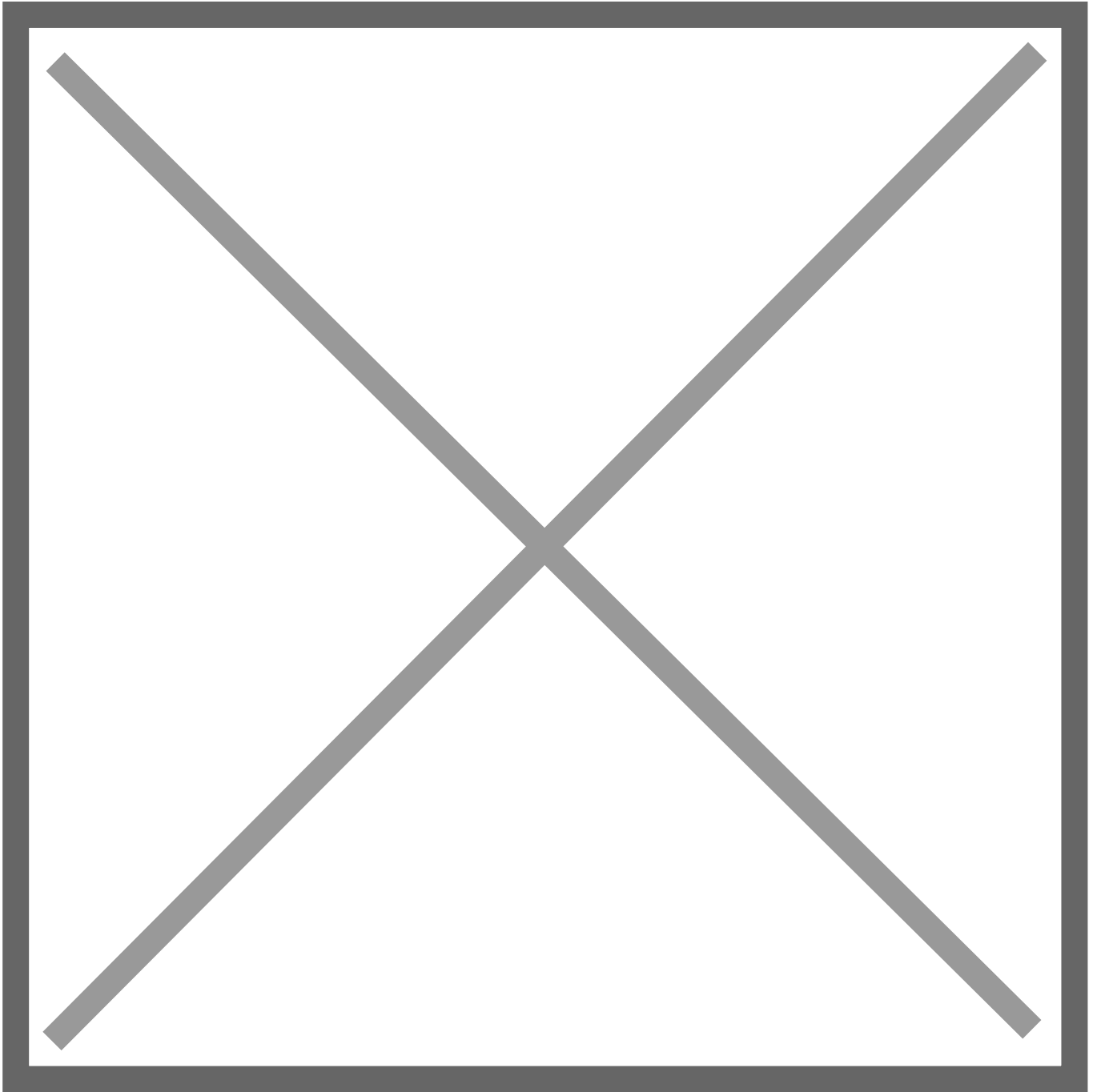
Notes

Used to add internal comments or updates related to a task for reference or collaboration.



Security Groups

Control user access and permissions for task creation, editing, viewing, and assignment based on roles.



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 #7

Created 12 May 2025 09:33:32 by Admin

Updated 22 May 2025 09:55:40 by Admin