

CITK

Followers



Followers : CITK

The 'Followers' feature for Contacts and Opportunities allows multiple users to follow and access the same record. This provides you the ability to add up to 10 users as followers who are able to view and edit the CRM record when the "Only Assigned Data" user permission is turned on

Followers can be added to contacts on the detailed page of the record.

The screenshot shows a CRM interface for managing followers. At the top, there is a header with the text 'Owner (Assign To)' and a dropdown menu showing 'MU madhu acco...'. To the right of this is a section titled 'Followers' with a '+' button and a 'Mark a' button. Below this is a search bar labeled 'Search'. A list of users is displayed, each with a small profile icon and their name and email address. The users listed are:

- CC checking contact
cor...@il.com
- MA madhu account admin
mad...@gmail.com
- MA madhu agency user
mad...@mail.com
- MA madhu agency admin 1
...@l.com
- NC new contact sure
newconract@gmial.com

At the bottom of the list, there is a blue link labeled 'Opportunity'.

17:22

Opportunity Followers

Add followers to opportunities in the "Opportunity Details" on the Edit/Add opportunity modal

The screenshot shows the 'Opportunity Details' modal with the 'Followers' section highlighted. The 'Followers' section contains a list of users: 'checking contact' and 'madhu agency user'. Below this list is a dropdown menu with the same two options, 'checking contact' and 'madhu agency user', both of which have a checkmark and a checkmark icon next to them. The 'Followers' section is enclosed in a light blue box. The rest of the modal includes fields for 'Owner' (set to 'madhu account user'), 'Business Name' (input field 'Enter Business Name'), and 'Tags' (input field 'Please Input Tag name' with options 'is it', 'ds', 'bad', and 'cold_email').

Followers
checking contact
madhu agency user

Followers
checking contact
madhu agency user

Tags
Please Input Tag name
is it
ds
bad
cold_email