

1.3 Set up Elasticsearch integration

This enhancement is only available in KiyoCRM from version 7.11 onwards.

Configure the Elasticsearch connection

Go to the admin panel, scroll down to the Search settings, and open the Elasticsearch setting page. Enable Elasticsearch from the checkbox and fill the host, user and password fields. Simply leave user and password blank if you have anonymous access enabled.

If you are running both KiyoCRM and Elasticsearch via Docker, the hostname must be the name of the Elasticsearch container.

[image.png](#)

You can use **Test connection** to see if the current configuration is working.

Once you are satisfied with your settings hit **Save**.

Initial indexing

After having saved, perform a full indexing by opening the Elasticsearch setting page again and now pressing **Schedule full indexing**. This task starts running within a minute, provided that the crontab has been configured correctly.

Switch the search engine to Elasticsearch

Now go to the Search Settings and set `Elasticsearch Engine` as the search engine. You can customize the modules that are used for indexing in the modules section.

[image.png](#)

Setup the scheduled task

The Elasticsearch data is updated each time a record is created, changed, deleted and imported. Nevertheless, a scheduled task keeps the elastic data in sync with the KiyoCRM database.

Go to the admin panel, open Scheduler. Check if a Task with a name like "Perform Elasticsearch index" already exists.

If no such task exists, then on the side panel click "Create Scheduler".

- In the Jobs dropdown, select "Elasticsearch indexer"
- At Job Name, enter a self-chosen title, for example "Perform Elasticsearch index"
- At Interval you specify the frequency at which the job should run. A frequency of about once a day should be sufficient. To have the task run at 4 o'clock at night, click "Advanced Options" and enter 0 at min and 4 at hrs., leave date, mo., day as they are.
- hit **Save**.

As AOD Lucene Indexing will no longer be used, edit the following entries in the Scheduler list, set status to "inactive", hit **Save**:

- Perform Lucene Index
- Optimize AOD Index

Make sure that you have correctly configured the crontab configuration, as described at the bottom of the Schedulers page.

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