

# Introduction

## The KiyoCRM Team and Vision

KiyoCRM is a result of the innovation, dedication, and long-standing experience of the Kiyo Solutions team. Built with a mission to empower organizations with flexible and scalable CRM solutions, KiyoCRM combines modern user experience with powerful automation to meet the needs of businesses across industries. KiyoCRM has been thoughtfully developed with continuous input from real-world users, consultants, and CRM experts, ensuring a platform that's both robust and adaptable.

Our team is committed to delivering an intuitive, high-performance system that simplifies CRM complexity, helps teams sell smarter, and supports customers more efficiently. With each release, new features and improvements are added to enhance usability, performance, and flexibility — making KiyoCRM one of the most configurable low-code CRM platforms on the market today.

## What is KiyoCRM?

KiyoCRM is a powerful, low-code Customer Relationship Management system designed for businesses of all sizes. It is available in two models — **KiyoCRM Lite**, a SaaS-based platform for small and mid-sized businesses, and **KiyoCRM Pro**, a fully customizable on-premise/enterprise-ready solution designed to support complex CRM needs.

KiyoCRM includes a comprehensive set of modules covering Sales, Marketing, Support, and Operations. It provides full control over workflows, automation, access roles, data security, and user experience — all without the need for heavy coding. Whether you're looking to manage your leads, track your sales pipeline, run automated campaigns, or handle customer support cases, KiyoCRM offers a seamless and efficient way to do so.

KiyoCRM also supports powerful integrations — from Google and Outlook calendars to payment gateways and messaging platforms like WhatsApp and SMS — giving businesses a unified system that adapts to their operations.

## Our Mission

Kiyo Solutions' mission is simple:

- To provide a powerful CRM platform that grows with your business.
- To enable teams to work smarter, automate routine processes, and deliver exceptional customer experiences.

- To foster innovation through open customization, flexible deployment, and continuous enhancements.

We believe that a CRM should work *for you*, not the other way around.

# What's in This User Guide?

This User Guide is crafted for end users, admins, and teams adopting KiyoCRM in their day-to-day operations. Whether you're a sales rep logging your first lead, a marketing manager launching a campaign, or a system administrator configuring access roles, this guide will walk you through each part of the platform with clear, practical instructions.

Topics in the guide include:

- Getting Started with KiyoCRM
- Navigating the Dashboard
- Managing Leads, Contacts, and Companies
- Tracking Opportunities and Sales Pipelines
- Creating Quotes, Invoices, and Contracts
- Running Marketing Campaigns
- Handling Support Tickets and SLAs
- Configuring Workflows and Automations
- Customizing Modules and Fields
- Generating Reports and Analytics

No prior experience with KiyoCRM is necessary, though basic familiarity with CRM concepts and standard web applications will help. This guide aims to be your go-to companion in making the most of KiyoCRM's features and helping your team achieve CRM success.

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