

System

System Settings

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User Interface

These user interface settings apply system-wide, although some (for example **Show Full Names**) can be overridden by individual users in their user profile.

Listview items per page	The number of records to display per page in the list view of each module.
System Name	This name will be displayed on the browser tab.
Current Logo	This shows the logo currently displayed on the login screen
Select Logo	Click Choose file select logo file. Images can be .png or .jpg format.
Lead Conversion Options	
Enable inline editing	Enables records to be edited from list or detail view by double clicking on the item to be edited.
Show Full Names	Displays full names for users, rather than usernames in Assigned To fields.

Configure AJAX User Interface

Click the **Configure Ajax User Interface** link to display the configuration options.

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Drag and drop modules between the columns to enable/disable AJAX.

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Proxy Settings

Select the **Use Proxy server?** checkbox to configure proxy server address and authentication settings.

Google Authentication

This is where you upload the JSON credential file for Google Calendar Sync.
See the Google Credentials and Syncing Section.

Advanced Settings

Developer Mode	Turns off caching so that code changes to files will be seen immediately. See the Developer Guide for more information.
vCal Updates Time Period	Set the number of months in advance to show free/busy information for invitees when scheduling calls and meetings.

Logger Settings

Specify log filename, extension and size as well as the log level here. See the chapter on logging for more information.

Click the View Log link to view the log file.

Import Wizard

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The Import Wizard is also available from the sidebar of all import-enabled KiyoCRM modules. Select the module to import data into and click **Next** to launch the wizard.

Locale

Set system-wide settings for locale here, including date and time formats, system currency and export settings. Currencies can be added to KiyoCRM via the Currencies panel.

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Note that date and time settings can be overridden by the user in their user profile

Upgrade Wizard

The Upgrade Wizard provides a quick and simple way to upgrade your Kiyocrm application. Download the required upgrade package and check your system compatibility before running the wizard.

See Using the Upgrade Wizard for full instructions on upgrading.

Currencies

Use this section to add a currency to **Kiyocrm**. The default currency can be set in the [Locale](#) section.

Entering the ISO 4217 code for the currency will autofill the Currency Name and Currency Symbol fields.

You must also specify a currency conversion rate before saving the new currency settings.

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Backups

The **Kiyocrm** application files can be backed up using this tool. Please note that you should also perform regular backups of your database - see the vendor's documentation for details on how to do this.

Languages

Download language packs for Store [here](#).

Repair

Selecting Repair from the System Settings panel displays a wide range of repair options for KiyoCRM which will run automatically when the link is clicked. **KiyoCRM** may direct you to run particular Repair commands, for example following an upgrade using the [Upgrade Wizard](#).

Quick Repair and Rebuild is the most often used command here and will be required after installing a new module via Module Loader for example, or to display changes to code during development when [Developer Mode](#) is not set.

When running a Quick Repair and Rebuild, be sure to scroll to the bottom of the page to view any new SQL code which may need to be executed to ensure that your database tables are correctly synced with any changes that have been made.

The following functions are available to you in the section:

Quick Repair and Rebuild

Repairs and rebuilds DB, Extensions, Vardefs, KiyoCRM Dashlets etc.

Expand Column Width

Expands certain char, varchar and text columns in database (MSSQL ONLY)

Rebuild .htaccess File

Rebuilds .htaccess to limit access to certain files directly

Rebuild Config File

Rebuilds config.php by updating version and adding defaults when not explicitly declared

Rebuild Relationships

Rebuilds relationship metadata and drops the cache file

Rebuild Schedulers

Rebuilds out-of-the-box Scheduler Jobs

Rebuild KiyoCRM Dashlets

Rebuilds the KiyoCRM Dashlets cache file

Rebuild Javascript Languages

Rebuilds javascript versions of language files

Rebuild JS Compressed Files

Copies original Full JS Source files and replaces existing compressed JS files

Rebuild JS Grouping Files

Re-concatenates and overwrites existing group files with latest versions of group files

Rebuild Minified JS Files

Copies original Full JS Source Files and minifies them, then replaces existing compressed files

Repair JS Files

Compresses Existing JS files - includes any changes made, but does not overwrite original JS Source files

Repair Non-Lowercase Fields

Repair mixed-case custom table(s) and metadata file(s) to fix issues where code expects lowercase field names

Repair Roles

Repairs Roles by adding all new modules that support Access Controls, and by adding any new Access Controls to existing modules

Repair Inbound Email Accounts

Repairs Inbound Email accounts and encrypts account passwords

Sync Inbound Email Accounts

Sync Inbound Email Accounts and Emails

Remove XSS

Removes XSS Vulnerabilities from the database

Repair Activities

Repairs Activities (Calls, Meetings) end dates

Enable/Disable Seed Users

Quickly enable or disable seed users populated during demo installation.

Remove missed files from upload directory

Please note that removal can take a lot of time

Global Search

The Global Search functionality is used to search for records using the search bar on the main navigation menu. Add or remove modules from the Global Search here.

See the User Interface guide to the global search for more information.

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Diagnostic Tool

The diagnostic tool allows you to gather system configuration information which can be downloaded via a .zip file for analysis.

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KiyoCRM config.php	Includes a copy of the config.php file from the KiyoCRM root directory. This contains many of the system settings options such as date formats, currency information, password configuration alongside configuration details such as database settings and KiyoCRM version
KiyoCRM Custom directory	Includes a copy of the custom directory, which contains any field or layout customizations made, either through Studio or via code.
phpinfo()	Includes the output of the phpinfo() function, containing information about the php configuration on the server
MySQL - Configuration Table Dumps	Includes a folder MySQL/Table Dumps in the diagnostic zip file with an html file for each configuration table in KiyoCRM. Each file contains field definitions (field names, data types etc), indexes (name, type and fields in the index) and data from the relevant table.
MySQL - All Tables Schema	Includes the file MySQL/TableSchema/TableSchema.html with two sections for each table in KiyoCRM- field definitions (table name, data types etc) and indexes (name, type and fields in the index)
MySQL - General information	Includes a file MySQL/MySQL-General-info.html containing database information such as version number and character sets

Select the information you require and click **Execute Diagnostic**.

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Once complete, click the link to download the zipped diagnostic file.

Connectors

This section to be completed.

Themes

From 7.9 onwards, only the Kiyo theme is available. For earlier versions, you can set the default theme, and which other themes are available for users to select here.

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From 7.10 onwards, there is a choice of theme colors for Kiyo which can be set from the User profile.

Scheduler

KiyoCRM uses a number of Scheduler jobs running at scheduled times, supporting functionality such as search indexing, workflows, email notifications, database maintenance and sending campaign emails.

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Setting up the Scheduler

Scheduler jobs need to be manually enabled. This is done by running a script called cron.php every minute. This, in turn, manages all KiyoCRM jobs according to their proper schedules.

In Windows this is setup using Task Scheduler, and in Linux and iOS, it is setup in crontab. Detailed instructions for your system will be displayed during installation and can also be found on the Schedulers page, under the list of scheduled jobs.

See Scheduler Jobs in KiyoCRM in Linux - the Definitive Guide for an in-depth guide to setting up and managing scheduled jobs in Linux.

Configuring Scheduled Jobs

Click on a scheduled job to view settings

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In edit mode, you can set the job status (only Active jobs will run) and configure the interval at which the job runs as well as the start time. Unchecking the 'Advanced Options' box will show a more user-friendly way to set the job interval if you are not familiar with the crontab notation. Re-

checking Advanced Options will let you set the initial start time.

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Activity Streams

By default, the Activity Stream dashlet displays recent updates for the Opportunities, Contacts, Leads and Cases modules.

The Activity Stream admin panel allows you to configure what is displayed on the activity feed and which features are available to users.

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Enable MyActivity Stream Dashlet:	Enables/disables the Activity Stream dashlet for all users
Activate Feeds For:	Select the modules to display activity for
Activate User Feed:	Allows users to enter messages in the status update field for broadcast to all users

Please see the user interface guide for further information on how to use the Activity Stream.