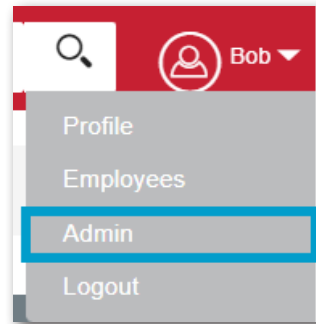


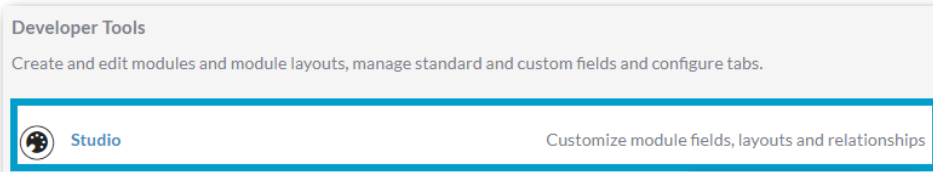
Visit support.fibrecrm.com for more info or contact your CRM Manager

Edit the Pop Up View

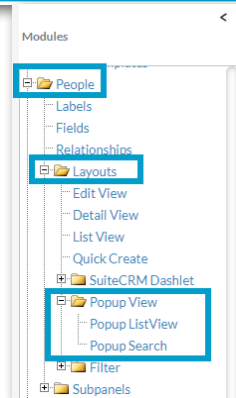
1. As an Admin in CRM you can edit what fields can be seen in a Pop Up View. The Pop Up view is the pop up box a user sees when using the select arrow such as adding a primary contact to an Organisation. To edit a Quick Create Form Layout, navigate to your username in the top right hand corner and in the drop down list select Admin.



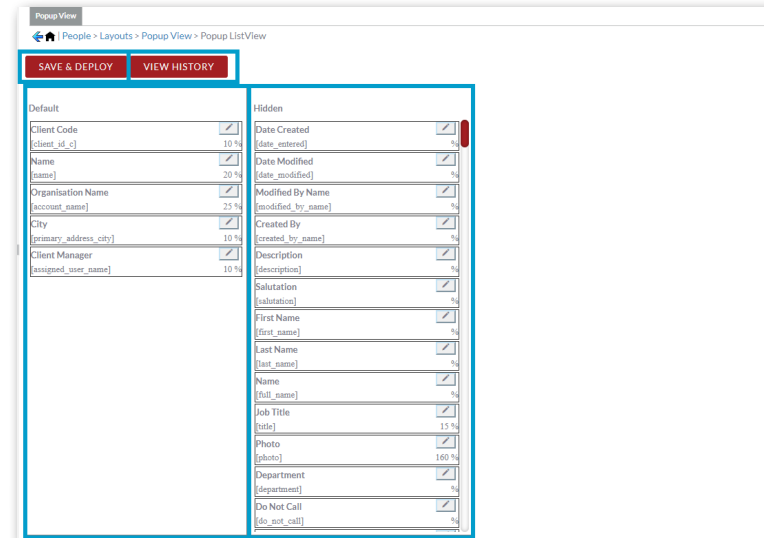
2. Scroll down to Developer Tools and then select Studio.



3. In the tree on the left hand side, select the + button next to the module name to open up the options. Then select the + button next to Layouts, to find Pop Up View. Use the + button again to open up and select the Pop Up List View or Pop Up Search option. The way to edit both options works exactly the same way.



4. In the layout edit screen all the fields that can be displayed are listed either in the Default or Hidden column. The Default column contains the fields that are displayed in the list view or if you're searching. The Hidden column contains fields that are available to select but can be seen by a user in the pop up box screen. Drag and drop fields between the Default and Hidden column to choose which fields you would like displayed.



5. Once you've made all your changes click Save & Deploy, this will make save the changes you've made and deploy them to the module. The View History button lets you view and restore a previous saved layout.

6. Once saved and deployed the fields you have selected will now be able in the pop up view for that module.

