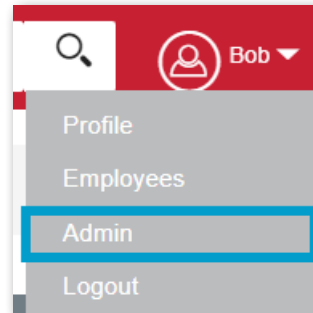


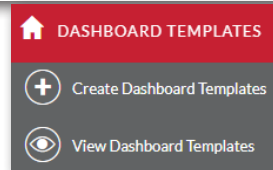
Visit support.fibrecrm.com for more info or contact your CRM Manager

User Dashboard Management

1. As an Admin in CRM you can use the **Dashboard Copy** functionality to copy dashboards from a selected user and clone them to be deployed to other **Users** or **Security Groups**. To do this first navigate to your username in top right hand corner and in the drop down select **Admin**. Scroll down to the bottom of the page and select **Dashboard Copy Management**.



2. Select **Create Dashboard Template**.



3. On the **Create** screen enter a Name. Use the select arrow to choose which **User** the **Dashboard** will be copied from. You can also use the tick box if you want the dashboard to be a default for new users. Click **Save & Close** once done.

CREATE

SAVE AND CLOSE SAVE CANCEL

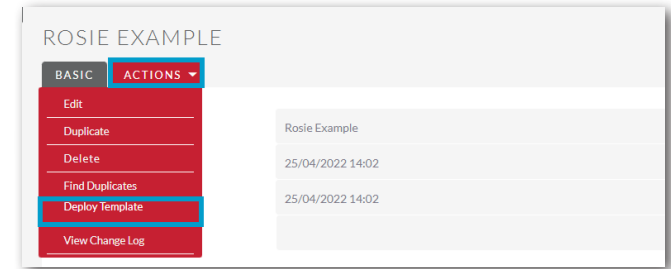
BASIC

Name* [] Copied From User: [Bob Smart]

Default for new Users: ☐ Only one template allowed to be default. If checked all other labels will be unchecked

Description: []

4. You'll then be taken to the created template. In the **Actions Menu** select **Deploy Template**.



5. Using the drop down menu select whether you want to deploy to **Users**, **Roles** or **Security Groups** and press **Continue**. Keep in mind when using groups and roles that a user may be in multiple groups or roles and deploying will override any previous deployments.

6. Select any number of users, roles, or groups using the drop down menu or click **Select All** to select all in the list. Once done click **Deploy Template to Selected**.

7. Once deployed a list will be created in **Dashboard Deployments** subpanel. This list will show all the deployments of that dashboard that has occurred, these can be restored to users if necessary.

DASHBOARD DEPLOYMENTS				
Name	Deployed to	Copied From User	Date Created	Date Modified
Backups: Standard User Dashboard - CI	Carl Junior	Bob Smart	15/05/2017 13:27	15/05/2017 13:27
Standard User Dashboard - RP	Rachel Preston	Bob Smart	08/05/2017 09:18	08/05/2017 09:18
Backups: Standard User Dashboard - RP	Rachel Preston	Bob Smart	15/05/2017 13:21	15/05/2017 13:21
Standard User Dashboard - RP	Rachel Preston	Bob Smart	08/05/2017 08:41	08/05/2017 08:41