fibreCRM HEART OF THE PRACTICE

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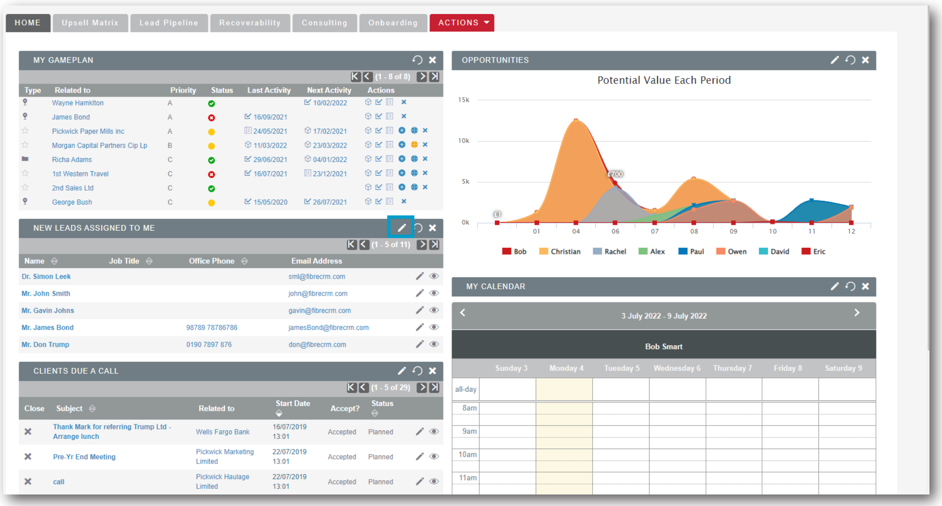
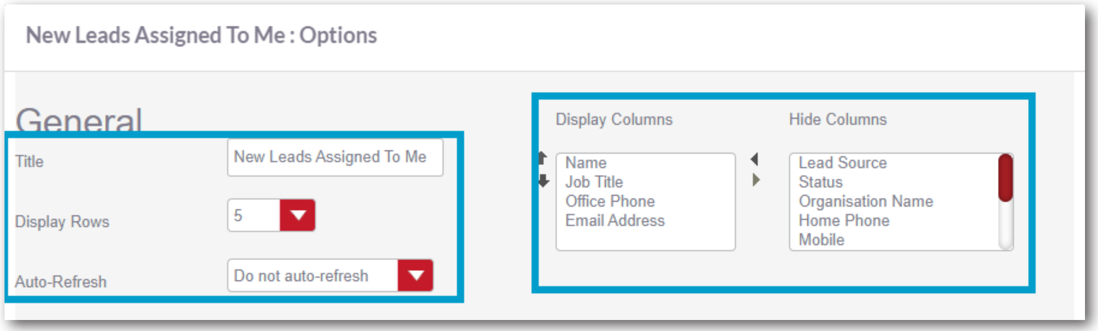
Editing a Dashlet

1. **Dashlets** are customisable sections of your **Dashboard** and can be changed to display information from the CRM such a **Reports**, **Client Data**, **Tasks**, **Opportunities** and **Onboarding Information**. The Dashlet views are available to configure for each module able to be displayed as a Dashlet so the information you'd like to see on a **Lead** dashlet does not have to contain the same information as an **Opportunity** dashlet.

2. To edit a Dashlet select the **Pencil/Edit** icon located at the top right of the Dashlet.



3. A pop up will then appear with two sections: **General:** Here you can; edit the title, choose how many rows are displayed and select if/when the dashlet auto refreshes . You can also choose what fields are displayed in the Dashlet by using the select arrows to move the fields between the **Hide** and **Display** columns. To change the order of the fields that are displaying in the Dashlet use the **Up** and **Down** arrows.



4. **Filters**: Here you can use the **Search Filters** to narrow down results of fields you'd like to see on your Dashlet. Select the tickbox to see records only assigned to yourself. What you can search by will have been set by an **Admin** CRM user. If you'd like to filter by something that is not displayed contact your Admin for them to make the changes. Once you've made the changes you wish then click **Save** to apply.