fibre CRM

HEART OF THE PRACTICE

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

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.

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3. 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.

General		- Г	Display Columns		Hide Columns	
Title Display Rows	New Leads Assigned To Me	r t	Name Job Title Office Phone Email Address	4	Lead Source Status Organisation Name Home Phone Mobile	

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.

