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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 as 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.

The screenshot shows a dashboard with several dashlets. At the top, there are navigation tabs: HOME, Upsell Matrix, Lead Pipeline, Recoverability, Consulting, Onboarding, and ACTIONS. The main content area is divided into four sections:

- MY GAMEPLAN:** A table with columns for Type, Related to, Priority, Status, Last Activity, Next Activity, and Actions. It lists several leads with their details.
- OPPORTUNITIES:** A line chart titled 'Potential Value Each Period' showing values over time for different users.
- NEW LEADS ASSIGNED TO ME:** A table listing leads assigned to the user, with columns for Name, Job Title, Office Phone, and Email Address.
- CLIENTS DUE A CALL:** A table listing clients due for a call, with columns for Close, Subject, Related to, Start Date, Accept?, and Status.

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.

The screenshot shows the 'New Leads Assigned To Me : Options' dialog box. The 'General' section is highlighted with a blue border. It contains the following fields:

- Title:** New Leads Assigned To Me
- Display Rows:** 5 (with a dropdown arrow)
- Auto-Refresh:** Do not auto-refresh (with a dropdown arrow)
- Display Columns:** Name, Job Title, Office Phone, Email Address
- Hide Columns:** 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.

The screenshot shows the 'Filters' dialog box. It contains the following options and fields:

- Only My Items:**
- Date Created:** --None-- (with a dropdown arrow)
- Status:** --None-- (with a dropdown arrow), New, Assigned
- Lead Source:** --None-- (with a dropdown arrow), Campaign, Cold Call
- Assigned User:** Alex Barber, Alex Winner, Bob Smart
- Buttons:** SAVE, CLEAR