fibre CRM

HEART OF THE PRACTICE

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Editing the Available Fields for Dashlet Editing View

As an Admin of CRM you can • customise what fields the user can choose and filter by when customising a Dashlet on their Dashboard. To edit a the fields that are available for a user when editing a Dashlet first navigate to your Username in the top right hand corner and in the drop down list select Admin.



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

Developer Tool	s
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Create and edit modules and module layouts, manage standard and custom fields and configure tabs.

🛞 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 SuiteCRM Dashlet. Use the + button again to open up the SuiteCRM Dashlet List View or SuiteCRM Dashlet Search options.



Convert Lead

- Edit View

List View

Detail View

Quick Create

ListView SuiteCRM Dashle

SuiteCRM Dashlet

- SuiteCRM Dashlet

4. Dashlet List View edit page you'll see three columns where all the fields that can be displayed in the Display and Hide columns located in the General section when the user is editing their Dashlet appear here. The Default column contains fields that will be seen in the Display column that will show by

SAVE & DEPLOY VIEW	HISTORY			
Default	Available	Hidden		
Name	Lead Source	Modifie	d By Name	/
[name]	30 % [lead_source]	10 % [modifie	d_by_name]	
Job Title	Status	Creater	By	1
[title]	20 % [status]	10 %	[by_name]	
Office Phone	Organisation Name	Z Descrip	tion	1
[phone_work]	20 % [account_name]	40 % [descrip	ion]	
Email Address	Home Phone	Salutat	on	1
[email1]	30 % [phone_home]	10 % [salutati	m]	
	Mobile	First Na	me	1
	[phone_mobile]	10 % [first_nz	me]	
	Other Phone	Last Na	me	1
	[phone_other]	10 % [last_na	ae]	
	Date Created	Name		/
	[date_entered]	15 % [full_na	1e]	
	Date Modified	Photo		/
	[date_modified]	15 % [photo]		160
	Created By	Depart	nent	1
	[created_by]	8 % [departn	ent]	
	Assigned to	Z Do Not		1
	[assigned_user_name]	8 % [do_not	call]	
		Fax		1
		[phone_		
		Lawful	tasis	/

default when adding a Dashlet. The **Available** column contains fields that are available to a user from the **Hide** column when editing. The **Hidden** column contains fields that a user won't be able to see or pick from. To make changes drag and drop the fields into the columns you would like them in. You can view previous layouts by select **View History**. Once you're happy with your changes select **Save & Deploy**.

5 In the SuiteCRM Dashlet Search 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 a user can filter/search by. The Hidden column contains fields that are available to filter by but can not be seen

& DEPLOY VIEW HISTORY		
	Hidden	
	Name	
ated /	[name]	<u> </u>
1	Date Modified [date_modified]	
roe	Modified By Name	/
rce]	[modified_by_name]	
User		/
_user_id]	[created_by_name]	
	Description	/
	[description]	
	Assigned to	7
	[assigned_user_name]	
	Salutation	/
	[salutation]	
	First Name	/
	[first_name]	
	Last Name	/
	[last_name]	
	Name	7
	[full_name]	
	Job Title	/
	[title]	
	Photo	/
	[photo]	
	Department	
	[department]	

Dashlet edit screen. Drag and drop fields between the **Default** and **Hidden** column to choose which fields you would like users to filter by. Once you're happy with your changes select **Save & Deploy**.