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 Tools	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.



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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 VIE	WHISTORY			
Default	Available		Hidden	
Name	Lead Source	/	Modified By Name	/
[name]	30 % [lead_source]	10 %	[modified_by_name]	
Job Title	Status	1	Created By	1
[title]	20 % [status]	10 %	[created_by_name]	
Office Phone	Organisation Name	1	Description	1
[phone_work]	20 % [account_name]	40 %	[description]	_
Email Address	Home Phone	/	Salutation	/
[email1]	30 % [phone_home]	10 %	[salutation]	_
	Mobile	1	First Name	1
	[phone_mobile]	10 %	[first_name]	_
	Other Phone	/	Last Name	/
	[phone_other]	10 %	[last_name]	_
	Date Created	/	Name	/
	[date_entered]	15 %	[full_name]	
	Date Modified	/	Photo	/
	[date_modified]	15.96	[photo]	160
	Created By	/	Department	/
	[created_by]	8 %	[department]	
	Assigned to	/	Do Not Call	/
	[assigned_user_name]	8 70	[do_not_call]	-
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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

Leads > Layouts > SuiteCRM E	lashlet > SuiteCRM Dashlet Search	
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	Date Modified	
	[date_modified]	
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ed User	Created By	/
ed_user_id]	[created_by_name]	
	Description	/
	[description]	
	Assigned to	/
	[assigned_user_name]	
	Salutation	/
	[salutation]	_
	First Name	/
	[first_name]	
	Last Name	/
	[last_name]	
	Name	/
	[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**.