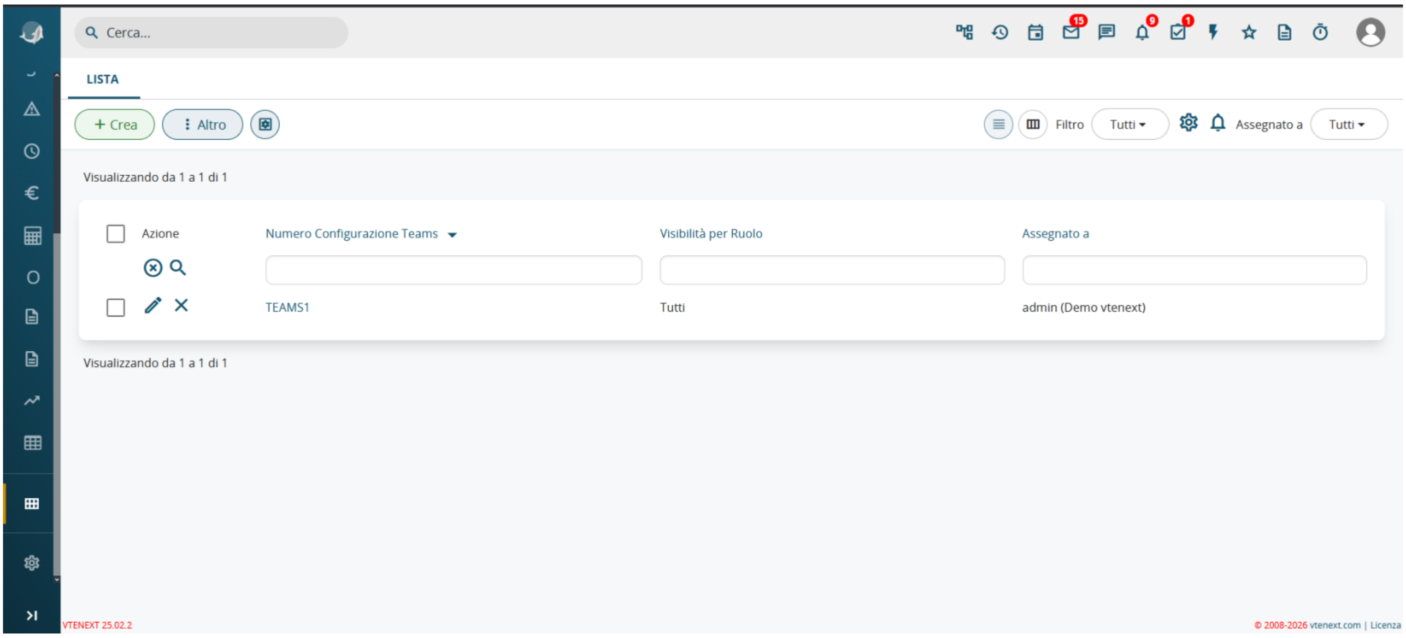
Popup Configuration

Creation and management of TeamsPhone Plugin popup configurations: displayed fields, quick actions, and role assignment.

Where to Find It

Popup configuration management is available in vtenext **Settings**. Search for **Teams Popup Configurations** in the Settings search bar.



The list shows the configuration number, role visibility, and assigned user. From this page, administrators can create, edit, or delete configurations. Each configuration is independent and can be designed for a specific role.

Create a New Configuration

Click **+ Create** on the Popup Configurations page. The form contains four sections:

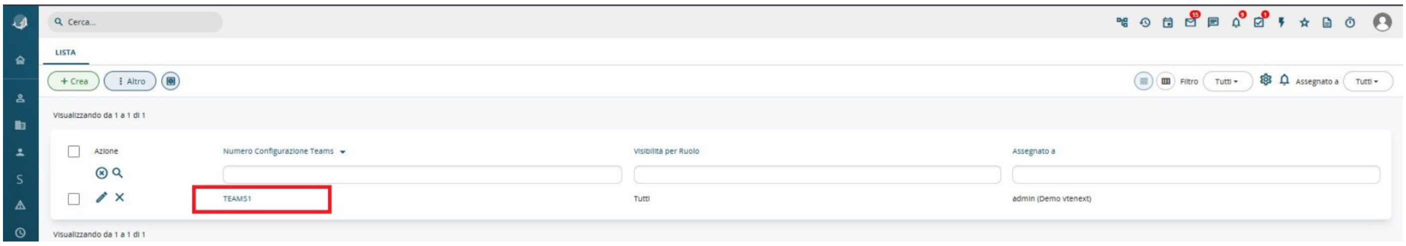
- **Teams Popup Configuration Information:** automatically generated configuration number, assigned user, active status, and one or more visible roles.
- **Teams Popup Field Configuration:** CRM modules and fields displayed in the popup.
- **Teams Mention Configuration:** secondary searches in linked modules.
- **Descriptive Information:** an internal description that is not shown to operators.

Rows can be added, reordered, or removed. Save the configuration with **Save** or leave without saving with **Cancel**.

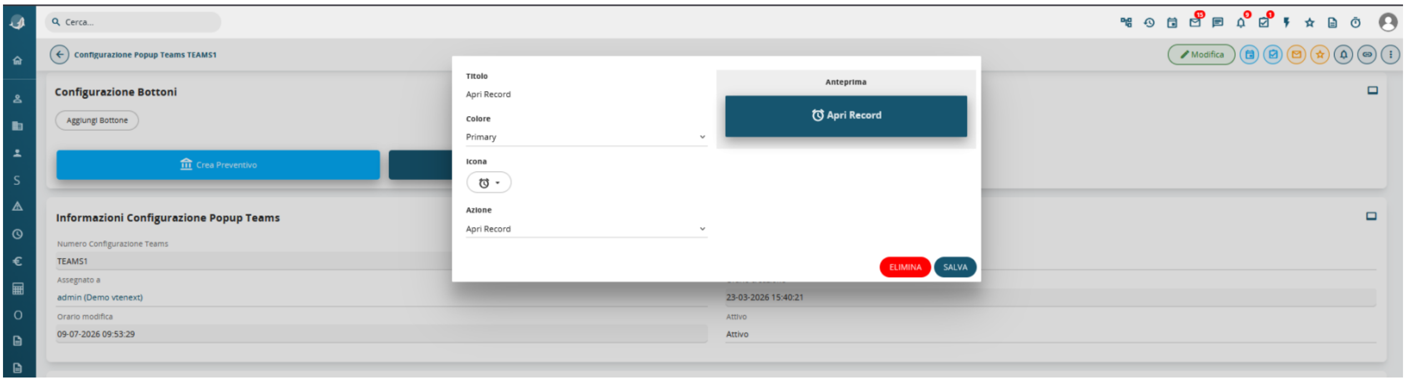
> Quick-action buttons cannot be configured during initial creation. They become available on the configuration detail page after the record has been saved.

Configuration Detail Page

Open an existing configuration to view its detail page.



Button Configuration displays the quick-action buttons shown during calls. Click **Add Button** to define its title, colour, icon, and action, such as opening an existing record or creating a related record.



Buttons can be reordered by dragging them. Click an existing button to edit or delete it.

The page also summarises role visibility, active status, assigned user, popup fields, linked-module mentions, and the internal description.

Edit a Configuration

Open the configuration detail page and click **Edit**.

The edit form contains the same sections as the creation form, pre-filled with the current values. You can change the assigned user, active status, role visibility, popup modules and fields, linked-module mentions, and internal description. The configuration number cannot be changed.

Use **Save** to confirm the changes or **Cancel** to return without saving.