

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.

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