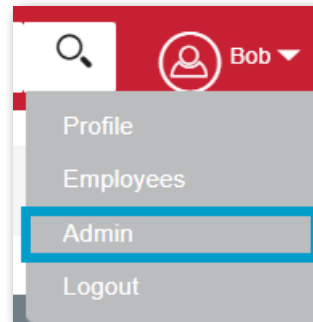


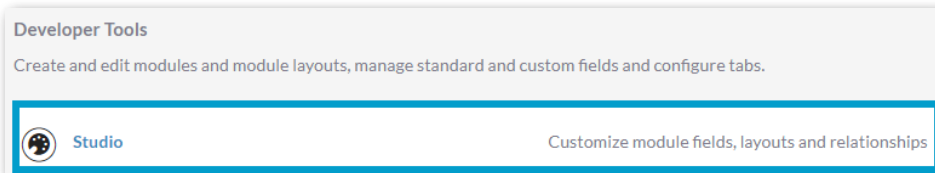
Visit support.fibrecrm.com for more info or contact your CRM Manager

Editing an Edit View Layout

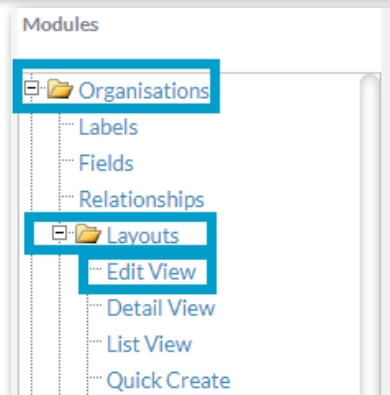
1. Editing an **Edit View Layout** in CRM lets you customise the layout of a module record and can choose what fields a user will see on that layout when in **Edit View** and also **Detail View**. To edit the **Edit View Layout**, navigate to your username in the top right hand corner and in the drop down list select **Admin**.



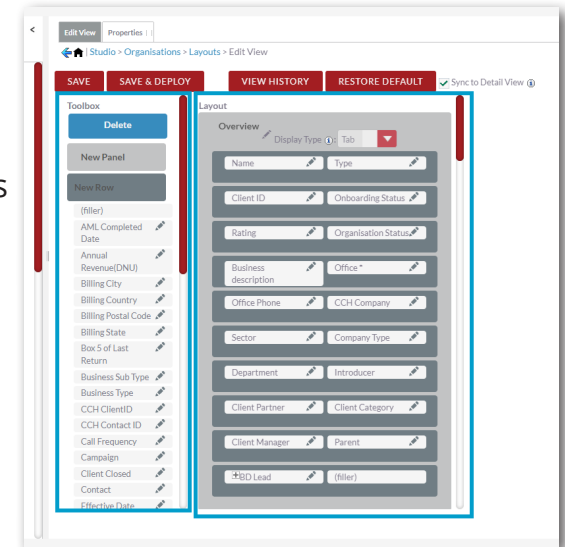
2. Scroll down to **Developer Tools** and then select **Studio**.



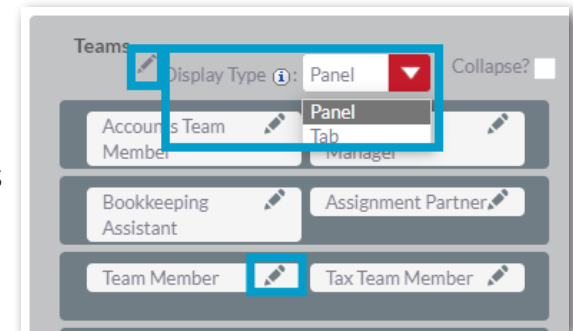
3. In the tree on the left hand side, select the module you'd like to edit the **List View** of such as **Organisations** or **People**. Then select **Layouts** and then **Edit View**.



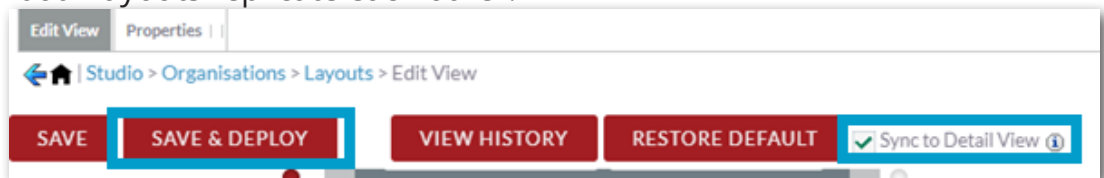
4. In the **Edit View** edit section the **Layout** area contains the fields that are currently displayed when the record of the module is in **Edit View**. The **Toolbox** contains layout elements such as the **Delete**, **New Panel** and **New Row** option. The **Toolbox** also contains the fields that can be added to the layout. Make changes to the layout by dragging and dropping elements and fields between the **Toolbox** and the **Layout** and within the **Layout** itself. To remove a field from the layout, drag and drop the field onto the **Delete** button. Once removed the field will be available in the **Toolbox** to re-add to the **Layout** if you'd like.



5. You can change a **Panel** to a **Tab** in the layout by using the **Display Type** drop down menu. When **Tab** is specified for a panel, subsequent panels set to display as **Panel** will be displayed within the tab. Use the **Pencil Icon** to change the name of a **Panel/Tab** or a **Field Label**.



6. If you select the **Sync to Detail View** tick box the **Edit View** will sync with **Detail View** meaning the panels, fields and field placements in both layouts replicate each other.



7. Once done select **Save & Deploy**. The layout will immediately be displayed in the module.