fibreCRM

HEART OF THE PRACTICE

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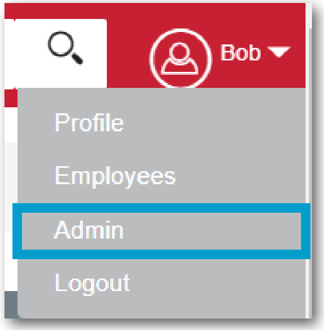
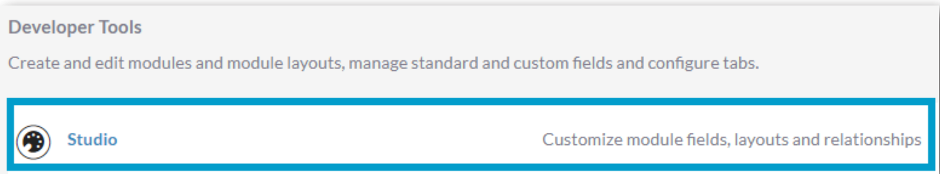
Edit the Quick Create View

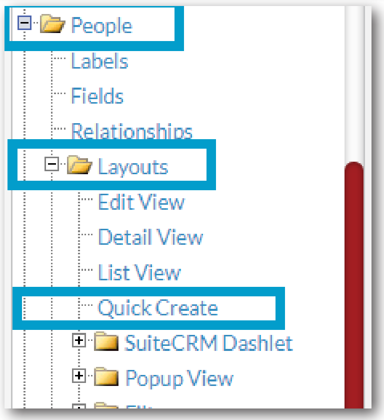
1. As an **Admin** of CRM you can select and edit the fields that are on a **Quick Create Form** that a user sees when creating a record from a subpanel such as a Person on the Involvements subpanel. To edit a **Quick Create Form Layout,** navigate to your username in the top right hand corner and in the drop down list select **Admin**.



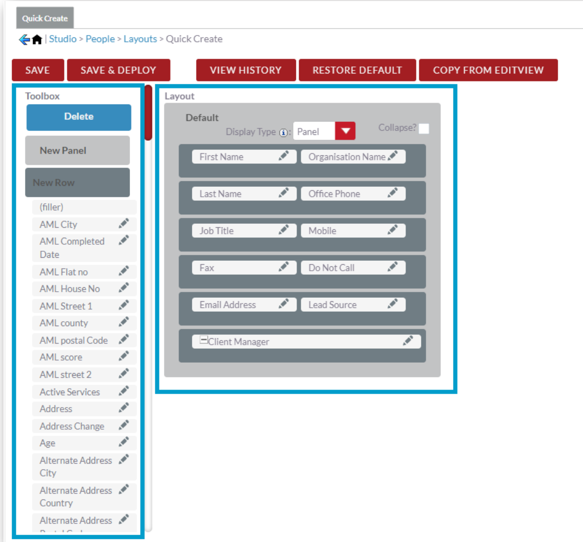
2. Scroll down to **Developer Tools** and then select **Studio**.



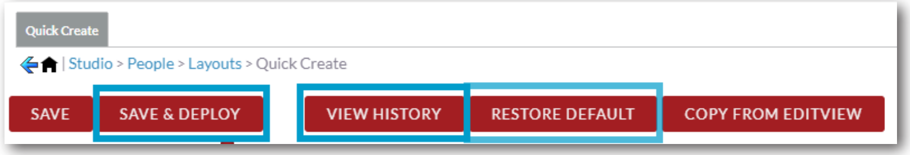
3. In the tree on the left hand side, select the module you'd like to edit the **List View** of such as **Organisations** or **People**. Then select **Layouts** and then **Quick Create**.



4. The **Layout** area contains fields that are currently displayed within the **Quick Create** form for that module. The **Toolbox** contains contains the fields that can be added to the layout. Make changes to the layout by dragging and dropping 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. ***Note: As it suppose to be a quick create view remember to not add too many fields on this screen, more information can be added later when editing the record.***



5. Select **Save & Deploy** to save all changes you made to the layout and to make the changes active in the module. The layout will immediately be displayed in the module. Click **View History** to view and restore a previously saved layout from the history and **Restore Default** to restore a view to its original layout.



6. Once you've **Saved & Deployed** your chosen quick create layout you'll be able to see the layout when quick creating a record for that chosen module.