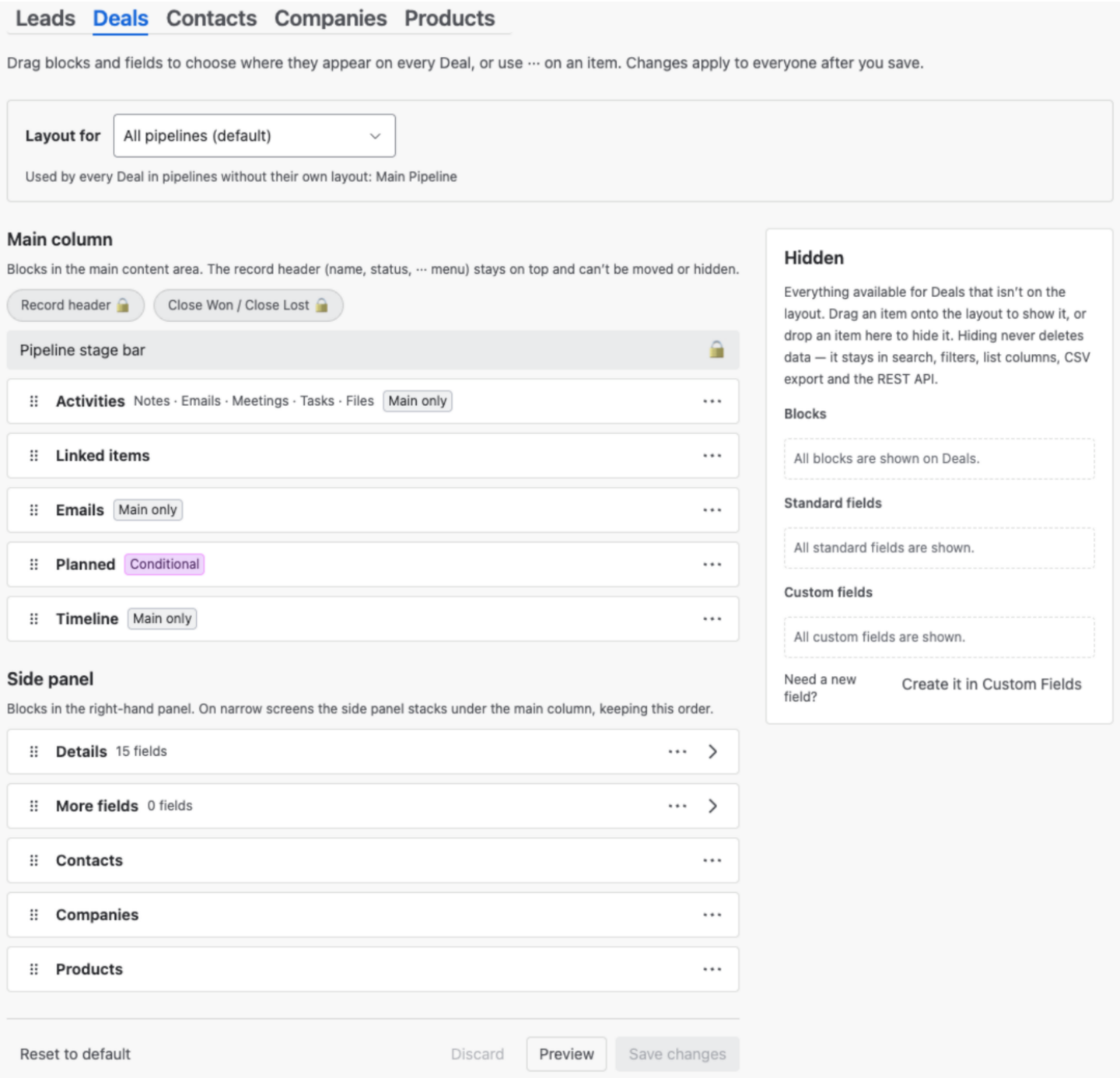
Layouts

Settings · https://mriacrm.com/docs/layouts/

Arrange what every record page shows

Settings → **Layouts** decides which blocks a record page shows, where they sit and in what order — and which fields the Details panel lists. There is one layout per record type, applied to everyone; Deals can also have a layout per pipeline.

Use it to put the information your team reads first at the top: move custom fields from the side panel into the main column, take away a block nobody uses, or start Timeline collapsed.



1. Who can change layouts

The Leads, Deals, Contacts, Companies and Products sub-tabs appear for users whose role has **Edit** on that record type's Configuration row in Roles & Permissions. Everyone else simply sees the result on every record.

2. The editor

Area	What it holds
Main column	Blocks in the main content area, top to bottom. The record header — name, status and the ⋯ menu — always stays on top.
Side panel	Blocks in the right-hand panel. On narrow screens the side panel stacks under the main column, keeping this order.
Hidden	Everything available for that record type that is not on the layout, grouped as Blocks, Standard fields and Custom fields.

Lozenges on a block tell you what it allows:

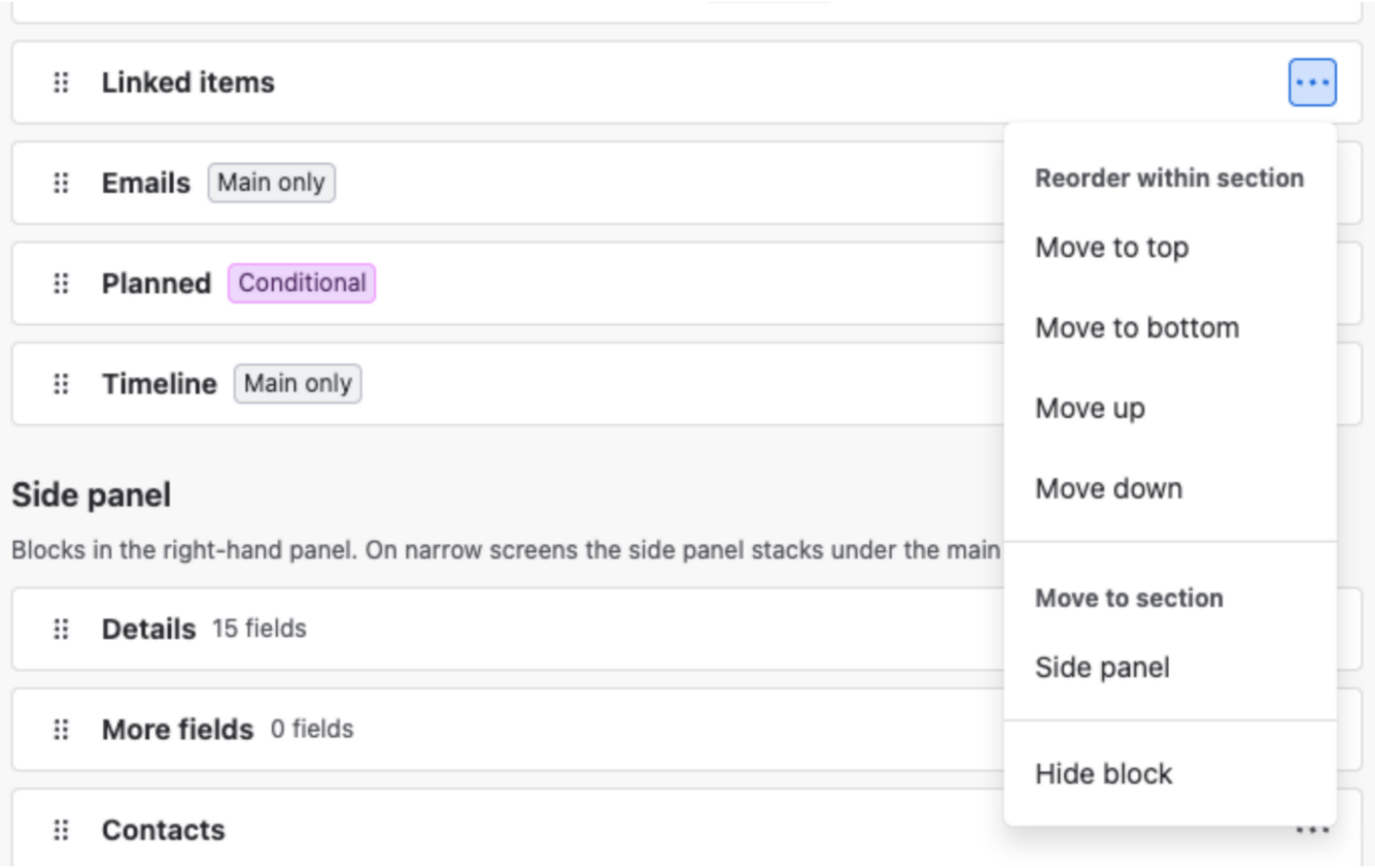
Mark	Meaning
Locked	Part of the page's frame: the record header, Close Won / Close Lost and the Pipeline stage bar. They cannot be moved or hidden.
Main only	Works only in the main column — Activities, Emails and Timeline. Moving one to the side panel is refused with the reason, for example *Timeline only works in the main column*.
Conditional	Shown on a record only when it has something to show. Planned appears when the record has an open Task or Meeting.

On a Deal, for example, the shipped layout is:

Main column	Side panel
Record header · Close Won / Close Lost · Pipeline stage bar · Activities (Notes, Emails, Meetings, Tasks, Files) · Linked items · Emails · Planned · Timeline	Details (15 fields) · More fields (your custom fields) · Contacts · Companies · Products

3. Moving and hiding blocks

Drag a block by its handle ⠿, or use its ⋯ menu, which does the same from the keyboard:



- **Reorder within section** — Move to top, Move to bottom, Move up, Move down.
- **Move to section** — from the main column to the side panel or back, where the block allows it.
- **Collapsed by default** — the block starts collapsed on every record. A user who expands or collapses it themselves keeps their own choice.
- **Hide block** — moves it to the Hidden panel. Drag it back, or use Show, to bring it back.

Hiding never deletes data

A hidden block or field is only taken off the record page. Its data stays in search, filters, list columns, CSV export and the REST API.

- **Activities is one block.** Hiding it removes the whole tab strip — Notes, Emails, Meetings, Tasks and Files, or on Products the Linked Deals, Leads, Companies and Contacts tabs — and the editor asks first, naming the tabs that go. Individual tabs can't be hidden separately.
- **The main column can't be empty.** Hide its last block and Save changes is disabled with *Main column is empty. A record page needs at least one block in Main*.

The Notes block

Leads, Deals, Contacts and Companies can show a **Notes** block that lists the record's notes on the page itself, instead of only in the Notes tab and the Timeline. It ships hidden on all four. To show it:

1. Open the record type's tab, find **Hidden** → **Blocks** → **Notes**, and click **Show** — or drag it into the main column.
2. Move it where you want it. It lands right under **Activities** and works in the main column only.
3. Click **Save changes**.

Hidden

Not on the layout. Drag an item in to show it, or here to hide it. Hidden data stays in search, filters, exports and the API.

Blocks

⠿ Notes Show

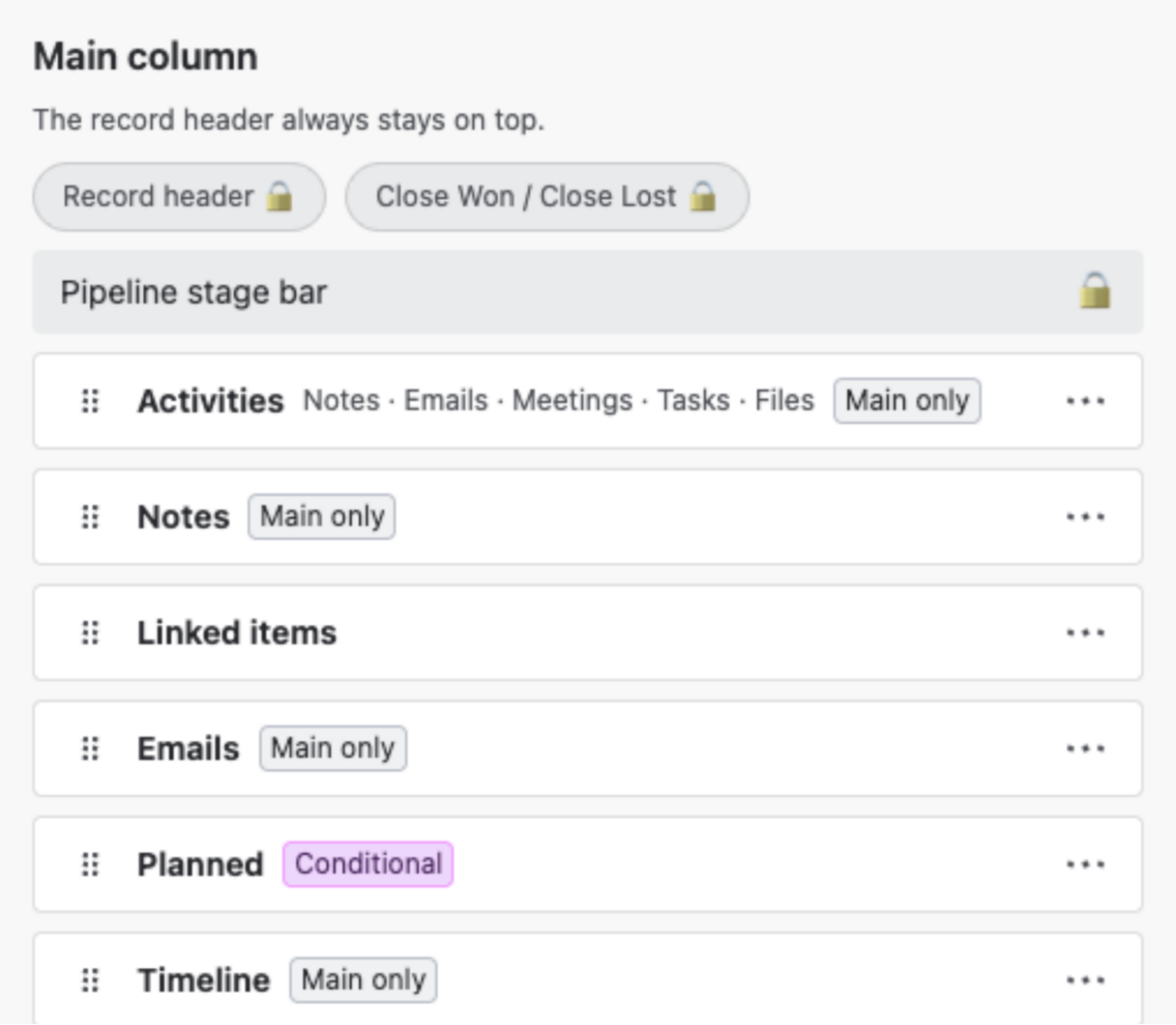
Standard fields

All standard fields are shown.

Custom fields

All custom fields are shown.

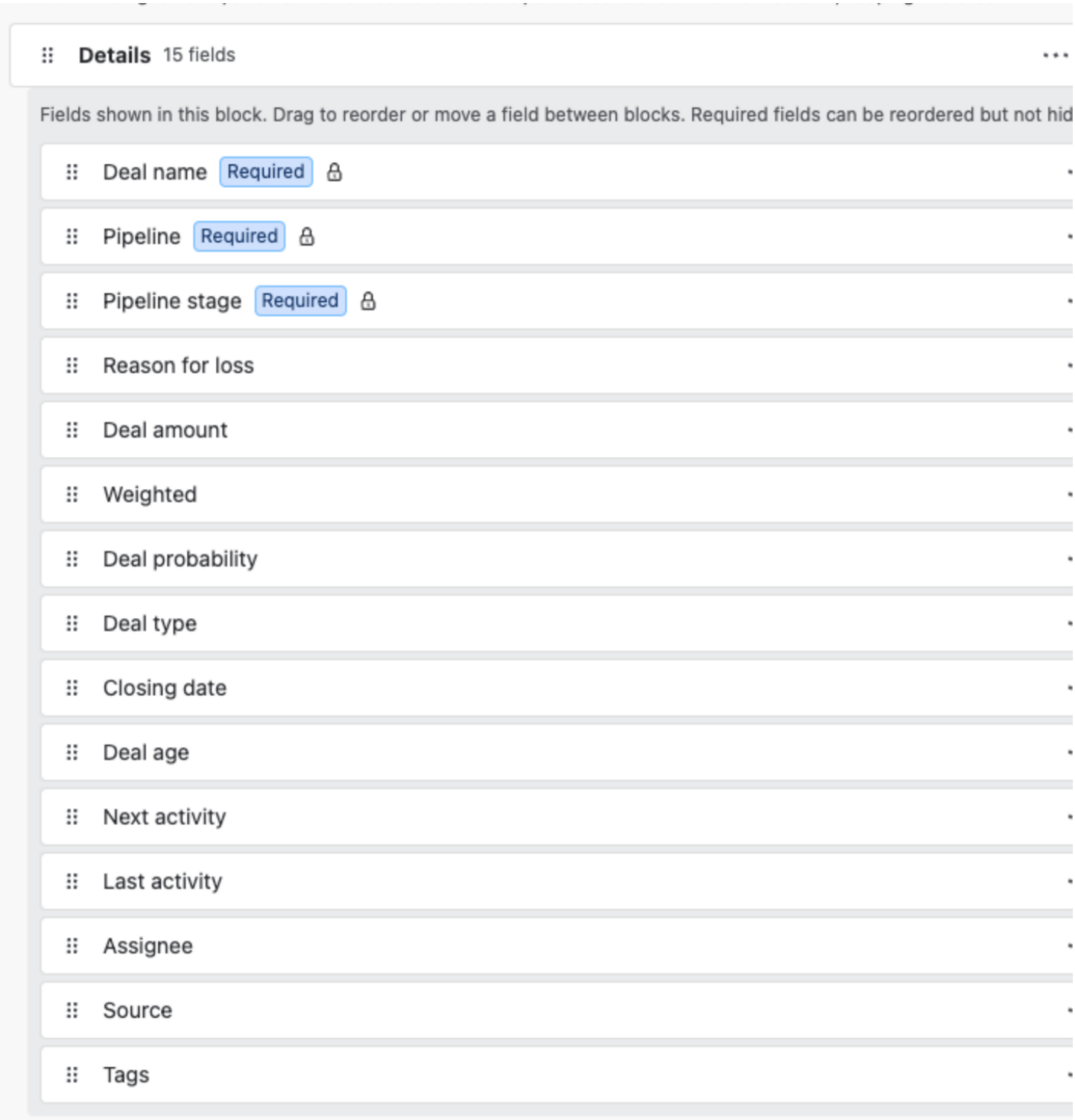
Need a new field? Create in Custom Fields



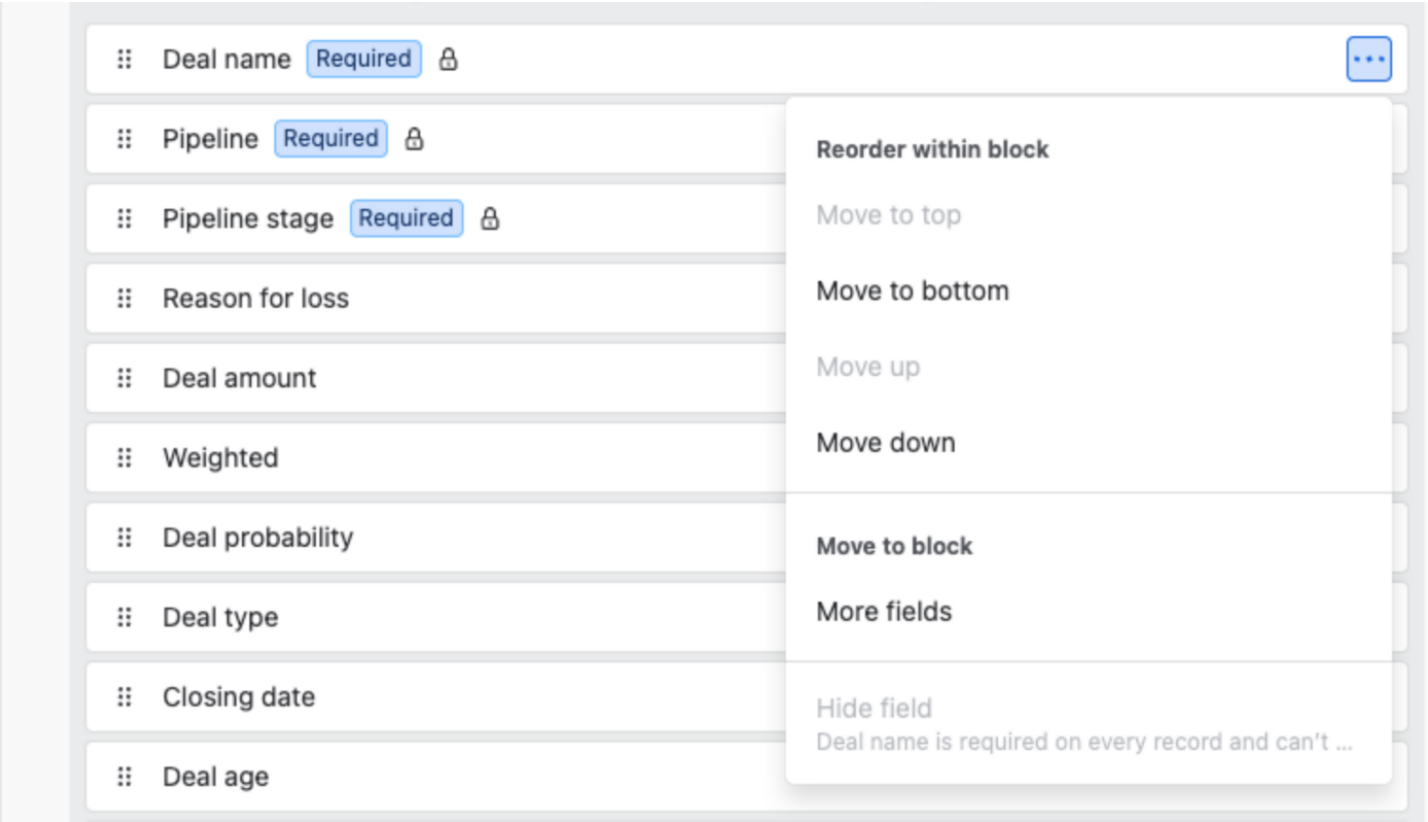
On the record, the block shows how many notes there are and each note with its author and time. Notes are still written and edited in the **Notes** tab of Activities — see Activities Breakdown.

4. Fields in Details and More fields

Details and More fields show a field count. Click the chevron to open the list: drag a field to reorder it, or move it between Details and More fields — a custom field placed in Details renders among the standard ones.



Fields every record must have — on a Deal, Deal name, Pipeline and Pipeline stage — carry a **Required** lozenge. They can be reordered but not hidden; the menu says why:



- Hidden fields go to the Hidden panel under Standard fields or Custom fields.
- A new custom field joins every layout automatically. To add one, create it in Custom Fields — the Hidden panel links there.
- On Products, the standard fields live together in Product information and stay there; custom fields move freely.

5. A layout per pipeline

On the Deals tab, **Layout for** picks what you are editing:

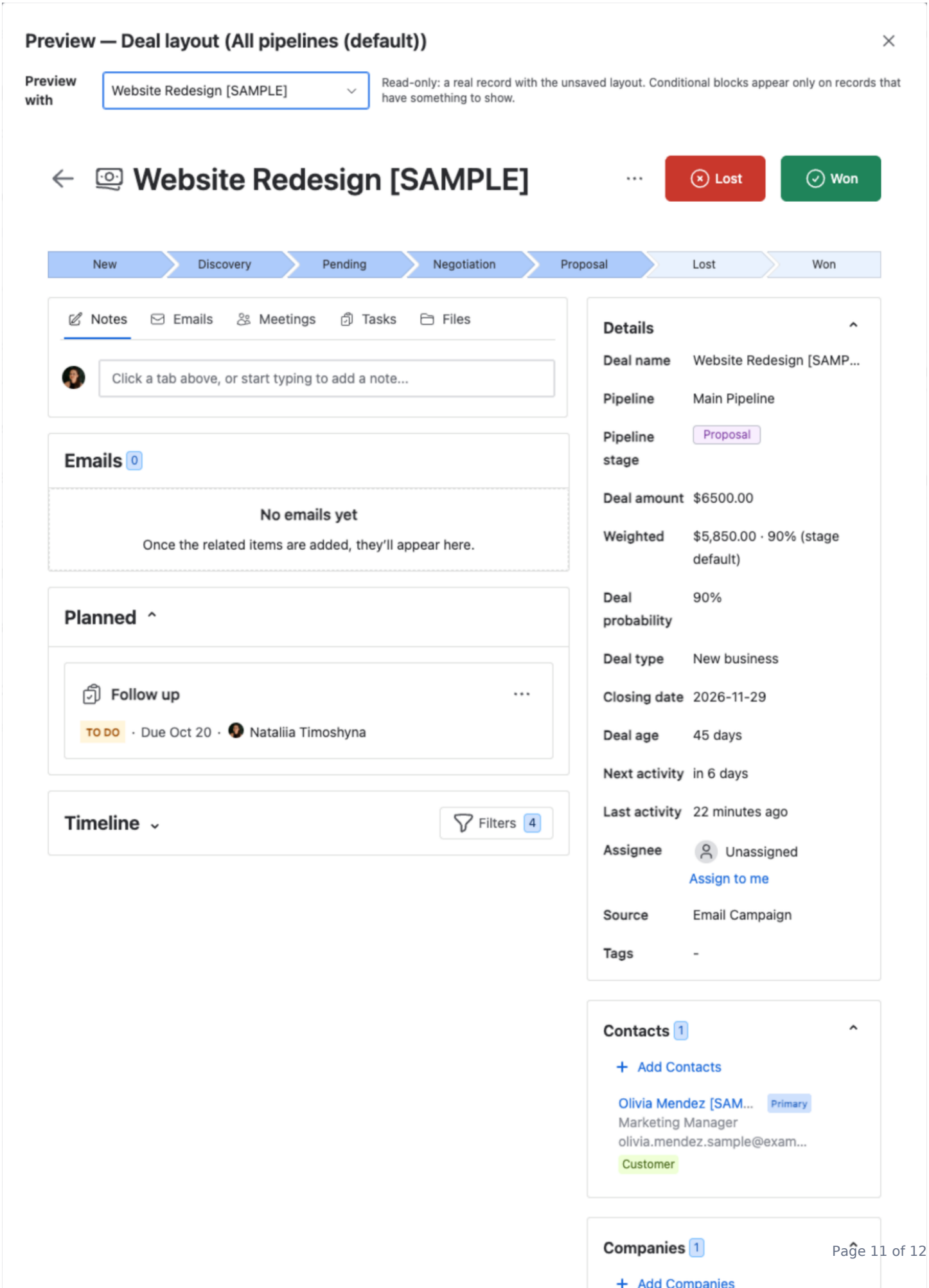
- **All pipelines (default)** — used by every Deal whose pipeline has no layout of its own. The line under the selector names those pipelines.
- **A pipeline** — save changes here and only that pipeline's Deals use the result. It drops off the default's list.

To go back, open the pipeline and choose **Follow 'All pipelines' layout**. The confirmation names the pipeline and says it applies immediately and can't be undone; unsaved changes in the editor are discarded.

6. Preview, save and reset

The footer holds **Reset to default**, **Discard**, **Preview** and **Save changes**. Discard and Save stay disabled until something changes.

- **Preview** shows a real record — pick it at the top — with your unsaved layout. It is read-only. Conditional blocks appear only on records that have something to show, exactly as on the record itself.
- **Save changes** applies the layout to everyone at once. The editor notes who saved last and when.
- **Reset to default** lists the shipped arrangement before you confirm: hidden blocks and fields become visible again and Collapsed by default is switched off. Nothing applies until you click Save changes, and users' own collapse choices are left alone.


Preview — Deal layout (All pipelines (default))
Preview with
Website Redesign [SAMPLE]
Read-only: a real record with the unsaved layout. Conditional blocks appear only on records that have something to show.
Website Redesign [SAMPLE]
Lost
Won
New
Discovery
Pending
Negotiation
Proposal
Lost
Won
Notes
Emails
Meetings
Tasks
Files
Click a tab above, or start typing to add a note...
Emails 0
No emails yet
Once the related items are added, they'll appear here.
Planned
Follow up
TO DO · Due Oct 20 · Nataliia Timoshyna
Timeline
Filters 4
Details
Deal name Website Redesign [SAMP...
Pipeline Main Pipeline
Pipeline stage Proposal
Deal amount $6500.00
Weighted $5,850.00 · 90% (stage default)
Deal probability 90%
Deal type New business
Closing date 2026-11-29
Deal age 45 days
Next activity in 6 days
Last activity 22 minutes ago
Assignee Unassigned
Assign to me
Source Email Campaign
Tags -
Contacts 1
Add Contacts
Olivia Mendez [SAM... Primary
Marketing Manager
olivia.mendez.sample@exam...
Customer
Companies 1
Add Companies

7. From a record

Users who can edit the layout see ⚙ **Configure** at the foot of a record's side panel, under Created and Updated. It opens the layout editor for that record type — on a Deal, with the Deal's pipeline already selected.

Related Pages

- Custom Fields — add the fields a layout places.
- Roles & Permissions — the Configuration rows that allow editing a layout.
- Pipelines Configuration — the pipelines a Deal layout can be set for.
- Activities — what the Activities and Planned blocks contain.