Managing Default Layouts

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Understand How Default and User-Specific Layouts Are Applied

In Pams, an application view can use one of two layout scopes:

- A **default layout**, maintained by an administrator, provides the starting view for users who do not have their own saved preferences.
- A **user-specific layout** preserves one person’s preferred way of viewing the same screen.

When someone opens a view, Pams first checks whether that person has a saved user-specific layout. If one exists, Pams displays it instead of the default layout. If no personal layout exists, Pams displays the assigned default layout.

This order is important when you update a shared view. Updating the default layout improves the starting experience for users without personal preferences, but it does not replace layouts that individual users have already saved.

A layout can control how information is presented in a view, including the fields shown, their order, and the active view settings.

Layout setting	What the user sees
Visible fields	Which information appears in the view
Field order	The left-to-right or displayed sequence of fields
Sorting	The order in which records are listed
Grouping	Records arranged into groups based on a selected field
Filters	Only records matching the selected filter conditions
Saved view presentation settings	The overall arrangement used when the view opens

For example, a default layout for a list of Sales Jobs may show **Sales Job Number**, **Client**, **Principal**, **Salesperson Responsible**, **Status**, and **Expected Order Date**. A sales manager may save a personal layout that also displays **Equivalent Booking** or **Margin**. Both layouts can exist for the same view without affecting each other.

As an administrator, maintain a useful shared default while respecting individual working preferences. Before changing the default, distinguish between settings that should be standard for everyone and settings that are only useful for a specific user or role.

[SCREENSHOT: A Pams application view showing the current fields, sorting, grouping, and filters alongside its layout management controls.]

Review the Current Layout Before Making Changes

Before you change a default layout, review the target view exactly as it is currently displayed. This helps you avoid removing useful fields, shared filters, or ordering that users depend on during daily work.

1. Sign in to Pams with the administrator permissions required to manage layouts for application views. If the layout management controls are not available in the view, do not make changes through another user’s layout; first confirm that you have the required access.
2. Open the specific view you want to standardize. For example, open the relevant list in **Sales Jobs**, **Products**, **Invoices**, **Payments**, **Contacts**, or another Pams area where users need a consistent view.
3. Open the layout management controls and check whether the displayed setup is the shared default layout or a user-specific layout. This distinction matters: editing a personal layout will not update what other users see, while editing the default affects users who do not have a personal layout.
4. Record the current presentation before editing. Check:
    - The visible fields
    - The field sequence
    - The current sort order
    - Any grouping
    - Any active filters
    - Any saved presentation settings that affect how the view opens
5. Review how different users work with the same view. A sales manager may need a different selection of fields from a salesperson, while a finance user may need invoice or payment fields that are not useful to the sales team. Do not remove a shared layout simply because it does not match one user’s daily work.

If the existing setup already meets the needs of a particular person but not the wider audience, preserve that arrangement as a user-specific layout. Use the default layout for the common view that should be available to everyone else.

[SCREENSHOT: A layout review showing visible fields, their sequence, active filters, sorting, and grouping before changes are made.]

Create or Update the Default Layout for a View

Use the default layout to give users a clear and consistent starting view when they open a Pams screen without personal layout preferences.

1. Open the target application view in Pams. Work from the exact screen you want to configure, such as a list of **Sales Jobs**, **Products**, **Invoices**, **Payments**, **Contacts**, or **Projects**. A layout saved from one view does not set the presentation for a different view.
2. Open the layout management controls for that view. Confirm that you are working with the default layout rather than an individual user's saved layout before changing any fields or view settings.
3. Select the fields that should appear in the shared view. Choose fields that support the common workflow for that audience. For example, a default Sales Jobs view may need identifiers, client information, responsible salesperson, status, and key dates. Avoid adding fields that only a small number of users need, as these can make the shared view harder to scan.
4. Arrange the selected fields in a practical order. Place the most frequently checked information first. Keep identifying information, such as a job number or account name, close to related status, responsibility, and date fields.
5. Set the sorting, grouping, and filters that users should receive by default. Use shared filters only when they are appropriate for the whole intended audience. A restrictive filter can make users think records are missing when they are simply excluded from the default view.
6. Click **Save** to store the configuration as the default layout. Review the saved layout to confirm that it is marked as the layout used for users without user-specific overrides.

The default layout should make routine work easier without limiting users who need a different perspective. Personal layouts remain available for users who need extra fields, alternate sorting, or role-specific filtering.

Assign the Default Layout to the Appropriate Users

After you save the default layout, assign it to the people who should receive that shared view. Assignment determines who sees the layout when they do not have a user-specific layout of their own.

1. From the target view's layout management controls, open the layout assignment options. Select the default layout you reviewed and saved for this view.
2. Choose the intended audience. Depending on the view and its purpose, the layout may apply to all users of that view or to a defined group of users who share the same working needs. Use the audience that matches the fields, filters, sorting, and grouping you configured.
3. Review the selected layout before saving the assignment. Check that the displayed configuration contains the correct:
    - Visible fields
    - Field order
    - Sorting
    - Grouping
    - Filters
4. Click **Save** to store the assignment. Reopen the view, or ask a user without a personal layout to reopen it, to confirm that the shared layout is displayed.
5. If the audience includes people with different responsibilities, keep the default layout focused on common information. For example, a shared view can show the key record number, account, owner, status, and date fields, while specialist users retain their own layouts for detailed operational or financial fields.

Changing an assigned default layout affects only users who rely on that default. A user who has saved a personal layout continues to see their own fields, ordering, filters, sorting, and grouping. This is expected behavior, not a failed assignment.

For that reason, communicate significant shared-view changes to the affected audience. If users report that they do not see the new default, first check whether they have a user-specific layout before changing the shared assignment again.

[SCREENSHOT: Layout assignment controls showing a selected default layout and the intended user audience.]

Manage User-Specific Layouts Without Changing the Shared Default

A user-specific layout allows one person to work with a view that suits their role without changing the shared default for everyone else. It is useful when the user needs different fields, a different field order, or a different way of sorting, grouping, or filtering records.

1. Open the same Pams application view that the user needs to personalize. Start from the view where the user performs their work, such as **Sales Jobs**, **Invoices**, **Payments**, **Products**, or **Contacts**.

2. Set up the view for that person's needs. Add the fields they regularly review, arrange them in a useful order, and apply the sorting, grouping, or filters that help them find the right records.

3. Save the configuration as a user-specific layout. This creates a personal override for that user. It does not edit the administrator-managed default layout, and it does not change what other users see.

4. Use a separate user-specific layout when a role needs extra information but the shared view should remain simple. For example:

   - A sales manager may need **Equivalent Booking**, **Margin**, and **Salesperson Responsible**.
   - A user following invoices may need **Invoice Number**, **Invoice Amount**, **Due Date**, and **Paid**.
   - A user handling delivery coordination may need delivery dates, shipping details, and current status fields.

5. When the personal layout is no longer needed, use the available reset or remove option for that user-specific layout. After it is removed, reopen the view. The user returns to the currently assigned default layout for that view.

Do not solve an individual request by repeatedly changing the shared default. A default layout should serve the common audience; a personal layout should support an exception. Keeping those two purposes separate prevents unnecessary changes for other Pams users.

Verify Layout Changes and Resolve Layout Conflicts

Verify every default-layout change from the perspective of both a user who relies on the shared layout and a user who has saved personal preferences. This confirms that the layout assignment works as intended and helps you identify overrides quickly.

1. Open the target Pams view using an account that has no user-specific layout for that view. Check that the assigned default layout displays the expected fields, field order, filters, sorting, and grouping.
2. Compare the displayed view against the layout you saved. Confirm that important fields are visible and that the shared filter does not hide records users should normally see.
3. Check the same view for a user who has a user-specific layout. That user may continue to see an earlier arrangement. This is expected because the personal layout takes priority over the default layout.
4. If a user does not see the updated default layout, open the layout management controls and check whether a user-specific layout is saved for that person. Remove or reset the personal layout only when the user should return to the shared view.
5. If the wrong configuration appears for everyone, confirm that you saved and assigned the layout from the intended application view. A layout configured in one view does not apply to a different Pams view.

What you see	Likely reason	What to do
One user sees an older arrangement	The user has a saved personal layout	Review, reset, or remove the user-specific layout
Users see unexpected fields or filters	The wrong default layout was saved or assigned	Reopen the intended view and review the saved default
Users cannot find expected records	A shared filter is limiting the view	Review the default filter and update it if necessary
The new layout does not appear	The view has not been reopened after saving	Reopen the view and check the assigned layout again

Use the reset or remove option carefully. Removing a user-specific layout restores the assigned default and may remove the user’s preferred fields, filters, and ordering.

Overview

Default layouts help administrators keep commonly used Pams views clear and consistent across a sales operation. They are especially useful where several users work from the same records but need an agreed starting point, such as **Sales Jobs**, **Products**, **Contacts**, **Invoices**, **Payments**, or **Projects**.

The default layout controls the shared presentation for users who have not saved personal preferences. It can define which fields are visible, where those fields appear, how records are sorted, whether records are grouped, and which filters are active when the view opens. This allows an administrator to present the information that supports the normal workflow without requiring every user to build a view from scratch.

User-specific layouts provide the necessary flexibility for role-based work. A salesperson may focus on **Client**, **Principal**, **Offer Status**, and **Expected Order Date**. A manager may need **Equivalent Booking**, **Target**, or responsibility fields. A finance user may focus on invoice amounts, due dates, and payment status. Each person can retain a suitable view without changing the shared default.

The key operational rule is simple: a user-specific layout takes priority over the assigned default layout. Therefore, a change to the shared default will not automatically change an individual user's saved view. Administrators should treat this as a deliberate protection for personal working preferences.

Default layouts are separate from the CRM connection settings covered in Configuring CRM Integrations. Use the integration settings to manage connected CRM information, and use layout settings to control how users view records inside Pams.

A well-managed default layout reduces unnecessary searching, makes shared lists easier to review, and provides a dependable starting view while still allowing individual users to work with the information most relevant to their responsibilities.

Prerequisites

Prepare the target view and its intended audience before you change a default layout in Pams. The following items help ensure that the shared layout supports the right workflow and does not unintentionally replace a useful personal arrangement.

- Sign in with administrator permissions that allow you to open the layout management controls for the relevant Pams view. Confirm access before planning changes.
- Identify the exact view you want to configure. For example, decide whether you are updating a view in **Sales Jobs**, **Products**, **Invoices**, **Payments**, **Contacts**, or **Projects**. Layout settings belong to the view where they are saved.

- Know which users should receive the default layout. Decide whether it is suitable for all users of the view or only for the intended user audience.
- Review the current default layout and note the existing visible fields, field order, filters, sorting, and grouping. This gives you a clear comparison point if users report that a field or record is no longer visible after the update.
- Identify any users who rely on a personal layout for the same view. Their layouts are not automatically replaced by a default-layout change, but knowing who has a personal setup helps you explain different results during verification.
- Decide which information belongs in the shared view. Include fields needed for the normal workflow and avoid role-specific fields unless they are useful to the entire audience.
- Have an account, or access to a user, with no user-specific layout for the target view. You need this to confirm that the assigned default layout appears correctly after saving.
- Be ready to test the view after assignment. Check the expected fields, sequence, sort order, grouping, and filters rather than relying only on the configuration you selected.

After confirming the shared layout works as intended, continue with Managing Demo and Subscription Data to manage the demo and subscription information available in Pams.