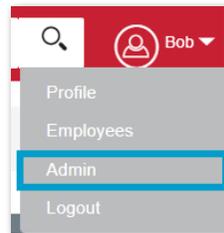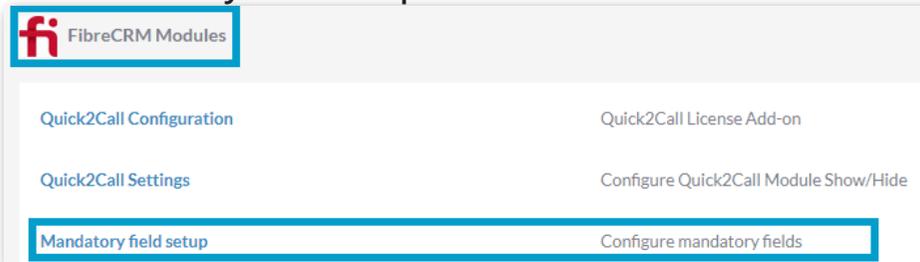# fibreCRM

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Visit **support.fibrecrm.com** for more info or contact your CRM Manager
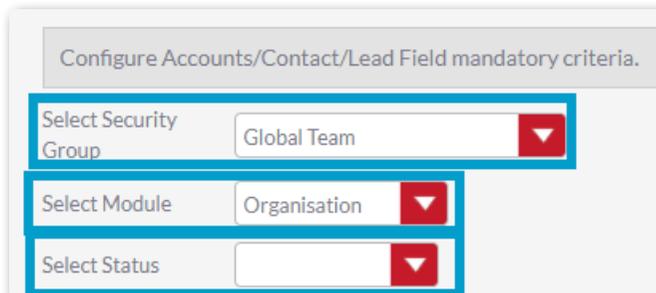
Setting Mandatory Fields

1. To set a **Mandatory Field** first navigate to your username in the top right hand corner and select **Admin**.

**2.** Scroll down to **FibreCRM Modules** and then select **Mandatory Field Setup**.

3. In the **Select Security Group** dropdown you can select which security group the **Mandatory Fields** will apply to. In **Select Module**, **Mandatory Fields** will apply to the specific module you select and in **Select Status, Mandatory Fields** will apply to only the record at that status type.

4. In the **Select Field** section choose the **Mandatory Field** from the dropdown menu. You can add as many fields as you want using the **Add More Fields** button. From the **Match** column you can select if just that field is mandatory. If you select **Any One Mandatory, Any Two Mandatory** or **Any Three Mandatory** from the drop down you will then select field options from the **Optional Mandatory Fields** list. This means that fields become **Either/Or** for example you have to fill in either the Office Phone or Mobile. Once you've filled in all that you require click **Save**. Fields that are mandatory will be seen as yellow on the record screens. To remove a Mandatory Field click on the red **X** button on the right handside.
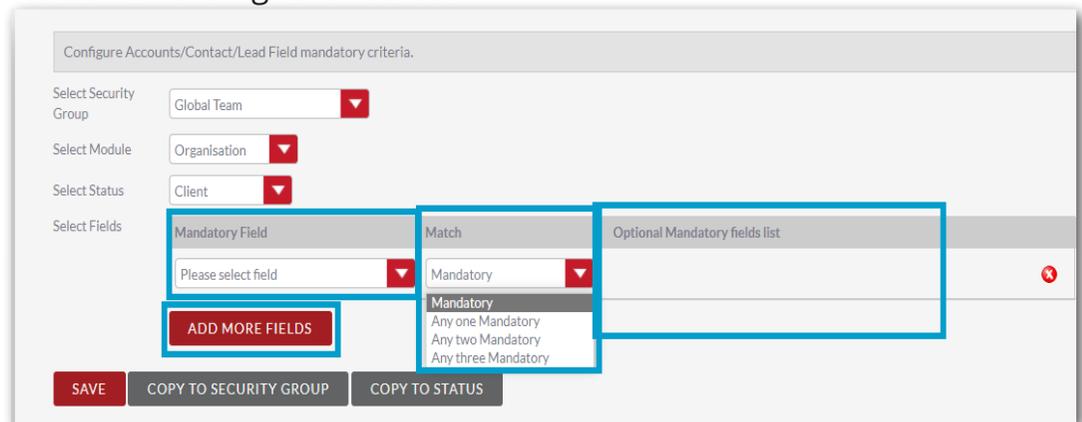
5. If you select **Copy to Security Group** it will copy everything that been set such as **Status/Module** and **Mandatory Field** to another **Security Group**. In the pop up box select which security group you'd like to copy to and the select **Copy**.
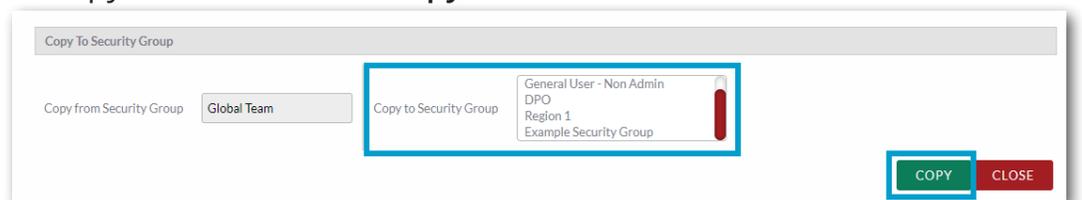
6. In **Copy to Status** you can copy the mandatory fields to a new Status of a record. Select the **Status** and click **Copy**.