fibrecrm HEART OF THE PRACTICE

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

Setting Mandatory Fields

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

0	Bob 🕶			
Profil				
Employees				
Admi	n			
Logo	ut			

Conv from Status

Client

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

Quick2Call Configuration	Quick2Call License Add-on
Quick2Call Settings	Configure Quick2Call Module Show/Hide
Mandatory field setup	Configure mandatory fields

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.

Configure Acco	unts/Contact/Lea	ad Field ma	andatory cr	iteria.
Select Security Group	Global Team			
Select Module	Organisation			
Select Status				

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.

Select Security Group	Global Team			
Select Module	Organisation			
Select Status	Client			_
Select Fields	Mandatory Field	Match	Optional Mandatory fields list	
	Please select field	Mandatory	(
	ADD MORE FIELDS	Mandatory Any one Mandatory Any two Mandatory Any three Mandatory		

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**.

Copy To Security Group					
Copy from Security Group	Global Team	Copy to Security Group	General User - Non Admin DPO Region 1 Example Security Group		
				COPY CLOS	SE

In **Copy to Status** you can copy the mandatory fields to a new • Status of a record. Select the **Status** and click **Copy**.

