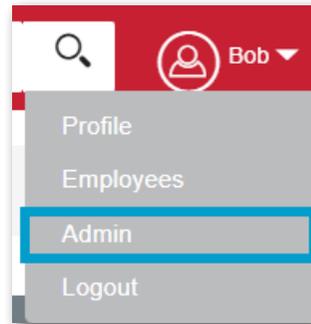# fibreCRM

HEART OF THE PRACTICE

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

Read Only Fields

1. In CRM you can set fields in **Leads**, **Organisations**, **People**, **Opportunity** and **User** records to read only. To set read only fields first navigate to your username in top right hand corner and in the drop down list select **Admin**.


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


3. Select a **Security Group** for who this will apply to and in the **Select Module** section choose the Module you'd like from the drop down menu.
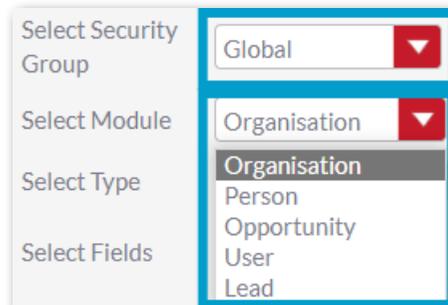
4. In the **Select Status/Type** section you can choose a status or type of a record such as one of the **Client Types** in **Organisations** and **People**, a **Lead** status or a **Sales Stage** in **Opportunities**. This will make the read only fields selected read only if the record is set at the selected status/type.
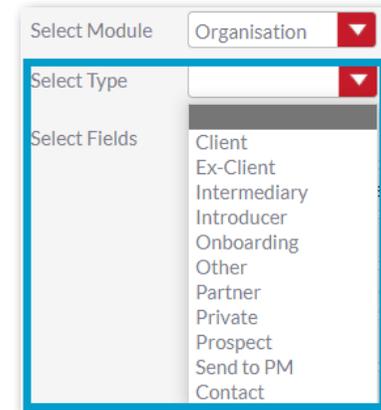
5. To make fields read only in the **Select Fields** section drag and drop the fields you would like into the **Read Only Fields** section. Once you've selected all the fields you would like click **Save**.
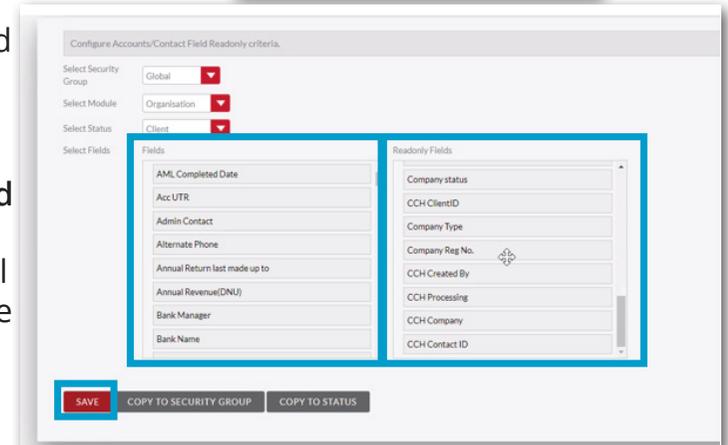
6. A pop up box will appear letting you know that saving the changes will overwrite any current field selections for the status. Click **OK**.

7. Once saved the fields have selected to **Read Only** will be greyed out when the record is in **Edit** view.