fibrecrm OF THE PRACTIC

HEART PRACTICE

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

Read Only Fields

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.

0	Bob 🕶
Profil	
Empl	oyees
Admi	n
Logo	ut

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

Survey Options Readonly field setup Two Factor Authentication Settings	Set Si Confi Two F	urvey logo and colour scheme gure Readonly fields Factor Authentication Settings	A pop up box letting you ki saving the change overwrite any cur	will appe now that es will rent field	ear demo.fibrecrn This will overwri	 cloud says te any current field s 	elections for this status
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.	Select Security Group Select Module Select Type Select Fields	Global Organisation Organisation Person Opportunity User Lead	Selections for the OK. Once saved the fields have selected to Read Only will be greyed out when the record is in Edit view.	status. Cl Verview Address Name:* Clent D: Primary Contact: Office Phone: Website: Business Description: Client Partner: Client Manager:	ICK Traine Marketine Keep in Touch Associated British Ports Corro Abbins Van Arsdale Corro Sole trade Corristian Putiman EG CANCE SAVE AND CONTINUE	Dates Financials Image: Imag	Client Cl

In the Select Status/Type 4. 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
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.

Select Type	_
Select Fields	Client
	Ex-Client
	Intermediary
	Introducer
	Onboarding
	Other
	Partner
	Privale
	Send to DM
	Contact

elect Security Group	Global				
ect Module	Organisation				
elect Status	Client				
Select Fields	Fields Readonly Fields				
	AML Completed Date	Company status	-		
	Acc UTR	CCH ClientID			
	Admin Contact	Company Type			
	Alternate Phone	Company Reg No. Sto			
	Annual Return last made up to	CCH Created By			
	Annual Revenue(DNU)	CCH Processing			
	Bank Manager	CCH Company			
	Bank Name	CCH Contact ID			

Cancel

 \mathbf{T}