# **Setting Field Visibility for Different Person Types**

14 Steps <u>View most recent version</u>

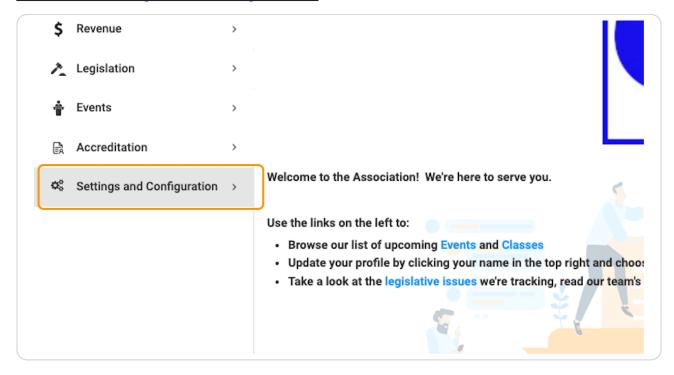
Created by Creation Date Last Updated

Engagifii Inc. October 4, 2023 October 4, 2023



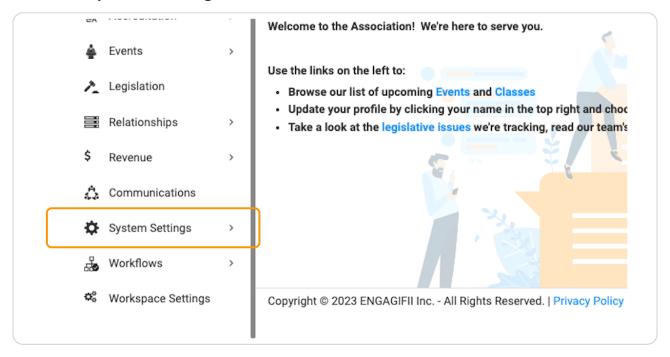


# **Click on Settings and Configuration**



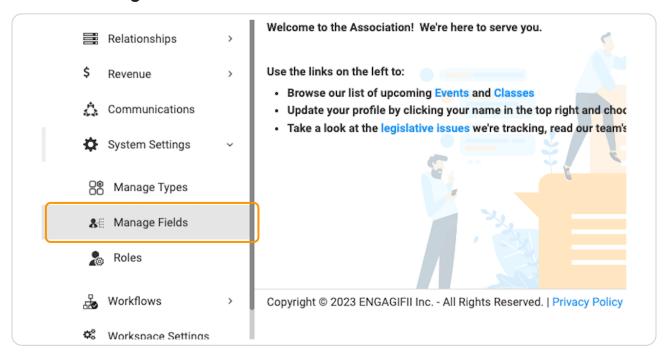
STEP 2

## **Click on System Settings**

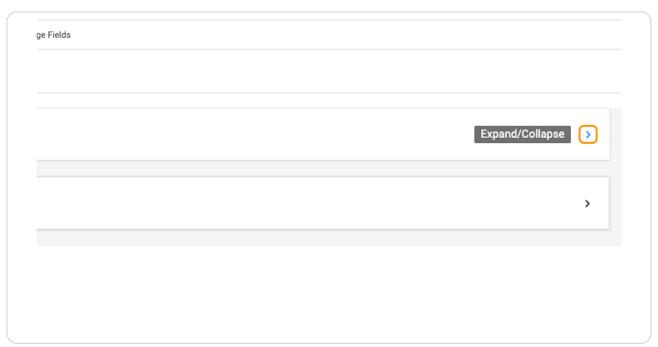


STEP 3

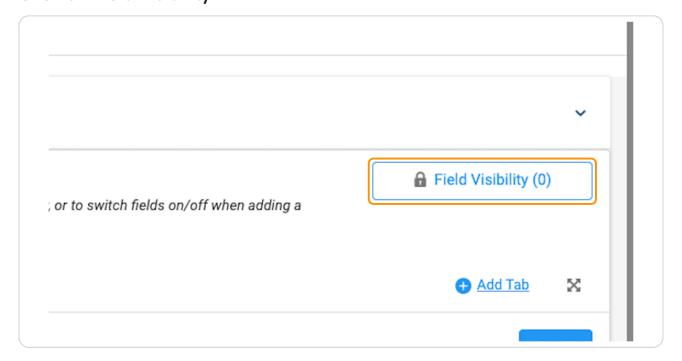
Click on Manage Fields



# Click to expand

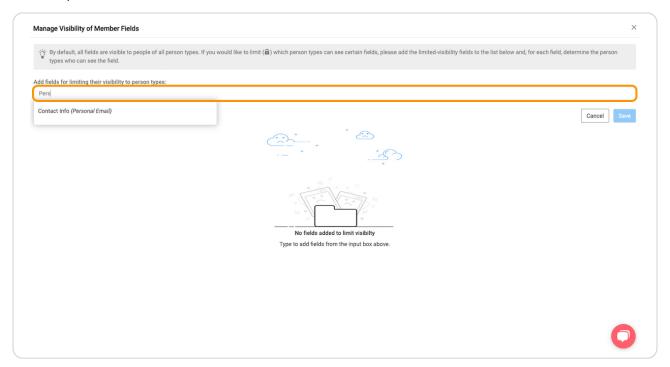


# STEP 5 Click on Field Visibility



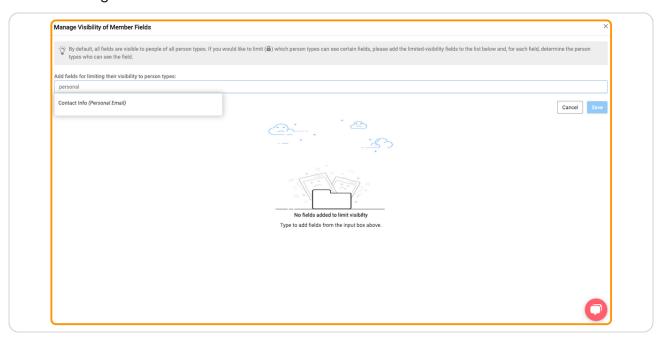
# Search the field you would like to set visibility for

I would like to change the visibility of personal email to staff only. So I am searching the field " "personal email."

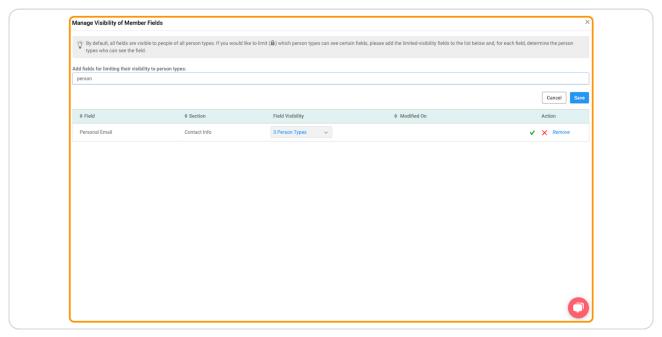


# Select the field you would like to change

I am selecting "Personal Email"

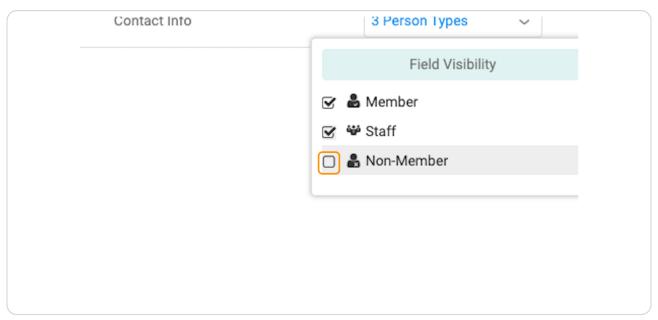


# STEP 8 Click on Manage Visibility of Member Fields...



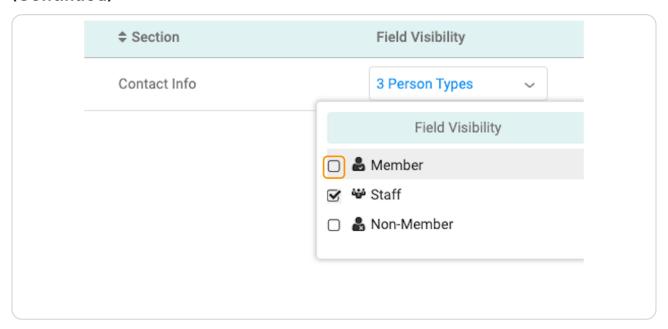
# Make sure the selected person types are who you would like to have viewing access to this field.

I only want staff to view the "Personal Email" so I am deselecting the person type "Non-Member" and "Member"

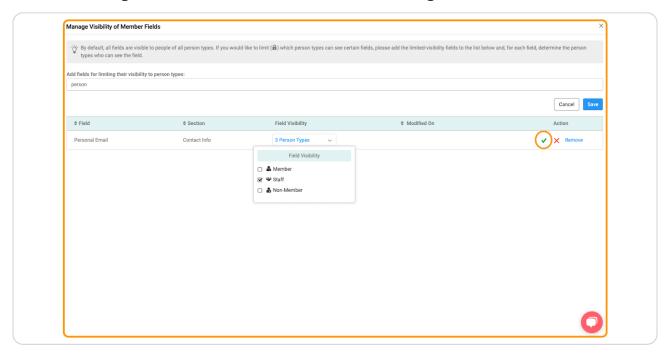


#### **STEP 10**

### (Continued)

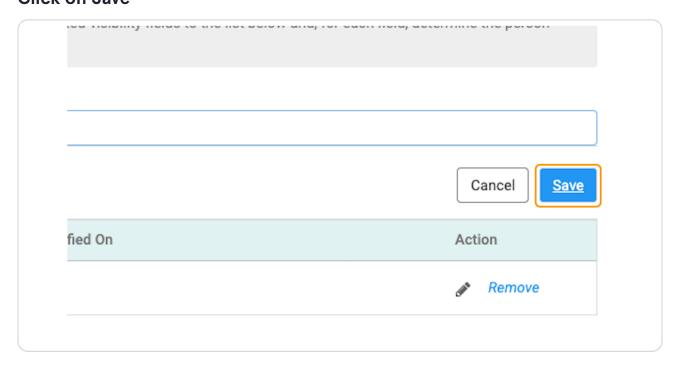


# Click on the green check mark to save the setting on that field.

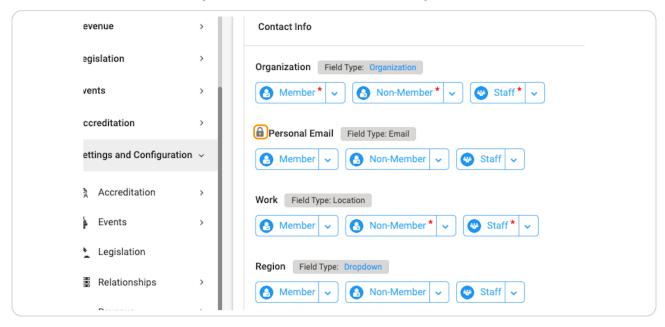


#### **STEP 12**

#### Click on Save



### Note: The lock icon represents that field visibility is set on that field



#### **STEP 14**

Note: The red \* on Person type button represents that the field is mandatory for that person type. If a field is marked as Mandatory for a person type in the original field management setting, you would not be able to remove field visibility.

