fibreCRM | HEART OF THE PRACTICE

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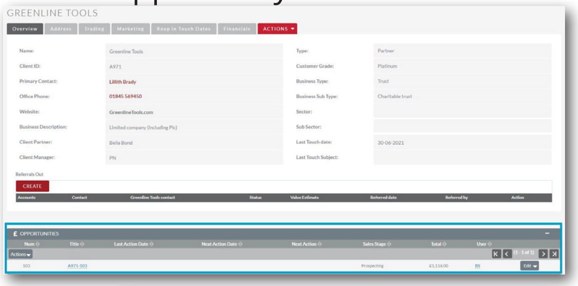
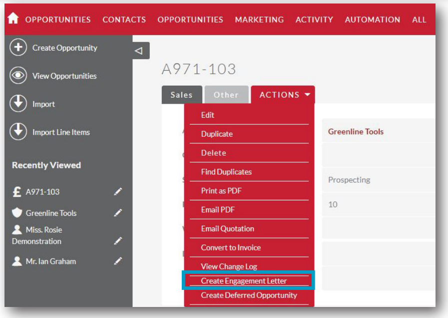
Creating and Sending an Engagement Letter

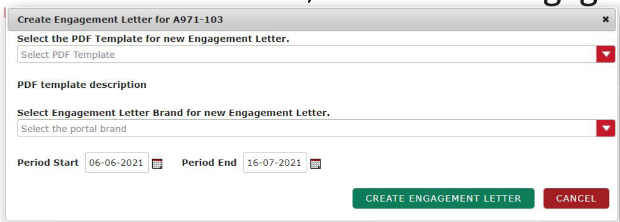
1. To create an **Engagement Letter** navigate to the **Person** or **Organisation** record the opportunity is related to and then scroll down to the **Opportunity Subpanel** and select the Opportunity. Or by finding the Opportunity in the Opportunities module.



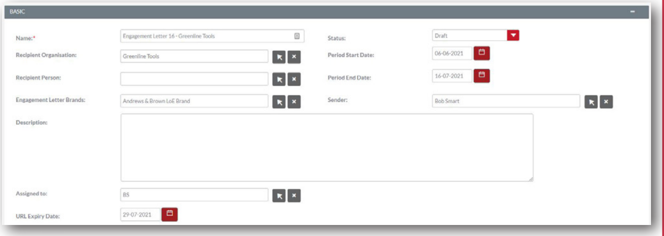
2. Select the **Create Engagement Letter** option from the **Actions Menu** on the top bar of the **Opportunity** record.



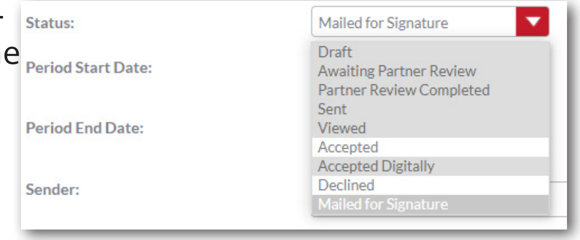
3. Select the correct template and branding from the drop down menus. You will need to also enter a **Period Start** and **Period End**. Once selected, click **Create Engagement Letter**



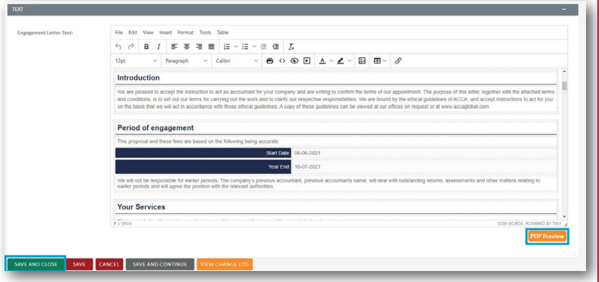
4. Select the **Edit** option from the **Actions Menu** to modify any information or make changes to the Engagement Letter template.



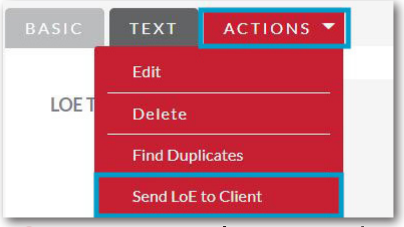
5. The dropdown menu in **Status** shows the lifecycle stages of the Engagement Letter. The status will automatically default to **draft** when the Engagement Letter is created. When you select a stage in the status you'll only be given options for the next stage of the Letters lifecycle. For example; if you select **Mailed For Signature** you'll only be then able to change the status to **Accepted** or **Declined**.

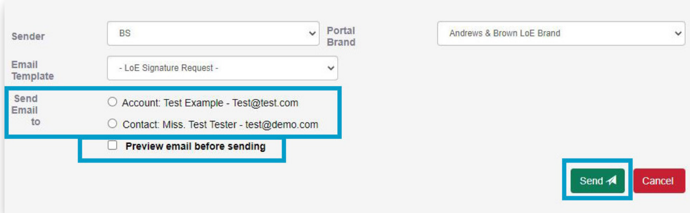


6. To preview the Engagement Letter select **PDF Preview and Save and Close** when finished.



7. When you're ready to send, use the **Send LOE to Client** option in the **Actions Menu**. Select whether the recipient is the **Organisation** or **Person** record related to the Opportunity. Tick the **Preview Email Before Sending** box to make sure the email template is correct. When you're happy with everything click **Send**.





8. You can also view the status of the letter by looking at the **Engagement Letter Log** in the Engagement Letter record, which will show you if a client has viewed or signed the letter.