fibre CRM

HEART OF THE PRACTICE

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Creating and Sending an Engagement Letter

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.

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

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			Create Engagement Letter	
			Create Deferred Opportunity	

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**

Create Engagement Letter for A971-103				
Select the PDF Template for n	ew Engagement Letter.			
Select PDF Template				
PDF template description				
Select Engagement Letter Bra Select the portal brand	nd for new Engagement Letter.			

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

Name.*	Engagement Letter 16 - Greenline Tools	0	Status:	Draft	
Recipient Organisation:	Greeniine Yools		Period End Date:	16-07-2021	
Engagement Letter Brands:	Andrews & Brown LoE Brand	R ×	Sender:	Bob Smart	R ×
Description					
Assigned to:	85	K ×			
	29.07.0021				

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.

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Mailed for Signature

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.

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	LOE T	Edit 	Template Send Email	Account: Test Example - Test@test.com		
.		Find Duplicates		Preview email before sending		
		Send LoE to Client				Send A

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.