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Sending a Client Information Request

1. Go to the **Person** record you want to send the request to. In the record select the **Actions Menu** and choose **Client Information Request**. The Client Information Request allows you to request information from the client via the **Client Portal**.



2. Select the template you want to use and select **Load Template**, the form will then open. The **Current** column is information you already have in the CRM. Use the tick boxes in the **Mandatory** column if definitely required. Once happy with form select **Invite Client to Portal**.

Request Client Information - Miss. Hannah Hough

Individual Only LOAD TEMPLATE

INVITE CLIENT TO PORTAL

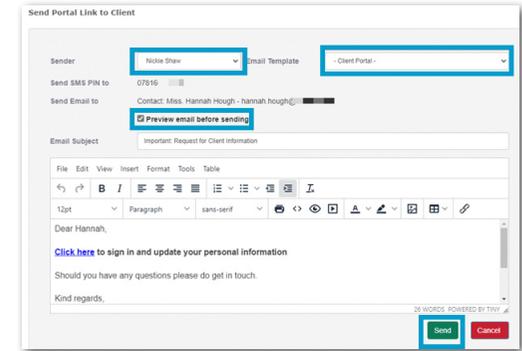
Contact Information

Field	Mandatory	Current
<input checked="" type="checkbox"/> First Name	<input type="checkbox"/>	Hannah
<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/>	Hough
<input checked="" type="checkbox"/> Mobile	<input type="checkbox"/>	07816090186

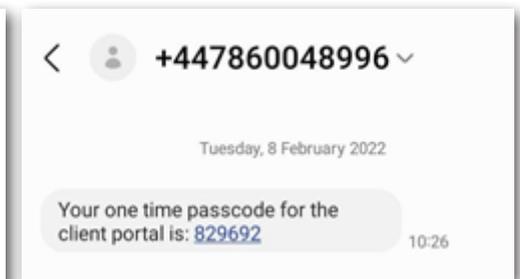
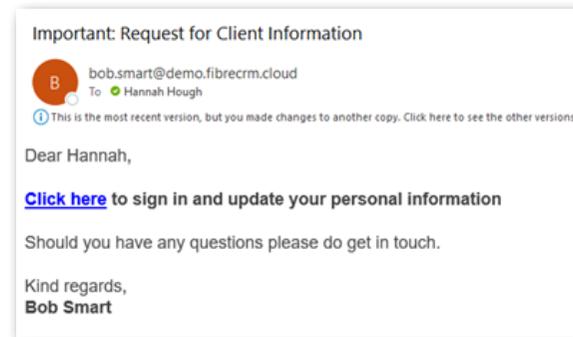
Address

Field	Mandatory	Current
<input checked="" type="checkbox"/> Address	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> County	<input type="checkbox"/>	

3. In **Send Portal Link to Client** box you can select the **Sender** and **Email Template**. You can view the email before you send by tick the **Preview Email Before Sending** box. Once done click **Send**.



4. Your client is then sent an email with a link inviting them to the portal and a passcode sent via SMS.



5. Once they click on the link in the email they are taken to the **Client Portal Web Page** to create a password and enter their SMS code. Once done they will be able to **Login**.

andrews & brown
CHARTERED ACCOUNTANTS

Please set a password to continue

Enter new password (required)

Repeat password (required)

SMS Code (required)

Save

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6. In the **Client Portal** they can enter all the required information. The fields you made mandatory will be marked with an **Asterisk**, and they will be required to populate before they can submit the form. They also will need to tick the box which gives their consent to the information being sent. Once done they can click **Submit**.

7. Once the form has been completed a green **Viewed Returned Information** button will appear on the clients record and a workflow will notify you via email that your client has submitted data.

8. It will then let you review the information that was entered, new information will be highlighted in **Green**. You can untick any of the fields to stop them being added to the CRM. When ready select **Copy Data to CRM**.

Field	CRM data	Client data
First Name	Hannah	Hannah
Last Name	Hough	Hough
Mobile	07816090186	07816090186

Field	CRM data	Client data
Address	32 Tremblay Parks Suite	
City	London	
County		
Postcode	L24 8SP	

9. Closing the form using the top right X or selecting **Do Not Accept Data Changes** will close the form and the information is lost. You would have to send out another **Client Information Request**.

10. Once copied into the CRM, the fields will be populate and you will be notified that there is sensitive data in for the client. Clicking **Edit Record** next to the **Sensitive Data** field will take you to the information and you will be able to edit the information. This is a separate screen in the CRM because this information is stored securely in the database away from other information. You have now completed your **Client Information Request**.

Sensitive Data:

Sensitive Data for Miss. Hannah Hough [Edit Record](#)