fibre CRM

Sending a Client

Information Request

3. Client box you can select the Sender and Email Template. You can view the email before PRACTICE you send by tick the Preview Email Before Sending box. Visit support.fibrecrm.com for more info or contact your CRM Manager Once done click Send.

Sender	Nickie Shaw - Email Template - Client Portal -
Send SMS PIN to	07816
Send Email to	Contact: Miss. Hannah Hough - hannah hough
	Preview email before sending
Email Subject	Important: Request for Client Information
File Edit View	Inset Format Tools Table
12pt V	Paragraph V sans-sent V E O O F A V V W H V
Click here to sig Should you have Kind regards.	n in and update your personal information any questions please do get in fouch.
rona rogaras,	

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



5. Once they click Once they click 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 Please set a password to continue Enter new password (required) 9 Password must be at least 8 characters and contain at least 1 number and 1 special character (e.g. I*SE) Repeat password (required) (SMS Code (required) ----Copyright 2022 - FibreCRM - V1.1.1

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.

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.

ACTIONS 🔻 Edit Duplicate Delete Find Duplicates Manage Subscriptions Print as PDF View Change Log Client Information Request

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OF THE



fibrecrm HEART OF THE PRACTICE

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

Sending a Client Information Request

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.

3/3	→ 3/4	→ 2/4	→ 2/4	→ <u>2/4</u>	→
Contact Information					
Address					
Address *					۵
City*					
County		Please select			~
Postcode					
					Next

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.

MISS. HAN	NAH H	оидн 📘	IEW RETURNED	INFORMATION			
Business Card	Address	Keep In Touch	Personal	Categories	Personal Tax	Source	ACTIONS 👻

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.

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.

			· · · · · · · · · · · · · · · · · · ·
	Contact Info	rmation	
	Tick All		
	Field	CRM data	Client data
	First Name	Hannah	Hannah
	Last Name	Hough	Hough
	Mobile	07816090186	07816090186
	Address		
	Tick All		
	Field	CRM data Clie	ent data
	✓ Address	32 1	fremblay Parks Suite
	 City 	Lon	don
	County		
	 Postcode 	L24	8SP
	Passport Ex	piry Date	
	 Copy of Pas 	sport	
	the second se		
	COPY DAT	A TO CRM	ANGES
Save dat	COPY DAT DO NOT A	A TO CRM CCEPT DATA CH	ANGES Hough
Save dat	COPY DAT DO NOT A	A TO CRM CCEPT DATA CH IM - Miss, Hannah I	ANGES Hough
Save dat	COPY DAT DO NOT A ta from Portal to Cf	A TO CRM CCEPT DATA CH IM - Miss, Hannah I	ANGES Hough
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Save dat Drivir Copy	COPY DAT DO NOT A ta from Portal to Cf m ag Licence Expiry Date of Driving Licence ssport	A TO CRM	ANGES fough
Save dat	COPY DAT DO NOT A ta from Portal to CP m ag Licence Expiry Date of Driving Licence ssport All	A TO CRM	ANGES fough
Save dat	COPY DAT DO NOT A ta from Portal to CP me. Ing Licence Expiry Date of Driving Licence ssport All	A TO CRM CCEPT DATA CH	ANGES fough
Save dat	COPY DAT DO NOT A ta from Portal to CP me ang Licence Expiry Date of Driving Licence ssport All hort Number	A TO CRM CCEPT DATA CH IM - Miss. Hannah I CRM data Cli	ANGES fough
Save dat	COPY DAT DO NOT A Ta from Portal to Cf m ag Licence Expiry Date of Driving Licence ssport All hort Number wort Kumber	A TO CRM CCEPT DATA CH IM - Miss. Hannah I CRM data Cli	ANGES fough
Save dat	COPY DAT DO NOT A Ta from Portal to Cf or g Ucence Expiry Date of Driving Ucence ssport All hort Number hort Number for Expiry Date	A TO CRM	ANGES fough
Save dat Drivir Copy Pas Field Passp Copy Copy	COPY DAT DO NOT A DO NOT A Ta from Portal to Cf me g Licence Expiry Date of Driving Licence ssport All hort Number nort Expiry Date of Passport	A TO CRM CCEPT DATA CH LM - Miss, Hannah I CRM data Ci	ANGES fough
Save dat Drivir Copy Pat Tick Field Passp Passp Zopy Passp	COPY DAT DO NOT A The from Portal to CP and a from Por	A TO CRM	ANGES Hough X
Save dat Drivir Copy Pass Field Passp V Copy Passp	COPY DAT DO NOT A a from Portal to CP ee. ag Ucence Expiry Date of Driving Ucence ssport All hort Number fort Expiry Date of Passport of Passport out country	A TO CRM	ANGES Hough
Save dat Drivir Copy Pass Tick. Field Passp Y Copy Passp	COPY DAT DO NOT A a from Portal to CP me. ag Licence Explry Date of Driving Licence ssport All hort Number hort Expiry Date of Passport hort country	A TO CRM	ANGES fough X
Save dat Drivir Copy Passp Passp Copy Passp	COPY DAT DO NOT A a from Portal to CP me ag Licence Expiry Date of Driving Licence ssport All ort Number ort Expiry Date of Passport ort country	A TO CRM CCEPT DATA CH	ANGES fough

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: