

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

Professional Clearance

1. To send a **Professional Clearance Letter** navigate to the **People** or **Organisation** record that the letter will be related to and check that the **Previous Accountant** sections have been completed. Make sure you have an email address in the **Previous Accountant Contact Email** field to send the letter.

Previous Accountant Firmname:	RCH Accountants LTD
Previous Accountant Contact Email:	rchaccountants@testexample.com
Prev Acc Address:	123 Finance Way
Prev Acc County:	Cornwall
Prev Acc Postcode:	TR10 9TA

Previous Accountant Contact Name:	Rosie Hill
Previous Accountant Contact Phone:	01122 345678
Prev Acc City:	Penryn
Prev Acc Country:	UK

2. If the **Previous Accountant** section hasn't got any information in select the **Edit** option from the **Actions Menu** and add the information. Once done click **Save & Close**.

ding	Passwords	ACTIONS ▼
<div> Edit Delete Find Duplicates View Change Log Send Professional Clearance Letter Send Email </div>		

3. Once the **Previous Accountant** sections are filled in, go the **Actions Menu** of the record and select **Send Professional Clearance Letter**.

ding	Passwords	ACTIONS ▼
<div> Edit Delete Find Duplicates View Change Log Send Professional Clearance Letter Send Email </div>		

4. The **Previous Accountant Email** pop up box will then appear. The **Sender** will default to the current user but can be changed by using the dropdown menu. Who the email is sent to is pulled through from **Previous Accountant Contact Email** field in the record. Tick the **Preview Email Before Sending** box to view the **Email Template**. You can make any changes if needed in the body of the email. Once done click **Send**.

Previous Accountant Email

Sender: fibrecrm
Email Template: Professional Clearance - Email
Send Email to: rchaccountants@testexample.com
☒ Preview email before sending

Email Subject: Professional Clearance - FibreCRM

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Dear sirs,

Please find attached a professional clearance letter in relation to services for FibreCRM

I would be grateful if you could respond to me at your earliest convenience.

33 WORDS POWERED BY TINY

Send Cancel