HEART fibrecrm Of THE PRACTIC PRACTICE

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

Setting the Professional Letter Clearance Template

To set the **Professional Clearance Letter** • Template to be used first navigate to your username in the top right hand corner and select Admin.

0	Bob 🗣
Empl	oyees
Admi	n
Logo	ut

Scroll down to FibreCRM Modules and then select CRM **C** • Options.

Quick2SMS License Settings	Configure Quick2SMS license settings
Quick2SMS FireText API Settings	Configure Quick2SMS firetext API, Message Length
Crm Options	Manage CRM Options.
Management	FibreCRM - error management and tracking module.

In CRM Options go to the Professional Clearance **O**. Template for Organisations and Professional Clearance Template for People click the select arrows to choose a template.

Edit CRM	1 Options
	CRM Options
CRM Type	demo
Marketing Platform	Campaign Monitor
Professional clearance template for Organisations	
Professional clearance template for People	
	SAVE

The select arrow will bring up a pop up box with a list of templates. 4. Choose the template you'd like to use.

Name	Туре	Subject	Description	Assigned to			
professional	Campaign Email Event			AW Bob CJ CP portal clientportal			
SEARCH CL	EAR						
nail Templates List			Type 🖨	Description	llser ≙	Date Modified 🔶	Date Created 🔶
nail Templates List Name 🔶	-		Туре	Description	User 🔶	Date Modified $~~\Leftrightarrow~$	Date Created \Leftrightarrow
nail Templates List Name 🔶 Professional Clearance	• Letter - individual	-	Type \Leftrightarrow Email	Description	User 🔶 <u>Bob</u>	Date Modified	Date Created
nail Templates List Name 🗢 Professional Clearance Professional Clearance	: Letter - individual	-	Type \Leftrightarrow Email Email	Description	User 🔶 Bob Bob	Date Modified	Dato Created

Once you've selected the templates you'd like to use click **Save**.

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E	dit CRN	4 Options				
		CRM Options				
	CRM Type	demo				
Mark	keting Platform	Campaign Monitor				
Professional clearance template for	r Organisations	Professional Clearance Letter				
Professional clearance temp	late for People	Professional Clearance Letter - individual				
		SAVE				
	Previous Accountant	Email				
C The templates	Sender	Sender Select the sender				
vou've	Email Template	Professional Clearance Letter - Individual				
colocted will now	Send Email to					
selected will now		🖾 Preview email before sending				
be automatically	Email Subject	Notice: Saccount_name - Clearance				
selected for a user		File Edit View Insert Format Tools Table				
n send Professional		12pt v Paragraph v Calibri v 🖨 🗘 🕑 🕨 <u>A</u> v 🖉 V				
Clearance Letter pop		\blacksquare \checkmark \mathscr{I}				
up box.		Dr. Roy Abrams				
		We have been approached by the above to act as accountant, and we are therefore writing to confirm				
		whether or not there are any professional reasons why we should not accept the appointment.				
		Accuming you know of no professional reason why we should not accent the appointment we would P				
		Send A Cancel				