fibrecrm HEART OF THE PRACTICE

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Engagement Letter Configuration

1 In CRM you can configure your Engagement Letters such as setting Email Notification Templates, Engagement Letter Expiry Time and Period Days. To do this first navigate to the Engagement Letter Module. This can be found in Opportunities or All in the Navigation Menu at the top of the screen.

✿ CONTACTS	OPPORTUNITIES	MARKE	TING	ACTIVITY	AUTOMATION	ALL
Recently Viewe	Engagement Letter					
,	Engagement Letter Brands		Upsell Matrix		Lead Pipeline	
💄 Mrs. Anna Deem	KReports v4.4					
AML check for Mr. S	LOE History Log		GAMEPLAN			
			_			

2. In the options on the left handside select Engagement Letters Configuration or Default Task Email templates depending on your system labelling.



3. On the Engagement Letters Configuration screen. You can toggle on or off whether the Organisation email can be selected. Below that you can set Email Notifications, here you can set what email template is sent to the Assigned User of the Engagement Letter when the status of the letter is changed by selecting an email template from the drop down menu. A Task will also be created for the Assigned User and you can set how many Task Due Days by typing in the box. Click the Save button for each section once you've configured how you would like it.

Engagement Letters configuration					
Account of Email Address On/Off					
A toggle which will enable or disable the sending of engagement letters to account email addresses. Account email address hidden SAVE					
Email Notification Templates					
When the Engagement Letter Status is changed an email notification will be sent to the user Assigned to the Engagement Letter and a Task created for them to review and complete. Use the Status Options below to choose which Email Template will be used for each Status.					
Awaiting Partner Review	Select the email template	Та	Task Due Days		
Partner Review Completed	Select the email template	Та	Task Due Days		
Accepted	Select the email template	Та	Task Due Days		
Accepted Digitally	Select the email template	Та	Task Due Days		
Declined	Select the email template	Та	Task Due Days		
	SAVE	- -			

4. Below you can set your default Engagement Letter Auto Expiry Days. You can also set your default Period Start and Period End days in the boxes and finally below you get select the Send Signed Letter To and then

Letter To and then	Engagement Letter expiry days
email template they	Set your default Engagement Letter auto expiry days
receive. Click the Save	
button in each section	Engagement Letter period days
once you've config-	Set your default Engagement Letter period start days.
ured how you would	Set your default Engagement Letter period end days.
like it. Once done your	
Engagement Letter	SAVE
Configuration	Send Signed Engagement Letter To
settings will be active.	Send signed Engagement Letter to
	Select Email Template Select the email template
	SAVE