# 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.

2. In the options on the left handside select **Engagement Letters Configuration** or **Default Task Email** templates depending on your system labelling.
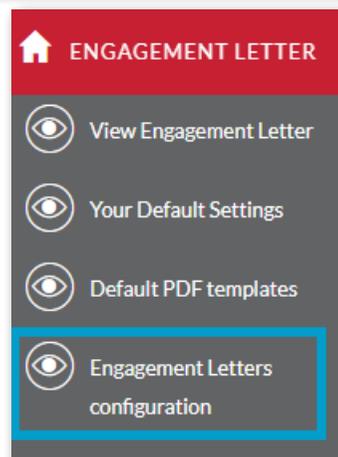
3. On the **Engagement Letters Configuration** screen. You can toggle on or off whether the **Organisation** email can be selected. Below that you can set **Email Notifications**, here you can set what email template is sent to the **Assigned User** of the Engagement Letter when the status of the letter 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 Day**s by typing in the box. Click the **Save** button for each section once you've configured how you would like it.
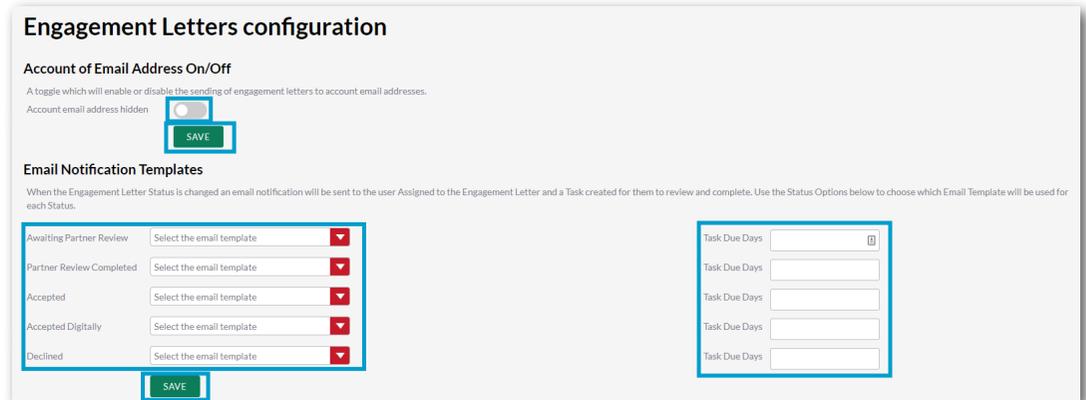
4. Below you can set your default **Engagement Letter Auto Expiry Days.** You can also set your default **Period Start** and **Period End** days in the boxes and finally below you get select the **Send Signed Letter To** and then email template they receive. Click the **Save** button in each section once you've configured how you would like it. Once done your **Engagement Letter Configuration** settings will be active.