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Engagement Letter Appendices

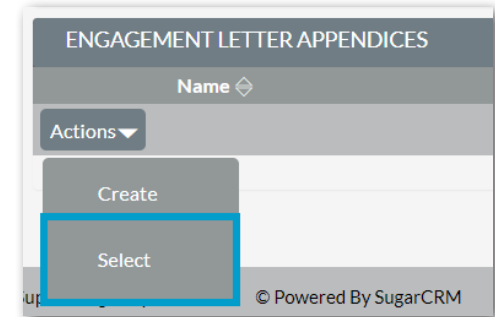
1. In CRM you can also Appendices to your Engagement Letters. These can be used to add specific sections or information to Engagement Letters which don't need to be included in every letter sent.

2. To add Appendices to an Engagement Letter navigate to the Opportunity that the Engagement Letter will be related to and scroll down to the Engagement Letter Appendix subpanel.

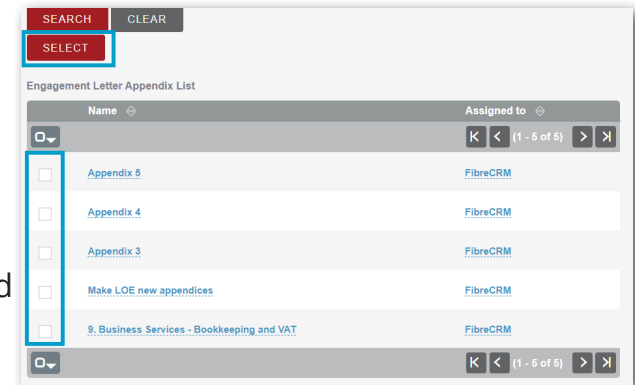


Note: As Appendices are added at Opportunity Level you will need to select the appendices you want to add to the Engagement Letter before you create the engagement letter in the Actions Menu. This is because information from Opportunity is pulled into Engagement Letter upon its creation. Once created anything added to the Opportunity will not be added to the letter and will need to be created again.

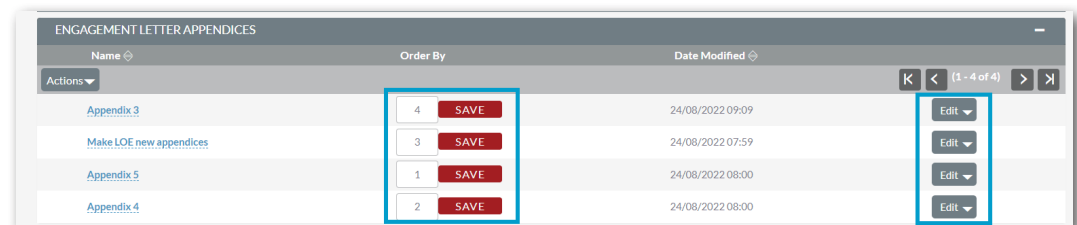
3. In the Actions Menu drop down click the Select option.



4. A pop up box will then appear with the Engagement Letter Appendix List. Use the Tick Boxes to select the Appendices you'd like to include. Once you've selected the Appendices you'd like to use click Select.



5. The Appendices will now be listed in the Subpanel. In the Order By column you can sort the Appendices in the order you'd like them to appear in the text boxes. Once done click Save. To remove any appendices click the Edit option.



6. Once you've added and ordered the Appendices you would like. Create your Engagement Letter in the Actions Menu. The Appendices you have added will be shown in the Engagement Letter.