fibreCRM HEART OF THE PRACTICE

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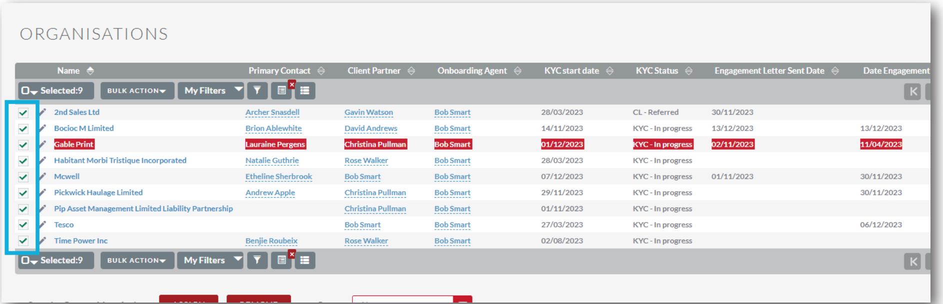
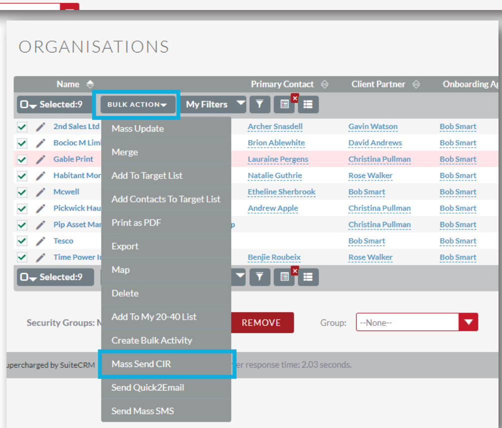
Sending Client Info Requests En Masse

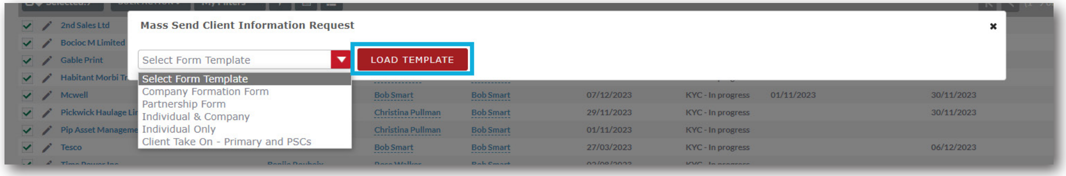
1. You can **mass send a client information request** from either the **Person** module or the **Organisation** module in the List View of records. To send a mass client information request use the select boxes on the left hand side of the list view of either module to choose the records you are going to send the information request to.



2. Once you've selected the records you're going to send the client information request to, navigate to the **Bulk Actions** menu and in the dropdown select **Mass Send CIR.**

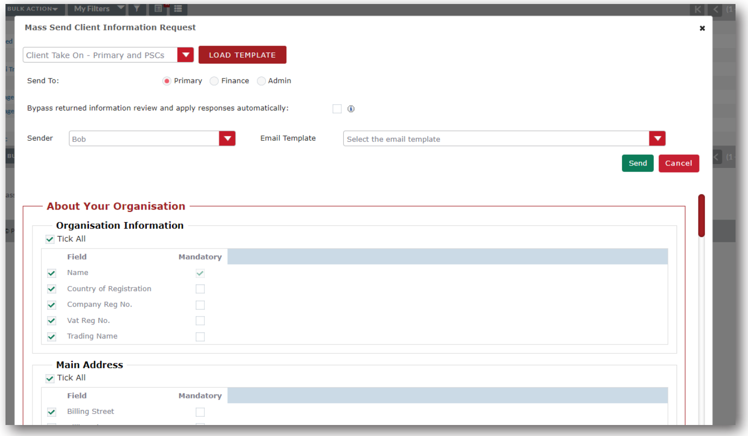


3. In the pop up box select the form template you want to use for the request from the dropdown menu and then select **Load Template**.



4. Below the form template will load you can select the **sender** and **email template**. As per an individual request you can also select which fields you are requesting and make ones mandatory if they aren't already. The **bypass returned information review tickbox** allows you to bypass the client submission review stage and update the record automatically with the clients submitted data. If left unticked, each response will need to be reviewed.

If sending from the Organisation module you can choose to send the request to the **Primary, Finance or Admin contact.** If an Organisation doesn't have the contact role chosen then that request will fail for that record.



5. When you're ready to send out the Mass CIR click **Send**. The Mass Client Information request will now be sent out and your selected clients will each receive a request for information as they would do if you'd sent an individual request.