fibreCRM

HEART OF THE PRACTICE

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Sending Client Info Requests En Masse

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.

Name 🔶	Primary Contact $\ \ominus$	Client Partner $\ \ominus$	Onboarding Agent $~~\ominus~$	KYC start date $\ \ominus$	KYC Status \ominus	Engagement Letter Sent Date $~~\ominus~$	Date Eng
Selected:9 BULK ACTION - My Filters							
🖉 2nd Sales Ltd	Archer Snasdell	Gavin Watson	Bob Smart	28/03/2023	CL - Referred	30/11/2023	
Bocioc M Limited	Brion Ablewhite	David Andrews	Bob Smart	14/11/2023	KYC - In progress	13/12/2023	13/12/20
🖉 Gable Print	Lauraine Pergens	Christina Pullman	Bob Smart	01/12/2023	KYC - In progress	02/11/2023	11/04/20
 Habitant Morbi Tristique Incorporated 	Natalie Guthrie	Rose Walker	Bob Smart	28/03/2023	KYC - In progress		
Mcwell	Etheline Sherbrook	Bob Smart	Bob Smart	07/12/2023	KYC - In progress	01/11/2023	30/11/20
Pickwick Haulage Limited	Andrew Apple	Christina Pullman	Bob Smart	29/11/2023	KYC - In progress		30/11/20
Pip Asset Management Limited Liability Partnership		Christina Pullman	Bob Smart	01/11/2023	KYC - In progress		
🖍 Tesco		Bob Smart	Bob Smart	27/03/2023	KYC - In progress		06/12/20
Time Power Inc	Benjie Roubeix	Rose Walker	Bob Smart	02/08/2023	KYC - In progress		

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

Name 🔶		Primary Contact \ominus	Client Partner 🔶	Onboarding /
□- Selected:9	BULK ACTION - My Filters			
🗸 🧪 2nd Sales Ltd		Archer Snasdell	Gavin Watson	Bob Smart
🖌 🖌 Bocioc M Lim		Brion Ablewhite	David Andrews	Bob Smart
🖌 🧪 Gable Print		Lauraine Pergens	Christina Pullman	Bob Smart
🖌 🧪 Habitant Mor		Natalie Guthrie	Rose Walker	Bob Smart
🗸 🧪 Mowell	Add Contacts To Target List	Etheline Sherbrook	Bob Smart	Bob Smart
🖌 🧨 Pickwick Hau		Andrew Apple	Christina Pullman	Bob Smart
🖌 🧪 Pip Asset Mar		p	Christina Pullman	Bob Smart
🗸 🧪 Tesco			Bob Smart	Bob Smart
🗸 🧪 Time Power II		Benjie Roubeix	Rose Walker	Bob Smart
O- Selected:9		▼▼■■		
Security Groups: N		REMOVE G	roup:None	
ercharged by SuiteCRM		er response time: 2.03 se	conds.	
	Send Quick2Email			

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.

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~	🖌 🧨 2nd Sales Ltd	Mass Send Client Information Reques	t					×
~	/ Bocioc M Limited			-				
~	/ Gable Print	Select Form Template	LOAD TEMPLATE					
~	/ / Habitant Morbi T	Select Form Template						
~	/ Mowell	Company Formation Form	Bob Smart	Bob Smart	07/12/2023	KYC - In progress 0	01/11/2023	30/11/2023
~	Pickwick Haulag	Lir Individual & Company	Christina Pullman	Bob Smart	29/11/2023	KYC - In progress		30/11/2023
~	/ Pip Asset Manag	eme Individual Only	Christina Pullman	Bob Smart	01/11/2023	KYC - In progress		
~	/ Tesco	Client Take On - Primary and PSCs	Bob Smart	Bob Smart	27/03/2023	KYC - In progress		06/12/2023
	A	David Deckster		Disk Constant				

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.

lieht Take On - Primary and PSCs ▼ CAD TEHELIXE end To: ● Primary ● Primary ● Primary ● Admin sysses returned information review and apply responses automatically: ● @ liender 0:00 ▼ Cmail Template Select the email template ♥ Companisation Information ♥ Tot All ♥ Tot All ♥ Handatory	2 Cancel
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Country of Registration	
Company Reg No.	
Vat Reg No.	
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Main Address	
Tick All	
Field Mandatory	

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.

iπ	Send To: Primary Finance Admin							
ige	Bypass returned information review and apply responses automatically:							
	Sender	Bob	Email Template	- Client Information Request (SP)				
BL					Send Cancel	< (1		