

Creating a Property Brochure or Window Card - Sales and Lettings



This guide provides a straightforward process for creating a professional property brochure, which is essential for effectively marketing real estate.

By following the steps outlined, users can quickly generate a visually appealing document, from documents that have been pre selected, that showcases property details, enhancing visibility to potential buyers or renters.

Utilising this guide can save time and ensure that all necessary information is presented clearly and attractively.



Alert!

You will need to have selected the brochures from our catalogue, or sent your CRM Onboarding Specialist your current documents.

1

Navigate to <https://crm.iamproperty.com/MyDay>

To create a Brochure, Window Card etc.



Tip! We show a Lettings property here, however the process is the same if creating a brochure for a sales property.

Brochures and Window Cards are created in the same way, you select the appropriate document to create.

2 Click "Lettings" (or Sales)

The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes the iamproperty logo, a 'My day' dropdown, and a 'Lettings' dropdown which is highlighted with an orange circle. Other dropdowns for 'Sales', 'Accounts', 'Reporting', and 'Communications' are also visible. On the right, there are icons for a grid, calendar, notifications, and search, along with a 'My acc' button. The main heading is 'Welcome back, Training'. Below this are three buttons: '+ Add New Record' (orange), 'View Property Management' (green), and 'Visit Help Centre' (blue). A search bar labeled 'Search all records' is present. The dashboard is divided into two main sections: 'Today's events' on the left, which shows 'No events' and 'You have no events today', and 'My tasks' on the right, which displays a table of tasks.

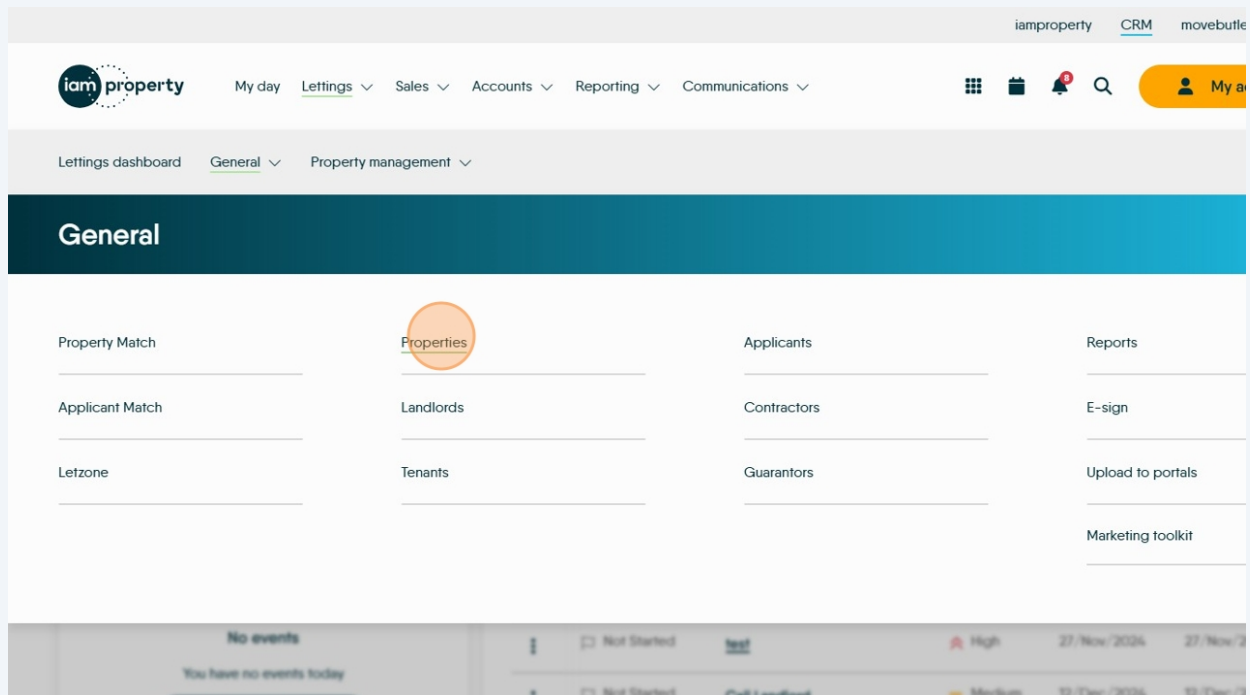
Status	Name	Priority	Start date	Due date
Not Started	<u>Call Landlord</u>	High	15/Nov/2024	15/Nov/2024
Not Started	<u>test</u>	High	27/Nov/2024	27/Nov/2024
Not Started	<u>Call Landlord</u>	Medium	12/Dec/2024	12/Dec/2024

3 Click "General"

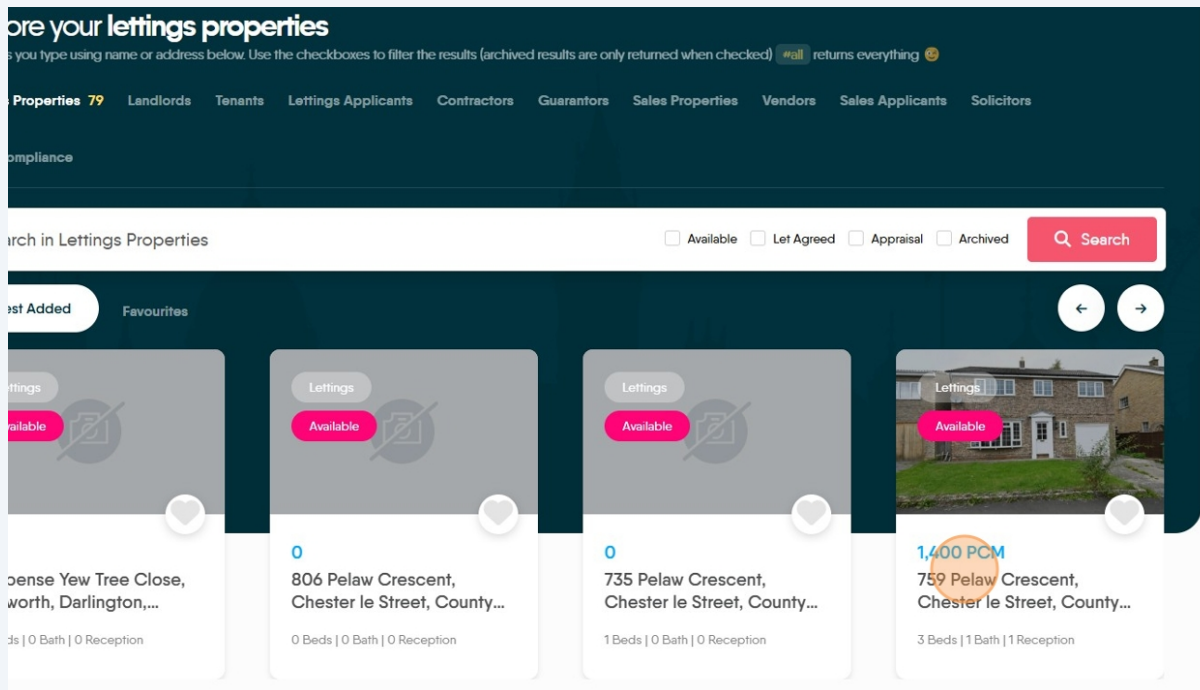
This screenshot is identical to the one above, showing the iamproperty CRM dashboard with the 'Lettings' dropdown highlighted. However, in this step, the 'General' dropdown under the 'Lettings' menu is highlighted with an orange circle. The rest of the dashboard content, including the 'Welcome back, Training' heading, buttons, search bar, and task table, remains the same.

Status	Name	Priority	Start date	Due date
Not Started	<u>Call Landlord</u>	High	15/Nov/2024	15/Nov/2024
Not Started	<u>test</u>	High	27/Nov/2024	27/Nov/2024
Not Started	<u>Call Landlord</u>	Medium	12/Dec/2024	12/Dec/2024

4 Click "Properties"



5 Search for and select the property you want to create the brochure for. To display all the properties, click the "#All" option on the screen or type "#All" into the search bar.



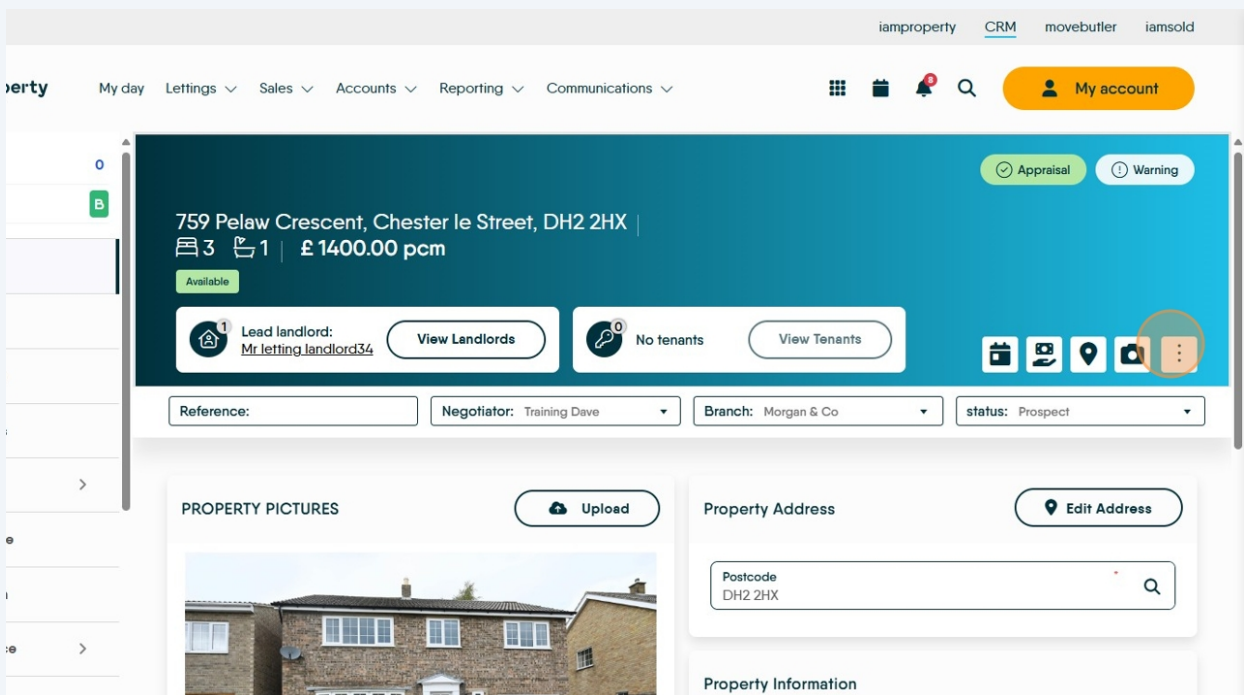


Tip! If you know the Property you want to create the Brochure for then use the search tool

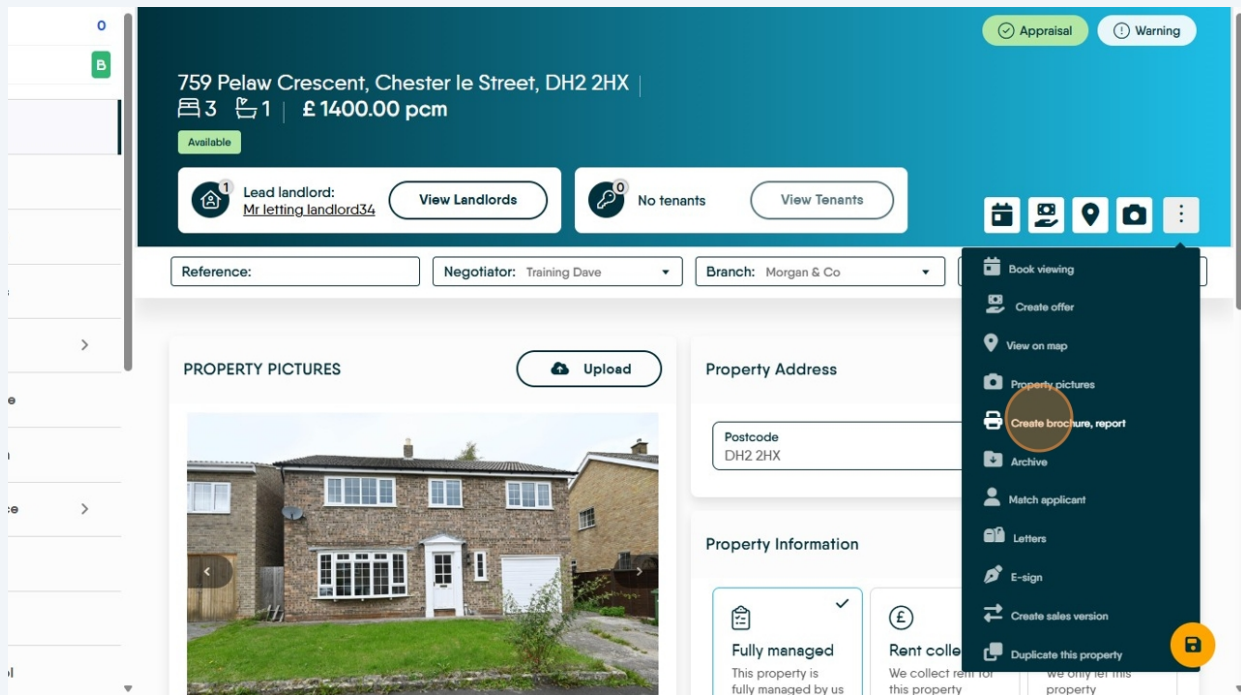


6

Click here.

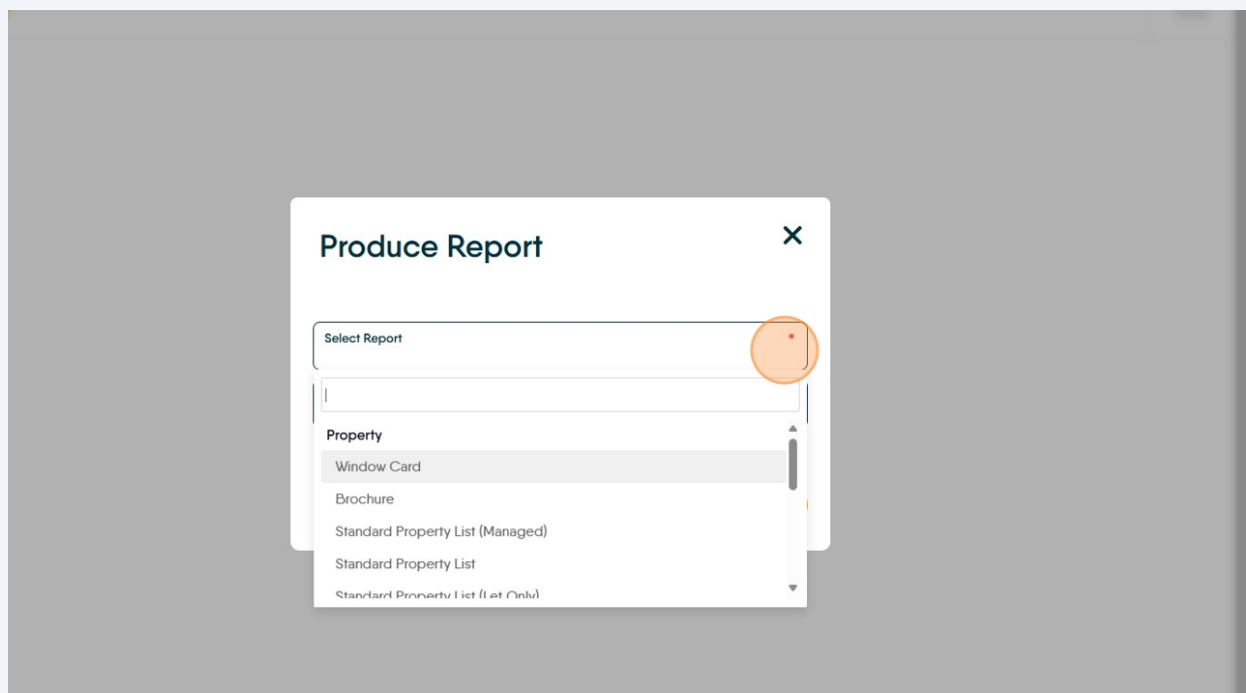


7 Click "Create Brochure, Report"



8 Click here to show the list of documents available. As previously mentioned this list is based on what has been supplied to iamproperty CRM or selected from our standard documents list.

Click on your chosen brochure/window card



Produce Report ✕

Select Report *

Property

- Window Card
- Brochure
- Standard Property List (Managed)
- Standard Property List
- Standard Property List (Let Only)

9 Check the Property address is correct.

Produce Report ✕

Select Report *

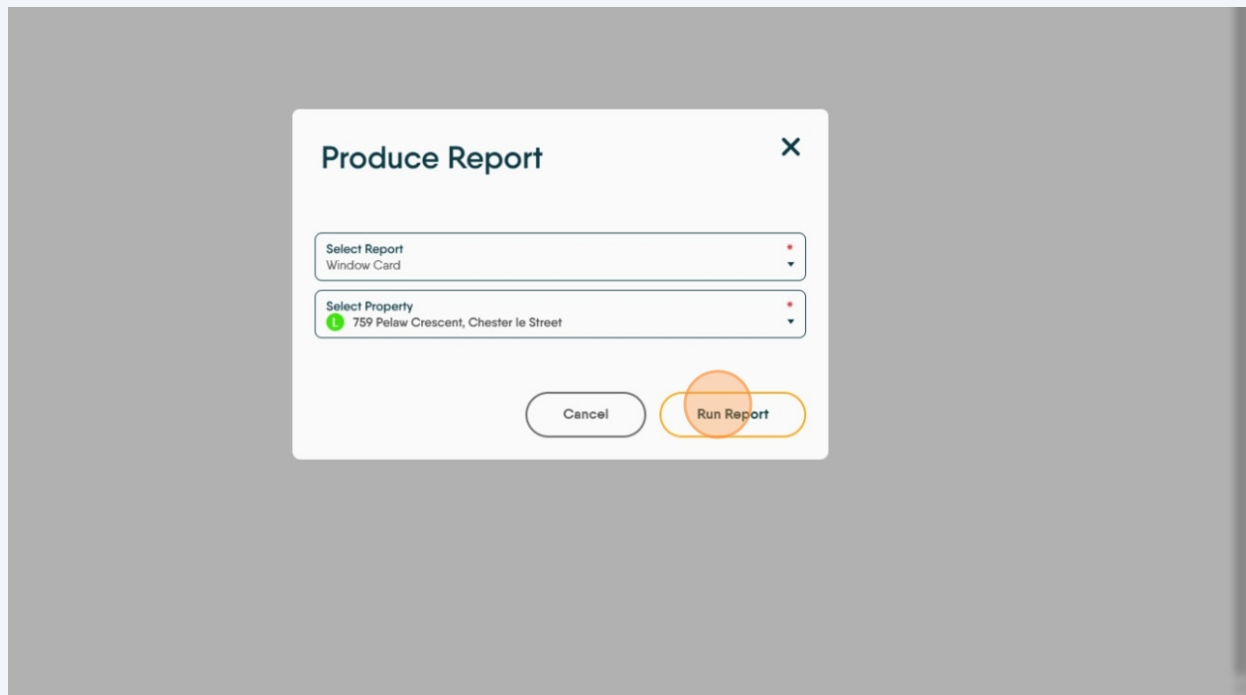
Window Card

Select Property *

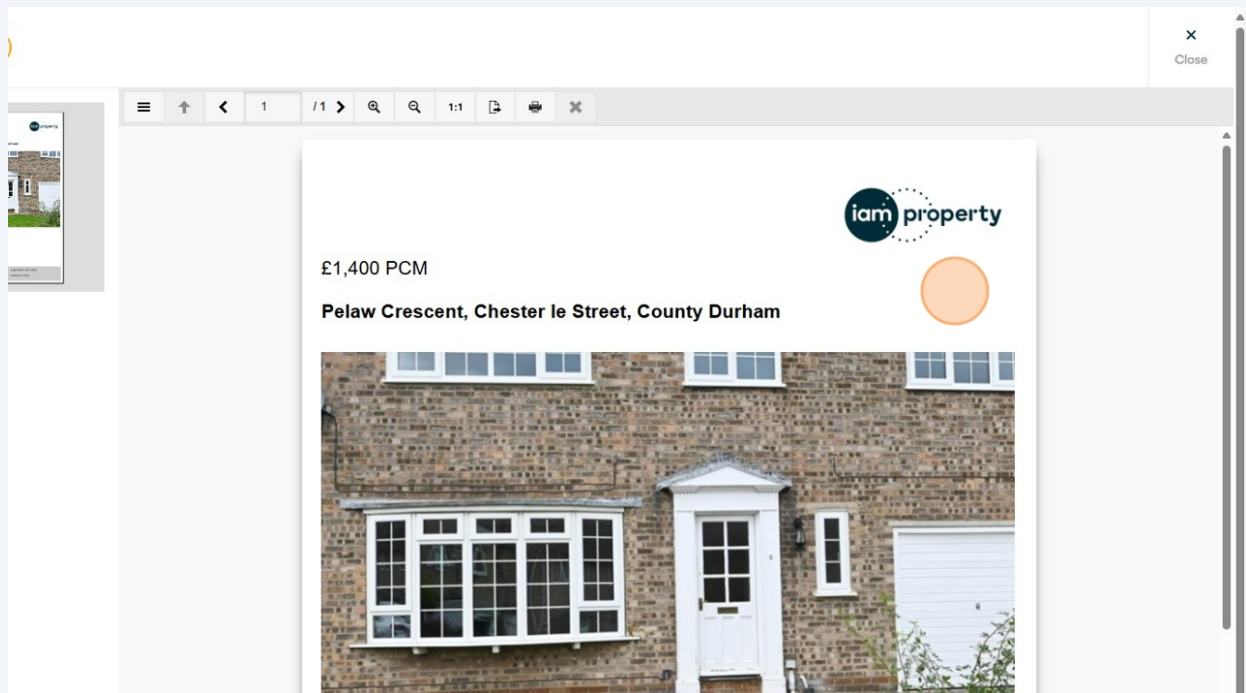
759 Pelaw Crescent, Chester le Street

Please enter 1 or more characters

10 Click "Run Report"



11 A proof of your Brochure will show, this will be a representation of what will be produced. *N.B. this is a proof screen and may not display perfectly.*

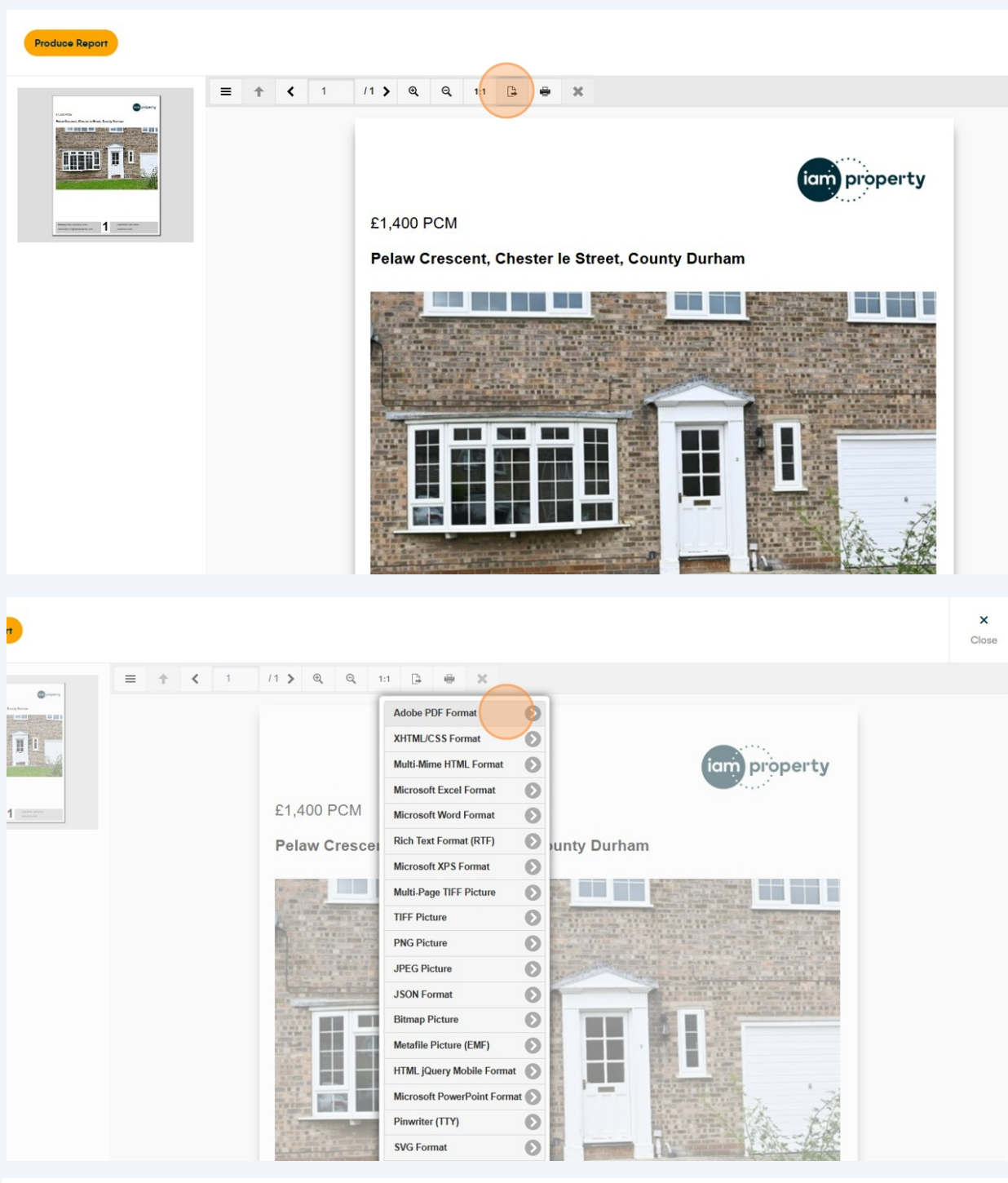


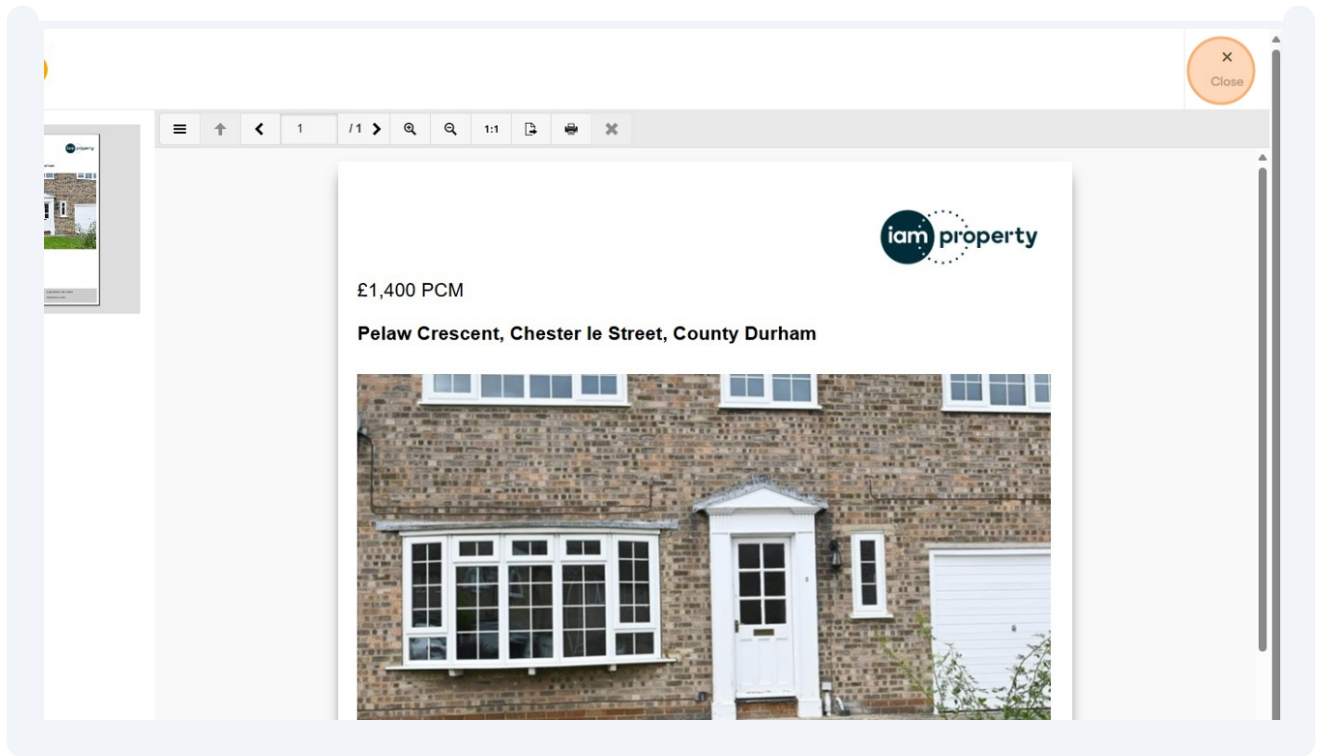
12

Click "Export"

Click "Adobe PDF Format" (this is the best format to export a brochure or window card), the file will be saved to the downloads folder of your computer. This document can then be printed or emailed as required.

Click "Close" to exit the screen.





If you want any edits to your brochure, window cards etc. please contact CRM support on crm-support@iamproperty.com or 01865 860870