

# Using the Activity List




This guide provides a comprehensive overview of accessing and utilising the Lettings and Sales Activity lists within the CRM system, making it essential for users looking to effectively manage property listings and appointments. It simplifies the process of navigating through dashboards.

By following the outlined steps, users can efficiently track tasks, view relevant data, and maintain a structured calendar, ultimately improving their workflow in property management.

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

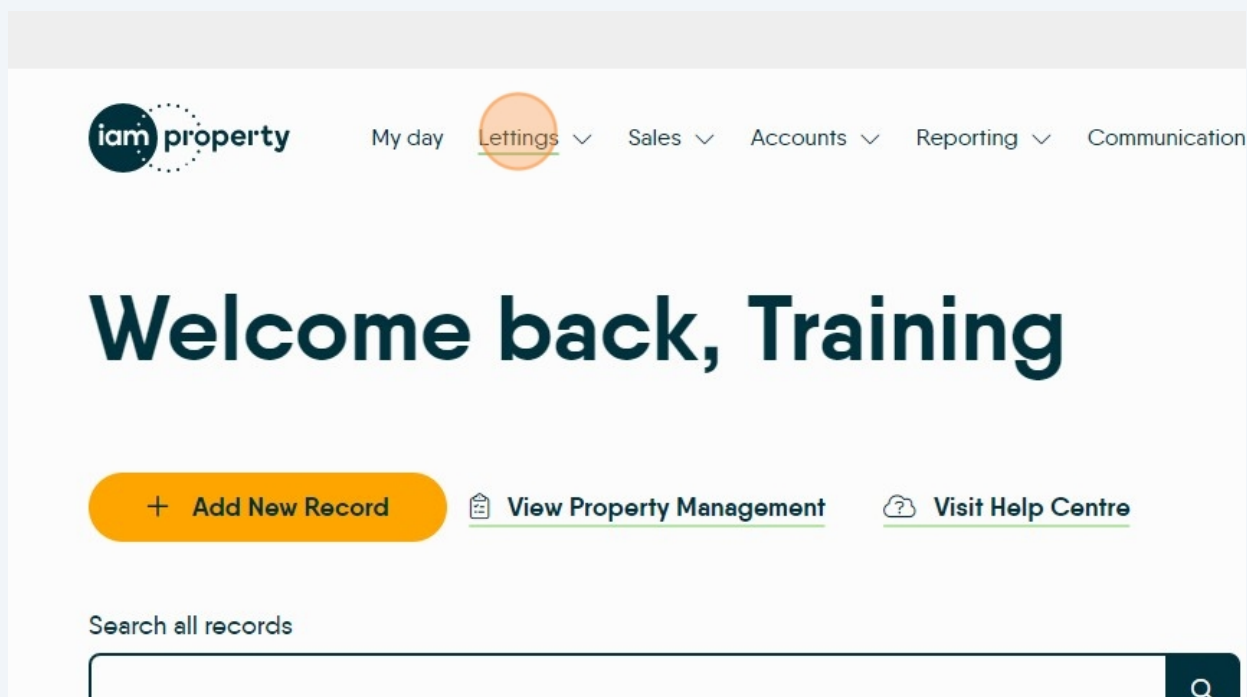
## Accessing Lettings (or Sales) Dashboards and Activity Lists

 For this guide we will use the Lettings Dashboard.

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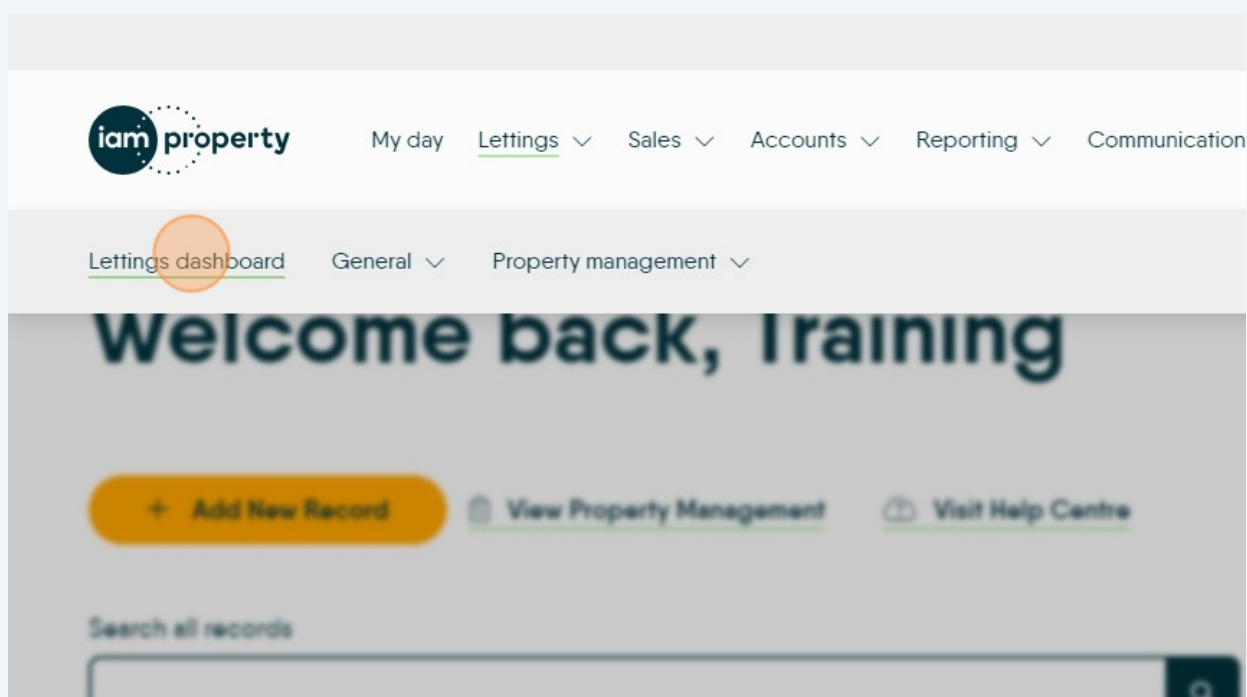
The Activity Lists are a key place from where to manage your day to day activities. The activity lists keep you up to date with what needs doing at that moment in time, from contacting customers to managing compliance.

To access the Lettings dashboard. Click "Lettings"



3

Click "Lettings dashboard"



- 4 For Sales Dashboard. Click "Sales" then click "Sales Dashboard"

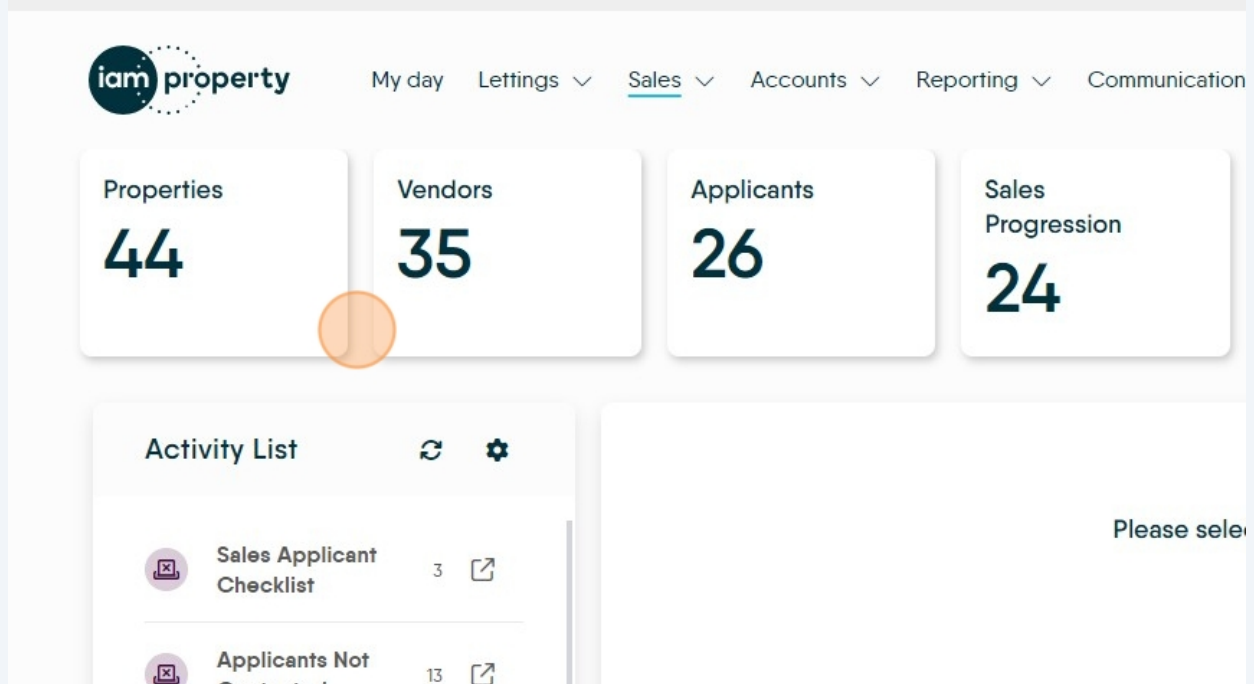
The screenshot shows the 'iam property' dashboard. The navigation bar includes 'My day', 'Lettings' (underlined), 'Sales' (highlighted with an orange circle), 'Accounts', 'Reporting', and 'Communications'. Below the navigation bar are four summary cards: 'Properties' with a value of 73, 'Landlords' with a value of 49, 'Tenants' with a value of 52, and 'Applicants' with a value of 10. Below these cards is an 'Activity List' section with a refresh icon and a settings gear. The activity list shows 'Deposits Requiring Registration' with a count of 4 and a link icon. To the right of the activity list is a large empty box with the text 'Please select'.

The screenshot shows the 'Sales' dashboard. The navigation bar includes 'My day', 'Lettings' (underlined), 'Sales' (underlined and highlighted with an orange circle), 'Accounts', 'Reporting', and 'Communication'. Below the navigation bar is a dark teal header with the word 'Sales'. Below the header is a grid of links. On the left side, the links are 'Sales Dashboard' (highlighted with an orange circle), 'Properties', 'Vendors', and 'Applicants'. On the right side, the links are 'Property Match', 'Applicant Match', 'Reports', and 'Marketing toolkit'.

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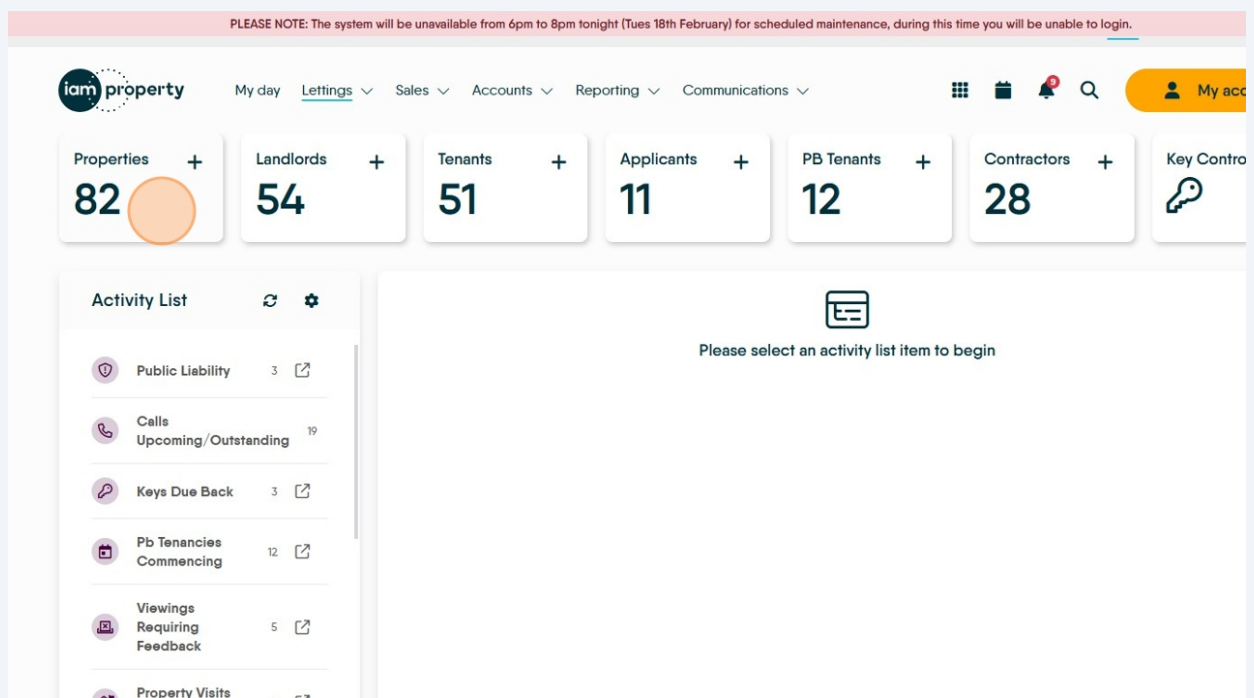
Once in the dashboard you can use the tiles at the top to move from this screen to view property lists, landlords etc. Each tile takes you to a list of (for example) Properties, the number shows the amount of items in the list e.g. 44 Properties.

The Activity List is below the tiles on the left side of the screen.



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Click "Properties" this takes you to a list of all your properties.





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The initial view is the 4 most recently added properties. Click "#all" or type #all into the search box to see all the properties on the CRM

PLEASE NOTE: The system will be unavailable from 6pm to 8pm tonight (Tues 18th February) for scheduled maintenance, during this time you will be unable to login.

iam property My day Lettings Sales Accounts Reporting Communications

Explore your **lettings properties**  
Search as you type using name or address below. Use the checkboxes to filter the results (archived results are only returned when checked) #all returns everything

Lettings Properties 82 Landlords Tenants Lettings Applicants Contractors Guarantors Sales Properties Vendors Sales Applicants Solicitors

Sales Compliance

Search in Lettings Properties ☐ Available ☐ Let Agreed ☐ Appraisal ☐ Archived Search

Latest Added Favourites

Lettings Available 1,300 PCM 774 Pelaw Crescent, Chester le Street, County... 3 Beds | 1 Bath | 1 Reception

Lettings Available 1,200 PCM 1091 Pelaw Crescent, Chester le Street, County... 3 Beds | 1 Bath | 2 Reception

Lettings Available 1,500 PCM 228 Yew Tree Close, Hurworth, Darlington,... 4 Beds | 2 Bath | 1 Reception

Lettings Available 0 suspense Yew Tree Close, Hurworth, Darlington,... 0 Beds | 0 Bath | 0 Reception

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You can view the property list in two ways, as a screen of tiles or as a list. Click here.

Explore your **lettings properties**  
Search as you type using name or address below. Use the checkboxes to filter the results (archived results are only returned when checked) #all returns everything

Lettings Properties 82 Landlords Tenants Lettings Applicants Contractors Guarantors Sales Properties Vendors Sales Applicants Solicitors

Sales Compliance

#all ☐ Available ☐ Let Agreed ☐ Appraisal ☐ Archived Search

'#all' returns 82 properties

Property Address	Reference	Rent	Town	Landlord
<a href="#">774 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX</a>		1,300 PCM	Chester le Street	<a href="#">landlord55</a>
<a href="#">1091 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX</a>		1,200 PCM	Chester le Street	<a href="#">Lettings.landlord99</a>
<a href="#">228 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX</a>		1,500 PCM	Darlington	<a href="#">Arthur Morgan</a>
<a href="#">suspense Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX</a>		0	Darlington	<a href="#">David-George Morgan</a>
<a href="#">806 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX</a>		0	Chester le Street	<a href="#">Letting Landlord</a>
<a href="#">735 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX</a>		0	Chester le Street	<a href="#">Landlord5</a>
<a href="#">759 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX</a>		1,400 PCM	Chester le Street	<a href="#">letting.landlord34</a>

## ore your lettings properties

as you type using name or address below. Use the checkboxes to filter the results (archived results are only returned when checked) #all returns everything

Properties 82 Landlords Tenants Lettings Applicants Contractors Guarantors Sales Properties Vendors Sales Applicants Solicitors

compliance

☐ Available ☐ Let Agreed ☐ Appraisal ☐ Archived

Search

Export to CSV

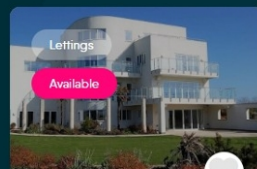
#all returns 82 properties



1,300 PCM

74 Pelaw Crescent,  
Chester le Street, Count...

Beds | 1 Bath | 1 Reception



1,200 PCM

1091 Pelaw Crescent,  
Chester le Street, Count...

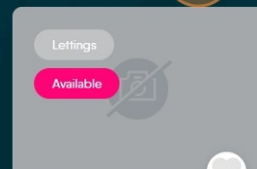
3 Beds | 1 Bath | 2 Reception



1,500 PCM

228 Yew Tree Close,  
Hurworth, Darlington,...

4 Beds | 2 Bath | 1 Reception



0

suspense Yew Tree Close,  
Hurworth, Darlington,...

0 Beds | 0 Bath | 0 Reception

9

The property lists can be exported as a CSV or printed to PDF  
Click here.

## ore your lettings properties

as you type using name or address below. Use the checkboxes to filter the results (archived results are only returned when checked) #all returns everything

Properties 82 Landlords Tenants Lettings Applicants Contractors Guarantors Sales Properties Vendors Sales Applicants Solicitors

compliance

☐ Available ☐ Let Agreed ☐ Appraisal ☐ Archived

Search

#all returns 82 properties



1,300 PCM

74 Pelaw Crescent,  
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Beds | 1 Bath | 1 Reception



1,200 PCM

1091 Pelaw Crescent,  
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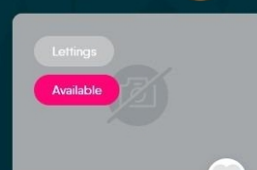
3 Beds | 1 Bath | 2 Reception



1,500 PCM

228 Yew Tree Close,  
Hurworth, Darlington,...

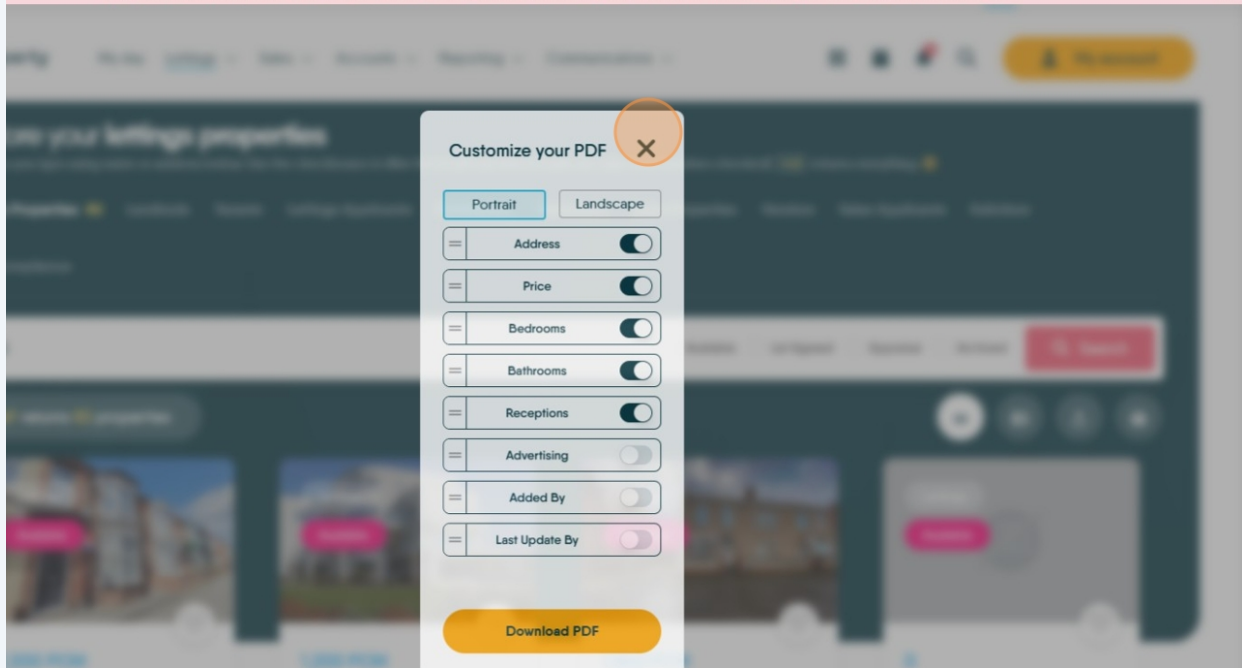
4 Beds | 2 Bath | 1 Reception



0

suspense Yew Tree Close,  
Hurworth, Darlington,...

0 Beds | 0 Bath | 0 Reception



## 10 Using the Property List as an example.

The columns can be re ordered as required. You can click onto the column title to re sort the list into ascending or descending order. The underlined information e.g. Address, Landlord, Tenant can be selected and you will be taken to the record. Allowing for easy navigation around the CRM and easy to find the correct information quickly.

The information can also be sorted using the check boxes in the search bar.

All the other options e.g. Landlords, Tenants, Applicants etc. are similar in their functions.

**Explore your lettings properties**  
Search as you type using name or address below. Use the checkboxes to filter the results (archived results are only returned when checked) #all returns everything 😊

Lettings Properties 82 Landlords Tenants Lettings Applicants Contractors Guarantors Sales Properties Vendors Sales Applicants Solicitors

Sales Compliance

#all ☐ Available ☐ Let Agreed ☐ Appraisal ☐ Archived Search

'#all' returns 82 properties

Property Address	Reference	Rent	Town	Landlord	Tenant
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<a href="#">1091 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX</a>		1,200 PCM	Chester le Street	<a href="#">Lettings landlord99</a>	
<a href="#">228 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX</a>		1,500 PCM	Darlington	<a href="#">Arthur Morgan</a>	
<a href="#">suspense Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX</a>		0	Darlington	<a href="#">David-George Morgan</a>	
<a href="#">806 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX</a>		0	Chester le Street	<a href="#">Letting Landlord</a>	
<a href="#">735 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX</a>		0	Chester le Street	<a href="#">Landlord5</a>	
<a href="#">759 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX</a>		1,400 PCM	Chester le Street	<a href="#">letting landlord34</a>	

## Activity List



Tip! The Activity Lists help you manage your daily tasks. A task will only show in the Activity List if there is a entry to view e.g. 'Applicants not contacted' will not show if there are no applicants to contact. The timescales for each record can be edited in the setup, any UDF or Checklist record that has a date element will also show in the Activity List.

## 11

Or use the Activity List section to view tasks that are currently due in a pre-set time frame (edited from the cog icon) Click "Applicants Not Contacted"  
Click "Appraisals Requiring Conclusion"  
Click "Keys Due Back"

## Activity List



- Sales Applicant Checklist 3
- Applicants Not Contacted 13
- Appraisal Checklist 3
- Appraisals Requiring Conclusion 22
- Calls

Please select

## Activity List



- Sales Applicant Checklist 3
- Applicants Not Contacted 13
- Appraisal Checklist 3
- Appraisals Requiring Conclusion 22
- Calls Upcoming/Outstanding 16
- Keys Due Back 4
- Property 7

## Applicants Not Contacted x



	<input type="checkbox"/> Negotiator	Applicant	Phone
⋮	<input type="checkbox"/> David-George Morgan	Fern Harmon	07711445566
⋮	<input type="checkbox"/> David-George Morgan	Pennie Harmon	07711778899
⋮	<input type="checkbox"/> VTUK USER	Adrian Green	07863525458
⋮	<input type="checkbox"/> Training Dave	Judith Reeks	07531456123
⋮	<input type="checkbox"/> Training Dave	Robert Hick	07894123123
⋮	<input type="checkbox"/> David-George Morgan	Sales Applicant17	
⋮	<input type="checkbox"/> David-George Morgan	Sales Applicant18	
⋮	<input type="checkbox"/> Training Dave	Sales Applicant19	07852112163



## Activity List

	Sales Applicant Checklist	3	
	Applicants Not Contacted	13	
	Appraisal Checklist	3	
	Appraisals Requiring Conclusion	22	
	Calls Upcoming/Outstanding	16	
	Keys Due Back	4	
	Property Checklist	3	

Applicants Not Contacted ×

Appraisals Requiring Conclusion ×




	<input type="checkbox"/> Negotiator	Property
⋮	<input type="checkbox"/>	64 Blackthorn Drive, Hurworth, Darlington, DL2 2FU
⋮	<input type="checkbox"/> David-George Morgan	63 Woodland Road, Darlington, DL3 7BQ
⋮	<input type="checkbox"/> David-George Morgan	1 Verity Rise, Darlington, DL3 0YB
⋮	<input type="checkbox"/>	139 Manstone Avenue, Sidmouth, EX10 9TH
⋮	<input type="checkbox"/> David-George Morgan	97 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	<input type="checkbox"/>	9 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	<input type="checkbox"/>	8 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	<input type="checkbox"/>	8 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	<input type="checkbox"/>	55 Yew Tree Close, Hurworth, Darlington, DL2 2HX

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The Activities e.g. EPC Due, in the list will only show if there are entries to display, so an activity list item will not show if there is nothing to report.

Click here. The list of activities that are currently due will show. In this case Accounts (rents) Overdue.

PLEASE NOTE: the system will be unavailable from 0pm to 0pm (midnight) on 1st January for scheduled maintenance, during this time you will be unable to login.

My day
Lettings ▾
Sales ▾
Accounts ▾
Reporting ▾
Communications ▾




 My acc

### Activity List

- Tenancy Checklist 1
- Lettings Applicant Checklist 1
- Accounts Overdue 16
- Gas Safety Due 30
- Fixed Wiring (EICR) Due 7
- Fire Extinguishers Due 2
- Carbon Monoxide Due 2
- EPC Due 1

Please select an activity list item to begin

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Clicking onto the 3 dots will show a menu of options. From that menu a list of the options that are available will show. These options vary depending on the Activity list selected and will range from logging a call, view property or tenant records etc to collecting rent.

PLEASE NOTE: The system will be unavailable from 6pm to 8pm tonight (Tues 18th February) for scheduled maintenance, during this time you will be unab

**Activity List**

- Tenancy Checklist 1
- Lettings Applicant Checklist 1
- Accounts Overdue 16
- Gas Safety Due 30
- Fixed Wiring (EICR) Due 7
- Fire Extinguishers Due 2
- Carbon Monoxide Due 2
- EPC Due 1
- Appraisal Checklist 1

**Accounts Overdue**

Negotiator	Tenant	Guarantor	Property
<input type="checkbox"/> David-George Morgan	wilma morgan demo		63 Woodlanc
<input type="checkbox"/> David-George Morgan	Lettings applicant83		63 Woodlanc
<input type="checkbox"/> David-George Morgan	Lettings applicant30		92 Pelaw Cre
<input type="checkbox"/> David-George Morgan	Applicant41		63 Woodlanc
<input type="checkbox"/> Training Dave	Letting Applicant80		34 Kingsway,
<input type="checkbox"/> Training Dave	letti applicant	„ kk	749 Pelaw Cr
<input type="checkbox"/> Training Dave	Lettings Applicant88		122 Pelaw Cr
<input type="checkbox"/> David-George Morgan	Dick Blyton DM		17 Yew Tree C
<input type="checkbox"/> Training Dave	Letting Applicant107		771 Pelaw Cr

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The information varies from screen to screen. For example the Gas Safety list Shows information on the Negotiator looking after the property, the tenant, property address, guarantor, landlord, dates last contacted and management type

**Activity List**

- Tenancy Checklist 1
- Lettings Applicant Checklist 1
- Accounts Overdue 16
- Gas Safety Due 30
- Fixed Wiring (EICR) Due 7
- Fire Extinguishers Due 2
- Carbon Monoxide Due 2
- EPC Due 1
- Appraisal Checklist 1
- Appraisals Requiring Conclusion 22

**Accounts Overdue**

Negotiator	Tenant	Guarantor	Property
<input checked="" type="checkbox"/> David-George Morgan	wilma morgan demo		63 Woodlanc
<input type="checkbox"/> David-George Morgan	Lettings applicant83		63 Woodlanc
<input checked="" type="checkbox"/> Training Dave	Lettings applicant30		92 Pelaw Cre
<input type="checkbox"/> David-George Morgan	Applicant41		63 Woodlanc
<input checked="" type="checkbox"/> Training Dave	Letting Applicant80		34 Kingsway,
<input type="checkbox"/> Training Dave	letti applicant	„ kk	749 Pelaw Cr
<input type="checkbox"/> Training Dave	Lettings Applicant88		122 Pelaw Cr
<input type="checkbox"/> David-George Morgan	Dick Blyton DM		17 Yew Tree C
<input type="checkbox"/> Training Dave	Letting Applicant107		771 Pelaw Cr
<input type="checkbox"/> Training Dave	Lettings Applicant32		63 Kingsway,





Accounts Overdue × Gas Safety Due ×

Search

	Landlord	Due Date ↑	Last Contacted	Management Type	Responsibility
⋮ gton DL3 7BQ	Arthur Morgan	25/04/2023	11/02/2025 12:49	Fully Managed	Agent
⋮ erdale, Darlington DL3 0GA	Gandalf Grey	26/04/2023	01/05/2024 14:09	Fully Managed	Agent
⋮ th, Darlington DL2 2HX	Gandalf Grey	04/05/2023	01/05/2024 14:09	Fully Managed	Contractor
⋮ n DL3 8NW	Eve Harmon	16/05/2023	11/02/2025 12:49	Fully Managed	Agent
⋮ ar le Street DH2 2HX	Villegas	28/11/2023	19/07/2024 12:18	Fully Managed	Agent
⋮ ar le Street DH2 2HX	Villegas	28/11/2023	19/07/2024 12:18	Fully Managed	Agent
⋮ th, Darlington DL2 2HX	Landlord4	11/01/2024	08/01/2025 16:06	Fully Managed	Agent
⋮ L1 3EY	Letting Landlord	29/03/2024	06/02/2025 15:05	Fully Managed	Contractor
⋮ ar le Street DH2 2HX	Lattings Landlord35	30/03/2024	06/02/2025 15:05	Fully Managed	Agent
⋮ n DL3 8LA	Adrian Green	30/03/2024	11/02/2025 12:49	Fully Managed	Agent

1 to 10 of 30 Page 1 of 3

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A message can be sent to all or some of the entries in a list. Click the checkbox beside the contact you want to send the message to.

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iam property My day Lettings Sales Accounts Reporting Communications

Activity List

- Tenancy Checklist 1
- Lettings Applicant Checklist 1
- Accounts Overdue 16
- Gas Safety Due 30
- Fixed Wiring (EICR) Due 7
- Fire Extinguishers Due 2
- Carbon Monoxide Due 2
- EPC Due 1
- Appraisal Checklist 1

Accounts Overdue ×

⋮

<input type="checkbox"/> Negotiator	Tenant	Guarantor	Property
<input checked="" type="checkbox"/> David-George Morgan	wilma morgan demo		63 Woodlanc
<input type="checkbox"/> David-George Morgan	Lettings applicant83		63 Woodlanc
<input type="checkbox"/> Training Dave	Lettings applicant30		92 Pelaw Cre
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<input type="checkbox"/> Training Dave	Letting Applicant80		34 Kingsway,
<input type="checkbox"/> Training Dave	letti applicant	„ kk	749 Pelaw Cr
<input type="checkbox"/> Training Dave	Lettings Applicant88		122 Pelaw Cr
<input type="checkbox"/> David-George Morgan	Dick Blyton DM		17 Yew Tree C
<input type="checkbox"/> Training Dave	Letting Applicant107		771 Pelaw Cr

## Activity List



	Tenancy Checklist	1	
	Lettings Applicant Checklist	1	
	Accounts Overdue	16	
	Gas Safety Due	30	
	Fixed Wiring (EICR) Due	7	
	Fire Extinguishers Due	2	
	Carbon Monoxide Due	2	
	EPC Due	1	
	Appraisal Checklist	1	
	Appraisals Requiring	22	

## Accounts Overdue



	Negotiator	Tenant	Guarantor	Property
	<input checked="" type="checkbox"/> David-George Morgan	wilma morgan demo		63 Woodlanc
	<input type="checkbox"/> David-George Morgan	Lettings applicant83		63 Woodlanc
	<input checked="" type="checkbox"/> Training Dave	Lettings applicant30		92 Pelaw Cre
	<input type="checkbox"/> David-George Morgan	Applicant41		63 Woodlanc
	<input type="checkbox"/> Training Dave	Letting Applicant80		34 Kingsway,
	<input type="checkbox"/> Training Dave	letti applicant	„ kk	749 Pelaw Cr
	<input type="checkbox"/> Training Dave	Lettings Applicant88		122 Pelaw Cr
	<input type="checkbox"/> David-George Morgan	Dick Blyton DM		17 Yew Tree C
	<input type="checkbox"/> Training Dave	Letting Applicant107		771 Pelaw Cr
	<input type="checkbox"/> Training Dave	Lettings Applicant32		63 Kingsway,

## Activity List



	Tenancy Checklist	1	
	Lettings Applicant Checklist	1	
	Accounts Overdue	16	
	Gas Safety Due	30	
	Fixed Wiring (EICR) Due	7	
	Fire Extinguishers Due	2	
	Carbon Monoxide Due	2	
	EPC Due	1	
	Appraisal Checklist	1	
	Appraisals Requiring Conclusion	22	
	Fire Alarm Due	1	

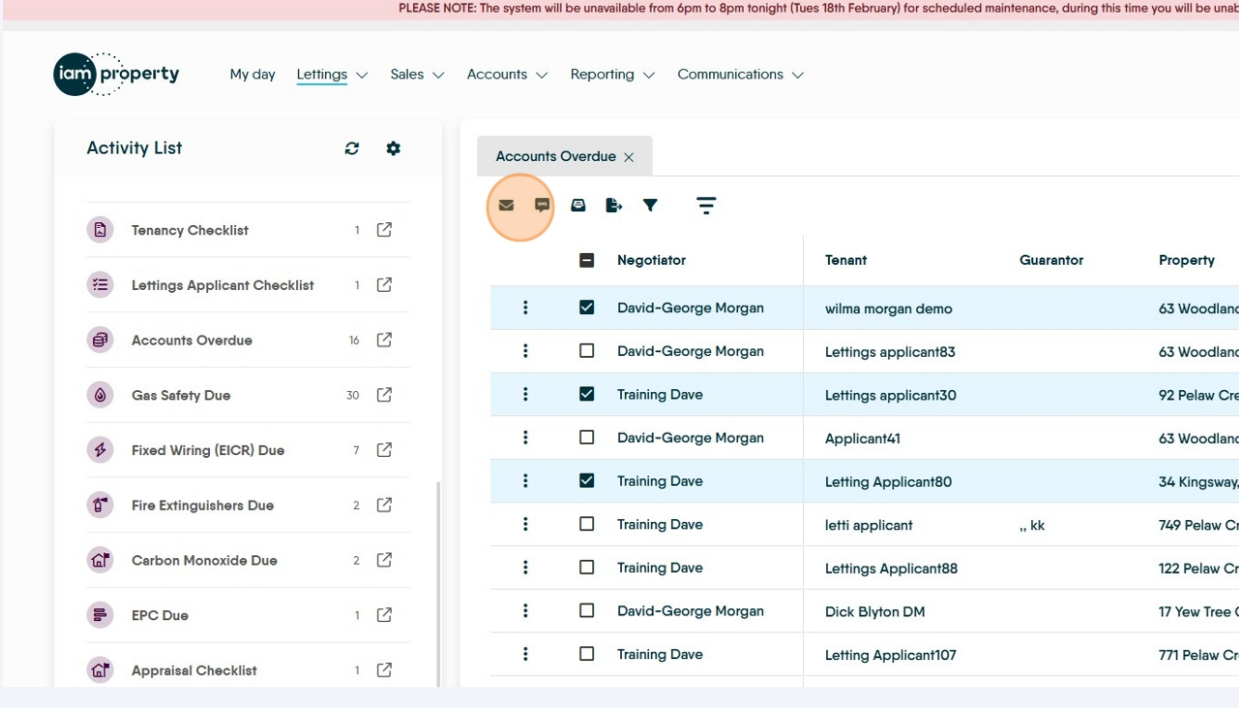
## Accounts Overdue



	Negotiator	Tenant	Guarantor	Property
	<input checked="" type="checkbox"/> David-George Morgan	wilma morgan demo		63 Woodlanc
	<input type="checkbox"/> David-George Morgan	Lettings applicant83		63 Woodlanc
	<input checked="" type="checkbox"/> Training Dave	Lettings applicant30		92 Pelaw Cre
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	<input type="checkbox"/> Training Dave	Lettings Applicant32		63 Kingsway,

## 16 Click here to pick what type of message is sent, Email, SMS or Letter are available.

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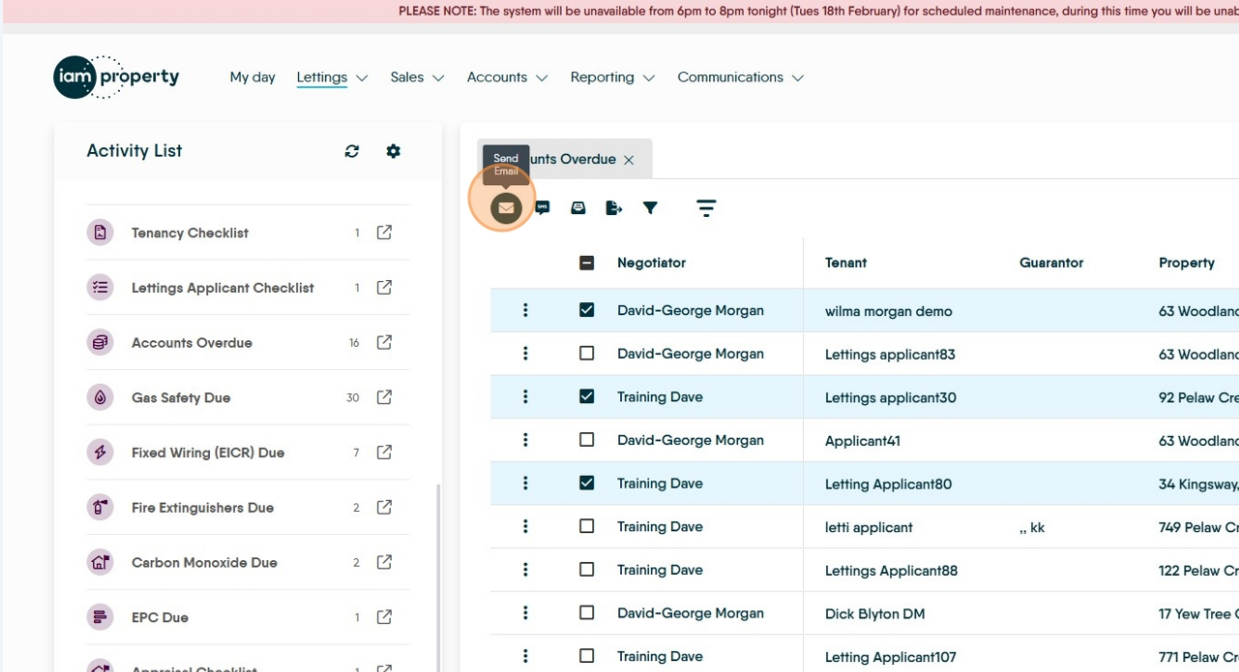


The screenshot shows the 'ian property' dashboard with a navigation bar including 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the left is an 'Activity List' with items like 'Tenancy Checklist', 'Lettings Applicant Checklist', 'Accounts Overdue', 'Gas Safety Due', 'Fixed Wiring (EICR) Due', 'Fire Extinguishers Due', 'Carbon Monoxide Due', 'EPC Due', and 'Appraisal Checklist'. The main area displays the 'Accounts Overdue' table. A red circle highlights the message type icons (Email, SMS, Letter) in the top left of the table header.

Negotiator	Tenant	Guarantor	Property
<input checked="" type="checkbox"/> David-George Morgan	wilma morgan demo		63 Woodlanc
<input type="checkbox"/> David-George Morgan	Lettings applicant83		63 Woodlanc
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<input type="checkbox"/> David-George Morgan	Dick Blyton DM		17 Yew Tree C
<input type="checkbox"/> Training Dave	Letting Applicant107		771 Pelaw Cr

## 17 Using email as an example. Click here.

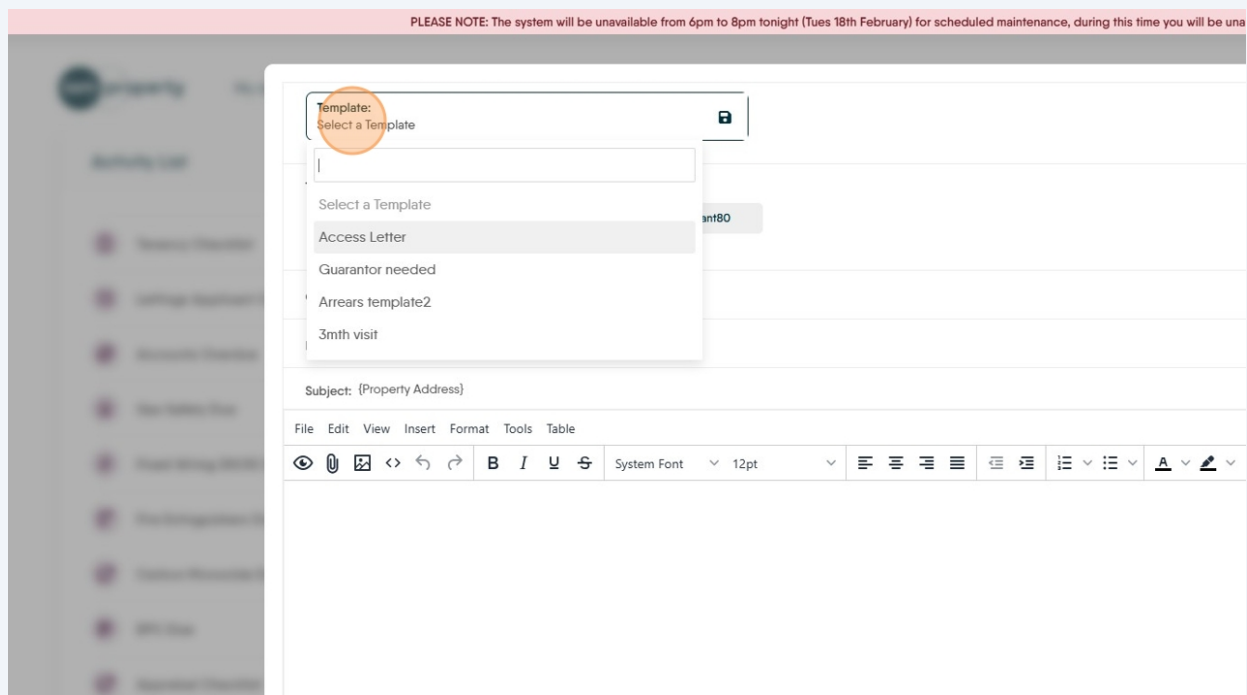
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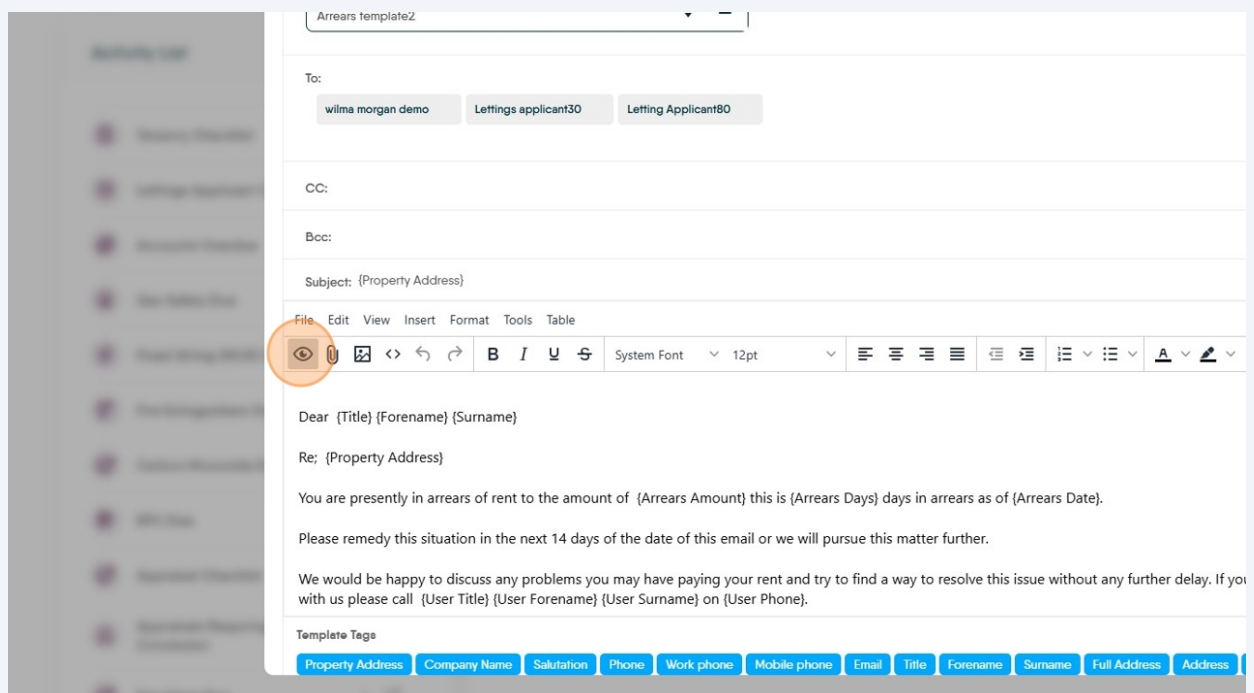
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Negotiator	Tenant	Guarantor	Property
<input checked="" type="checkbox"/> David-George Morgan	wilma morgan demo		63 Woodlanc
<input type="checkbox"/> David-George Morgan	Lettings applicant83		63 Woodlanc
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<input type="checkbox"/> Training Dave	Letting Applicant107		771 Pelaw Cr

## 18 Click "Select a Template" and select a template (if there are any created)



## 19 This will then populate the screen with the template text. Clicking on the 'eye' icon will show what the completed message will look like, using the data from the first contact



## 20 Click "Send Email" to send the message to all recipients

The screenshot shows an email composition interface. At the top, there are fields for 'Bcc:' and 'Subject: {Property Address}'. Below these is a menu bar with 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', and 'Table'. A rich text toolbar follows, containing icons for undo, redo, bold, italic, underline, link, text color, background color, and list creation. The email body contains the following text:

Dear {Title} {Forename} {Surname}

Re: {Property Address}

You are presently in arrears of rent to the amount of {Arrears Amount} this is {Arrears Days} days in arrears as of {Arrears Date}.

Please remedy this situation in the next 14 days of the date of this email or we will pursue this matter further.

We would be happy to discuss any problems you may have paying your rent and try to find a way to resolve this issue without any further delay. If you would like to speak with us please call {User Title} {User Forename} {User Surname} on {User Phone}.

Below the text is a 'Template Tags' section with a grid of buttons for inserting merge fields:

Property Address	Company Name	Salutation	Phone	Work phone	Mobile phone	Email	Title	Forename	Surname	Full Address	Address	Town	Postcode
Arrears Amount	Arrears Date	Arrears Days	Branch Name	Branch Phone 1	Branch Phone 2	Branch Email	Branch Fax	Branch Property No	Branch Address 1				
Branch Address 2	Branch Town	Branch County	Branch Postcode	Branch Logo URL	User Title	User Forename	User Surname	User Phone	User Work Phone	User Email			
User Mobile	User Company	User Job Title											

At the bottom of the email body is a large orange button labeled 'Send Email' with a right-pointing arrow.



Tip! This is a Mail Merge, each recipient will receive a personalised email to them and will not see the contact data for the other recipients. This allows for a quick and easy way of contacting and informing multiple contacts at one time

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Sending a SMS.

Select the contacts to send the message to and click the SMS icon, select a template (if created). Click template. The final message can be checked on the left side of the screen. Click send.



My day Lettings Sales Accounts Reporting Communications

### Activity List

Tenancy Checklist	1	
Lettings Applicant Checklist	1	
Accounts Overdue	16	
Gas Safety Due	30	
Fixed Wiring (EICR) Due	7	
Fire Extinguishers Due	2	
Carbon Monoxide Due	2	
EPC Due	1	
Appraisal Checklist	1	

Accounts Overdue x Gas Safety Due x



	Negotiator	Property	
<input checked="" type="checkbox"/>	David-George Morgan	63 Woodland Road, Darlington DL3 7BQ	Ar
<input checked="" type="checkbox"/>	David-George Morgan	Flat 89 Alverton Drive, Faverdale, Darlington DL3 0GA	Gi
<input checked="" type="checkbox"/>	David-George Morgan	17 Yew Tree Close, Hurworth, Darlington DL2 2HX	Gi
<input checked="" type="checkbox"/>	David-George Morgan	1 Spruce Grove, Darlington DL3 8NW	Ev
<input checked="" type="checkbox"/>	Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Vil
<input type="checkbox"/>	Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Vil
<input type="checkbox"/>	Training Dave	16 Yew Tree Close, Hurworth, Darlington DL2 2HX	La
<input type="checkbox"/>	Training Dave	69 Kingsway, Darlington DL1 3EY	Le
<input type="checkbox"/>	Training Dave	71 Pelaw Crescent, Chester le Street DH2 2HX	La

EASE NOTE: The system will be unavailable from 6pm to 8pm tonight (Tues 18th February) for scheduled maintenance, during this time you will be unable to login.

From:

SMS Merge ?

Arthur Morgan Gandalf Grey Gandalf Grey Eve Harmon Villegas

Sender Message Template

SMS Gas Safety

New Template Name...

Template Tags

Property Address Company Name Agreement Name Salutation Phone Work phone  
Mobile phone Email Title Forename Surname Full Address Address Town  
Postcode Branch Name Branch Phone 1 Branch Phone 2 Branch Email Branch Fax

Send Message



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**SMS Merge**

From: Arthur Morgan, Gandalf Grey, Eve Harmon, Villegas

Sender: [Dropdown]

Message Template: SMS Gas Safety

{Forename} {Surname} we will be shortly arranging the annual Gas Safety check at {Full Address}

Any Issues contact us @ {Branch Phone 1} {Branch Name}

New Template Name...

Template Tags

Property Address, Company Name, Agreement Name, Salutation, Phone, Work phone, Mobile phone, Email, Title, Forename, Surname, Full Address, Address, Town, Postcode, Branch Name, Branch Phone 1, Branch Phone 2, Branch Email, Branch Fax

**Send Message**

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To export the list to CSV click here. The document will be saved to the Downloads folder of your computer.

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**Accounts Overdue**

Export to CSV

Negotiator	Property	Status
David-George Morgan	63 Woodland Road, Darlington DL3 7BQ	Ar
David-George Morgan	Flat 89 Alverton Drive, Faverdale, Darlington DL3 0GA	Gi
David-George Morgan	17 Yew Tree Close, Hurworth, Darlington DL2 2HX	Gi
David-George Morgan	1 Spruce Grove, Darlington DL3 8NW	Ev
Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Vil
Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Vil
Training Dave	16 Yew Tree Close, Hurworth, Darlington DL2 2HX	La
Training Dave	69 Kingsway, Darlington DL1 3EY	Le
Training Dave	71 Pelaw Crescent, Chester le Street DH2 2HX	La

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To send a letter, Select the recipients of the message, click the Letter icon. Click "Select letter template" to select the letter you want to send and then if sending the letter via email Click "Email as Attachment".

Click here to add a message template. Click "Email Subject" and add the subject line for the template. Click "Perform Merge" this will create the letter, attach it to an email and send to the selected recipients.

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**iam property** My day Lettings Sales Accounts Reporting Communications

### Activity List

- Carbon Monoxide Due 2
- EPC Due 1
- Appraisal Checklist 1
- Appraisals Requiring Conclusion 22
- Fire Alarm Due 1
- Portal Enquiries 17
- Smoke Alarms Due 7

### Accounts Overdue

Negotiator	Tenant	Guarantor	Property
<input checked="" type="checkbox"/> David-George Morgan	wilma morgan demo		63 Woodlan
<input type="checkbox"/> David-George Morgan	Lettings applicant83		63 Woodlan
<input checked="" type="checkbox"/> Training Dave	Lettings applicant30		92 Pelaw Cre
<input type="checkbox"/> David-George Morgan	Applicant41		63 Woodlan
<input checked="" type="checkbox"/> Training Dave	Letting Applicant80		34 Kingsway
<input type="checkbox"/> Training Dave	letti applicant	„ kk	749 Pelaw C

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### Generate Letters

Letters  
Select letter template

Open PDF

Download Word document

Email as Attachment

Document(s) will be opened in a new tab

Cancel

Perform Merge



