

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>

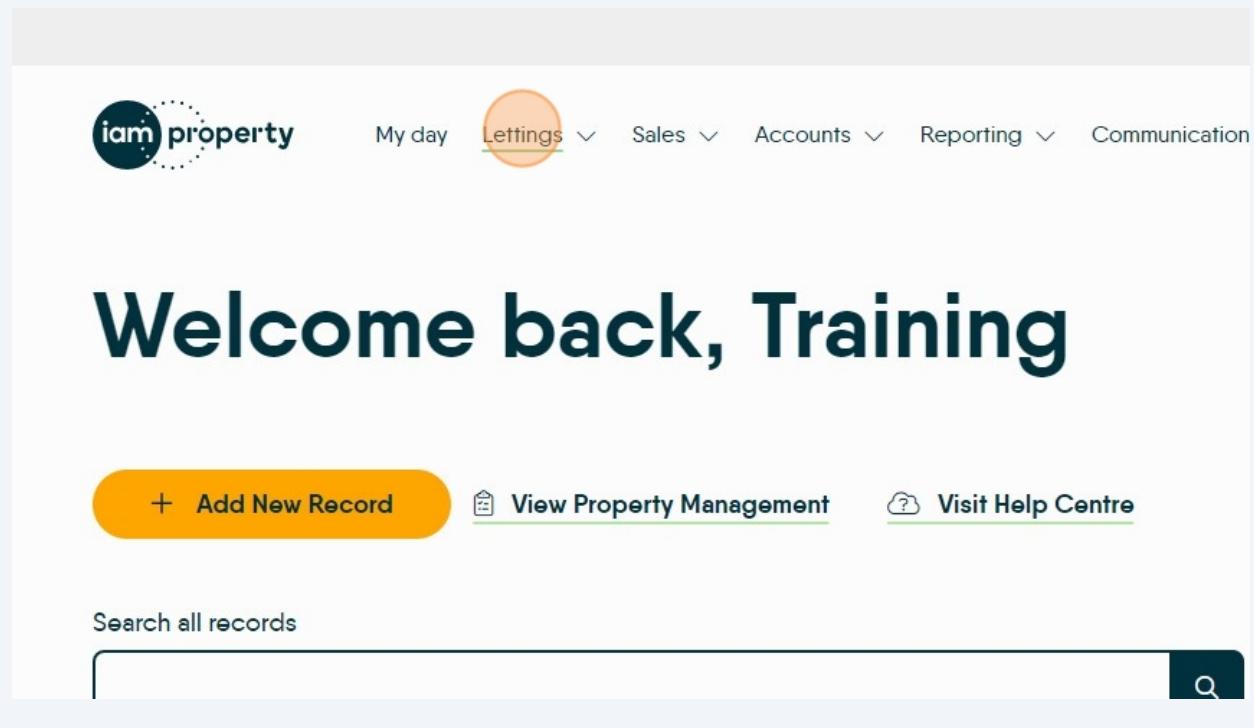
Accessing Lettings (or Sales) Dashboards and Activity Lists

 For this guide we will use the Lettings Dashboard.

2

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.

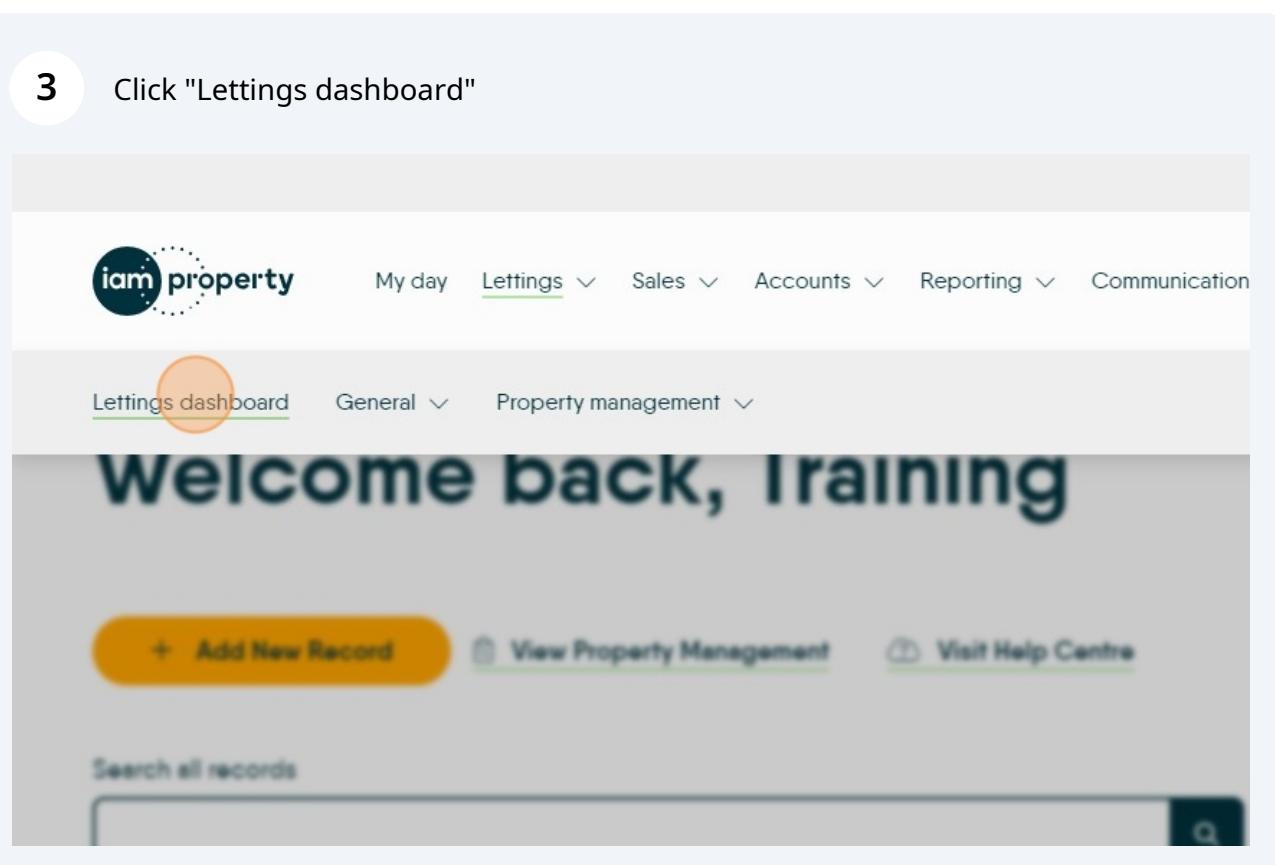
To access the Lettings dashboard. Click "Lettings"



The screenshot shows the iamproperty software interface. At the top, there is a navigation bar with the 'iamproperty' logo on the left and menu items: 'My day', 'Lettings' (which is highlighted with an orange circle), 'Sales', 'Accounts', 'Reporting', and 'Communication'. Below the navigation bar, a large, bold, dark blue header says 'Welcome back, Training'. Underneath the header, there is a yellow button with a plus sign and the text 'Add New Record', a blue button with a house icon and the text 'View Property Management', and a blue button with a question mark icon and the text 'Visit Help Centre'. At the bottom of the interface, there is a search bar with the placeholder 'Search all records' and a magnifying glass icon.

3

Click "Lettings dashboard"



The screenshot shows the iamproperty software interface, similar to the previous one but with a different layout. At the top, there is a navigation bar with the 'iamproperty' logo on the left and menu items: 'My day', 'Lettings' (which is highlighted with an orange circle), 'Sales', 'Accounts', 'Reporting', and 'Communication'. Below the navigation bar, the 'Lettings dashboard' is selected, indicated by an orange circle. There are two dropdown menus: 'General' and 'Property management'. A large, bold, dark blue header says 'Welcome back, Training'. Below the header, there is a yellow button with a plus sign and the text 'Add New Record', a blue button with a house icon and the text 'View Property Management', and a blue button with a question mark icon and the text 'Visit Help Centre'. At the bottom of the interface, there is a search bar with the placeholder 'Search all records' and a magnifying glass icon.

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

The image displays two screenshots of the iam property software interface, illustrating the steps to access the Sales Dashboard.

Top Screenshot (Main Dashboard):

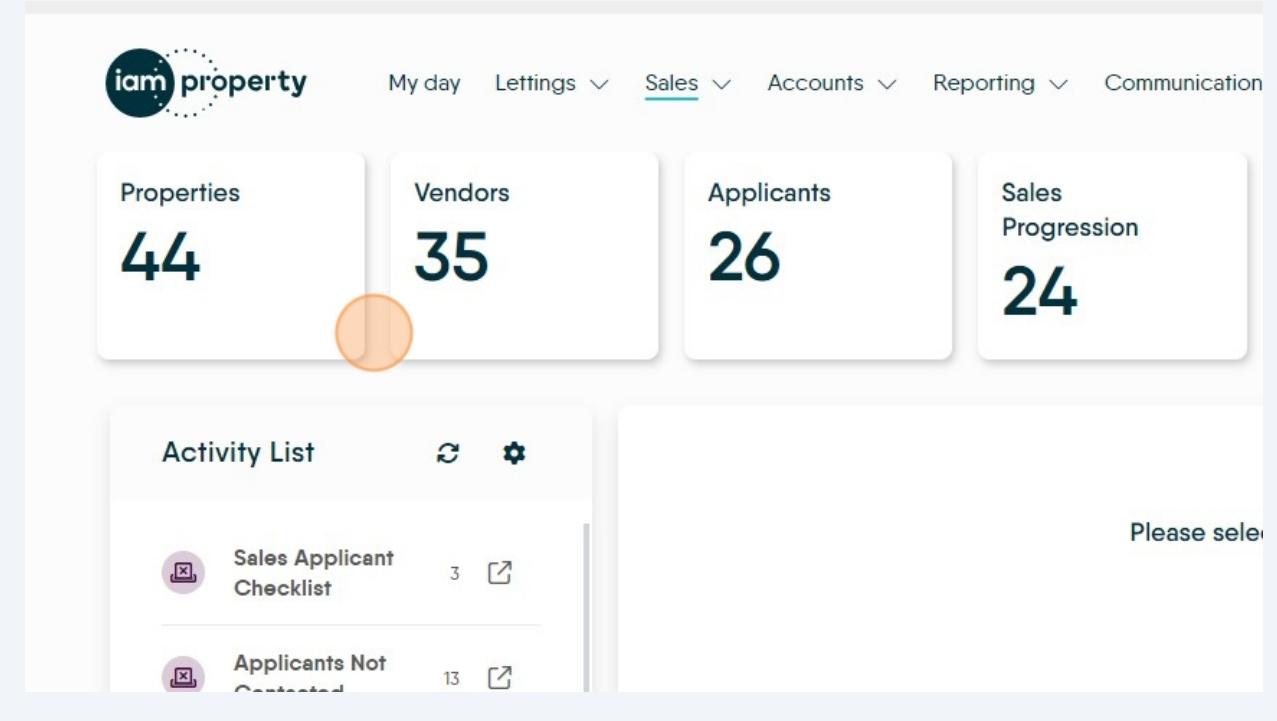
- Header: iam property, My day, Lettings, Sales (highlighted with an orange circle), Accounts, Reporting, Communications.
- Metrics (Cards):
 - Properties: 73
 - Landlords: 49
 - Tenants: 52
 - Applicants: 10
- Activity List: Deposits Requiring Registration (4 items, with a dropdown arrow).
- Right side: Please select.

Bottom Screenshot (Sales Dashboard):

- Header: iam property, My day, Lettings, Sales (highlighted with an orange circle), Accounts, Reporting, Communication.
- Section: Sales
- Options:
 - Sales Dashboard (highlighted with an orange circle)
 - Properties
 - Vendors
 - Applicants
 - Property Match
 - Applicant Match
 - Reports
 - Marketing toolkit

5 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.



Properties **44**

Vendors **35**

Applicants **26**

Sales Progression **24**

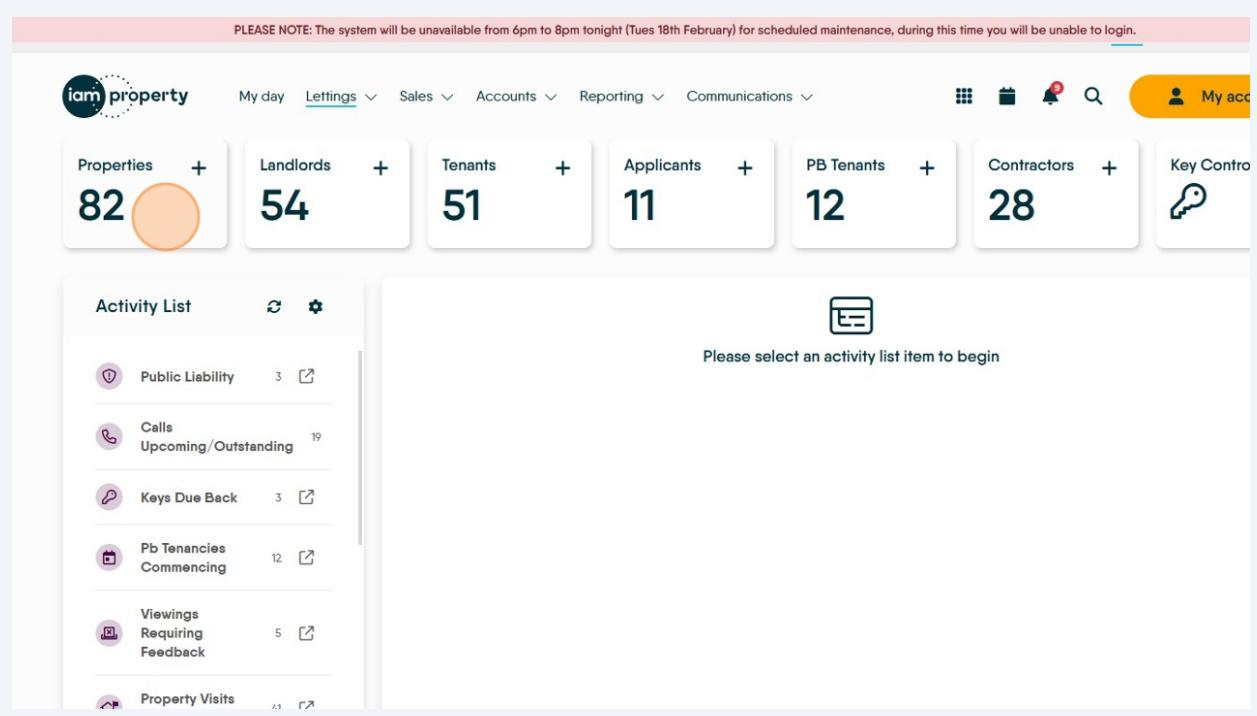
Activity List

Sales Applicant Checklist 3

Applicants Not Contacted 13

Please select an activity list item to begin

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



Properties **82**

Landlords **54**

Tenants **51**

Applicants **11**

PB Tenants **12**

Contractors **28**

Key Control **1**

Activity List

Public Liability 3

Calls Upcoming/Outstanding 19

Keys Due Back 3

Pb Tenancies Commencing 12

Viewings Requiring Feedback 5

Property Visits 13

Please select an activity list item to begin

7

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.

My day Lettings Sales Accounts Reporting Communications My account

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

8

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
774 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	1,300 PCM	Chester le Street	landlord55	
1091 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	1,200 PCM	Chester le Street	Lettings landlord99	
228 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX	1,500 PCM	Darlington	Arthur Morgan	
suspense Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX	0	Darlington	David-George Morgan	
806 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	0	Chester le Street	Letting Landlord	
735 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	0	Chester le Street	Landlord5	
759 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX	1,400 PCM	Chester le Street	letting landlord34	

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 😊

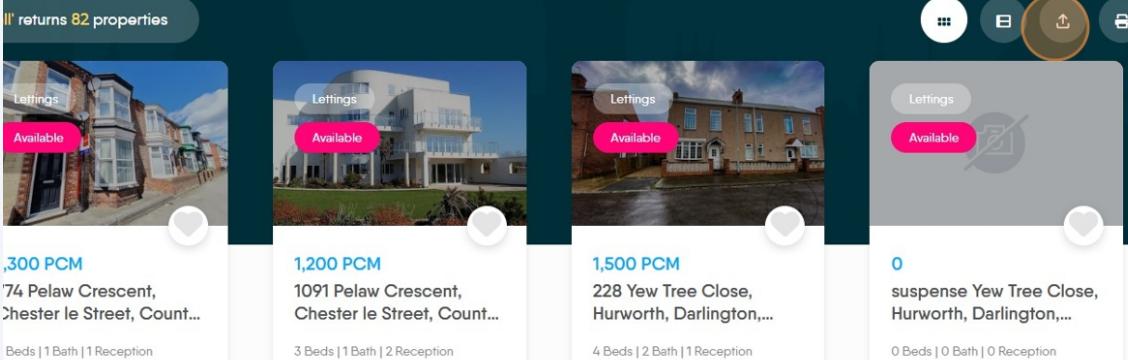
Properties 82 Landlords Tenants Lettings Applicants Contractors Guarantors Sales Properties Vendors Sales Applicants Solicitors

ompliance

Available Let Agreed Appraisal Archived

Search Export to CSV

It returns 82 properties



Price	Address	Bedrooms	Bathrooms	Receptions
£300 PCM	74 Pelaw Crescent, Chester le Street, Count...	1	1	1
£1,200 PCM	1091 Pelaw Crescent, Chester le Street, Count...	3	1	2
£1,500 PCM	228 Yew Tree Close, Hurworth, Darlington,...	4	2	1
£0	suspense Yew Tree Close, Hurworth, Darlington,...	0	0	0

9

The property lists can be exported as a CSV or printed to PDF
[Click here.](#)

ore your lettings properties

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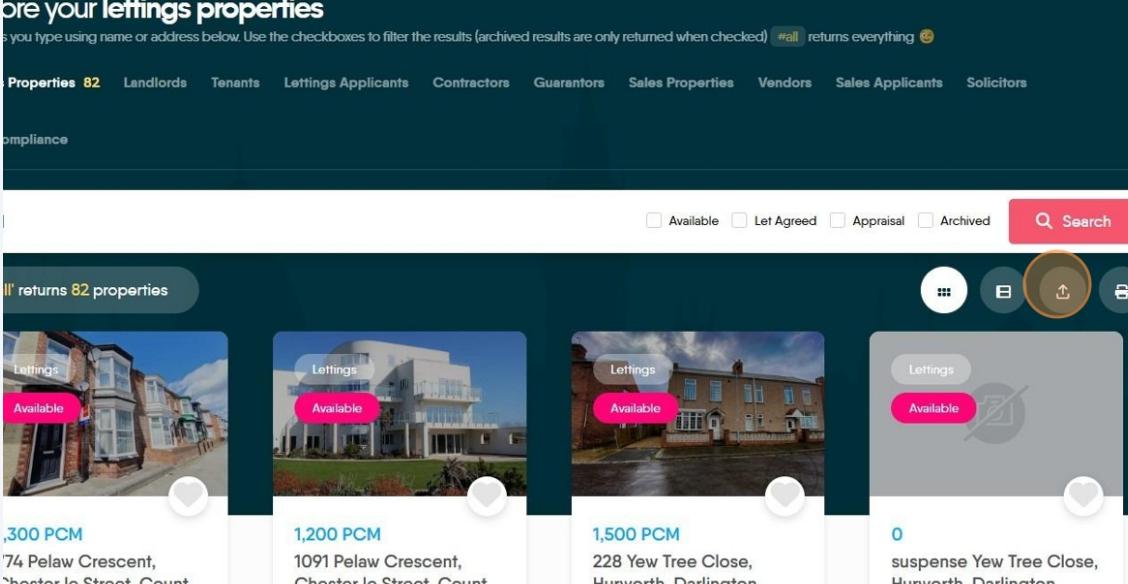
Properties 82 Landlords Tenants Lettings Applicants Contractors Guarantors Sales Properties Vendors Sales Applicants Solicitors

ompliance

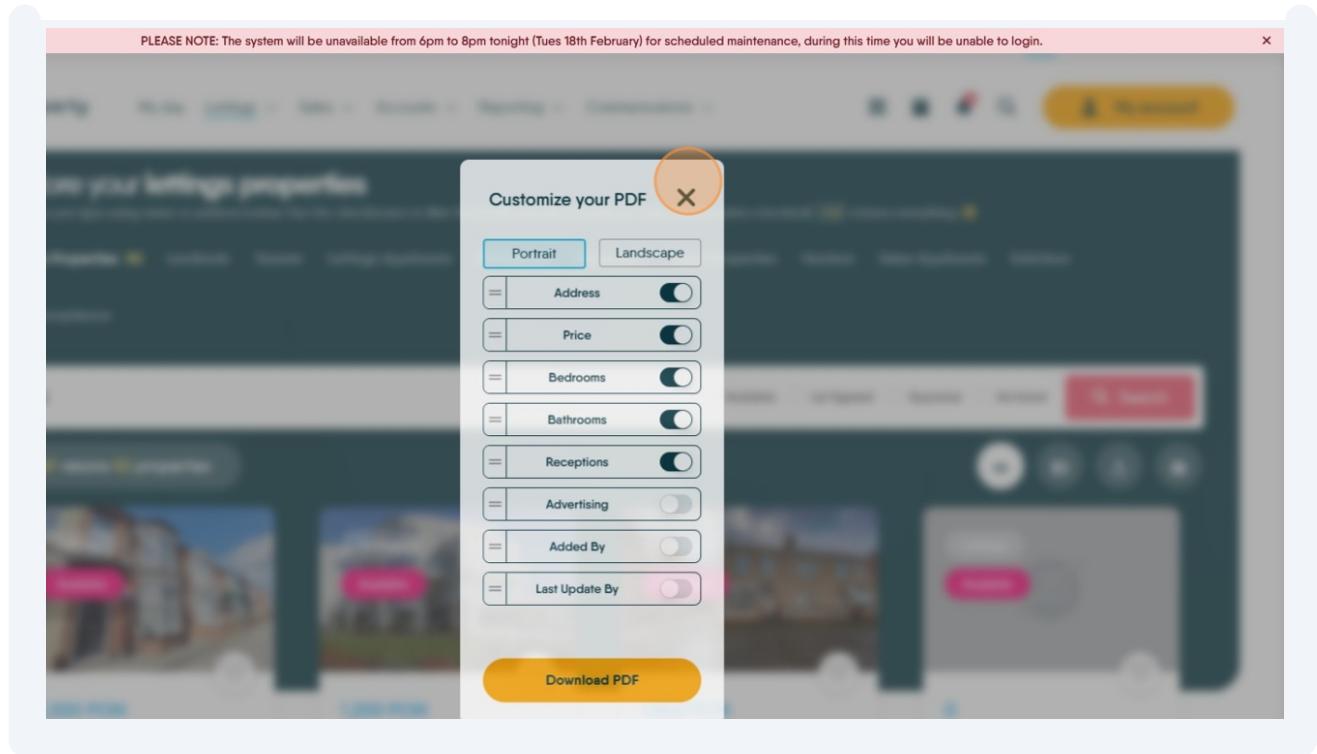
Available Let Agreed Appraisal Archived

Search Export to CSV

It returns 82 properties



Price	Address	Bedrooms	Bathrooms	Receptions
£300 PCM	74 Pelaw Crescent, Chester le Street, Count...	1	1	1
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£1,500 PCM	228 Yew Tree Close, Hurworth, Darlington,...	4	2	1
£0	suspense Yew Tree Close, Hurworth, Darlington,...	0	0	0

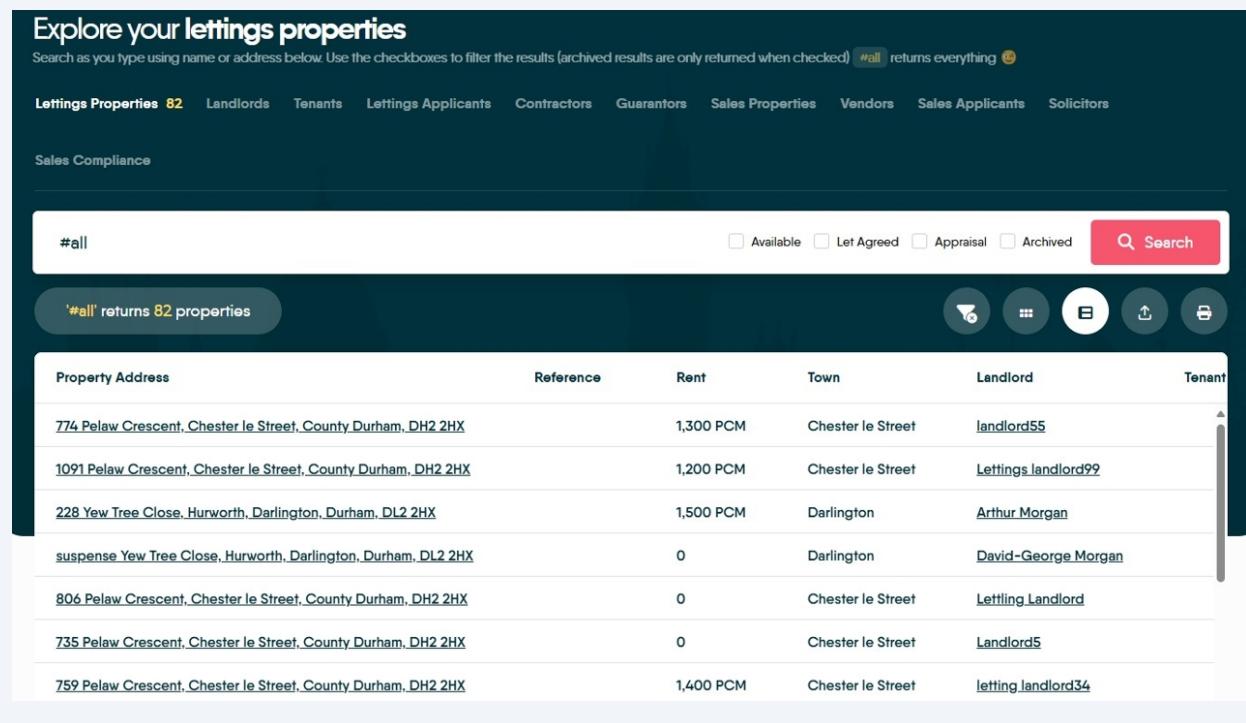


10 Using the Property List as an example.

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.



The screenshot shows a search interface for 'Lettings Properties'. The search bar contains the text '#all'. Below the search bar are several filter checkboxes: 'Available', 'Let Agreed', 'Appraisal', and 'Archived'. To the right of the search bar is a red 'Search' button with a magnifying glass icon. Below the search bar, a message says "'#all' returns 82 properties'. The main area is a table with the following columns: 'Property Address', 'Reference', 'Rent', 'Town', 'Landlord', and 'Tenant'. The table lists 82 properties, each with a unique address, reference number, rent amount, town, and landlord. Landlord names are underlined, indicating they are clickable links. The table has a vertical scrollbar on the right side.

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

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.

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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		Please select
Applicants Not Contacted	13		
Appraisal Checklist	3		
Appraisals Requiring Conclusion	22		
Calls	16		

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

<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	

The screenshot shows two main sections. On the left, the 'Activity List' is displayed with the following items:

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

The 'Keys Due Back' item is highlighted with an orange circle. On the right, the 'Appraisals Requiring Conclusion' section is shown with a table:

	Negotiator	Property
⋮	⋮	64 Blackthorn Drive, Hurworth, Darlington, DL2 2FU
⋮	⋮	63 Woodland Road, Darlington, DL3 7BQ
⋮	⋮	1 Verity Rise, Darlington, DL3 0YB
⋮	⋮	139 Manstone Avenue, Sidmouth, EX10 9TH
⋮	⋮	97 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	⋮	9 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	⋮	8 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	⋮	8 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	⋮	55 Yew Tree Close, Hurworth, Darlington, DL2 2HX

12 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.

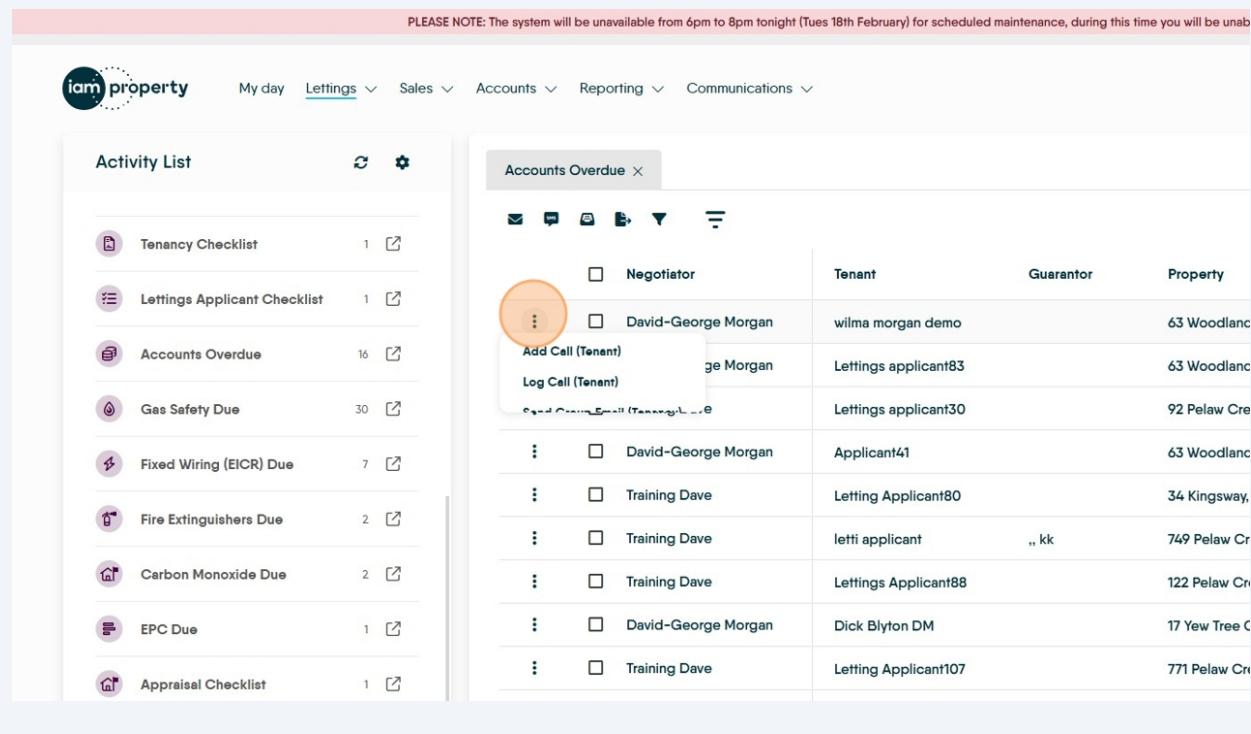
The screenshot shows the 'Activity List' section with the following items:

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

The 'Accounts Overdue' item is highlighted with an orange circle. To the right, there is a message: 'Please select an activity list item to begin' with a small icon.

13

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.



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Activity List

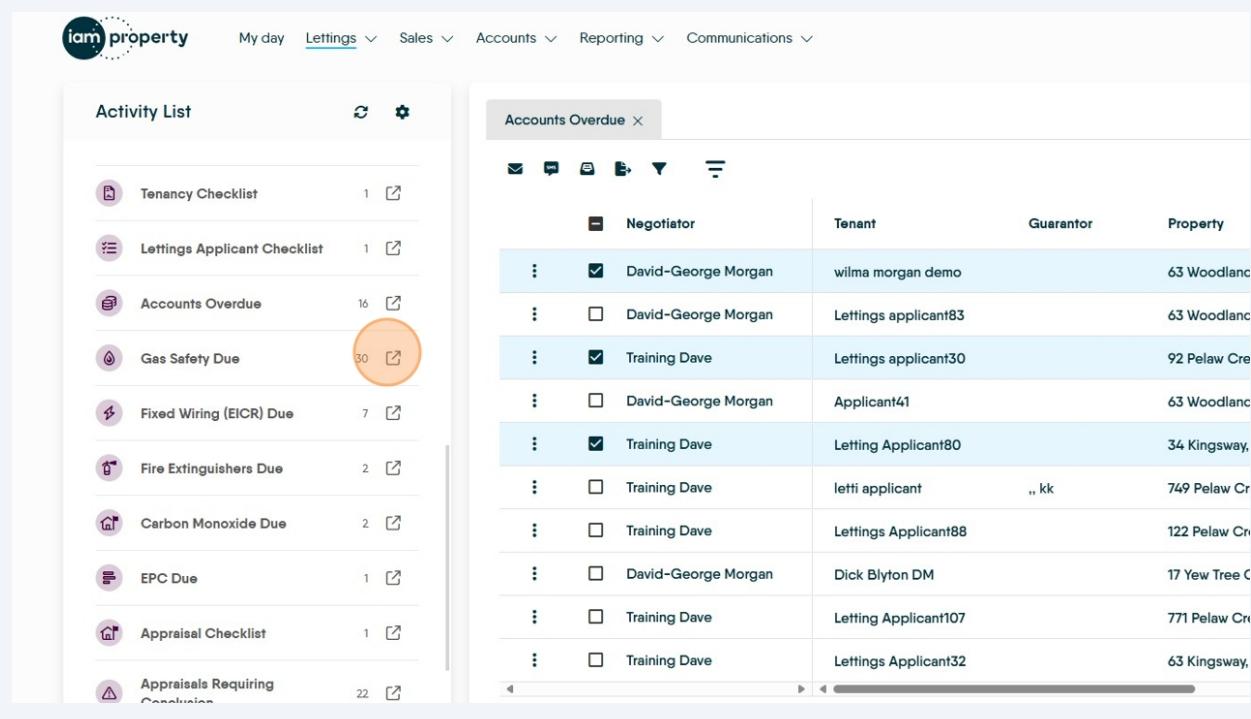
- Tenancy Checklist
- Lettings Applicant Checklist
- Accounts Overdue
- Gas Safety Due
- Fixed Wiring (EICR) Due
- Fire Extinguishers Due
- Carbon Monoxide Due
- EPC Due
- Appraisal Checklist

Accounts Overdue

Negotiator	Tenant	Guarantor	Property
<input type="checkbox"/> Negotiator	wilma morgan demo		63 Woodlanc
<input type="checkbox"/> David-George Morgan	ge Morgan	Lettings applicant83	63 Woodlanc
<input type="checkbox"/> Add Cell (Tenant)		Lettings applicant30	92 Pelaw Cre
<input type="checkbox"/> Log Cell (Tenant)			
<input type="checkbox"/> Send Reminding Email (Tenant)			
<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

14

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



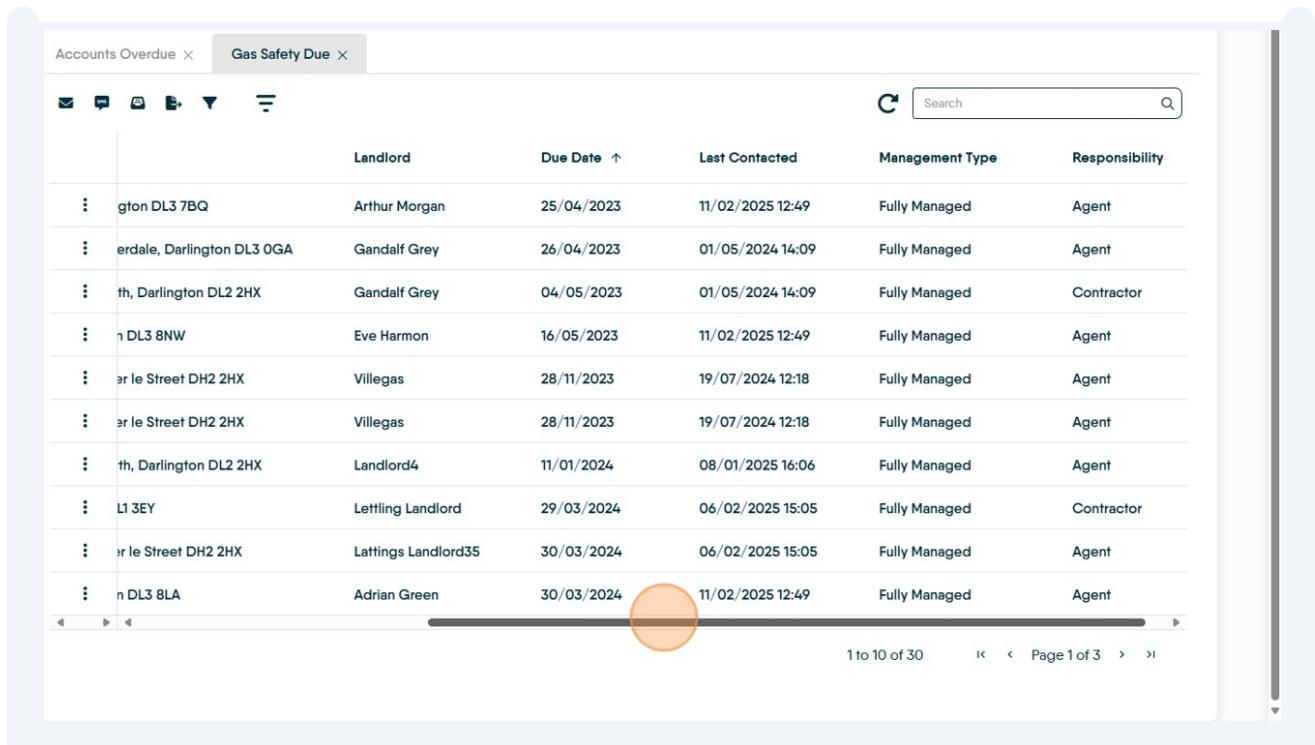
Activity List

- Tenancy Checklist
- Lettings Applicant Checklist
- Accounts Overdue
- Gas Safety Due
- Fixed Wiring (EICR) Due
- Fire Extinguishers Due
- Carbon Monoxide Due
- EPC Due
- Appraisal Checklist
- Appraisals Requiring Finalisation

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,

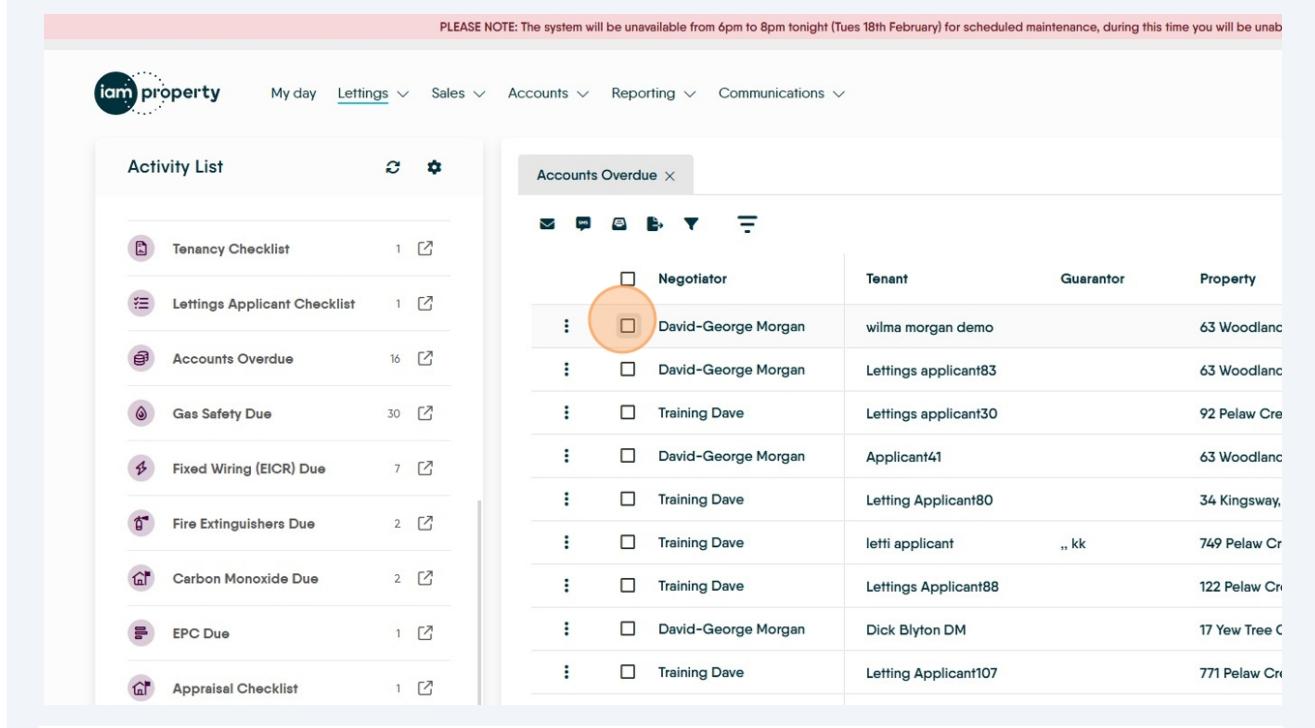
Checklist		1	<input type="checkbox"/>	Negotiator	Property	Landlord	Due
Applicant Checklist		1	<input type="checkbox"/>	David-George Morgan	63 Woodland Road, Darlington DL3 7BQ	Arthur Morgan	25/01/2024
Overdue		16	<input type="checkbox"/>	David-George Morgan	Flat 89 Alverton Drive, Faverdale, Darlington DL3 0GA	Gandalf Grey	26/01/2024
Due		30	<input type="checkbox"/>	David-George Morgan	17 Yew Tree Close, Hurworth, Darlington DL2 2HX	Gandalf Grey	04/02/2024
g (EICR) Due		7	<input type="checkbox"/>	David-George Morgan	1 Spruce Grove, Darlington DL3 8NW	Eve Harmon	16/02/2024
Advertisers Due		2	<input type="checkbox"/>	Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Villegas	28/01/2024
Carbon Monoxide Due		2	<input type="checkbox"/>	Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Villegas	28/01/2024
Checklist		1	<input type="checkbox"/>	Training Dave	16 Yew Tree Close, Hurworth, Darlington DL2 2HX	Landlord4	11/02/2024
Gas Safety Due		1	<input type="checkbox"/>	Training Dave	69 Kingsway, Darlington DL1 3EY	Letting Landlord	29/01/2024
Requiring Inspection		22	<input type="checkbox"/>	Training Dave	71 Pelaw Crescent, Chester le Street DH2 2HX	Lettings Landlord35	30/01/2024
Due		1	<input type="checkbox"/>	Training Dave	15 Barrett Road, Darlington DL3 8LA	Adrian Green	30/01/2024



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

15

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.



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"/> 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

Activity List

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

Accounts Overdue

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

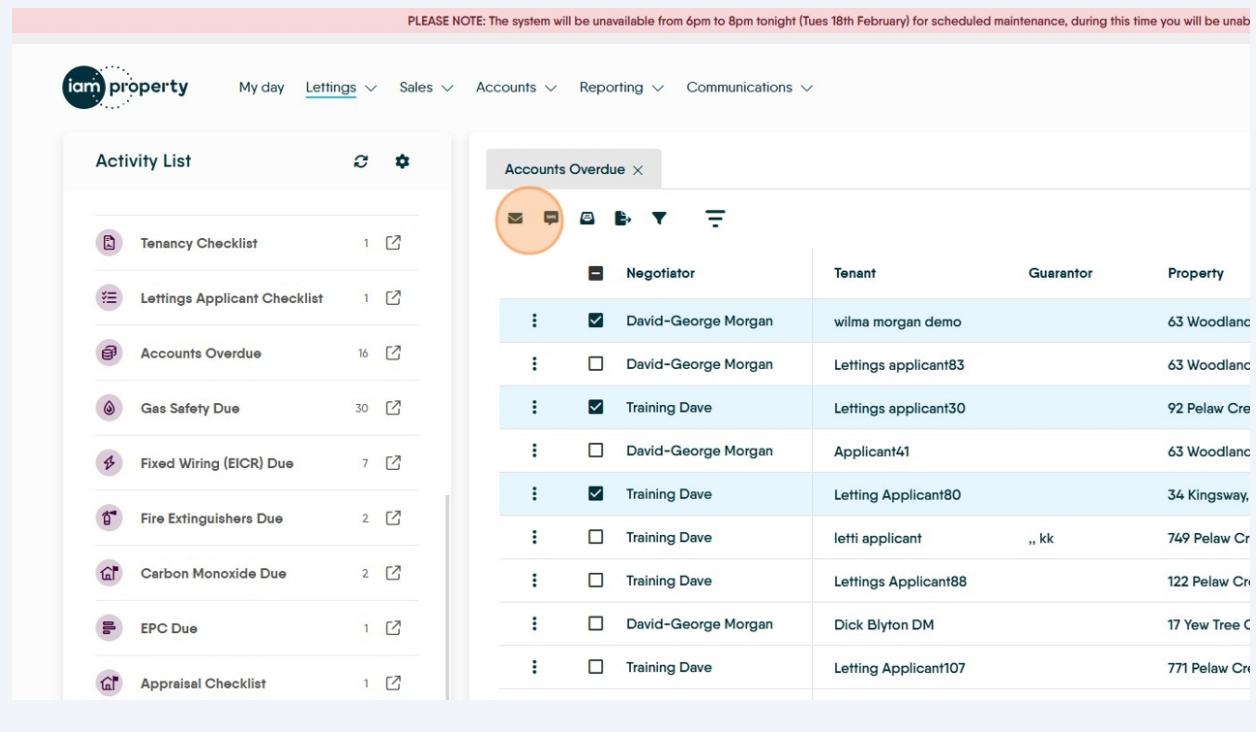
Activity List

- Tenancy Checklist
- Lettings Applicant Checklist
- Accounts Overdue
- Gas Safety Due
- Fixed Wiring (EICR) Due
- Fire Extinguishers Due
- Carbon Monoxide Due
- EPC Due
- Appraisal Checklist
- Appraisals Requiring Conclusion
- Fire Alarm Due

Accounts Overdue

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

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



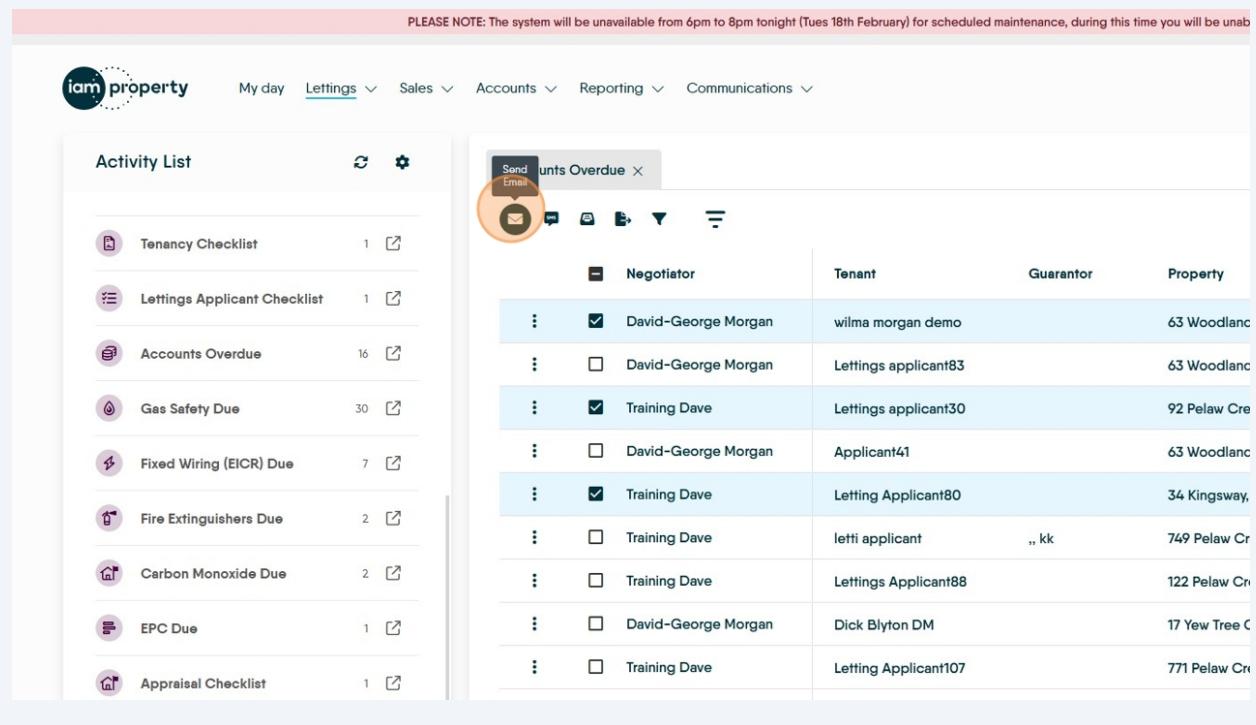
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Activity List

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
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<input type="checkbox"/> Training Dave	Letting Applicant107		771 Pelaw Cr

17 Using email as an example. Click here.



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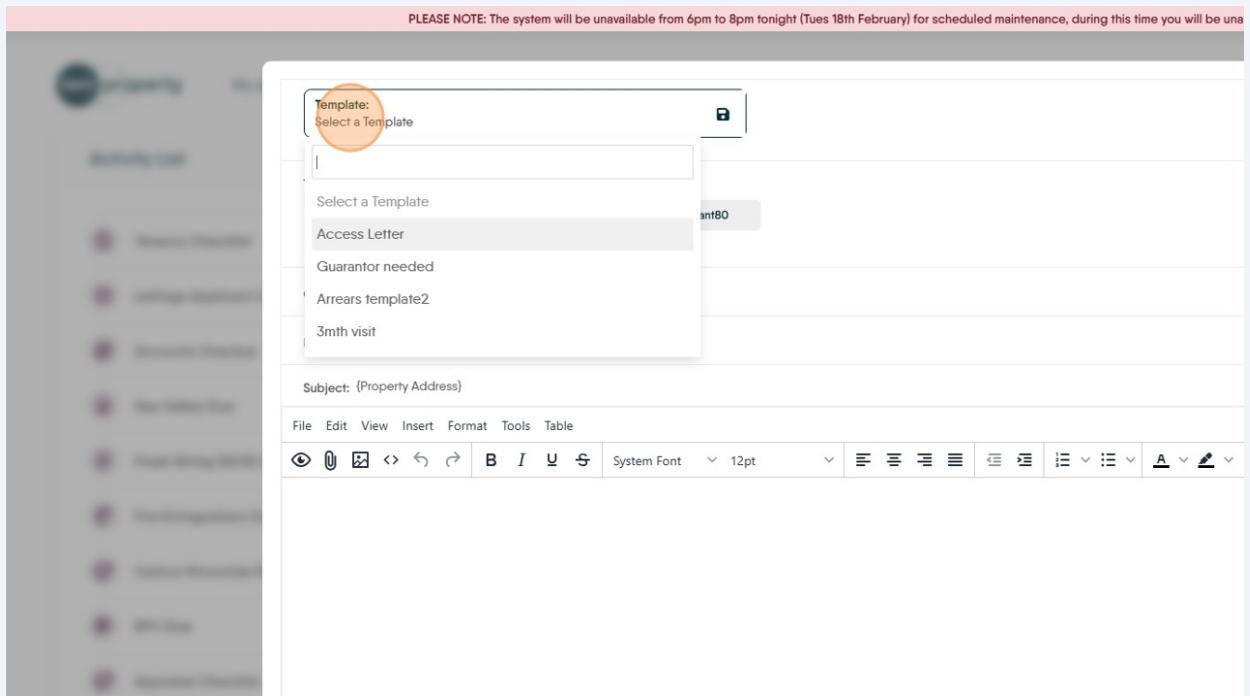
Activity List

Accounts Overdue

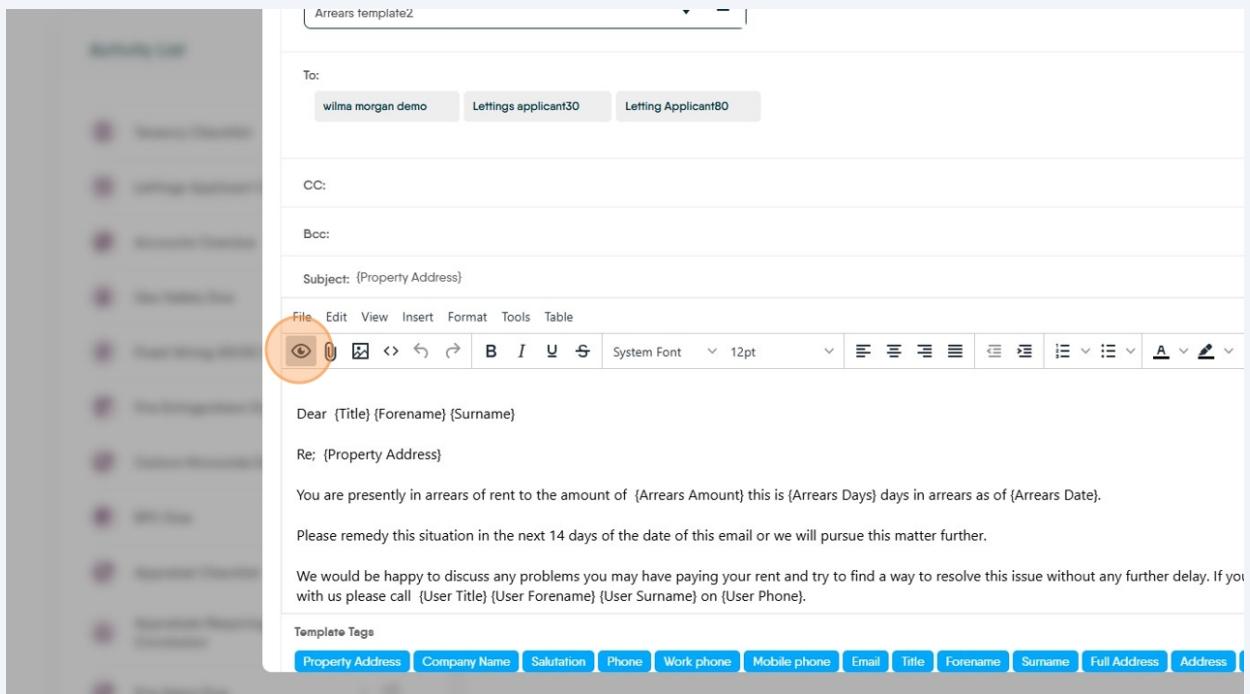
Send Email

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

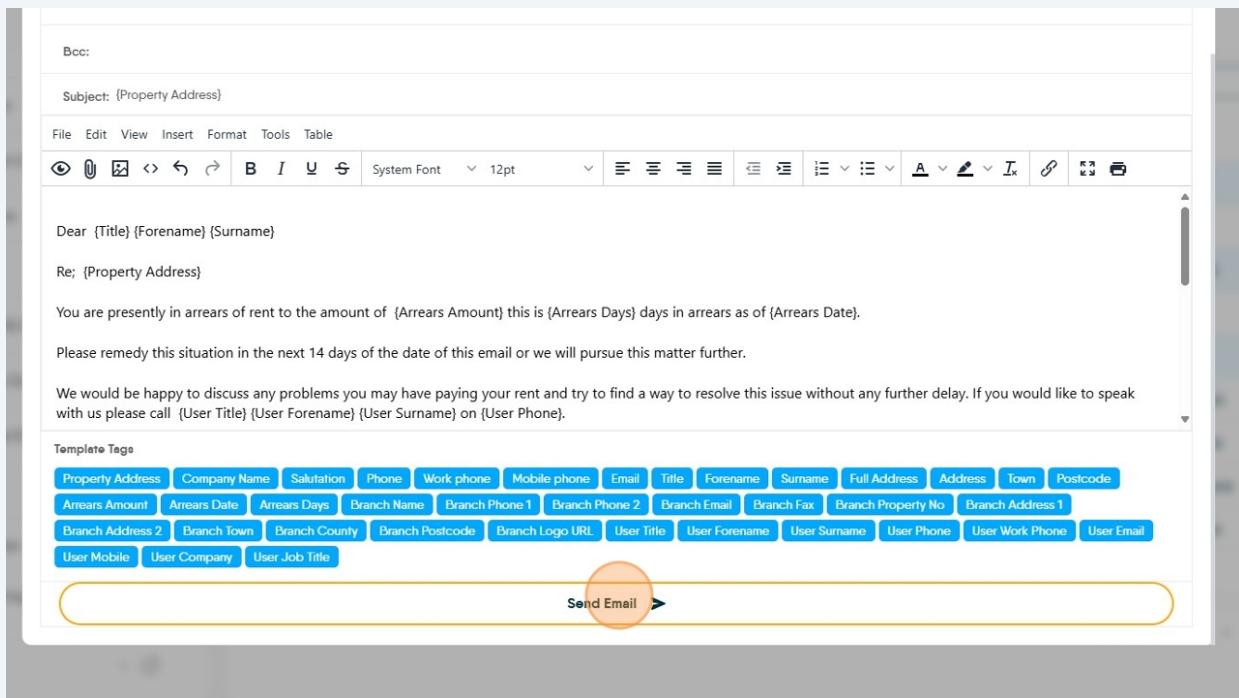
18 Click "Select a Template" and select a template (if there are any created)



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



i 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

21 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.

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Activity List

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

Accounts Overdue X Gas Safety Due X

Send SMS

Negotiator	Property	Location
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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SMS Merge ?

Arthur Morgan Gandalf Grey Gandalf Grey Eve Harmon Villegas

From:

Sender: Message Template

Message Template

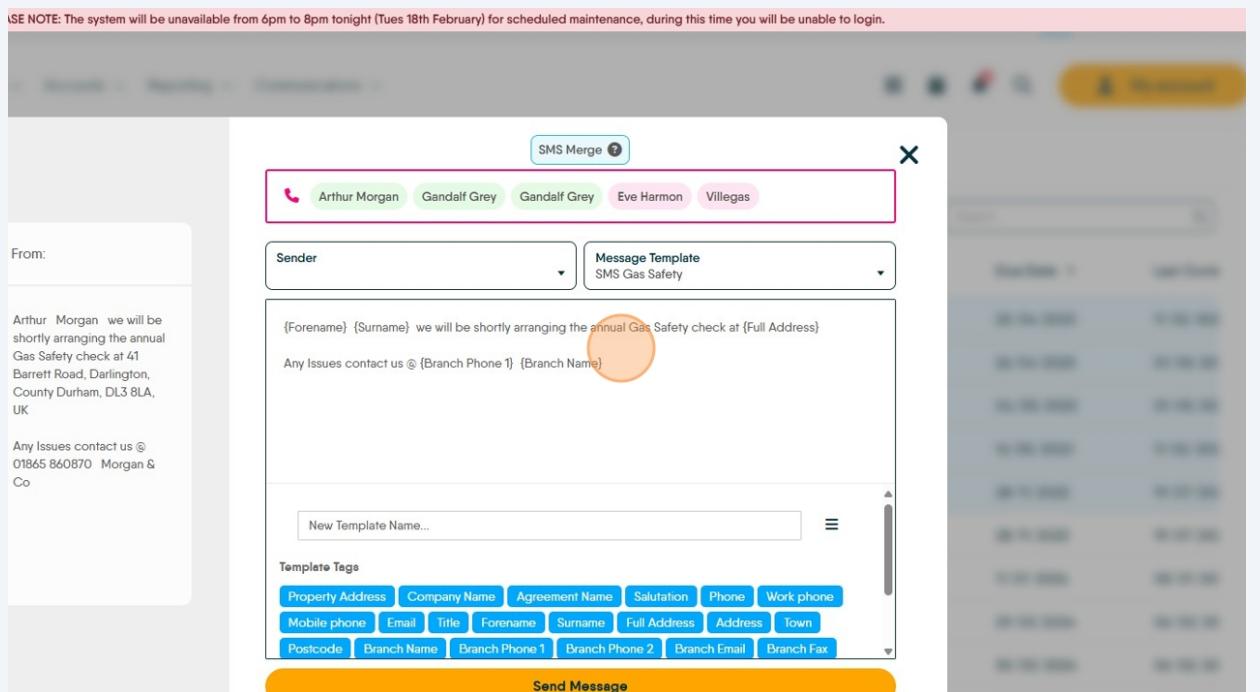
SMS Gas Safety

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



22

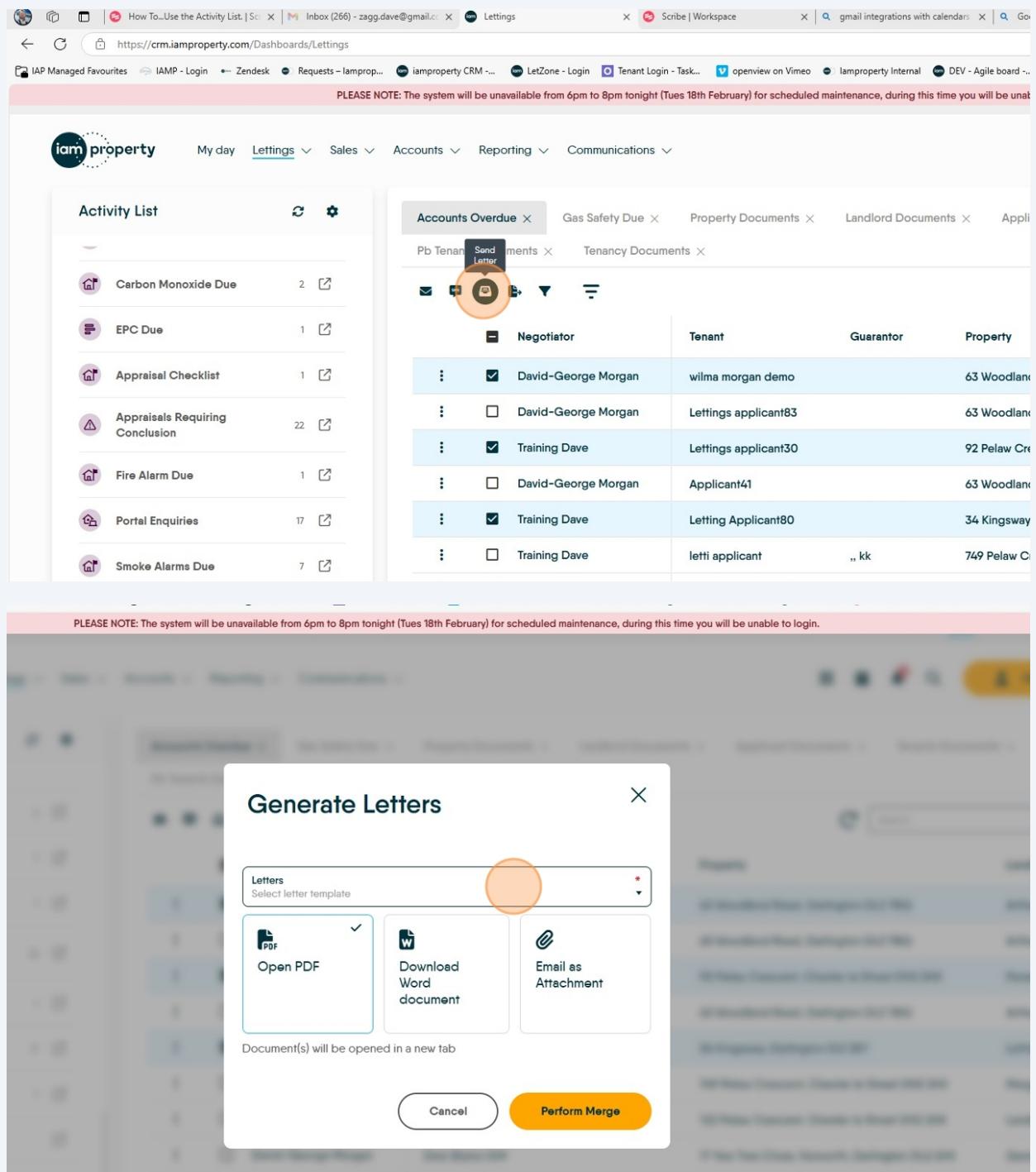
To export the list to CSV click here. The document will be saved to the Downloads folder of your computer.

Negotiator	Property	Last Due Date
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

23

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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Activity List

- Carbon Monoxide Due
- EPC Due
- Appraisal Checklist
- Appraisals Requiring Conclusion
- Fire Alarm Due
- Portal Enquiries
- Smoke Alarms Due

Accounts Overdue

Pb Tenant		Send Letter	Gas Safety Due	Property Documents	Landlord Documents	Appl
⋮	<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		

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

