# Sending a Mass Email Using Email Merge in Communications

This guide is essential for anyone looking to efficiently communicate with multiple recipients using email merge (or any other option offered) in Communications.

It provides a step-by-step walk through that simplifies the process, ensuring that users can easily send personalised mass emails. By following the instructions, users can save time and enhance their outreach efforts, particularly during busy periods like the holidays.
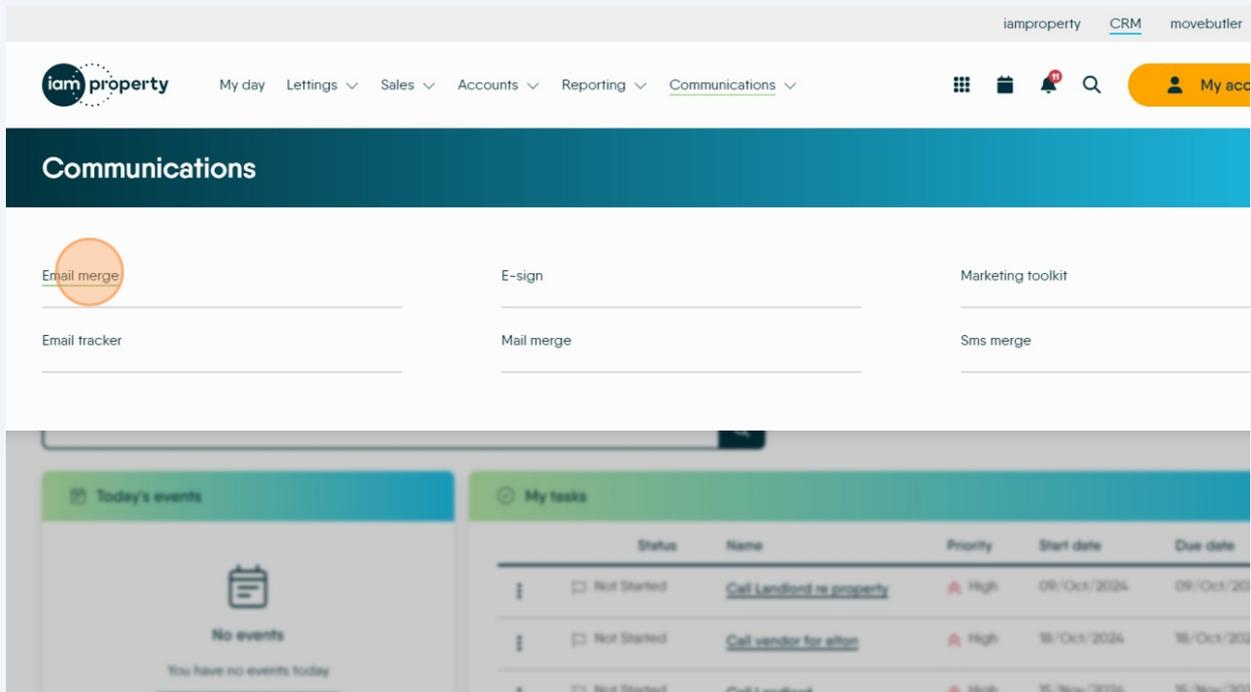
1   Navigate to **https://crm.iamproperty.com/MyDay**
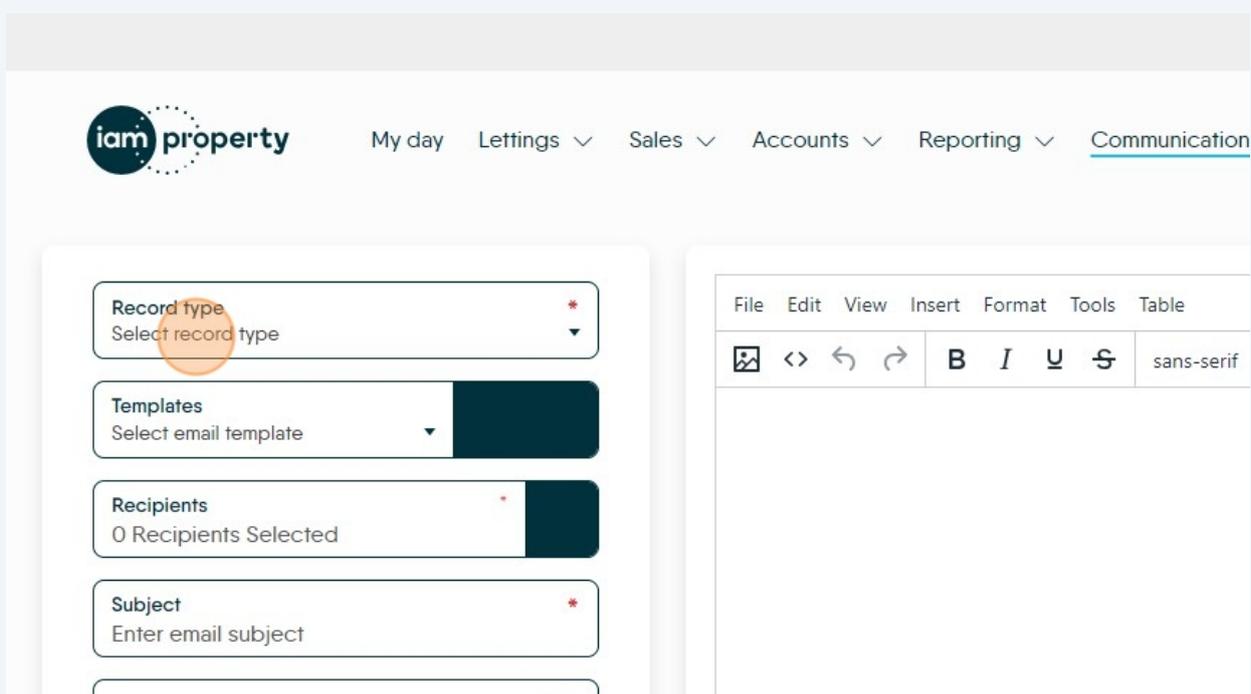
2   Click "Communications"
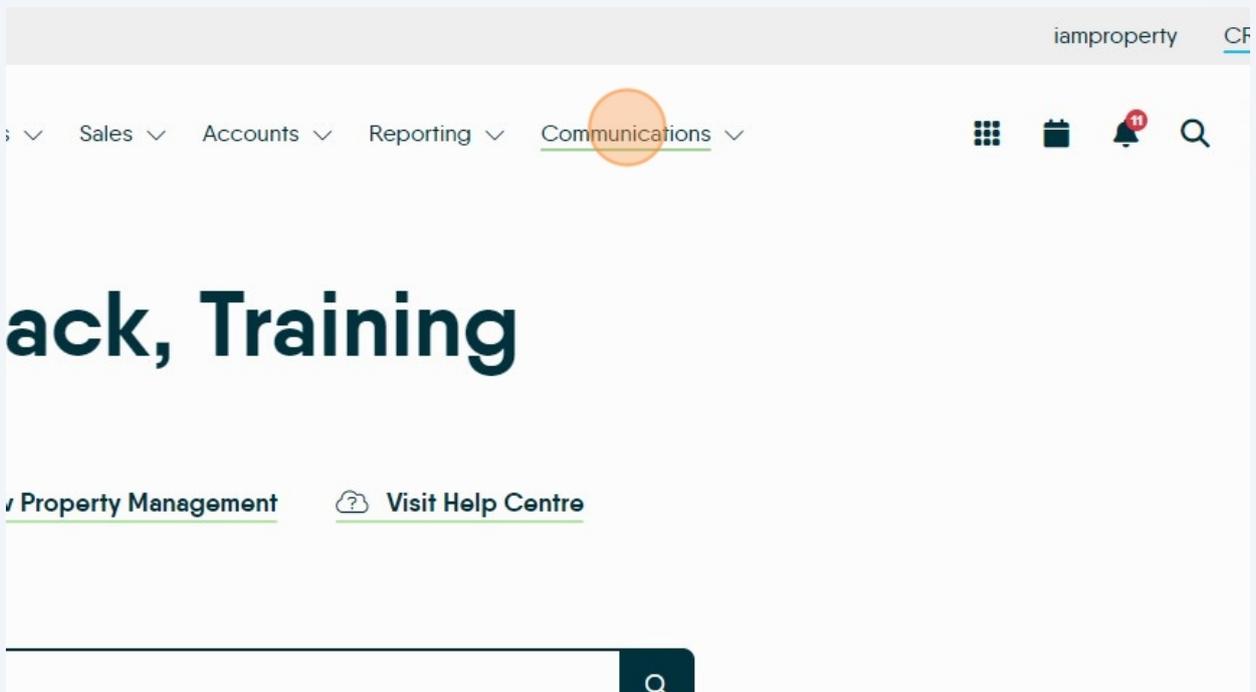
3 Click "Email Merge".

There are also 'Mail' (letters to post) and SMS Merge options. The process to use these is the same. N.B. to use SMS merge you must have an SMS service enabled, iamporerty support 2 providers Textanywhere and Clockwork.**https://www.texta nywhere.com/resellers/free-trial/?ls=Partner&sc=108891&sd=IAmProperty**

iamproperty   CRM   movebutler

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

Communications

Email merge

E-sign

Marketing toolkit

Email tracker

Mail merge

Sms merge

📅 Today's events

✓ My tasks

		Status	Name	Priority	Start date	Due date
⋮	☐ Not Started		Call Landlord re property	🔺 High	09/Oct/2024	09/Oct/20
⋮	☐ Not Started		Call vendor for elton	🔺 High	18/Oct/2024	18/Oct/20
⋮	☐ Not Started		Call Landlord	🔺 High	15/Nov/2024	15/Nov/20

📅

No events

You have no events today

4 Click "Select record type"

iam property   My day   Lettings ∨   Sales ∨   Accounts ∨   Reporting ∨   Communication

Record type   *
Select record type   ▼

Templates
Select email template   ▼

Recipients   *
0 Recipients Selected

Subject   *
Enter email subject

File   Edit   View   Insert   Format   Tools   Table

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5 Click the record type you are messaging. In this case we are using "Landlord"

| Record type | * |
| Select record type | |

Select record type

Landlord

Tenant

Contractor

Vendor

Lettings Applicant

Track emails

File   Edit   View   Insert   Format   Tools   Table

🖼 ‹› ↶ ↷   **B** *I* U S   sans-serif

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6 Click here and select an email template (if you have any created). Templates set the body text and/or style of your email.
Click here.

iam property   My day   Lettings ⌄   Sales ⌄   Accounts ⌄   Reporting ⌄   Communication

| Record type | * |
| Landlord | ▾ |

| Templates | ▾ |
| Select email template | |

| Recipients | * |
| 0 Recipients Selected | |

| Subject | * |
| Enter email subject | |

Include email signature

File   Edit   View   Insert   Format   Tools   Table

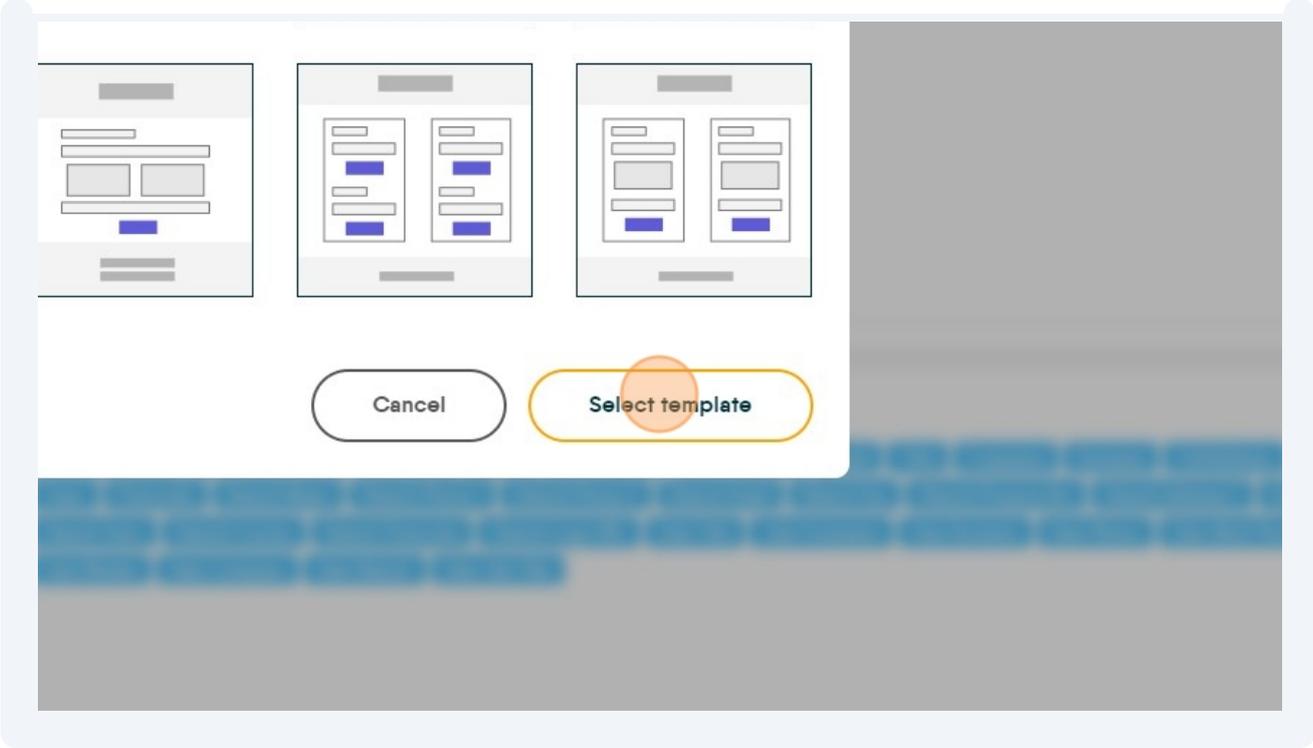🖼 ‹› ↶ ↷   **B** *I* U S   sans-serif

7 There are pre-set email templates that can be used, select the one to use and click "Select Template"

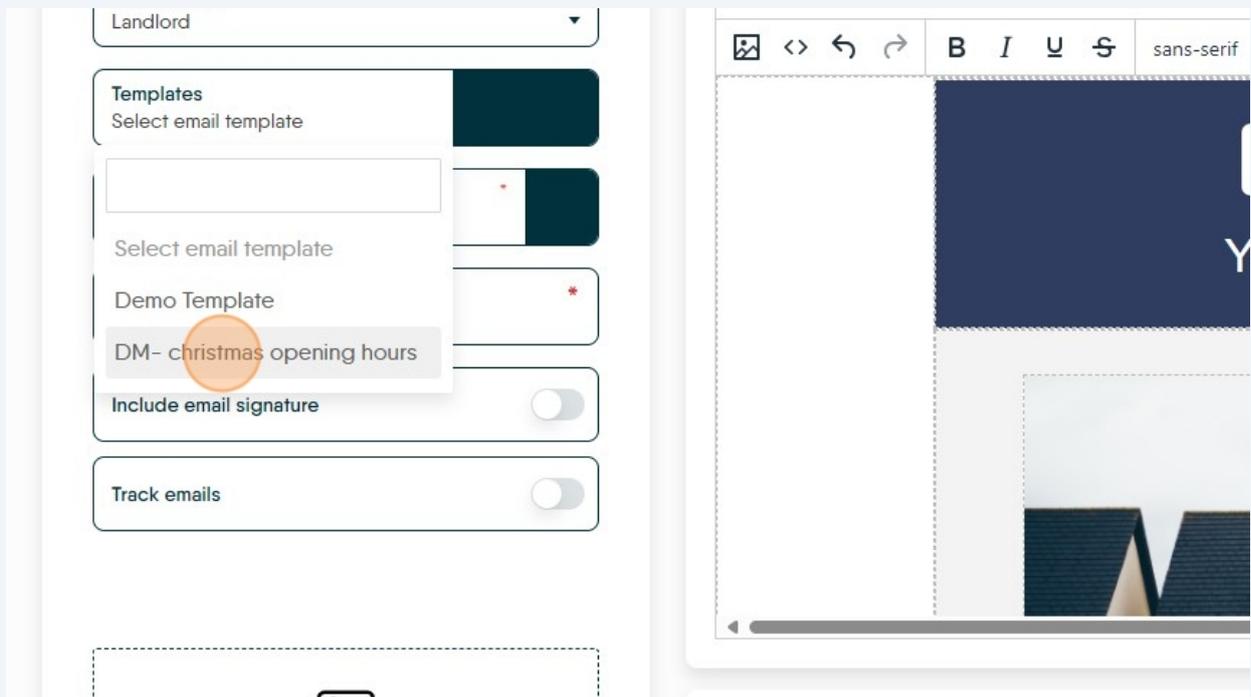Cancel   Select template
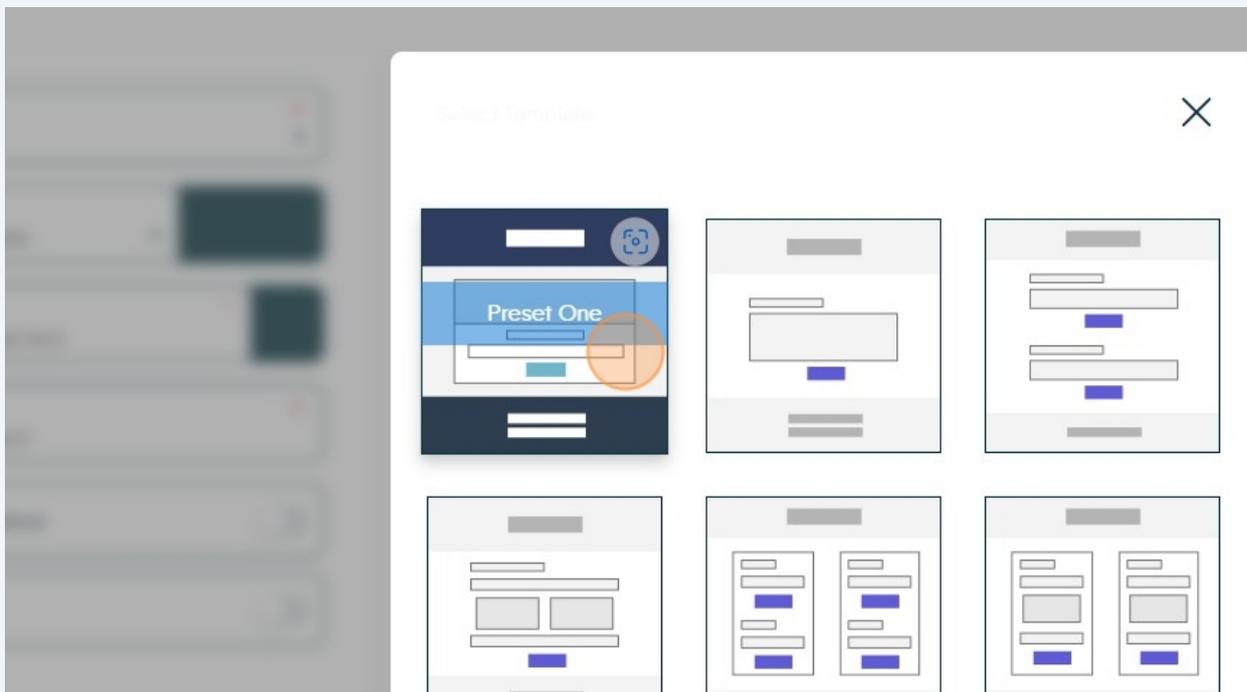
8   Using an example. Click here.

iam property   My day   Lettings ⌄   Sales ⌄   Accounts ⌄   Reporting ⌄   Communication

Record type   *
Landlord

Templates
Select email template

Recipients   *
0 Recipients Selected

Subject   *
Enter email subject

Include email signature

File   Edit   View   Insert   Format   Tools   Table

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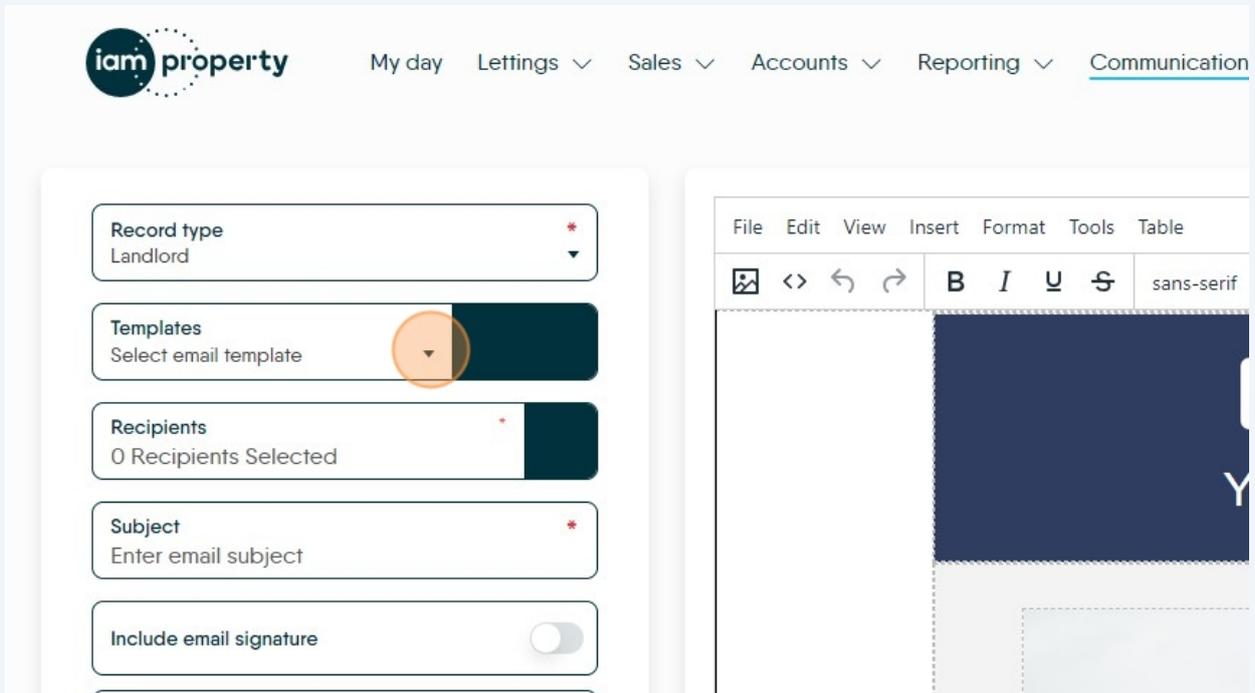
9 Click "DM- Christmas opening hours" this sets the body text of our email.

Landlord

Templates
Select email template

Select email template

Demo Template

DM- christmas opening hours

Include email signature

Track emails

10 To select the recipients of the email click here.

Record type *
Landlord

Templates
DM- christmas opening hours

Recipients *
0 Recipients Selected

Subject *
Enter email subject

Include email signature

Track emails

File   Edit   View   Insert   Format   Tools   Table

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Your Local E
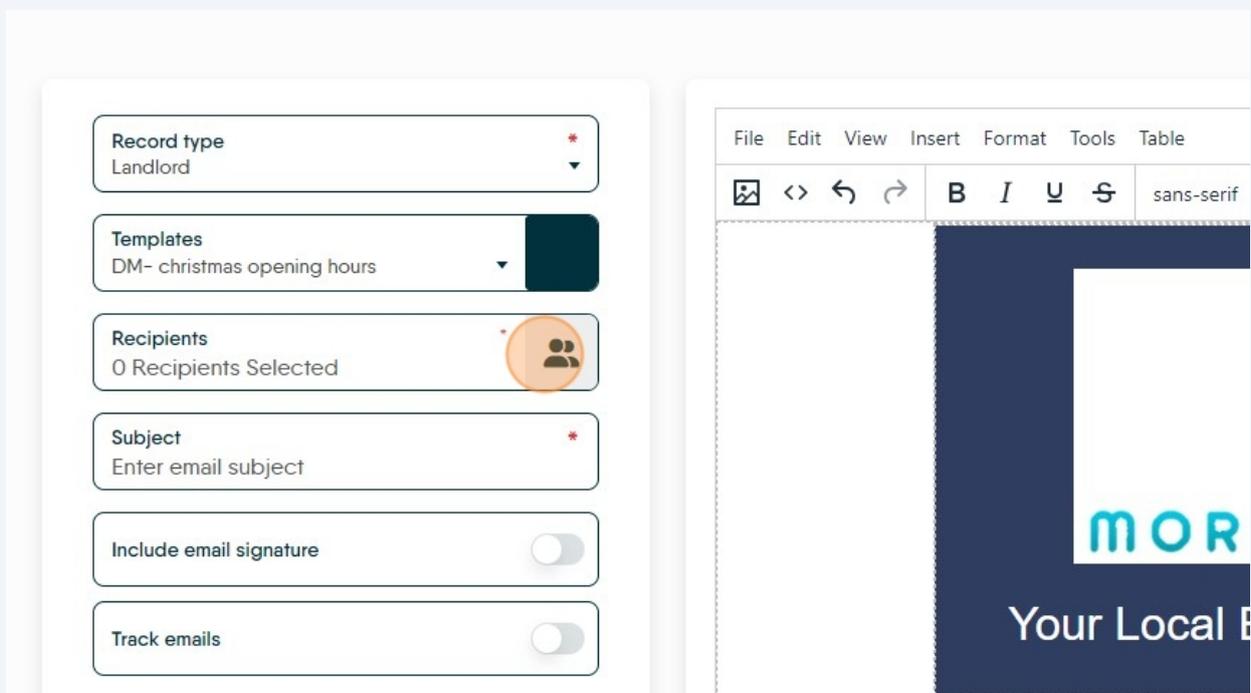
11 Click here to filter the recipients, if required. If you are sending to everyone in the database ignore this option.

Filters:
--unfiltered--

Specify Filter

Search:
Type anywhere to search

	Forename	Surname	Email	Date Added
☐	David-George	Morgan	DGL.david.morgan@vtuk...	23/03/2023

Selected recipien

12 There are many options to use and filter by.

Address
Comparator
Contains
Text
Enter text

Archived

Branch
Branch
Select option

Udf – landlord birthday
Comparator
Select comparator
Select date
Select date
Select date
Select date

Cancel   Apply   Save and apply

Filter name
Enter filter name

Address

Comparator
Contains

Text
Enter text

Archived

Branch

Branch
Select option

Udf – landlord
birthday

Comparator
Select comparator

Select date
Select date

Select date
Select date

Cancel   Apply   Save and apply

Filter name
Enter filter name

×   🖫

Address

Contains

Enter text

Archived

Branch

Branch
Select option

Select option

Anna Estates

Best Estates

Henry & Co

Morgan & Co

Morgan&Co MB

Udf – landlord
birthday

Comparator
Select comparator

Select date
Select date

Cancel   Apply

Filter name
Enter filter name

Specify Filter

	Address	Comparator Contains ▼	Text Enter text

	Archived	

	Branch	Branch Morgan & Co ▼

	Let only properties	Comparator Greater Than ▼	Number 0	Number 0

	Managed properties	Comparator Equal To ▼	Number 0	Number 0

	Negotiator			Negotiator Select option ▼

	No. of properties	Comparator Between ▼	Number 1	Number 100

Specify Filter

		Comparator		Number	Number
⬜	Let only properties	Greater Than ▾		0	0
🔘	Managed properties	Equal To ▾		0	0
⬜	Negotiator				Negotiator Select option ▾
⬜	No. of properties	Between ▾		1	100

Cancel   Apply   **Save and apply**

Filter name
Enter filter name   ✕   💾

		Comparator		Number	Number
🔘	Managed properties	Equal To ▾		0	0
🔘	Negotiator				Negotiator Select option ▾
⬜	No. of properties	Between ▾		1	100
⬜	Overseas				
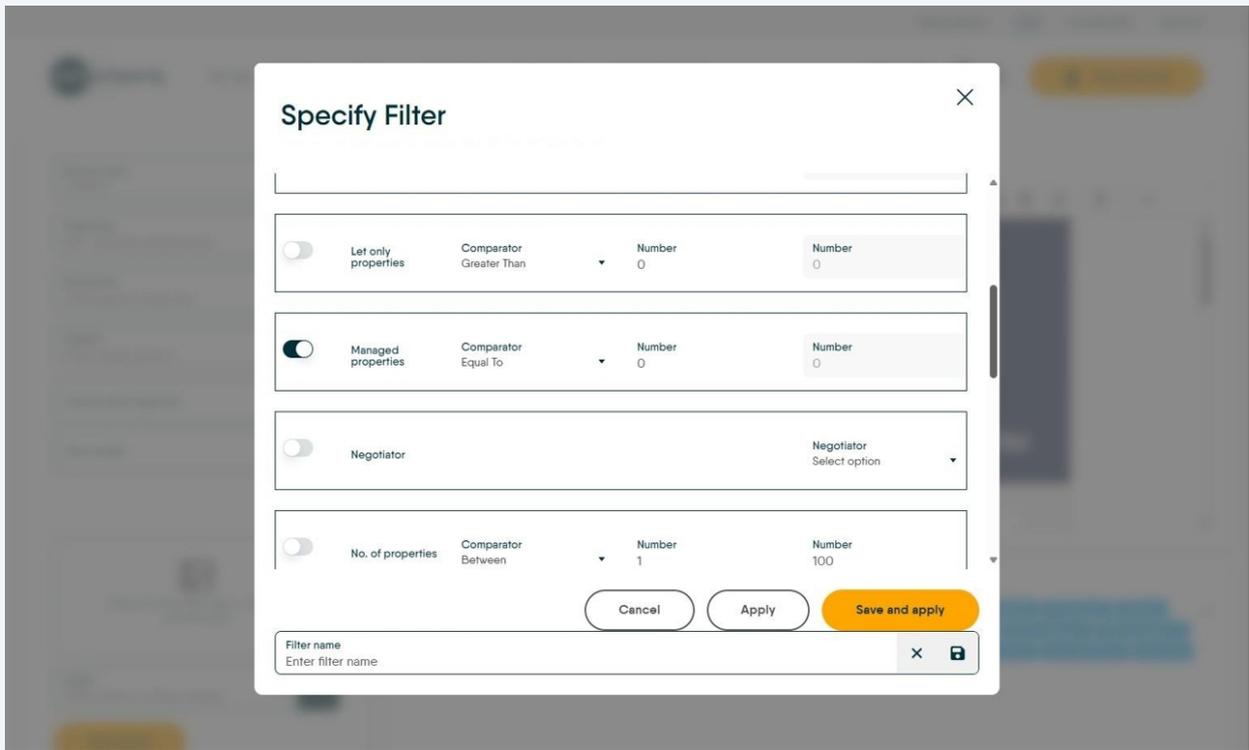
Specify Filter

| | Managed properties | Comparator Equal To ▾ | Number 0 | Number 0 |

| | Negotiator | | Negotiator Select option |

Select option

| Select option |
| VTUK USER |
| David-George Morgan |
| Training Dave |
| James Morgan |

| | No. of properties | Comparator Between ▾ | Number 1 | |

| | Overseas | | |

| | Negotiator | | Negotiator Training Dave ▾ |

| | No. of properties | Comparator Between ▾ | Number 1 | Number 100 |

| | Overseas | | |

Cancel   Apply   **Save and apply**

Filter name
Enter filter name   ✕ 💾

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13   Click the "Filter Name" field and give your filter a name so it can be easily reused.

Send statement via   **Send statement via**
                                          Email ▾

Source   **Source**
                                          Select option ▾

Status   **Status**
                                          Active ▾

[Cancel]   [Apply]   [**Save and apply**]

Filter name
Enter filter name   ✕   🖫

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via   Email ▾

Source   **Source**
                                          Select option ▾

Status   **Status**
                                          Active ▾

[Cancel]   [Apply]   [**Save and apply**]

Filter name
Training Dave Filter   ✕   🖫

14 Click this checkbox to select your recipients.

15 Click "Add Selected Recipients"

16 Click the "Subject" field.

Record type
Landlord

Templates
DM- christmas opening hours

Recipients
8 Recipients Selected

Subject
Enter email subject

Include email signature

Track emails

File   Edit   View   Insert   Format   Tools   Table

B   I   U   S   sans-serif

M O R

Your Local
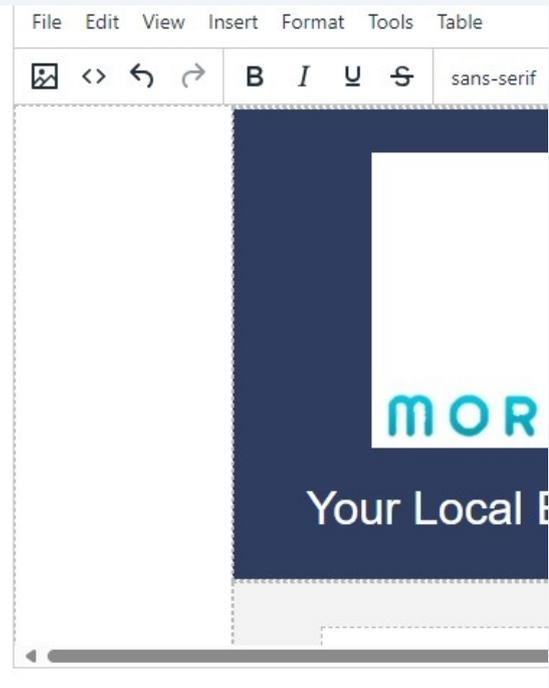
17 Click here to include your email signature.

18 Click here to track emails e.g. read, deleted etc.

19 Click "Drag and drop files here or click to upload media" if you want to add attachments to the message.
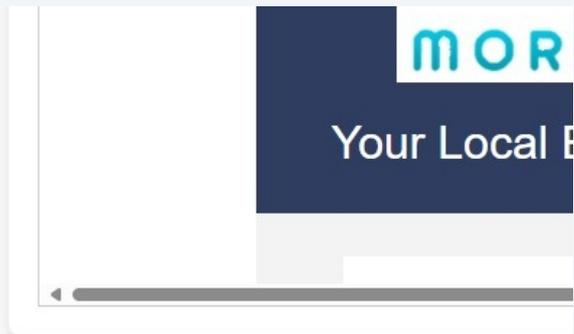
20 Click here if you have a previous draft you want to use or if you want to save this draft option.
Click here.

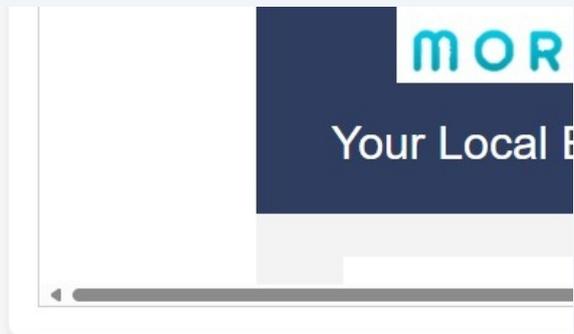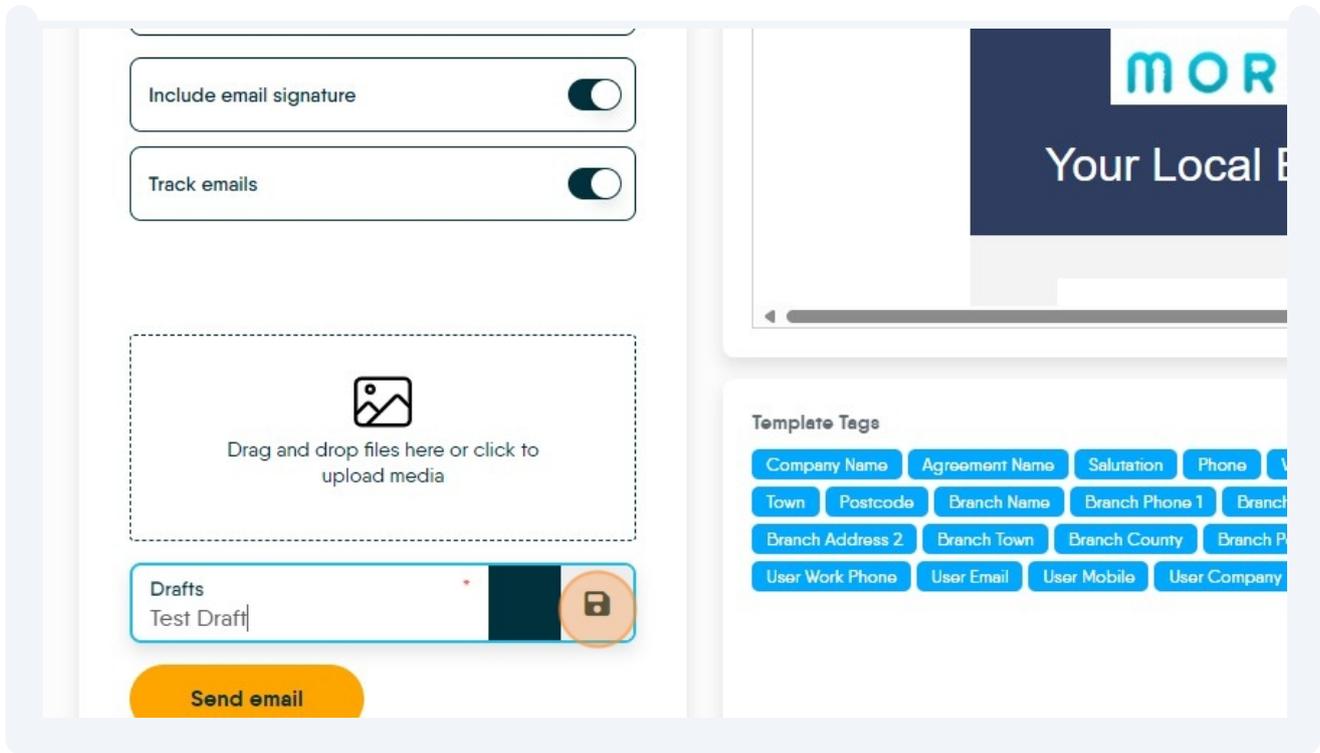**21**   Click "Send Email" to send your message.