

Sending a Mass Email Using Email Merge in Communications

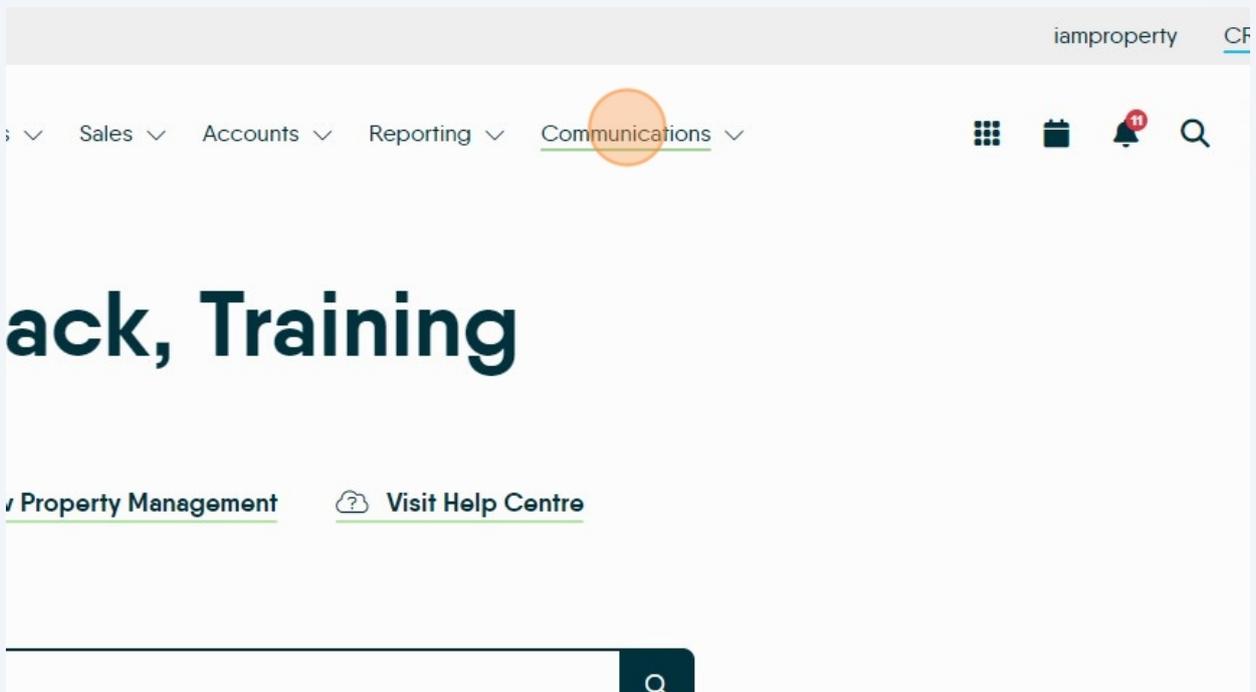


This guide is essential for anyone looking to efficiently communicate with multiple recipients using email merge (or any other option offered) in Communications.

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.

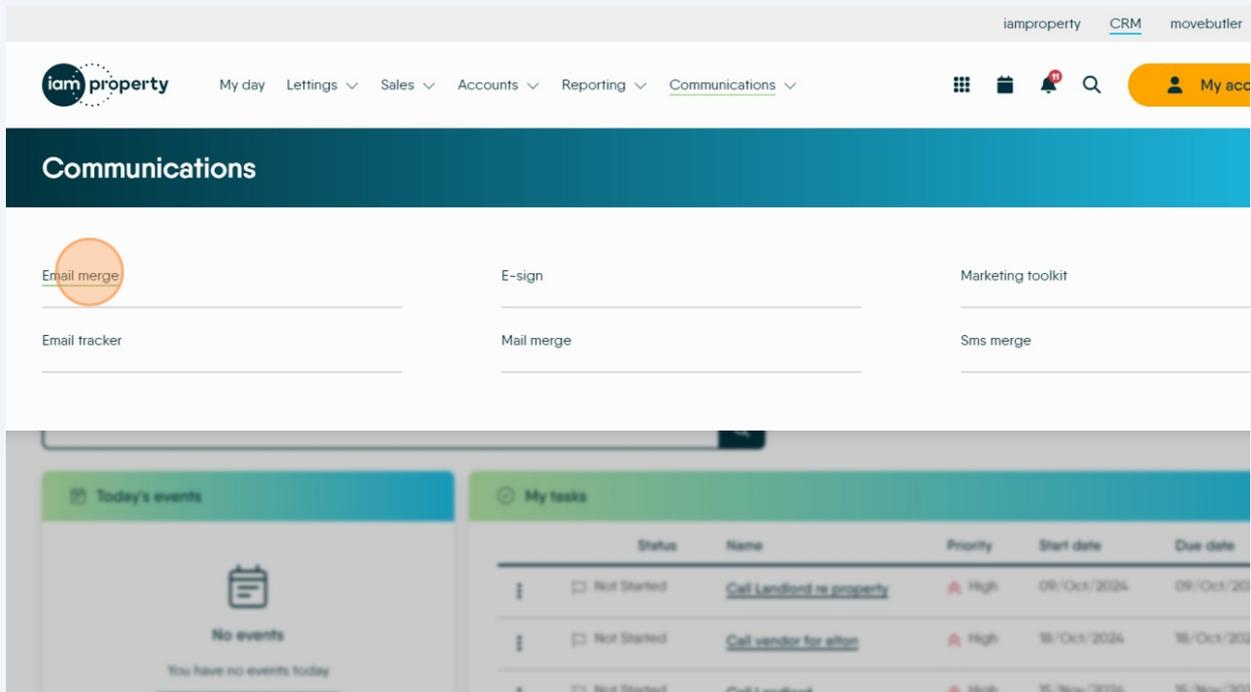
1 Navigate to <https://crm.iamproperty.com/MyDay>

2 Click "Communications"

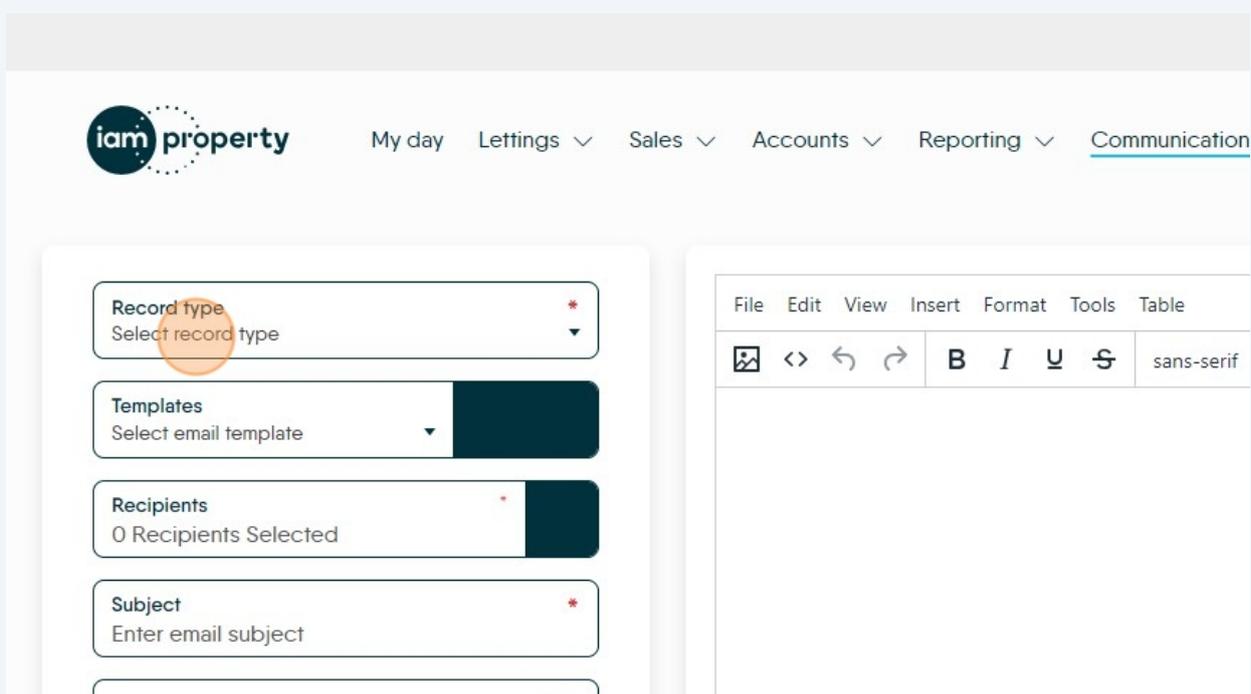


3 Click "Email Merge".

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, iamproperty support 2 providers Textanywhere and Clockwork. <https://www.textanywhere.com/resellers/free-trial/?ls=Partner&sc=108891&sd=IAmProperty>



4 Click "Select record type"



- 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

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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.



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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Record type
Landlord

Templates
Select email template

Select email template

Demo Template

DM- christmas opening hours

Include email signature

File Edit View Insert Format Tools Table

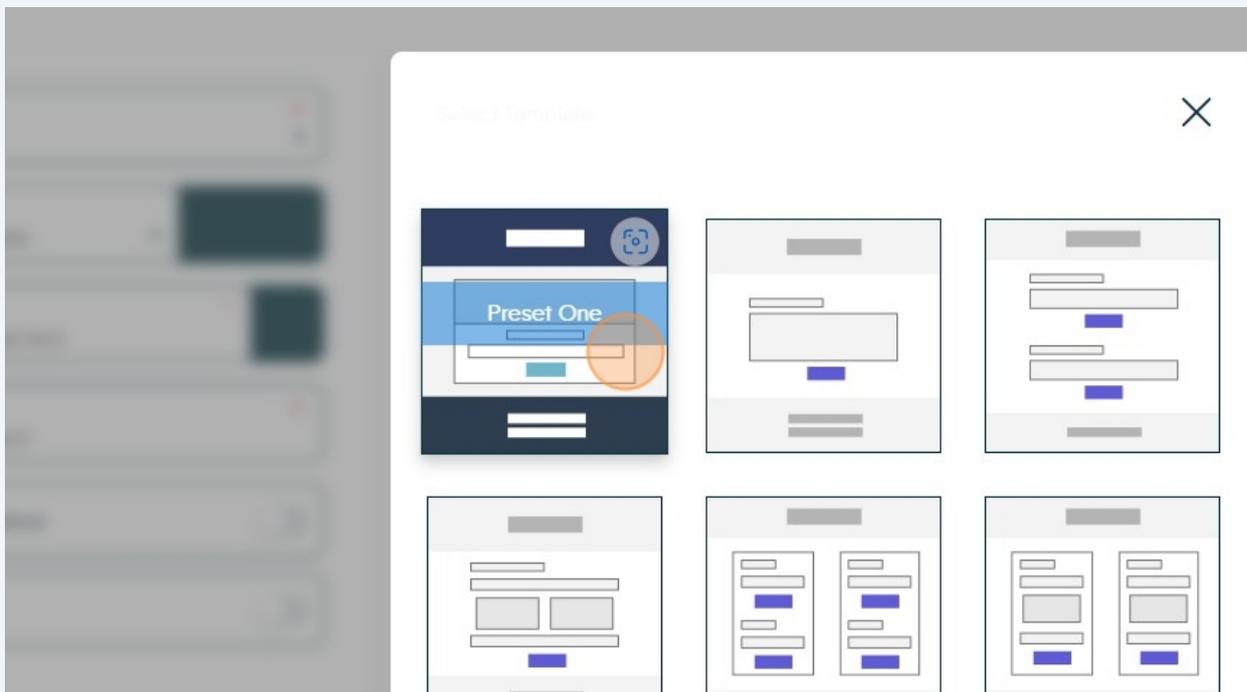
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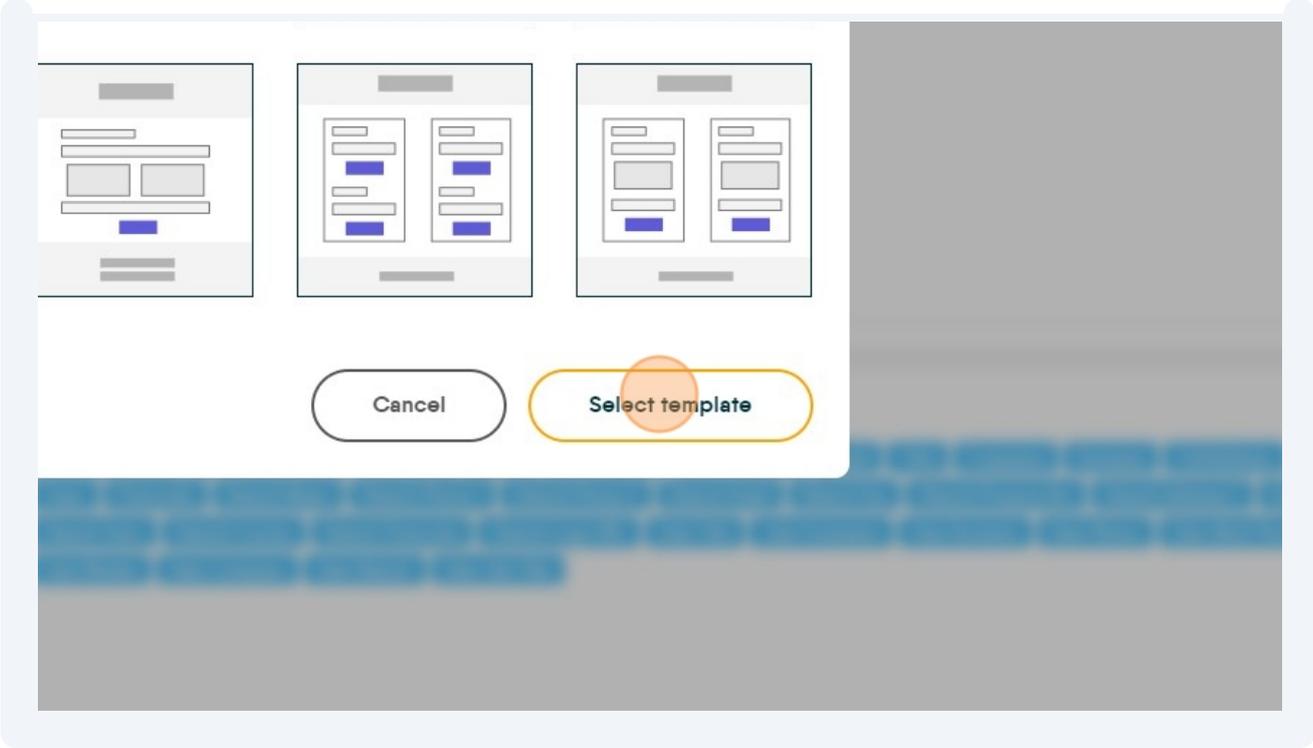
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Font: sans-serif

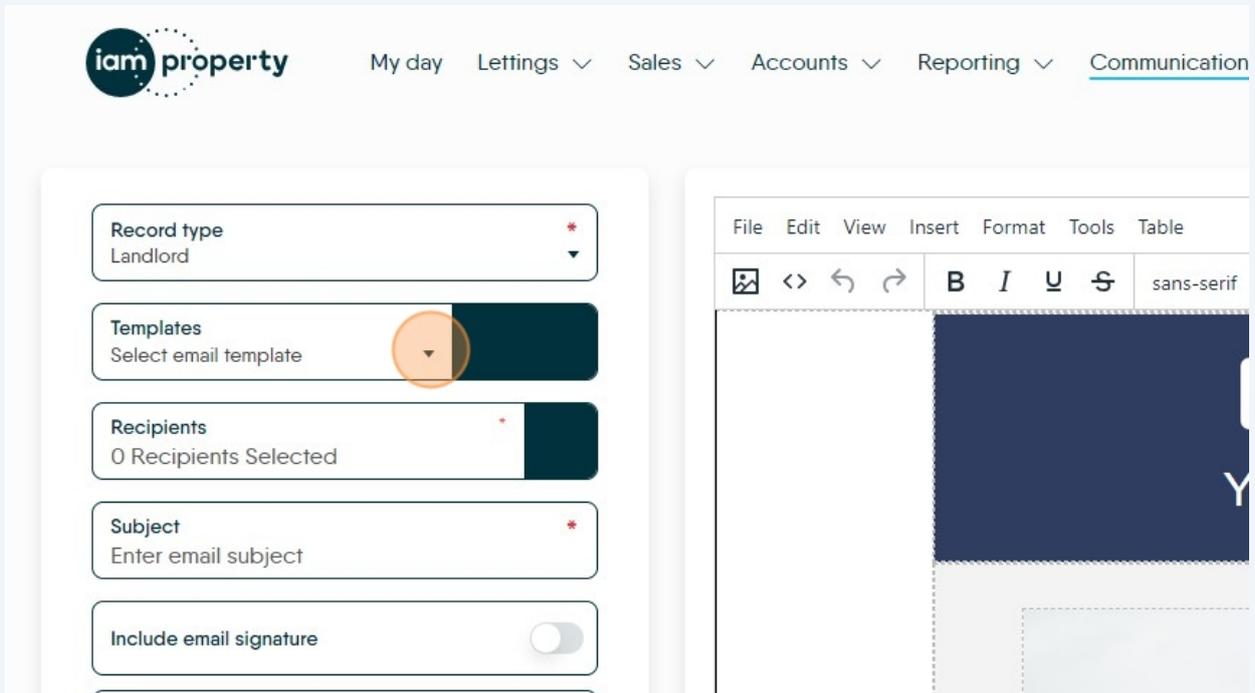
7

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

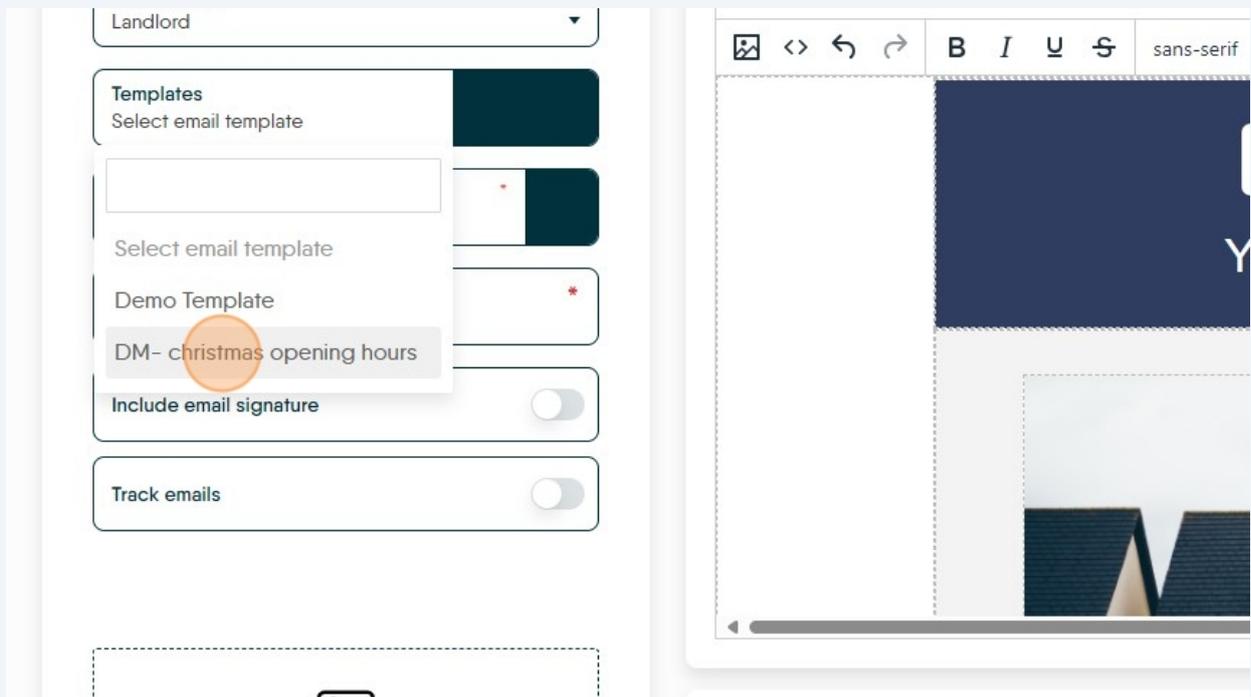




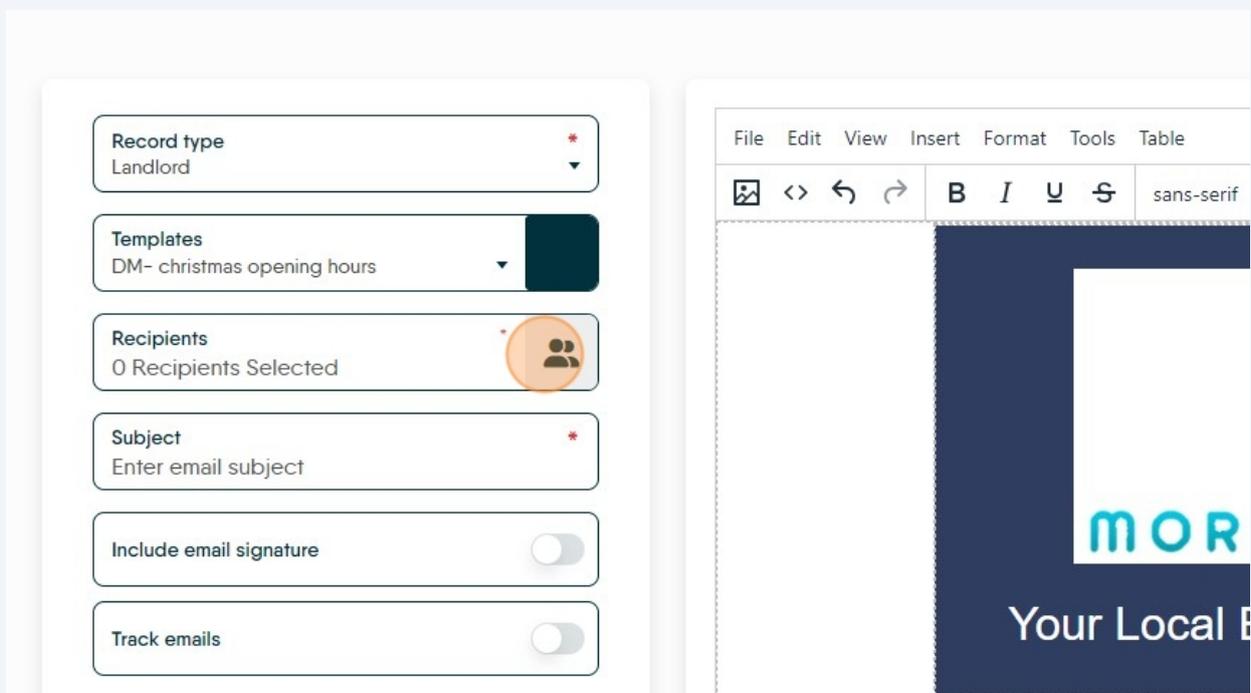
8 Using an example. Click here.



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



10 To select the recipients of the email click here.



11

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

The screenshot shows a web interface for selecting recipients. At the top, there is a 'Filters:' dropdown menu currently set to '--unfiltered--'. To its right is a 'Specify Filter' button. Below the filters is a search bar with the placeholder text 'Type anywhere to search' and a magnifying glass icon. Below the search bar is a table with the following columns: Forename, Surname, Email, and Date Added. The table contains one row of data: David-George, Morgan, DGL.david.morgan@vtuk..., and 23/03/2023. To the right of the table is a 'Selected recipient' box.

<input type="checkbox"/>	Forename	Surname	Email	Date Added
<input type="checkbox"/>	David-George	Morgan	DGL.david.morgan@vtuk...	23/03/2023

12

There are many options to use and filter by.

The screenshot shows a filter configuration interface. It features four filter rows, each with a toggle switch, a field name, a comparator dropdown, and a value input field. The first row is for 'Address' with a 'Contains' comparator and a 'Text' input field. The second row is for 'Archived'. The third row is for 'Branch' with a 'Select option' dropdown. The fourth row is for 'Udf - landlord birthday' with a 'Select date' comparator and a 'Select date' input field. At the bottom, there are three buttons: 'Cancel', 'Apply', and 'Save and apply'. Below the buttons is a 'Filter name' input field with a clear button and a save icon.

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

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

-
- Select option
- Anna Estates
- Best Estates
- Henry & Co
- Morgan & Co
- Morgan&Co MR

Specify Filter



Address Comparator: Contains Text: Enter text

Archived

Branch Branch: Morgan & Co

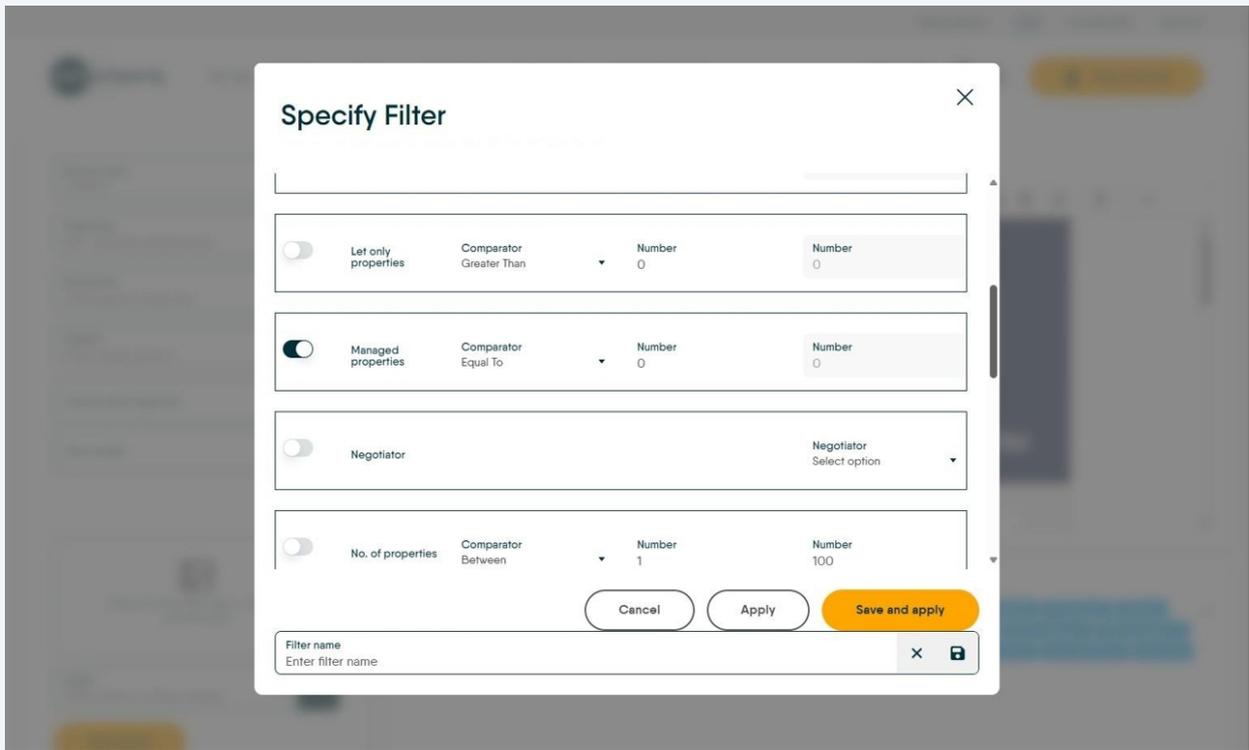
Specify Filter

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

Managed properties Comparator Equal To Number 0 Number 0

Negotiator Negotiator Select option

No. of properties Comparator Between Number 1

Overseas Overseas

Select option

VTUK USER

David-George Morgan

Training Dave

James Morgan

Negotiator Negotiator Training Dave

No. of properties Comparator Between Number 1 Number 100

Overseas Overseas

Filter name
Enter filter name

Cancel Apply Save and apply

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 ✕ 

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.

Select Recipient (Landlord)

Filters: Training Dave Filter

Search: Type anywhere to search

<input type="checkbox"/>	F. ≡	Surna...	Email	Date ...	Con
<input type="checkbox"/>	Let...	Landlord22	zagg.dave...	04/03/20...	✓
<input type="checkbox"/>	Da...	Morgan	crm.trainin...	16/04/20...	✓
<input type="checkbox"/>	Da...	Morgan	crm.trainin...	16/04/20...	✓
<input type="checkbox"/>		morgan	fred@mor...	22/04/20...	✓

15 Click "Add Selected Recipients"

ig.dave...	04/03/20...	✓		
t.trainin...	16/04/20...	✓	16 the stre...	DH 2HX
t.trainin...	16/04/20...	✓	16 the stre...	DH 2HX
d@mor...	22/04/20...	✓		
ig.dave...	04/06/20...	✓		
ig.dave...	12/06/2024	✓		

Cancel Add selected recipients



Alert! If any of your recipients have opted out of contact via a specific way (e.g. email) then a warning message will show. This can be overridden and message still sent.

16 Click the "Subject" field.

Record type
Landlord

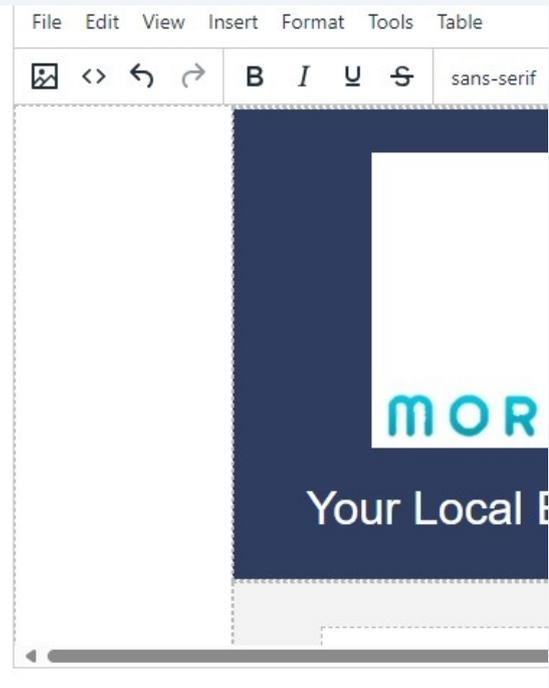
Templates
DM- christmas opening hours

Recipients
8 Recipients Selected

Subject
Enter email subject

Include email signature

Track emails



17 Click here to include your email signature.

Templates
DM- christmas opening hours

Recipients
8 Recipients Selected

Subject
Test Email

Include email signature

Track emails

Template Tags

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

Recipients
8 Recipients Selected

Subject
Test Email

Include email signature

Track emails

Drag and drop files here or click to upload media

Template Tags

- Company Name
- Agreement Name
- Salutation
- Phone
- Town
- Postcode
- Branch Name
- Branch Phone 1
- Branch

19

Click "Drag and drop files here or click to upload media" if you want to add attachments to the message.

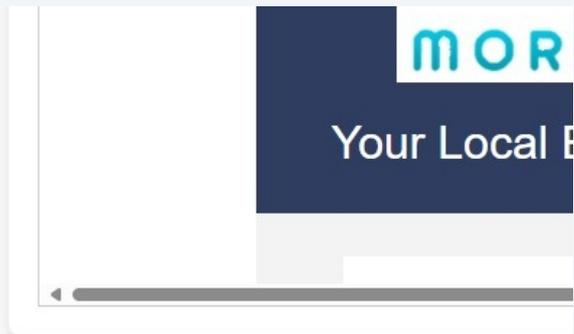
Include email signature

Track emails


Drag and drop files here or click to upload media

Drafts
Select draft to continue editing

Send email



Template Tags

- Company Name
- Agreement Name
- Salutation
- Phone
- Town
- Postcode
- Branch Name
- Branch Phone 1
- Branch
- Branch Address 2
- Branch Town
- Branch County
- Branch P
- User Work Phone
- User Email
- User Mobile
- User Company

20

Click here if you have a previous draft you want to use or if you want to save this draft option.
Click here.

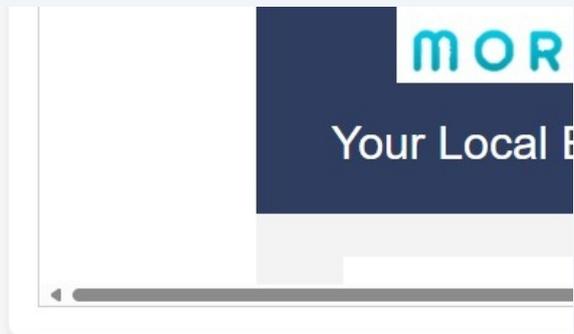
Include email signature

Track emails


Drag and drop files here or click to upload media

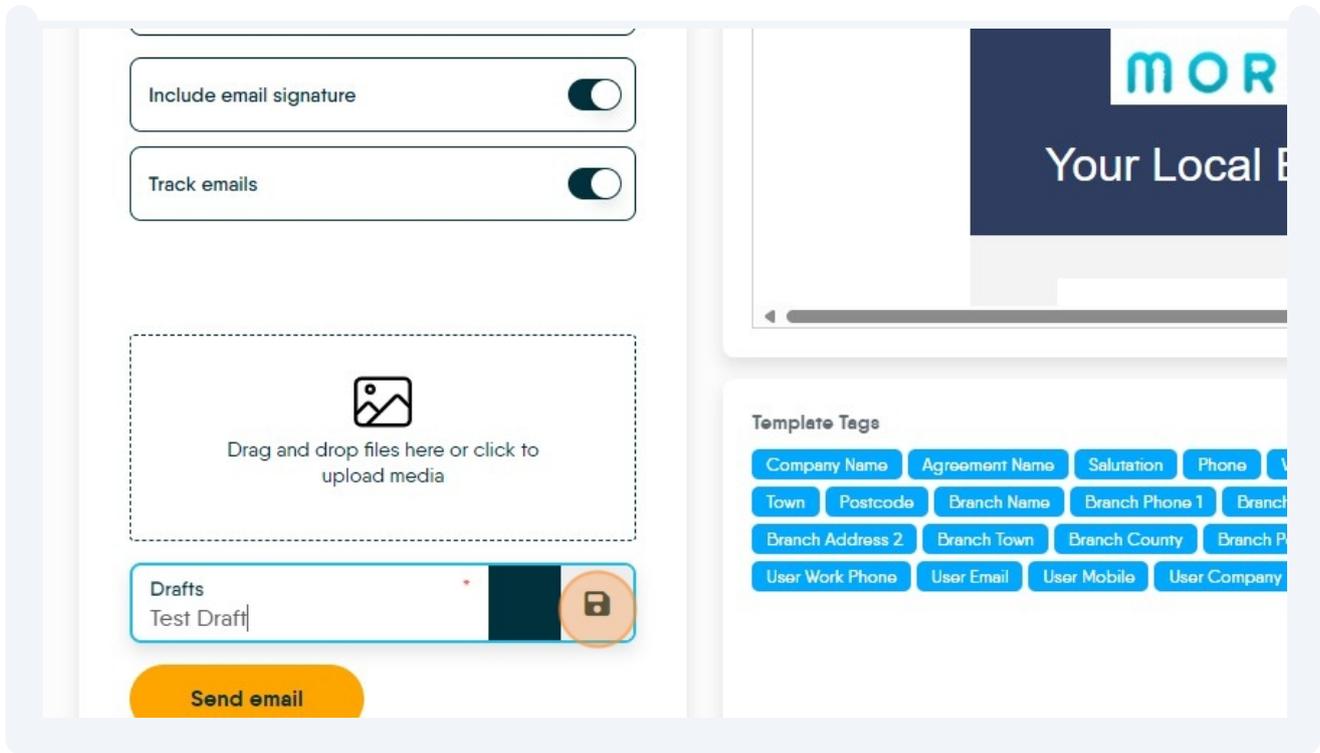
Drafts
Select draft to continue editing

Send email



Template Tags

- Company Name
- Agreement Name
- Salutation
- Phone
- Town
- Postcode
- Branch Name
- Branch Phone 1
- Branch
- Branch Address 2
- Branch Town
- Branch County
- Branch P
- User Work Phone
- User Email
- User Mobile
- User Company



21 Click "Send Email" to send your message.

