

How To...Use the Activity List.



This guide provides a comprehensive overview of accessing and utilizing 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>

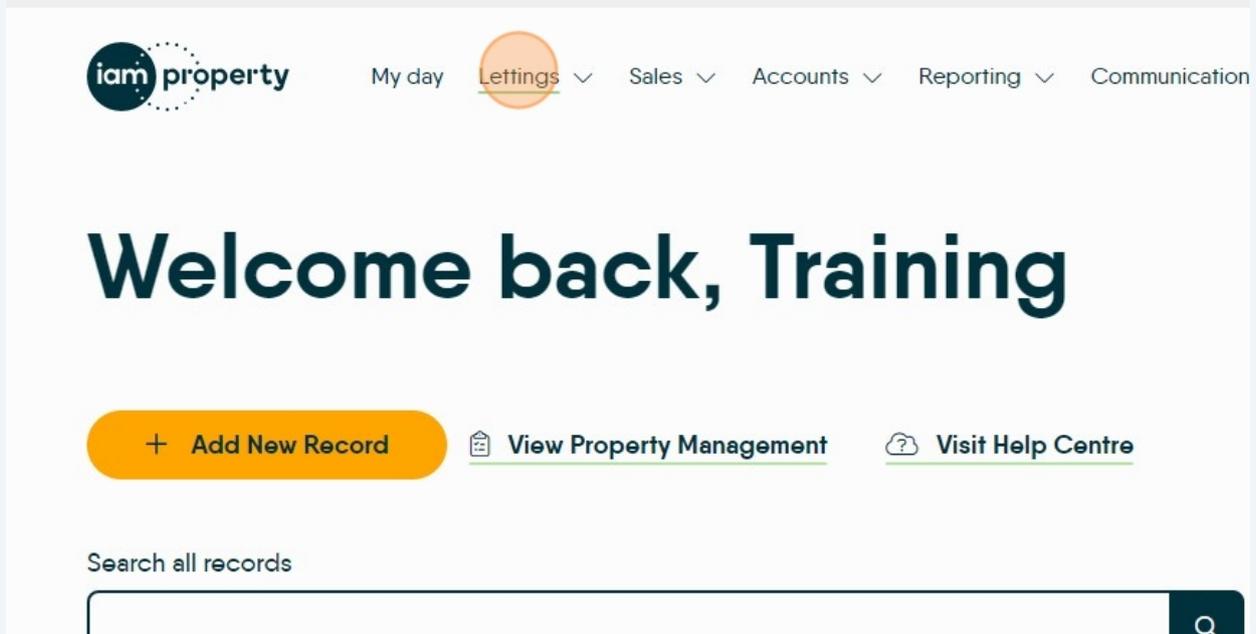
Accessing Lettings (or Sales) Dashboards and Activity Lists

 For this guide we will use the Lettings Dashboard.

2

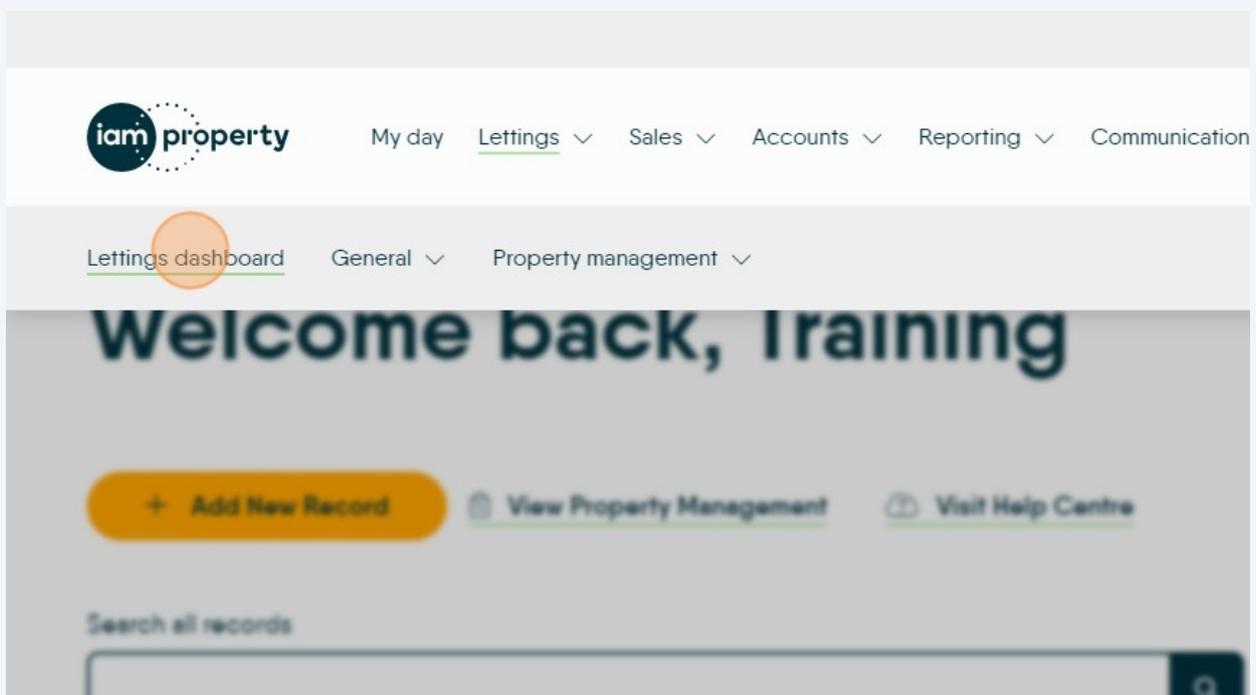
The Activity Lists are a key place from where to manage you day to day activities. The activity lists keep you up to date with who or what needs doing at that moment in time, from contacting customers to managing compliance.

To access the Lettings dashboard. Click "Lettings"



3

Click "Lettings dashboard"



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

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

Properties **73** Landlords **49** Tenants **52** Applicants **10**

Activity List ↻ ⚙️

Deposits Requiring Registration 4 📄

Please select

iam property My day Lettings Sales Accounts Reporting Communication

Sales

Sales Dashboard Property Match

Properties Applicant Match

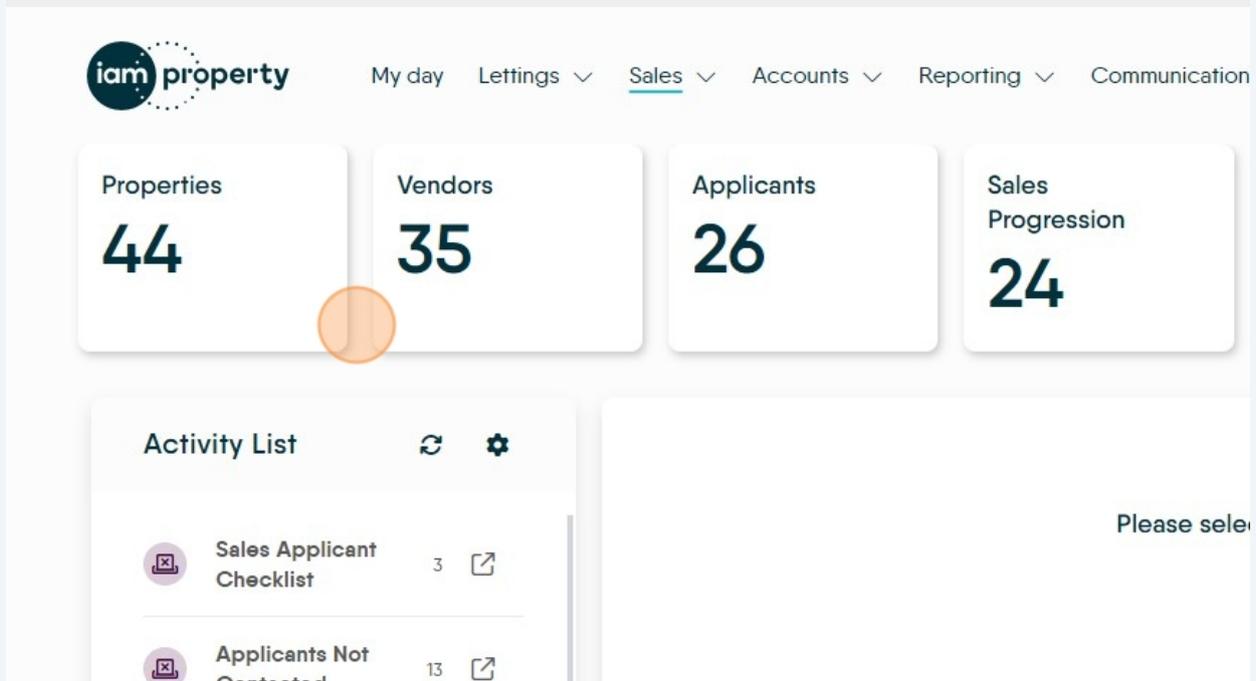
Vendors Reports

Applicants Marketing toolkit

5

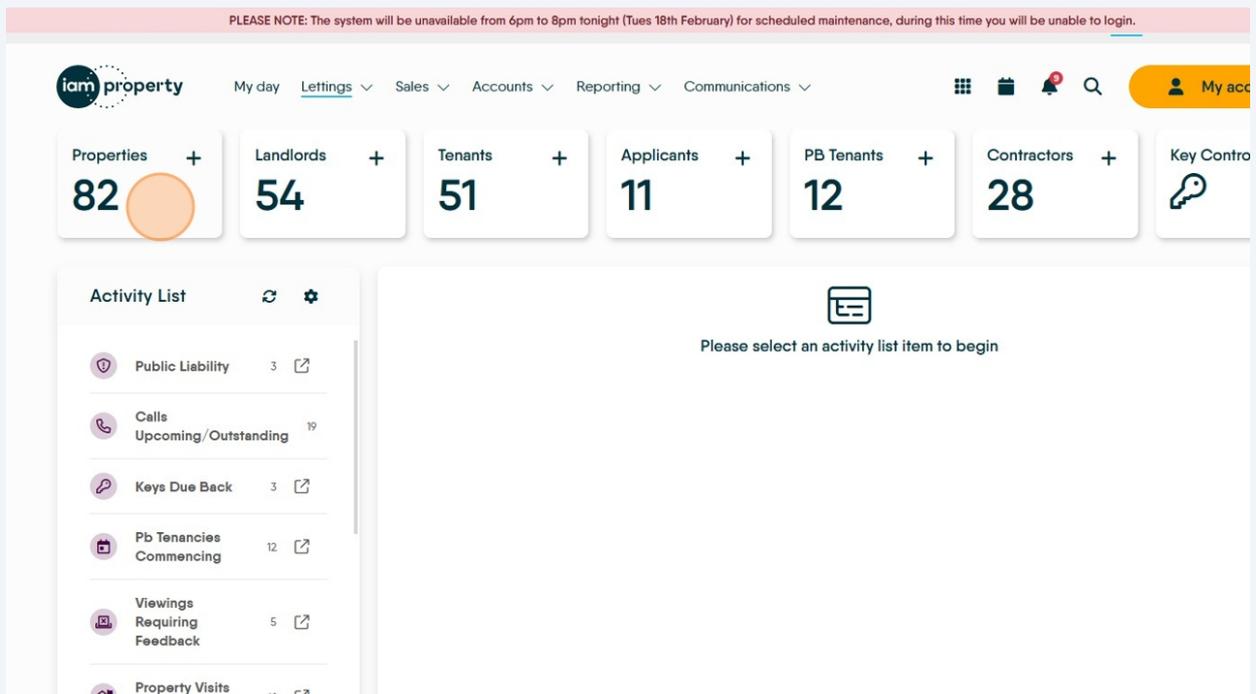
Once in the dashboard you can use the tiles at the top to move from this screen to view property lists, landlords etc. Each tile takes you to a list of (for example) Properties, the number shows the amount of items in the list e.g. 44 Properties.

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



6

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



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.

iam property 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

Property Address	Reference	Rent	Town	Landlord
774 Pelaw Crescent, Chester le Street, County...		1,300 PCM	Chester le Street	landlord55
1091 Pelaw Crescent, Chester le Street, County...		1,200 PCM	Chester le Street	Lettings.landlord99
228 Yew Tree Close, Hurworth, Darlington,...		1,500 PCM	Darlington	Arthur Morgan
suspense Yew Tree Close, Hurworth, Darlington,...		0	Darlington	David-George Morgan

8

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

iam property My day Lettings Sales Accounts Reporting Communications My account

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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

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...

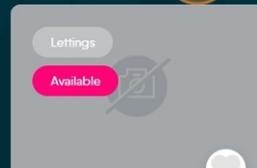
3 Beds | 1 Bath | 2 Reception



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,
Chester le Street, Count...

Beds | 1 Bath | 1 Reception



1,200 PCM

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

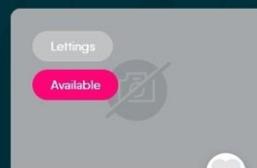
3 Beds | 1 Bath | 2 Reception



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

Customize your PDF X

Portrait Landscape

- Address
- Price
- Bedrooms
- Bathrooms
- Receptions
- Advertising
- Added By
- Last Update By

Download PDF

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 there 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

'#all' returns 82 properties

Property Address	Reference	Rent	Town	Landlord	Tenant
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	

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 preset 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 Applicanto	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

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.

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

Please select an activity list item to begin

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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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

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
- Applicant Checklist 1
- Overdue 16
- Due 30
- g (EICR) Due 7
- ishers Due 2
- noxide Due 2
- 1
- Checklist 1
- Requiring 22
- Due 1

Accounts Overdue x Gas Safety Due x

Search

<input type="checkbox"/> Negotiator	Property	Landlord	Due
⋮ <input type="checkbox"/> David-George Morgan	63 Woodland Road, Darlington DL3 7BQ	Arthur Morgan	25/04/2023
⋮ <input type="checkbox"/> David-George Morgan	Flat 89 Alverton Drive, Faverdale, Darlington DL3 0GA	Gandalf Grey	26/04/2023
⋮ <input type="checkbox"/> David-George Morgan	17 Yew Tree Close, Hurworth, Darlington DL2 2HX	Gandalf Grey	04/05/2023
⋮ <input type="checkbox"/> David-George Morgan	1 Spruce Grove, Darlington DL3 8NW	Eve Harmon	16/05/2023
⋮ <input type="checkbox"/> Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Villegas	28/11/2023
⋮ <input type="checkbox"/> Training Dave	73 Pelaw Crescent, Chester le Street DH2 2HX	Villegas	28/11/2023
⋮ <input type="checkbox"/> Training Dave	16 Yew Tree Close, Hurworth, Darlington DL2 2HX	Landlord4	11/01/2024
⋮ <input type="checkbox"/> Training Dave	69 Kingsway, Darlington DL1 3EY	Letting Landlord	29/03/2024
⋮ <input type="checkbox"/> Training Dave	71 Pelaw Crescent, Chester le Street DH2 2HX	Lattings Landlord35	30/03/2024
⋮ <input type="checkbox"/> Training Dave	15 Barrett Road, Darlington DL3 8LA	Adrian Green	30/03/2024

1 to 10 of 30

Accounts Overdue x Gas Safety Due x

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

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
er le Street DH2 2HX	Villegas	28/11/2023	19/07/2024 12:18	Fully Managed	Agent
er 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	Lettings Landlord	29/03/2024	06/02/2025 15:05	Fully Managed	Contractor
er 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 ×

	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
<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 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 x

	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	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 x

	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
<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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Negotiator	Tenant	Guarantor	Property
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<input type="checkbox"/> Training Dave	Letting Applicant107		771 Pelaw Cr

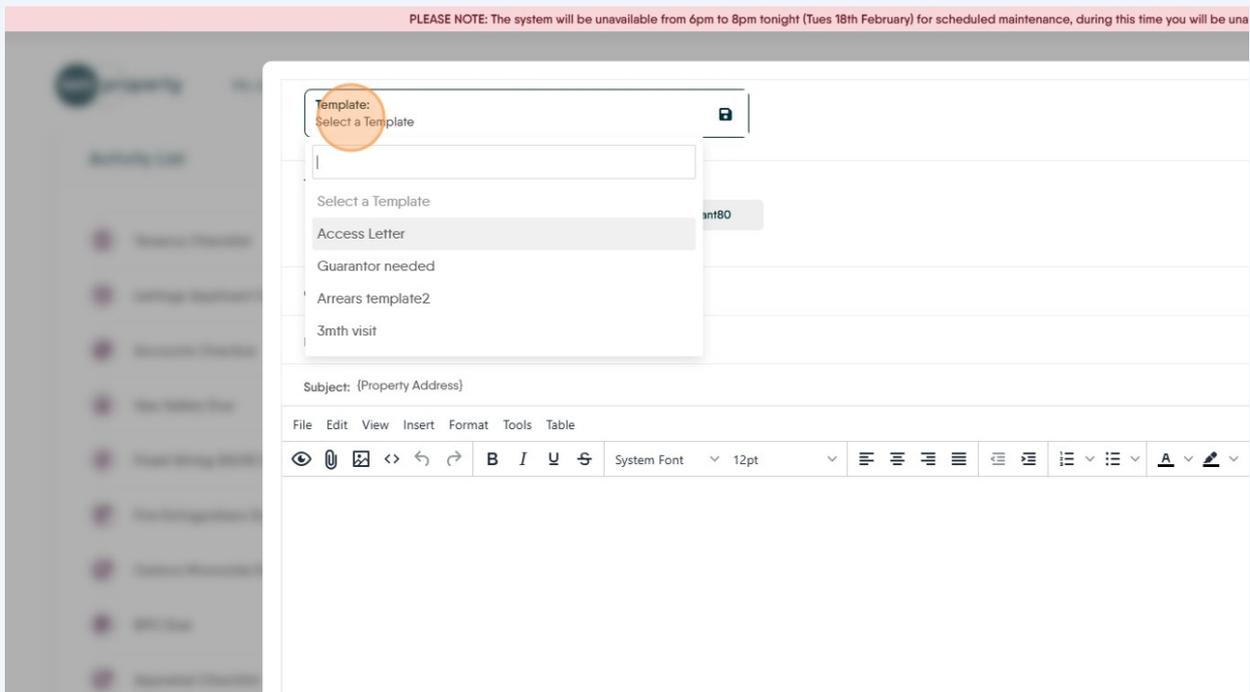
17

Using email as an example. Click here.

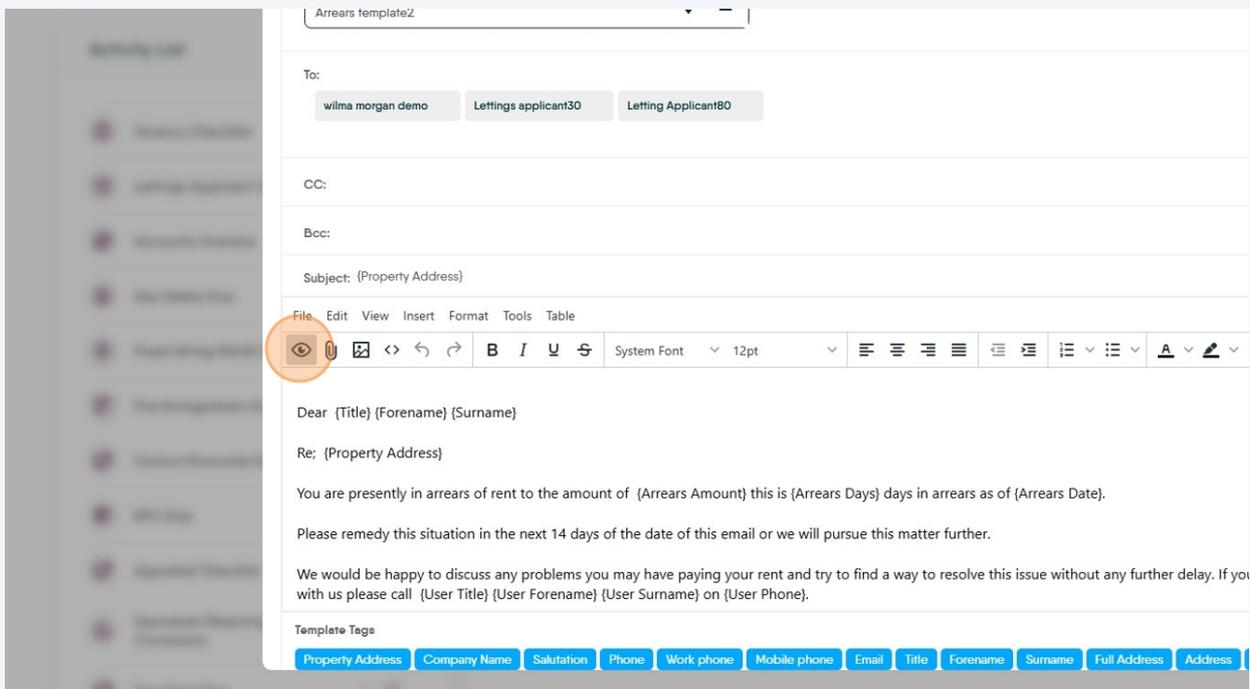
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Negotiator	Tenant	Guarantor	Property
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<input checked="" type="checkbox"/> Training Dave	Lettings applicant30		92 Pelaw Cre
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<input checked="" type="checkbox"/> 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

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 options: File, Edit, View, Insert, Format, Tools, Table. A rich text editor toolbar follows, including icons for undo, redo, bold, italic, underline, link, and various text alignment and color options. The main text area contains a personalized message template with the following content:

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 blue buttons for inserting dynamic content:

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 composition area, a large yellow button labeled 'Send Email' with a right-pointing arrow is highlighted with a red circle.



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 an 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.

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	La
<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

SMS Merge ?

Arthur Morgan Gandalf Grey Gandalf Grey Eve Harmon Villegas

From:

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

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.

From: Arthur Morgan we will be shortly arranging the annual Gas Safety check at 41 Barrett Road, Darlington, County Durham, DL3 8LA, UK

Any Issues contact us @ 01865 860870 Morgan & Co

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

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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Activity List

- Tenancy Checklist 1
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- Fire Extinguishers Due 2
- Carbon Monoxide Due 2
- EPC Due 1
- Appraisal Checklist 1

Accounts Overdue: Gas Safety Due

Export to CSV

Negotiator	Property	La	
<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

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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.

The screenshot shows the 'iamproperty' CRM dashboard. The 'Lettings' section is active, displaying a table of tenants. An orange circle highlights the 'Send Letter' button in the top row of the table. The table has columns for 'Negotiator', 'Tenant', 'Guarantor', and 'Property'. The first row shows 'David-George Morgan' as the negotiator for 'wilma morgan demo' at '63 Woodlan...'. Other rows show 'Training Dave' as the negotiator for various tenants.

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 Cr...
<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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The 'Generate Letters' dialog box is shown. It has a dropdown menu for 'Letters' with the text 'Select letter template'. Below the dropdown are three options: 'Open PDF' (with a PDF icon and a checkmark), 'Download Word document' (with a Word icon), and 'Email as Attachment' (with an email icon). The 'Email as Attachment' option is selected. At the bottom, there are 'Cancel' and 'Perform Merge' buttons. The 'Perform Merge' button is highlighted in orange. Below the options, it says 'Document(s) will be opened in a new tab'.

