

Adding a Logo and Merge Fields to a Letter Template in CRM



This guide provides a step-by-step process for adding a logo to a letter template in iamproperty CRM, enhancing your branding and professionalism in communications. Also this guide shows how to add merge tags to automatically add client data.

By following these clear instructions, you can easily customise letters for your lettings applicants. This guide will save you time and help you maintain consistency across your correspondence, ultimately improving your business's image.

- 1 When creating a letter to be uploaded to CRM the letter must be created and saved in .RTF format. This can easily be done in MS Word or other similar software.

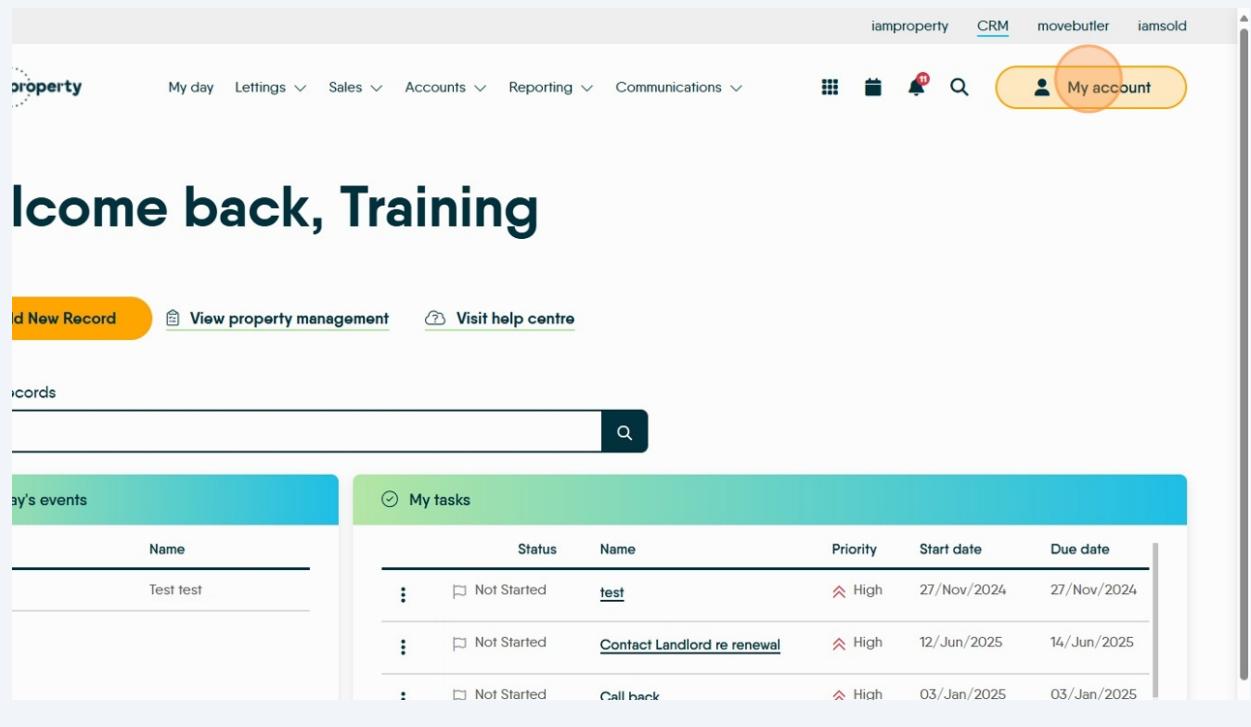
- 2 Navigate to <https://crm.iamproperty.com/MyDay>

A screenshot of the iam property CRM interface. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and a search bar. Below the navigation is a 'Welcome back, Training' message. On the left, there are two sections: 'Today's events' (listing a single event at 12:00) and 'My tasks' (listing four tasks: 'test', 'Contact Landlord re renewal', 'Call back', and 'Make Tea').

Time	Name
12:00	Test test

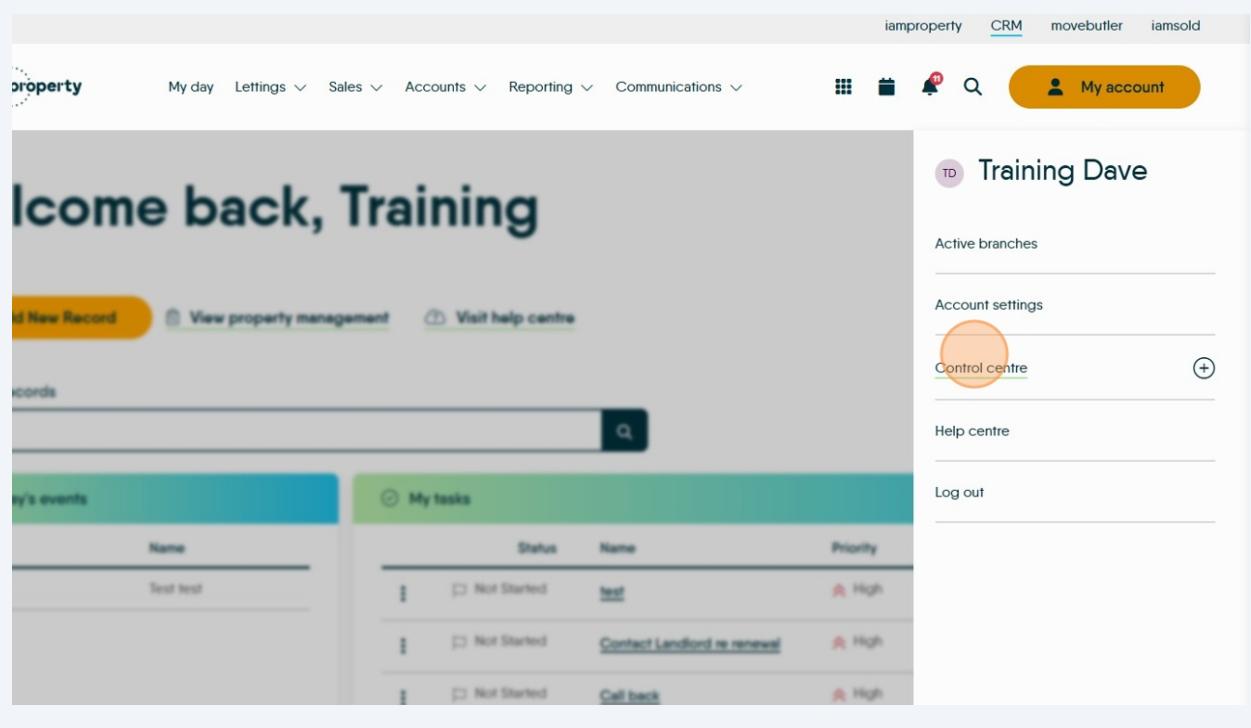
Status	Name	Priority	Start date	Due date
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Contact Landlord re renewal	High	12/Jun/2025	14/Jun/2025
Not Started	Call back	High	03/Jan/2025	03/Jan/2025
Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

3 Click "My account"



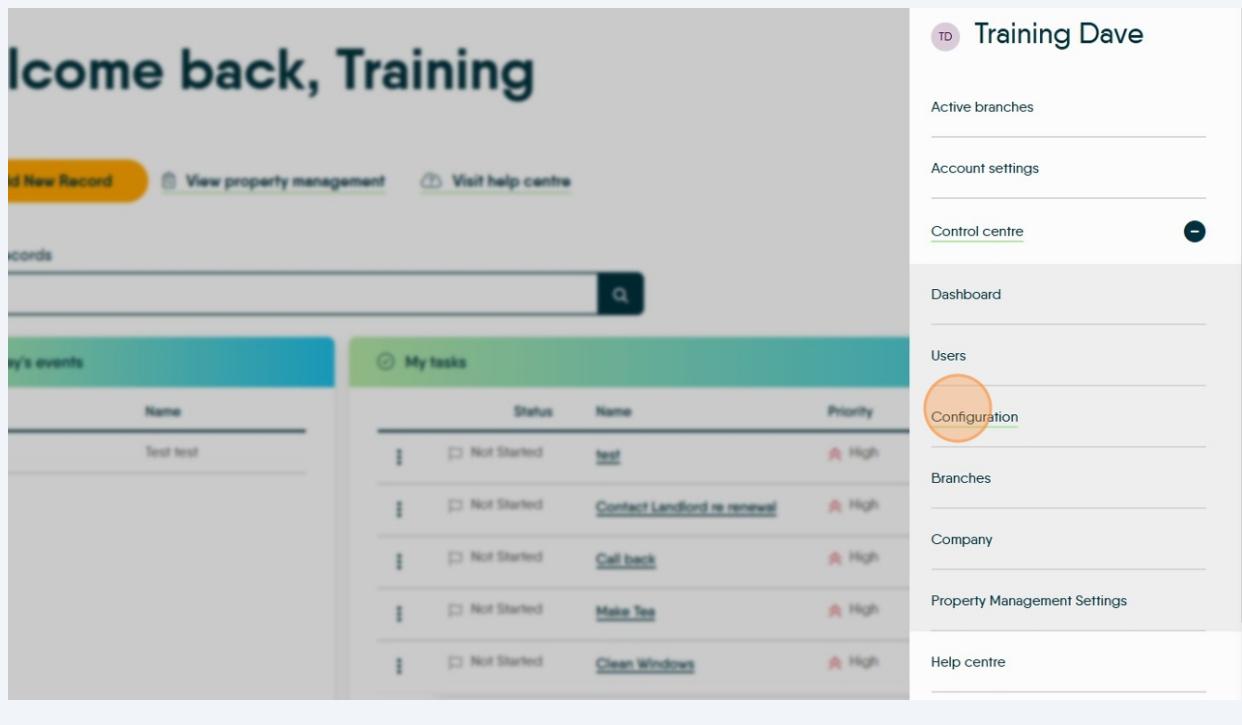
The screenshot shows the iProperty software interface. At the top, there is a navigation bar with links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. On the right side of the top bar, there are icons for a grid, a calendar, a bell with a notification count of 11, a magnifying glass, and a user profile. The 'My account' button is highlighted with an orange circle. Below the top bar, the main content area has a title 'Income back, Training' and several buttons: 'Add New Record', 'View property management', and 'Visit help centre'. There is also a search bar. The main content area is divided into sections: 'My events' (with a table showing 'Test test') and 'My tasks' (with a table showing three tasks: 'test' (High priority, due 27/Nov/2024), 'Contact Landlord re renewal' (High priority, due 14/Jun/2025), and 'Call back' (High priority, due 03/Jan/2025)).

4 Click "Control centre"



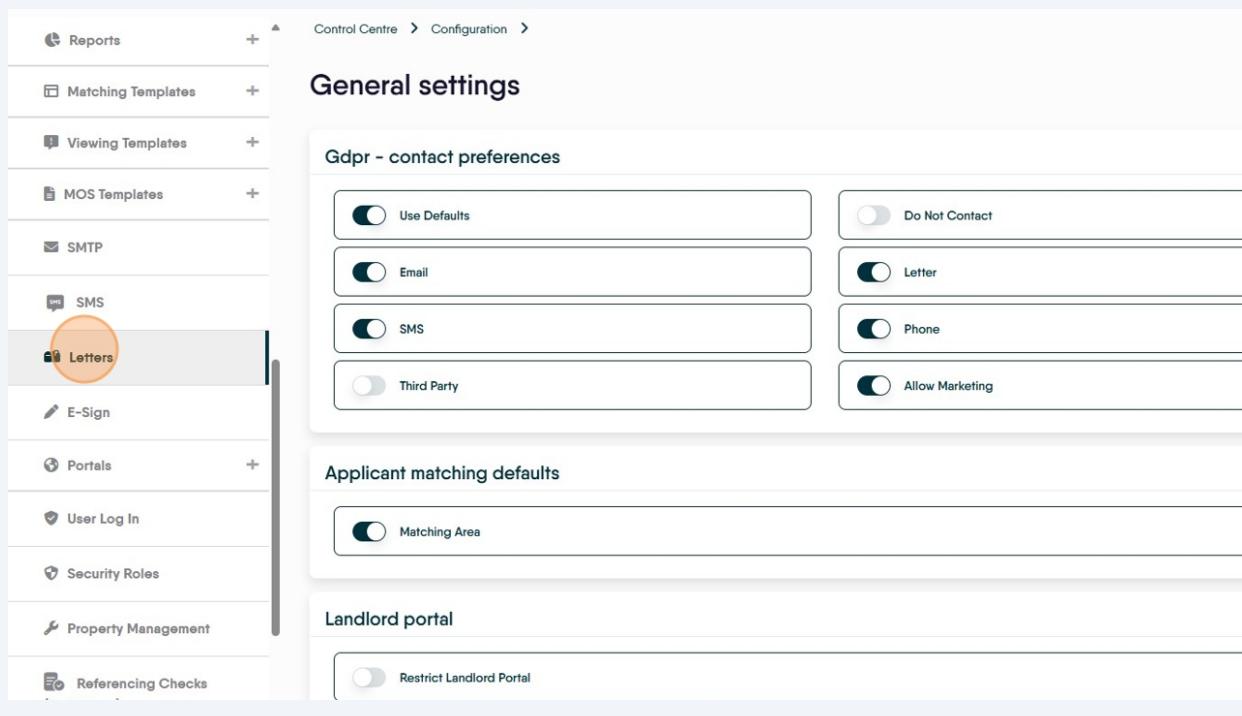
The screenshot shows the iProperty software interface, similar to the previous one but with a different sidebar. The top navigation bar and main content area are the same. The sidebar on the right is titled 'Training Dave' and contains the following sections: 'Active branches' (empty), 'Account settings' (with a 'Control centre' button highlighted with an orange circle), 'Help centre' (empty), and 'Log out' (empty). The 'Control centre' button is also highlighted with an orange circle in the main content area's 'My tasks' table, which shows the same three tasks as the previous screenshot.

5 Click "Configuration"



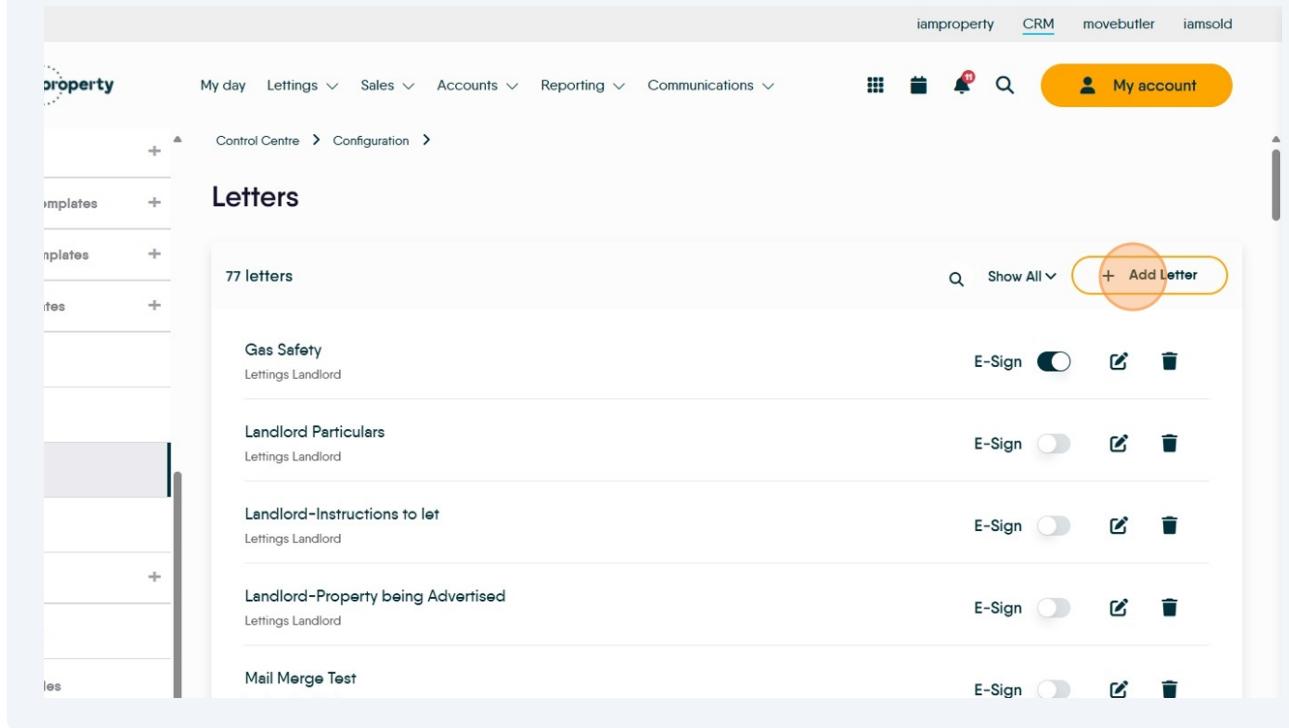
The screenshot shows a software interface with a top navigation bar and a sidebar on the right. The top bar includes 'New Record', 'View property management', and 'Visit help centre'. The sidebar, titled 'Training Dave', lists various sections: 'Active branches', 'Account settings', 'Control centre' (which is underlined and has a minus sign), 'Dashboard', 'Users' (with 'Configuration' highlighted and circled in orange), 'Branches', 'Company', 'Property Management Settings', and 'Help centre'. The main content area shows a 'My tasks' list with five items: 'test' (Status: Not Started, Priority: High), 'Contact Landlord re renewal' (Status: Not Started, Priority: High), 'Call back' (Status: Not Started, Priority: High), 'Make Tea' (Status: Not Started, Priority: High), and 'Clean Windows' (Status: Not Started, Priority: High). A search bar is at the top of the main content area.

6 Scroll down and Click "Letters"



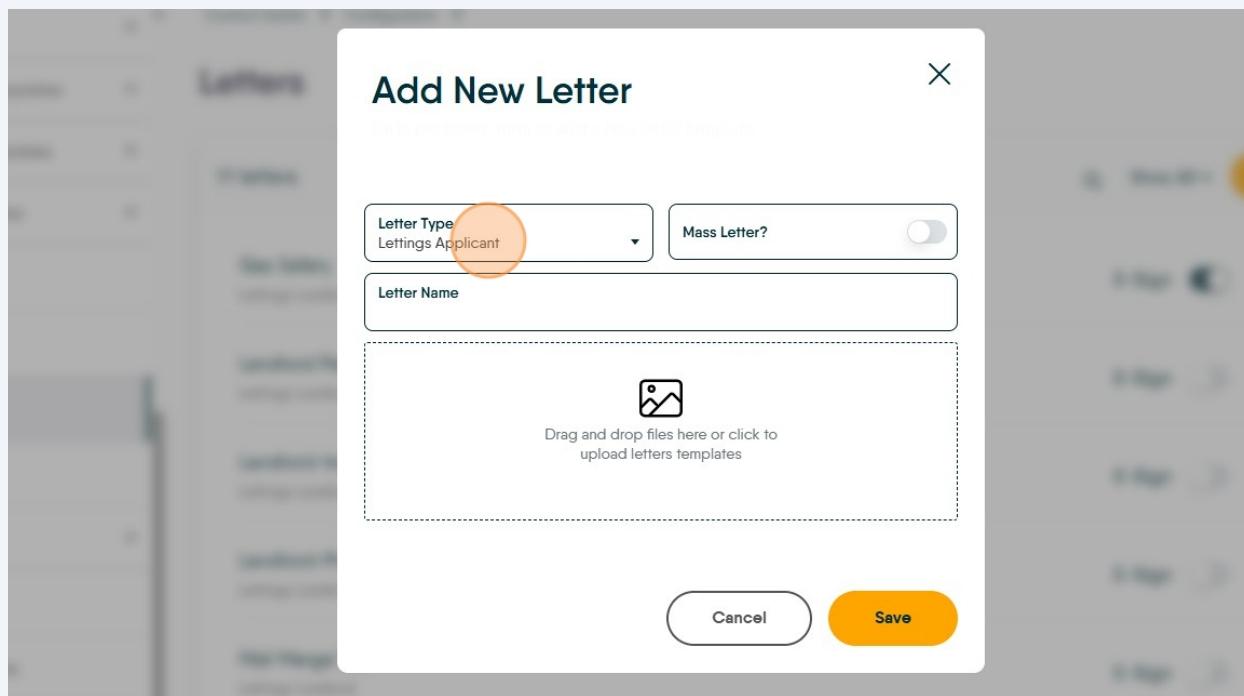
The screenshot shows the 'Letters' configuration page. The left sidebar lists 'Reports', 'Matching Templates', 'Viewing Templates', 'MOS Templates', 'SMTP', 'SMS', 'Letters' (which is highlighted and circled in orange), 'E-Sign', 'Portals', 'User Log In', 'Security Roles', 'Property Management', and 'Referencing Checks'. The main content area is titled 'General settings' and contains three sections: 'Gdpr - contact preferences' (with 'Use Defaults' and 'Do Not Contact' toggle switches), 'Applicant matching defaults' (with 'Matching Area' toggle switch), and 'Landlord portal' (with 'Restrict Landlord Portal' toggle switch).

7 If you are adding a new letter click "Add Letter" otherwise follow this guide from step 13.



The screenshot shows the 'Letters' section of a software interface. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'Control Centre', and 'Configuration'. On the right, there are icons for 'iamproperty', 'CRM', 'movebutler', 'iamsold', and 'My account'. Below the navigation, the page title is 'Letters' with a subtitle '77 letters'. A search bar and a 'Show All' dropdown are on the right. The main area lists five sample letters: 'Gas Safety', 'Landlord Particulars', 'Landlord-Instructions to let', 'Landlord-Property being Advertised', and 'Mail Merge Test'. Each letter entry includes an 'E-Sign' toggle switch, a pencil icon for editing, and a trash can icon for deletion.

8 Click "Letter Type" and select the recipient you are creating the letter for.



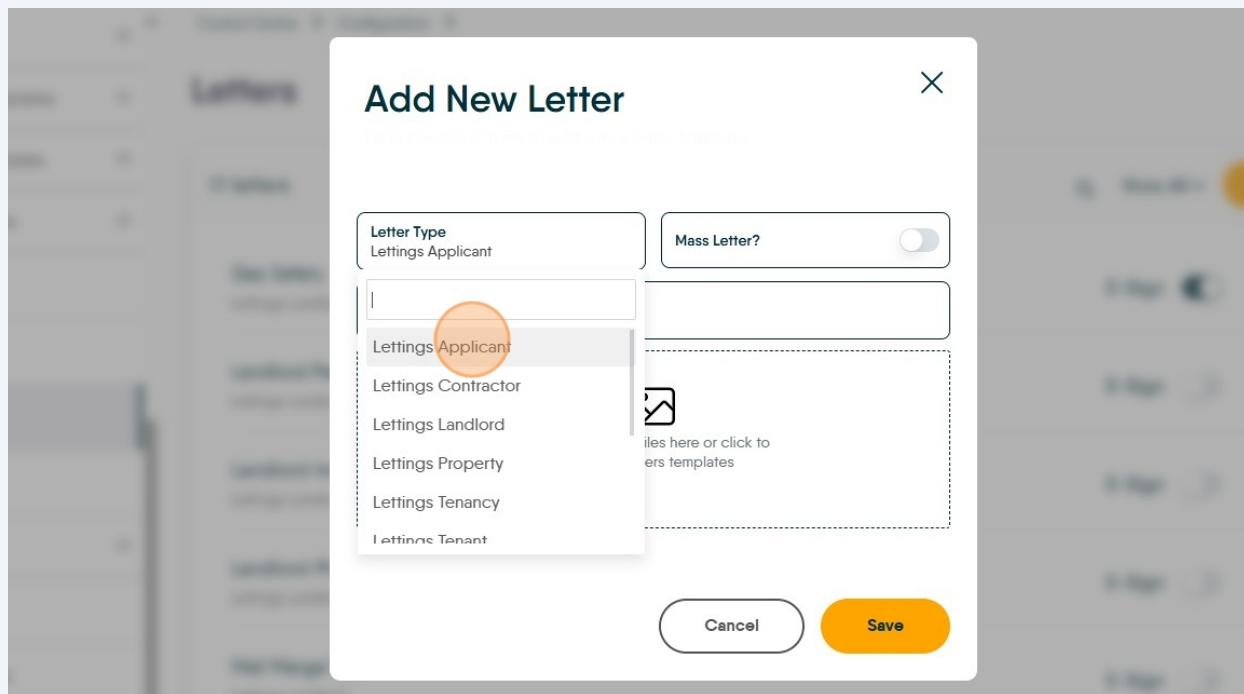
The screenshot shows the 'Add New Letter' dialog box. It has a title 'Add New Letter' and a close button 'X'. Below the title, there is a note: 'Select the letter type and recipient you are creating the letter for.' The 'Letter Type' dropdown is set to 'Lettings Applicant' and is highlighted with an orange circle. To its right is a 'Mass Letter?' toggle switch, which is turned off. Below the dropdown is a 'Letter Name' input field. At the bottom of the dialog is a dashed box for 'Drag and drop files here or click to upload letters templates', with a small image icon inside. At the very bottom are 'Cancel' and 'Save' buttons, with 'Save' being highlighted with an orange circle.



Alert! When creating a letter in CRM it is important you create the correct letter type in the Add New Letter section. If you select Lettings Applicant as the letter type, this letter will only be available in the Lettings Applicant area of CRM and NOT in another section e.g. Landlord. If you want a letter in multiple places it needs to be created into those areas.

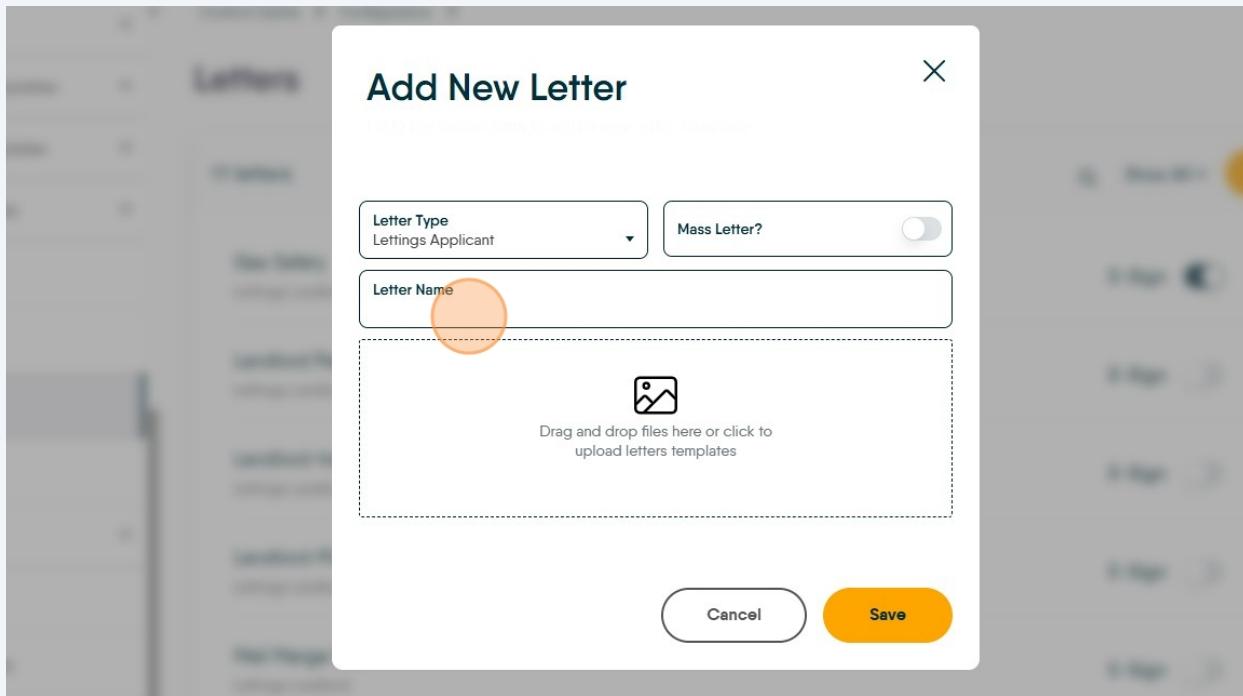
9

Click and select the letter type from the drop down menu.



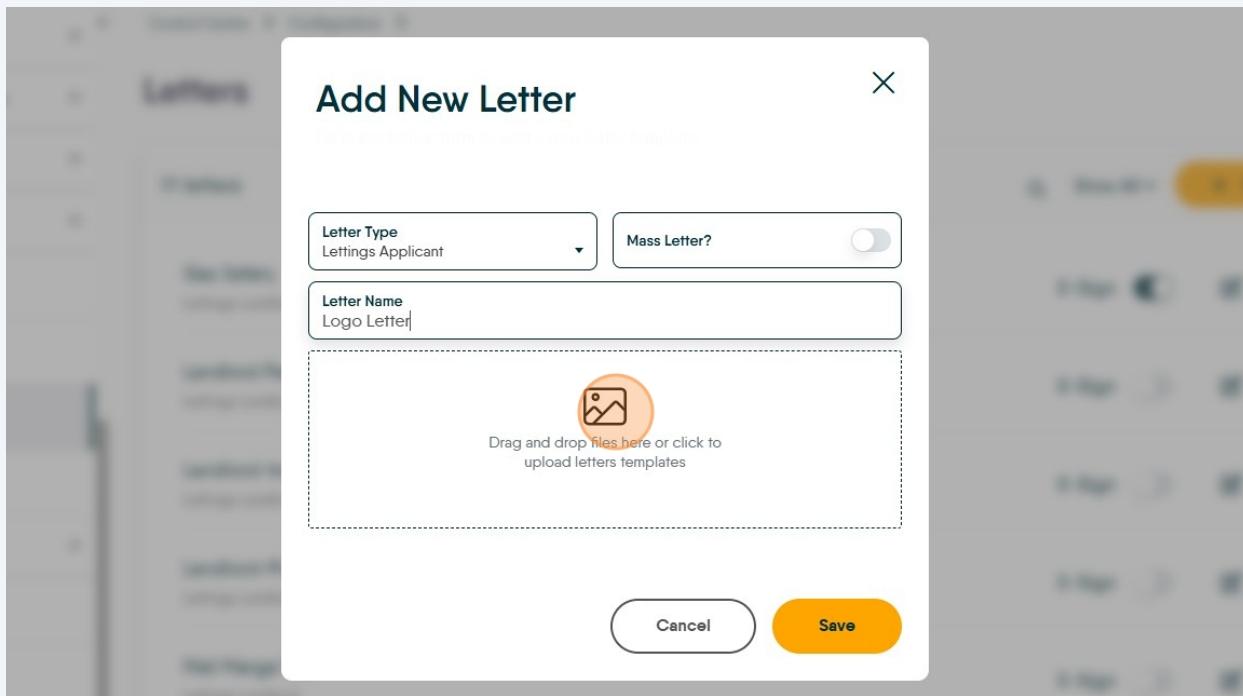
10

Click the "Letter Name" field, name your letter as you would like it to be seen in CRM

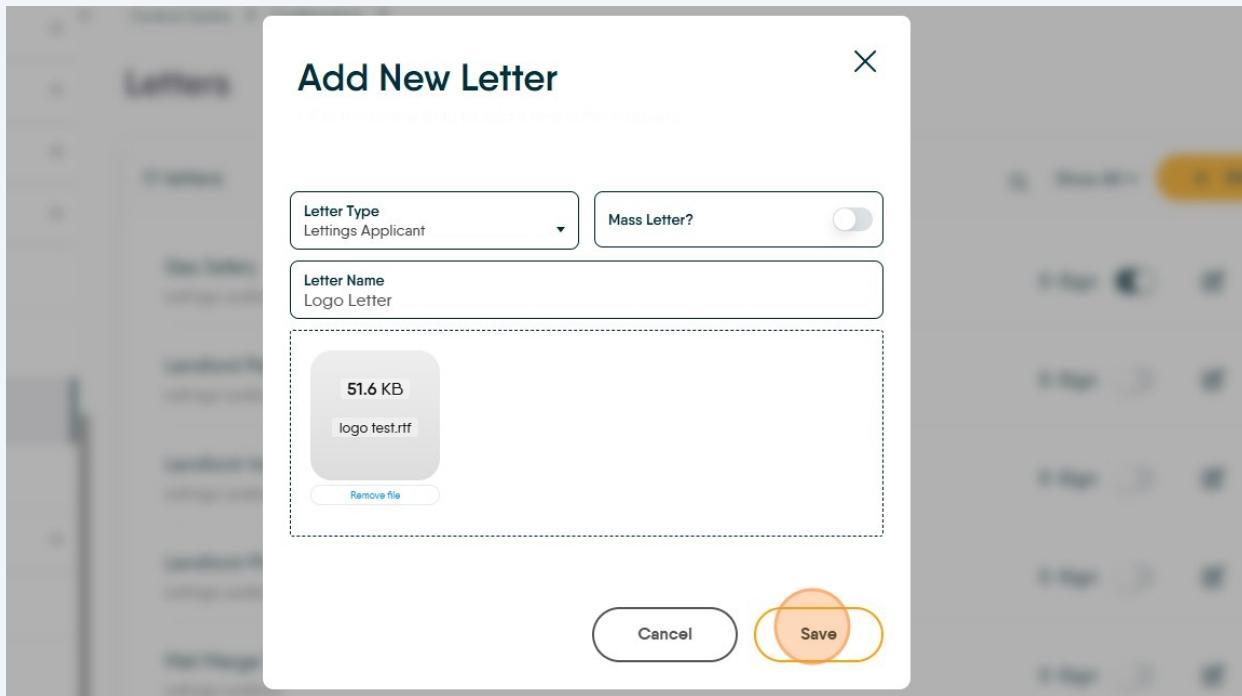


11

Click "Drag and drop files here or click to upload letters templates" this will take you to a documents screen where you can search for and find your letter.



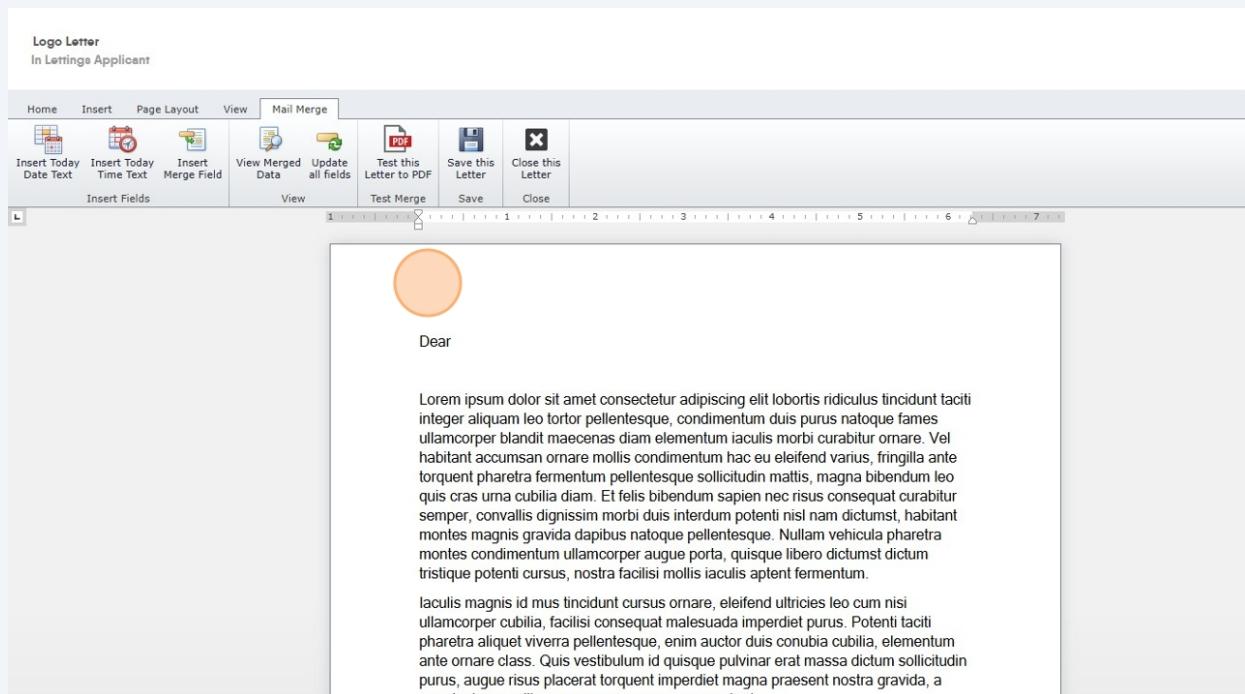
12 Once your document is added click "Save"



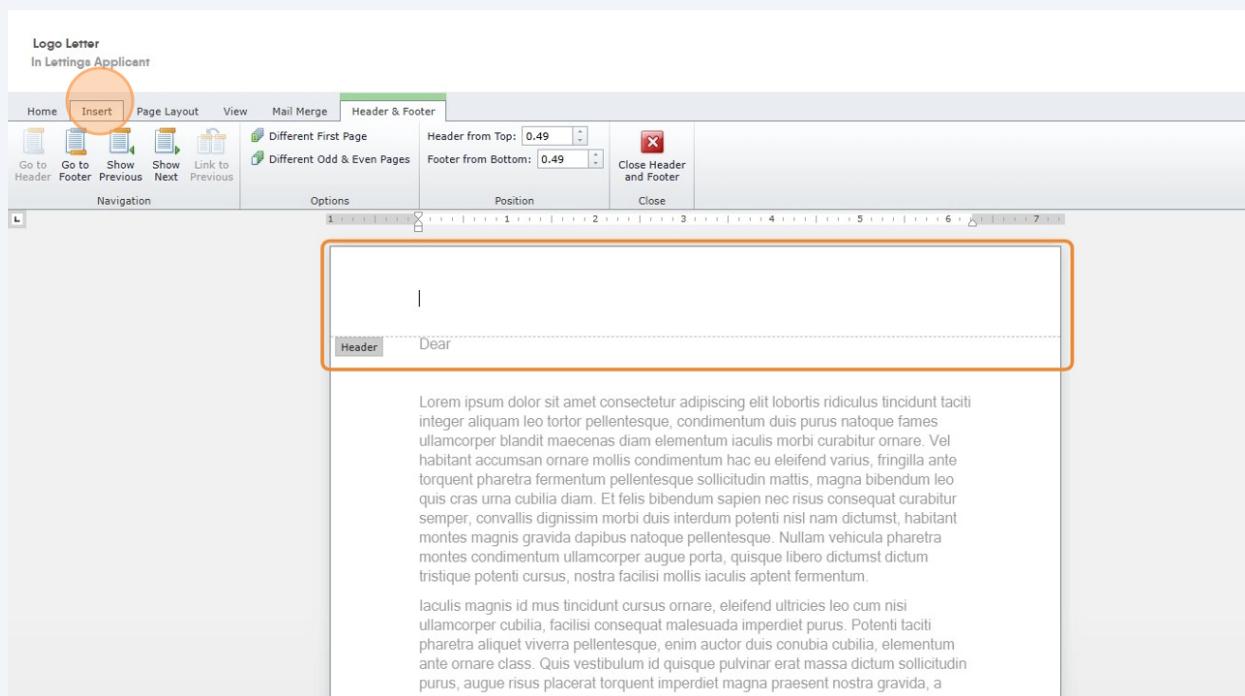
Adding the Logo/Editing the Letter

13 In the letters menu of CRM scroll to find the letter you have just added, it will most likely be at the end of the list. Click here to open the editor.

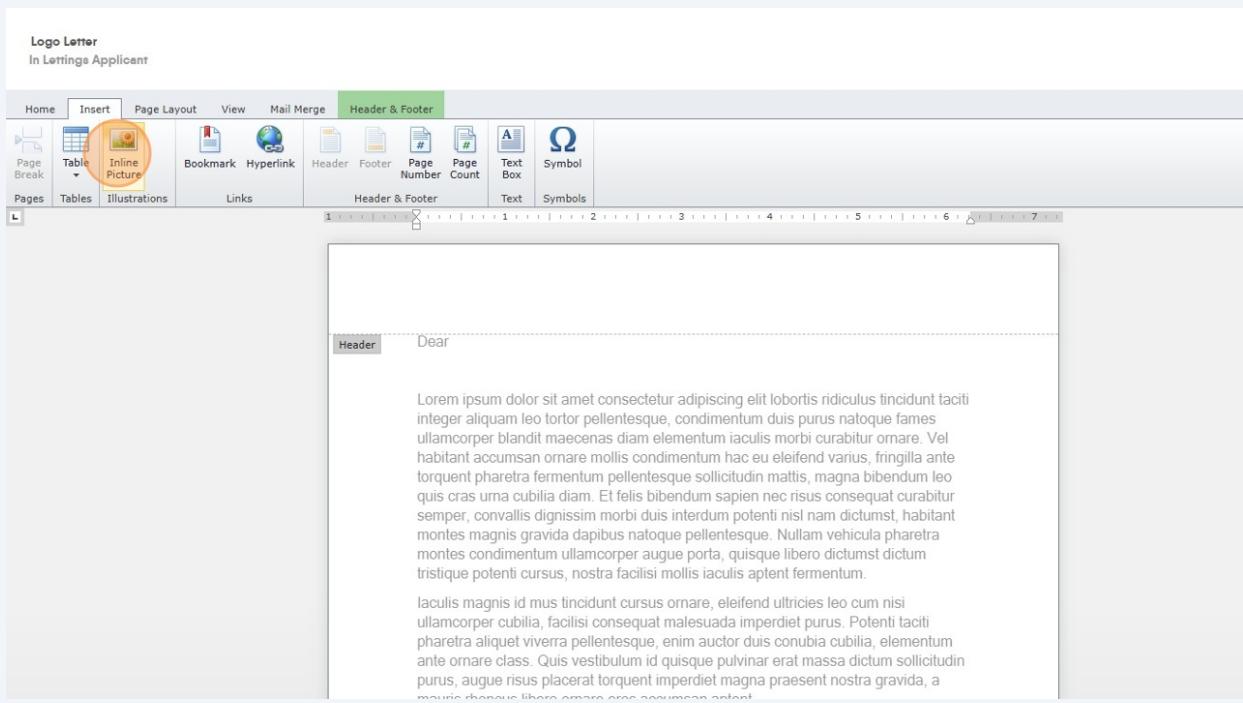
14 Double-click at the top of the screen to open the 'Header' of your document.



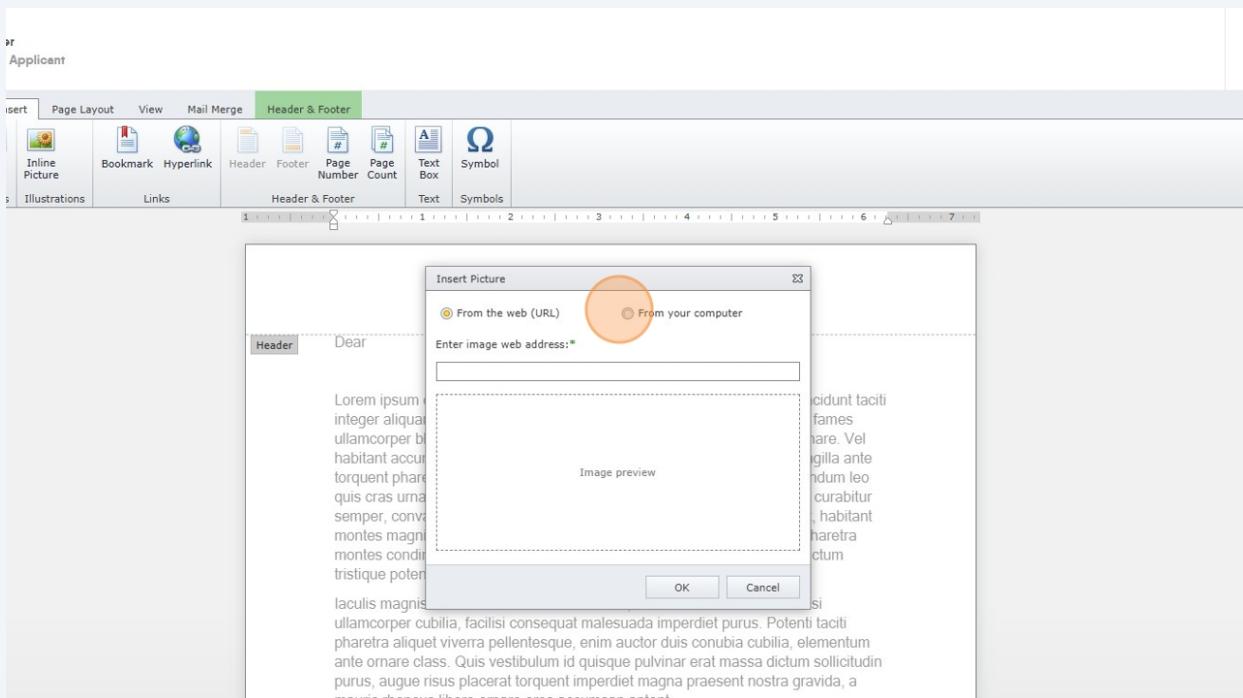
15 Click "Insert"



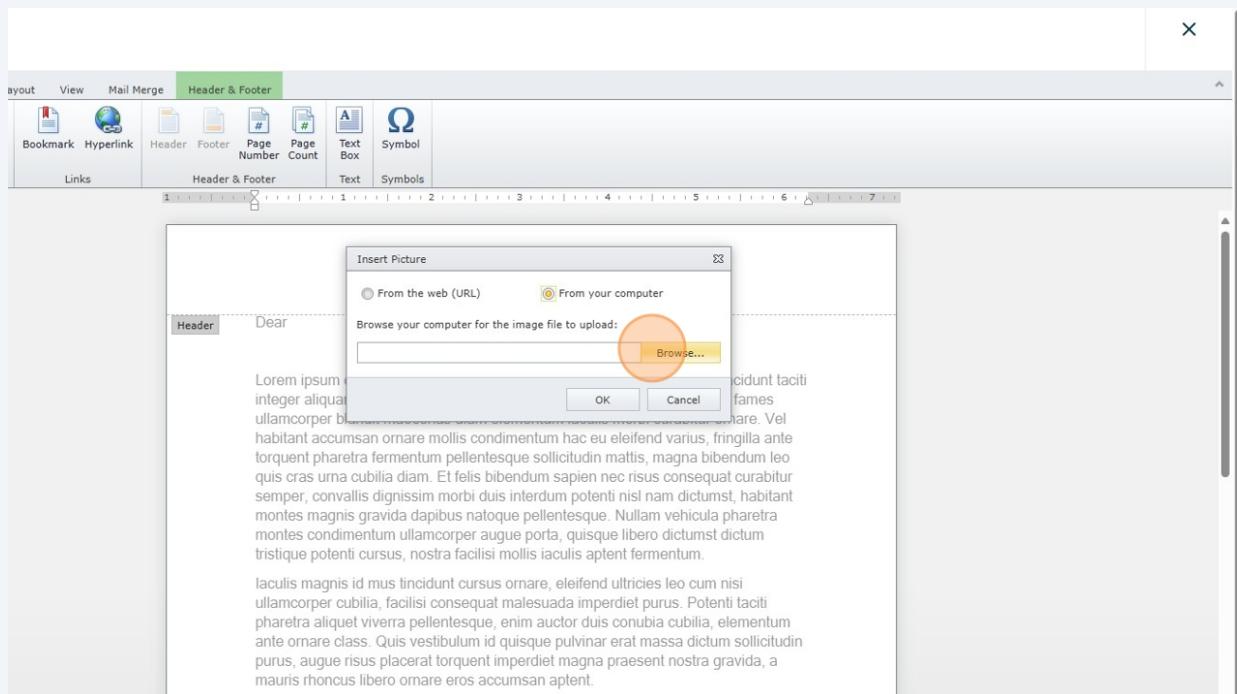
16 Click "Inline Picture"



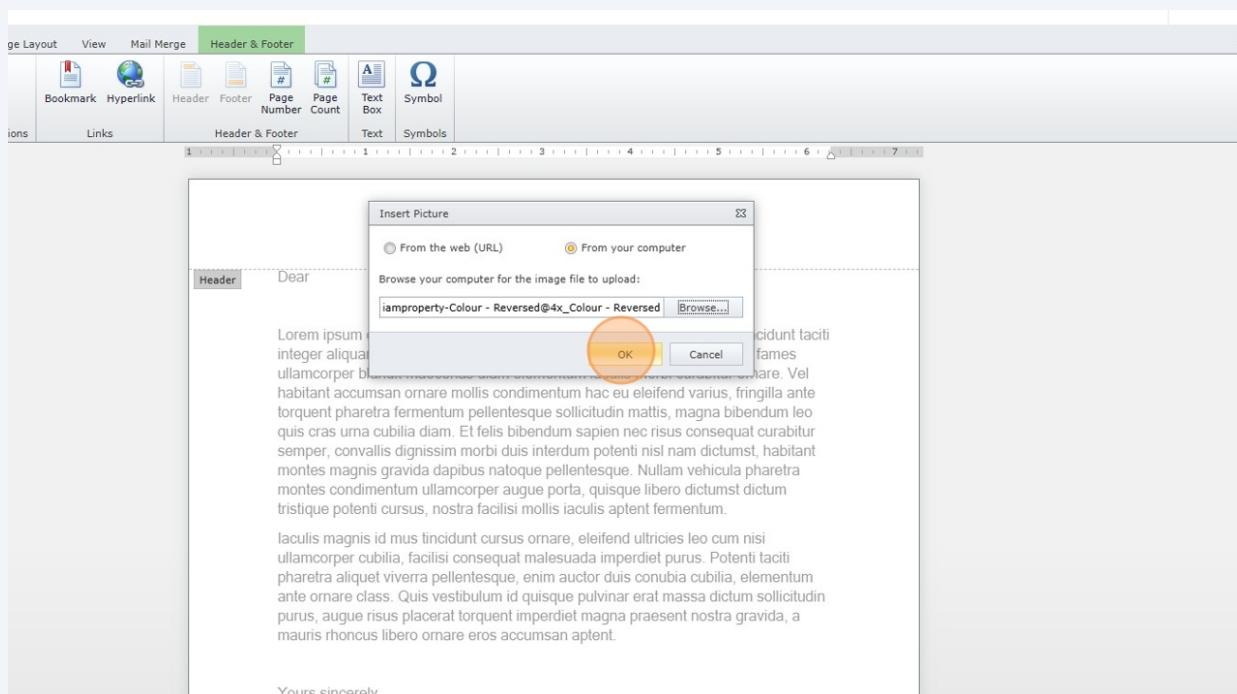
17 In the 'Insert Picture' section you can link to an image on the internet or (most likely) find an image on your computer and link to that.



18 Click the "Browse your computer for the image file to upload:" field.

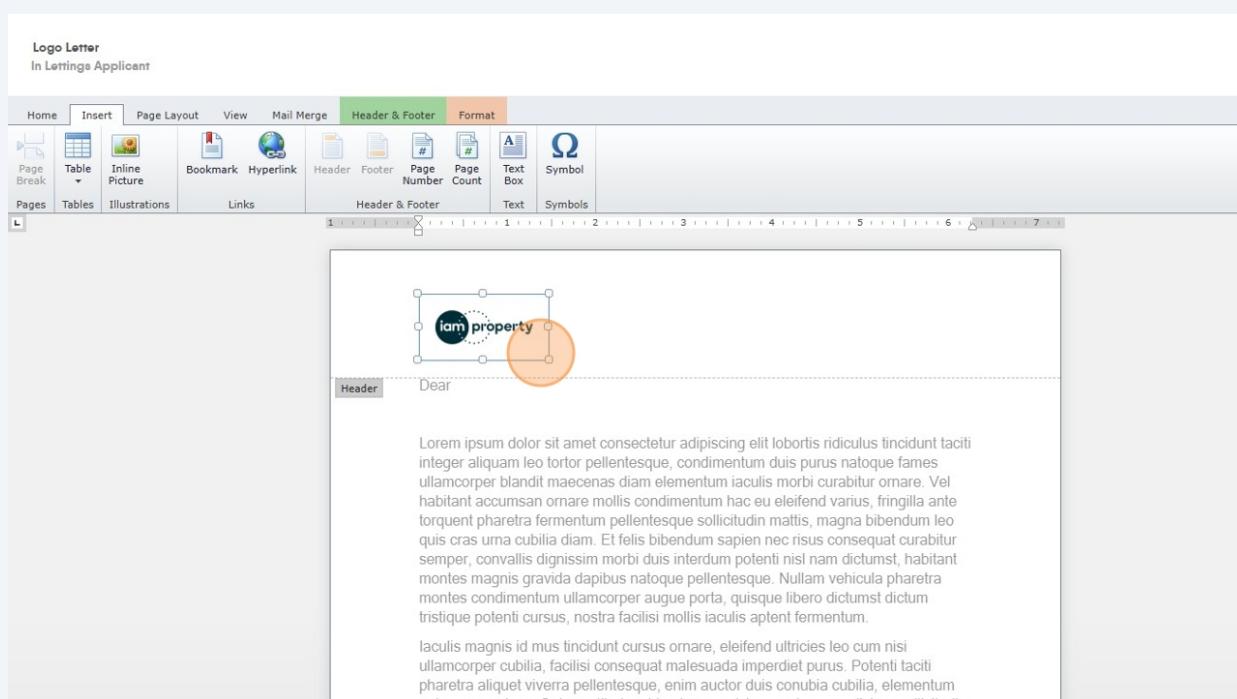
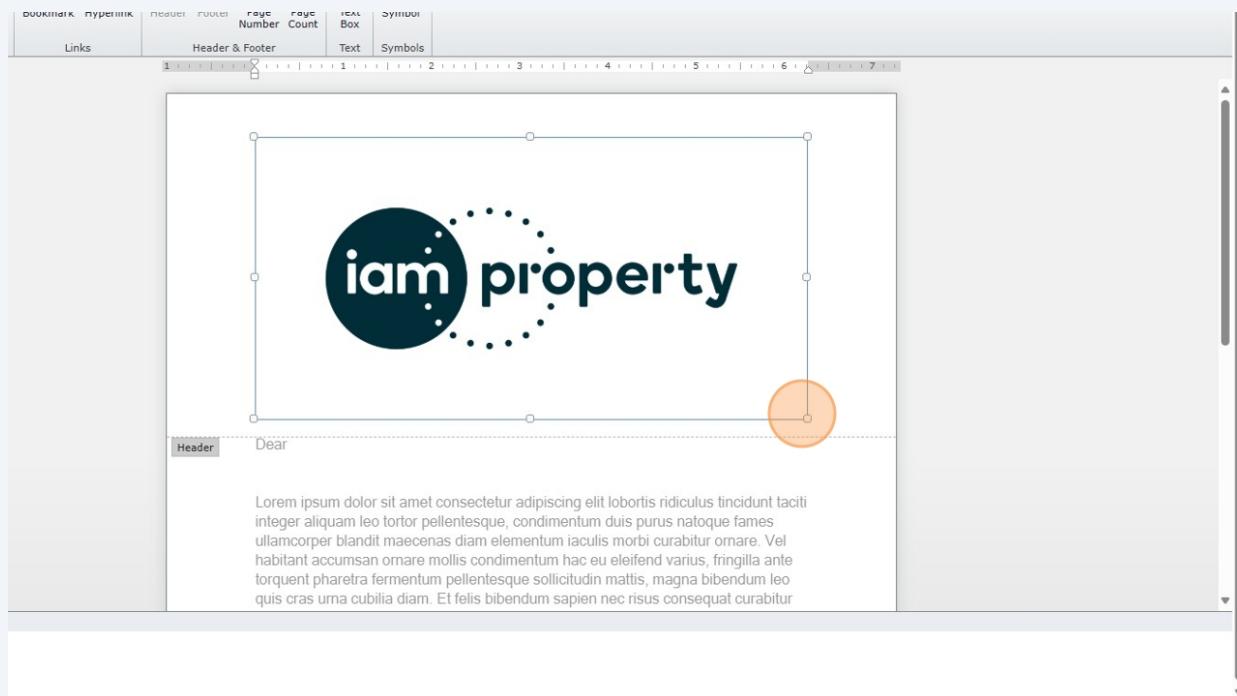


19 Once the image is found. Click "OK"

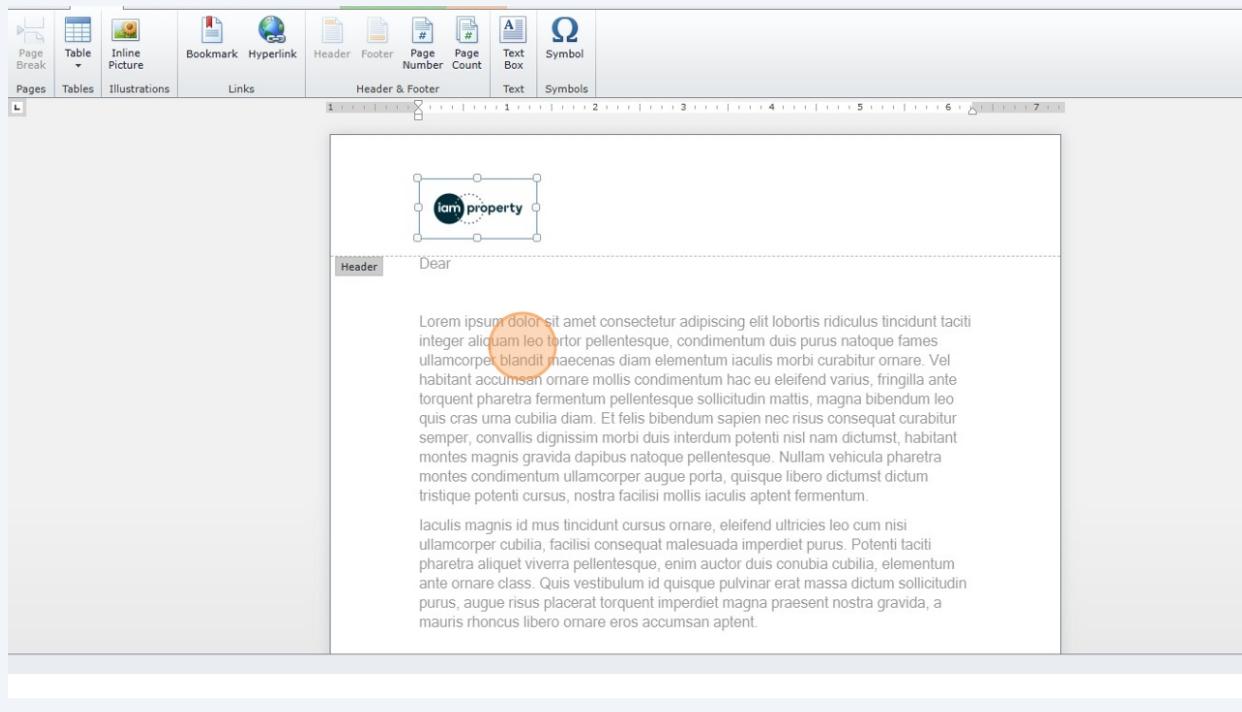


20

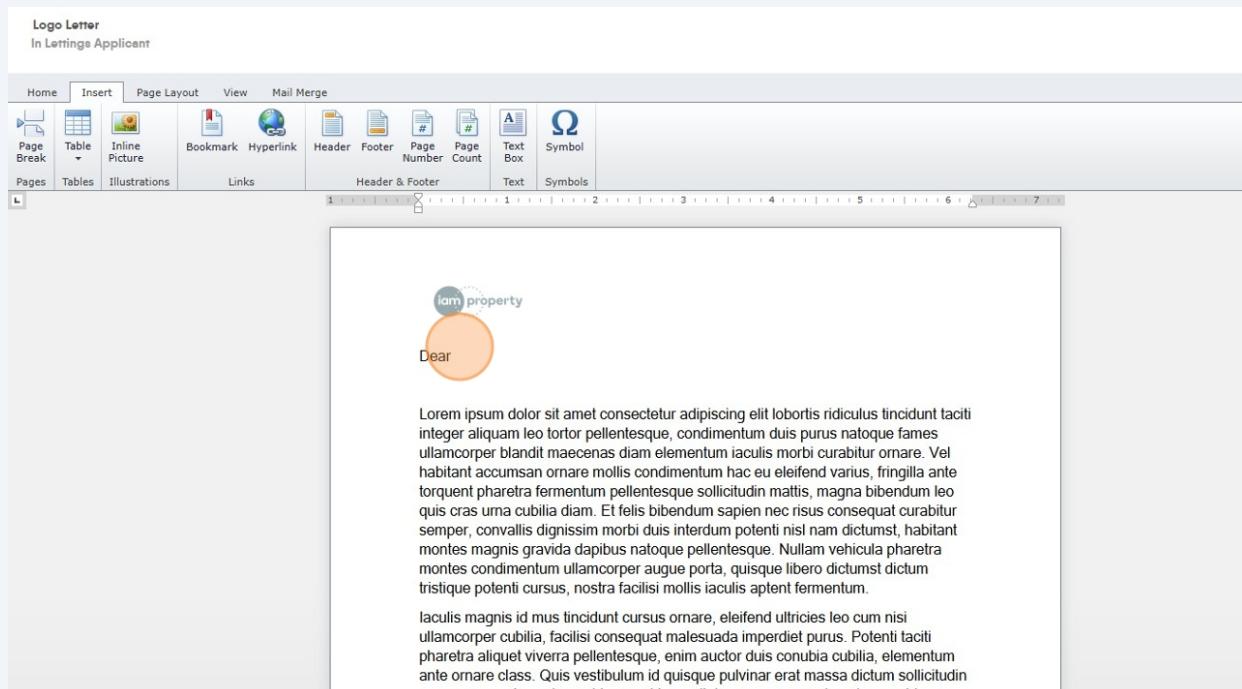
Your image will load, click onto it and use the options to re-size the image to fit your document. Click here.



21 Click onto the main field of your letter to close the Header and set the image.



22 Your image is then set as part of your letter.



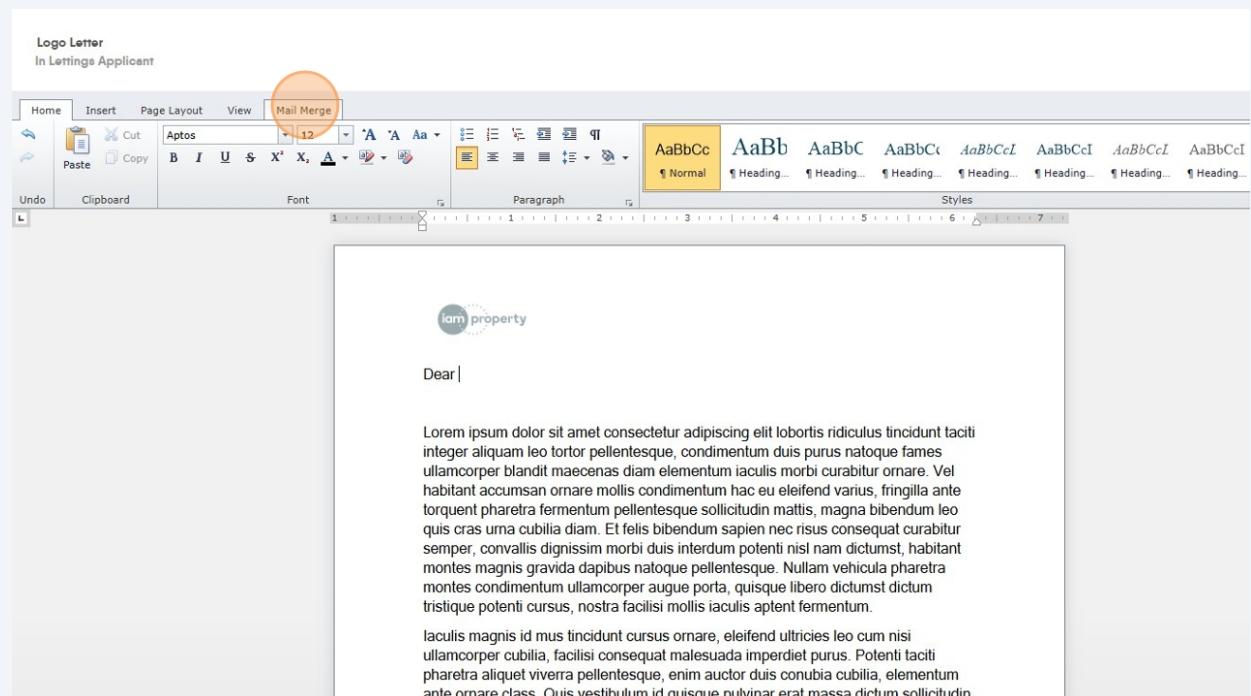
Updating Merge Tags

23

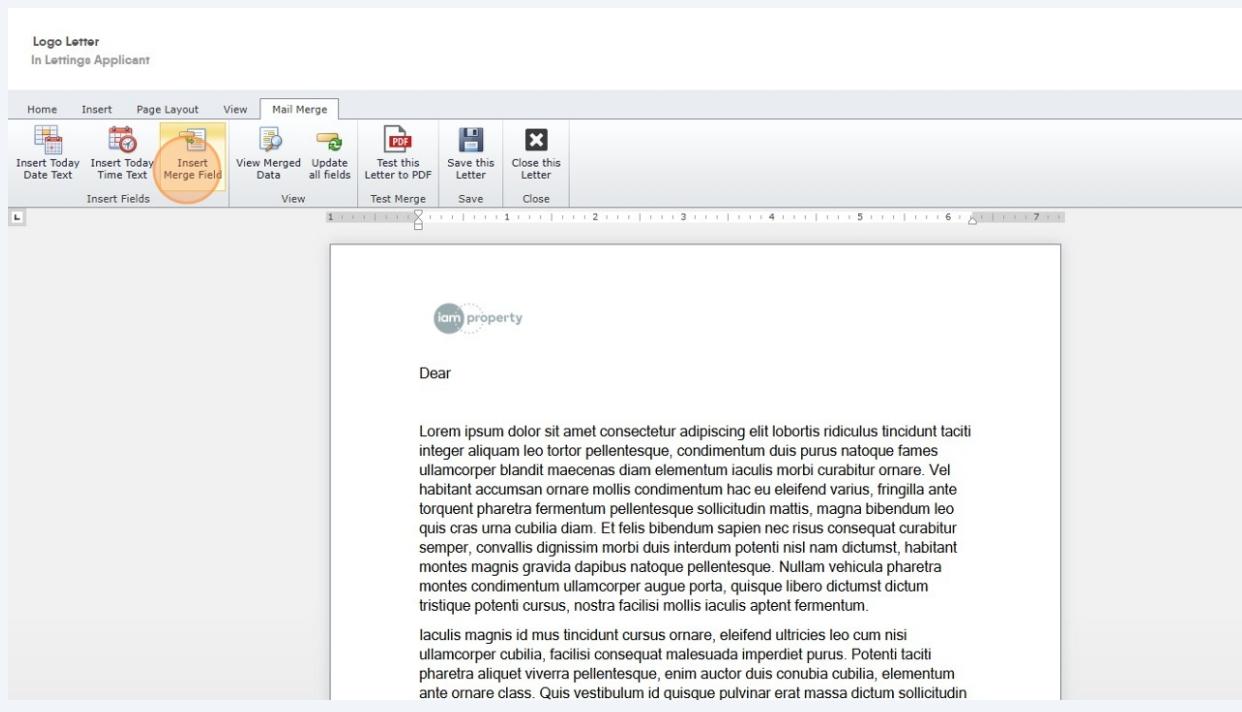
Merge Tags allow data - names, addresses, property details etc. - to be added automatically to a letter to produce a personalised document.

24

Click "Mail Merge"



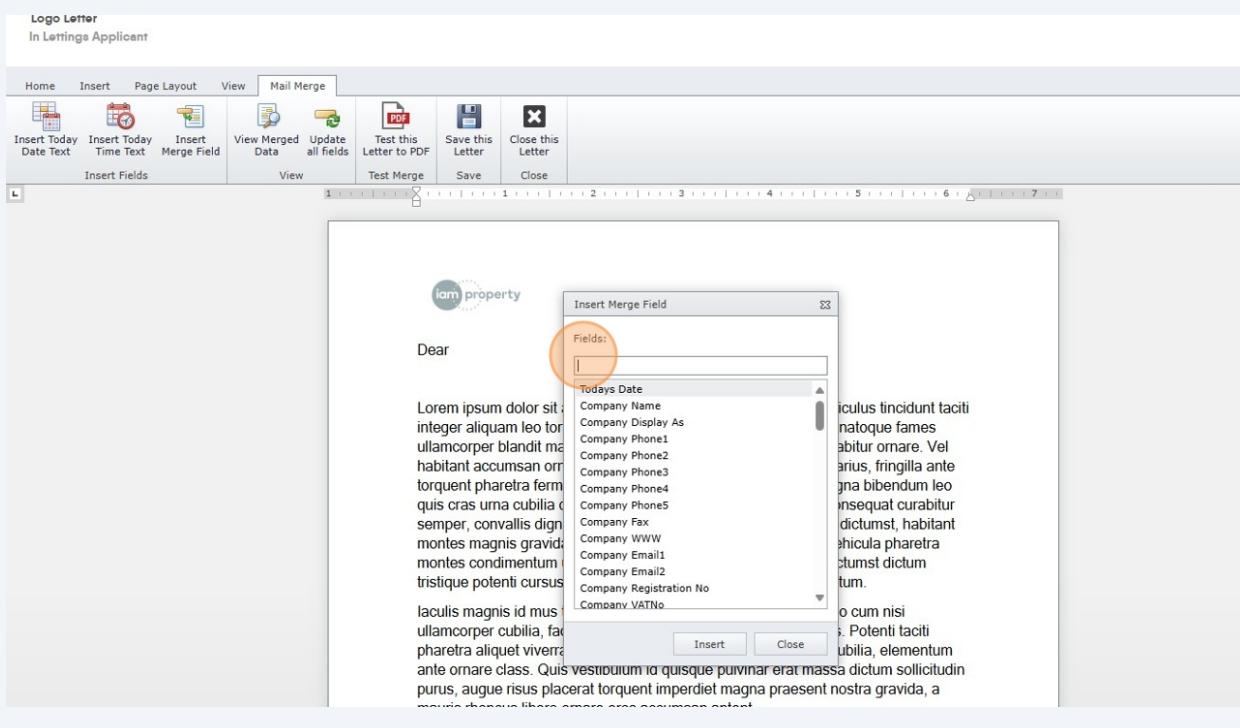
25 Click "Insert Merge Field"



Tip! When adding merge fields it is best practice to search for the field you require rather than scroll the list, there are so many merge fields available that scrolling is NOT advised,

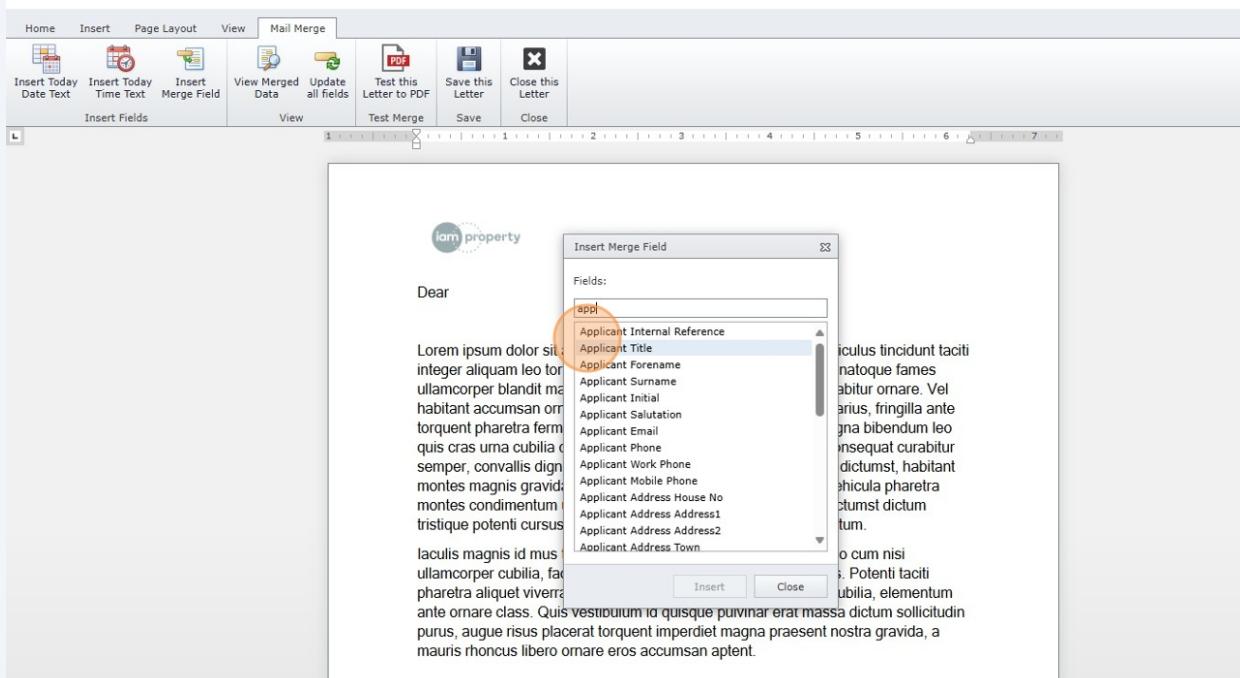
26

The 'Insert Merge Field' box will show on the screen, this can be moved to a different part of the screen if required. Click the "Fields:" field.



27

If we wanted to add the Applicant details, we would place the cursor on the screen where we want the tags to be added e.g. next to 'Dear'. Then in the search field search for the the option required e.g. Applicant Title, Click "Applicant Title"



28

Click "Insert" to add the tag to the place where the cursor is set. You can continue to select merge fields and adding them from the list and they will be added next to the first tag.

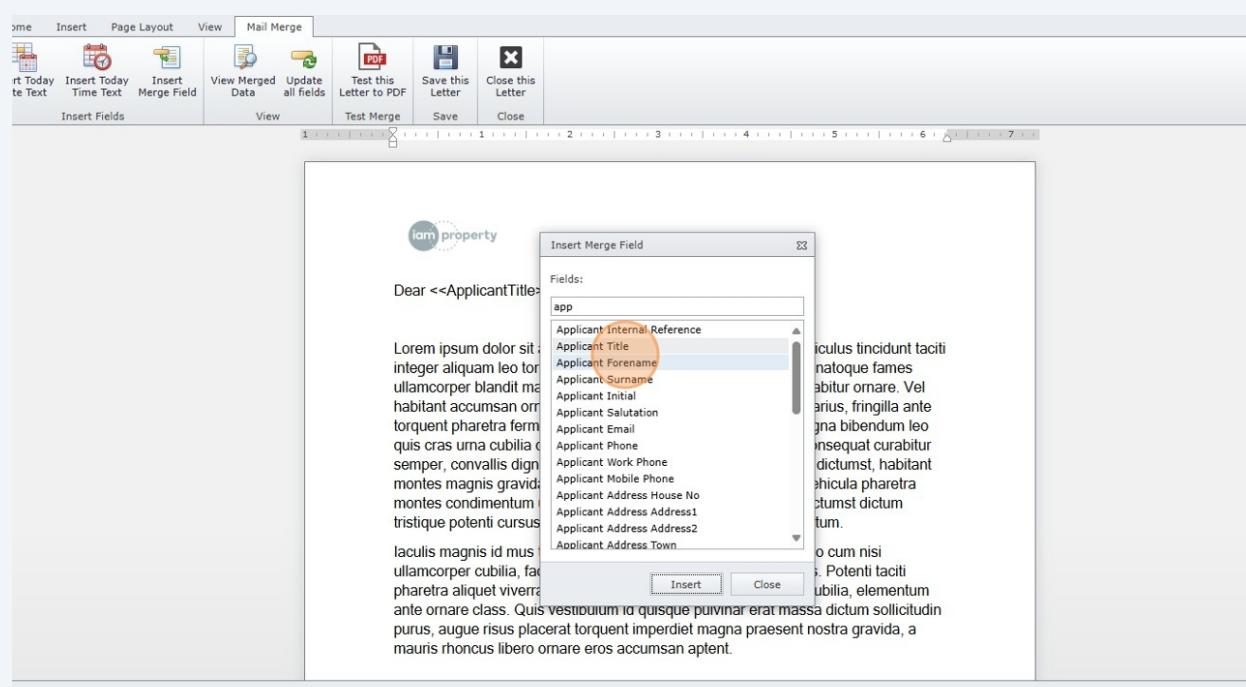
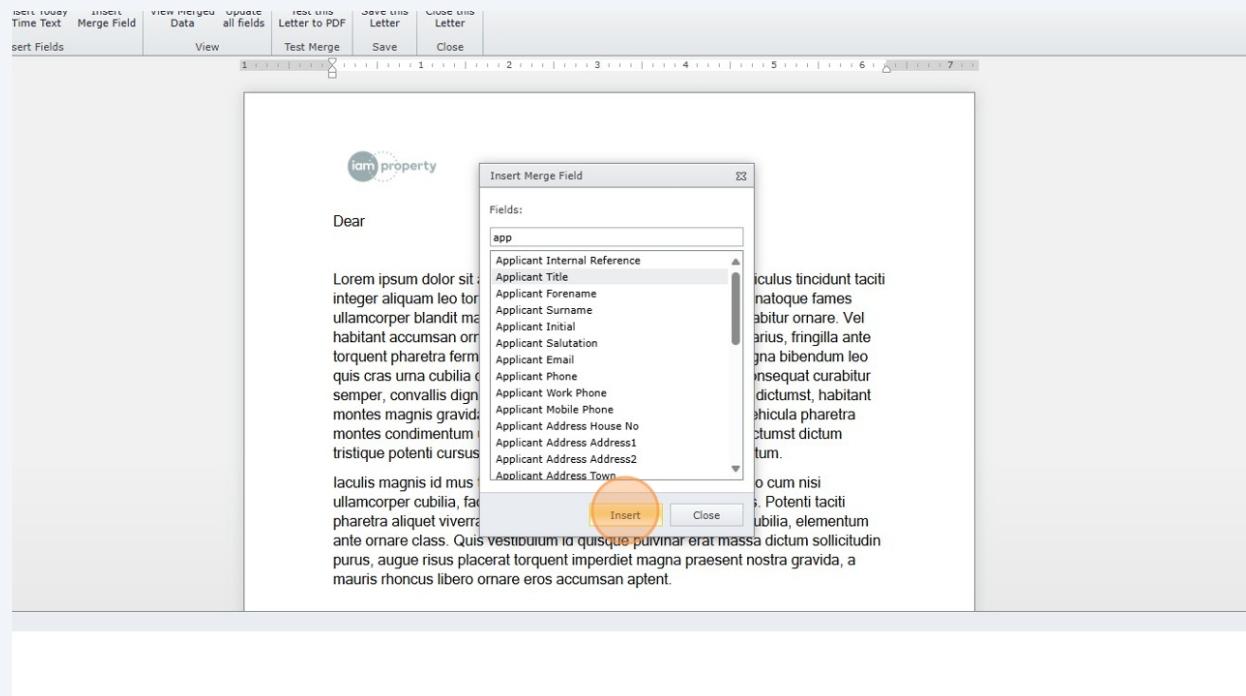
Click "Applicant Forename"

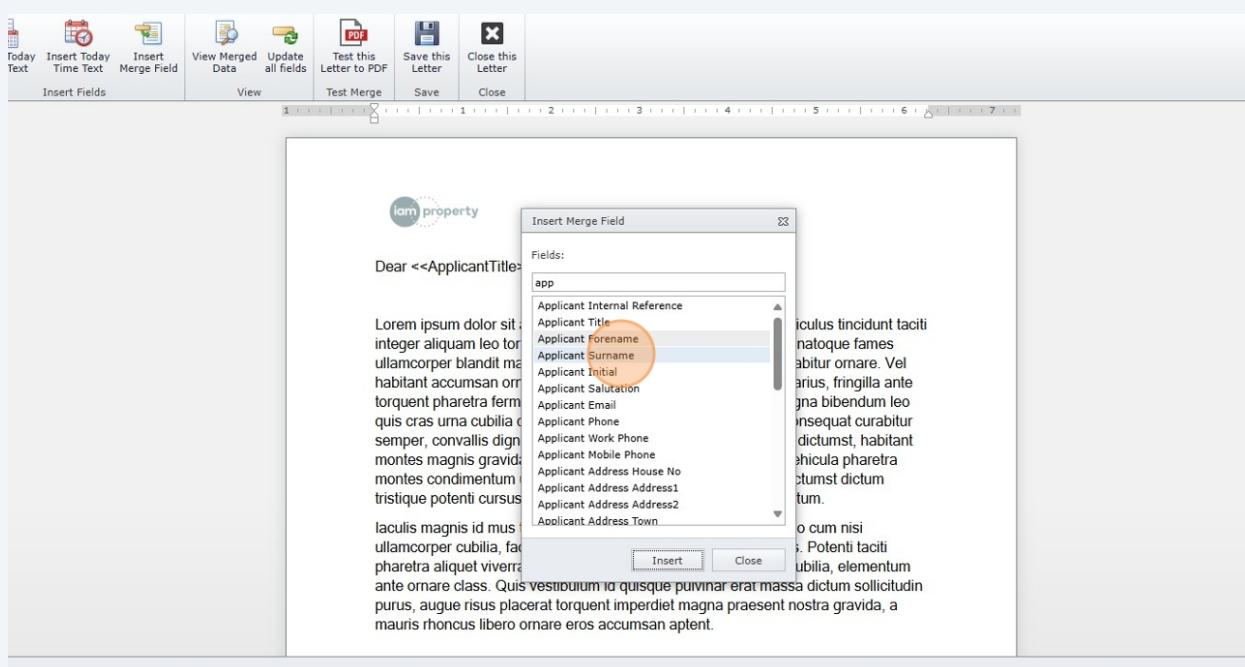
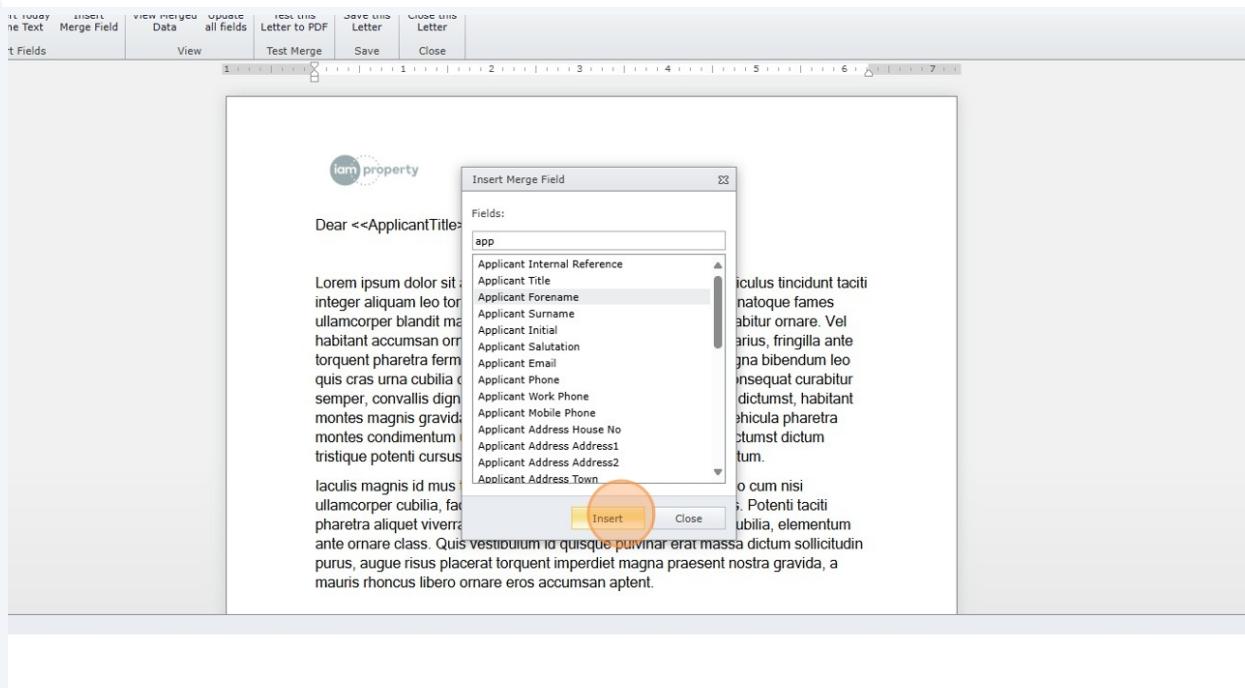
Click "Insert"

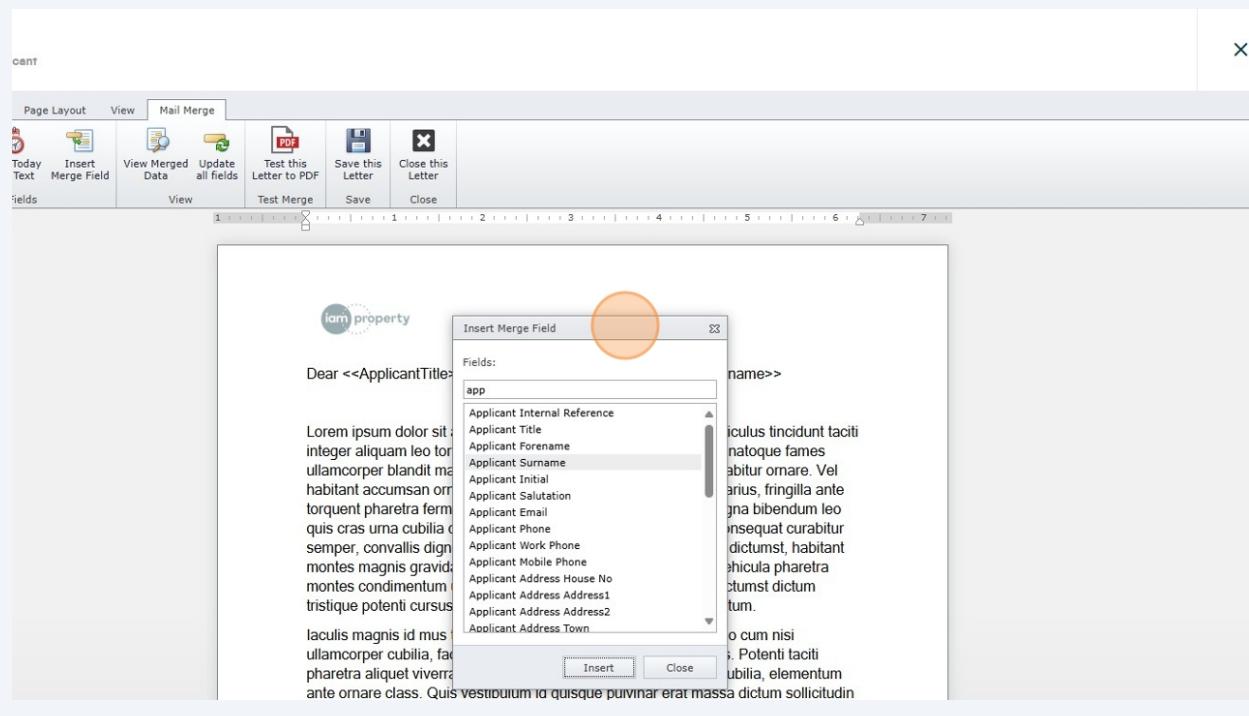
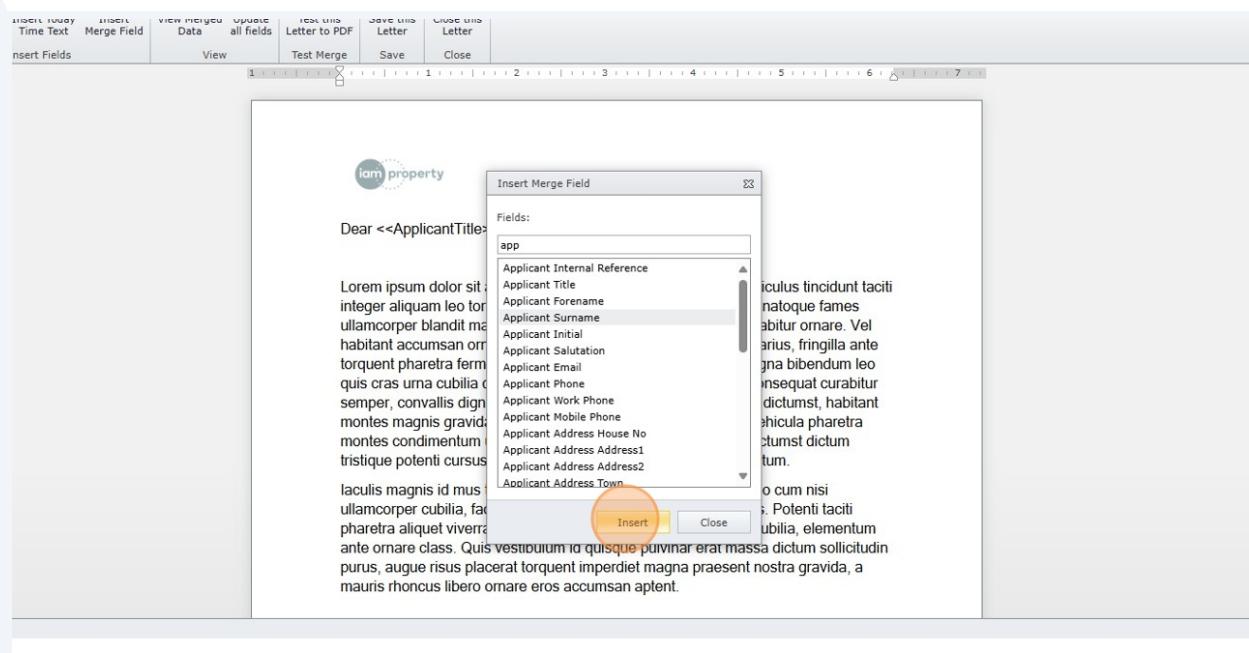
Click "Applicant Surname"

Click "Insert"

Click "Insert Merge Field"

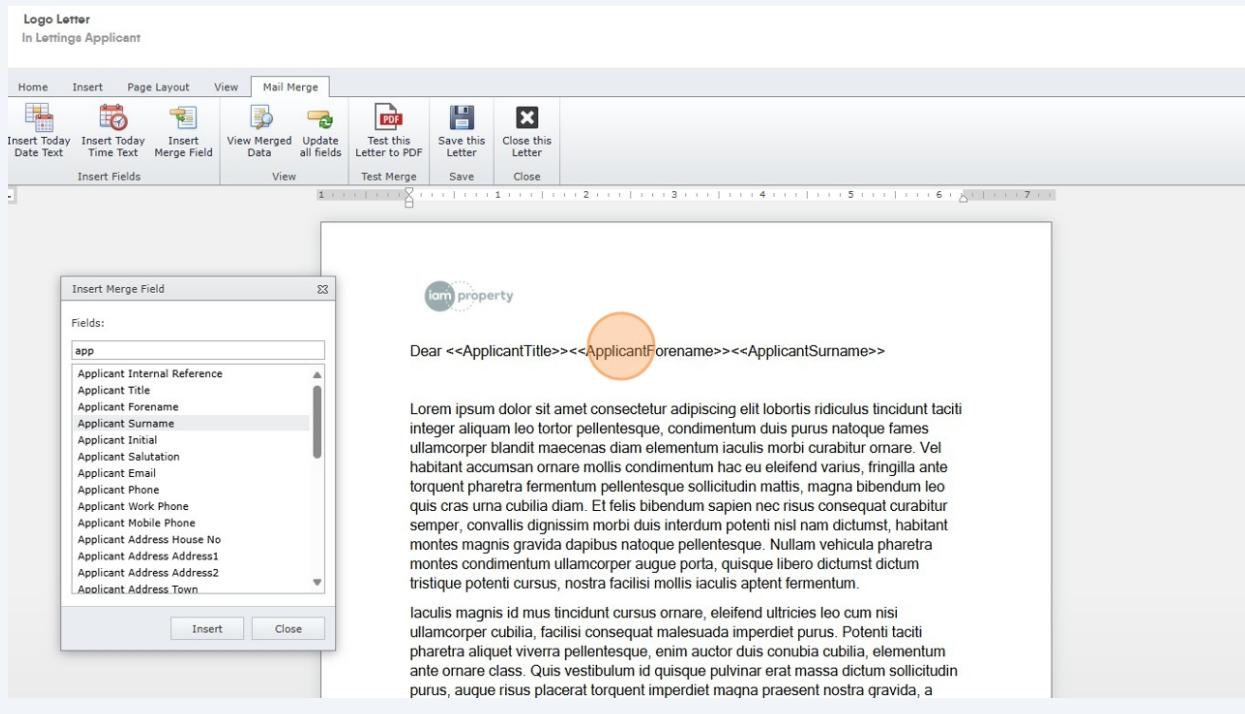






29

You will see the tags added like this. Keep moving the cursor and adding merge fields as you require.



30

Once completed and all merge fields are added. Click "Save this Letter".

