

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>

iam property

My day Lettings Sales Accounts Reporting Communications

My account

Welcome back, Training

+ Add New Record

View property management

Visit help centre

Search all records

Today's events

Time	Name
12:00	Test test

My tasks

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 iamproperty CRM dashboard. The top navigation bar includes the iamproperty logo, a menu with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', and a right-hand section with icons for a grid, calendar, notifications, search, and a 'My account' button highlighted with an orange circle. Below the navigation bar, the main content area displays 'Welcome back, Training' and a 'Add New Record' button. There are links for 'View property management' and 'Visit help centre'. A search bar is present. Below the search bar, there are two main sections: 'My events' and 'My tasks'. The 'My tasks' section contains a table with the following data:

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

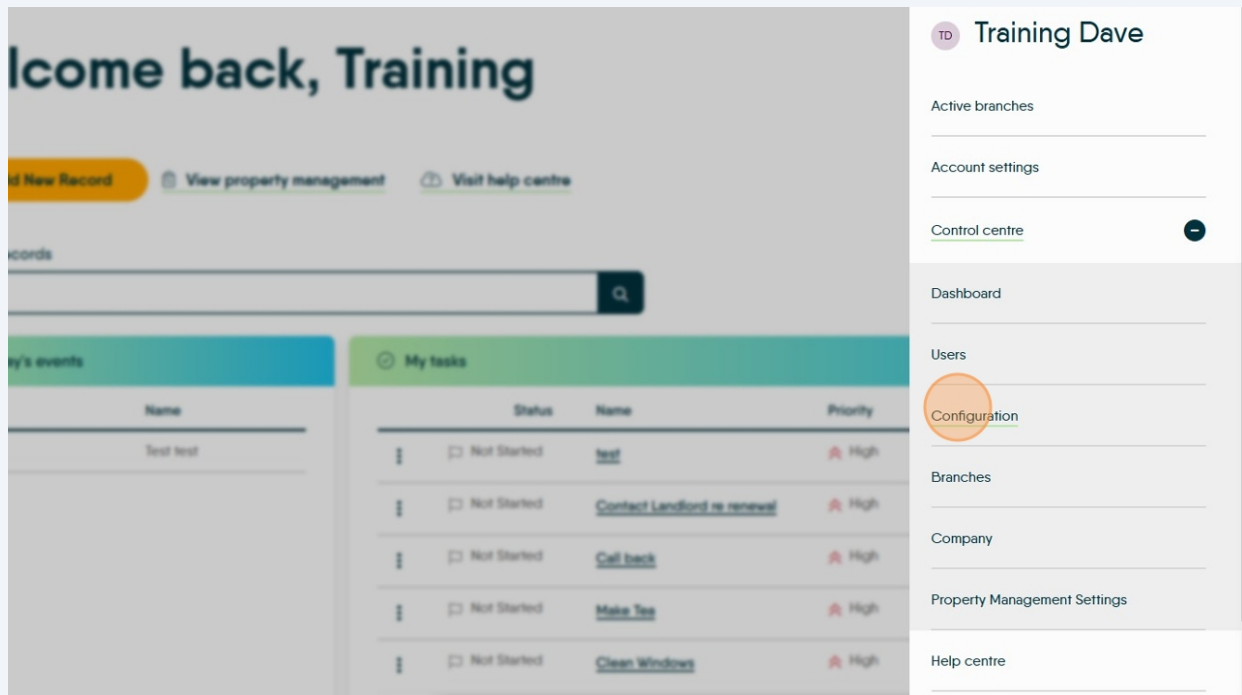
4 Click "Control centre"

The screenshot shows the iamproperty CRM dashboard with the 'My account' button highlighted in the top right navigation bar. The main content area displays 'Welcome back, Training' and a 'Add New Record' button. There are links for 'View property management' and 'Visit help centre'. A search bar is present. Below the search bar, there are two main sections: 'My events' and 'My tasks'. The 'My tasks' section contains a table with the following data:

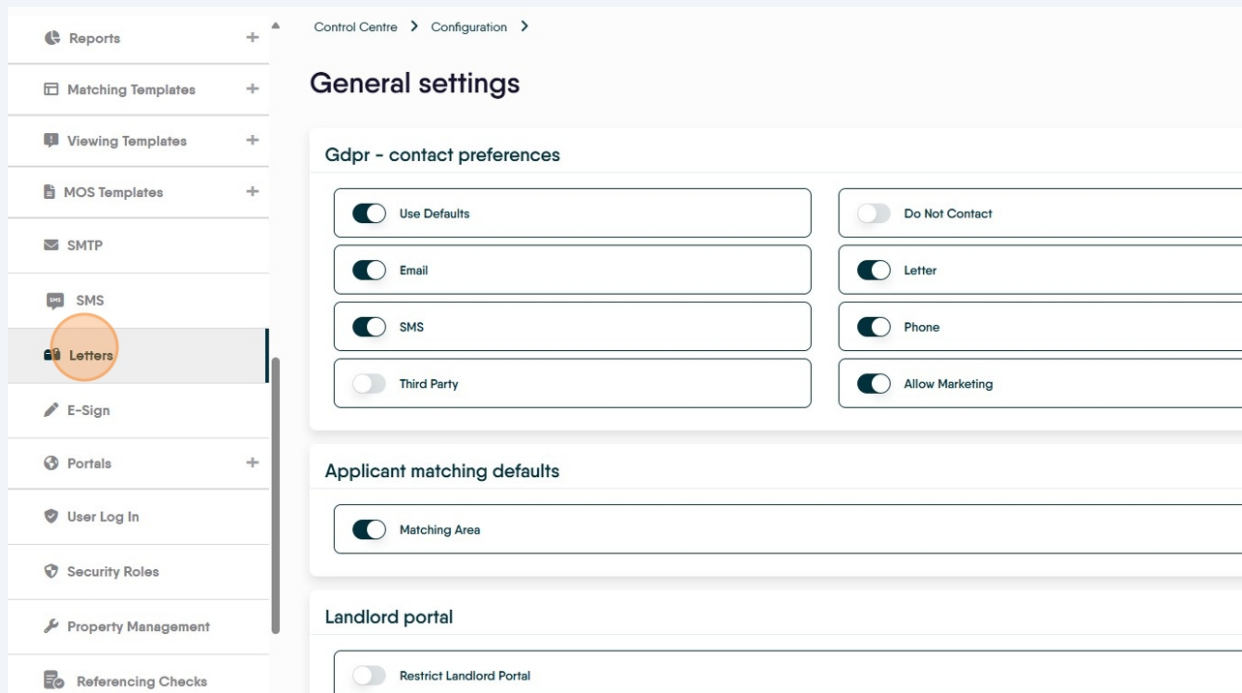
Status	Name	Priority
Not Started	test	High
Not Started	Contact Landlord re renewal	High
Not Started	Call back	High

The right-hand sidebar shows the user profile 'Training Dave' and a list of options: 'Active branches', 'Account settings', 'Control centre' (highlighted with an orange circle), 'Help centre', and 'Log out'.

5 Click "Configuration"

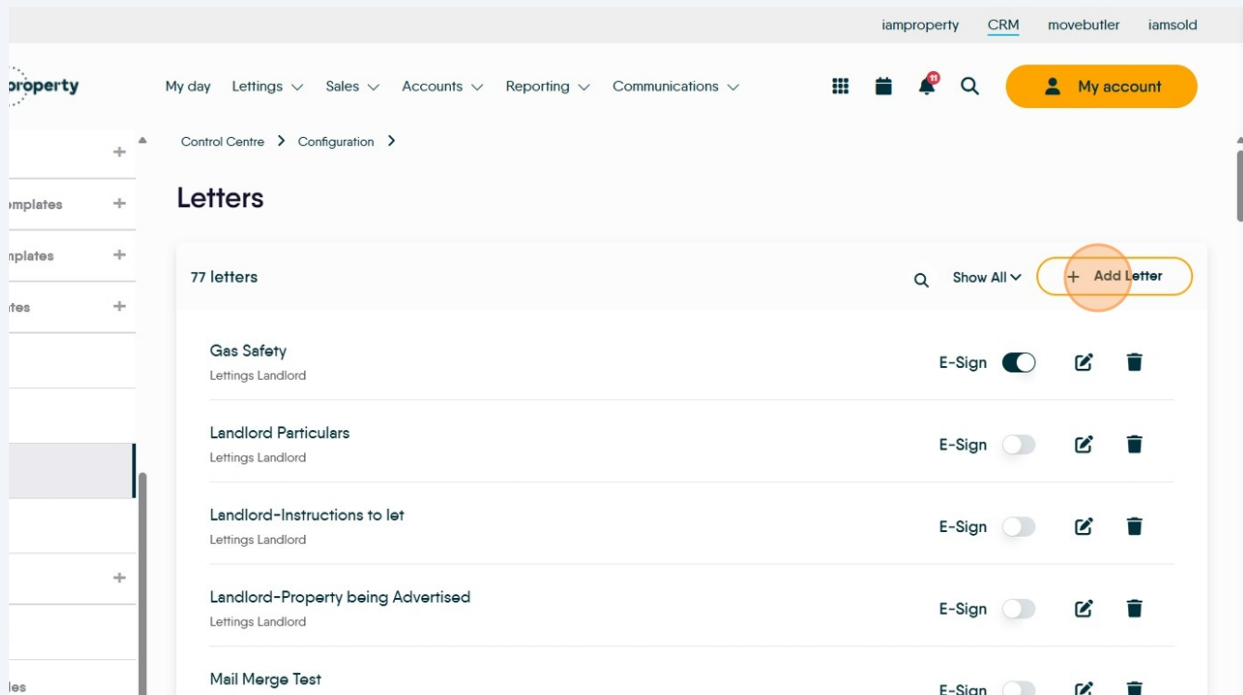


6 Scroll down and Click "Letters"



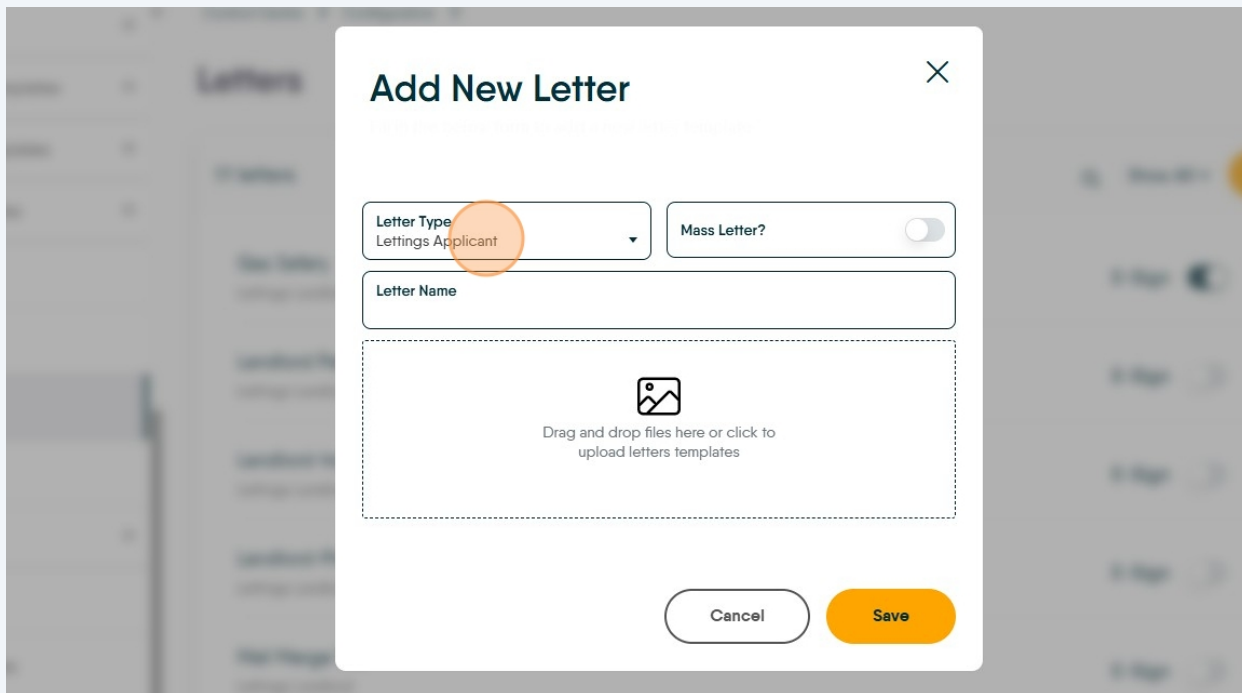
7

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



8

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





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.

Add New Letter

Letter Type
Lettings Applicant

Mass Letter? ☐

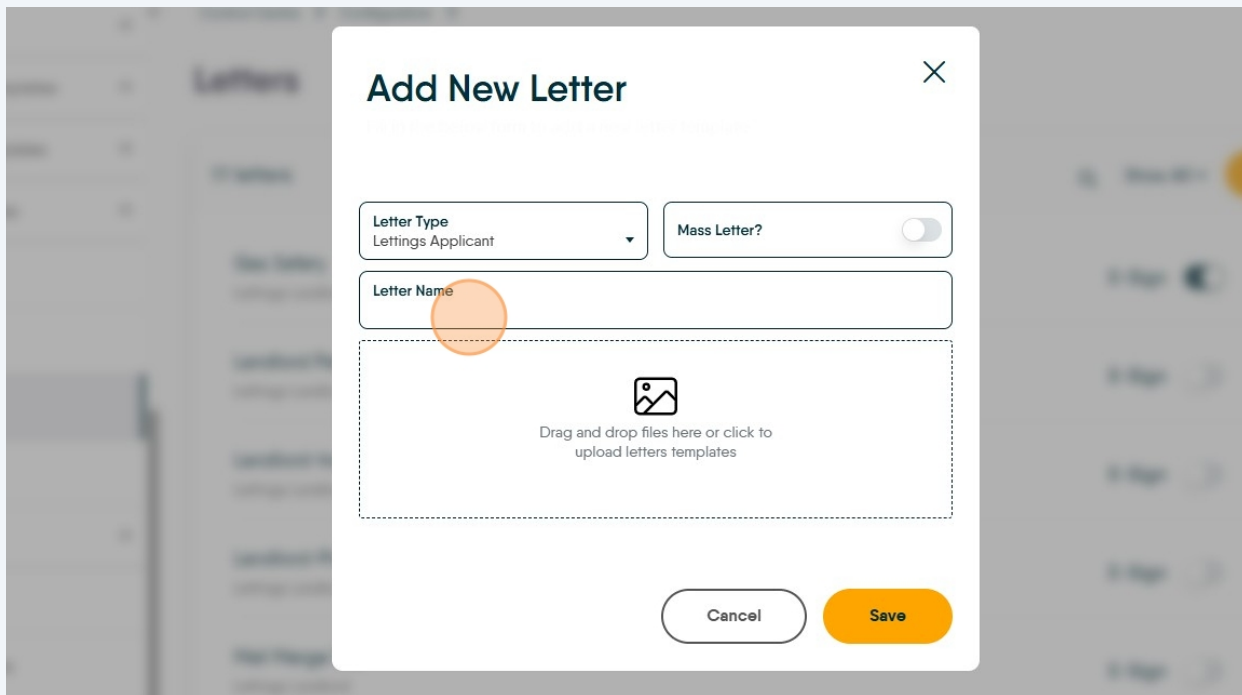
Lettings Applicant
Lettings Contractor
Lettings Landlord
Lettings Property
Lettings Tenancy
Lettings Tenant

Upload files here or click to select templates

Cancel Save

10

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

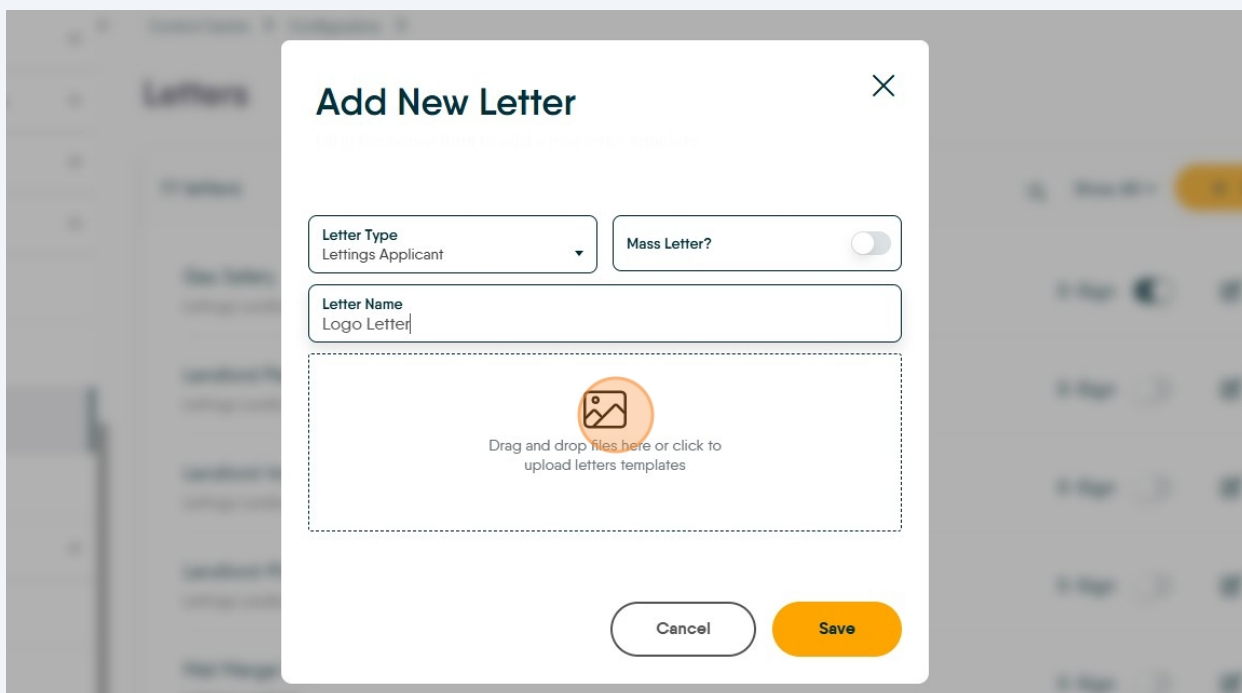


The screenshot shows a modal window titled "Add New Letter" with a close button (X) in the top right corner. Below the title is a subtitle: "This is the name that will be used to identify this letter in the CRM." The form contains the following elements:

- Letter Type:** A dropdown menu currently showing "Lettings Applicant".
- Mass Letter?:** A toggle switch that is currently turned off.
- Letter Name:** A text input field, which is highlighted with an orange circle.
- Image Upload Area:** A dashed rectangular box containing an image icon and the text: "Drag and drop files here or click to upload letters templates".
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

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.



This screenshot shows the same "Add New Letter" modal form, but with the text "files here" in the upload instruction highlighted by an orange circle. The "Letter Name" field now contains the text "Logo Letter".

- Letter Type:** A dropdown menu currently showing "Lettings Applicant".
- Mass Letter?:** A toggle switch that is currently turned off.
- Letter Name:** A text input field containing "Logo Letter".
- Image Upload Area:** A dashed rectangular box containing an image icon and the text: "Drag and drop **files here** or click to upload letters templates".
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

- 12 Once your document is added click "Save"

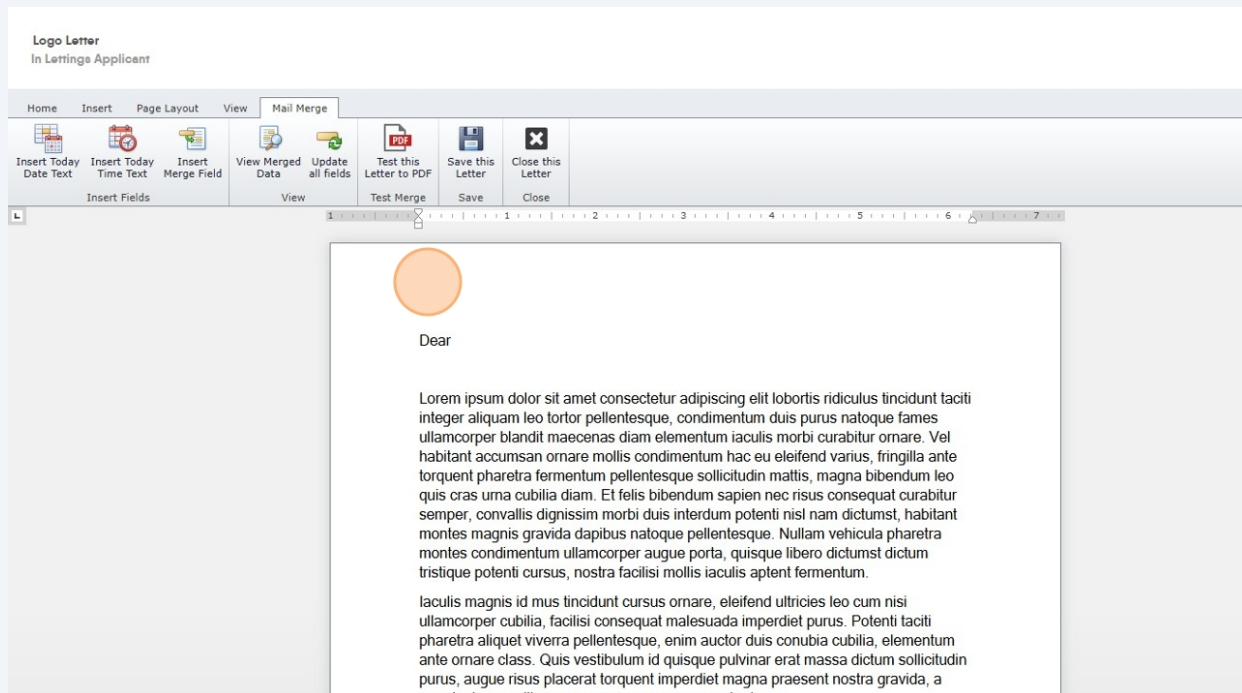
The screenshot shows a modal window titled "Add New Letter" with a close button (X) in the top right corner. Below the title is a faint instruction: "Select the letter type and add a document to produce the letter." The form contains the following elements: a "Letter Type" dropdown menu set to "Lettings Applicant"; a "Mass Letter?" toggle switch currently turned off; a "Letter Name" text field containing "Logo Letter"; a file upload area showing a file named "logo test.rtf" with a size of "51.6 KB" and a "Remove file" link; and two buttons at the bottom: "Cancel" and "Save". The "Save" button is highlighted with an orange circle.

Adding the Logo/Editing the Letter

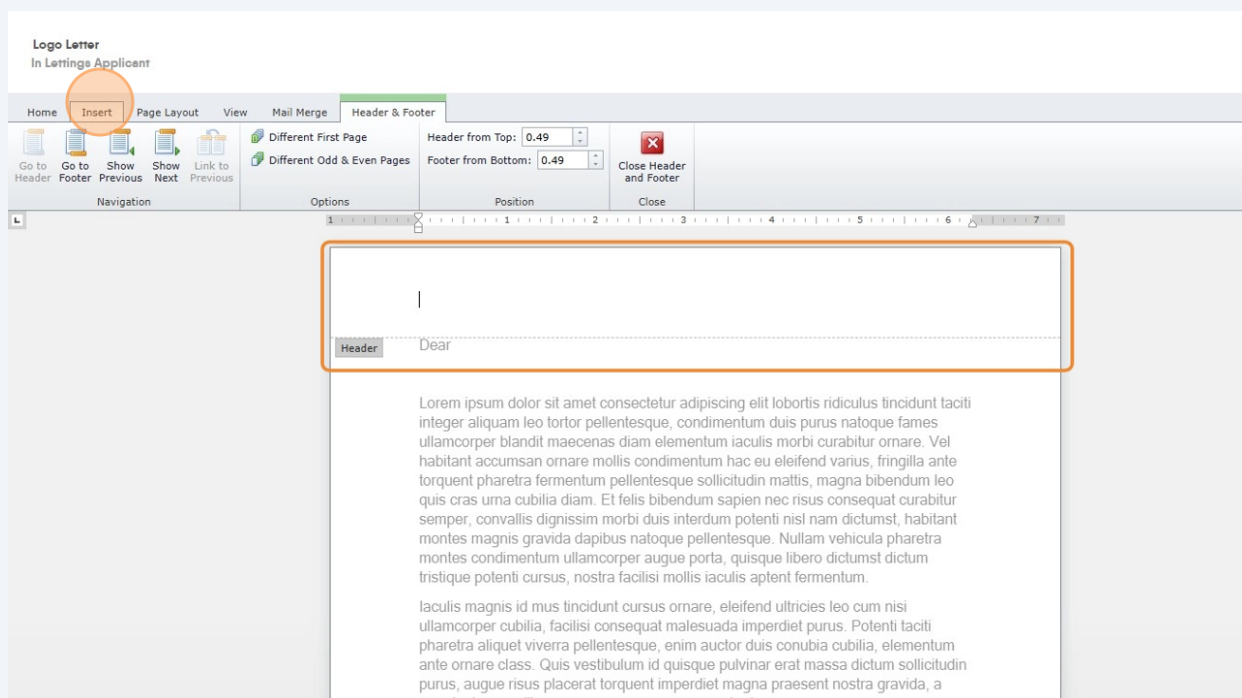
- 13 In the letters menu of CRM scroll to find the letter you have just added, it will most likely be at the end of the list. Click here to open the editor.

The screenshot displays the CRM interface with a sidebar on the left containing menu items like "Templates", "Notes", "Files", "Management", and "My Checks". The main content area is titled "Sales Offer" and lists several letter templates. The list includes: "Sales Offer Rejection" (Sales Offer), "Standard Memorandum of Sale" (Sales Offer), "Standard Offer Accepted - Letter to Purchasor" (Sales Offer), "Standard Offer Accepted - Letter to Vendor Solicitor" (Sales Offer), "Standard Offer Accepted - Letter to Vendor" (Sales Offer), and "Confirmation of Sale" (Sales Vendor). At the bottom of the list, a search bar contains "Logo Letter" and "Lettings Applicant". To the right of the list, there are "E-Sign" toggle switches and edit/delete icons for each letter. The edit icon for the "Logo Letter" entry is highlighted with an orange circle, and a tooltip above it reads "Edit and produce the letter."

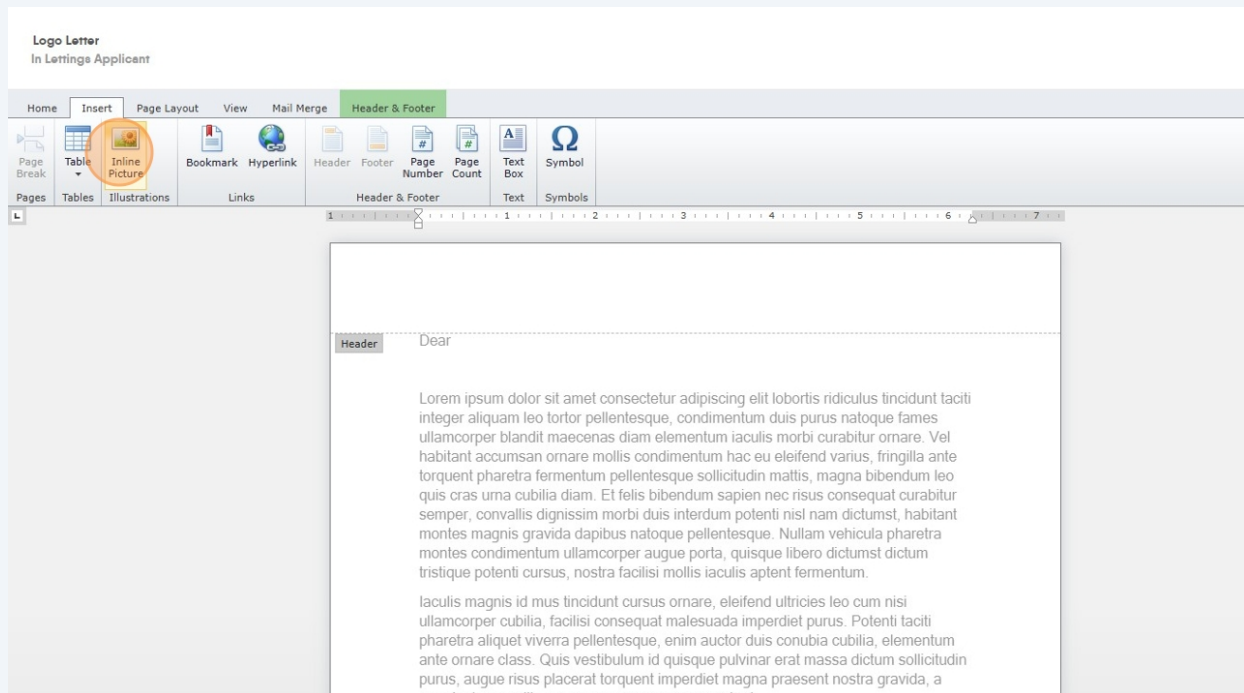
14 Double-click at the top of the screen to open the 'Header' of your document.



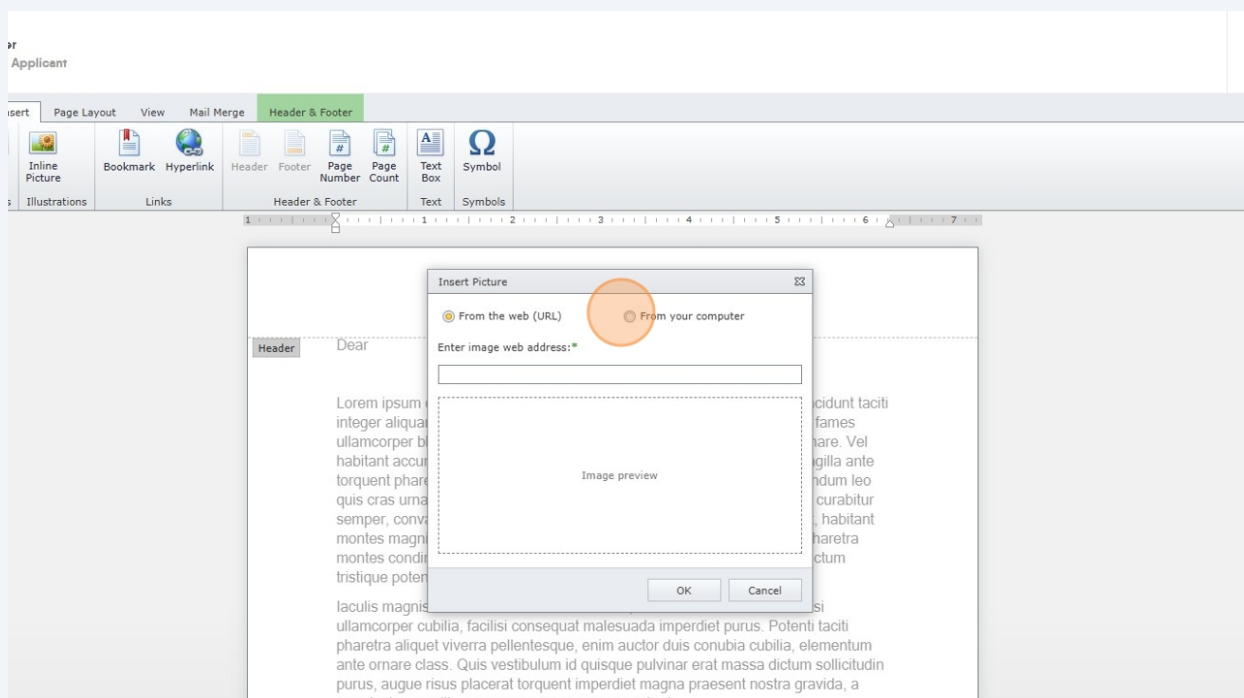
15 Click "Insert"



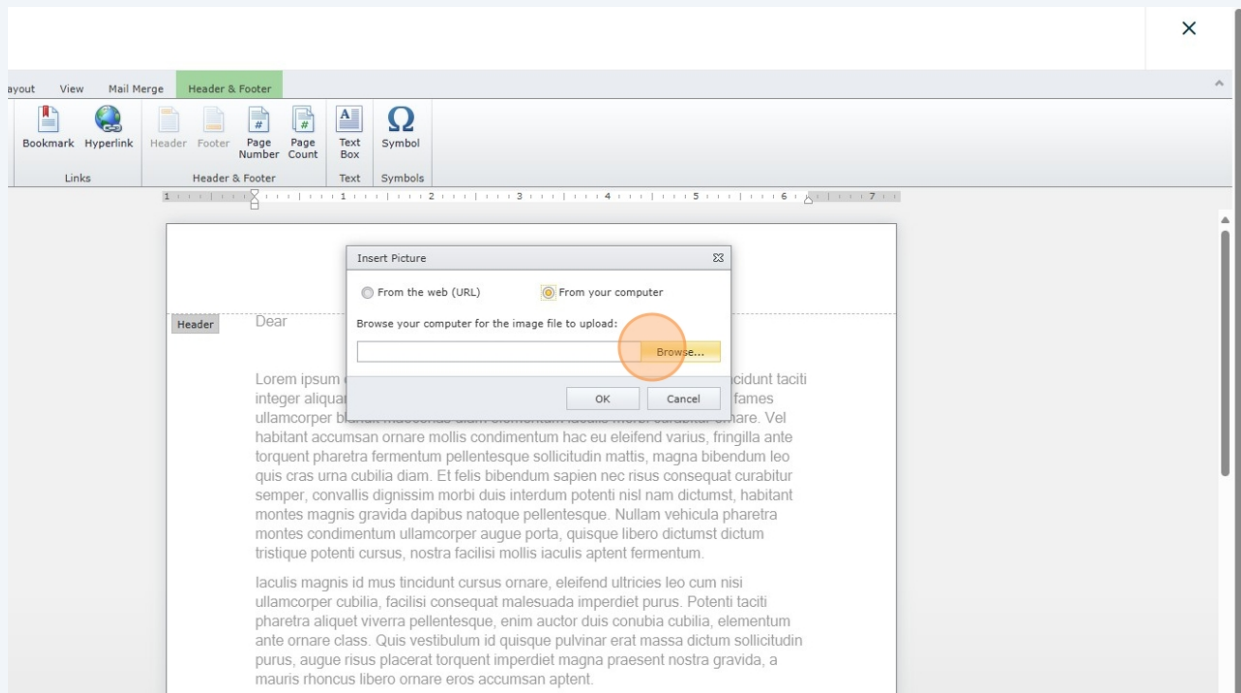
16 Click "Inline Picture"



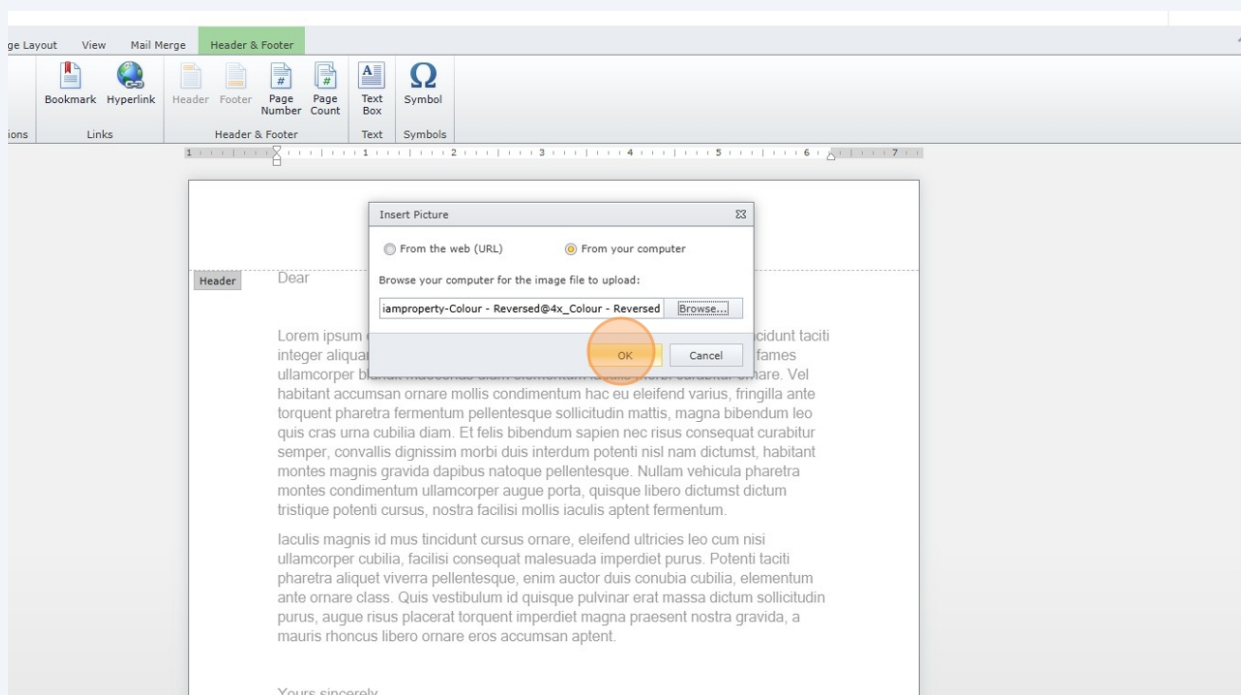
17 In the 'Insert Picture' section you can link to an image on the internet or (most likely) find an image on your computer and link to that.



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

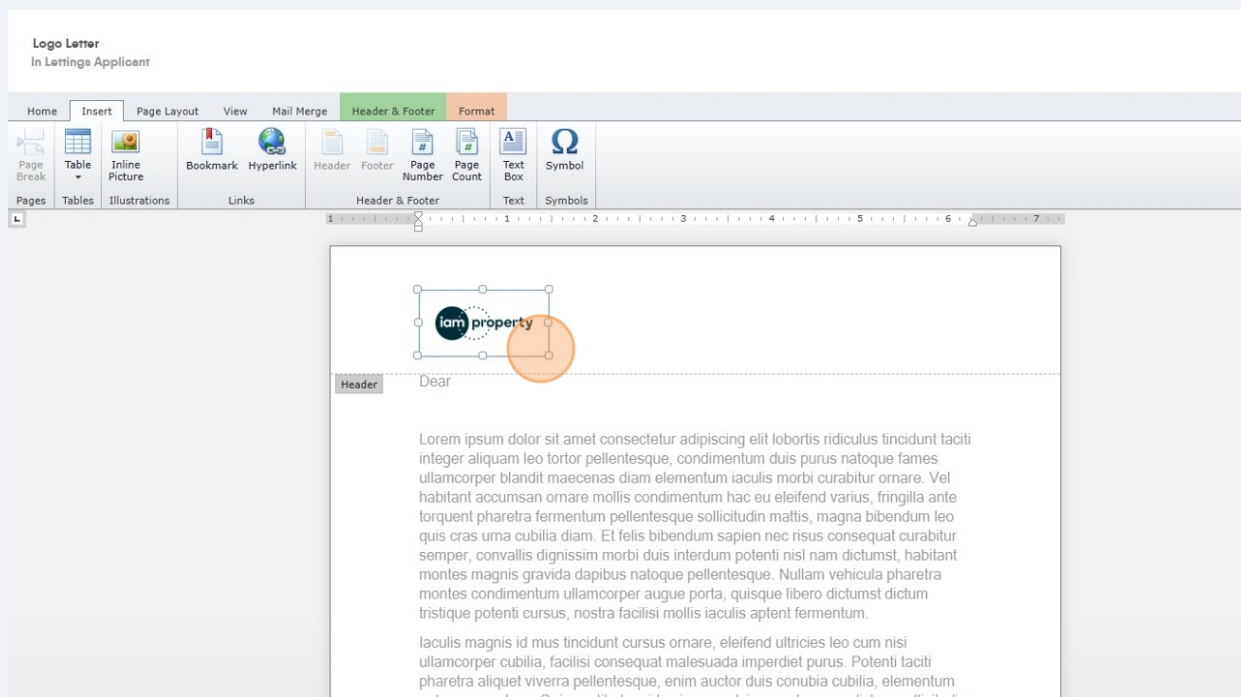


19 Once the image is found. Click "OK"

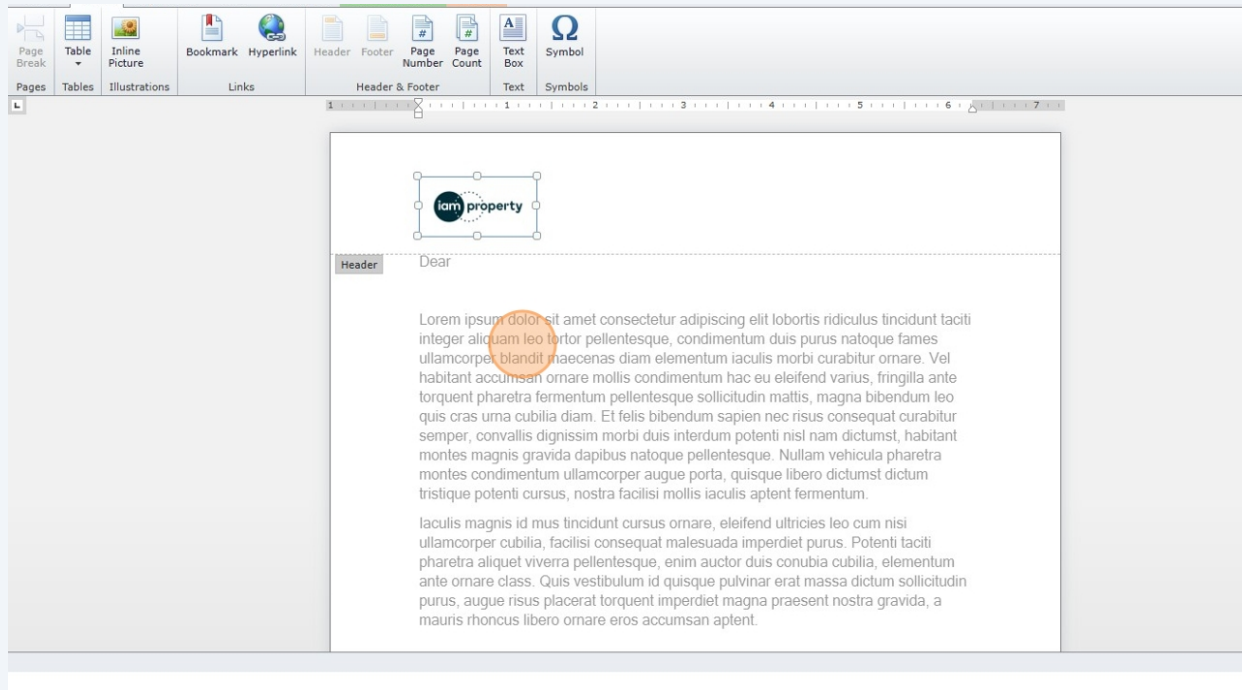


20

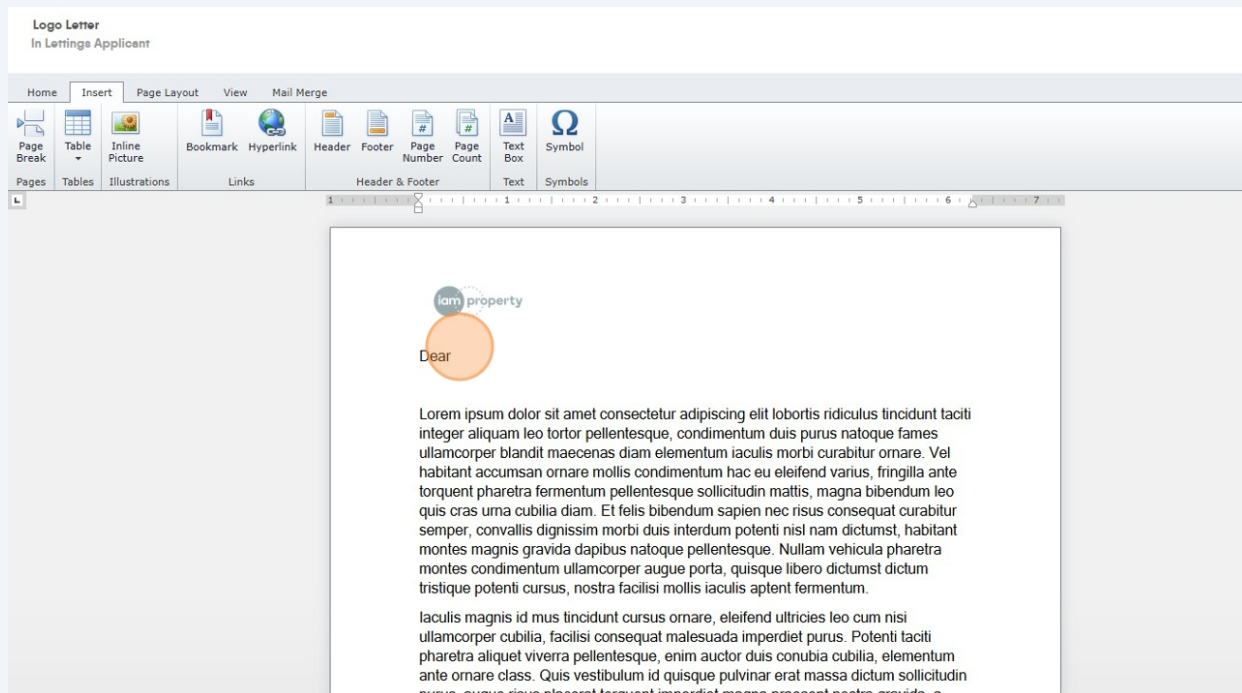
Your image will load, click onto it and use the options to re-size the image to fit your document. Click here.



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.



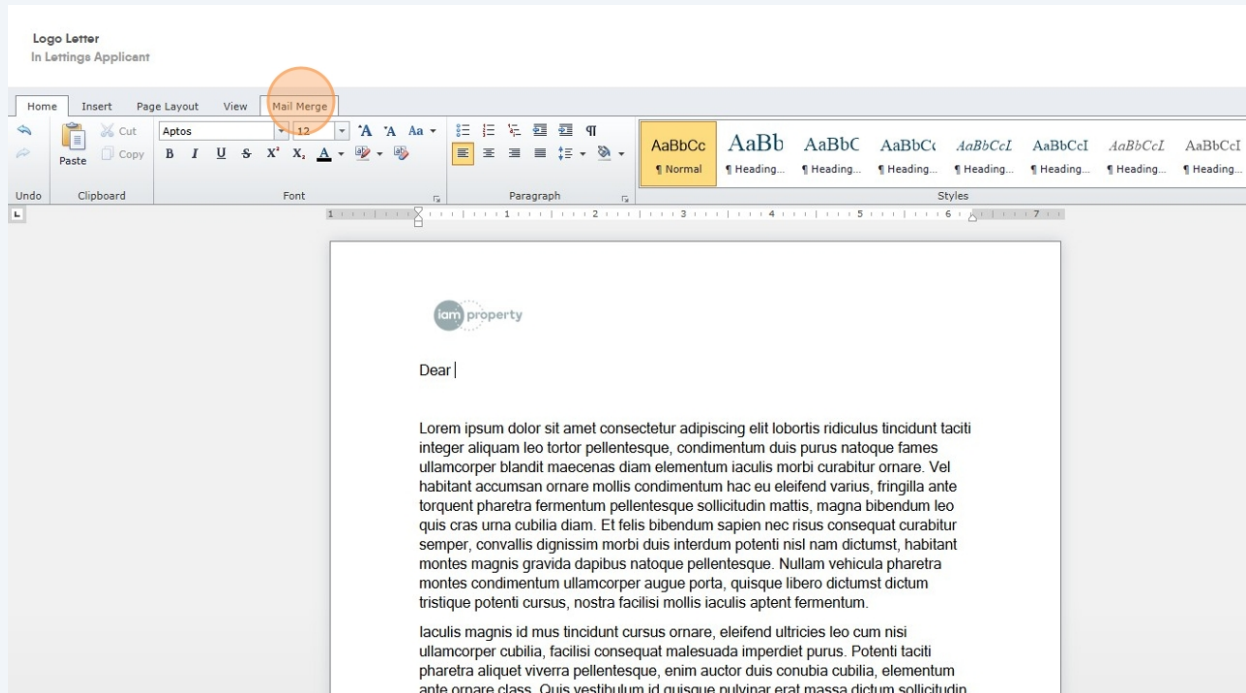
Updating Merge Tags

23

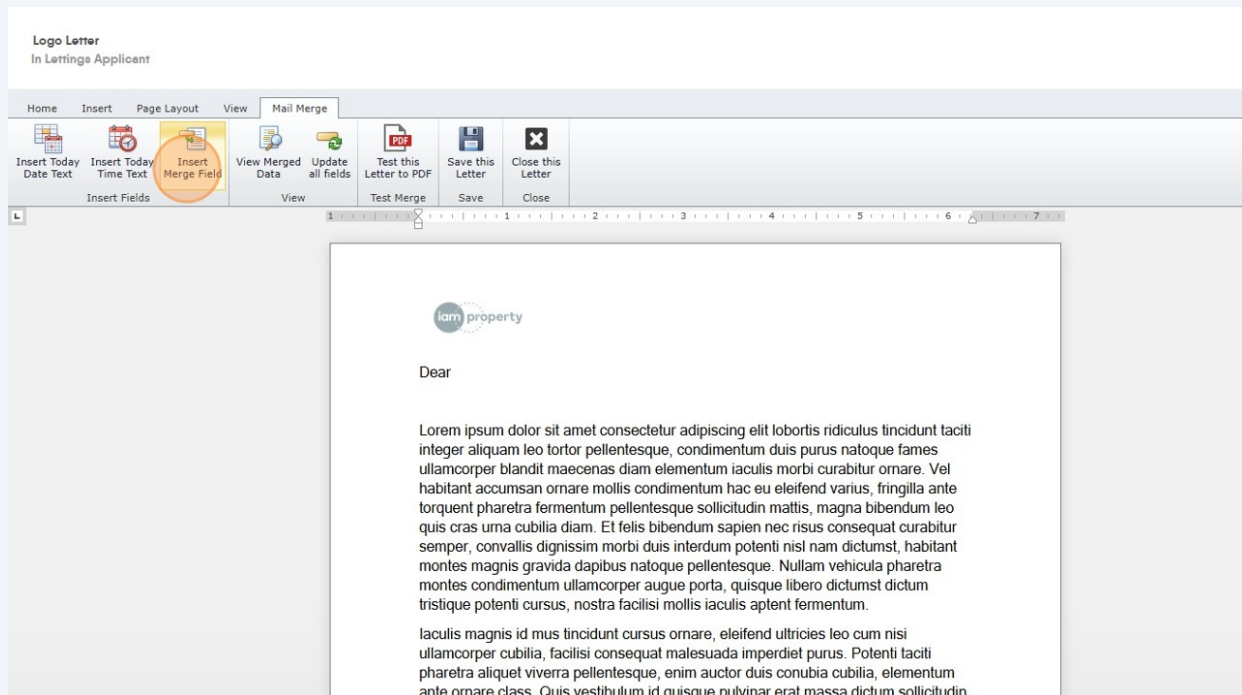
Merge Tags allow data - names, addresses, property details etc. - to be added automatically to a letter to produce a personalised document.

24

Click "Mail Merge"



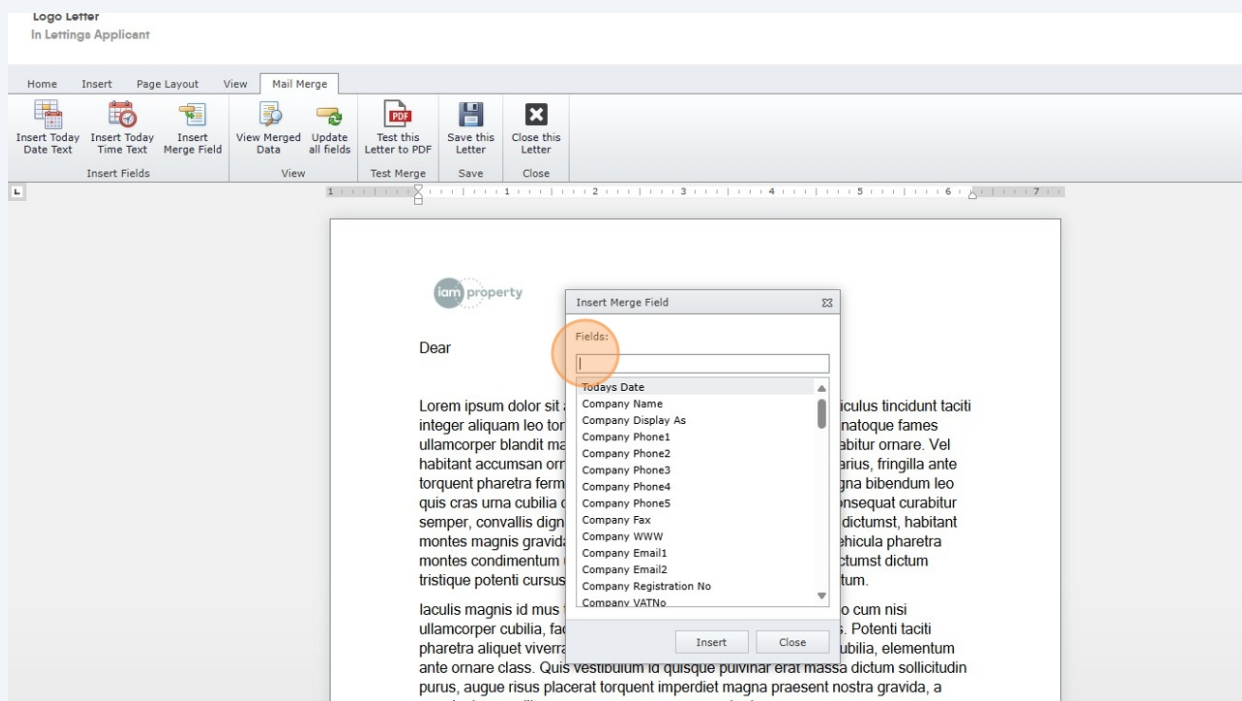
25 Click "Insert Merge Field"



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,

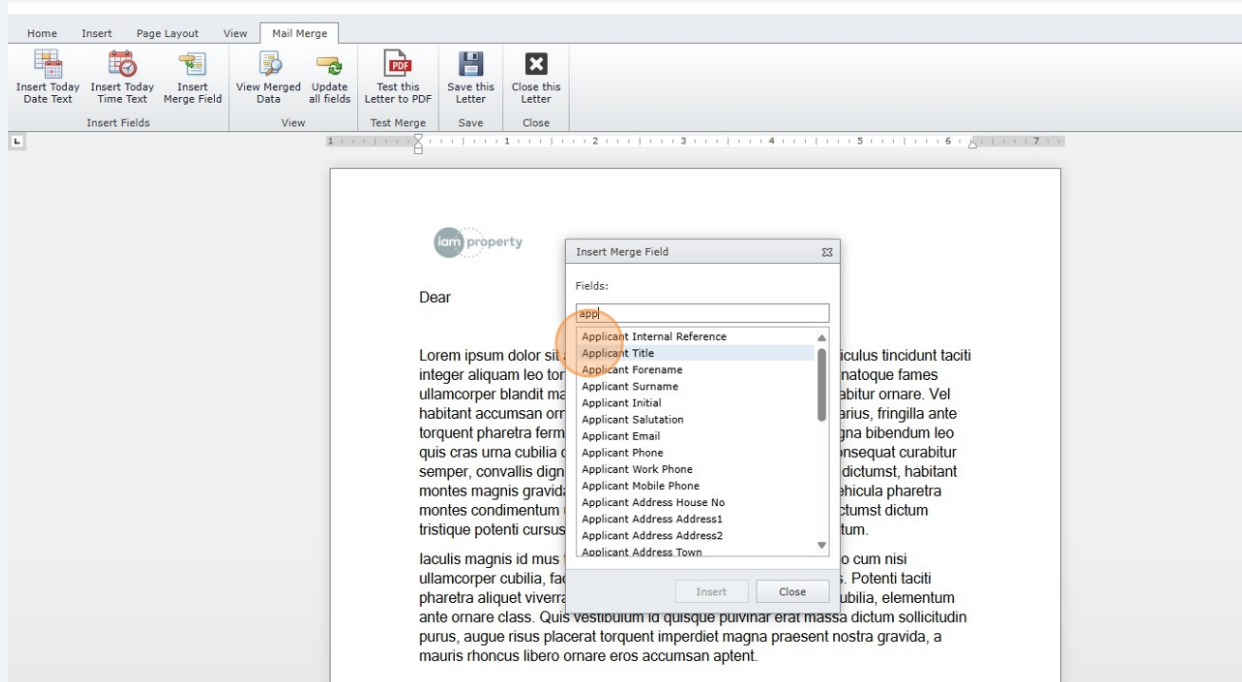
26

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.

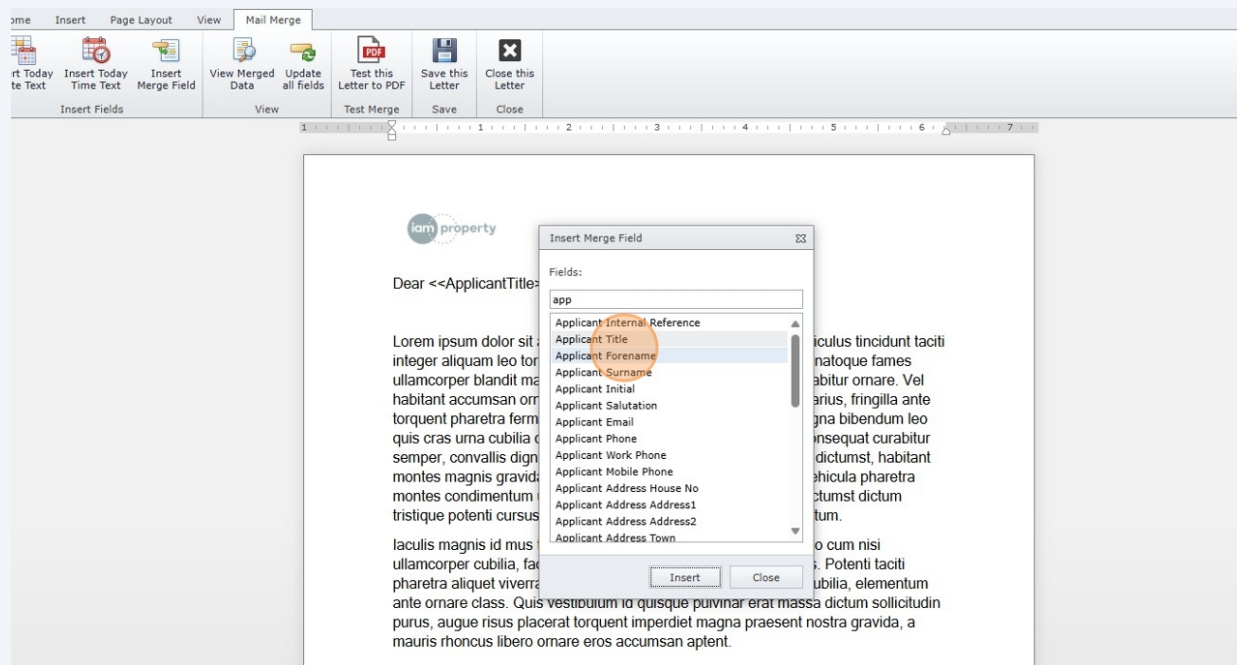
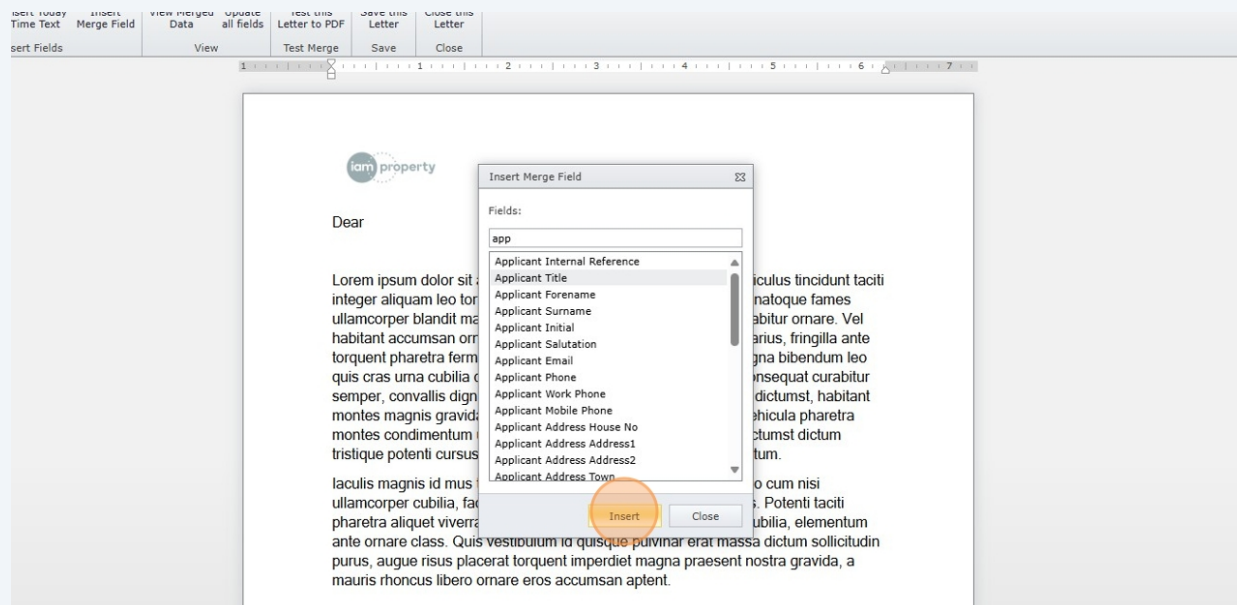
Click "Applicant Forename"

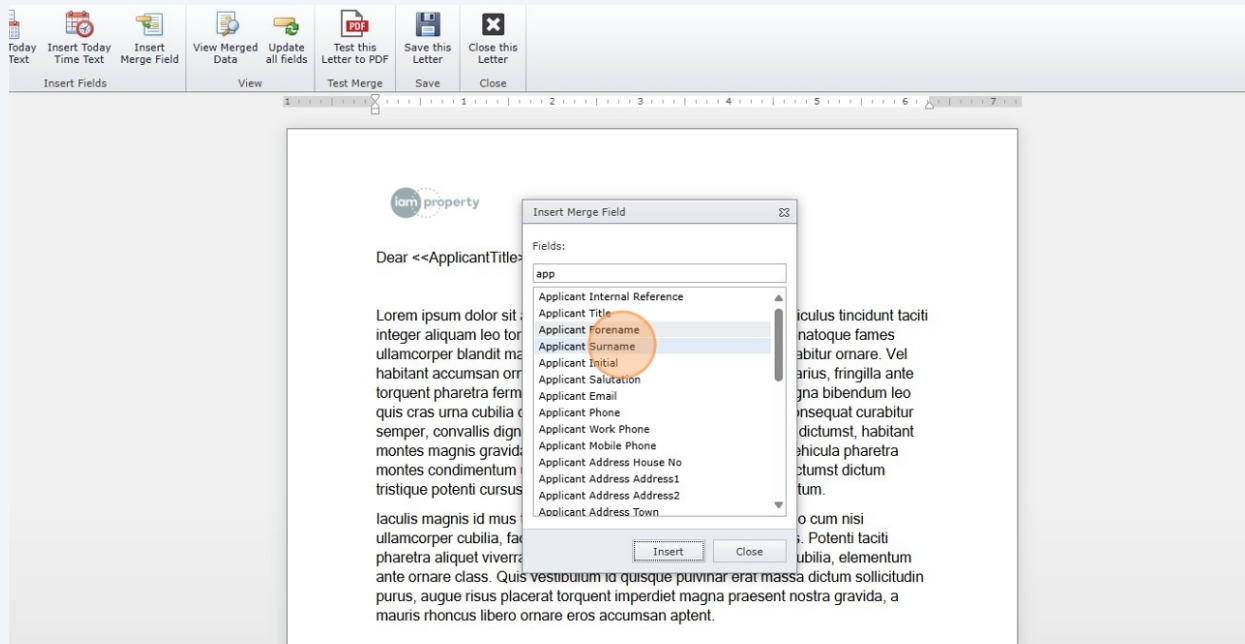
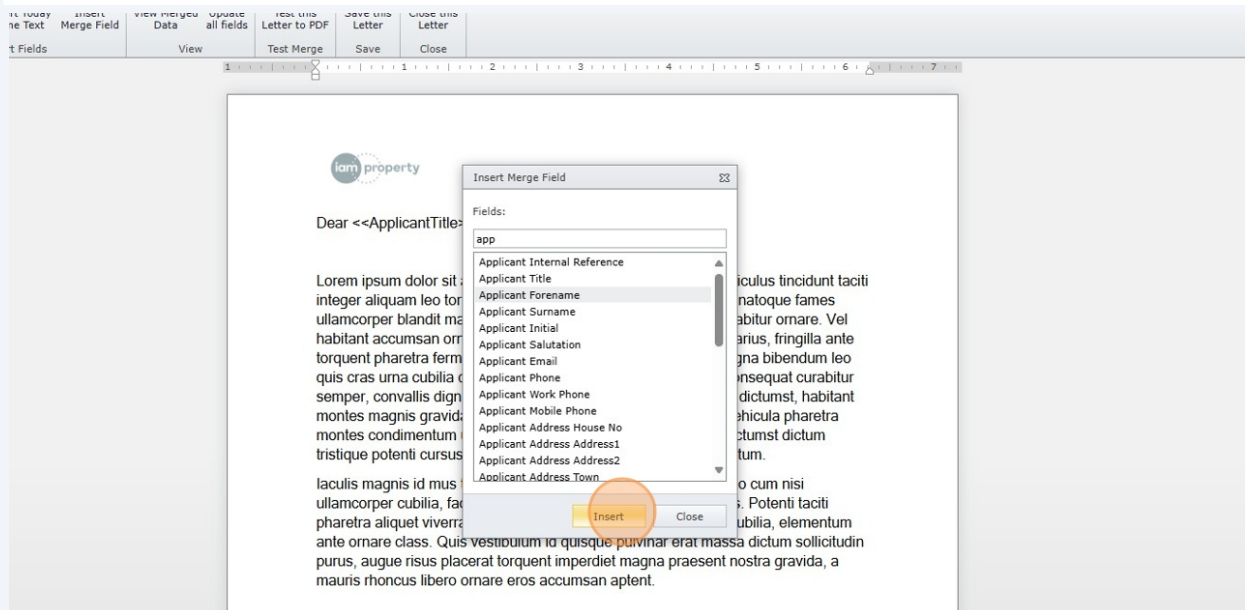
Click "Insert"

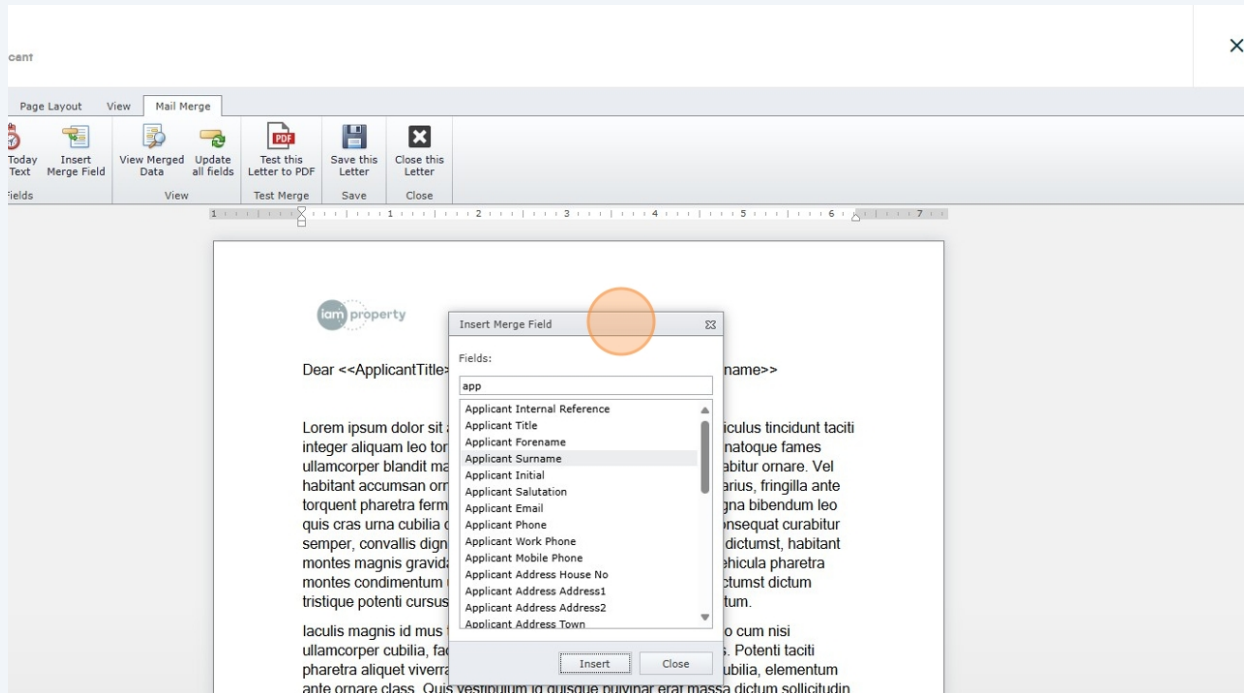
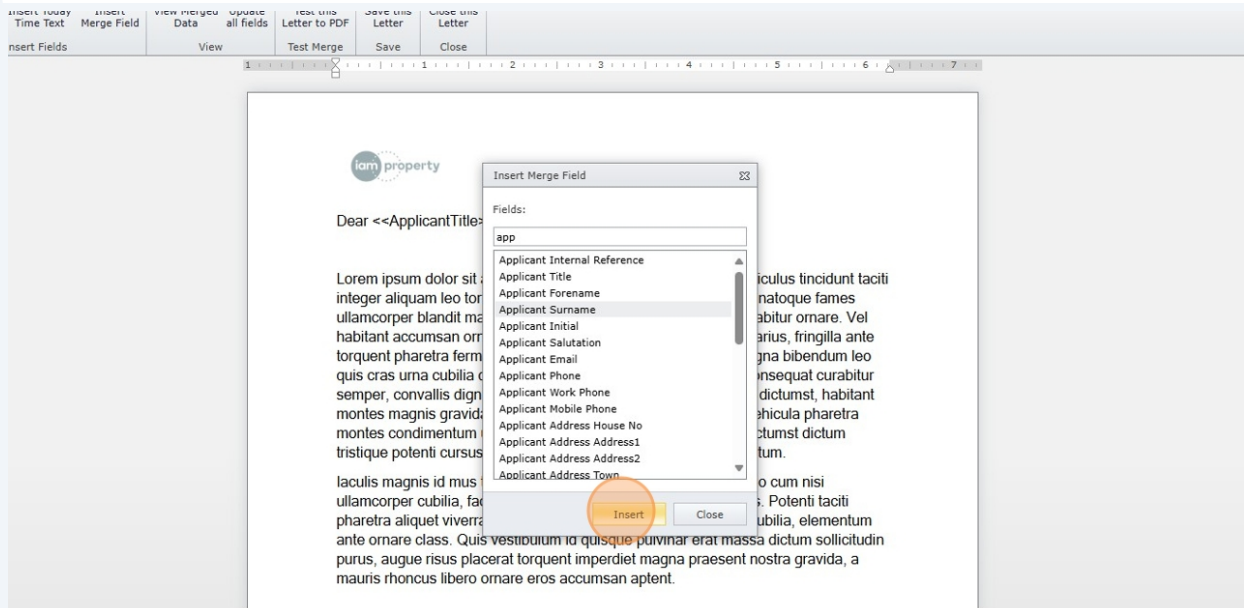
Click "Applicant Surname"

Click "Insert"

Click "Insert Merge Field"

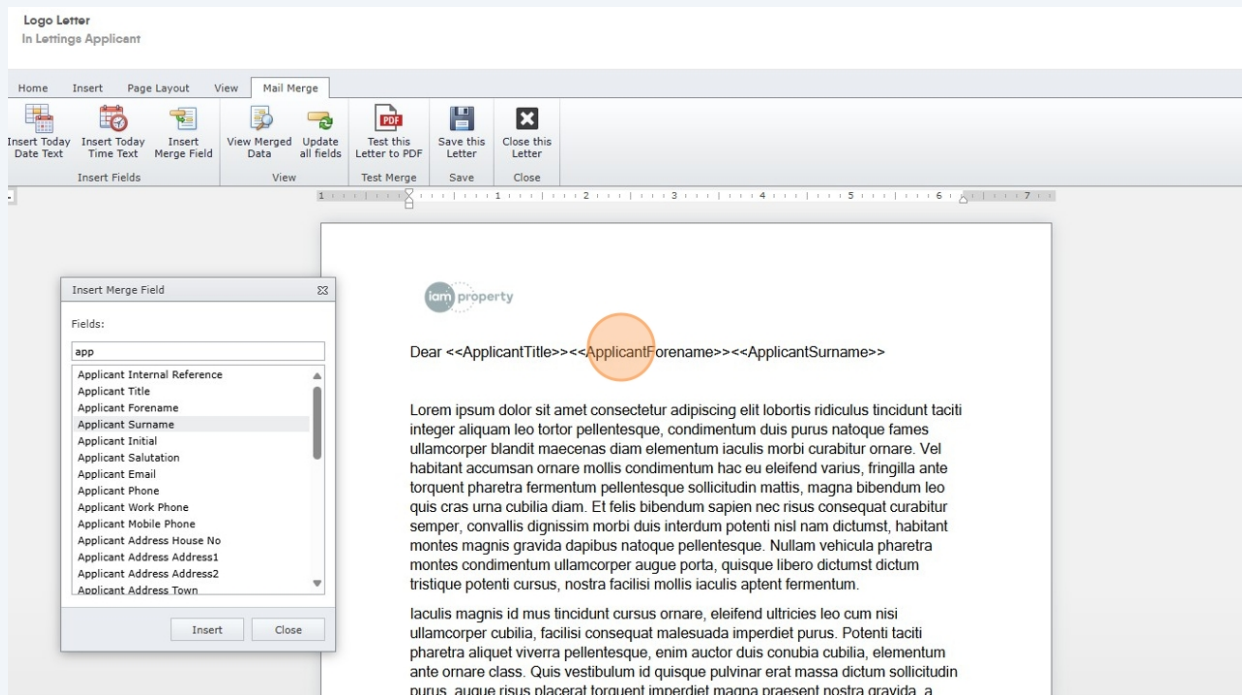






29

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".

