

# Creating an Email Template in CRM



This guide provides a step-by-step approach to creating an email template in the CRM, making it easy to personalise communications with clients.

By following the instructions, users can efficiently craft templates that enhance their outreach efforts, saving time and ensuring consistency in messaging.

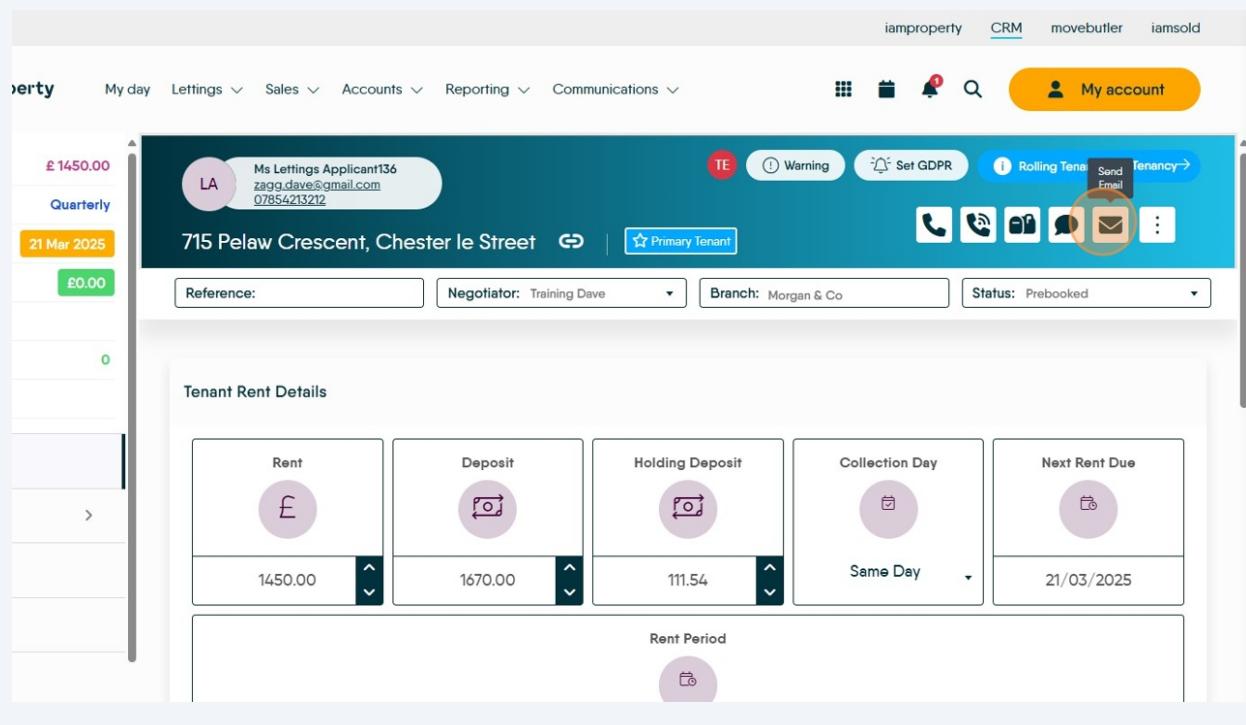
- 1 Navigate to <https://crm.iamproperty.com/Lettings/Tenant/Record/70854545>

The screenshot shows the iam property CRM interface. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. The main content area displays a tenant record for 'Ms Lettings Applicant136' with the email 'zagg.dave@gmail.com' and phone '07854213212'. The address is '715 Pelaw Crescent, Chester le Street'. The record is marked as a 'Primary Tenant'. Below this, there are sections for 'Tenant Rent Details' and 'Rent Period'. The 'Tenant Rent Details' section shows the following data:

Category	Value
Rent	£1450.00
Deposit	£1670.00
Holding Deposit	£111.54
Collection Day	Same Day
Next Rent Due	21/03/2025

The 'Rent Period' is set to 'Quarterly'. On the left, a sidebar navigation includes 'Details', 'Accounts', 'Checklist', 'Financial', 'Contacts', and 'Documents'.

2 Click here.



£ 1450.00  
Quarterly  
21 Mar 2025  
£0.00

Ms Lettings Applicant136  
zarg9.dave@gmail.com  
07854213212

715 Pelaw Crescent, Chester le Street | Primary Tenant

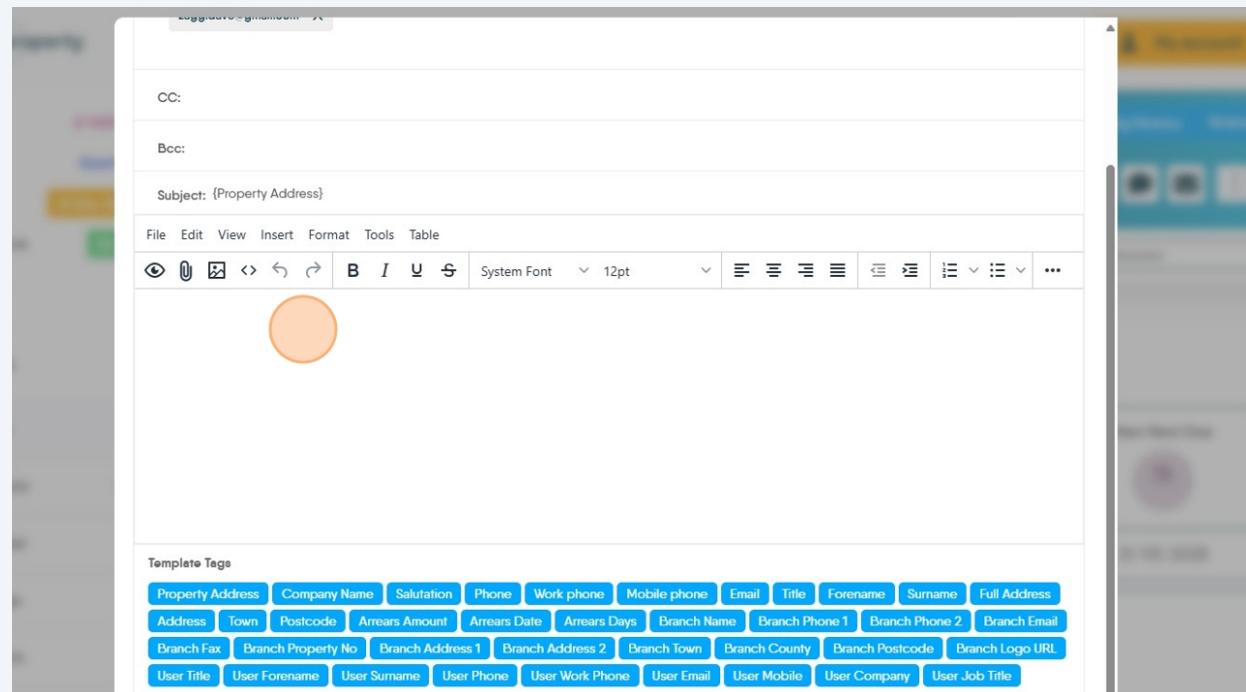
Reference: Negotiator: Training Dave Branch: Morgan & Co Status: Prebooked

Tenant Rent Details

Rent	Deposit	Holding Deposit	Collection Day	Next Rent Due
£ 1450.00	1670.00	111.54	Same Day	21/03/2025

Rent Period

3 Click here and type the body text of your email.



CC:  
Bcc:  
Subject: {Property Address}

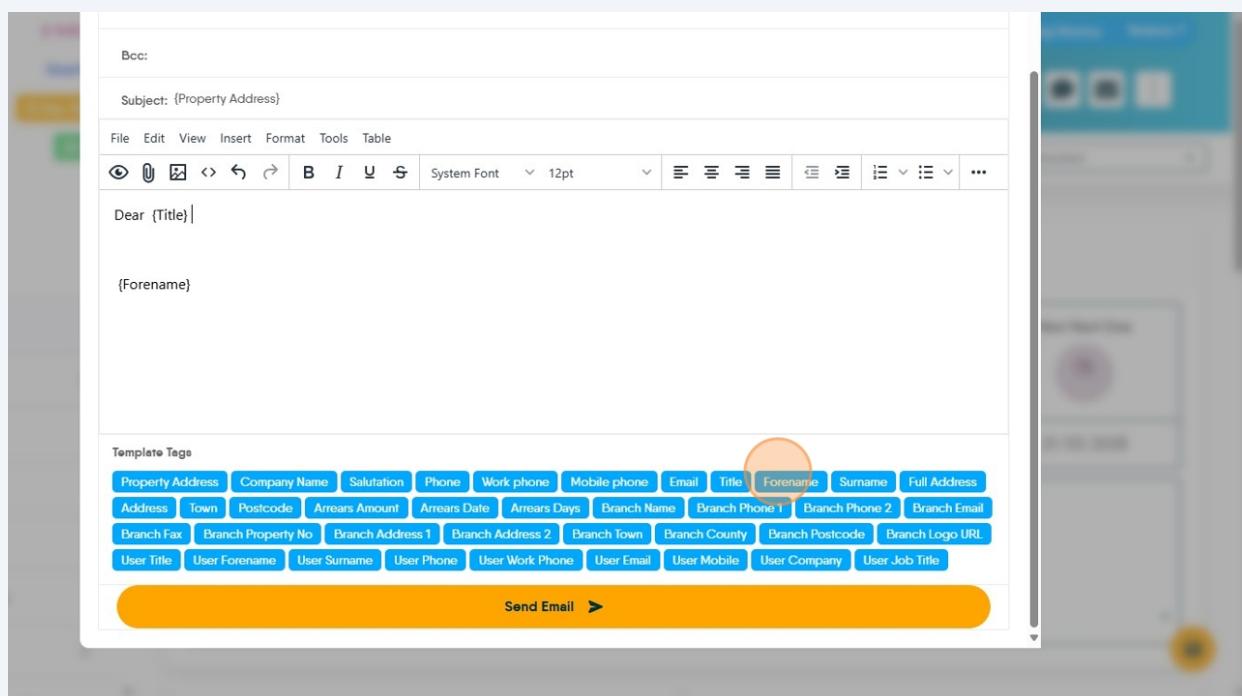
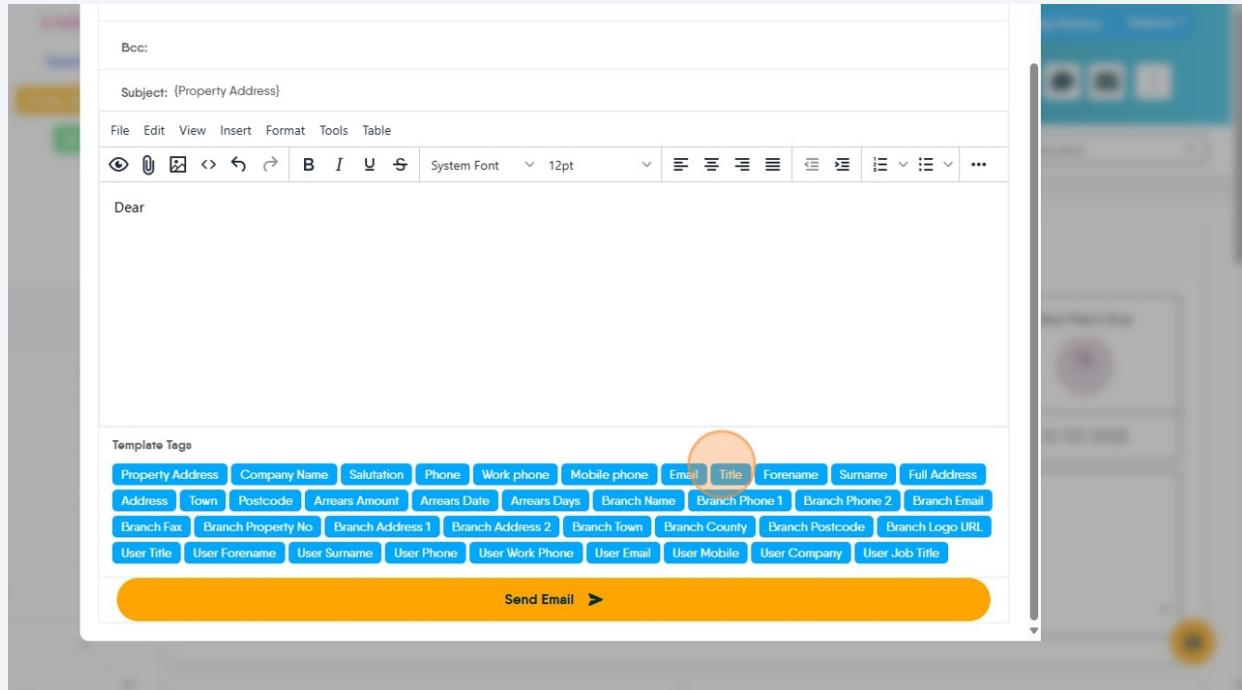
File Edit View Insert Format Tools Table

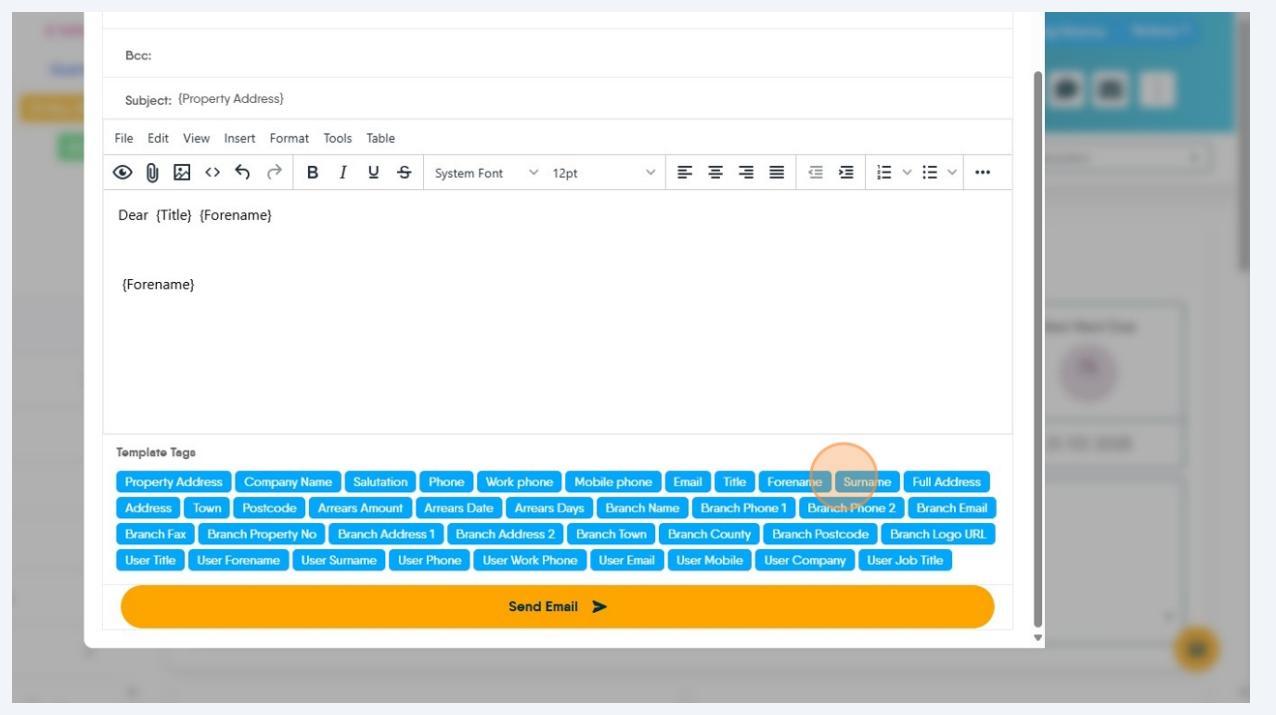
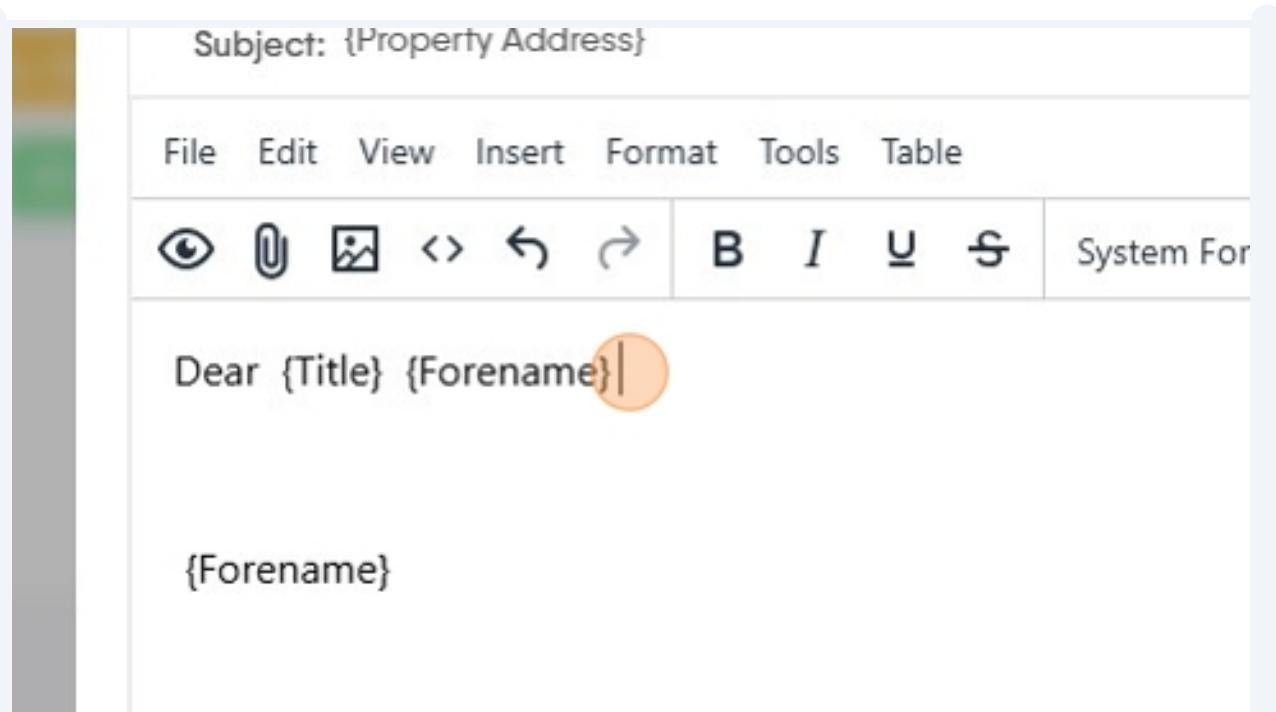
Template Tags

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		

4

To add the 'Template Tags' place the cursor where the tag is to go. Click the blue options at the bottom of the screen.  
Click "Forename"  
Click here.  
Click "Surname"





5 Click here.

CC:

Bcc:

Subject: {Property Address}

File Edit View Insert Format Tools Table

**Dear {Title} {Forename} {Surname}**

Please find attached a request to access the property at {Full Address} to allow us ({Branch Name}) to conduct a full property inspection.

Please contact the office {Branch Phone 1} or myself {User Email} if there are any issues.

Regards

{User Forename} {User Surname}  
{Branch Name} {Branch Town}

Template Tags

Property Address Company Name Salutation Phone Work phone Mobile phone Email Title Forename Surname Full Address

6 Click here.

CC:

Bcc:

Subject: {Property Address}

File Edit View Insert Format Tools Table

**Dear {Title} {Forename} {Surname}**

Please find attached a request to access the property at {Full Address} to allow us ({Branch Name}) to conduct a full property inspection.

Please contact the office {Branch Phone 1} or myself {User Email} if there are any issues.

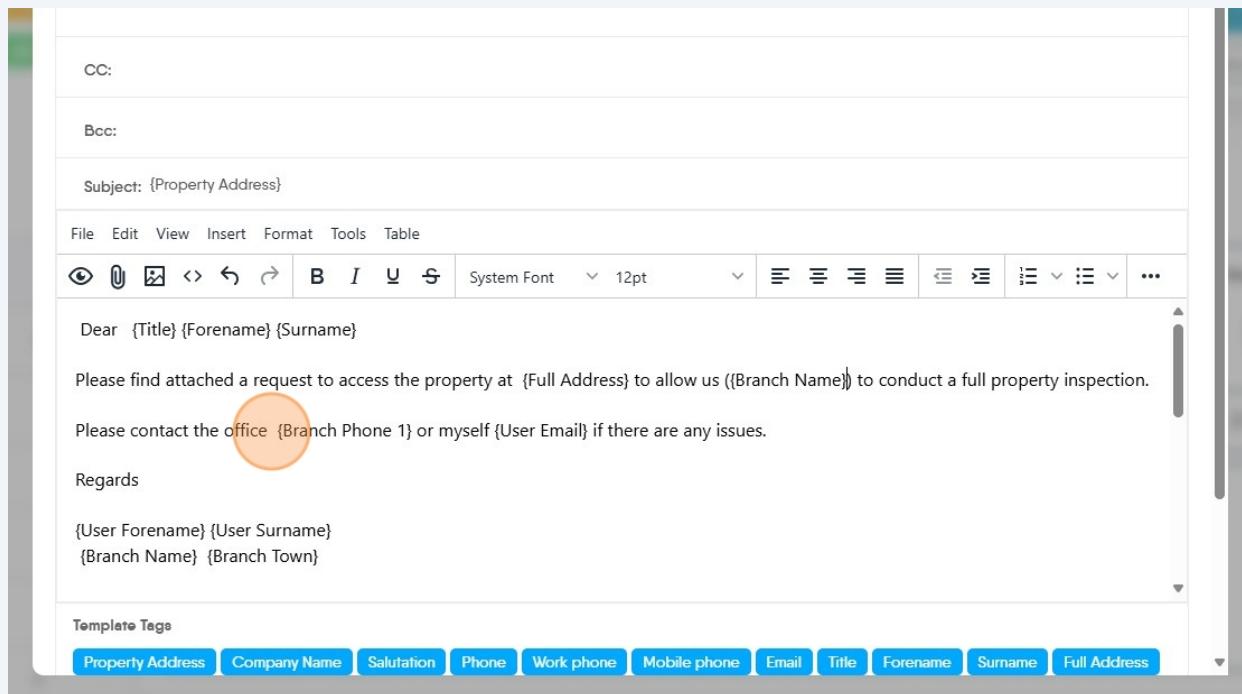
Regards

{User Forename} {User Surname}  
{Branch Name} {Branch Town}

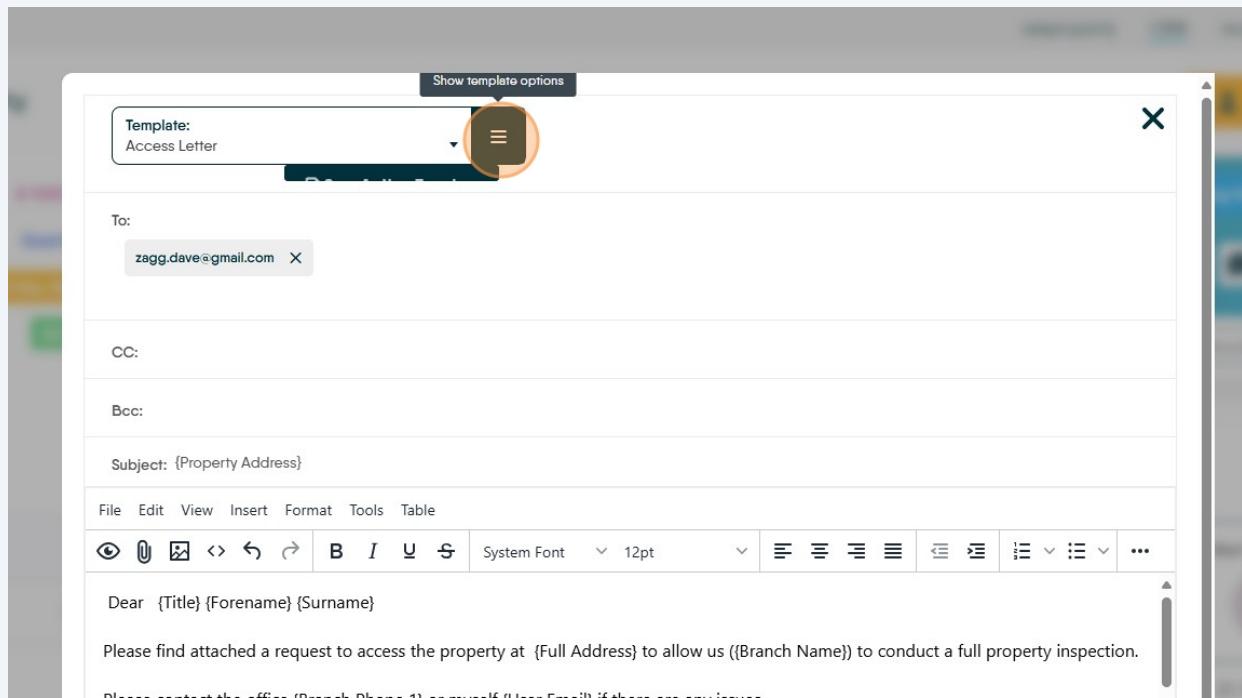
Template Tags

Property Address Company Name Salutation Phone Work phone Mobile phone Email Title Forename Surname Full Address

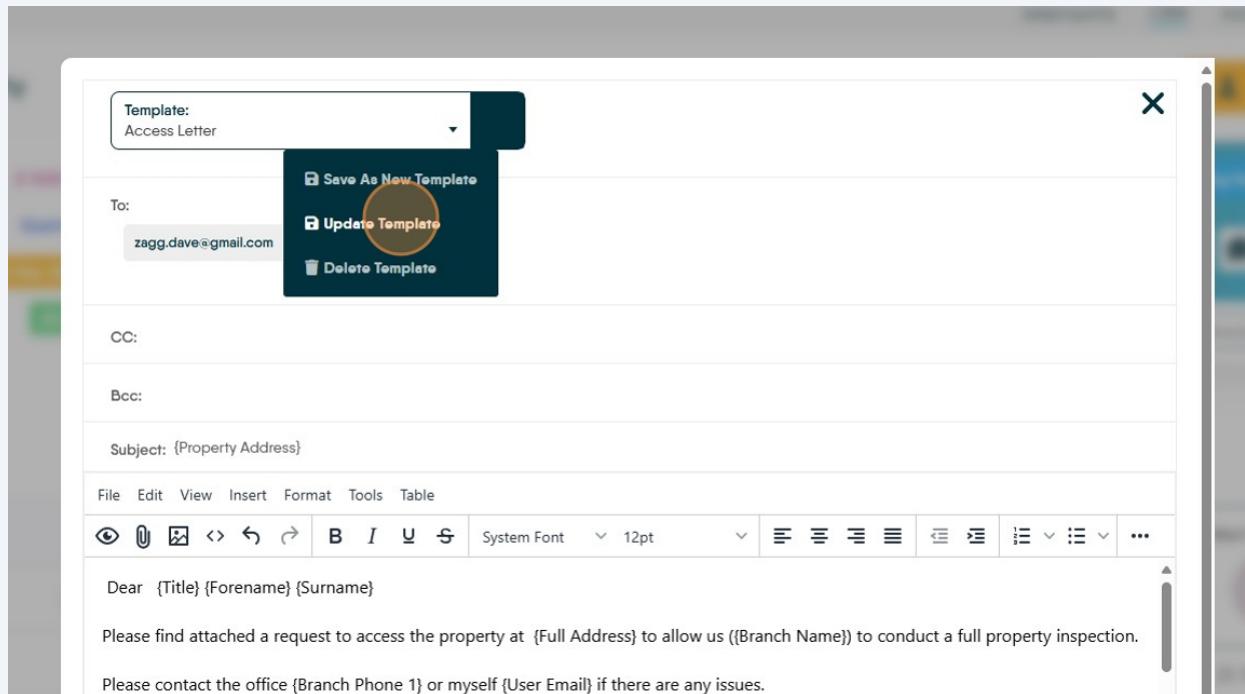
7 If required remove the additional spaces from the text.



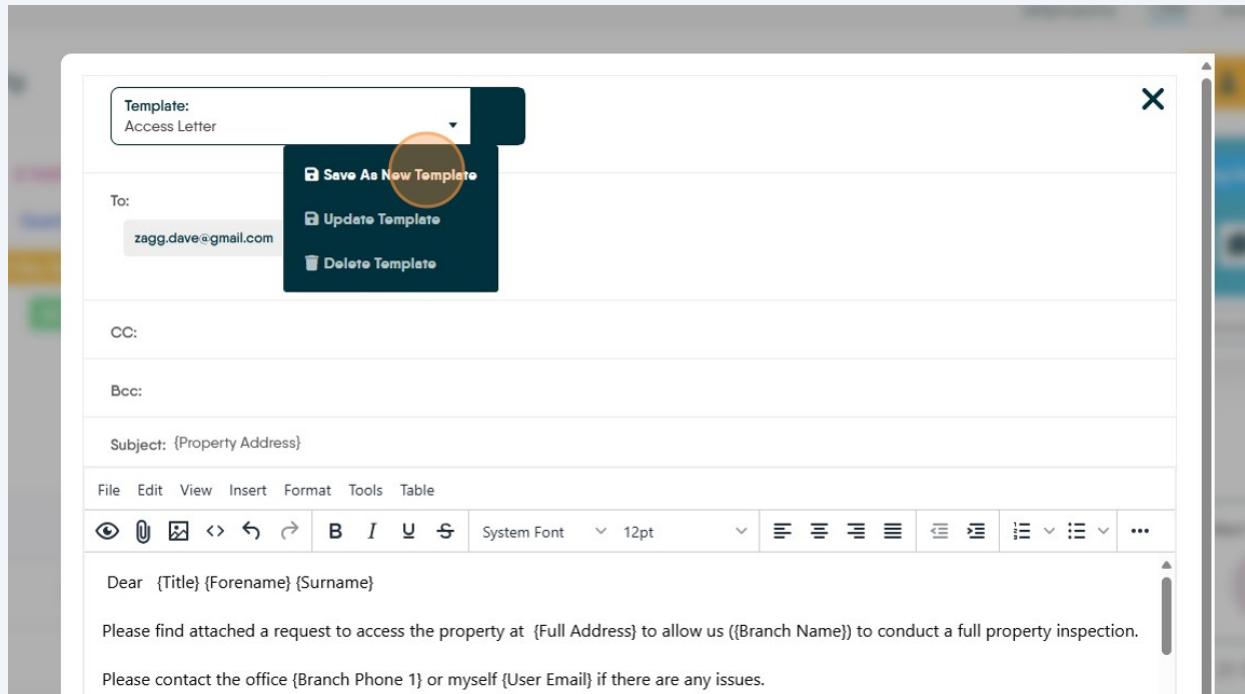
8 To save or update the templates click here.



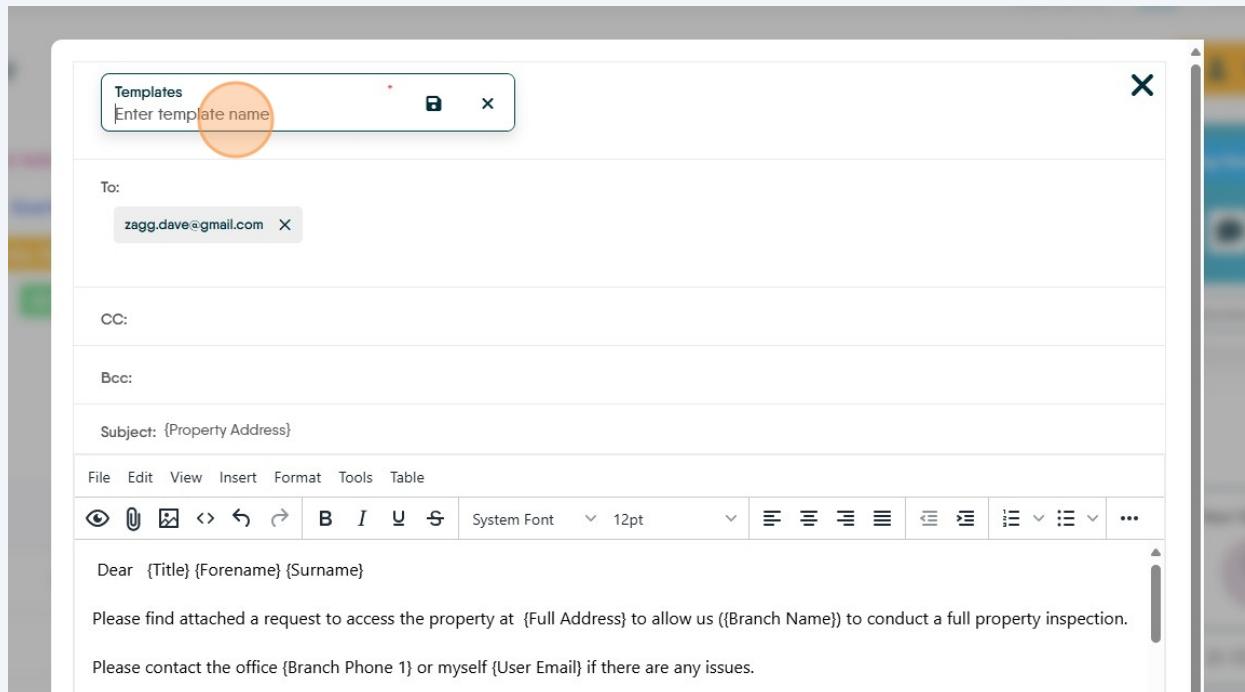
9 Click "Update Template" to save the updated template.



10 Click "Save As New Template"



11 Click the "Templates" field and name the template.



12 Click here to save the new template.

