

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 displays the CRM interface for a tenant record. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar lists various account details and navigation options. The main content area shows tenant information, including contact details, address, and financial data.

Tenant Details:

- LA:** Ms Lettings Applicant136
- Email:** zagg.dave@gmail.com
- Phone:** 07854213212
- Address:** 715 Pelaw Crescent, Chester le Street
- Status:** Primary Tenant

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: Quarterly

2 Click here.

The screenshot shows the iamproperty CRM interface. At the top, there's a navigation bar with links for My day, Lettings, Sales, Accounts, Reporting, and Communications. A search bar and a 'My account' button are also present. The main header displays the tenant's name, 'Ms Lettings Applicant136', along with contact details and a 'Send Email' button. Below this, the property address '715 Pelaw Crescent, Chester le Street' is shown, along with a 'Primary Tenant' tag. A form section contains fields for Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status (Prebooked). The 'Tenant Rent Details' section features five cards: Rent (£1450.00), Deposit (£1670.00), Holding Deposit (£111.54), Collection Day (Same Day), and Next Rent Due (21/03/2025). A 'Rent Period' section is partially visible at the bottom.

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

The screenshot shows an email composition window. The header includes fields for CC, Bcc, and Subject (Property Address). Below these is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with various formatting options. The main body of the email is empty, with a large orange circle indicating where to click and type the body text. At the bottom, there's a 'Template Tags' section with a grid of buttons for inserting dynamic content, such as 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, and 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"

Bcc:

Subject: {Property Address}

File Edit View Insert Format Tools Table

System Font 12pt

Dear

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		

Send Email ➤

Bcc:

Subject: {Property Address}

File Edit View Insert Format Tools Table

System Font 12pt

Dear {Title}

{Forename}

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		

Send Email ➤

Subject: {Property Address}

File Edit View Insert Format Tools Table

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Dear {Title} {Forename}|

{Forename}

Bcc:

Subject: {Property Address}

File Edit View Insert Format Tools Table

👁️ 📎 🖼️ <> ↶ ↷ **B** *I* U 🔗 System Font 12pt

Dear {Title} {Forename}

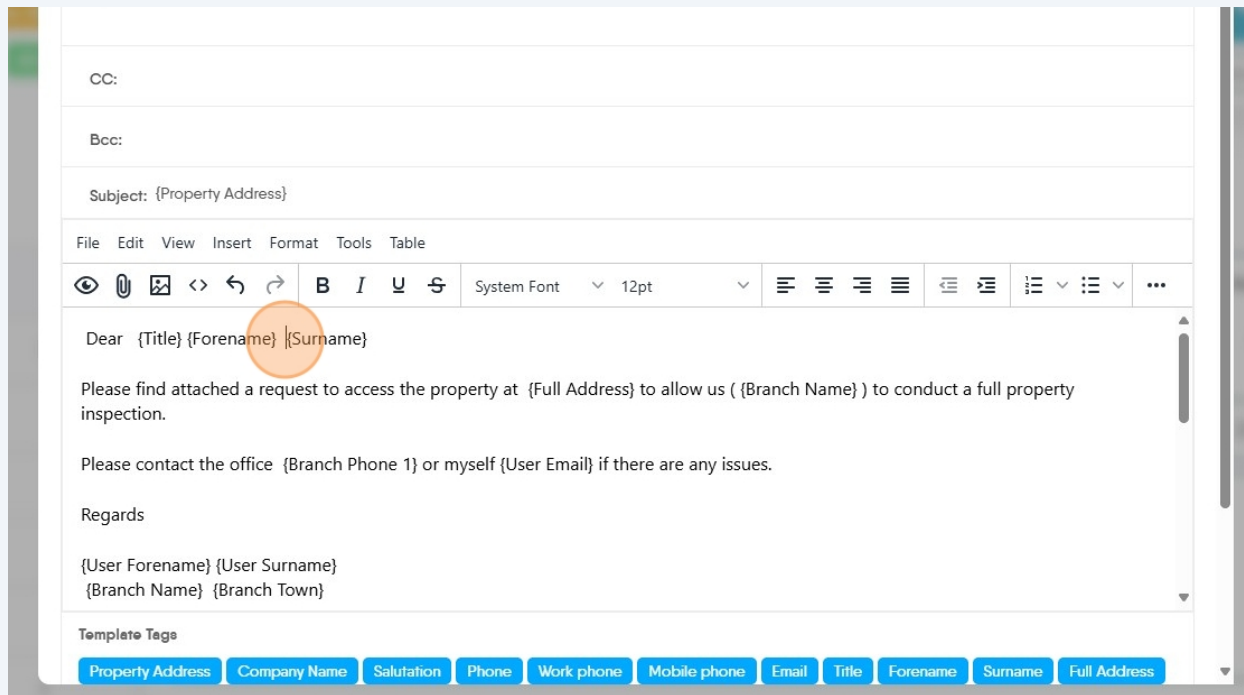
{Forename}

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		

Send Email ➤

5 Click here.



CC:

Bcc:

Subject: {Property Address}

File Edit View Insert Format Tools Table

System Font 12pt

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.

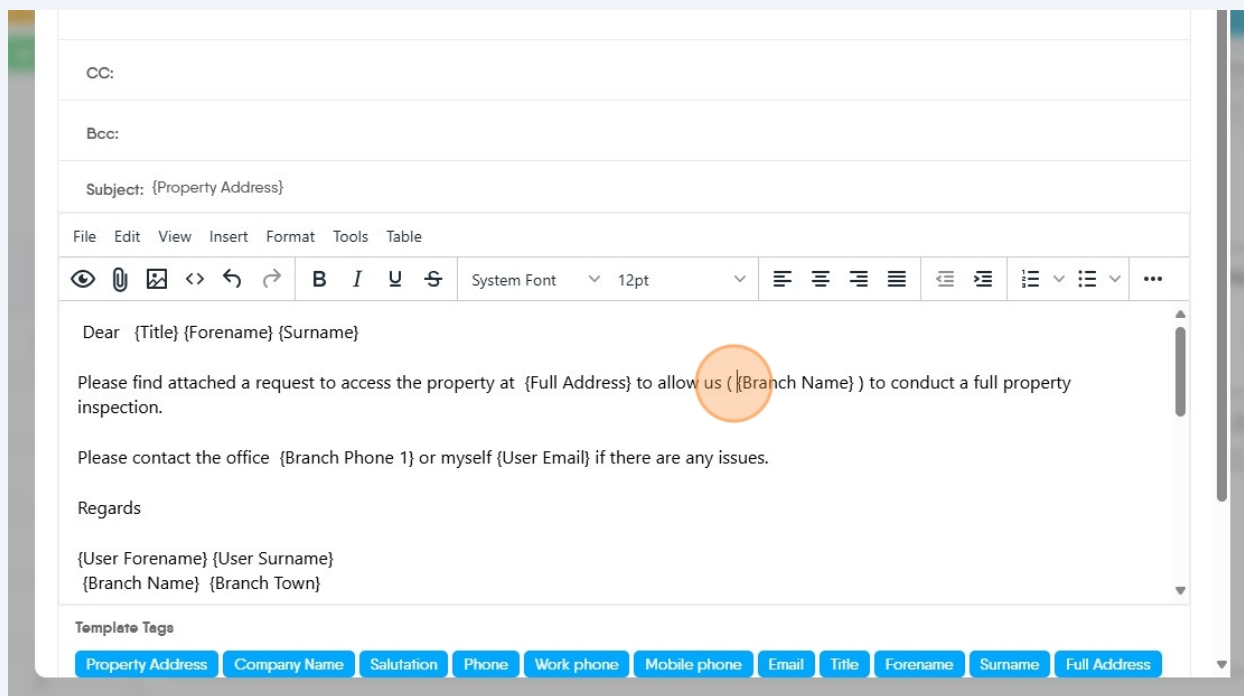
Regards

{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

System Font 12pt

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.

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

8 To save or update the templates click here.

Show template options

Template: Access Letter

To:

zagg.dave@gmail.com X

CC:

Bcc:

Subject: {Property Address}

File Edit View Insert Format Tools Table

Dear {Title} {Forename} {Surname}

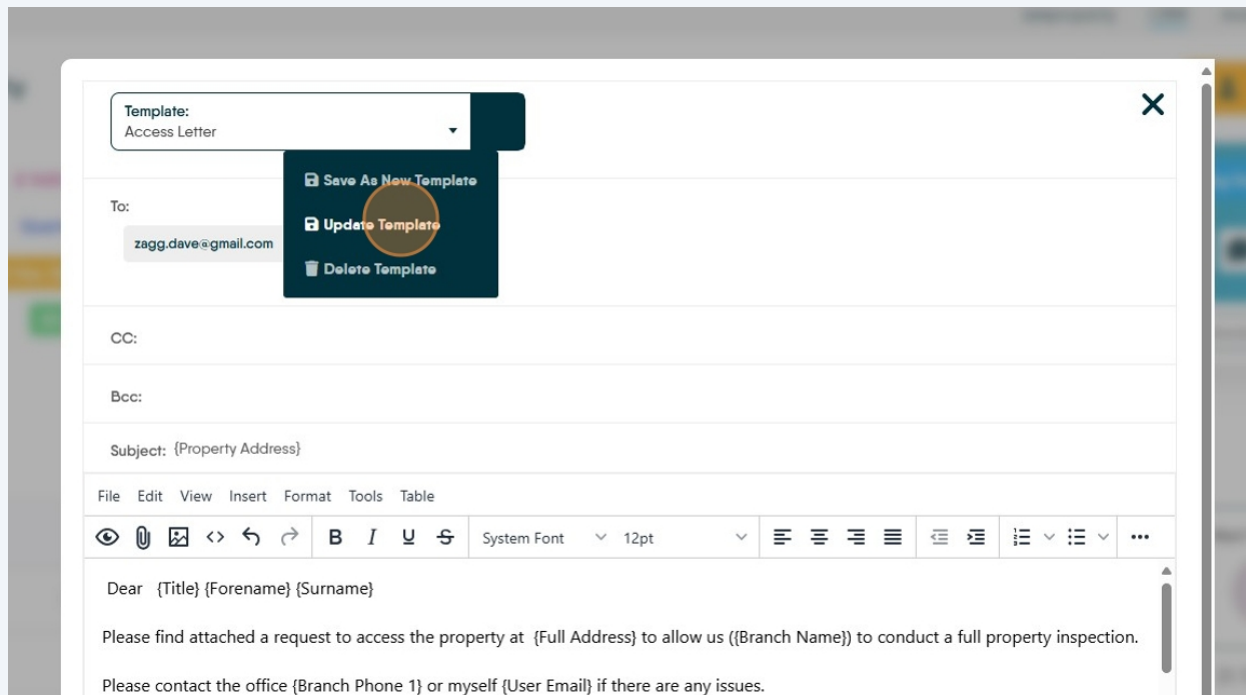
Please find attached a request to access the property at {Full Address} to allow us ({Branch Name}) to conduct a full property inspection.

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

Template Tags

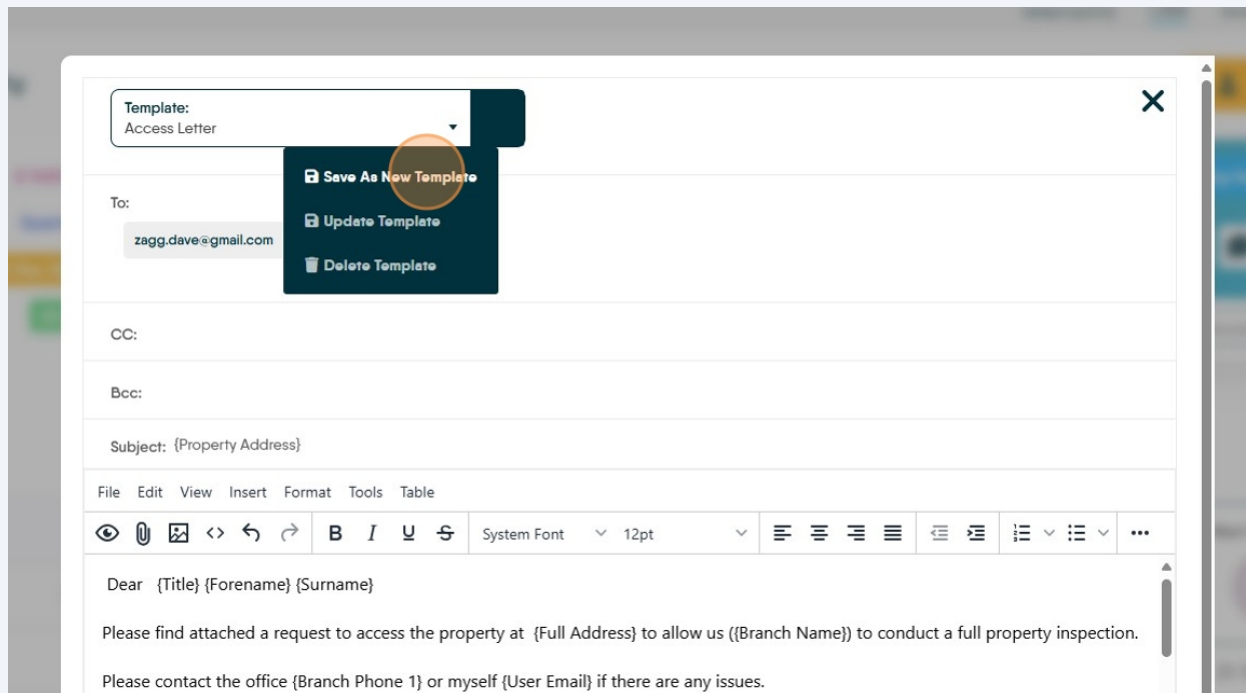
Property Address Company Name Salutation Phone Work phone Mobile phone Email Title Forename Surname Full Address

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



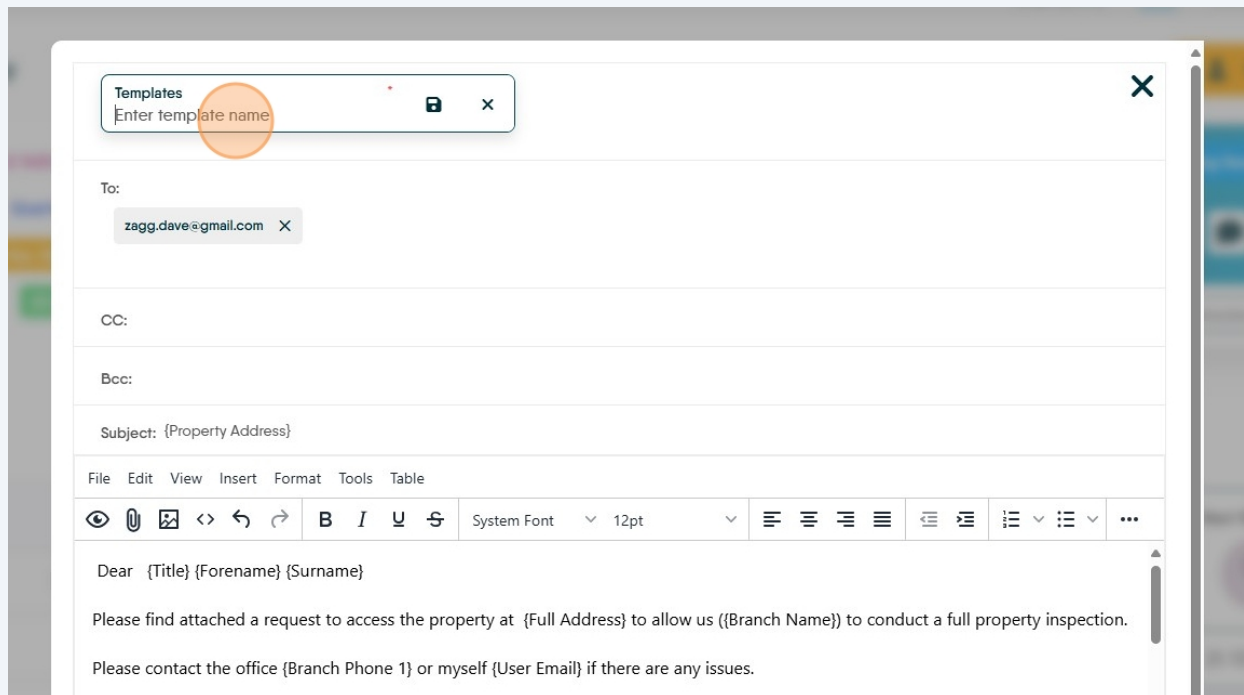
The screenshot shows a template editor window titled "Template: Access Letter". The window has a dark blue header bar with a close button (X) in the top right corner. Below the header, there is a "To:" field with the email address "zagg.dave@gmail.com". A dark blue overlay menu is positioned over the "To:" field, containing three options: "Save As New Template", "Update Template" (highlighted with a yellow circle), and "Delete Template". Below the "To:" field, there are fields for "CC:", "Bcc:", and "Subject: {Property Address}". A menu bar with options "File", "Edit", "View", "Insert", "Format", "Tools", and "Table" is located below the subject field. Below the menu bar is a toolbar with various icons for text formatting (bold, italic, underline, strikethrough, text color, background color, bullet points, numbered list, indent, outdent, link, unlink, etc.). The main text area contains the following text: "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.", and "Please contact the office {Branch Phone 1} or myself {User Email} if there are any issues."

- 10 Click "Save As New Template"



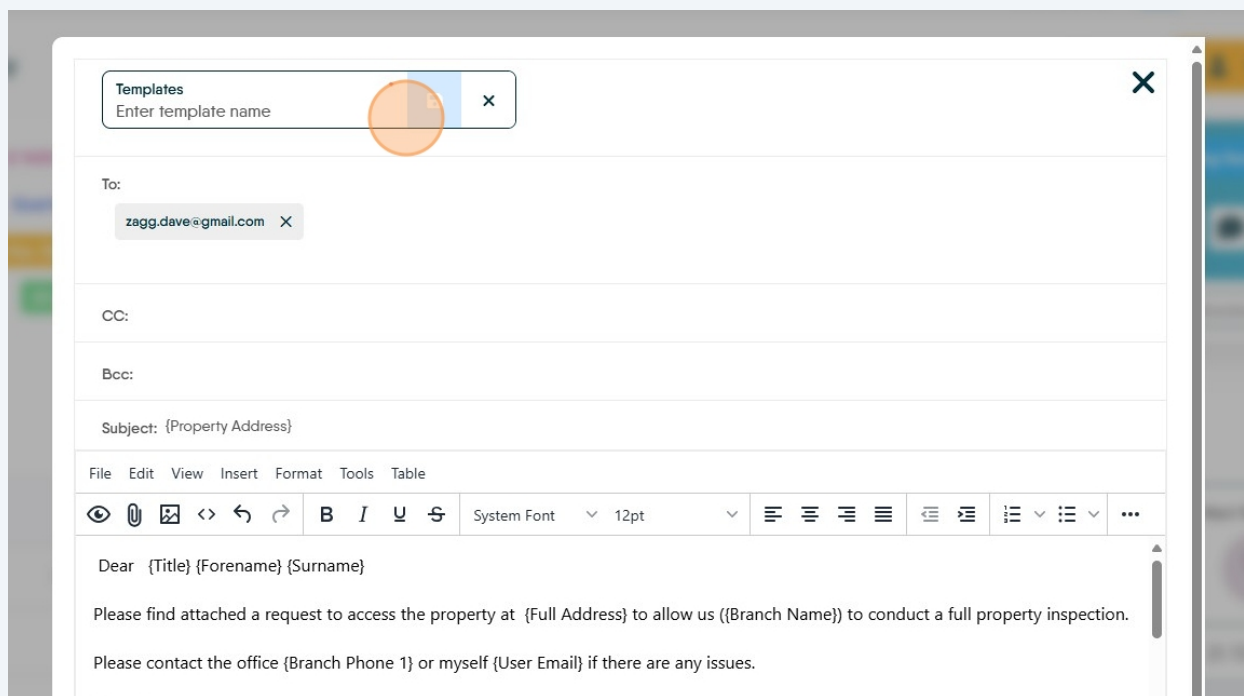
The screenshot shows the same template editor window as above, but with the "Save As New Template" option in the dark blue overlay menu highlighted with a yellow circle. The rest of the window, including the "To:" field, "CC:", "Bcc:", "Subject:" fields, menu bar, toolbar, and main text area, is identical to the previous screenshot.

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



The screenshot shows an email composition window. At the top, there is a 'Templates' field with a placeholder text 'Enter template name'. This field is highlighted with an orange circle. Below the 'Templates' field, there are fields for 'To:', 'CC:', 'Bcc:', and 'Subject:'. The 'To:' field contains the email address 'zagg.dave@gmail.com'. The 'Subject:' field contains the placeholder text '{Property Address}'. Below the header fields, there is a menu bar with options: File, Edit, View, Insert, Format, Tools, Table. Below the menu bar, there is a toolbar with various icons for text formatting and alignment. The main body of the email contains the following text: '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.', and 'Please contact the office {Branch Phone 1} or myself {User Email} if there are any issues.'

- 12 Click here to save the new template.



The screenshot shows the same email composition window as in the previous step. The 'Templates' field is still highlighted with an orange circle. The rest of the window, including the 'To:', 'CC:', 'Bcc:', and 'Subject:' fields, the menu bar, toolbar, and the main body text, remains the same as in the previous step.