Sending Group Emails to Tenants for Compliance Visits

This guide provides a straightforward process for efficiently sending group emails to tenants regarding compliance visits, ensuring clear communication and compliance.

By following these steps, property managers can save time and streamline their communication efforts, enhancing tenant relations. Once sent these messages are added to the journals.

1 There are a couple of ways to do this.

If you have the Gas Safety (or any compliance record) dates already in the CRM records, use the Activity List and set the date range to how many days ahead you want to send the notifications.

Use the Property List views and select the Property from there and then follow the instructions as from slide 5.

2 Navigate to **https://crm.iamproperty.com/Dashboards/Lettings**

3   Click here.

Activity List   ⟳ ⚙

≡	Landlord Checklist	7	⬈
🗊	Tenant Checklist	1	⬈
🗎	Tenancy Checklist	1	⬈
≡	Lettings Applicant Checklist	1	⬈
🗄	Accounts Overdue	40	⬈
◉	Gas Safety Due	39	⬈
⚡	Fixed Wiring (EICR) Due	9	⬈
🧯	Fire Extinguishers Due	2	⬈
🏠	Carbon Monoxide Due	2	⬈
📊	EPC Due	1	⬈
🏠	Appraisal Checklist	2	⬈

Gas Safety Due ✕

✉ 💬 🖨 📤 🔻 ☰   ⟳   Search

		Negotiator	Property	Le
⋮	☐	David-George Morgan	17 Yew Tree Close, Hurworth, Darlington DL2 2HX	G
⋮	☐	Training Dave	69 Kingsway, Darlington DL1 3EY	Le
⋮	☐	David-George Morgan	57 Elton Parade, Darlington DL3 8PJ	M
⋮	☐	Training Dave	32 Yew Tree Close, Hurworth, Darlington DL2 2HX	Ad
⋮	☐	Training Dave	1091 Pelaw Crescent, Chester le Street DH2 2HX	Le
⋮	☐	Training Dave	774a Pelaw Crescent, Chester le Street DH2 2HX	la
⋮	☐	David-George Morgan	1 Yew Tree Close, Hurworth, Darlington DL2 2HX	Vi
⋮	☐	Training Dave	69 Pelaw Crescent, Chester le Street DH2 2HX	D
⋮	☐	David-George Morgan	Flat 14 Westpoint, Northumberland Street, Darlington DL3 7HB	O
⋮	☐	Training Dave	199 Kingsway, Darlington DL1 3EY	M

◀ ▶ ◀   1 to 10 of 39   ⏮

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4   From the menu click "View Property"

Activity List   ⟳ ⚙

≡	Landlord Checklist	7	⬈
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		Dave	199 Kingsway, Darlington DL1 3EY	M

Add Call (Landlord)

Log Call (Landlord)

Add Journal (Property)

View Property

1 to 10 of 39   ⏮

5 Click the property you want to view

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 92   Landlords   Tenants   Lettings Applicants   Contractors   Guarantors   Sales Properties   Vendors   Sales Applicants   Solicitors   Sales Co

#all   ☐ Available   ☐ Let Agreed   ☐ Appraisal   ☐ Arc

'#all' returns 92 properties

Property Address	Reference	Rent	Town
913 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX		1,500 PCM	Cheste
2 Meadow Bank Close, Hurworth Place, Darlington, County Durham, DL22HZ		0	Darling
Alternative Communication Systems Acer Court, North Leigh Business Park, North Leigh, Witney, Oxfordshire, OX296SW		0	Witney
8229 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX		0	Cheste
199 Kingsway, Darlington, County Durham, DL1 3EY		0	Darling
7117 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX		0	Cheste
867 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX		0 PCM	Cheste
715 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX		1,500 PQ	Cheste
129 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX		1,200 PCM	Darling

6 Click "View tenants"

iamproperty   CRM   movebutler   iamsold

Lettings ⌄   Sales ⌄   Accounts ⌄   Reporting ⌄   Communications ⌄   ⊞   📅   🔔   🔍   [👤 My account]

⊘ Appraisal   ⓘ Warning

Flat 14 Westpoint, Northumberland Street, Darlington, DL3 7HB
🛏 2   🛁 2   £ 750.00 Per Person Per Week
Available   1 Tenant

Lead landlord: [View Landlords]
Mr Oliver Hardy

Lead tenant: [View Tenants]
Mrs Audrey Morgan

📅   🖼   📍   📷   ⋮

Reference: Negotiator: David-George Morgan   Branch Morgan & Co   Status Live
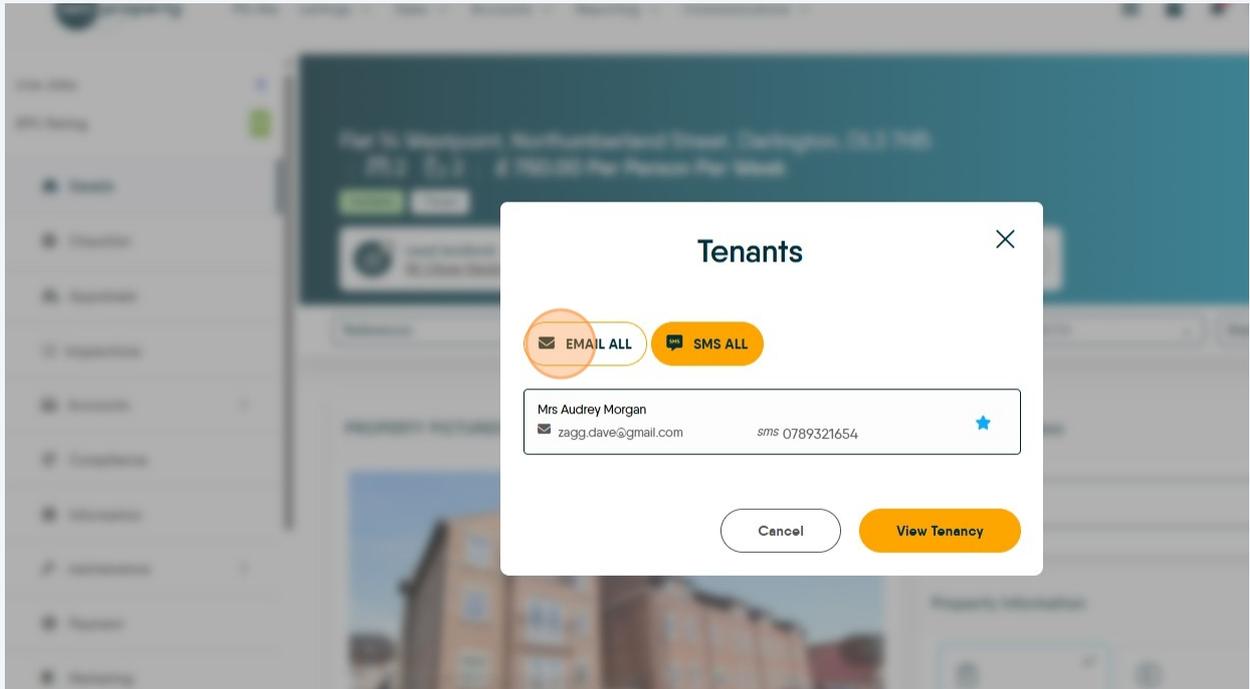
PROPERTY PICTURES   [☁ Upload]

Property Address   [📍 Edit Address]
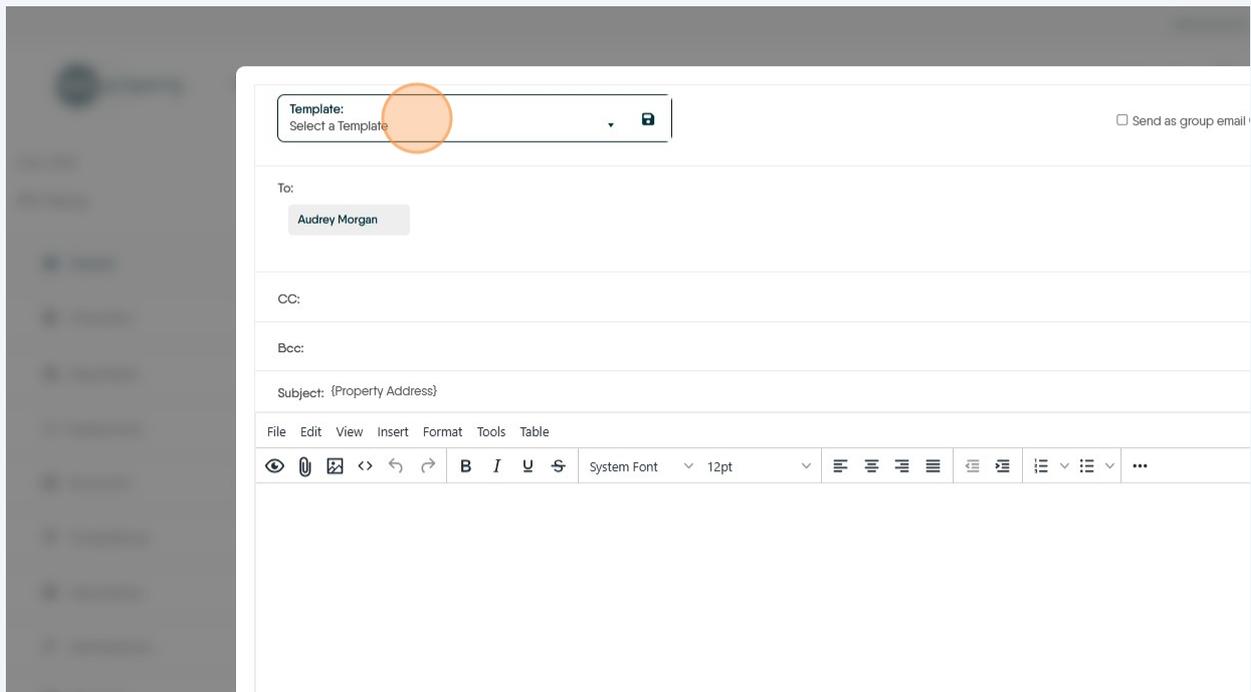
Postcode
DL3 7HB   🔍
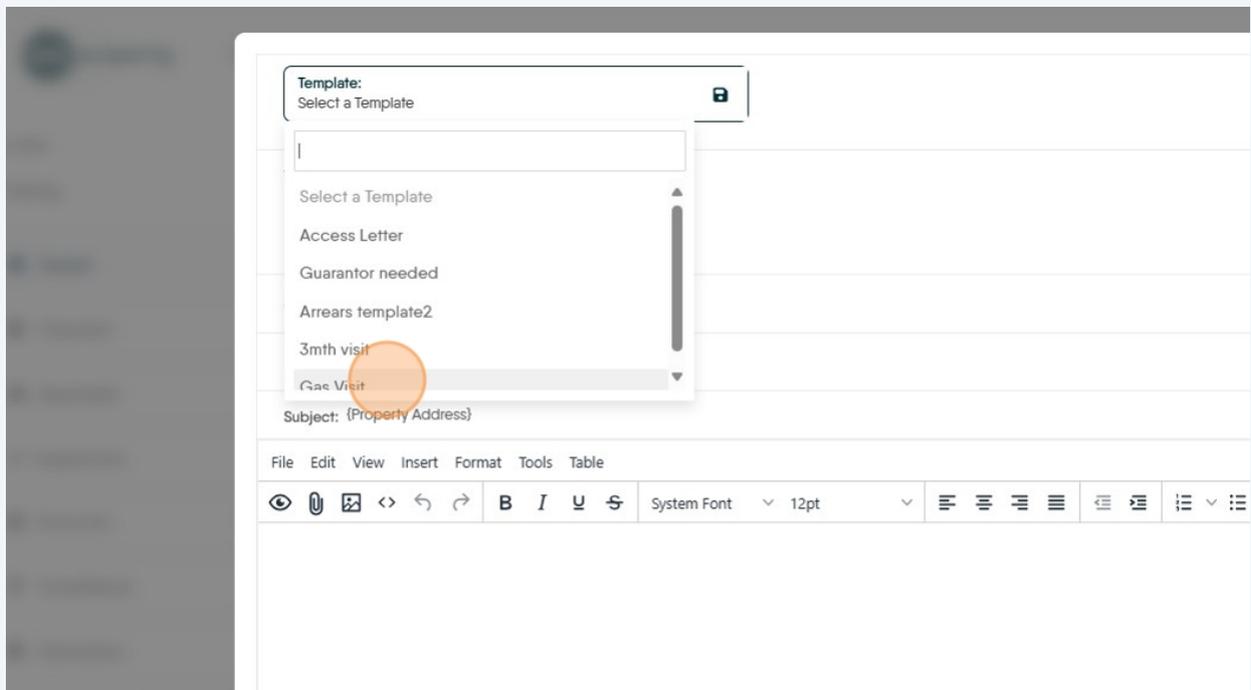
Property Information

7   Click "EMAIL ALL"

⚠ Alert! There are no default templates on the CRM, templates need to be added. Once added the template will be available until deleted.

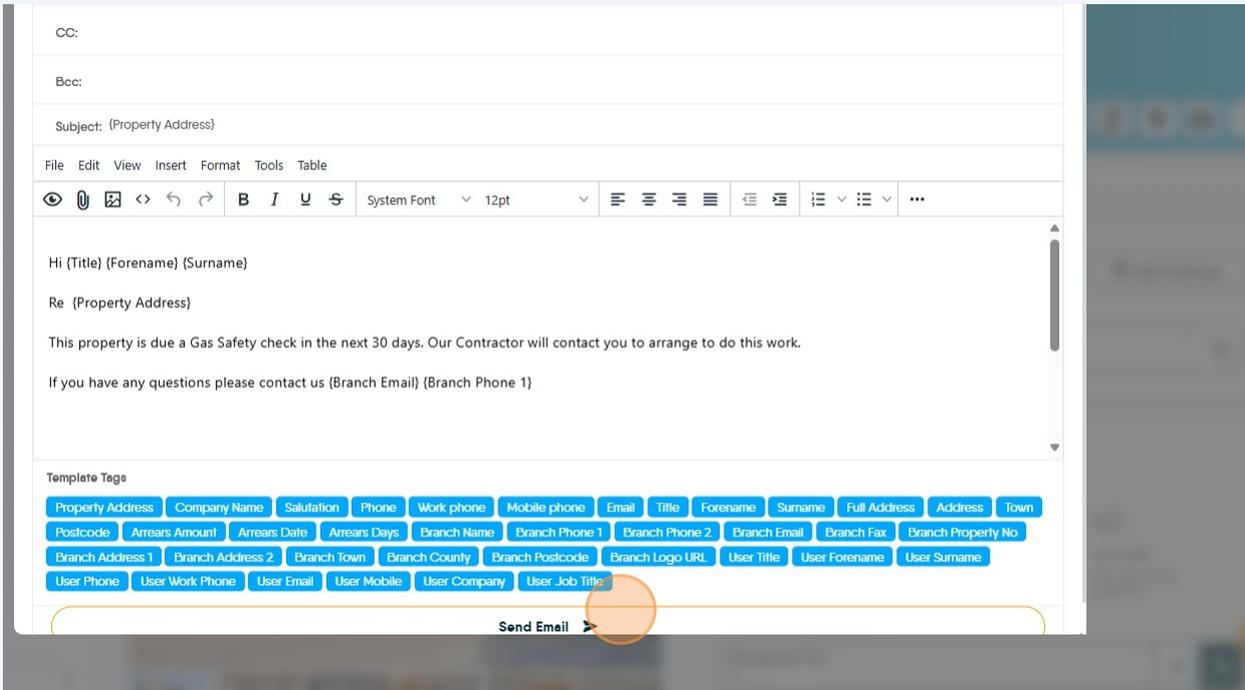**8** Click "Select a Template" or add your new template.

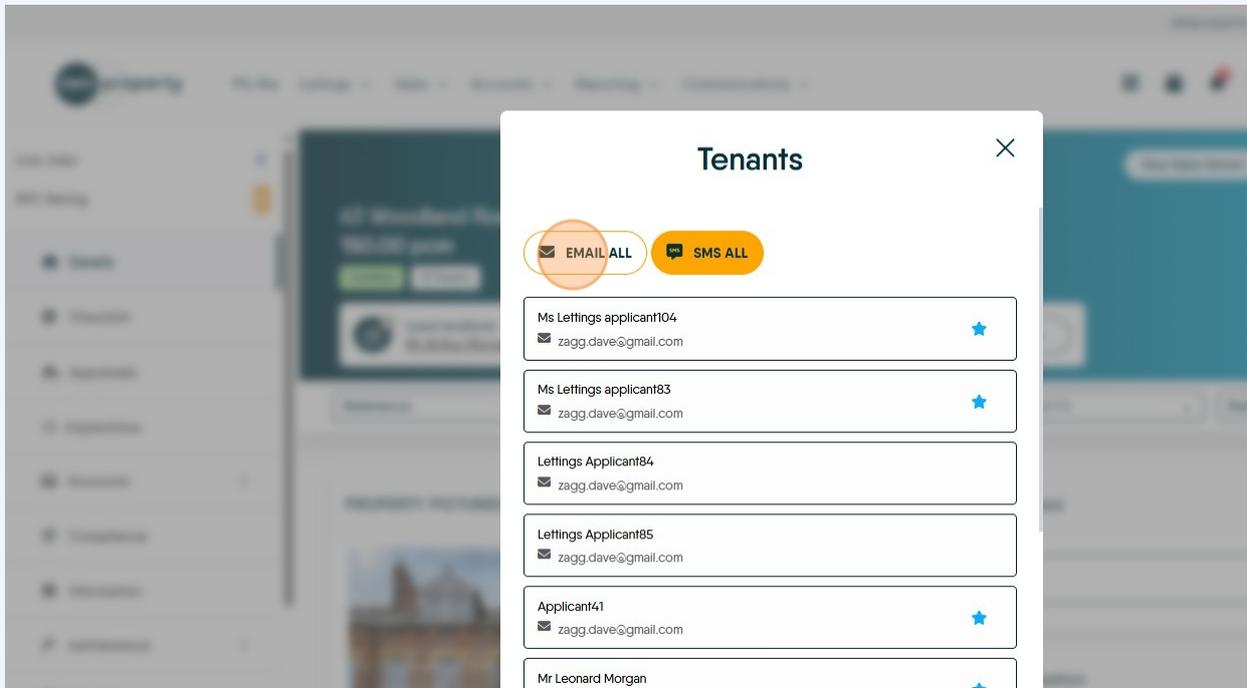**9** Select the template you want to use from the list.

10 The template will load and show on the screen, the words between the brackets {Property Address} are merge tags that will bring in the appropriate text. Click "Send Email"
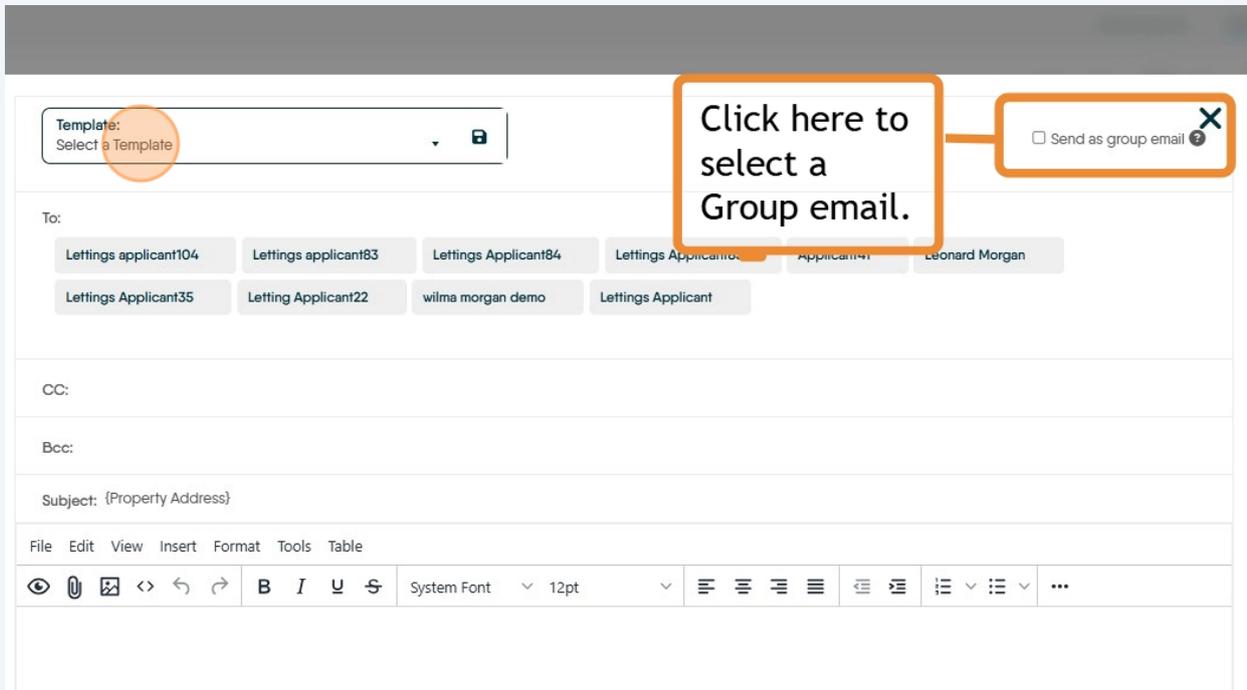
CC:

Bcc:

Subject: {Property Address}

File   Edit   View   Insert   Format   Tools   Table

Hi {Title} {Forename} {Surname}

Re {Property Address}

This property is due a Gas Safety check in the next 30 days. Our Contractor will contact you to arrange to do this work.

If you have any questions please contact us {Branch Email} {Branch Phone 1}

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 ➤

11 If you are in a property with multiple tenants, click "EMAIL ALL"

Tenants ✕

📧 EMAIL ALL   💬 SMS ALL

Ms Lettings applicant104
✉ zagg.dave@gmail.com   ⭐

Ms Lettings applicant83
✉ zagg.dave@gmail.com   ⭐

Lettings Applicant84
✉ zagg.dave@gmail.com

Lettings Applicant85
✉ zagg.dave@gmail.com

Applicant41
✉ zagg.dave@gmail.com   ⭐

Mr Leonard Morgan
                                         ⭐

12 All the tenants will be added to the email, as shown. There are 2 options, the default is that each person gets a personalised email to them, the other is that there is a group email sent to all the tenants at the same time. To select Group email click the option in the top right corner. Then click "Select a Template".

13 Select the template you wish to use. Then click "send".