

Using Email and Mail Merge in CRM



This guide offers a step-by-step approach to effectively using email and mail merge features in the Communications module of CRM.

By following the instructions, users can enhance their operational efficiency, customise messages, and track email interactions seamlessly.

Whether you're looking to improve client engagement or save time on correspondence, this guide provides the tools needed for effective communication within the CRM platform.

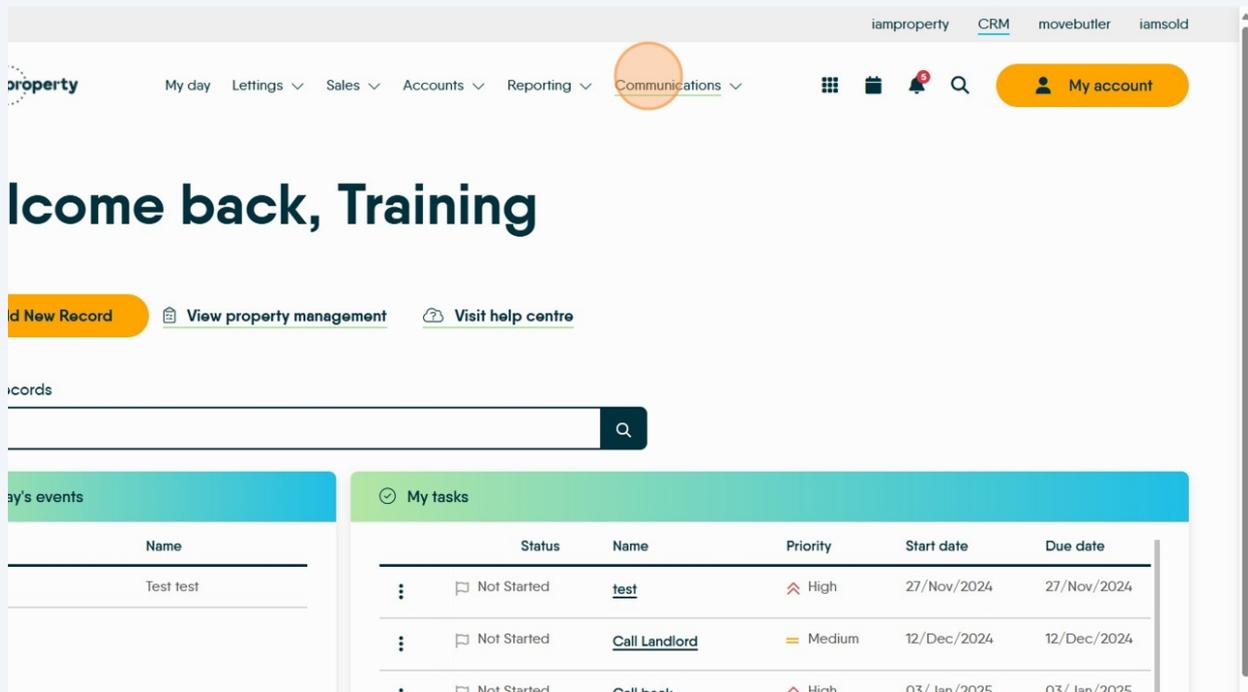
1 Navigate to <https://crm.iamproperty.com/MyDay>

The screenshot shows the CRM MyDay dashboard. At the top, there is a navigation bar with the iam property logo, menu items (My day, Lettings, Sales, Accounts, Reporting, Communications), and utility icons (grid, calendar, notifications, search, My account). Below the navigation bar, a large heading reads "Welcome back, Training". Underneath, there are three buttons: "Add New Record" (orange), "View property management" (blue), and "Visit help centre" (blue). A search bar labeled "Search all records" is positioned below the buttons. The dashboard is divided into two main sections: "Today's events" and "My tasks".

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	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025
Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

2 Click "Communications"



The screenshot shows the iamproperty CRM interface. The top navigation bar includes the iamproperty logo, a menu with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications' (highlighted with an orange circle), and utility icons for a grid, calendar, notifications, and search. A 'My account' button is on the right. Below the navigation, a large heading reads 'I come back, Training'. A yellow 'Add New Record' button is followed by links for 'View property management' and 'Visit help centre'. A search bar is present. Two panels are visible: 'My events' with a table containing one row 'Test test', and 'My tasks' with a table containing three rows.

Status	Name	Priority	Start date	Due date
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025

3 There are 3 options for sending messages, Email, SMS and Mail (Letter) merge. This guide will look at each one separately. However the process is similar for each.

Email Merge

4 Click "Email Merge"

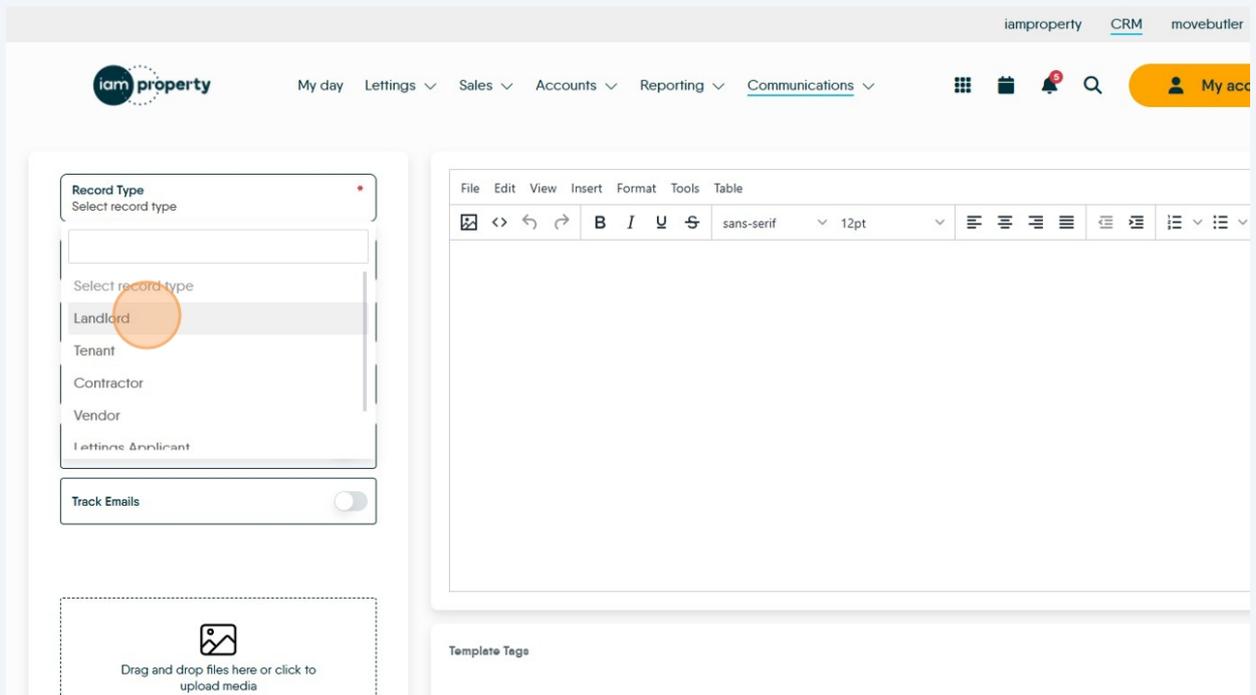
The screenshot shows the iAm property CRM interface. The top navigation bar includes "iamproperty", "CRM", and "movebutler". The main navigation menu has "My day", "Lettings", "Sales", "Accounts", "Reporting", and "Communications". The "Communications" menu is active, displaying a grid of options: "Email Merge" (highlighted with an orange circle), "E-Sign", "Marketing toolkit", "Email Tracker", "Mail Merge", and "SMS Merge". Below this grid, there are two sections: "Today's events" and "My tasks". The "My tasks" section contains a table with columns for Status, Name, Priority, Start date, and Due date.

Status	Name	Priority	Start date	Due date
<input type="checkbox"/> Not Started	Test	High	27/Nov/2024	27/Nov/20
<input type="checkbox"/> Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/20
<input type="checkbox"/> Not Started	Call back	High	03/Jan/2025	03/Jan/20

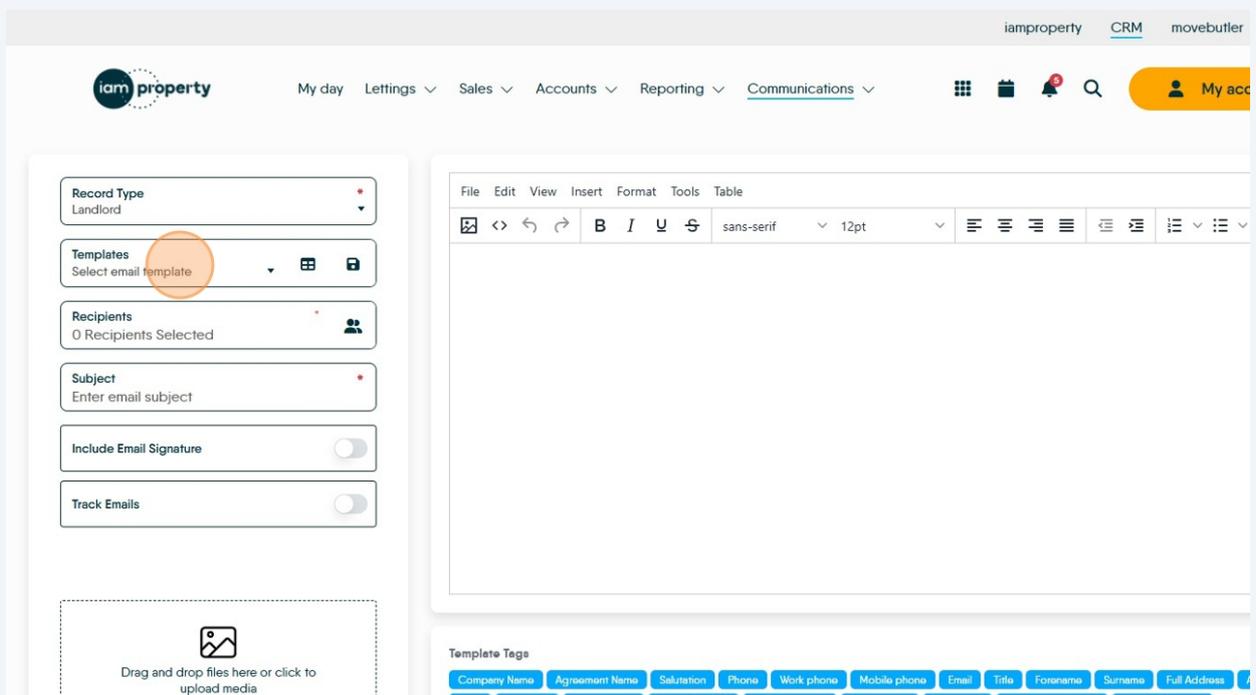
5 Click "Select record type"

The screenshot shows the iAm property CRM interface for the "Email Merge" configuration. The top navigation bar is the same as in the previous screenshot. The main navigation menu has "Communications" active. The configuration screen is divided into two main sections. On the left, there are several input fields and controls: "Record Type" (with a dropdown menu and "Select record type" text, highlighted with an orange circle), "Templates" (with a dropdown menu and "Select email template" text), "Recipients" (with "0 Recipients Selected" and a person icon), "Subject" (with "Enter email subject" text), "Include Email Signature" (with a toggle switch), and "Track Emails" (with a toggle switch). At the bottom left, there is a dashed box with an image icon and the text "Drag and drop files here or click to upload media". On the right, there is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with various icons for text formatting and alignment. The editor content area is currently empty.

6 Select the contact type from the drop down list.

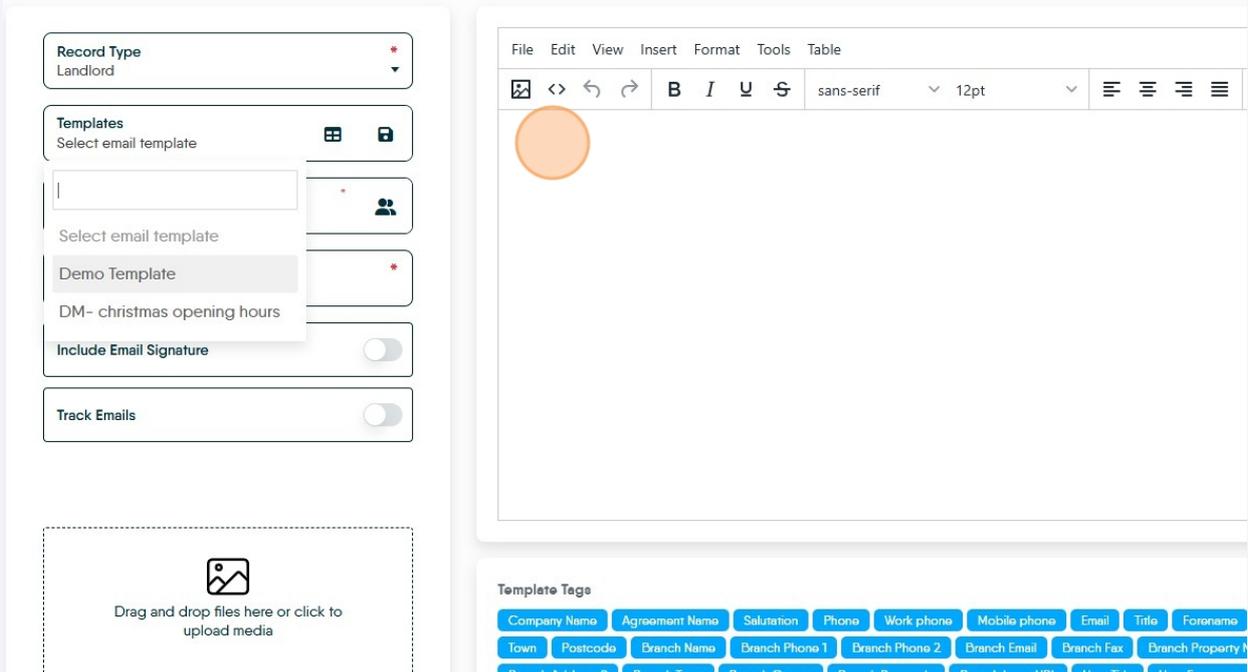


7 Click "Select email template"



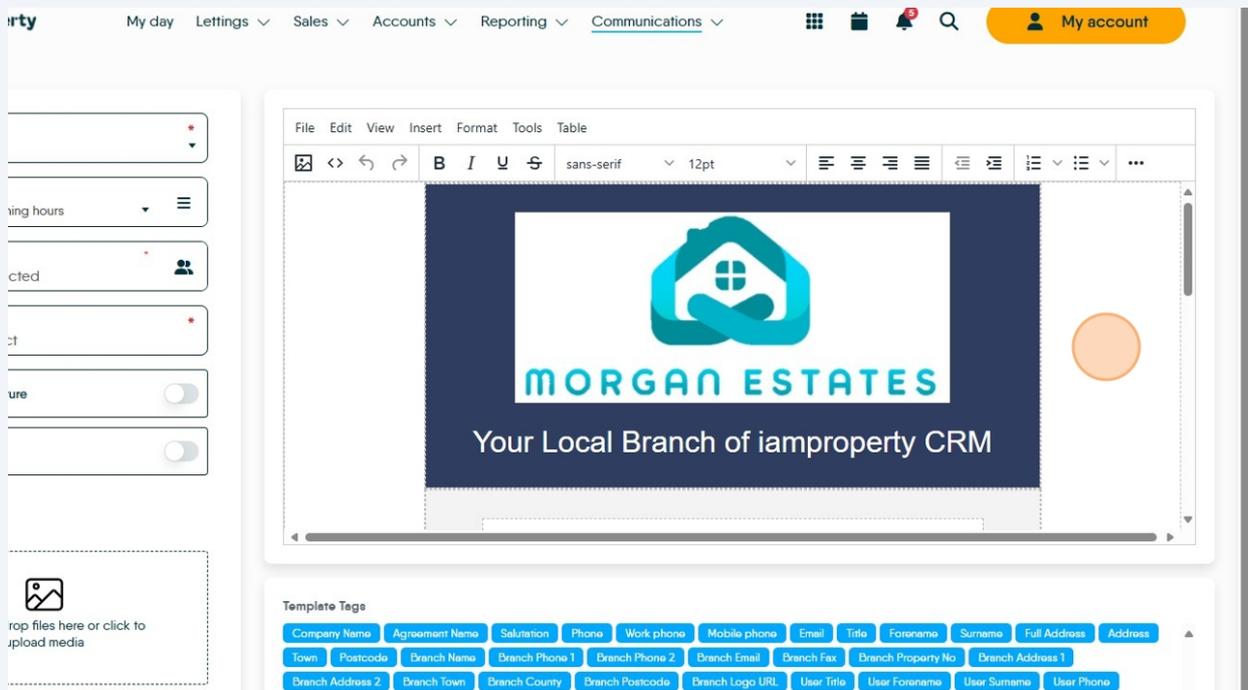
8

If there are no email templates created, one can be created easily by typing your message in the message field and adding the template tags to add personalisation to your email message.



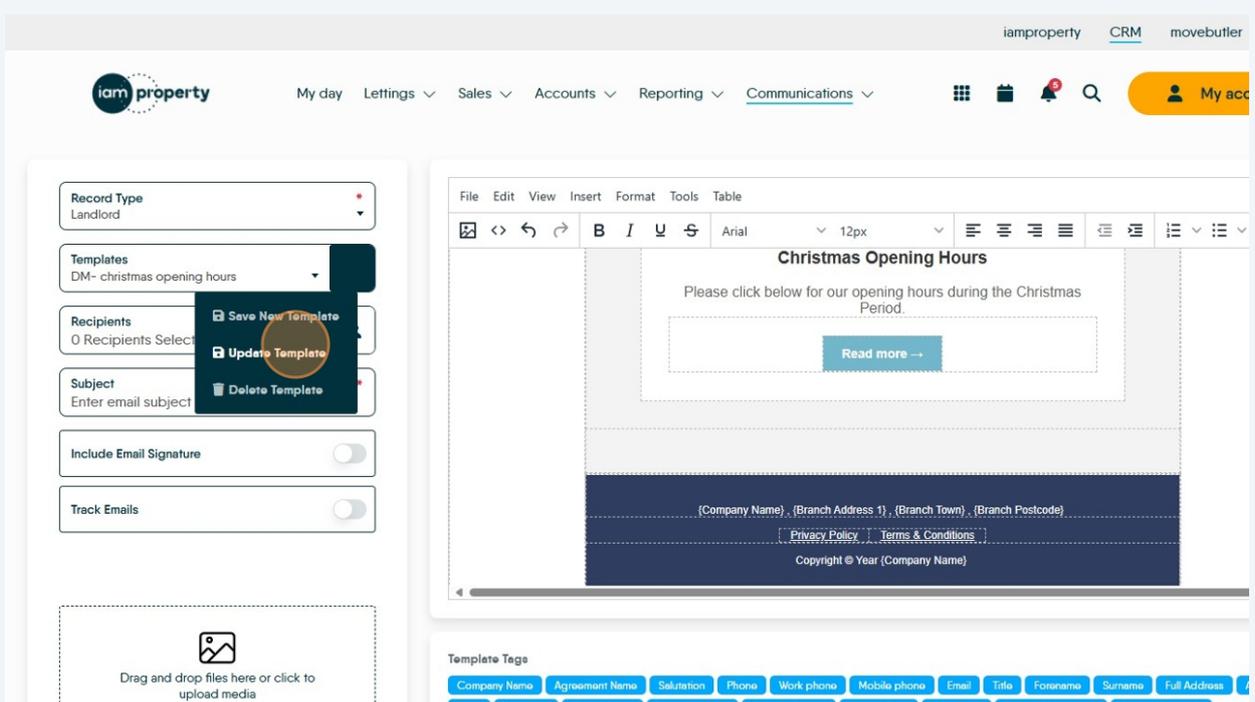
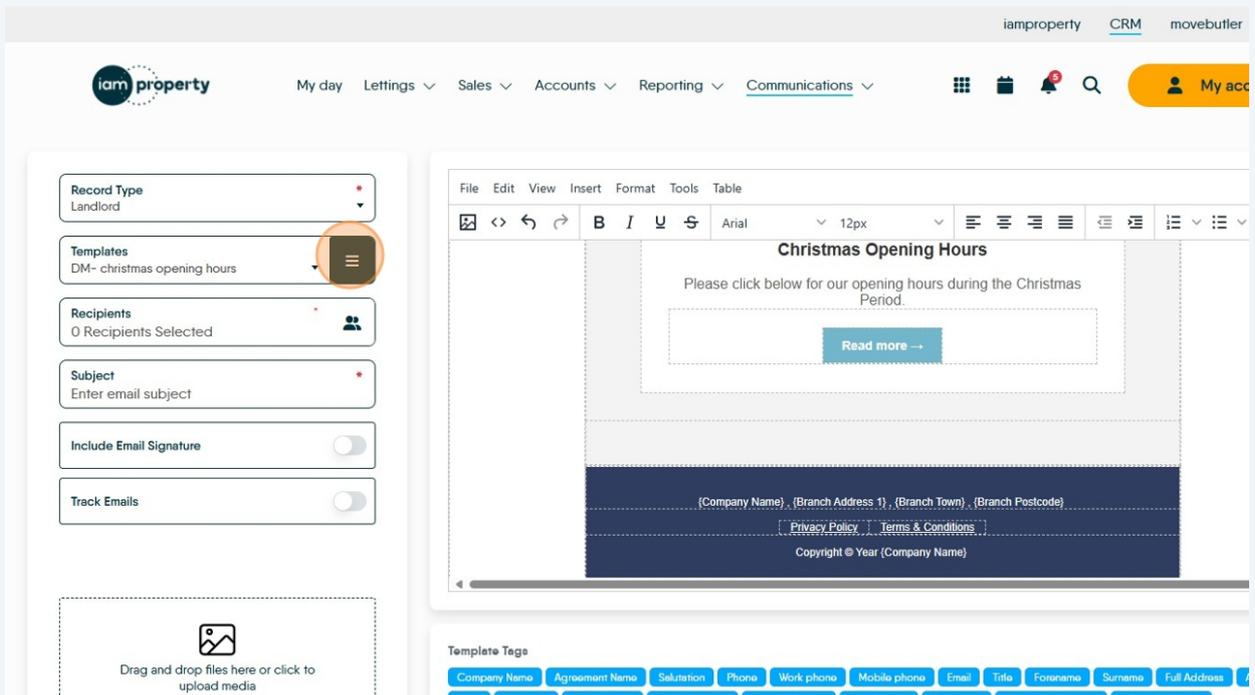
9

Templates can be very simple text, or using the supplied (or your own HTML) templates more complex. Users can also create their own templates and import them to CRM.



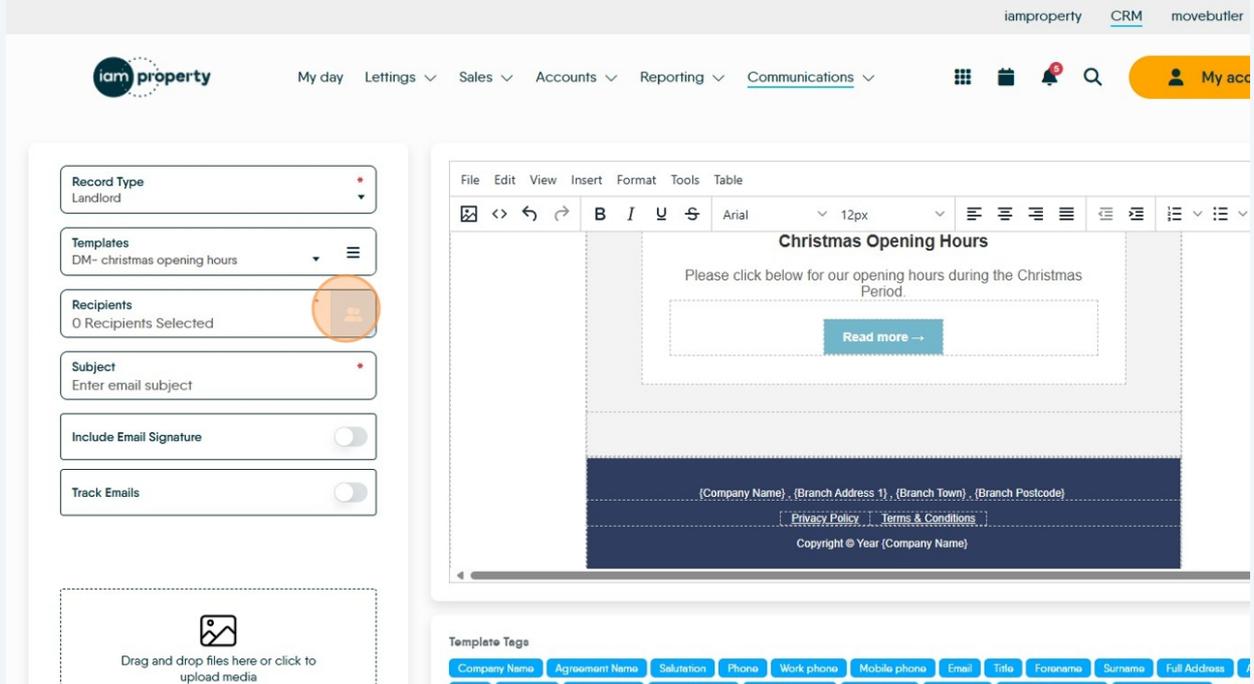
10

Templates can be updated, if this is done remember to save the update click the 3-line menu and then click "Update Template"



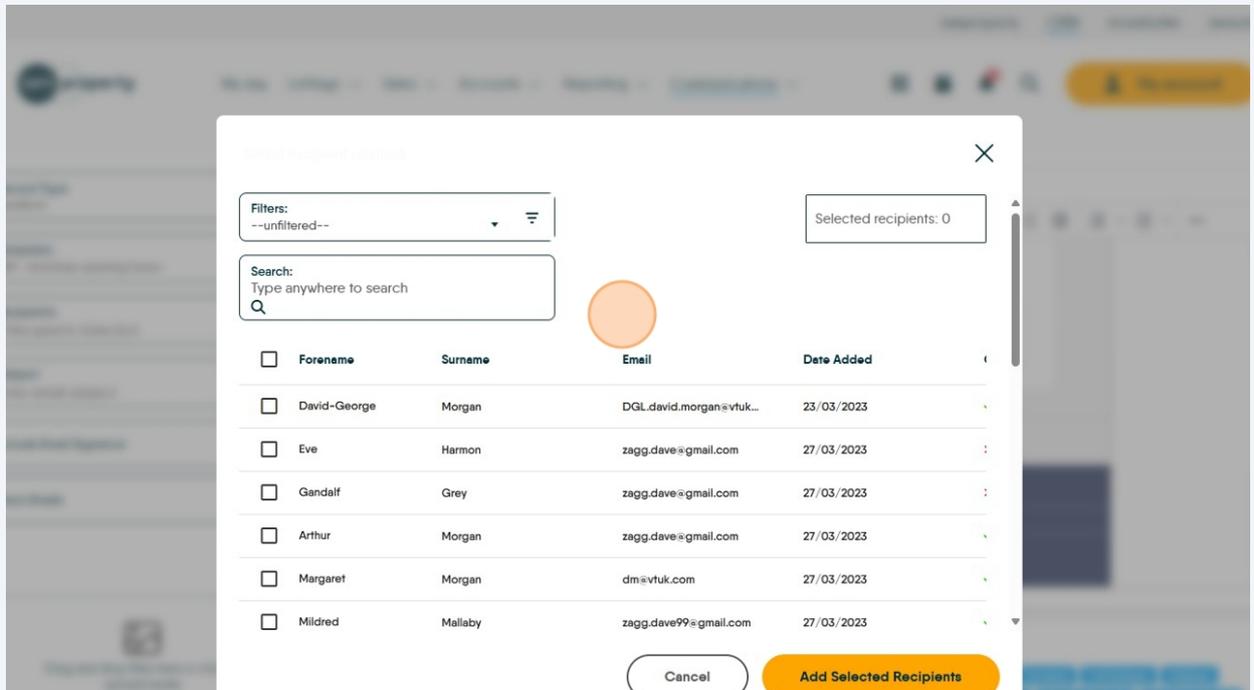
11

Select the recipients for the message, the type of contact has been selected previously, now you are selecting the actual contacts that are receiving the message.



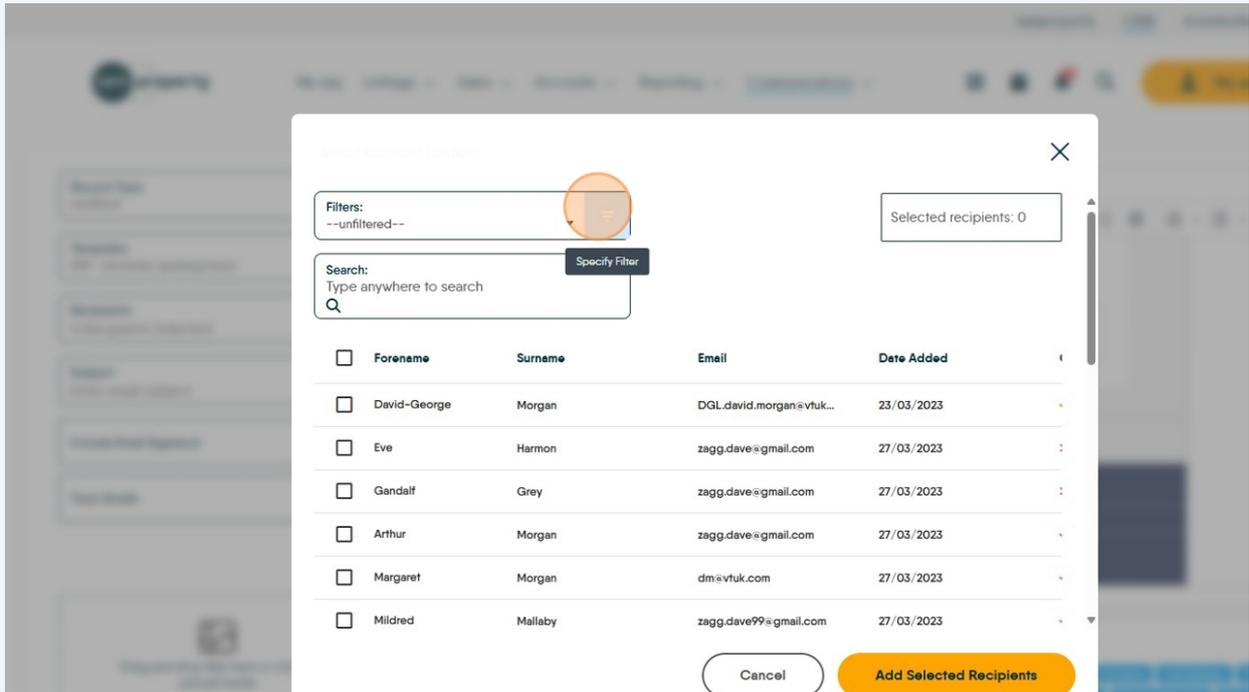
12

This will show a list of all the contacts in the record type previously selected. These can be further filtered to only send a message to specific contacts.



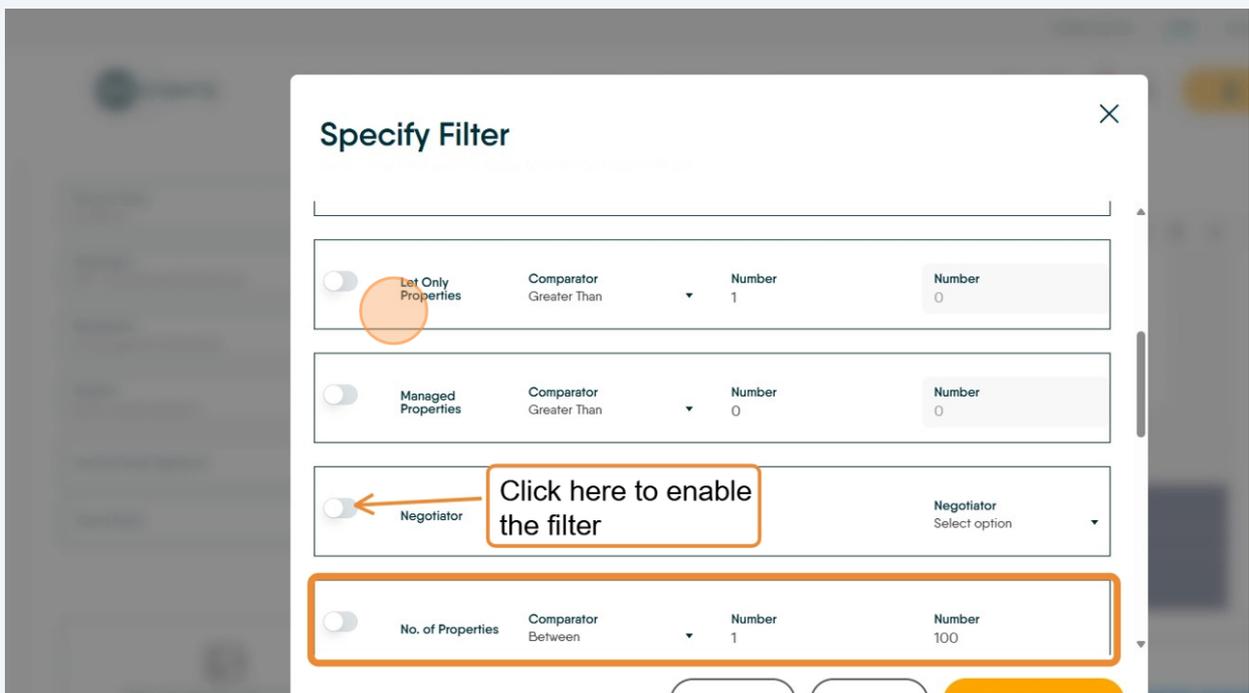
13

Click here to set the filter. Filters can be saved for use again, if this is the case select from the list otherwise select the filter options from the list.



14

The options for Let Only, Managed Properties, No. of Properties and a few others allow an option to be set that only shows contacts i.e Landlords that have a certain number of properties. In this option we have a filter set (but not enabled) that will show landlords with between 1 and 100 properties



15

Click the "Filter Name" field give the filter a name and click the 'Save' icon or 'Save and Apply' Click Apply to use the filter and not save it. Click here.

Filter configuration dialog box showing criteria: Rent Collect Properties (Number 1, Greater Than), Send Statement via (Email), Source (Select option), and Status (Archived). Buttons: Cancel, Apply, Save and Apply. Filter Name input field: Enter filter name.

Filter configuration dialog box showing criteria: Rent Collect Properties (Number 1, Greater Than), Send Statement via (Email), Source (Select option), and Status (Archived). Buttons: Cancel, Apply, Save and Apply. Filter Name input field: Enter filter name.

16

Click "--unfiltered--"
Click the name of the filter you want to use.

Select Recipients Listview

Filters: --unfiltered--

Selected recipients: 0

Search: Type anywhere to search

<input type="checkbox"/>	Forename	Surname	Email	Date Added
<input type="checkbox"/>	David-George	Morgan	DGL.david.morgan@vtuk...	23/03/2023
<input type="checkbox"/>	Eve	Harmon	zagg.dave@gmail.com	27/03/2023
<input type="checkbox"/>	Gandalf	Grey	zagg.dave@gmail.com	27/03/2023
<input type="checkbox"/>	Arthur	Morgan	zagg.dave@gmail.com	27/03/2023
<input type="checkbox"/>	Margaret	Morgan	dm@vtuk.com	27/03/2023
<input type="checkbox"/>	Mildred	Mallaby	zagg.dave99@gmail.com	27/03/2023

Cancel Add Selected Recipients

Select Recipients Listview

Filters: --unfiltered--

Selected recipients: 0

Search: Type anywhere to search

DM Test

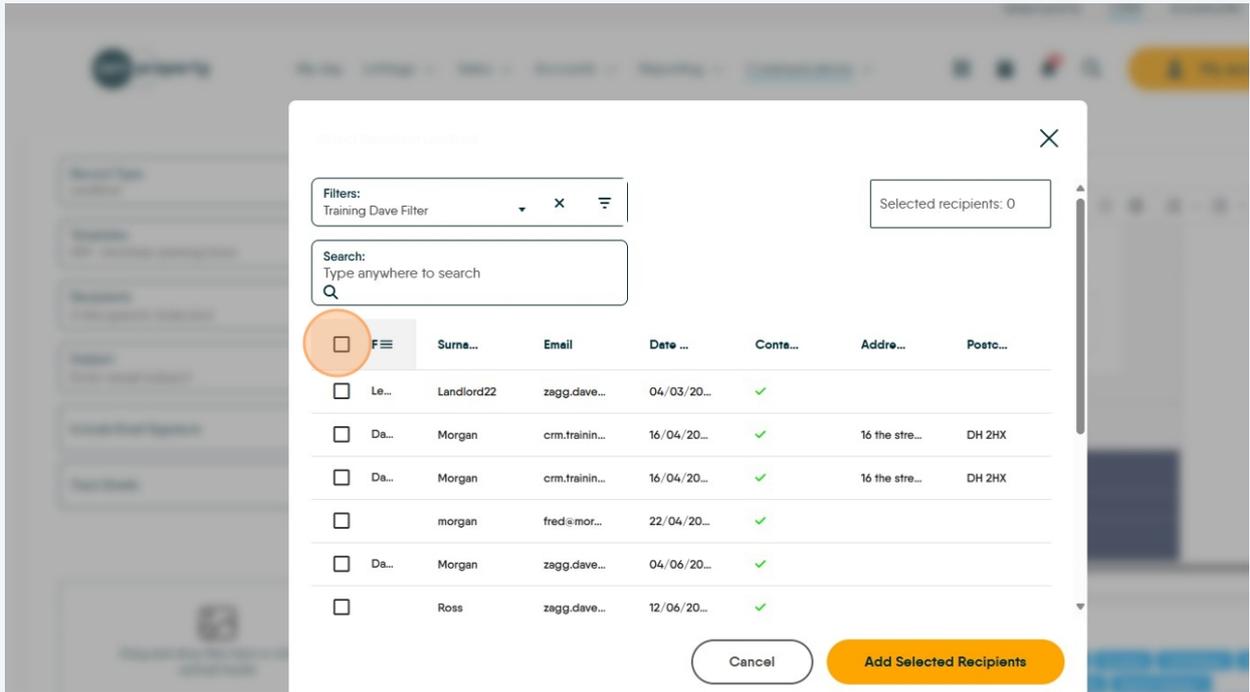
Training Dave Filter

landlord test

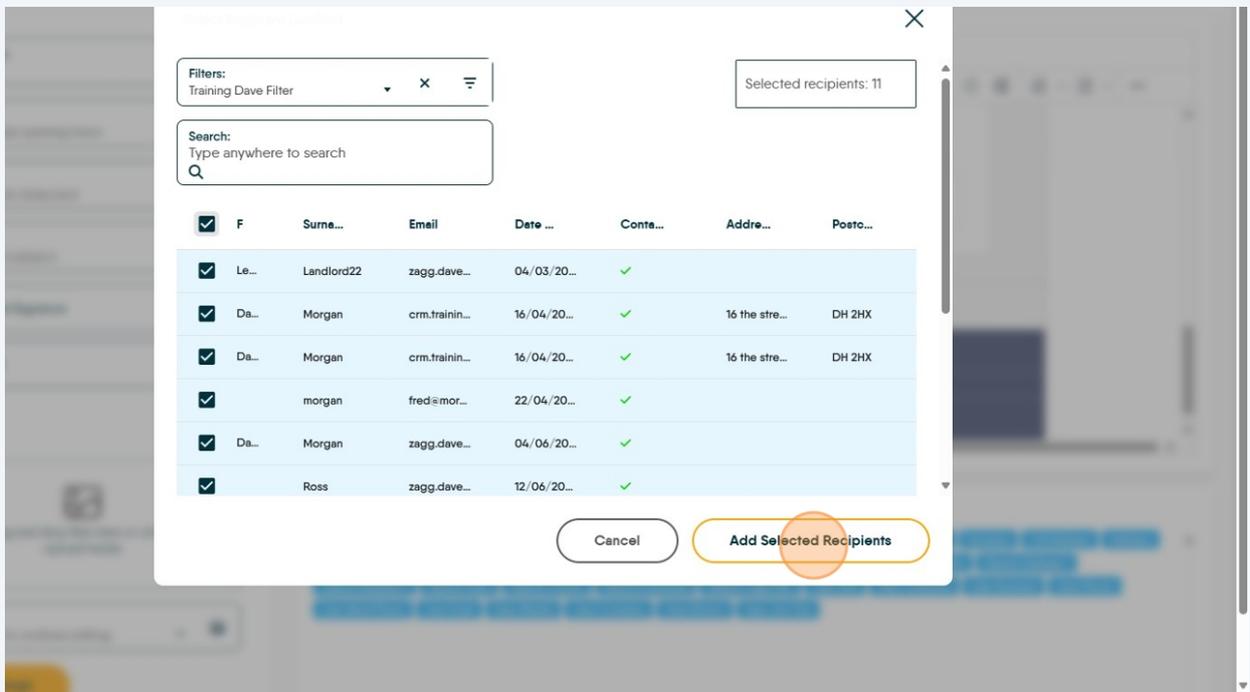
<input type="checkbox"/>	Forename	Surname	Email	Date Added
<input type="checkbox"/>	Eve	Harmon	zagg.dave@gmail.com	27/03/2023
<input type="checkbox"/>	Gandalf	Grey	zagg.dave@gmail.com	27/03/2023
<input type="checkbox"/>	Arthur	Morgan	zagg.dave@gmail.com	27/03/2023
<input type="checkbox"/>	Margaret	Morgan	dm@vtuk.com	27/03/2023
<input type="checkbox"/>	Mildred	Mallaby	zagg.dave99@gmail.com	27/03/2023

Cancel Add Selected Recipients

17 Click this checkbox to select all the recipients



18 Click "Add Selected Recipients"



19 Click the "Subject" field add the email subject.

The screenshot shows the 'iam property' email editor. On the left, the 'Subject' field is highlighted with an orange circle. The main editor area shows a preview of an email titled 'Christmas Opening Hours'. The preview includes a 'Read more' button and a footer with company information and links for Privacy Policy and Terms & Conditions. The 'Include Email Signature' toggle is currently turned off.

20 Click "Include Email Signature" if you want your email signature included.

The screenshot shows the 'iam property' email editor. The 'Include Email Signature' toggle is highlighted with an orange circle and is now turned on. The main editor area shows the same 'Christmas Opening Hours' email preview as in the previous screenshot. The 'Drafts' section at the bottom left now shows 'Select draft to continue editing'.

21 Click "Track Emails" to track emails for being sent and opened.

The screenshot shows an email editor interface. On the left, there is a sidebar with several settings: Record Type (Landlord), Templates (DM- christmas opening hours), Recipients (11 Recipients Selected), Subject (Enter email subject), Include Email Signature (checked), and Track Emails (unchecked). The 'Track Emails' toggle is highlighted with an orange circle. Below these settings is a media upload area and a 'Send Email' button. On the right, a preview of the email content is shown, including a 'Christmas Opening hours' header, a 'Read more' button, and a footer with company information and links to Privacy Policy and Terms & Conditions. A 'Template Tags' section at the bottom lists various variables like Company Name, Agreement Name, etc.

22 Click here to attach any additional documents

This screenshot is identical to the one above, but the 'Track Emails' toggle is now checked. In the media upload area, an orange circle highlights the 'Attach' icon (a document with a plus sign) next to the 'Drag and drop files here or click to upload media' text. The rest of the interface, including the sidebar settings and the email preview, remains the same.

23

Click "Select draft to continue editing" to select any drafts you may have created and not finished.

Record Type
Landlord

Templates
DM- christmas opening hours

Recipients
11 Recipients Selected

Subject
Enter email subject

Include Email Signature

Track Emails

Drag and drop files here or click to upload media

Drafts
Select draft to continue editing

Send Email

File Edit View Insert Format Tools Table

Christmas Opening hours

Please click below for our opening hours during the Christmas Period.

Read more -->

(Company Name) , (Branch Address 1) , (Branch Town) , (Branch Postcode)

[Privacy Policy](#) [Terms & Conditions](#)

Copyright © Year (Company Name)

Template Tags

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

Town Postcode Branch Name Branch Phone 1 Branch Phone 2 Branch Email Branch Fax Branch Property No Branch Address 1

Branch Address 2 Branch Town Branch Country Branch Postcode Branch Logo URL User Title User Forename User Surname User Phone

User Work Phone User Email User Mobile User Company User Branch User Job Title

24

Click "Send Email"

Record Type
Landlord

Templates
DM- christmas opening hours

Recipients
11 Recipients Selected

Subject
Enter email subject

Include Email Signature

Track Emails

Select draft to continue editing

DM Test

Test Draft

Drafts
Select draft to continue editing

Send Email

File Edit View Insert Format Tools Table

Christmas Opening hours

Please click below for our opening hours during the Christmas Period.

Read more -->

(Company Name) , (Branch Address 1) , (Branch Town) , (Branch Postcode)

[Privacy Policy](#) [Terms & Conditions](#)

Copyright © Year (Company Name)

Template Tags

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

Town Postcode Branch Name Branch Phone 1 Branch Phone 2 Branch Email Branch Fax Branch Property No Branch Address 1

Branch Address 2 Branch Town Branch Country Branch Postcode Branch Logo URL User Title User Forename User Surname User Phone

User Work Phone User Email User Mobile User Company User Branch User Job Title

Tracking Emails

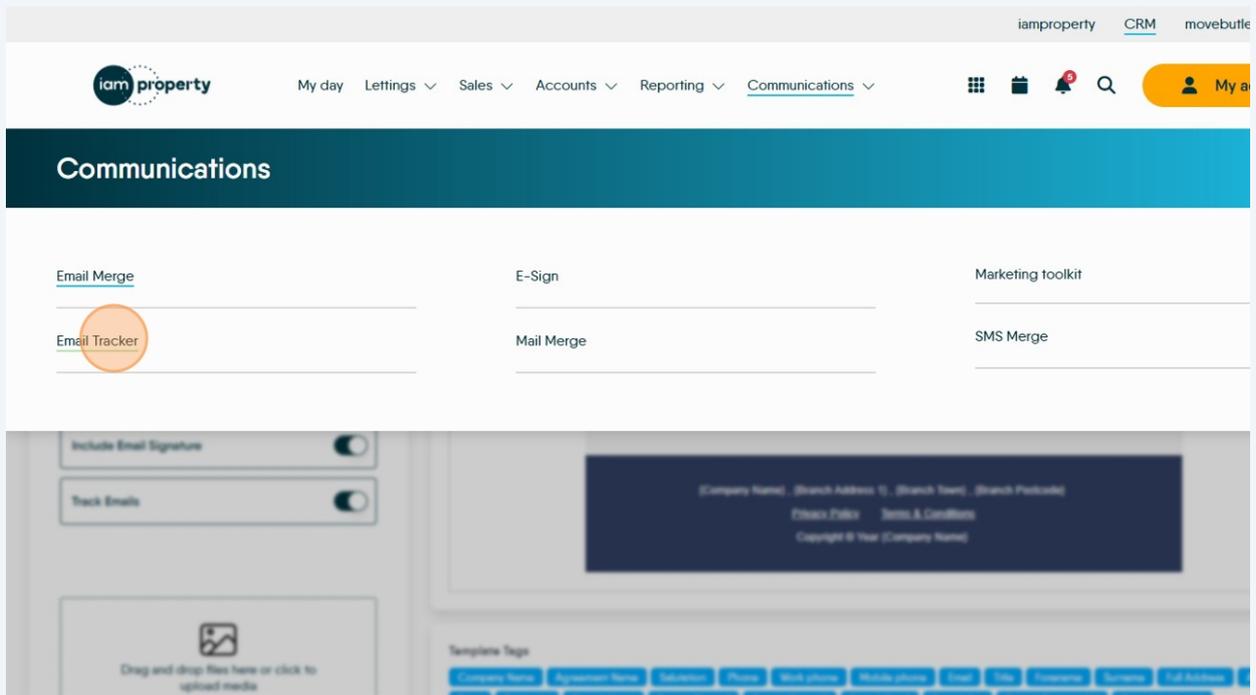


Alert! You need to have enabled the email tracking feature in the screen where you created the mass email.

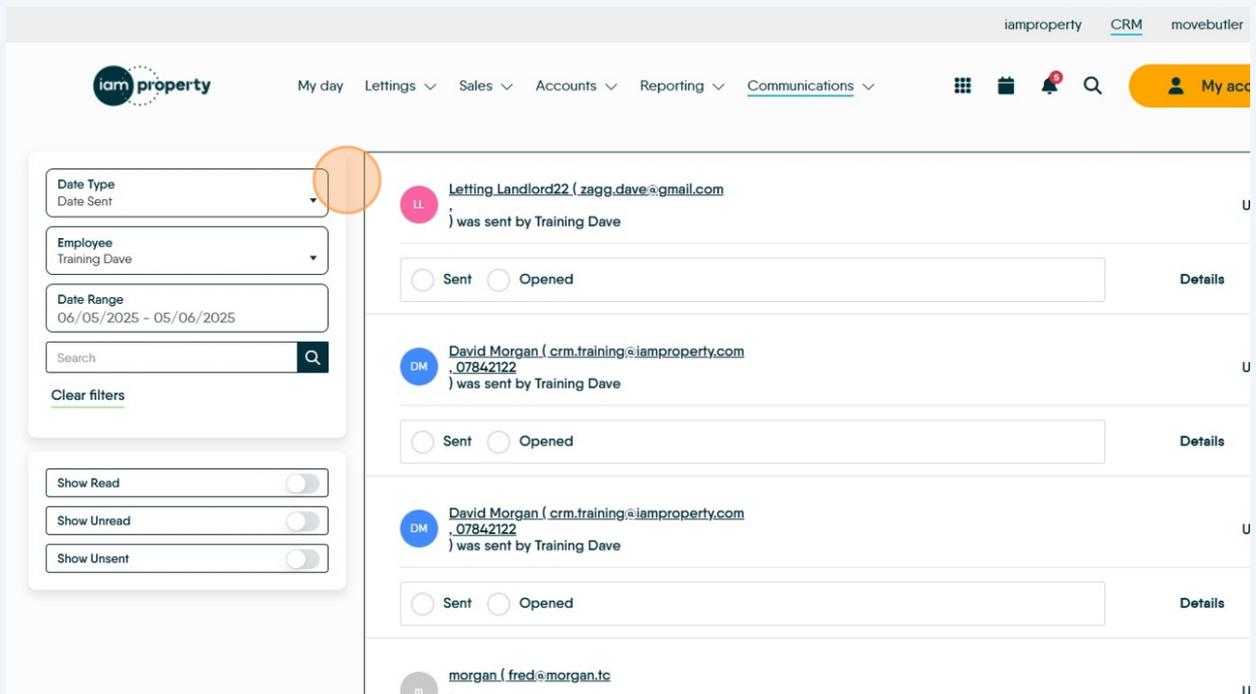
25 Click "Communications"

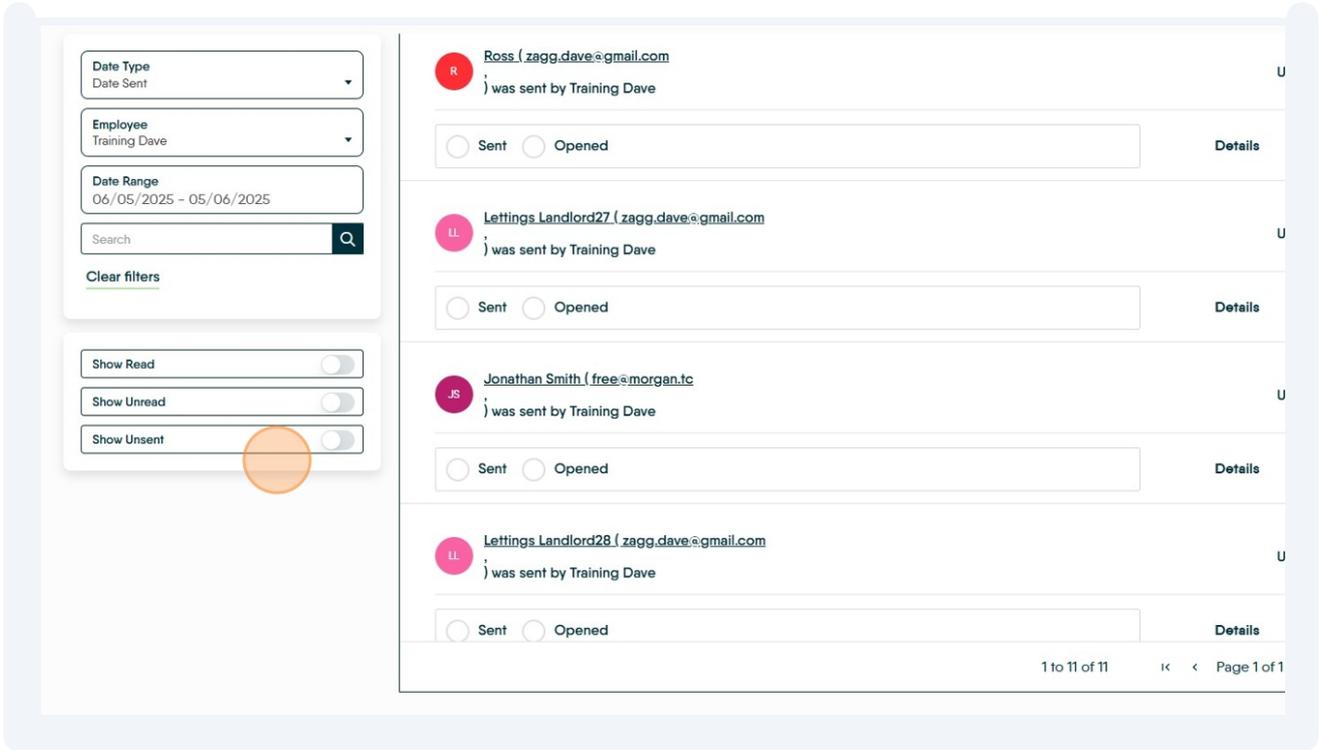
The screenshot displays the iamproperty CRM dashboard. The top navigation bar includes the iamproperty logo and several menu items: My day, Lettings, Sales, Accounts, Reporting, and Communications. The 'Communications' menu is highlighted with an orange circle. To the right of the navigation bar are icons for a grid, calendar, notifications, and search, along with a 'My account' button. The main content area features a rich text editor with a menu (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with various text formatting options. The editor contains a draft email titled 'Christmas opening hours' with the following text: 'Please click below for our opening hours during the Christmas Period.' and a 'Read more ->' button. Below the main text is a dark blue footer containing placeholder text: '(Company Name) , (Branch Address 1) , (Branch Town) , (Branch Postcode)', links for 'Privacy Policy' and 'Terms & Conditions', and 'Copyright © Year (Company Name)'. At the bottom of the editor, there is a 'Template Tags' section with a list of tags: Company Name, Agreement Name, Salutation, Phone, Work phone, Mobile phone, Email, Title, Forename, Surname, Full Address, and Address.

26 Click "Email Tracker"



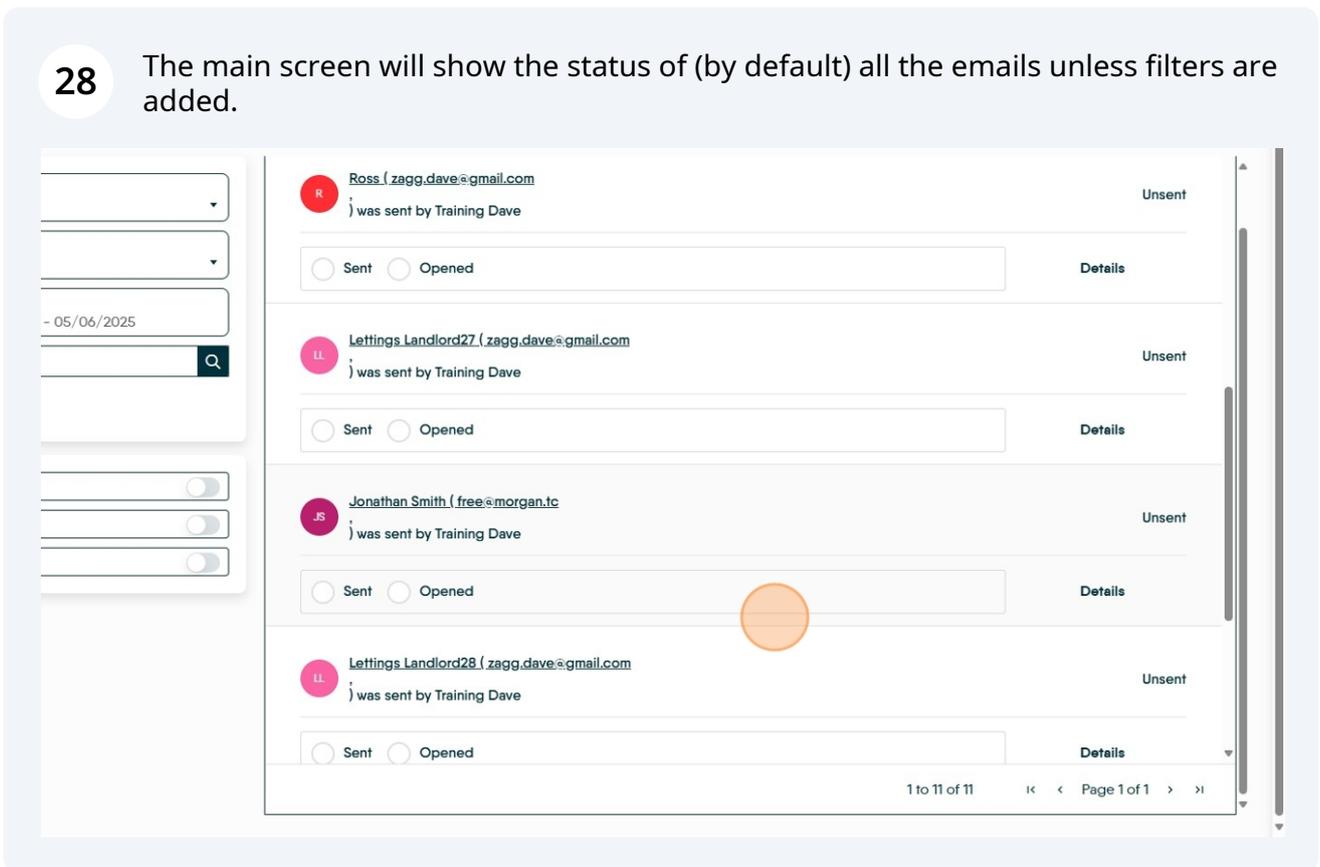
27 Click here there are options to sort the email list and opt to show only a specific type of message
Click here.





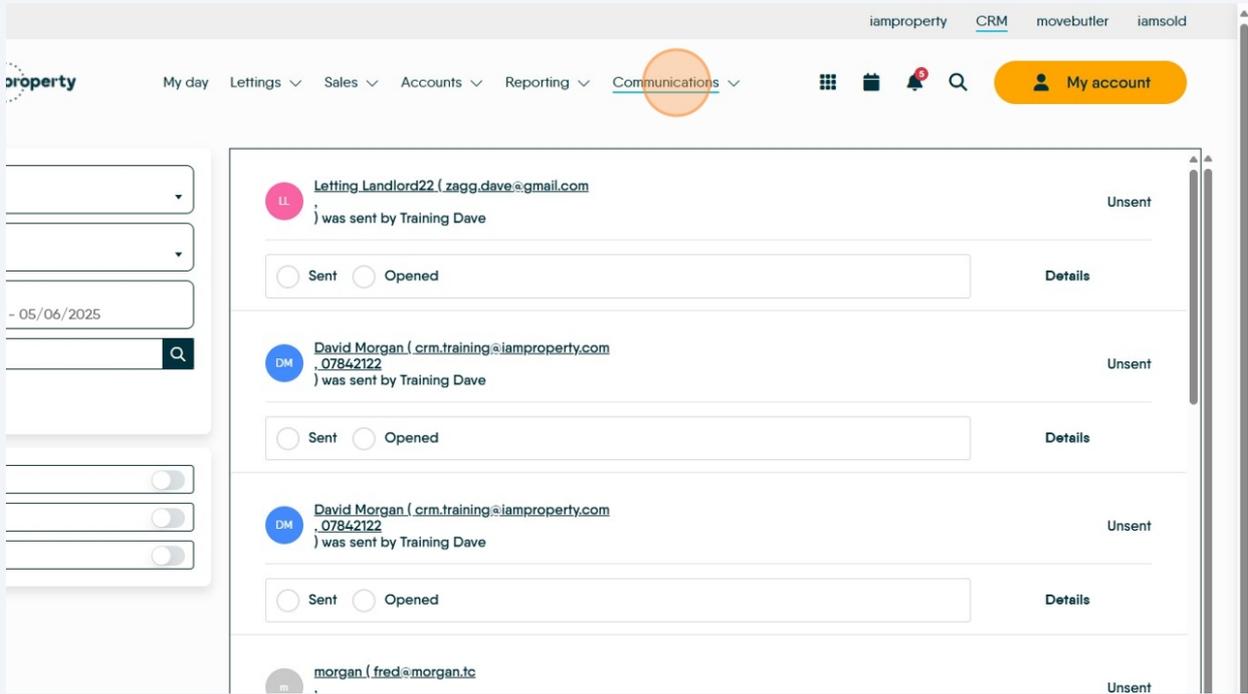
28

The main screen will show the status of (by default) all the emails unless filters are added.

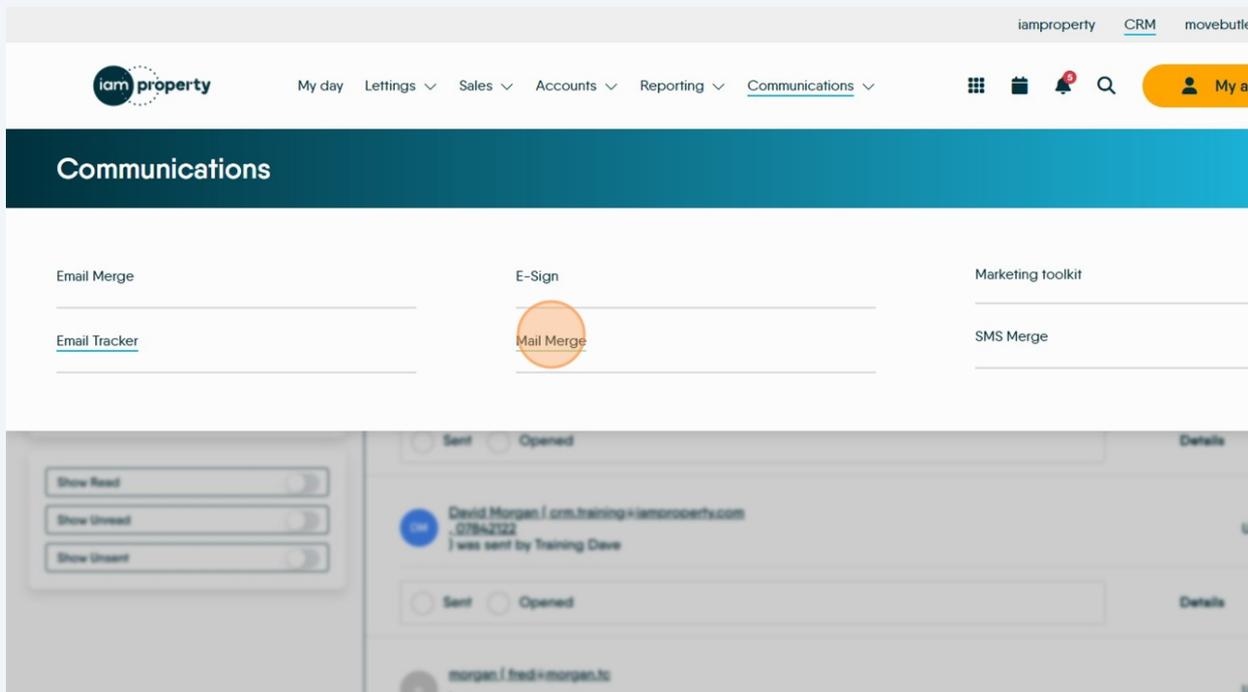


Letter Merge

29 Click "Communications"



30 Click "Mail Merge"



31 Click "Select record type"

The screenshot shows the 'Generated letters' interface in the 'iam property' CRM. On the left, there are five configuration fields: 'Record Type' (with a dropdown arrow and a red asterisk), 'Letters' (with a dropdown arrow and a red asterisk), 'Recipients' (0 Recipients Selected), 'Email Templates' (with a dropdown arrow), and 'Email Subject' (Enter email subject). The 'Record Type' dropdown is highlighted with an orange circle. The main area is titled 'Generated letters' and contains a search bar with the placeholder 'Search: Type anywhere to search'. Below the search bar is a table with columns: File Ty..., File N..., Reci..., Reci..., Date ..., Email ..., Status, and D. The table is currently empty, displaying 'No Rows To Show'. At the bottom, there are several action buttons: Refresh, Save to Documents, Send Email, Download selected, and Clear Selected (highlighted with a red border). The page footer shows '0 to 0 of 0' and 'Page 0 of 0'.

32 Click here. As an example we will use Contractors.

The screenshot shows the 'Generated letters' interface with the 'Record Type' dropdown menu open. The dropdown menu lists the following options: 'Select record type', 'Landlord', 'Tenant', 'Contractor' (highlighted with an orange circle), 'Vendor', and 'Letting Applicant'. The main area is the same as in the previous screenshot, showing the search bar, the empty table with 'No Rows To Show', and the action buttons at the bottom.

33 Click "Contractor"

The screenshot shows the 'Generated letters' interface in the 'iamproperty' CRM. On the left, a 'Record Type' dropdown menu is open, showing options: Landlord, Tenant, Contractor (highlighted with an orange circle), Vendor, Lettings Applicant, and Sales Applicant. The main area displays a table with columns: File Ty..., File N..., Reci..., Reci..., Date ..., Email ..., Status, and D. The table is currently empty, showing 'No Rows To Show'. At the bottom, there are buttons for Refresh, Save to Documents, Send Email, Download selected, and Clear Selected. A search bar is located at the top right of the table area.

34 Click "Select letter template" There are no default letter templates, you will need to create your own. This is done by adding a Letter in config and marking it as 'Mass'

The screenshot shows the 'Generated letters' interface in the 'iamproperty' CRM. On the left, the 'Record Type' dropdown is set to 'Contractor'. Below it, the 'Letters' dropdown menu is open, showing 'Select letter template' (highlighted with an orange circle). Other fields include 'Recipients' (0 Recipients Selected), 'Email Templates' (Select email template), and 'Email Subject' (Enter email subject). The main area displays the same empty table as in the previous screenshot, with 'No Rows To Show' and the same set of buttons at the bottom.

35

Select your letter template from the list in this example we are using "Mail Merge Test"

The screenshot shows the 'iam property' interface. On the left, there are several form fields: 'Record Type' (Landlord), 'Letters' (Select letter template), 'Email Subject' (Enter email subject), and 'Recipients' (0 Recipients Selected). The 'Letters' dropdown menu is open, showing a list of templates with 'Mail Merge Test' highlighted. Below the form fields is the 'Generated letters' section. It features a search bar, a table with columns for 'File Ty...', 'File N...', 'Reci...', 'Reci...', 'Date ...', 'Email ...', 'Status', and 'D'. The table is currently empty, displaying 'No Rows To Show'. At the bottom of the table, there are buttons for 'Refresh', 'Save to Documents', 'Send Email', 'Download selected', and 'Clear Selected'.

36

Click "Select email template"

The screenshot shows the 'iam property' interface. On the left, there are several form fields: 'Record Type' (Landlord), 'Letters' (Mail Merge Test), 'Email Subject' (Enter email subject), and 'Recipients' (0 Recipients Selected). The 'Email Templates' dropdown menu is open, showing a list of templates with 'Select email template' highlighted. Below the form fields is the 'Generated letters' section. It features a search bar, a table with columns for 'File Ty...', 'File N...', 'Reci...', 'Reci...', 'Date ...', 'Email ...', 'Status', and 'D'. The table is currently empty, displaying 'No Rows To Show'. At the bottom of the table, there are buttons for 'Refresh', 'Save to Documents', 'Send Email', 'Download selected', and 'Clear Selected'.

37

For this example we Click "Demo Template" you will need to add your own templates.

Record Type
Landlord

Letters
Mail Merge Test

Recipients
0 Recipients Selected

Email Templates
Select email template

Select email template

Demo Template

DM- christmas opening hours

Generate PDF

Generate Word

Generated letters

Search:
Type anywhere to search

File Ty... File N... Reci... Reci... Date ... Email ... Status D

No Rows To Show

0 to 0 of 0 Page 0 of 0

Refresh Save to Documents Send Email Download selected Clear Selected

38

Click the "Email Subject" field and add the subject of your email.

Record Type
Landlord

Letters
Mail Merge Test

Recipients
0 Recipients Selected

Email Templates
Demo Template

Email Subject
Enter email subject

Generate PDF

Generate Word

Generated letters

Search:
Type anywhere to search

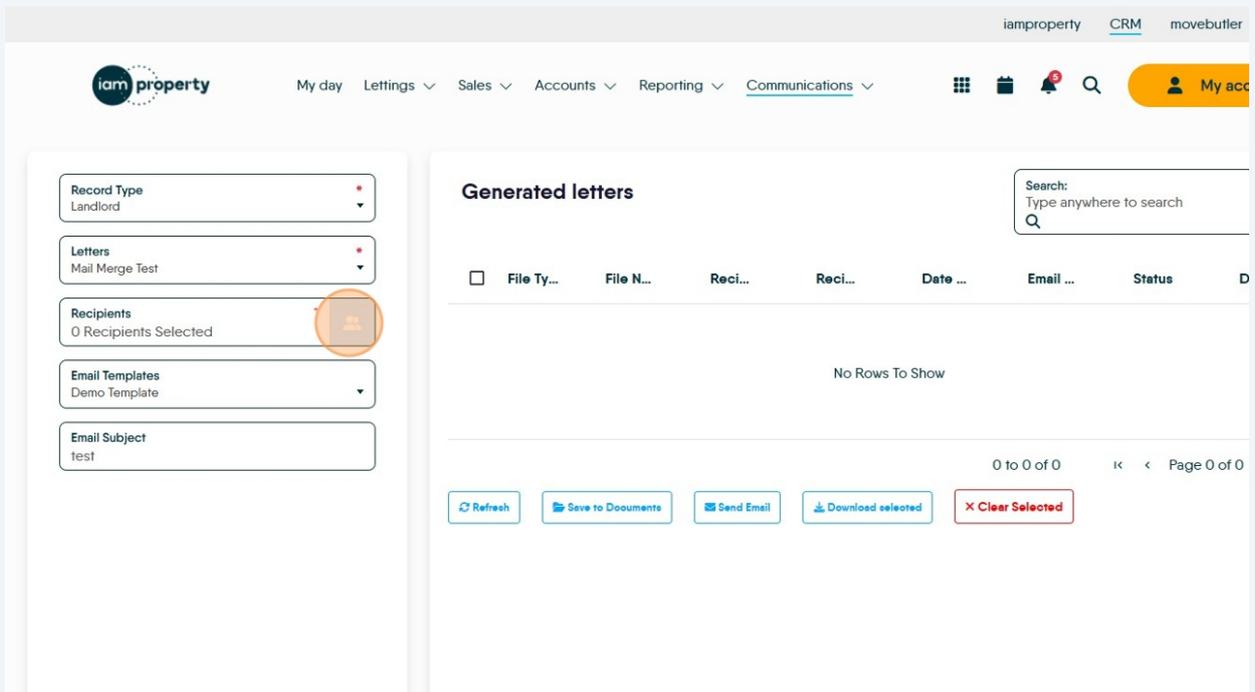
File Ty... File N... Reci... Reci... Date ... Email ... Status D

No Rows To Show

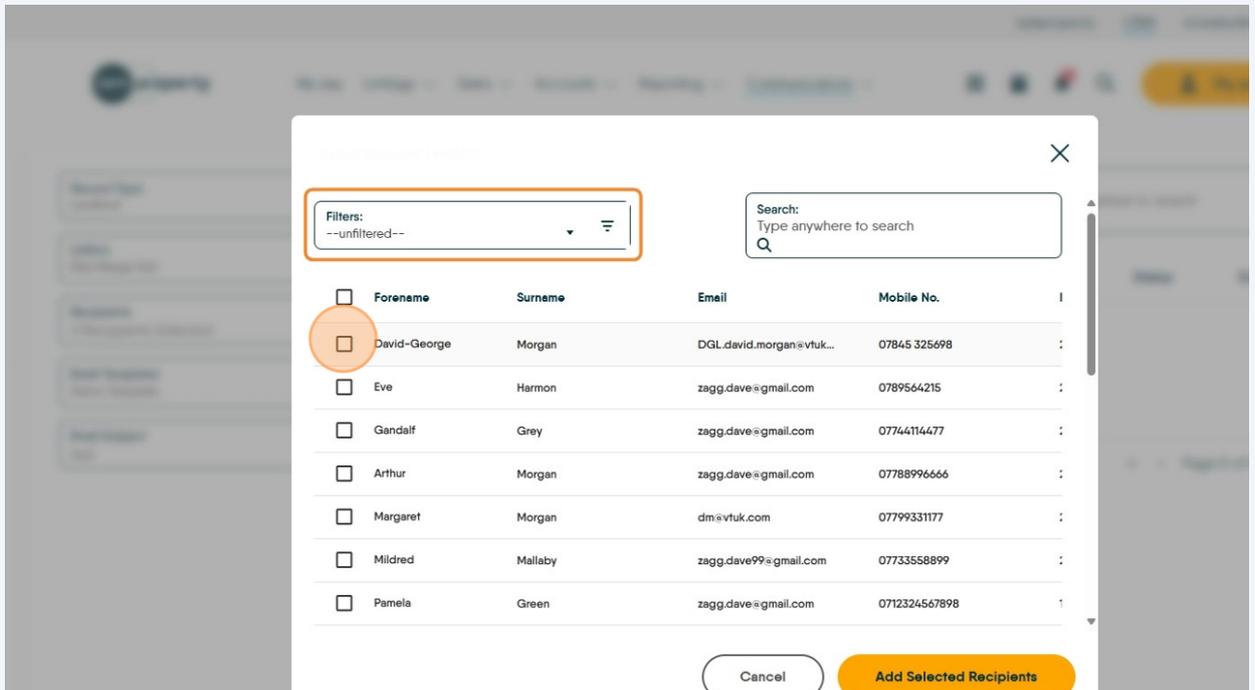
0 to 0 of 0 Page 0 of 0

Refresh Save to Documents Send Email Download selected Clear Selected

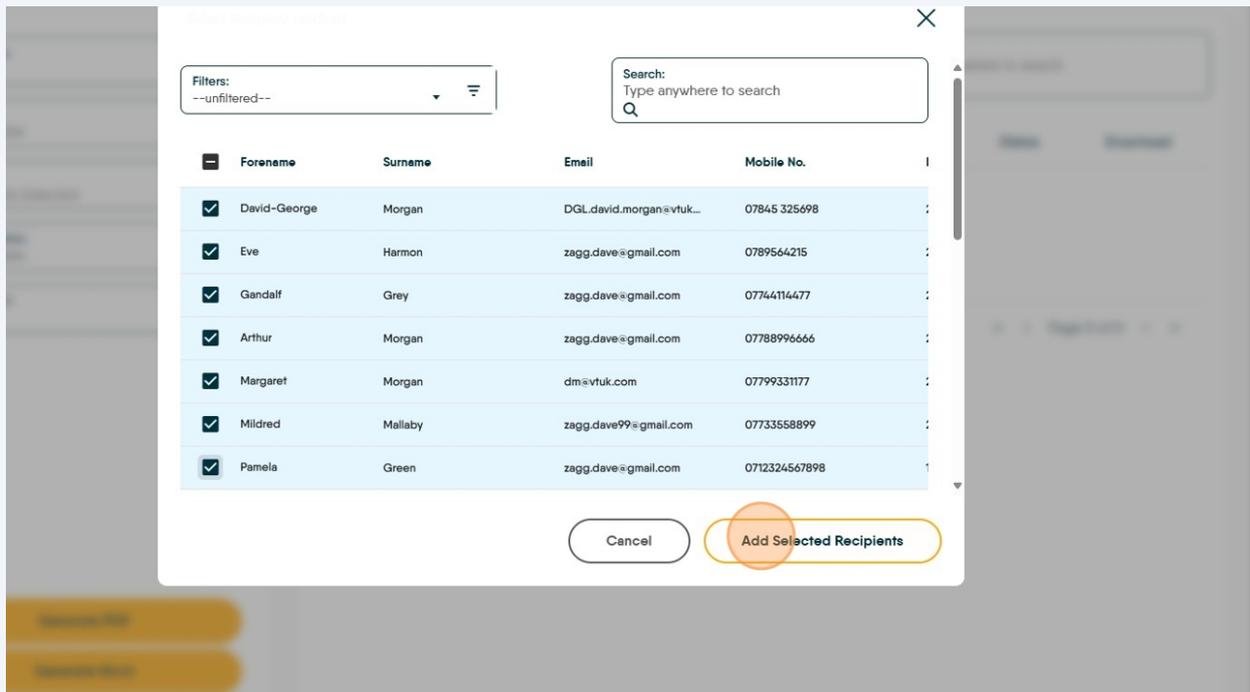
39 Click here.



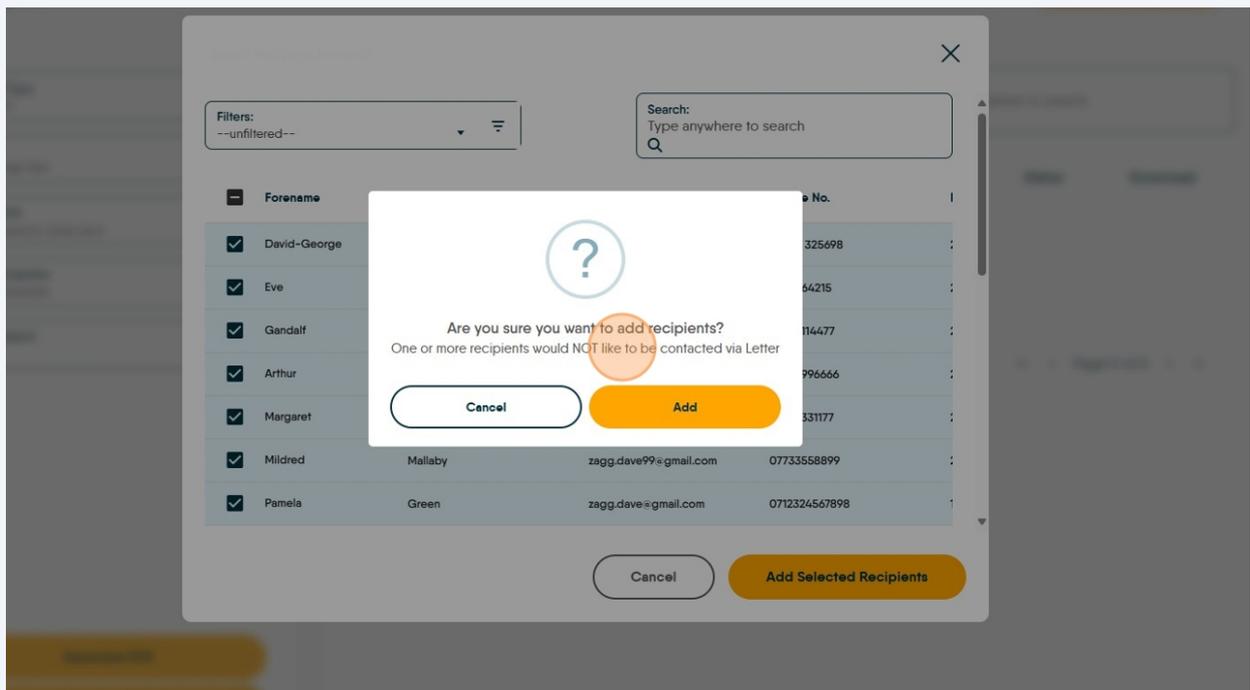
40 Click this checkbox to select an individual user or click the check box at the top (next to Forename) to select all in the list. As with other options the recipient list can be filtered using the filters option.

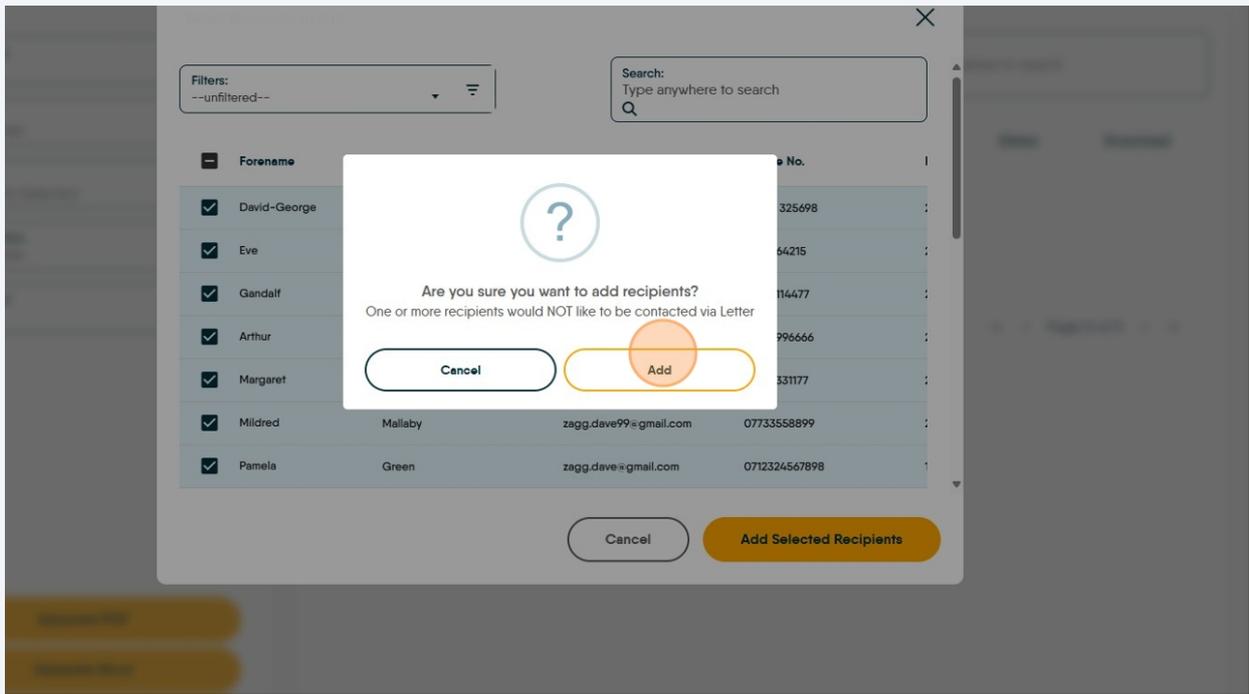


41 Click "Add Selected Recipients"



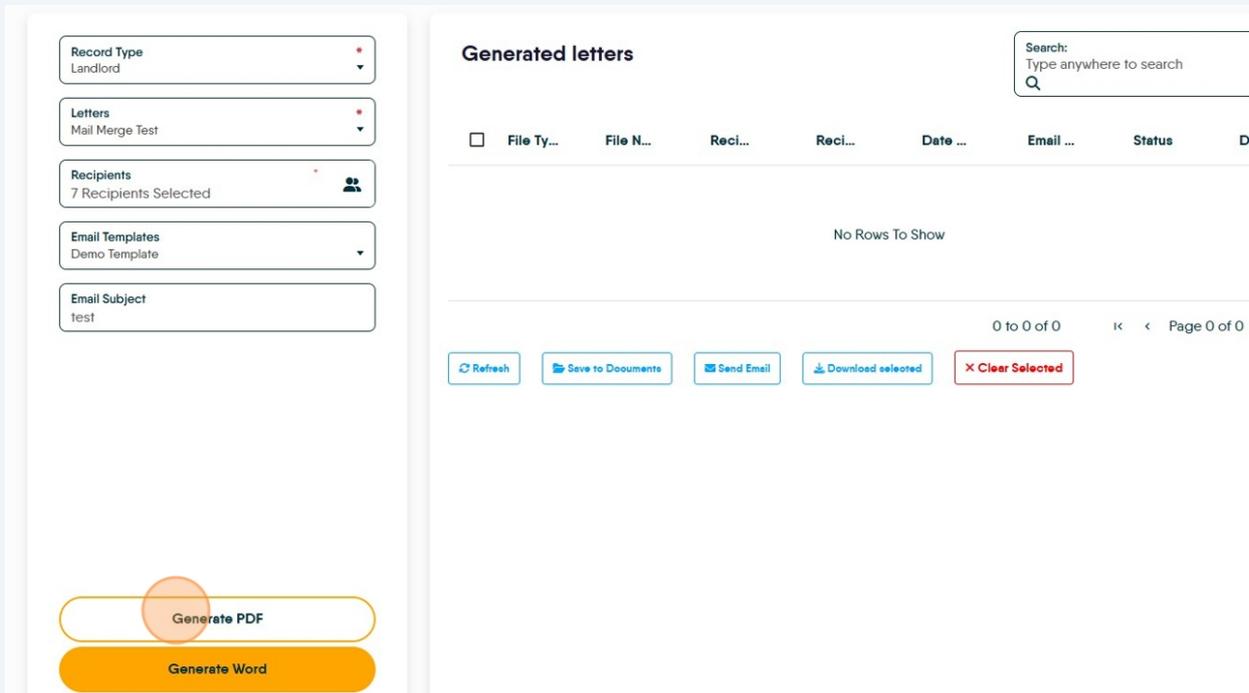
42 If there is a recipient whose GDPR is set to not want contact, in this case via letter, you will see this warning. If you click add they will be added to the mail merge. If 'cancel' is clicked then you will return to the recipient screen where they can be removed from the list. Click "One or more recipients would NOT like to be contacted via Letter"
Click "Add"





43

Click "Generate PDF" to generate the individual letter as a PDF
Click here.



Type

Test

Patients Selected

Templates

Subject

Generate PDF

Generate Word

Generated letters

Search: Type anywhere to search

<input type="checkbox"/>	File Ty...	File N...	Reci...	Reci...	Date ...	Email ...	Status	Download
<input type="checkbox"/>	PDF	MassLe...	David-...		05/06/...		✓ Lette...	Download
<input type="checkbox"/>	PDF	MassLe...	Eve		05/06/...		✓ Lette...	Download
<input type="checkbox"/>	PDF	MassLe...	Gandalf		05/06/...		✓ Lette...	Download
<input type="checkbox"/>	PDF	MassLe...	Arthur		05/06/...		✓ Lette...	Download
<input type="checkbox"/>	PDF	MassLe...	Margaret		05/06/...		✓ Lette...	Download
<input type="checkbox"/>	PDF	MassLe...	Mildred		05/06/...		✓ Lette...	Download
<input type="checkbox"/>	PDF	MassLe...	Pamela		05/06/...		✓ Lette...	Download

1 to 7 of 7 Page 1 of 1

[Refresh](#)
[Save to Documents](#)
[Send Email](#)
[Download selected](#)
[X Clear Selected](#)

44 Click "Send Email"

Type

Test

Patients Selected

Templates

Subject

Generate PDF

Generate Word

Generated letters

Search: Type anywhere to search

<input type="checkbox"/>	File Ty...	File N...	Reci...	Reci...	Date ...	Email ...	Status	Download
<input type="checkbox"/>	PDF	MassLe...	David-...		05/06/...		✓ Lette...	Download
<input type="checkbox"/>	PDF	MassLe...	Eve		05/06/...		✓ Lette...	Download
<input type="checkbox"/>	PDF	MassLe...	Gandalf		05/06/...		✓ Lette...	Download
<input type="checkbox"/>	PDF	MassLe...	Arthur		05/06/...		✓ Lette...	Download
<input type="checkbox"/>	PDF	MassLe...	Margaret		05/06/...		✓ Lette...	Download
<input type="checkbox"/>	PDF	MassLe...	Mildred		05/06/...		✓ Lette...	Download
<input type="checkbox"/>	PDF	MassLe...	Pamela		05/06/...		✓ Lette...	Download

1 to 7 of 7 Page 1 of 1

[Refresh](#)
[Save to Documents](#)
[Send Email](#)
[Download selected](#)
[X Clear Selected](#)

45 Make sure you have selected the recipients before clicking send email.

The screenshot shows the 'Generated letters' interface. On the left, there are filters for Record Type (Landlord), Letters (Mail Merge Test), Recipients (7 Recipients Selected), Email Templates (Demo Template), and Email Subject (test). The main area displays a table of generated letters with columns: File Ty..., File N..., Reci..., Reci..., Date ..., Email ..., Status, and Download. The table contains 7 rows, each with a PDF icon, 'MassLe...', a name (David..., Eve, Gandalf, Arthur, Margaret, Mildred, Pamela), '05/06/...', 'Lette...', and a download icon. An orange callout box with the text 'Or you will see this message!' points to the 'Send Email' button. A red error message box in the top right corner says 'Oops... Select at least one merged letter'.

46 Click "Send Email"

The screenshot shows the 'Generated letters' interface with all checkboxes in the first column of the table selected. The 'Send Email' button at the bottom is highlighted with an orange circle. A tooltip above the button says 'Send e-mail to each selected records with letters in attachment'. The error message from the previous screenshot is no longer present.

SMS Merge



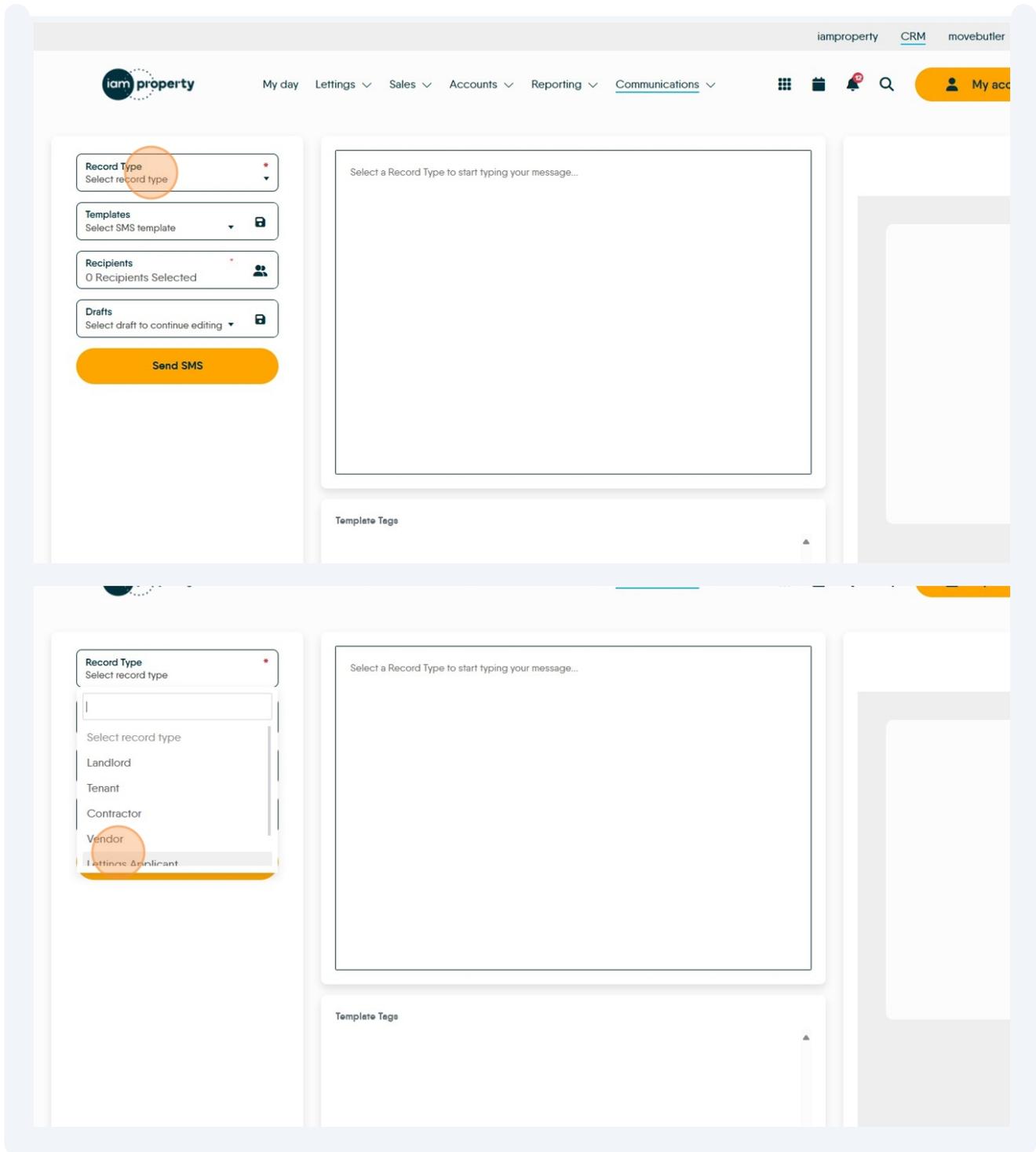
Alert! A SMS is limited to 160 characters per message, if you go over this limit you will send and be charged (by your selected provider) for 2 messages

47 Click "SMS Merge"

The screenshot shows a CRM interface with a top navigation bar containing 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. A secondary navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Communications' section is active, displaying options like 'E-Sign', 'Mail Merge', 'Marketing toolkit', and 'SMS Merge' (highlighted with an orange circle). A 'New' button is visible next to 'Marketing toolkit'. Below the main interface, a 'My tasks' table is shown with the following data:

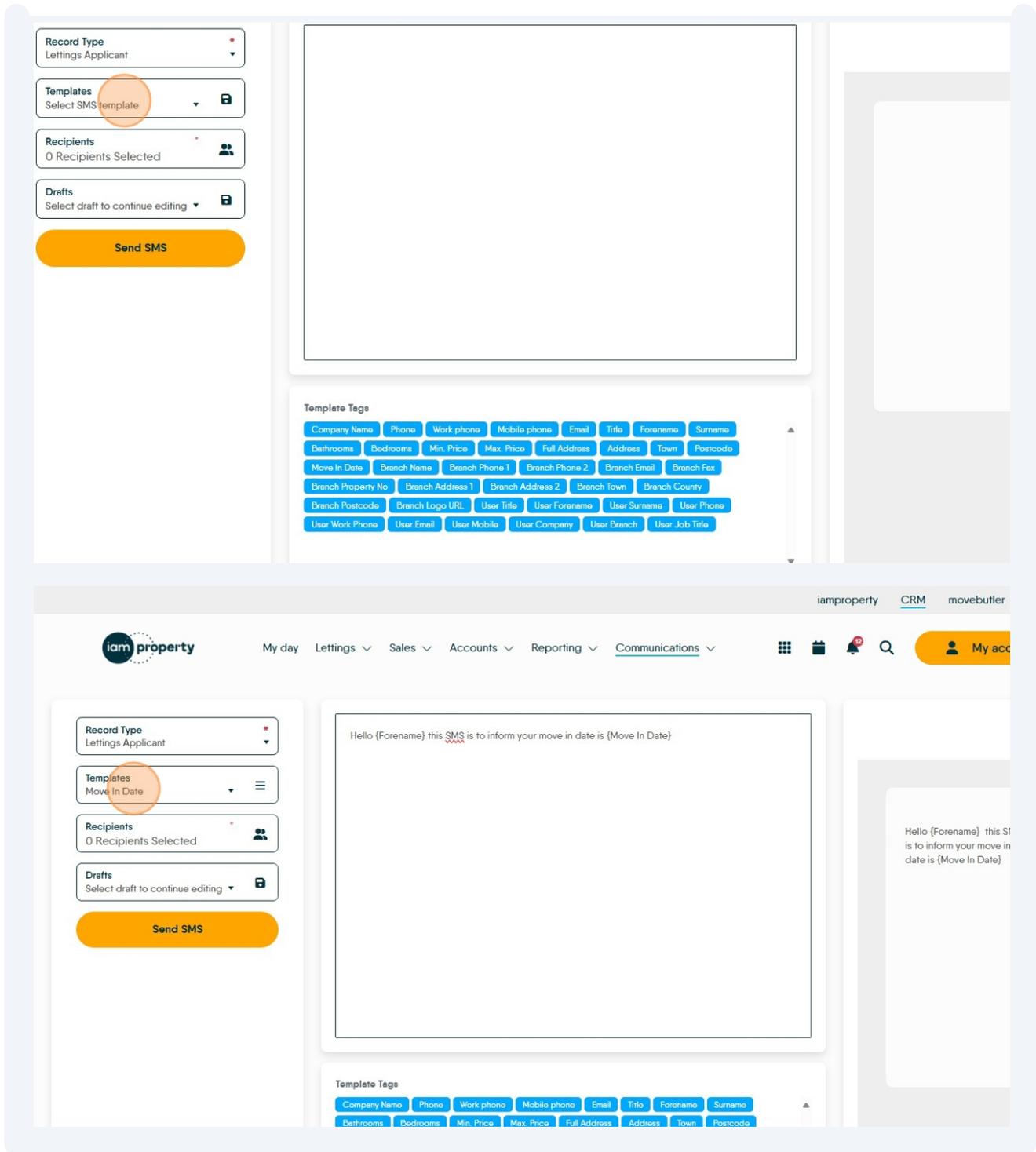
Status	Name	Priority	Start date	Due date
<input type="checkbox"/> Not Started	Contact Landlord re renewal	High	12/Jan/2025	14/Jan/2025
<input type="checkbox"/> Not Started	Call back	High	03/Jan/2025	03/Jan/2025
<input type="checkbox"/> Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

48 Click "Select record type" and select the record type you are sending the SMS to. For this example we are using Lettings Applicant.



49

Click "Select SMS template" and select the template you want to use, or if there are no templates create your own in the message field. In this example we have selected "Move In Date" template.



50

Click "Move In Date" a preview of your message will show on the right side of the screen.

Record Type
Lettings Applicant

Templates
Move In Date

Select SMS template

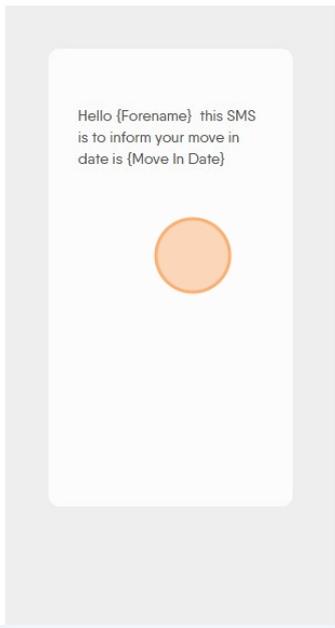
Move In Date

Send SMS

Hello {Forename} this SMS is to inform your move in date is {Move In Date}

- Template Tags**
- Company Name
 - Phone
 - Work phone
 - Mobile phone
 - Email
 - Title
 - Forename
 - Surname
 - Bathrooms
 - Bedrooms
 - Min. Price
 - Max. Price
 - Full Address
 - Address
 - Town
 - Postcode
 - Move In Date
 - 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

Hello {Forename} this SMS is to inform your move in date is {Move In Date}



- Template Tags**
- Company Name
 - Phone
 - Work phone
 - Mobile phone
 - Email
 - Title
 - Forename
 - Surname
 - Bathrooms
 - Bedrooms
 - Min. Price
 - Max. Price
 - Full Address
 - Address
 - Town
 - Postcode
 - Move In Date
 - 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

51 Click here to select your recipients

Record Type
Lettings Applicant

Templates
Move In Date

Recipients
0 Recipients Selected

Drafts
Select draft to continue editing

Send SMS

Hello (Forename) this SMS is to inform your move in date is (Move In Date)

Template Tags
Company Name Phone Work phone Mobile phone Email Title Forename Surname
Bathrooms Bedrooms Min. Price Max. Price Full Address Address Town Postcode

52 Click "Filters:" to filter the contact list as required, or select a pre created filter.

Select Recipients - Lettings Applicant

Filters: --unfiltered--

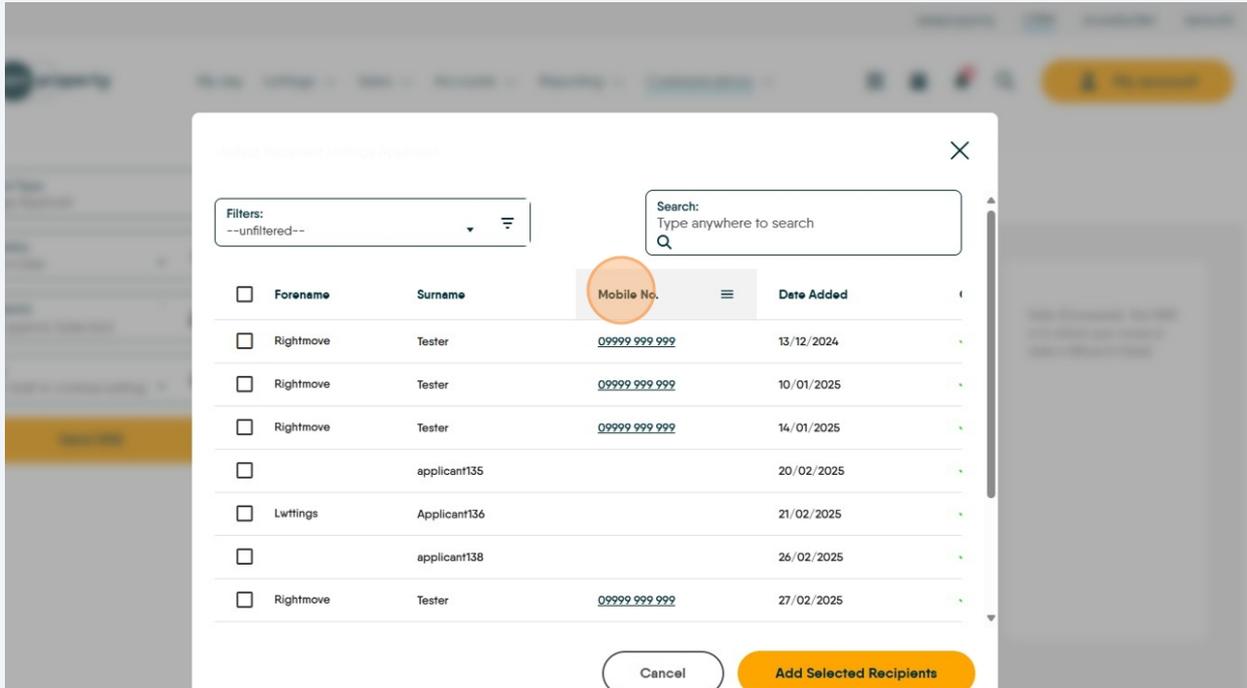
Search: Type anywhere to search

<input type="checkbox"/>	Forename	Surname	Mobile No.	Date Added
<input type="checkbox"/>	Rightmove	Tester	09999 999 999	13/12/2024
<input type="checkbox"/>	Rightmove	Tester	09999 999 999	10/01/2025
<input type="checkbox"/>	Rightmove	Tester	09999 999 999	14/01/2025
<input type="checkbox"/>		applicant135		20/02/2025
<input type="checkbox"/>	Lwtings	Applicant136		21/02/2025
<input type="checkbox"/>		applicant138		26/02/2025
<input type="checkbox"/>	Rightmove	Tester	09999 999 999	27/02/2025

Cancel Add Selected Recipients

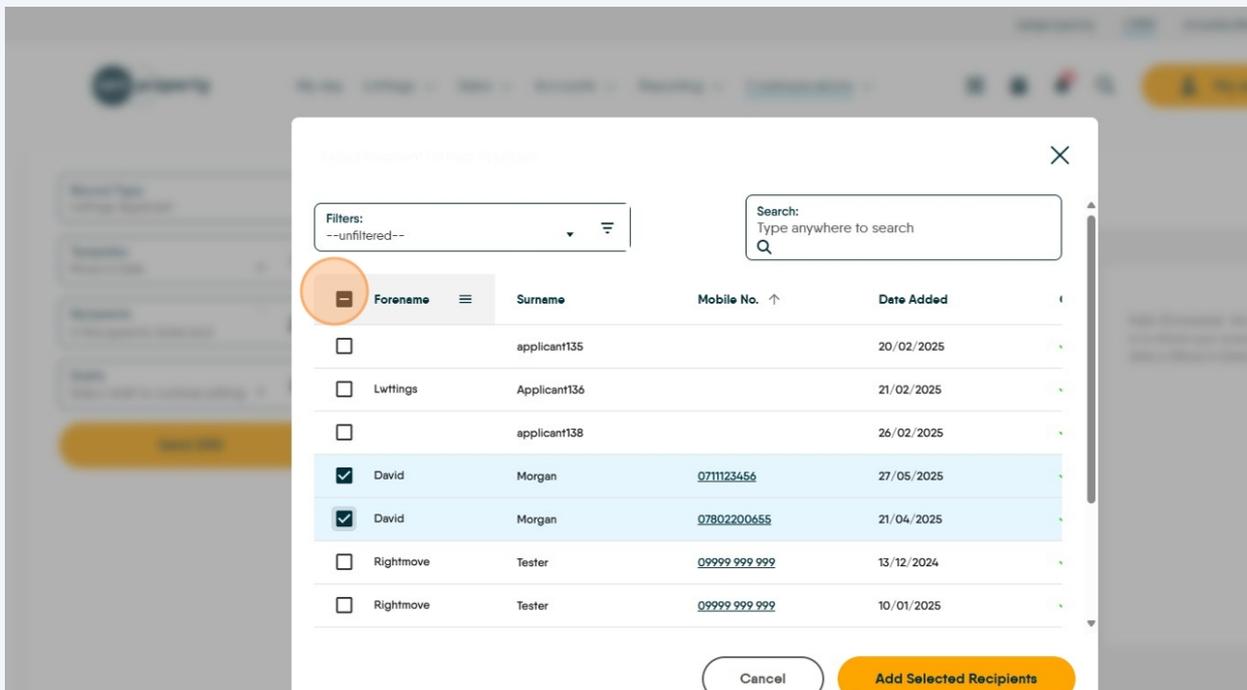
53

you can sort the list by clicking on the column headers (this is the same for all the other options) For example click "Mobile No." and this will sort the mobile numbers into ascending or descending order.



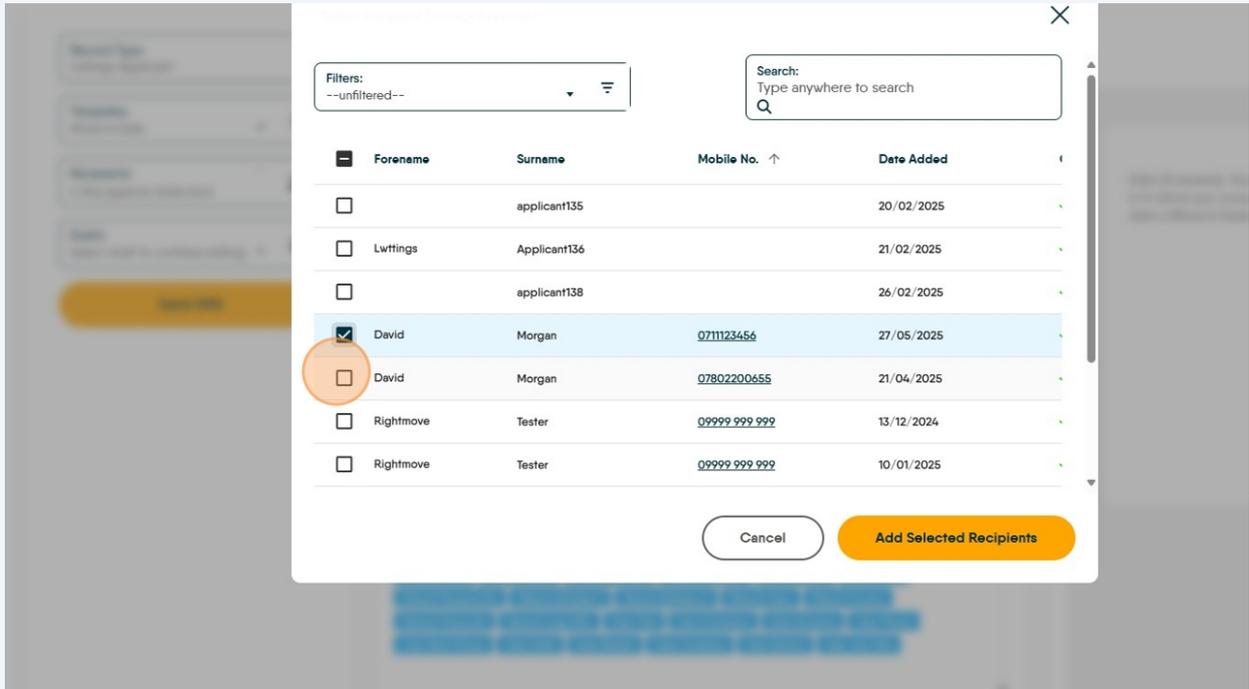
54

Click this checkbox. To select all contacts



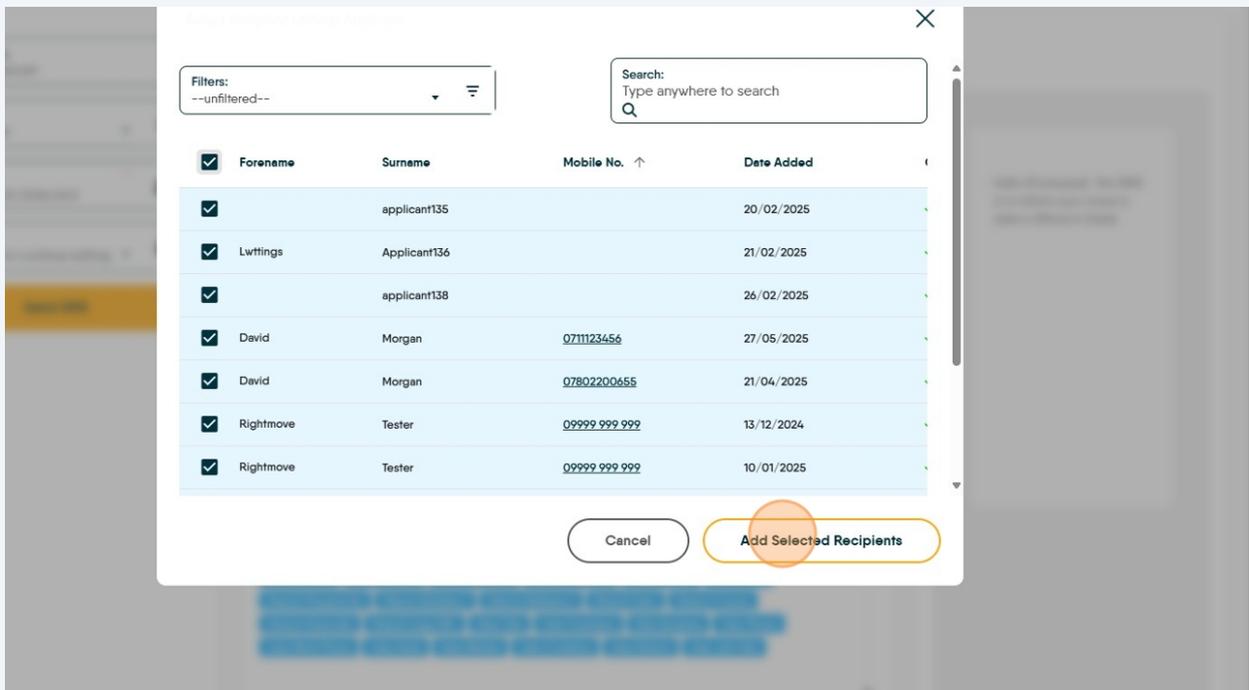
55

Click this checkbox to select an individual record, it will also de-select a previously selected record.



56

Click "Add Selected Recipients"



57 Click "Send SMS" and your message will be sent.

The screenshot displays an SMS sending interface. On the left, there are several control panels: 'Record Type' set to 'Lettings Applicant', 'Templates' set to 'Move In Date', 'Recipients' showing '9 Recipients Selected', and 'Drafts' with 'Select draft to continue editing'. A prominent orange 'Send SMS' button is located below these panels. The central area contains a message template: 'Hello {Forename} this SMS is to inform your move in date is {Move In Date}'. Below the template is a 'Template Tags' section with a scrollable list of tags such as 'Company Name', 'Phone', 'Work phone', 'Mobile phone', 'Email', 'Title', 'Forename', 'Surname', 'Bathrooms', 'Bedrooms', 'Min. Price', 'Max. Price', 'Full Address', 'Address', 'Town', 'Postcode', 'Move In Date', '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 Branch', and 'User Job Title'. On the right, a preview of the SMS shows the rendered message: 'Hello this SMS is to info your move in date is 20/02/2025 00:00:00'.