

Sending an Appraisal Confirmation Email



This guide simplifies the process of sending an appraisal confirmation email, ensuring you communicate effectively and professionally with clients.

It provides step-by-step instructions to navigate the CRM platform, choose the appropriate template, and personalise the message. By following these steps, you can save time and enhance client relationships through clear communication.



Alert! Your company may already have an automation that performs this process for you, if you are unsure please check with your Management before sending the message from here. If there is an automation in place, you can use this process to send a reminder out if you wanted.

1

Navigate to the calendar entry for the appraisal or if you have just created the appraisal click 'Save Appraisal' before trying to send the confirmation.

A screenshot of a mobile application interface showing the 'Edit Appraisal' form. The form has a title bar with a close button (X) and three tabs: 'Details', 'Appointment', and 'Appraisal'. The 'Details' tab is active. It contains two main sections: 'Select Property' and 'Select a Vendor'. The 'Select Property' section shows a dropdown menu with '162 Yew Tree Close, Hurworth, Darlin...' selected. Below this, the address '162 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK' is displayed, along with a blue arrow icon. The 'Select a Vendor' section shows a dropdown menu with 'Mr Alfie Martin' selected. Below this, the vendor's details 'Select a Vendor, Phone: 078554622, zagg.dave@gmail.com' are shown, along with icons for phone, message, and email. At the bottom of the form, there is a 'Values' section with a dropdown menu showing 'James Morgan' and a close button (X). At the very bottom, there are two buttons: 'Cancel' and 'Save Appraisal'.

2 Click here.

Edit Appraisal

Details Appointment Appraisal

Select Property
162 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK

Select a Vendor
Mr Alfie Martin

Select a Vendor
Phone: 078554622
zagg.dave@gmail.com

Valuers
James Morgan

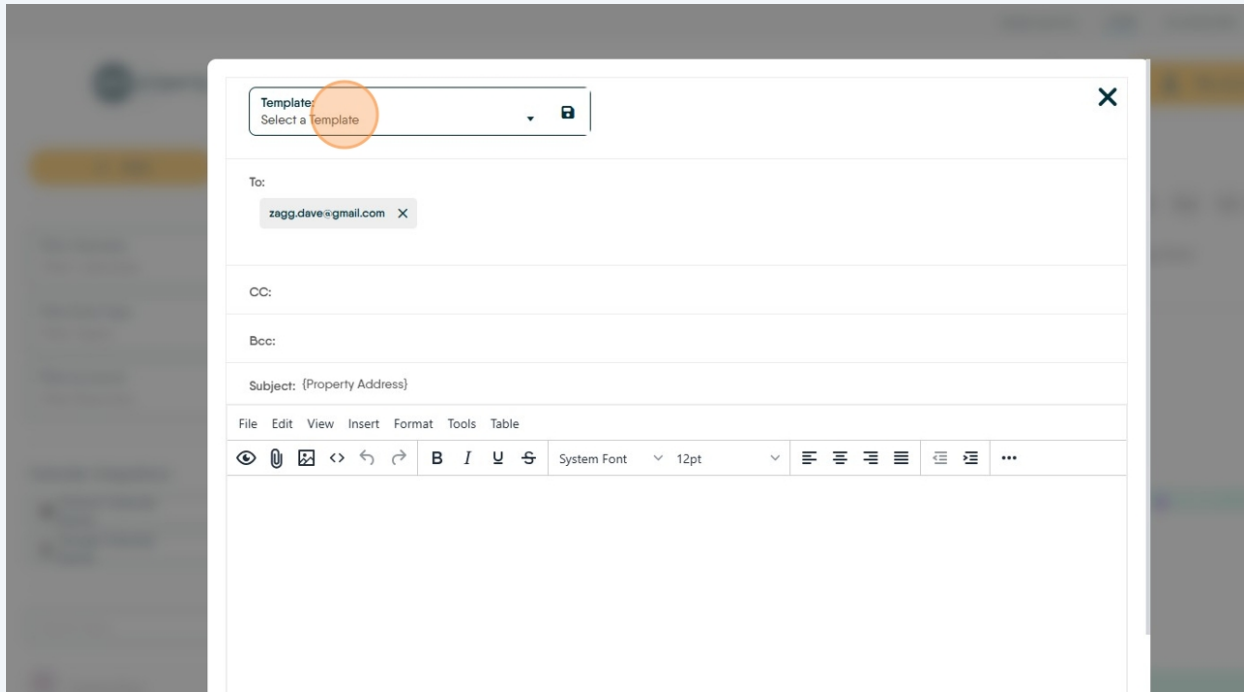
Cancel Save Appraisal



Alert! You may not have a message template created for this type of message. Please search the Help Center to find the guide on how to create a Template.

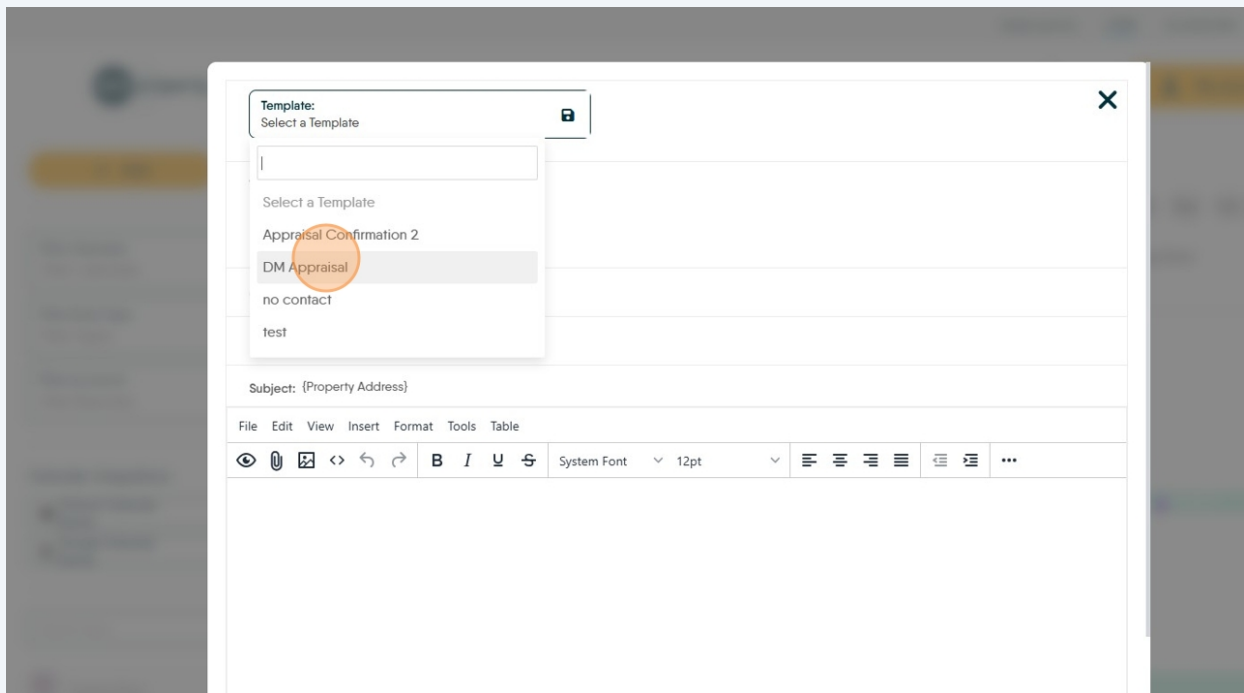
3

IF YOU HAVE A TEMPLATE Click "Select a Template" and if you have a message template created for this it will show in the drop down menu.



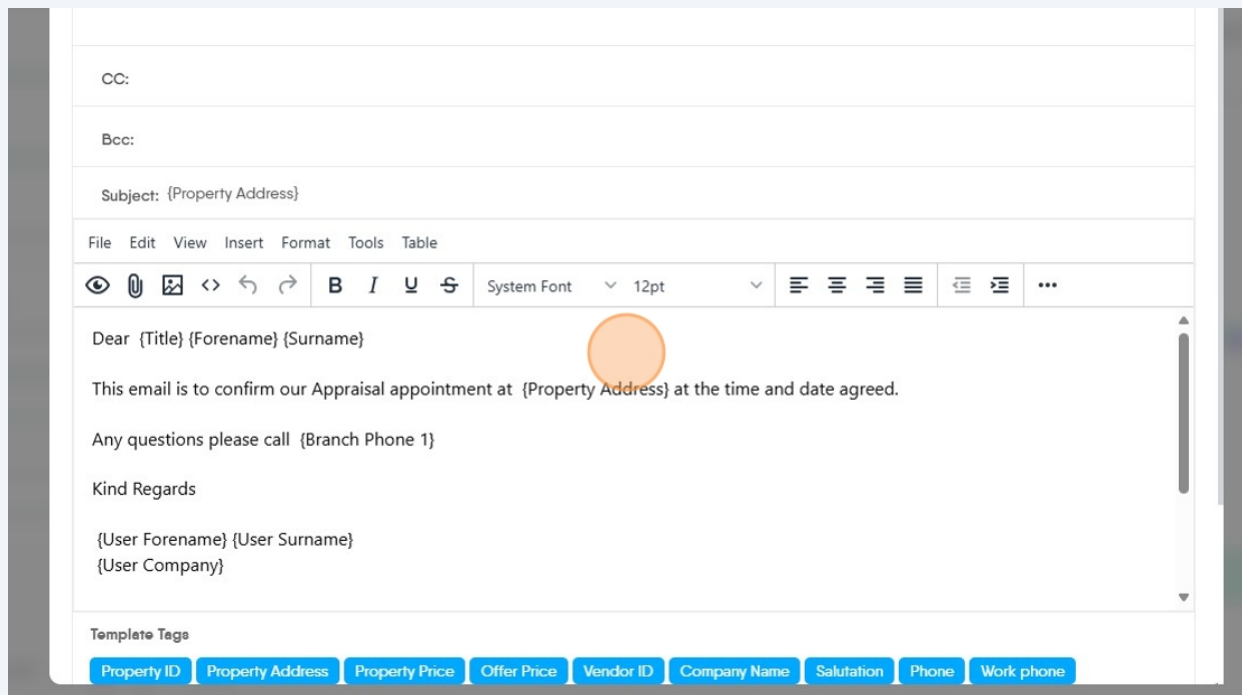
4

IF YOU HAVE A TEMPLATE Click on the name of your Appraisal confirmation template



5 If you have a template selected it will show on this screen.

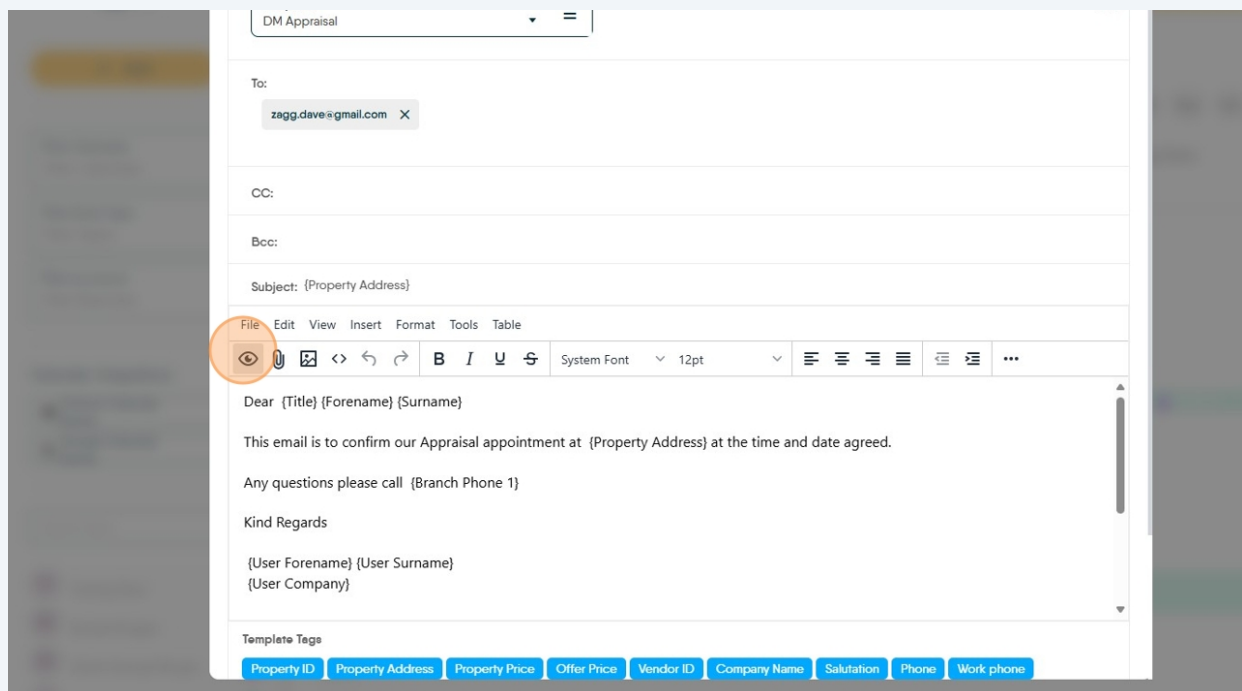
If you do not have a template created type your message on the screen here.



The screenshot shows an email template editor. At the top, there are fields for 'CC:', 'Bcc:', and 'Subject: {Property Address}'. Below these is a menu bar with 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', and 'Table'. A toolbar contains icons for undo, redo, bold, italic, underline, and strikethrough, along with a font dropdown set to 'System Font' and a size dropdown set to '12pt'. The main text area contains the following template text: 'Dear {Title} {Forename} {Surname}', 'This email is to confirm our Appraisal appointment at {Property Address} at the time and date agreed.', 'Any questions please call {Branch Phone 1}', 'Kind Regards', and '{User Forename} {User Surname}' followed by '{User Company}'. At the bottom, a 'Template Tags' section lists various tags in blue buttons: 'Property ID', 'Property Address', 'Property Price', 'Offer Price', 'Vendor ID', 'Company Name', 'Salutation', 'Phone', and 'Work phone'. An orange circle highlights the 'View' icon in the toolbar.

6 Click here to preview your templated message.

Click "Close" to exit the preview



The screenshot shows the email template preview interface. At the top, there is a dropdown menu showing 'DM Appraisal'. Below this are fields for 'To:' (with the email 'zaggsdave@gmail.com' and a close button), 'CC:', 'Bcc:', and 'Subject: {Property Address}'. A menu bar and toolbar are present, similar to the editor, but the 'View' icon in the toolbar is highlighted with an orange circle. The main text area displays the preview of the email template with the same text as in the editor: 'Dear {Title} {Forename} {Surname}', 'This email is to confirm our Appraisal appointment at {Property Address} at the time and date agreed.', 'Any questions please call {Branch Phone 1}', 'Kind Regards', and '{User Forename} {User Surname}' followed by '{User Company}'. At the bottom, the 'Template Tags' section is visible with the same set of blue buttons: 'Property ID', 'Property Address', 'Property Price', 'Offer Price', 'Vendor ID', 'Company Name', 'Salutation', 'Phone', and 'Work phone'.

Preview

Dear Mr Alfie Martin

This email is to confirm our Appraisal appointment at 162 Yew Tree Close, Hurworth, Darlington at the time and date agreed.

Any questions please call 01865 860870

Kind Regards

Training Dave
ovhomes.com



Preview

Dear Mr Alfie Martin

This email is to confirm our Appraisal appointment at 162 Yew Tree Close, Hurworth, Darlington at the time and date agreed.

Any questions please call 01865 860870

Kind Regards

Training Dave
ovhomes.com



Close

Template Tags

Property ID Property Address Property Price Offer Price Vendor ID Company Name Salutation Phone Work phone

7 Click "Send Email"

The screenshot shows an email composition interface. At the top, there are fields for 'Bcc:' and 'Subject: {Property Address}'. Below these is a menu bar with 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', and 'Table'. A toolbar contains icons for undo, redo, bold, italic, underline, link, unlink, and text color, along with a font dropdown set to 'System Font' and a size dropdown set to '12pt'. The email body contains the following text: 'Dear {Title} {Forename} {Surname}', 'This email is to confirm our Appraisal appointment at {Property Address} at the time and date agreed.', 'Any questions please call {Branch Phone 1}', 'Kind Regards', and a signature block with '{User Forename} {User Surname}' and '{User Company}'. Below the email body is a 'Template Tags' section with a grid of blue buttons for inserting dynamic content. The buttons are arranged in five rows: Row 1: Property ID, Property Address, Property Price, Offer Price, Vendor ID, Company Name, Salutation, Phone, Work phone; Row 2: Mobile phone, Email, Title, Forename, Surname, Full Address, Address, Town, Postcode, Branch Name, Branch Phone 1; Row 3: Branch Phone 2, Branch Email, Branch Fax, Branch Property No, Branch Address 1, Branch Address 2, Branch Town, Branch County; Row 4: Branch Postcode, Branch Logo URL, User Title, User Forename, User Surname, User Phone, User Work Phone, User Email, User Mobile; Row 5: User Company, User Job Title. At the bottom right of the composition area, a yellow 'Send Email' button with a right-pointing arrow is highlighted with an orange circle.

Bcc:

Subject: {Property Address}

File Edit View Insert Format Tools Table

System Font 12pt

Dear {Title} {Forename} {Surname}

This email is to confirm our Appraisal appointment at {Property Address} at the time and date agreed.

Any questions please call {Branch Phone 1}

Kind Regards

{User Forename} {User Surname}

{User Company}

Template Tags

| | | | | | | | | | | |
|-----------------|------------------|----------------|--------------------|------------------|------------------|-----------------|---------------|-------------|-------------|----------------|
| Property ID | Property Address | Property Price | Offer Price | Vendor ID | Company Name | Salutation | Phone | Work phone | | |
| Mobile phone | Email | Title | Forename | Surname | Full Address | 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 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 >

8 The email will be sent and a copy added to the Journal.