

Sending an Appraisal Confirmation Email



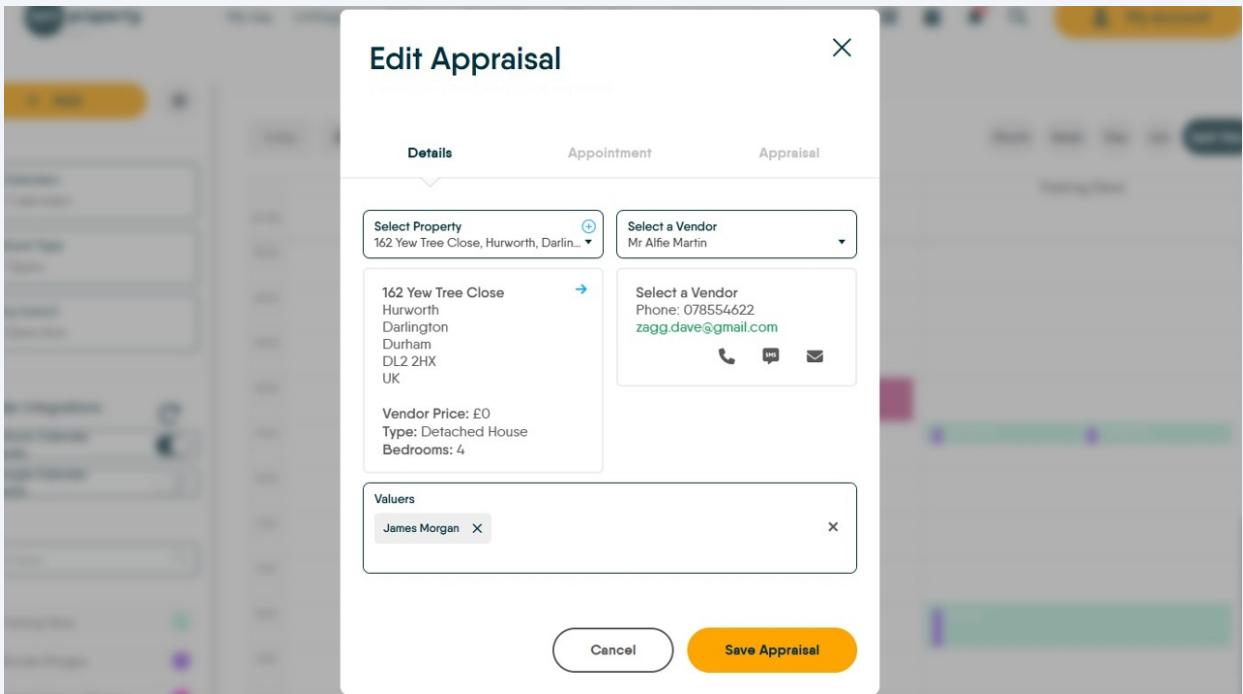
This guide simplifies the process of sending an appraisal confirmation email, ensuring you communicate effectively and professionally with clients.

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.



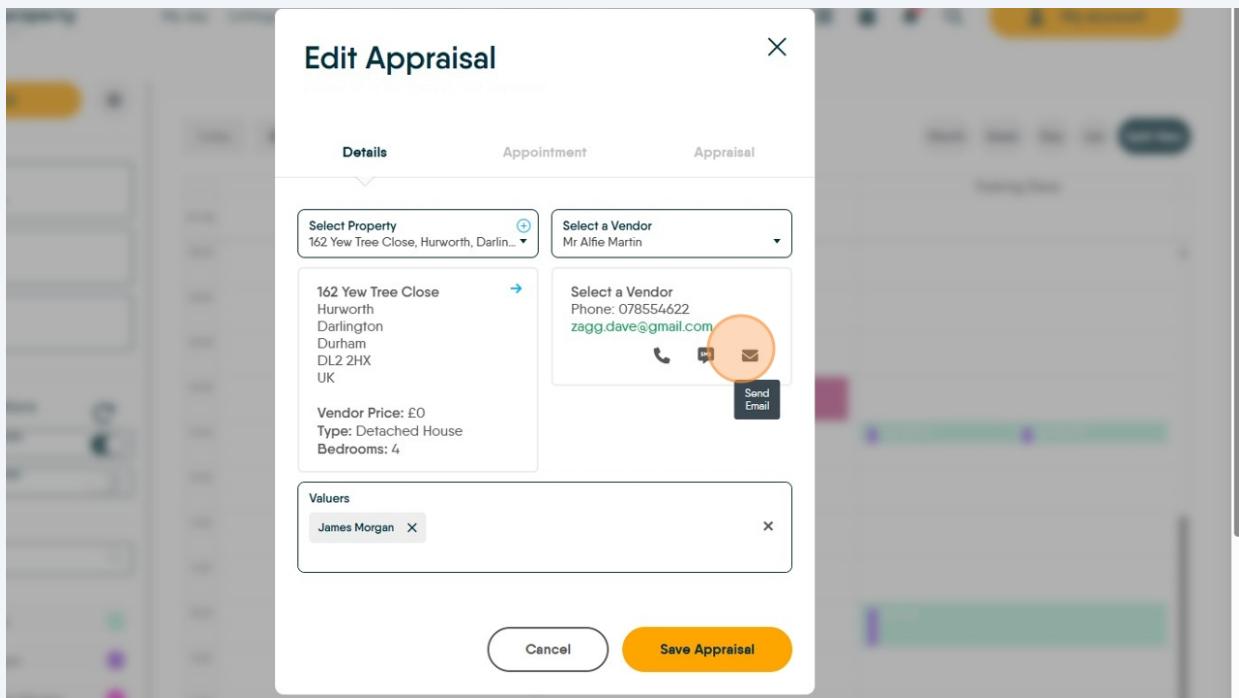
Alert! Your company may already have an automation that performs this process for you, if you are unsure please check with your Management before sending the message from here. If there is an automation in place, you can use this process to send a reminder out if you wanted.

- 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.



2

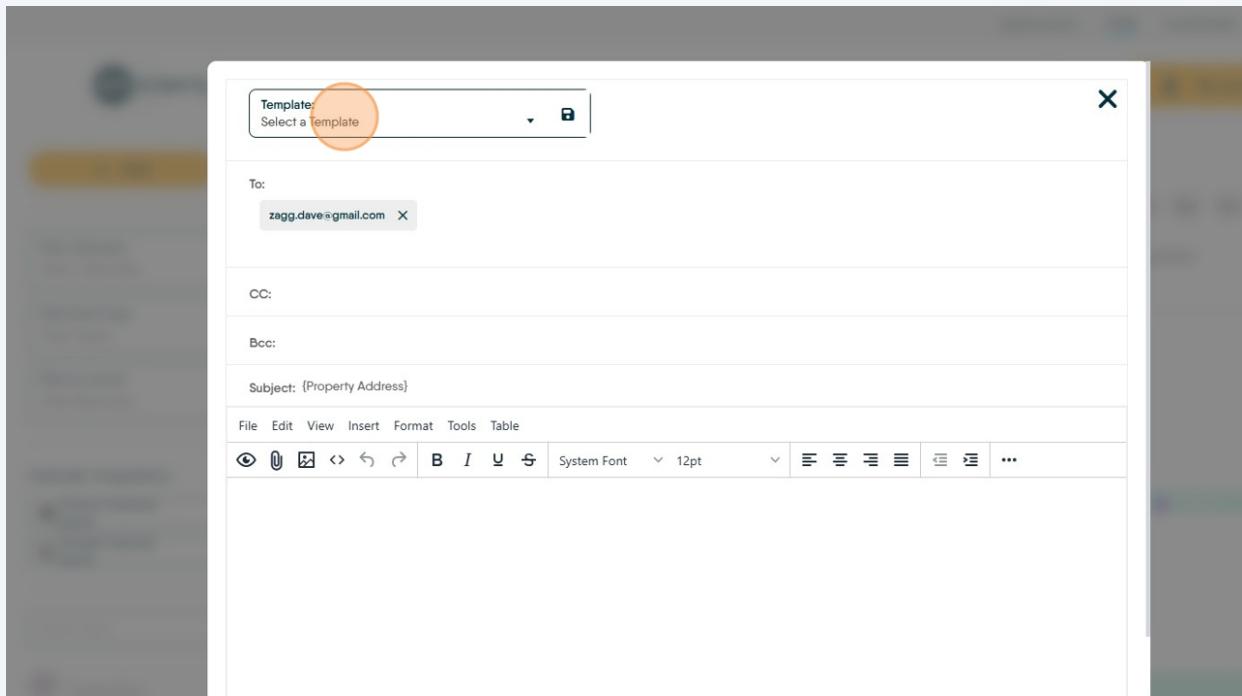
Click here.



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.

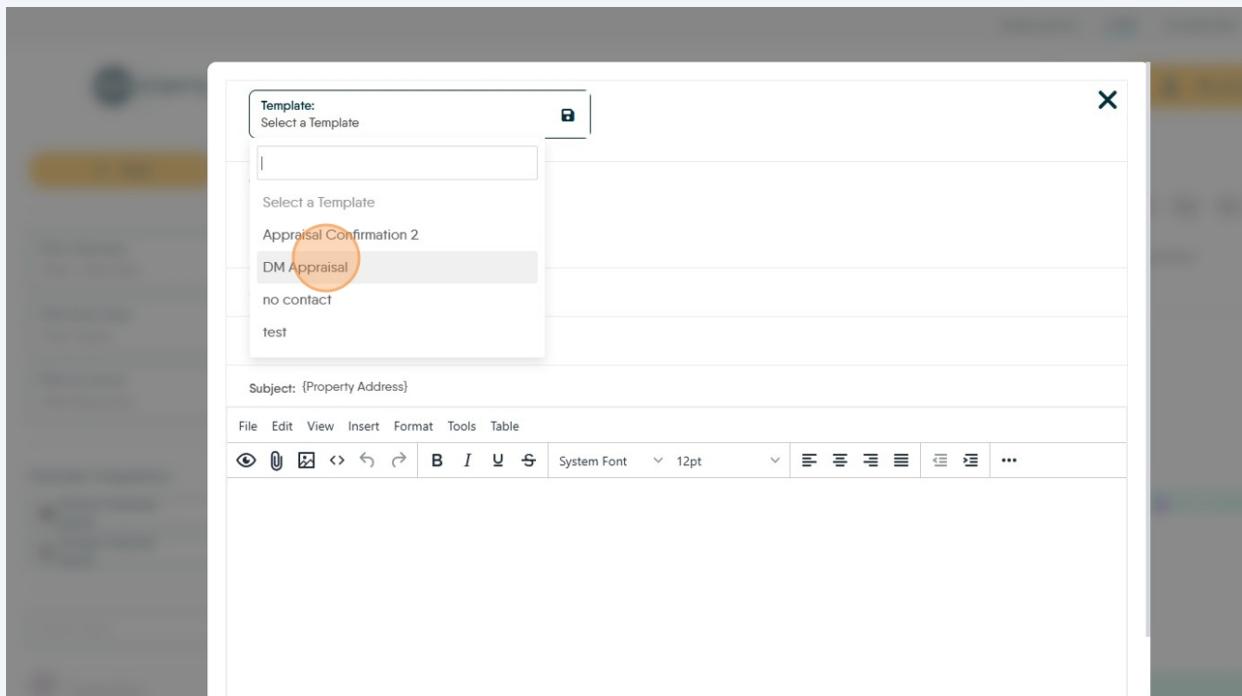
3

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.



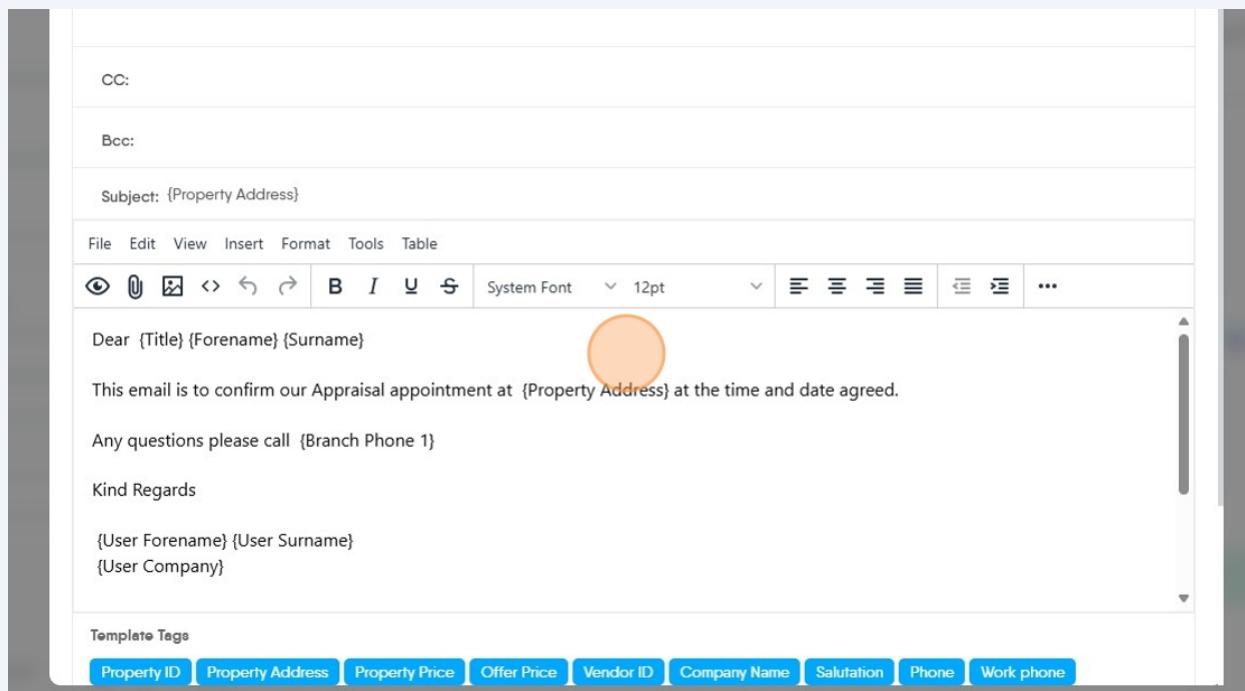
4

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



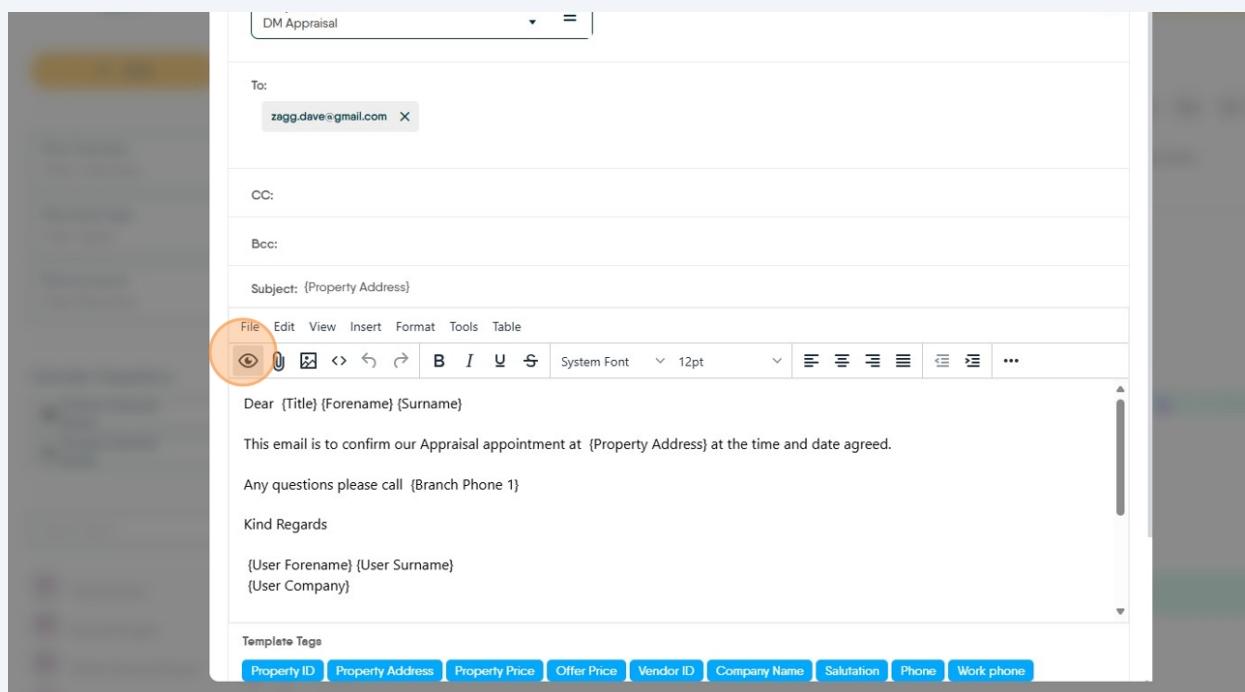
5 If you have a template selected it will show on this screen.

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



6 Click here to preview your templated message.

Click "Close" to exit the preview



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

X

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

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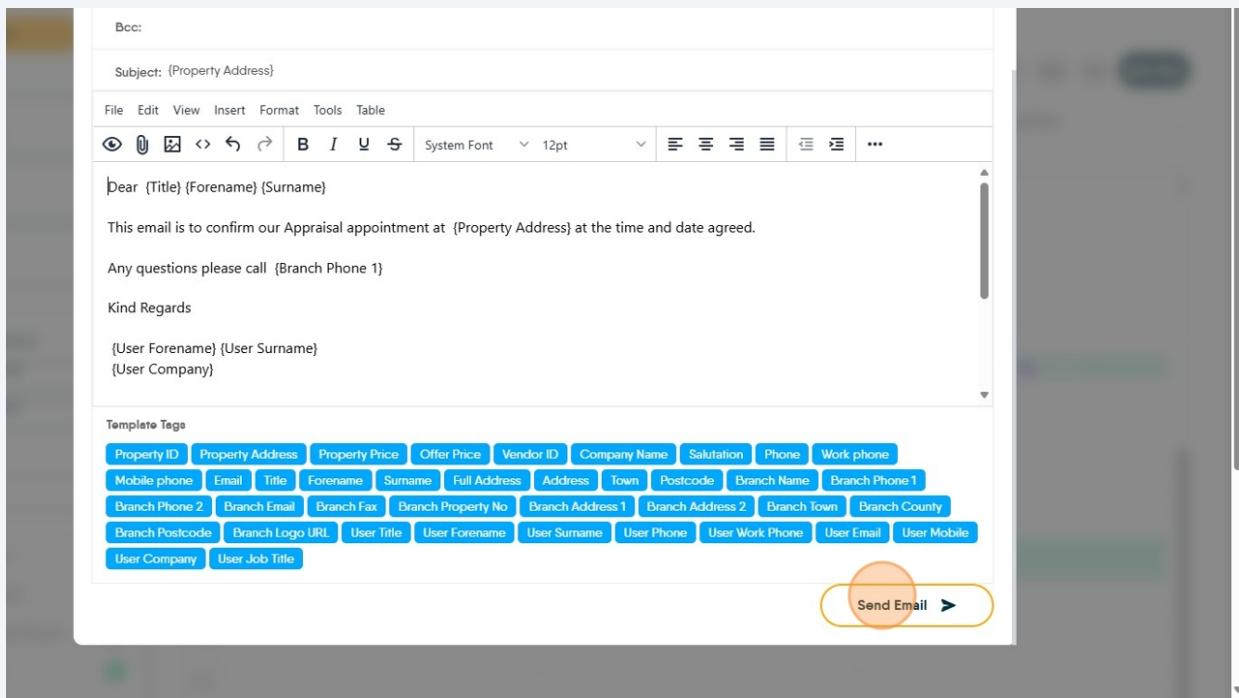
Close

Template Tags

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

7

Click "Send Email"



8

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