

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 the 'Edit Appraisal' form in a CRM platform. The form has a white background and a close button (X) in the top right corner. It is divided into three tabs: 'Details', 'Appointment', and 'Appraisal', with 'Details' currently selected. The 'Details' tab contains several sections: 'Select Property' with a dropdown menu showing '162 Yew Tree Close, Hurworth, Darlin...'; 'Select a Vendor' with a dropdown menu showing 'Mr Alfie Martin'; a section for the property address '162 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK' with a blue arrow icon; a section for 'Vendor Price: £0', 'Type: Detached House', and 'Bedrooms: 4'; and a 'Valuers' section with a dropdown menu showing 'James Morgan' and a close button (X). At the bottom of the form 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

162 Yew Tree Close
Hurworth
Darlington
Durham
DL2 2HX
UK

Vendor Price: £0
Type: Detached House
Bedrooms: 4

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

Send Email

Valuers
James Morgan

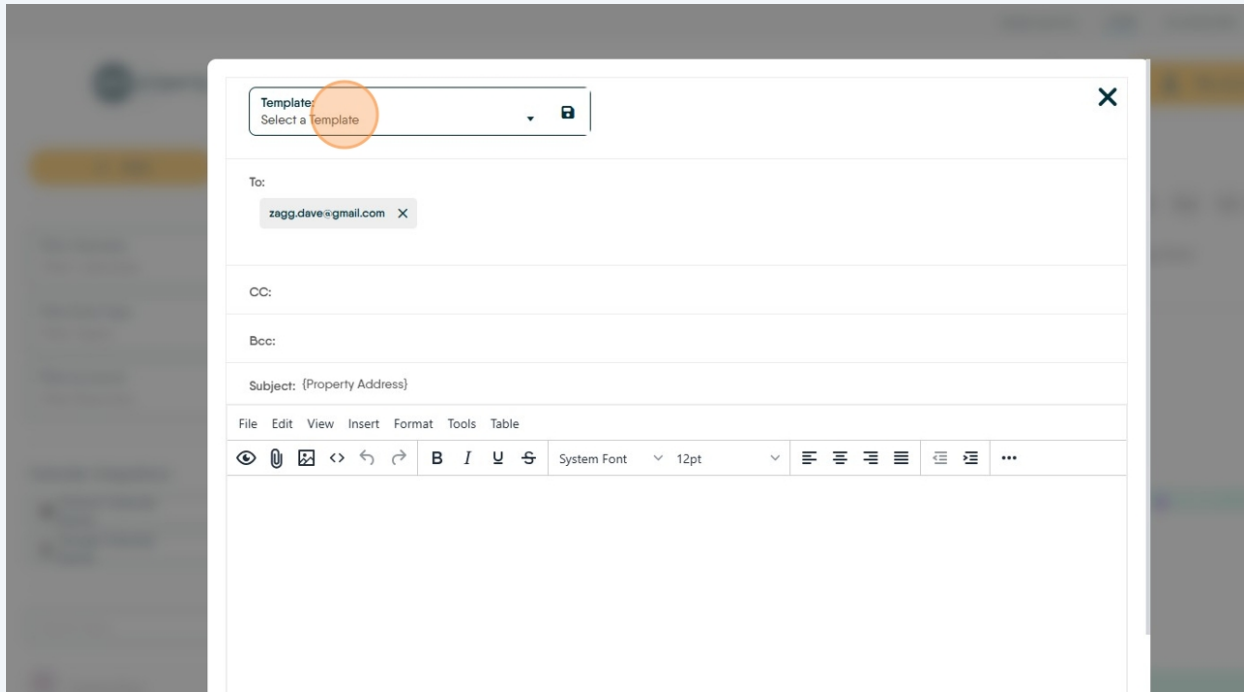
Cancel Save Appraisal



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.

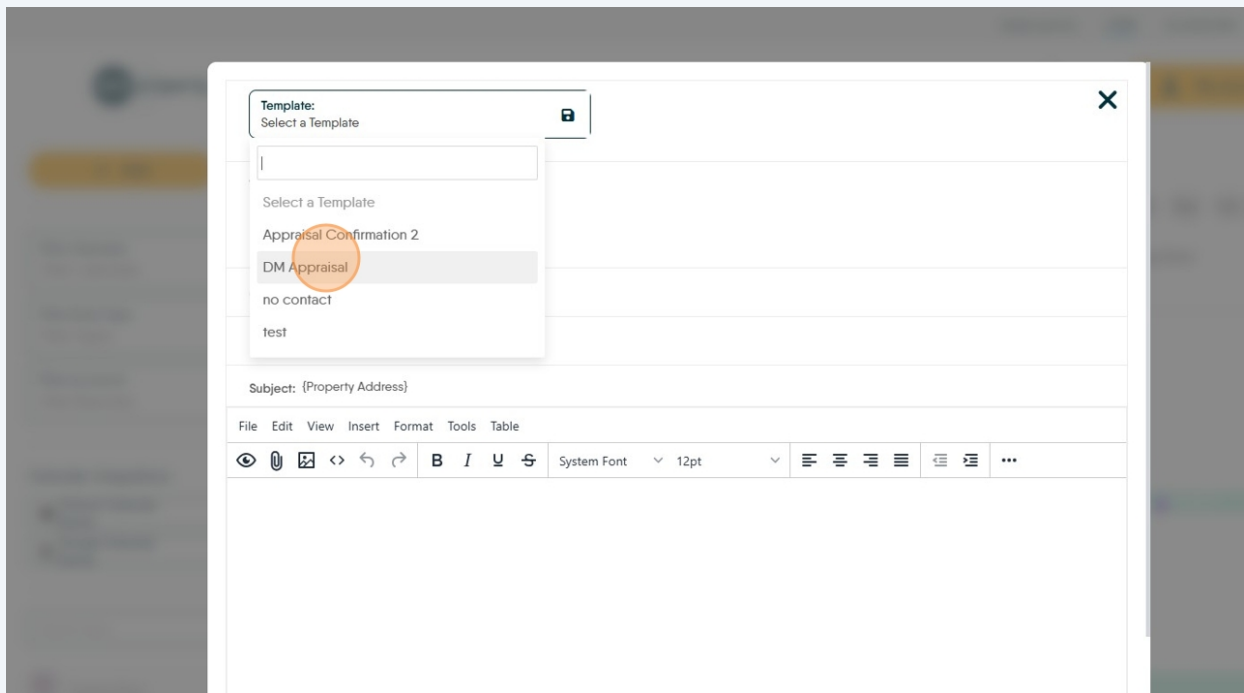
3

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.



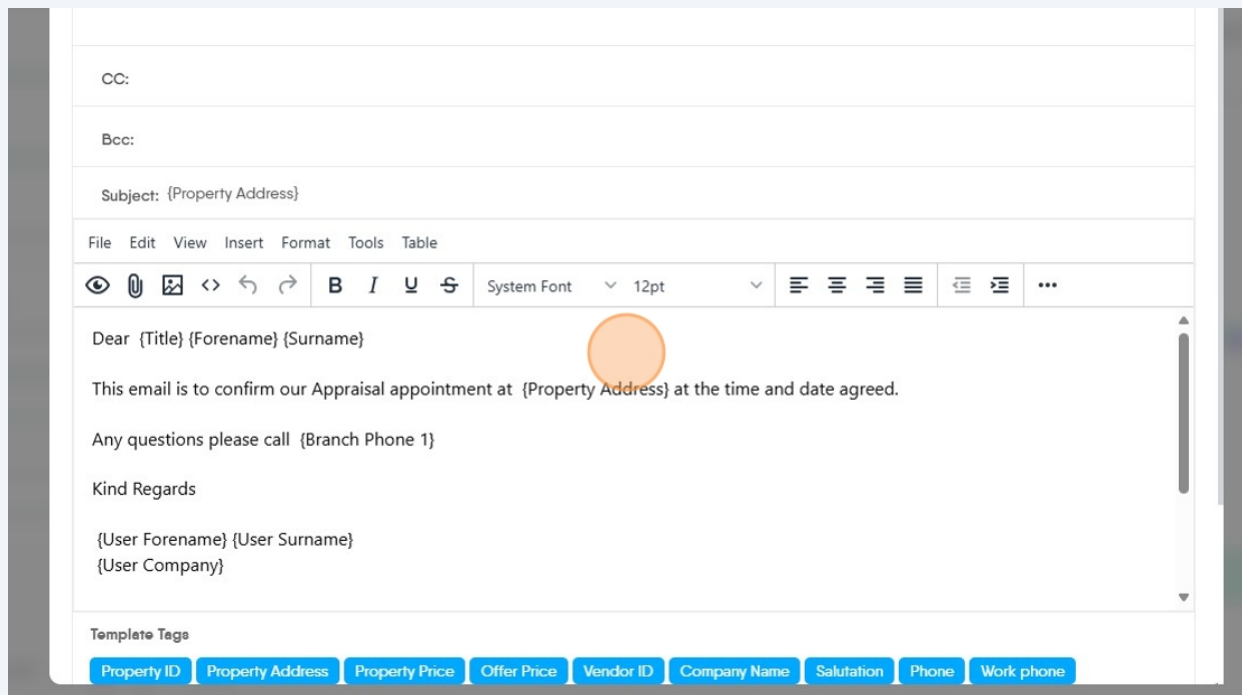
4

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.

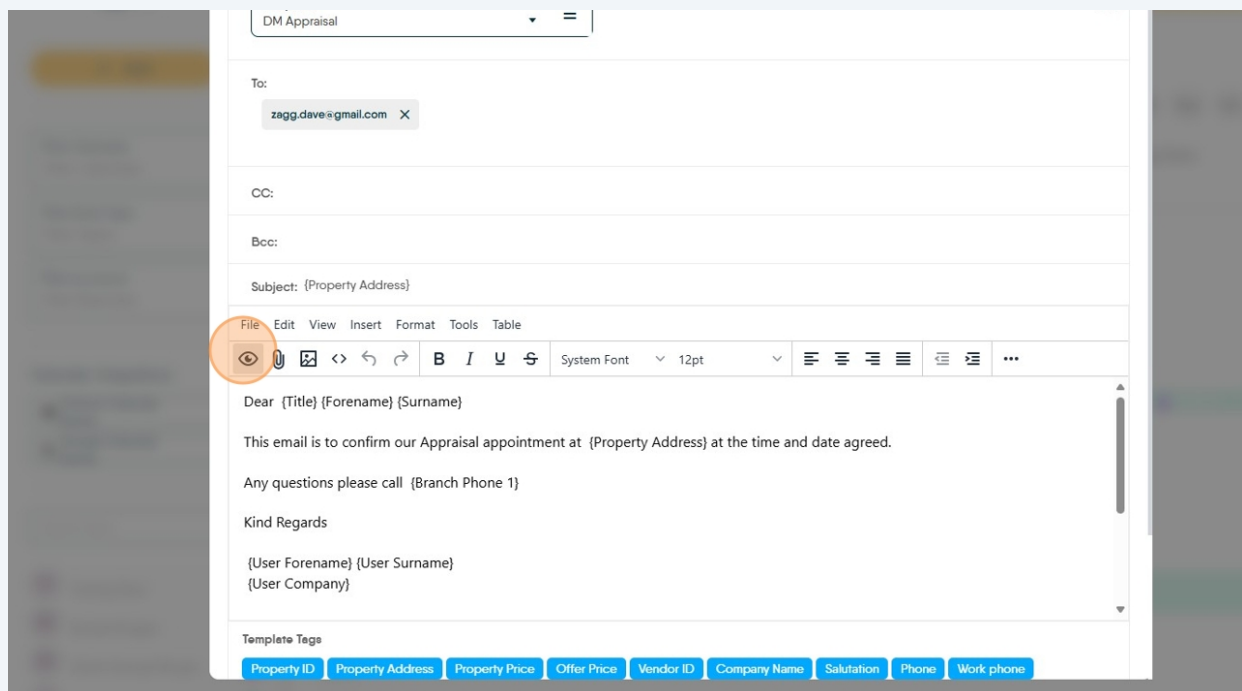
If you do not have a template created type your message on the screen here.



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 content: '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, there is a 'Template Tags' section with buttons for '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 set to 'DM Appraisal'. Below it are fields for 'To:' (with the email 'zaggsdave@gmail.com' and a close button), 'CC:', 'Bcc:', and 'Subject: {Property Address}'. A menu bar with 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', and 'Table' is present. The toolbar includes 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 same content as 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, there is a 'Template Tags' section with buttons for '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.

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 rich text editor toolbar follows, containing icons for undo, redo, bold, italic, underline, link, unlink, text color, background color, bulleted list, numbered list, indent, outdent, and a more options menu. 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 displaying a grid of blue buttons with various placeholder names like 'Property ID', 'Property Address', 'Property Price', etc. In the bottom right corner, a yellow 'Send Email' button with a right-pointing arrow is highlighted with an orange circle.

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