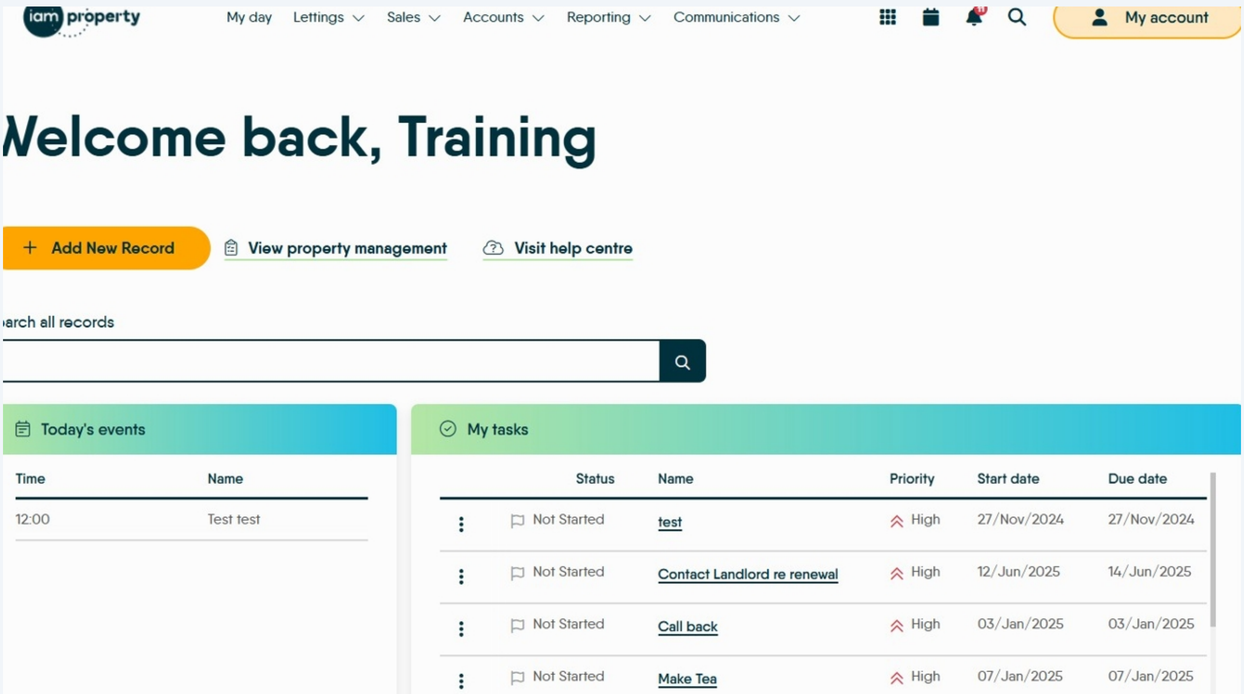
Adding a Logo to a Letter Template in CRM

This guide provides a step-by-step process for adding a logo to a letter template in iamproperty CRM, enhancing your branding and professionalism in communications. Also this guide shows how to add merge tags to automatically add client data.

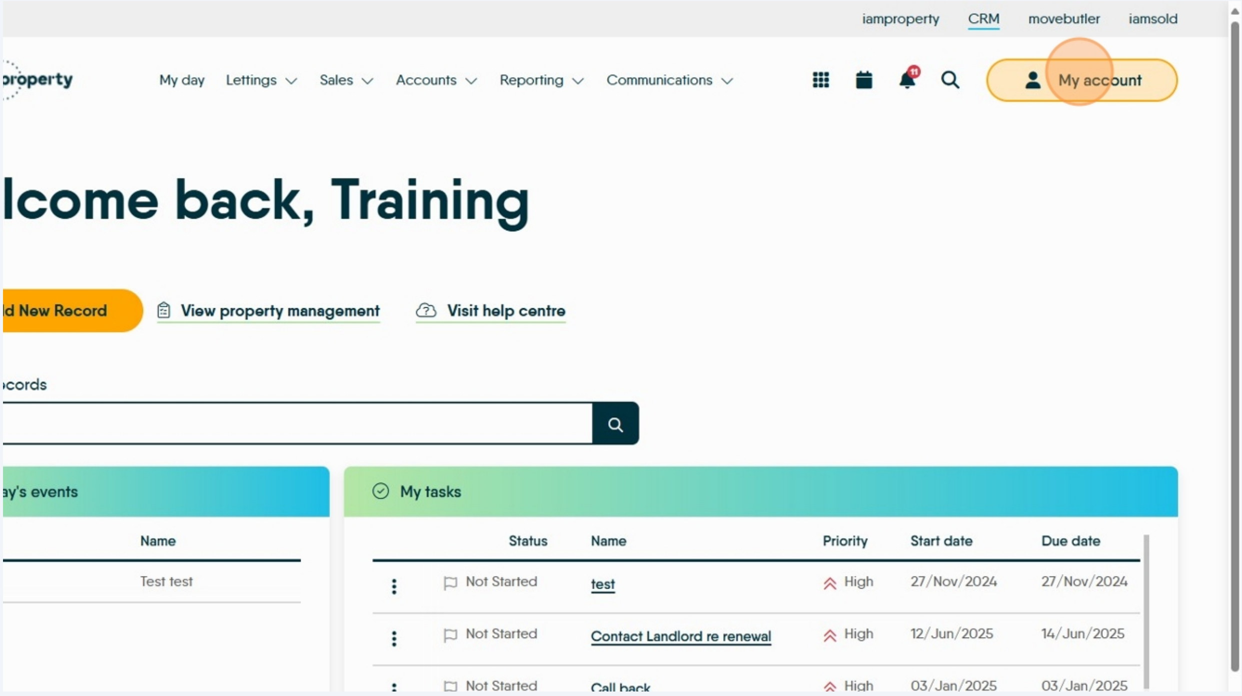
By following these clear instructions, you can easily customise letters for your lettings applicants. This guide will save you time and help you maintain consistency across your correspondence, ultimately improving your business's image.

1 When creating a letter to be uploaded to CRM the letter must be created and saved in .RTF format. This can easily be done in MS Word or other similar software.

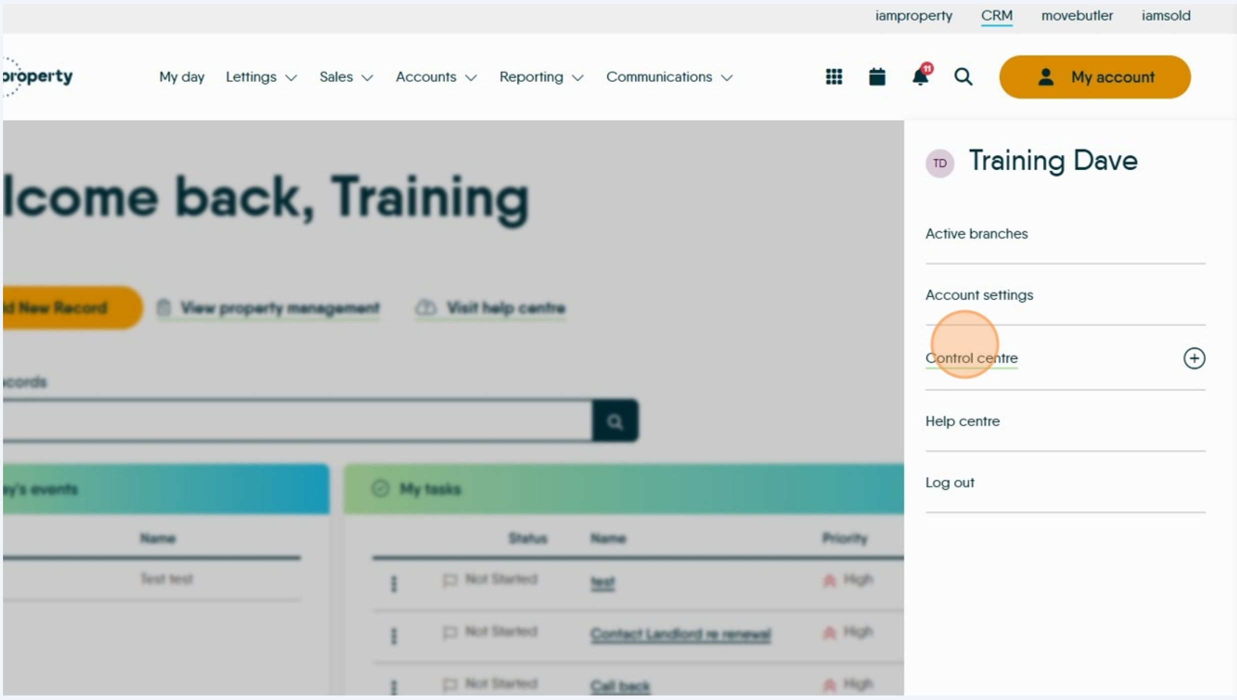
2 Navigate to https://crm.iamproperty.com/MyDay



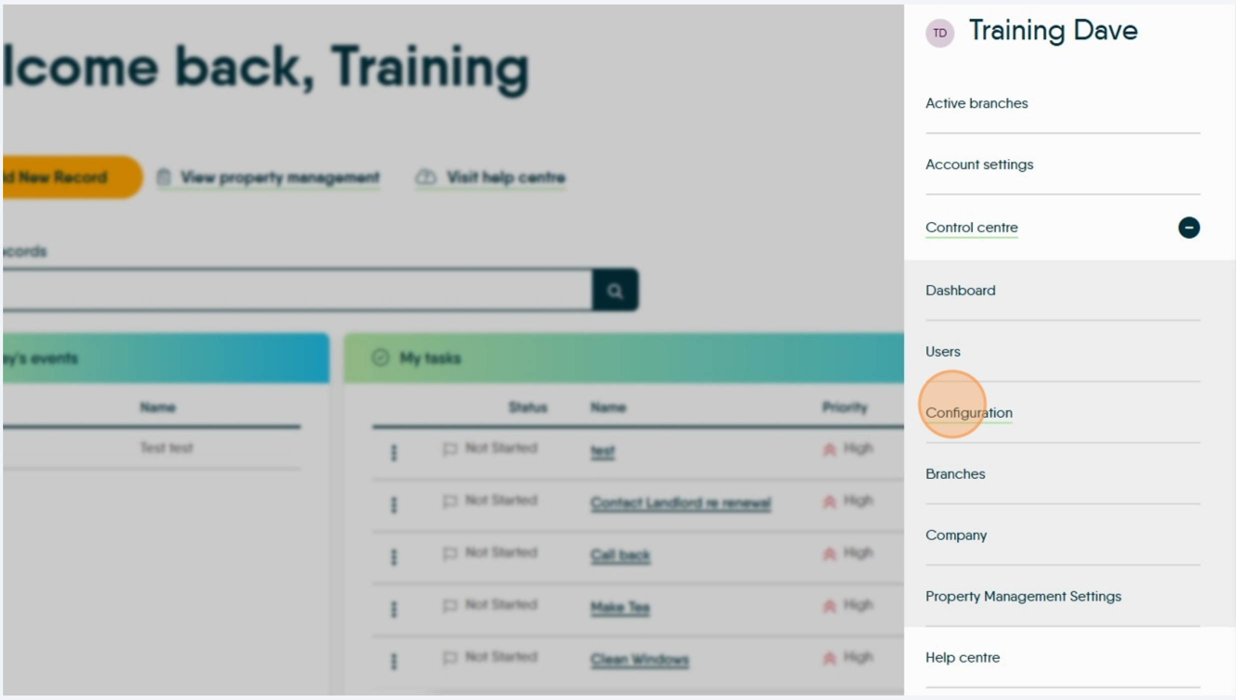
3 Click "My account"



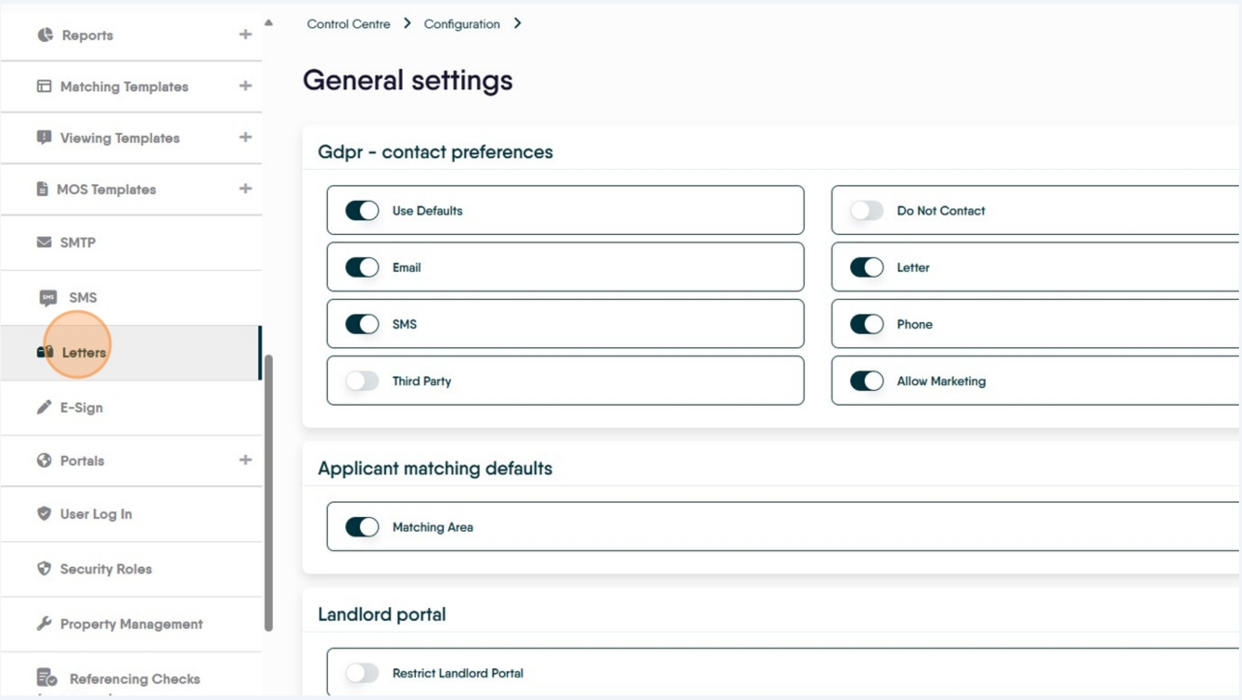
4 Click "Control centre"



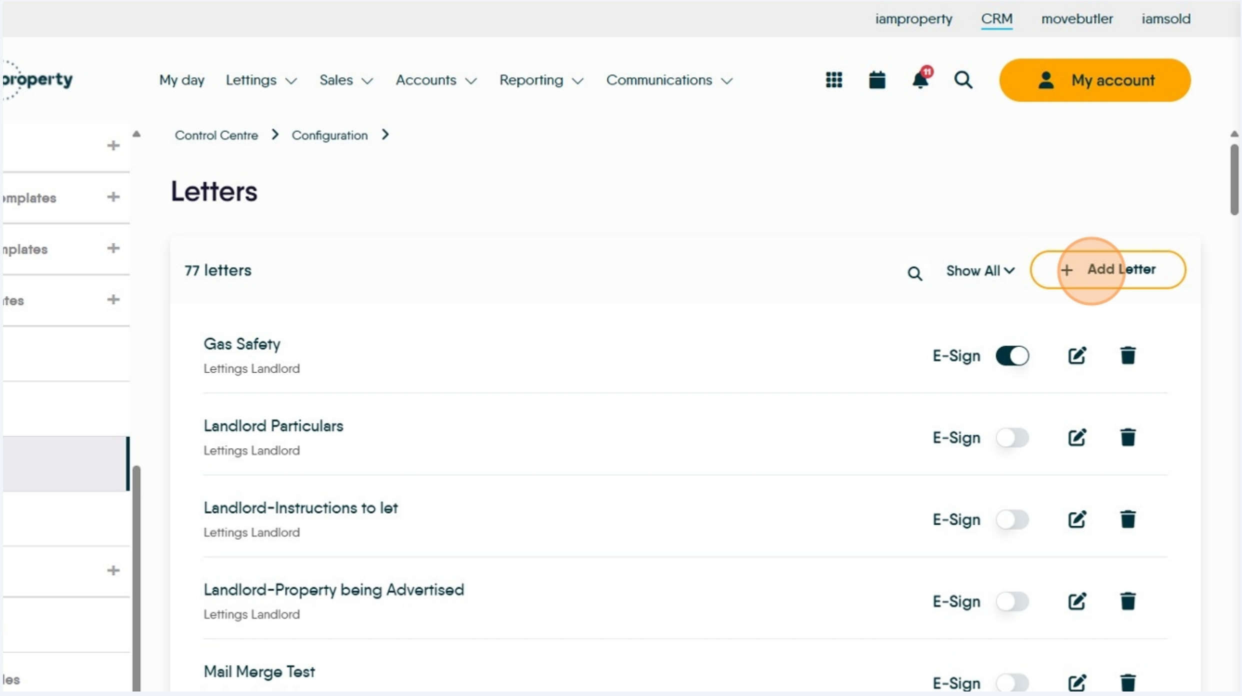
5 Click "Configuration"



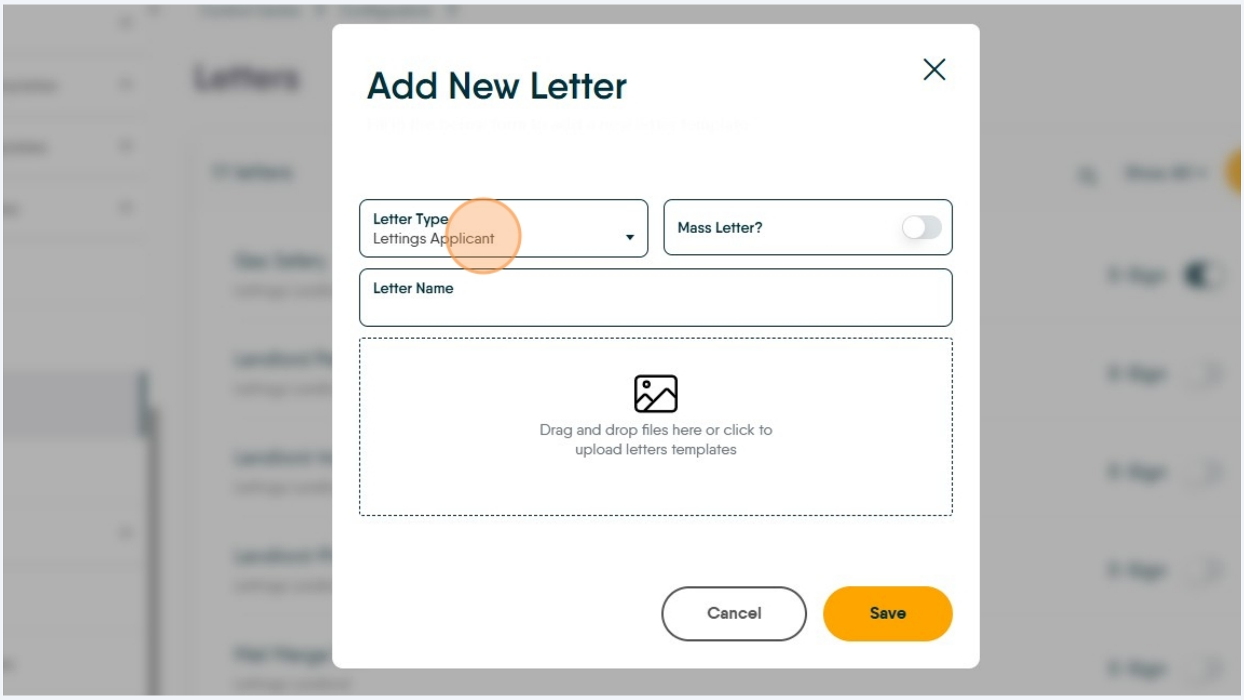
6 Scroll down and Click "Letters"



7 If you are adding a new letter click "Add Letter" otherwise follow this guide from step 13.



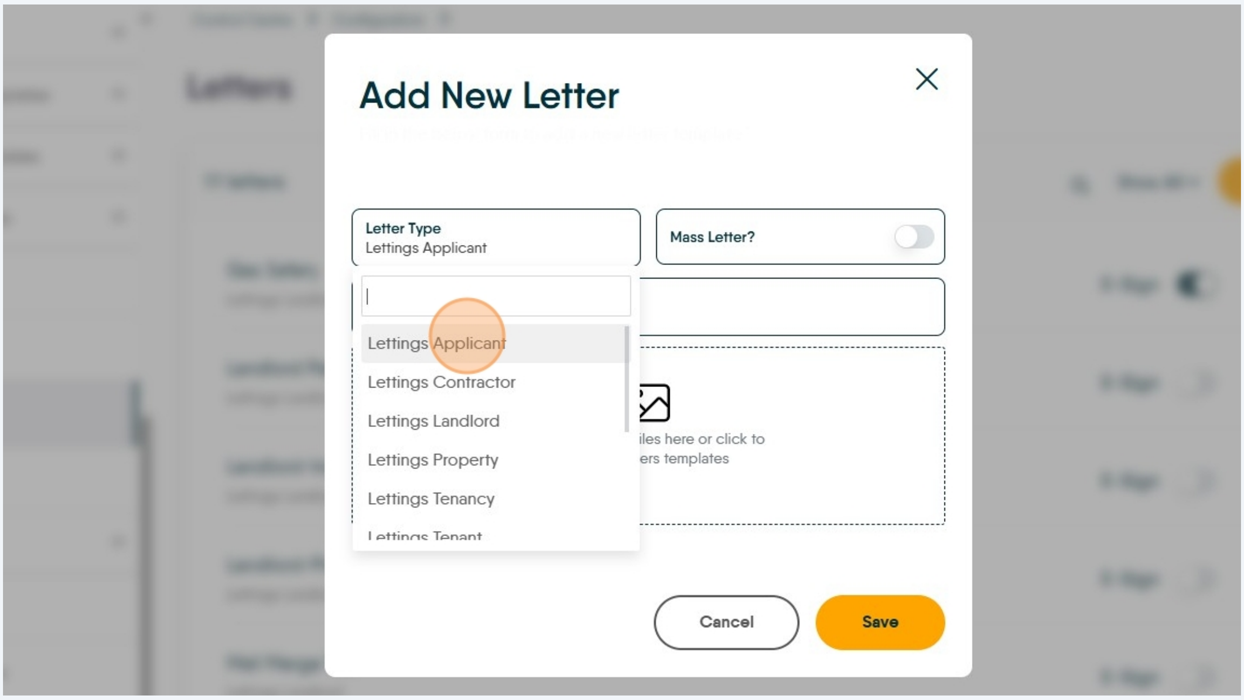
8 Click "Letter Type" and select the recipient you are creating the letter for.



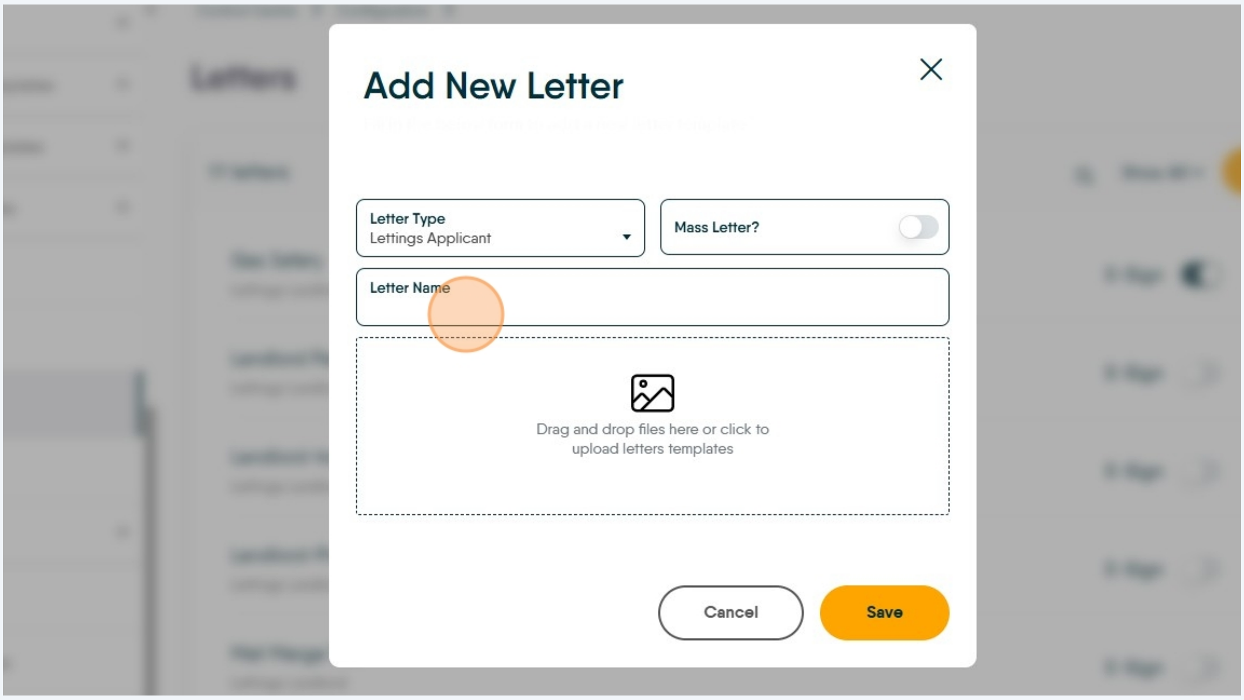
Alert! When creating a letter in CRM it is important you create the correct letter type in the Add New Letter section. If you select Lettings Applicant as the letter type, this letter will only be available in the Lettings Applicant area of CRM and NOT in another section e.g. Landlord. If you want a letter in multiple places it needs to be created into those areas.

9

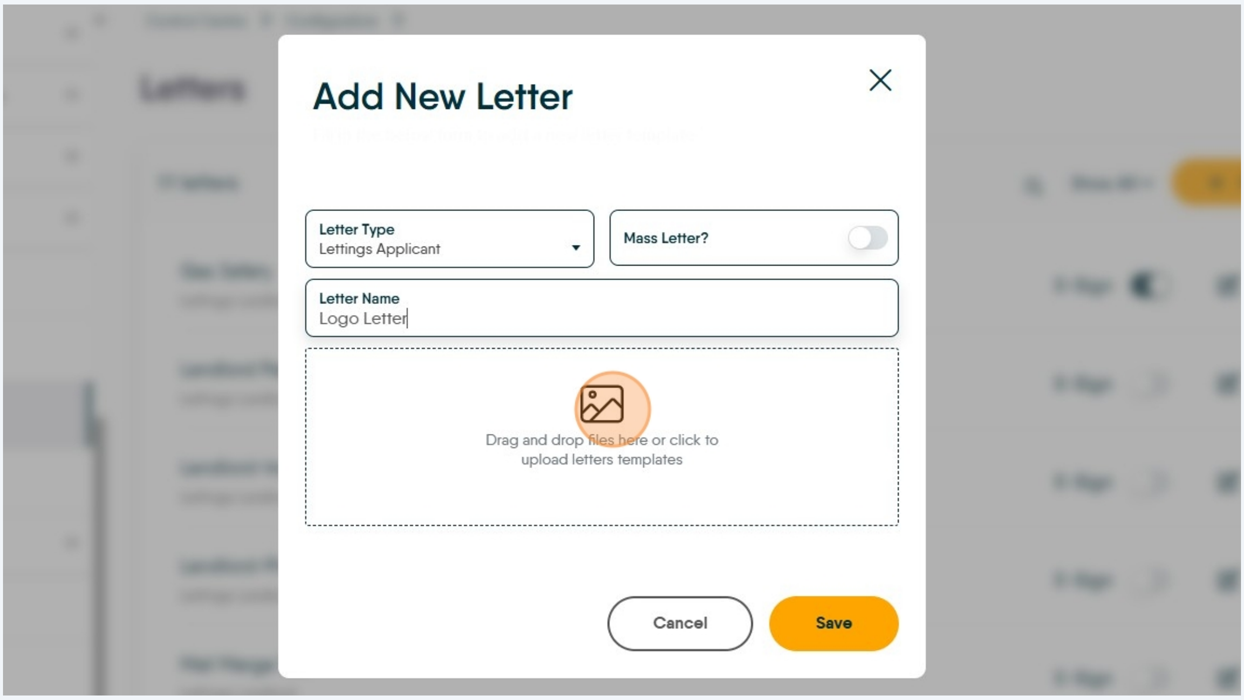
Click and select the letter type from the drop down menu.



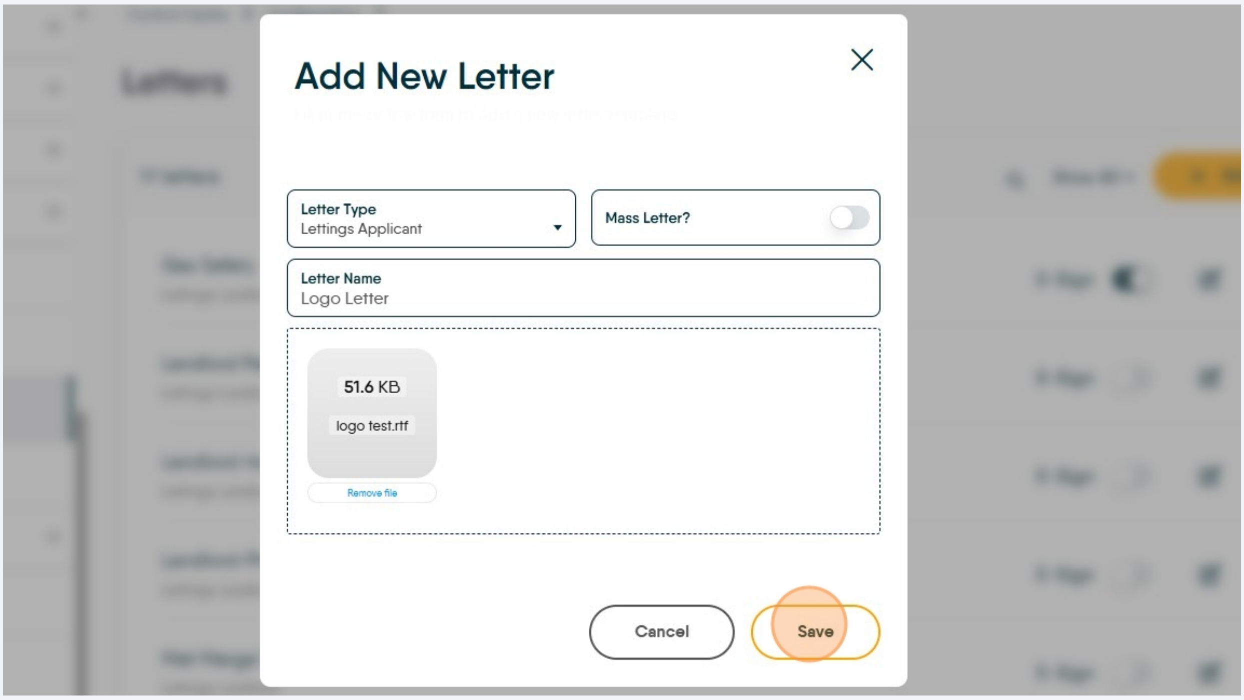
10 Click the "Letter Name" field, name your letter as you would like it to be seen in CRM



11 Click "Drag and drop files here or click to upload letters templates" this will take you to a documents screen where you can search for and find your letter.

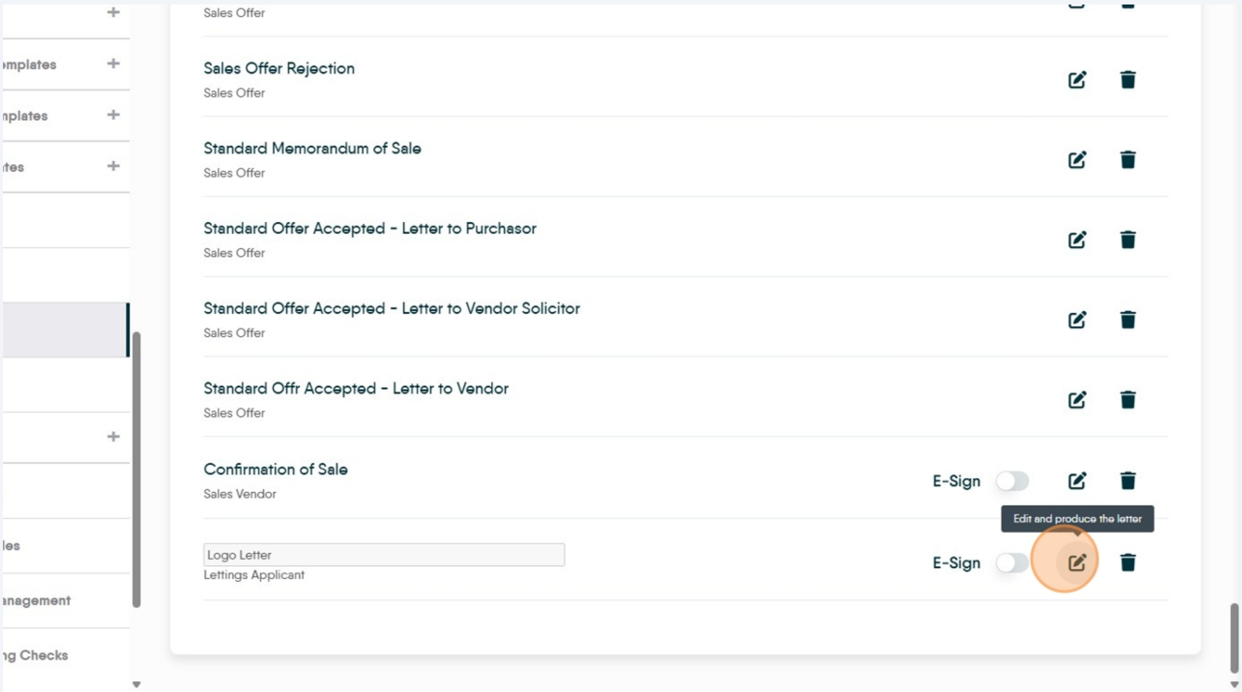


12 Once your document is added click "Save"

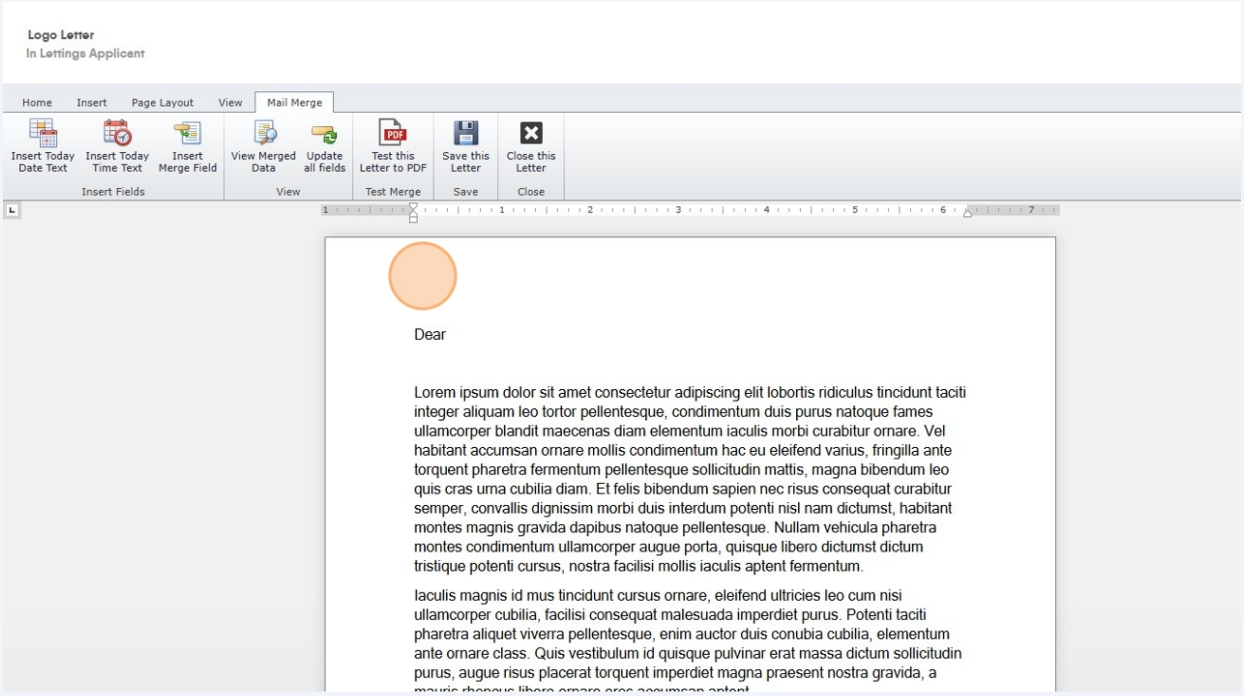


Adding the Logo

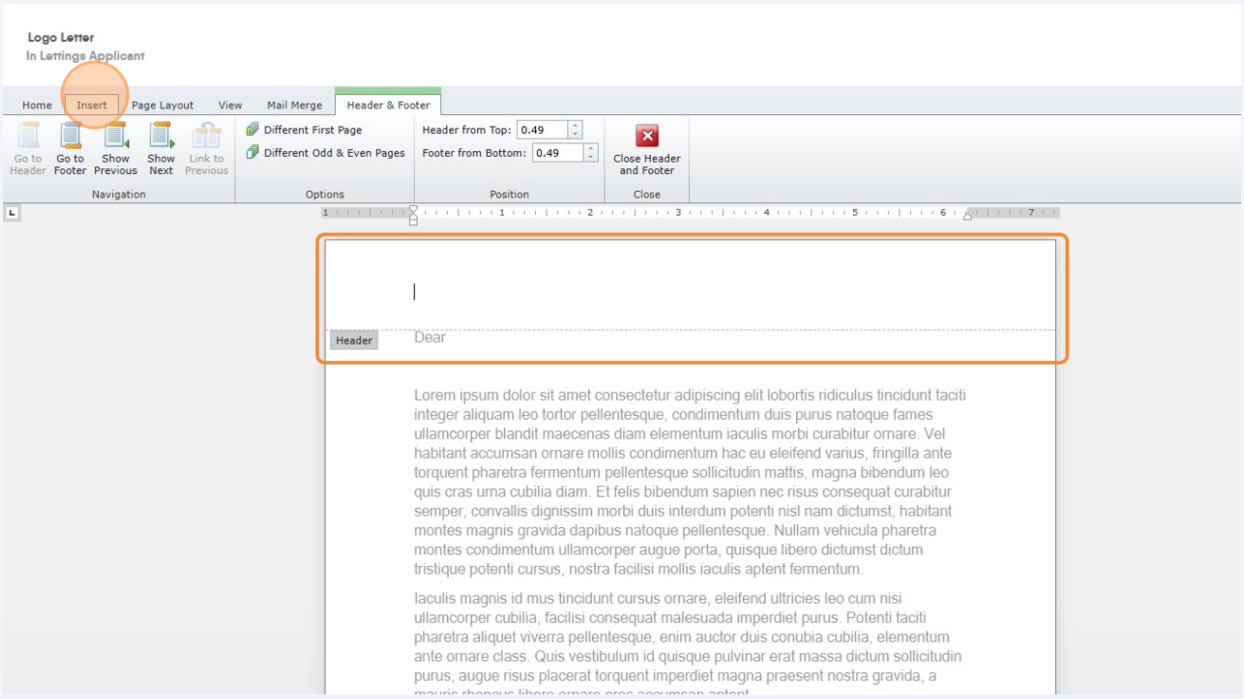
13 In the letters menu of CRM scroll to find the letter you have just added, it will most likely be at the end of the list. Click here to open the editor.



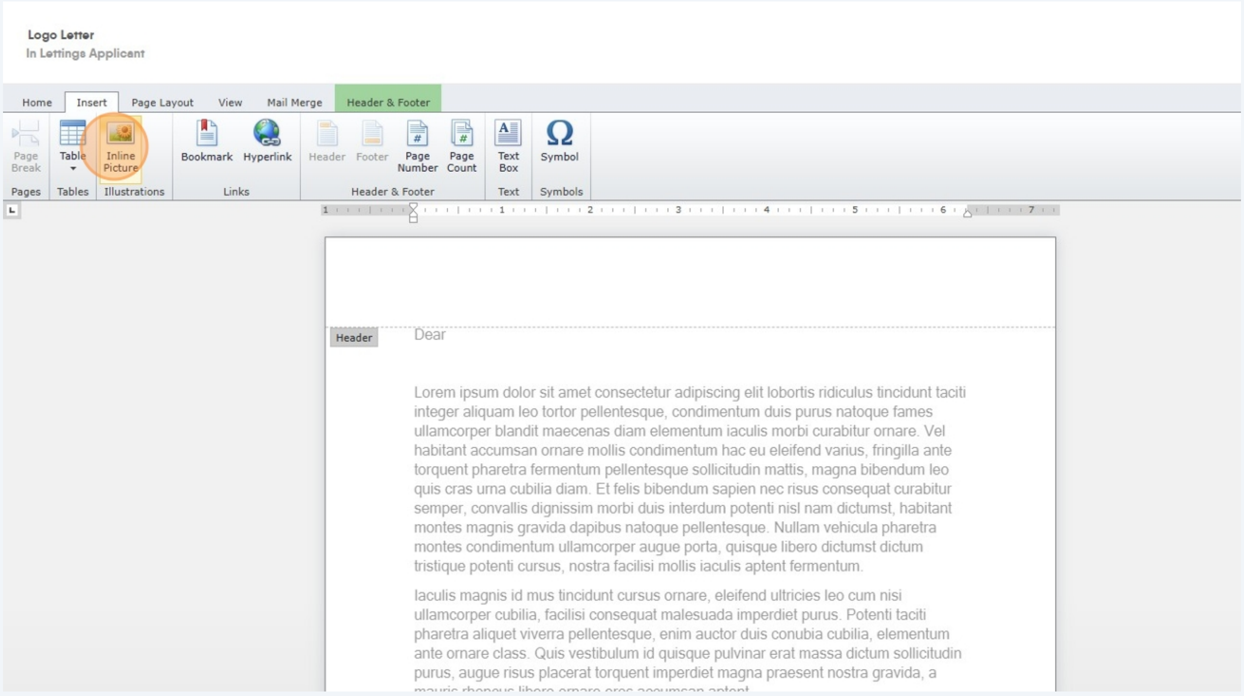
14 Double-click at the top of the screen to open the 'Header' of your document.



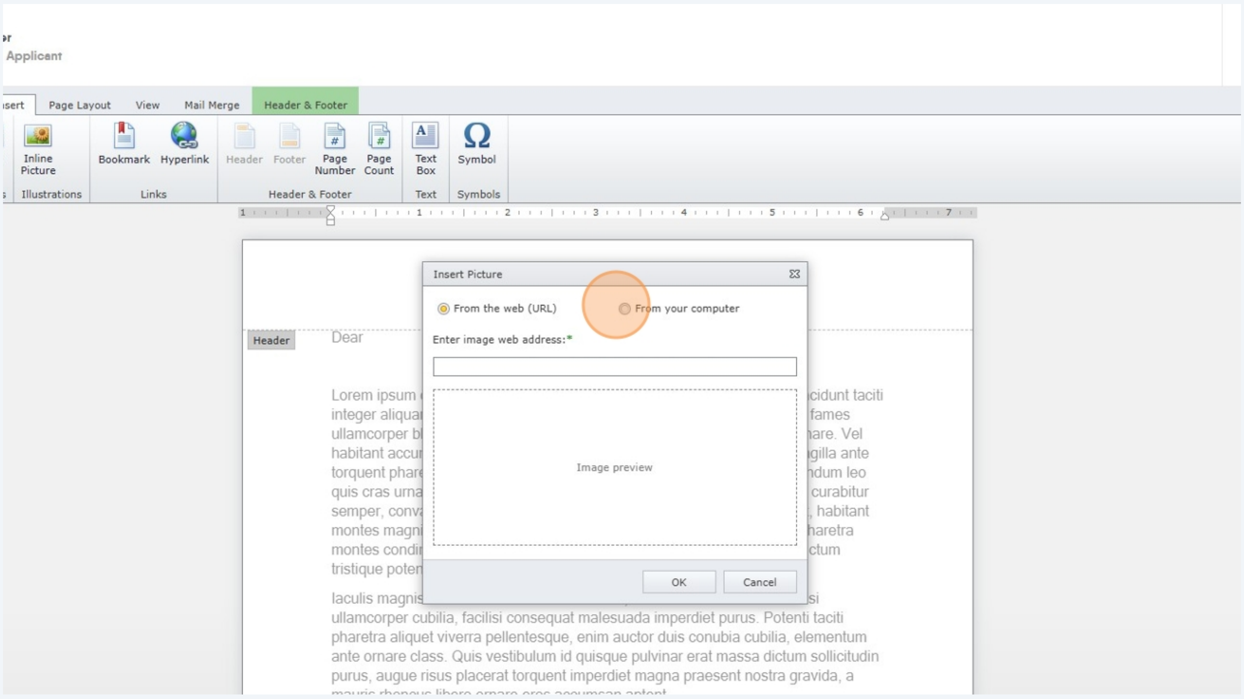
15 Click "Insert"



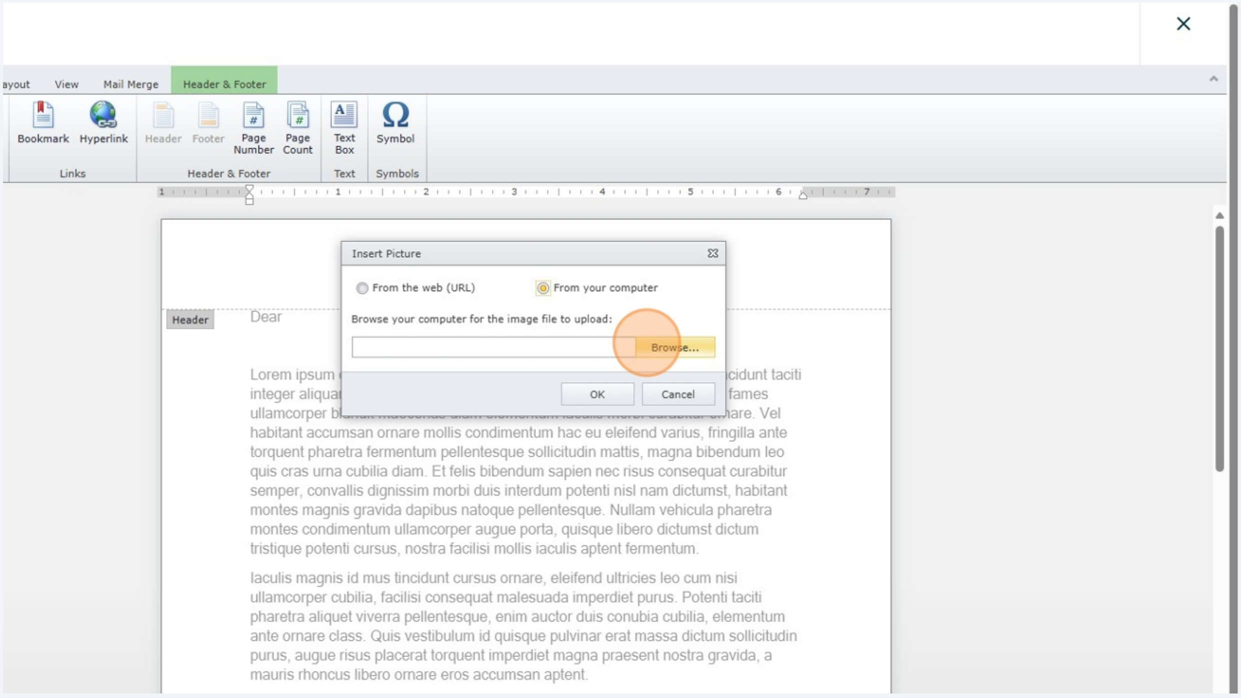
16 Click "Inline Picture"



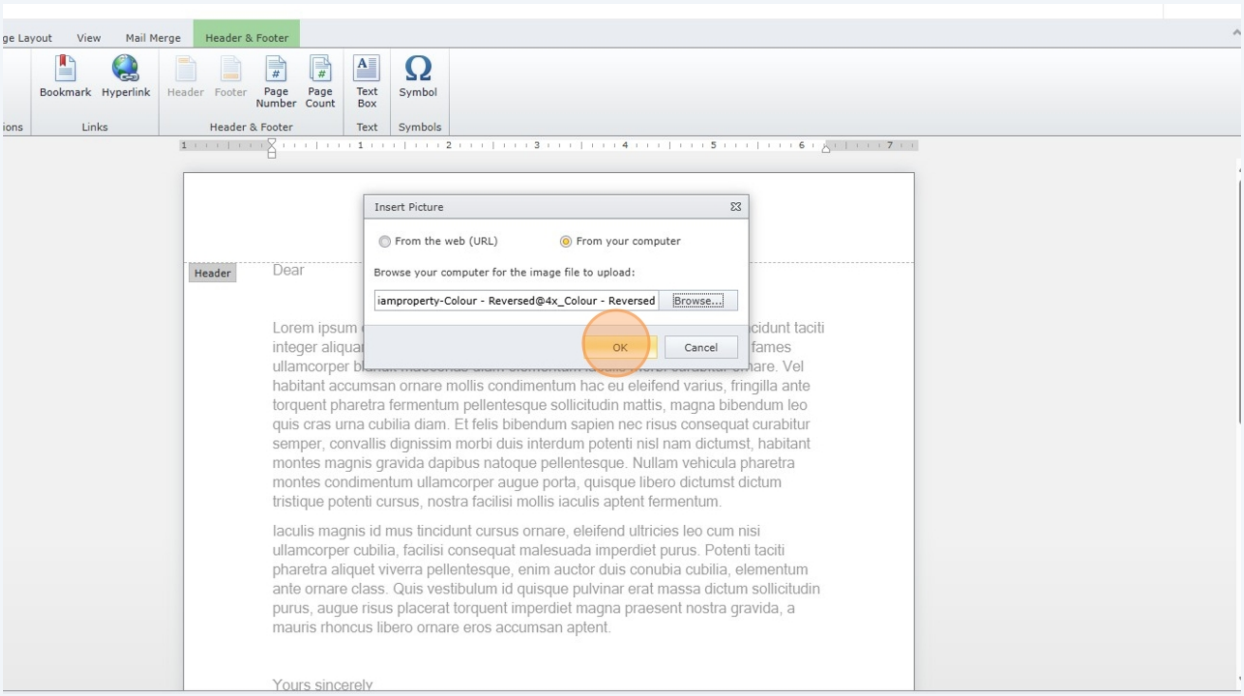
17 In the 'Insert Picture' section you can link to an image on the internet or (most likely) find an image on your computer and link to that.



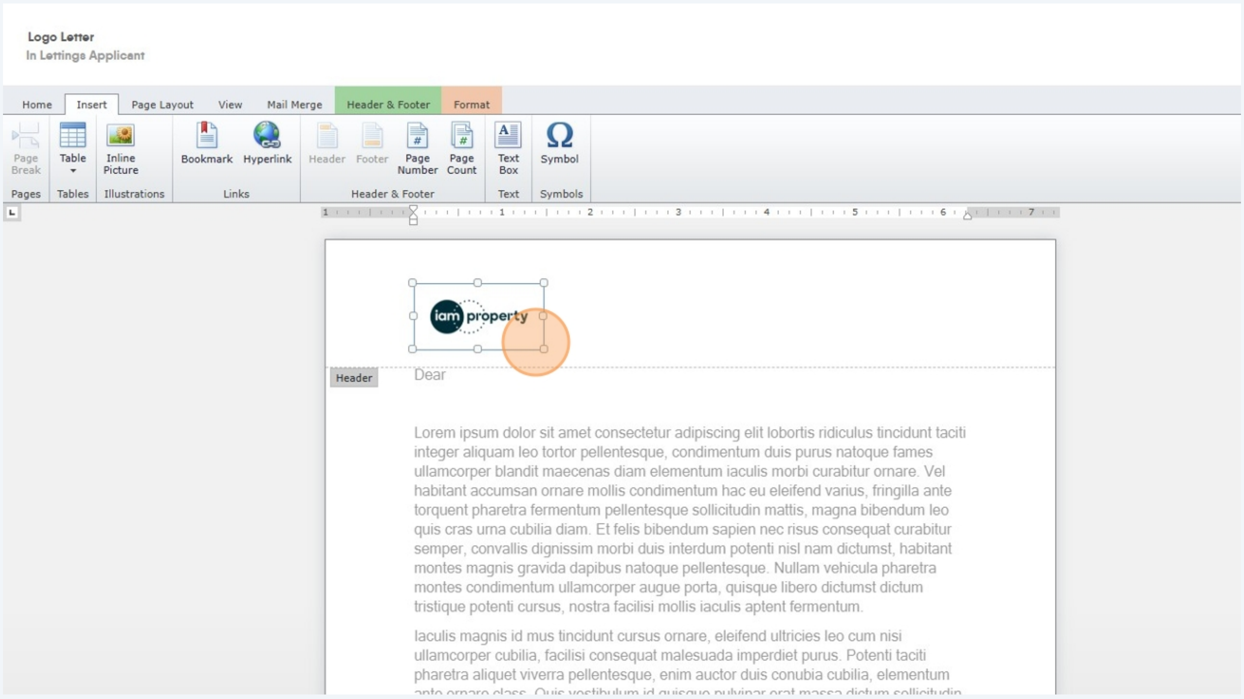
18 Click the "Browse your computer for the image file to upload:" field.



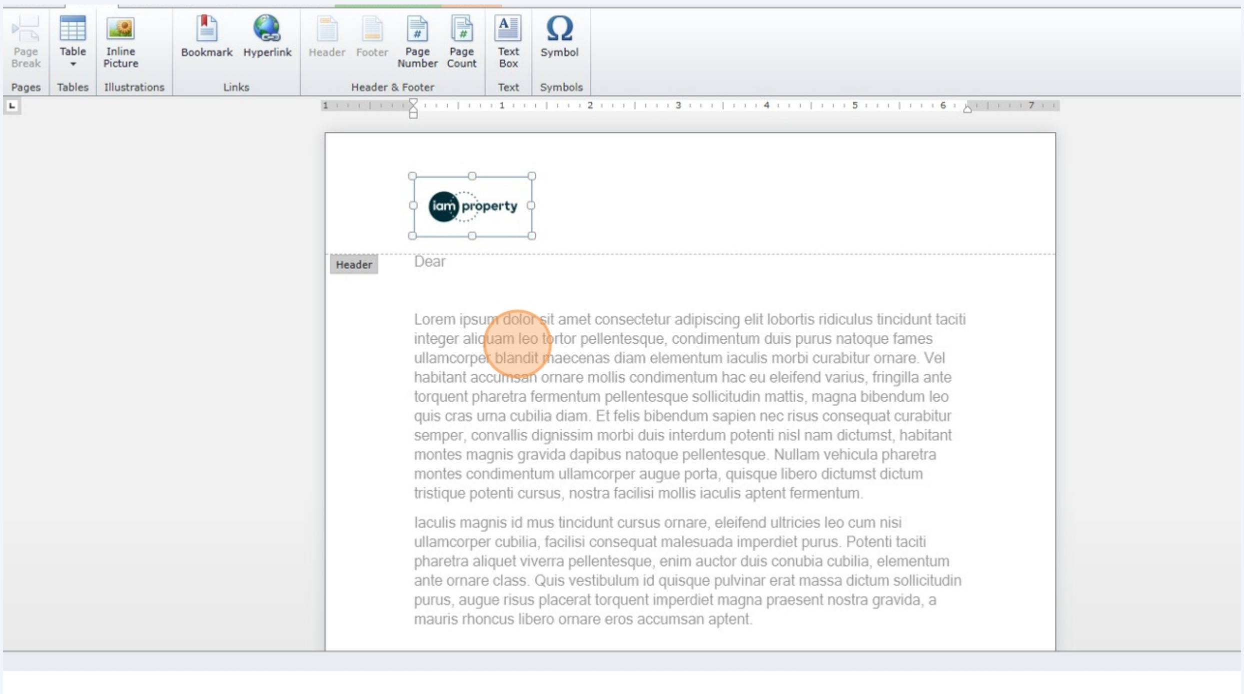
19 Once the image is found. Click "OK"



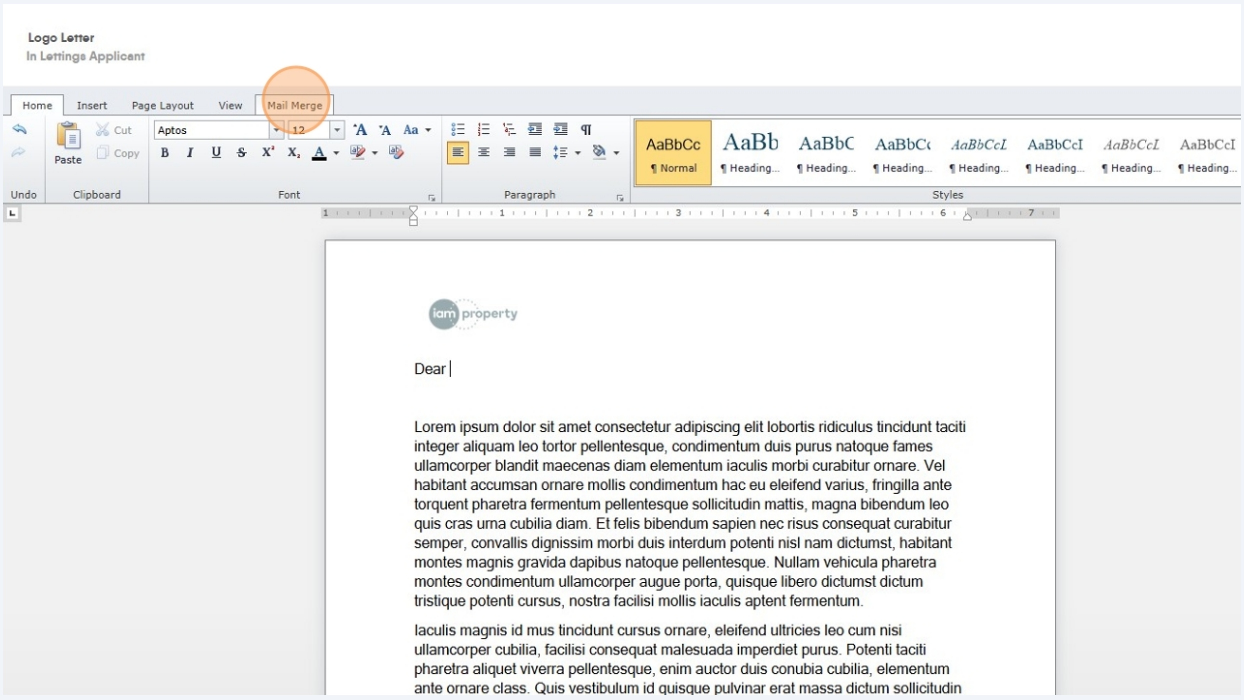
20 Your image will load, click onto it and use the options to re-size the image to fit your document. Click here.



21 Click onto the main field of your letter to close the Header and set the image.



22 Click "Mail Merge"



23 Click "Save this Letter"