

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.

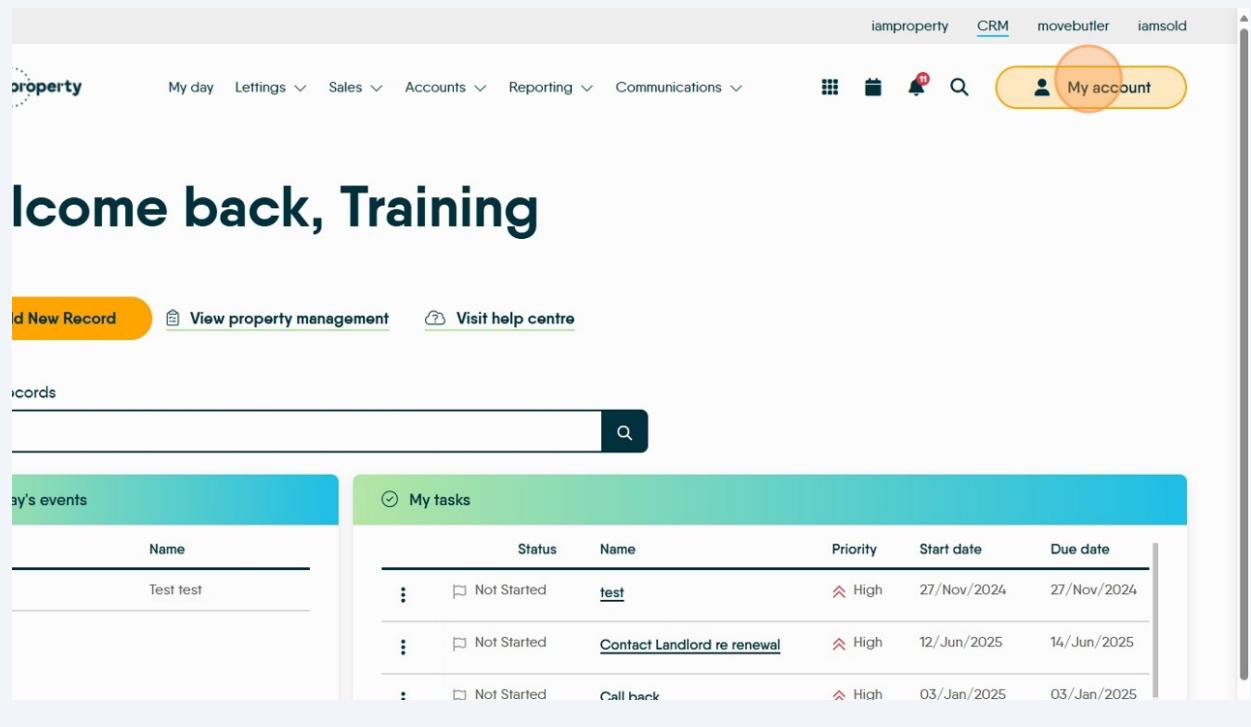
- 2 Navigate to <https://crm.iamproperty.com/MyDay>

A screenshot of the iam property CRM interface. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and a search bar. Below the navigation is a 'Welcome back, Training' message. On the left, there are buttons for '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar with the placeholder 'Search all records' is also present. The main content area is divided into two sections: 'Today's events' (listing a single item: '12:00 Test test') and 'My tasks' (listing four tasks: 'test', 'Contact Landlord re renewal', 'Call back', and 'Make Tea', each with a status of 'Not Started', priority 'High', and specific dates).

Time	Name
12:00	Test test

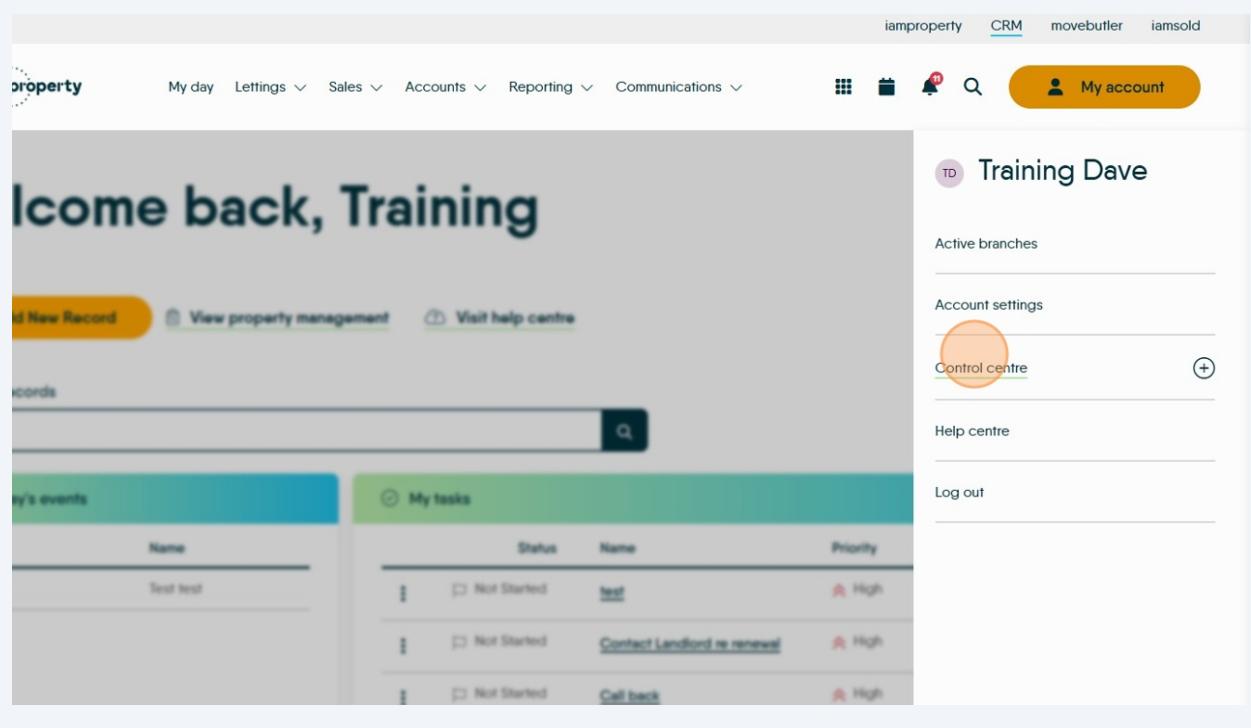
Status	Name	Priority	Start date	Due date
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Contact Landlord re renewal	High	12/Jun/2025	14/Jun/2025
Not Started	Call back	High	03/Jan/2025	03/Jan/2025
Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

3 Click "My account"



The screenshot shows the iProperty software interface. At the top, there is a navigation bar with links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. On the right side of the top bar, there are icons for a grid, a calendar, a bell with a notification count of 11, a magnifying glass, and a user profile. The 'My account' button is highlighted with an orange circle. Below the top bar, the main content area has a title 'Income back, Training' and several buttons: 'Add New Record', 'View property management', and 'Visit help centre'. There is also a search bar. The main content area is divided into sections: 'My events' (with a table showing 'Test test') and 'My tasks' (with a table showing three tasks: 'test' (High priority, due 27/Nov/2024), 'Contact Landlord re renewal' (High priority, due 14/Jun/2025), and 'Call back' (High priority, due 03/Jan/2025)).

4 Click "Control centre"



The screenshot shows the iProperty software interface, similar to the previous one but with a different sidebar. The top navigation bar and main content area are identical. The sidebar on the right is titled 'Training Dave' and contains the following sections: 'Active branches' (empty), 'Account settings' (with a 'Control centre' button highlighted with an orange circle), 'Help centre' (empty), and 'Log out' (empty). The 'Control centre' button is also highlighted with an orange circle.

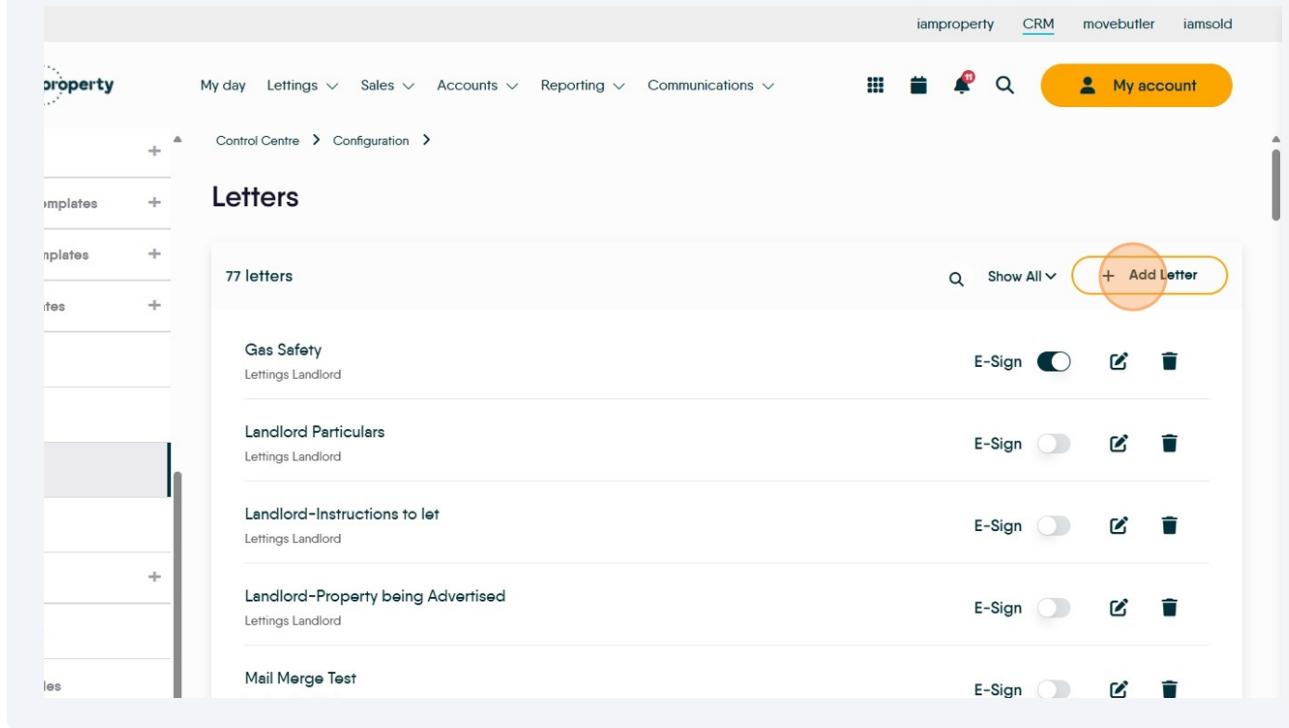
5 Click "Configuration"

The screenshot shows a software interface with a top navigation bar featuring 'New Record', 'View property management', and 'Visit help centre'. Below this is a search bar and a sidebar with the user 'Training Dave'. The sidebar includes links for 'Active branches', 'Account settings', 'Control centre' (which is highlighted with a blue underline and has a minus sign icon), 'Dashboard', 'Users', 'Configuration' (which is circled in orange), 'Branches', 'Company', 'Property Management Settings', and 'Help centre'. The main content area is titled 'Income back, Training' and shows a 'My tasks' list with five items: 'test' (Status: Not Started, Priority: High), 'Contact Landlord re renewal' (Status: Not Started, Priority: High), 'Call back' (Status: Not Started, Priority: High), 'Make Tea' (Status: Not Started, Priority: High), and 'Clean Windows' (Status: Not Started, Priority: High). A 'records' section is also visible on the left.

6 Scroll down and Click "Letters"

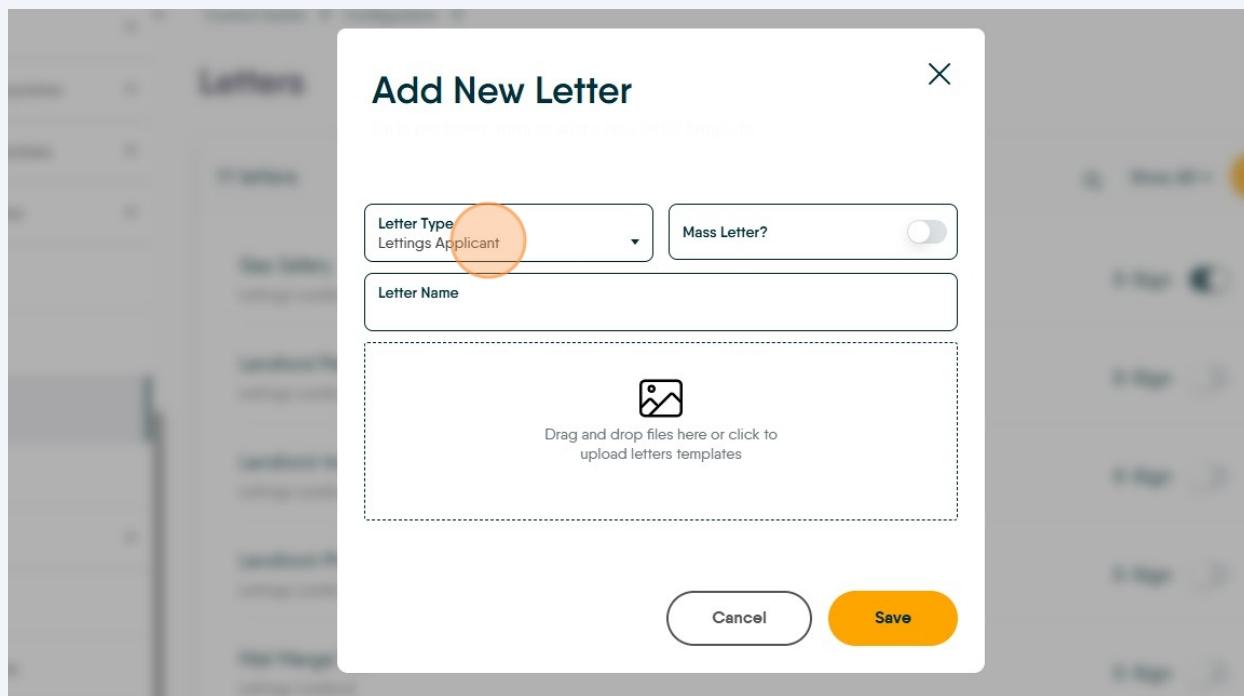
The screenshot shows the 'Configuration' screen with a sidebar on the left containing 'Reports', 'Matching Templates', 'Viewing Templates', 'MOS Templates', 'SMTP', 'SMS', 'Letters' (which is circled in orange), 'E-Sign', 'Portals', 'User Log In', 'Security Roles', 'Property Management', and 'Referencing Checks'. The main content area is titled 'General settings' and includes sections for 'Gdpr - contact preferences', 'Applicant matching defaults', and 'Landlord portal'. In the 'Gdpr - contact preferences' section, there are two columns of toggle switches: the left column includes 'Use Defaults', 'Email', 'SMS', and 'Third Party'; the right column includes 'Do Not Contact', 'Letter', 'Phone', and 'Allow Marketing'. In the 'Applicant matching defaults' section, there is a single toggle switch for 'Matching Area'. In the 'Landlord portal' section, there is a single toggle switch for 'Restrict Landlord Portal'.

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



The screenshot shows the 'Letters' section of a software interface. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'Control Centre', and 'Configuration'. On the right, there are icons for 'iamproperty', 'CRM', 'movebutler', 'iamsold', and 'My account'. Below the navigation, the page title is 'Letters' with a subtitle '77 letters'. A search bar and a 'Show All' dropdown are on the right. The main area lists five sample letters: 'Gas Safety', 'Landlord Particulars', 'Landlord-Instructions to let', 'Landlord-Property being Advertised', and 'Mail Merge Test'. Each letter entry includes an 'E-Sign' toggle switch, a pencil icon for editing, and a trash can icon for deletion.

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



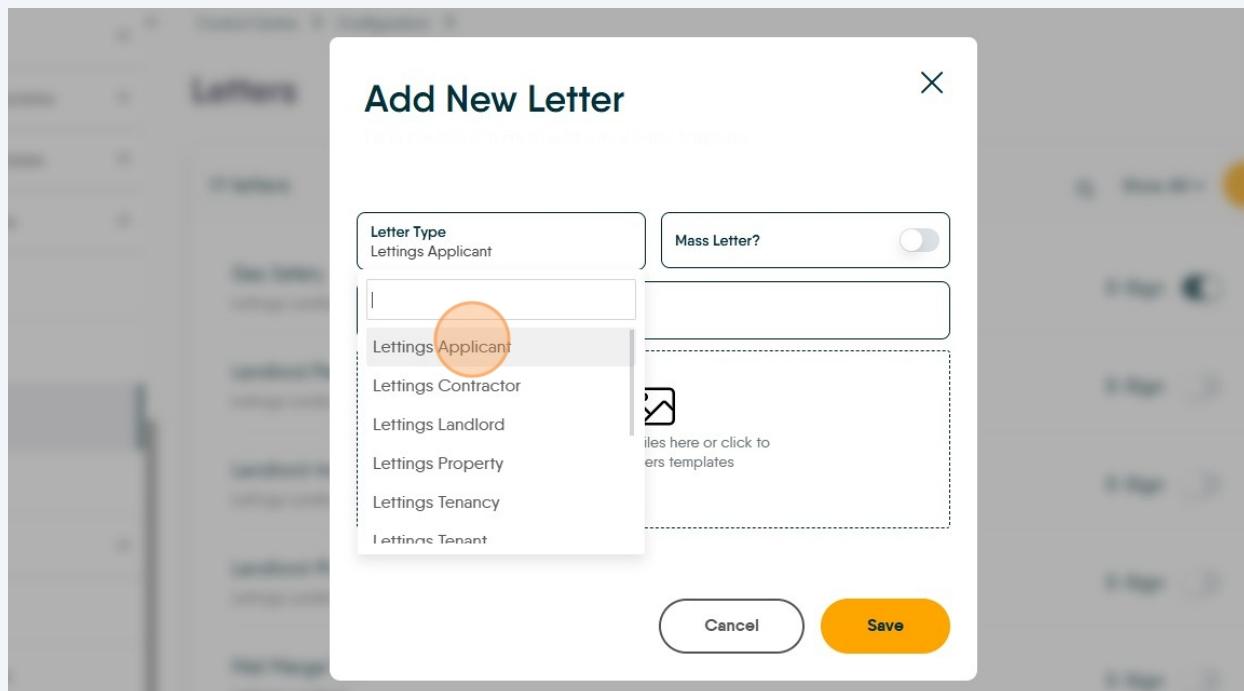
The screenshot shows the 'Add New Letter' dialog box. It has a title 'Add New Letter' and a close button 'X'. Below the title, there is a note: 'Select the letter type and recipient you are creating the letter for.' The 'Letter Type' dropdown is set to 'Lettings Applicant' and is highlighted with an orange circle. To its right is a 'Mass Letter?' toggle switch, which is turned off. Below the dropdown is a 'Letter Name' input field. At the bottom of the dialog is a dashed box for 'Drag and drop files here or click to upload letters templates', with a small image icon inside. At the very bottom are 'Cancel' and 'Save' buttons, with 'Save' being highlighted with an orange circle.



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.

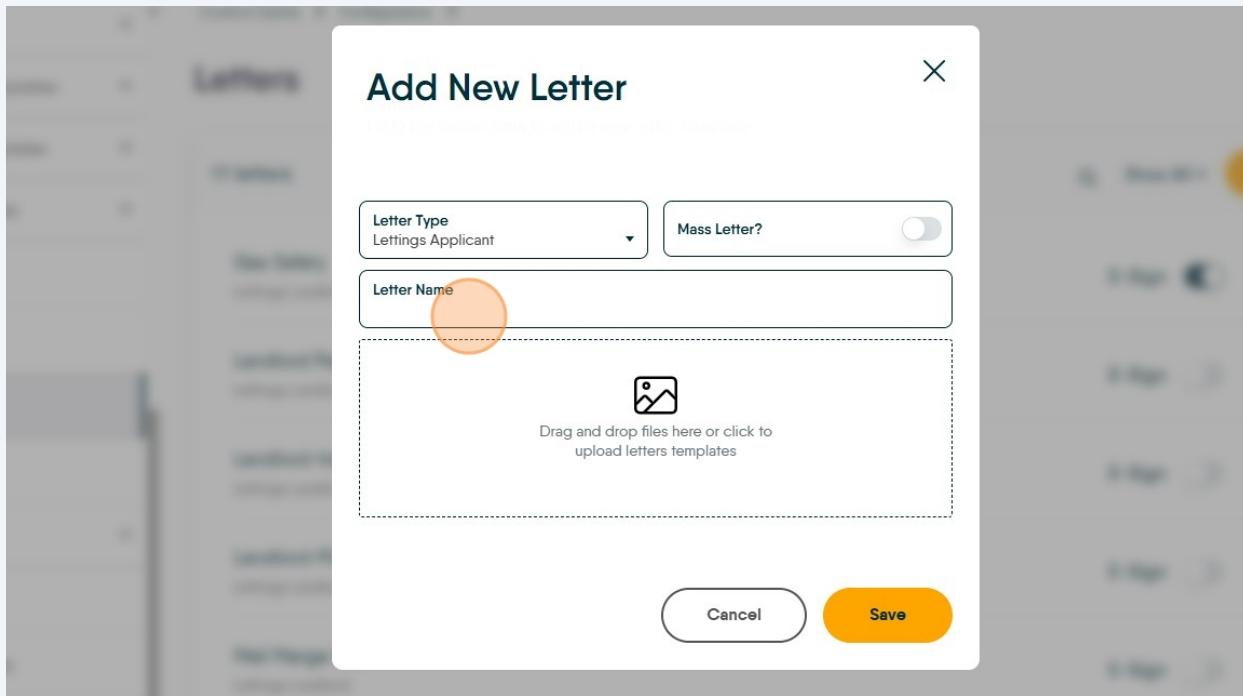
9

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



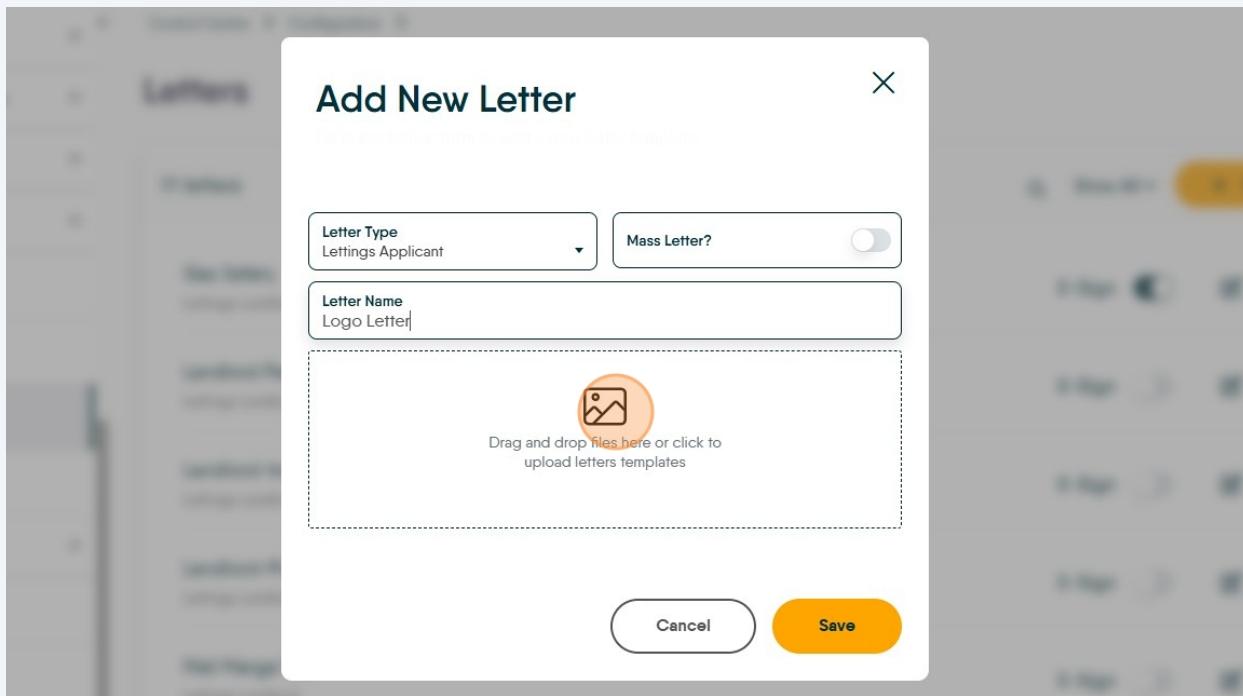
10

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

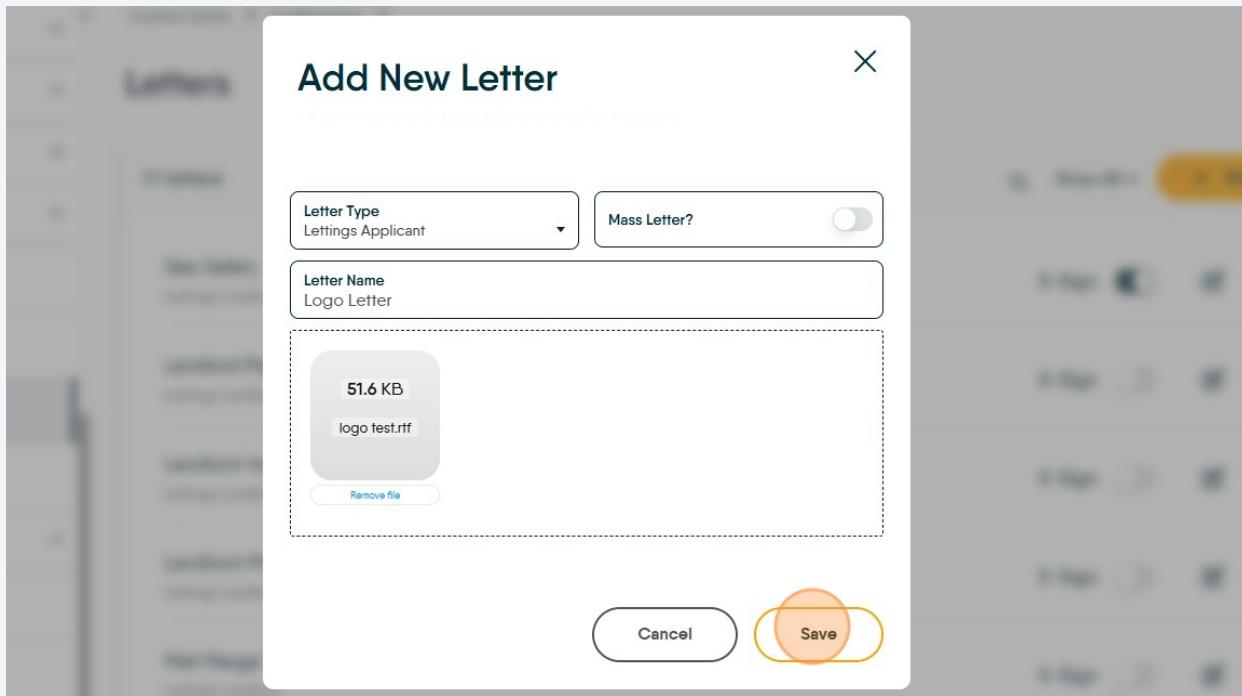


11

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"

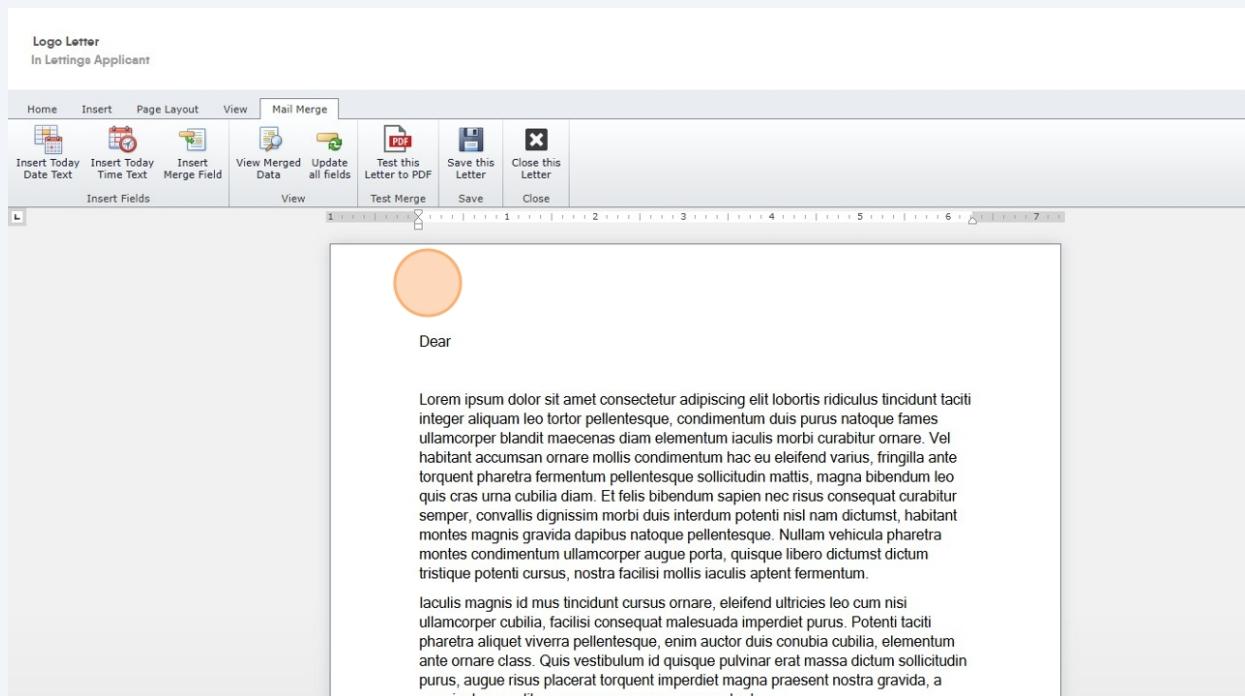


Adding the Logo

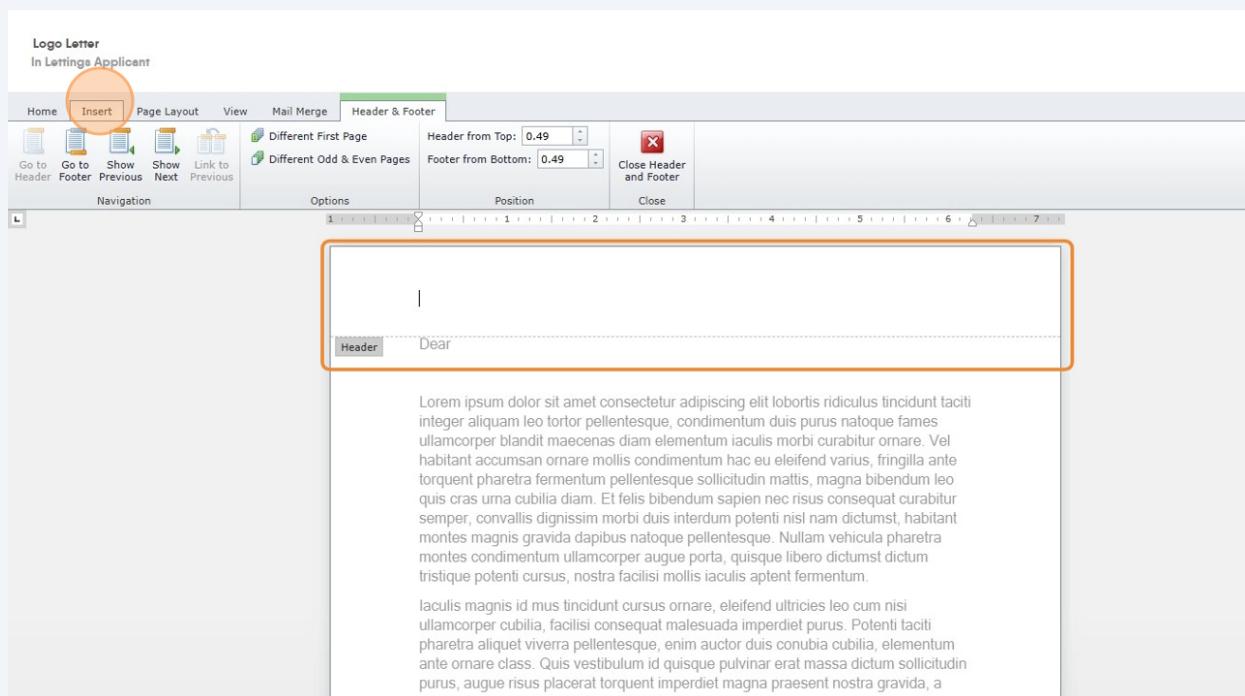
13 In the letters menu of CRM scroll to find the letter you have just added, it will most likely be at the end of the list. Click here to open the editor.

Letter Type	Actions
Sales Offer	
Sales Offer Rejection	
Standard Memorandum of Sale	
Standard Offer Accepted - Letter to Purchaser	
Standard Offer Accepted - Letter to Vendor Solicitor	
Standard Offer Accepted - Letter to Vendor	
Confirmation of Sale	
Logo Letter	

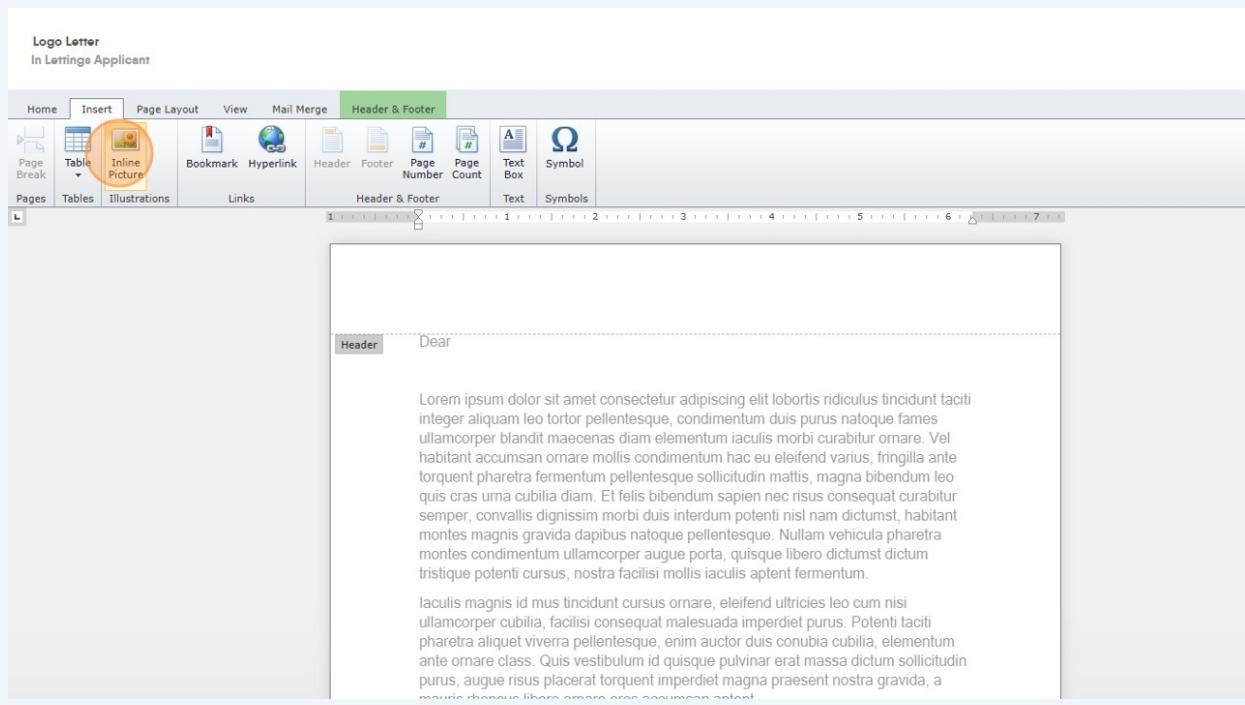
14 Double-click at the top of the screen to open the 'Header' of your document.



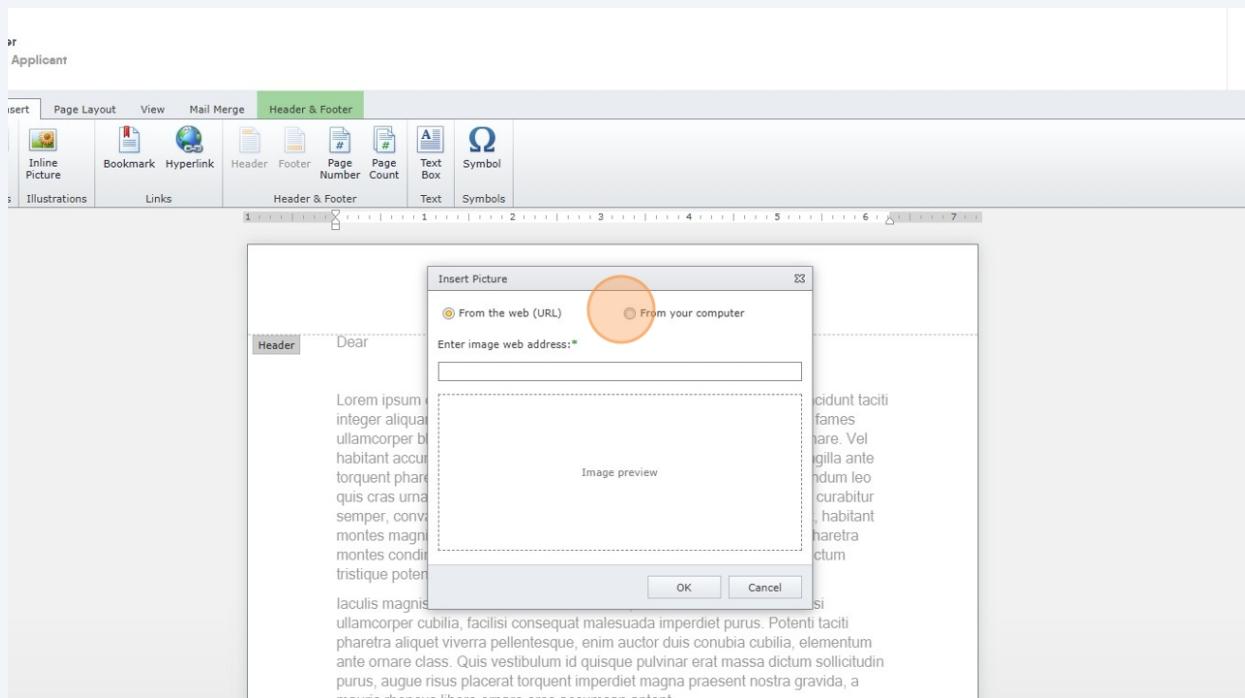
15 Click "Insert"



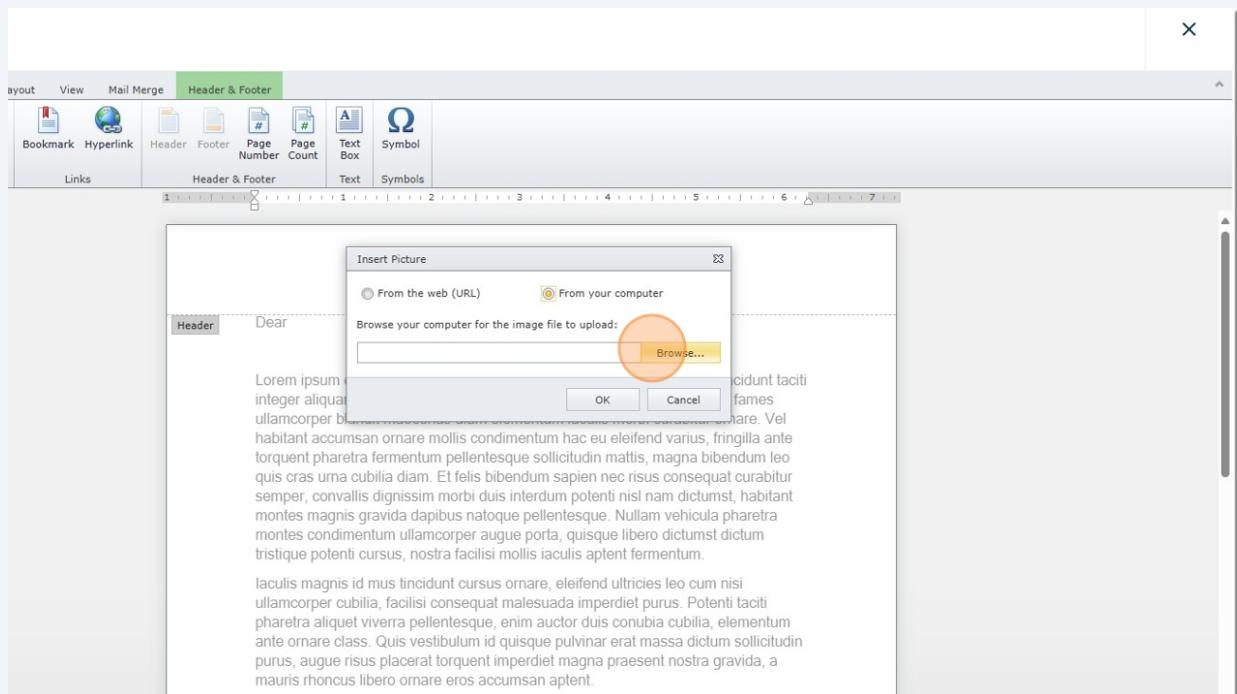
16 Click "Inline Picture"



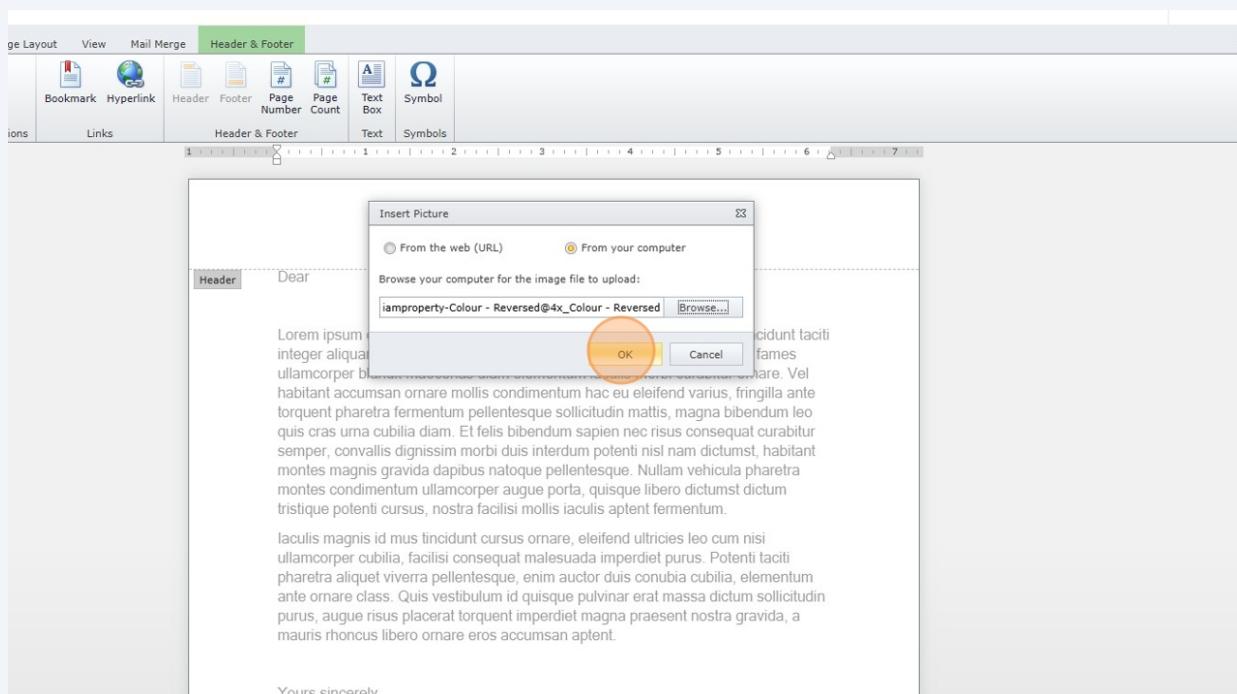
17 In the 'Insert Picture' section you can link to an image on the internet or (most likely) find an image on your computer and link to that.



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

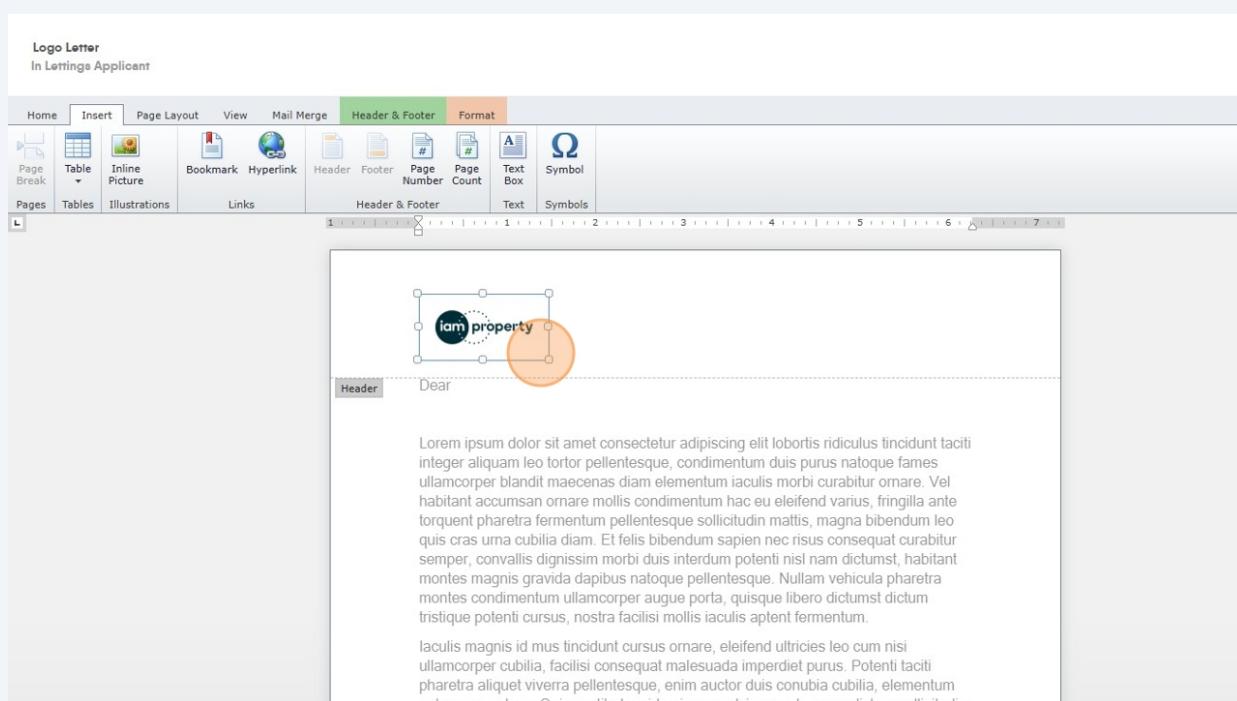


19 Once the image is found. Click "OK"

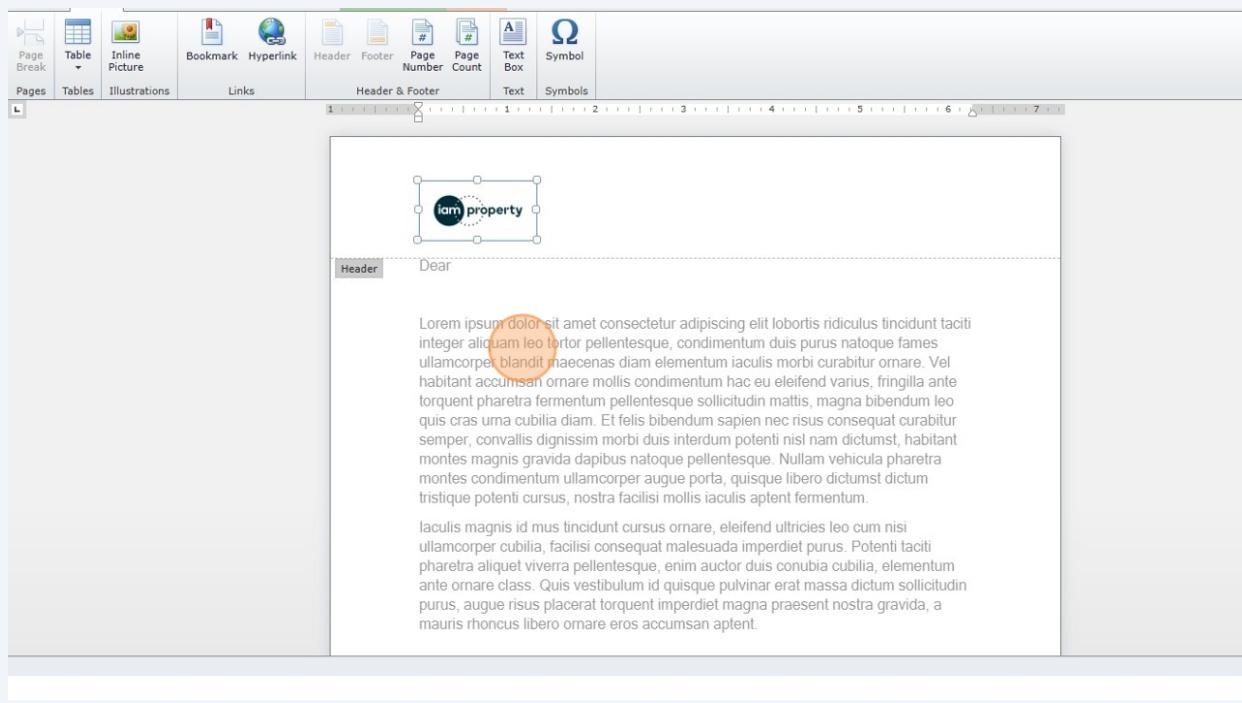


20

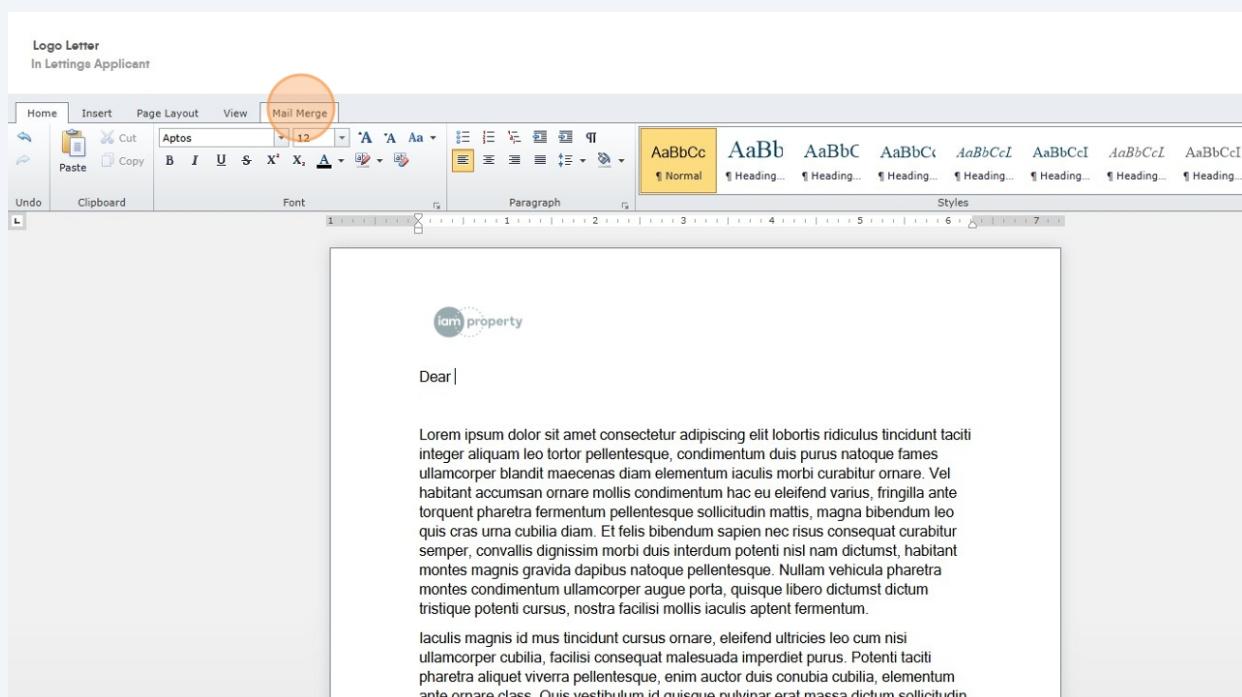
Your image will load, click onto it and use the options to re-size the image to fit your document. Click here.



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"

