

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>

iam property

My day Lettings Sales Accounts Reporting Communications

My account

Welcome back, Training

+ Add New Record

View property management

Visit help centre

Search all records

Today's events

Time	Name
12:00	Test test

My tasks

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"

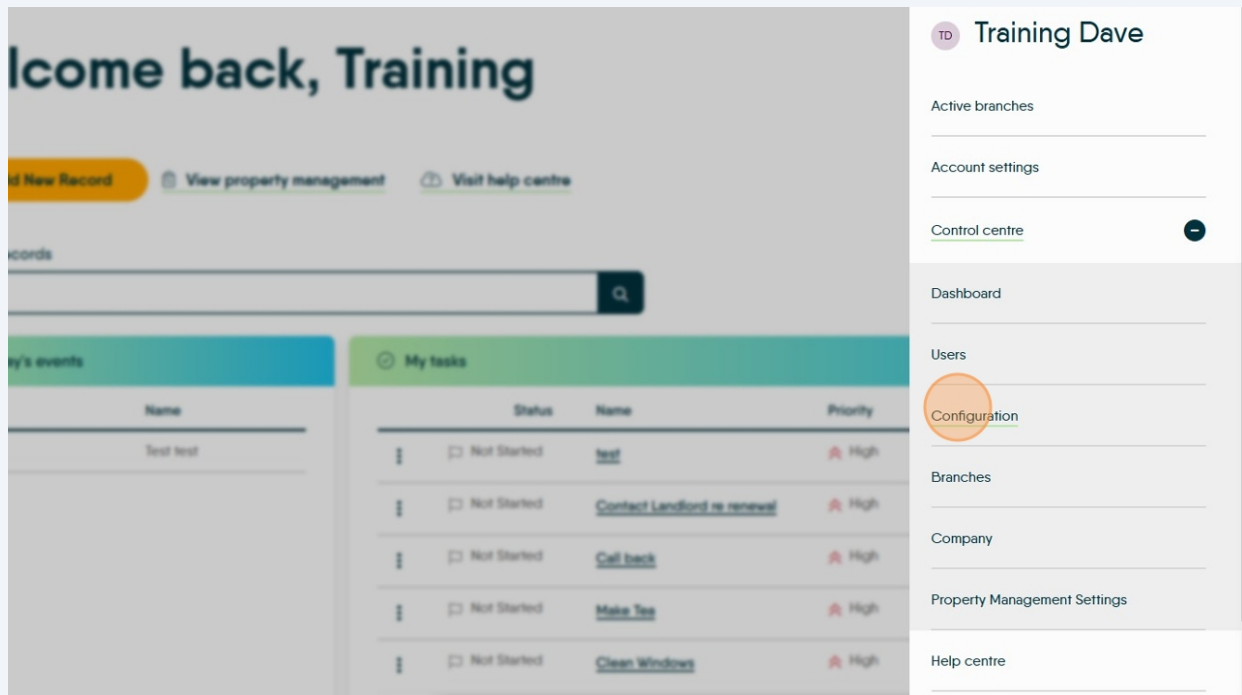
The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes links for iamproperty, CRM, movebutler, and iamsold. Below this is a secondary navigation bar with links for My day, Lettings, Sales, Accounts, Reporting, and Communications. On the right side of this bar, there is a 'My account' button with a user icon, which is highlighted with an orange circle. The main content area displays a welcome message 'I come back, Training' and a 'Add New Record' button. Below these are links for 'View property management' and 'Visit help centre'. A search bar is present, and the bottom section contains two tables: 'My events' and 'My tasks'.

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

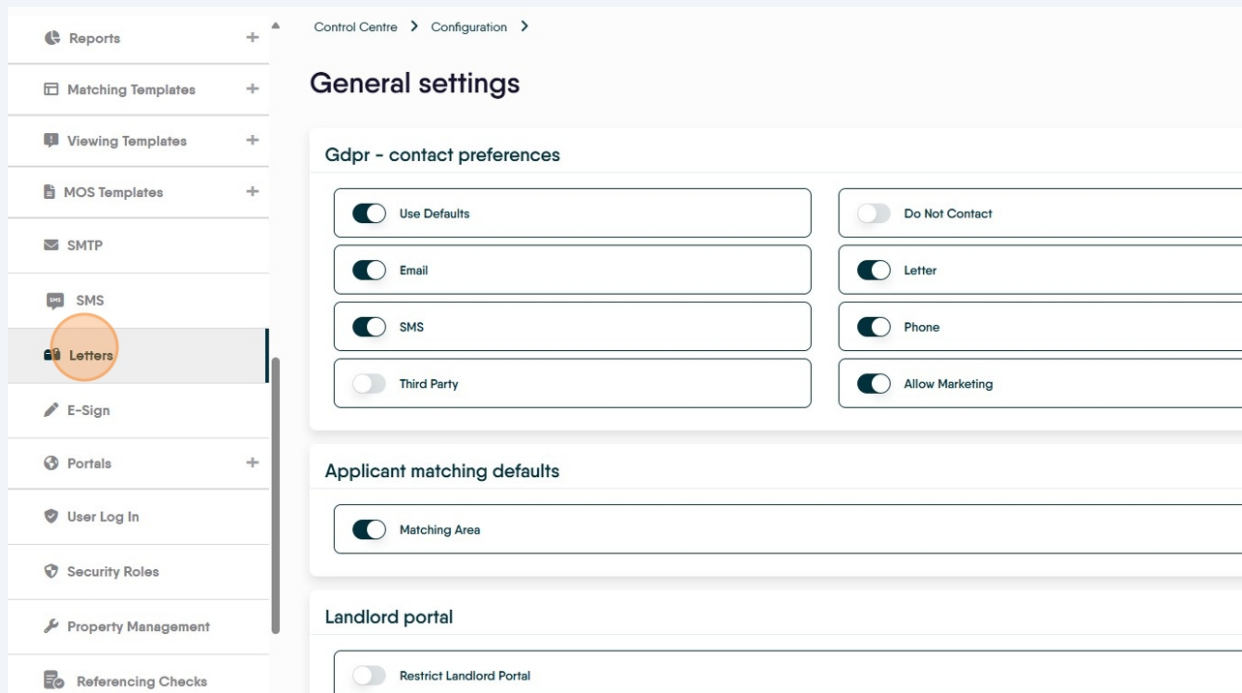
4 Click "Control centre"

The screenshot shows the iamproperty CRM dashboard with the 'Control centre' option highlighted in the right-hand sidebar. The sidebar is titled 'Training Dave' and contains several sections: 'Active branches', 'Account settings', 'Control centre' (highlighted with an orange circle and a plus icon), 'Help centre', and 'Log out'. The main content area is partially visible, showing the same dashboard elements as in the previous screenshot.

5 Click "Configuration"

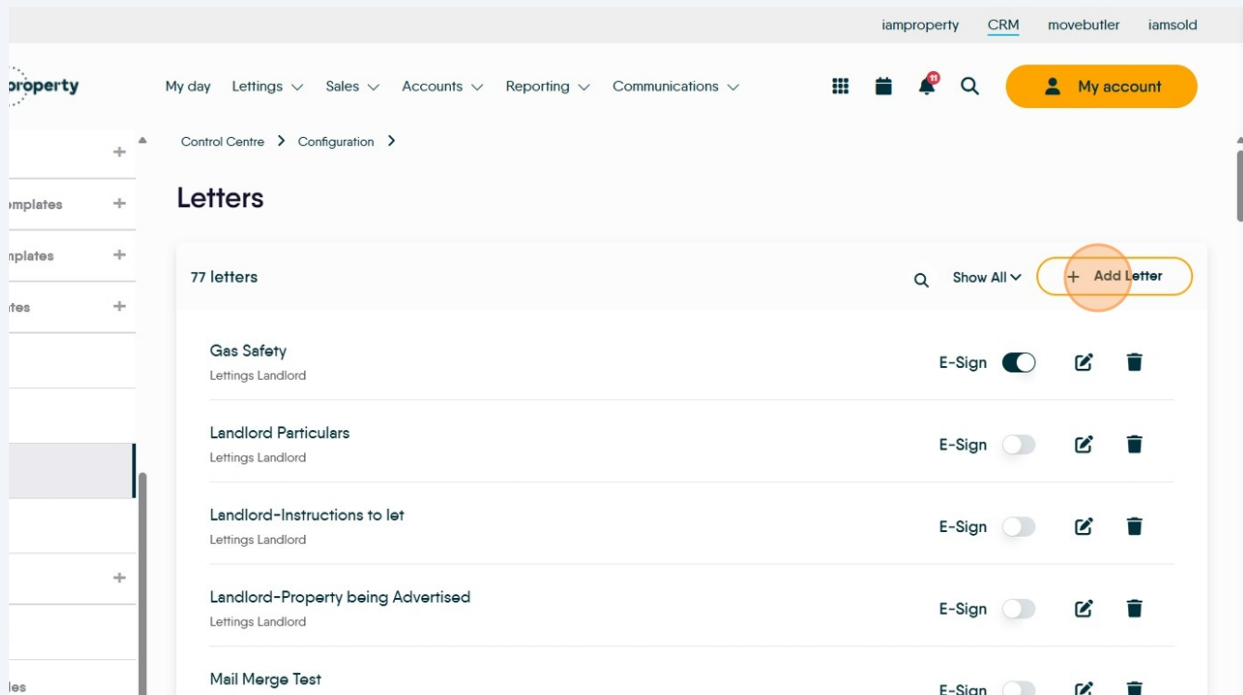


6 Scroll down and Click "Letters"



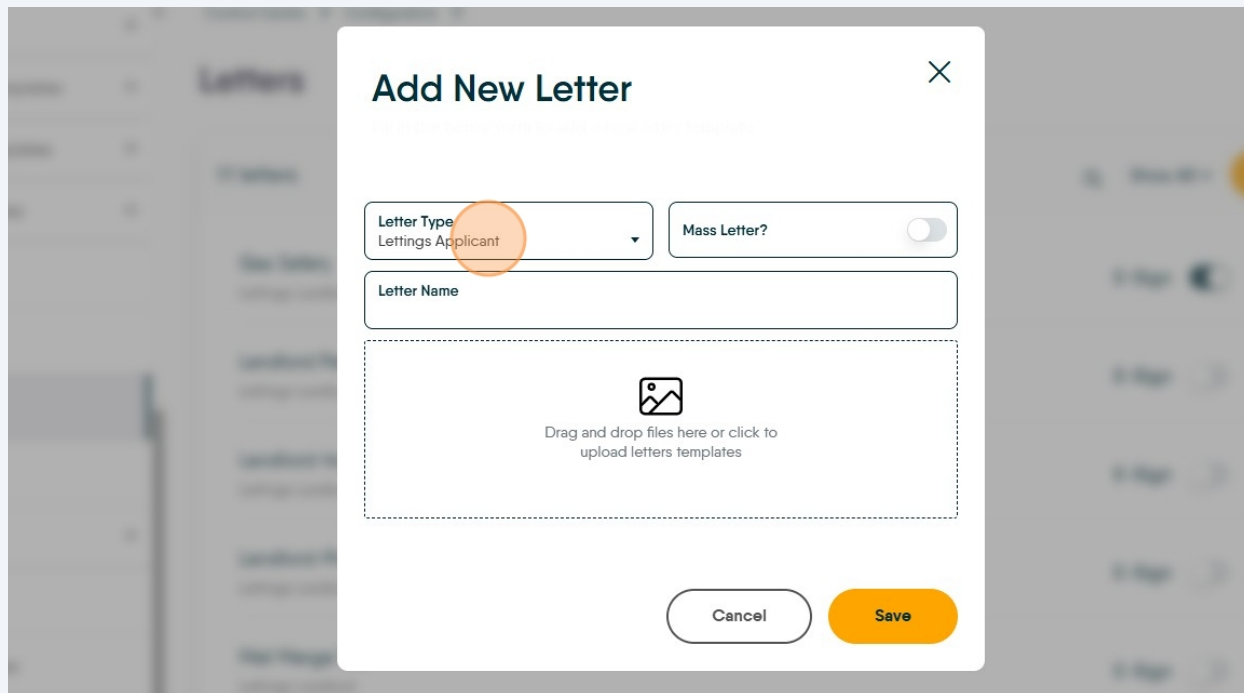
7

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.


Add New Letter ✕

Click to select a letter type from the dropdown menu to create a new letter.

Letter Type
Lettings Applicant

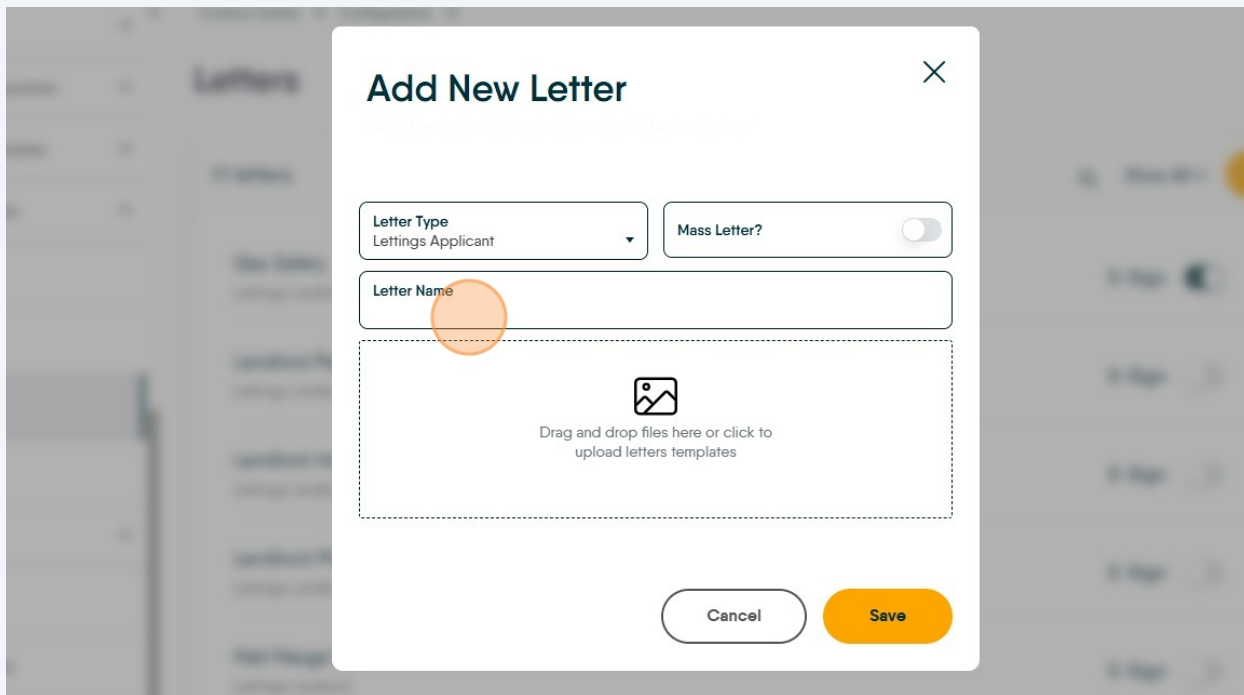
Mass Letter? ☐

Lettings Applicant
Lettings Contractor
Lettings Landlord
Lettings Property
Lettings Tenancy
Lettings Tenant

 Click to upload files here or click to select from templates

10

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

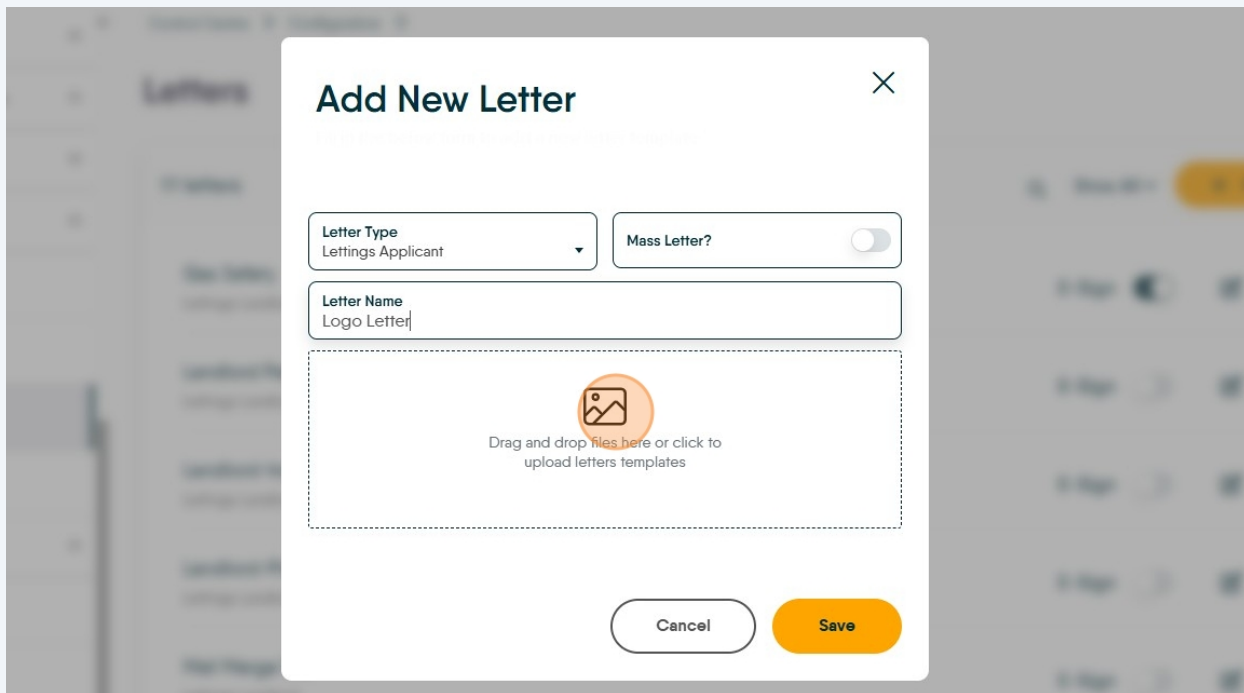


The screenshot shows a modal window titled "Add New Letter" with a close button (X) in the top right corner. Below the title is a subtitle: "This is the name that will be used to identify this letter in the CRM." The form contains the following elements:

- Letter Type:** A dropdown menu currently showing "Lettings Applicant".
- Mass Letter?:** A toggle switch that is currently turned off.
- Letter Name:** A text input field, which is highlighted with an orange circle.
- Image Upload Area:** A dashed rectangular box containing a small image icon and the text: "Drag and drop files here or click to upload letters templates".
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

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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.



This screenshot shows the same "Add New Letter" modal window, but with updates:

- The **Letter Name** field now contains the text "Logo Letter".
- The **Image Upload Area** (dashed box) is now highlighted with an orange circle.
- The text inside the dashed box has been updated to: "Drag and drop files here or click to upload letters templates".
- The **Letter Type** dropdown and **Mass Letter?** toggle remain unchanged.
- The **Buttons** ("Cancel" and "Save") are still at the bottom right.

- 12 Once your document is added click "Save"

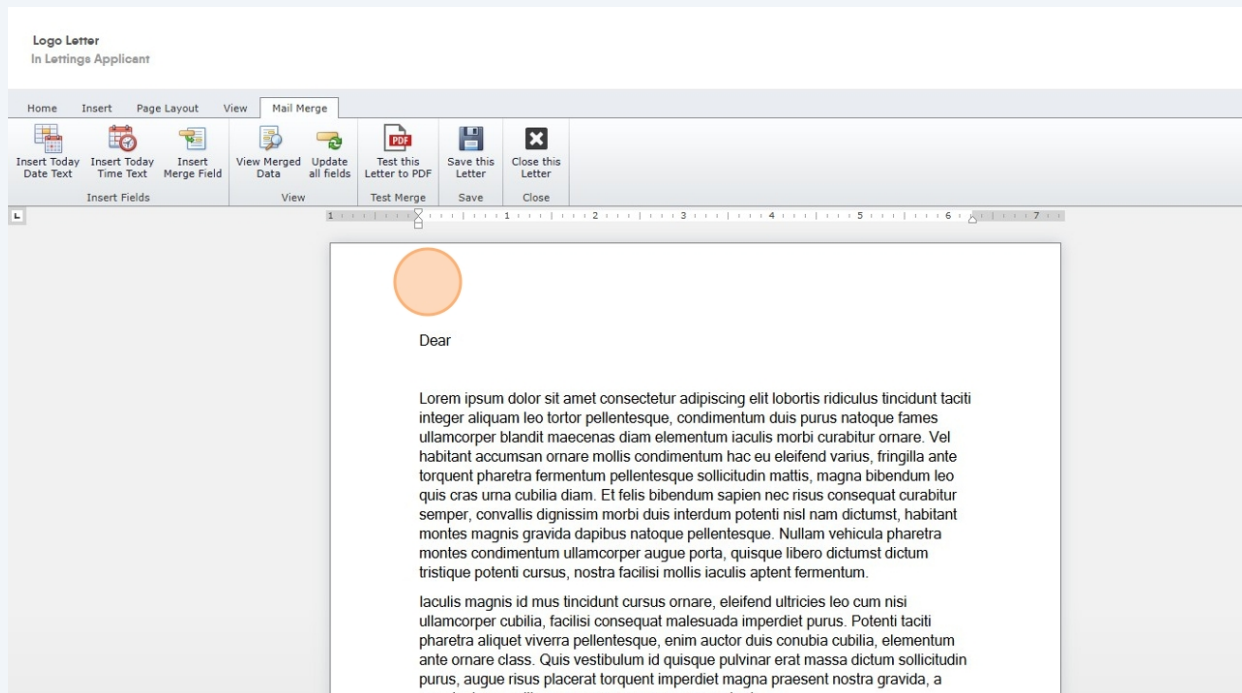
The screenshot shows a modal window titled "Add New Letter" with a close button (X) in the top right corner. Inside the modal, there is a "Letter Type" dropdown menu set to "Lettings Applicant", a "Mass Letter?" toggle switch, and a "Letter Name" text field containing "Logo Letter". Below these fields is a dashed box representing a file upload area, which contains a file named "logo test.rtf" with a size of "51.6 KB" and a "Remove file" button. At the bottom of the modal are "Cancel" and "Save" buttons. The "Save" button is highlighted with an orange circle.

Adding the Logo

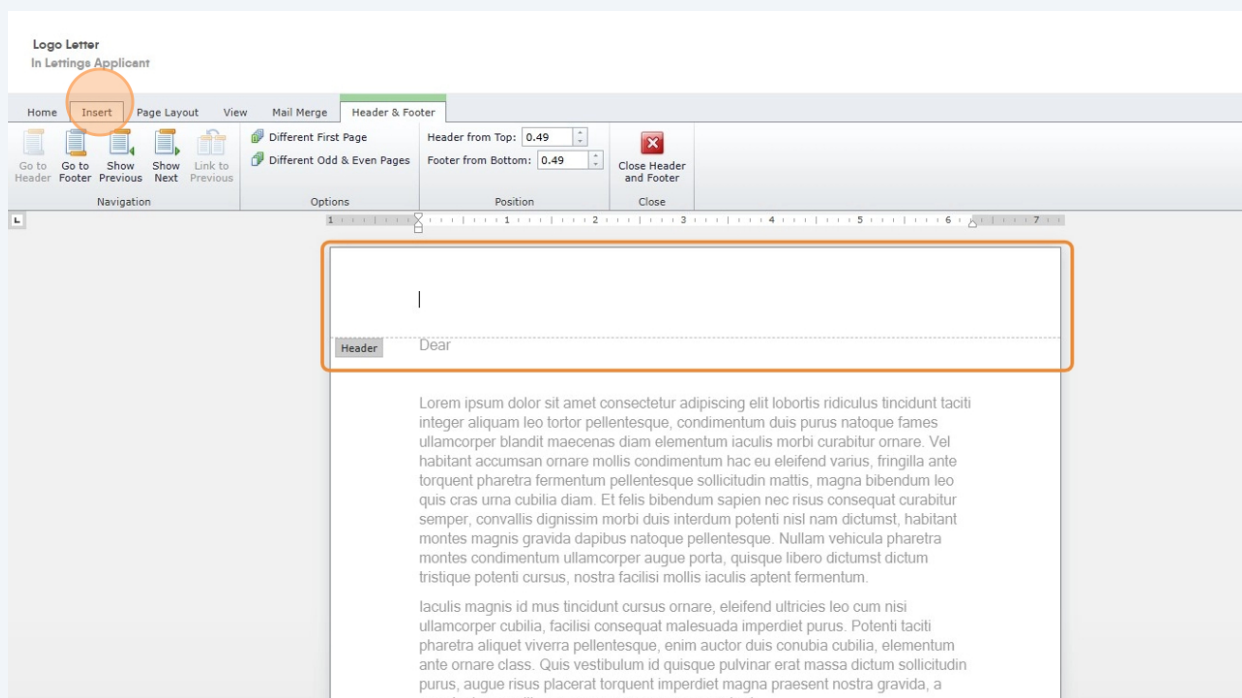
- 13 In the letters menu of CRM scroll to find the letter you have just added, it will most likely be at the end of the list. Click here to open the editor.

The screenshot shows a list of letters in a CRM system. The list includes items like "Sales Offer Rejection", "Standard Memorandum of Sale", "Standard Offer Accepted - Letter to Purchasor", "Standard Offer Accepted - Letter to Vendor Solicitor", "Standard Offer Accepted - Letter to Vendor", and "Confirmation of Sale". Each item has an "E-Sign" toggle and edit/delete icons. The "Logo Letter" entry at the bottom is highlighted with an orange circle, and a tooltip "Edit and produce the letter" is visible over its edit icon.

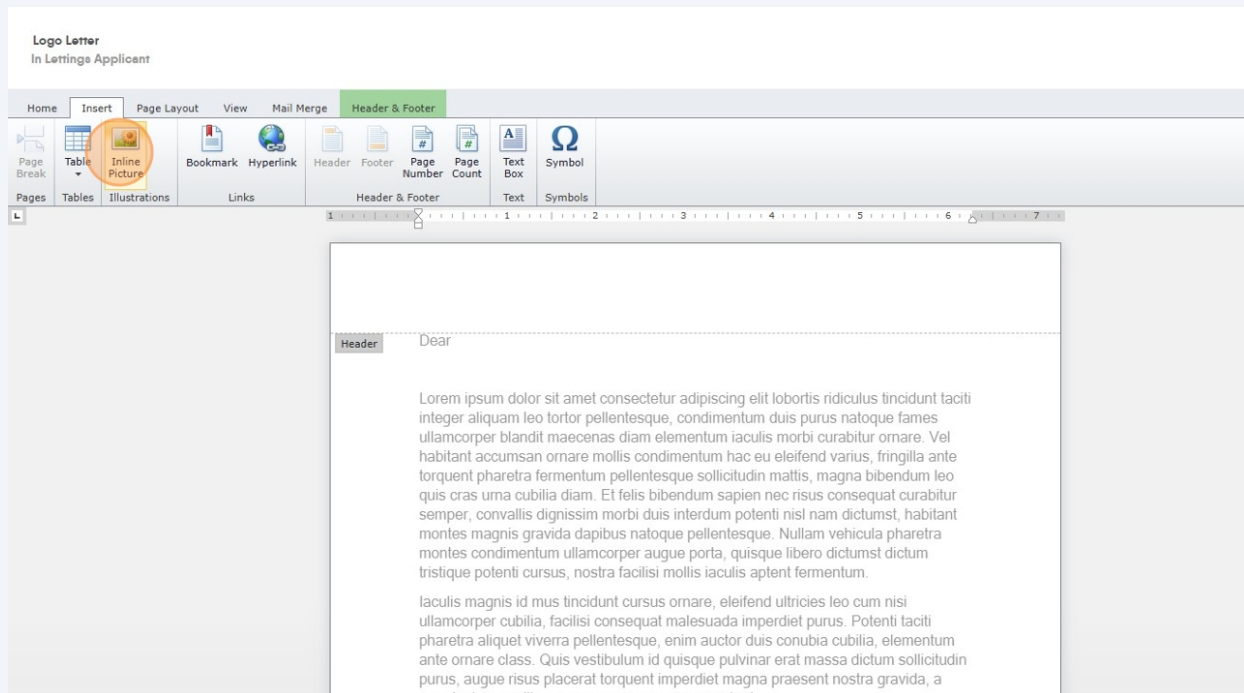
14 Double-click at the top of the screen to open the 'Header' of your document.



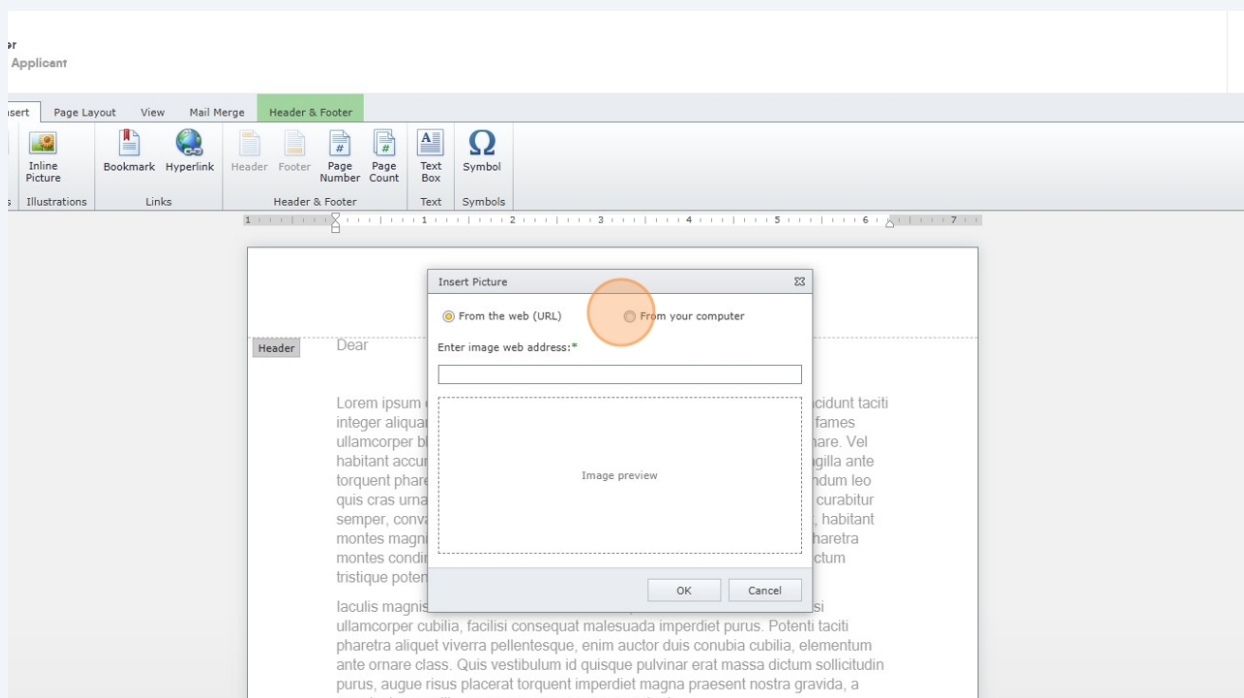
15 Click "Insert"



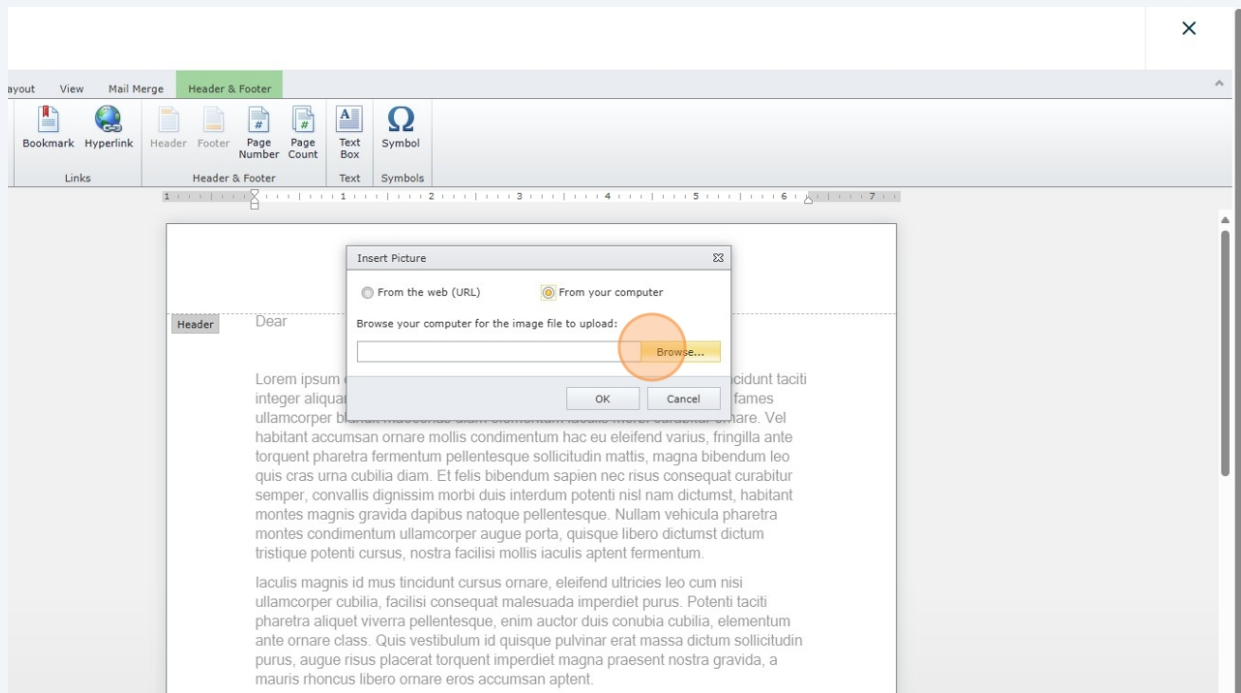
16 Click "Inline Picture"



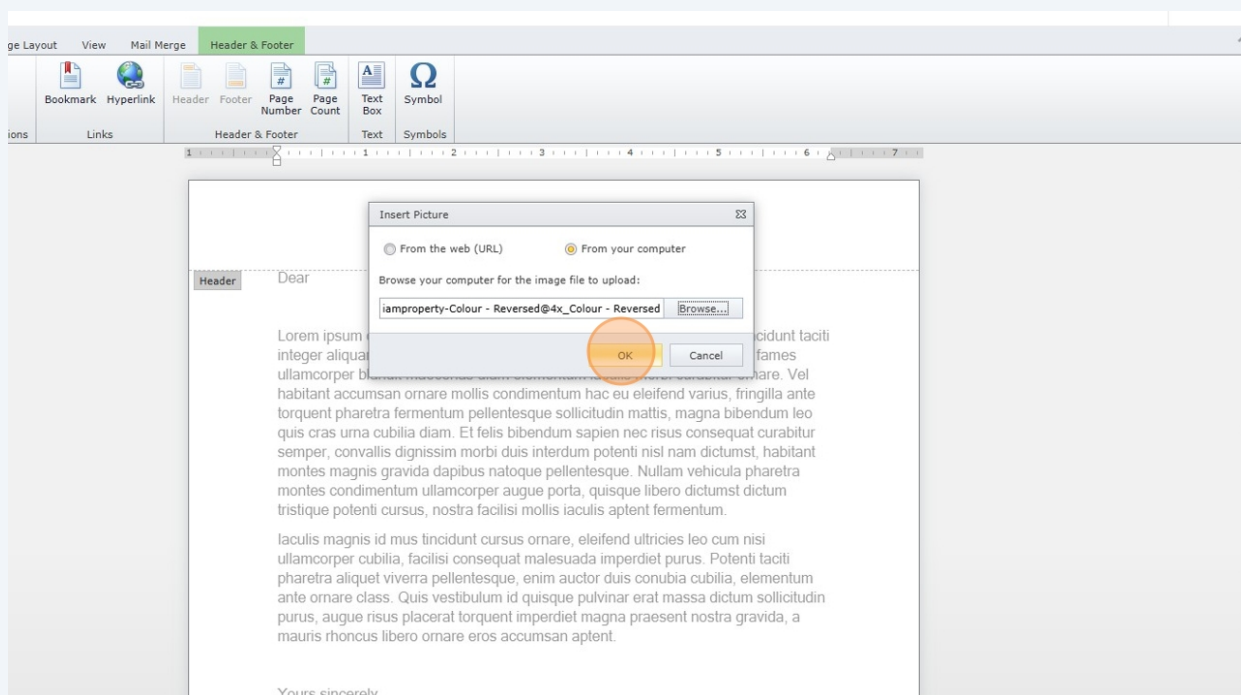
17 In the 'Insert Picture' section you can link to an image on the internet or (most likely) find an image on your computer and link to that.



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

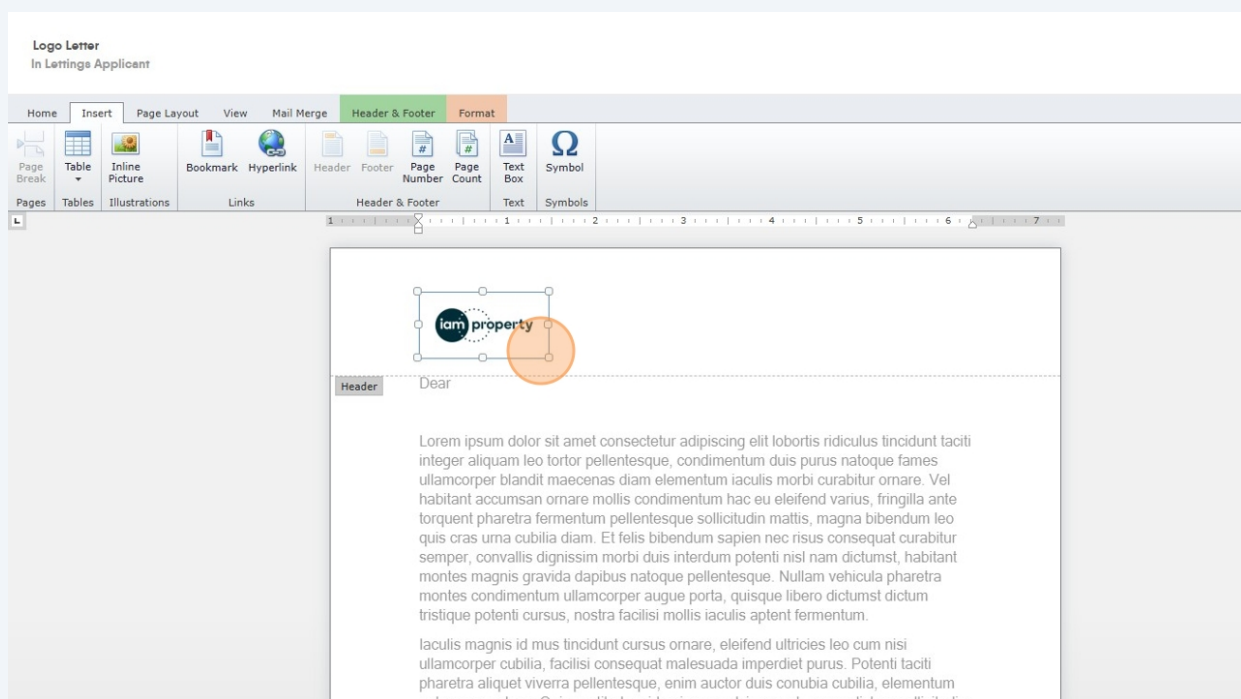


19 Once the image is found. Click "OK"

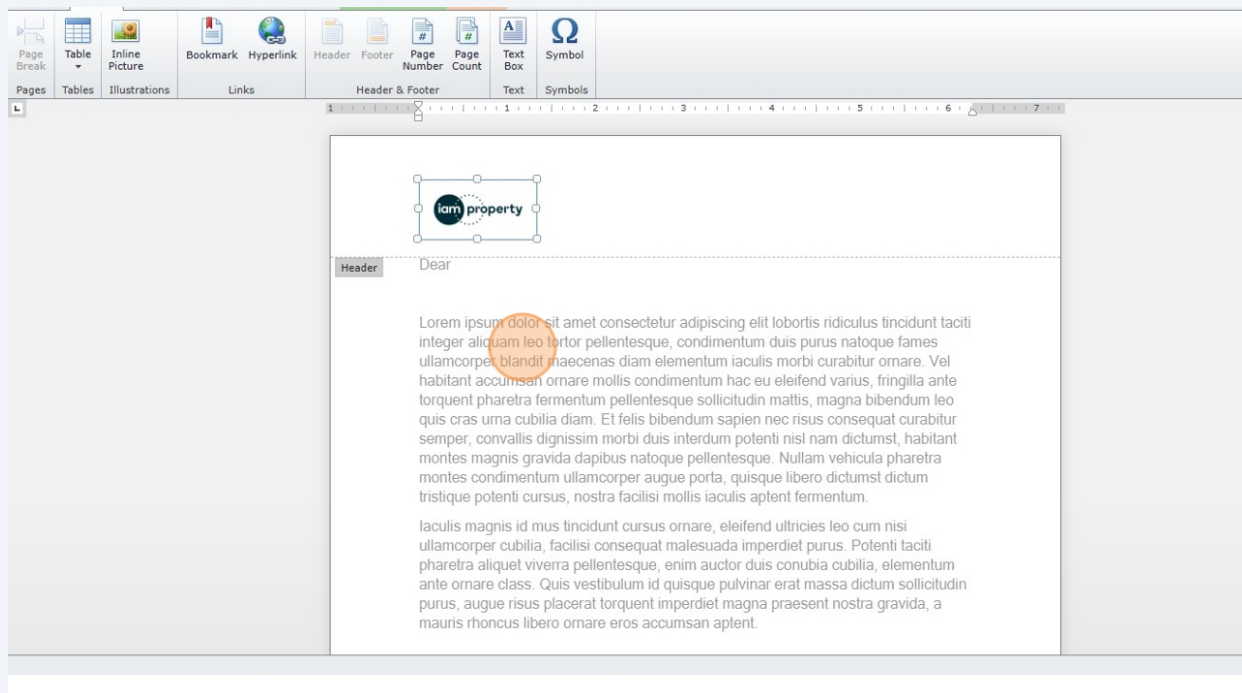


20

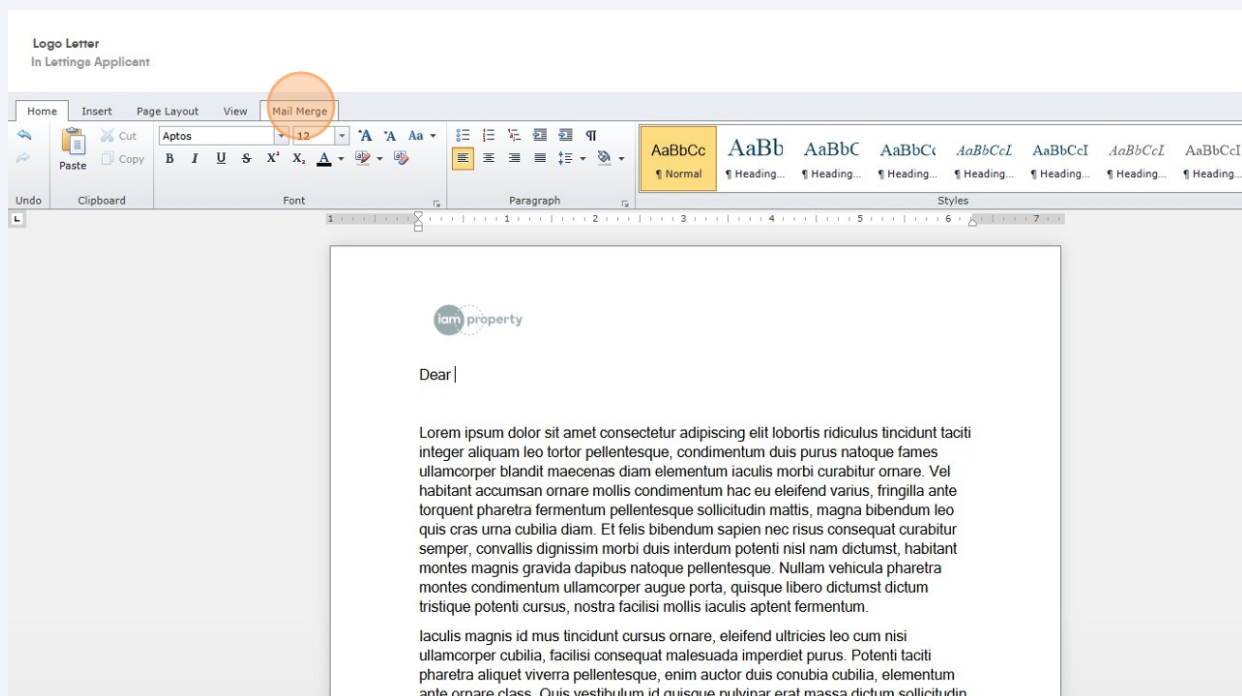
Your image will load, click onto it and use the options to re-size the image to fit your document. Click here.



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"

Logo Letter
In Lettings Applicant

Home Insert Page Layout View Mail Merge

Insert Today Date Text Insert Today Time Text Insert Merge Field View Merged Data Update all fields Test this Letter to PDF Save this Letter Close this Letter

Insert Fields View Test Merge Save Close

1 2 3 4 5

Insert Merge Field

Fields:

app

Applicant Internal Reference
Applicant Title
Applicant Forename
Applicant Surname
Applicant Initial
Applicant Salutation
Applicant Email

iam property

Dear <<ApplicantTitle>><<ApplicantForename>><<ApplicantSurname>>

Lorem ipsum dolor sit amet consectetur adipiscing elit lobortis ridiculus tin integer aliquam leo tortor pellentesque, condimentum dui purus natoque ullamcorper blandit maecenas diam elementum iaculis morbi curabitur orr habitant accumsan ornare mollis condimentum hac eu eleifend varius, frin