

# Adding a New Letter Template in CRM



This guide provides a step-by-step process for adding 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.



Alert!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.

1

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

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
<div><div></div>Not Started</div>	<u>test</u>	<div><div></div>High</div>	27/Nov/2024	27/Nov/2024
<div><div></div>Not Started</div>	<u>Contact Landlord re renewal</u>	<div><div></div>High</div>	12/Jun/2025	14/Jun/2025
<div><div></div>Not Started</div>	<u>Call back</u>	<div><div></div>High</div>	03/Jan/2025	03/Jan/2025
<div><div></div>Not Started</div>	<u>Make Tea</u>	<div><div></div>High</div>	07/Jan/2025	07/Jan/2025

1

## 2 Click "My account"

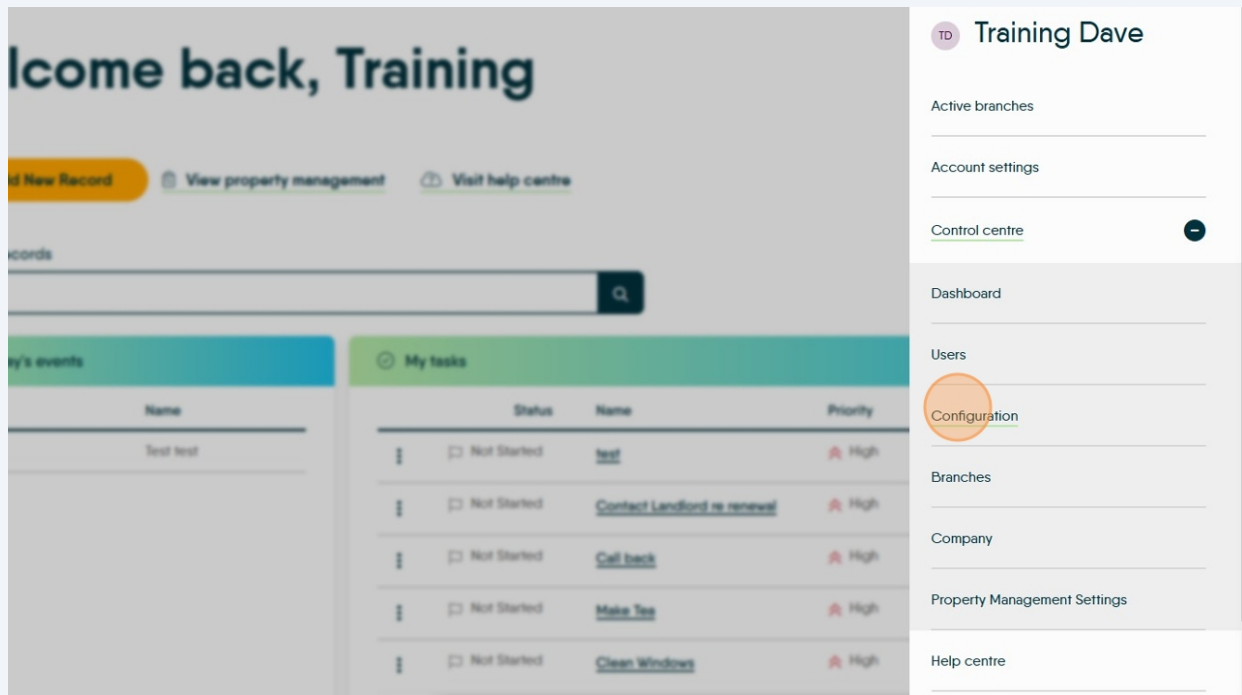
The screenshot shows the IAM Property CRM dashboard. The top navigation bar includes links for iamproperty, CRM, movebutler, and iamsold. Below this is a main navigation bar with links for My day, Lettings, Sales, Accounts, Reporting, and Communications. On the right side of the main navigation bar, there is a 'My account' button, which is highlighted with an orange circle. The dashboard content area features a large heading 'I come back, Training' and a 'New Record' button. Below these are links for 'View property management' and 'Visit help centre'. A search bar is present, and there are two main sections: 'My events' and 'My tasks'. The 'My tasks' section contains a table with columns for Status, Name, Priority, Start date, and Due date.

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

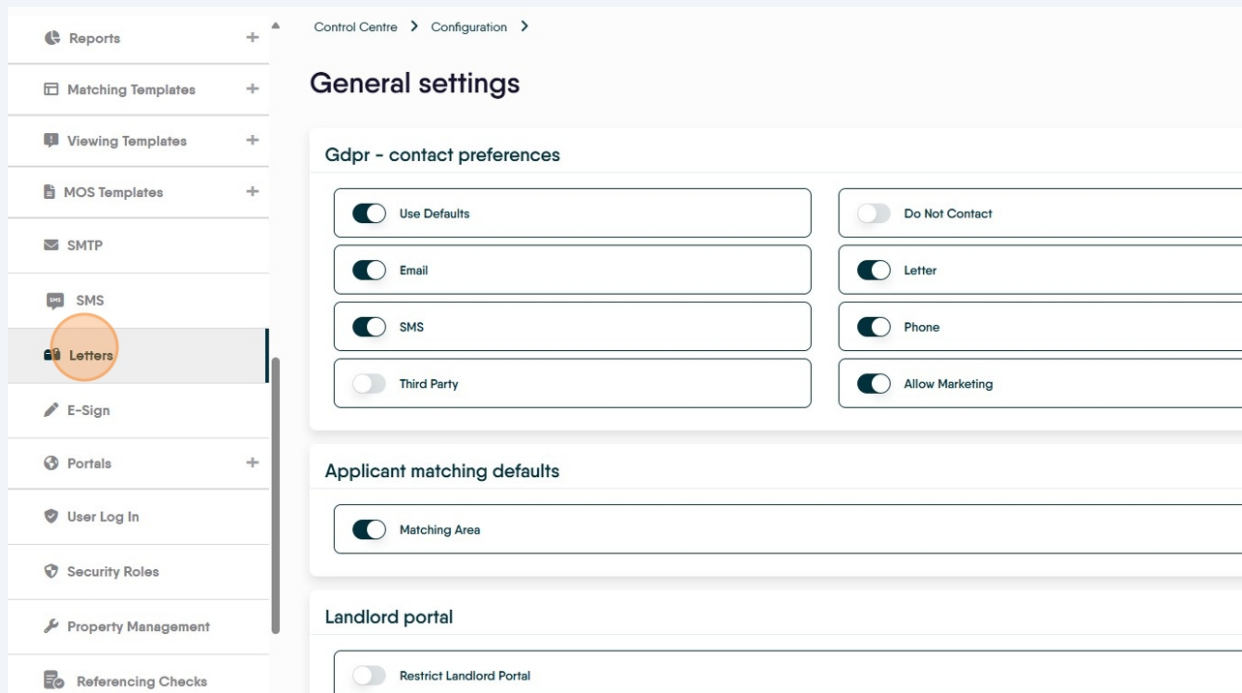
## 3 Click "Control centre"

The screenshot shows the IAM Property CRM dashboard with the 'My account' button highlighted in the previous step. The user profile menu is open, showing the user's name 'Training Dave' and a list of options: Active branches, Account settings, Control centre, Help centre, and Log out. The 'Control centre' option is highlighted with an orange circle. The background of the dashboard is visible but slightly blurred.

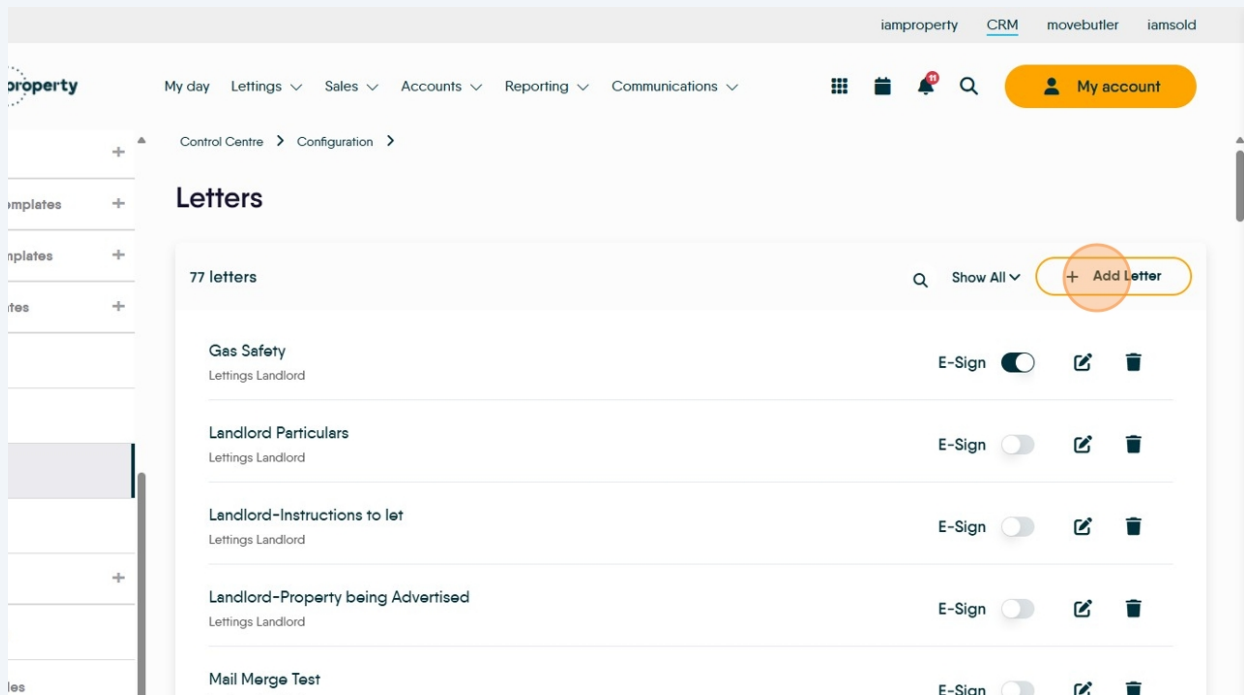
#### 4 Click "Configuration"



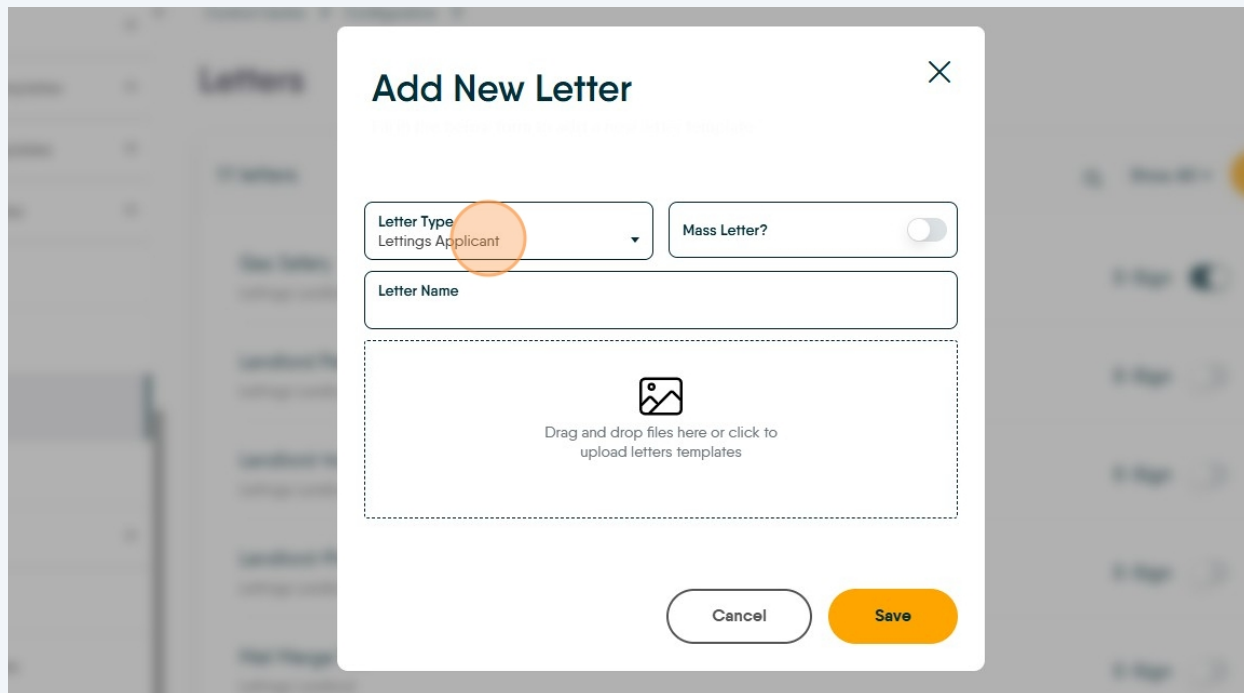
#### 5 Scroll down and Click "Letters"



6 To add a new letter click "Add Letter"



7 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.

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


**Add New Letter** ✕

Click to select a letter type from the dropdown menu.

**Letter Type**  
Lettings Applicant

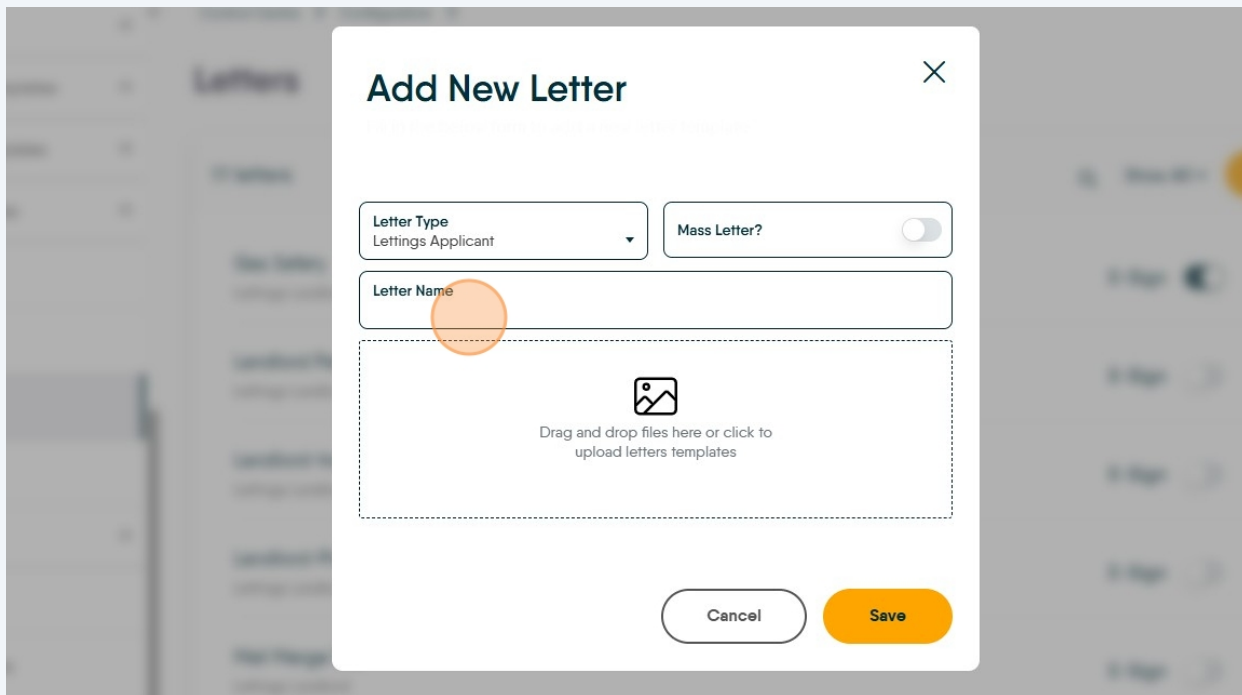
**Mass Letter?** ☐

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

 Click to upload files here or click to select templates

9

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

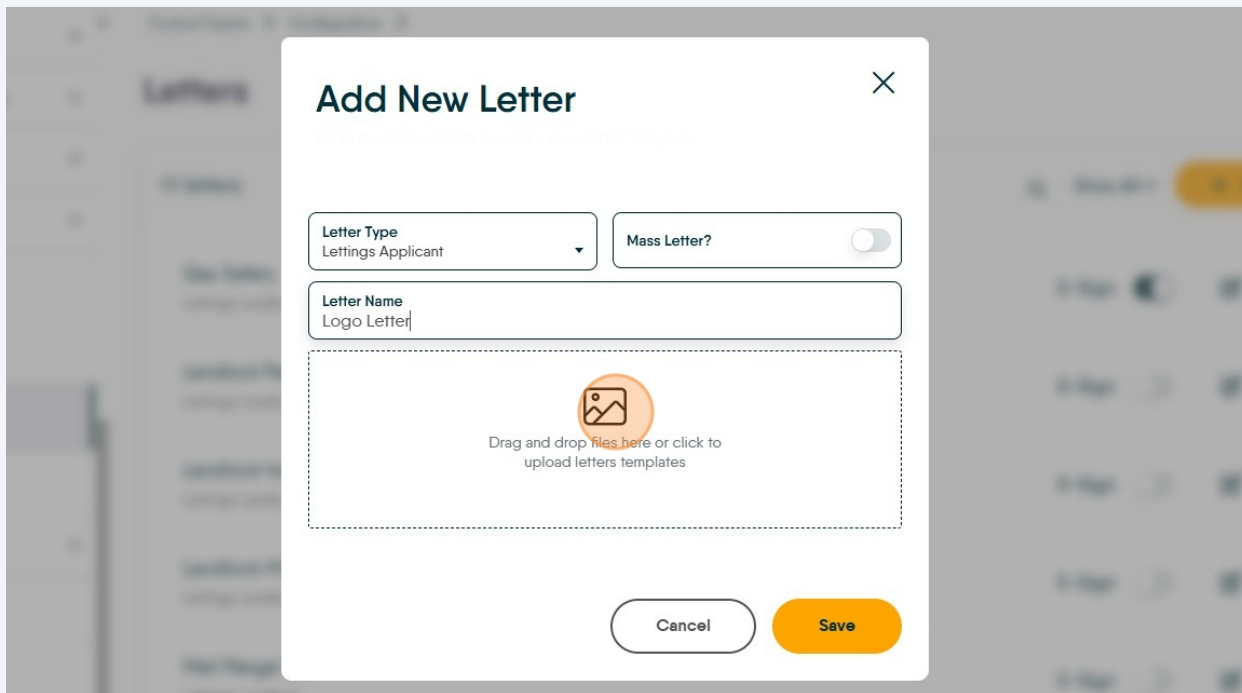


The screenshot shows a modal window titled "Add New Letter" with a close button (X) in the top right corner. Below the title is a subtitle: "This is the name that will be used to identify this letter in the CRM." The form contains the following elements:

- A "Letter Type" dropdown menu with "Lettings Applicant" selected.
- A "Mass Letter?" toggle switch, currently turned off.
- A "Letter Name" text input field, which is highlighted with an orange circle.
- A dashed rectangular area below the input field containing a small image icon and the text: "Drag and drop files here or click to upload letters templates".
- At the bottom, there are two buttons: "Cancel" (white with a grey border) and "Save" (solid orange).

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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. In this step, the text "Drag and drop files here or click to upload letters templates" within the dashed box is highlighted with an orange circle. The "Letter Name" field now contains the text "Logo Letter". All other elements, including the "Letter Type", "Mass Letter?" toggle, and the "Cancel" and "Save" buttons, remain the same as in the previous screenshot.

**11** Once your document is added click "Save"

**Add New Letter**

Letter Type  
Lettings Applicant

Mass Letter? ☐

Letter Name  
Logo Letter

51.6 KB  
logo test.rtf

[Remove file](#)

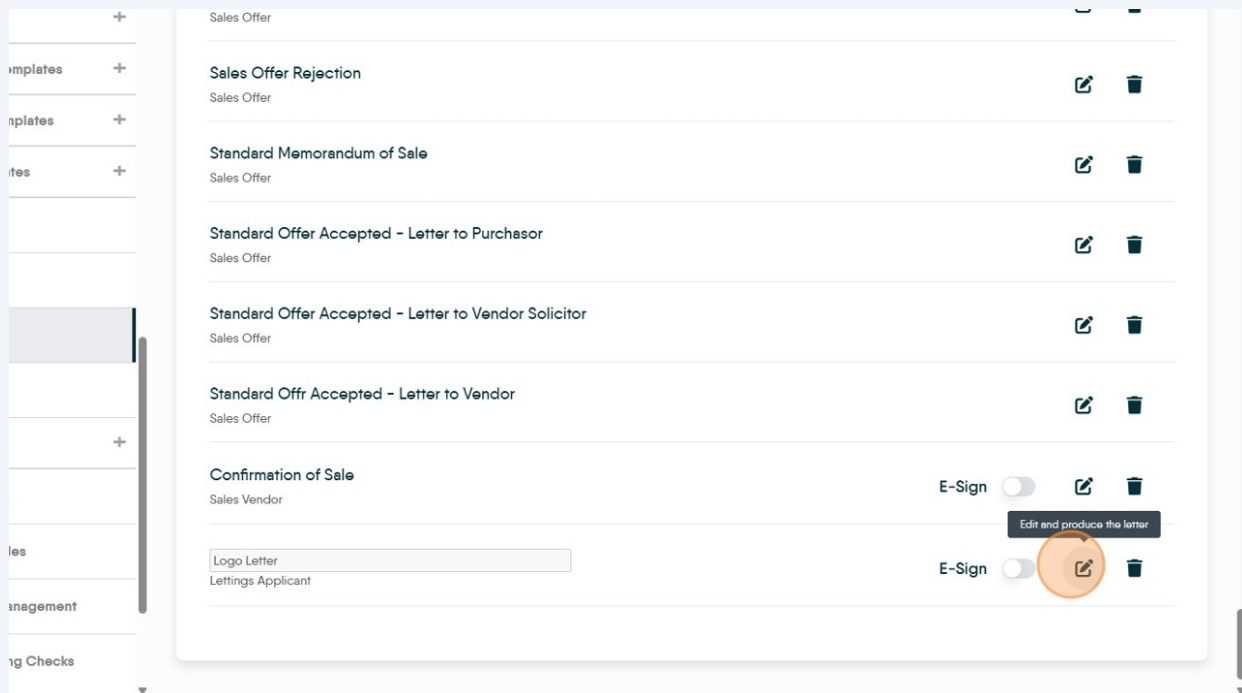
Cancel Save



Alert! Once the letter is added you can add 'Merge Fields' to automatically include information in the letter. For example, you may want to add client addresses, property sales details etc.

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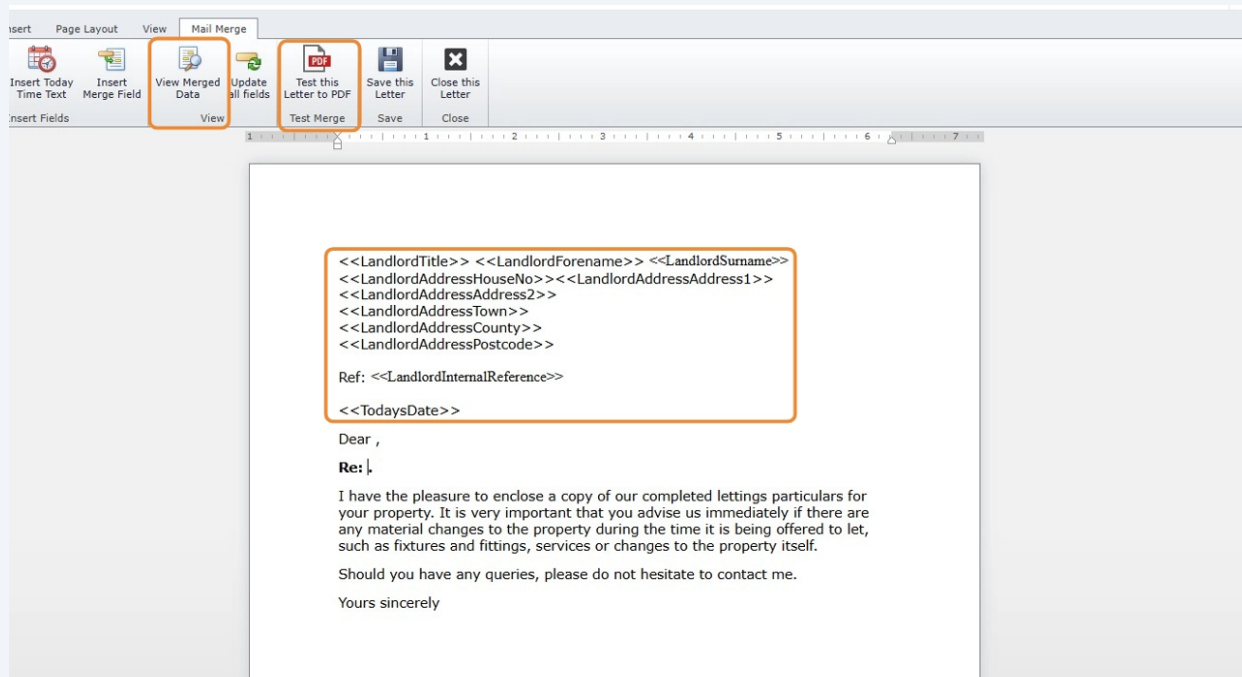
In the letters menu of CRM scroll to find the letter you have just added, it will most likely be at the end of the list. Click here to open the editor.



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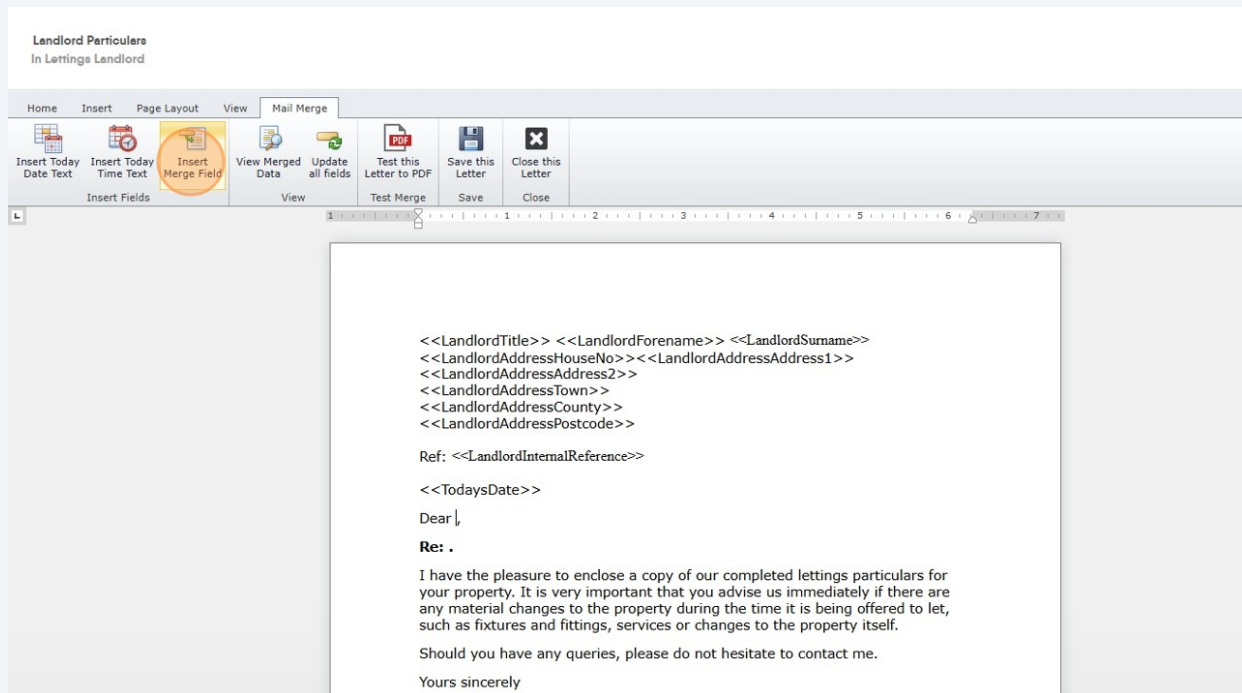
Merge Fields will show like those highlighted below. If the uploaded letter has text that looks like this it is advised to test the letter to see if the merge fields need to be updated.

Test the merge fields by selecting either the 'View Merge Data' or 'Test this Letter to PDF' options, highlighted below.





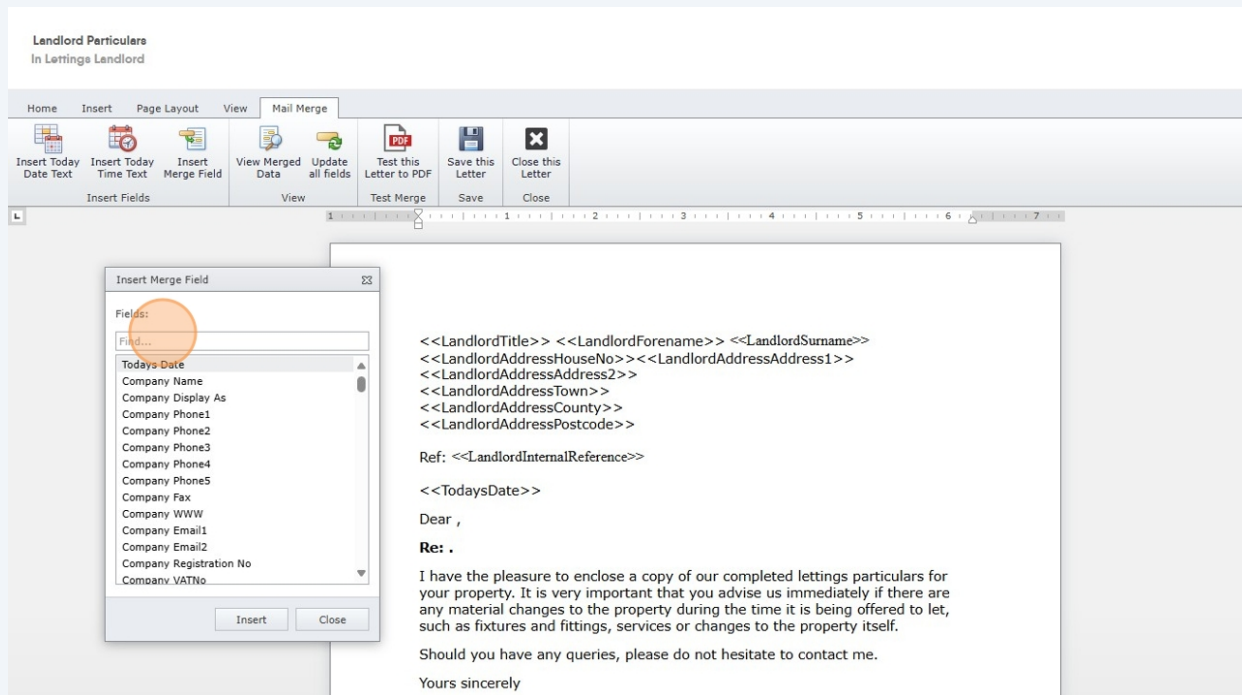
## 14 To add or update the merge fields. Click "Insert Merge Field"



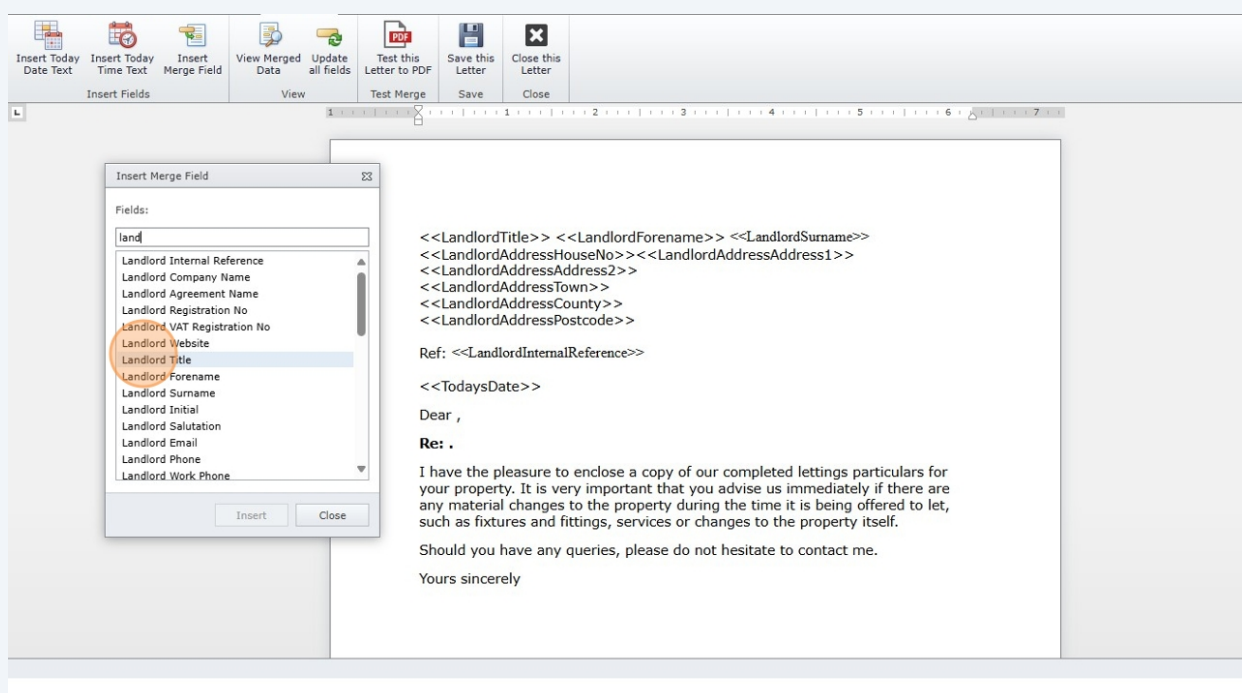
## 15 Click onto the letter where you want the tag to be placed.

Click the "Fields:" search option at the top of the screen. Search for the tag you want to use.

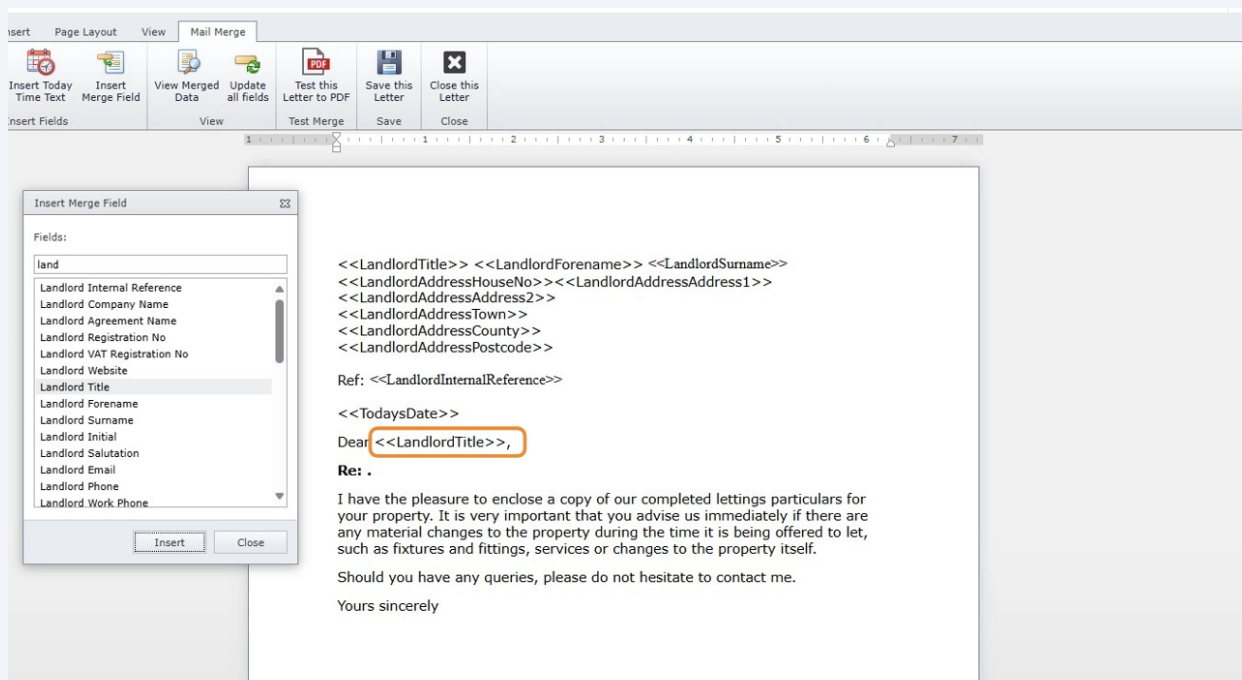
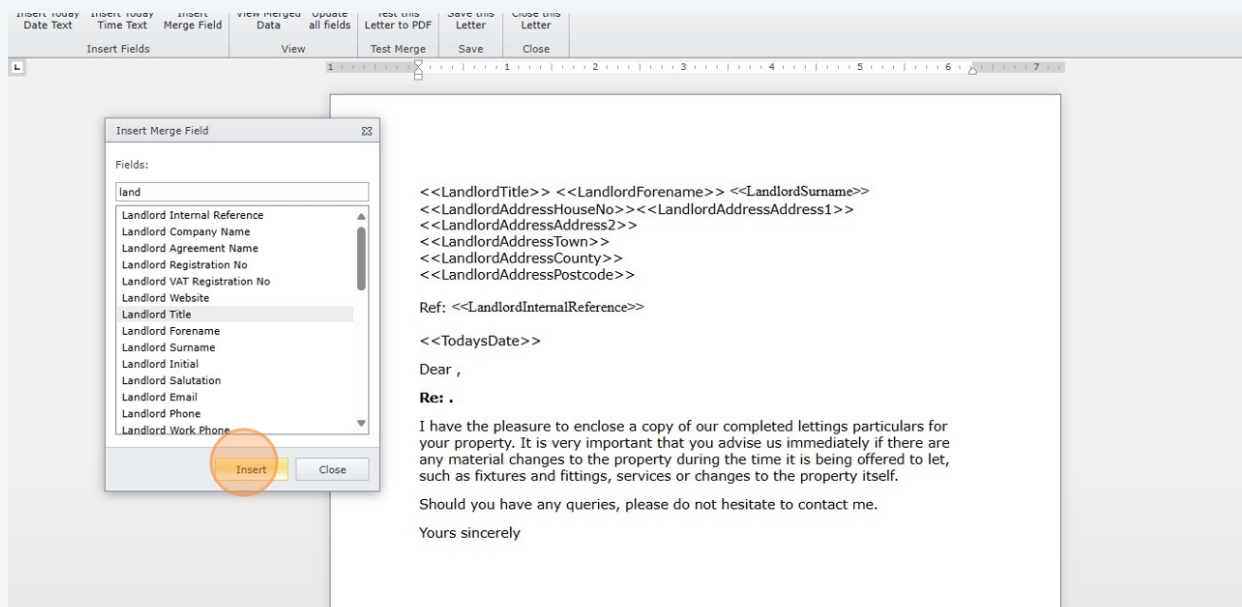
N.B. Scrolling will not always find you the option required.



## 16 For example, type Land this will show all the merge fields with 'Land' as part of the field name. Click "Landlord Title"

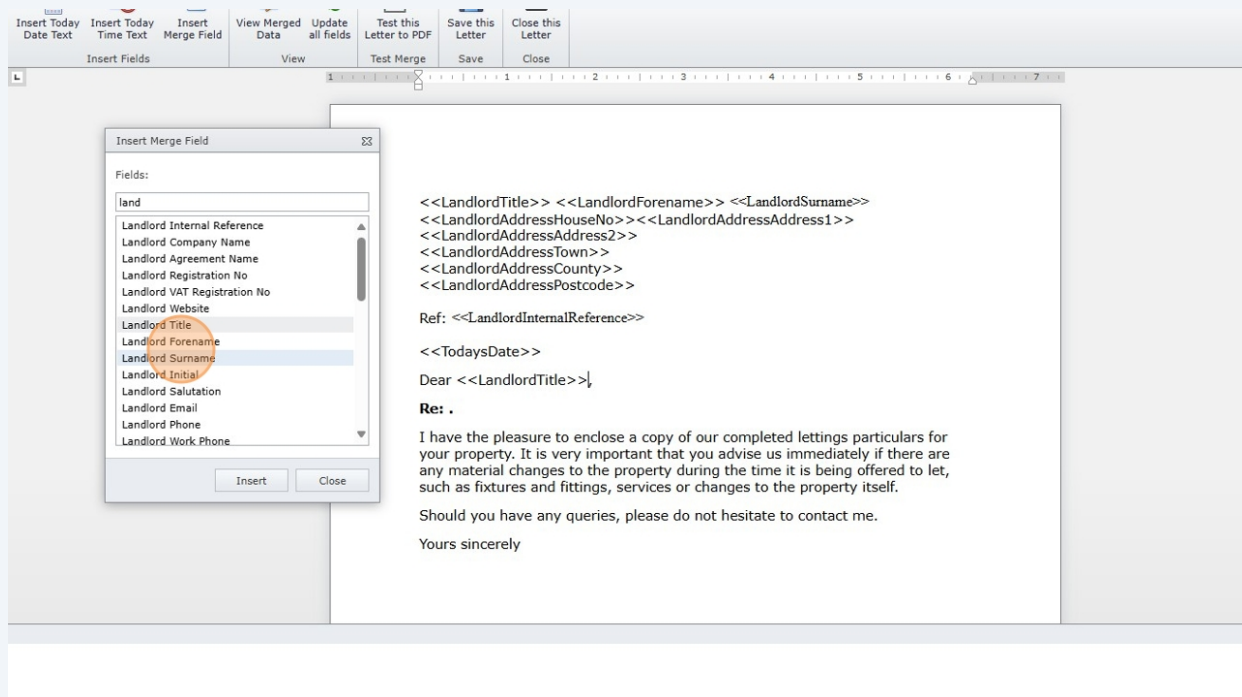


## 17 Click "Insert" this will then add the merge field to the letter.



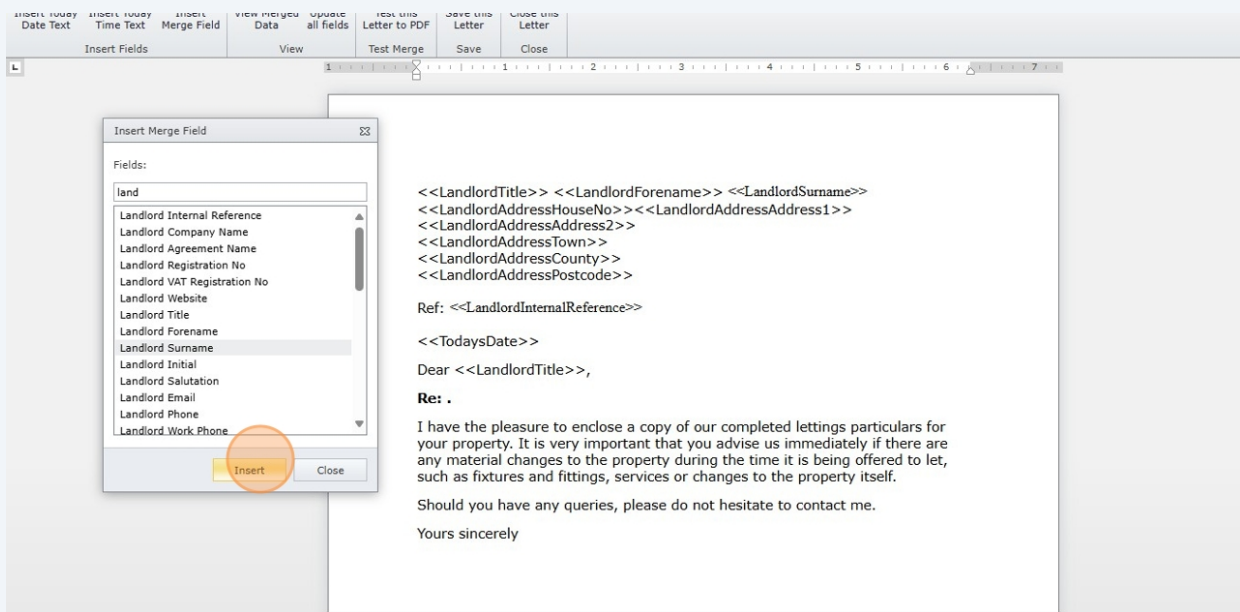
18

To add another merge field, click on the screen where you want the merge field to be placed and select the option from the list e.g. Click "Landlord Surname"

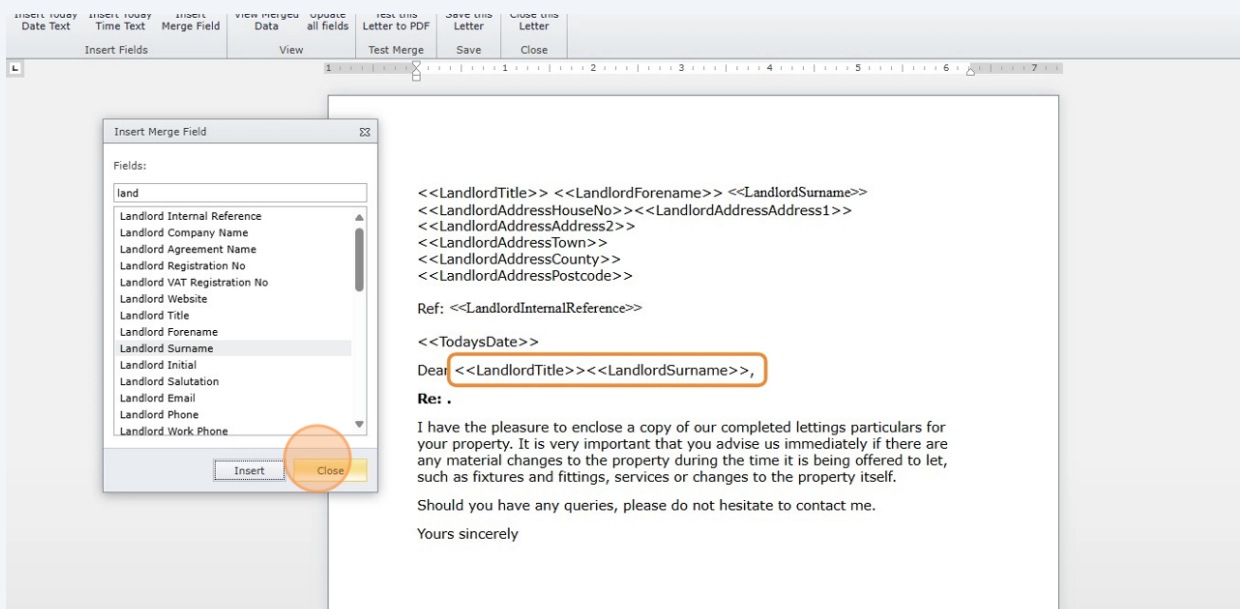


Tip! Once you are comfortable with this process you may find that it is not necessary to click on the screen each time.

## 19 Click "Insert"



## 20 The merge field will be added. Once all your merge fields are added, click "Close"



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Click "Save this Letter" ypu will return to the main Letters Configuration screen.

