

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

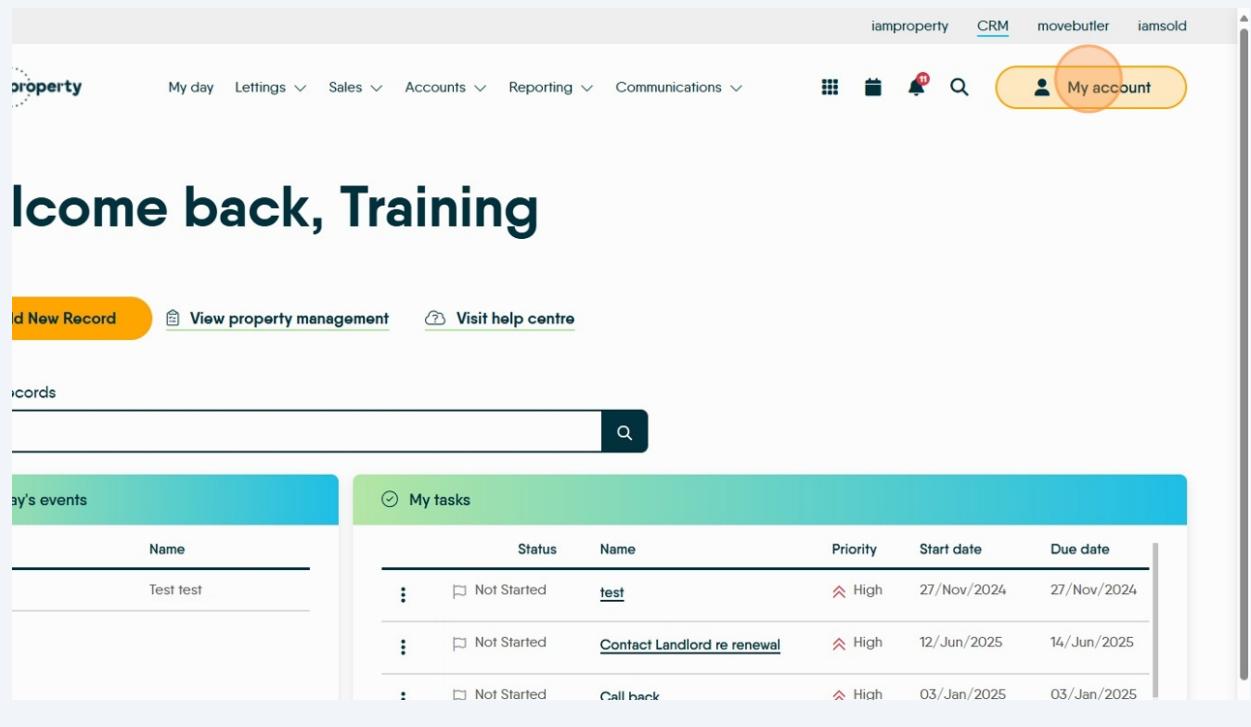
+ Add New Record View property management Visit help centre

Search all records

Time	Name
12:00	Test test

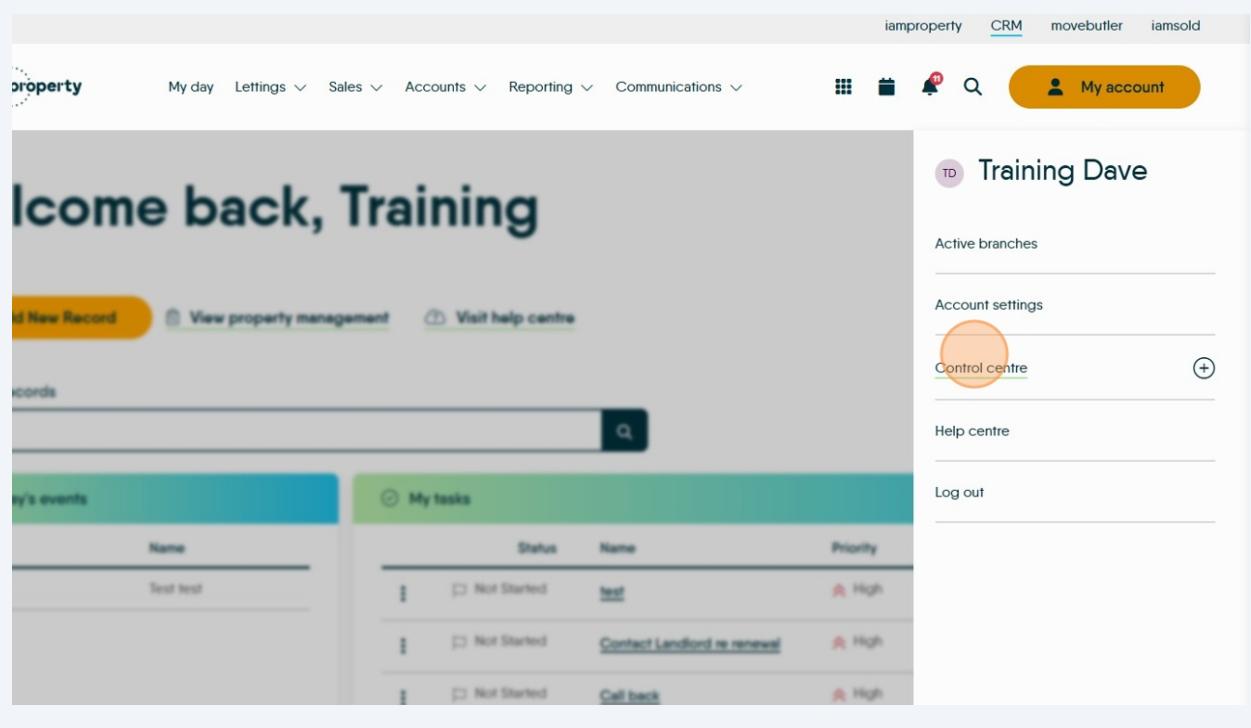
	Status	Name	Priority	Start date	Due date
⋮	Not Started	test	High	27/Nov/2024	27/Nov/2024
⋮	Not Started	Contact Landlord re renewal	High	12/Jun/2025	14/Jun/2025
⋮	Not Started	Call back	High	03/Jan/2025	03/Jan/2025
⋮	Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

2 Click "My account"



The screenshot shows the iCompleto 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 two sections: 'My events' (which shows a single entry 'Test test') and 'My tasks' (which shows three tasks: 'test' (Status: Not Started, Priority: High, Due date: 27/Nov/2024), 'Contact Landlord re renewal' (Status: Not Started, Priority: High, Due date: 14/Jun/2025), and 'Call back' (Status: Not Started, Priority: High, Due date: 03/Jan/2025)).

3 Click "Control centre"



The screenshot shows the iCompleto software interface, similar to the previous one but with a different user profile. The top bar and main content area are identical to the first screenshot. On the right side, the user profile is 'Training Dave'. Below the profile, there is a sidebar with the following options: 'Active branches' (which is empty), 'Account settings' (with a 'Control centre' button highlighted with an orange circle and a '+' sign), 'Help centre' (which is empty), and 'Log out'.

4 Click "Configuration"

The screenshot shows a software interface with a header "Come back, Training" and a user profile "Training Dave". Below the header, there are buttons for "New Record", "View property management", and "Visit help centre". The main area is divided into sections: "My events" (with a single entry "Test test") and "My tasks". The "My tasks" section contains a table with the following data:

	Status	Name	Priority
1	Not Started	test	High
2	Not Started	Contact Landlord re renewal	High
3	Not Started	Call back	High
4	Not Started	Make Tea	High
5	Not Started	Clean Windows	High

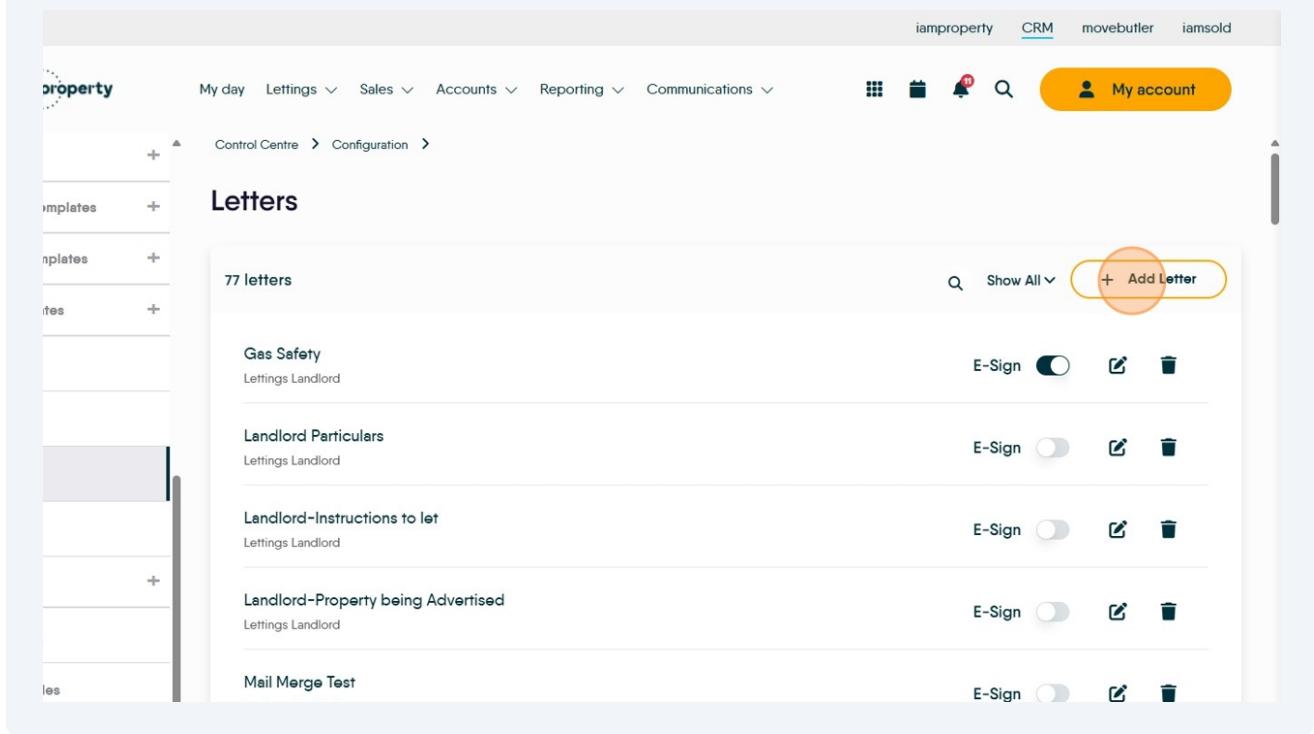
On the right side, there is a sidebar with links: "Active branches", "Account settings", "Control centre" (which is highlighted with a red circle), "Dashboard", "Users", "Branches", "Company", "Property Management Settings", and "Help centre".

5 Scroll down and Click "Letters"

The screenshot shows the "Letters" configuration page. The left sidebar lists various configuration categories: Reports, Matching Templates, Viewing Templates, MOS Templates, SMTP, SMS, Letters (which is highlighted with a red circle), E-Sign, Portals, User Log In, Security Roles, Property Management, and Referencing Checks. The main content area is titled "General settings" and contains the following sections:

- Gdpr - contact preferences**: A grid of toggle switches:
 - Use Defaults (on)
 - Do Not Contact (off)
 - Email (on)
 - Letter (off)
 - SMS (on)
 - Phone (off)
 - Third Party (off)
 - Allow Marketing (on)
- Applicant matching defaults**: A toggle switch for "Matching Area" (on).
- Landlord portal**: A toggle switch for "Restrict Landlord Portal" (off).

6 To add a new letter click "Add Letter"

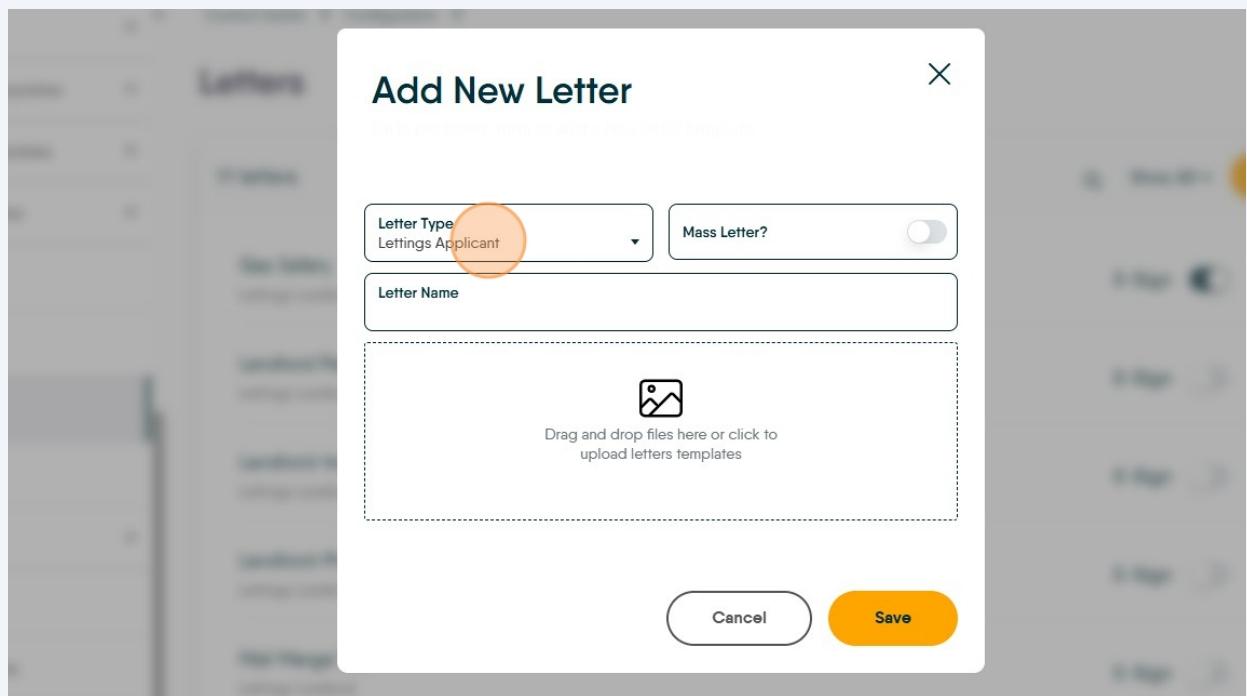


Letters

77 letters

Name	Type	Status	Actions
Gas Safety	Lettings Landlord	E-Sign <input checked="" type="checkbox"/>	 
Landlord Particulars	Lettings Landlord	E-Sign <input type="checkbox"/>	 
Landlord-Instructions to let	Lettings Landlord	E-Sign <input type="checkbox"/>	 
Landlord-Property being Advertised	Lettings Landlord	E-Sign <input type="checkbox"/>	 
Mail Merge Test		E-Sign <input type="checkbox"/>	 

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



Add New Letter

Lettings Applicant

Mass Letter?

Letter Name

Drag and drop files here or click to upload letters templates

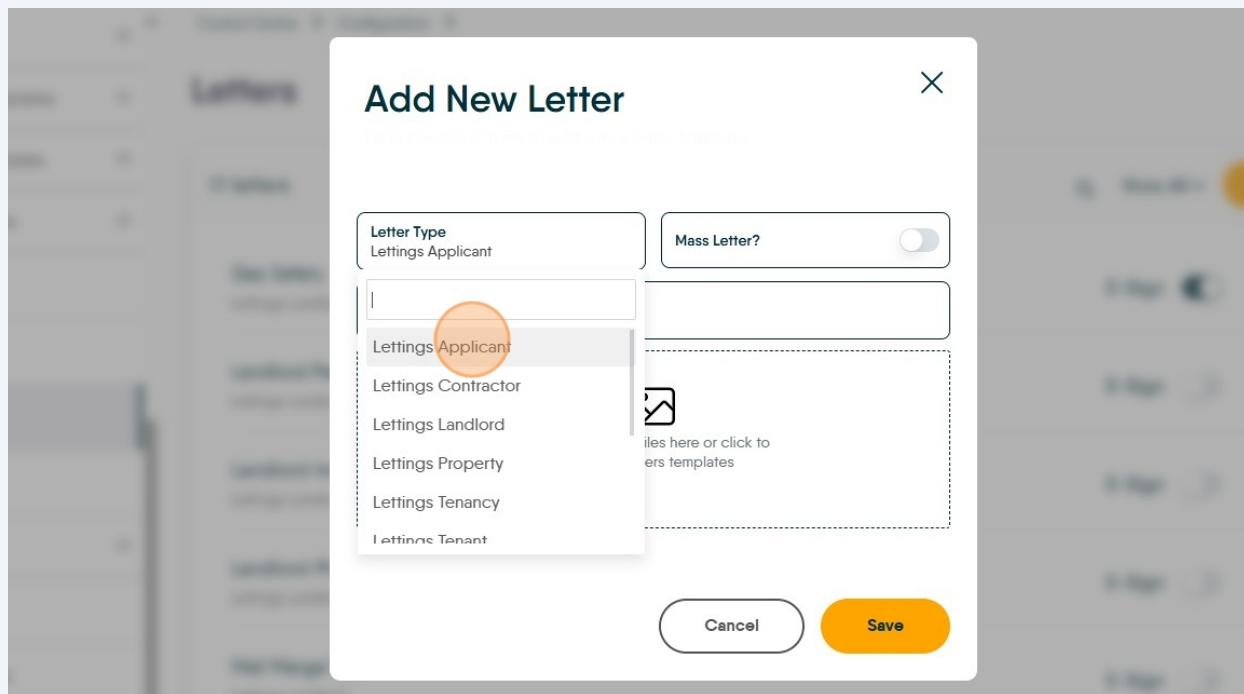
Cancel Save



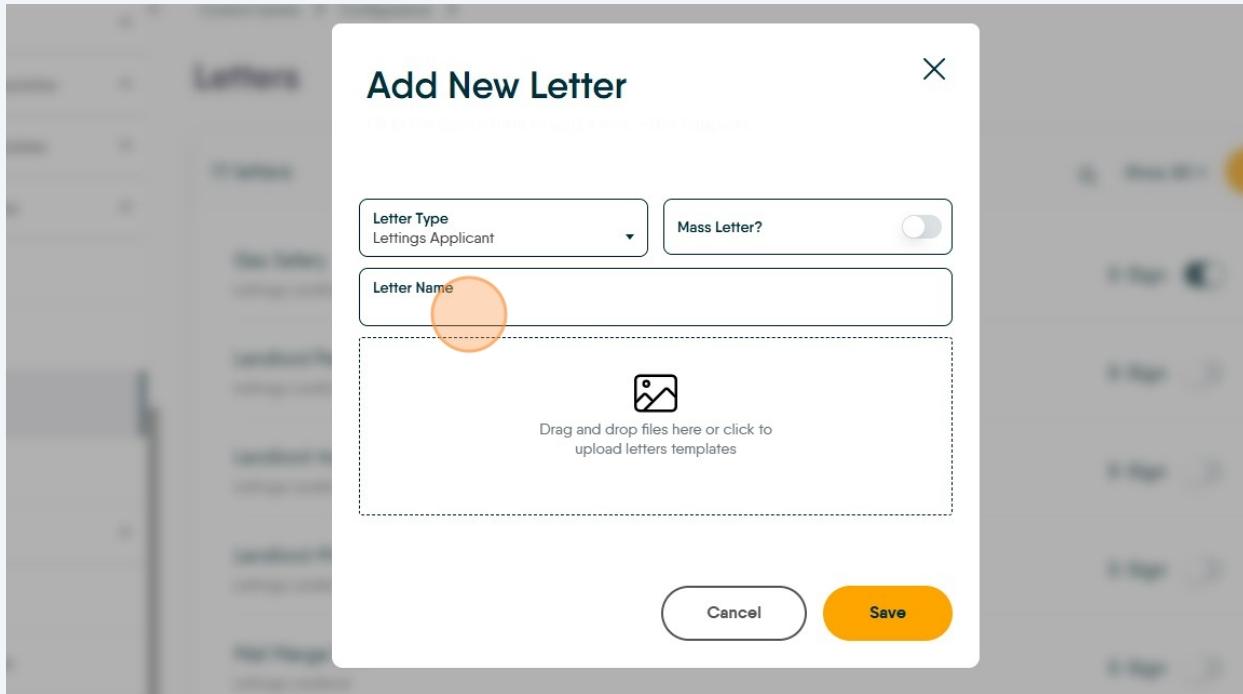
Alert! When creating a letter in CRM it is important you create the correct letter type in the Add New Letter section. If you select Lettings Applicant as the letter type, this letter will only be available in the Lettings Applicant area of CRM and NOT in another section e.g. Landlord. If you want a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

8

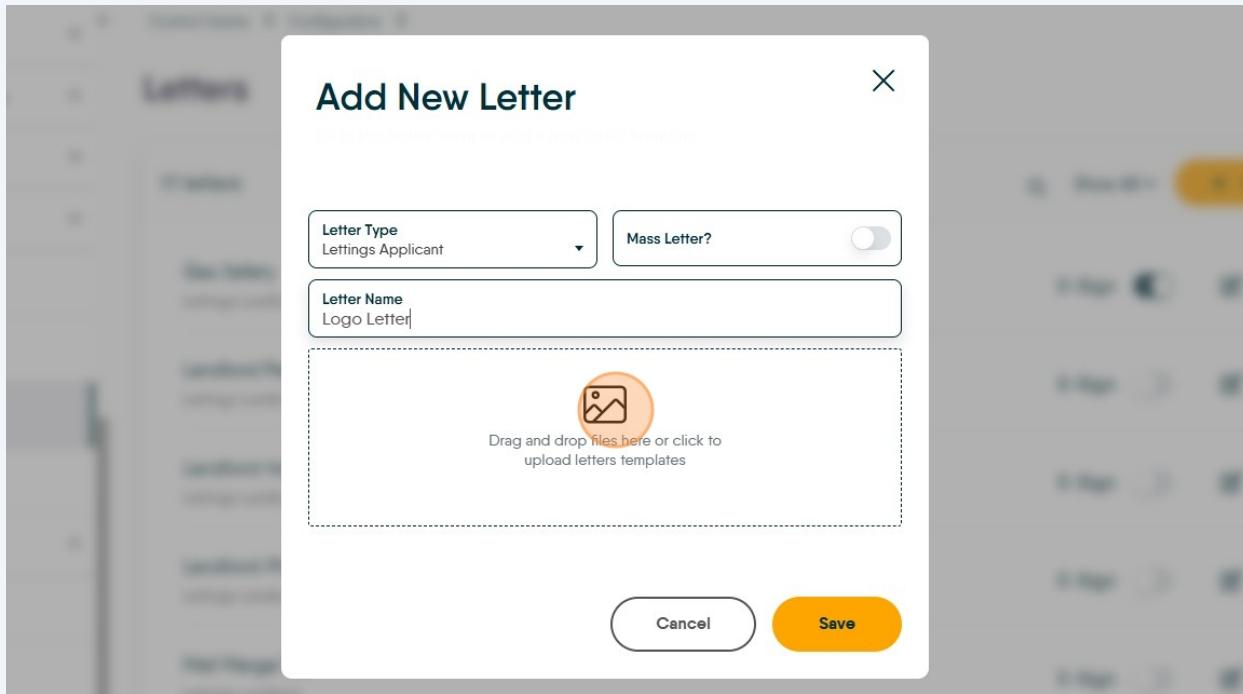
Click and select the letter type from the drop down menu.



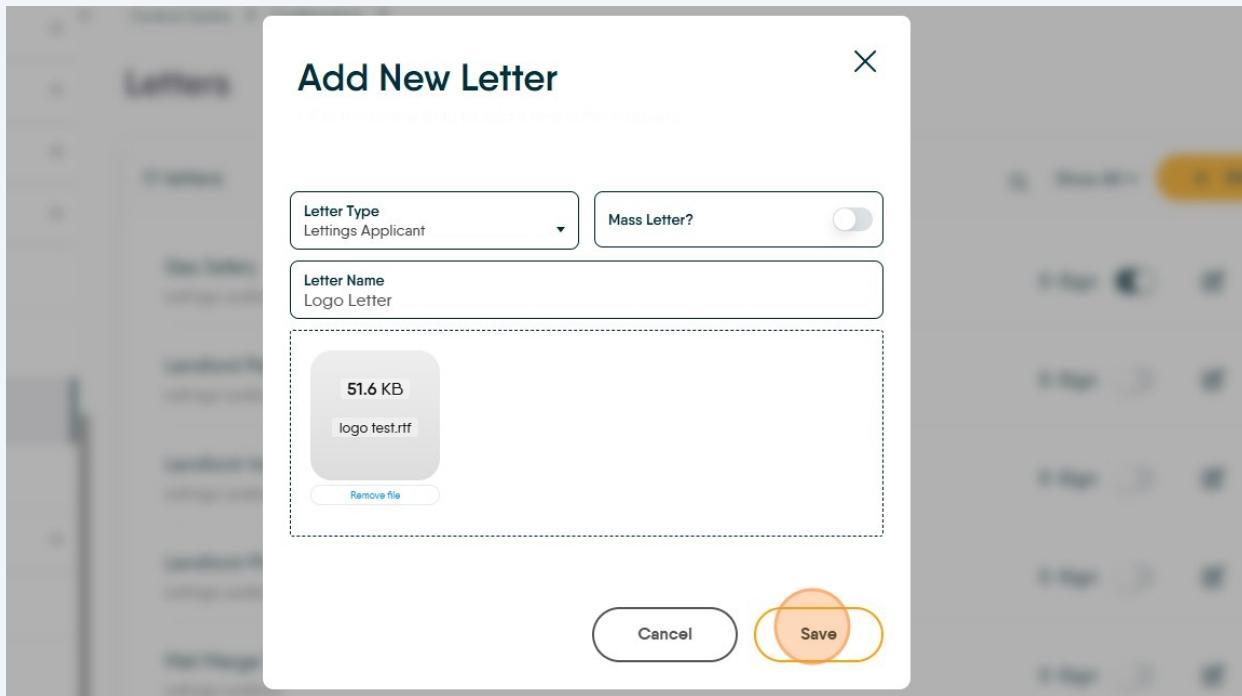
9 Click the "Letter Name" field, name your letter as you would like it to be seen in CRM



10 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.



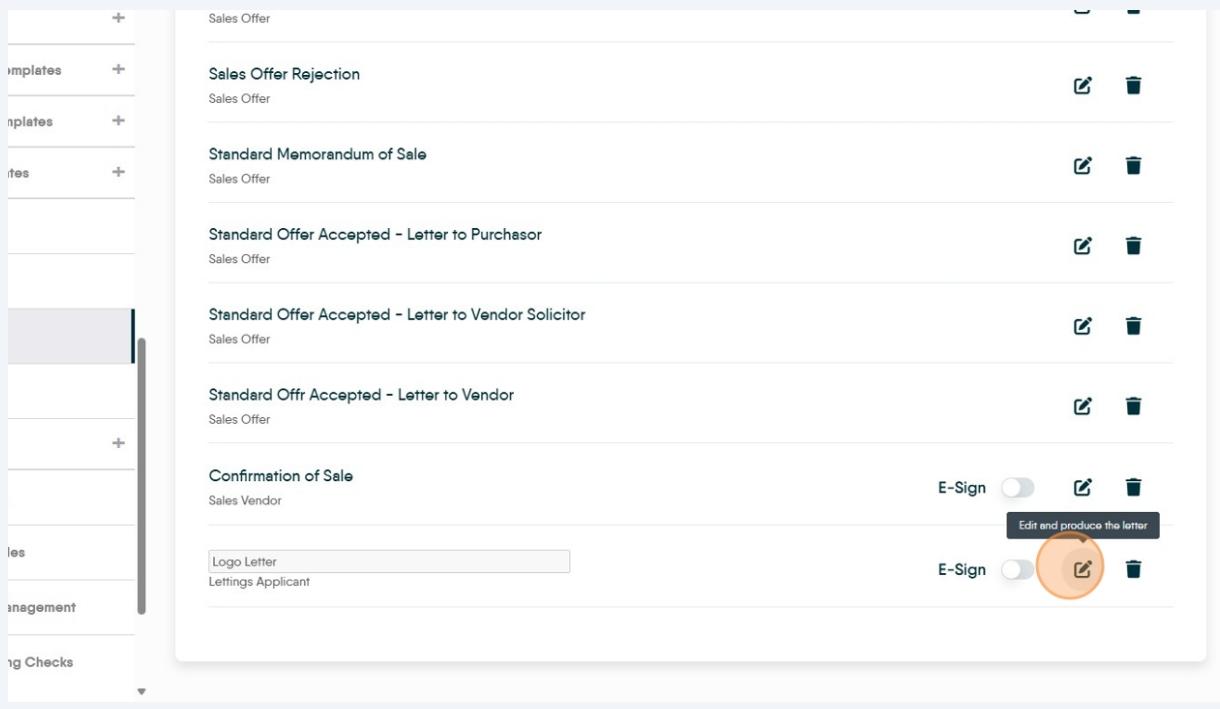
11 Once your document is added click "Save"



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.

12

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 the CRM letters menu. On the left, there are navigation tabs: 'Letters' (highlighted in grey), 'Emails', 'Checklist', 'Management', and 'Checklist'. The main area displays a list of documents with the following details:

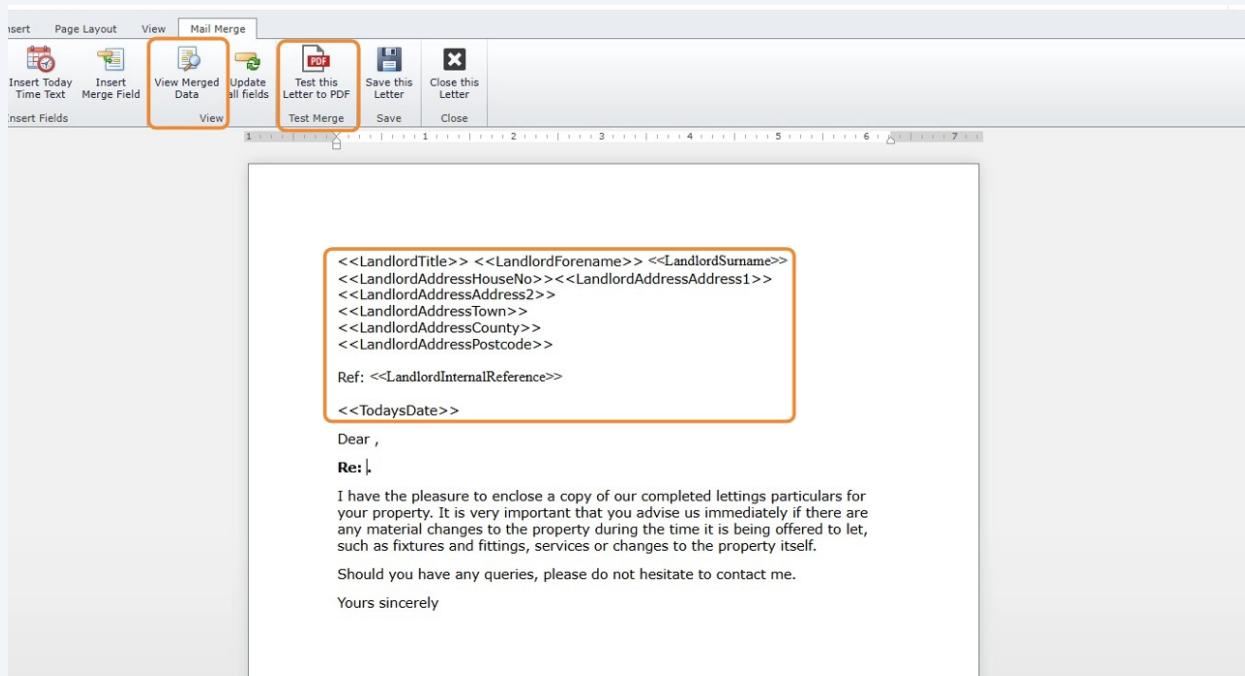
- Sales Offer
- Sales Offer Rejection
- Sales Offer
- Standard Memorandum of Sale
- Sales Offer
- Standard Offer Accepted - Letter to Purchaser
- Sales Offer
- Standard Offer Accepted - Letter to Vendor Solicitor
- Sales Offer
- Standard Offer Accepted - Letter to Vendor
- Sales Offer
- Confirmation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

At the bottom right, there are two 'E-Sign' toggle buttons. The top one is labeled 'Edit and produce the letter' and is highlighted with a red circle. The bottom one is labeled 'Edit'.

13

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.



The screenshot shows the Microsoft Word ribbon with the 'Mail Merge' tab selected. Below the ribbon, there are several buttons in the 'Merge' group:

- Insert Today
- Insert Merge Field
- View Merged Data (highlighted with a red circle)
- Update All Fields
- Test this Letter to PDF (highlighted with a red circle)
- Save this Letter
- Close this Letter
- Save
- Close

The main content area of the Word document shows a block of text with merge fields, some of which are highlighted with a red box:

```
<<LandlordTitle>> <<LandlordForename>> <<LandlordSurname>>
<<LandlordAddressHouseNo>><<LandlordAddressAddress1>>
<<LandlordAddressAddress2>>
<<LandlordAddressTown>>
<<LandlordAddressCounty>>
<<LandlordAddressPostcode>>
Ref: <<LandlordInternalReference>>
<<TodaysDate>>
```

Below the merge fields, the letter continues:

Dear ,
Re: |

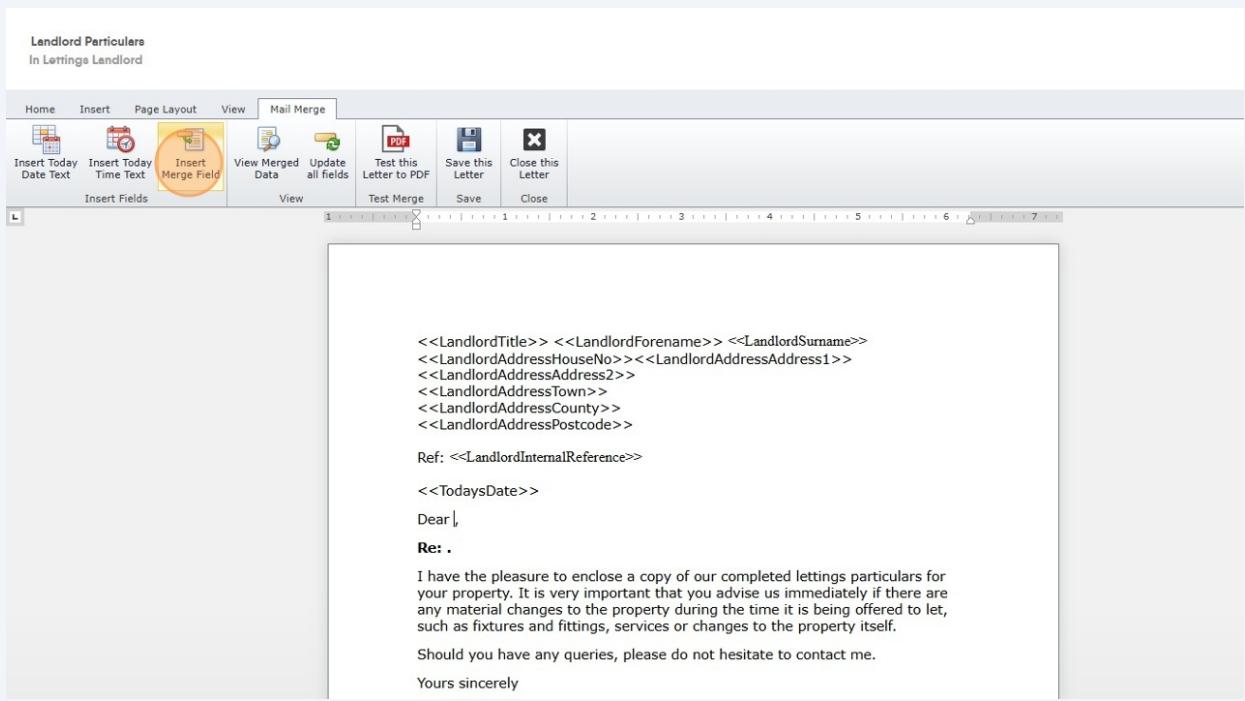
I have the pleasure to enclose a copy of our completed lettings particulars for your property. It is very important that you advise us immediately if there are any material changes to the property during the time it is being offered to let, such as fixtures and fittings, services or changes to the property itself.

Should you have any queries, please do not hesitate to contact me.

Yours sincerely

14

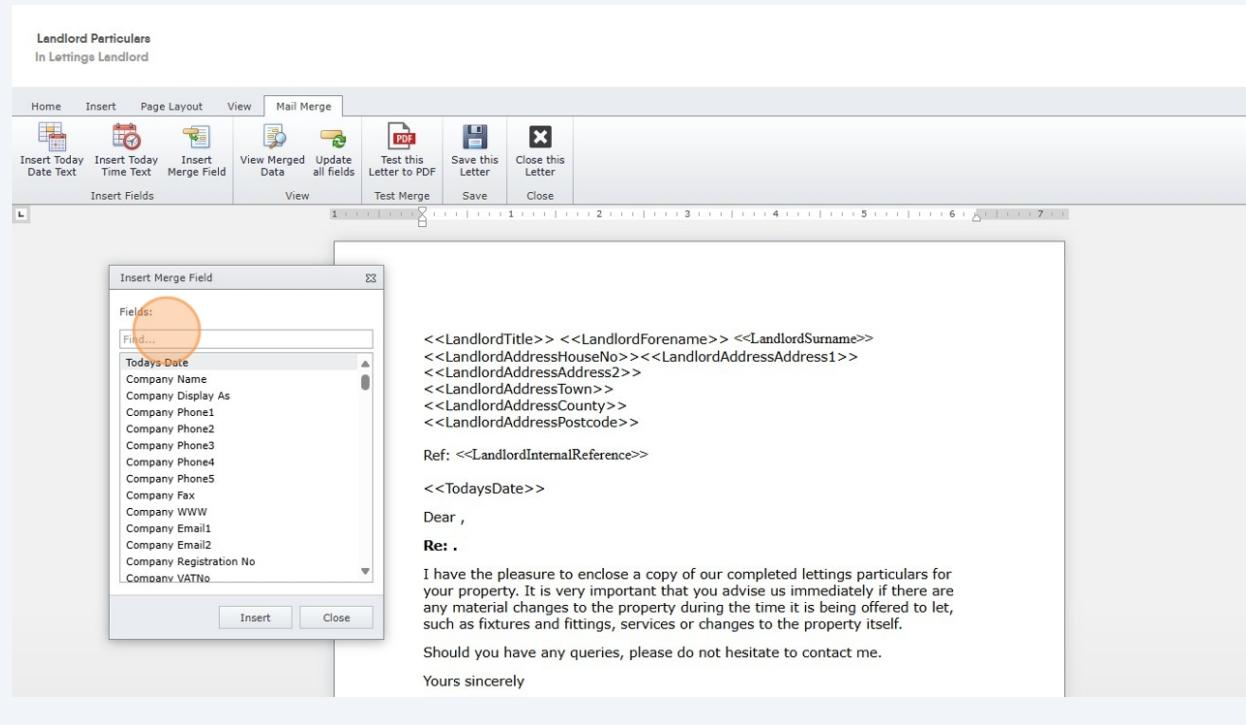
To add or update the merge fields. Click "Insert Merge Field"



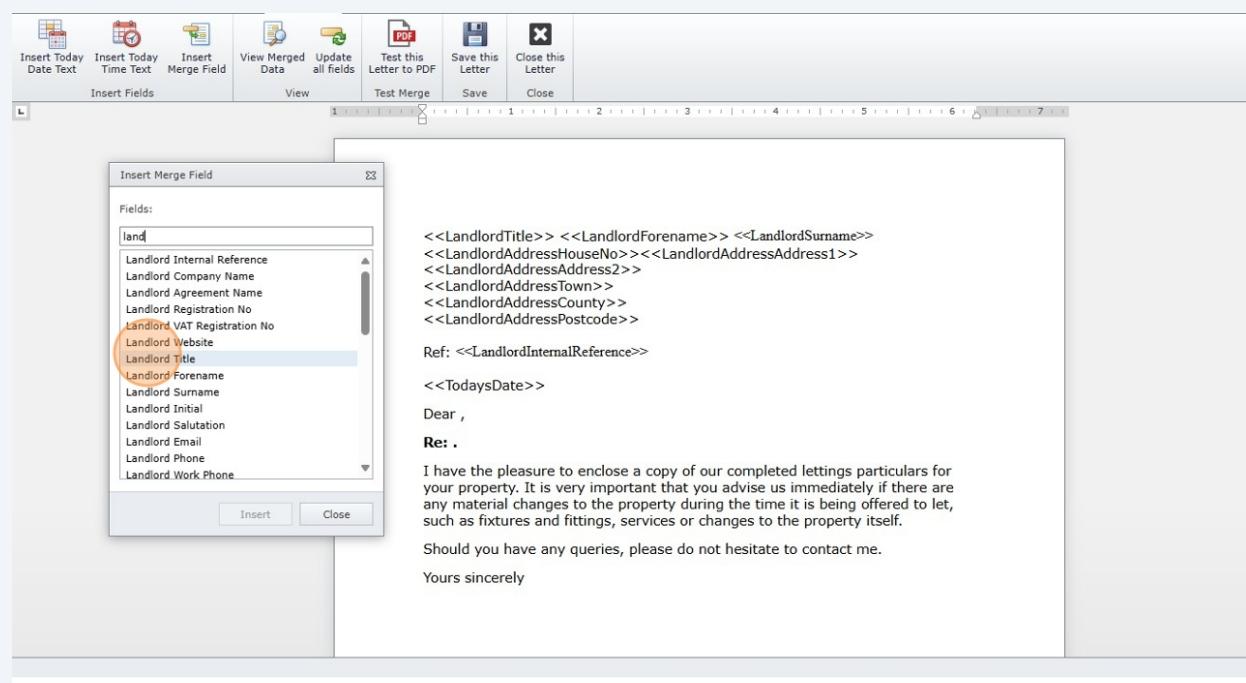
15 Click onto the letter where you want the tag to be placed.

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.

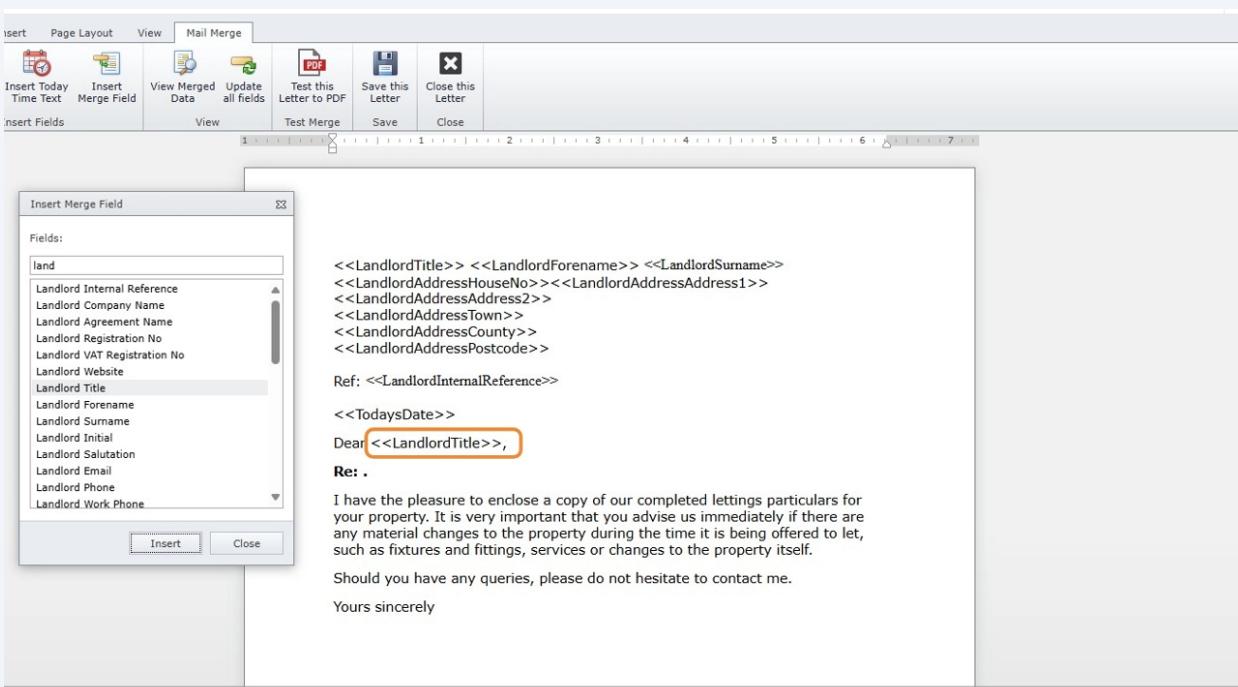
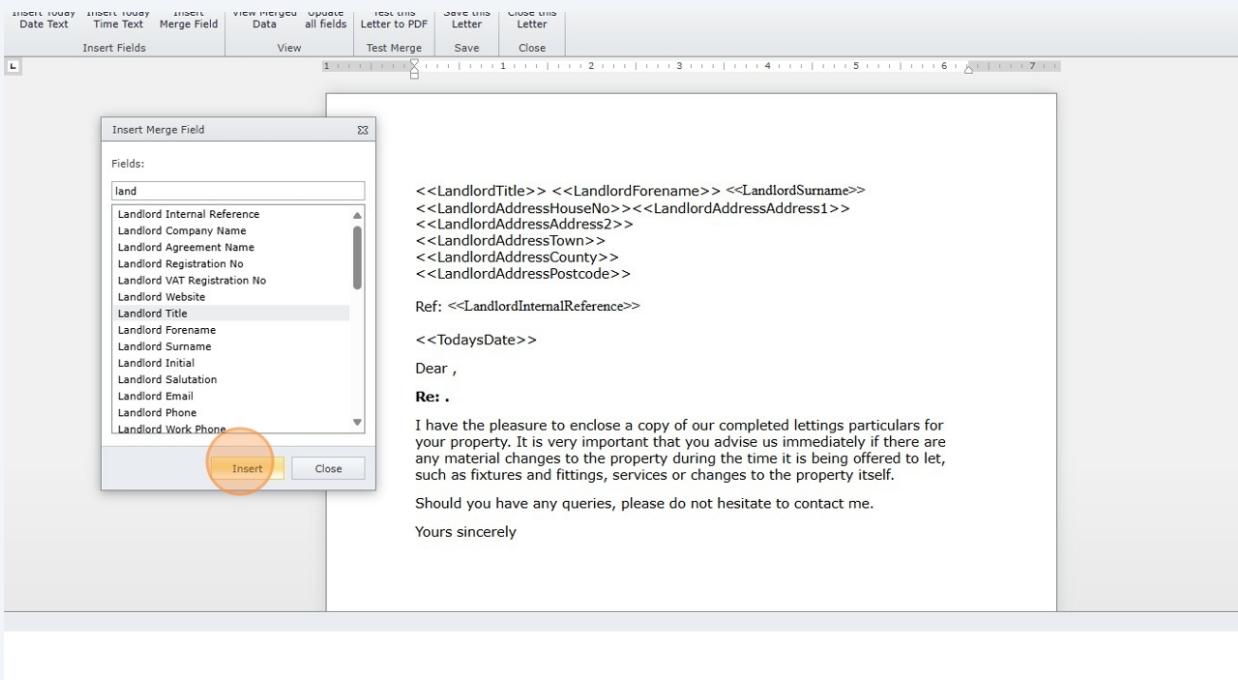


16 For example, type Land this will show all the merge fields with 'Land' as part of the field name. Click "Landlord Title"



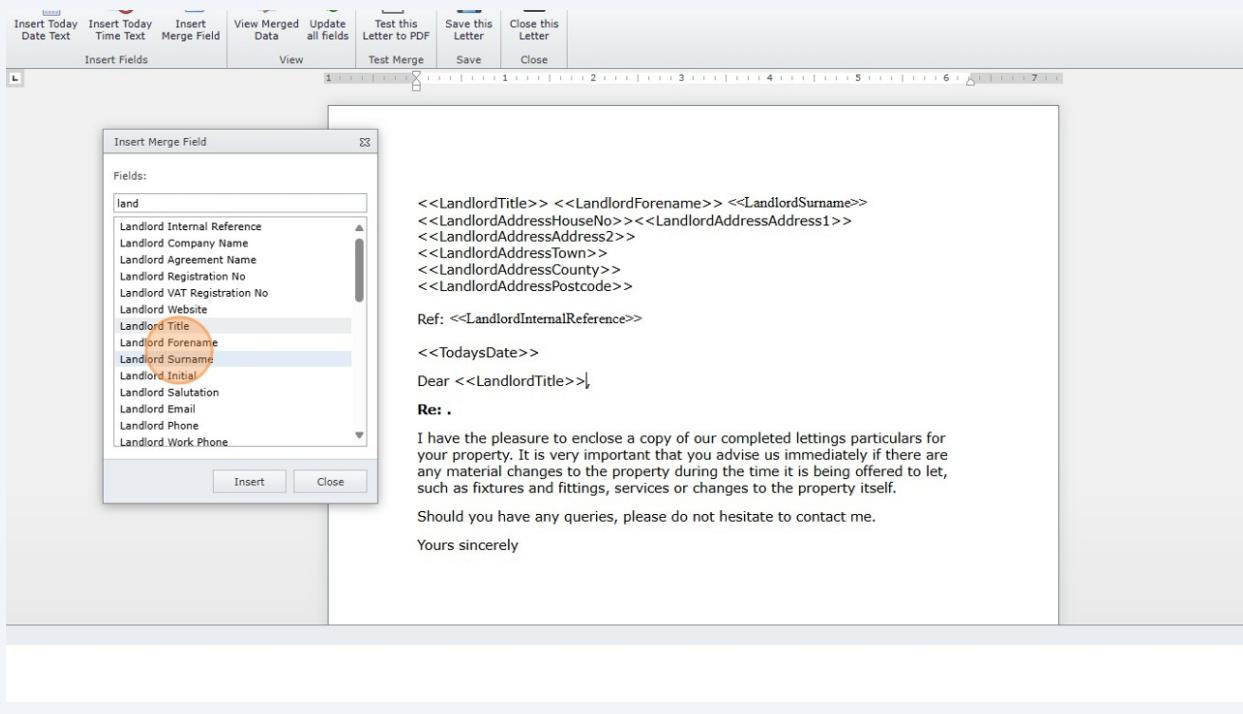
17

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



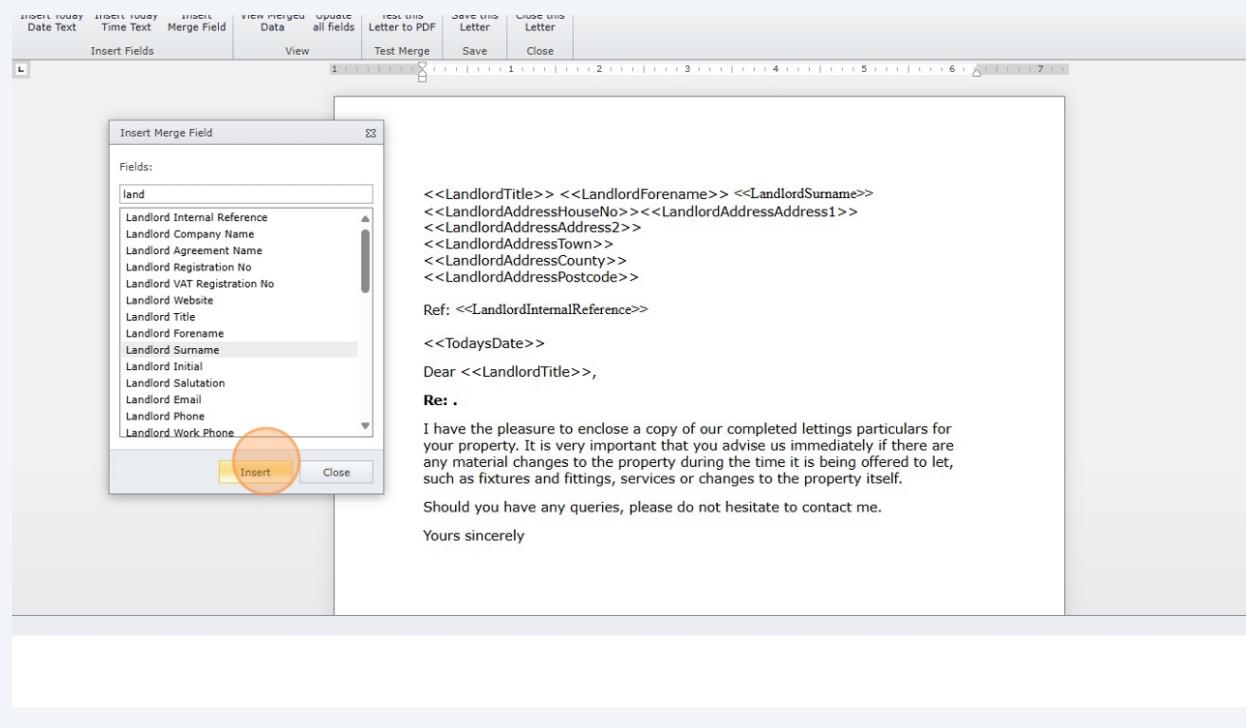
18

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"

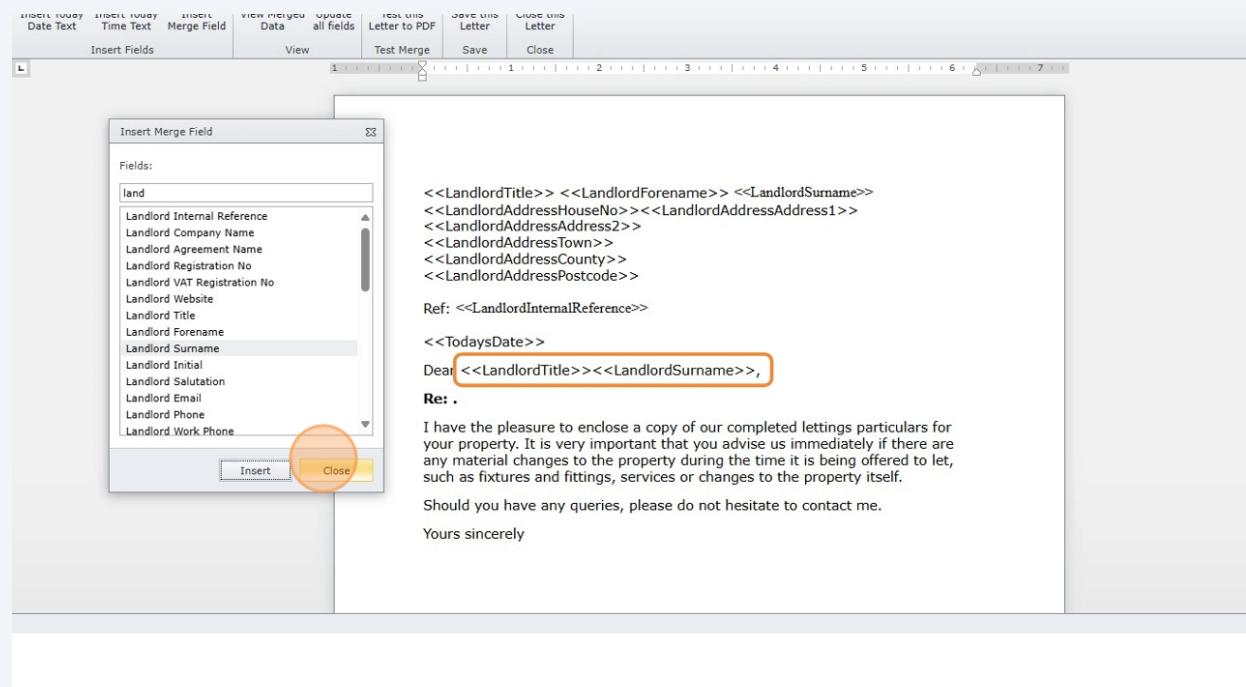


Tip! Once you are comfortable with this process you may find that it is not necessary to click on the screen each time.

19 Click "Insert"



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



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

