

# Sending a Letter Via E-Sign in CRM.



This guide provides a step-by-step process for sending an E-Sign letter to allow a letter to be E-signed in CRM via DocuSign.

This guide makes the assumption that you are already comfortable adding and editing Letters in CRM. Regardless of Letter type the process to add E-Sign tags is the same.



This guide assumes you have a Business Docusign Account, it is set up in CRM and you have credit on your docusign account.

## Sending Via E-Sign



Alert! The process to create and send a letter is the same regardless of what type of record you are sending the letter from and what type of letter you are sending, the only criteria is the E-Sign tags must be added and the letter enabled for E-Sign.

- 1 Click "Lettings" or "Sales" depending on document type or search for the Record you are sending the letter from. Alternatively use the 'Search' function.

Letters

78 letters

Letter Name	Recipient	E-Sign
Logo Letter	Lettings Applicant	Off
Gas Safety	Lettings Landlord	On
Landlord Particulars	Lettings Landlord	Off
Landlord-Instructions to let	Lettings Landlord	Off
Landlord-Property being Advertised		Off

- 2 For example here we will look at sending a Landlord Letter.

Click "General"

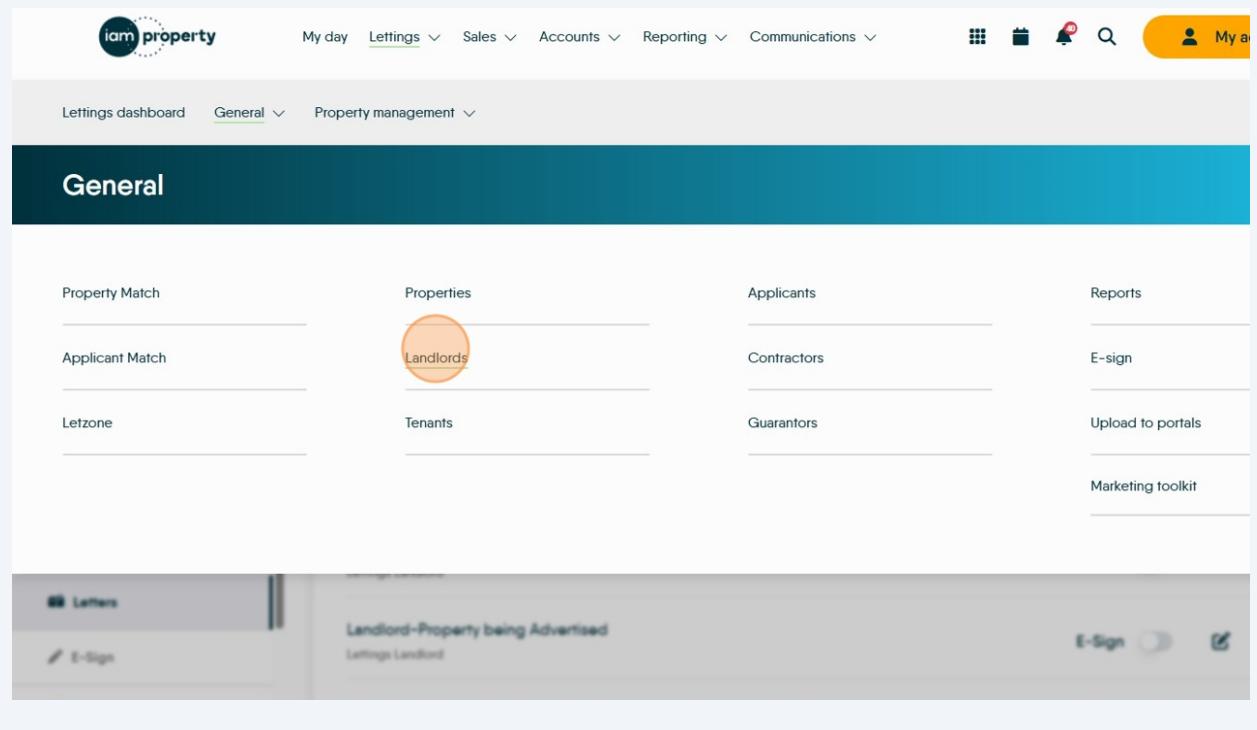
General

Letters

78 letters

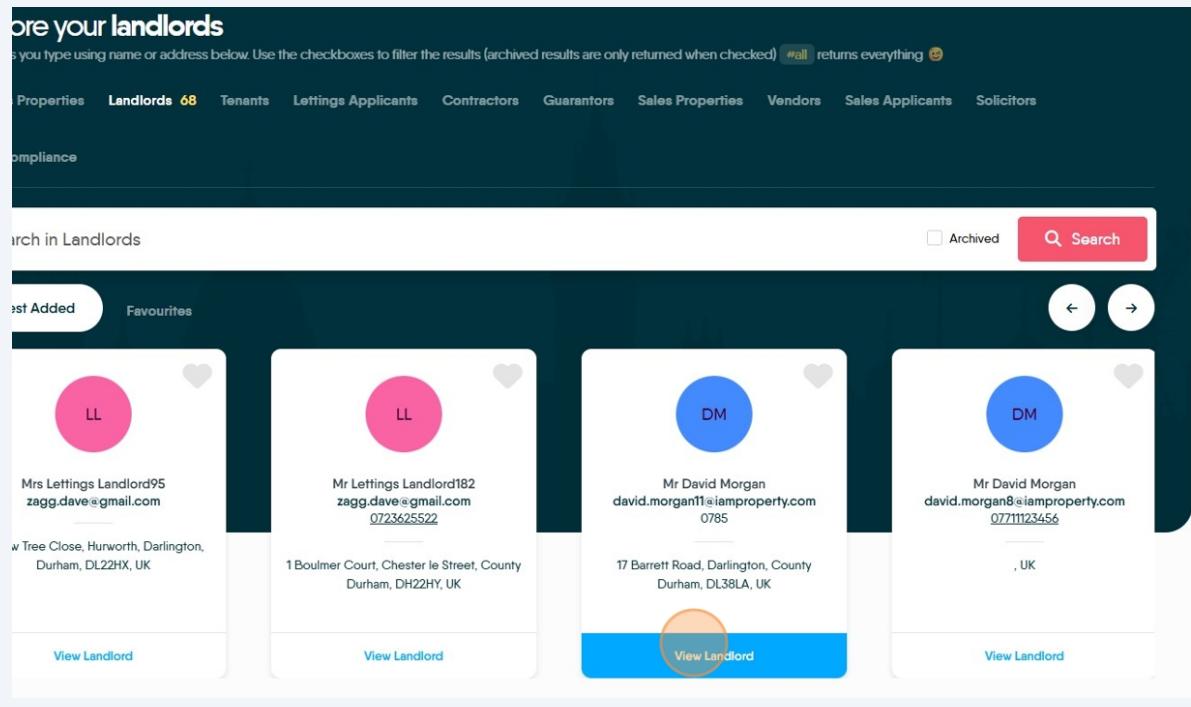
Letter Name	Recipient	E-Sign
Logo Letter	Lettings Applicant	Off
Gas Safety	Lettings Landlord	On
Landlord Particulars	Lettings Landlord	Off
Landlord-Instructions to let	Lettings Landlord	Off
Landlord-Property being Advertised		Off

### 3 Click "Landlords"



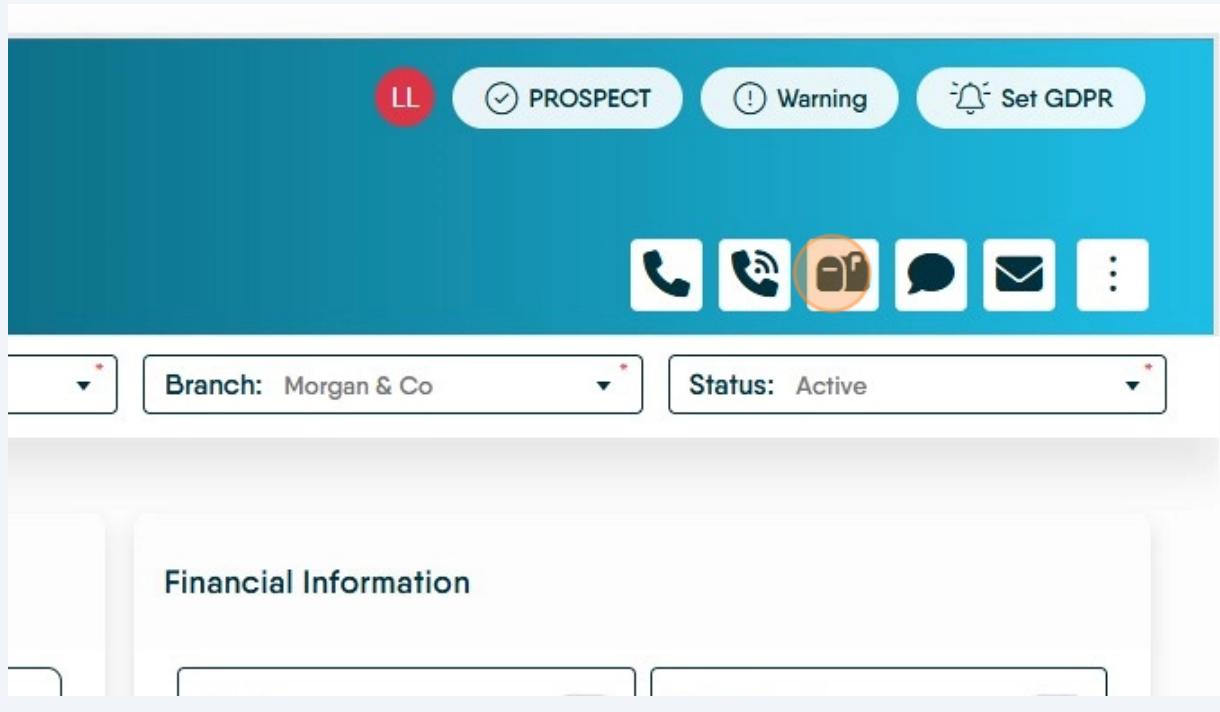
The screenshot shows the 'General' dashboard of the iam property software. At the top, there are navigation links: 'My day', 'Lettings' (with a dropdown arrow), 'Sales' (with a dropdown arrow), 'Accounts' (with a dropdown arrow), 'Reporting' (with a dropdown arrow), 'Communications' (with a dropdown arrow), and a yellow 'My account' button. Below the navigation is a breadcrumb trail: 'Lettings dashboard' > 'General' > 'Property management'. The main area is titled 'General' and contains several sections: 'Property Match', 'Properties' (with a highlighted 'Landlords' link), 'Applicants', 'Reports', 'Applicant Match', 'Contractors', 'E-sign', 'Letzone', 'Tenants', 'Guarantors', 'Upload to portals', and 'Marketing toolkit'. At the bottom, there are tabs for 'Letters' and 'E-sign', and a search bar with the placeholder 'Search in Landlords'.

### 4 Find your landlord and click "View Landlord"

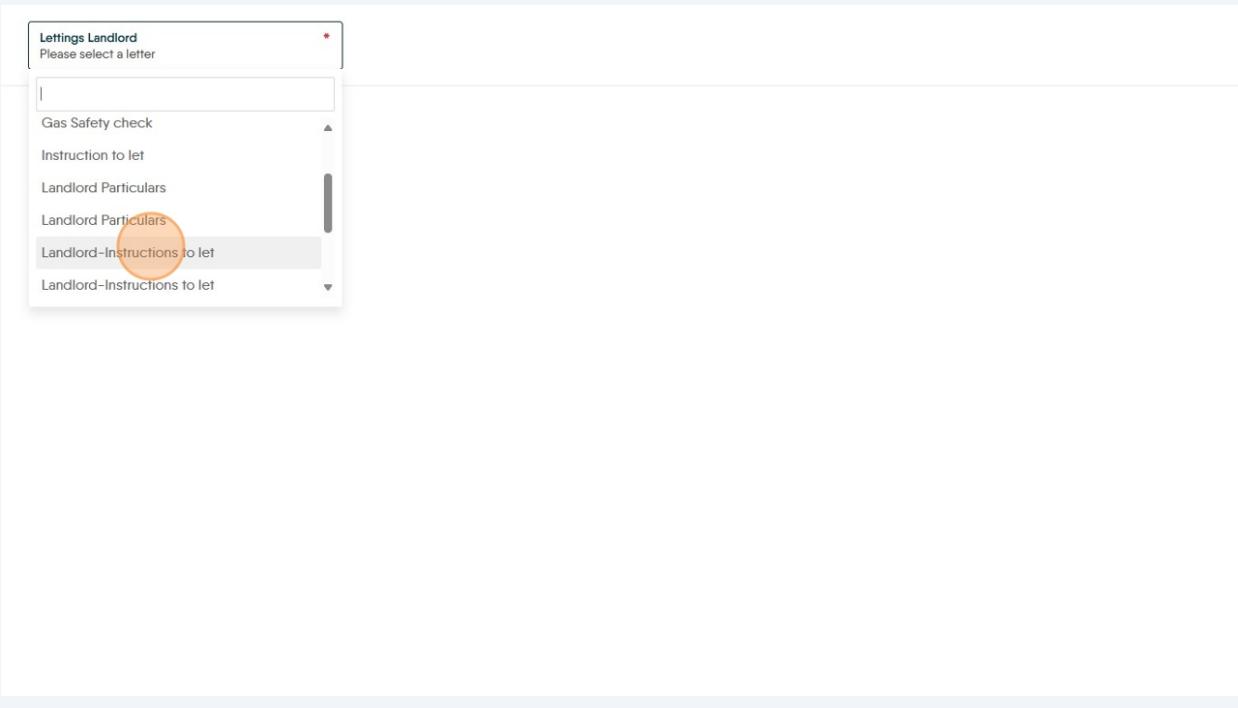


The screenshot shows the 'Search in Landlords' page. The top navigation bar includes links for 'Properties', 'Landlords 68', 'Tenants', 'Lettings Applicants', 'Contractors', 'Guarantors', 'Sales Properties', 'Vendors', 'Sales Applicants', and 'Solicitors'. Below the navigation is a search bar with the placeholder 'Search in Landlords' and a 'Search' button. The main content area displays a grid of landlord profiles. Each profile includes a circular icon with initials (e.g., LL, DM), the landlord's name, email, and address, and a 'View Landlord' button. The third profile from the left, belonging to 'Mr David Morgan', has its 'View Landlord' button highlighted with a yellow circle.

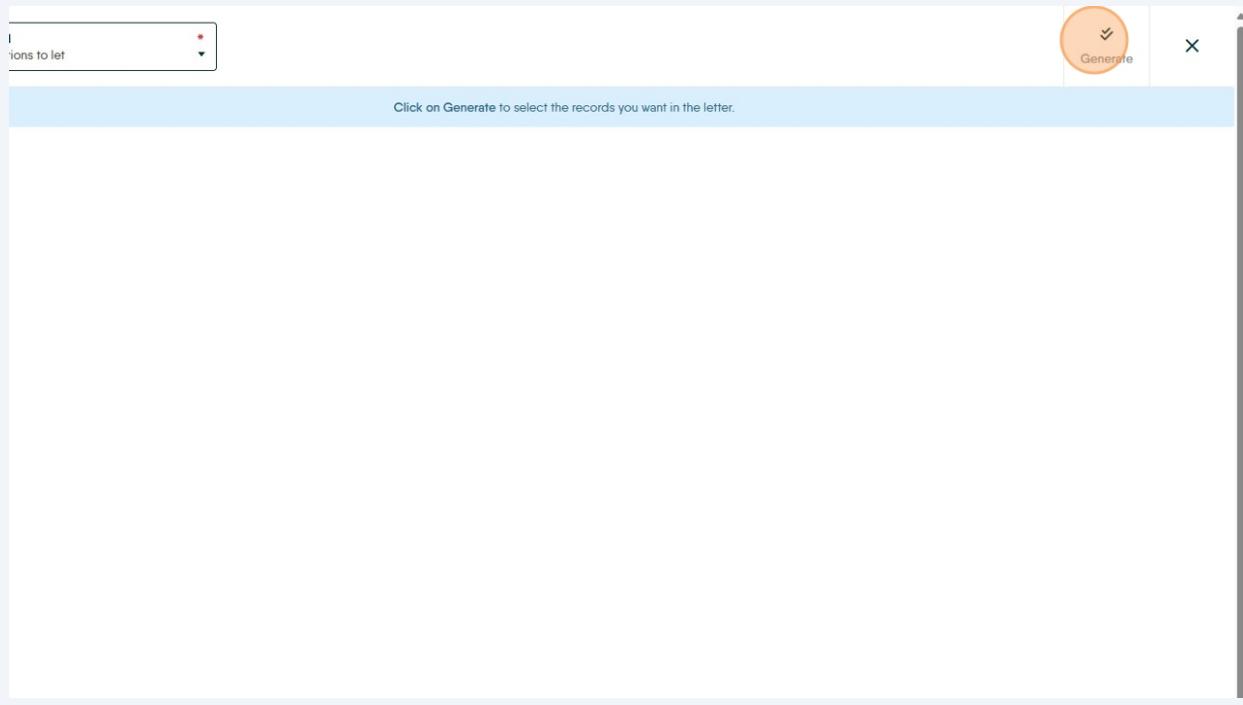
5 Once in the selected record, click "Letters"



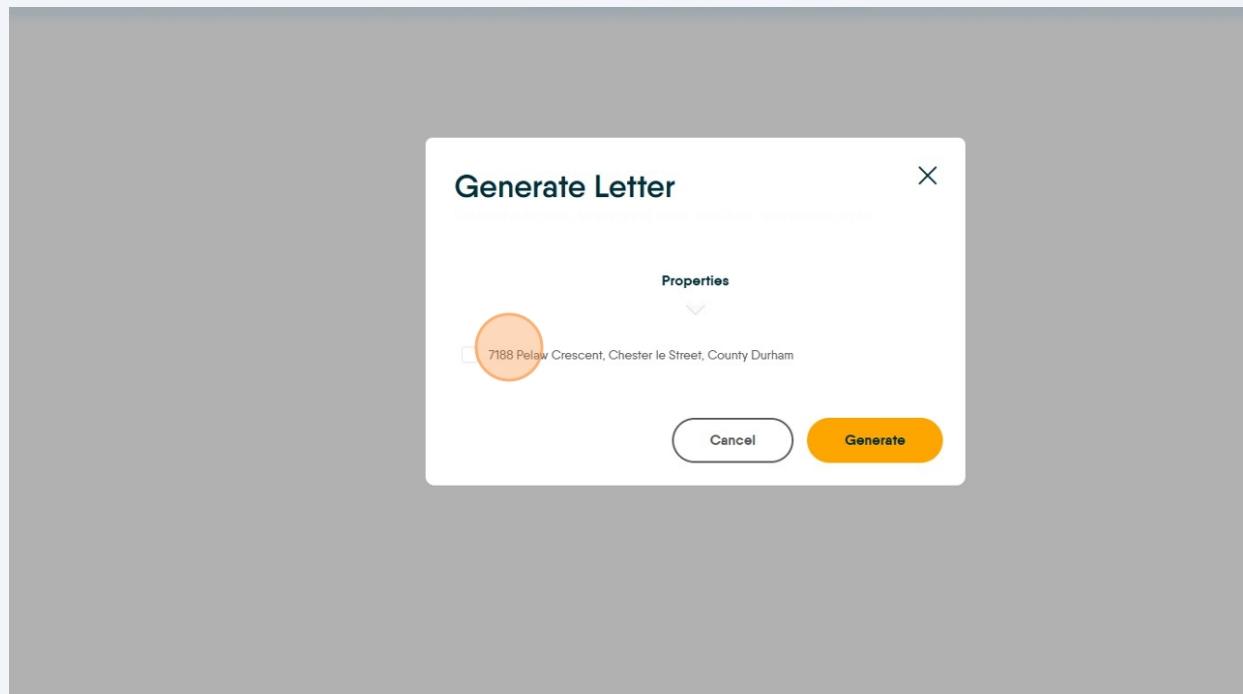
6 From the drop down menu select the letter you are sending.



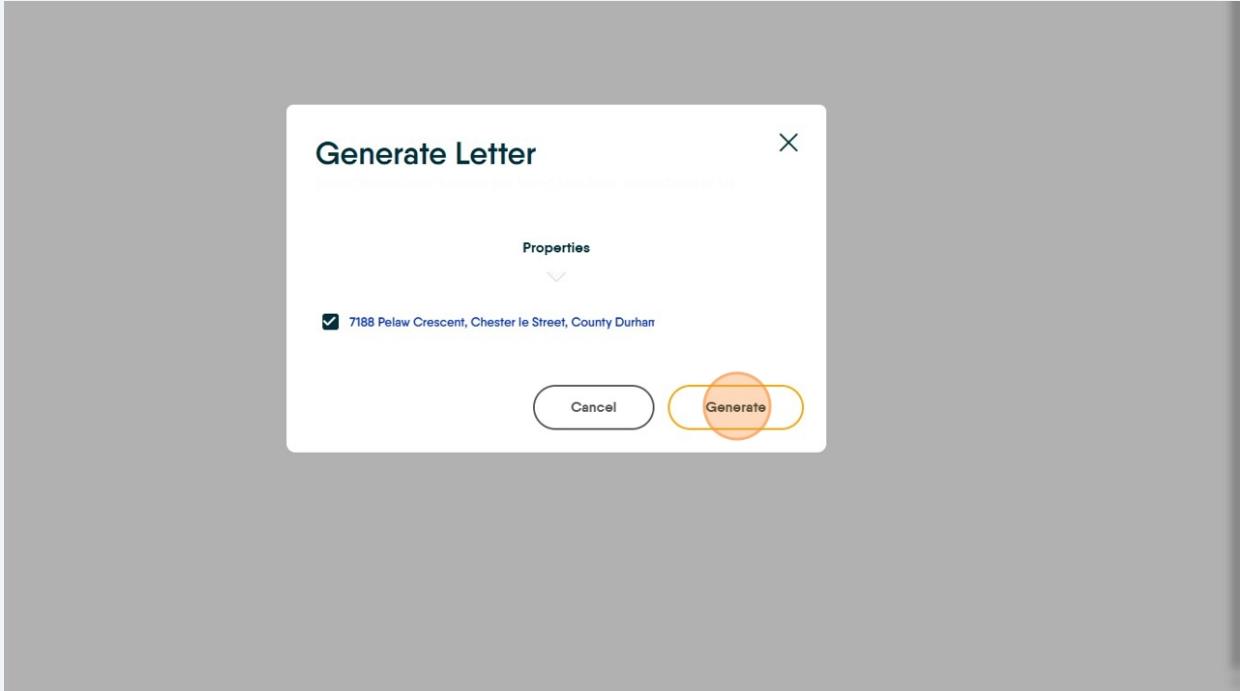
7 Click "Generate"



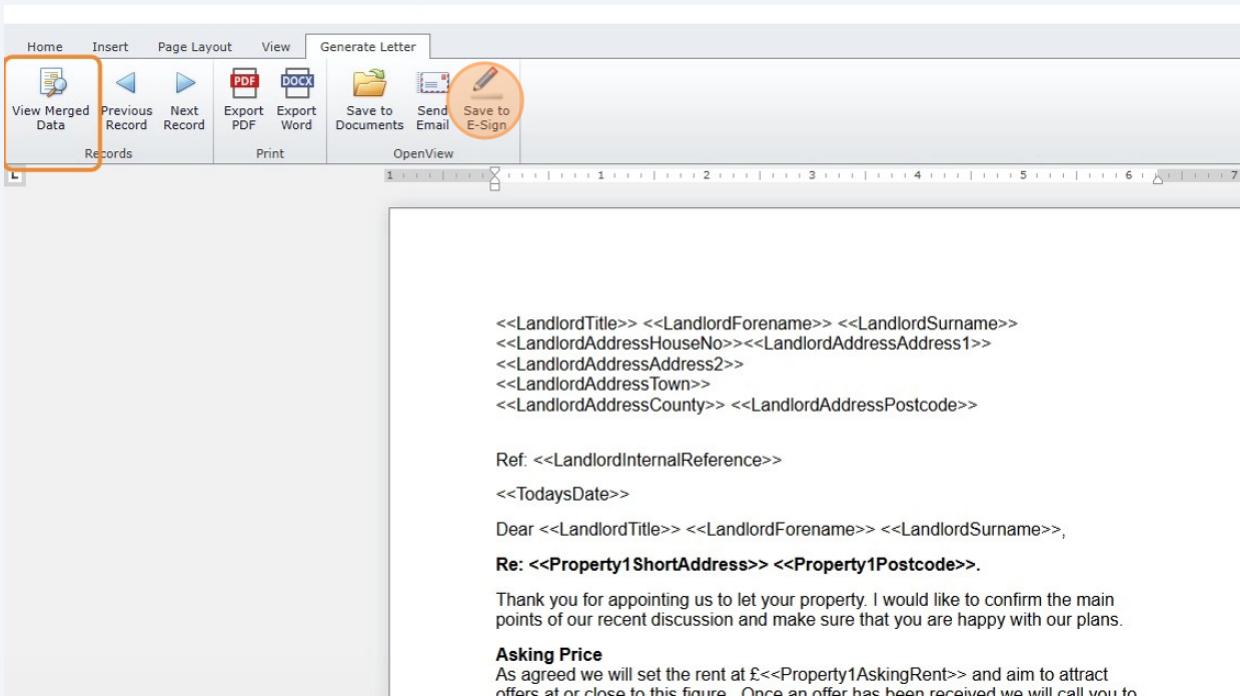
8 Depending on the letter, you may have options to select at this point, complete as appropriate.



9 Click "Generate" the letter will now be created and show on the screen with all merge tags visible.



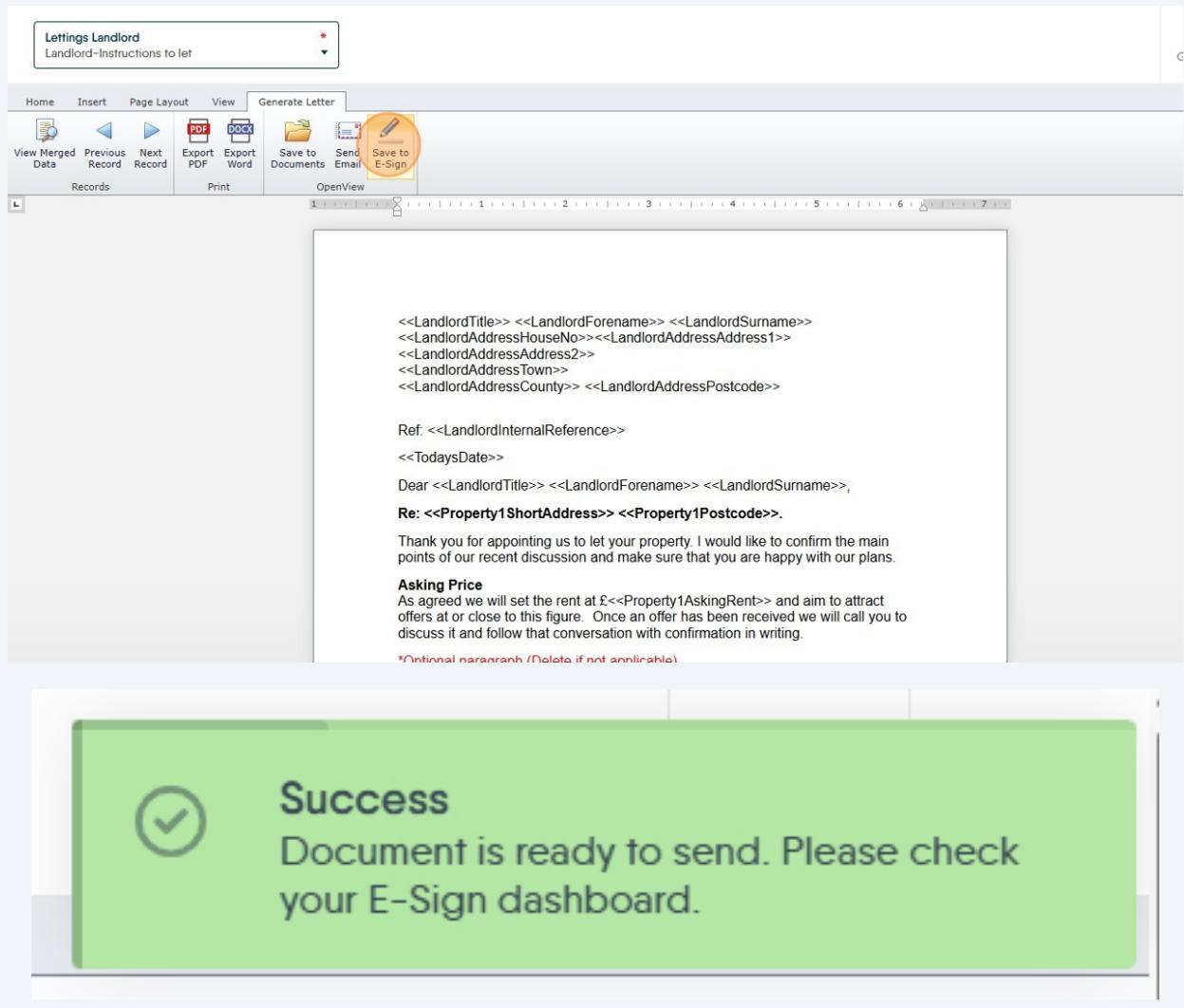
10 You can check the Merged Data by clicking on the 'View Merged Data' icon in the menu bar (highlighted) Click "Save to E-Sign"



11

Click "Save to E-Sign"

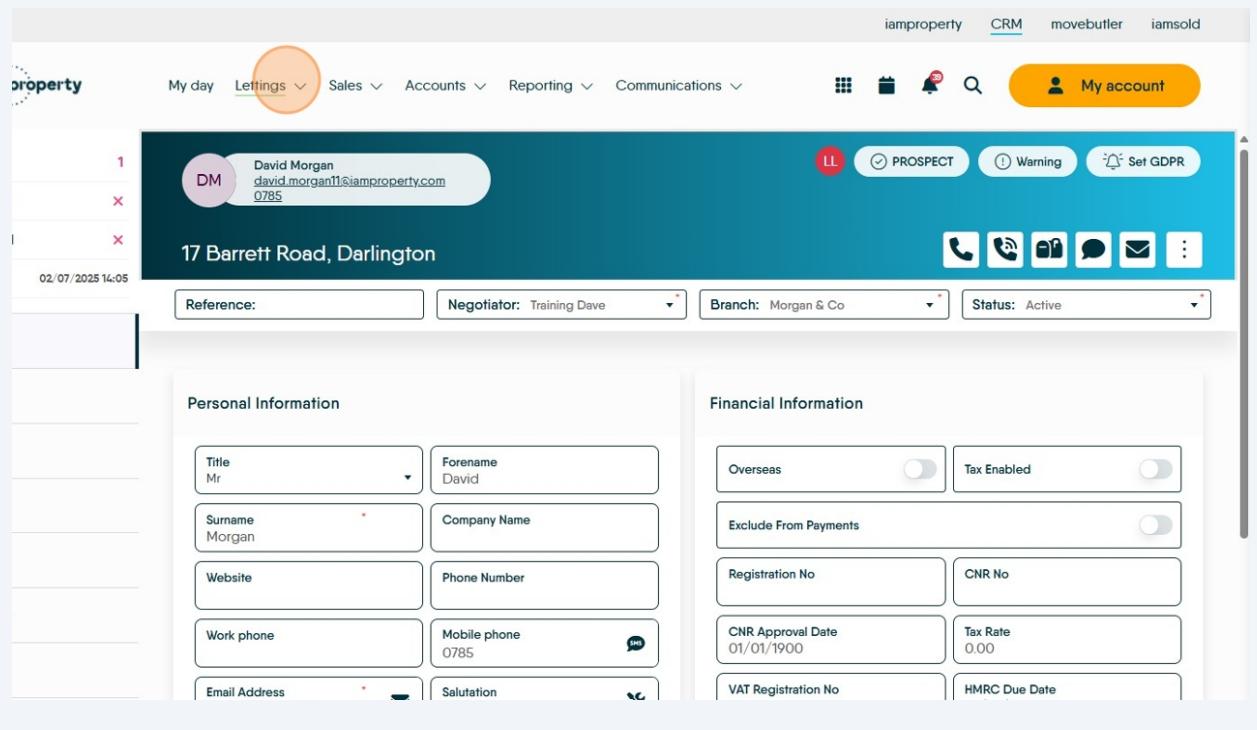
If this is successful you will see this message in the top right of the screen.



12

The E-Signed document will be created and added to E-Sign message list to be sent, to send the e-sign envelope.

## 13 Click "Lettings"



My day Lettings Sales Accounts Reporting Communications

1 David Morgan david.morgan11@iamproperty.com 0785

17 Barrett Road, Darlington

Reference: Negotiator: Training Dave Branch: Morgan & Co Status: Active

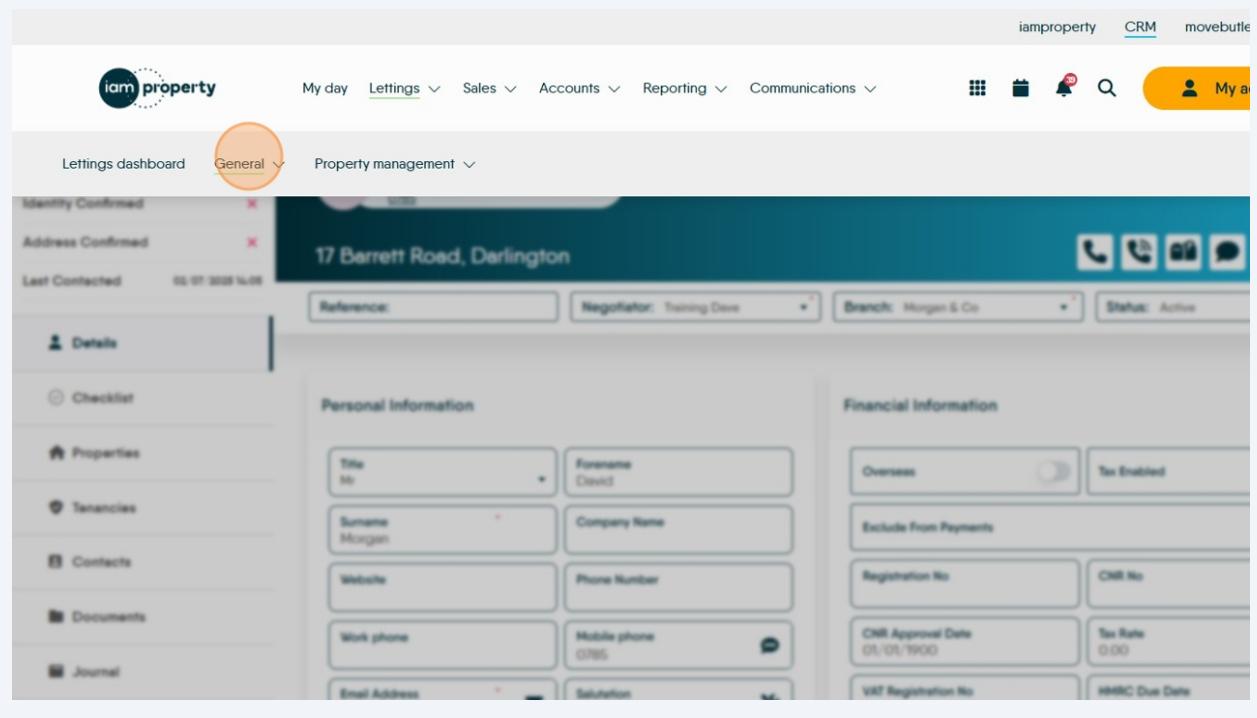
Personal Information

Title: Mr	Forename: David
Surname: Morgan	Company Name
Website	Phone Number
Work phone	Mobile phone 0785
Email Address	Salutation

Financial Information

Overseas	Tax Enabled
Exclude From Payments	
Registration No	CNR No
CNR Approval Date 01/01/1900	Tax Rate 0.00
VAT Registration No	HMRC Due Date

## 14 Click "General"



My day Lettings Sales Accounts Reporting Communications

Lettings dashboard General Property management

Identity Confirmed Address Confirmed Last Contacted 02/07/2025 14:05

17 Barrett Road, Darlington

Reference: Negotiator: Training Dave Branch: Morgan & Co Status: Active

Details

Checklist

Properties

Tenancies

Contacts

Documents

Journal

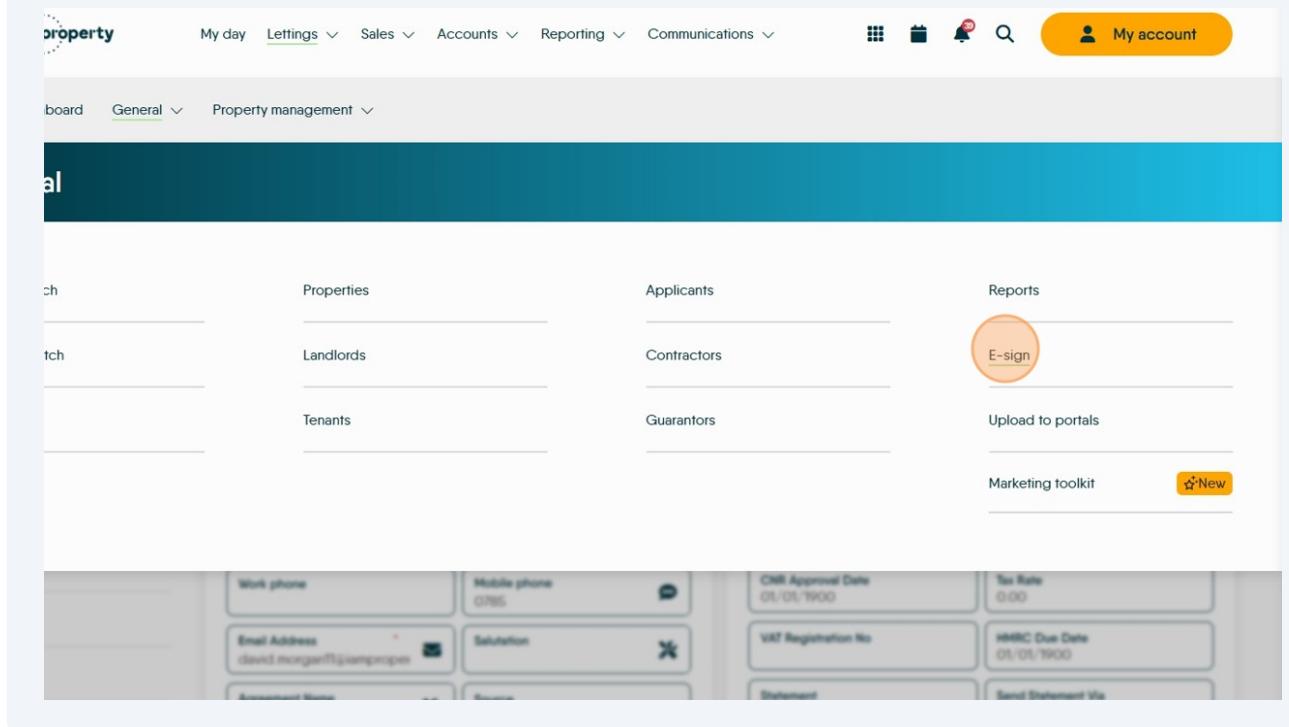
Personal Information

Title: Mr	Forename: David
Surname: Morgan	Company Name
Website	Phone Number
Work phone	Mobile phone 0785
Email Address	Salutation

Financial Information

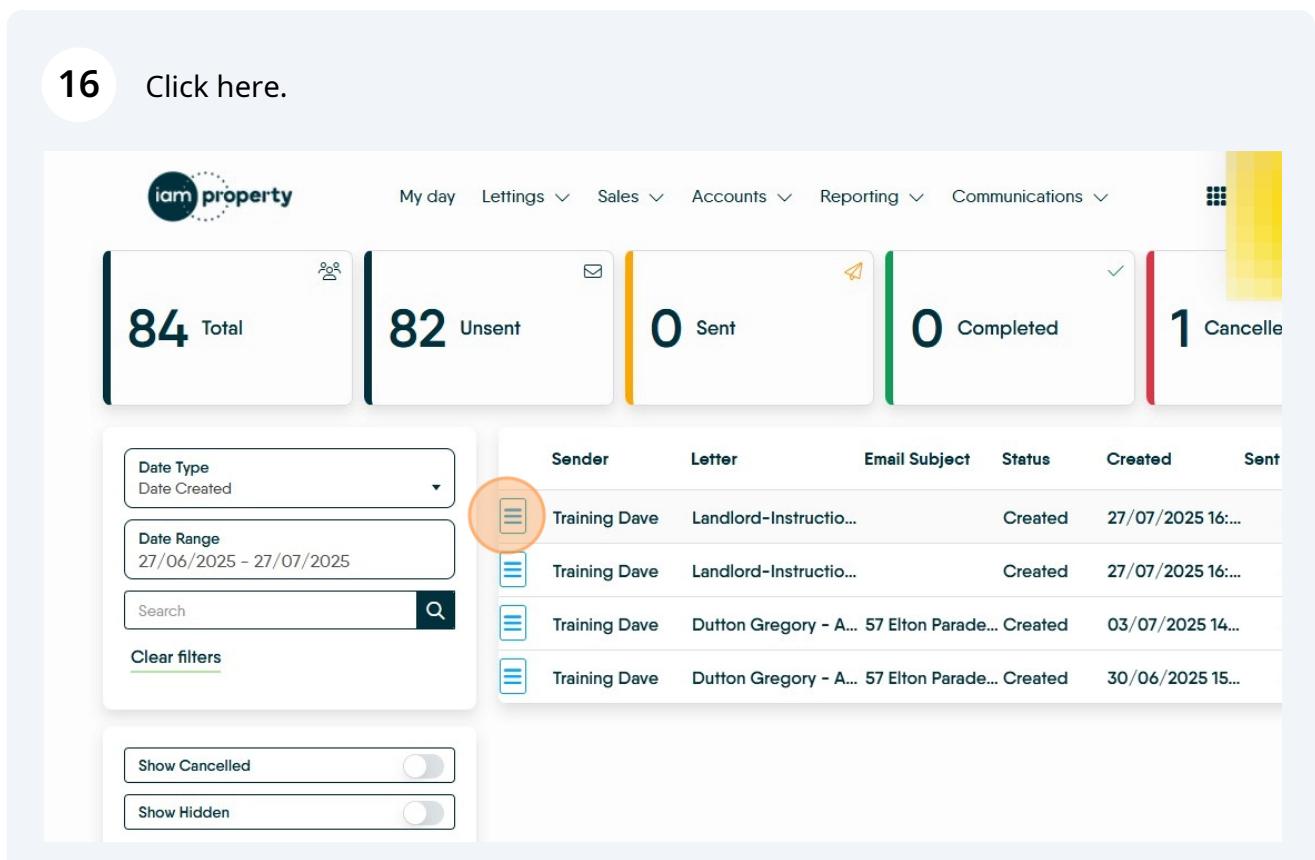
Overseas	Tax Enabled
Exclude From Payments	
Registration No	CNR No
CNR Approval Date 01/01/1900	Tax Rate 0.00
VAT Registration No	HMRC Due Date

## 15 Click "E-sign"



The screenshot shows the 'Property' software interface. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. Below the navigation is a breadcrumb trail: 'Dashboard' > 'General' > 'Property management'. The main area is titled 'General' and contains sections for 'Properties', 'Landlords', 'Tenants', 'Applicants', 'Contractors', 'Guarantors', and 'Reports'. The 'Reports' section includes a button labeled 'E-sign', which is highlighted with a red circle. Other buttons in this section are 'Upload to portals' and 'Marketing toolkit'. A preview of a document with various fields like 'Work phone', 'Mobile phone', 'CRM Approval Date', 'Tax Rate', etc., is shown below the reports section.

## 16 Click here.



The screenshot shows the 'Communications' section of the software. It displays a summary of communication status: 84 Total, 82 Unsent, 0 Sent, 0 Completed, and 1 Cancelled. Below this, there is a table of sent communications. The first column of the table is 'Sender', which is highlighted with a red circle. The table data is as follows:

Sender	Letter	Email Subject	Status	Created	Sent
Training Dave	Landlord-Instructio...		Created	27/07/2025 16...	
Training Dave	Landlord-Instructio...		Created	27/07/2025 16...	
Training Dave	Dutton Gregory - A... 57 Elton Parade...	Created	Created	03/07/2025 14...	
Training Dave	Dutton Gregory - A... 57 Elton Parade...	Created	Created	30/06/2025 15...	

On the left, there are filters for 'Date Type' (set to 'Date Created'), 'Date Range' (set to '27/06/2025 - 27/07/2025'), a 'Search' bar, and buttons for 'Clear filters', 'Show Cancelled' (disabled), and 'Show Hidden' (disabled).

## 17 Click "Send"

The screenshot shows the iam property software interface. At the top, there is a navigation bar with links: My day, Lettings, Sales, Accounts, Reporting, Communications, and a grid icon. Below the navigation bar, there are five summary cards: Total (84), Unsent (82), Sent (0), Completed (0), and Cancelled (1). The 'Cancelled' card has a yellow background. Below these cards is a search and filter section with fields for Date Type (Date Created), Date Range (27/06/2025 - 27/07/2025), a Search input field with a magnifying glass icon, and a 'Clear filters' link. At the bottom, there are two toggle switches: 'Show Cancelled' and 'Show Hidden'. To the right, a detailed view of a task is shown. The task is from 'Training Dave' with the subject 'Landlord-Instructio...'. A context menu is open over the task, with the 'Send' option highlighted and circled in orange. Other options in the menu include Status, Download Document, Cancel, and Hide.

18 Click "Send Envelope  
Landlord-Instructions to let - Sender: Training Dave"

# Send Envelope

Email Subject \*  
Email Subject

= 1. Landlord(s)

Name	Email	Status	Sent	Completed
 David Morgan	david.morgan11@iamproperty.com	Created	-	-

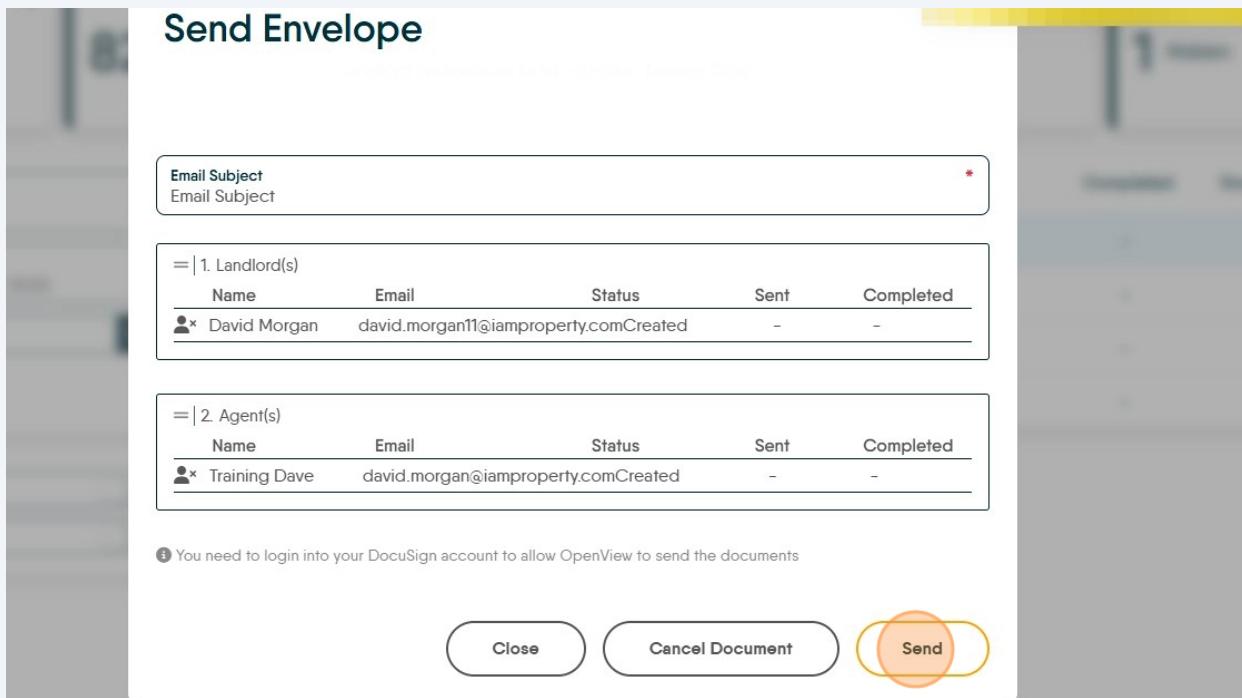
= 2. Agent(s)

Name	Email	Status	Sent	Completed
 Training Dave	david.morgan@iamproperty.com	Created	-	-

i You need to login into your DocuSign account to allow OpenView to send the documents

Close Cancel Document Send

**19** Click "Send"



**20**

The E-Sign document (known as an envelope) will be sent and when signed will show in the e-sign tab of the record it was sent from e.g. in this case in the Landlord record