

# 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.

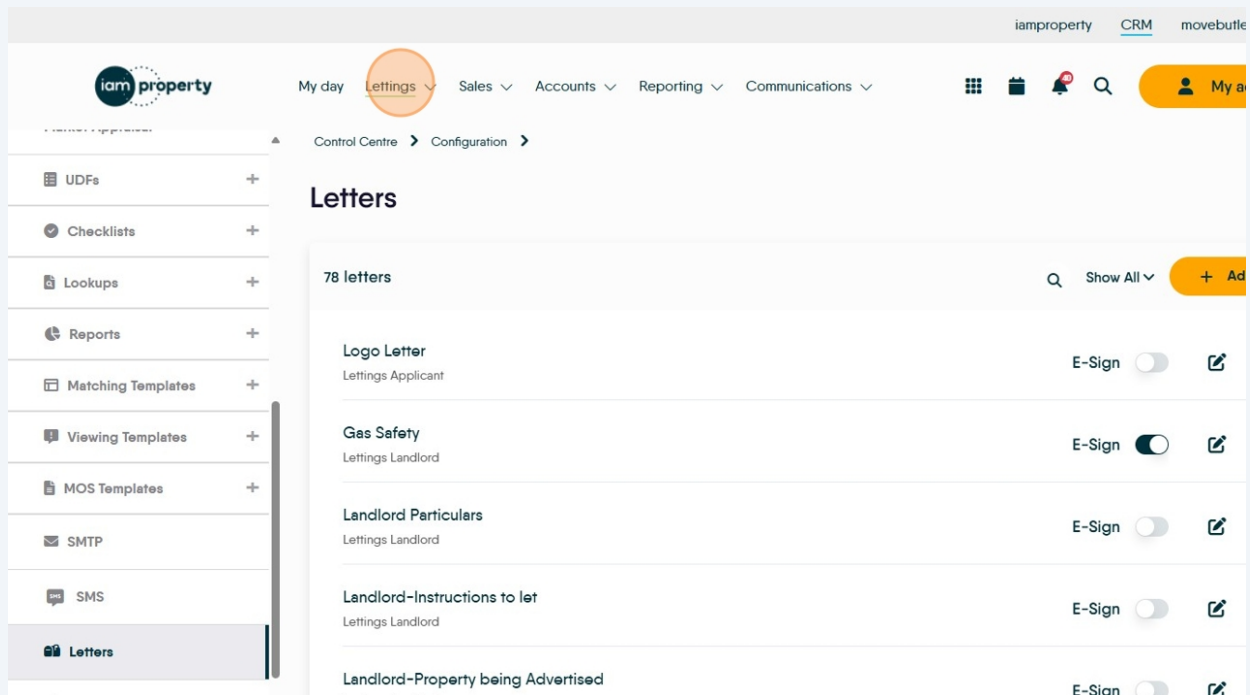
## Sending Via E-Sign



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

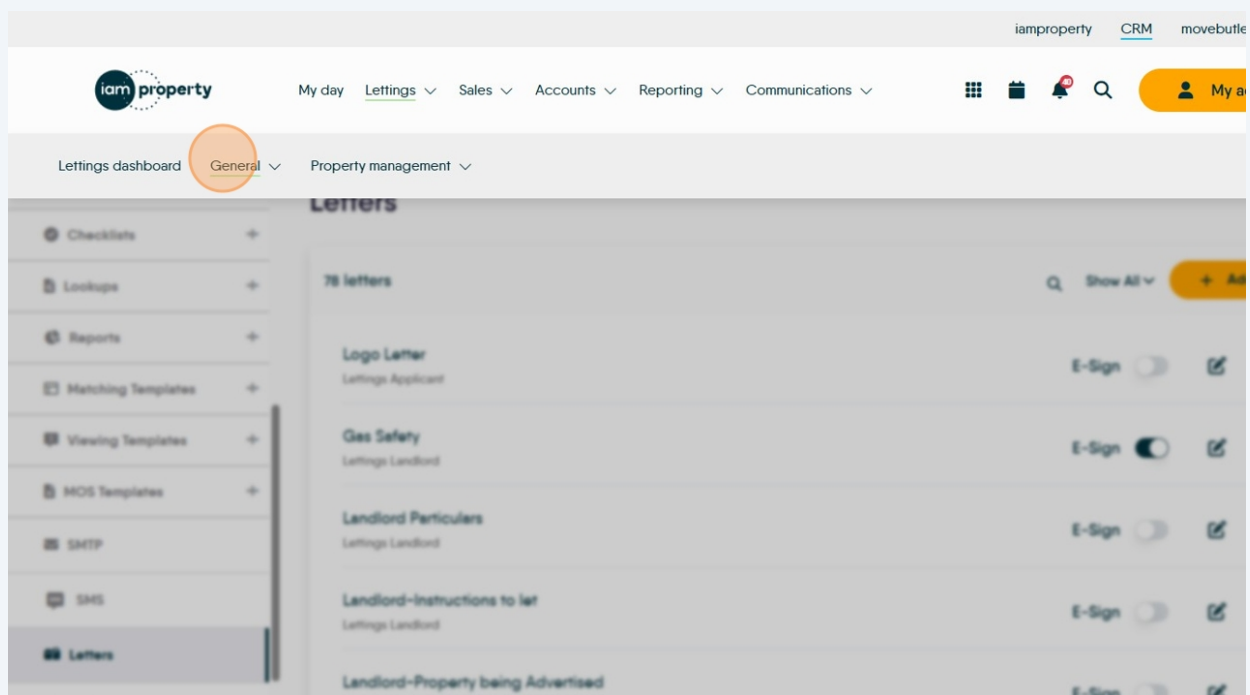
Click "Lettings" or "Sales" depending on document type or search for the Record you are sending the letter from. Alternatively use the 'Search' function.



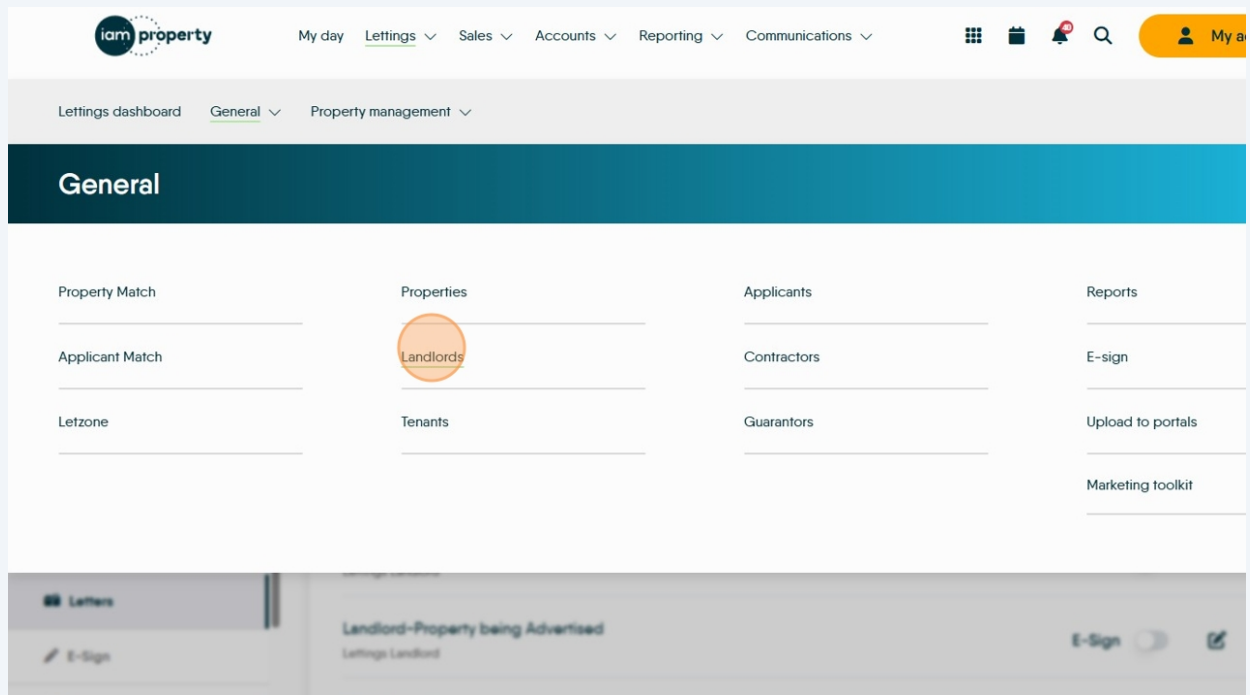
2

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

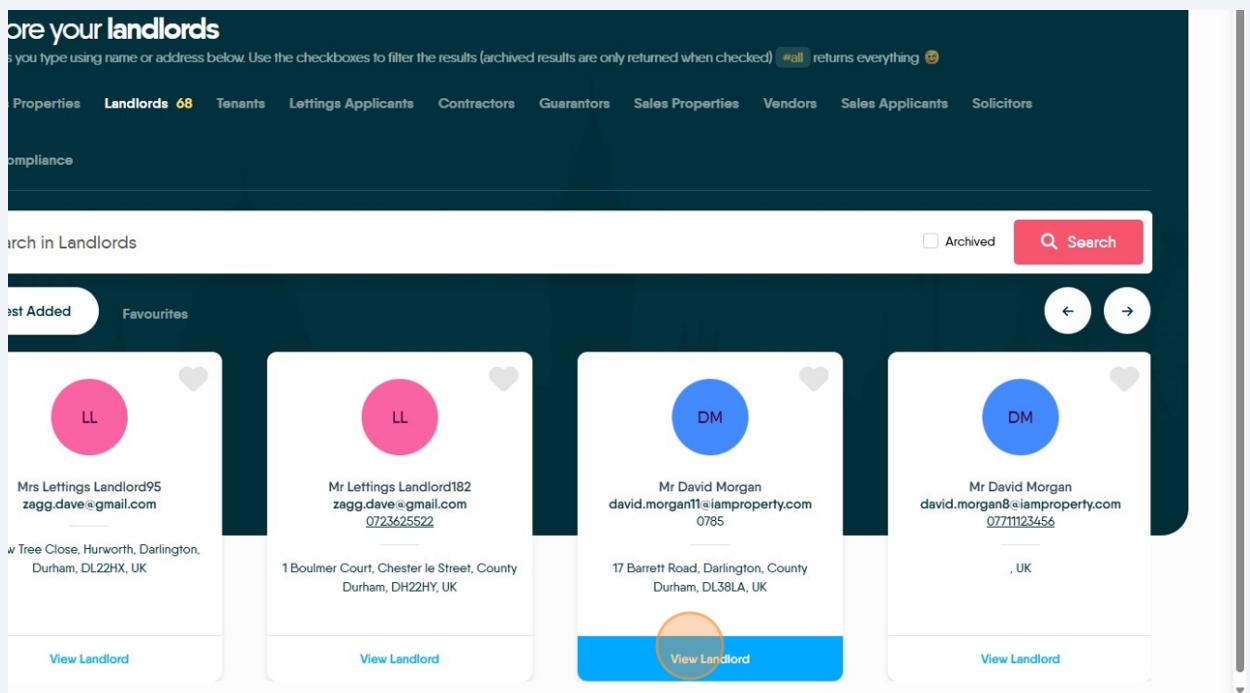
Click "General"



### 3 Click "Landlords"



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



5 Once in the selected record, click "Letters"

LL PROSPECT Warning Set GDPR

Phone Mobile Letters Chat Email Menu

Branch: Morgan & Co Status: Active

Financial Information

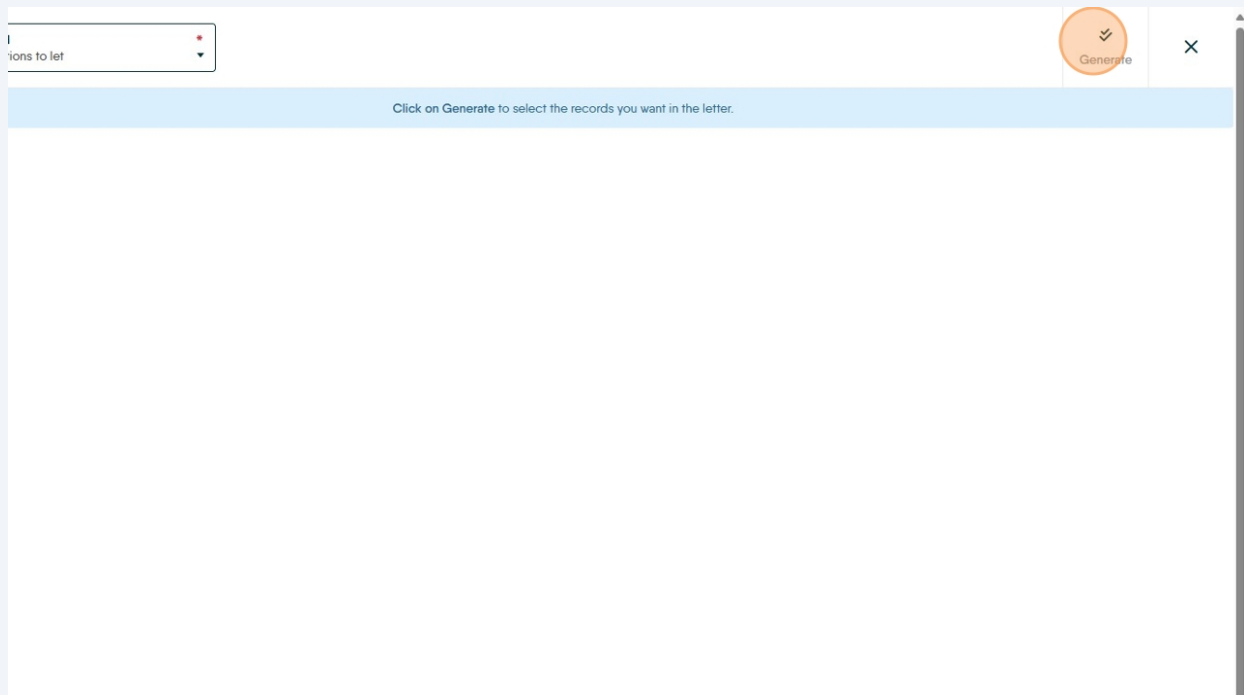
6 From the drop down menu select the letter you are sending.

Lettings Landlord  
Please select a letter

- Gas Safety check
- Instruction to let
- Landlord Particulars
- Landlord-Instructions to let
- Landlord-Instructions to let

7

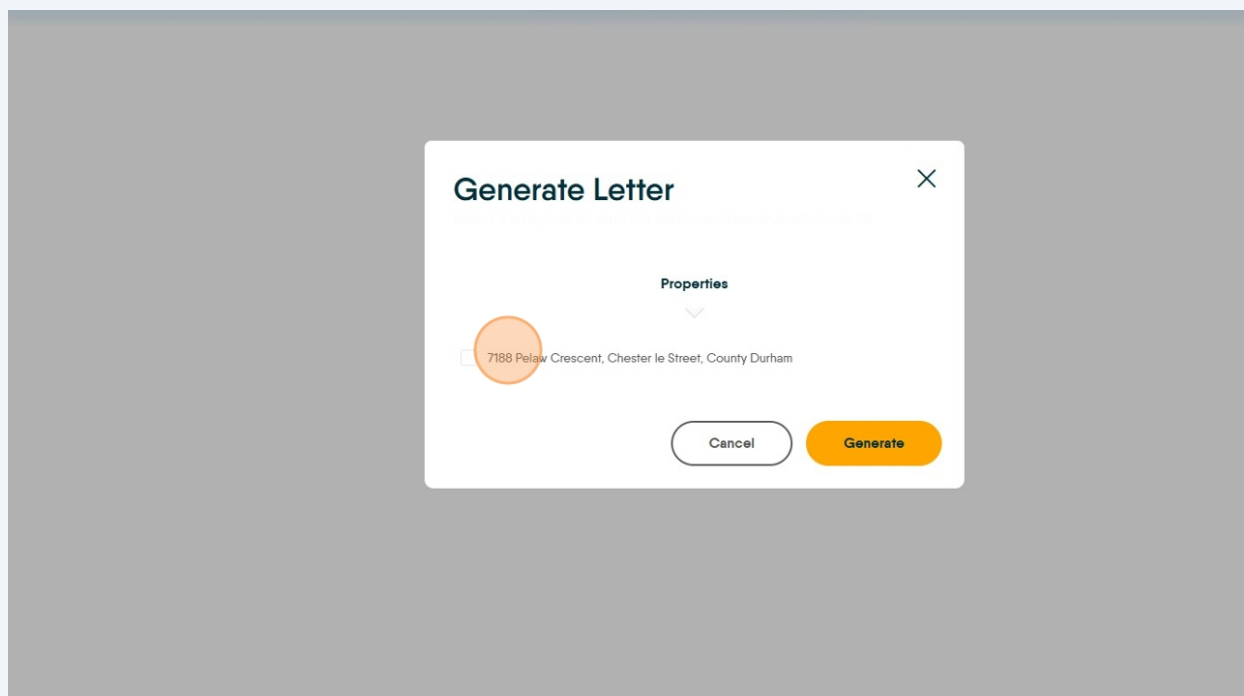
Click "Generate"



A screenshot of a web application interface. At the top left, there is a dropdown menu with the text "ions to let" and a small red asterisk icon. To the right of this menu is a blue bar containing the text "Click on Generate to select the records you want in the letter." Below this bar is a large, empty white rectangular area. In the top right corner of the interface, there is an orange circular button with a white checkmark icon and the word "Generate" below it, and a grey "X" icon to its right.

8

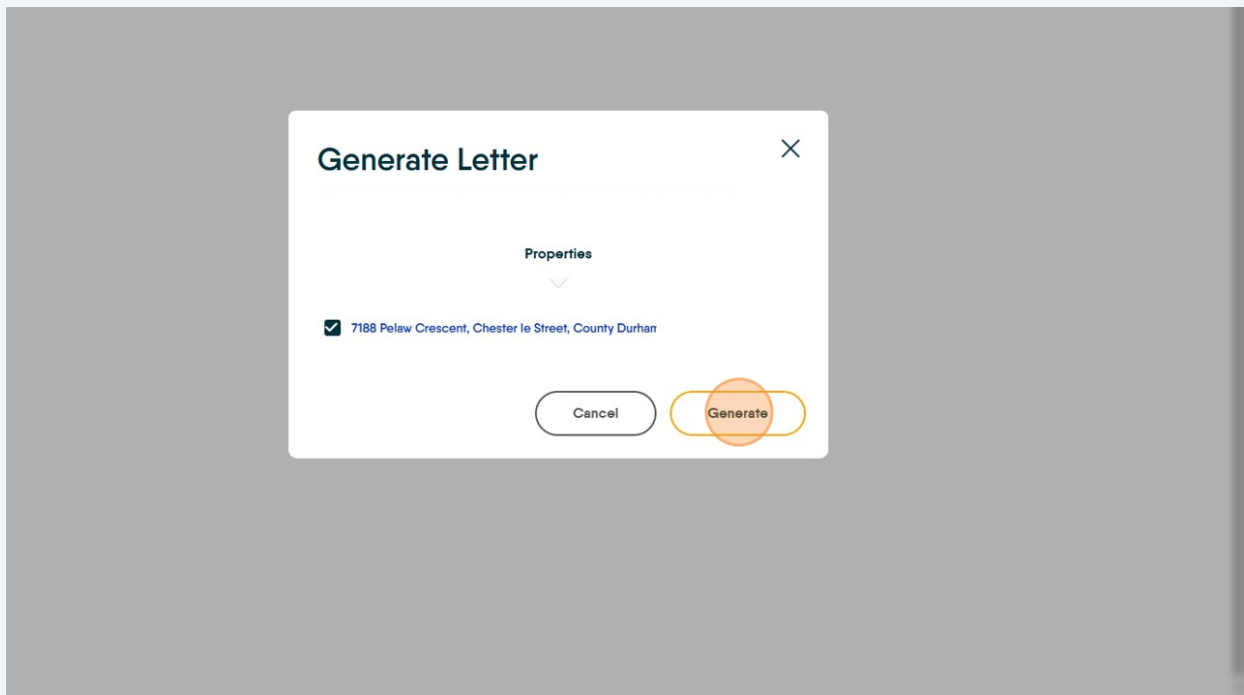
Depending on the letter, you may have options to select at this point, complete as appropriate.



A screenshot of a "Generate Letter" dialog box. The dialog has a title bar with the text "Generate Letter" and a close button (X). Below the title bar, there is a section labeled "Properties" with a downward arrow. Under "Properties", there is a checkbox and the text "7188 Pelaw Crescent, Chester le Street, County Durham". At the bottom of the dialog, there are two buttons: "Cancel" and "Generate". The "Generate" button is orange and highlighted with a red circle.

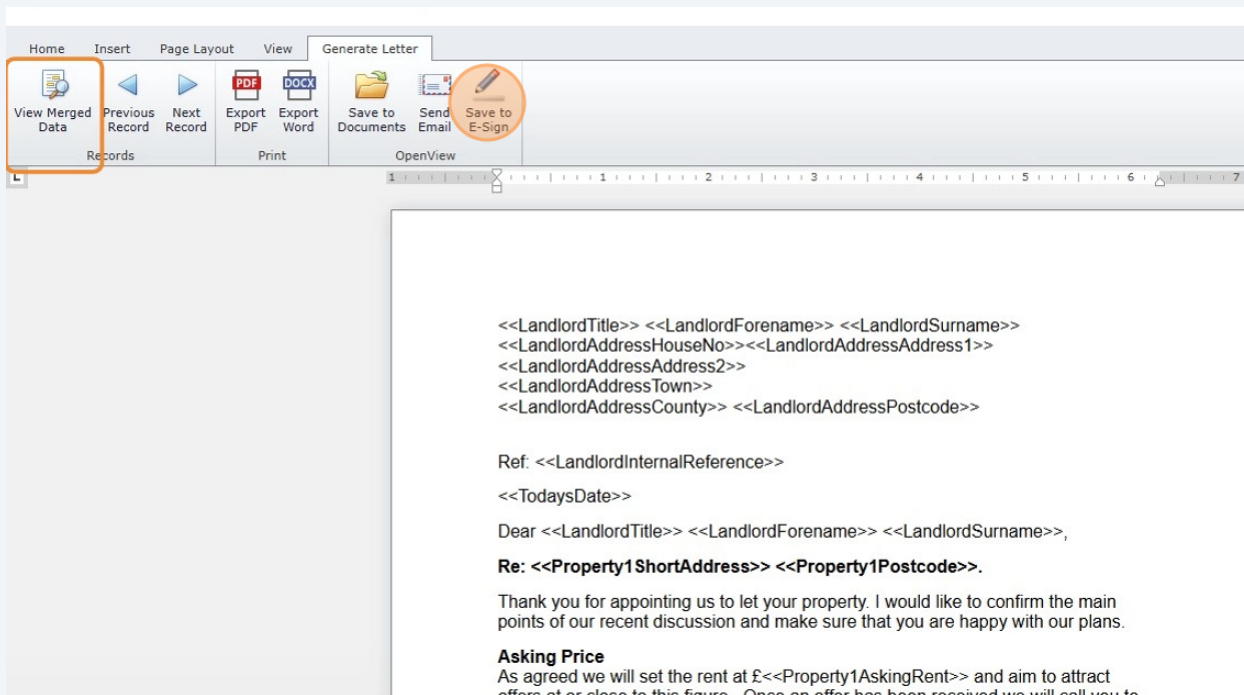
9

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.

Lettings Landlord  
Landlord-Instructions to let

Home Insert Page Layout View Generate Letter

View Merged Data Previous Record Next Record Export PDF Export Word Save to Documents Send Email Save to E-Sign

Records Print OpenView

1 2 3 4 5 6 7

<<LandlordTitle>> <<LandlordForename>> <<LandlordSurname>>  
 <<LandlordAddressHouseNo>><<LandlordAddressAddress1>>  
 <<LandlordAddressAddress2>>  
 <<LandlordAddressTown>>  
 <<LandlordAddressCounty>> <<LandlordAddressPostcode>>

Ref: <<LandlordInternalReference>>

<<TodaysDate>>

Dear <<LandlordTitle>> <<LandlordForename>> <<LandlordSurname>>,

**Re: <<Property1 ShortAddress>> <<Property1Postcode>>.**

Thank you for appointing us to let your property. I would like to confirm the main points of our recent discussion and make sure that you are happy with our plans.

**Asking Price**  
 As agreed we will set the rent at £<<Property1AskingRent>> and aim to attract offers at or close to this figure. Once an offer has been received we will call you to discuss it and follow that conversation with confirmation in writing.

\*Optional paragraph (Delete if not applicable)



## Success

Document is ready to send. Please check your E-Sign dashboard.

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"

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My day **Lettings** Sales Accounts Reporting Communications

David Morgan  
david.morgan1@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"

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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

**Personal Information**

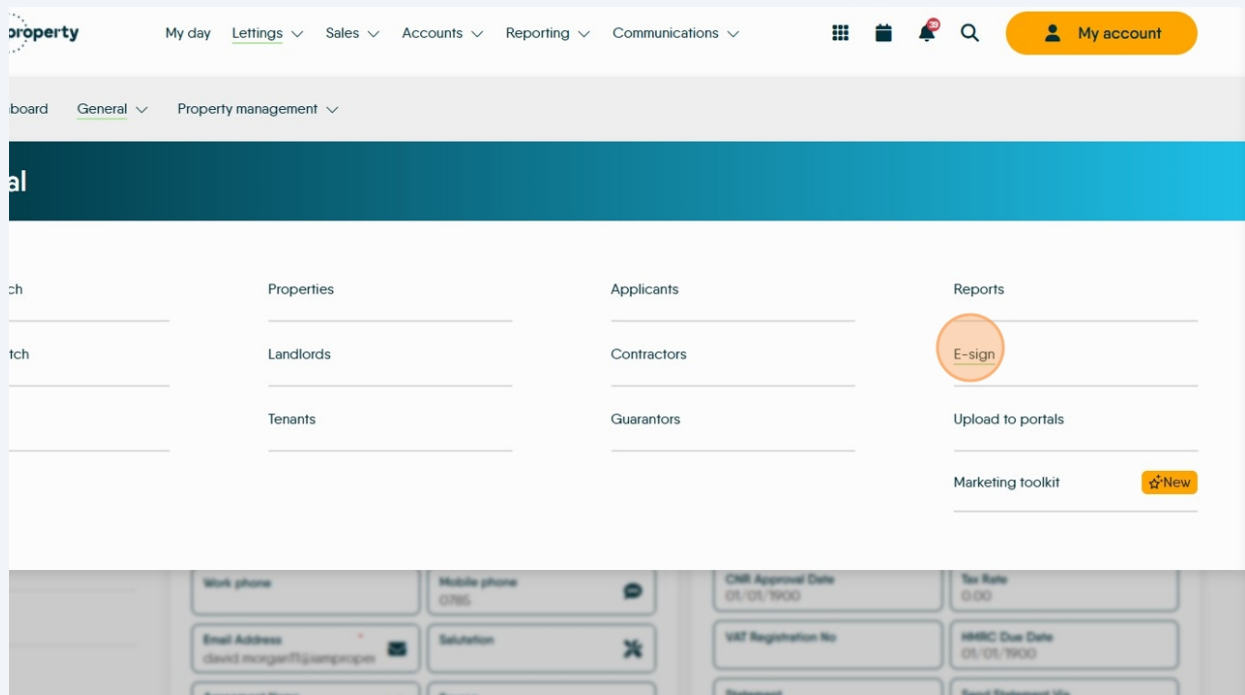
Title Mr	Forename David
Surname Morgan	Company Name
Website	Phone Number
Work phone	Mobile phone 0785
Email Address	Salutation

**Financial Information**

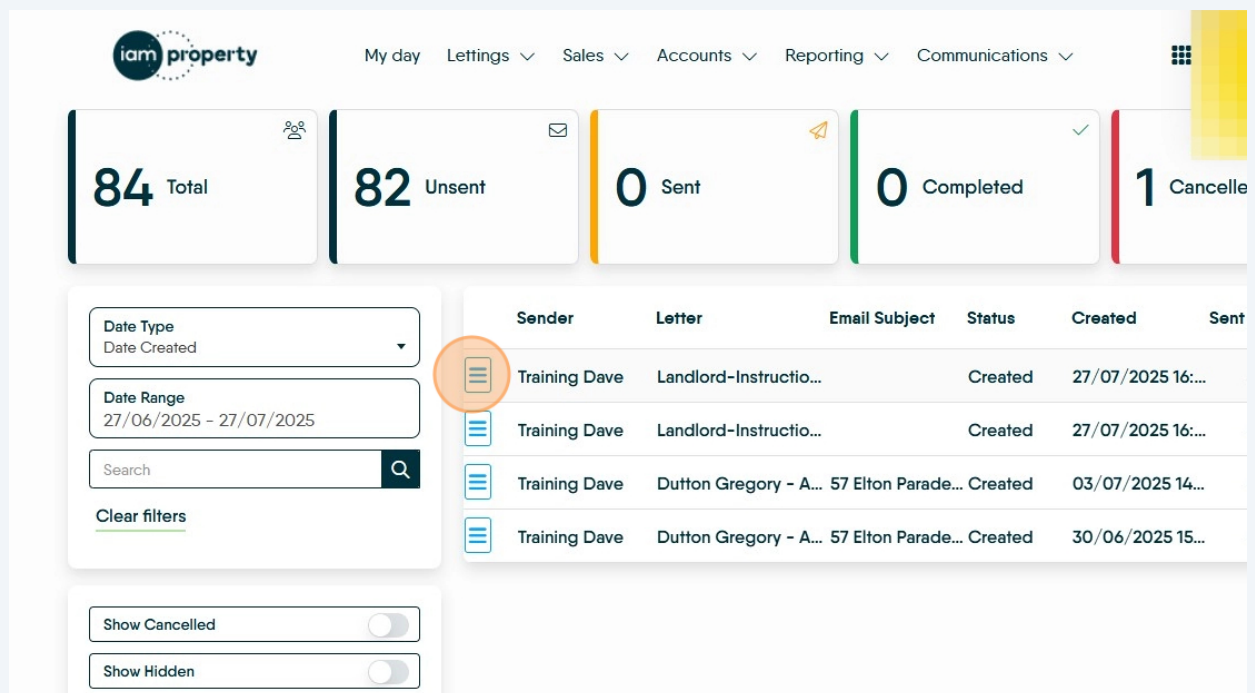
Overseas	Tax Enabled
Exclude From Payments	
Registration No	CNR No
CNR Approval Date 01/01/1900	Tax Rate 0.00
VAT Registration No	HMRC Due Date



## 15 Click "E-sign"



## 16 Click here.



## 17 Click "Send"

The screenshot shows the 'iam property' dashboard with navigation tabs: My day, Lettings, Sales, Accounts, Reporting, and Communications. The dashboard displays five summary cards: 84 Total, 82 Unsent, 0 Sent, 0 Completed, and 1 Cancelled. On the left, there are filters for Date Type (Date Created), Date Range (27/06/2025 - 27/07/2025), a search bar, and toggle switches for 'Show Cancelled' and 'Show Hidden'. The main table lists email envelopes with columns: Sender, Letter, Email Subject, Status, Created, and Sent. A context menu is open over the first row, showing options: Send, Status, Download Document, Cancel, and Hide.

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

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

The 'Send Envelope' dialog box is shown with a title bar and a close button. It contains a form for 'Email Subject' and two sections for recipients: '1. Landlord(s)' and '2. Agent(s)'. Each section has a table with columns: Name, Email, Status, Sent, and Completed. A message at the bottom states: 'You need to login into your DocuSign account to allow OpenView to send the documents'. At the bottom right, there are three buttons: 'Close', 'Cancel Document', and 'Send'.

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	-	-

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

Close Cancel Document Send

## 19 Click "Send"

### Send Envelope

[Cancel Document](#) [Cancel Document](#) [Cancel Document](#)

**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	-	-

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

Close

Cancel Document

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