

Ensuring All Contacts are Copied in on Email or SMS



This guide provides a straightforward method for ensuring all relevant contacts are included in your email or SMS communications.

By following the outlined steps, users can manage their contact lists.

1 Navigate to the record you are sending the message from.

The screenshot displays the 'iam property' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. A sidebar on the left lists various modules: 'ps', 'Confirmed', 'Confirmed', 'tacted', 'Details', 'Checklist', 'Properties', 'enancies', 'Contacts', 'Documents', 'Journal', and 'Sign'. The main content area shows a contact record for 'David Morgan' with email 'david.morgan11@iamproperty.com' and phone '0785'. The address '17 Barrett Road, Darlington' is listed. Below this, there are fields for 'Reference:', 'Negotiator: Training Dave', 'Branch: Morgan & Co', and 'Status: Active'. The record is divided into two sections: 'Personal Information' and 'Financial Information'. The 'Personal Information' section includes fields for Title (Mr), Forename (David), Surname (Morgan), Company Name, Website, Phone Number, Work phone, Mobile phone (0785), Email Address (david.morgan11@iamproper), Salutation, Agreement Name, and Source. The 'Financial Information' section includes toggle switches for 'Overseas' and 'Tax Enabled', a toggle for 'Exclude From Payments', and fields for 'Registration No', 'CNR No', 'CNR Approval Date' (01/01/1900), 'Tax Rate' (0.00), 'VAT Registration No', 'HMRC Due Date' (01/01/1900), 'Statement' (No Statement), and 'Send Statement Via' (Email).

2

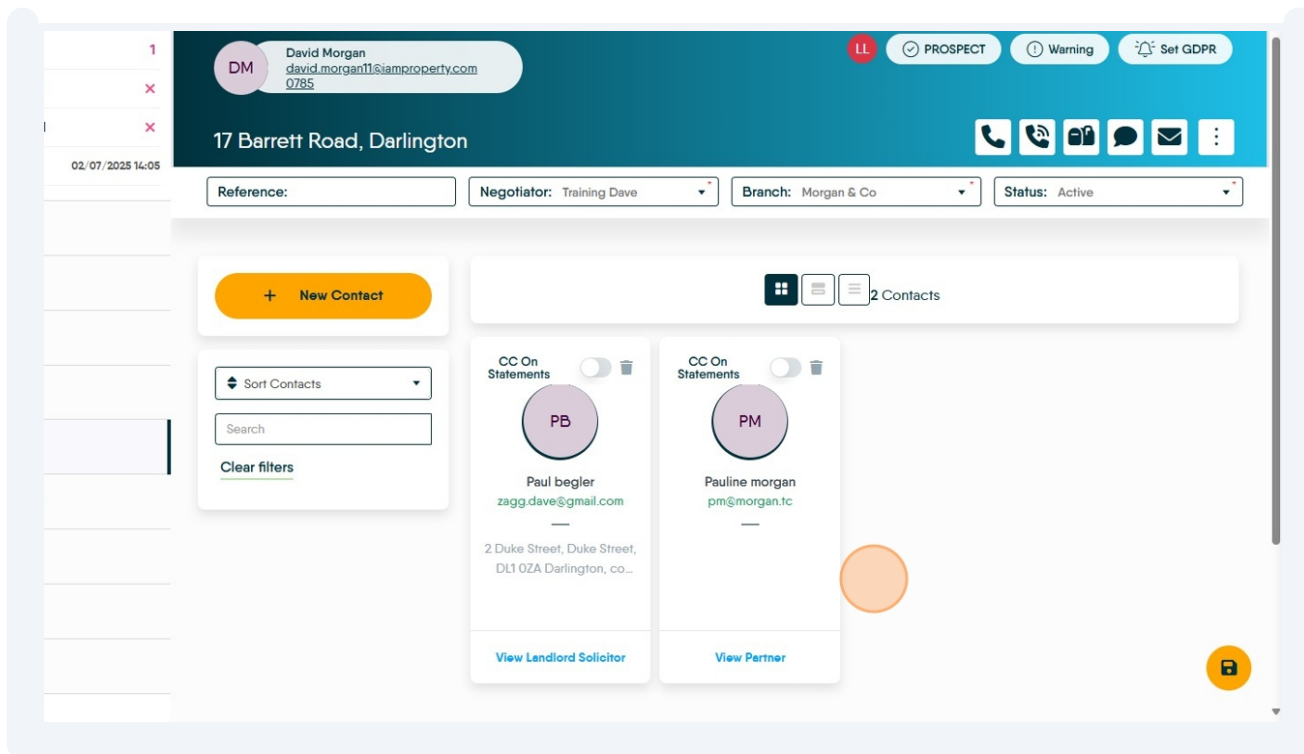
It is possible to add multiple email addresses into the "Email Address" field. in the format of 'email1;email2' however this is not ideal and is not CRM best practice.

The screenshot shows the CRM interface for a contact named David Morgan. The left sidebar contains a menu with options: Details, Checklist, Properties, Tenancies, Contacts, Documents, Journal, E-Sign, and Audit. The main content area is divided into two sections: Personal Information and Financial Information. In the Personal Information section, the Email Address field contains the text 'david.morgan11@iamprope'. In the Financial Information section, there are fields for Overseas, Tax Enabled, Registration No, CNR No, CNR Approval Date, Tax Rate, VAT Registration No, HMRC Due Date, Statement, Send Statement Via Email, Safe Deposits Type, and Safe Deposits Reg. No.

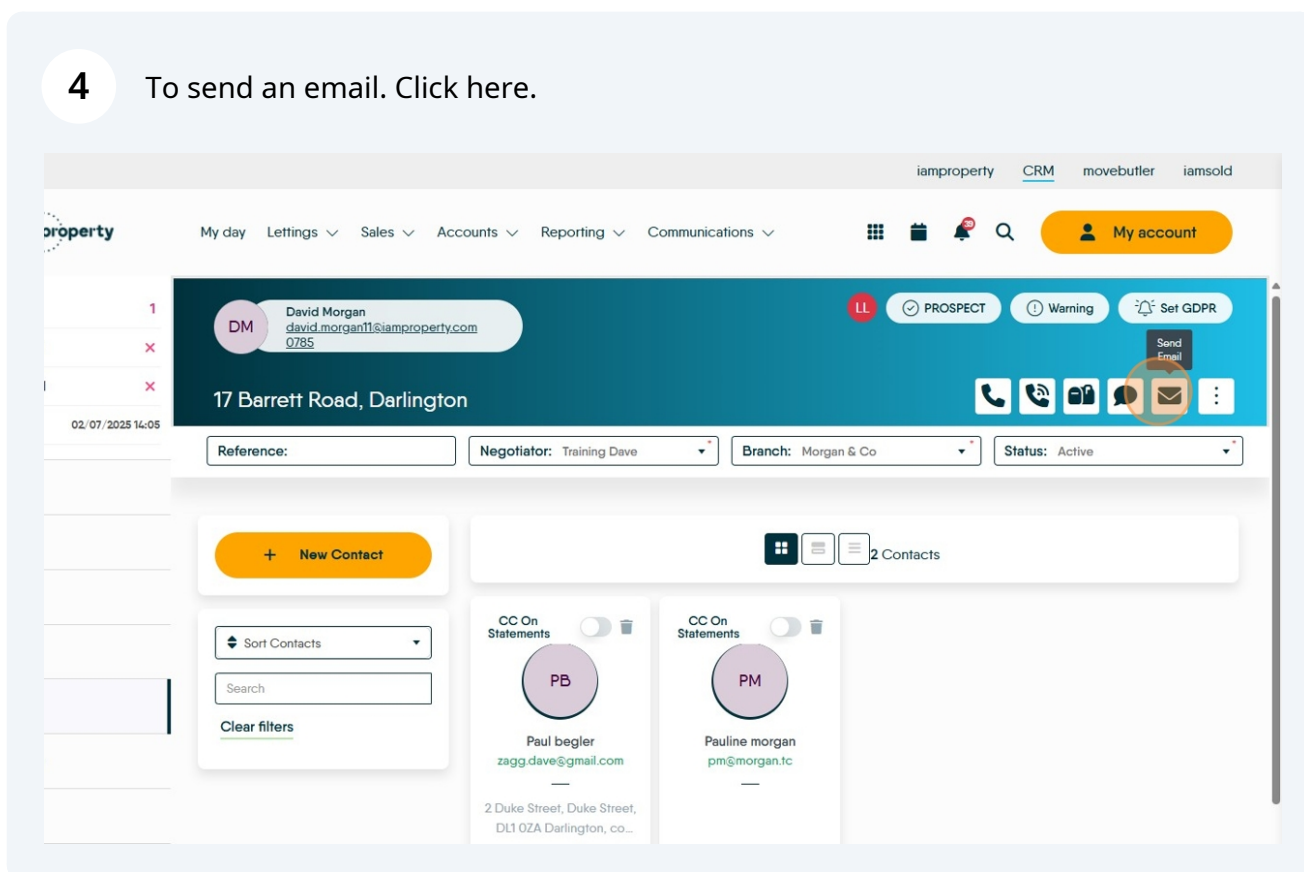
3

The best way to do this is to ensure your users are in contacts and Click "Contacts" to check this. Any linked Applicant or Mr/Mrs etc record should be added separately.

The screenshot shows the CRM interface for a contact named David Morgan. The left sidebar contains a menu with options: Details, Checklist, Properties, Tenancies, Contacts, Documents, Journal, E-Sign, and Audit. The 'Contacts' menu item is highlighted with an orange circle. The main content area is divided into two sections: Personal Information and Financial Information. In the Personal Information section, the Email Address field contains the text 'david.morgan11@iamprope'. In the Financial Information section, there are fields for Overseas, Tax Enabled, Registration No, CNR No, CNR Approval Date, Tax Rate, VAT Registration No, HMRC Due Date, Statement, Send Statement Via Email, Safe Deposits Type, and Safe Deposits Reg. No.

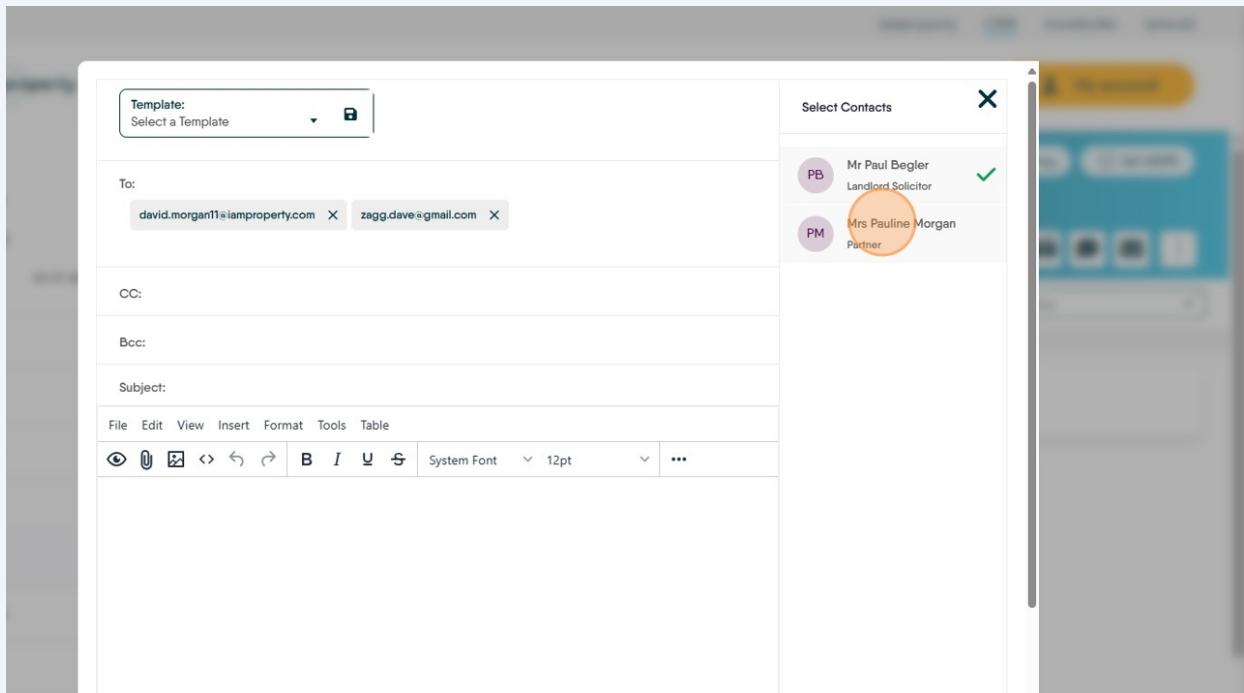
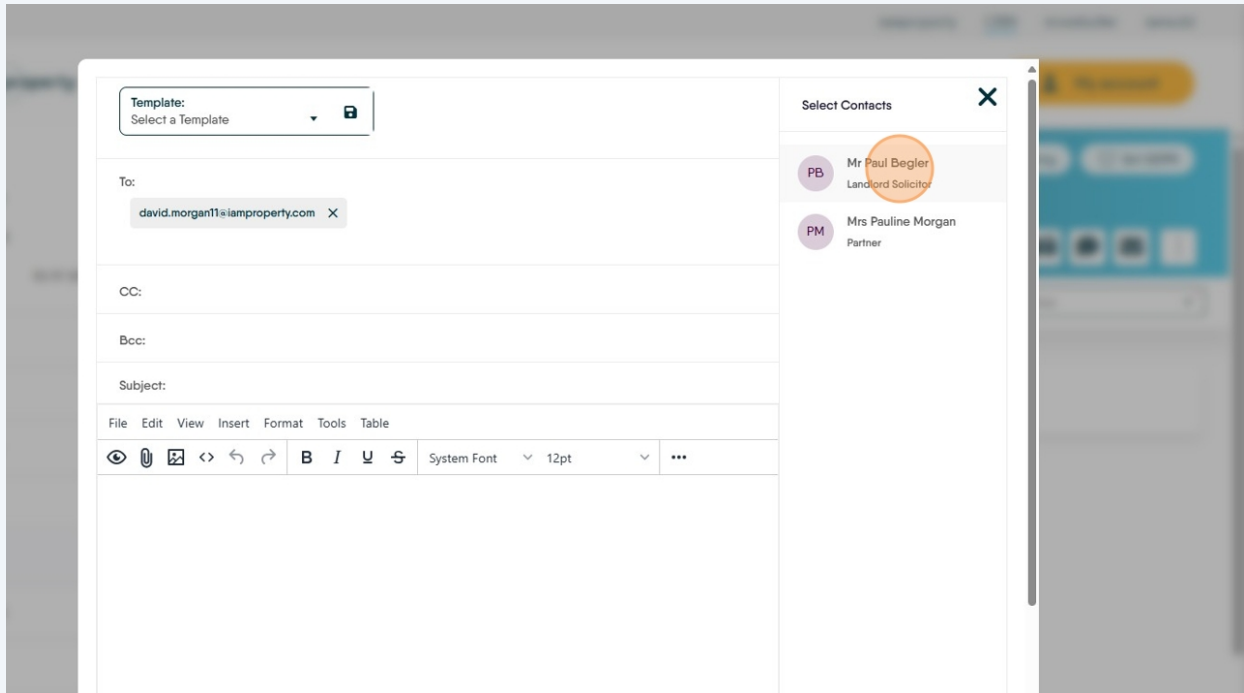


4 To send an email. Click here.

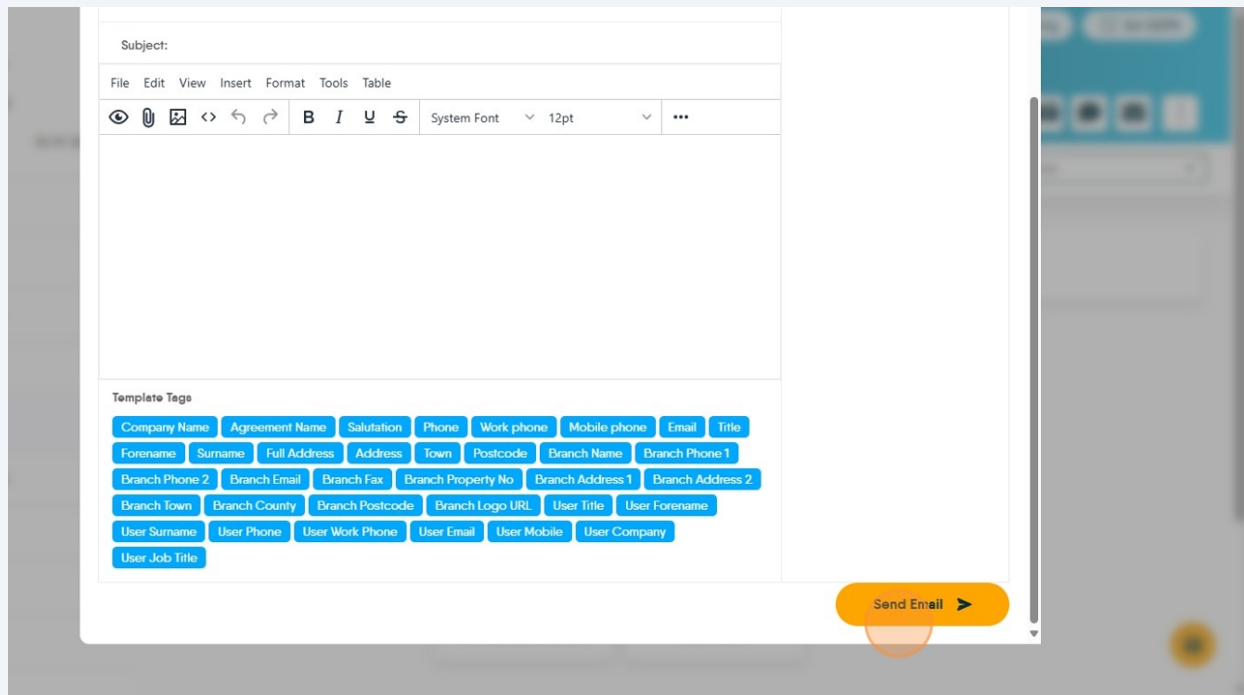


5 The additional records will show in the right of the screen. Select them as required, they will show with a green check mark when selected.

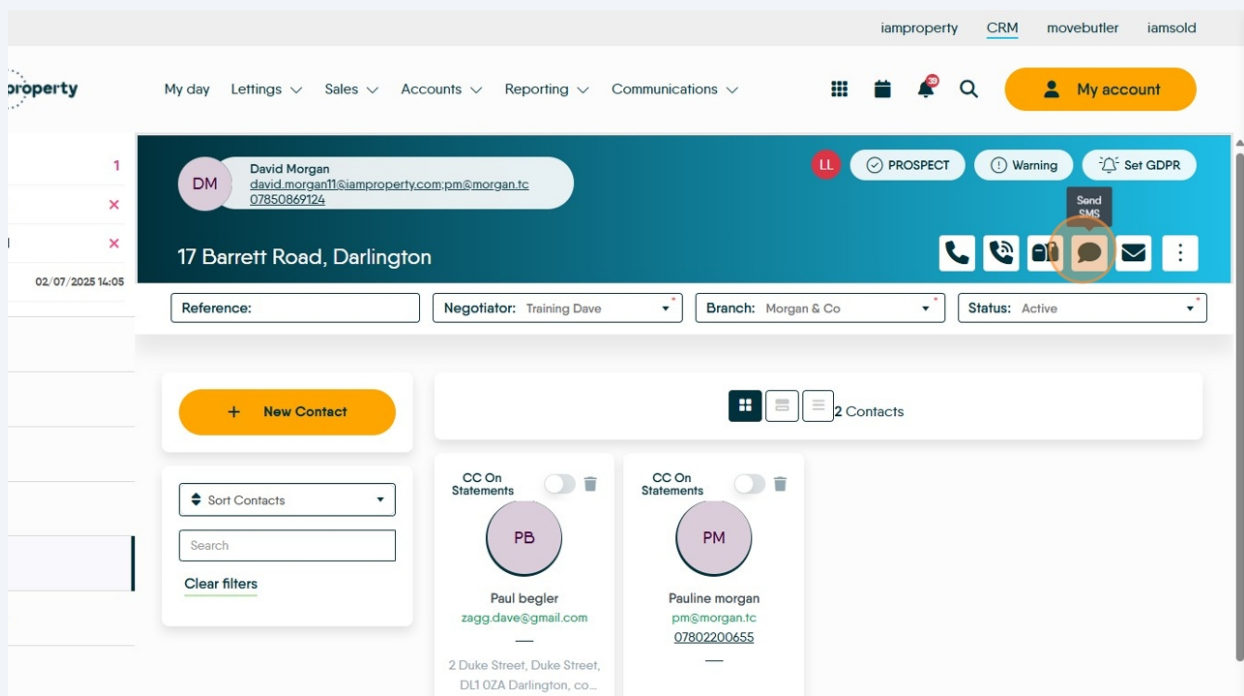
In some areas of CRM the contact details will only be shown when the 'paperclip' icon is clicked.



6 Once the contacts are selected click 'Send Email' to send the message.



7 Click here.



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SMS works in the same way, however if there is no mobile number attached to the user then they will not show in the SMS option

It is important that if a contact only has a mobile number, that number is added into the Phone Number and Mobile Number fields in their record.

From:

07850869124

Sender

Message Template

New Template Name...

Template Tags

Company Name Agreement Name Salutation

Phone Work phone Mobile phone Email

Title Forename Surname Full Address

Send Message

PB Mr Paul Begler

PM Mrs Pauline Morgan