

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 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 yellow 'My account' button. Below the navigation bar, there is a header with a profile picture of David Morgan, his name, email (david.morgan11@iamproperty.com), and phone number (0785). The header also includes status indicators: 'PROSPECT' (green), 'Warning' (yellow), and 'Set GDPR' (blue). The main content area shows a contact record for David Morgan, located at 17 Barrett Road, Darlington. The record includes fields for Reference (empty), Negotiator (Training Dave), Branch (Morgan & Co), and Status (Active). On the left, there is a sidebar with links: Details, Checklist, Properties, Tenancies, Contacts, Documents, Journal, and Sign. The 'Details' link is currently selected. The main content area is divided into two sections: 'Personal Information' and 'Financial Information'. The 'Personal Information' section contains fields for Title (Mr), Forename (David), Surname (Morgan), Company Name, Website, Phone Number, Work phone (0785), Mobile phone (0785), Email Address (david.morgan11@iamproperty.com), Salutation (X), Agreement Name (X), and Source (X). The 'Financial Information' section contains fields for Overseas (disabled), Tax Enabled (disabled), Exclude From Payments (disabled), 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.

Properties 1
Identity Confirmed X
Address Confirmed X
Last Contacted 02/07/2025 14:05

David Morgan
david.morgan11@iamproperty.com
0785

PROSPECT Warning

17 Barrett Road, Darlington

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

Details

Personal Information

Title: Mr	Forename: David
Surname: Morgan	Company Name
Website	Phone Number
Work phone	Mobile phone: 0785
Email Address: david.morgan11@iamproper	Salutation: X
Agreement Name: X	Source
Letting Reason	

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: 01/01/1900
Statement: No Statement	Send Statement Via Email
Safe Deposits Type: Registered	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.

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PROSPECT Warning

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Personal Information

Title: Mr	Forename: David
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Website	Phone Number
Work phone	Mobile phone: 0785
Email Address: david.morgan11@iamproper	Salutation: X
Agreement Name: X	Source
Letting Reason	

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: 01/01/1900
Statement: No Statement	Send Statement Via Email
Safe Deposits Type: Registered	Safe Deposits Reg. No.

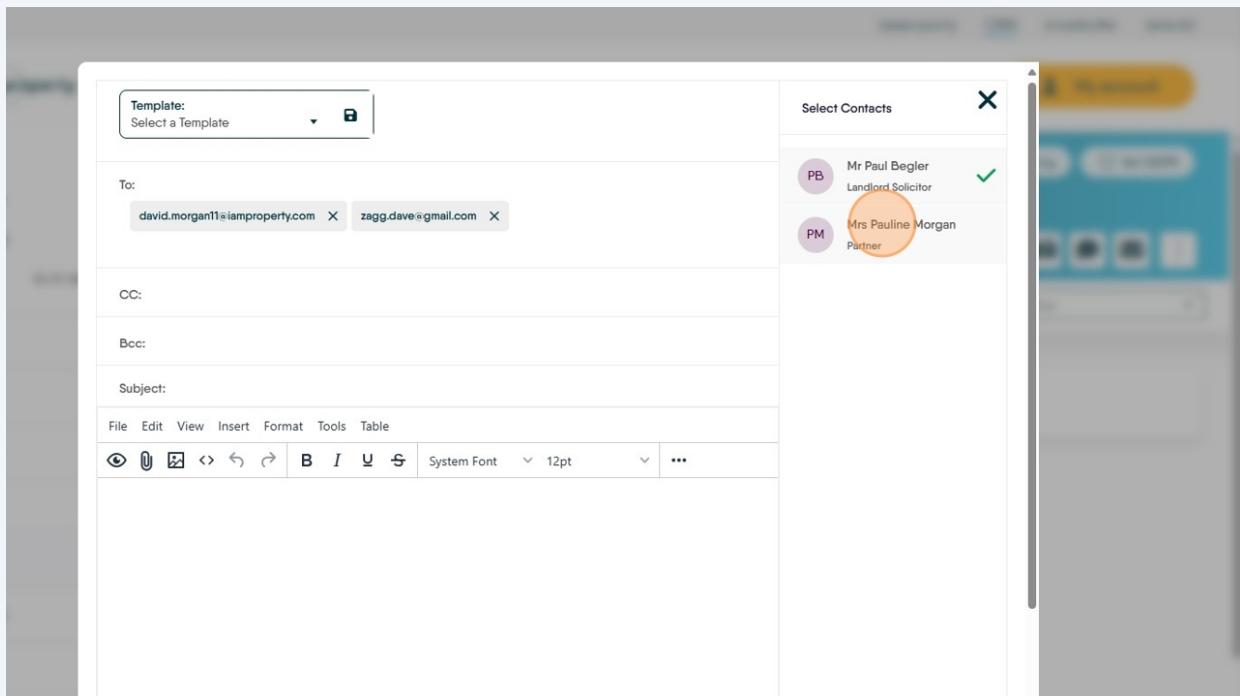
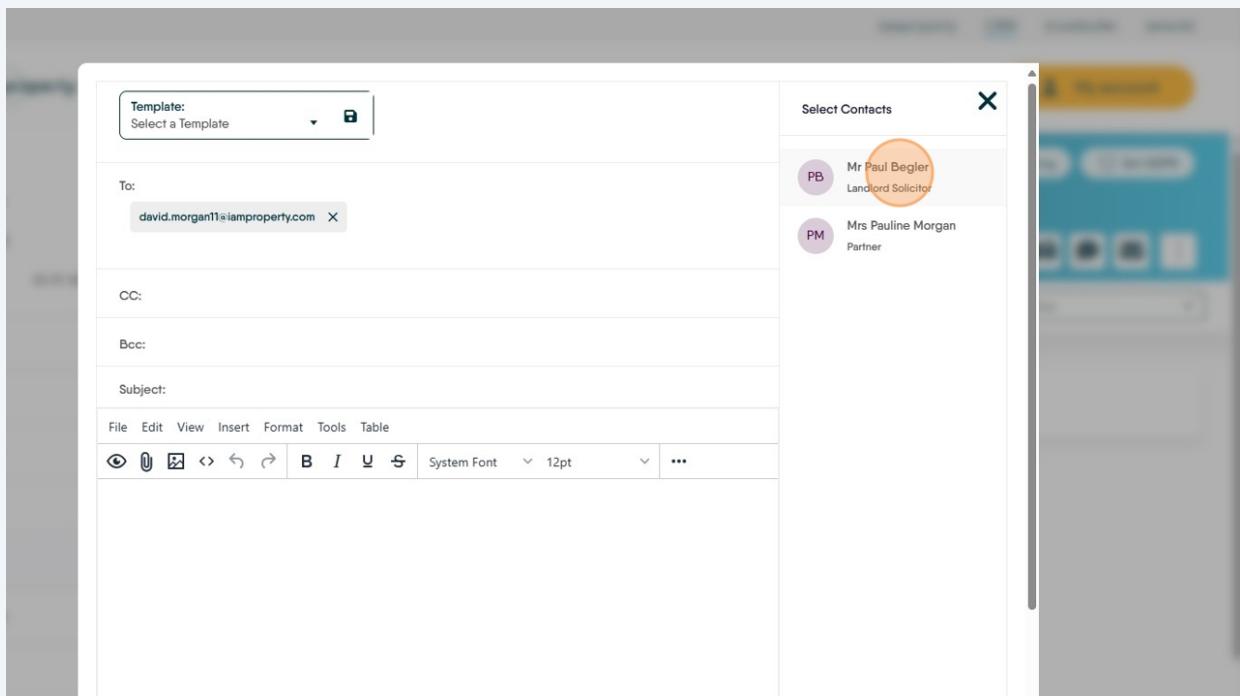
The screenshot shows the iamp property software interface. At the top, a header bar displays the property address: "17 Barrett Road, Darlington". Below the header are several status indicators: "PROSPECT" (red), "Warning" (yellow), and "Set GDPR" (green). The main content area shows a contact list for the property. On the left, there is a sidebar with a "New Contact" button and filters for "Sort Contacts" and "Search". The contact list on the right shows two entries: "PB" (Paul begler) and "PM" (Pauline morgan). Each contact has a "CC On Statements" toggle switch, which is currently off. Below each contact is their name and email address. At the bottom of the contact list are "View Landlord Solicitor" and "View Partner" buttons. A "Send Email" button is located in the bottom right corner of the contact list area. The status bar at the bottom indicates the date and time: "02/07/2025 14:05".

4 To send an email. Click here.

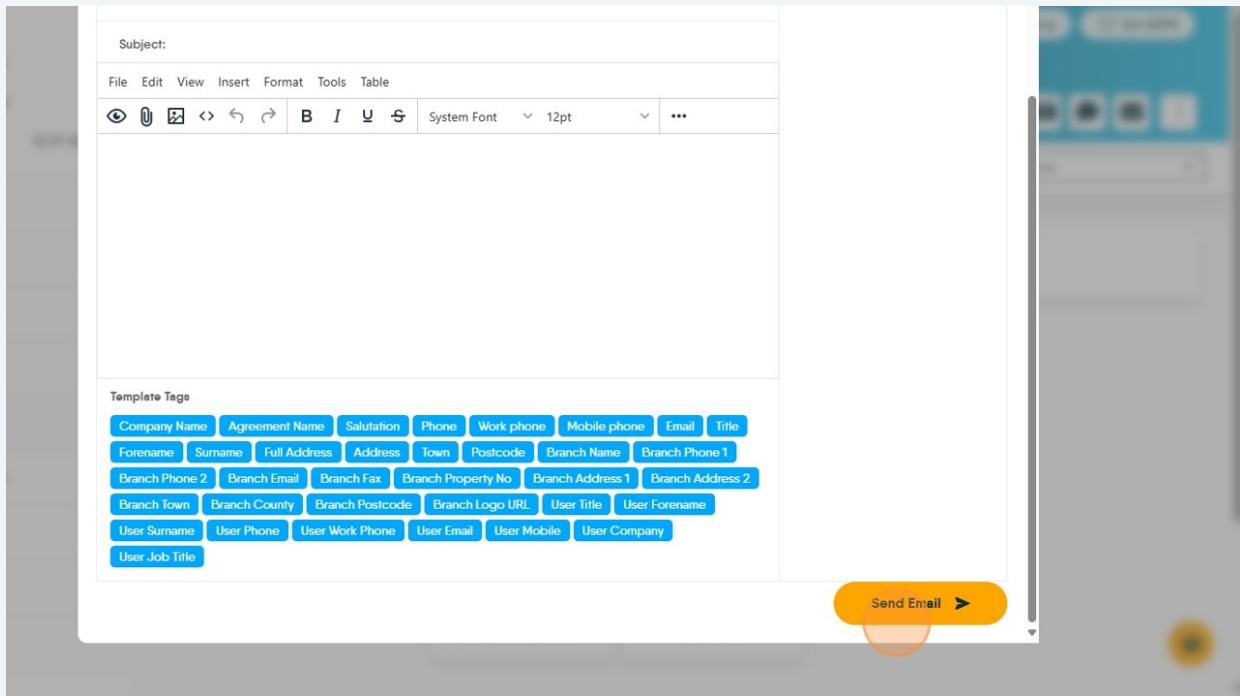
This screenshot is identical to the one above, showing the contact list for the property "17 Barrett Road, Darlington". The "Send Email" button in the bottom right corner of the contact list area is highlighted with a blue circle and a white outline. The rest of the interface, including the header, contact list, and status bar, is the same as the previous screenshot.

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.

A screenshot of the iamp property CRM interface. The top navigation bar includes links for iamproperty, CRM, movebutler, and iamsold. The main area shows a contact list with one entry for David Morgan. Below the contact list is a search bar and filter options for Reference, Negotiator, Branch, and Status. A large orange 'Send SMS' button is highlighted with a yellow circle. The bottom section shows a list of contacts with their names, emails, and phone numbers.

Name	Email	Phone
David Morgan	david.morgan11@iamproperty.com	07850869124
Pauline morgan	pm@morgan.tc	07802200655
Paul begler	zagg.dave@gmail.com	2 Duke Street, Duke Street, DL1 0ZA Darlington, co...

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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.

