

Uploading and Emailing a Sales/Lettings Brochure



This guide provides a straightforward process for effectively uploading and emailing sales or lettings brochures, ensuring that you can easily manage property documents. It breaks down each step clearly, making it accessible for users of all skill levels. By following these instructions, you can streamline your property marketing efforts and enhance communication with clients. This process is the same if you are sending sales or lettings brochures and can be used to send brochures to applicants



Tip! This guide follows a previous guide that shows how to create a brochure and save it to the property's documents folder.

1

Navigate to the property you are adding the brochure to.

Media

Rooms

Portals

Viewings

Offers

NOI

Enquiries

Key Control

Sub-Agent

Contacts

Documents

Journal

My day Lettings Sales Accounts Reporting Communications

Appraisal WARNING

7683 Pelaw Crescent, Chester le Street, DH2 2HX |

Guide Price £ 249,000 | 3 | 2

Lead vendor: Sales Vendor101 View Vendors

Reference Negotiator Training Dave Branch Morgan & Co Status

PROPERTY PICTURES Upload

Property Address Edit Address

Postcode DH2 2HX

Address 7683 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK

Price/Instructed Date Currency GBP

2 Click "Documents"

Media
Rooms
Portals
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NOI
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PROPERTY PICTURES Upload

Property Address Edit Address

Postcode DH2 2HX

Address 7683 Pelaw Crescent, Chester le Street, County Durham, DH2

Price/Instructed Date Currency

Prefix Price (GBP) £

3 Click "Add Document"

Media
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+ Add Document

Sort Documents

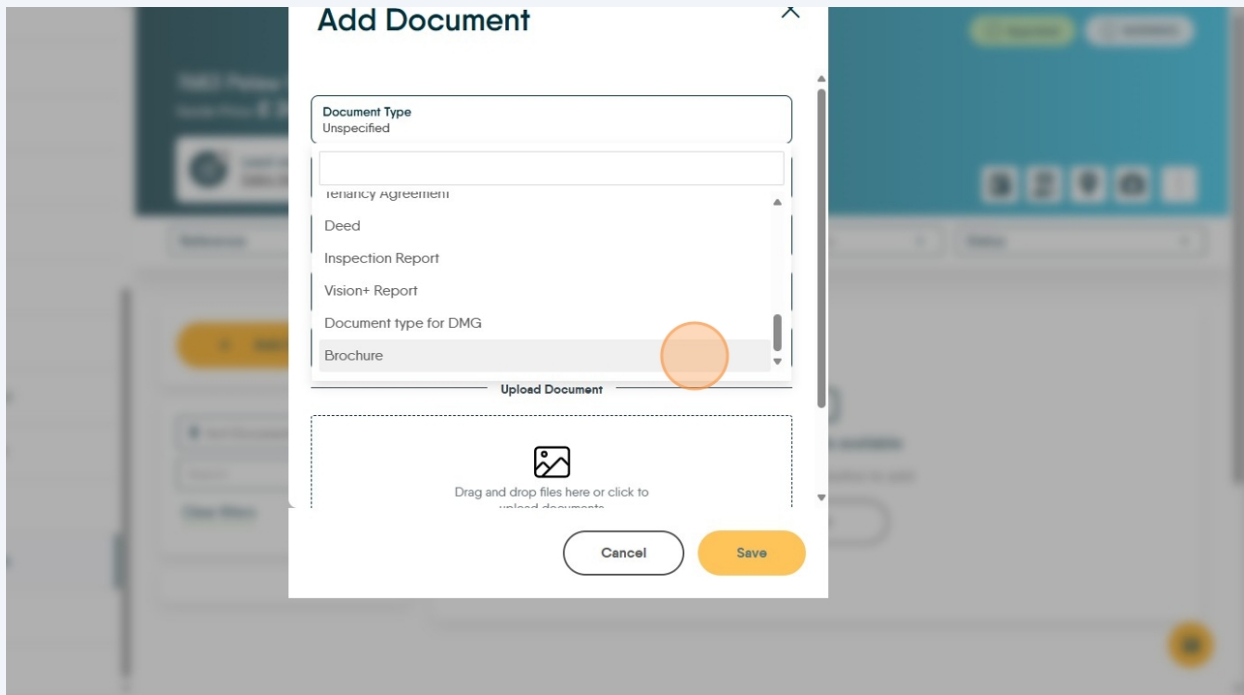
Search

Clear filters

No documents available
Please click the button to add

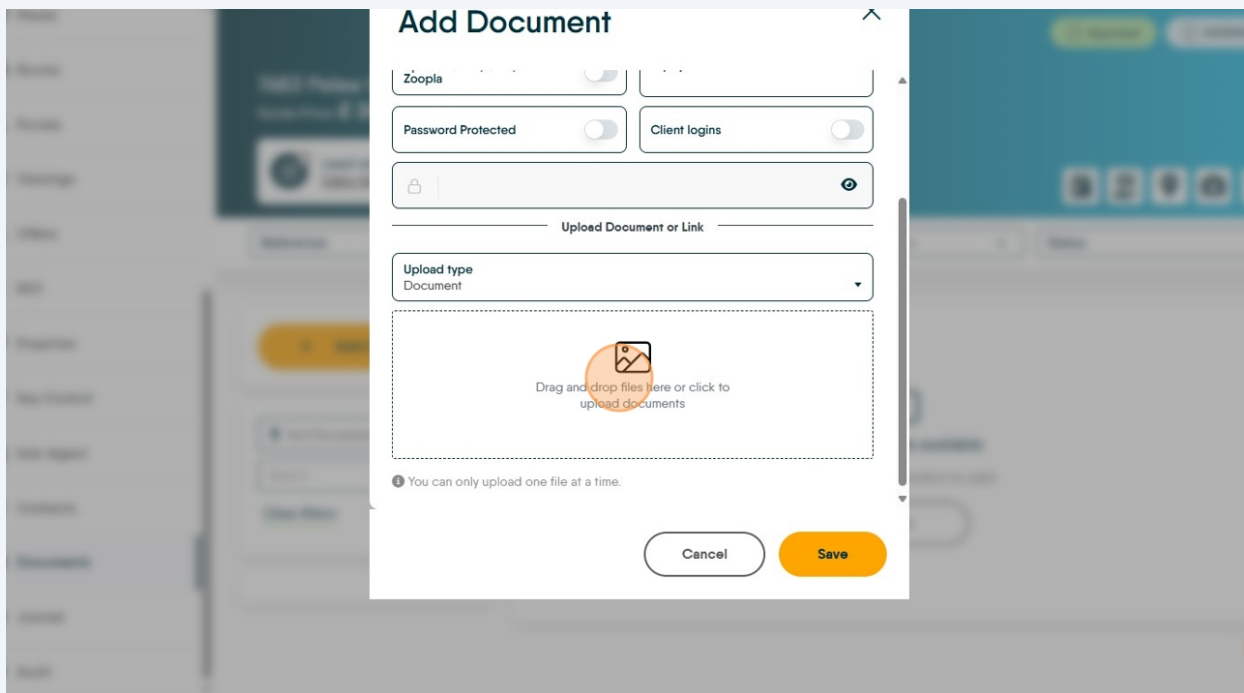
Start

- 4 Click 'Document Type' and from the list "Brochure"



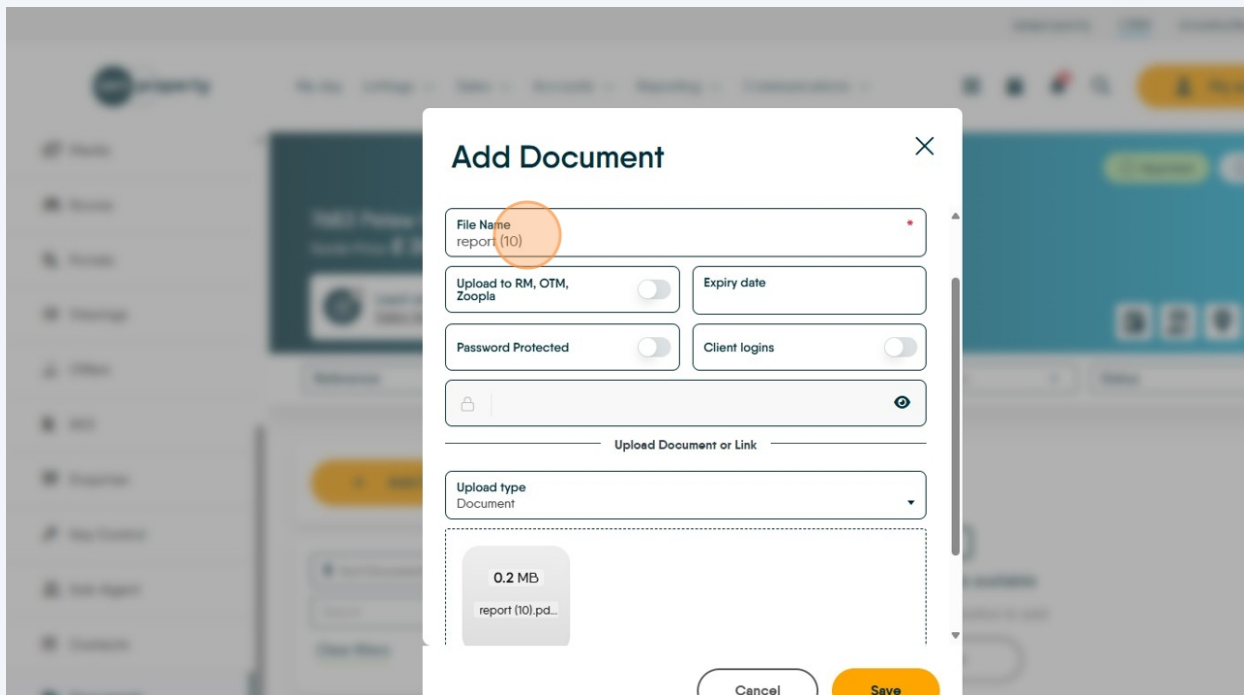
The screenshot shows a modal titled "Add Document". At the top, there is a "Document Type" dropdown menu with "Unspecified" selected. Below it, a list of document types is displayed: "tenancy Agreement", "Deed", "Inspection Report", "Vision+ Report", "Document type for DMG", and "Brochure". The "Brochure" option is highlighted with an orange circle. Below the list is a dashed box with a file icon and the text "Drag and drop files here or click to upload documents". At the bottom are "Cancel" and "Save" buttons.

- 5 "Drag and drop files here or click to upload documents" from the screen that shows, navigate to where your file is stored, if you have created and saved a guide it will (unless previously removed) be in the Downloads folder of your PC. Select the file and click to import into CRM.



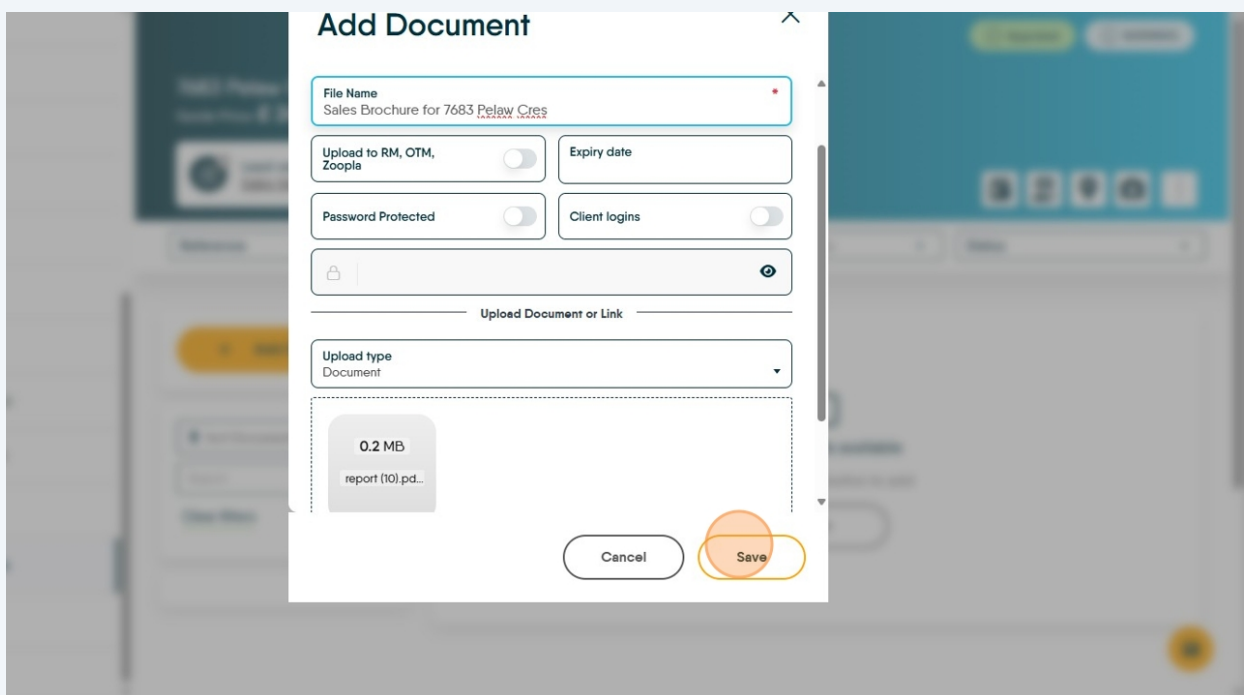
The screenshot shows the "Add Document" modal with the "Upload Document or Link" section. The "Upload type" dropdown is set to "Document". Below it is a dashed box with a file icon and the text "Drag and drop files here or click to upload documents". An orange circle highlights the file icon. Below the dashed box is a note: "You can only upload one file at a time." At the bottom are "Cancel" and "Save" buttons.

- 6 Click the "File Name" field.



The screenshot shows a modal window titled "Add Document" with a close button (X) in the top right corner. The "File Name" field contains the text "report (10)" and is highlighted with an orange circle. Below this field are four toggle switches: "Upload to RM, OTM, Zoopla" (disabled), "Password Protected" (disabled), "Expiry date" (disabled), and "Client logins" (disabled). There is also a "Link" field with a lock icon and a "Share" icon. Below these is a section labeled "Upload Document or Link" with a dropdown menu for "Upload type" set to "Document". A file preview shows "0.2 MB report (10).pd...". At the bottom are "Cancel" and "Save" buttons.

- 7 Type the name you want for the document, Click "Save"



The screenshot shows the same "Add Document" modal window. The "File Name" field now contains the text "Sales Brochure for 7683 Pelaw Cres" and is highlighted with a blue border. The "Save" button at the bottom right is highlighted with an orange circle. The other elements of the form remain the same.

To Send the Document to the Vendor

8 Click onto the Vendors name

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Lead vendor: Sales Vendor101 View Vendors

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+ Add Document

Sort Documents

Search

Clear filters

1 Documents

Sales Brochure For 7683 Pelaw Cres
Brochure - 165.7 KB

04/08/2025

9 From this email screen, click here.

Select a template

To: zagg.dave@gmail.com X

CC:

Bcc:

Subject: {Property Address}

File Edit View Insert Format Tools Table

Undo Redo Bold Italic Underline Link System Font 12pt

Template Tags

Property ID Property Address Property Price Offer Price Vendor ID Company Name Salutation

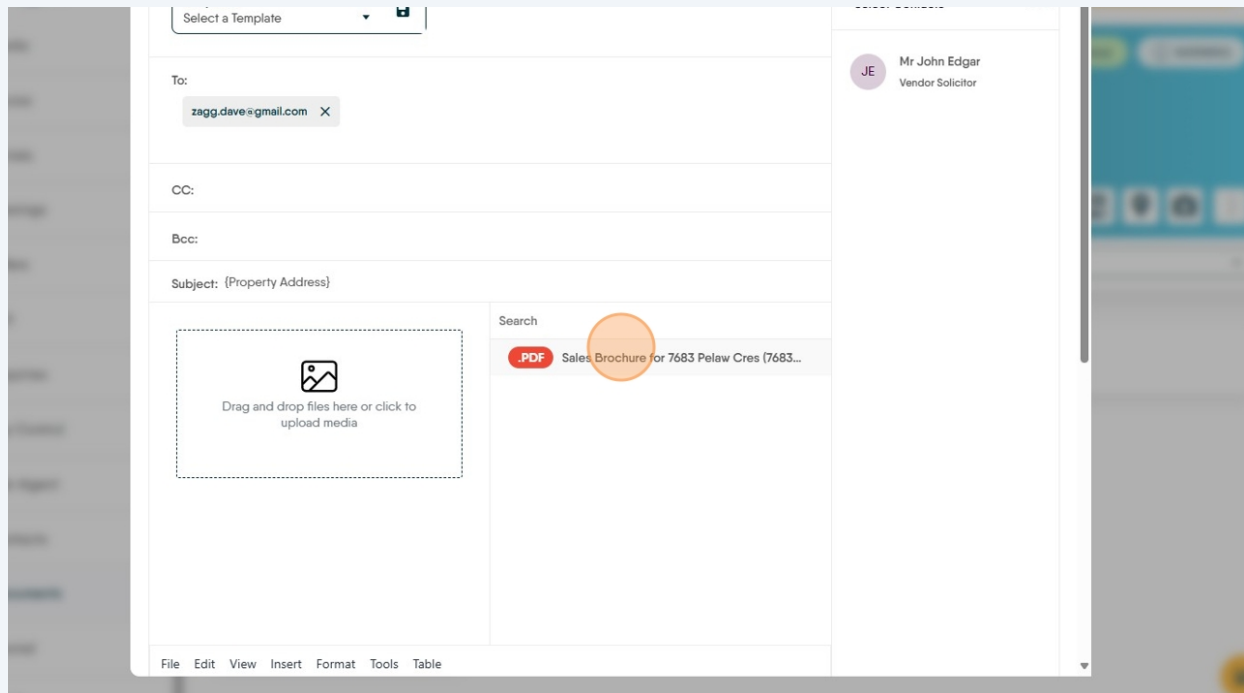
Mr John Edgar
Vendor Solicitor

10

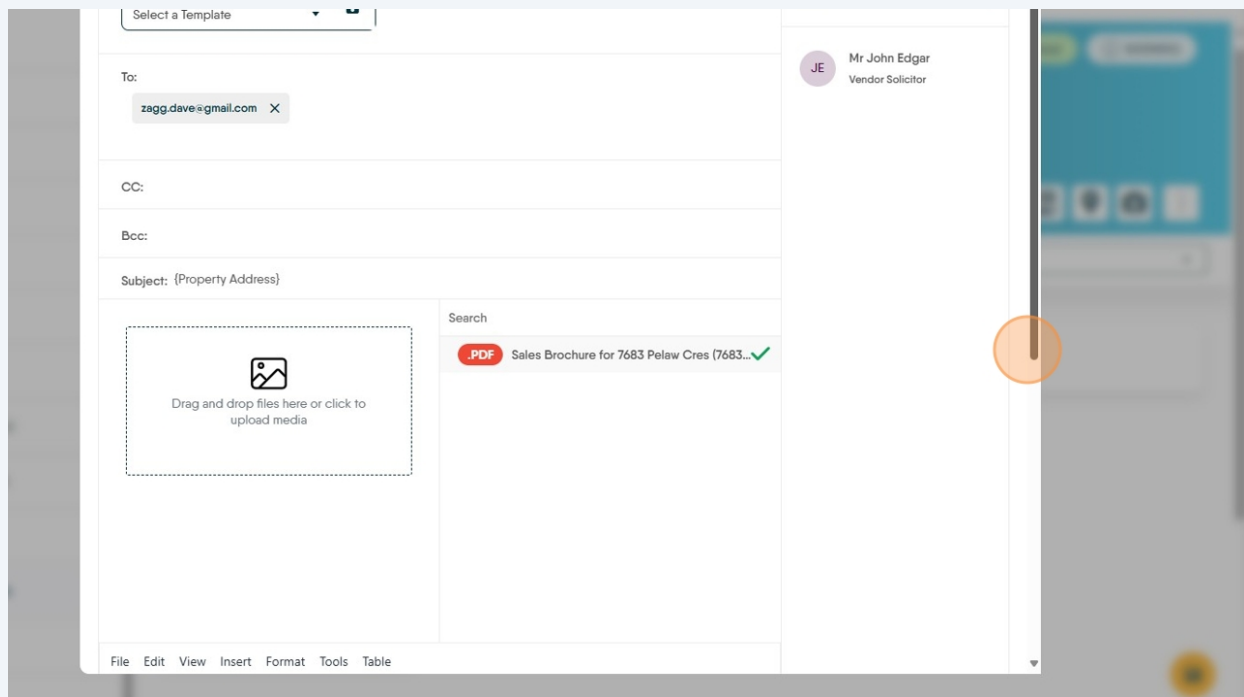
The documents uploaded to the property record will show on the right side of the screen. Click to select the document you want to email.

The email address for the Vendor/Landlord you are sending the document to will show in the screen.

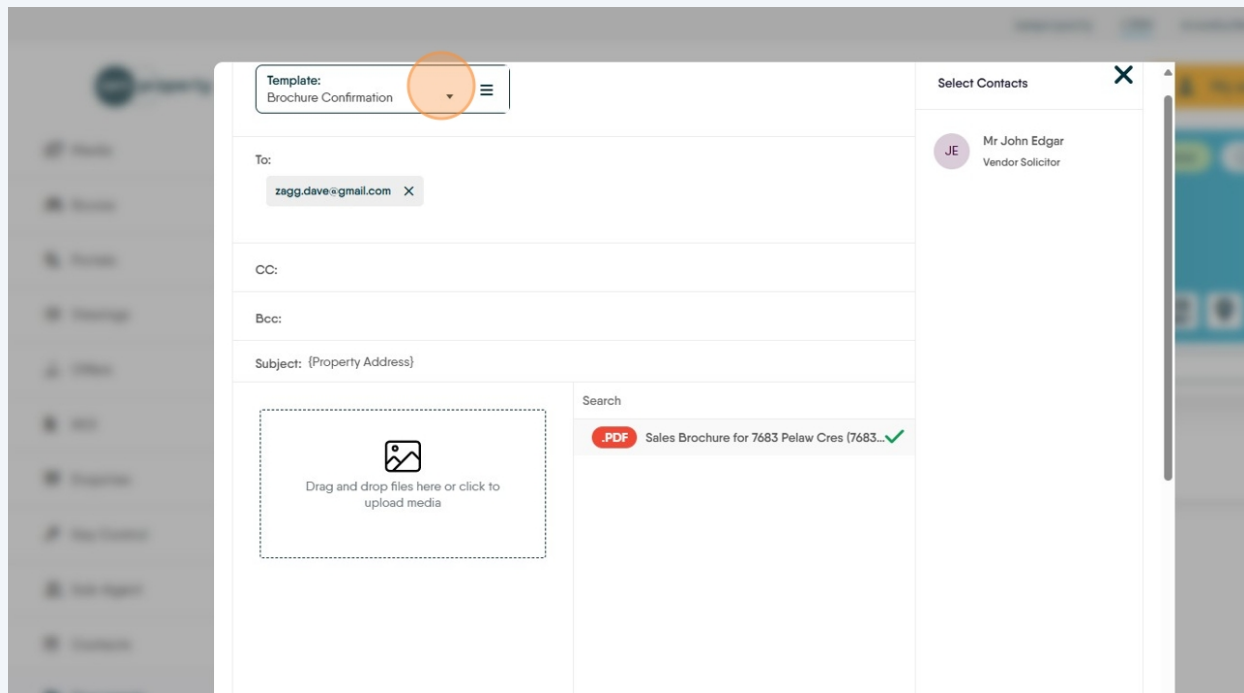
If you want to send the document to another recipient e.g. a prospective Purchaser or Tenant then add their email to the 'To' field and remove the original email.

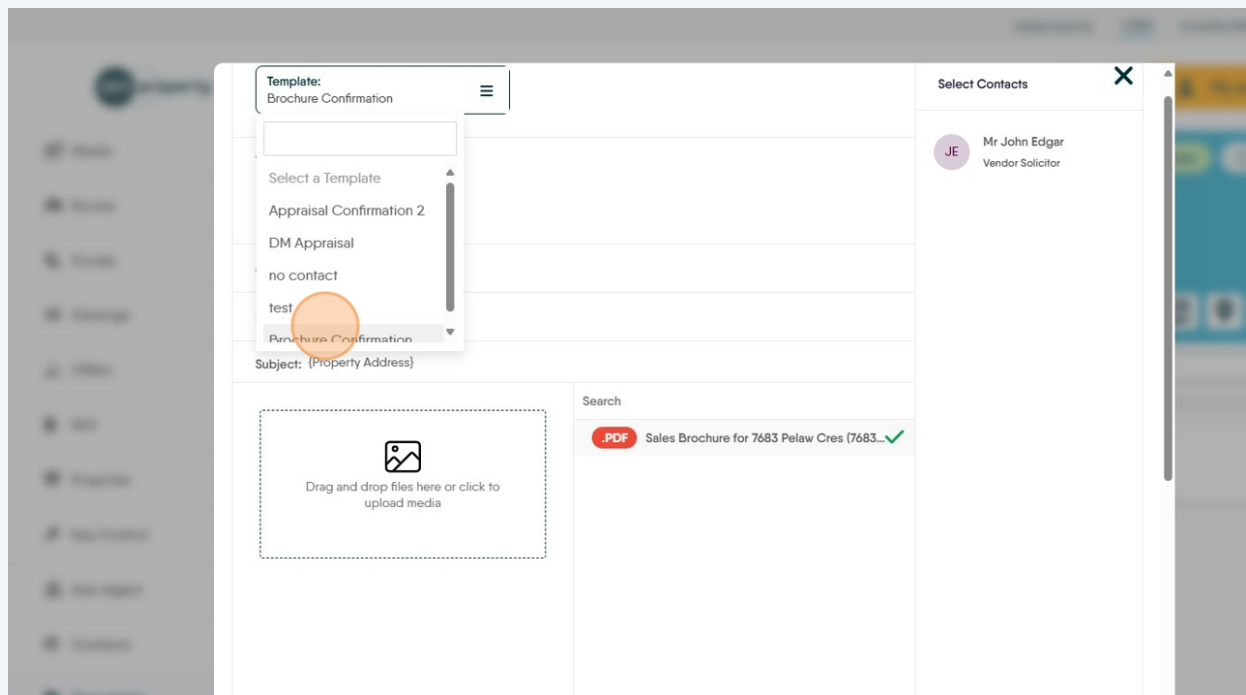


11 A green tick will show the document is selected.

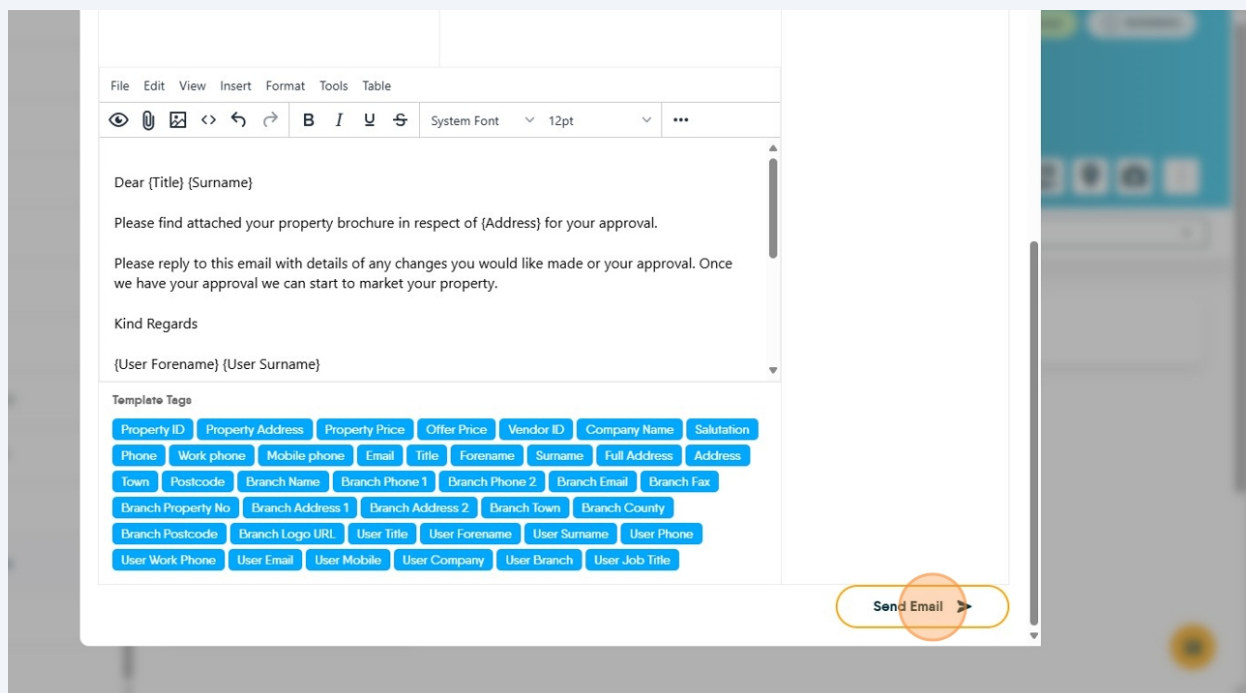


12 Either type your email message in the message screen or (if you have one created) select a template from the menu.
In this case we do so, click "Brochure Confirmation"





13 Click "Send Email"



14 The email will be sent to the recipient that is set in the to box and the email recorded in the Property Journal. If you want to link the Journal record to the applicant it can be done in the journal record.