

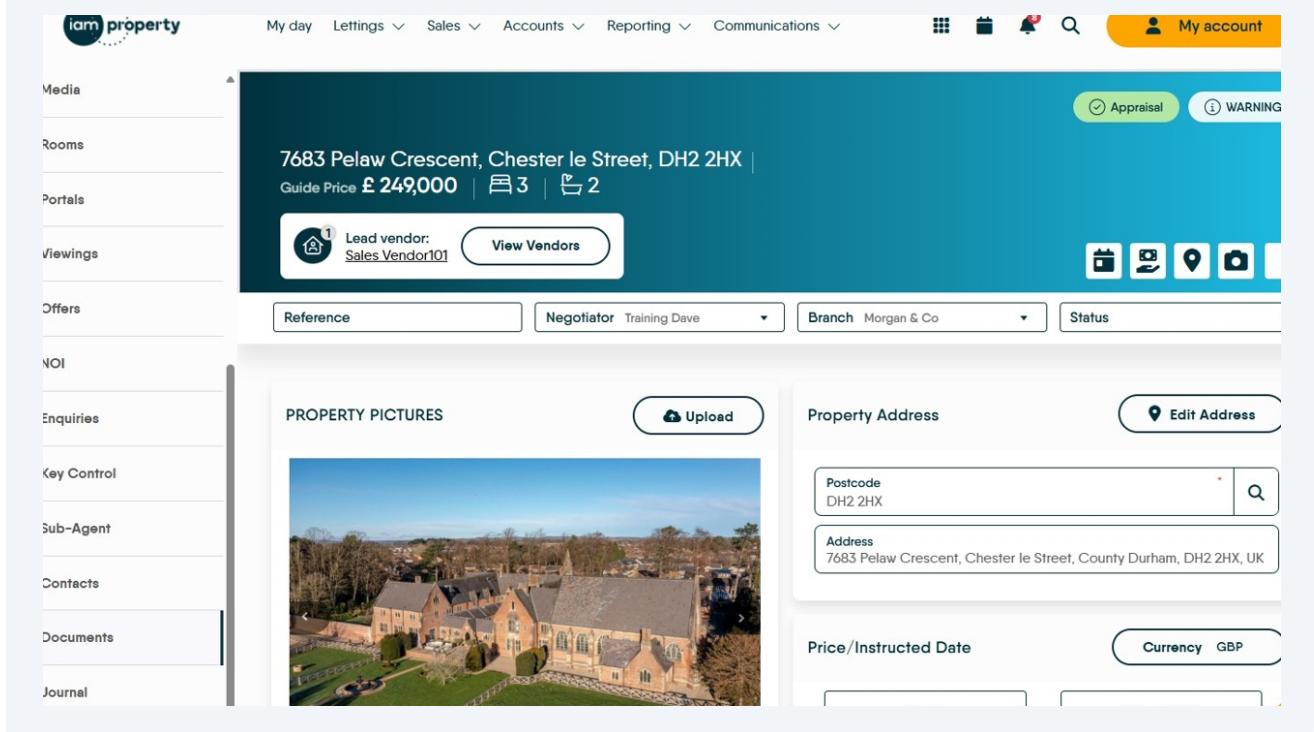
Uploading and Emailing a Sales/Lettings Brochure

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

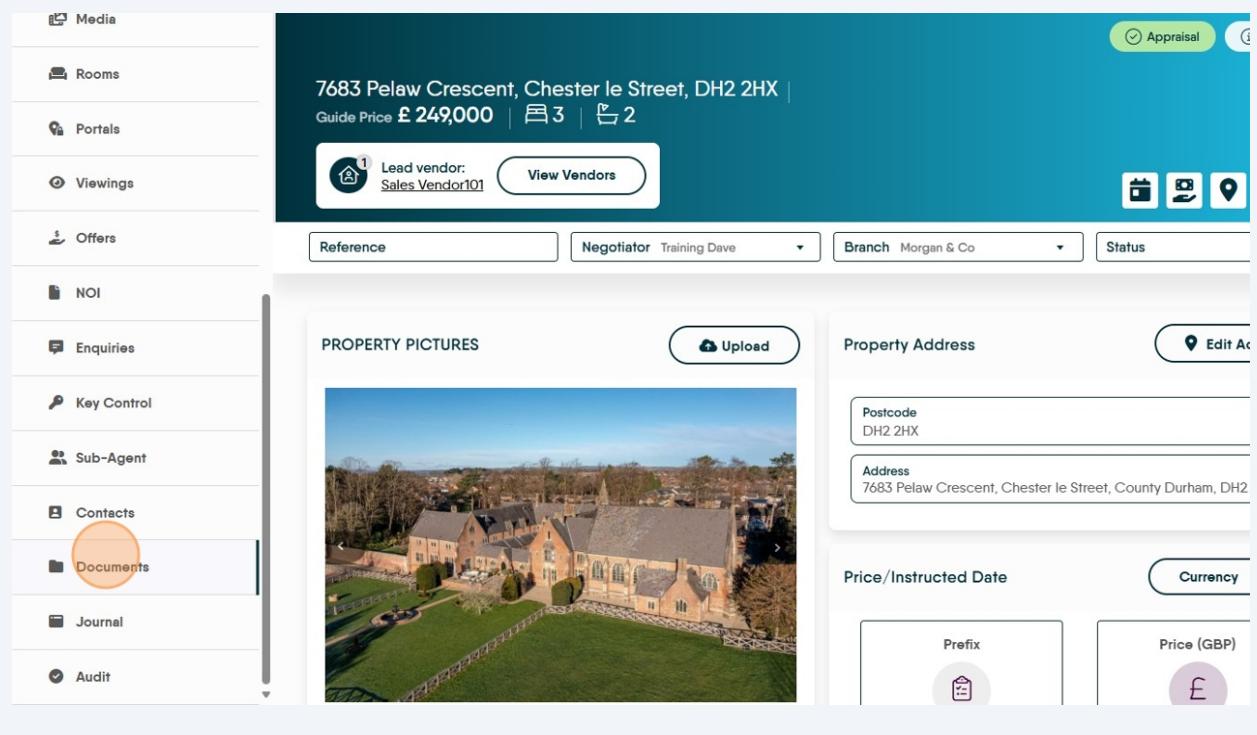


Tip! This guide follows a previous guide that shows how to create a brochure and save it to the property's documents folder.

- 1 Navigate to the property you are adding the brochure to.

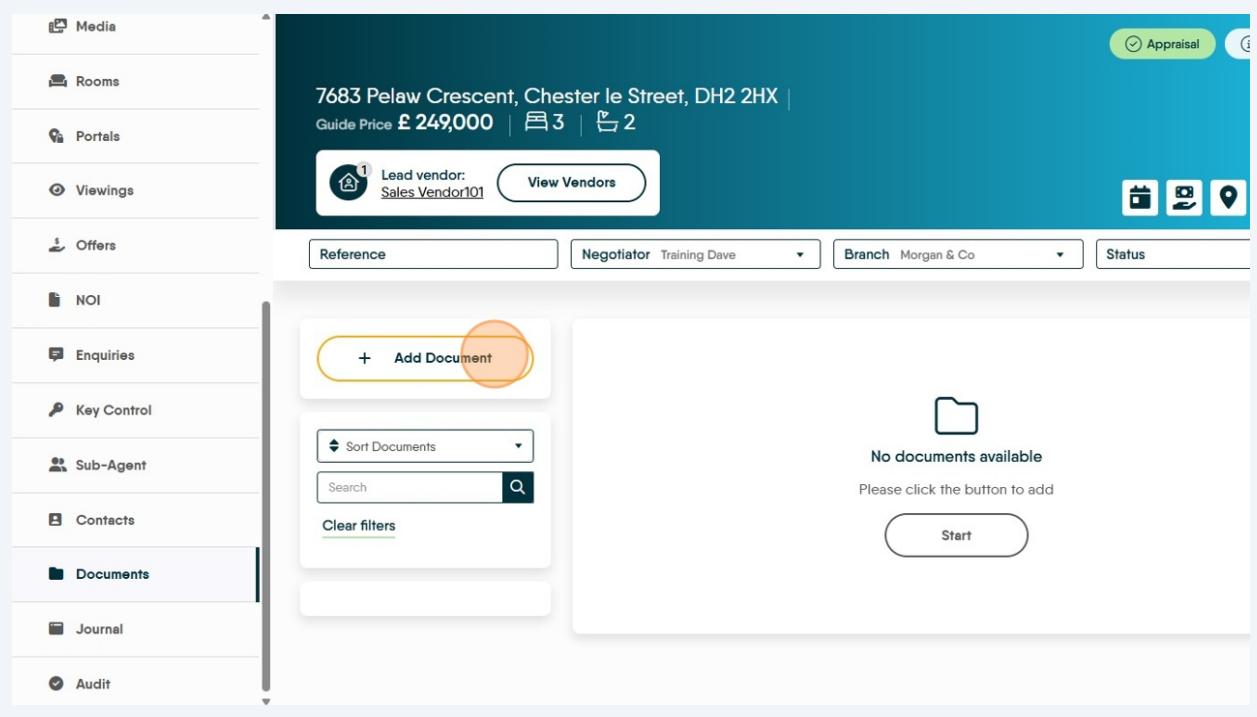
A screenshot of the iam property software interface. The top navigation bar includes links for "My day", "Lettings", "Sales", "Accounts", "Reporting", "Communications", and "My account". On the left, a sidebar lists "Media", "Rooms", "Portals", "Viewings", "Offers", "NOI", "Enquiries", "Key Control", "Sub-Agent", "Contacts", "Documents", and "Journal". The main content area displays a property listing for "7683 Pelaw Crescent, Chester le Street, DH2 2HX | Guide Price £ 249,000 | 3 | 2". It includes a "Lead vendor: Sales Vendor101" section with a "View Vendors" button. Below this are fields for "Reference", "Negotiator", "Branch", and "Status". The "PROPERTY PICTURES" section shows an aerial view of a large, multi-story house. To the right, there are fields for "Property Address" (Postcode: DH2 2HX, Address: 7683 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK), "Price/Instructed Date" (Price: £249,000, Currency: GBP), and "Edit Address" buttons. Navigation icons for back, forward, and search are at the bottom right.

2 Click "Documents"



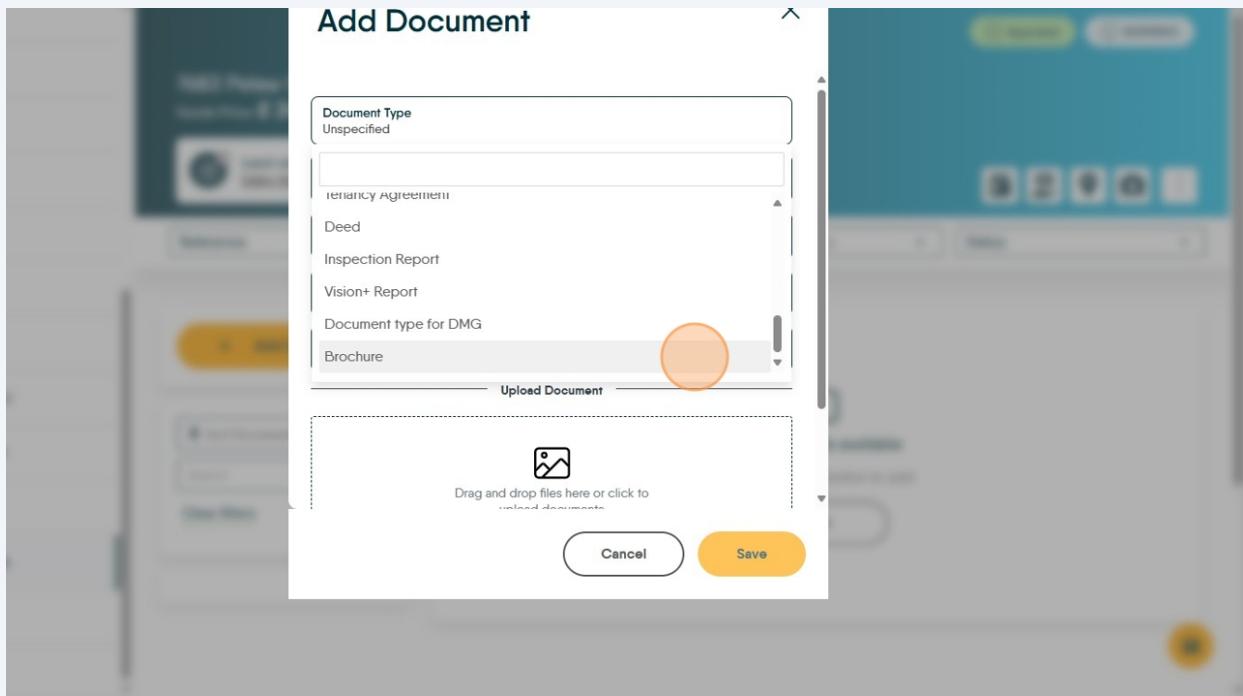
A screenshot of a property listing interface. On the left, a sidebar menu lists various options: Media, Rooms, Portals, Viewings, Offers, NOI, Enquiries, Key Control, Sub-Agent, Contacts, Documents (which is highlighted with an orange circle), Journal, and Audit. The main content area shows a property listing for 7683 Pelaw Crescent, Chester le Street, DH2 2HX, with a guide price of £249,000. It includes a lead vendor (Sales Vendor101), a 'View Vendors' button, and filters for Reference, Negotiator, Branch, and Status. Below the listing is a section for 'PROPERTY PICTURES' with an 'Upload' button and a large image of a large, red-brick house. To the right are sections for 'Property Address' (Postcode: DH2 2HX, Address: 7683 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX), 'Price/Instructed Date' (Prefix: £, Price (GBP): £), and 'Currency'.

3 Click "Add Document"

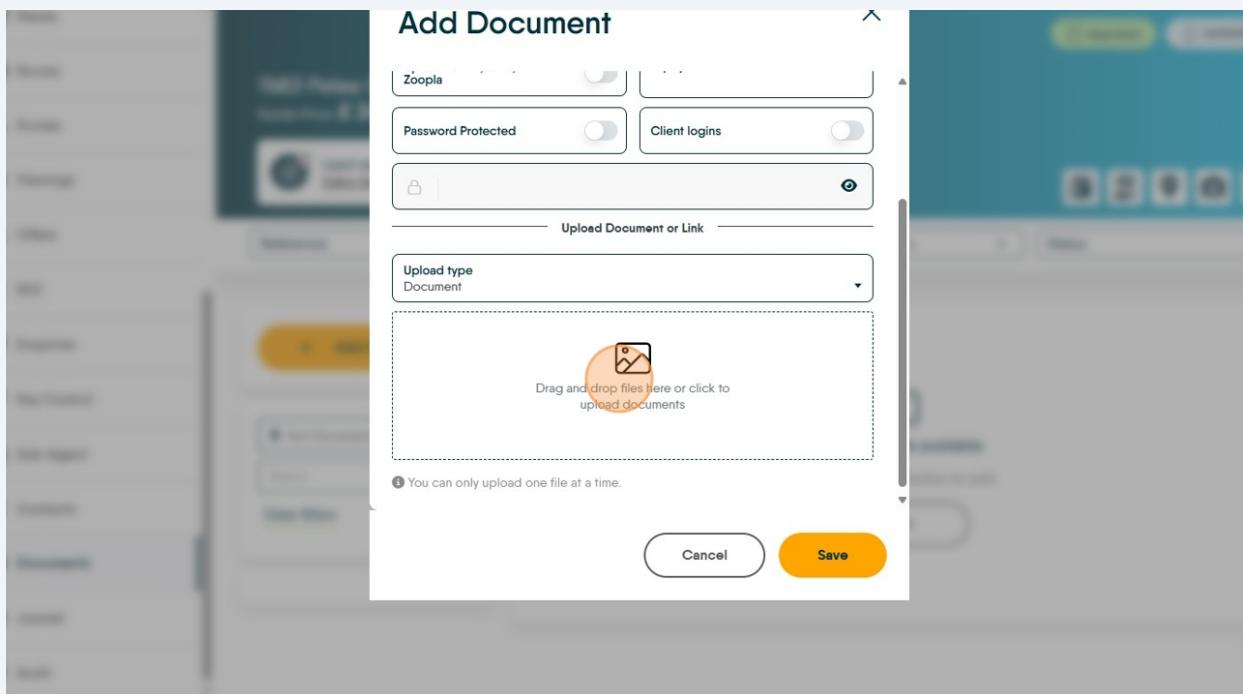


A screenshot of the same property listing interface as above, but with a different focus. The 'Documents' menu item in the sidebar is highlighted with an orange circle. In the main content area, the 'Documents' section is expanded, showing a large orange button with a plus sign and the text 'Add Document' (which is also highlighted with an orange circle). Below this button are filters for 'Sort Documents' (dropdown), 'Search' (input field with a magnifying glass icon), and 'Clear filters' (link). To the right, there is a message: 'No documents available' with a folder icon, followed by the text 'Please click the button to add' and a 'Start' button.

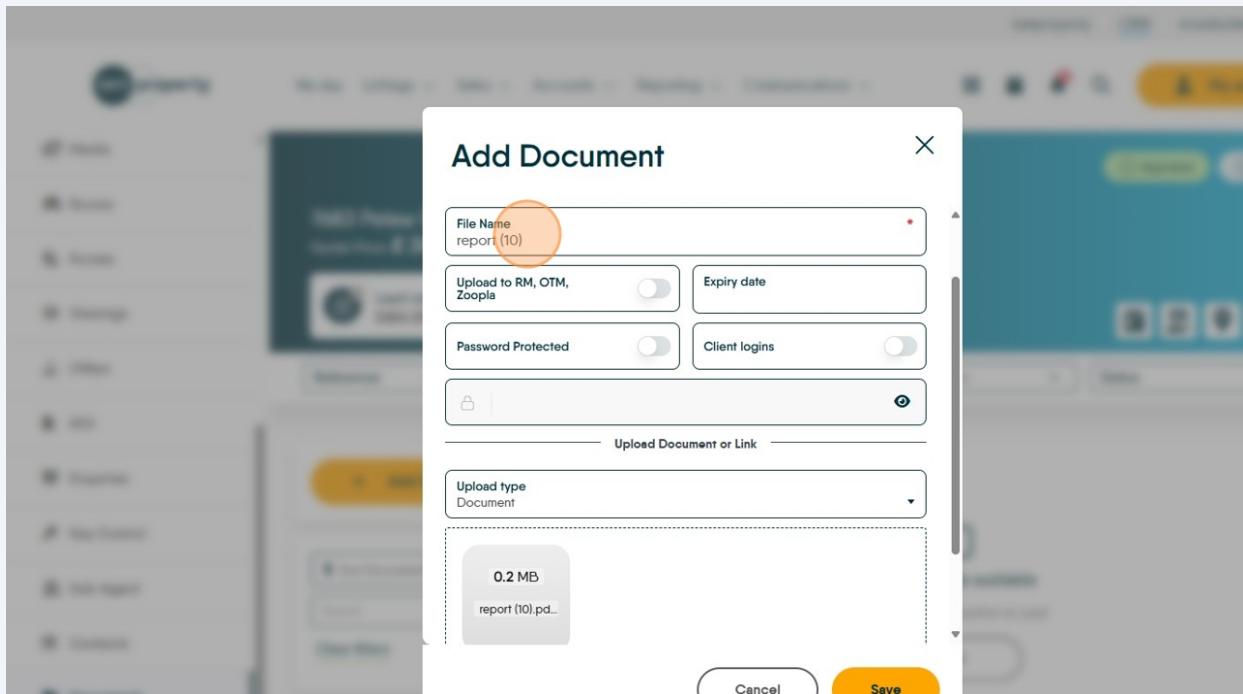
4 Click 'Document Type' and from the list "Brochure"



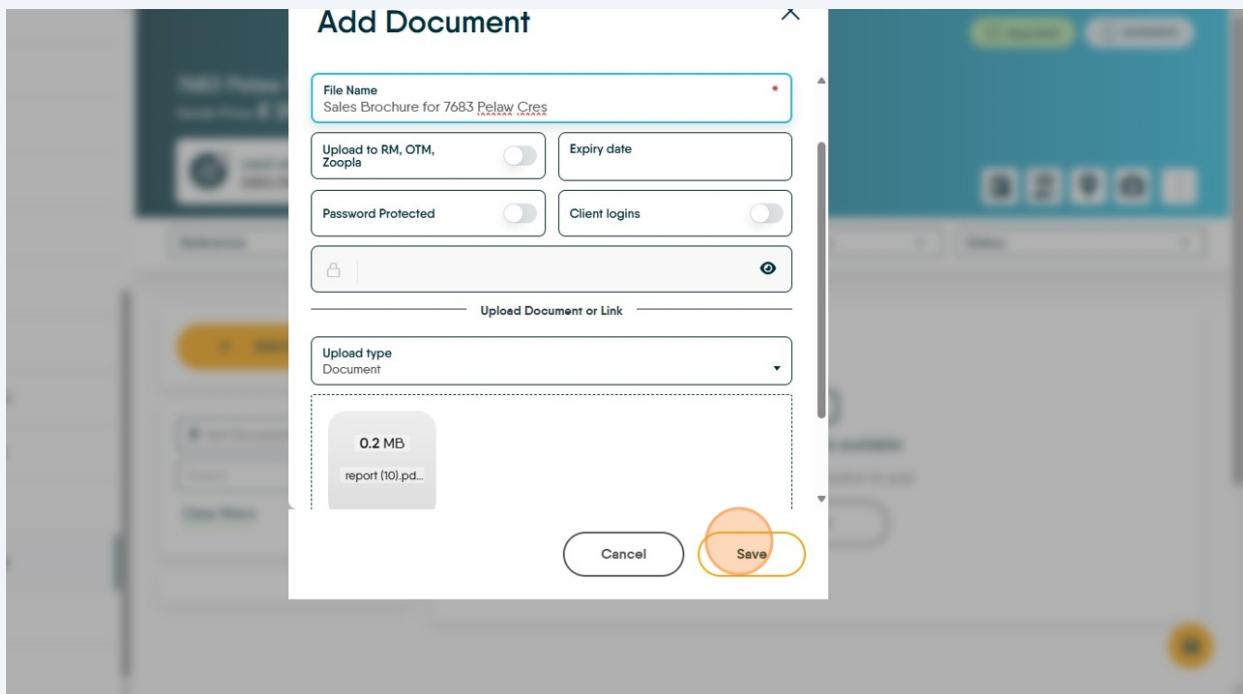
5 "Drag and drop files here or click to upload documents" from the screen that shows, navigate to where your file is stored, if you have created and saved a guide it will (unless previously removed) be in the Downloads folder of your PC. Select the file and click to import into CRM.



6 Click the "File Name" field.

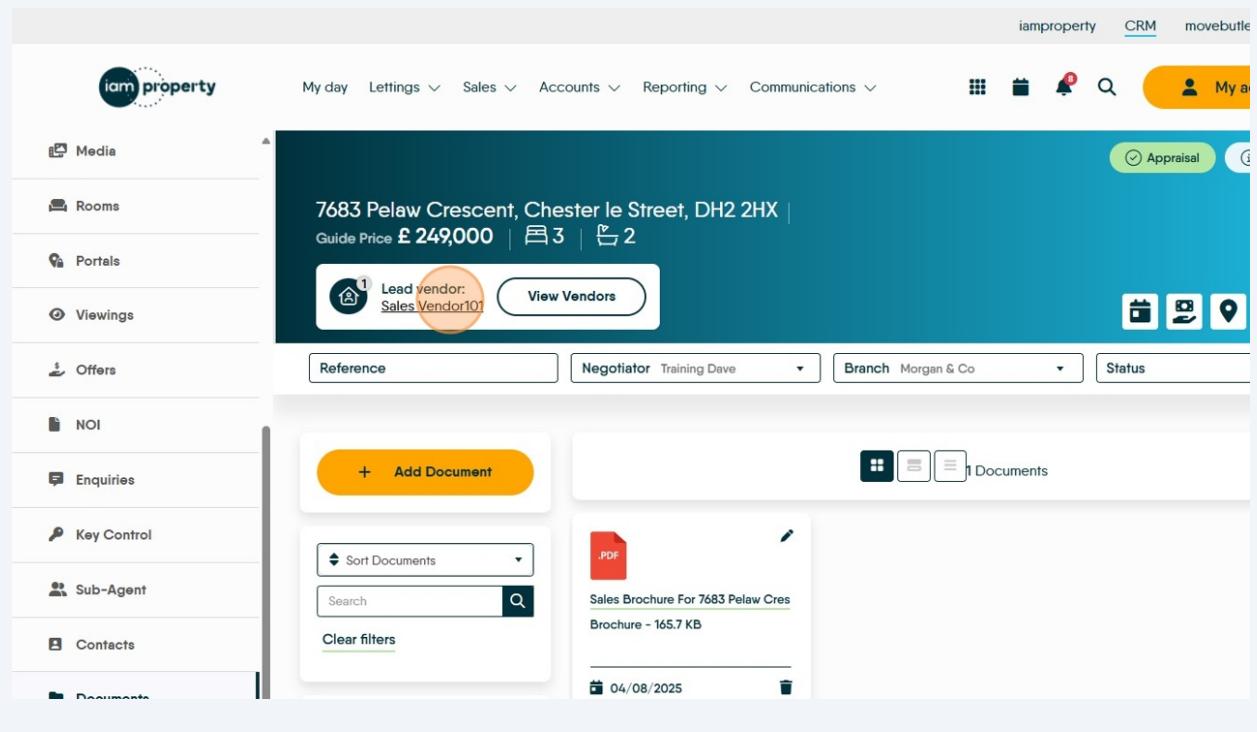


7 Type the name you want for the document, Click "Save"



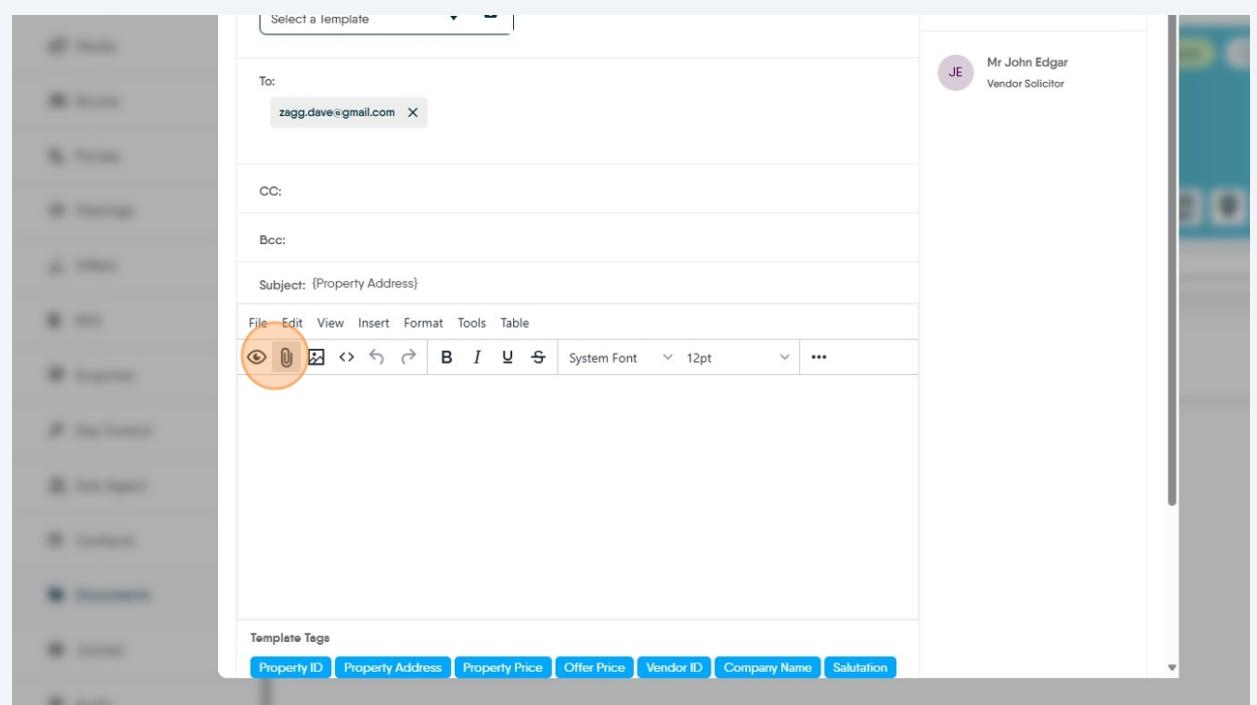
To Send the Document to the Vendor

8 Click onto the Vendors name



The screenshot shows the iam property software interface. At the top, there are navigation links: My day, Lettings, Sales, Accounts, Reporting, Communications, and a CRM link. Below the navigation is a search bar and a 'My' button. The main content area displays a property listing for 7683 Pelaw Crescent, Chester le Street, DH2 2HX, with a guide price of £249,000. A 'Lead vendor: Sales Vendor101' is listed. A 'View Vendors' button is highlighted with a yellow circle. The interface includes a sidebar with links to Media, Rooms, Portals, Viewings, Offers, NOI, Enquiries, Key Control, Sub-Agent, Contacts, and Documents. Below the sidebar, there are buttons for 'Add Document' and 'Sort Documents', and a search bar. A document titled 'Sales Brochure For 7683 Pelaw Cres' is listed, showing it is a PDF, 165.7 KB, and was created on 04/08/2025.

9 From this email screen, click here.



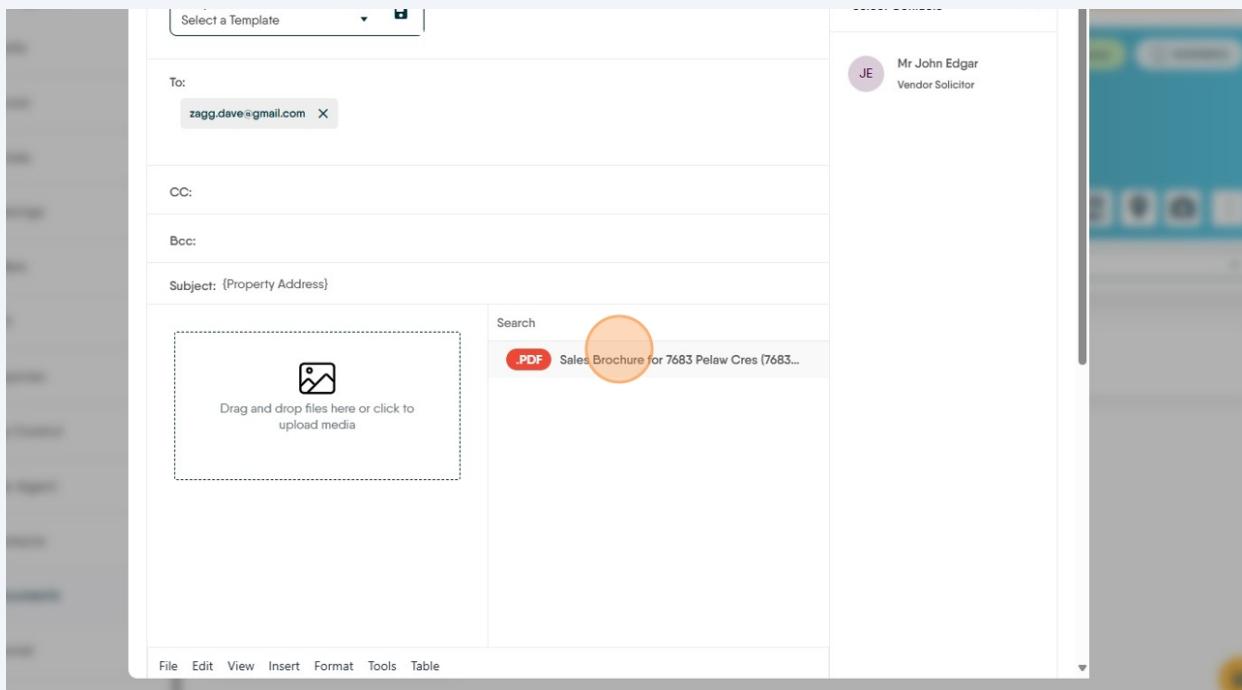
The screenshot shows an email editor interface. At the top, there is a 'Select a template' dropdown. The 'To:' field contains 'zagg.dave@gmail.com'. On the right, there is a contact card for 'Mr John Edgar, Vendor Solicitor'. The main area is a rich text editor with a toolbar. The 'Attachment' icon (a paperclip) is highlighted with a yellow circle. Below the toolbar, there is a 'Template Tags' section with buttons for Property ID, Property Address, Property Price, Offer Price, Vendor ID, Company Name, and Salutation.

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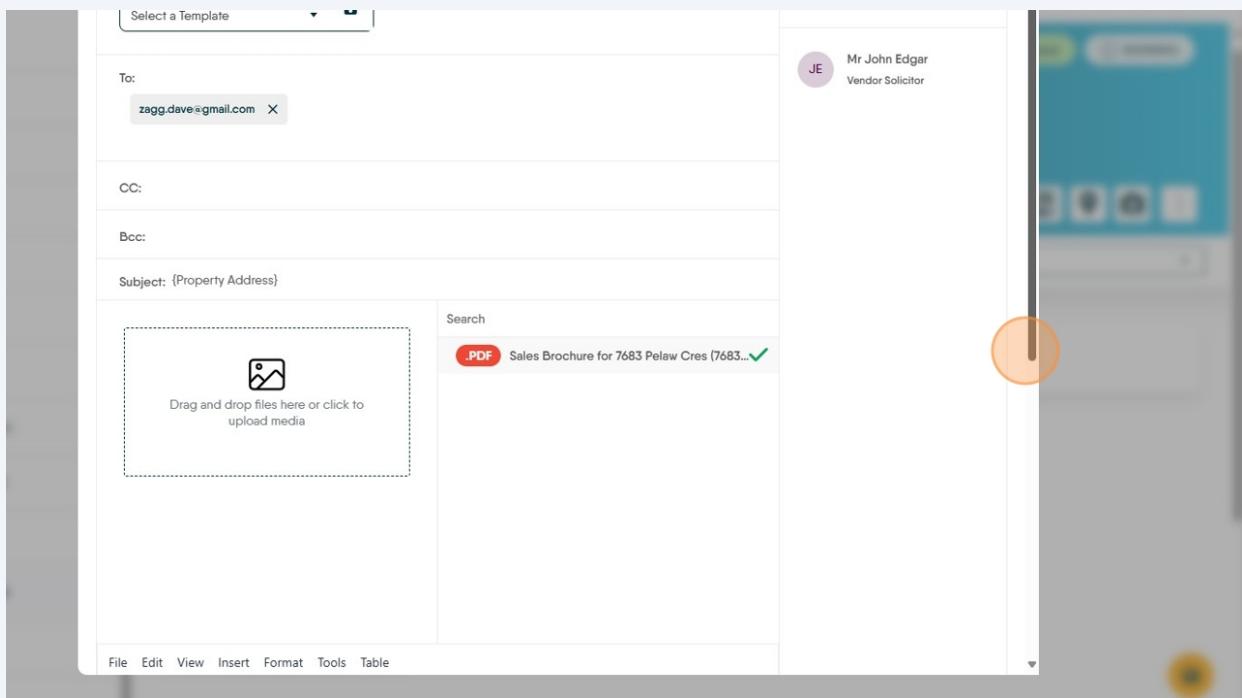
The documents uploaded to the property record will show on the right side of the screen. Click to select the document you want to email.

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

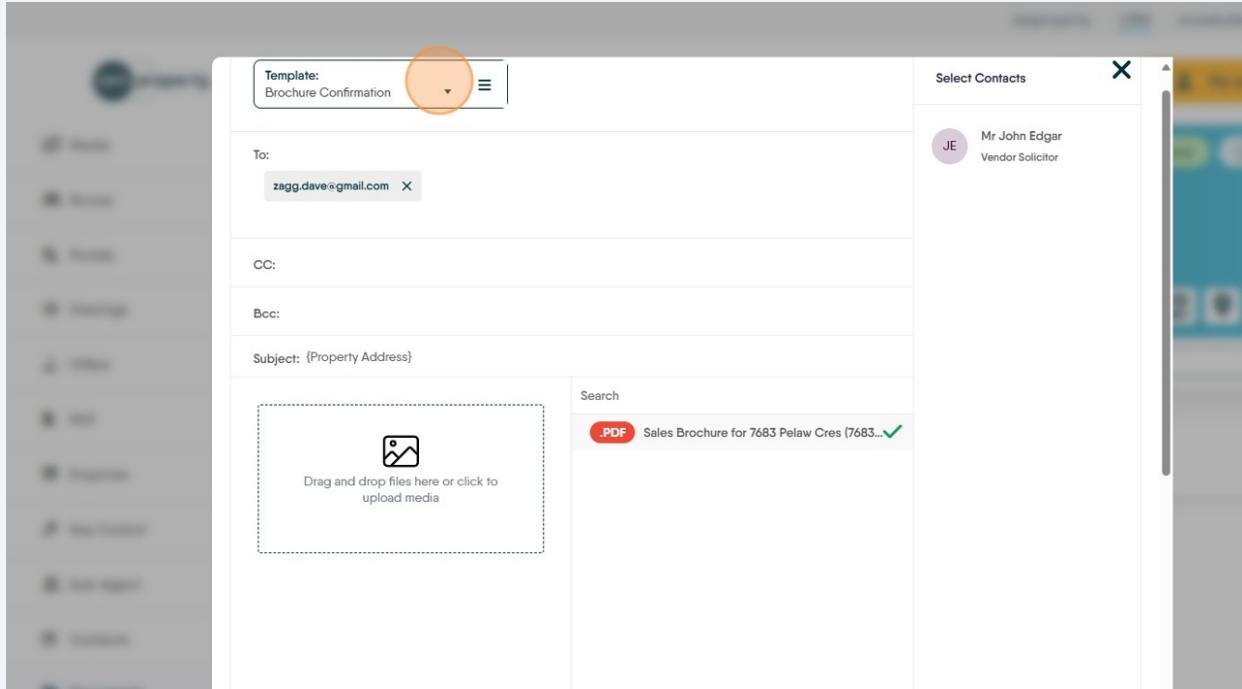
If you want to send the document to another recipient e.g. a prospective Purchaser or Tenant then add their email to the 'To' field and remove the original email.

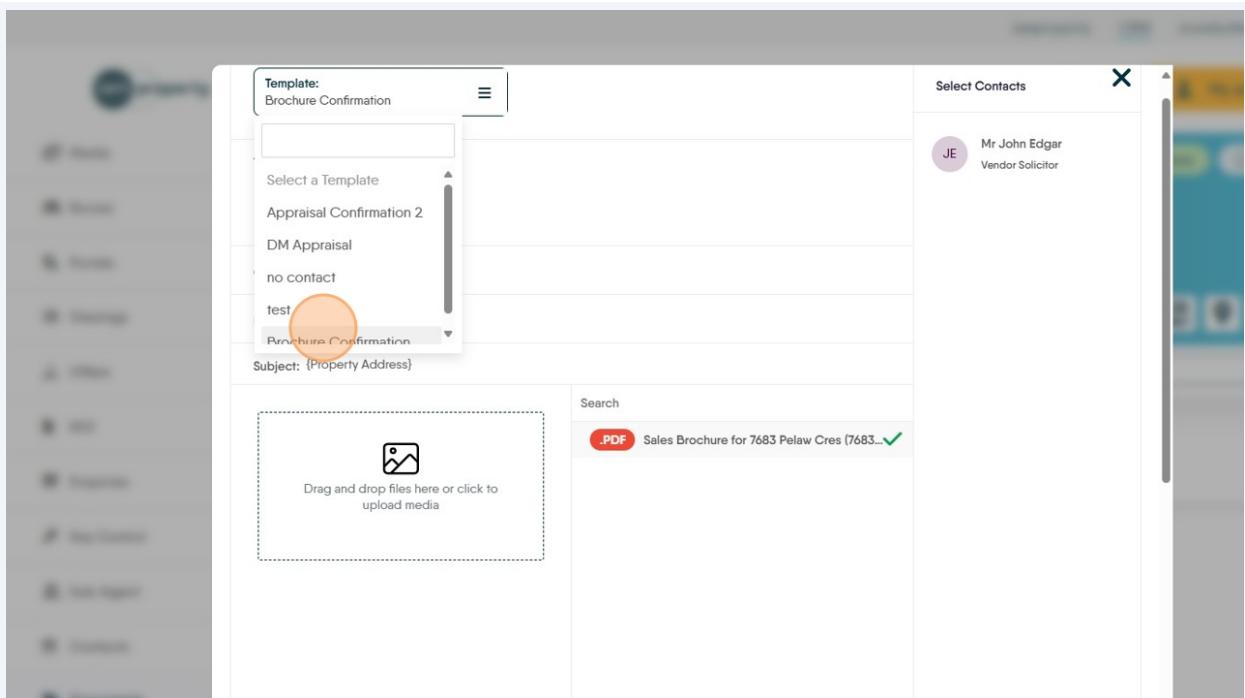


11 A green tick will show the document is selected.

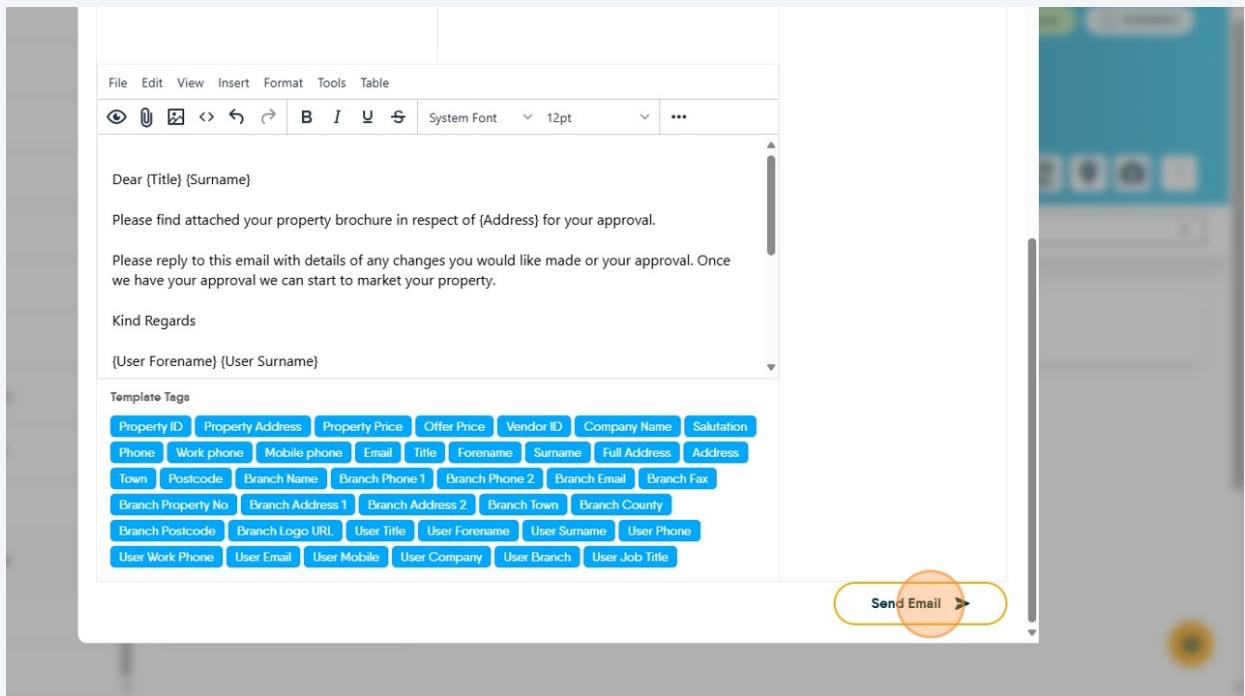


12 Either type your email message in the message screen or (if you have one created) select a template from the menu.
In this case we do so, click "Brochure Confirmation"





13 Click "Send Email"



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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.