

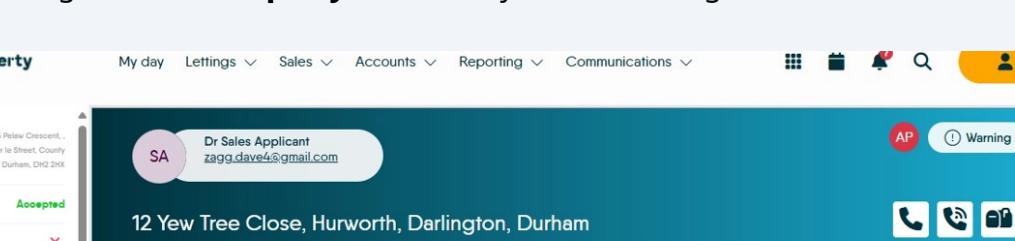
Generating and Sending Individual Memo of Sale Emails



If you are not using the Mass MOS option in CRM, the process detailed below is how you will send an MOS letter to each individual recipient that needs to be sent the MOS.

1 Navigate to the **Property** and **Offer** you are sending the MOS for.

1 Navigate to the **Property** and **Offer** you are sending the MOS for.



My day Lettings Sales Accounts Reporting Communications My account

236,000.00 7255 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX

Accepted

Offer Status: Accepted

Offer Temp: 13:16 08/08/2023

Offer made: 09/08/2024 16:10

Offer Reference: SA Dr Sales Applicant zagg.dave4@gmail.com

Offer Negotiator: Training Dave

Offer Branch: Morgan & Co

Offer Status: No status

Offer Add Offer

Offer Sort Offers

Offer Date Range: 31/07/2024 - 31/07/2025

Offer Search

Offer Clear filters

Offer Accepted @ 23 Jul 2025

Offer £ 236,000.00

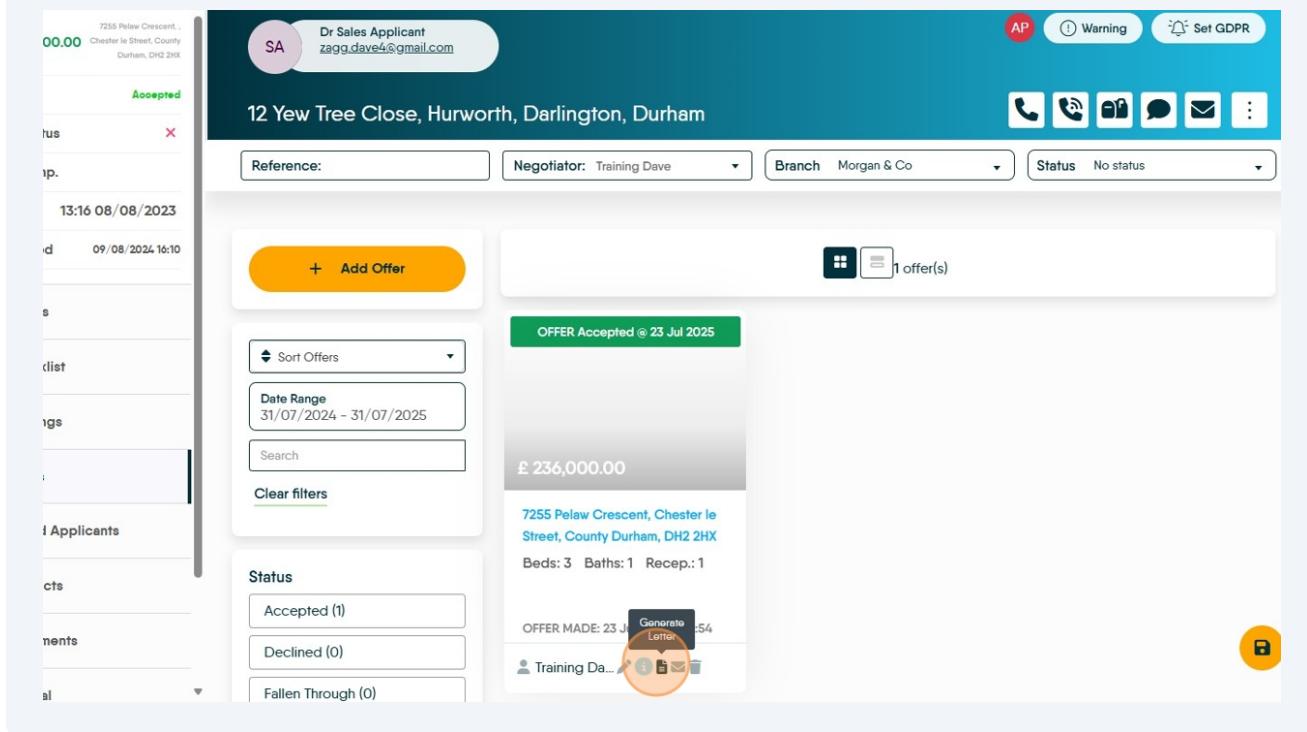
Offer 7255 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX

Offer Beds: 3 Baths: 1 Recep: 1

Offer Accepted (1)

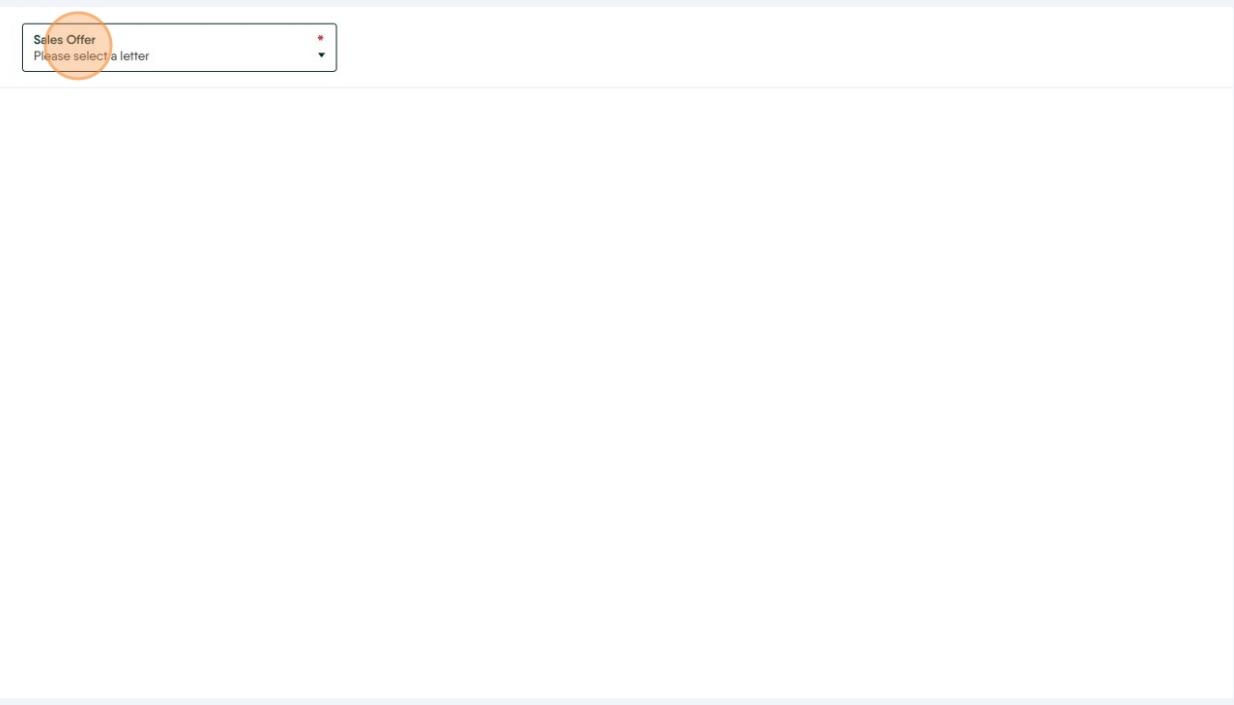
Offer OFFER MADE: 23 J Generate 54

2 Click here , the **Generate Letter** option



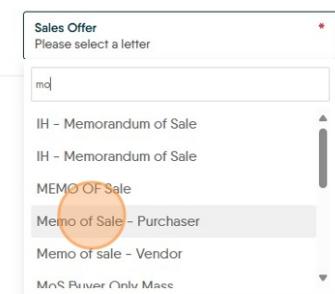
00.00 Dr Sales Applicant
7255 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX
Accepted
12 Yew Tree Close, Hurworth, Darlington, Durham
Reference: Negotiator: Training Dave Branch: Morgan & Co Status: No status
13:16 08/08/2023 09/08/2024 16:10
+ Add Offer
Sort Offers Date Range 31/07/2024 - 31/07/2025
Search Clear filters
Status Accepted (1) Declined (0) Fallen Through (0)
OFFER Accepted @ 23 Jul 2025
£ 236,000.00
7255 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX
Beds: 3 Baths: 1 Recep.:1
OFFER MADE: 23 Jul 2025 16:16:54
Training Da... Generate Letter
1 offer(s)

3 Click "Please select a letter"



Sales Offer
Please select a letter

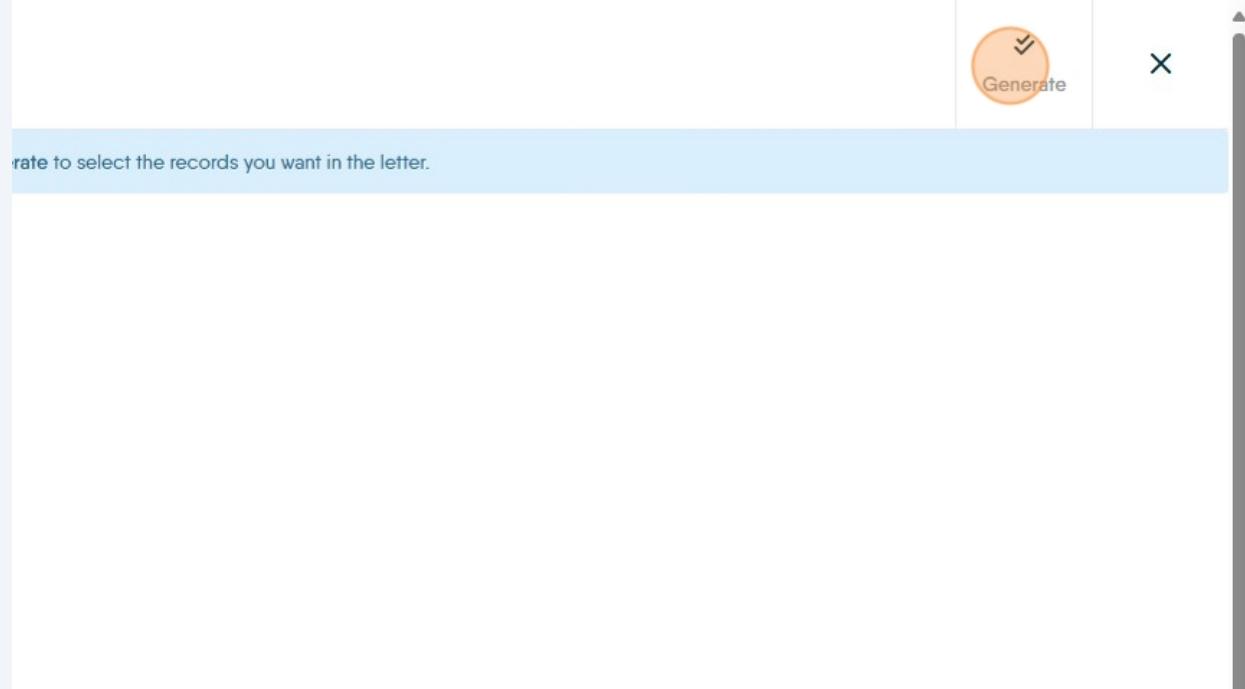
4 select your letter from the drop down menu



Sales Offer *
Please select a letter

mem
IH - Memorandum of Sale
IH - Memorandum of Sale
MEMO OF Sale
Memo of Sale - Purchaser
Memo of sale - Vendor
MoS Purser Only Macro

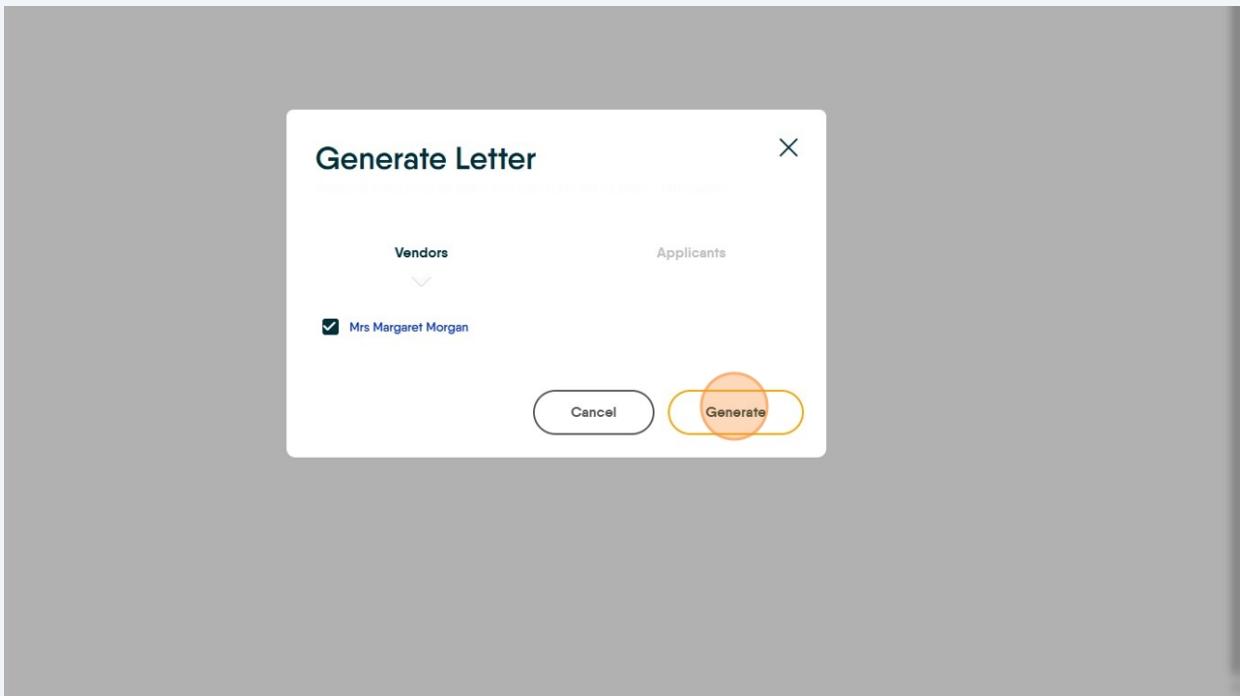
5 Click **"Generate"**



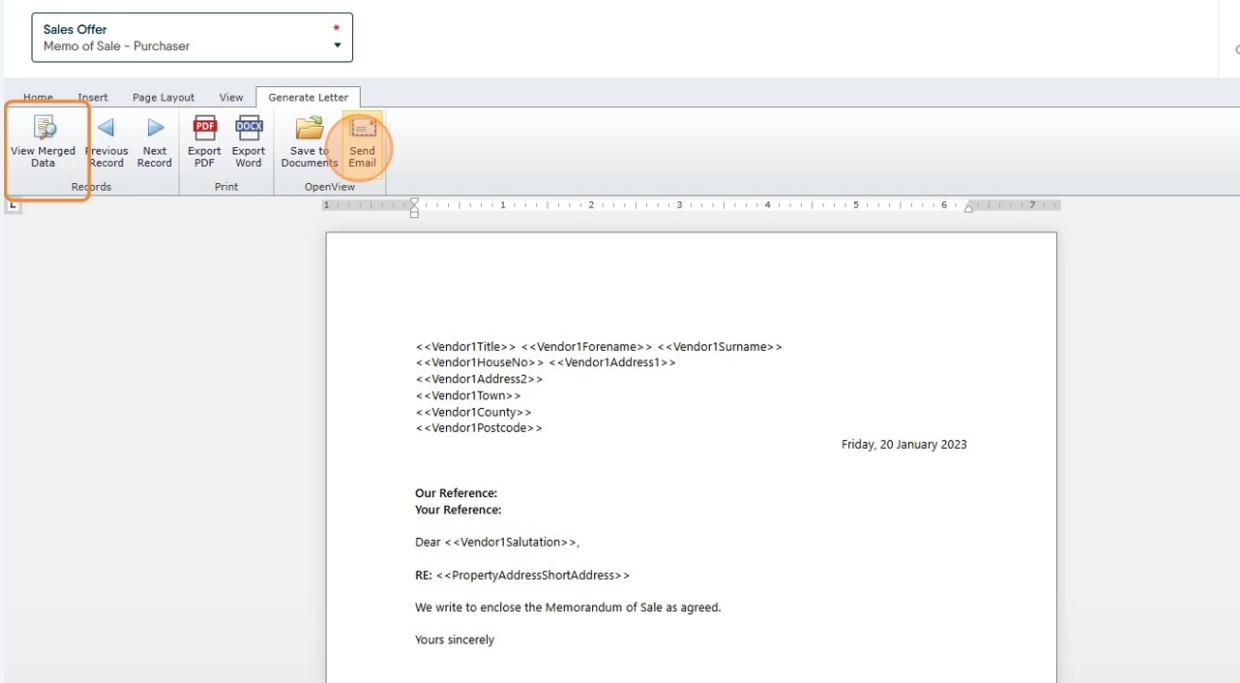
Select the records you want in the letter.

Generate

6 Check the the details of the Vendor and Applicant are correct. Click "**Generate**"

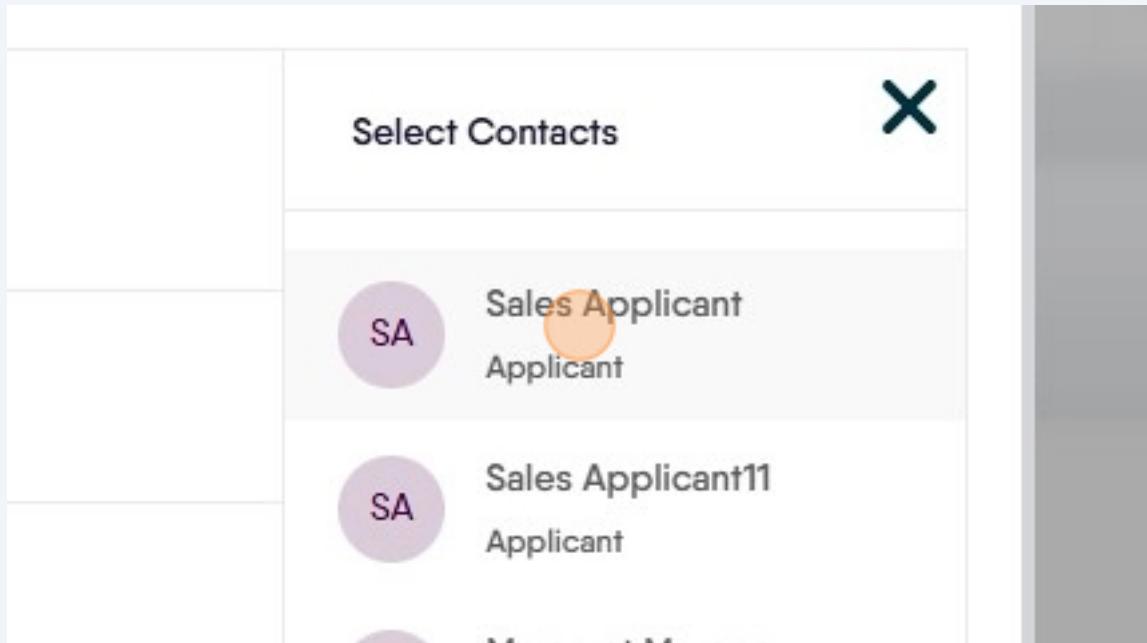


7 The letter will show on the screen with the merge tags showing. If you want to check the letter before sending click on the 'View Merged Data' icon. Click "**Send Email**".



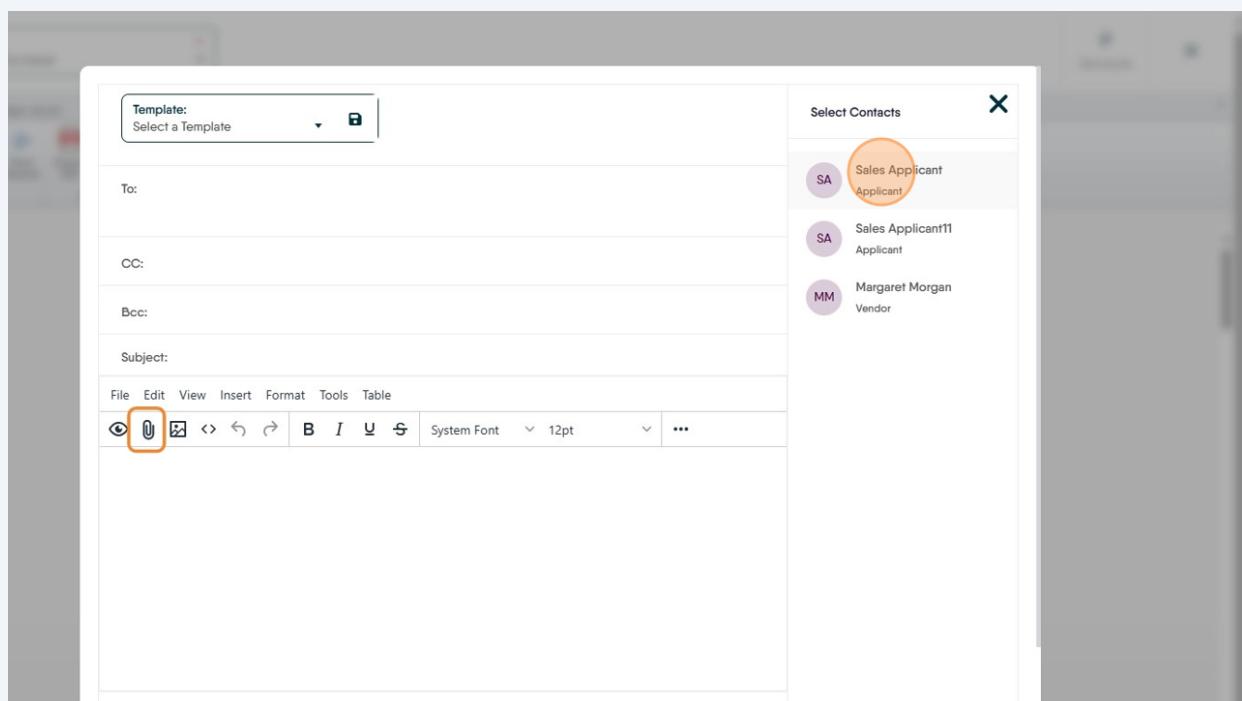
8

The letter will be converted to PDF and attached to the email, to view the attachment click the 'paperclip' icon in the email tool bar. The 'eye' icon will allow you to preview the letter.



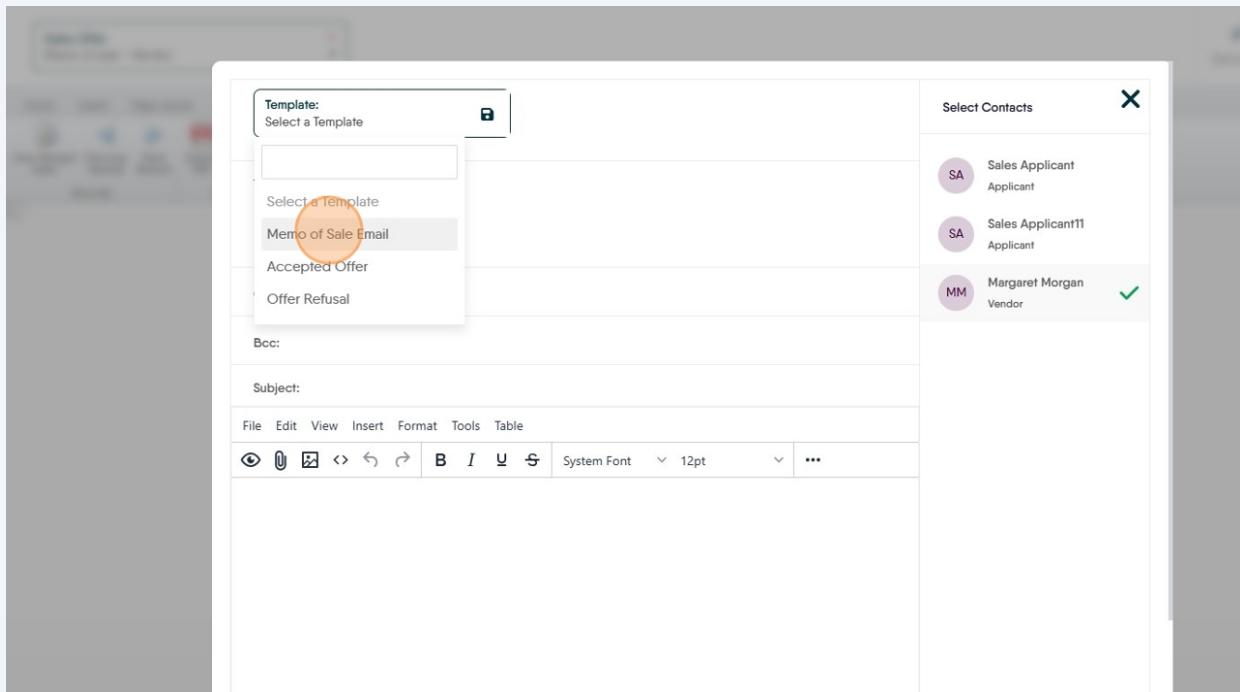
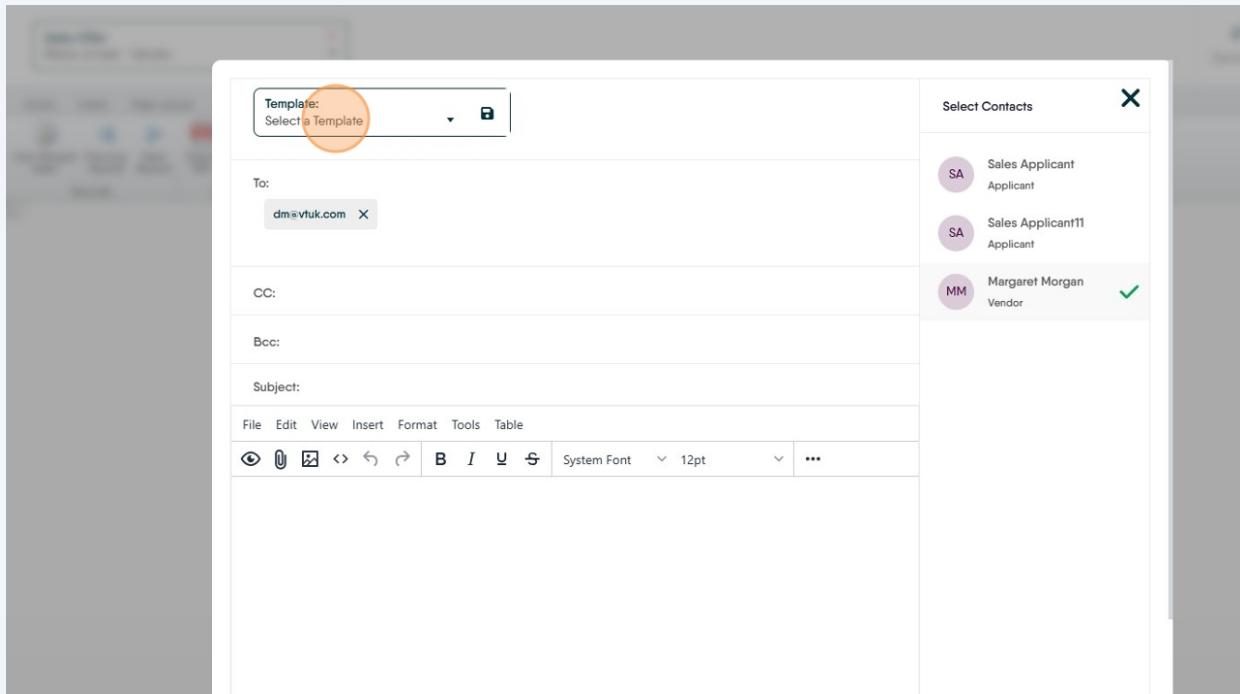
9

Select who you are sending the letter to from the contacts list. For example, Click "Sales Applicant"

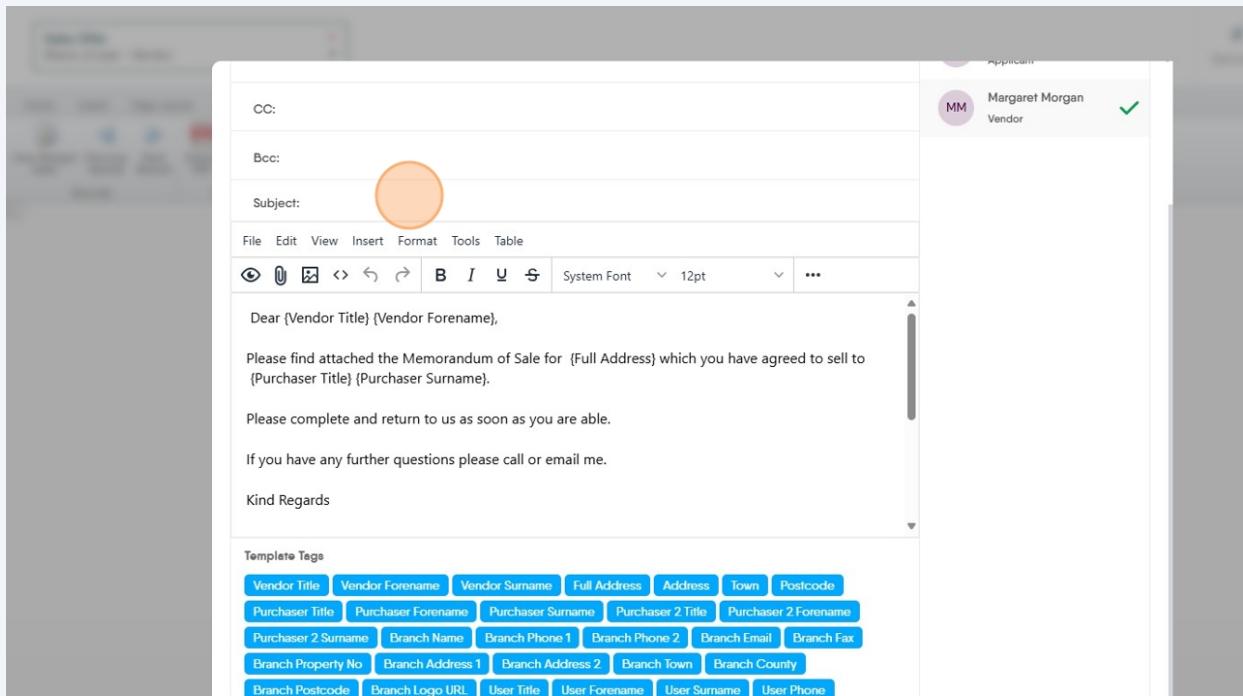


10

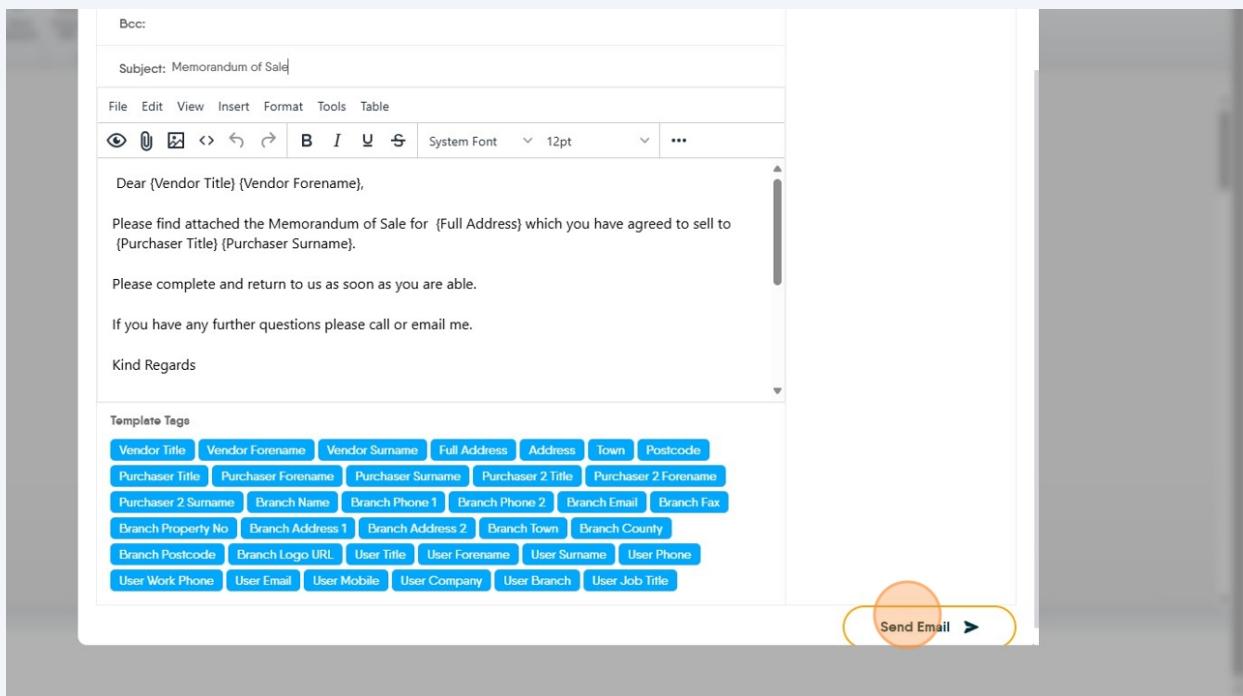
Click **"Select a Template"** if you have templates created they will show in the drop down menu, select the appropriate template. n.b. templates are created by you/your company
In this case we selected Click **"Memo of Sale Email"**



11 Click the "Subject:" field and add the subject of the email.

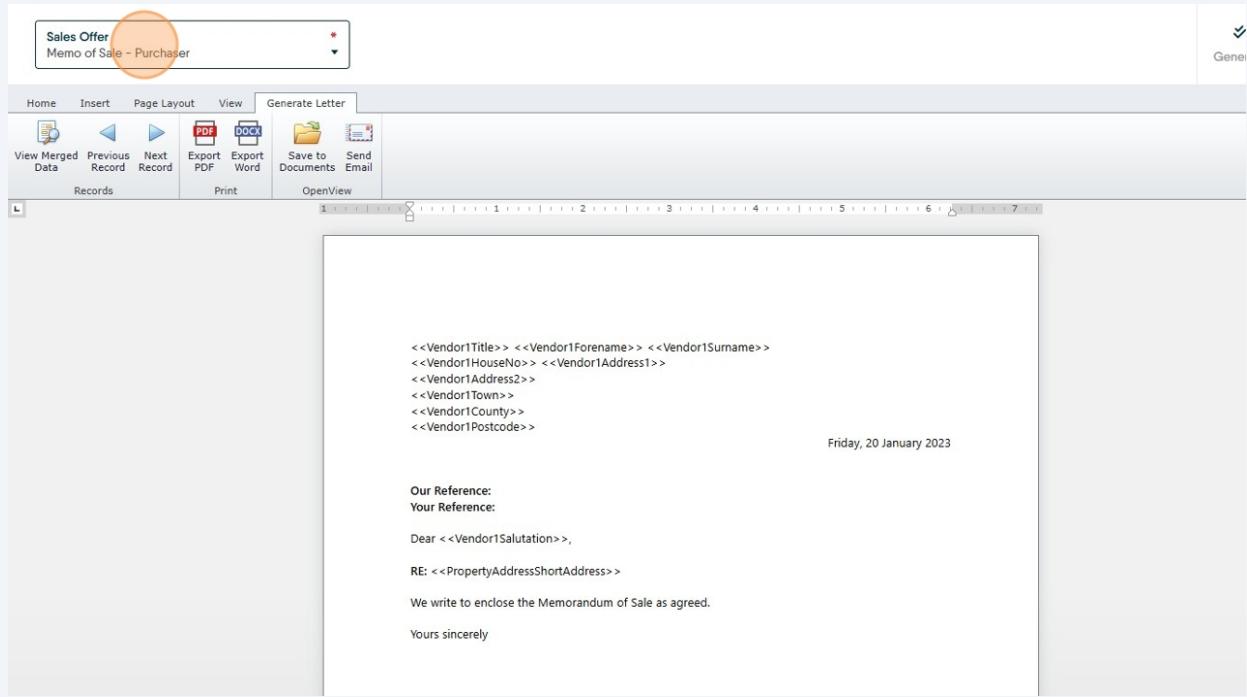


12 Click "Send Email"



13 Repeat this to send the MOS to all other recipients

14 Click "Memo of Sale - Purchaser"



15 Click "Memo of sale - Vendor"

