

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.

The screenshot displays the 'iam property' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The user is logged in as 'Dr Sales Applicant' with email 'zagg.dave4@gmail.com'. The main header shows the property address '12 Yew Tree Close, Hurworth, Darlington, Durham'. Below this, there are filters for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (No status). The left sidebar contains a list of menu items: 'Status', 'Accepted', 'if Status', 'if Temp.', 'tacted', 'Details', 'Checklist', 'Viewings', 'Offers' (highlighted), 'Linked Applicants', and 'Contacts'. The main content area shows a list of offers. The first offer is 'OFFER Accepted @ 23 Jul 2025' for '£ 236,000.00' at '7255 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX'. The offer details include 'Beds: 3', 'Baths: 1', and 'Recep.: 1'. The status is 'Accepted (1)'. There is a 'Generate' button at the bottom right of the offer details.

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

The screenshot displays a web application interface for managing real estate offers. On the left is a sidebar with a list of items, including 'Accepted', '13:16 08/08/2023', and '09/08/2024 16:10'. The main header area shows the user's profile as 'Dr Sales Applicant' with email 'zagg.dave4@gmail.com' and a location '12 Yew Tree Close, Hurworth, Darlington, Durham'. Navigation icons for phone, mail, and other functions are present. Below the header, there are filters for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status' (No status). A central panel features a '+ Add Offer' button, a 'Sort Offers' dropdown, a 'Date Range' filter (31/07/2024 - 31/07/2025), a search bar, and a 'Clear filters' link. To the right, a card displays an 'OFFER Accepted @ 23 Jul 2025' for a property at '7255 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX' with a price of '£ 236,000.00'. The card also lists 'Beds: 3 Baths: 1 Recep.: 1' and shows a 'Generate Letter' button. A 'Training Dave' profile is visible at the bottom of the offer card.

3 Click "**Please select a letter**"

The screenshot shows a dropdown menu with the text 'Sales Offer' and 'Please select a letter'. The dropdown is currently open, showing a list of options. The text 'Please select a letter' is highlighted in orange, indicating the target for the next step.

4 select your letter from the drop down menu

Sales Offer

Please select a letter

md

- IH - Memorandum of Sale
- IH - Memorandum of Sale
- MEMO OF Sale
- Memo of Sale - Purchaser
- Memo of sale - Vendor
- Memo of Sale - Only Mass

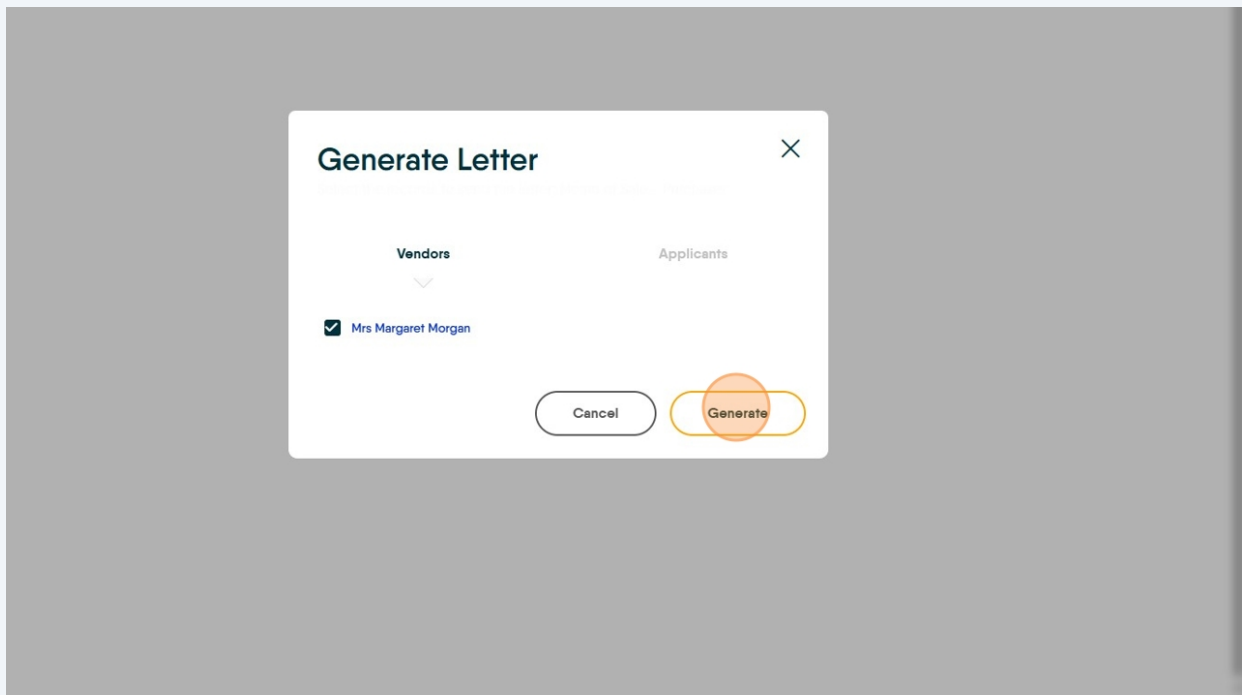
5 Click "Generate"

Generate

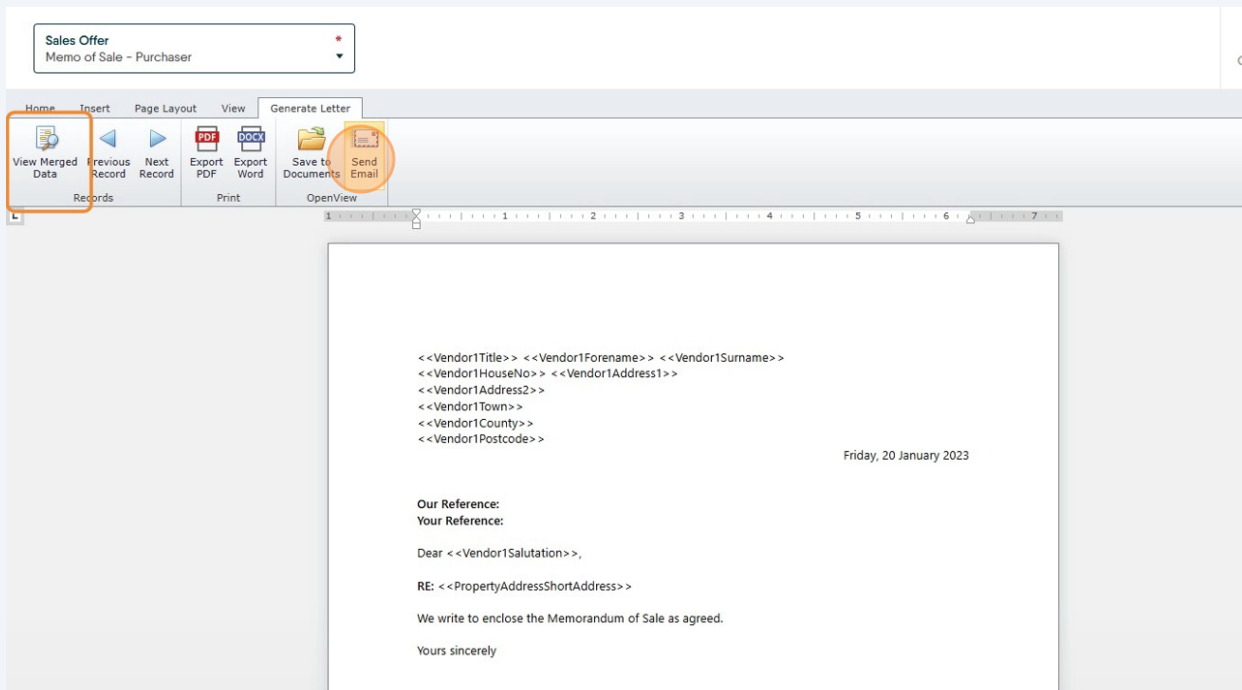
×

rate to select the records you want in the letter.

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

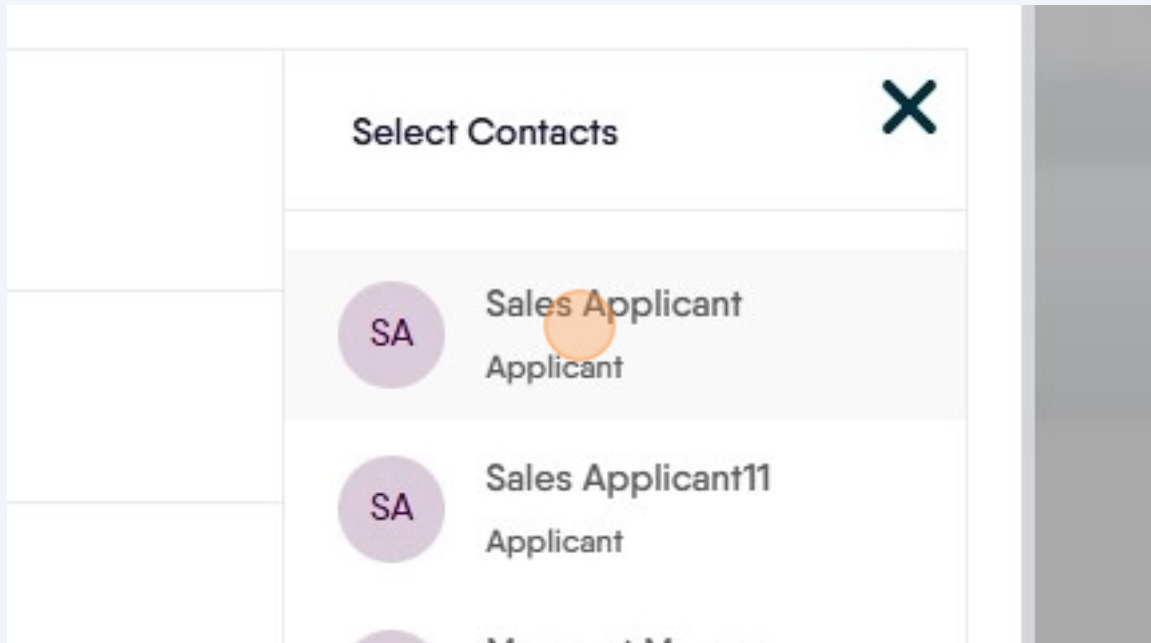


- 7 The letter will show on the screen with the merge tags showing. If you want to check the letter before sending click on the 'View Merged Data' icon. Click **"Send Email"**.



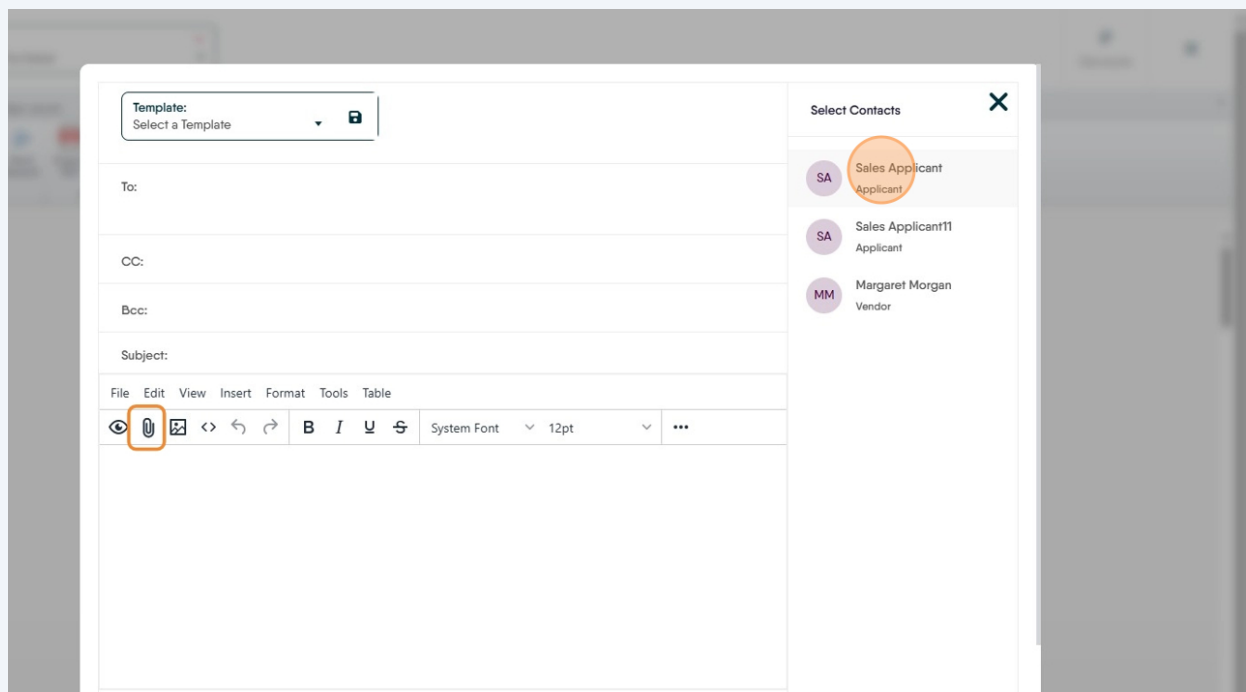
8

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"



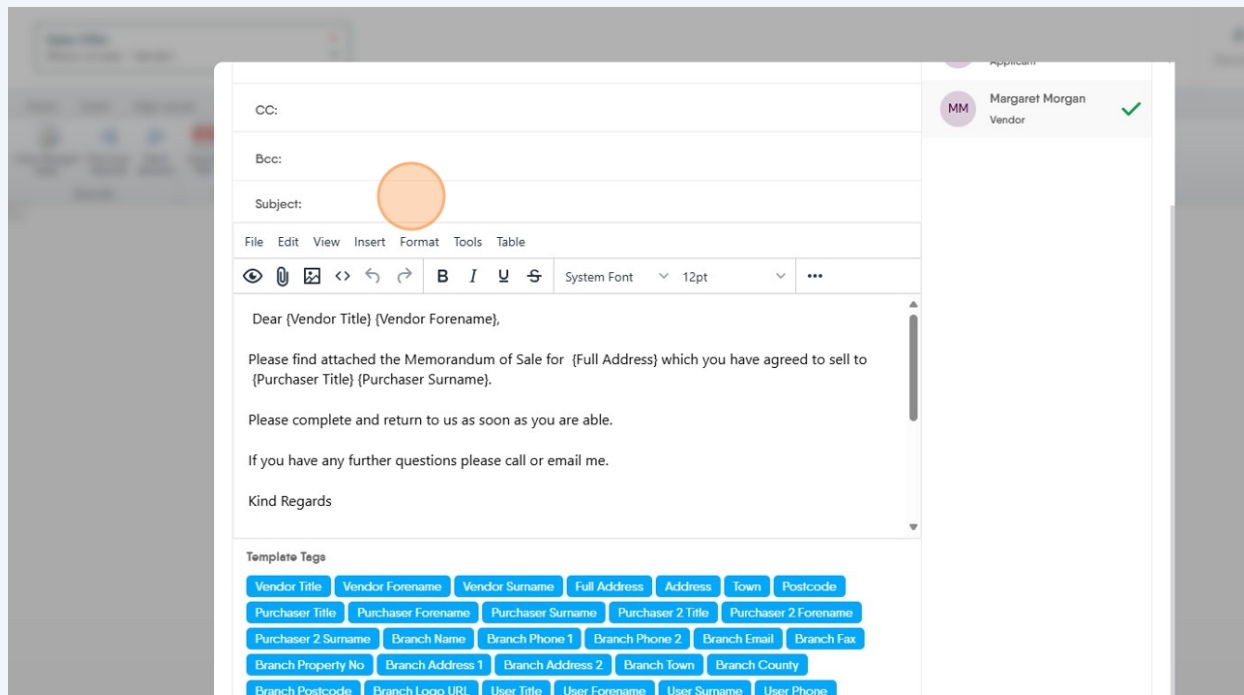
10

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"**

The screenshot shows an email composition window. At the top left, there is a 'Template:' dropdown menu with the text 'Select a Template' and a lock icon. Below this, the 'To:' field contains 'dm@vtuk.com'. The 'CC:', 'Bcc:', and 'Subject:' fields are empty. A menu bar with 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', and 'Table' is visible. Below the menu bar is a toolbar with icons for undo, redo, bold, italic, underline, and strikethrough, followed by font settings 'System Font' and '12pt'. On the right side, there is a 'Select Contacts' panel with a list of contacts: 'SA Sales Applicant Applicant', 'SA Sales Applicant11 Applicant', and 'MM Margaret Morgan Vendor'. The 'MM' contact is selected, indicated by a green checkmark.

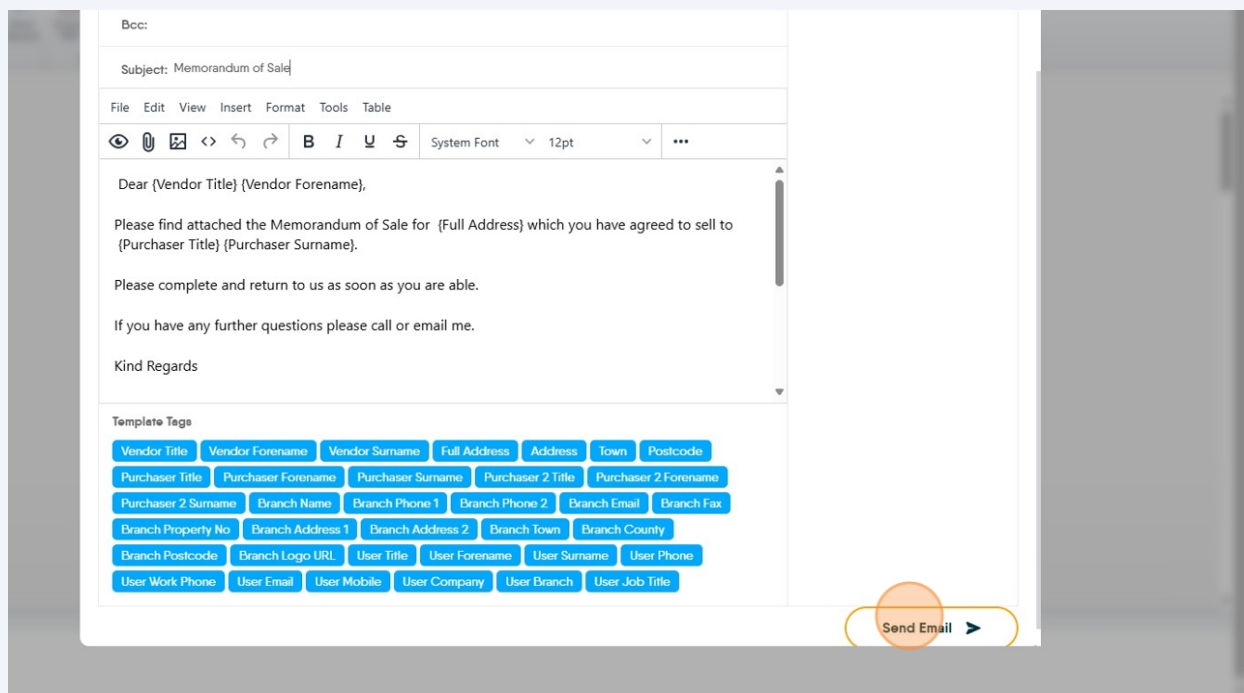
The screenshot shows the same email composition window, but the 'Template:' dropdown menu is open, displaying a list of options: 'Select a Template', 'Memo of Sale Email', 'Accepted Offer', and 'Offer Refusal'. The 'Memo of Sale Email' option is highlighted with a grey background. The rest of the window, including the 'To:' field, 'CC:', 'Bcc:', 'Subject:' fields, menu bar, toolbar, and 'Select Contacts' panel, remains the same as in the previous screenshot.

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



The screenshot shows an email composition window. The "Subject:" field is highlighted with an orange circle. The email body contains a template with placeholder text: "Dear {Vendor Title} {Vendor Forename},", "Please find attached the Memorandum of Sale for {Full Address} which you have agreed to sell to {Purchaser Title} {Purchaser Surname}.", "Please complete and return to us as soon as you are able.", "If you have any further questions please call or email me.", and "Kind Regards". A "Template Tags" section at the bottom lists various fields like Vendor Title, Purchaser Title, Branch Name, etc., each with a corresponding placeholder in the email body. A sidebar on the right shows a contact named Margaret Morgan, Vendor, with a green checkmark.

12 Click "Send Email"



The screenshot shows the same email composition window as in step 11. The "Subject:" field now contains the text "Subject: Memorandum of Sale". The "Send Email" button at the bottom right is highlighted with an orange circle. The email body content remains the same as in step 11.

13 Repeat this to send the MOS to all other recipients

14 Click "Memo of Sale - Purchaser"

Sales Offer
Memo of Sale - Purchaser

Home Insert Page Layout View Generate Letter

View Merged Data Previous Record Next Record Export PDF Export Word Save to Documents Send Email

Records Print OpenView

1 2 3 4 5 6 7

<<Vendor1Title>> <<Vendor1Forename>> <<Vendor1Surname>>
<<Vendor1HouseNo>> <<Vendor1Address1>>
<<Vendor1Address2>>
<<Vendor1Town>>
<<Vendor1County>>
<<Vendor1Postcode>>

Friday, 20 January 2023

Our Reference:
Your Reference:

Dear <<Vendor1Salutation>> ,

RE: <<PropertyAddressShortAddress>>

We write to enclose the Memorandum of Sale as agreed.

Yours sincerely

15 Click "Memo of sale - Vendor"

The screenshot shows a software interface for generating a memorandum of sale. On the left, a dropdown menu titled "Sales Offer" is open, showing several options. The option "Memo of sale - Vendor" is highlighted with an orange circle. The main area of the interface displays a template for a memorandum of sale letter, with placeholder text for vendor details and a date.

Sales Offer
Memo of Sale - Purchaser

View

Send Email

1 2 3 4 5 6 7

<<Vendor1Title>> <<Vendor1Forename>> <<Vendor1Surname>>
<<Vendor1HouseNo>> <<Vendor1Address1>>
<<Vendor1Address2>>
<<Vendor1Town>>
<<Vendor1County>>
<<Vendor1Postcode>>

Friday, 20 January 2023

Our Reference:
Your Reference:

Dear <<Vendor1Salutation>> ,

RE: <<PropertyAddressShortAddress>>

We write to enclose the Memorandum of Sale as agreed.

Yours sincerely