

# Creating Matching Templates in CRM



This guide provides a comprehensive walk-through for creating matching templates in the CRM system, which is essential for optimising property listings and enhancing communication with clients. By following these steps, you will be able to create a template to assist in sending property details to clients.

1

Matching Templates are used when sending property matches to applicants from the property matching tool.

There are 2 Matching templates to create, **Sales** and **Lettings**. Both have the same process to set up, however the merge tags work differently.

There are 2 parts to a matching template, **Single Property** match, used where only one property is matched to an applicant. **Multi Property and Property Repeater**, that are used when sending multiple property matches to 1 applicant.

2

Navigate to <https://crm.iamproperty.com/MyDay>

The screenshot shows the CRM MyDay dashboard. At the top, there is a navigation menu with items: My day, Lettings, Sales, Accounts, Reporting, and Communications. On the right, there are icons for a grid, calendar, notifications, search, and a user profile labeled 'My account'. The main heading is 'Welcome back, Training'. Below this, there are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar is present with the placeholder text 'Search all records'. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. 'Today's events' has a table with columns 'Time' and 'Name', showing one event at 12:00 named 'Test test'. 'My tasks' has a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date', listing four tasks: 'Contact Landlord re renewal', 'Call back', 'Make Tea', and 'Clean Windows', all with a status of 'Not Started' and a priority of 'High'.

Time	Name
12:00	Test test

Status	Name	Priority	Start date	Due date
Not Started	Contact Landlord re renewal	High	12/ Jun/2025	14/ Jun/2025
Not Started	Call back	High	03/ Jan/2025	03/ Jan/2025
Not Started	Make Tea	High	07/ Jan/2025	07/ Jan/2025
Not Started	Clean Windows	High	28/ Jan/2025	28/ Jan/2025

### 3 Click "My account"

iamproperty CRM movebutler iamsold

property My day Lettings Sales Accounts Reporting Communications My account

# Welcome back, Training

[Add New Record](#) [View property management](#) [Visit help centre](#)

Records

My tasks				
Status	Name	Priority	Start date	Due date
Not Started	<a href="#">Contact Landlord re renewal</a>	High	12/ Jun/2025	14/ Jun/2025
Not Started	<a href="#">Call back</a>	High	03/ Jan/2025	03/ Jan/2025
Not Started	<a href="#">Make Tea</a>	High	07/ Jan/2025	07/ Jan/2025

### 4 Click "Control centre"

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property My day Lettings Sales Accounts Reporting Communications My account

# Welcome back, Training

[Add New Record](#) [View property management](#) [Visit help centre](#)

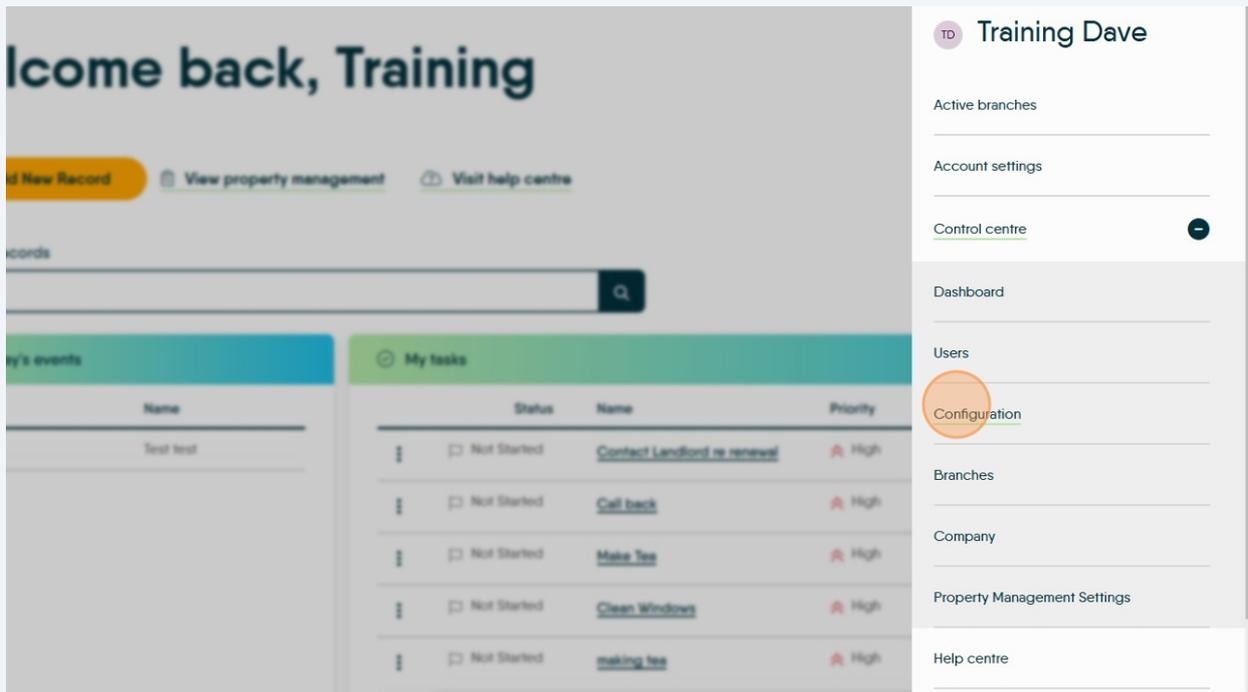
Records

My tasks				
Status	Name	Priority	Start date	Due date
Not Started	<a href="#">Contact Landlord re renewal</a>	High	12/ Jun/2025	14/ Jun/2025
Not Started	<a href="#">Call back</a>	High	03/ Jan/2025	03/ Jan/2025
Not Started	<a href="#">Make Tea</a>	High	07/ Jan/2025	07/ Jan/2025

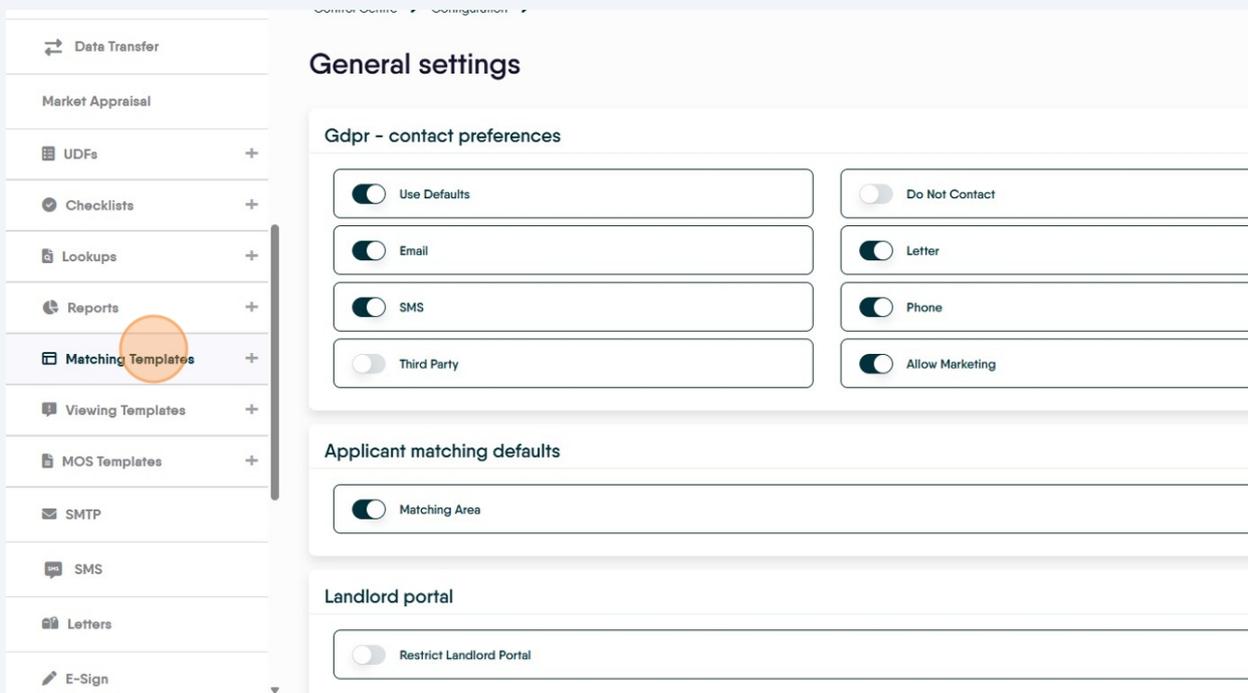
**TD Training Dave**

- Active branches
- Account settings
  - Control centre** (+)
- Help centre
- Log out

5 Click "Configuration"



6 Click "Matching templates"



7

There are 2 types, Lettings and Sales, both are the same and we will look at Lettings.

Click "Lettings"

**General settings**

**Gdpr - contact preferences**

- Use Defaults
- Email
- SMS
- Third Party
- Do Not Contact
- Letter
- Phone
- Allow Marketing

**Applicant matching defaults**

- Matching Area

**Landlord portal**

- Restrict Landlord Portal

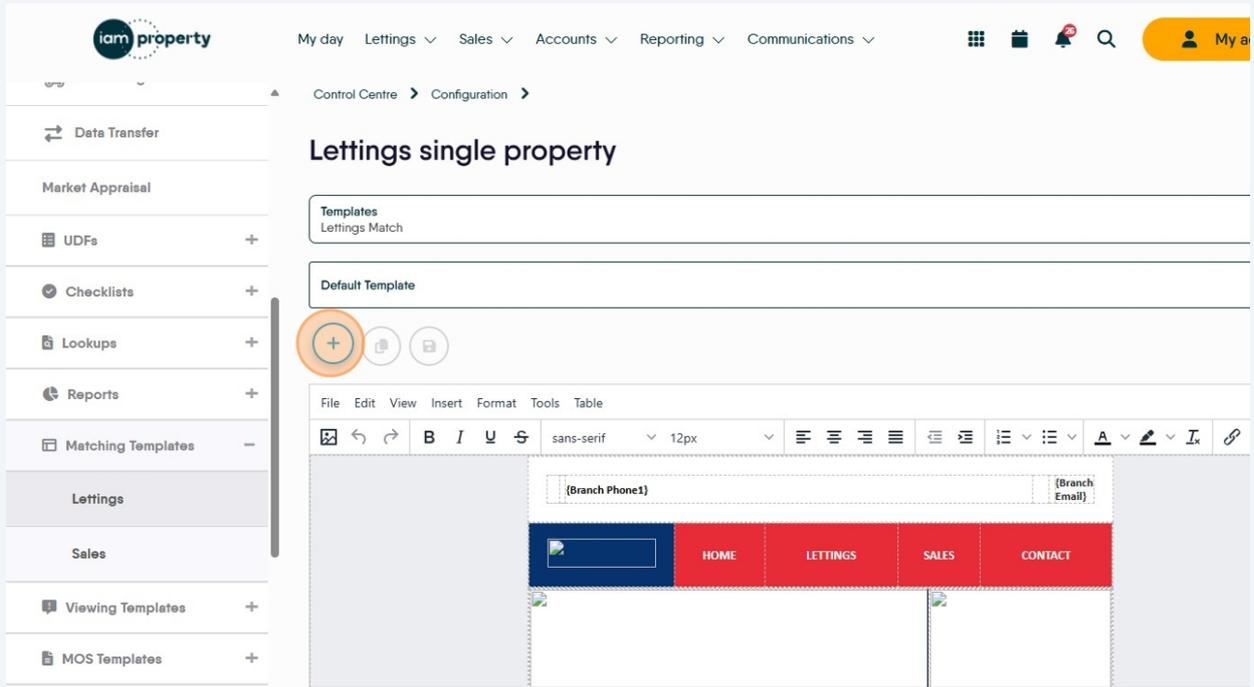
8

To create the single property option. Click "Single Property"

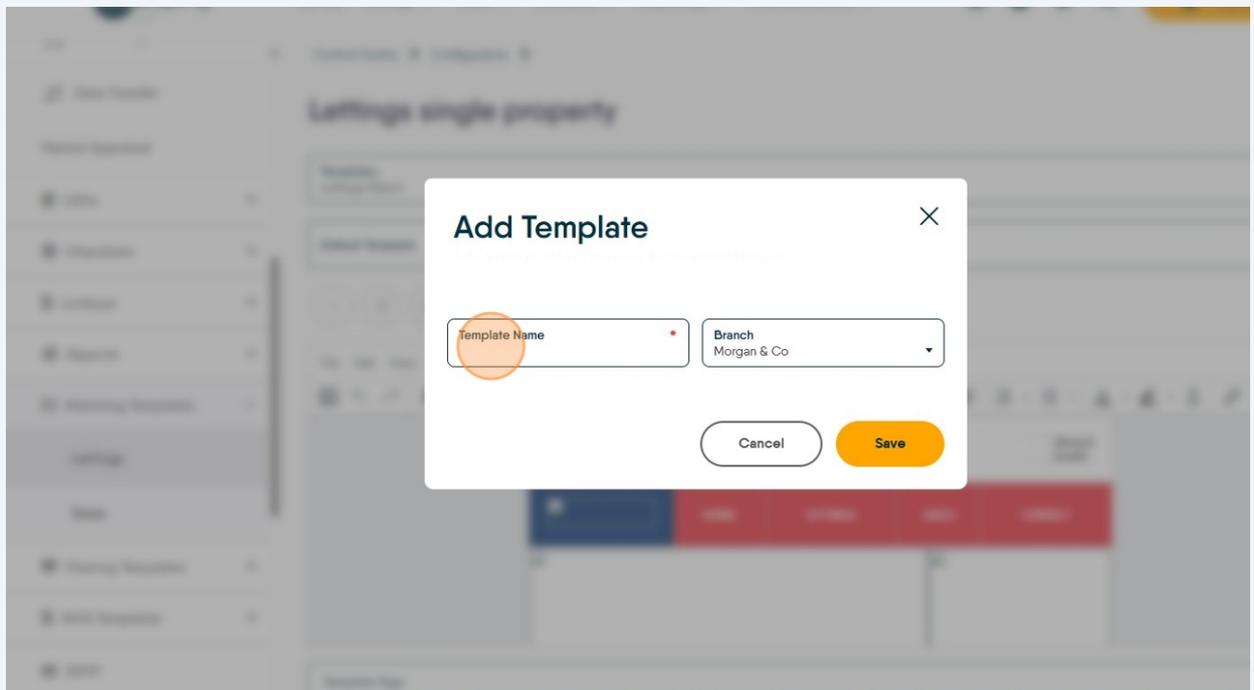
**Lettings matching templates**

- Single property
- Multiple properties
- Property repeater

9 Click here to create a new template.

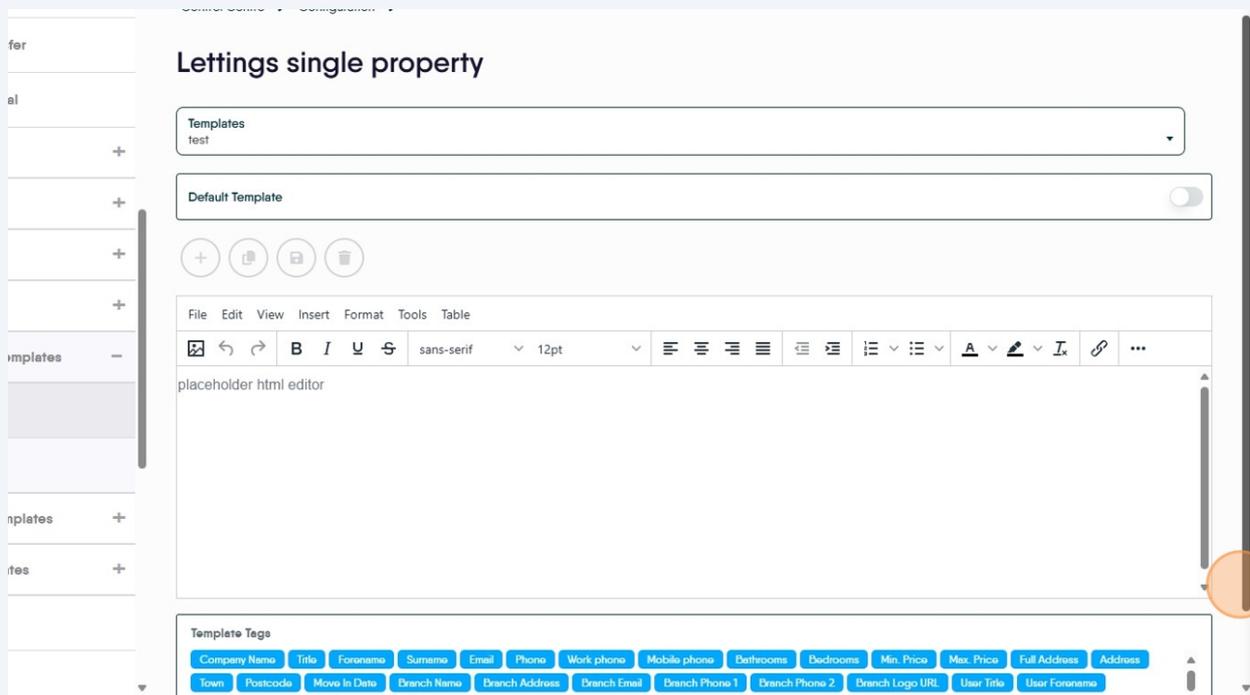


10 Click the "Template Name" field and give your new template a name.



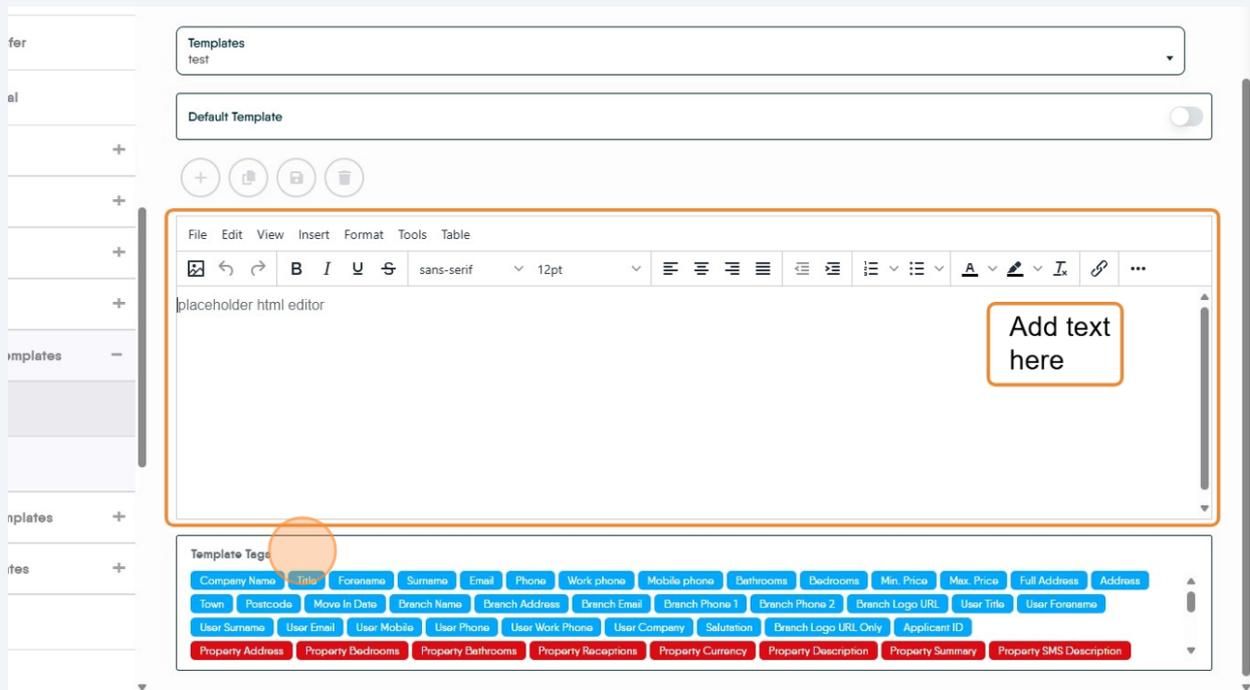
11

The template is created in the highlighted field below. There are various options, the easiest and most straightforward is to type your messages in the screen and use the Template tags to add in personalised data and property information.



12

Click "Template Tags" and click the tag you want to use, this will place it where your cursor was last set.



13

You can add images e.g. your company logo or icons etc change font types and add colours etc.

File Edit View Insert Format Tools Table

iam property

Dear {Applicant Forename},

We have matched you with new properties, fresh on the market!  
But don't hang around... the property market is on fire right now !

If you like a property you **must book viewings quickly!**

{Property Bedrooms} {Property Bathrooms}

{Property Advertising Address}

£ {Property Asking Rent} Per Week

Property Features

14

Once complete click on the 'Save' icon.

iam property

My day Lettings Sales Accounts Reporting Communications

Control Centre Configuration

Data Transfer

Market Appraisal

UDFs +

Checklists +

Lookups +

Reports +

Matching Templates -

Lettings

Sales

Viewing Templates +

MOS Templates +

Lettings single property

Templates  
Single Viewing Template

Default Template

File Edit View Insert Format Tools Table

iam property

Dear {Applicant Forename},

We have matched you with new properties, fresh on the market!  
But don't hang around... the property market is on fire right now !

If you like a property you **must book viewings quickly!**

15 Click here to copy the template to other branches in your company.

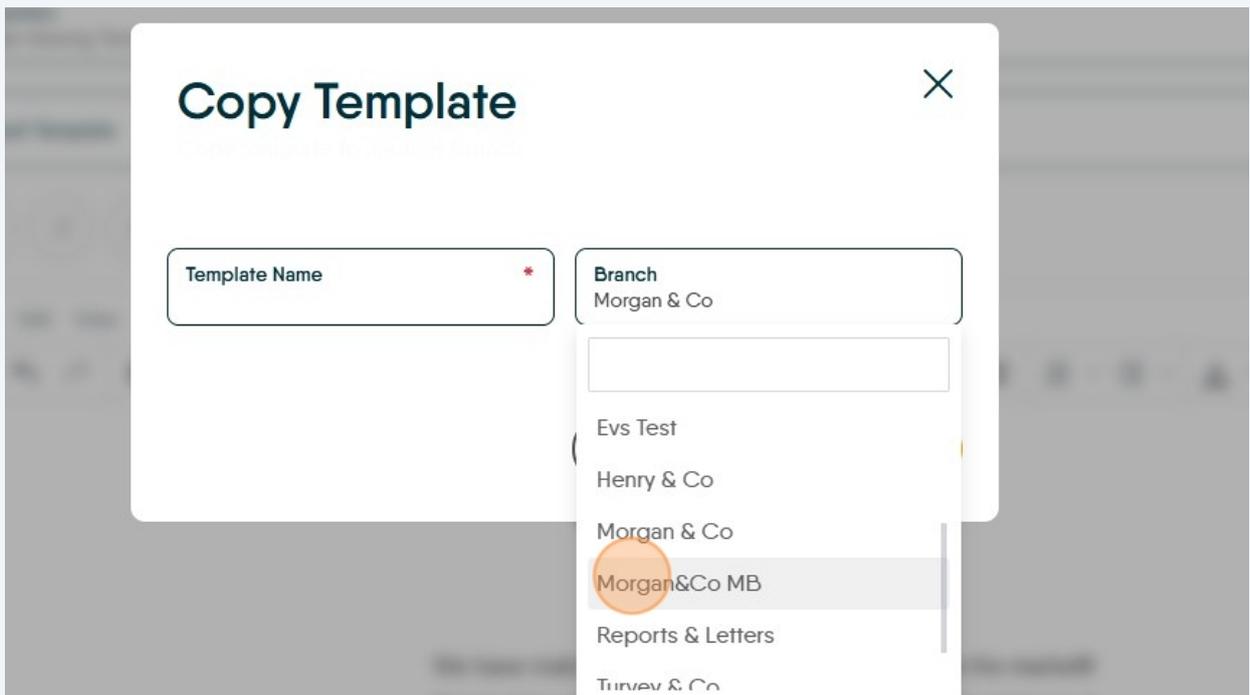
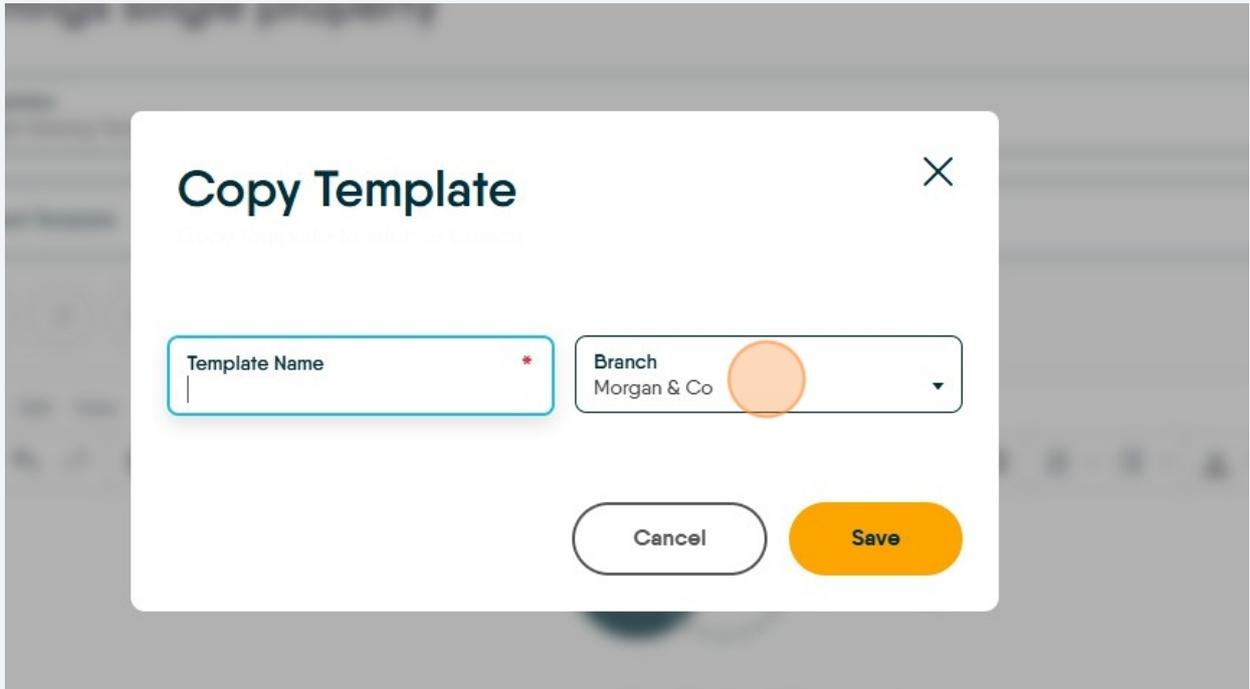
The screenshot shows the 'iam property' software interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar lists various modules: Data Transfer, Market Appraisal, UDFs, Checklists, Lookups, Reports, Matching Templates, Lettings (highlighted), Sales, Viewing Templates, and MOS Templates. The main content area is titled 'Lettings single property' and shows a 'Templates' section with 'Single Viewing Template' and a 'Default Template' section. In the 'Default Template' section, there are three icons: a plus sign, a copy icon (highlighted with an orange circle), and a trash icon. Below these icons is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with various formatting options. The editor content includes the 'iam property' logo and a personalized message: 'Dear (Applicant Forename), We have matched you with new properties, fresh on the market!! But don't hang around... the property market is on fire right now! If you like a property you must book viewings quickly!'.

16 Click the "Template Name" field and name the template.

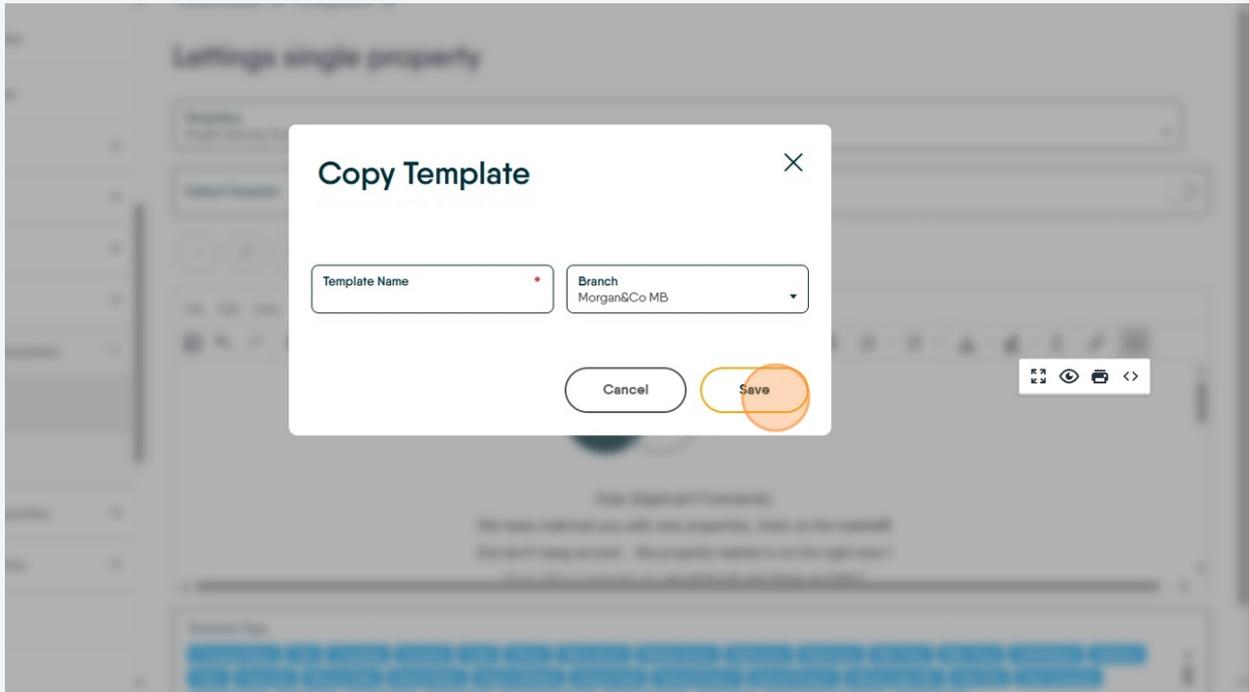
The screenshot shows a 'Copy Template' dialog box with a close button (X) in the top right corner. The dialog contains two input fields: 'Template Name' with a red asterisk indicating it is required, and 'Branch' with a dropdown menu showing 'Morgan & Co'. At the bottom of the dialog are two buttons: 'Cancel' and 'Save'.

17

Click the branch menu and select the branch to copy the template to.  
Click "Morgan & Co MB"

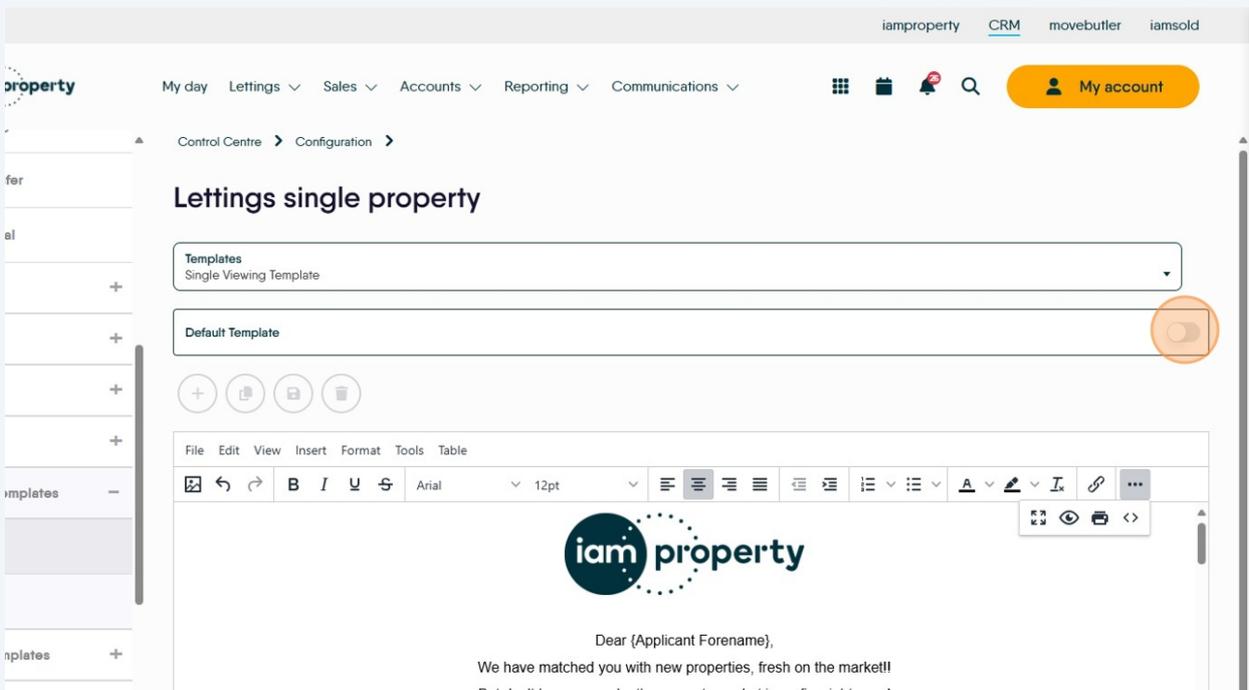


18 Click "Save"



19 That is your single property template created.

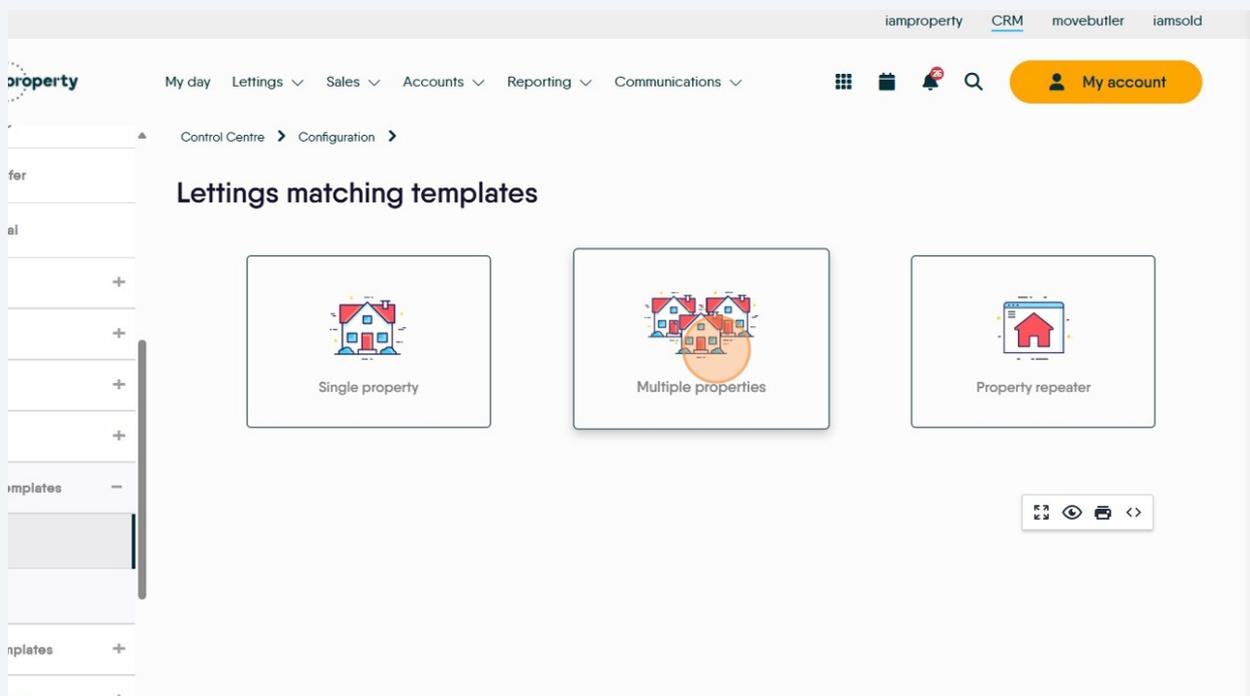
If you have multiple template options for sharing the data, you can set one template as the default, this will be used unless the user selects a different option. Click here to set this template as default.



# Multiple Property Template

20 This is for when the applicant has matched to multiple properties.

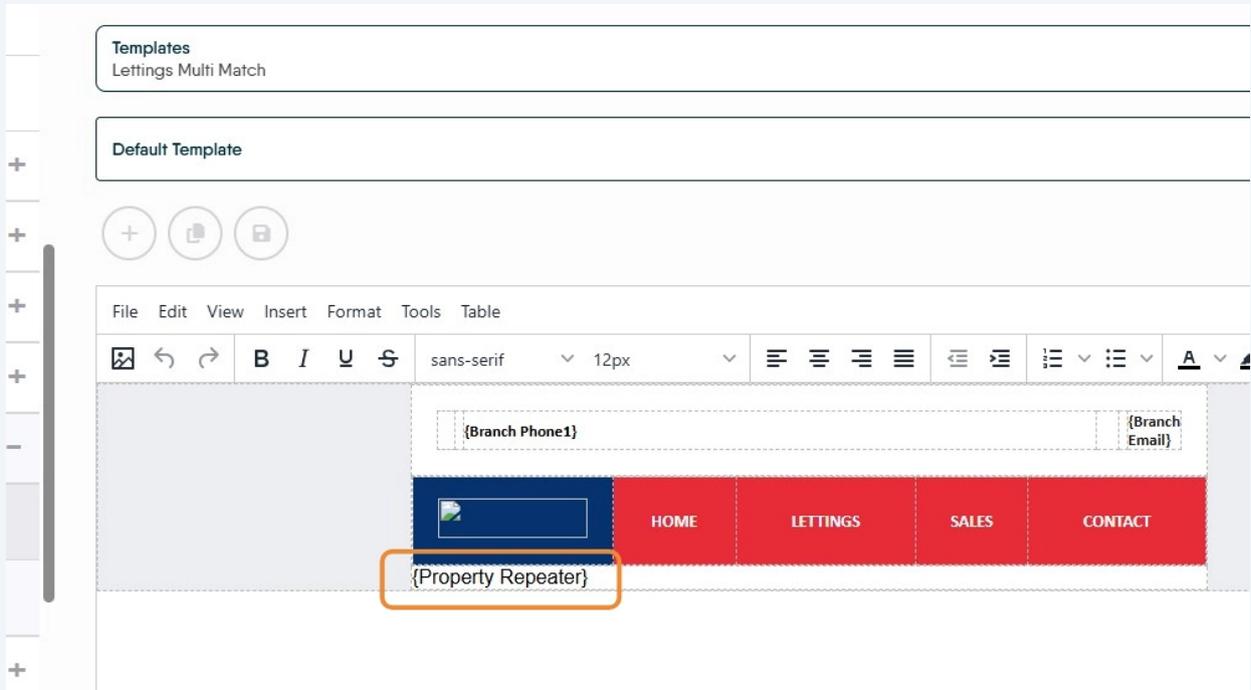
21 Click 'Multiple Properties'.



22

The multiple properties template is a header for the 'Property Repeater' which is what collects and adds the multiple property details.

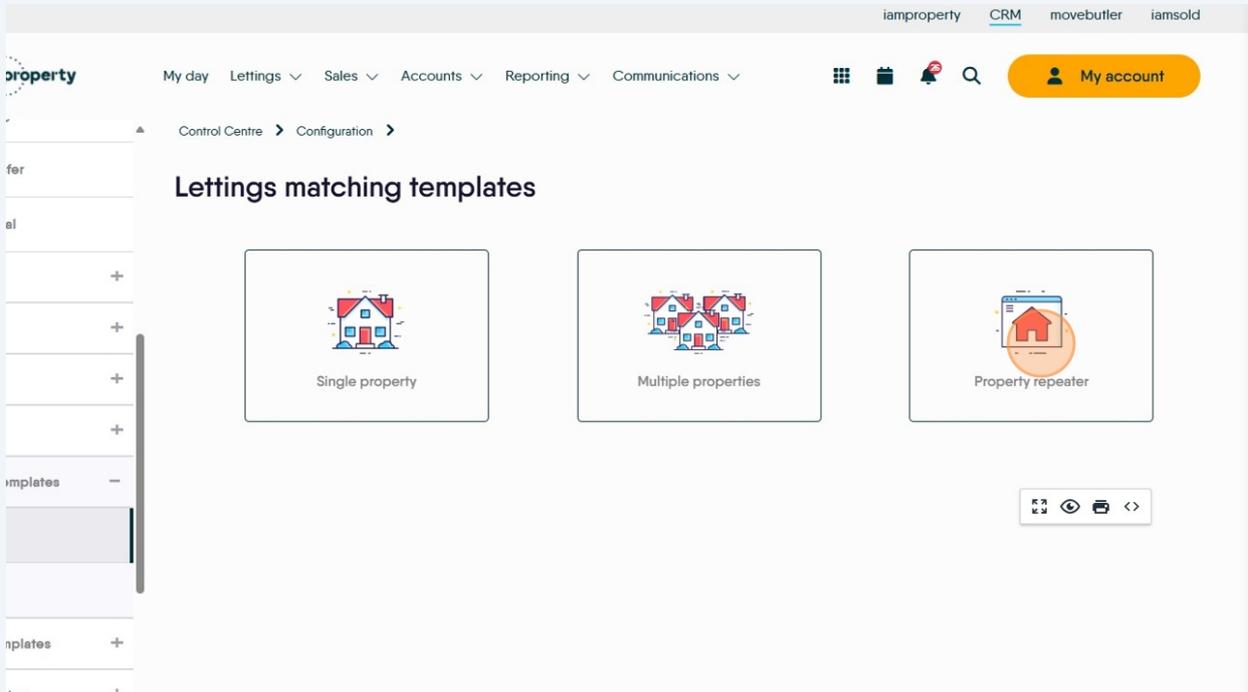
The process from here is the same as that for creating a single property matching template, however you need to remember to add the 'Property Repeater' tag.



## Property Repeater

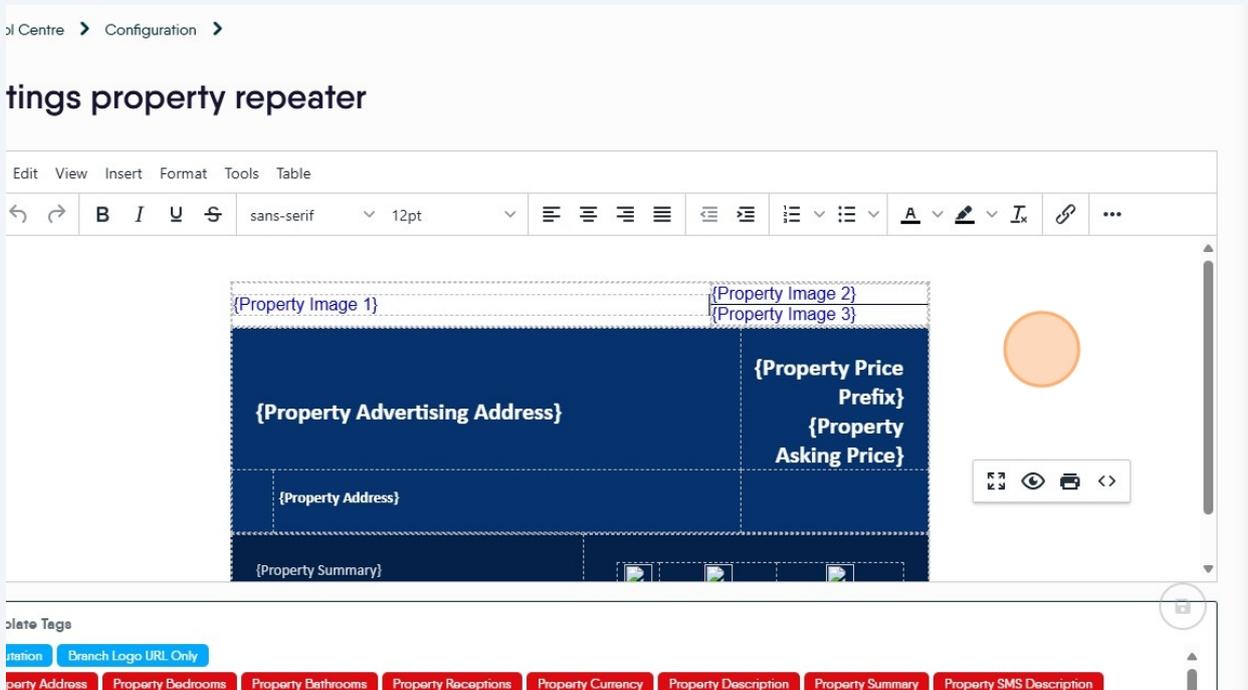
23

This is the template that brings in all the data for the multiple properties and is linked to the Multiple Properties template via the 'Property Repeater' tag. Again, the process for creating this is the same as other templates.



24

As with the other templates this can be a simple text message, or include images.



25

The templates can be created using tables and HTML as shown above, this allows a more visually appealing template if required and the ability to set the layout to suit your company style. There are some templates within CRM that can be used and edited or you can build your own.