

Updating an Email Template in CRM



This guide provides a straightforward process for updating any email template in the CRM system. The example we use is an 'Offer made' template ensuring that users can efficiently communicate offers to property vendors.

By following the steps outlined, users can personalise their messages, enhancing professionalism and clarity in their communications. This resource is essential for real estate professionals looking to streamline their workflow and maintain effective client relations.

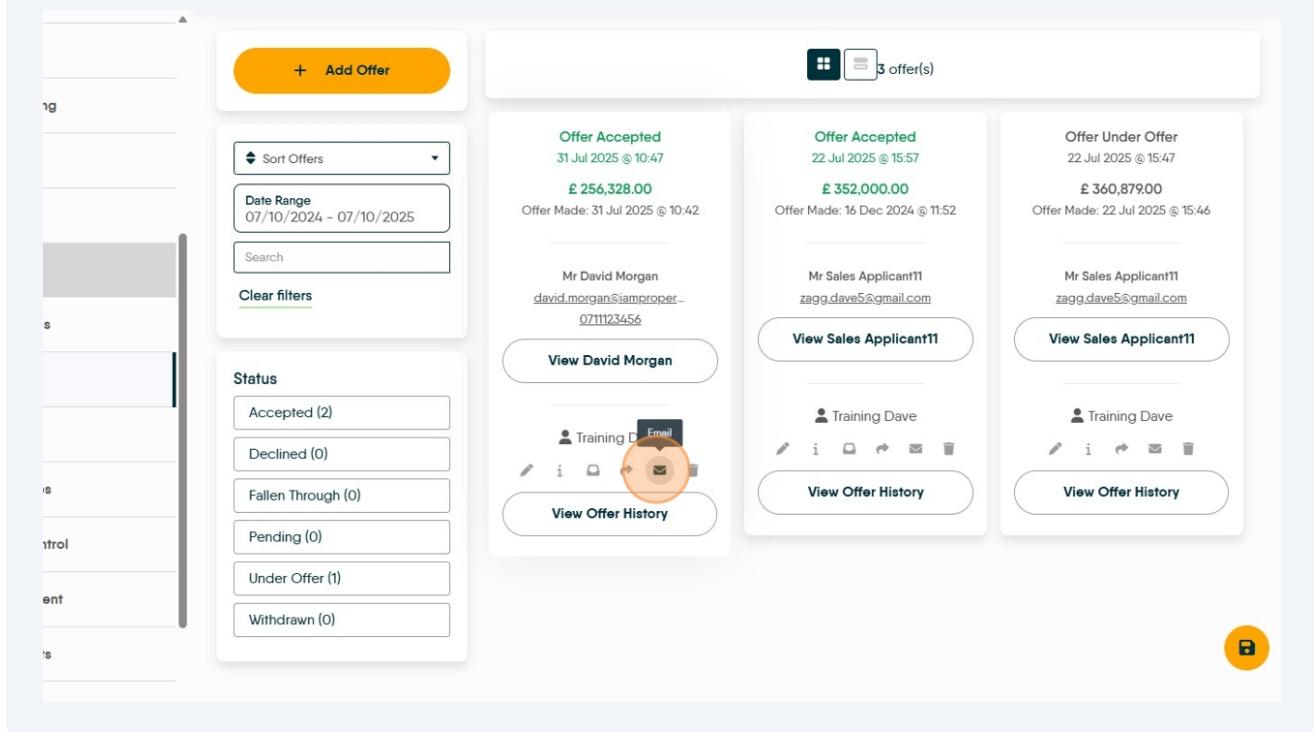


For this example we are using the 'Offer Made' template accessed from a sales property offer, however any email (or SMS) template can be edited in the same way.

1 Navigate to the email option.

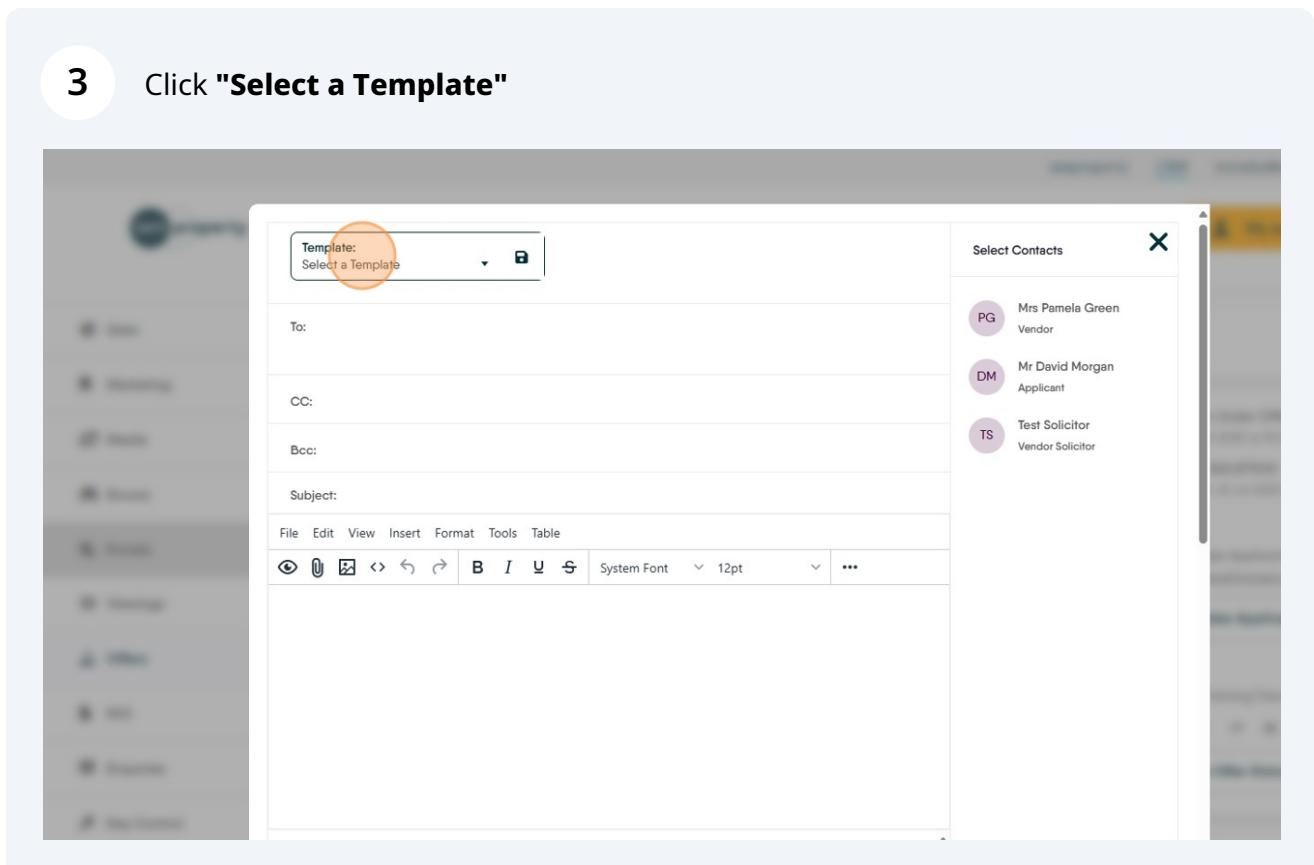
The screenshot shows the 'Offers' section of the CRM. The sidebar on the left has tabs for Stats, Marketing, Media, Rooms, Portals, Viewings, Offers (which is selected), NOI, Enquiries, Key Control, and Sub-Agent. The main area shows a list of offers with columns for Status, Date, Value, and Contact information. The first offer is 'Offer Accepted' on 31 Jul 2025 at 10:47 for £256,328.00, made by Mr David Morgan (david.morgan@iamproper...). The second offer is 'Offer Accepted' on 22 Jul 2025 at 15:57 for £352,000.00, made by Mr Sales Applicant11 (zagd.dave5@gmail.com). The third offer is 'Offer Under Offer' on 22 Jul 2025 at 15:46 for £360,879.00, made by Mr Sales Applicant11 (zagd.dave5@gmail.com). Each offer card has a 'View [Offerer Name]' button and a 'View Offer History' button.

2 Click here.



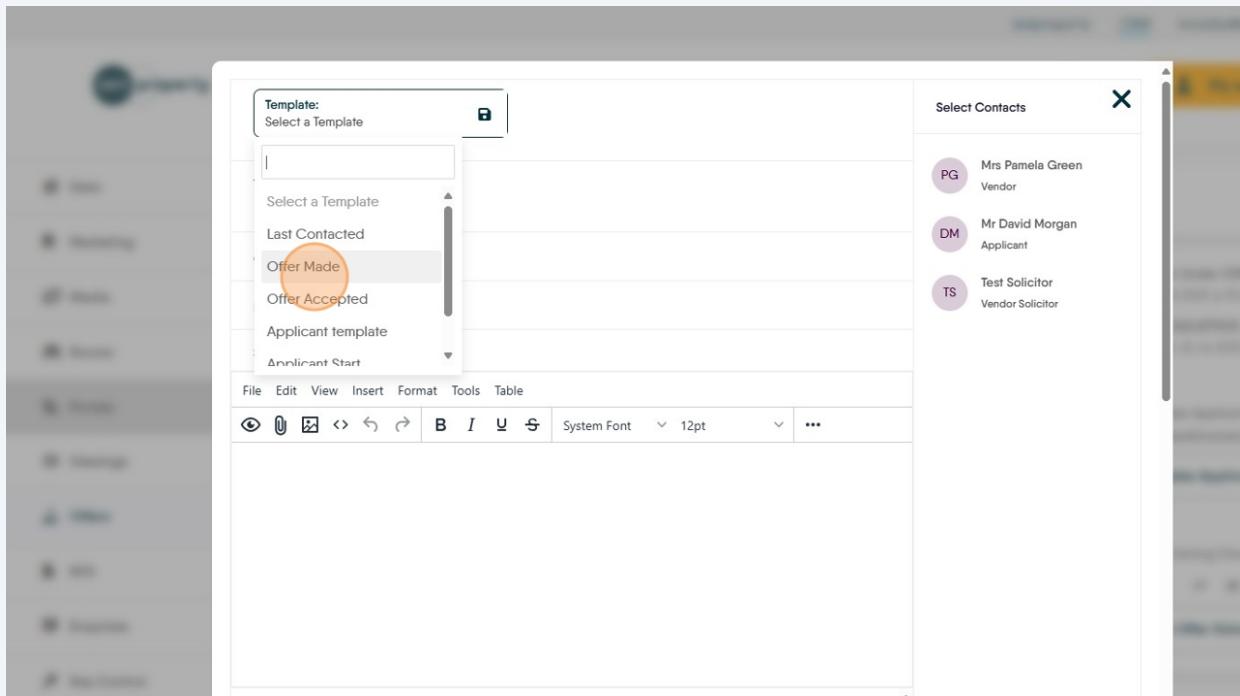
The screenshot shows a software interface for managing offers. On the left, there is a sidebar with a vertical scroll bar. In the center, there is a search and filter section with a yellow 'Add Offer' button. On the right, there is a list of three offers. Each offer card includes a status, amount, date, and a 'View' button. Below each card is a row of icons for editing, viewing, and deleting. The first offer's 'View Offer History' button is highlighted with an orange circle. A yellow circular icon with a 'B' is located in the bottom right corner of the main content area.

3 Click "Select a Template"

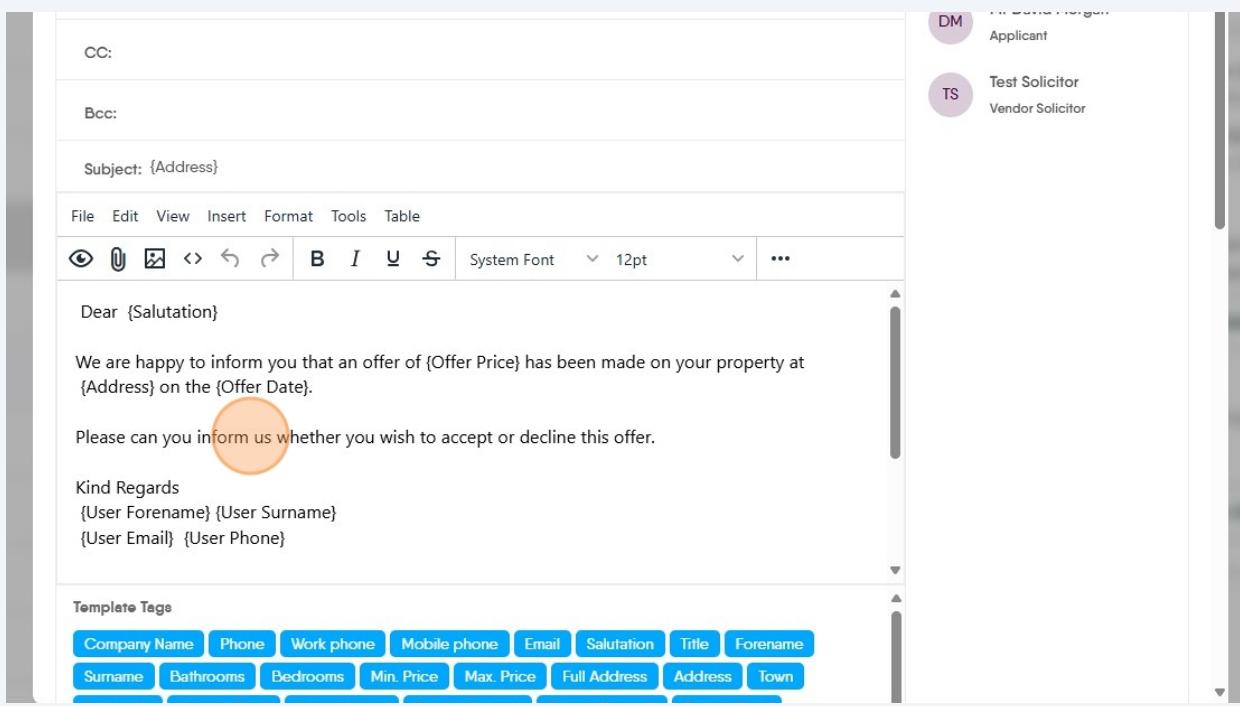


The screenshot shows a dialog box for selecting a template. At the top, there is a dropdown menu labeled 'Template: Select a Template' with an orange circle around it. Below the dropdown are fields for 'To:', 'CC:', 'Bcc:', and 'Subject:'. Underneath these fields is a toolbar with various icons and a font size dropdown. To the right of the main area is a sidebar titled 'Select Contacts' with three entries: 'Mrs Pamela Green Vendor' (PG), 'Mr David Morgan Applicant' (DM), and 'Test Solicitor Vendor Solicitor' (TS). A yellow circular icon with a 'B' is located in the bottom right corner of the dialog box.

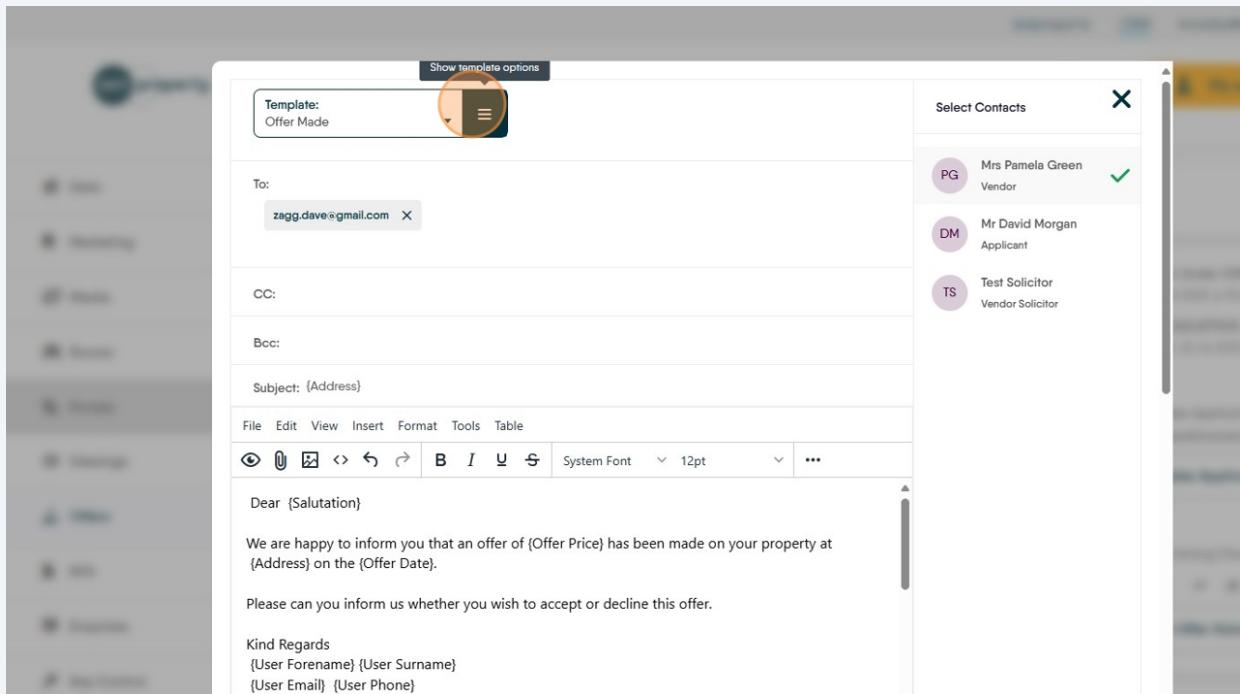
4 Click "the template you are using" in this case offer made.



5 Click and edit your template as needed.



6 Click here.



7 Click "**Update Template**" this will save and update the template replacing the previous version. If you want to keep the original version then select the "**Save as New Template**" option.

