

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 'iam property' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar lists various sections: Stats, Marketing, Media, Rooms, Portals, Viewings, Offers (selected), NOI, Enquiries, Key Control, and Sub-Agent. The main content area displays a list of offers. On the left, there are filters for 'Sort Offers', 'Date Range' (07/10/2024 - 07/10/2025), 'Search', and 'Clear filters'. Below these are status filters: Accepted (2), Declined (0), Fallen Through (0), Pending (0), Under Offer (1), and Withdrawn (0). The main area shows three offer cards. Each card displays the offer status (e.g., 'Offer Accepted'), date and time, amount (e.g., '£ 256,328.00'), and the offer maker's details (e.g., 'Mr David Morgan'). Each card also has a 'View Sales Applicant' button and a 'View Offer History' button. The interface is clean and modern, with a light blue and white color scheme.

2 Click here.

+ Add Offer

3 offer(s)

Sort Offers

Date Range
07/10/2024 - 07/10/2025

Search

Clear filters

Status

Accepted (2)

Declined (0)

Fallen Through (0)

Pending (0)

Under Offer (1)

Withdrawn (0)

Offer Accepted
31 Jul 2025 @ 10:47
£ 256,328.00
Offer Made: 31 Jul 2025 @ 10:42

Mr David Morgan
david.morgan@iamproper...
0711123456

View David Morgan

Training Dave

Email

View Offer History

Offer Accepted
22 Jul 2025 @ 15:57
£ 352,000.00
Offer Made: 16 Dec 2024 @ 11:52

Mr Sales Applicant11
zaggg.dave5@gmail.com

View Sales Applicant11

Training Dave

View Offer History

Offer Under Offer
22 Jul 2025 @ 15:47
£ 360,879.00
Offer Made: 22 Jul 2025 @ 15:46

Mr Sales Applicant11
zaggg.dave5@gmail.com

View Sales Applicant11

Training Dave

View Offer History

3 Click "Select a Template"

Template: Select a Template

To:

CC:

Bcc:

Subject:

File Edit View Insert Format Tools Table

Undo Redo Bold Italic Underline Text Color System Font 12pt

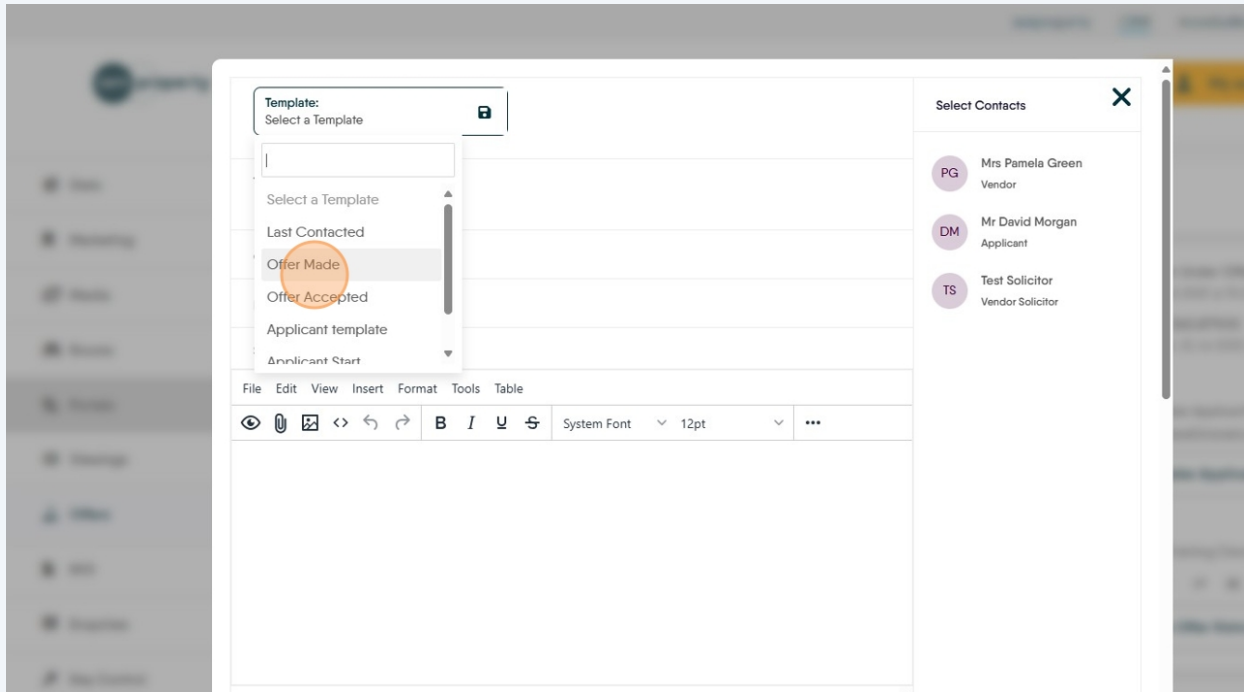
Select Contacts

PG Mrs Pamela Green Vendor

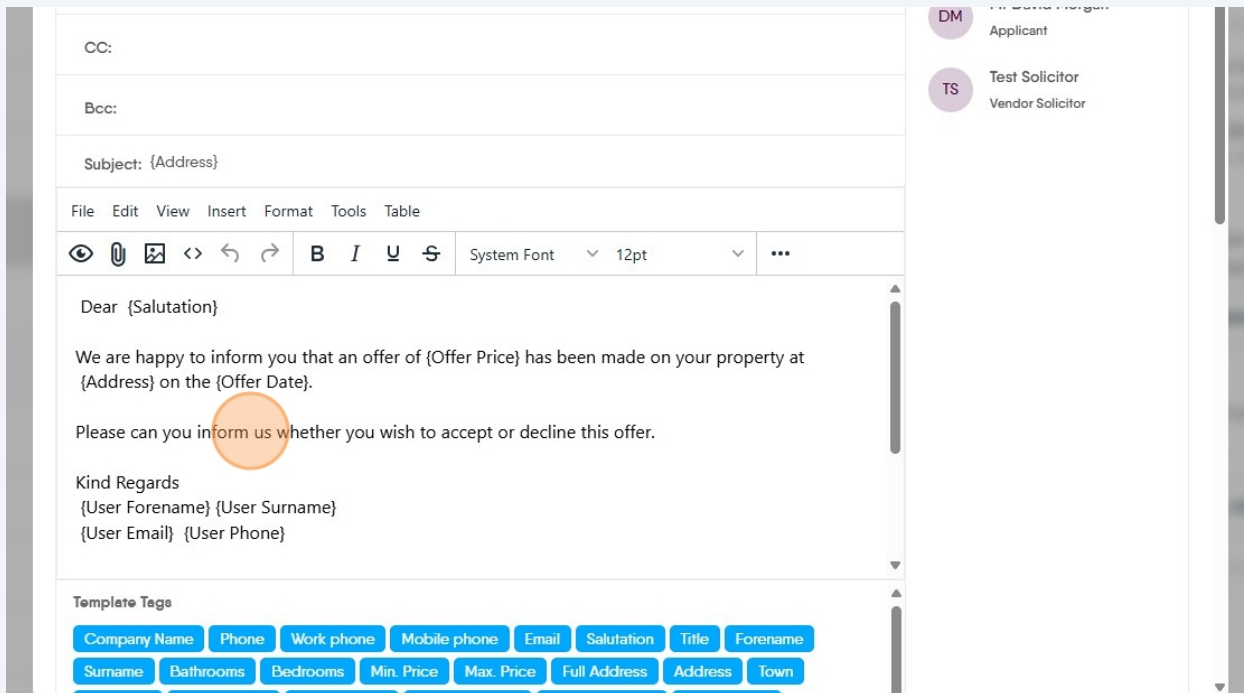
DM Mr David Morgan Applicant

TS Test Solicitor Vendor Solicitor

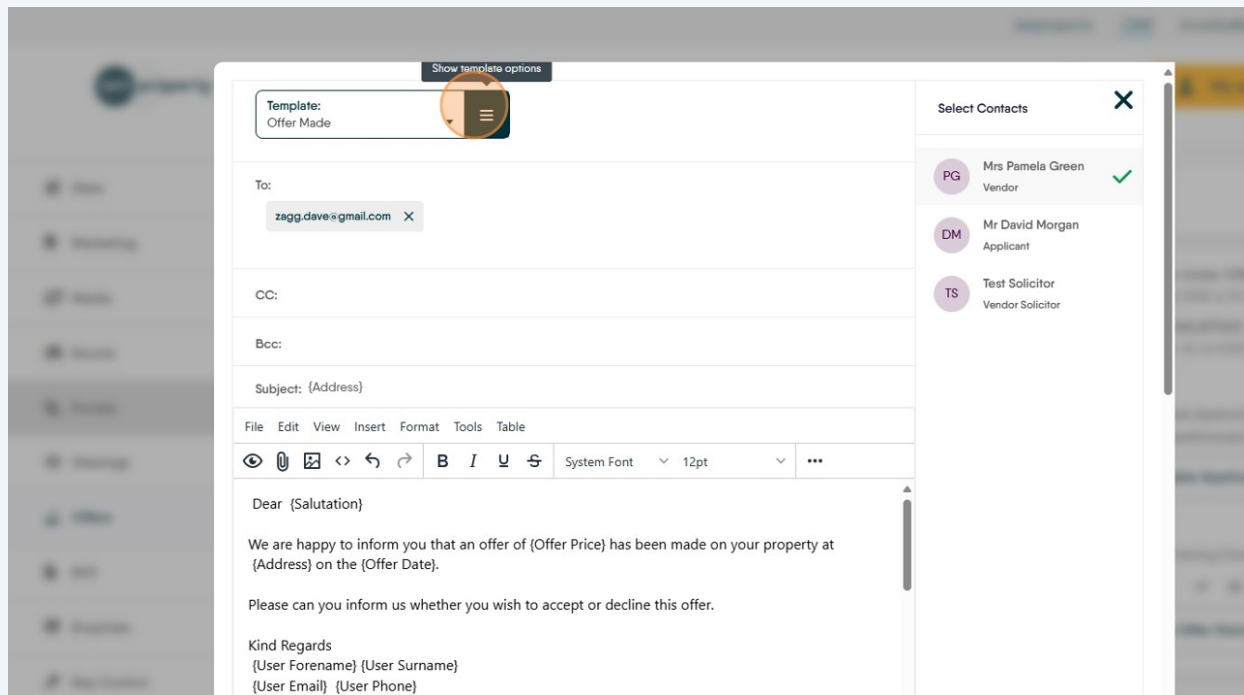
- 4 Click **"the template you are using"** in this case offer made.



- 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.

