

Using 'Mass MOS' option to send a Memorandum of Sale Document



This guide provides a straightforward process for using the 'Mass MOS' option to efficiently send a Memorandum of Sale document. Mass MOS allows all the required documents to be sent to all recipients in the progression.

It simplifies the steps needed to navigate the CRM platform, attach necessary files, and communicate effectively with clients.



Alert! For this process to work correctly the Solicitor details for both parties need to be added to CRM

1

Navigate to the offers screen in the property record you are sending the MOS for.

2 Click here.

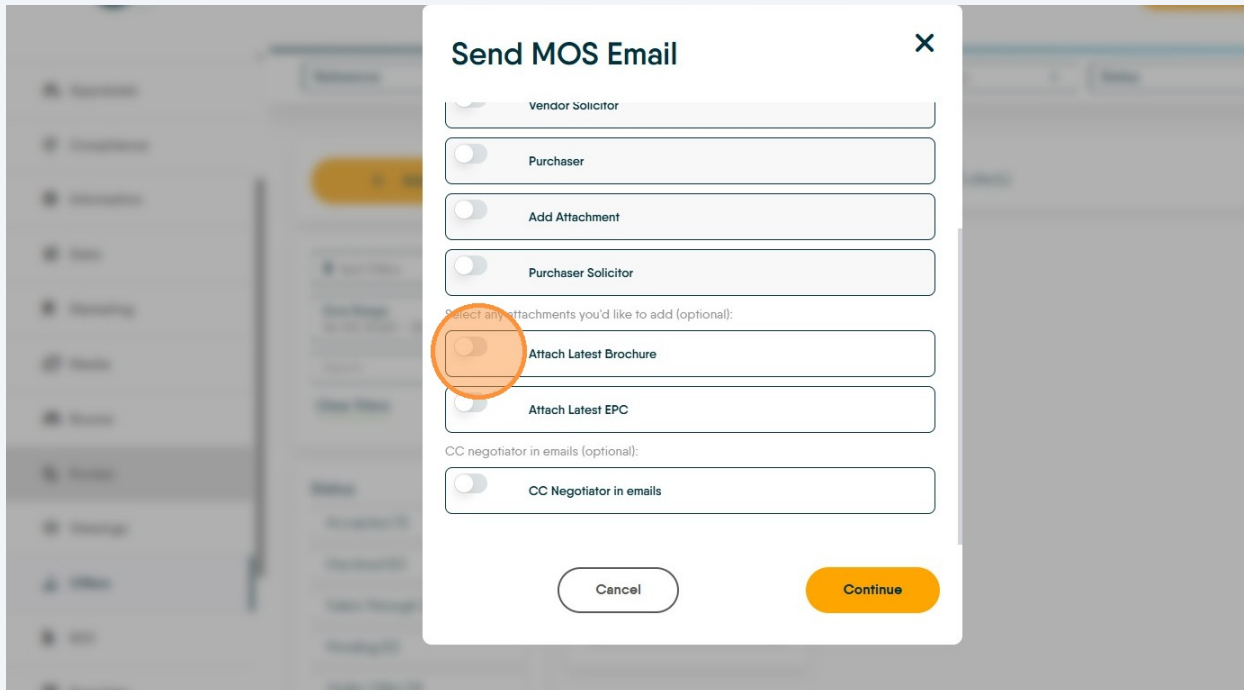
The screenshot shows a web application interface for managing offers. On the left is a sidebar with navigation links: Appraisals, Compliance, Information, Assets, Marketing, Media, Forms, Portals, Drawings, and Offers (highlighted). The main area has a header with filters: Reference, Negotiator (Training Dave), Branch (Morgan & Co), and Status. Below the header is a '+ Add Offer' button and a '1 offer(s)' indicator. A filter panel on the left includes 'Sort Offers', 'Date Range' (16/01/2025 - 16/01/2026), a search bar, and a 'Clear filters' link. A 'Status' section lists: Accepted (1), Declined (0), Fallen Through (0), Pending (0), Under Offer (0), and Withdrawn (0). The main content area displays an 'Offer Accepted' card for Miss Fern Harmon, dated 16 Jan 2026 @ 16:04, with a value of £ 150000.00. The card includes contact details and a 'View Fern Harmon' button. A 'Send MOS Email' button is circled in orange, with a tooltip showing 'Send MOS Email' and 'Email'.

3 In the 'Send MOS Email' screen click here.

The screenshot shows a 'Send MOS Email' modal window. It has a title bar with a close button (X). The main content area has a heading 'Please select which records you'd like to send an MOS Letter via email to:' followed by a list of toggleable options: 'Select all records', 'Vendor', 'Vendor Solicitor', 'Purchaser', 'Add Attachment', and 'Purchaser Solicitor'. Below this is a section 'Select any attachments you'd like to add (optional):' with a toggleable option 'Attach Latest Brochure'. At the bottom are 'Cancel' and 'Continue' buttons. The 'Select all records' toggle is circled in orange.

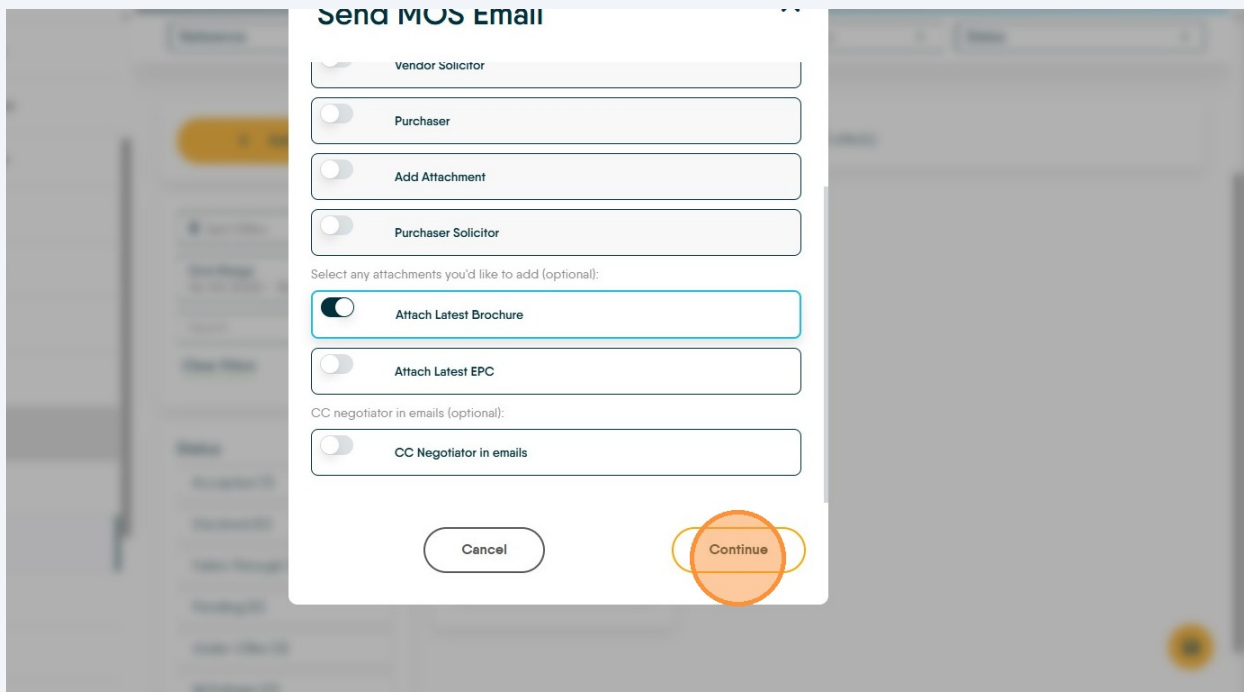
4

If you want to attach the property brochure and the EPC select the appropriate toggles. The brochure and EPC need to be saved into the Documents folder for the property and saved as either brochure or EPC for this to work correctly.

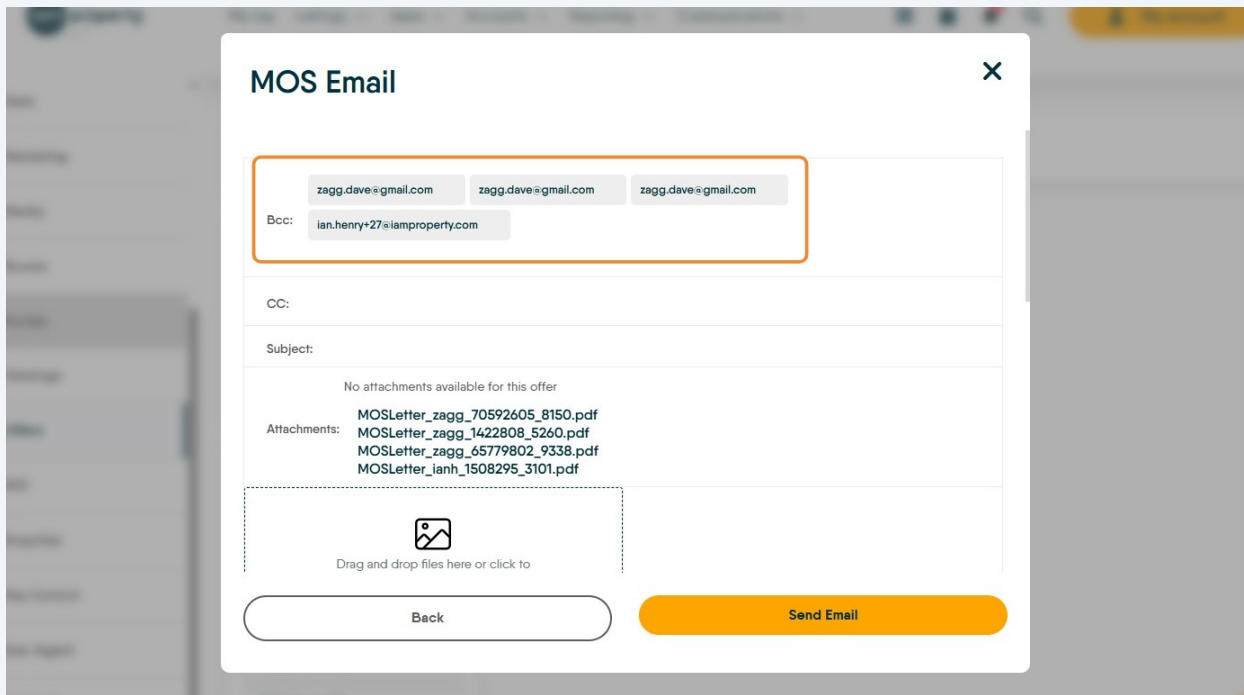


5

Click "Continue"



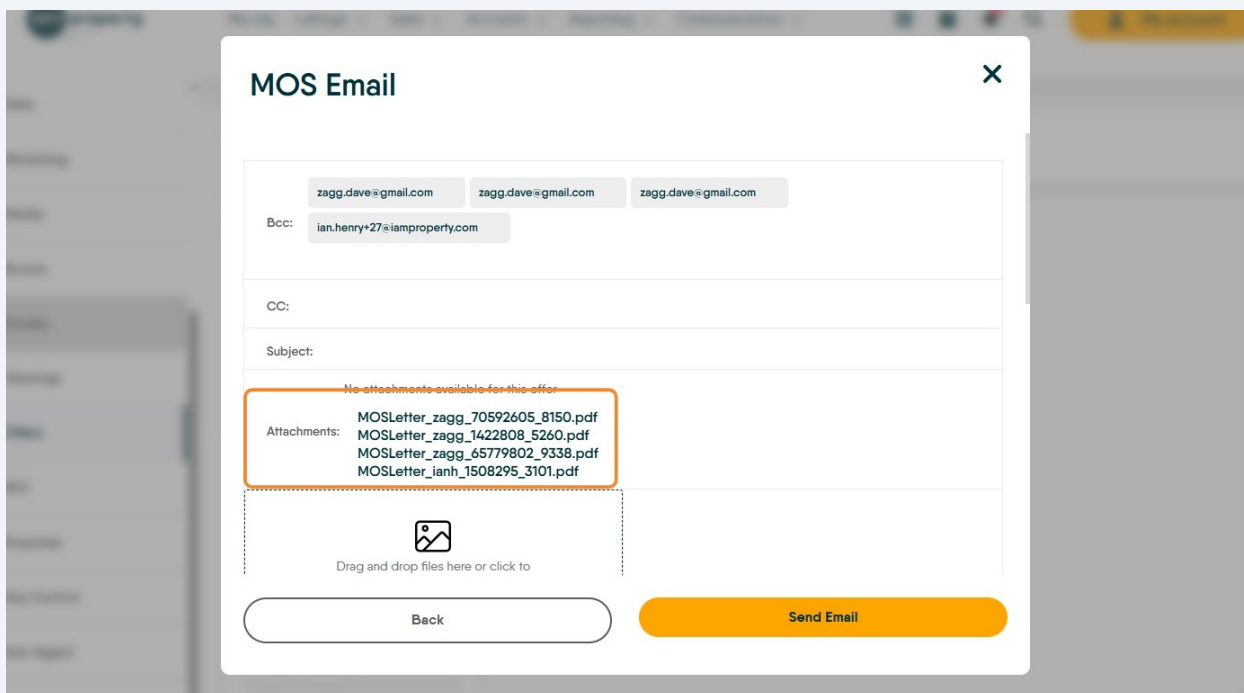
- 6 The email addresses for all the recipients will show in the email.



The screenshot shows a web form titled "MOS Email" with a close button (X) in the top right corner. The form has several sections: a "To:" field with three email addresses (zagg.dave@gmail.com), a "Bcc:" field with one email address (ian.henry27@iamproperty.com), a "CC:" field, and a "Subject:" field. Below these fields, there is a message "No attachments available for this offer" and a list of four PDF attachments: MOSLetter_zagg_70592605_8150.pdf, MOSLetter_zagg_1422808_5260.pdf, MOSLetter_zagg_65779802_9338.pdf, and MOSLetter_ianh_1508295_3101.pdf. At the bottom of the form, there is a dashed box with a file icon and the text "Drag and drop files here or click to". Below this box are two buttons: "Back" and "Send Email".

- 7 The emails will show attached. These can be selected and opened if required.

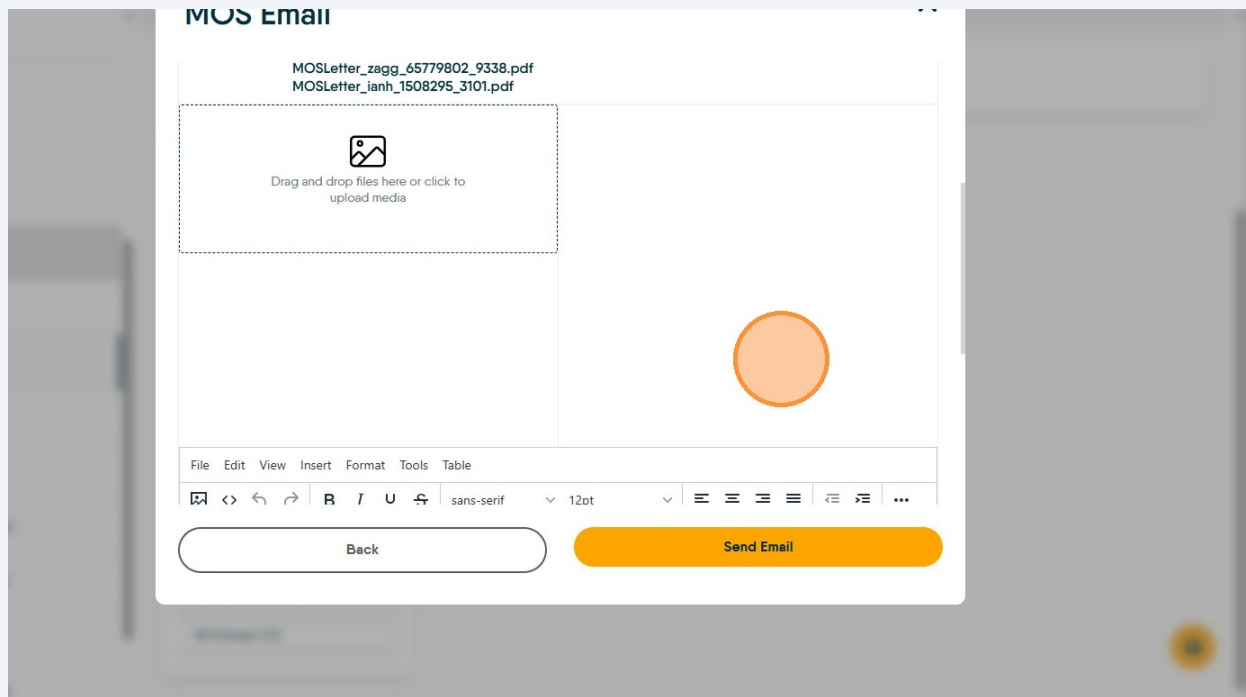
Everyone receives their own email with their attachment, NOT all 4.



This screenshot is identical to the one above, showing the "MOS Email" form. It displays the same recipient information, subject field, and a list of four PDF attachments. The form includes a "Back" button and a "Send Email" button at the bottom.

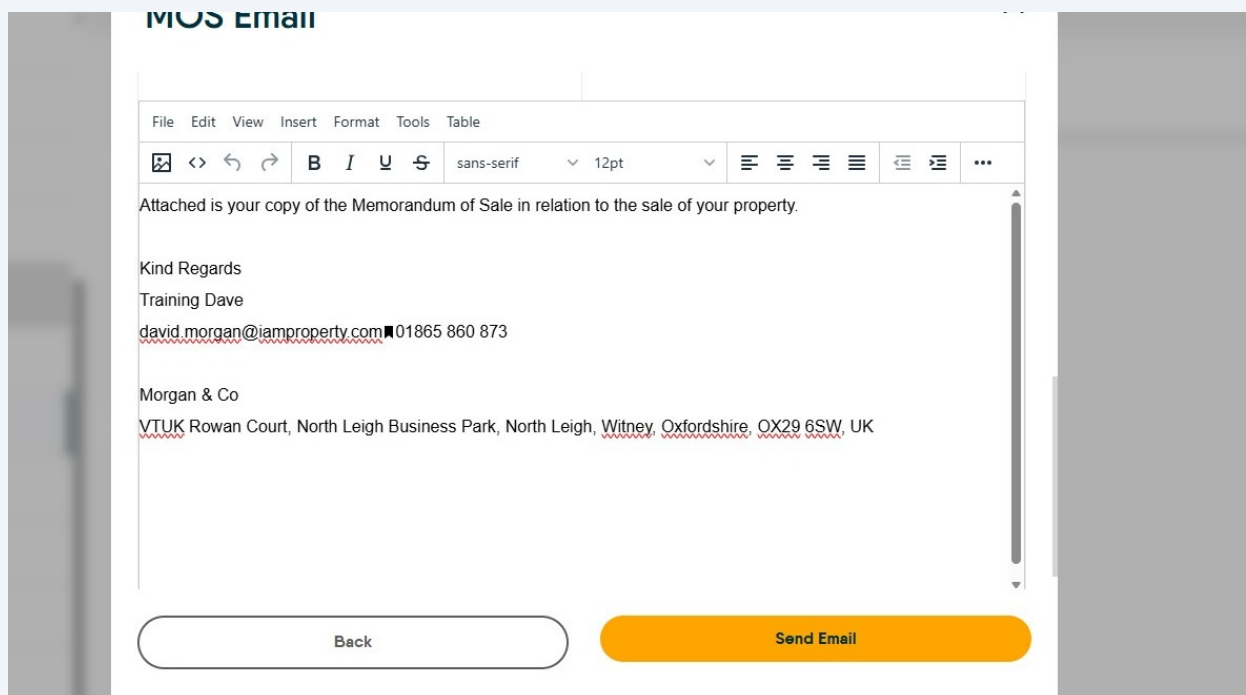
8

You can click to "Drag and drop files here or click to upload media" if you want to add additional documents to the email.



9

Your pre set email for the MOS message will show at the bottom of the screen. This is set in the CRM Configuration.



10

Click "Send Email" the MOS will be sent to all recipients at the same time. Each person gets their own individual message and does not see the MOS documents of the others in the chain.

