

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.

The screenshot displays the 'iam property' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. The left sidebar menu lists various sections: Appraisals, Compliance, Information, Stats, Marketing, Media, Rooms, Portals, Viewings, **Offers**, and NOI. The main content area features a search bar with filters for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status'. A prominent orange '+ Add Offer' button is visible. Below the filters, there is a 'Sort Offers' dropdown, a 'Date Range' filter set to '16/01/2025 - 16/01/2026', a search input, and a 'Clear filters' link. A 'Status' section shows counts for 'Accepted (1)', 'Declined (0)', 'Fallen Through (0)', and 'Pending (0)'. The main offer card displays 'Offer Accepted' on '16 Jan 2026 @ 16:04' for a value of '£ 150000.00', with 'Offer Made: 16 Jan 2026 @ 16:03'. The offer is for 'Miss Fern Harmon' with contact details 'zagg.clave@gmail.com' and '07711445566'. Action buttons include 'View Fern Harmon', 'Send MOS Email', and 'View Offer History'.

2 Click here.

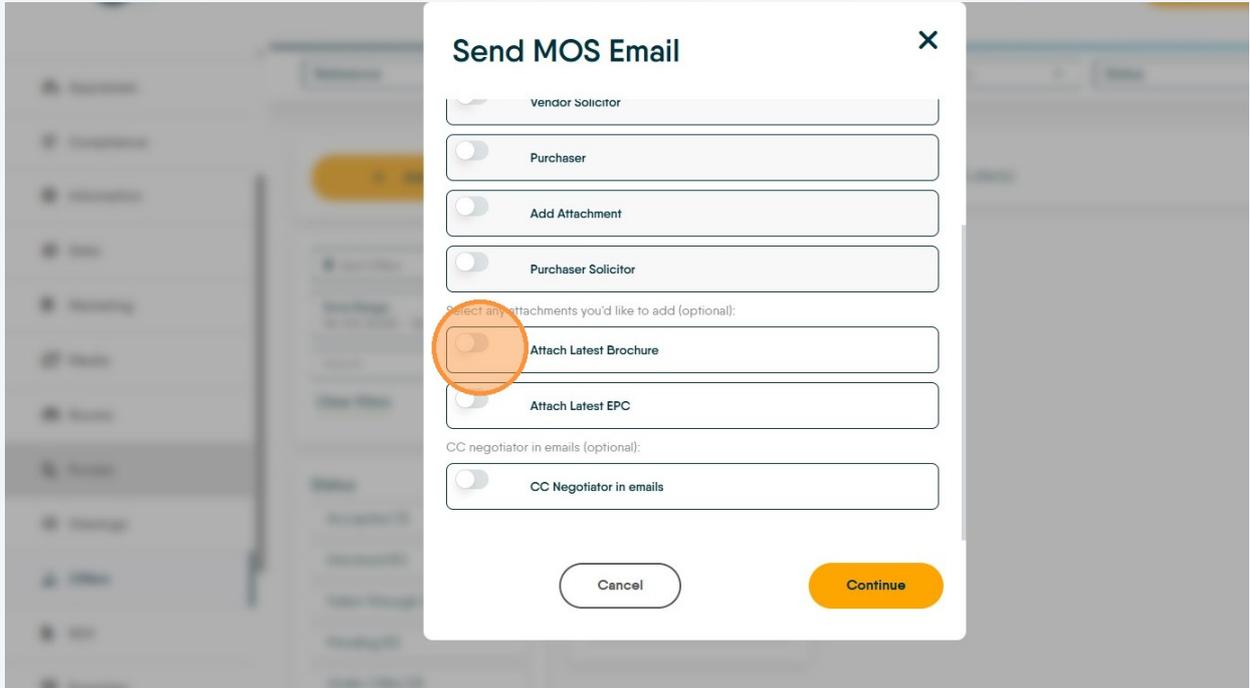
The screenshot shows a software interface with a sidebar on the left containing menu items like 'Appraisals', 'Compliance', 'Information', 'Stats', 'Marketing', 'Media', 'Forms', 'Portals', 'Swings', 'Offers', 'DI', and 'Inquiries'. The main area has a top navigation bar with 'Reference', 'Negotiator Training Dave', 'Branch Morgan & Co', and 'Status'. Below this is a '+ Add Offer' button and a 'Sort Offers' dropdown. A 'Date Range' filter is set to '16/01/2025 - 16/01/2026'. A 'Status' section on the left 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' with a value of '£ 150000.00' and a date of '16 Jan 2026 @ 16:04'. The card includes contact information: 'Miss Fern Harmon', 'zagg.dave@gmail.com', and '0771445566'. A 'Send MOS Email' tooltip is visible over the card, with an orange circle highlighting the 'Send MOS Email' button. Other buttons on the card include 'View Fern Harmon' and 'View Offer History'.

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

The screenshot shows a 'Send MOS Email' dialog box with a close button (X) in the top right. The dialog contains the instruction: 'Please select which records you'd like to send an MOS Letter via email to:'. Below this are several toggle switches: 'Select all records' (highlighted with an orange circle), 'Vendor', 'Vendor Solicitor', 'Purchaser', 'Add Attachment', and 'Purchaser Solicitor'. At the bottom, there is a section for optional attachments: 'Select any attachments you'd like to add (optional):' with a toggle for 'Attach Latest Brochure'. At the very bottom are 'Cancel' and 'Continue' buttons.

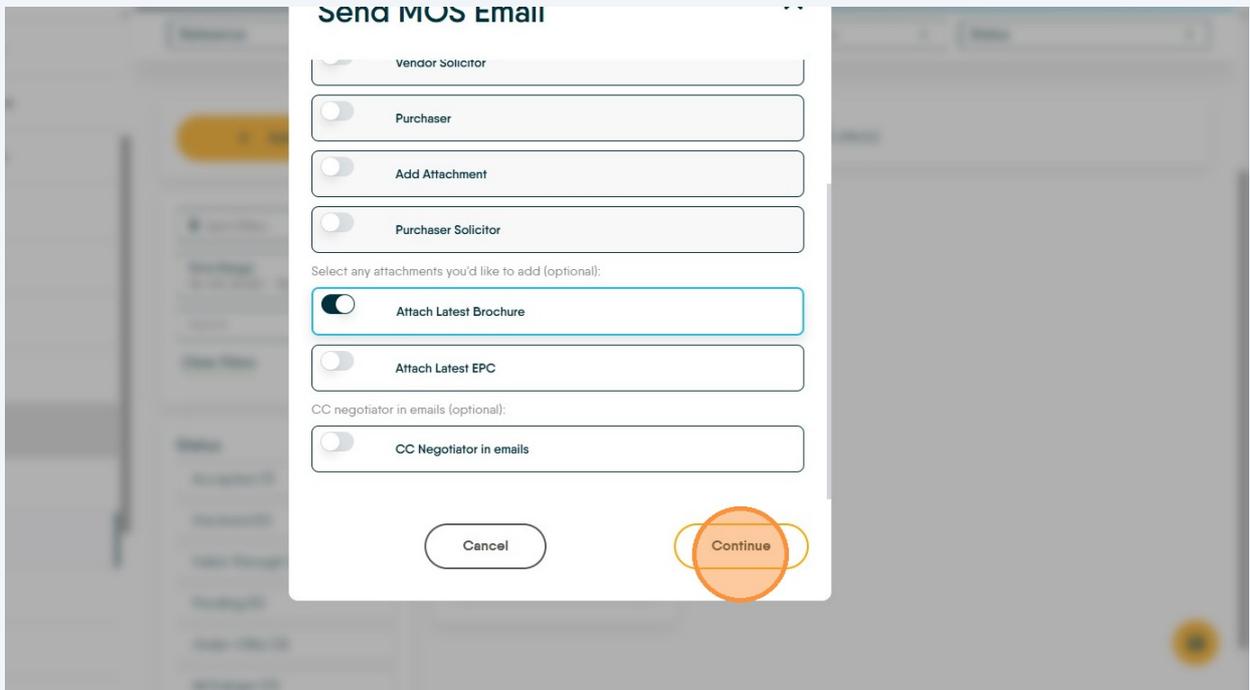
4

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.

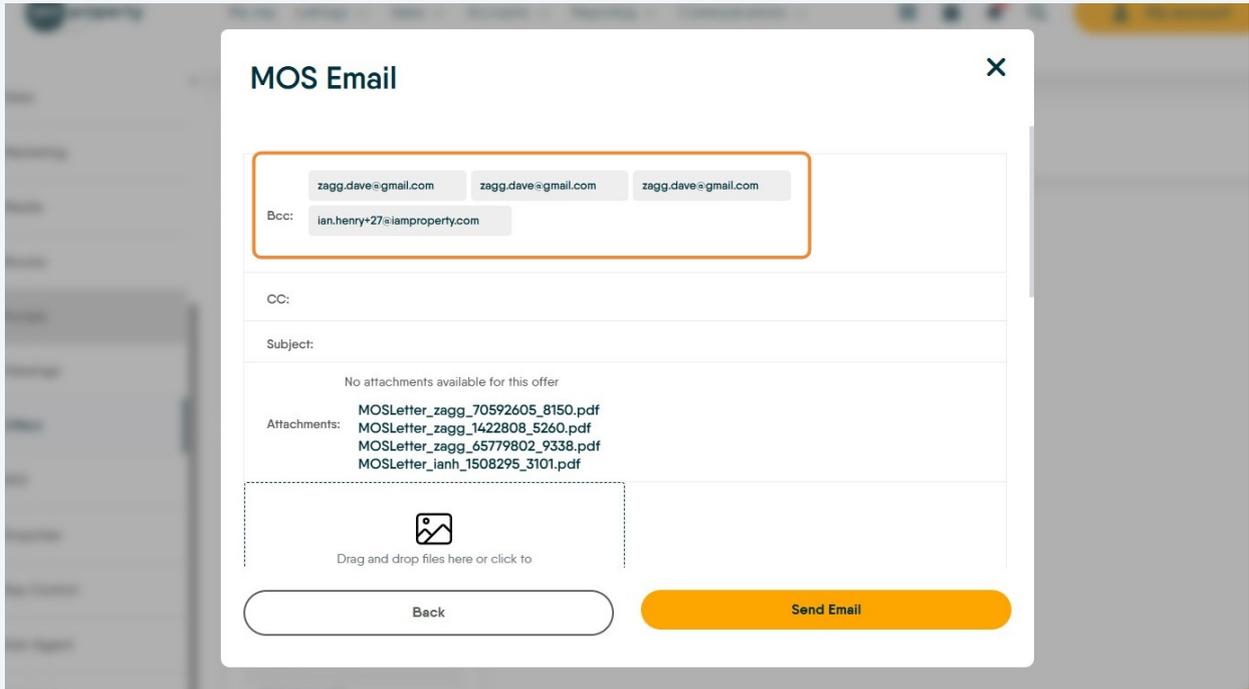


5

Click "Continue"

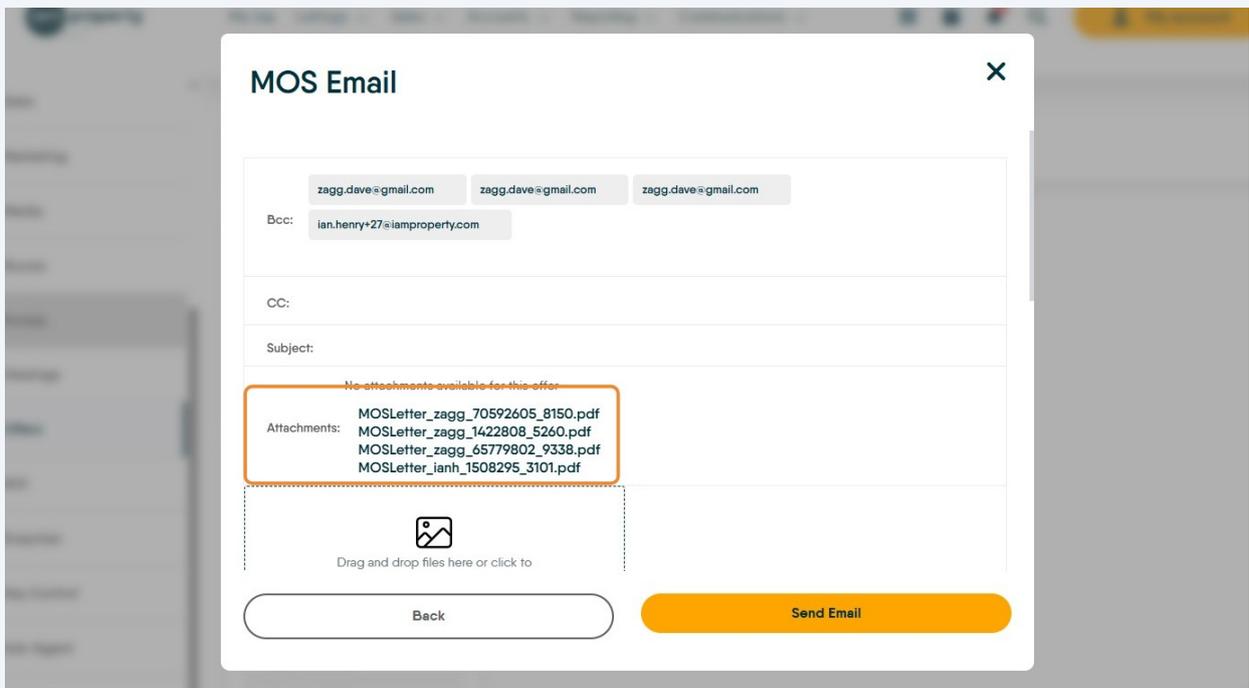


6 The email addresses for all the recipients will show in the email.



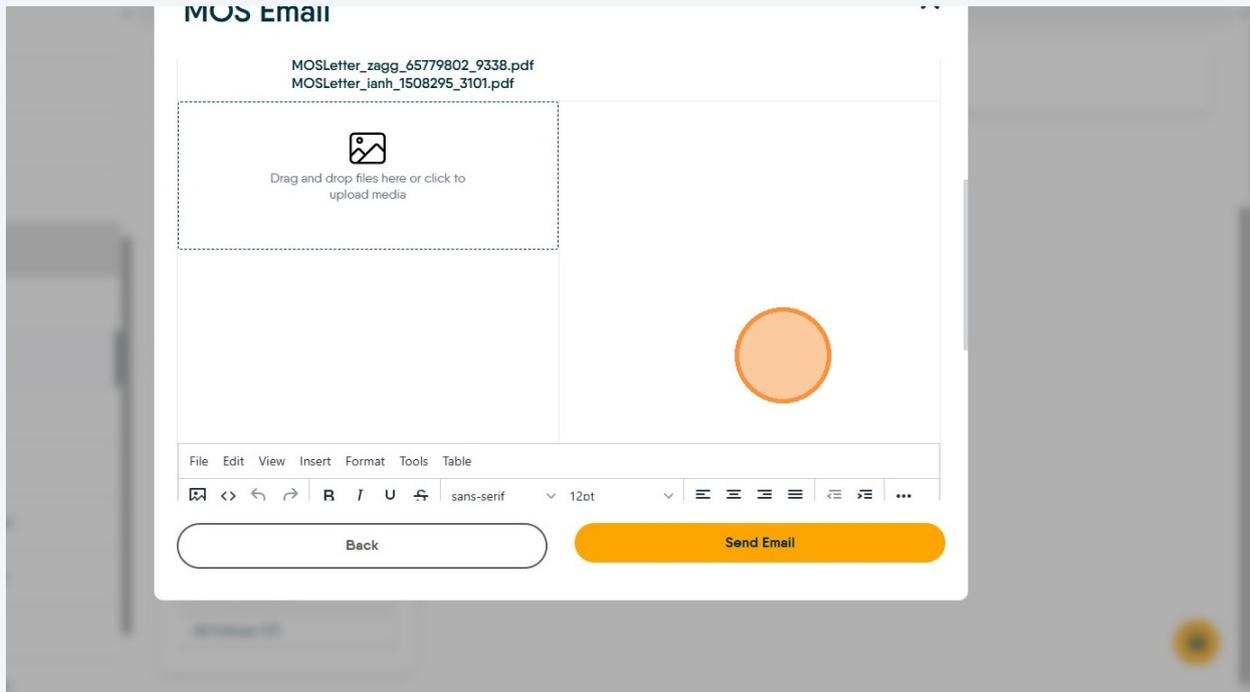
7 The emails will show attached. These can be selected and opened if required.

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



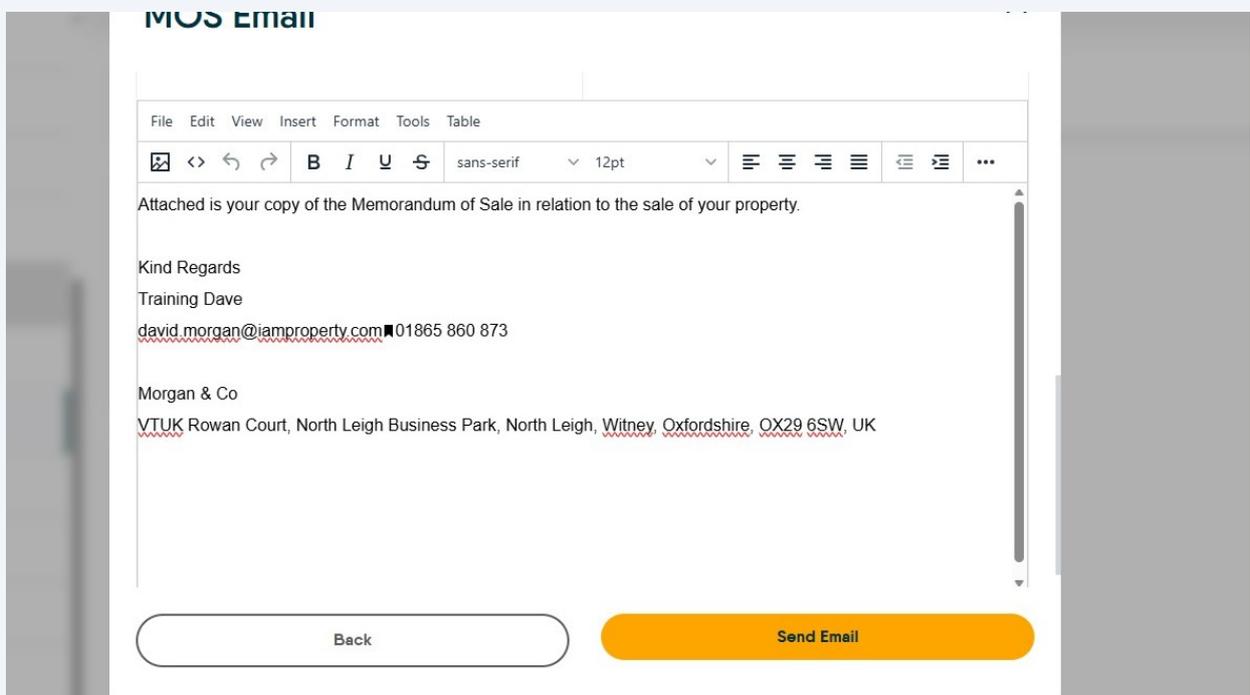
8

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.

