

# Generating and Sending a Sales Invoice



Learn the process of creating a sales invoice for a specific property record within the CRM. This guide ensures accurate billing by walking you through selecting the correct template, merging client data, and sending the document via email.

## 1 Navigate to the property record

The screenshot displays the 'iam property' CRM interface. On the left is a navigation sidebar with categories: Stats, Marketing, Media, Rooms, Portals, Viewings, Offers, NOI, Enquiries, Key Control, and Sub-Agent. The main content area features a dark blue header with the property address '69 Manstone Avenue, Sidmouth, EX10 9TG' and a default price of '£ 355,000'. It also shows '2' bedrooms and '2' bathrooms. A 'Lead vendor: Mr Chris Mouse' is listed with a 'View Vendors' button. Action buttons include 'Refer Property for Auction', 'Appraisal', and a 'WARNING' icon. Below the header are filters for 'Reference', 'Negotiator', 'Branch' (Wilton Branch), and 'Status'. The main content is divided into three sections: 'PROPERTY PICTURES' with an 'Upload' button and a photo of a house; 'Property Address' with 'Postcode' (EX10 9TG) and 'Address' (69 Manstone Avenue, Sidmouth, Devon, EX10 9TG, UK) fields, and an 'Edit Address' button; and 'Price/Instructed Date' with a 'Currency' dropdown set to 'GBP'.

## 2 Click "Offers"

The screenshot shows a software interface with a sidebar on the left containing menu items: Media, Rooms, Portals, Viewings, Offers (highlighted with an orange circle), NOI, Enquiries, Key Control, and Sub-Agent. The main content area features a dark teal header with a 'Lead vendor: Mr Chris Mouse' and a 'View Vendors' button. Below this are filters for 'Reference', 'Negotiator', and 'Branch'. The main section is titled 'PROPERTY PICTURES' and includes an 'Upload' button and a large image of a house. To the right, there are partial labels for 'Proper', 'Posto EX10', 'Addre 69 M', and 'Price/l'.

## 3 On the Accepted Offer click the Generate Letter option

The screenshot displays a list of offers with various filters. On the left, there is a sidebar with a search bar and a 'Sort Offers' dropdown. Below it are filters for 'Date Range' (21/04/2025 - 21/04/2026), a search box, and 'Clear filters'. A 'Status' section includes buttons for Accepted (1), Declined (0), Fallen Through (0), Pending (1), Under Offer (0), and Withdrawn (0). The main area shows two offer cards: 'Offer Accepted' (21 Apr 2026 @ 15:21, £240000.00, Offer Made: 01 May 2025 @ 13:08) and 'Offer Pending' (30 Apr 2025 @ 12:19, £354500.00, Offer Made: 30 Apr 2025 @ 12:18). Each card lists agent details and has a 'View' button. A 'Generate Letter' button is highlighted with an orange circle on the 'View Offer History' button of the 'Offer Accepted' card.

4 The drop down menu will show 'Sales Offer' Click "**Please select a letter**"

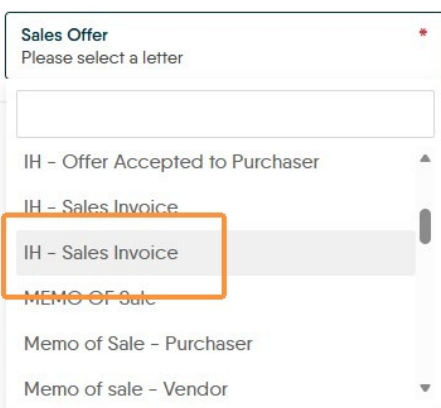
*If you have just updated the offer status and Sales Offer doesn't show, return to the property screen and repeat the previous steps for the sales offer option to show.*



A screenshot of a web form element. It consists of a rectangular box with a thin border. Inside the box, the text 'Sales Offer' is displayed in a dark font, with a small red asterisk to its right. Below this, the text 'Please select a letter' is shown in a lighter font. A small downward-pointing triangle is visible on the right side of the box, indicating it is a dropdown menu. An orange circle is drawn around the text 'Please select a letter'.

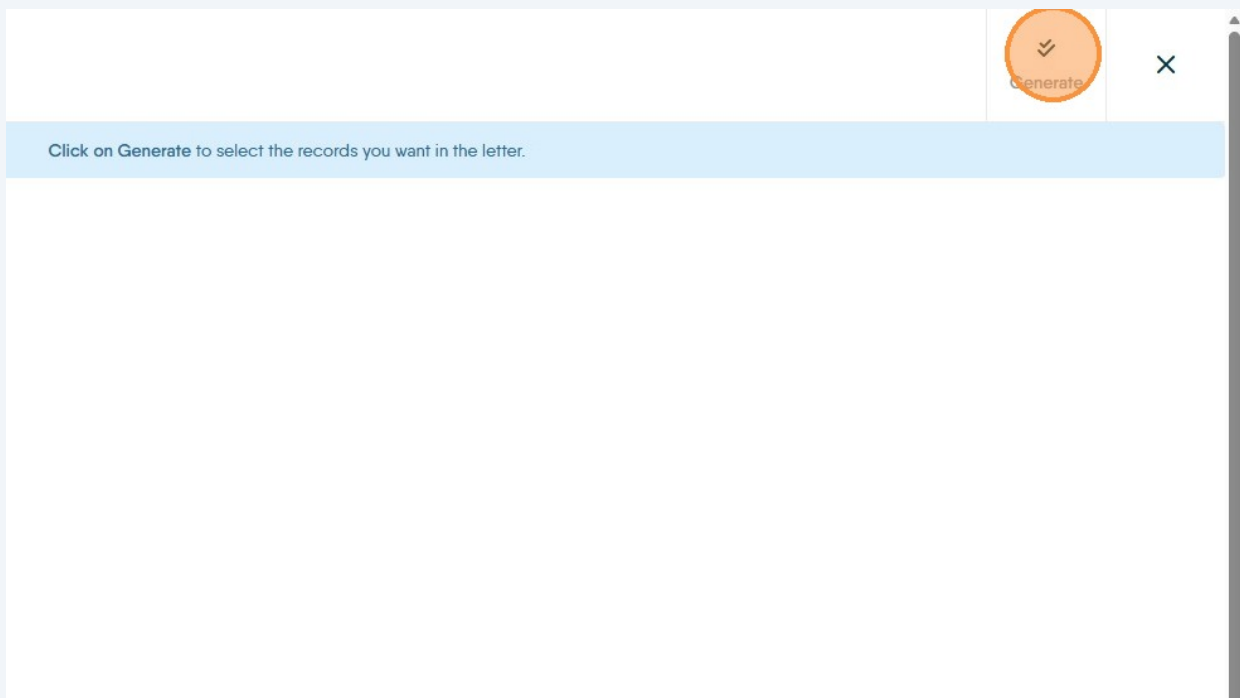
5 From the drop down menu search for and select the **Sales Invoice**.

Your sales invoice will have your naming and **will not be** IH - Sales Invoice



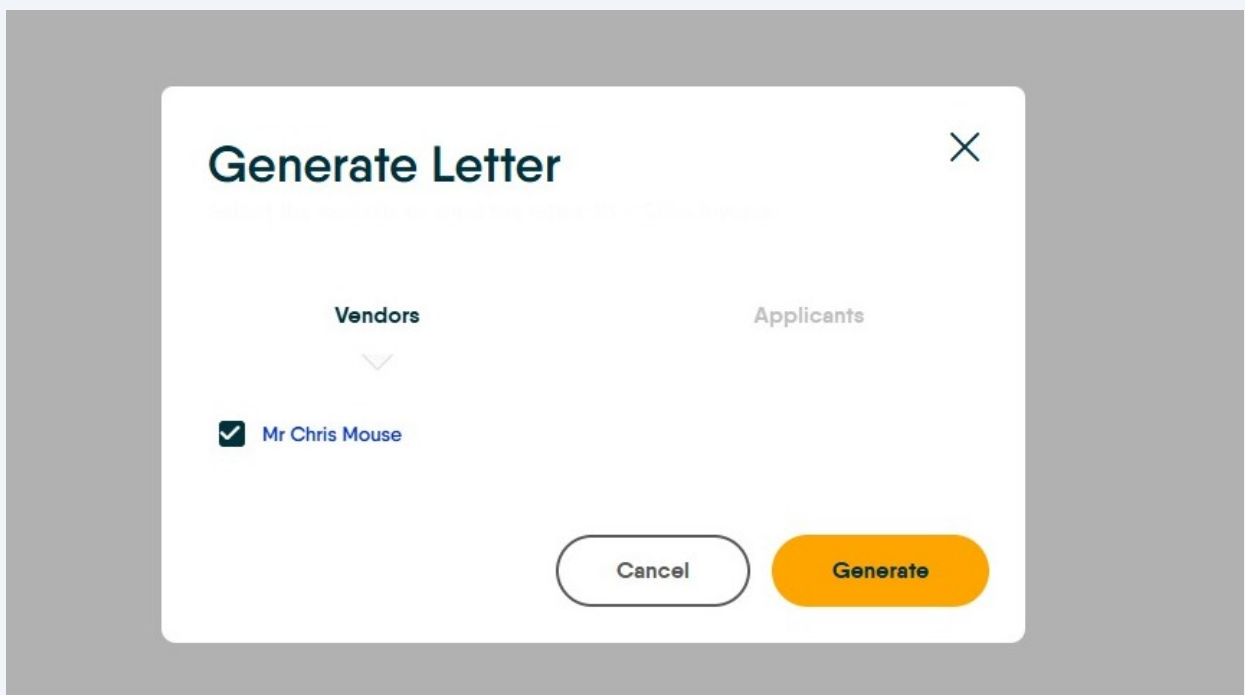
A screenshot of a web form element showing a dropdown menu. The menu is open, displaying a list of options. The top of the menu shows 'Sales Offer' with a red asterisk and 'Please select a letter'. Below this is a search input field. The list of options includes: 'IH - Offer Accepted to Purchaser', 'IH - Sales Invoice', 'IH - Sales Invoice' (highlighted with an orange box), 'MEMO OF Sale', 'Memo of Sale - Purchaser', and 'Memo of sale - Vendor'. A vertical scrollbar is visible on the right side of the list.

**6** Click **Generate**.

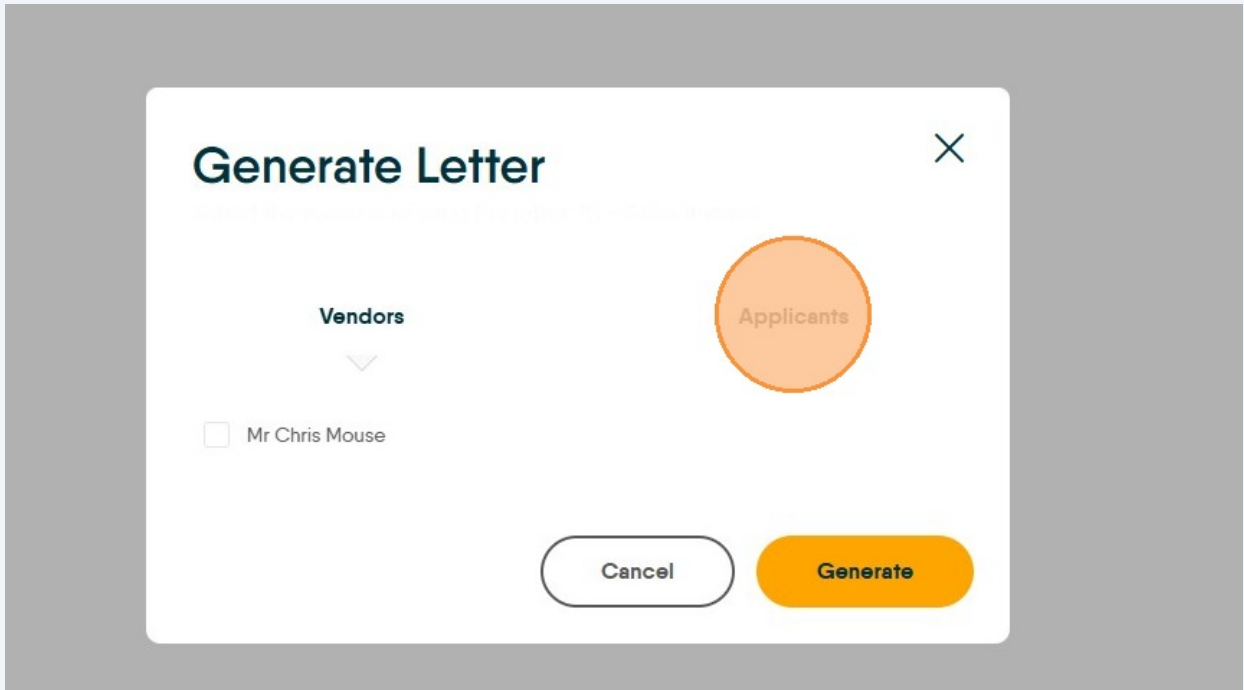


**7** You will see the Vendors details.

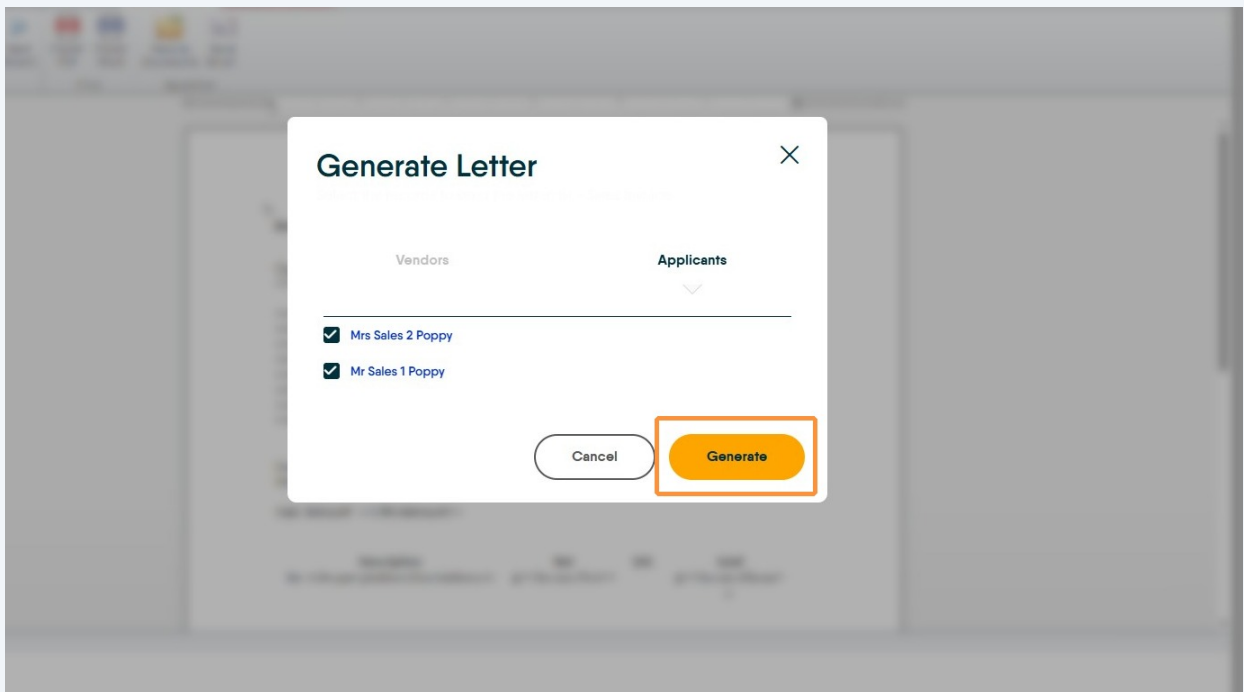
If there are multiple they will be listed on the screen.



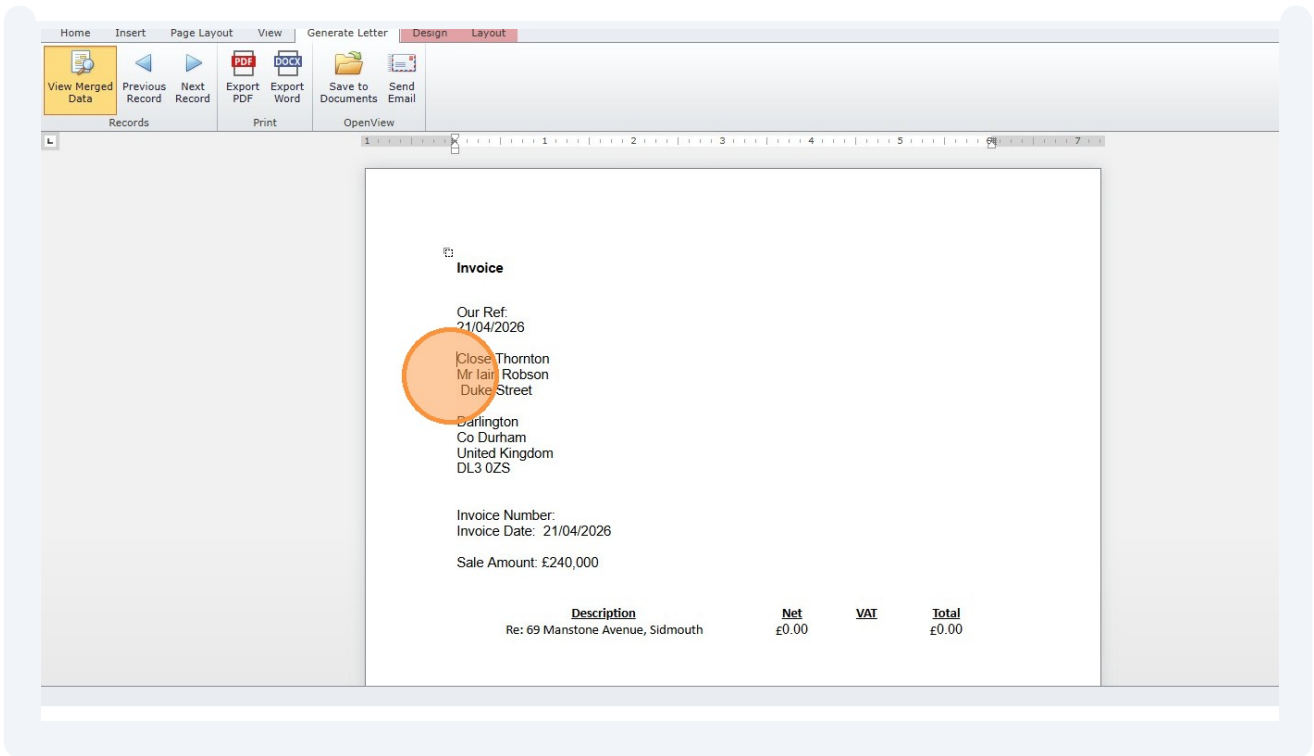
8 Click on **Applicants** to review the Purchasers details.



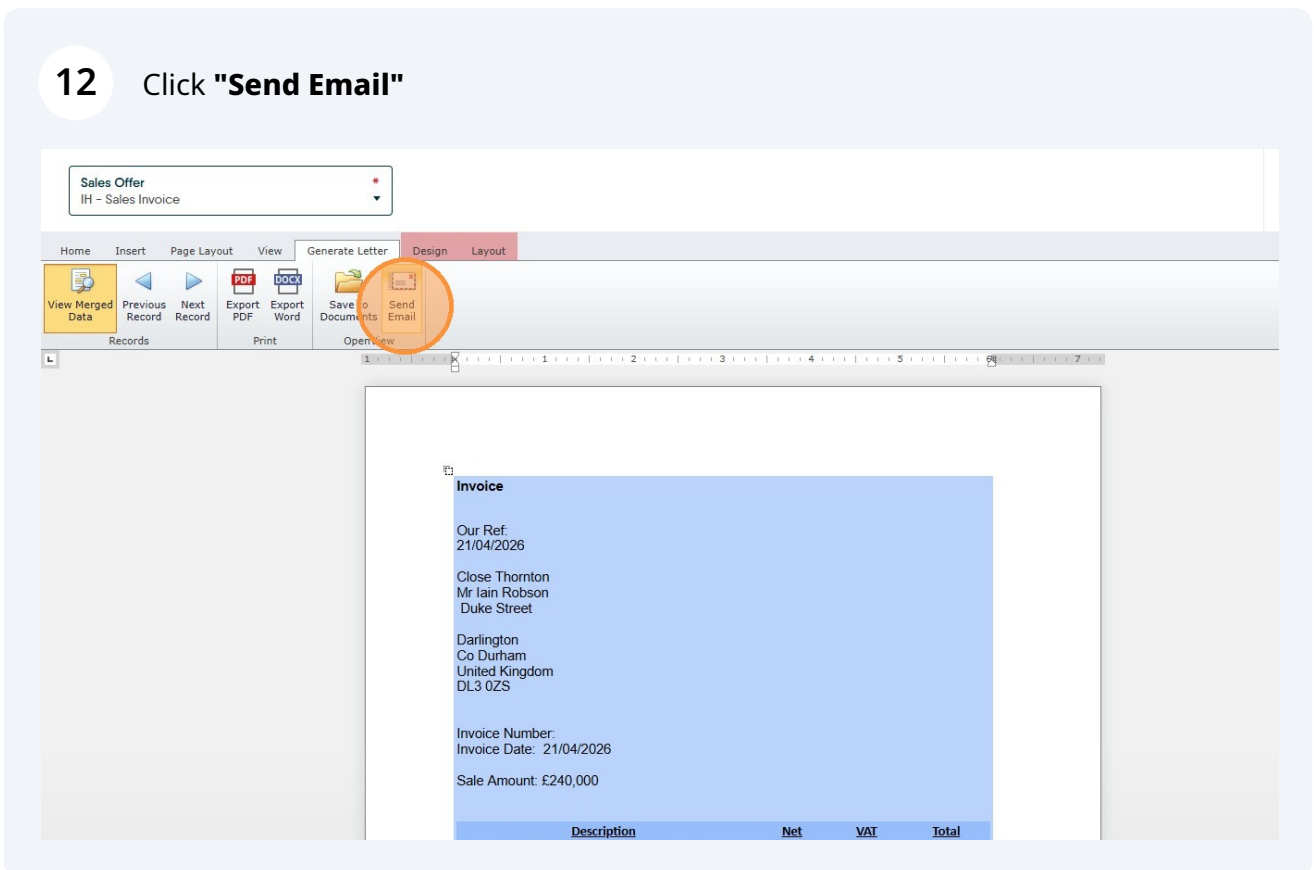
9 If these are correct, click **Generate**





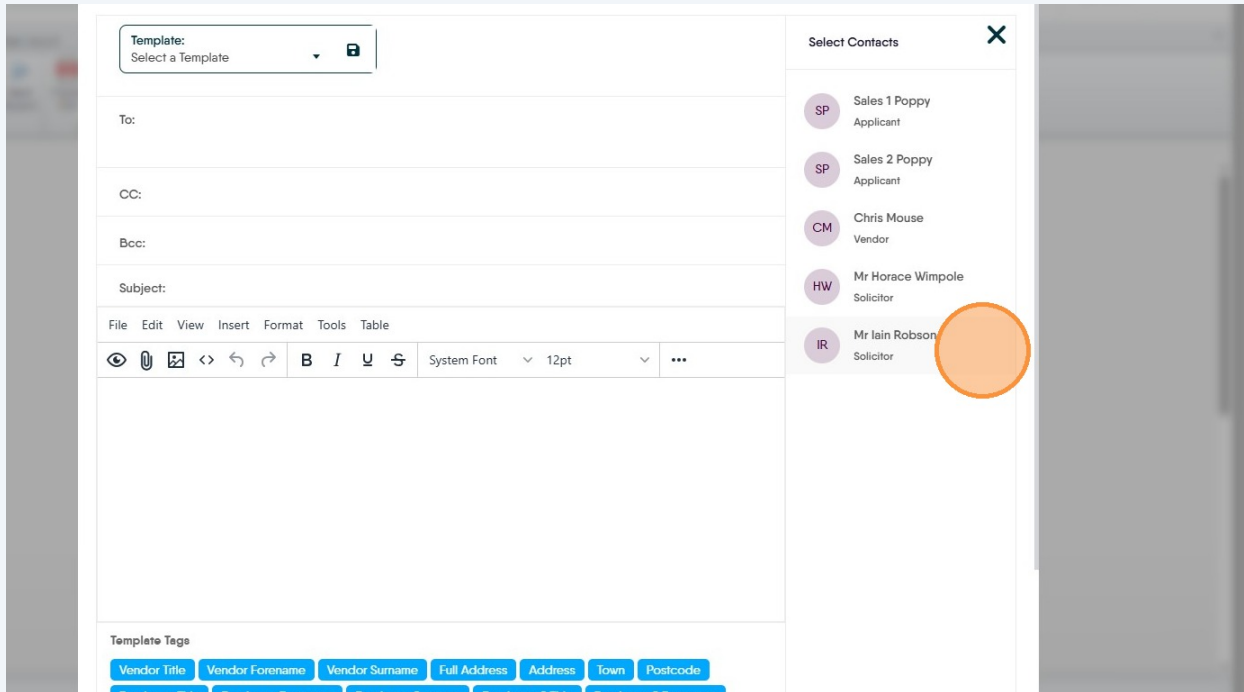


## 12 Click "Send Email"



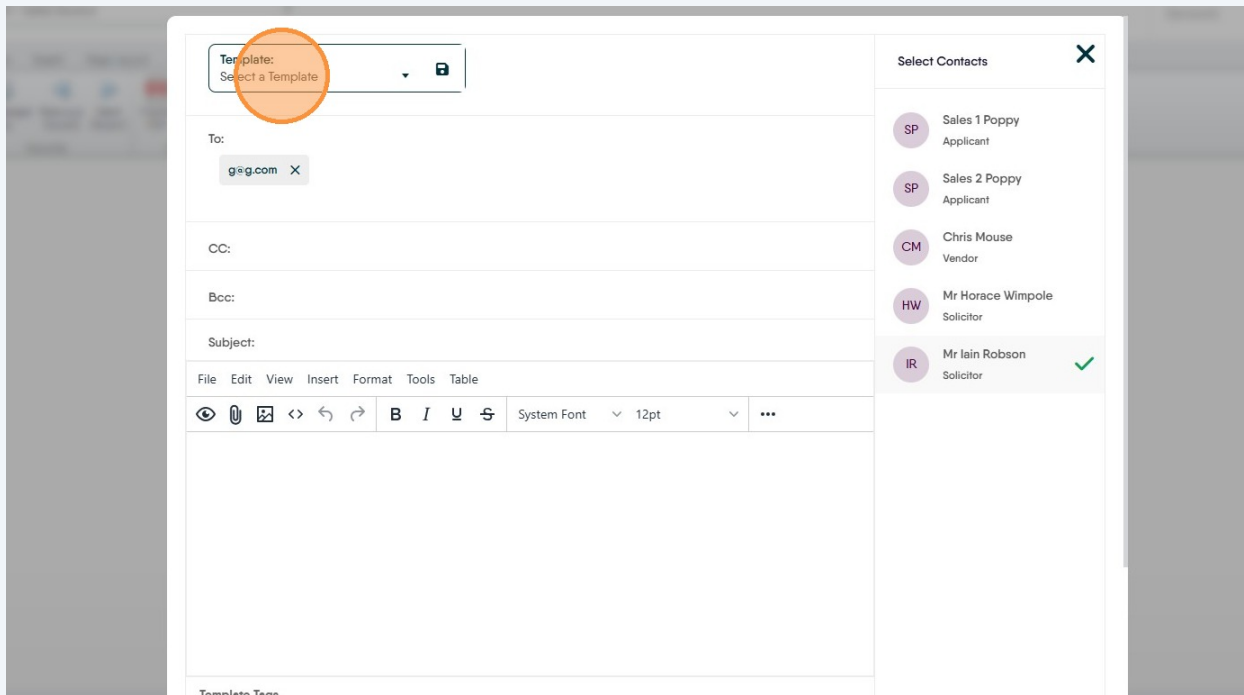
13

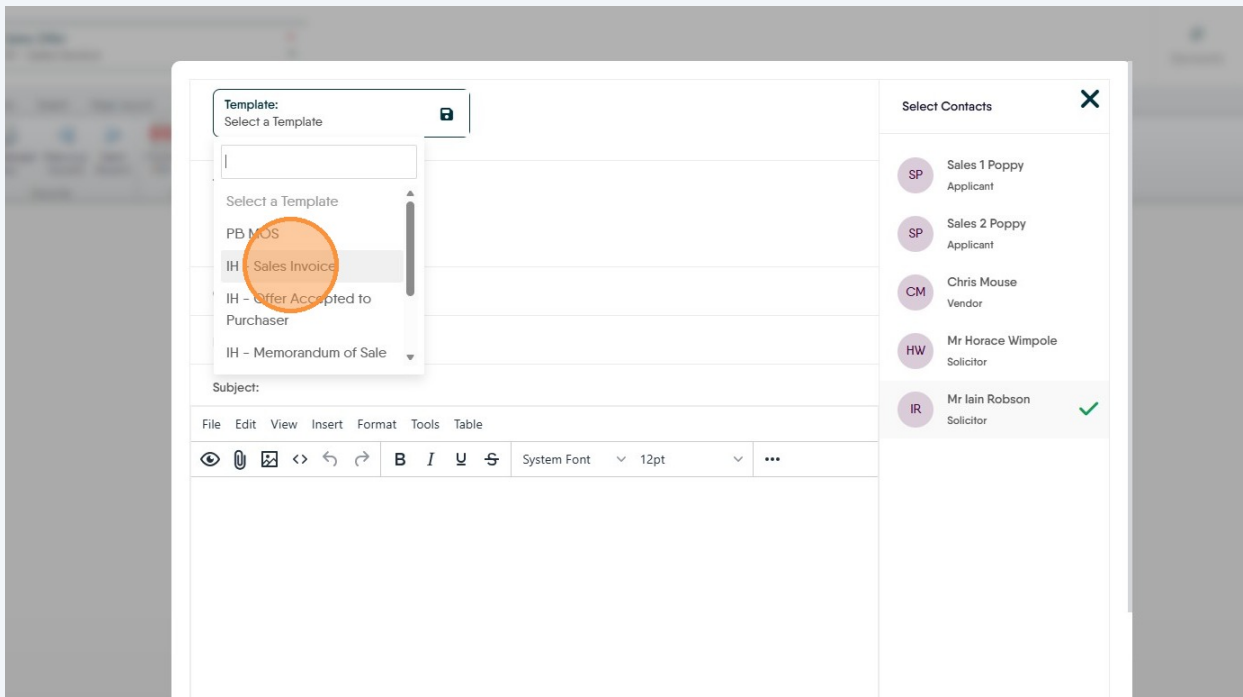
On the email screen select the email addresses you are to send the letter to by clicking on them.



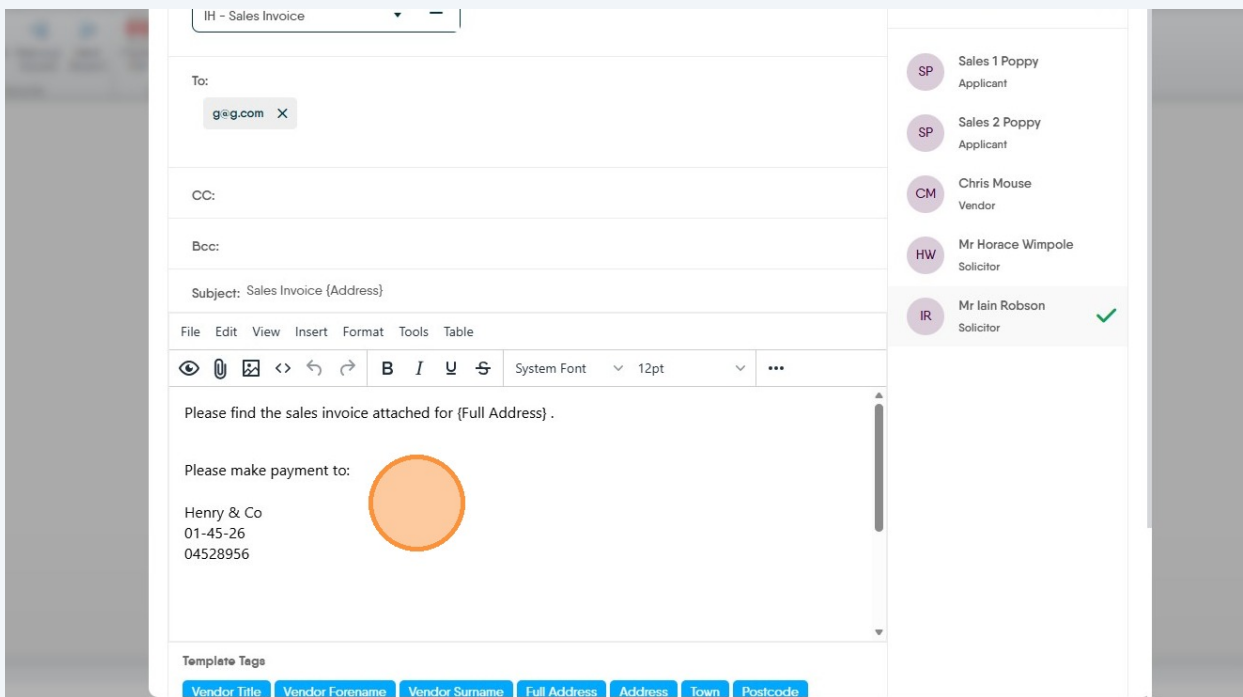
14

Click "Select a Template" If you have a template created you can select that, or type your text into the email.





## 15 The text will show in the email field



16

Click "Send Email"

The image shows a screenshot of a web form with several input fields. The fields are arranged in a grid-like structure. The fields are: Address, Address, Town, Postcode, Purchaser 2 Title, Purchaser 2 Forename, Branch Phone 2, Branch Email, Branch Fax, Branch Town, Branch County, User Surname, User Phone, User Branch, and User Job Title. The 'Send Email' button is located at the bottom right of the form and is highlighted with an orange border. The button text is 'Send Email' followed by a right-pointing arrow.