

Emailing from Property Management Tasks



Learn how to efficiently send emails directly to landlords/contractors or tenants via the CRM Property Management portal. This guide simplifies the process of attaching files and managing communications for maintenance and billing tasks.

Job Selection

- 1 From the Task List in Property Management click property name to select property task.

Search for reports that people have created for you

Search for ID, name, report, telephone, email or address

Create Job

My Jobs

Feedback Centre

Invoices

Filter by Priority Level

High

Medium

Low

Water

Gas

Electric

Court of Protection

David

Steve

Awaiting Invoice

None

Offered

633372

24 Westgarth Terrace, Darlington (Radiator Heating)

ASSIGN

Complete Job

Cancel Job

Priority: None

Notes: ;wojg;ls f;l v'kg'lb'b,df'gd, df

Miss Ella Petch

Created: 06/11/20;

Updated: 04/02/2

15:41:17

Updated by: Trainin

Email Correspondence

2

Select either Tenant, Landlord or Contractor to view the contact details. For this example we will use Landlord. Click the landlord's email address to open email composer.

Property Management > Maintenance Jobs > Report #0333/2

24 Westgarth Terrace, Darlington

Job Fault
Radiator - Heating

Priority Level
Select Priority Level

wojgls fj v'kg'lb'b,df'gd, df

Offered

Assign

Sign In Sign Out

Photos Tenant(s) Offers **Landlord(s)** Contractor Comments Feedback Invoice Documents Audit

PG

Mrs Pamela Green
zagg.dave@gmail.com
0712324567898
0712324567898

Miss Ella Petchzagg.dave@gmail.com

24 Westgarth Terrace
Darlington
County Durham
DL1 2LA
UK

Vulnerable Occupier No
Access Authority Yes
Contact Details Consent Yes
Created: 06/11/2025 14:51:34
Updated: 27/04/2026 21:04:24
Job Completion Date:
Price Agreed: £0.00
park on road

3

Once in the email composer, if available select a template from the **'Template' menu**. E.G. Select 'Quote to Landlord' from the **Template** drop down. Or create one for future use.

Template:
Select a Template

Select a Template
Gas Safety
Electric
Carbon Monoxide
Test3
Maintenance

Subject: {Property Address}

File Edit View Insert Format Tools Table

B *I* U System Font 12pt

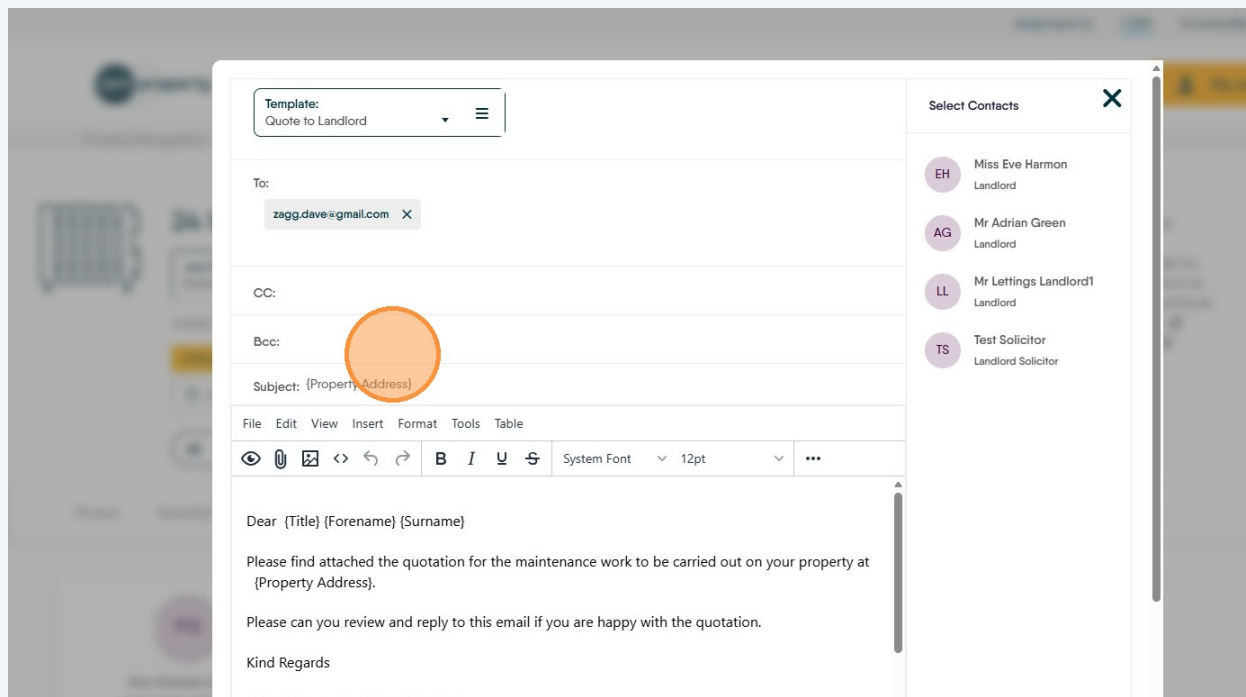
Select Contacts

EH Miss Eve Harmon
Landlord

AG Mr Adrian Green
Landlord

LL Mr Lettings Landlord1
Landlord

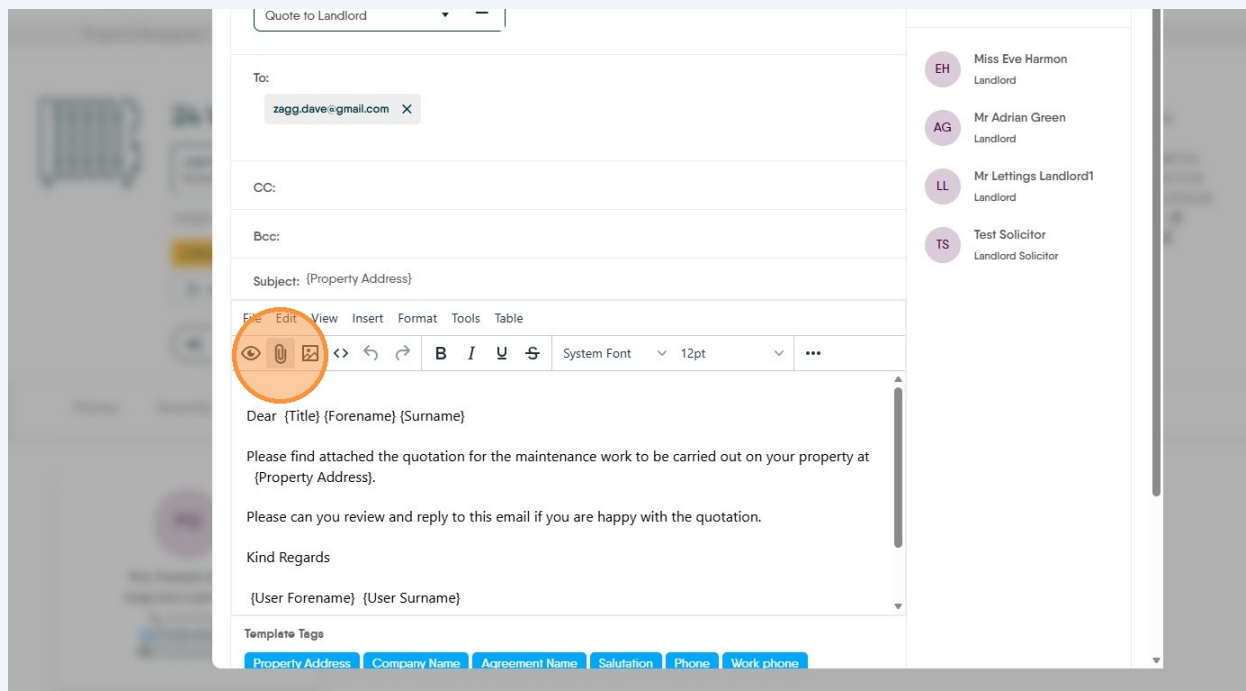
TS Test Solicitor
Landlord Solicitor

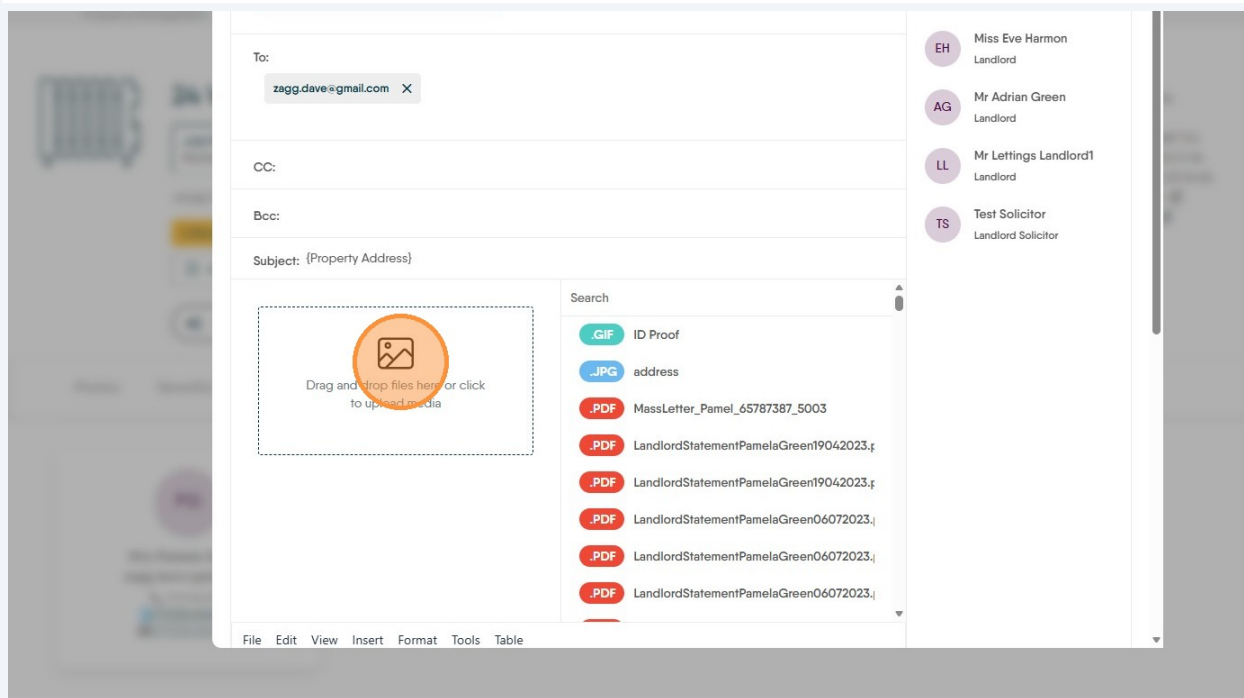


4

Click the attachment icon and select the document to upload. If the document is saved in the property record it will show in the list.

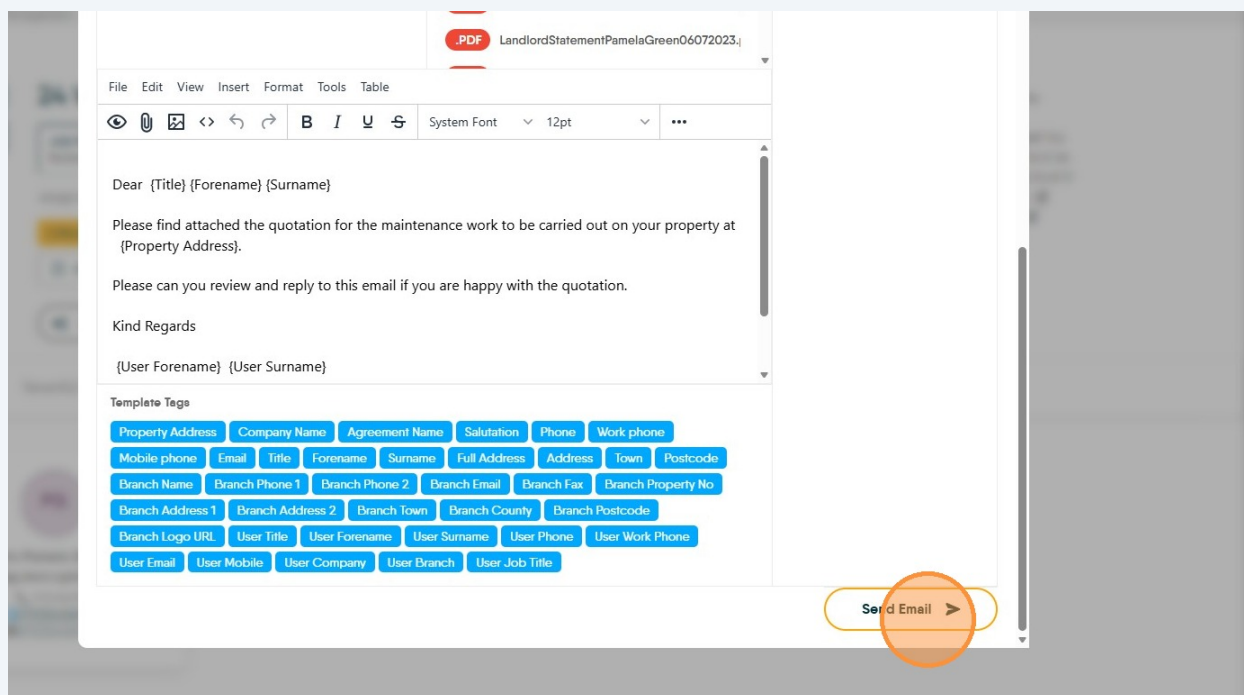
In this case the document is saved in a folder on the computer and needs to be either 'drag and dropped' from a folder or the email it was sent on, or searched for in your computers folders.





5

Click **"Send Email"** this will send the email to the landlord and a record kept in the journal.



Verification and History

6

Click **Audit** tab to verify action history.

iam property

My dayLettingsSalesAccountsReportingCommunications

27

My account

Property ManagementMaintenance JobsReport #633372

24 Westgarth Terrace, Darlington

Job Fault

Radiator - Heating

Priority Level

Select Priority Level

wojg,ls f,l v'kg'lb'b,df'gd, df

Offered

Assign

Sign In

Sign Out

EP

Miss Ella Petchzagg.dave@gmail.com

24 Westgarth Terrace
Darlington
County Durham
DL1 2LA
UK

Vulnerable Occupier No
Access Authority Yes
Contact Details Consent Yes
Created: 06/11/2025 14:51:34
Updated: 04/02/2026 15:41:17
Job Completion Date:
Price Agreed: £0.00
park on road

PhotosTenant(s)OffersLandlord(s)ContractorCommentsFeedbackInvoiceDocumentsAudit

Search

Date	User	Field	Old Value	New Value
27/04/2026 20:54:32	Training Dave	Document	Demo Invoice	Demo Quote
27/04/2026 20:48:48	Training Dave	Document		Uploaded a new document: De...