

Using Mail Merge and Email Templates



This guide demonstrates how to send a Mail Merge, using a specific email template. Shows, how to create an email template (for a specific recipient type) and save it. Then how to pick up and use this template in Mail Merge.

Mail Merge Navigation

1 Navigate to <https://crm.iamproperty.com/MyDay>

The screenshot shows the 'iamproperty' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main heading is 'Welcome back, Training'. Below this are links for 'Add New Record', 'View property management', and 'Visit help centre'. A search bar is present. The 'Today's events' section shows two events: 'Jemmas 8-4.30' at 08:00 and 'Test test' at 12:00. The 'My tasks' section shows a list of tasks with columns for Status, Name, Priority, Start date, and Due date.

Status	Name	Priority	Start date	Due date
Not Started	Call Audrey	High	08/Oct/2025	08/Oct/2025
Not Started	test	High	24/Oct/2025	24/Oct/2025
Not Started	Visit	High	28/Oct/2025	28/Oct/2025
Not Started	title	High	29/Oct/2025	29/Oct/2025

2 Click "**Communications**" then to "**Email Merge**" section

☐	File Ty...	File N...	Recip...	Recip...	D... ↓	Email ...	Status	Download
☐	PDF	MassLet...	Eve		11/06/2...	19/07/2...	✗ The S...	Download
☐	PDF	MassLet...	Arthur ...	zagg.da...	11/06/2...	23/07/...	✓ Email ...	Download
☐	PDF	MassLet...	David M...	david.m...	19/09/2...		✓ Lette...	Download
☐	PDF	MassLet...	David M...	david.m...	19/09/2...		✓ Lette...	Download
☐	PDF	MassLet...	David M...	david.m...	19/09/2...		✓ Lette...	Download
☐	PDF	MassLet...	Carey H...	zagg.da...	19/09/2...		✓ Lette...	Download
☐	PDF	MassLet...	Lettings...	zagg.da...	19/09/2...		✓ Lette...	Download
☐	PDF	MassLet...	jomast ...	zagg.da...	19/09/2...		✓ Lette...	Download
☐	PDF	MassLet...	Lettings...	zagg.da...	19/09/2...		✓ Lette...	Download
☐	PDF	MassLet...	Lettings...	zagg.da...	19/09/2...		✓ Lette...	Download
☐	PDF	MassLet...	David M...	david.m...	19/09/2...		✓ Lette...	Download

SMS Inbox

Email Merge

Email Tracker

E-Sign

Mail Merge

Marketing toolkit

SMS Merge

Email Template Creation

3

Select the **record type** you are creating the Template for e.g. "Landlord" This will be the same as the record type you are sending the mail merge to.

Record Type
Select record type

Templates
Select email template

Recipients
0 Recipients Selected

Subject
Enter email subject

Include Email Signature

File Edit View Insert Format Tools Table

sans-serif 12pt

Record Type
Select record type

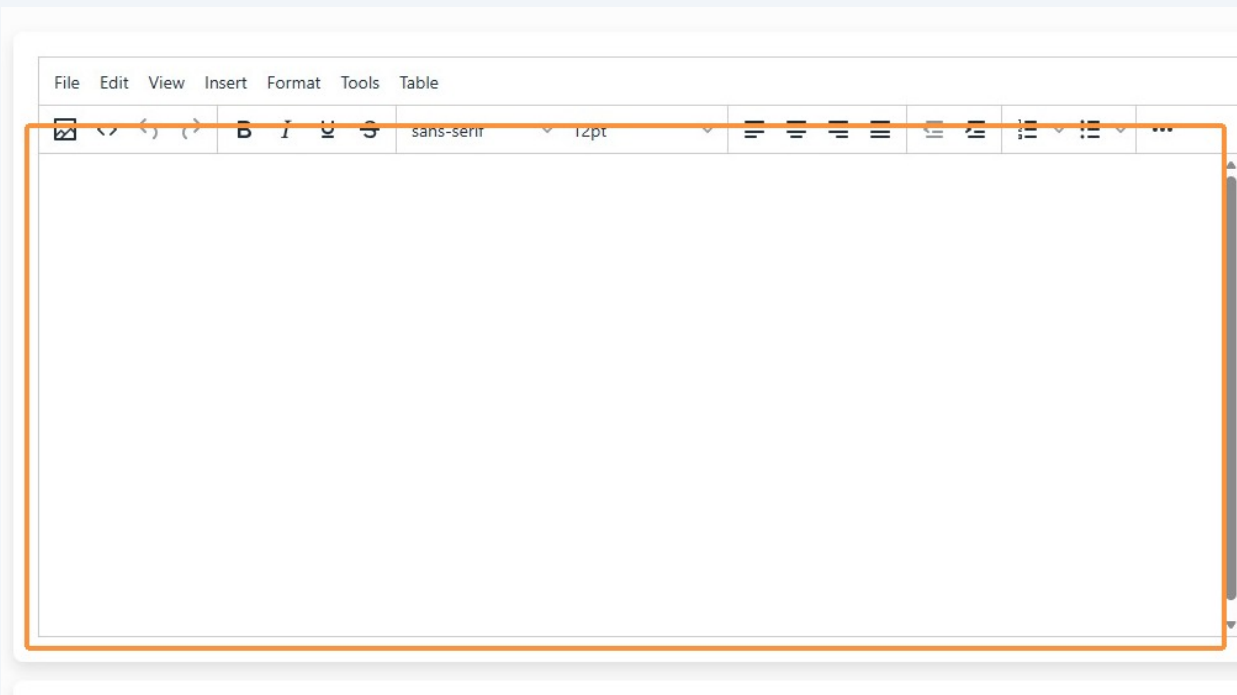
Select record type
Landlord
Tenant
Contractor
Vendor
Lettings Applicant

Track Emails

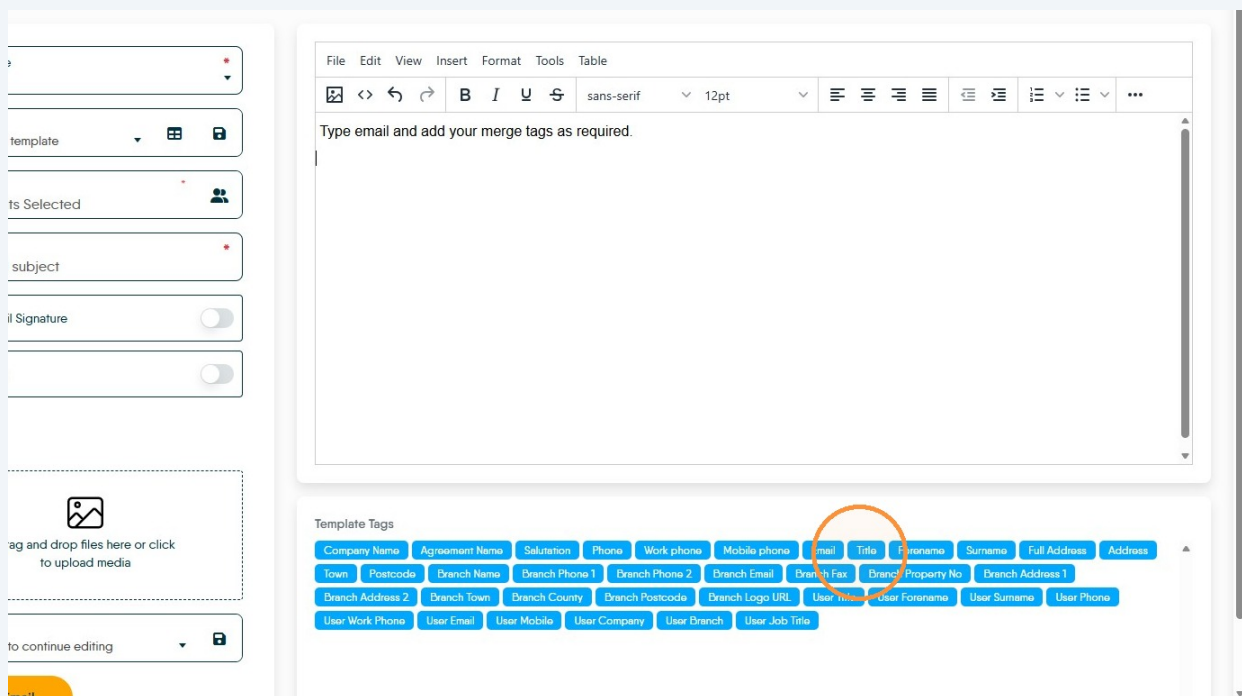
File Edit View Insert Format Tools Table

sans-serif 12pt

4 Type your email into the text box.



5 Insert desired merge tags into email body



template

ts Selected

subject

il Signature

ag and drop files here or click to upload media

to continue editing

File Edit View Insert Format Tools Table

sans-serif 12pt

Type email and add your merge tags as required.

{Title}

Template Tags

Company Name Agreement Name Salutation Phone Work phone Mobile phone Email Title Forename Surname Full Address Address

Town Postcode Branch Name Branch Phone 1 Branch Phone 2 Branch Email Branch Fax Branch Property No Branch Address 1

Branch Address 2 Branch Town Branch County Branch Postcode Branch Logo URL User Title User Forename User Surname User Phone

User Work Phone User Email User Mobile User Company User Branch User Job Title

template

ts Selected

subject

il Signature

ag and drop files here or click to upload media

to continue editing

File Edit View Insert Format Tools Table

sans-serif 12pt

Type email and add your merge tags as required.

{Title} (Forename)

Template Tags

Company Name Agreement Name Salutation Phone Work phone Mobile phone Email Title Forename Surname Full Address Address

Town Postcode Branch Name Branch Phone 1 Branch Phone 2 Branch Email Branch Fax Branch Property No Branch Address 1

Branch Address 2 Branch Town Branch County Branch Postcode Branch Logo URL User Title User Forename User Surname User Phone

User Work Phone User Email User Mobile User Company User Branch User Job Title

template

ts Selected

subject

il Signature

ag and drop files here or click to upload media

to continue editing

File Edit View Insert Format Tools Table

Type email and add your merge tags as required.

{Title} {Forename} {Surname}

Template Tags

Company Name	Agreement Name	Salutation	Phone	Work phone	Mobile phone	Email	Title	Forename	Surname	Full Address	Address
Town	Postcode	Branch Name	Branch Phone 1	Branch Phone 2	Branch Email	Branch Fax	Branch Property No	Branch Address 1			
Branch Address 2	Branch Town	Branch County	Branch Postcode	Branch Logo URL	User Title	User Forename	User Surname	User Phone			
User Work Phone	User Email	User Mobile	User Company	User Branch	User Job Title						

template

ts Selected

subject

il Signature

ag and drop files here or click to upload media

to continue editing

File Edit View Insert Format Tools Table

Type email and add your merge tags as required.

{Title} {Forename} {Surname}

{Address}

Template Tags

Company Name	Agreement Name	Salutation	Phone	Work phone	Mobile phone	Email	Title	Forename	Surname	Full Address	Address
Town	Postcode	Branch Name	Branch Phone 1	Branch Phone 2	Branch Email	Branch Fax	Branch Property No	Branch Address 1			
Branch Address 2	Branch Town	Branch County	Branch Postcode	Branch Logo URL	User Title	User Forename	User Surname	User Phone			
User Work Phone	User Email	User Mobile	User Company	User Branch	User Job Title						

template

ts Selected

subject

il Signature

ag and drop files here or click to upload media

to continue editing

File Edit View Insert Format Tools Table

B

I

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sans-serif

12pt

...

Type email and add your merge tags as required.

{Title} {Forename} {Surname}

{Address}

{Branch Name}|

Template Tags

Company Name

Agreement Name

Salutation

Phone

Work phone

Mobile phone

Email

Title

Forename

Surname

Full Address

Address

Town

Postcode

Branch Name

Branch Phone 1

Branch Phone 2

Branch Email

Branch Fax

Branch Property No

Branch Address 1

Branch Address 2

Branch Town

Branch County

Branch Postcode

Branch Logo URL

User Title

User Forename

User Surname

User Phone

User Work Phone

User Email

User Mobile

User Company

User Branch

User Job Title

template

ts Selected

subject

il Signature

ag and drop files here or click to upload media

to continue editing

File Edit View Insert Format Tools Table

B

I

U

sans-serif

12pt

...

Type email and add your merge tags as required.

{Title} {Forename} {Surname}

{Address}

{Branch Name} {Branch Phone 1}

Template Tags

Company Name

Agreement Name

Salutation

Phone

Work phone

Mobile phone

Email

Title

Forename

Surname

Full Address

Address

Town

Postcode

Branch Name

Branch Phone 1

Branch Phone 2

Branch Email

Branch Fax

Branch Property No

Branch Address 1

Branch Address 2

Branch Town

Branch County

Branch Postcode

Branch Logo URL

User Title

User Forename

User Surname

User Phone

User Work Phone

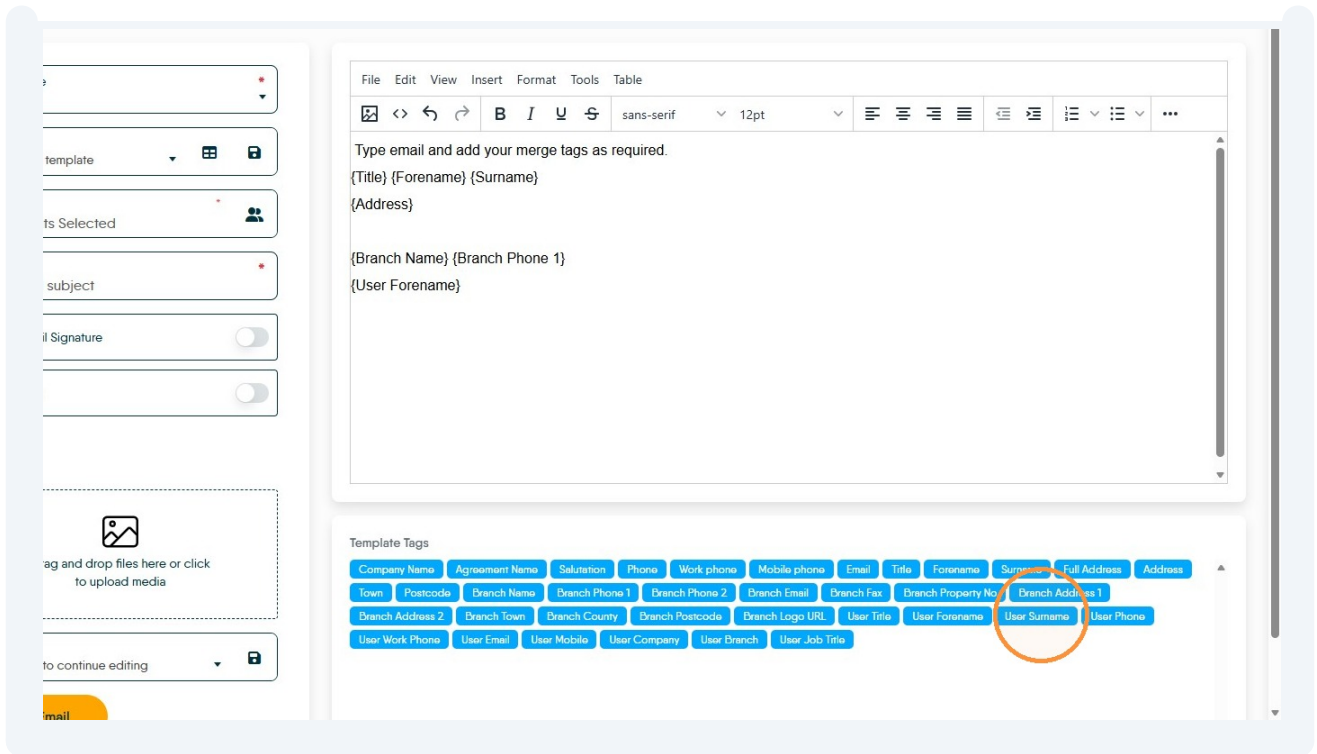
User Email

User Mobile

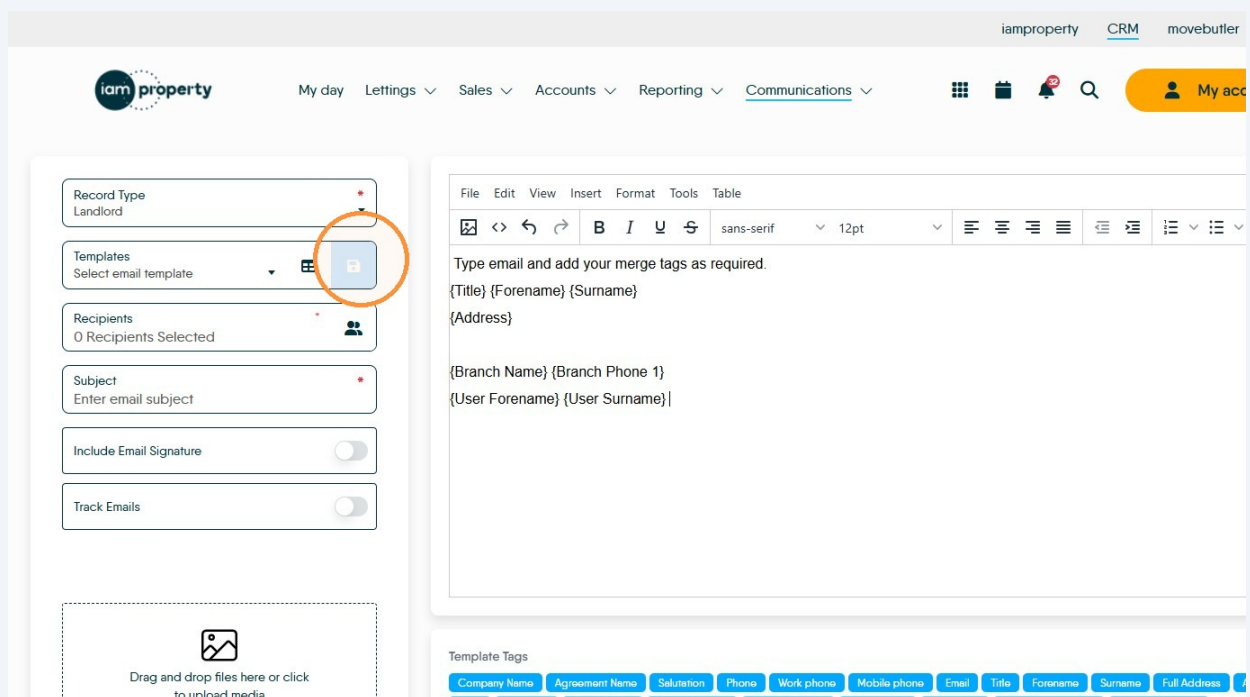
User Company

User Branch

User Job Title



6 Name new email template e.g. "Email Letter merge test"



7 Click **Save** icon to create new email template

Record Type
Landlord

Templates
Email Letter merge test

Recipients
0 Recipients Selected

Subject
Enter email subject

Include Email Signature

Track Emails

File Edit View Insert Format Tools Table

Type email and add your merge tags as required.

{Title} {Forename} {Surname}

{Address}

{Branch Name} {Branch Phone 1}

{User Forename} {User Surname}

Letter Configuration

8 Navigate to Mail Merge section

iamproperty CRM movebutler iams

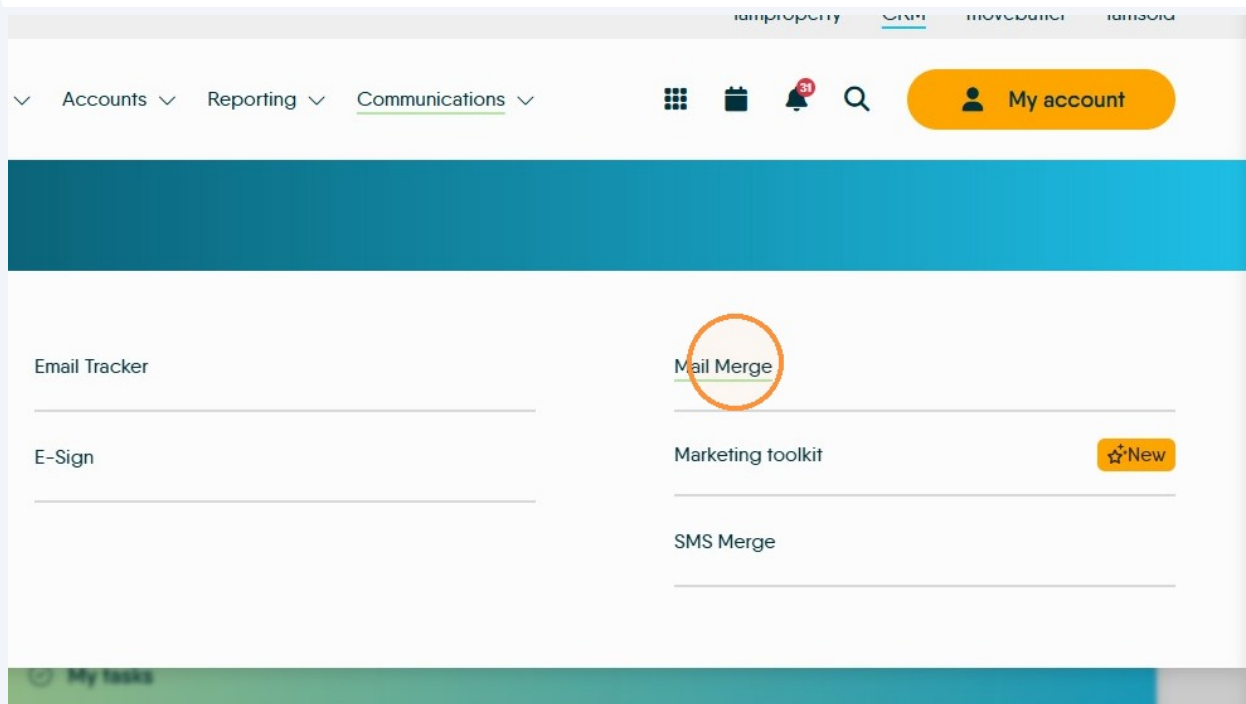
My day Lettings Sales Accounts Reporting Communications

e back, Training

View property management Visit help centre

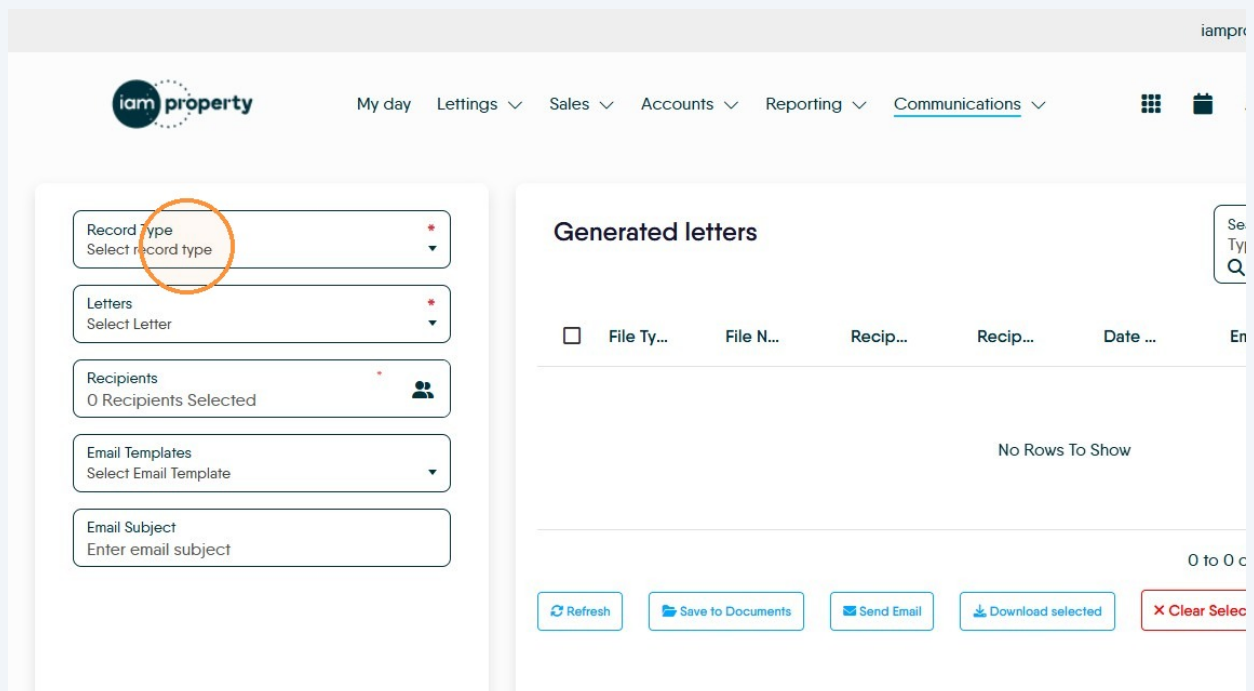
My tasks

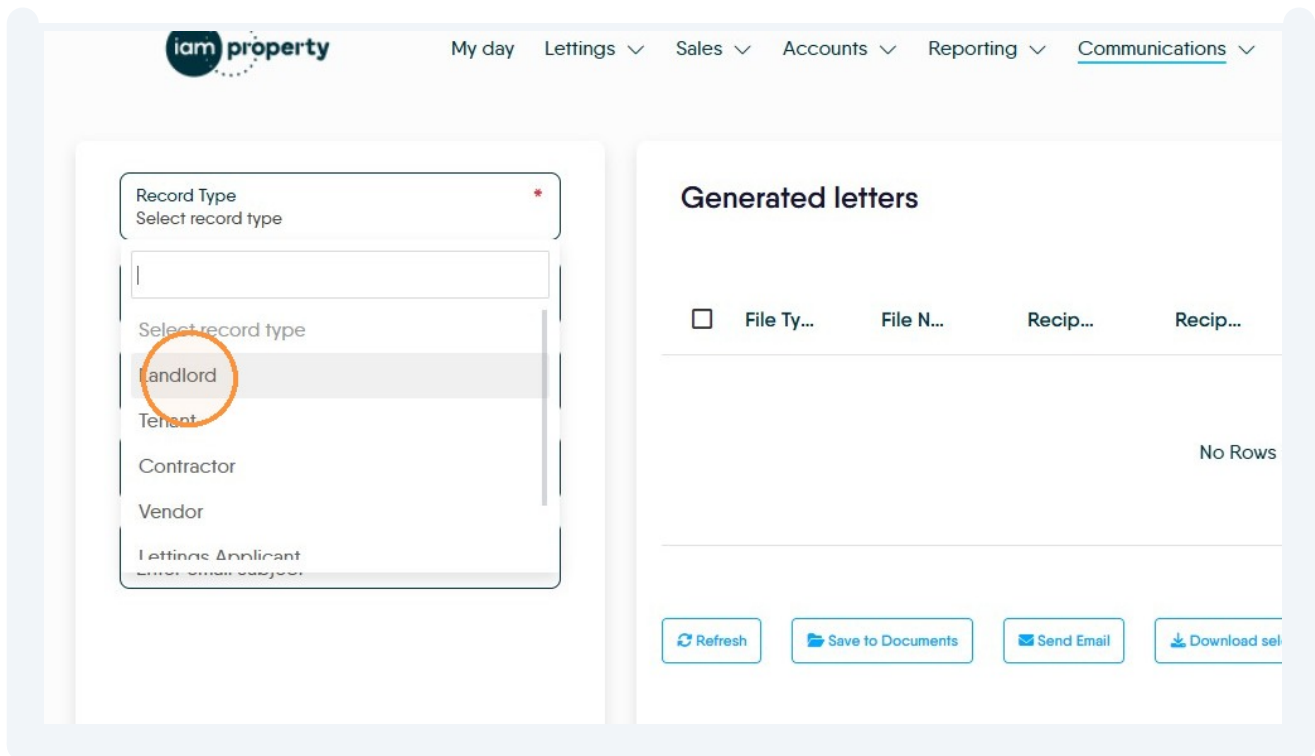
Status	Name	Priority	Start date	Due date
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9

Select the record type you are sending the Mail Merge to, this will be the same as the record type you created the email template for. eg "Landlord" as Record Type

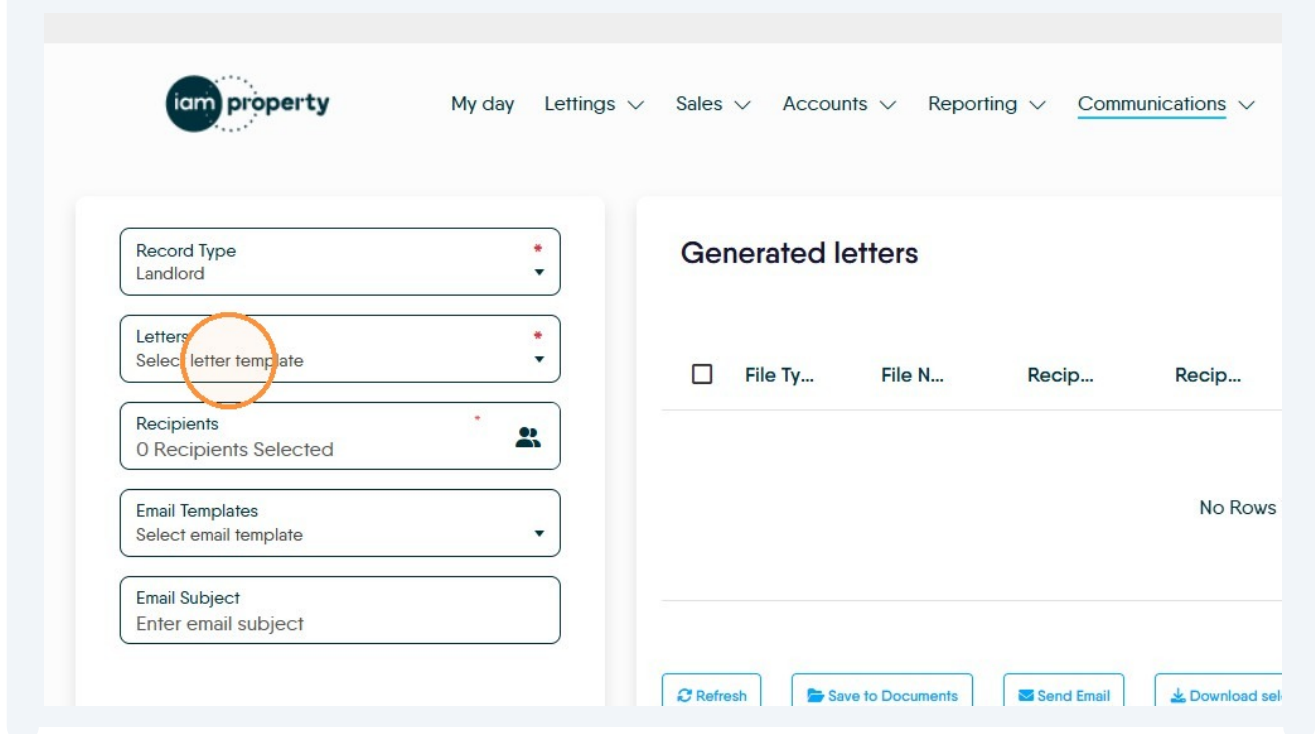




10

From **"Letters"** select the mail merge letter template you created and uploaded previously from the menu e.g. "Mail Merge Test"

Mail Merge letters are added in the Configuration section of "My Account" in the specific 'Letters' menu.



Record Type
Landlord

Letters
Select letter template

Select letter template

Mail Merge Test

Email Subject
Enter email subject

Generated letters

☐	File Ty...	File N...	Recip...	Recip...
No Rows				

Refresh

Save to Documents

Send Email

Download sel

Recipient Selection

11 Click **Recipients** icon to open selection list.

N.B. The recipient for the letter will be the same as the one used when the email template was created e.g. Landlord

Record Type
Landlord

Letters
Mail Merge Test

Recipients
0 Recipients Selected

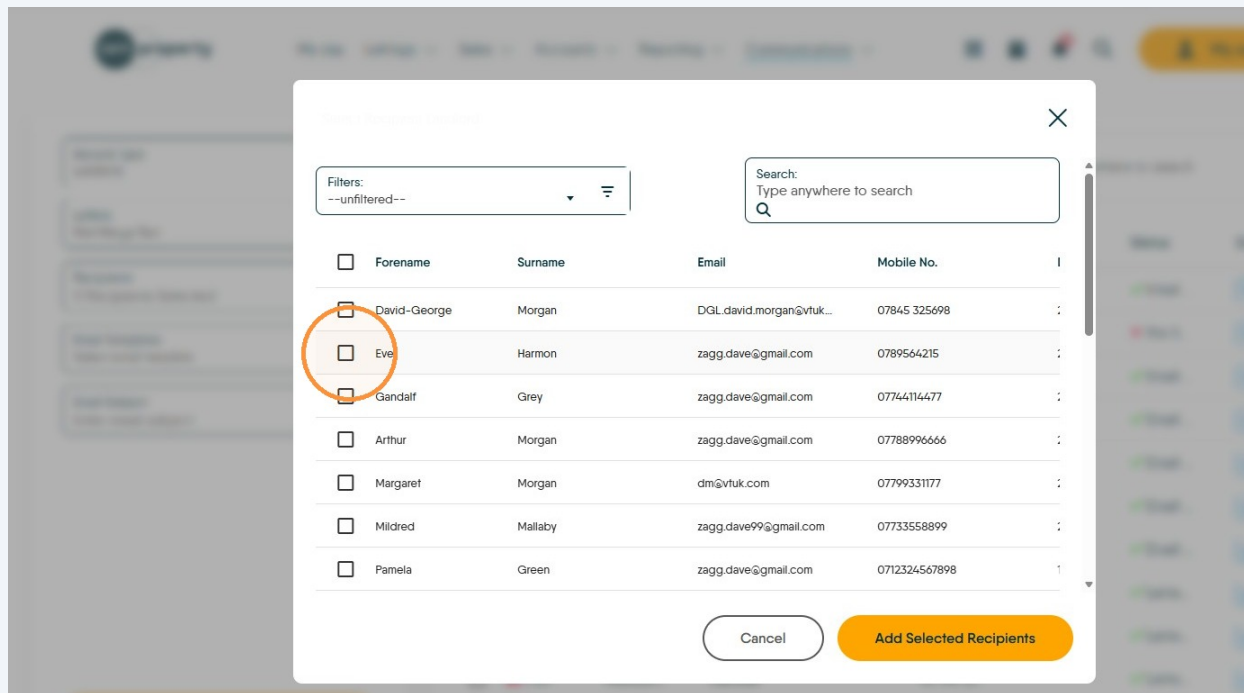
Email Templates
Select email template

Email Subject
Enter email subject

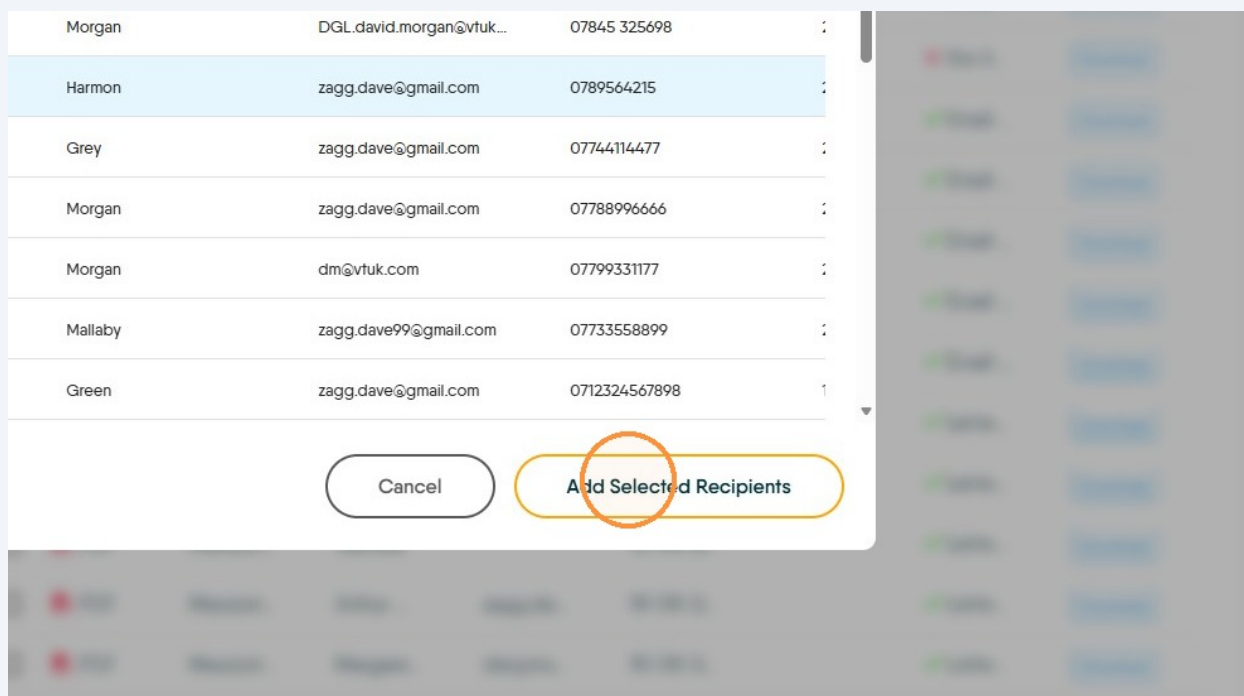
Generated letters

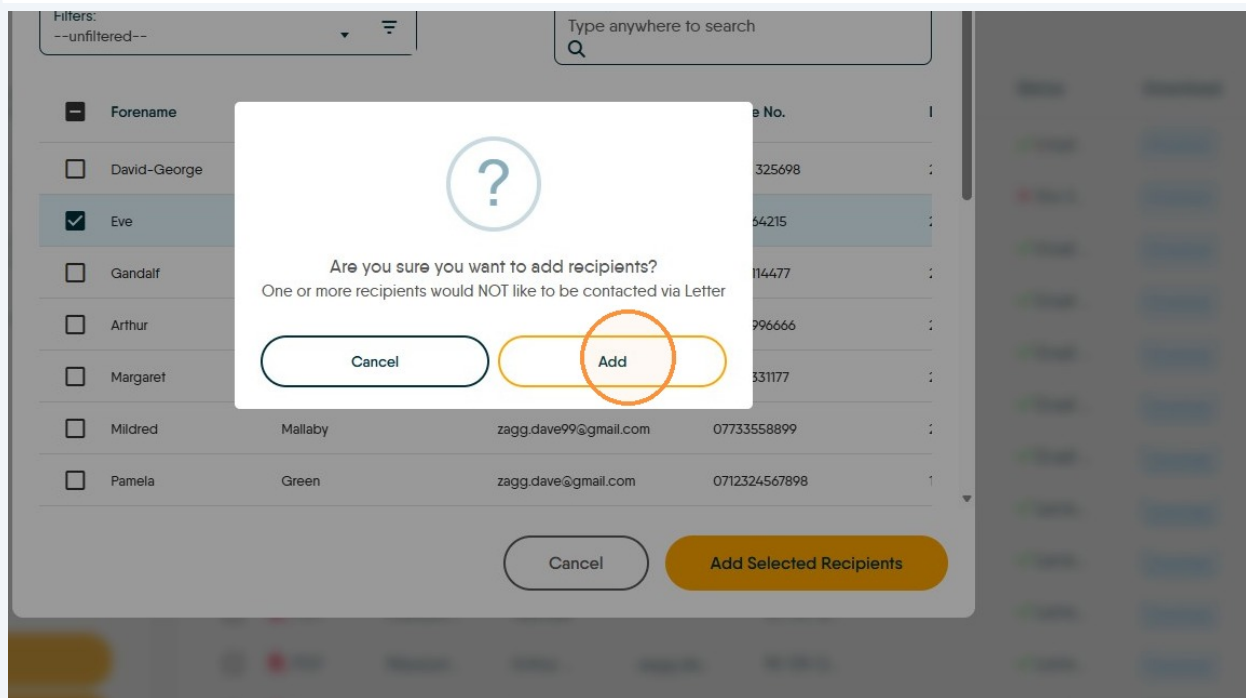
☐	File Ty...	File N...	Recip...	Recip...
☐	PDF	MassLet...	David-...	
☐	PDF	MassLet...	Eve	
☐	PDF	MassLet...	Gandalf	
☐	PDF	MassLet...	Arthur	
☐	PDF	MassLet...	Margaret	
☐	PDF	MassLet...	Mildred	

12 Select desired recipient checkbox



13 Click "Add Selected Recipients". If the GDPR settings for any of the recipients shows they have declined contact by email you will need to either Confirm or remove those recipients.





14 Select the **Email Template** (the one created previously)

Record Type
Landlord

Letters
Mail Merge Test

Recipients
1 Recipients Selected

Email Templates
Select email template

Email Subject
Enter email subject

Generated letters

☐	File Ty...	File N...	Recip...	Recip...
☐	PDF	MassLet...	David-...	
☐	PDF	MassLet...	Eve	
☐	PDF	MassLet...	Gandalf	
☐	PDF	MassLet...	Arthur	
☐	PDF	MassLet...	Margaret	
☐	PDF	MassLet...	Mildred	
☐	PDF	MassLet...	Pamela	
☐	PDF	MassLet...	David-...	DGL.da...

Mail Merge Test

Recipients

1 Recipients Selected

Email Templates

Select email template

Select email template

Demo Template

DM- Christmas opening hours

Generate PDF

☐	File Ty...	File N...	Recip...	Recip...
☐	PDF	MassLet...	David-...	
☐	PDF	MassLet...	Eve	
☐	PDF	MassLet...	Gandalf	
☐	PDF	MassLet...	Arthur	
☐	PDF	MassLet...	Margaret	
☐	PDF	MassLet...	Mildred	
☐	PDF	MassLet...	Pamela	
☐	PDF	MassLet...	David-...	DGL.da...
☐	PDF	MassLet...	Eve	
☐	PDF	MassLet...	Gandalf	

15 Enter the email subject in **Email Subject** field

Letters

Mail Merge Test

Recipients

1 Recipients Selected

Email Templates

Demo Template

Email subject

Enter email subject

☐	File Ty...	File N...	Recip...	Recip...
☐	PDF	MassLet...	David-...	
☐	PDF	MassLet...	Eve	
☐	PDF	MassLet...	Gandalf	
☐	PDF	MassLet...	Arthur	
☐	PDF	MassLet...	Margaret	
☐	PDF	MassLet...	Mildred	
☐	PDF	MassLet...	Pamela	
☐	PDF	MassLet...	David-...	DGL.da...
☐	PDF	MassLet...	Eve	

16 Click "Generate PDF" or Generate Word as required.

Email Templates

Demo Template

Email Subject

Test email

Generate PDF

Generate Word

☐	 PDF	MassLet...	Eve	
☐	 PDF	MassLet...	Gandalf	
☐	 PDF	MassLet...	Arthur	
☐	 PDF	MassLet...	Margaret	
☐	 PDF	MassLet...	Mildred	
☐	 PDF	MassLet...	Pamela	
☐	 PDF	MassLet...	David-...	DGL.da...
☐	 PDF	MassLet...	Eve	
☐	 PDF	MassLet...	Gandalf	
☐	 PDF	MassLet...	Arthur ...	zagg.da...
☐	 PDF	MassLet...	Margare...	dm@vtu...

17 Select generated letter from list

☐	File Ty...	File N...	Recip...	Recip...	D... ↓	Email ...	Stat
☐	 PDF	MassLet...	Eve		11/06/2...		✓ L
☐	 PDF	MassLet...	Arthur ...	zagg.da...	11/06/2...	23/07/...	✓ E
☐	 PDF	MassLet...	David M...	david.m...	19/09/2...		✓ L
☐	 PDF	MassLet...	David M...	david.m...	19/09/2...		✓ L
☐	 PDF	MassLet...	David M...	david.m...	19/09/2...		✓ L
☐	 PDF	MassLet...	Carey H...	zagg.da...	19/09/2...		✓ L
☐	 PDF	MassLet...	Lettings...	zagg.da...	19/09/2...		✓ L
☐	 PDF	MassLet...	jomast ...	zagg.da...	19/09/2...		✓ L
☐	 PDF	MassLet...	Lettings...	zagg.da...	19/09/2...		✓ L
☐	 PDF	MassLet...	Lettings...	zagg.da...	19/09/2...		✓ L

18 Click **Send Email** to process selected records

☐	 PDF	MassLet...	David M...	david.m...	19/09/2...	✓
☐	 PDF	MassLet...	Carey H...	zagg.da...	19/09/2...	✓
☐	 PDF	MassLet...	Lettings...	zagg.da...	19/09/2...	✓
☐	 PDF	MassLet...	jomast ...	zagg.da...	19/09/2...	✓
☐	 PDF	MassLet...	Lettings...	zagg.da...	19/09/2...	✓
☐	 PDF	MassLet...	Lettings...	zagg.da...	19/09/2...	✓
☐	 PDF	MassLet...	David M...	david.m...	19/09/2...	✓
☐	 PDF	MassLet...	David M...	david.m...	19/09/2...	✓

1 to 12 of 83

Send e-mail to each selected records with letters in attachment

[Refresh](#) [Save to Documents](#) [Send Email](#) [Download selected](#) [Clear Selected](#)