



SmartMail

OnTheMarket



Users Guide


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Off Market Prospecting


Detailed Map and List search

Off-Market Opportunities



TARGET an Area Using Our Detailed Map Search

Send letters and mailers using our map search and define your TARGET areas / properties.



SEARCH an Area with Postcode Information

Send letters using our postcode, town or street list search facility.

You can use **detailed map** and **list search** to send out mailings to any residential properties in your area. This facility can be used for campaigns such as near neighbour, sold in street, market appraisals and invitation to value more.

Both list and map search lead to the same thing, creating your Direct Mail piece, the only difference between them is the initial page.

List search is useful if you have a list of specific streets or postcodes that you want to target, you can simply use the 'Filter Data' to easily add them to your mailing list, click on the ones you want until you are happy with the amount.

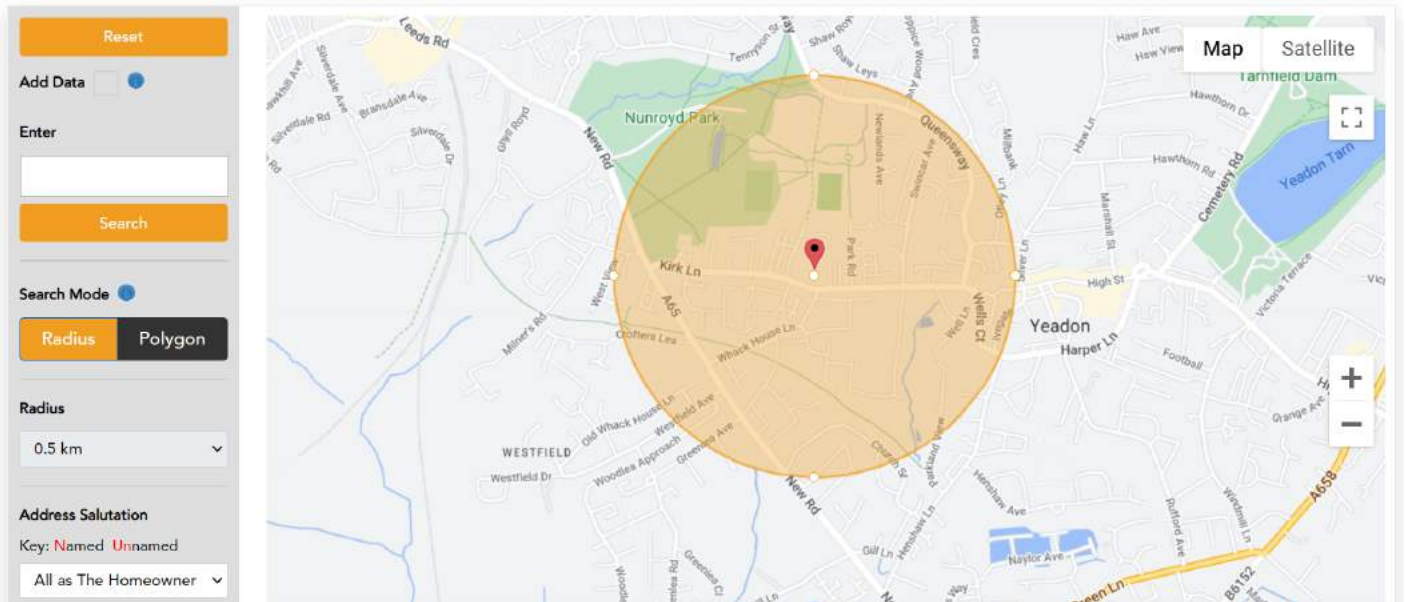
Target area & address formatting selection
Number of selected addresses: Next

Address Salutation: All as The Homeowner ▼

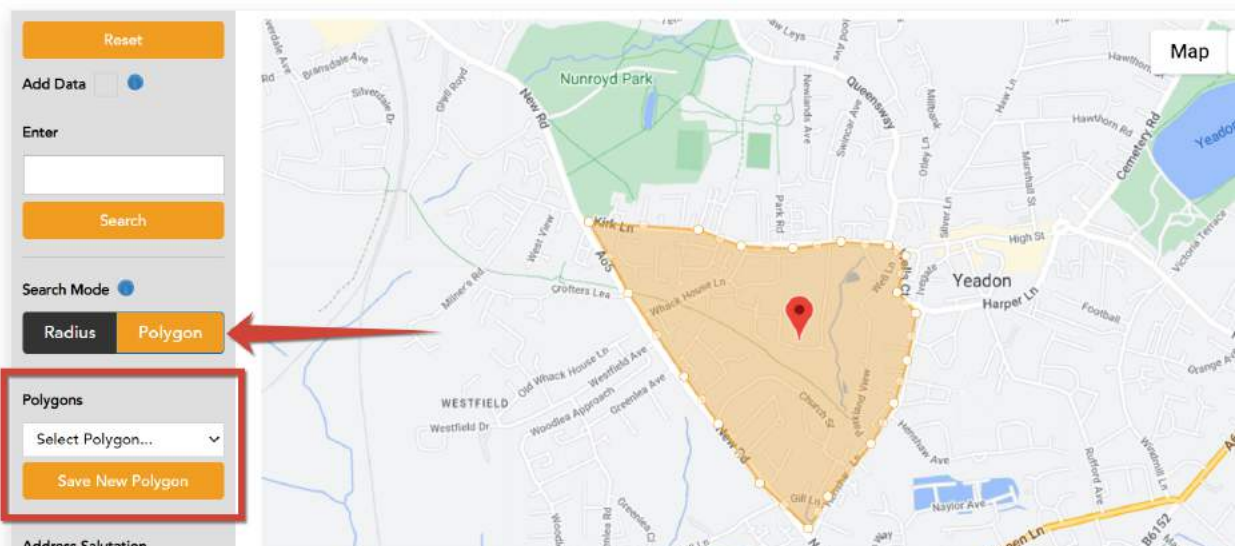
Filter Data:

District	Sector	Postcode	Town / Suburbs	Village / Locality	Street
No Records	CR0 0	CR0 0AA	CARSHALTON	BEDDINGTON	ABBEY ROAD
	CR0 1	CR0 0AB	CROYDON	BELMONT	ABBOTS GREEN
	CR0 2	CR0 0AD	MORDEN	CHEAM	ABBOTSBURY ROAD
	CR0 3	CR0 0AE	SUTTON	HACKBRIDGE	ABBOTSLEIGH CLOSE
	CR0 4	CR0 0AF	WALLINGTON	NEW ADDINGTON	ABBOTTS ROAD
	CR0 5	CR0 0AG			ABERCONWAY ROAD
	CR0 6	CR0 0AH			ABERDEEN ROAD
	CR0 7	CR0 0AJ			ABINGER AVENUE

Map Search is useful if you have a centre point postcode of a property that you have just sold, is for sale or the office and you want to mail a radius around that area. You can adjust the size of your radius by increasing or decreasing the size of the central circle. Then simply add an address salutation that will appear on your final mailing piece.



Within Map Search you are also able to draw points to map out exactly where you want to mail by simply clicking the areas of the map and joining them up. This will then give you a totalling of all the properties available to mail.

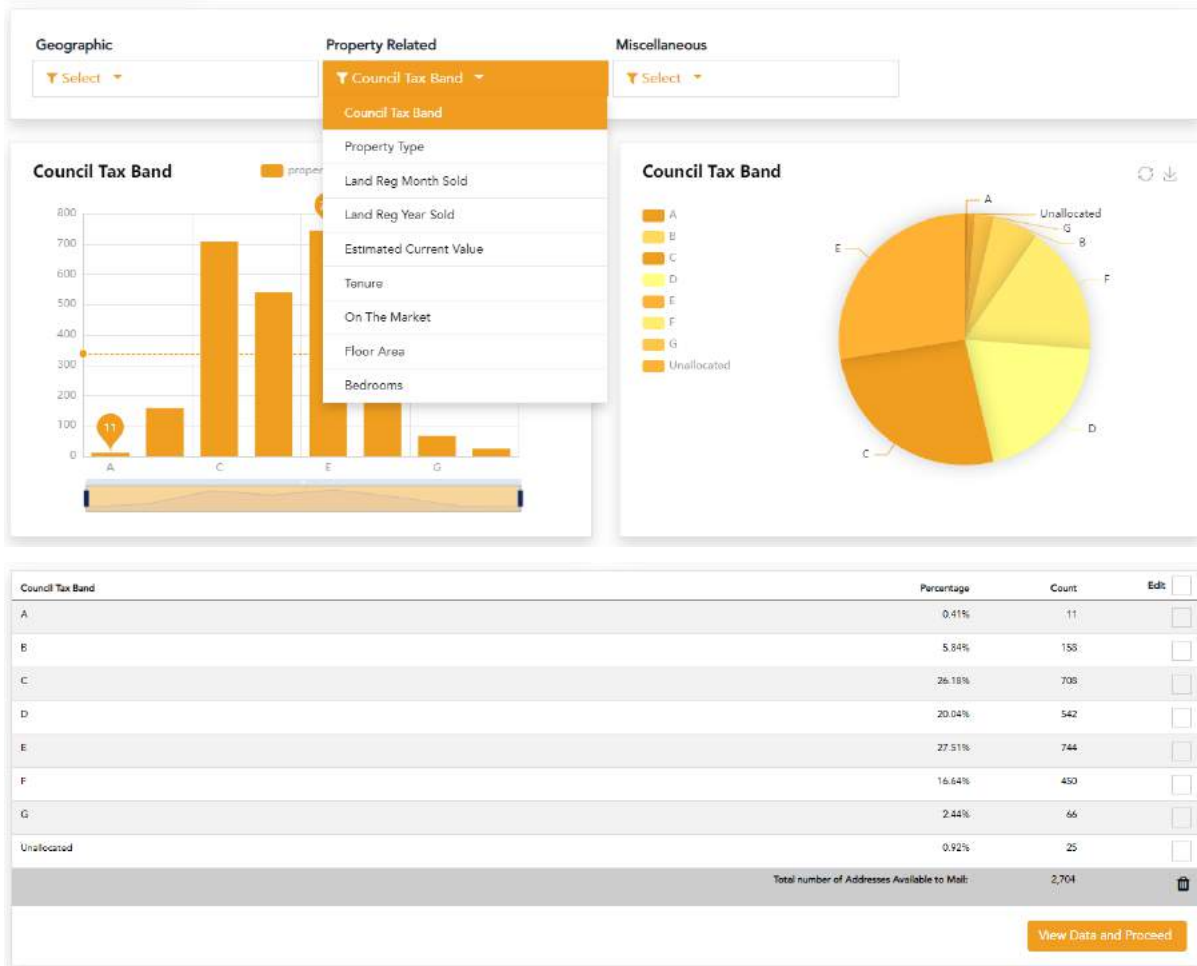


Once you have drawn your points you are able to save your polygon created to use again in the future. This is useful if you know certain areas or apartment blocks will be mailed often.

With both **list** and **map search**, once you have got your initial count that you are happy with, scroll to the refinement section, here you are able to refine your search if you wish to target the exact audience you are after.

Council tax bands, **property types**, private rentals and social housing in **tenure** (*whether a property is a private rental or owner occupied*) and number of **bedrooms** are some of the key features you may want to consider.

You simply select the records you wish to remove and click the bin icon; it will then instantly give you the updated count of properties available to mail, also updating the graphs above.



Council Tax Band	Percentage	Count	Edit
A	0.41%	11	<input type="checkbox"/>
B	5.84%	155	<input type="checkbox"/>
C	26.18%	708	<input type="checkbox"/>
D	20.04%	542	<input type="checkbox"/>
E	27.51%	744	<input type="checkbox"/>
F	16.64%	450	<input type="checkbox"/>
G	2.44%	66	<input type="checkbox"/>
Unallocated	0.92%	25	<input type="checkbox"/>
Total number of Addresses Available to Mail:		2,704	<input type="checkbox"/>

Once you are happy, click **View Data and Proceed**, and this will take you to an address list. If you wish to remove a property from that list; select the property then the bin icon.

NB: Suppressions are properties that you have marked at some point as **Do Not Send**. To review this list of properties select **Admin > Edits** from the menu bar

List of all properties in your selected area

3 Suppressions automatically removed Total available: 2,701

Search...

Add More Data Go Back Proceed to Templates

Detail	Address	Abode	House Name	House Number	Street	Locality	Town	Last Used	Status	
	The Resident			17	Kings Lane		Sutton		Available to Mail	<input type="checkbox"/>
	The Resident			19	Kings Lane		Sutton		Available to Mail	<input type="checkbox"/>
	The Resident			9	Kings Lane		Sutton		Available to Mail	<input type="checkbox"/>
	The Resident			11	Kings Lane		Sutton		Available to Mail	<input type="checkbox"/>
	The Resident			13	Kings Lane		Sutton		Available to Mail	<input type="checkbox"/>
	The Resident			15	Kings Lane		Sutton		Available to Mail	<input type="checkbox"/>
	The Resident			19a	Kings Lane		Sutton		Available to Mail	<input type="checkbox"/>
	The Resident	Flat 10	Ambrook Court	18	Kings Lane		Sutton		Available to Mail	<input type="checkbox"/>
	The Resident	Flat 9	Ambrook Court	18	Kings Lane		Sutton		Available to Mail	<input type="checkbox"/>
	The Resident	Flat 8	Ambrook Court	18	Kings Lane		Sutton		Available to Mail	<input type="checkbox"/>

Once happy click **Proceed to templates** and then select a template that is appropriate to your campaign.

There is a range of both postcard and letter mailings to use.

Postcards

SALES VALUATION AS ☆

Valuing in your home

Coming soon to Location for sales valuations

Use

LETTINGS VALUATIONS AS ☆

Valuing in your home

Coming soon to Location for lettings valuations

Use

SALES/LETTINGS VALUING IN ☆

VALUING IN YOUR HOME

Use

TENANTS WAITING 6 IMAGE ☆

LETtings valuations

Use

Letters

LIKELY MOVERS LETTER ☆

Use

MARKET APPRAISAL LETTER ☆

Use

PROPERTY REPORT LETTER 1 ☆

Use

PROPERTY REPORT LETTER 2 ☆

Use

To complete your order please click **Finish Design**. You will be taken to a final page where you are able to check your template, specification, price and add a Job reference.

If you are ready to proceed tick the box that you have checked the template and then click **Confirm Order** and it will then be sent to print via the Royal Mail.

*If you ever want to re-use the job in the future, it helps to add a reference that you will recognise. You can then retrieve the job by selecting **Admin > History > Jobs Printed***

Editing templates

When working on your template, all editable parts highlight in green and require a simple double tap to add the relevant edits required.

Postcode example



Front side



Reverse side

Letter example




The QR code you can see on mailouts, when scanned, will redirect the recipient to an individual Sprift property report.

On Market Prospecting

Properties FOR SALE and Properties TO LET


On-Market Opportunities



Properties FOR SALE

Send letters to properties currently FOR SALE with other agents to encourage vendors to consider all their options at major 'trigger points'.

New to Market (added over the previous 7 days), 4, 8, 12, 16, 20 + Weeks on the market, Sold (subject to contract), Price Reduction, Withdrawn... and more.



Properties TO LET

Send letters to properties currently TO LET with other agents to encourage vendors to consider all their options at major 'trigger points'.

Simply select the trigger points you wish to target.

This facility is used to send out branded and personalised mailings to properties currently on the market with other agents in your area.

We provide daily updated movers information determining the full address of all properties currently on the market with your competitors, cross referencing them against all the major property portals.



New Instruction
Last Updated: 21/02/2022

[+Add Address](#) [Filter](#)

Mailed	Address	Property Address	Locality	Sector	Price	Weeks	Current Agent	Select Template	Select Signoff	Mail
	The Homeow	17 Moorfield Craft	Yeading	LS19 6	£395,000	0	Hunters, Yeading, Cussey And Surrounding Areas	Sales New Instr	OTM Test	Mail
	The Homeowner	31 Woodlands Way	Whitman	LS14 2	£235,000	0	HouseSimple	Sales New Instr	OTM Test	Mail
	The Homeowner	8 Lebanon Court Richmond Road		TW1 3	£425,000	0	Chase Buchanan	Sales New Instr	OTM Test	Mail
	The Homeowner	21 Ingledeu Court		LS17 8	£100,000	0	Auction House London	Sales New Instr	OTM Test	Mail
	The Homeowner	7 Burton House Cockburn Close		LS11 5	£100,000	0	Whitegate	Sales New Instr	OTM Test	Mail

We track each property's sales or lettings cycle, allowing you to target vendors at specific trigger points.

For Sales Triggers this standardly includes:

- New Instruction
- Price Reduced
- 6 Weeks on the market
- 12 Weeks on the market
- 16 Weeks on the market
- Sold Withdrawn
- Withdrawn No Sale
- Fallen Through

For Lettings Triggers this standardly includes:

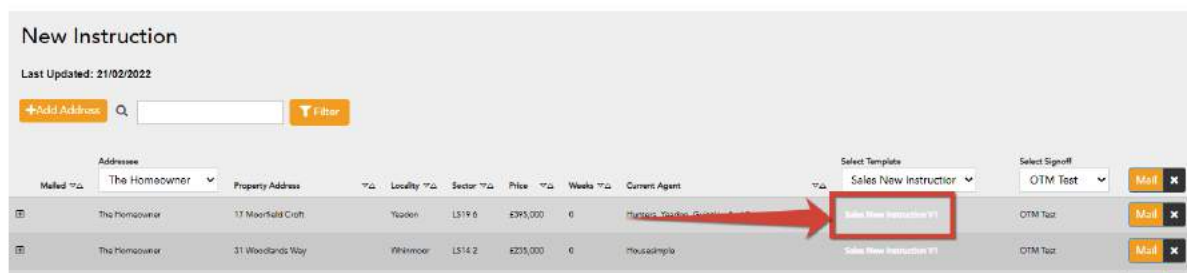
- New Instruction
- 3 Weeks on the market
- 6 Weeks on the market
- Price Reduction

All properties are selected for mailout by default. We recommend that you work your way through the triggers:

1. **Deselecting properties** you don't wish to mail by pressing the black **X**.
2. **Picking the appropriate template** (standardly there is a choice between a soft, moderate, and strong approach)
3. **Choosing the appropriate signature signoff** if you have a choice of more than one

***N.B** If you're not sure if a property is selected to mail, simply toggle back and forth between **X** and **Mail** and view the **Number of mailings** change at the bottom of the screen*

If you wish to proof a template, simply click on any of the templates next to their corresponding address to view what they will look like printed.



When you are ready to confirm your order, simply click **View order** to see a summary and then **Place order**. The selected properties will then be mailed within 5/6 working days via the Royal Mail.

Every Tuesday and Thursday you will be sent a trigger mailing email notification, informing you of the number of triggers you have available to mail in your area that day. You can click directly

from the email straight to this page to produce trigger mailings to send out to potential customers.

Your RECENT SALES and LETTINGS SUCCESSES



Your RECENT LETTING SUCCESSES

Mail homeowners surrounding your recently LET properties to tell them about your success so they might consider marketing their home with you.

Simply select address to be used as the centre point of each mailing from the automatically updated list of your most recently Let properties or add further addresses, choose the value of the surrounding targets, number of mailings and template required.



Your RECENT SALES SUCCESSES

Mail homeowners surrounding your recently SOLD properties to tell them about your success so they might consider marketing their home with you.

Simply select address to be used as the centre point of each mailing from the automatically updated list of your most recently Sold properties or add further addresses, choose the value of the surrounding targets, number of mailings and template required.

This is your 20/20 canvassing.

As you know this marketing strategy is aimed at creating new opportunities on the back of your last successful completion.

We will automatically list your recent successes here for you to build your campaign around; simply click to select. If there are other properties you'd like to build a campaign around you can manually enter the address in the top search bar.

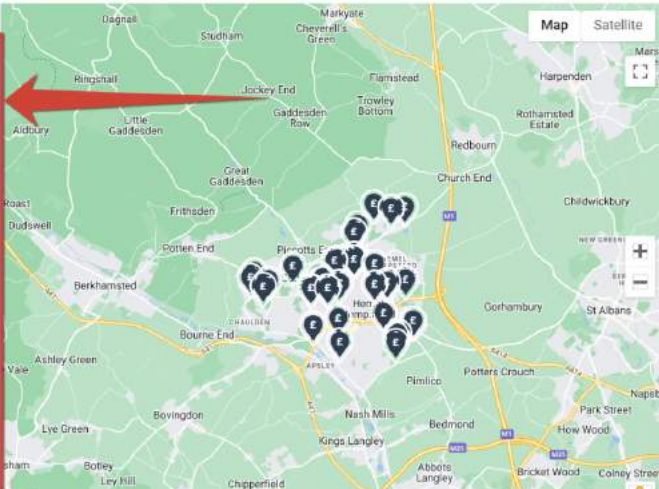
Add additional address to below list (if required)

Please enter a postcode... Confirm

You can upload multiple addresses in CSV format to use for the center of each mailing. Your addresses will be added to the current list.
Note: There is a limit of 500 rows, however we recommend uploading up to 100 rows at a time. [Upload a file](#)

37 Sold in your area campaigns Filter results

<input type="checkbox"/>	03/05/2022	20 Newford Close Hemel Hempstead HP2 4QZ	New
<input type="checkbox"/>	03/05/2022	12 Hales Park Hemel Hempstead HP2 4RH	New
<input type="checkbox"/>	03/05/2022	33 Paston Road Hemel Hempstead HP2 5AZ	New
<input type="checkbox"/>	03/05/2022	6 Hollybush Lane Hemel Hempstead HP1 2PF	New
<input type="checkbox"/>	03/05/2022	3 Fensomes Close Hemel Hempstead HP2 5DH	New
<input type="checkbox"/>	03/05/2022	14 Bowmans Court Hemel Hempstead HP2 5SD	New
<input type="checkbox"/>	03/05/2022	40 Stevenage Rise Hemel Hempstead HP2 6BH	New
<input type="checkbox"/>	03/05/2022	45 Burns Drive Hemel Hempstead HP2 7NP	New
<input type="checkbox"/>	03/05/2022	22 Nightingale Walk Hemel Hempstead HP2 7QX	New
<input type="checkbox"/>	03/05/2022	99 Ritcroft Street Hemel Hempstead HP3 8PE	New
<input type="checkbox"/>	03/05/2022	2 Shire Court Adeyfield Road Hemel Hempstead HP2 5PQ	New
<input type="checkbox"/>	03/05/2022	111 Downside Hemel Hempstead HP2 5PY	New
<input type="checkbox"/>	03/05/2022	17 Goosecroft Hemel Hempstead HP1 2PS	New



By default the system will target a radius of 250 properties closest to your recently sold listing, but you can take that all the way down to 30 or up to 2500.

Version 002

12/18

If you really want to be specific about who you are contacting you'd then use the filters, and then this quantity would be a max limit.

***N.B.** The blue tooltips icon will give you an indication of each filter's actions.*

Now you just have to pick your template, editing any areas that highlight in green.

Lastly you would need to **View order** and the **Confirm order** to send to print.

Sales Anniversaries



This section allows you to continue to maintain contact with vendors to celebrate important dates with them, reminding them that you are their personable local agent.

You can celebrate the anniversary of their purchase of their home, or send seasonal greetings

You are given simple criteria to help you identify properties based on the following:

Sales Agent: Select all properties, your own, or your competitors

Months Since Sold: 6 months all the way up to 5 years

Property Type: Specific property type

Current Estimated Value: An approximate value of the property

You also have the option to manually add in the address of a property if needed

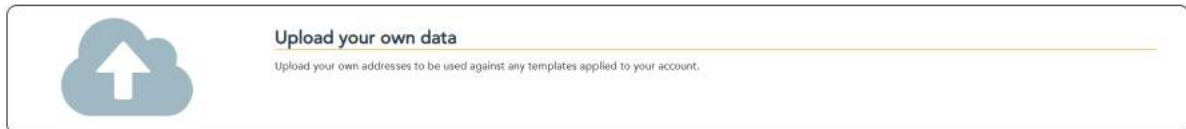
This section works in a very similar way to the On Market triggers section.
All properties are selected for mailout by default.

1. **Deselecting properties** you don't wish to mail by unchecking the orange box
2. **Picking the appropriate template**
3. **Choosing the appropriate signature signoff** if you have a choice of more than one

If you wish to proof a template, simply click on any of the templates next to their corresponding address to view what they will look like printed.

Upload your own data

There is a wealth of data within your agency's CRM database, that you can use the print functionality to contact. Perhaps property appraisals you've attended that you know never went to market.



In order for SmartMail to recognise the data from your CRM you will need to format it in a specific way.

How do you format it?

The data needs to be in the form of a .csv file and most CRMs will have a function allowing you to **Export as .csv** (contact your CRM support team if you require assistance with this).

1. **Choose a data template.** This will be the way in which you match the CRM data with SmartMail

There are 2 options:

Consumer data 1 sample: Includes column "FullName"

Title	Initial	Surname	FullName	Abode	House Name	No and Street	District/Area	Town	Postcode
Mr	A	Example		Flat 4	Ivy House	15 The Close	Main Road	Anytown	AN1 1TN
Miss	B	Example 2		Flat 5	Ivy House	16 The Close	Main Road	Anytown	AN1 1TN

Consumer data 2 sample: Excludes column "FullName" includes column "DomicileID"

Title	Initial	Surname	Abode	House Name	No and Street	District/Area	Town	Postcode	DomicileID
Mr	A	Example	Flat 4	Ivy House	15 The Close	Main Road	Anytown	AN1 1TN	PCODE1
Mrs	Brenda	Instance			45 Church Street		Another town	AT44 3AZ	PCODE2

Note that there are slightly different column headers. Pick the template that resembles the data you have in your CRM.

2. **Download your template.** Clicking this button will download the template as a .csv file with the column headers arranged as shown in option 1 or 2.
3. **Add your CRM data to the SmartMail template.** Cut and paste your data into the correct columns as appropriate and save.

4. **Remove any special characters from the saved filename.** ie; /,+,",*. Close Excel when complete.
5. **Upload your Data.** Browse to your newly formatted address file and open. When uploaded addresses will be shown.

N.B. your data is not stored on the platform once a campaign is completed.

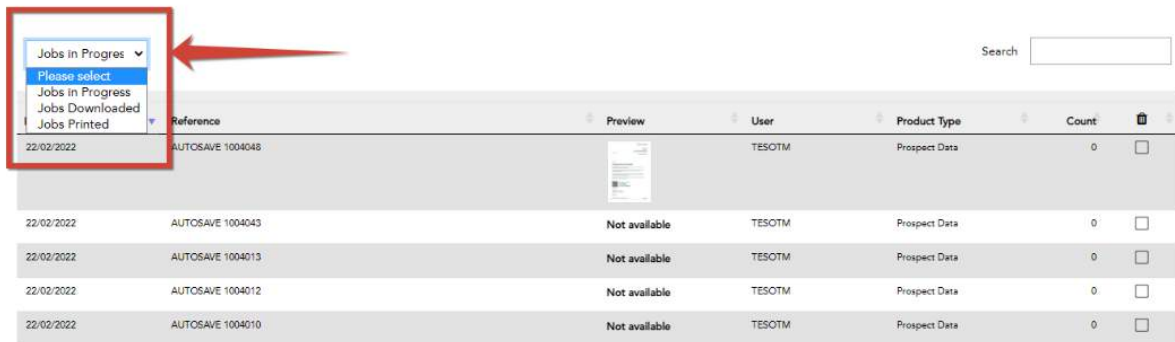
6. **Proceed to create material for mail outs.**


Admin

History

Within the History facility there are two sections of importance:

Jobs In Progress



Reference	Preview	User	Product Type	Count	
22/02/2022		TESOTM	Prospect Data	0	<input type="checkbox"/>
22/02/2022	Not available	TESOTM	Prospect Data	0	<input type="checkbox"/>
22/02/2022	Not available	TESOTM	Prospect Data	0	<input type="checkbox"/>
22/02/2022	Not available	TESOTM	Prospect Data	0	<input type="checkbox"/>
22/02/2022	Not available	TESOTM	Prospect Data	0	<input type="checkbox"/>

Here you will find all the incomplete jobs that haven't yet been sent to print.

You can click back into any of these jobs by clicking on their **Reference** and finish or further edit prior to completing and mailing out.

Jobs Printed

You will find all the campaigns that have successfully been sent to print here.

If you want to 'reuse' a previous campaign, simply click and proceed to complete a similar campaign using the same data or template or making small tweaks as necessary

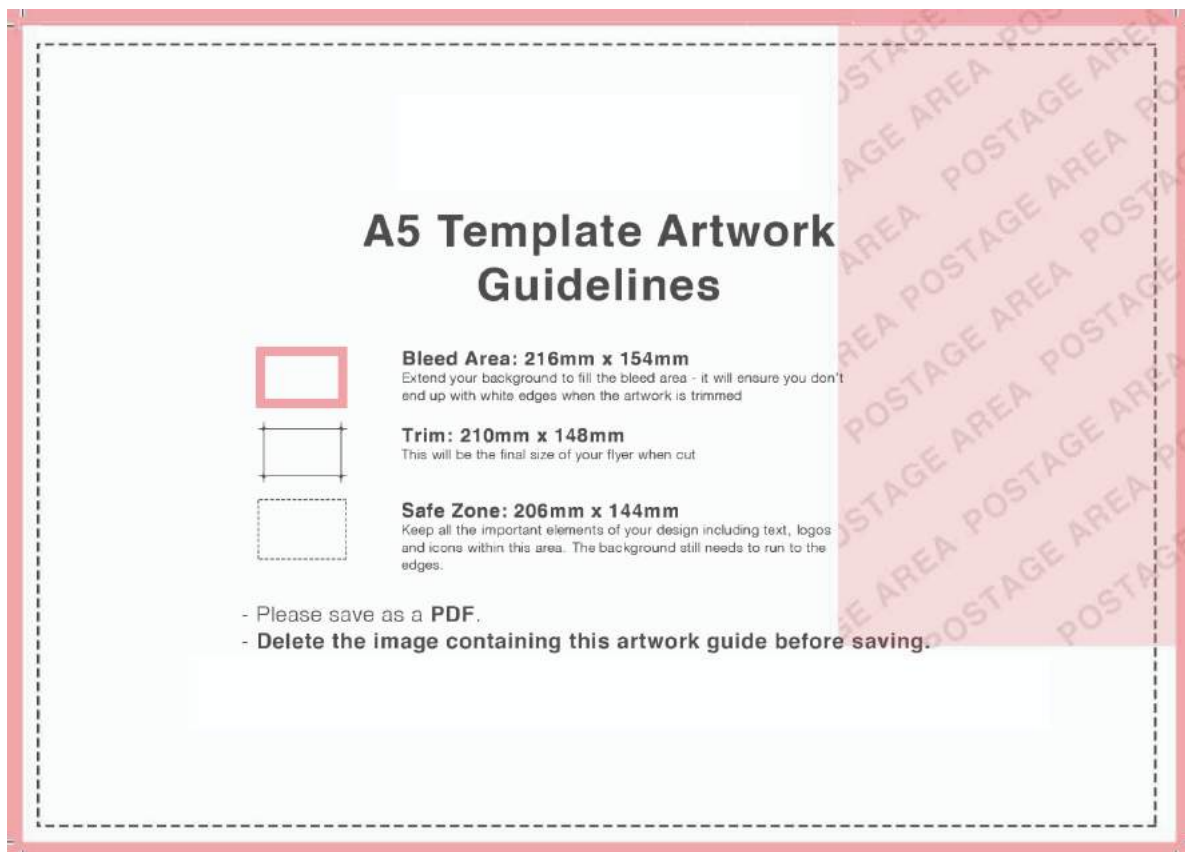
Template Guideline

Custom Templates

The suite of mailout material provided by default has been carefully considered to convey the correct tone and message. However if there is specific wording or perhaps a branded letterhead that you'd prefer to use, please forward to support@onthemarket.com and allow up to 5 working days for these to be added.

With templates our preference for finished artwork is that you send across a print ready PDF to our team via email. However, photoshop files and InDesign files can also be sent across.

Our preference is that artwork is provided without crop marks but with bleed, please follow the guide below.



Images should be at least 300dpi however all of the templates flag with the user if the image isn't of good enough quality before proceeding to print.