

Creating an Entry in the CRM Calendar and Configuring the CRM Calendar



This guide provides a walkthrough for creating and configuring entries in the CRM Calendar, essential for managing appointments and schedules in real estate. It covers adding appointments, filtering views, and customising the calendar. It also includes tips for integrating with Outlook and Google calendars, helping users sync events across platforms. Viewing this guide will help streamline calendar management and boost productivity within the CRM system.

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

iam property

My day Lettings ▾ Sales ▾ Accounts ▾ Reporting ▾ Communications ▾

My account

Welcome back, Training

+ Add New Record

View Property Management

Visit Help Centre

Search all records

Today's events

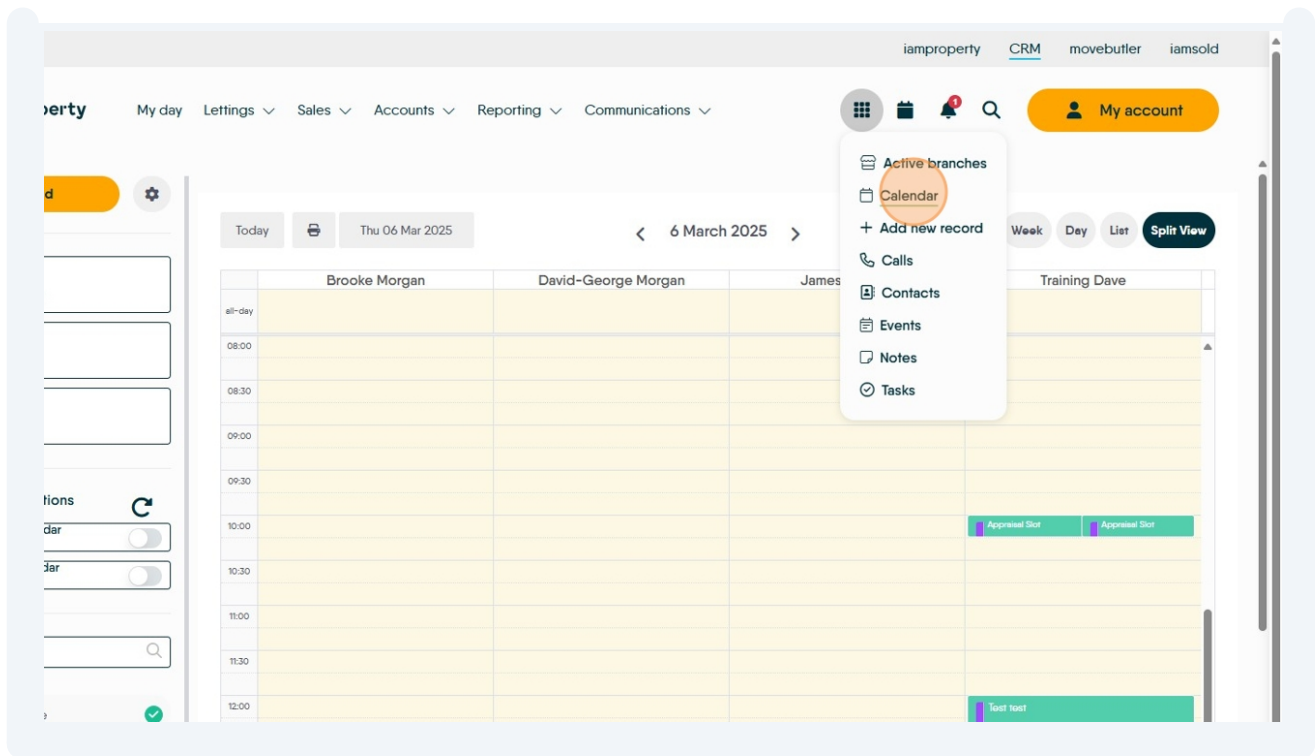
Time	Name
12:00	Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025

2 Click "Calendar" or Click here then click "Calendar"

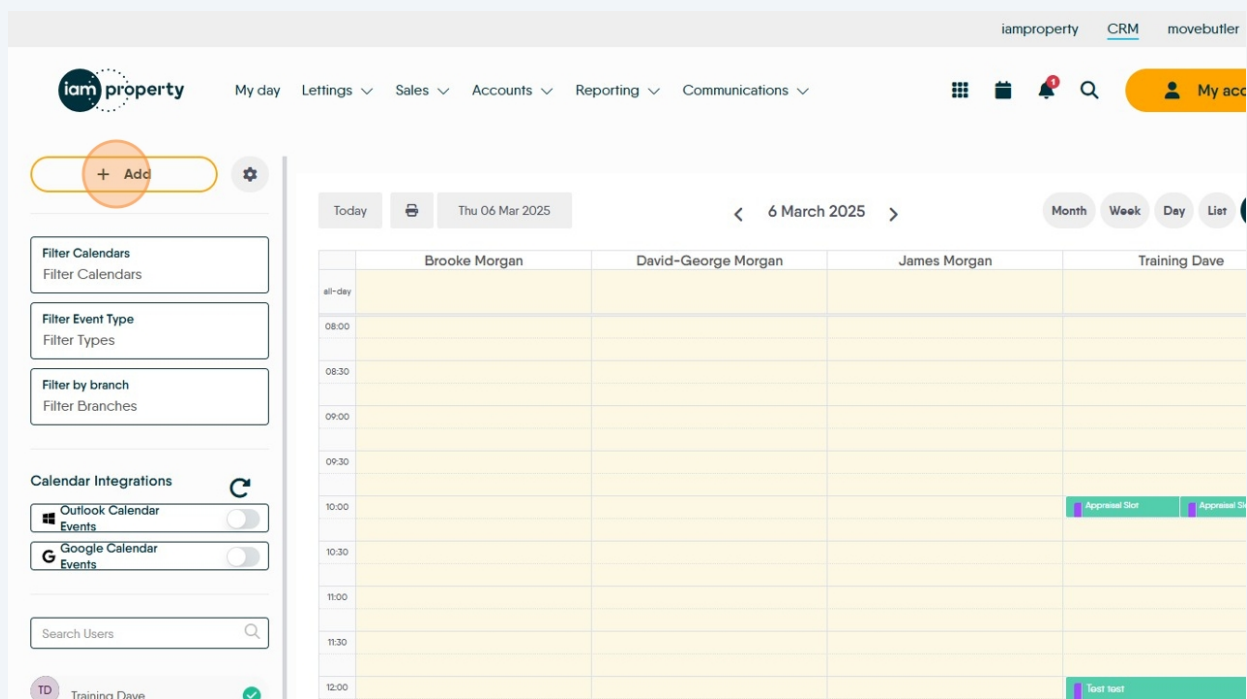
2



Adding a Calendar Entry

- There are 2 options to add an entry to the CRM Calendar.

Click "Add" then from the options select the type of appointment you want to create.



iam property

My day

Lettings

Sales

Accounts

Reporting

Communications

My acc

+ Add

New Appointment +

New Check-In +

New Checkout +

New Inventory +

New Inspection +

New Appraisal (Sales) +

New Appraisal (Lettings) +

New Viewing (Sales) +

New Viewing (Lettings) +

New Viewing Open House (Sales) +

New Viewing Open House (Lettings) +

Filter Calendars

Filter Calendars

Today

Thu 06 Mar 2025

< 6 March 2025 >

Month

Week

Day

List

	Brooke Morgan	David-George Morgan	James Morgan	Training Dave
all-day				
08:00				
08:30				
09:00				
09:30				
10:00				Appraisal Slot
10:30				Appraisal Slot
11:00				
11:30				
12:00				Test test
12:30				

4 Alternatively, right-click on the date, time that you wish to create the appointment.

Add

Appointment +

w Check-In +

w Checkout +

w Inventory +

r Inspection +

ppraisal (Sales) +

ppraisal (Lettings) +

iewing (Sales) +

ewing (Lettings) +

g Open House (Sales) +

Open House (Lettings) +

ars

ndars

type

s

Today

Thu 06 Mar 2025

< 6 March 2025 >

Month

Week

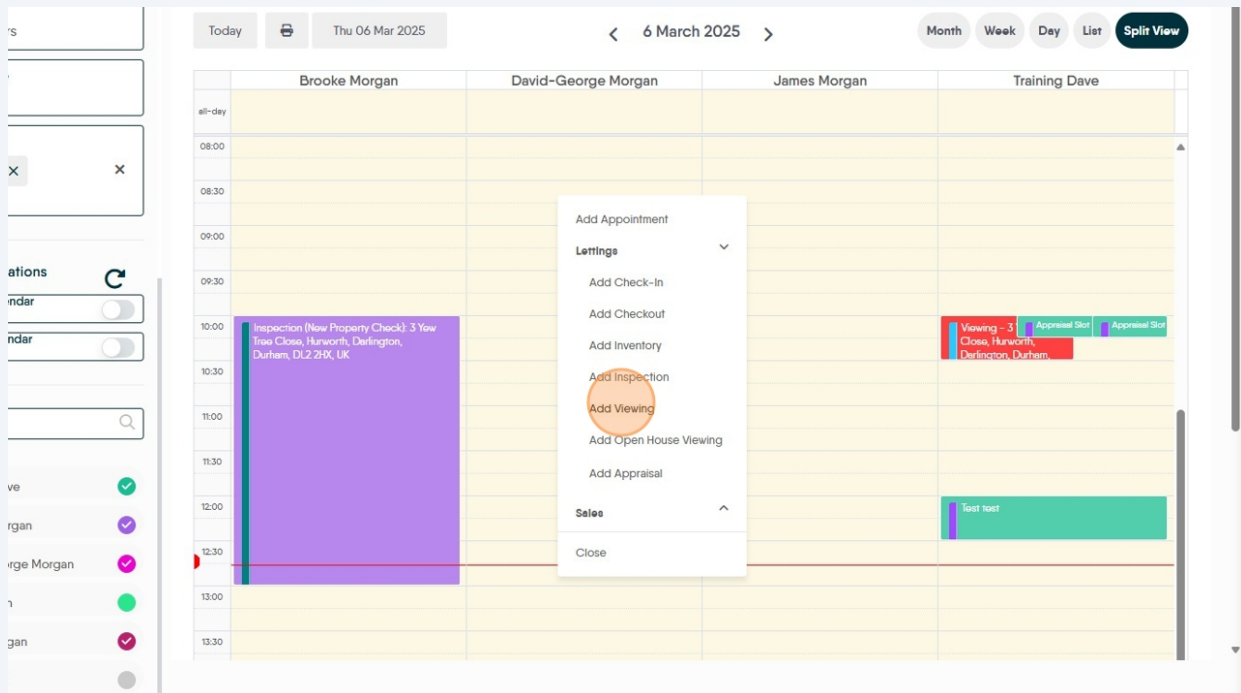
Day

List

Spir View

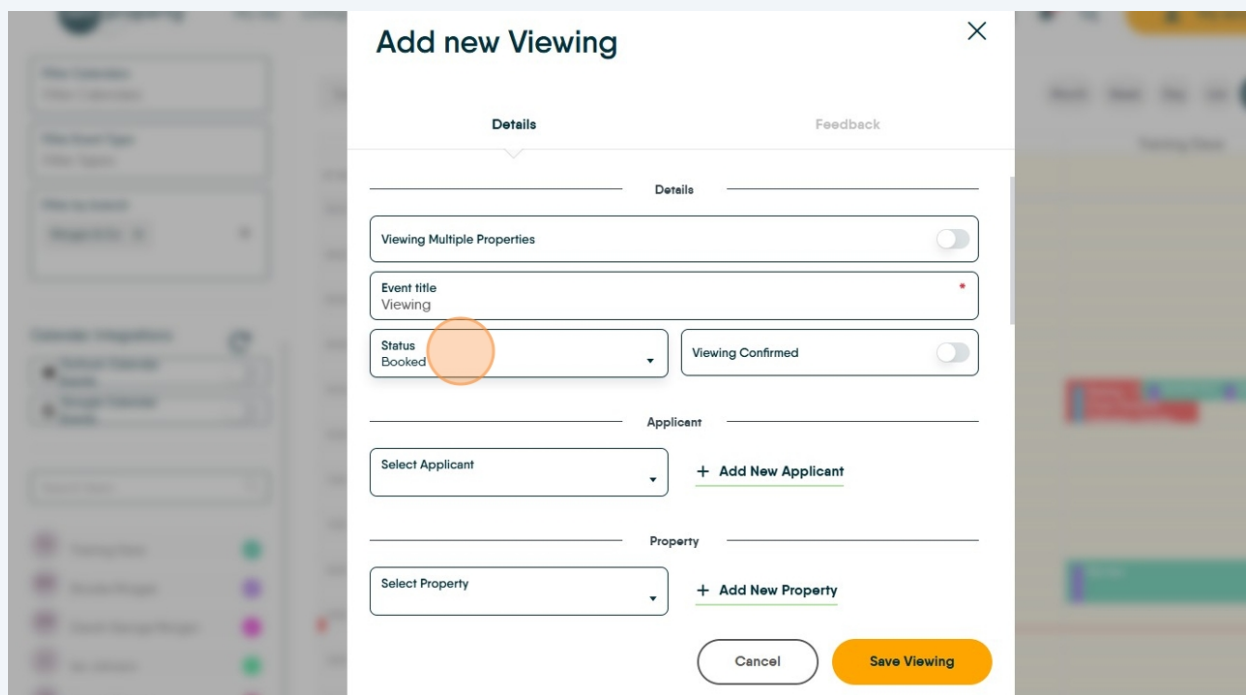
	Brooke Morgan	David-George Morgan	James Morgan	Training Dave
all-day				
08:30				
09:00				
09:30				
10:00	Inspection (New Property Check): 3 Yaw Tree Close, Hunworth, Darlington, Durham, DL2 2HX, UK			Viewing - 3 Yaw Tree Close, Hunworth, Darlington, Durham, DL2 2HX
10:30				Appraisal Slot
11:00				Appraisal Slot
11:30	Viewing - 3 Yaw Tree Close		Viewing - 3 Yaw Tree Close, Hunworth, Darlington, Durham, DL2 2HX	
12:00				Test test
12:30				
13:00				
13:30				

5 Select the appointment type from the drop down list.



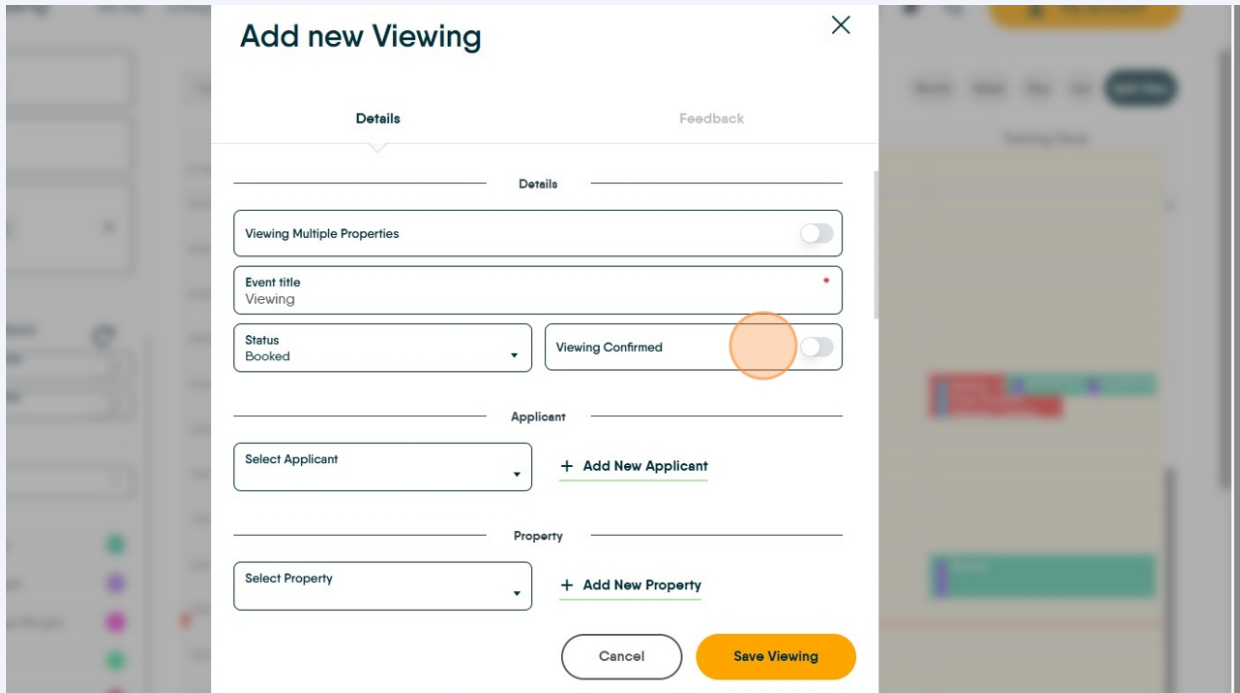
6 In this example we are using 'Viewing'.

Select the appropriate option from the "Status" menu option.



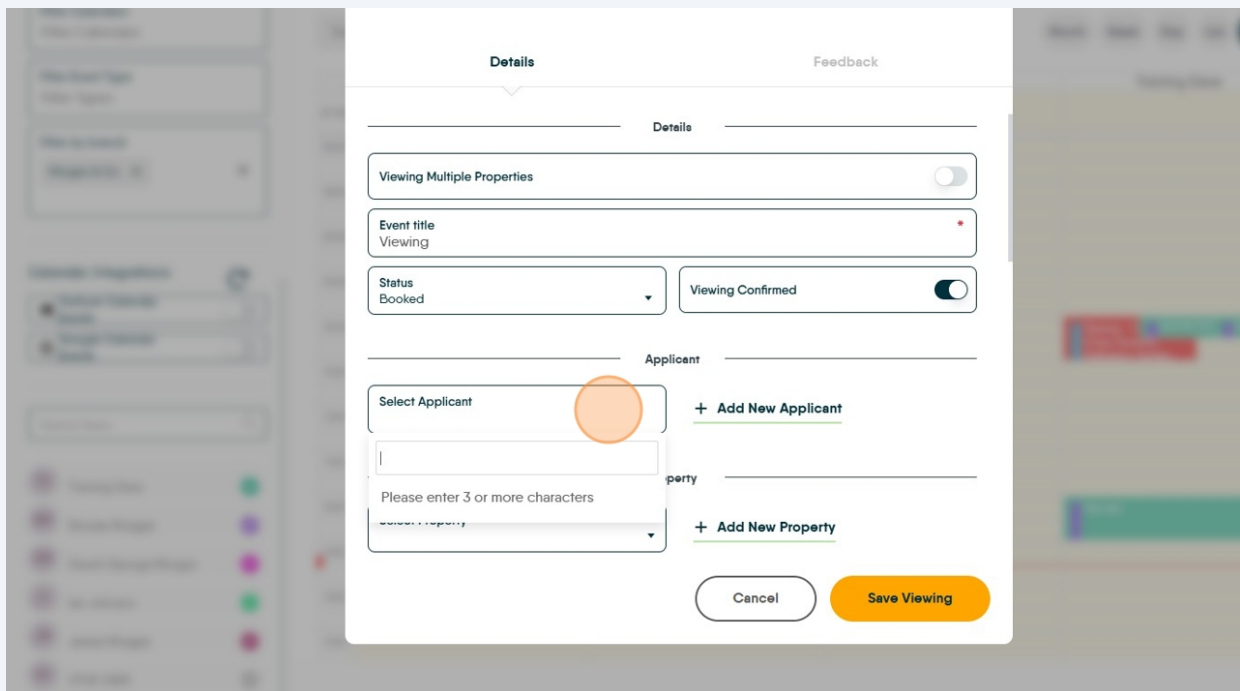
- 7 Click "Viewing Confirmed" if the viewing has been confirmed.

If not confirmed the viewing will show in the calendar in red, and will show as unconfirmed in the Applicant and Property records.



The screenshot shows the 'Add new Viewing' form with a 'Details' tab selected. The form includes a toggle for 'Viewing Multiple Properties', an 'Event title' field with the value 'Viewing', a 'Status' dropdown set to 'Booked', and a 'Viewing Confirmed' toggle which is highlighted with an orange circle. Below these are sections for 'Applicant' (with a 'Select Applicant' dropdown and '+ Add New Applicant' link) and 'Property' (with a 'Select Property' dropdown and '+ Add New Property' link). At the bottom are 'Cancel' and 'Save Viewing' buttons.

- 8 Click here to search for or add the applicant.



This screenshot shows the same 'Add new Viewing' form, but the 'Select Applicant' dropdown in the 'Applicant' section is highlighted with an orange circle. The dropdown menu is open, showing a search bar with the placeholder text 'Please enter 3 or more characters' and a list of applicant names. The 'Viewing Confirmed' toggle is now turned on. The '+ Add New Applicant' and '+ Add New Property' links are also visible.

9

Click here to search for the Property. A new property can be added from here as well.

The screenshot shows the 'Add new Viewing' form with the 'Details' tab selected. The 'Property' section has a 'Select Property' dropdown menu with a search input field. An orange circle highlights the search input field. Below the search input is a message: 'Please enter 3 or more characters'. To the right of the search input is a '+ Add New Property' link. Below the search input are four buttons: 'Add new call', 'Send SMS', 'Send Email', and 'Contact Tenants'.

10

The details of the property plus the Vendor/Landlord will also show.

The 'Send Email' 'Send SMS' options can be used to send notifications.

The screenshot shows the 'Add new Viewing' form with the 'Details' tab selected. The 'Property' section has a 'Select Property' dropdown menu with a search input field. An orange circle highlights the search input field. Below the search input is a message: 'Please enter 3 or more characters'. To the right of the search input is a '+ Add New Property' link. Below the search input are four buttons: 'Add new call', 'Send SMS', 'Send Email', and 'Contact Tenants'. The 'Appointment' section has 'Start Time' and 'End Time' fields, both set to 'Thu 06 Mar 2025 11:30' and 'Thu 06 Mar 2025 12:00' respectively. Below the 'Appointment' section is a 'Select Calendar' dropdown menu with 'Lettings' selected. At the bottom of the form are 'Cancel' and 'Save Viewing' buttons.

11

If you have right clicked on the calendar to create the appointment the time and date will be pre-set, if you haven't used that route, add the date and time here.

The screenshot shows a mobile application interface for adding a new viewing appointment. The form is titled "Add new Viewing" and has a close button (X) in the top right corner. Below the title, there are two tabs: "Details" (selected) and "Feedback". The "Appointment" section contains the following fields:

- Start Time:** A text input field with the value "Thu 06 Mar 2025 11:30". An orange circle highlights the red asterisk icon to the right of the field.
- End Time:** A text input field with the value "Thu 06 Mar 2025 12:00".
- Date Picker:** A calendar view for March 2025. The date "6" (Thursday) is selected and highlighted in blue. The calendar shows days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and dates (1-31).
- Accompanied:** A toggle switch labeled "Accompanied" which is currently turned off.

The background of the image is a blurred view of the application's main screen, showing a list of appointments and a sidebar menu.

12 Complete the additional fields as required.

Calendar will be set based on the type of appointment you are creating. Set any reminders you want.

Details Feedback

Appointment

Start Time Thu 06 Mar 2025 11:30

End Time Thu 06 Mar 2025 12:00

Select Calendar Lettings

Reminder

Assign to users James Morgan

Select Branch Morgan & Co

Accompanied

Meet At

Cancel Save Viewing

13 Assign to Users will be set from the Calendar you are using, however this allows you to assign the appointment to any user or multiple users. Click "Brooke Morgan"

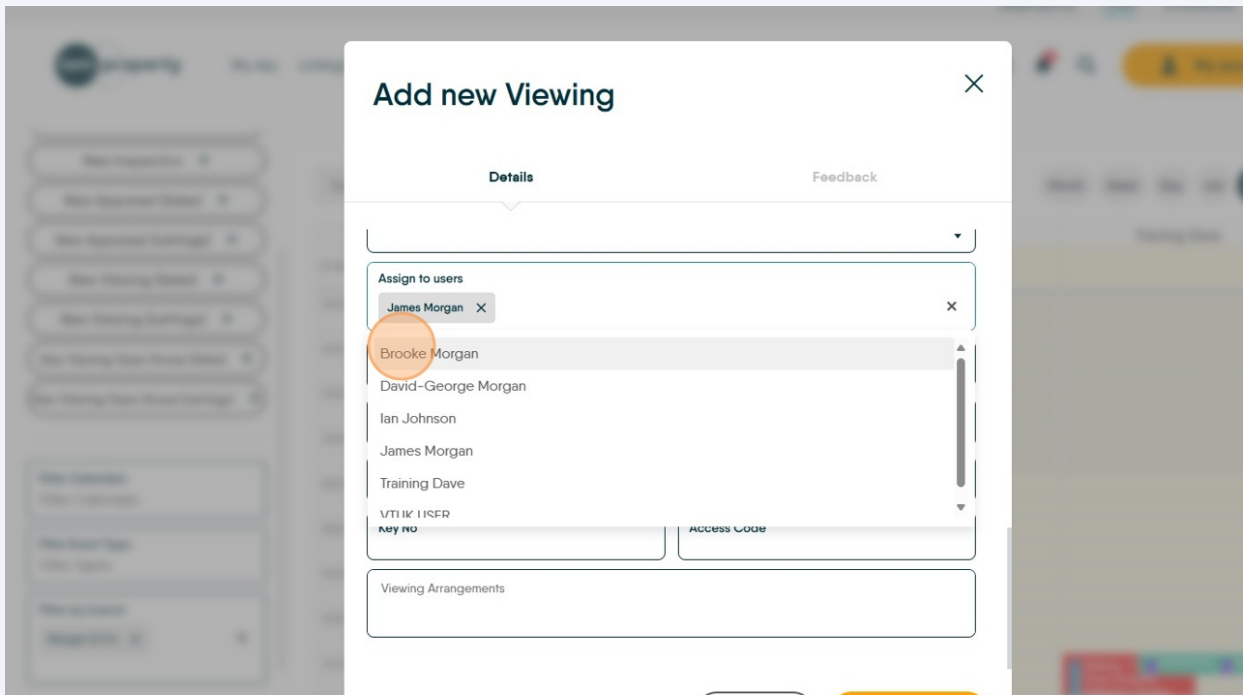
Add new Viewing

Details Feedback

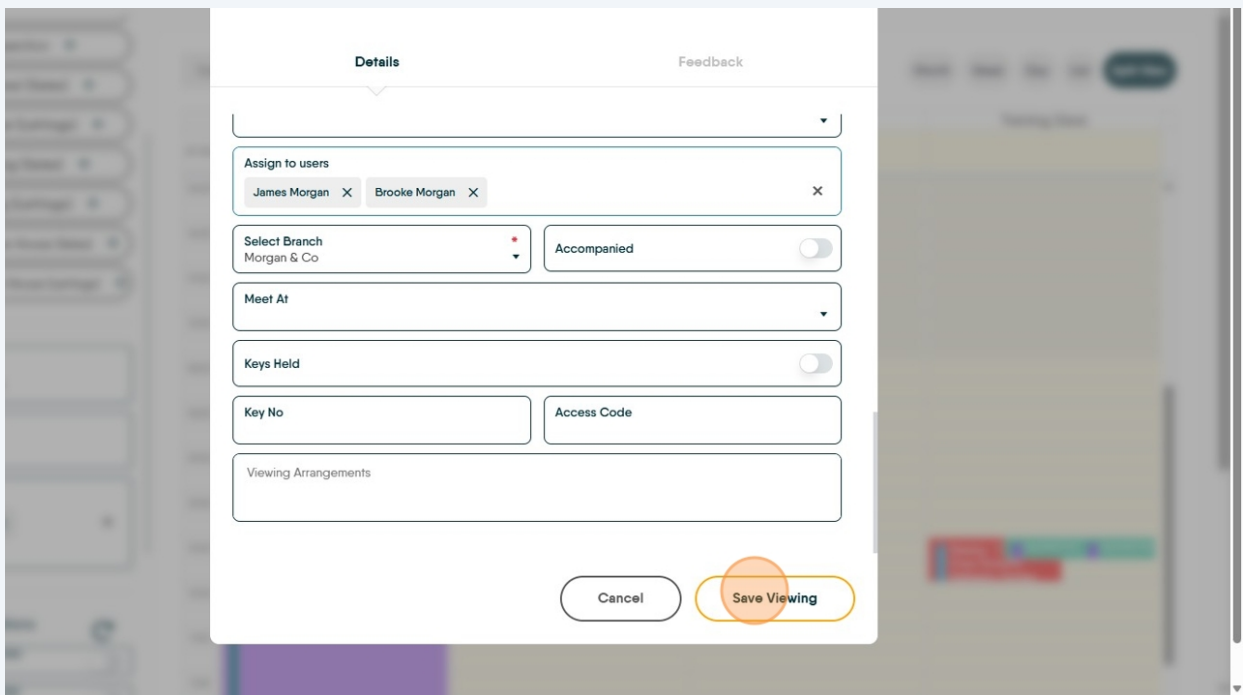
Assign to users James Morgan Brooke Morgan David-George Morgan Ian Johnson James Morgan Training Dave

Access Code

Viewing Arrangements

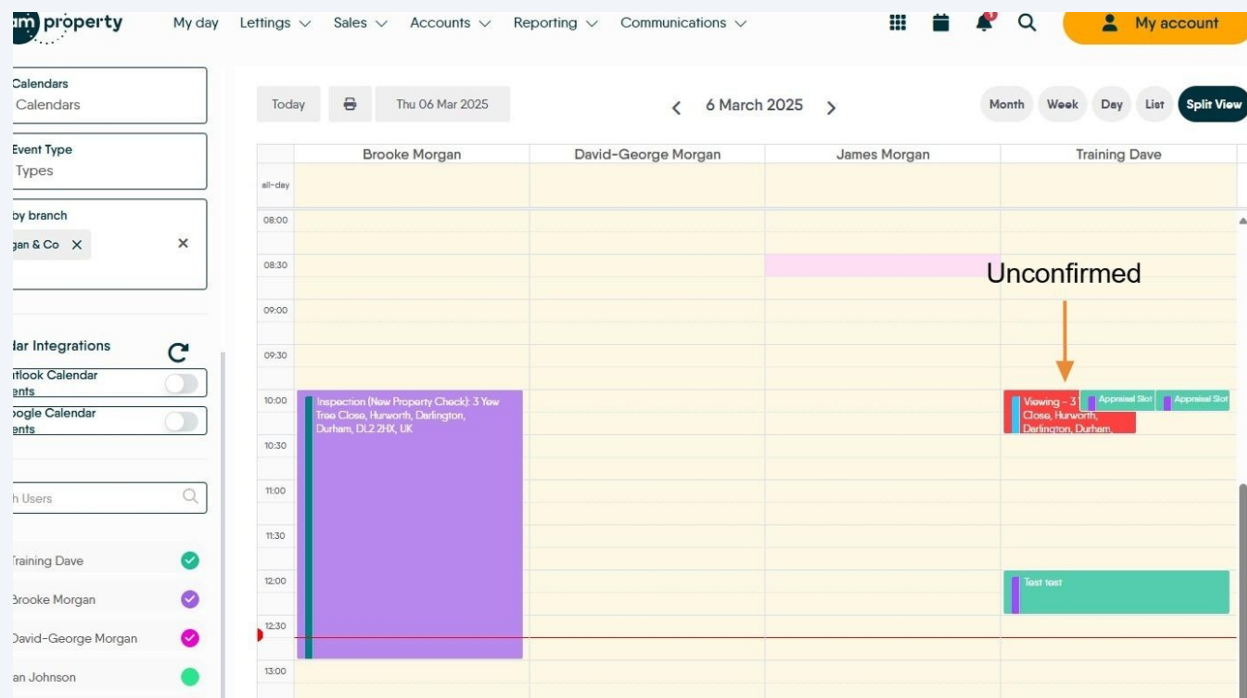


14 Click "Save Viewing"



15 The appointment will then show in the Calendar.

You can see an unconfirmed appointment shown in red and a confirmed appointment in the colour allocated to that user.



Managing Calendars

16 You can filter the calendars to just see the calendar you want.

Click the "Filter Calendars" field.
Click option from the drop down menu.

New Appraisal (Lettings) +

New Viewing (Sales) +

New Viewing (Lettings) +

New Viewing Open House (Sales) +

New Viewing Open House (Lettings) +

Filter Calendars

Filter Calendars

Sales

Lettings

Annual Leave

Calendar Integrations

Outlook Calendar Events

Google Calendar Events

Search Users

Today

Thu 06 Mar 2025

< 6 March 2025 >

Month Week Day List

	Brooke Morgan	David-George Morgan	James Morgan	Training Dave
all-day				
08:00				
08:30				
09:00				
09:30				
10:00				Appraisal Slot
10:30				
11:00				
11:30				
12:00				Test test
12:30				
13:00				
13:30				

New Appraisal (Lettings) +

New Viewing (Sales) +

New Viewing (Lettings) +

New Viewing Open House (Sales) +

New Viewing Open House (Lettings) +

Filter Calendars

Filter Calendars

Sales

Lettings

Annual Leave

Calendar Integrations

Outlook Calendar Events

Google Calendar Events

Search Users

Today

Thu 06 Mar 2025

< 6 March 2025 >

Month Week Day List

	Brooke Morgan	David-George Morgan	James Morgan	Training Dave
all-day				
08:00				
08:30				
09:00				
09:30				
10:00				Appraisal Slot
10:30				
11:00				
11:30				
12:00				Test test
12:30				
13:00				
13:30				

17

Click the "Filter Types" field to filter by specific appointment types. Click here.

New Appraisal (Lettings) +

New Viewing (Sales) +

New Viewing (Lettings) +

New Viewing Open House (Sales) +

New Viewing Open House (Lettings) +

Filter Calendars
Filter Calendars

Filter Event Type
Filter Types

Filter by branch
Filter Branches

Calendar Integrations

Outlook Calendar Events

Google Calendar Events

Search Users

Today

Thu 06 Mar 2025

< 6 March 2025 >

Month Week Day List

	Brooke Morgan	David-George Morgan	James Morgan	Training Dave
all-day				
08:00				
08:30				
09:00				
09:30				
10:00				Appraisal Slot
10:30				
11:00				
11:30				
12:00				Test test
12:30				
13:00				
13:30				

New Appraisal (Lettings) +

New Viewing (Sales) +

New Viewing (Lettings) +

New Viewing Open House (Sales) +

New Viewing Open House (Lettings) +

Filter Calendars
Filter Calendars

Filter Event Type
Filter Types

Appointment

Appraisal

Check-in

Checkout

Inventory

Interaction Events

Search Users

Today

Thu 06 Mar 2025

< 6 March 2025 >

Month Week Day List

	Brooke Morgan	David-George Morgan	James Morgan	Training Dave
all-day				
08:00				
08:30				
09:00				
09:30				
10:00				Appraisal Slot
10:30				
11:00				
11:30				
12:00				Test test
12:30				
13:00				
13:30				

- Click the "Filter Branches" field to filter by specific branch. Click "Morgan & Co"

- New Appraisal (Lettings) +
- New Viewing (Sales) +
- New Viewing (Lettings) +
- New Viewing Open House (Sales) +
- New Viewing Open House (Lettings) +

Filter Calendars
Filter Calendars

Filter Event Type
Filter Types

Filter by branch
Filter Branches

Calendar Integrations

Outlook Calendar Events

Google Calendar Events

Search Users

Today Thu 06 Mar 2025

< 6 March 2025 >

Month Week Day List

	Brooke Morgan	David-George Morgan	James Morgan	Training Dave
all-day				
08:00				
08:30				
09:00				
09:30				
10:00				Appraisal Slot
10:30				Appraisal Slot
11:00				
11:30				
12:00				Test test
12:30				
13:00				
13:30				

- New Appraisal (Lettings) +
- New Viewing (Sales) +
- New Viewing (Lettings) +
- New Viewing Open House (Sales) +
- New Viewing Open House (Lettings) +

Filter Calendars
Filter Calendars

Filter Event Type
Filter Types

Filter by branch
Filter Branches

- Anna Estates
- Estate management
- Henry & Co
- Morgan & Co
- Morgan&Co MB
- Rennett & Partners

Search Users

Today Thu 06 Mar 2025

< 6 March 2025 >

Month Week Day List

	Brooke Morgan	David-George Morgan	James Morgan	Training Dave
all-day				
08:00				
08:30				
09:00				
09:30				
10:00				Appraisal Slot
10:30				Appraisal Slot
11:00				
11:30				
12:00				Test test
12:30				
13:00				
13:30				

19

You can also opt to show selected colleagues calendars on your calendar. Select the specific Users whose calendar you want to see.

The screenshot shows a calendar interface with a sidebar on the left containing several filter sections:

- Filter Calendars:** A section with a "Filter Calendars" button.
- Filter Event Type:** A section with a "Filter Types" button.
- Filter by branch:** A section showing "Morgan & Co" with a close button (X).
- Calendar Integrations:** A section with toggle switches for "Outlook Calendar Events" and "Google Calendar Events".
- Search Users:** A search bar with a magnifying glass icon.
- User List:** A list of users with their initials and names, each with a selection circle and a checkmark:
 - TD Training Dave (green checkmark)
 - BM Brooke Morgan (orange circle, highlighted)
 - DM David-George Morgan (purple checkmark)
 - IJ Ian Johnson (green circle)
 - JM James Morgan (purple checkmark)
 - VU VTUK USER (grey circle)

The main calendar area on the right shows a grid for the week of March 3rd to 9th, 2025. A red line indicates the current time is 12:30. A green event titled "Test test" is visible on the 8th of March.

20

There are also options on what information you see on the screen. Click "Month" to see a month view
 Click "Week" to see the whole week
 Click "Split View" to see individual calendars for each users you have selected.

The screenshot shows a calendar interface with a top navigation bar and a sidebar on the left. The top navigation bar includes links for "iamproperty", "CRM", "movebutler", and "iamsold". The sidebar on the left contains a search bar and a list of users with their initials and names, each with a selection circle and a checkmark:

- TD Training Dave (green checkmark)
- BM Brooke Morgan (orange circle, highlighted)
- DM David-George Morgan (purple checkmark)
- IJ Ian Johnson (green circle)
- JM James Morgan (purple checkmark)
- VU VTUK USER (grey circle)

The main calendar area on the right shows a grid for the week of March 3rd to 9th, 2025. A red line indicates the current time is 12:30. A green event titled "Test test" is visible on the 8th of March. The view is set to "Month" (highlighted in orange), with other options like "Week", "Day", "List", and "Split View" available. The "Split View" option is highlighted in dark blue.

iamproperty
CRM
movebutler
iamsold

iamproperty
My day
Lettings
Sales
Accounts
Reporting
Communications

My account

Today
March 2025
Month
Week
Day
List
Split View

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
24 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise +2 more	25 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise +4 more	26 00:00 – 12:00 Inspect 00:00 – 12:00 Inspect +5 more	27 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	28 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	1 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	2 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test
3 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	4 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	5 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	6 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	7 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	8 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	9 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test
10 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	11 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	12 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	13 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	14 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	15 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test	16 10:00 – 10:15 Appraise 10:00 – 10:15 Appraise 12:00 – 12:30 Test test
17 10:00 – 10:15 Appraise	18 10:00 – 10:15 Appraise	19 10:00 – 10:15 Appraise	20 10:00 – 10:15 Appraise	21 10:00 – 10:15 Appraise	22 10:00 – 10:15 Appraise	23 10:00 – 10:15 Appraise

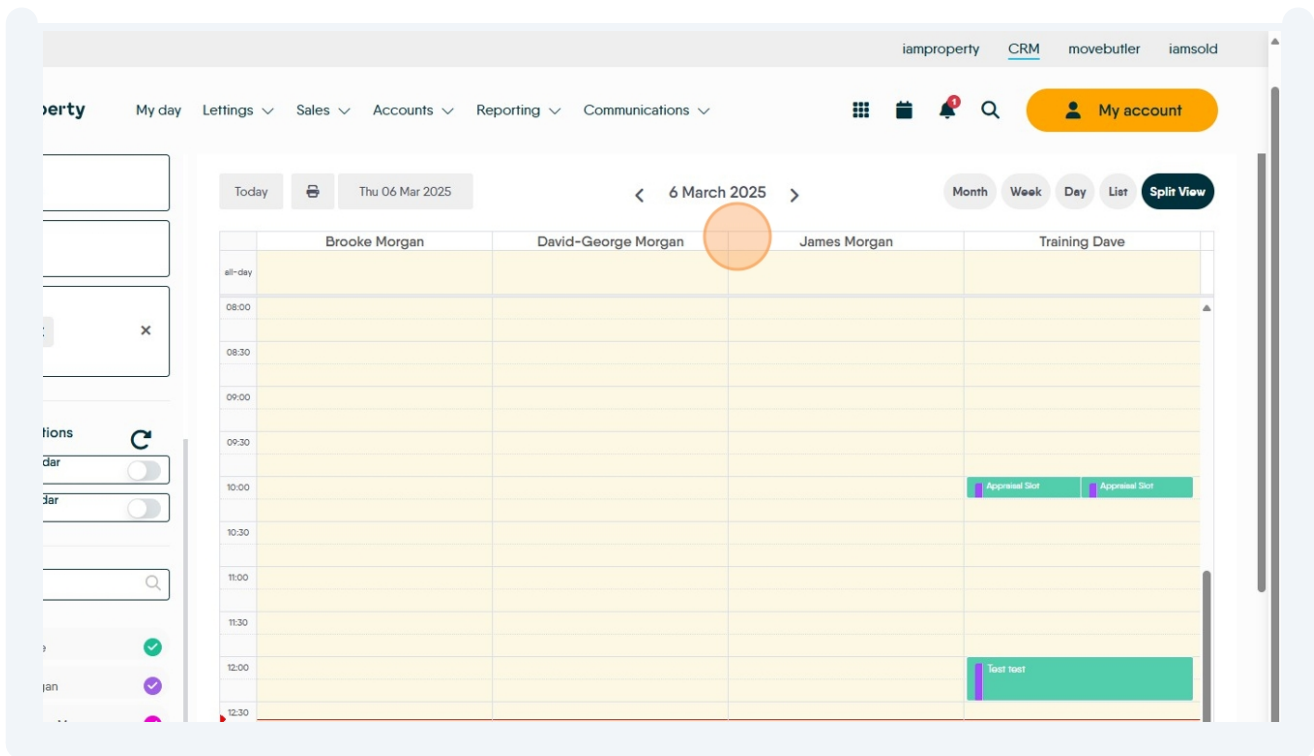
iamproperty
CRM
movebutler
iamsold

iamproperty
My day
Lettings
Sales
Accounts
Reporting
Communications

My account

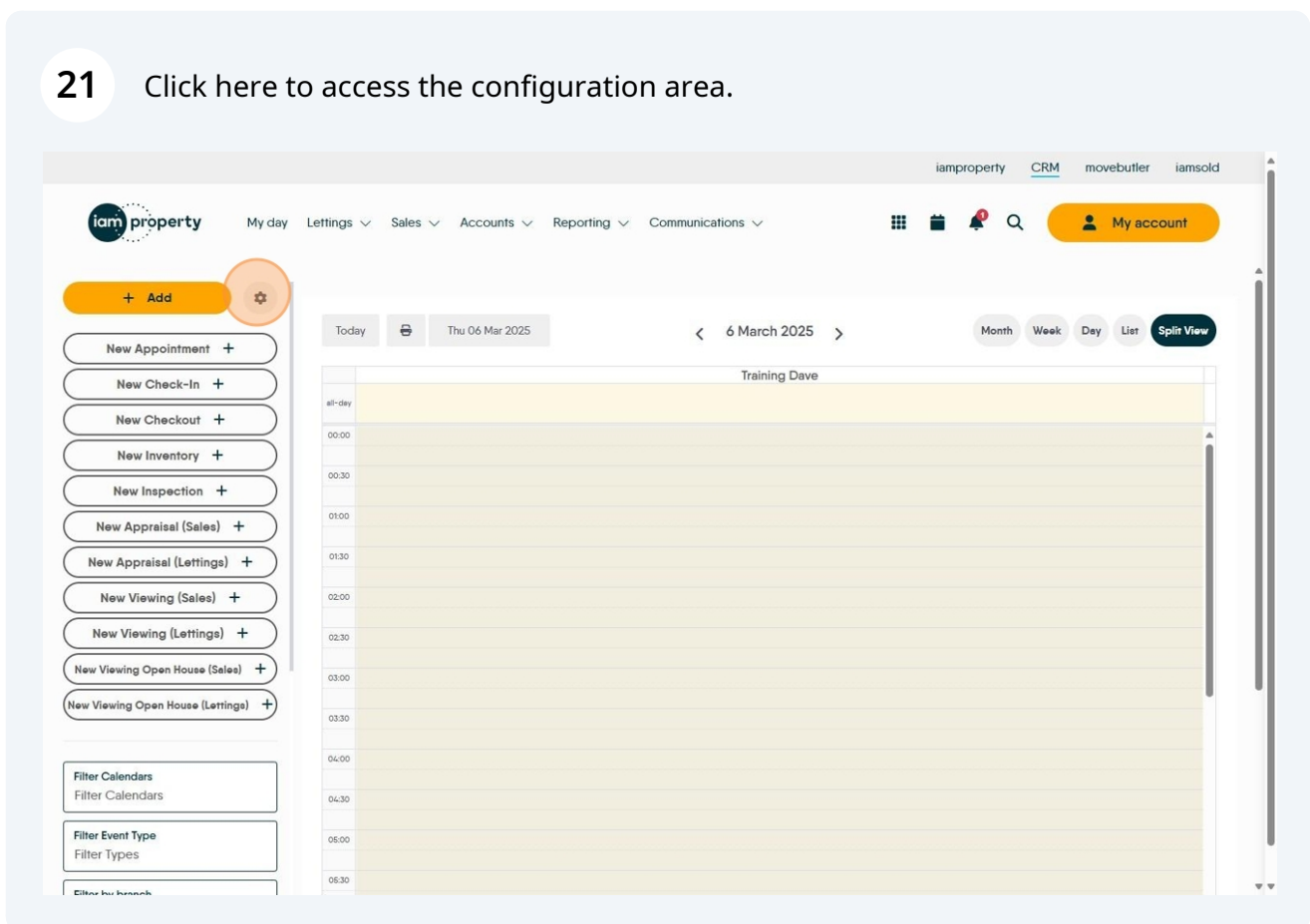
Today
3 – 9 Mar 2025
Month
Week
Day
List
Split View

	Mon 3/3	Tue 4/3	Wed 5/3	Thu 6/3	Fri 7/3	Sat 8/3	Sun 9/3
08:00							
08:30							
09:00							
09:30							
10:00	Appraisal S	Appraisal S	Appraisal S	Appraisal S	Appraisal S	Appraisal S	Appraisal S
10:30							
11:00							
11:30							
12:00	Test test	Test test	Test test	Test test	Test test	Test test	Test test



Configuring the CRM Calendar

21 Click here to access the configuration area.



22

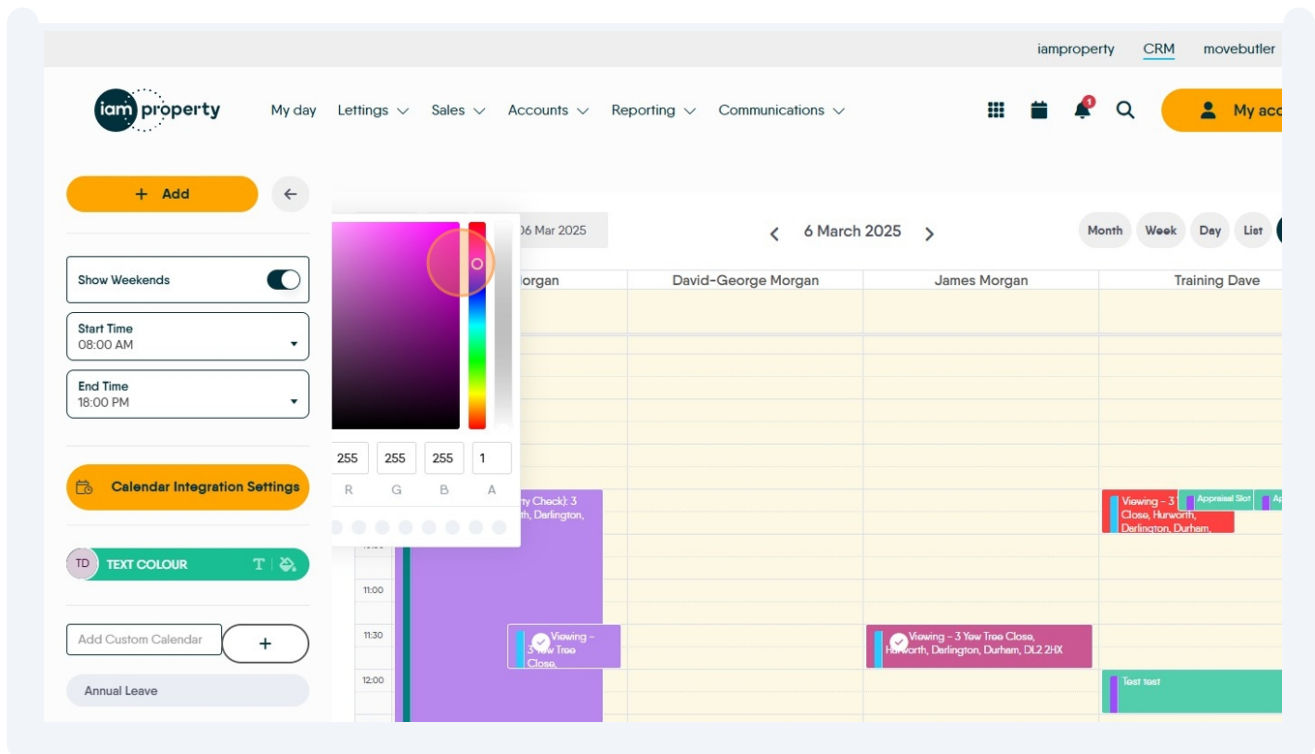
Click here to show weekends in the Calendar. The start and end dates of the day can also be set here.

The screenshot shows the 'iam property' dashboard. On the left, there's a sidebar with a '+ Add' button and a 'Show Weekends' toggle switch (currently off). Below it are 'Start Time' (08:00 AM) and 'End Time' (18:00 PM) dropdowns. At the bottom of the sidebar is a 'Calendar Integration Settings' button. The main calendar area shows a view for 'Thu 06 Mar 2025' with columns for 'Brooke Morgan' and 'David-George Morgan'. The calendar grid shows time slots from 'all-day' to '09:30'.

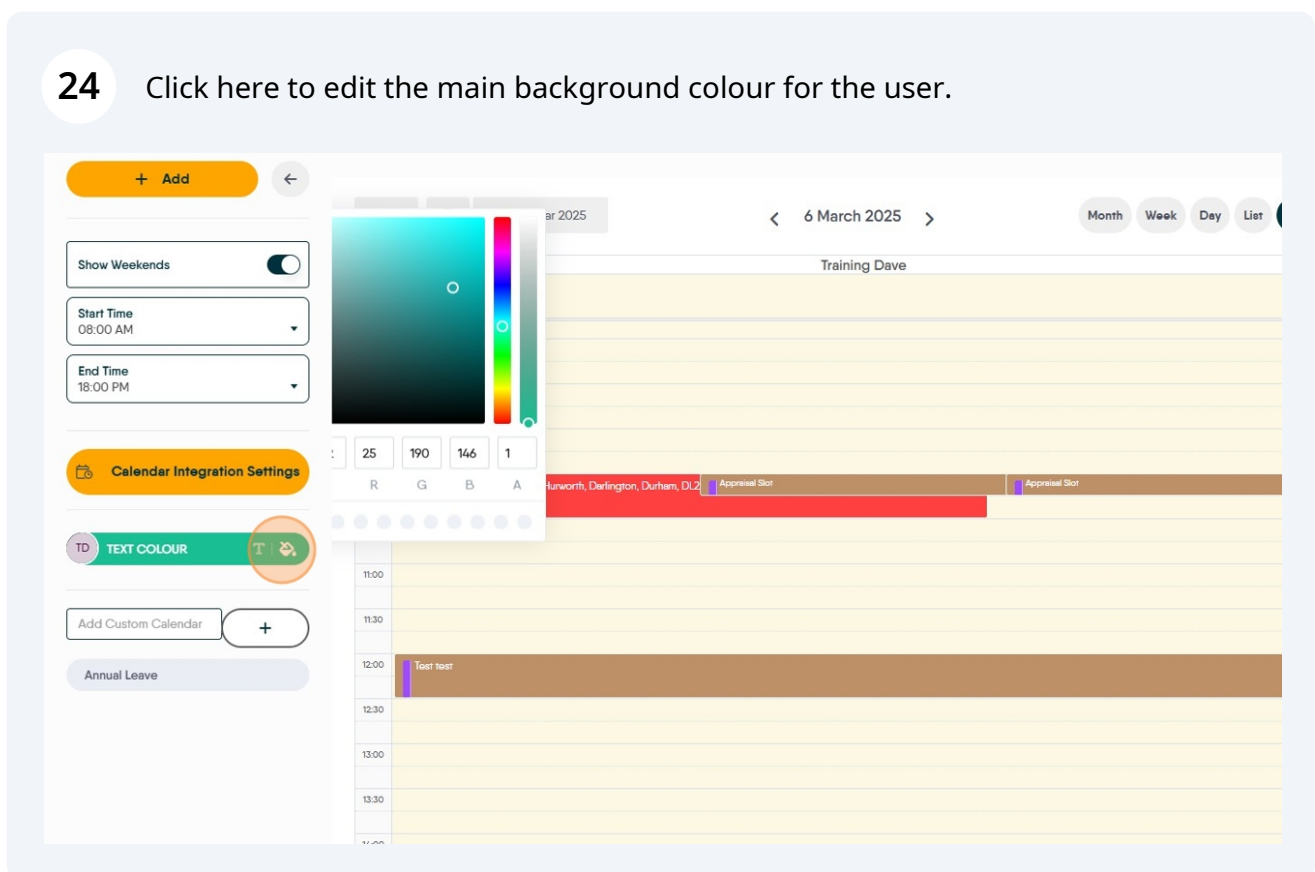
23

Click here to change the text colour assigned to a user.
Click here to edit the colour, be careful not to select a colour that is hard to view

The screenshot shows the 'iam property' dashboard with more settings. In the sidebar, there's a 'TEXT COLOUR' dropdown menu (currently set to 'TD') and an 'Add Custom Calendar' button. The main calendar area shows a view for '6 March 2025' with columns for 'Brooke Morgan', 'David-George Morgan', 'James Morgan', and 'Training Dave'. The calendar grid shows time slots from 'all-day' to '13:00'. Several events are visible: a large purple event for 'Inspection (New Property Check): 3 Yaw Tris Close, Hunworth, Darlington, Durham, DL2 2HX, UK' starting at 10:00; a smaller purple event for 'Viewing - 3 Yaw Tris Close, Hunworth, Darlington, Durham, DL2 2HX' starting at 11:30; a red event for 'Viewing - 3 Yaw Tris Close, Hunworth, Darlington, Durham, DL2 2HX' starting at 12:00; and a green event for 'Test test' starting at 12:30.

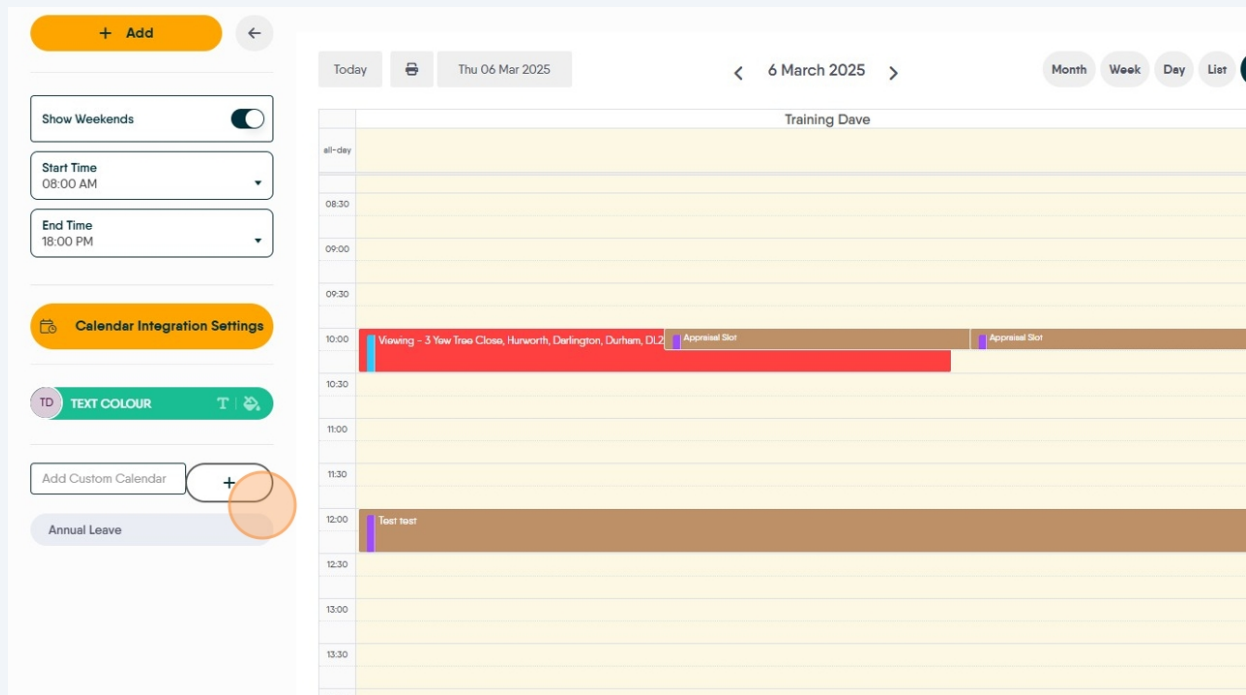


24 Click here to edit the main background colour for the user.



25 Click here to add a custom calendar.

If you are part of a group of Agencies please check before adding a personal calendar as it can stop others seeing you appointments.



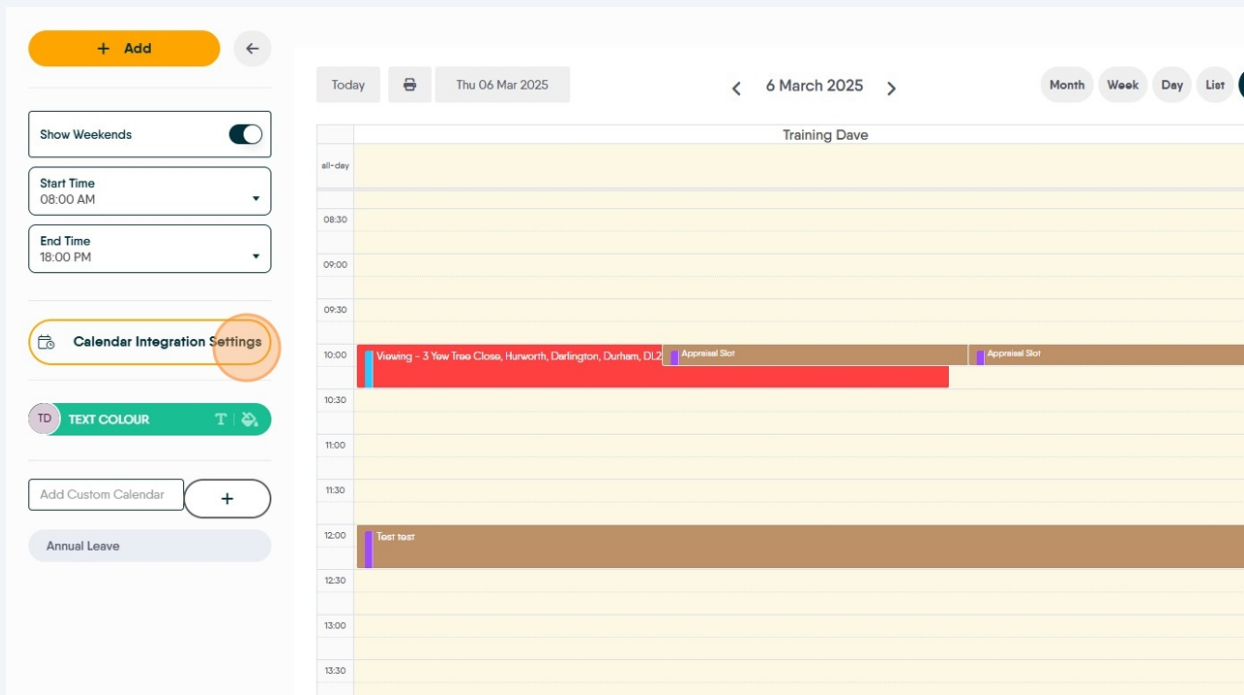
Integrating with Outlook or Google Calendars



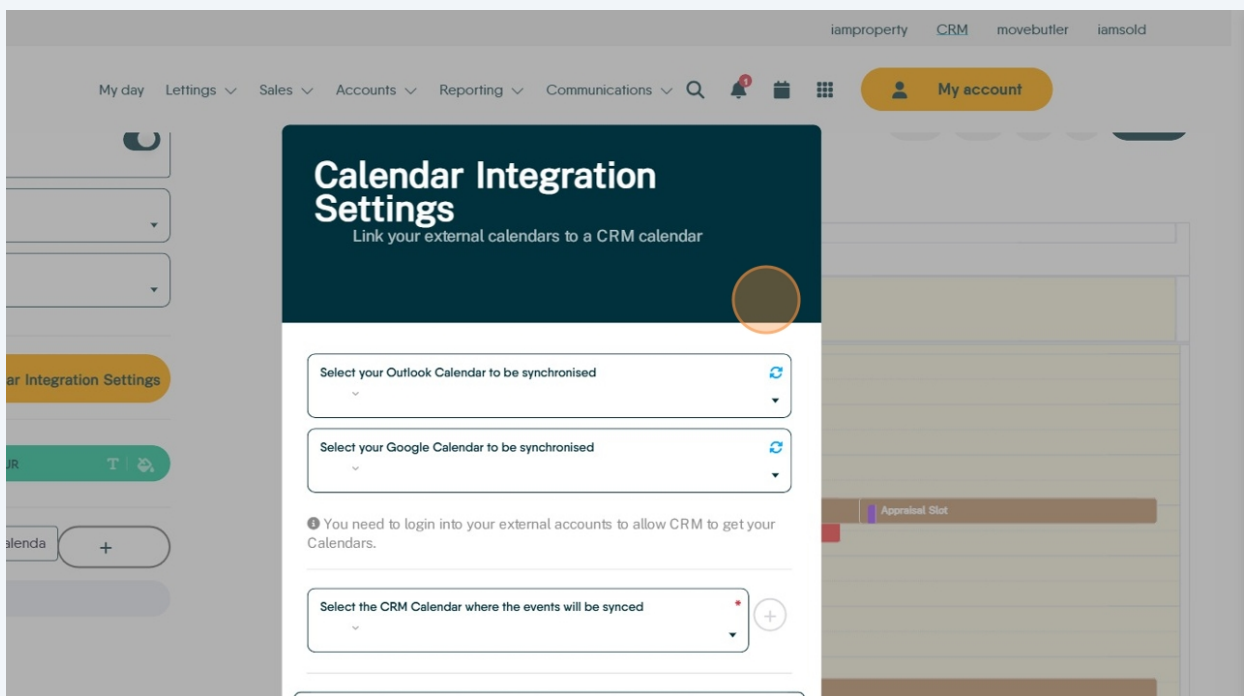
Alert! Before Integrating your Calendars check with your IT department to ensure permissions are in place to allow this.

Failure to connect is usually down to a security setting in your email service.

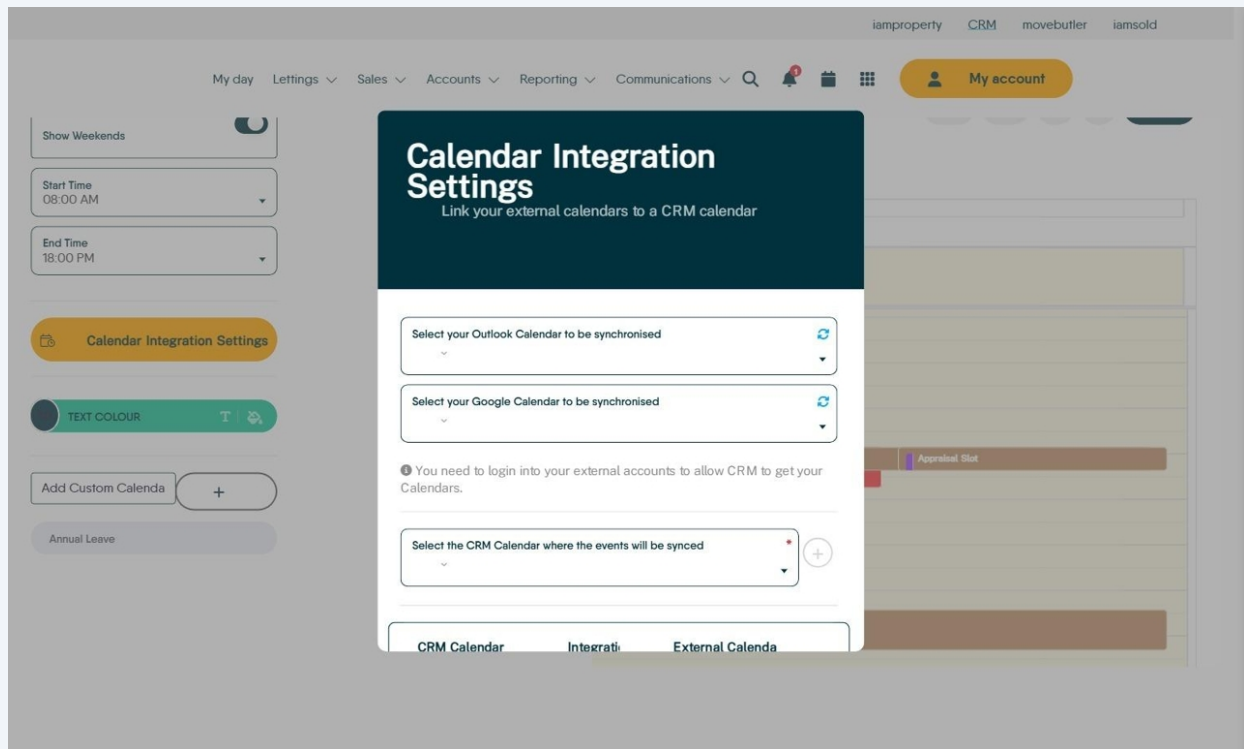
26 Click "Calendar Integration Settings"



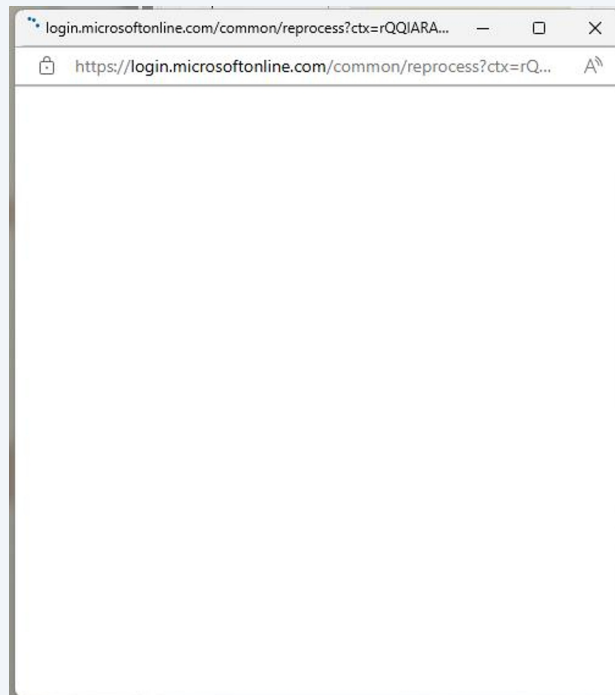
27 Click here.



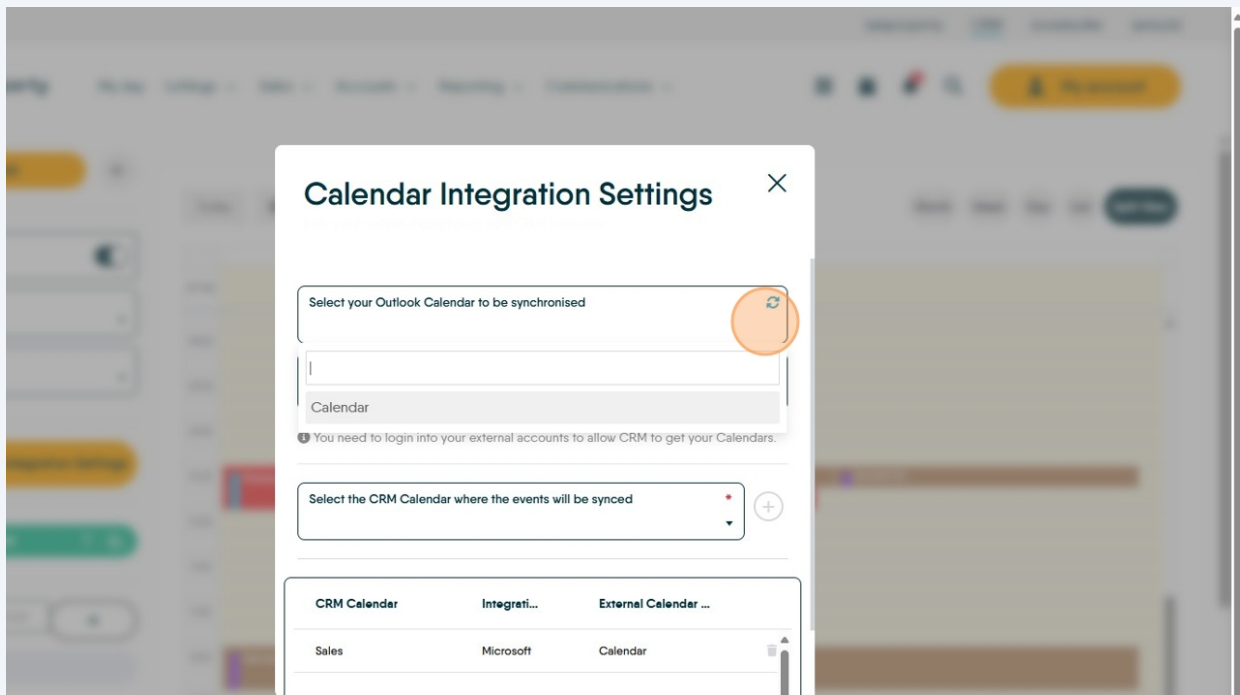
28 Click here.



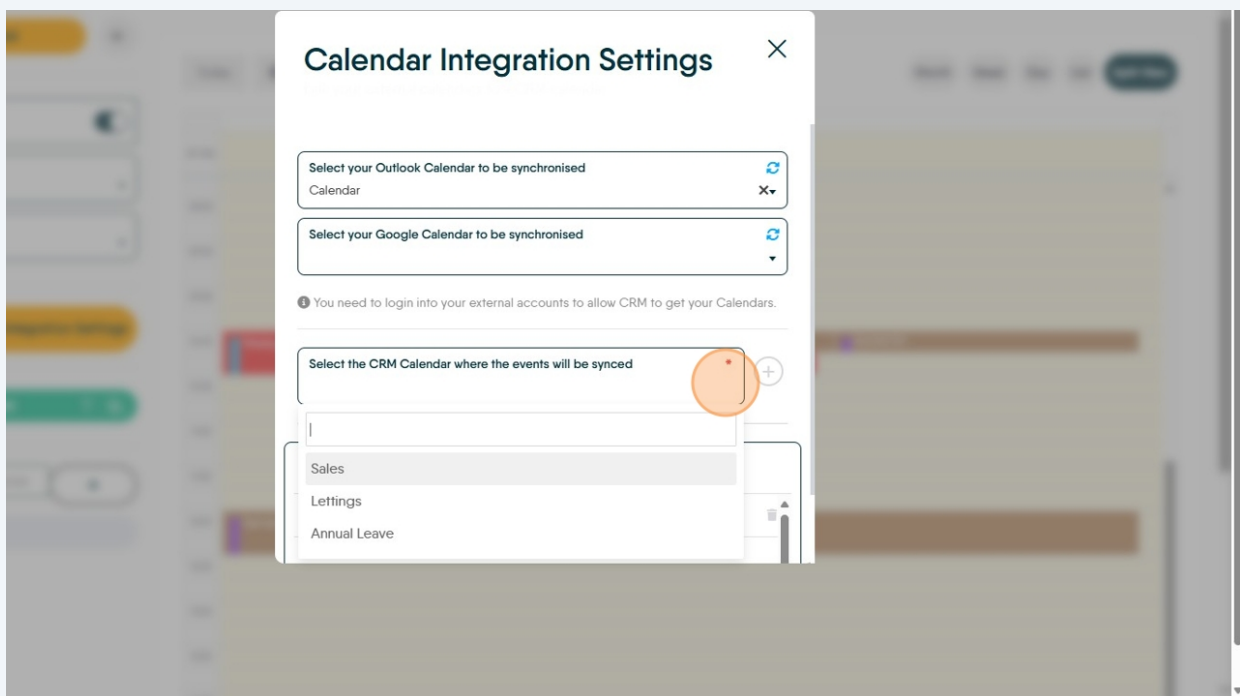
29 If you are using Outlook this screen will show, follow the instructions to sign in etc.



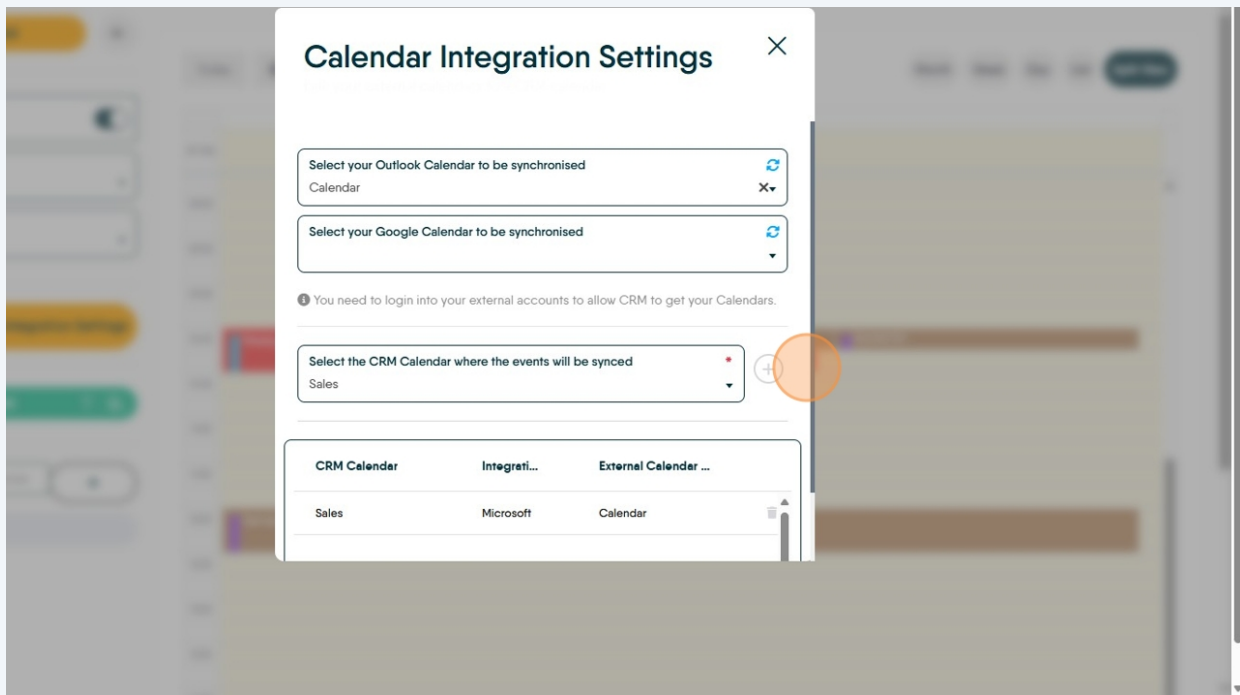
- 30 Click here and set the calendar that the synchronised information comes from



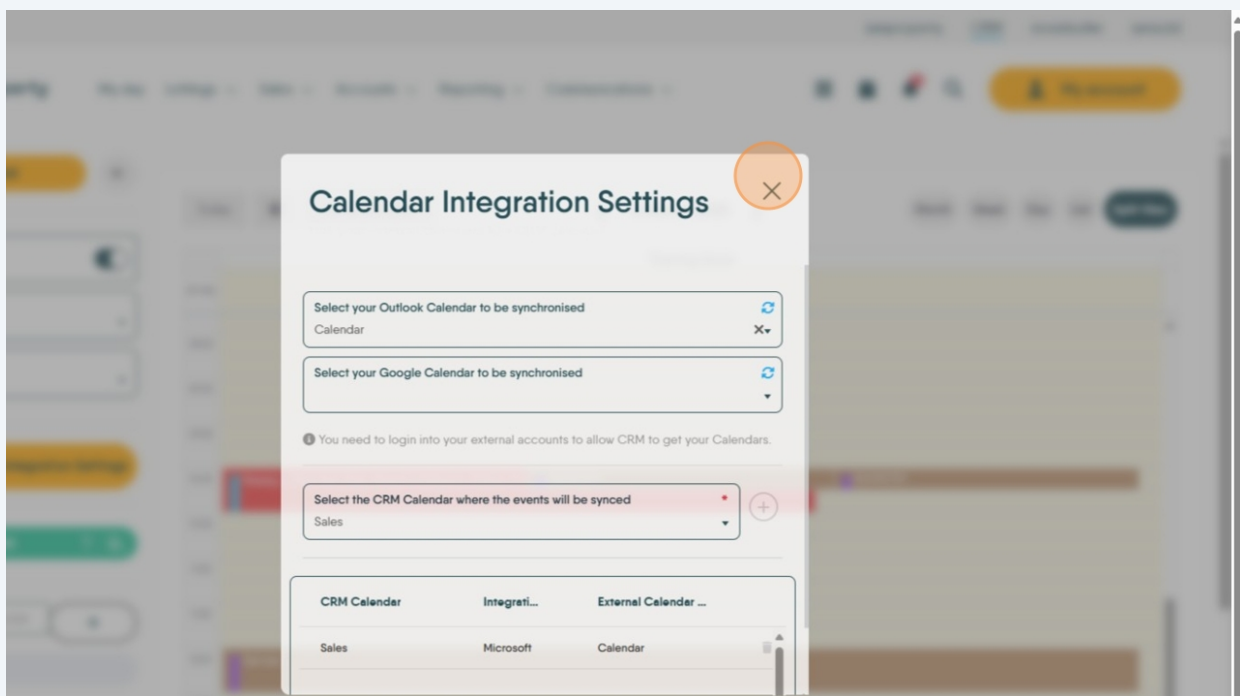
- 31 Click here and set the calendar that the synchronised information goes to.



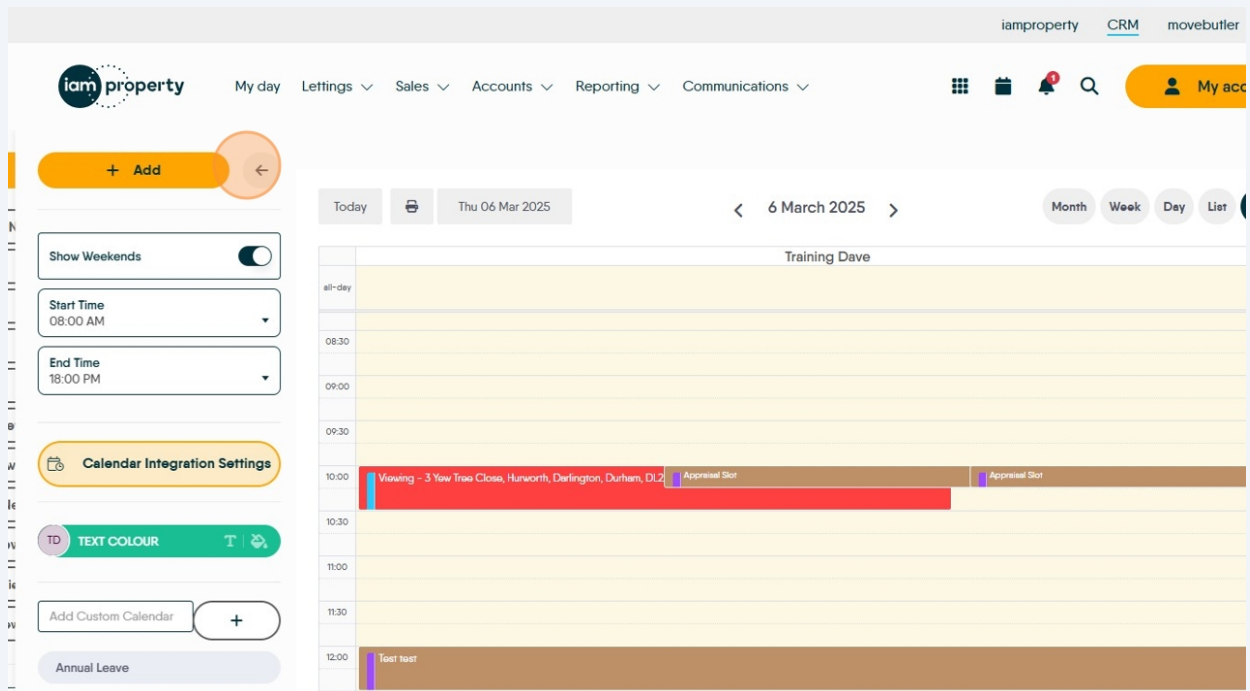
- 32 The calendar information will show at the bottom of the screen.



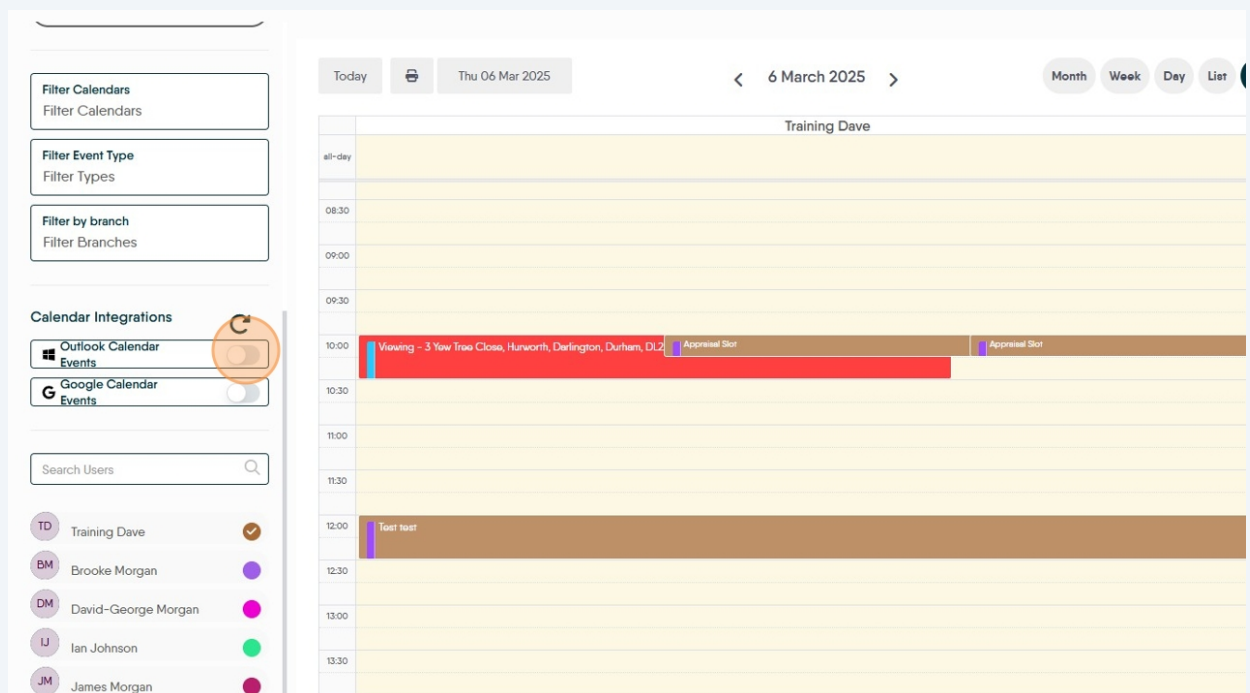
- 33 Click here to close this screen.



34 Click here to return to the initial calendar screen.



35 Click here to enable/disable the Calendar Integrations.



36 Click here to refresh and update the calendar info.

The CRM Calendar and the Outlook/Google calendar will now show the entries from each other, a new entry in CRM will show in Outlook/Google and vice versa.

The screenshot displays the CRM Calendar interface. On the left, there are filter options: 'Filter Calendars' (Filter Calendars), 'Filter Event Type' (Filter Types), and 'Filter by branch' (Filter Branches). Below these are 'Calendar Integrations' for 'Outlook Calendar Events' and 'Google Calendar Events'. A 'Search Users' field is also present. A list of users is shown at the bottom left: Training Dave (TD), Brooke Morgan (BM), David-George Morgan (DM), and Ian Johnson (IJ). A 'Refresh' button with a circular arrow icon is highlighted. The main calendar view shows the date '6 March 2025' and a list of events for 'Training Dave'. The events include 'all-day', '08:30', '09:00', '09:30', '10:00' (Viewing - 3 Yew Tree Close, Hunworth, Darlington, Durham, DL2), '10:30', '11:00', '11:30', '12:00' (Test test), '12:30', '13:00', and '13:30'. The calendar grid shows the events as colored bars.