

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>

The screenshot shows the iam property CRM interface. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right side of the top bar are icons for a grid, a calendar, a bell, a search bar, and a 'My account' button. Below the navigation bar, the main area displays a 'Welcome back, Training' message. There are two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a single entry: '12:00 Test test'. The 'My tasks' section shows four entries in a table format:

Time	Name	Status	Name	Priority	Start date	Due date
12:00	Test test	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"

iamproperty CRM movebutler iamsold

My day Lettings Sales Accounts Reporting Communications

My account

Welcome back, Training

New Record View Property Management Visit Help Centre

Records

My events

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

My tasks

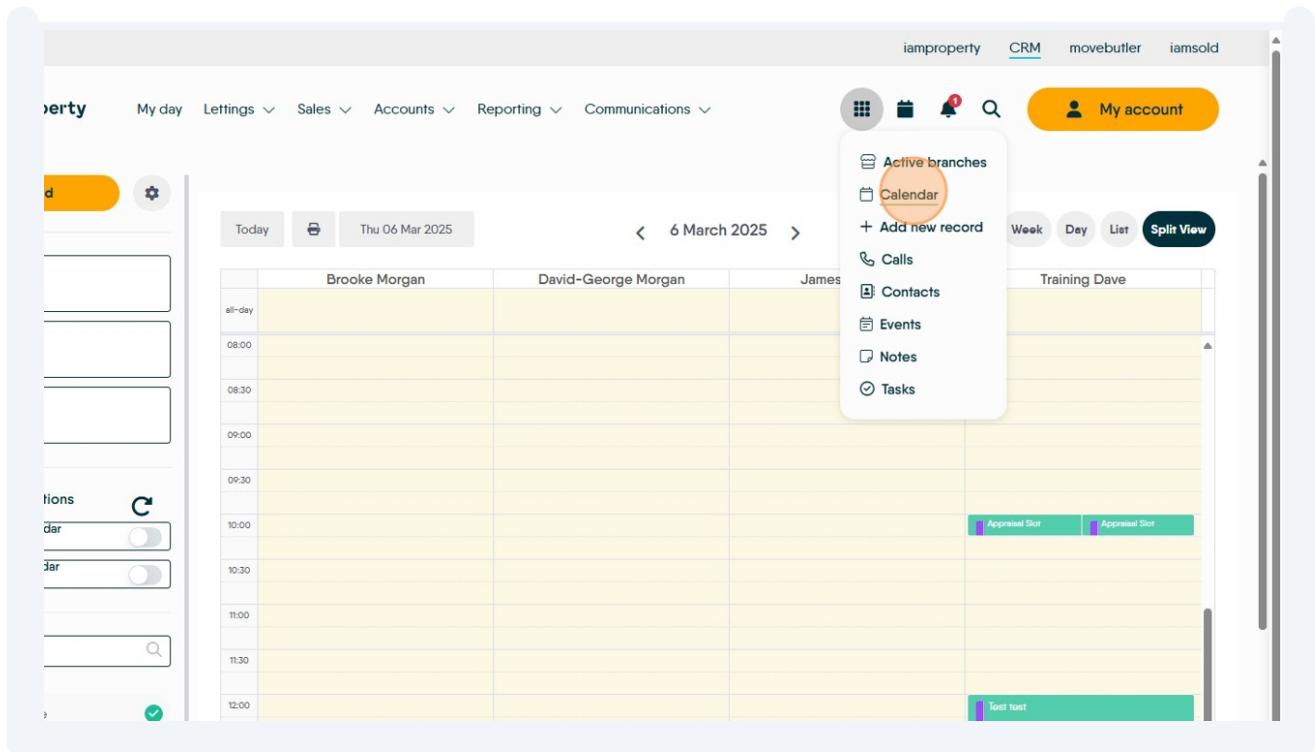
Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

My day My account

Today Thu 06 Mar 2025 6 March 2025 Month Week Day List Split View

Events

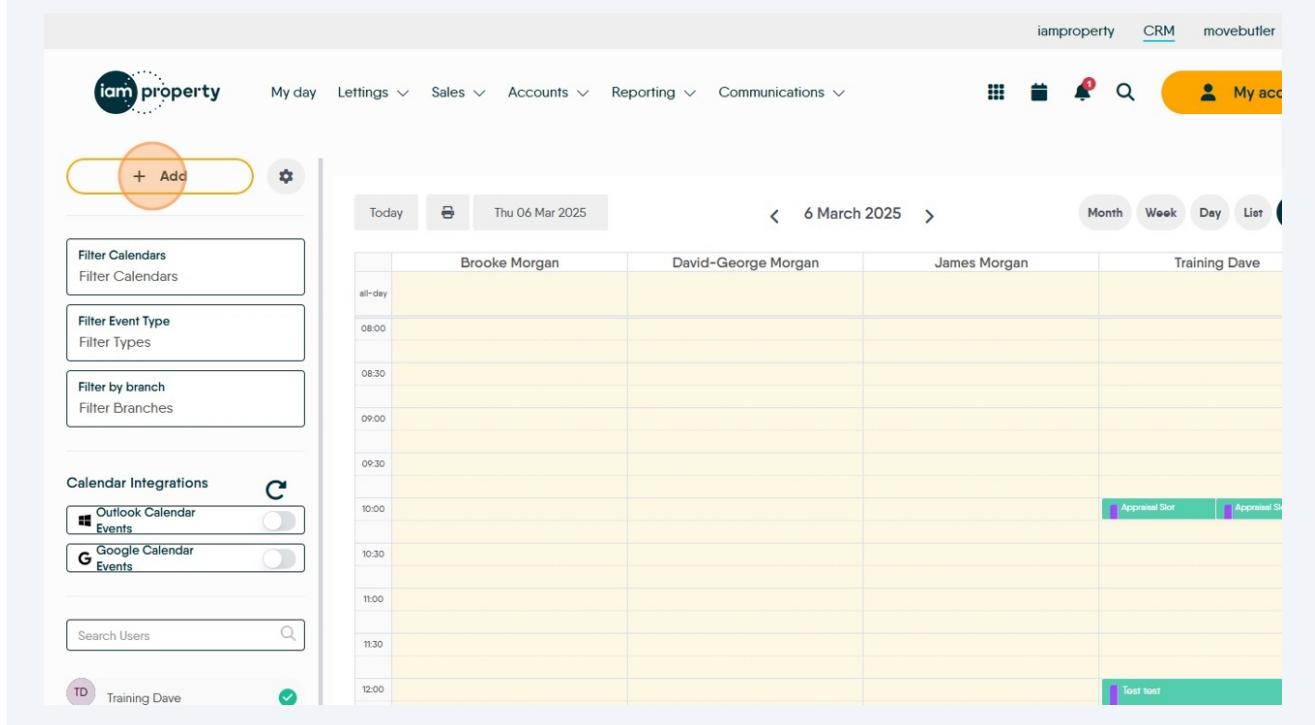
all-day	Brooke Morgan	David-George Morgan	James Morgan	Training Dave
08:00				
08:30				
09:00				
09:30				
10:00				Appraisal Slot
10:30				Appraisal Slot
11:00				
11:30				
12:00				Test test



Adding a Calendar Entry

3 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.



My day Lettings Sales Accounts Reporting Communications

+ 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

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			
10:30			
11:00			
11:30			
12:00			
12:30			Test test

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

Add

- Appointment +
- ✓ Check-In +
- ✓ Checkout +
- ✓ Inventory +
- ✓ Inspection +
- ✓ Appraisal (Sales) +
- ✓ Appraisal (Lettings) +
- ✓ Viewing (Sales) +
- ✓ Viewing (Lettings) +
- ✓ Open House (Sales) +
- ✓ Open House (Lettings) +

Filters

Calendars

Type

Today Thu 06 Mar 2025 6 March 2025 < > Month Week Day List Split 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 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK		
10:30			
11:00			
11:30			
12:00			
12:30			
13:00			
13:30			

Viewing - 3 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX

Test test

5 Select the appointment type from the drop down list.

The screenshot shows a software interface for managing property bookings. On the left, there's a sidebar with various buttons and filters. The main area is a calendar view for March 2025. A specific slot on March 6th, 10:00-12:30, is highlighted in purple and contains the text: 'Inspection (New Property Check): 3 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK'. A context menu is open over this slot, with 'Add Viewing' highlighted and circled in orange. Other options in the menu include 'Add Appointment', 'Lettings', 'Add Check-In', 'Add Checkout', 'Add Inventory', 'Add Inspection', 'Add Open House Viewing', 'Add Appraisal', 'Sales', and 'Close'.

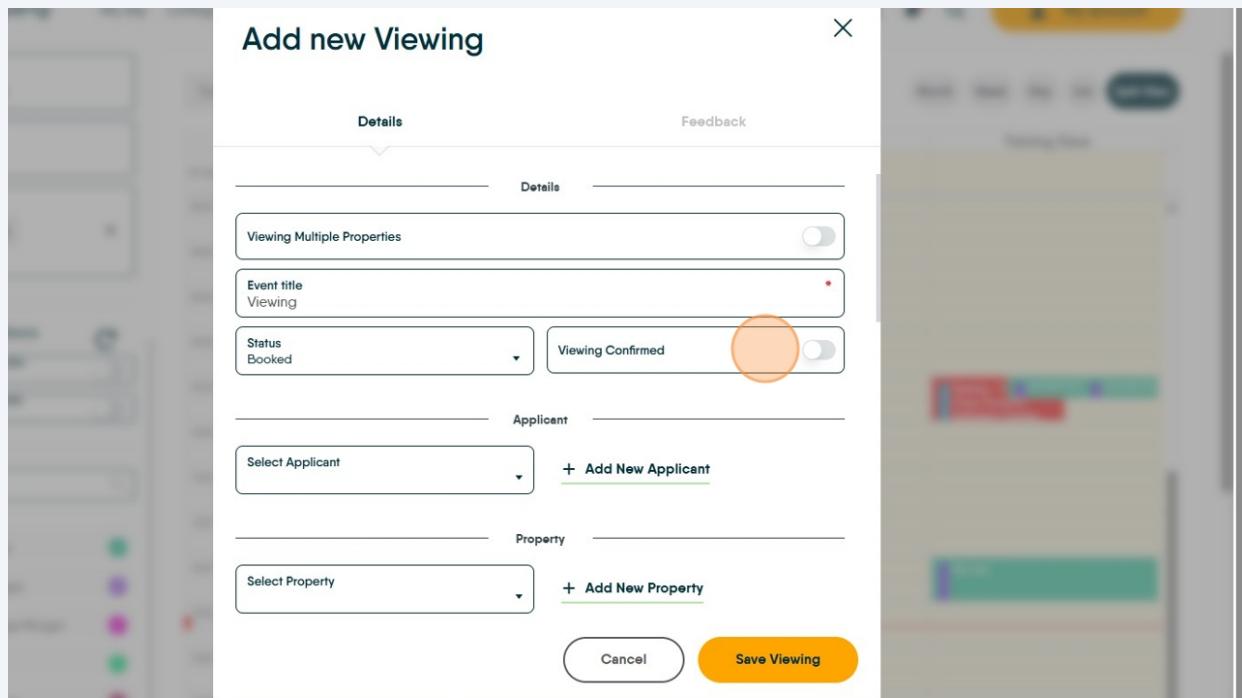
6 In this example we are using 'Viewing'.

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

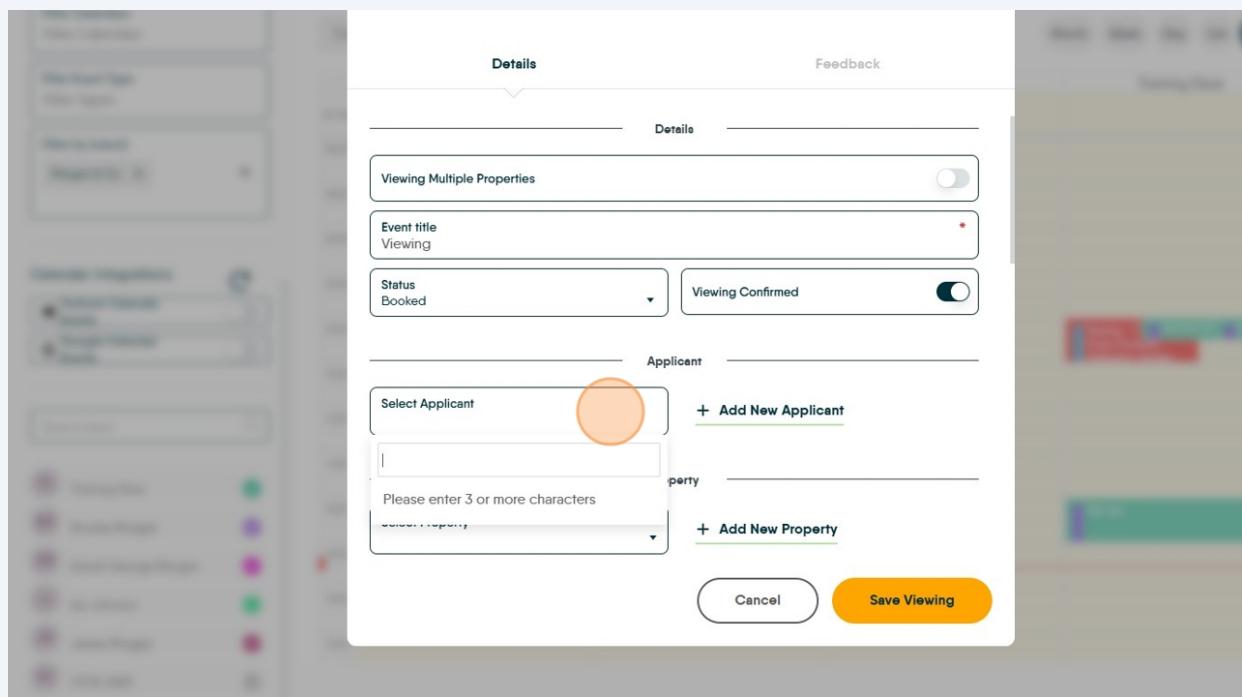
The screenshot shows a modal dialog box titled 'Add new Viewing'. The dialog is divided into sections: 'Details' (which is expanded), 'Feedback' (which is collapsed), 'Applicant' (which is collapsed), and 'Property' (which is collapsed). In the 'Details' section, there are fields for 'Viewing Multiple Properties' (with a toggle switch), 'Event title' (set to 'Viewing'), and 'Status' (set to 'Booked', which is circled in orange). There is also a 'Viewing Confirmed' toggle switch (which is also circled in orange). In the 'Applicant' section, there is a 'Select Applicant' dropdown and a '+ Add New Applicant' button. In the 'Property' section, there is a 'Select Property' dropdown and a '+ Add New Property' button. At the bottom right of the dialog are 'Cancel' and 'Save Viewing' buttons.

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

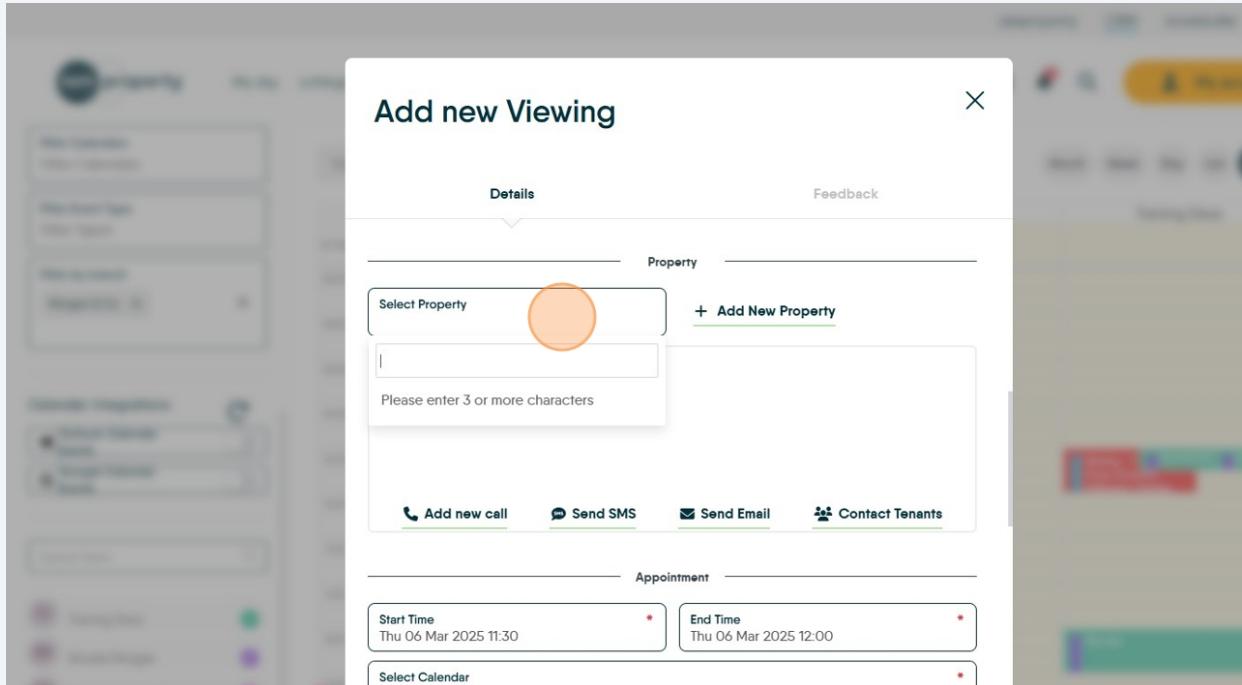
If not confirmed the viewing will show in the calendar in red, and will show as unconfirmed in the Applicant and Property records.



8 Click here to search for or add the applicant.

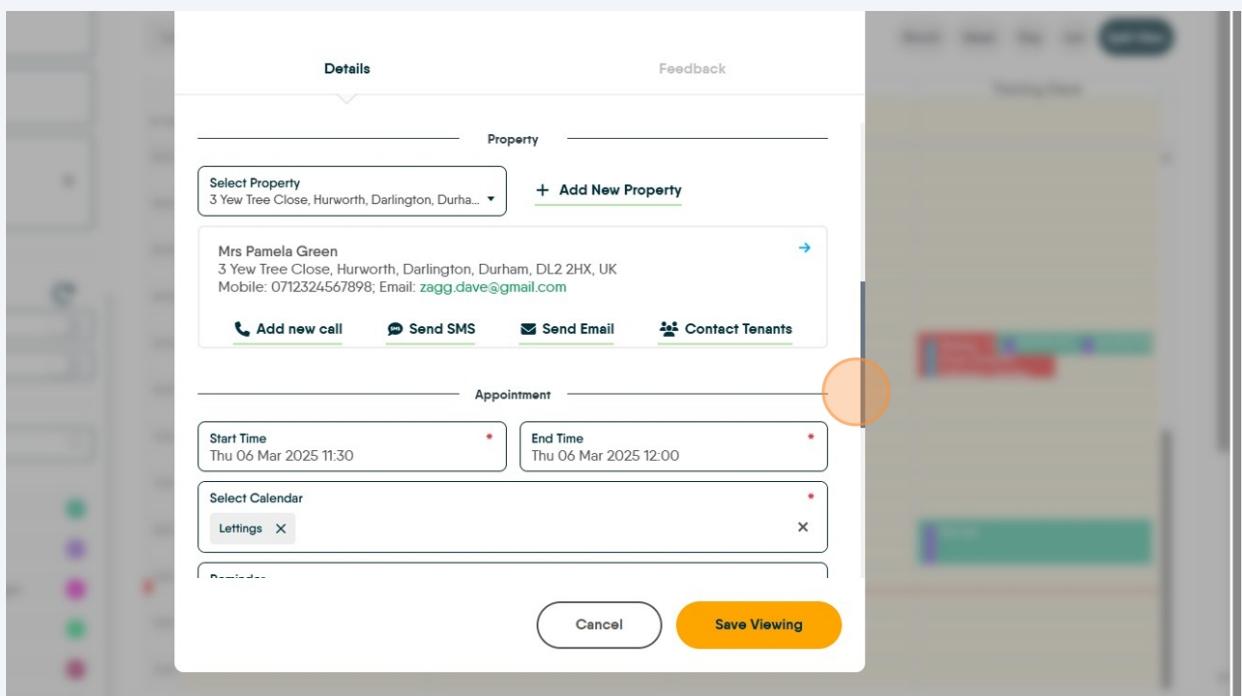


9 Click here to search for the Property. A new property can be added from here as well.



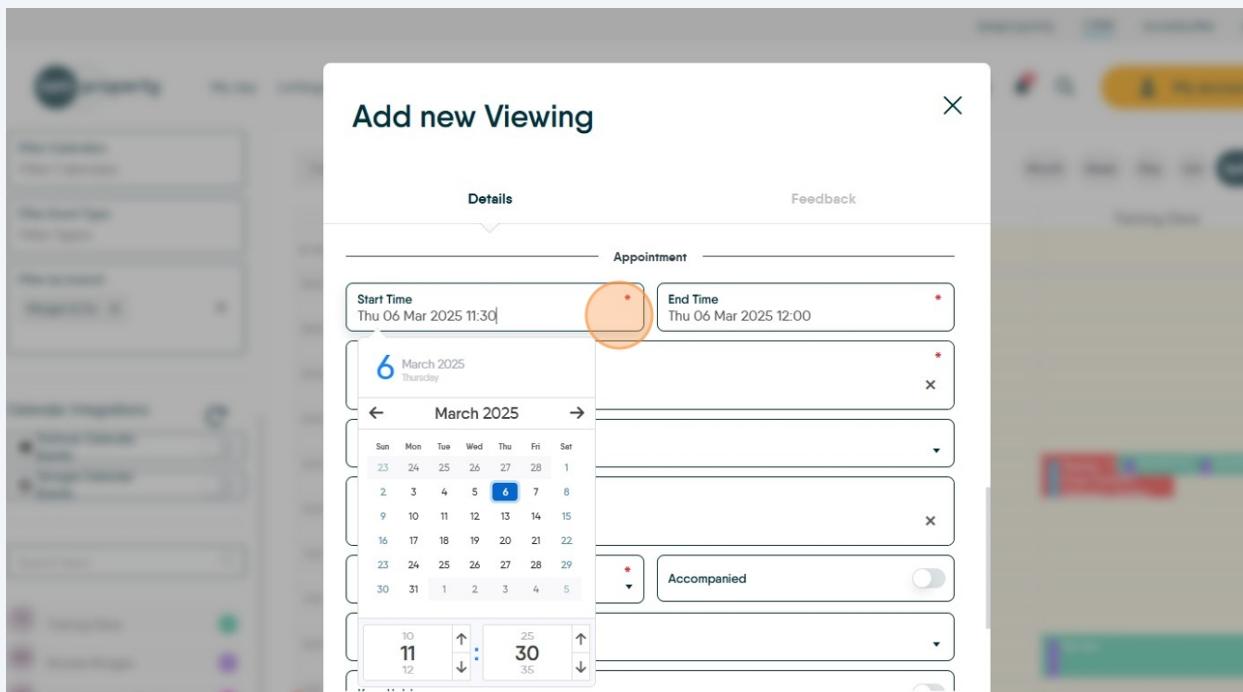
10 The details of the property plus the Vendor/Landlord will also show.

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



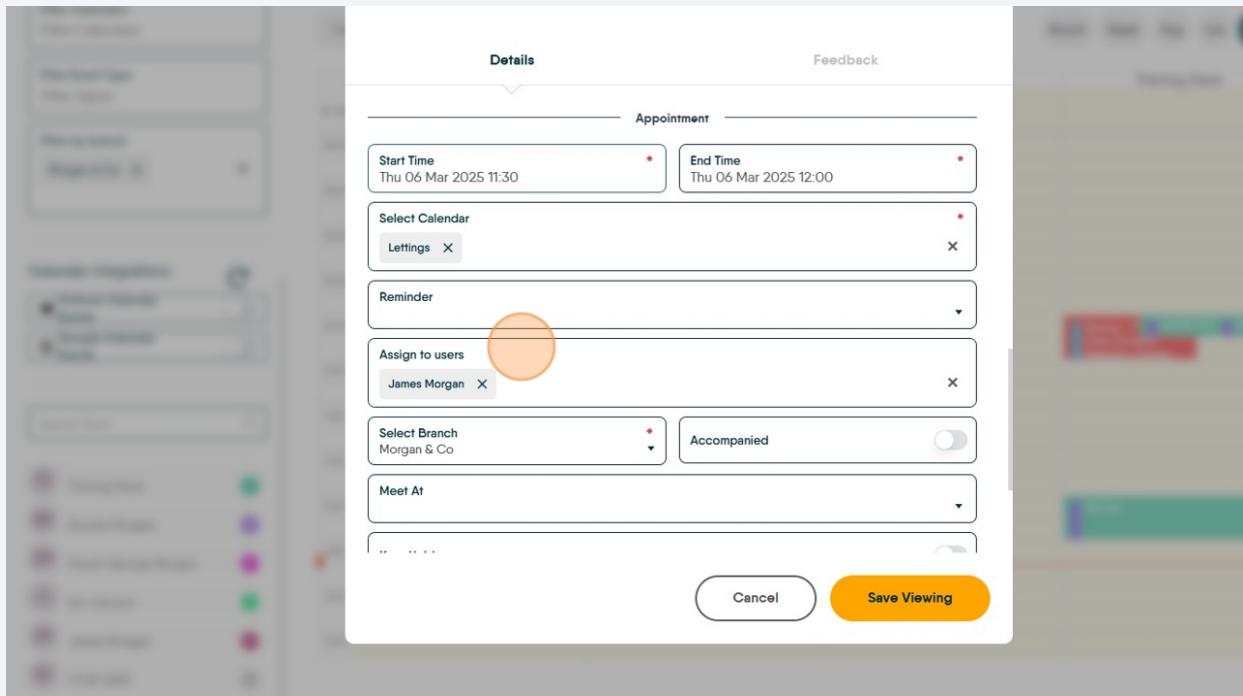
11

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.

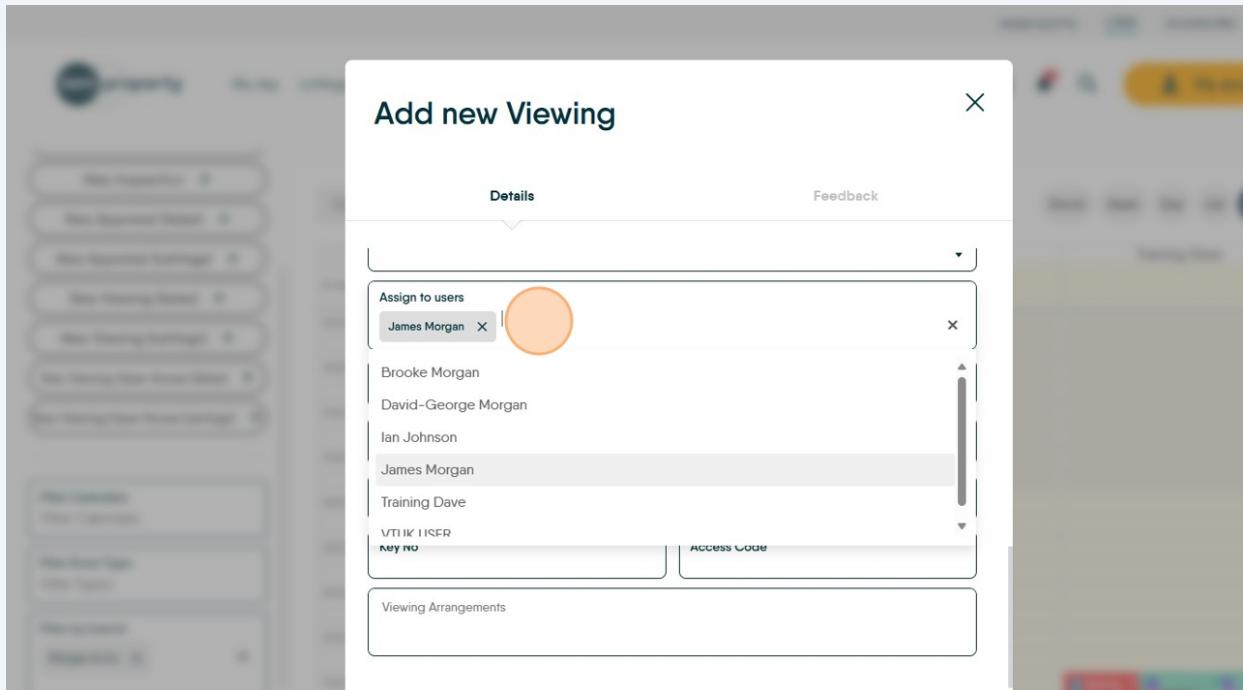


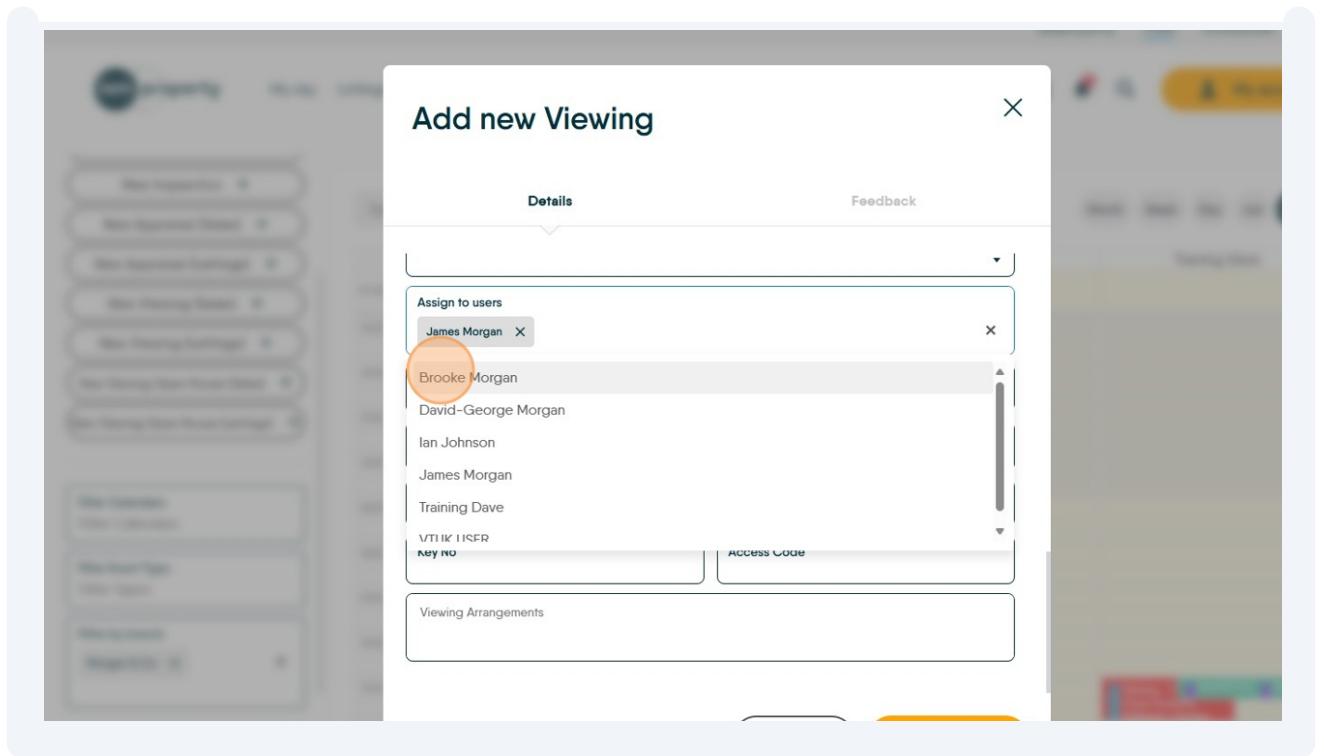
12 Complete the additional fields as required.

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

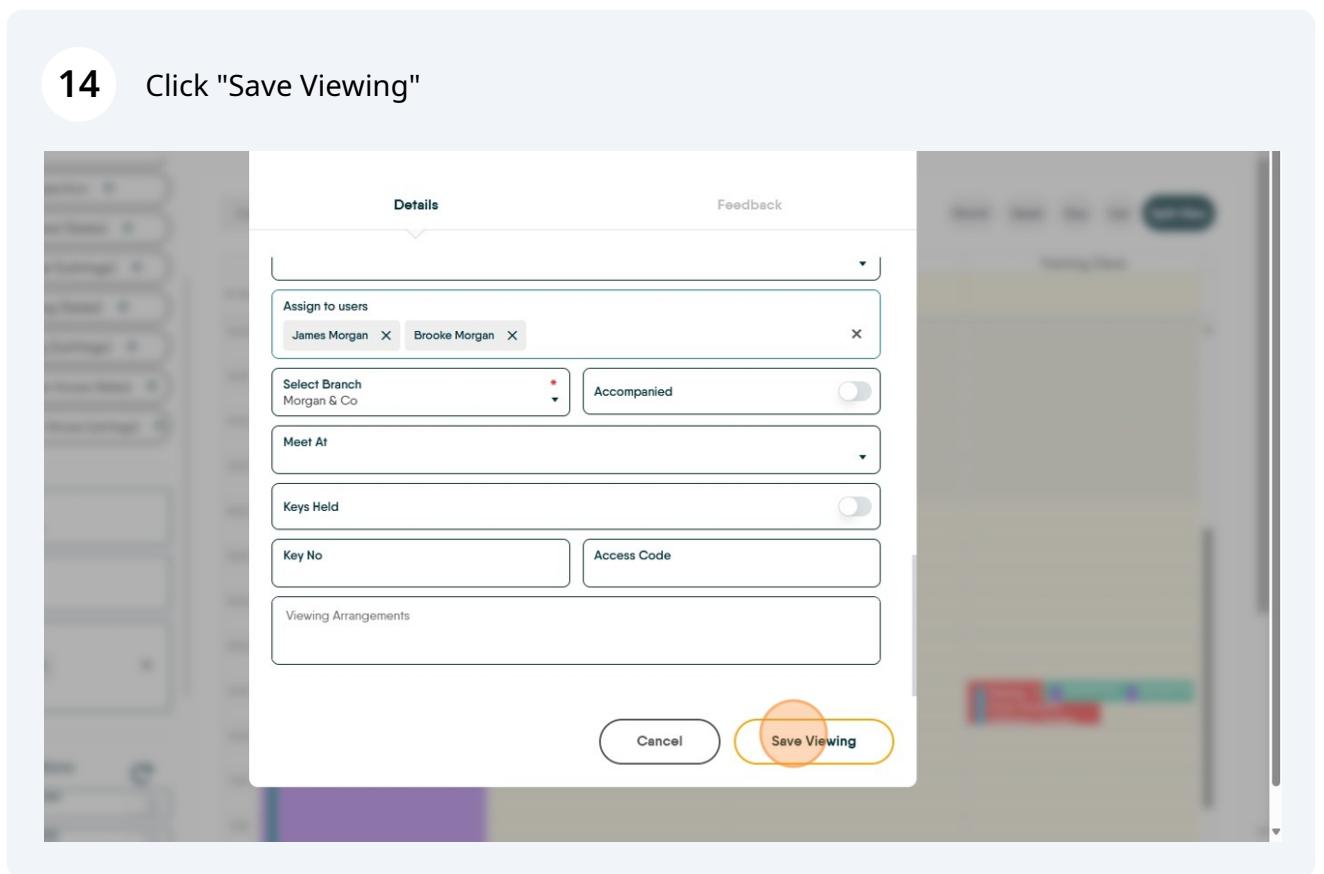


13 Assign to Users will be set from the Calendar you are using, however this allows you to assign the appointment to any user or multiple users.
Click "Brooke Morgan"





14 Click "Save Viewing"



15

The appointment will then show in the Calendar.

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

The screenshot shows the im property software interface. On the left, there is a sidebar with 'Calendars' and 'Event Type' filters, and a 'by branch' section with 'Jan & Co' selected. Below this are 'Calendar Integrations' for 'iLook Calendar' and 'Google Calendar', and a list of users: 'Training Dave' (green), 'Brooke Morgan' (purple), 'David-George Morgan' (pink), and 'Jan Johnson' (green). The main area is a calendar for '6 March 2025'. It shows several appointments for different users. A specific appointment for 'Brooke Morgan' is highlighted in purple. A callout box provides details: 'Inspection (New Property Check): 3 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2BW, UK'. An arrow points to a red box labeled 'Unconfirmed'.

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.

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				
10:30				
11:00				
11:30				
12:00				
12:30			Test test	
13:00				

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				
10:30				
11:00				
11:30				
12:00				
12:30			Test test	
13:00				

17

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

The screenshot shows a calendar interface with a sidebar on the left containing various filters and a main calendar grid on the right.

Left Sidebar Filters:

- 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 (highlighted with an orange circle)
- Filter by branch
- Filter Branches
- Calendar Integrations
- Outlook Calendar Events (switch off)
- Google Calendar Events (switch off)
- Search Users

Right Calendar Grid:

- Header: Today, Thu 06 Mar 2025, 6 March 2025, Month, Week, Day, List.
- Rows: all-day, 08:00, 08:30, 09:00, 09:30, 10:00, 10:30, 11:00, 11:30, 12:00, 12:30, 13:00, 13:30.
- Columns: Brooke Morgan, David-George Morgan, James Morgan, Training Dave.
- Events:
 - 12:30 - 13:30: A red horizontal bar representing an appointment.
 - 12:30 - 13:30: A teal box labeled "Test test" representing an appraisal slot.
- Legend: Appraisal Slot (purple), Appraisal Start (green).

The screenshot shows the same calendar interface as the first one, but with the "Filter Types" dropdown expanded in the sidebar.

Left Sidebar Filters (with expanded "Filter Types" dropdown):

- 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 (highlighted with an orange circle)
- Appointment
- Appraisal
- Check-in
- Checkout
- Inventory
- Inspection
- Events (highlighted with an orange circle)
- Search Users

Right Calendar Grid:

- Header: Today, Thu 06 Mar 2025, 6 March 2025, Month, Week, Day, List.
- Rows: all-day, 08:00, 08:30, 09:00, 09:30, 10:00, 10:30, 11:00, 11:30, 12:00, 12:30, 13:00, 13:30.
- Columns: Brooke Morgan, David-George Morgan, James Morgan, Training Dave.
- Events:
 - 12:30 - 13:30: A red horizontal bar representing an appointment.
 - 12:30 - 13:30: A teal box labeled "Test test" representing an appraisal slot.
- Legend: Appraisal Slot (purple), Appraisal Start (green).

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

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				 
10:30				
11:00				
11:30				
12:00				
12:30				
13:00				
13:30				

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				 
10:30				
11:00				
11:30				
12:00				
12:30				
13:00				
13:30				

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

Reports & Letters

Search Users 

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 user interface for managing multiple calendars. On the left, there are three filter sections: 'Filter Calendars' (with 'Filter Calendars' button), 'Filter Event Type' (with 'Filter Types' button), and 'Filter by branch' (with 'Morgan & Co' selected and an 'X' button). Below these is a 'Calendar Integrations' section with 'Outlook Calendar Events' and 'Google Calendar Events' toggles, both turned off. A 'Search Users' input field is followed by a list of users with circular icons: TD (Training Dave), BM (Brooke Morgan), DM (David-George Morgan), IJ (Ian Johnson), JM (James Morgan), and VU (VTUK USER). The 'BM' icon is highlighted with a yellow circle and a checkmark. To the right is a 10x2 grid calendar for March 6, 2025. The grid shows hours from 10:30 to 16:30. A red line starts at 12:30. A green box in the bottom right corner contains the text 'Test Test'.

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.

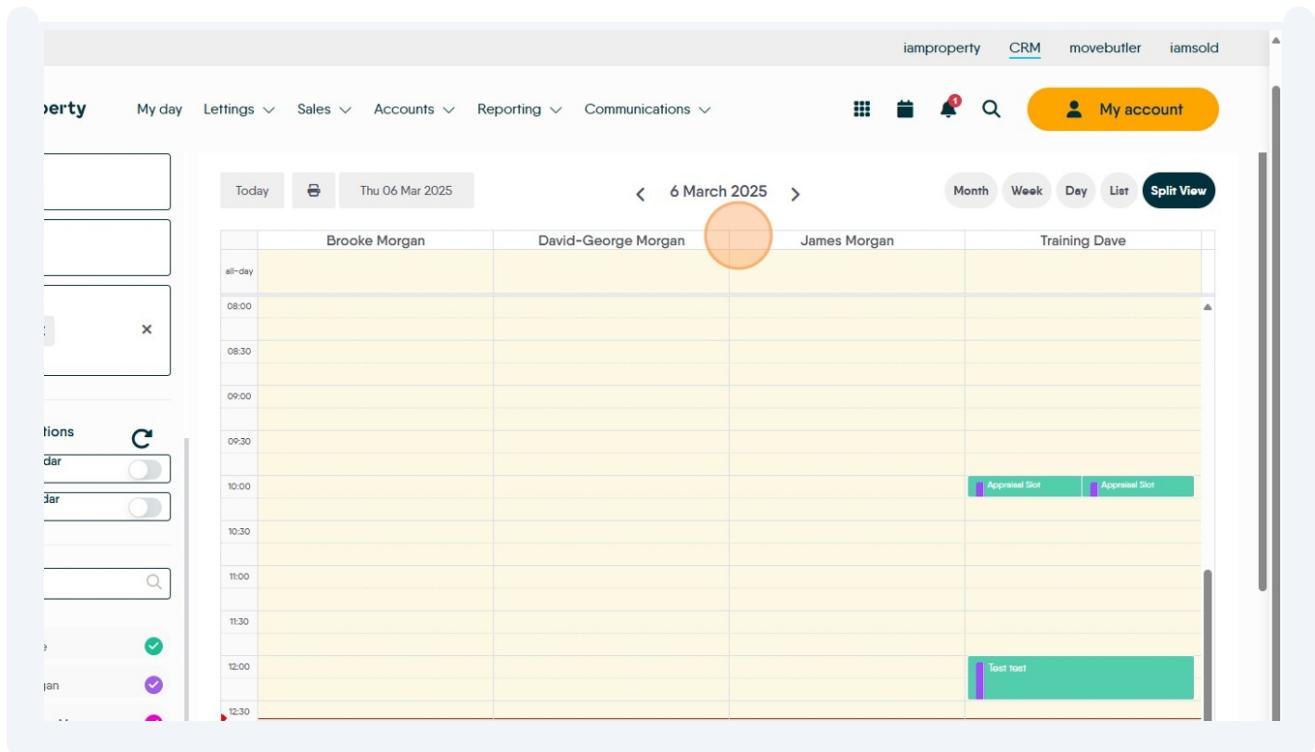
The screenshot shows a calendar interface with a 'Month' view selected. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'CRM', 'movebutler', and 'iamsold'. Below the navigation is a date range from 'Thu 06 Mar 2025' to '6 March 2025' with arrows for navigation. The main calendar grid shows four users: Brooke Morgan, David-George Morgan, James Morgan, and Training Dave. Each user has a column in the grid. The grid shows hours from 00:00 to 04:30. The 'Training Dave' column is highlighted with a yellow circle and a checkmark. On the left, there are filter sections for 'Event Types' (with 'adar' and 'jar' toggles), 'Search Users' (with a search icon), and a list of users: TD, BM, DM, IJ, JM, and VU. The 'BM' icon is highlighted with a yellow circle and a checkmark.

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
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 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
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

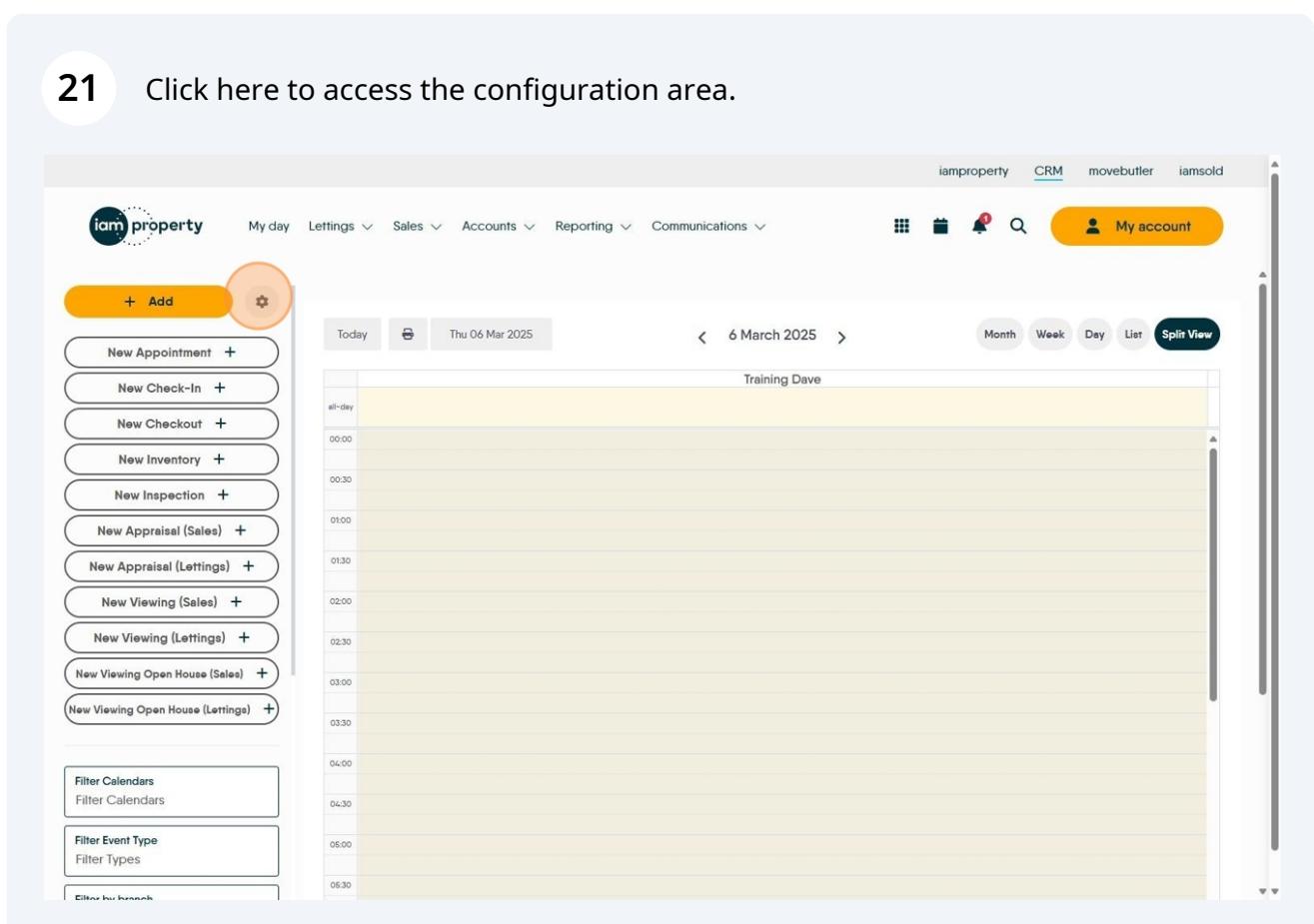
Today  3 - 9 Mar 2025 < > Month Week Day List Split View

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					
10:30						
11:00						
11:30						
12:00	Test test Test test					



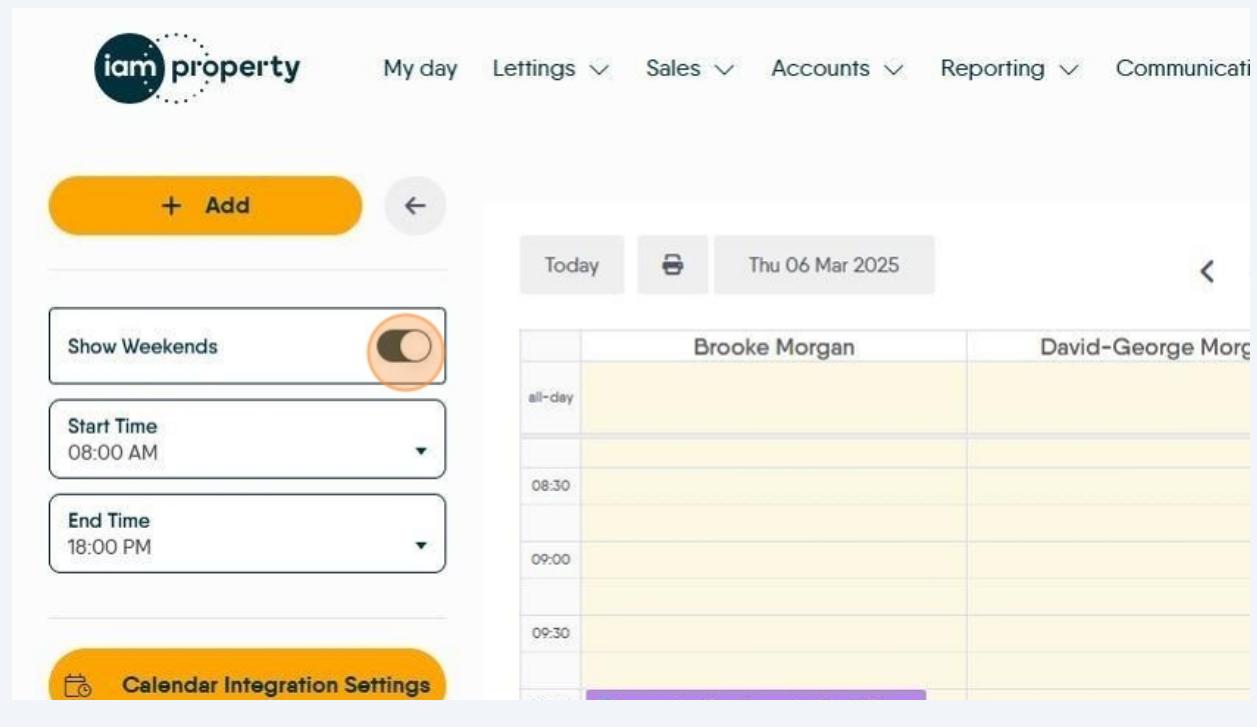
Configuring the CRM Calendar

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.



My day Lettings Sales Accounts Reporting Communicati

+ Add

Show Weekends

Start Time 08:00 AM

End Time 18:00 PM

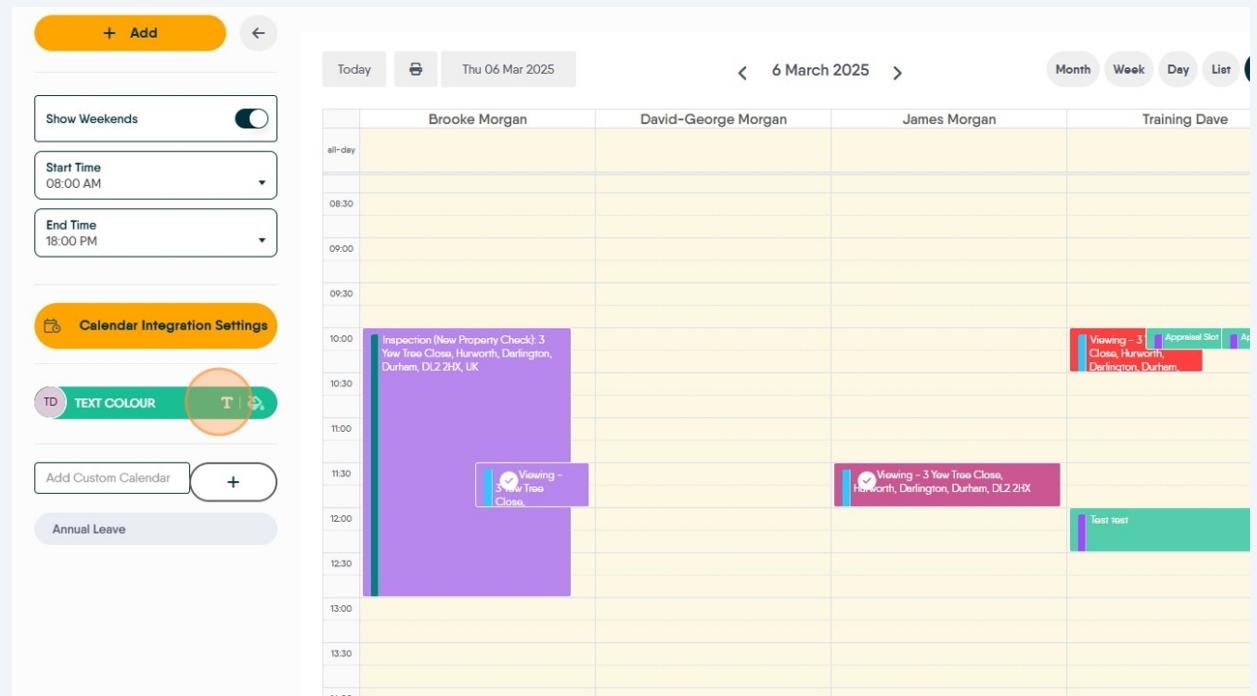
Calendar Integration Settings

Today Thu 06 Mar 2025

	Brooke Morgan	David-George Morgan
all-day		
08:30		
09:00		
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



+ Add

Show Weekends

Start Time 08:00 AM

End Time 18:00 PM

Calendar Integration Settings

TEXT COLOUR

Add Custom Calendar +

Annual Leave

Today Thu 06 Mar 2025

6 March 2025

Month Week Day List

	Brooke Morgan	David-George Morgan	James Morgan	Training Dave
all-day				
08:30				
09:00				
09:30				
10:00	Inspection (New Property Check): 3 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK			
10:30				
11:00				
11:30				
12:00				
12:30				
13:00				
13:30				

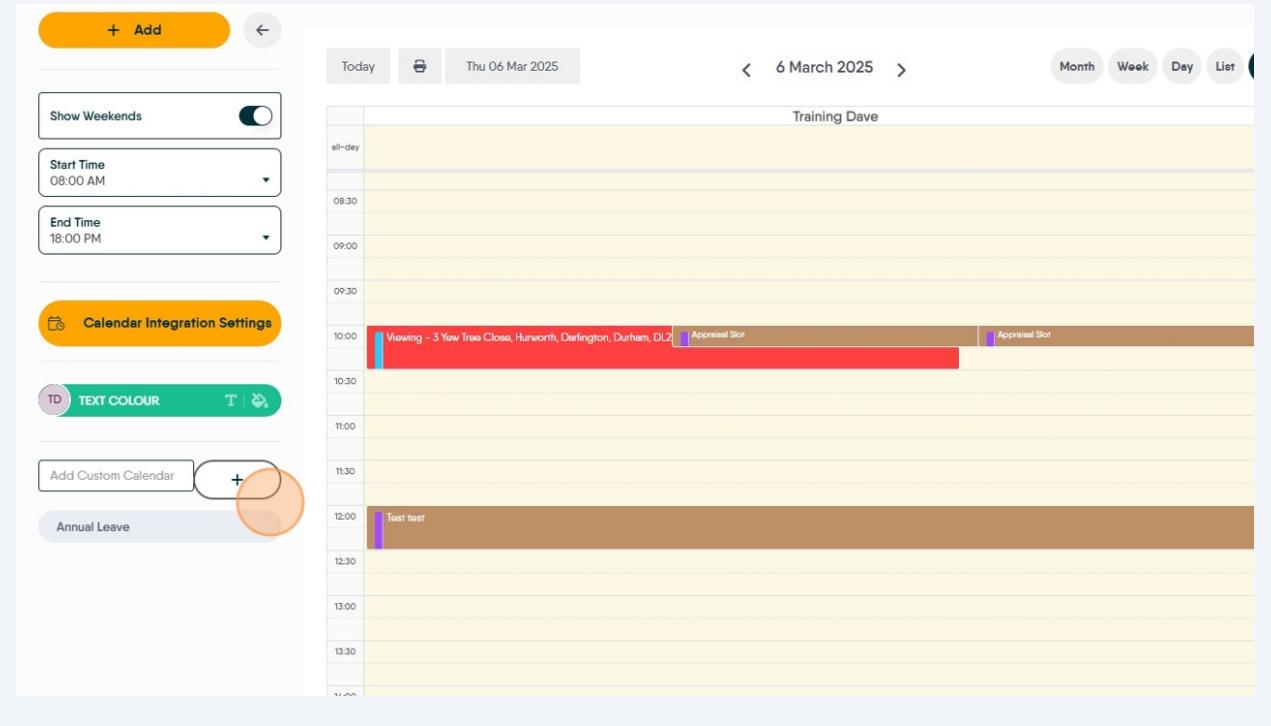
The screenshot shows the iamproperty software interface. At the top, there are navigation links: My day, Lettings, Sales, Accounts, Reporting, Communications, CRM, movebutler, and a user icon. Below the navigation, there is a search bar and a 'My acc' button. The main area features a color picker with a circular selection tool over a purple gradient. To the left of the color picker are input fields for 'Show Weekends' (checked), 'Start Time' (08:00 AM), and 'End Time' (18:00 PM). Below these are buttons for 'Calendar Integration Settings' and 'TEXT COLOUR'. A 'Text Colour' palette shows RGB values (255, 255, 255) and an alpha value (1). A color wheel is also present. On the right, a calendar view for March 2025 shows several events: 'Viewing - 3 Yew Tree Close, Hurnworth, Darlington, DL2 2HX' (purple box), 'Viewing - 3 Yew Tree Close, Hurnworth, Darlington, Durham, DL2 2HX' (purple box), and 'Test test' (green box). The calendar interface includes month, week, day, and list buttons at the top right.

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

This screenshot is similar to the one above but with a different background color. The color picker shows a teal gradient. The 'Text Colour' palette has new RGB values (25, 190, 146) and an alpha value (1). The calendar view on the right shows the same events as the previous screenshot, but the background color of the calendar grid is now a dark teal. The 'Text Colour' button is highlighted with a yellow circle.

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 your appointments.



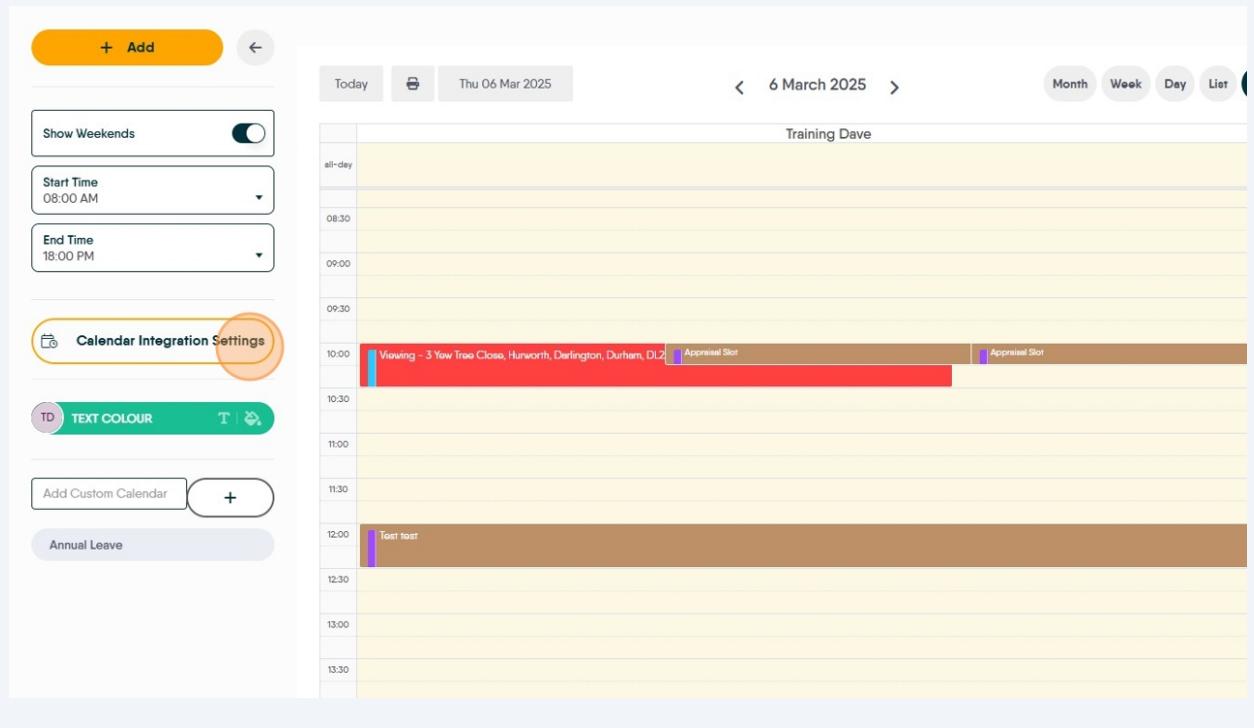
Integrating with Outlook or Google Calendars



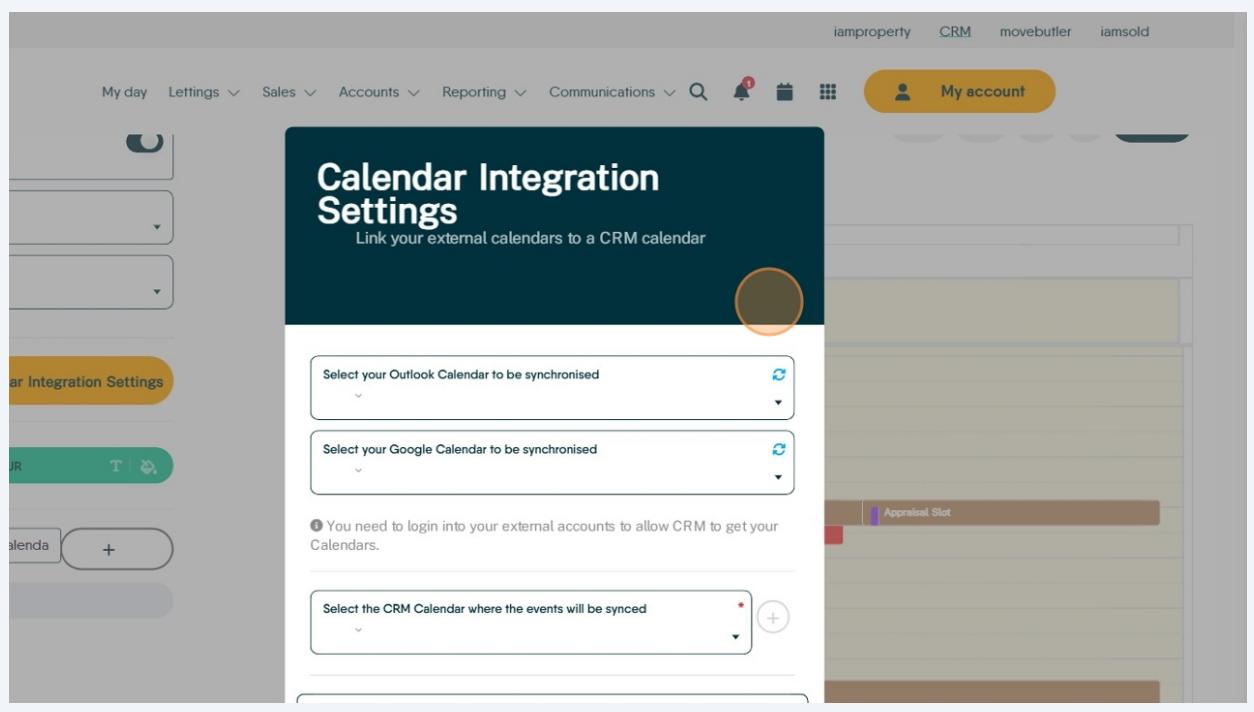
Alert! Before Integrating your Calendars check with your IT department to ensure permissions are in place to allow this.

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

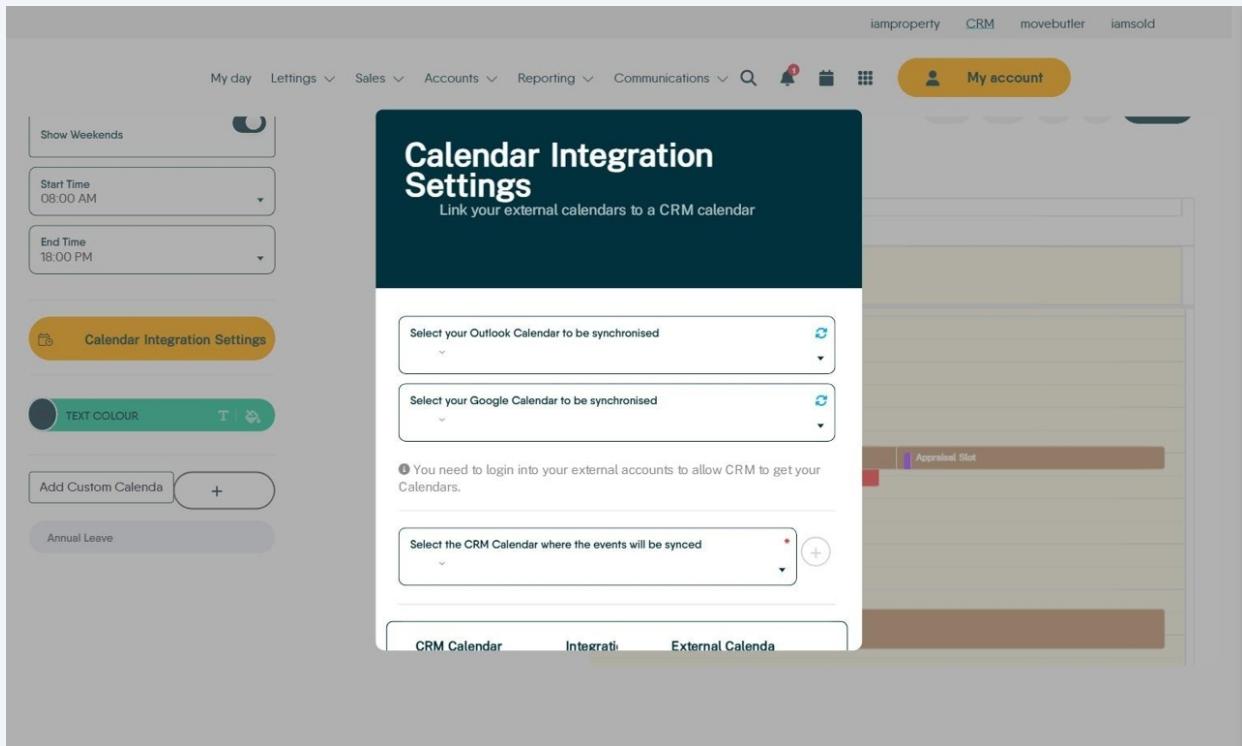
26 Click "Calendar Integration Settings"



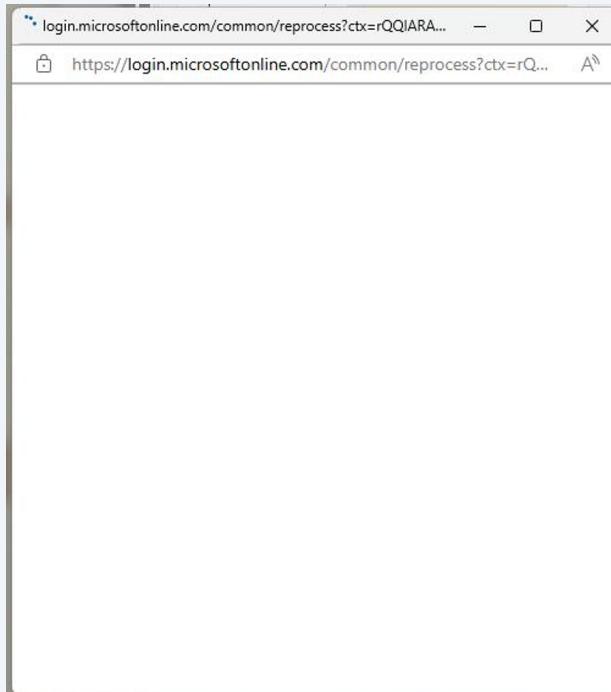
27 Click here.



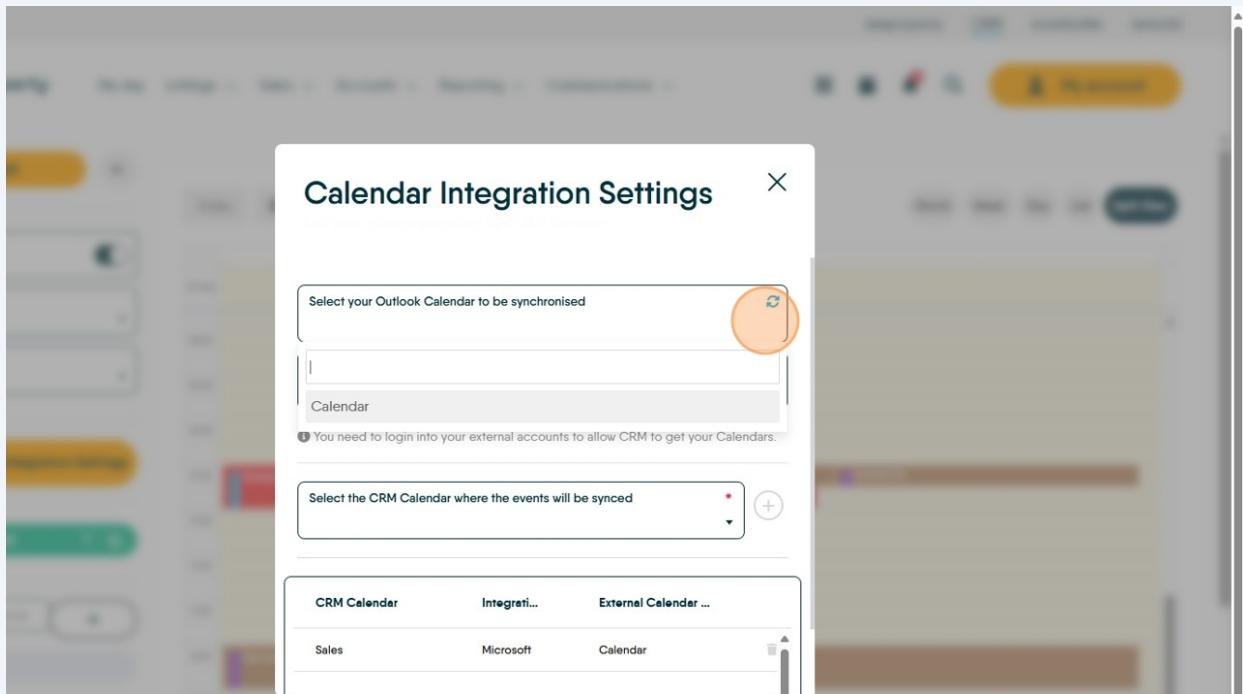
28 Click here.



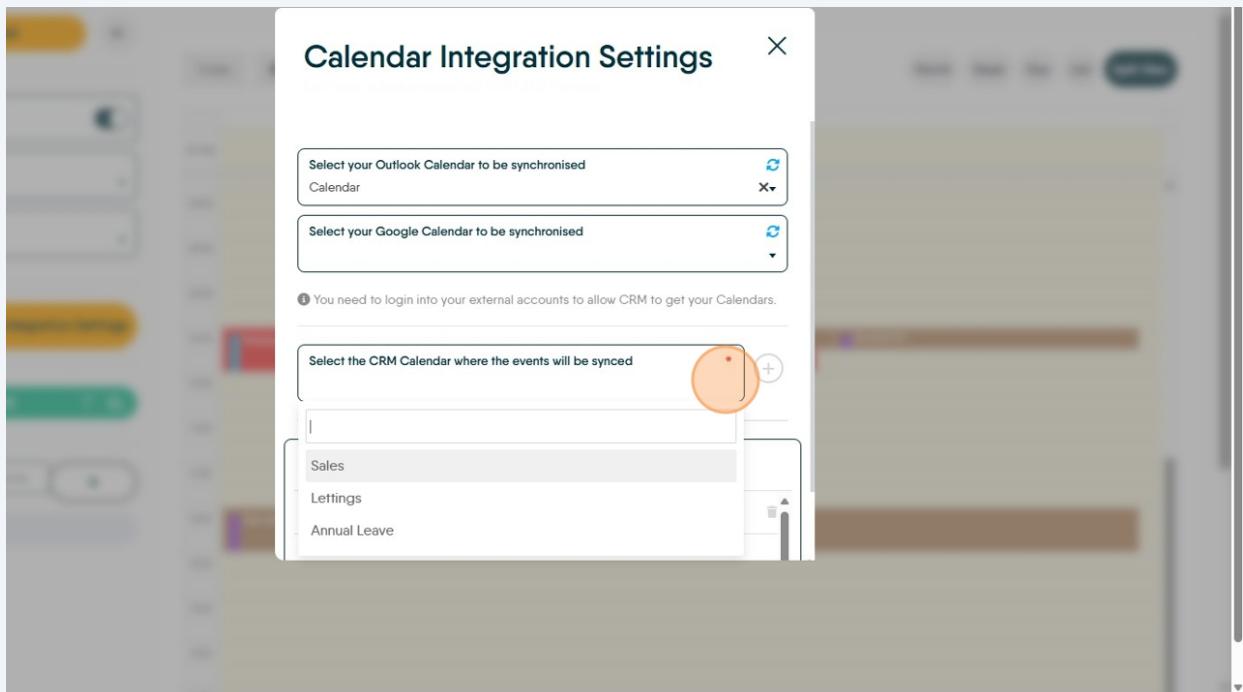
29 If you are using Outlook this screen will show, follow the instructions to sign in etc.



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

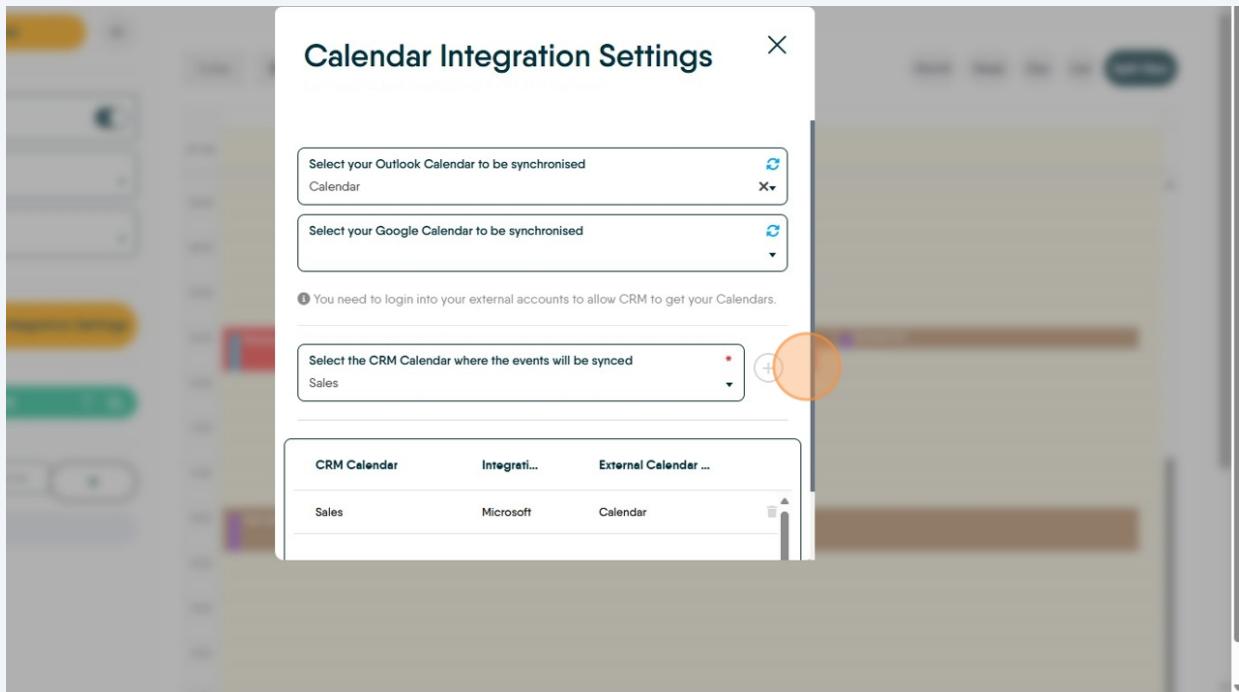


31 Click here and set the calendar that the synchronised information goes to.



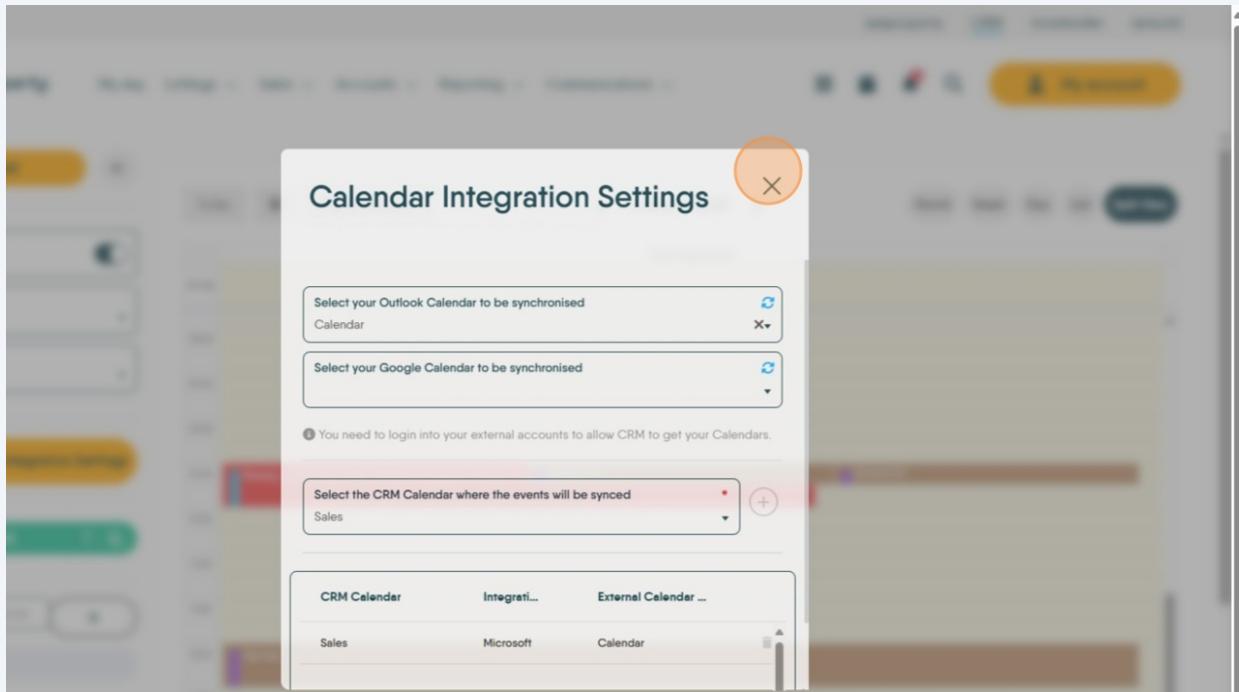
32

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

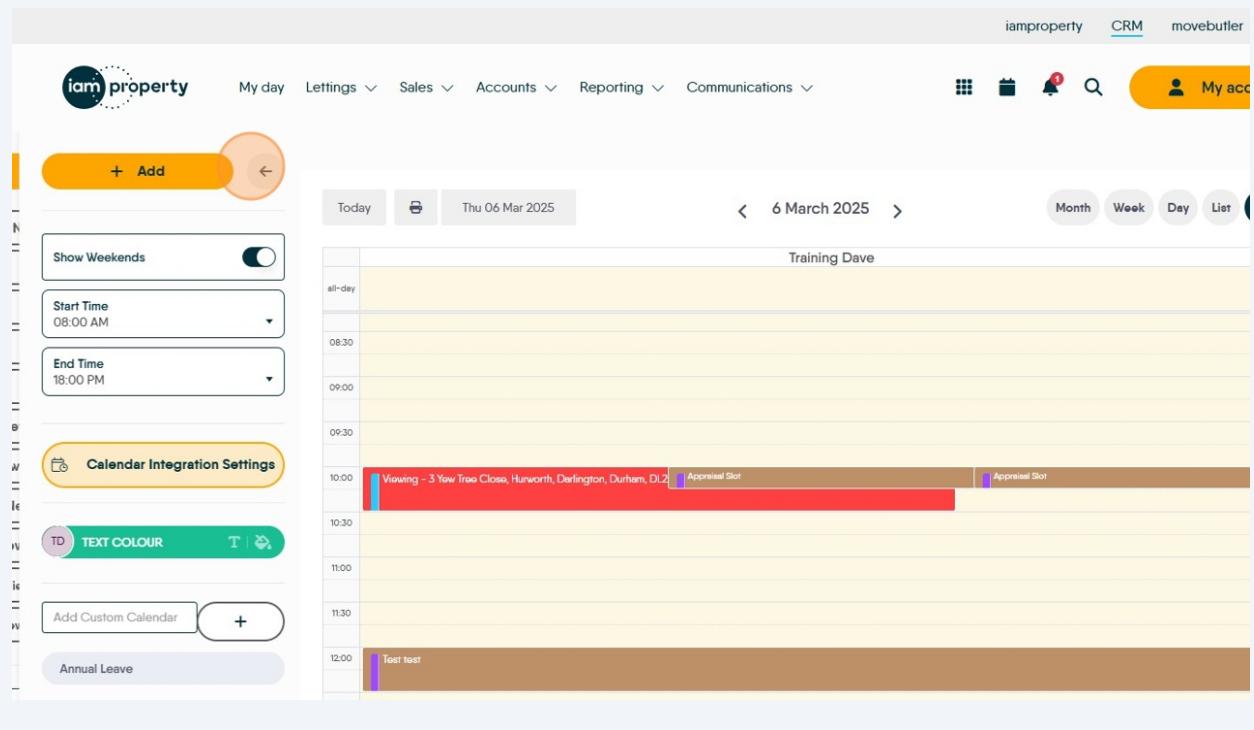


33

Click here to close this screen.

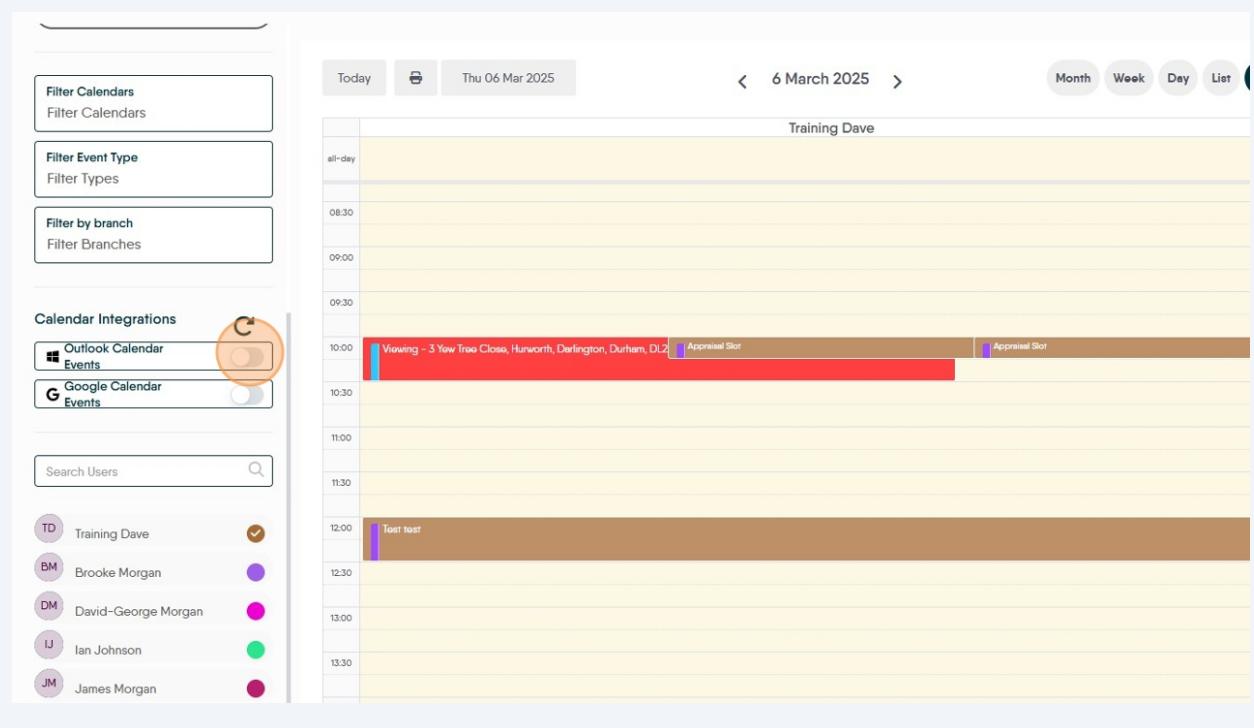


34 Click here to return to the initial calendar screen.



The screenshot shows the iamproperty calendar interface. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right, there are icons for 'CRM', 'movebutler', and user account information. The main area is a 'List' view for March 6, 2025. A yellow circle highlights the 'My day' button in the top left of the interface. The calendar shows several events: an all-day event from 08:00 to 18:00 labeled 'Training Dave'; a red event from 10:00 to 11:00 labeled 'Viewing - 3 Yew Tree Close, Hurworth, Darlington, Durham, DL2'; and a brown event from 12:00 to 13:00 labeled 'Test test'. There are also two purple 'Appraisal Slot' entries in the afternoon. On the left, there are settings for 'Show Weekends', 'Start Time' (08:00 AM), 'End Time' (18:00 PM), 'Calendar Integration Settings' (highlighted with a yellow circle), 'Text Colour' (TD), and 'Add Custom Calendar' (+). A 'Annual Leave' button is also present.

35 Click here to enable/disable the Calendar Integrations.



The screenshot shows the iamproperty calendar interface with a 'List' view for March 6, 2025. A yellow circle highlights the 'Outlook Calendar Events' toggle switch in the 'Calendar Integrations' section on the left. The calendar displays the same events as the previous screenshot: an all-day 'Training Dave' event, a red 'Viewing' event, a brown 'Test test' event, and two purple 'Appraisal Slot' events. On the left, there are filters for 'Filter Calendars', 'Filter Event Type', and 'Filter by branch'. Below these are sections for 'Calendar Integrations' (with 'Outlook Calendar Events' checked and 'Google Calendar Events' uncheckable), 'Search Users' (with a search bar and magnifying glass icon), and a list of users with colored status indicators (TD, BM, DM, IJ, JM).

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 shows the CRM calendar interface. On the left, there is a sidebar with the following sections:

- Filter Calendars**: Contains "Filter Calendars" and a "Refresh" button.
- Filter Event Type**: Contains "Filter Types".
- Filter by branch**: Contains "Filter Branches".
- Calendar Integrations**: Shows "Outlook Calendar Events" (checked) and "Google Calendar Events" (unchecked).
- Search Users**: A search bar with a magnifying glass icon.
- Recent Users**: A list of users with icons: Training Dave (checked), Brooke Morgan, David-George Morgan, and Ian Johnson.

The main area displays a calendar for **6 March 2025**. The calendar shows the following events:

- Training Dave** (all-day event from 08:30 to 13:30).
- Viewing - 3 Yew Tree Close, Heswall, Wirral, CH6 5LZ** (red event from 10:00 to 12:00, labeled "Appraisal Slot").
- Test test** (brown event from 12:00 to 13:00, labeled "Appraisal Slot").

At the top of the calendar, there are buttons for **Today**, **Thu 06 Mar 2025**, **< 6 March 2025 >**, and navigation icons for **Month**, **Week**, **Day**, and **List**.