

# Adding a Multi Property Viewing to the Sales or Lettings Calendar in CRM

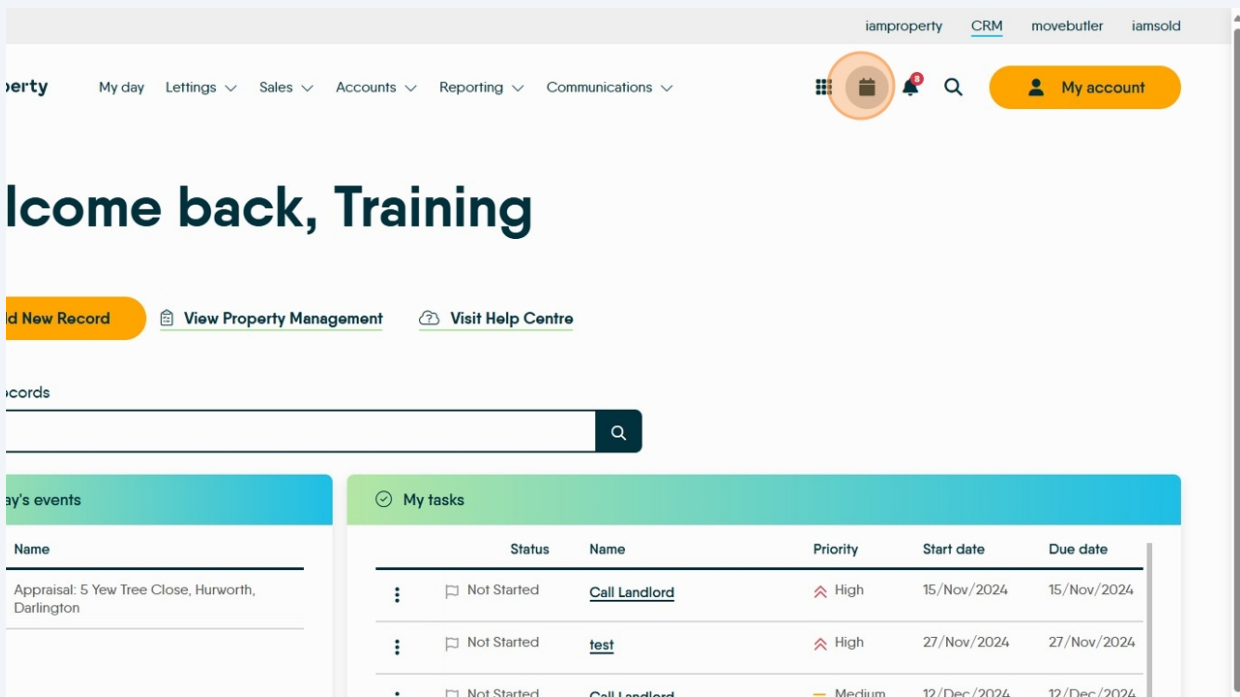


This guide provides a step-by-step process for adding a multi-property viewing to your calendar in the CRM system, ensuring efficient scheduling .

By following the instructions, users can seamlessly manage multiple property viewings in one place, enhancing organisation and productivity. It simplifies the booking process, making it easier for agents to coordinate with clients and streamline their sales or Lettings workflow.

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

2    Click "Calendar"



Tip! There are 2 places/ways to add a viewing to a Calendar, this guide will show both.

3

To create an appointment you can click "+ Add" and then click on the appropriate option. Depending on whether you are creating a new sales or lettings viewing.

OR

Right-click on the calendar screen, usually on the time and date you are planning the visit. Click "Sales" or "Lettings". Click "Add Viewing"

The image displays two screenshots of the iamproperty CRM interface, illustrating the process of creating an appointment.

**Top Screenshot:** The interface shows the "CRM" tab selected. The left sidebar contains a "+ Add" button (highlighted with an orange circle) and a "New Appointment +" button. Below these are filter options for "Filter Calendars", "Filter Event Type", and "Filter by branch". The main calendar area shows a view for "Tue 21 Jan 2025" with a time slot from 08:00 to 12:00. Two appointments are visible: "Appraisal Slot" and "Appraisal: 5 New Tree Close, Hurworth, Darlington".

**Bottom Screenshot:** This screenshot shows the same interface but with the "+ Add" button (highlighted with an orange circle) expanded to show a list of appointment options: "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) +", and "New Viewing Open House (Lettings) +". The "New Viewing (Sales) +" option is highlighted with an orange circle. The main calendar area is identical to the top screenshot.

+ 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

Filter Event Type

Filter Types

Filter by branch

Today

Tue 21 Jan 2025

< 21 January 2025 >

MonthWeekDayListSplit View

David-George 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

Appraisal Slot

Appraisal Slot

Appraisal: 5 Year Tree Close, Hurworth, Darlington

+ 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

Filter Event Type

Filter Types

Filter by branch

Today

Tue 21 Jan 2025

< 21 January 2025 >

MonthWeekDayListSplit View

David-George 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

Appraisal Slot

Appraisal Slot

Appraisal: 5 Year Tree Close, Hurworth, Darlington

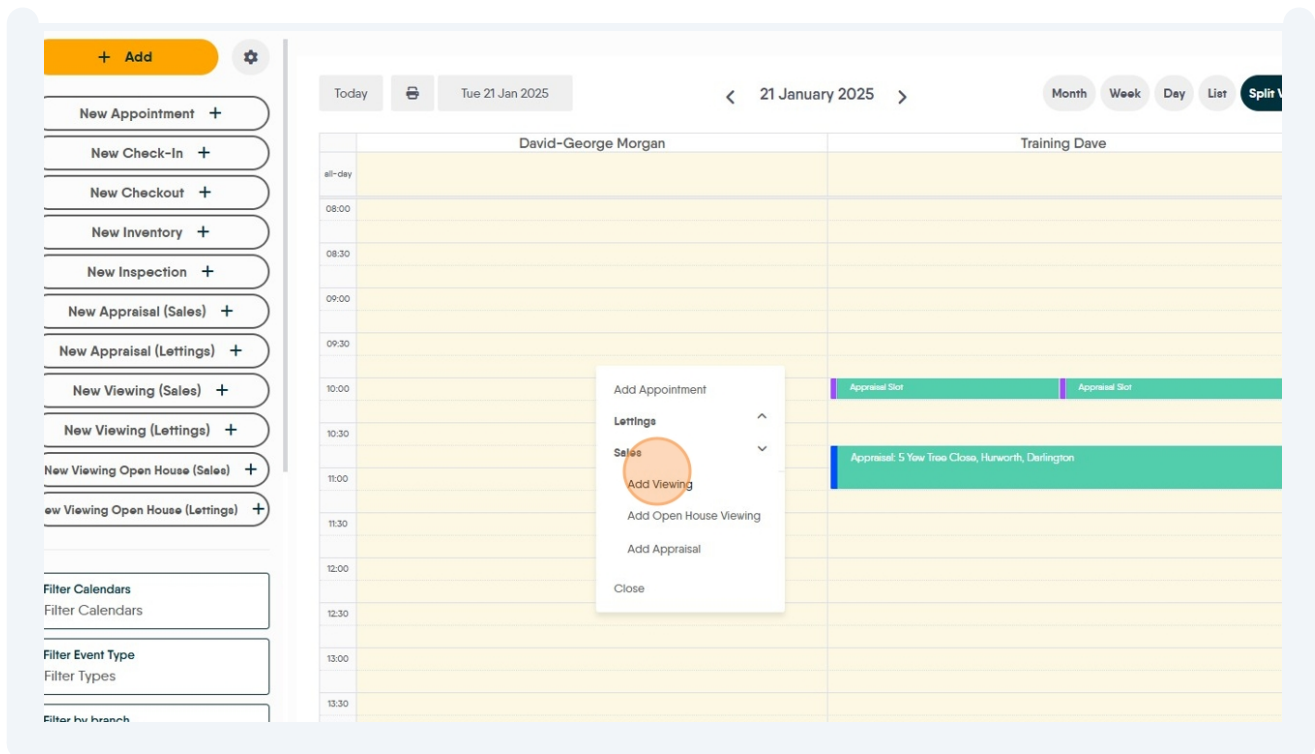
Add Appointment

Lettings

Sales

Close

3

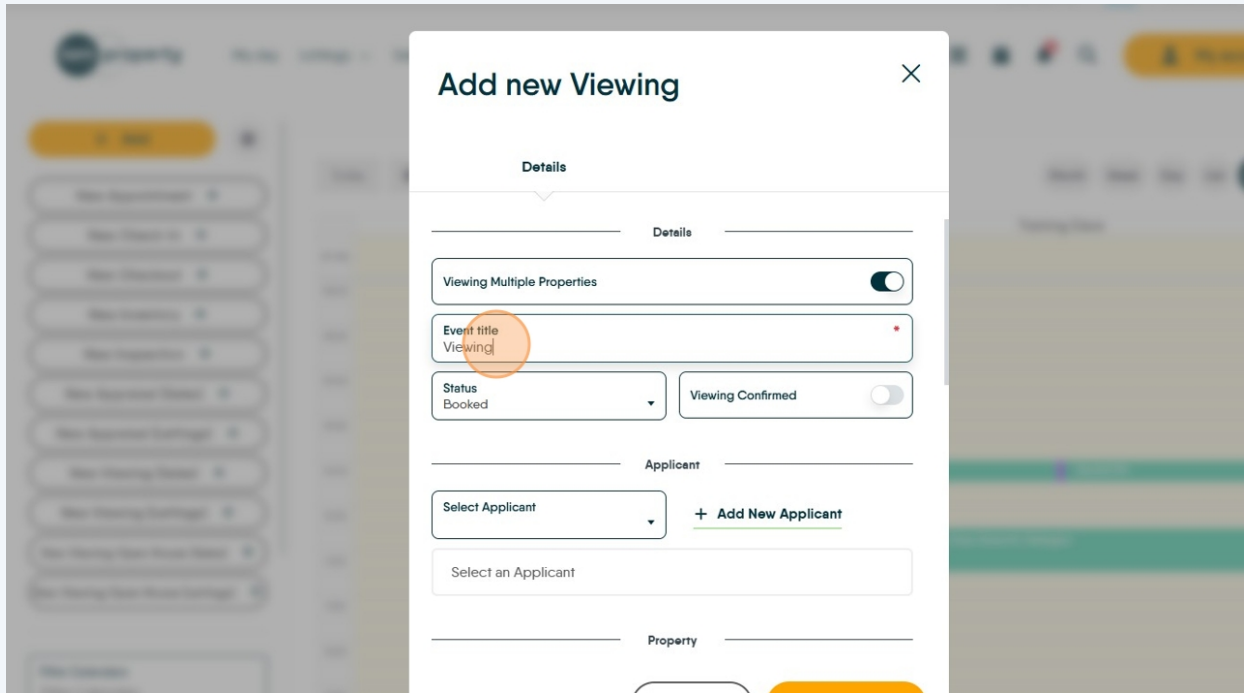


**i** From here the process is the same regardless of how you arrived at this 'Add New Viewing' page.

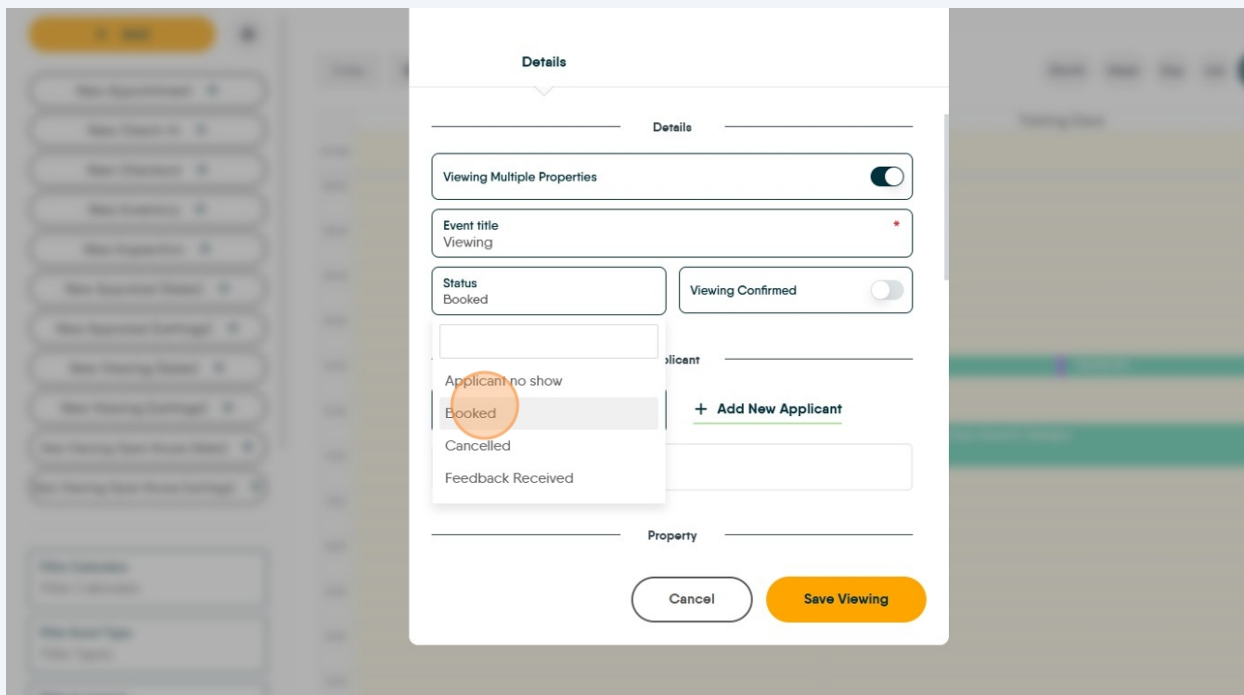
**4** Click here to enable the ability to add multiple properties.

The screenshot shows the 'Add new Viewing' form. It has a title bar with a close button. The form is divided into three main sections: Details, Applicant, and Property. In the Details section, there is a toggle switch for 'Viewing Multiple Properties' which is highlighted with an orange circle. Other fields in the Details section include 'Event title' (set to 'Viewing'), 'Status' (set to 'Booked'), and 'Viewing Confirmed' (a toggle switch). The Applicant section has a 'Select Applicant' dropdown and a '+ Add New Applicant' button. The Property section is partially visible at the bottom.

- 5 Click this text field and give the Viewing a more detailed title.

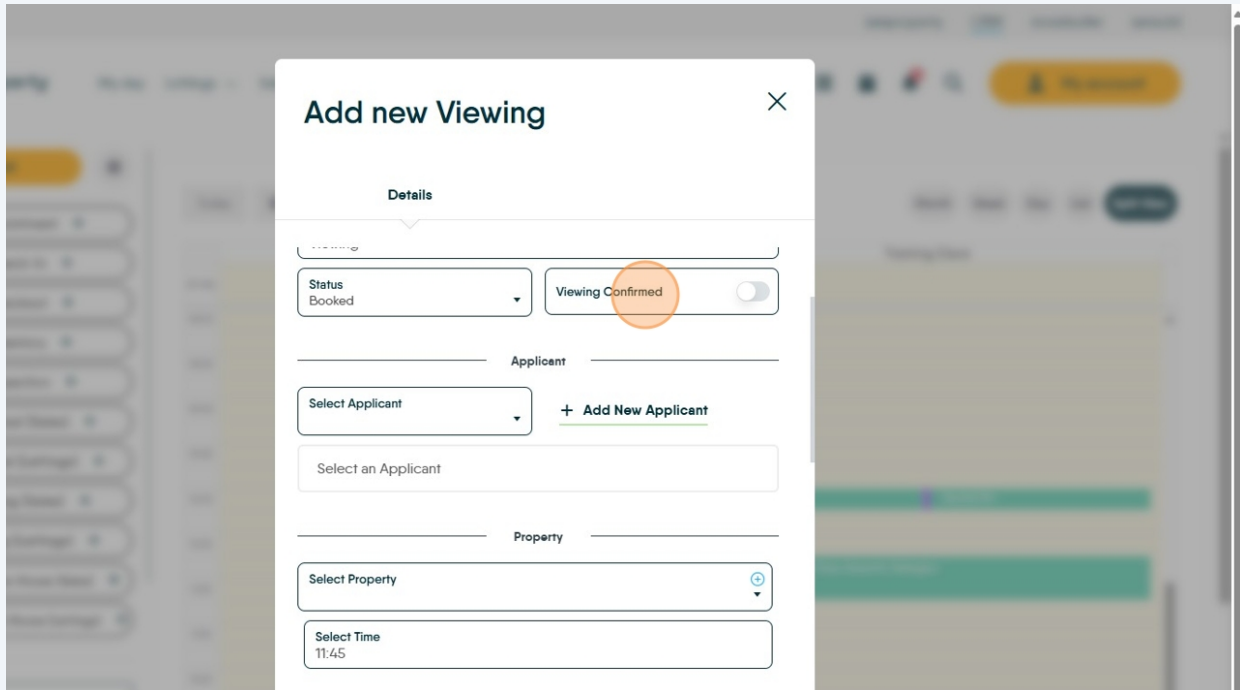


- 6 Click "Booked" or any other option (as appropriate) you have in this list.



7

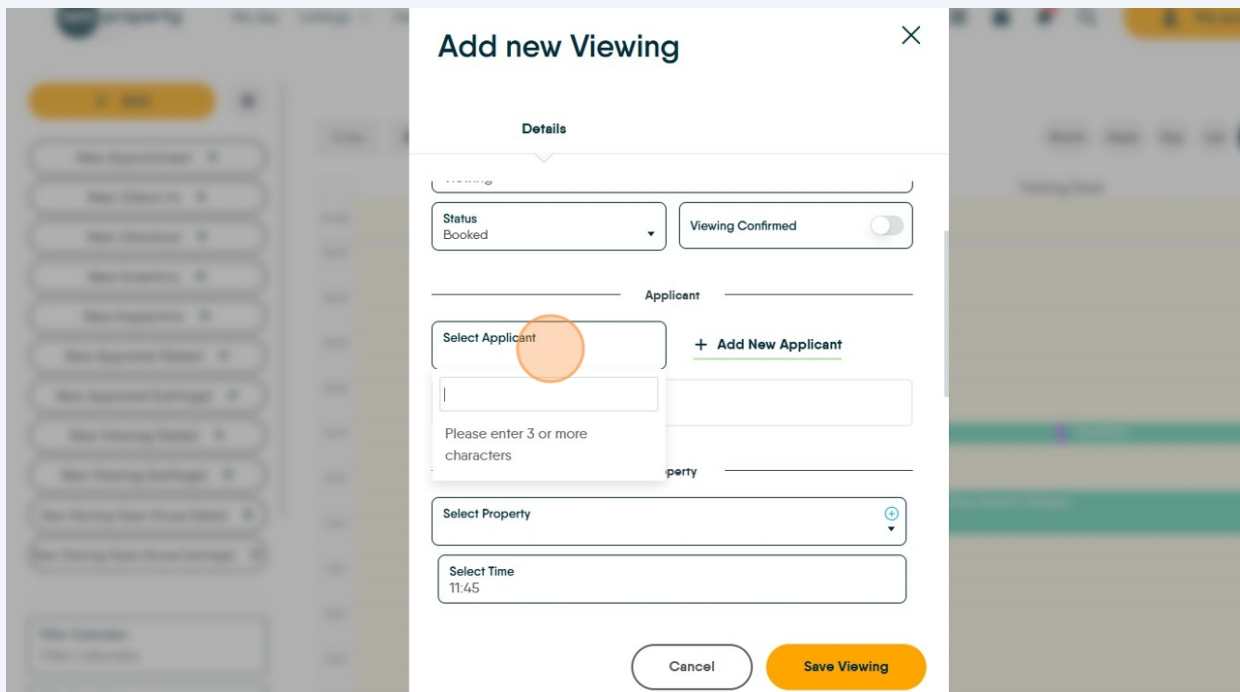
If the viewing dates and times are confirmed click here. Otherwise select this option once all the appointments are confirmed.



The screenshot shows the 'Add new Viewing' modal form. The 'Details' section is expanded, showing a 'Status' dropdown set to 'Booked' and a 'Viewing Confirmed' toggle switch. The toggle switch is highlighted with an orange circle. Below this, the 'Applicant' section has a 'Select Applicant' dropdown and a '+ Add New Applicant' link. The 'Property' section has a 'Select Property' dropdown and a 'Select Time' field set to '11:45'.

8

Click here and add your applicant details, either search for an existing Applicant or use the option to add a new applicant.



The screenshot shows the 'Add new Viewing' modal form. The 'Applicant' section is highlighted with an orange circle. The 'Select Applicant' dropdown is open, showing a search bar with the placeholder text 'Please enter 3 or more characters'. To the right of the dropdown is a '+ Add New Applicant' link. Below the 'Applicant' section, the 'Property' section has a 'Select Property' dropdown and a 'Select Time' field set to '11:45'. At the bottom of the form are 'Cancel' and 'Save Viewing' buttons.



9

Click here to select the property to be viewed, or click the blue + to add a new property

The screenshot shows a 'Details' form with three main sections: 'Viewing', 'Applicant', and 'Property'. The 'Viewing' section has a 'Status' dropdown set to 'Booked' and a 'Viewing Confirmed' toggle switch. The 'Applicant' section has a 'Select Applicant' dropdown set to 'Mr Sales Applicant11' and a '+ Add New Applicant' link. Below this is a card for 'Mr Sales Applicant11' with contact details and three action links: 'Add new call', 'Send SMS', and 'Send Email'. The 'Property' section has a 'Select Property' dropdown, which is highlighted with an orange circle. Below the dropdown is a text input field with the placeholder 'Please enter 3 or more characters'.

10

Once the property is added click "Add"

This screenshot shows the same 'Details' form as the previous one, but with the 'Property' section updated. The 'Select Property' dropdown now shows a selected property: '5 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK'. At the bottom of the form, there are two buttons: 'Cancel' and 'Save Viewing'.

**Add new Viewing**

**Details**

**Property**

Select Property  
5 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK

Select Time  
11:45

**Add**

Select a Property

**Appointment**

Start Time  
Tue 21 Jan 2025 11:45

End Time  
Tue 21 Jan 2025 12:15

Cancel **Save Viewing**

- 11** Then repeat to add the next property and set the time for that next appointment

**Add new Viewing**

Please enter 3 or more characters

**Property**

Select Property

Select Time  
11:45

**Add**

1. 5 Yew Tree Close 11:45

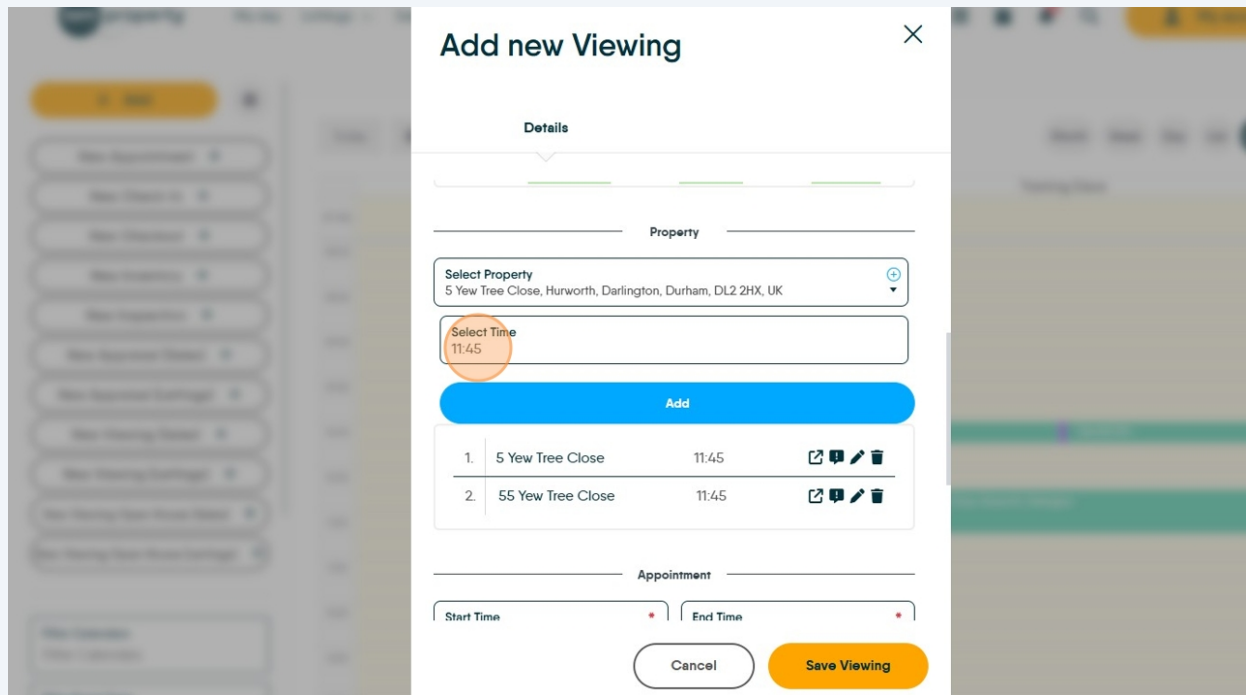
**Appointment**

Start Time  
Tue 21 Jan 2025 11:45

End Time  
Tue 21 Jan 2025 12:15



12 Click the "Select Time" field.



The screenshot shows a mobile application interface for adding a new viewing. The form is titled "Add new Viewing" and has a close button (X) in the top right corner. It is divided into two main sections: "Details" and "Appointment".

**Details Section:**

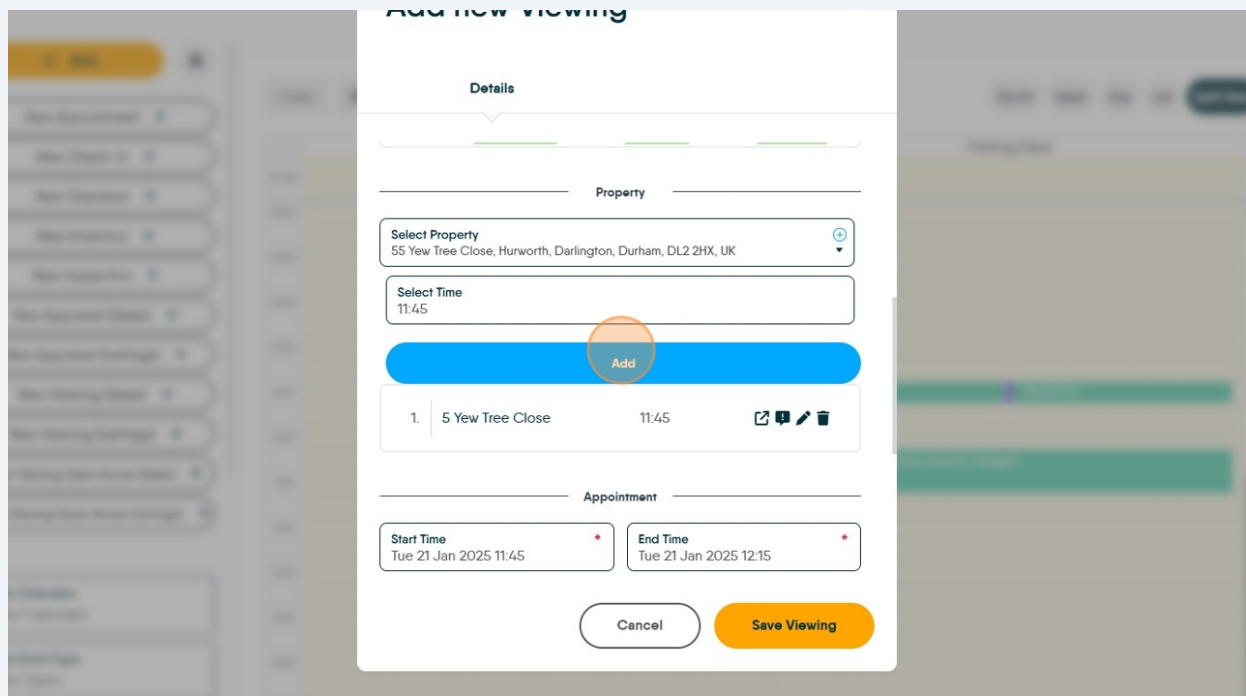
- Property:** A dropdown menu labeled "Select Property" with the text "5 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK".
- Select Time:** A text input field containing "11:45", which is highlighted with an orange circle.
- Add:** A large blue button labeled "Add".
- Table:** A table with two rows of data:

	Property	Time	Actions
1.	5 Yew Tree Close	11:45	[Share] [Calendar] [Edit] [Delete]
2.	55 Yew Tree Close	11:45	[Share] [Calendar] [Edit] [Delete]

**Appointment Section:**

- Start Time:** A text input field with a red asterisk, currently empty.
- End Time:** A text input field with a red asterisk, currently empty.
- Buttons:** "Cancel" and "Save Viewing" buttons at the bottom.

13 Click "Add"



The screenshot shows the same "Add new Viewing" form, but now the "Add" button is highlighted with an orange circle. The "Select Time" field is no longer highlighted.

**Details Section:**

- Property:** A dropdown menu labeled "Select Property" with the text "55 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK".
- Select Time:** A text input field containing "11:45".
- Add:** A large blue button labeled "Add", highlighted with an orange circle.
- Table:** A table with one row of data:

	Property	Time	Actions
1.	5 Yew Tree Close	11:45	[Share] [Calendar] [Edit] [Delete]

**Appointment Section:**

- Start Time:** A text input field with a red asterisk, containing "Tue 21 Jan 2025 11:45".
- End Time:** A text input field with a red asterisk, containing "Tue 21 Jan 2025 12:15".
- Buttons:** "Cancel" and "Save Viewing" buttons at the bottom.



If you are booking multiple appointments for the same day, make sure you extend the end time of the appointment to the expected end time of the day, otherwise you will not be able to add appointments once the end time is reached. E.G. if the day is planned for 10:00 - 15:00 you will not be able to add an appointment past 15:00 without changing the end time for the appointment.

14

continue adding properties until completed. If you have added the incorrect timing or not allowed for travel, click on the 'pencil' icon to the right to edit the appointment.

**Add new Viewing** [X]

[Search Bar]  
Please enter 3 or more characters

**Property**

Select Property [Dropdown Menu]

Select Time  
11:45

**Add**

1.	5 Yew Tree Close	11:45	[Icons: Link, Print, Edit, Delete]
2.	55 Yew Tree Close	11:45	[Icons: Link, Print, Edit, Delete]

**Appointment**

Start Time \* End Time \*

- 15 Click here to edit the time. Click Apply to set the time.

The screenshot shows the 'Add new viewing' form with the 'Details' section active. The 'Property' field is set to '5 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK'. The 'Select Time' field shows '11:45'. A time picker is open, displaying a grid with hours 10, 11, 12 and minutes 45, 44, 45. The '44' minute is highlighted, and an orange circle is drawn around the 'Add' button next to it. Below the time picker are 'Cancel' and 'Apply' buttons. At the bottom of the form are 'Start Time', 'End Time' fields, and 'Cancel' and 'Save Viewing' buttons.

Property		
Select Property 5 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK		
Select Time 11:45		
10	11	12
45	44	45
Add		
Cancel Apply 11:45		
2.	55 Yew Tree Close	11:45

Appointment		
Start Time	*	End Time *
Cancel Save Viewing		

- 16 Click "Add"

The screenshot shows the 'Add new viewing' form with the 'Details' section active. The 'Property' field is set to '5 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK'. The 'Select Time' field shows '11:55'. The 'Add' button is highlighted with an orange circle. Below the 'Add' button is a table listing the viewing details. At the bottom of the form are 'Start Time', 'End Time' fields, and 'Cancel' and 'Save Viewing' buttons.

Property		
Select Property 5 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK		
Select Time 11:55		
Add		
1.	5 Yew Tree Close	11:45
2.	55 Yew Tree Close	11:45

Appointment		
Start Time	*	End Time *
Cancel Save Viewing		

- 17 Click this text field to extend the appointment time if required.

The screenshot shows the 'Add new Viewing' form with the 'Appointment' section expanded. The 'End Time' field, which contains 'Tue 21 Jan 2025 12:45', is highlighted with an orange circle. Other fields include 'Start Time' (Tue 21 Jan 2025 11:45), 'Select Calendar' (Sales), 'Reminder' (No reminder), 'Assign to users' (David-George Morgan), 'Select Branch' (Morgan & Co), and 'Meet At'.

- 18 Once all the visits are set and timings corrected (if required) Click this search field and select the calendar you are adding the appointments to

The screenshot shows the 'Add new Viewing' form with the 'Select Calendar' field highlighted by an orange circle. The 'Appointment' section is expanded, showing 'Start Time' (Tue 21 Jan 2025 11:45) and 'End Time' (Tue 21 Jan 2025 12:45). A calendar widget for January 2025 is open, showing the 21st as the selected date. The 'Assign to users' field shows 'David-George Morgan' and the 'Select Branch' field shows 'Morgan & Co'. The 'Meet At' field is partially visible at the bottom.

19 Click to set a reminder for yourself (if required)

The screenshot shows a 'Details' form for an appointment. The form has a title bar 'Details' and a section 'Appointment'. It includes fields for 'Start Time' (Tue 21 Jan 2025 11:45) and 'End Time' (Tue 21 Jan 2025 12:45). Below these is a 'Select Calendar' dropdown with the text 'Select calendar to assign to'. The 'Reminder' field is currently set to 'No reminder', and its dropdown menu is open, showing options: 'No reminder', '5 minute(s) before', '10 minute(s) before', '15 minute(s) before', '30 minute(s) before', and '1 hour(s) before'. An orange circle highlights the 'Reminder' field. At the bottom of the form are 'Cancel' and 'Save Viewing' buttons.

20 Click and select the users performing the viewing.

The screenshot shows the same 'Details' form for an appointment. The 'Assign to users' field is now highlighted with an orange circle and contains the text 'David-George Morgan' with a close button 'X'. The 'Reminder' field is now closed and set to 'No reminder'. The 'Select Calendar' field is still open. The 'Select Branch' field is set to 'Morgan & Co' and the 'Accompanied' toggle is turned off. The 'Meet At' field is empty. The 'Cancel' and 'Save Viewing' buttons are at the bottom.

21

Check the Branch is correct, if the appointment is accompanied select that option and note where you are meeting the client. e.g. Click "Estate agents"

The screenshot shows a 'Details' modal for an appointment. The 'Appointment' section includes the following fields:

- Start Time:** Tue 21 Jan 2025 11:45
- End Time:** Tue 21 Jan 2025 12:45
- Select Calendar:** Select calendar to assign to
- Reminder:** No reminder
- Assign to users:** David-George Morgan
- Select Branch:** Morgan & Co
- Accompanied:** Toggle switch is turned on
- Meet At:** Estate agents (highlighted with an orange circle)

At the bottom are 'Cancel' and 'Save Viewing' buttons.

22

Click "Save Viewing" and the viewing will be added to the Calendar. The viewing will also show in the Property and the Applicant screens within the CRM.

This screenshot shows the same 'Details' modal, but with different values and a highlighted 'Save Viewing' button:

- Start Time:** Wed 12 Feb 2025 14:15
- End Time:** Wed 12 Feb 2025 14:45
- Select Calendar:** Sales
- Reminder:** No reminder
- Assign to users:** (Empty)
- Select Branch:** Morgan & Co
- Accompanied:** Toggle switch is turned on
- Meet At:** Estate agents

The 'Save Viewing' button at the bottom right is highlighted with an orange circle.