

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 software interface, illustrating the process of creating a viewing appointment.

Top Screenshot: This screenshot shows the main calendar view for Tuesday, 21 January 2025. The interface includes a sidebar with various filtering and integration options, such as "Filter Calendars", "Filter Event Type", and "Calendar Integrations" for Outlook and Google. The main calendar grid shows a yellow slot for "David-George Morgan" and a green slot for "Training Dave". A specific green slot at 11:00 is labeled "Appraisal: 5 Yew Tree Close, Hurworth, Darlington".

Bottom Screenshot: This screenshot shows the same calendar view, but with a different set of sidebar options. The "New Viewing (Sales) +" button is highlighted with an orange circle. The main calendar grid shows the same slots as the top screenshot, with the 11:00 slot again labeled "Appraisal: 5 Yew Tree Close, Hurworth, Darlington".

Today  Tue 21 Jan 2025  21 January 2025  Month Week Day List Split 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		

+ 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) +

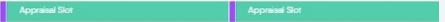
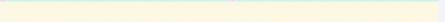
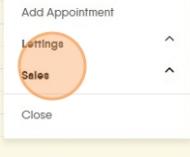
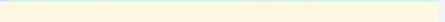
New Viewing Open House (Lettings) +

Filter Calendars

Filter Event Type

Filter by branch

Today  Tue 21 Jan 2025  21 January 2025  Month Week Day List Split 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		

+ 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 Event Type

Filter by branch

The screenshot shows a software interface for managing property viewings. On the left, a sidebar contains buttons for '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)'. Below these are filters for 'Filter Calendars', 'Filter Event Type', and 'Filter by branch'. The main area is a calendar for Tuesday, January 21, 2025. A context menu is open over a viewing slot at 11:00 for 'David-George Morgan'. The menu options are: 'Add Appointment', 'Lettings', 'Sales' (which is highlighted with a red circle), 'Add Viewing', 'Add Open House Viewing', 'Add Appraisal', and 'Close'. The bottom right of the calendar shows a note: 'Appraisal: 5 Yew Tree Close, Hurworth, Darlington'.



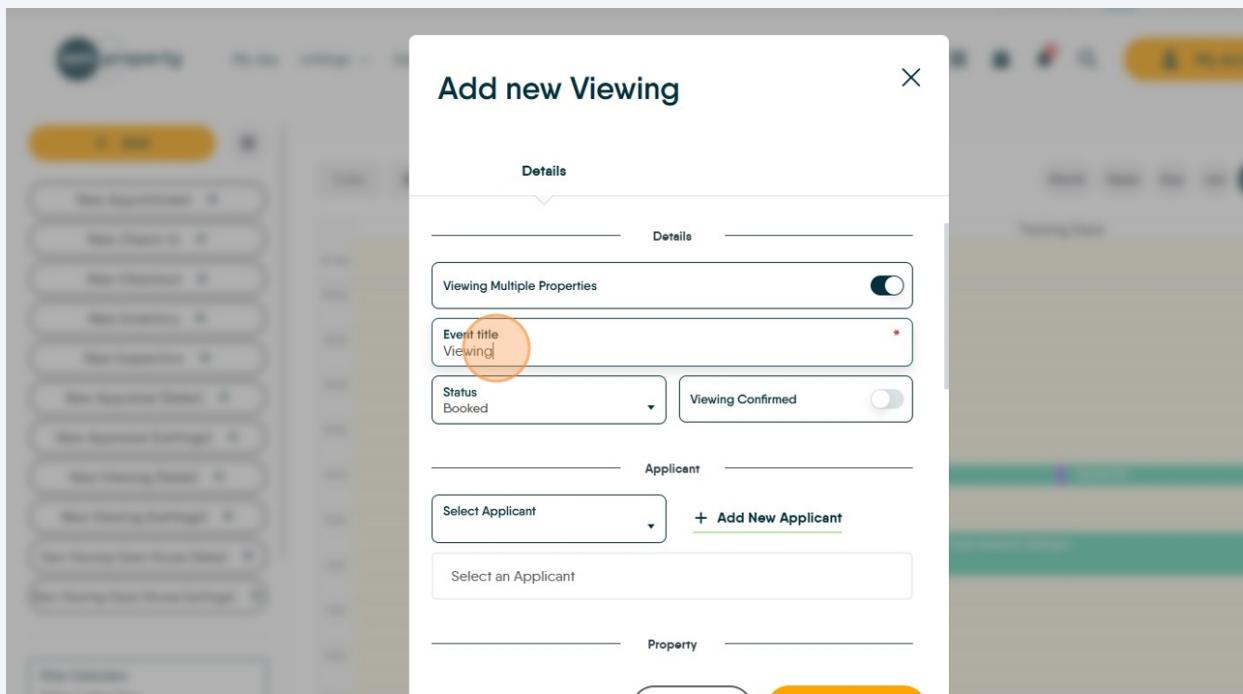
From here the process is the same regardless of how you arrived at this 'Add New Viewing' page.

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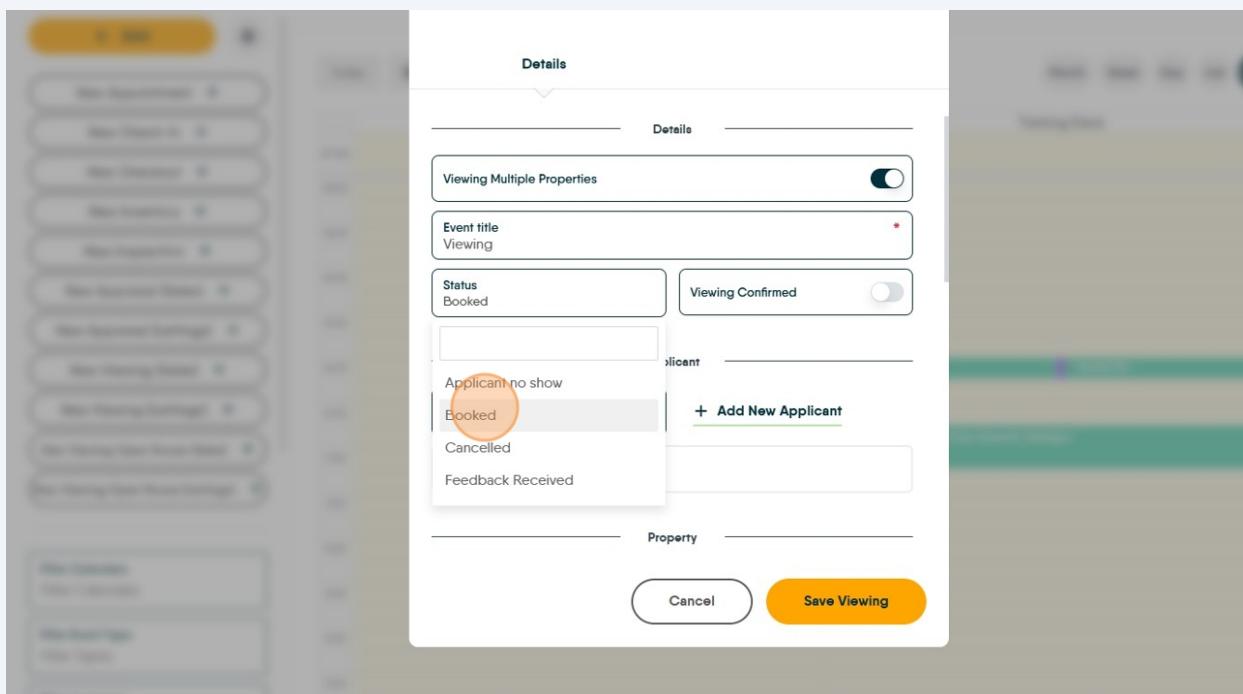
Click here to enable the ability to add multiple properties.

The screenshot shows the 'Add new Viewing' dialog box. At the top, it says 'Add new Viewing' with a close button 'X'. The dialog is divided into sections: 'Details', 'Applicant', and 'Property'. In the 'Details' section, there is a toggle switch labeled 'Viewing Multiple Properties' which is currently turned off (unchecked). Below it is a field for 'Event title' with the value 'Viewing'. There are dropdowns for 'Status' (set to 'Booked') and 'Viewing Confirmed' (which is turned off). In the 'Applicant' section, there is a dropdown for 'Select Applicant' and a link '+ Add New Applicant'. In the 'Property' section, there is a field 'Select an Applicant'.

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

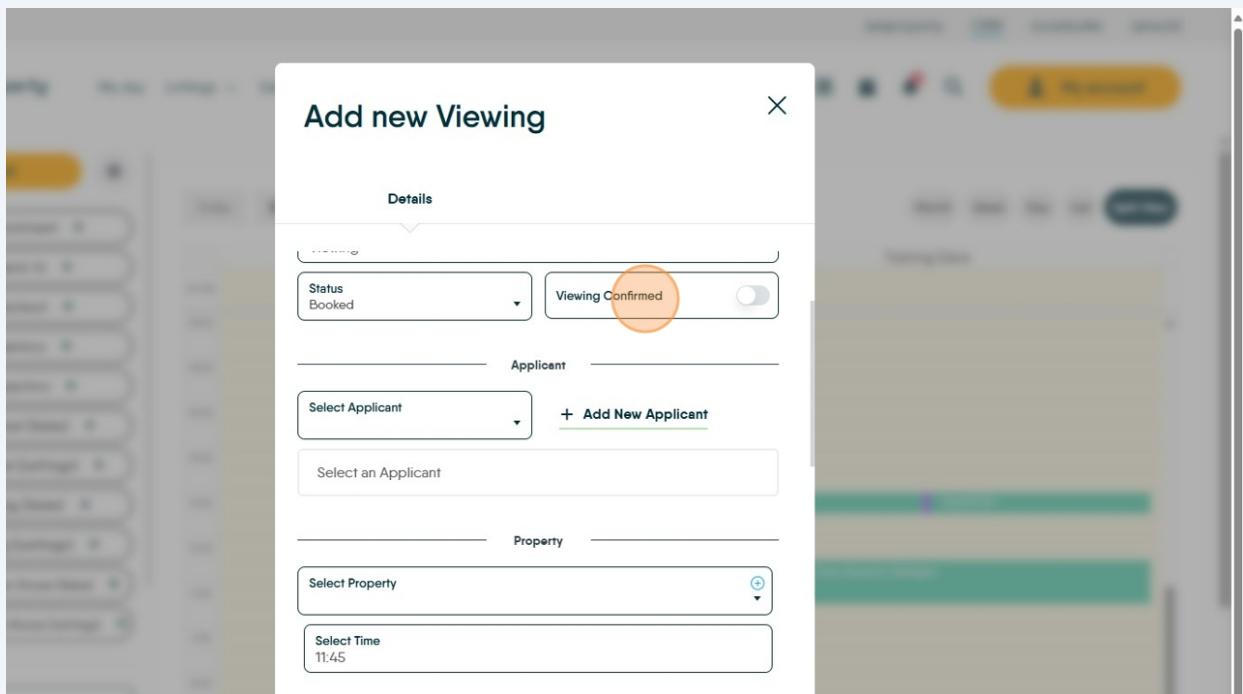


6 Click "Booked" or any other option (as appropriate) you have in this list.



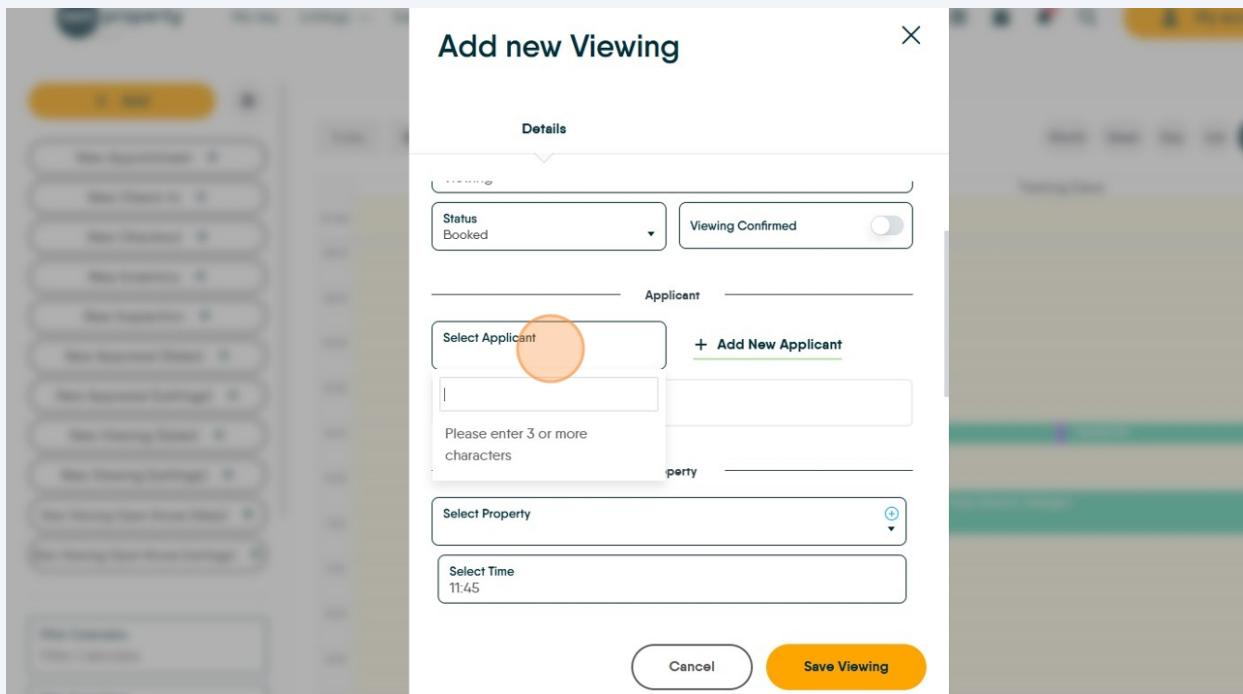
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If the viewing dates and times are confirmed click here. Otherwise select this option once all the appointments are confirmed.



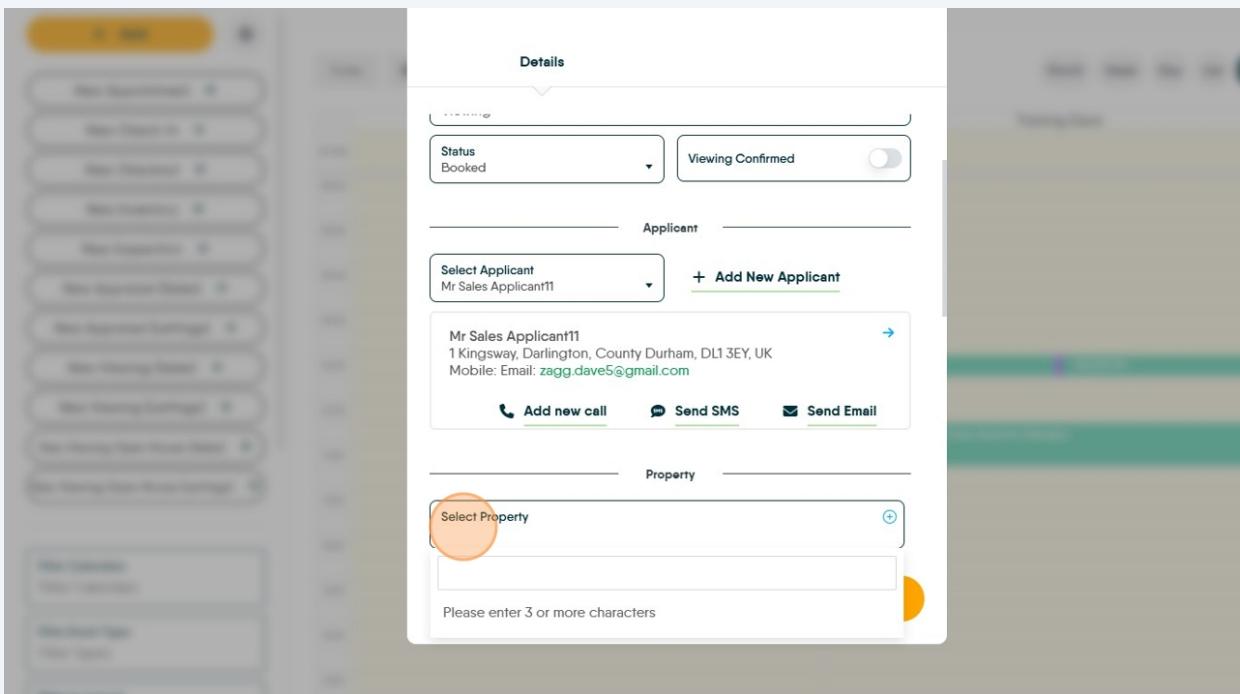
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Click here and add your applicant details, either search for an existing Applicant or use the option to add a new applicant.



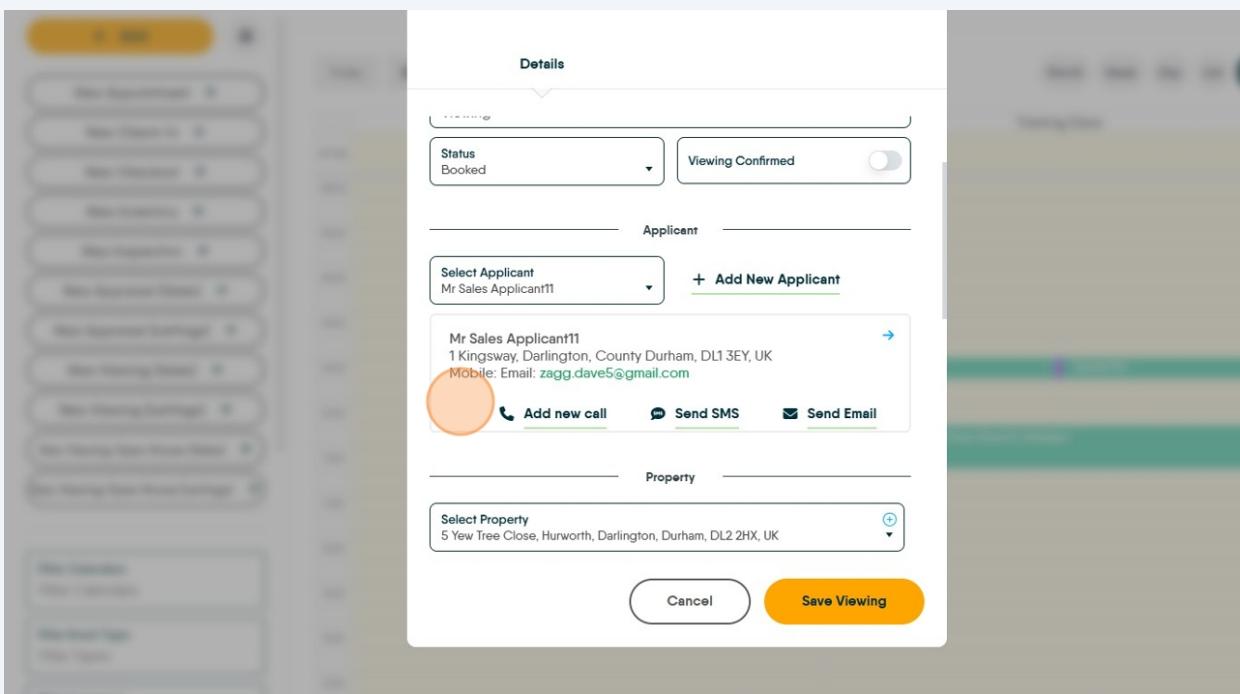
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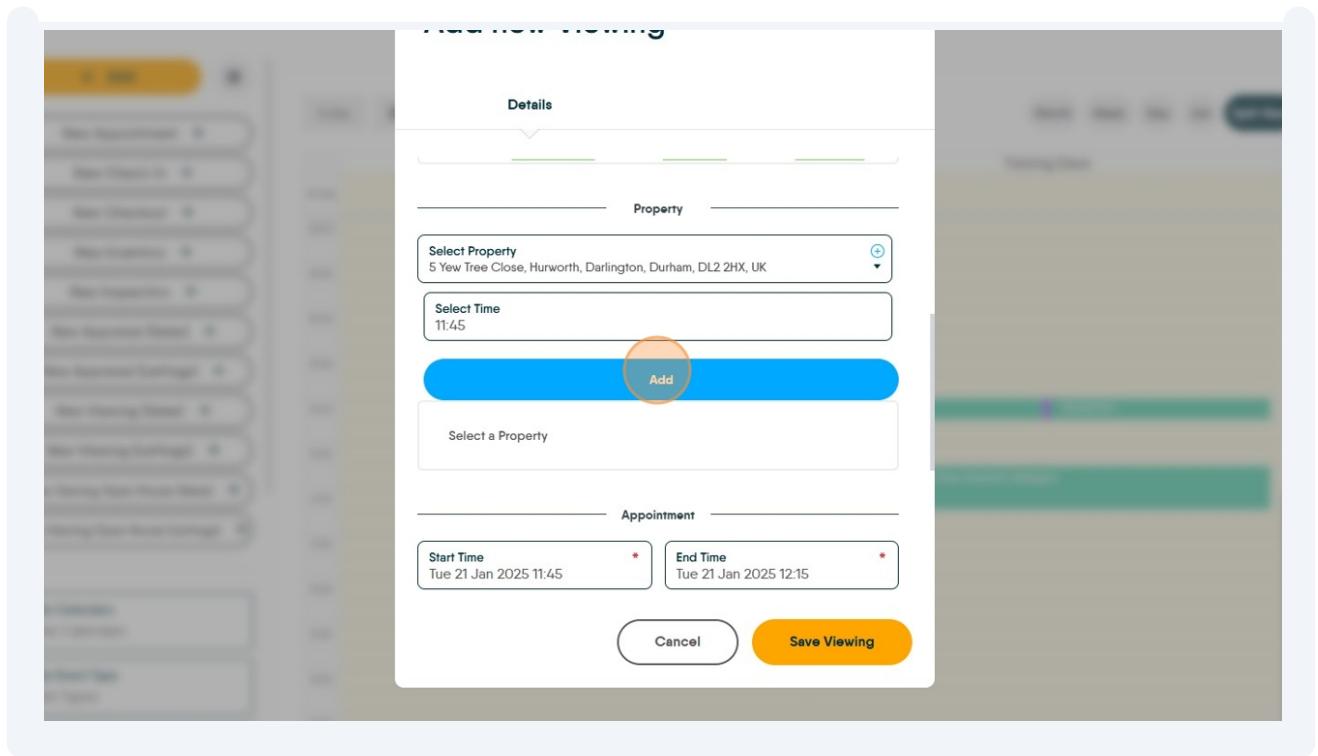
Click here to select the property to be viewed, or click the blue + to add a new property



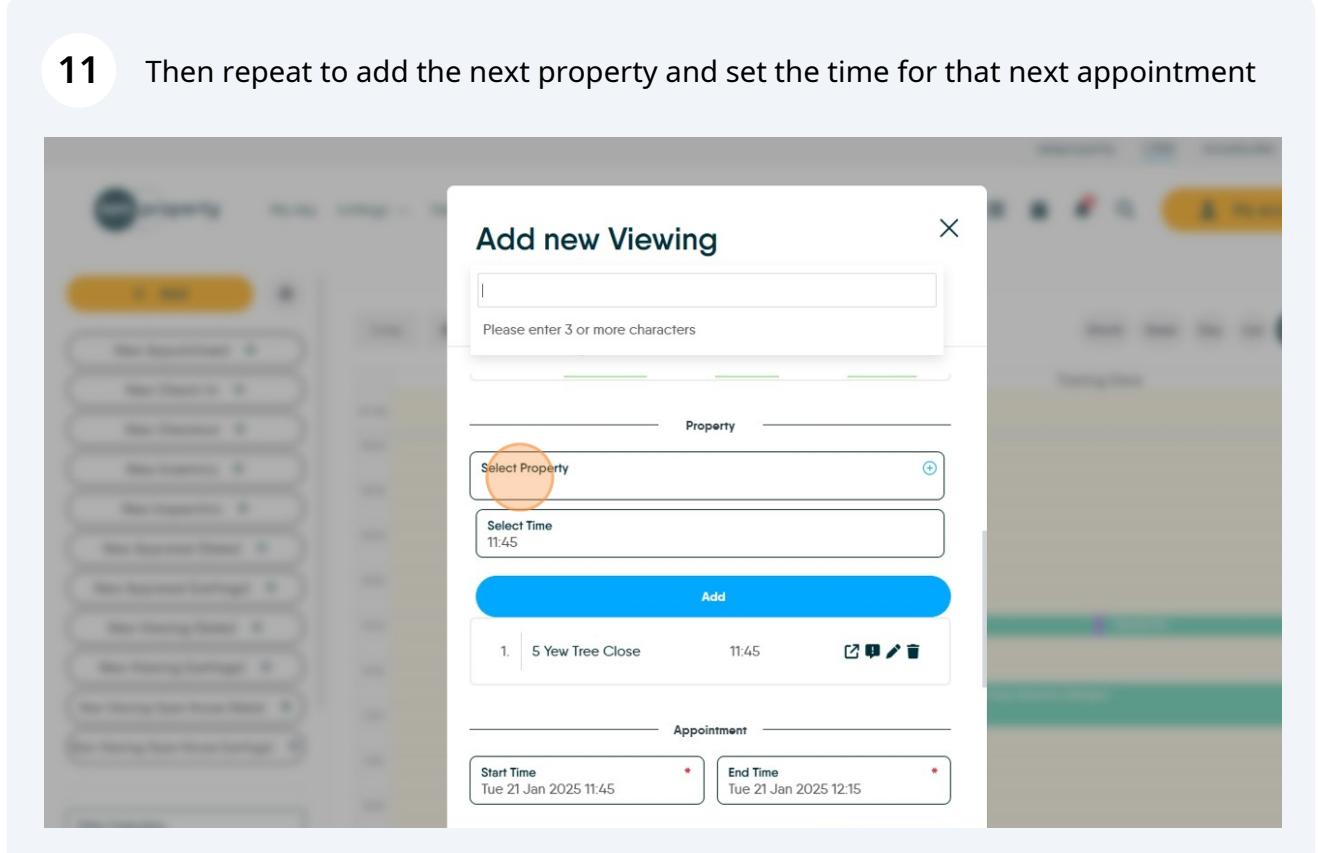
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Once the property is added click "Add"

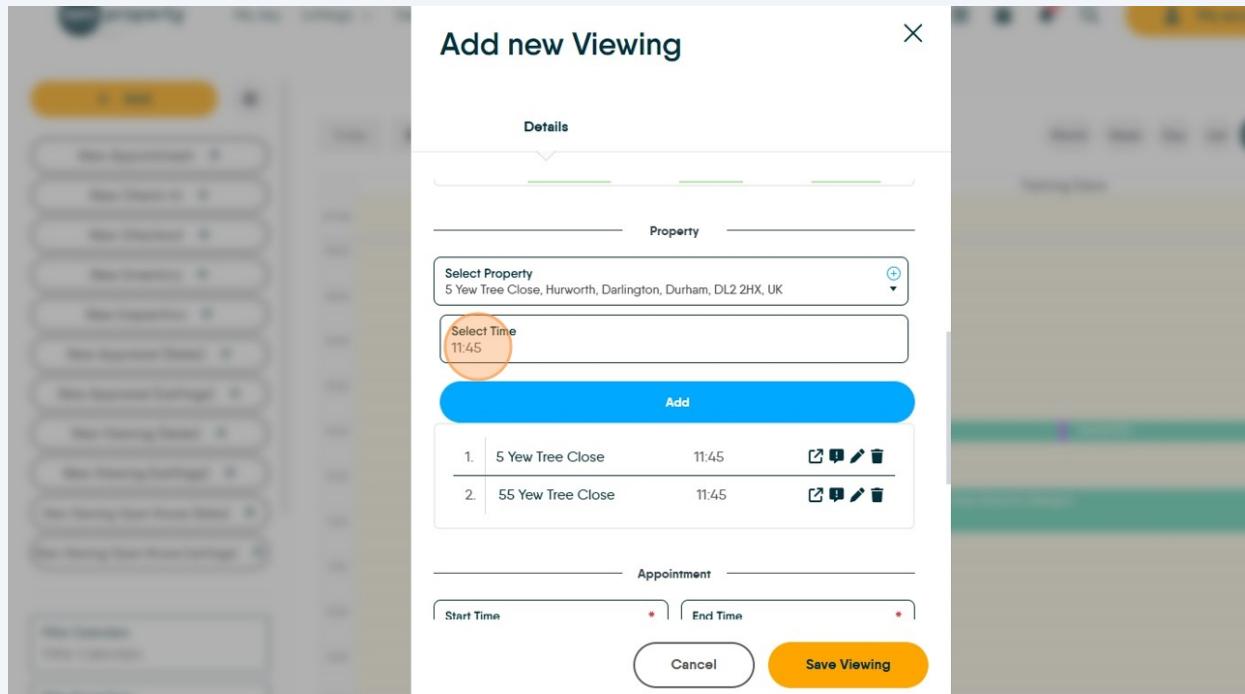




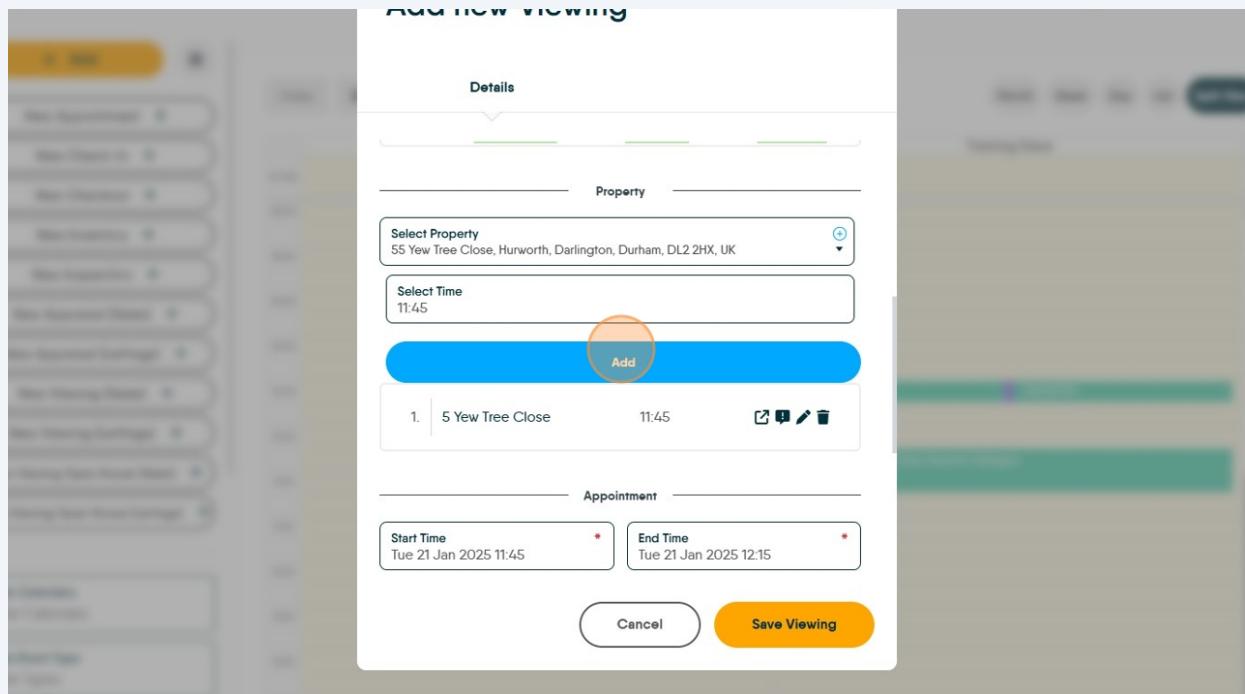
11 Then repeat to add the next property and set the time for that next appointment



12 Click the "Select Time" field.



13 Click "Add"

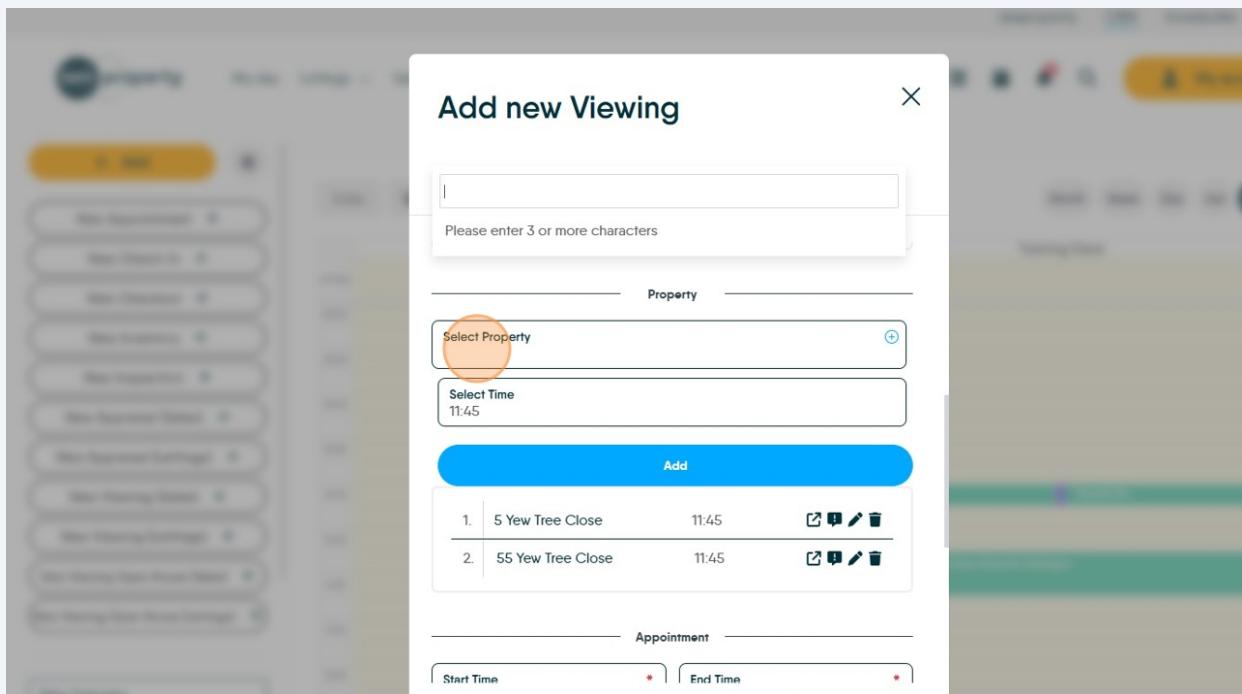




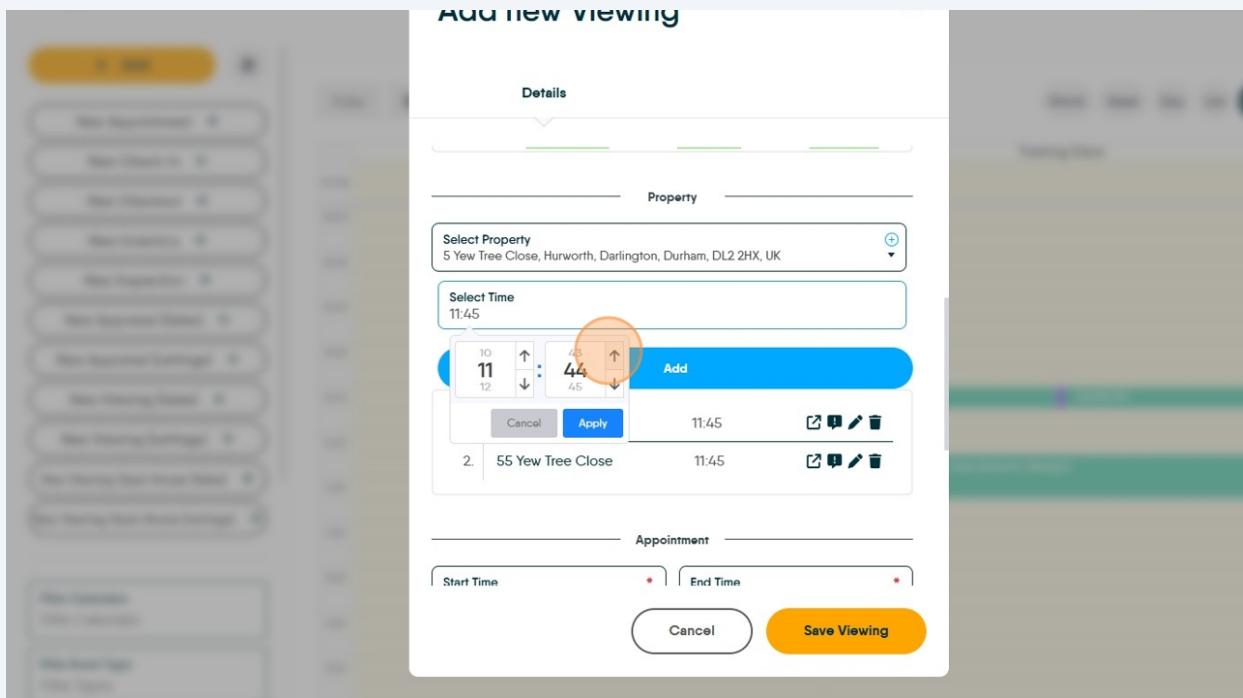
If you are booking multiple appointments for the same day, make sure you extend the end time of the appointment to the expected end time of the day, otherwise you will not be able to add appointments once the end time is reached. E.G. if the day is planned for 10:00 - 15:00 you will not be able to add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

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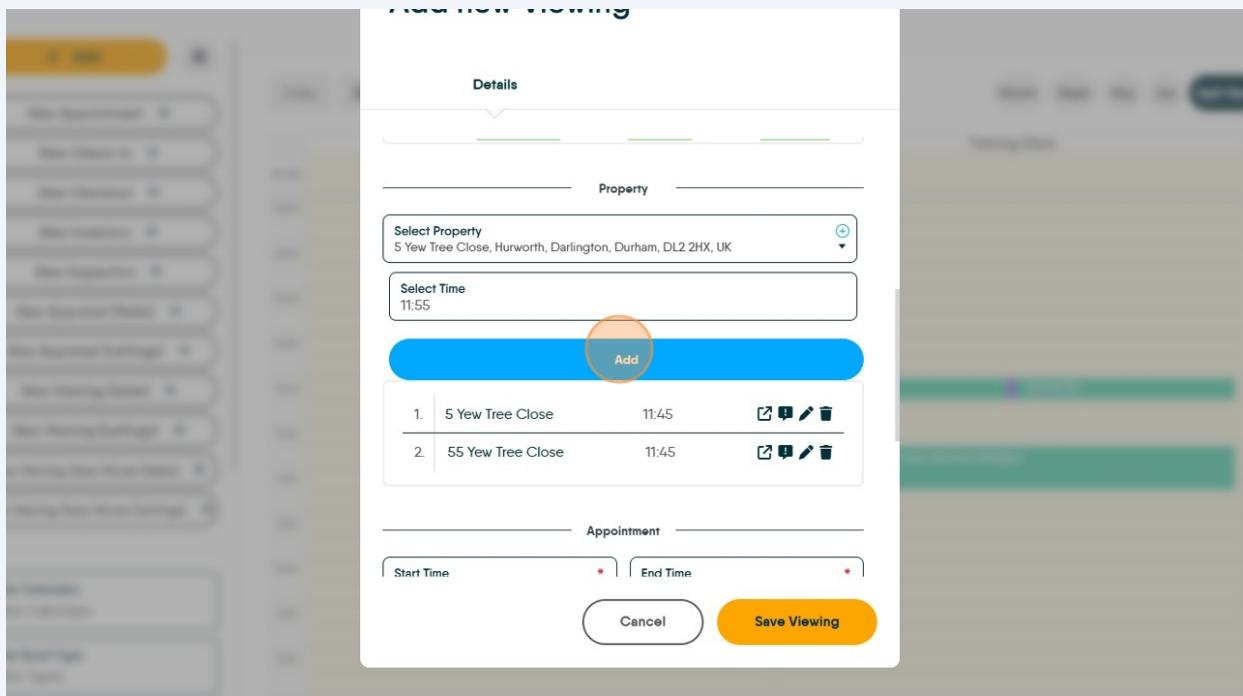
continue adding properties until completed. If you have added the incorrect timing or not allowed for travel, click on the 'pencil' icon to the right to edit the appointment.



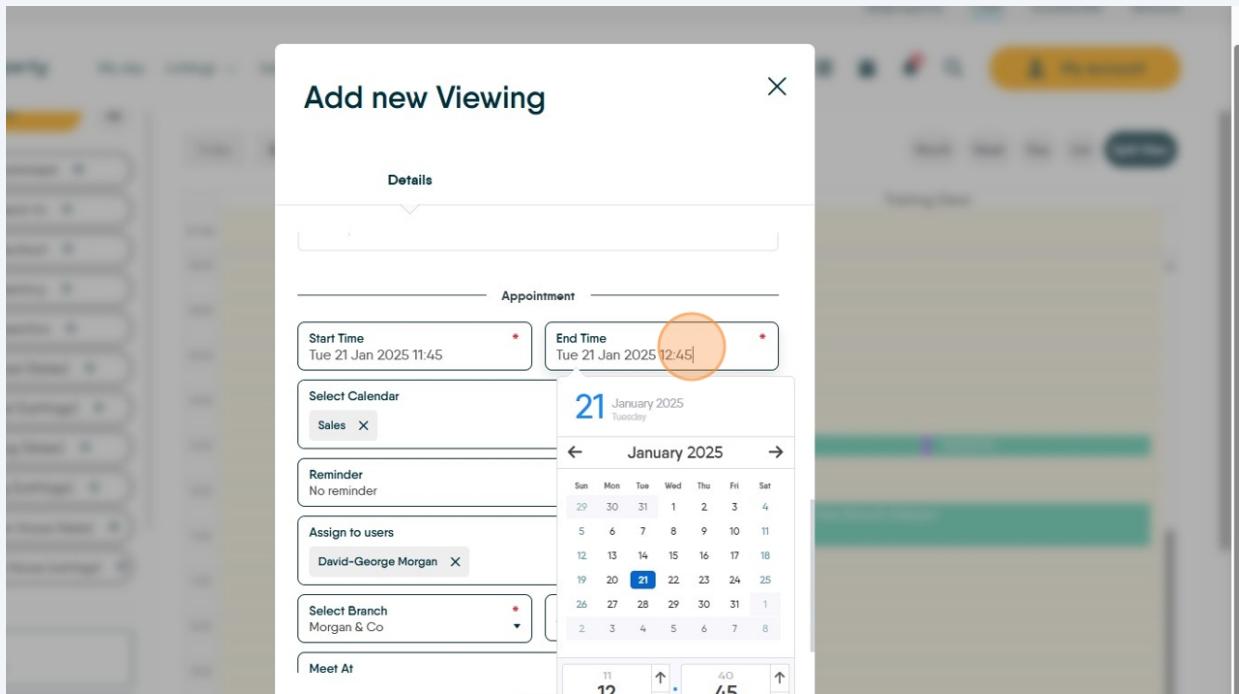
15 Click here to edit the time. Click Apply to set the time.



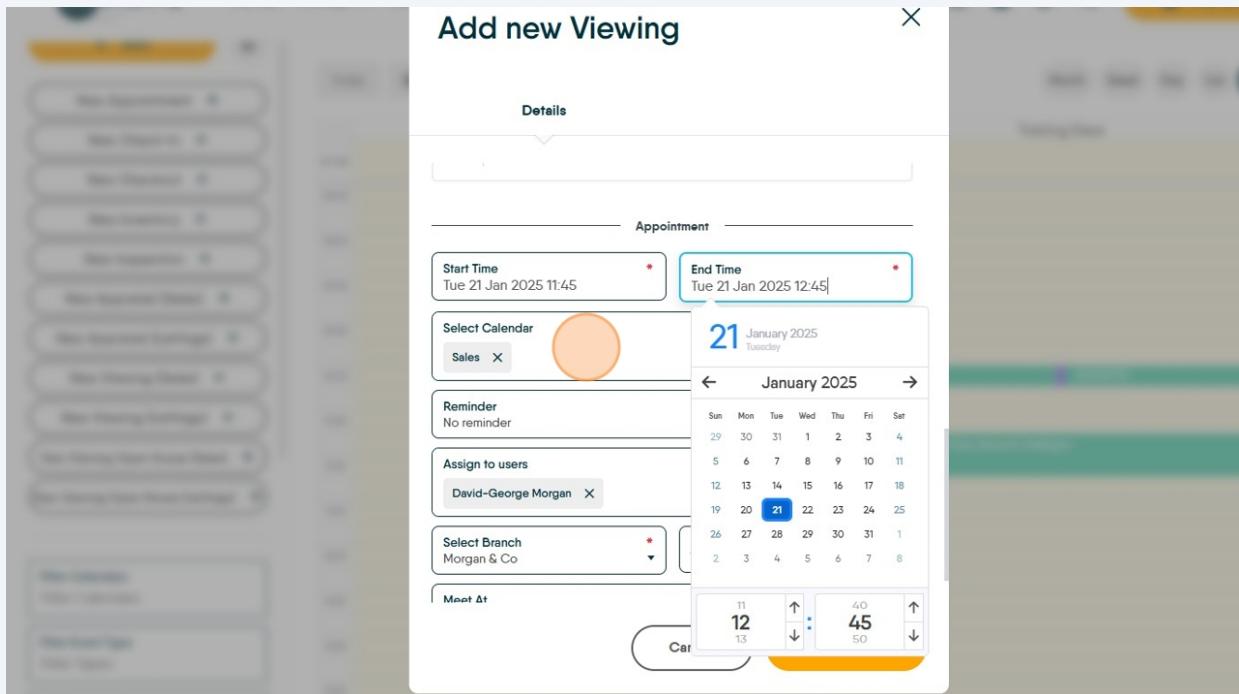
16 Click "Add"



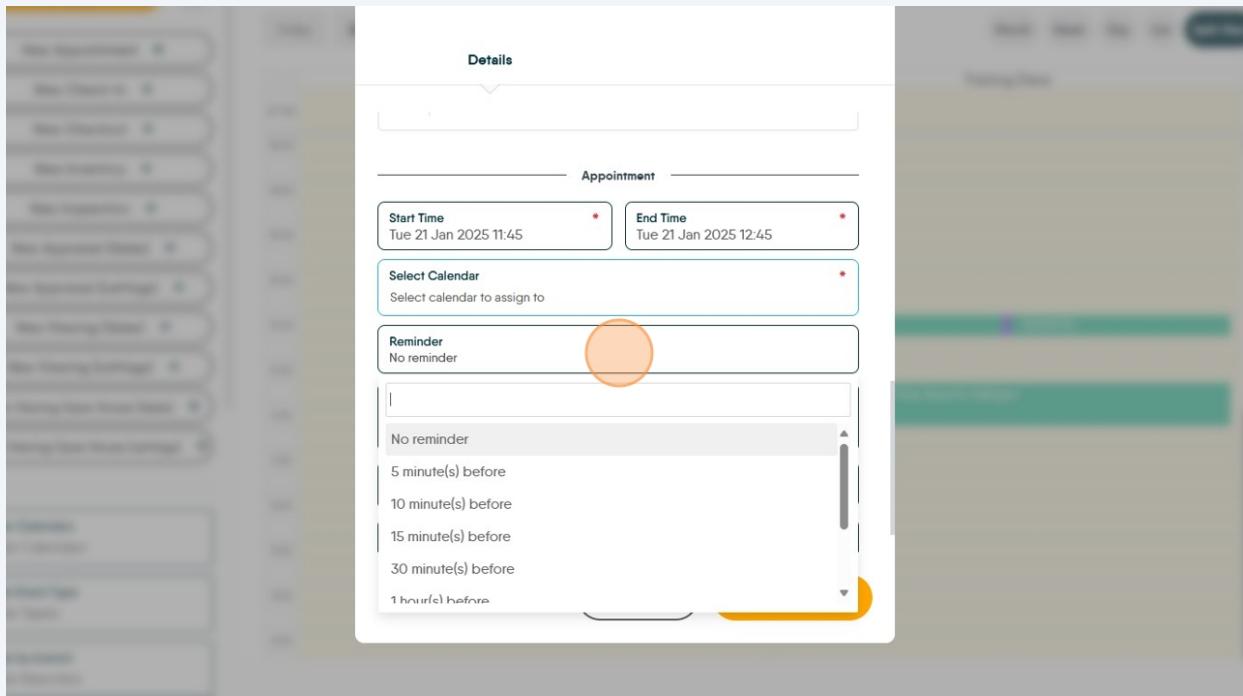
17 Click this text field to extend the appointment time if required.



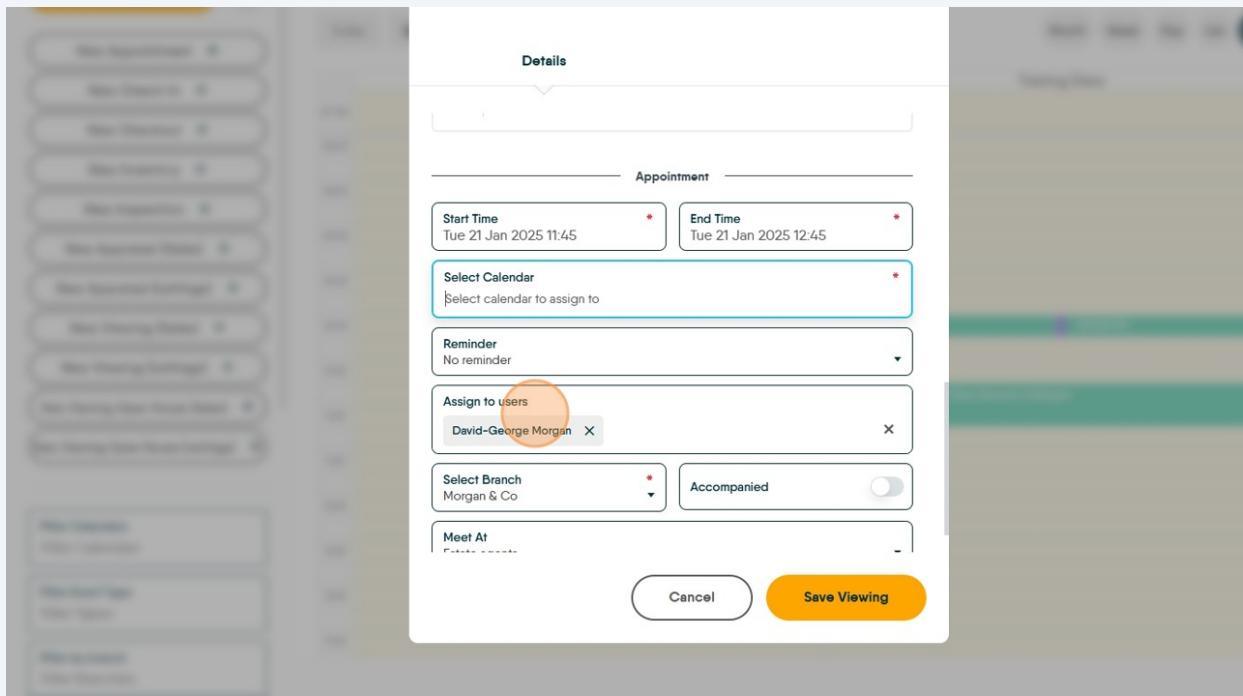
18 Once all the visits are set and timings corrected (if required) Click this search field and select the calendar you are adding the appointments to



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

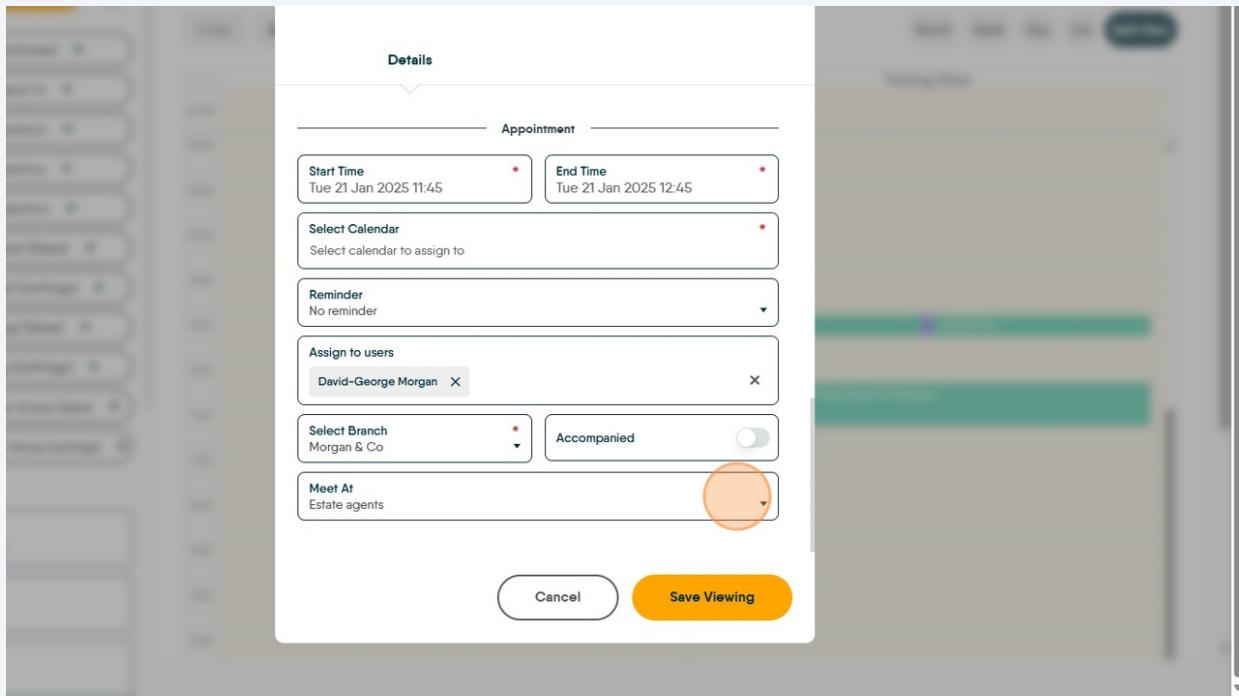


20 Click and select the users performing the viewing.



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"



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.

