

Scheduling a Viewing in CRM



This guide offers a step-by-step process for efficiently scheduling viewings in CRM, which is crucial for real estate professionals managing client appointments.

By following the instructions, users can streamline their workflow, ensure timely communication with clients, and enhance their overall productivity.

Viewing this guide can save time and reduce errors in the scheduling process, allowing agents to focus on closing deals.

- 1 Navigate to <https://crm.iamproperty.com/myday> then click on the Calendar icon

Different Ways to Create a Viewing Appointment

- 2 A viewing appointment can be made directly in the calendar and also be made from the Property or Applicant Record. The process to actually create the appointment is very similar in each way.

From the Property Record. Click here, or click "Viewings" then click "Add viewing"

The screenshot shows the iamproperty CRM interface. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right of the navigation bar are icons for 'Appraisal', 'WARNING', 'My account', and a search bar. The main content area displays a property record for '112 Yew Tree Close, Hurworth on Tees, Darlington, DL2 2HX | Offers In Excess Of £ 375,000 | 4 | 3'. Below the address, there is a status indicator 'Available' and a button 'Lead vendor: Mr Sales Vendor26' with a 'View Vendors' link. To the right of the vendor information is a 'Book Viewing' button, which is highlighted with a yellow circle. Below the vendor information are fields for 'Reference', 'Negotiator', 'Training Dev', 'Branch' (set to 'Morgan & Co'), and 'Status'. The 'Status' field has a dropdown arrow. At the bottom of the property record, there are sections for 'PROPERTY PICTURES' (with an 'Upload' button) and 'Content Approval' (with a green toggle switch and a message '✓ Vendor has approved this content'). There is also a 'Property Address' field with an 'Edit Address' button.

PROPERTY PICTURES Upload

Postcode: DL2 2HX

Address: 112 Yew Tree Close, Hurworth on Tees, Darlington, Durham, DL2 2HX

Price/Instructed Date Currency

Prefix: Offers In Excess Of

Price (GBP): £ 375,000

Instructed Date: 03/01/2025

Solicitor/Conveyancing

Solicitor Instructed: Instructed Date:

Solicitor: Burr and Co | 2 Duke Street, Darlin... Contact: Charles W Kingsfield Jr

Viewings

Details + Add Viewing

Sort Viewings

Date Range: 24/10/2024 - 24/02/2025

Search

Clear filters

Status

Upcoming, Old Viewings, Confirmed, Not Confirmed

My day Lettings Sales Accounts Reporting Communications

1 Viewings Found

03 Jan 2025 12:00 - 12:30

SA sales Applicant26 zagg.dave@gmail.com

★★★★★ Confirmed

Training Da...

Details + Add Viewing

Checklist

Appraisals

Compliance

Information

Stats

Marketing

Media

Rooms

Portals

3 Or from the Applicant record. Click "Viewings" then click "Add viewing"

Latest Offer: £375,000.00

Offer Status: Accepted

Applicant Status: ✓

Applicant Temp: H

Last Contacted

Personal Information

Title: sales Forename: sales Surname: Applicant26 Company Name:

Website: Phone Number: Work phone: Mobile phone:

Email Address: zagg.dave@gmail.com Salutation: Applicant26 Source: Advert Temperature: Hot

Applicant Address

Postcode: Enter postcode Address: ..., UK

Latest Offer: £375,000.00

Offer Status: Accepted

Applicant Status: ✓

Applicant Temp: H

Last Contacted

Viewings

+ Add Viewing

Sort Viewings

Date Range: 24/10/2024 - 24/02/2025

Search

Clear filters

Status

1 Viewings Found

03/01/2025 12:00 - 12:30

Feedback Received

£ 375,000 Offers In Excess Of

112 Yew Tree Close, Hurworth on Tees, Darlington, Durham, DL2...

Beds: 4 Baths: 3 Receptions: 2

Adding a Viewing from the Calendar

4 There are 3 ways you can access the Calendar to add a new Viewing.

- Click "View calendar"
- Click "Add new event"
- Click "Calendar"

Welcome back, Training

[+ Add New Record](#)[View Property Management](#)[Visit Help Centre](#)

Search all records

[Today's events](#)

No events

You have no events today

[+ Add New Event](#)[View Calendar](#)[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
Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

Welcome back, Training

[+ Add New Record](#)[View Property Management](#)[Visit Help Centre](#)

Search all records

[Today's events](#)

No events

You have no events today

[+ Add New Event](#)[View Calendar](#)[My tasks](#)

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
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Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025
Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

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

5 Then either click here on the 'new...' option on the left of the screen or.

21 January 2025

08:00	09:00	10:00	11:00	12:00	13:00
			Appraisal Slot	Appraisal Slot	
			Appraisal: 5 Yew Tree Close, Hurworth, Darlington		

6 Right-click here, ideally on the date and time you want the viewing created. Click "Sales" or click "Lettings" then click "Add Viewing"

The screenshot shows a calendar interface for Tuesday, January 21, 2025. The left sidebar contains buttons for creating various types of appointments. The main calendar grid shows two overlapping events: 'Appraisal Slot' from 10:00 to 11:00 and 'Appraisal: 5 Yew Tree Close, Hurworth, Darlington' from 11:00 to 12:30. A large orange circle highlights the 11:00 slot, indicating a conflict or a specific point of interest.

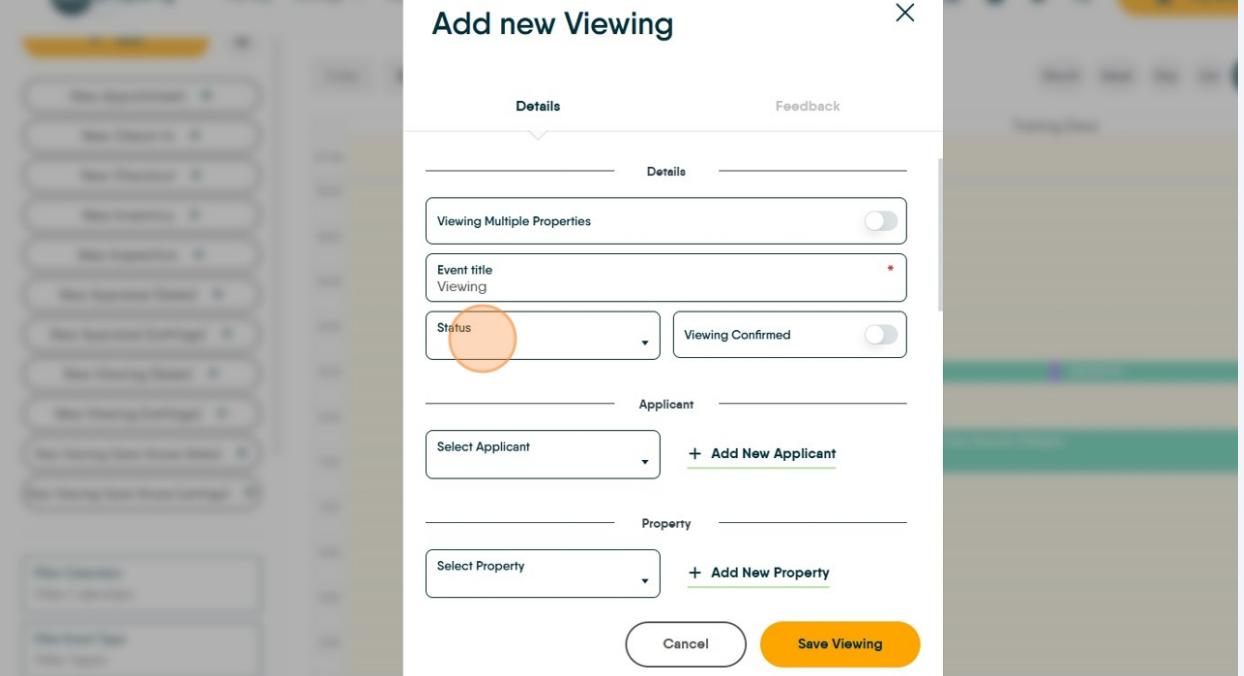
The screenshot shows the same calendar interface for Tuesday, January 21, 2025. The 'Add Appointment' dialog box is open at the 11:00 slot. The 'Lettings' button is highlighted with an orange circle. The appointment details '5 Yew Tree Close, Hurworth, Darlington' are visible in the background.

The image consists of two vertically stacked screenshots of a software application interface, likely a real estate management system. The top screenshot shows a calendar view for Tuesday, January 21, 2025. The calendar grid is divided into two sections: 'David-George Morgan' on the left and 'Training Dave' on the right. The 'Training Dave' section contains a teal-colored bar representing an 'Appraisal Slot' from 10:00 to 11:00. A context menu is open over this slot, with the 'Lettings' section expanded. The menu items listed are: Add Appointment, Add Check-In, Add Checkout, Add Inventory, Add Inspection, Add Viewing, Add Open House Viewing, Add Appraisal, and Close. The 'Sales' section is collapsed. The bottom screenshot shows the same calendar view for the same date. The context menu is open over the same teal 'Appraisal Slot' from 10:00 to 11:00. In this view, the 'Sales' section is expanded, showing the following menu items: Add Viewing, Add Open House Viewing, and Add Appraisal. The 'Lettings' section is collapsed. Both screenshots include a sidebar on the left with various appointment-related buttons and a header with navigation buttons for Today, Month, Week, Day, List, and Split View.

Creating the Viewing

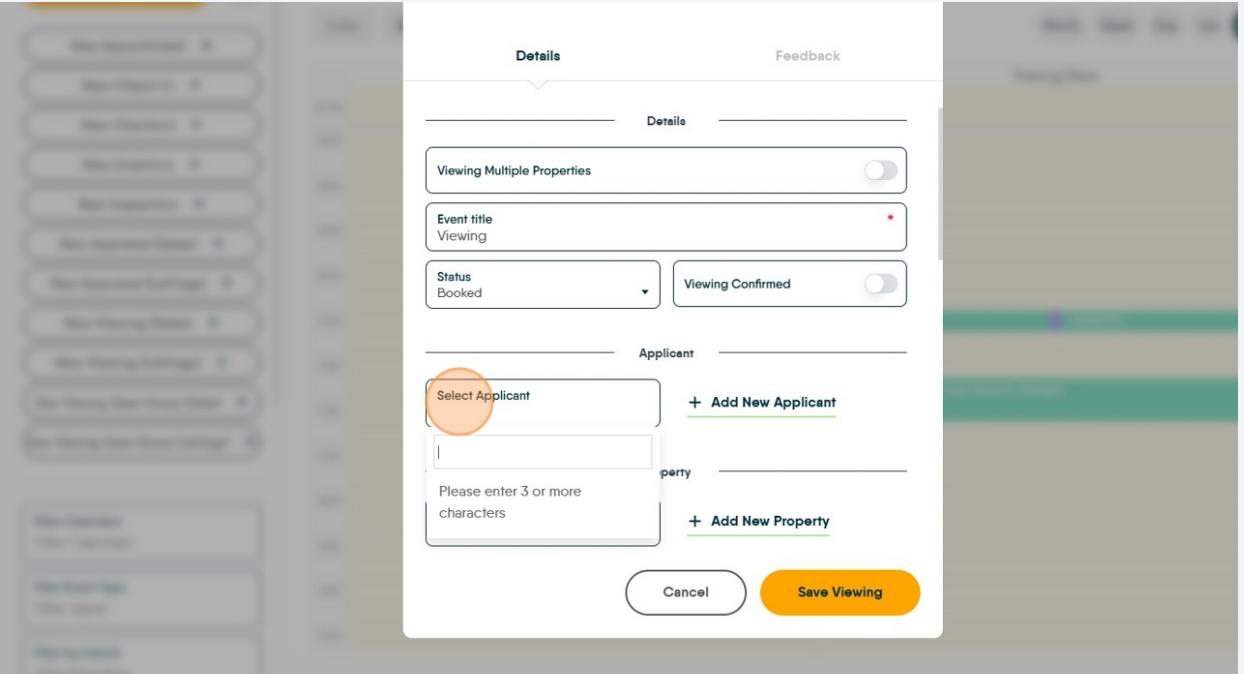
7 From here the process is the same for both Sales and Lettings.

Click here. Set the status of the appointment from the drop down menu.



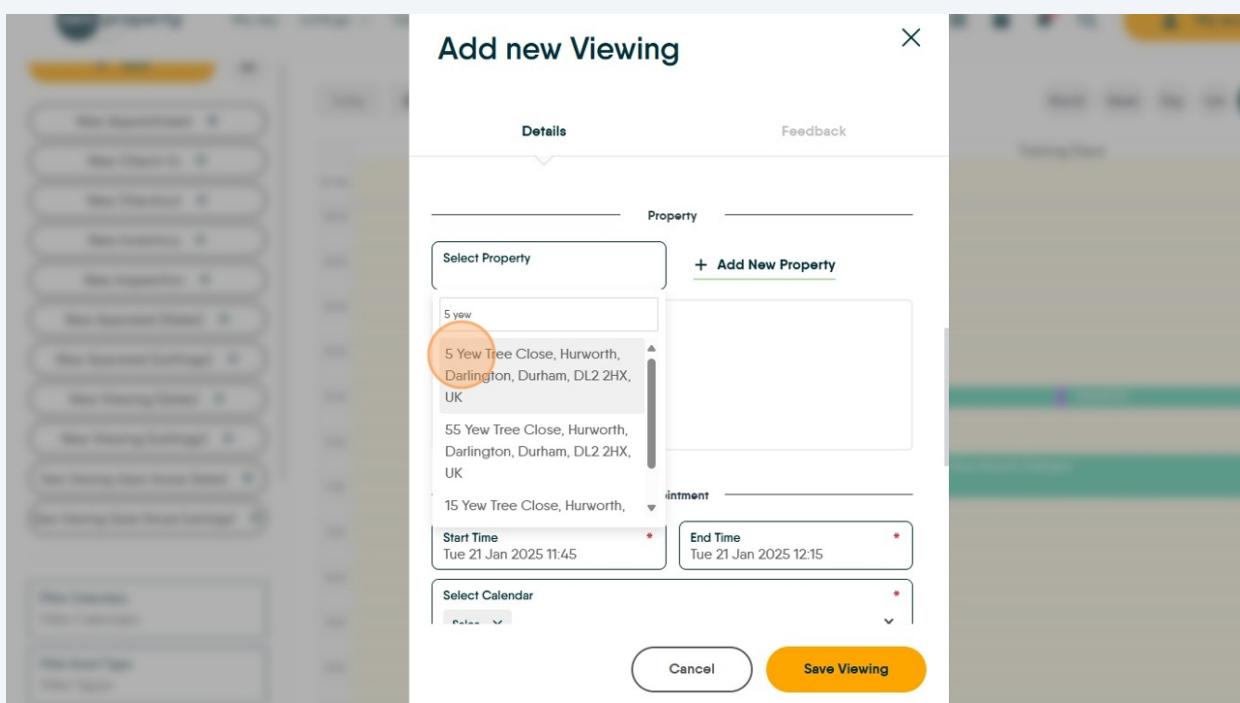
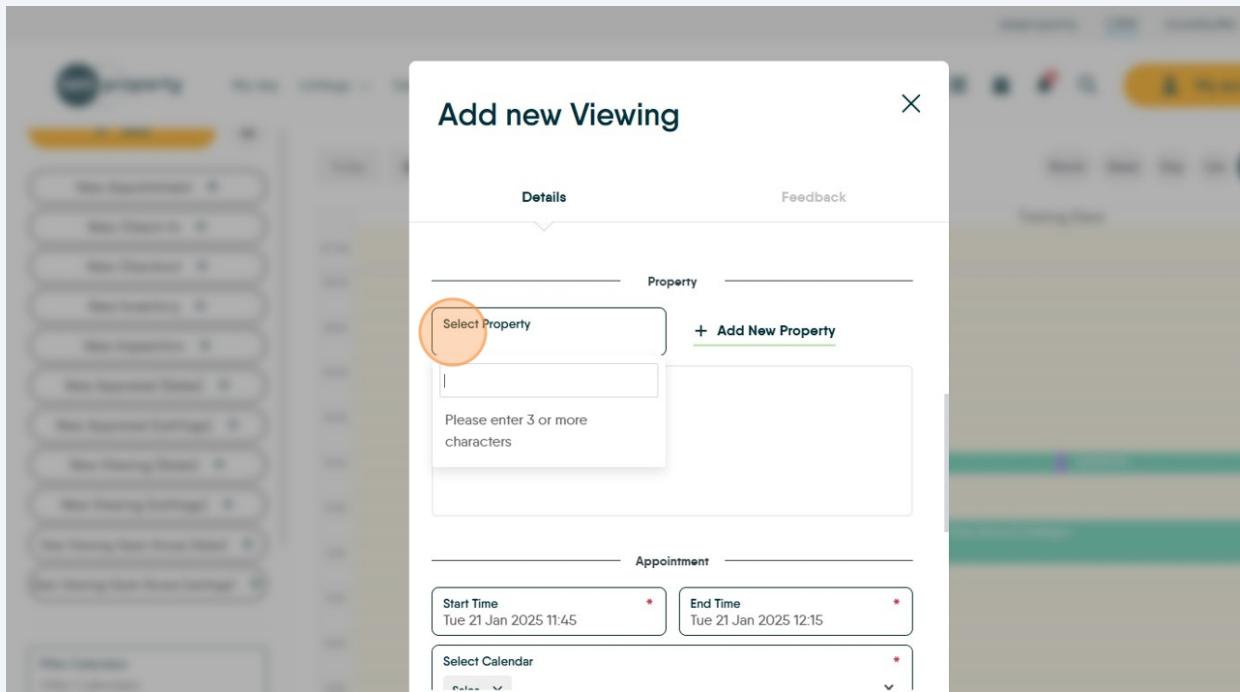
The screenshot shows the 'Add new Viewing' form. The 'Status' dropdown menu is highlighted with an orange circle. The dropdown menu shows 'Status' and 'Viewing Confirmed'.

8 Click here and search for the Applicant or '+ Add New Applicant' to add a new applicant to CRM.

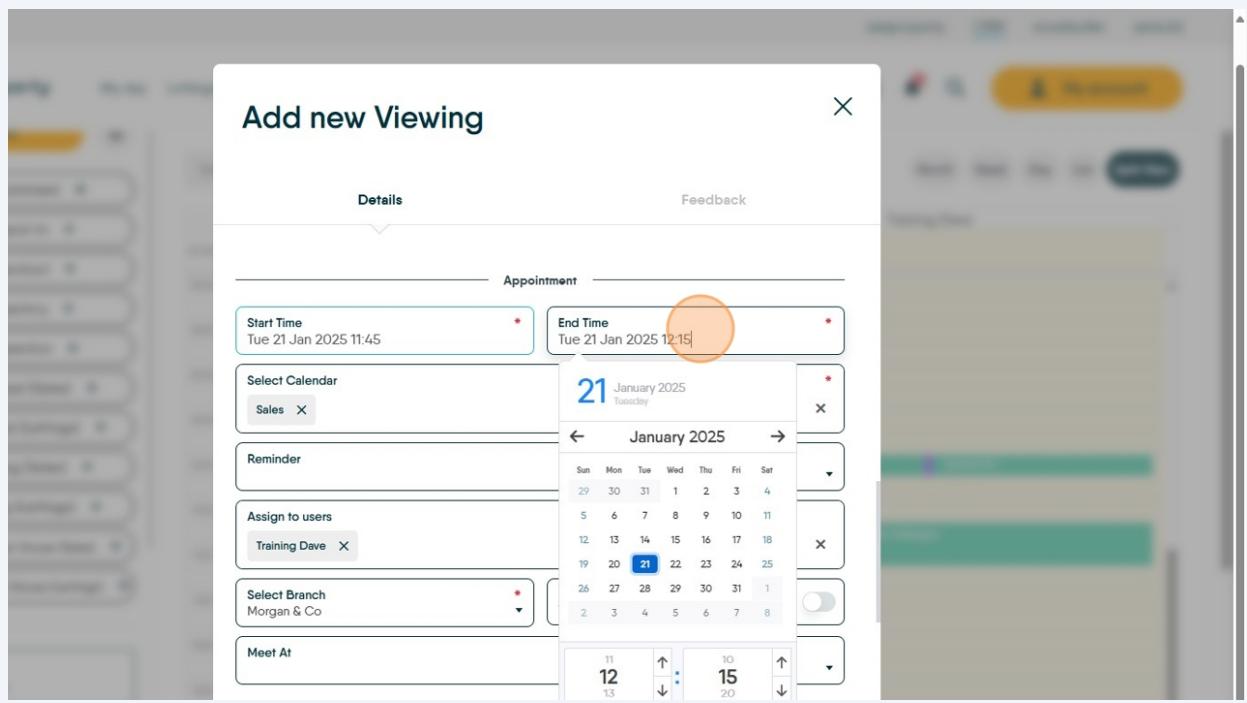
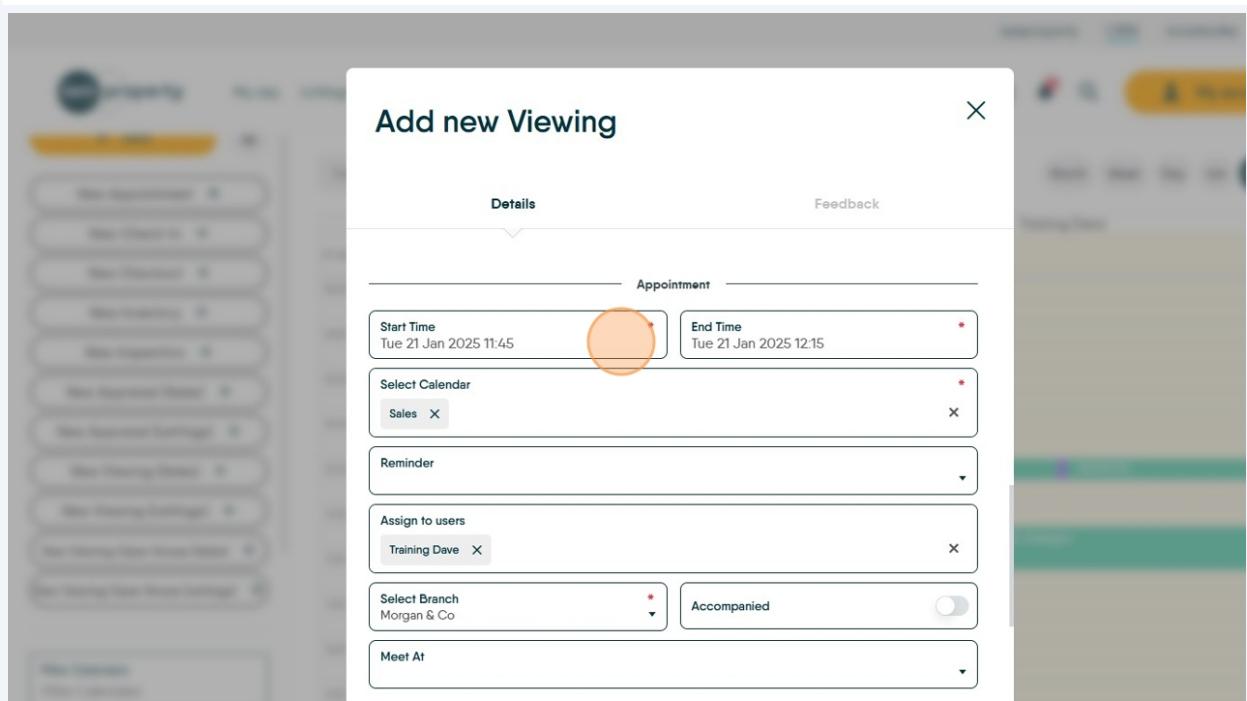


The screenshot shows the 'Add new Viewing' form. The 'Select Applicant' input field is highlighted with an orange circle. The input field contains a placeholder 'Please enter 3 or more characters'.

9 Click here to add the property the viewing is for or '+ Add New Property' to add a new property.

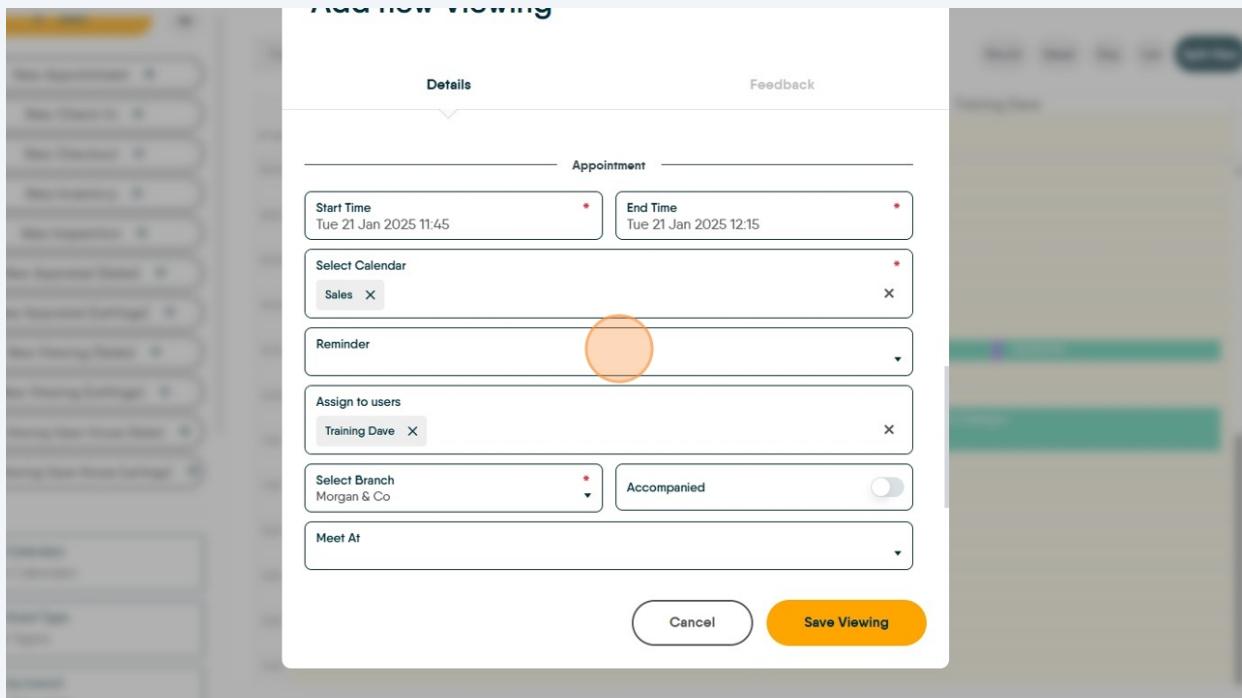


10 If you have used the option of 'right click' on the Calendar to create the appointment this will already be set based on where you clicked on the screen, otherwise set the date and time for the appointment.
Click this text field.



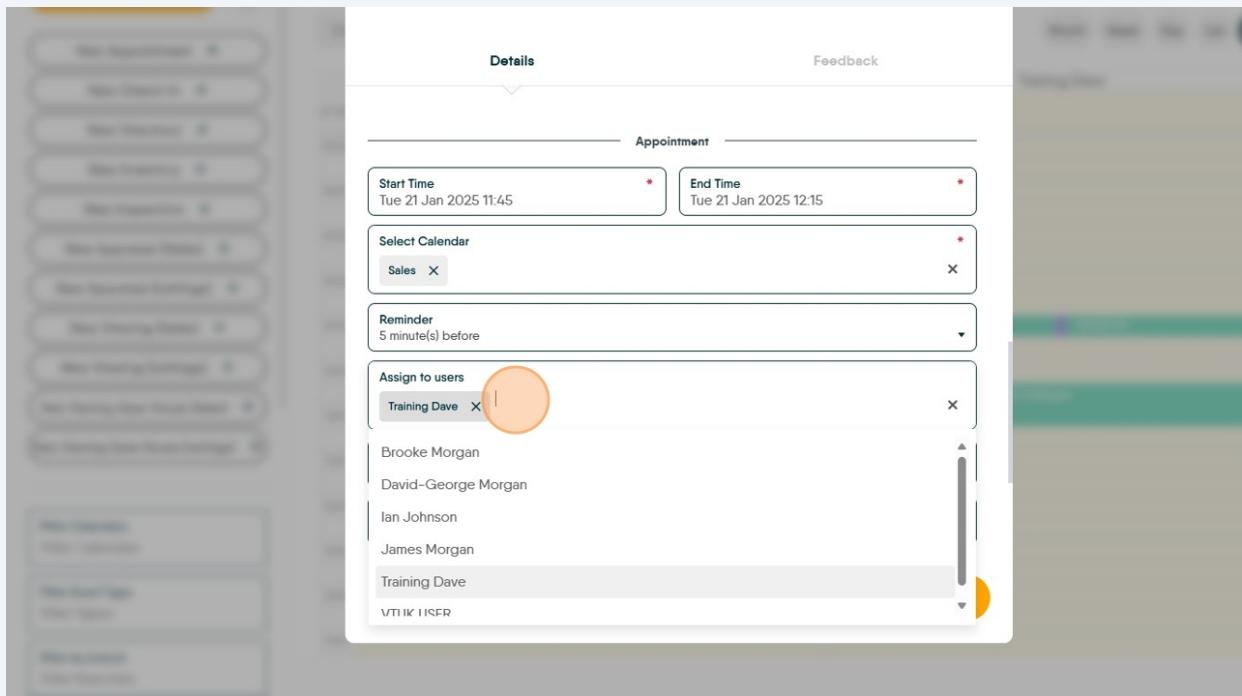
11

You may need to change the Calendar the appointment is being added to if so click into the 'Select Calendar' field. Click here to set a reminder

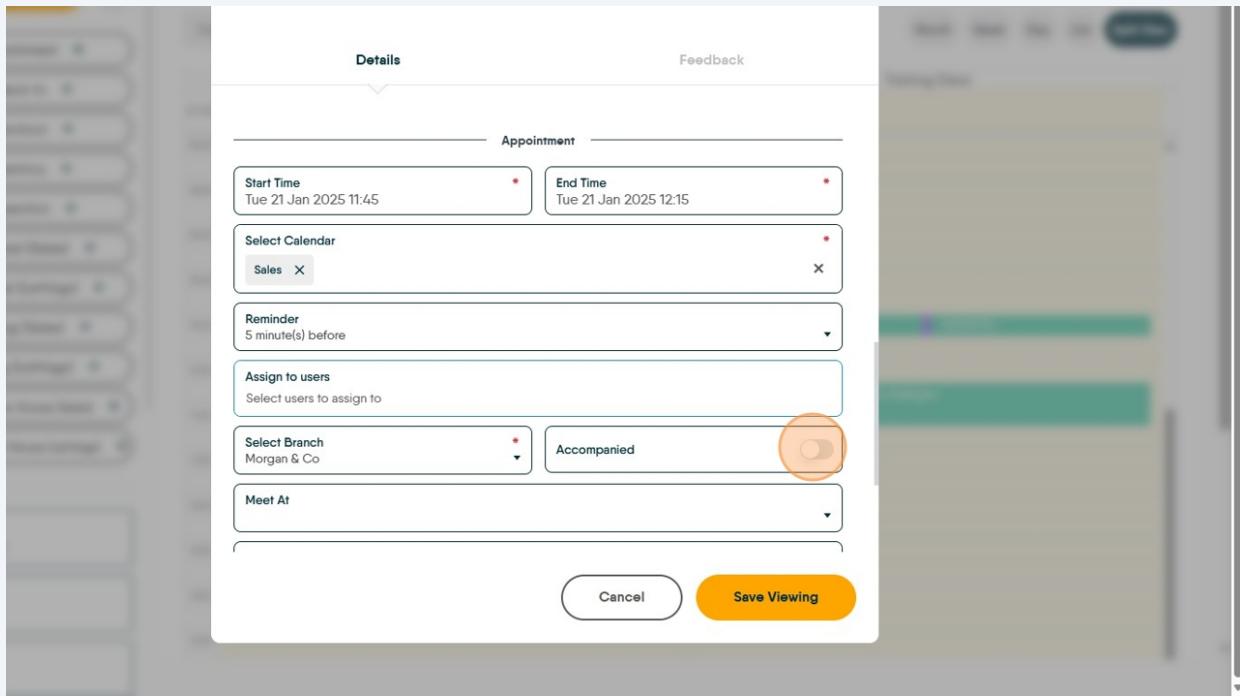


12

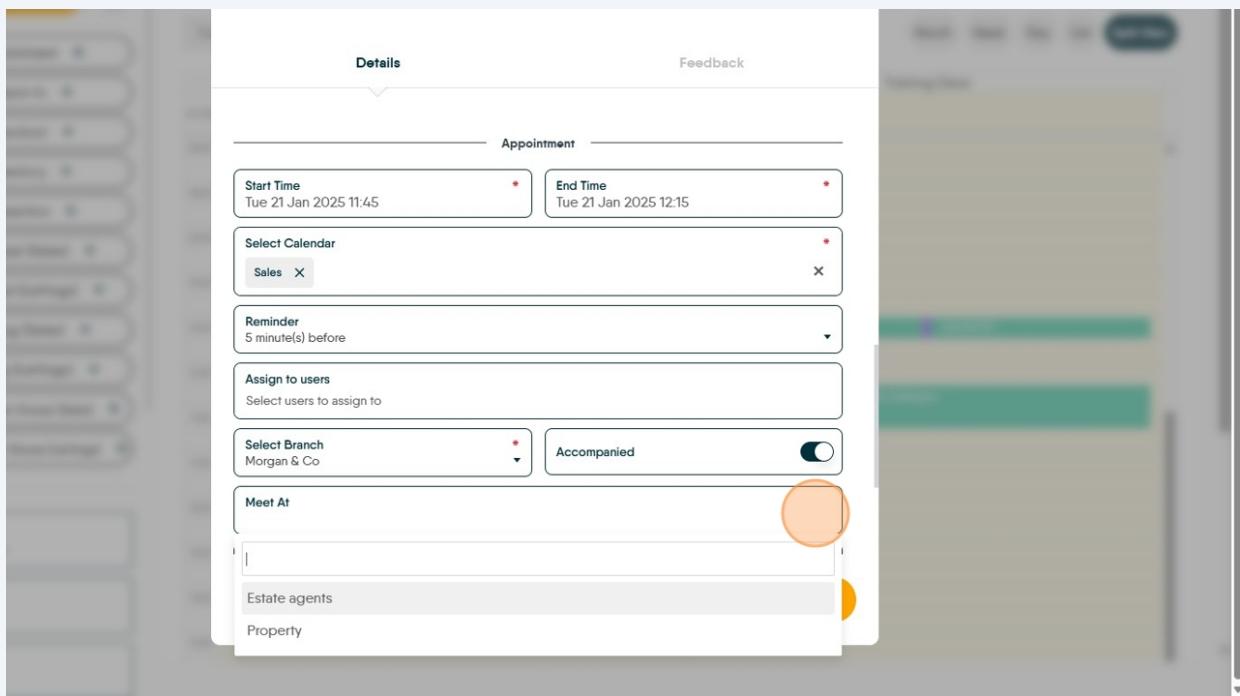
Click this search field to assign the viewing to a Negotiator.



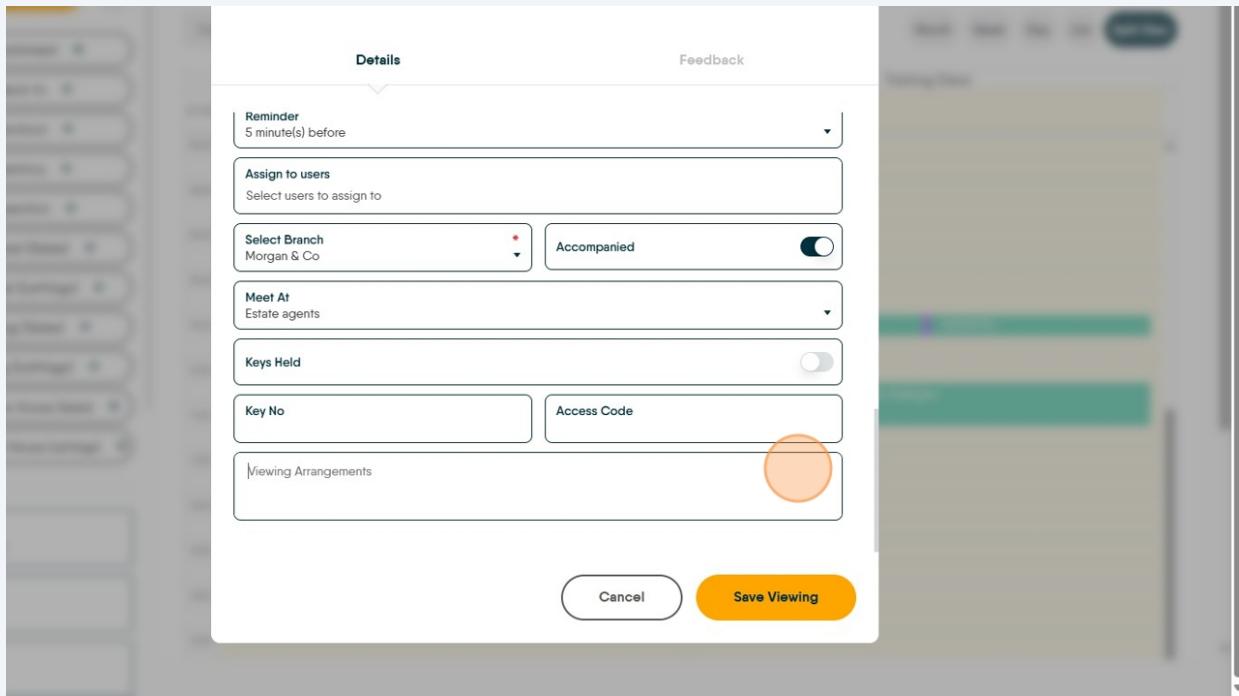
13 If the viewing is accompanied click here.



14 Set where you are meeting, click here.

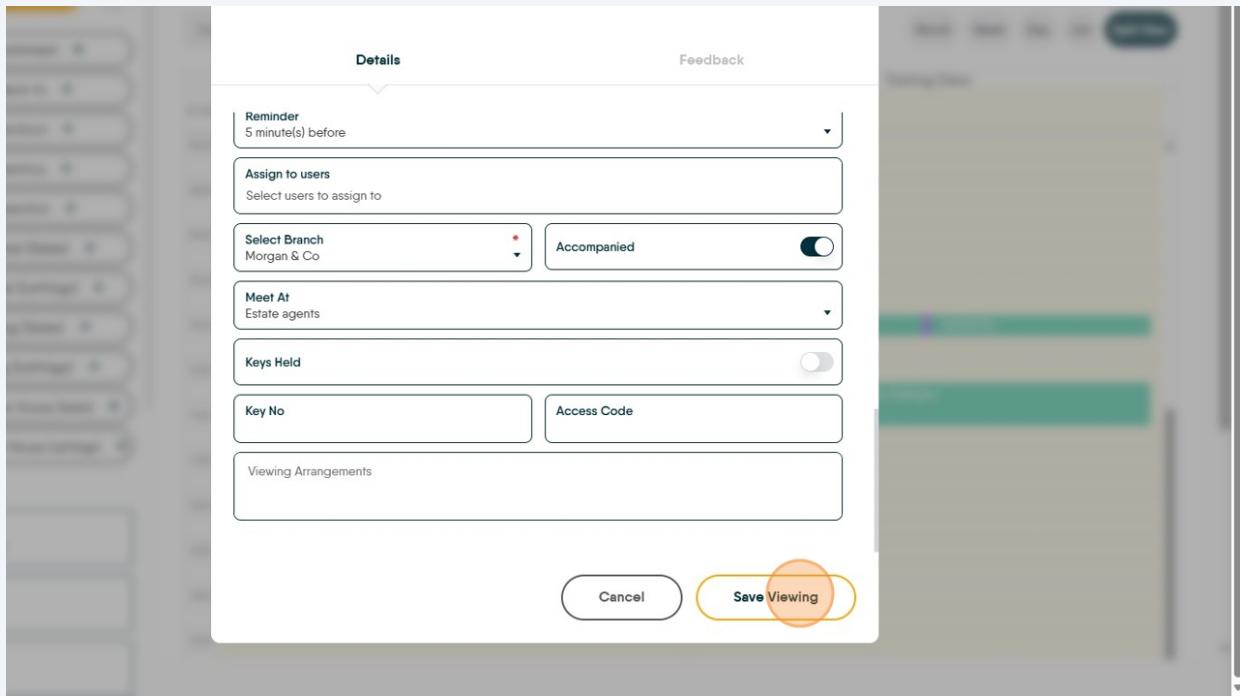


15 Click the "Viewing Arrangements" field to add any viewing arrangements.



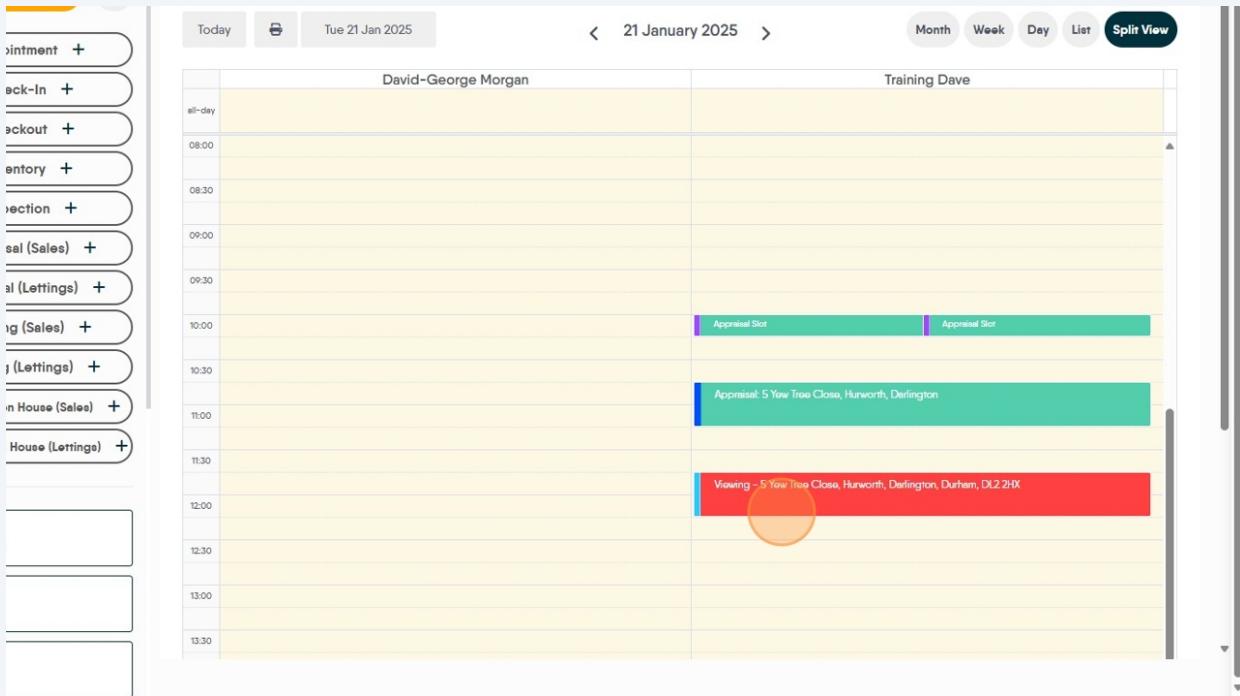
Tip! If there are any viewing arrangements added to the 'Viewing Arrangements' field in the Marketing screen of the property record, they will show in the Viewing Arrangements field of the appointment.

16 Click "Save Viewing"



17 The viewing will show on the Calendar. It will also show in the Applicant Record and the Property Record. If the appointment is not set as confirmed it will show in red (as here).

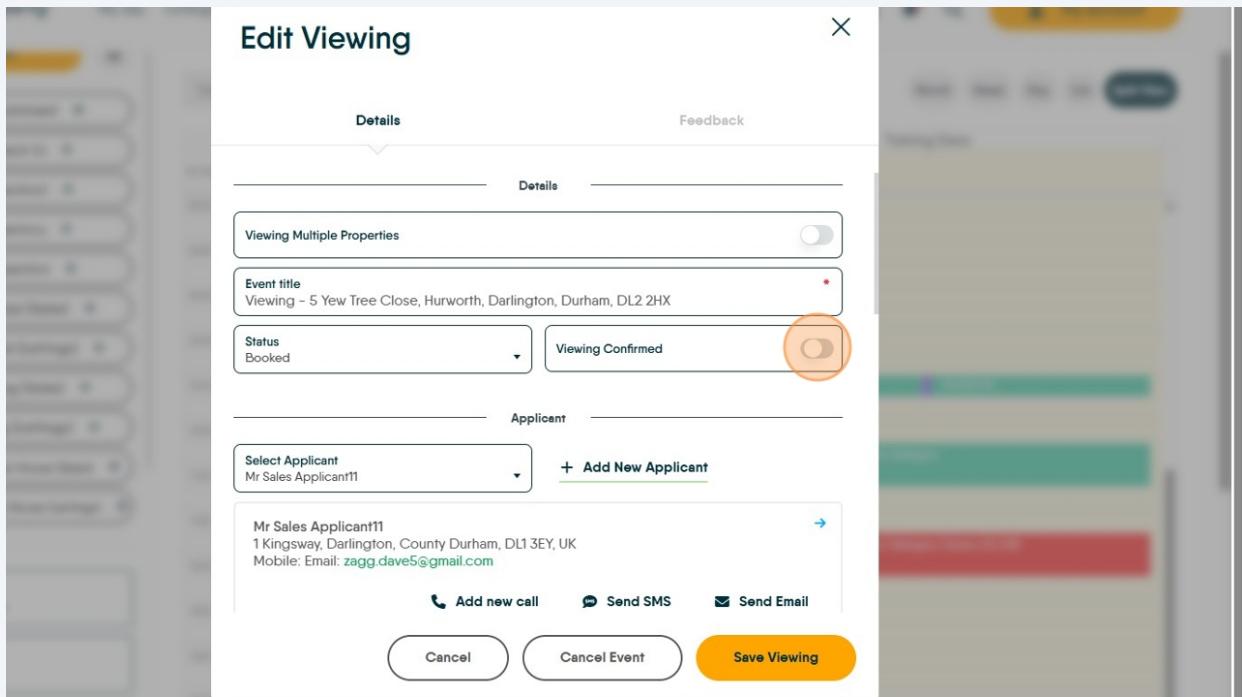
To confirm the appointment click here to open the record.



18

Opening the Viewing gives a few options. Click here to confirm the viewing, this can also be done from the Property Record and the Applicant record.

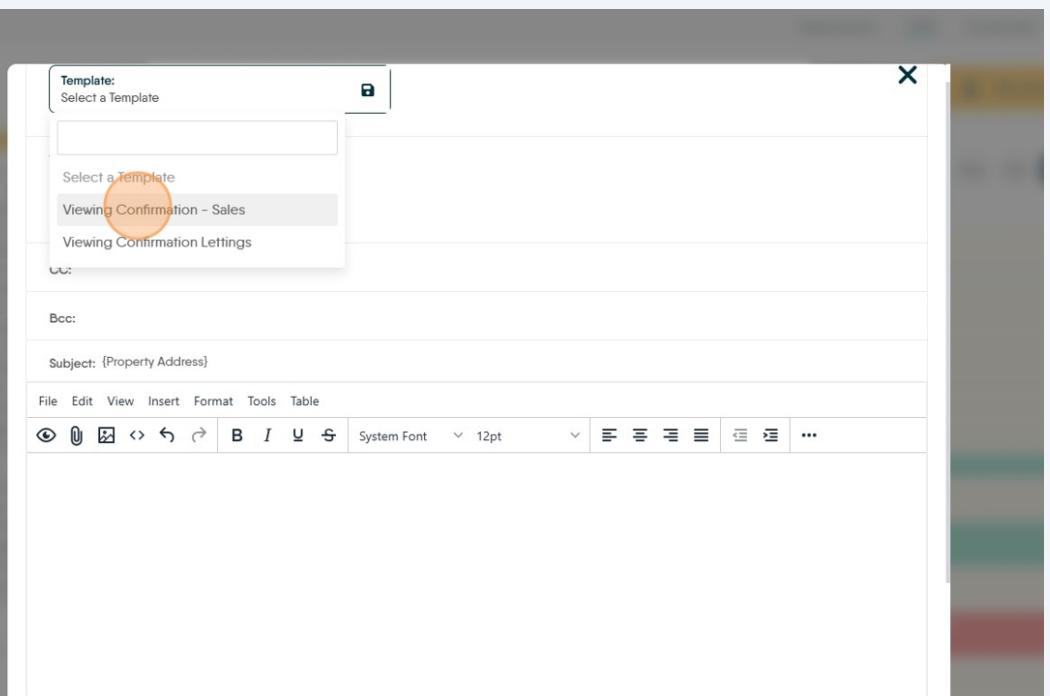
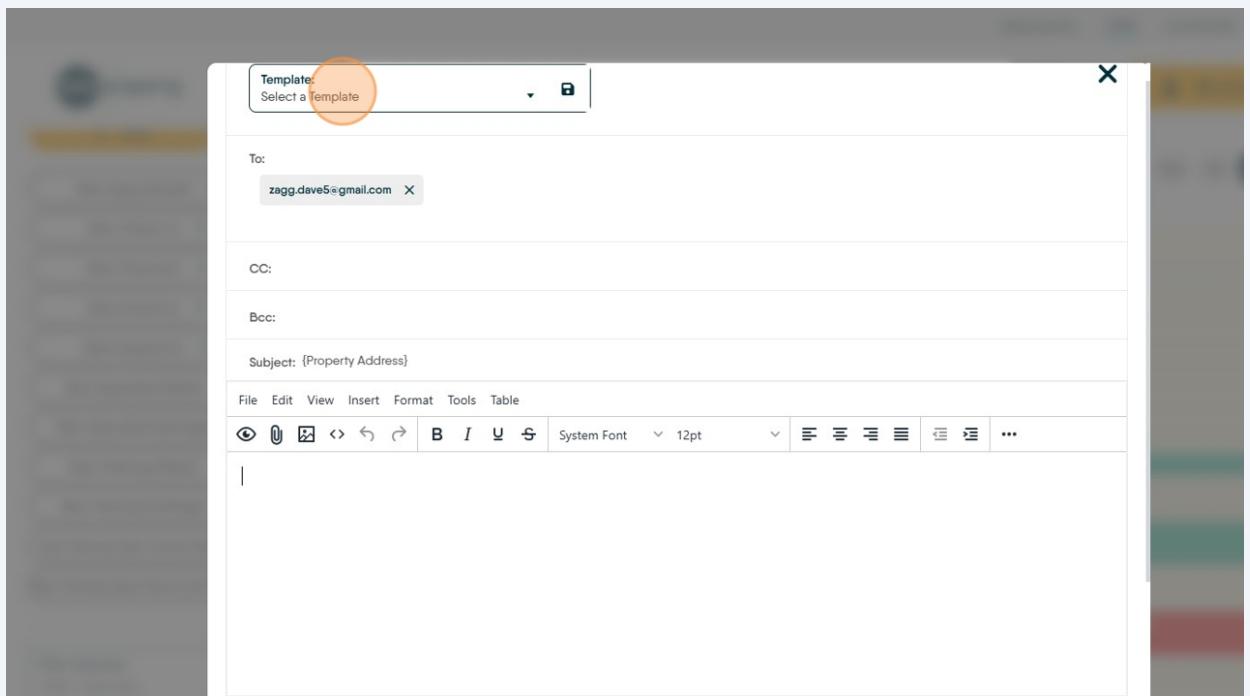
Click 'Save Viewing' to return to the Calendar screen.

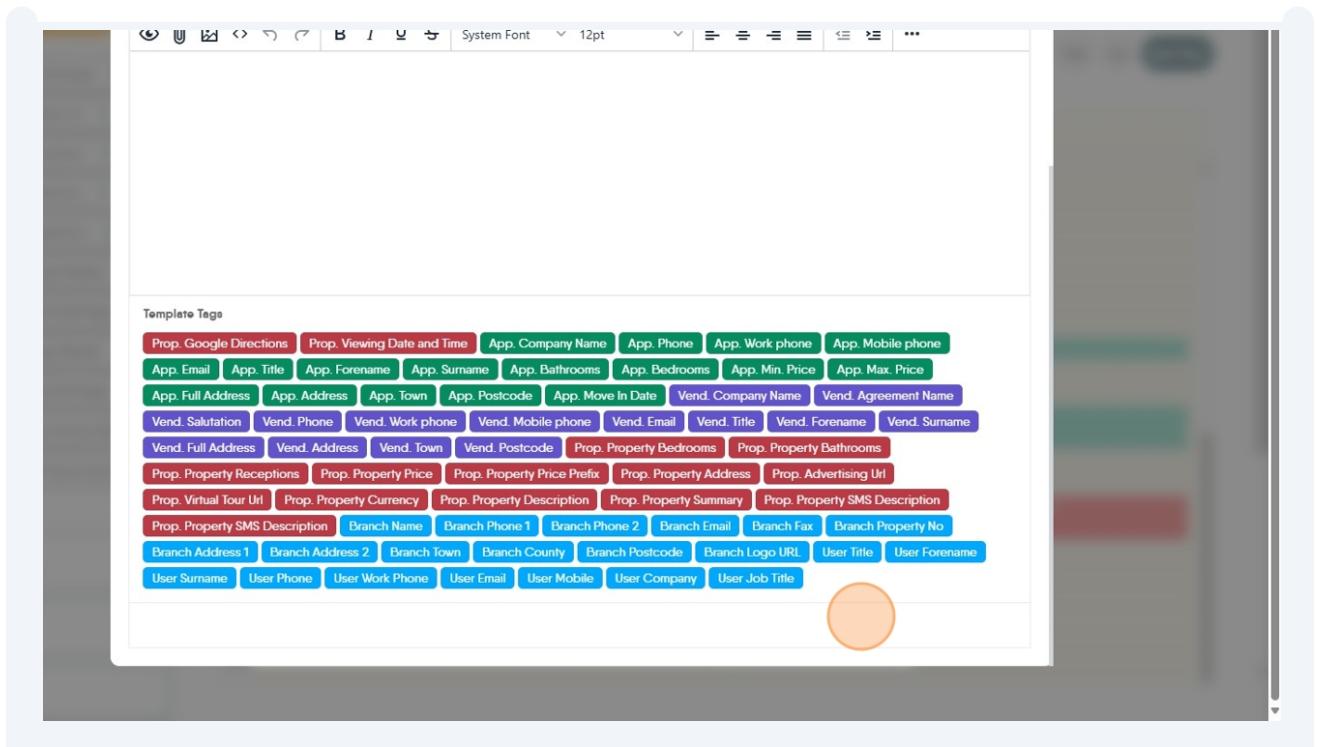


19

To send a confirmation email click "Send Email". There is the option to create a template here to quickly send a message to the applicants.

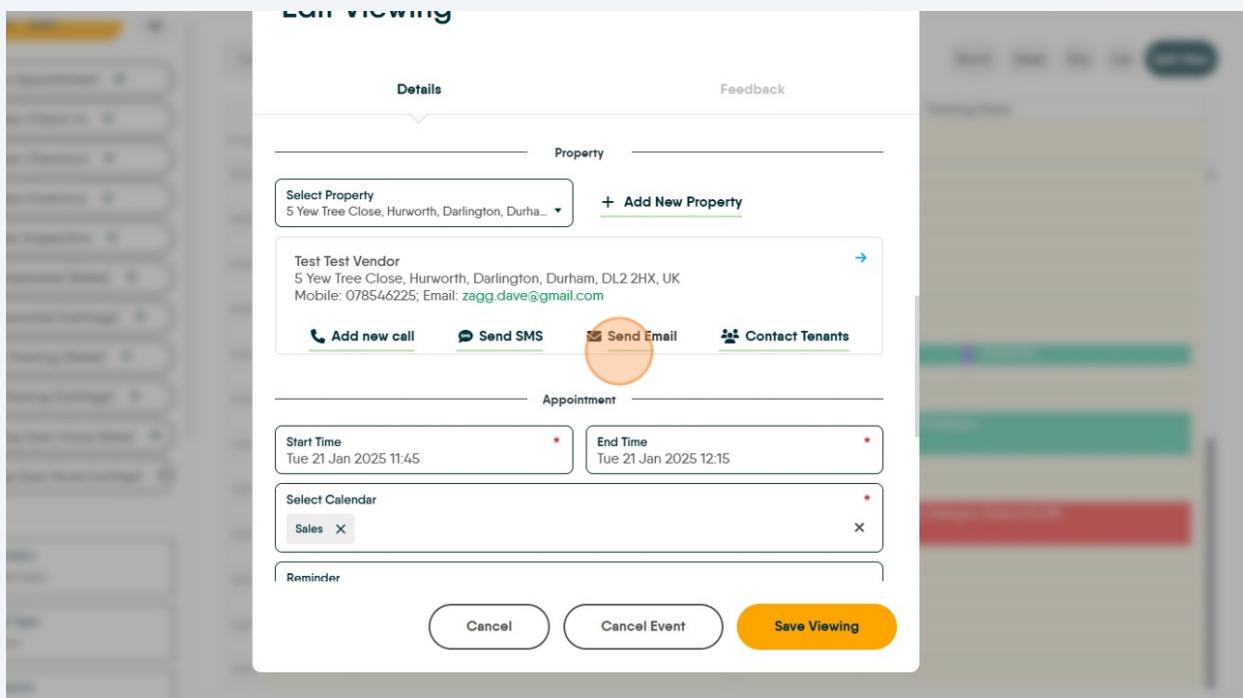
Click "Select a Template"
Click the template you want to select
Click "Send Email"

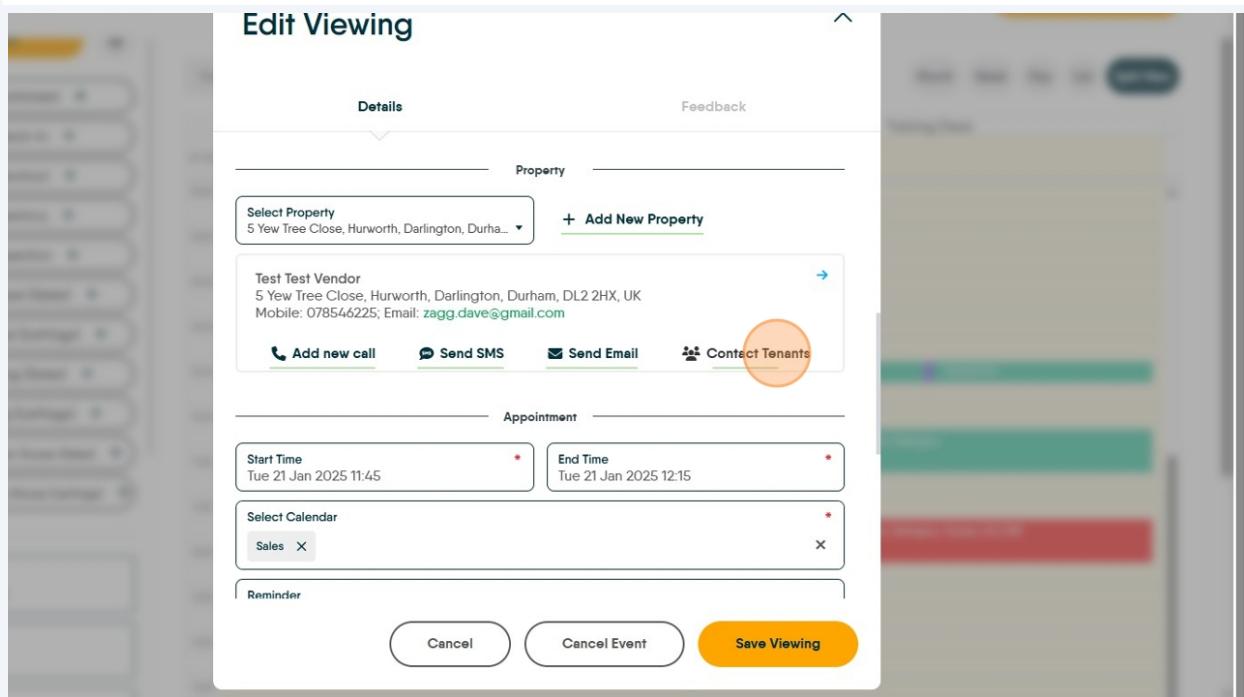




20

Click "Send Email" to email the Vendor or Landlord, if there are tenants in the property they can be contacted as well.





21

Click "Save Viewing" and the viewing will now be shown in the colour of the Negotiator allocated the viewing.

