

# Scheduling an Open House Viewing



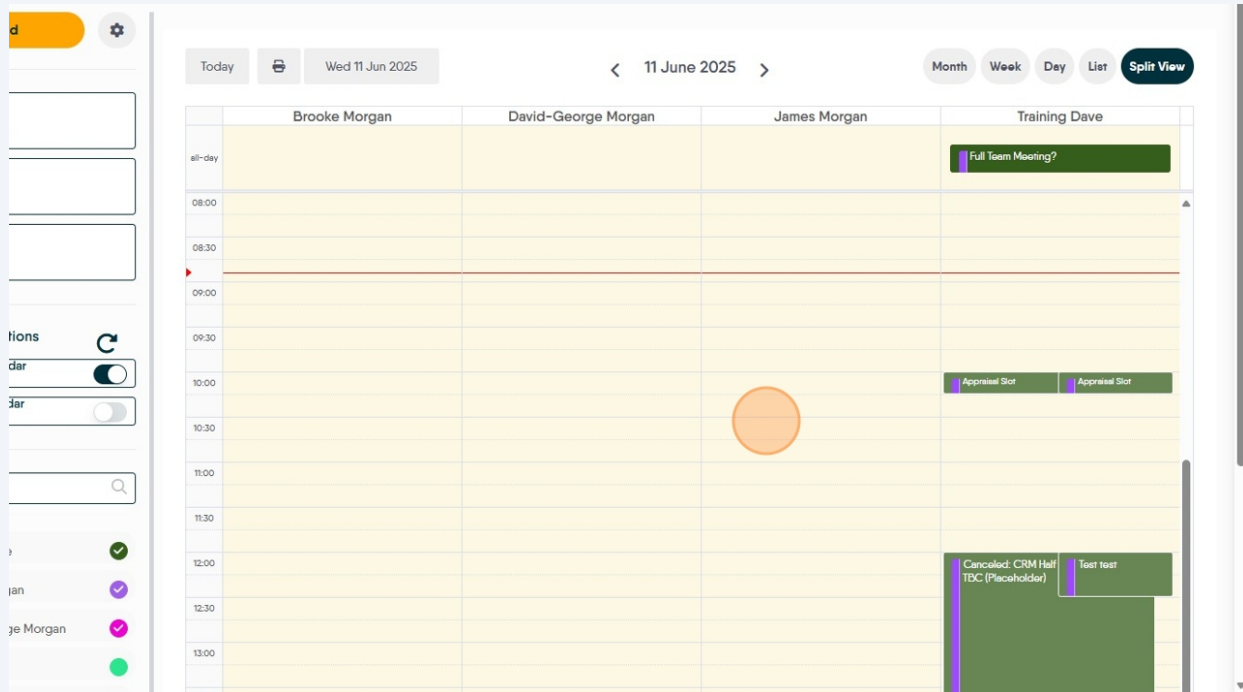
This guide offers a straightforward method for scheduling an open house viewing using the CRM platform, ensuring a seamless experience for both agents and clients. It provides step-by-step instructions that simplify the process, allowing users to efficiently set up viewings, manage appointments, and make necessary adjustments. By following this guide, real estate professionals can enhance their organisation and improve client engagement, ultimately leading to successful property sales.

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

The screenshot displays the 'iam property' CRM calendar interface. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', along with a search icon and a 'My account' button. The left sidebar contains a '+ Add' button and several filter sections: 'Calendars' (with a dropdown), 'Event Type' (with a dropdown), 'by branch' (with a dropdown), and 'Integrations' (with toggle switches for 'Outlook Calendar' and 'Google Calendar'). Below these is a search bar for 'Users'. The main calendar area shows a weekly view for 'Wed 11 Jun 2025'. The calendar grid is organized by user: Brooke Morgan, David-George Morgan, James Morgan, and Training Dave. The time slots range from 08:00 to 12:30. Several events are visible: 'Full Team Meeting?' (green bar), 'Appraisal Slot' (purple bar), and 'Cancelled: CRM Half TBC (Placeholder)' (green bar). A 'Test test' event is also visible.

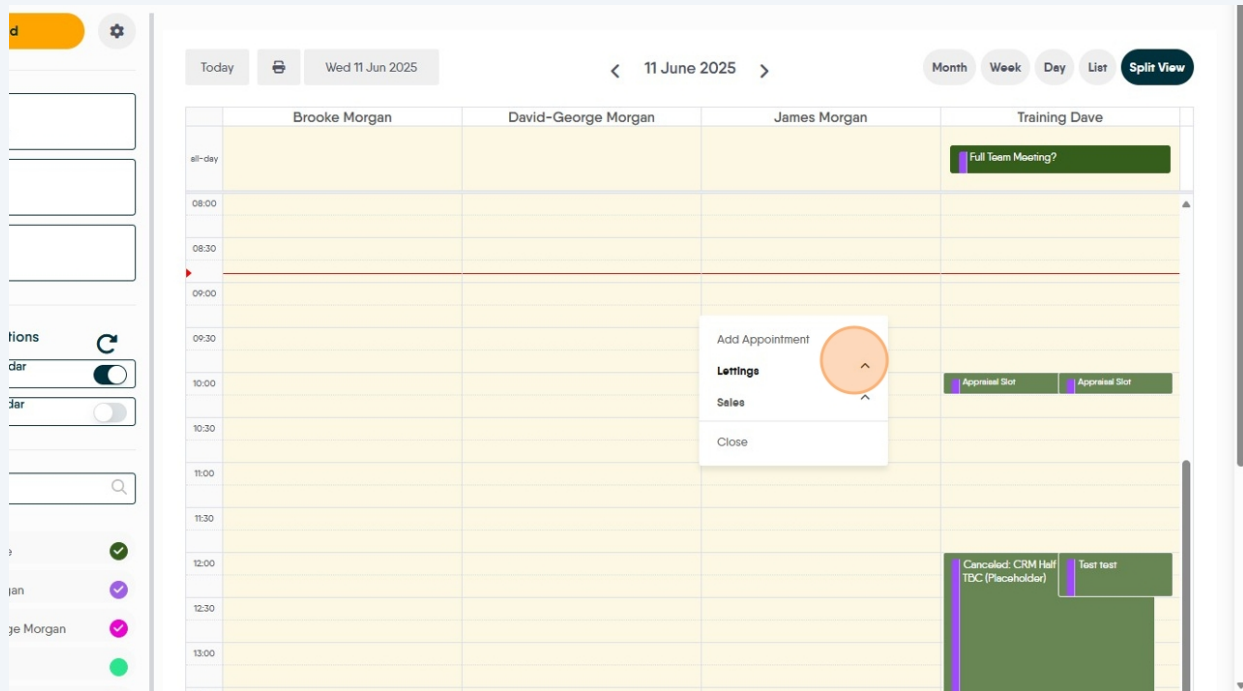
2

In the CRM calendar right-click on the time and date you want to set the appointment for.

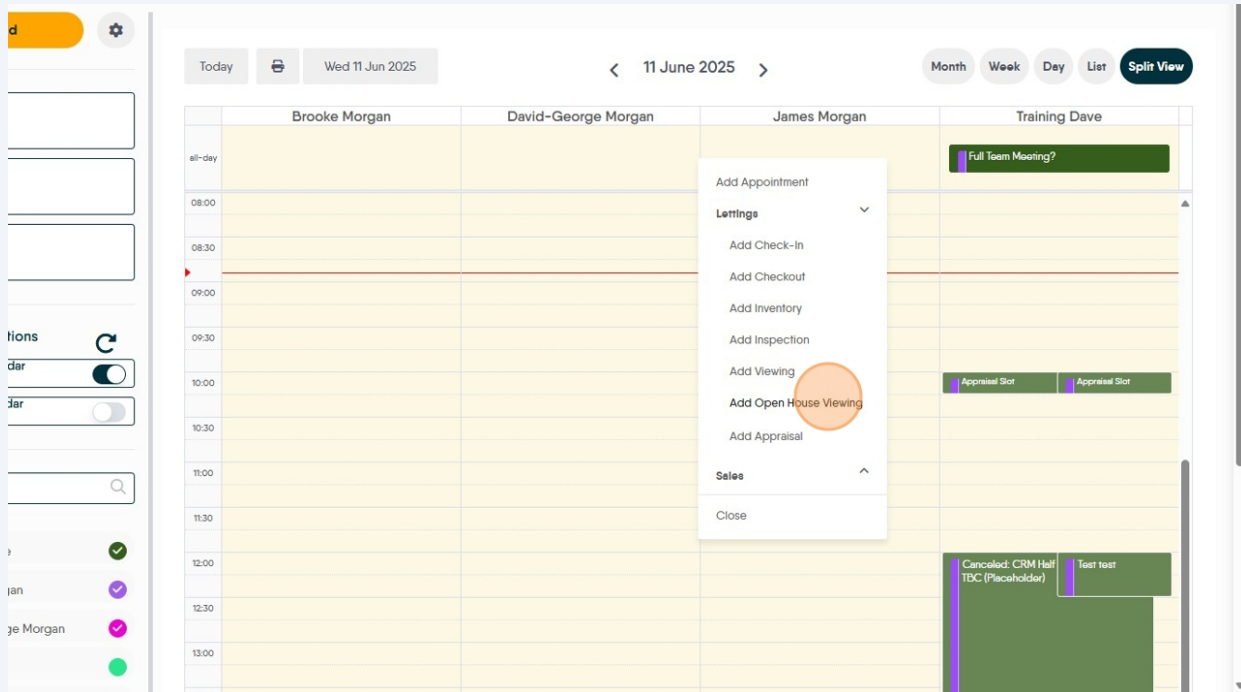


3

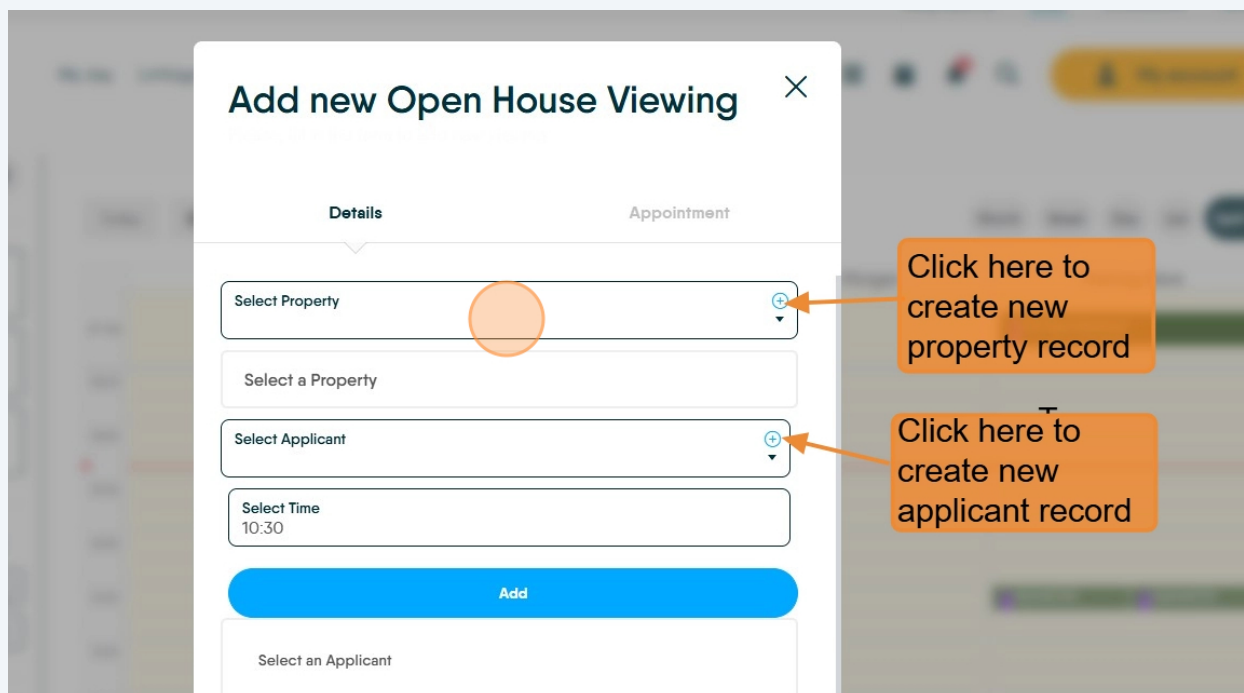
Click here and select the Sales or Lettings and then from the menu.



#### 4 Click "Add Open House Viewing"



#### 5 Click here and add the Property name. If you are adding a new property click the blue + icon.





Tip! Once the Property Details have been added it is a good idea to set the appointment criteria. The CRM will only allow you to book appointments that fit into the timescale you have set for the appointment.

6

Select the property from the list. This will then show the Owner/Landlord details and give the option to email them.

**Add new Open House Viewing** ✕

**Details** Appointment

Select Property  
57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK

Mrs Margaret Morgan  
57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK  
Mobile: 07799331177; Email: dm@vtuk.com

Select Applicant

Select Time  
10:30

Add

Select an Applicant

Cancel Save Viewing

7

Click here and add the Applicant, select them from the drop down menu, or click the blue + icon to add new.

The screenshot shows a mobile application interface with a 'Details' tab selected. The form contains the following elements:

- Select Property:** A dropdown menu showing '57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK'.
- Contact Information:** A section for 'Mrs Margaret Morgan' with address '57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK', mobile '07799331177', and email 'dm@vtuk.com'. It includes icons for phone, messages, email, and a profile.
- Select Applicant:** A dropdown menu with a blue '+' icon on the right. An orange circle highlights this field.
- Select Time:** A field showing '10:30'.
- Add:** A prominent blue button.
- Select an Applicant:** A text input field below the 'Add' button.
- Buttons:** 'Cancel' and 'Save Viewing' buttons at the bottom.

8

Click the "Select Time" field to set the time for the appointment, multiple appointments can be set for the same time and the default time can be edited, for example if you want 5 minute intervals just edit the end time to suit.

Click "Apply"

This screenshot shows the same form as above, but with updates:

- Select Applicant:** The dropdown now displays 'Sales applicant28 - zaggy.dave@gmail.com'. The orange circle remains on the 'Select Time' field.
- Select Time:** Still shows '10:30'.
- Add:** The blue button remains.
- Select an Applicant:** The text input field remains.
- Buttons:** 'Cancel' and 'Save Viewing' buttons remain at the bottom.

**Details** Appointment

**Select Property**  
57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK

**Mrs Margaret Morgan**  
57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK  
Mobile: 07799331177; Email: dm@vtuk.com

**Select Applicant**  
Sales applicant28 - zaggg.dave@gmail.com

**Select Time**  
10:30

09 10 11 25 30 35 Add Cancel Apply

Cancel Save Viewing

9

Repeat this process as many times as required. If you exceed the time allowed for that appointment the CRM will warn you, to resolve this click the 'Appointment' tab and extend the time you have allowed for the Open House.

10

Once all the Viewers have been added then the appointment can be set as 'Viewing Confirmed' and set the status as Booked.

**Details** Appointment

**Select Applicant**

**Select Time**

Add

1	Sales applicant28	10:30		
2	applicant135	10:30		
3	Mr Lettings Applicant	11:00		

Viewing Confirmed ☒ Status Select a status

Cancel Save Viewing

11 Select the "Booked" option.

The screenshot shows a mobile application interface for managing appointments. The 'Appointment' details form is open, displaying fields for 'Select Applicant' and 'Select Time'. Below these is a table of appointments:

	Applicant	Time	Actions
1	Sales applicant28	10:30	[Icon] [Icon] [Icon]
2	applicant135	10:30	[Icon] [Icon] [Icon]
3	Mr Lettings Applicant	11:00	[Icon] [Icon] [Icon]

At the bottom, there is a 'Viewing Confirmed' toggle switch and a 'Status' dropdown menu. The 'Status' dropdown is currently set to 'Booked', which is highlighted with an orange circle. Below the form are 'Cancel' and 'Save Viewing' buttons.

12 Click here to assign the appointment to a specific user. The default is always the person creating the appointment.

This screenshot shows the same 'Appointment' details form, but with the 'Assign to users' section expanded. The 'Status' dropdown remains 'Booked'. The 'Assign to users' section shows a list of users, with 'Training Dave' selected and highlighted by an orange circle. The 'Viewing Confirmed' toggle is also visible. The 'Cancel' and 'Save Viewing' buttons are at the bottom.



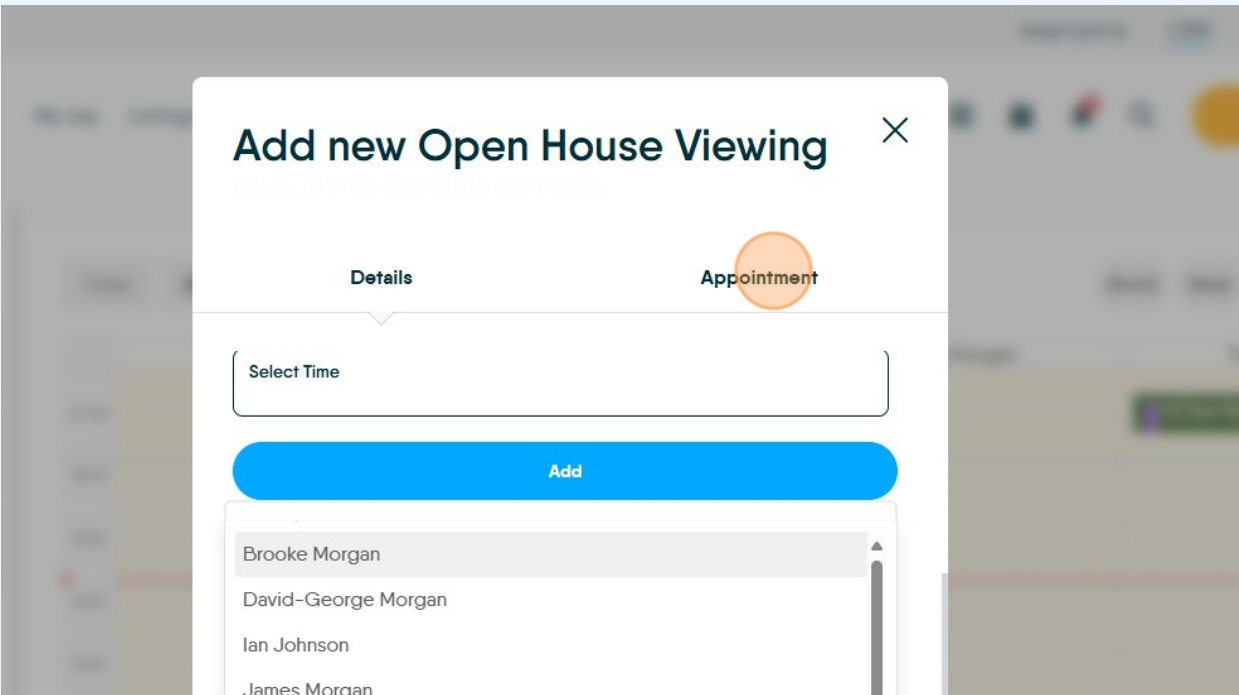
# Setting the Appointment length



Tip! Best practice is to do this when you start to create the Open House, CRM will only allow appointments to be created that fit into the timescale set in this section.

13

Click "Appointment"





14

If you are setting the appointment from the calendar the start and end will be the time you have clicked to Start the session and the End will be set at the default time for a Viewing (usually 30 minutes) Click here to set the end time for the appointment.

The Event title is the property name, this can be edited if required.

The screenshot shows a mobile application interface for adding a new open house viewing. The form is titled "Add new Open House Viewing" and has a close button (X) in the top right corner. Below the title, there are two tabs: "Details" and "Appointment". The "Appointment" tab is currently selected. The form contains several fields: "Start Time" (Wed 11 Jun 2025 10:30), "End Time" (Wed 11 Jun 2025 11:00), "Event title" (57 Elton Parade, Darlington - View), "Reminder" (dropdown), "Select Branch" (Morgan & Co), "Select Calendar" (Lettings), and "Accompanied" (toggle switch). The "End Time" field is highlighted with an orange circle. A note at the bottom states "Minimum 24 hours notice of appointments only." The "Meet At" dropdown is set to "Select a meeting spot".

**Add new Open House Viewing** X

Details Appointment

**Check Calendar**

**Start Time** \*  
Wed 11 Jun 2025 10:30

**End Time** \*  
Wed 11 Jun 2025 11:00

**Event title** \*  
57 Elton Parade, Darlington - View

**Reminder** ▼

**Select Branch** \*  
Morgan & Co ▼

**Select Calendar** \*  
Lettings X

Minimum 24 hours notice of appointments only.

**Accompanied** ☐

**Meet At** ▼  
Select a meeting spot

15 Check the Branch and Calendar options are correct.

If required, select the "Meet At" option.

The screenshot shows the 'Appointment' form with the 'Details' tab selected. The form contains the following fields and options:

- Check Calendar**
  - Start Time**: Wed 11 Jun 2025 10:30
  - End Time**: Wed 11 Jun 2025 11:00
  - Event title**: 57 Elton Parade, Darlington - View
  - Reminder**: (dropdown menu)
  - Select Branch**: Morgan & Co
  - Select Calendar**: Lettings X
- Minimum 24 hours notice of appointments only.**
- Accompanied**: (toggle switch, currently off)
- Meet At**: Property (dropdown menu, highlighted with an orange circle)
- Buttons**: Cancel, Save Viewing

16 Click "Select Property  
57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK57 Elton Parade, Darl..."

This screenshot is identical to the one in step 15, showing the 'Appointment' form with the 'Details' tab. The 'Meet At' dropdown menu is highlighted with an orange circle, indicating the next step in the process.

## 17 Click "Save Viewing"

The screenshot shows a mobile application interface with a modal form titled 'Appointment'. The form is divided into two tabs: 'Details' and 'Appointment'. The 'Appointment' tab is active. The form contains the following fields and controls:

- Event title**: 57 Elton Parade, Darlington - View
- Reminder**: A dropdown menu.
- Select Branch**: Morgan & Co
- Select Calendar**: Lettings (with an 'X' icon)
- Minimum 24 hours notice of appointments only.**
- Accompanied**: A toggle switch that is currently turned on.
- Meet At**: Property (with a dropdown arrow)
- Keys Held**: A toggle switch that is currently turned off.
- Key No**: 4
- Access Code**: 5735866
- Buttons**: 'Cancel' and 'Save Viewing' (the 'Save Viewing' button is highlighted with an orange circle).

## 18 Click "Save Viewing"

This screenshot is identical to the one in step 17, showing the 'Appointment' form with the 'Save Viewing' button highlighted. The form contains the same fields and controls as described in the previous block.

19 Click "Details"

The screenshot shows a mobile application interface for adding a new open house viewing. A modal window titled "Add new Open House Viewing" is displayed over a blurred background of a calendar. The modal has two tabs: "Details" (selected and highlighted with an orange circle) and "Appointment". The "Details" tab contains the following fields and controls:

- Event title:** A text field containing "57 Elton Parade, Darlington - View".
- Reminder:** A dropdown menu.
- Select Branch:** A dropdown menu showing "Morgan & Co".
- Select Calendar:** A dropdown menu showing "Lettings" with a close button (X).
- Minimum 24 hours notice of appointments only.** A text label.
- Accompanied:** A toggle switch that is currently turned on.
- Meet At Property:** A dropdown menu.
- Keys Held:** A toggle switch that is currently turned off.
- Key No:** A text field containing "4".
- Access Code:** A text field containing "5735866".

20 Click the "New time" field.

The screenshot shows the same mobile application interface, but now the "Appointment" tab is selected. The "Details" tab is still visible in the background. The "Appointment" tab contains the following fields and controls:

- Select Property:** A dropdown menu showing "57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK".
- Mrs Margaret Morgan:** A text field showing the contact information for the property manager, including address, mobile number, and email.
- Select Applicant:** A dropdown menu.
- Select Time:** A text field.
- Add:** A blue button.
- Table:** A table with two rows of appointments. The first row is highlighted with an orange circle around the "10:30" time field.

	Applicant	Time	Actions
1	Sales applicant28	10:30	[Edit] [Delete]
2	applicant135	10:30	[Edit] [Delete]

At the bottom of the modal, there are two buttons: "Cancel" and "Save Viewing".

## 21 Click "Apply"

The screenshot shows the 'Details' tab of an appointment management interface. At the top, there are two tabs: 'Details' (selected) and 'Appointment'. Below the tabs, there are several sections:

- Select Property:** A dropdown menu showing '57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK'.
- Client Information:** A card for 'Mrs Margaret Morgan' with address '57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK', mobile number '07799331177', and email 'dm@vtuk.com'. It includes icons for phone, messages, email, and profile.
- Select Applicant:** A dropdown menu.
- Select Time:** A dropdown menu.
- Add:** A large blue button.
- Table:** A table with two rows of appointments. The first row is 'Sales applicant28' at '10:30'. The second row is 'applicant135' at '10:30'. Each row has icons for edit and delete.
- Time Picker:** A circular time picker is open, showing the time '10:30'. The 'Apply' button is highlighted with an orange circle.

## 22 Click "Save Viewing"





The screenshot shows the 'Details' tab of the same appointment management interface. The 'Apply' button in the time picker is no longer visible. Instead, there are two buttons at the bottom: 'Cancel' and 'Save Viewing'. The 'Save Viewing' button is highlighted with an orange circle.

## 23 Click "57 Elton Parade, Darlington - Viewing Open House"

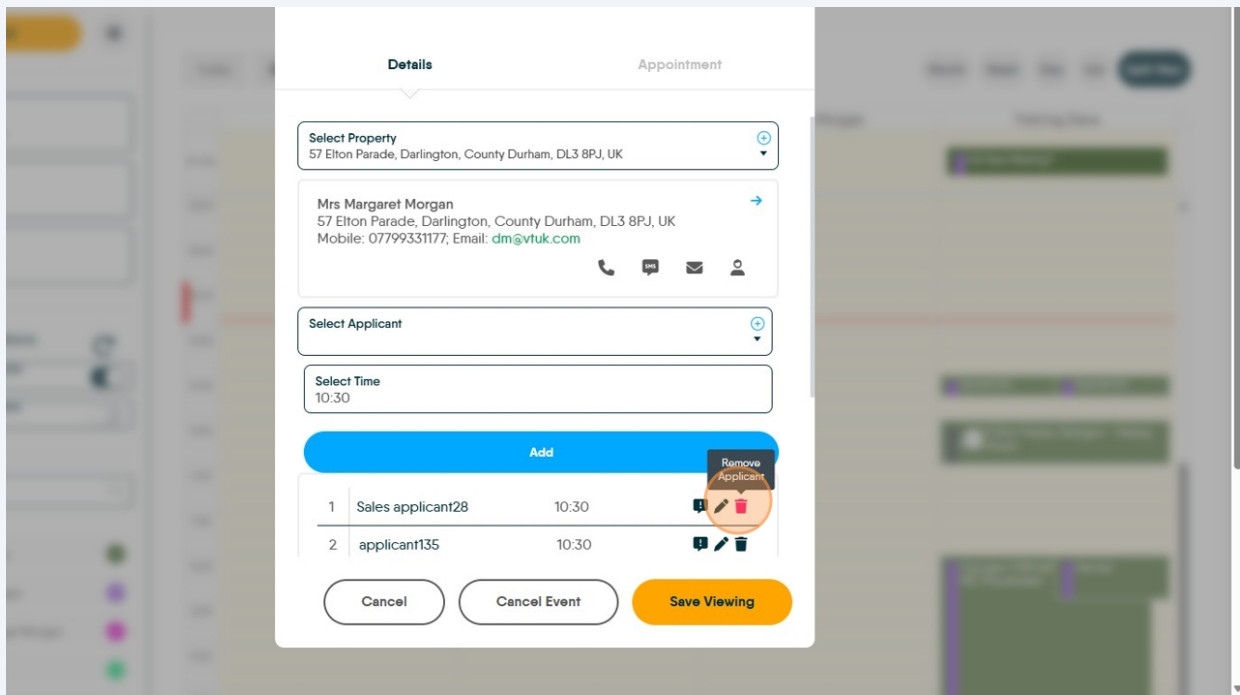
The screenshot shows a calendar application interface. At the top, there's a navigation bar with 'Today', 'Wed 11 Jun 2025', and a date selector for '11 June 2025'. Below this are tabs for 'Month', 'Week', 'Day', 'List', and a 'Split View' button. The main area is a calendar grid with columns for 'Brooke Morgan', 'David-George Morgan', 'James Morgan', and 'Training Dave'. The time slots range from 08:00 to 13:00. A red horizontal line is drawn across the grid at the 09:00 mark. A green event card is visible in the 'Training Dave' column, titled '57 Elton Parade, Darlington - Viewing Open House'. A tooltip is displayed over this card, showing the following details: Property: 57 Elton Parade DL3 8PJ, Confirmed: Yes, Cancelled: No, Event Type: Viewing Open House, Event Time: 10:30 - 11:00. An orange circle highlights the event card in the calendar grid.

## 24 Click "Edit the details for this viewing"

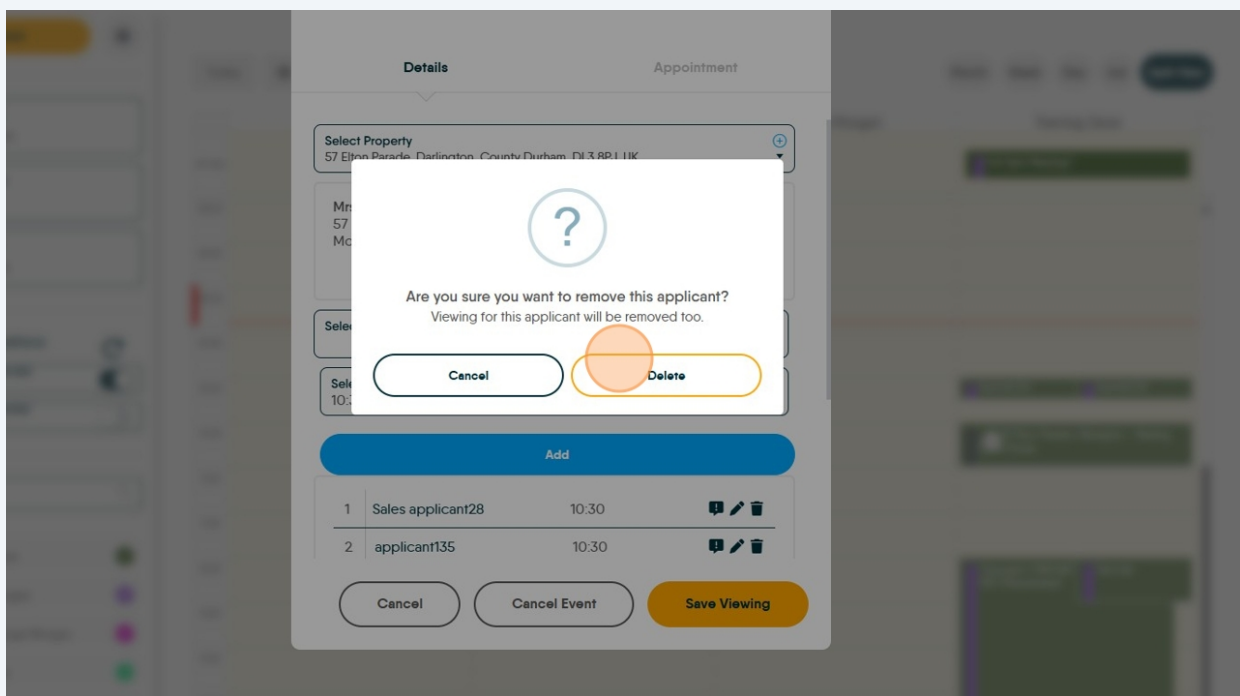
The screenshot shows a modal form titled 'Edit Open House Viewing' with a close button (X) in the top right corner. The form has two tabs: 'Details' (selected) and 'Appointment'. Under the 'Details' tab, there are several fields: 'Select Property' (57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK), 'Mrs Margaret Morgan' (57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK; Mobile: 07799331177; Email: dm@vtuk.com), 'Select Applicant', and 'Select Time' (10:30). Below these fields is a blue 'Add' button. At the bottom, there is a table with two rows of data:

1	Sales applicant28	10:30	 
2	applicant135	10:30	 

25 Click here.



26 Click "Delete"





27 Select the "Cancelled" option.

The screenshot shows a 'Details' modal for an appointment. At the top, there are tabs for 'Details' and 'Appointment'. Below the tabs, there are input fields for 'Select Applicant' and 'Select Time' (10:30). A blue 'Add' button is present. Below this is a table with two rows:

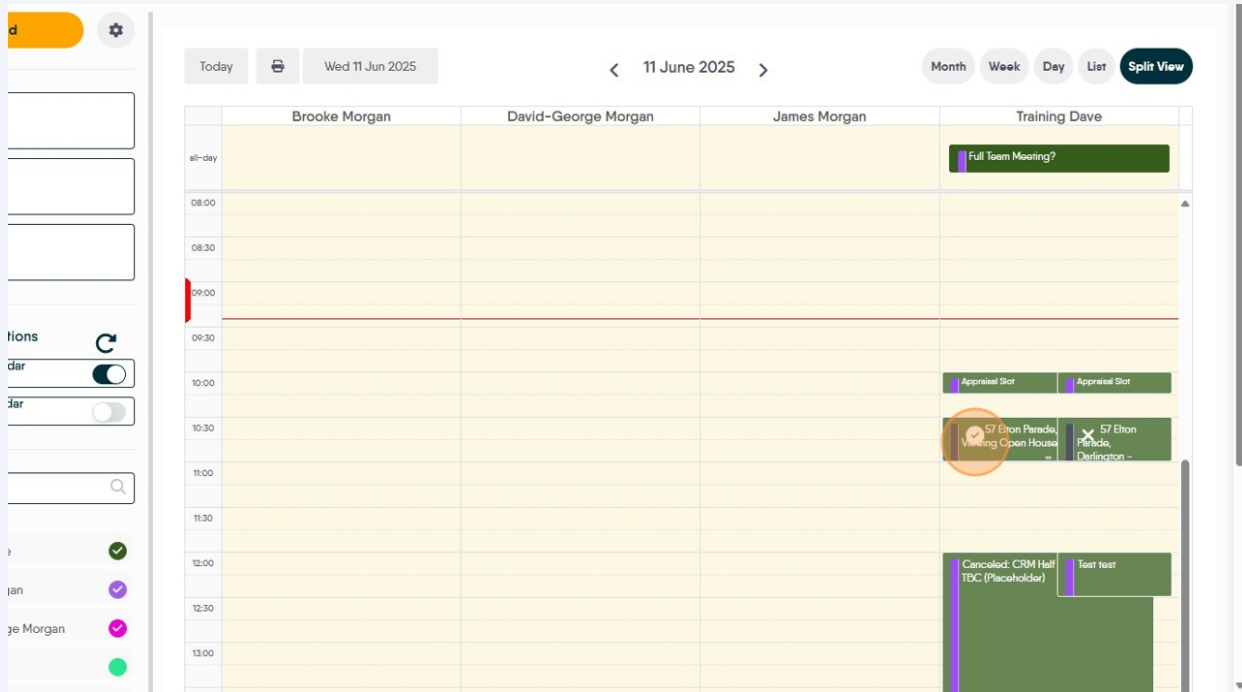
	Applicant	Time	Actions
1	applicant135	10:30	[Share] [Edit] [Delete]
2	Mr Lettings Applicant	11:00	[Share] [Edit] [Delete]

Below the table, there is a 'Viewing Confirmed' toggle switch (turned on) and a 'Status' dropdown menu. The 'Status' dropdown is open, showing 'Cancelled' as the selected option, which is highlighted with an orange circle. Below the status dropdown is an 'Assign to users' section with a tag 'Training Dave' and a close button 'X'. At the bottom, there are three buttons: 'Cancel', 'Cancel Event', and 'Save Viewing'.

28 Click "Save Viewing"

This screenshot is identical to the one above, showing the 'Details' modal. The 'Status' dropdown is still open, and 'Cancelled' is selected. The 'Save Viewing' button at the bottom right is now highlighted with an orange circle, indicating the next step in the process.

29 Click "57 Elton Parade, Darlington - Viewing Open House"



30 Click "Loading..."

