

# 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"



Details

Checklist

Appraisals

Compliance

Information

Stats

Marketing

Media

Rooms

Portals

Viewings

Offers

NOI

PROPERTY PICTURES

Upload

Solicitor/Conveyancing

Add Solicitor

Solicitor Instructed

Instructed Date

Solicitor

Contact

Content Approval

Vendor has approved this content

Property Address

Edit Address

Postcode

DL2 2HX

Address

112 Yew Tree Close, Hurworth on Tees, Darlington, Durham, DL

Price/Instructed Date

Currency

Prefix

Offers In Excess Of

Price (GBP)

£

375,000

Instructed Date

03/01/2025

iamproperty CRM movebutle

iamproperty

My day

Lettings

Sales

Accounts

Reporting

Communications

Details

Checklist

Appraisals

Compliance

Information

Stats

Marketing

Media

Rooms

Portals

Add Viewing

Sort Viewings

Date Range

24/10/2024 - 24/02/2025

Search

Clear filters

Status

Upcoming

Old Viewings

Confirmed

Not Confirmed

03 Jan 2025

12:00 - 12:30

SA

sales Applicant26

zagg.dave@gmail.com

★★★★★

Confirmed

Training Da...

1 Viewings Found

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

Details

Checklist

Viewings

Offers

Linked Applicants

Contacts

Documents

Journal

SA

sales Applicant26

zagg.dave@gmail.com

Reference:

Negotiator: Training Dave

Branch: Morgan & Co

Status: Active

Personal Information

|                                   |                        |                     |                 |
|-----------------------------------|------------------------|---------------------|-----------------|
| Title                             | 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

iam property

My day Lettings Sales Accounts Reporting Communications

Latest Offer

£375,000.00

Offer Status

Accepted

Applicant Status

✓

Applicant Temp.

H

Last Contacted

Details

Checklist

Viewings

Offers

Linked Applicants

Contacts

SA

sales Applicant26

zagg.dave@gmail.com

Reference:

Negotiator: Training Dave

Branch: Morgan & Co

Status: Active

+ Add Viewing

Sort Viewings

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

Search

Clear filters

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 | <u>Call Landlord</u> |  High   | 15/Nov/2024 | 15/Nov/2 |
|  |  Not Started | <u>test</u>          |  High   | 27/Nov/2024 | 27/Nov/2 |
|  |  Not Started | <u>Call Landlord</u> |  Medium | 12/Dec/2024 | 12/Dec/2 |
|  |  Not Started | <u>Call back</u>     |  High   | 03/Jan/2025 | 03/Jan/2 |
|  |  Not Started | <u>Make Tea</u>      |  High   | 07/Jan/2025 | 07/Jan/2 |

# 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

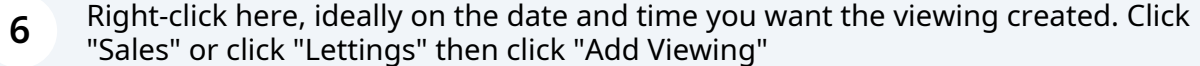
My tasks

|                                                                                     | Status                                                                                          | Name                 | Priority                                                                                     | Start date  | Due date |
|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|----------------------|----------------------------------------------------------------------------------------------|-------------|----------|
|  |  Not Started | <u>Call Landlord</u> |  High   | 15/Nov/2024 | 15/Nov/2 |
|  |  Not Started | <u>test</u>          |  High   | 27/Nov/2024 | 27/Nov/2 |
|  |  Not Started | <u>Call Landlord</u> |  Medium | 12/Dec/2024 | 12/Dec/2 |
|  |  Not Started | <u>Call back</u>     |  High   | 03/Jan/2025 | 03/Jan/2 |
|  |  Not Started | <u>Make Tea</u>      |  High   | 07/Jan/2025 | 07/Jan/2 |





5



Appointment +

Check-In +

Checkout +

Inventory +

Reception +

Sales (Sales) +

Lettings (Lettings) +

Viewing (Sales) +

Viewing (Lettings) +

Open House (Sales) +

Open House (Lettings) +

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   |  | Appraisal Slot                                     |
| 10:30   |  |                                                    |
| 11:00   |  | Appraisal: 5 Year Tree Close, Hurworth, Darlington |
| 11:30   |  |                                                    |
| 12:00   |  |                                                    |
| 12:30   |  |                                                    |
| 13:00   |  |                                                    |
| 13:30   |  |                                                    |

Appointment +

Check-In +

Checkout +

Inventory +

Reception +

Sales (Sales) +

Lettings (Lettings) +

Viewing (Sales) +

Viewing (Lettings) +

Open House (Sales) +

Open House (Lettings) +

Today

Tue 21 Jan 2025

< 21 January 2025 >

Month Week Day List Split View

David-George Morgan

Training Dave

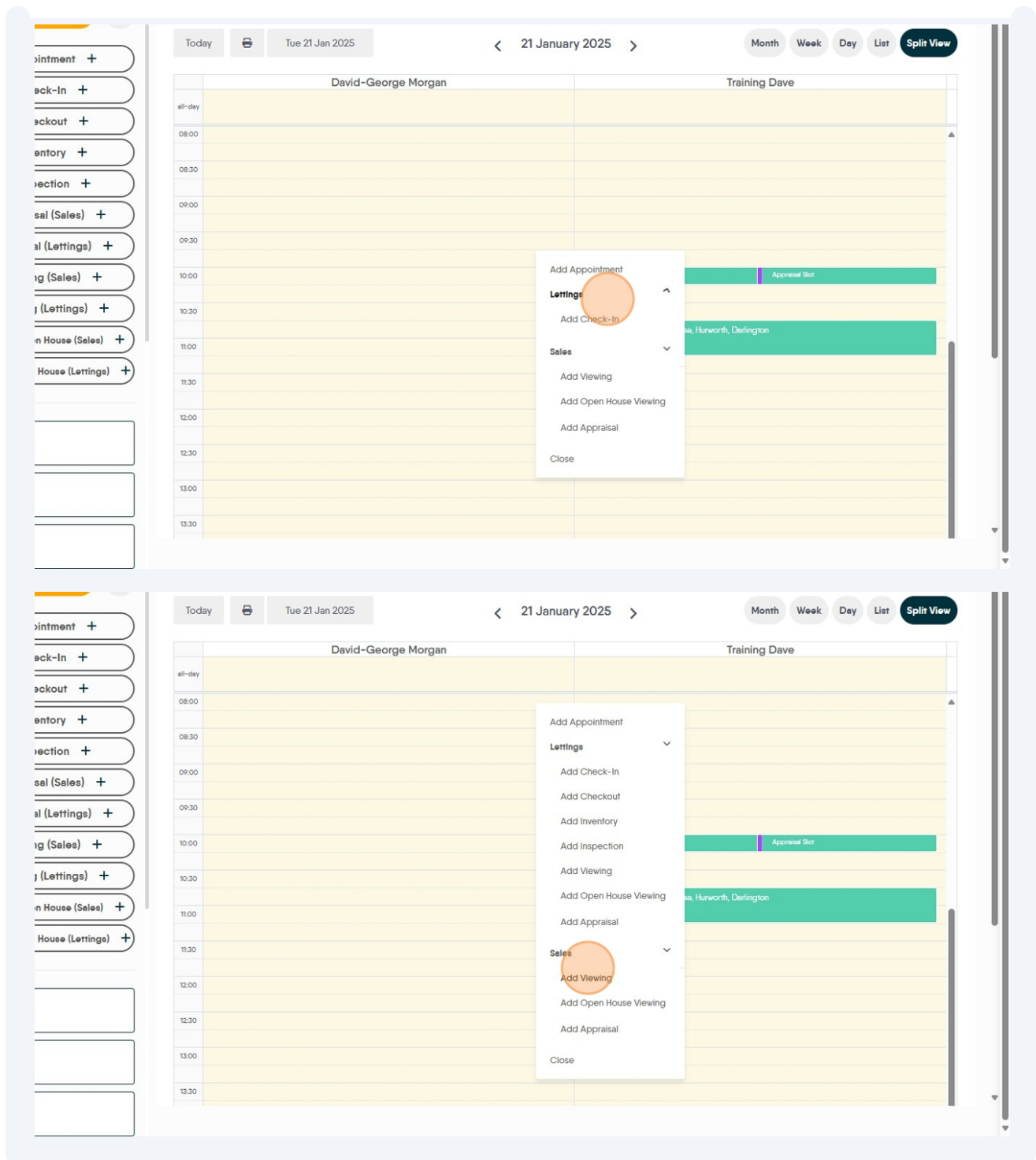
|         |  |                                                    |
|---------|--|----------------------------------------------------|
| all-day |  |                                                    |
| 08:00   |  |                                                    |
| 08:30   |  |                                                    |
| 09:00   |  |                                                    |
| 09:30   |  |                                                    |
| 10:00   |  | Appraisal Slot                                     |
| 10:30   |  |                                                    |
| 11:00   |  | Appraisal: 5 Year Tree Close, Hurworth, Darlington |
| 11:30   |  |                                                    |
| 12:00   |  |                                                    |
| 12:30   |  |                                                    |
| 13:00   |  |                                                    |
| 13:30   |  |                                                    |

Add Appointment

Lettings

Sales

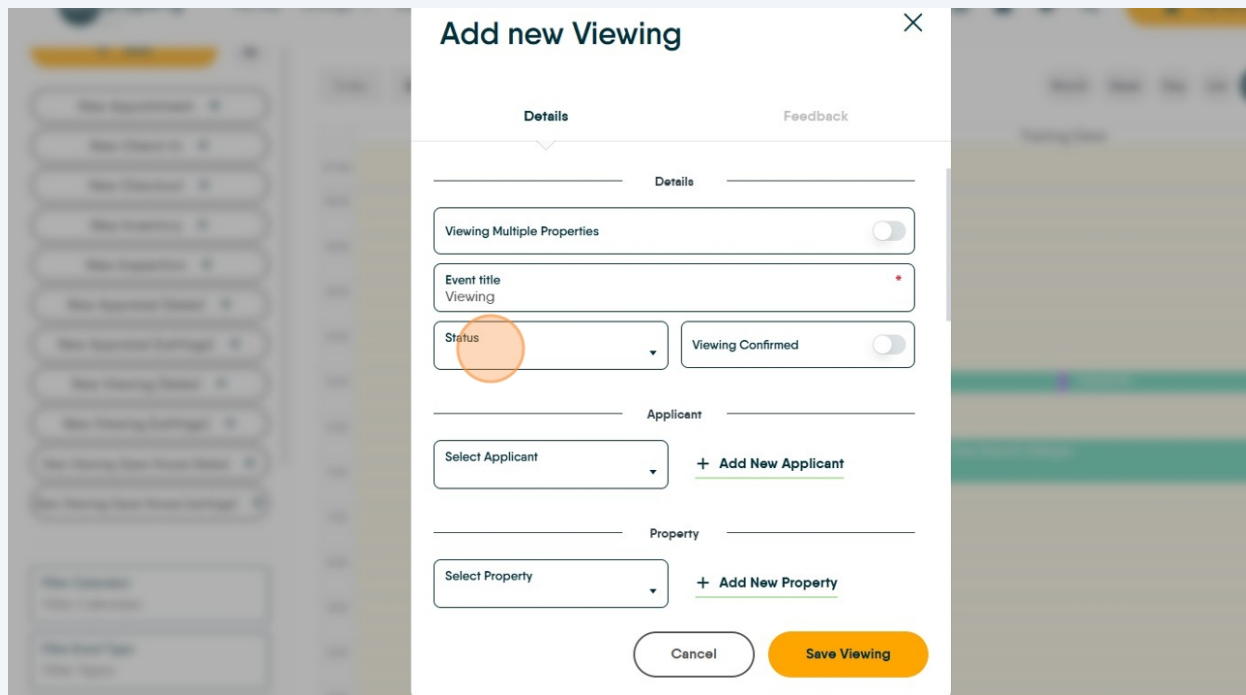
Close



## Creating the Viewing

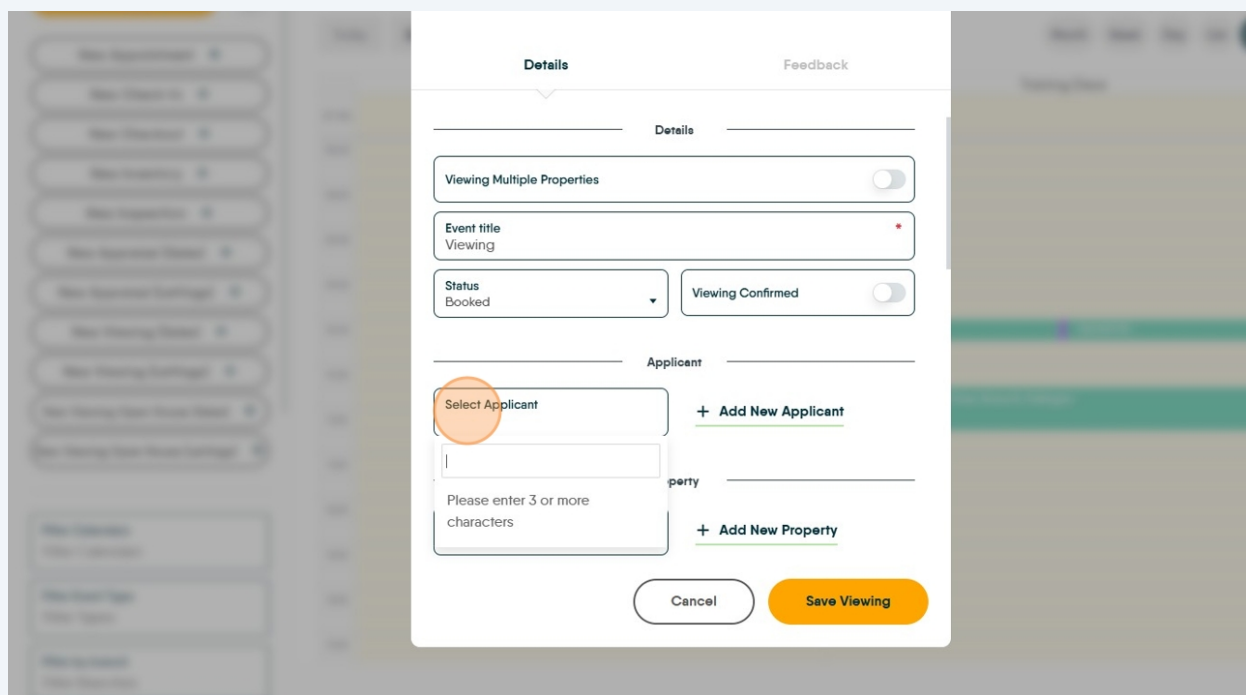
7 From here the process is the same for both Sales and Lettings.

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



The screenshot shows a mobile app 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 tabs: "Details" (selected) and "Feedback". The "Details" tab contains several sections: "Viewing Multiple Properties" with a toggle switch, "Event title" with a text input field containing "Viewing", "Status" with a dropdown menu highlighted by an orange circle, and "Viewing Confirmed" with a toggle switch. Below these are sections for "Applicant" and "Property", each with a "Select" dropdown and a "+ Add New" link. At the bottom are "Cancel" and "Save Viewing" buttons.

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



This screenshot shows the same "Add new Viewing" form, but with the "Applicant" dropdown menu highlighted by an orange circle. The dropdown is open, showing a search input field with the placeholder text "Please enter 3 or more characters". The "Status" dropdown now shows "Booked". The "Event title" field now has a red asterisk, indicating it is required. The "Add New Applicant" and "Add New Property" links are underlined in green.

9

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

**Add new Viewing**

Details Feedback

Property

Select Property + Add New Property

Please enter 3 or more characters

Appointment

Start Time Tue 21 Jan 2025 11:45 End Time Tue 21 Jan 2025 12:15

Select Calendar

**Add new Viewing**

Details Feedback

Property

Select Property + Add New Property

5 yew

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

55 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK

15 Yew Tree Close, Hurworth,

Appointment

Start Time Tue 21 Jan 2025 11:45 End Time Tue 21 Jan 2025 12:15

Select Calendar

Cancel Save Viewing

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.



**Add new Viewing**

**Details** Feedback

**Appointment**

**Start Time**  
Tue 21 Jan 2025 11:45

**End Time**  
Tue 21 Jan 2025 12:15

**Select Calendar**  
Sales

**Reminder**

**Assign to users**  
Training Dave

**Select Branch**  
Morgan & Co

**Meet At**

Calendar: January 2025  
21 January 2025 Tuesday

- 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

The screenshot shows the 'Add new viewing' form with the 'Details' tab selected. The form contains the following fields:

- Start Time:** Tue 21 Jan 2025 11:45
- End Time:** Tue 21 Jan 2025 12:15
- Select Calendar:** Sales (with an 'X' to remove it)
- Reminder:** (empty dropdown menu, highlighted with an orange circle)
- Assign to users:** Training Dave (with an 'X' to remove it)
- Select Branch:** Morgan & Co
- Accompanied:** (toggle switch)
- Meet At:** (empty dropdown menu)

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

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

This screenshot shows the same 'Add new viewing' form, but the 'Assign to users' dropdown menu is open. An orange circle highlights the search field at the top of the dropdown. The dropdown list contains the following names:

- Training Dave (highlighted)
- Brooke Morgan
- David-George Morgan
- Ian Johnson
- James Morgan
- Training Dave
- VTIK HSEFR

13 If the viewing is accompanied click here.

The screenshot shows a mobile application interface for creating an appointment. The form is titled 'Appointment' and has two tabs: 'Details' and 'Feedback'. The 'Details' tab is active. The form contains several fields: 'Start Time' (Tue 21 Jan 2025 11:45), 'End Time' (Tue 21 Jan 2025 12:15), 'Select Calendar' (Sales), 'Reminder' (5 minute(s) before), 'Assign to users' (Select users to assign to), 'Select Branch' (Morgan & Co), 'Accompanied' (toggle switch), and 'Meet At' (dropdown menu). The 'Accompanied' toggle switch is highlighted with an orange circle, indicating it should be turned on. At the bottom of the form are 'Cancel' and 'Save Viewing' buttons.

14 Set where you are meeting, click here.

The screenshot shows the same mobile application interface as in the previous image, but with the 'Meet At' dropdown menu highlighted by an orange circle. The dropdown menu is open, showing two options: 'Estate agents' and 'Property'. The 'Accompanied' toggle switch is now turned on. The 'Cancel' and 'Save Viewing' buttons are still visible at the bottom.

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

The screenshot shows a 'Details' form with the following fields:

- Reminder:** 5 minute(s) before
- Assign to users:** Select users to assign to
- Select Branch:** Morgan & Co
- Accompanied:** Toggle switch (checked)
- Meet At:** Estate agents
- Keys Held:** Toggle switch (unchecked)
- Key No:** Text input field
- Access Code:** Text input field
- Viewing Arrangements:** Text input field (highlighted with an orange circle)

At the bottom of the form are two buttons: 'Cancel' and 'Save Viewing'.



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"

The screenshot shows a 'Details' form for a viewing appointment. The form has two tabs: 'Details' and 'Feedback'. The 'Details' tab is active. The form contains the following fields and controls:

- Reminder:** A dropdown menu set to '5 minute(s) before'.
- Assign to users:** A text input field with the placeholder 'Select users to assign to'.
- Select Branch:** A dropdown menu set to 'Morgan & Co'.
- Accompanied:** A toggle switch that is currently turned on.
- Meet At:** A dropdown menu set to 'Estate agents'.
- Keys Held:** A toggle switch that is currently turned off.
- Key No:** A text input field.
- Access Code:** A text input field.
- Viewing Arrangements:** A large text input field.
- Buttons:** At the bottom right, there are two buttons: 'Cancel' and 'Save Viewing'. The 'Save Viewing' button is highlighted with an orange circle.

## 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.

The screenshot shows a calendar view for Tuesday, 21 January 2025. The calendar is split into two columns: 'David-George Morgan' and 'Training Dave'. The time slots range from 08:00 to 13:30. The following appointments are visible:

- Appointment Slot:** A green bar at 10:00.
- Appointment Slot:** A green bar at 10:30.
- Appointment: 5 Year Time Close, Hunworth, Darlington:** A green bar at 11:00.
- Viewing - 5 Year Time Close, Hunworth, Darlington, Durham, DL2 2HX:** A red bar at 12:00. This bar is highlighted with an orange circle.

- 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"



DetailsFeedback

Details

Viewing Multiple Properties

Event title

Viewing - 5 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX

Status

Booked

Viewing Confirmed

Applicant

Select Applicant

Mr Sales Applicant11

+ Add New Applicant

Mr Sales Applicant11

1 Kingsway, Darlington, County Durham, DL1 3EY, UK

Mobile: Email: [zagg.dave5@gmail.com](mailto:zagg.dave5@gmail.com)

Add new call

Send SMS

Send Email

Cancel

Cancel Event

Save Viewing

To:

[zagg.dave5@gmail.com](mailto:zagg.dave5@gmail.com)

X

CC:

Bcc:

Subject: {Property Address}

File Edit View Insert Format Tools Table

B

I

U

System Font 12pt

Prop. Google Directions

Prop. Viewing Date and Time

App. Company Name

App. Phone

App. Work phone

App. Mobile phone

App. Email

App. Title

App. Forename

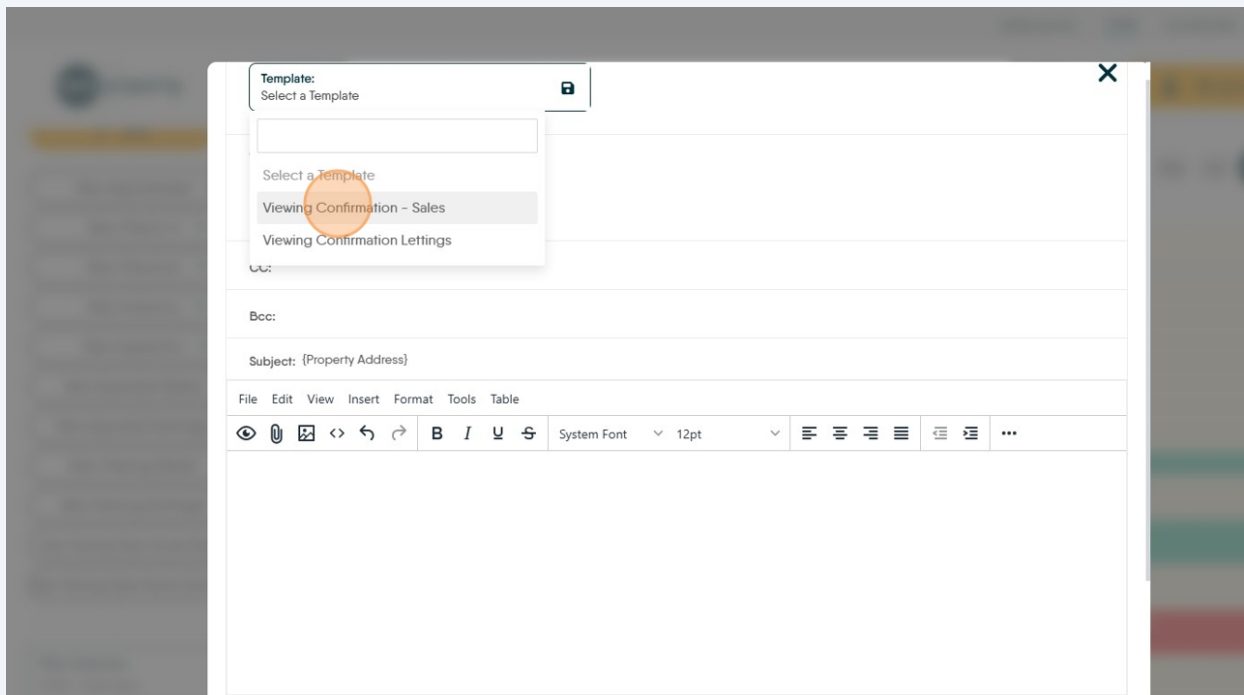
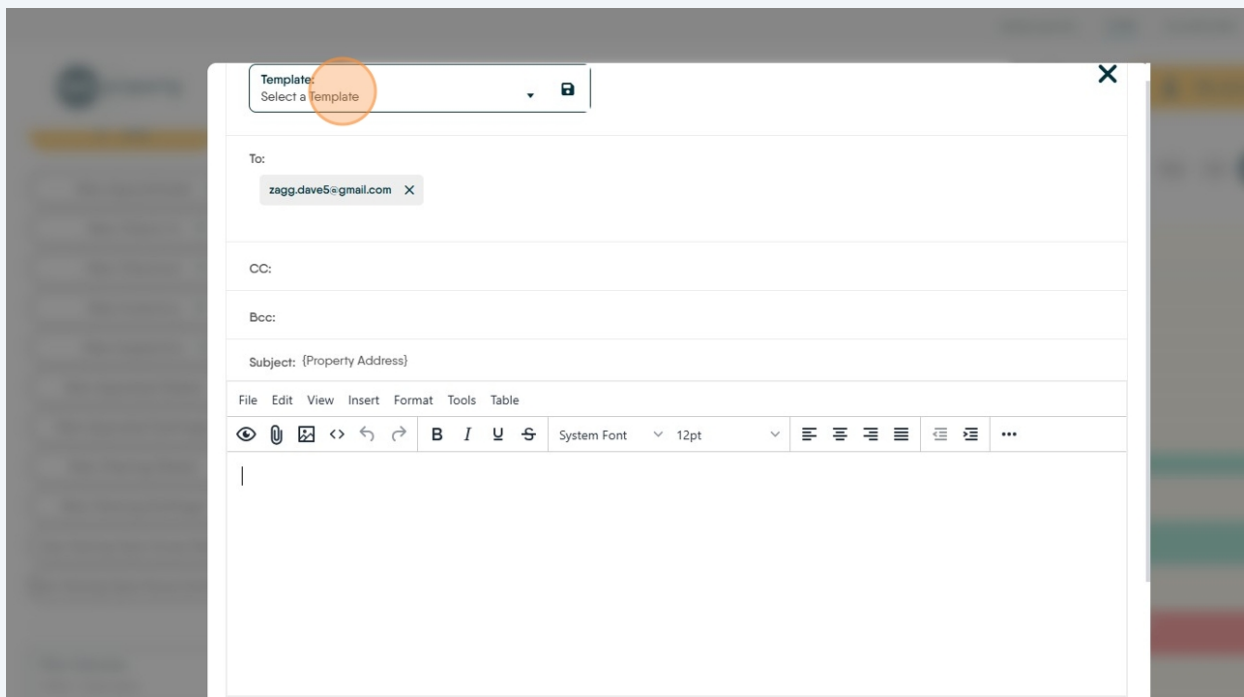
App. Surname

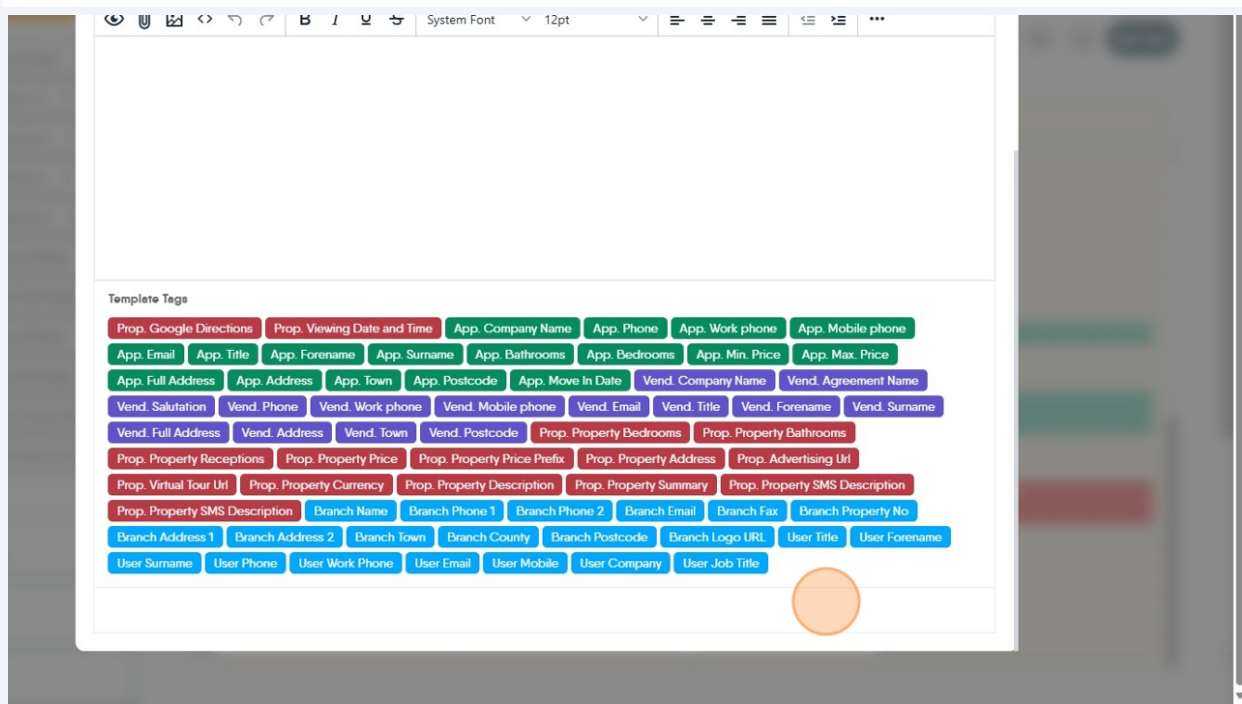
App. Bathrooms

App. Bedrooms

App. Min. Price

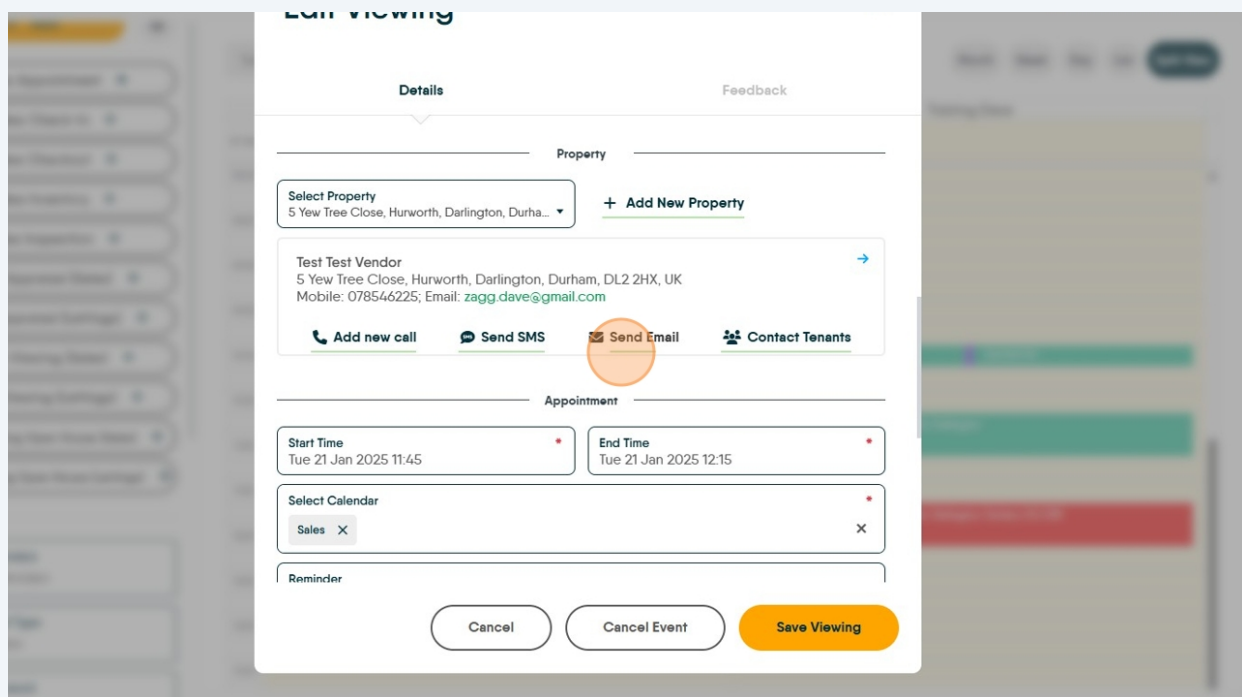
App. Max. Price





20

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



### Edit Viewing

Details Feedback

Property

Select Property  
5 Yew Tree Close, Hurworth, Darlington, Durha...  
+ Add New Property

Test Test Vendor  
5 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK  
Mobile: 078546225; Email: [zagg.dave@gmail.com](mailto:zagg.dave@gmail.com)  
Add new call Send SMS Send Email Contact Tenants

Appointment

Start Time  
Tue 21 Jan 2025 11:45  
End Time  
Tue 21 Jan 2025 12:15  
Select Calendar  
Sales X  
Reminder

Cancel Cancel Event Save Viewing

21

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

### Edit Viewing

Details Feedback

Property

Select Property  
5 Yew Tree Close, Hurworth, Darlington, Durha...  
+ Add New Property

Test Test Vendor  
5 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK  
Mobile: 078546225; Email: [zagg.dave@gmail.com](mailto:zagg.dave@gmail.com)  
Add new call Send SMS Send Email Contact Tenants

Appointment

Start Time  
Tue 21 Jan 2025 11:45  
End Time  
Tue 21 Jan 2025 12:15  
Select Calendar  
Sales X  
Reminder

Cancel Cancel Event Save Viewing