Creating a New Sales or Lettings Viewing Appointment in CRM
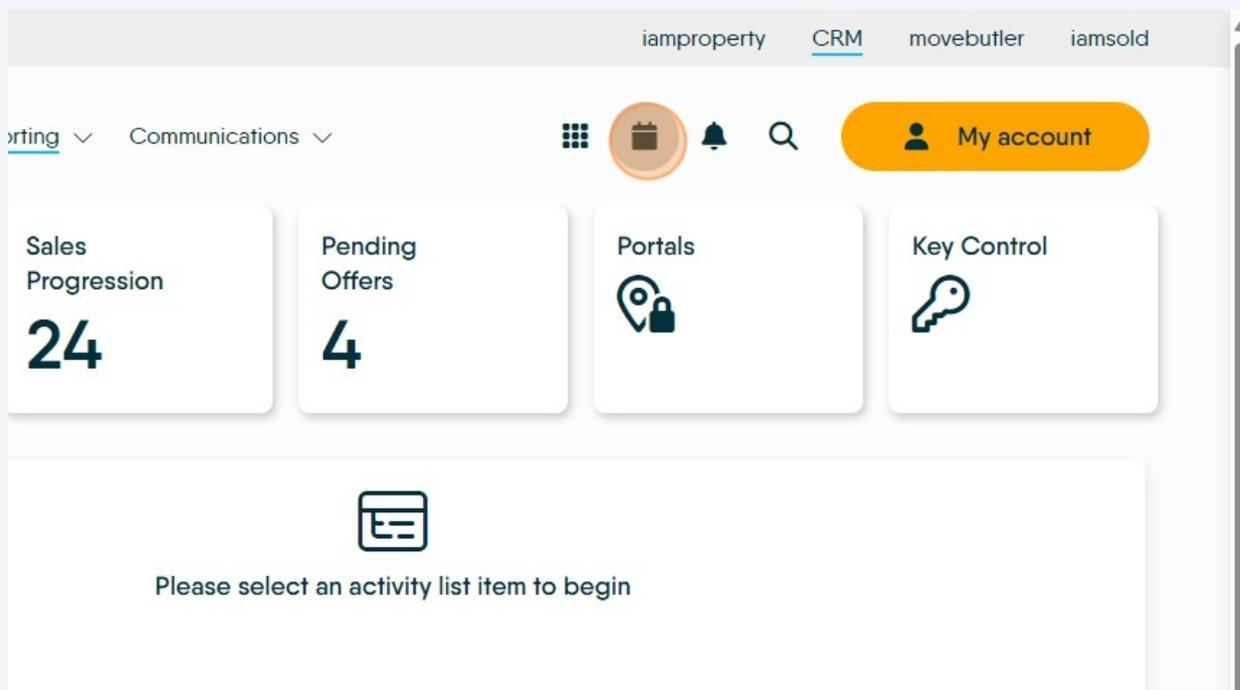
This guide offers a comprehensive step-by-step process for creating and managing sales and letting viewing appointments in the CRM system, making it essential for real estate professionals.

By following these instructions, users can efficiently schedule viewings, ensure all necessary details are communicated, and streamline the confirmation process for both applicants and landlords. Additionally, the guide highlights how to utilise email templates for quick communication, enhancing productivity.

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

Opening the Calendar and creating an entry

2   Click "Calendar" You can also access the calendar from the My Day screen and the 'Bento' menu.

3 Click "Add"

4 Click "New Appointment" or any other option from the drop down menu.

Adding a 'New Appointment'

5 To create this type of appointment. Click this text field.

Add New Appointment ✕

My Event Details   Reminder / Recurrence

Event title *
|

All day? ◯

Location
Add location

Start Time *
Thu 02 Jan 2025 16:08

End Time *
Thu 02 Jan 2025 16:38

Select Branch *
Morgan & Co ▾

Calendar ❓

6 Click the "Add location" field.

7 Click the "Start Time" field. Select the date and start time for your appointment from here.

8 Click the "End Time" field.

9 to select the calendar to add the record to. Click this search field.
Click "Sales" or the calendar you are using.
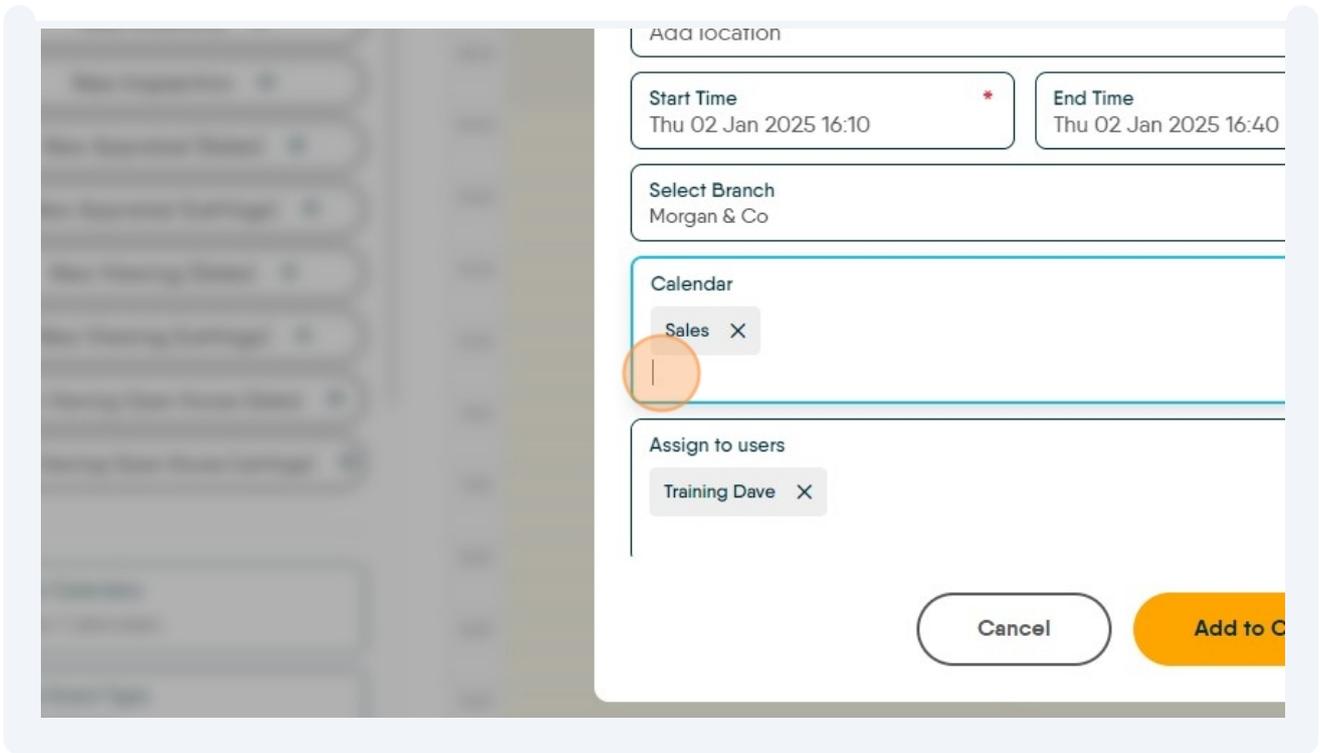
10 Click "Add to Calendar" to add the entry to your calendar.
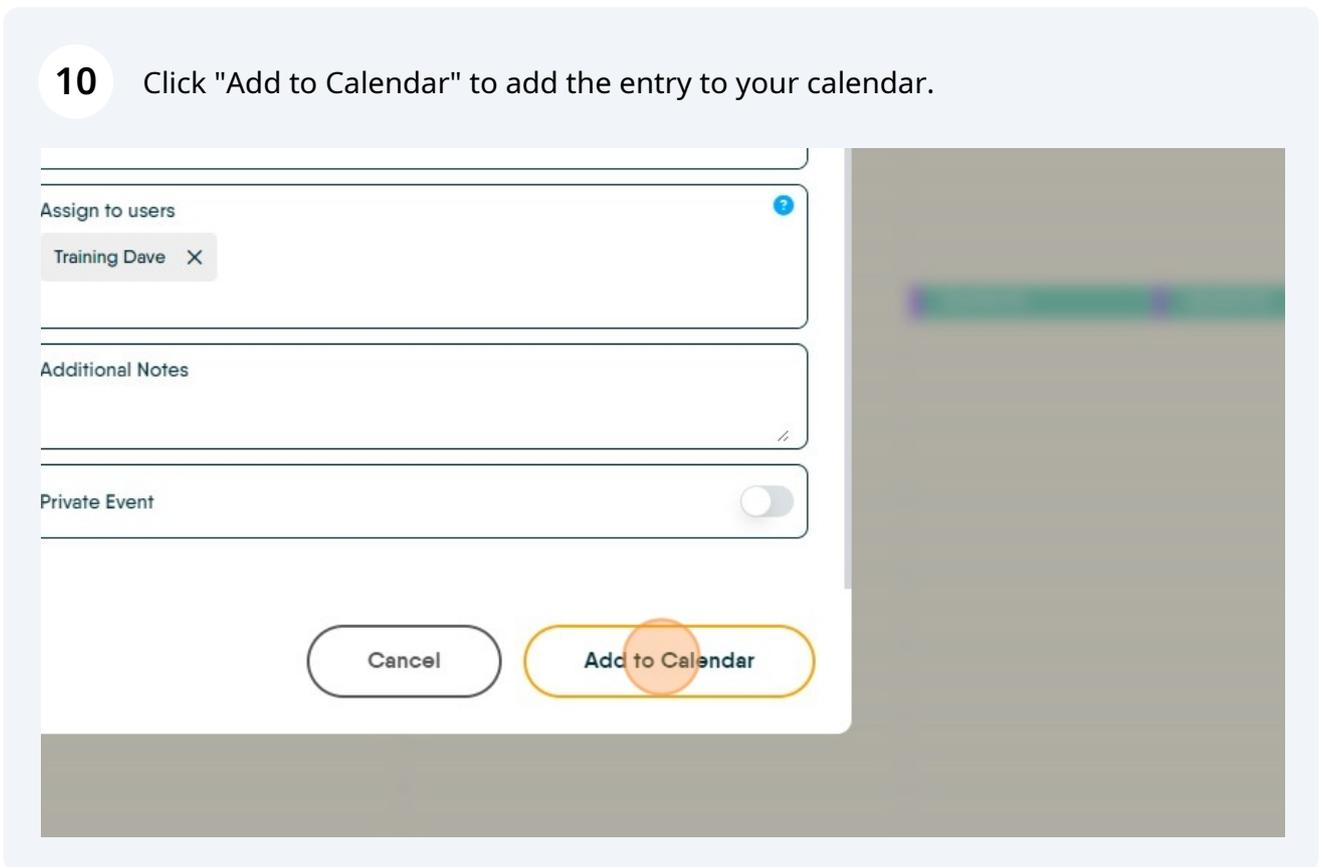
Adding a Viewing Appointment from calendar.

ⓘ You can also add a Viewing appointment from the calendar screen, by right clicking on the time and date you want to set the appointment. The process is the same as below, however the time and date is set as the time/date you selected by right clicking (it can be edited).

11 Click "New Viewing (Sales)" or Lettings as required.

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

all-day

08:00

08:30

09:00

09:30

10:00

10:30

11:00

11:30

12:00

12 Click here. Search for the applicant you are creating the viewing for, you can add a new applicant from here as well, by using the 'Add New Applicant' option.
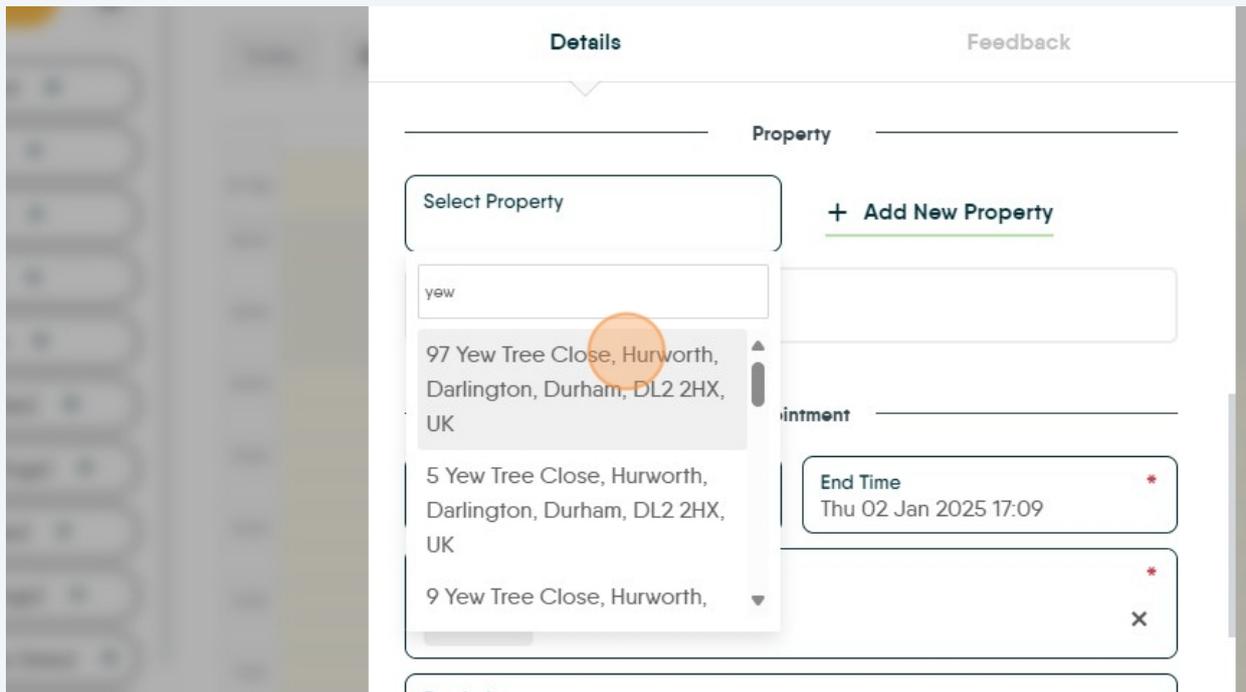

13 Click here and search for the property. You can add a new property from here as well.

14 Click the property name you want to use.

15 Click here and select the start date and time for the viewing.
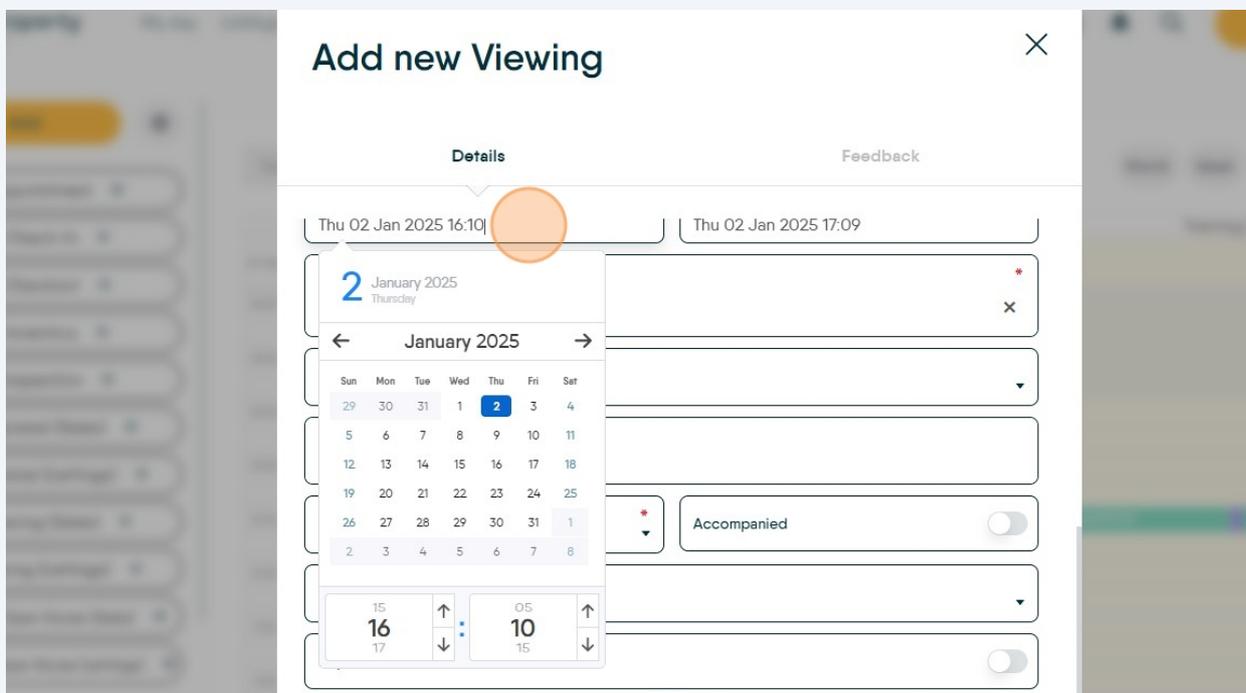
16 Click here and set the end date/time.
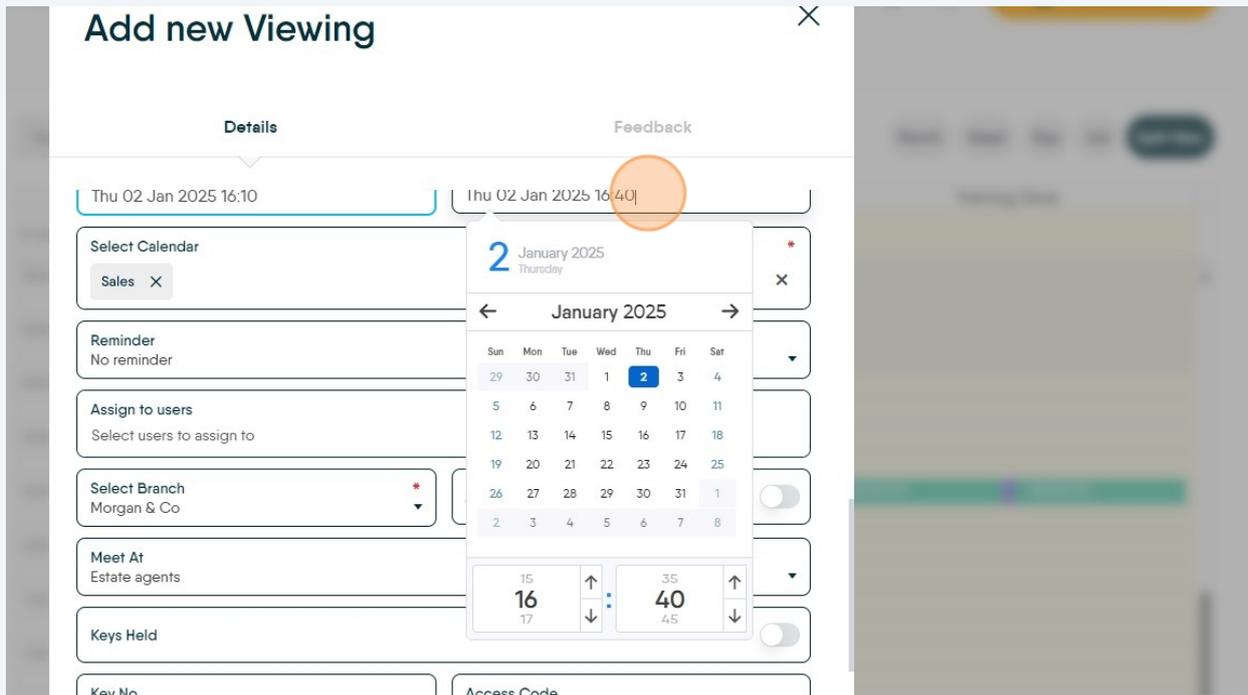
17 Click this search field and select the appropriate calendar.
Click the "Select calendar to assign to" field.
Select the appropriate calendar

18 Click the "Select users to assign to" field. Allocate the viewing to whoever is conducting the viewing.
Click the user you are creating the appointment for
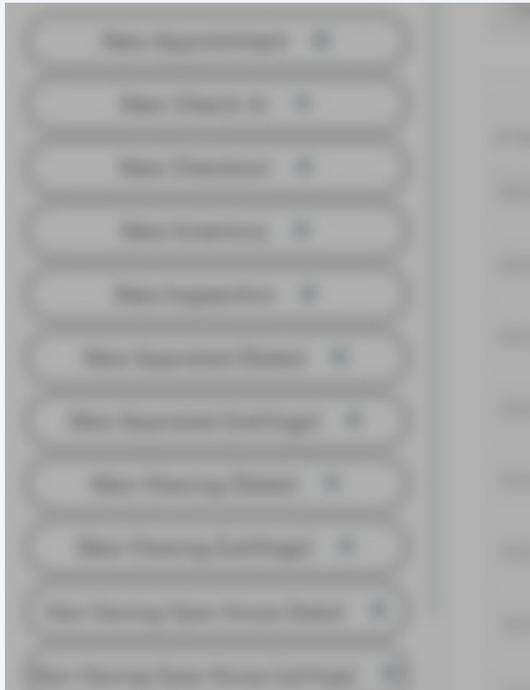
Thu 02 Jan 2025 16:10   Thu 02 Jan 2025 16:40

Select Calendar

Sales ✕

Reminder
No reminder

Assign to users
Select users to assign to

Brooke Morgan

David-George Morgan

Ian Johnson

James Morgan

Training Dave

VTUK USER

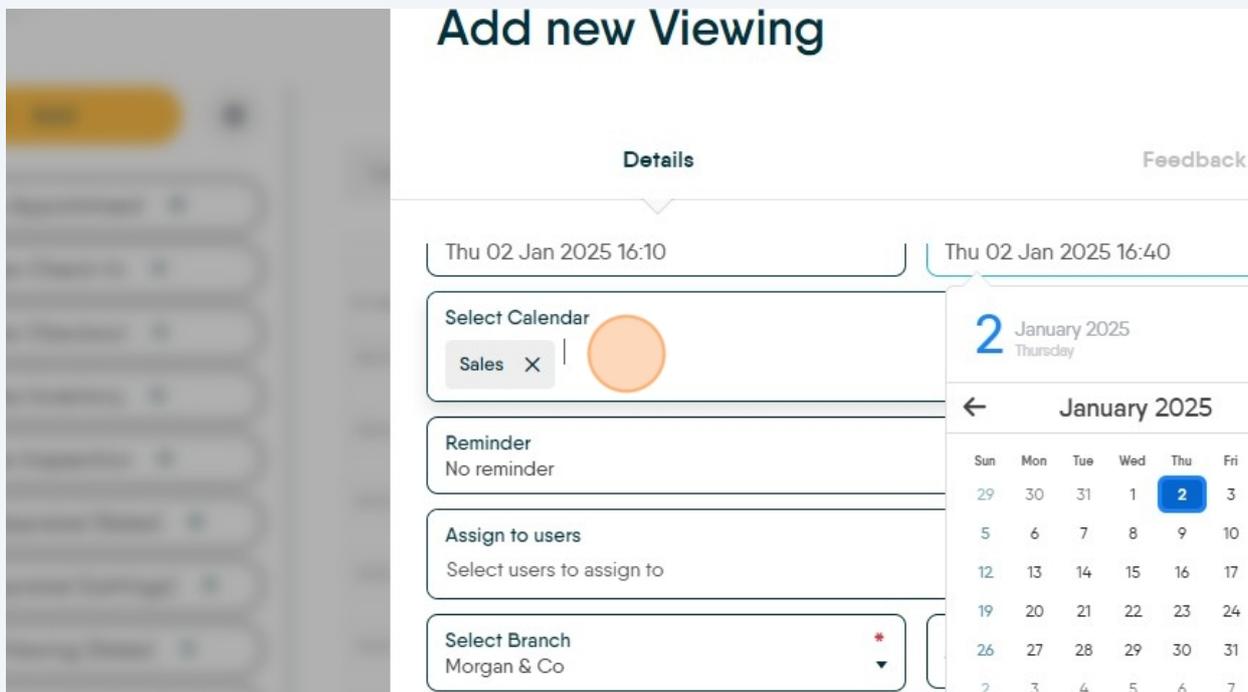---

Assign to users
Select users to assign to

Brooke Morgan

David-George Morgan

Ian Johnson

James Morgan

Training Dave

VTUK USER

Key No   Access Code
56

Cancel

19 Click "Save Viewing" to finish.

Access Code

Cancel   Save Viewing

20 The viewing will then show in the Calendar. If the viewing has not been confirmed it will show in red. Click here to open the appointment.

Applicant Mobile:
Confirmed: No
Cancelled: No
Event Type: Viewing
Event Time: 10:45 – 11:15

Description: Accompanied Viewings Only

Appraisal Slot

Viewing – 1 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX

21 To confirm a Viewing appointment. Open the viewing appointment and click here. A viewing can also be confirmed from the Property or the Applicant records.
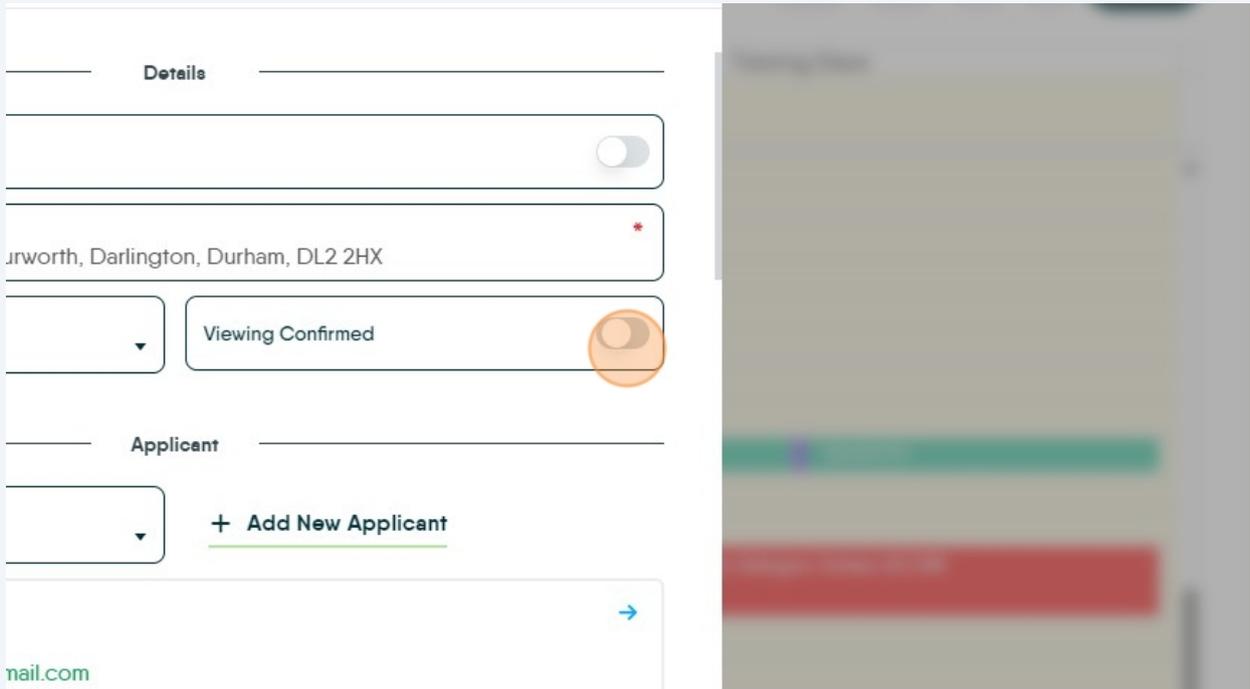
22 You can send your applicant an email from here to confirm the viewing. Click "Send Email"
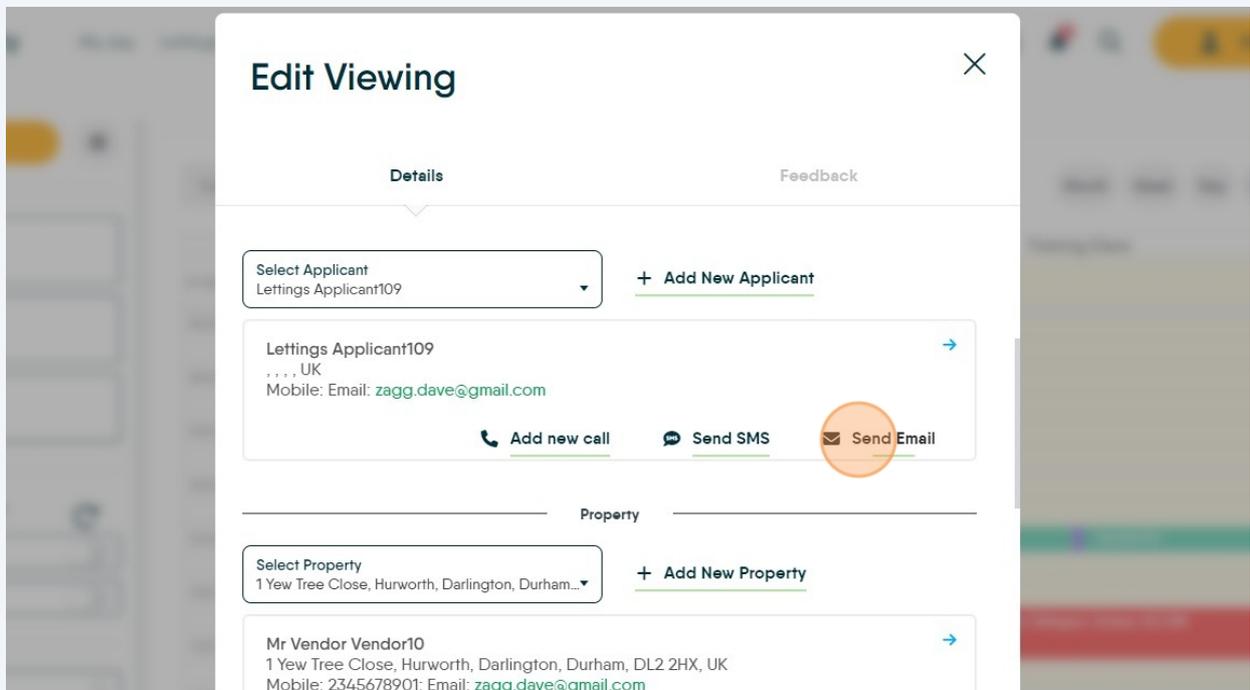
23 Using a message template allows an email to be quickly sent with all the details of the Property, directions as well as the details for the appointment. Click here. Click "Viewing Confirmation Lettings"
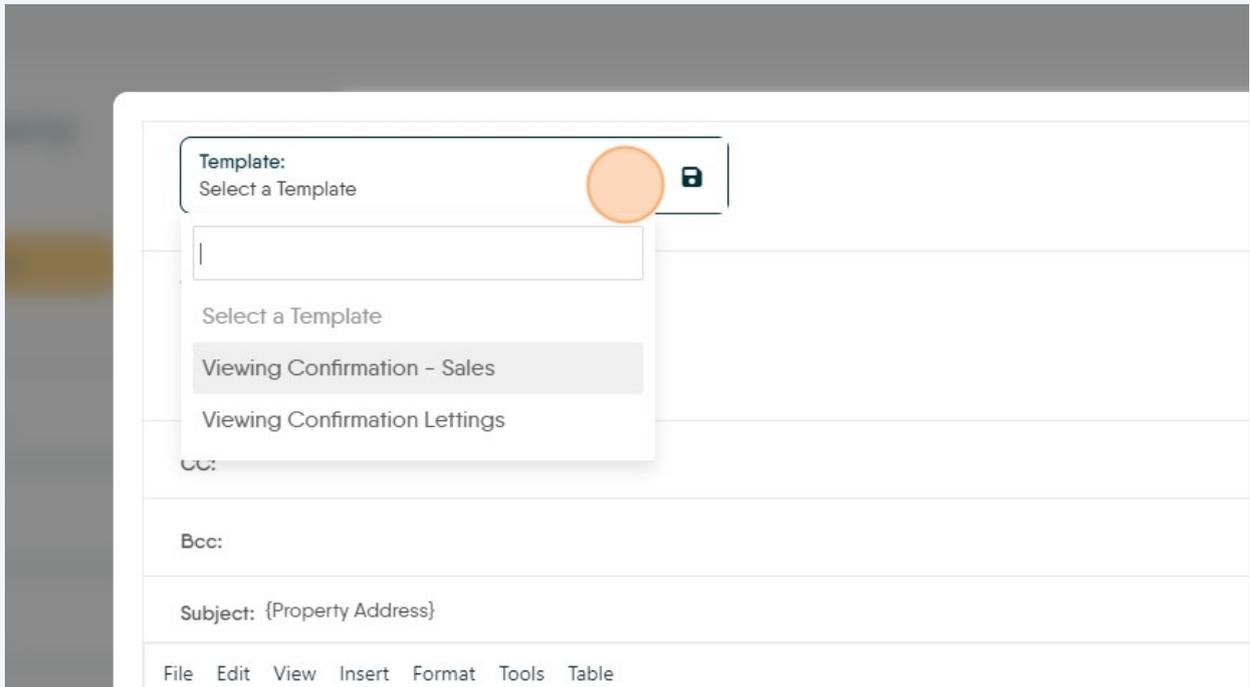
24 The template will show on the screen with the template tags visible e.g. {App. Title} {App. Forename} {App. Surname}... You can confirm what is being sent by clicking on the eye icon this will show you a completed email for the first recipient (if more than one).
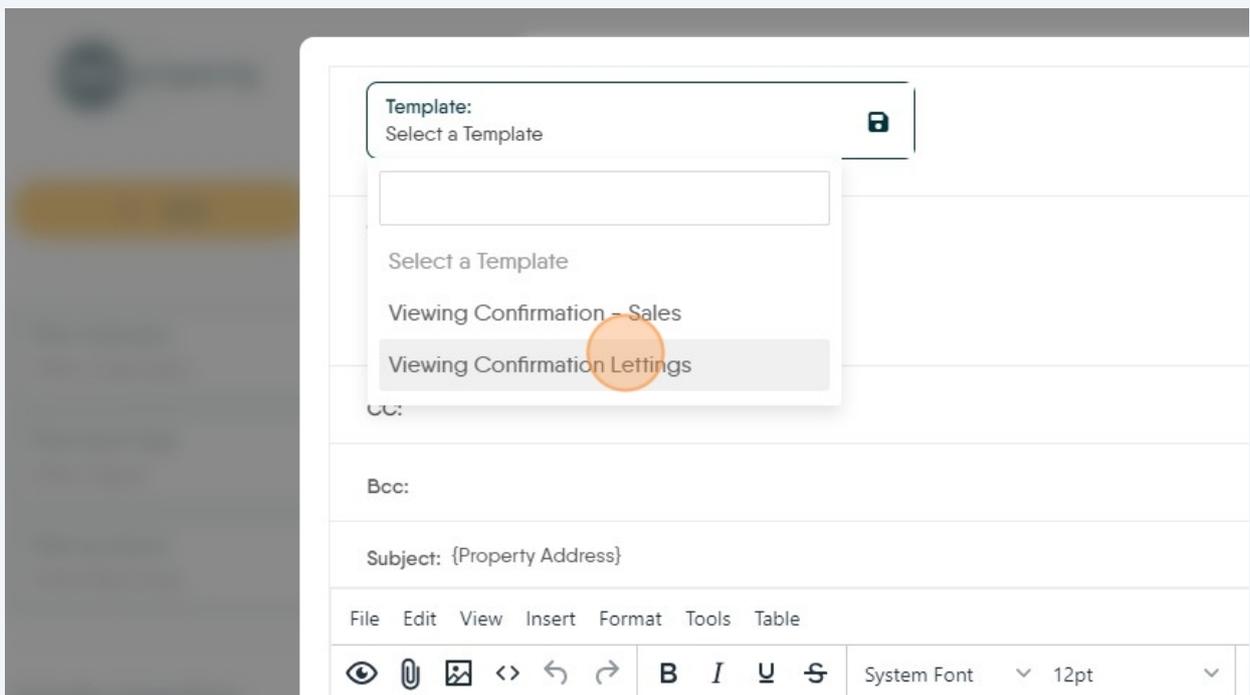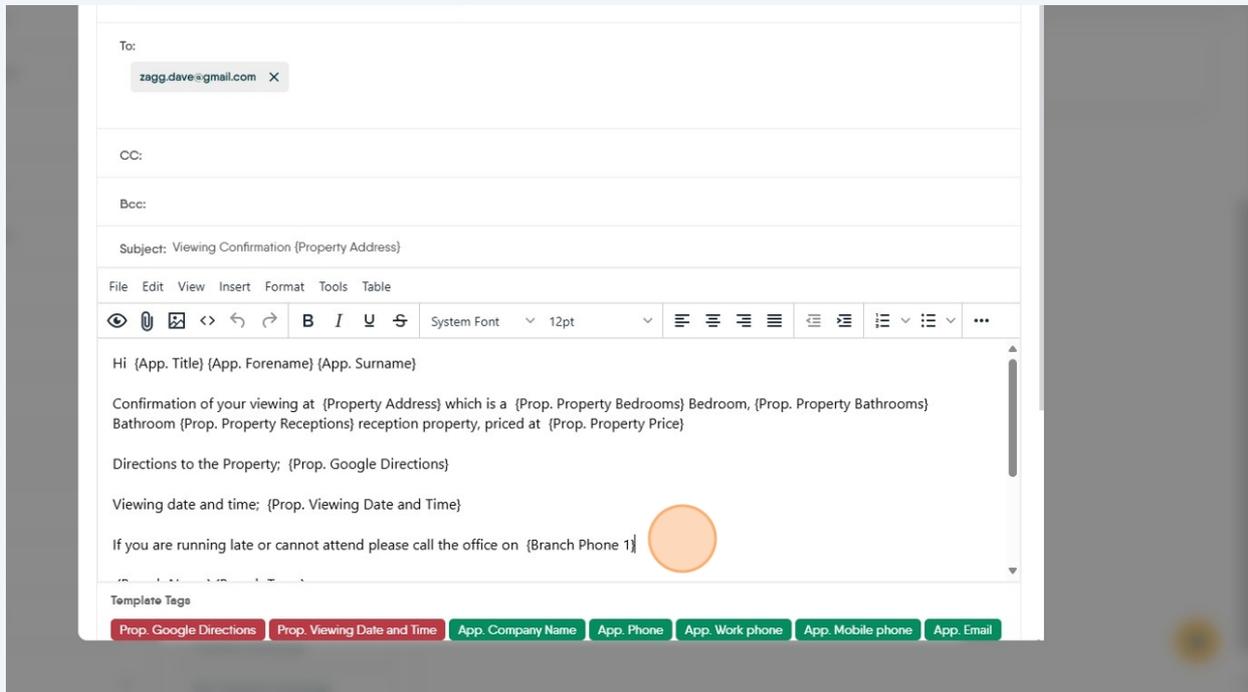

25 The available template tags are at the bottom of the screen. Click "Send Email"
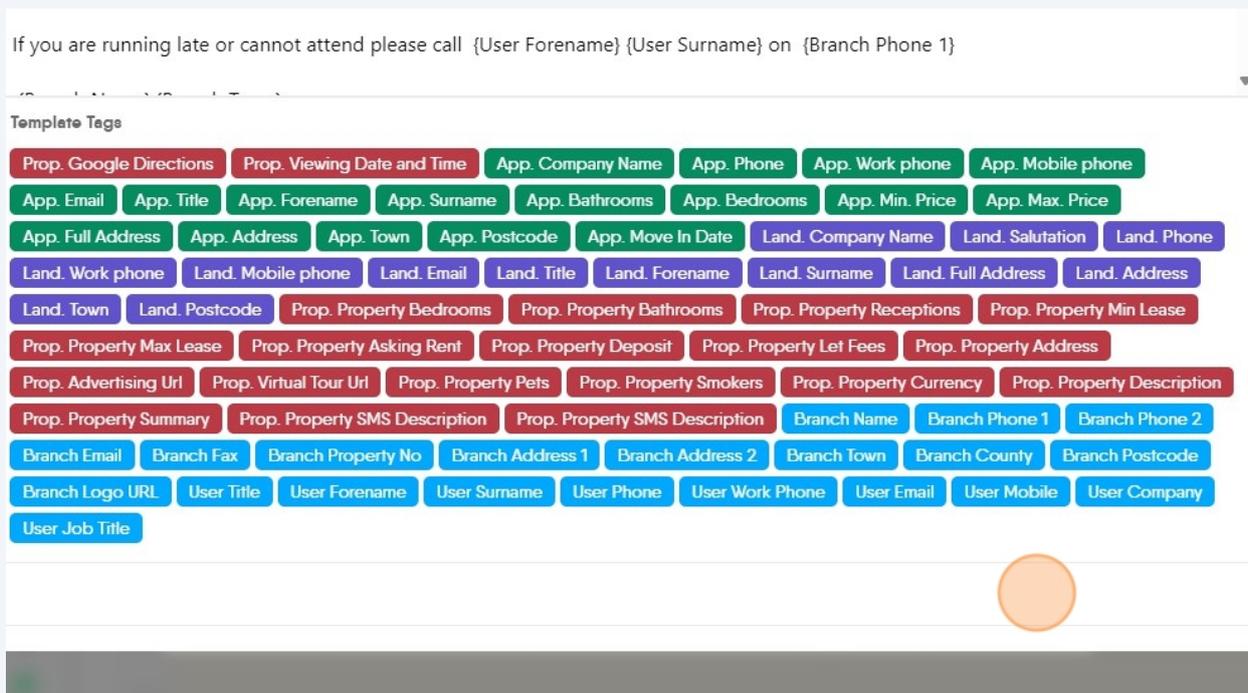
26 An email confirming the appointment can also be sent to the Landlord and Tenants if required. Click "Send Email"

27 Click "Select a Template" to use a message template select the template and then select the details for the contact the email is being sent to. Then click "Send"

Template:
Select a Template

Select a Template

Landlord Viewing – Agent
Conducting

CC:

Bcc:

Subject: {Property Address}

File   Edit   View   Insert   Format   Tools   Table

Prop. Property Let Fees   Prop. Property Address   Prop. Advertising Url   Prop. Virtual Tour
Prop. Property Pets   Prop. Property Smokers   Prop. Property Currency   Prop. Property D
Prop. Property Summary   Prop. Property SMS Description   Prop. Property SMS Description
Branch Phone 1   Branch Phone 2   Branch Email   Branch Fax   Branch Property No   B
Branch Address 2   Branch Town   Branch County   Branch Postcode   Branch Logo URL
User Forename   User Surname   User Phone   User Work Phone   User Email   User Mob
User Company   User Job Title

Send Email ➤

Select Contacts

TT   Test Test Vendor
       Landlord

Prop. Property Let Fees | Prop. Property Address | Prop. Advertising Url | Prop. Virtual Tour Url
Prop. Property Pets | Prop. Property Smokers | Prop. Property Currency | Prop. Property Description
Prop. Property Summary | Prop. Property SMS Description | Prop. Property SMS Description | Branch Name
Branch Phone 1 | Branch Phone 2 | Branch Email | Branch Fax | Branch Property No | Branch Address 1
Branch Address 2 | Branch Town | Branch County | Branch Postcode | Branch Logo URL | User Title
User Forename | User Surname | User Phone | User Work Phone | User Email | User Mobile
User Company | User Job Title

Send Email ➤

Select Contacts

TT Test Test Vendor
Landlord

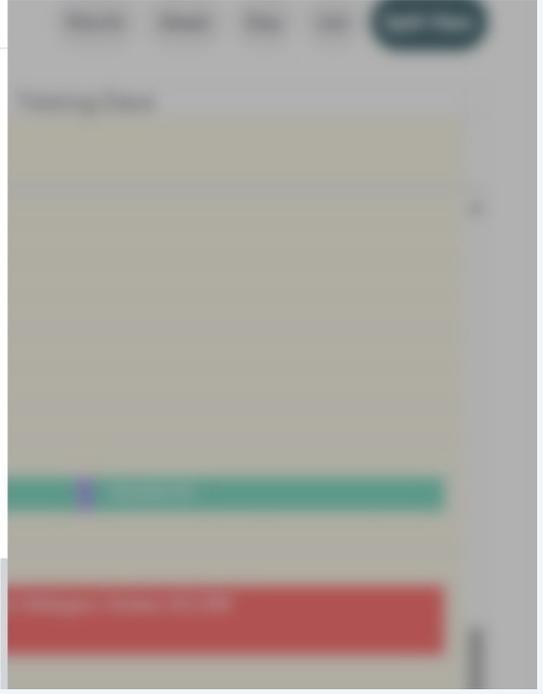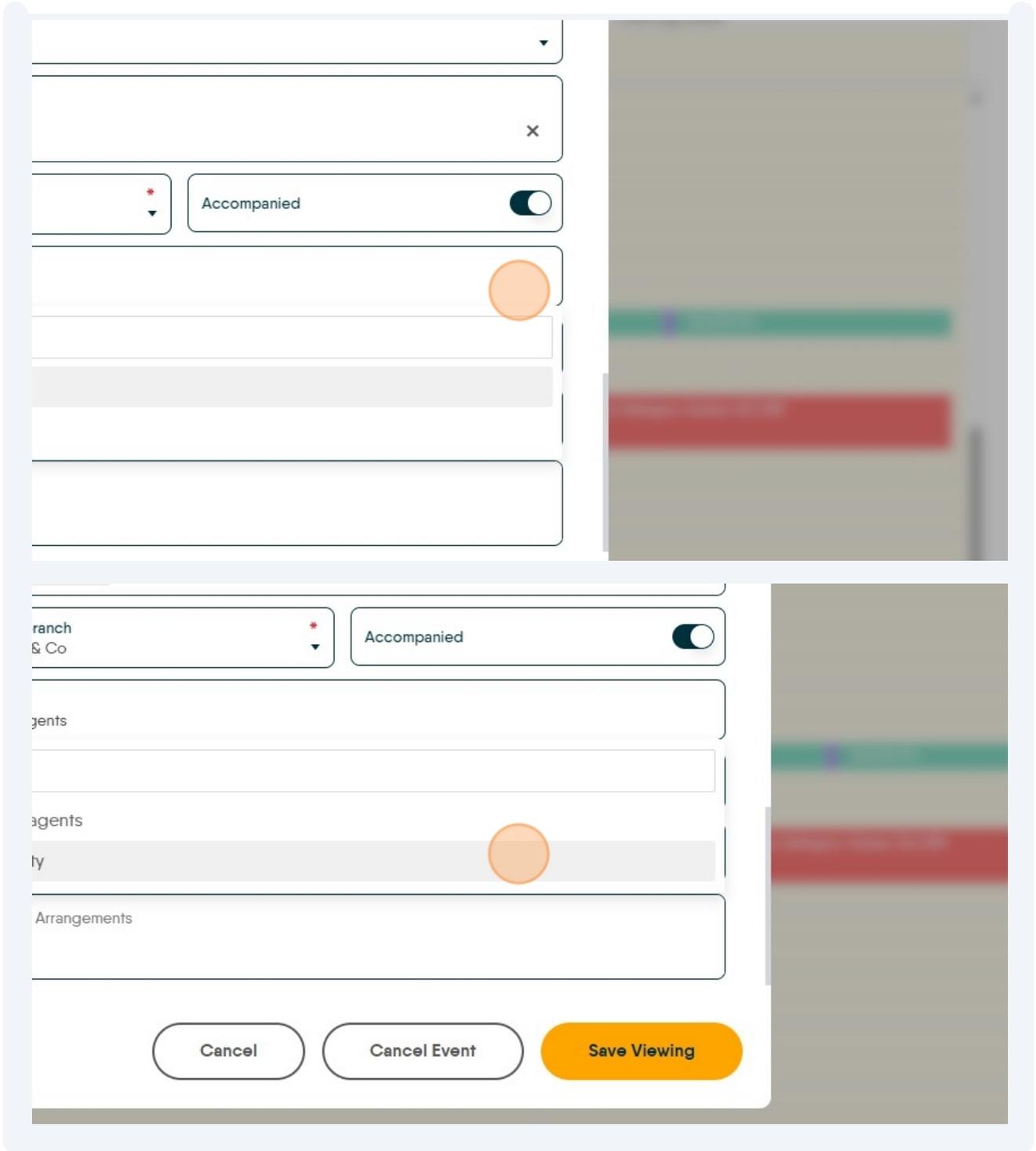**28** If the appointment is Accompanied Click here, select where you are meeting the Viewer.

Feedback

Accompanied

Access Code
9563122

Accompanied

ranch
& Co

Accompanied

gents

agents
ty

Arrangements

Cancel   Cancel Event   Save Viewing

29 If keys are held they will show here. Click here.

Select Branch
Morgan & Co *

Accompanied ⬤

Meet At
Property

Keys Held ○

Key No
1DL2

Access Code
9563122

Viewing Arrangements

Cancel   Cancel Event   **Save Viewing**

30 Click "Save Viewing" to close and save the viewing.

Accompanied

Access Code
9563122

ncel   Cancel Event   Save Viewing

31 Once confirmed the viewing will show in the colour selected for the employees conducting the viewing and will show a tick. This will be updated in all the locations a Viewing appointment will be displayed (Calendar, Applicant and Property records)