

Creating a New Sales or Lettings Viewing Appointment in CRM



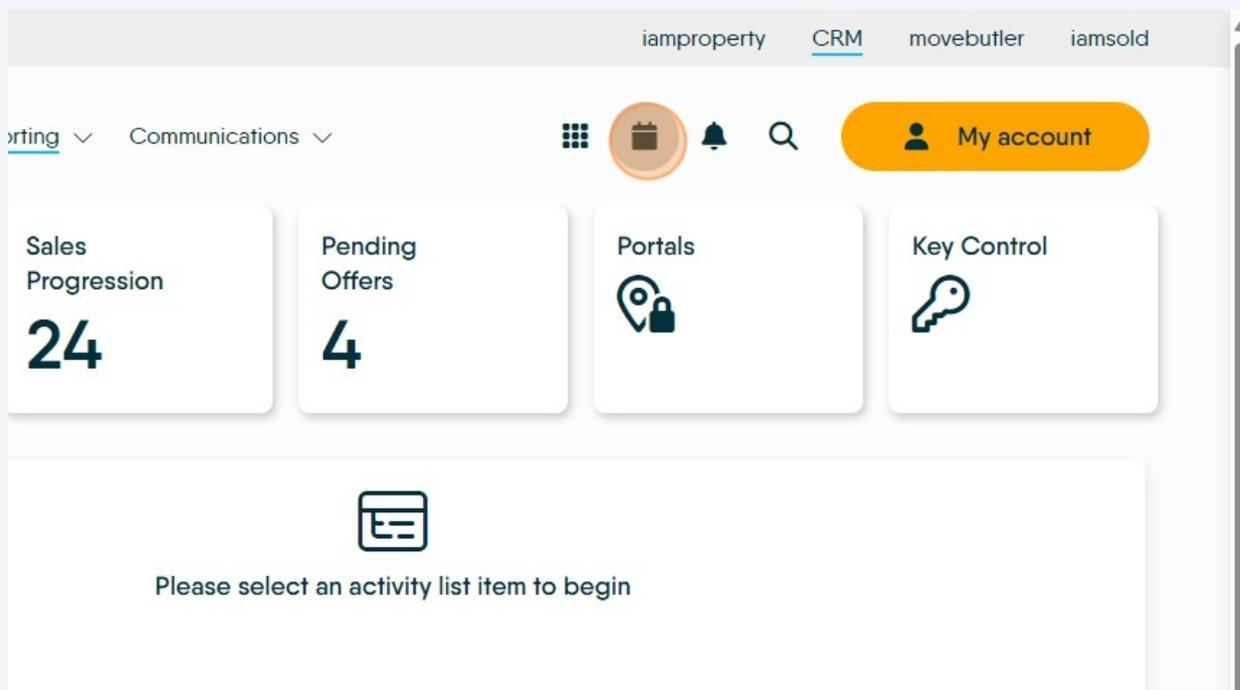
This guide offers a comprehensive step-by-step process for creating and managing sales and letting viewing appointments in the CRM system, making it essential for real estate professionals.

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"

The screenshot shows the 'iam property' dashboard. At the top, there is a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communication'. On the left side, there is a sidebar with a '+ Add' button highlighted in orange, and three filter sections: 'Filter Calendars', 'Filter Event Type', and 'Filter by branch'. The main area displays a calendar for 'David-George Morgan' on 'Thu 02 Jan 2025'. The calendar grid shows time slots from 'all-day' to '09:00'.

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

The screenshot shows the 'iam property' dashboard. At the top, there is a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communication'. On the left side, there is a sidebar with a '+ Add' button and a dropdown menu. The dropdown menu is open, showing options: 'New Appointment', 'New Check-In', 'New Checkout', 'New Inventory', 'New Inspection', and 'New Appraisal (Sales)'. The 'New Appointment' option is highlighted in orange. The main area displays a calendar for 'David-George Morgan' on 'Thu 02 Jan 2025'. The calendar grid shows time slots from 'all-day' to '09:00'.

Adding a 'New Appointment'



Tip! This type of appointment set in CRM is usually used for personal appointments and is NOT linked to a specific record in CRM.

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 * **End Time** *

Select Branch * ▼

Calendar ?

6 Click the "Add location" field.

The screenshot shows the 'My Event Details' form with the following fields:

- Event title *
- All day?
- Location: Add location (highlighted with an orange circle)
- Start Time *: Thu 02 Jan 2025 16:08
- End Time *: Thu 02 Jan 2025 16:38
- Select Branch *: Morgan & Co
- Calendar ?
- Assign to users ?
 - Training Dave X

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

The screenshot shows the 'My Event Details' form with the 'Start Time' field open to a date picker. The date picker displays the date '2 January 2025 Thursday' and a calendar grid for January 2025. The date '2' is highlighted in blue. The 'Start Time' field now shows 'Thu 02 Jan 2025 16:10'.

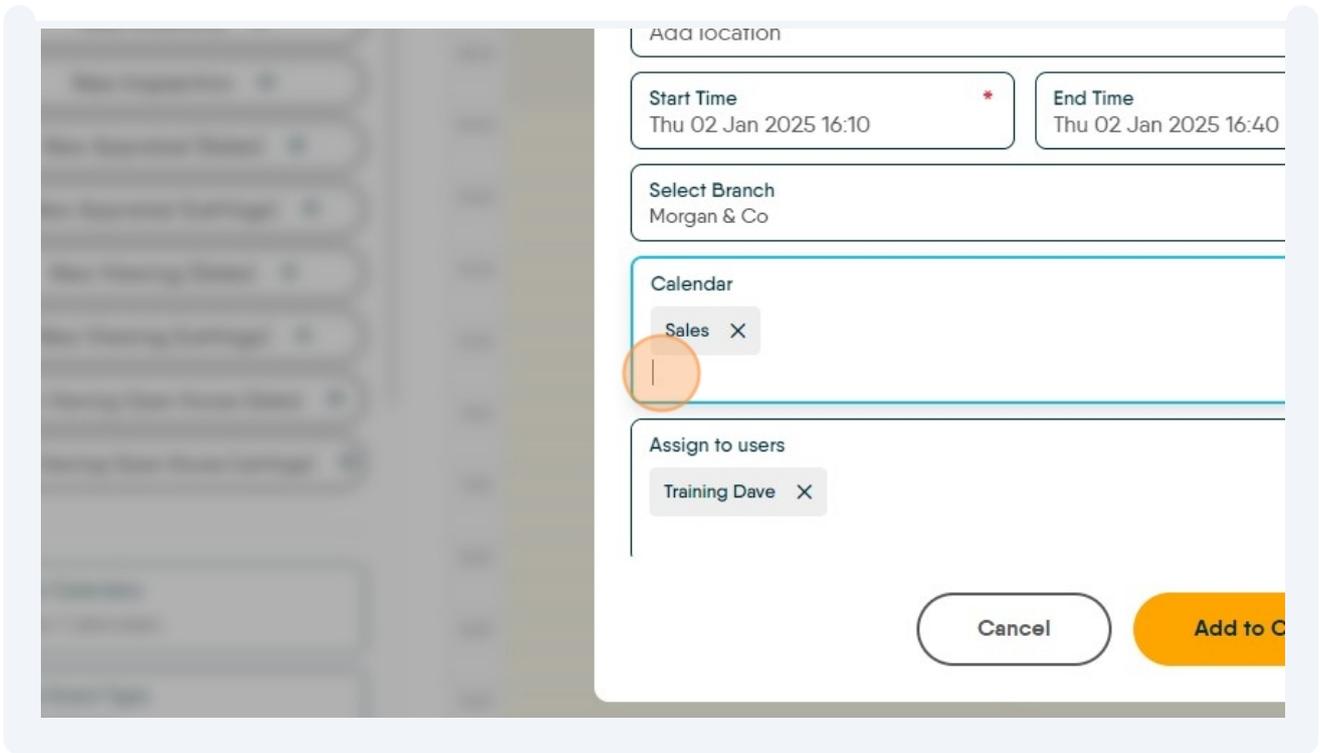
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

8 Click the "End Time" field.

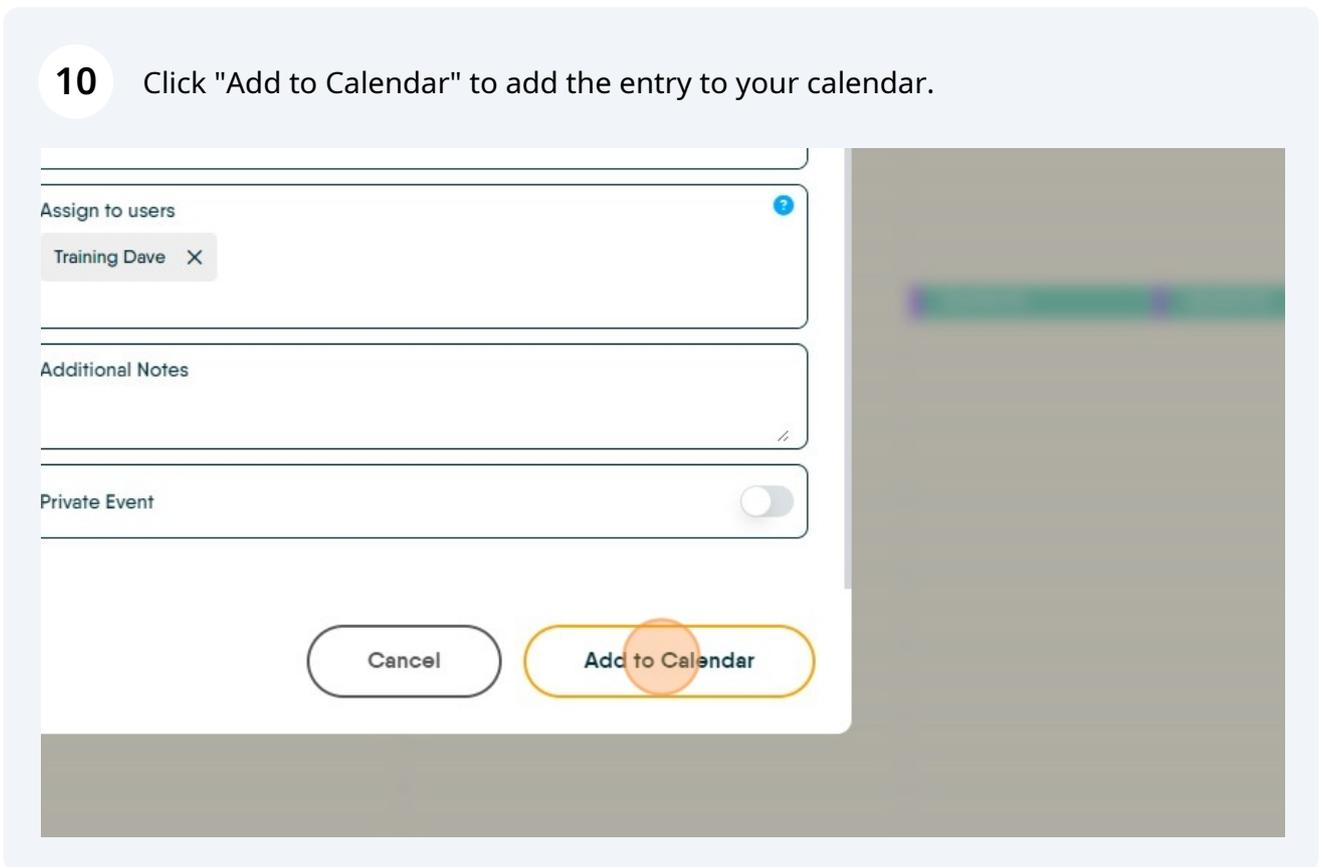
The screenshot shows a mobile application interface for creating an event. The form is titled "My Event Details" and includes a "Reminder / Recurrence" section. The "End Time" field, which contains "Thu 02 Jan 2025 16:38", is highlighted with an orange circle. Other visible fields include "Event title", "All day?", "Location", "Start Time", and a calendar view for January 2025.

9 to select the calendar to add the record to. Click this search field. Click "Sales" or the calendar you are using.

This screenshot shows a dropdown menu for selecting a calendar. The menu is open, displaying several options: "Sales", "Lettings", and "Annual Leave". The "Sales" option is highlighted with a grey background. An orange circle highlights the search field above the list. At the bottom of the form, there are "Cancel" and "Add to Calendar" buttons.



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.

The screenshot displays a software interface for creating appointments. On the left side, there is a vertical list of buttons, each with a plus sign, representing different appointment types. The 'New Viewing (Sales)' button is highlighted with a red circle. Below this list is a 'Filter Calendars' input field. On the right side, there is a calendar grid with a vertical time axis on the left. The time slots are labeled from 08:00 to 12:00 in 30-minute increments. The top row is labeled 'all-day'. The grid cells are currently empty, indicating no appointments are scheduled.

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.

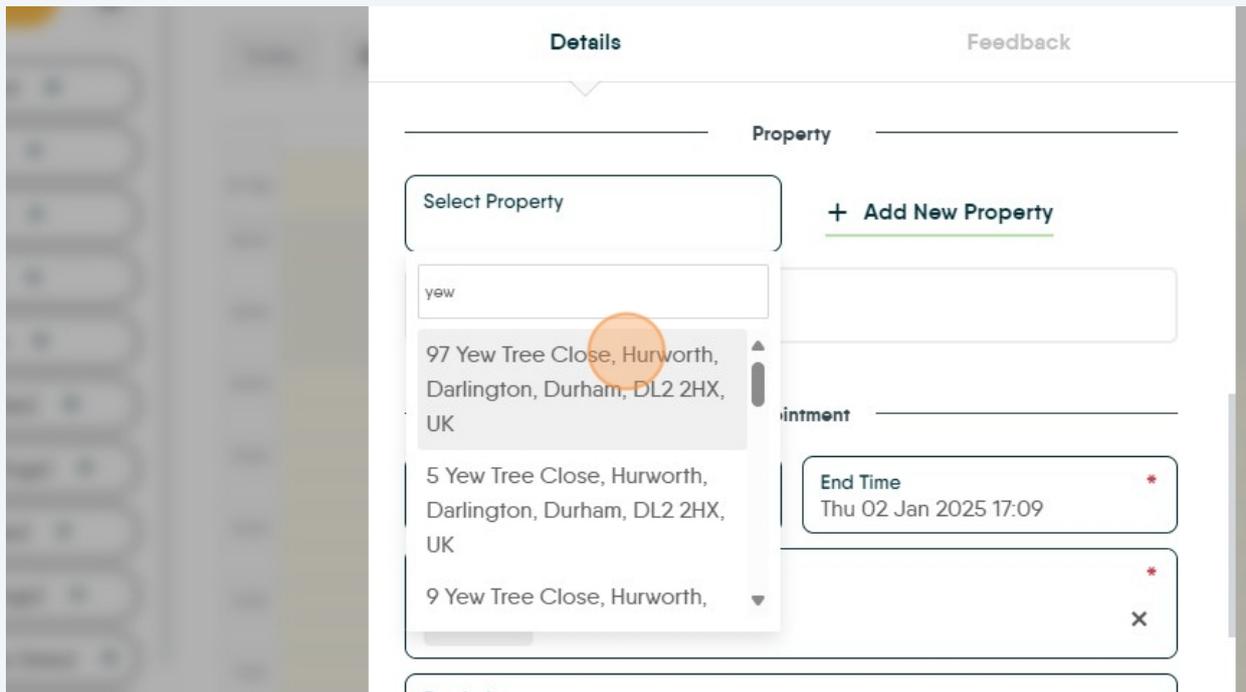
The screenshot shows a form titled 'Add new Viewing'. The 'Event title' field contains 'Viewing'. The 'Status' dropdown is set to 'Booked'. A 'Viewing Confirmed' toggle switch is turned on. Below these is the 'Applicant' section, which includes a 'Select Applicant' dropdown with an orange circle icon, a search input field, and a '+ Add New Applicant' link. A tooltip below the search field reads 'Please enter 3 or more characters'. At the bottom of the form are 'Cancel' and 'Save Viewing' buttons.

13

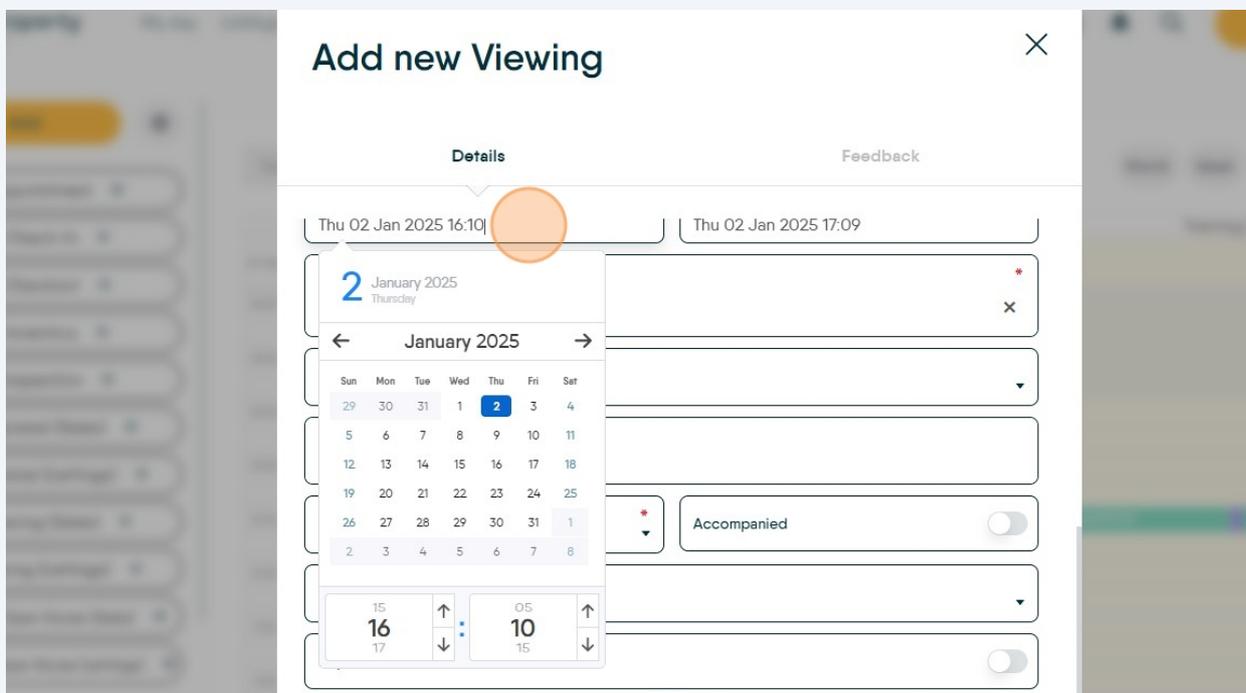
Click here and search for the property. You can add a new property from here as well.

The screenshot shows the 'Add new Viewing' form with the 'Details' tab selected. The 'Property' section is highlighted, featuring a 'Select Property' dropdown with an orange circle icon, a search input field, and a '+ Add New Property' link. A tooltip below the search field reads 'Please enter 3 or more characters'. Below the property section are 'Start Time' and 'End Time' fields, both containing 'Thu 02 Jan 2025 16:09' and '17:09' respectively. A close button (X) is visible in the top right corner.

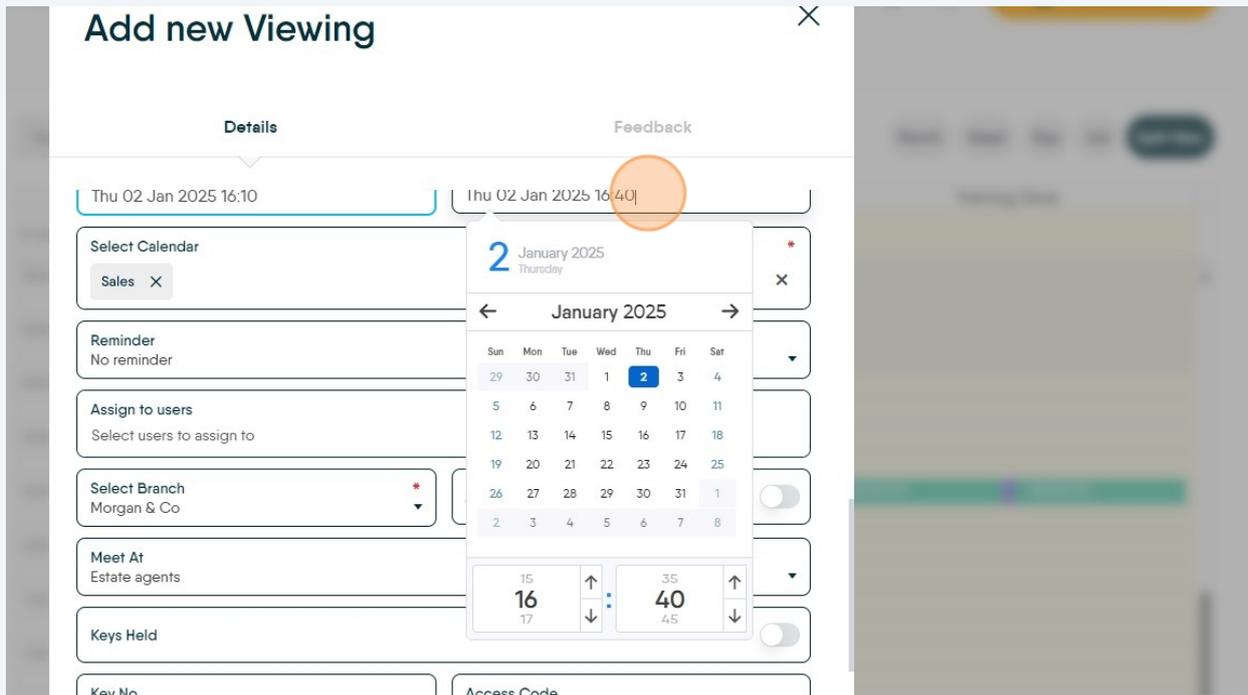
14 Click the property name you want to use.



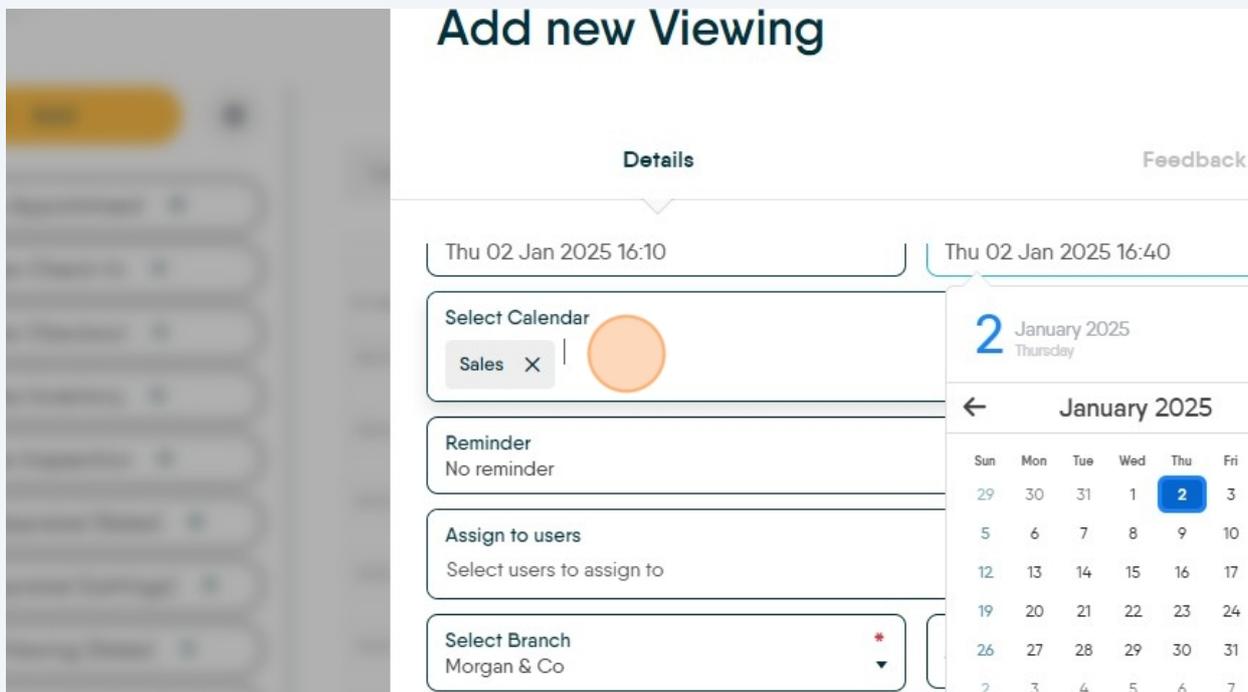
15 Click here and select the start date and time for the viewing.



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





Add new Viewing

Details

Feed

Thu 02 Jan 2025 16:10

Thu 02 Jan 2025 16:40

Select Calendar

Select calendar to assign to

Annual Leave

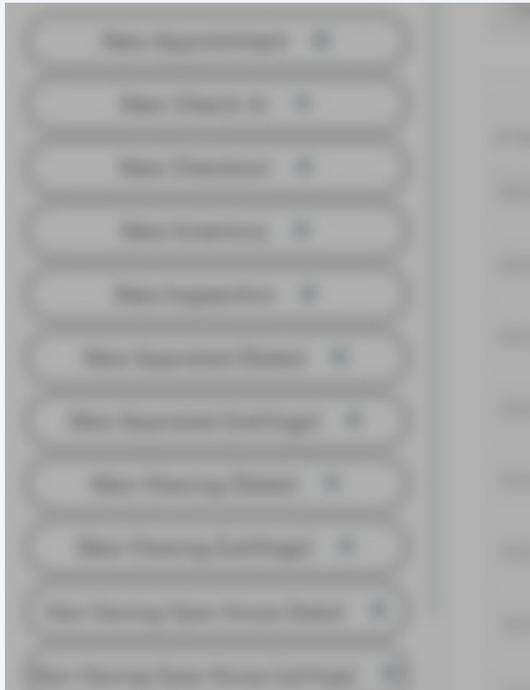
Lettings

Sales

Select Branch

Morgan & Co

Accompanied



Thu 02 Jan 2025 16:10

Thu 02 Jan 2025

Select Calendar

Select calendar to assign to

Annual Leave

Lettings

Sales

Select Branch

Morgan & Co

Accompanied

Meet At

Estate agents

Keys Held

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 X

Reminder

No reminder

Assign to users

Select users to assign to

Brooke Morgan

David-George Morgan

Ian Johnson

James Morgan

Training Dave

VTIK USER

Assign to users

Select users to assign to

Brooke Morgan

David-George Morgan

Ian Johnson

James Morgan

Training Dave

VTIK USER

key no
56

Access Code

Cancel

19 Click "Save Viewing" to finish.

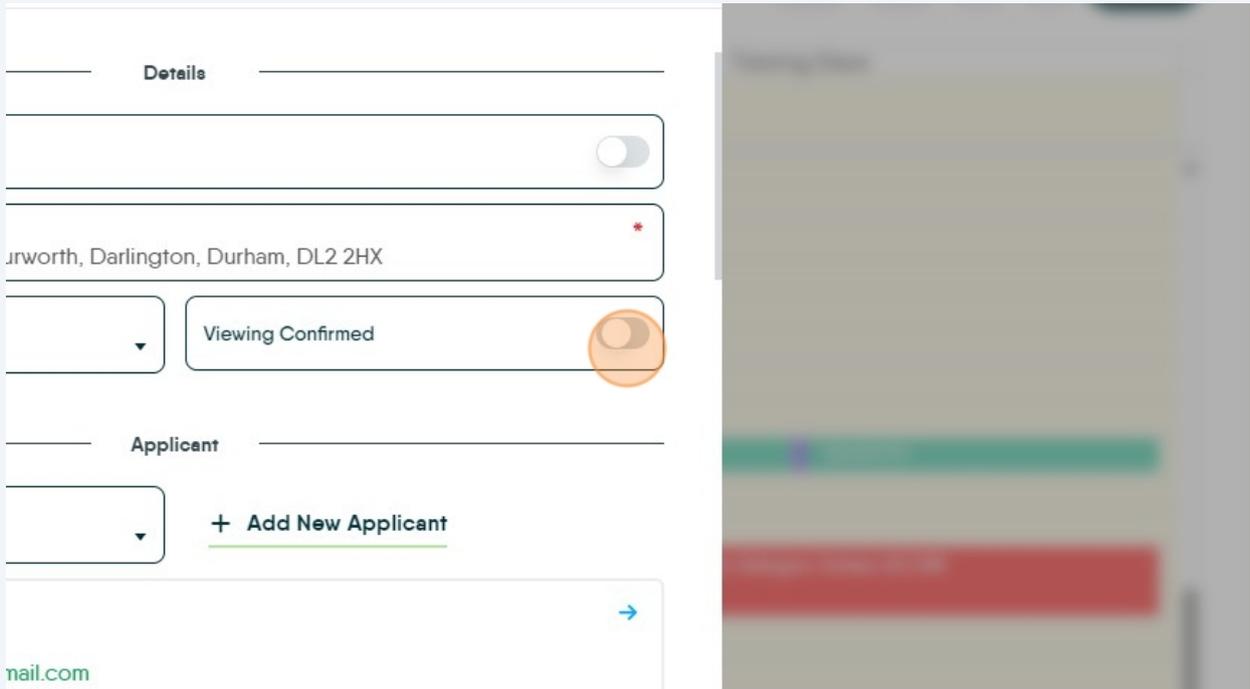
A screenshot of a web form for saving a viewing. The form includes a dropdown menu, a toggle switch, an 'Access Code' input field, and two buttons: 'Cancel' and 'Save Viewing'. The 'Save Viewing' button is highlighted with an orange circle. The form is overlaid on a blurred background of a calendar or map.

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.

A screenshot of a calendar interface. A red appointment bar is visible, labeled 'Viewing - 1 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX'. A tooltip is displayed over the appointment, providing details: Applicant Mobile, Confirmed: No, Cancelled: No, Event Type: Viewing, Event Time: 10:45 - 11:15, and Description: Accompanied Viewings Only. An orange circle highlights the appointment bar.

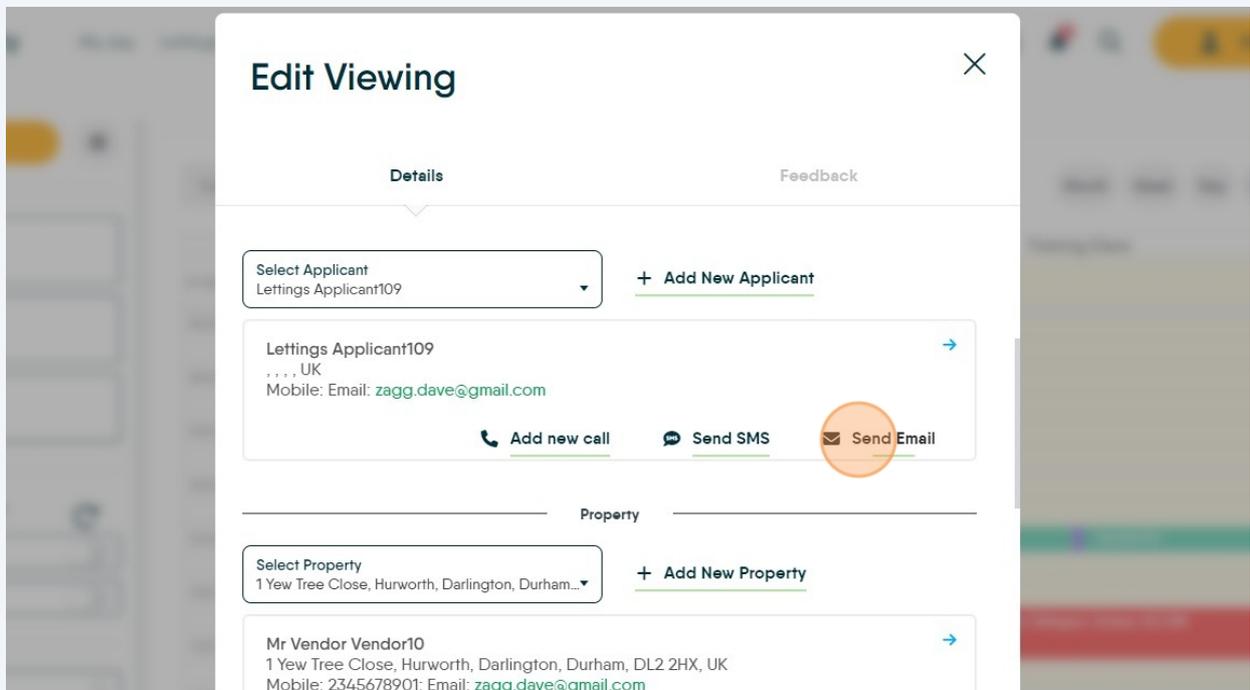
21

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.



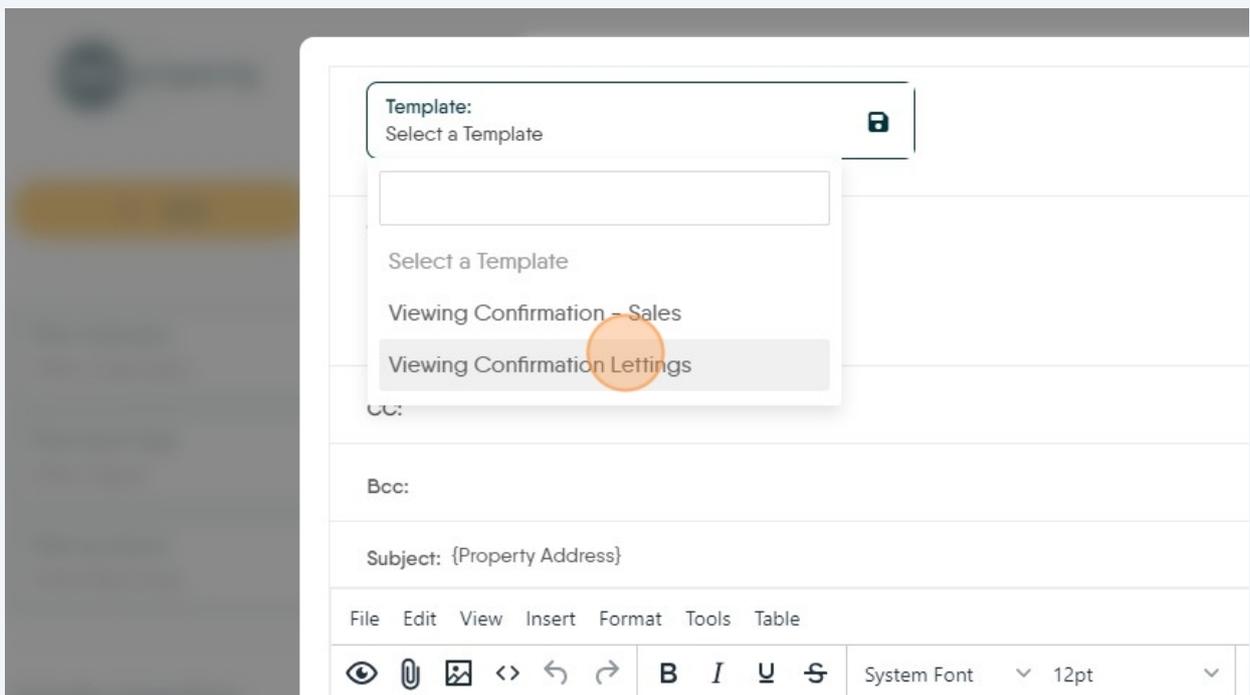
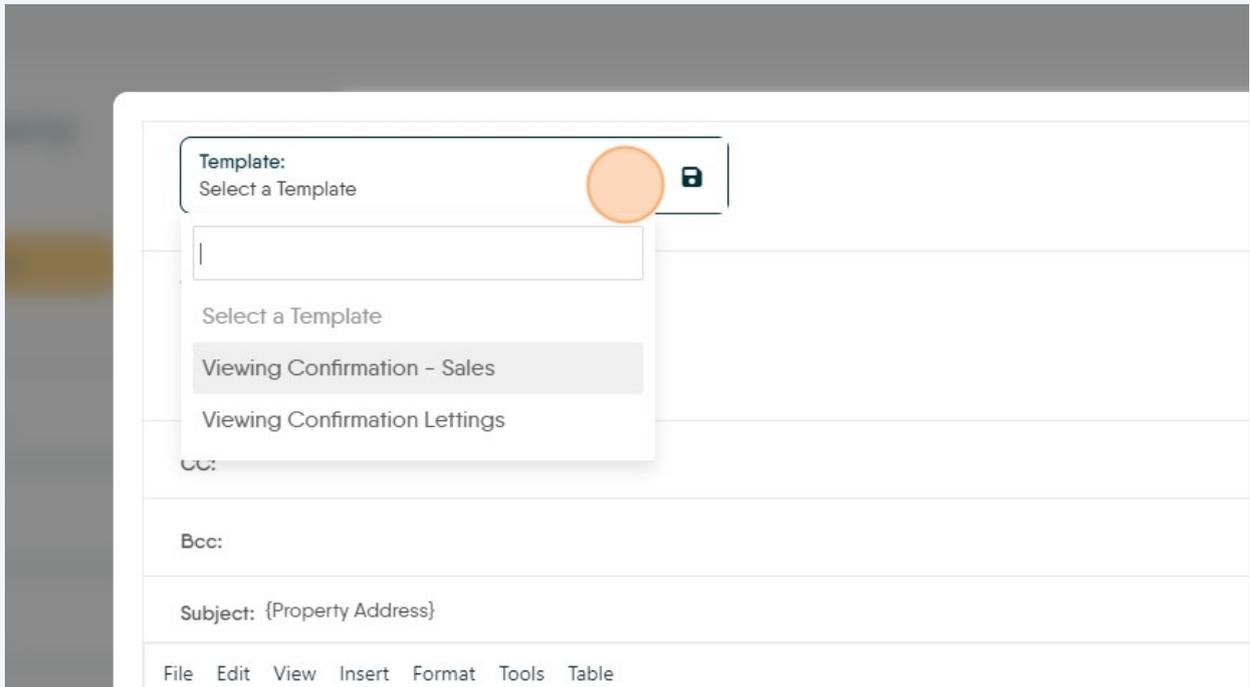
22

You can send your applicant an email from here to confirm the viewing. Click "Send Email"



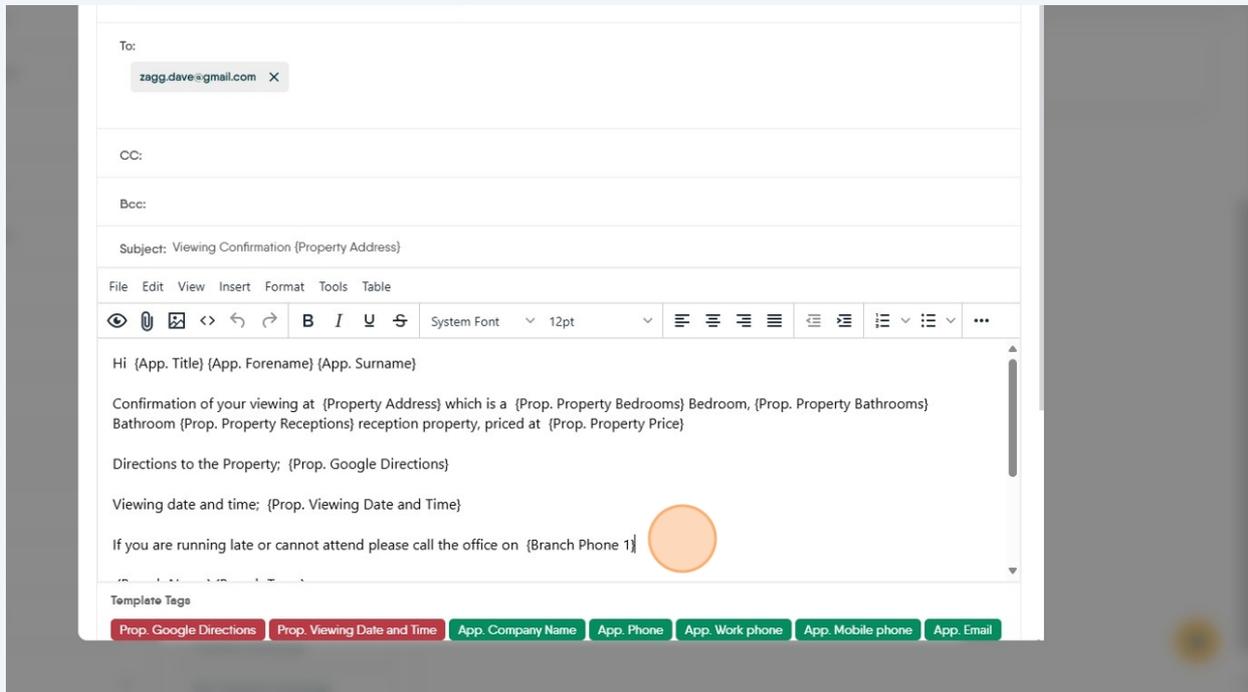
23

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"



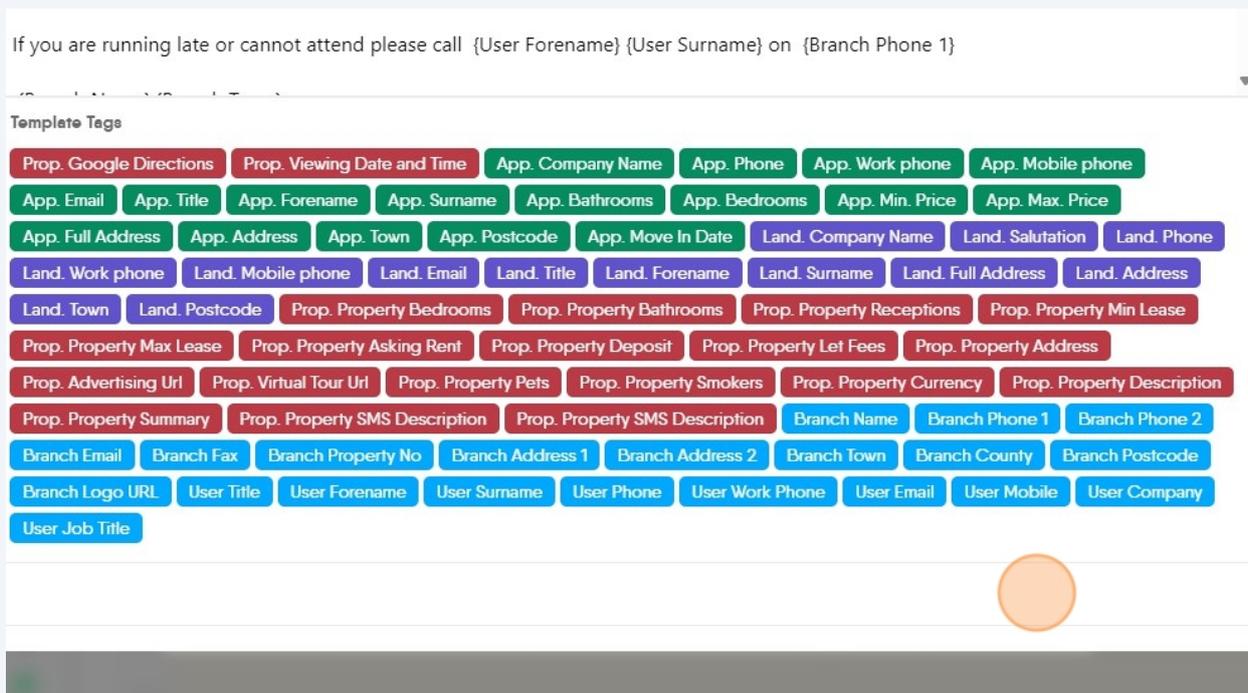
24

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"

The screenshot shows a software interface with two main sections: 'Property' and 'Appointment'.
Under the 'Property' section, there is a dropdown menu for 'Select Property' with the text '1 Yew Tree Close, Hurworth, Darlington, Durham...'. To its right is a '+ Add New Property' button. Below this is a contact card for 'Mr Vendor Vendor10' with the address '1 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX, UK', mobile number '2345678901', and email 'zagg.dave@gmail.com'. At the bottom of the contact card are four buttons: 'Add new call', 'Send SMS', 'Send Email' (highlighted with an orange circle), and 'Contact Tenants'.
Under the 'Appointment' section, there are two input fields for 'Start Time' (Fri 17 Jan 2025 10:45) and 'End Time' (Fri 17 Jan 2025 11:15). Below these is a 'Select Calendar' dropdown menu with 'Lettings' selected.

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"

The screenshot shows an email composition window. At the top, there is a 'Template:' dropdown menu with the text 'Select a Template' and a lock icon. Below this are fields for 'To:', 'CC:', and 'Bcc:'. The 'To:' field contains the email address 'zagg.dave@gmail.com'. The 'Subject:' field contains the placeholder text '{Property Address}'. At the bottom of the window is a menu bar with the items 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', and 'Table'.

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
- 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

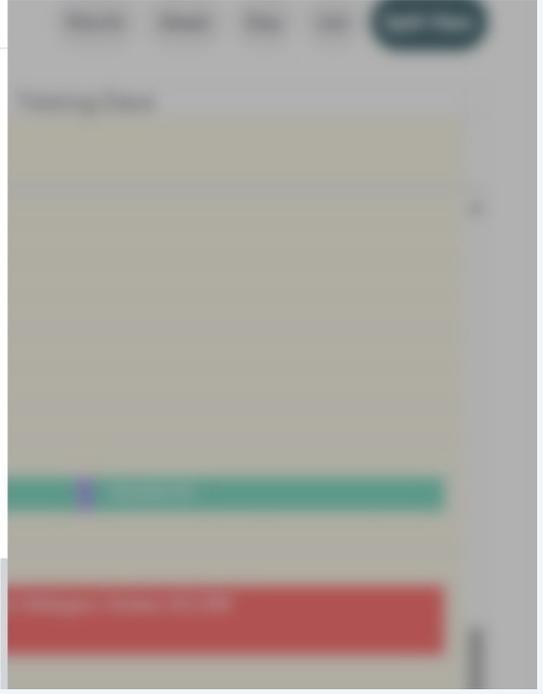
If the appointment is Accompanied Click here, select where you are meeting the Viewer.

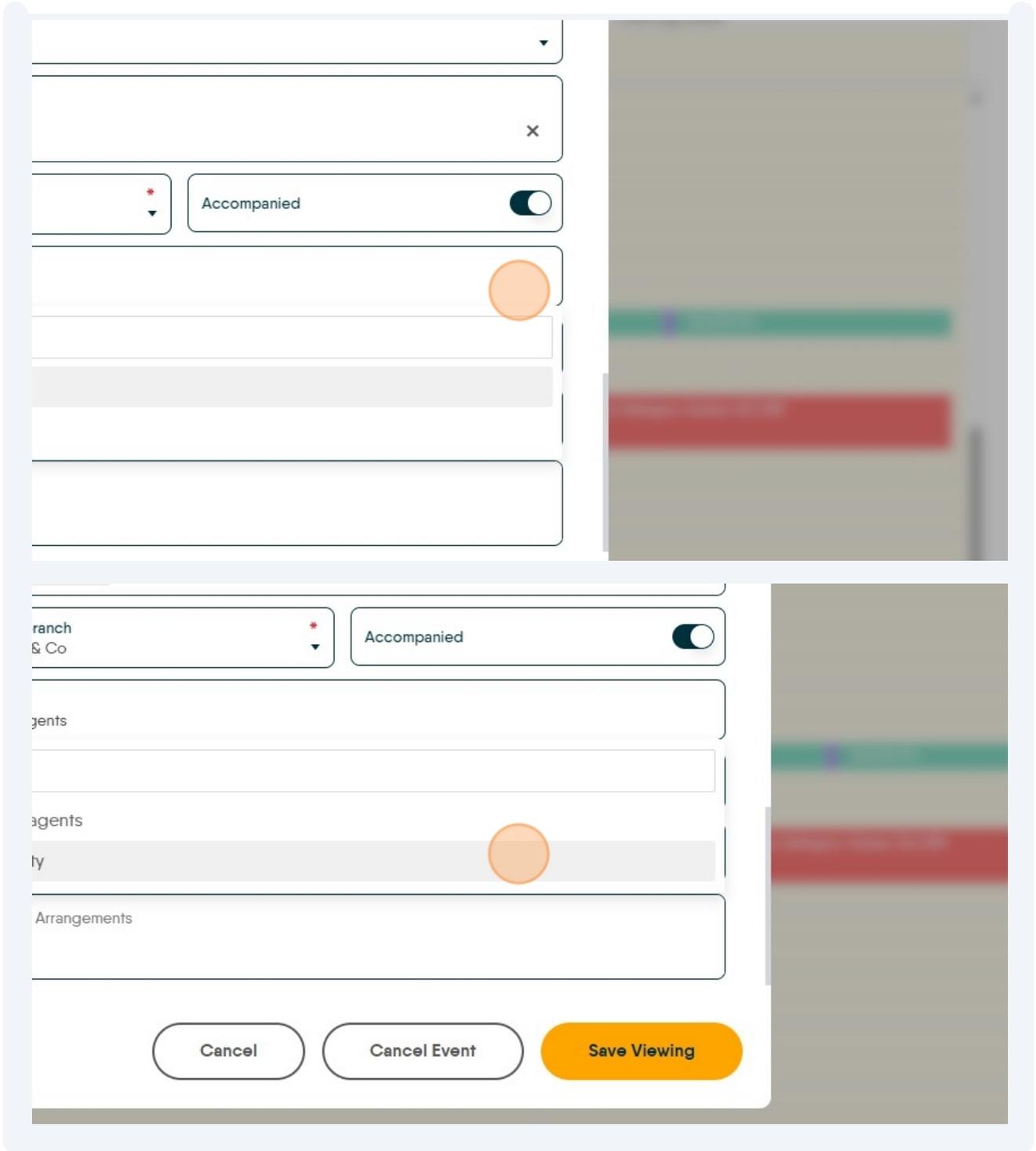
Feedback

*

Accompanied

Access Code
9563122





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

Cancel 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)

The screenshot displays a calendar grid with a yellow background. A green bar represents a viewing appointment, labeled "Viewing - 1 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX". A white pop-up window is overlaid on the appointment, providing details: "Applicant Mobile:", "Confirmed: Yes", "Cancelled: No", "Event Type: Viewing", "Event Time: 10:45 - 11:15", and "Description: Accompanied Viewings Only". A small orange circle highlights a checkmark icon on the left side of the appointment bar. Above the appointment bar, a purple bar is labeled "Appraisal Slot".