

Leaving Viewing Feedback in CRM



This guide provides step-by-step instructions for leaving Private and Public feedback on Viewings in the CRM, ensuring your comments remain confidential while effectively tracking viewer interactions. This guide will look at all options for viewing and updating feedback.

By following these detailed steps, users can streamline their feedback process, improve communication with clients, and maintain organised records.



The process for leaving Private and Public feedback is essentially the same, a different field is selected and filled in.

Private Feedback is only visible to CRM users logged into the correct branch etc on CRM.

Public Feedback is available for anyone with access to the property details to view. A Landlord or Vendor with access to the respective client portals will be able to view any Public Feedback, as well as CRM users logged into your company and branch.

Adding Feedback via Lettings/Sales Activity Dashboard

1

Through this guide we will use the Sales feedback screens. The process for Lettings is identical.

2 Navigate to <https://crm.iamproperty.com/Dashboards/Sales>

From the Activity List, select the Viewings Requiring Feedback option. This will show all the Sales or Lettings viewings that have not had viewing feedback added or been saved with final viewing notes.

The screenshot shows the CRM dashboard with a sidebar on the left containing the 'Activity List'. The 'Viewings Requiring Feedback' option is highlighted with an orange circle. The main area on the right displays a list of viewings, with a dropdown menu open for the first row, showing options like 'Add Call (Applicant)', 'Log Call (Applicant)', and 'Add Call (Vendor)'.

Activity	Count
Property Checklist	3
Sales Progression	28
Tasks Today/Overdue	7
Tenure Expiring	1
Vendor Checklist	2
Vendors Not Contacted	34
Viewings Requiring Feedback	24
Unconfirmed Viewings	20
Pending Offers	6

Checkbox	Name	Status
<input type="checkbox"/>	Training Dave	sale
<input type="checkbox"/>	Training Dave	sale
<input type="checkbox"/>	Training Dave	sale
<input type="checkbox"/>	Training Dave	Sal
<input type="checkbox"/>	Training Dave	Sal
<input type="checkbox"/>	Training Dave	Sal
<input type="checkbox"/>	Training Dave, Brooke Morgan	Sal
<input type="checkbox"/>	Training Dave	Sal
<input type="checkbox"/>	James Morgan	Sal

3 Click the 3 dots next to the record you want to open.

The screenshot shows the CRM dashboard with the 'Viewings Requiring Feedback' list. The dropdown menu for the first row is open, showing options like 'Add Call (Applicant)', 'Log Call (Applicant)', and 'Add Call (Vendor)'. The list includes columns for 'Negotiator', 'Applicant', and 'Property'.

Negotiator	Applicant	Property
Training Dave	salesletti applicant	20 Blackthorn Drive, Hurworth
Training Dave	salesletti applicant	15 Yew Tree Close, Hurworth,
Training Dave	salesletti applicant	112 Yew Tree Close, Hurworth,
Training Dave	Sales Applicant11	2 Yew Tree Close, Hurworth, t
Training Dave	Sales Applicant11	98 Yew Tree Close, Hurworth,
Training Dave	Sales Applicant11	831 Pelaw Crescent, Chester
Training Dave	Sales Applicant11	97 Yew Tree Close, Hurworth,
Training Dave, Brooke Morgan	Sales Applicant11	97 Yew Tree Close, Hurworth,
Training Dave	Sales Applicant11	5 Yew Tree Close, Hurworth, t
James Morgan	Sales Applicant11	5 Yew Tree Close, Hurworth, t

4

From the menu click "Open Viewing" this will open the Viewing record for the record you selected.

The screenshot shows a sidebar menu on the left with various task categories and their counts. The main area displays a table of viewing records. A context menu is open over the table, with the 'Open Viewing' option highlighted by an orange circle.

	<input type="checkbox"/> Negotiator	Applicant	Property
⋮	<input type="checkbox"/> Training Dave	salesletti applicant	20 Blackthorn Drive, Hurworth
⋮	<input type="checkbox"/> Training Dave	salesletti applicant	15 Yew Tree Close, Hurworth,
⋮	<input type="checkbox"/> Training Dave	salesletti applicant	112 Yew Tree Close, Hurworth,
⋮	<input type="checkbox"/> Training Dave	Sales Applicant11	2 Yew Tree Close, Hurworth, t
⋮	<input type="checkbox"/> Training Dave	Sales Applicant11	98 Yew Tree Close, Hurworth,
		Sales Applicant11	831 Pelaw Crescent, Chester
		Sales Applicant11	97 Yew Tree Close, Hurworth,
		Sales Applicant11	97 Yew Tree Close, Hurworth,
		Sales Applicant11	5 Yew Tree Close, Hurworth, t
		Sales Applicant11	5 Yew Tree Close, Hurworth, t

Context Menu Options:

- Add Call (Applicant)
- Log Call (Applicant)
- Add Call (Vendor)
- Log Call (Vendor)
- Open Viewing**
- Send Email (Vendor)
- Send SMS (Vendor)
- Add Journal (Applicant)
- Add Journal (Property)
- View Property
- View Applicant

5

Click "Feedback"

The screenshot shows the 'Edit Viewing' modal form. The 'Feedback' button is highlighted with an orange circle. The form contains fields for viewing details and applicant information.

Edit Viewing

Details

Viewing Multiple Properties ☐

Event title
Viewing - 98 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

Buttons: Add new call, Send SMS, Send Email

6

Click either the "Private Feedback Notes" or "Public Feedback Notes" field and enter the feedback notes you want to add.

You can create a Private, or Public feedback template to allow you to quickly and accurately compile feedback.

Edit Viewing ✕

Details Feedback

Email Form To Applicant SMS Form To Applicant

☆☆☆☆☆ ☆☆☆☆☆ ☆☆☆☆☆

Location Value for Money Attributes

Private Feedback Public Feedback

Private Feedback Notes Public Feedback Notes

Save Private Template... Save Public Template...

Cancel Save Viewing

- 7 Add your feedback (either private or public) Click "Save Viewing"

The screenshot shows the 'Edit Viewing' dialog box with the 'Feedback' tab selected. At the top, there are two orange buttons: 'Email Form To Applicant' and 'SMS Form To Applicant'. Below these are three star rating sections for 'Location', 'Value for Money', and 'Attributes', each with five stars. Under 'Location' is a 'Private Feedback' section with a text area containing 'No reply from viewer' and a 'Save Private Template...' button. Under 'Value for Money' is a 'Public Feedback' section with a text area for 'Public Feedback Notes' and a 'Save Public Template...' button. At the bottom are 'Cancel' and 'Save Viewing' buttons. The 'Save Viewing' button is circled in orange.

- 8 If want to keep adding feedback to the record click "No, Don't Mark It!" this will allow you to keep adding comments, for example if you cant get in touch with the viewer and want to leave a note showing you tried. etc.

The screenshot shows a modal dialog box titled 'Feedback Received?' with a question mark icon. The text inside asks 'Would you like to mark this viewing as Feedback Received?'. There are two buttons: 'Yes, mark it!' (orange) and 'No, Don't Mark It!' (dark blue). The 'No, Don't Mark It!' button is circled in orange. The background shows the 'Edit Viewing' dialog box from the previous step, dimmed.

9

If you have been successful (or have decided to stop trying) click the "Public Feedback Notes" field and copy the feedback you want to show to the Vendor/Landlord into the private notes field and click 'Save Viewing'

The screenshot shows a mobile application interface for providing feedback. At the top, there are two orange buttons: "Email Form To Applicant" and "SMS Form To Applicant". Below these are three star rating sections for "Location", "Value for Money", and "Attributes". Underneath the ratings are two text input fields: "Private Feedback" and "Public Feedback". The "Private Feedback" field contains the text "no feedback left". The "Public Feedback" field is empty and has a placeholder text "Public Feedback Notes". Below these fields are two buttons: "Save Private Template..." and "Save Public Template...". At the bottom of the form are two buttons: "Cancel" and "Save Viewing".

10

Click "Yes, mark it!" the feedback will be saved and the record marked as completed. The record will be removed from the 'Viewings Requiring Feedback' list.

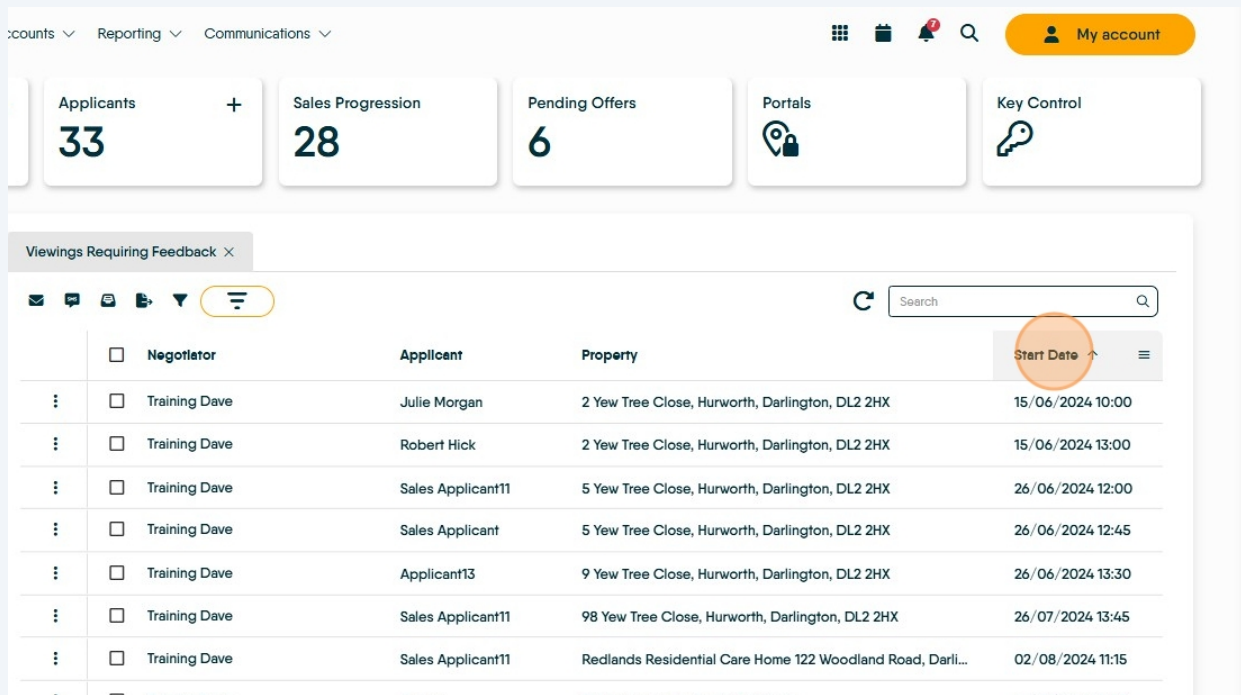
The screenshot shows the same mobile application interface as before, but with a confirmation dialog box overlaid. The dialog box has a question mark icon and the text "Feedback Received? Would you like to mark this viewing as Feedback Received?". There are two buttons in the dialog: "Yes, mark it!" and "No, Don't Mark It!". The "Yes, mark it!" button is highlighted with an orange circle. The background form is slightly dimmed, showing the same fields and buttons as in the previous screenshot.

Sorting The Activity List Screen

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To sort the Activity List screen, click on any of the column headers and this will sort the data by ascending or descending order based on the column selected. For a more detailed sort click the 3 lines that show when the mouse is hovered over the column header.

Here we selected the date column so the order would be oldest to newest (first click) or newest to oldest (second click) depending on how many times the header is clicked. You can also use the search box to search for specific records.

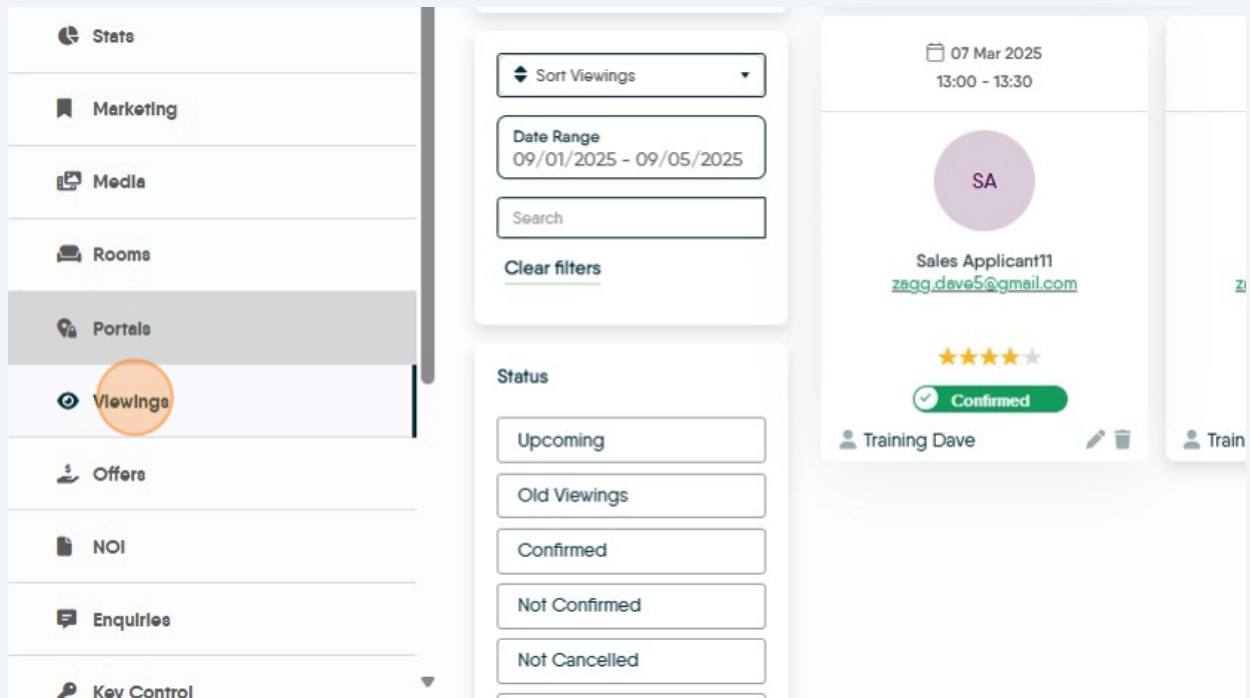


The screenshot shows the 'Viewings Requiring Feedback' section of the software. At the top, there are navigation tabs for 'Accounts', 'Reporting', and 'Communications'. Below these are five summary cards: 'Applicants' (33), 'Sales Progression' (28), 'Pending Offers' (6), 'Portals', and 'Key Control'. The main area displays a table of viewings. The table has columns for 'Negotiator', 'Applicant', 'Property', and 'Start Date'. The 'Start Date' column header is highlighted with a red circle, indicating it is the selected sort column. The table lists several viewings, all with 'Training Dave' as the negotiator. The start dates range from 15/06/2024 to 02/08/2024.

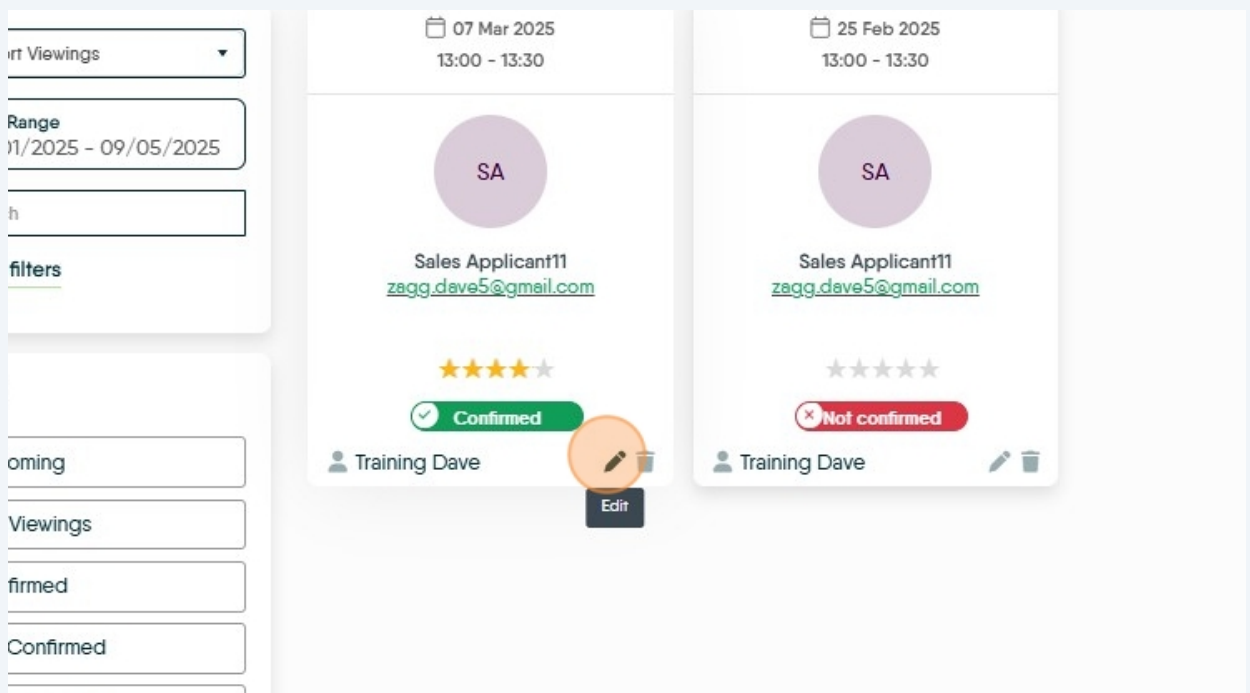
	<input type="checkbox"/> Negotiator	Applicant	Property	Start Date
⋮	<input type="checkbox"/> Training Dave	Julie Morgan	2 Yew Tree Close, Hurworth, Darlington, DL2 2HX	15/06/2024 10:00
⋮	<input type="checkbox"/> Training Dave	Robert Hick	2 Yew Tree Close, Hurworth, Darlington, DL2 2HX	15/06/2024 13:00
⋮	<input type="checkbox"/> Training Dave	Sales Applicant11	5 Yew Tree Close, Hurworth, Darlington, DL2 2HX	26/06/2024 12:00
⋮	<input type="checkbox"/> Training Dave	Sales Applicant	5 Yew Tree Close, Hurworth, Darlington, DL2 2HX	26/06/2024 12:45
⋮	<input type="checkbox"/> Training Dave	Applicant13	9 Yew Tree Close, Hurworth, Darlington, DL2 2HX	26/06/2024 13:30
⋮	<input type="checkbox"/> Training Dave	Sales Applicant11	98 Yew Tree Close, Hurworth, Darlington, DL2 2HX	26/07/2024 13:45
⋮	<input type="checkbox"/> Training Dave	Sales Applicant11	Redlands Residential Care Home 122 Woodland Road, Darli...	02/08/2024 11:15

Leaving Feedback from the Property or Applicant Records

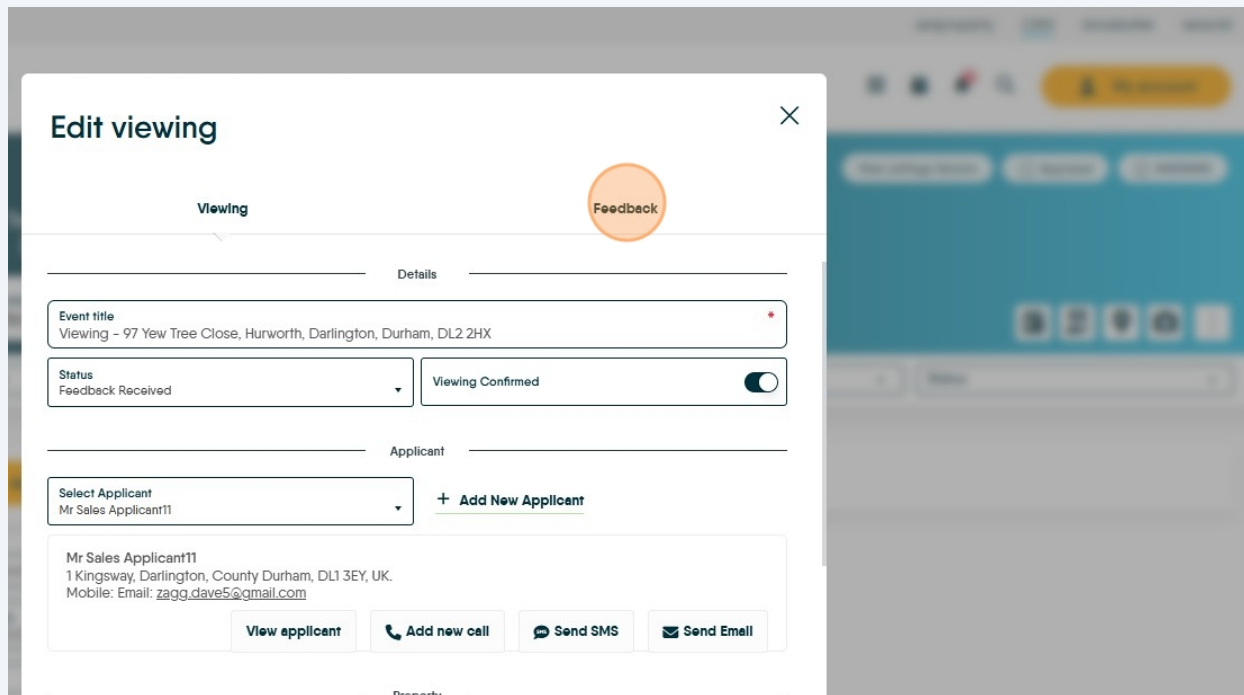
- 12 In the Property or the Applicant record, in the left menu scroll and select 'Viewings' to see the viewing record .



- 13 Click here.



14 Click "Feedback"



The screenshot shows a web application interface for managing viewings. A modal window titled "Edit viewing" is open, with a close button (X) in the top right corner. The modal has two tabs: "Viewing" and "Feedback". The "Feedback" tab is highlighted with an orange circle. The "Viewing" tab is currently active, showing a form with the following fields:

- Event title:** Viewing - 97 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX
- Status:** Feedback Received (dropdown menu)
- Viewing Confirmed:** Toggle switch (currently off)
- Select Applicant:** Mr Sales Applicant11 (dropdown menu)
- + Add New Applicant:** Button
- Applicant details:** Mr Sales Applicant11, 1 Kingsway, Darlington, County Durham, DL1 3EY, UK. Mobile: Email: zagg.dave5@gmail.com
- Action buttons:** View applicant, Add new call, Send SMS, Send Email

15 Then leave notes as you would accessing the feedback from the Viewing appointment in the calendar.

Detailed Process for Leaving feedback.



Tip! For accurately noting feedback you can create a feedback template, this might contain recommended wording or questions to be asked of the viewer.

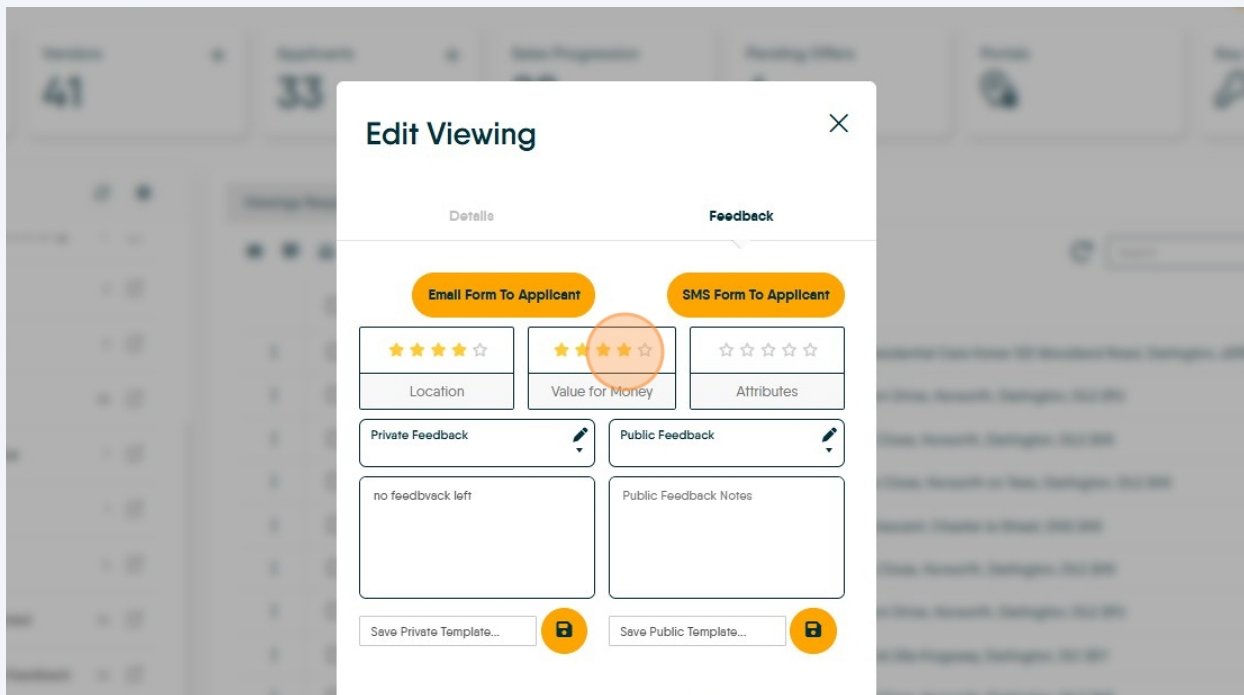
- 16 Create feedback templates in this section, click the 'Pencil' to create the template.

The screenshot shows a feedback template creation interface. At the top, there are three star rating sections: 'Location' (4 yellow stars, 1 grey), 'Value for Money' (5 grey), and 'Attributes' (5 grey). Below these are two main feedback sections: 'Private Feedback' and 'Public Feedback', each with a pencil icon for editing. An orange box highlights these two sections. Below 'Private Feedback' is a text area labeled 'no feedback left'. Below 'Public Feedback' is a text area labeled 'Public Feedback Notes'.

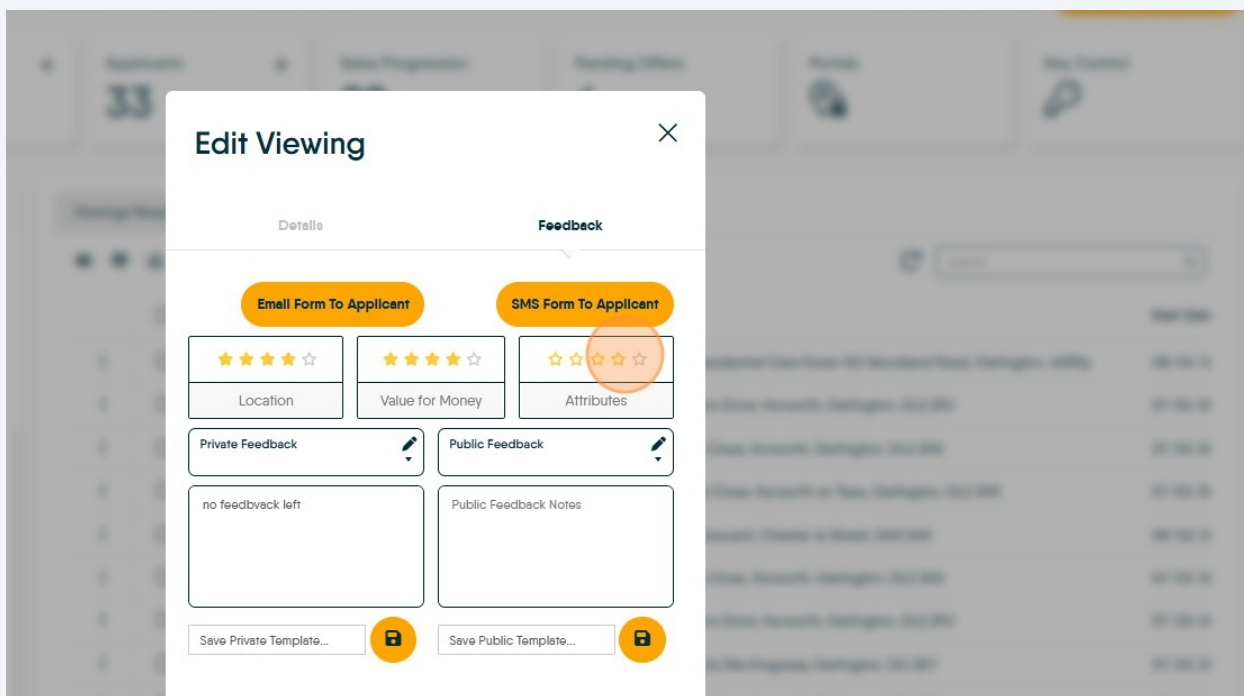
- 17 Click here and leave 'stars' for the property 'Location'

The screenshot shows the 'Edit Viewing' modal with the 'Feedback' tab selected. At the top, there are two buttons: 'Email Form To Applicant' and 'SMS Form To Applicant'. Below these are three star rating sections: 'Location' (4 yellow stars, 1 grey), 'Value for Money' (5 grey), and 'Attributes' (5 grey). The 'Location' star rating is highlighted with an orange circle. Below these are two main feedback sections: 'Private Feedback' and 'Public Feedback', each with a pencil icon for editing. Below 'Private Feedback' is a text area labeled 'no feedback left'. Below 'Public Feedback' is a text area labeled 'Public Feedback Notes'. At the bottom, there are two buttons: 'Save Private Template...' and 'Save Public Template...', each with a lock icon.

- 18 Click here and leave 'stars' for the properties 'Value for Money'



- 19 Click here and leave 'stars' for the property 'Attributes'



20

Click the "Private Feedback Notes" field and leave any Private feedback received from the viewer. If the viewer leaves feedback via the emailed link, their feedback will show here for you to edit and copy to public feedback.

The screenshot shows a 'Feedback' modal form with two tabs: 'Details' and 'Feedback'. The 'Feedback' tab is active. It contains two orange buttons at the top: 'Email Form To Applicant' and 'SMS Form To Applicant'. Below these are three star rating sections for 'Location', 'Value for Money', and 'Attributes'. The 'Private Feedback' section has a text area with the placeholder 'no feedback left' and a pencil icon. The 'Public Feedback' section has a text area labeled 'Public Feedback Notes'. At the bottom, there are 'Save Private Template...' and 'Save Public Template...' buttons, each with a lock icon, and 'Cancel' and 'Save Viewing' buttons.

21

Click the "Public Feedback Notes" field add the feedback notes you want the Vendor/Landlord to see.

This screenshot is identical to the one above, showing the 'Feedback' modal form. In this instance, the 'Public Feedback Notes' text area is highlighted with an orange circle, indicating where the user should click to add feedback notes for the Vendor/Landlord to see.

22

If you have been successful (or have decided to stop trying) click the "Public Feedback Notes" field and copy the feedback you want to show to the Vendor/Landlord into the private notes field and click 'Save Viewing'

The screenshot shows a mobile application interface for providing feedback. At the top, there are two orange buttons: "Email Form To Applicant" and "SMS Form To Applicant". Below these are three star rating sections for "Location", "Value for Money", and "Attributes", each with five stars. Underneath the ratings are two text input fields: "Private Feedback" and "Public Feedback". The "Private Feedback" field contains the text "no feedback left". The "Public Feedback" field is empty and has a placeholder text "Public Feedback Notes". Below these fields are two buttons: "Save Private Template..." and "Save Public Template...". At the bottom of the form are two buttons: "Cancel" and "Save Viewing".

23

Click "Yes, mark it!" the feedback will be saved and the record marked as completed. The record will be removed from the 'Viewings Requiring Feedback' list.

The screenshot shows the same mobile application interface as in the previous step, but with a confirmation dialog box overlaid. The dialog box has a question mark icon at the top and the text "Feedback Received? Would you like to mark this viewing as Feedback Received?". There are two buttons in the dialog: "Yes, mark it!" and "No, Don't Mark It!". The "Yes, mark it!" button is highlighted with an orange circle. The background form is slightly dimmed, showing the same fields and buttons as before.

24

If want to keep adding feedback to the record click "No, Don't Mark It!" this will allow you to keep adding comments, for example if you cant get in touch with the viewer and want to leave a note showing you tried. etc. The record will stay in the 'Viewings Requiring Feedback' list until cleared.

