

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.

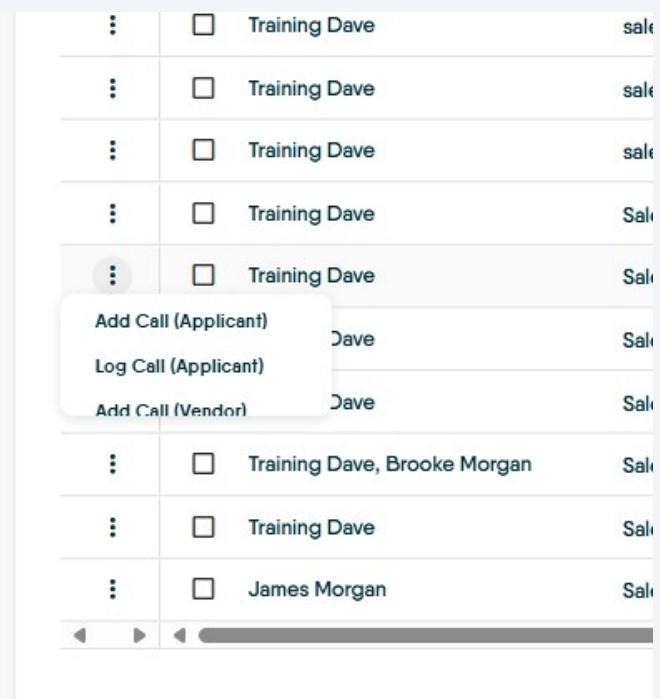
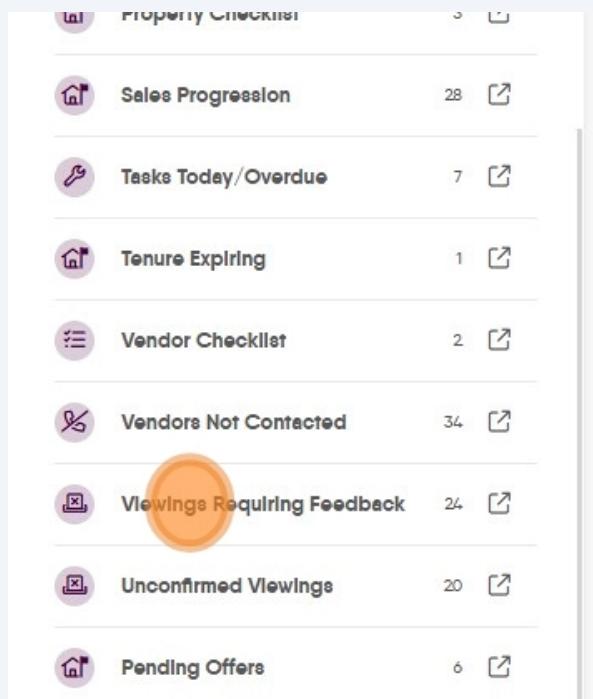
Adding Feedback via Lettings/Sales Activity Dashboard

1

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

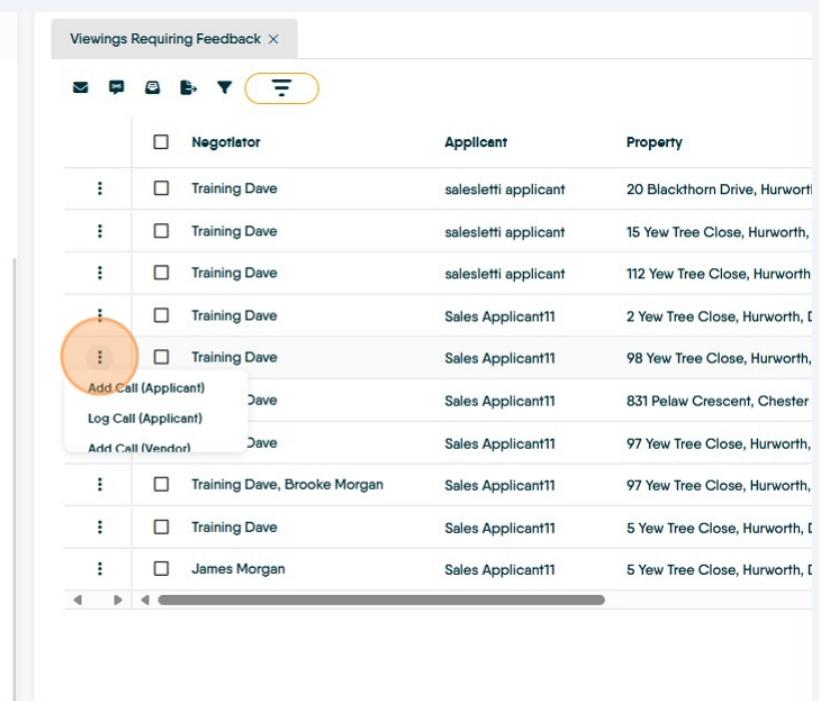
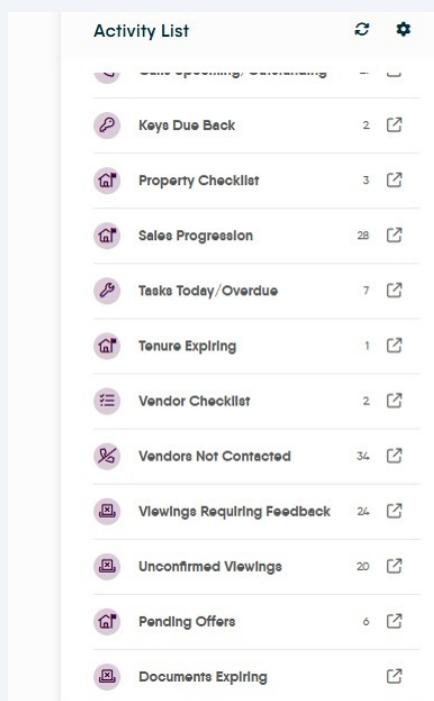
2 Navigate to <https://crm.iamproperty.com/Dashboards/Sales>

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.



	<input type="checkbox"/> Training Dave	sale
⋮	<input type="checkbox"/> Training Dave	sale
⋮	<input type="checkbox"/> Training Dave	sale
⋮	<input type="checkbox"/> Training Dave	sale
⋮	<input type="checkbox"/> Training Dave	sale
⋮	<input type="checkbox"/> Training Dave	sale
Add Call (Applicant)		Dave
Log Call (Applicant)		Dave
Add Call (Vendor)		Dave
⋮	<input type="checkbox"/> Training Dave, Brooke Morgan	sale
⋮	<input type="checkbox"/> Training Dave	sale
⋮	<input type="checkbox"/> James Morgan	sale

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



	<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, I
⋮	<input type="checkbox"/> Training Dave	Sales Applicant11	98 Yew Tree Close, Hurworth,
⋮	<input type="checkbox"/> Training Dave	Sales Applicant11	831 Pelaw Crescent, Chester
⋮	<input type="checkbox"/> Training Dave, Brooke Morgan	Sales Applicant11	97 Yew Tree Close, Hurworth,
⋮	<input type="checkbox"/> Training Dave	Sales Applicant11	5 Yew Tree Close, Hurworth, I
⋮	<input type="checkbox"/> James Morgan	Sales Applicant11	5 Yew Tree Close, Hurworth, I

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

The screenshot shows a software interface with a left sidebar and a main content area. The sidebar contains a list of tasks with icons and counts: Keys Due Back (2), 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), and Documents Expiring (2). The main content area shows a table with columns for Negotiator, Applicant, and Property. A context menu is open over a row, with the 'Open Viewing' option highlighted by an orange circle. Other options in the menu include Add Call (Applicant), Log Call (Applicant), Add Call (Vendor), Log Call (Vendor), Send Email (Vendor), Send SMS (Vendor), Add Journal (Applicant), Add Journal (Property), View Property, and View Applicant.

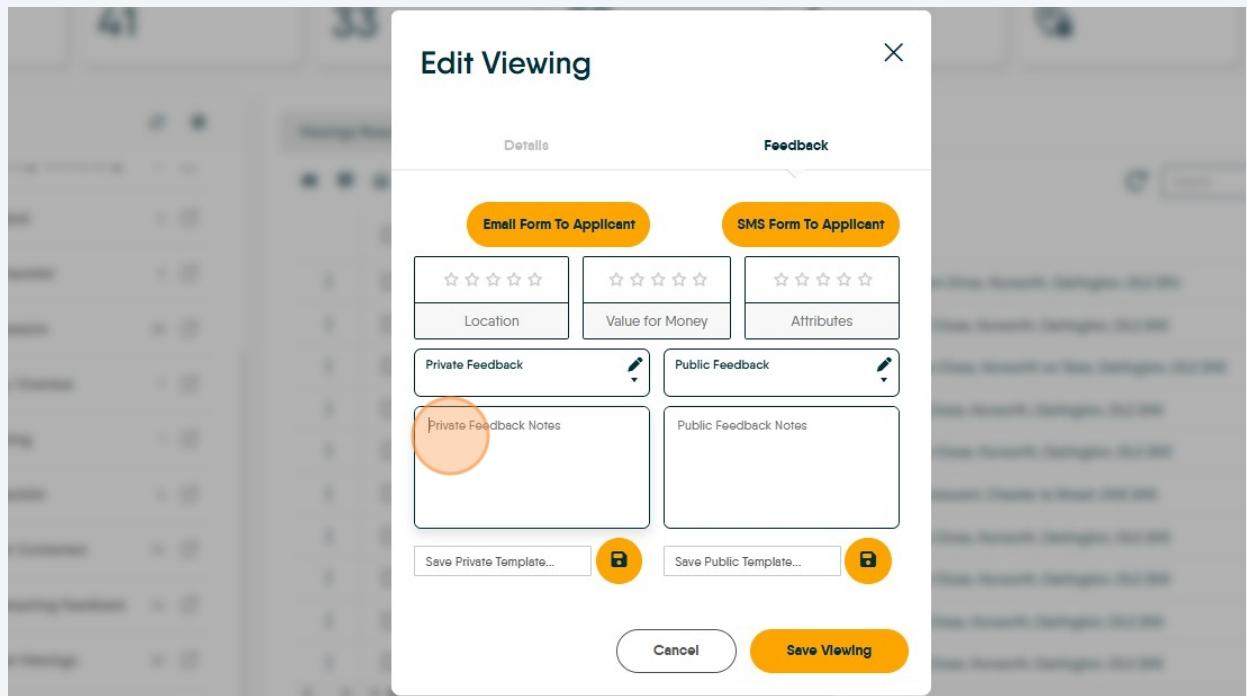
5 Click "Feedback"

The screenshot shows an 'Edit Viewing' dialog box. The 'Feedback' tab is selected and highlighted with an orange circle. The 'Details' tab is also visible. The 'Details' tab contains the following fields: 'Viewing Multiple Properties' (with a toggle switch), 'Event title' (set to 'Viewing - 98 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX'), 'Status' (set to 'Booked'), and 'Viewing Confirmed' (with a toggle switch). The 'Applicant' tab shows a dropdown for 'Select Applicant' (set to 'Mr Sales Applicant11') and a button for '+ Add New Applicant'. At the bottom of the dialog box are buttons for 'Add new call', 'Send SMS', and 'Send Email'.

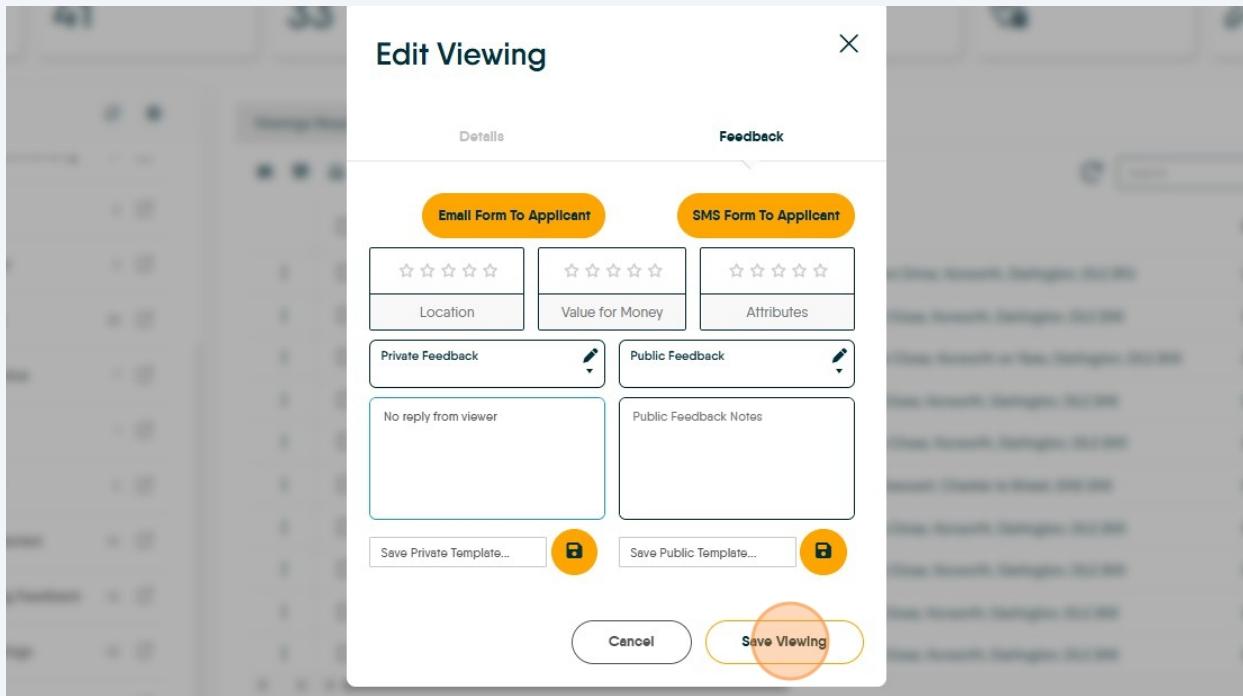
6

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

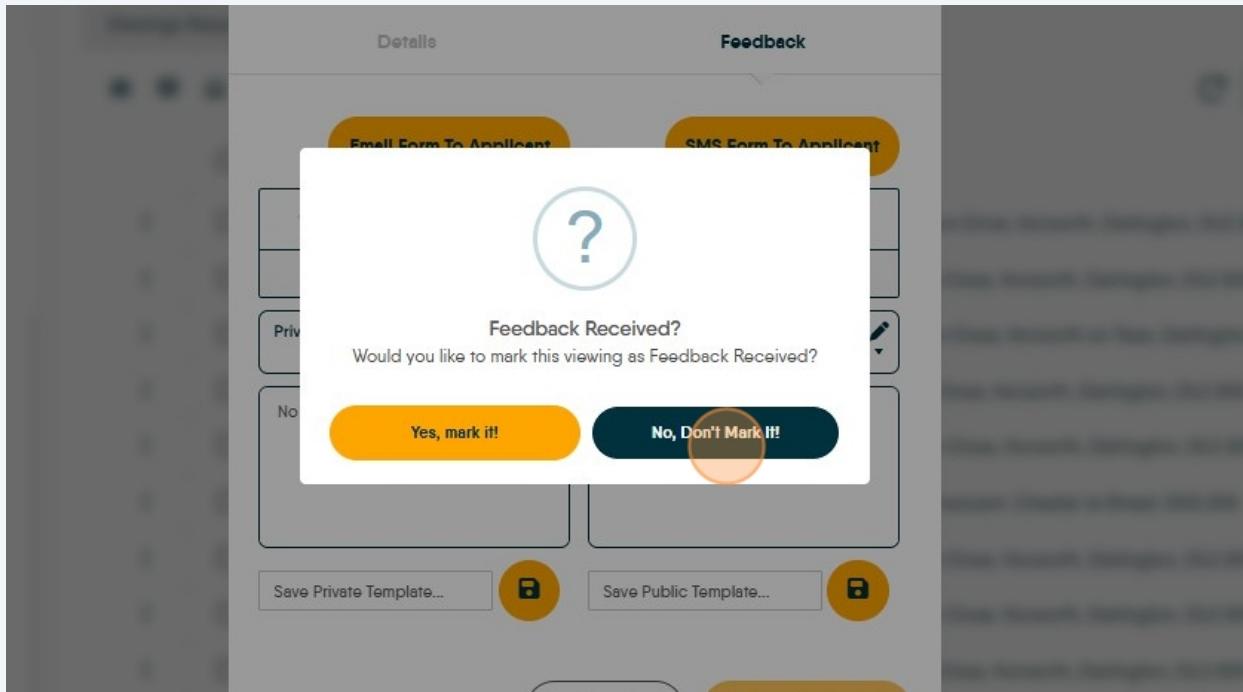
You can create a Private, or Public feedback template to allow you to quickly and accurately compile feedback.



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

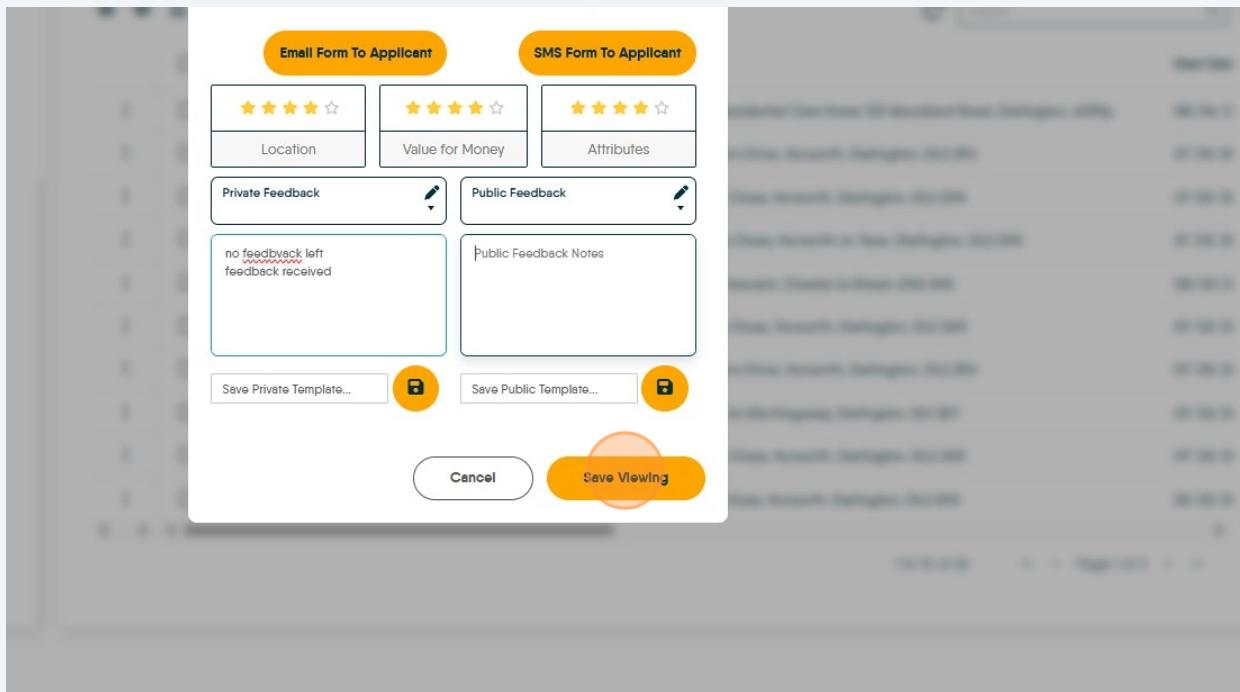


8 If want to keep adding feedback to the record click "No, Don't Mark It!" this will allow you to keep adding comments, for example if you cant get in touch with the viewer and want to leave a note showing you tried. etc.



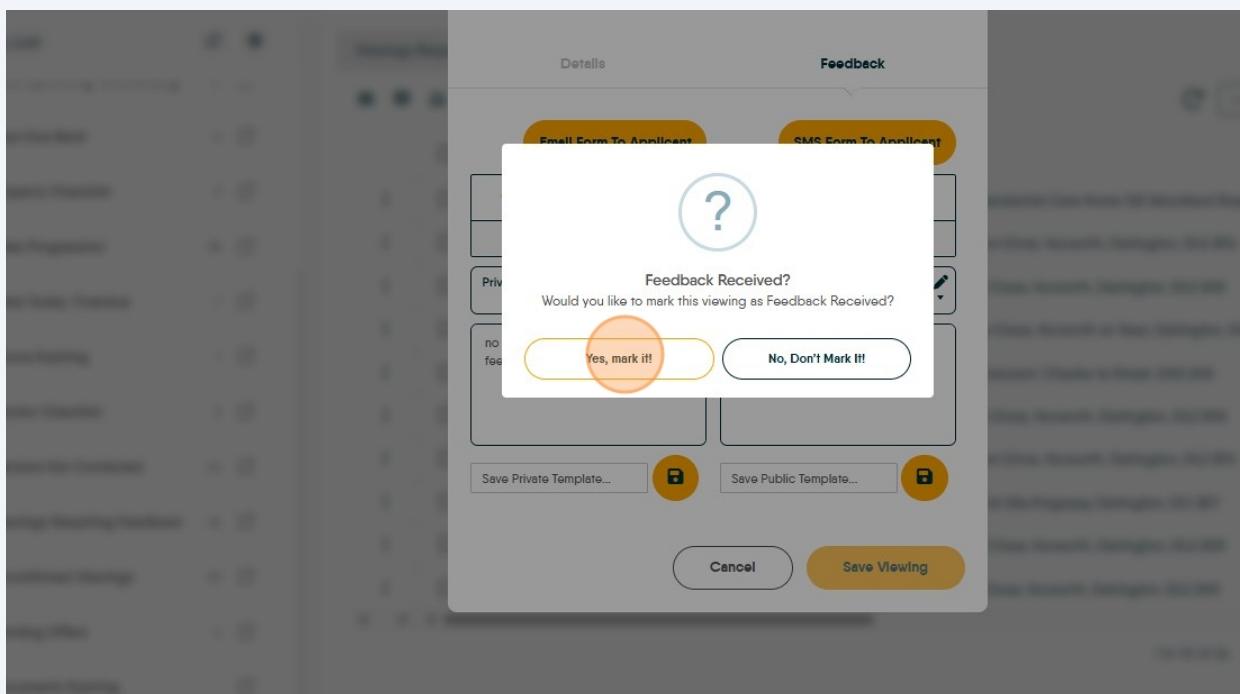
9

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'



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.

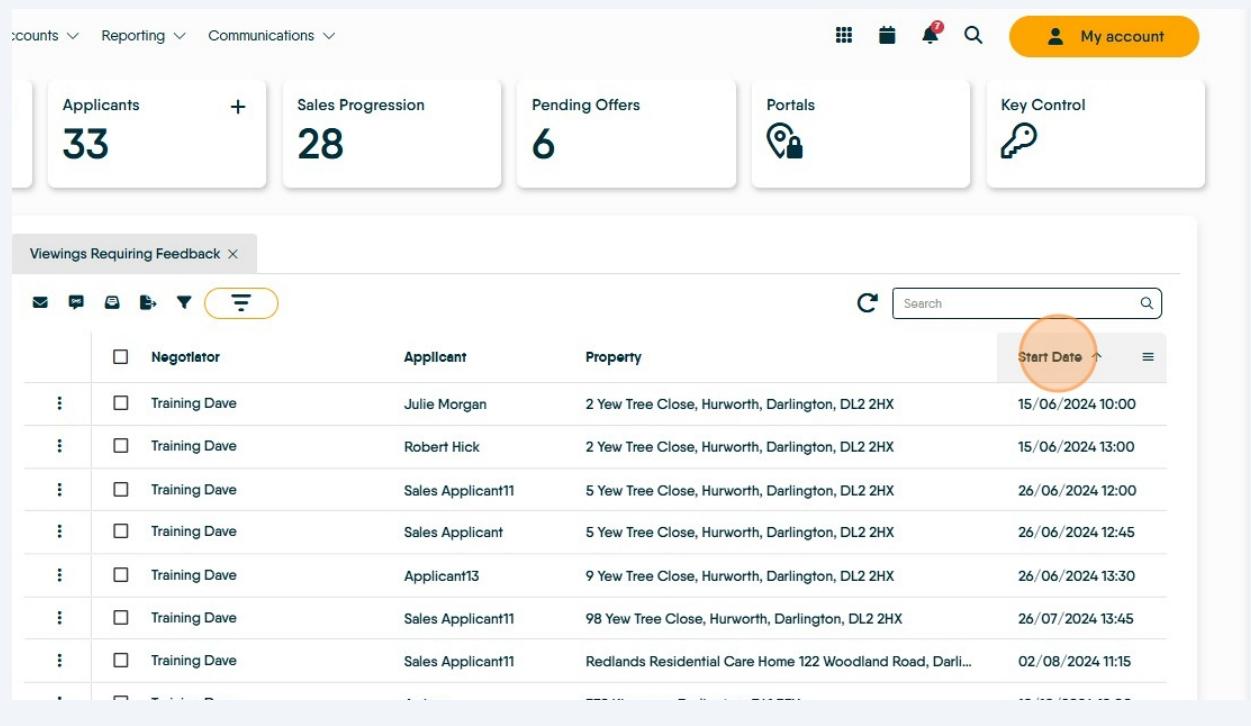


Sorting The Activity List Screen

11

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 a software interface for managing activity. At the top, there are navigation links: 'Counts' (with a dropdown arrow), 'Reporting' (with a dropdown arrow), 'Communications' (with a dropdown arrow), and a 'My account' button. Below these are five cards: 'Applicants' (33), 'Sales Progression' (28), 'Pending Offers' (6), 'Portals', and 'Key Control'. A sub-section titled 'Viewings Requiring Feedback' is displayed, featuring a table with the following data:

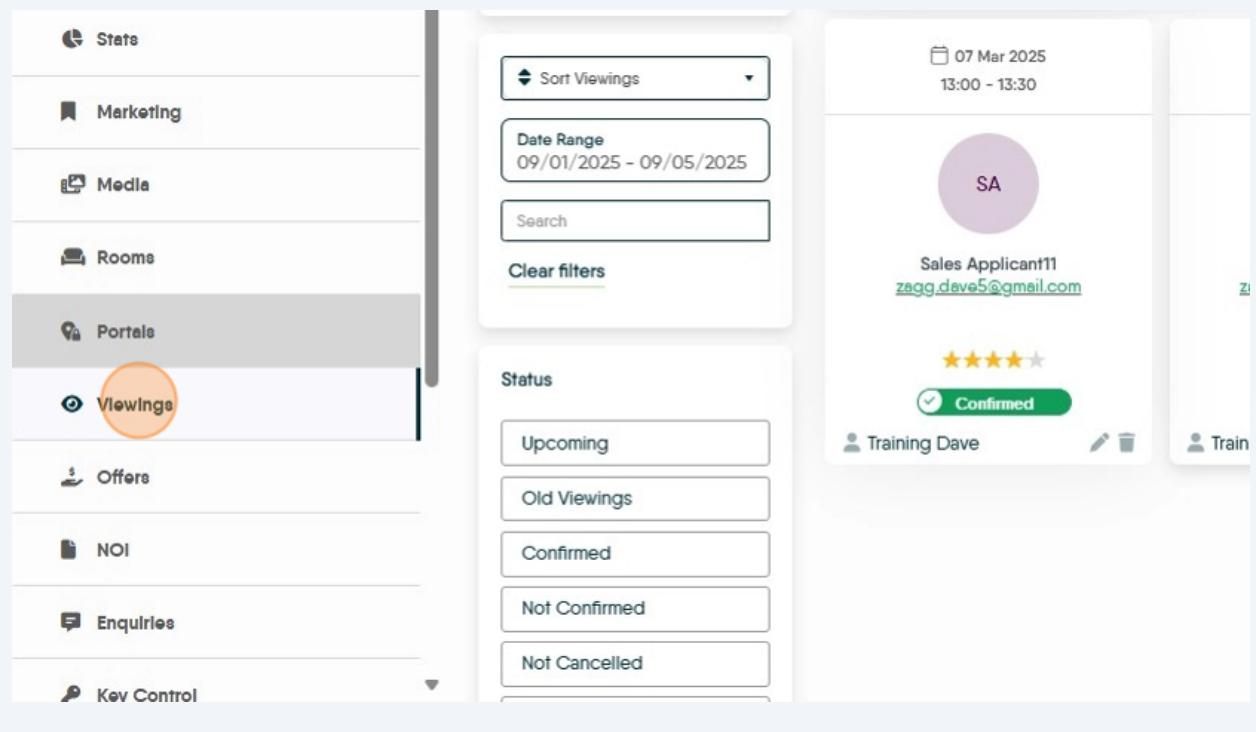
	<input type="checkbox"/> Negotiator	Applicant	Property	Start Date ↑
⋮	<input type="checkbox"/> Training Dave	Julie Morgan	2 Yew Tree Close, Hurworth, Darlington, DL2 2HX	15/06/2024 10:00
⋮	<input type="checkbox"/> Training Dave	Robert Hick	2 Yew Tree Close, Hurworth, Darlington, DL2 2HX	15/06/2024 13:00
⋮	<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

The 'Start Date ↑' column header is highlighted with a red circle. The table also includes a search bar at the top right and various filter and sort icons.

Leaving Feedback from the Property or Applicant Records

12

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



The screenshot shows a software interface with a left sidebar and a main viewing record area. The sidebar contains the following menu items:

- State
- Marketing
- Media
- Rooms
- Portals
- Viewings** (highlighted with an orange circle)
- Offers
- NOI
- Enquiries
- Key Control

The main area displays a viewing record for "07 Mar 2025" from "13:00 - 13:30". The record includes:

- A purple circular profile picture labeled "SA".
- The text "Sales Applicant11" and the email "zagg.dave5@gmail.com".
- A yellow star rating icon.
- A green button labeled "Confirmed" with a checkmark.
- User details: "Training Dave" with edit and delete icons.
- Other icons for "Train" and "ZI".

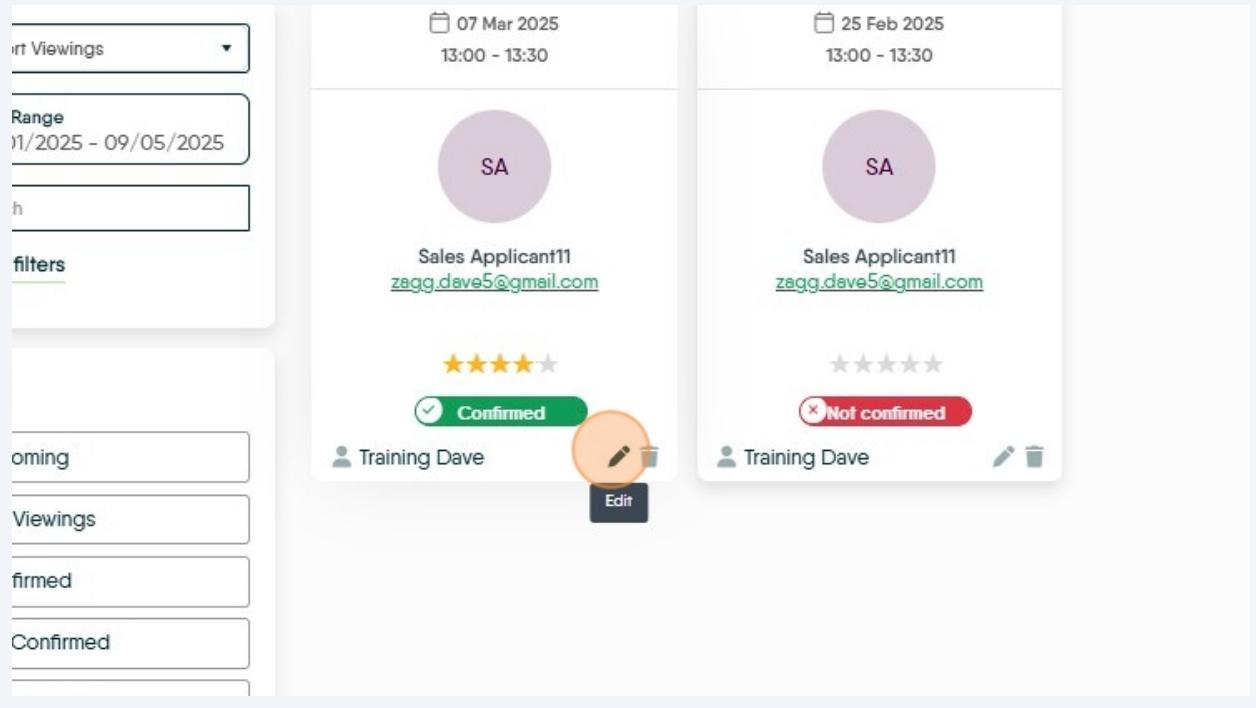
Below the sidebar, there is a list of filter options:

- Sort Viewings
- Date Range: 09/01/2025 - 09/05/2025
- Search
- Clear filters

Status filter options include: Upcoming, Old Viewings, Confirmed, Not Confirmed, and Not Cancelled.

13

Click here.



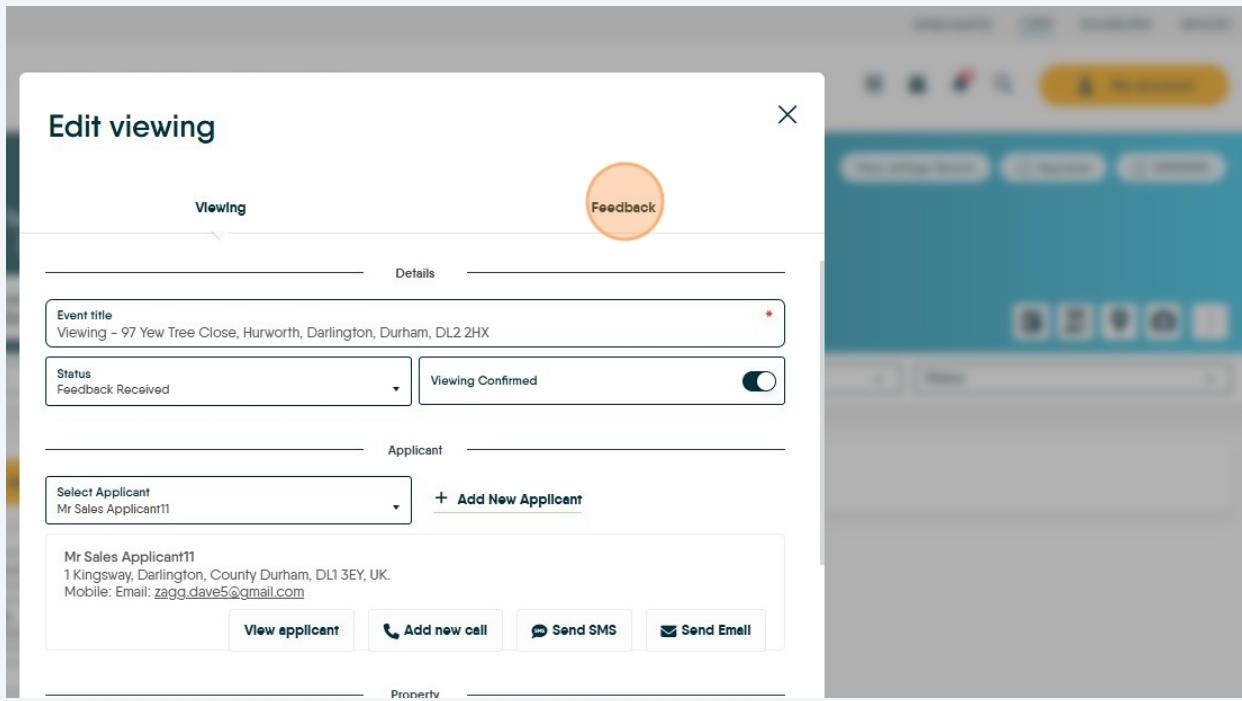
The screenshot shows a software interface with a left sidebar and a main viewing record area. The sidebar contains the following filter options:

- Sort Viewings
- Range: 01/2025 - 09/05/2025
- filters
- Upcoming
- Viewings
- Confirmed
- Not Confirmed

The main area displays two viewing records:

- 07 Mar 2025** (13:00 - 13:30): SA (Sales Applicant11, zagg.dave5@gmail.com). Status: Confirmed (green button with checkmark). Edit icon highlighted with an orange circle.
- 25 Feb 2025** (13:00 - 13:30): SA (Sales Applicant11, zagg.dave5@gmail.com). Status: Not confirmed (red button with crossmark). Edit icon.

14 Click "Feedback"



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

Detailed Process for Leaving feedback.

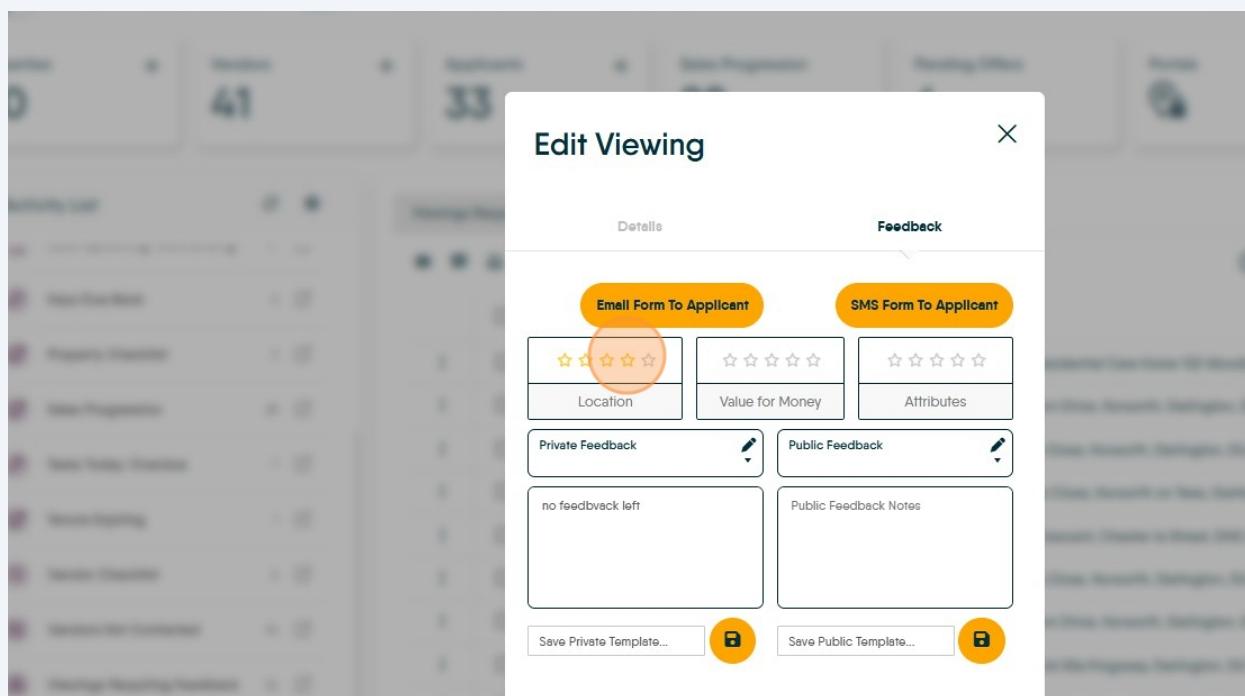


Tip! For accurately noting feedback you can create a feedback template, this might contain recommended wording or questions to be asked of the viewer.

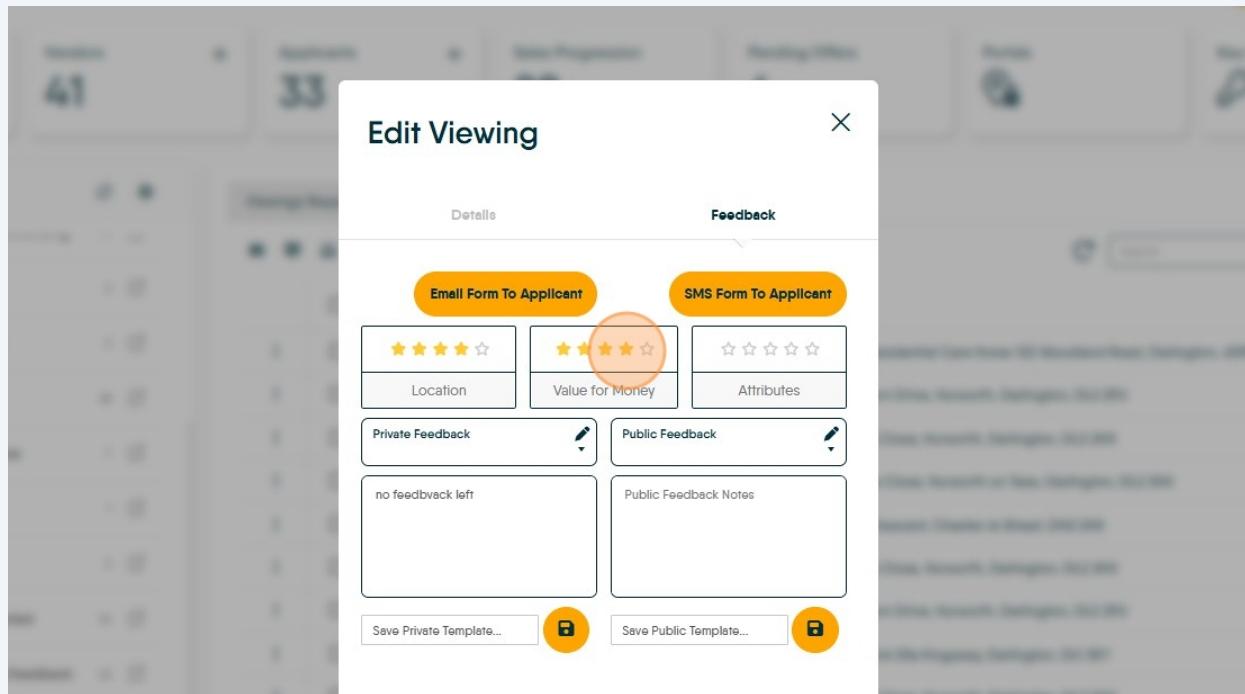
16 Create feedback templates in this section, click the 'Pencil' to create the template.



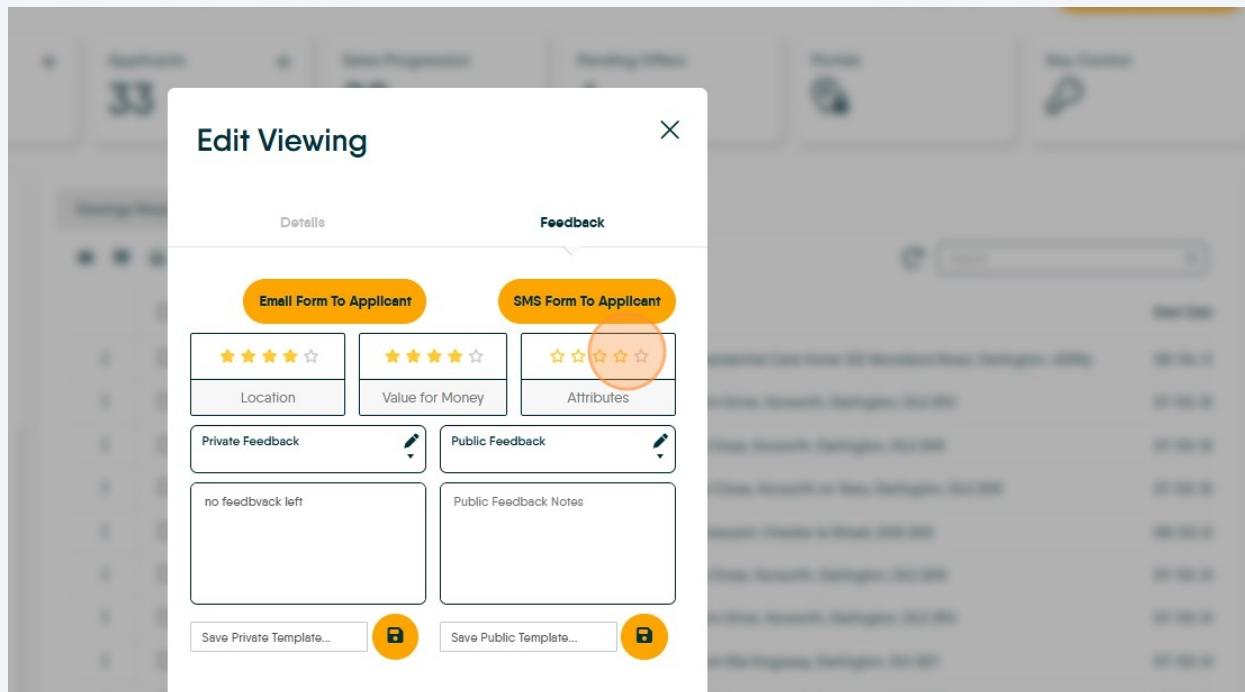
17 Click here and leave 'stars' for the property 'Location'



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

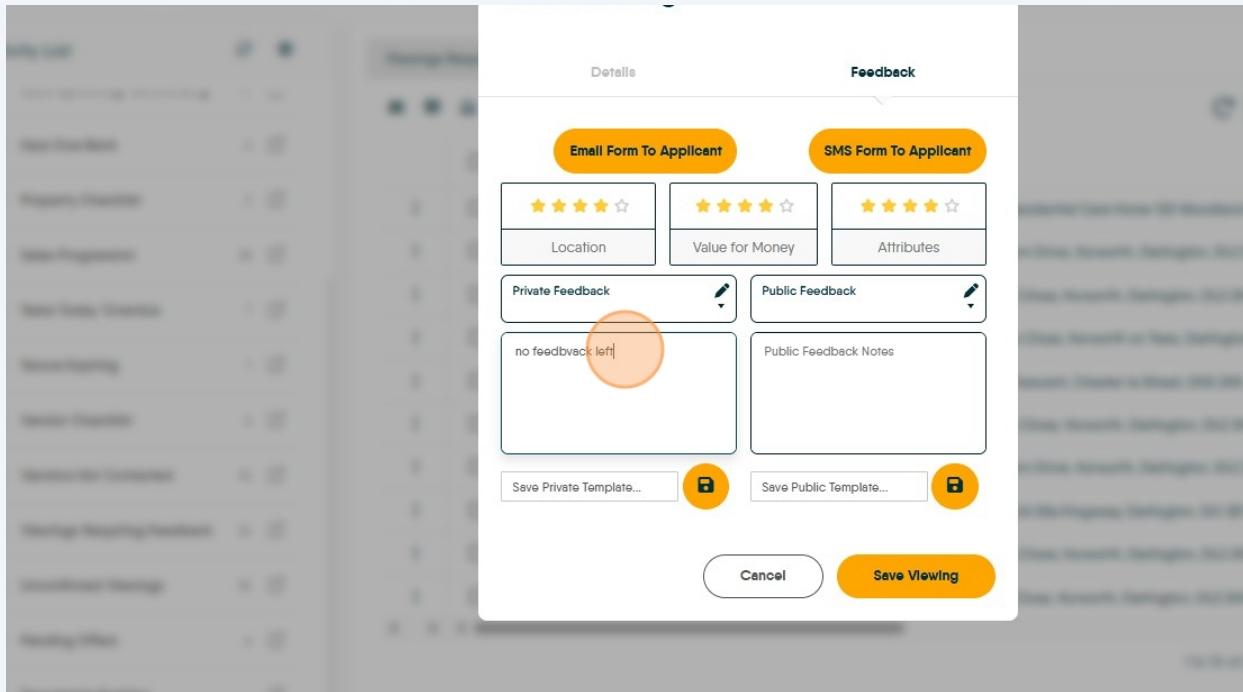


19 Click here and leave 'stars' for the property 'Attributes'



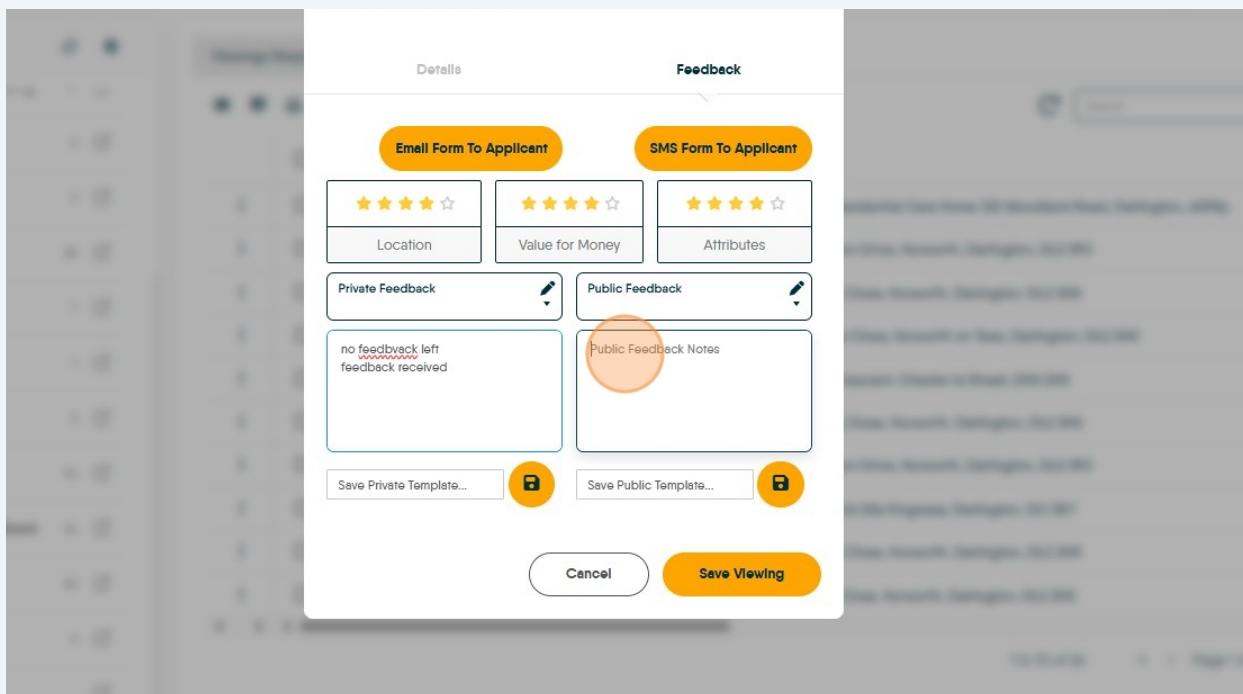
20

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.



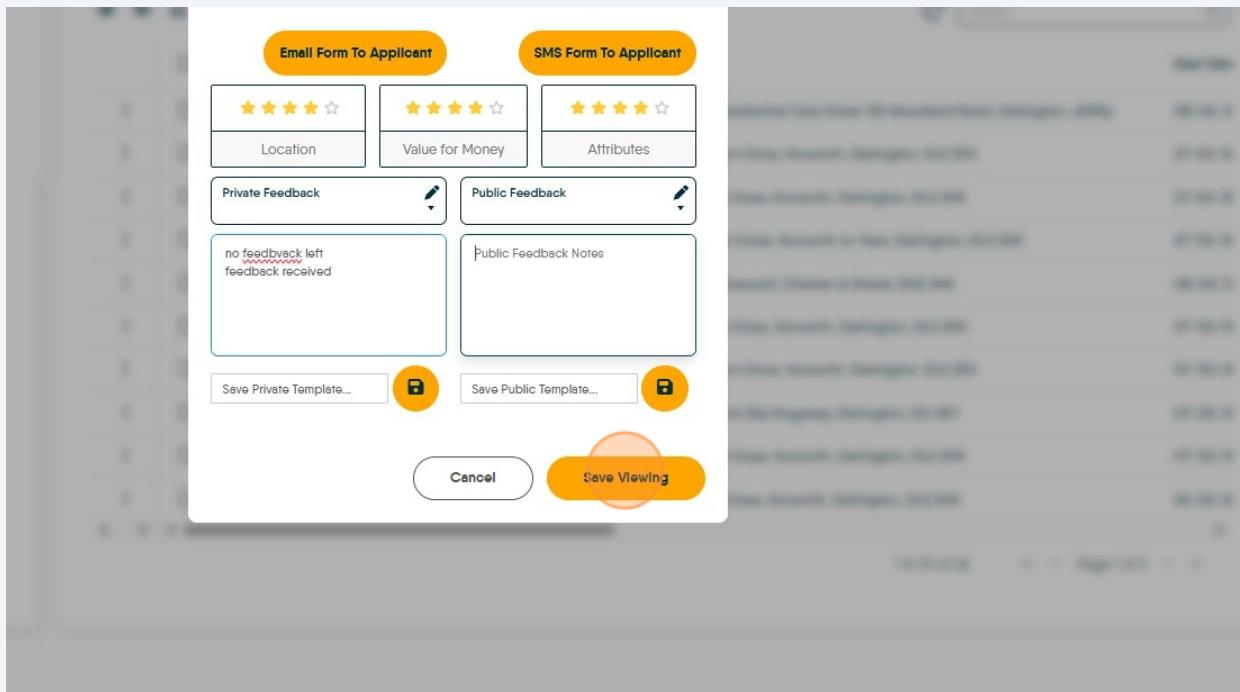
21

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



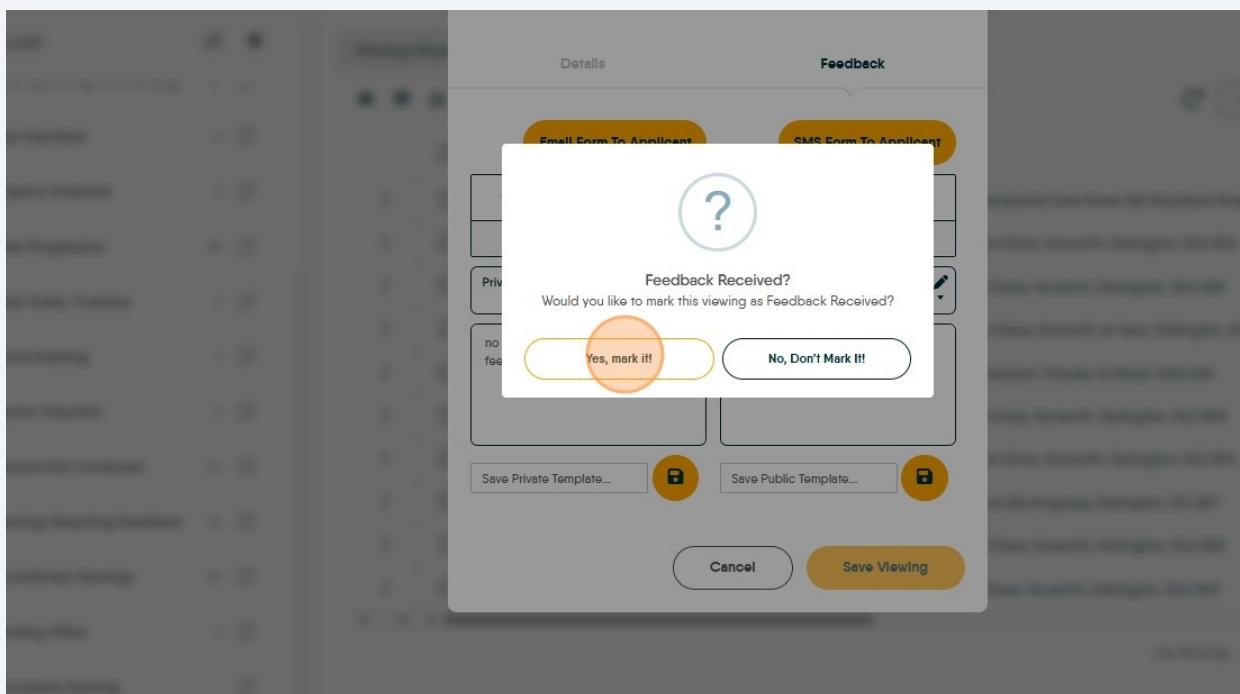
22

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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.



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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.

