

Creating Email and SMS Viewing Feedback Templates



This guide provides a step-by-step approach to creating effective email and SMS viewing feedback templates. These templates allow an automated message to be sent to a property viewer requesting feedback on their experience. This response is then shown in the viewing record.

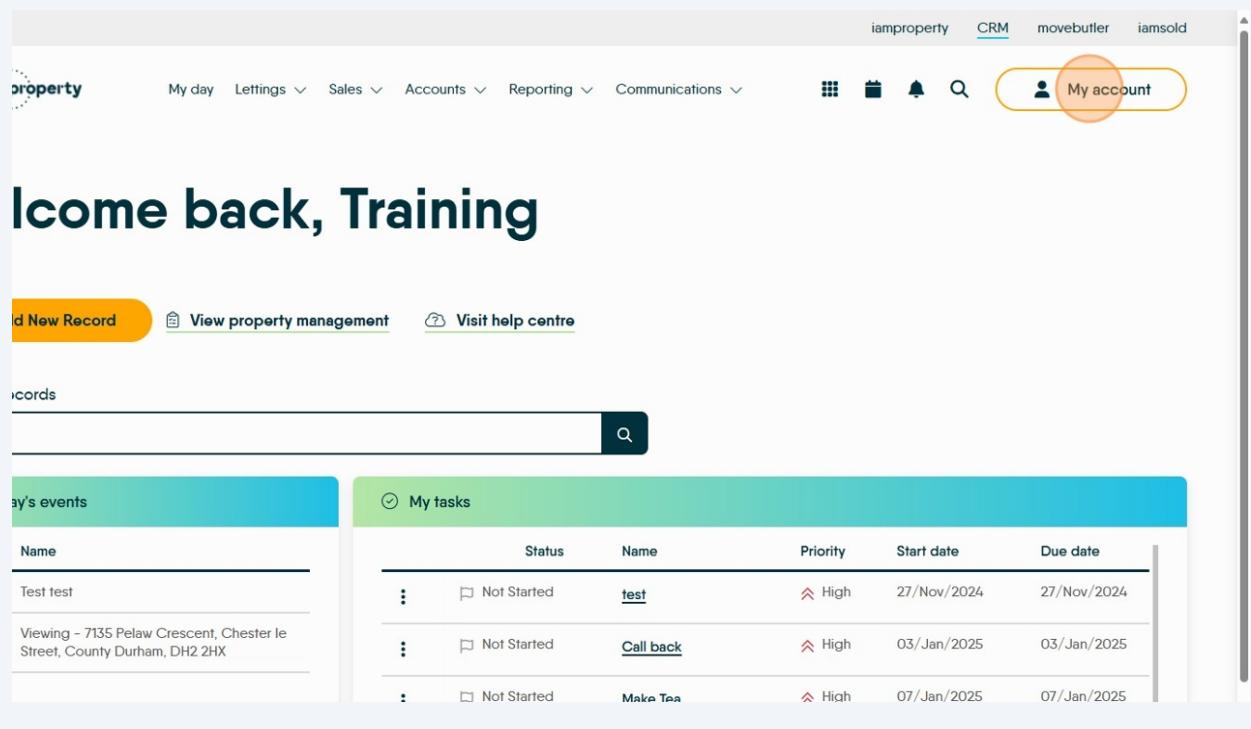
- 1 Navigate to <https://crm.iamproperty.com/MyDay>

A screenshot of the iam property CRM interface. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. To the right of the navigation bar are icons for a grid, a calendar, a bell, a search bar, and a user account. Below the navigation bar, the main area displays a 'Welcome back, Training' message. There are two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a list of events with columns for 'Time' and 'Name'. The 'My tasks' section shows a list of tasks with columns for 'Status', 'Name', 'Priority', 'Start date', and 'Due date'.

Time	Name
12:00	Test test
16:00	Viewing – 7135 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX

Status	Name	Priority	Start date	Due date
Not Started	<u>test</u>	High	27/Nov/2024	27/Nov/2024
Not Started	<u>Call back</u>	High	03/Jan/2025	03/Jan/2025
Not Started	<u>Make Tea</u>	High	07/Jan/2025	07/Jan/2025
Not Started	<u>Clean Windows</u>	High	28/Jan/2025	28/Jan/2025

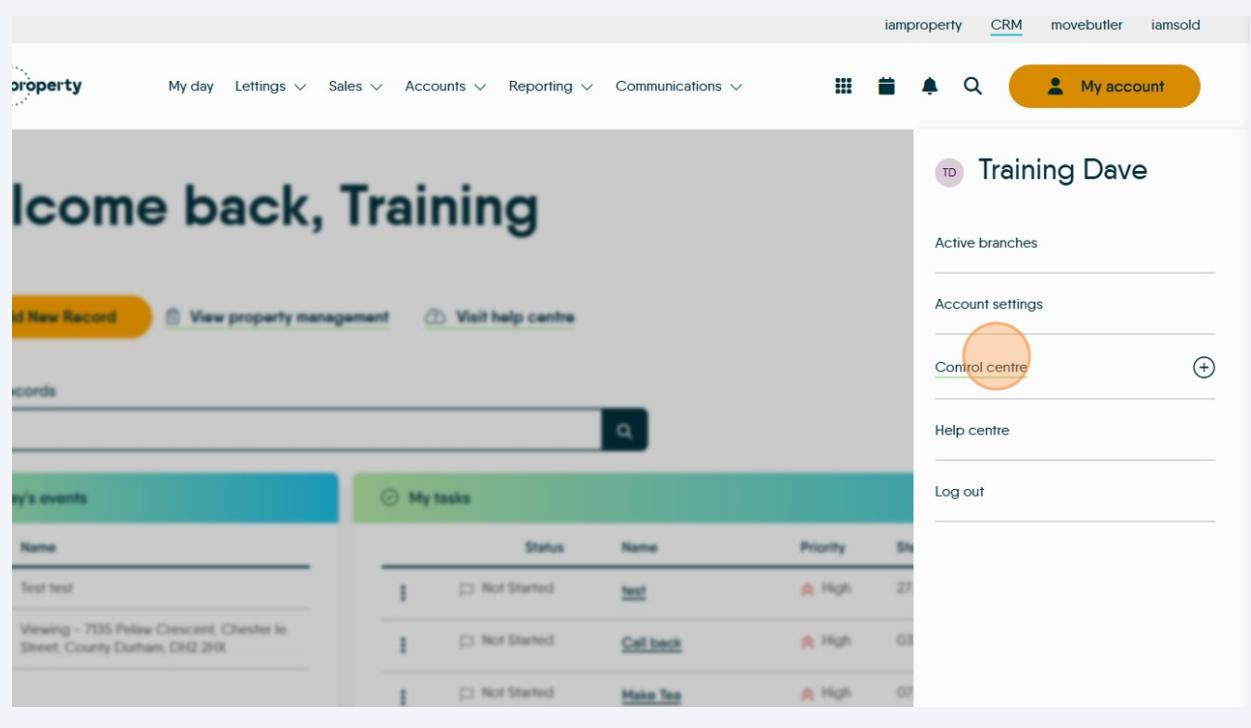
2 Click "My account"



The screenshot shows the iProperty software interface. At the top, there is a navigation bar with links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. On the far right of the top bar is a user profile icon with a dropdown arrow, which is highlighted with a yellow circle. Below the top bar, there is a search bar and a 'My account' button, also highlighted with a yellow circle. The main content area features a large title 'Income back, Training' and several buttons: 'Add New Record', 'View property management', and 'Visit help centre'. On the left, there is a sidebar with 'My events' and a list of items. On the right, there is a 'My tasks' section with a table:

	Status	Name	Priority	Start date	Due date
...	Not Started	test	High	27/Nov/2024	27/Nov/2024
...	Not Started	Call back	High	03/Jan/2025	03/Jan/2025
...	Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

3 Click "Control centre"



The screenshot shows the iProperty software interface, similar to the previous one but with a different user profile. The top navigation bar and sidebar are identical. The main content area features a large title 'Income back, Training' and several buttons: 'Add New Record', 'View property management', and 'Visit help centre'. On the right, there is a sidebar with a user profile picture 'TD' and the name 'Training Dave'. The sidebar includes sections: 'Active branches', 'Account settings', 'Control centre' (which is highlighted with a yellow circle), 'Help centre', and 'Log out'.

4 Click "Configuration"

The screenshot shows a software interface with a header "Come back, Training" and navigation links "View new record", "View property management", and "Visit help centre". The main area displays a "My tasks" list with the following items:

	Status	Name	Priority	Start Date
1	Not Started	test task	High	27/08/2023
2	Not Started	Call back	High	03/09/2023
3	Not Started	Make Tea	High	07/09/2023
4	Not Started	Clean Windows	High	28/08/2023
5	Not Started	making tea	High	04/09/2023

On the right, a sidebar titled "Control centre" lists various options: Active branches, Account settings, Control centre (which is the current section), Dashboard, Users, Configuration (which is highlighted with an orange circle), Branches, Company, Property Management Settings, and Help centre.

5 Click "Viewing templates"

The screenshot shows the "General settings" page. The sidebar on the left lists various configuration categories, with "Viewing Templates" highlighted with an orange circle. The main content area includes sections for "Gdpr - contact preferences", "Applicant matching defaults", and "Landlord portal", each containing several toggle switch options.

Gdpr - contact preferences

<input checked="" type="checkbox"/> Use Defaults	<input type="checkbox"/> Do Not Contact
<input checked="" type="checkbox"/> Email	<input checked="" type="checkbox"/> Letter
<input checked="" type="checkbox"/> SMS	<input checked="" type="checkbox"/> Phone
<input type="checkbox"/> Third Party	<input checked="" type="checkbox"/> Allow Marketing

Applicant matching defaults

<input checked="" type="checkbox"/> Matching Area

Landlord portal

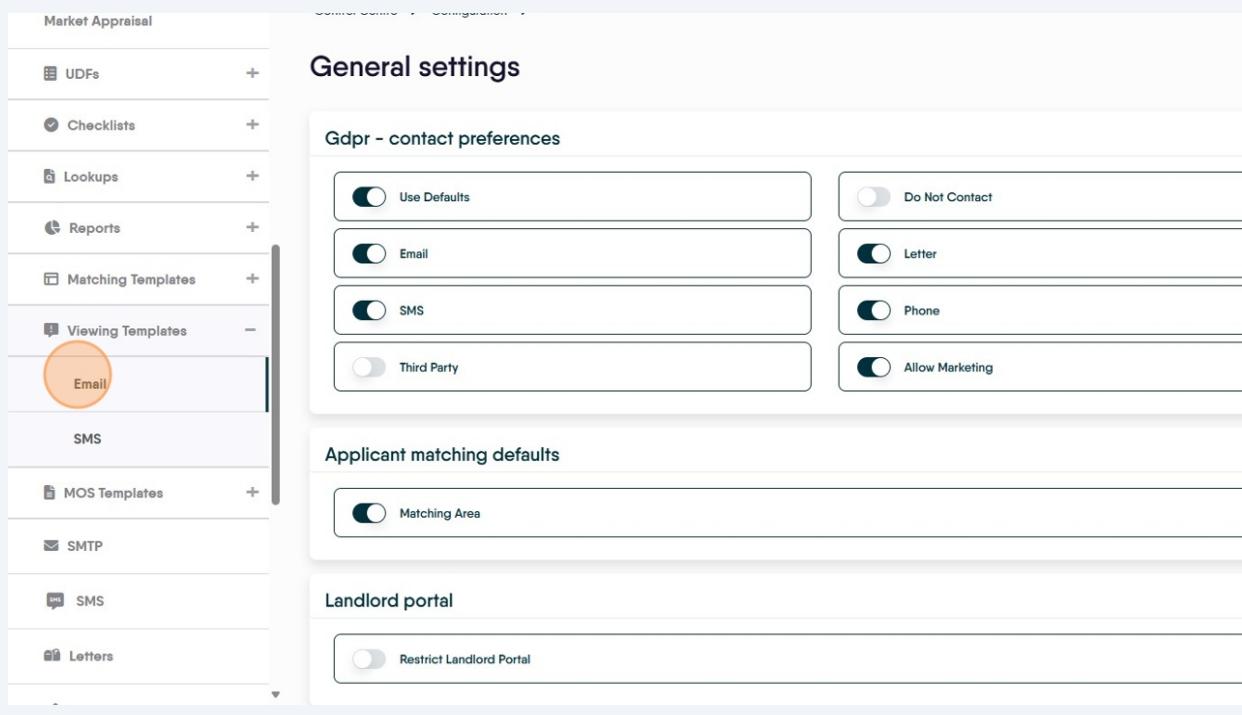
<input type="checkbox"/> Restrict Landlord Portal

6

There are 2 options for requesting feedback, email and SMS. This guide will show how to create both options.

7

Click "Email"



8 To create a new Template click here.

The screenshot shows the iamsold CRM software interface. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and a 'Control Centre' dropdown. On the right, there are icons for 'My account', 'CRM', 'movebutler', and 'iamsold'. Below the navigation, a breadcrumb path shows 'Control Centre > Configuration >'. The main title is 'Viewing templates - email'. On the left, there is a sidebar with a list of 'Templates' and a 'New' button. The main content area shows a rich text editor with a toolbar for 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', and 'Table'. The editor contains a template message:

Dear {App. Title} {App. Forename} {App. Surname}

We hope you enjoyed viewing {Prop. Property Address} we would appreciate if you can give us some feedback on your impressions of the property.

Please click this link {Prop. Viewing Link} to leave us some quick feedback.

Kind Regards

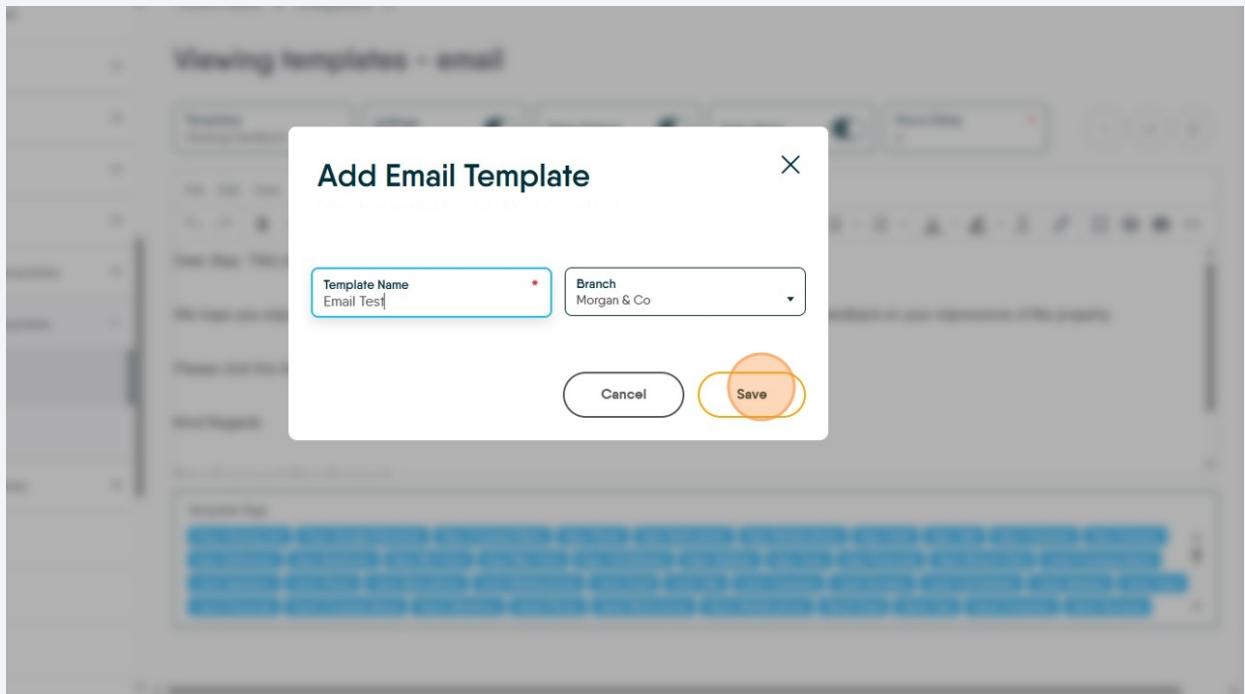
At the bottom, there is a 'Template Tags' section with a table:

Prop. Viewing Link	Prop. Google Directions	App. Company Name	App. Phone	App. Work phone	App. Mobile phone	App. Email	App. Title	App. Forename	App. Surname
App. Address	App. Address	App. Min. Price	App. Max. Price	App. Full Address	App. Address	App. Town	App. Postcode	App. Move in Date	App. Comm. Manager

9 Click the "Template Name" field and name your template.

A screenshot of a software application interface. In the center, a white dialog box is titled 'Add Email Template'. Inside the dialog, there are two input fields: 'Template Name' (with a placeholder 'Enter template name') and 'Branch' (set to 'Morgan & Co'). Below the fields are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a yellow background. The background of the application shows a list of templates, with the top item being 'Viewing Templates - email'. The overall interface is clean and modern, using a light color palette.

10 Click "Save"



11 Click into the text screen and add your text. There are template tags that will automatically add information to your message, allowing a personalised message to be sent to your applicant.

Viewing templates - email

Templates Email Test

Lettings Default Sales Default Auto-Send Hours Delay 2

File Edit View Insert Format Tools Table

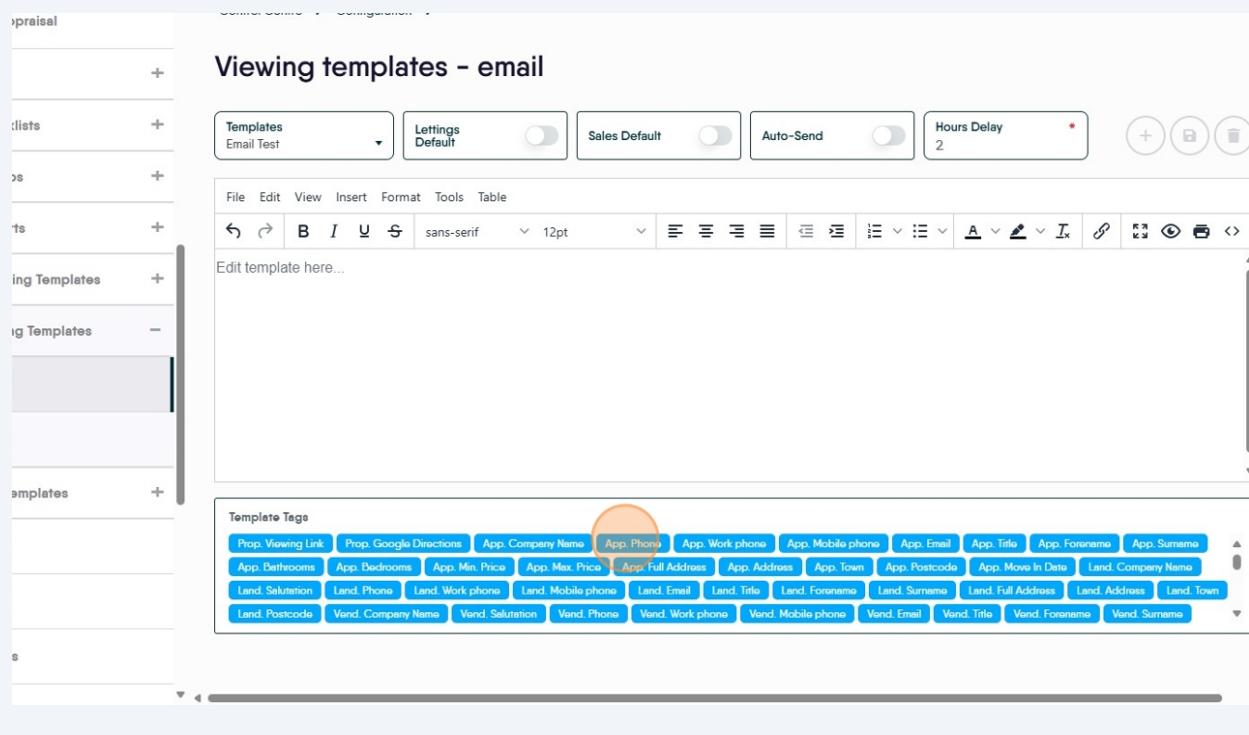
Edit template here...

Template Tags

Prop. Viewing Link	Prop. Google Directions	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	App. Full Address	App. Address	App. Town	App. Postcode	App. Move In Date	Land. Company Name
Land. Salutation	Land. Phone	Land. Work phone	Land. Mobile phone	Land. Email	Land. Title	Land. Forename	Land. Surname	Land. Full Address	Land. Address
Land. Postcode	Vend. Company Name	Vend. Salutation	Vend. Phone	Vend. Work phone	Vend. Mobile phone	Vend. Email	Vend. Title	Vend. Forename	Vend. Surname

12

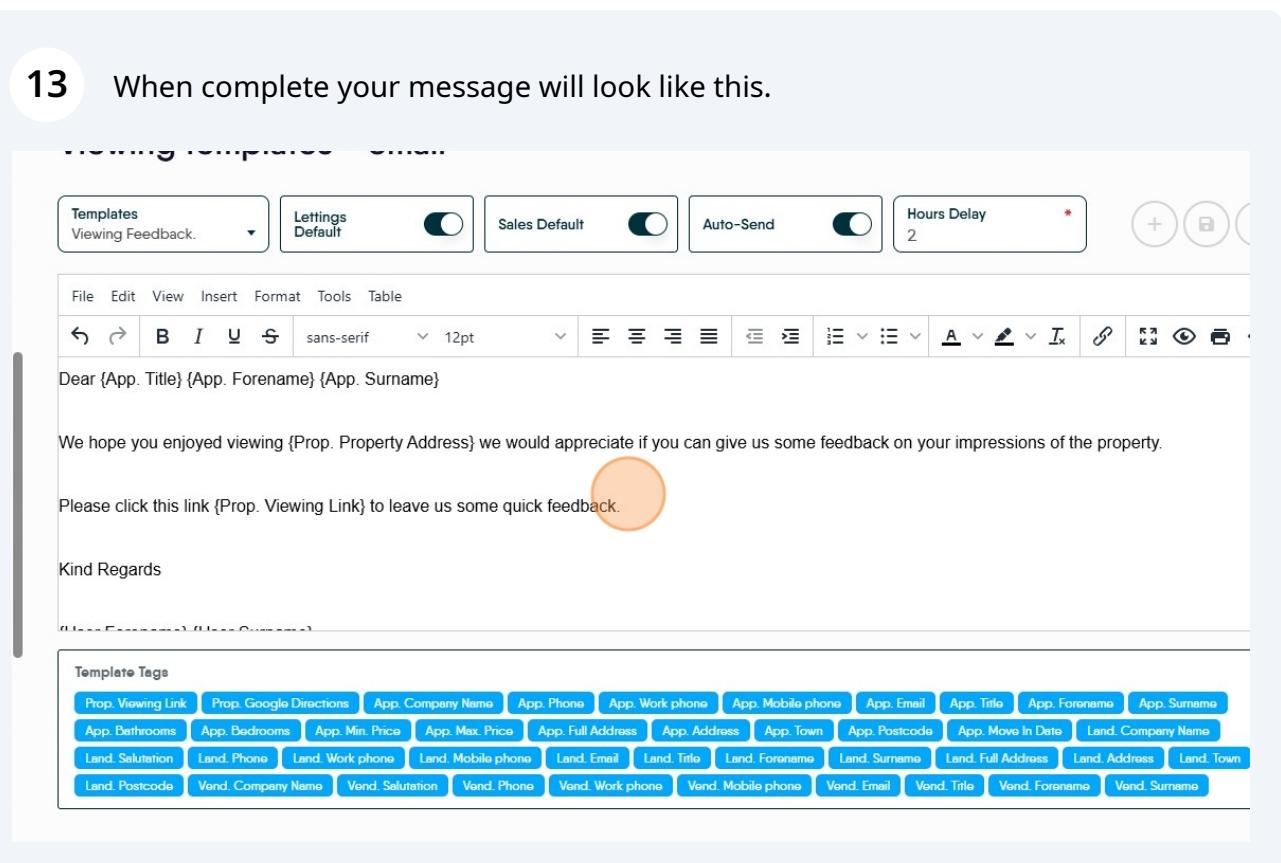
For example click "App. Phone" to add the applicants phone number to the email, or 'Prop Google Directions' to add the google directions to the property etc



The screenshot shows the 'Viewing templates - email' interface. At the top, there are buttons for 'Templates' (set to 'Email Test'), 'Lettings Default' (disabled), 'Sales Default' (disabled), 'Auto-Send' (disabled), and 'Hours Delay' (set to 2). Below these are standard Microsoft Word-like toolbar buttons for file operations, font, and paragraph styles. The main area is labeled 'Edit template here...' and contains a placeholder text 'Edit template here...'. At the bottom, a 'Template Tags' section lists various tags in a grid. The tag 'App. Phone' is highlighted with a red oval, and the entire 'Template Tags' section is also highlighted with a red oval.

13

When complete your message will look like this.



The screenshot shows the completed email template. The message content is as follows:

Dear {App. Title} {App. Forename} {App. Surname}

We hope you enjoyed viewing {Prop. Property Address} we would appreciate if you can give us some feedback on your impressions of the property.

Please click this link {Prop. Viewing Link} to leave us some quick feedback.

Kind Regards

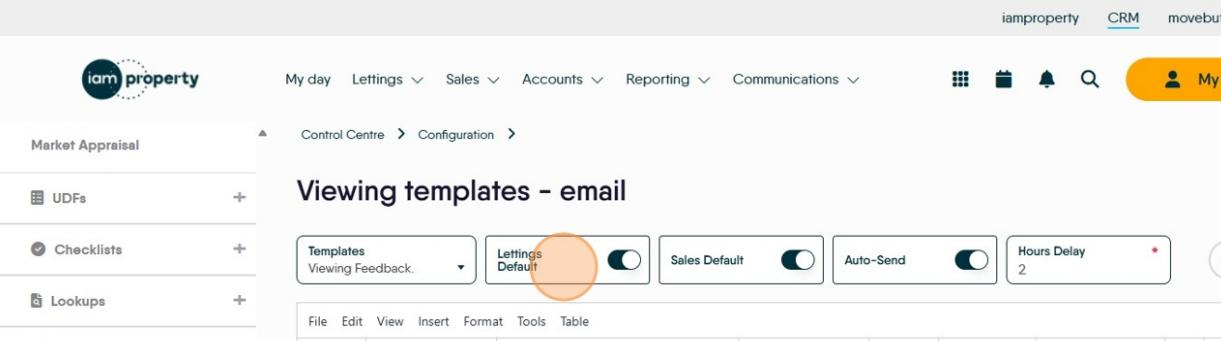
At the bottom, the 'Template Tags' section is shown again, with the 'Prop. Viewing Link' tag highlighted with a red oval.

14

There are a number of options available once the template is created. A separate template can be created for Sales and Lettings templates, templates can be set to Auto Send after a set period. The next slides show where to click to set these options.

15

Click "Lettings Default" to set this template as the default for lettings feedback requests



Market Appraisal

Control Centre > Configuration >

Viewing templates - email

Templates Viewing Feedback. **Lettings Default** Sales Default Auto-Send Hours Delay 2

File Edit View Insert Format Tools Table

Dear {App. Title} {App. Forename} {App. Surname}

We hope you enjoyed viewing {Prop. Property Address} we would appreciate if you can give us some feedback on your impressions of the property

Please click this link {Prop. Viewing Link} to leave us some quick feedback.

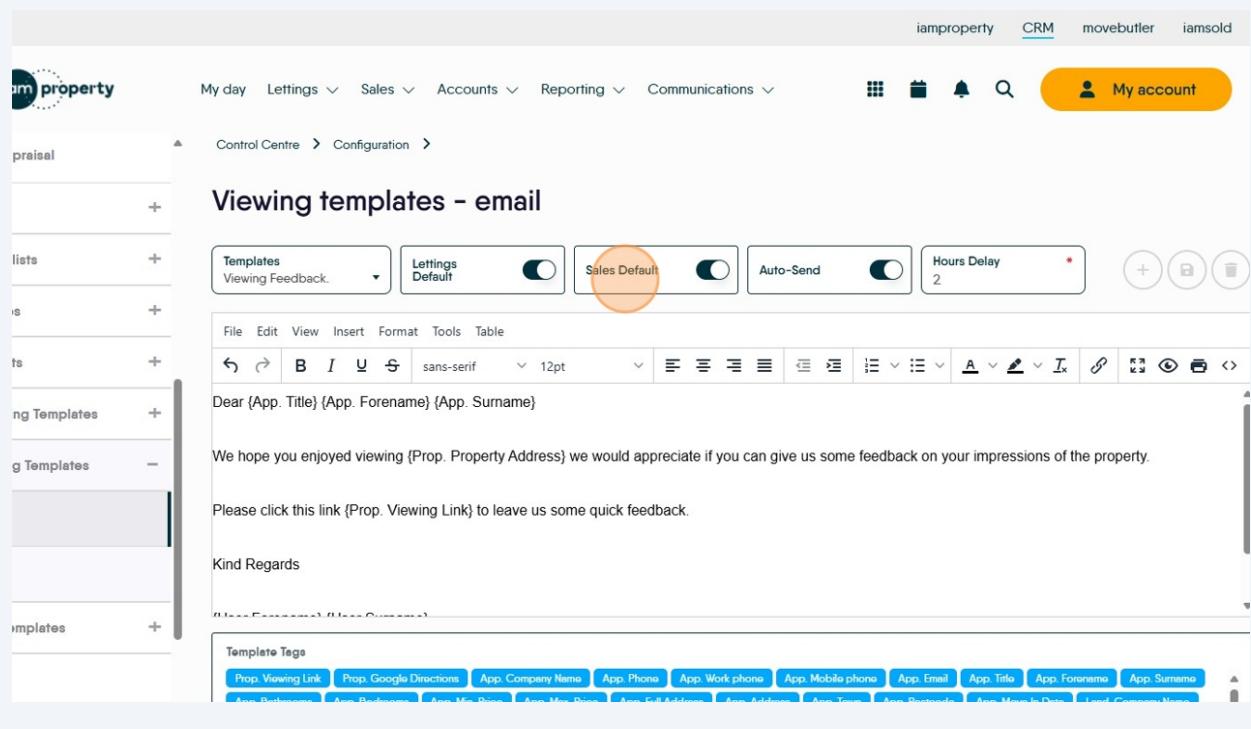
Kind Regards

Template Tags

- Prop. Viewing Link
- Prop. Google Directions
- App. Company Name
- App. Phone
- App. Work phone
- App. Mobile phone
- App. Email
- App. Title
- App. Forename
- App. Lastname
- App. Birthdate
- App. Mar. Status
- App. Mar. Reason
- App. Mar. Next Reason
- App. Cell Address
- App. Address
- App. Town
- App. Postcode
- App. Moving In Date
- App. Gender

16

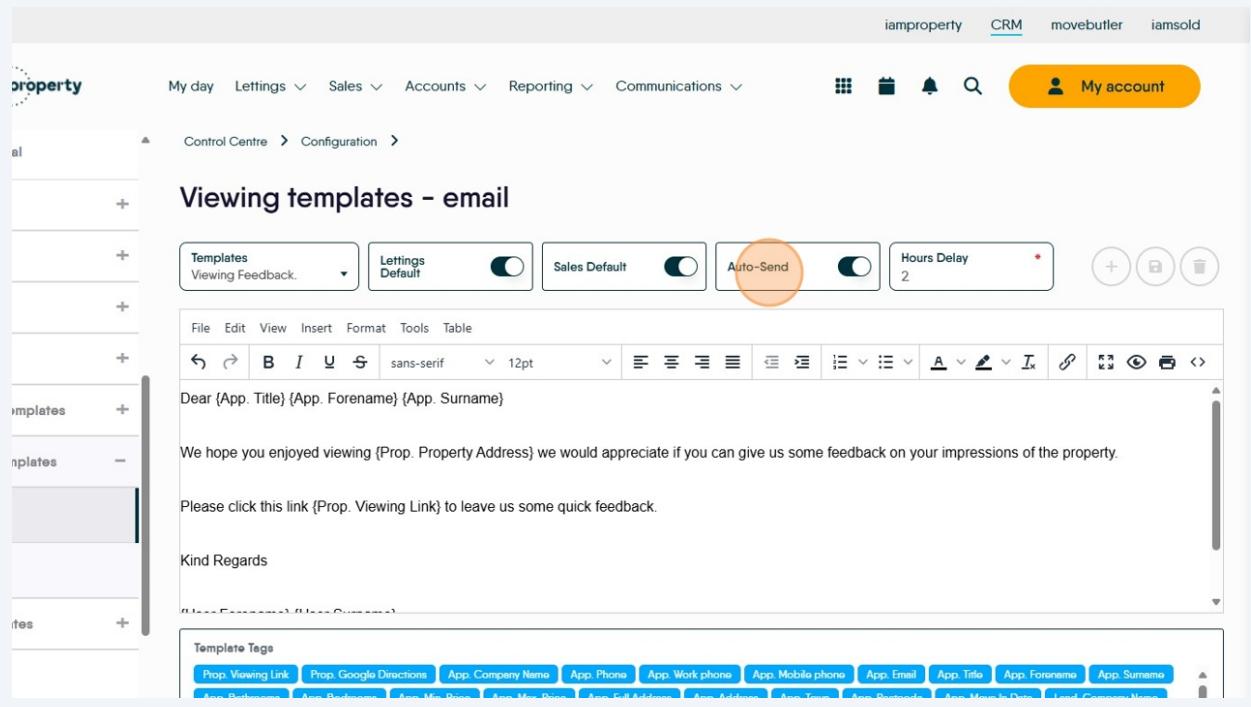
Click "Sales Default" to set this template as the default for Sales feedback requests.



The screenshot shows the iomproperty software interface. At the top, there are navigation links: My day, Lettings, Sales, Accounts, Reporting, Communications, and a search bar. On the right, there are icons for CRM, movebutler, and iamsold, along with a 'My account' button. Below the navigation, the path 'Control Centre > Configuration > Viewing templates - email' is shown. The main area is titled 'Viewing templates - email'. On the left, there is a sidebar with sections like 'lists', 'IS', 'ts', 'ng Templates', 'g Templates', and 'Templates'. The main content area contains a toolbar with 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', and 'Table' options. Below the toolbar is a text editor with a message template: 'Dear {App. Title} {App. Forename} {App. Surname}', 'We hope you enjoyed viewing {Prop. Property Address} we would appreciate if you can give us some feedback on your impressions of the property.', 'Please click this link {Prop. Viewing Link} to leave us some quick feedback.', and 'Kind Regards'. At the bottom, there is a 'Template Tags' section with various tags listed. The 'Sales Default' toggle switch is highlighted with a red circle.

17

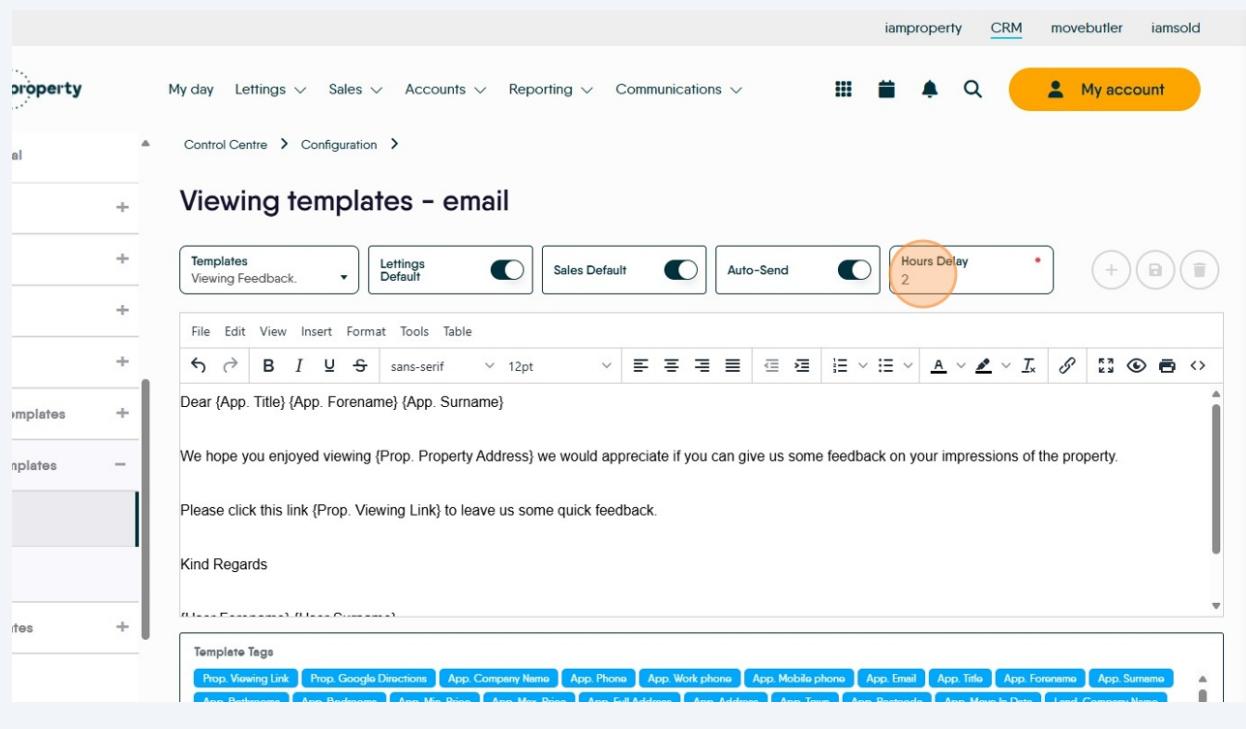
Click "Auto-Send" to enable the templates to be sent automatically.



The screenshot shows the iomproperty software interface, similar to the previous one but with different highlighted buttons. The 'Auto-Send' toggle switch is highlighted with a red circle. The rest of the interface is identical to the previous screenshot, including the navigation bar, sidebar, and template content.

18

Click the "Hours Delay" field. This can be set for any time delay from 1 hour upwards.



My day Lettings Sales Accounts Reporting Communications

Control Centre > Configuration >

Viewing templates - email

Templates Viewing Feedback Lettings Default Sales Default Auto-Send Hours Delay 2

File Edit View Insert Format Tools Table

Dear {App. Title} {App. Forename} {App. Surname}

We hope you enjoyed viewing {Prop. Property Address} we would appreciate if you can give us some feedback on your impressions of the property.

Please click this link {Prop. Viewing Link} to leave us some quick feedback.

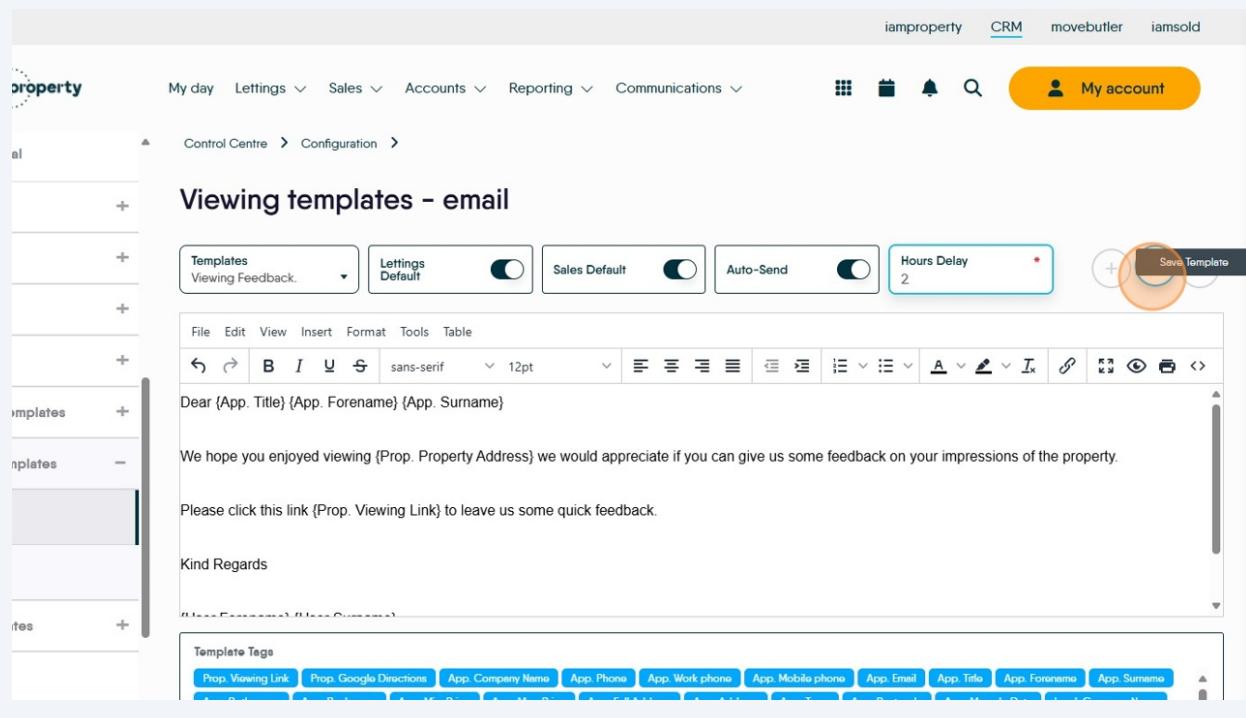
Kind Regards

Template Tags

Prop. Viewing Link Prop. Google Directions App. Company Name App. Phone App. Work phone App. Mobile phone App. Email App. Title App. Forename App. Surname

19

Click here to save.



My day Lettings Sales Accounts Reporting Communications

Control Centre > Configuration >

Viewing templates - email

Templates Viewing Feedback Lettings Default Sales Default Auto-Send Hours Delay 2

File Edit View Insert Format Tools Table

Dear {App. Title} {App. Forename} {App. Surname}

We hope you enjoyed viewing {Prop. Property Address} we would appreciate if you can give us some feedback on your impressions of the property.

Please click this link {Prop. Viewing Link} to leave us some quick feedback.

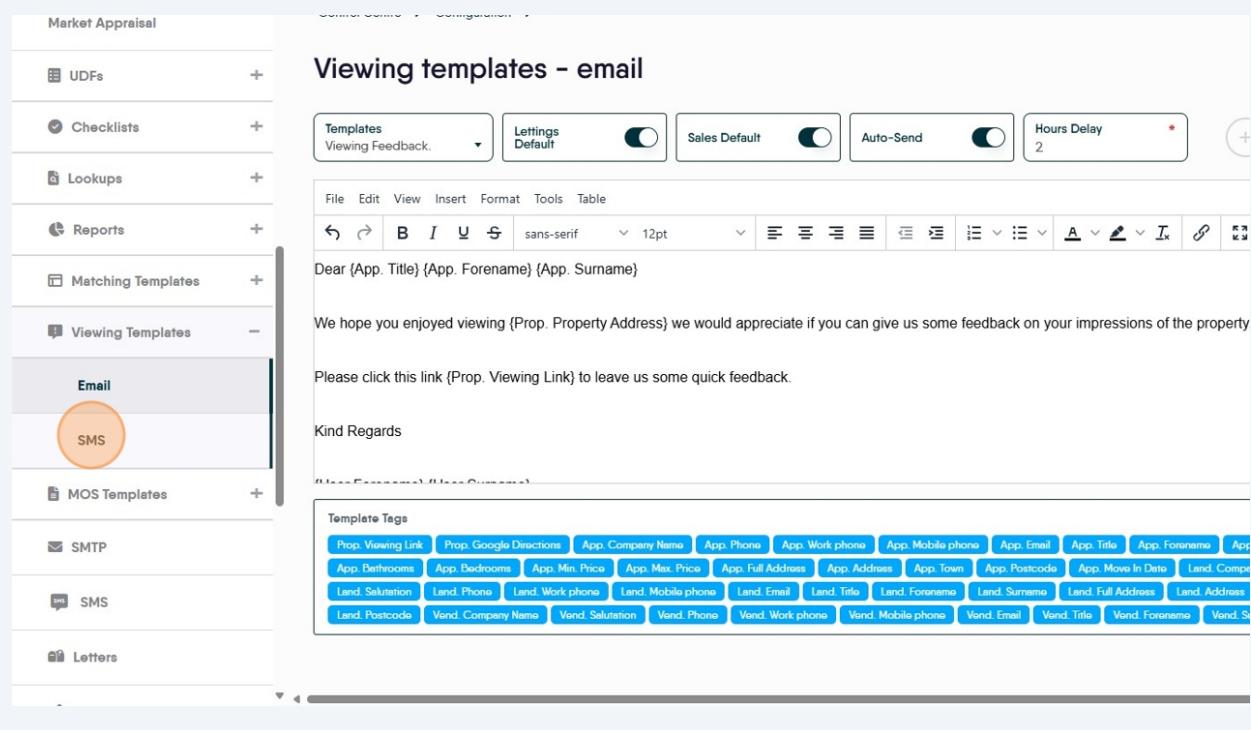
Kind Regards

Template Tags

Prop. Viewing Link Prop. Google Directions App. Company Name App. Phone App. Work phone App. Mobile phone App. Email App. Title App. Forename App. Surname

SMS Message templates

20 Click "SMS"



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Viewing templates - email

Templates Viewing Feedback. Lettings Default Sales Default Auto-Send Hours Delay 2

File Edit View Insert Format Tools Table

Dear {App. Forename} {App. Surname}

We hope you enjoyed viewing {Prop. Property Address} we would appreciate if you can give us some feedback on your impressions of the property

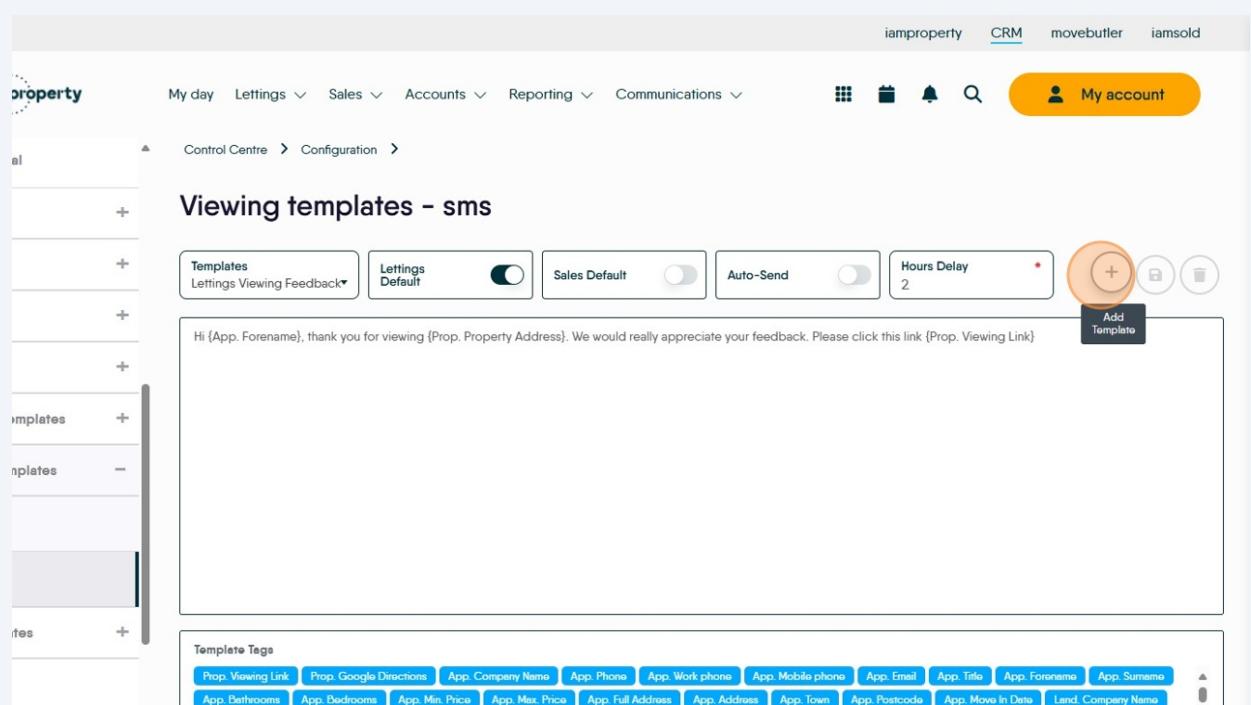
Please click this link {Prop. Viewing Link} to leave us some quick feedback.

Kind Regards

Template Tags

Prop. Viewing Link Prop. Google Directions 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 App. Full Address App. Address App. Town App. Postcode App. Move In Date Land. Company Name Land. Saturation Land. Phone Land. Work phone Land. Mobile phone Land. Email Land. Title Land. Forename Land. Surname Land. Full Address Land. Address Land. Postcode Vend. Company Name Vend. Saturation Vend. Phone Vend. Work phone Vend. Mobile phone Vend. Email Vend. Title Vend. Forename Vend. Surname

21 Click here to add the new template.



My day Lettings Sales Accounts Reporting Communications

Control Centre > Configuration

Viewing templates - sms

Templates Lettings Viewing Feedback Lettings Default Sales Default Auto-Send Hours Delay 2

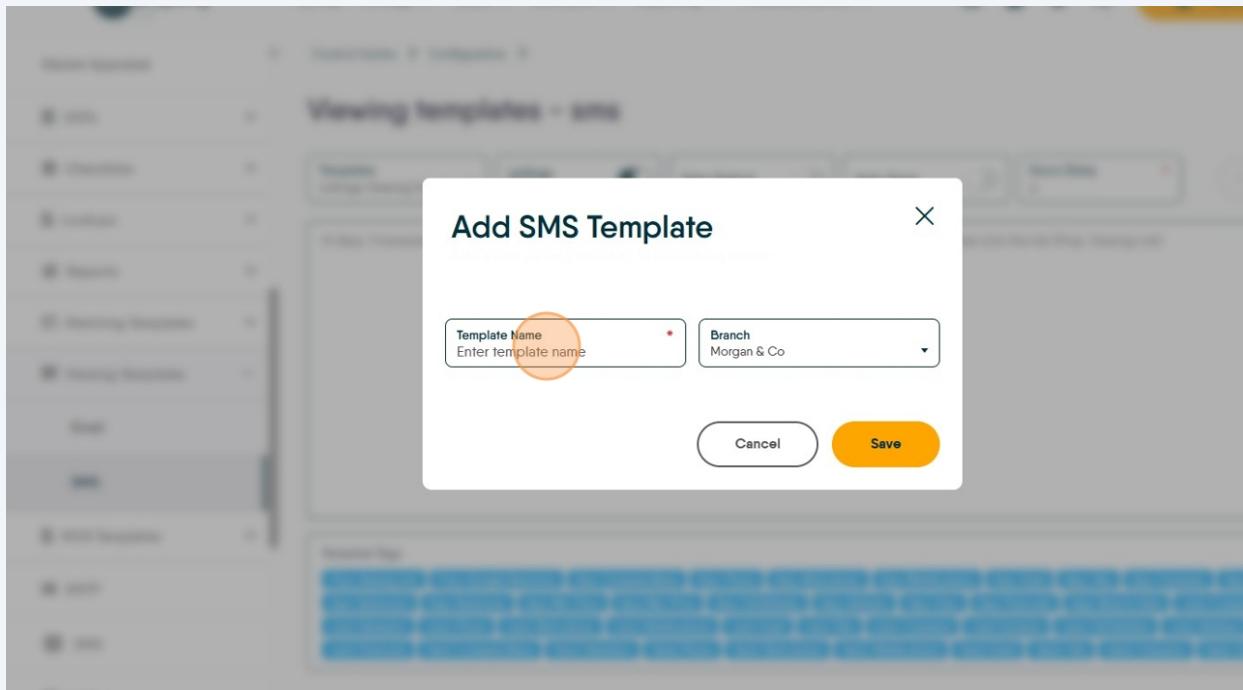
Hi {App. Forename}, thank you for viewing {Prop. Property Address}. We would really appreciate your feedback. Please click this link {Prop. Viewing Link}

Add Template

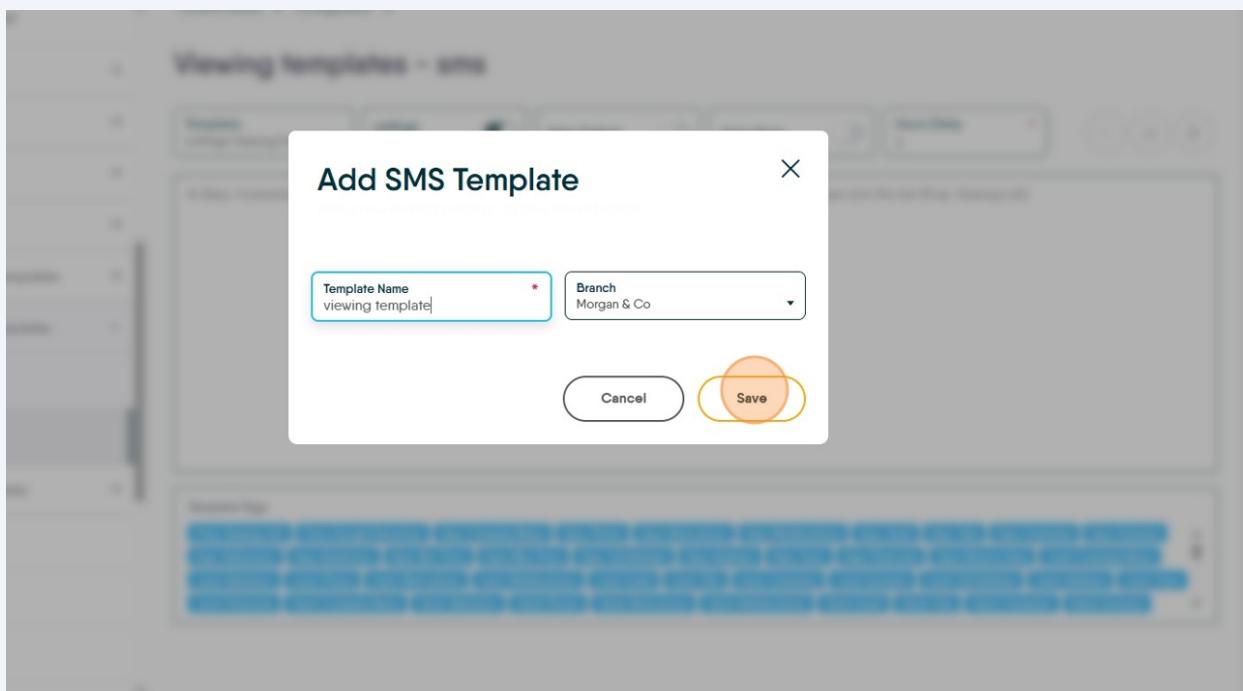
Template Tags

Prop. Viewing Link Prop. Google Directions 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 App. Full Address App. Address App. Town App. Postcode App. Move In Date Land. Company Name Land. Saturation Land. Phone Land. Work phone Land. Mobile phone Land. Email Land. Title Land. Forename Land. Surname Land. Full Address Land. Address Land. Postcode Vend. Company Name Vend. Saturation Vend. Phone Vend. Work phone Vend. Mobile phone Vend. Email Vend. Title Vend. Forename Vend. Surname

22 Click the "Template Name" field name the template.



23 Click "Save"



24

Click the "Edit template here..." field. Add the text and use the template tags to personalise the message.

Market Appraisal

Control Centre > Configuration >

Viewing templates - sms

Templates Lettings Viewing Feedback

Lettings Default

Sales Default

Auto-Send

Hours Delay 2

Hi {App. Forename}, thank you for viewing {Prop. Property Address}. We would really appreciate your feedback. Please click this link {Prop. Viewing Link}

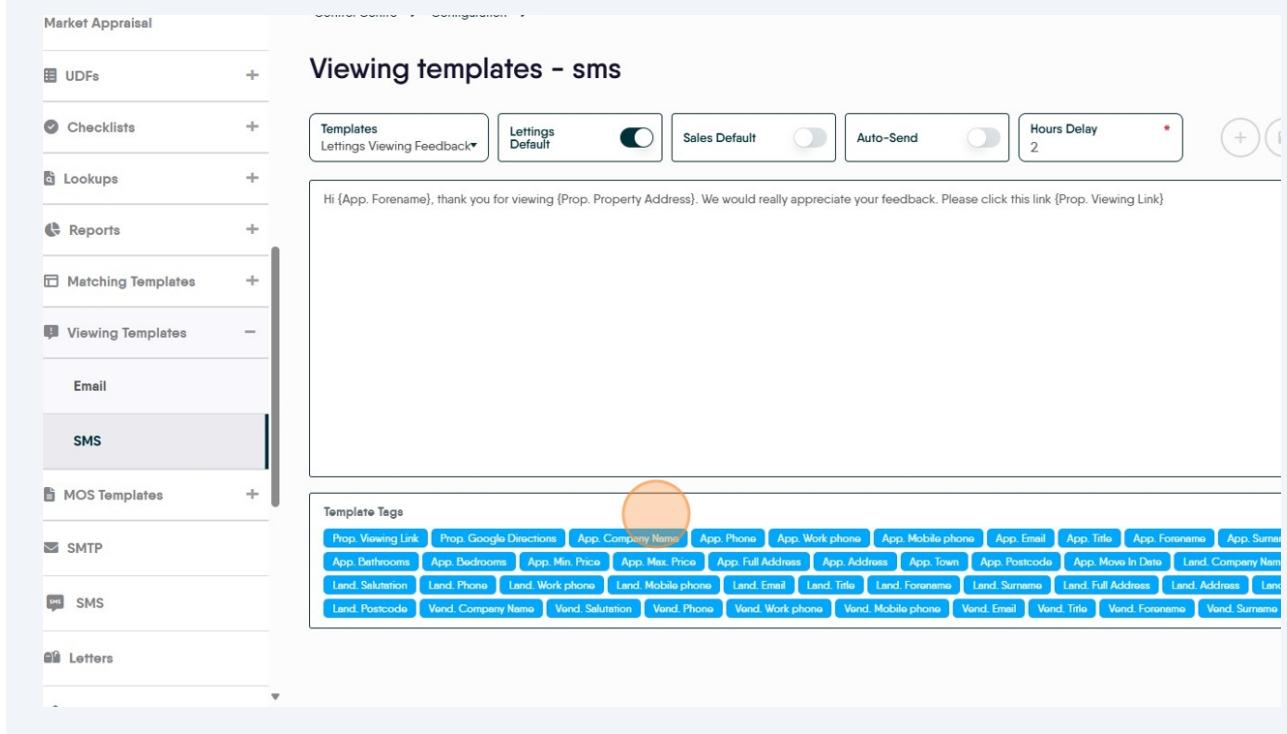
Template Tags

Prop. Viewing Link Prop. Google Directions App. Company Name App. Phone App. Work phone App. Mobile phone App. Email App. Title App. Forename App. App. Bedrooms App. Bedrooms App. Min. Price App. Max. Price App. Full Address App. Address App. Town App. Postcode App. Move In Date Land. Compr



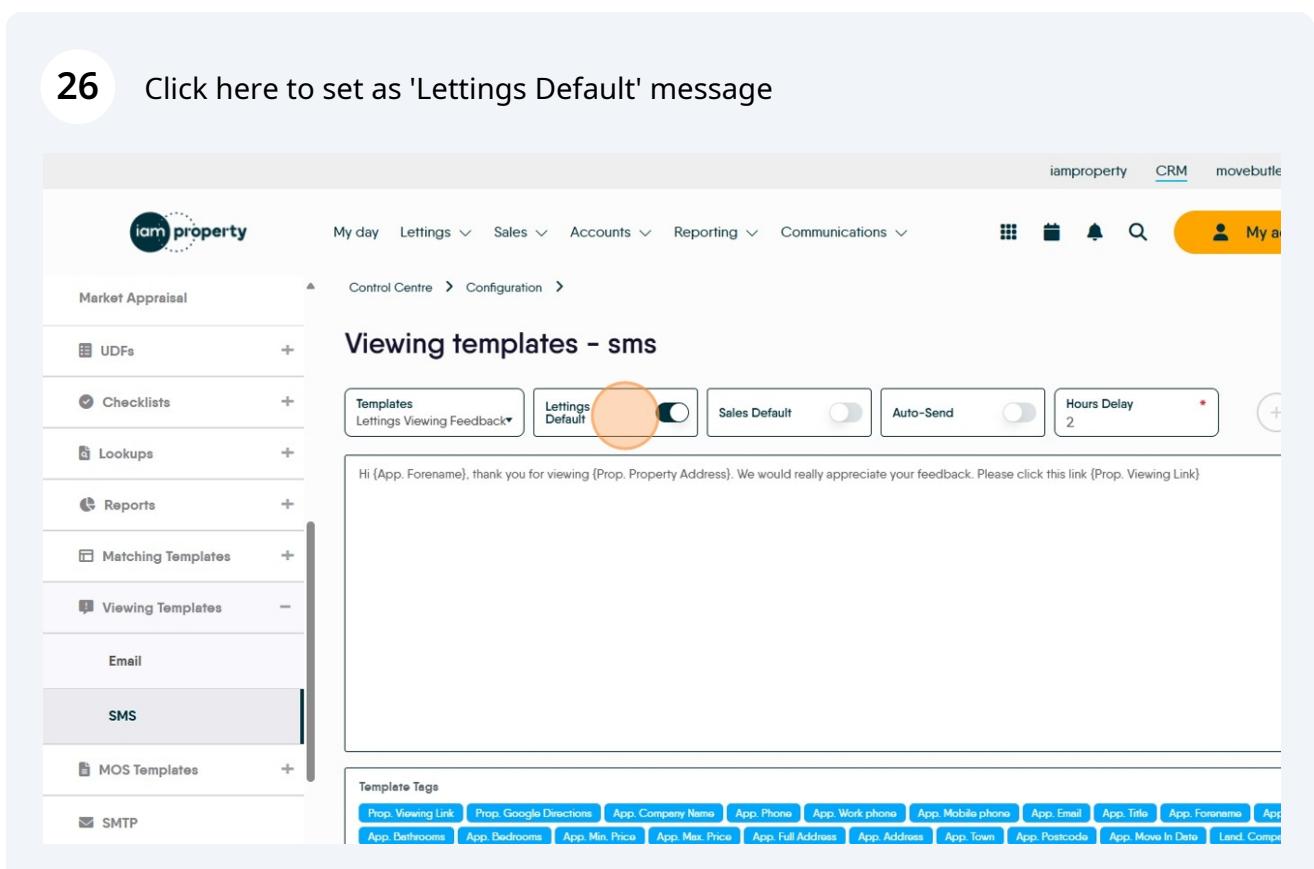
Alert! Be aware SMS messages are limited to 160 characters, so be brief. Over 160 characters a second message will be sent etc.

25 Click "Template Tags" to use the template tags.



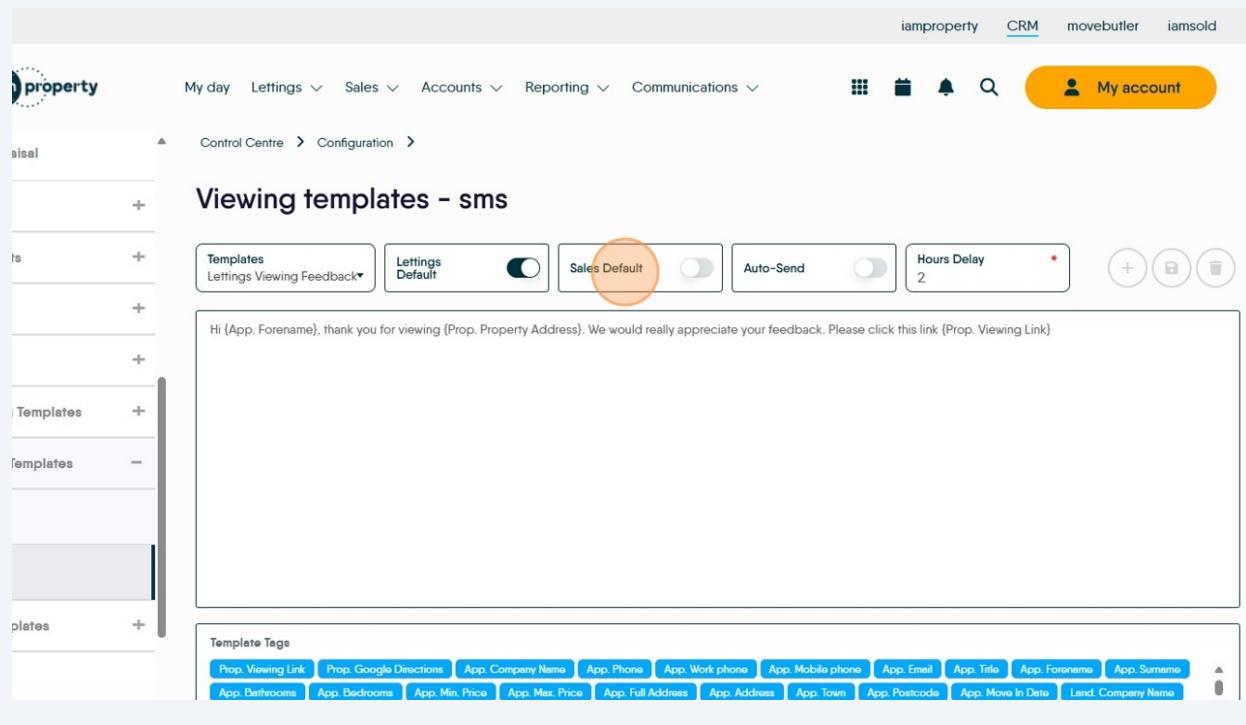
The screenshot shows the 'Viewing templates - sms' screen. On the left, there is a sidebar with various categories: UDFs, Checklists, Lookups, Reports, Matching Templates, Viewing Templates, Email, SMS, MOS Templates, SMTP, and Letters. The 'SMS' category is currently selected. In the main area, there is a 'Templates' section with a dropdown menu set to 'Lettings Viewing Feedback'. Below this are several toggle switches: 'Lettings Default' (which is turned on, indicated by an orange circle), 'Sales Default' (off), 'Auto-Send' (off), and 'Hours Delay' set to 2. A 'Template Tags' section contains a long list of tags, with the 'Lettings Default' switch highlighted by an orange circle. The list includes tags like Prop. Viewing Link, Prop. Google Directions, 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, App. Full Address, App. Address, App. Town, App. Postcode, App. Move In Date, Land. Company Name, Land. Salutation, Land. Phone, Land. Work phone, Land. Mobile phone, Land. Email, Land. Title, Land. Forename, Land. Surname, Land. Full Address, Land. Address, Land. Postcode, Vend. Company Name, Vend. Salutation, Vend. Phone, Vend. Work phone, Vend. Mobile phone, Vend. Email, Vend. Title, Vend. Forename, Vend. Surname.

26 Click here to set as 'Lettings Default' message



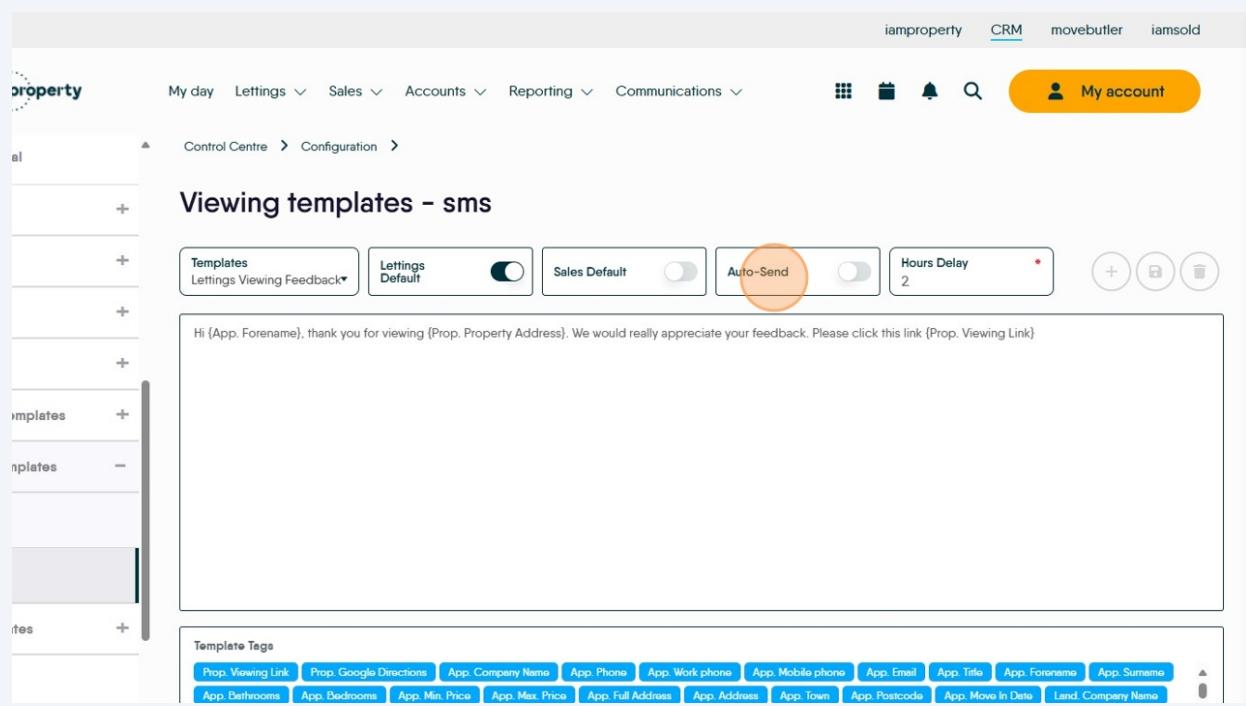
The screenshot shows the 'Viewing templates - sms' screen. The layout is identical to the previous one, with the 'SMS' category selected in the sidebar. In the main area, the 'Lettings Default' toggle switch is shown with an orange circle around it, indicating it is being clicked. The rest of the interface, including the 'Templates' dropdown, other toggle switches, and the 'Template Tags' list, remains the same as in the previous screenshot.

27 Click "Sales Default" to set as the default sales message.



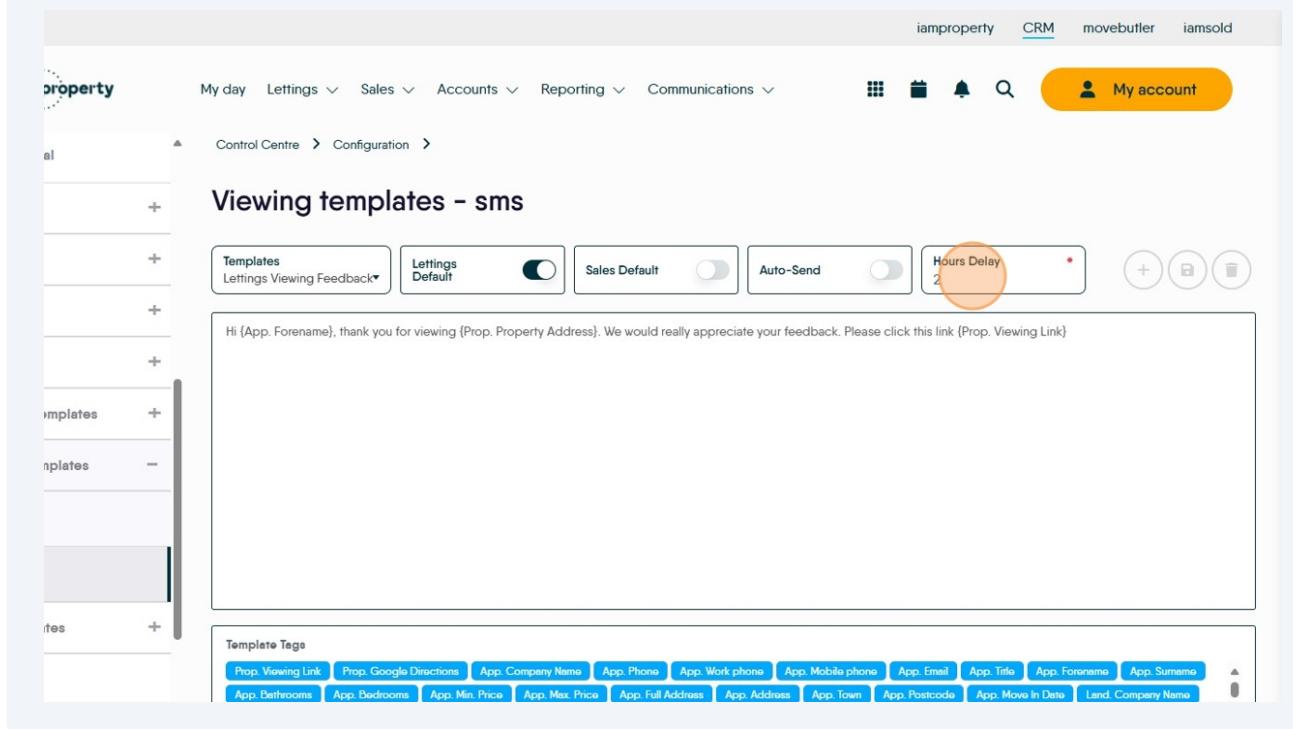
The screenshot shows the iamsold software interface. At the top, there are navigation links: 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications'. On the right, there are icons for 'iamproperty', 'CRM', 'movebutler', 'iamsold', and a 'My account' button. Below the navigation, the path 'Control Centre > Configuration >' is visible. The main title is 'Viewing templates - sms'. On the left, there is a sidebar with sections for 'Templates' (Lettings Viewing Feedback, Lettings Default, Sales Default, Auto-Send, Hours Delay 2). The 'Sales Default' section is highlighted with an orange circle. Below the sidebar is a large text area containing a template message: 'Hi {App. Forename}, thank you for viewing {Prop. Property Address}. We would really appreciate your feedback. Please click this link {Prop. Viewing Link}'. At the bottom, there is a 'Template Tags' section with many tags listed, and a 'Template Tags' button.

28 Click "Auto-Send" to send the message automatically.



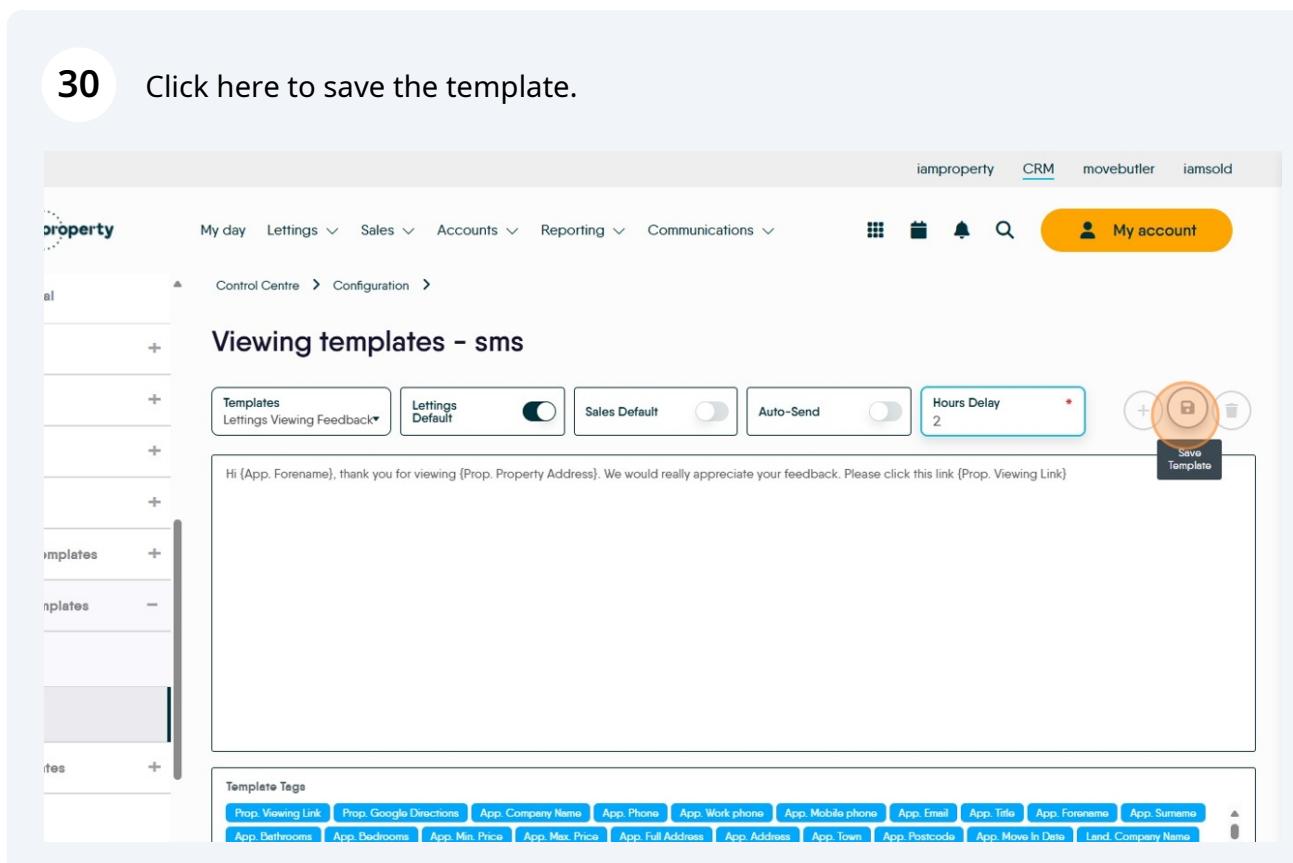
The screenshot shows the iamsold software interface, identical to the previous one but with a different configuration. The 'Sales Default' toggle switch is now off (gray), and the 'Auto-Send' toggle switch is highlighted with an orange circle. The rest of the interface, including the template message and the 'Template Tags' section, remains the same.

29 Click the "Hours Delay" field to set the time delay, from 1 hour upwards.



The screenshot shows the 'Viewing templates - sms' page. At the top, there are several configuration options: 'Templates' (selected), 'Lettings Default' (on), 'Sales Default' (off), 'Auto-Send' (off), and 'Hours Delay' (set to 2). The 'Hours Delay' field is highlighted with a red circle. Below these options is a preview window containing a message: 'Hi {App. Forename}, thank you for viewing {Prop. Property Address}. We would really appreciate your feedback. Please click this link {Prop. Viewing Link}'. At the bottom of the page is a 'Template Tags' section with a list of available tags, and a 'Save' button is highlighted with a red circle.

30 Click here to save the template.



The screenshot shows the 'Viewing templates - sms' page. The 'Hours Delay' field is highlighted with a red circle and contains the value '2'. Below the preview window is a 'Template Tags' section with a list of available tags. At the bottom right of the page is a 'Save' button, which is highlighted with a red circle.