

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>

The screenshot shows the 'MyDay' dashboard in the iam property CRM. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main heading is 'Welcome back, Training'. Below this are three links: 'Add New Record', 'View property management', and 'Visit help centre'. A search bar is present with the text 'Search all records'. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'.

Today's events

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

My tasks

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
Not Started	Clean Windows	High	28/Jan/2025	28/Jan/2025

2 Click "My account"

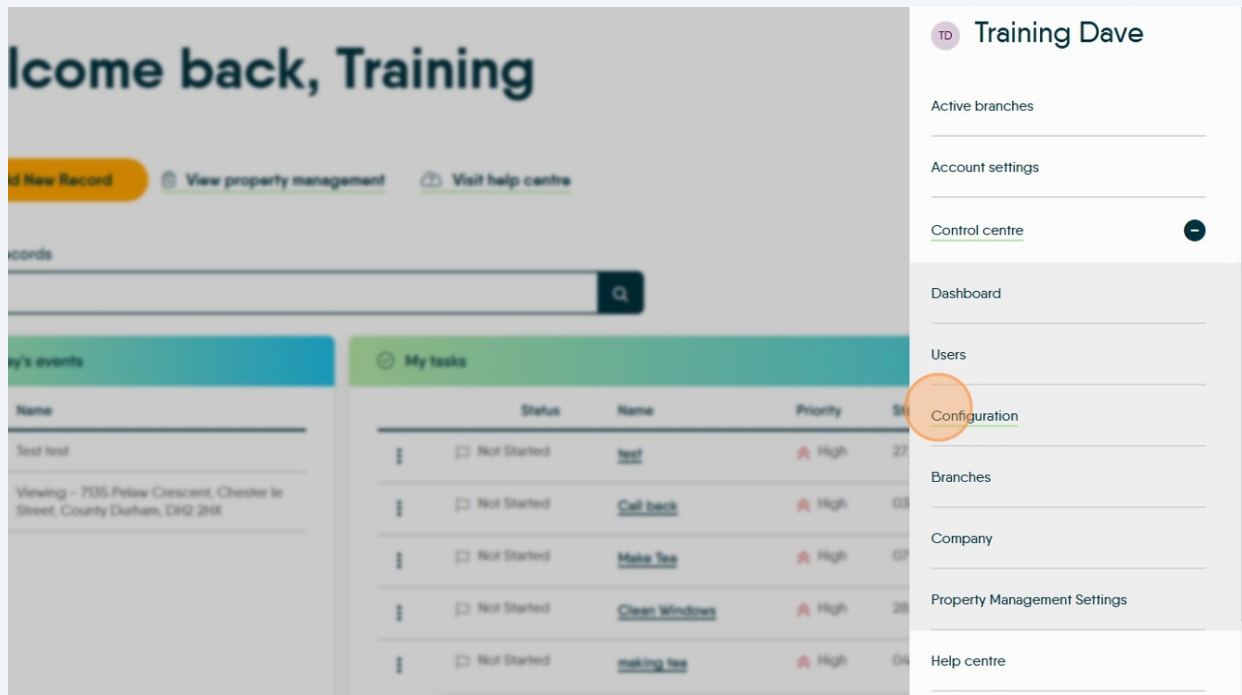
The screenshot shows the iamproperty CRM dashboard. The top navigation bar includes links for iamproperty, CRM, movebutler, and iamsold. Below this, a secondary navigation bar contains 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. On the right side of this bar, there are icons for a grid, calendar, notifications, and search, followed by a 'My account' button which is highlighted with an orange circle. The main content area features a large 'Welcome back, Training' heading. Below the heading are three links: 'Add New Record', 'View property management', and 'Visit help centre'. A search bar is present below these links. The dashboard is divided into two main sections: 'My events' on the left and 'My tasks' on the right. The 'My tasks' section contains a table with the following data:

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

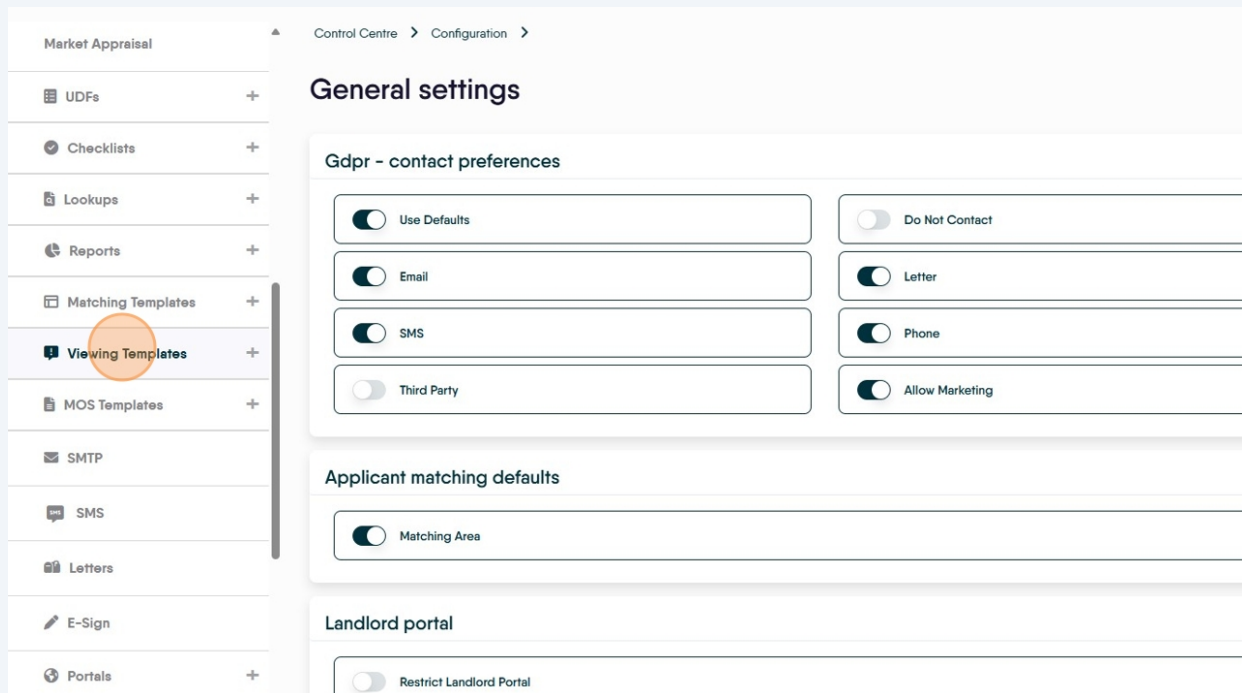
3 Click "Control centre"

The screenshot shows the iamproperty CRM dashboard with the 'My account' button highlighted in the top right navigation bar. The main content area is partially obscured by a sidebar on the right. The sidebar displays the user's name 'Training Dave' and a list of options: 'Active branches', 'Account settings', 'Control centre', 'Help centre', and 'Log out'. The 'Control centre' option is highlighted with an orange circle. The background of the dashboard shows the same 'Welcome back, Training' heading and navigation elements as the previous screenshot.

4 Click "Configuration"



5 Click "Viewing templates"



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

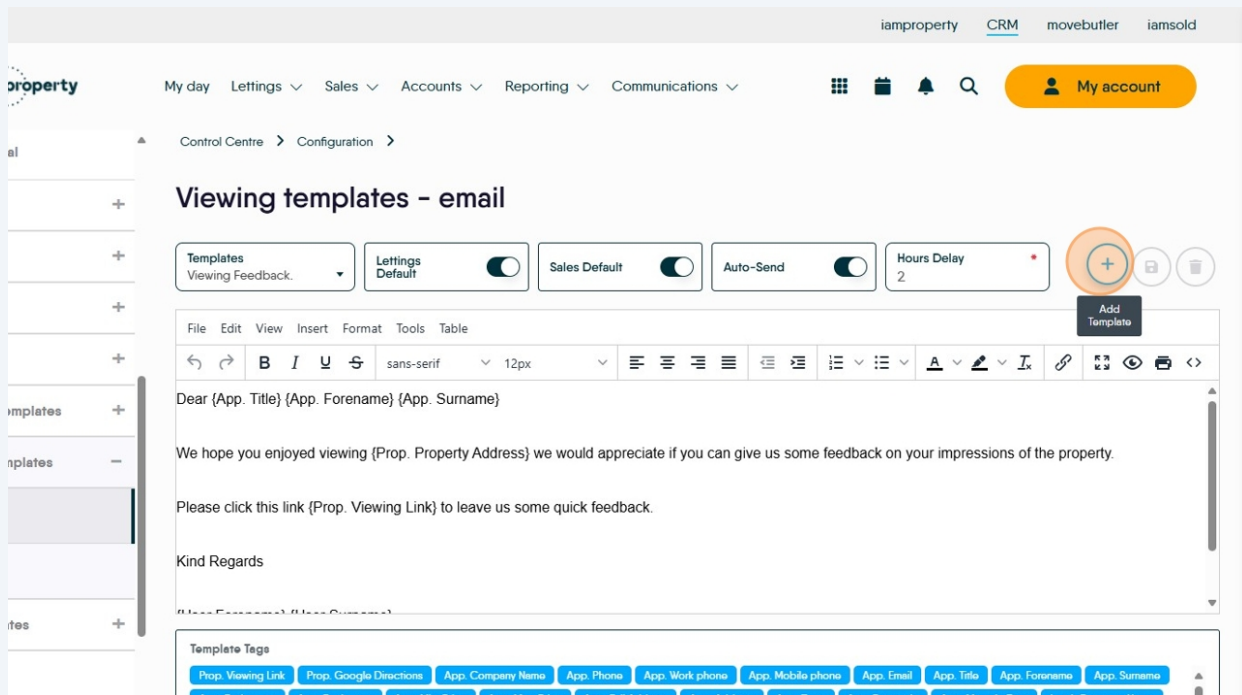
7

Click "Email"

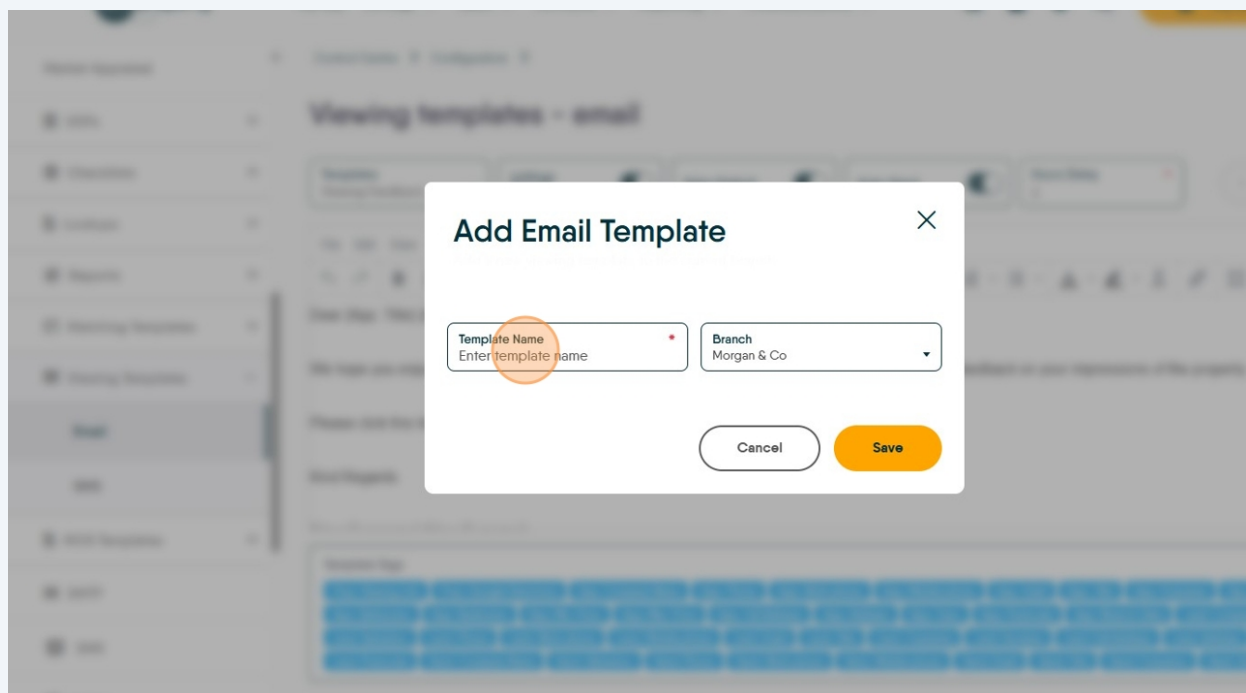
The screenshot shows the 'General settings' page. On the left is a sidebar menu with the following items: Market Appraisal, UDFs, Checklists, Lookups, Reports, Matching Templates, Viewing Templates, Email (highlighted with an orange circle), SMS, MOS Templates, SMTP, SMS, and Letters. The main content area is titled 'General settings' and contains three sections:

- Gdpr - contact preferences**: This section contains two columns of toggle switches. The first column has 'Use Defaults' (checked), 'Email' (checked), 'SMS' (checked), and 'Third Party' (unchecked). The second column has 'Do Not Contact' (unchecked), 'Letter' (checked), 'Phone' (checked), and 'Allow Marketing' (checked).
- Applicant matching defaults**: This section contains one toggle switch, 'Matching Area', which is checked.
- Landlord portal**: This section contains one toggle switch, 'Restrict Landlord Portal', which is unchecked.

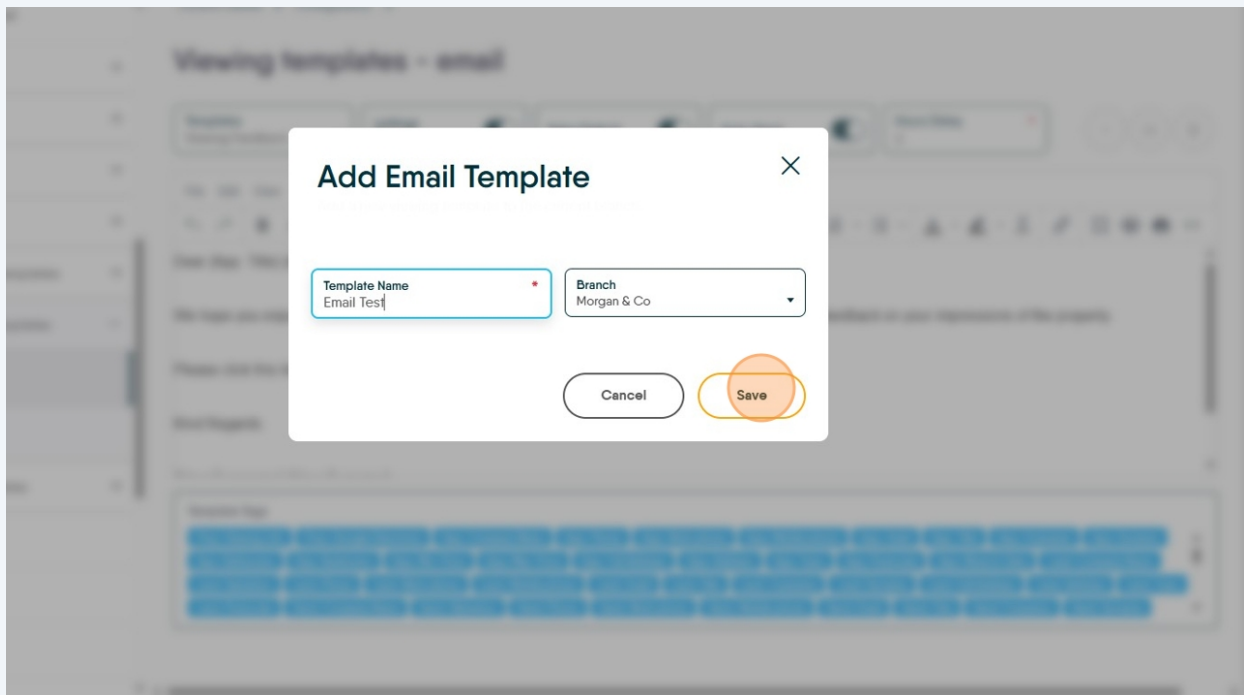
8 To create a new Template click here.



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

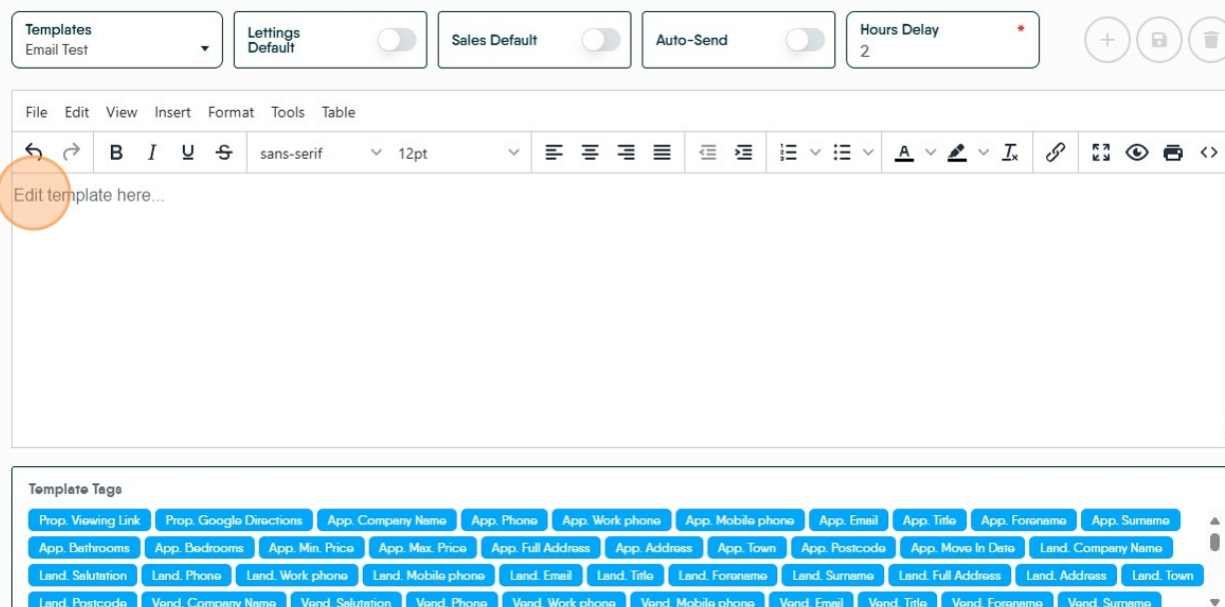


10 Click "Save"



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



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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

Viewing templates - email

Templates: Email Test | Lettings Default: ☐ | Sales Default: ☐ | Auto-Send: ☐ | Hours Delay: 2

File Edit View Insert Format Tools Table

↶ ↷ B I U sans-serif 12pt

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

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When complete your message will look like this.

Viewing templates - email

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

File Edit View Insert Format Tools Table

↶ ↷ B I U sans-serif 12pt

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

{App. Forename} {App. Surname}

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

14

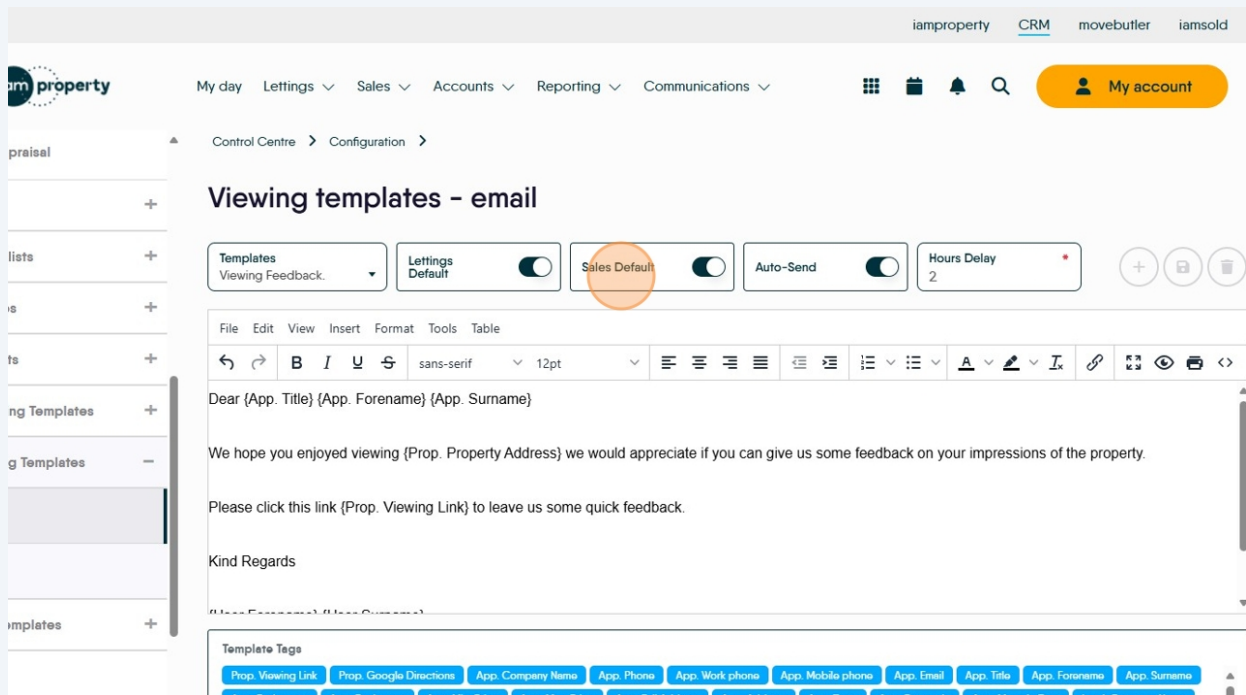
There are a number of options available once the template is created. A separate template can be created for Sales and Lettings templates, templates can be set to Auto Send after a set period. The next slides show where to click to set these options.

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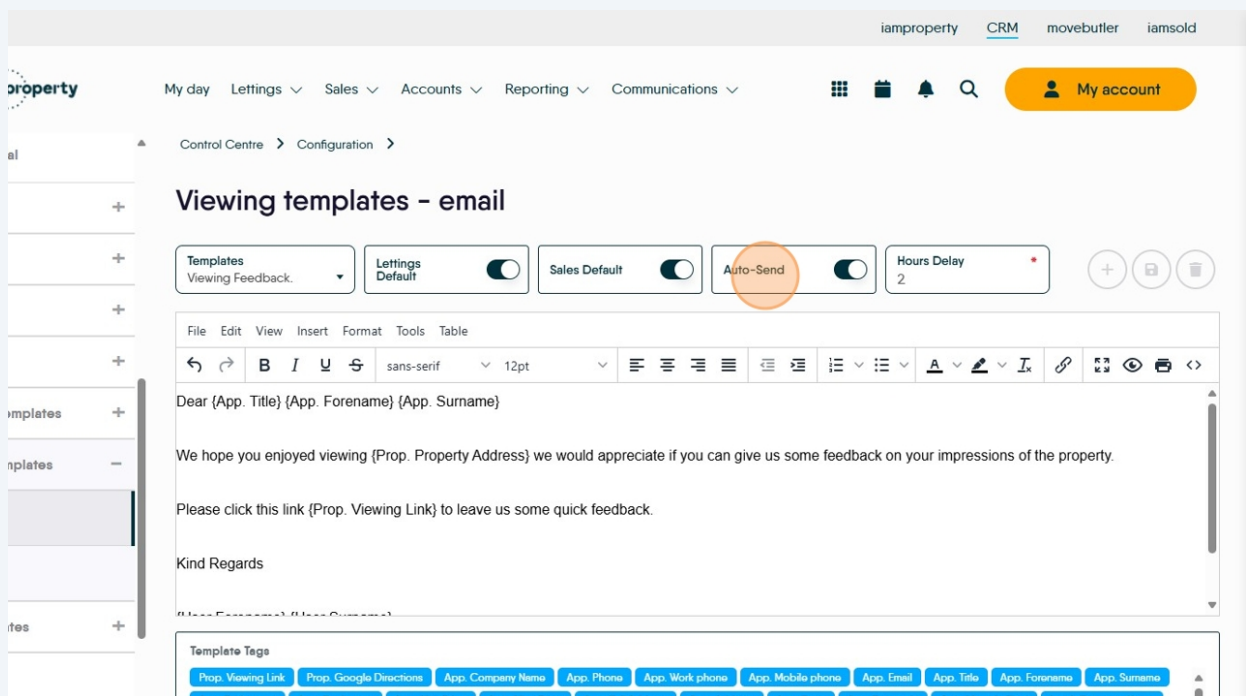
Click "Lettings Default" to set this template as the default for lettings feedback requests

The screenshot shows the 'iamproperty' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar lists various tools like 'Market Appraisal', 'UDFs', 'Checklists', 'Lookups', 'Reports', 'Matching Templates', 'Viewing Templates', 'Email', 'SMS', 'MOS Templates', and 'SMTP'. The main content area is titled 'Viewing templates - email' and contains several configuration options: 'Templates' (set to 'Viewing Feedback'), 'Lettings Default' (highlighted with an orange circle), 'Sales Default', 'Auto-Send', and 'Hours Delay' (set to 2). Below these options is a rich text editor with a toolbar and a preview of the email template content, which includes placeholders for property details and a feedback link. At the bottom, there is a 'Template Tags' section listing various variables like '{Prop. Viewing Link}', '{Prop. Google Directions}', etc.

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



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



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

The screenshot shows the 'Viewing templates - email' configuration page in the 'property' CRM. The page has a top navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A sidebar on the left lists various templates. The main content area is titled 'Viewing templates - email' and includes several toggle switches: 'Templates' (set to 'Viewing Feedback'), 'Lettings Default', 'Sales Default', and 'Auto-Send'. The 'Hours Delay' field is highlighted with an orange circle and contains the value '2'. Below these settings is a rich text editor with a toolbar and a preview of the email template. The preview text includes placeholders for property details and a feedback link. At the bottom, there is a 'Template Tags' section with various tags like 'Prop. Viewing Link', 'Prop. Google Directions', etc.

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Click here to save.

This screenshot is identical to the one above, showing the 'Viewing templates - email' configuration page. In this view, the 'Save Template' button, located to the right of the 'Hours Delay' field, is highlighted with an orange circle. The 'Hours Delay' field still contains the value '2'.

SMS Message templates

20 Click "SMS"

Market Appraisal

- UDFs
- Checklists
- Lookups
- Reports
- Matching Templates
- Viewing Templates
- Email**
- SMS**
- MOS Templates
- SMTP
- SMS
- Letters

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

Hi {App. Forename},

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. Bedrooms	App. Bathrooms	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

21 Click here to add the new template.

property

My day Lettings Sales Accounts Reporting Communications

Control Centre > Configuration >

Viewing templates - sms

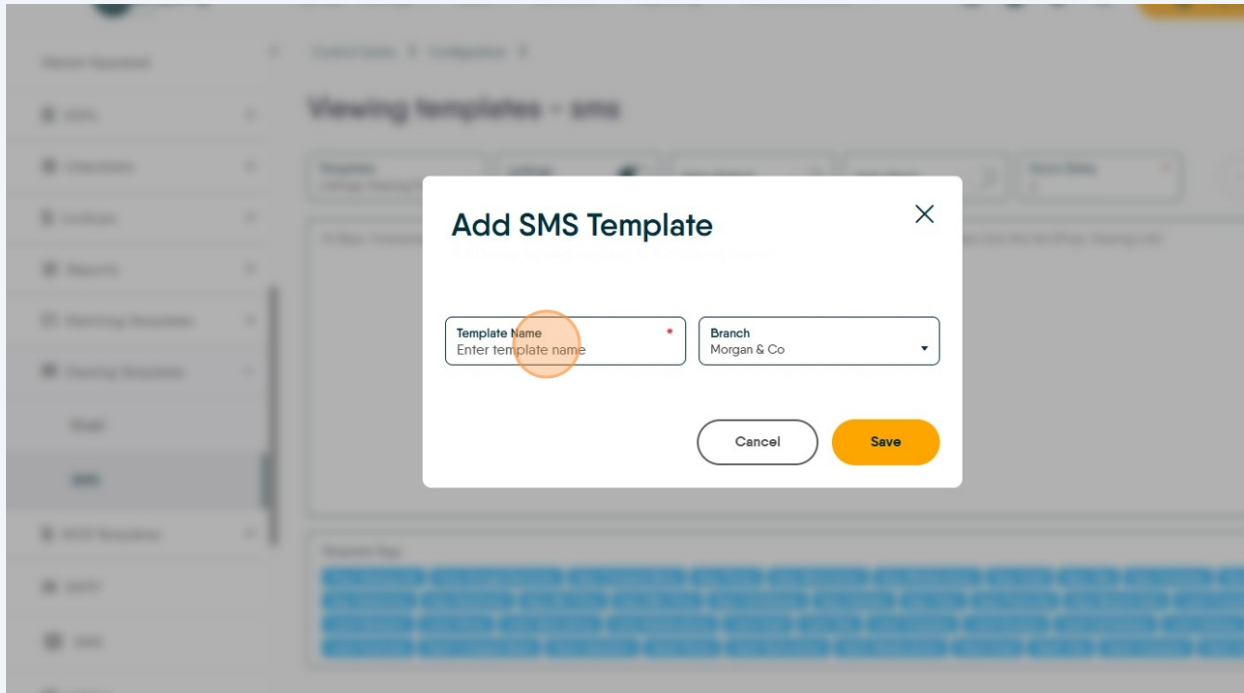
Templates: Lettings Viewing Feedback. Lettings Default. Sales Default. Auto-Send. Hours Delay: 2.

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

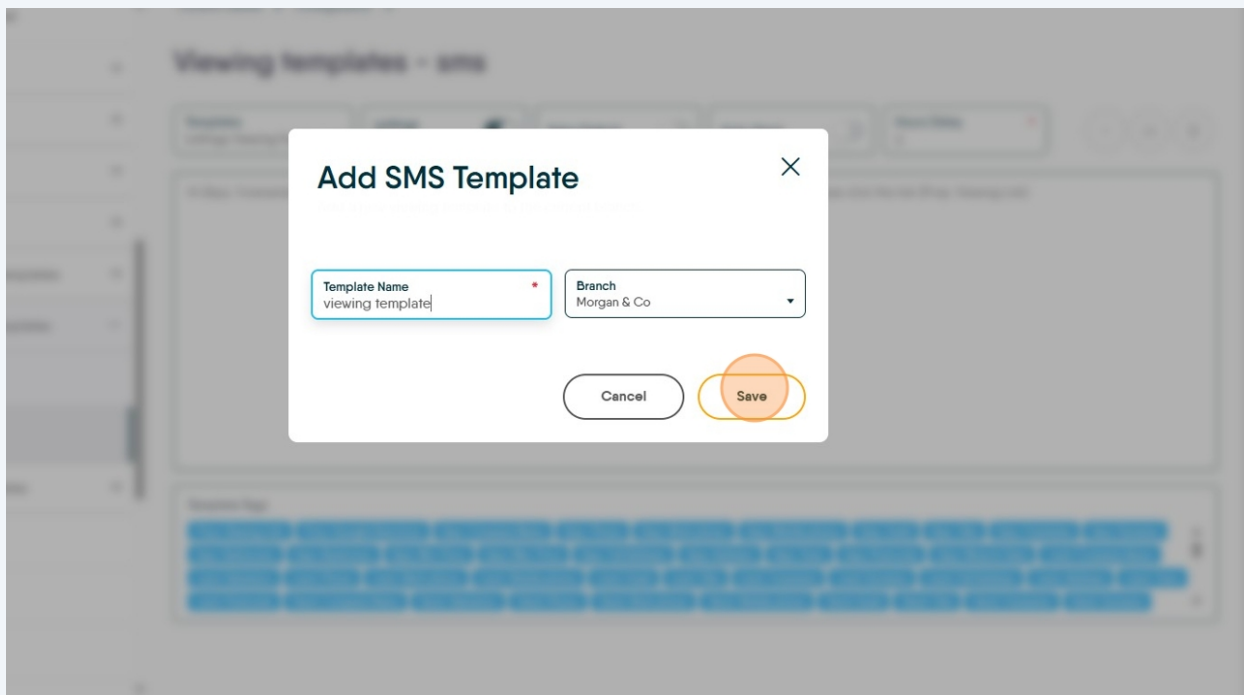
Template Tags

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. Bedrooms	App. Bathrooms	App. Min. Price	App. Max. Price	App. Full Address	App. Address	App. Town	App. Postcode	App. Move In Date	Land. Company Name

- 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.



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.

Market Appraisal

- UDFs
- Checklists
- Lookups
- Reports
- Matching Templates
- Viewing Templates
- Email
- SMS**
- MOS Templates
- SMTP
- SMS
- Letters

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. Surname}
{App. Bedrooms}	{App. Bathrooms}	{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}	{Vand. Company Name}	{Vand. Salutation}	{Vand. Phone}	{Vand. Work phone}	{Vand. Mobile phone}	{Vand. Email}	{Vand. Title}	{Vand. Forename}	{Vand. Surname}

26 Click here to set as 'Lettings Default' message

iamproperty CRM movebutle

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}

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. Bedrooms}	{App. Bathrooms}	{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}	{Vand. Company Name}	{Vand. Salutation}	{Vand. Phone}	{Vand. Work phone}	{Vand. Mobile phone}	{Vand. Email}	{Vand. Title}	{Vand. Forename}	{Vand. Surname}

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

The screenshot shows the 'Viewing templates - sms' configuration page in the 'iamproperty' CRM. The page has a top navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A sidebar on the left contains a list of templates. The main content area has a title 'Viewing templates - sms' and a configuration section with several toggle switches: 'Lettings Default' (checked), 'Sales Default' (unchecked and highlighted with an orange circle), 'Auto-Send' (unchecked), and 'Hours Delay' (set to 2). Below the toggles is a text area containing a placeholder 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 a list of tags including '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. Bedrooms', 'App. Bathrooms', 'App. Min. Price', 'App. Max. Price', 'App. Full Address', 'App. Address', 'App. Town', 'App. Postcode', 'App. Move In Date', and 'Land. Company Name'.

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

The screenshot shows the 'Viewing templates - sms' configuration page in the 'iamproperty' CRM, similar to the previous one. In this view, the 'Auto-Send' toggle switch is highlighted with an orange circle, indicating it should be clicked to enable automatic sending. The rest of the page, including the navigation bar, sidebar, configuration toggles, placeholder message, and template tags, is identical to the previous screenshot.

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

The screenshot shows the 'Viewing templates - sms' configuration page in the 'property' CRM. The page has a top navigation bar with 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below this is a secondary navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The main content area is titled 'Viewing templates - sms' and contains several toggle switches: 'Templates' (set to 'Lettings Viewing Feedback'), 'Lettings Default' (checked), 'Sales Default' (unchecked), and 'Auto-Send' (unchecked). The 'Hours Delay' field is set to '2' and is highlighted with an orange circle. Below these settings is a text area containing a template: '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 a list of tags including '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', and 'Land. Company Name'.

30 Click here to save the template.

The screenshot shows the same 'Viewing templates - sms' configuration page as in the previous image. The 'Hours Delay' field is still set to '2'. The 'Save Template' button, located to the right of the 'Hours Delay' field, is highlighted with an orange circle. The button has a small icon of a document with a checkmark and the text 'Save Template' below it. The rest of the page content remains the same.