

Viewing and Managing Viewer Feedback for a Property Viewing

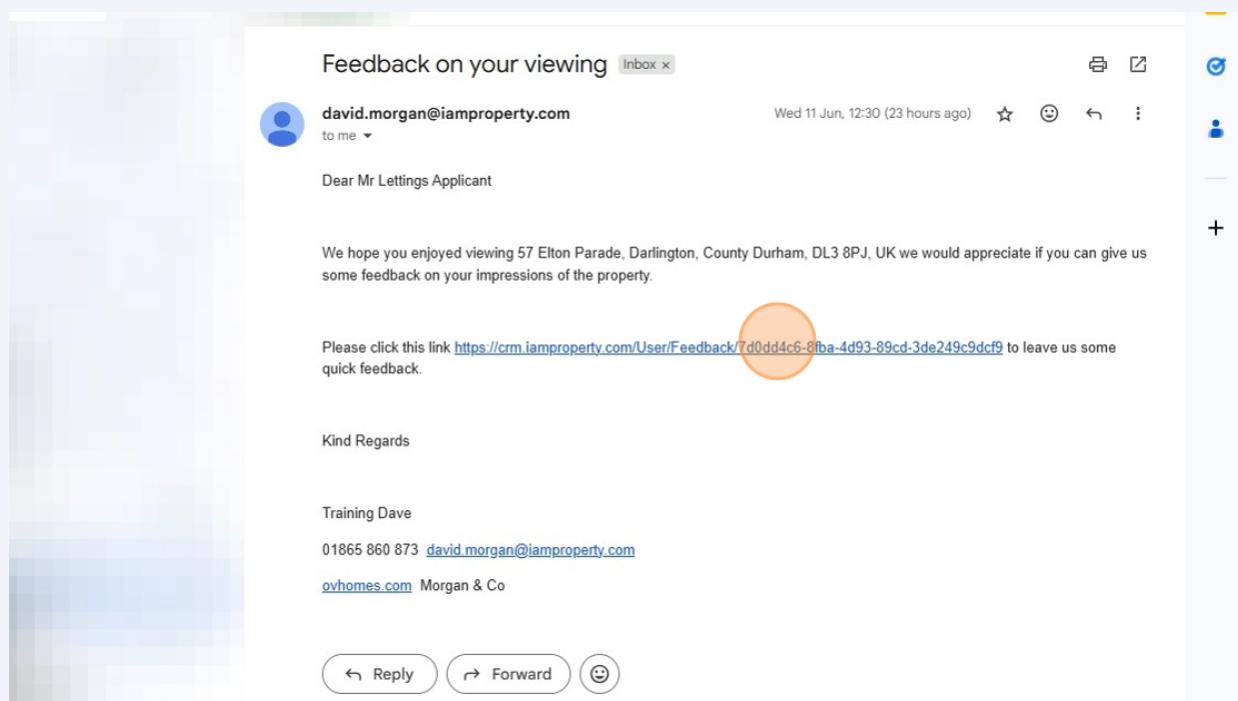


- 1 If you have enabled the Viewing Templates and set the Auto Send option your viewer will get the request for the feedback via email or SMS (as set by you).

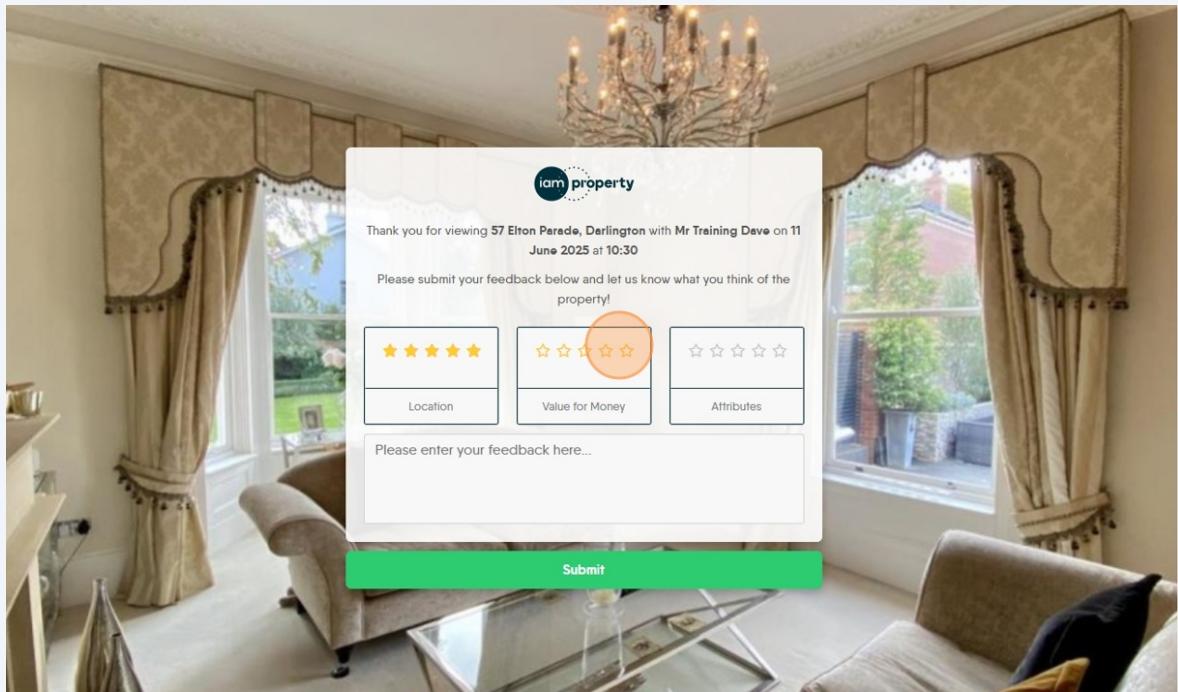
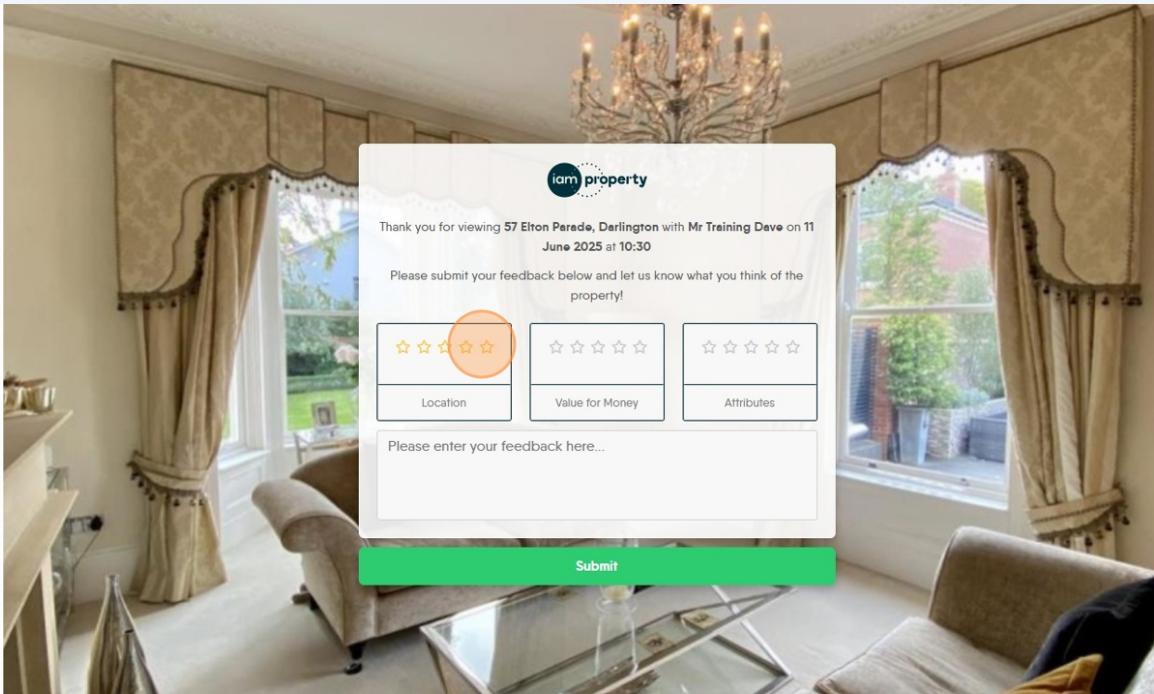
The request can be manually pushed from the feedback section of the viewing record. In this guide we will look at feedback request sent via the Auto Send option.

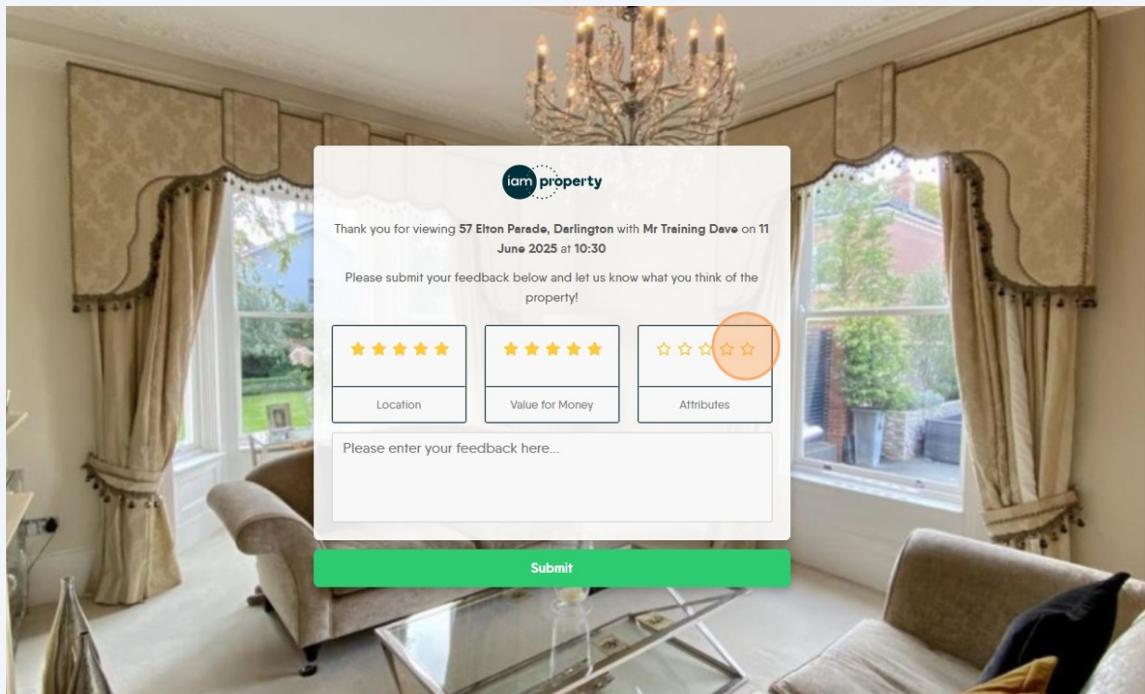
The content of this email and the time delay after the viewing is set by You, creating this is covered in another guide.

- 2 Click the link in the email

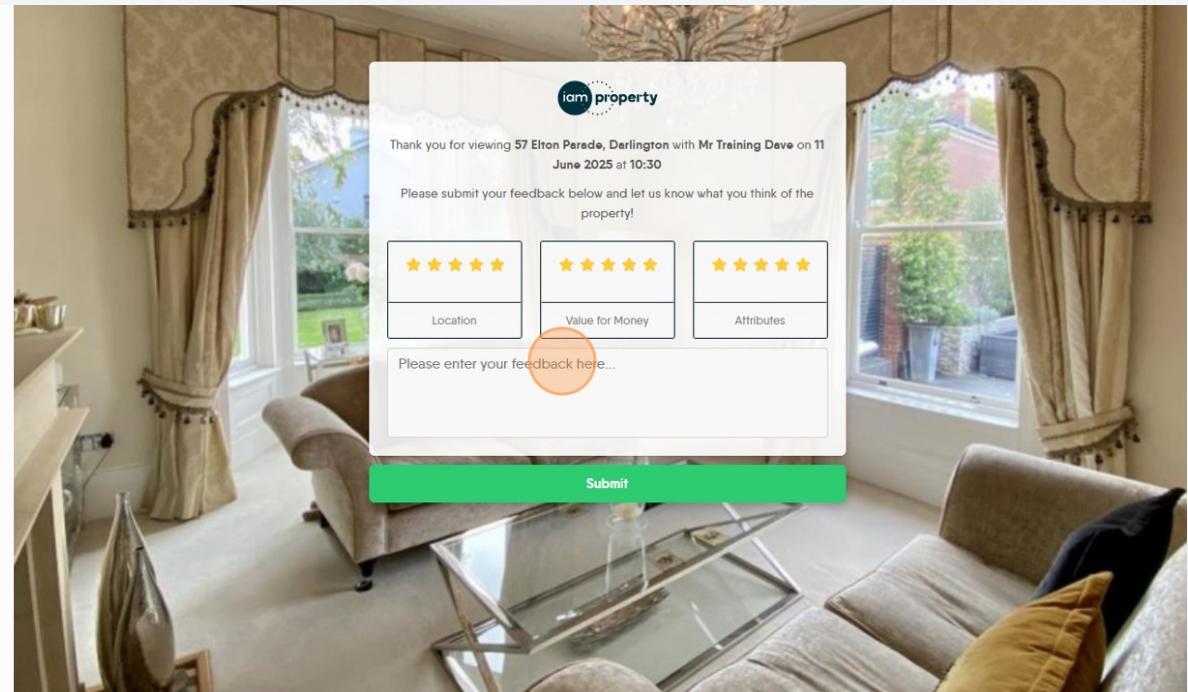


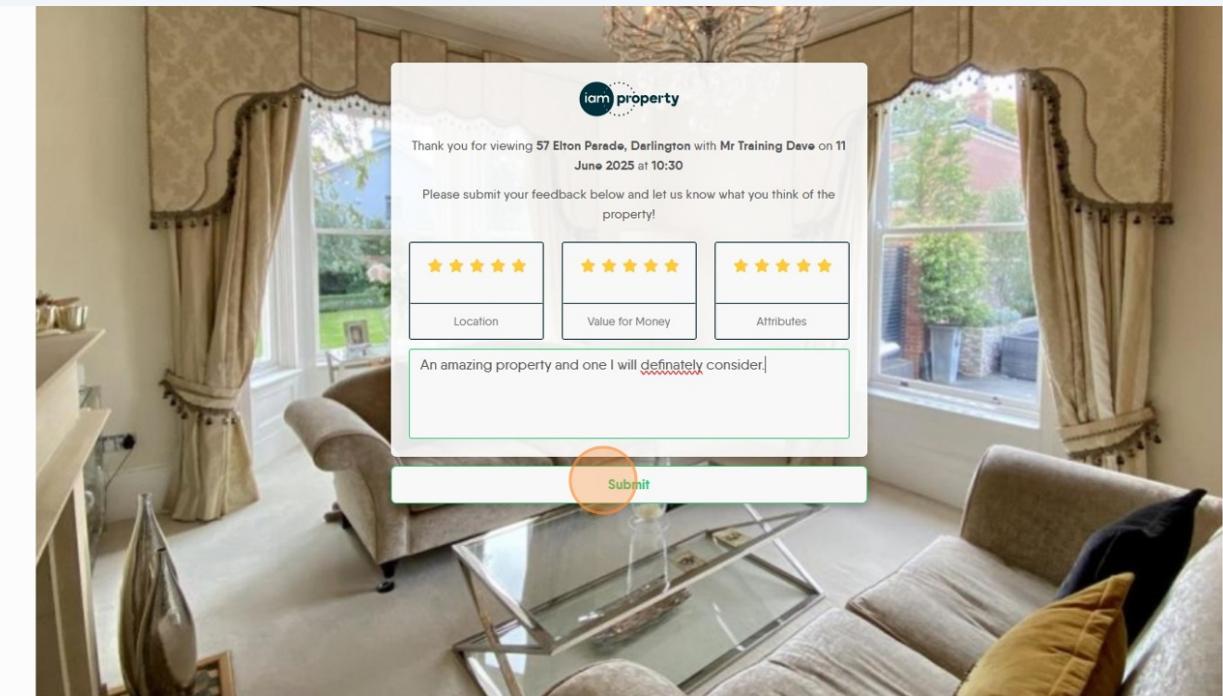
- 3 The Viewer will be taken to this screen where they can leave their feedback. Click here.





4 Click the "Please enter your feedback here..." field and enter any text feedback.
Click "Submit"



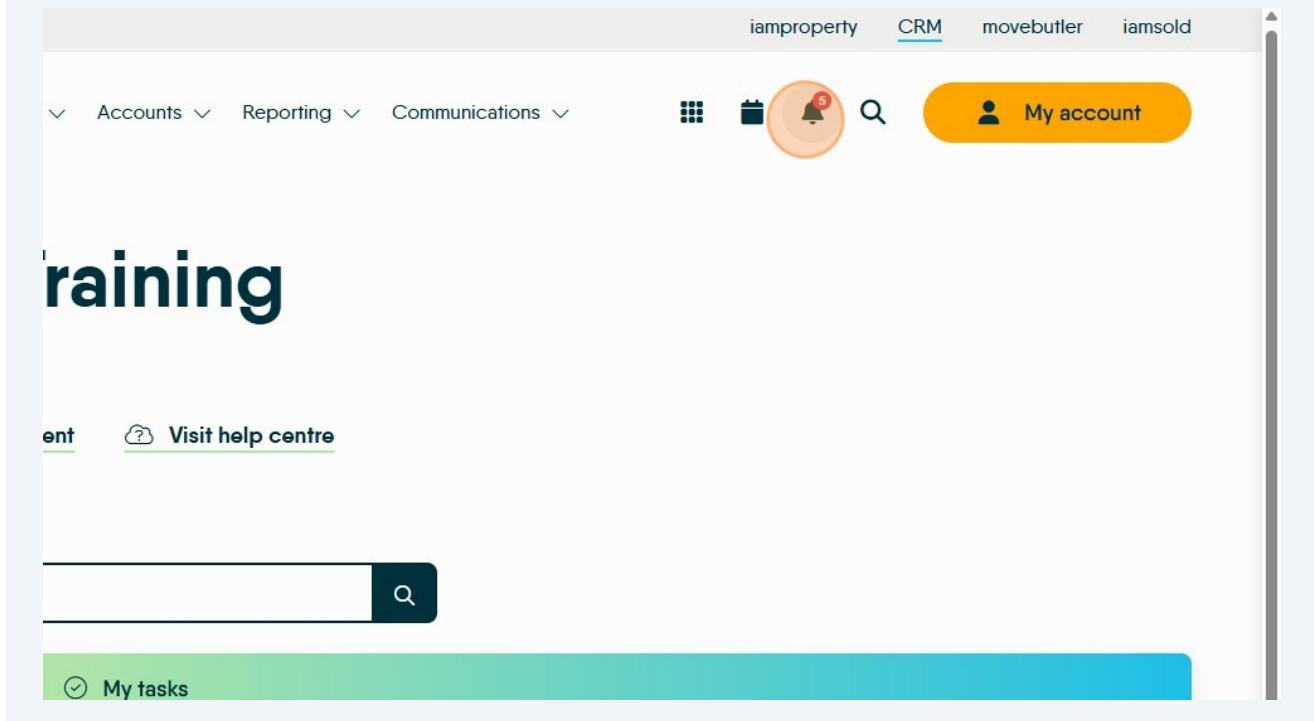


Agent Actions

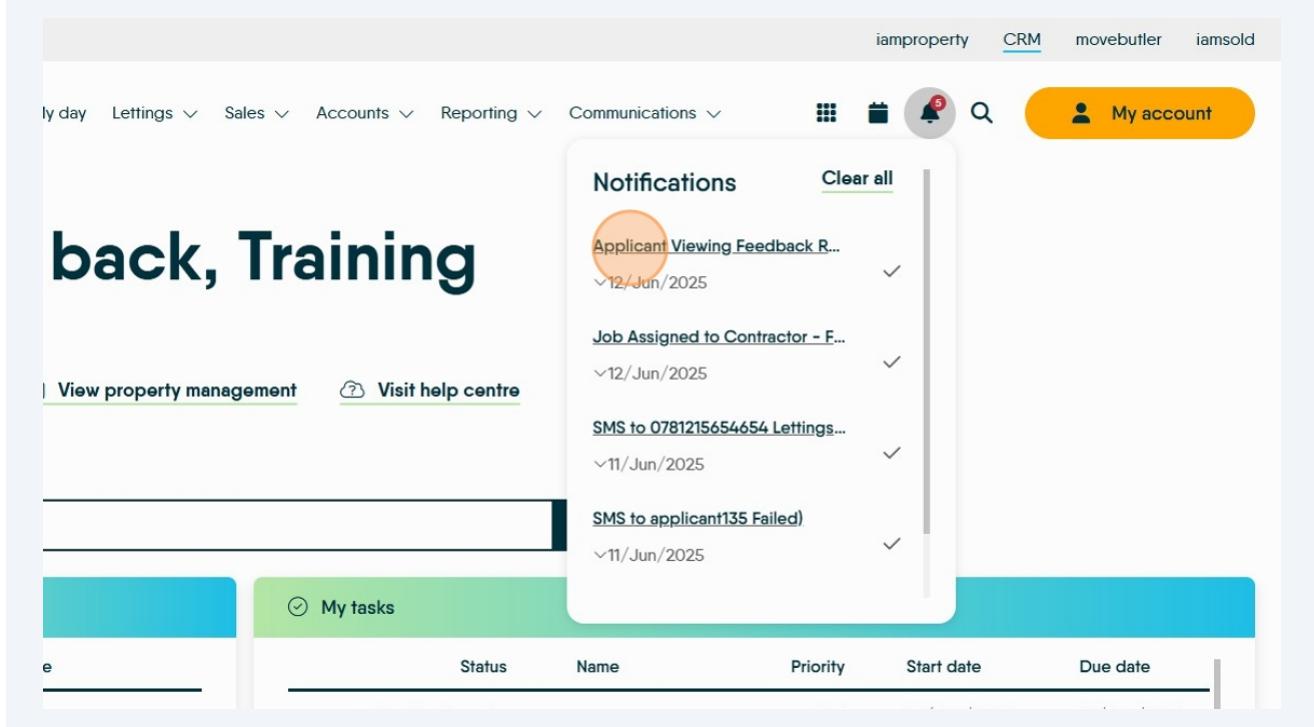
5 How do you as the agent see that feedback has been sent and manage that feedback? There are a number of ways that the feedback can be viewed. These are shown below.

In all cases where the viewer is sent a feedback request message either automated or pushed out to them manually the feedback they leave will be 'Private' this creates feedback that only you, the agent can see. If you want feedback to be available to Landlords/Vendors in their portals, copy the feedback to the 'Public' side of the feedback form.

6 There will be a notification in the 'Bell' icon at the top of the screen. Click "Notifications"

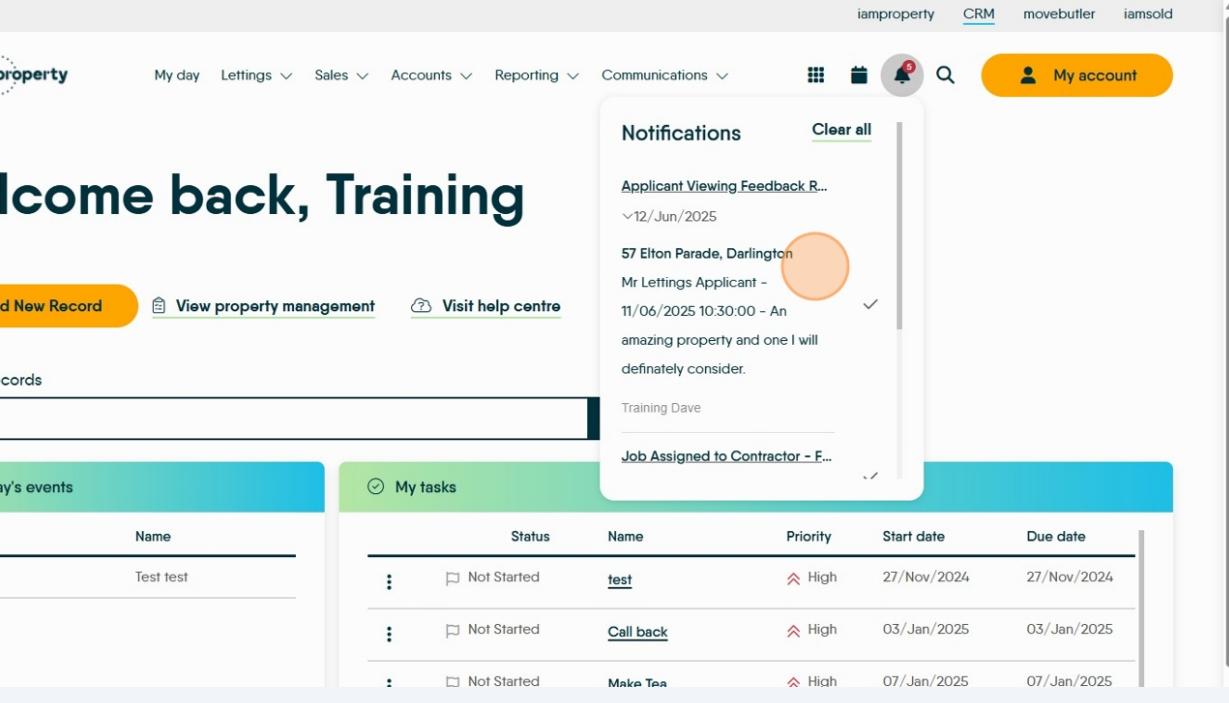


7 Click "Applicant Viewing Feedback Received"



8

You will then see the viewing feedback received. For example "57 Elton Parade, Darlington Mr Lettings Applicant - 11/06/2025 10:30:00 - An amazing property and one I will definitely consider."



The screenshot shows the iamsold CRM interface. At the top, there are navigation tabs: My day, Lettings, Sales, Accounts, Reporting, Communications, and a search bar. On the right, there are links for iamproperty, CRM, movebutler, and iamsold, along with a My account button. A notification bell icon with a red '3' is visible. A large orange circle highlights a specific notification in the Notifications panel. The notification details are as follows:

Notification Type	Details
Applicant Viewing Feedback R...	12/Jun/2025 57 Elton Parade, Darlington Mr Lettings Applicant - 11/06/2025 10:30:00 - An amazing property and one I will definitely consider.

Below the notifications, there are sections for 'My events' and 'My tasks'. The 'My tasks' section contains the following table:

Name	Status	Name	Priority	Start date	Due date
Test test	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

Managing Feedback in the Activity List

9

There are 2 areas in the Activity List that can help manage feedback. Viewings Requiring Feedback and Viewings Applicant Feedback Received

Viewings Requiring Feedback

10

This section can be used, for example, if the viewer has been called to request feedback or has left feedback in a different way.

11

Feedback can be managed from Viewings Requiring Feedback on the Activity list.
Click here.

The screenshot shows the 'Activity List' on the left and the 'Viewings Requiring Feedback' list on the right. The 'Viewings Requiring Feedback' list contains four entries:

	Negotiator	Applicant	Property
1	Training Dave	Lettings applicant130	162 Yew Tree Close, Hurworth, Darlington, DL2 2HX
2	Training Dave	Lettings Applicant	32 Yew Tree Close, Hurworth, Darlington, DL2 2HX
3	Training Dave	Sales applicant28	32 Yew Tree Close, Hurworth, Darlington, DL2 2HX
4	Training Dave	Applicant161	7135 Pelaw Crescent, Chester le Street, DH2 2HX

The fourth entry is highlighted with an orange circle. The 'Viewings Requiring Feedback' item in the Activity List is also highlighted with an orange circle.

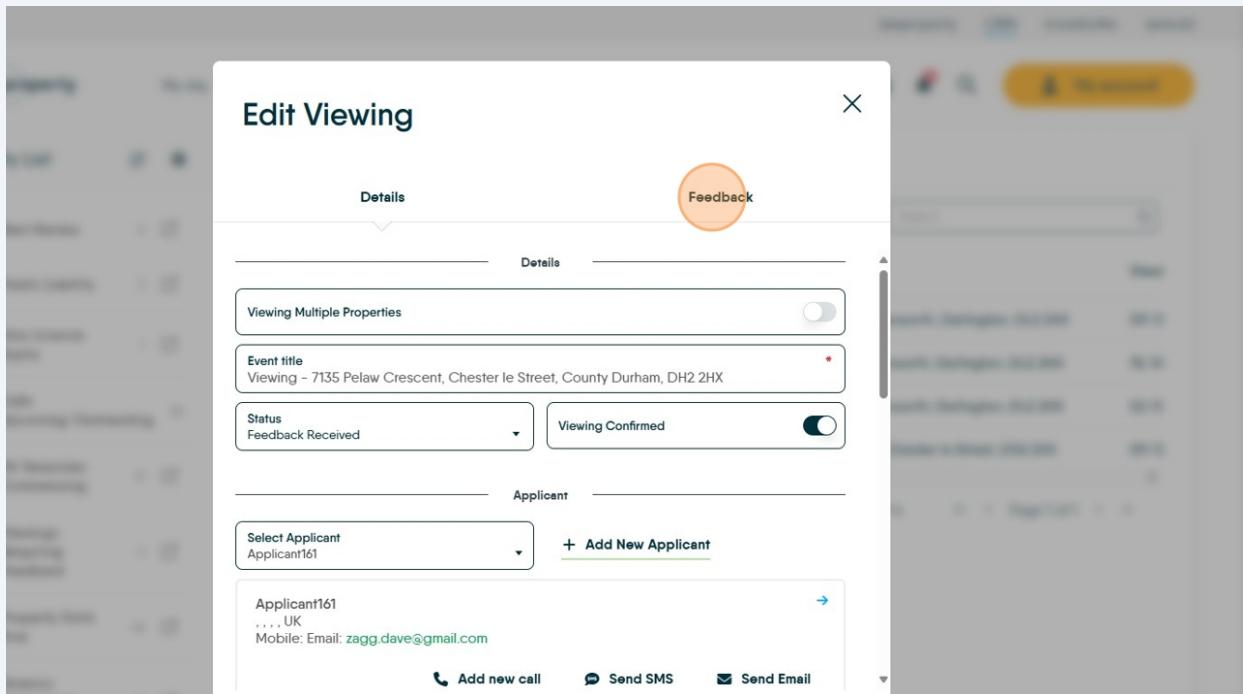
12

Click "Open Viewing"

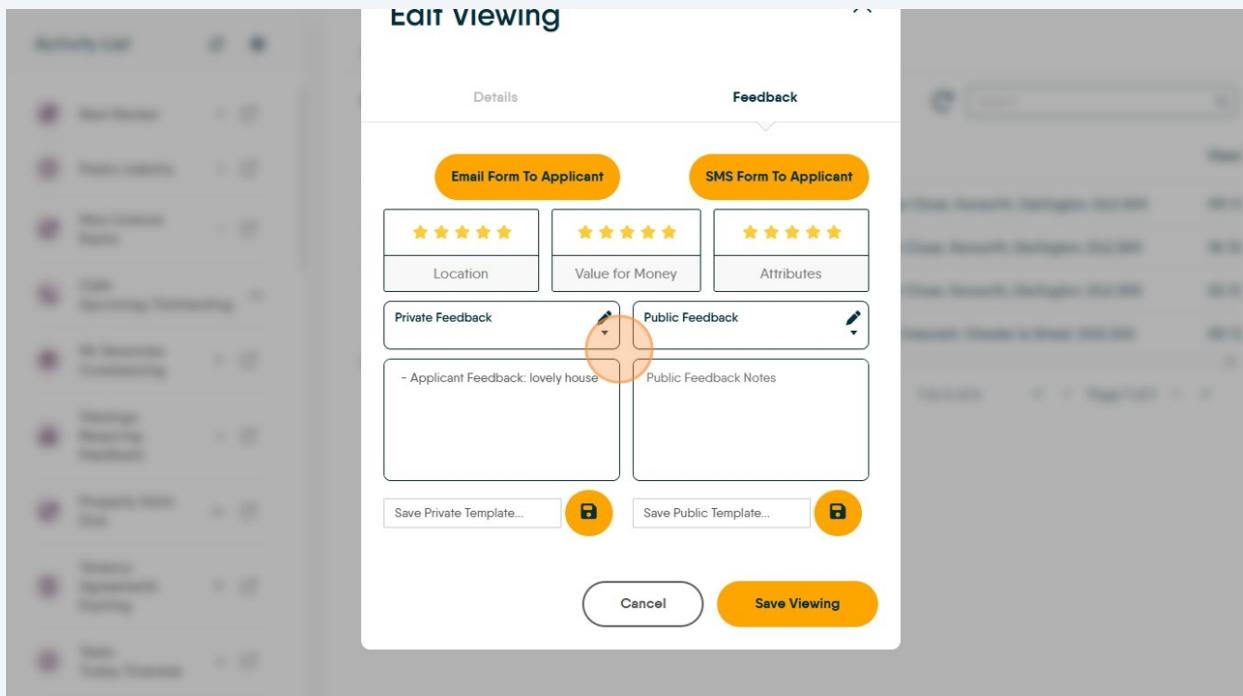
The screenshot shows the 'Activity List' on the left and the 'Viewings Requiring Feedback' list on the right. A context menu is open over the fourth entry in the 'Viewings Requiring Feedback' list, with 'Open Viewing' highlighted with an orange circle.

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

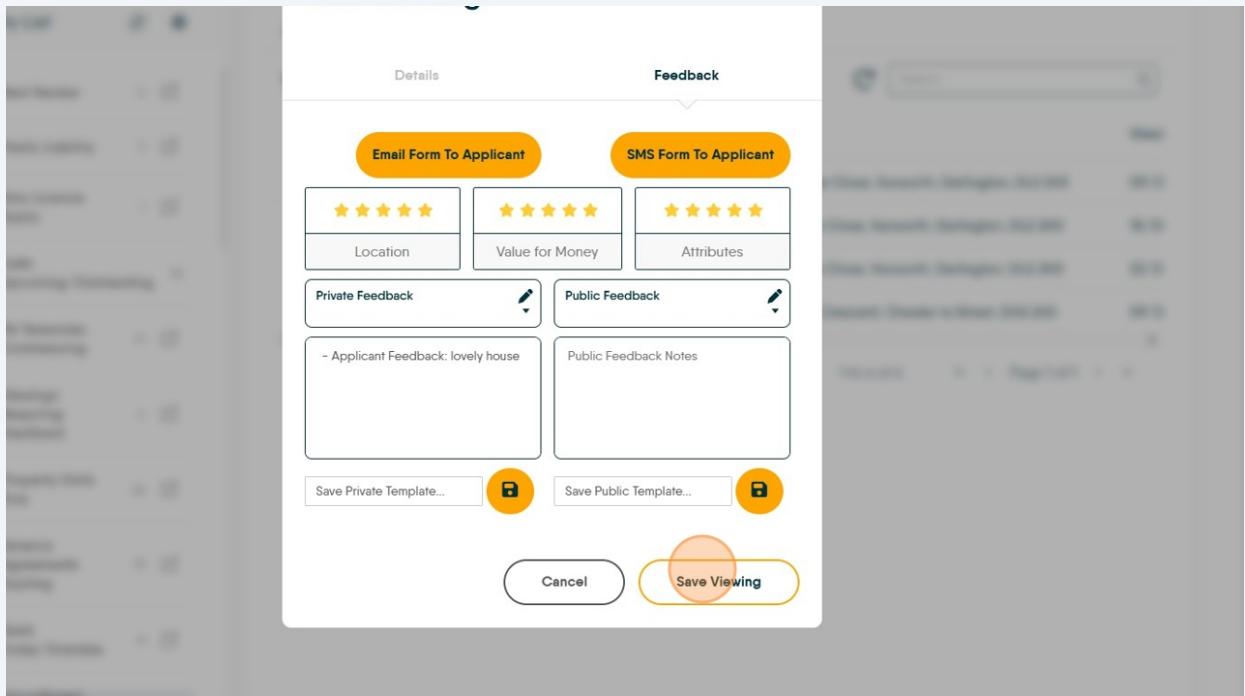
13 Click "Feedback"



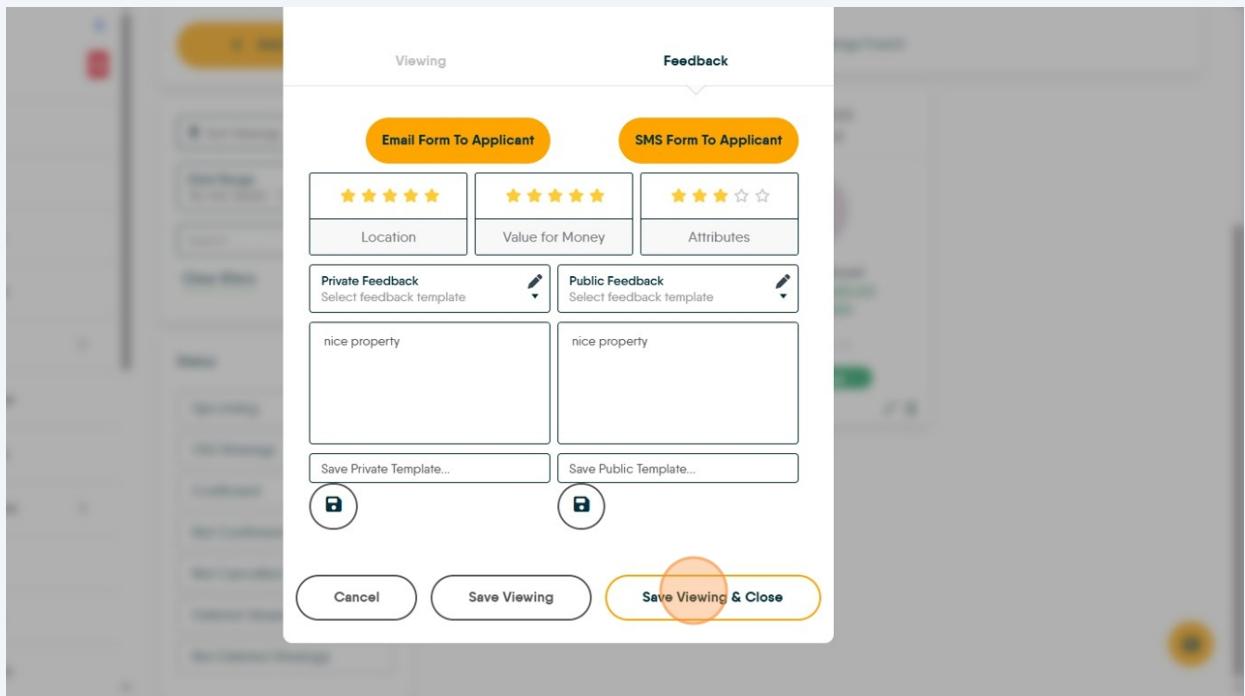
14 Click "Public Feedback" to add feedback the Landlord or Vendor can see or click Private feedback to not display the feedback.



15 Click "Save Viewing" to save the viewing and stay on the screen.



16 Click "Save Viewing & Close" to close the feedback screen.



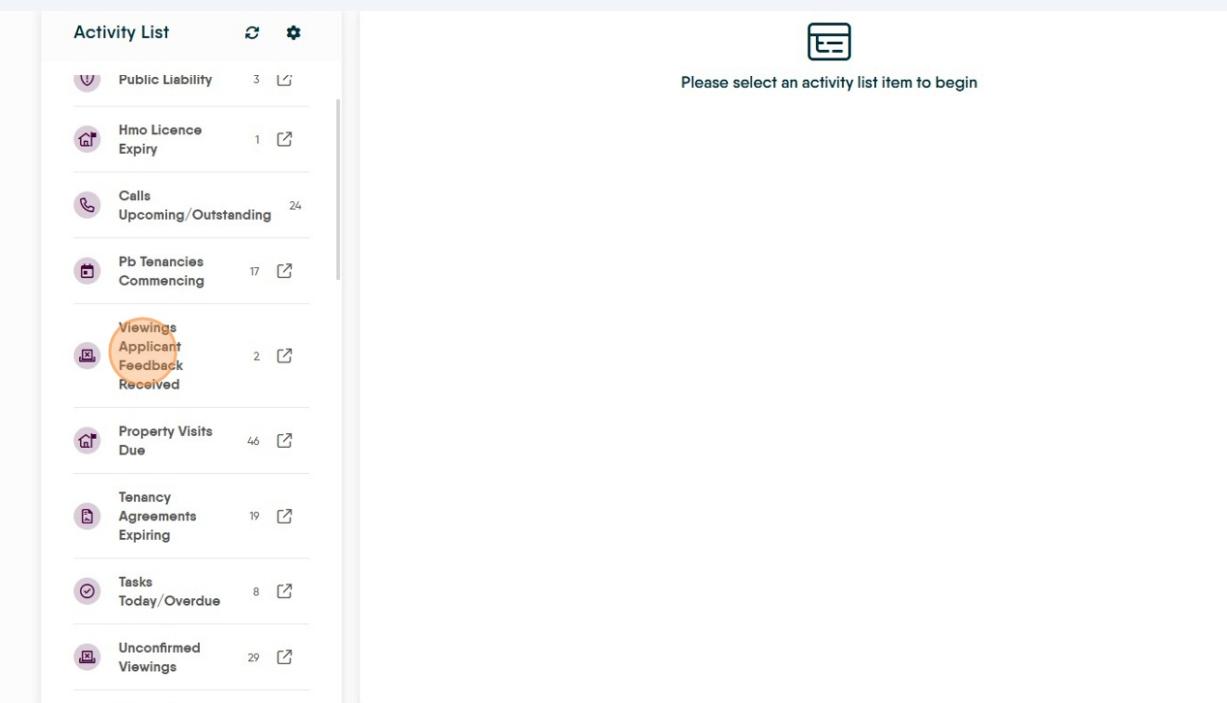
Viewings Applicant Feedback

17

This section would be used when the Viewer has responded to the automatically sent (or manually sent) viewing email or SMS.

18

Click "Viewings Applicant Feedback Received"

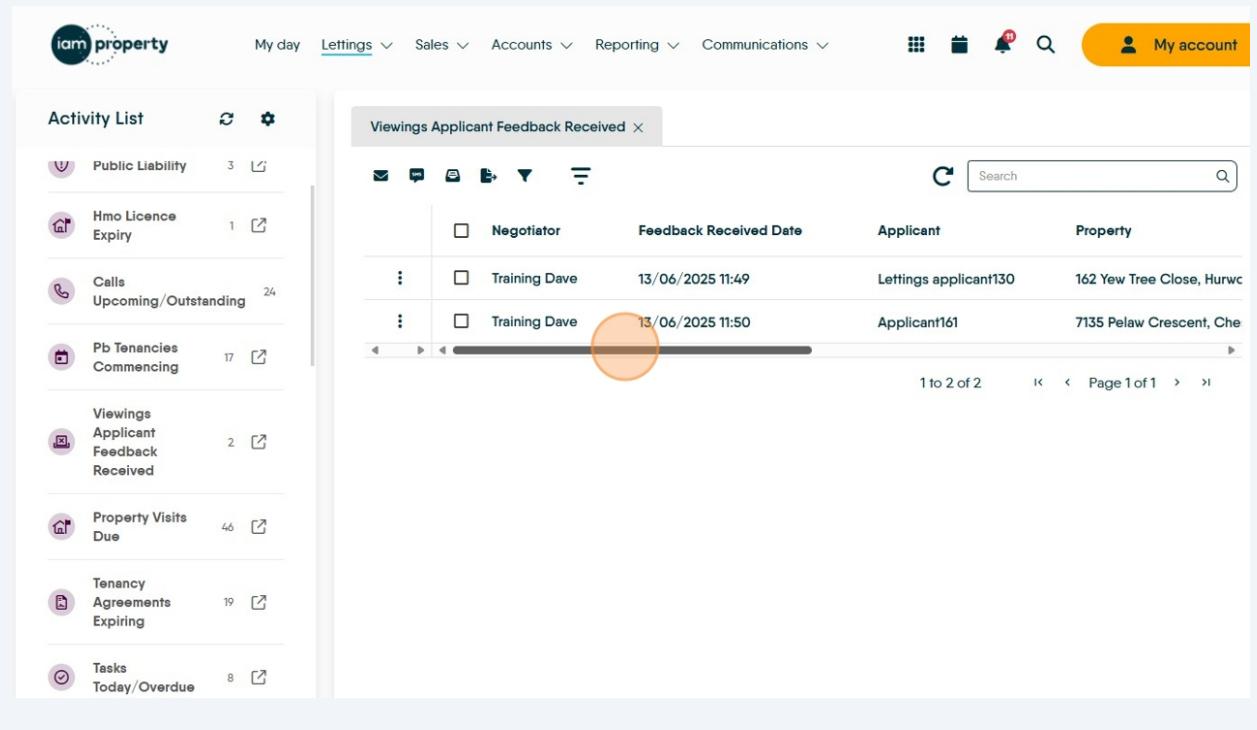


The screenshot shows a software interface titled "Activity List". On the left, there is a vertical list of tasks with icons and counts. On the right, there is a message area with a calendar icon and the text "Please select an activity list item to begin".

Icon	Task Description	Count
Public Liability	3	
Hmo Licence Expiry	1	
Calls Upcoming/Outstanding	24	
Pb Tenancies Commencing	17	
Viewings Applicant Feedback Received	2	
Property Visits Due	46	
Tenancy Agreements Expiring	19	
Tasks Today/Overdue	8	
Unconfirmed Viewings	29	

Please select an activity list item to begin

19 Click here.

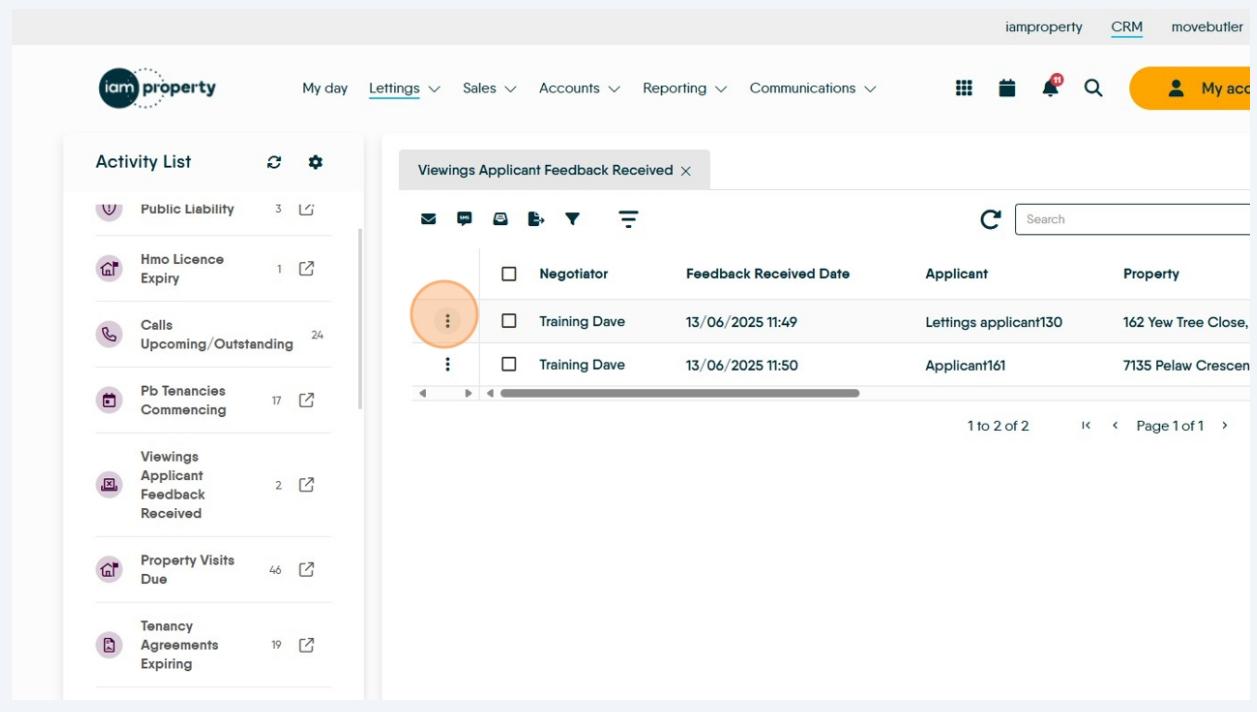


The screenshot shows the iamproperty software interface. On the left, there is an 'Activity List' with various items: Public Liability (3), Hmo Licence Expiry (1), Calls Upcoming/Outstanding (24), Pb Tenancies Commencing (17), Viewings Applicant Feedback Received (2), Property Visits Due (46), Tenancy Agreements Expiring (19), and Tasks Today/Overdue (8). On the right, there is a table titled 'Viewings Applicant Feedback Received' with the following data:

	Negotiator	Feedback Received Date	Applicant	Property
...	Training Dave	13/06/2025 11:49	Lettings applicant130	162 Yew Tree Close, Hurw...
...	Training Dave	13/06/2025 11:50	Applicant161	7135 Pelaw Crescent, Che...

The second row of the table is highlighted with an orange circle.

20 Click here.



The screenshot shows the iamproperty software interface. On the left, there is an 'Activity List' with various items: Public Liability (3), Hmo Licence Expiry (1), Calls Upcoming/Outstanding (24), Pb Tenancies Commencing (17), Viewings Applicant Feedback Received (2), Property Visits Due (46), and Tenancy Agreements Expiring (19). The first row of the list is highlighted with an orange circle. On the right, there is a table titled 'Viewings Applicant Feedback Received' with the following data:

	Negotiator	Feedback Received Date	Applicant	Property
...	Training Dave	13/06/2025 11:49	Lettings applicant130	162 Yew Tree Close, Hurw...
...	Training Dave	13/06/2025 11:50	Applicant161	7135 Pelaw Crescent, Che...

The first row of the table is highlighted with an orange circle.

21 Click "Open Viewing"

The screenshot shows the software's activity list on the left and a detailed view of a viewing record on the right.

Activity List:

- Public Liability (3)
- HMO Licence Expiry (1)
- Calls Upcoming/Ongoing (24)
- PB Tenancies Commencing (17)
- Viewings Applicant Feedback Received (2)
- Property Visits Due (46)
- Tenancy Agreements Expiring (19)
- Tasks Today/Overdue (8)
- Unconfirmed Viewings (29)

Viewings Applicant Feedback Received:

Negotiator	Feedback Received Date	Applicant	Property
Training Dave	13/06/2025 11:49	Lettings applicant130	162 Yew Tree Close,
Dave	13/06/2025 11:50	Applicant161	7135 Pelaw Crescent

Actions:

- Add Call (Applicant)
- Log Call (Applicant)
- Add Call (Landlord)
- Log Call (Landlord)
- Open Viewing** (highlighted with an orange circle)
- Send Email to Landlord
- Send SMS to Landlord
- Add Journal (Applicant)
- Add Journal (Property)
- View Property
- View Applicant

22 Click "Feedback"

The screenshot shows the 'Edit Viewing' dialog box.

Details:

- Viewing Multiple Properties:
- Event title: Viewing - 162 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX
- Status: Feedback Received
- Viewing Confirmed:

Feedback: (highlighted with an orange circle)

Applicant:

- Select Applicant: Ms Lettings applicant130
- + Add New Applicant

Details for the selected applicant:

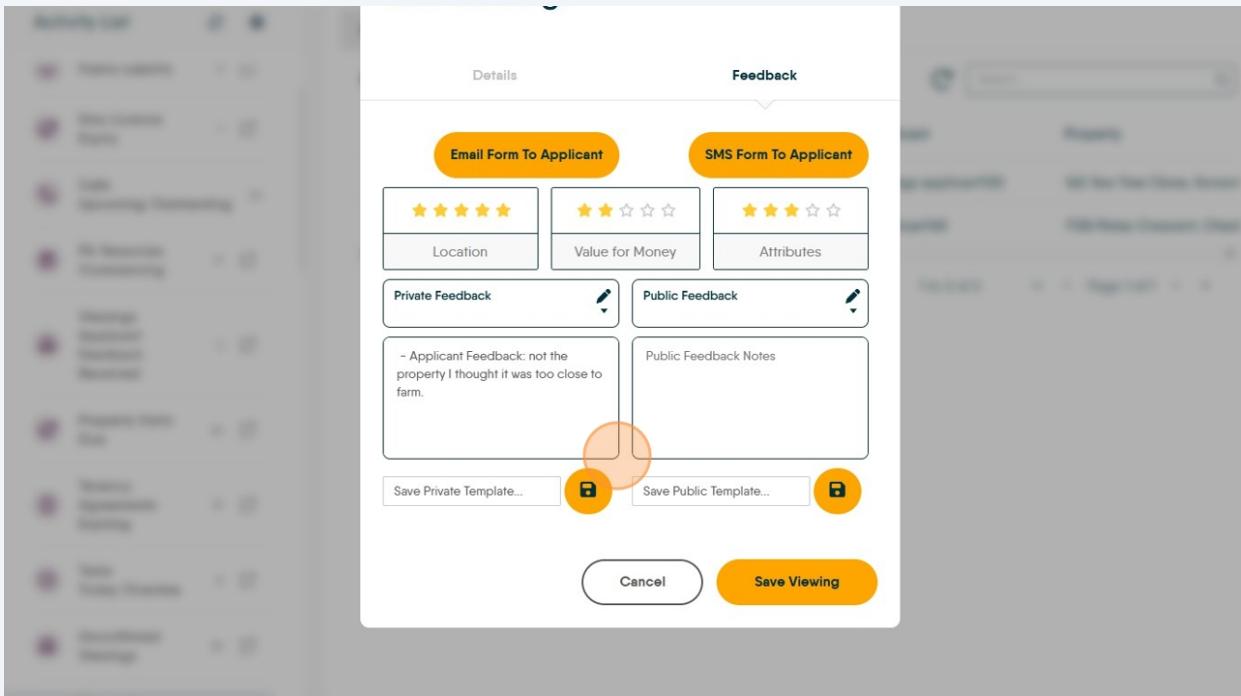
Ms Lettings applicant130
... , UK
Mobile: 3545113 Email: zagg.dave@gmail.com

Actions:

- Add new call
- Send SMS
- Send Email

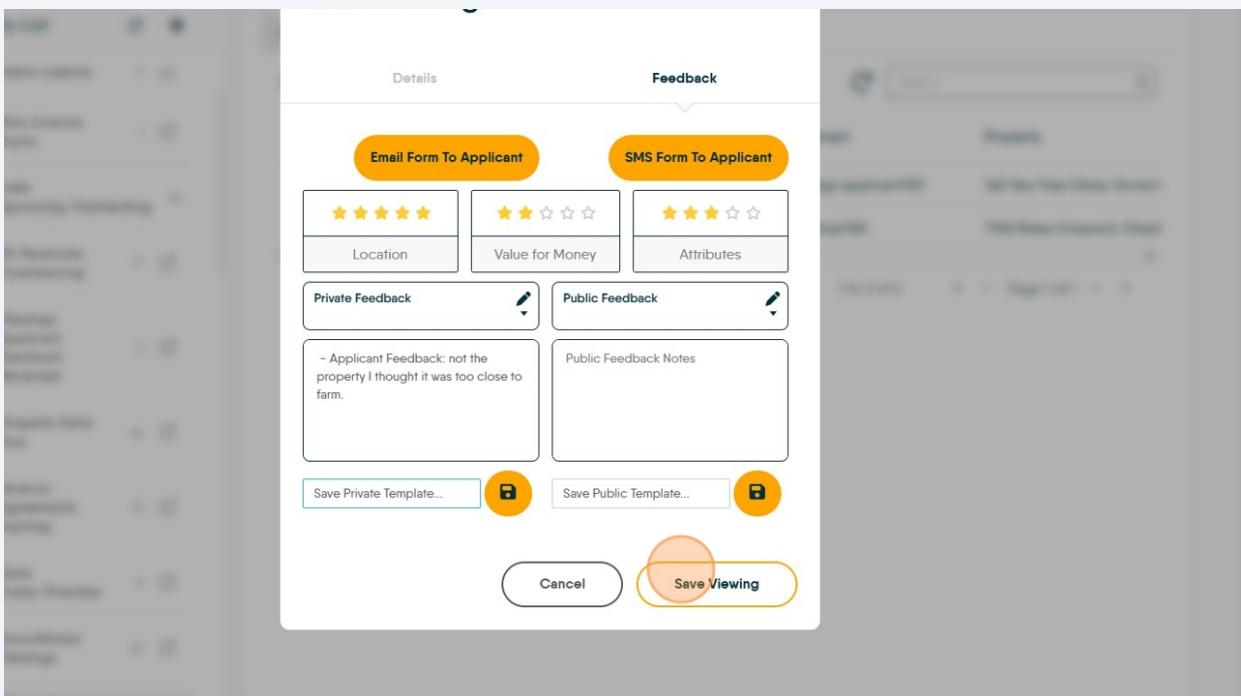
23

The feedback left will be in 'Private Feedback', allowing you to edit and move over to the public feedback area.



24

Click "Save Viewing"



Adding Feedback via the Property Record

25

From the property record
Click "Viewings"

26 Click here.

0 G

+ Add Viewing

Sort Viewings

Date Range 12/03/2025 - 12/07/2025

Search

Clear filters

Status

- Upcoming
- Old Viewings
- Confirmed
- Not Confirmed
- Not Cancelled
- Deleted Viewings
- Not Deleted Viewings

22 May 2025 13:15 - 13:45

SA

Sales applicant28
zagg.dave@gmail.com
0785369522

★★★★★ Confirmed

Training Da... edit

15 May 2025 10:45 - 11:15

LA

Lettings Applicant
zagg.dave@gmail.com
0781215654654

★★★★★ Confirmed

Training Da... edit

27 Click "Feedback"

Edit viewing

Viewing

Feedback

Event title: Viewing - 32 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX

Status: Booked

Viewing Confirmed:

Applicant: Mr Lettings Applicant

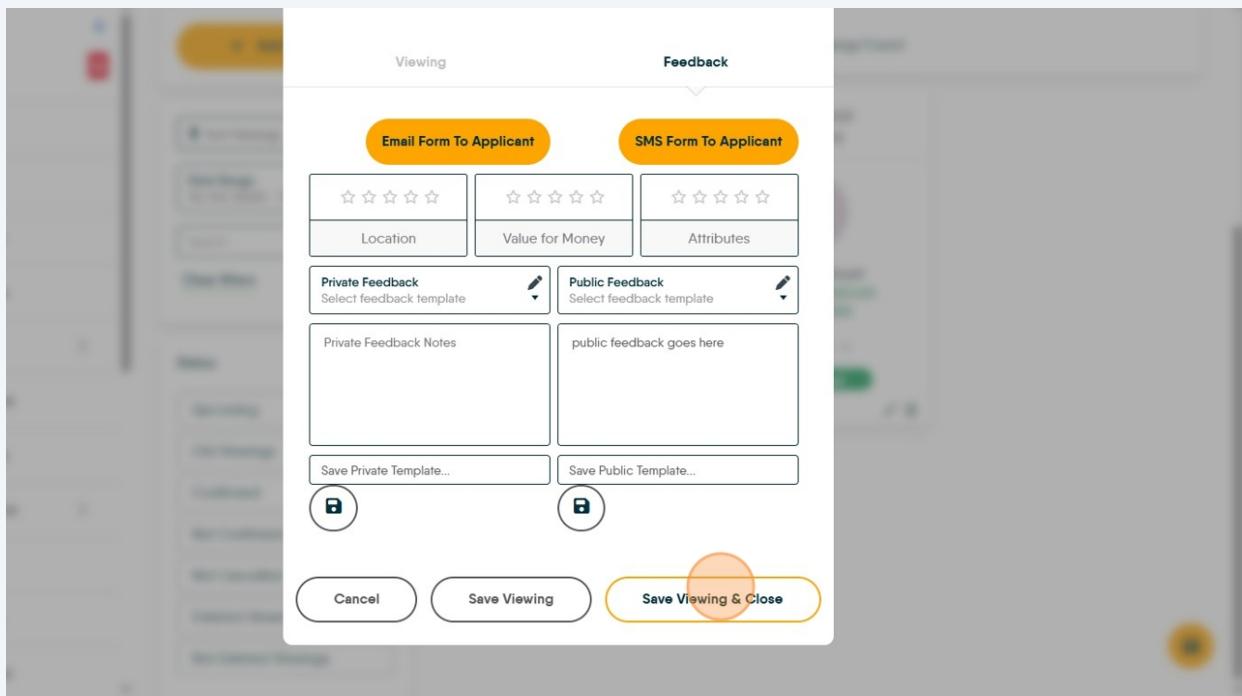
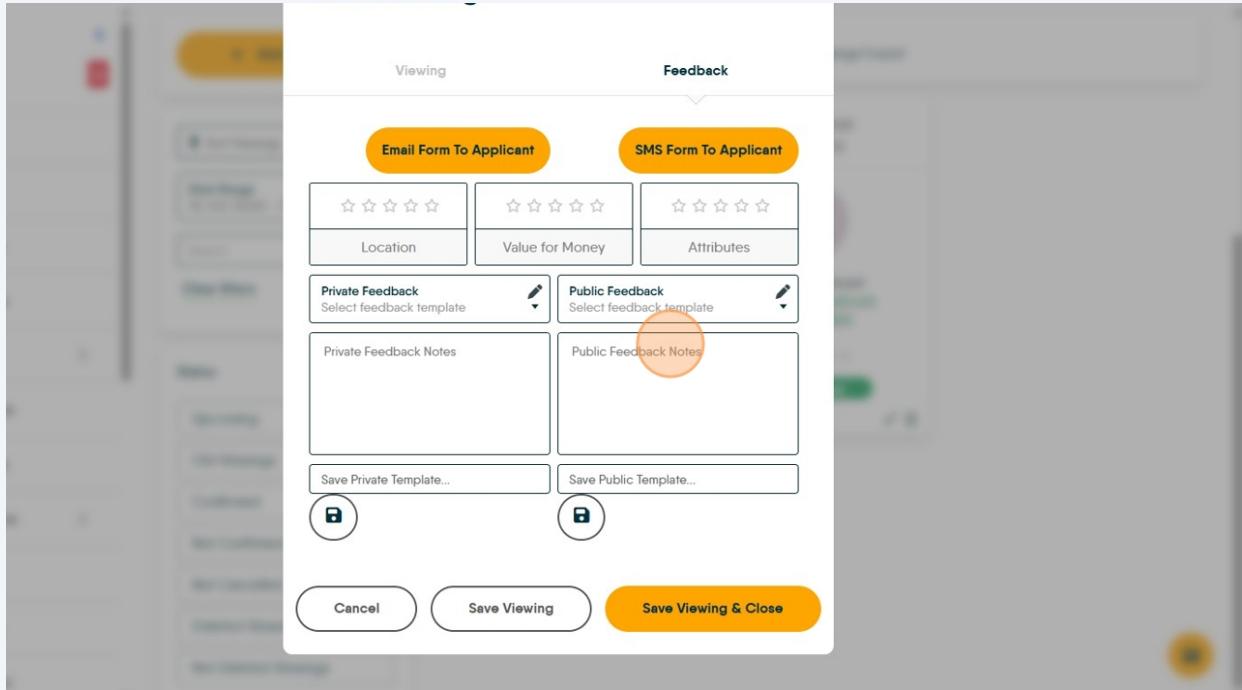
+ Add New Applicant

Mr Lettings Applicant
73 Abbey Road, Darlington, County Durham, DL3 8LT, UK.
Mobile: 0781215654654 Email: zagg.dave@gmail.com

View applicant Add new call Send SMS Send Email

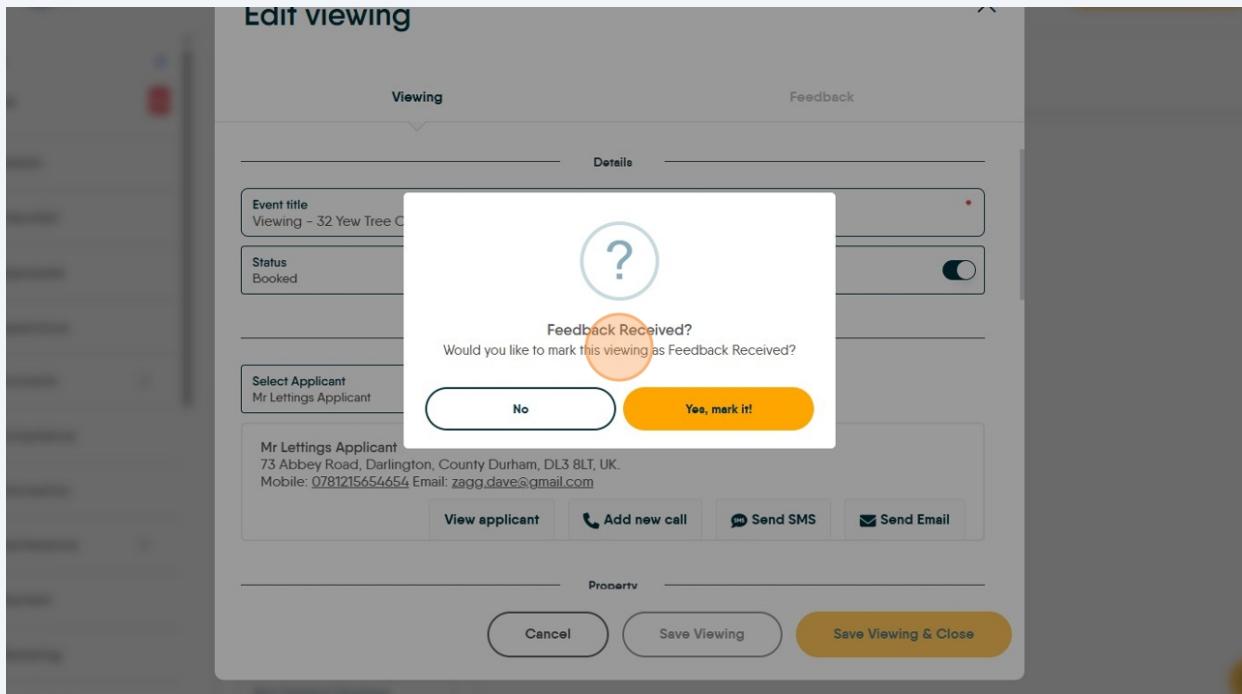
28

To keep your feedback private, use the 'Private Feedback' option, this will mean any feedback left does not show in the Portals. Click the "Public Feedback Notes" field to make feedback available in the portals. Once completed, click "Save Viewing & Close"



29

If you have completed adding the feedback then in the "Would you like to mark this viewing as Feedback Received?" field click yes mark it, otherwise click no and this will allow you to revisit the feedback and add more.



30

Feedback left will also show in the property journal.

