

Viewing and Managing Viewer Feedback for a Property Viewing



1

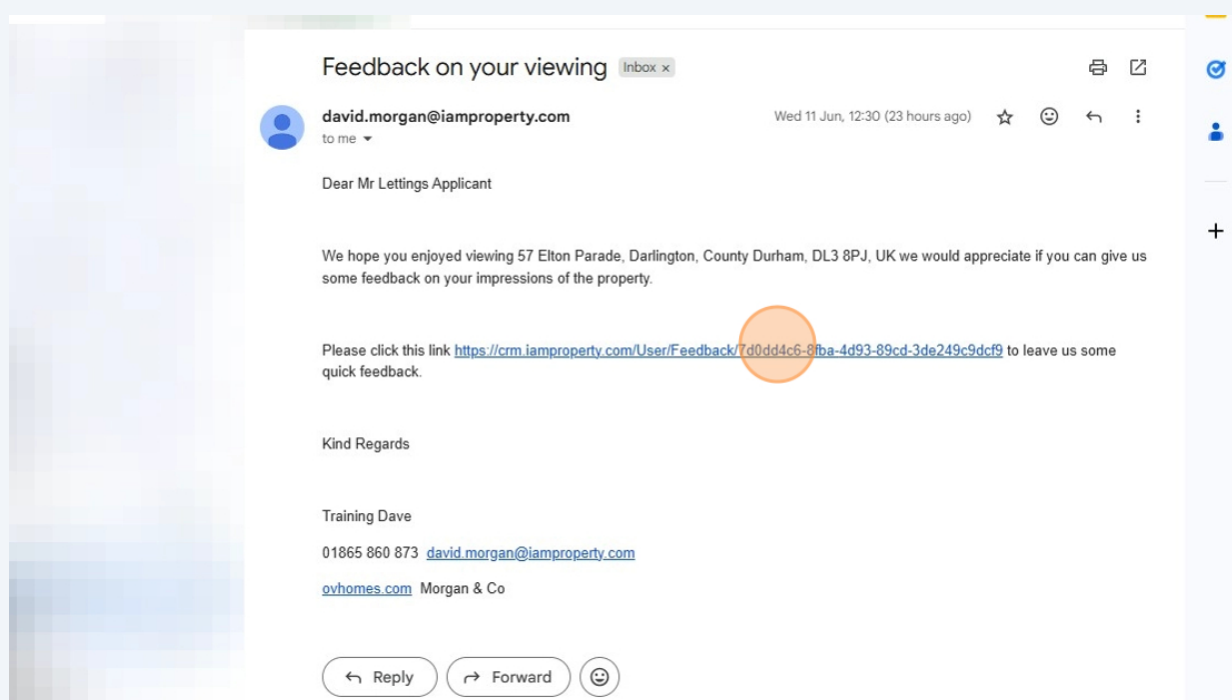
If you have enabled the Viewing Templates and set the Auto Send option your viewer will get the request for the feedback via email or SMS (as set by you).

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.

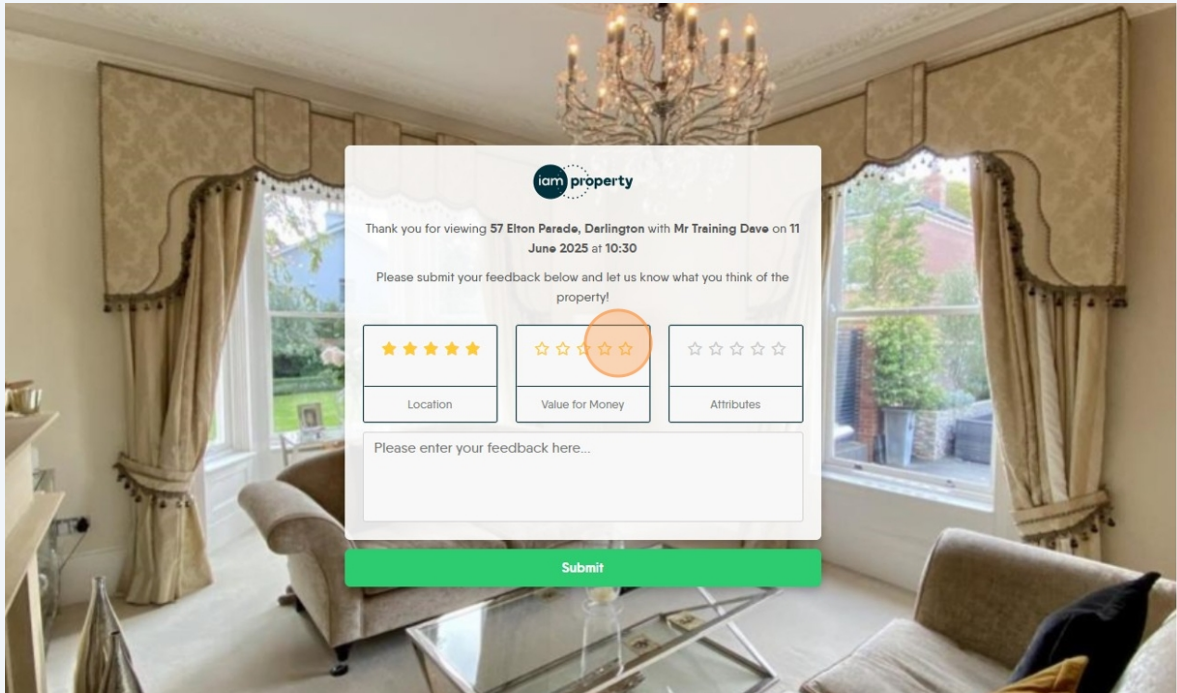
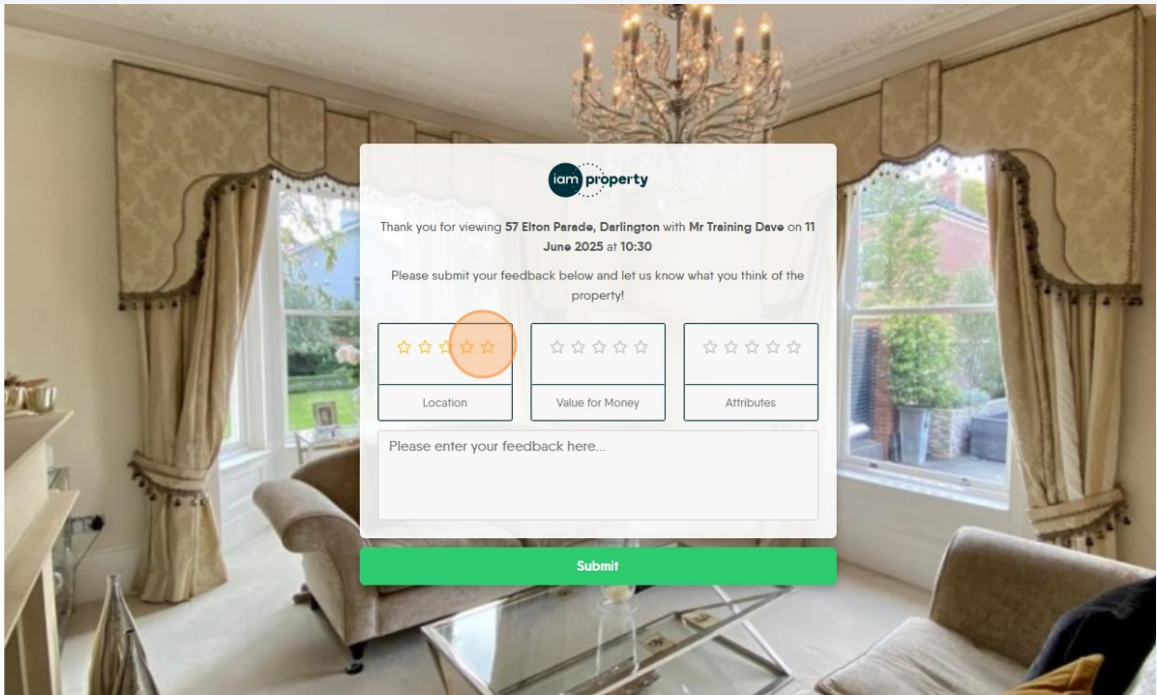
2

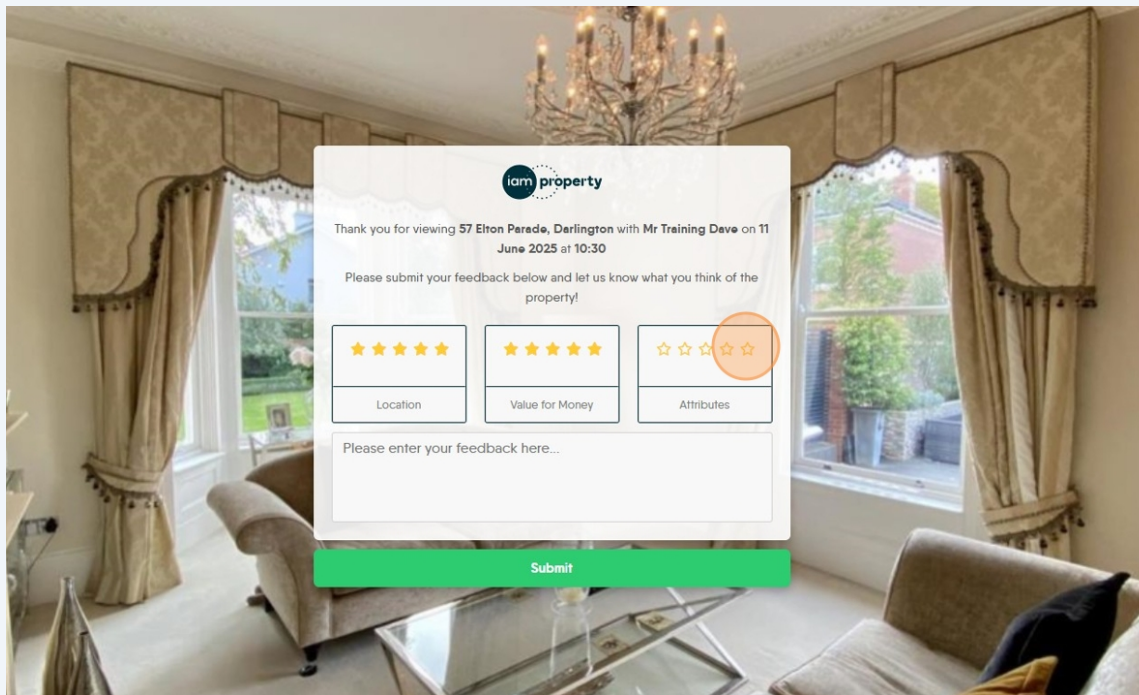
Click the link in the email



3

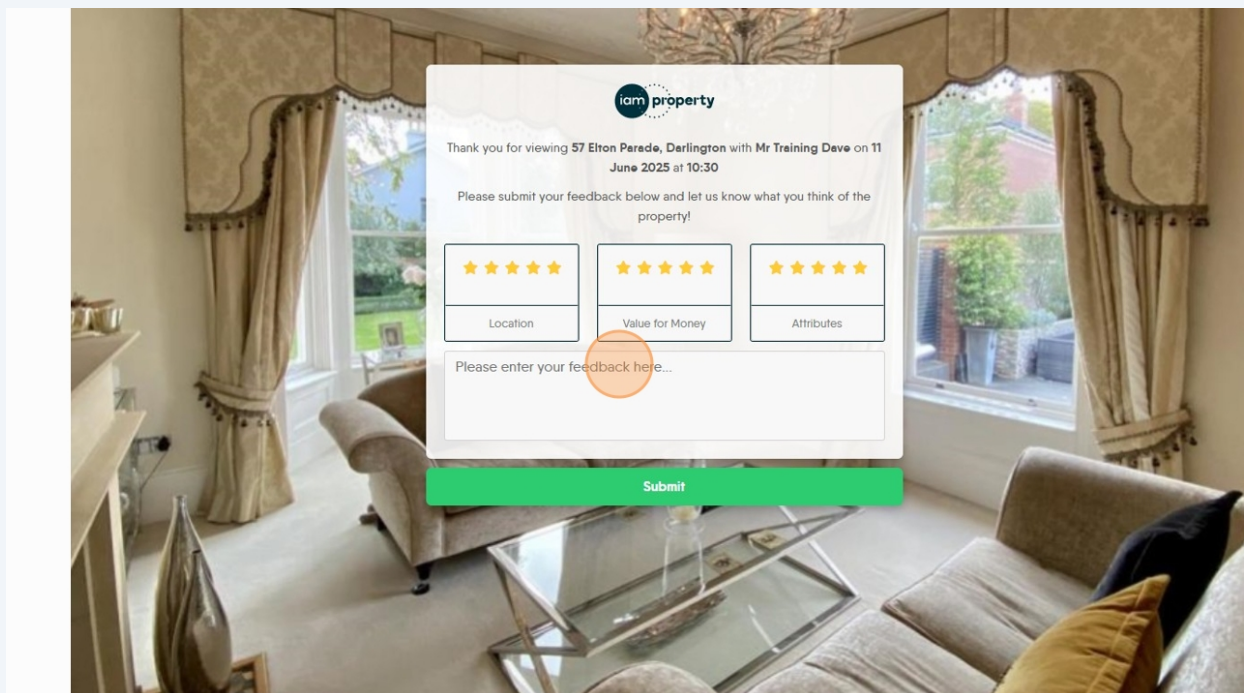
The Viewer will be taken to this screen where they can leave their feedback. Click here.

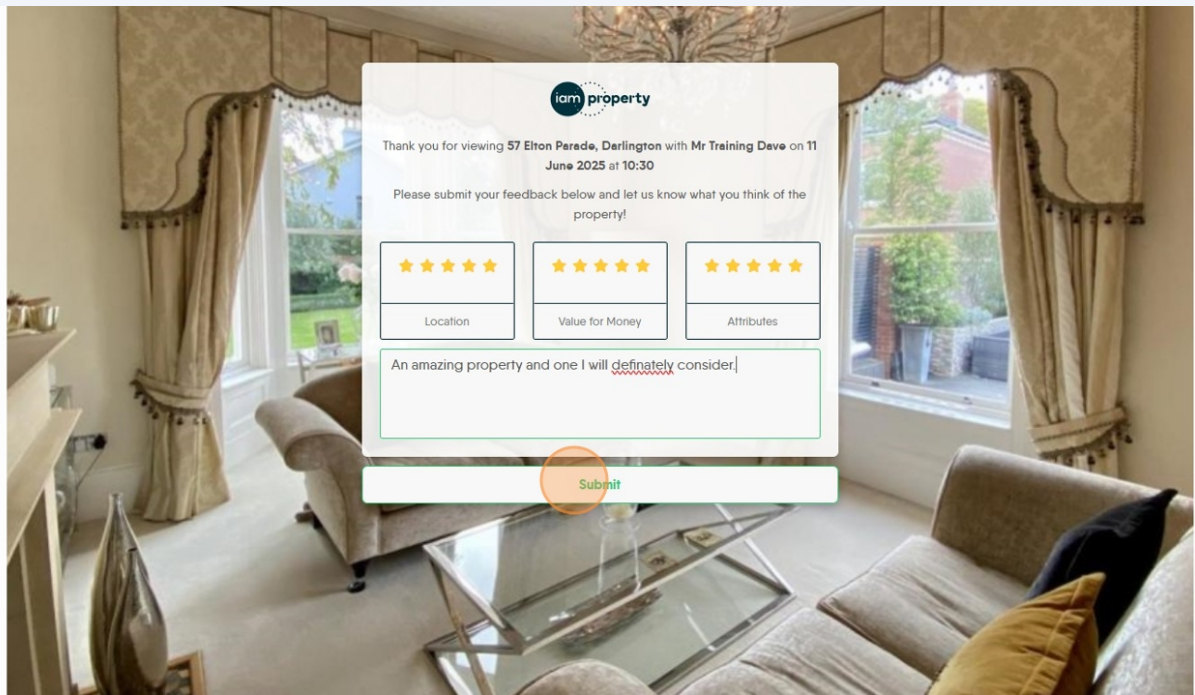




4

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





Agent Actions

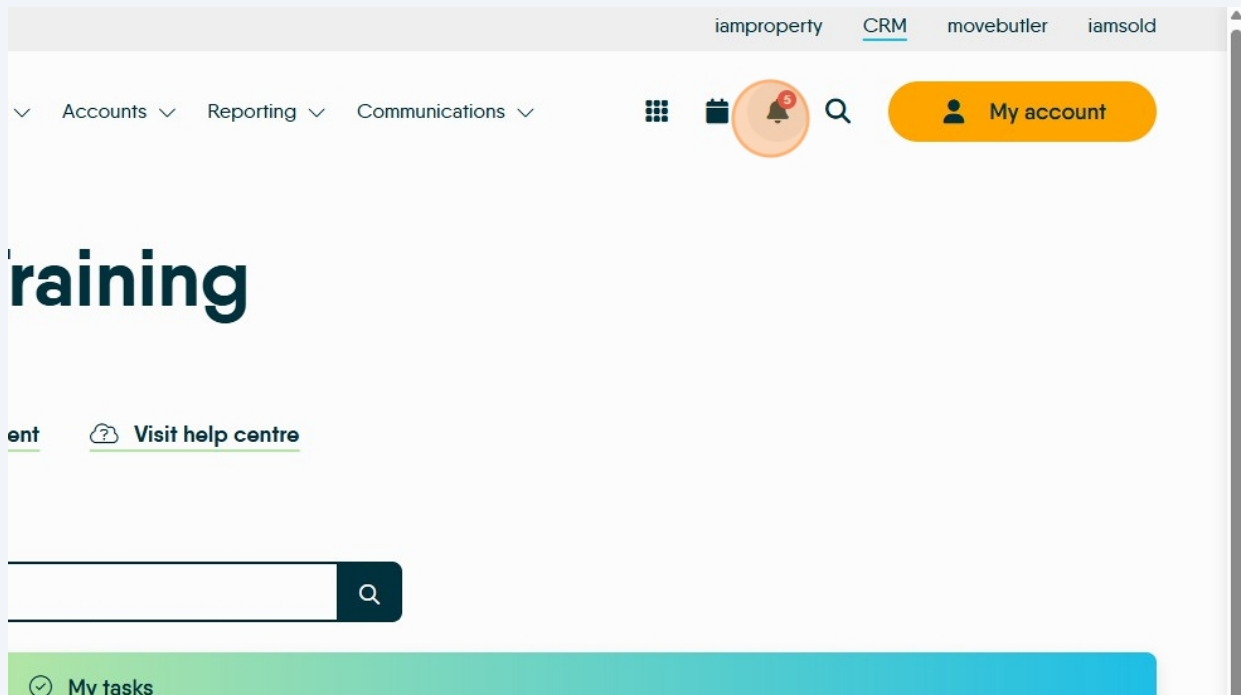
5

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.

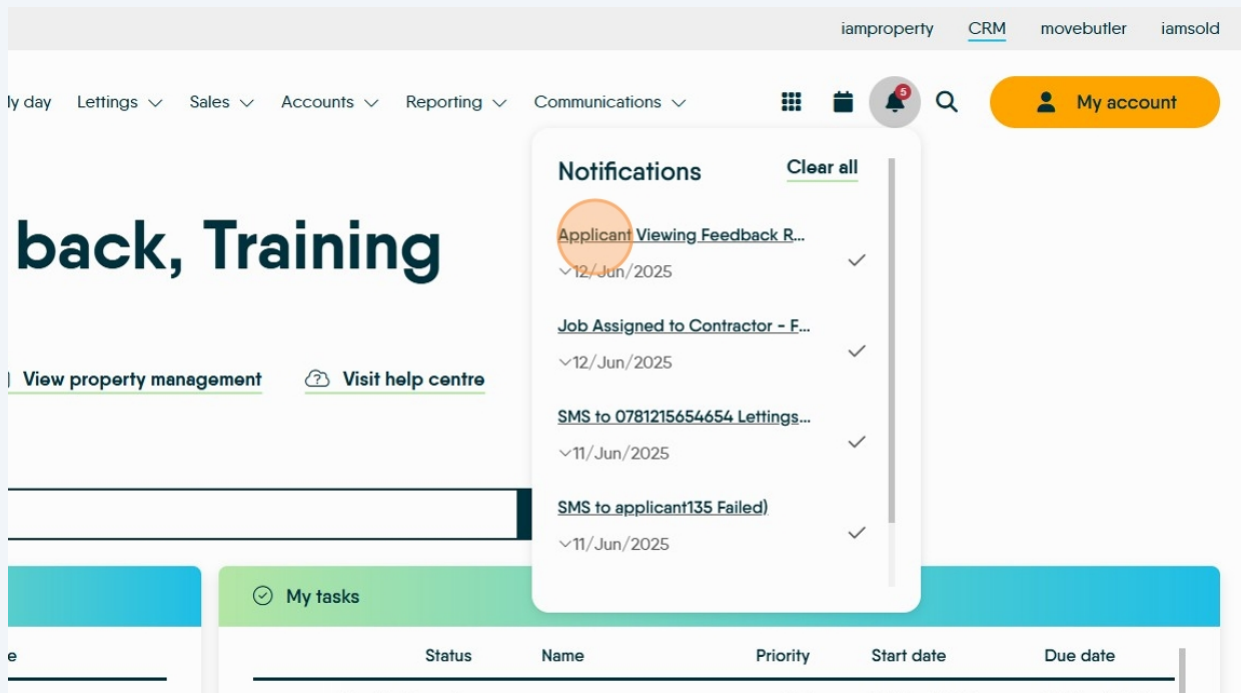
6

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 iamproperty CRM dashboard. At the top, there's a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A 'My account' button is on the right. The main header says 'Welcome back, Training'. Below this, there are links for 'Add New Record', 'View property management', and 'Visit help centre'. A notification pop-up is visible, titled 'Notifications' with a 'Clear all' link. The notification lists 'Applicant Viewing Feedback R...' dated '12/Jun/2025' for '57 Elton Parade, Darlington Mr Lettings Applicant - 11/06/2025 10:30:00 - An amazing property and one I will definitely consider.' Below the notification, there's a 'My tasks' section with a table of 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

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.

Activity List

- Rent Review 5
- Public Liability 3
- Hmo Licence Expiry 1
- Calls Upcoming/Outstanding 24
- Pb Tenancies Commencing 17
- Viewings Requiring Feedback 4
- Property Visits Due 46
- Tenancy Agreements Expiring 19
- Tasks Today/Overdue 8

Applicant - Offer Questions Sent × Viewings Requiring Feedback ×

Search

	<input type="checkbox"/> Negotiator	Applicant	Property
⋮	<input type="checkbox"/> Training Dave	Lettings applicant130	162 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	<input type="checkbox"/> Training Dave	Lettings Applicant	32 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	<input type="checkbox"/> Training Dave	Sales applicant28	32 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	<input type="checkbox"/> Training Dave	Applicant161	7135 Pelaw Crescent, Chester le Street, DH2 2HX

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12

Click "Open Viewing"

Activity List

- Rent Review 5
- Public Liability 3
- Hmo Licence Expiry 1
- Calls Upcoming/Outstanding 24
- Pb Tenancies Commencing 17
- Viewings Requiring Feedback 4
- Property Visits Due 46
- Tenancy Agreements Expiring 19
- Tasks Today/Overdue 8

Applicant - Offer Questions Sent × Viewings Requiring Feedback ×

Search

	<input type="checkbox"/> Negotiator	Applicant	Property
⋮	<input type="checkbox"/> Training Dave	Lettings applicant130	162 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	<input type="checkbox"/> Training Dave	Lettings Applicant	32 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	<input type="checkbox"/> Training Dave	Sales applicant28	32 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	<input type="checkbox"/> Training Dave	Applicant161	7135 Pelaw Crescent, Chester le Street, DH2 2HX

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- 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"

The screenshot shows the 'Edit Viewing' modal with the 'Details' tab selected. The 'Feedback' tab is highlighted with an orange circle. The modal contains the following fields:

- Viewing Multiple Properties:** A toggle switch.
- Event title:** Viewing - 7135 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX
- Status:** Feedback Received (dropdown menu)
- Viewing Confirmed:** A toggle switch.
- Applicant:** Select Applicant (dropdown menu) with 'Applicant161' selected. A '+ Add New Applicant' link is next to it.
- Applicant161 details:** . . . , UK, Mobile: Email: zagg.dave@gmail.com
- Actions:** Add new call, Send SMS, Send Email

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

The screenshot shows the 'Edit Viewing' modal with the 'Feedback' tab selected. The 'Public Feedback' section is highlighted with an orange circle. The modal contains the following fields:

- Email Form To Applicant:** A button.
- SMS Form To Applicant:** A button.
- Location:** A field with a star rating (5 stars).
- Value for Money:** A field with a star rating (5 stars).
- Attributes:** A field with a star rating (5 stars).
- Private Feedback:** A text area with a placeholder '- Applicant Feedback: lovely house'.
- Public Feedback:** A text area with a placeholder 'Public Feedback Notes'.
- Save Private Template...:** A button with a save icon.
- Save Public Template...:** A button with a save icon.
- Cancel:** A button.
- Save Viewing:** A button.

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

Details Feedback

Email Form To Applicant SMS Form To Applicant

★★★★★ Location

★★★★★ Value for Money

★★★★★ Attributes

Private Feedback ~ Applicant Feedback: lovely house

Public Feedback Public Feedback Notes

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

Cancel Save Viewing

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

Viewing Feedback

Email Form To Applicant SMS Form To Applicant

★★★★★ Location

★★★★★ Value for Money

★★★☆☆ Attributes

Private Feedback Select feedback template nice property

Public Feedback Select feedback template nice property

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

Cancel Save Viewing Save Viewing & Close

Viewings Applicant Feedback

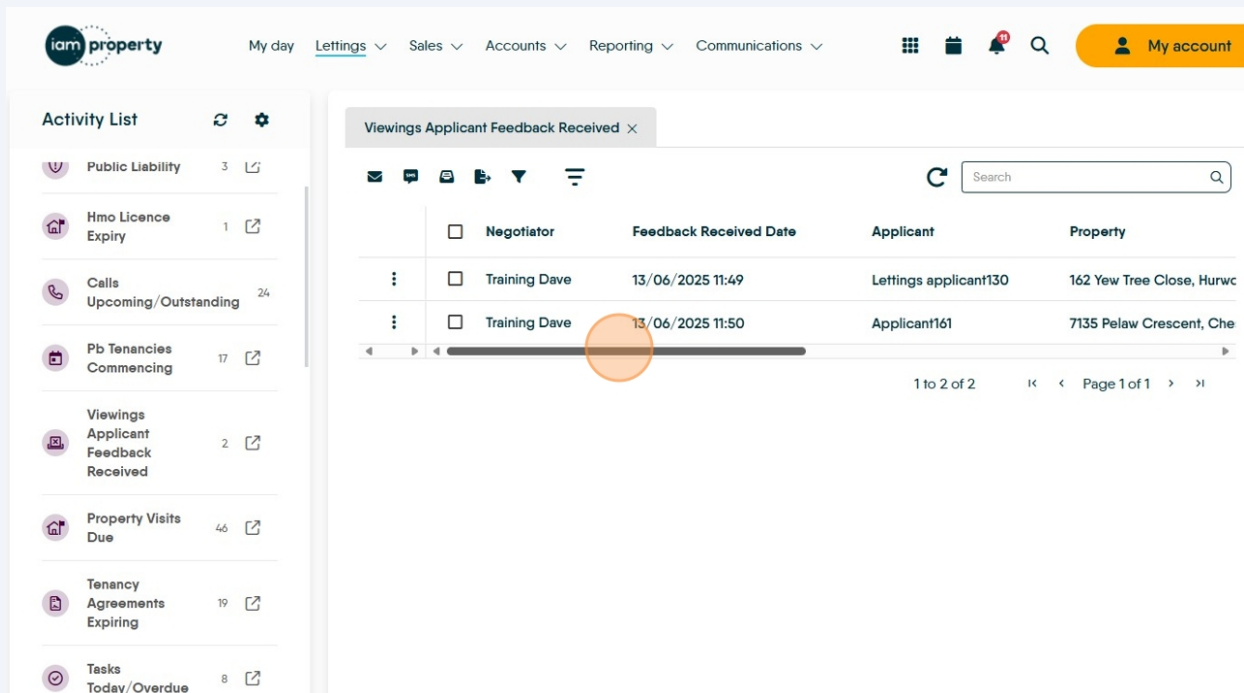
- 17 This section would be used when the Viewer has responded to the automatically sent (or manually sent) viewing email or SMS.

- 18 Click "Viewings Applicant Feedback Received"

The screenshot displays a software interface with a sidebar on the left titled "Activity List" and a main content area on the right. The sidebar contains a list of activity items, each with an icon, a text label, a count, and a link icon. The item "Viewings Applicant Feedback Received" is highlighted with an orange circle. The main content area features a large icon of a document with a list and the text "Please select an activity list item to begin".

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

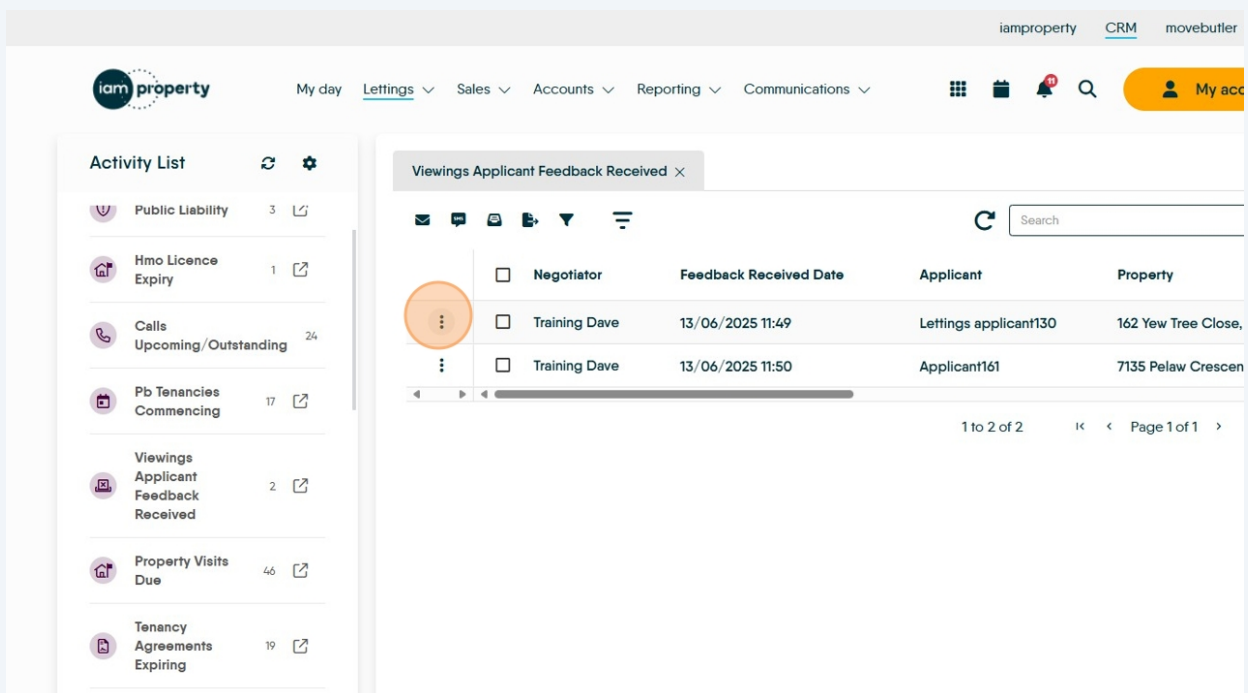
19 Click here.



The screenshot shows the 'iamproperty' CRM interface. On the left is an 'Activity List' sidebar with various categories and counts. The main area displays a table titled 'Viewings Applicant Feedback Received'. The table has columns for 'Negotiator', 'Feedback Received Date', 'Applicant', and 'Property'. Two rows are visible, both with 'Training Dave' as the negotiator. The second row, for 'Applicant161', has a date of '13/06/2025 11:50' which is highlighted by an orange circle. The table is on 'Page 1 of 1'.

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

20 Click here.



This screenshot is similar to the previous one but highlights a different element. An orange circle is placed over the three-dot menu icon in the first column of the 'Viewings Applicant Feedback Received' table, next to the first row. The rest of the interface, including the sidebar and table data, is identical to the previous screenshot.

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

21 Click "Open Viewing"

The screenshot shows the 'Activity List' on the left and the 'Viewings Applicant Feedback Received' table on the right. The 'Open Viewing' option in the context menu is highlighted with an orange circle.

Activity List

- 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

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 Crescen

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Context Menu Options:

- 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

22 Click "Feedback"

The screenshot shows the 'Edit Viewing' modal with the 'Feedback' tab highlighted with an orange circle.

Edit Viewing

Details

Viewing Multiple Properties ☐

Event title
Viewing - 162 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX

Status: Feedback Received

Viewing Confirmed ☐

Applicant

Select Applicant: Ms Lettings applicant130

+ Add New Applicant

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

+ 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.

The screenshot shows a 'Feedback' form with two tabs: 'Details' and 'Feedback'. The 'Feedback' tab is active. At the top, there are two orange buttons: 'Email Form To Applicant' and 'SMS Form To Applicant'. Below these are three star rating sections: 'Location' (5 stars), 'Value for Money' (3 stars), and 'Attributes' (4 stars). Underneath the ratings are two text input areas: 'Private Feedback' and 'Public Feedback'. The 'Private Feedback' area contains the text: '~ Applicant Feedback: not the property I thought it was too close to farm.' The 'Public Feedback' area is empty. Below these text areas are two buttons: 'Save Private Template...' and 'Save Public Template...'. At the bottom of the form are two buttons: 'Cancel' and 'Save Viewing'. An orange circle highlights the 'Save Public Template...' button, indicating the next step in the process.

24

Click "Save Viewing"

This screenshot is identical to the one above, showing the 'Feedback' form. However, in this version, an orange circle highlights the 'Save Viewing' button at the bottom right of the form, indicating the final step to save the feedback.

Adding Feedback via the Property Record

25

From the property record
Click "Viewings"

The screenshot displays the 'iamproperty' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar lists various modules: Compliance, Information, Stats, Marketing, Media, Rooms, Portals, Viewings (highlighted with an orange circle), Offers, NOI, Enquiries, and Key Control. The main content area shows a property record for '57 Elton Parade, Darlington, DL3 8PJ' with a default price of £975,000, 5 bedrooms, and 5 bathrooms. The lead vendor is 'Mrs Margaret Morgan'. The 'Viewings' section is active, showing a property picture and a 'Content Approval' status of 'Vendor has approved this content'. The 'Property Address' section shows the postcode 'DL3 8PJ' and the full address '57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK'.

iamproperty CRM movebutle

My day Lettings Sales Accounts Reporting Communications

57 Elton Parade, Darlington, DL3 8PJ |
Default £975,000 | 5 | 5 Available

Lead vendor: Mrs Margaret Morgan View Vendors

Reference Negotiator David-George Morgan Branch Morgan & Co Status For Sale

PROPERTY PICTURES Upload

Content Approval
✓ Vendor has approved this content

Property Address Edit Address

Postcode DL3 8PJ

Address 57 Elton Parade, Darlington, County Durham, DL3 8PJ, UK

26 Click here.

+ 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

2 Viewings Found

22 May 2025
13:15 - 13:45

SA

Sales applicant28
zagg.dave@gmail.com
0785349522

★★★★★

Confirmed

Training Da...

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

Details

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

Status
Booked

Viewing Confirmed

Applicant

Select 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

Property

28

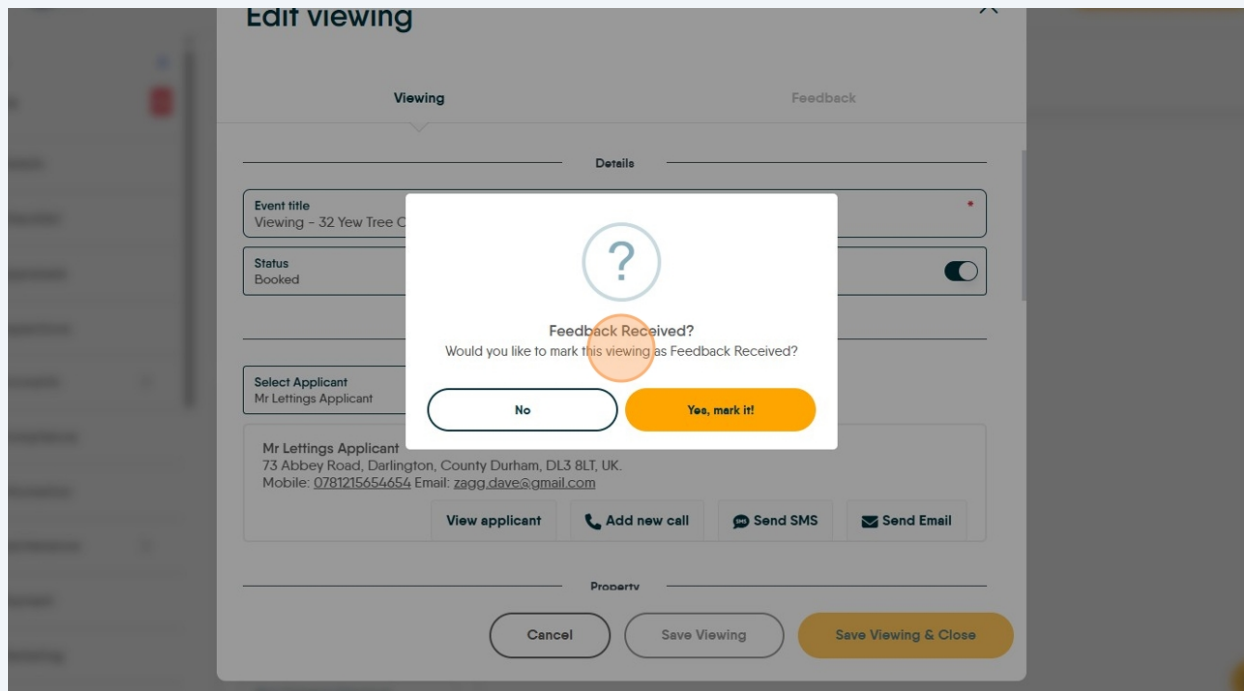
To keep your feedback private, use the 'Private Feedback' option, this will mean any feedback left does not show in the Portals. Click the "Public Feedback Notes" field to make feedback available in the portals. Once completed, click "Save Viewing & Close"

The screenshot shows a mobile application interface for providing feedback. At the top, there are two tabs: 'Viewing' and 'Feedback'. Below the tabs are two orange buttons: 'Email Form To Applicant' and 'SMS Form To Applicant'. The form is divided into two columns. The left column has a star rating (☆☆☆☆), a 'Location' field, a 'Private Feedback' section with a 'Select feedback template' dropdown and a 'Private Feedback Notes' text area, and a 'Save Private Template...' button. The right column has a star rating (☆☆☆☆), a 'Value for Money' field, an 'Attributes' field, a 'Public Feedback' section with a 'Select feedback template' dropdown and a 'Public Feedback Notes' text area, and a 'Save Public Template...' button. The 'Public Feedback Notes' field is highlighted with an orange circle. At the bottom, there are three buttons: 'Cancel', 'Save Viewing', and 'Save Viewing & Close'.

This screenshot shows the same feedback form as the previous one, but with the 'Public Feedback Notes' field now containing the text 'public feedback goes here'. The 'Save Viewing & Close' button at the bottom right is highlighted with an orange circle.

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.

