

Viewing and Managing Viewer Feedback for a Property Viewing



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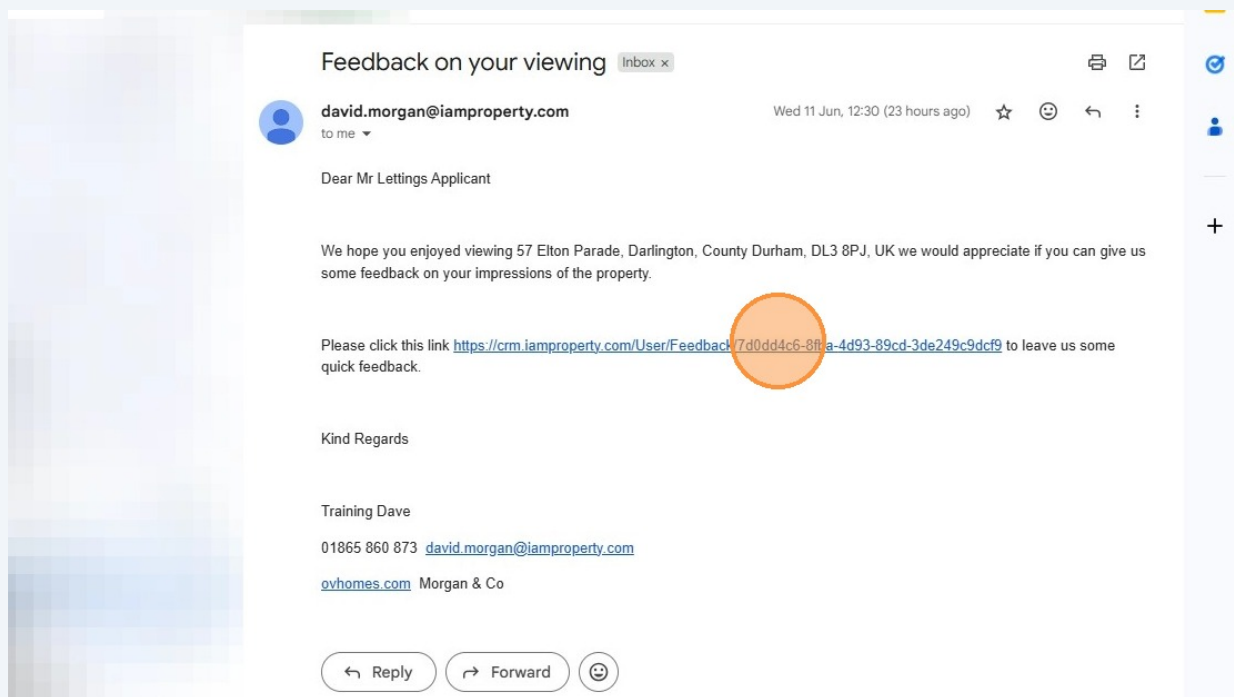
If you have enabled the Viewing Templates and set the Auto Send option your viewer will get the request for the feedback via email or SMS (as set by you).

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 (**from start of the viewing**) is set by You, creating this is covered in another guide.

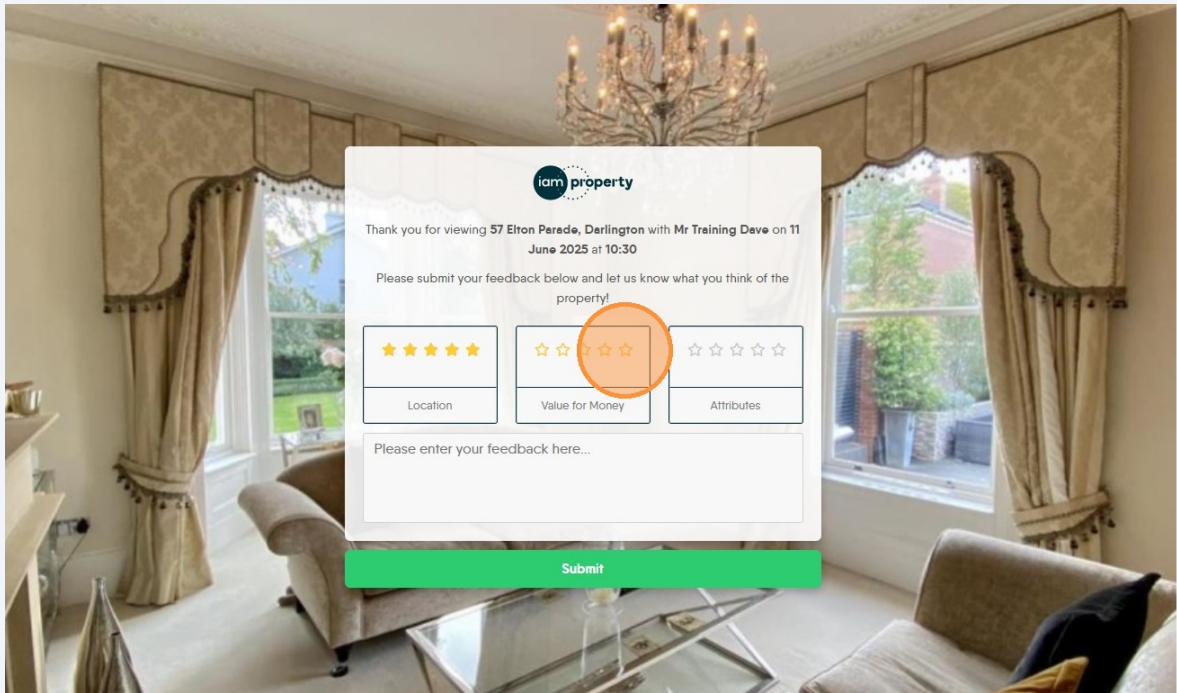
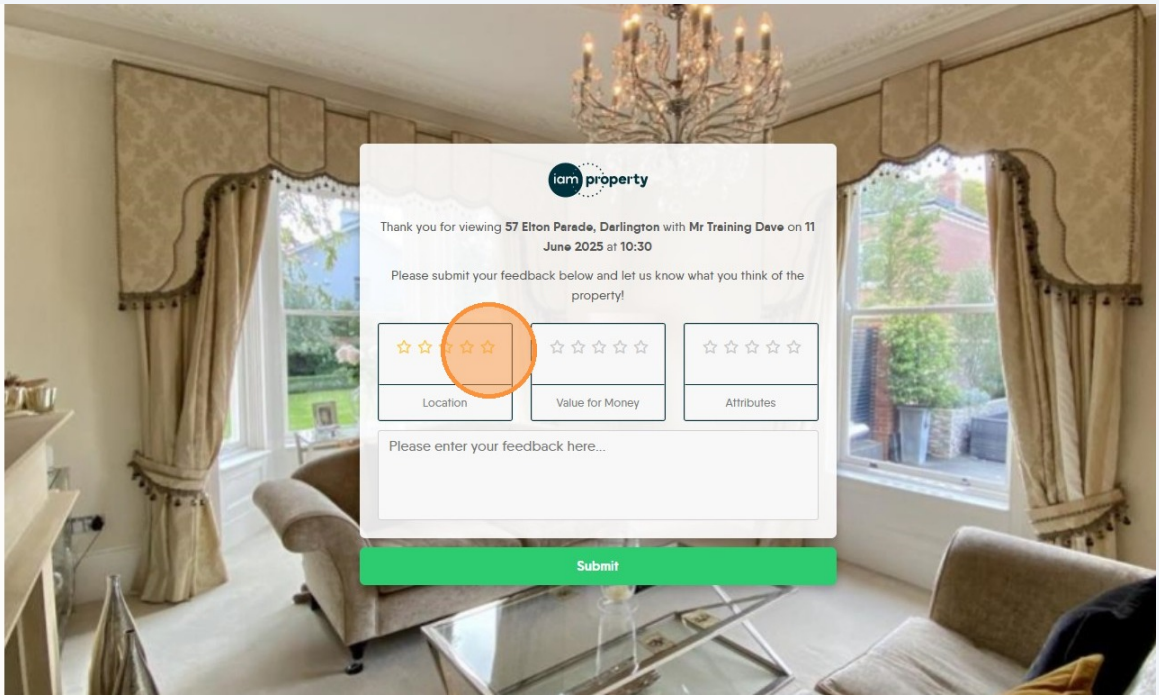
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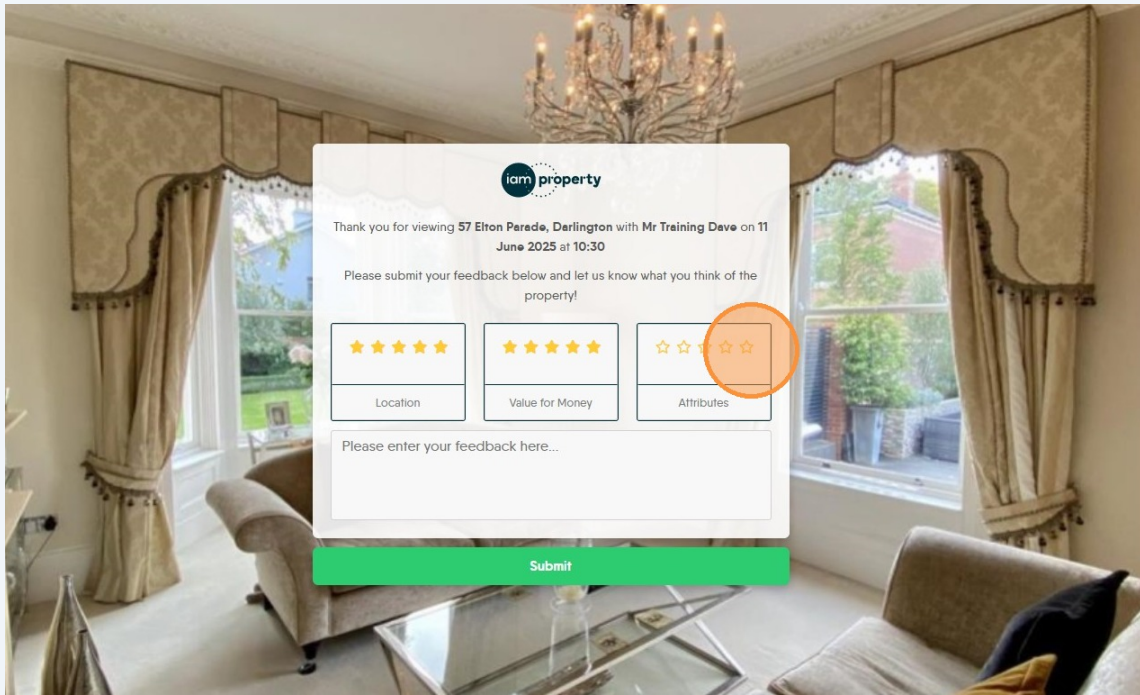
Click the link in the email



3

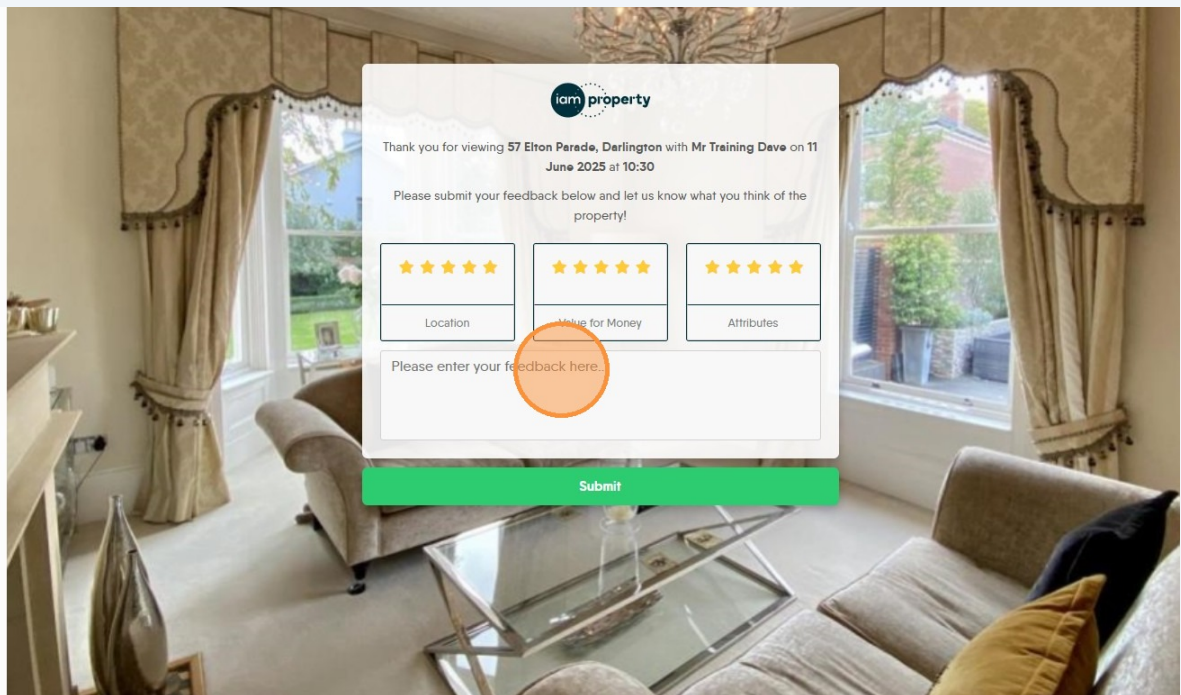
The Viewer will be taken to this screen where they can leave their feedback. Click here.

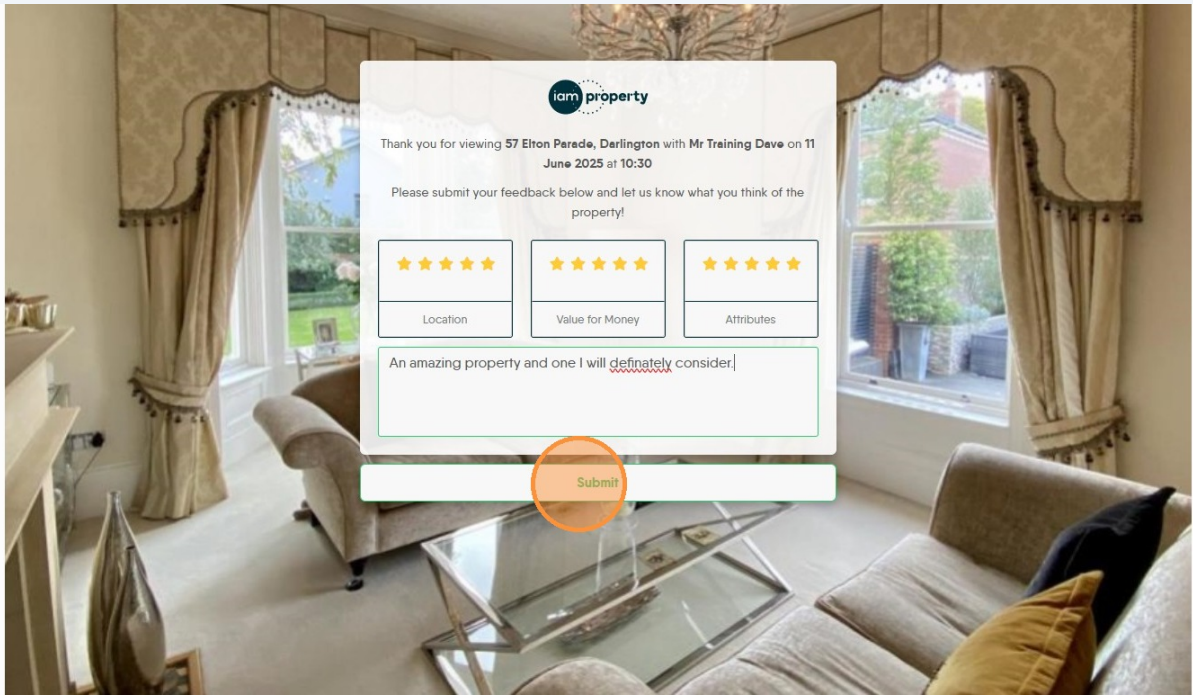




4

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





Agent Actions

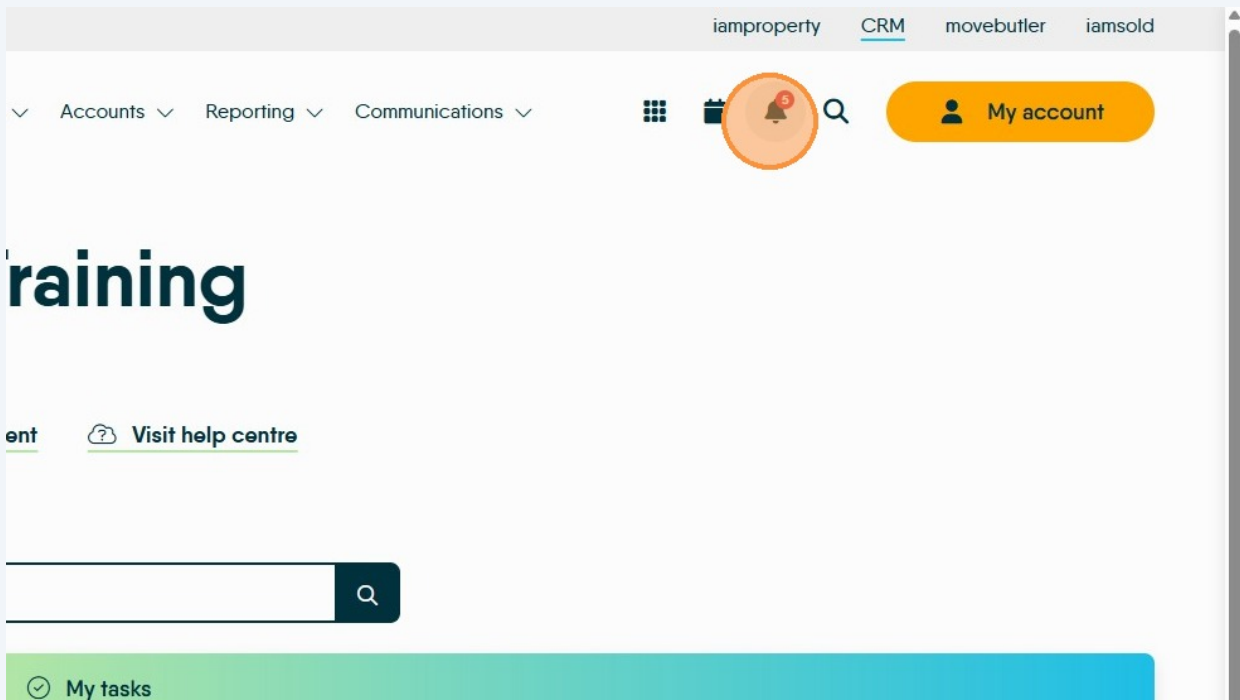
5

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.

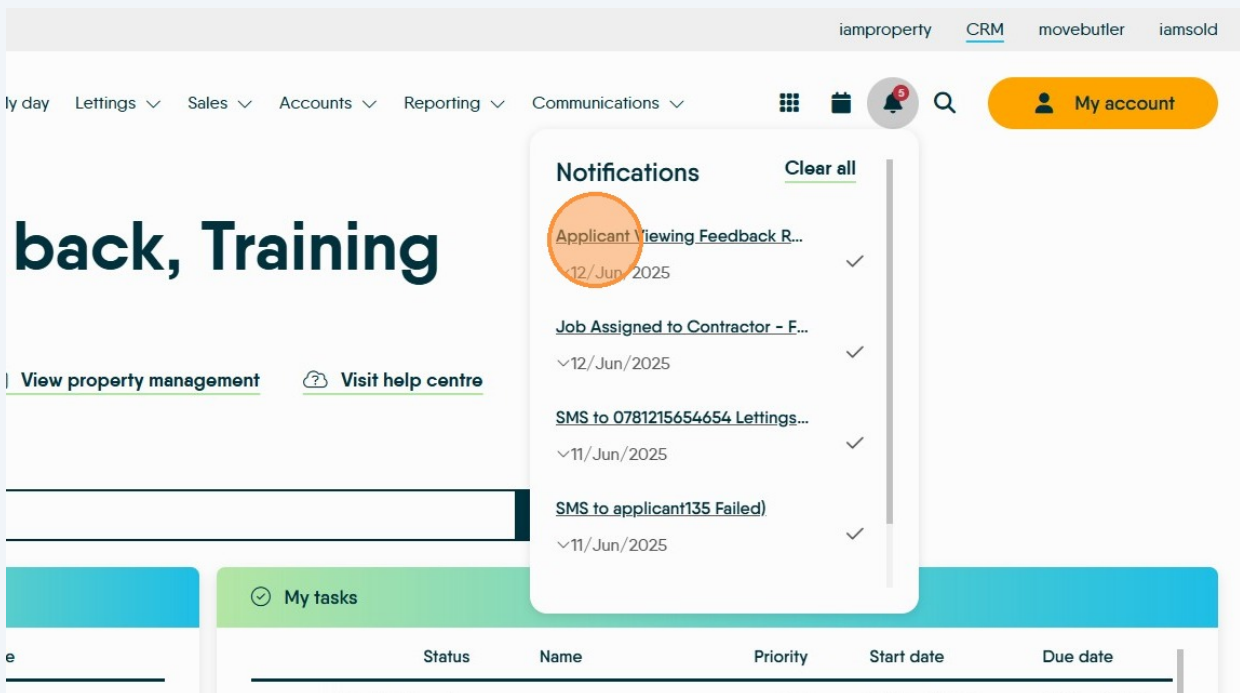
6

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 a CRM dashboard with a navigation bar at the top containing 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below the navigation bar are tabs for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A 'My account' button is on the right. The main content area features a large heading 'I come back, Training' and three buttons: 'Add New Record', 'View property management', and 'Visit help centre'. A 'Records' section is partially visible. A 'Notifications' dropdown is open, showing a notification for 'Applicant Viewing Feedback R...' dated '12/Jun/2025'. The notification text reads: '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 is a 'My tasks' table with columns for Status, Name, Priority, Start date, and Due date.

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 x Viewings Requiring Feedback x

	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

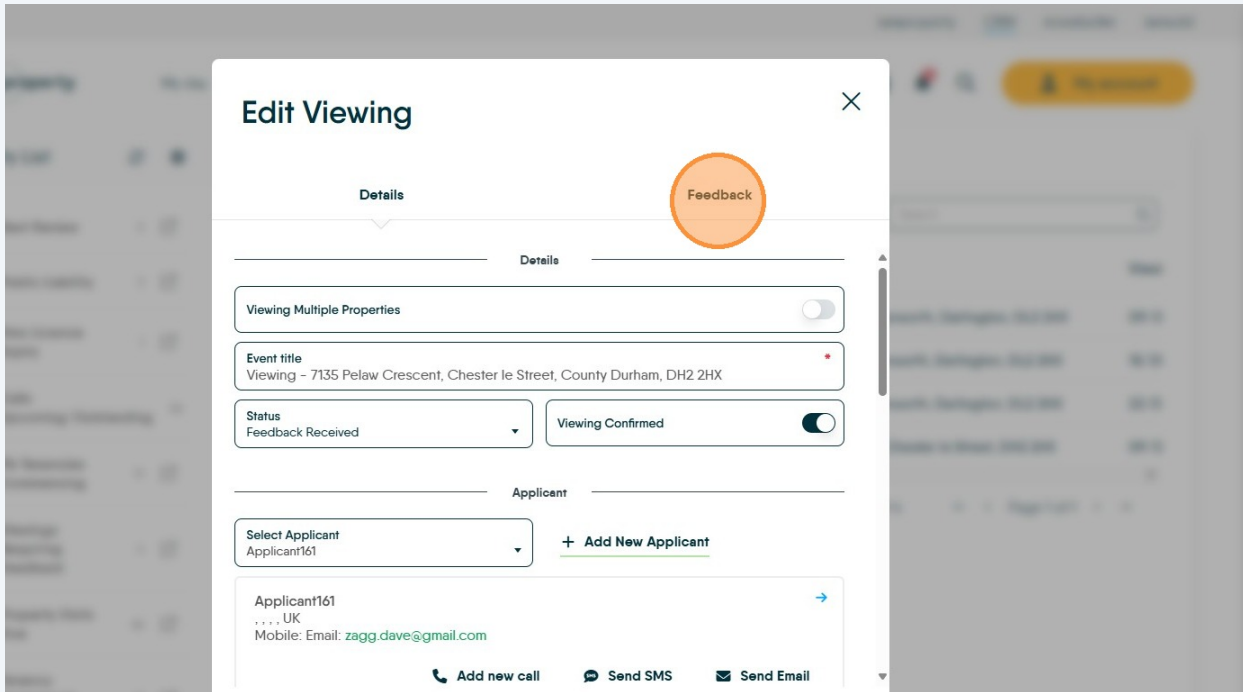
Applicant - Offer Questions Sent x Viewings Requiring Feedback x

	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

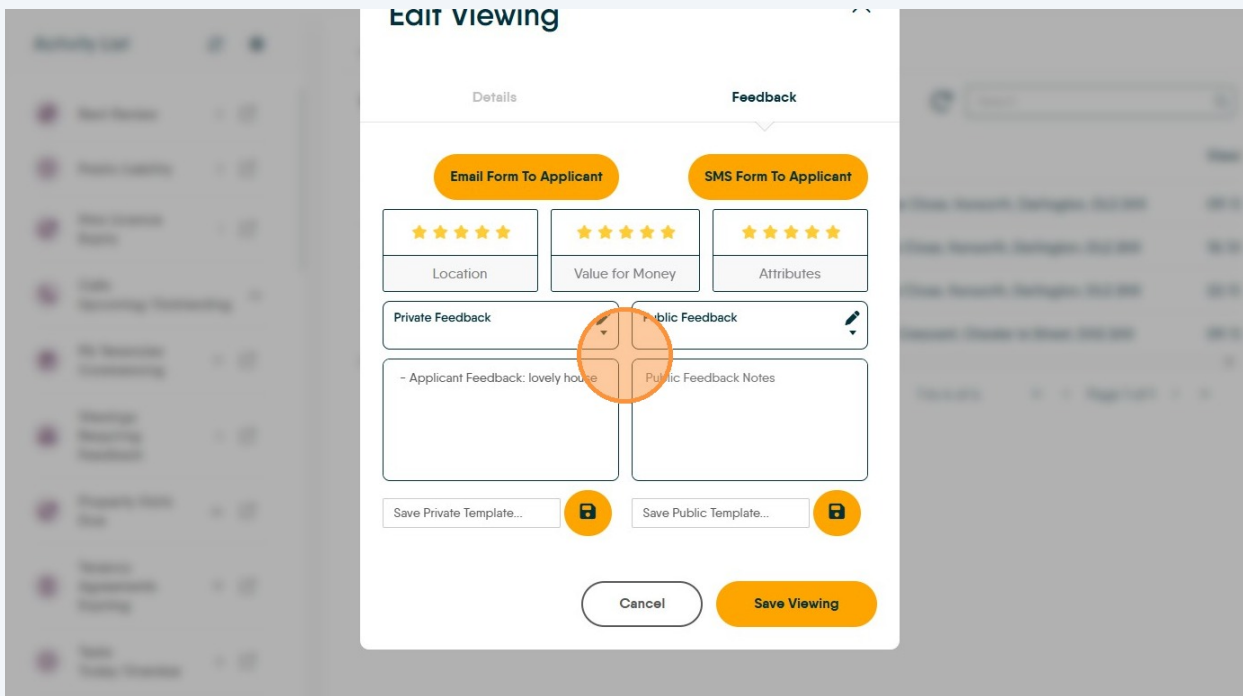
1 to 4 of 4 Page 1 of 1

- 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

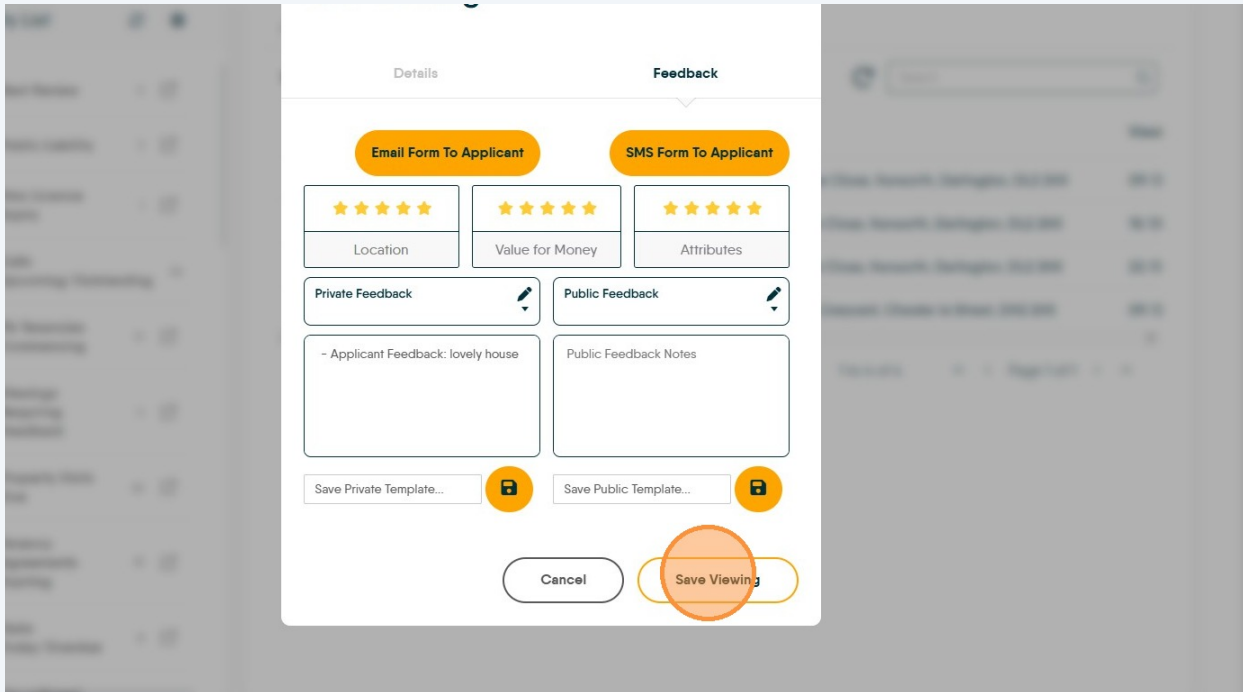
13 Click "Feedback"



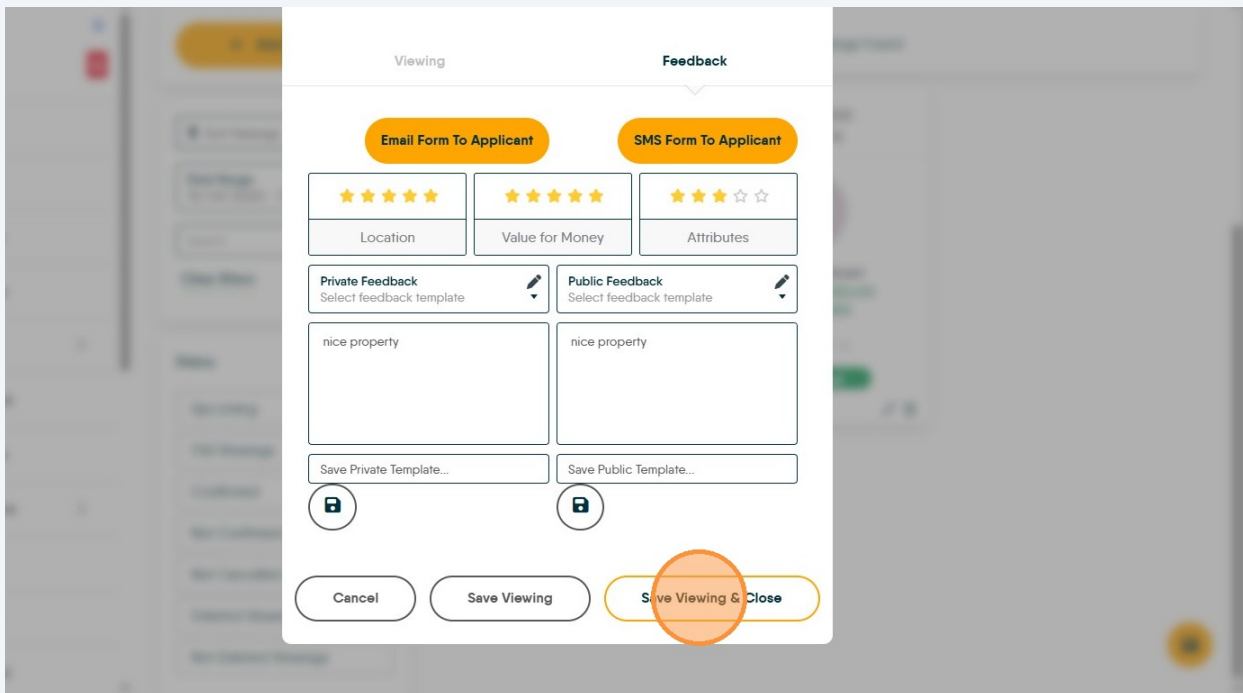
14 Click "Public Feedback" to add feedback the Landlord or Vendor can see or click Private feedback to not display the feedback.



- 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 with an 'Activity List' on the left and a main content area on the right. The 'Activity List' contains the following items:

Activity	Count	Action
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

The 'Viewings Applicant Feedback Received' item is highlighted with an orange circle. The main content area on the right contains a message: 'Please select an activity list item to begin' with a calendar icon above it.

19 Click here.

The screenshot shows the iamproperty dashboard. On the left is an 'Activity List' with categories like Public Liability, Hmo Licence Expiry, Calls Upcoming/Outstanding, Pb Tenancies Commencing, Viewings Applicant Feedback Received, Property Visits Due, Tenancy Agreements Expiring, and Tasks Today/Overdue. 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 for 'Training Dave'. The second row's date, '13/06/2025 11:50', is circled in orange. The table also includes a search bar and pagination controls showing '1 to 2 of 2' items on 'Page 1 of 1'.

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

20 Click here.

This screenshot is similar to the one above but highlights a different element. The 'Viewings Applicant Feedback Received' table is shown with the first row's vertical ellipsis menu icon circled in orange. The table data is identical to the previous screenshot. The dashboard header includes navigation menus for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications', along with a search bar and a 'My account' button.

<input type="checkbox"/>	Negotiator	Feedback Received Date	Applicant	Property
<input type="checkbox"/>	Training Dave	13/06/2025 11:49	Lettings applicant130	162 Yew Tree Close,
<input type="checkbox"/>	Training Dave	13/06/2025 11:50	Applicant161	7135 Pelaw Crescen

21 Click "Open Viewing"

The screenshot shows a software interface with two main sections. On the left is an 'Activity List' with various categories and counts: 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), and Unconfirmed Viewings (29). On the right is a table titled 'Viewings Applicant Feedback Received'. The table has columns for 'Negotiator', 'Feedback Received Date', 'Applicant', and 'Property'. A context menu is open over the table, listing actions such as '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', and 'View Applicant'. The 'Open Viewing' option is highlighted with an orange circle.

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

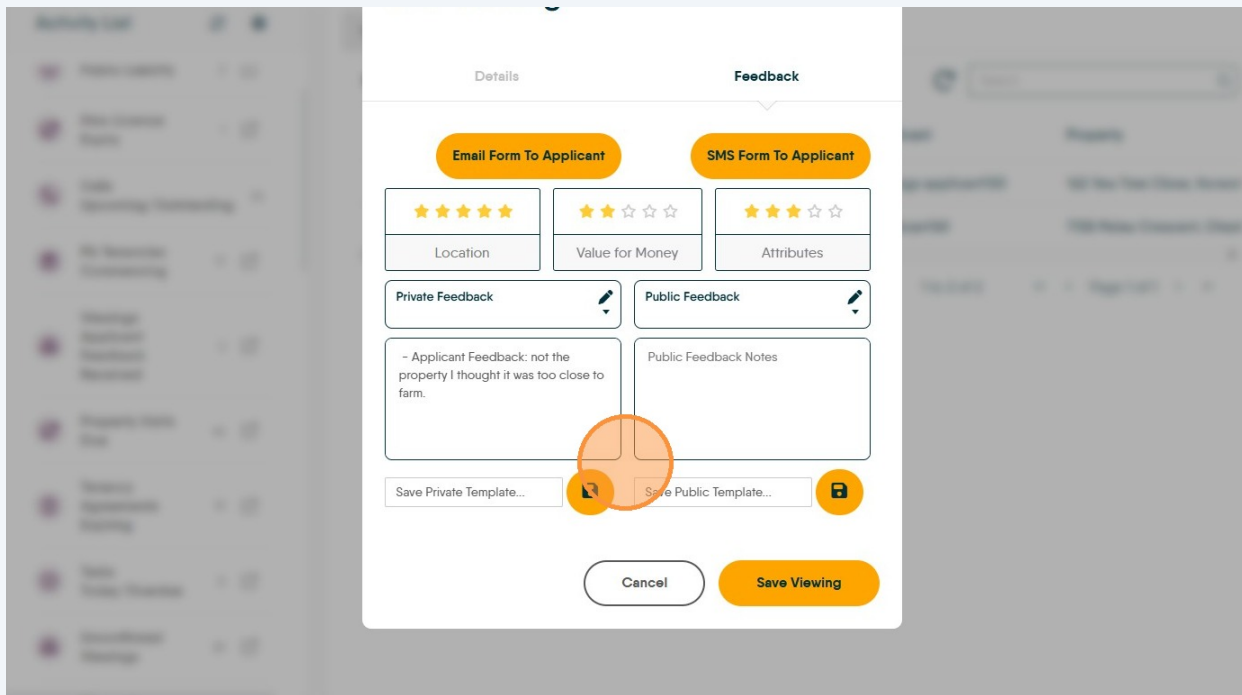
22 Click "Feedback"

The screenshot shows the 'Edit Viewing' modal window. The 'Details' tab is selected, and the 'Feedback' option is highlighted with an orange circle. The modal contains the following information:

- Viewing Multiple Properties:** A toggle switch that is currently turned off.
- Event title:** Viewing - 162 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX
- Status:** Feedback Received (selected from a dropdown menu)
- Viewing Confirmed:** A toggle switch that is currently turned on.
- Applicant:** Select Applicant (Ms Lettings applicant130) with an '+ Add New Applicant' button.
- Applicant details:** Ms Lettings applicant130, UK, Mobile: 3545113, Email: zaggy.dave@gmail.com
- Actions:** Add new call, Send SMS, Send Email

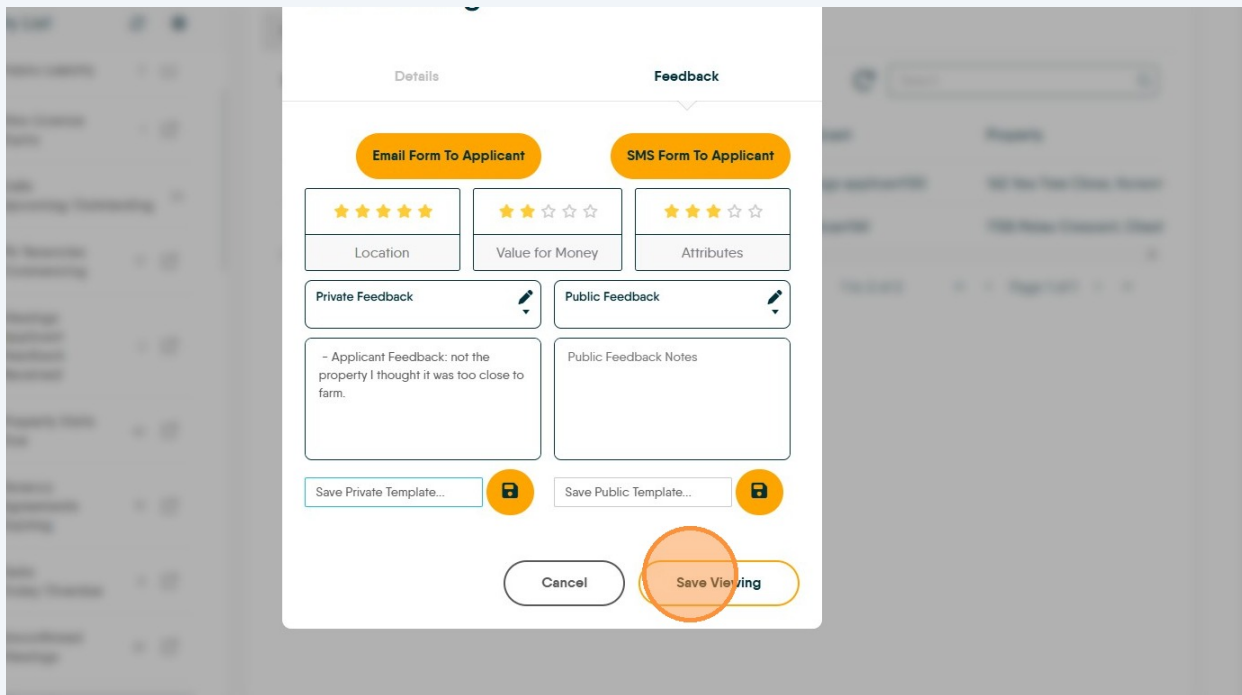
23

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"

The screenshot shows the iamproperty CRM interface. The top navigation bar includes 'iamproperty', 'CRM', and 'movebutle'. The main navigation menu contains 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar lists various modules: Compliance, Information, Stats, Marketing, Media, Rooms, Portals, Viewings, Offers, and NOI. The 'Viewings' module is highlighted with an orange circle. The main content area displays property details for '57 Elton Parade, Darlington, DL3 8PJ' with a default price of £975,000, 5 bedrooms, and 5 bathrooms. It also shows the lead vendor 'Mrs Margaret Morgan' and a 'View Vendors' button. Below this, there are fields for 'Reference', 'Negotiator' (David-George Morgan), 'Branch' (Morgan & Co), and 'Status' (For Sale). The 'PROPERTY PICTURES' section features an 'Upload' button and a photo of the property at night. To the right, the 'Content Approval' section shows a checkmark indicating 'Vendor has approved this content'. The 'Property Address' section includes an 'Edit Address' button and a 'Postcode' field with the value 'DL3 8PJ'.

This screenshot is identical to the one above, showing the same CRM interface. However, in this version, the 'Viewings' module in the left sidebar is highlighted with an orange circle, indicating the step to click on it. The rest of the interface, including the property details for '57 Elton Parade, Darlington, DL3 8PJ', the vendor information, and the content approval status, remains the same.

26 Click here.

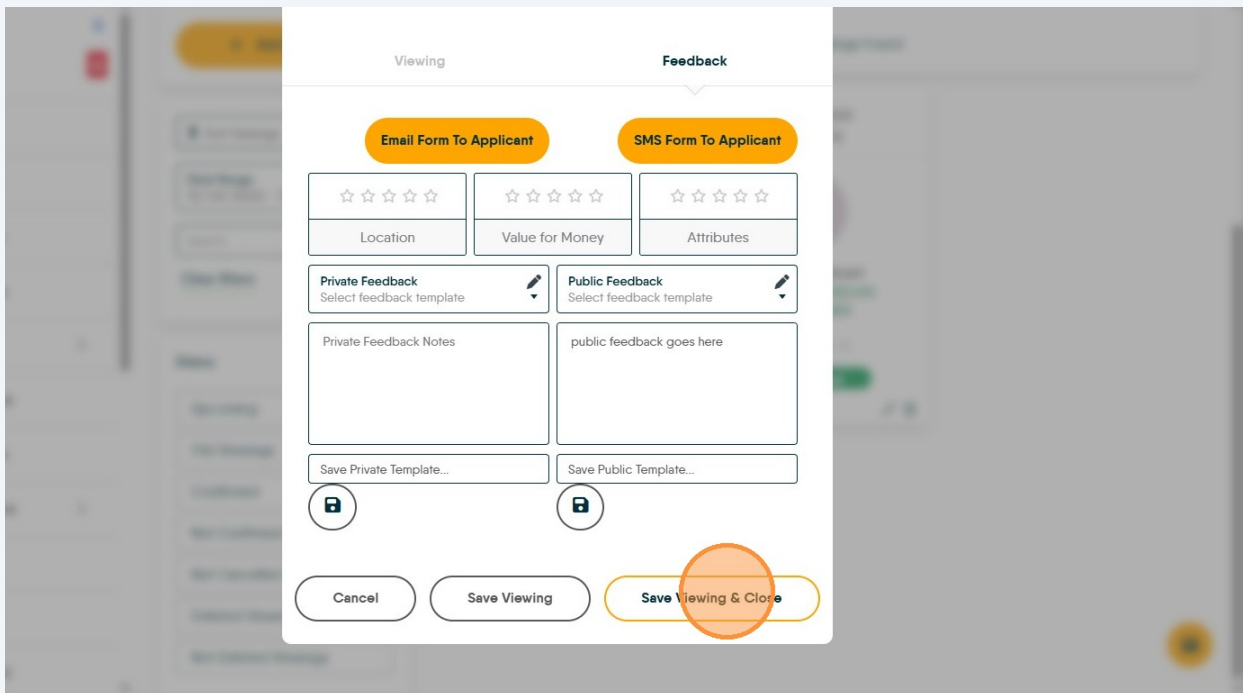
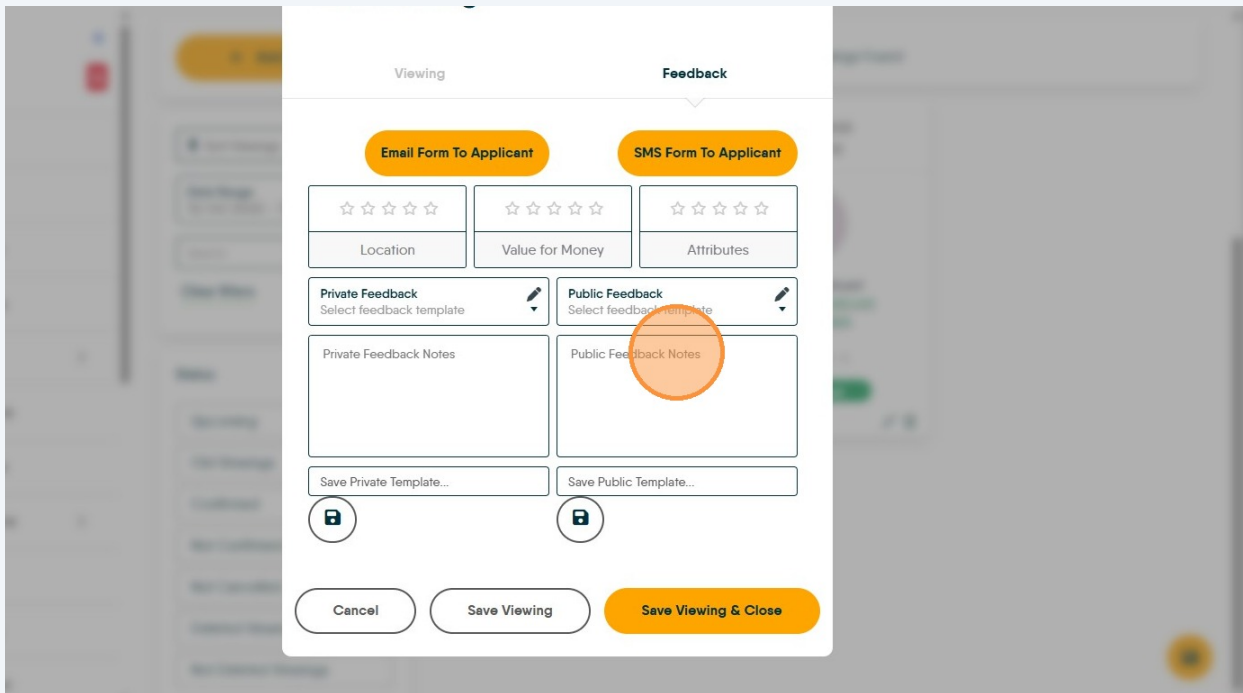
The screenshot shows a web interface for managing viewings. On the left is a sidebar with navigation options. The main area features a filter panel on the left and a grid of viewing cards on the right. The filter panel includes a '+ Add Viewing' button, a 'Sort Viewings' dropdown, a 'Date Range' field set to '12/03/2025 - 12/07/2025', a search bar, and a 'Clear filters' link. Below these are 'Status' filters: 'Upcoming', 'Old Viewings', 'Confirmed', 'Not Confirmed', 'Not Cancelled', 'Deleted Viewings', and 'Not Deleted Viewings'. The viewing cards display dates and times, applicant names (SA and LA), contact information, star ratings, and a 'Confirmed' status. An orange circle highlights the 'Edit' button on the bottom right of the second card. A lock icon is visible in the bottom right corner of the interface.

27 Click "Feedback"

The screenshot shows the 'Edit viewing' modal form. At the top, there are two tabs: 'Viewing' and 'Feedback', with 'Feedback' highlighted by an orange circle. The form is divided into sections: 'Details' with an 'Event title' field containing 'Viewing - 32 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX'; 'Status' with a 'Booked' dropdown and a 'Viewing Confirmed' toggle switch; 'Applicant' with a 'Select Applicant' dropdown set to 'Mr Lettings Applicant' and an '+ Add New Applicant' link; and contact information for 'Mr Lettings Applicant' including address, mobile, and email. At the bottom, there are four buttons: 'View applicant', 'Add new call', 'Send SMS', and 'Send Email'. The 'Property' section is partially visible at the bottom.

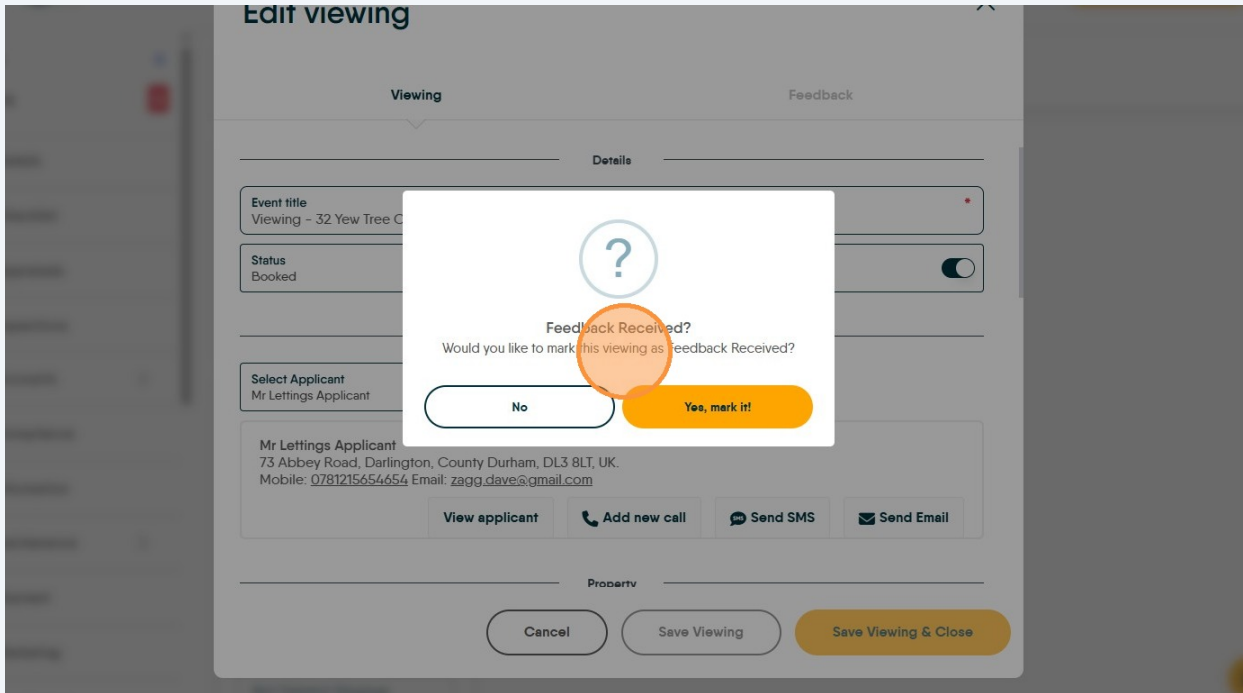
28

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.

