

Core Process Simplification - Adding a New Lettings Viewing Appointment



This guide provides a step-by-step process for adding a new sales viewing appointment in the CRM system, using the NEW Core Process Simplification method.

By following these instructions, users can streamline their appointment setup, reduce errors, and enhance their productivity. It's an essential resource for anyone looking to optimise their use of the CRM platform and improve client interactions. Viewing this guide will empower users to navigate the system with confidence and ease.

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

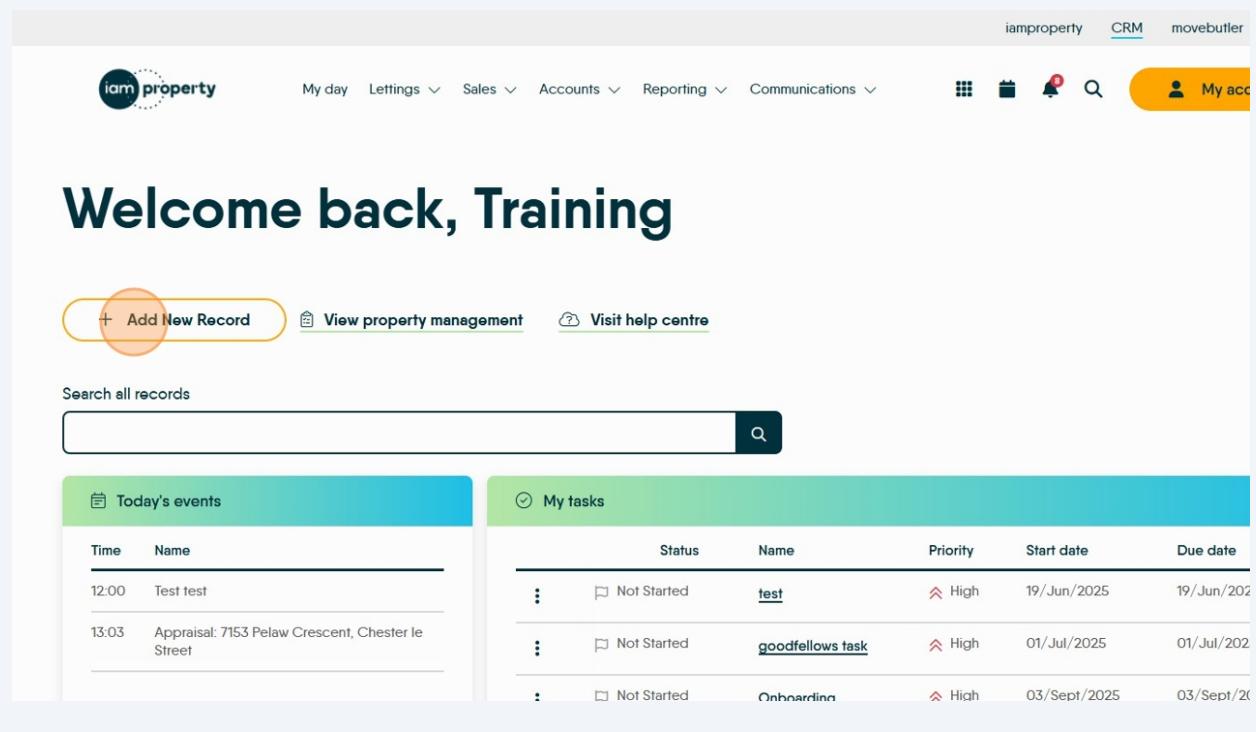
The screenshot shows the 'My Day' screen of the iam property CRM. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. Below the navigation bar, a large green header says 'Welcome back, Training'. Underneath the header, there are two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section lists two items: '12:00 Test test' and '13:03 Appraisal: 7153 Pelaw Crescent, Chester le Street'. The 'My tasks' section lists three tasks, each with a status of 'Not Started': 'test' (due 19/Jun/2025), 'goodfellows task' (due 01/Jul/2025), and 'Onboarding' (due 03/Sept/2025).



There are 2 key places that a viewing record can be added from. These are the My Day screen and the Quick Access (aka Bento) menu. Once the option is selected the process from there on is identical.

- 2 From the My Day screen

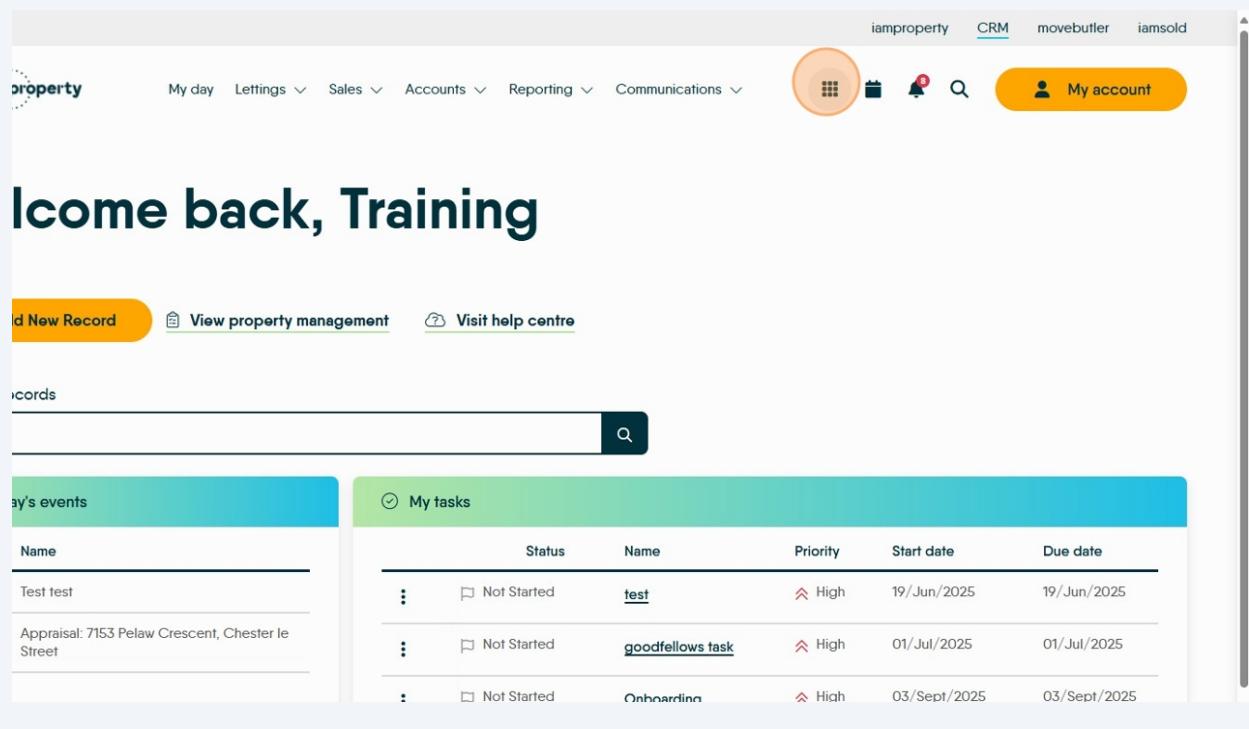
3 Click "Add New Record"



The screenshot shows the iam property CRM dashboard. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and a search bar. Below the navigation bar, the text 'Welcome back, Training' is displayed. There are three main sections: 'Today's events' (listing 'Test test' at 12:00 and 'Appraisal: 7153 Pelaw Crescent, Chester le Street' at 13:03), 'My tasks' (listing three tasks: 'test' (Not Started, High priority, due 19/Jun/2025), 'goodfellows task' (Not Started, High priority, due 01/Jul/2025), and 'Onboarding' (Not Started, High priority, due 03/Sept/2025)), and a 'Search all records' bar.

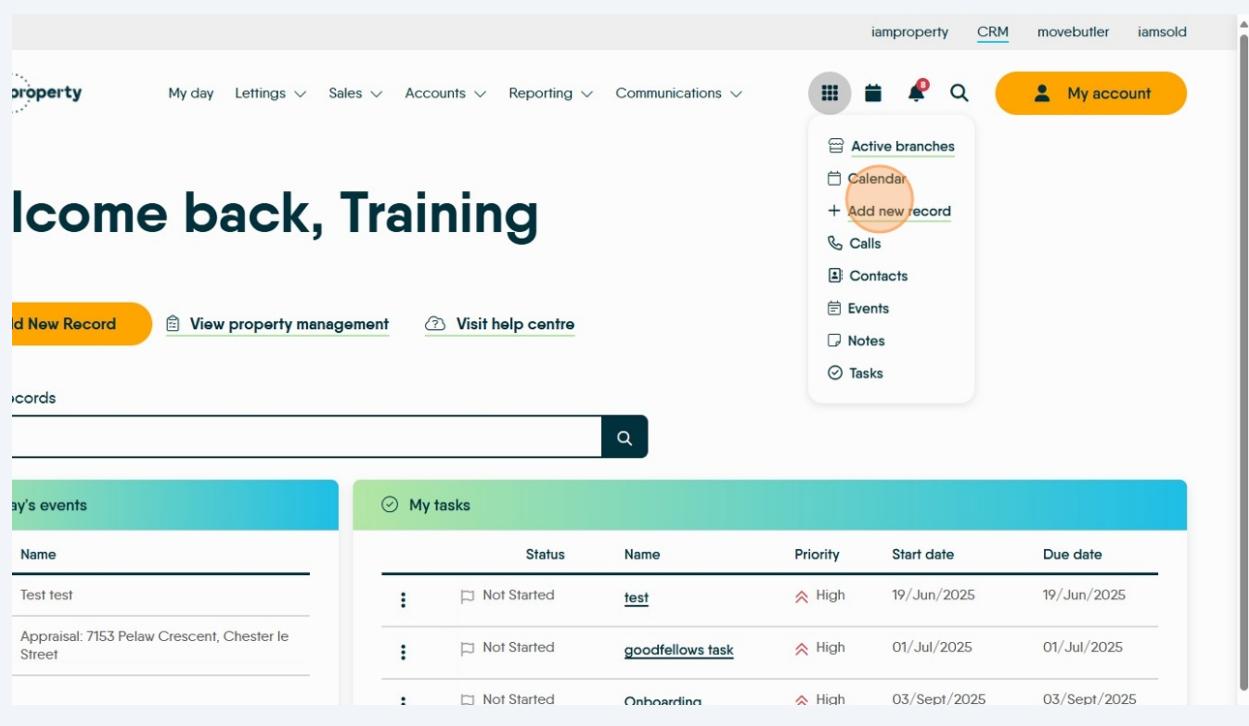
4 From the 'Quick Access' menu

5 Click here



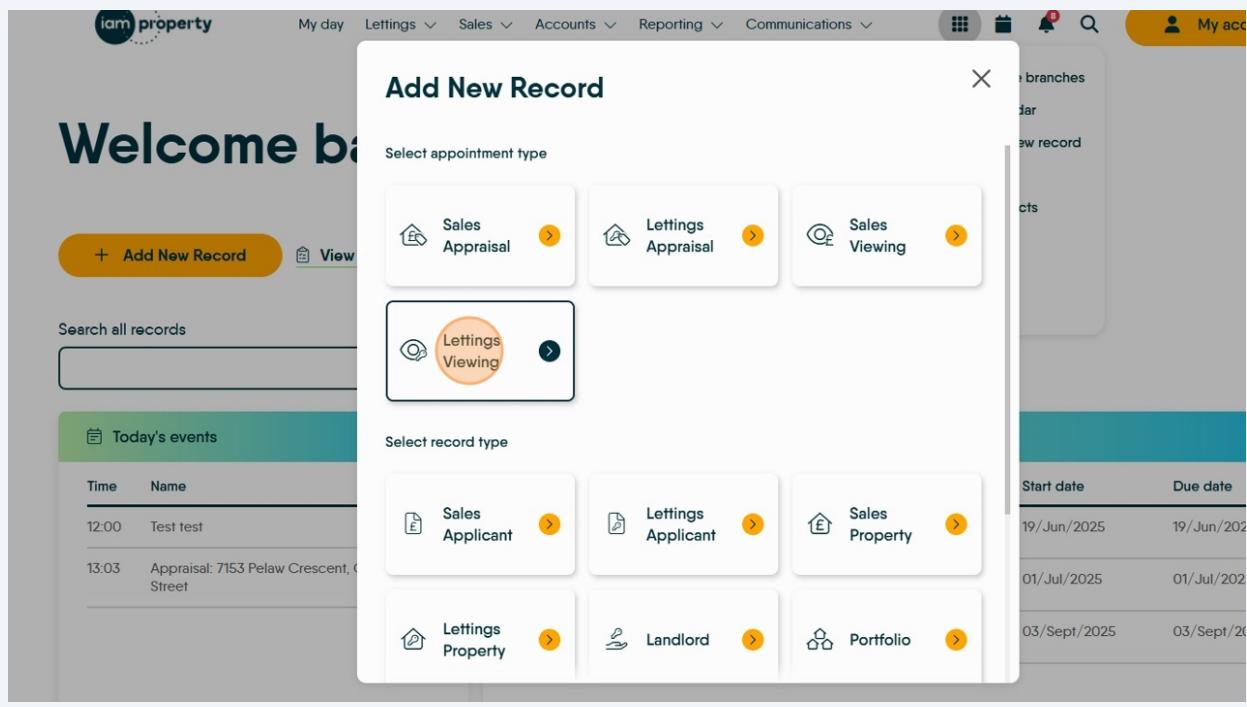
The screenshot shows the iamsold CRM interface. At the top, there is a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', 'iamproperty' (highlighted in orange), 'CRM' (highlighted in blue), 'movebutler', and 'iamsold'. Below the navigation bar is a search bar and a 'My account' button. The main content area features a large title 'Income back, Training'. Below the title are three buttons: 'Add New Record' (orange), 'View property management' (grey), and 'Visit help centre' (grey). The 'My tasks' section is displayed, showing a table with columns: Status, Name, Priority, Start date, and Due date. The table contains three tasks: 'test' (High priority, Jun 19, 2025), 'goodfellows task' (High priority, Jul 01, 2025), and 'Onboarding' (High priority, Sep 03, 2025). The 'My events' section is also visible on the left.

6 Click "Add new record"



The screenshot shows the iamsold CRM interface. The sidebar on the right is highlighted in orange and contains a list of options: 'Active branches', 'Calendar', '+ Add new record' (highlighted in orange), 'Calls', 'Contacts', 'Events', 'Notes', and 'Tasks'. The main content area features a large title 'Income back, Training'. Below the title are three buttons: 'Add New Record' (orange), 'View property management' (grey), and 'Visit help centre' (grey). The 'My tasks' section is displayed, showing a table with columns: Status, Name, Priority, Start date, and Due date. The table contains three tasks: 'test' (High priority, Jun 19, 2025), 'goodfellows task' (High priority, Jul 01, 2025), and 'Onboarding' (High priority, Sep 03, 2025). The 'My events' section is also visible on the left.

7 Click "Lettings Viewing"



8 You will arrive at this screen.

< Back to my day >> Create Lettings Viewing Appointment

Create Lettings Viewing Appointment

Primary Applicant

[Use existing record](#)

Title

Forename *

Surname *

Email *

Mobile phone

Phone number

Work phone

Branch *

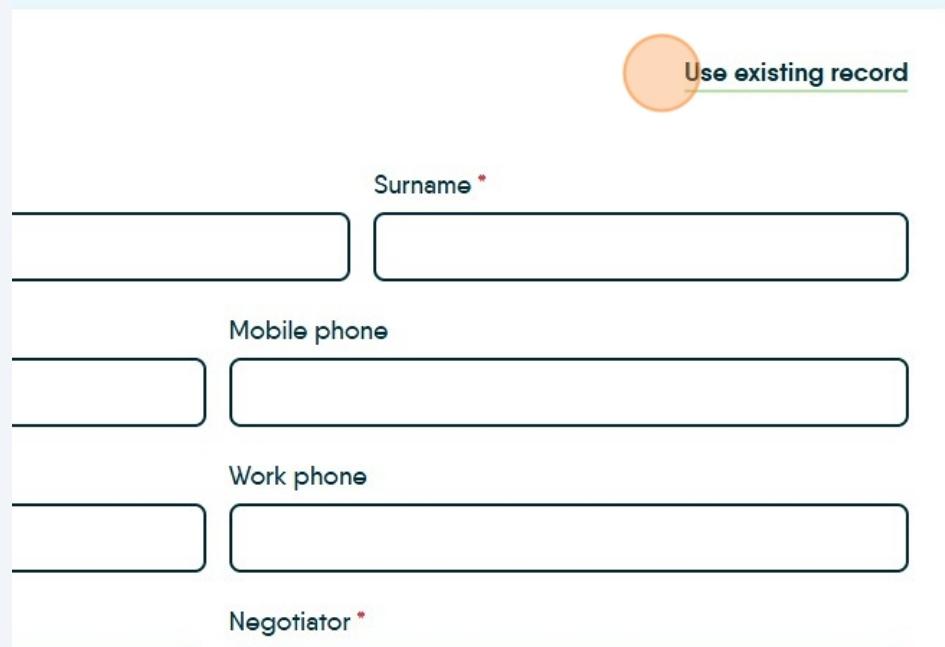
Negotiator *

Applicant's address (optional)

Search by postcode



9 If you are creating a viewing for an existing contact, click "**Use existing record**"



The screenshot shows a form for creating a viewing. At the top right, there is a green button labeled "Use existing record" with a green outline. Below this, there are four input fields arranged in a 2x2 grid. The top-left field is for "Surname *", the top-right for "Mobile phone", the bottom-left for "Work phone", and the bottom-right for "Negotiator *".

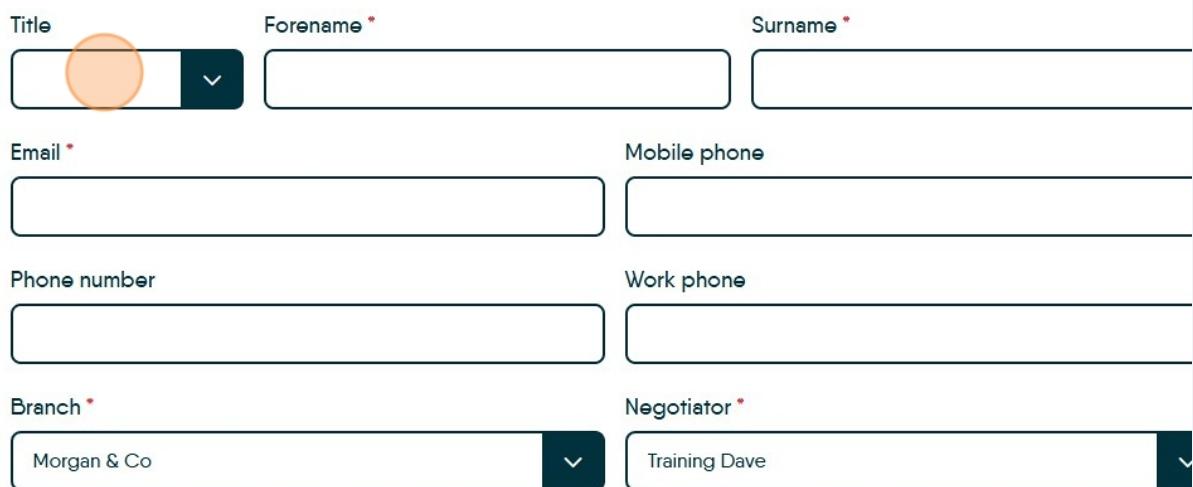
- 1 Applicant
- 2 Property
- 3 Viewing

10 Complete all, or as much of the details for the primary applicant as you can.

If there are more than 1 applicants, add the second applicant from the applicant record as a 'Linked Applicant' [[Click here to see how](https://scribehow.com/viewer/Linking_Applicants_in_CRM_1kYZYdDZSyG1EqgrSnM06g?referrer=search)](https://scribehow.com/viewer/Linking_Applicants_in_CRM_1kYZYdDZSyG1EqgrSnM06g?referrer=search)

Primary Applicant

[Use existing record](#)



The screenshot shows the "Primary Applicant" form. It includes fields for "Title", "Forename *", "Surname *", "Email *", "Mobile phone", "Phone number", "Work phone", "Branch *", and "Negotiator *". The "Title" dropdown, "Forename" field, "Surname" field, "Email" field, "Mobile phone" field, "Phone number" field, "Work phone" field, "Branch" dropdown, and "Negotiator" dropdown are all highlighted with orange circles.

11

If the applicant only has a mobile phone number, add this to both the 'Mobile phone' and 'Phone number' fields.

Primary Applicant

[Use existing record](#)

Title	Forename *	Surname *
Mr	David	Morgan
Email *	Mobile phone	
crm.training@iamproperty.com	078022200655	
Phone number	Work phone	
01865860871		
Branch *	Negotiator *	
Morgan & Co	Training Dave	

Applicant's address (optional)

Search by postcode

12

Click the **"Enter a full postcode"** field and add the applicants address.

Title	Forename	Surname
Mr	David	Morgan
Email *	Mobile phone	
crm.training@iamproperty.com	078022200655	
Phone number	Work phone	
01865860871		
Branch *	Negotiator *	
Morgan & Co	Training Dave	

Applicant's address (optional)

Search by postcode

Enter a full postcode

Or [enter address manually](#)

1 Applicant
2 Property
3 Viewing

13 Click "Continue"

Mr Forename: David Surname: Morgan

mail * Mobile phone
crm.training@iamproperty.com 078022200655

Phone number Work phone
01865860871

Branch * Negotiator *
Morgan & Co Training Dave

Applicant's address (optional)

Enter a full postcode

Enter a full postcode

Or enter address manually

- 1 Applicant
- 2 Property
- 3 Viewing

14 Click the "Search for a property" field and add the postcode details for the property the viewing is to be booked for. Select the address from the drop down menu

Primary Applicant

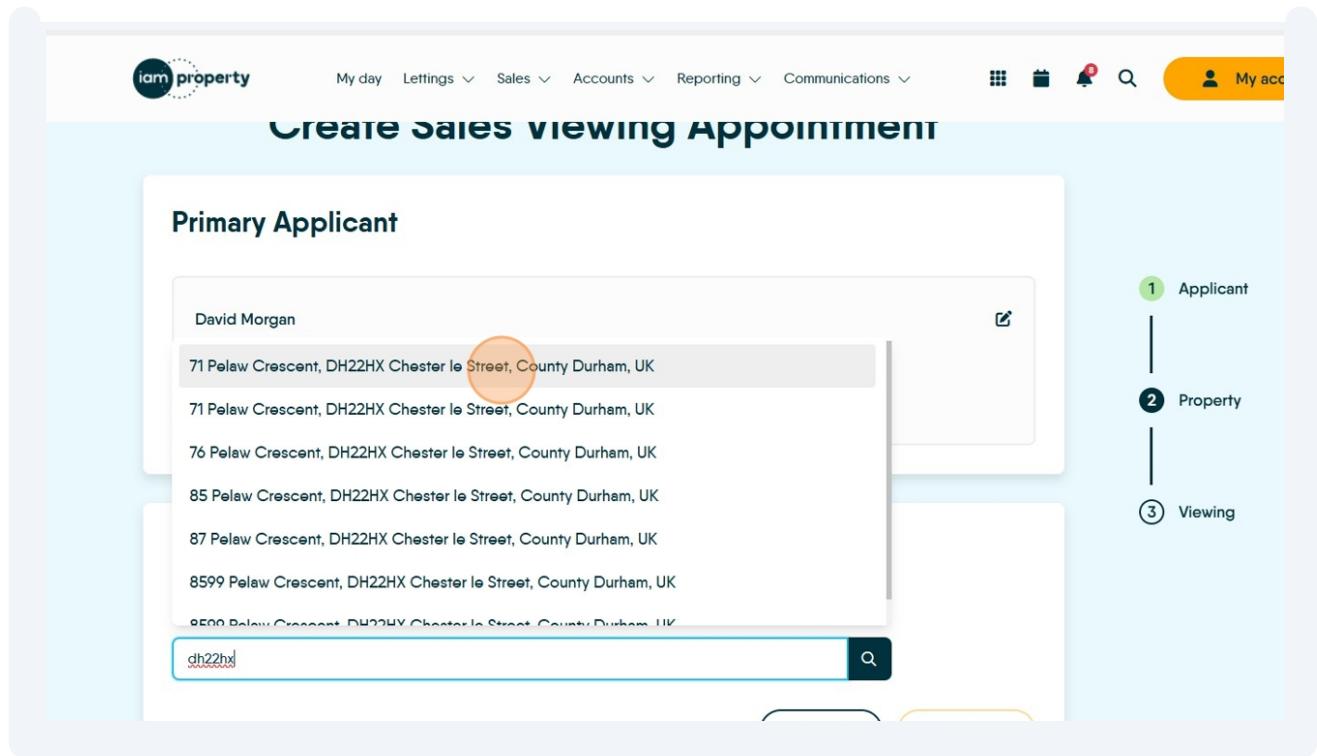
David Morgan
Address:
Email: crm.training@iamproperty.com
Mobile phone: 078022200655
Negotiator: Training Dave

- 1 Applicant
- 2 Property
- 3 Viewing

Property

Find existing property

Search for a property



My day Lettings Sales Accounts Reporting Communications

My account

Create Sales viewing Appointment

Primary Applicant

David Morgan

71 Pelaw Crescent, DH22HX Chester le Street, County Durham, UK

71 Pelaw Crescent, DH22HX Chester le Street, County Durham, UK

76 Pelaw Crescent, DH22HX Chester le Street, County Durham, UK

85 Pelaw Crescent, DH22HX Chester le Street, County Durham, UK

87 Pelaw Crescent, DH22HX Chester le Street, County Durham, UK

8599 Pelaw Crescent, DH22HX Chester le Street, County Durham, UK

8599 Pelaw Crescent, DH22HX Chester le Street, County Durham, UK

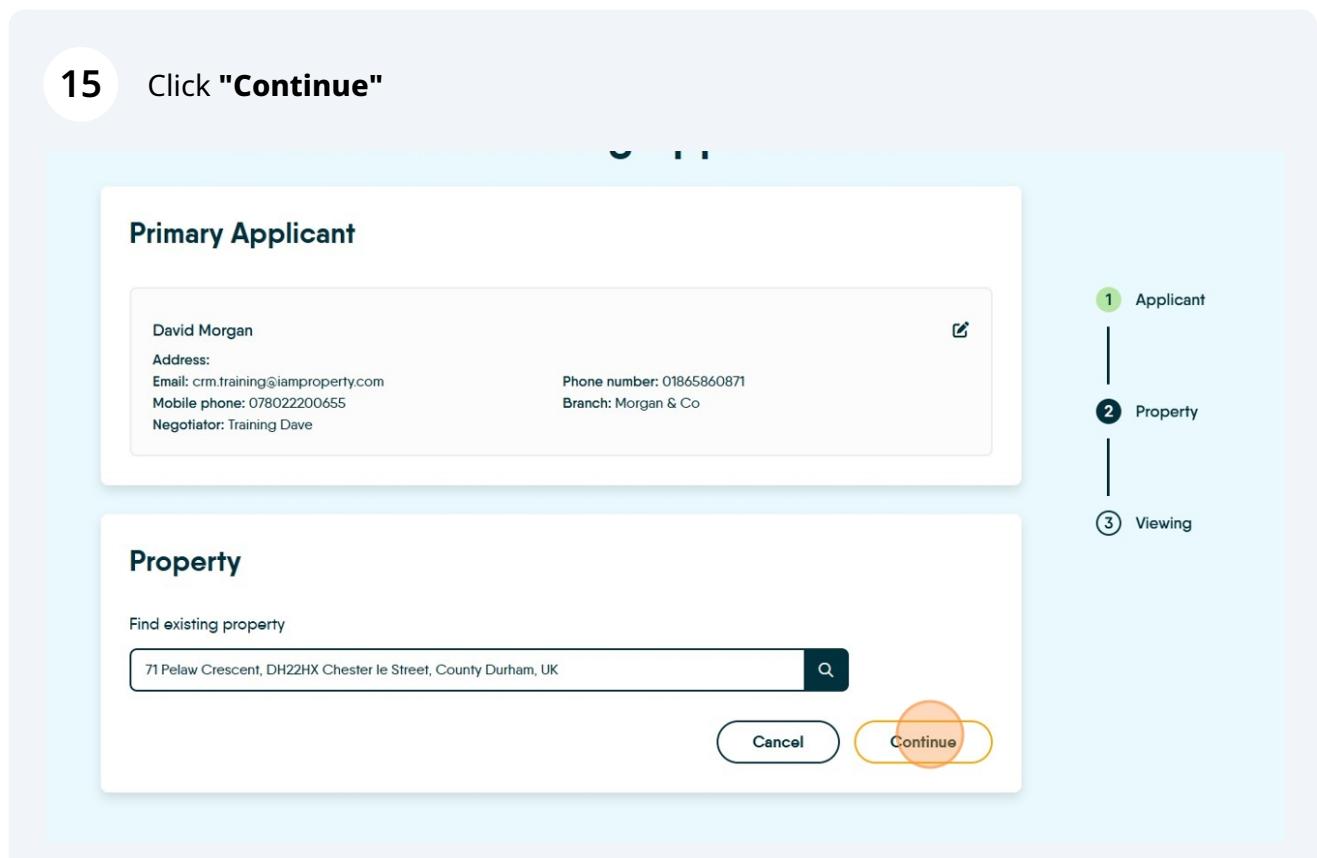
dh22hx

1 Applicant

2 Property

3 Viewing

15 Click "Continue"



Primary Applicant

David Morgan

Address: Email: crm.training@iamproperty.com Phone number: 01865860871
Mobile phone: 078022200655 Branch: Morgan & Co
Negotiator: Training Dave

Property

Find existing property

71 Pelaw Crescent, DH22HX Chester le Street, County Durham, UK

Cancel Continue

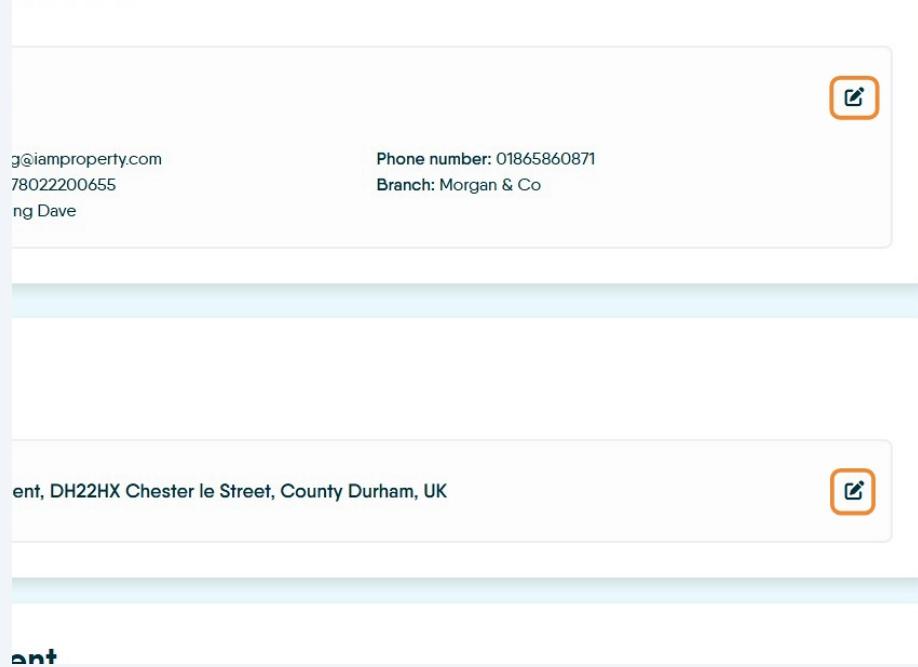
1 Applicant

2 Property

3 Viewing

16 If any of the entries need to be edited, click on the 'pencil' icon (highlighted)

Applicant



g@iamproperty.com
78022200655
ng Dave

Phone number: 01865860871
Branch: Morgan & Co

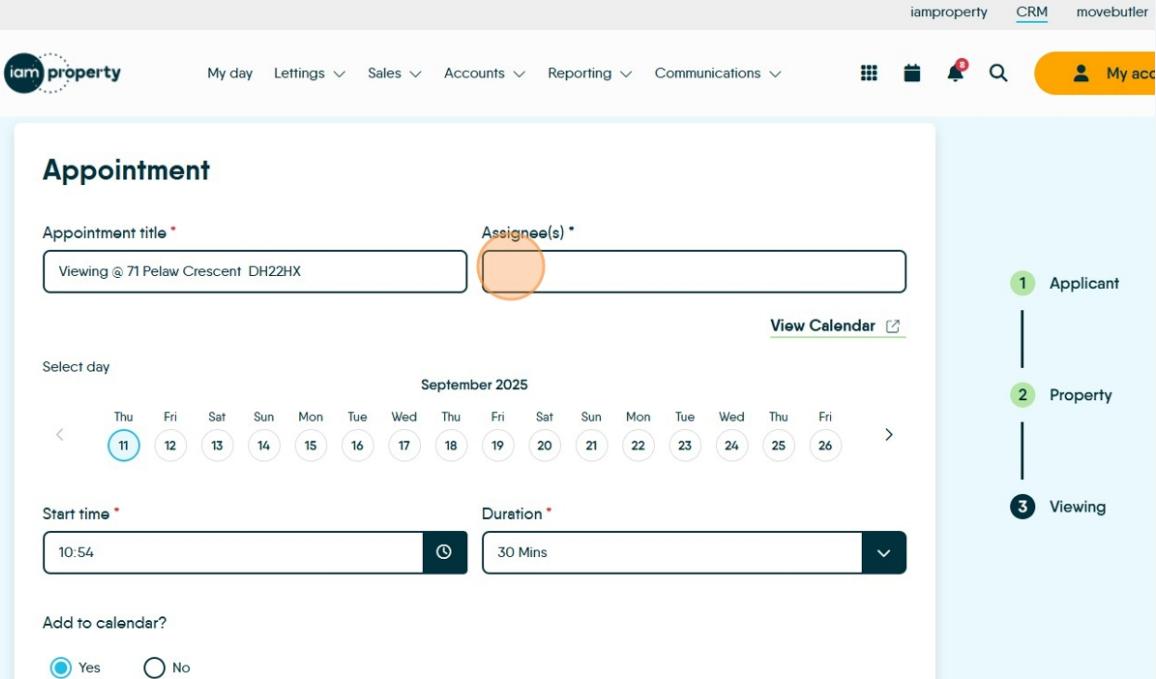
ent, DH22HX Chester le Street, County Durham, UK

1 Applicant

2 Property

3 Viewing

17 Click "Assignee(s)" and assign the viewing to one of your team.



iamproperty CRM movebutler

My day Lettings Sales Accounts Reporting Communications

My account

Appointment

Appointment title * Viewing @ 71 Pelaw Crescent DH22HX

Assignee(s) *

View Calendar

Select day

September 2025

11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26

Start time * 10:54

Duration * 30 Mins

Add to calendar?

Yes No

1 Applicant

2 Property

3 Viewing

Appointment

Appointment title *

Assignee(s) *

Select day
September

Thu Fri Sat Sun Mon Tue Wed Thu

11 12 13 14 15 16 17 18

Start time *
 ↻

Add to calendar?
 Yes No

Confirmed?
 Yes No

- 1 Applicant
- 2 Property
- 3 Viewing

18 Click the date that you wish to create the viewing for.

Appointment

Appointment title *

Assignee(s) *

X

Select day
September 2025

Thu Fri Sat Sun Mon Tue Wed Thu Fri Sat Sun Mon Tue Wed Thu Fri

11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26

Start time *
 ↻

✓ Training Dave has no conflicting appointments

Add to calendar?
 Yes No

Confirmed?
 Yes No

- 1 Applicant
- 2 Property
- 3 Viewing

10

19 Click the "Start time *" field.

Appointment

Appointment title *

Viewing @ 71 Pelaw Crescent DH22HX

Assignee(s) *

Training Dave X

X

[View Calendar](#)

Select day

September 2025

<

Thu

Fri

Sat

Sun

Mon

Tue

Wed

Thu

Fri

Sat

Sun

Mon

Tue

Wed

Thu

Fri

>

Start time *

10:54

Duration *

30 Mins

✓ Training Dave has no conflicting appointments

Add to calendar?

Yes No

Confirmed?

Yes No

- 1 Applicant
- 2 Property
- 3 Viewing

20 Click "Duration" to set the length of the appointment, the default time is 30 mins.

Appointment

Appointment title *

Viewing @ 71 Pelaw Crescent DH22HX

Assignee(s) *

Training Dave X

X

[View Calendar](#)

Select day

September 2025

<

Thu

Fri

Sat

Sun

Mon

Tue

Wed

Thu

Fri

Sat

Sun

Mon

Tue

Wed

Thu

Fri

>

Start time *

11:45

Duration *

30 Mins

✓ Training Dave has no conflicting appointments

Add to calendar?

Yes No

Confirmed?

Yes No

- 1 Applicant
- 2 Property
- 3 Viewing

21

At this point the CRM will check the calendar for any appointment conflicts, if any are found then the detail will show under the start time field, in the highlighted area.

Appointment

Appointment title * Viewing @ 71 Pelaw Crescent DH22HX

Assignee(s) * Training Dave X

View Calendar

Select day

September 2025

Start time * 11:45

Duration * 30 Mins

✓ Training Dave has no conflicting appointments

Add to calendar?

Yes No

Confirmed?

1 Applicant

2 Property

3 Viewing

22

Set if the appointment is to be added to the Calendar. Click "Yes" or "No" if the appointment is not added to the calendar, it will show in the Applicant and Property records ONLY. Otherwise, the appointment will show in all 3 areas (calendar, applicant and property).

Appointment

Appointment title * Viewing @ 71 Pelaw Crescent DH22HX

Assignee(s) * Training Dave X

View Calendar

Select day

September 2025

11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26

Start time *

11:45

Duration *

30 Mins

✓ Training Dave has no conflicting appointments

Add to calendar?

Yes No

Confirmed?

Yes No

1 Applicant

2 Property

3 Viewing

23

If the appointment is "**Confirmed?**" Click "**Yes**" if the appointment is not confirmed it will show in the calendar in red and show in the 'Unconfirmed viewings' option in the Activity List.

Appointment

Appointment title * Viewing @ 71 Pelaw Crescent DH22HX

Assignee(s) * Training Dave

[View Calendar](#)

Select day September 2025

Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri		
<	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	>

Start time * 11:45

Duration * 30 Mins

✓ Training Dave has no conflicting appointments

Add to calendar?

Yes No

Confirmed?

Yes No



24

Note if the appointment is 'Accompanied' and where you are meeting the viewer..

Start time * 11:45

Duration * 30 Mins

✓ Training Dave has no conflicting appointments

Add to calendar?

Yes No

Confirmed?

Yes No

Accompanied? (optional)

No Yes

Meet at (optional)

Estate agents Property

Internal notes (optional)



Start time * Duration *

Training Dave has no conflicting appointments

Add to calendar?

Yes No

Confirmed?

Yes No

Accompanied? (optional)

No Yes

Meet at (optional)

Estate agents Property

Internal notes (optional)



Cancel
Create appointment

25 Click this field to add any notes about the viewing.

Start time * Duration *

Training Dave has no conflicting appointments

Add to calendar?

Yes No

Confirmed?

Yes No

Accompanied? (optional)

No Yes

Meet at (optional)

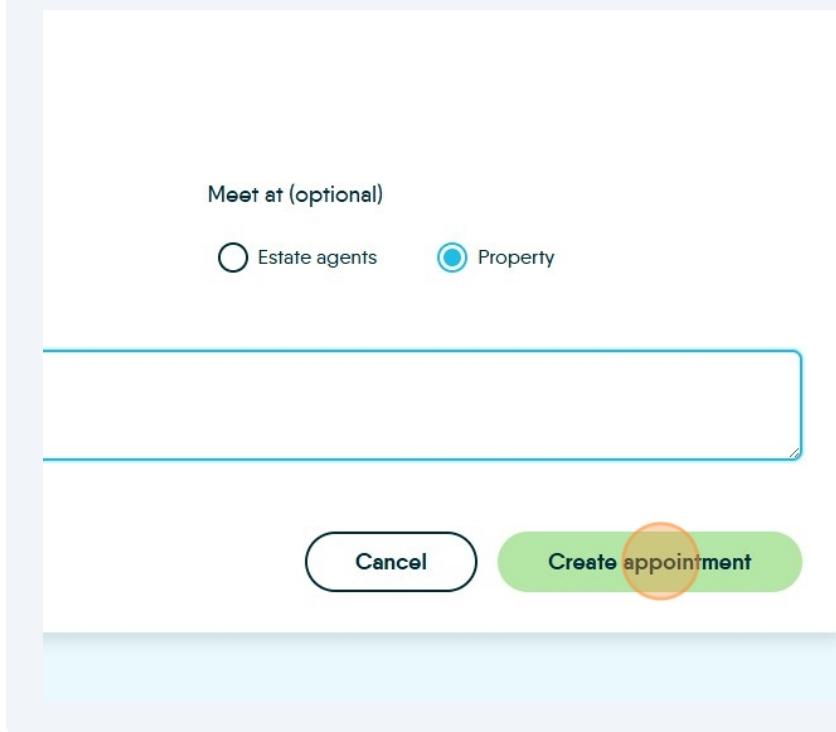
Estate agents Property

Internal notes (optional)



Cancel
Create appointment

26 Click "Create appointment"



2 Property

3 Viewing