

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>

iam property

My day Lettings Sales Accounts Reporting Communications

My account

Welcome back, Training

+ Add New Record View property management Visit help centre

Search all records

Today's events

Time	Name
12:00	Test test
13:03	Appraisal: 7153 Pelaw Crescent, Chester le Street

My tasks

Status	Name	Priority	Start date	Due date
Not Started	test	High	19/Jun/2025	19/Jun/2025
Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025
Not Started	Onboarding	High	03/Sept/2025	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 iamproperty CRM dashboard. The top navigation bar includes links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is present on the right. The main heading is 'Welcome back, Training'. Below this, there is a 'Quick Access' section with three buttons: 'Add New Record' (highlighted with an orange circle), 'View property management', and 'Visit help centre'. Below the quick access buttons is a search bar labeled 'Search all records'. At the bottom, there are two panels: 'Today's events' and 'My tasks'.

Today's events

Time	Name
12:00	Test test
13:03	Appraisal: 7153 Pelaw Crescent, Chester le Street

My tasks

Status	Name	Priority	Start date	Due date
Not Started	test	High	19/Jun/2025	19/Jun/2025
Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025
Not Started	Onboarding	High	03/Sept/2025	03/Sept/2025

4 From the 'Quick Access' menu

5 Click here

The screenshot shows the IAM Property CRM dashboard. At the top, there's a navigation bar with links for 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below this is a secondary navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar is present with a magnifying glass icon. A 'My account' button is on the right. The main heading is 'Welcome back, Training'. Below it, there's a 'Add New Record' button and links for 'View property management' and 'Visit help centre'. A search bar for 'Records' is shown with a magnifying glass icon. Below the search bar, there are two sections: 'My events' and 'My tasks'.

My events

Name
Test test
Appraisal: 7153 Pelaw Crescent, Chester le Street

My tasks

Status	Name	Priority	Start date	Due date
Not Started	test	High	19/Jun/2025	19/Jun/2025
Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025
Not Started	Onboarding	High	03/Sept/2025	03/Sept/2025

6 Click "Add new record"

The screenshot shows the IAM Property CRM dashboard with the 'Add new record' button highlighted in the sidebar. The sidebar is open, showing a list of options: 'Active branches', 'Calendar', 'Add new record', 'Calls', 'Contacts', 'Events', 'Notes', and 'Tasks'. The 'Add new record' button is circled in orange. The main heading is 'Welcome back, Training'. Below it, there's a 'Add New Record' button and links for 'View property management' and 'Visit help centre'. A search bar for 'Records' is shown with a magnifying glass icon. Below the search bar, there are two sections: 'My events' and 'My tasks'.

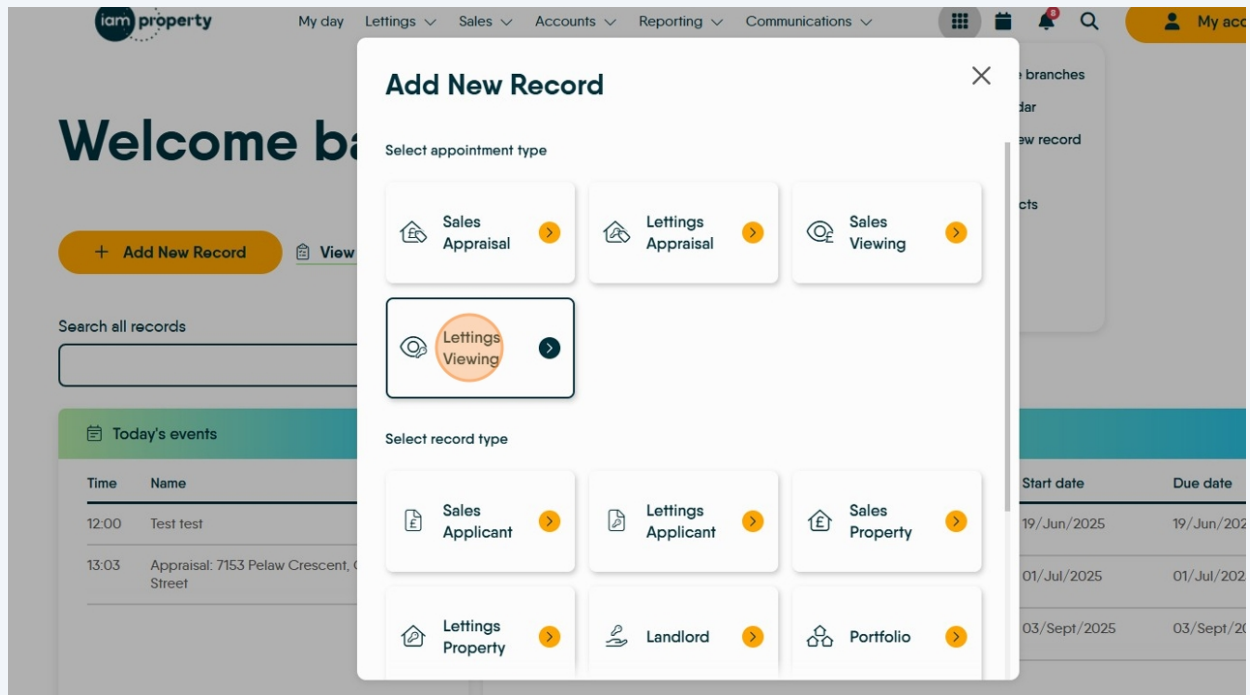
My events

Name
Test test
Appraisal: 7153 Pelaw Crescent, Chester le Street

My tasks

Status	Name	Priority	Start date	Due date
Not Started	test	High	19/Jun/2025	19/Jun/2025
Not Started	goodfellows task	High	01/Jul/2025	01/Jul/2025
Not Started	Onboarding	High	03/Sept/2025	03/Sept/2025

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

1 Applicant

2 Property

3 Viewing

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

Use existing record

Surname *

Mobile phone

Work phone

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 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)

Primary Applicant Use existing record

Title Forename * Surname *

Email * Mobile phone

Phone number Work phone

Branch * Negotiator *

Morgan & Co Training Dave

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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

Email Mobile phone

Phone number Work phone

Branch Negotiator

Applicant's address (optional)

Search by postcode

12

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

Title Forename Surname

Email Mobile phone

Phone number Work phone

Branch Negotiator

Applicant's address (optional)

Search by postcode

Or enter address manually

- 1 Applicant
- 2 Property
- 3 Viewing

13 Click "Continue"

Form fields for Step 13:

- Title: Mr (dropdown)
- Forename: David
- Surname: Morgan
- Email: crm.training@iamproperty.com
- Mobile phone: 078022200655
- Home number: 01865860871
- Work phone: (empty)
- Branch: Morgan & Co (dropdown)
- Negotiator: Training Dave (dropdown)
- Applicant's address (optional): Enter a full postcode (input field)
- Search button (magnifying glass icon)
- Buttons: Cancel, Continue (highlighted with an orange circle)

- 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

Form fields for Step 14:

Primary Applicant

David Morgan

Address: (empty)

Email: crm.training@iamproperty.com

Mobile phone: 078022200655

Negotiator: Training Dave

Phone number: 01865860871

Branch: Morgan & Co

Property

Find existing property

Search for a property (input field)

Search button (magnifying glass icon)

Buttons: Cancel, Continue (highlighted with an orange circle)

- 1 Applicant
- 2 Property
- 3 Viewing

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

Mobile phone: 078022200655

Negotiator: Training Dave

Phone number: 01865860871

Branch: Morgan & Co

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

ent

- 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

iamproperty

Appointment

Appointment title *
Viewing @ 71 Pelaw Crescent DH22HX

Assignee(s) *

View Calendar

Select day

September 2025

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

Start time *
10:54

Duration *
30 Mins

Add to calendar?
☒ Yes ☐ No

- 1 Applicant
- 2 Property
- 3 Viewing

Appointment

Appointment title *

Viewing @ 71 Pelaw Crescent DH22HX

Assignee(s) *

|

VTUK USER

Ian Henry

David-George Morgan

Training Dave

Christian Bale

Natalie Portman

Select day

September

Thu 11 Fri 12 Sat 13 Sun 14 Mon 15 Tue 16 Wed 17 Thu 18

Start time *

10:54

30 Mins

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 *

Viewing @ 71 Pelaw Crescent DH22HX

Assignee(s) *

Training Dave X

[View Calendar](#)

Select day

September 2025

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

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

19 Click the **"Start time *"** field.

Appointment

Appointment title *

Assignee(s) *

[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 *

Duration *

✓ 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 *

Assignee(s) *

[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 *

Duration *

✓ 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 *

Assignee(s) *

[View Calendar](#)

Select day

September 2025

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

Start time *

Duration *

✓ Training Dave has no conflicting appointments

Add to calendar?

☒ Yes ☐ No

Confirmed?

☒ Yes ☐ No

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 *

Assignee(s) *

[View Calendar](#)

Select day

September 2025

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

Start time *

Duration *

✓ 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 *
Assignee(s) *

Viewing @ 71 Pelaw Crescent DH22HX
Training Dave X

View Calendar

Select day

September 2025

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

Start time *
Duration *

11:45
30 Mins

✓ Training Dave has no conflicting appointments

Add to calendar?

☒ Yes
☐ No

Confirmed?

☒ Yes
☐ No

1 Applicant
2 Property
3 Viewing

24

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

Start time *
Duration *

11:45
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)

Cancel
Create appointment

1 Applicant
2 Property
3 Viewing

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)

Cancel Create appointment

1 Applicant

2 Property

3 Viewing

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

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)

Cancel Create appointment

1 Applicant

2 Property

3 Viewing

26 Click **"Create appointment"**

Meet at (optional)

☐ Estate agents ☒ Property

2 Property

3 Viewing