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.
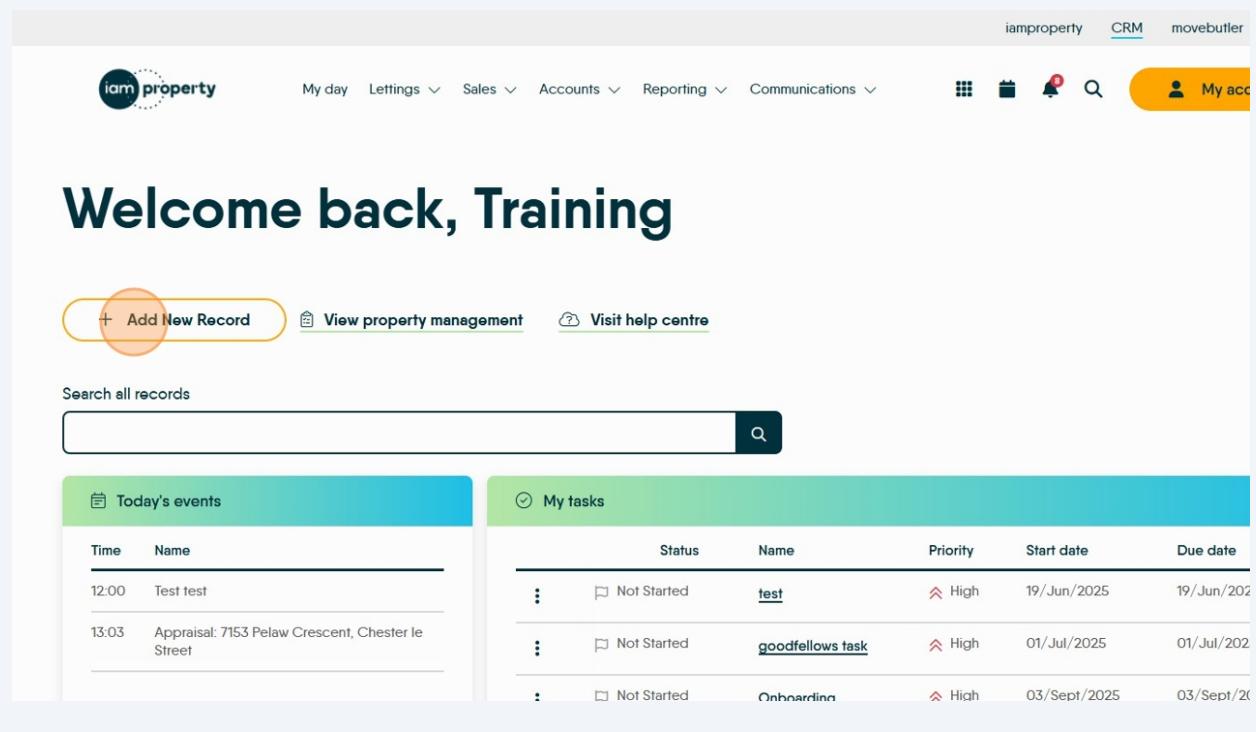
1 Navigate to https://crm.iamproperty.com/MyDay

ⓘ 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.

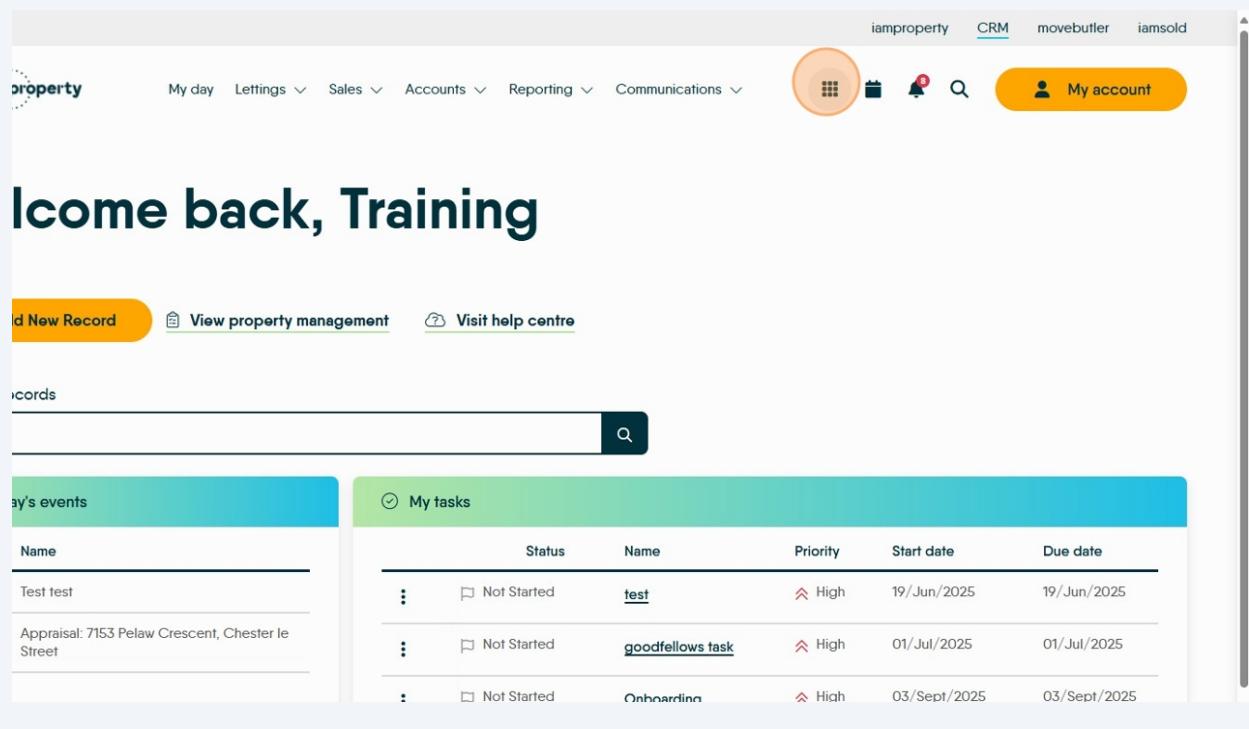**2** **From the My Day screen**

3   Click **"Add New Record"**

4   **From the 'Quick Access' menu**

5 Click here

6 Click **"Add new record"**

7   Click **"Lettings Viewing"**
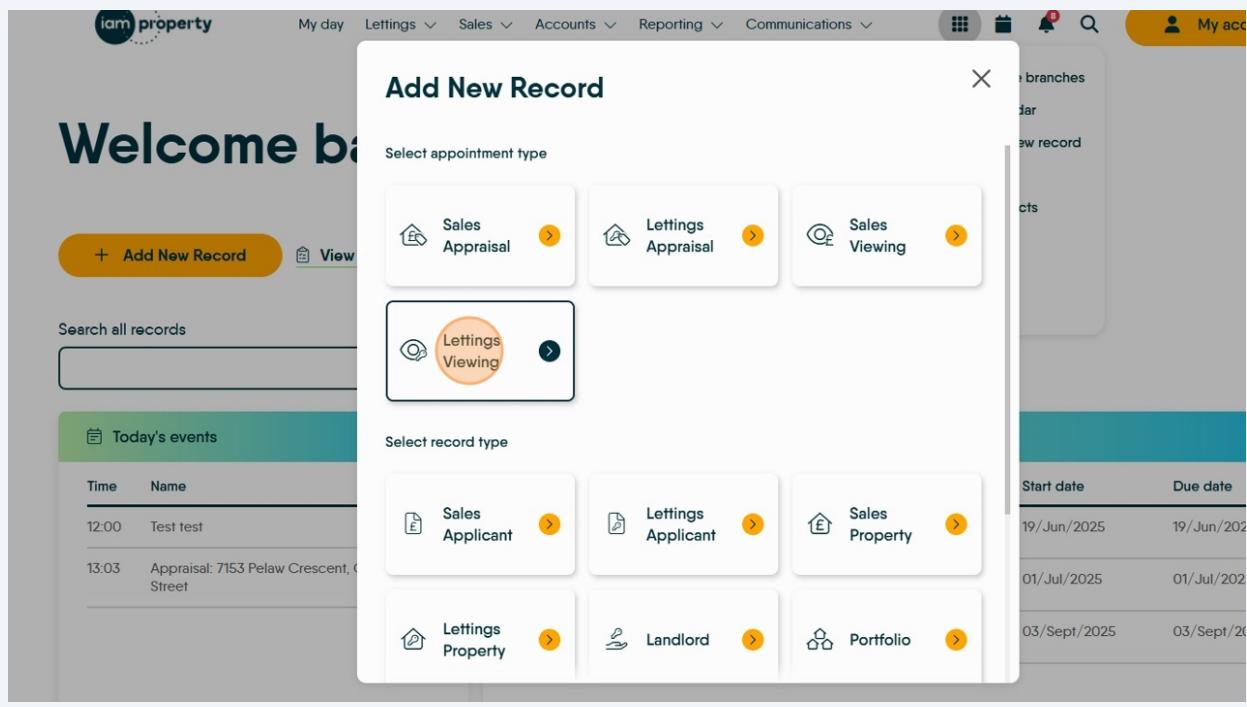
8   You will arrive at this screen.

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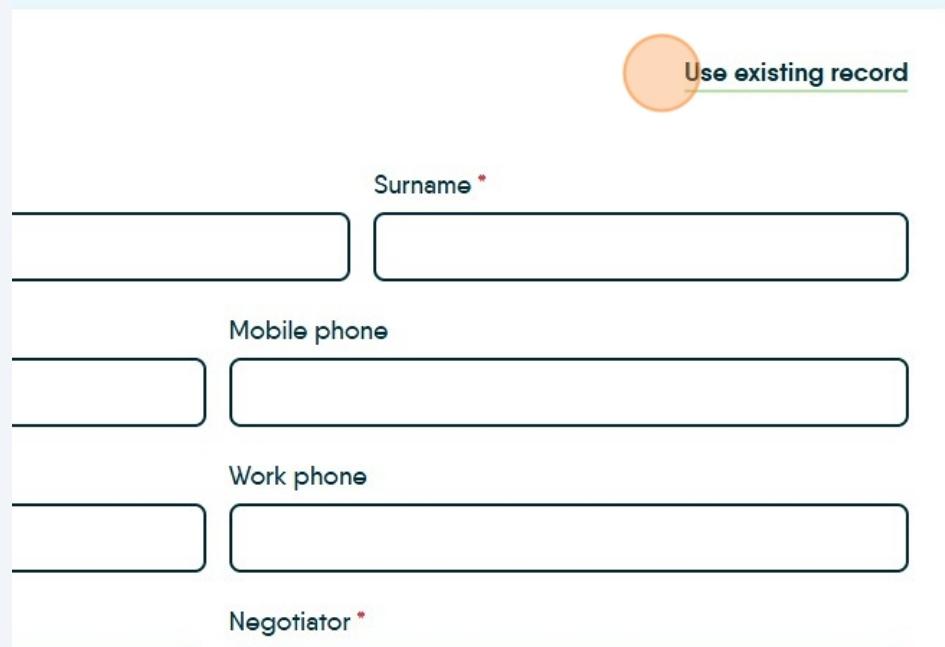
Use existing record

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
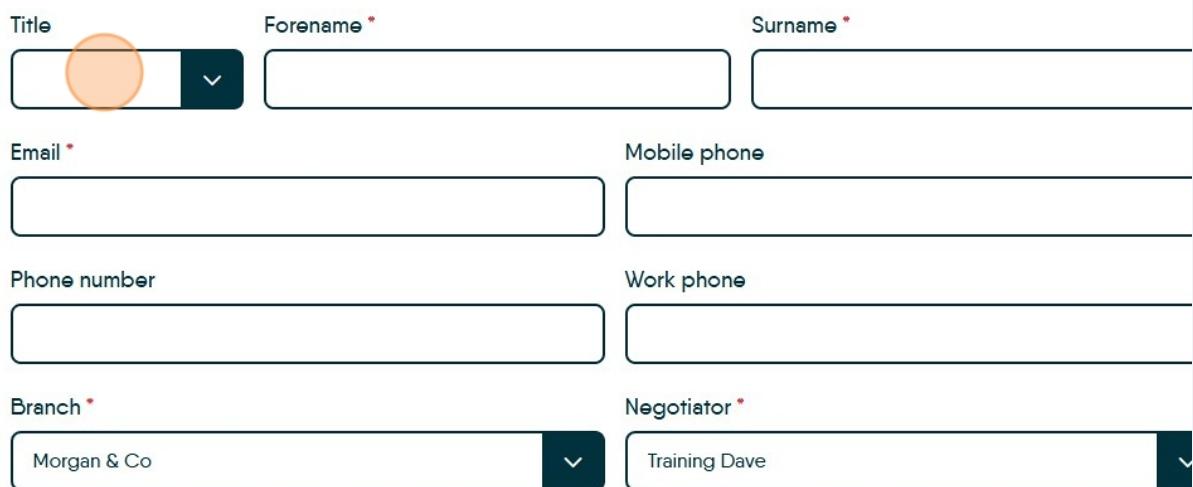
Use existing reco

Title

Forename *

Surname *

Email *

Mobile phone

Phone number

Work phone

Branch *

Morgan & Co

Negotiator *

Training Dave

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
Mr

Forename *
David

Surname *
Morgan

Email *
crm.training@iamproperty.com

Mobile phone
078022200655

Phone number
01865860871

Work phone

Branch *
Morgan & Co

Negotiator *
Training Dave

Applicant's address (optional)

Search by postcode

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

Title
Mr

Forename *
David

Surname *
Morgan

Email *
crm.training@iamproperty.com

Mobile phone
078022200655

Phone number
01865860871

Work phone

Branch *
Morgan & Co

Negotiator *
Training Dave

Applicant's address (optional)

Search by postcode

Enter a full postcode

Or enter address manually

Cancel   Continue

① Applicant

② Property

③ Viewing

13   Click **"Continue"**

Title	Forename *	Surname *
Mr	David	Morgan

Email *
crm.training@iamproperty.com

Mobile phone
078022200655

Phone number
01865860871

Work phone

Branch *
Morgan & Co

Negotiator *
Training Dave

Applicant's address (optional)

Enter a full postcode

Enter a full postcode 🔍

Or enter address manually

Cancel   Continue

1 ● Applicant

2 ○ Property

3 ○ Viewing

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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

Phone number: 01865860871
Branch: Morgan & Co

1 ● Applicant

2 ● Property

3 ○ Viewing

Property

Find existing property

Search for a property 🔍

Cancel   Continue

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

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15 Click **"Continue"**
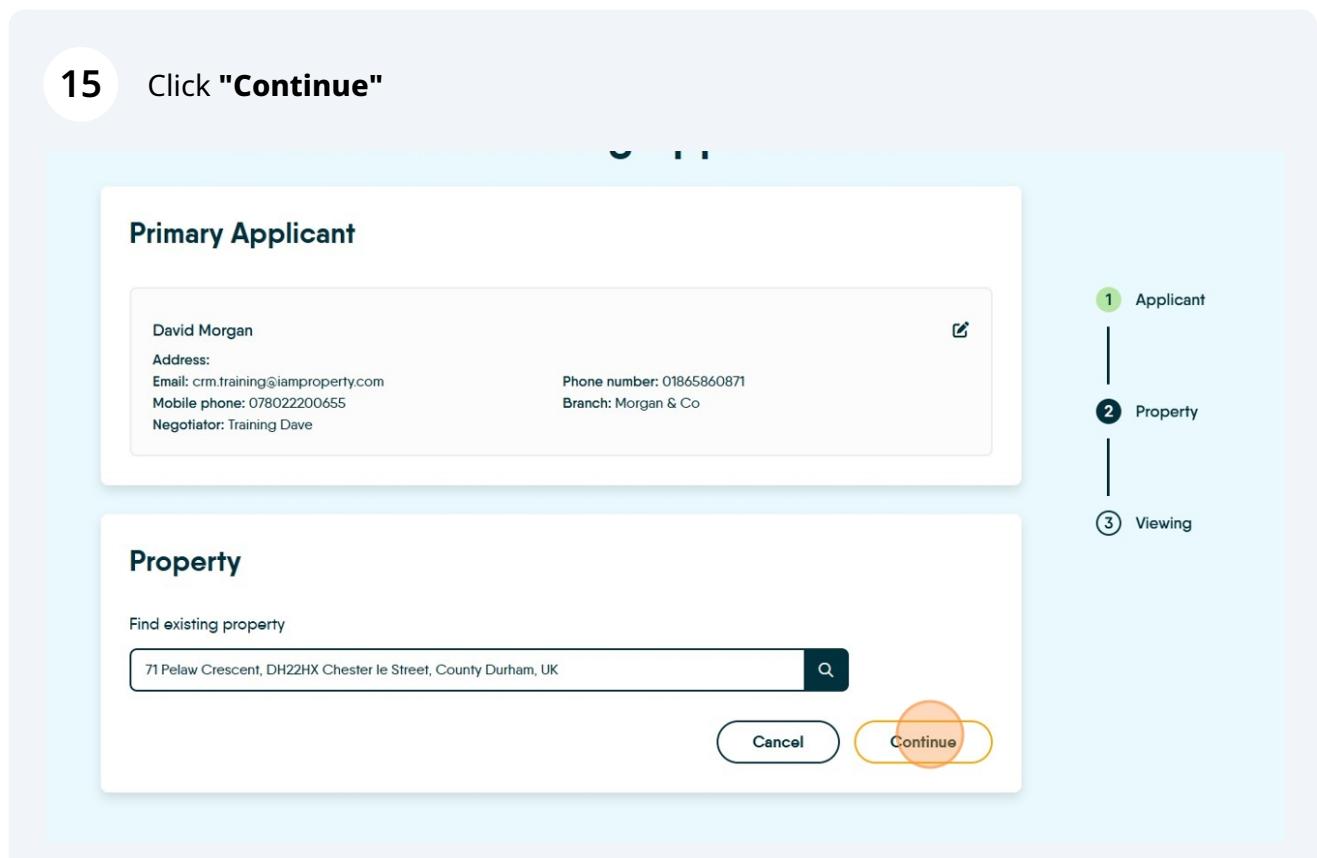
Primary Applicant

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)
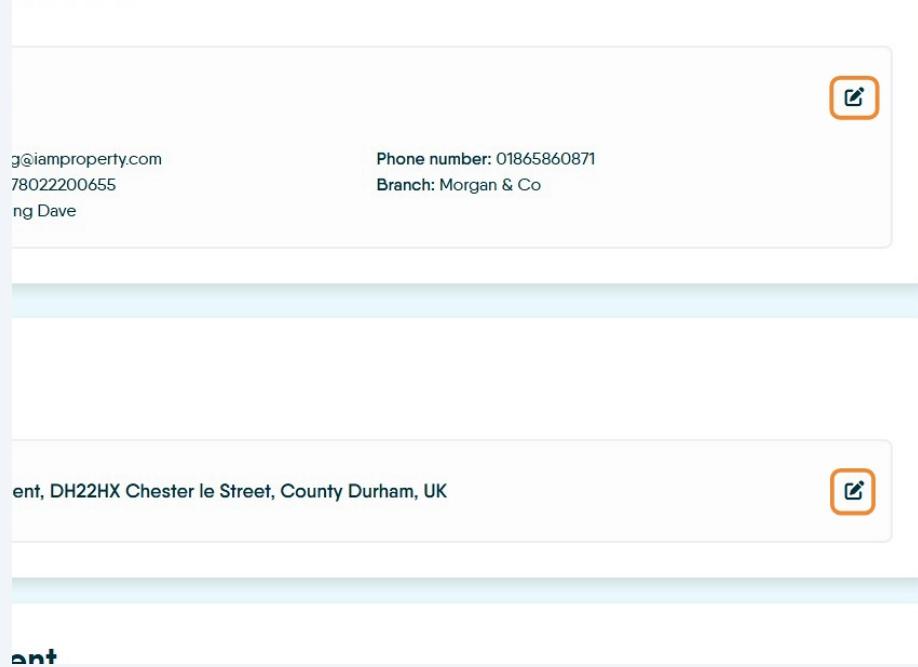
oplicant

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

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17 Click "Assignee(s)" and assign the viewing to one of your team.
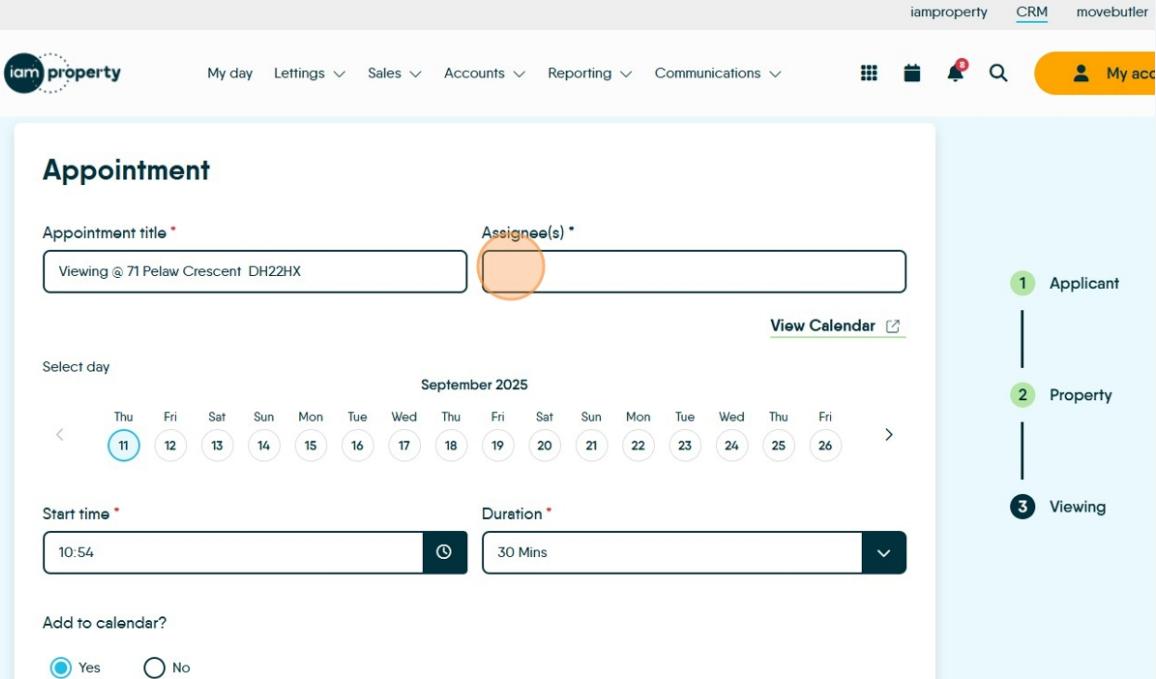
iam property   My day   Lettings ∨   Sales ∨   Accounts ∨   Reporting ∨   Communications ∨   ▦ 📅 🔔 Q   👤 My acc

Appointment

Appointment title *

Viewing @ 71 Pelaw Crescent DH22HX

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 *

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

Septembe

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

‹

Start time *

10:54 🕐

30 Mins ⌄

Add to calendar?

◉ Yes   ○ No

Confirmed?

◉ Yes   ○ No

① Applicant

② Property

③ Viewing

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

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 *

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 *

| 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 *

| 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

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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 ✕ | ✕ |

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

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.

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).

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 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 *

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

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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)

[   ]

(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

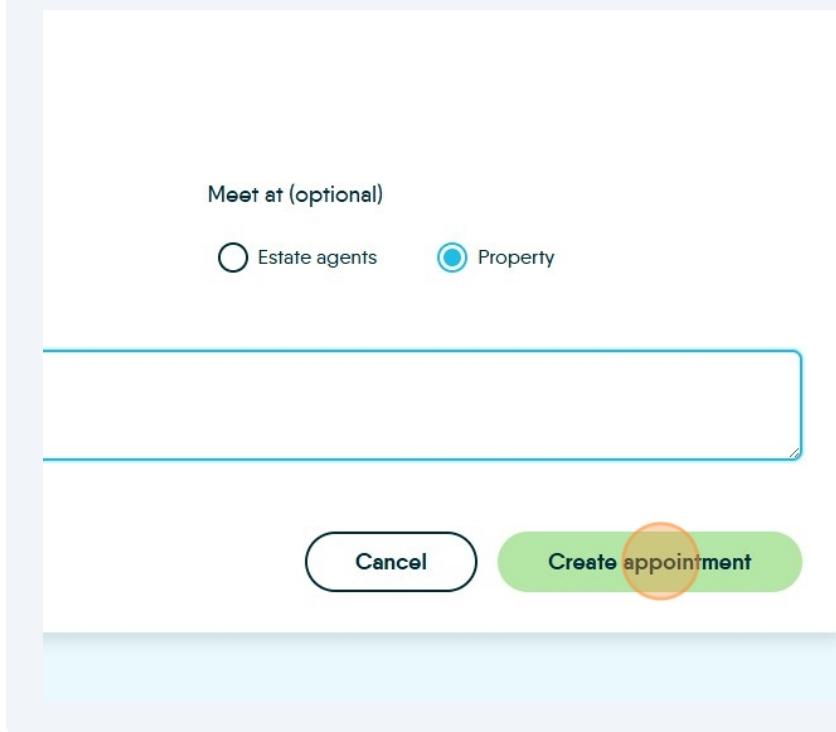Accompanied? (optional)

◯ No   ⦿ Yes

Meet at (optional)

◯ Estate agents   ⦿ Property

Internal notes (optional)

Cancel   Create appointment

① Applicant

② Property

③ Viewing

14

26 Click **"Create appointment"**

Meet at (optional)

◯ Estate agents   ⊙ Property

Cancel   Create appointment

② Property

③ Viewing