

Core Process Simplification - Adding a New Sales 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>

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

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. At the top right, there are links for 'iamproperty', 'CRM', and 'movebutler'. The main navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar and a user profile icon labeled 'My acc' are also present. The main heading reads 'Welcome back, Training'. Below this, there is a 'Quick Access' menu with three items: 'Add New Record' (highlighted with a yellow circle), 'View property management', and 'Visit help centre'. A search bar for records is located below the menu. The dashboard is divided into two main sections: '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 CRM dashboard with the 'Add New Record' button highlighted in orange. The dashboard includes a navigation menu, a search bar, and two main sections: 'My events' and 'My tasks'.

Navigation Menu: iamproperty CRM movebutler iamsold

Dashboard Header: My day Lettings Sales Accounts Reporting Communications My account

I come back, Training

Buttons: Add New Record View property management Visit help centre

Records: [Search bar]

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 CRM dashboard with the 'Add new record' option in the dropdown menu highlighted in orange. The dashboard includes a navigation menu, a search bar, and two main sections: 'My events' and 'My tasks'.

Navigation Menu: iamproperty CRM movebutler iamsold

Dashboard Header: My day Lettings Sales Accounts Reporting Communications My account

I come back, Training

Buttons: Add New Record View property management Visit help centre

Records: [Search bar]

My events:

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

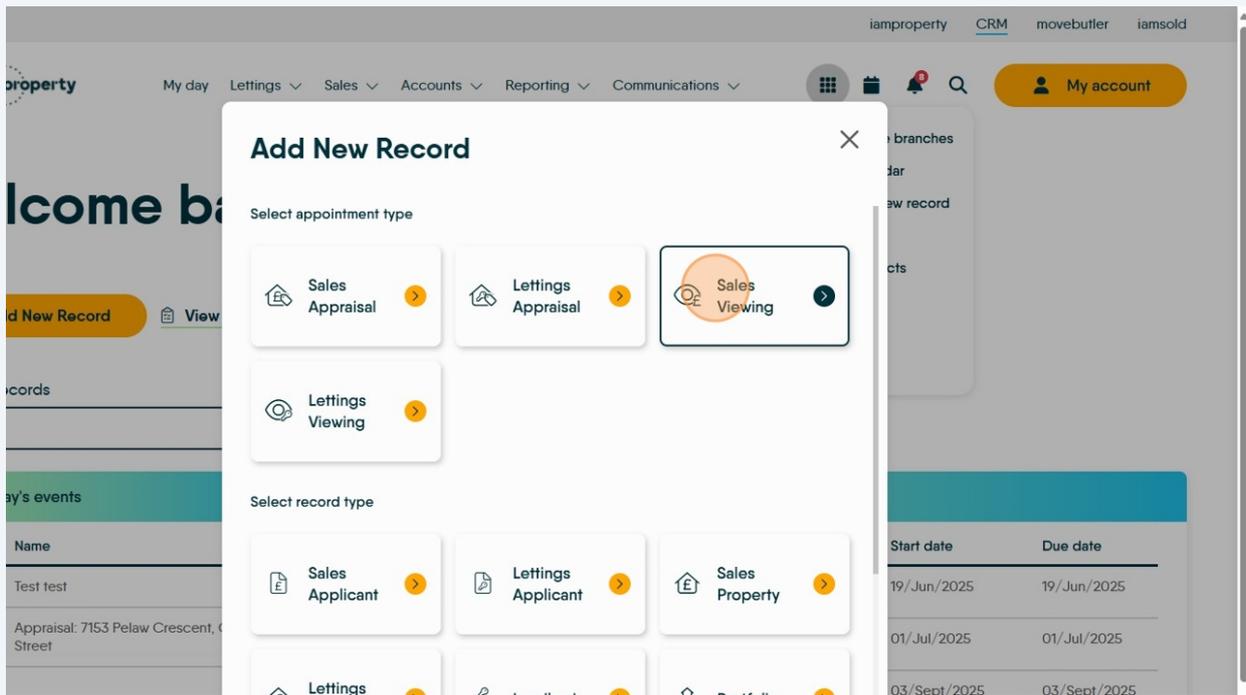
My tasks:

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

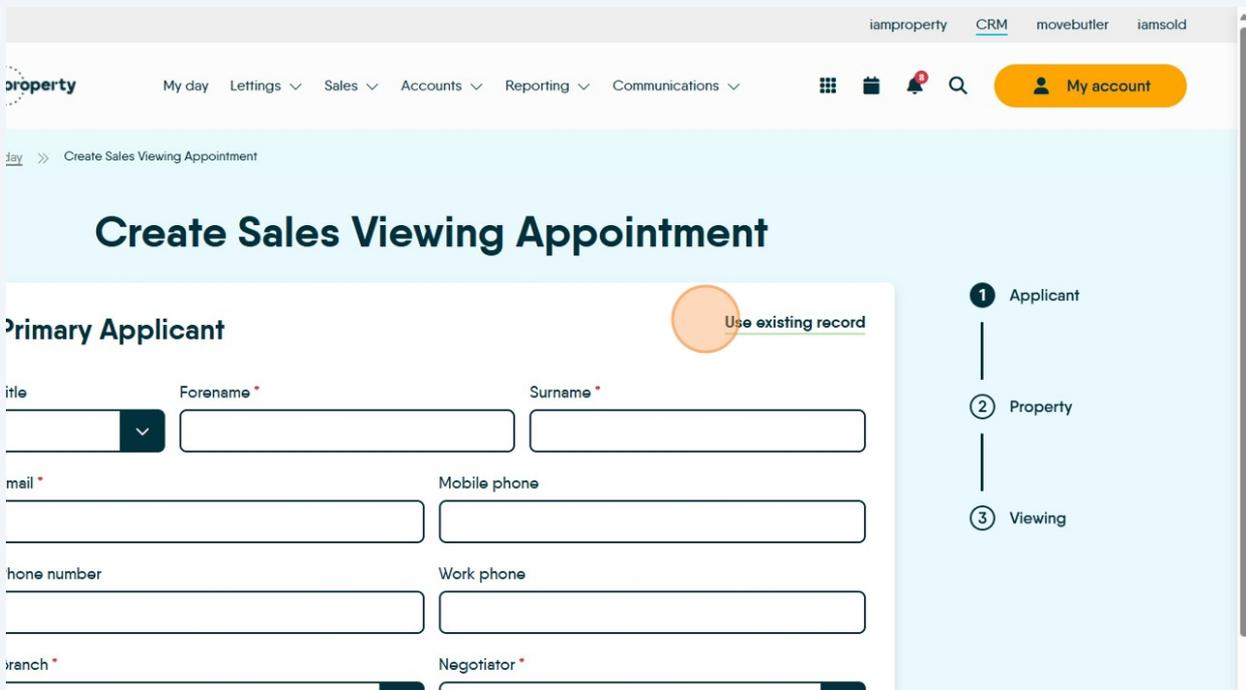
Dropdown Menu:

- Active branches
- Calendar
- Add new record**
- Calls
- Contacts
- Events
- Notes
- Tasks

7 Click "Sales Viewing"



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



9 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__1kZYdDZSyG1EqgrSnM06g?referrer=search)

iam property My day Lettings Sales Accounts Reporting Communications My acc

< Back to my day >> Create Sales Viewing Appointment

Create Sales Viewing Appointment

Primary Applicant [Use existing record](#)

Title Forename* Surname*

Email* Mobile phone

Phone number Work phone

Branch* Negotiator*

Applicant's address (optional)

- 1 Applicant
- 2 Property
- 3 Viewing

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

iam property My day Lettings Sales Accounts Reporting Communications My account

Back to my day >> Create Sales Viewing Appointment

Create Sales Viewing Appointment

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)

- 1 Applicant
- 2 Property
- 3 Viewing

11 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

Cancel Continue

- 1 Applicant
- 2 Property
- 3 Viewing

12 Click "Continue"

Title **Forename** **Surname**

Mr David Morgan

mail **Mobile phone**

crm.training@iamproperty.com 078022200655

hone 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

Cancel Continue

- 1 Applicant
- 2 Property
- 3 Viewing

13

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

The screenshot displays the 'Create sales viewing appointment' form. It is divided into two main sections: 'Primary Applicant' and 'Property'. The 'Primary Applicant' section contains the following information:

- Name: David Morgan
- Address: (empty)
- Email: crm.training@iamproperty.com
- Mobile phone: 078022200655
- Negotiator: Training Dave
- Phone number: 01865860871
- Branch: Morgan & Co

The 'Property' section features a search field labeled 'Find existing property' with the placeholder text 'Search for a property'. An orange circle highlights this search field. Below the search field are 'Cancel' and 'Continue' buttons. A dropdown menu is open below the search field, displaying a list of addresses:

- 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

The search field contains the text 'dh22hx'. To the right of the form is a vertical progress indicator with three steps: 1 Applicant, 2 Property, and 3 Viewing. The 'Property' step is currently active.

14 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 

1 Applicant

2 Property

3 Viewing

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

Applicant



g@iamproperty.com Phone number: 01865860871
78022200655 Branch: Morgan & Co
ng Dave

Property

ent, DH22HX Chester le Street, County Durham, UK 

1 Applicant

2 Property

3 Viewing

16

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

The screenshot shows the 'Appointment' form in the iamproperty CRM. The 'Appointment title' field contains 'Viewing @ 71 Pelaw Crescent DH22HX'. The 'Assignee(s)' field is empty and highlighted with an orange circle. Below the title field is a 'View Calendar' link. The 'Select day' section shows a calendar for September 2025 with the 11th selected. The 'Start time' is set to 10:54 and the 'Duration' is 30 Mins. There are radio buttons for 'Add to calendar?' (Yes/No).

- 1 Applicant
- 2 Property
- 3 Viewing

The screenshot shows the 'Appointment' form with the 'Assignee(s)' dropdown menu open. The dropdown list includes: VTUK USER, Ian Henry, David-George Morgan, Training Dave (highlighted with an orange circle), Christian Bale, and Natalie Portman. The 'Appointment title' field contains 'Viewing @ 71 Pelaw Crescent DH22HX'. The 'Start time' is 10:54 and the 'Duration' is 30 Mins. There are radio buttons for 'Add to calendar?' (Yes/No) and 'Confirmed?' (Yes/No).

- 1 Applicant
- 2 Property
- 3 Viewing

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

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

18 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

19 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 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

20 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.

iam property My day Lettings Sales Accounts Reporting Communications My account

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?

- 1 Applicant
- 2 Property
- 3 Viewing

21

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

22

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) *

[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

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

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

Start time * 11:45 [clock icon]

Duration * 30 Mins [dropdown arrow]

✓ 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)

[Text input field with orange circle highlight]

Cancel Create appointment

- 1 Applicant
- 2 Property
- 3 Viewing

25 Click "Create appointment"

Meet at (optional)

Estate agents Property

[Text input field]

Cancel Create appointment

- 2 Property
- 3 Viewing