


# Adding an Appointment to Your CRM Calendar




This guide provides a straightforward, step-by-step process for adding appointments to your CRM calendar, ensuring you can efficiently manage your schedule.

By following these instructions, you can easily set up client calls and other events, enhancing your productivity and organisation. Whether you're new to the CRM or just need a refresher, this guide simplifies the appointment-setting process, making it accessible for everyone.








This is not how we advise to add Viewings, Appraisals etc. There are separate options for that.

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



My day   Lettings ▾   Sales ▾   Accounts ▾   Reporting ▾   Communications ▾



 My account

+ Add

⚙

Calendars

Calendars


Event Type

Types

by branch

Branches

Calendar Integrations




Outlook Calendar

Sync


Google Calendar

Sync


Search Users




Training Dave




Brooke Morgan



David-George Morgan



Today      Fri 31 Oct 2025

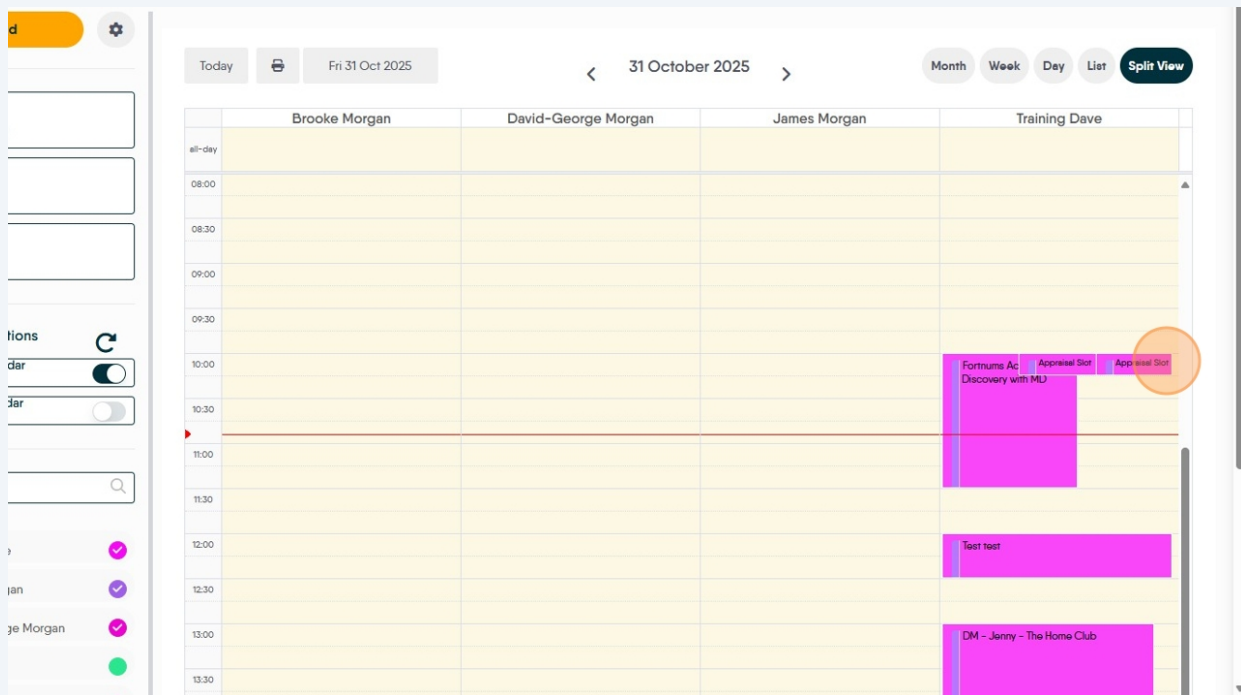
<   31 October 2025   >

Month   Week   Day   List   Split View

	Brooke Morgan	David-George Morgan	James Morgan	Training Dave
all-day				
08:00				
08:30				
09:00				
09:30				
10:00				Formative Assessment Discovery with MJ
10:30				Appraisal Slot
11:00				Appraisal Slot
11:30				
12:00				Test test
12:30				

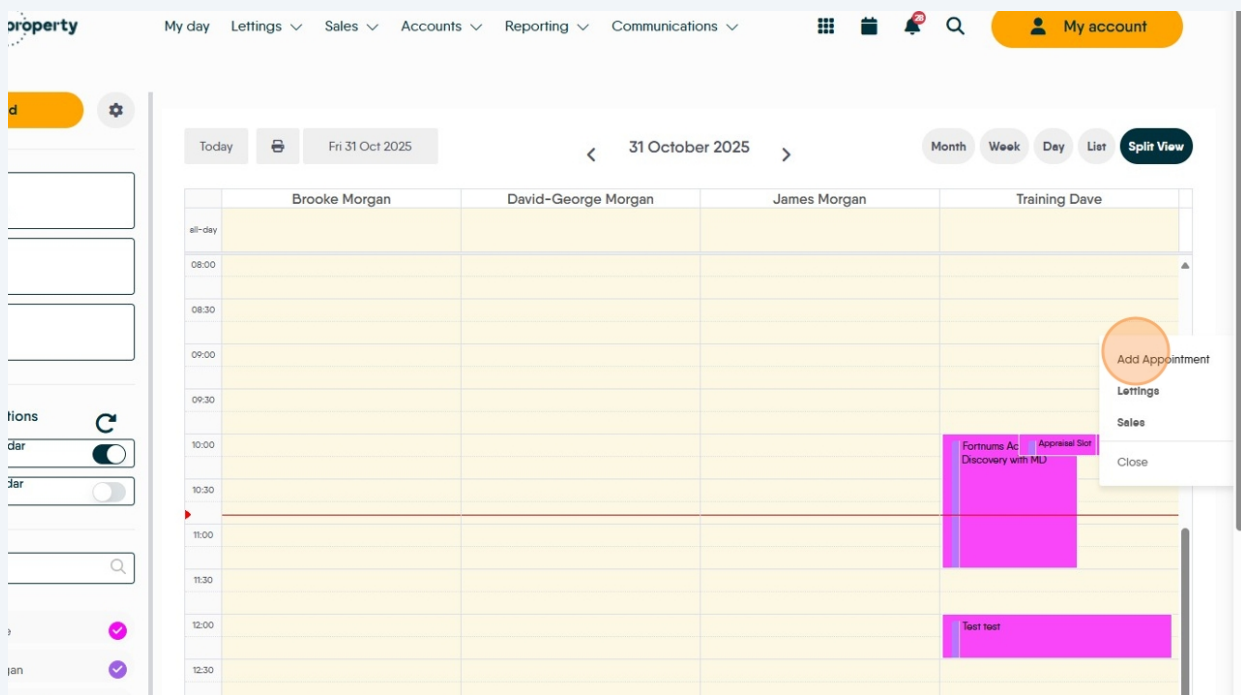
1

## 2 Right-click where you want to add the appointment.



## 3 Click "Add Appointment"

If you want to add viewings, appraisals etc. click the lettings or sales options.



4

Click "**Event Title**" and add the title. If it is an "**All Day**" appointment then click that.

The screenshot shows the 'Add New Appointment' modal form. The 'Event title' field is highlighted with an orange circle, and the 'All day?' toggle is highlighted with an orange rectangle. The form includes fields for Location, Start Time, End Time, Select Branch, Calendar, Assign to users, and Additional Notes. The 'All day?' toggle is currently off.

**Add New Appointment**

My Event Details      Reminder / Recurrence

Event title \*      All day? ☐

Location  
Add location

Start Time \*      End Time \*  
Fri 31 Oct 2025 10:00      Fri 31 Oct 2025 10:30

Select Branch \*  
Morgan & Co

Calendar ⓘ

Assign to users ⓘ  
Training Dave X

Additional Notes

Cancel      Add to Calendar

5

Click the "**Add location**" field add a location if required. This field will assist you by searching for locations based on the text you type.

The screenshot shows the 'Add New Appointment' modal form. The 'Location' field is highlighted with an orange circle. The 'Event title' field now contains 'Client Call'. The 'All day?' toggle is still off. The form includes fields for Location, Start Time, End Time, Select Branch, Calendar, Assign to users, and Additional Notes. The 'All day?' toggle is currently off.

**Add New Appointment**

My Event Details      Reminder / Recurrence

Event title \*      All day? ☐

Location  
Add location

Start Time \*      End Time \*  
Fri 31 Oct 2025 10:00      Fri 31 Oct 2025 10:30

Select Branch \*  
Morgan & Co

Calendar ⓘ

Assign to users ⓘ  
Training Dave X

Additional Notes

Cancel      Add to Calendar

6

Click "**Calendar**" and select the calendar you want to add the appointment to.  
e.g. Click "Lettings"

The screenshot shows the 'My Event Details' form with the following fields and values:

- Event title:** Client Call
- All day?:** Toggle switch is off.
- Location:** Teams
- Start Time:** Fri 31 Oct 2025 10:00
- End Time:** Fri 31 Oct 2025 10:30
- Select Branch:** Morgan & Co
- Calendar:** This field is highlighted with an orange circle.
- Assign to users:** Training Dave (with a close icon)
- Additional Notes:** Empty text area.

At the bottom of the form are two buttons: 'Cancel' and 'Add to Calendar'.

This screenshot shows the 'My Event Details' form with the 'Calendar' dropdown menu open. The menu lists three options: 'Sales', 'Lettings', and 'Annual Leave'. The 'Lettings' option is highlighted with an orange circle.

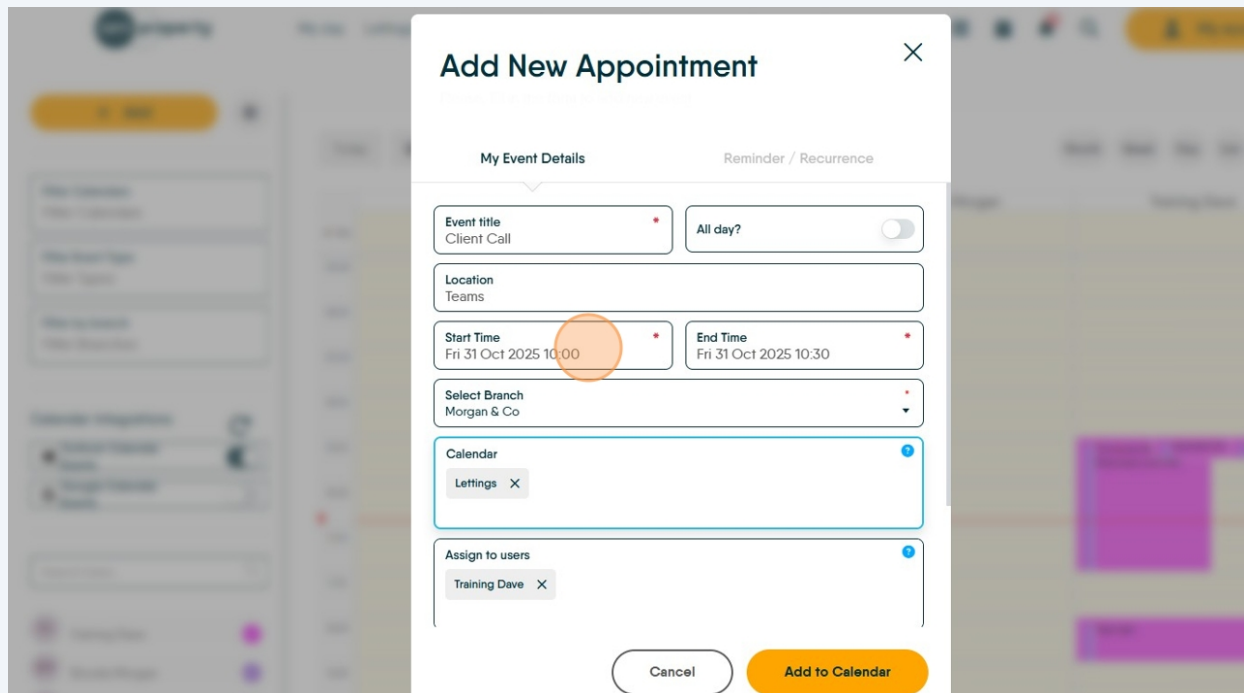
The other fields in the form remain the same as in the previous screenshot:

- Event title:** Client Call
- All day?:** Toggle switch is off.
- Location:** Teams
- Start Time:** Fri 31 Oct 2025 10:00
- End Time:** Fri 31 Oct 2025 10:30
- Select Branch:** Morgan & Co
- Assign to users:** Training Dave (with a close icon)
- Additional Notes:** Empty text area.

The 'Cancel' and 'Add to Calendar' buttons are still visible at the bottom.

7

Click the **"Start Time"** field and set the start time. The date can also be edited here.



The screenshot shows the 'Add New Appointment' form. The 'Start Time' field is highlighted with an orange circle. The form includes fields for Event title, Location, Start Time, End Time, Select Branch, Calendar, and Assign to users. The 'Add to Calendar' button is highlighted in orange.

**Add New Appointment**

My Event Details      Reminder / Recurrence

Event title  
Client Call

All day? ☐

Location  
Teams

Start Time  
Fri 31 Oct 2025 10:00

End Time  
Fri 31 Oct 2025 10:30

Select Branch  
Morgan & Co

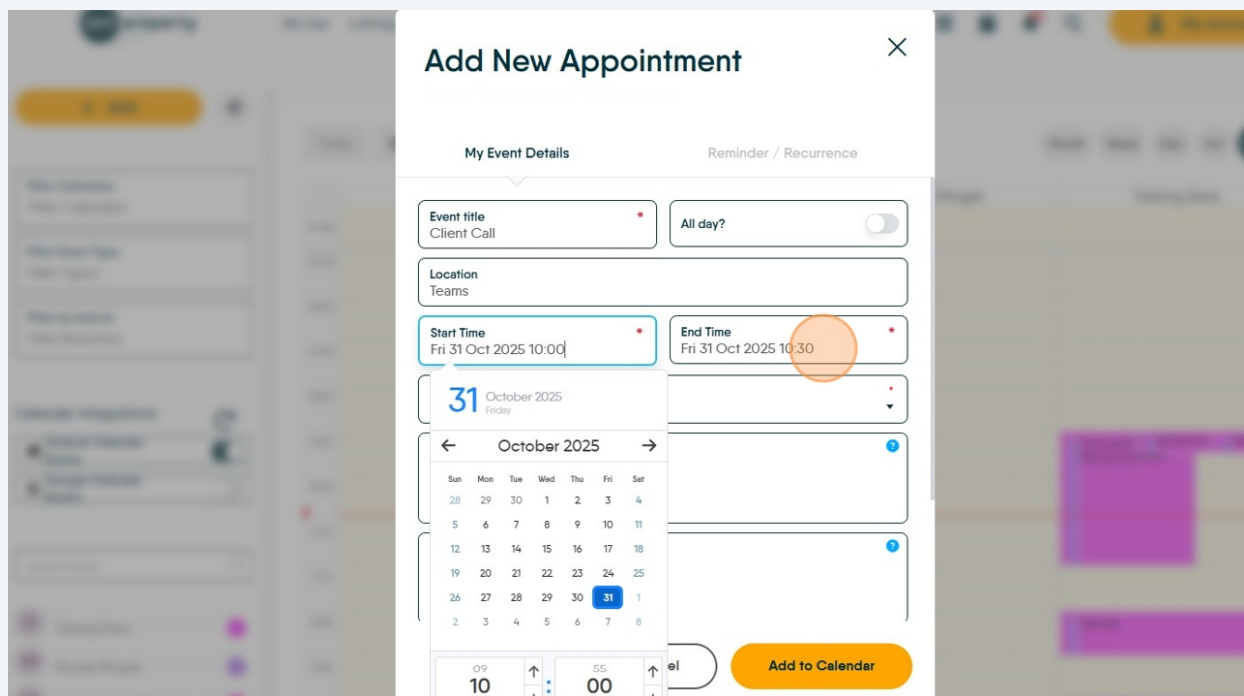
Calendar  
Lettings X

Assign to users  
Training Dave X

Cancel      Add to Calendar

8

Click the **"End Time"** field and set the end date and time.



The screenshot shows the 'Add New Appointment' form with the 'End Time' field highlighted by an orange circle. A date picker is open below the 'Start Time' field, showing the calendar for October 2025. The 'Add to Calendar' button is highlighted in orange.

**Add New Appointment**

My Event Details      Reminder / Recurrence

Event title  
Client Call

All day? ☐

Location  
Teams

Start Time  
Fri 31 Oct 2025 10:00

End Time  
Fri 31 Oct 2025 10:30

31 October 2025  
Friday

October 2025

Sun Mon Tue Wed Thu Fri Sat  
28 29 30 1 2 3 4  
5 6 7 8 9 10 11  
12 13 14 15 16 17 18  
19 20 21 22 23 24 25  
26 27 28 29 30 31 1  
2 3 4 5 6 7 8

09 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31  
10 00

Cancel      Add to Calendar

9

Click **"Assign to users"** if you are creating an appointment for other people, or including others in this appointment.

N.B. this appointment will be visible to anyone who has your calendar enabled in their CRM regardless of that user being added to the 'Assign to Users' field.

The screenshot shows the 'Add New Appointment' form with the following fields and options:

- Event title:** Client Call
- All day?** (toggle switch)
- Location:** Teams
- Start Time:** Fri 31 Oct 2025 10:00
- End Time:** Fri 31 Oct 2025 10:30
- Select Branch:** Morgan & Co
- Calendar:** Lettings (with a close icon)
- Assign to users:** Training Dave (with a close icon)
- Calendar overlay:** Shows the date 31 October 2025 (Friday) with a time picker for 10:30.
- Buttons:** Cancel

10

Click **"Additional Notes"** and add any notes.

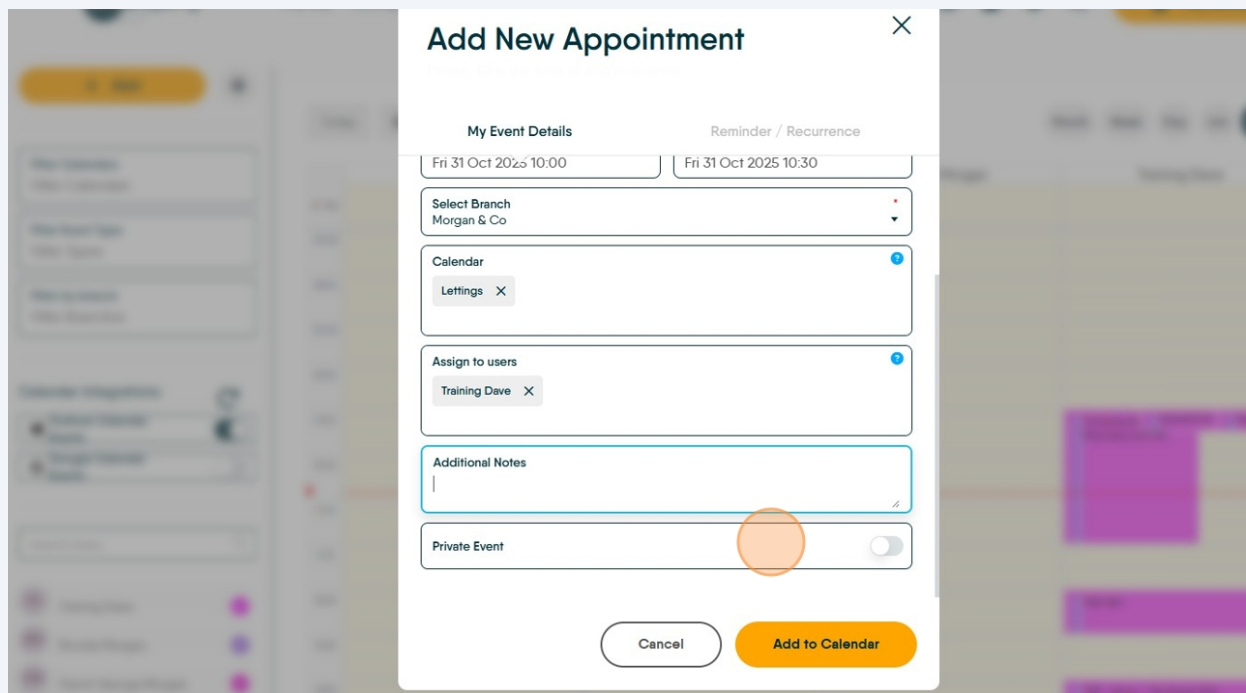
The screenshot shows the 'Add New Appointment' form with the following fields and options:

- Event title:** Client Call
- All day?** (toggle switch)
- Location:** Teams
- Start Time:** Fri 31 Oct 2025 10:00
- End Time:** Fri 31 Oct 2025 10:30
- Select Branch:** Morgan & Co
- Calendar:** Lettings (with a close icon)
- Assign to users:** Training Dave (with a close icon)
- Additional Notes:** (with a text area and a close icon)
- Private Event:** (toggle switch)
- Buttons:** Cancel, Add to Calendar



11

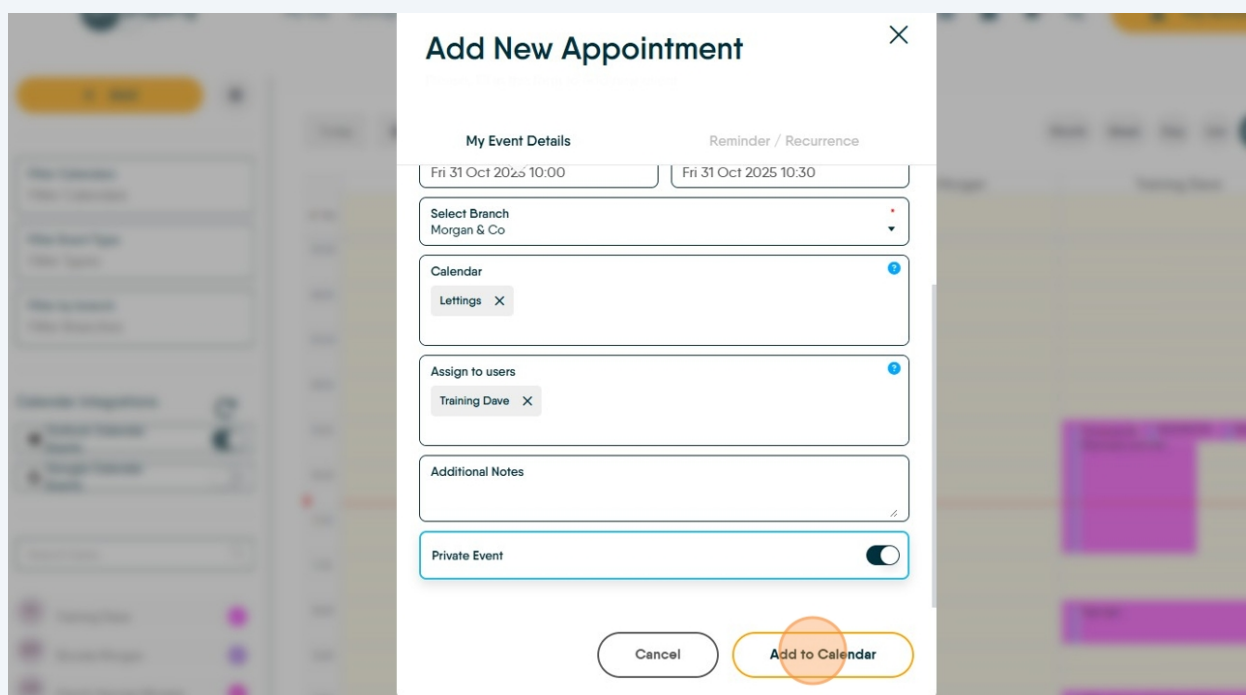
If this is a private appointment, click "**Private Event**" this will mask any additional detail added when viewed by other CRM users.



The screenshot shows the 'Add New Appointment' modal form. It has two tabs: 'My Event Details' (active) and 'Reminder / Recurrence'. Under 'My Event Details', there are two date-time pickers: 'Fri 31 Oct 2025 10:00' and 'Fri 31 Oct 2025 10:30'. Below these are three sections: 'Select Branch' (dropdown menu showing 'Morgan & Co'), 'Calendar' (with a 'Lettings' tag and a close button), and 'Assign to users' (with a 'Training Dave' tag and a close button). There is an 'Additional Notes' text area. At the bottom of the form, there is a 'Private Event' toggle switch, which is currently turned off. An orange circle highlights this toggle switch. At the very bottom are two buttons: 'Cancel' and 'Add to Calendar'.

12

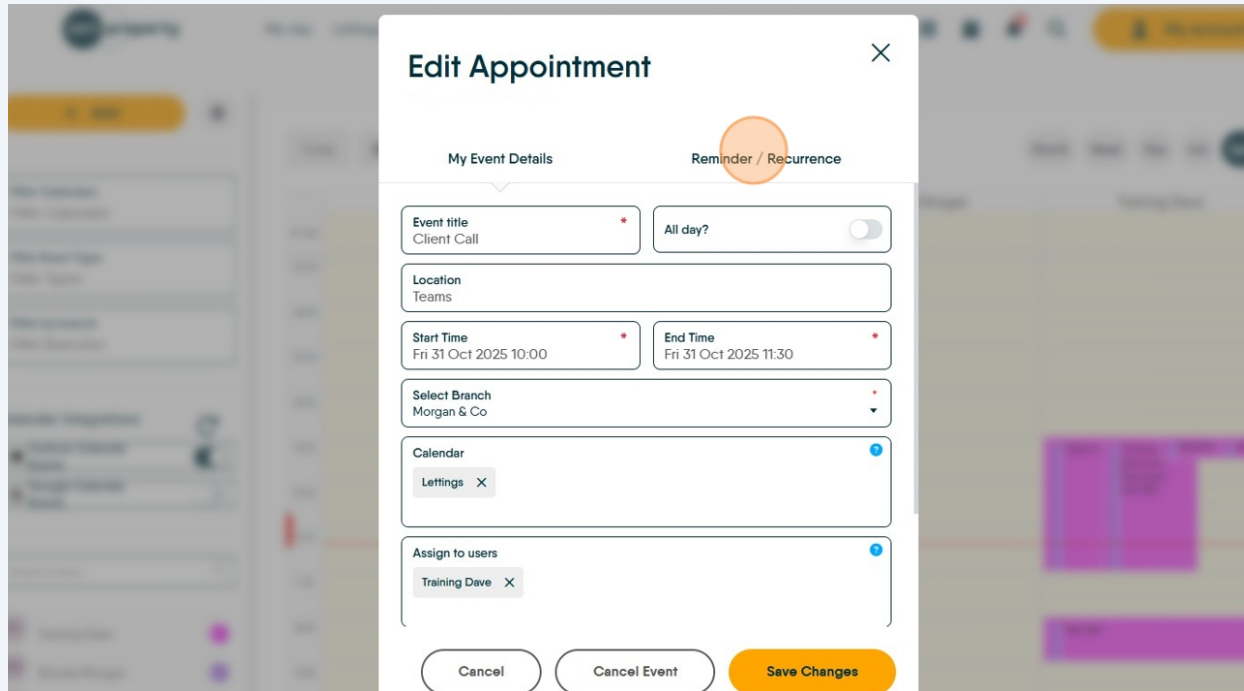
Click "**Add to Calendar**"



This screenshot is identical to the one above, showing the 'Add New Appointment' modal form. However, in this step, the 'Private Event' toggle switch is now turned on. An orange circle highlights the 'Add to Calendar' button at the bottom right of the form.

## Adding Reminder/Recurrence

13 Click "**Reminder / Recurrence**"



The screenshot shows the 'Edit Appointment' modal form. The 'Reminder / Recurrence' tab is highlighted with an orange circle. The form contains the following fields and controls:

- Event title:** Client Call (marked with a red asterisk)
- All day?:** Toggle switch (currently off)
- Location:** Teams
- Start Time:** Fri 31 Oct 2025 10:00 (marked with a red asterisk)
- End Time:** Fri 31 Oct 2025 11:30 (marked with a red asterisk)
- Select Branch:** Morgan & Co (dropdown menu)
- Calendar:** Lettings (with a close button 'X' and a plus icon)
- Assign to users:** Training Dave (with a close button 'X' and a plus icon)

At the bottom of the modal are three buttons: 'Cancel', 'Cancel Event', and 'Save Changes'.



14

Click "**Reminder**" to set any reminders you might need. Click here to set the timescale (hours/minutes/days)

**Edit Appointment**

My Event Details      Reminder / Recurrence

Reminder

0      Minutes

Recurrence

Repeat: Daily      Repeat every: 0 day(s)

Ends: No end date

Cancel      Cancel Event      Save Changes

15

Click here to set whether the reminder is minutes/hours/or days.

**Edit Appointment**

My Event Details      Reminder / Recurrence

Reminder

1      Minutes  
Minutes  
Hours  
Days

Recurrence

Repeat: Daily      Repeat every: 0 day(s)

Ends: No end date

Cancel      Cancel Event      Save Changes

16

Click "**Recurrence**" to set any schedule you want for your appointment to repeat on.

The screenshot shows the 'Edit Appointment' dialog box with the 'Reminder / Recurrence' tab selected. The 'Recurrence' section is highlighted with an orange box. It contains a 'Repeat' dropdown menu with options: Daily, Weekly, Monthly, and Yearly. The 'Repeat every' field is set to 0 days(s). The 'Reminder' section shows a reminder of 1 minute. At the bottom are buttons for 'Cancel', 'Cancel Event', and 'Save Changes'.

17

Click "**Ends**" to set an end date for the appointment schedule.

The screenshot shows the 'Edit Appointment' dialog box with the 'Reminder / Recurrence' tab selected. The 'Ends' dropdown menu is highlighted with an orange box. It contains options: No end date, End on, and End after. The 'Repeat' dropdown menu is set to 'Daily' and the 'Repeat every' field is set to 0 days(s). The 'Reminder' section shows a reminder of 1 minute. At the bottom are buttons for 'Cancel', 'Cancel Event', and 'Save Changes'.

**18** Click here to set the timescale for the repeat.

The screenshot shows the 'Edit Appointment' dialog box with the 'Reminder / Recurrence' tab selected. The 'Reminder' section has a value of '1' and the unit 'Minutes'. The 'Recurrence' section has a dropdown set to 'Repeat Daily' and a 'Repeat every' field with the value '0'. An orange circle highlights the '0' in the 'Repeat every' field. The 'Ends' dropdown is set to 'No end date'. At the bottom are three buttons: 'Cancel', 'Cancel Event', and 'Save Changes'.

**19** Click "Save Changes"

This screenshot is identical to the previous one, but the orange circle now highlights the 'Save Changes' button at the bottom right of the dialog box.

20

The appointment will then show in your calendar and be repeated as per your settings.

The screenshot displays a calendar application interface. At the top, there's a navigation bar with 'Today', 'Fri 31 Oct 2025', and navigation arrows. Below this, a view selector shows 'Month', 'Week', 'Day', 'List', and 'Split View' (selected). The main calendar area is a grid with columns for 'Brooke Morgan', 'David-George Morgan', 'James Morgan', and 'Training Dave'. The rows represent time slots from 08:00 to 13:30. A 'Client Call' event is highlighted in the Training Dave column at 10:00-11:30. A tooltip for this event shows details: Calendar: Lettings, Username: Training Dave, Event Type: Appointment, Event Time: 10:00 - 11:30, Private: Yes. Other events include 'Client C', 'Formus Accounts Discovery with MD', 'Appraisal', 'Test test', and 'DM - Jenny - The Home Club'.

	Brooke Morgan	David-George Morgan	James Morgan	Training Dave
all-day				
08:00				
08:30				
09:00				
09:30				
10:00				Client Call
10:30				Client C, Formus Accounts Discovery with MD, Appraisal, Appraisal
11:00				
11:30				
12:00				Test test
12:30				
13:00				DM - Jenny - The Home Club
13:30				