

Managing Applicant Submitted Viewing Feedback



CRM allows customers to leave their own feedback on a Viewing they have attended.

Learn how to efficiently manage and record this customer feedback in your CRM and transfer private notes to public fields. This guide streamlines the process of managing property viewing documentation to keep your records accurate.



Alert! This feature is enabled from the CRM Configuration menu. You can learn how to do this from [here](#)

This process is identical for both Sales and Lettings feedback.

Feedback Submission - Viewers Process



Alert! **This section is purely for your information and to show what the Viewer will see in their email and how the Viewer leaves their feedback. This will help if you are asked to support a Viewer in leaving feedback.**

The text, used in the email shown below, will be different to the text used in your email as this is for demonstration purposes only.

1

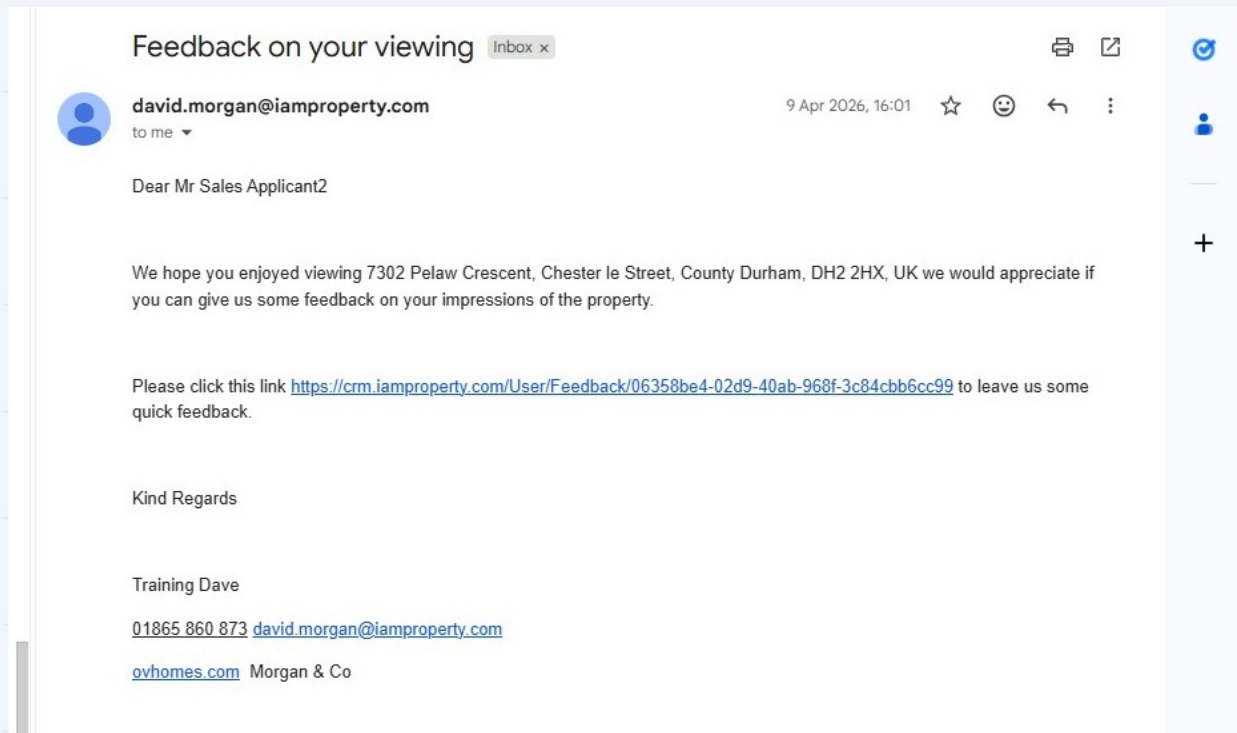
Your applicant will receive an email after the viewing (the timing of this is set in the configuration for the auto feedback email 1 hour+) This contains a link.

The Viewers process is shown below.

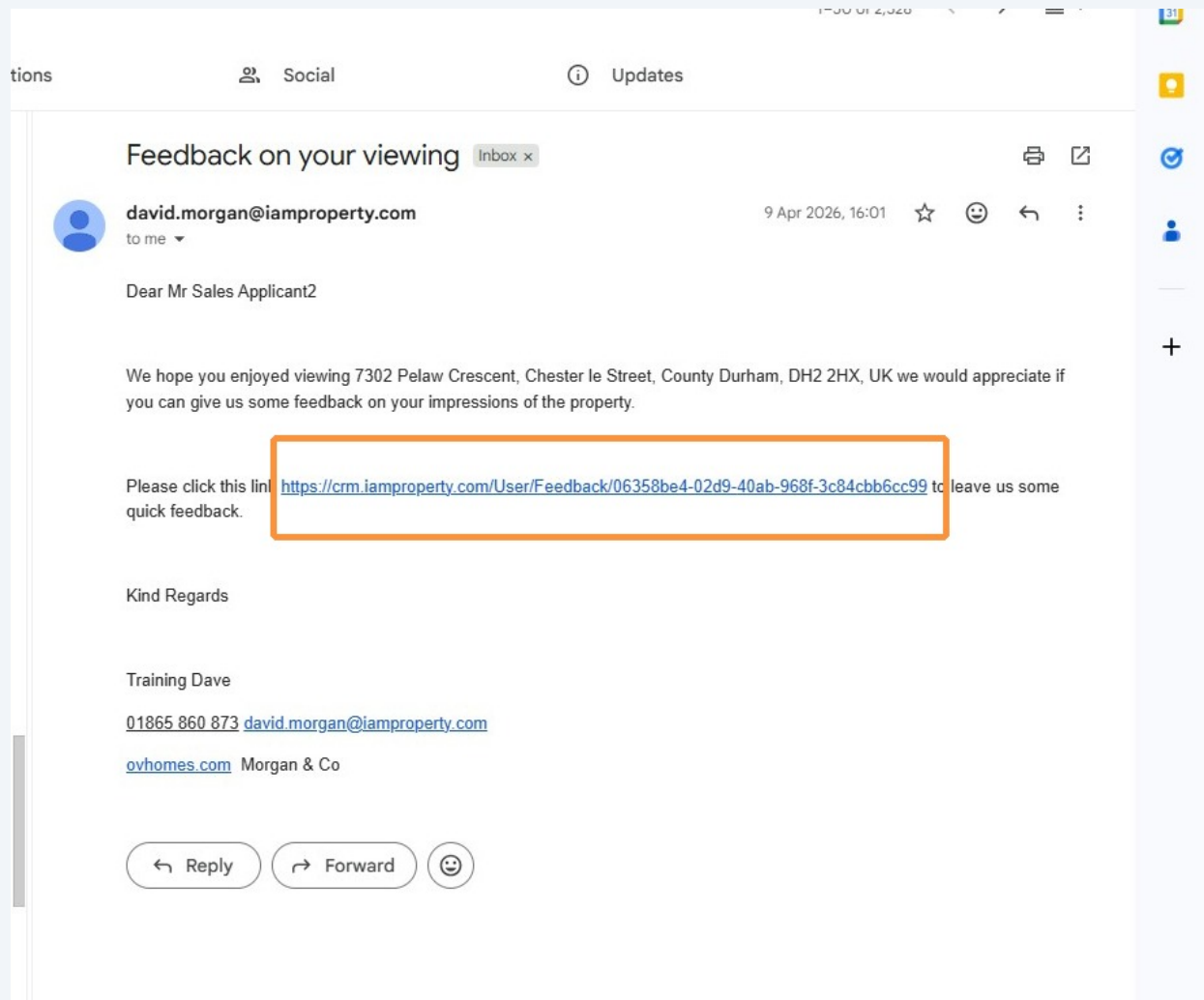
2

The viewer will receive an email similar to this in their inbox.

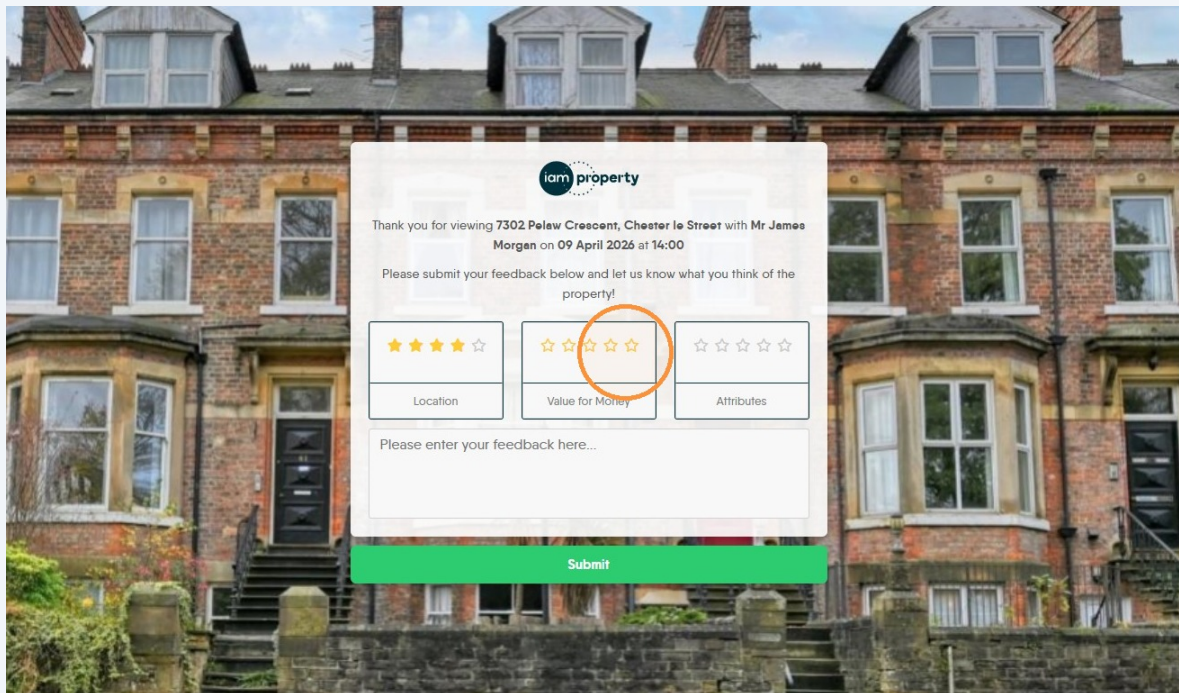
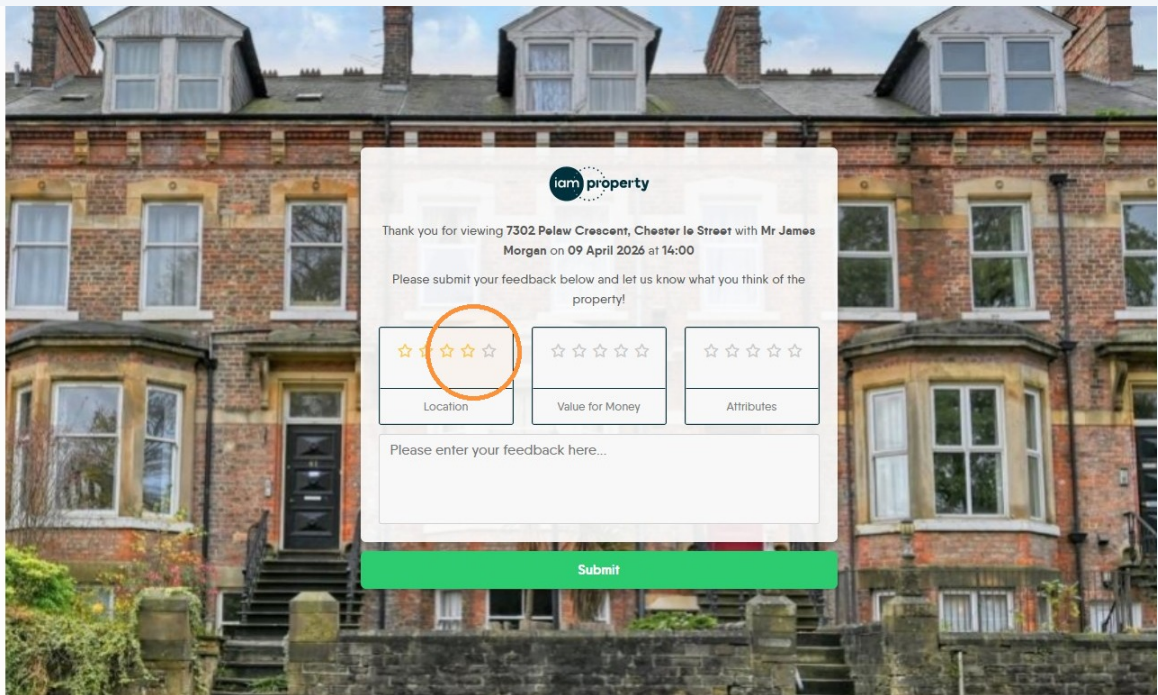
The name of the viewer and the address details are automatically entered when the email is sent.

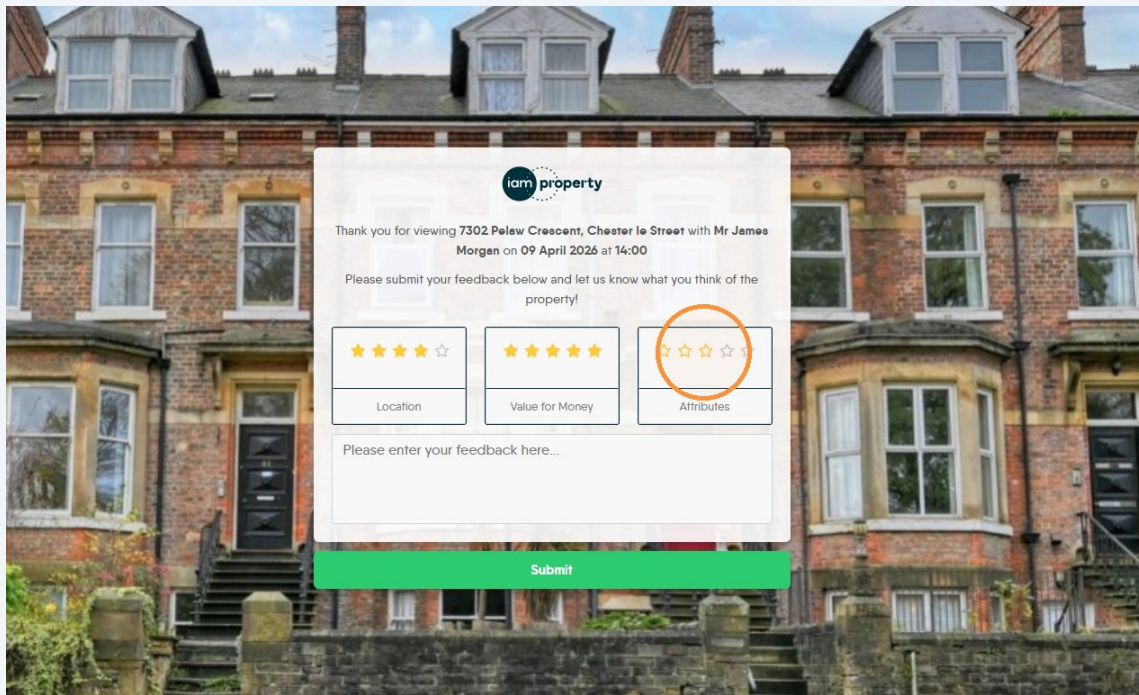


3 The Viewer clicks the **'feedback'** link

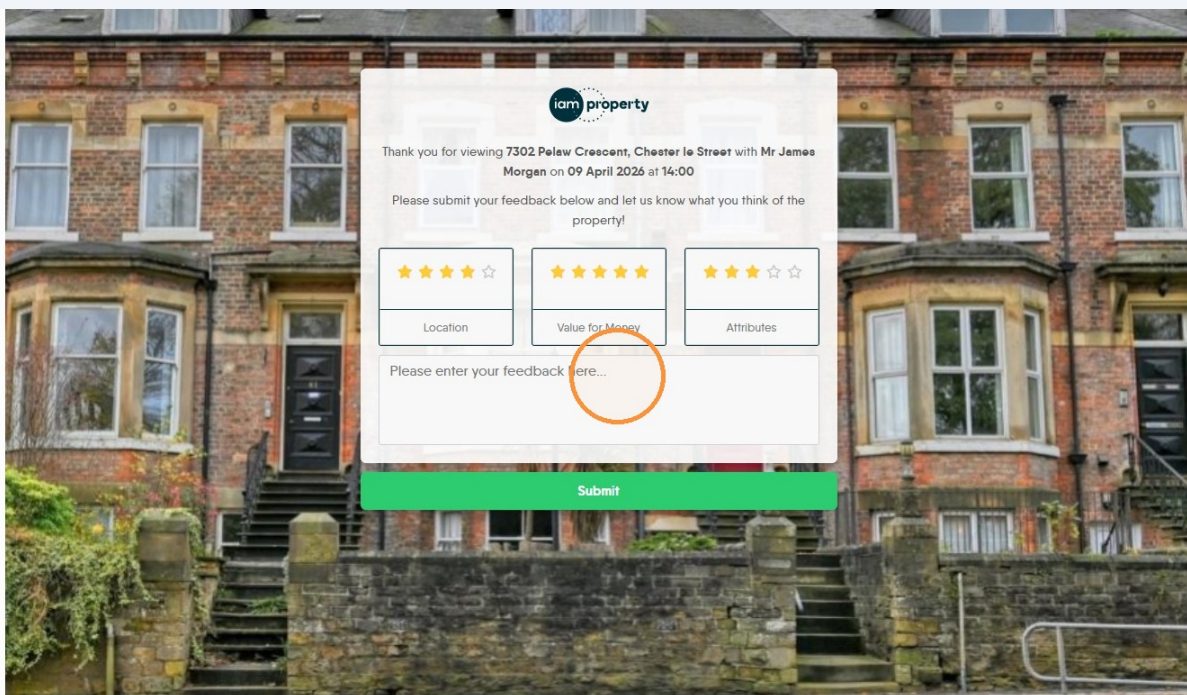


4 The Viewer provides star ratings for Location, Value for Money, and Attributes.





5 The Viewer types their comments into the feedback text field.



6 Click "Submit"

iam property

Thank you for viewing 7302 Pelew Crescent, Chester le Street with Mr James Morgan on 09 April 2026 at 14:00

Please submit your feedback below and let us know what you think of the property!

★★★★☆ Location

★★★★★ Value for Money

★★★★☆ Attributes

Lovely property, needs redecroating nice area

Submit

How does the Agent Manage the Feedback?

7 From the **CRM dashboard**. There will also be a notification in the 'Bell' at the top right of the screen.

iam property

My day Lettings Sales Accounts Reporting Communications

Properties 89

Vendors 89

Applicants 54

Sales Progression 47

Pending Offers 7

Portals

Key Controls

Activity List

- Today/Overdue
- Tenure Expiring 2
- Vendor Checklist 3
- Vendors Not Contacted 47
- Viewings Applicant Feedback Received 1
- Viewings Requiring Feedback 7

Please select an activity list item to begin

8

Click **"Viewings Applicant Feedback Received"** in the Activity List. This will show all the feedback that has been left by applicants. It is sorted by the person who booked/conducted the viewing.

The dashboard displays several key metrics in a row of cards:

- Properties: 89
- Vendors: 89
- Applicants: 54
- Sales Progression: 47
- Pending Offers: 7
- Portals: (icon)
- Key Contr: (icon)

Below the metrics is the 'Activity List' section. It contains a list of items with icons, counts, and external links:

- Today/Overdue: (icon)
- Tenure Expiring: 2 (icon)
- Vendor Checklist: 3 (icon)
- Vendors Not Contacted: 47 (icon)
- Viewings Applicant Feedback Received: 1 (icon)** (highlighted with an orange circle)
- Viewings Requiring Feedback: 7 (icon)
- Unconfirmed Viewings: 26 (icon)

The main content area to the right of the activity list is empty and contains the text: "Please select an activity list item to begin".

9

From this line you can see all the required detail about the viewing including Applicant details and Vendor details .

Click the actions menu icon (three dots) for the menu. There are various option in this list, you can very easily add journal records, send emails etc from here.

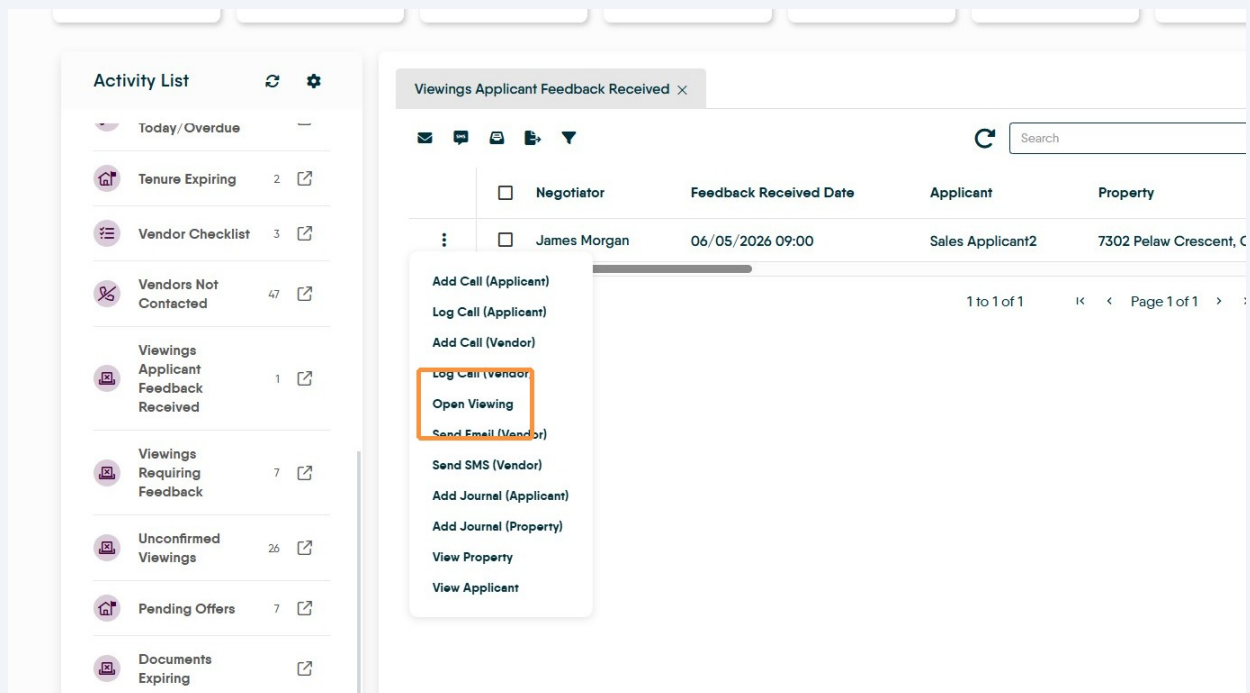
The screenshot displays a software dashboard with several key components:

- Top Metrics Bar:** Contains six cards with the following data:
 - Vendors: 89
 - Applicants: 54
 - Sales Progression: 47
 - Pending Offers: 7
 - Portals: (Icon of a location pin and lock)
 - Key Control: (Icon of a key)
- Left Sidebar:** A 'Property List' with a refresh and settings icon. It includes a search bar and a list of items:
 - Today/Overdue: 1
 - Tenure Expiring: 2
 - Vendor Checklist: 3
 - Vendors Not Contacted: 47
 - Viewings Applicant Feedback Received: 1
 - Viewings Requiring Feedback: 7
 - Inconfirmed Viewings: 26
- Main Content Area:**
 - Header:** 'Viewings Applicant Feedback Received' with a close icon. Below it are icons for email, chat, calendar, and a funnel, along with a search bar.
 - Table:**

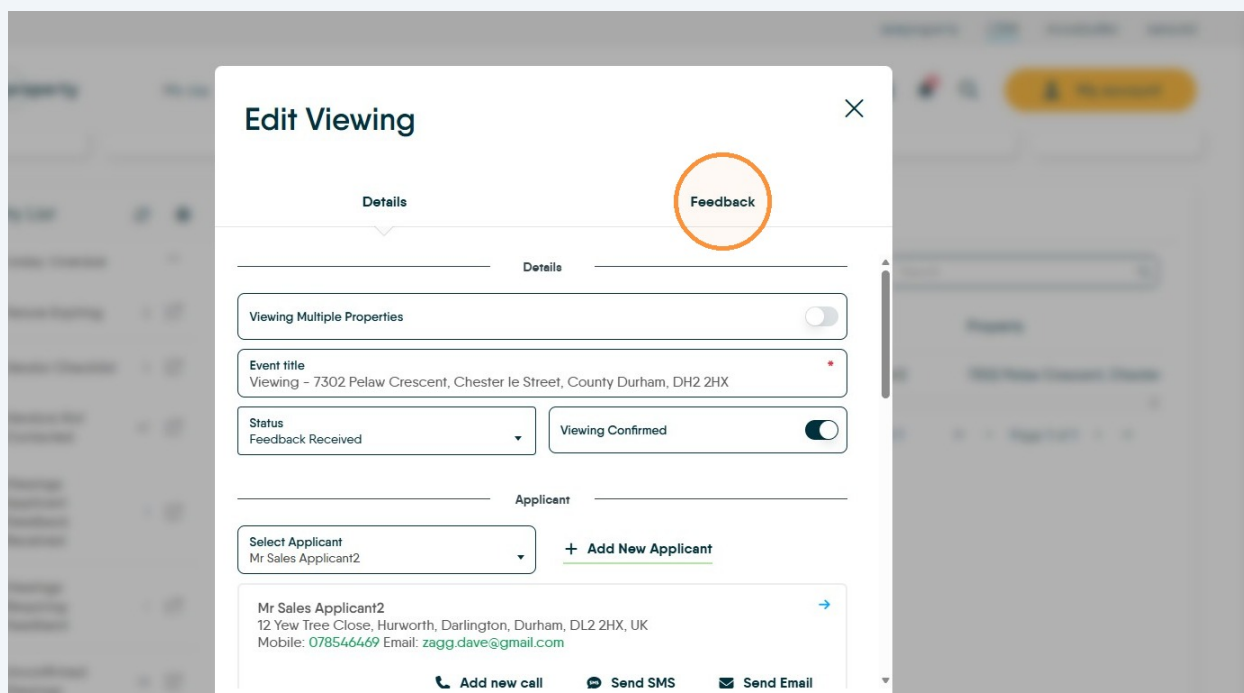
	Negotiator	Feedback Received Date	Applicant	Property
	☐ James Morgan	06/05/2026 09:00	Sales Applicant2	7302 Pelaw Crescent, Chest...
 - Actions Menu:** A dropdown menu is open for the first row, listing actions:
 - Add Call (Applicant)
 - Log Call (Applicant)
 - Add Call (Vendor)
 - Log Call (Vendor)
 - Open Viewing
 - Send Email (Vendor)
 - Send SMS (Vendor)
 - Add Journal (Applicant)
 - Add Journal (Property)
 - View Property
 - View Applicant
 - Footer:** Pagination shows '1 to 1 of 1' and 'Page 1 of 1'.

Feedback Review and Publication

- 10 Click **"Open Viewing"** this will take you to the viewing record.



- 11 Navigate to the **"Feedback"** tab within the Viewing details.



12

In here you can see all the feedback received from the Viewer. Highlight and copy the text from the Private Feedback field.

The screenshot shows a 'Feedback' modal with two tabs: 'Details' and 'Feedback'. Under 'Feedback', there are two buttons: 'Email Form To Applicant' and 'SMS Form To Applicant'. Below these are three star rating sections: 'Location', 'Value for Money', and 'Attributes'. The 'Private Feedback' field is highlighted with an orange circle. The text in the field is '- Applicant Feedback: Lovely property, needs redo of croating nice area'. The 'Public Feedback' field is empty. At the bottom, there are buttons for 'Save Private Template...', 'Save Public Template...', 'Cancel', 'Delete', and 'Save Viewing'.

The screenshot shows the 'Edit Viewing' modal. The 'Private Feedback' field is highlighted with a blue box, and the text '- Applicant Feedback: Lovely property, needs redo of croating nice area' is copied. The 'Public Feedback Notes' field is empty. At the bottom, there are buttons for 'Save Private Template...', 'Save Public Template...', 'Cancel', 'Delete', and 'Save Viewing'.

13

Paste the feedback text into the **Public Feedback Notes** field here you can moderate the feedback if required.

Details Feedback

Email Form To Applicant SMS Form To Applicant

★★★★☆ Location ★★★★★ Value for Money ★★★★★☆ Attributes

Private Feedback Public Feedback

- Applicant Feedback: Lovely property, needs redecorating nice area Public Feedback Notes

Save Private Template... Save Public Template...

Cancel Delete Save Viewing

Edit Viewing

Details Feedback

Email Form To Applicant SMS Form To Applicant

★★★★☆ Location ★★★★★ Value for Money ★★★★★☆ Attributes

Private Feedback Public Feedback

- Applicant Feedback: Lovely property, needs redecorating nice area Public Feedback Notes

Save Private Template... Save Public Template...

Cancel Delete Save Viewing

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At this point you can contact the Vendor (or Landlord) and discuss the feedback received, any viewing notification (in Property or Applicant records) will show an 'Applicant Received' flag. If the Vendor or Landlord have access to their portals they can view the feedback in there

15 Click **"Save Viewing"** to apply and save changes.

The feedback will be marked as received as it does not require further chasing.

The screenshot shows a mobile application interface for providing feedback. At the top, there are two tabs: 'Details' and 'Feedback', with 'Feedback' being the active tab. Below the tabs, there are two orange buttons: 'Email Form To Applicant' and 'SMS Form To Applicant'. Under these buttons are three star rating sections: 'Location' (4 stars), 'Value for Money' (5 stars), and 'Attributes' (4 stars). Below the ratings are two text input areas: 'Private Feedback' and 'Public Feedback'. The 'Private Feedback' area contains the text: '- Applicant Feedback: Lovely property, needs redecorating nice area'. The 'Public Feedback' area contains the text: 'Lovely property, needs redecorating to suit our tastes, nice area.' Below these text areas are two buttons: 'Save Private Template...' and 'Save Public Template...', each with an orange icon. At the bottom of the form are three buttons: 'Cancel', 'Delete', and 'Save Viewing'. The 'Save Viewing' button is highlighted with an orange circle.