

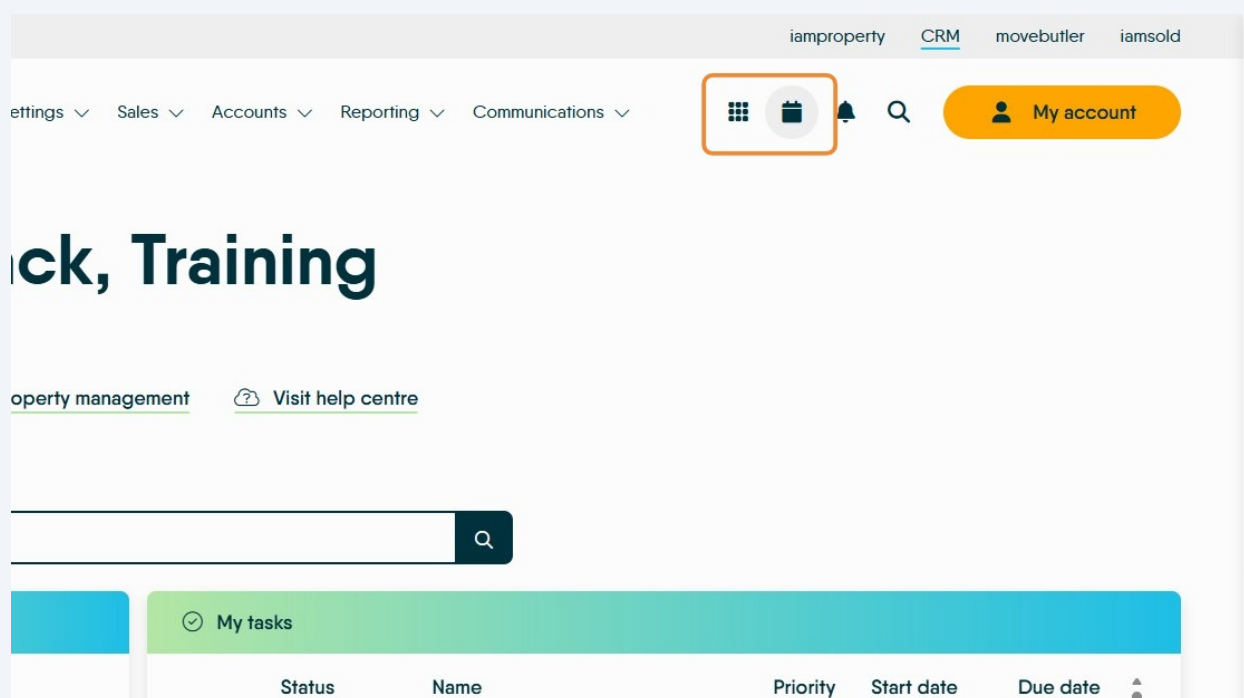
# Updated - CRM Calendar



Learn how to effectively manage your daily schedule by adjusting calendar views and event settings. This guide walks you through the configuration steps needed to organize your sales and lettings appointments efficiently.

1

Navigate to <https://crm.iamproperty.com/MyDay> the calendar can be accessed from either the Quick Access menu (aka bento/rubics cube) or by using the Calendar icon. Both at the top right of the CRM screen. These icons will always be visible regardless of the screen you are using in CRM.



## Open Calendar

Click "**Calendar**" icon, there are other ways to open the calendar however, this is the easiest.

iamproperty

CRM

movebutler

iamsold

My day

Lettings

Sales

Accounts

Reporting

Communications

My account

# Welcome back, Training

New Record

View property management

Visit help centre

Records

My day's events

Jemmas 8-4.30

Test test

Test test

My tasks

|   | Status      | Name             | Priority | Start date  | Due date    |
|---|-------------|------------------|----------|-------------|-------------|
| ⋮ | Not Started | Deliver leaflets | High     | 30/Jan/2026 | 07/Feb/2026 |
| ⋮ | Not Started | deliver leaflets | High     | 06/Feb/2026 | 08/Feb/2026 |

This will open the Calendar screen.

iamproperty

My day

Lettings

Sales

Accounts

Reporting

Communications

Grid

Calendar

Notifications

Search

My account

Add Event

Today

<

Tue, Sep 15, 2026

>

Settings

Split (Comfy)

Reset filters

Calendar type

Event type

Branch

Sync Outlook events

Sync Google events

Hide cancelled events

User

Search users

Search

Show only my events

Training Dave (Me)

Tuesday

|         | Training Dave  | Brooke Morgan  | James Morgan   |
|---------|----------------|----------------|----------------|
| all-day | Jemmas 8-4.30  |                |                |
| 08:00   |                |                |                |
| 08:30   |                |                |                |
| 09:00   |                |                |                |
| 09:30   |                |                |                |
| 10:00   | Appraisal Slot | Appraisal Slot | Appraisal Slot |
| 10:30   |                |                |                |

4

At the top right of the screen (under 'My Account') is an option that will allow the calendar view to be changed. There are a number of views, default is Month view. The view shown on screen is 'Split (comfy)' Click "Split (Comfy)"

The screenshot shows the iamproperty CRM interface. At the top right, under the 'My account' dropdown, the 'Split (Comfy)' view is selected and highlighted with an orange box. The calendar displays a split view for Tuesday, September 15, 2026, with columns for Training Dave, Brooke Morgan, and James Morgan. Events include 'Jemmas 8-4:30' and 'Appraisal Slot'.

This screenshot shows the same iamproperty CRM interface, but with the view selection dropdown menu open. The menu lists several options: 'Split (Comfy)', 'Week', 'Split (Comfy)', 'Split (Compact)', 'Month', 'Day', and 'List'. The 'Split (Comfy)' option is highlighted with an orange box, indicating it is the selected view.

## Create Event



Tip! The best way to create a calendar entry for either an Appraisal or a Viewing is to use the **'Add New Record'** option in the quick access menu or on the My Day screen. These are quicker and easier than the process from within the calendar.

5

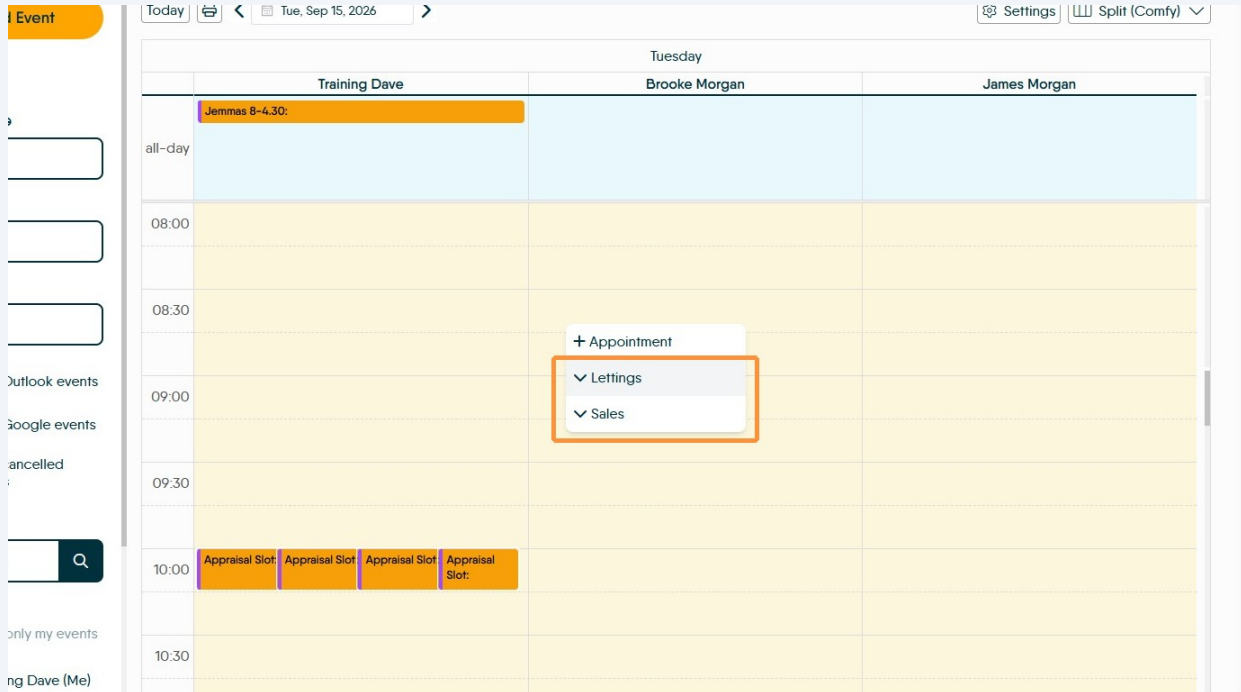
The easiest way to create an event in the calendar is to 'Right-click' on the time and date that the event is to be created. In this case we are in the 'Split' view so we can also select a specific user.

The screenshot displays a calendar application in 'Split (Comfy)' view for Tuesday, September 15, 2026. The interface includes a left sidebar with filters like 'Event', 'Outlook events', and 'Google events'. The main calendar area is split into three columns: 'Training Dave', 'Brooke Morgan', and 'James Morgan'. An orange circle highlights the 08:30 time slot in the 'Brooke Morgan' column, indicating where a user can right-click to create a new event. Existing events include an all-day event 'Jemmas 8-4:30' and four 'Appraisal Slot' events starting at 10:00.

6

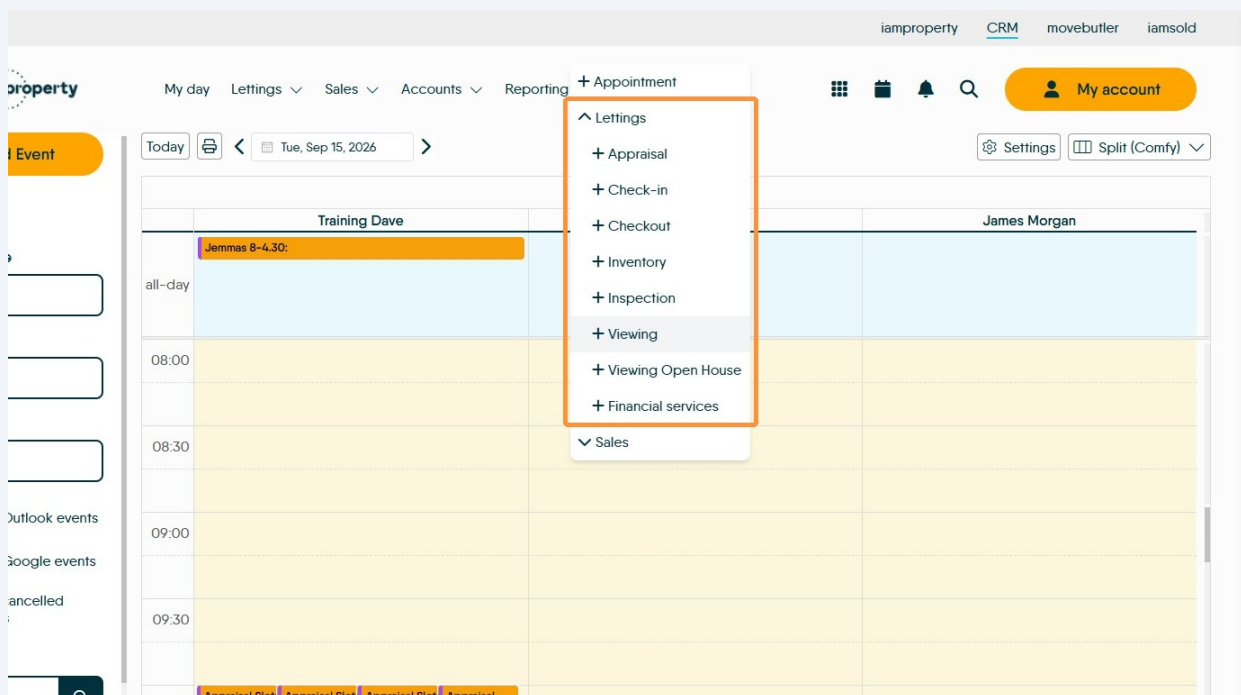
Click "**Lettings**" or "**Sales**" and select the appointment type from the drop down list.

The "**Appointment**" option is designed to be used for creating personal appointments, e.g holidays, noting working days etc. Not for booking customer appointments



7

These are the options for a **Lettings** calendar entry



## 8

These are the options for adding a **Sales** calendar entry

Event Today Tue, Sep 15, 2026 Settings Split (Comfy)

Tuesday

|         | Training Dave                                                   | Brooke Morgan | James Morgan |
|---------|-----------------------------------------------------------------|---------------|--------------|
| all-day | Jemmas 8-4.30:                                                  |               |              |
| 08:00   |                                                                 |               |              |
| 08:30   |                                                                 |               |              |
| 09:00   |                                                                 |               |              |
| 09:30   |                                                                 |               |              |
| 10:00   | Appraisal Slot: Appraisal Slot: Appraisal Slot: Appraisal Slot: |               |              |
| 10:30   |                                                                 |               |              |

+ Appointment  
✓ Lettings  
✓ Sales

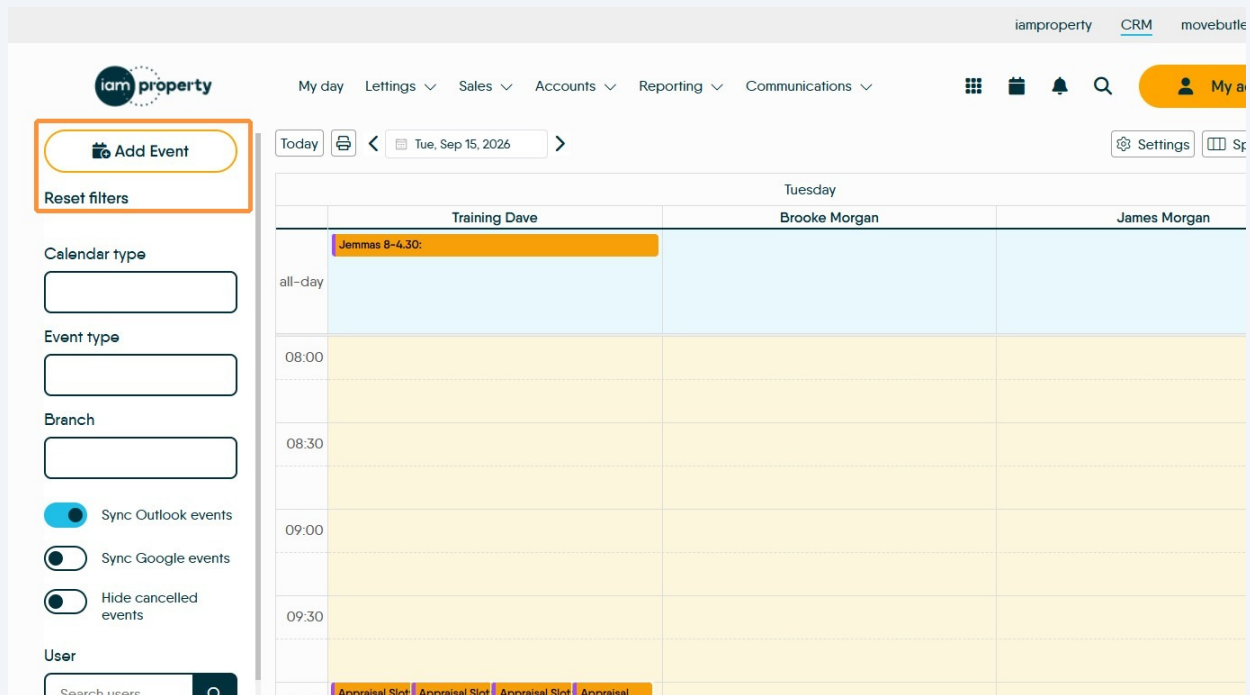
Event Today Tue, Sep 15, 2026 Settings Split (Comfy)

Tuesday

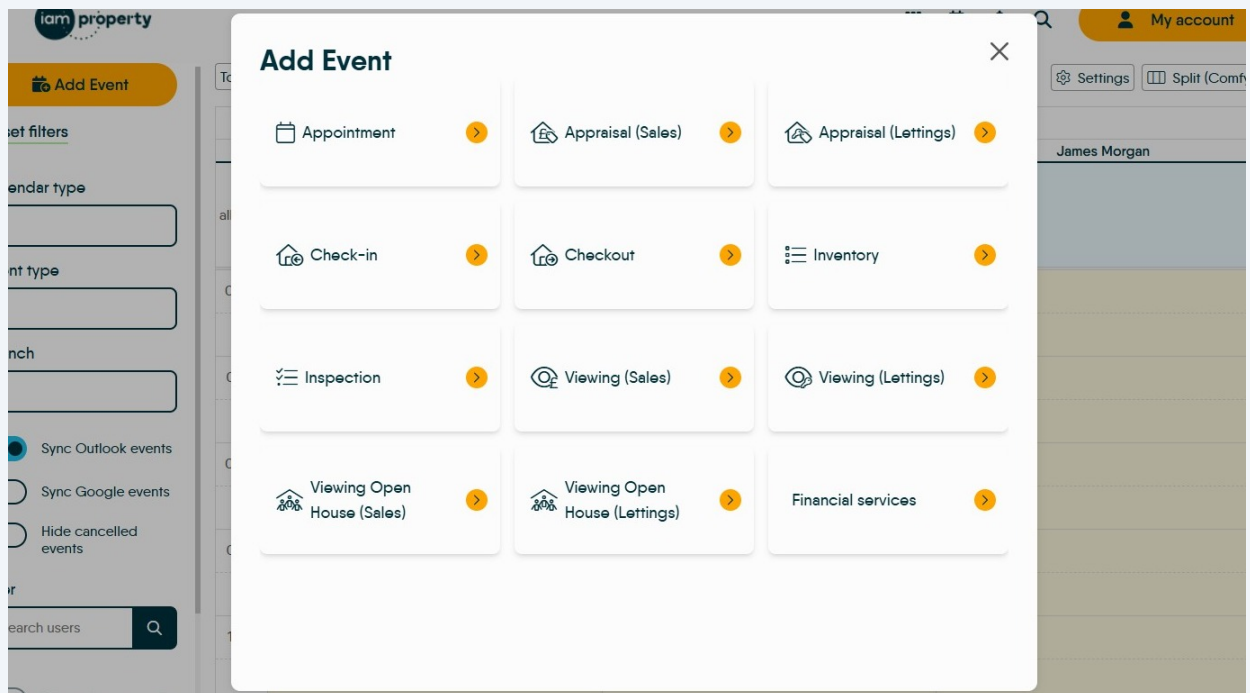
|         | Training Dave                                                   | Brooke Morgan | James Morgan |
|---------|-----------------------------------------------------------------|---------------|--------------|
| all-day | Jemmas 8-4.30:                                                  |               |              |
| 08:00   |                                                                 |               |              |
| 08:30   |                                                                 |               |              |
| 09:00   |                                                                 |               |              |
| 09:30   |                                                                 |               |              |
| 10:00   | Appraisal Slot: Appraisal Slot: Appraisal Slot: Appraisal Slot: |               |              |
| 10:30   |                                                                 |               |              |

+ Appointment  
✓ Lettings  
^ Sales  
+ Appraisal  
+ Viewing  
+ Viewing Open House  
+ Financial services

9 The alternative way to create an event in the calendar is to click **"Add Event"**



10 These are the options when **"Add Event"** is clicked,



11

These options down the left side of the screen act as filters, if left as shown (empty) all calendar data is shown on the screen. If there is an entry in any of the fields only that data will show on the calendar.

For example, if Sales is selected in the 'Calendar type' field, the only entries that will show are those added to the sales calendar.

Our advise is keep these fields clear unless you definitely only need to see a specific data set and nothing else.

The screenshot displays the iamproperty CRM interface. On the left, a sidebar contains a 'Reset filters' button and three filter fields: 'Calendar type', 'Event type', and 'Branch', each with a text input box. Below these are three toggle switches: 'Sync Outlook events' (checked), 'Sync Google events' (unchecked), and 'Hide cancelled events' (unchecked). At the bottom of the sidebar is a 'User' section with a search bar and a magnifying glass icon. The main area shows a calendar for Tuesday, September 15, 2026. The calendar grid has columns for 'Training Dave', 'Brooke Morgan', and 'James Morgan'. A red event bar labeled 'Jemmas 8-4.30' is visible in the 'Training Dave' column. The bottom of the grid shows several 'Appraisal Slot' events.

## Calendar Settings

12

To select individual user calendars, they can be selected using the checkboxes on the left side of the screen. This will enable the calendars for all the selected users to show on the calendar screen either in 'Split View' (as shown below) or as coloured boxes in a week or month view.

The users that are shown are taken from the Branches that you have enabled in you 'Active Branches' option.

The screenshot shows a calendar interface. On the left, there is a sidebar with the following options:

- Event type**: A text input field.
- Branch**: A text input field.
- Sync Outlook events**: A toggle switch (checked).
- Sync Google events**: A toggle switch (unchecked).
- Hide cancelled events**: A toggle switch (unchecked).
- User**: A search bar with the text "Search users" and a magnifying glass icon.
- Show only my events**: A toggle switch (unchecked).
- Training Dave (Me)**: A checkbox (checked) with an orange circle icon.
- Brooke Morgan**: A checkbox (checked) with a purple circle icon.
- David-George Morgan**: A checkbox (unchecked) with a pink circle icon.
- James Morgan**: A checkbox (checked) with a red circle icon.
- VTUK User**: A checkbox (unchecked) with a grey circle icon.

On the right, the calendar view shows a grid for Tuesday, Sep 15, 2026. The columns are labeled "Training Dave", "Brooke Morgan", and "James Morgan". The rows are labeled "all-day", "08:00", "08:30", "09:00", "09:30", "10:00", and "10:30". There are orange event blocks for "Jemmas 8-4.30:" and "Appraisal Slot" at 10:00.

13

Click **"Settings"** this will give various options, if you need weekends to show in your calendar this can be enabled in this screen as can a change in working hours.

The screenshot shows the same calendar interface as above, but with the "Settings" button highlighted by an orange circle. The "Settings" button is located in the top right corner of the calendar view, next to the "Split (Comfy)" button. The "Settings" button has a gear icon.

14

Each User is allocated a colour, if you want to change this colour. Click **Background Colour** this option allows the background colour of the user tile to be changed. **Text Colour** allows the colour of the text on the tile to be changed.

N.B. If a light background colour is selected, make sure the text colour is dark so it is easily read and the same if background is dark use a light colour text.

**Calendar Configuration Settings**

General Integration Settings

Show weekends?  
☒ Yes ☐ No

Start Time \* 08:00 End Time \* 18:00

Background Colour \* Text Colour \*

Custom calendar types

Add custom calendar type

Type custom calendar type name Add

Save User Settings

15

Your Outlook or Google Calendars can also be shown in the CRM calendar and your CRM calendar shown in Outlook/Google calendars.

Enabling the option, by sliding the toggle will show a login screen, successful completion of the login will enable your calendars to sync.

iam property

My day Lettings Sales Accounts Reporting Communications

Event type

Branch

Sync Outlook events

Sync Google events

Hide cancelled events

User

Search users

Show only my events

Training Dave (Me)

Today

<

Tue, Sep 15, 2026

>

Tuesday

Training Dave

Brooke Morgan

Jemmas 8-4:30:

all-day

08:00

08:30

09:00

09:30

Sign in with Google

OPEN VIEW

Sign in

to continue to OpenView

Email or phone

Forgot email?

Before using this app, you can review OpenView's Privacy Policy and Terms of Service.

11