

# How To Send A Property Viewing Confirmation Email



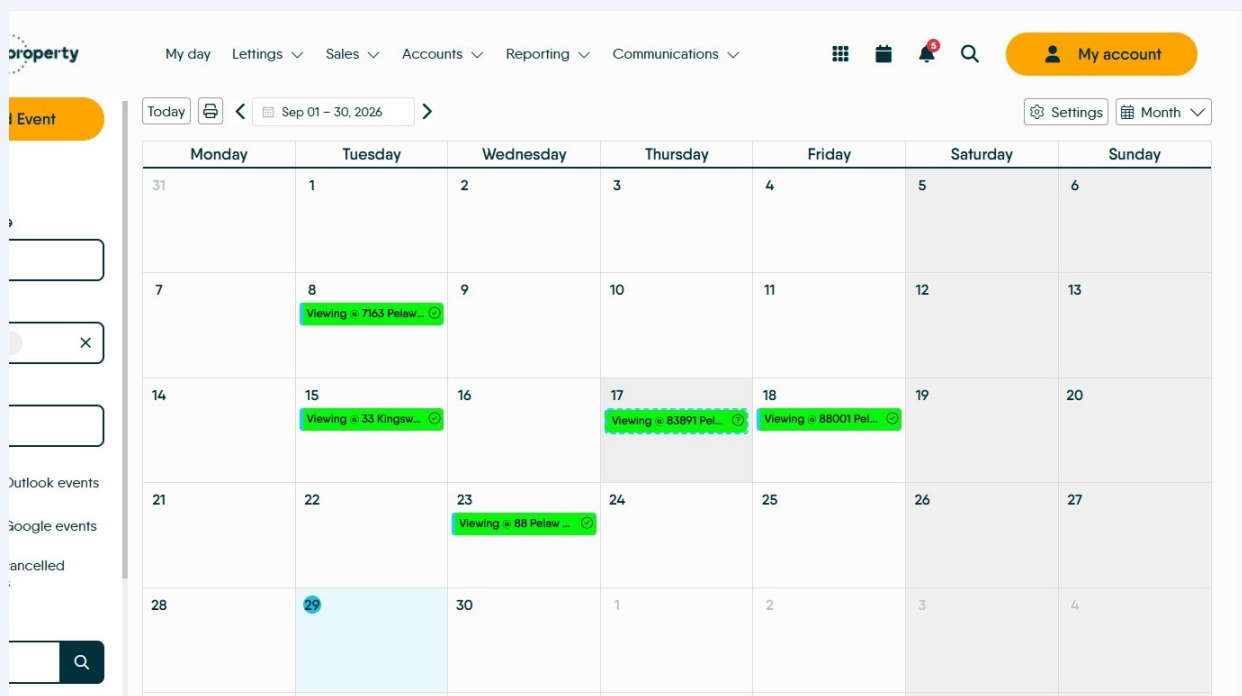
Follow this guide to easily confirm property viewings with your clients using the CRM calendar. You will learn how to select the correct viewing appointment and send a professional confirmation email using pre-built templates.



Tip! This is the same process for both sales and lettings viewings. It is also the same process if you are setting a confirmation for an Appraisal.

## Calendar Access

### 1 Navigate to your CRM calendar



### 2

A calendar entry that has a dashed outline is an un confirmed appointment. Hovering your mouse over the appointment entry will also show the details of the appointment.  
Step

The image shows a calendar application with a grid of dates. A date '17' is highlighted with an orange border. A green event label 'Viewing @ 83891 Pel...' is overlaid on the date. A dark blue tooltip is open over the event, displaying the following details:

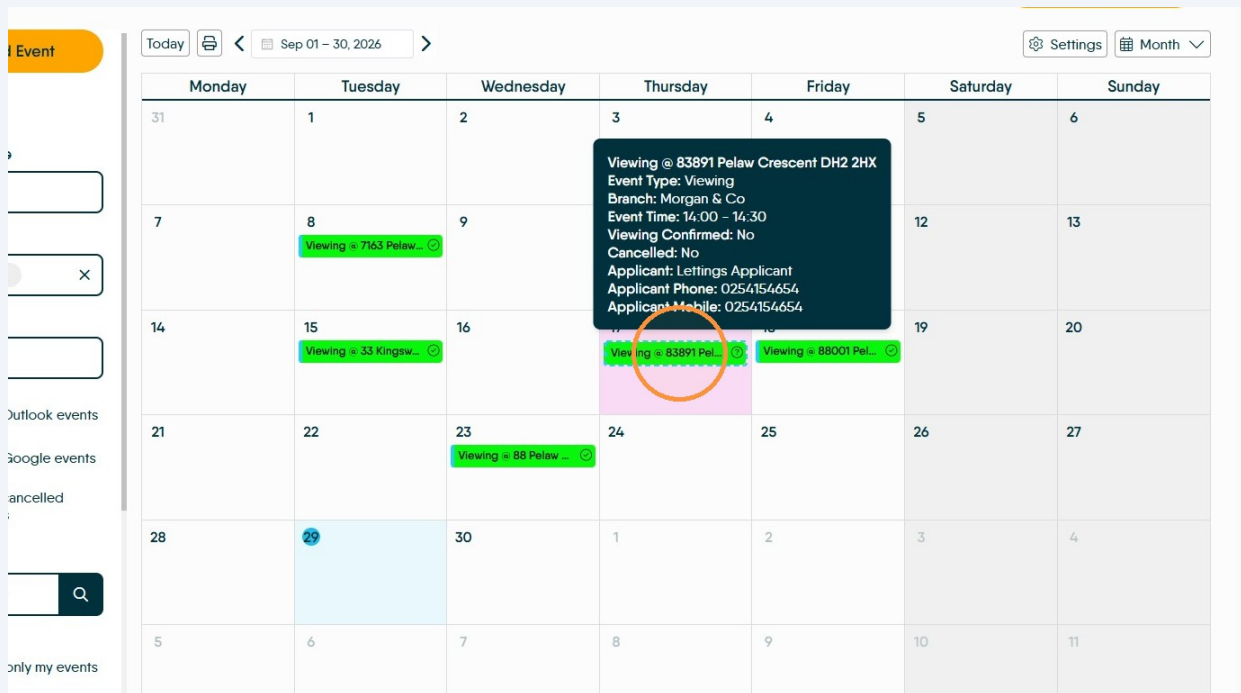
- Viewing @ 83891 Pelaw Crescent DH2 2HX**
- Event Type: Viewing**
- Branch: Morgan & Co**
- Event Time: 14:00 – 14:30**
- Viewing Confirmed: No**
- Cancelled: No**

Other dates visible in the calendar include 16, 18, 23, 24, 25, 30, 1, 2, 3, 9, 12, 19, and 26. Some dates have green event labels, and some are highlighted with green bars.

## Event Details

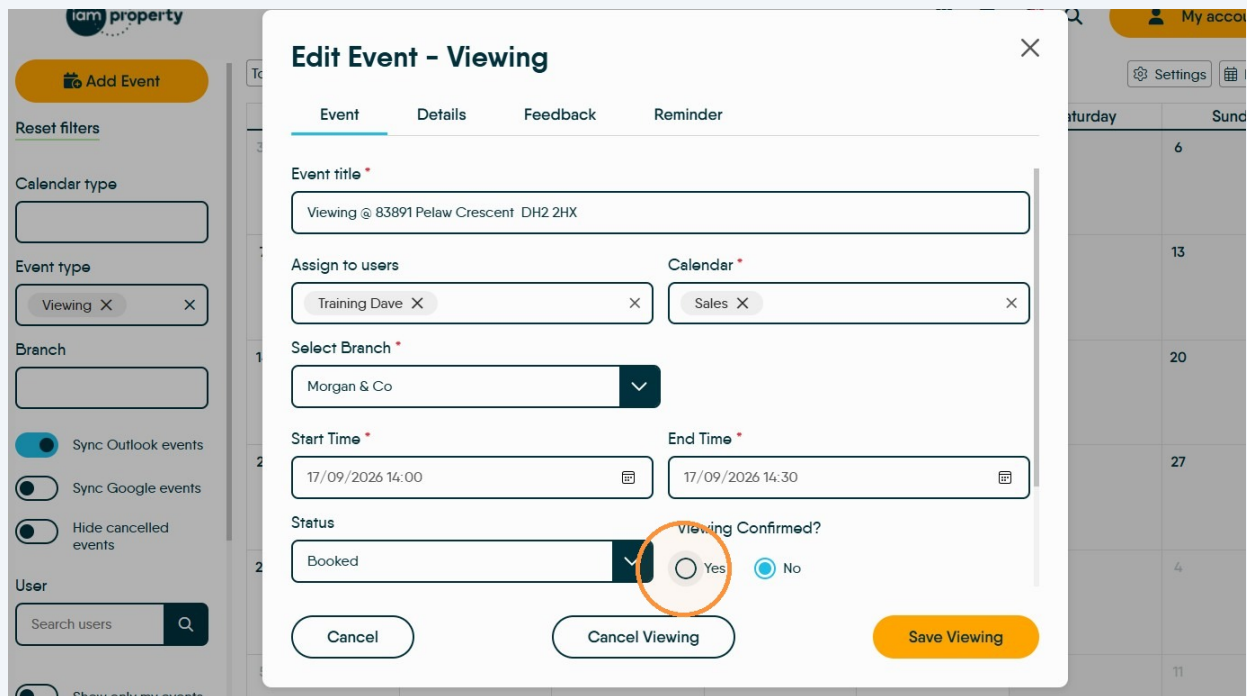
3

Click into the viewing record e.g. "Viewing @ 83891 Pelaw Crescent DH2 2HX:"



4

Select Yes for "Viewing Confirmed?"



5

If you do not have the automation to send a confirmation for you. To send a confirmation email, click "**Details**"

**Edit Event - Viewing**

Event Details Feedback Reminder

Event title \*  
Viewing @ 83891 Pelaw Crescent DH2 2HX

Assign to users  
Training Dave X

Calendar \*  
Sales X

Select Branch \*  
Morgan & Co

Start Time \*  
17/09/2026 14:00

End Time \*  
17/09/2026 14:30

Status  
Booked

Viewing Confirmed?  
☒ Yes ☐ No

Cancel Cancel Viewing Save Viewing

## Email Notification

6

Click **Send email** in the applicant section

**Edit Event - Viewing**

Event Details Feedback Reminder

Select Applicant \*  
Lettings Applicant - zaggy.dave@gmail.com

Add New Applicant Record

Mr Lettings Applicant  
Address: .,  
Email: zaggy.dave@gmail.com Mobile: 0254154654

Add call Send SMS **Send email** View Applicant

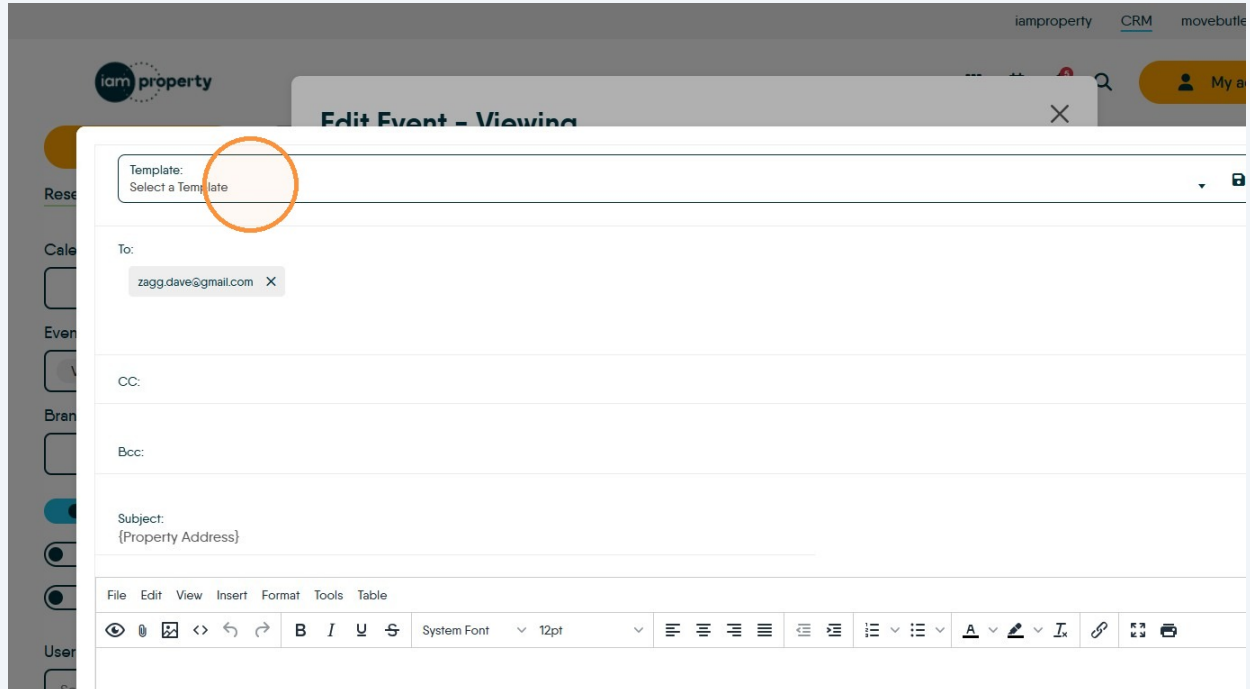
Viewing Multiple Properties?  
☐ Yes ☒ No

Select Property \*

Cancel Cancel Viewing Save Viewing

7

If you have a template created then select your 'Viewing Confirmation - Sales' email template  
Click Send Email



iamproperty CRM movebutle

**Edit Event - Viewing**

Template: Select a Template

To: zaggy.dave@gmail.com X

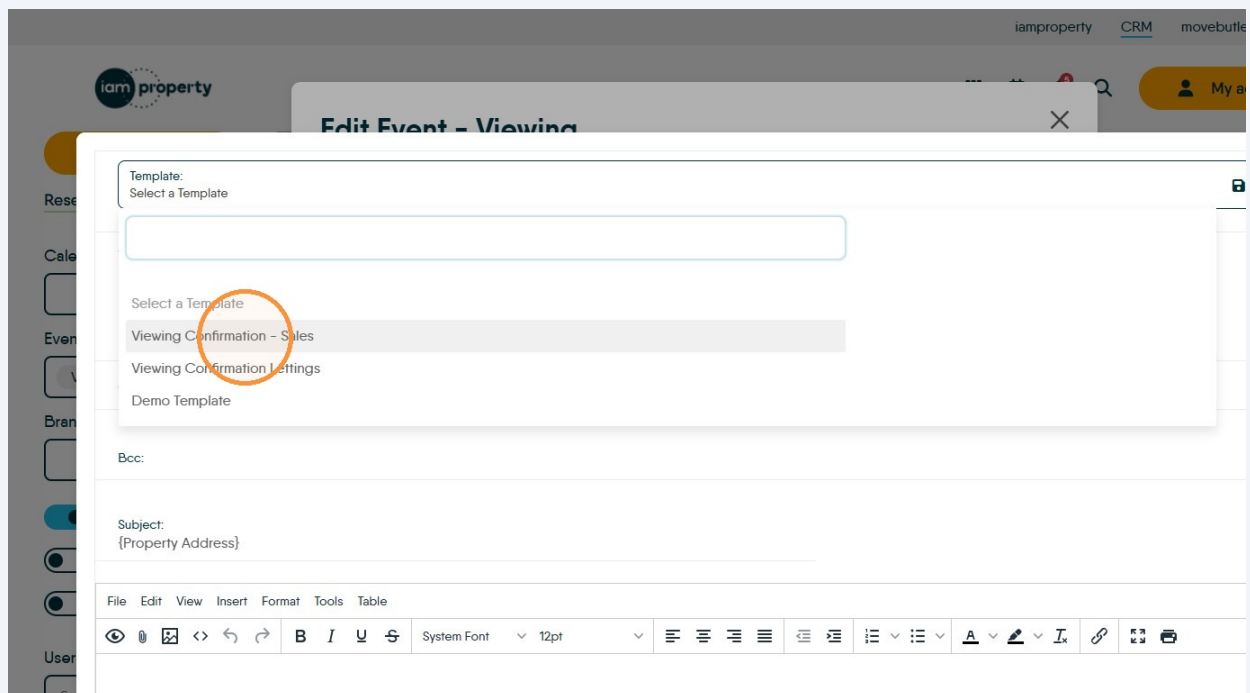
CC:

Bcc:

Subject: {Property Address}

File Edit View Insert Format Tools Table

System Font 12pt



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**Edit Event - Viewing**

Template: Select a Template

Select a Template

- Viewing Confirmation - Sales
- Viewing Confirmation Lettings
- Demo Template

Bcc:

Subject: {Property Address}

File Edit View Insert Format Tools Table

System Font 12pt

Hi {App. Title} {App. Forename} {App. Surname}

Confirmation of your viewing at {Prop. Property Address} which is a {Prop. Property Bedrooms} Bedroom, {Prop. Property Bathrooms} Bathroom {Prop. Property Receptions} reception property, priced at {Prop. Property Price}

Directions to the Property; {Prop. Google Directions}

Viewing date and time; {Prop. Viewing Date and Time}

If you are running late or cannot attend please call the office on {Branch Phone 1}

Template Tags

|                         |                             |                            |                           |                                |                                |                        |                       |               |
|-------------------------|-----------------------------|----------------------------|---------------------------|--------------------------------|--------------------------------|------------------------|-----------------------|---------------|
| Prop. Google Directions | Prop. Viewing Date and Time | App. Company Name          | App. Phone                | App. Work phone                | App. Mobile phone              | App. Email             | App. Title            | App. Forename |
| App. Surname            | App. Bathrooms              | App. Bedrooms              | App. Min. Price           | App. Max. Price                | App. Full Address              | App. Address           | App. Town             | App. Postcode |
| App. Move In Date       | Prop. Property Bedrooms     | Prop. Property Bathrooms   | Prop. Property Receptions | Prop. Property Price           | Prop. Property Price Prefix    | Prop. Property Address | Prop. Advertising Url |               |
| Prop. Virtual Tour Url  | Prop. Property Currency     | Prop. Property Description | Prop. Property Summary    | Prop. Property SMS Description | Prop. Property SMS Description | Branch Name            |                       |               |
| Branch Phone 1          | Branch Phone 2              | Branch Email               | Branch Fax                | Branch Property No             | Branch Address 1               | Branch Address 2       | Branch Town           | Branch County |
| Branch Postcode         | Branch Logo URL             | User Title                 | User Forename             | User Surname                   | User Phone                     | User Work Phone        | User Email            | User Mobile   |
| User Company            | User Job Title              |                            |                           |                                |                                |                        |                       |               |

**Send Email**

8

To send a notificaton to the Vendor/Landlord, scroll down the screen to the property section and click send email, the process is as above.

**Edit Event - Viewing**

Event Details Feedback Reminder

88 Pelaw Crescent, DH2 2HX Chester le Street, County Durham, UK

Add New Property Record

88 Pelaw Crescent, DH2 2HX Chester le Street, County Durham, UK

Type: Semi-Detached House Bathrooms: 1 Bedrooms: 3

Add call Send SMS **Send email** View property

Keys Held Key No Access Code

Yes No

Viewing Arrangements

Cancel Cancel Viewing Save Viewing

Save Changes

## 9 Click "Save Viewing"

**Edit Event - Viewing**

Event Details Feedback Reminder

Select Applicant \*

Lettings Applicant - zaggy.dave@gmail.com

Add New Applicant Record

Mr Lettings Applicant

Address: . .

Email: zaggy.dave@gmail.com Mobile: 0254154654

Add call Send SMS Send email View Applicant

Viewing Multiple Properties?

☐ Yes ☒ No

Select Property \*

Cancel Cancel Viewing Save Viewing

## 10 The viewing record will now have a solid outline in the calendar.

|                       |                                |                                 |                                |    |
|-----------------------|--------------------------------|---------------------------------|--------------------------------|----|
|                       | 9                              | 10                              | 11                             | 12 |
| ing @ 7163 Pelaw... ☑ |                                |                                 |                                |    |
| ing @ 33 Kingsw... ☑  | 16                             | 17<br>Viewing @ 83891 Pela... ☑ | 18<br>Viewing @ 88001 Pel... ☑ | 19 |
|                       | 23<br>Viewing @ 88 Pelaw ... ☑ | 24                              | 25                             | 26 |
| 30                    | 1                              | 2                               | 3                              |    |