

Viewing and Managing Viewer Feedback for a Property Viewing



1

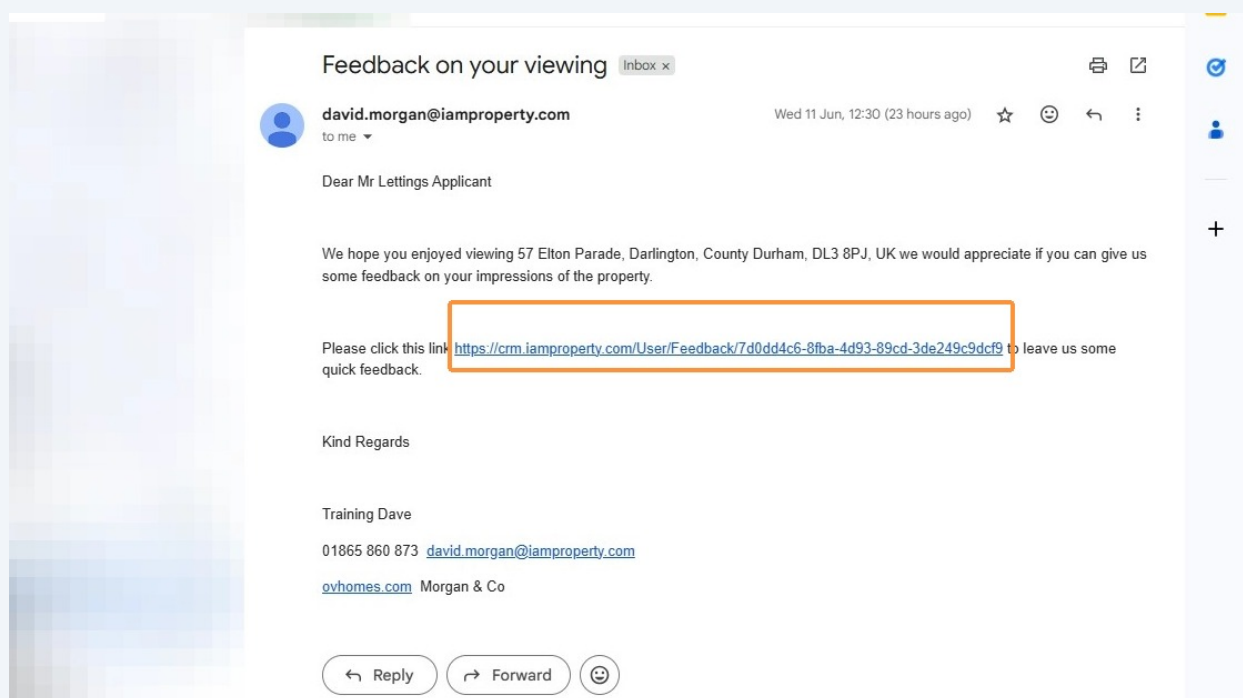
If you have enabled the Viewing Templates and set the Auto Send option your viewer will get the request for the feedback via email or SMS (as set by you).

The request can be manually pushed from the feedback section of the viewing record. In this guide we will look at feedback request sent via the Auto Send option.

The content of this email and the time delay (from the time of the viewing) is set by You, creating this is covered in another guide.

2

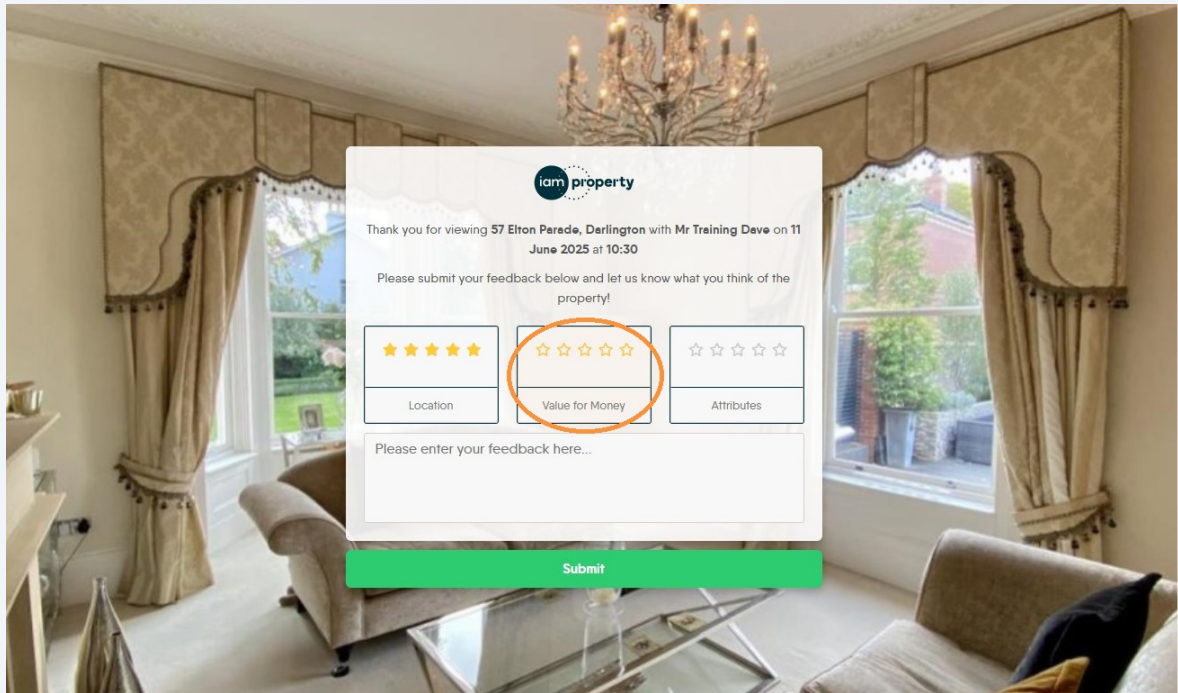
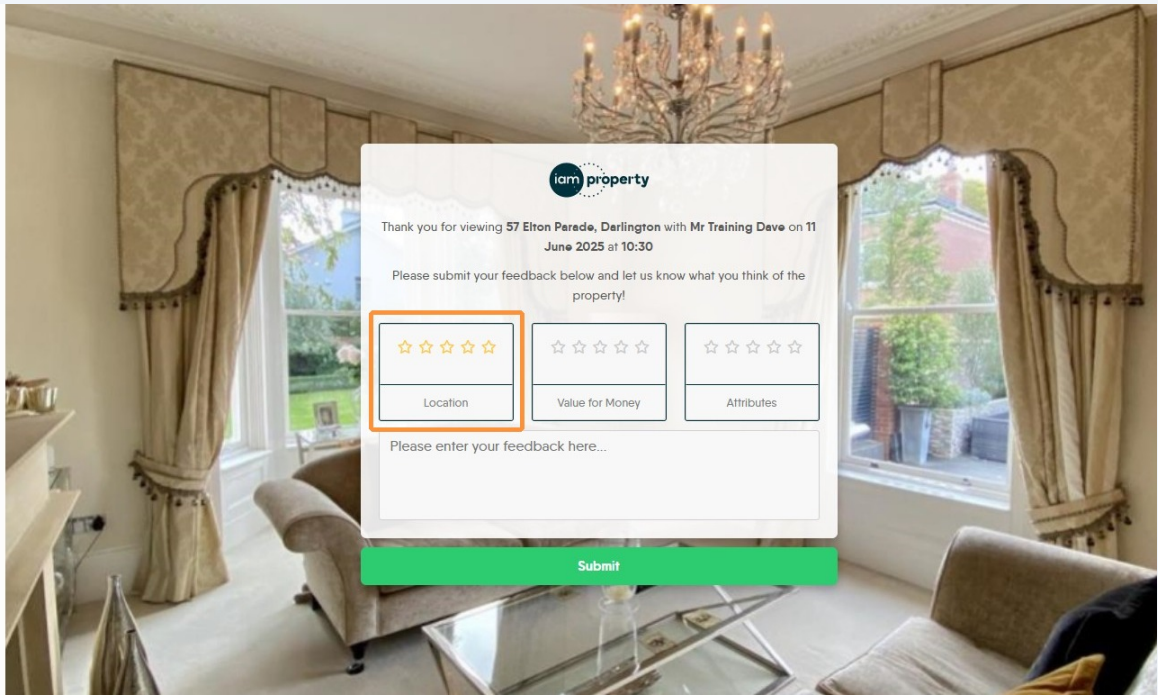
Click the link in the email

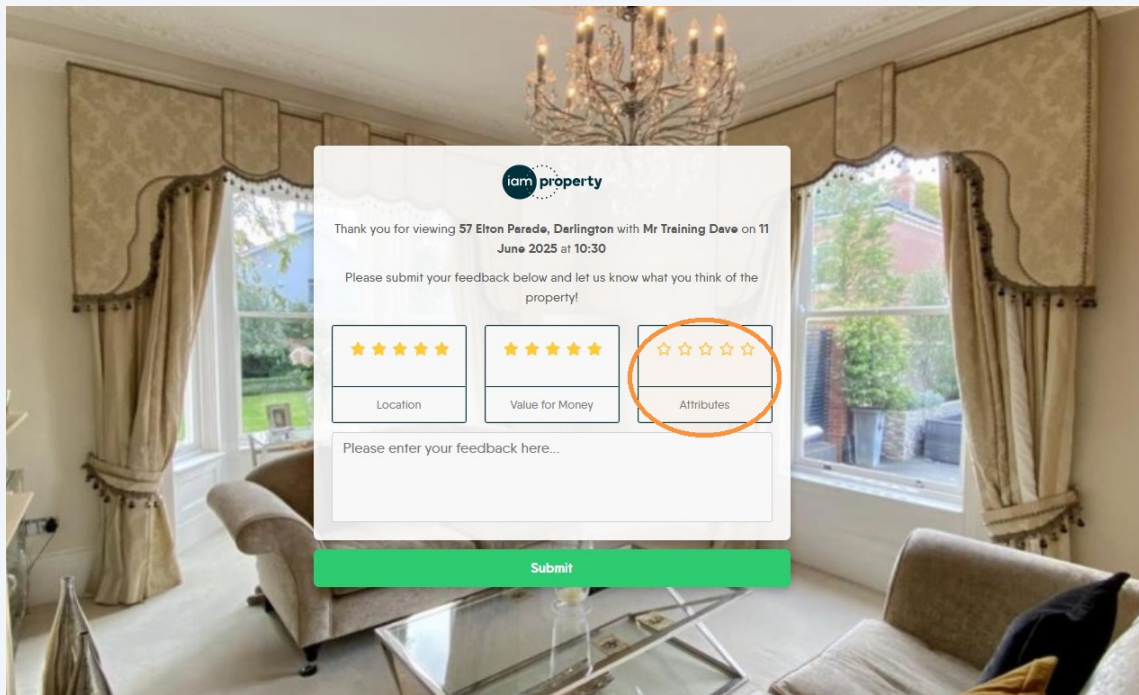


3

The Viewer will be taken to this screen where they can leave their feedback.

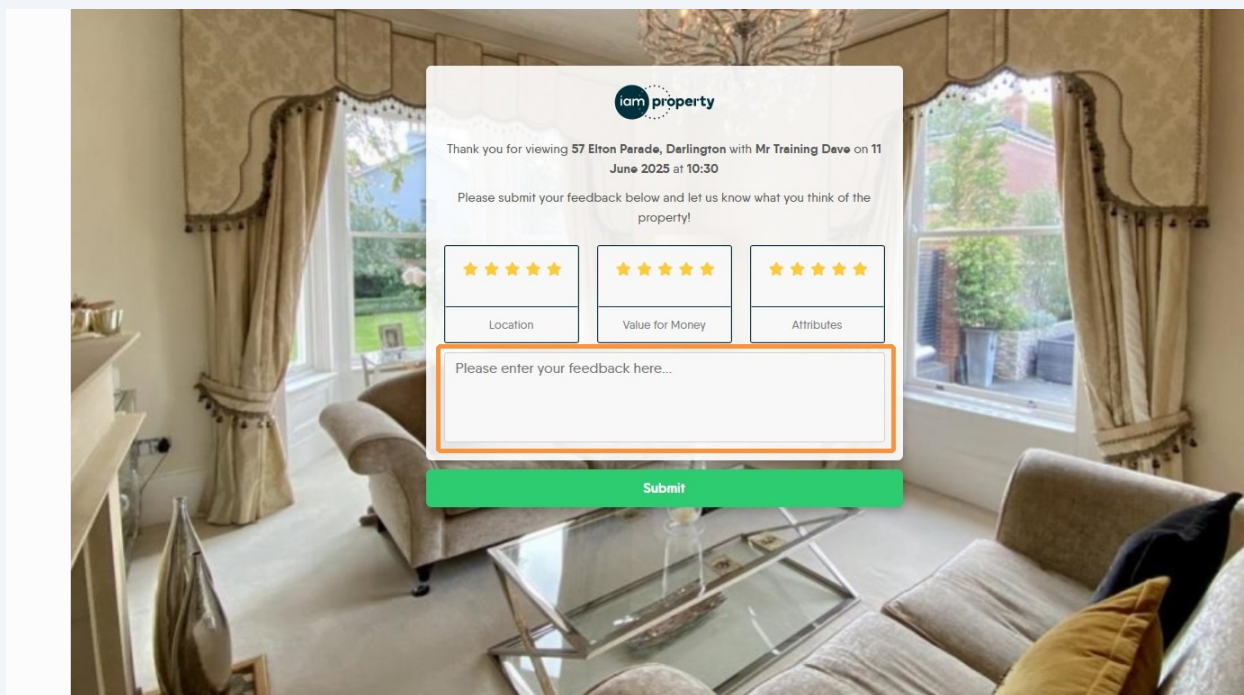
The star ratings are shown on the screen are shown as an average on the viewing tile once added.

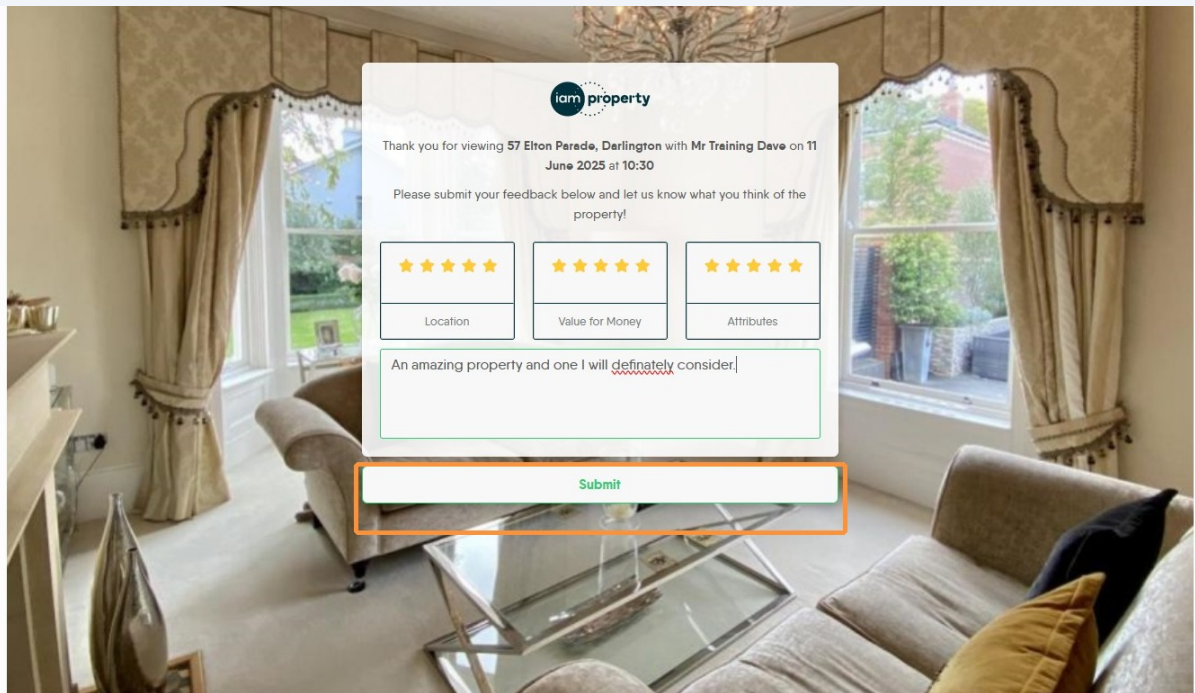




4

Click the "Please enter your feedback here..." field and enter any text feedback. Click "Submit"





Agent Actions

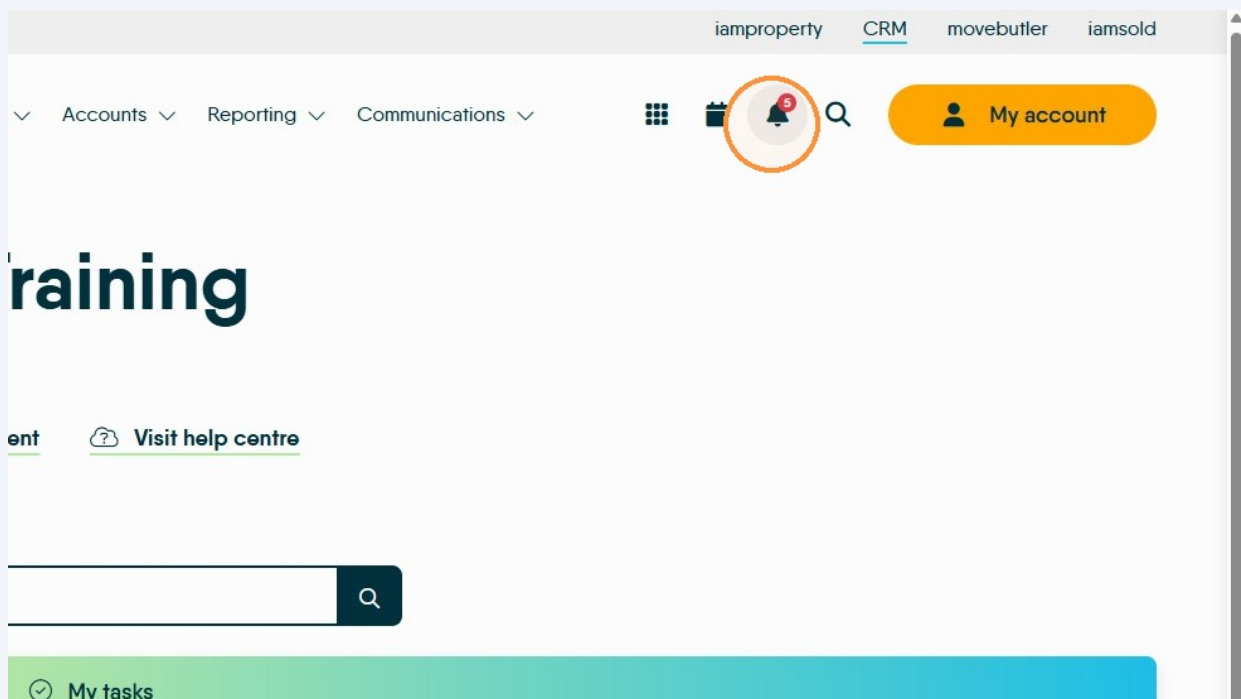
5

How do you as the agent see that feedback has been sent and manage that feedback? There are a number of ways that the feedback can be viewed. These are shown below.

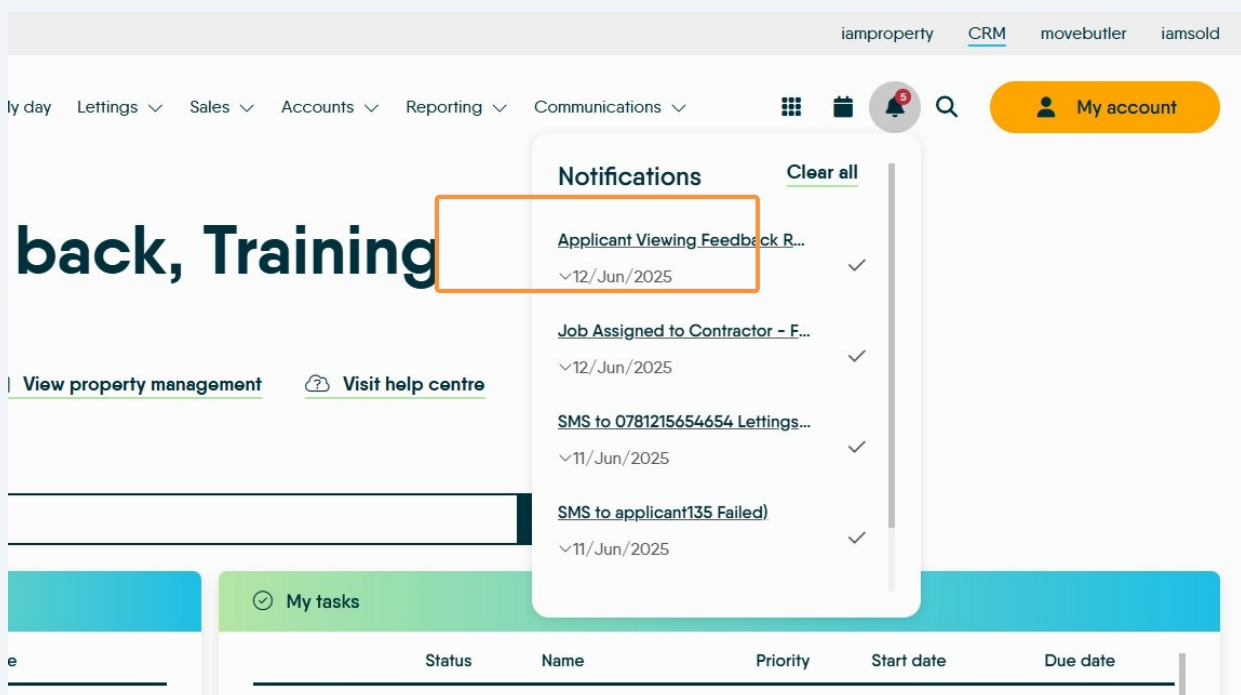
In all cases where the viewer is sent a feedback request message either automated or, pushed out to them manually, the feedback they leave will be 'Private' this creates feedback that only you, the agent can see. If you want feedback to be available to Landlords/Vendors in their portals, copy the feedback to the 'Public' side of the feedback form.

6 There will be a notification in the 'Bell' icon at the top of the screen.

Click **"Notifications"**



7 Click **"Applicant Viewing Feedback Received"**



8

You will then see the viewing feedback received. For example "57 Elton Parade, Darlington Mr Lettings Applicant - 11/06/2025 10:30:00 - An amazing property and one I will definitely consider."

The screenshot shows the iamproperty CRM dashboard. At the top, there's a navigation bar with links for 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A 'My account' button is on the right. The main header says 'Welcome back, Training'. Below this, there are buttons for 'Add New Record', 'View property management', and 'Visit help centre'. A 'Notifications' dropdown is open, showing a message from '57 Elton Parade, Darlington Mr Lettings Applicant' dated '11/06/2025 10:30:00' with the feedback text: 'An amazing property and one I will definitely consider.' Below the notifications, there are sections for 'My tasks' and 'My events'. The 'My tasks' section contains a table with the following data:

Status	Name	Priority	Start date	Due date
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025
Not Started	Make Tea	High	07/Jan/2025	07/Jan/2025

Managing Feedback in the Activity List

9

There are 2 areas in the Activity List that can help manage feedback. **Viewings Requiring Feedback** and **Viewings Applicant Feedback Received**

Viewings Requiring Feedback

10

This section can be used, for example, if the viewer has been called to request feedback or has left feedback in a different way.

11

Feedback can be managed from **Viewings Requiring Feedback** on the Activity list. Click here.

Activity List

- Rent Review 5
- Public Liability 3
- Hmo Licence Expiry 1
- Calls Upcoming/Outstanding 24
- Pb Tenancies Commencing 17
- Viewings Requiring Feedback 4
- Property Visits Due 46
- Tenancy Agreements Expiring 19
- Tasks Today/Overdue 8

Applicant - Offer Questions Sent × Viewings Requiring Feedback ×

Search

	☐ Negotiator	Applicant	Property
⋮	☐ Training Dave	Lettings applicant130	162 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	☐ Training Dave	Lettings Applicant	32 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	☐ Training Dave	Sales applicant28	32 Yew Tree Close, Hurworth, Darlington, DL2 2HX
⋮	☐ Training Dave	Applicant161	7135 Pelaw Crescent, Chester le Street, DH2 2HX

1 to 4 of 4 Page 1 of 1

12

Click "Open Viewing"

Activity List

- Rent Review 5
- Public Liability 3
- Hmo Licence Expiry 1
- Calls Upcoming/Outstanding 24
- Pb Tenancies Commencing 17
- Viewings Requiring Feedback 4
- Property Visits Due 46
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Applicant - Offer Questions Sent × Viewings Requiring Feedback ×

Search

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⋮	☐ Training Dave	Lettings applicant130	162 Yew Tree Close, Hurworth, Darlington, DL2 2HX
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⋮	☐ Training Dave	Applicant161	7135 Pelaw Crescent, Chester le Street, DH2 2HX

1 to 4 of 4 Page 1 of 1

- Add Call (Applicant)
- Log Call (Applicant)
- Add Call (Landlord)
- Log Call (Landlord)
- Open Viewing**
- Send Email to Landlord
- Send SMS to Landlord
- Add Journal (Applicant)
- Add Journal (Property)
- View Property
- View Applicant

13 Click **"Feedback"**

The screenshot shows the 'Edit Viewing' modal with the 'Feedback' tab selected. The 'Details' tab is also visible. The 'Feedback' tab contains a star rating section with five stars, a 'Location' field, a 'Value for Money' field, and an 'Attributes' field. Below these are 'Private Feedback' and 'Public Feedback' sections, each with a text area and a 'Save' button. The 'Public Feedback' section is highlighted with an orange border. At the bottom are 'Cancel' and 'Save Viewing' buttons.

Edit Viewing

Details

Viewing Multiple Properties ☐

Event title
Viewing - 7135 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX

Status
Feedback Received

Viewing Confirmed ☒

Applicant

Select Applicant
Applicant161

+ Add New Applicant

Applicant161
... UK
Mobile: Email: zagg.dave@gmail.com

Add new call Send SMS Send Email

Cancel Save Viewing

14 Click **"Public Feedback"** to add feedback the Landlord or Vendor can see or click **Private feedback** to not display the feedback.

The screenshot shows the 'Edit Viewing' modal with the 'Feedback' tab selected. The 'Details' tab is also visible. The 'Feedback' tab contains a star rating section with five stars, a 'Location' field, a 'Value for Money' field, and an 'Attributes' field. Below these are 'Private Feedback' and 'Public Feedback' sections, each with a text area and a 'Save' button. The 'Public Feedback' section is highlighted with an orange border. At the bottom are 'Cancel' and 'Save Viewing' buttons.

Edit Viewing

Details

Feedback

Email Form To Applicant SMS Form To Applicant

★★★★★

Location Value for Money Attributes

Private Feedback Public Feedback

- Applicant Feedback: lovely house Public Feedback Notes

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

Cancel Save Viewing

- 15 Click **"Save Viewing"** to save the viewing and stay on the screen.

The screenshot shows the 'Edit Viewing' screen with the 'Feedback' tab selected. The screen is divided into two main sections: 'Details' and 'Feedback'. Under 'Details', there are two orange buttons: 'Email Form To Applicant' and 'SMS Form To Applicant'. Below these are three star rating sections for 'Location', 'Value for Money', and 'Attributes', each with five stars. Under 'Feedback', there are two sections: 'Private Feedback' and 'Public Feedback'. The 'Private Feedback' section has a text input field with the placeholder text '- Applicant Feedback: lovely house'. The 'Public Feedback' section has a text input field with the placeholder text 'Public Feedback Notes'. Below these sections are two buttons: 'Save Private Template...' and 'Save Public Template...', each with a lock icon. At the bottom of the screen are three buttons: 'Cancel', 'Save Viewing' (circled in orange), and 'Save Viewing & Close'.

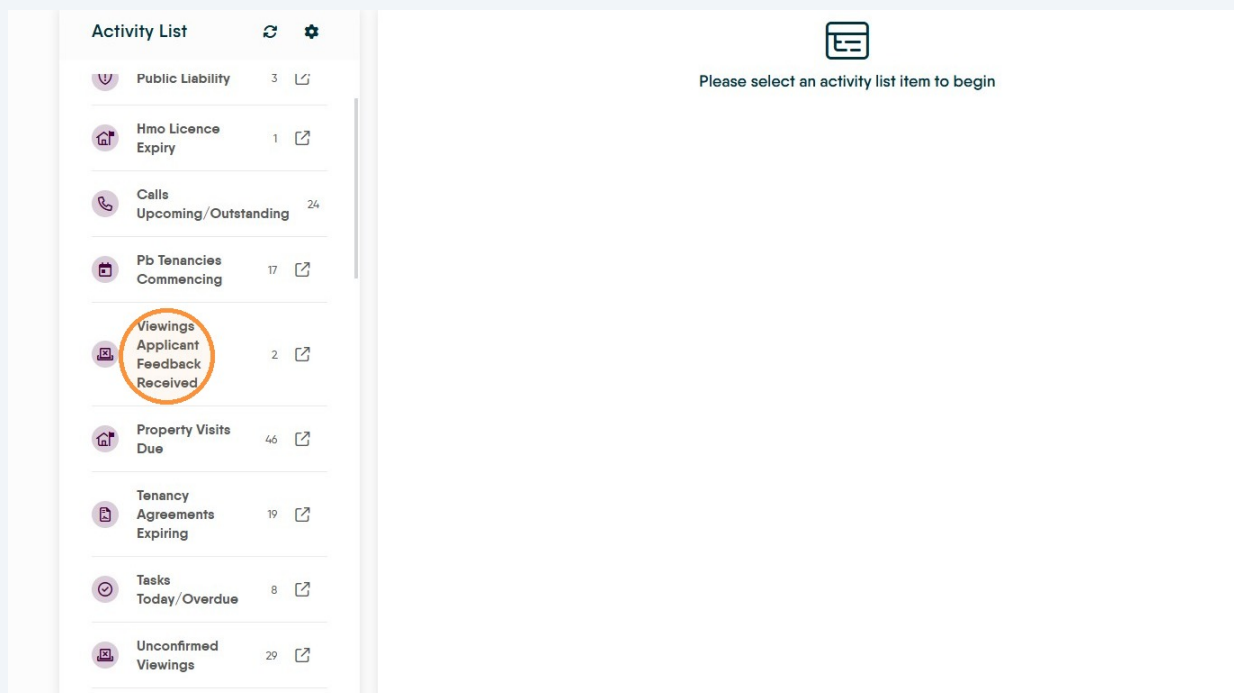
- 16 Click **"Save Viewing & Close"** to close the feedback screen.

The screenshot shows the 'Edit viewing' screen with the 'Feedback' tab selected. The screen is divided into two main sections: 'Viewing' and 'Feedback'. Under 'Viewing', there are two orange buttons: 'Email Form To Applicant' and 'SMS Form To Applicant'. Below these are three star rating sections for 'Location', 'Value for Money', and 'Attributes', each with five stars. Under 'Feedback', there are two sections: 'Private Feedback' and 'Public Feedback'. The 'Private Feedback' section has a text input field with the placeholder text 'Select feedback template' and the text 'nice property'. The 'Public Feedback' section has a text input field with the placeholder text 'Select feedback template' and the text 'nice property'. Below these sections are two buttons: 'Save Private Template...' and 'Save Public Template...', each with a lock icon. At the bottom of the screen are three buttons: 'Cancel', 'Save Viewing', and 'Save Viewing & Close' (circled in orange).

Viewings Applicant Feedback

- 17 This section would be used when the Viewer has responded to the automatically sent (or manually sent) viewing email or SMS.

18 Click **"Viewings Applicant Feedback Received"**



The screenshot displays a software interface with a sidebar on the left titled "Activity List" and a main content area on the right. The sidebar contains a list of activity items, each with an icon, a text label, a count, and a link icon. The item "Viewings Applicant Feedback Received" is highlighted with an orange circle. The main content area is currently empty, displaying a message and a button icon.

Activity List	Count	Link
Public Liability	3	Link
Hmo Licence Expiry	1	Link
Calls Upcoming/Outstanding	24	Link
Pb Tenancies Commencing	17	Link
Viewings Applicant Feedback Received	2	Link
Property Visits Due	46	Link
Tenancy Agreements Expiring	19	Link
Tasks Today/Overdue	8	Link
Unconfirmed Viewings	29	Link

Please select an activity list item to begin

19 To review the feedback, click the 3-dot menu.

The screenshot shows the iamproperty CRM interface. On the left is an 'Activity List' sidebar with items like Public Liability, Hmo Licence Expiry, Calls Upcoming/Outstanding, Pb Tenancies Commencing, Viewings Applicant Feedback Received, Property Visits Due, and Tenancy Agreements Expiring. The main area displays a table titled 'Viewings Applicant Feedback Received'. The table has columns for Negotiator, Feedback Received Date, Applicant, and Property. The first row is circled in orange, and its 3-dot menu is highlighted with an orange circle.

	Negotiator	Feedback Received Date	Applicant	Property
⋮	Training Dave	13/06/2025 11:49	Lettings applicant130	162 Yew Tree Close,
⋮	Training Dave	13/06/2025 11:50	Applicant161	7135 Pelaw Crescen

20 Click "Open Viewing"

The screenshot shows the iamproperty CRM interface. On the left is an 'Activity List' sidebar with items like Public Liability, Hmo Licence Expiry, Calls Upcoming/Outstanding, Pb Tenancies Commencing, Viewings Applicant Feedback Received, Property Visits Due, Tenancy Agreements Expiring, Tasks Today/Overdue, and Unconfirmed Viewings. The main area displays a table titled 'Viewings Applicant Feedback Received'. The 3-dot menu for the first row is open, and the 'Open Viewing' option is circled in orange.

	Negotiator	Feedback Received Date	Applicant	Property
⋮	Training Dave	13/06/2025 11:49	Lettings applicant130	162 Yew Tree Close,
⋮	Training Dave	13/06/2025 11:50	Applicant161	7135 Pelaw Crescen

- Add Call (Applicant)
- Log Call (Applicant)
- Add Call (Landlord)
- Log Call (Landlord)
- Open Viewing**
- Send Email to Landlord
- Send SMS to Landlord
- Add Journal (Applicant)
- Add Journal (Property)
- View Property
- View Applicant

21 Click "Feedback"

The screenshot shows the 'Edit Viewing' form with the 'Details' tab selected. The 'Feedback' tab is circled in orange. The form includes fields for 'Viewing Multiple Properties' (toggle), 'Event title' (text), 'Status' (dropdown), 'Viewing Confirmed' (toggle), 'Select Applicant' (dropdown), and 'Add New Applicant' (button). Below these are contact details for 'Ms Lettings applicant130' and buttons for 'Add new call', 'Send SMS', and 'Send Email'. At the bottom are 'Cancel' and 'Save Viewing' buttons.

22 The feedback left will be in 'Private Feedback', allowing you to edit and move over to the public feedback area.

The screenshot shows the 'Edit Viewing' form with the 'Feedback' tab selected. The 'Feedback' tab is circled in orange. The form includes sections for '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' section is circled in orange, showing a text area with the text: '~ Applicant Feedback: not the property I thought it was too close to farm.' Below this are 'Save Private Template...' and 'Save Public Template...' buttons. At the bottom are 'Cancel' and 'Save Viewing' buttons.

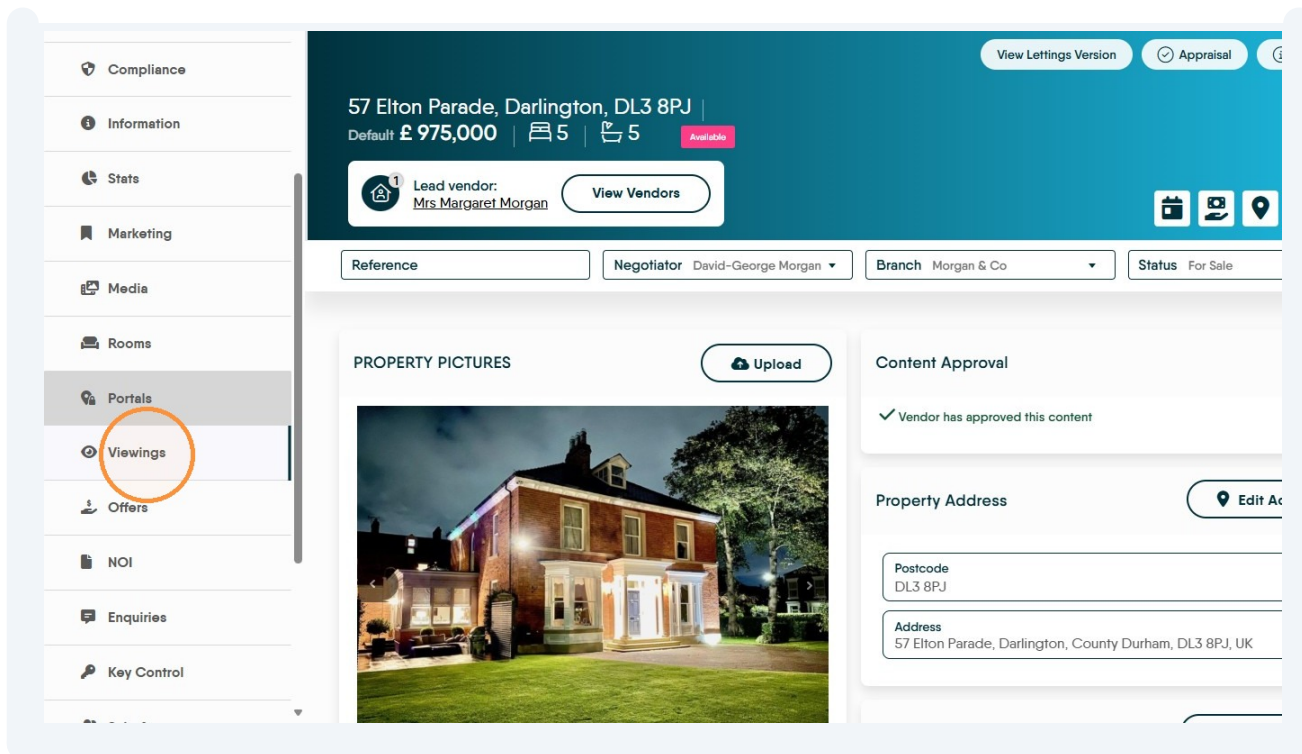
23 Click **"Save Viewing"**

The screenshot shows the 'Edit Viewing' modal form. It has two tabs: 'Details' and 'Feedback'. The 'Feedback' tab is active. At the top, there are two orange buttons: 'Email Form To Applicant' and 'SMS Form To Applicant'. Below these are three star rating sections: 'Location' (5 stars), 'Value for Money' (4 stars), and 'Attributes' (4 stars). There are two text input fields: 'Private Feedback' and 'Public Feedback'. The 'Private Feedback' field contains the text: '- Applicant Feedback: not the property I thought it was too close to farm.' Below these fields are two buttons: 'Save Private Template...' and 'Save Public Template...'. At the bottom, there are two buttons: 'Cancel' and 'Save Viewing'. The 'Save Viewing' button is circled in orange.

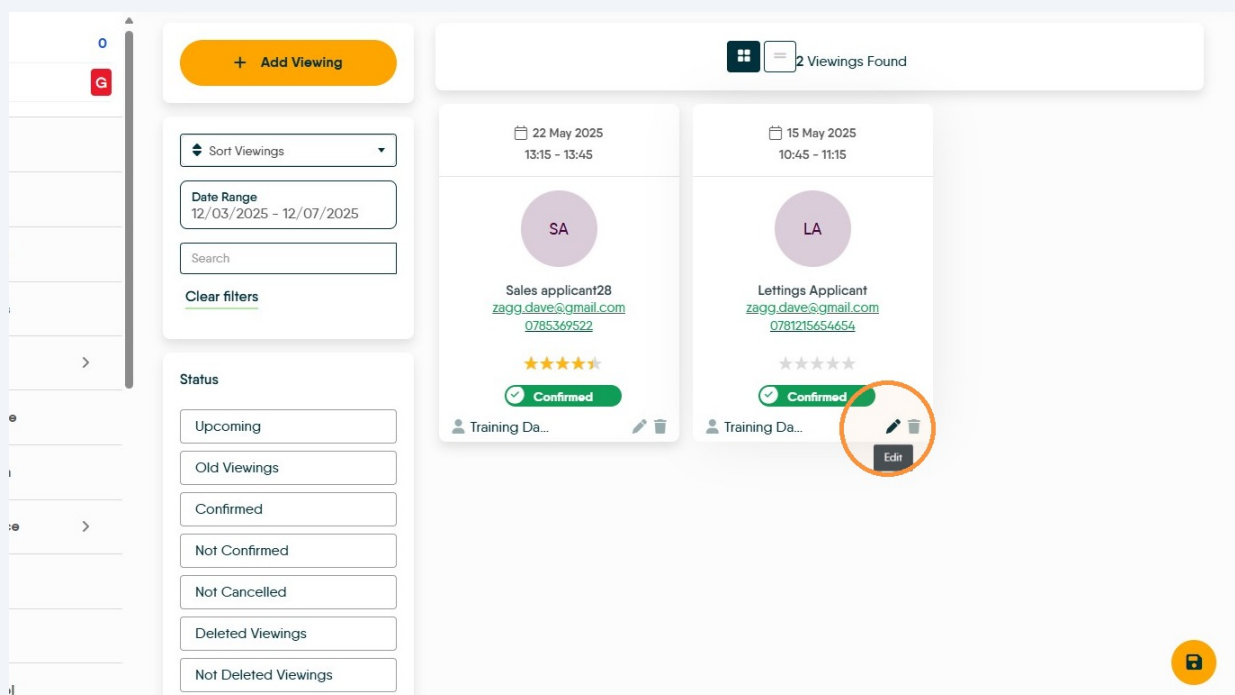
Adding Feedback via the Property Record

24 From the property record. Click **"Viewings"**

The screenshot shows the 'iamproperty' CRM interface. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The left sidebar has a menu with 'Compliance', 'Information', 'Stats', 'Marketing', 'Media', 'Rooms', 'Portals', 'Viewings', 'Offers', and 'NOI'. The main content area displays the property record for '57 Elton Parade, Darlington, DL3 8PJ'. It shows the 'Default' price as '£ 975,000', '5' bedrooms, and '5' bathrooms. The 'Lead vendor' is 'Mrs Margaret Morgan'. Below this, there are fields for 'Reference', 'Negotiator' (David-George Morgan), 'Branch' (Morgan & Co), and 'Status' (For Sale). The 'PROPERTY PICTURES' section shows a photo of the property. The 'Content Approval' section shows a checkmark and the text 'Vendor has approved this content'. The 'Property Address' section shows the address and a 'Postcode' field.



25 Click here.



26 Click "Feedback"

The screenshot shows the 'Edit viewing' form with the 'Feedback' tab selected. The form is divided into sections: Viewing, Details, Applicant, and Property. The 'Feedback' tab is highlighted with an orange circle. The 'Details' section contains fields for 'Event title' (Viewing - 32 Yew Tree Close, Hurworth, Darlington, Durham, DL2 2HX), 'Status' (Booked), and 'Viewing Confirmed' (toggle). The 'Applicant' section shows 'Select Applicant' (Mr Lettings Applicant) and '+ Add New Applicant'. Below this is the applicant's contact information: 'Mr Lettings Applicant', '73 Abbey Road, Darlington, County Durham, DL3 8LT, UK.', and 'Mobile: 0781215654654 Email: zaggy.dave@gmail.com'. There are buttons for 'View applicant', 'Add new call', 'Send SMS', and 'Send Email'. The 'Property' section at the bottom has buttons for 'Cancel', 'Save Viewing', and 'Save Viewing & Close'.

27 To keep your feedback private, use the 'Private Feedback' option, this will mean any feedback left does not show in the Portals. Click the "Public Feedback Notes" field to make feedback available in the portals. Once completed, click "Save Viewing & Close"

The screenshot shows the 'Edit viewing' form with the 'Feedback' tab selected. The form is divided into sections: Viewing, Feedback, and Property. The 'Feedback' tab is highlighted with an orange circle. The 'Feedback' section contains two columns: 'Private Feedback' and 'Public Feedback'. Each column has a 'Select feedback template' dropdown, a 'Notes' text area, and a 'Save [Private/Public] Template...' button. The 'Public Feedback Notes' field is highlighted with an orange circle. There are also buttons for 'Email Form To Applicant' and 'SMS Form To Applicant'. The 'Property' section at the bottom has buttons for 'Cancel', 'Save Viewing', and 'Save Viewing & Close'.

Edit viewing [X]

Viewing Feedback

Email Form To Applicant SMS Form To Applicant

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

Private Feedback Select feedback template

Private Feedback Notes

Save Private Template...

Public Feedback Select feedback template

public feedback goes here

Save Public Template...

Cancel Save Viewing **Save Viewing & Close**

28

If you have completed adding the feedback then in the **"Would you like to mark this viewing as Feedback Received?"** field click "yes mark it", otherwise click no and this will allow you to revisit the feedback and add more.

Edit viewing [X]

Viewing Feedback

Details

Event title
Viewing - 32 Yew Tree

Status
Booked

Select Applicant
Mr Lettings Applicant

Mr Lettings Applicant
73 Abbey Road, Darlington, County Durham, DL3 8LI, UK.
Mobile: 0781215654654 Email: zaggy.dave@gmail.com

View applicant Add new call Send SMS Send Email

Property

Cancel Save Viewing **Save Viewing & Close**

?

Feedback Received?

Would you like to mark this viewing as Feedback Received?

No **Yes, mark it!**

29 Feedback left will also show in the property journal.

57 Elton Parade, Darlington, DL3 8PJ |
Default £ 975,000 | 5 | 5 Available

Lead vendor: Mrs Margaret Morgan View Vendors

Reference Negotiator David-George Morgan Branch Morgan & Co Status For Sale

+ New Journal

Sort Journal
Start 12/03/2025 End 12/06/2025
Search
Clear filters

2 Journals Found

TD
Training Dave
12/06/2025 11:50:41
Feedback

Property - 57 Elton Parac

Applicant Viewing Feedback Received - An amazing property and one I will definitely consider.

TD
Training Dave
09/04/2025 20:55:11
Task

Property - 57 Elton Parade

Reviewing all Feedback Left

30 Click into the "Viewings" tab and you will see all the current viewings with a marker showing if feedback has been received.

iamproperty CRM movebutler iamsold

property My day Lettings Sales Accounts Reporting Communications My account

+ Add Viewing

Sort Viewings
Date Range 30/06/2026 - 30/10/2026
Search
Clear filters

Status
Upcoming
Old Viewings
Confirmed
Not Confirmed
Not Cancelled

2 Viewings Found

30 Sep 2026 15:30 - 16:00

Feedback Received

LA

lettings Applicant demo
zagg.dave@gmail.com

★★★★★

Confirmed

Training Da...

30 Sep 2026 15:30 - 16:00

Feedback Received

LA

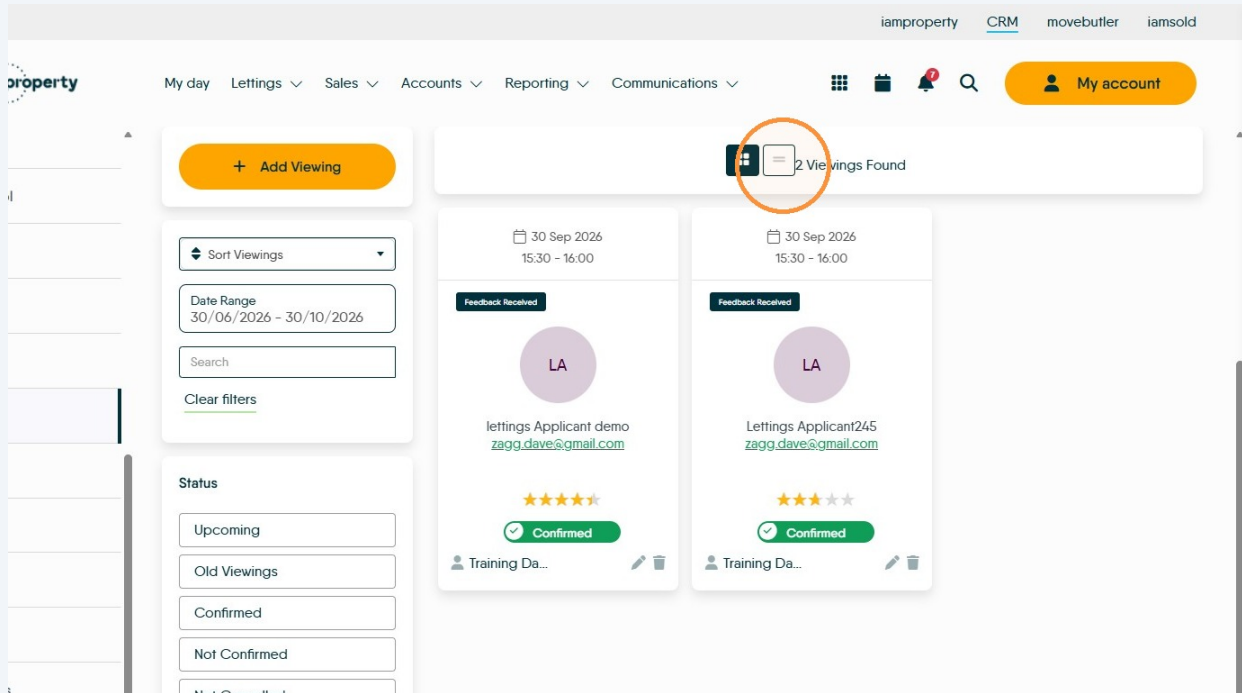
Lettings Applicant245
zagg.dave@gmail.com

★★★★★

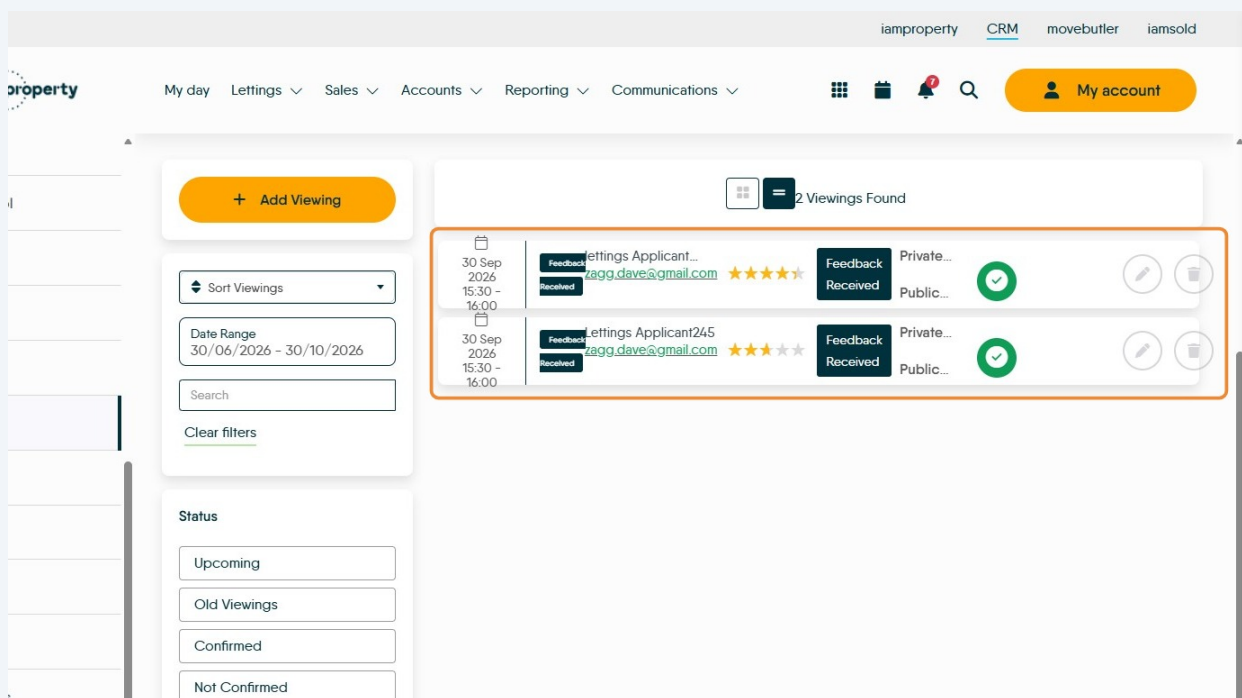
Confirmed

Training Da...

31 There is an alternate view. Click this icon to view the feedback in a list format.



32 The viewings will show in a list format (as shown) to view the feedback, hover your mouse over the 'Private' or 'Public' options to review the feedback text.



30 Sep 2026
15:30 - 16:00

Feedback Received

Lettings Applicant...
zagg.dave@gmail.com

★★★★★

Feedback Received

Private...
Public...

✓

30 Sep 2026
15:30 - 16:00

Feedback Received

Lettings Applicant245
zagg.dave@gmail.com

★★★★★

Feedback Received

Private...
Public...

✓

dont like this phouse