

Adding a Newsfeed Item in CRM



This guide provides a straightforward process for adding news items to your CRM, ensuring you can keep relevant stakeholders informed and engaged. These are shown to Client Portal users, e.g. Landlords, Tenants etc.

By following these steps, users can easily enhance communication within their organisation and streamline updates for landlords, vendors, and other key contacts.

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

The screenshot shows the CRM MyDay dashboard. At the top, there is a navigation bar with the iam property logo, menu items (My day, Lettings, Sales, Accounts, Reporting, Communications), and utility icons (grid, calendar, notifications, search, and My account). Below the navigation bar, a large heading reads "Welcome back, Training". Underneath, there are three buttons: "+ Add New Record" (orange), "View Property Management" (blue), and "Visit Help Centre" (blue). A search bar labeled "Search all records" is positioned below the buttons. The dashboard is divided into two main panels. The left panel, titled "Today's events", contains a table with two entries: "12:00 Test test" and "16:30 Viewing - 1 Park View Road, Witney, Oxfordshire, OX28 1GA". The right panel, titled "My tasks", contains a table with four tasks:

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024
Not Started	Call back	High	03/Jan/2025	03/Jan/2025

2 Click "My Account"

The screenshot shows the 'My account' page in a CRM system. The navigation bar at the top includes 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. The main navigation menu has 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'My account' button is highlighted in orange. The page content includes a 'Welcome back, Training' message, a 'Add New Record' button, and links for 'View Property Management' and 'Visit Help Centre'. Below this is a search bar for records. The 'My tasks' section is highlighted in green and contains a table with the following data:

Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

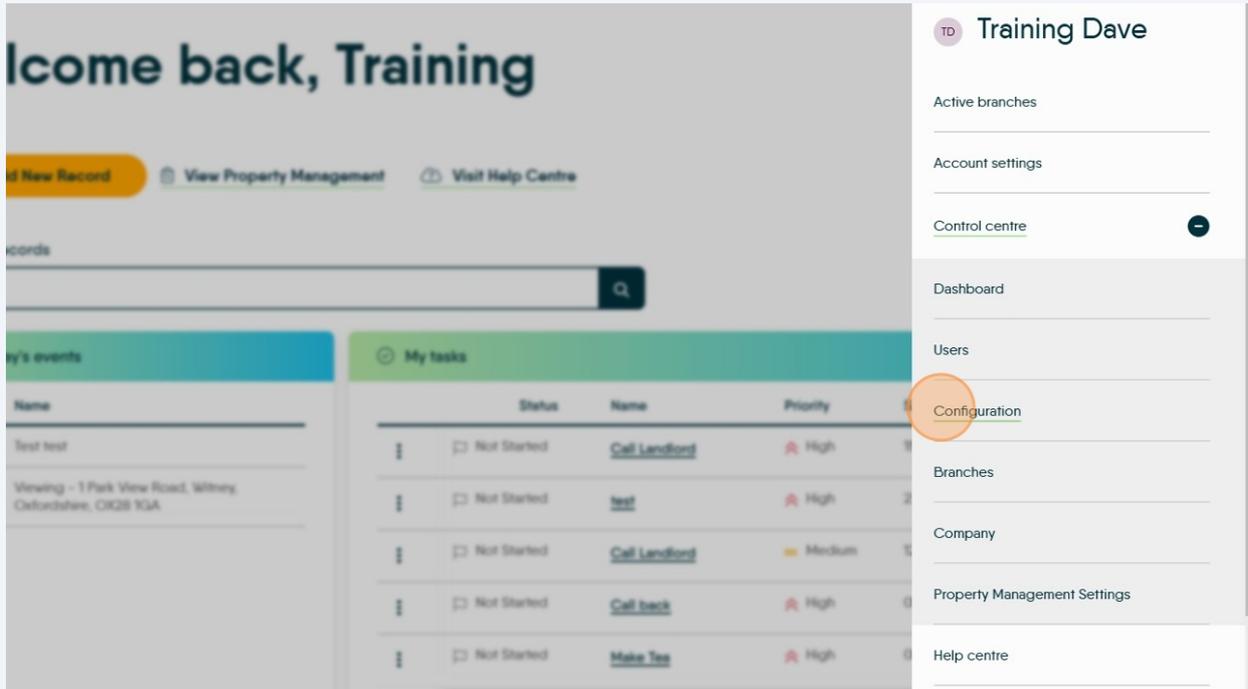
3 Click "Control centre"

The screenshot shows the 'Control centre' page in a CRM system. The navigation bar at the top includes 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. The main navigation menu has 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'My account' button is highlighted in orange. The page content includes a 'Welcome back, Training' message, a 'Add New Record' button, and links for 'View Property Management' and 'Visit Help Centre'. Below this is a search bar for records. The 'My tasks' section is highlighted in green and contains a table with the following data:

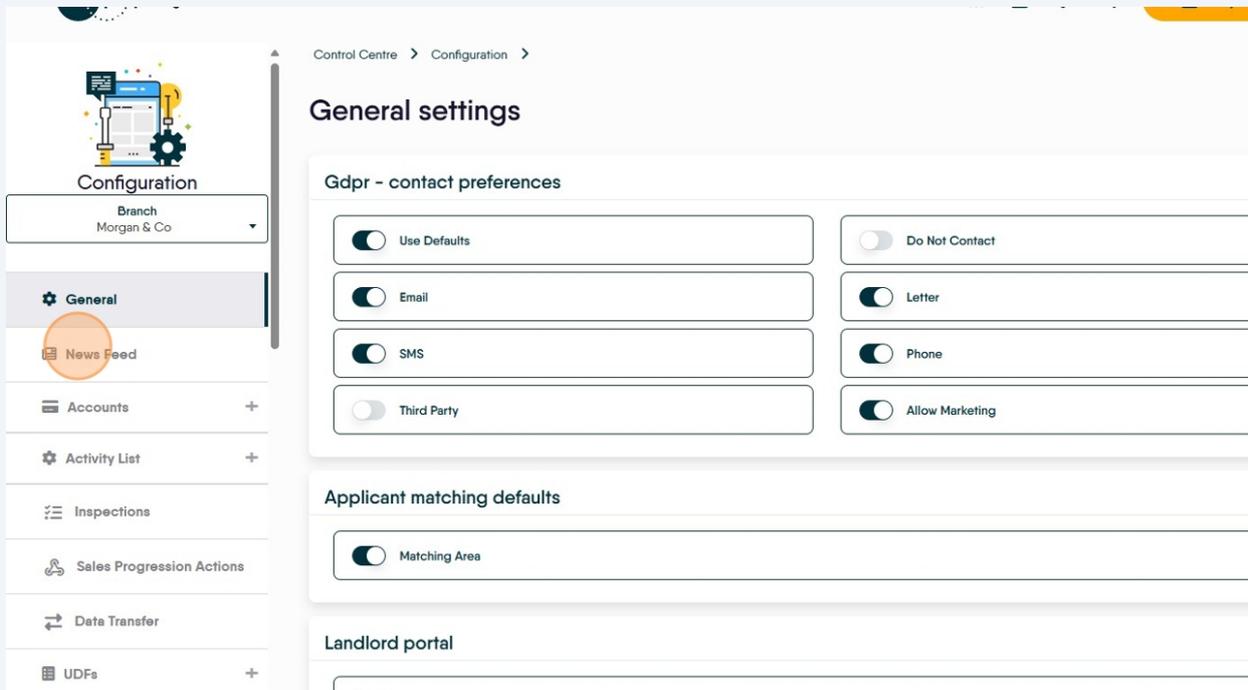
Status	Name	Priority	Start date	Due date
Not Started	Call Landlord	High	15/Nov/2024	15/Nov/2024
Not Started	test	High	27/Nov/2024	27/Nov/2024
Not Started	Call Landlord	Medium	12/Dec/2024	12/Dec/2024

The 'Control centre' button is highlighted in orange in the account settings menu.

4 Click "Configuration"



5 Click "News feed"



6 Click "Add News Item"

The screenshot shows the 'Control Centre' interface with the 'Configuration' menu open. The 'News feed' section is active, displaying a list of news items. A red circle highlights the 'Add News Item' button. The news items listed are:

- Latest house prices report - oxford** 20/06/2023
- Renters (reform) bill 'a golden opportunity to improve standards in the prs'** 20/06/2023
- How to rent - gov.uk** 20/06/2023

The 'Add News Item' button is located at the top left of the news feed area. A 'Publish' button is located at the top right. A red notification message states: '* There are unpublished changes'.

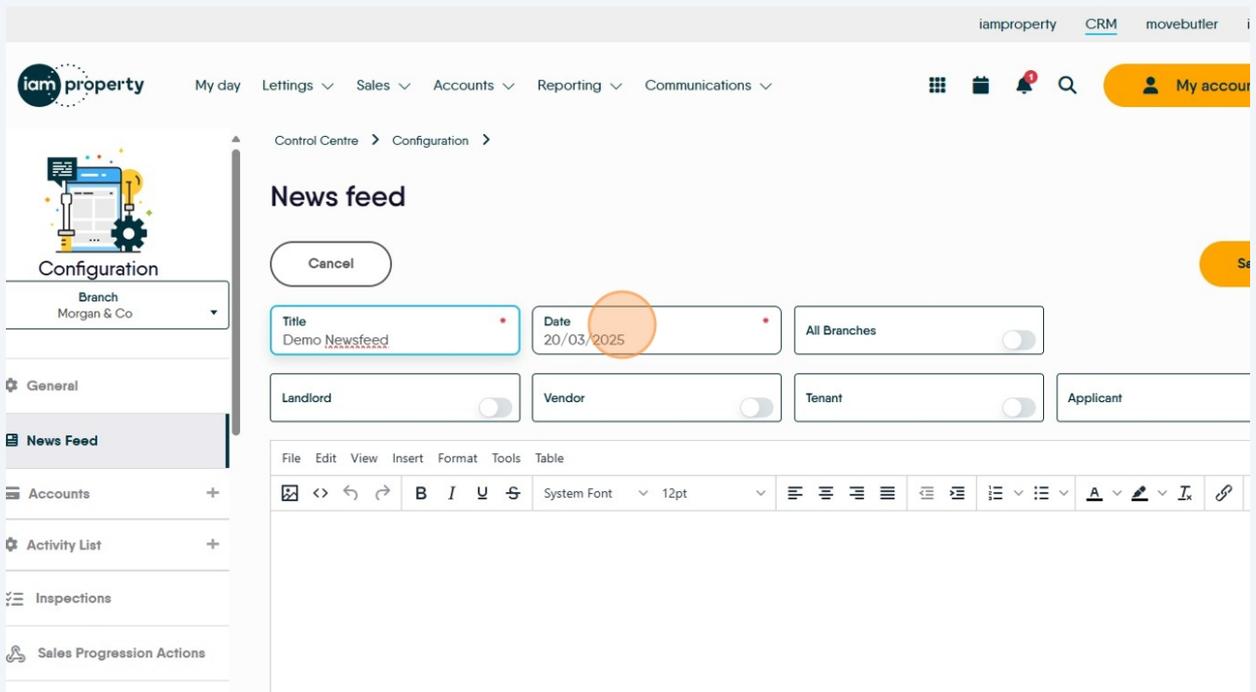
7 Click the "Title" field. Give your news item a title.

The screenshot shows the 'Control Centre' interface with the 'Configuration' menu open. The 'News feed' section is active, displaying a form to add a new news item. A red circle highlights the 'Title' field. The form fields are:

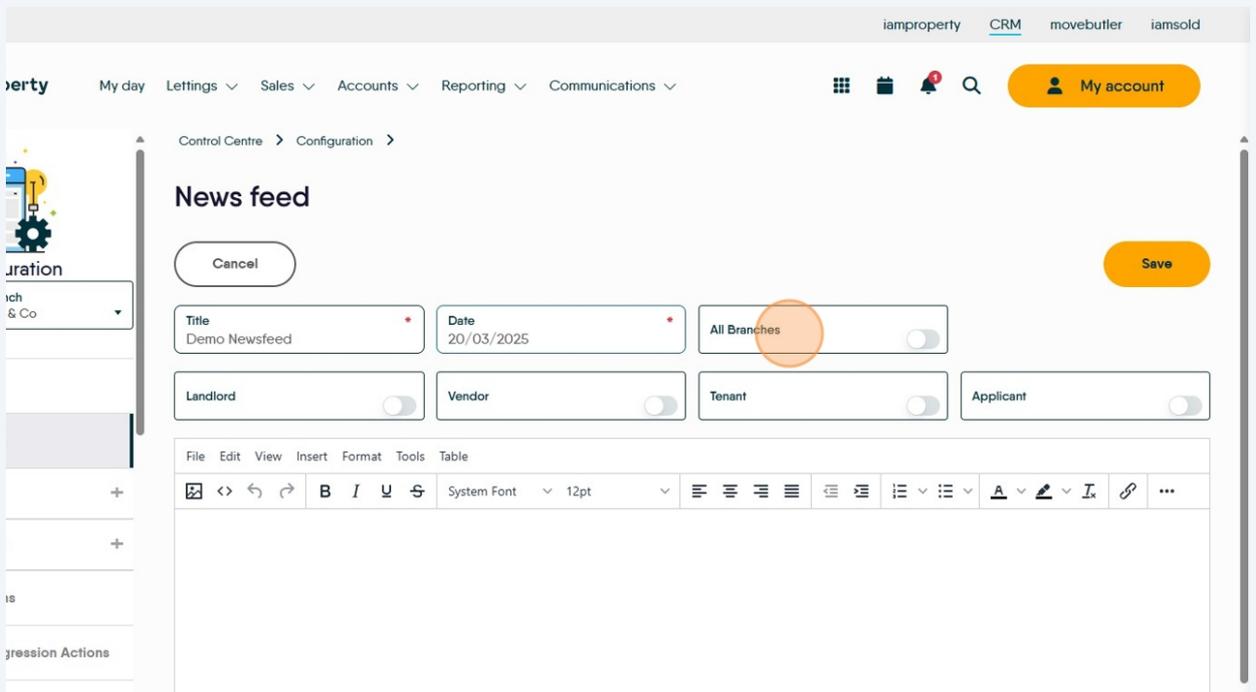
- Title**: Enter title *
- Date**: 20/03/2025 *
- All Branches**:
- Landlord**:
- Vendor**:
- Tenant**:
- Applicant**:

The 'Title' field is located at the top left of the form. A 'Cancel' button is located at the top left of the form. A red notification message states: '* There are unpublished changes'.

8 Click the "Date" field.



9 Click here and set whether the News is for all branches or just yours.



10 Click to set who the news feed is for "Landlord", "Vendor" etc

The screenshot shows the 'News feed' configuration page in the 'iam property' system. The page is titled 'Control Centre > Configuration > News feed'. On the left, there is a sidebar with a 'Configuration' section containing a 'Branch' dropdown set to 'Morgan & Co'. Below this are several menu items: 'General', 'News Feed' (highlighted), 'Accounts', 'Activity List', 'Inspections', 'Sales Progression Actions', and 'Data Transfer'. The main content area features a 'Cancel' button at the top left. Below it are several input fields: 'Title' (Demo Newsfeed), 'Date' (20/03/2025), and 'All Branches' (toggle). A second row contains 'Landlord' (toggle), 'Vendor' (toggle, highlighted with an orange circle), 'Tenant' (toggle), and 'Applicant'. Below these fields is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and various formatting options. The 'Vendor' field is highlighted with an orange circle, indicating the step to click on it to set the news feed recipients.

This screenshot is identical to the one above, showing the 'News feed' configuration page. The 'Vendor' field is highlighted with an orange circle, indicating the step to click on it to set the news feed recipients.

News feed

Cancel

Save

Title Demo Newsfeed

Date 20/03/2025

All Branches

Landlord

Vendor

Tenant

Applicant

File Edit View Insert Format Tools Table

System Font 12pt

Rich text editor toolbar with icons for bold, italic, underline, link, list, and text color.

News feed

Cancel

Save

Title Demo Newsfeed

Date 20/03/2025

All Branches

Landlord

Vendor

Tenant

Applicant

File Edit View Insert Format Tools Table

System Font 12pt

Rich text editor toolbar with icons for bold, italic, underline, link, list, and text color.

11 Click here and add the text for your News item..

The screenshot shows the 'Configuration' page for a 'News Feed' item in the iamproperty CRM. The left sidebar contains a 'Configuration' menu with options: Branch (Morgan & Co), General, News Feed (selected), Accounts, Activity List, Inspections, Sales Progression Actions, and Data Transfer. The main content area has a form with the following fields: Title (Demo Newsfeed), Date (20/03/2025), All Branches (toggle), Landlord (toggle), Vendor (toggle), Tenant (toggle), and Applicant (text field). Below the form is a rich text editor with a menu bar (File, Edit, View, Insert, Format, Tools, Table) and a toolbar with icons for undo, redo, bold, italic, underline, link, bulleted list, numbered list, indent, outdent, text color, background color, and link. The editor content is currently blank, with a large orange circle highlighting the text area.

12 Click "Save"

The screenshot shows the 'News feed' configuration page in the iamproperty CRM. The left sidebar is the same as in the previous screenshot. The main content area has a 'News feed' title and a 'Cancel' button. The form fields are the same as in the previous screenshot. The rich text editor now contains text: 'This guide will show how to create anew feed in iampropertyCRM. A Newsfeed will show in any portal, (All Branches, Landlord, Vendor, Tenant and Applicant) that is enabled and can display any information required.' followed by a 'Getting started' section with instructions: 'To create a new News Feed in iampropertyCRM. From the iampropertyCRM Control Centre, click on the 'Configuration' tile. To find 'Control Centre', click on the 'My Account' then from the drop-down list select 'Control Centre' then'. A large orange circle highlights the 'Save' button in the top right corner of the form area.

13

Click here to publish the news-feed. It does not need to be published immediately can be created, saved and sent later.

