

# Changing the Advertising Status of Properties in CRM



This guide provides a straightforward process for accessing under offer properties within the CRM system, enabling users to efficiently manage and track property statuses.

By following the outlined steps, users can quickly navigate to relevant listings, enhancing their ability to stay informed and make strategic decisions in the real estate market. Accessing this information can improve communication with clients and streamline workflow.



This process is the same for Sales and Lettings properties. This guide will show the final steps for both lettings and sales to help with clarity.

Once the Advertising Status is set on the property, to update the status on the Portals (Rightmove, Zoopla etc) perform a portal upload for that specific property from the Portals menu in the property record, or bulk upload.

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

The screenshot shows the 'MyDay' dashboard in the iamproperty CRM. The top navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar and a 'My account' button are also present. The main heading is 'Welcome back, Training'. Below this are three buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar for 'Search all records' is located below the buttons. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a table with columns 'Time' and 'Name', containing one entry: '12:00' and 'Test test'. The 'My tasks' section shows a table with columns 'Status', 'Name', 'Priority', 'Start date', and 'Due date', containing five entries: 'Contact Landlord re renewal', 'Call back', 'Make Tea', 'Clean Windows', and 'making tea'. All tasks are marked as 'Not Started' and 'High' priority.

| Time  | Name      |
|-------|-----------|
| 12:00 | Test test |

| Status      | Name                        | Priority | Start date  | Due date    |
|-------------|-----------------------------|----------|-------------|-------------|
| Not Started | Contact Landlord re renewal | High     | 12/Jun/2025 | 14/Jun/2025 |
| Not Started | Call back                   | High     | 03/Jan/2025 | 03/Jan/2025 |
| Not Started | Make Tea                    | High     | 07/Jan/2025 | 07/Jan/2025 |
| Not Started | Clean Windows               | High     | 28/Jan/2025 | 28/Jan/2025 |
| Not Started | making tea                  | High     | 04/Feb/2025 | 04/Feb/2025 |

Click "Search" type your search into the search screen.



### 3 Click "View Property"

The dashboard displays a grid of property listings. The listing for '162 Yew Tree Close, Hurworth, DL2 2HX' is highlighted, showing details such as 'Lettings', 'Short Term', '2 Tenants', and a price of '£1200.00 pcm'. The 'View Property' button is circled in orange.

## Lettings Property

### 4 Click "Marketing"

The 'Marketing' page displays property details for '162 Yew Tree Close, Hurworth, DL2 2HX'. The 'Marketing' button in the left sidebar is highlighted with an orange circle. The main content area shows a large photo of the property and a table of fees.

| Property Information                                                                             |                                                                                   |
|--------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> <b>Fully managed</b><br>This property is fully managed by us | <input type="checkbox"/> <b>Rent collect</b><br>We collect rent for this property |
| <input type="checkbox"/> <b>Let only</b><br>We only let property                                 |                                                                                   |
| Management Fee<br>10                                                                             | £                                                                                 |
| Upfront Letting Fee<br>£ 500                                                                     | £                                                                                 |
| Regular Letting Fee<br>£ 0                                                                       | £                                                                                 |
| Authorised Expense Amount<br>£ 200.00                                                            | Estimated Rental Value<br>£ 1,010.00                                              |
| Agreement Name<br>Mr Alfie Martin                                                                |                                                                                   |

**Scheduled Management Fee** ⓘ

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In Advertising Status, from the drop down menu select the option you want to use. In this case 'Under Offer'

**Property Advertising**

|                                                                                 |                                                                   |                                                           |
|---------------------------------------------------------------------------------|-------------------------------------------------------------------|-----------------------------------------------------------|
| <b>Advertise ?</b><br>Check this if this Property is Available for Advertising. | <b>New build ?</b><br>Check this if this Property is a new Build. | Select Date Available From <b>14/06/2023</b> <b>Today</b> |
| <b>Advertising Address</b><br>Yew Tree Close, Hurworth, Darlington, Dur         |                                                                   | <b>Advertising Status</b><br>Under Offer                  |
| <b>Advertising Url</b>                                                          | <b>Virtual Tour Url 1</b>                                         | <b>Virtual Tour Url 2</b>                                 |
| <b>Pets ?</b><br>Check this if this Property accepts Pets.                      | <b>Smokers ?</b><br>Check this if this Property accepts Smokers.  | <b>Premium Listing</b><br>Please select a premium listing |
| <b>Tenancy Info</b>                                                             |                                                                   |                                                           |

**Matching Property**

|              |                    |                  |
|--------------|--------------------|------------------|
| Lease Period | Min Lease Months * | Max Lease Months |
|--------------|--------------------|------------------|

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Click here to save the 'Advertising Status'

|                   |                                                                  |                                          |                                                           |
|-------------------|------------------------------------------------------------------|------------------------------------------|-----------------------------------------------------------|
| , Darlington, Dur |                                                                  | <b>Advertising Status</b><br>Under Offer | <b>Advertising Url</b>                                    |
|                   |                                                                  | <b>Virtual Tour Url 2</b>                | <b>Premium Listing</b><br>Please select a premium listing |
|                   | <b>Smokers ?</b><br>Check this if this Property accepts Smokers. | <b>Tenancy Info</b>                      |                                                           |

|                       |                        |
|-----------------------|------------------------|
| Min Lease Months<br>6 | Max Lease Months<br>12 |
|-----------------------|------------------------|

|                                         |                     |
|-----------------------------------------|---------------------|
| <b>Property Type Zoopla</b><br>Detached | <b>Save Changes</b> |
| <b>Property Age</b>                     |                     |

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Once the screen is refreshed, the Advertising Status will show at the top of the screen.

The screenshot displays a property listing for 162 Yew Tree Close, Hurworth, Darlington, DL2 2HX. The listing includes a price of GBP 1200.00 pcm and is marked as 'Under Offer' with '2 Tenants'. The lead landlord is Mr Alfie Martin, and the lead tenant is Lettings Applicant86. The interface also shows a sidebar with a search bar and a list of properties, and a bottom section titled 'Property Marketing' with filters for Rent (GBP), Deposit (GBP), Bedrooms, and Bathrooms.

View Sales Versi

162 Yew Tree Close, Hurworth, Darlington, DL2 2HX |

4 3 | GBP 1200.00 pcm

Under Offer 2 Tenants

Lead landlord: Mr Alfie Martin View Landlords

Lead tenant: Lettings Applicant86 View Tenants

Reference: Negotiator: Training Dave Branch: Morgan & Co

Property Marketing

Rent (GBP) Deposit (GBP) Bedrooms Bathrooms

## Sales Property

## 8 From the property record, select 'Marketing'

The screenshot shows a property record interface. On the left is a sidebar with a list of tabs: 3 Viewings, 0 Offers, Details, Checklist, Appraisals, Compliance, Information, Stats, Marketing (highlighted with an orange circle), Media, Rooms, Portals, and Viewings. The main content area has a header for '162 Yew Tree Close, Hurworth, Darlington, DL2 2HX | £0 | 4 | 3'. Below this is a 'Lead vendor: Mr Alfie Martin' section with a 'View Vendors' button. A navigation bar contains 'Reference', 'Negotiator Training Dave', 'Branch Morgan & Co', and 'Status'. The 'Prices and Matching' section includes a 'Prefix' dropdown set to 'Default', a 'Price (GBP)' field set to '0', and fields for 'Bedrooms' (4), 'Bathrooms' (3), and 'Reception' (2). The 'Property Advertising' section at the bottom includes a 'Board Status' dropdown set to 'No Board' and an 'Advertising Address' field with the value 'Yew Tree Close, Hurworth,'.

## 9 Click on 'Advertising Status' and from the drop down menu select the option you want to use. In this case 'Available'

This screenshot shows the 'Property Advertising' section of the interface. It includes a 'Default' dropdown, a 'Price' field set to '0', and fields for 'Bedrooms' (4), 'Bathrooms' (3), and 'Reception' (2). The 'Property Advertising' section contains several fields: 'Advertise?' (with a checkmark), 'New build?' (with a checkmark), 'Board Status' (set to 'No Board'), 'Advertising Address' (set to 'Yew Tree Close, Hurworth, D'), 'Advertising Status' (set to 'Available' and highlighted with an orange circle), and 'Advertising Url'. Below these are 'Virtual Tour Url 1' and 'Virtual Tour Url 2' fields, and a 'Premium Listing' dropdown set to 'Please select a premium listing'. The 'Matching Property' section at the bottom includes 'Property Type' (set to 'Detached House'), 'Property Type Zoopla' (set to 'Detached'), 'Property Attributes', 'Property Age', and 'Period'.



10 Click here to save the new 'Advertising Status'.

**Property Advertising**

Advertise ?  
Check this if this Property is Available for Advertising.

New build ?  
Check this if this Property is a new Build.

Board Status  
No Board

Advertising Address  
Yew Tree Close, Hurworth, D

Advertising Status  
Available

Advertising Url

Virtual Tour Url 1

Virtual Tour Url 2

Premium Listing  
Please select a premium listing

**Matching Property**

Property Type  
Detached House

Property Type Zoopla  
Detached

Property Attributes

Property Age

Period

Pre-war

Post-war

Modern

Save Changes

11 Once refreshed the advertising status will show at the top of the screen.

**iam property**

My day Lettings Sales Accounts Reporting Communications

View Lettings Version Appraisal WARNING

162 Yew Tree Close, Hurworth, Darlington, DL2 2HX |  
Offers In Excess Of £ 352,000 | 4 | 3 Available

Lead vendor: Mr Alfie Martin View Vendors

Reference Negotiator Training Dave Branch Morgan & Co Status

**Prices and Matching**

Currency GBP

Prefix  
Offers In Excess Of

Price (GBP)  
£  
352,000

Bedrooms  
4

Bathrooms  
3

Receptions  
2

**Property Advertising**