

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 'My account' button are on the right. The main heading is 'Welcome back, Training'. Below it are buttons for 'Add New Record', 'View property management', and 'Visit help centre'. A search bar for 'Search all records' is present. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'.

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 cards. The card for '162 Yew Tree Close, Hurworth, DL2 2HX' is highlighted, showing details such as 'Lettings', 'Short Term', '2 Tenants', and a 'View Property' button circled in orange. Other cards show tenant and vendor information with 'View Tenant' and 'View Vendor' buttons respectively.

Lettings Property

4 Click "Marketing"

The 'Marketing' page provides detailed information for a property. The left sidebar contains navigation options, with 'Marketing' highlighted. The main content area includes a large property photo, a list of features (Fully managed, Rent collect, Let only), and a table of fees. The 'COMMERCIAL' section shows options for VAT treatment (Exempt, Inclusive, Exclusive).

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

Scheduled Management Fee ⓘ

5

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

Property Advertising

<p>Advertise ? Check this if this Property is Available for Advertising.</p>	<p>New build ? Check this if this Property is a new Build.</p>	<p>Select Date Available From 14/06/2023 Today</p>
<p>Advertising Address Yew Tree Close, Hurworth, Darlington, Dur</p>	<p>Advertising Status Under Offer</p>	<p>Board Status No Board</p>
<p>Advertising Url</p>	<p>Let Type Short Term</p>	
<p>Virtual Tour Url 1</p>	<p>Virtual Tour Url 2</p>	<p>Premium Listing Please select a premium listing</p>
<p> Pets ? Check this if this Property accepts Pets.</p>	<p> Smokers ? Check this if this Property accepts Smokers.</p>	<p>Tenancy Info</p>

Matching Property

Lease Period	Min Lease Months	Max Lease Months
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6

Click here to save the 'Advertising Status'

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

	<p>Min Lease Months 6</p>	<p>Max Lease Months 12</p>
	<p>Property Type Zoopla Detached</p>	
	<p>Property Age</p>	

Save Changes

7

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

The screenshot displays a property listing interface. At the top, the address "162 Yew Tree Close, Hurworth, Darlington, DL2 2HX" is shown. Below the address, the price "GBP 1200.00 pcm" is displayed. A green button labeled "Under Offer" and a white button labeled "2 Tenants" are highlighted with an orange box. Below these buttons, the "Lead landlord" is listed as "Mr Alfie Martin" with a "View Landlords" button, and the "Lead tenant" is listed as "Lettings Applicant86" with a "View Tenants" button. Below the landlord and tenant information, there are three dropdown menus: "Reference:", "Negotiator: Training Dave", and "Branch: Morgan & Co". Below the dropdown menus, the "Property Marketing" section is visible, showing four cards: "Rent (GBP)" with a pound symbol, "Deposit (GBP)" with a camera icon, "Bedrooms" with a bed icon, and "Bathrooms" with a bathtub icon.

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' with details like '£0', '4' bedrooms, and '3' bathrooms. 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 fields for Prefix (Default), Price (GBP) (0), Bedrooms (4), Bathrooms (3), and Reception (2). The 'Property Advertising' section at the bottom contains fields for Board Status (No Board), Advertising Address (Yew Tree Close, Hurworth), and a 'Virtual Tour Url' field.

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 checkboxes for 'Advertise?' and 'New build?'. The 'Board Status' is set to 'No Board'. The 'Advertising Status' dropdown menu is open, with 'Available' selected and highlighted by an orange circle. Other fields include 'Advertising Address' (Yew Tree Close, Hurworth, D), 'Advertising Url', 'Virtual Tour Url 1', 'Virtual Tour Url 2', and 'Premium Listing'. Below this is the 'Matching Property' section, which contains fields for 'Property Type' (Detached House), 'Property Type Zoopla' (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

My account

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

Price (GBP)

£

352,000

Bedrooms

4

Bathrooms

3

Receptions

2

Property Advertising