

# 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>

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

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

My day Lettings Sales Accounts Reporting Communications

Search My account

# Income back, Training

New Record View property management Visit help centre

Records

My events

Name
Test test

My tasks

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

Archived in results

Mrs lettings Applicant30 zagg.dave@gmail.com null 1ree Close, Hurworth, DL2 2HX Darlington, Durham Starts: 20/02/2025 Ends: 19/02/2026 Next payment due: 20/02/2025 View Tenant	Ms lettings Applicant137 zagg.dave@gmail.com 6456215456 17 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham Starts: 26/02/2025 Ends: 25/02/2026 Next payment due: 26/02/2025 View Tenant	additional tenant zagg.dave@gmail.com 345 5 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham View Tenancy	Dick Blyton DM zagg.dave@gmail.com 07852463558 17 Yew Tree Close, Hurworth, DL2 2HX Darlington, Durham View Tenancy
		Lettings Short Term 2 Tenants	
162 Yew Tree Close, Hurworth, DL2 2HX		Applicant141	

### 3 Click "View Property"

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

£1200.00 pcm

Beds: 4 Bathrooms: 3 Receptions: 2

Training Dave 22/05/2025

**View Property**

## Lettings Property

### 4 Click "Marketing"

Live Jobs 0

EPC Rating B

**Marketing**

Details

Checklist

Appraisals

Inspections

Accounts >

Compliance

Information

maintenance >

Payment

**Marketing**

Key Control

POSTCODE  
DL2 2HX

**Property Information**

**Fully managed**  
This property is fully managed by us

**Rent collect**  
We collect rent for this property

**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

0 3

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

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

Select Date Available From 14/06/2023 Today

Board Status No Board Let Type Short Term

Advertising Address Yew Tree Close, Hurworth, Darlington, Dur Advertising Status Under Offer

Virtual Tour Url 1 Virtual Tour Url 2 Advertising Url

Pets ? Check this if this Property accepts Pets.

Smokers ? Check this if this Property accepts Smokers.

Tenancy Info

Matching Property

Lease Period Min Lease Months \* Max Lease Months

6 Click here to save the 'Advertising Status'

, Darlington, Dur Advertising Status Under Offer Advertising Url

Virtual Tour Url 2 Premium Listing Please select a premium listing

Smokers ? Check this if this Property accepts Smokers.

Tenancy Info

Min Lease Months \* 6 Max Lease Months \* 12

Property Type Zoopla Detached Save Changes

Property Age

7

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

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

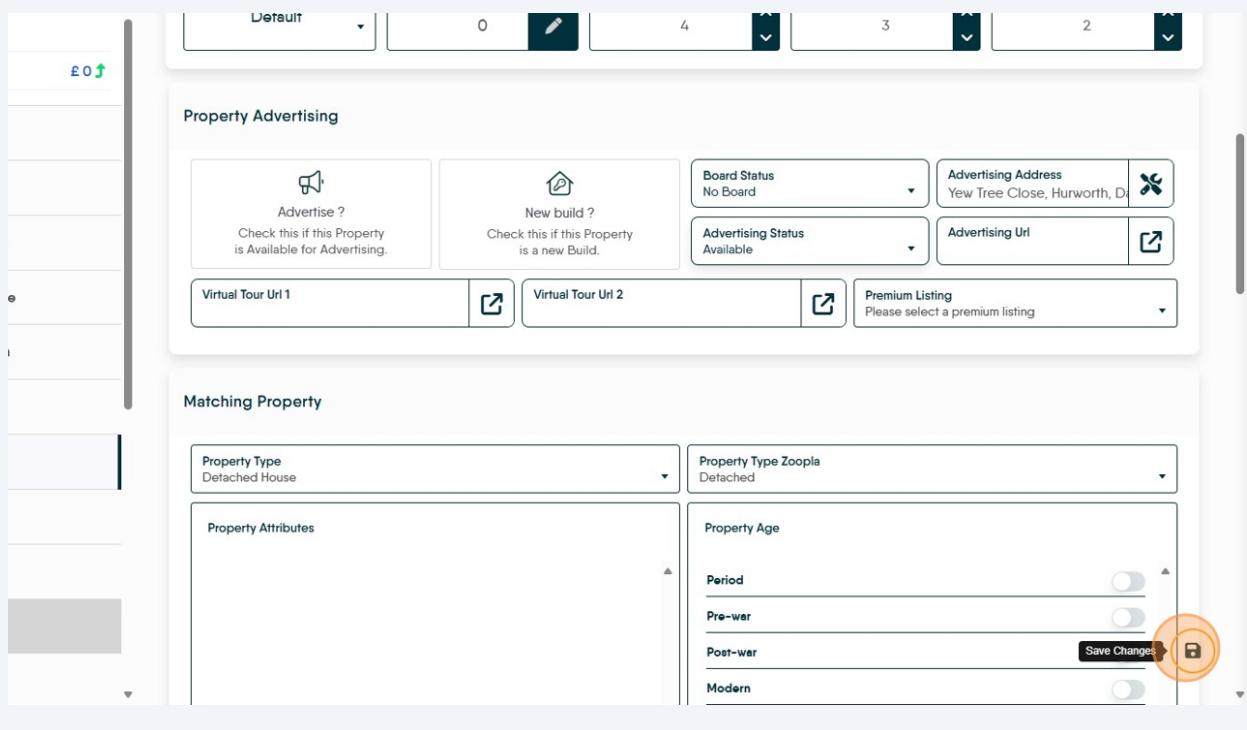
8 From the property record, select 'Marketing'

The screenshot shows a property record for '162 Yew Tree Close, Hurworth, Darlington, DL2 2HX'. The 'Marketing' tab is highlighted with an orange circle. The interface includes sections for 'Prices and Matching' (with fields for Prefix, Price (GBP), Bedrooms, Bathrooms, and Reception) and 'Property Advertising' (with fields for Board Status, Advertising Address, and Advertising Status). The 'Advertising Status' dropdown is currently set to 'No Board'.

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

The screenshot shows the 'Property Advertising' section. The 'Advertising Status' dropdown is highlighted with an orange circle and set to 'Available'. Other fields shown include 'Advertise?' and 'New build?' checkboxes, 'Board Status' (set to 'No Board'), 'Advertising Address' (set to 'Yew Tree Close, Hurworth, D'), 'Advertising Url' (with a link icon), 'Virtual Tour Url 1' and 'Virtual Tour Url 2' fields, and a 'Premium Listing' dropdown.

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, DL2 2HX

Advertising Status: Available

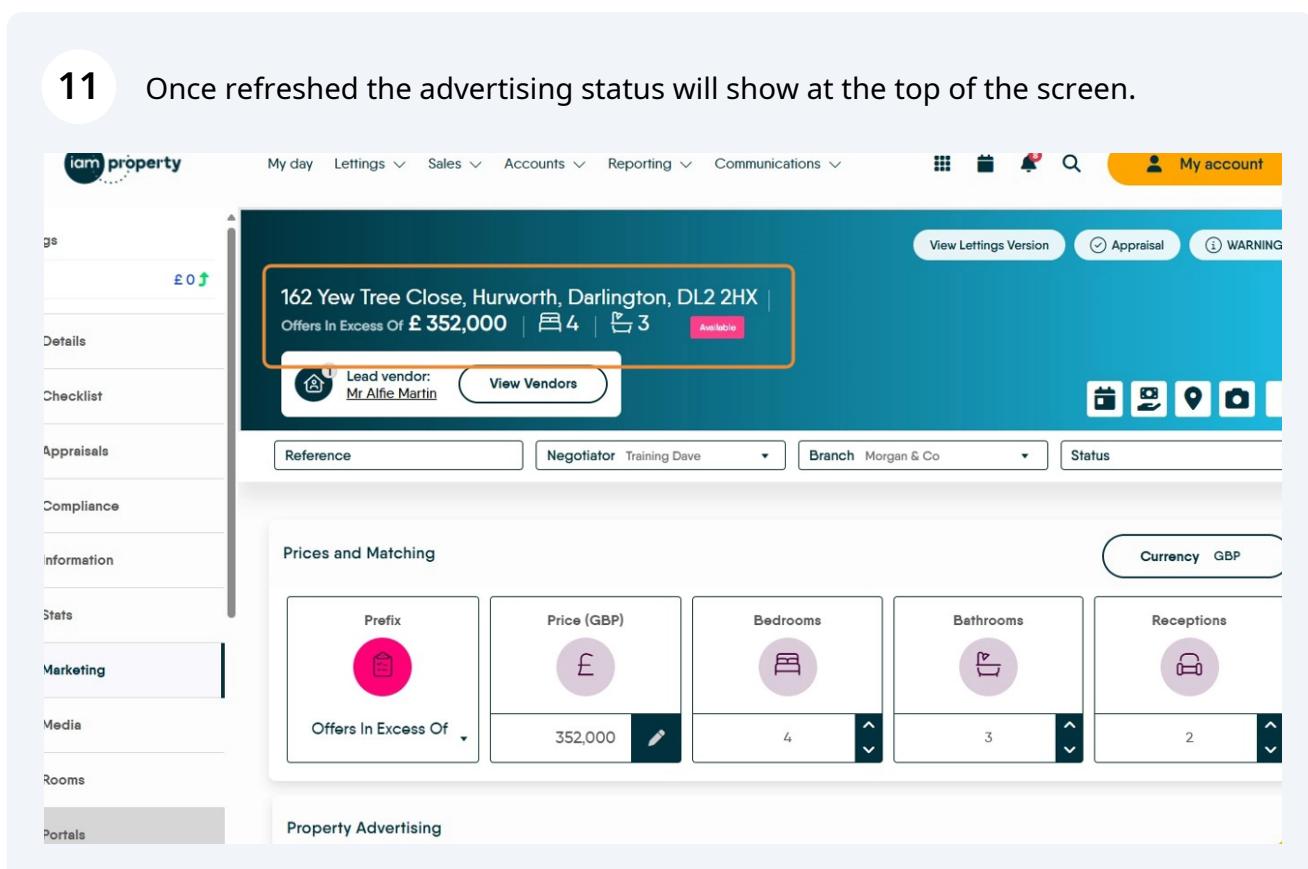
Virtual Tour Url 1

Virtual Tour Url 2

Premium Listing: Please select a premium listing

Save Changes

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



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

Lead vendor: Mr Alfie Martin

View Vendors

View Lettings Version

Appraisal

WARNING

Details

Checklist

Appraisals

Compliance

Information

Stats

Marketing

Media

Rooms

Portals

Prices and Matching

Prefix

Offers In Excess Of

Price (GBP)

Bedrooms

Bathrooms

Receptions

Currency: GBP

Property Advertising