

Completing the Marketing Screen in a Sales Property Record



Learn how to accurately manage property listing statuses, advertising preferences, and descriptions within the CRM platform. This guide provides a walkthrough of the essential fields required to ensure your property data is complete and ready for market.

Prices and Matching

- 1
- Navigate to the **Marketing** screen of the property you are completing.

£ 500,000

Prices and Matching

Currency GBP

Prefix

Guide Price

Price (GBP)

160,000

Bedrooms

3

Bathrooms

1

Receptions

2

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

Advertising Status

Not Advertised

Advertising Url

Virtual Tour Url 1

Virtual Tour Url 2

Premium Listing

Please select a premium listing

Coming to market

Date coming to market

2

Click **"Prices and Matching Currency"** make sure the price, numbers of bedrooms, bathrooms, receptions are correct.

property

My day Lettings Sales Accounts Reporting Communications

My account

£ 500,000

Prices and Matching

Currency GBP

Prefix Guide Price	Price (GBP) £ 160,000	Bedrooms 3	Bathrooms 1	Receptions 2
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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
Virtual Tour Url 1	Virtual Tour Url 2	Advertising Status Not Advertised	Advertising Url
Premium Listing Please select a premium listing			

Date coming to market

3

Click **"Property Advertising"** and (if required) complete all the options on the screen.

Virtual Tour, is where you would add a link to the virtual tour host.

Once the full Marketing screen plus media etc is added to the record the last option to selected is the "Advertise" button, once the screen is saved this will enable the property to be uploaded to the online property portals.

£ 500,000 ↑

Currency GBP

Prices and Matching

Prefix Guide Price	Price (GBP) 160,000	Bedrooms 3	Bathrooms 1	Receptions 2
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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
		Advertising Status Not Advertised	Advertising Url
Virtual Tour Url 1	Virtual Tour Url 2	Premium Listing Please select a premium listing	
Coming to market		Date coming to market	

4

Set the **"Advertising Status"** to "Available" or the option you are using.

£ 500,000 ↑

Prices and Matching

Currency GBP

Prefix  Guide Price ▼	Price (GBP)  160,000 	Bedrooms  3 	Bathrooms  1 	Receptions  2 
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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 
		Advertising Status Not Advertised ▼	Advertising Url 
Virtual Tour Url 1 	Virtual Tour Url 2 	Premium Listing Please select a premium listing ▼	
Coming to market ☐		Date coming to market *	

£ 500,000 ↑

Prices and Matching

Currency GBP

Prefix  Guide Price ▼	Price (GBP)  160,000 	Bedrooms  3 	Bathrooms  1 	Receptions  2 
---	--	---	--	---

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 Pelaw Crescent, Chester le S 
		Advertising Status Available 	Advertising Url 
Virtual Tour Url 1 	Virtual Tour Url 2 	Premium Listing Please select a premium listing ▼	
Coming to market ☐		Date coming to market *	

5 Select a **"Premium Listing"** option if required.

The screenshot shows a property listing form with two main sections: 'Prices and Matching' and 'Property Advertising'.

Prices and Matching:

- Currency:** GBP
- Prefix:** Guide Price
- Price (GBP):** 160,000
- Bedrooms:** 3
- Bathrooms:** 1
- Receptions:** 2

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:** Pelaw Crescent, Chester le S
- Advertising Status:** Available
- Advertising Url:**
- Virtual Tour Url 1:**
- Virtual Tour Url 2:**
- Premium Listing:** Please select a premium listing (highlighted with an orange box)
- Coming to market:** ☐ (highlighted with an orange circle)
- Date coming to market:**

6 If required. Enable the **"Coming to market"** toggle and select the availability date.

The screenshot shows the same property listing form as above, but with the 'Coming to market' toggle highlighted with an orange circle.

Prices and Matching:

- Currency:** GBP
- Prefix:** Guide Price
- Price (GBP):** 160,000
- Bedrooms:** 3
- Bathrooms:** 1
- Receptions:** 2

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:** Pelaw Crescent, Chester le S
- Advertising Status:** Available
- Advertising Url:**
- Virtual Tour Url 1:**
- Virtual Tour Url 2:**
- Premium Listing:** Please select a premium listing
- Coming to market:** ☒ (highlighted with an orange circle)
- Date coming to market:**

Prices and Matching

Currency: GBP

Prefix: Guide Price

Price (GBP): 160,000

Bedrooms: 3

Bathrooms: 1

Receptions: 2

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: Pelaw Crescent, Chester le S

Advertising Status: Available

Advertising Url

Virtual Tour Url 1

Virtual Tour Url 2

Premium Listing: Please select a premium listing

Coming to market ☒

Date coming to market

Auction

7

This allows you to note if the property is **Not suitable for Auction** and add a reason why. Initially select **"Private Treaty"** as the method of sale.

Auction

Not suitable for auction ☒

Reason: Select a reason

Method Of Sale: Private Treaty

Matching Property

Property type: Please select a property type

Property style: Please select a property style

Rightmove type: Detached House

Zoopla type: Terraced

This also includes On The Market and your agent website.

Property attributes: Single Garage, Parking

Property age: Period, Pre-war

Matching Property

8

In **"Property Type"** Select the property type from the drop down menu

Auction

Not suitable for auction ☐

Reason

Method Of Sale

Matching Property

Property type

Property style

Rightmove type

Zoopla type

This also includes On The Market and your agent website.

Property attributes

Single Garage ☐

Parking ☐

Garden ☐

Property age

Period ☐

Pre-war ☐

Post-war ☒

Modern ☐

New-build ☐

9

In **"Property Style"** Select the property style from the drop down menu.

Auction

Not suitable for auction ☐

Reason

Method Of Sale

Matching Property

Property type

Property style

Rightmove type

Zoopla type

This also includes On The Market and your agent website.

Property attributes

Single Garage ☐

Parking ☐

Garden ☐

Property age

Period ☐

Pre-war ☐

Post-war ☒

Modern ☐

New-build ☐

10

This will set the Rightmove and Zoopla property classification as well as On The Market and your own website

My dayLettings ▾Sales ▾Accounts ▾Reporting ▾Communications ▾

gs
£ 500,000 ↑

Details

Checklist

Appraisals

Compliance

Information

Stats

Marketing

Media

Rooms

Portals

Auction

Not suitable for auction

Reason
Select a reason

Method Of Sale
Private Treaty

Matching Property

Property type
House

Property style
Semi-Detached

Rightmove type
Semi-Detached House

Zoopla type
Semi Detached

This also includes On The Market and your agent website.

Property attributes

Single Garage

Parking

Garden

Property age

Period

Pre-war

Post-war

11

Click **"Property attributes"** **"Property Age"**, **"Custom Style"** and **"Other Criteria"** are optional selections that can help make a match to an Applicant more exact.

Setting these options needs to be linked to setting the same option on an Applicant record otherwise there will be no match. This set of options is mirrored in an Applicant record.

This also includes On The Market and your agent website.

Property attributes	Property age	Custom style	Other criteria
Single Garage ☐	Period ☐	30's Semi ☐	Potential Vendor ☐
Parking ☐	Pre-war ☐	Addison Homes ☐	Double Glazing ☐
Garden ☐	Post-war ☒	Georgian ☐	
	Modern ☐	Victorian ☐	
	New-build ☐	Tudor ☐	

Descriptions

12

Click **"Enter Property Main Description"** type the full property description into this screen.

Descriptions / SMS

Characters: 1/20,000

Main Summary Extra 1 Extra 2 SMS

B *I* U  

Enter Property Main Description

Key Features Added

Characters: 0

Key Features

Click here and start typing the Key Features...

Descriptions / SMS

Characters: 5,062/20,000

Main Summary Extra 1 Extra 2 SMS

B *I* U  

et within an attractive and established residential development, this substantial detached family home offers over 2,500 sq ft of beautifully arranged accommodation, perfectly suited to modern family life. With five bedrooms, multiple reception spaces and a superb west-facing garden, the property provides an exceptional balance of comfort, flexibility and practicality.

The welcoming entrance hall sets the tone for the home, introducing a layout designed around both everyday living and entertaining. To the front, the elegant lounge offers a peaceful retreat, flooded with natural light from dual-aspect windows and providing a comfortable setting for relaxing with family and friends.

Key Features Added

Characters: 0

Key Features

Click here and start typing the Key Features...

13 Navigate to the **Summary** option and enter the property summary description.

Descriptions / SMS

Characters: 0/960

Main **Summary** Extra 1 Extra 2 SMS

B *I* U  

Enter Property Summary Description

Key Features Added

Characters: 0

Key Features

Click here and start typing the Key Features...

Descriptions / SMS

Characters: 372/960

Main **Summary** Extra 1 Extra 2 SMS

B *I* U  

Set within an attractive and established residential development, this substantial detached family home offers over 2,500 sq ft of beautifully arranged accommodation, perfectly suited to modern family life. With five bedrooms, multiple reception spaces and a superb west-facing garden, the property provides an exceptional balance of comfort, flexibility and practicality.

Key Features Added

Characters: 0

Key Features

Click here and start typing the Key Features...

Key Features

14

Type and add **Key Features** to the property listing. Up to 10 can be added and show as bullet points on the property upload.
Review the list of added key features.

Key Features Added

Characters: 0

Key Features

Click here and start typing the Key Features...



Others

Land Usage

Directions

Minimum Size

0

Max Size

0

sqm

sqft

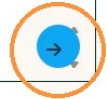
Viewing Arrangements

Key Features Added

Characters: 21

Key Features

Beautiful Family Home



Others

Land Usage

Directions

Minimum Size

0

Max Size

0

sqm

sqft

Viewing Arrangements

The welcoming entrance hall sets the tone for the home, introducing a layout designed around both everyday living and entertaining. To the front, the elegant lounge offers a peaceful retreat, flooded with natural light from dual-aspect windows and providing a comfortable setting for relaxing with family and friends.

Key Features Added

Characters: 0

Key Features

Click here and start typing the Key Features...



1

Beautiful Family Home

TD

Training Dave
14 July 2026



2

Detached

TD

Training Dave
14 July 2026



3

Large Open Plan
Kitchen/Dining/Family

TD

Training Dave
14 July 2026



Others



Others

15

"Viewing Arrangements" If required add notes in here about any requirements when completing a viewing

Others

Land Usage

Directions

Minimum Size
0

Max Size
0

sqm

sqft

Viewing Arrangements

Applicant Matched

Applicant Matched

Applicant Matched Counter
0



Remember to click **Save** before leaving the page.