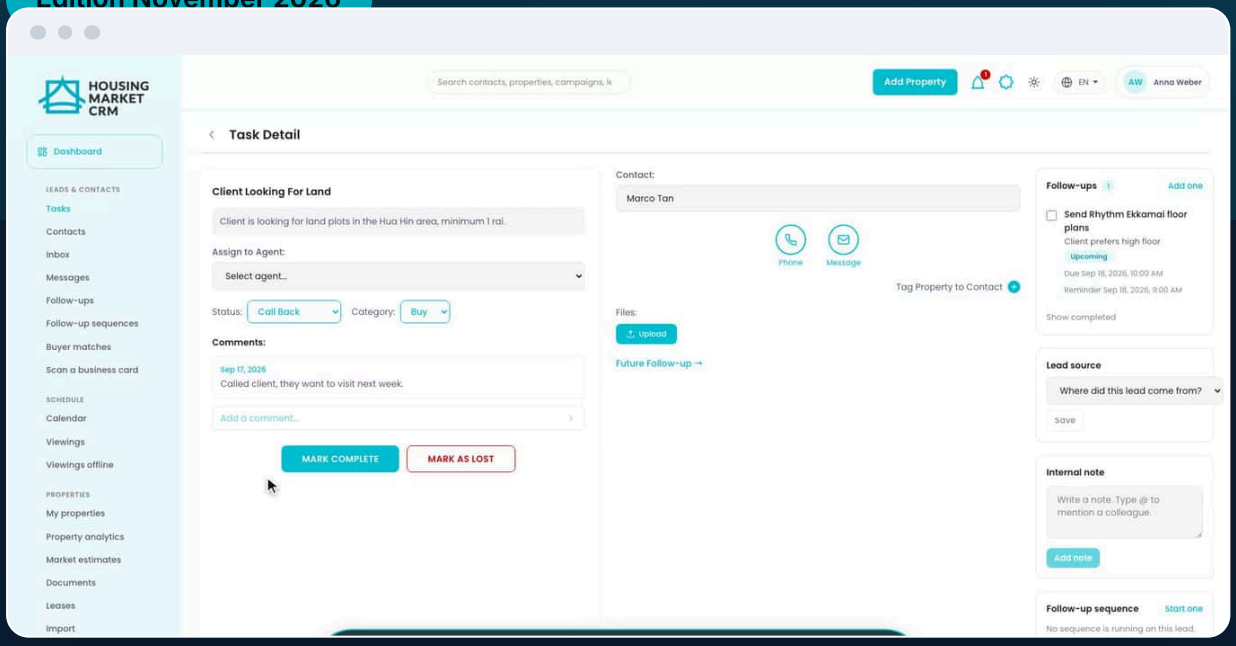
HOUSING MARKET CRM

HOUSING MARKET GROUP

Housing Market CRM Handbook

For agents, agents who want their properties on their own website, agents and agencies, office managers, property developers, letting agencies and landlords, admins and agents in thailand

Edition November 2026



HOUSING MARKET GROUP

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PART 1

Getting started

1 Create your account

2 When your email already has an account

3 Sign in

4 Reset your password

5 Your dashboard

6 Update your profile

7 Switch the language

8 Search everything

9 Verify your email by link

10 What Beta, New and Currently updating mean

11 Link in bio: one link for your social profiles

1 CHAPTER 1

Create your account

All plans | For agents | Watch the video

OVERVIEW

Choose Create a free account, fill in your name, email, a password and your country, then click the link in the verification email. There is no code to type. The account is also your agent account on that country's portal.

- Open https://dashboard.housingmarketcrm.com/signup, or choose Sign up on housingmarketcrm.com.
- Enter your First name, Last name, Email, a Password of at least eight characters, and the Country you work in.
- Choose Create account.
- Check your email and click the verification link. There is no code to type. The link in the CRM's email works for 7 days.
- Log in with your email address and password.

The account is created as an agent account on the Housing Market portal for the country you chose, so the same email and password also sign you in there. It starts on the free plan, with no card.

Until you have clicked the link you can log in, but you cannot use the CRM: a banner asks you to verify your email address. If the email does not arrive, check your spam folder, then choose Resend verification email on the confirmation screen or on the log-in page, or Send me a new verification email in the banner. If you typed the wrong address, choose Wrong address? Change my email address in the banner. An email address that already belongs to an account on any Housing Market Group portal cannot be used again — log in with that account instead.

From the Help Center: **How do I create a Housing Market CRM account?**

STEP BY STEP

1 Go to dashboard.housingmarketcrm.com.

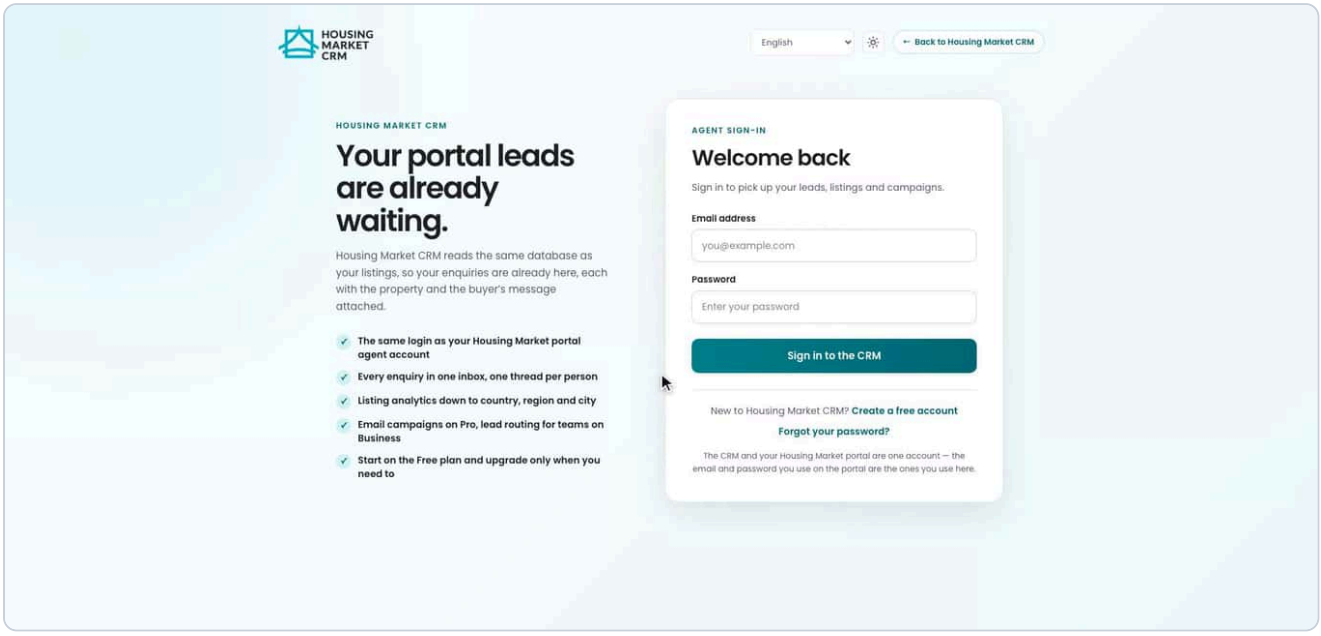


Figure 1.1 · Screen recorded 17 September 2026

2 Already a portal agent? Your portal login works here — no sign-up needed.

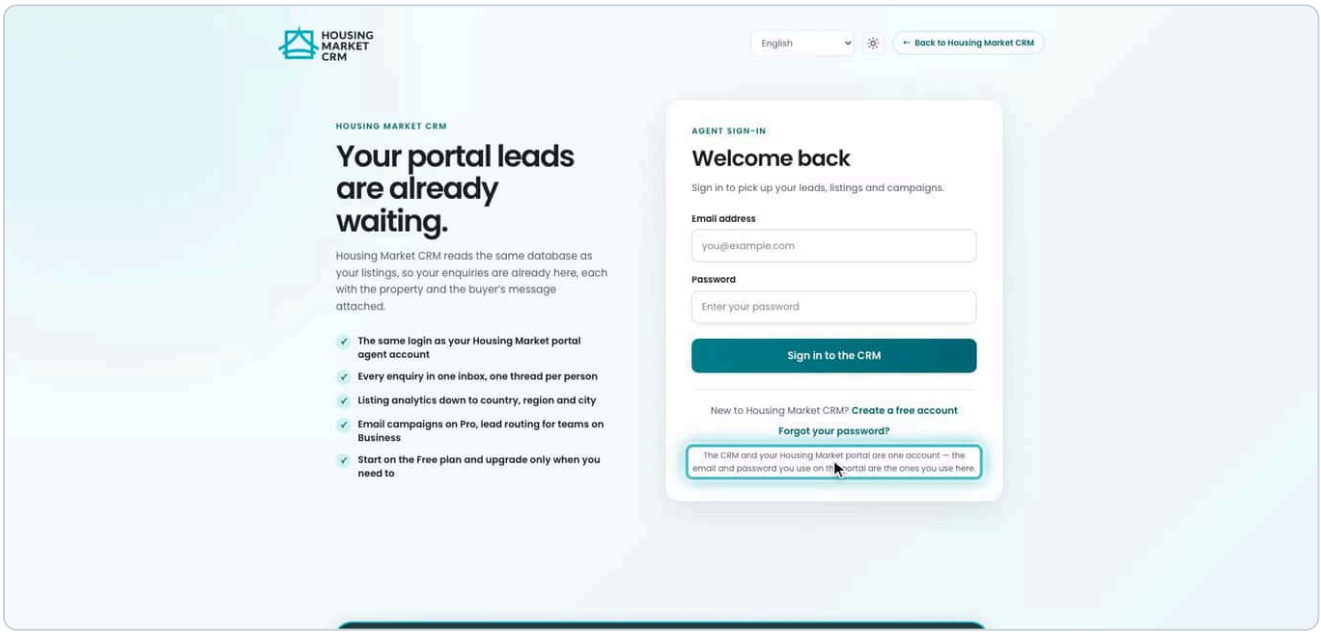


Figure 1.2 · Screen recorded 17 September 2026

3 Otherwise, click **Create a free account**.

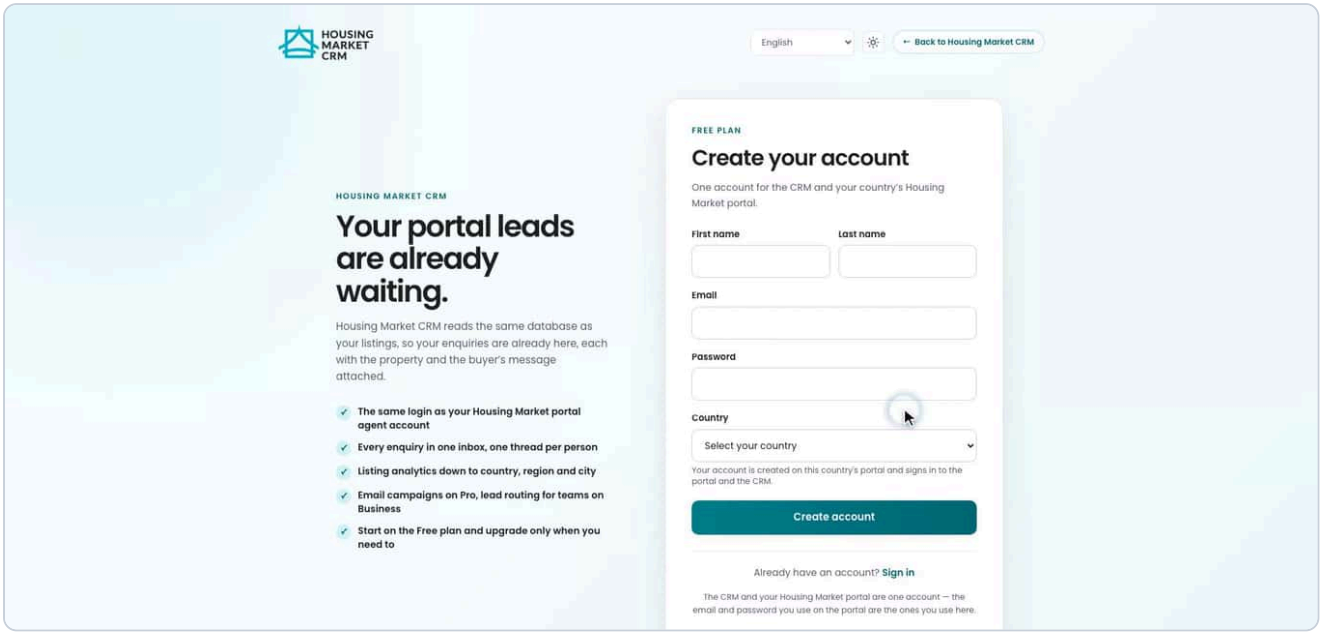


Figure 1.3 · Screen recorded 17 September 2026

4 Enter your **first** and **last name**.

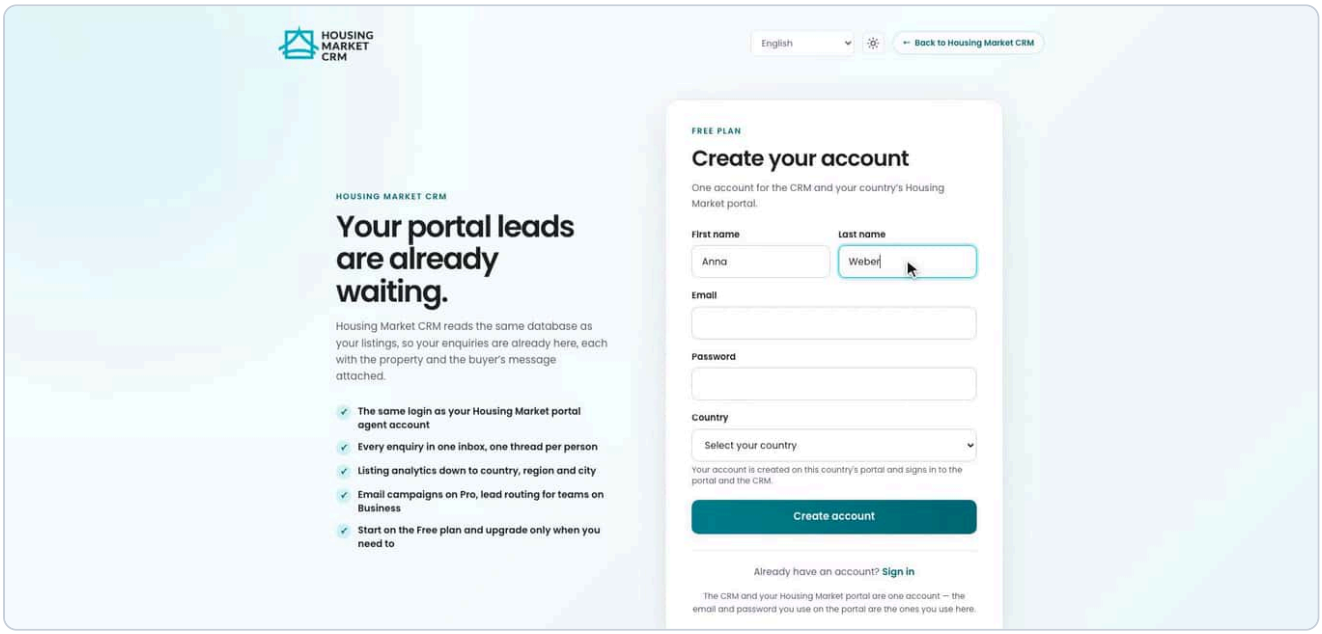


Figure 1.4 · Screen recorded 17 September 2026

5 Enter your **email address**.

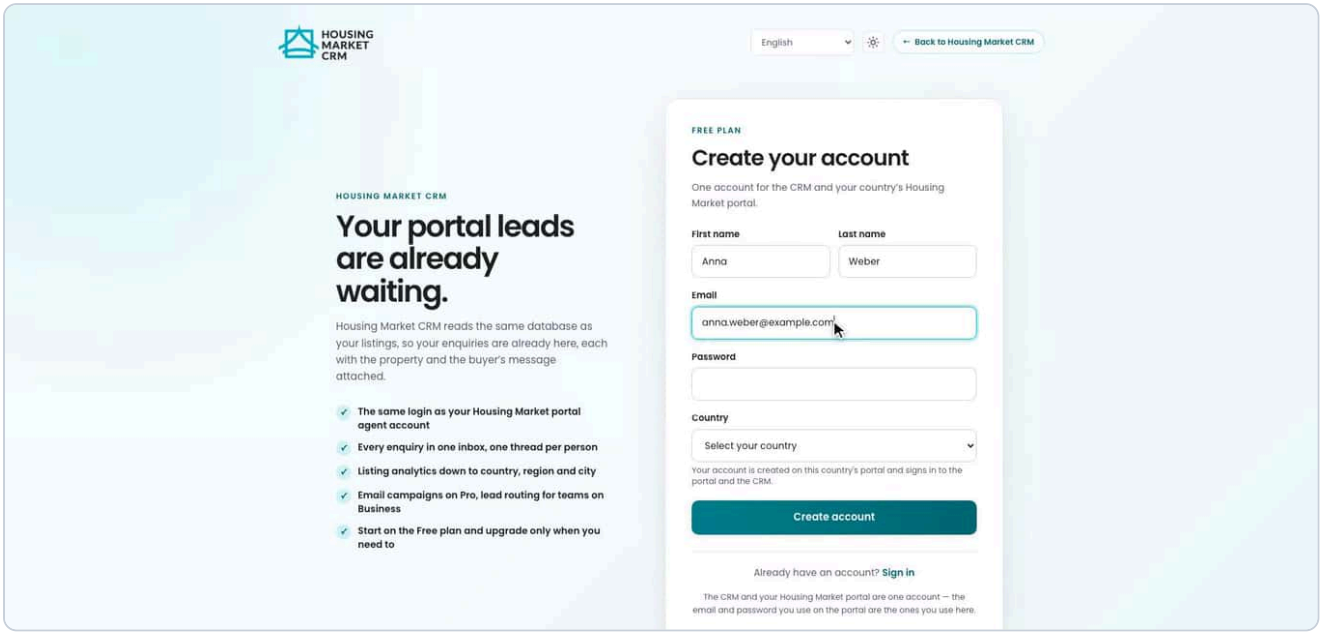


Figure 1.5 · Screen recorded 17 September 2026

6 Choose a **password**.

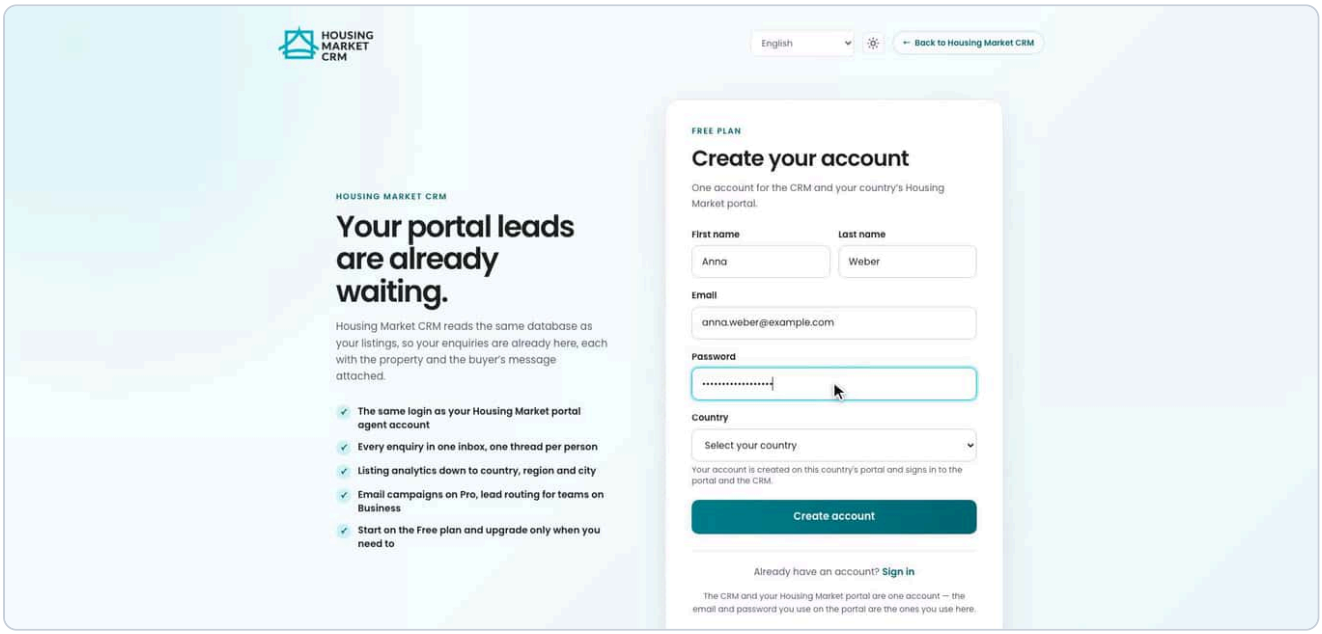


Figure 1.6 · Screen recorded 17 September 2026

7 Pick your **country** — the portal your account belongs to.

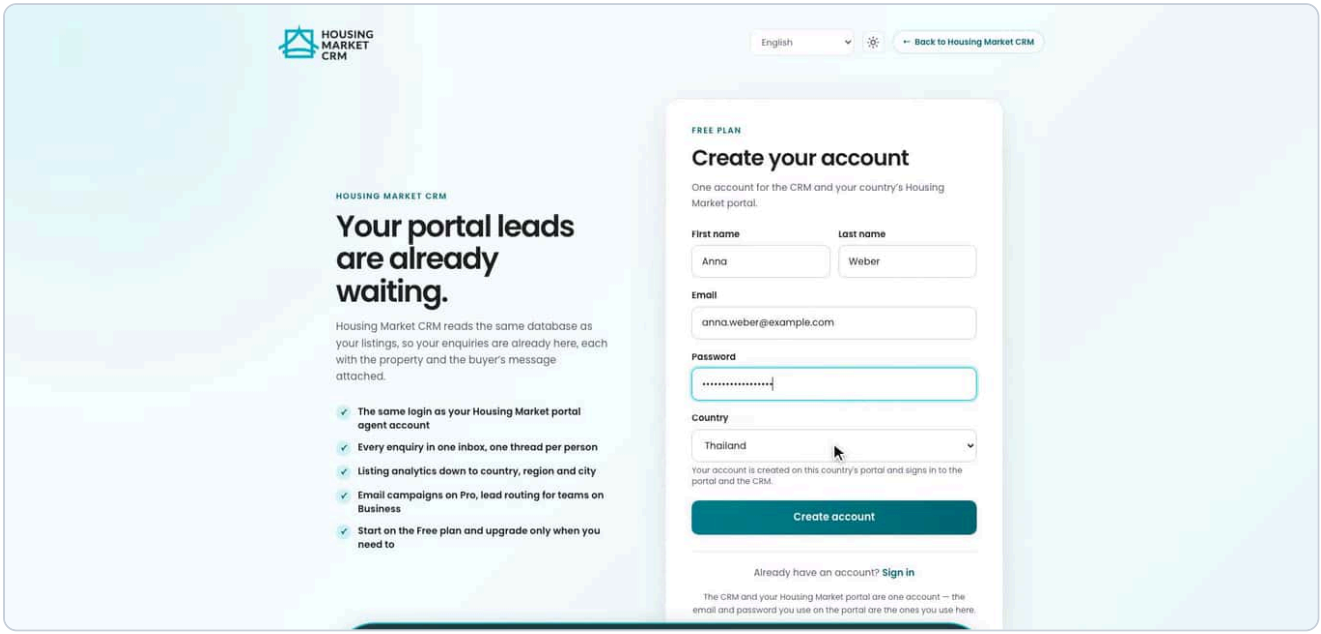


Figure 1.7 · Screen recorded 17 September 2026

8 Click **Create account**.

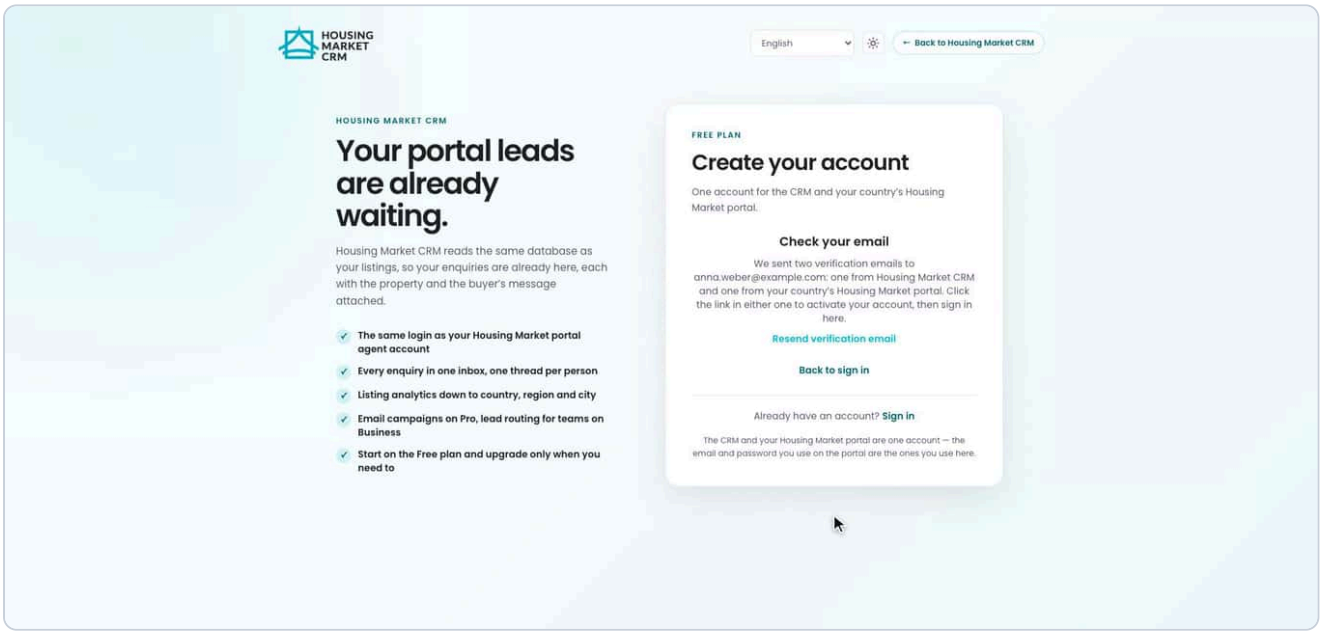


Figure 1.8 · Screen recorded 17 September 2026

9 Check your inbox: we send **two verification emails**.

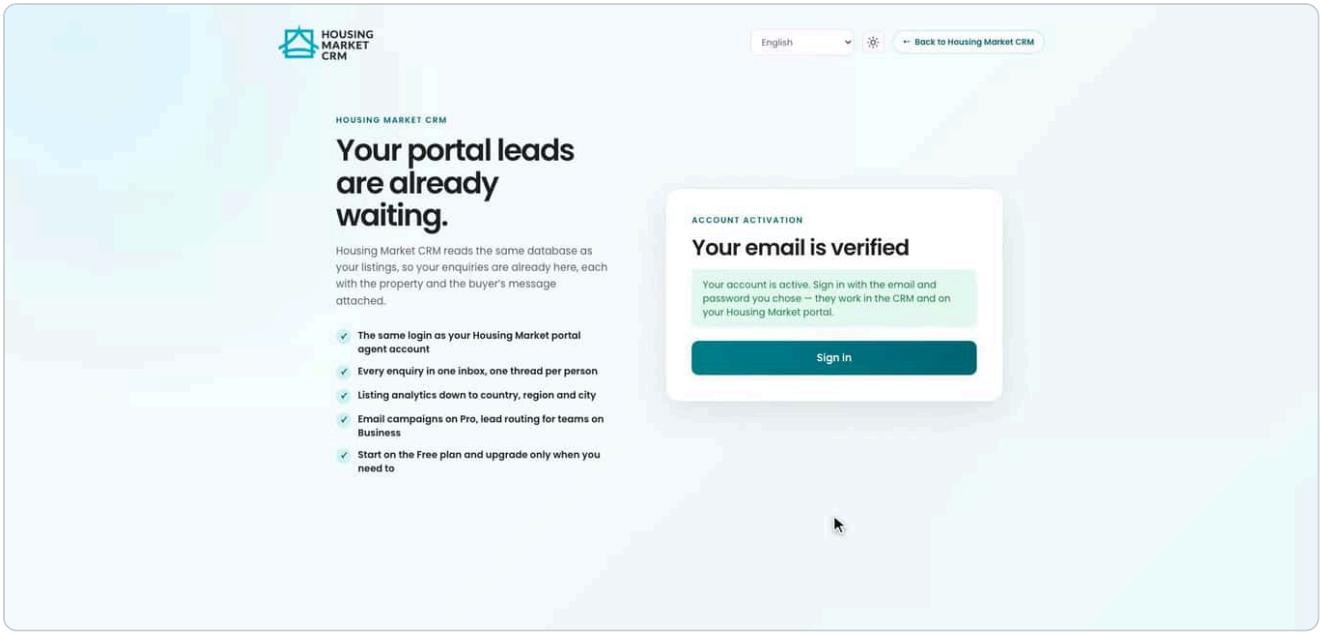


Figure 1.9 · Screen recorded 17 September 2026

10 Click the link in either email to **verify** your address.

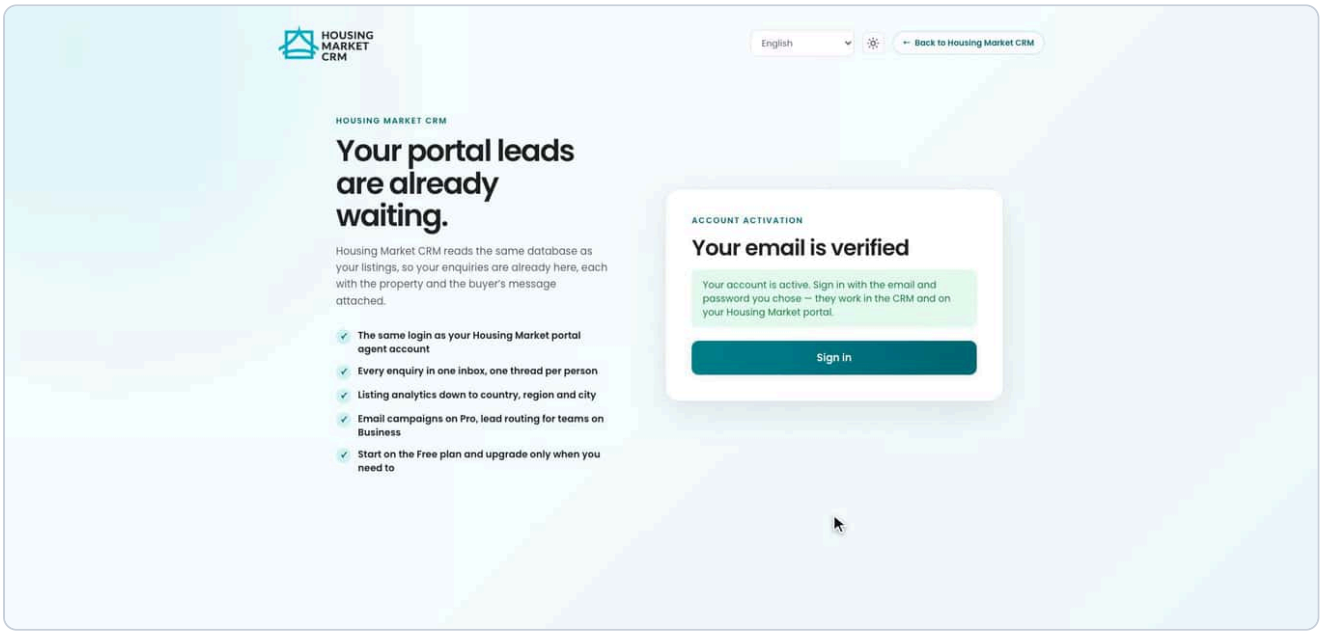


Figure 1.10 · Screen recorded 17 September 2026

11 Your email is verified. Now **sign in** with your new account.

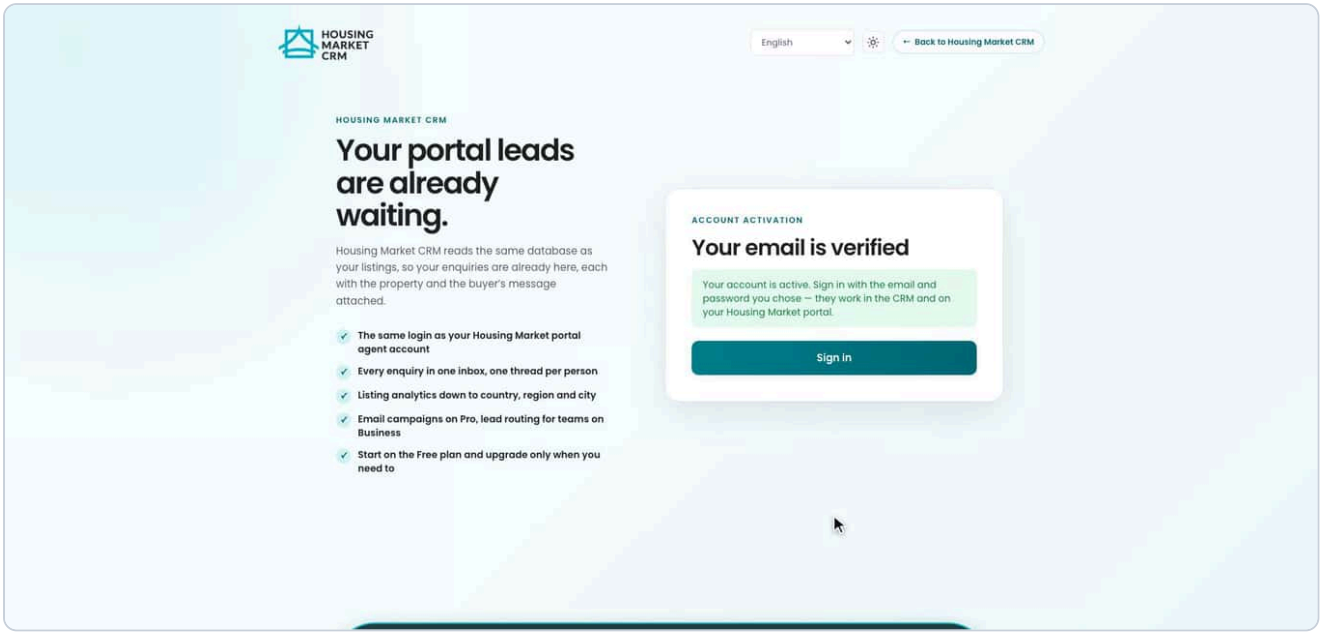


Figure 1.11 · Screen recorded 17 September 2026

GOOD TO KNOW

NOTE

No. One account works for the CRM and the portal. If you already have an agent account on a Housing Market Group portal, log in with it.

Help Center: Do I need a separate CRM account?

RELATED HELP CENTER ARTICLES

Is Housing Market CRM free?	faq.housingmarketgroup.com/faq/is-housing-market-crm-free
How do I start using Housing Market CRM?	faq.housingmarketgroup.com/faq/how-do-i-start-using-housing-market-crm

2 CHAPTER 2

When your email already has an account

All plans | For agents | Watch the video

OVERVIEW

No. One account works for the CRM and the portal. If you already have an agent account on a Housing Market Group portal, log in with it.

The CRM and the portals use the same agent account, so there is no second password to keep and nothing to connect between the two.

If you already have an agent account on a portal, log in to the CRM with the same email address and password. If you do not, create a free account in the CRM — it creates your agent account on the portal for the country you choose at the same time. See "How do I create a Housing Market CRM account?".

From the Help Center: **Do I need a separate CRM account?**

STEP BY STEP

1 On **Create your account**, fill in your details.

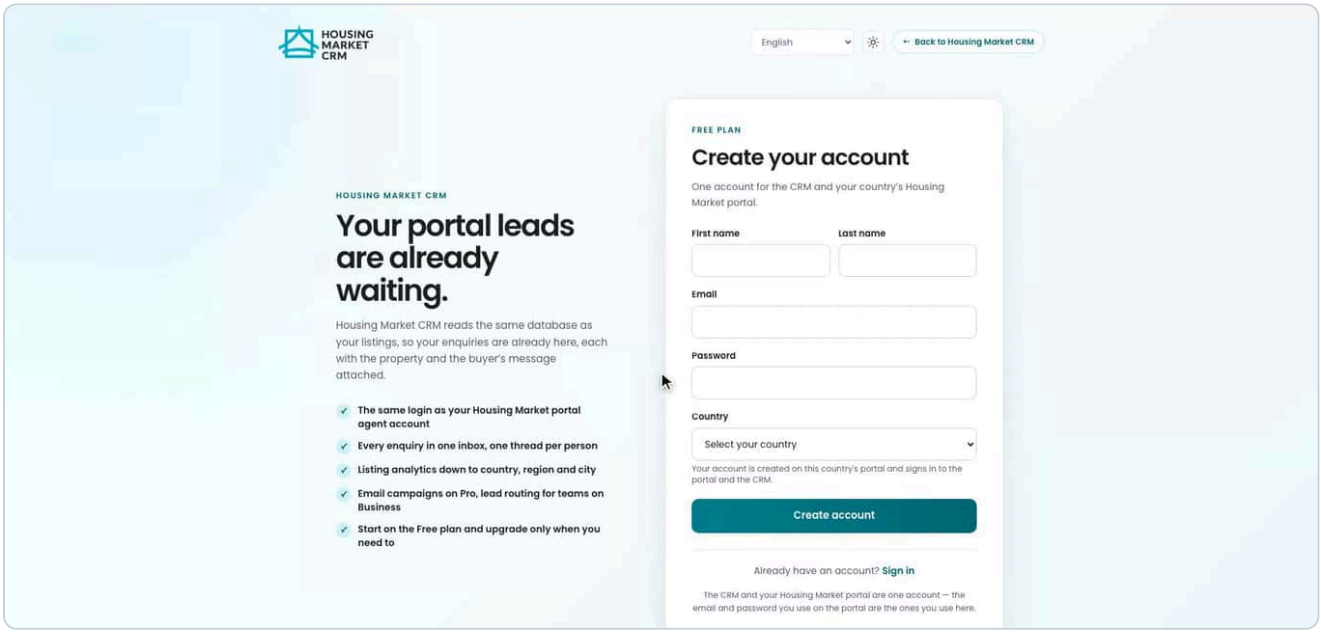


Figure 2.1 · Screen recorded 24 September 2026

2 Your **first** and **last name**.

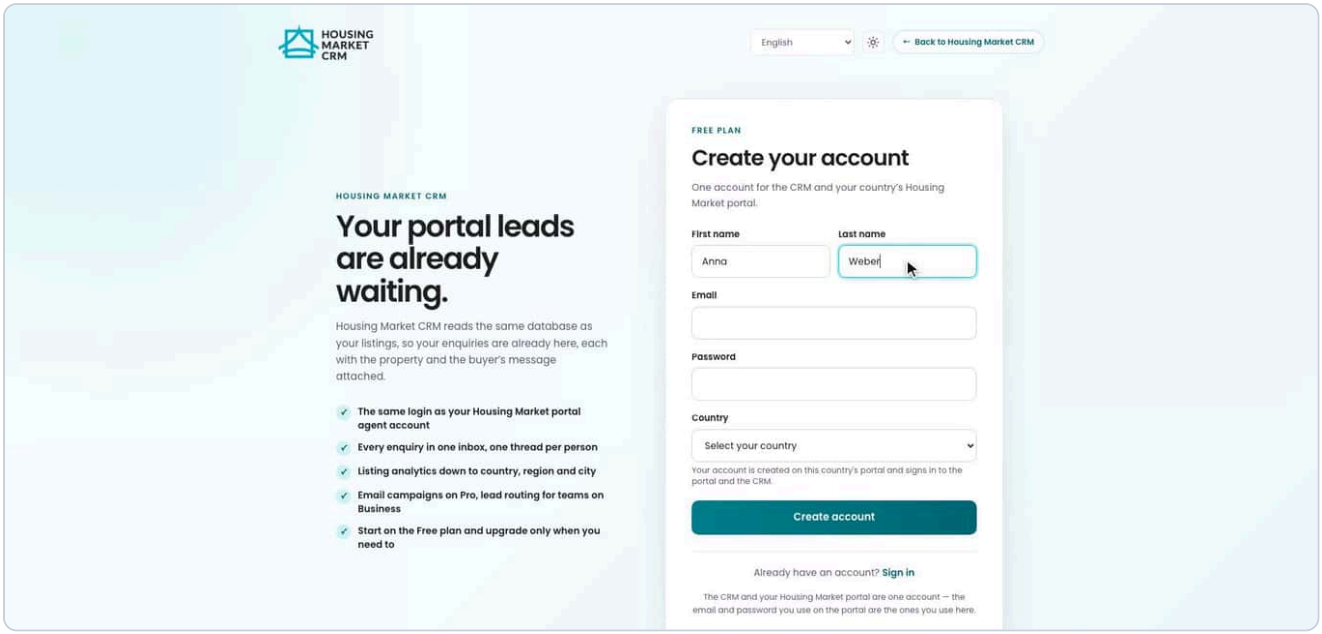


Figure 2.2 · Screen recorded 24 September 2026

3 The **email address** you already work with.

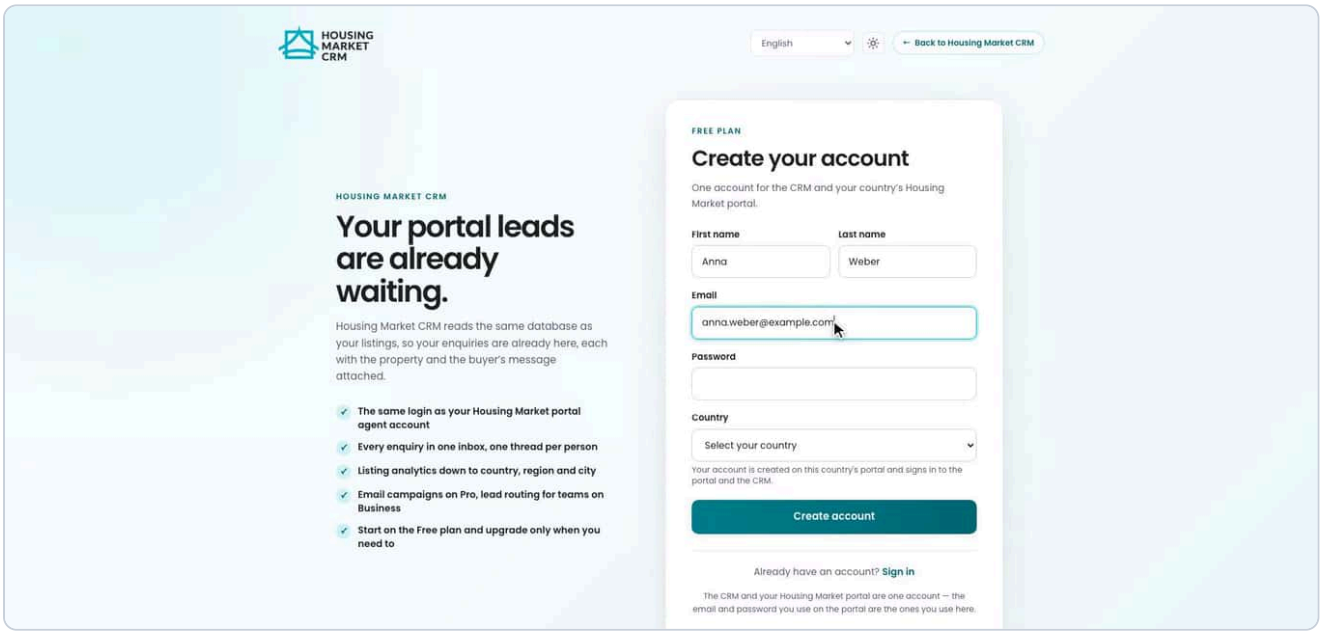


Figure 2.3 · Screen recorded 24 September 2026

4 A **password**.

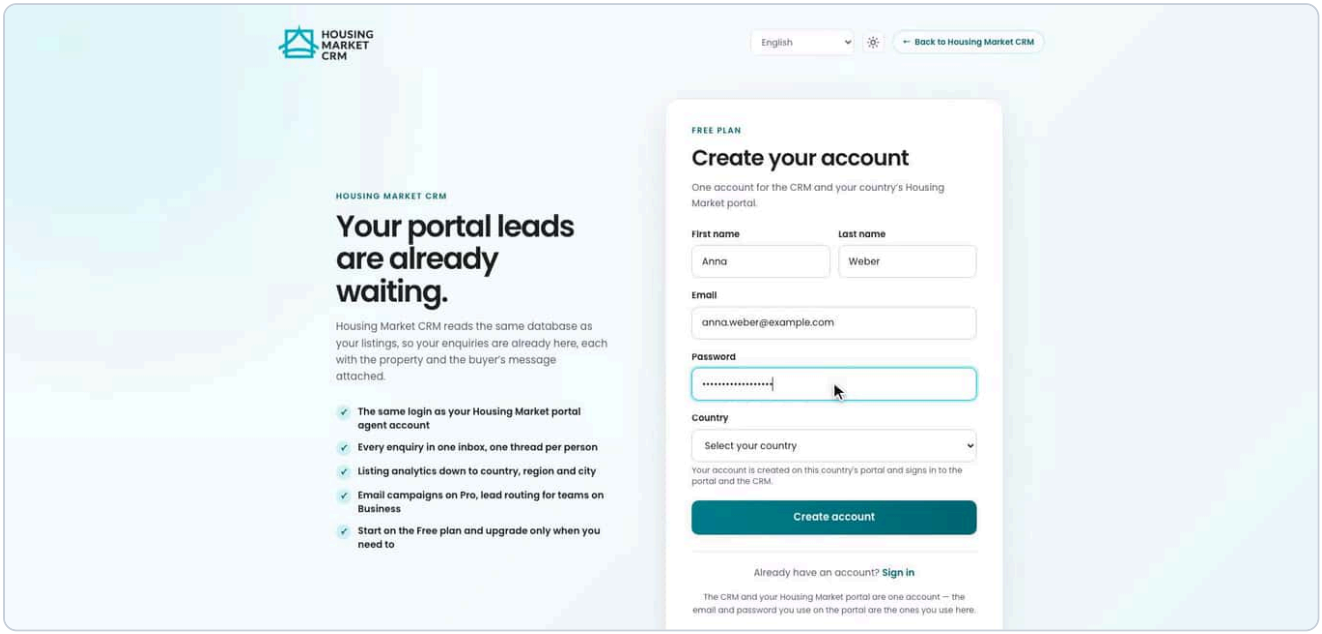


Figure 2.4 · Screen recorded 24 September 2026

5 And your **country**.

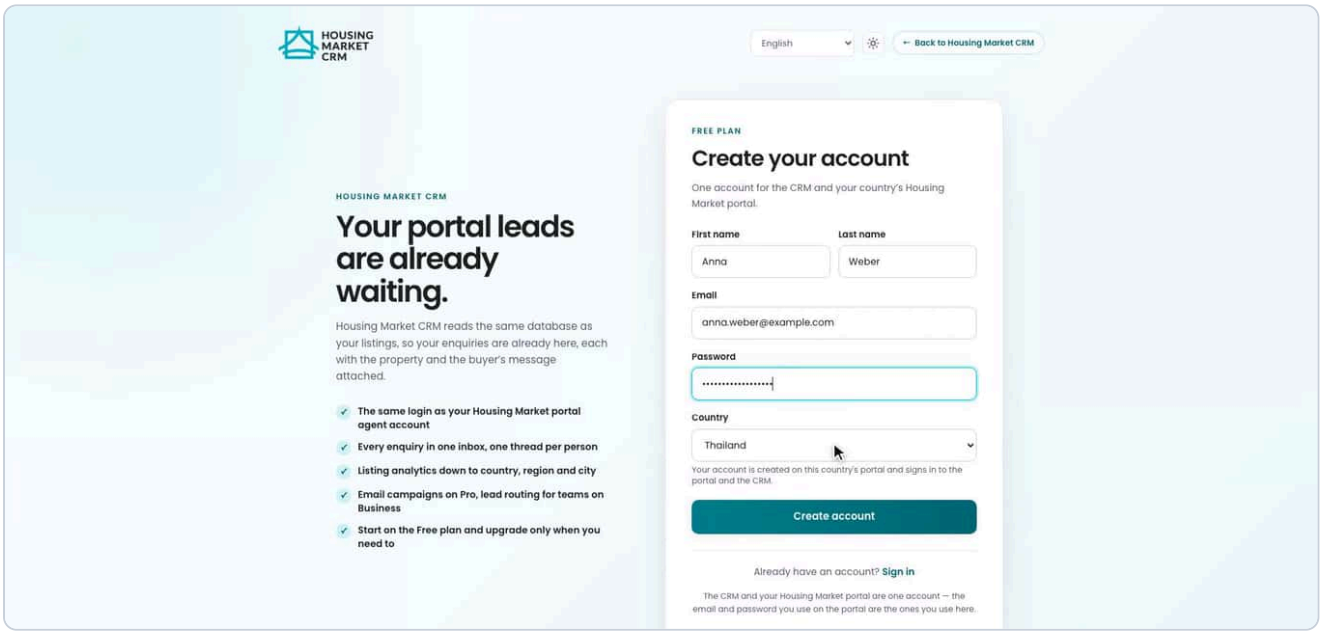


Figure 2.5 · Screen recorded 24 September 2026

6 Click **Create account**.

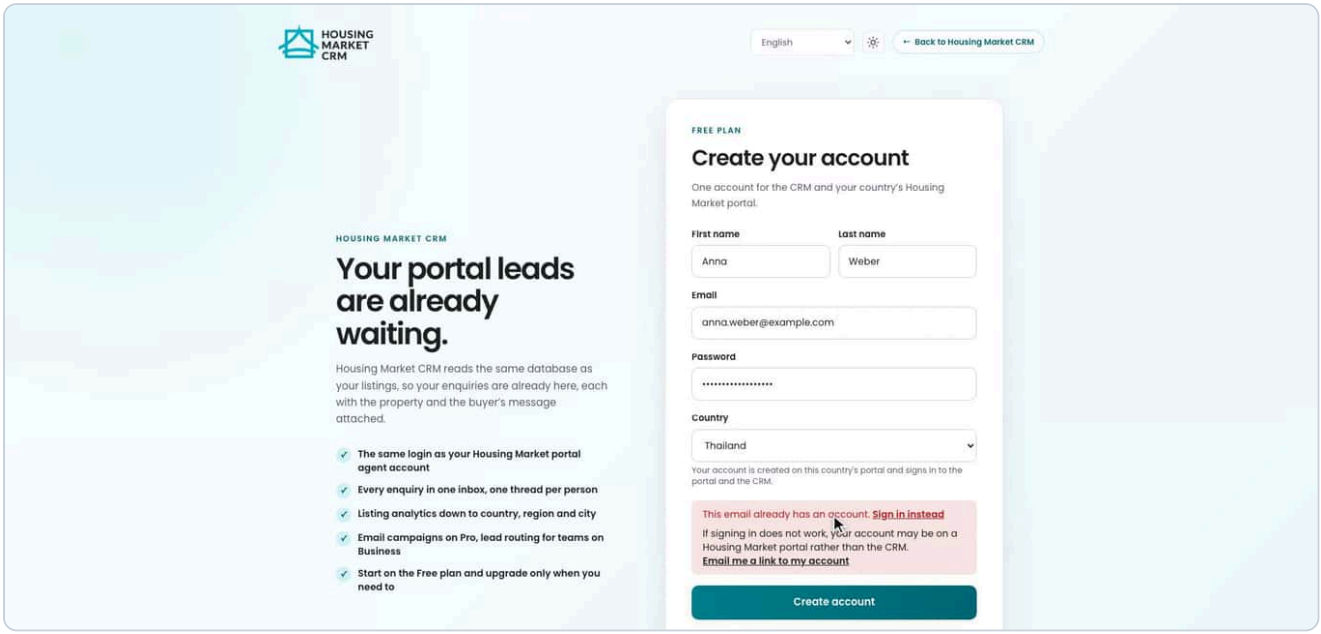


Figure 2.6 · Screen recorded 24 September 2026

7 No second account: **this email already has an account**.

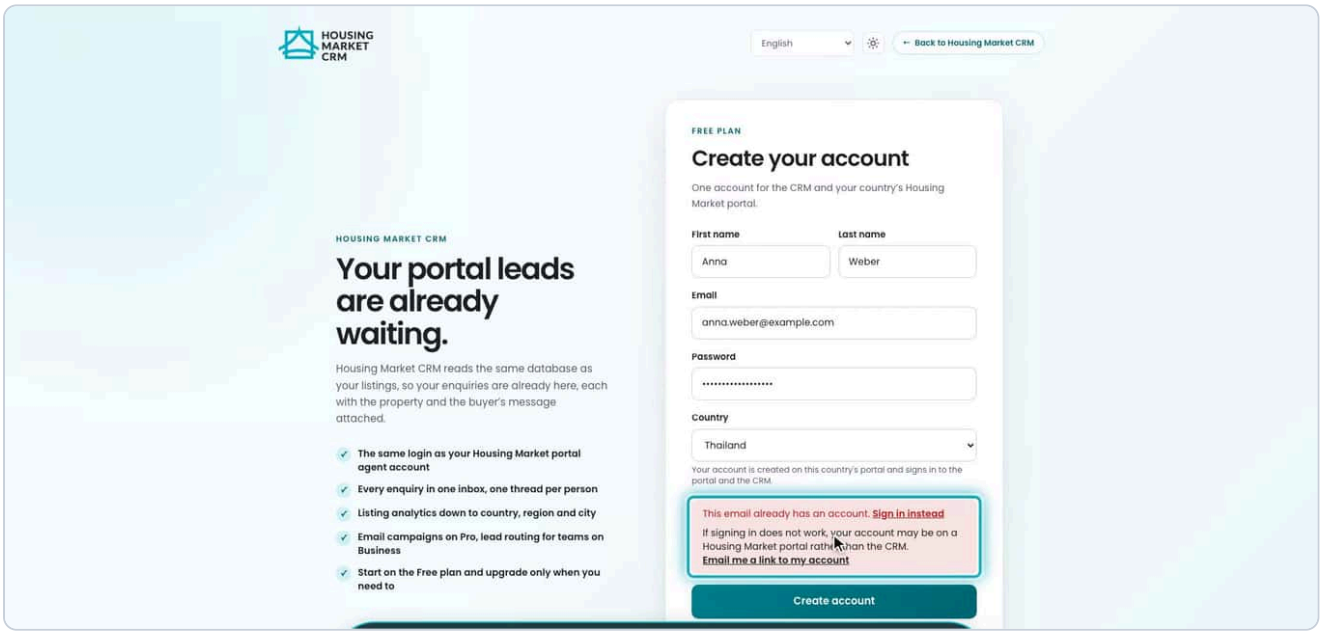


Figure 2.7 · Screen recorded 24 September 2026

8 **Sign in instead** takes you to the sign-in page.

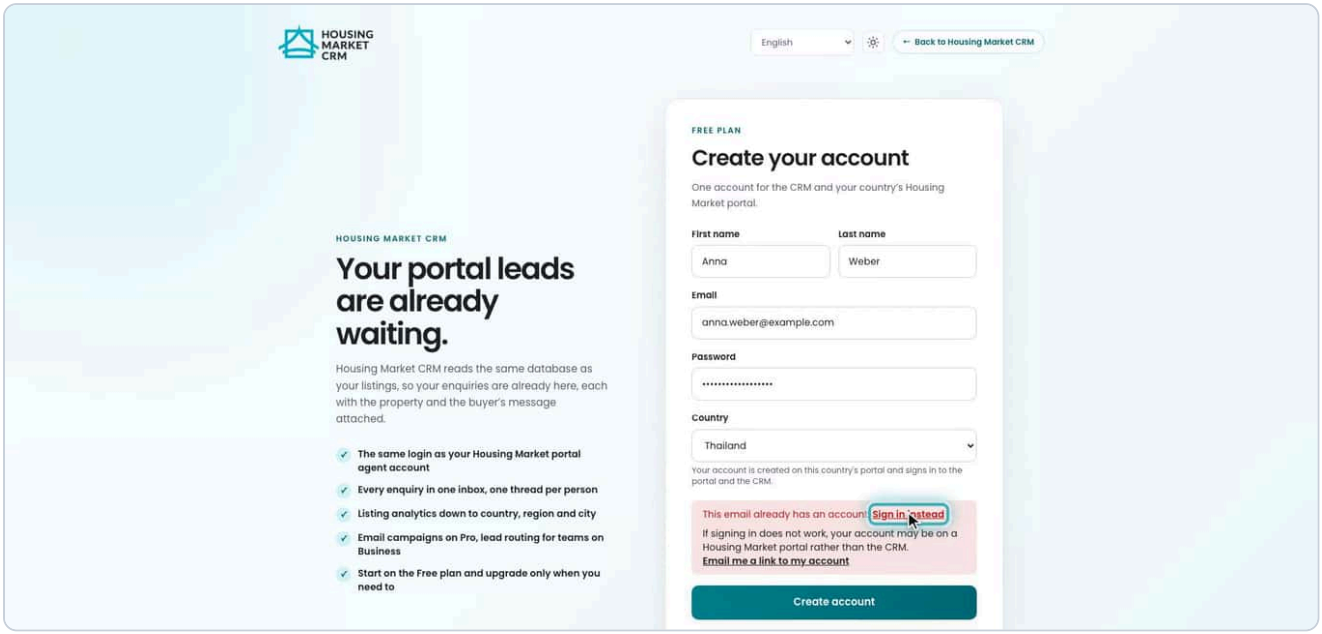


Figure 2.8 · Screen recorded 24 September 2026

9 One email is **one account** across every Housing Market product.

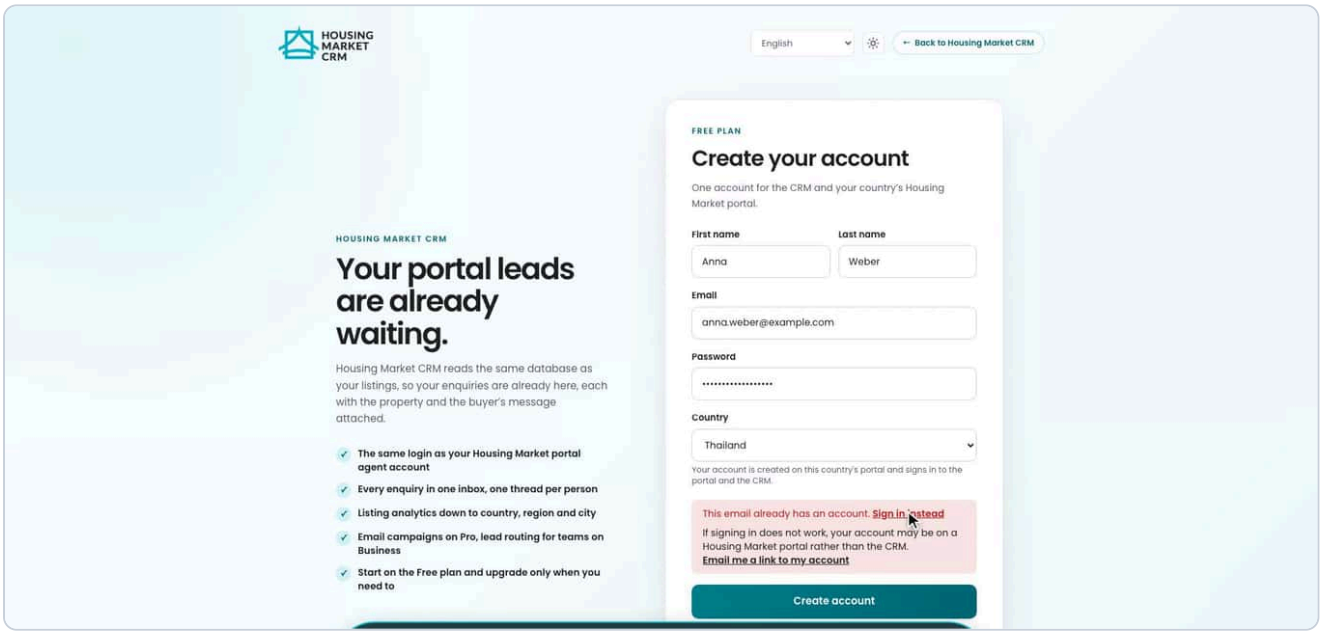


Figure 2.9 · Screen recorded 24 September 2026

10 Your account may be on a **portal** rather than the CRM.

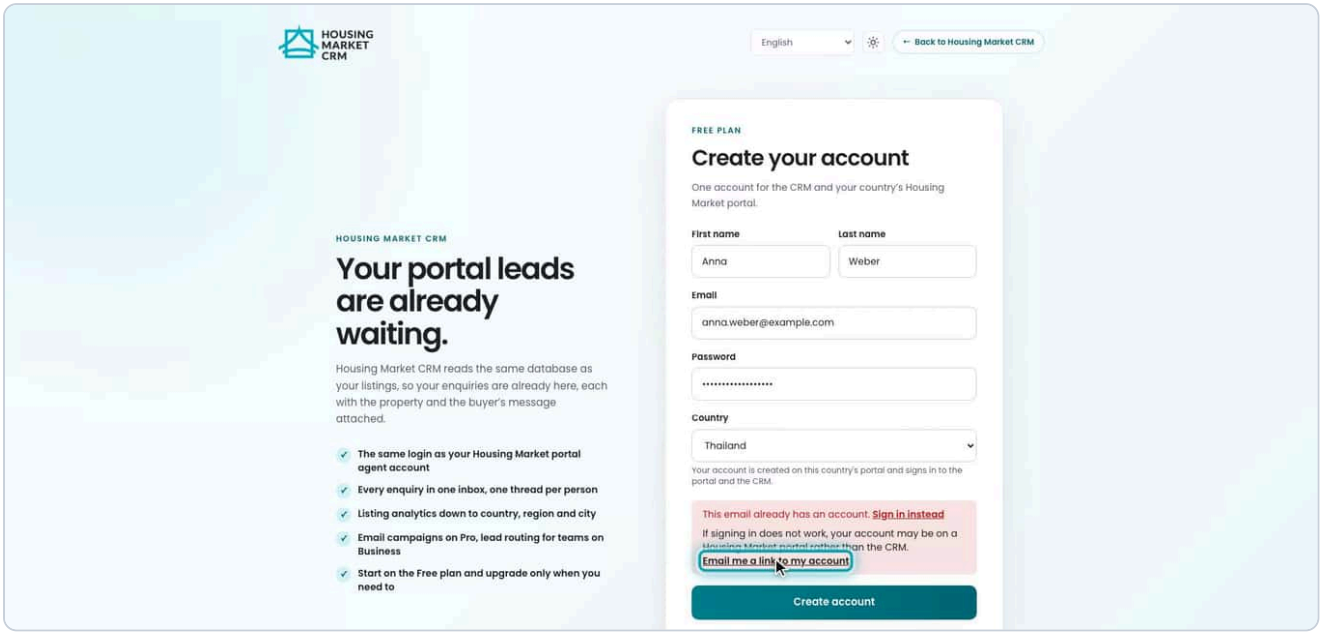


Figure 2.10 · Screen recorded 24 September 2026

11 Click **Email me a link to my account**.

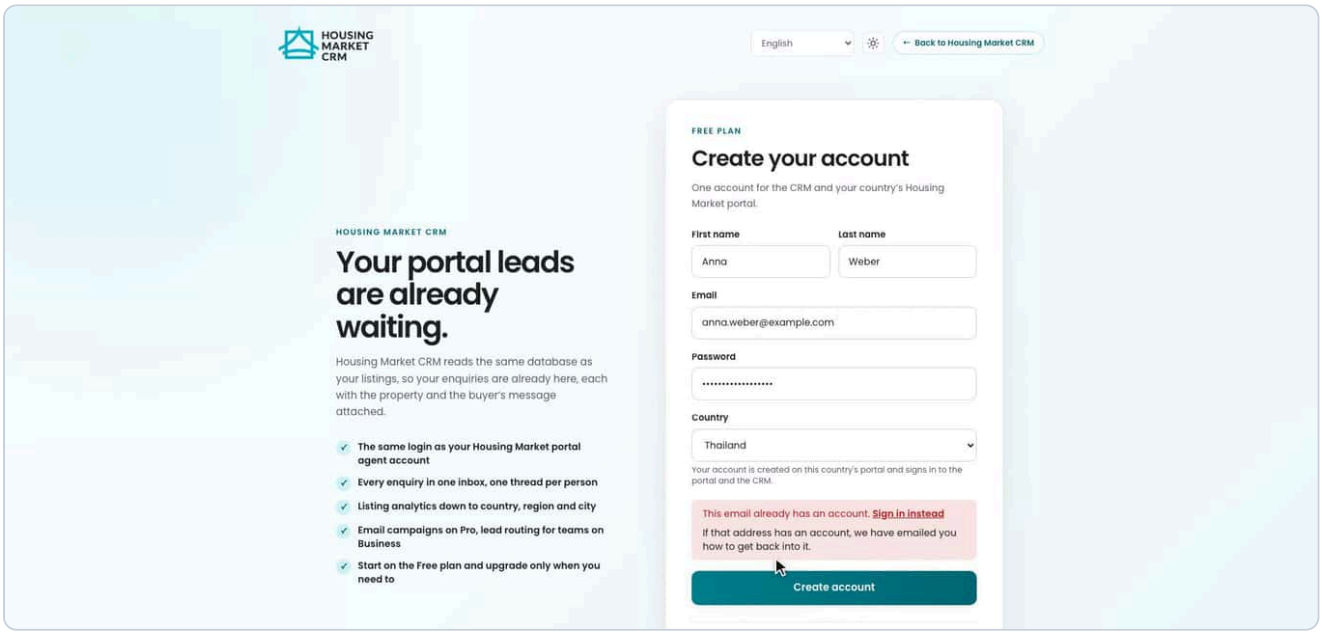


Figure 2.11 · Screen recorded 24 September 2026

12 Check your inbox for the way back in.

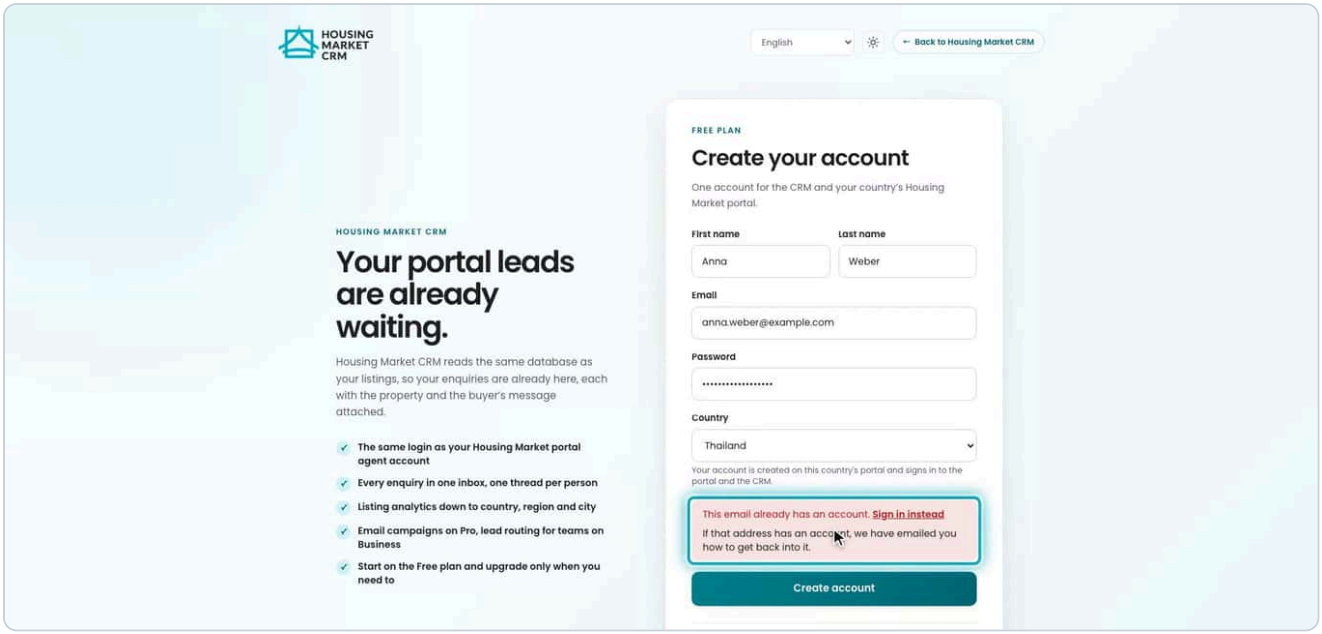


Figure 2.12 · Screen recorded 24 September 2026

13 The wording never says whether an address is registered — that is **on purpose**.

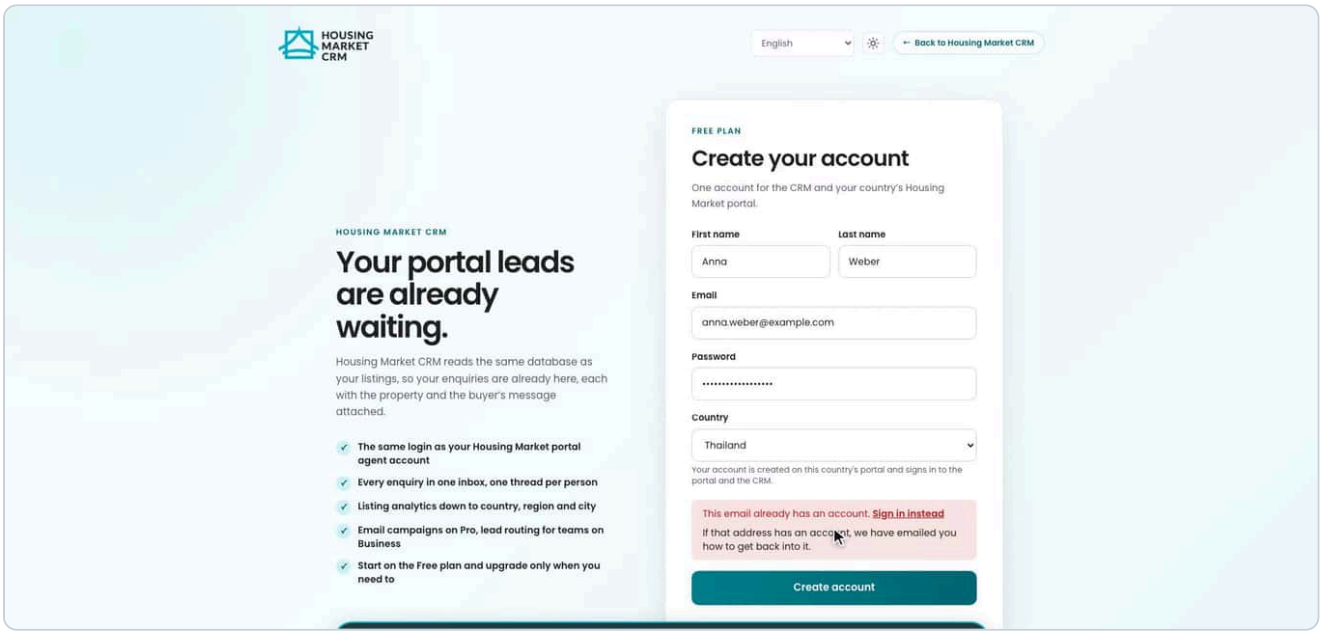


Figure 2.13 · Screen recorded 24 September 2026

GOOD TO KNOW

TIP

Choose Forgot your password? on the log-in page, enter your email address and use the link we send you. The new password works in the CRM and on your portal.

Help Center: How do I reset my Housing Market CRM password?

RELATED HELP CENTER ARTICLES

How do I create a Housing Market CRM account?	faq.housingmarketgroup.com/faq/how-do-i-create-a-housing-market-crm-account
How do I log in to Housing Market CRM?	faq.housingmarketgroup.com/faq/how-do-i-log-in-to-housing-market-crm

3 CHAPTER 3

Sign in

All plans | For agents | Watch the video

OVERVIEW

Go to dashboard.housingmarketcrm.com/login, type in the email address and password of your Housing Market Group agent account and choose Sign in to the CRM.

- Open https://dashboard.housingmarketcrm.com/login, or choose Log in on housingmarketcrm.com.
- Type in your Email address and Password.
- Choose Sign in to the CRM.

It is the same account as your agent account on the portal, so the same details work in both places. The language menu and the light and dark switch are at the top of the page.

- If you see "Invalid email or password", check both and try again, or reset your password.
- If your email address is not verified yet, you can still log in, but a banner stays on the screen and the CRM stays closed until you click the link in the verification email. Choose Send me a new verification email in the banner, or Resend verification email on the log-in page, to get a fresh link. There is no code to type.
- If you have forgotten your password, choose Forgot your password? — see "How do I reset my Housing Market CRM password?".
- If you have never had an account, choose Create a free account — see "How do I create a Housing Market CRM account?".

From the Help Center: **How do I log in to Housing Market CRM?**

STEP BY STEP

1 Go to dashboard.housingmarketcrm.com.

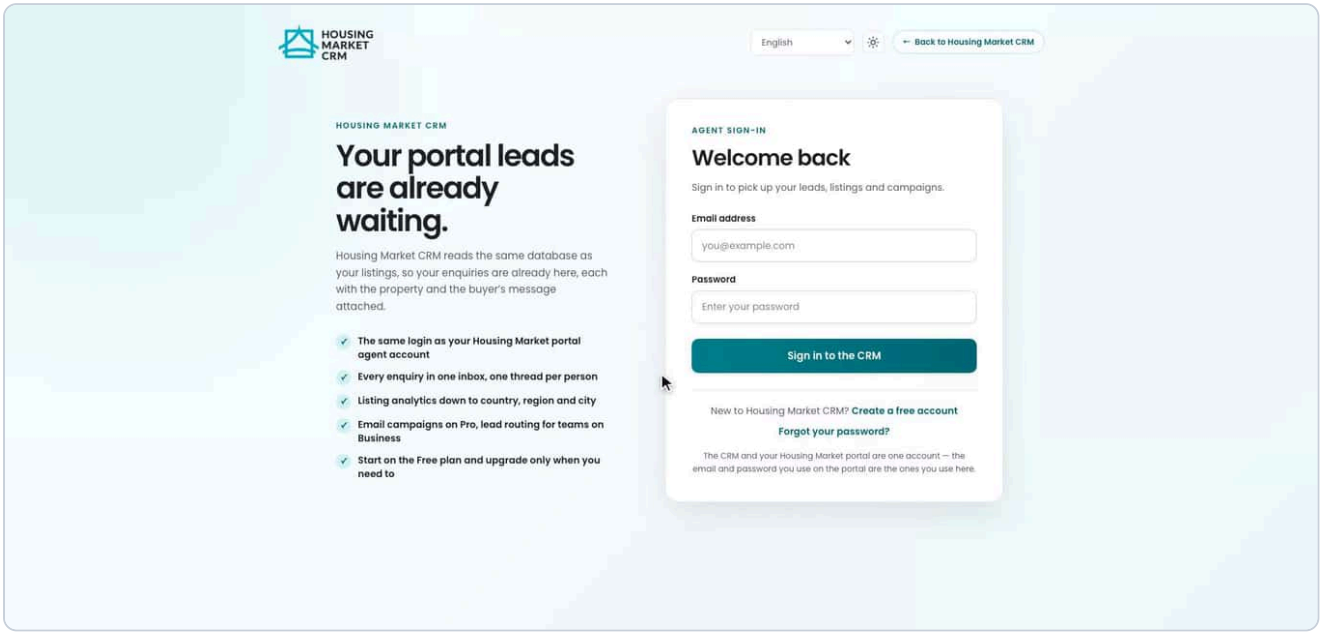


Figure 3.1 · Screen recorded 17 September 2026

2 The CRM and your portal agent account are one account.

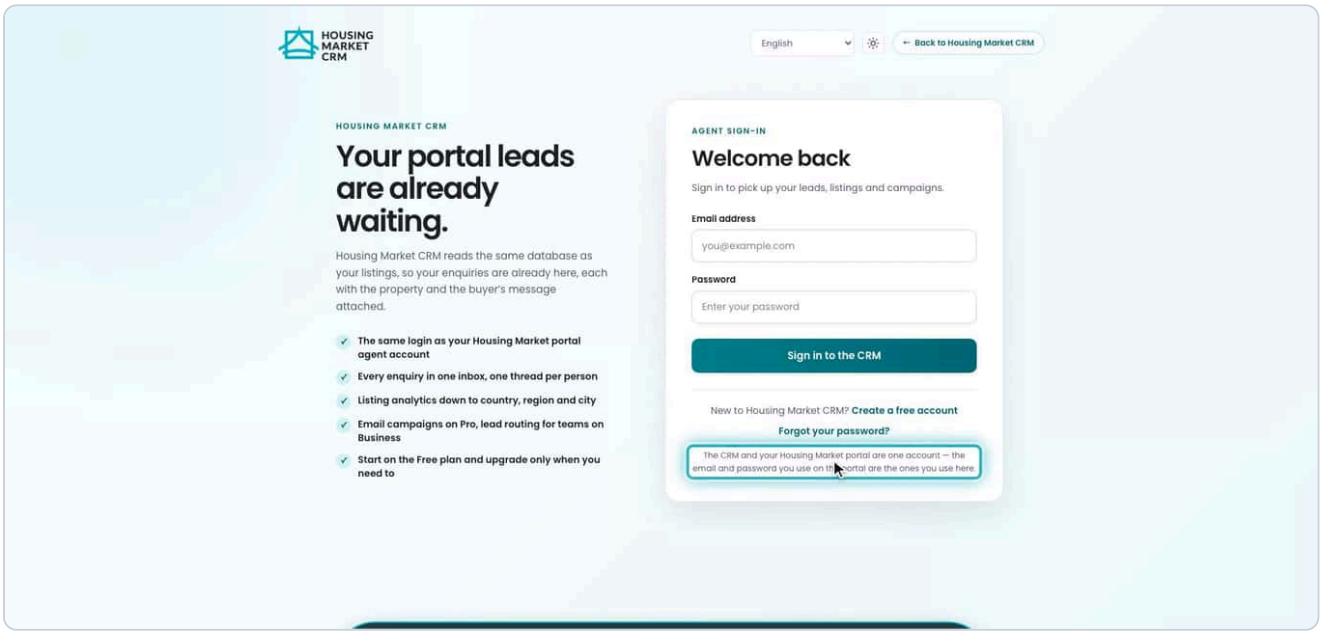


Figure 3.2 · Screen recorded 17 September 2026

3 Enter your **portal email address**.

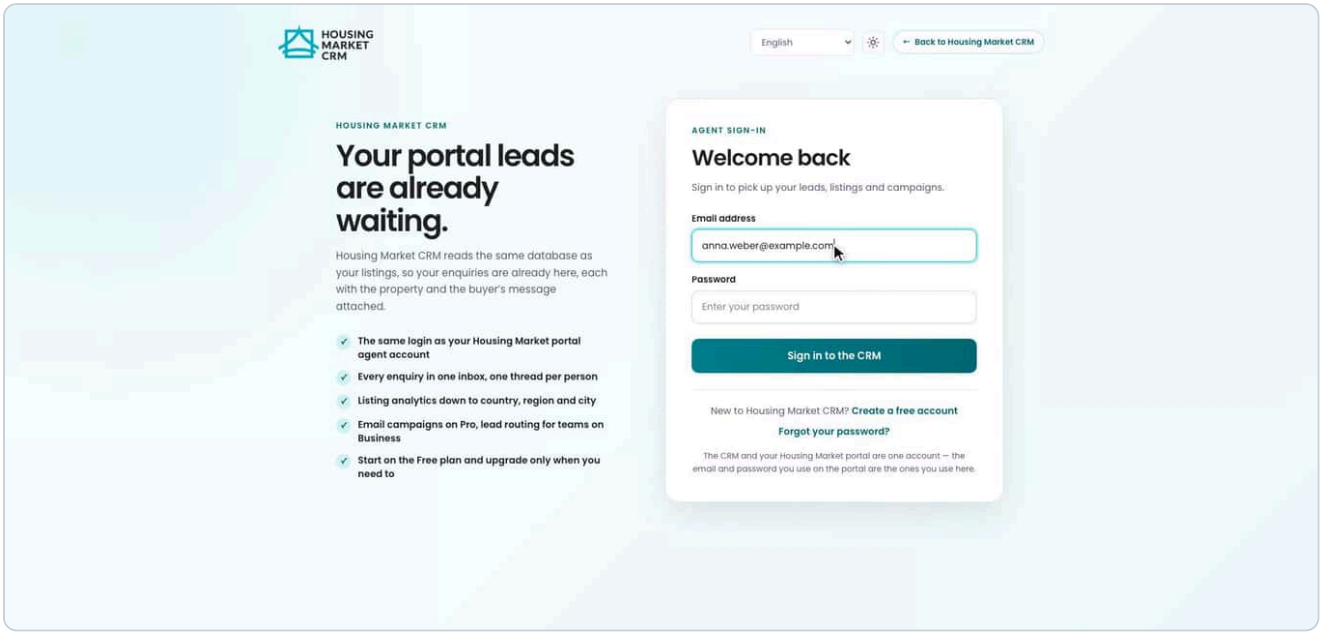


Figure 3.3 · Screen recorded 17 September 2026

4 Enter your **portal password**.

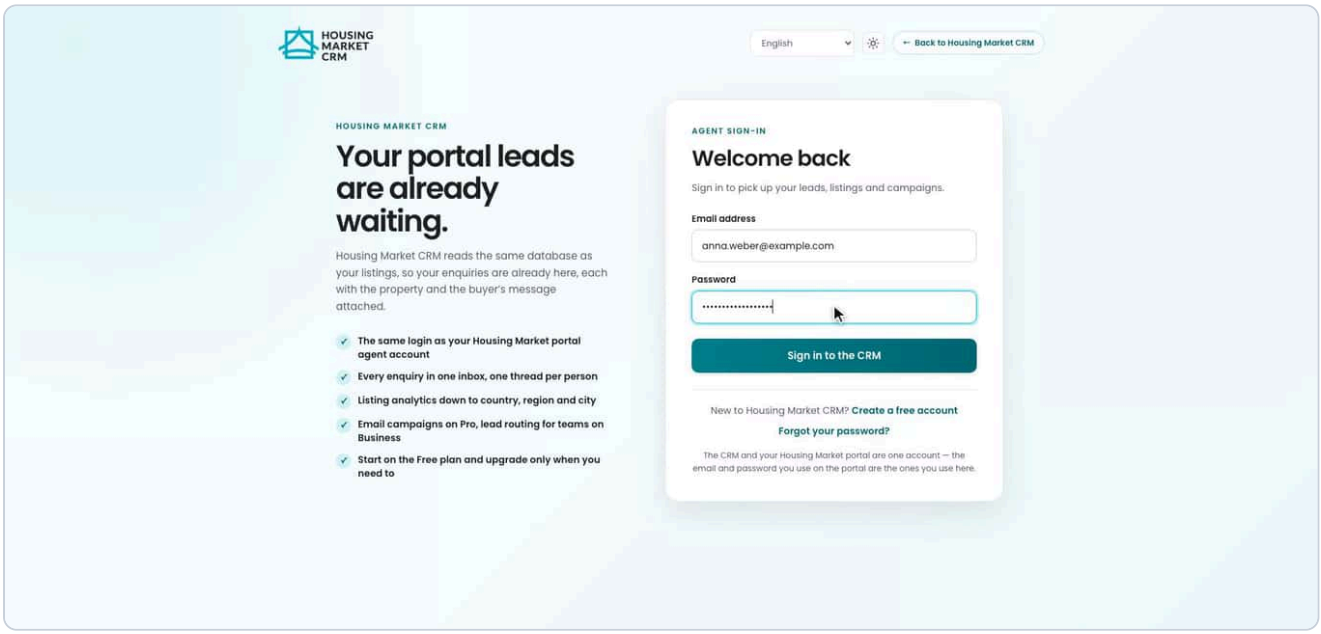


Figure 3.4 · Screen recorded 17 September 2026

5 Forgotten it? Use **Forgot your password?**

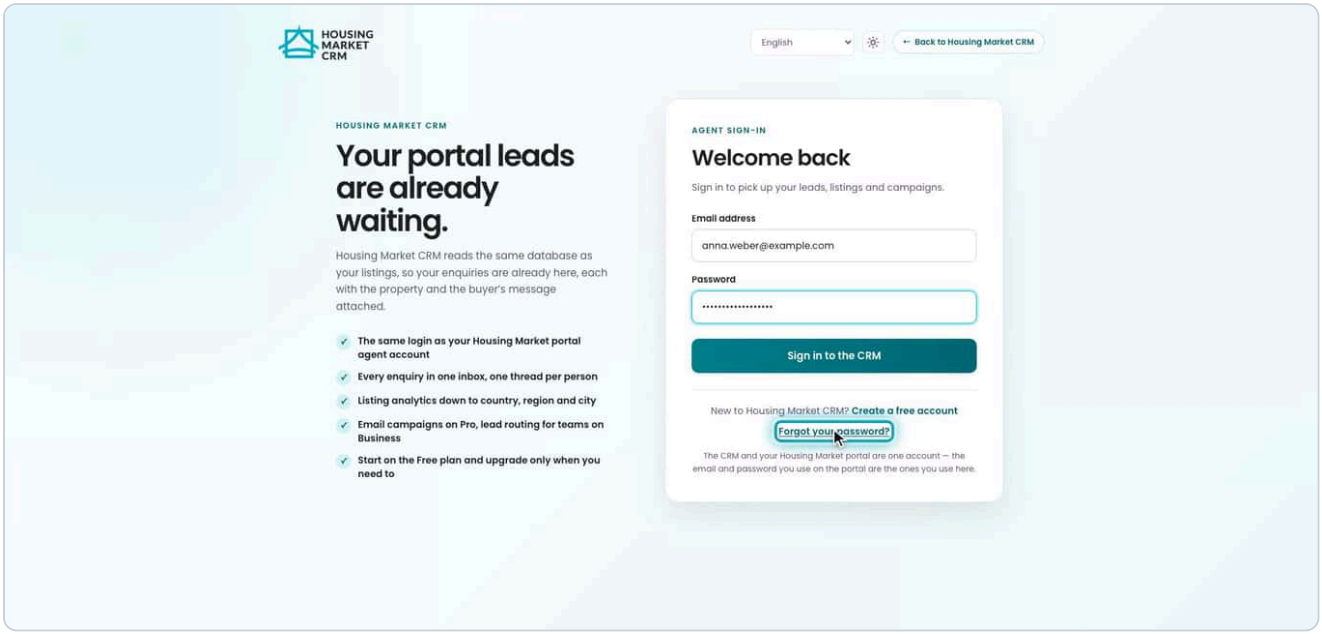


Figure 3.5 · Screen recorded 17 September 2026

6 Click **Sign in to the CRM.**

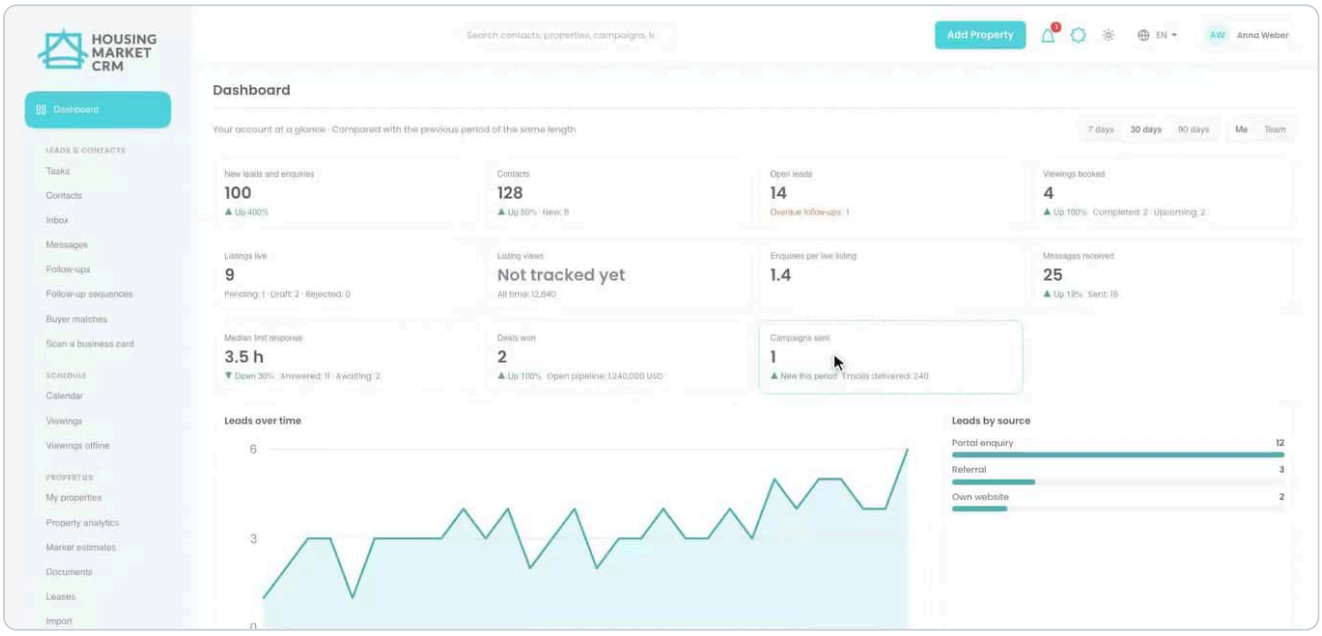


Figure 3.6 · Screen recorded 17 September 2026

7 You are in — your portal enquiries are already **leads**.

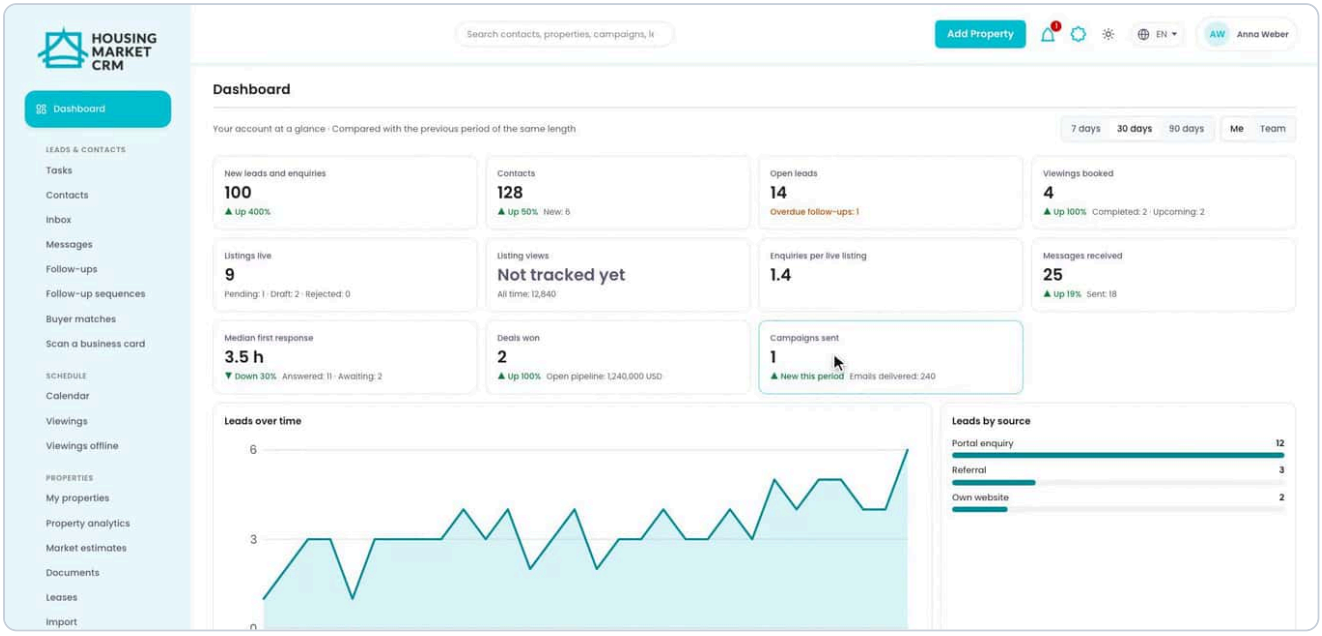


Figure 3.7 · Screen recorded 17 September 2026

GOOD TO KNOW

NOTE

No. One account works for the CRM and the portal. If you already have an agent account on a Housing Market Group portal, log in with it.

Help Center: Do I need a separate CRM account?

RELATED HELP CENTER ARTICLES

How do I reset my Housing Market CRM password?	faq.housingmarketgroup.com/faq/how-do-i-reset-my-password
Can I use Housing Market CRM on my phone?	faq.housingmarketgroup.com/faq/can-i-use-the-crm-on-my-phone

4 CHAPTER 4

Reset your password

All plans | For agents | Watch the video

OVERVIEW

Choose Forgot your password? on the log-in page, enter your email address and use the link we send you. The new password works in the CRM and on your portal.

- On https://dashboard.housingmarketcrm.com/login, choose Forgot your password?.
- Enter the Email address you sign in with and choose Send reset link.
- Open the email "Reset your Housing Market CRM password" and choose Choose a new password.
- Set a New password of at least eight characters, type it again under Confirm new password, and choose Save new password.
- Choose Sign in and log in with the new password.

There is no code to type. The link works once and expires after 24 hours, and asking for a new one cancels the earlier links. Opening it also confirms your email address if you had not done so. For your privacy the page gives the same answer whether or not the address has an account, so if nothing arrives, check your spam folder and the spelling of the address. After several attempts in a row you are asked to wait a few minutes.

The CRM and your Housing Market portal are one account, so this changes the password for both. The email is written in the language you use the CRM in.

From the Help Center: **How do I reset my Housing Market CRM password?**

STEP BY STEP

1 On the sign-in page, click **Forgot your password?**

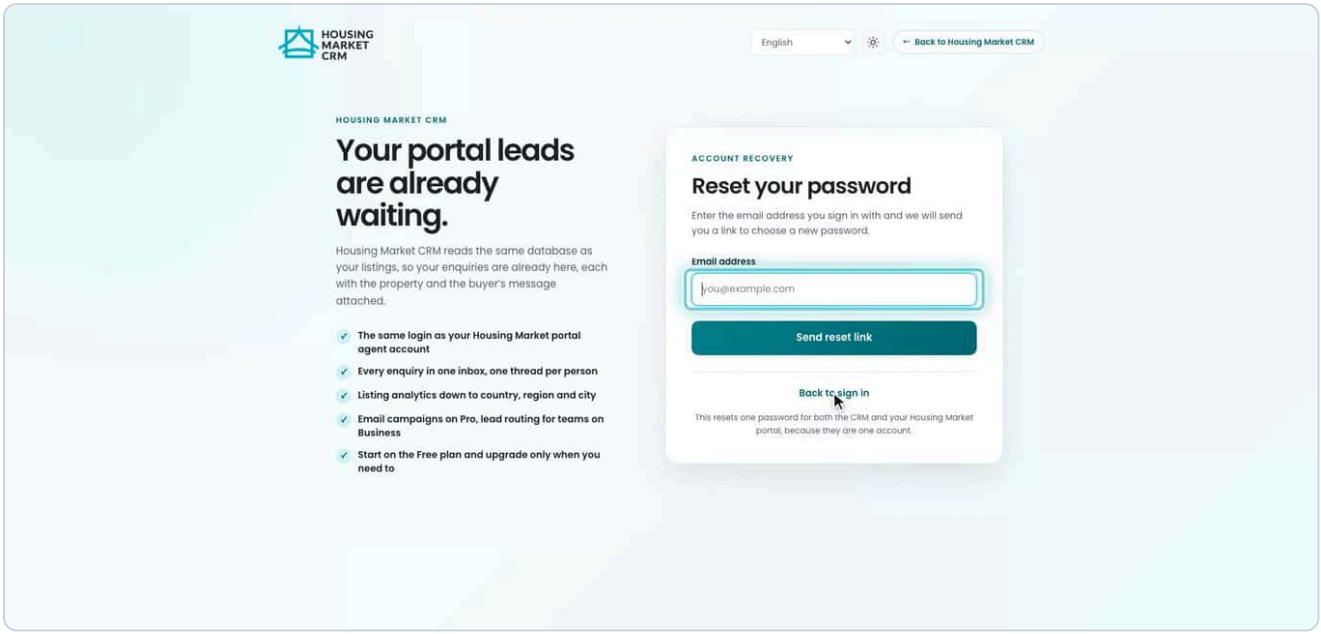


Figure 4.1 · Screen recorded 17 September 2026

2 Enter the **email address** of your account.

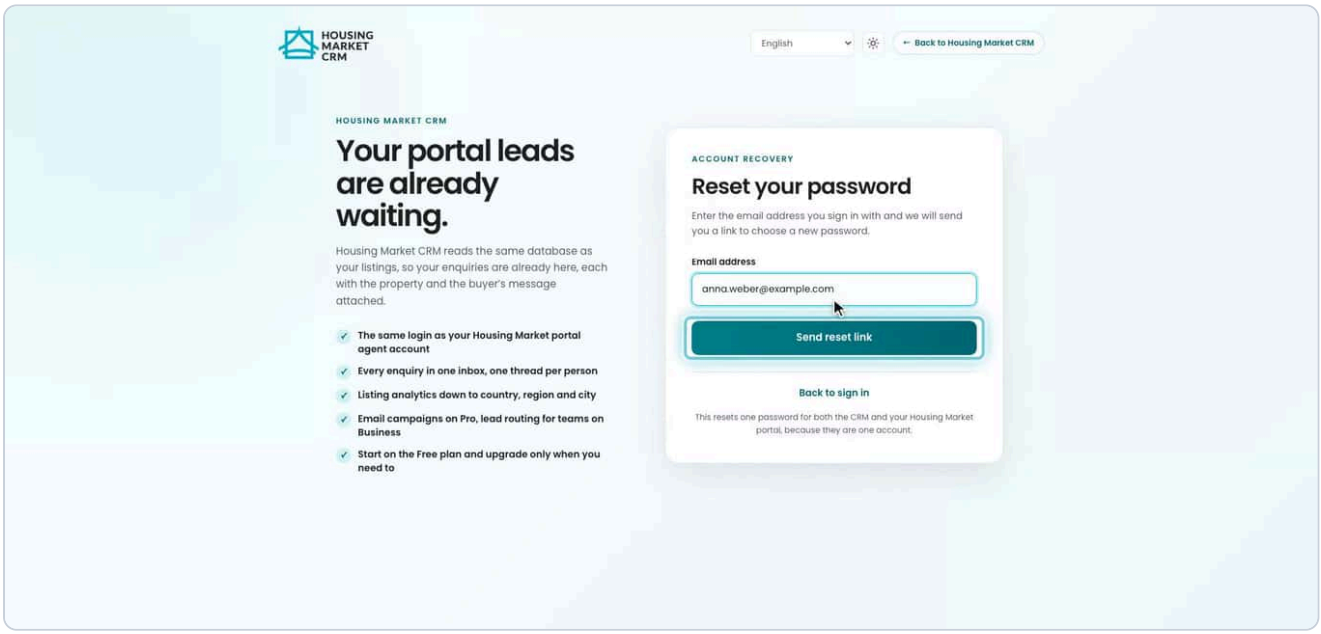


Figure 4.2 · Screen recorded 17 September 2026

3 Click **Send reset link**.

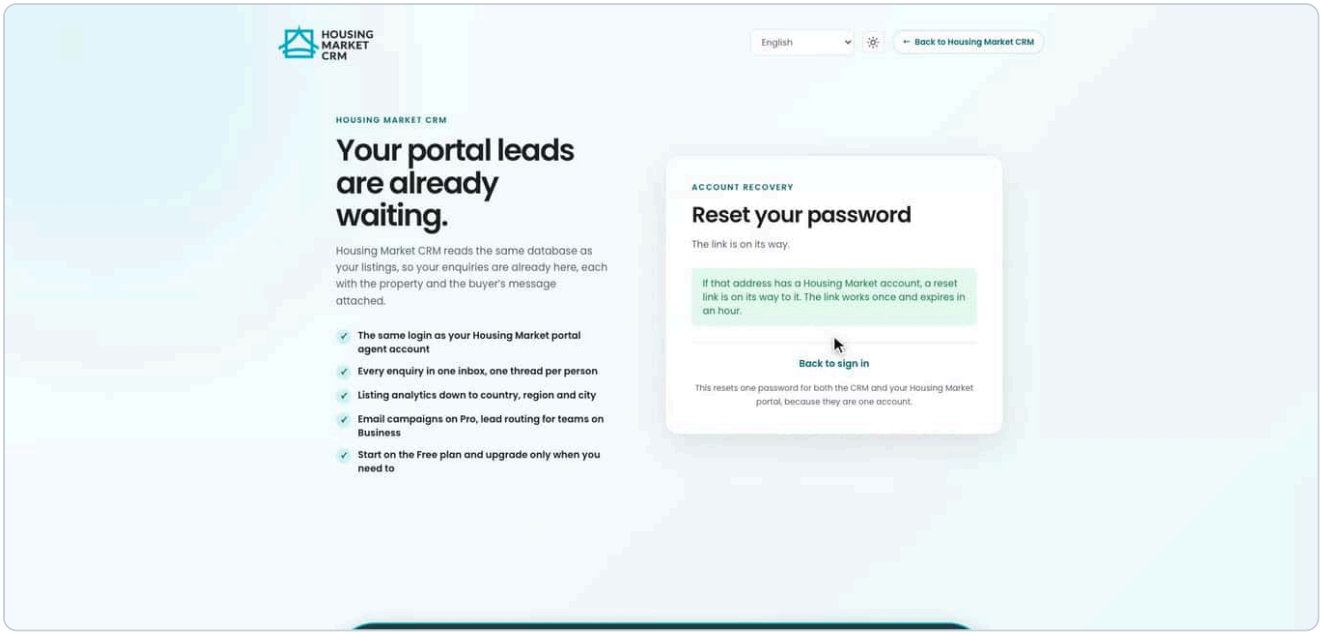


Figure 4.3 · Screen recorded 17 September 2026

4 If the address has an account, a **reset link** is on its way.

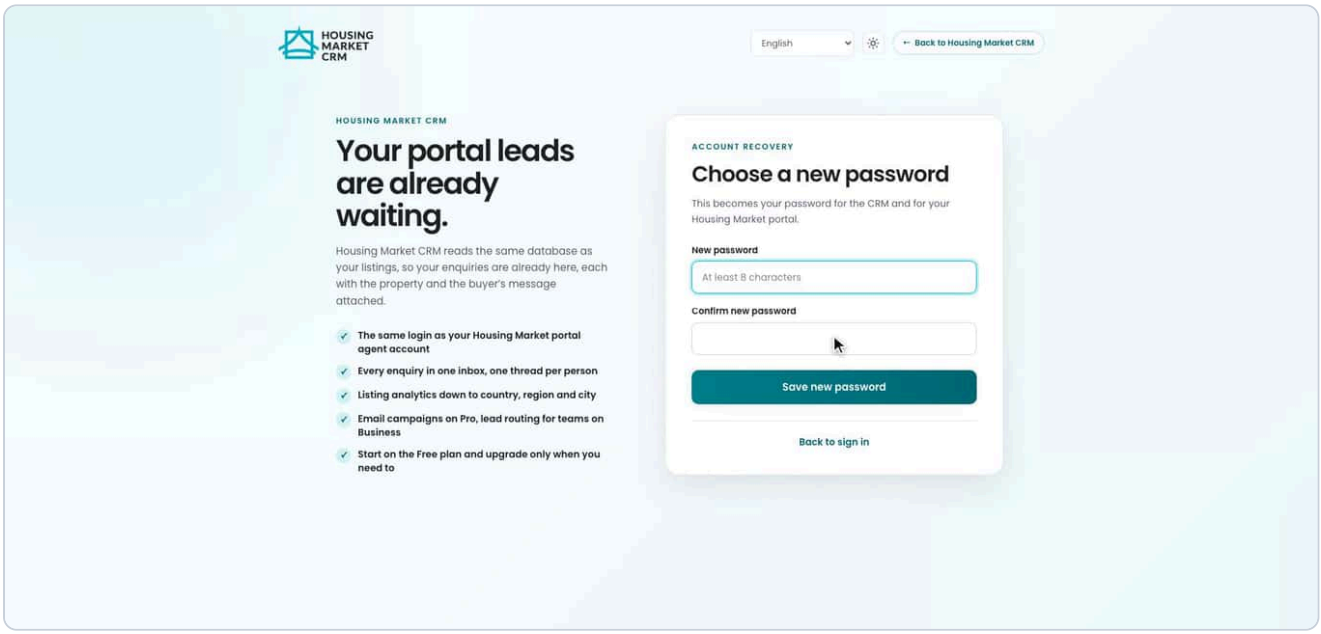


Figure 4.4 · Screen recorded 17 September 2026

5 Open the link from the email.

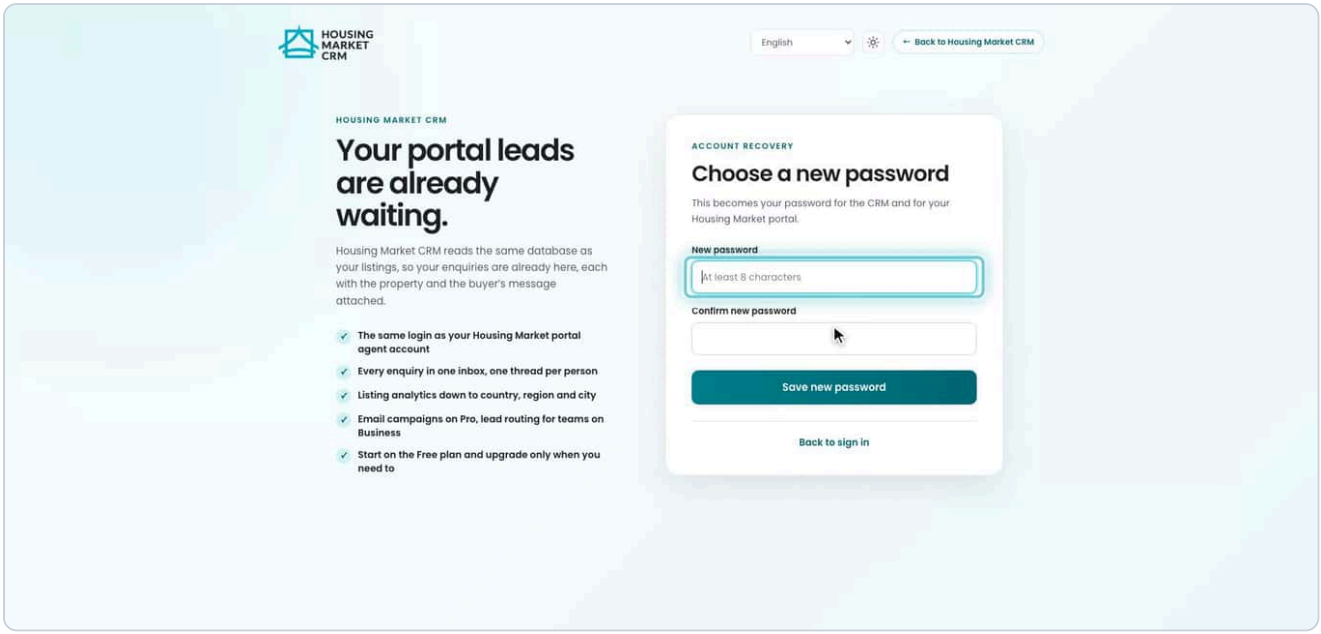


Figure 4.5 · Screen recorded 17 September 2026

6 Type a **new password** — at least 8 characters.

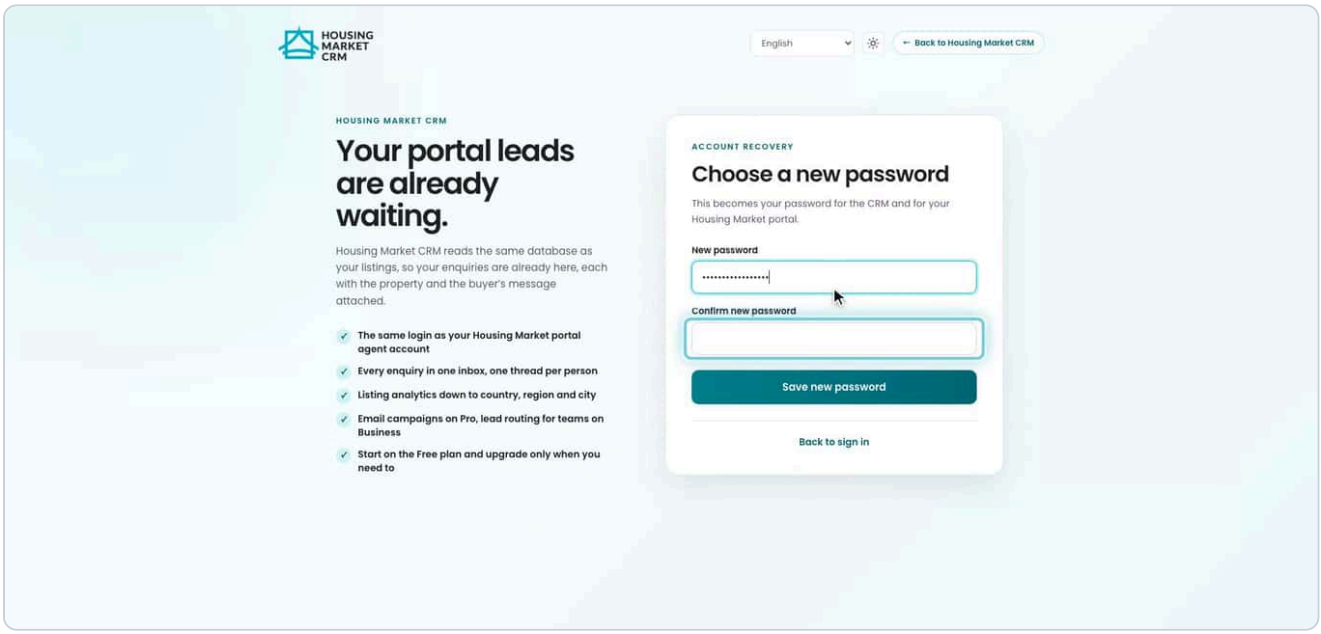


Figure 4.6 · Screen recorded 17 September 2026

7 Type it again to **confirm**.

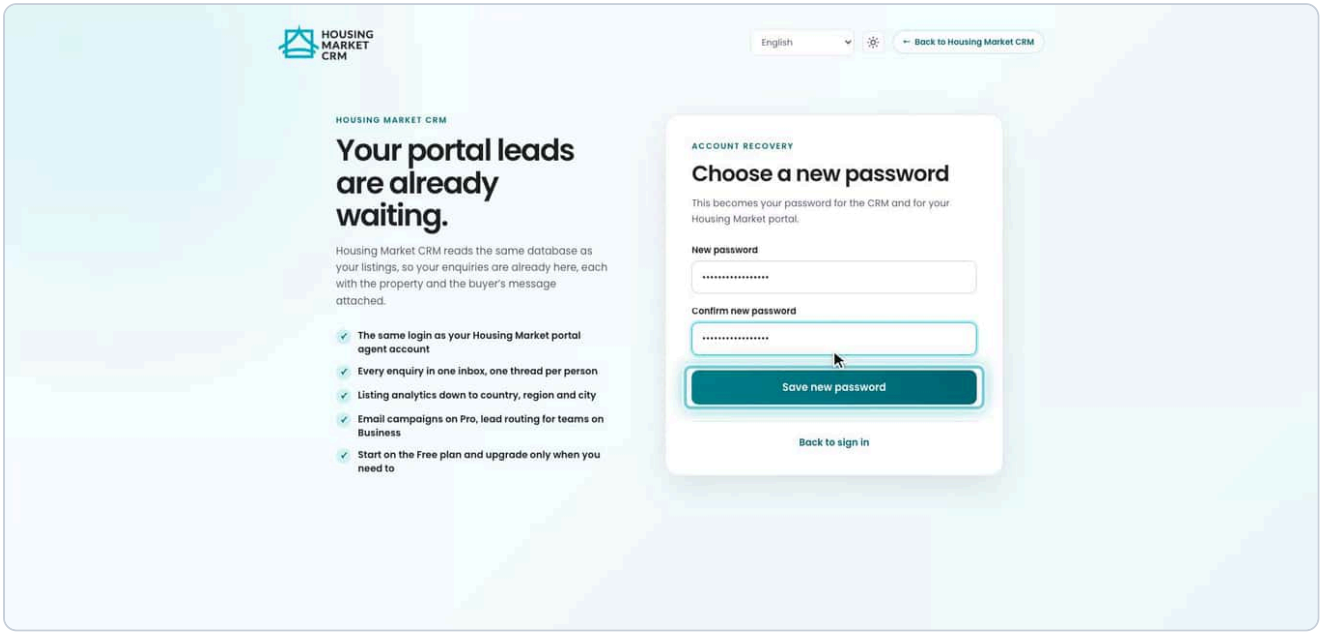


Figure 4.7 · Screen recorded 17 September 2026

8 Click **Save new password**.

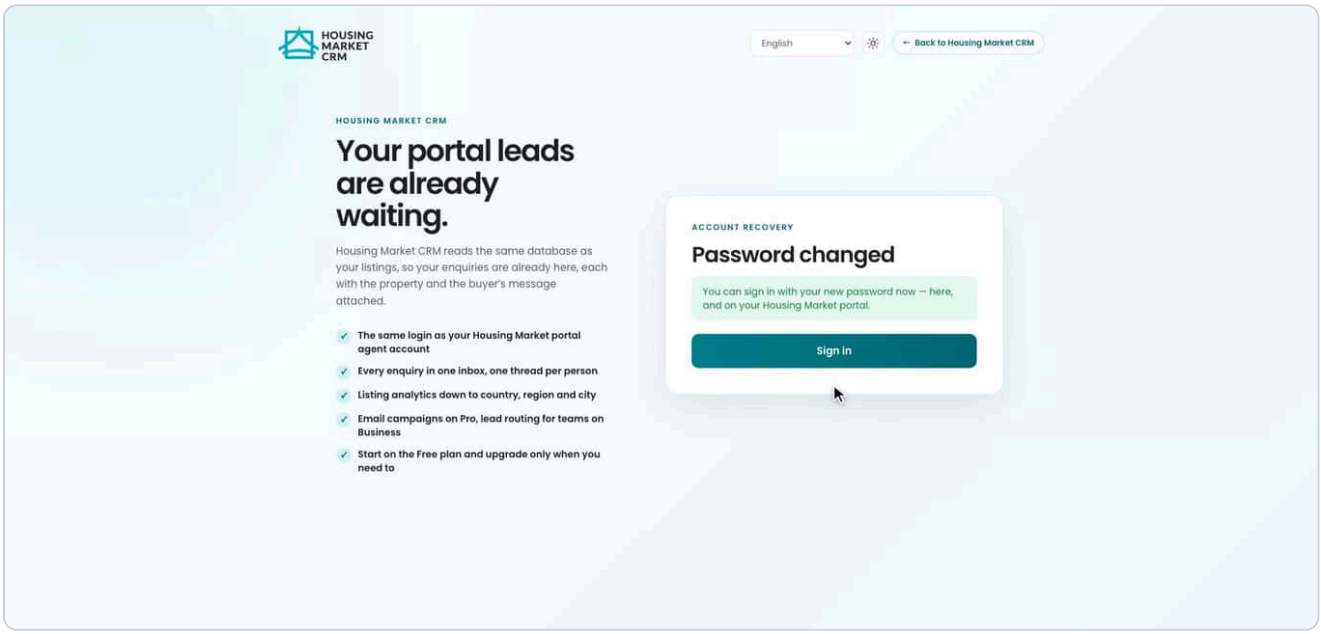


Figure 4.8 · Screen recorded 17 September 2026

9 **Password changed** — it works on your portal too.

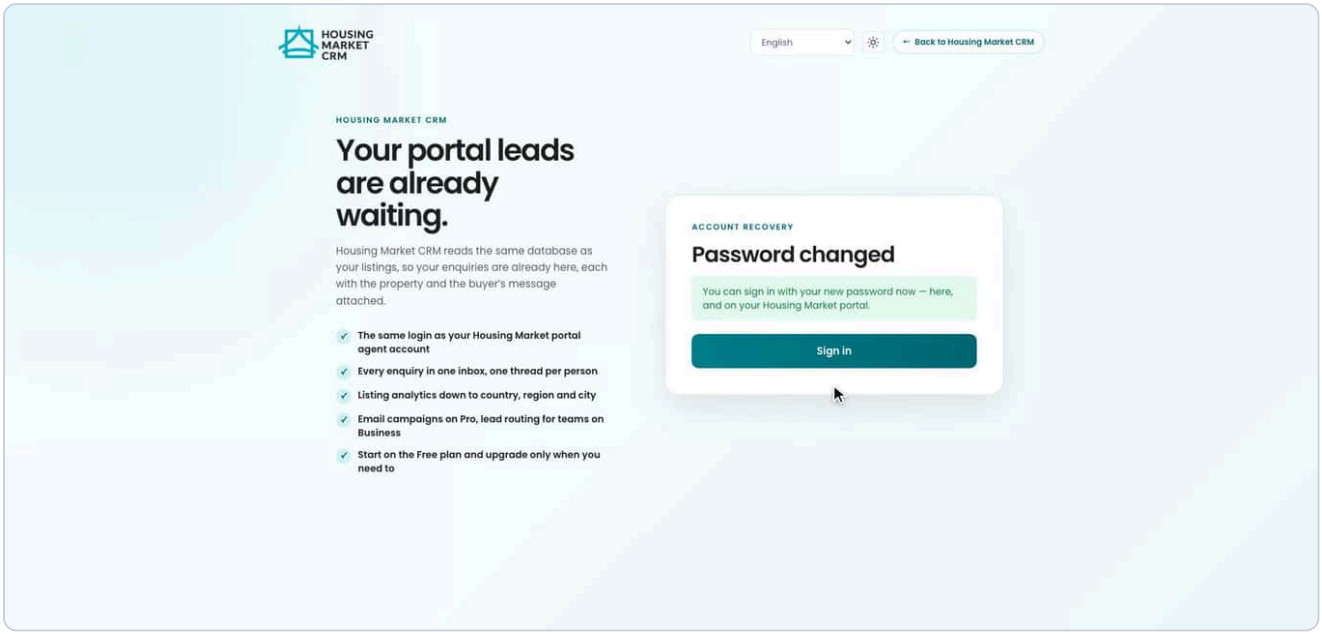


Figure 4.9 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

How do I log in to Housing Market CRM?	faq.housingmarketgroup.com/faq/how-do-i-log-in-to-housing-market-crm

5 CHAPTER 5

Your dashboard

All plans | For agents | Watch the video

OVERVIEW

The overview dashboard shows how your account is doing over the last 7, 30 or 90 days — enquiries, leads, listing views and what needs you next — each compared with the period before. It is free.

The dashboard is the first screen after you log in. Choose the last 7, 30 or 90 days and it shows how your account did in that time, with each figure compared with the period before, so you can see at a glance whether things are moving up or down.

- Enquiries on your portal listings, and the leads they became
- Views of your listings
- The viewings and follow-ups due in the next seven days
- On Pro and Business, response times, deals and campaign results — on the free plan those sections show what they would add

The figures come from the portal as well as from the CRM, so an agent who works enquiries on the portal still sees real numbers rather than a page of zeros. Each enquiry is counted once. On Business, managers and administrators can switch between their own figures and the team's.

From the Help Center: **What does the dashboard show?**

STEP BY STEP

1 This is your **Housing Market CRM** dashboard.

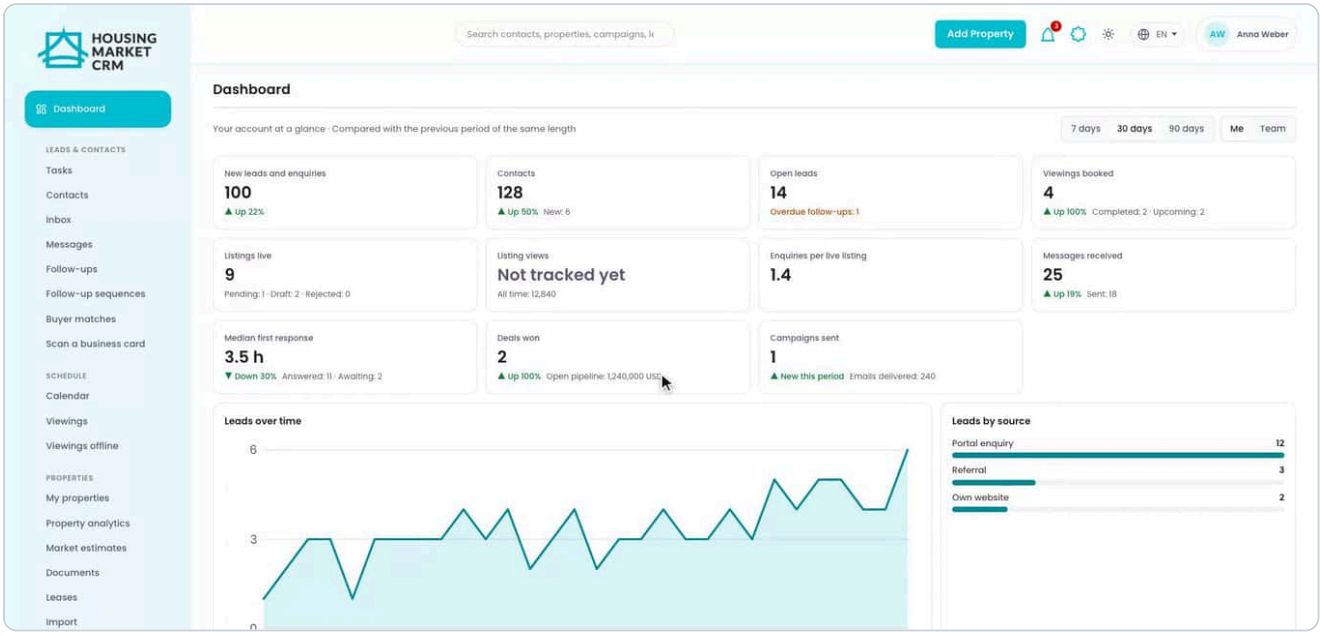


Figure 5.1 · Screen recorded 24 September 2026

2 Switch the period — **7**, **30** or **90 days**.

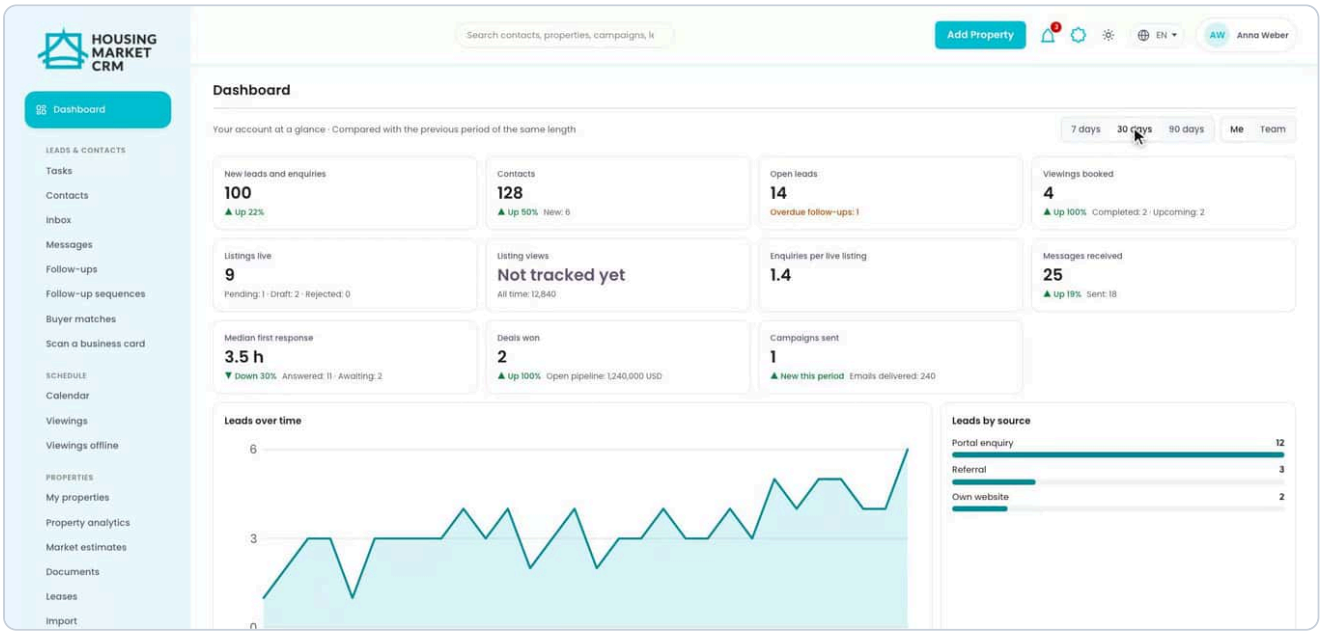


Figure 5.2 · Screen recorded 24 September 2026

3 **New leads and enquiries**, compared with the previous period.

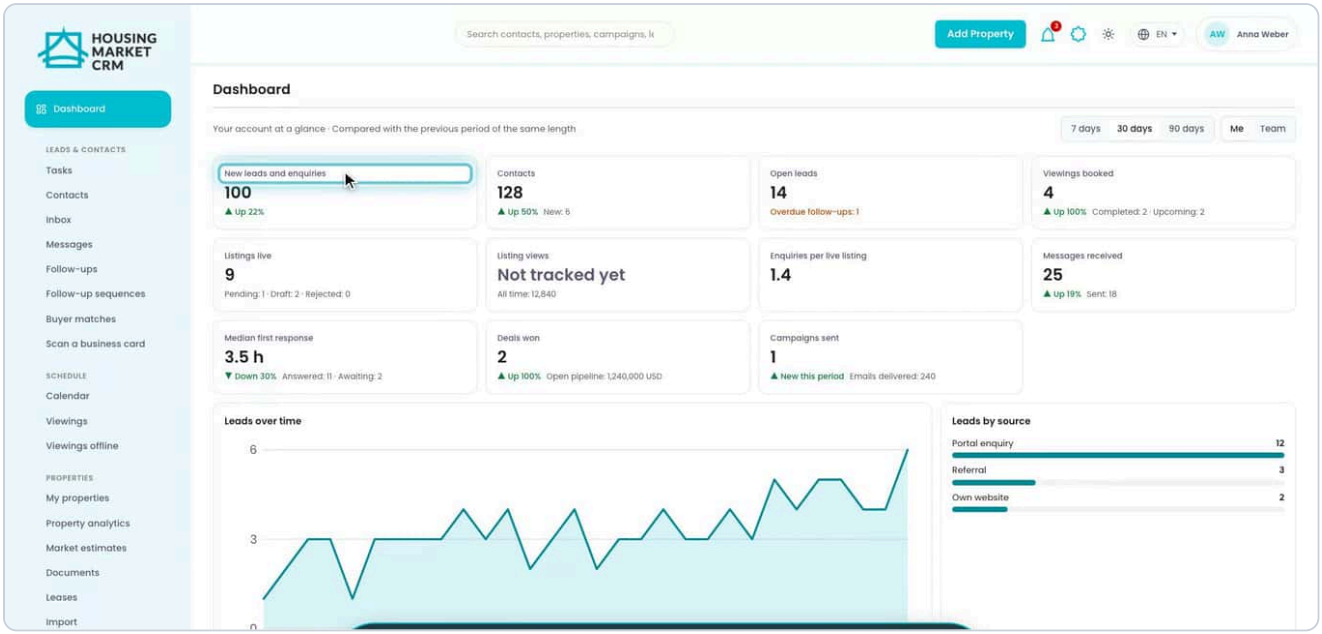


Figure 5.3 · Screen recorded 24 September 2026

4 **Open leads** and **overdue follow-ups** need your attention.

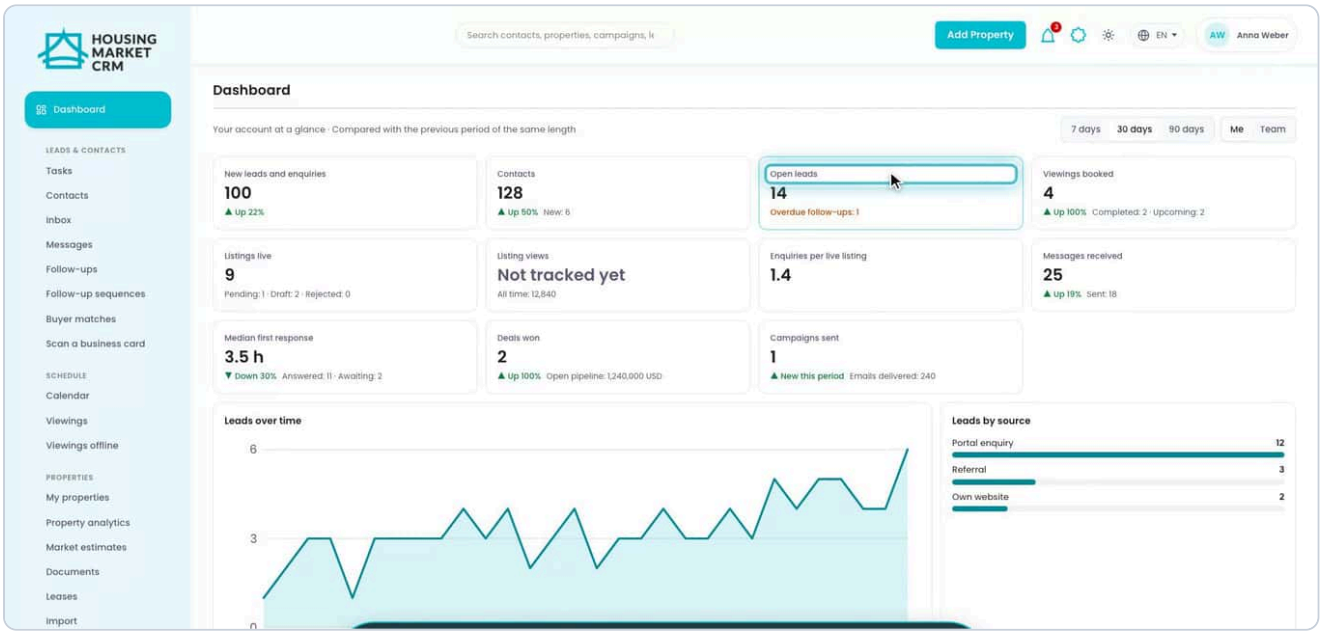


Figure 5.4 · Screen recorded 24 September 2026

5 **Median first response** shows how fast you answer.

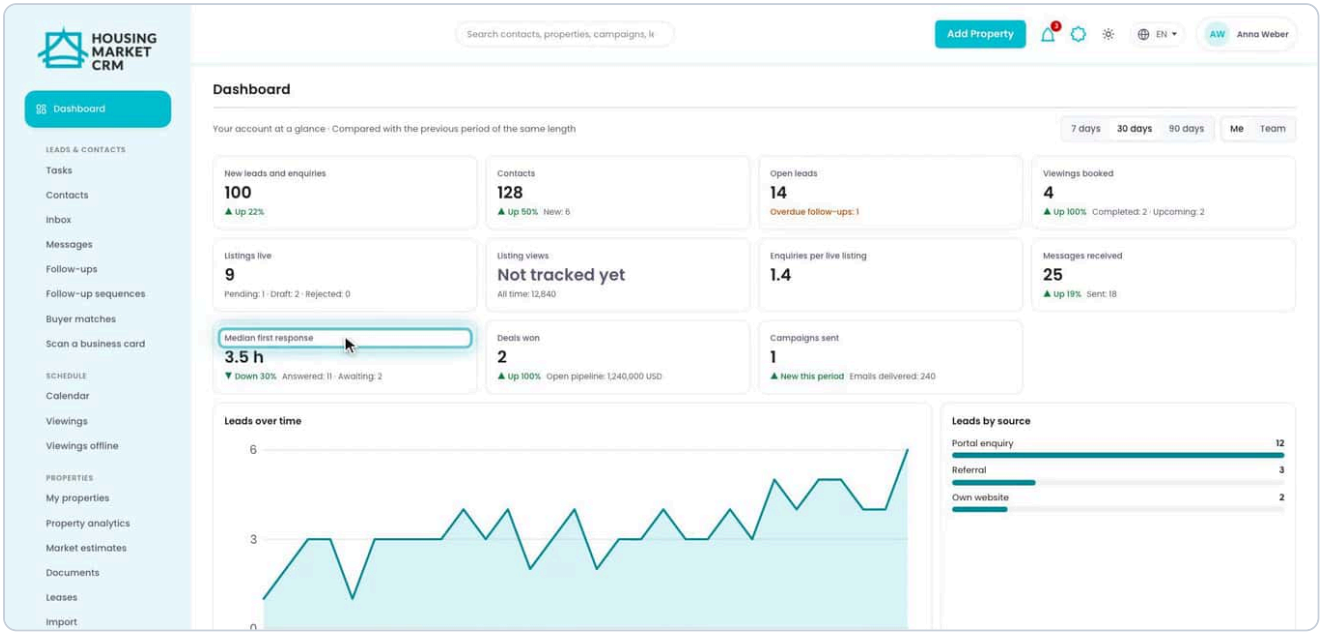


Figure 5.5 · Screen recorded 24 September 2026

6 **Leads over time** and **Leads by source**.

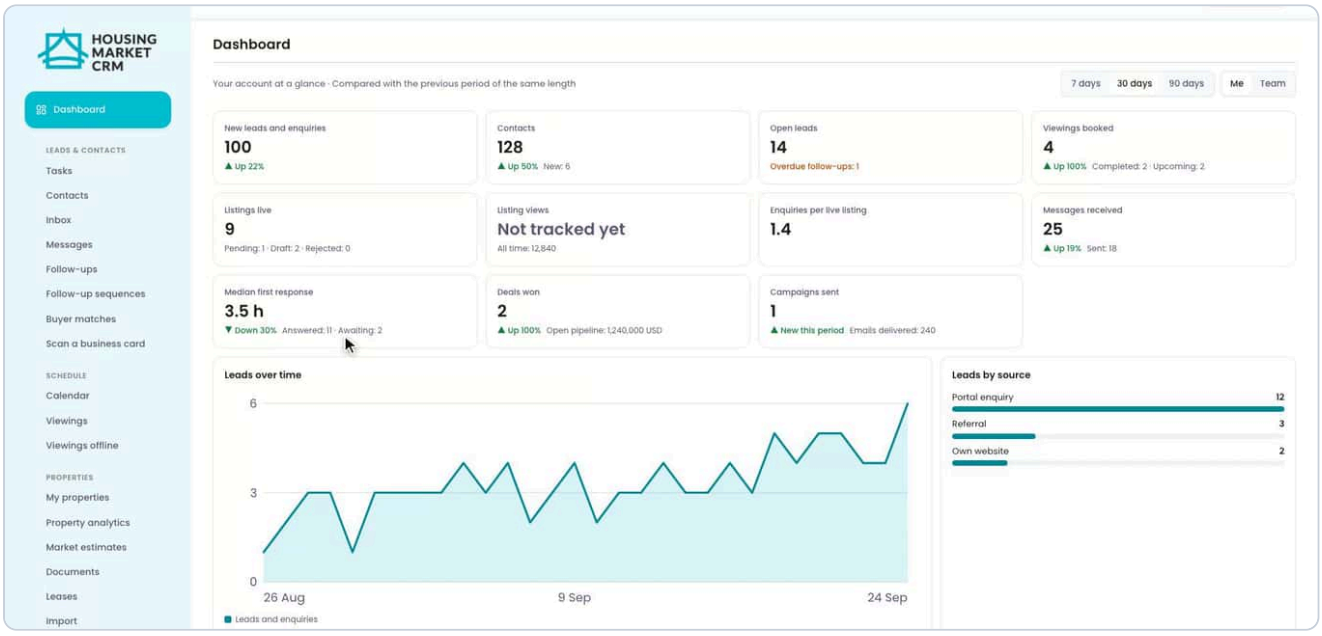


Figure 5.6 · Screen recorded 24 September 2026

7 **Pipeline by stage** shows where your leads are.

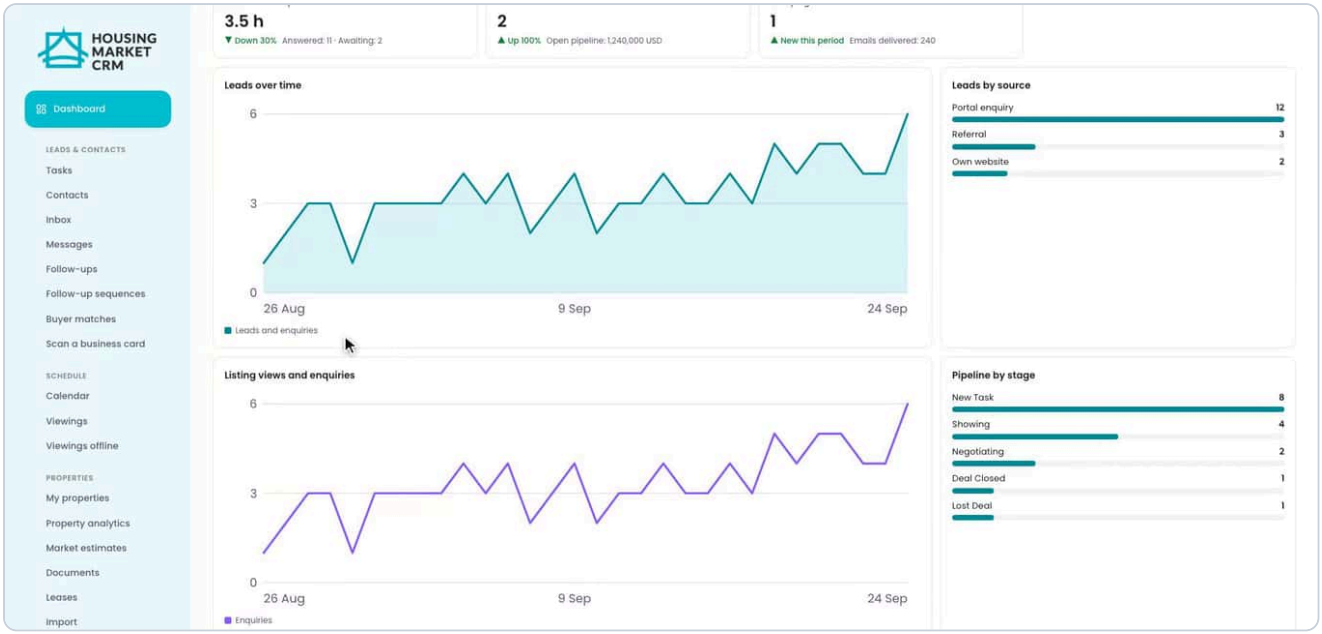


Figure 5.7 · Screen recorded 24 September 2026

8 **Next 7 days** lists viewings and follow-ups.

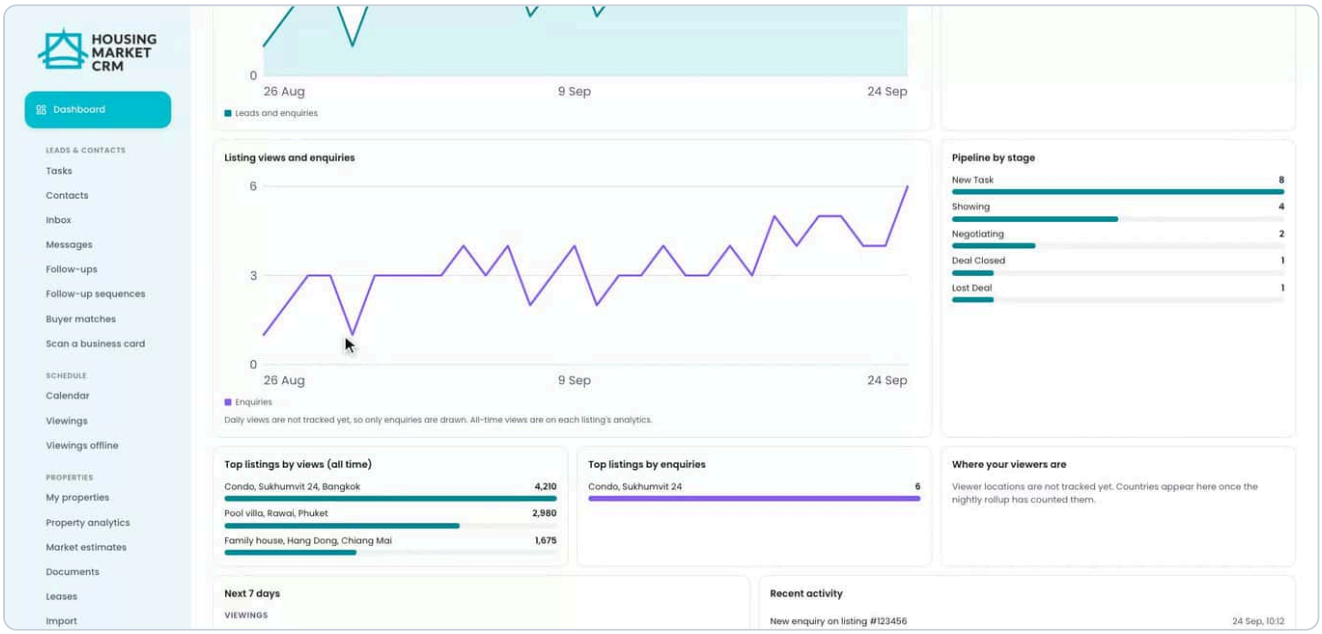


Figure 5.8 · Screen recorded 24 September 2026

9 The **left menu** groups leads, schedule, properties, marketing and team.

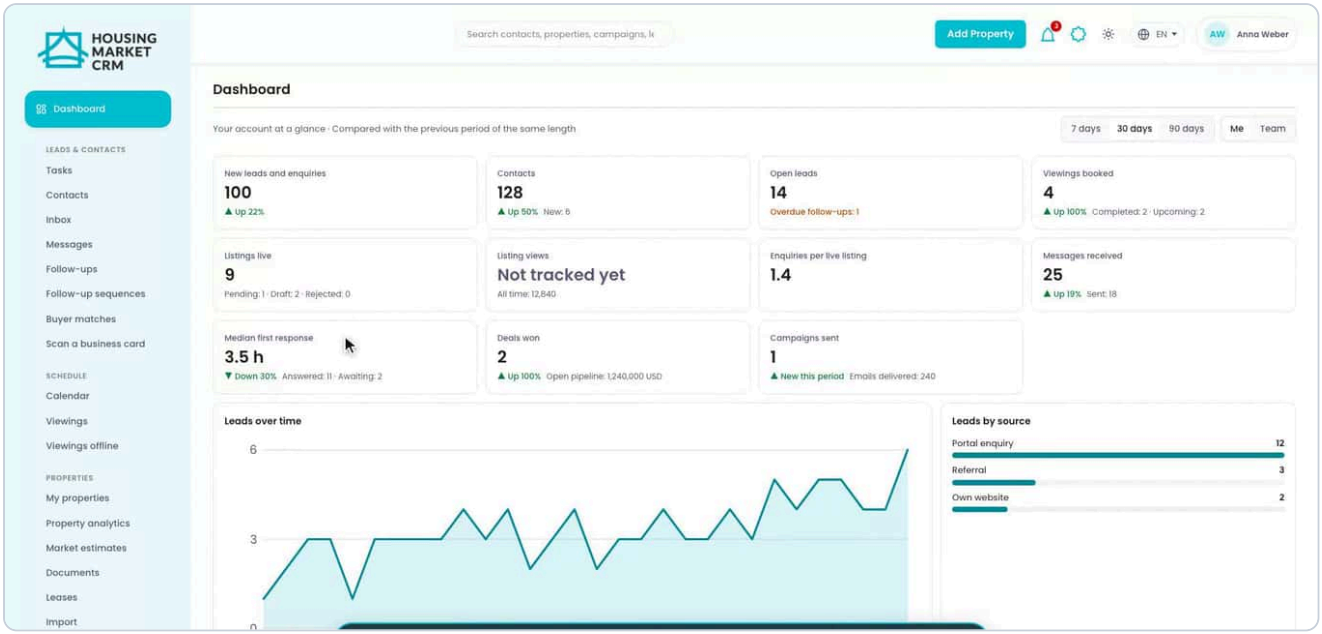


Figure 5.9 · Screen recorded 24 September 2026

10 Use **Add Property** at the top to list a new home.

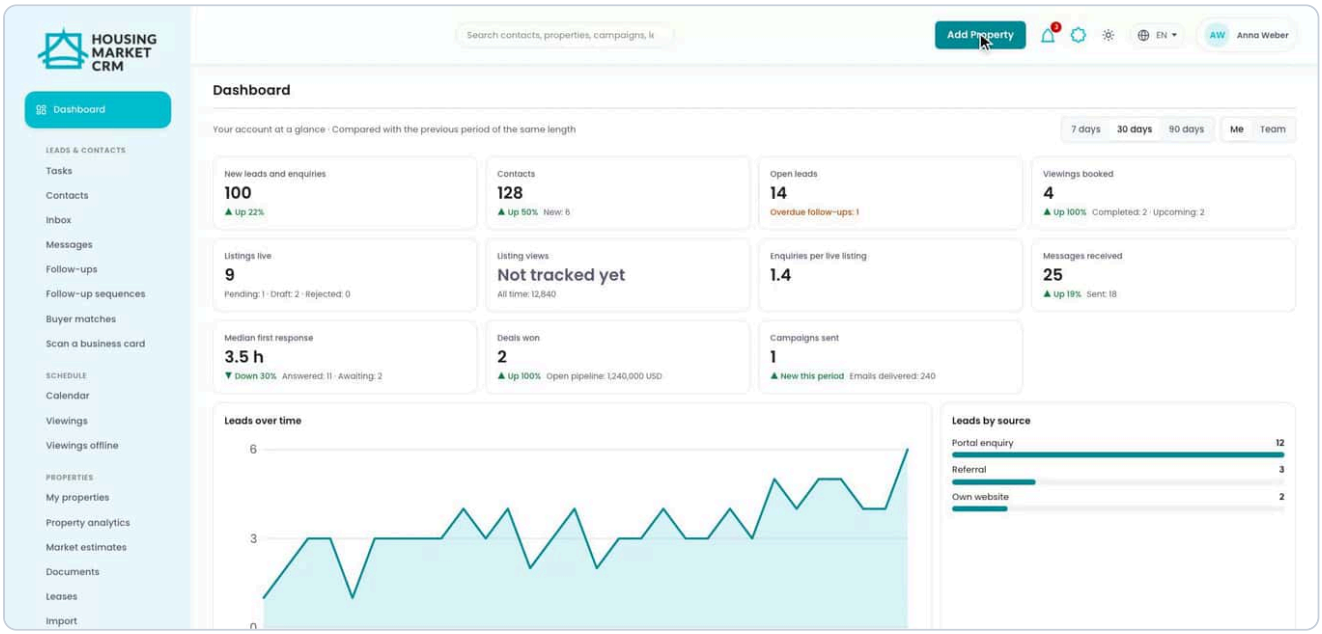


Figure 5.10 · Screen recorded 24 September 2026

GOOD TO KNOW

TIP

On every plan, prompts for listings that are underperforming and district market cards. On Pro, the contacts who look ready to buy or rent, and market cards you can email to a client.

Help Center: What are the Housing Market Insights recommendations in the CRM?

RELATED HELP CENTER ARTICLES

What is Housing Market CRM?	faq.housingmarketgroup.com/faq/what-is-housing-market-crm
Can I use Housing Market CRM on my phone?	faq.housingmarketgroup.com/faq/can-i-use-the-crm-on-my-phone

6 CHAPTER 6

Update your profile

All plans | For agents | Watch the video

OVERVIEW

Choose Settings (the gear) and then My profile. Your name, display name, company, phone numbers, language and photo are kept in one profile that every Housing Market product reads.

On a computer, choose Settings (the gear) at the top of the screen and then My profile.

This is one profile across Housing Market: what you save here also applies in the portal, in Housing Market Ads and in the other Housing Market products, so there is no second copy to keep in step.

What you can change

- First name and last name.
- Display name — the name shown on your listings and in emails. Leave it empty to use your first and last name.
- Company.
- Phone and mobile — digits, spaces, brackets, dots and dashes, with an optional leading +.
- Language — your dashboard, the emails we send you and your invoices all use it, in every Housing Market product.

Choose Save changes when you are done. If the profile was changed somewhere else at the same moment, the page asks you to reload and try again rather than overwriting the other change.

Your photo

Under Profile photo, choose Change photo and pick a JPEG, PNG or WebP image of up to 5 MB. It is shown on your listings, on your public profile page and in emails to your clients.

Your email address

Your sign-in email is shown on the page, but it cannot be changed there. It is the address of the agent account you share with the portal.

If the page cannot be edited

If My profile says your profile cannot be edited here yet, it is showing your details as they are currently stored and cannot save a change for now. If it says your profile cannot be saved right now, try again later; nothing has been changed.

From the Help Center: **How do I update my profile?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

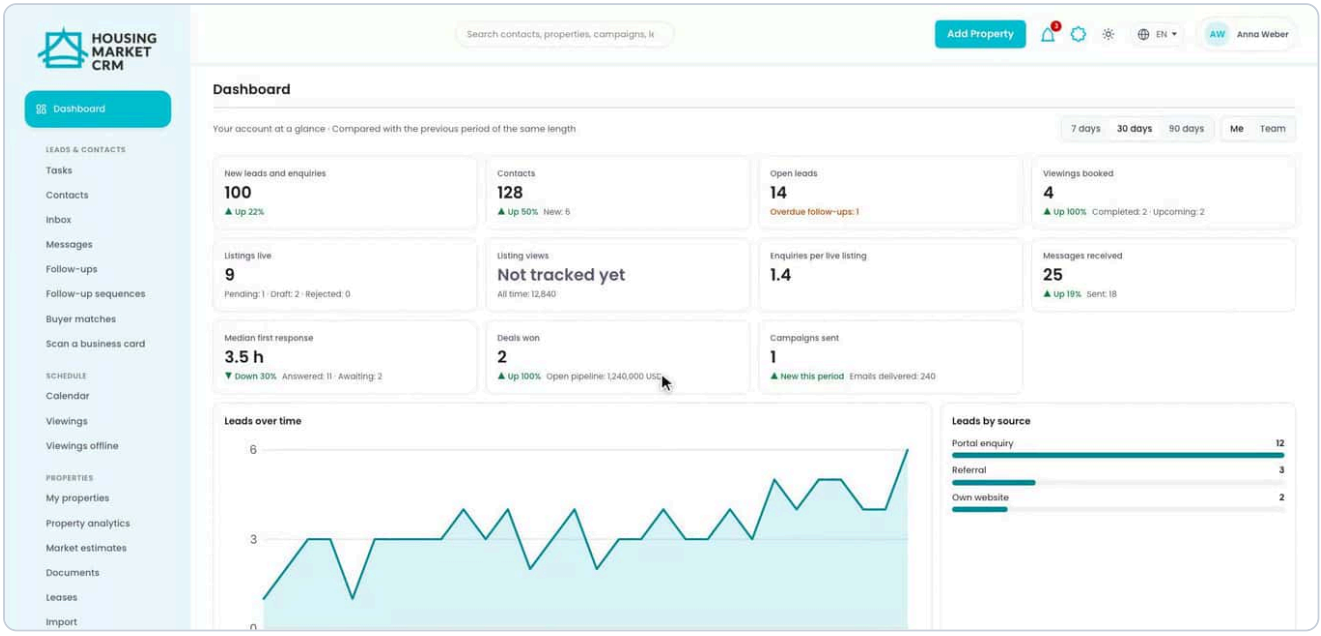


Figure 6.1 · Screen recorded 24 September 2026

2 Click the **Settings** icon at the top.

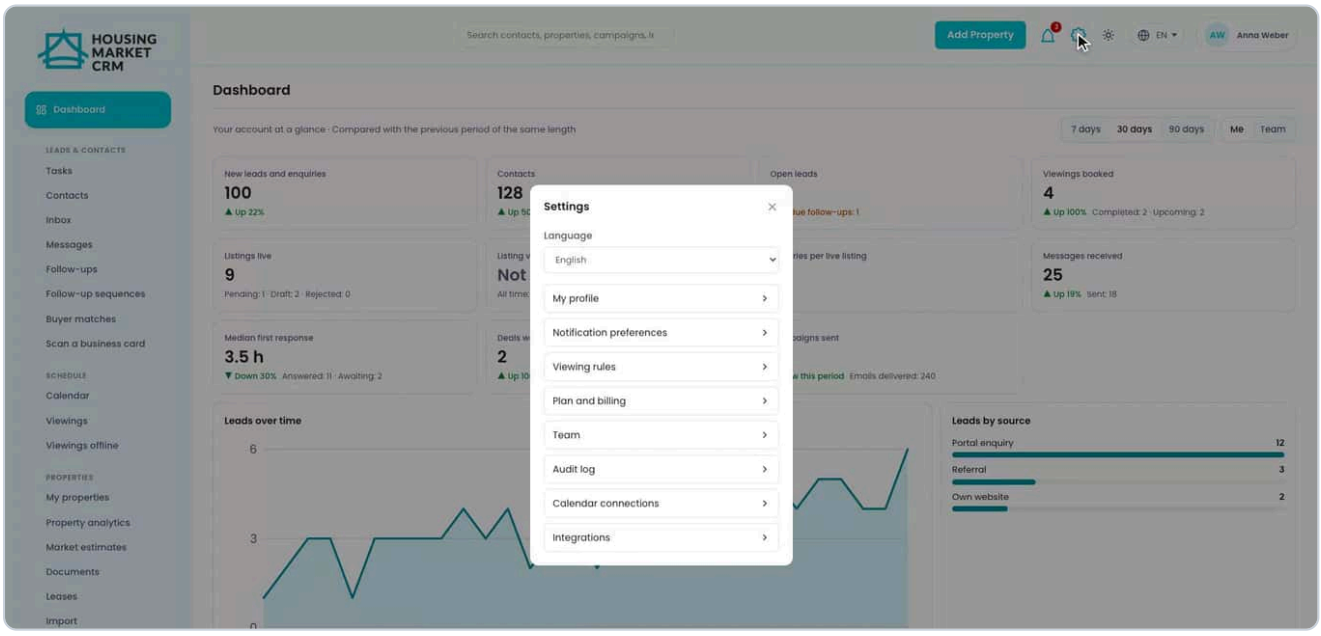


Figure 6.2 · Screen recorded 24 September 2026

3 Choose **My profile**.

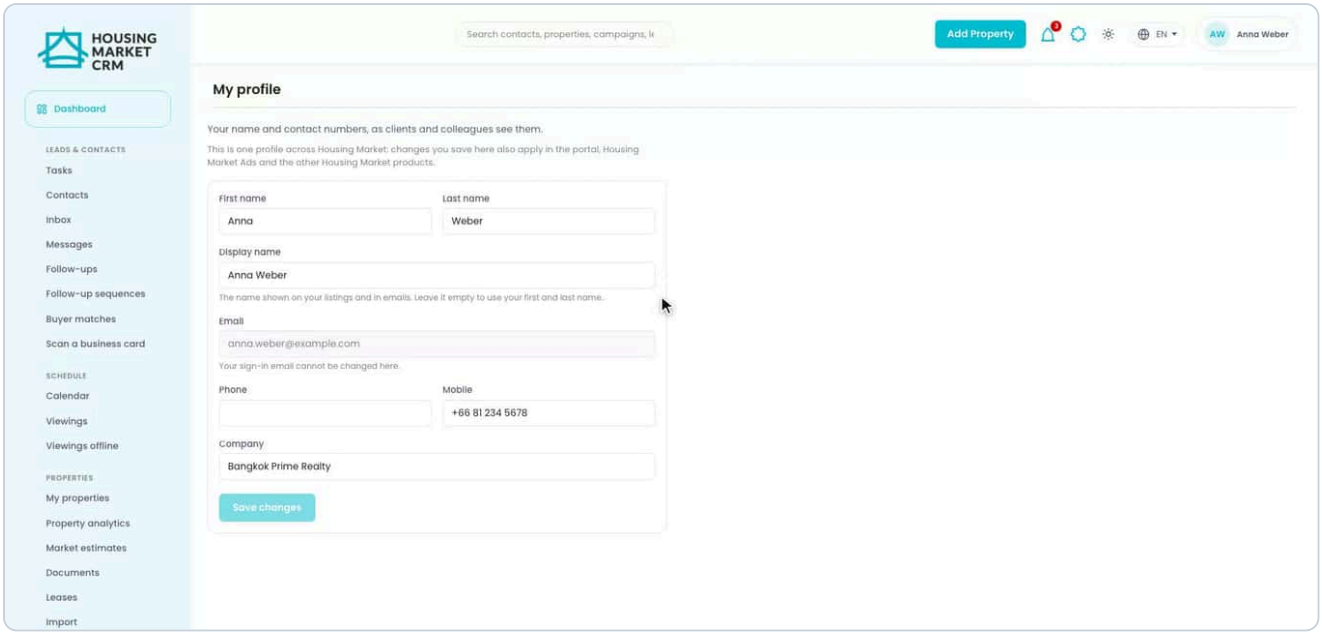


Figure 6.3 · Screen recorded 24 September 2026

4 One profile, read by **every Housing Market product**.

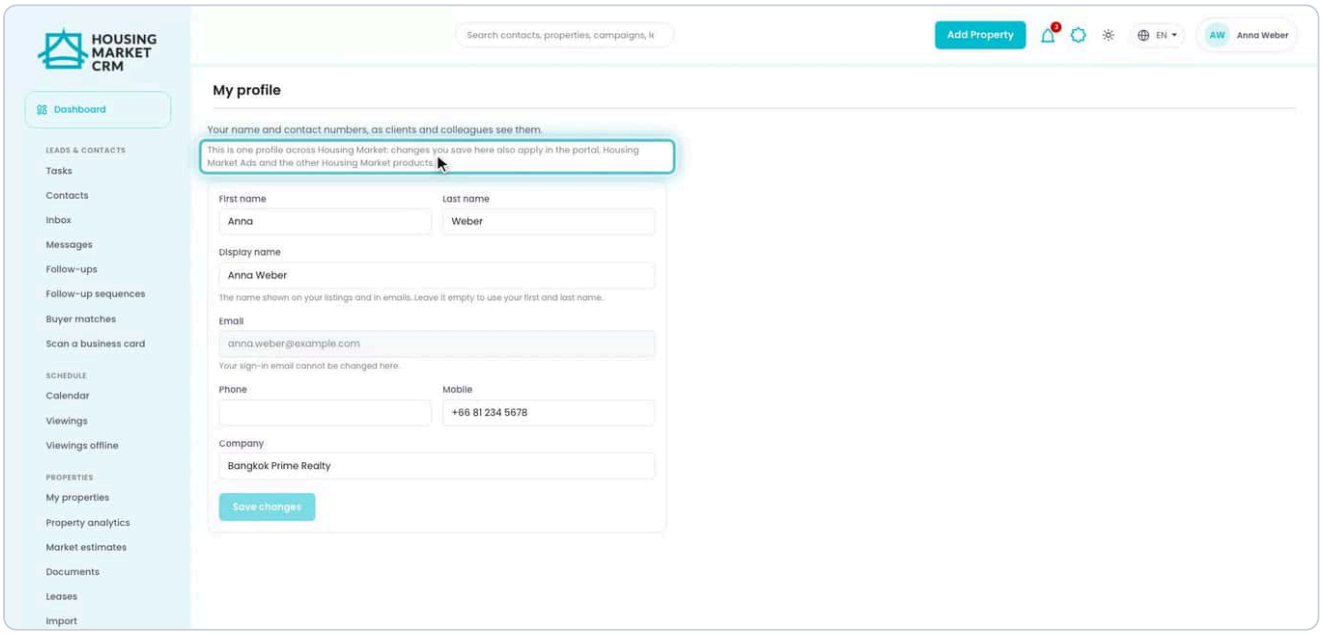


Figure 6.4 · Screen recorded 24 September 2026

5 Your **first name.**

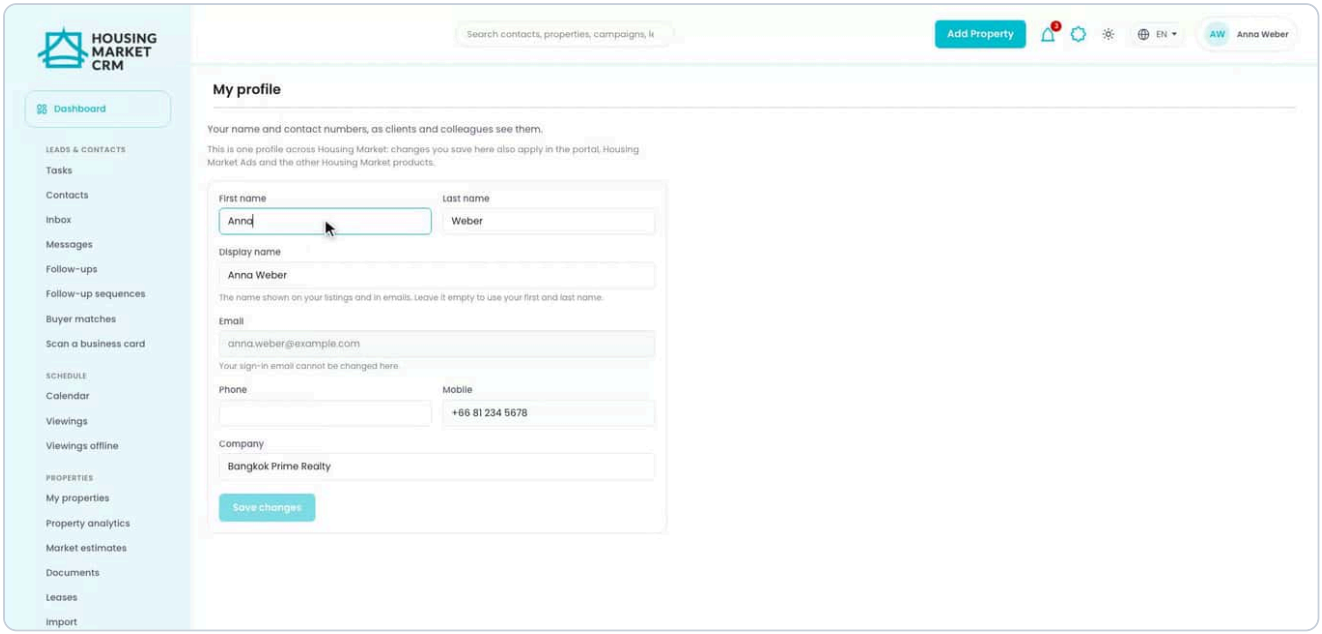


Figure 6.5 · Screen recorded 24 September 2026

6 Your **last name.**

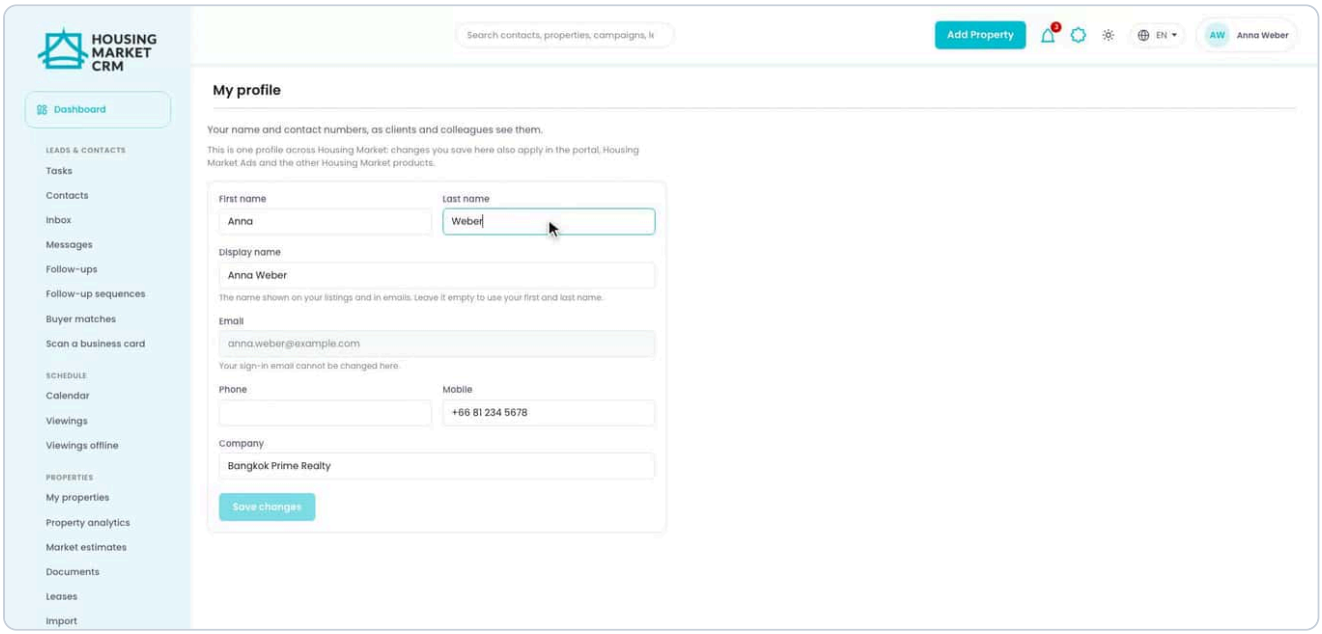


Figure 6.6 · Screen recorded 24 September 2026

7 The **display name** clients read on your listings.

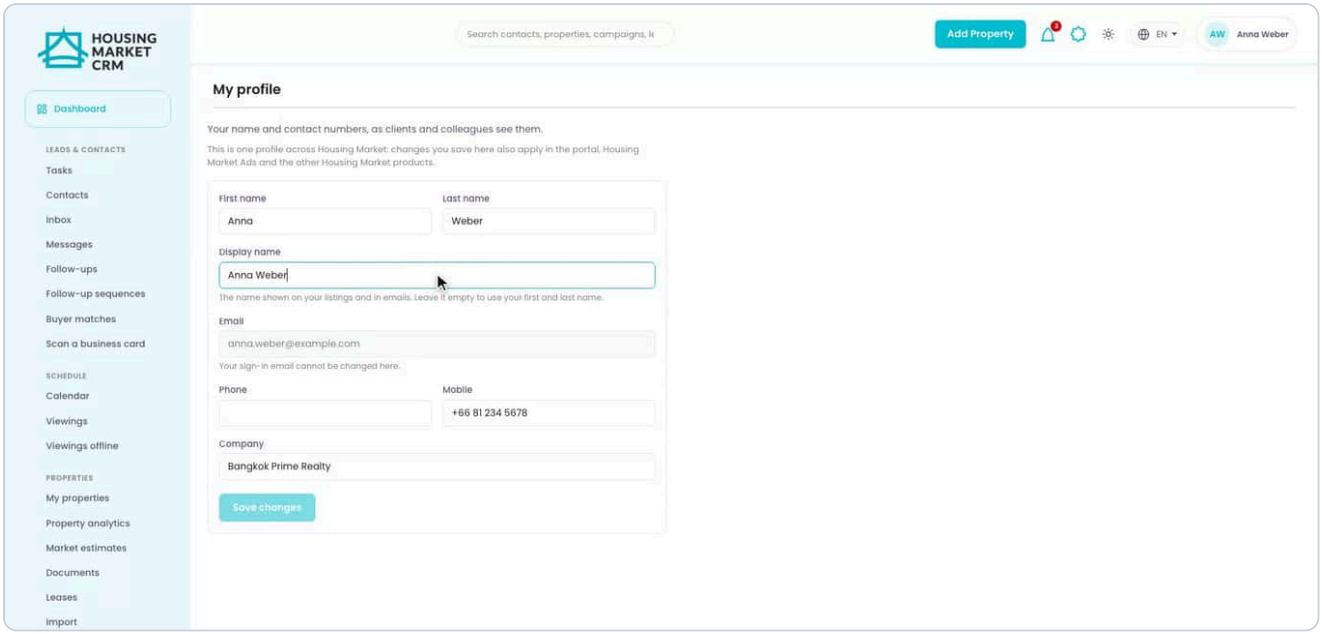


Figure 6.7 · Screen recorded 24 September 2026

8 Your **company**, exactly as on your portal profile.

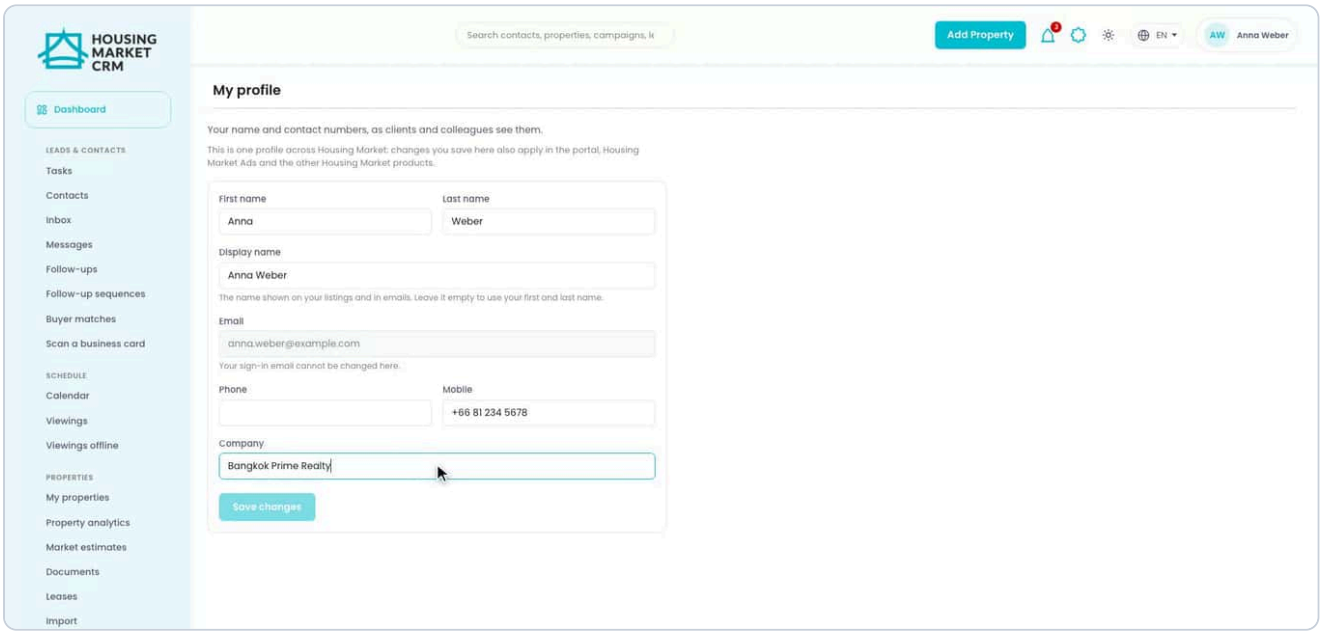


Figure 6.8 · Screen recorded 24 September 2026

9 An **office phone** number.

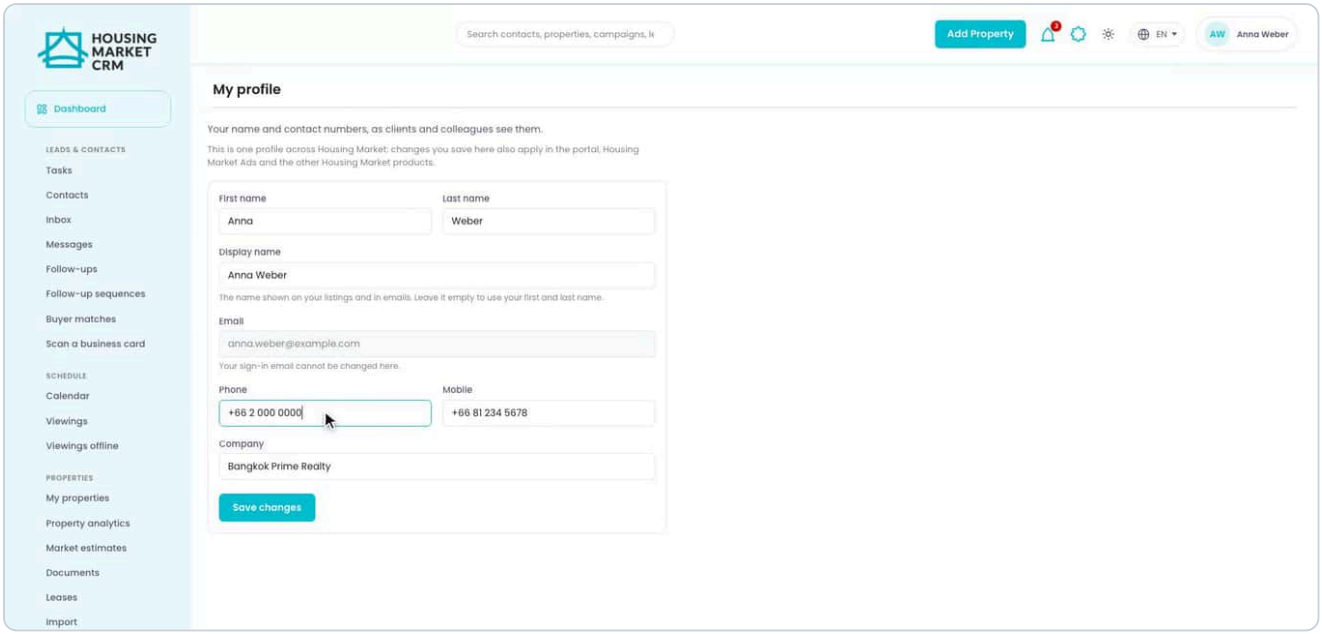


Figure 6.9 · Screen recorded 24 September 2026

10 And a **mobile** for buyers on the way to a viewing.

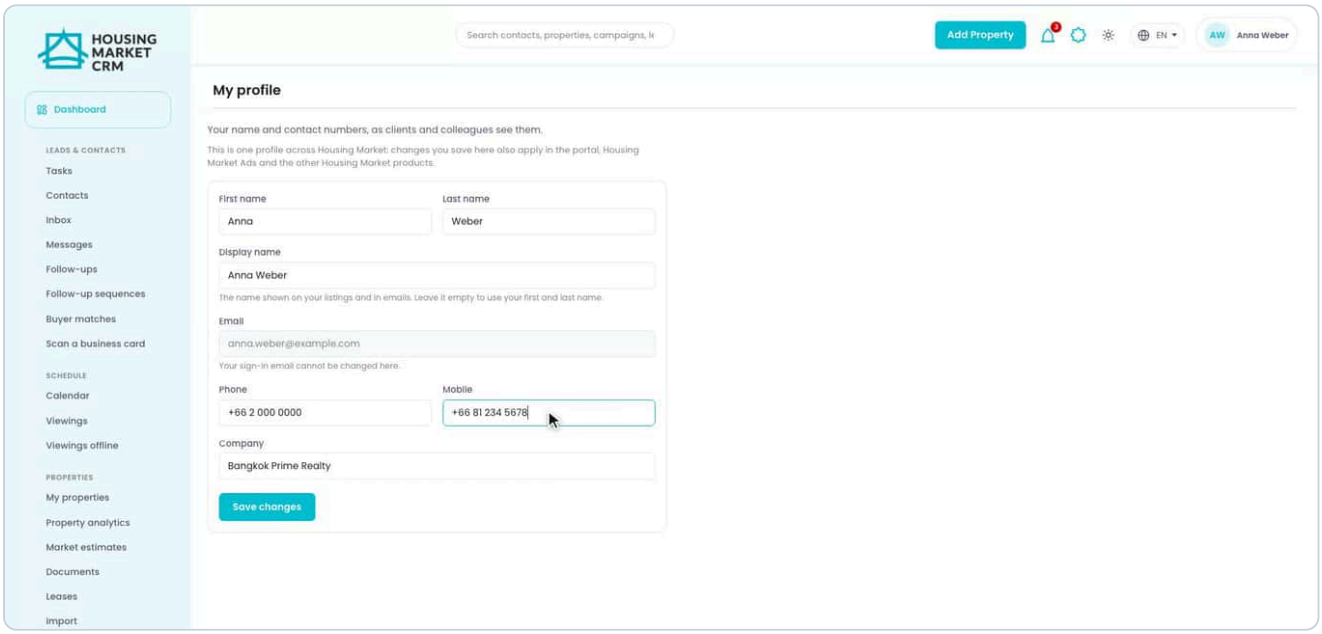


Figure 6.10 · Screen recorded 24 September 2026

11 Your **sign-in email** is shown, but it cannot be changed here.

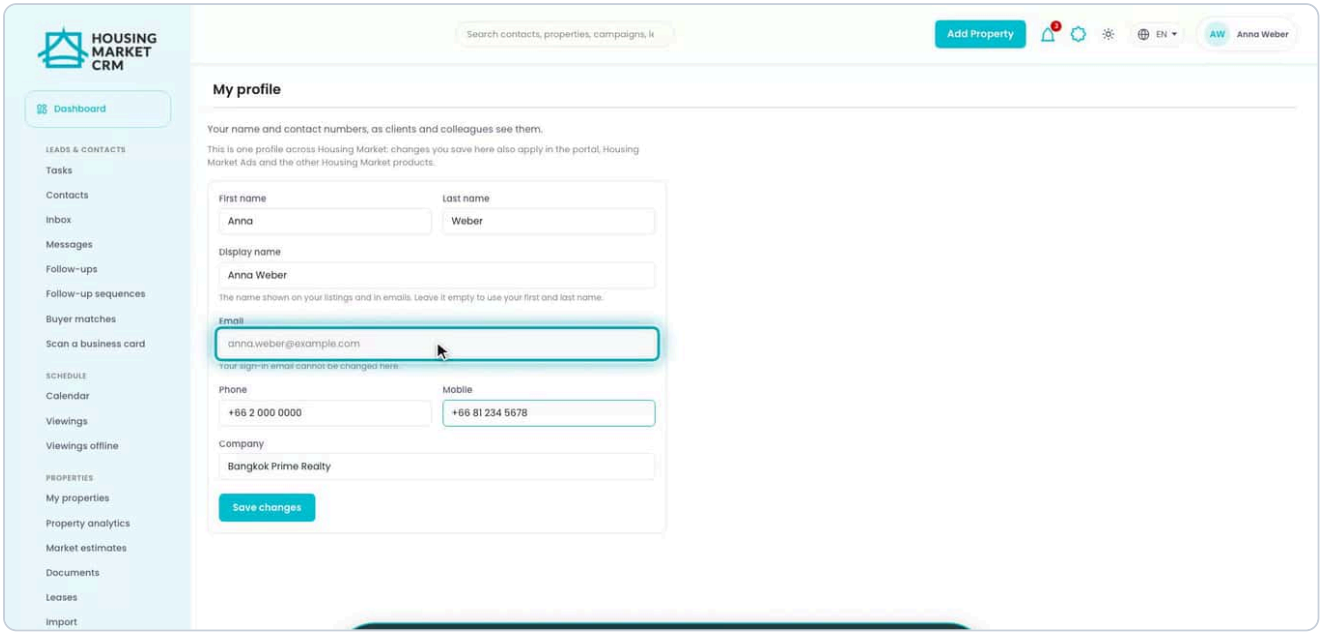


Figure 6.11 · Screen recorded 24 September 2026

12 It is the account you share with your **portal**, so support changes it for you.

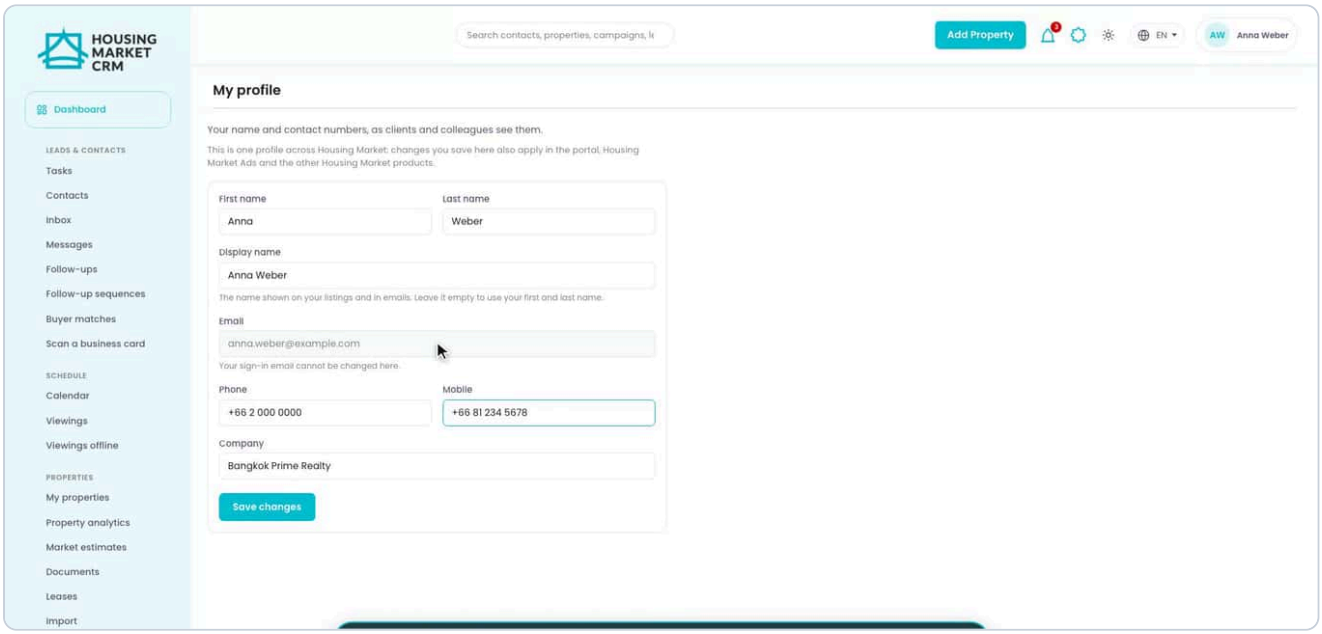


Figure 6.12 · Screen recorded 24 September 2026

13 Click **Save changes.**

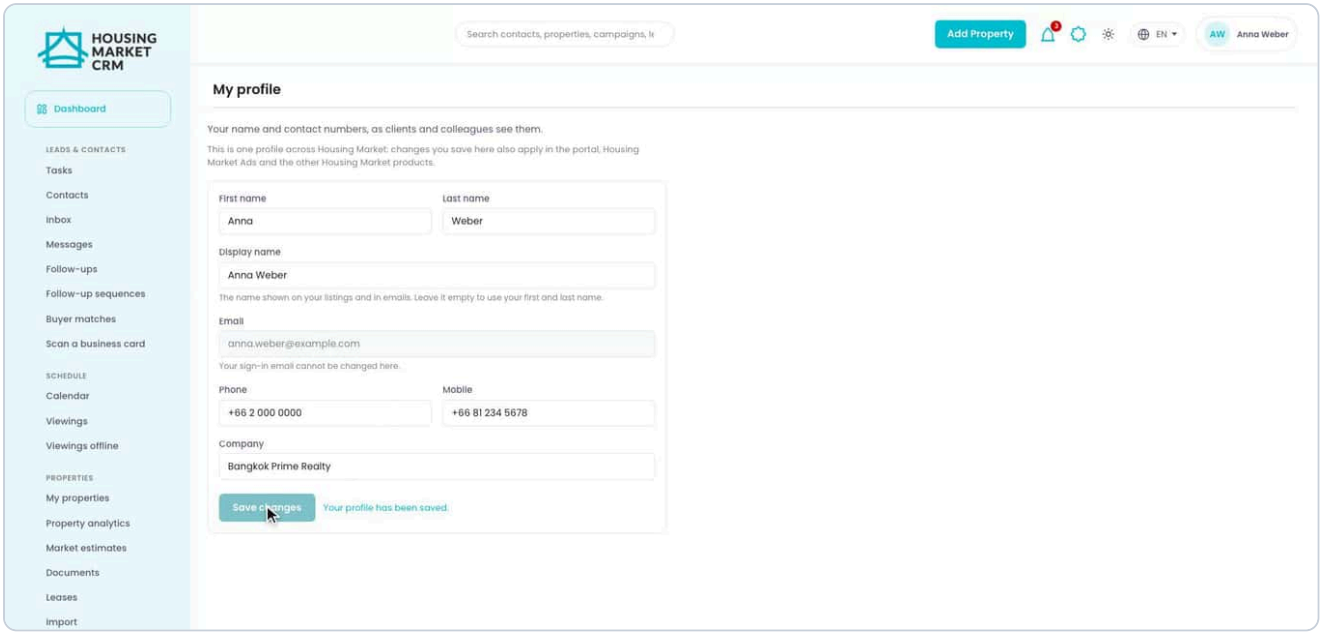


Figure 6.13 · Screen recorded 24 September 2026

14 Saved — and applied **everywhere you use Housing Market.**

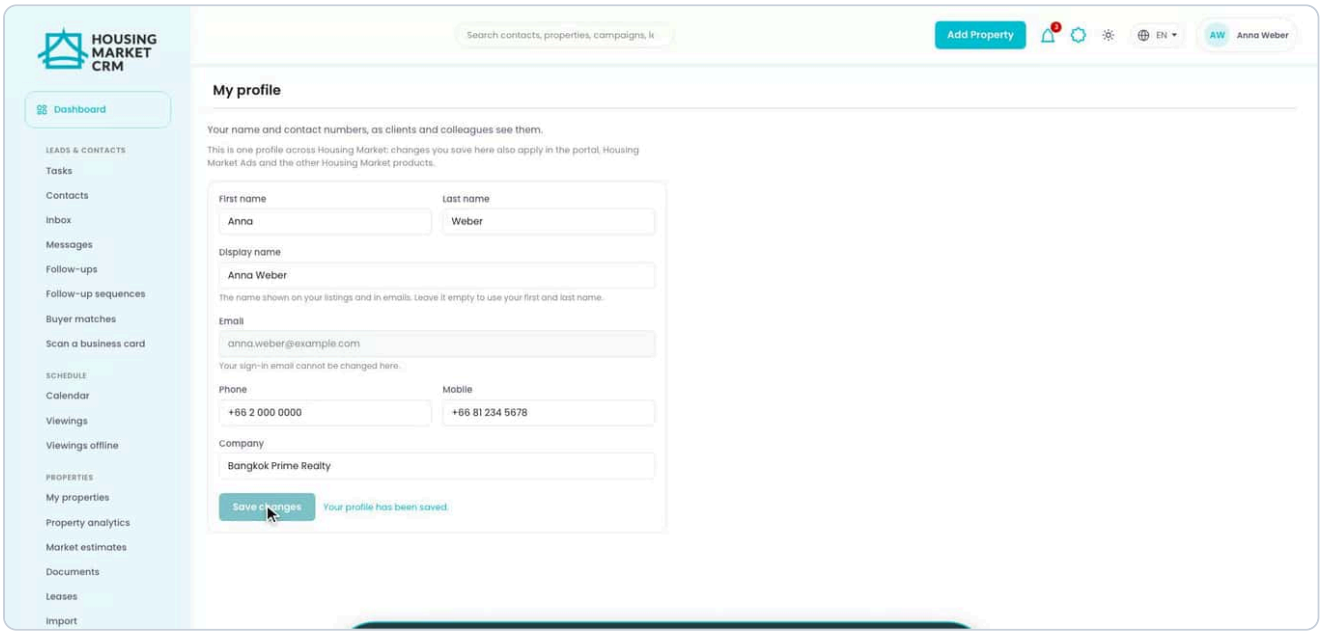


Figure 6.14 · Screen recorded 24 September 2026

RELATED HELP CENTER ARTICLES

Do I need a separate CRM account? — faq.housingmarketgroup.com/faq/do-i-need-a-separate-crm-account

7 CHAPTER 7

Switch the language

All plans | For agents | Watch the video

OVERVIEW

The whole CRM is available in seventeen languages. Choose yours from the language menu at the top of the screen; your notification emails follow it.

The CRM is available in seventeen languages, each shown in its own name:

- English, Español, Português (Brasil), Français and Deutsch
- العربية (Arabic), हिन्दी (Hindi), Türkçe and Ελληνικά (Greek)
- ไทย (Thai), Tiếng Việt, Bahasa Indonesia, Bahasa Melayu and ខ្មែរ (Khmer)
- 日本語 (Japanese), 简体中文 (Simplified Chinese) and 繁體中文 (Traditional Chinese)

To change it on a computer, open the language menu (the globe) at the top of the screen and pick a language; the Language setting under Settings (the gear) does the same. The log-in and sign-up pages have their own language menu. In Arabic the whole screen reads from right to left.

The choice is remembered in the browser you made it in, so choose again on another computer or phone. Your notification emails and your password reset emails are written in the language you use the CRM in — see "Which language are my CRM notification emails in?".

From the Help Center: **Which languages are supported?**

STEP BY STEP

1 Open your **Housing Market CRM** dashboard.

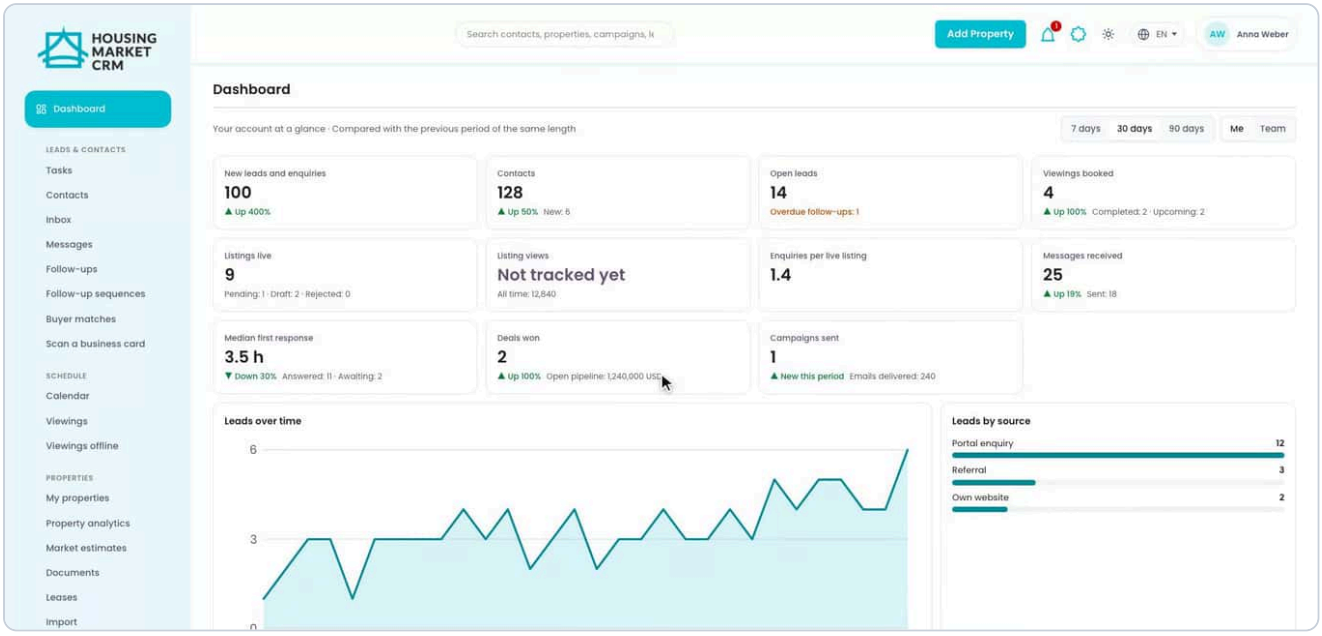


Figure 7.1 · Screen recorded 17 September 2026

2 Open the **language menu** in the header and pick **ไทย** (Thai).

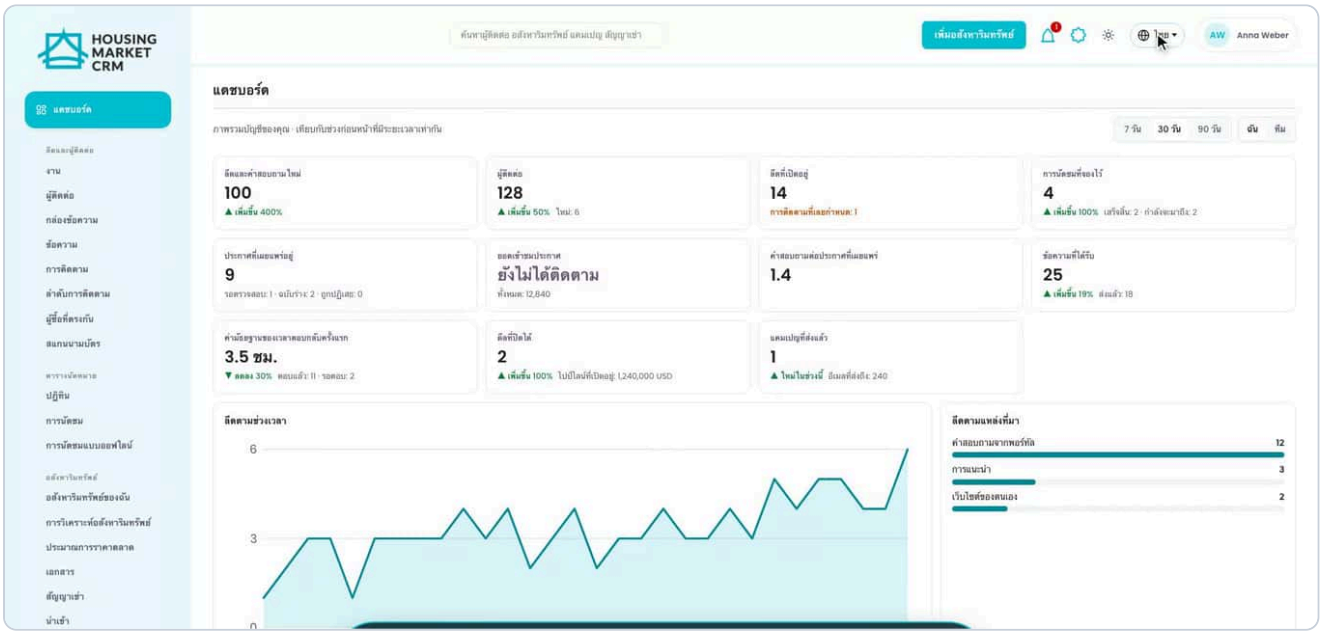


Figure 7.2 · Screen recorded 17 September 2026

3 The whole interface now appears in **Thai**.

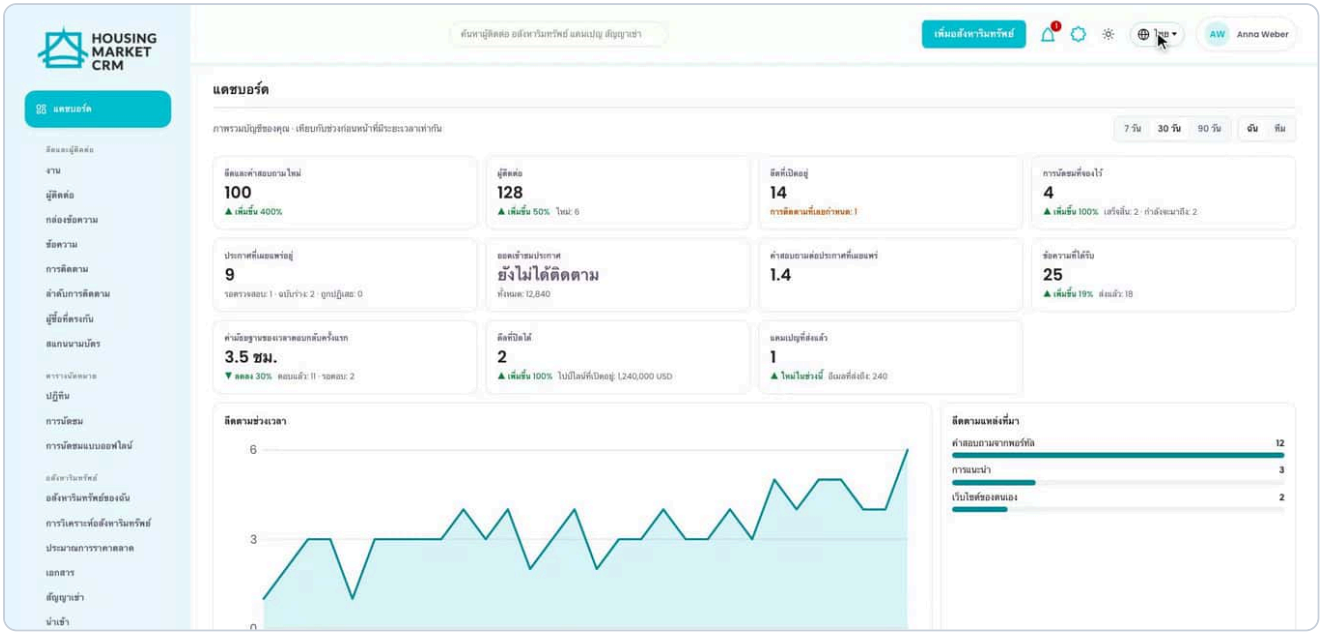


Figure 7.3 · Screen recorded 17 September 2026

4 Menus, labels and dates all follow your choice.

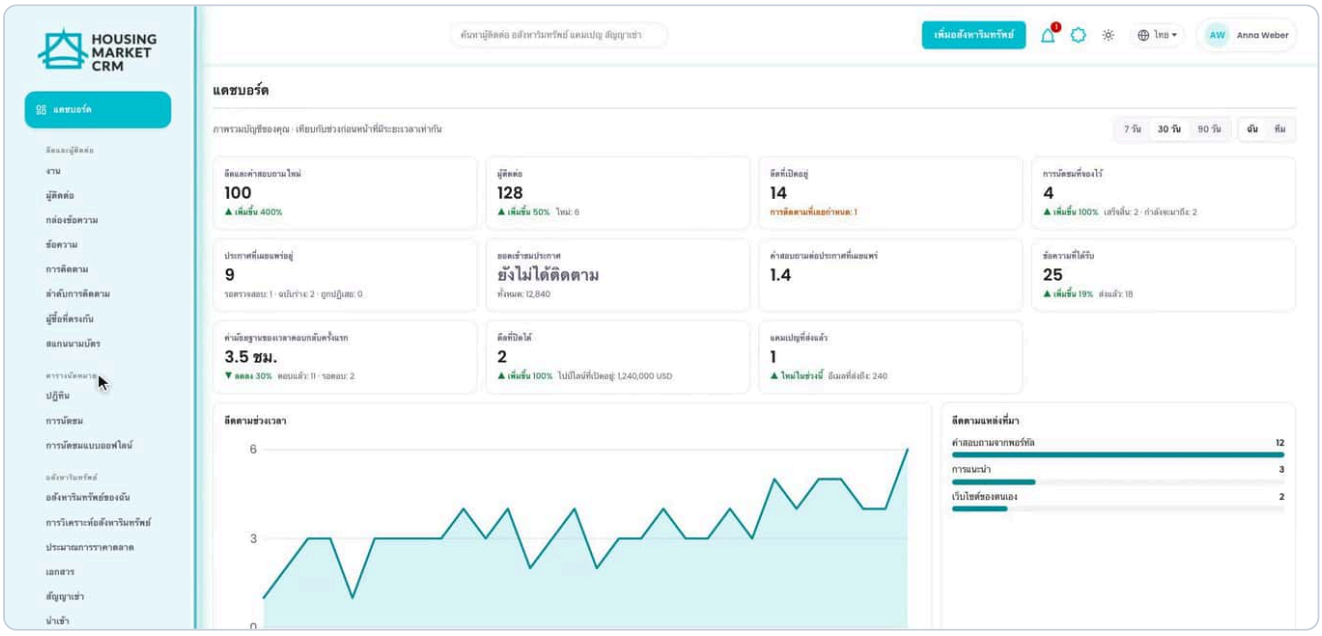


Figure 7.4 · Screen recorded 17 September 2026

5 Pick **English** to switch back.

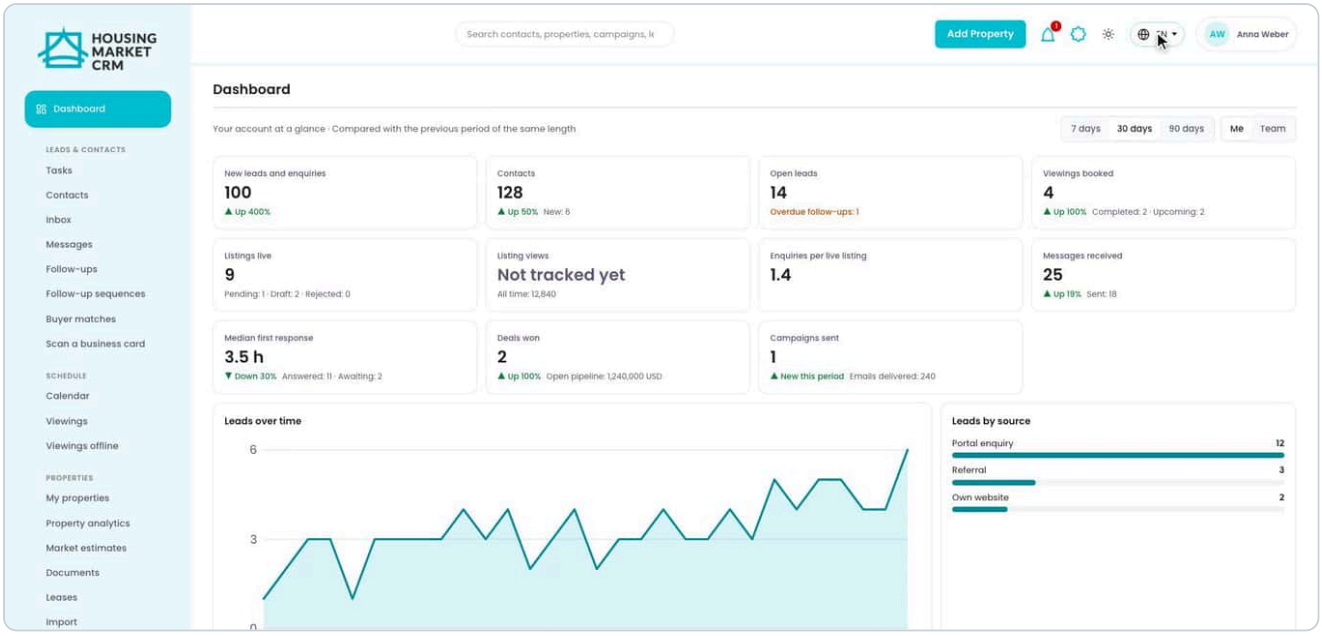


Figure 7.5 · Screen recorded 17 September 2026

6 Your choice is **remembered** for next time.

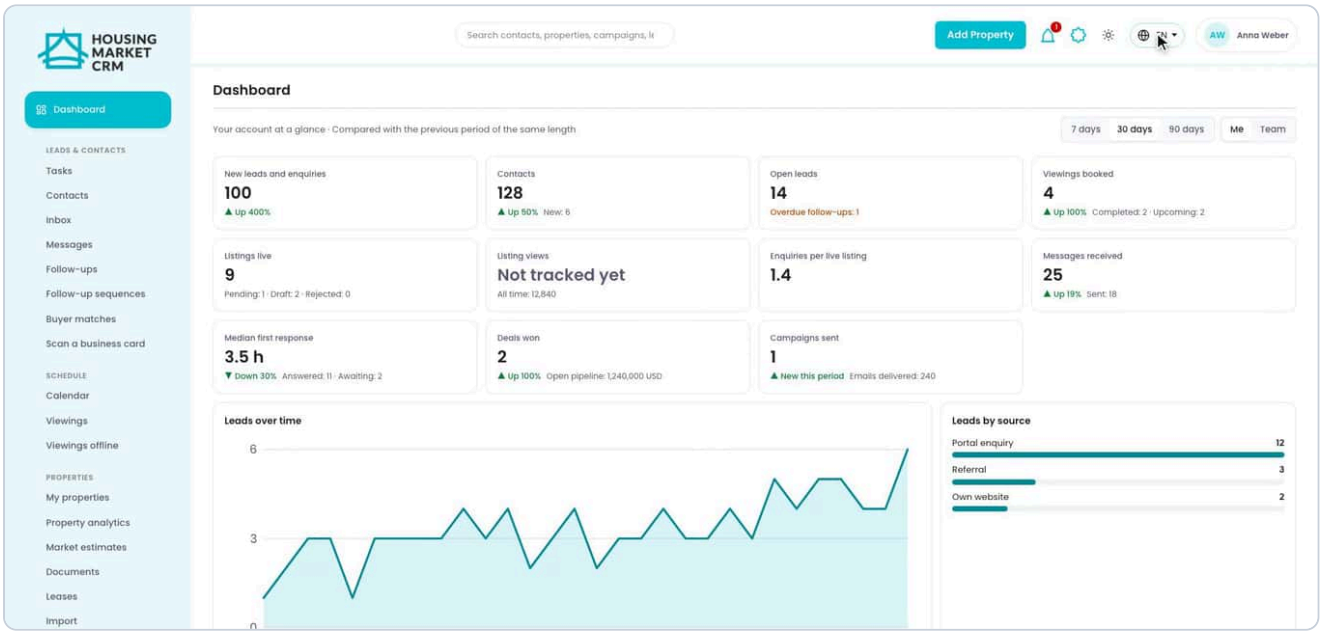


Figure 7.6 · Screen recorded 17 September 2026

GOOD TO KNOW

NOTE

The language you use the CRM in. Switch the CRM to another language and your notification emails switch with it.

Help Center: Which language are my CRM notification emails in?

8 CHAPTER 8

Search everything

All plans | For agents | Watch the video

TODO The Help Center says search "finds a contact, a lead or a property"; the video (2026-10-08) searches leads, contacts, properties, documents and tenancies from the header. Update the Help Center article to name what search covers today.

OVERVIEW

Yes. Search and filtering run over contacts, leads and properties, and the lead board filters by stage, status and sale or rental.

Search finds a contact, a lead or a property, and the lists filter rather than only sort — the lead board by stage, by status and by whether the lead is a sale or a rental.

Because every enquiry keeps the property it came from, "who asked about this listing" is answered from the listing rather than by searching for it.

From the Help Center: **Can I search for contacts?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

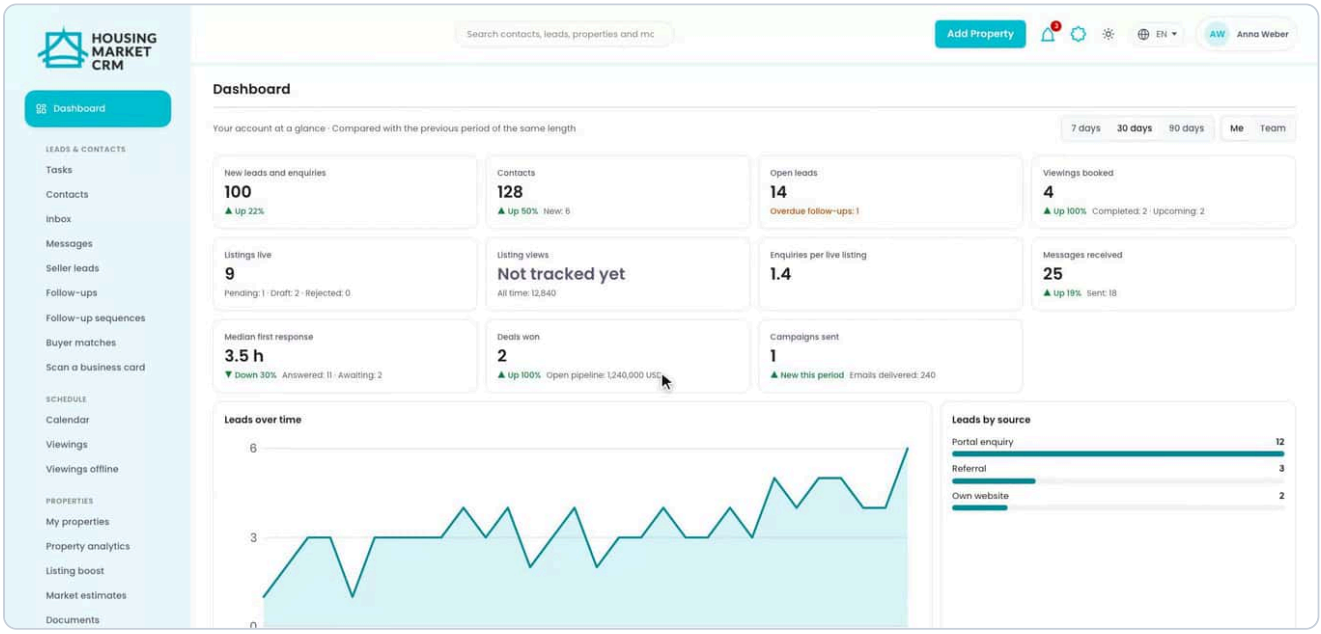


Figure 8.1 · Screen recorded 8 October 2026

2 The search box sits in the **header**, on every screen.

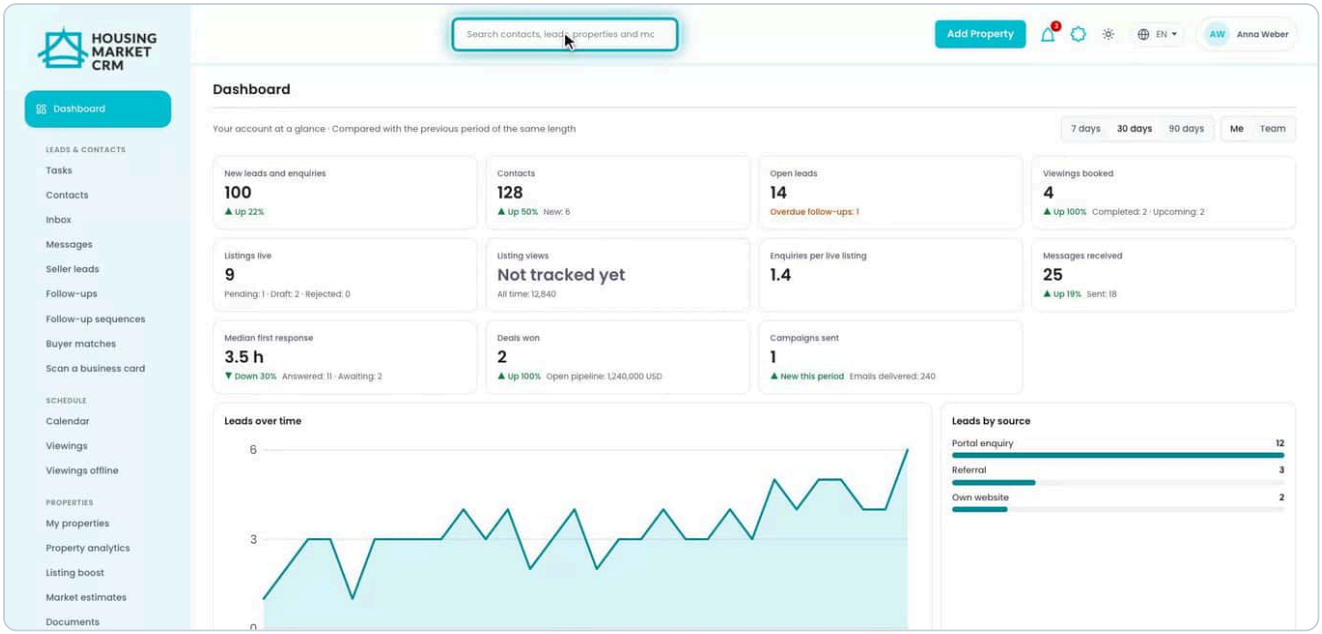


Figure 8.2 · Screen recorded 8 October 2026

3 Type part of a **name** — or a number, or a street.

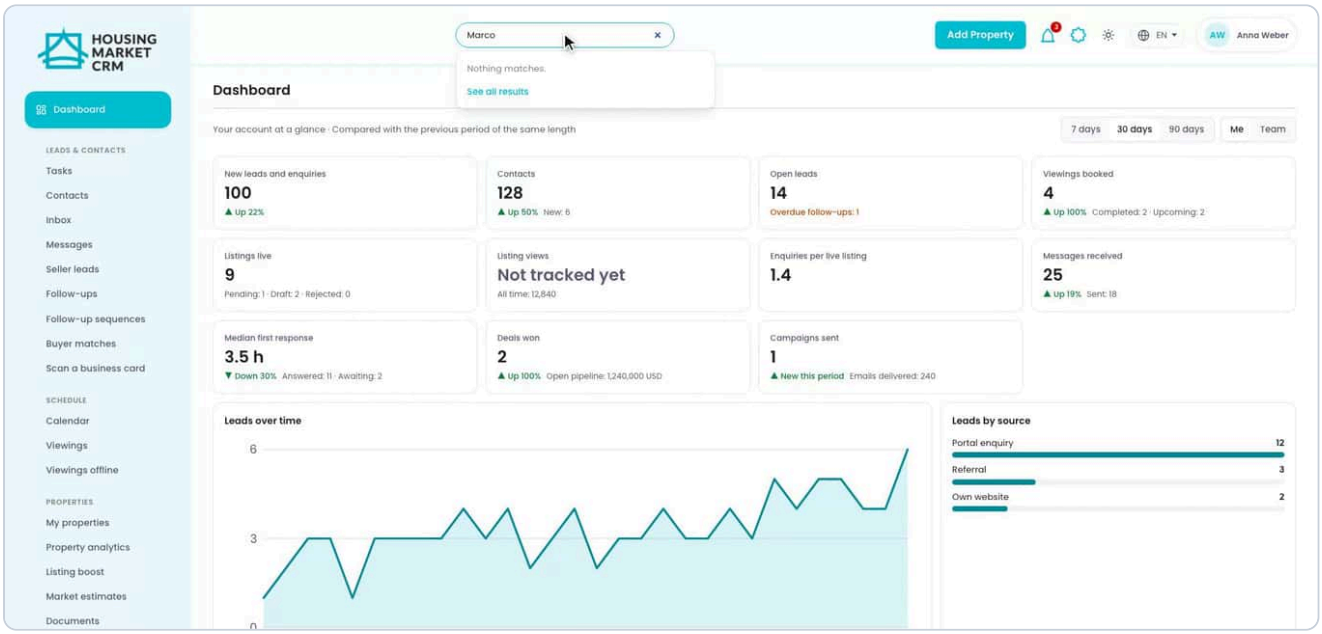


Figure 8.3 · Screen recorded 8 October 2026

4 It looks across **leads, contacts, properties, documents** and tenancies.

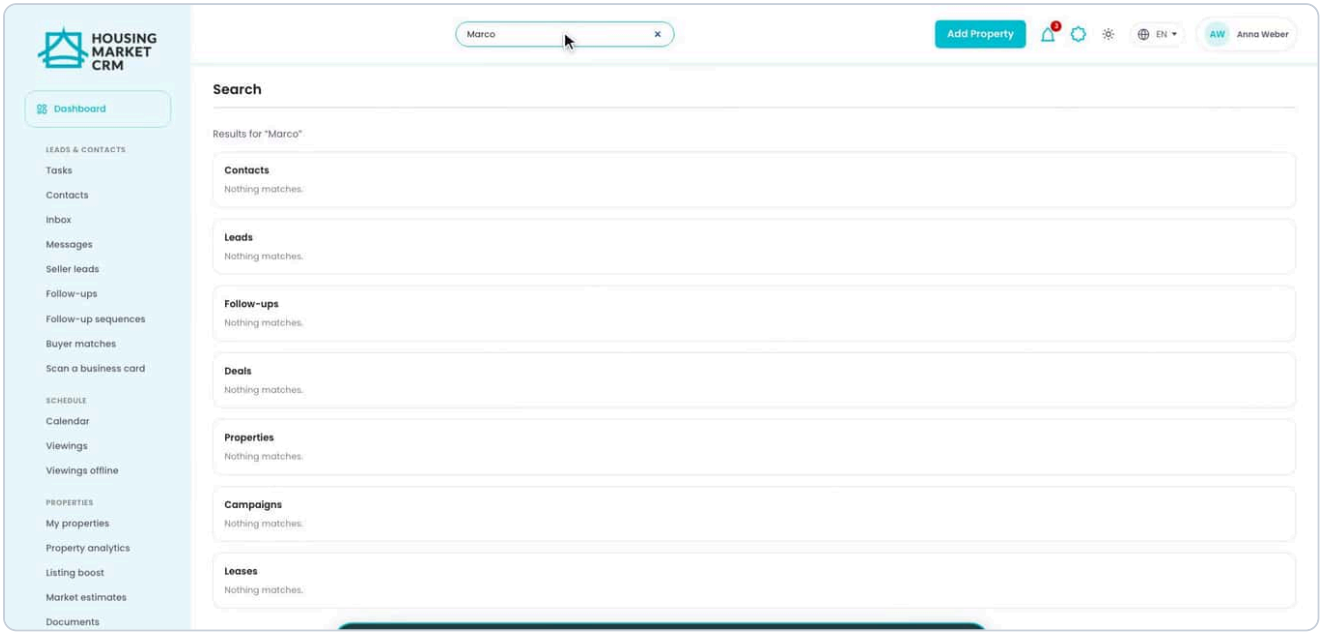


Figure 8.4 · Screen recorded 8 October 2026

5 Press **Enter** for the full list, **grouped by what each thing is**.

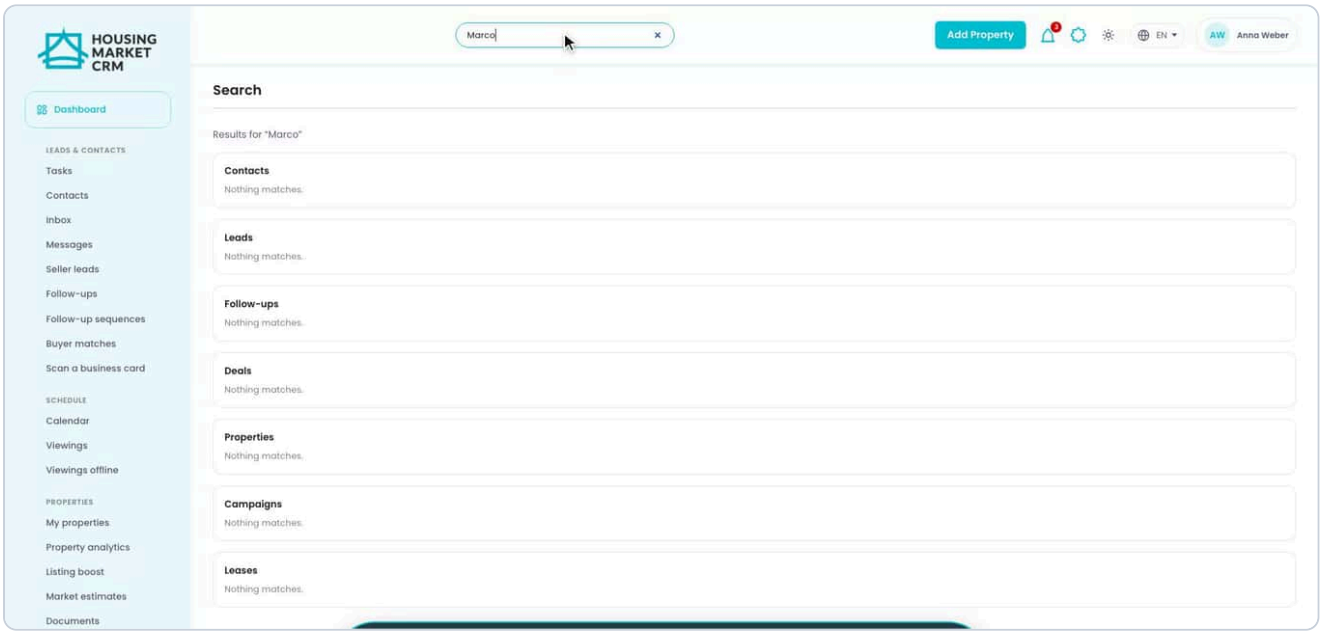


Figure 8.5 · Screen recorded 8 October 2026

6 Click a result to open it — faster than opening a list and filtering it.

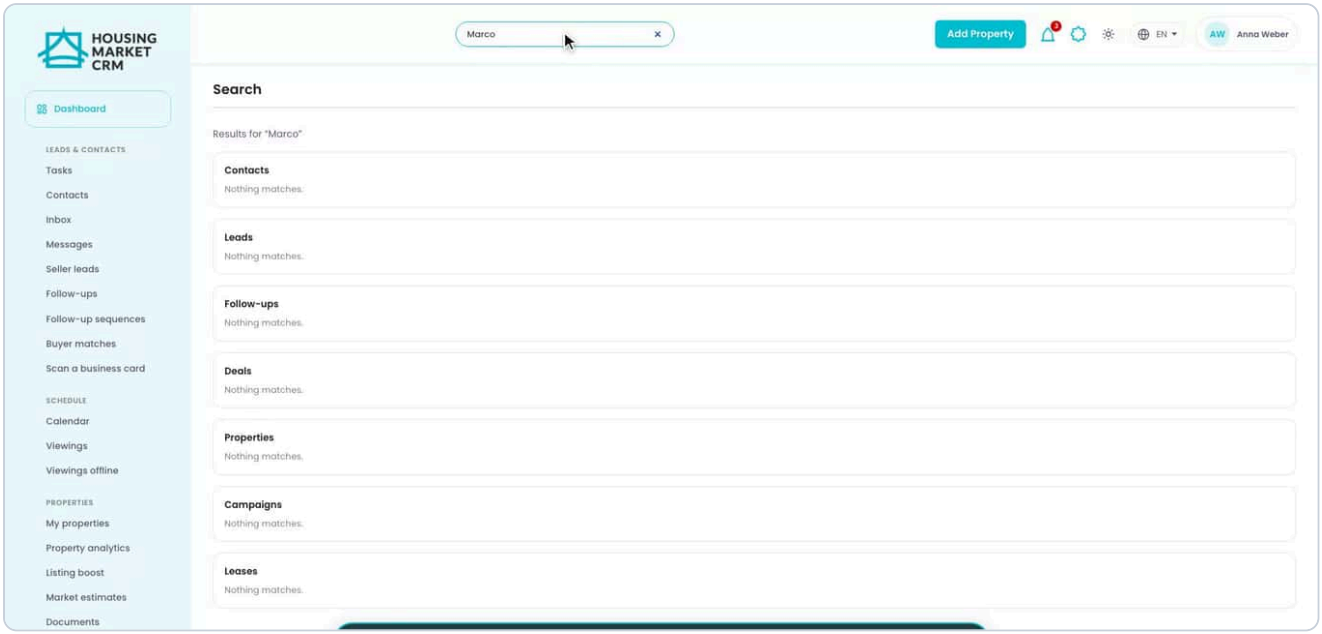


Figure 8.6 · Screen recorded 8 October 2026

7 On a phone, **Search** has its own entry in the left menu.

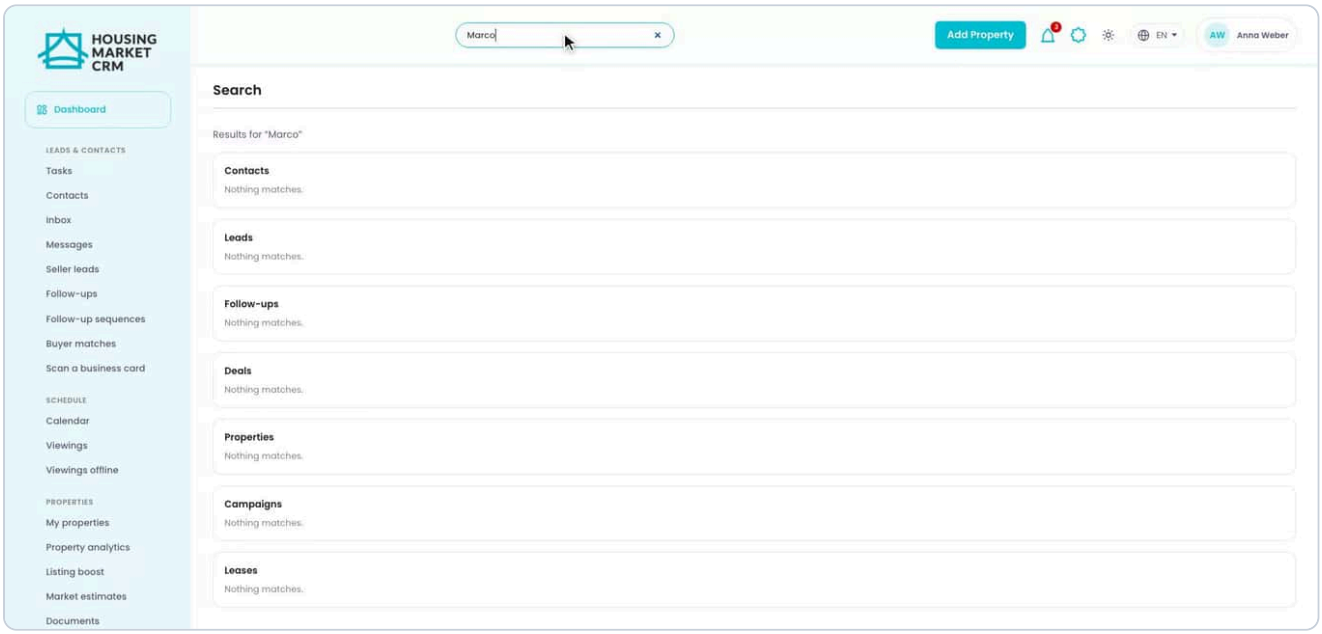


Figure 8.7 · Screen recorded 8 October 2026

RELATED HELP CENTER ARTICLES

Can I use Housing Market CRM on my phone? faq.housingmarketgroup.com/faq/can-i-use-the-crm-on-my-phone

9 CHAPTER 9

Verify your email by link

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

Choose Create a free account, fill in your name, email, a password and your country, then click the link in the verification email. There is no code to type. The account is also your agent account on that country's portal.

- Open https://dashboard.housingmarketcrm.com/signup, or choose Sign up on housingmarketcrm.com.
- Enter your First name, Last name, Email, a Password of at least eight characters, and the Country you work in.
- Choose Create account.
- Check your email and click the verification link. There is no code to type. The link in the CRM's email works for 7 days.
- Log in with your email address and password.

The account is created as an agent account on the Housing Market portal for the country you chose, so the same email and password also sign you in there. It starts on the free plan, with no card.

Until you have clicked the link you can log in, but you cannot use the CRM: a banner asks you to verify your email address. If the email does not arrive, check your spam folder, then choose Resend verification email on the confirmation screen or on the log-in page, or Send me a new verification email in the banner. If you typed the wrong address, choose Wrong address? Change my email address in the banner. An email address that already belongs to an account on any Housing Market Group portal cannot be used again — log in with that account instead.

From the Help Center: **How do I create a Housing Market CRM account?**

STEP BY STEP

1 Open your new **Housing Market CRM** account.

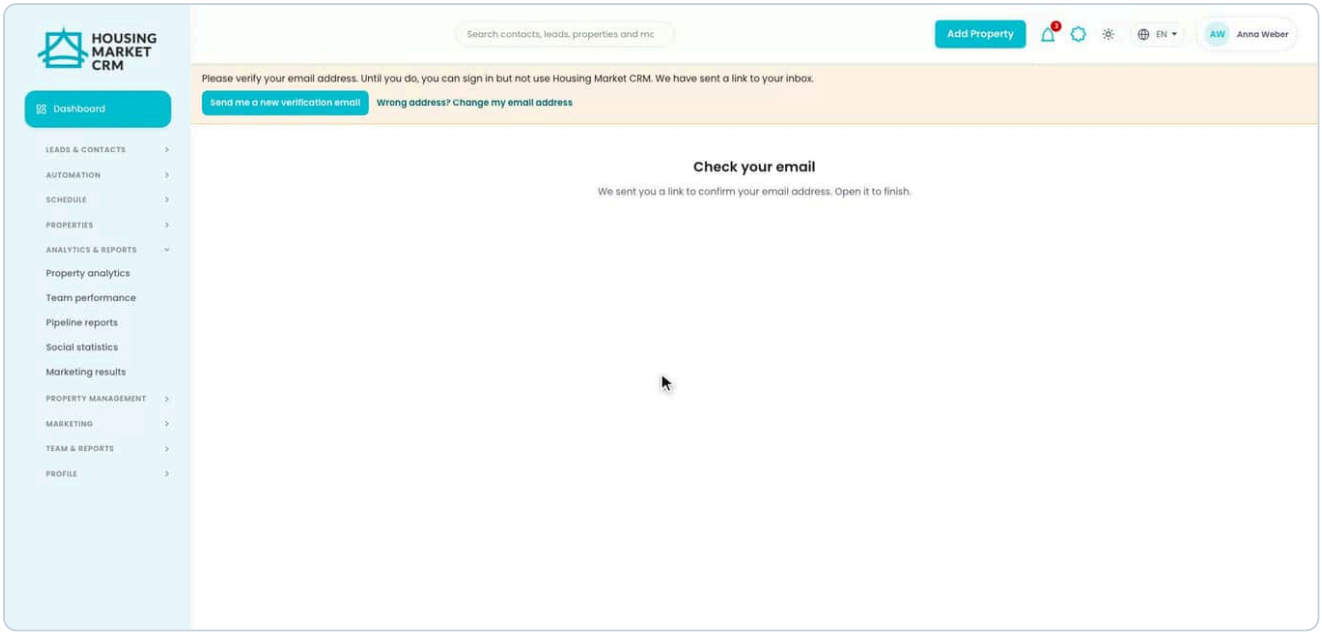


Figure 9.1 · Screen recorded 4 November 2026

2 Until your address is verified, the CRM asks you to **check your email**.

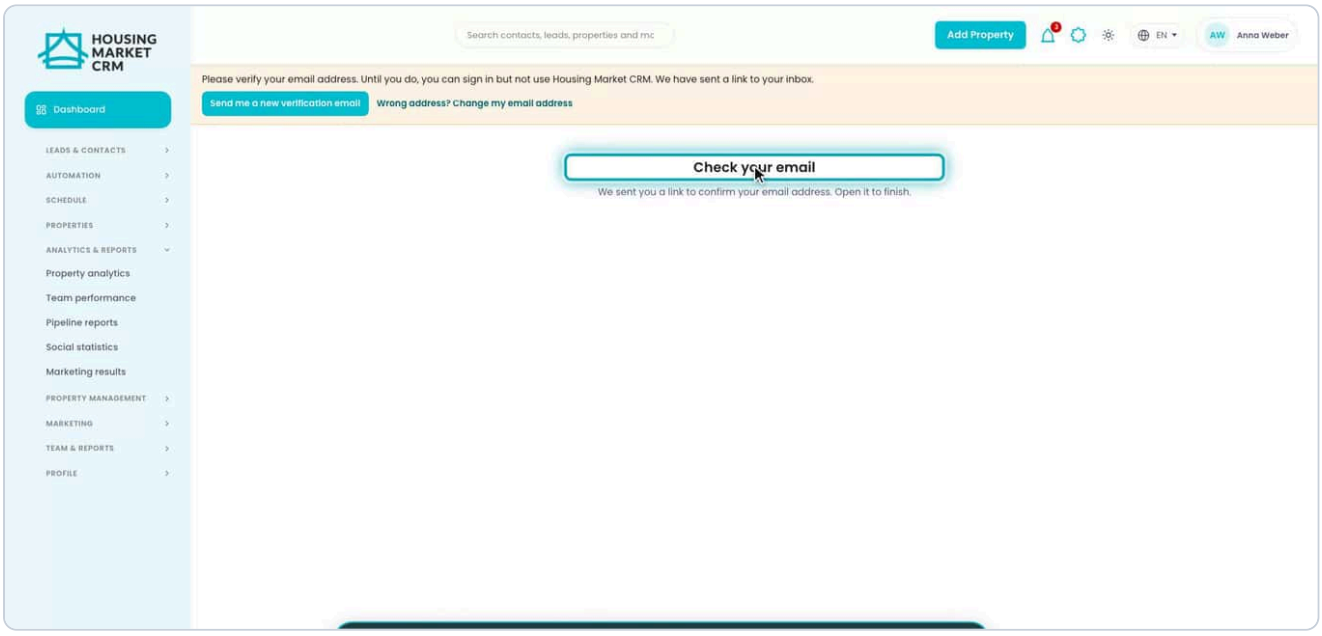


Figure 9.2 · Screen recorded 4 November 2026

3 You can sign in, but you can use the CRM once you have **verified** your address.

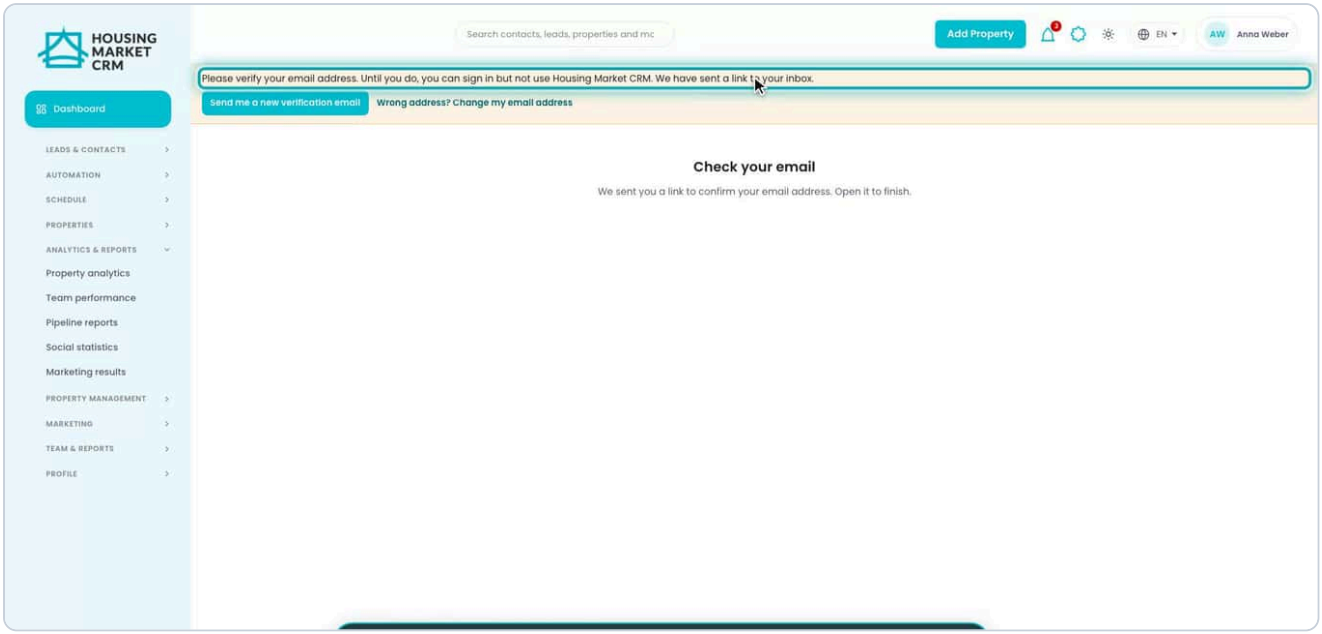


Figure 9.3 · Screen recorded 4 November 2026

4 No email yet? Click **Send me a new verification email**.

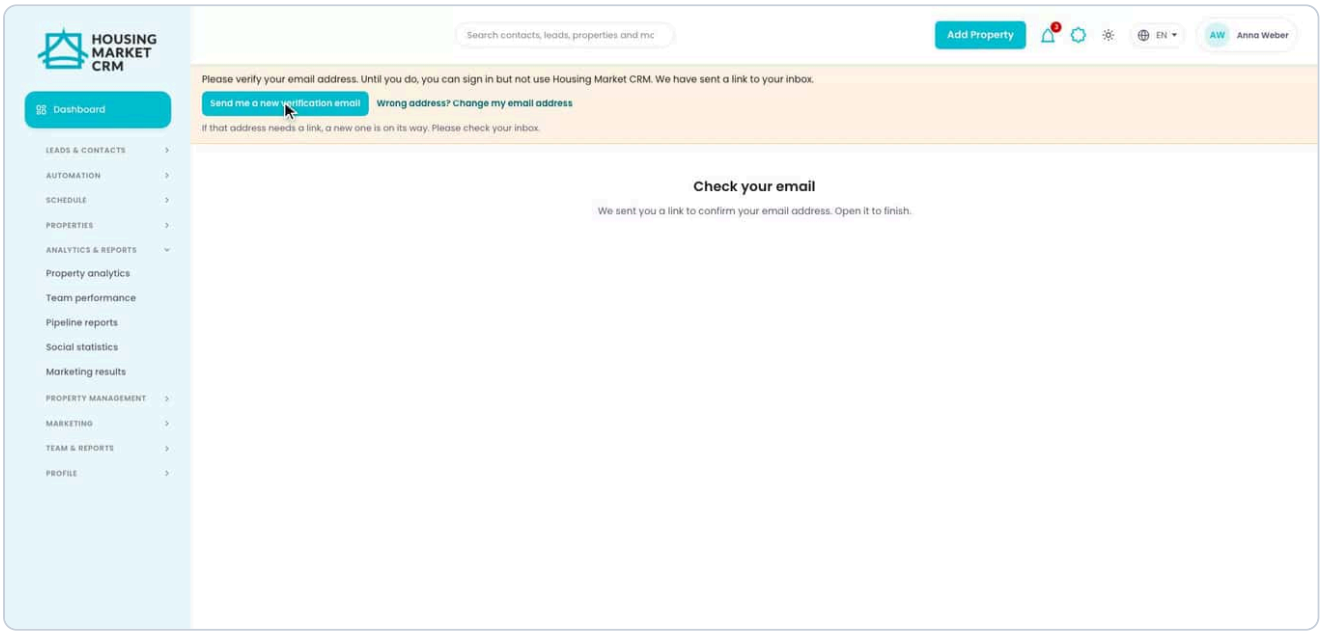


Figure 9.4 · Screen recorded 4 November 2026

5 A new one is on its way. It **may take a minute** to arrive.

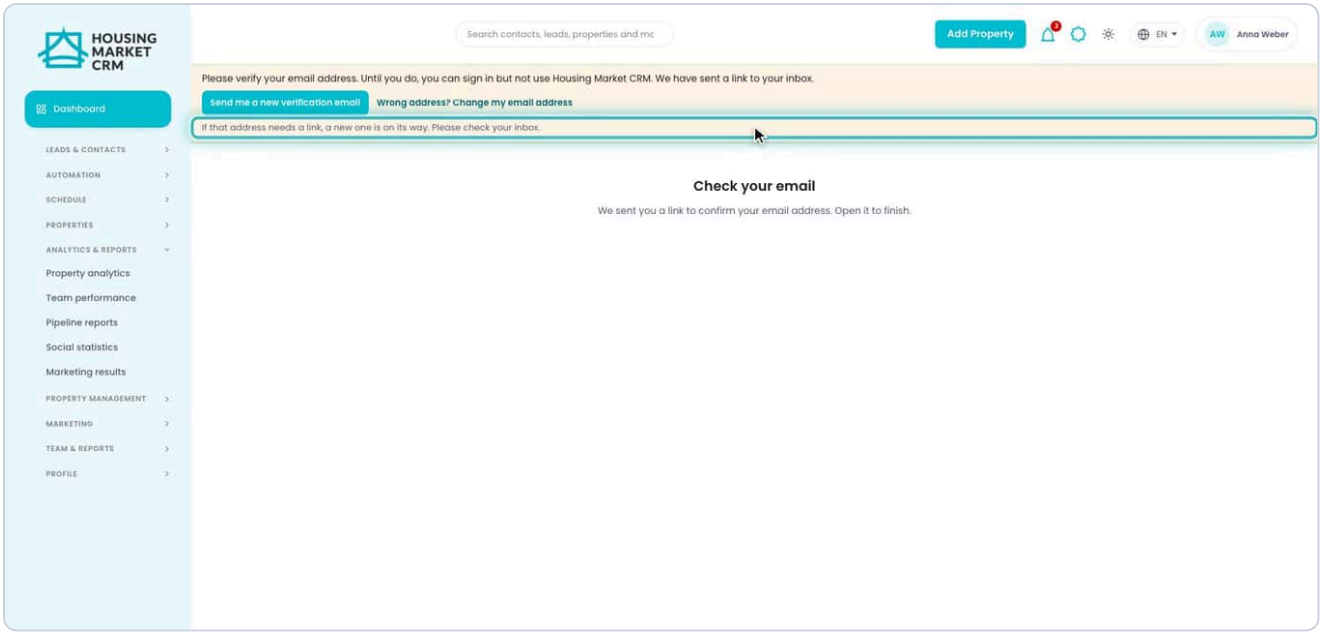


Figure 9.5 · Screen recorded 4 November 2026

6 Made a typing mistake? Click **Wrong address? Change my email address**.

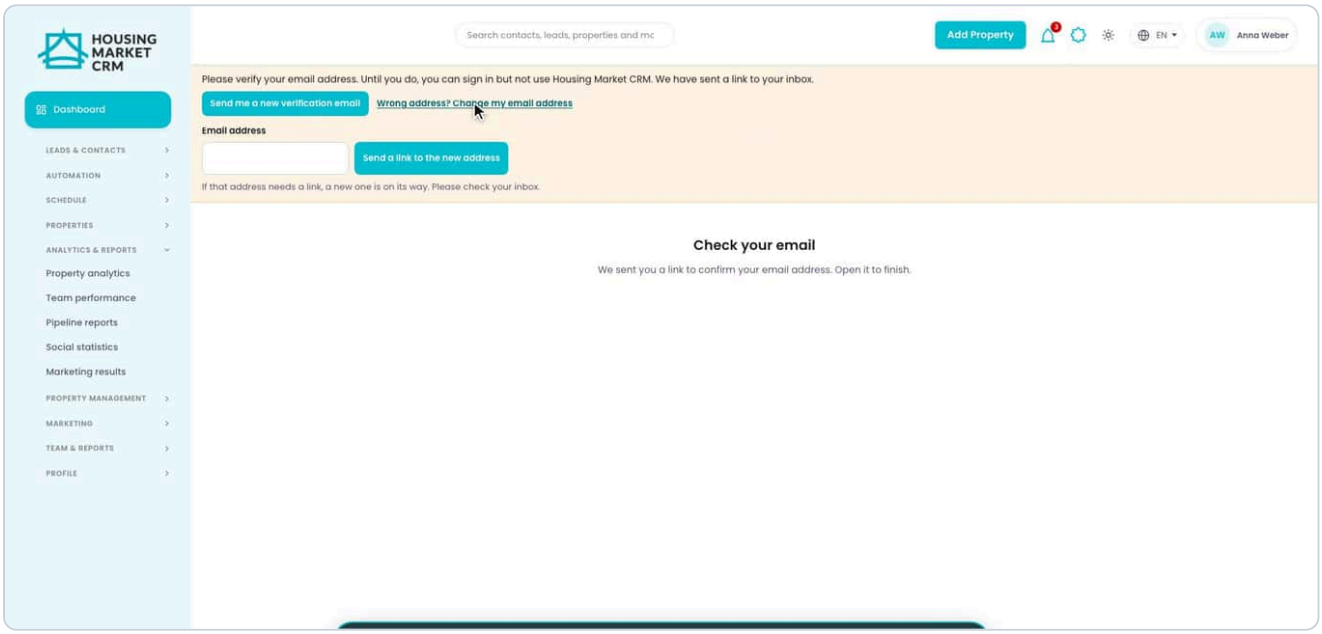


Figure 9.6 · Screen recorded 4 November 2026

7 Type the **right address**, and a link is sent to it.

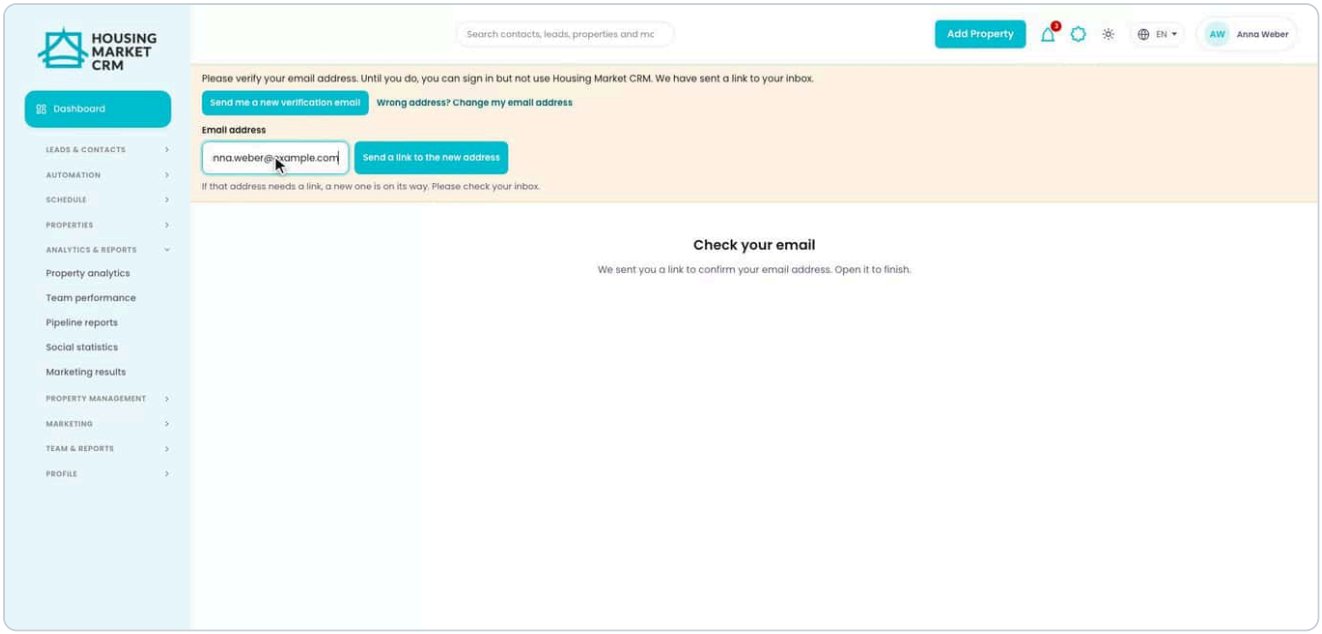


Figure 9.7 · Screen recorded 4 November 2026

8 Your address changes when you press the button in that email.

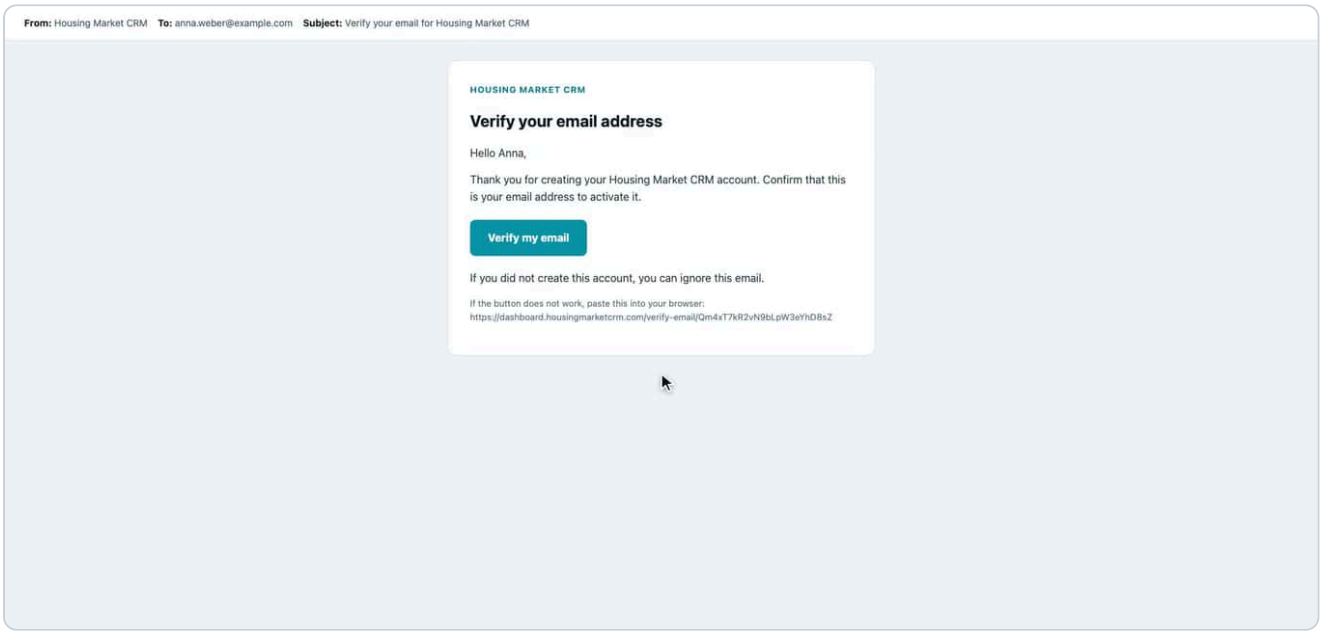


Figure 9.8 · Screen recorded 4 November 2026

9 This is the email. There is **no code** to copy.

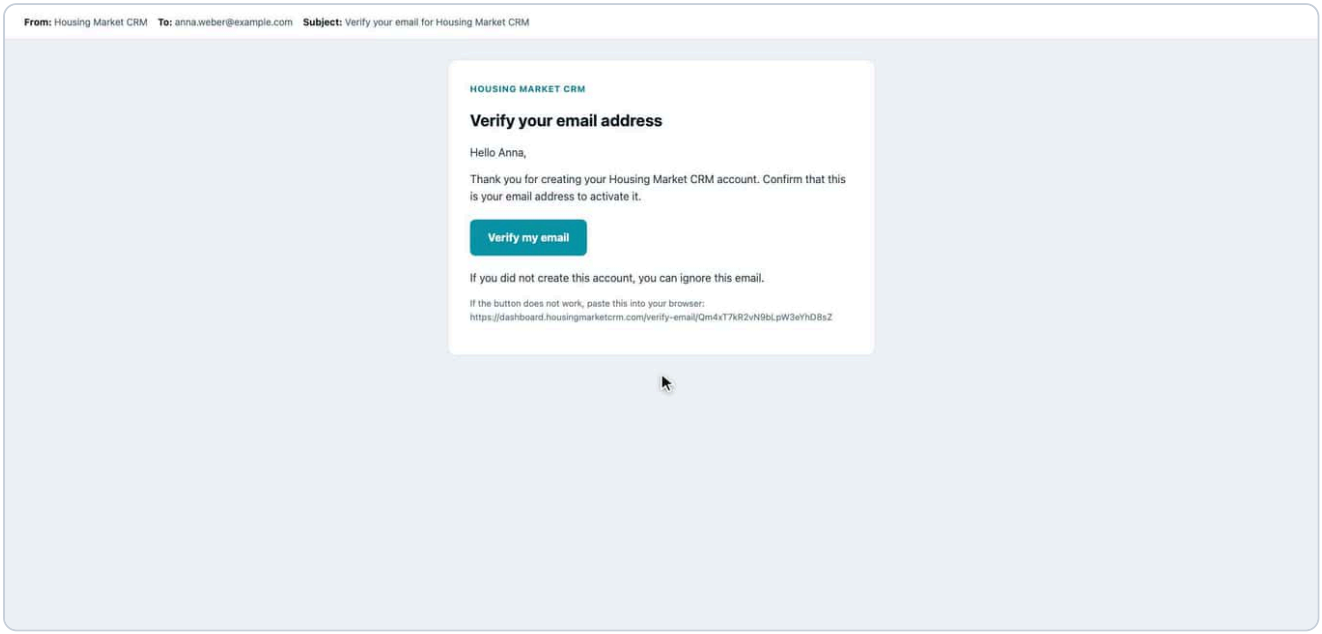


Figure 9.9 · Screen recorded 4 November 2026

10 Click **Verify my email**.

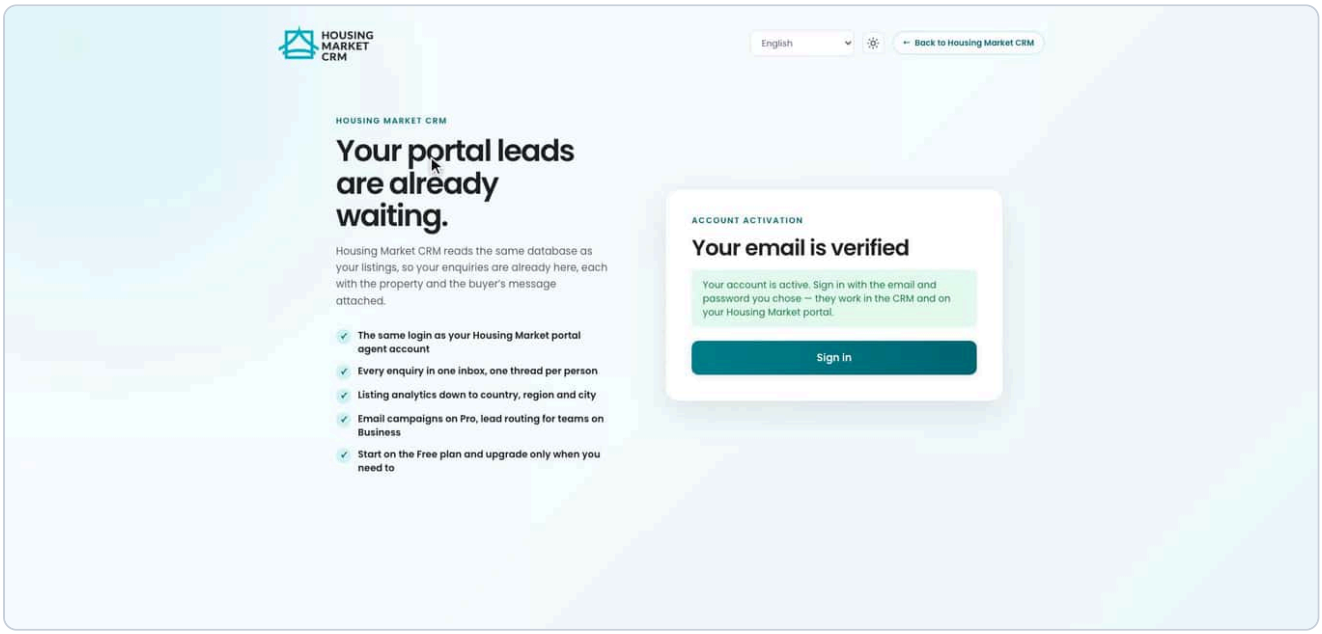


Figure 9.10 · Screen recorded 4 November 2026

11 Your address is **verified**.

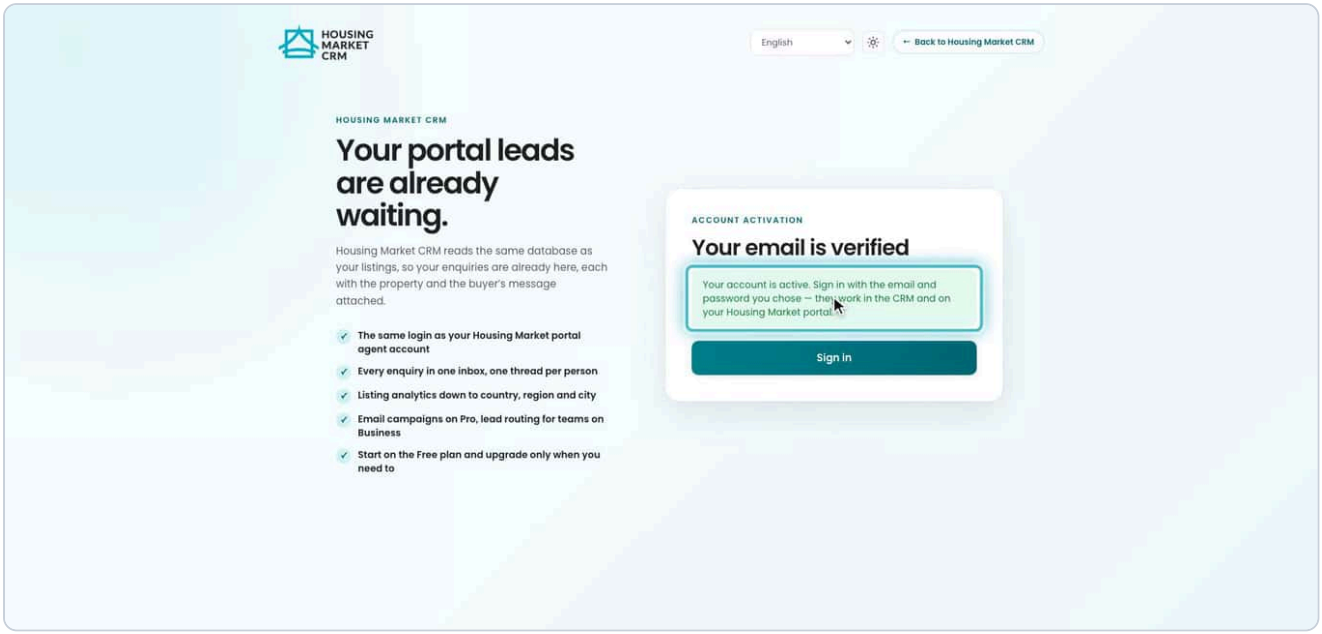


Figure 9.11 · Screen recorded 4 November 2026

12 Now **sign in** with the email and password you chose.

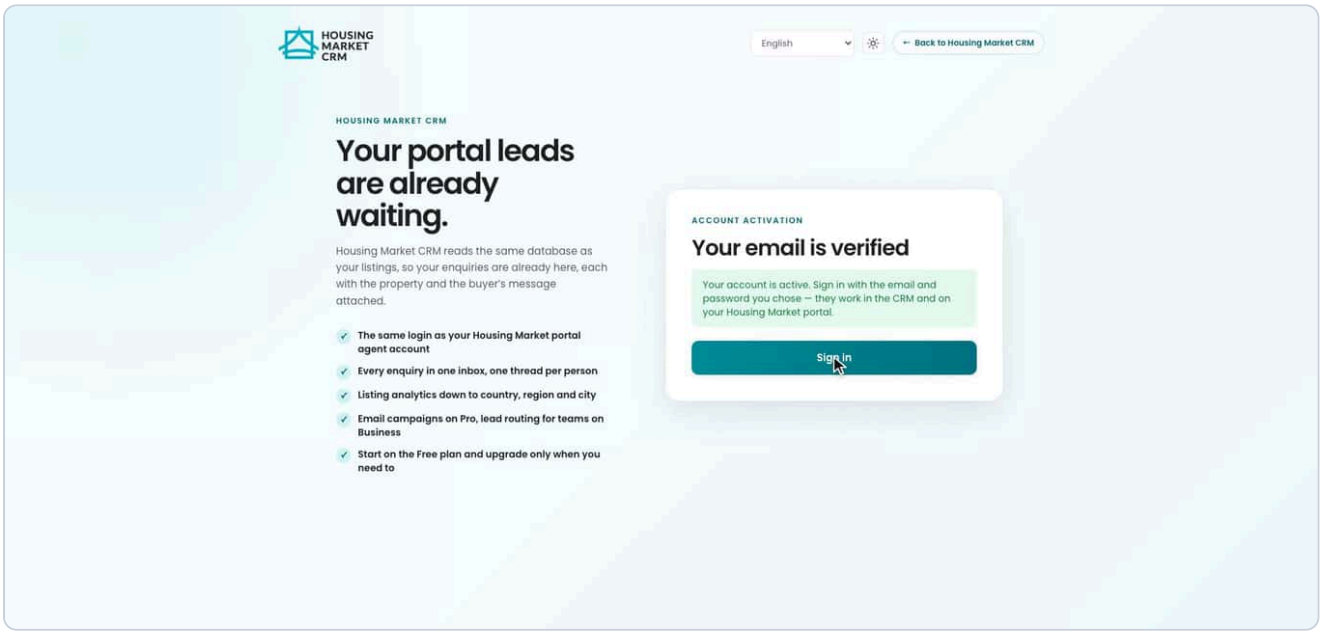


Figure 9.12 · Screen recorded 4 November 2026

RELATED HELP CENTER ARTICLES

How do I reset my Housing Market CRM password?	faq.housingmarketgroup.com/faq/how-do-i-reset-my-password

10 CHAPTER 10

What Beta, New and Currently updating mean

All plans | For agents and agencies | Watch the video

OVERVIEW

Beta means a feature is new and still being finished. New means it works and launched recently. Updated means an existing feature changed. Currently updating means a part is still being finished.

Small markers next to a screen or a button tell you how finished that part of Housing Market CRM is. The other Housing Market apps use the same markers in the same way. A marker only adds a note: it never hides, replaces or switches off the feature it sits on.

- Beta: the feature is new and not fully working yet. It carries a small Beta tag and the line This feature is new. Tell us what you think. You can use it, and your feedback helps us finish it.
- New: the feature works fully and launched recently. It carries only a small New tag.
- Updated: a feature you already know has changed and works fully. It carries only a small Updated tag.
- Currently updating: a part of the screen is still being finished and is not available yet. The note says which part, so you are never left guessing.

Every tag ends by itself: a Beta tag is shown for up to 60 days after the feature started, and a New or Updated tag for up to 30 days. After that the tag goes and the feature stays exactly as it was.

A marker is not a price or a plan. Which plan a feature belongs to is stated on its own screen and in its answer in this Help Center.

From the Help Center: **What do the Beta, New, Updated and Currently updating markers mean?**

STEP BY STEP

1 Open **Settings**, then **Notifications**.

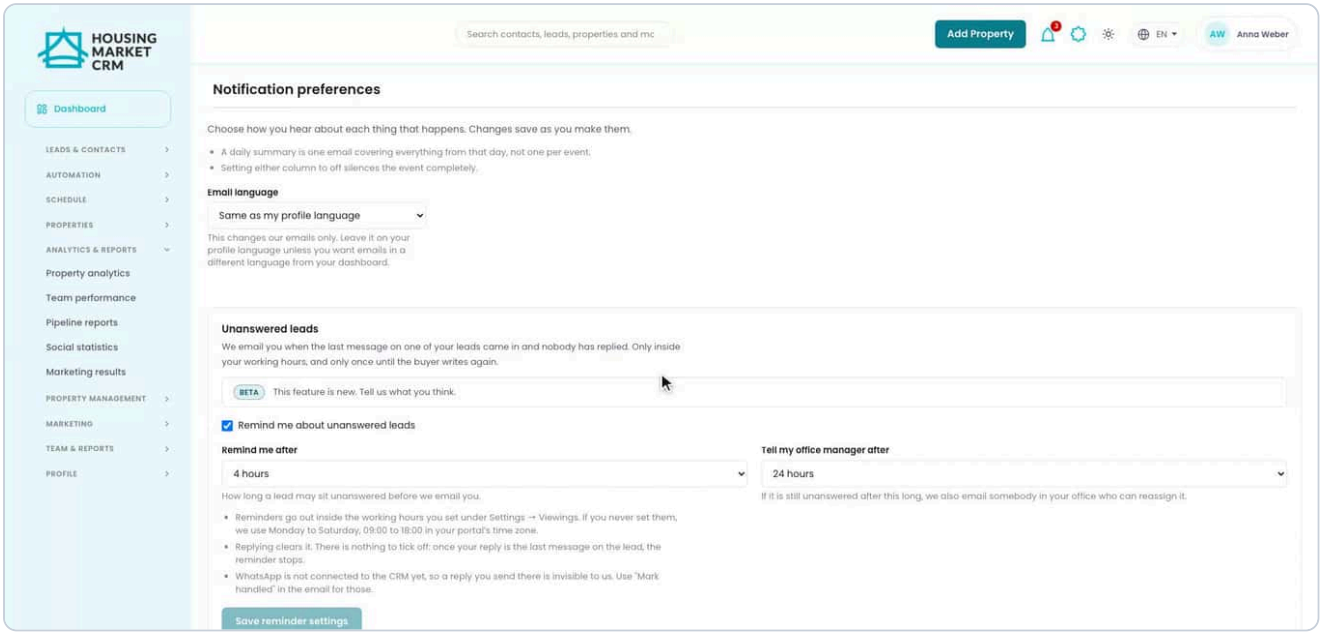


Figure 10.1 · Screen recorded 5 November 2026

2 Some parts carry a small **Beta** marker.

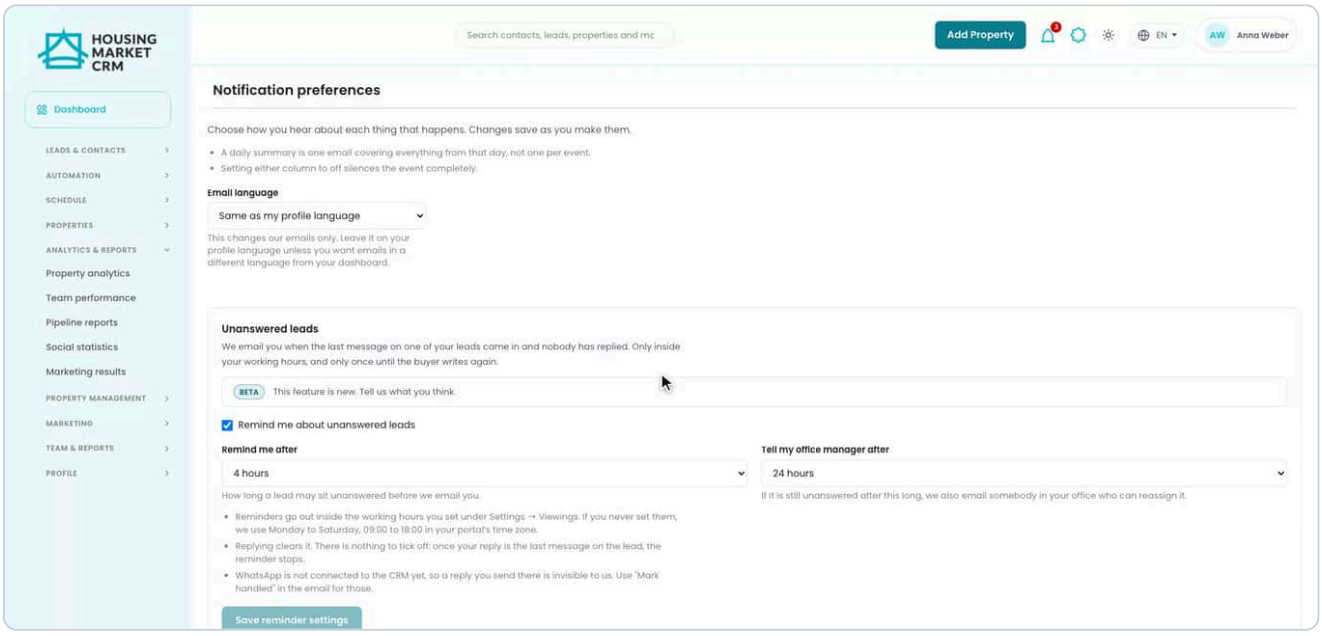


Figure 10.2 · Screen recorded 5 November 2026

3 **Beta** means the feature is **new and ready to use**. We want to hear what you think.

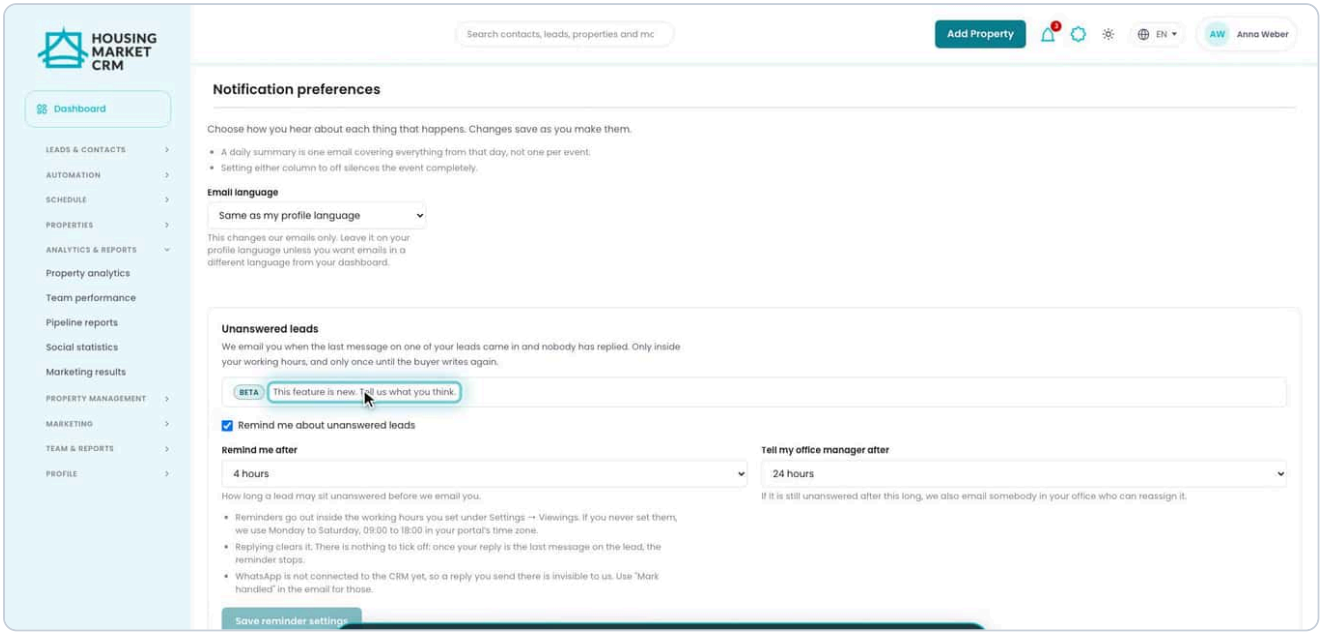


Figure 10.3 · Screen recorded 5 November 2026

4 **New** and **Updated** point out something that was just added or just changed.

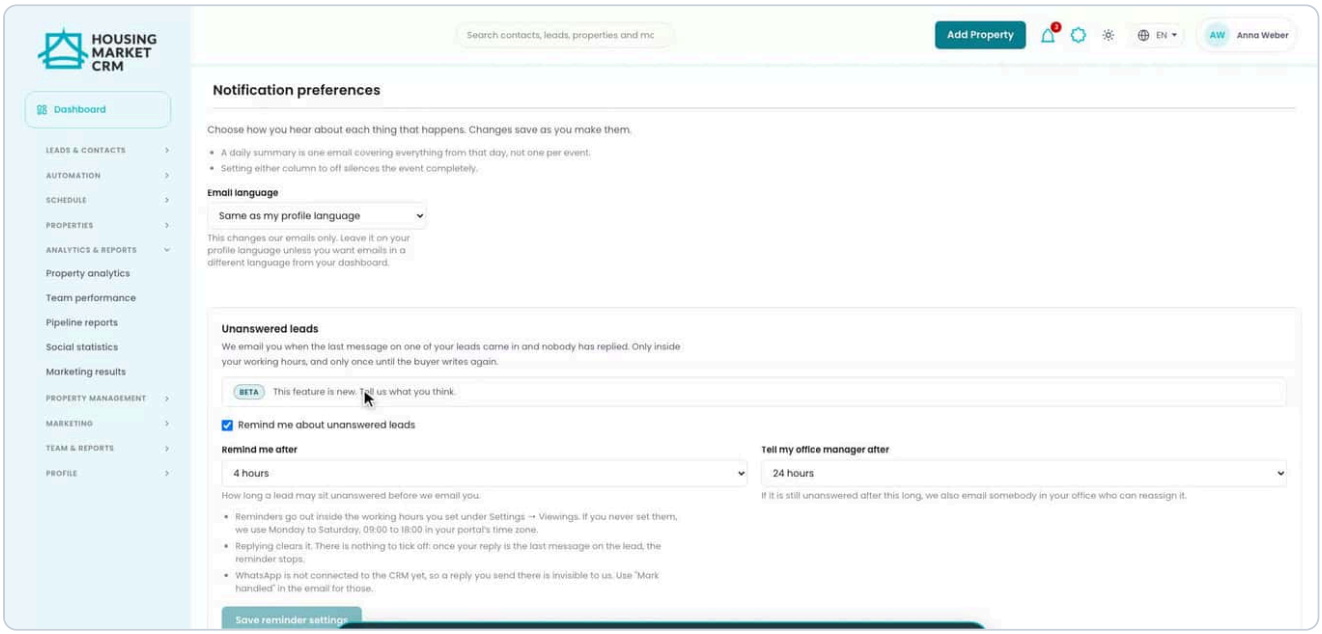


Figure 10.4 · Screen recorded 5 November 2026

5 **Currently updating** means a part is **not ready yet**. It will appear when it is.

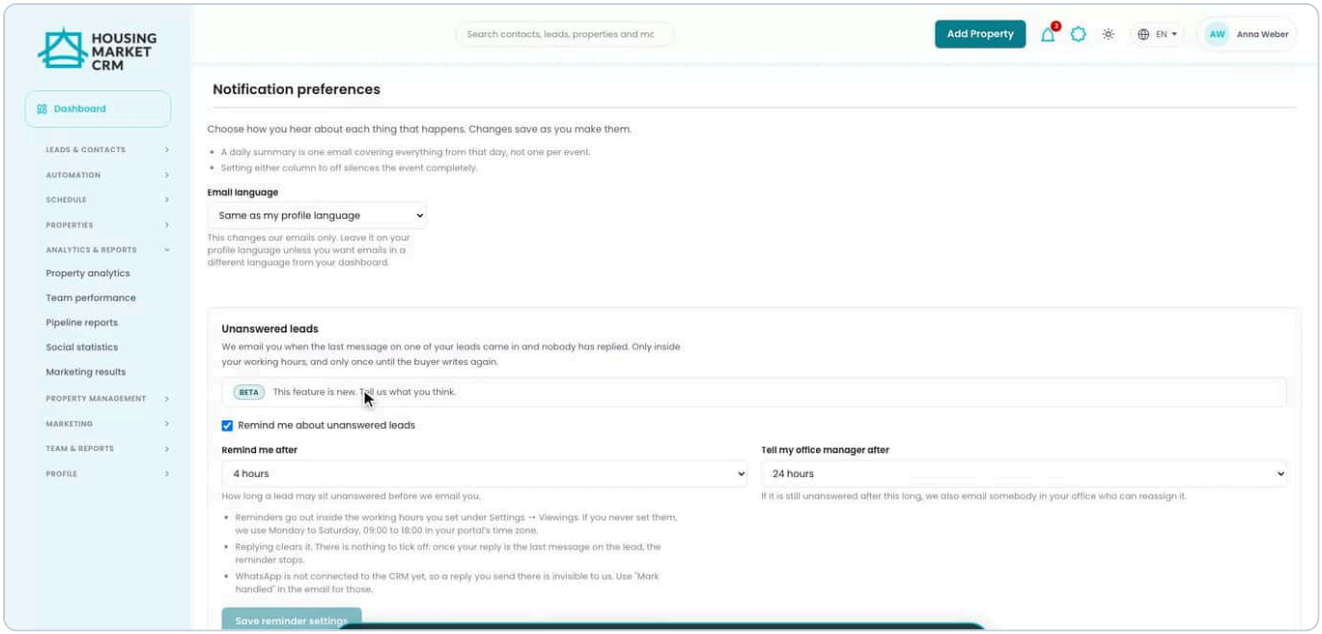


Figure 10.5 · Screen recorded 5 November 2026

6 The markers **go away by themselves** after a while. The feature stays exactly as it was.

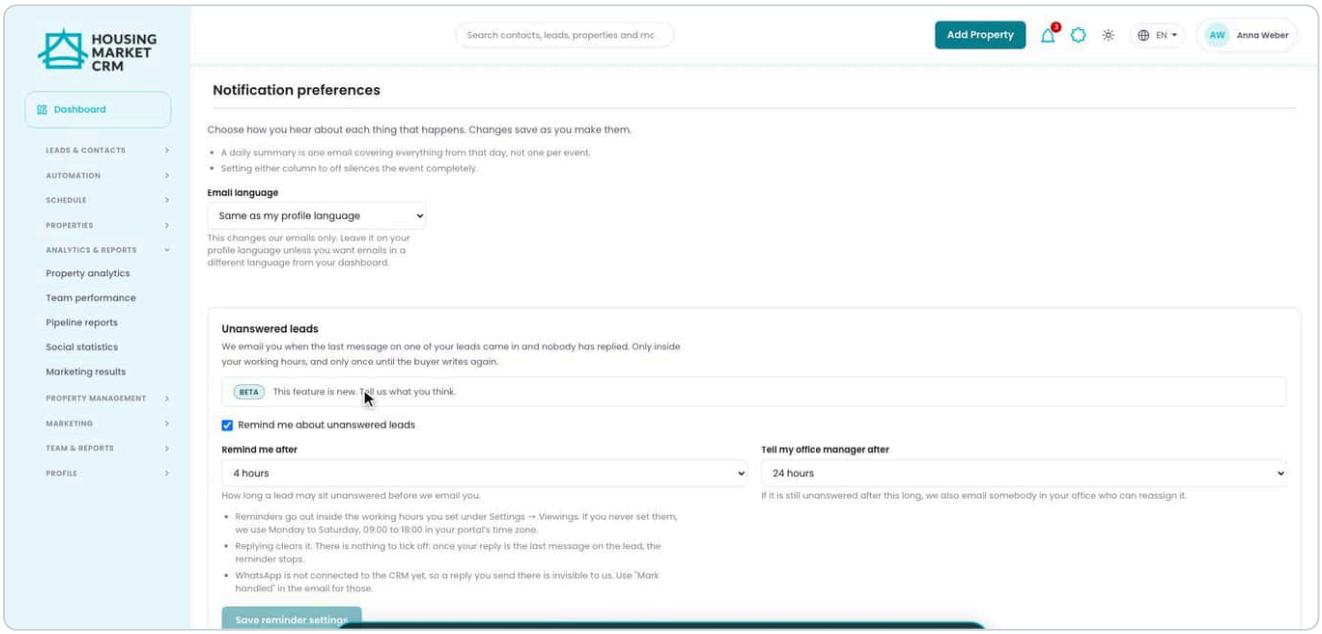


Figure 10.6 · Screen recorded 5 November 2026

7 You will see the same markers in **every Housing Market product**.

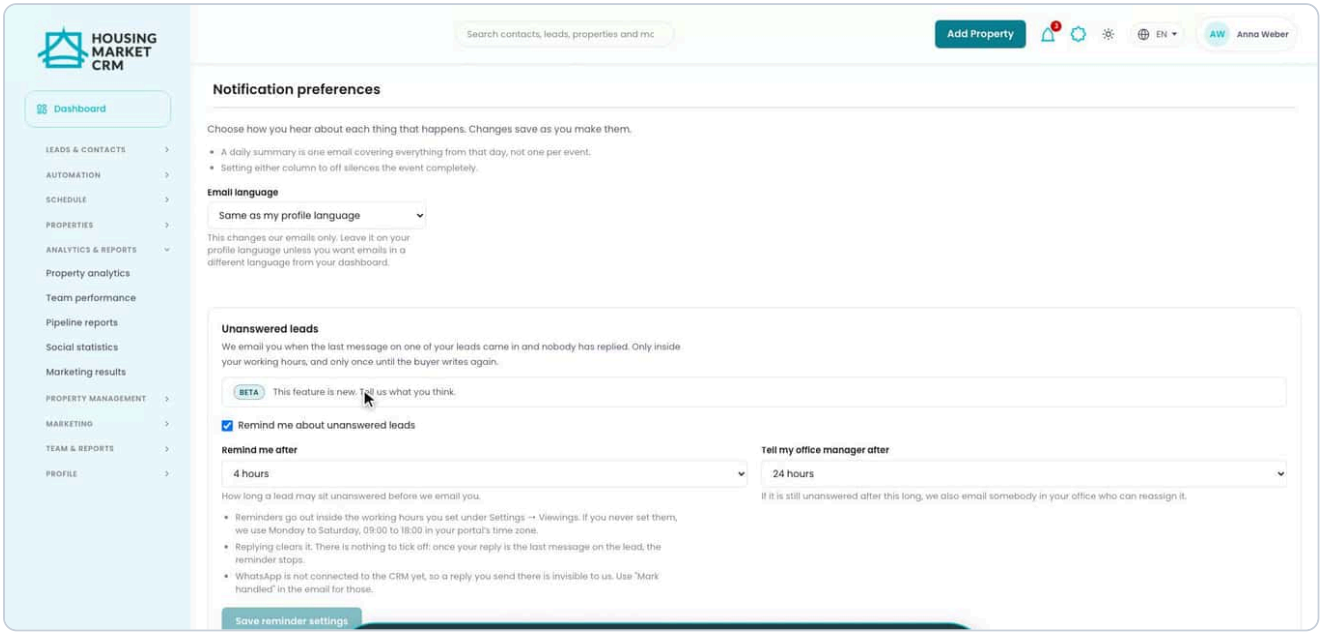


Figure 10.7 · Screen recorded 5 November 2026

RELATED HELP CENTER ARTICLES

What is Housing Market CRM?	faq.housingmarketgroup.com/faq/what-is-housing-market-crm

11 CHAPTER 11

Link in bio: one link for your social profiles

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

One link for your social profiles. It opens a light page with your photo, rating, latest reviews, live listings and ways to reach you.

Open your profile in the CRM and find Link in bio. Add a line under your name, switch the page on, and copy your link into the bio of your social accounts. The address is made by the system and stays the same if you switch the page off and on again.

The page shows your photo, name, title and company, your verified badge if you have one, your rating, up to six of your live listings and your three latest reviews. Every listing and the button to your full profile open on the portal, where visitors can enquire.

Your phone number and email address are not on the page unless you turn them on, one at a time. Search engines do not list the page, and switching it off makes the address stop working.

An enquiry made within 30 days of a visit from your link, on the same device, is marked as coming from it, and your profile shows how many came. Visits to the page itself are not counted. The link-in-bio page is part of every plan, Free included.

From the Help Center: **What is the link-in-bio page?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

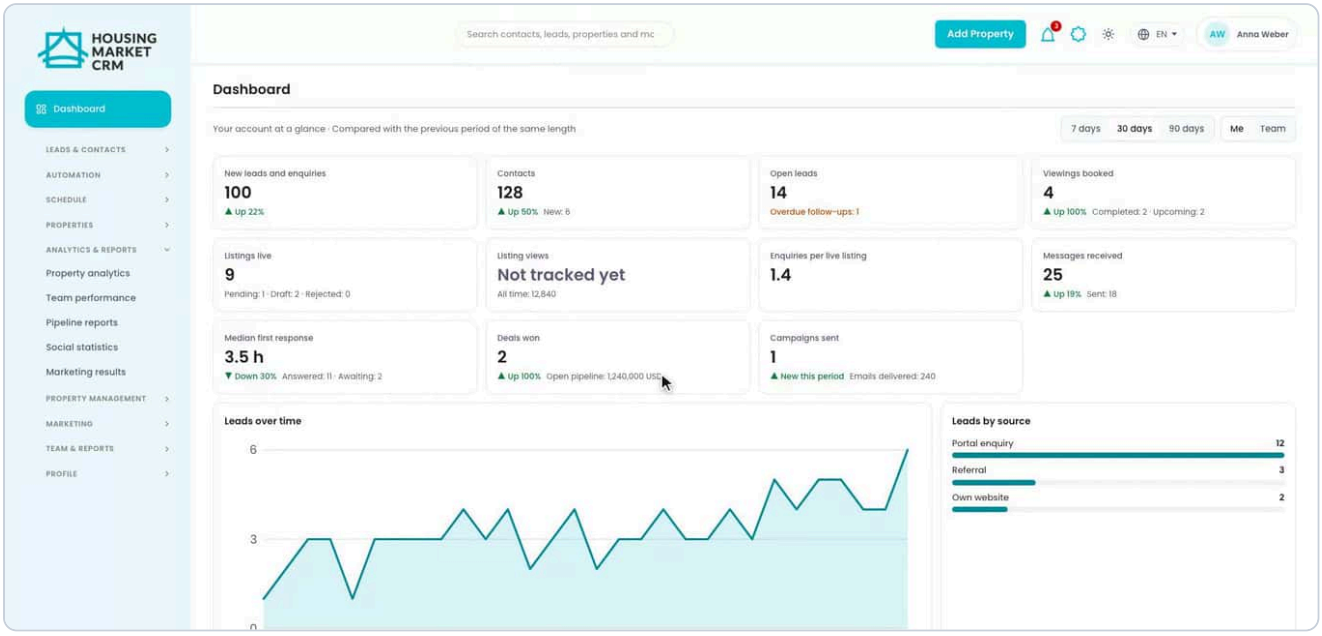


Figure 11.1 · Screen recorded 4 November 2026

2 Open **Profile** in the left menu.

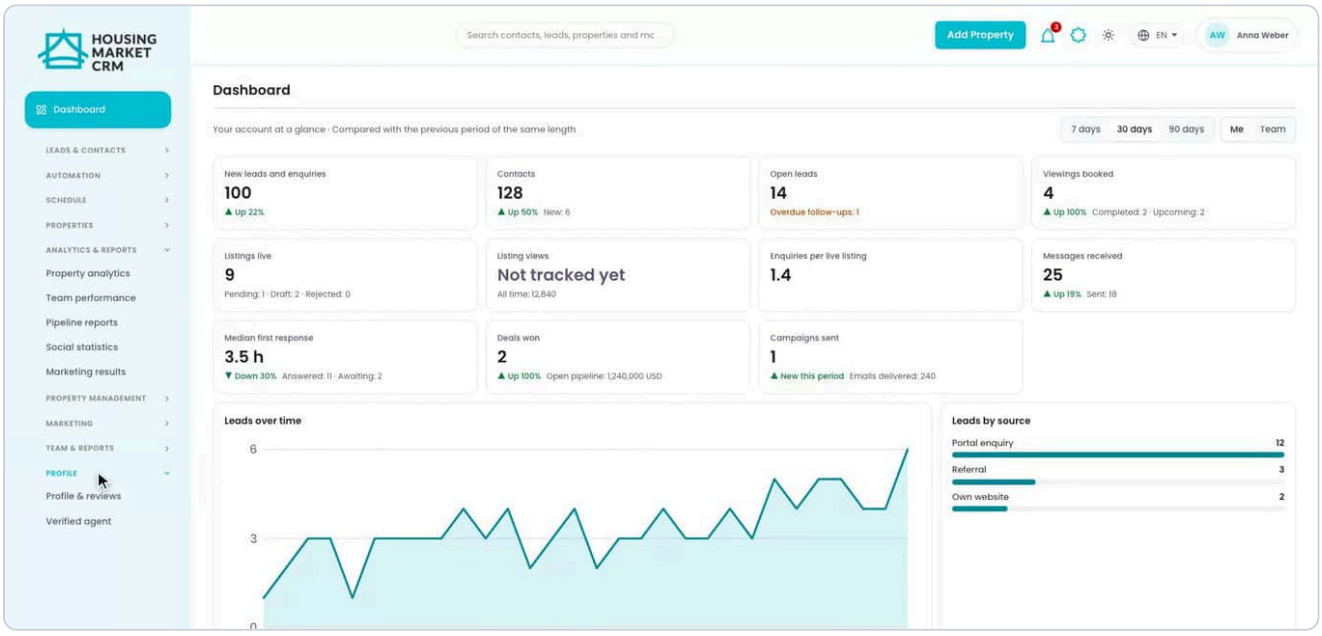


Figure 11.2 · Screen recorded 4 November 2026

3 Click **Profile & reviews.**

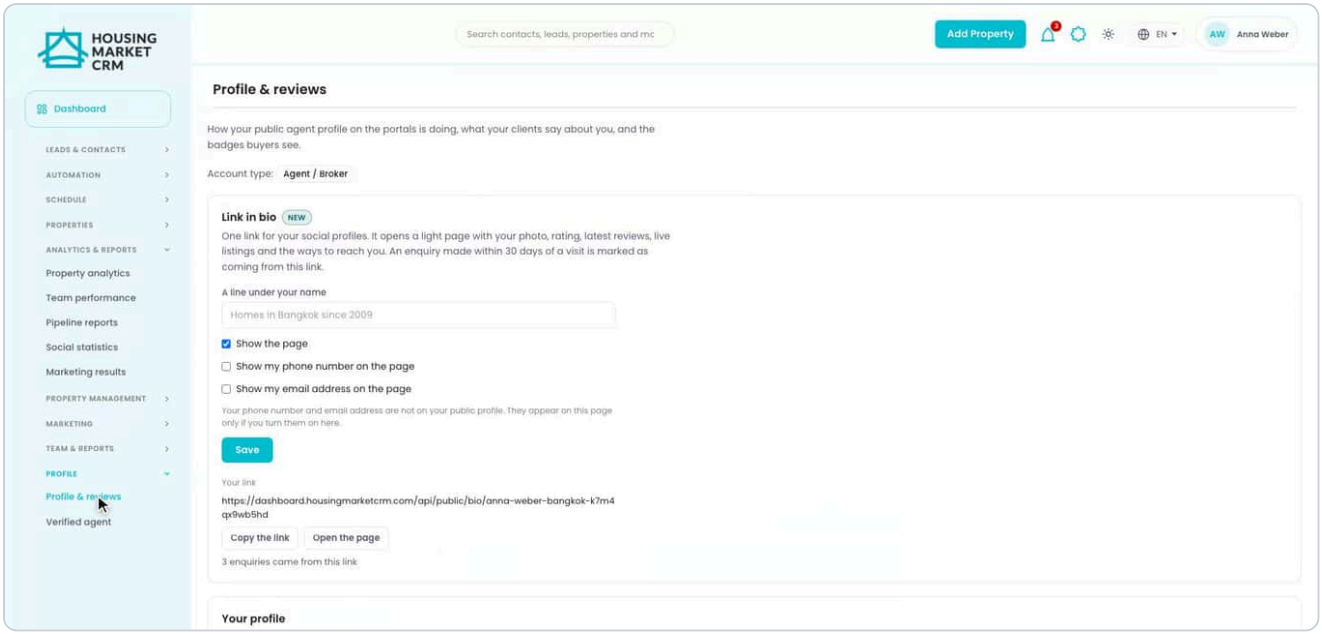


Figure 11.3 · Screen recorded 4 November 2026

4 Scroll to **Link in bio.**

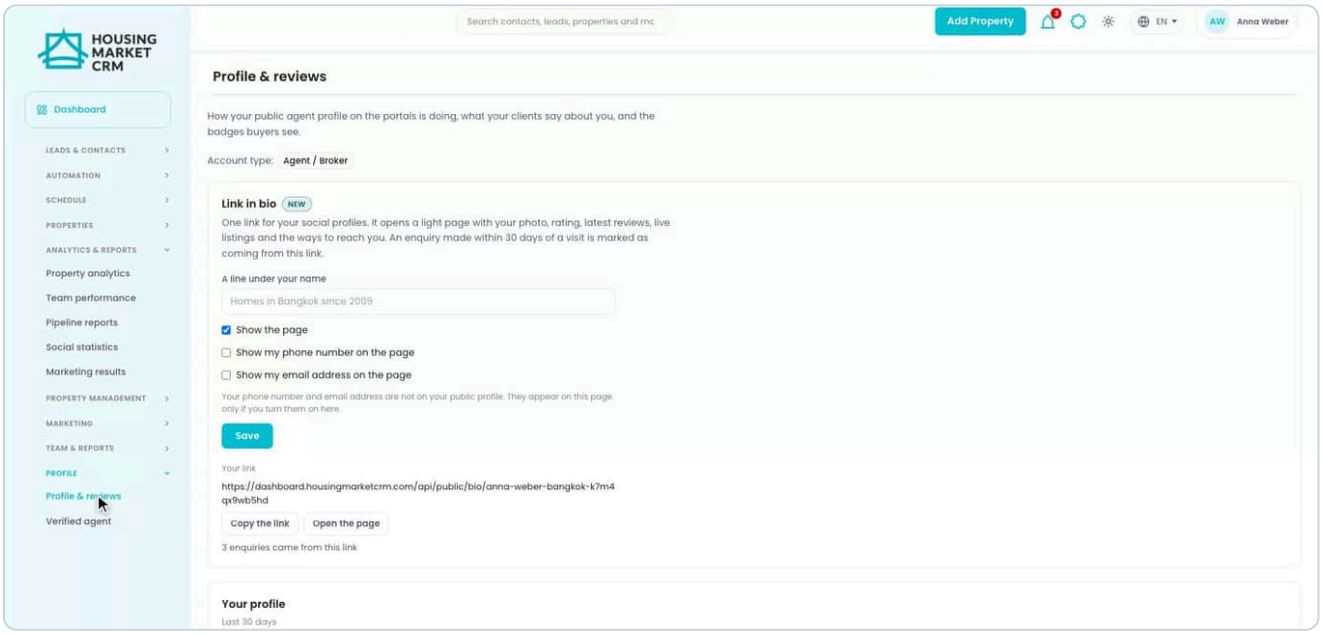


Figure 11.4 · Screen recorded 4 November 2026

5 One link for your social profiles. It opens a light page about you.

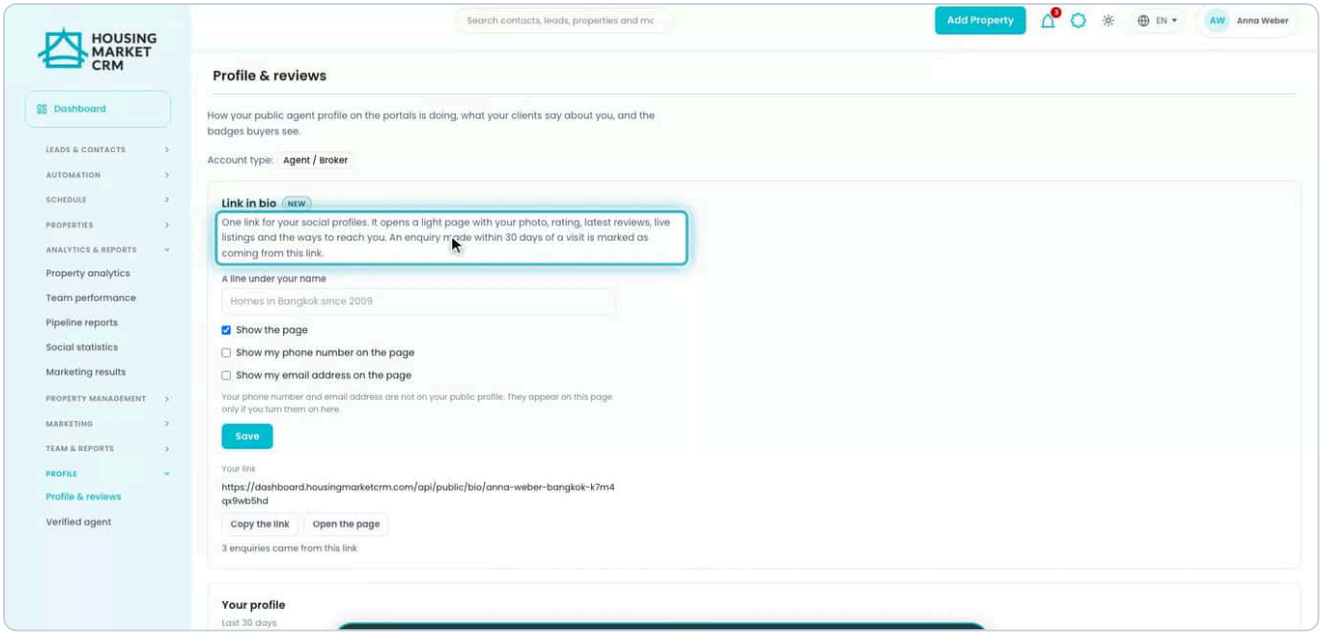


Figure 11.5 · Screen recorded 4 November 2026

6 Add a line under your name.

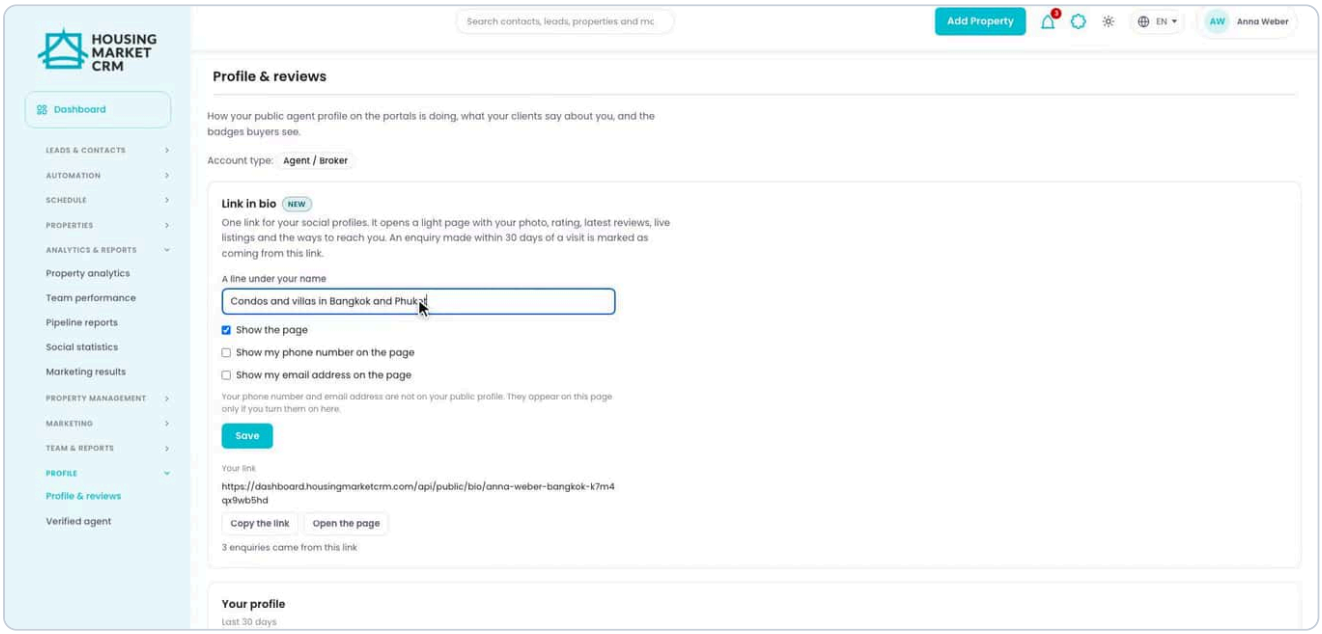


Figure 11.6 · Screen recorded 4 November 2026

7 **Show the page** is on, so the link works.

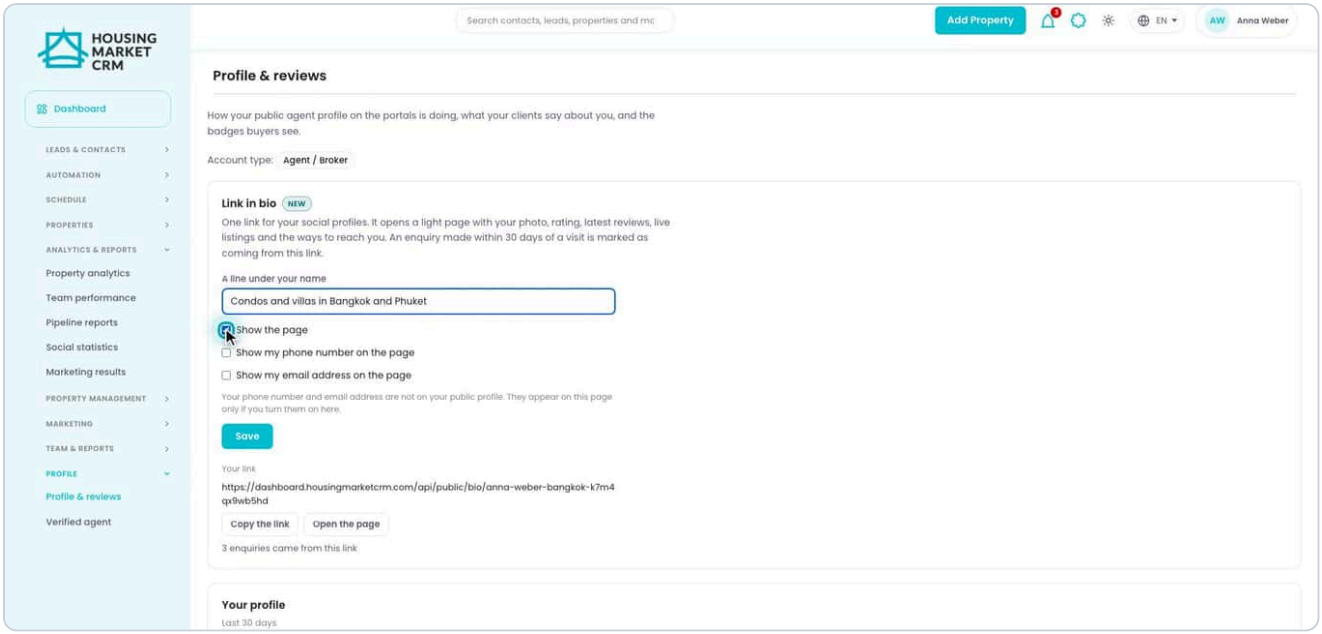


Figure 11.7 · Screen recorded 4 November 2026

8 Your **phone** and **email** stay off until you turn them on here.

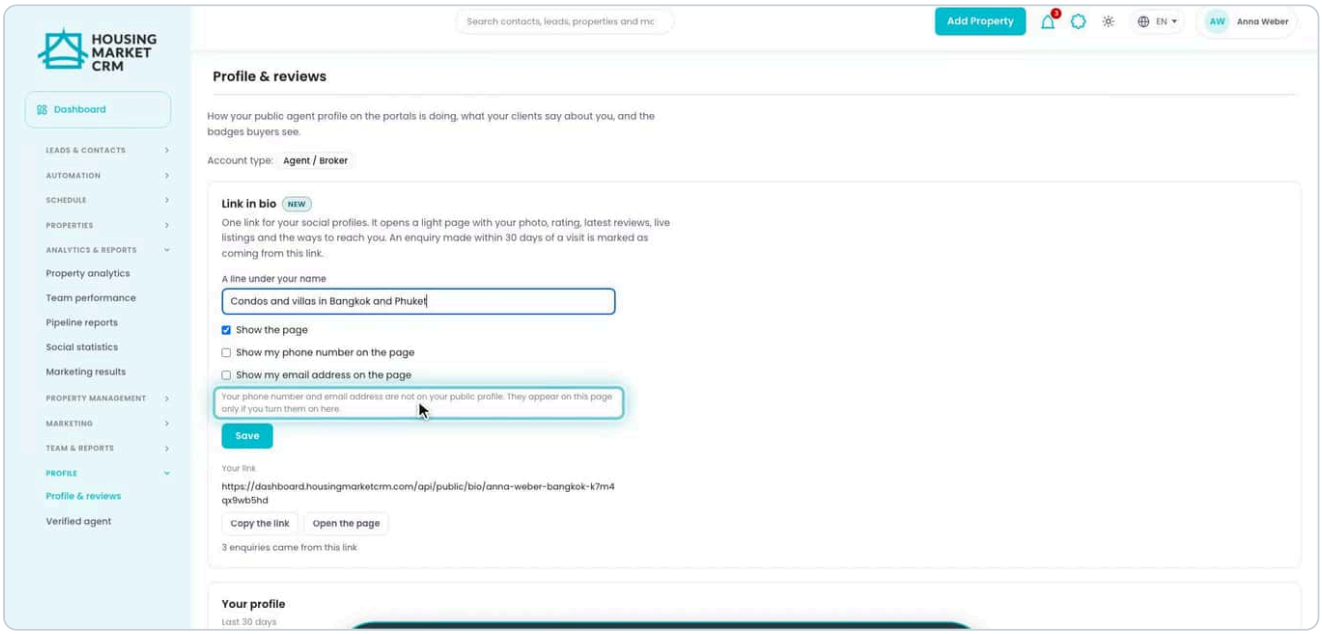


Figure 11.8 · Screen recorded 4 November 2026

9 Tick **Show my phone number** if you want people to call you.

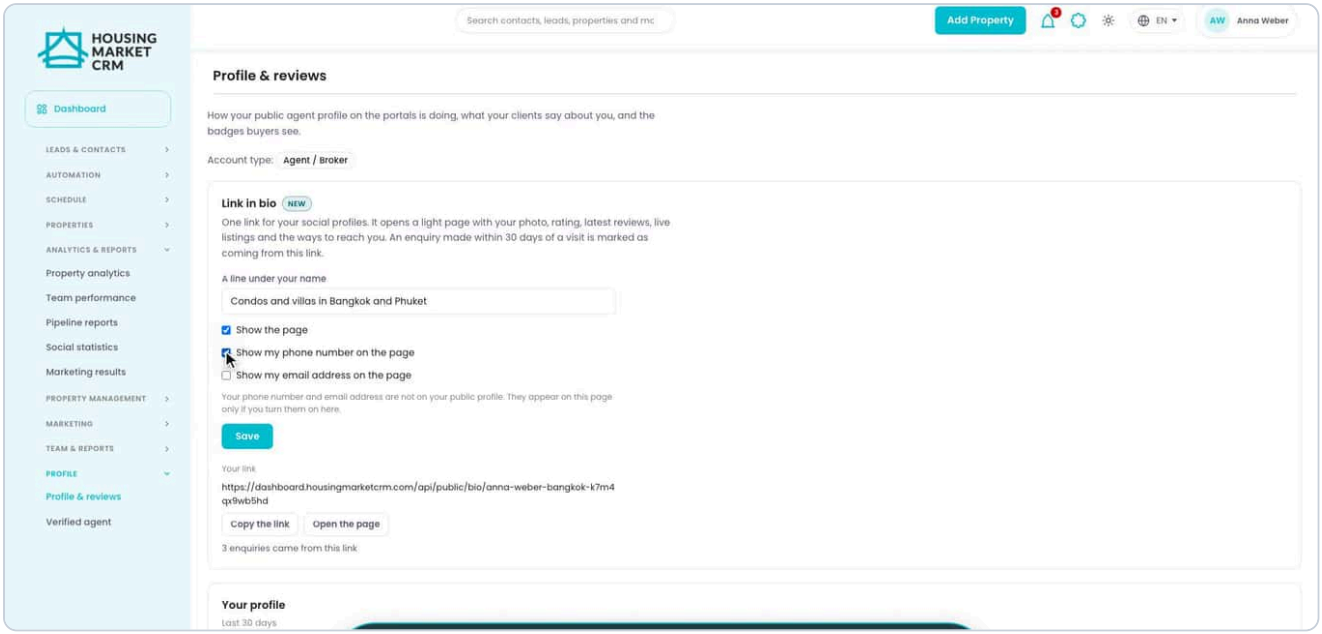


Figure 11.9 · Screen recorded 4 November 2026

10 Click **Save**.

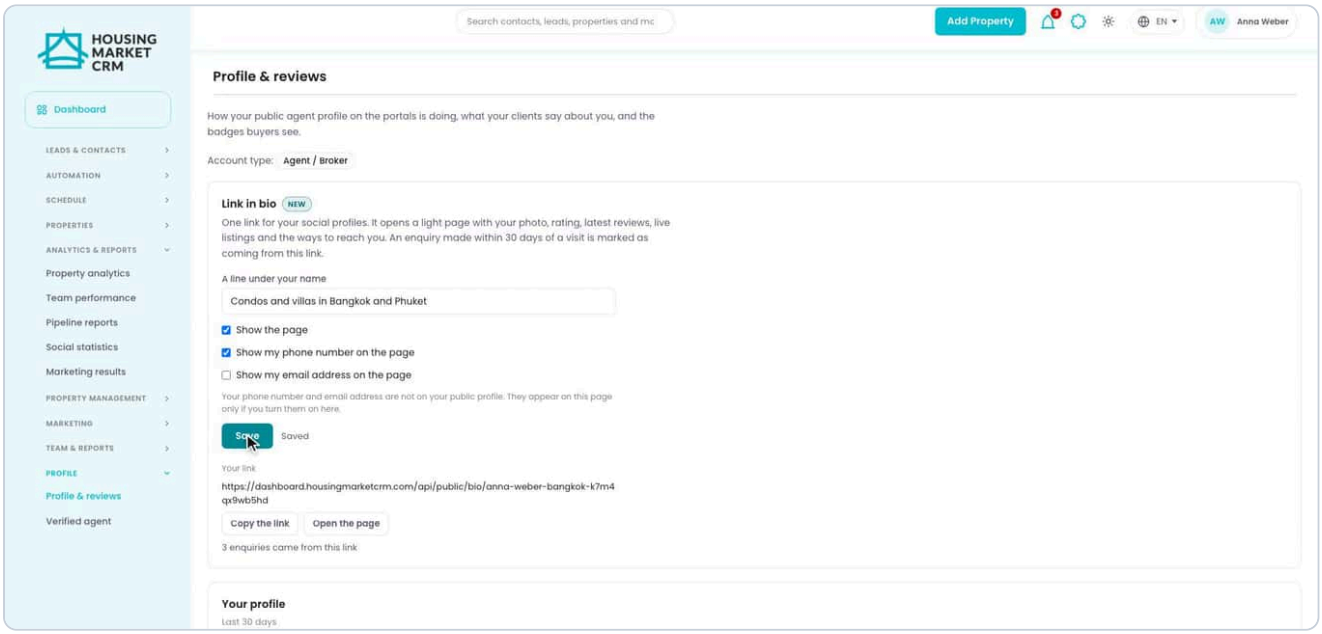


Figure 11.10 · Screen recorded 4 November 2026

11 Your page is **saved**.

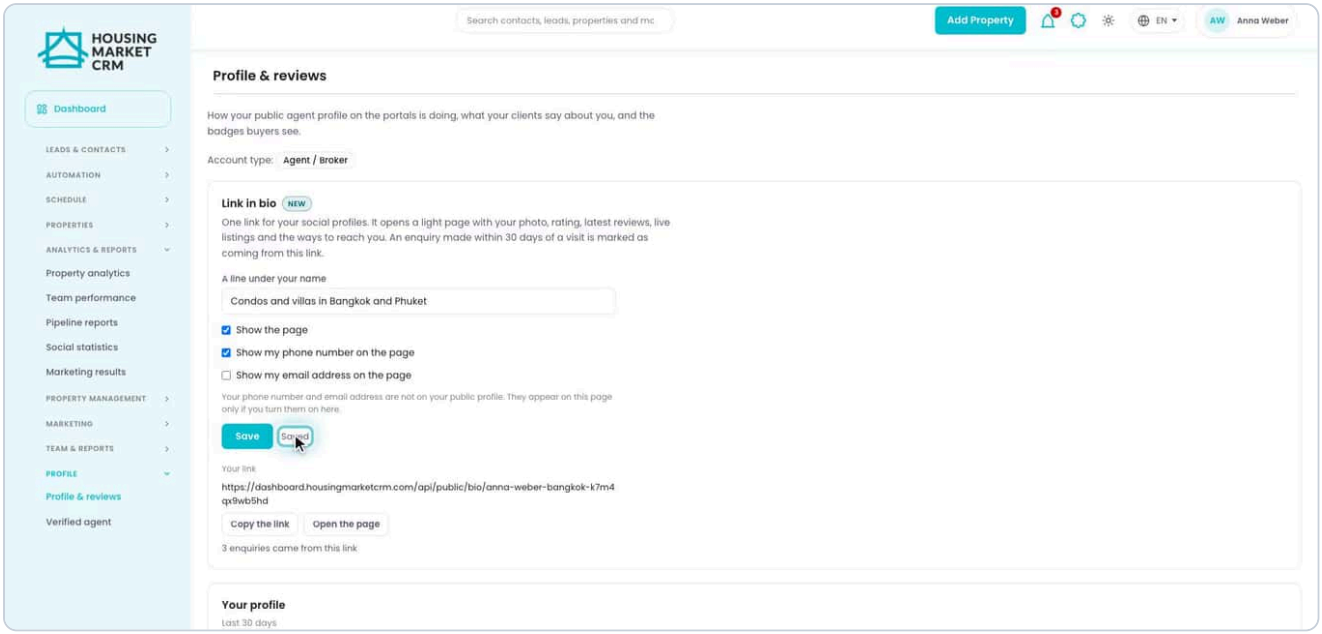


Figure 11.11 · Screen recorded 4 November 2026

12 Your link is ready to **copy**.

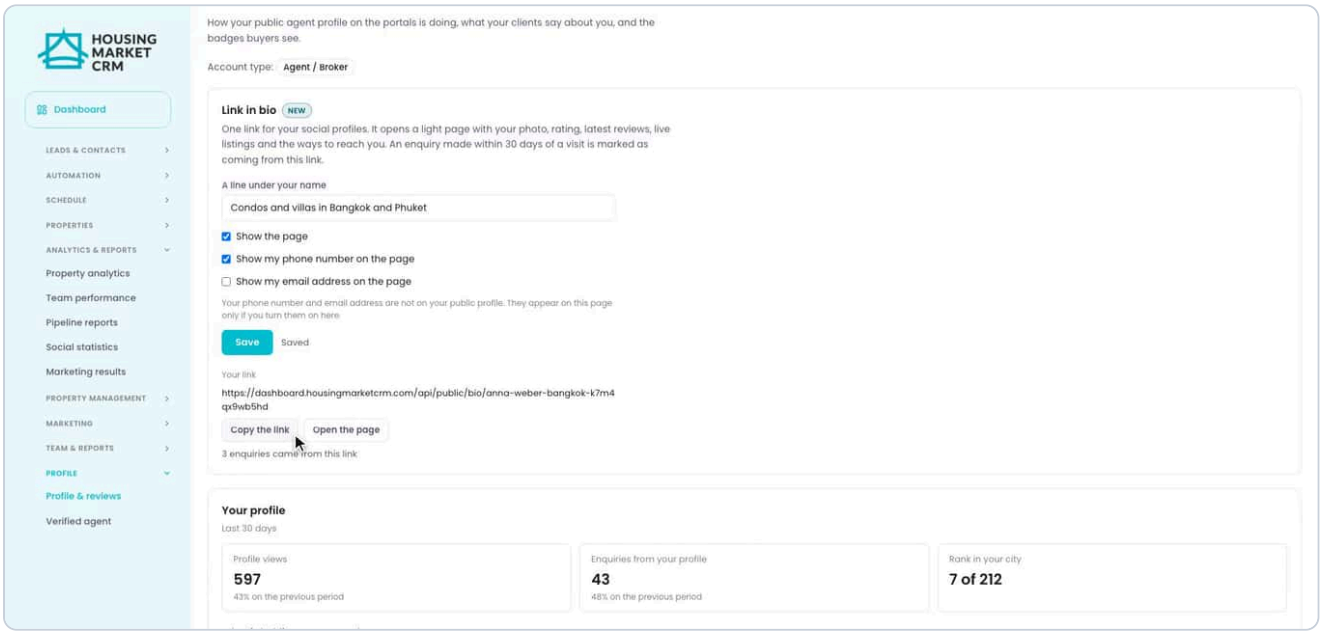


Figure 11.12 · Screen recorded 4 November 2026

13 Paste it into the **bio** of each social profile.

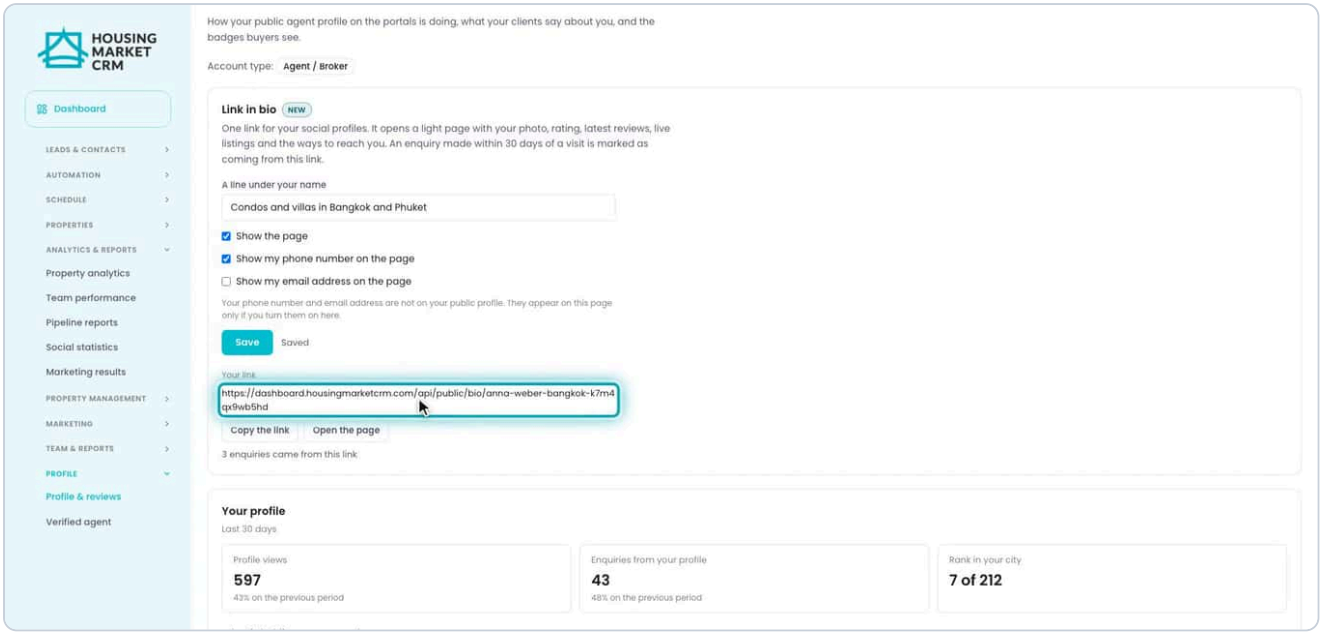


Figure 11.13 · Screen recorded 4 November 2026

14 Click **Copy the link**.

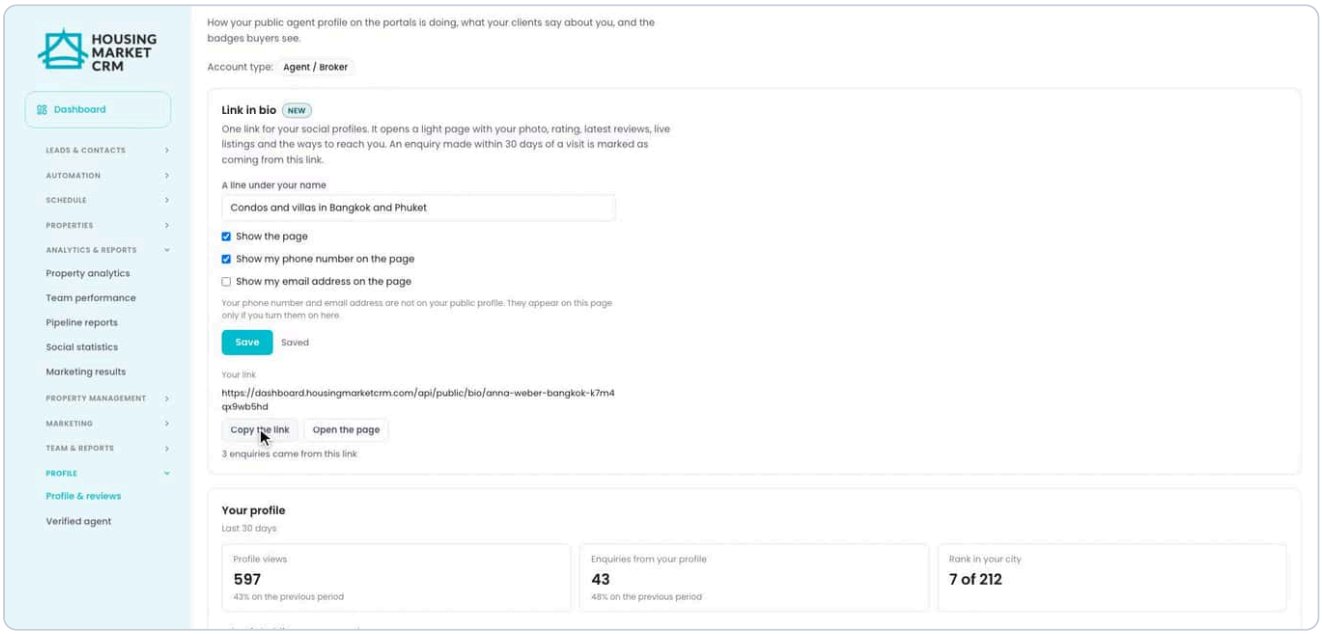


Figure 11.14 · Screen recorded 4 November 2026

15 See how many **enquiries** came from it.

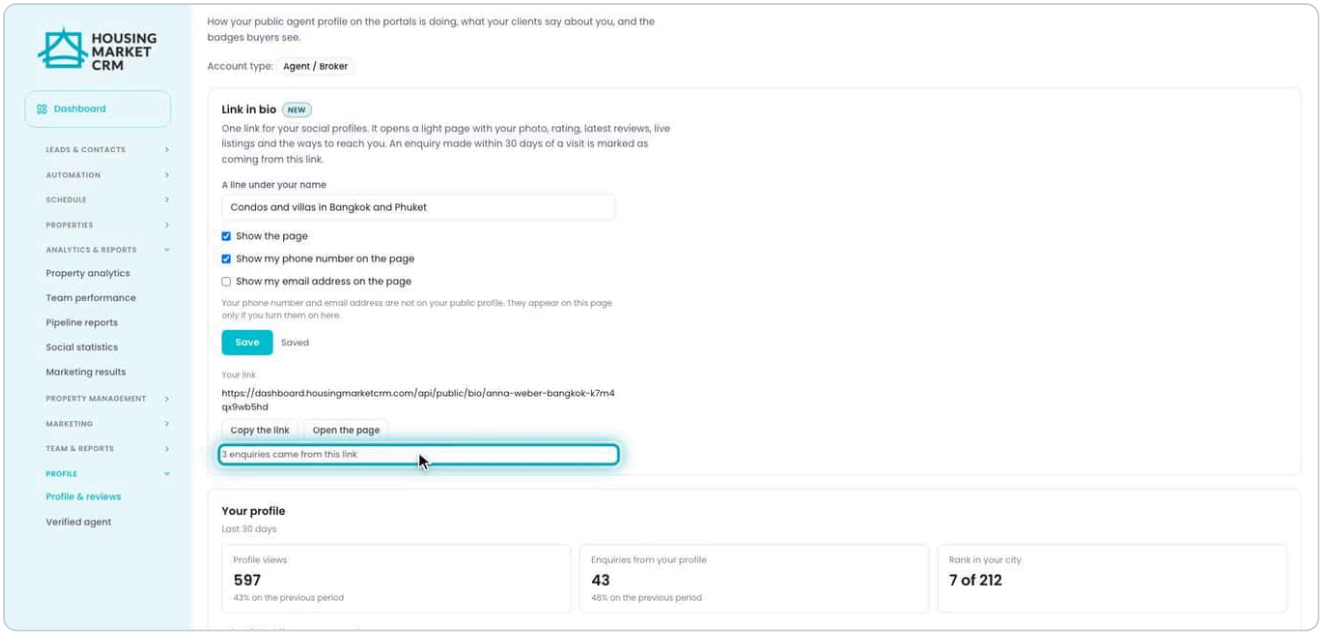


Figure 11.15 · Screen recorded 4 November 2026

16 An enquiry within **30 days** of a visit is marked as coming from this link.

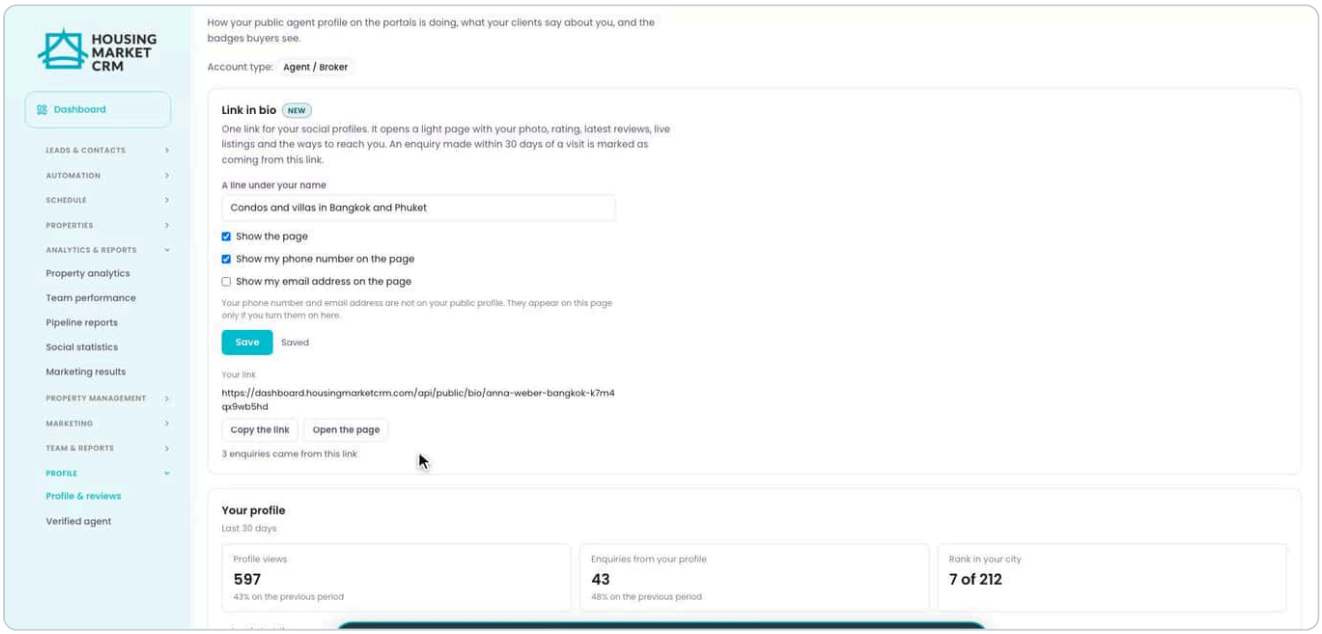


Figure 11.16 · Screen recorded 4 November 2026

RELATED HELP CENTER ARTICLES

How do I update my profile? — faq.housingmarketgroup.com/faq/how-do-i-update-my-profile

PART 2

Leads and contacts

12 The lead board
13 Add a lead manually
14 Work with a lead
15 Link a lead to a property
16 Reply to a lead
17 See interested buyers
18 Lead scoring
19 Reverse matching
20 Follow-up sequences
21 Keep cold leads warm
22 Buy a seller lead
23 Add a contact
24 Import contacts
25 Import leads and deals from a file
26 Scan a business card
27 The contact timeline
28 Merge duplicate contacts
29 Your follow-ups list
30 Log a call on a contact
31 Fix an email address that bounced
32 Relocation leads: read the requirements

12 CHAPTER 12

The lead board

All plans | For agents | Watch the video

OVERVIEW

Yes, on a Kanban board with five fixed columns: New Task, Showing, Negotiating, Deal Closed and Lost Deal. The columns cannot be renamed or added to.

In the sidebar, open Tasks and drag a lead across the board through its columns:

- New Task
- Showing
- Negotiating
- Deal Closed
- Lost Deal

There are two other axes beside the stage, and they are what the board filters on: a status (new, call back, message back, closed) and whether the lead is a sale or a rental. A lead nobody has touched for a while also raises a notification of its own rather than waiting to be noticed.

From the Help Center: **Can I organize leads into different stages?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

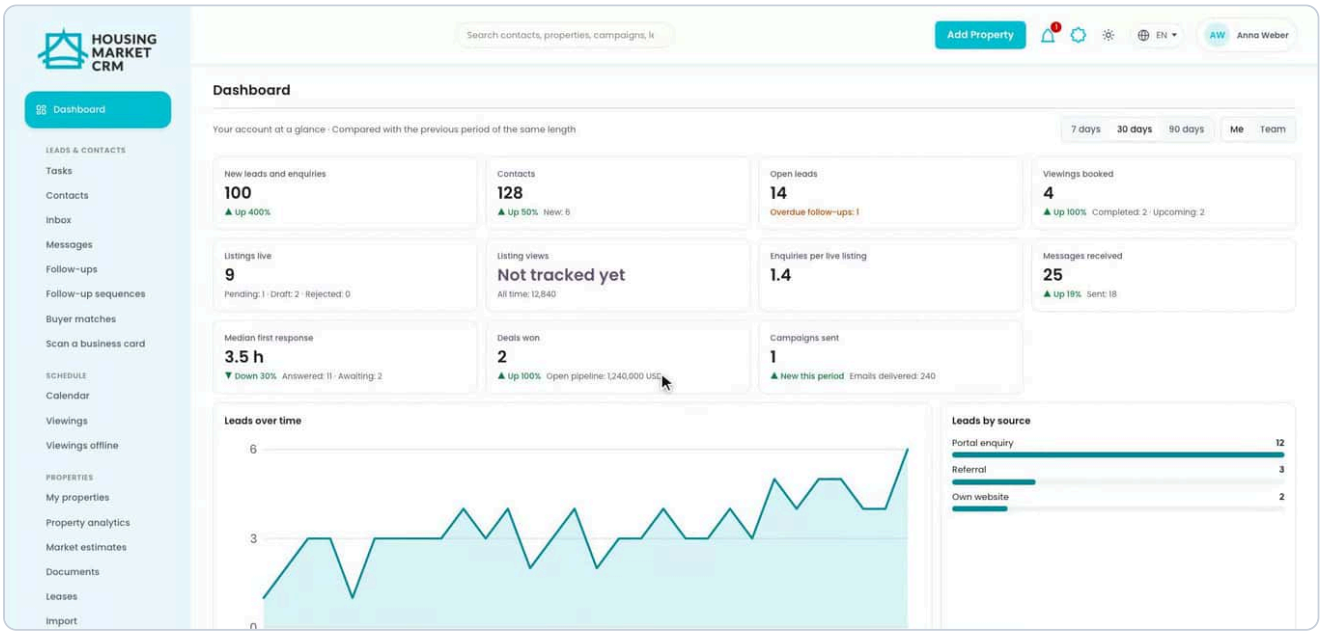


Figure 12.1 · Screen recorded 17 September 2026

2 Click **Tasks** in the left menu.

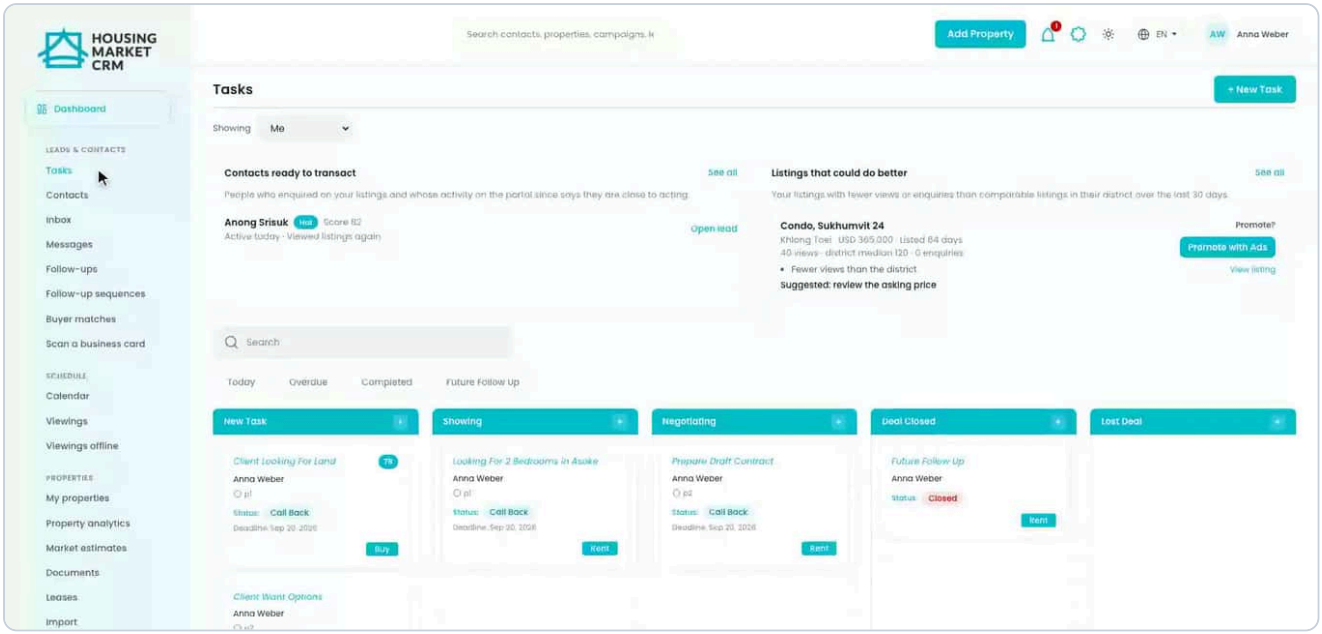


Figure 12.2 · Screen recorded 17 September 2026

3 New enquiries start in **New Task**.

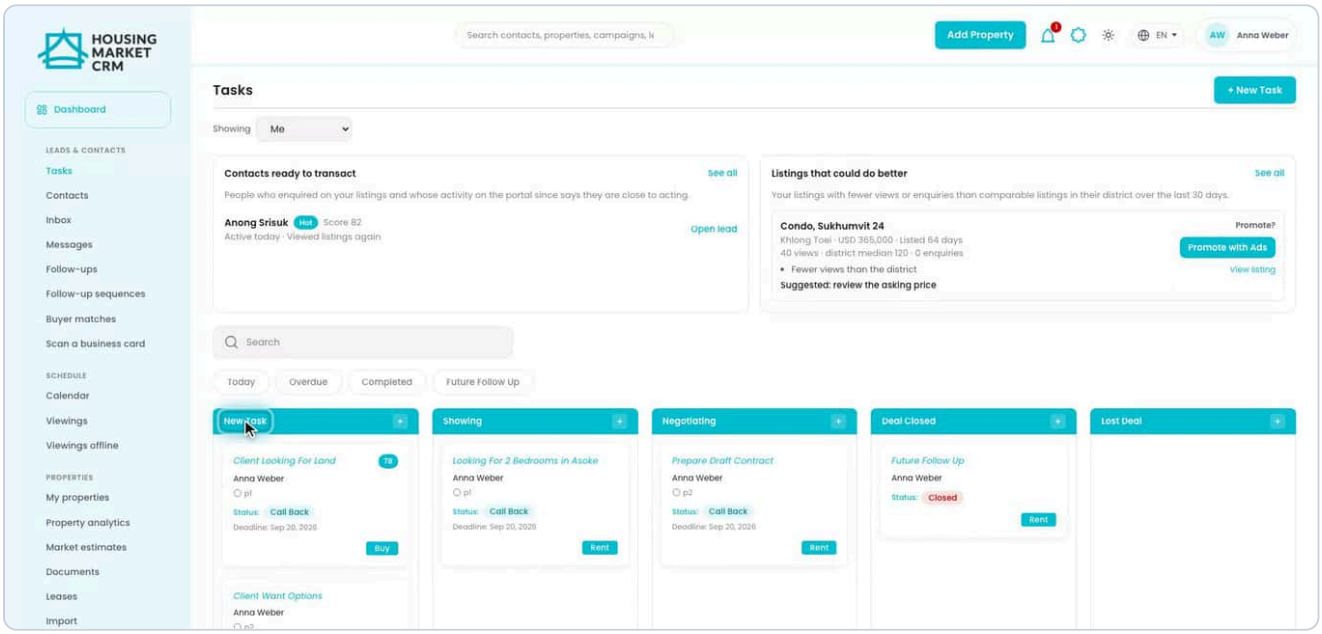


Figure 12.3 · Screen recorded 17 September 2026

4 Then **Showing** and **Negotiating** until a lead ends in **Deal Closed** or **Lost Deal**.

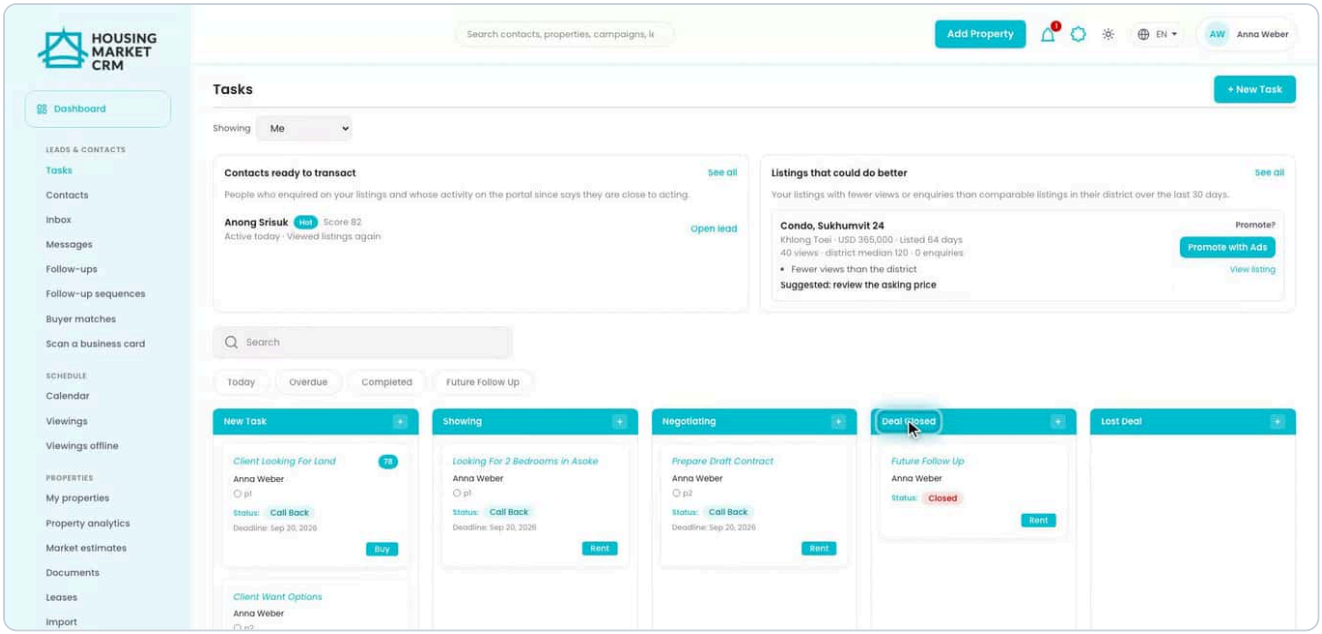


Figure 12.4 · Screen recorded 17 September 2026

5 Each card shows the **lead**, **contact**, **status** and **deadline**.

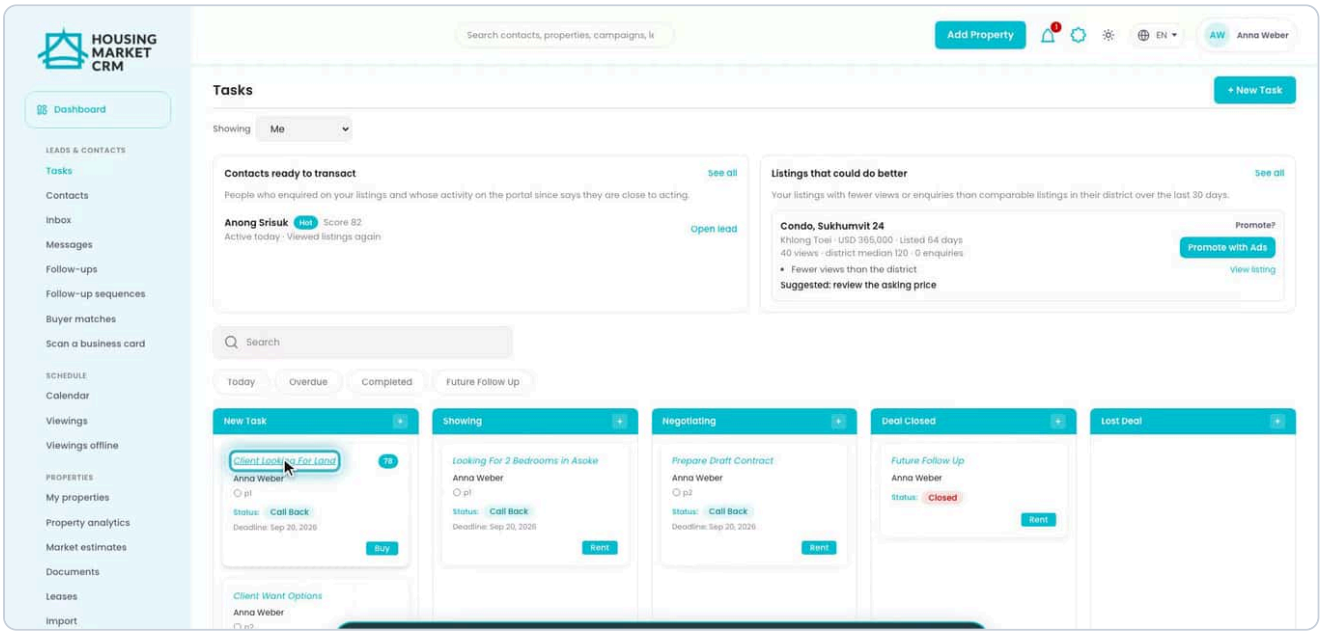


Figure 12.5 · Screen recorded 17 September 2026

6 Use **Overdue** to see who is waiting for you.

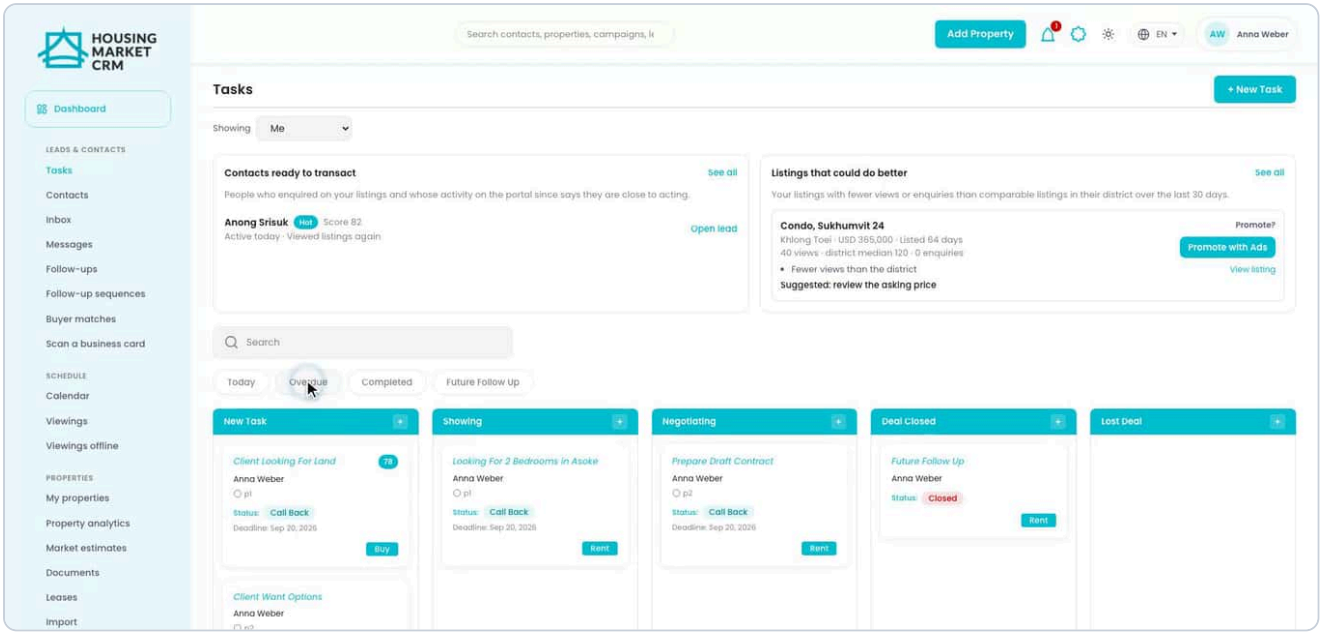


Figure 12.6 · Screen recorded 17 September 2026

7 Or **search** for a lead.

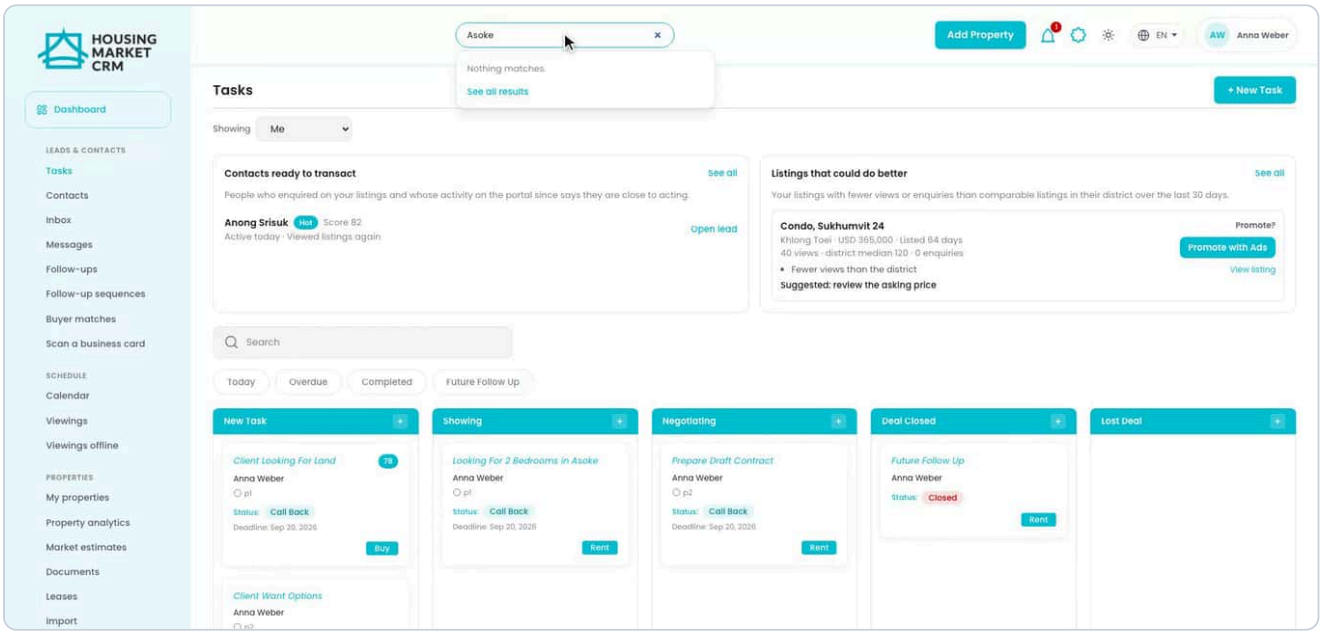


Figure 12.7 · Screen recorded 17 September 2026

8 Use + on a column to add a lead to that stage.

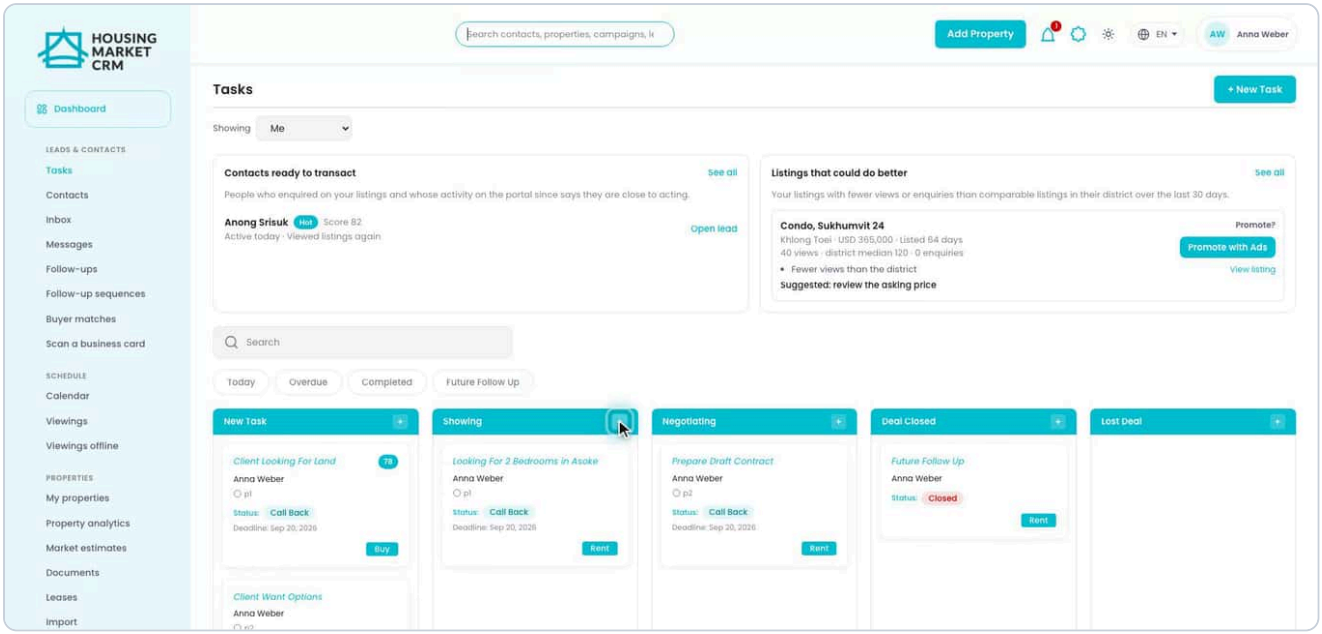


Figure 12.8 · Screen recorded 17 September 2026

9 Click a card to **open the lead**.

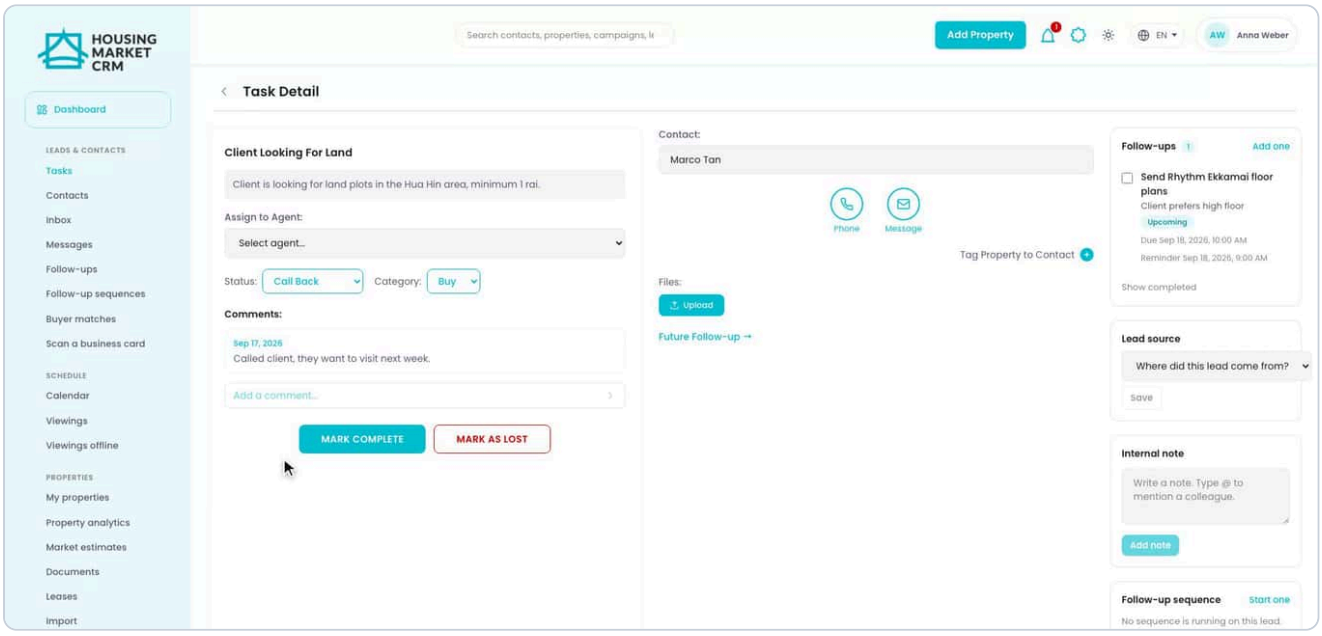


Figure 12.9 · Screen recorded 17 September 2026

10 The lead record opens with everything about this enquiry.

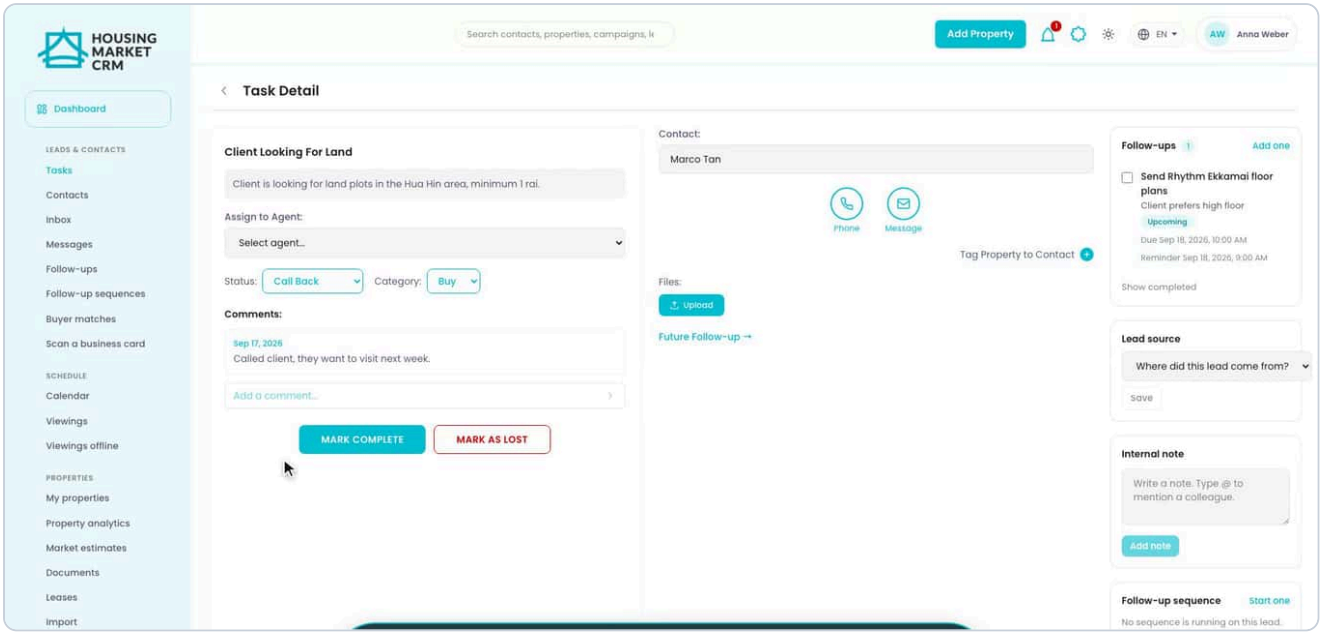


Figure 12.10 · Screen recorded 17 September 2026

GOOD TO KNOW

TIP

Yes. Every listing's enquiries land on the same board, and each lead still says which property it came from.

Help Center: Can I manage enquiries from multiple listings?

RELATED HELP CENTER ARTICLES

How are leads added to the CRM?	faq.housingmarketgroup.com/faq/how-are-leads-added-to-the-crm
Can I manage international leads?	faq.housingmarketgroup.com/faq/can-i-manage-international-leads

13 CHAPTER 13

Add a lead manually

All plans | For agents | Watch the video

OVERVIEW

Open Tasks and choose + New Task. Give the lead a title, pick or create its contact, and choose Save: it appears in the New Task column of your board.

Enquiries from your portal listings arrive as leads on their own. For a buyer who phoned, walked in or was introduced to you, add the lead yourself: open Tasks in the left menu and choose + New Task above the board. The + at the top of a column does the same and starts the lead in that column.

The form

- Title — required. Name the lead so you recognise it on the board.
- Description — what they are looking for, in a line or two.
- Assign to Agent — who works the lead. Left empty, it is you.
- Contact — required. Search your contacts by name; if the person is not there yet, choose Create new contact.
- Interested Property — search the portal listings by address, area or city and pick the one they asked about.
- Status (New, Call Back, Message Back or Closed) and Category (Buy, Rent or Sell).
- Deadline — a date that puts the lead under the Today and Overdue filters above the board.
- Files — documents to keep with the lead.

Choose Save. The lead appears in the New Task column, or in the column you started from, and its timeline records that it was created.

The Reminder date on this form is stored with the lead but does not send you a notification. For a reminder, open the lead after saving and add a follow-up under Follow-ups — see "Does the CRM include reminders?".

From the Help Center: **How do I add a lead by hand?**

STEP BY STEP

1 Open **Tasks**, your lead board.

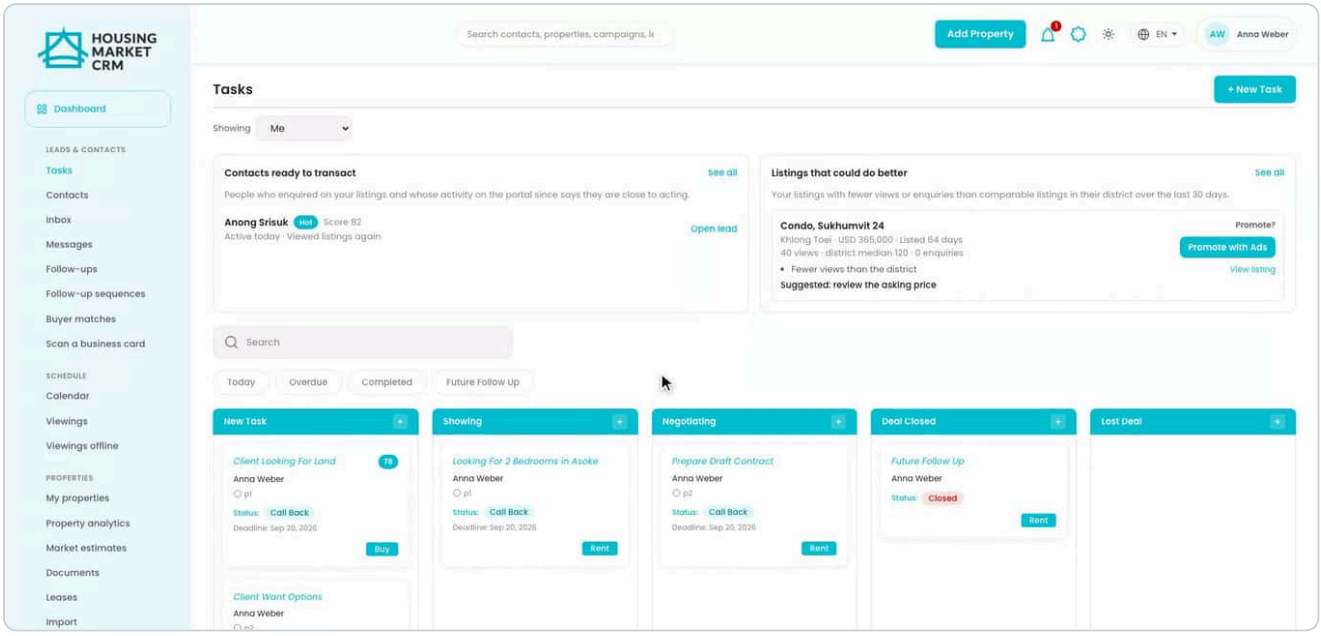


Figure 13.1 · Screen recorded 17 September 2026

2 Click **+ New Task**.

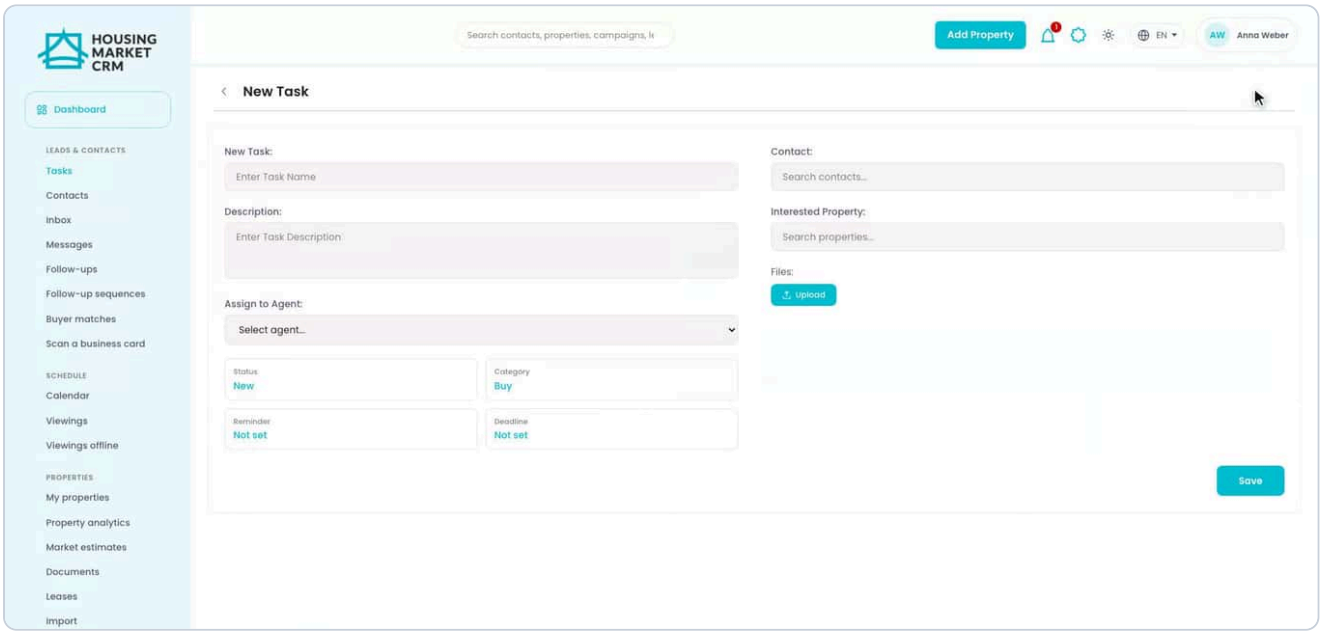


Figure 13.2 · Screen recorded 17 September 2026

3 Give the lead a clear **title**.

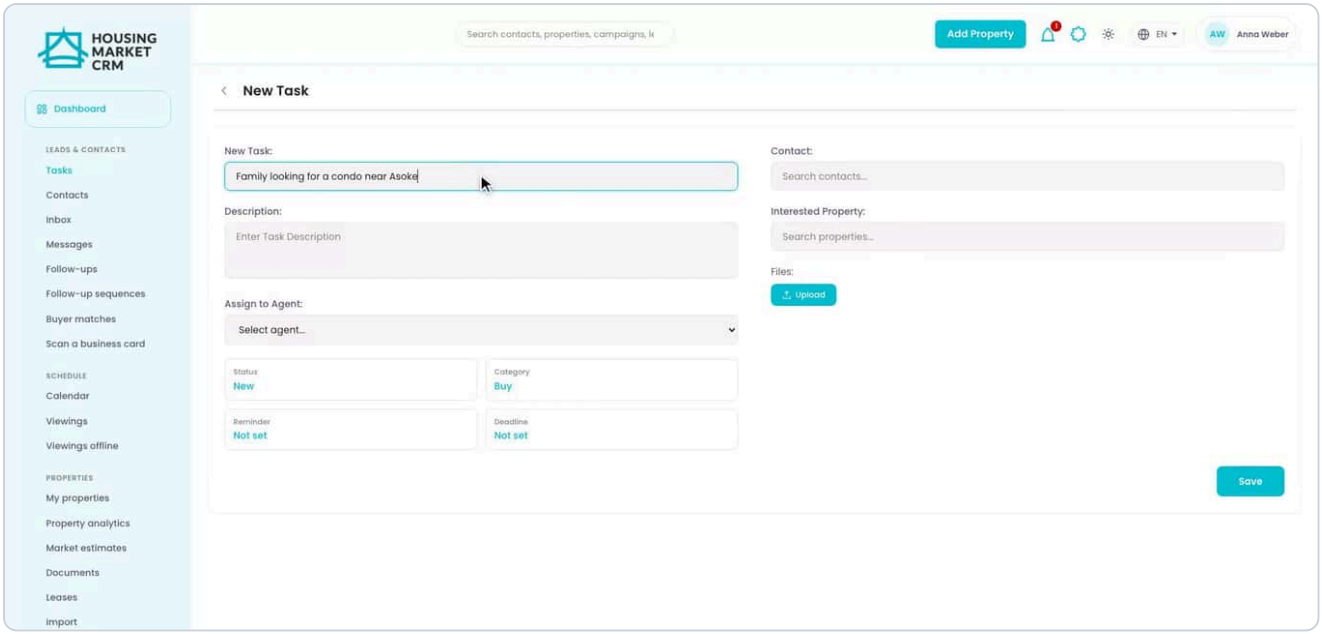


Figure 13.3 · Screen recorded 17 September 2026

4 Add a short **description**.

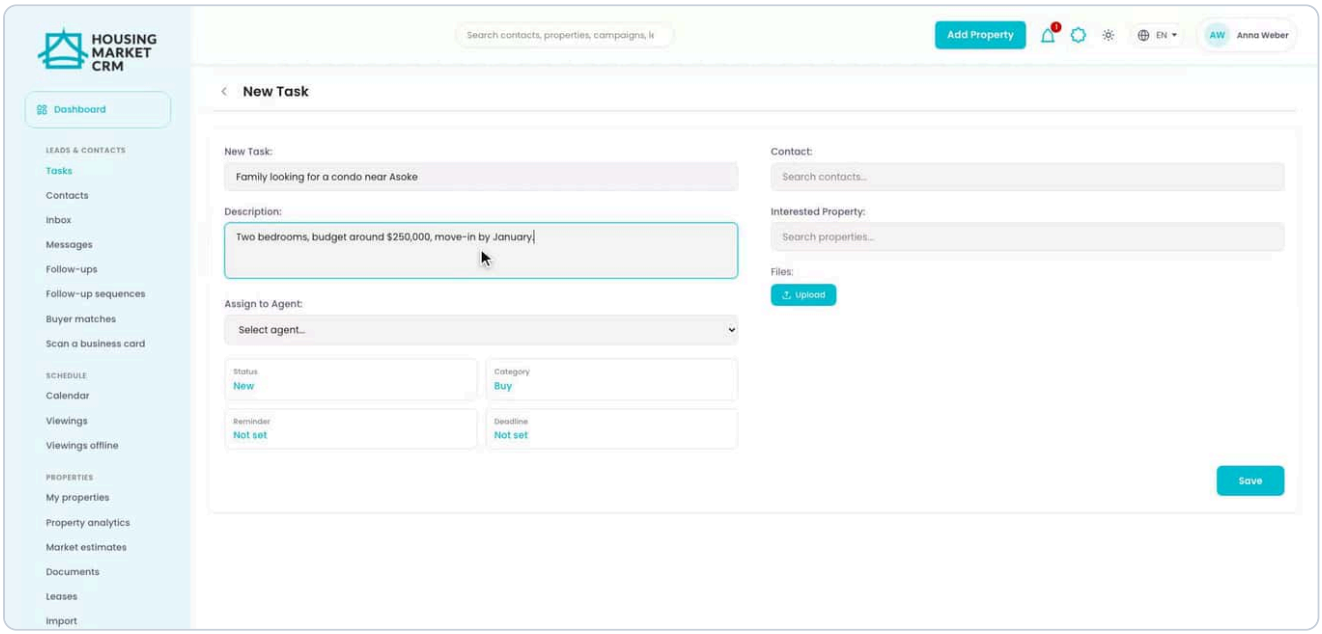


Figure 13.4 · Screen recorded 17 September 2026

5 Choose who **handles** the lead.

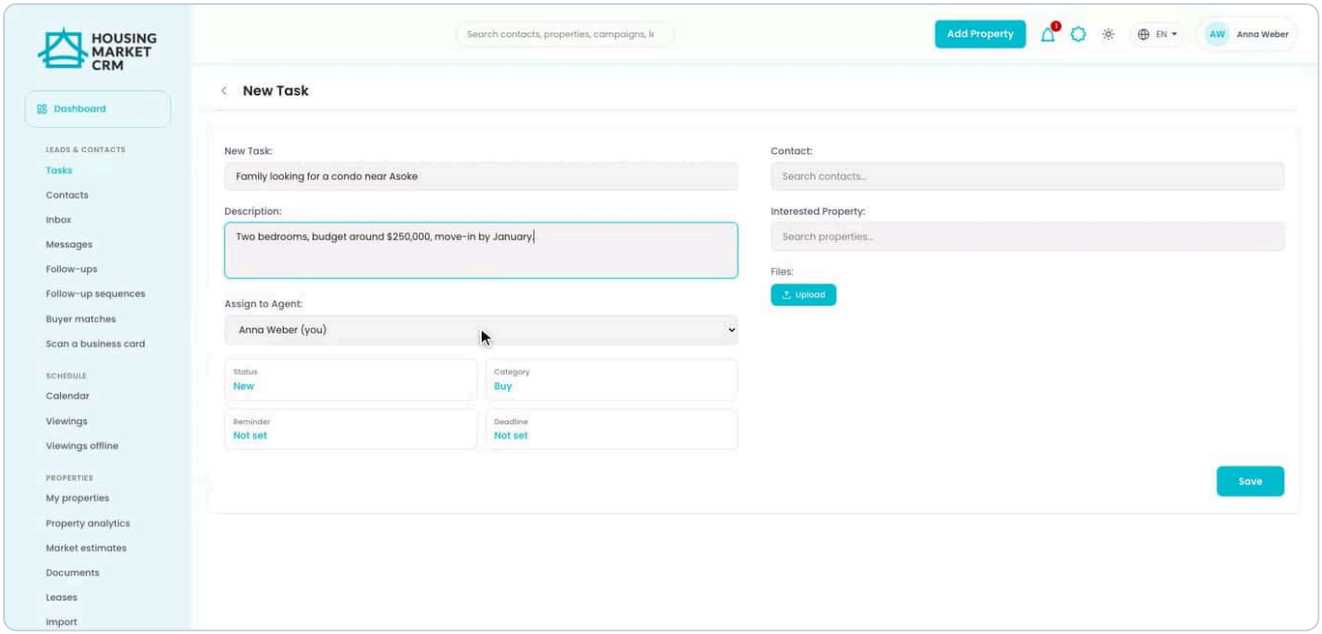


Figure 13.5 · Screen recorded 17 September 2026

6 Set a **deadline**.

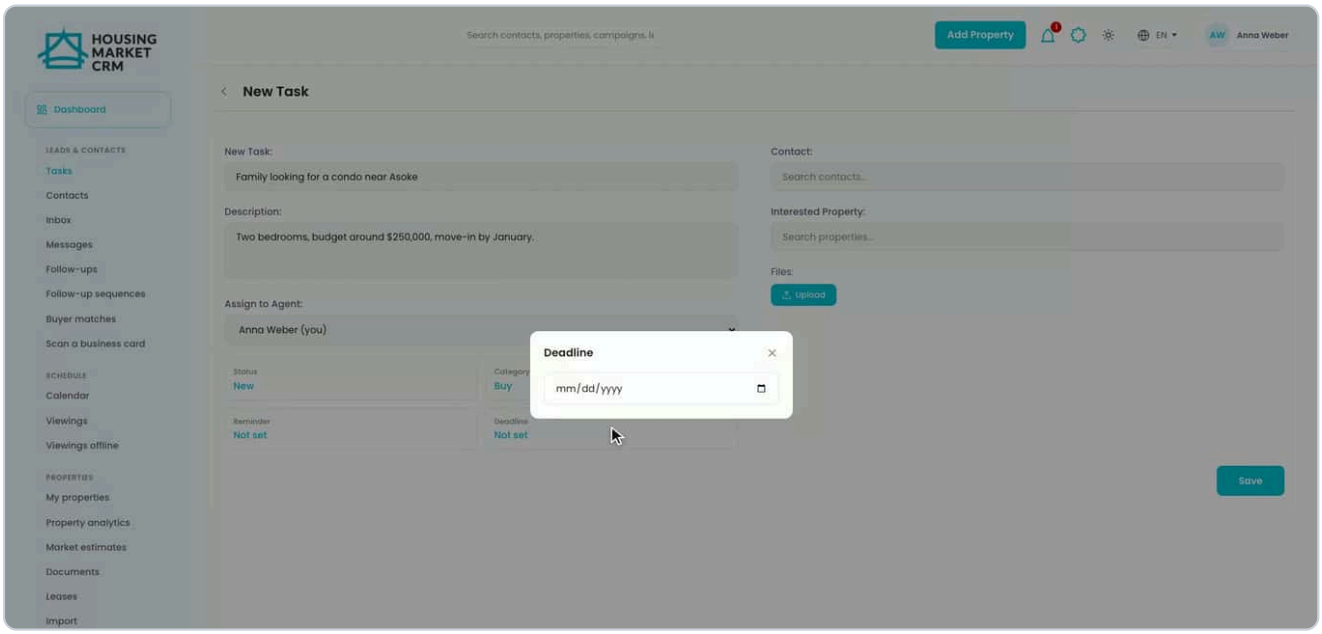


Figure 13.6 · Screen recorded 17 September 2026

7 Search for the **contact** and pick them from the list.

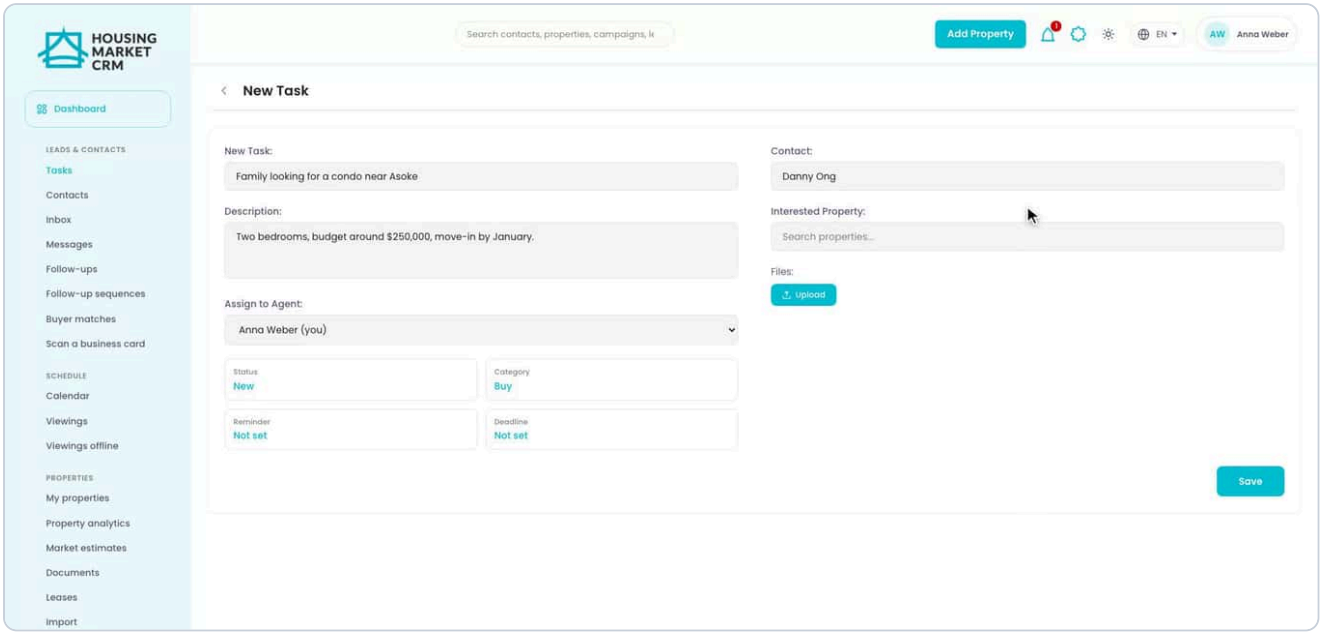


Figure 13.7 · Screen recorded 17 September 2026

8 Tag the **property** they are interested in.

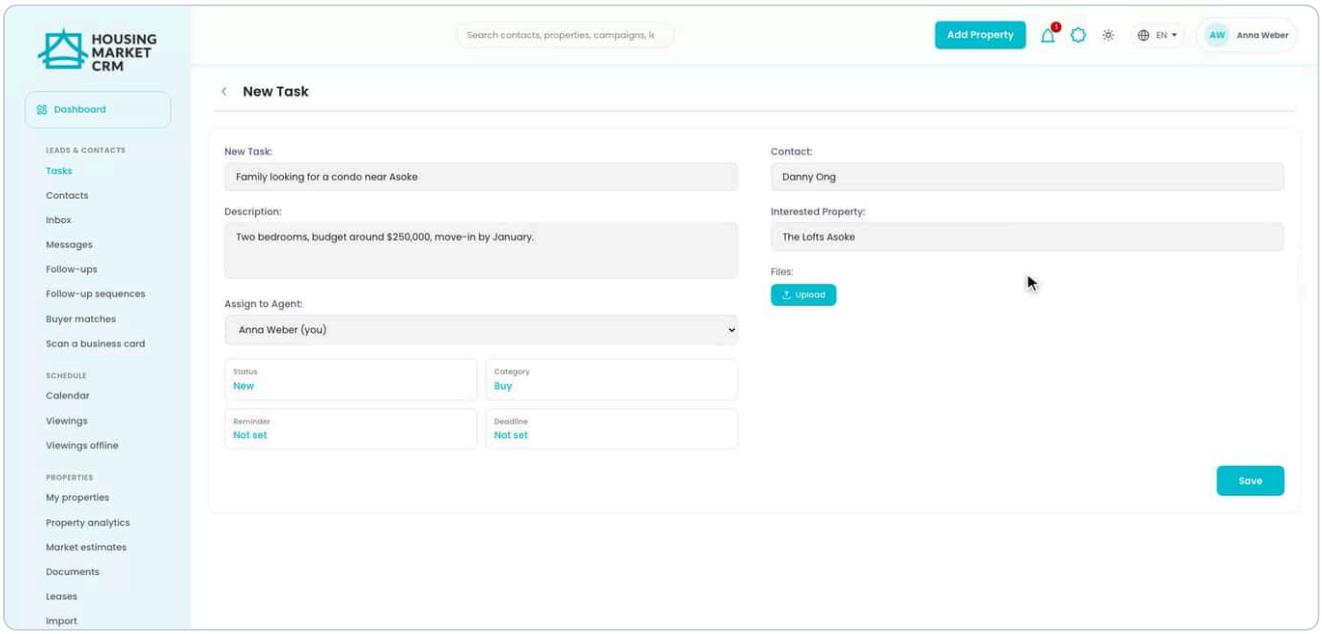


Figure 13.8 · Screen recorded 17 September 2026

9 Click **Save**.

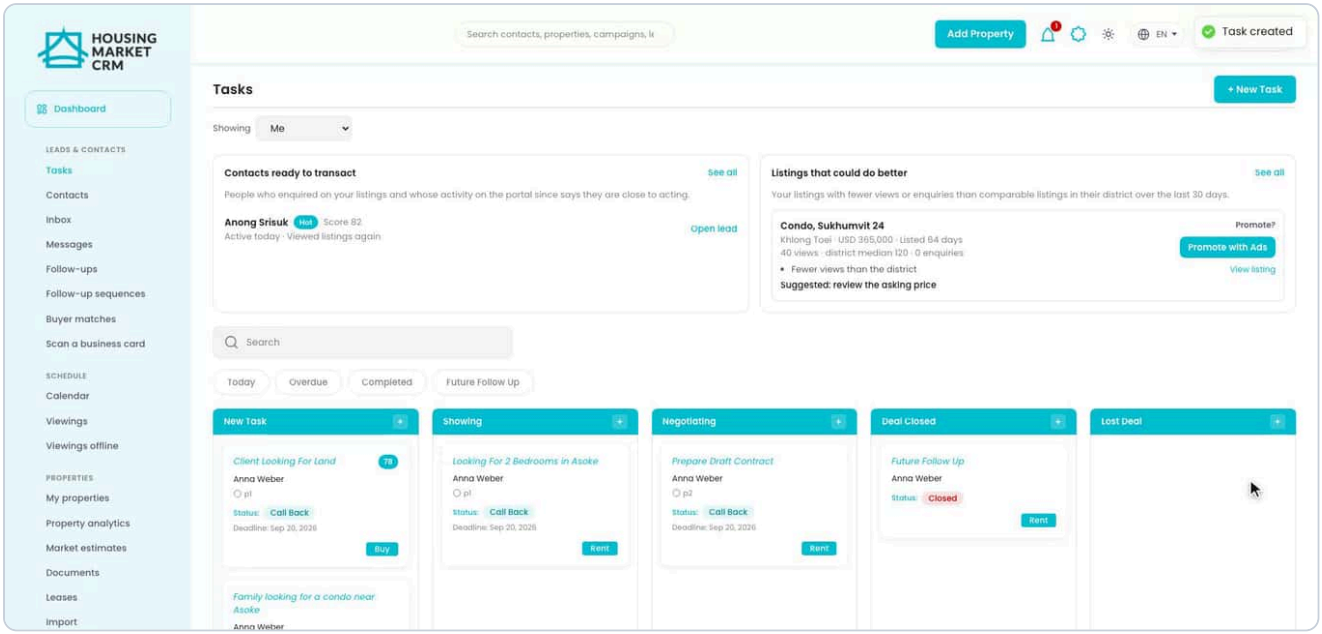


Figure 13.9 · Screen recorded 17 September 2026

10 The lead appears in **New Task** on your board.

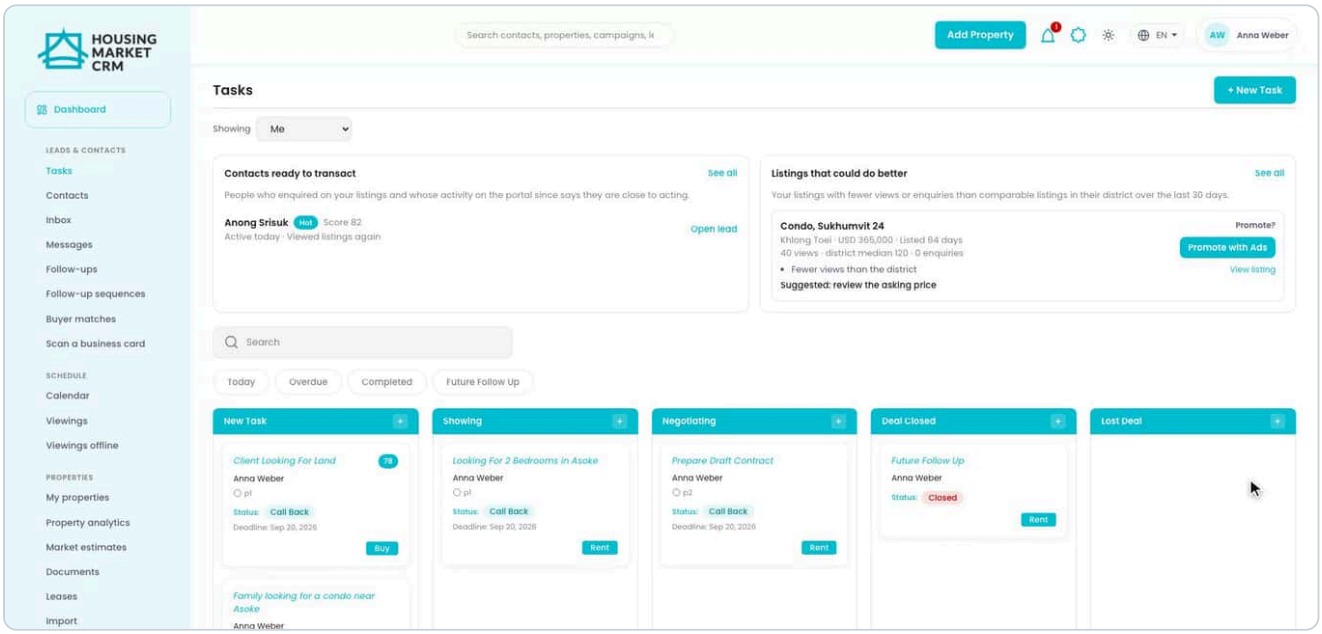


Figure 13.10 · Screen recorded 17 September 2026

GOOD TO KNOW

NOTE

Yes, on a Kanban board with five fixed columns: New Task, Showing, Negotiating, Deal Closed and Lost Deal. The columns cannot be renamed or added to.

Help Center: Can I organize leads into different stages?

RELATED HELP CENTER ARTICLES

How are leads added to the CRM?	faq.housingmarketgroup.com/faq/how-are-leads-added-to-the-crm
Can I create tasks?	faq.housingmarketgroup.com/faq/can-i-create-tasks
Can I see which property generated a lead?	faq.housingmarketgroup.com/faq/can-i-see-which-property-generated-a-lead

14 CHAPTER 14

Work with a lead

All plans | For agents | Watch the video

OVERVIEW

Open a lead from the Tasks board to change its status and category, log comments and internal notes, call or message the contact, add follow-ups, record the lead source, and close it as won or lost.

Open Tasks and choose a lead on the board. Its page holds everything about that one enquiry.

Keeping it up to date

- Status — New, Call Back, Message Back or Closed. Category — Buy, Rent or Sell.
- Comments — a running log of what happened on the lead.
- Internal note — type @ to mention a colleague. Each colleague you mention is notified; one who cannot open this lead is not, and the page tells you who.
- Lead source — where the lead came from, such as a portal enquiry, a phone call, a walk-in or a referral. For a referral, add who referred them.
- Files — documents kept with the lead.

Talking to the contact

Phone calls the contact's number from your device, and is greyed out when the contact has no number. Message opens your conversation with that person in the Inbox.

What comes next

Under Follow-ups, choose Add one to set a dated follow-up; how it notifies you is described in "Does the CRM include reminders?". Follow-ups sit above the timeline, which records what has already happened on the lead.

Closing it

Mark Complete moves the lead to Deal Closed, and Mark as Lost moves it to Lost Deal; both set its status to Closed. To follow the sale itself, see "How do I turn a lead into a deal?".

From the Help Center: **What can I do on a lead's page?**

STEP BY STEP

1 Open a lead from your **Tasks** board.

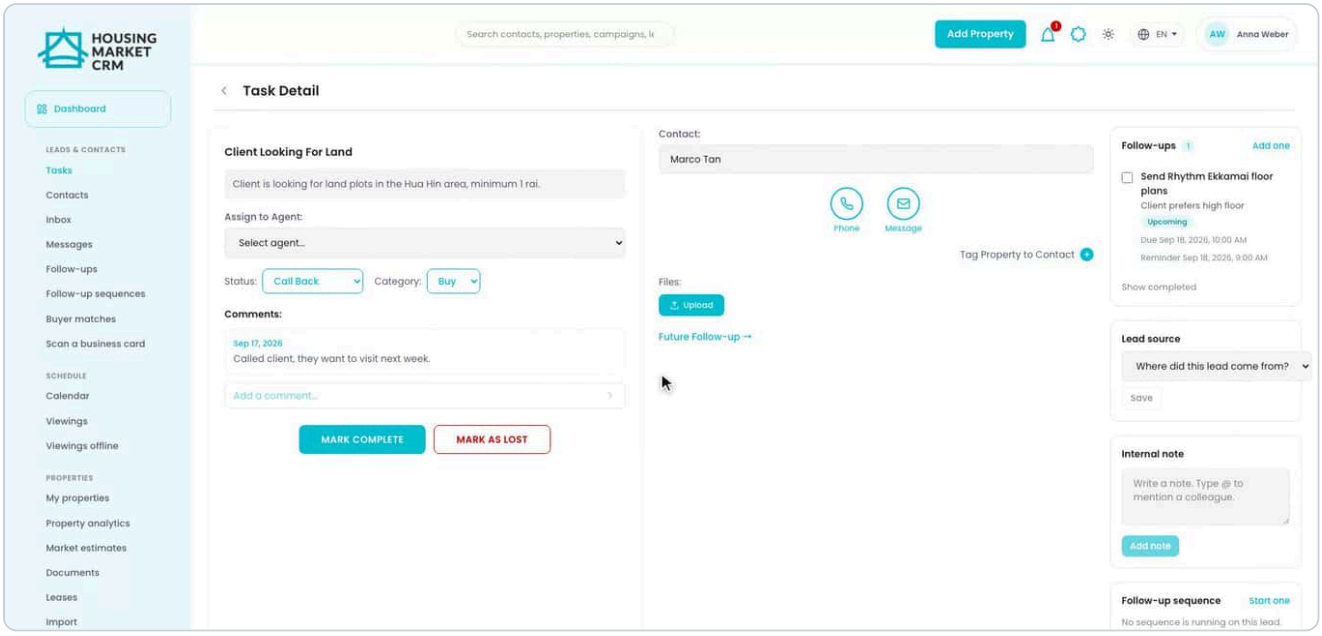


Figure 14.1 · Screen recorded 17 September 2026

2 Update the **status** as the lead moves on.

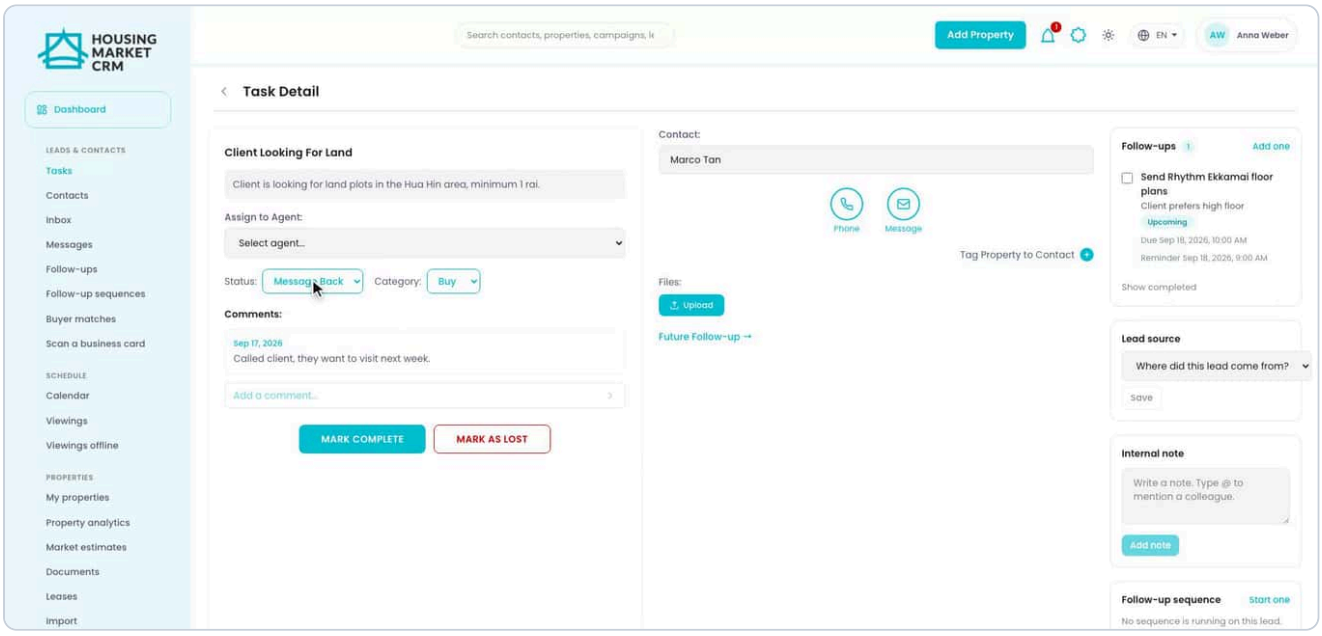


Figure 14.2 · Screen recorded 17 September 2026

3 **Category** says whether they want to buy or rent.

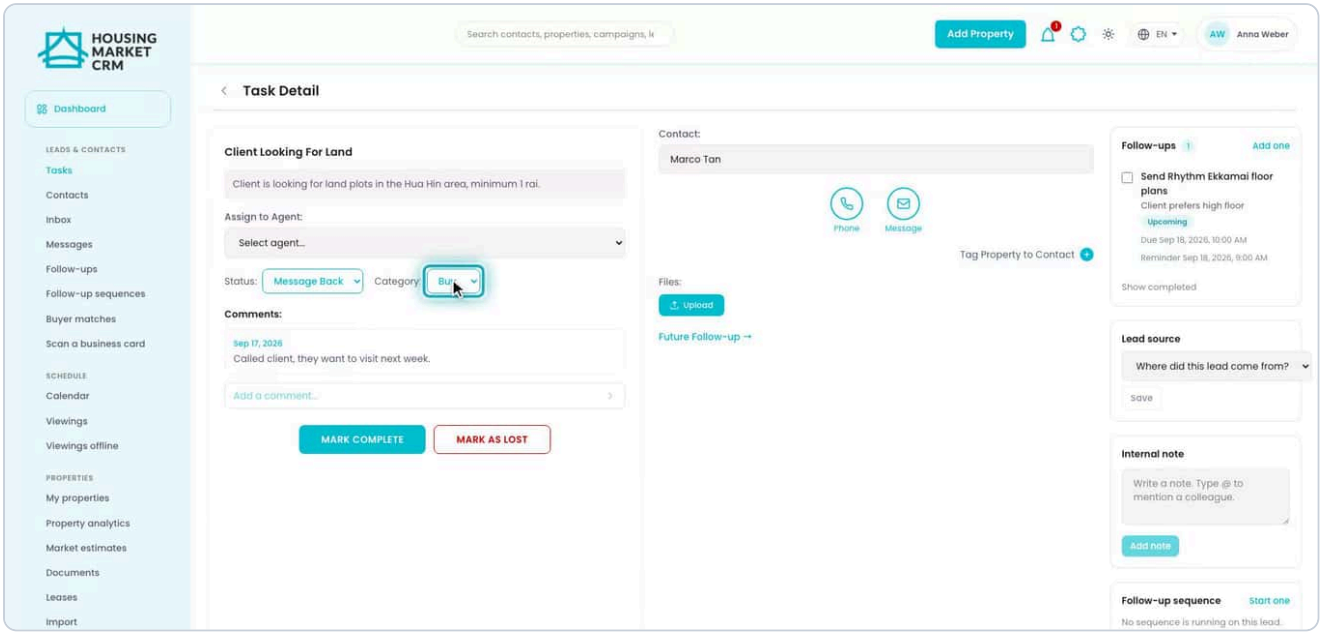


Figure 14.3 · Screen recorded 17 September 2026

4 Log what happened in **Comments**.

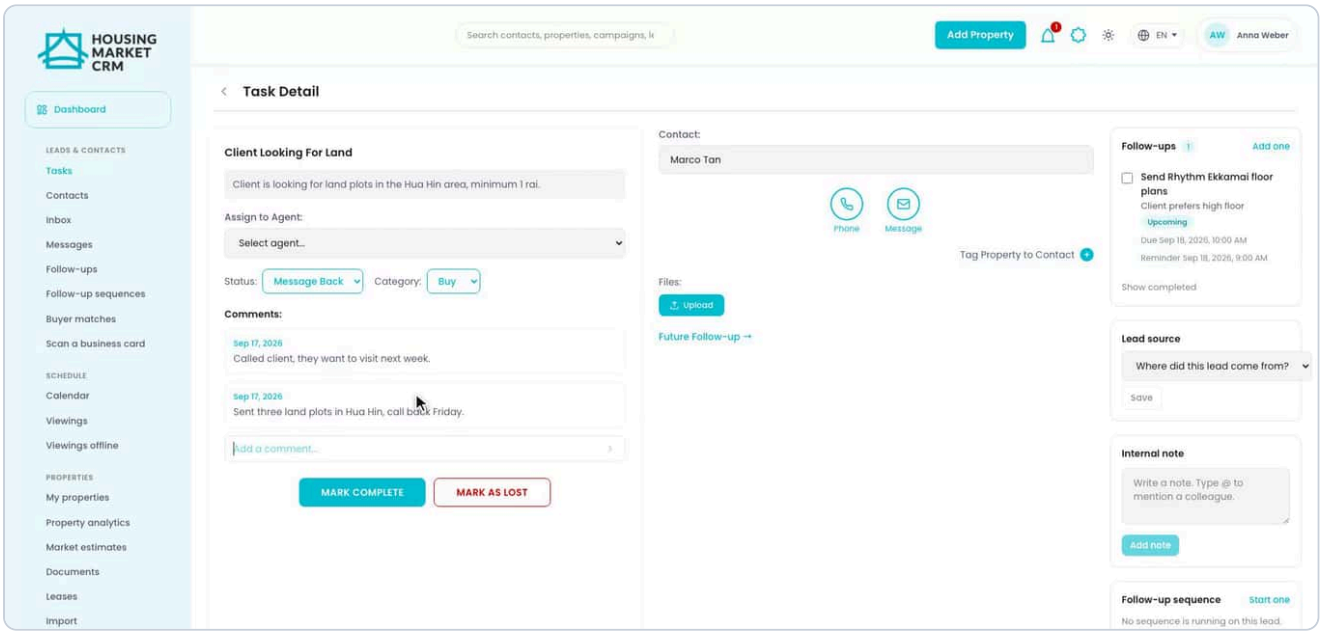


Figure 14.4 · Screen recorded 17 September 2026

5 Add an **internal note** — type @ to mention a colleague.

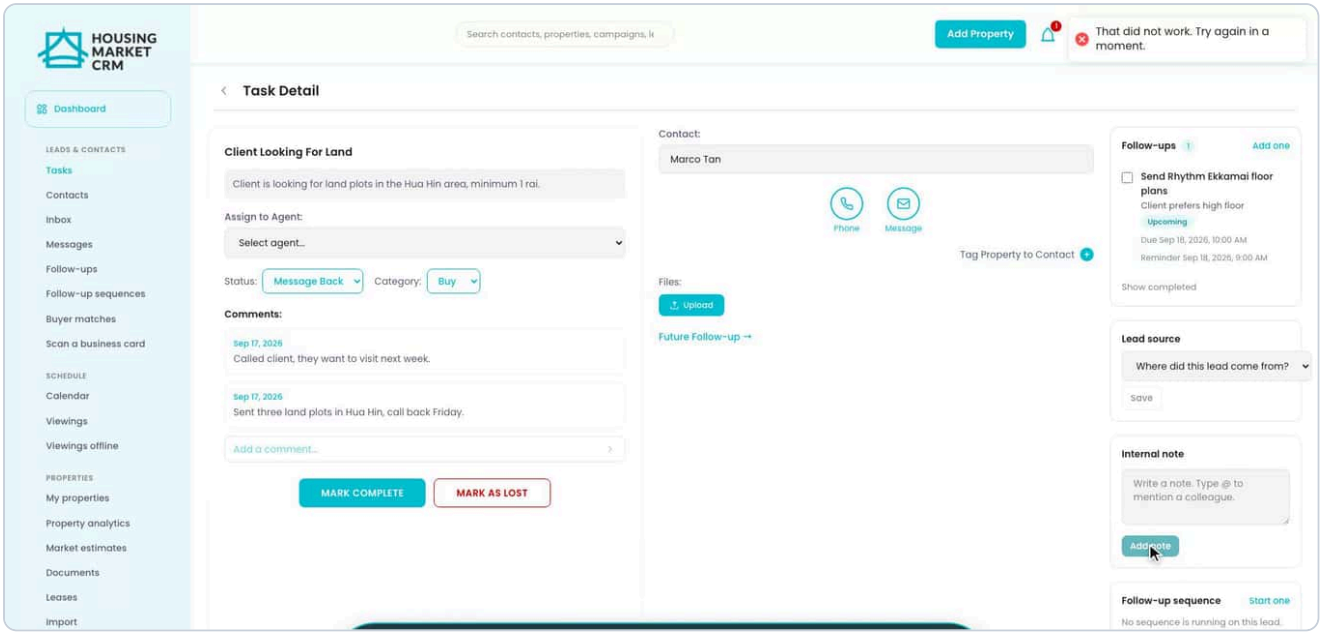


Figure 14.5 · Screen recorded 17 September 2026

6 Call or message the **contact** in one click.

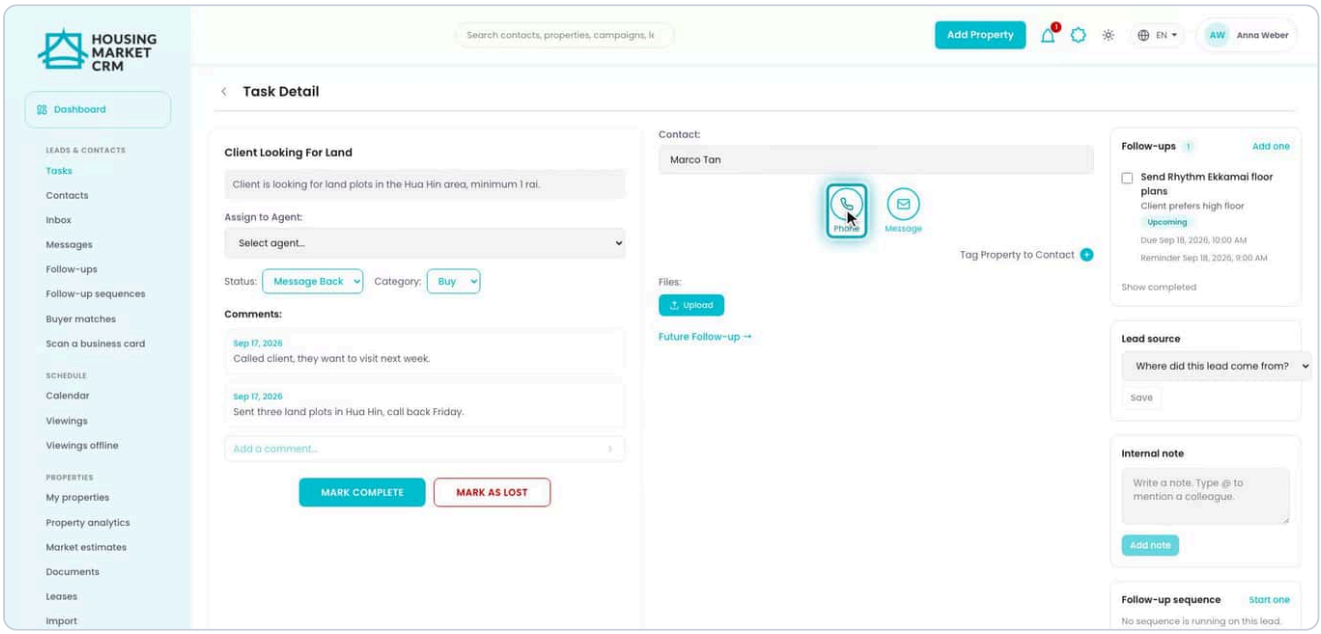


Figure 14.6 · Screen recorded 17 September 2026

7 Under **Follow-ups**, click **Add one**.

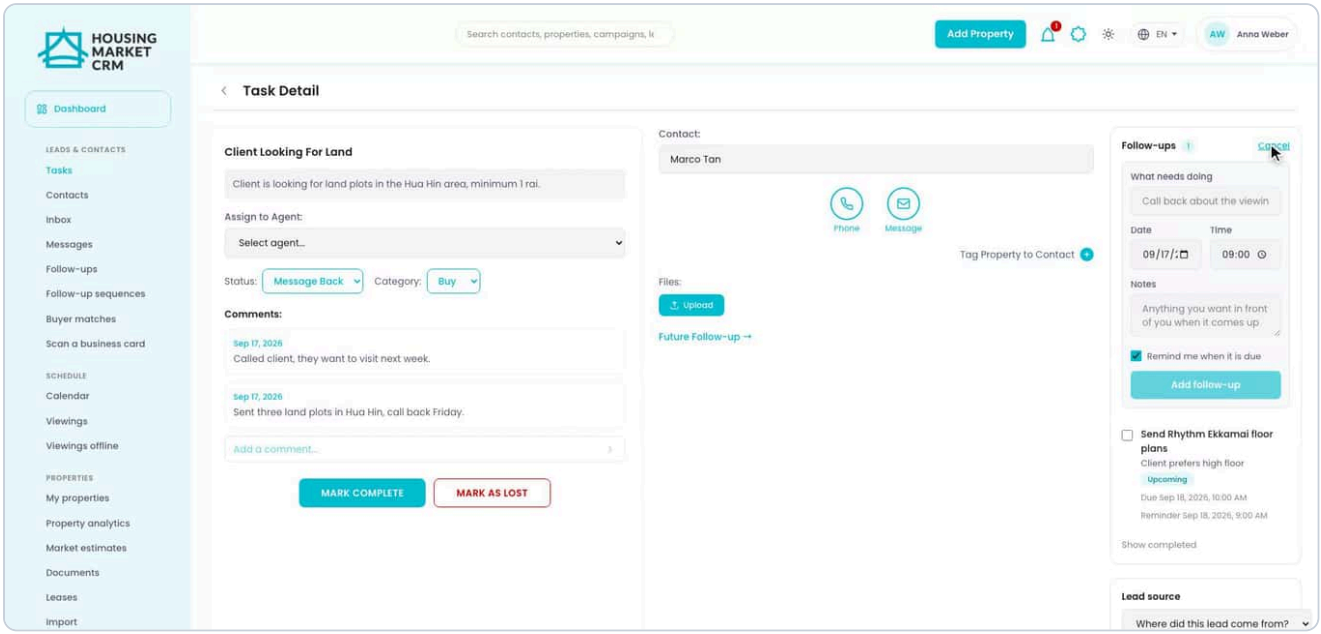


Figure 14.7 · Screen recorded 17 September 2026

8 Pick a date and what to do — you get a reminder.

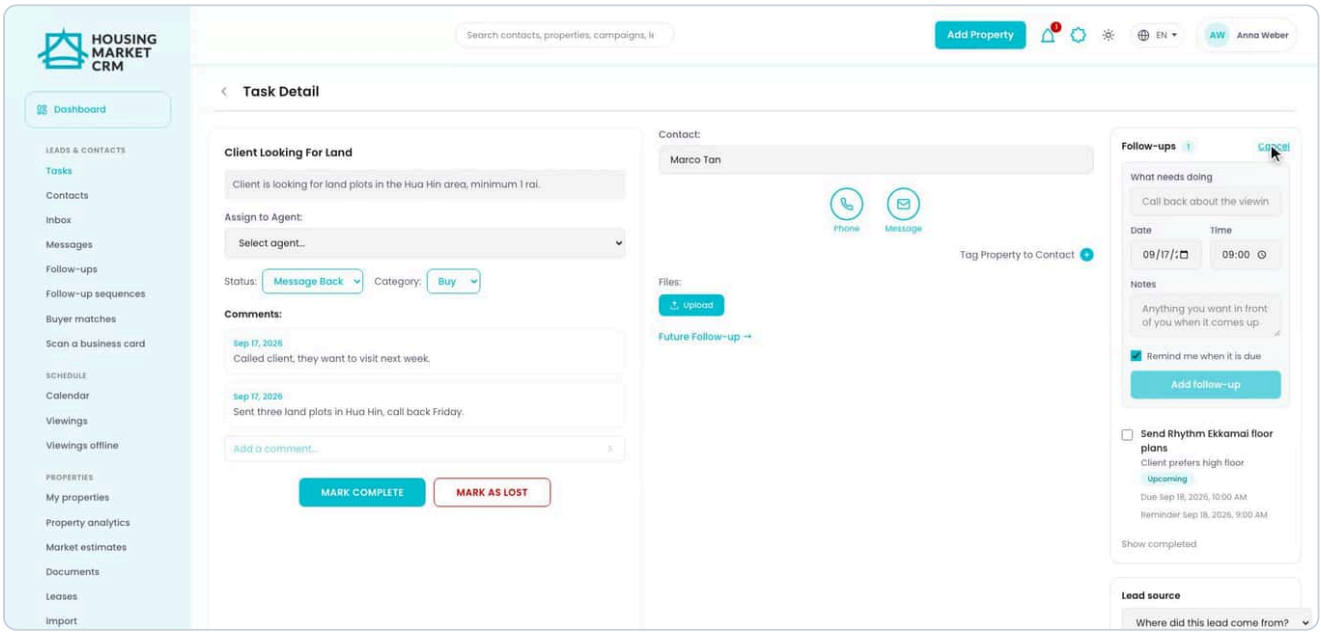


Figure 14.8 · Screen recorded 17 September 2026

9 Set the **lead source**.

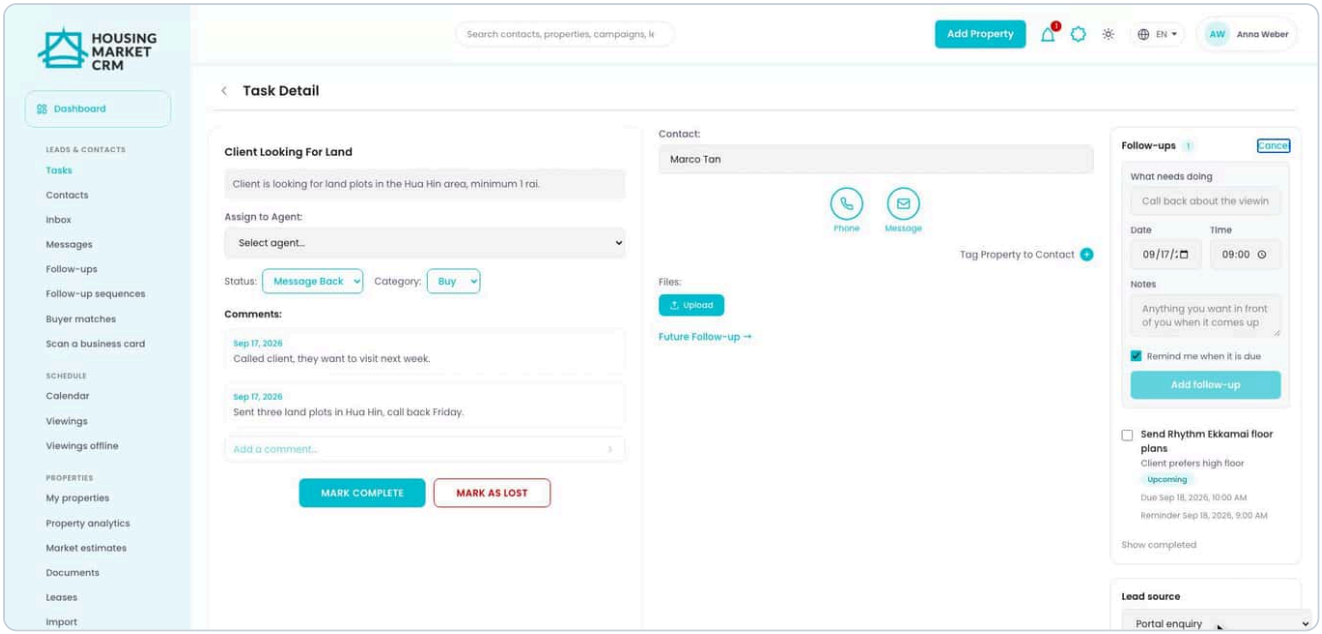


Figure 14.9 · Screen recorded 17 September 2026

10 When you are done, click **Mark Complete** — or **Mark as Lost**.

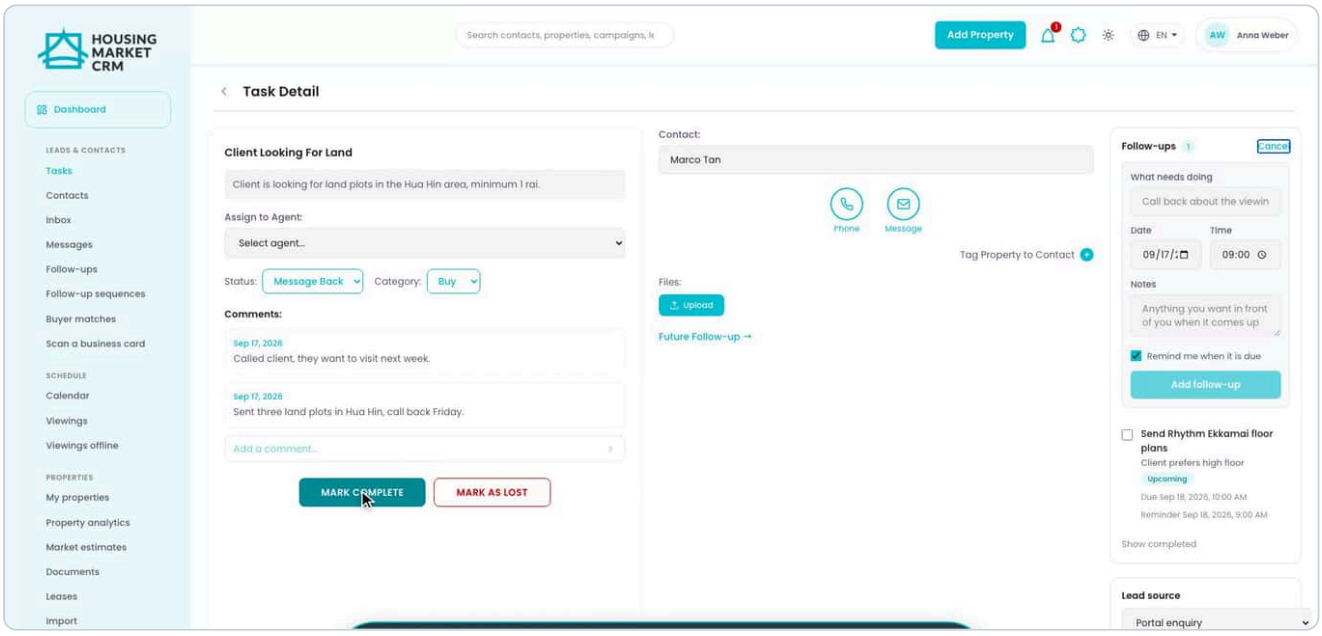


Figure 14.10 · Screen recorded 17 September 2026

GOOD TO KNOW

NOTE

You give a lead or a contact a follow-up with a due date and time, and the CRM reminds you when it falls due unless you untick that. Calls, viewings and meetings go in the calendar against the property and the lead.

Help Center: Can I create tasks?

TIP

Yes. A follow-up reminds you when it falls due, unless you untick "Remind me when it is due", and the CRM notifies you again if it is still open a day later.

Help Center: Does the CRM include reminders?

NOTE

Where the portal knows who the buyer is and they have agreed to it, a lead's record shows the listings they have been looking at. For many leads it is empty, and that is expected.

Help Center: Can I see which listings a lead has been browsing?

RELATED HELP CENTER ARTICLES

How do I turn a lead into a deal?	faq.housingmarketgroup.com/faq/how-do-i-turn-a-lead-into-a-deal
What happens when I delete a contact, a lead or a colleague?	faq.housingmarketgroup.com/faq/what-happens-when-i-delete-a-contact-a-lead-or-a-colleague

15 CHAPTER 15

Link a lead to a property

All plans | For agents | Watch the video

TODO Help Center and video disagree: the video says the + beside Tag Property to Contact links the property to the lead; the Help Center says that button only adds the listing to the contact's tagged properties, and a lead's own property is set with Interested Property or Link to a lead. Confirm on the screen, then correct the video caption (the Help Center is the source).

OVERVIEW

Pick it as the Interested Property when you create the lead, or choose Link to a lead on a property card in My properties. Enquiries from the portal arrive already linked to their listing.

A lead that names its property shows it on the lead's page, with its photo and a link to the listing. Enquiries from your portal listings arrive linked to the listing they were about. For a lead you add yourself, there are two ways:

- When you create the lead: in the Interested Property field of + New Task, search the portal listings by address, area or city and pick one.
- From the property: in My properties, choose Link to a lead on one of your CRM properties, then search your leads by title and pick one. The lead's timeline records the link.

If a lead has both, its page shows the CRM property.

Tag Property to Contact is different

On a lead's page, the + beside Tag Property to Contact adds a listing to the contact's tagged properties, not to the lead. It does not change which property the lead is about.

From the Help Center: **How do I link a lead to a property?**

STEP BY STEP

1 Open the **lead** you want to link.

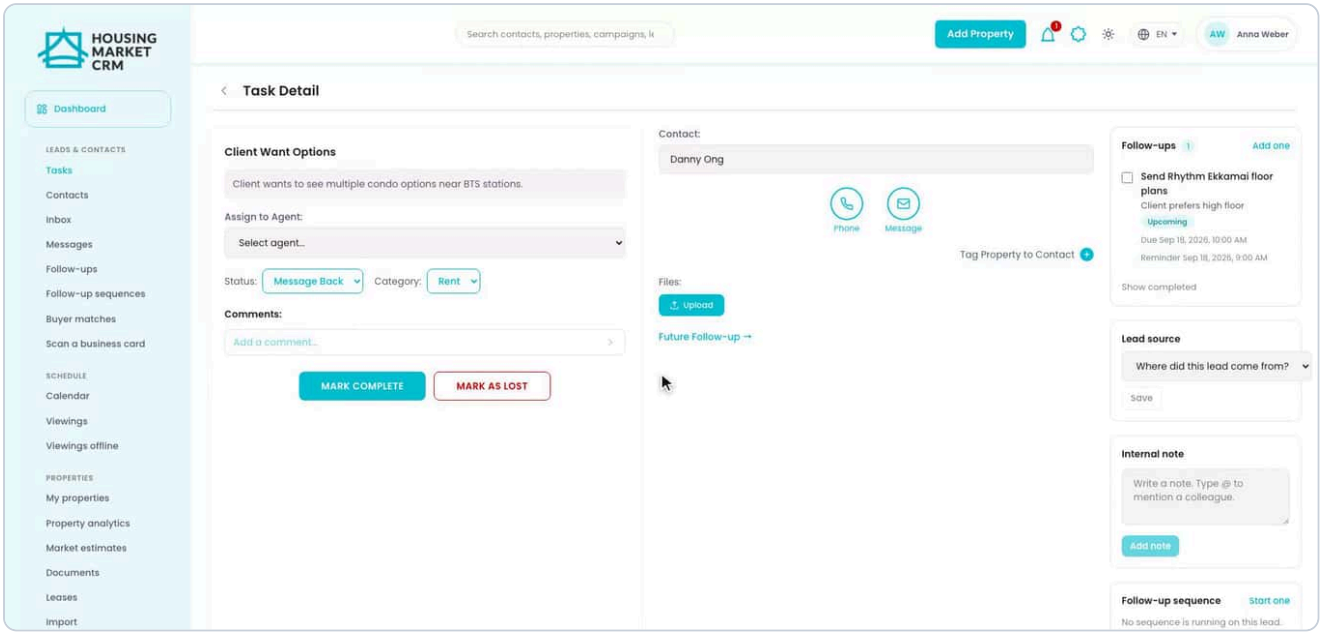


Figure 15.1 · Screen recorded 17 September 2026

2 Click **+** next to **Tag Property to Contact**.

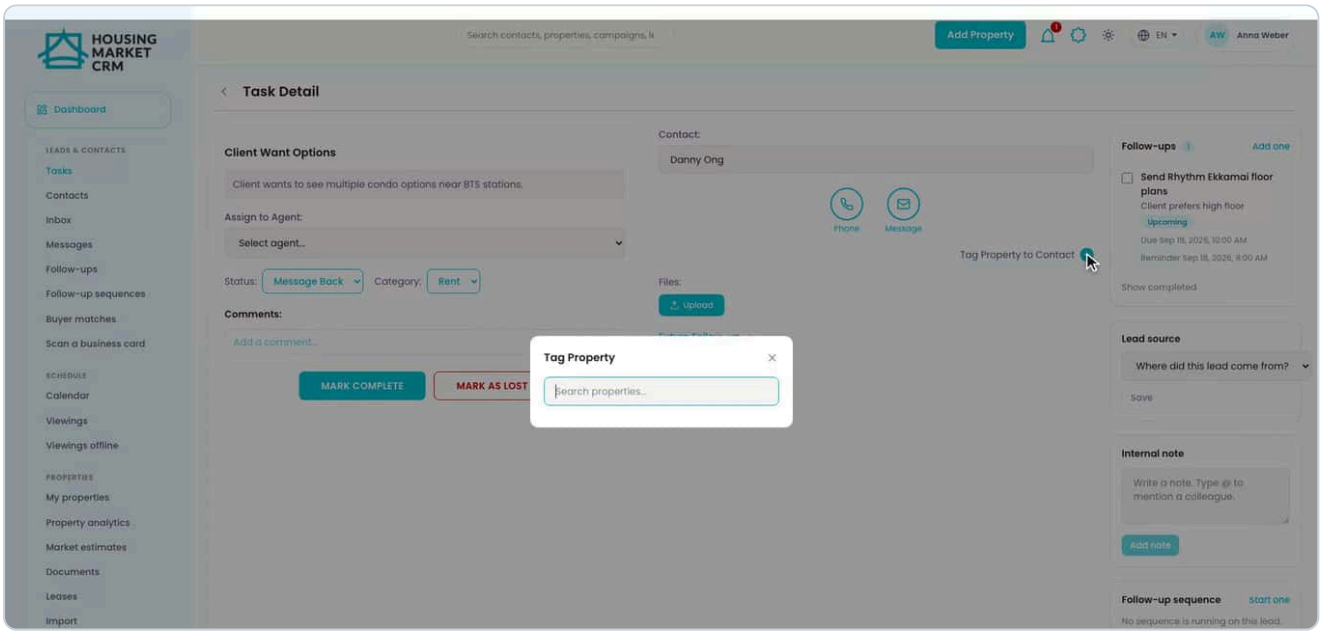


Figure 15.2 · Screen recorded 17 September 2026

3 Search your **properties** and pick the listing.

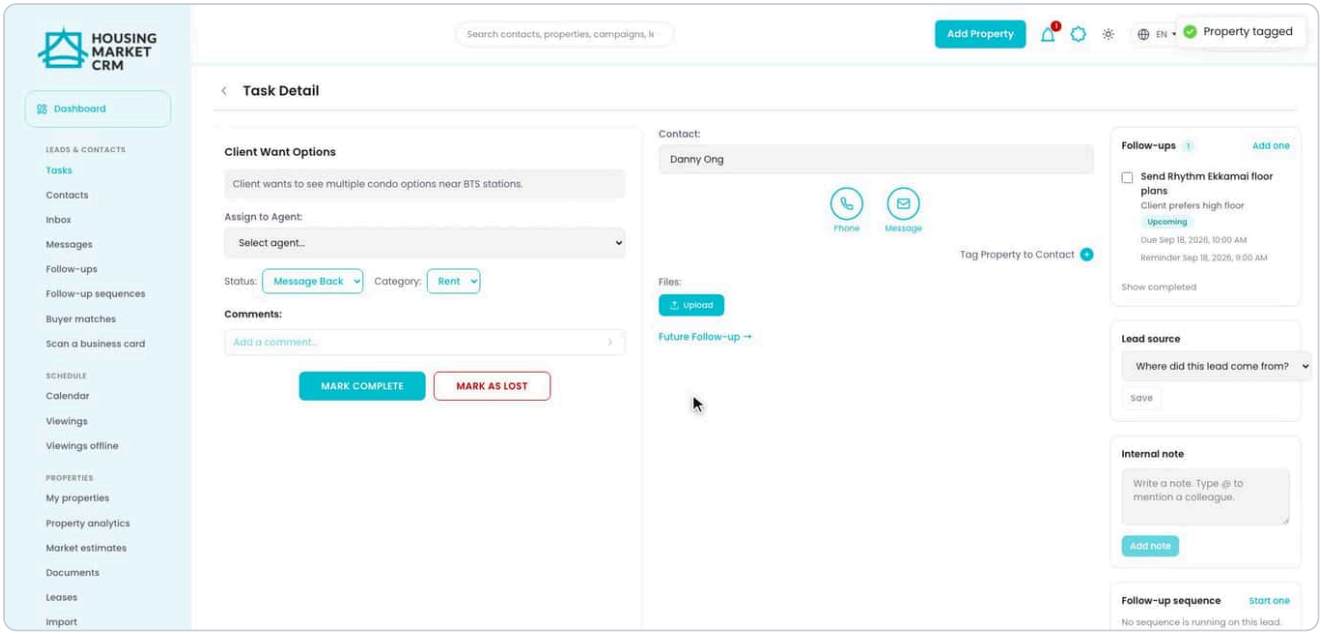


Figure 15.3 · Screen recorded 17 September 2026

4 The property is now **linked** to this lead.

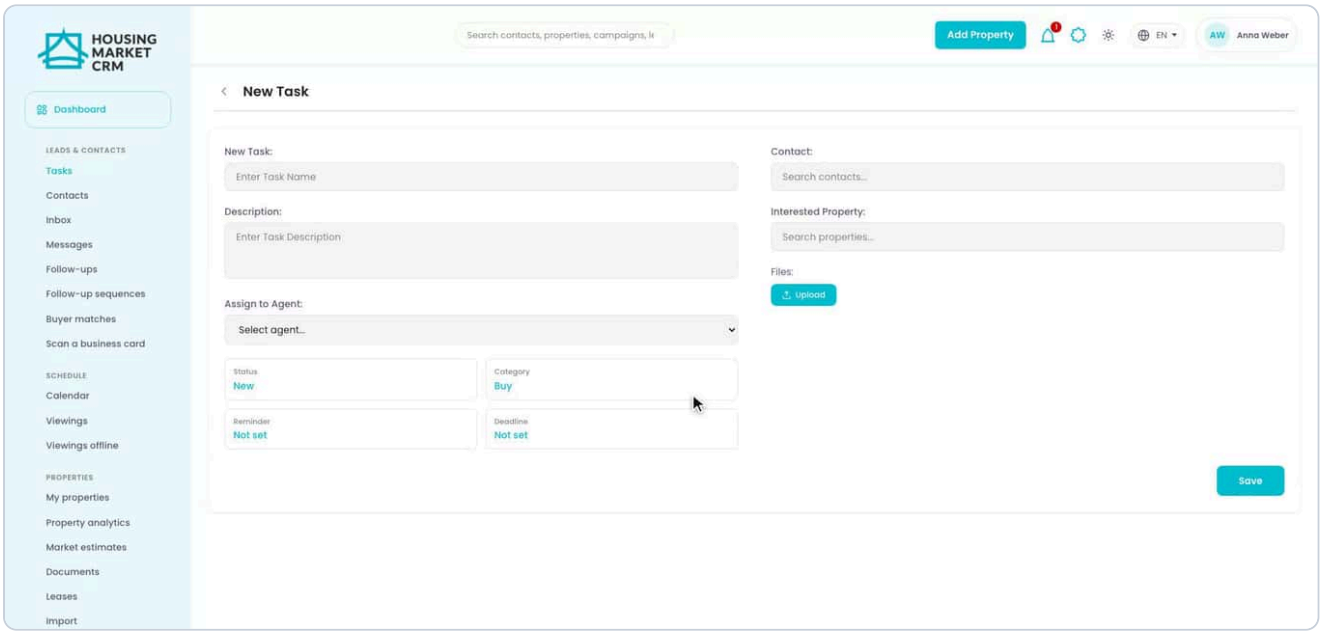


Figure 15.4 · Screen recorded 17 September 2026

5 When you create a lead, use **Interested Property**.

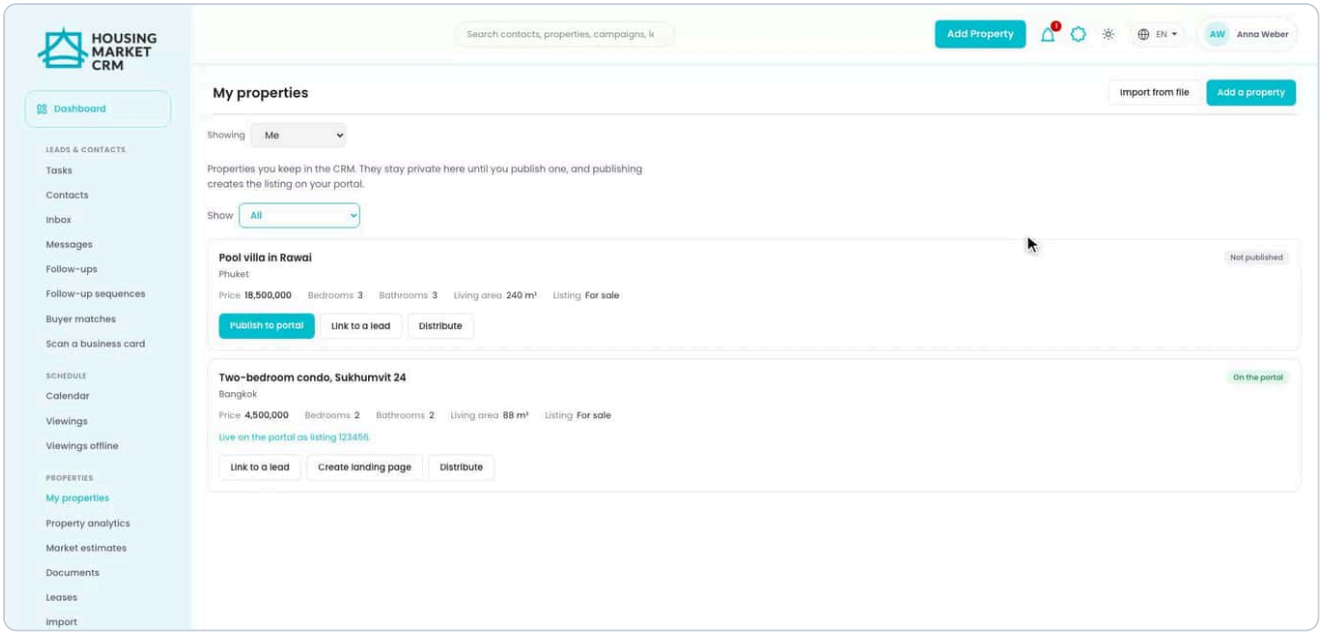


Figure 15.5 · Screen recorded 17 September 2026

6 On a property card, use **Link to a lead**.

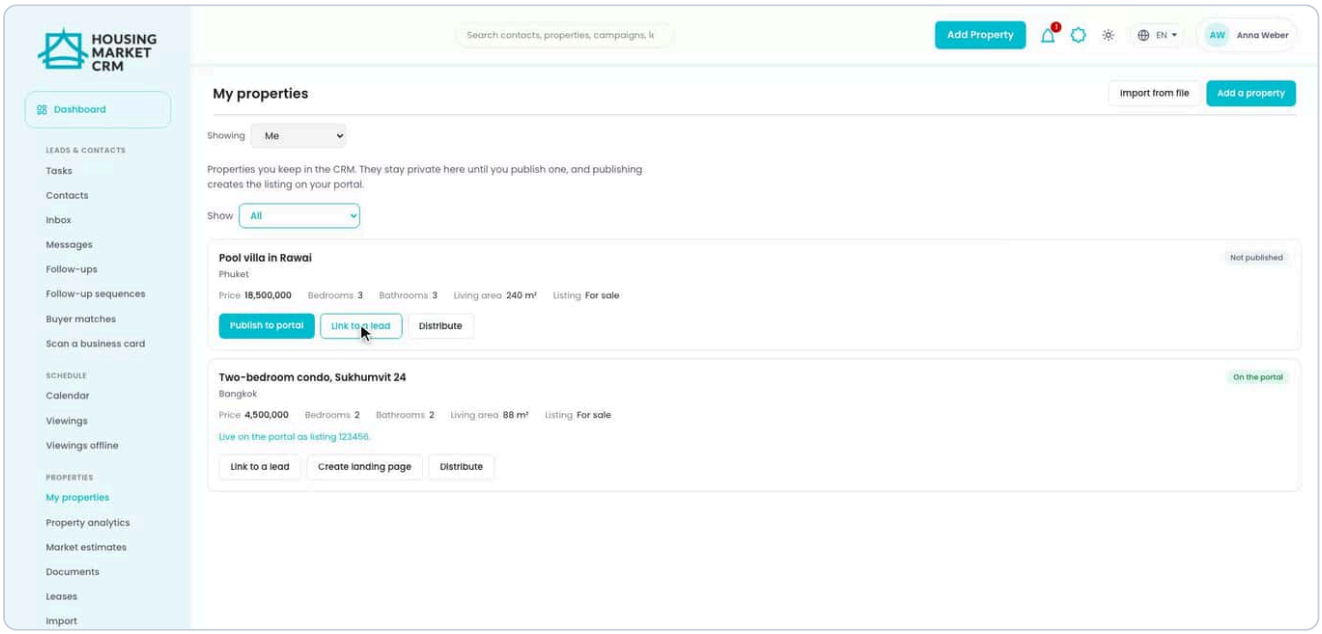


Figure 15.6 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

Can I see which property generated a lead?	faq.housingmarketgroup.com/faq/can-i-see-which-property-generated-a-lead
Can I manage enquiries from multiple listings?	faq.housingmarketgroup.com/faq/can-i-manage-enquiries-from-multiple-listings

16 CHAPTER 16

Reply to a lead

All plans | For agents | Watch the video

TODO The Help Center says the enquiries a Housing Market Cloud website receives "are not in the inbox yet"; the video (2026-09-17) says "Every conversation is here: portal, website, ads and email", and the Inbox screen's own subtitle lists website forms. Check whether Cloud enquiries reach the inbox and correct whichever is wrong.

OVERVIEW

One inbox on every plan with one thread per person, gathering portal enquiries, Housing Market Ads leads and the email you send from the CRM.

The inbox lists the people you are talking to, newest first, and opens one thread for each of them, whichever way they reached you:

- Enquiries on your portal listings, and your replies
- Leads from Housing Market Ads
- Email you have sent from the CRM

Reply from the thread: on the portal, in the enquiry's own conversation, or by a one-to-one email. Search finds a person or a message, and read and archived are kept per person using the inbox, so a colleague's reading does not mark a thread read for you.

Your own Gmail or Microsoft 365 mailbox, WhatsApp messages, and the enquiries a Housing Market Cloud website receives are not in the inbox yet; all three are being built.

From the Help Center: **What is the inbox in the CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

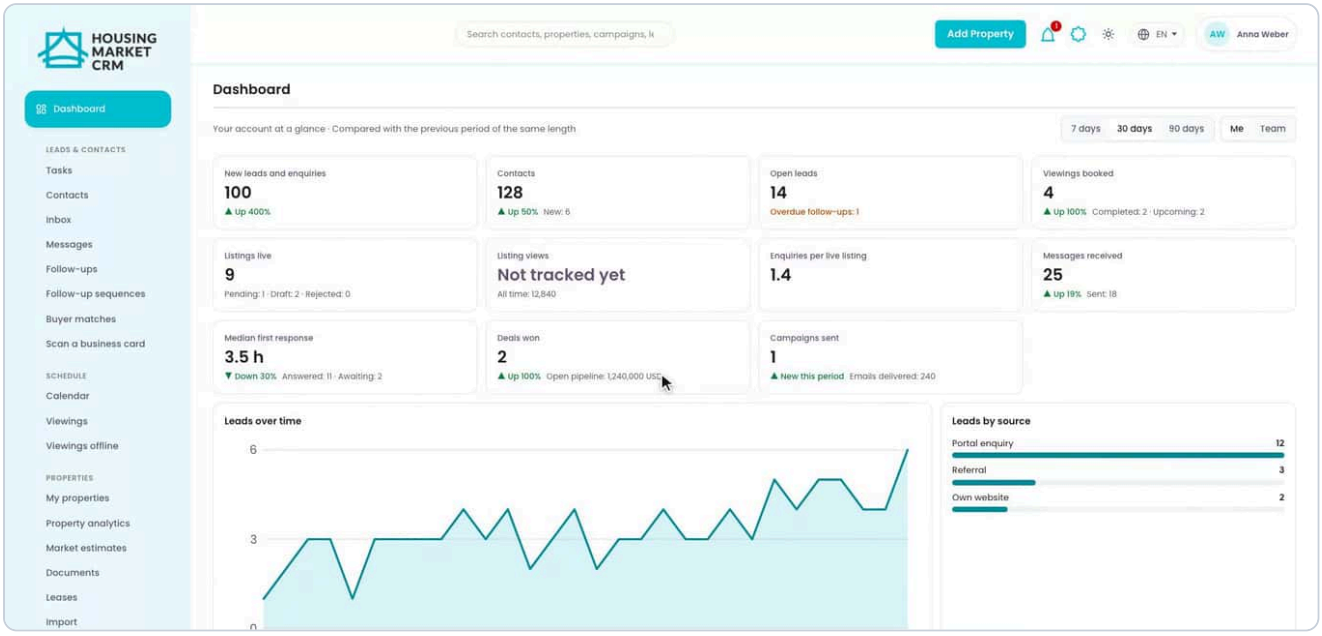


Figure 16.1 · Screen recorded 17 September 2026

2 Click **Inbox** in the left menu.

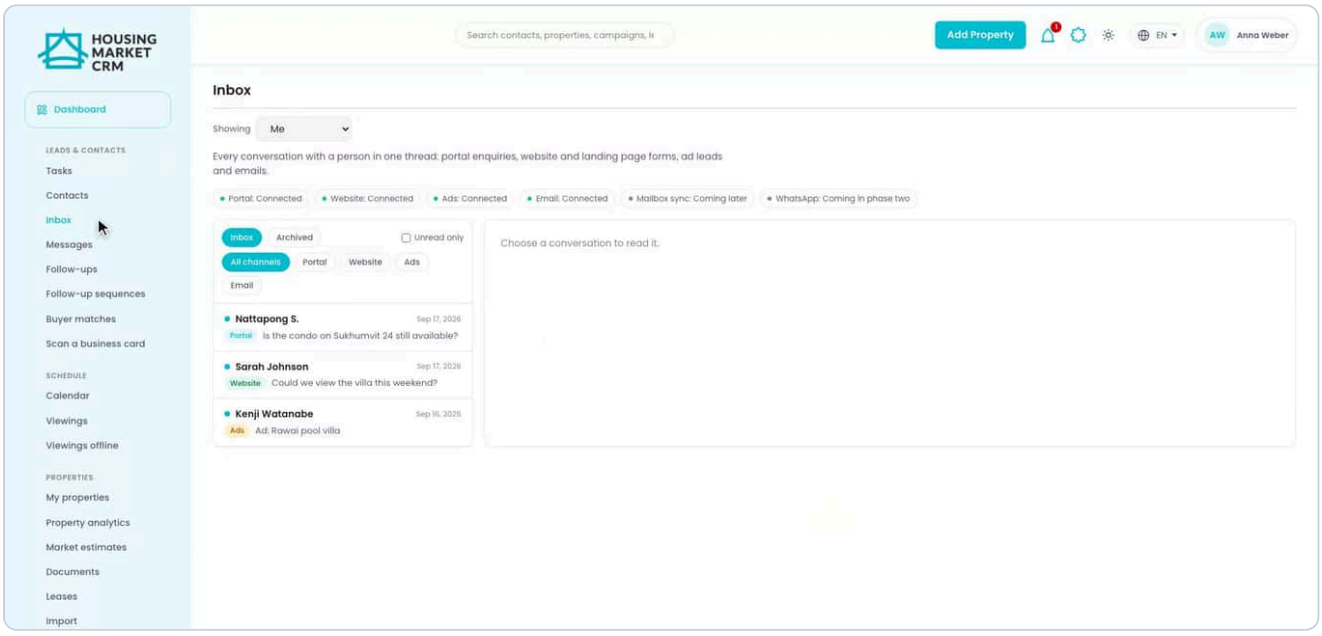


Figure 16.2 · Screen recorded 17 September 2026

3 Every conversation is here: portal, website, ads and email.

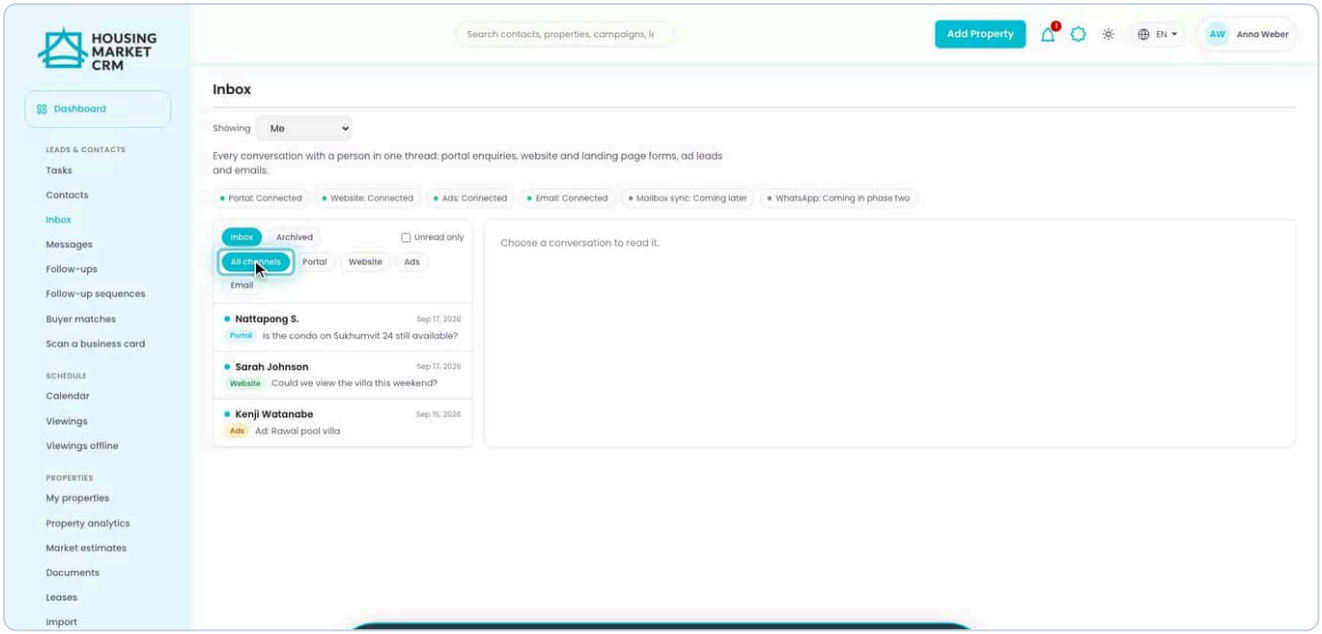


Figure 16.3 · Screen recorded 17 September 2026

4 Filter by channel, e.g. **Portal**.

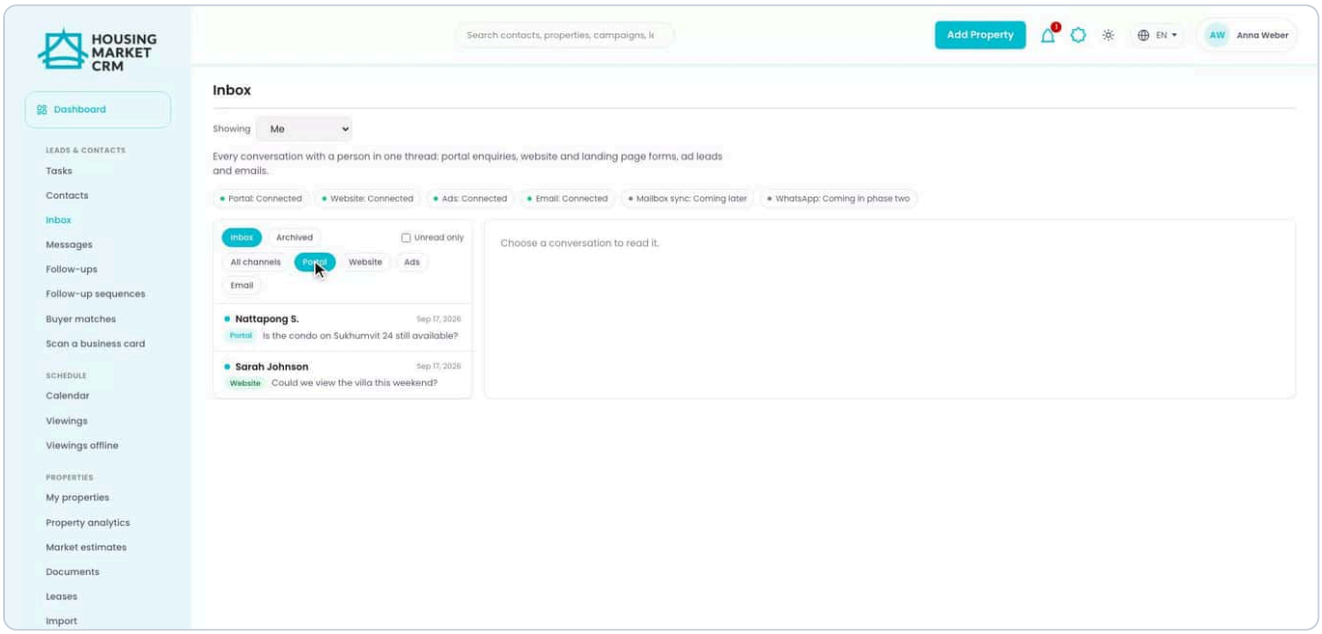


Figure 16.4 · Screen recorded 17 September 2026

5 Open the **enquiry**.

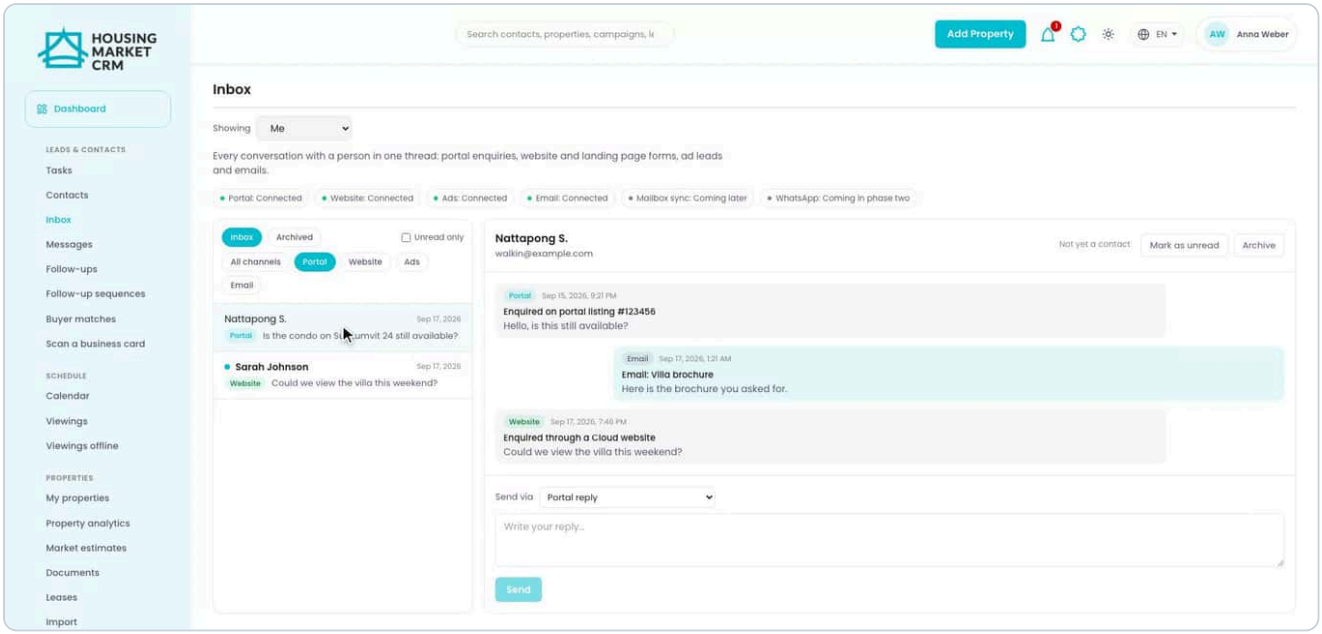


Figure 16.5 · Screen recorded 17 September 2026

6 Choose how to send — **Portal reply** or **Email**.

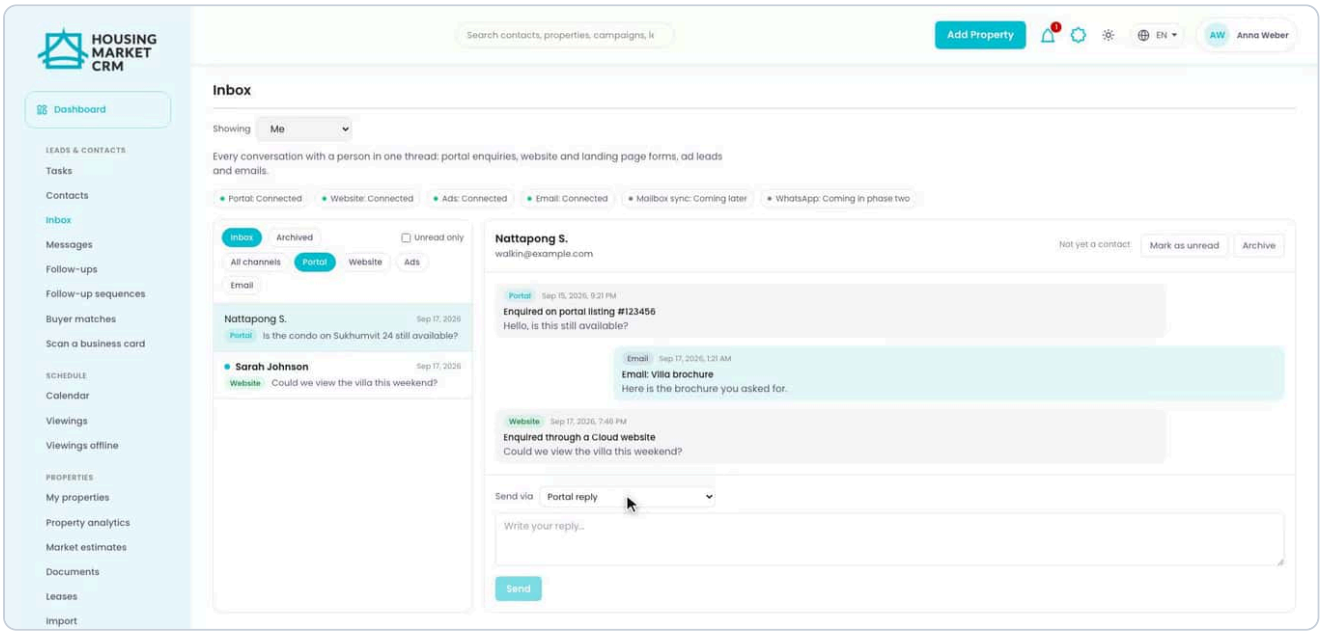


Figure 16.6 · Screen recorded 17 September 2026

7 Write your **reply**.

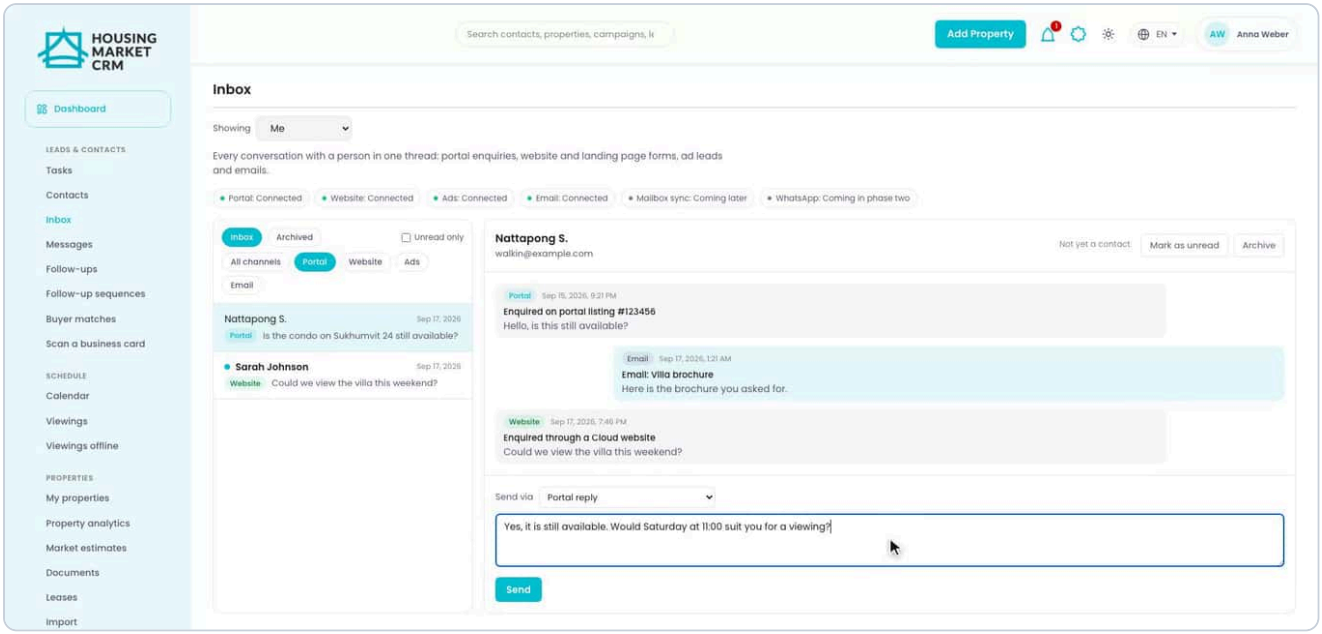


Figure 16.7 · Screen recorded 17 September 2026

8 Click **Send**.

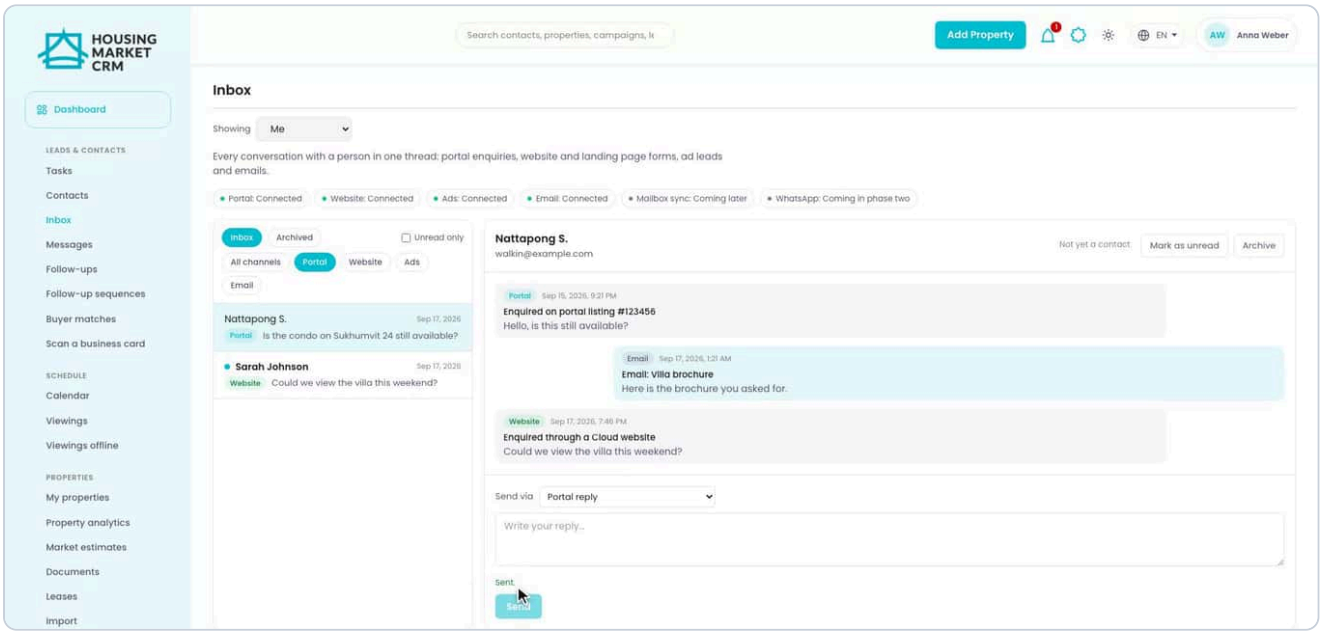


Figure 16.8 · Screen recorded 17 September 2026

9 The reply is added to the thread and reaches the buyer.

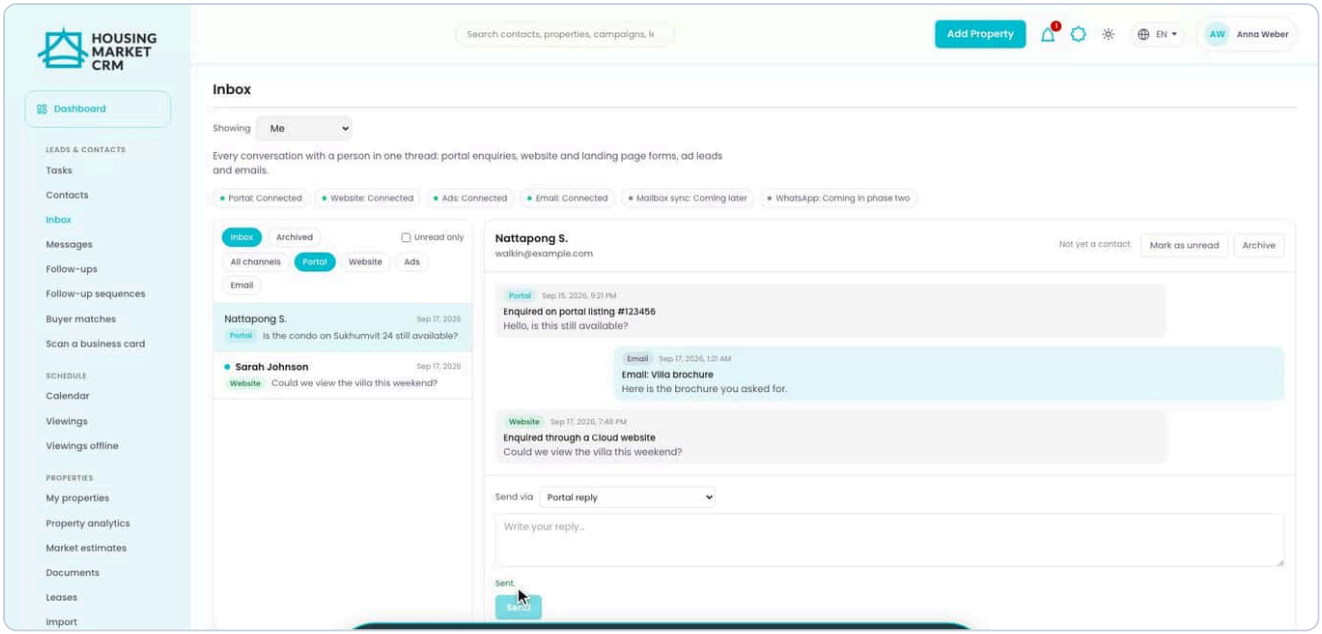


Figure 16.9 · Screen recorded 17 September 2026

GOOD TO KNOW

NOTE

Yes. The inbox keeps one thread per person, and every contact has a timeline of everything that happened with them, on every plan.

Help Center: Can I track communication with buyers?

RELATED HELP CENTER ARTICLES

How do WhatsApp templates work?	faq.housingmarketgroup.com/faq/how-do-whatsapp-templates-work

17 CHAPTER 17

See interested buyers

All plans | For agents | Watch the video

TODO The video opens Buyer matches, which the Help Center describes as reverse matching on Pro, but the video catalogue lists this task for all plans (and reverse-matching for Pro). Confirm the plan.

TODO The last caption says buyers hear about a home "before anyone else", which the Help Center does not say. Reword the video caption.

OVERVIEW

On Pro, when one of your listings goes live the CRM finds the contacts whose requirements it suits, tells you, and lets you send it to them in one step once you confirm they asked for matching properties.

The usual search starts from a buyer and looks for listings that suit them. Reverse matching works the other way round: it starts from a listing and finds the buyers on your list who would want it. It is part of Pro.

- Record what a buyer is looking for on their lead — the market, sale or rent, property type, bedrooms, bathrooms, city and budget.
- When one of your listings is published on the portal, the CRM checks it against those requirements and notifies you that it has matches.
- Open Buyer matches in the left menu. Each of your live listings with matches shows how many of your contacts match it; open one to see who matched and on what.
- Tick “These buyers asked me to send them properties that match what they are looking for.”, then select Send to the matching contacts.

The confirmation is needed on every send. The box starts unticked each time and is never remembered, the send button stays unavailable until it is ticked, and your confirmation is recorded with the send.

Buyers from the Germany, Spain and Cyprus portals

A buyer whose enquiry came from the Germany, Spain or Cyprus portal is included only once you have recorded their opt-in. When the listing itself is on one of those portals, the same applies to every buyer. Until then the buyer shows as Needs a recorded opt-in and is left out of the send.

- Open the buyer's lead and find Matching listings by email.
- Tick “This buyer agreed to receive matching listings by email”.
- Under How did they agree?, say how — for example “asked by email on 3 October” — and select Record opt-in.

The date, your note and who recorded it are kept on the contact. Remove opt-in takes it away again.

Who is left out, and how buyers stop these emails

A buyer receives at most 3 of these emails from your account in any 7 days. A buyer who has already had 3 shows as Weekly limit reached and is skipped that time.

A matched buyer who cannot be emailed — there is no contact on the lead, the contact has no email address, they unsubscribed from your emails, their address is suppressed after a bounce, a complaint or an unsubscribe, they need a recorded opt-in, or they reached the weekly limit — is named on the screen with the reason, rather than the send quietly reaching fewer people than it showed you.

The email goes out under your name via the portal, and replies come straight to your own email address. It has no unsubscribe link in the text. Instead, the buyer's email app shows its own one-click unsubscribe option, and the footer tells the buyer to use it or to reply to the email. An unsubscribe stops emails to that address from every agent, not only from you.

Buyer matches is in the menu on every plan. On Free it explains what the feature does and offers Pro instead of a list.

A listing is treated as live when the portal has approved it, whether you added it on the portal or published it from the CRM.

From the Help Center: **How does reverse matching work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

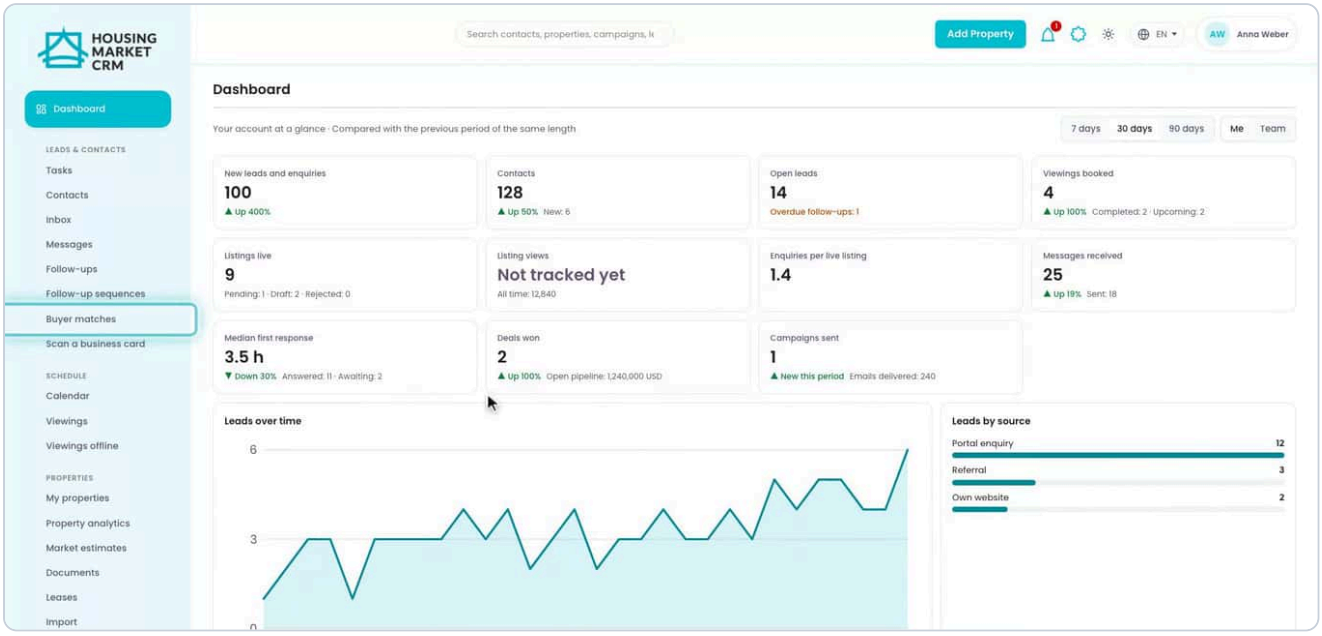


Figure 17.1 · Screen recorded 17 September 2026

2 Click **Buyer matches** in the left menu.

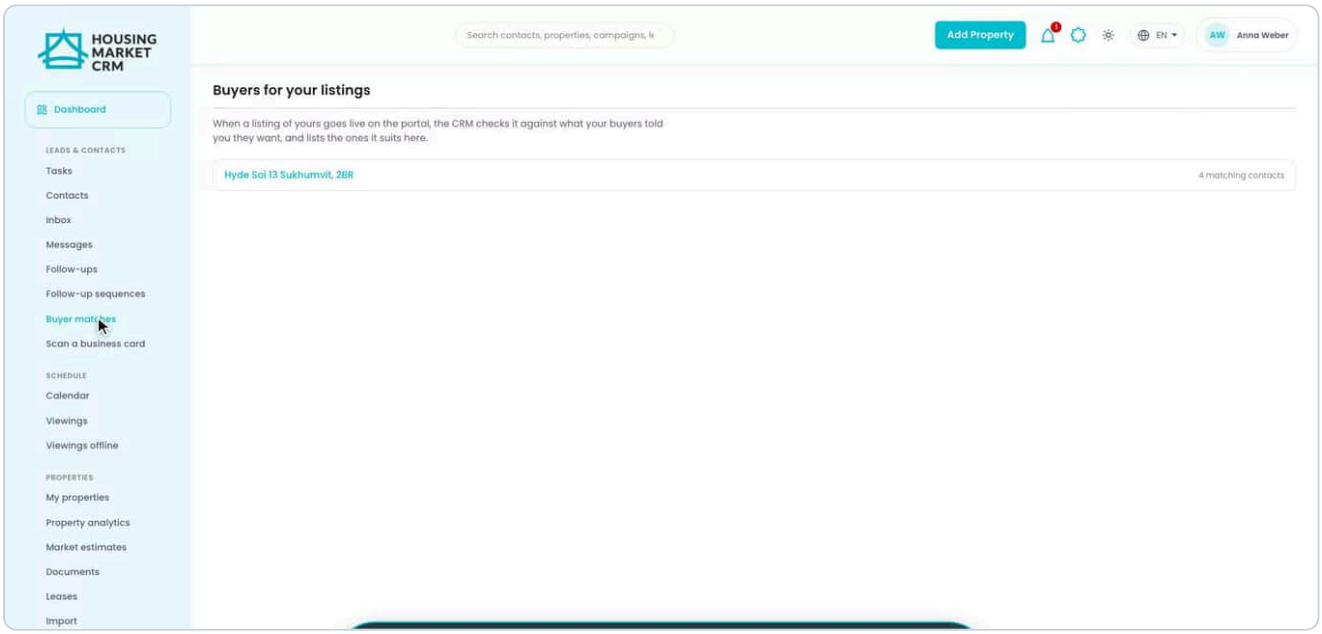


Figure 17.2 · Screen recorded 17 September 2026

3 Each live listing shows how many of your contacts **match** it.

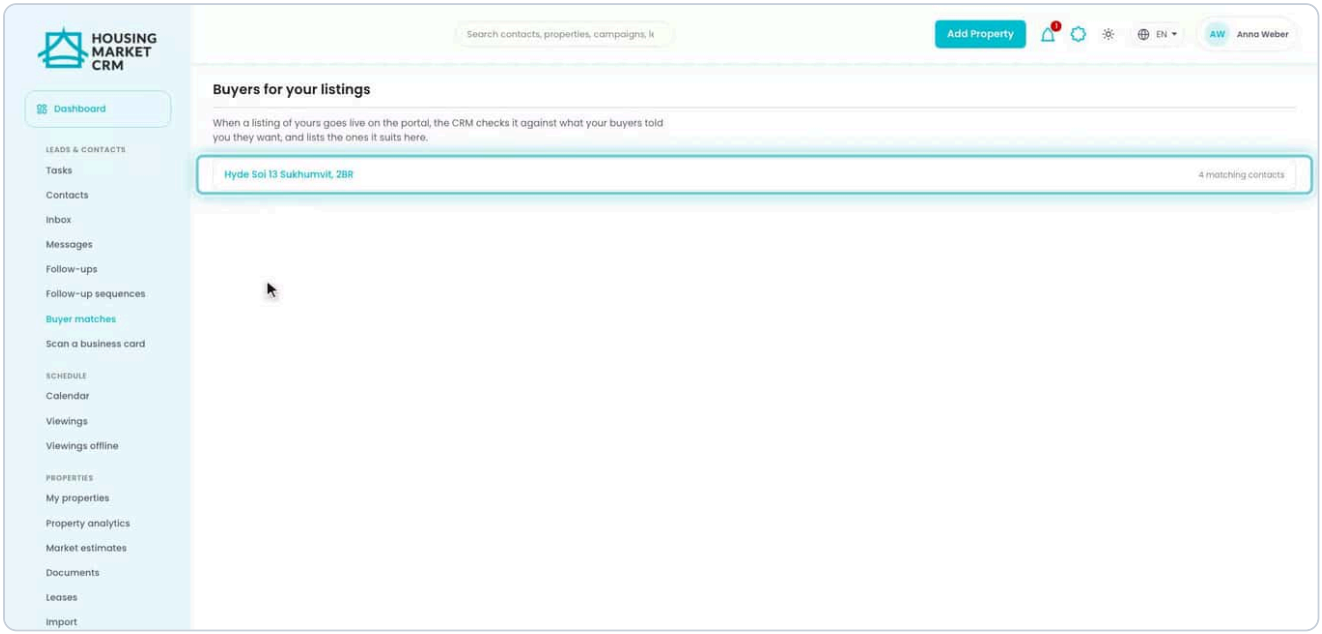


Figure 17.3 · Screen recorded 17 September 2026

4 Open a listing to see its **matching buyers**.

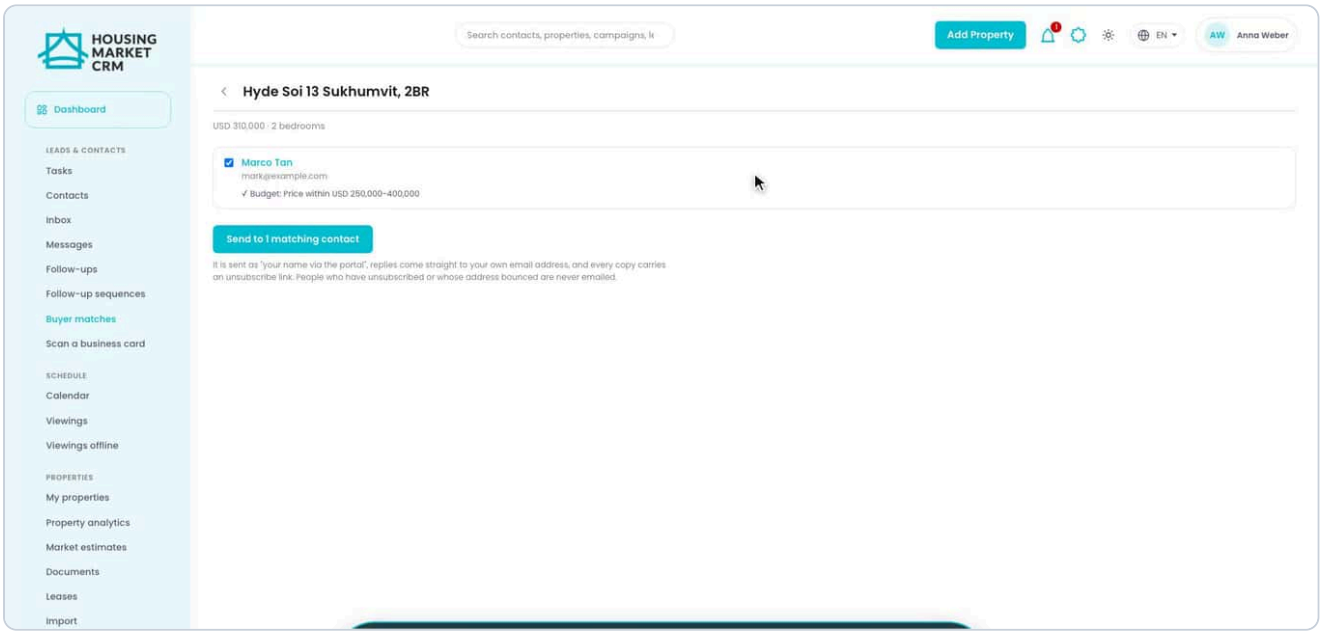


Figure 17.4 · Screen recorded 17 September 2026

5 Matches come from the **buyer requirements** on your leads.

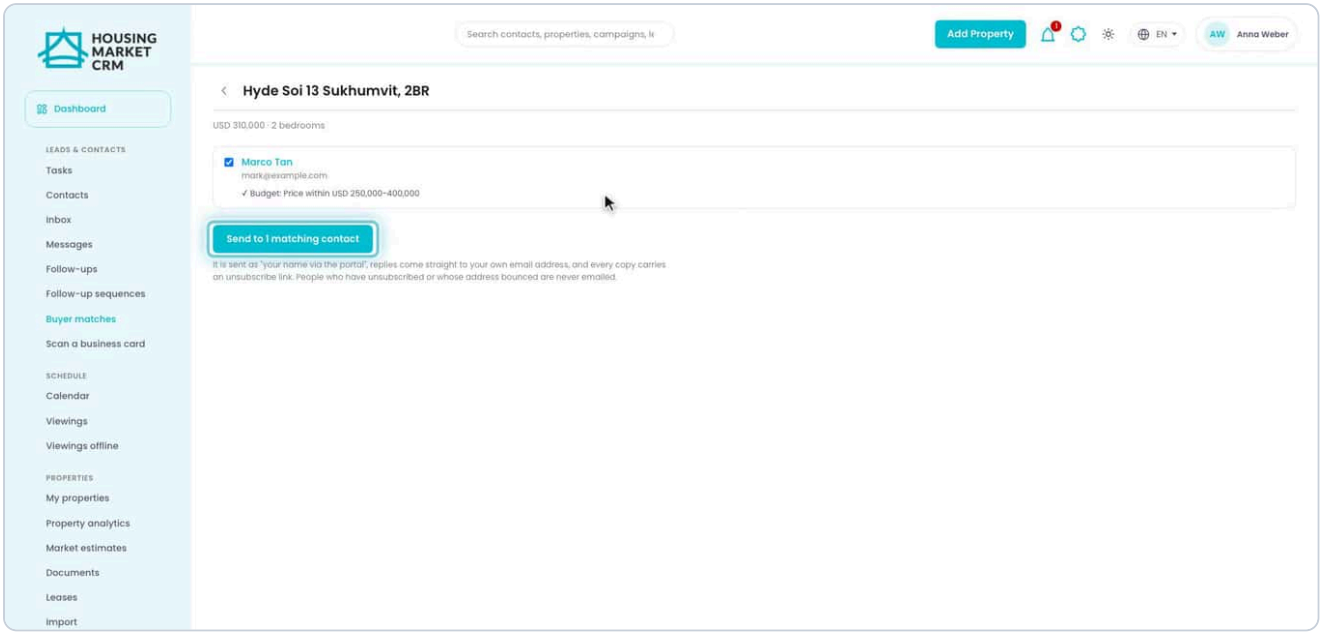


Figure 17.5 · Screen recorded 17 September 2026

6 Click **Send to** to send them the listing.

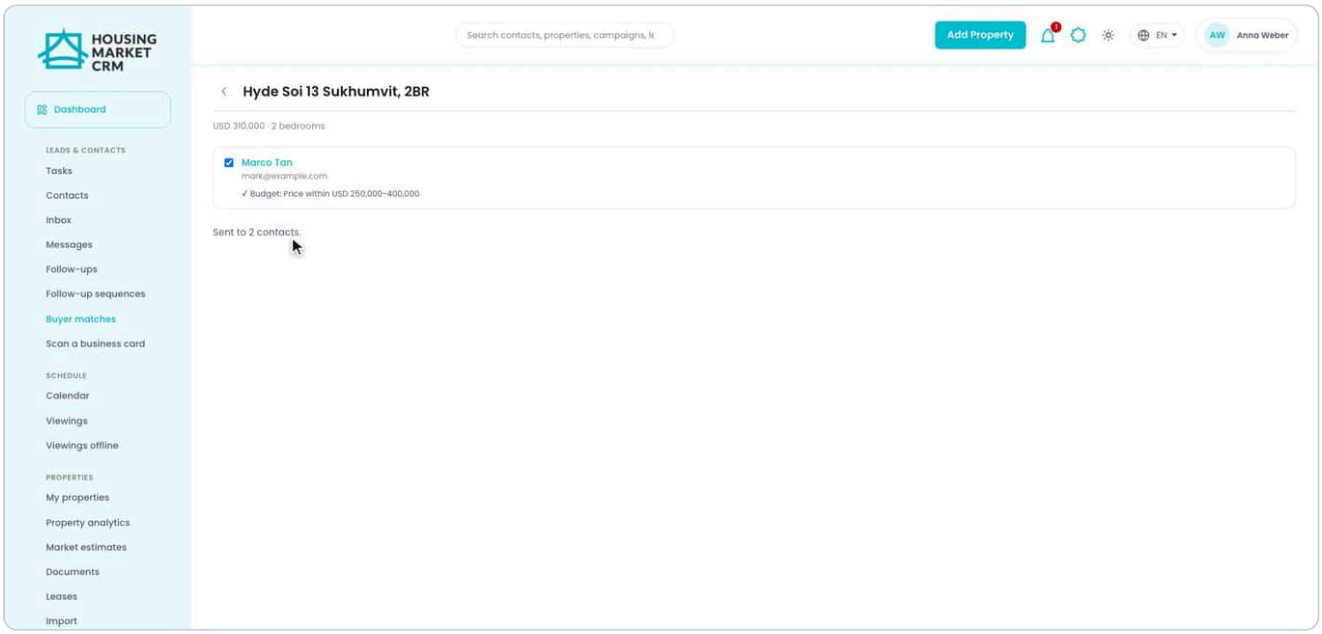


Figure 17.6 · Screen recorded 17 September 2026

7 Your buyers hear about the home **before anyone else**.

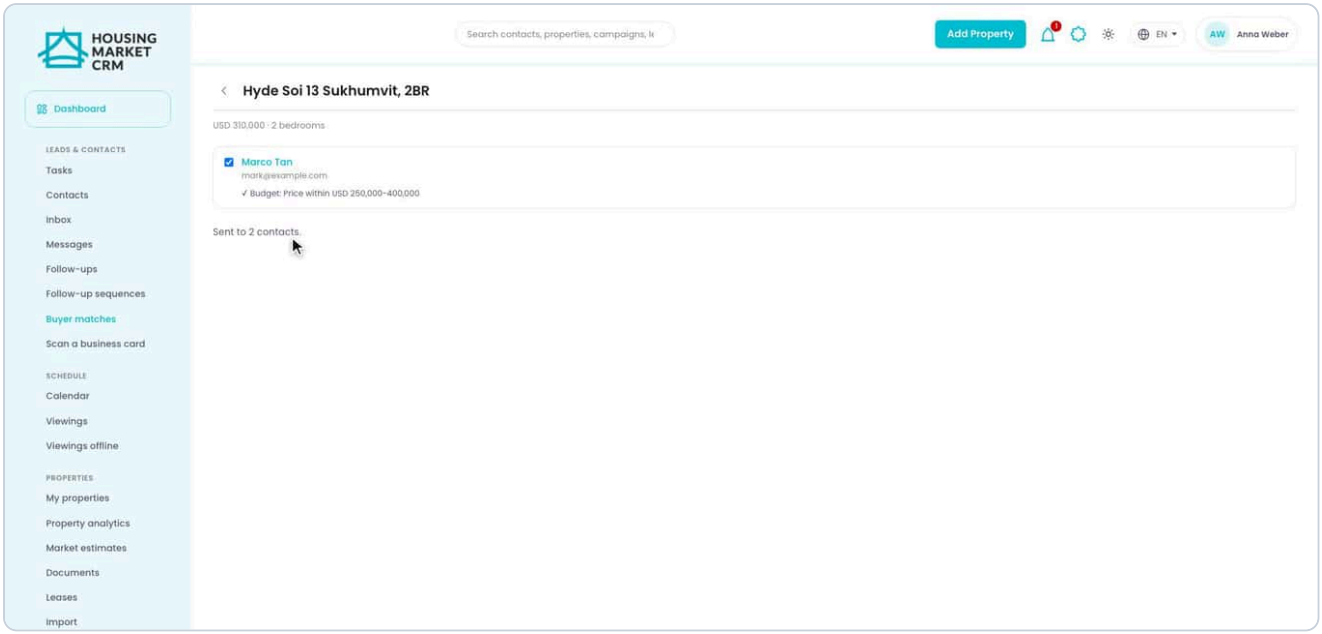


Figure 17.7 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

Can I see which listings a lead has been browsing?	faq.housingmarketgroup.com/faq/can-i-see-which-listings-a-lead-has-been-browsing

18 CHAPTER 18

Lead scoring

Pro and Business | For agents | Watch the video

OVERVIEW

On Pro, every lead on the board carries a score, and opening it shows the breakdown: which signals raised it, which held it down, and which could not be measured.

Lead scoring puts a score on every card on your lead board and ranks the board by it, so the buyers most likely to move are the ones you see first. It is part of Pro.

The score is built from what the lead and you have actually done, and every one of those signals is shown when you open the breakdown:

- How quickly the lead was answered
- How engaged the buyer has been with your messages
- How recently anything happened on the lead
- Which stage of the pipeline the lead has reached
- How the buyer has behaved on the portal, where that is known

A signal that cannot be measured is left out rather than counted against the lead, and the breakdown says how much of the picture was available. A score built on most of the signals is marked as such, so a high number from one signal is never presented as a high number from all of them.

The weights are stated judgements about residential agency rather than a trained model, which is exactly why the breakdown is there: you can disagree with a specific reason rather than with a number. On the free plan the board works as before, and the score shows as a locked Pro feature.

From the Help Center: **How does lead scoring work?**

STEP BY STEP

1 Open **Tasks**, your lead board.

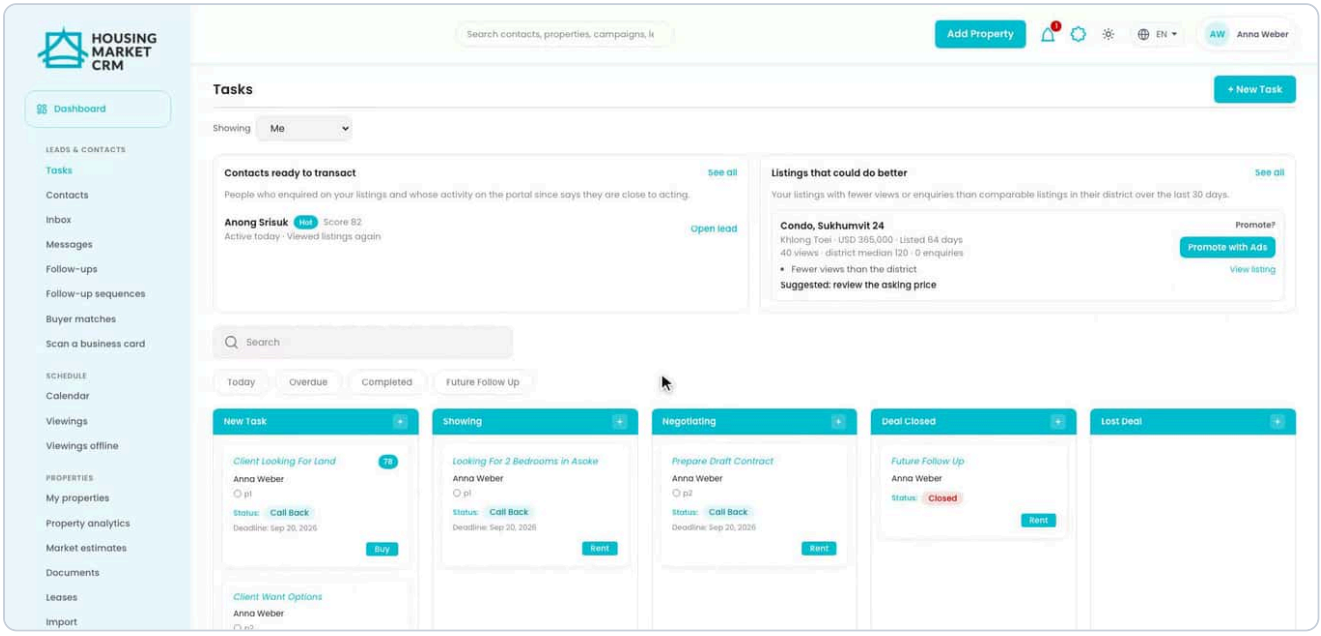


Figure 18.1 · Screen recorded 17 September 2026

2 Each lead shows a **score** from 0 to 100.

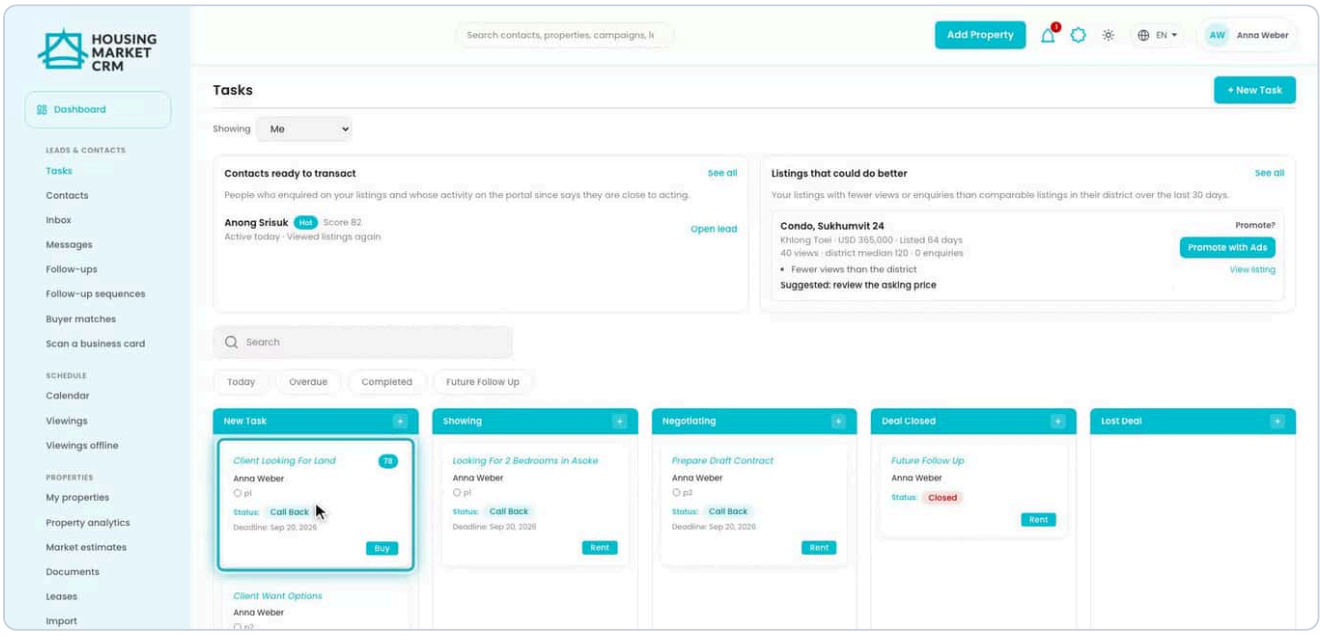


Figure 18.2 · Screen recorded 17 September 2026

3 Click the score to see the **breakdown**.

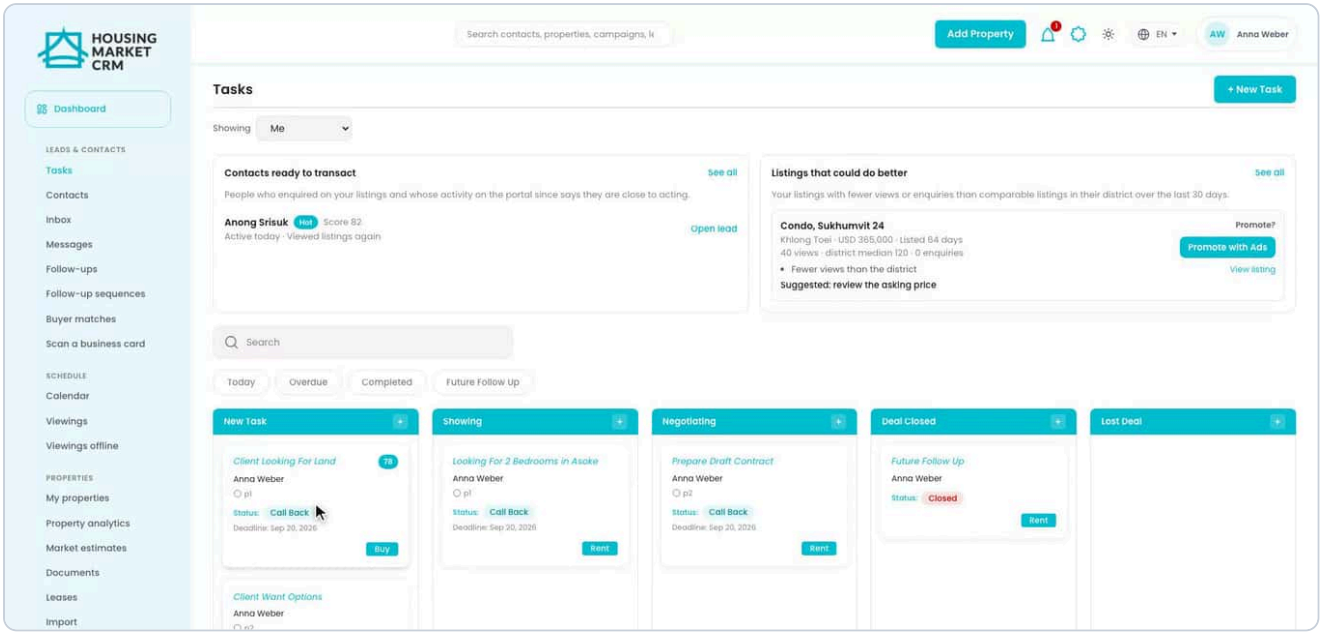


Figure 18.3 · Screen recorded 17 September 2026

4 Response speed, engagement and recent activity all count.

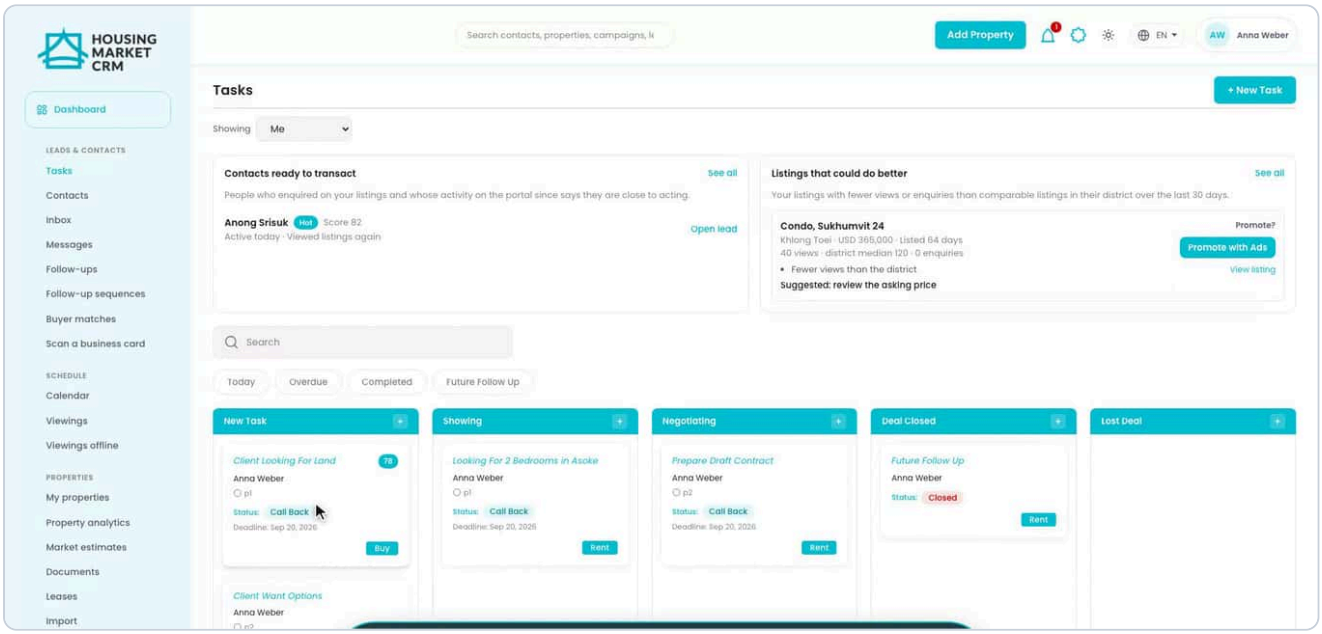


Figure 18.4 · Screen recorded 17 September 2026

5 **Contacts ready to transact** lists your hottest people.

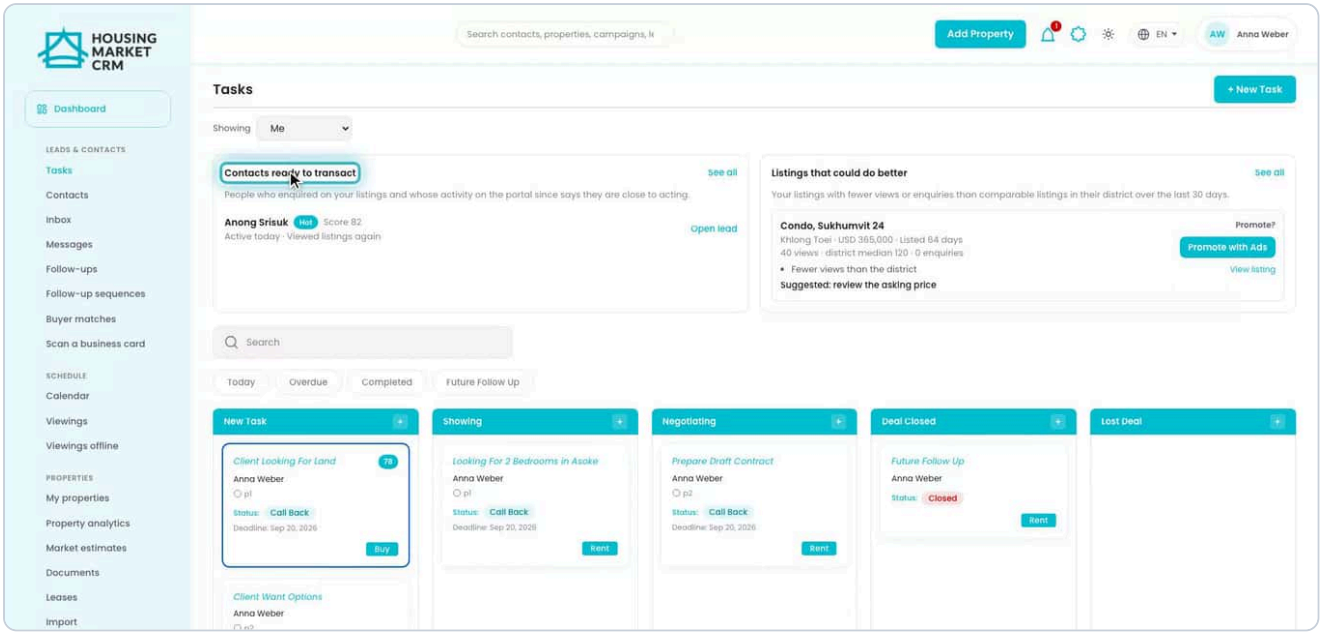


Figure 18.5 · Screen recorded 17 September 2026

6 Call the **highest scores first** when time is short.

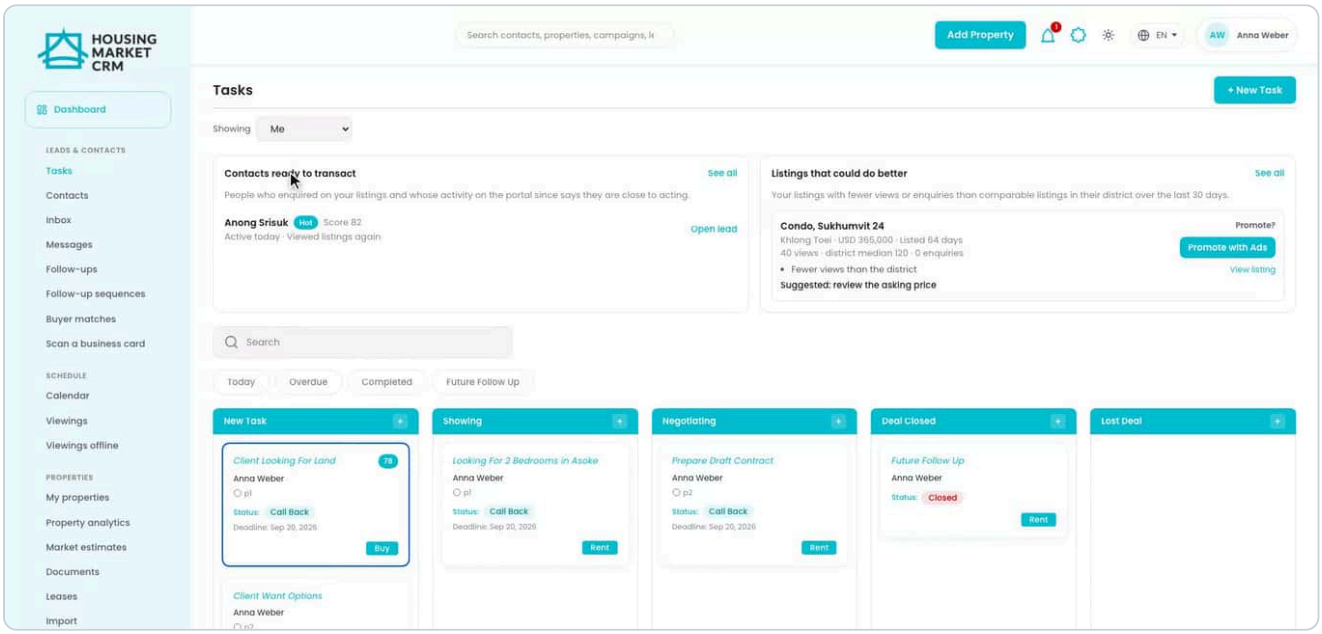


Figure 18.6 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

Can I see which listings a lead has been browsing?	faq.housingmarketgroup.com/faq/can-i-see-which-listings-a-lead-has-been-browsing

19 CHAPTER 19

Reverse matching

Pro and Business | For agents | Watch the video

OVERVIEW

On Pro, when one of your listings goes live the CRM finds the contacts whose requirements it suits, tells you, and lets you send it to them in one step once you confirm they asked for matching properties.

The usual search starts from a buyer and looks for listings that suit them. Reverse matching works the other way round: it starts from a listing and finds the buyers on your list who would want it. It is part of Pro.

- Record what a buyer is looking for on their lead — the market, sale or rent, property type, bedrooms, bathrooms, city and budget.
- When one of your listings is published on the portal, the CRM checks it against those requirements and notifies you that it has matches.
- Open Buyer matches in the left menu. Each of your live listings with matches shows how many of your contacts match it; open one to see who matched and on what.
- Tick “These buyers asked me to send them properties that match what they are looking for.”, then select Send to the matching contacts.

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Buyers from the Germany, Spain and Cyprus portals

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- Open the buyer's lead and find Matching listings by email.
- Tick “This buyer agreed to receive matching listings by email”.
- Under How did they agree?, say how — for example “asked by email on 3 October” — and select Record opt-in.

The date, your note and who recorded it are kept on the contact. Remove opt-in takes it away again.

Who is left out, and how buyers stop these emails

A buyer receives at most 3 of these emails from your account in any 7 days. A buyer who has already had 3 shows as Weekly limit reached and is skipped that time.

A matched buyer who cannot be emailed — there is no contact on the lead, the contact has no email address, they unsubscribed from your emails, their address is suppressed after a bounce, a complaint or an unsubscribe, they need a recorded opt-in, or they reached the weekly limit — is named on the screen with the reason, rather than the send quietly reaching fewer people than it showed you.

The email goes out under your name via the portal, and replies come straight to your own email address. It has no unsubscribe link in the text. Instead, the buyer's email app shows its own one-click unsubscribe option, and the footer tells the buyer to use it or to reply to the email. An unsubscribe stops emails to that address from every agent, not only from you.

Buyer matches is in the menu on every plan. On Free it explains what the feature does and offers Pro instead of a list.

A listing is treated as live when the portal has approved it, whether you added it on the portal or published it from the CRM.

From the Help Center: **How does reverse matching work?**

STEP BY STEP

1 Open a buyer's **lead**.

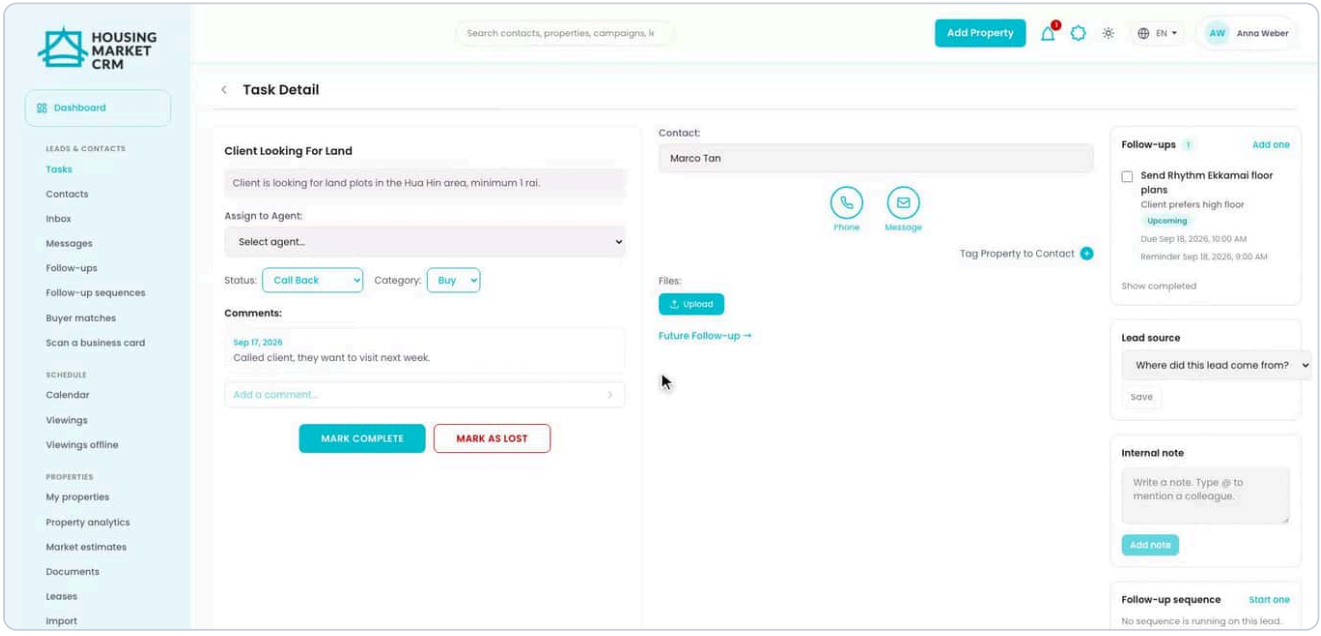


Figure 19.1 · Screen recorded 17 September 2026

2 Find **Buyer requirements**.

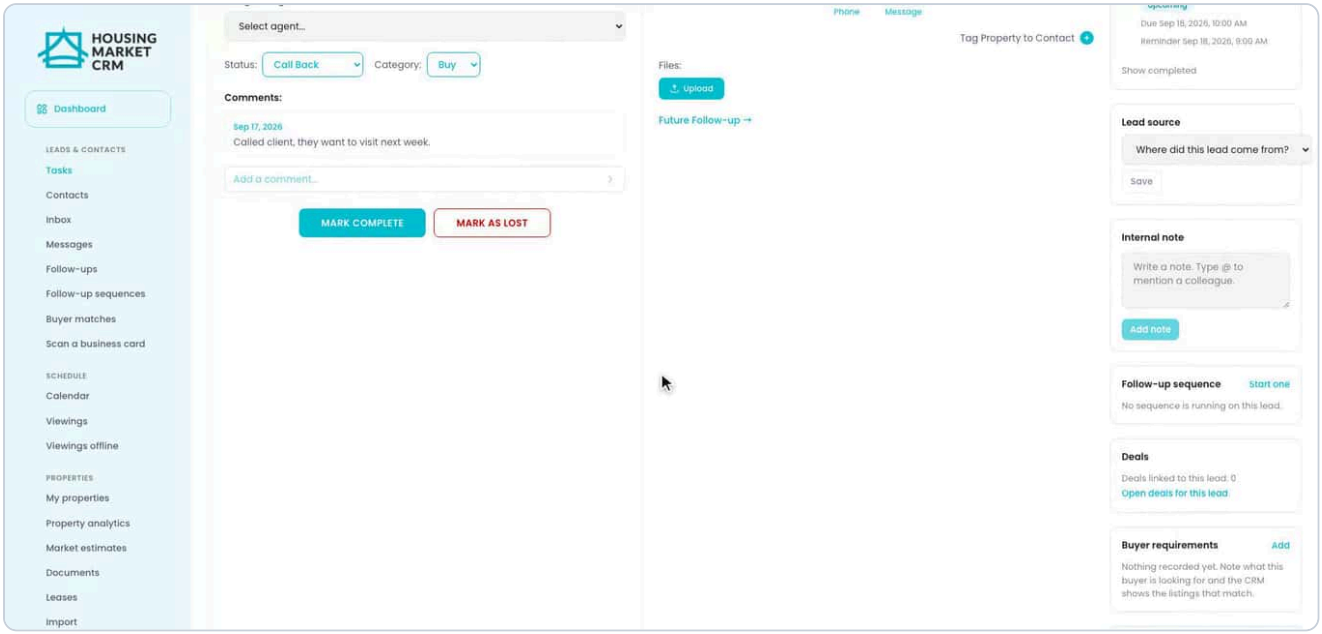


Figure 19.2 · Screen recorded 17 September 2026

3 Click **Add**.

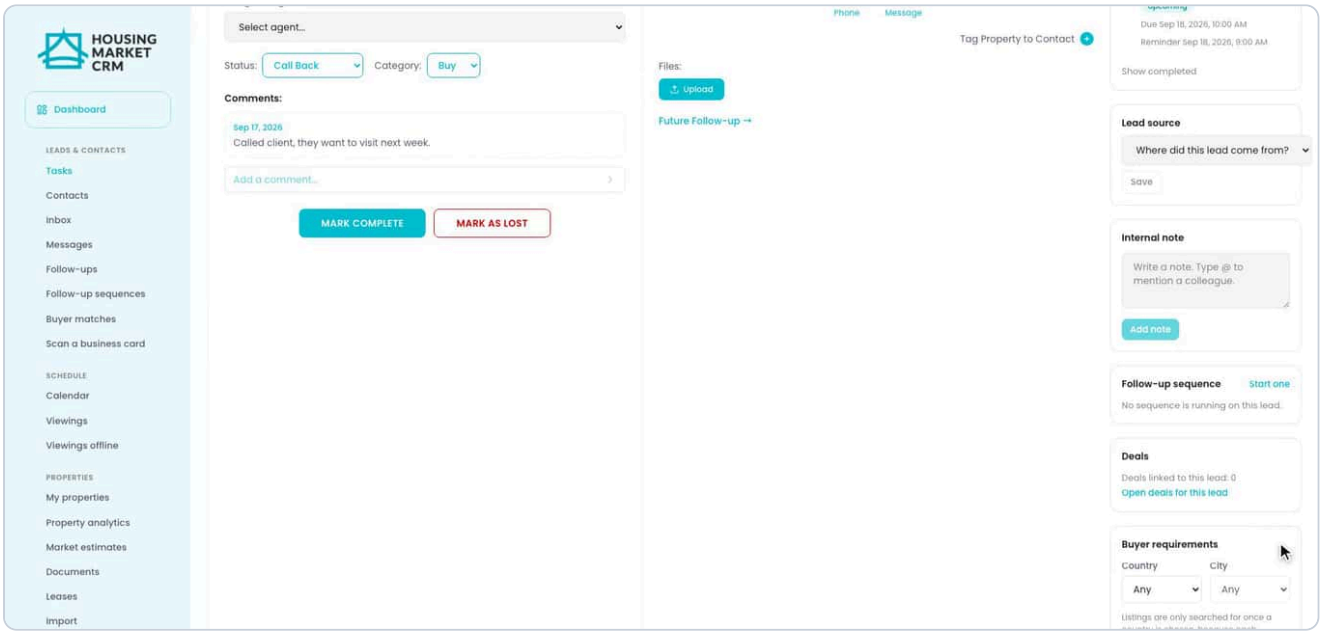


Figure 19.3 · Screen recorded 17 September 2026

4 Set **country**, **city**, **budget**, **property type** and **sale or rent**.

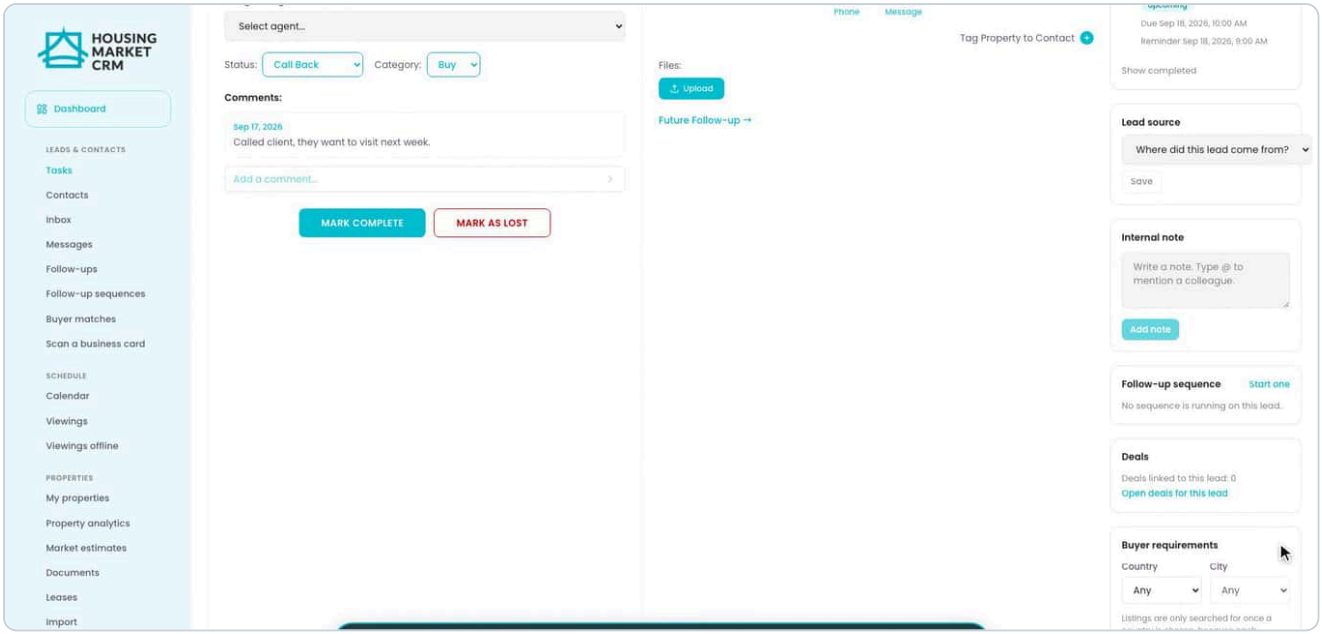


Figure 19.4 · Screen recorded 17 September 2026

5 Enter the **minimum** and **maximum** budget.

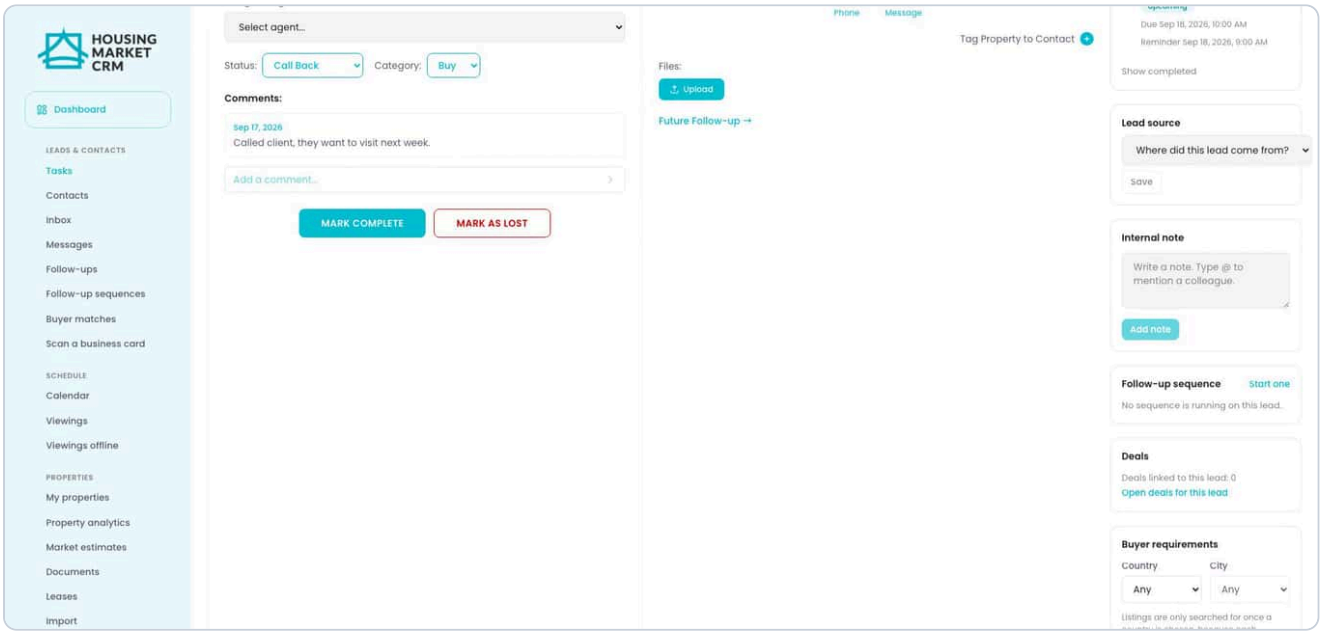


Figure 19.5 · Screen recorded 17 September 2026

6 Save the requirements.

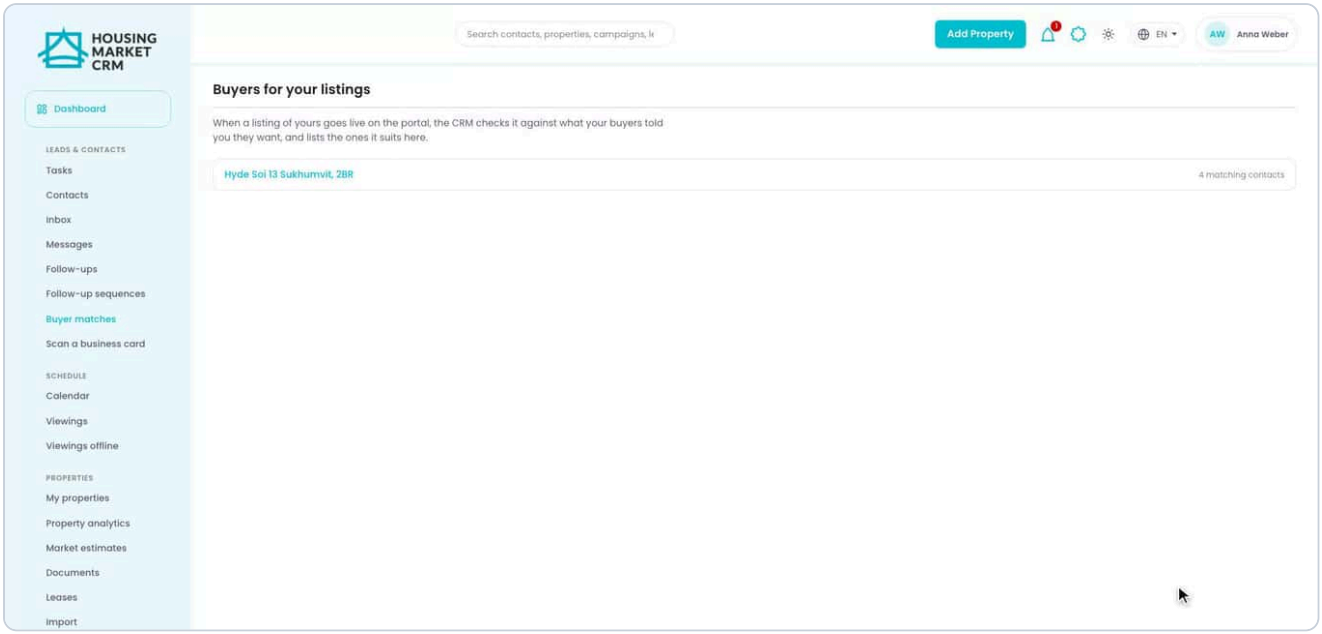


Figure 19.6 · Screen recorded 17 September 2026

7 Matching buyers then appear under **Buyer matches**.

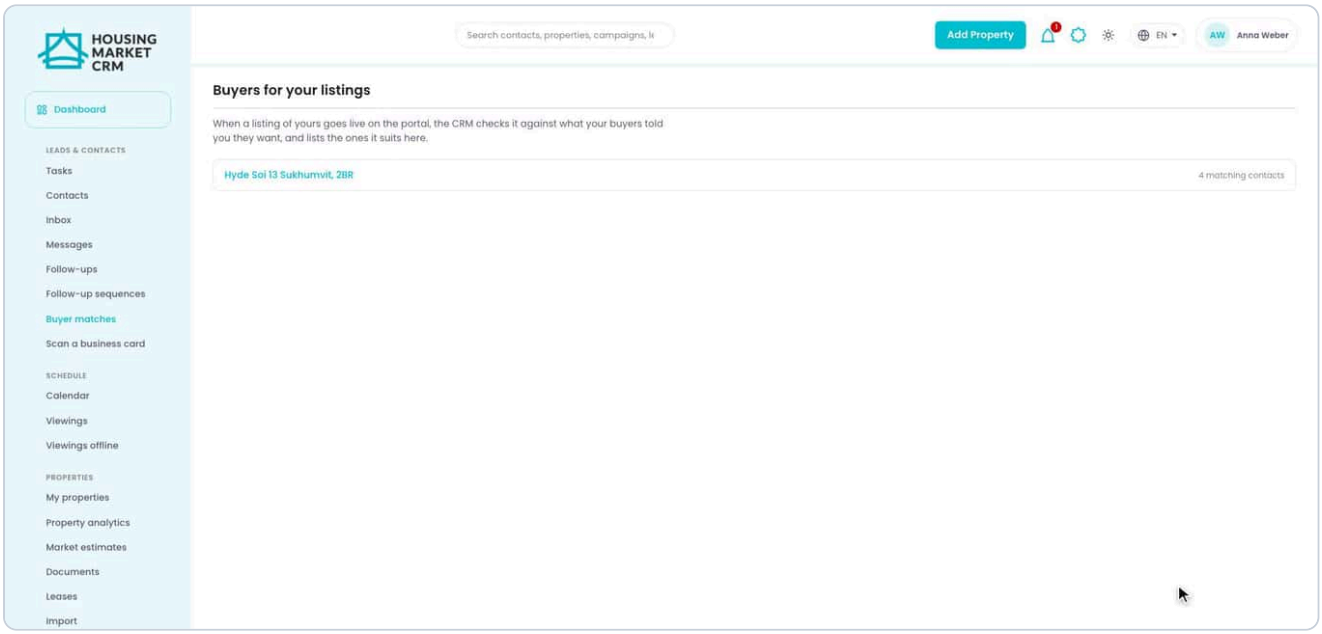


Figure 19.7 · Screen recorded 17 September 2026

8 When a listing that fits goes live, this buyer is **listed for it**.

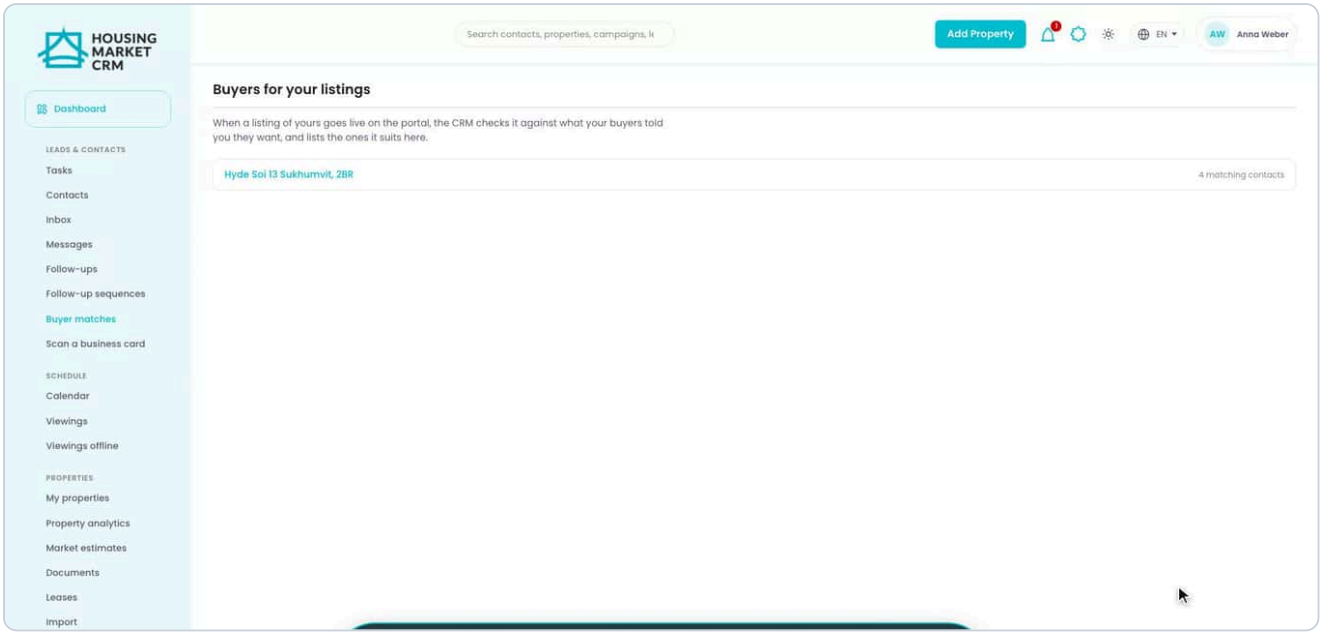


Figure 19.8 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

Can I manage all my contacts? faq.housingmarketgroup.com/faq/can-i-manage-all-my-contacts

20 CHAPTER 20

Follow-up sequences

Pro and Business | For agents | Watch the video

OVERVIEW

On Pro, a sequence is a follow-up cadence you define once. Enrol a lead and each next step lands on your follow-up list when it falls due.

A follow-up on its own is free and always will be: give a lead a date, and the CRM reminds you. A sequence is the template that does that for you over and over — call on day one, send listings a few days later, check in the week after — defined once and applied to any lead you enrol. Sequences are part of Pro.

When a step falls due it becomes an ordinary follow-up on your list, with the same due and overdue notifications as any other. The sequence does not send emails or messages by itself; it makes sure the next step is in front of you on the right day, so nothing depends on remembering.

Sequences put steps on your own list. Emailing quiet leads new listings automatically is nurture — see "How does nurture work?".

If an account drops below Pro, sequences already running keep raising their steps, so work you planned is not silently lost. Creating new sequences and enrolling new leads needs Pro again.

From the Help Center: **What are follow-up sequences?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

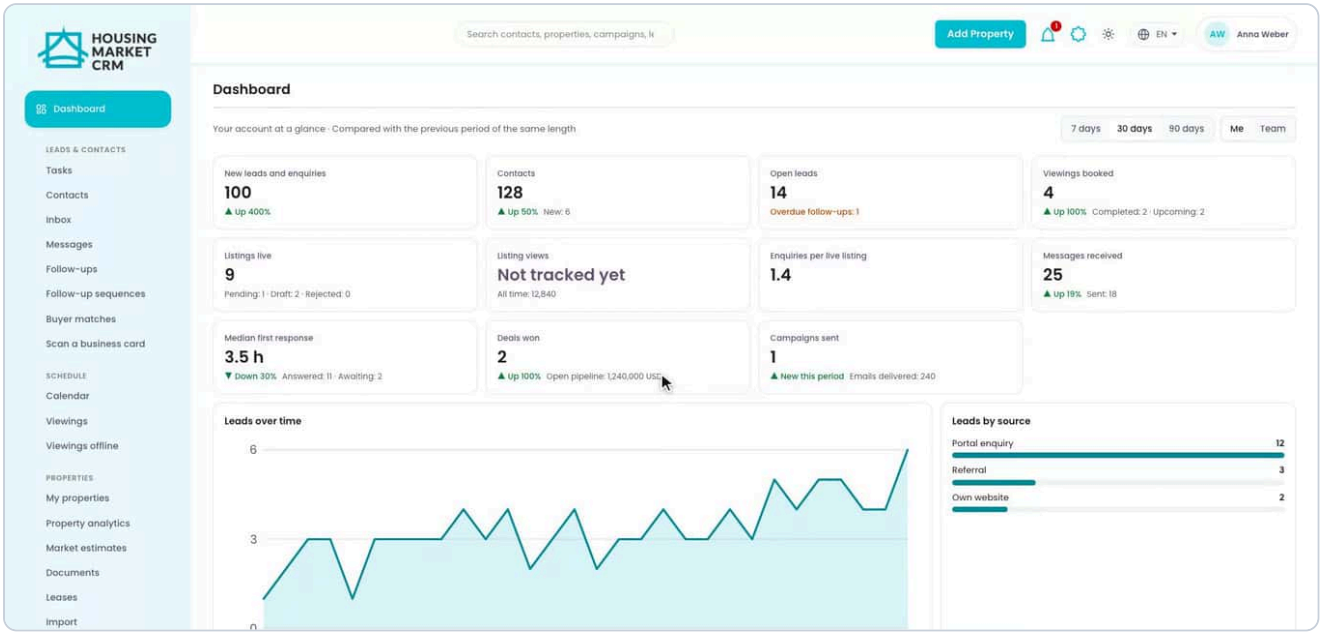


Figure 20.1 · Screen recorded 17 September 2026

2 Click **Follow-up sequences** in the left menu.

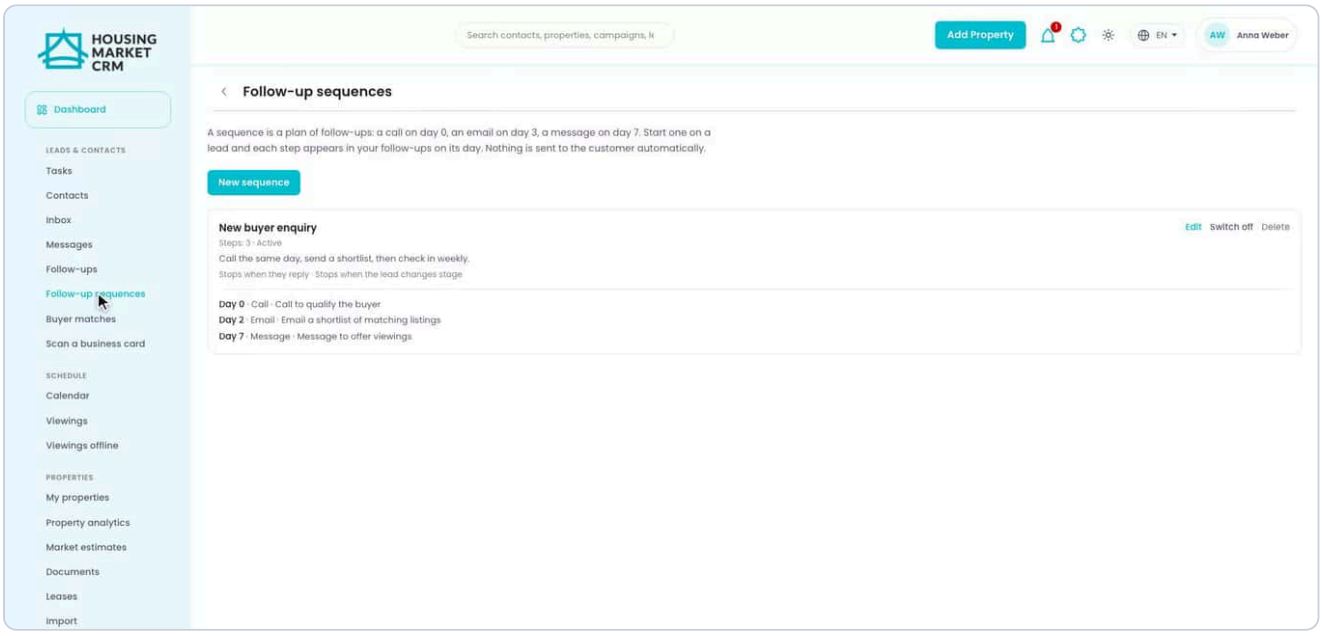


Figure 20.2 · Screen recorded 17 September 2026

3 A sequence is a series of **follow-up steps**.

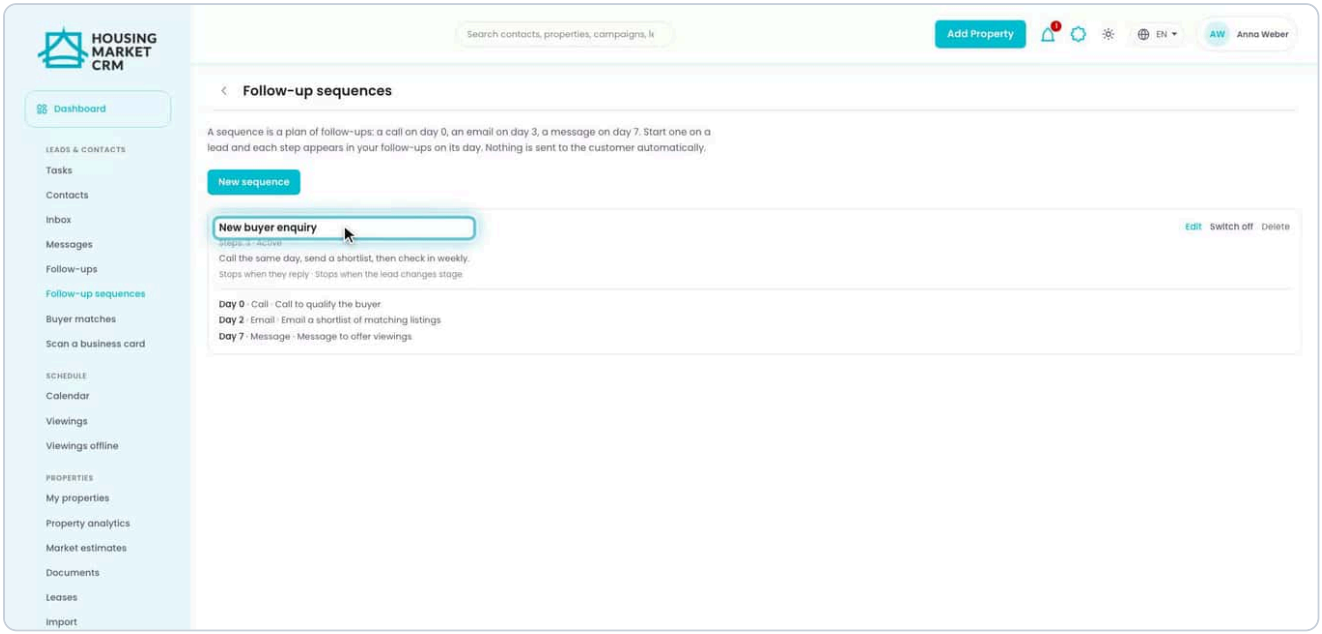


Figure 20.3 · Screen recorded 17 September 2026

4 Use **Switch off** to pause a sequence.

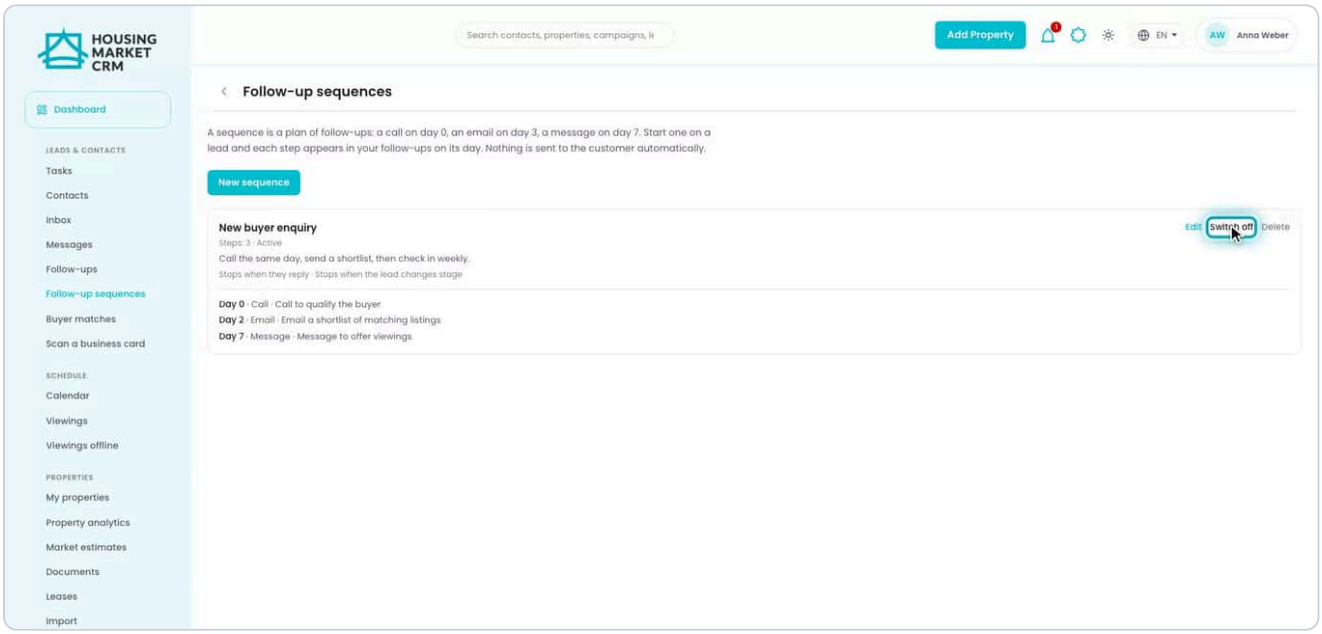


Figure 20.4 · Screen recorded 17 September 2026

5 Click **Edit** to change its steps.

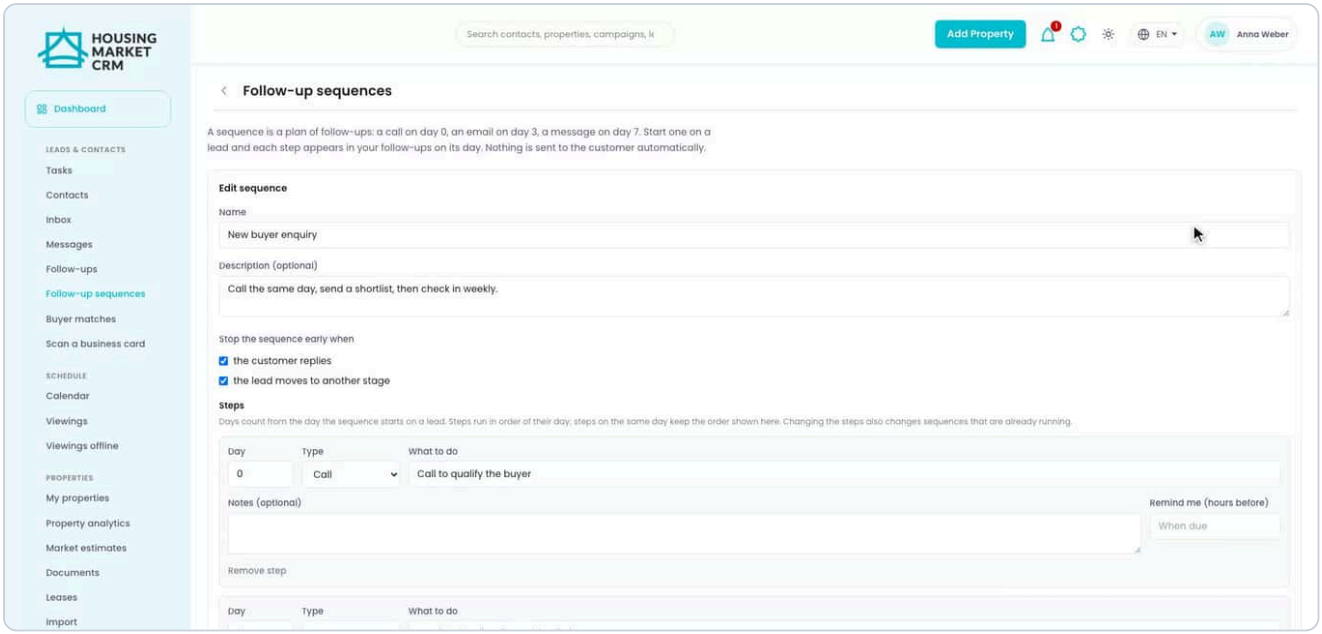


Figure 20.5 · Screen recorded 17 September 2026

6 Set what happens on each step and **how many days** later.

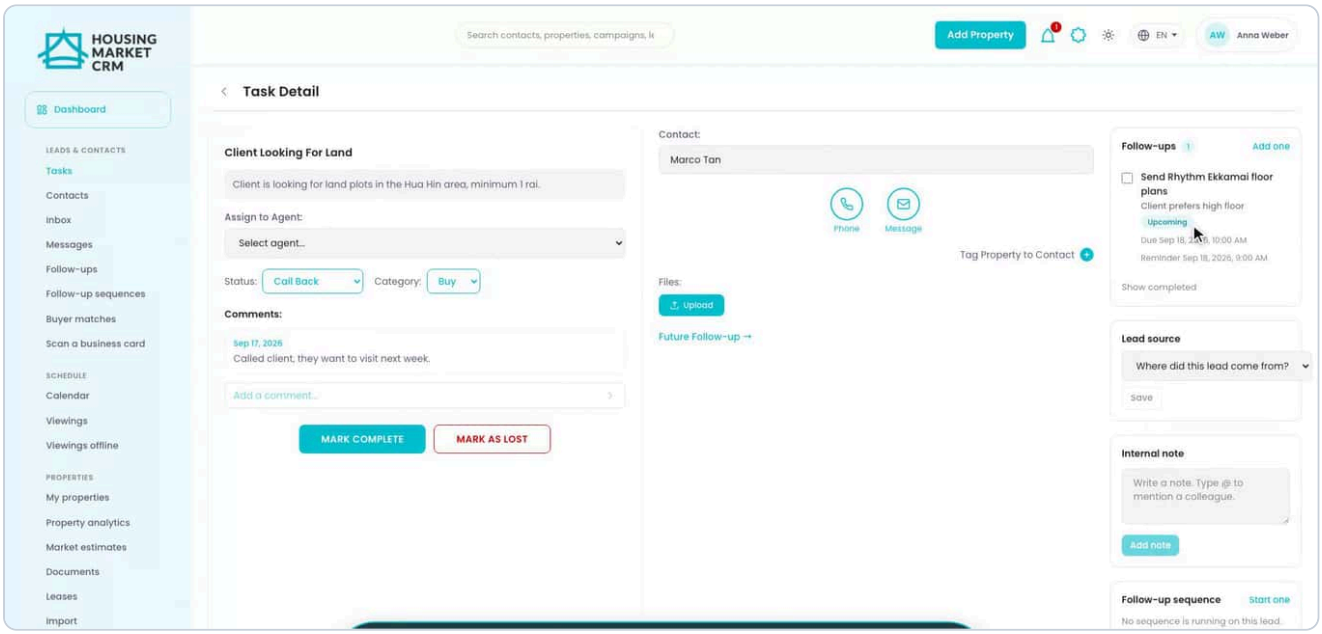


Figure 20.6 · Screen recorded 17 September 2026

7 On a lead, find **Follow-up sequence** and click **Start one**.

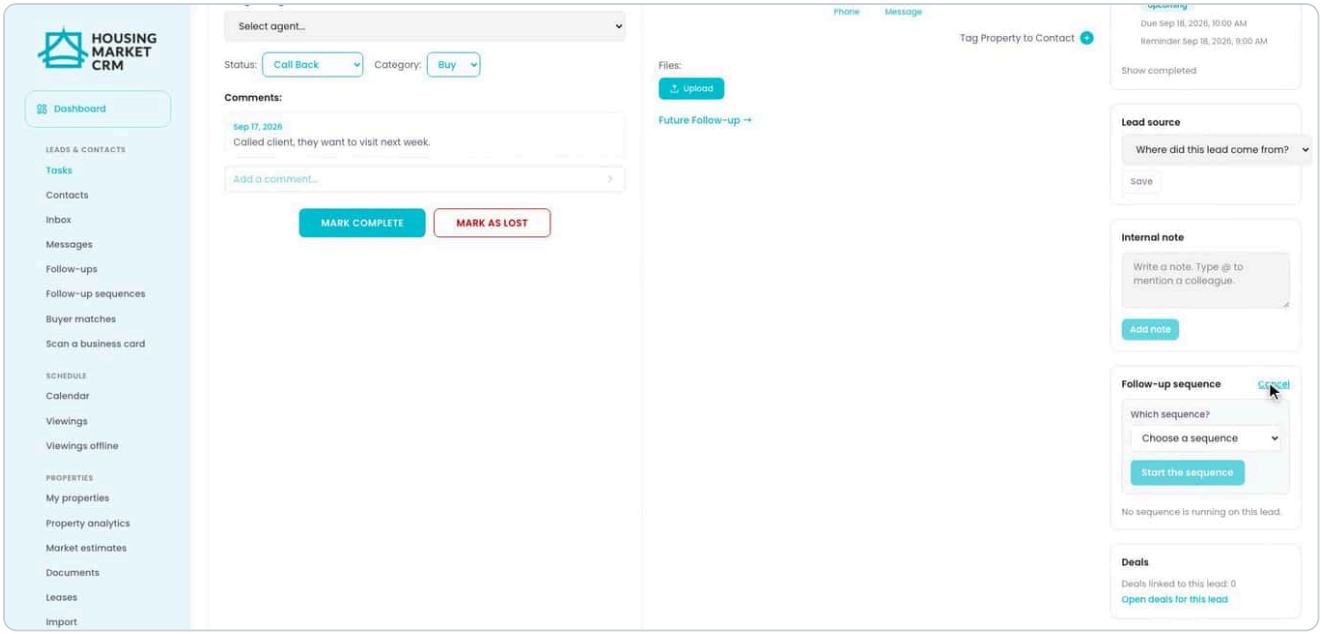


Figure 20.7 · Screen recorded 17 September 2026

8 Every step now happens **on schedule**.

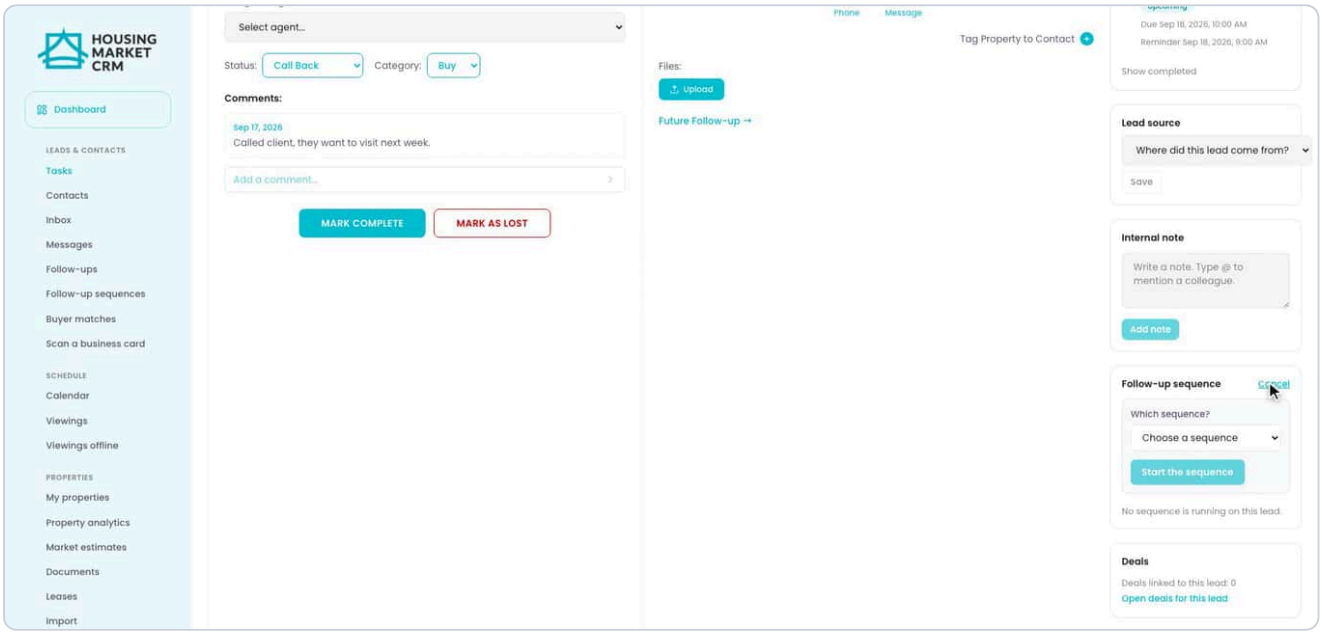


Figure 20.8 · Screen recorded 17 September 2026

GOOD TO KNOW

TIP

Yes. A follow-up reminds you when it falls due, unless you untick "Remind me when it is due", and the CRM notifies you again if it is still open a day later.

Help Center: Does the CRM include reminders?

21 CHAPTER 21

Keep cold leads warm

Pro and Business | For agents | Watch the video

OVERVIEW

On Pro, nurture emails new matching listings to contacts whose leads have gone quiet, using the brief you recorded. You switch it on under Nurture and can pause it per contact.

When a lead with a brief — what the buyer or tenant is looking for — goes quiet, nurture emails that contact new listings that match it. It checks once an hour, never sends the same listing to the same person twice, and respects unsubscribes. It is part of Pro.

Switching it on

- In the sidebar, under Marketing, open Nurture.
- Tick Send matching listings to cold leads.
- Set Cold after (days), At most one email every (days) and Listings per email.
- Optionally write your own email subject and opening text, then choose Save.

A contact counts as cold only when none of their open leads has had any activity for that many days, nobody on your team has worked on them in that time, and they have not answered a shortlist. The Nurture activity panel on the same page lists the latest emails, the cold leads with a brief, and the contacts you have paused.

Pausing it for one contact

Open the contact and, in the Listings that fit panel, choose Pause nurture; Resume nurture turns it back on. Listings you send yourself from that panel still go out while nurture is paused.

From the Help Center: **How does nurture work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

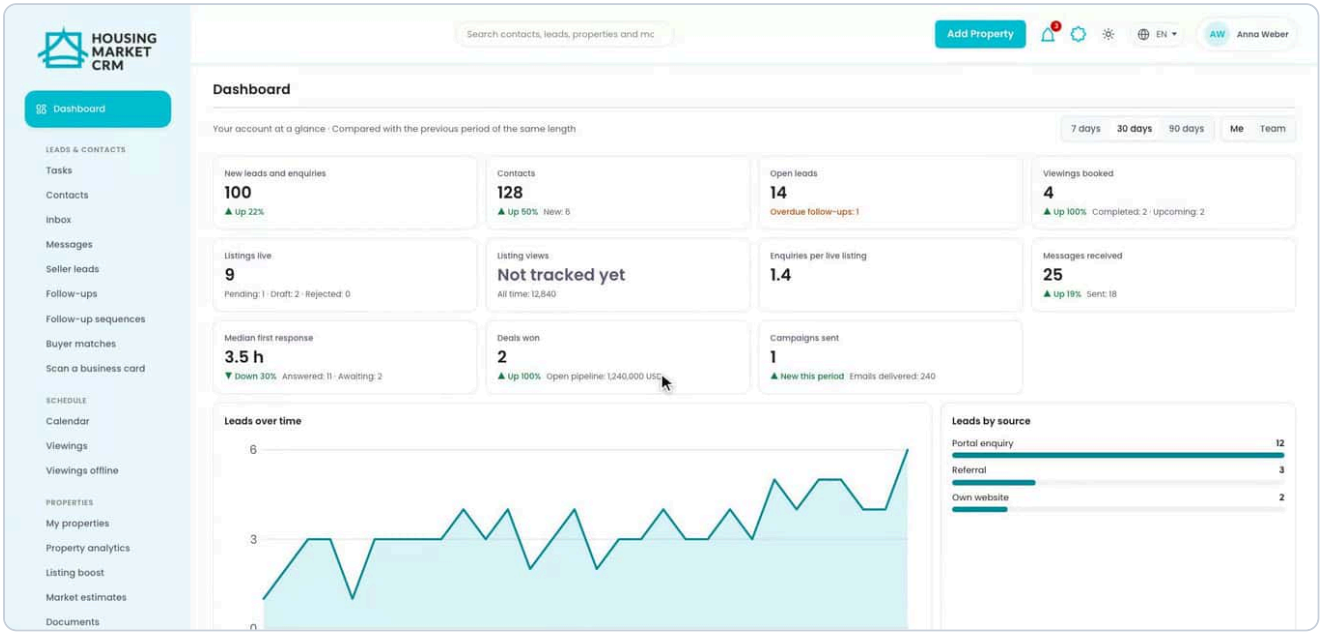


Figure 21.1 · Screen recorded 8 October 2026

2 Click **Nurture** in the left menu.

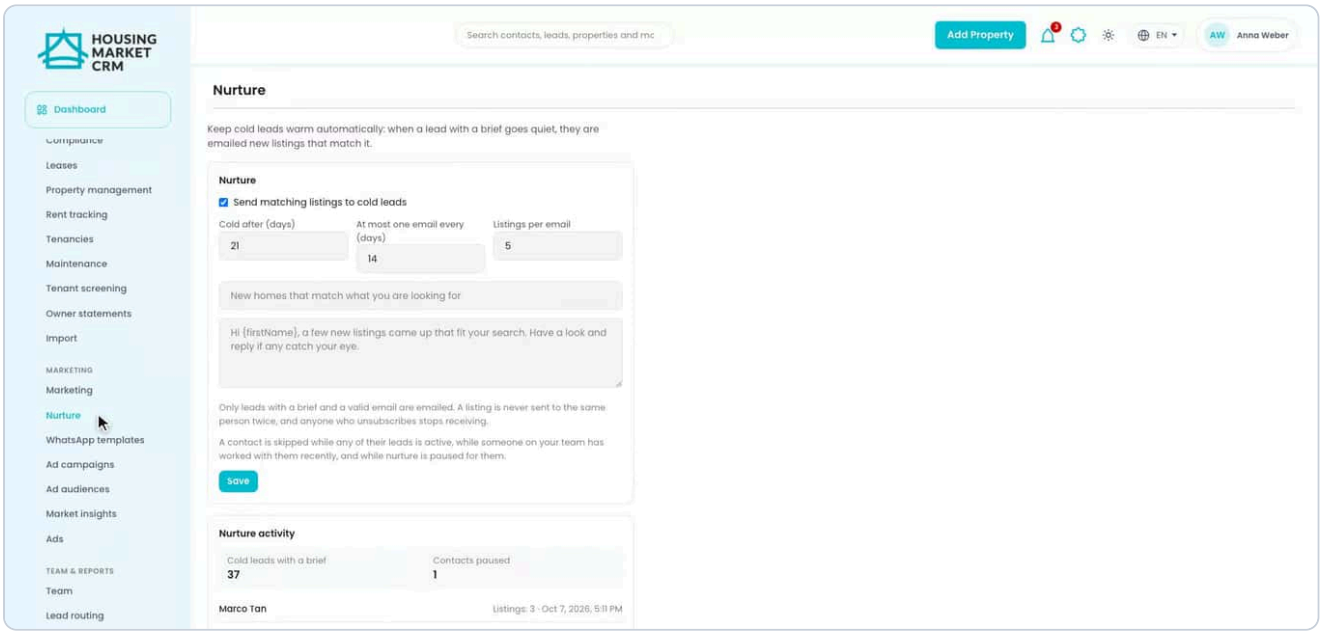


Figure 21.2 · Screen recorded 8 October 2026

3 A lead with a **brief** goes quiet — and is emailed listings that match it.

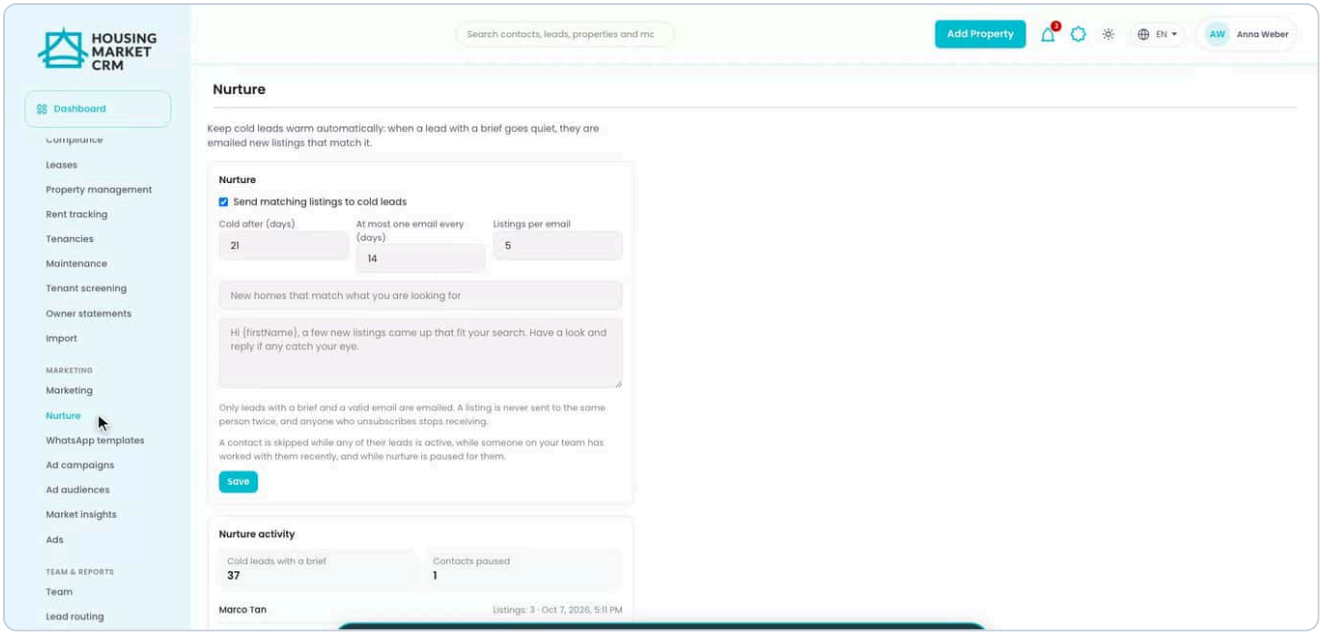


Figure 21.3 · Screen recorded 8 October 2026

4 Decide **when** it starts and **how often** it writes.

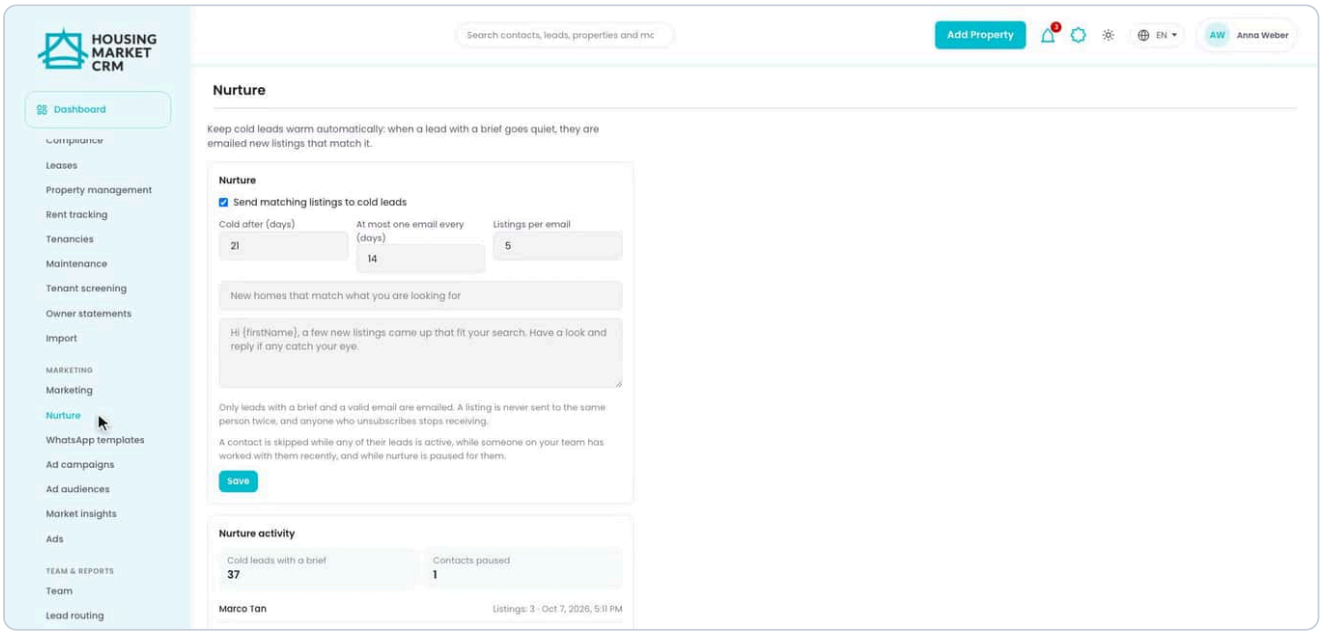


Figure 21.4 · Screen recorded 8 October 2026

5 Keep it low: one matching listing a fortnight is welcome. A weekly digest is not.

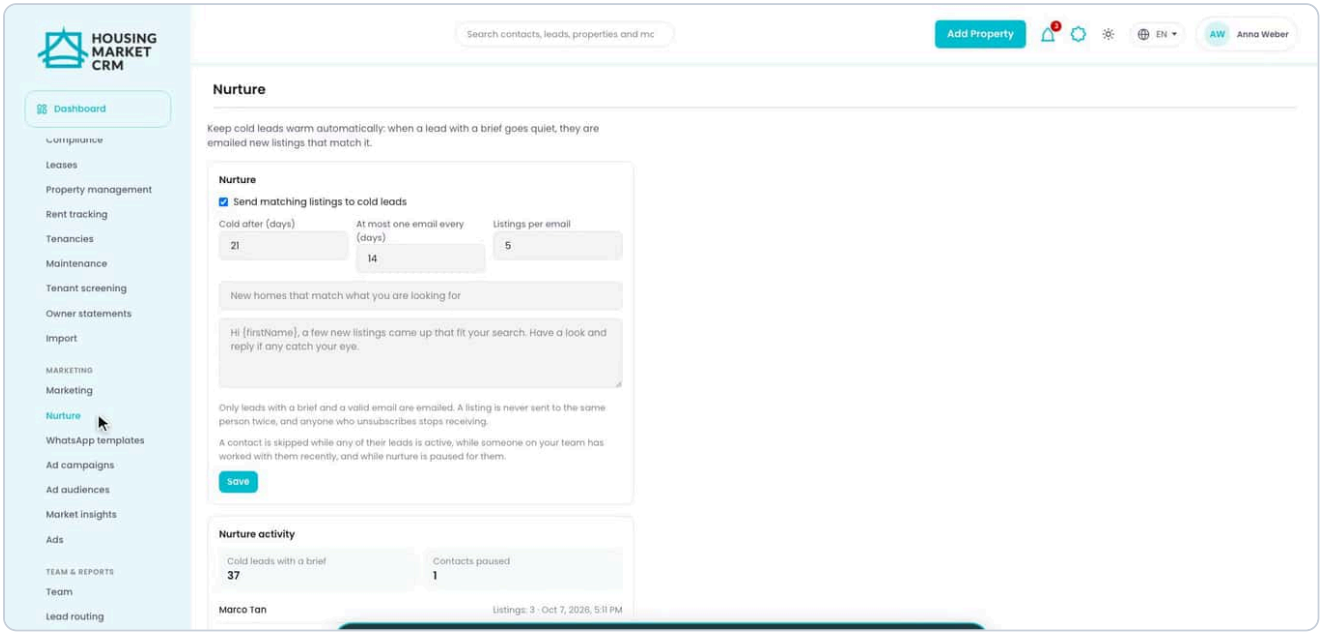


Figure 21.5 · Screen recorded 8 October 2026

6 Press **Save**.

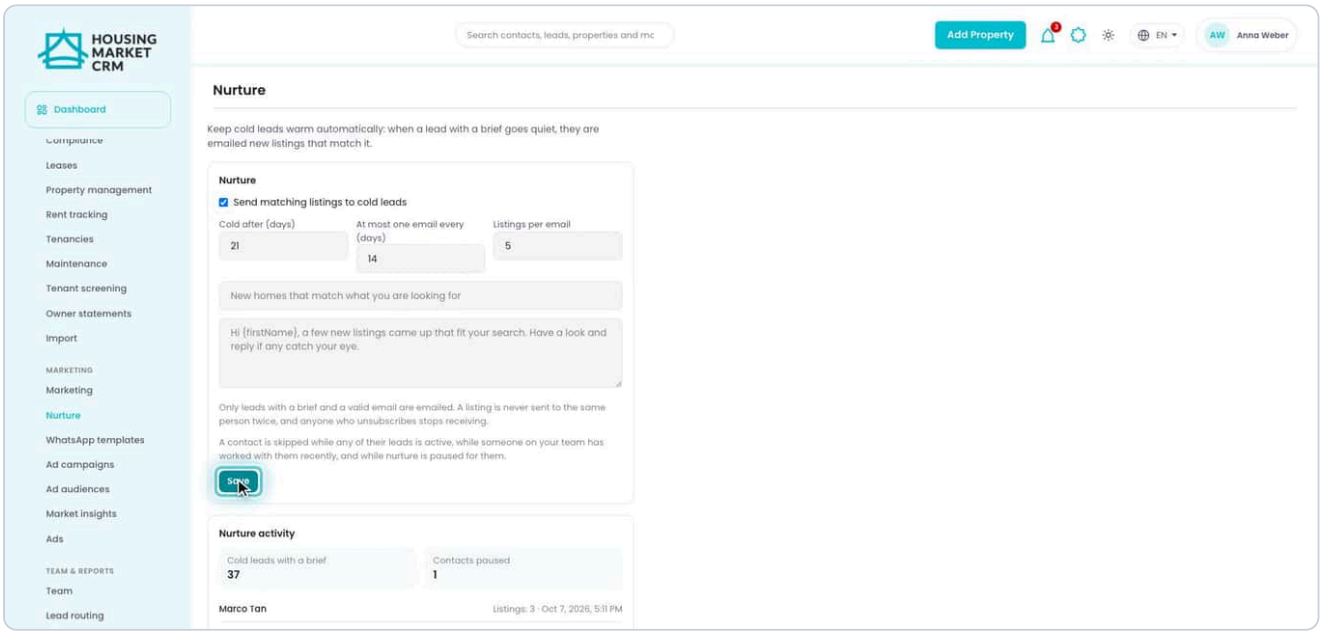


Figure 21.6 · Screen recorded 8 October 2026

7 The **activity log**: read it before you ring anyone.

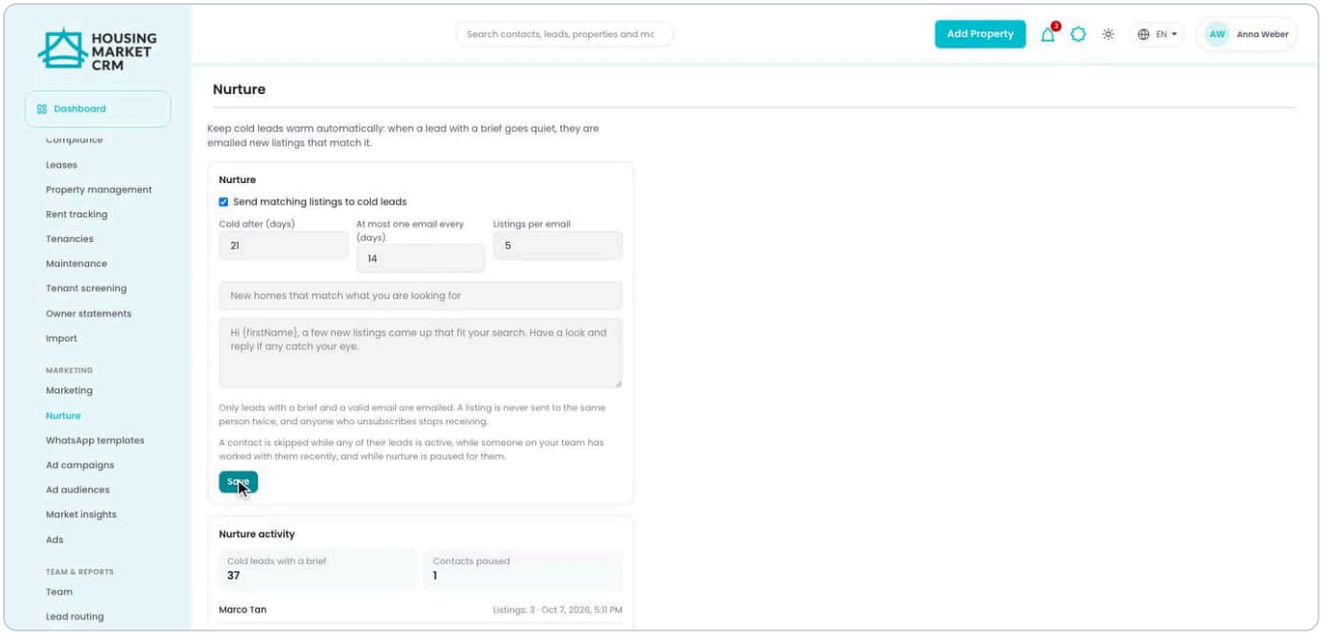


Figure 21.7 · Screen recorded 8 October 2026

8 A lead with **no brief** has nothing to match — so fill it in early.

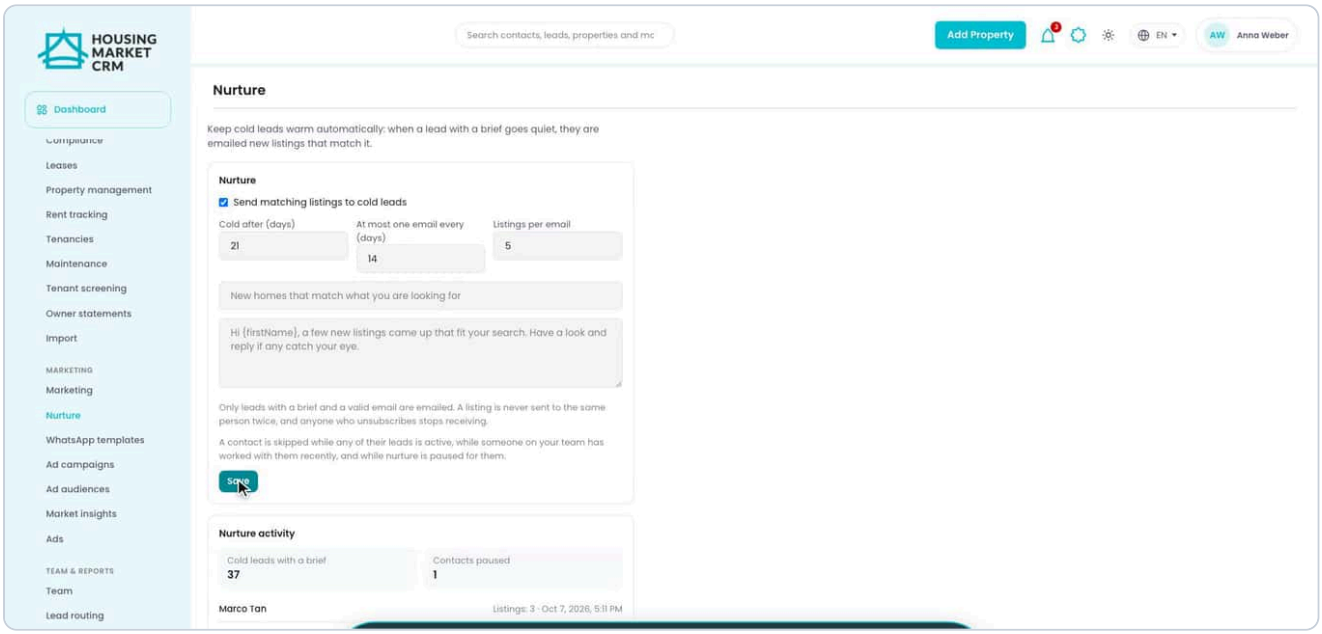


Figure 21.8 · Screen recorded 8 October 2026

9 **Pause** a contact while you are in touch directly — and let it resume after.

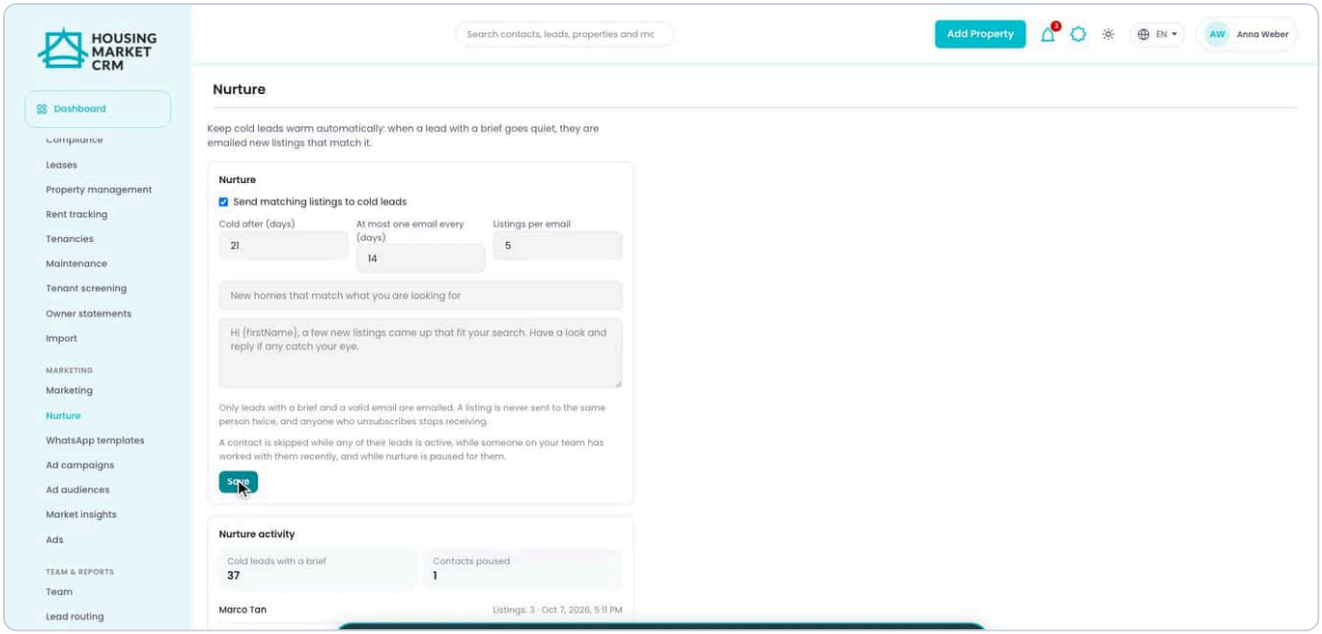


Figure 21.9 · Screen recorded 8 October 2026

10 Most leads never say no. They go quiet, and buy from whoever stayed in touch.

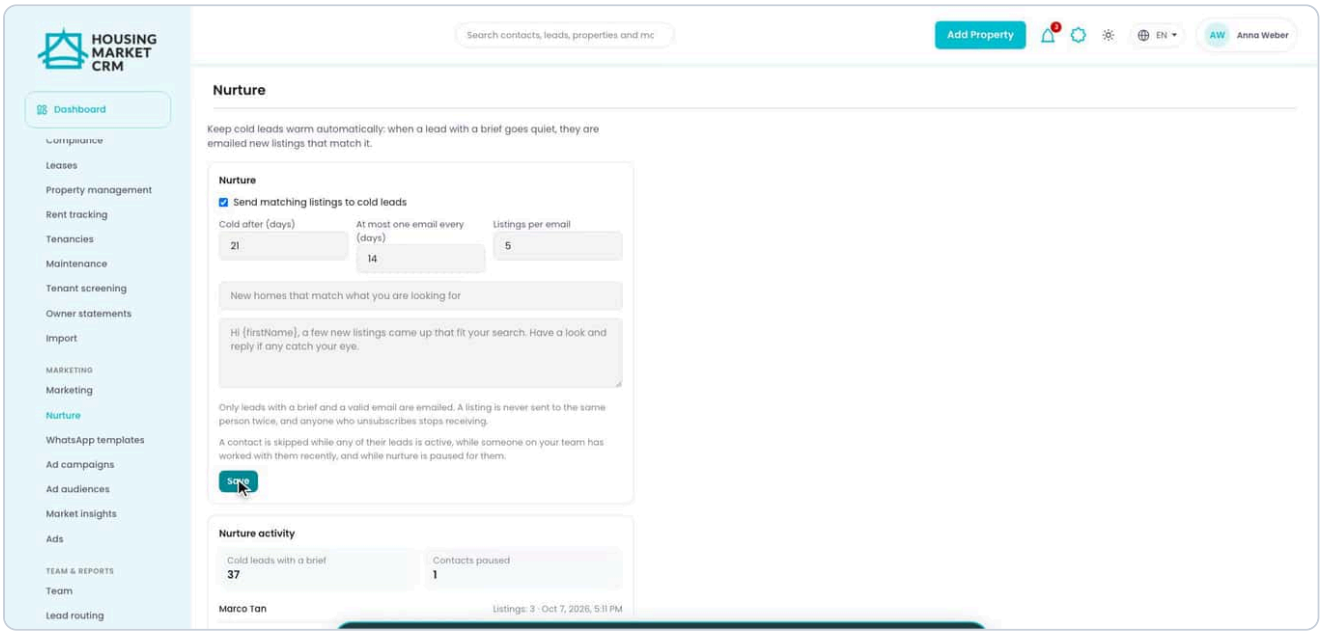


Figure 21.10 · Screen recorded 8 October 2026

RELATED HELP CENTER ARTICLES

What are follow-up sequences? faq.housingmarketgroup.com/faq/what-are-follow-up-sequences

22 CHAPTER 22

Buy a seller lead

All plans | For agents | Watch the video

OVERVIEW

An introduction to a homeowner who ran a market estimate on a portal and asked to hear from agents in their area. It arrives without their contact details; unlocking it costs 10 USD, once, and the details are then revealed to you. It is not exclusive.

A seller lead is an introduction to somebody who wants to sell or let out their own home. They asked a Housing Market portal what it is worth, and at the end of that they asked to be put in front of the agents who work their area. Choose Seller leads in the menu to see the ones you have been sent.

What arrives, and what does not

You are shown the area, the property — type, bedrooms, bathrooms, floor area where the homeowner gave them — the market estimate they were shown, and whether they want to sell or to rent it out.

You are not shown who they are. The introduction arrives without the homeowner's name, email address or telephone number, and without the exact address: the area is enough to tell you whether this is your patch, and their details are not yours until you have paid for the introduction.

What it costs

Unlocking one introduction costs 10 USD, once. The contact details are then revealed to you and you can call.

It is a fixed fee for that one introduction. It is never a commission, never a share of what the property sells or lets for, and never anything that depends on how the conversation goes — nothing in Housing Market Group is priced on an outcome. It is not a subscription either: it is charged once, for that introduction, and no plan includes any allowance of them.

It is not refunded. What you bought is the homeowner's contact details and the chance to make the call, and you have both the moment the payment goes through — whatever the homeowner then says, and whether or not they answer at all. That is the same reasoning as the verified agent fee, which pays for the review and not for its outcome.

It is not exclusive

Every agent registered on that portal who works that city is sent the same introduction, and each of them pays separately if they want it. Several agents may unlock the same one. Unlocking it first reserves nothing and buys no head start, and no agent is given a city to themselves — so if you decide to pay for one, decide it on the property and not on a race.

We do not say how many agents were sent one, how many unlocked it, or how many of these arrive in a month. None of those is something we would be able to stand behind, and a figure a reader plans around is worse than no figure.

Who is sent one

Two things decide it, and nothing else: you are registered as an agent on the portal the property is on, and you work the city the property is in. An account with no working email address cannot be sent one at all, because the introduction arrives by email as well as in the CRM.

The verified agent badge is not part of it. It is a public trust mark that tells a buyer who you are, and it opens nothing here — an agent on the free plan without it is sent exactly what a verified agent on Business is sent. Nor does your plan: Seller leads is on every plan, free included, because what is charged for is the introduction and not the screen.

It is switched on

Introductions are being sent. Each one arrives masked, and the details of the homeowner are revealed to you only once you have paid to unlock it, so the portal never hands one out for nothing. Seller leads is in the menu; if the page is empty, no introduction for your city has reached you yet, and nothing is missing from your account.

From the Help Center: **What are seller leads, and what does one cost?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

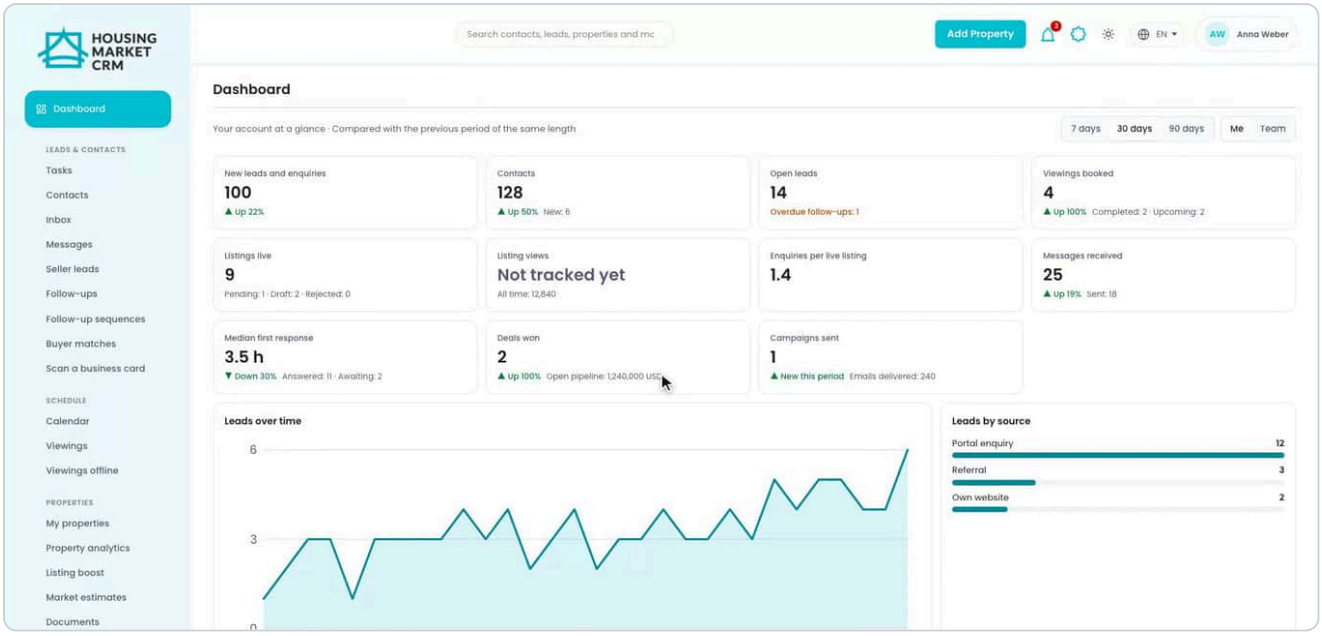


Figure 22.1 · Screen recorded 8 October 2026

2 Click **Seller leads** in the left menu.

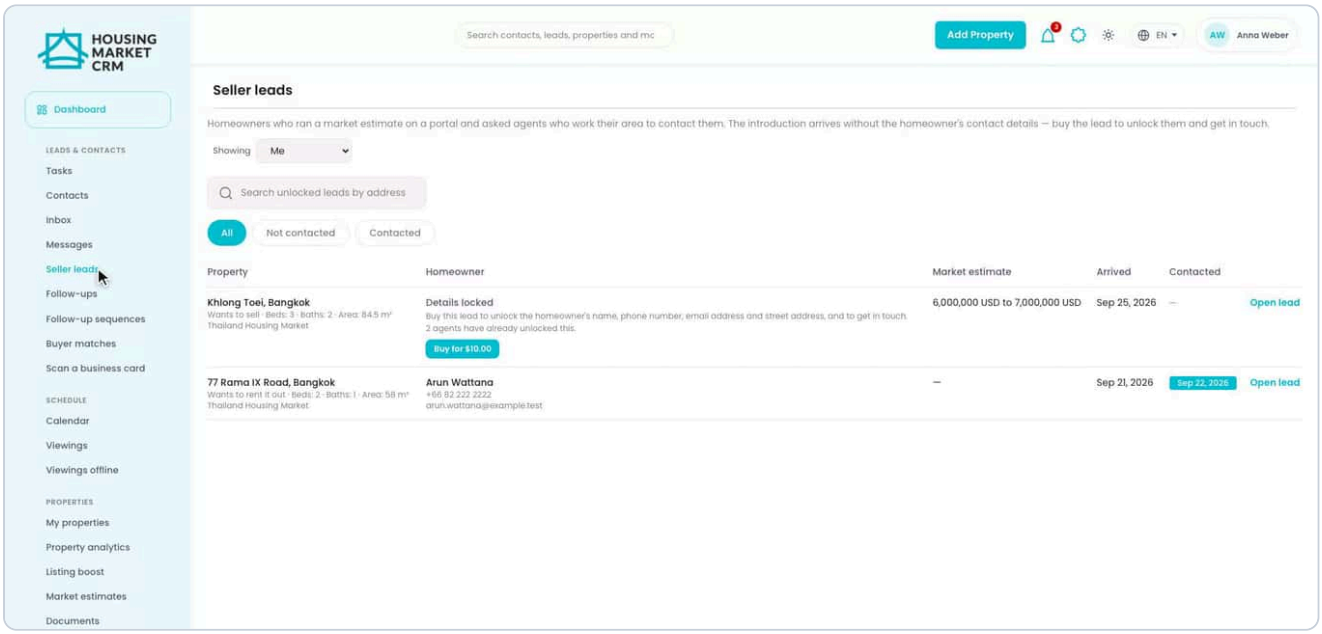


Figure 22.2 · Screen recorded 8 October 2026

3 Homeowners who ran a **market estimate** and asked to be contacted.

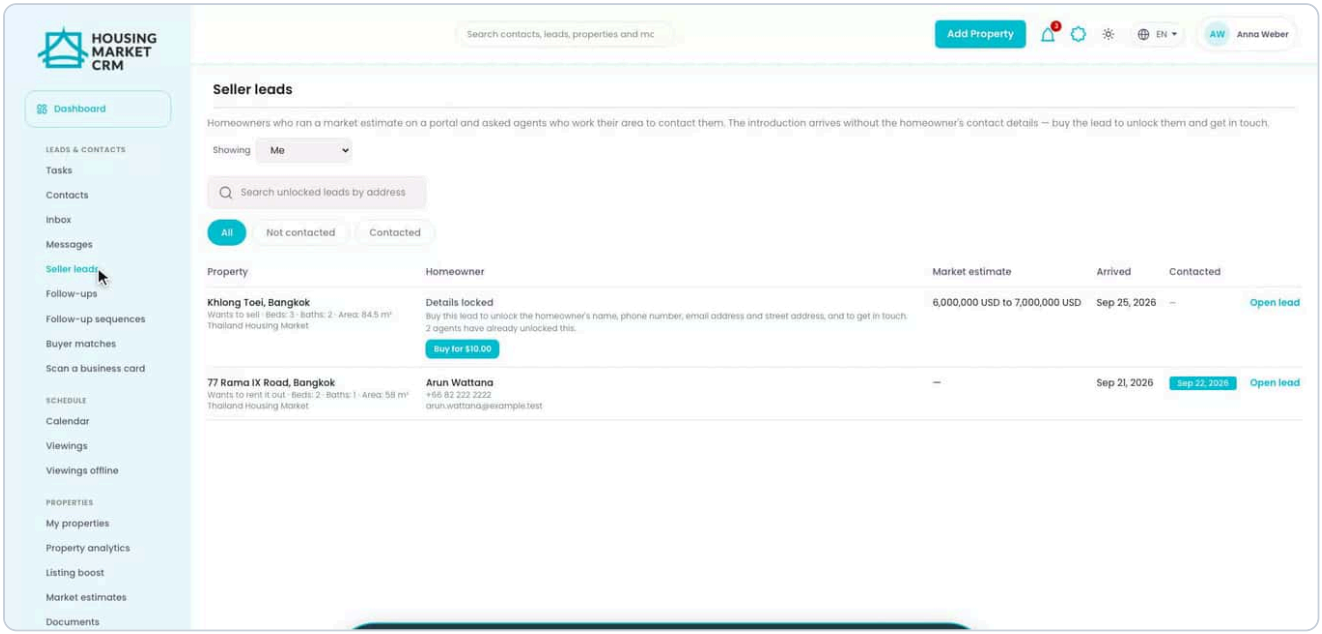


Figure 22.3 · Screen recorded 8 October 2026

4 You see the **address** and the property. Their details stay hidden.

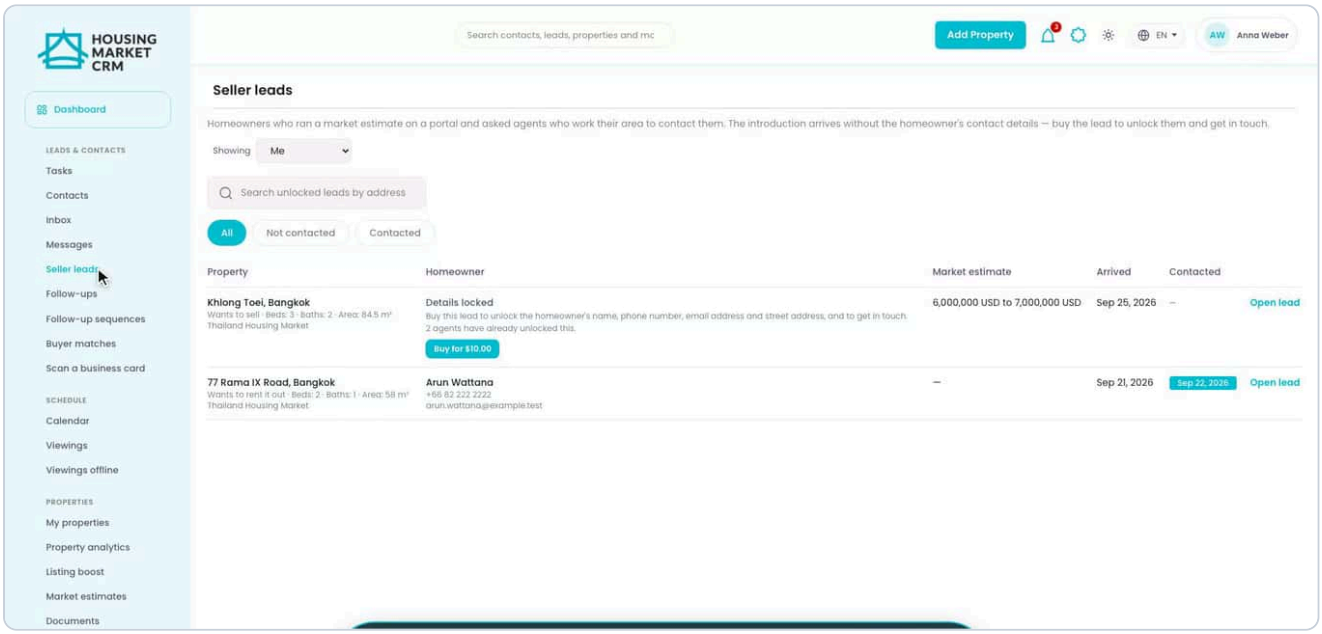


Figure 22.4 · Screen recorded 8 October 2026

5 Work **Not contacted** first.

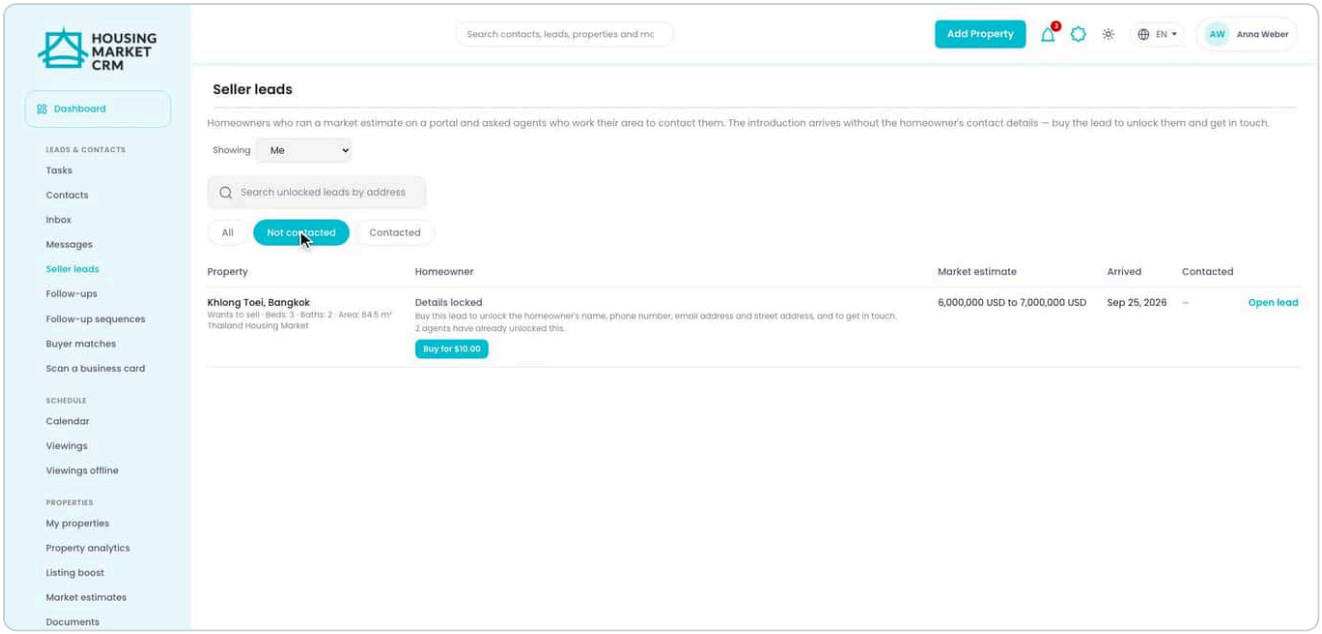


Figure 22.5 · Screen recorded 8 October 2026

6 A homeowner who asked, and heard nothing for a week, is lost.

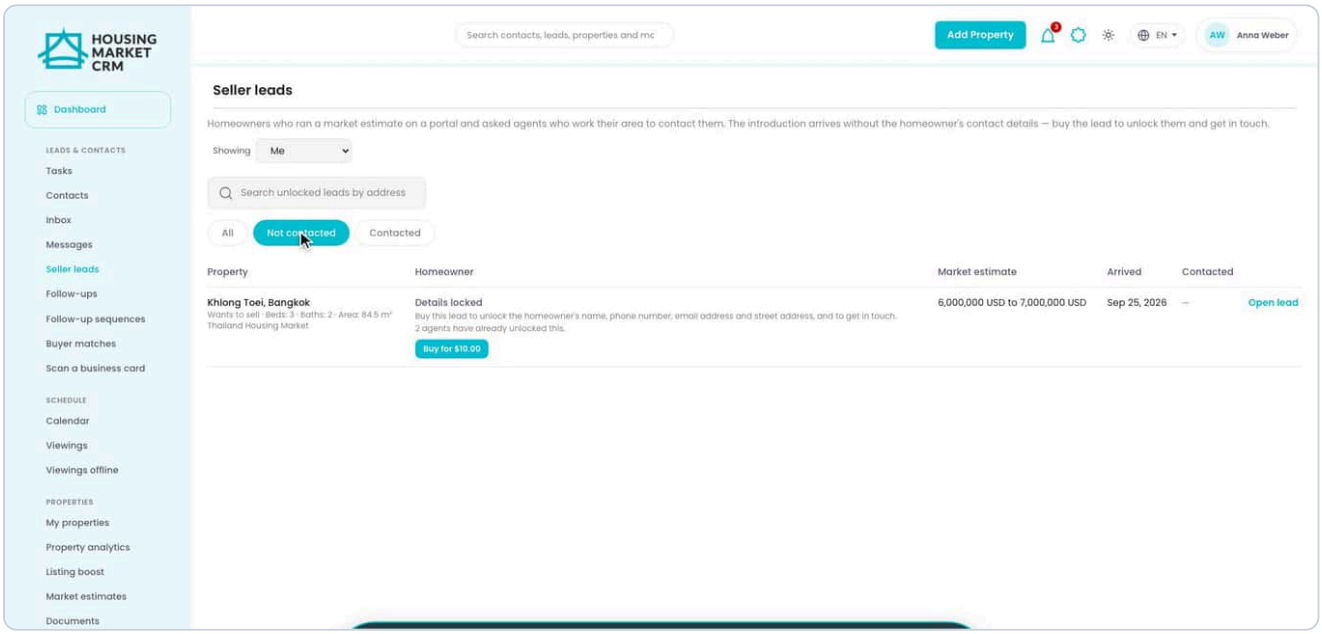


Figure 22.6 · Screen recorded 8 October 2026

7 The **price is on the button** before you commit.

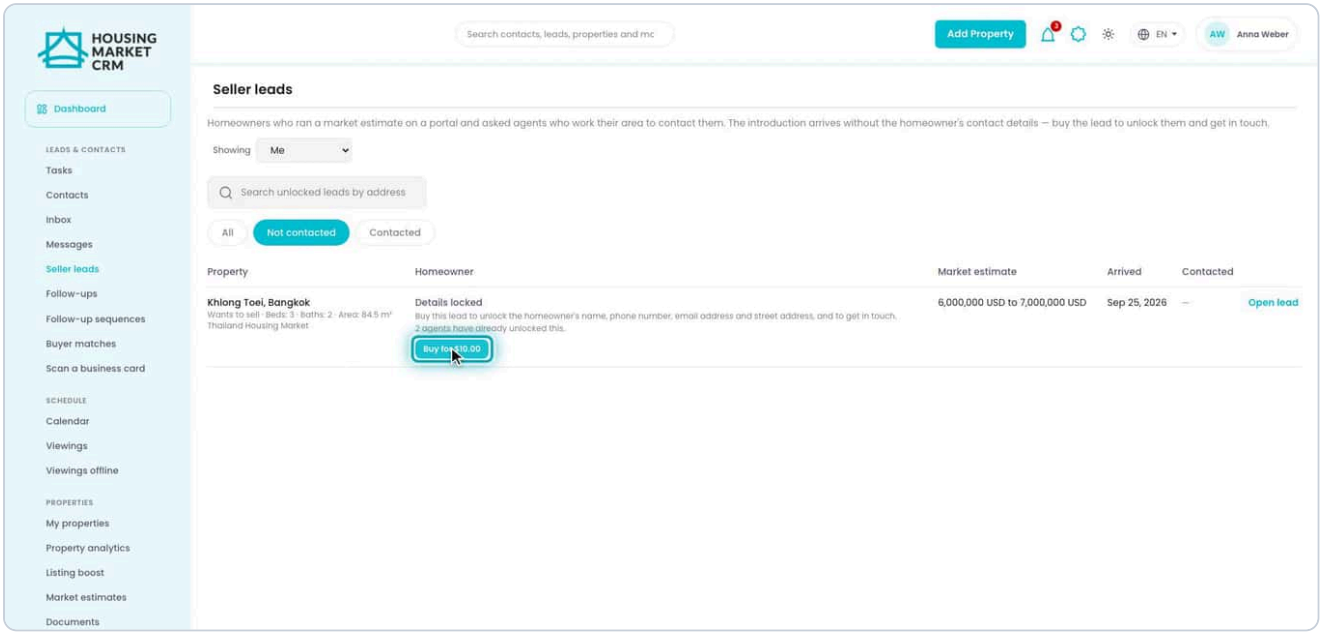


Figure 22.7 · Screen recorded 8 October 2026

8 Once bought it lands on your board like any other lead.

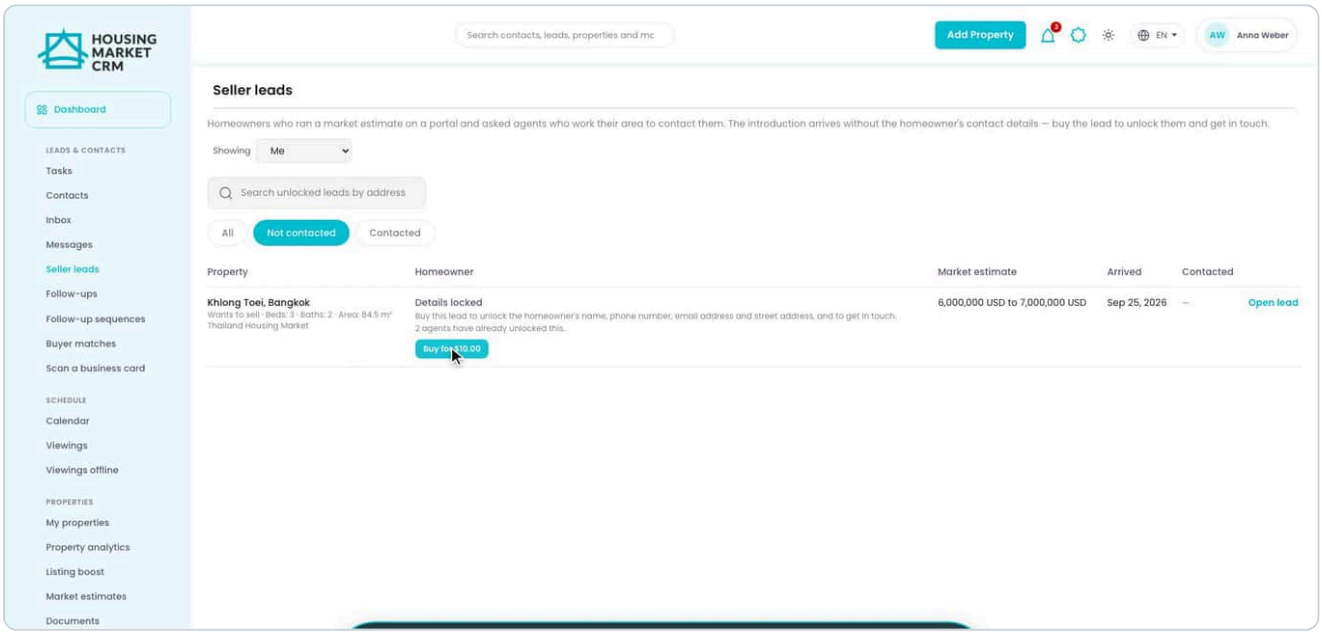


Figure 22.8 · Screen recorded 8 October 2026

RELATED HELP CENTER ARTICLES

What is a market estimate report?	faq.housingmarketgroup.com/faq/what-is-a-market-estimate-report

23 CHAPTER 23

Add a contact

All plans | For agents | Watch the video

OVERVIEW

Yes. Every buyer, seller, landlord, tenant or owner gets a record that holds several phone numbers and addresses, its history, and its outstanding follow-ups.

Each person gets one record, holding:

- Several phone numbers and postal addresses, because real buyers have them
- Email addresses, and the messaging handles they gave you
- The property enquiries they have made
- Notes and the dated activity trail
- Outstanding follow-ups

Any agent on the account can edit a contact's details, which is what keeps records current. Deleting one takes a manager with the right to delete, and that refusal is enforced on the server rather than by hiding the button.

From the Help Center: **Can I manage all my contacts?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

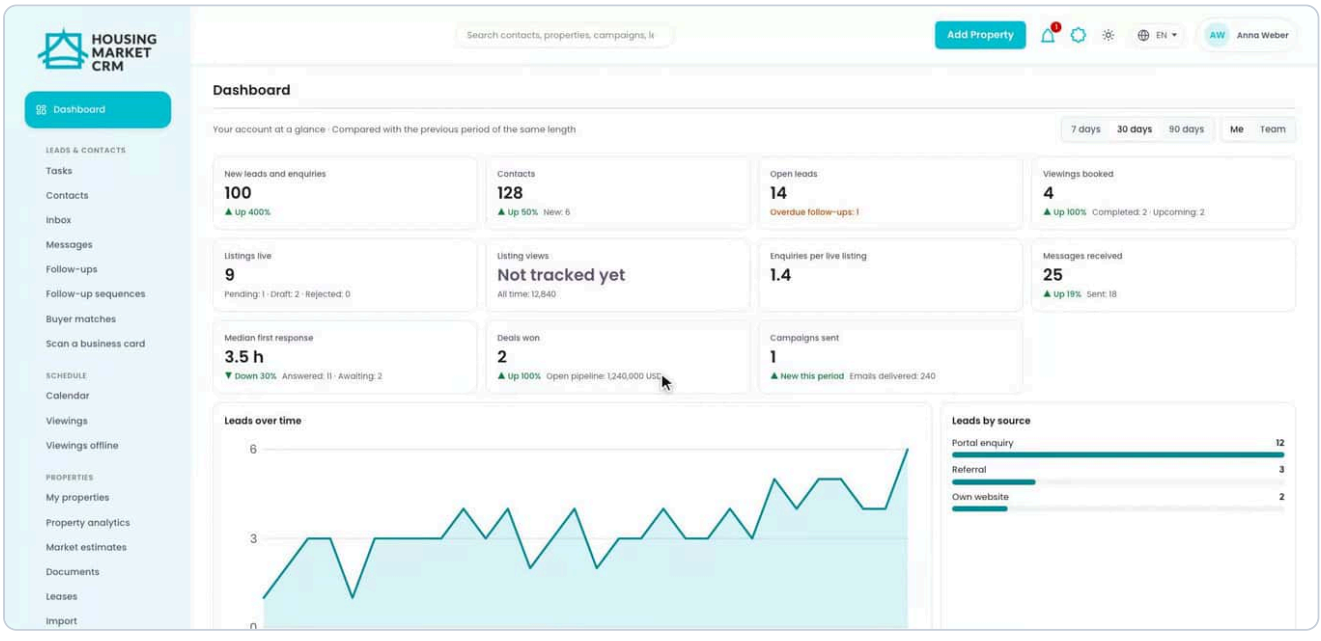


Figure 23.1 · Screen recorded 17 September 2026

2 Click **Contacts** in the left menu.

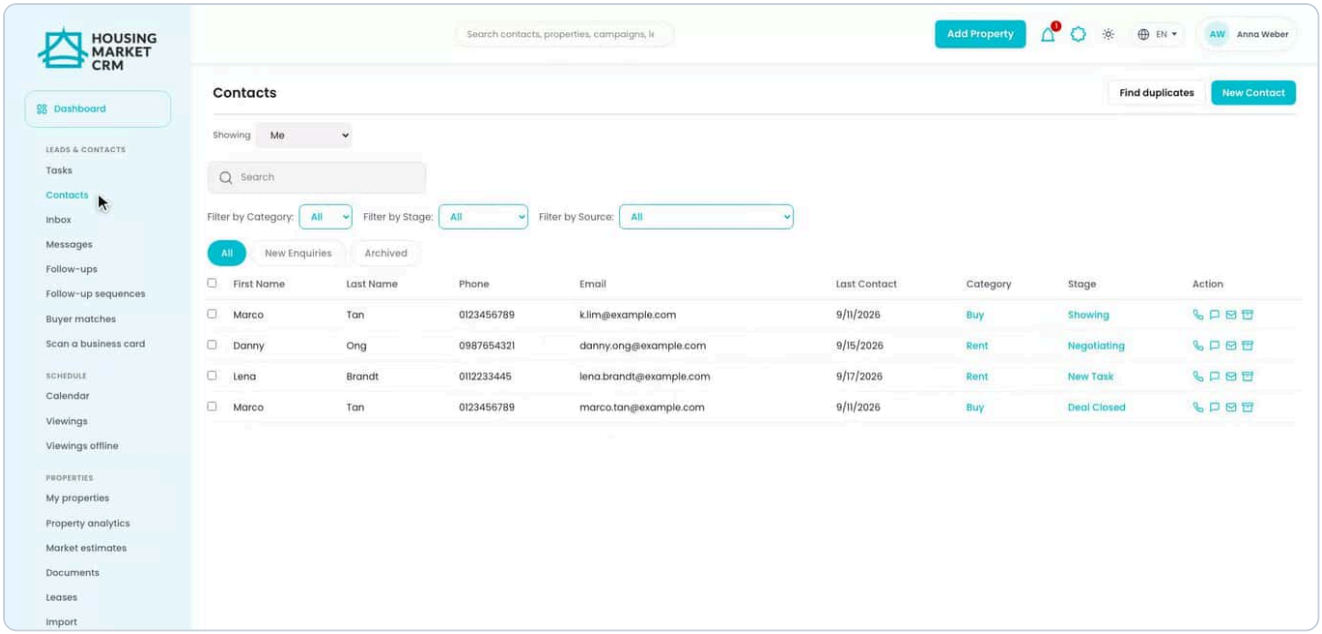


Figure 23.2 · Screen recorded 17 September 2026

3 Click **New Contact**.

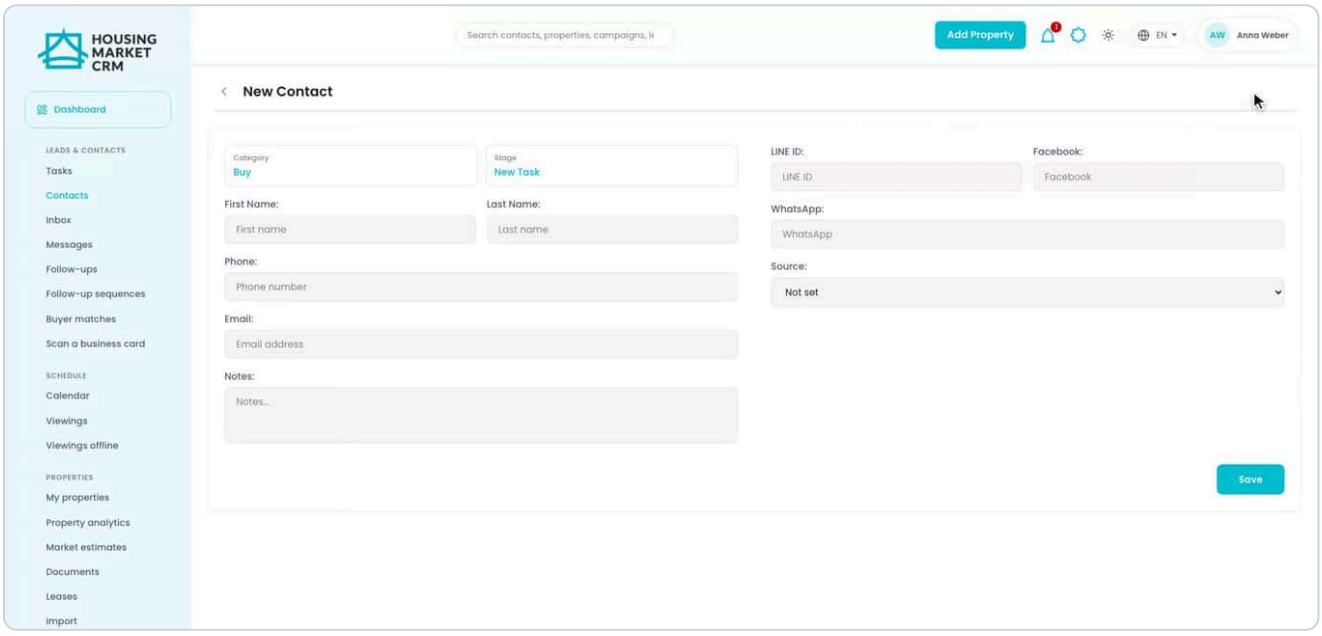


Figure 23.3 · Screen recorded 17 September 2026

4 Choose the **category** — for example **Buy** or **Rent**.

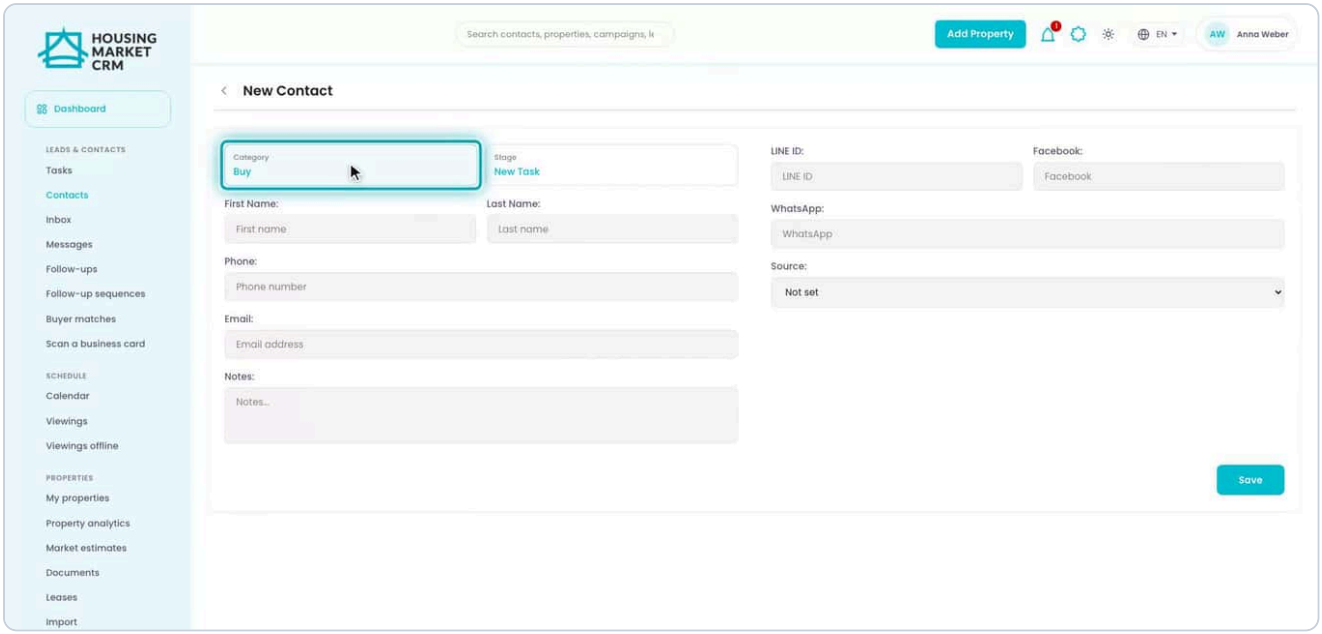


Figure 23.4 · Screen recorded 17 September 2026

5 And the **pipeline stage**.

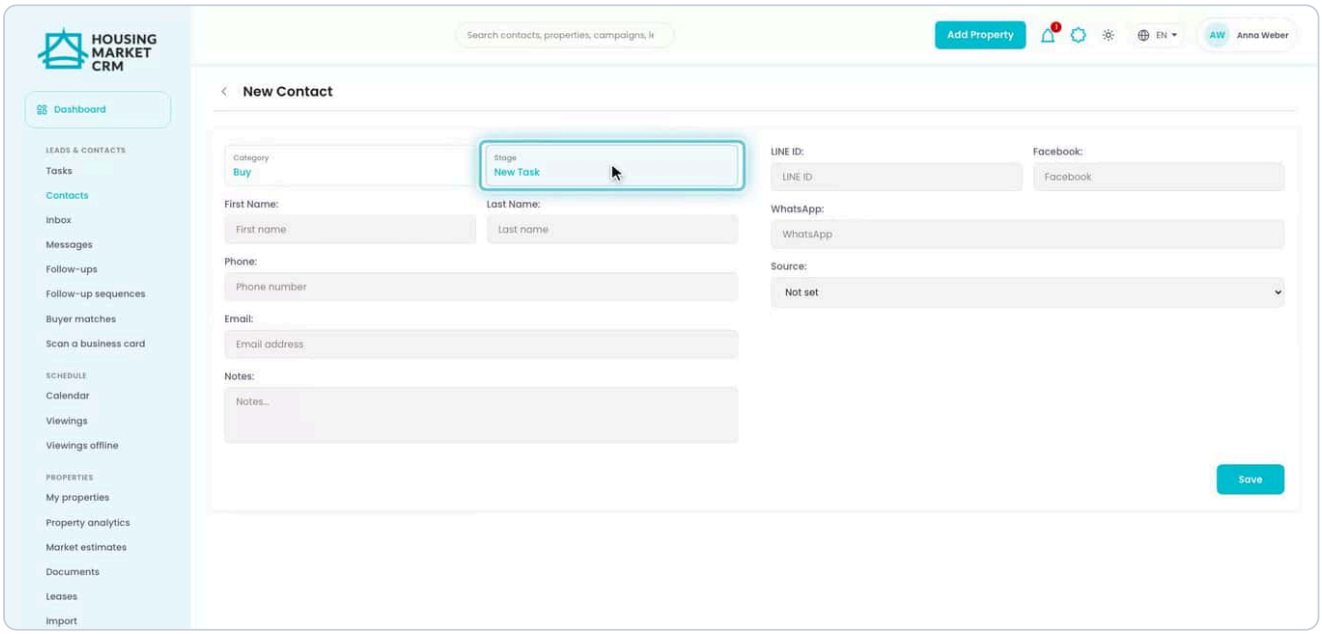


Figure 23.5 · Screen recorded 17 September 2026

6 Enter **first** and **last name**.

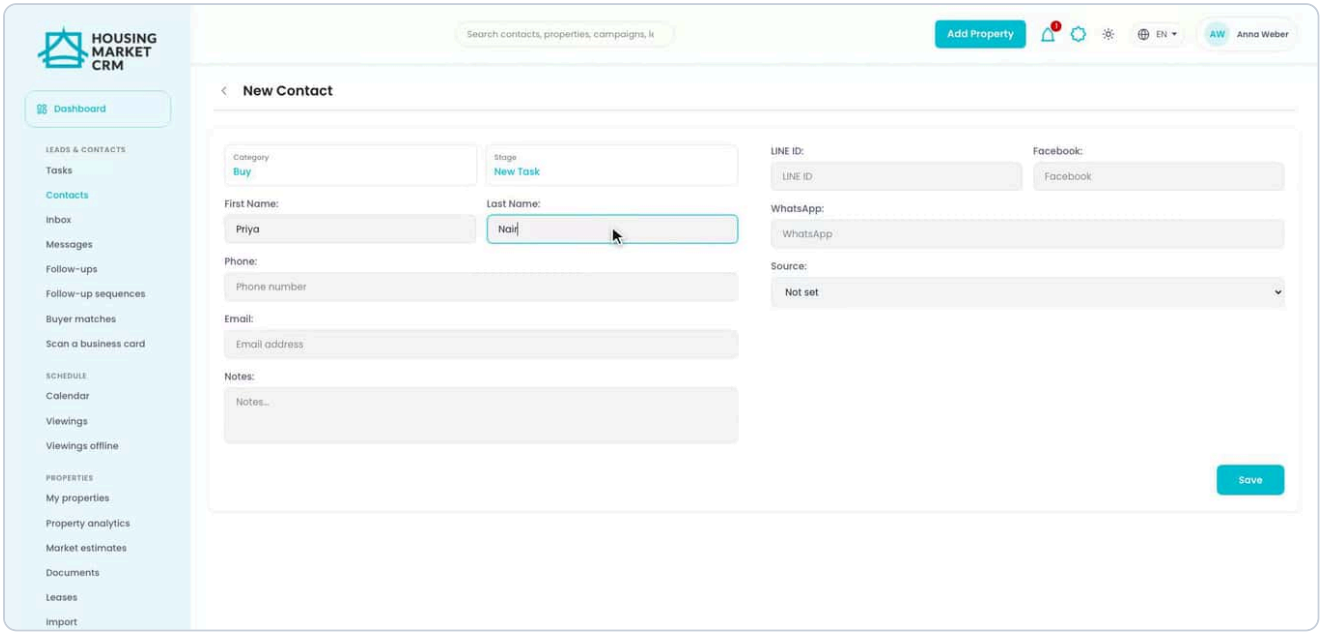


Figure 23.6 · Screen recorded 17 September 2026

7 Add a **phone number** and an **email address**.

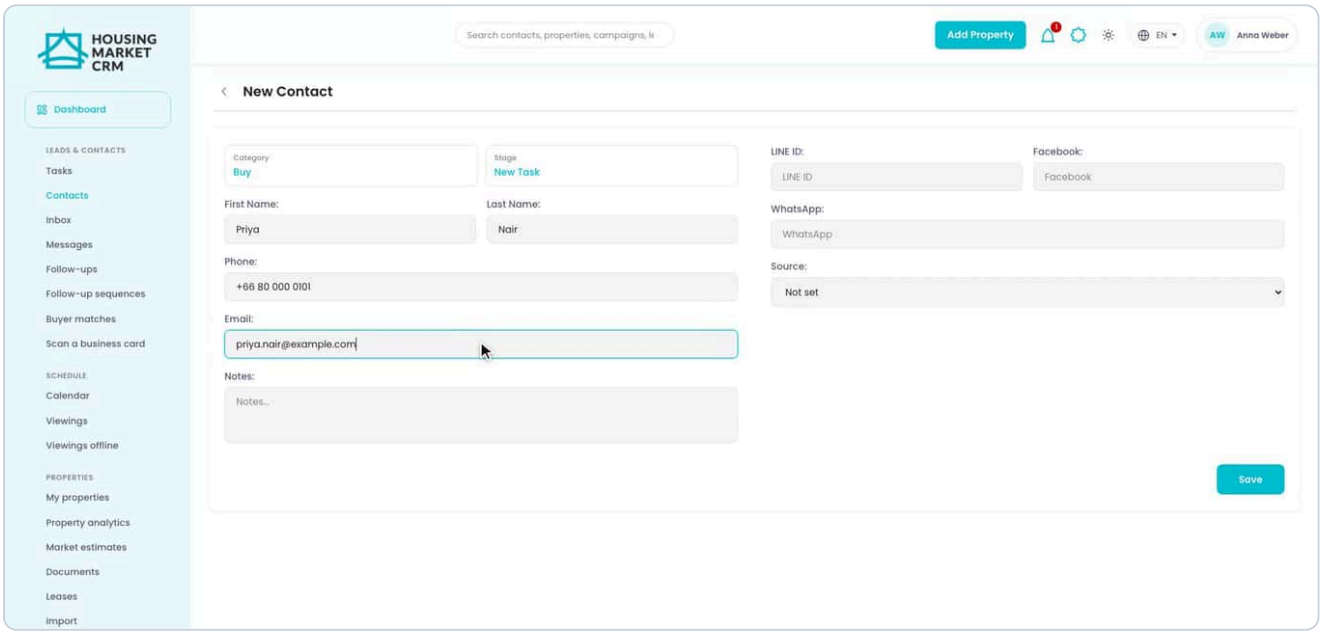


Figure 23.7 · Screen recorded 17 September 2026

8 Write a short **note**.

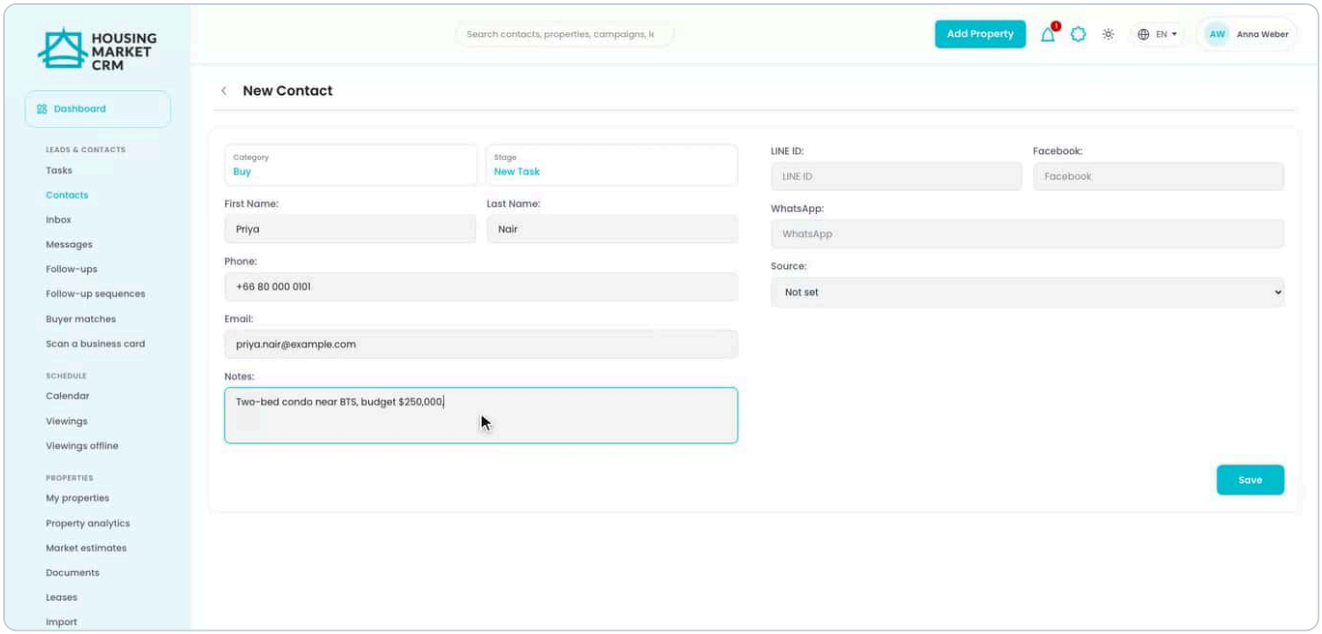


Figure 23.8 · Screen recorded 17 September 2026

9 Add **LINE**, **Facebook** or **WhatsApp** if they use them.

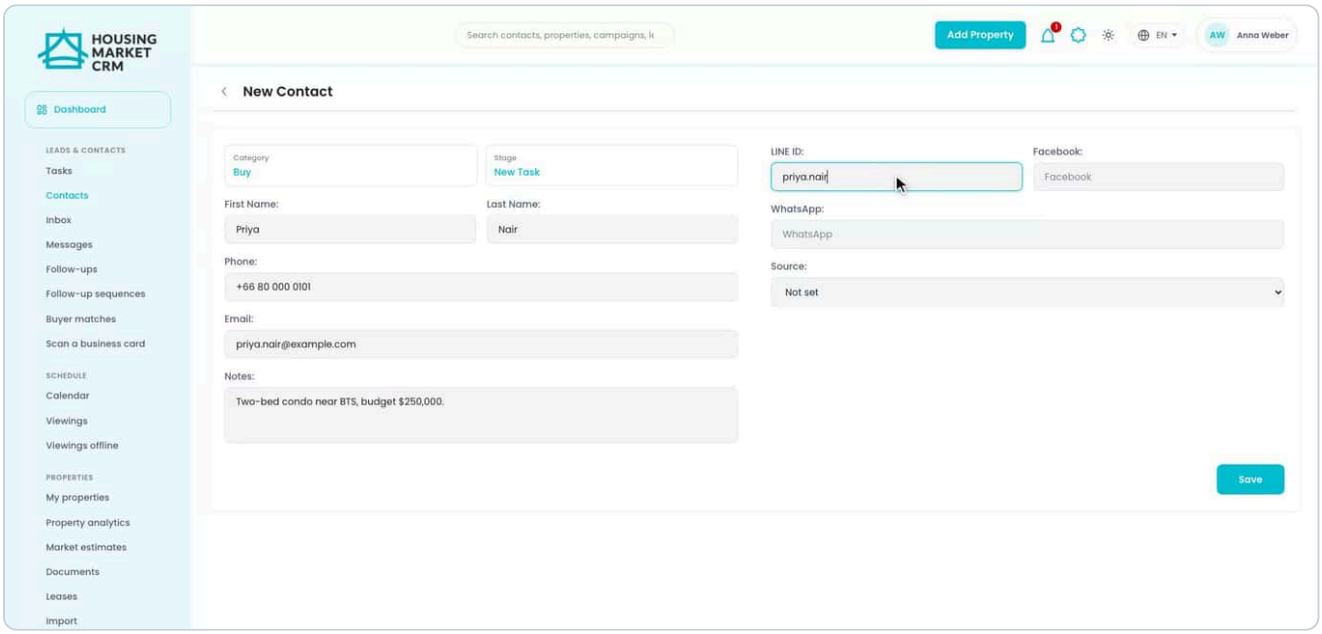


Figure 23.9 · Screen recorded 17 September 2026

10 Record the **source**.

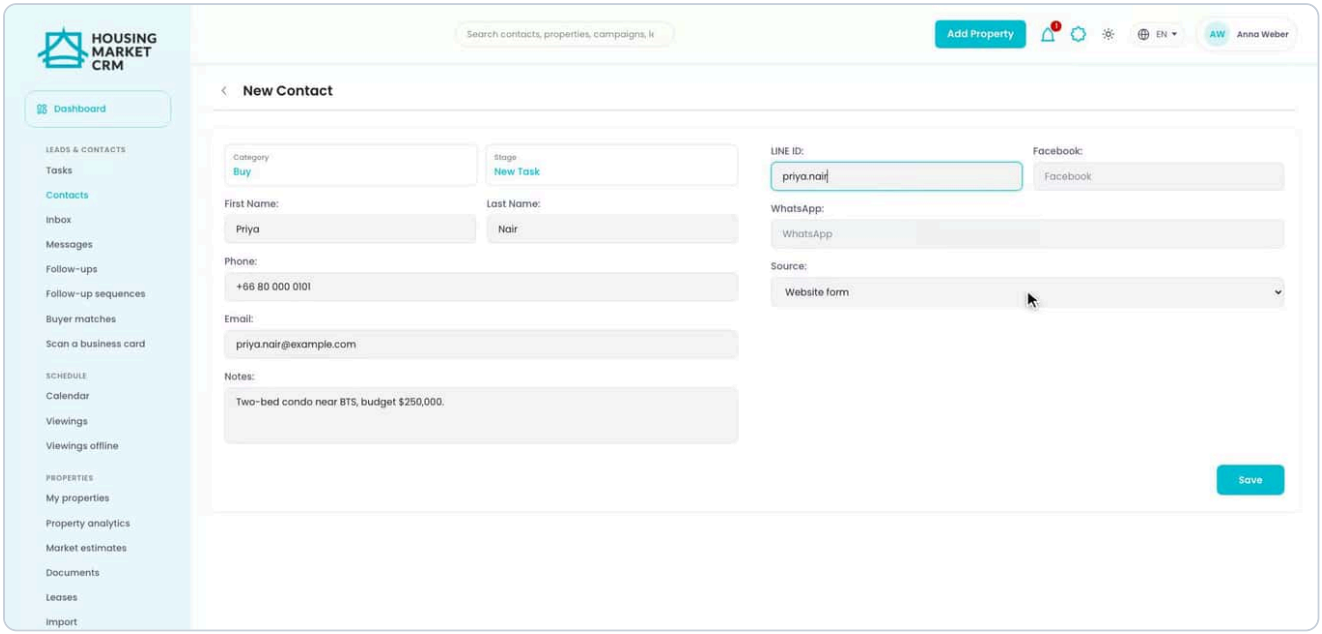


Figure 23.10 · Screen recorded 17 September 2026

11 Click **Save**.

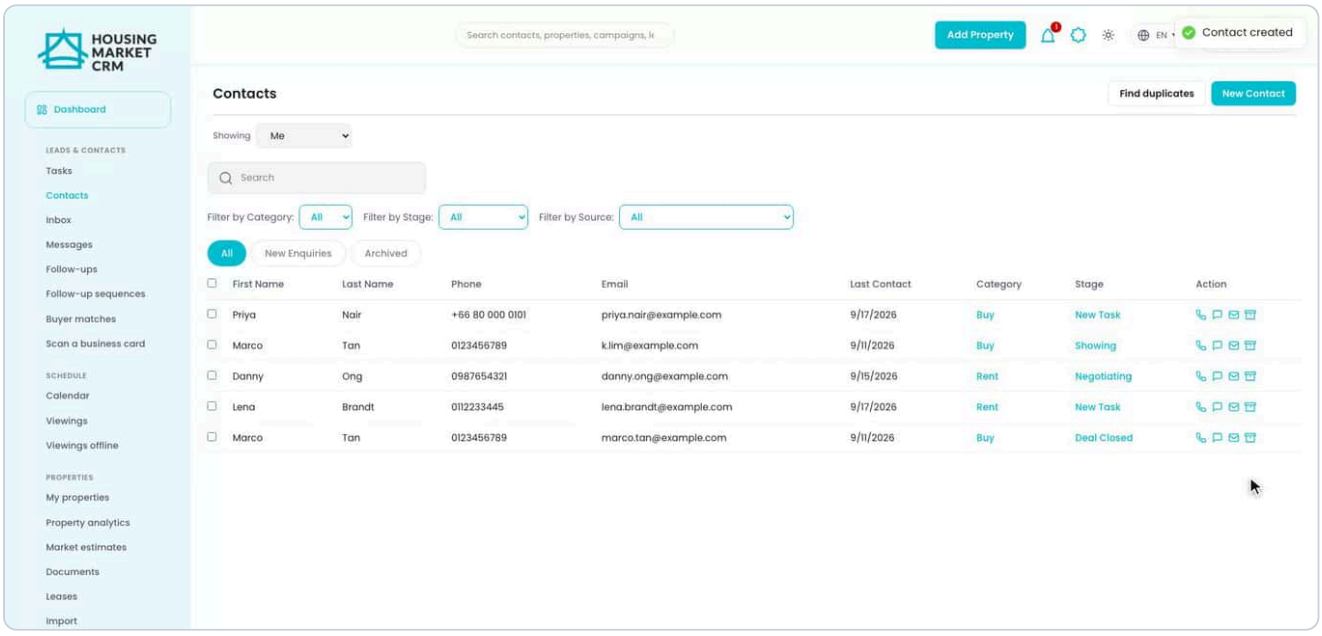


Figure 23.11 · Screen recorded 17 September 2026

12 The contact is added to your **Contacts** list.

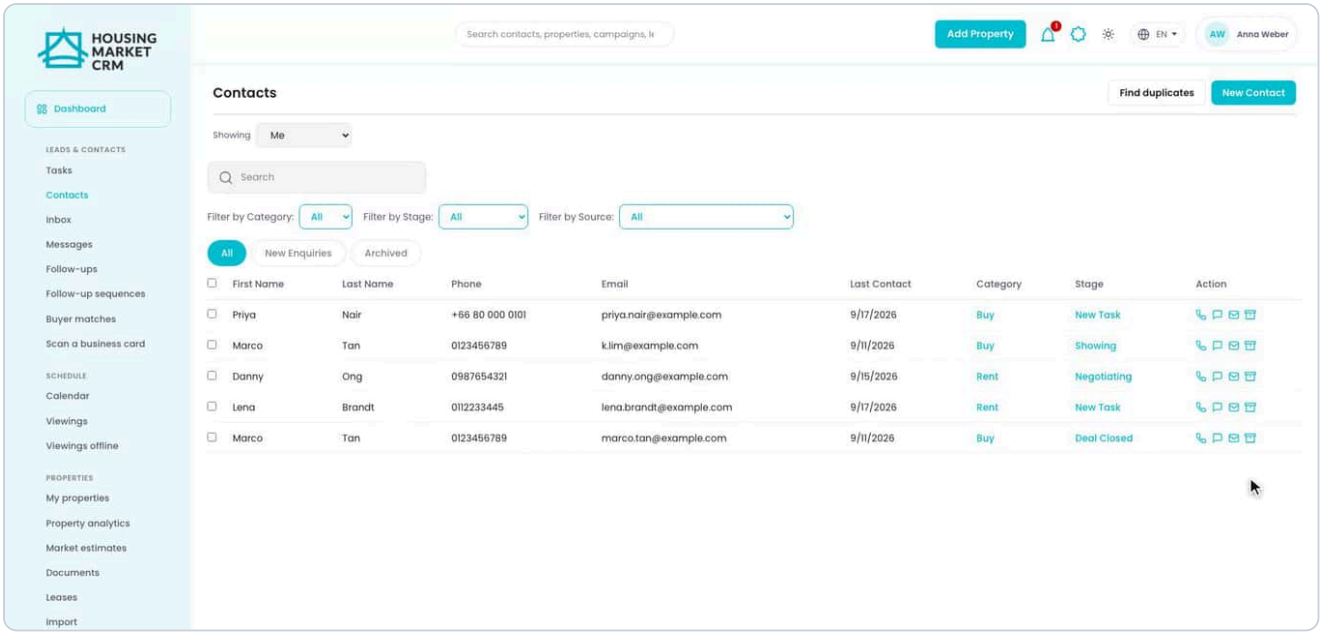


Figure 23.12 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

Can I merge duplicate contacts?	faq.housingmarketgroup.com/faq/can-i-merge-duplicate-contacts
Can I scan a business card into the CRM?	faq.housingmarketgroup.com/faq/can-i-scan-a-business-card

24 CHAPTER 24

Import contacts

All plans | For agents | Watch the video

TODO Plan: the Help Center says importing "is part of Business"; the video catalogue lists this task for all plans, so the chapter prints "All plans". Confirm the plan.

TODO The video says "up to 5,000 rows per file"; the Help Center gives no limit. Add the limit to the article or take it out of the caption.

OVERVIEW

Yes, free on every plan. Import contacts, leads and deals from a HubSpot, Salesforce, Zoho or Pipedrive export, or from any CSV or Excel file, with a dry run before anything is written.

In the sidebar, under Properties, open Import and walk through four steps: Choose a file, Match columns, Dry run and Result. It is free on every plan, up to 5,000 rows per file; split a bigger file into parts.

- Choose a file and say whether it holds contacts, leads or deals. CSV, TSV and Excel files are accepted; save an older .xls file as .xlsx or CSV first.
- Confirm the column mapping. Exports from HubSpot, Salesforce, Zoho and Pipedrive are recognised by their column names and mapped for you, and anything the tool is unsure of is suggested rather than applied silently.
- Run a dry run. It performs every check the import will, duplicates included, and writes nothing.
- Import, and read the result row by row.

Importing never sends an email or a notification to anyone — neither to the people in the file nor to the agents they are assigned to. A contact that matches one you already have by email, or by phone and name, is skipped unless you choose to import duplicates, and nothing is ever merged automatically.

This moves your client book. Moving a portfolio of property listings in from a CSV file or an XML feed file is free too — see "How do I import properties from a file?".

From the Help Center: **Can I import from another CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

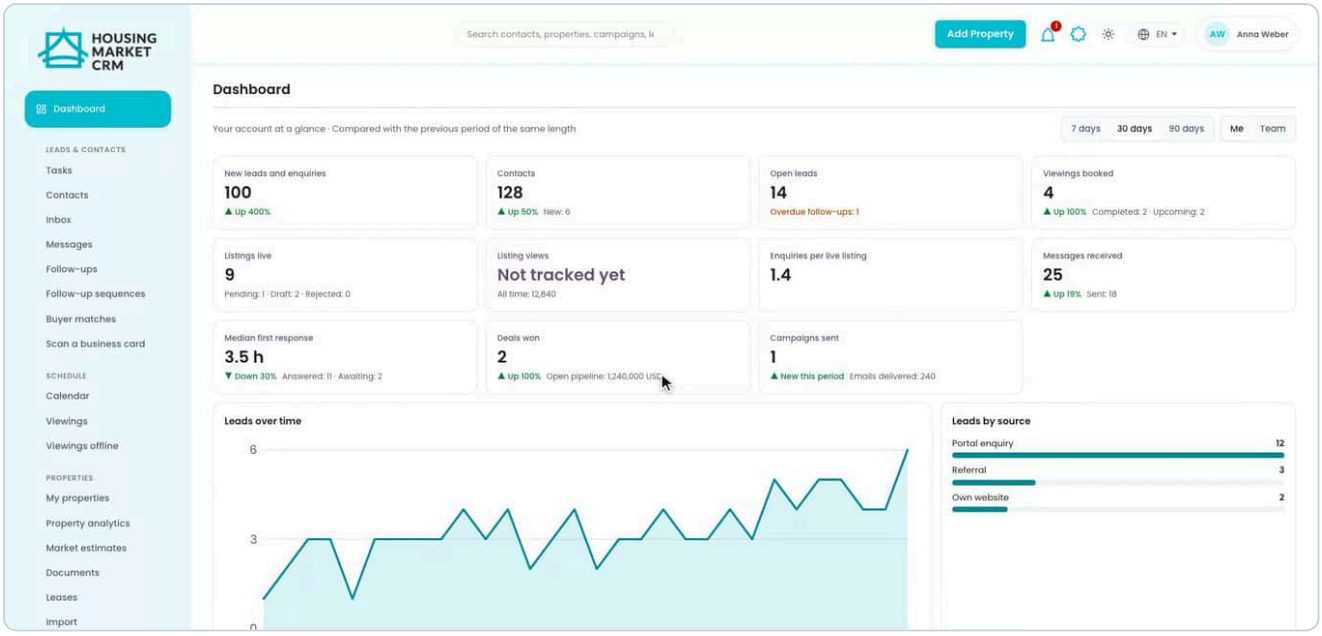


Figure 24.1 · Screen recorded 17 September 2026

2 Click **Import** in the left menu.

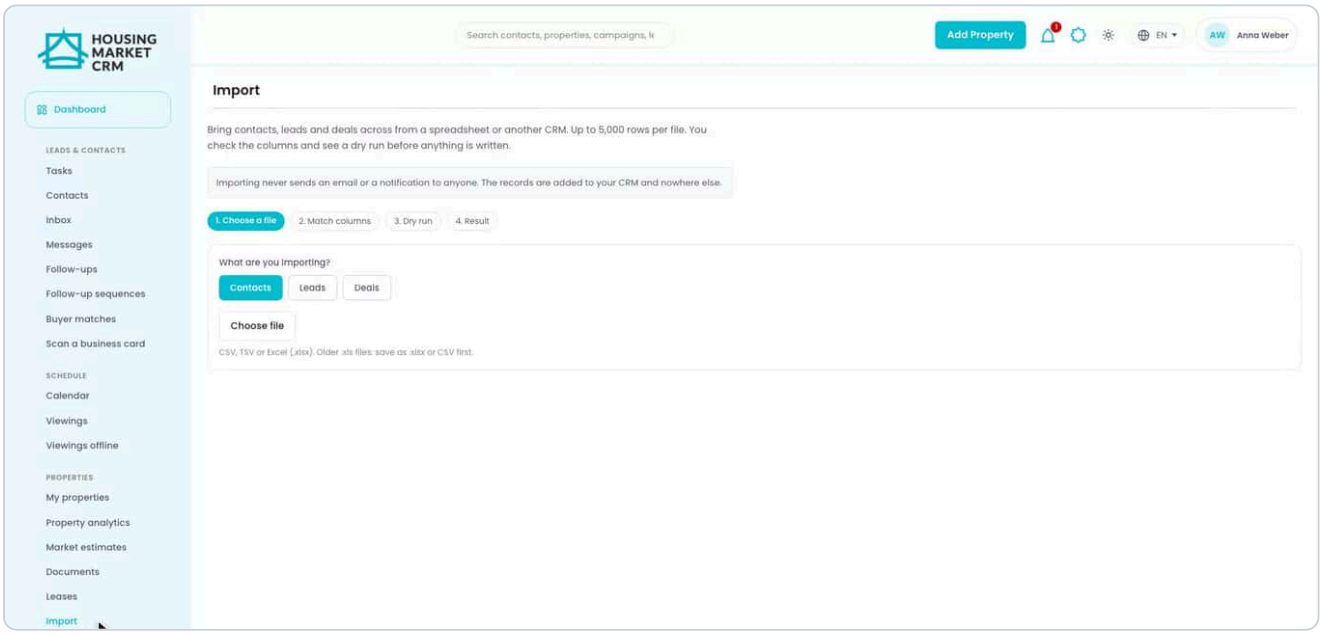


Figure 24.2 · Screen recorded 17 September 2026

3 Bring in up to **5,000 rows** per file — nobody is emailed.

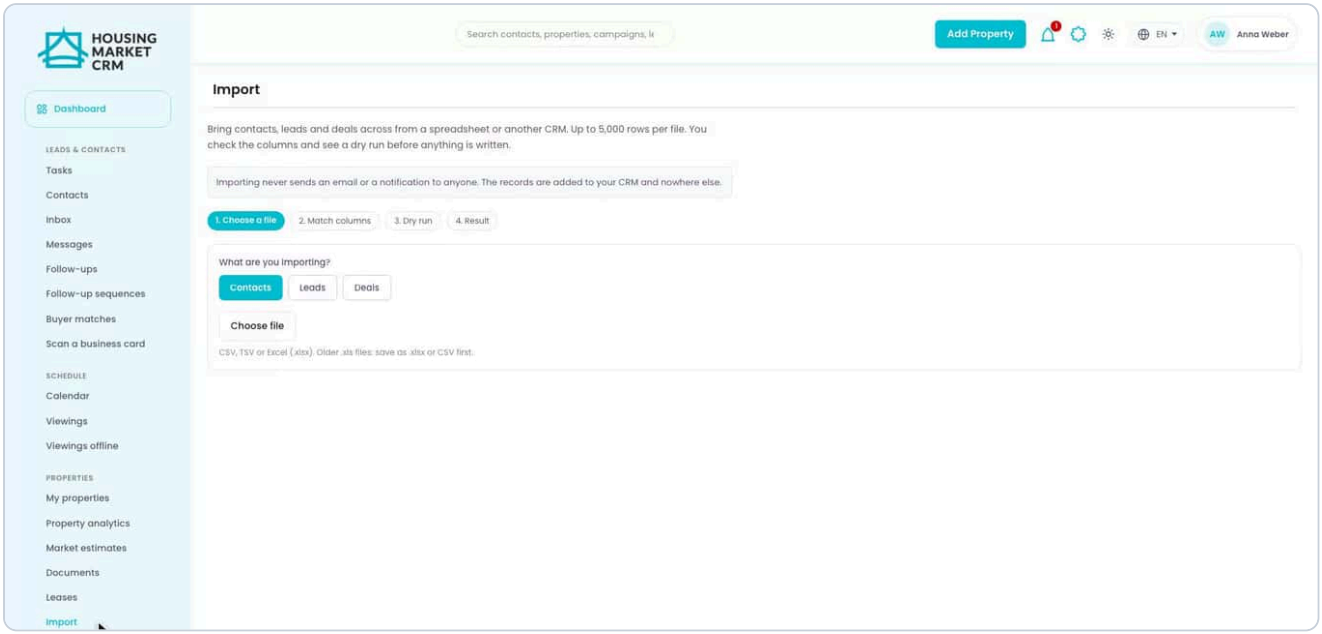


Figure 24.3 · Screen recorded 17 September 2026

4 Choose **Contacts**.

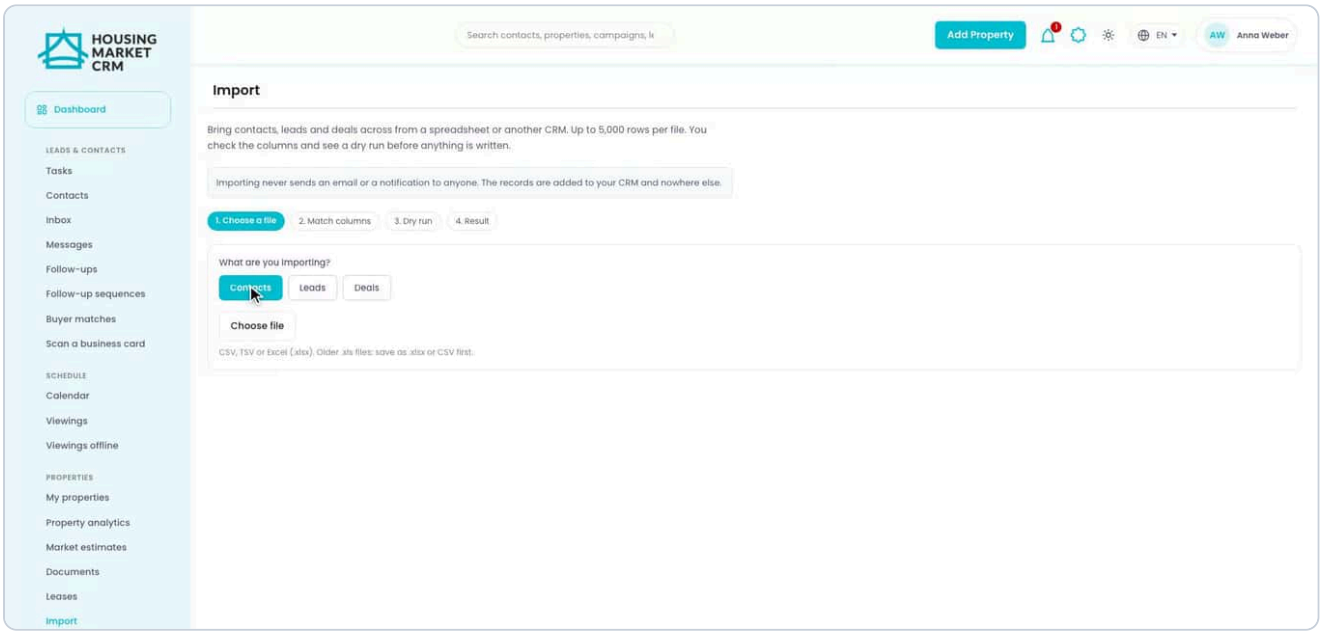


Figure 24.4 · Screen recorded 17 September 2026

5 Click **Choose file** and pick a CSV, TSV or Excel file.

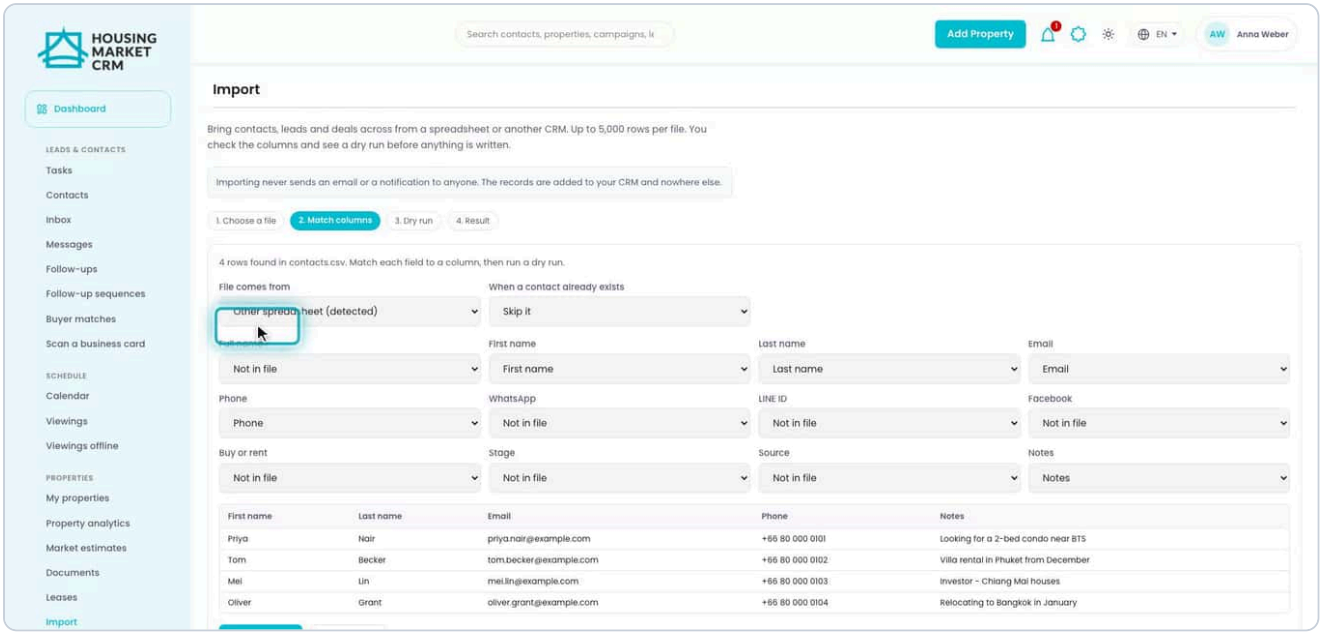


Figure 24.5 · Screen recorded 17 September 2026

6 Check that each **column** is matched to the right field.

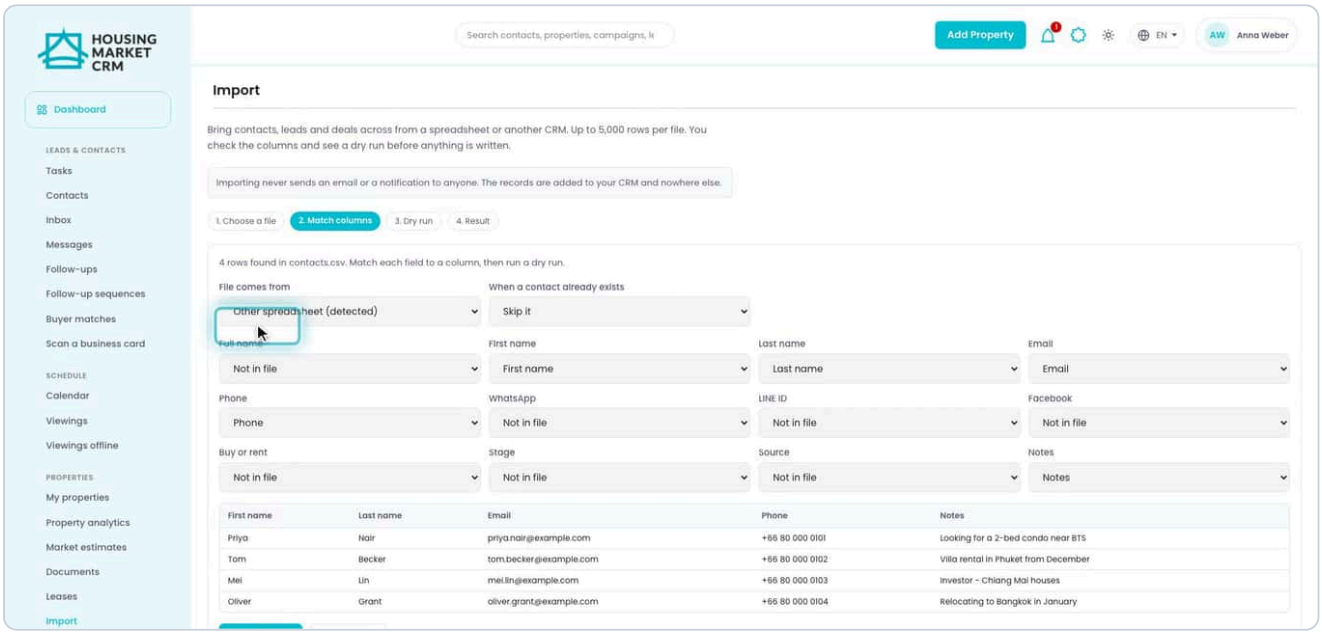


Figure 24.6 · Screen recorded 17 September 2026

7 Run a **dry run** to preview the result.

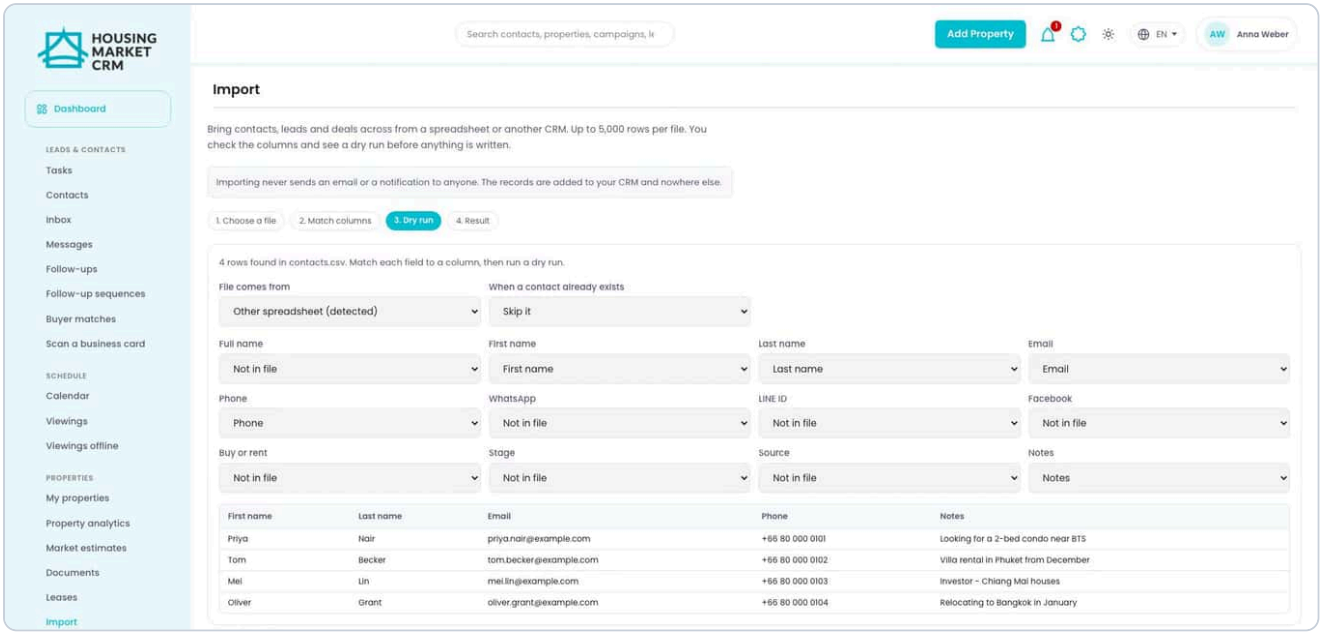


Figure 24.7 · Screen recorded 17 September 2026

8 Then start the **import**.

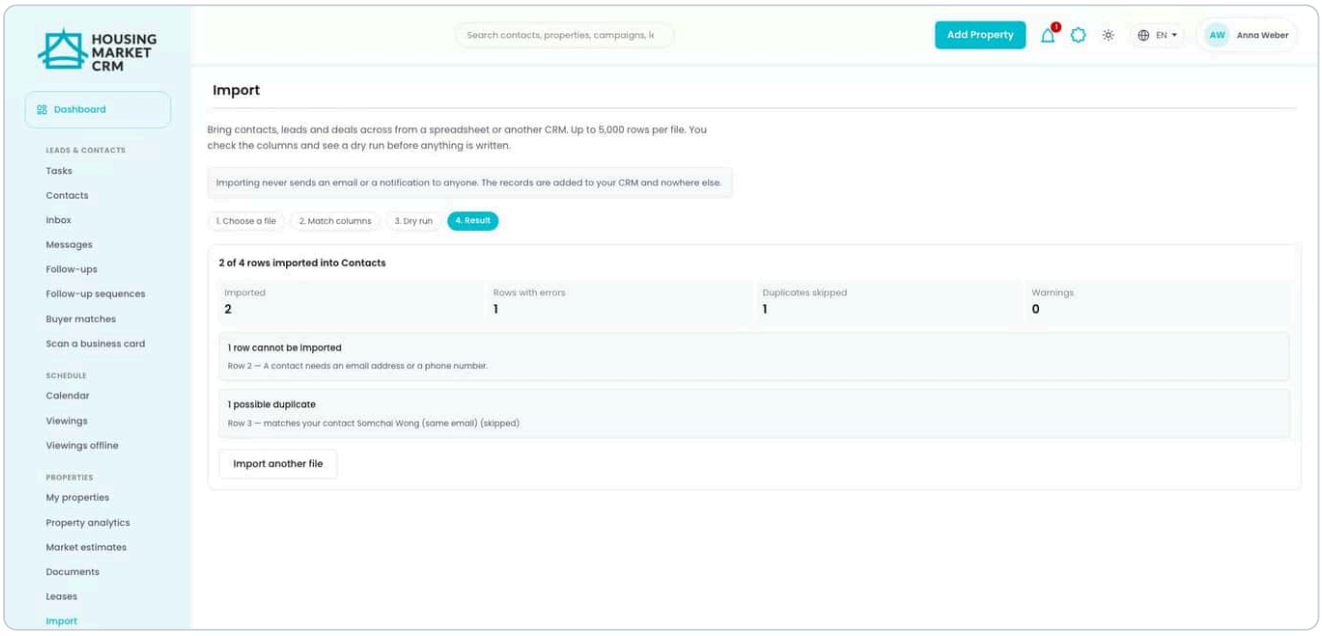


Figure 24.8 · Screen recorded 17 September 2026

9 Your contacts are now in the CRM.

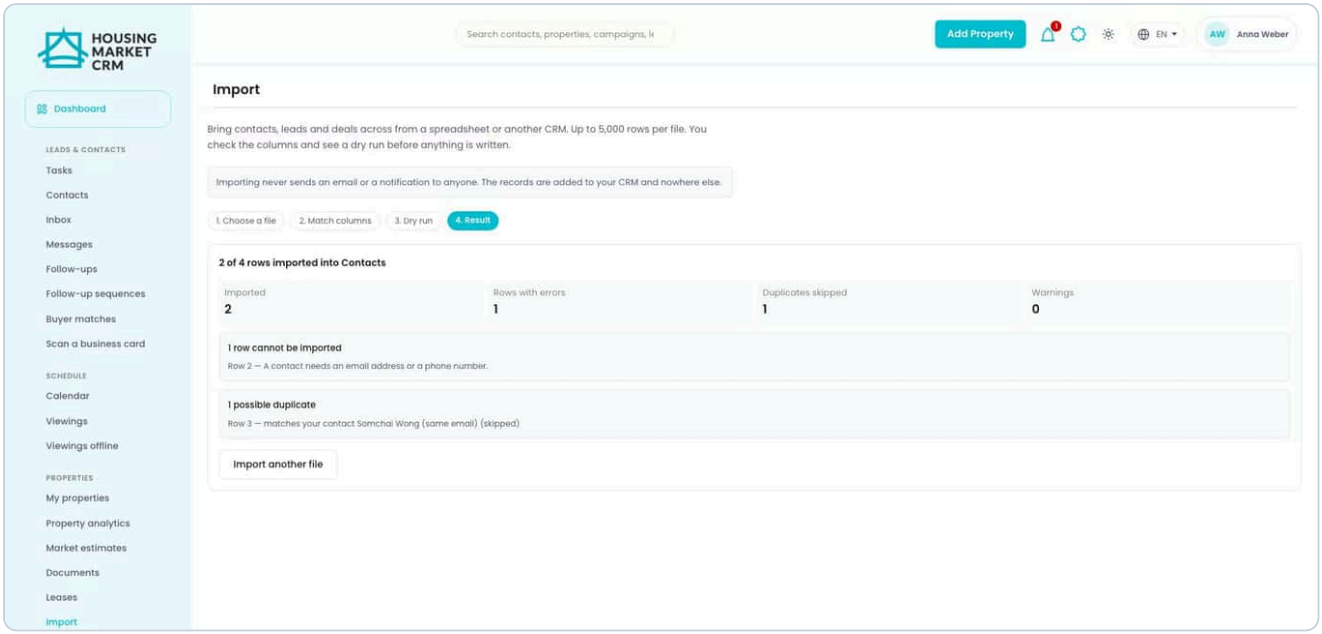


Figure 24.9 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

Can I merge duplicate contacts? faq.housingmarketgroup.com/faq/can-i-merge-duplicate-contacts

25 CHAPTER 25

Import leads and deals from a file

All plans | For agents | Watch the video

OVERVIEW

Yes, free on every plan. Import contacts, leads and deals from a HubSpot, Salesforce, Zoho or Pipedrive export, or from any CSV or Excel file, with a dry run before anything is written.

In the sidebar, under Properties, open Import and walk through four steps: Choose a file, Match columns, Dry run and Result. It is free on every plan, up to 5,000 rows per file; split a bigger file into parts.

- Choose a file and say whether it holds contacts, leads or deals. CSV, TSV and Excel files are accepted; save an older .xls file as .xlsx or CSV first.
- Confirm the column mapping. Exports from HubSpot, Salesforce, Zoho and Pipedrive are recognised by their column names and mapped for you, and anything the tool is unsure of is suggested rather than applied silently.
- Run a dry run. It performs every check the import will, duplicates included, and writes nothing.
- Import, and read the result row by row.

Importing never sends an email or a notification to anyone — neither to the people in the file nor to the agents they are assigned to. A contact that matches one you already have by email, or by phone and name, is skipped unless you choose to import duplicates, and nothing is ever merged automatically.

This moves your client book. Moving a portfolio of property listings in from a CSV file or an XML feed file is free too — see "How do I import properties from a file?".

From the Help Center: **Can I import from another CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

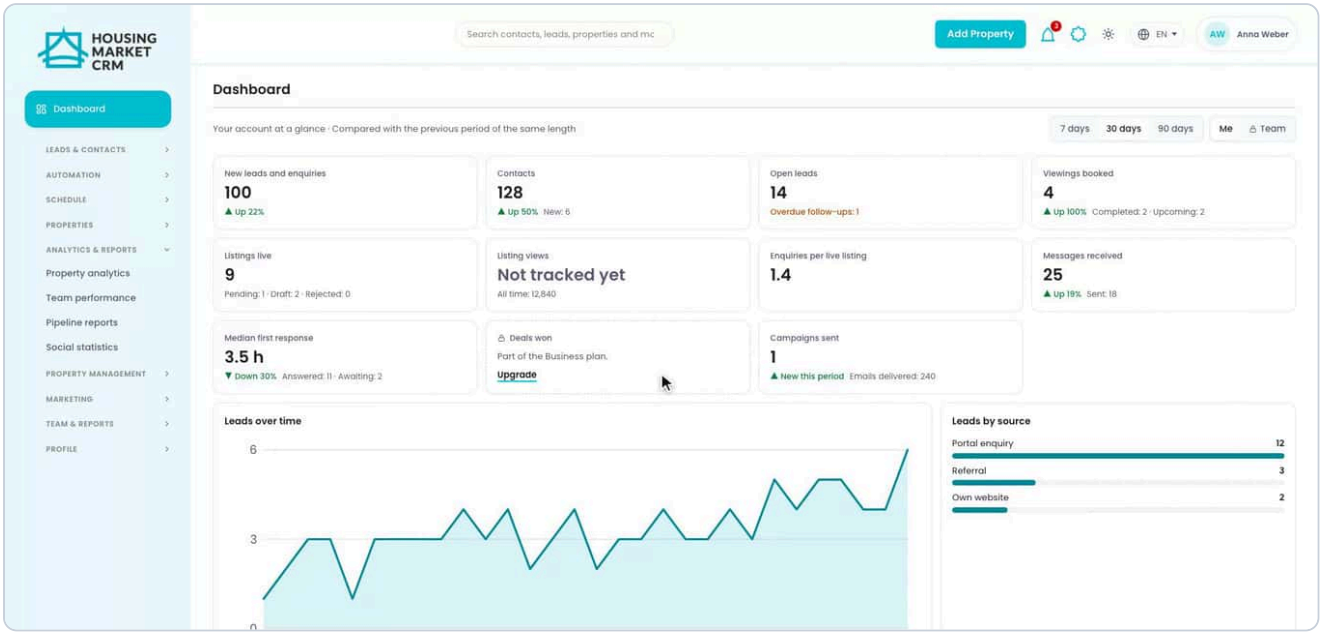


Figure 25.1 · Screen recorded 28 October 2026

2 Open **Properties** in the left menu.

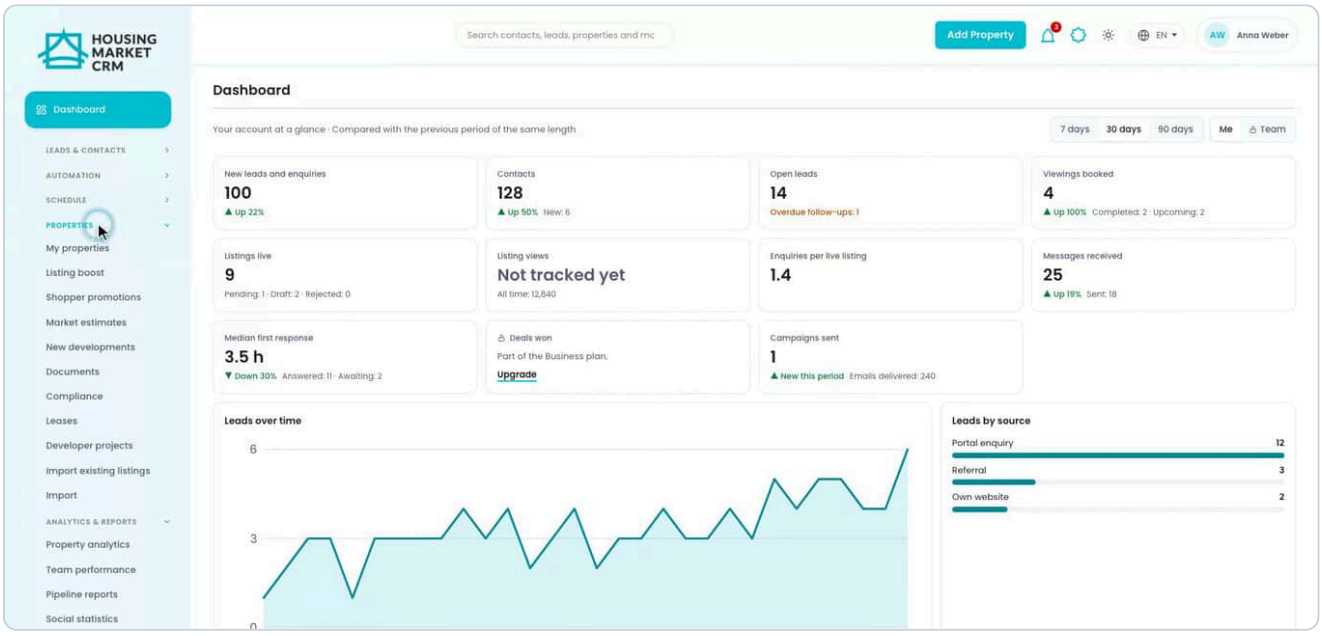


Figure 25.2 · Screen recorded 28 October 2026

3 Click **Import**.

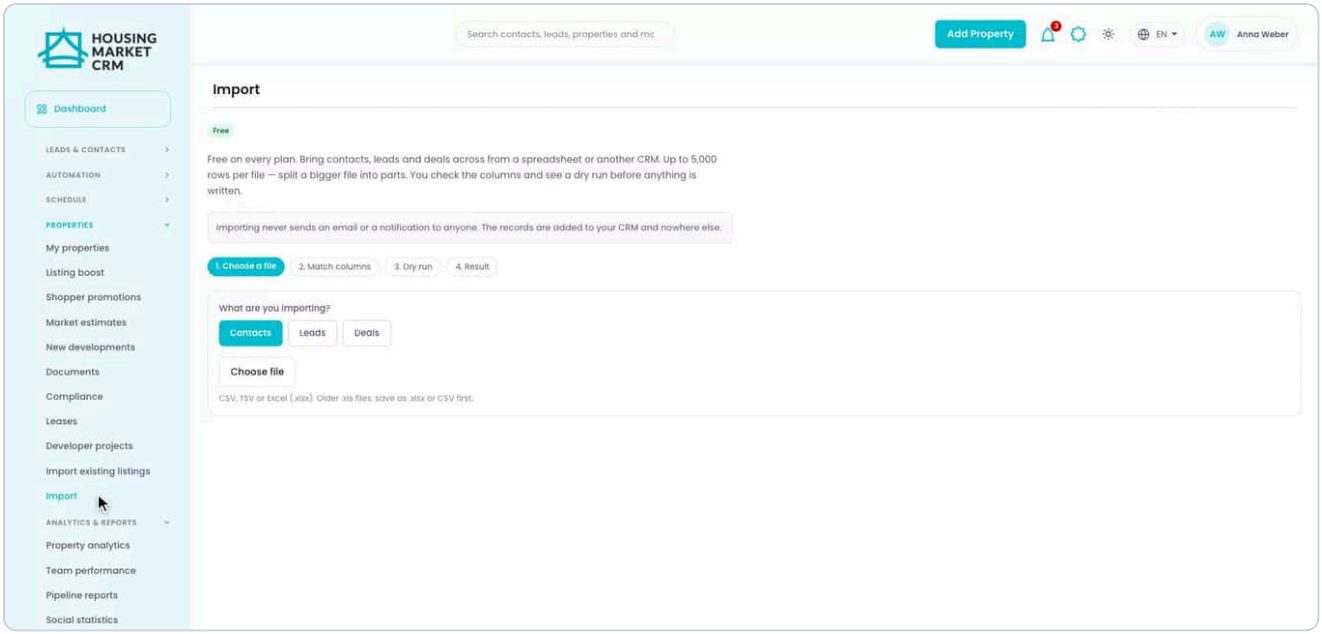


Figure 25.3 · Screen recorded 28 October 2026

4 File imports are **free on every plan**, up to **5,000 rows** per file.

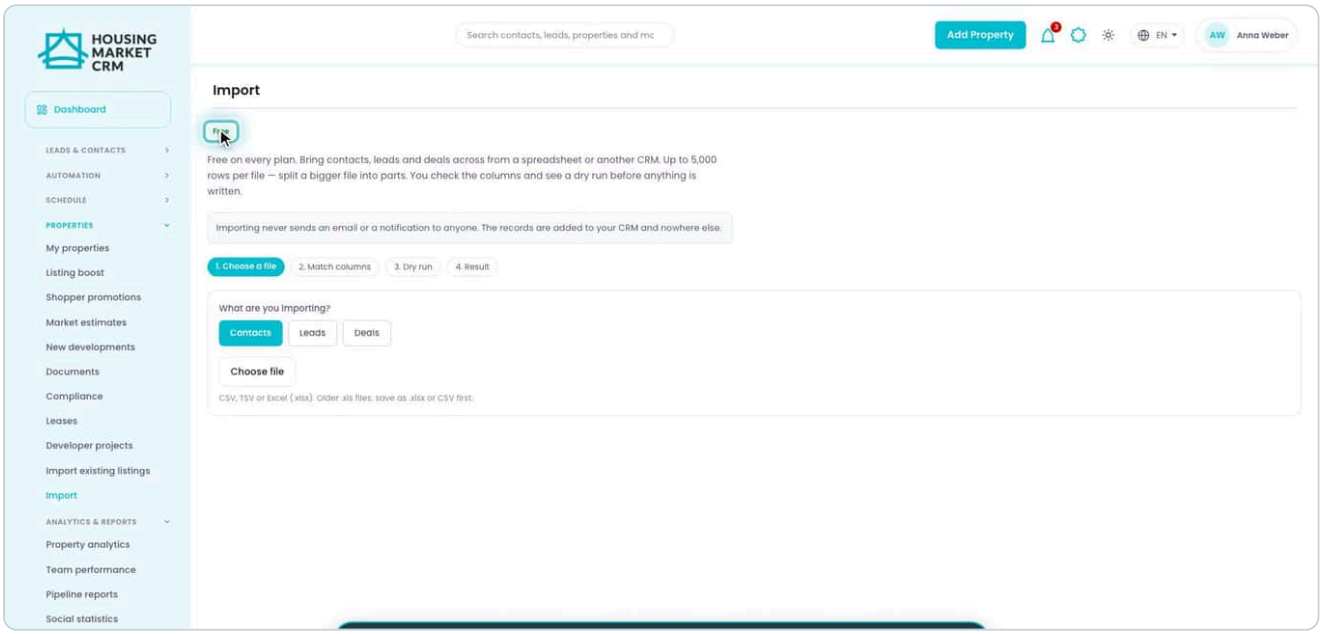


Figure 25.4 · Screen recorded 28 October 2026

5 Choose **Leads**.

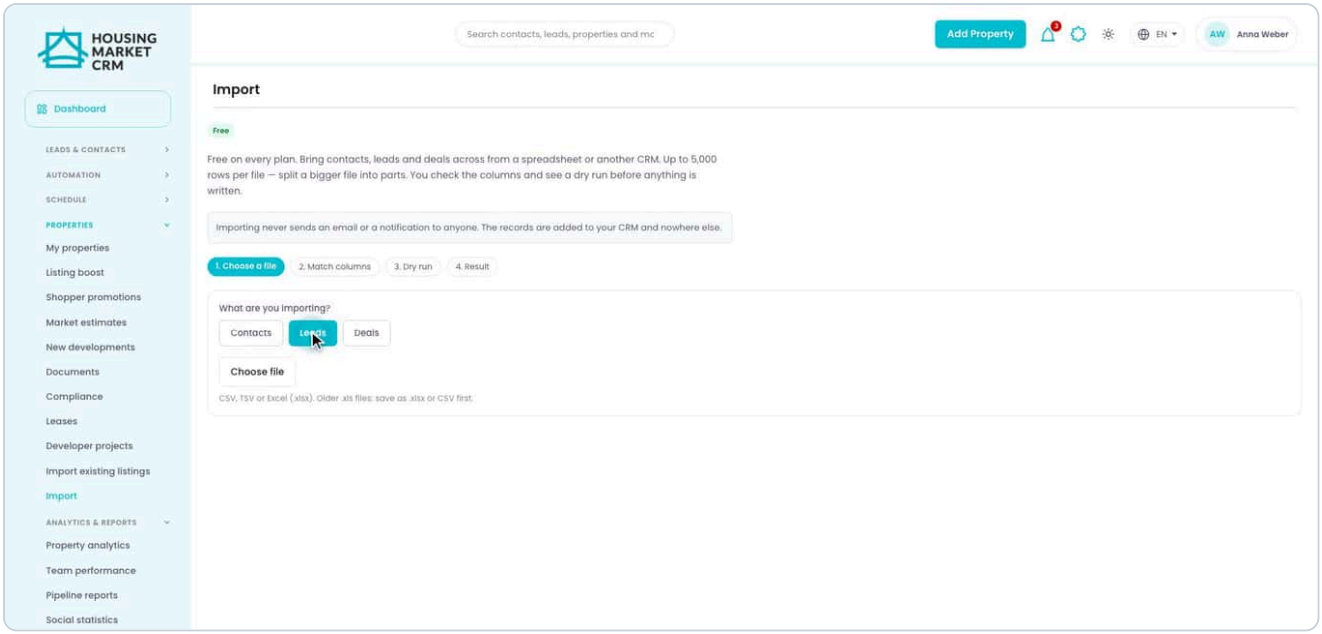


Figure 25.5 · Screen recorded 28 October 2026

6 Click **Choose file** and pick your CSV or Excel file.

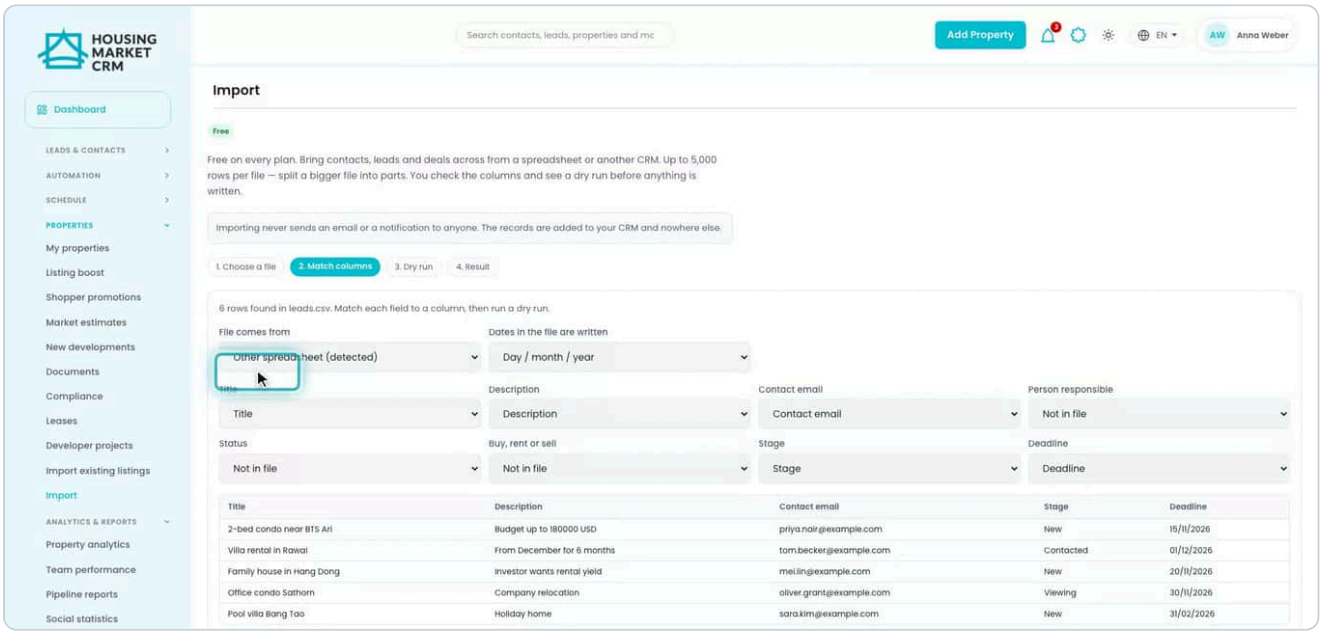


Figure 25.6 · Screen recorded 28 October 2026

7 Each field is matched to a **column** of your file. Check them.

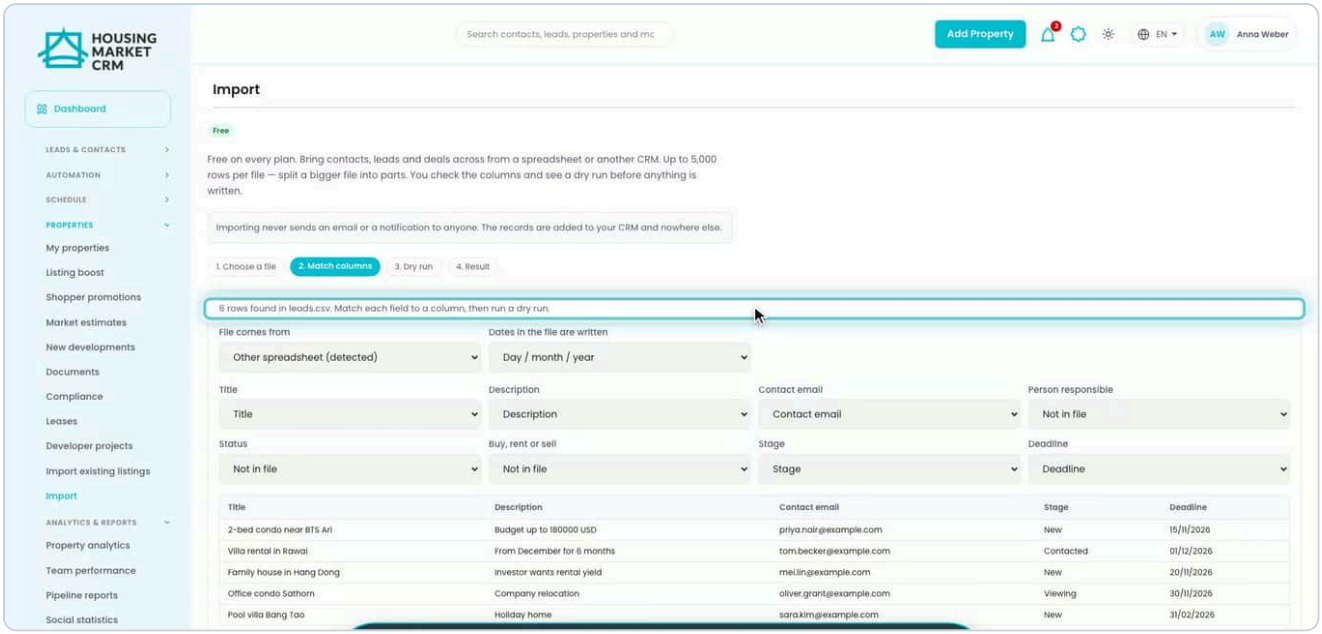


Figure 25.7 · Screen recorded 28 October 2026

8 Say how **dates** are written in your file.

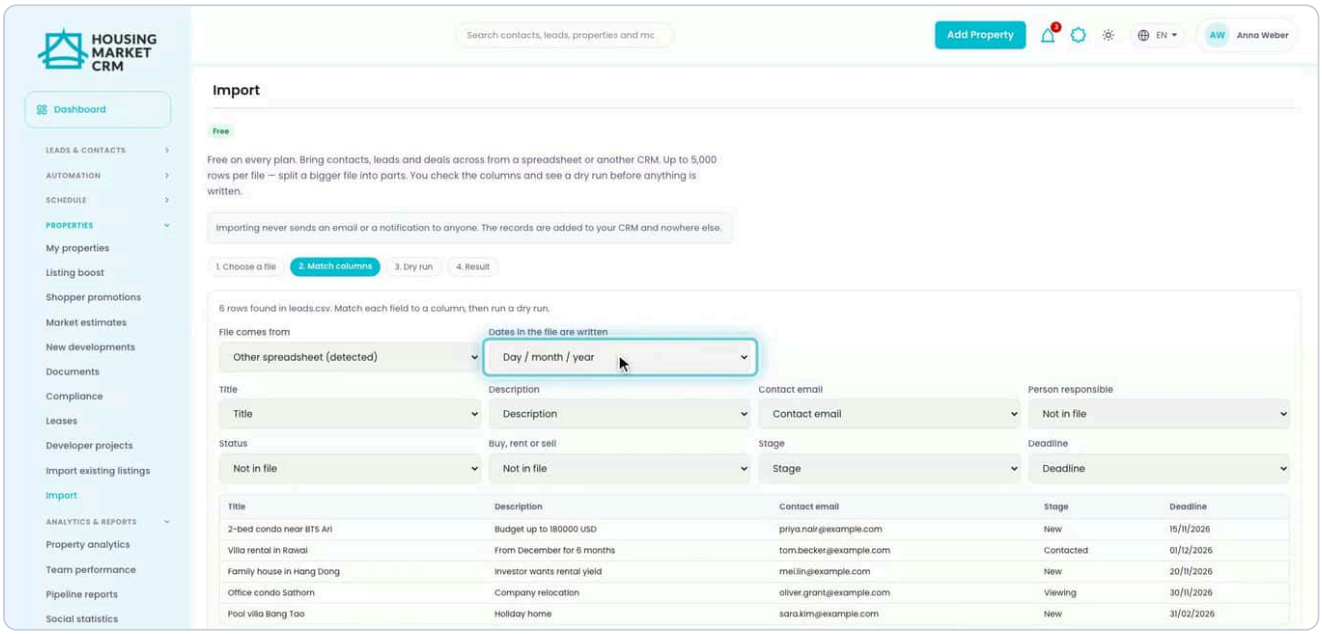


Figure 25.8 · Screen recorded 28 October 2026

9 Click **Run dry run**. Nothing is written yet.

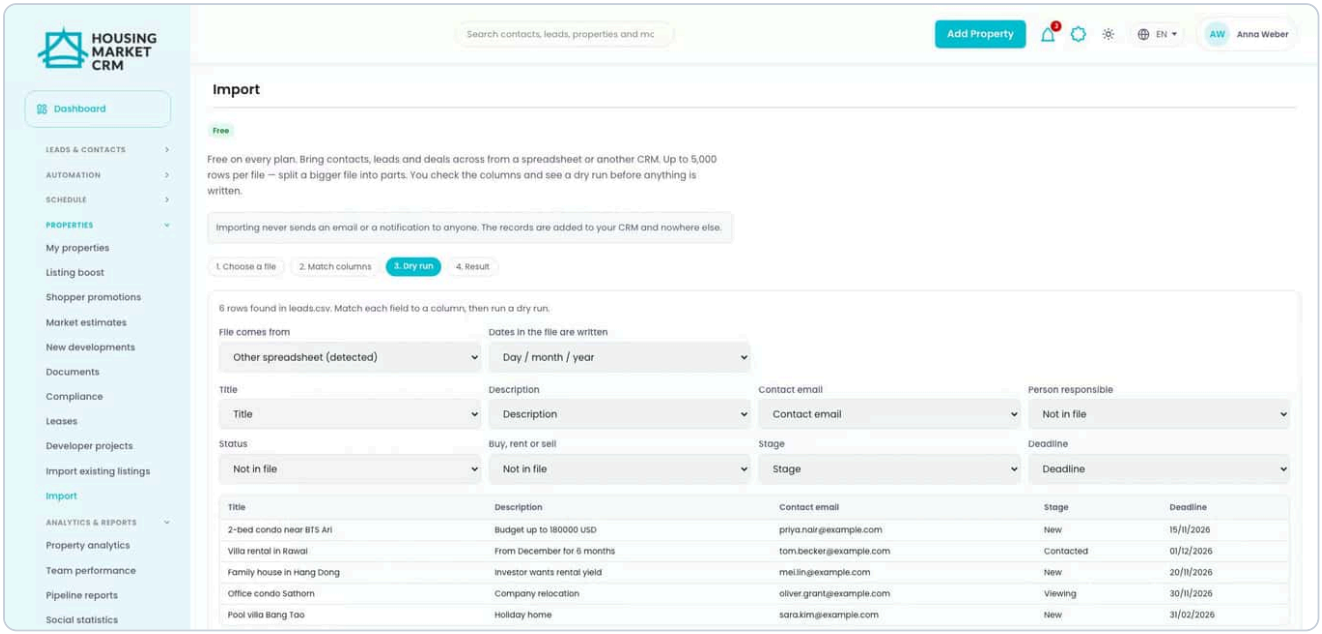


Figure 25.9 · Screen recorded 28 October 2026

10 The dry run shows the rows with **errors**, like an impossible date.

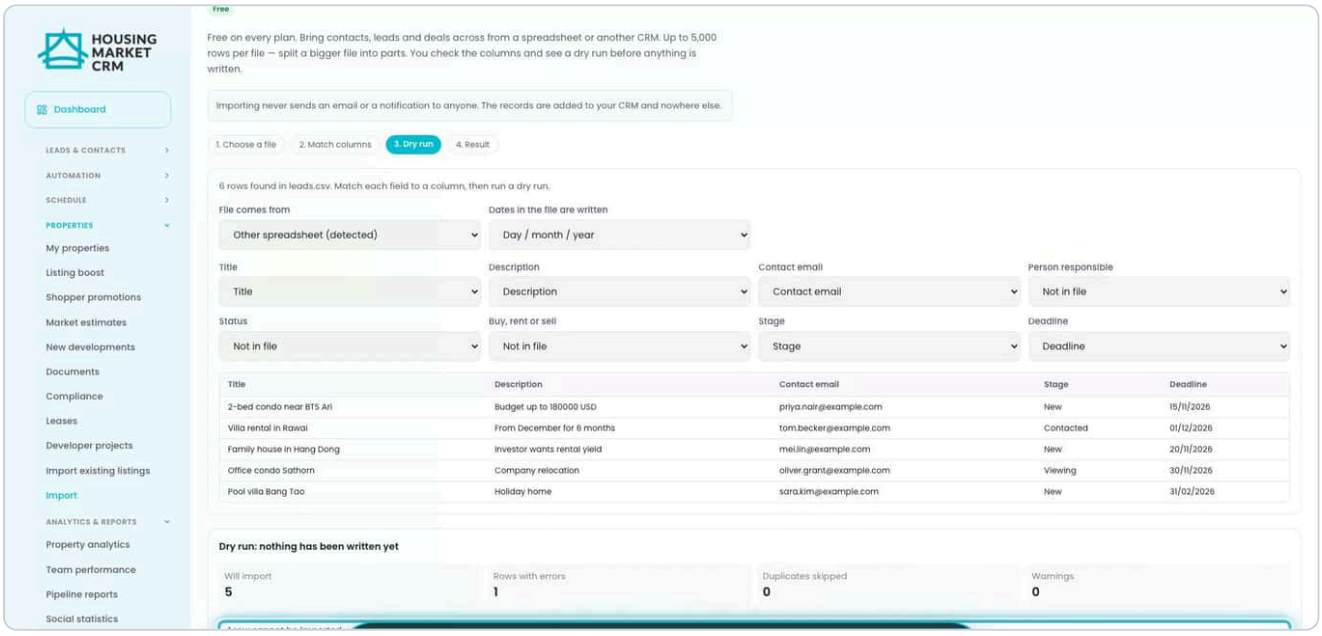


Figure 25.10 · Screen recorded 28 October 2026

11 Click **Import 5 rows into Leads.**

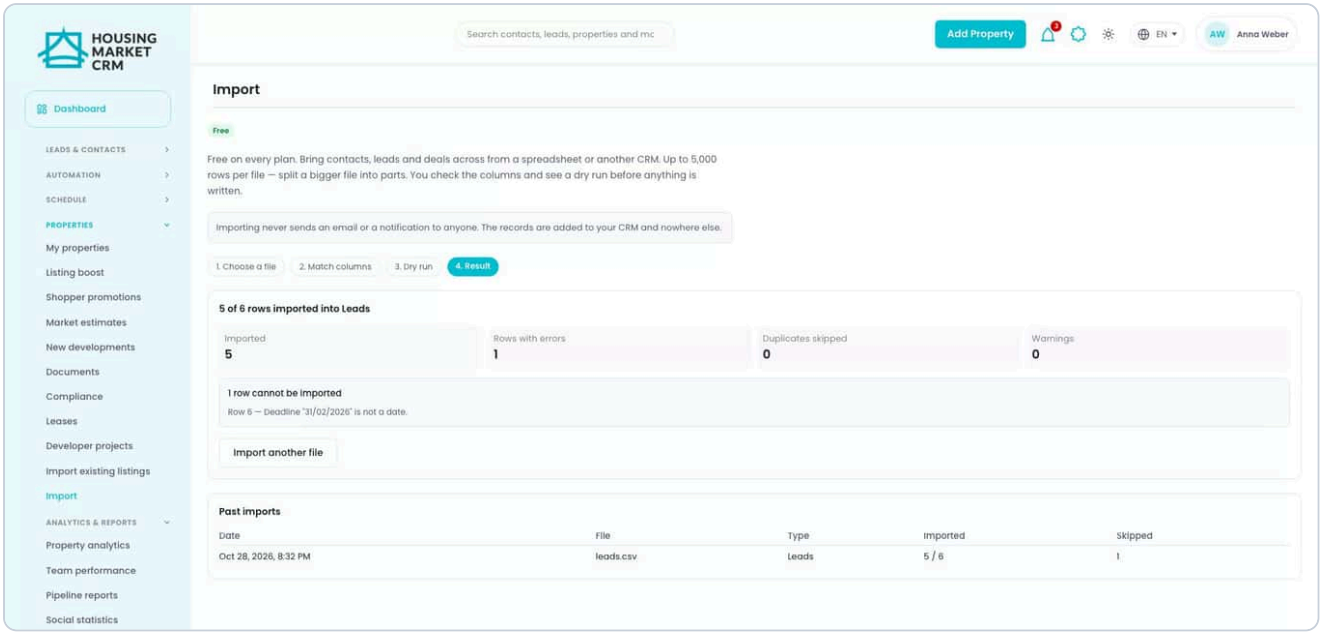


Figure 25.11 · Screen recorded 28 October 2026

12 Your leads are in the CRM. **Nobody was emailed.**

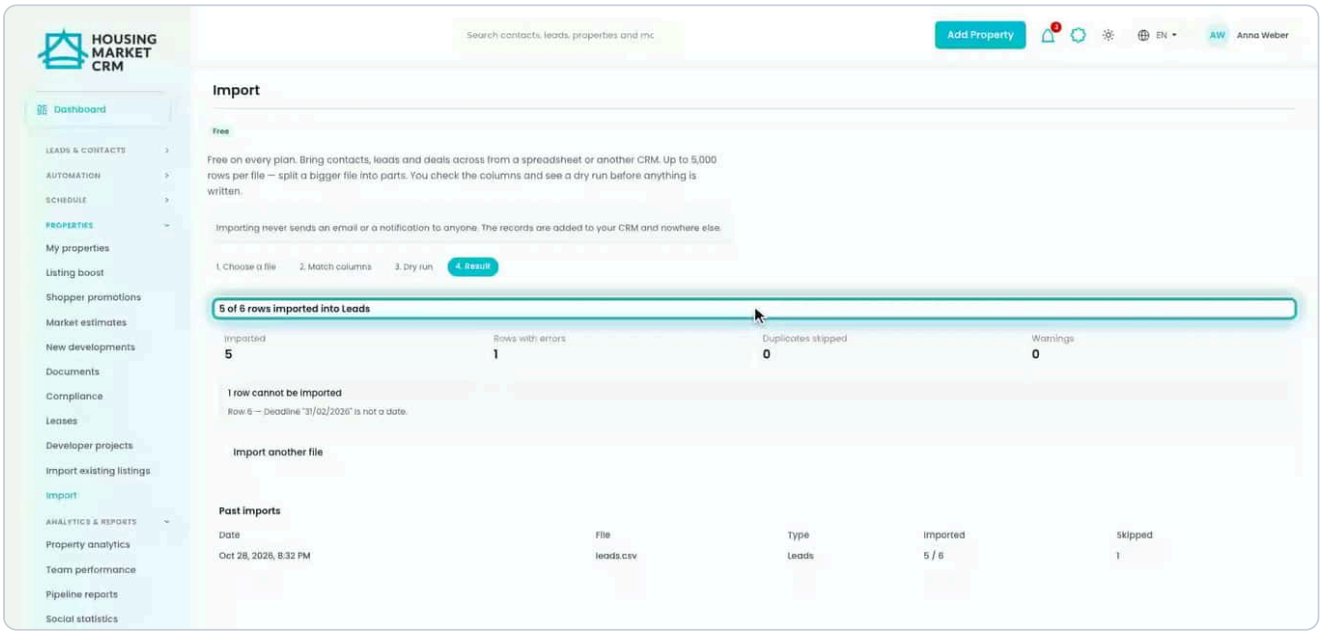


Figure 25.12 · Screen recorded 28 October 2026

13 Click **Import another file.**

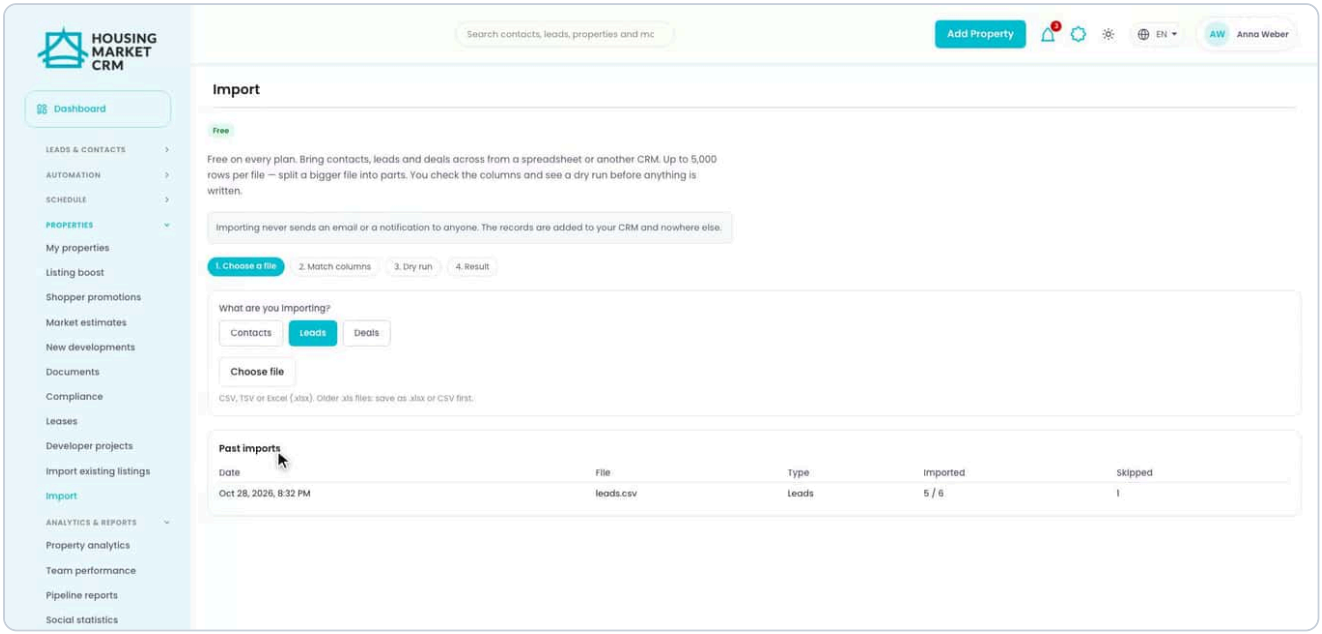


Figure 25.13 · Screen recorded 28 October 2026

14 Now choose **Deals.**

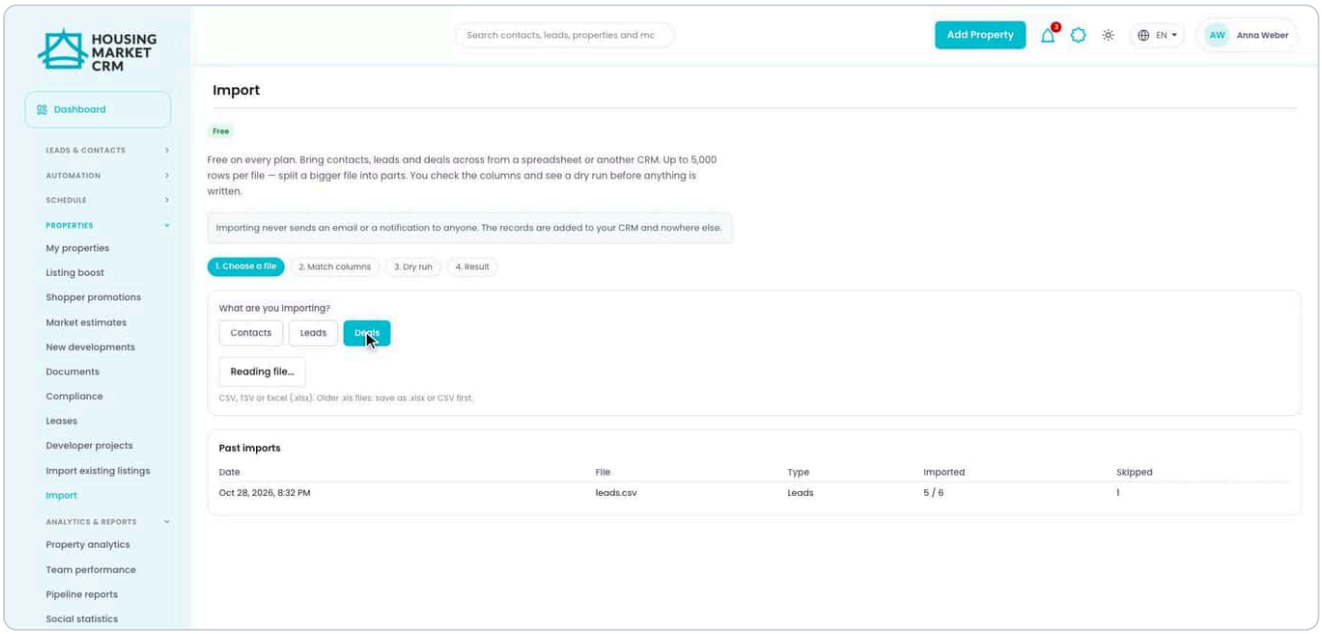


Figure 25.14 · Screen recorded 28 October 2026

15 Pick the deals file the same way.

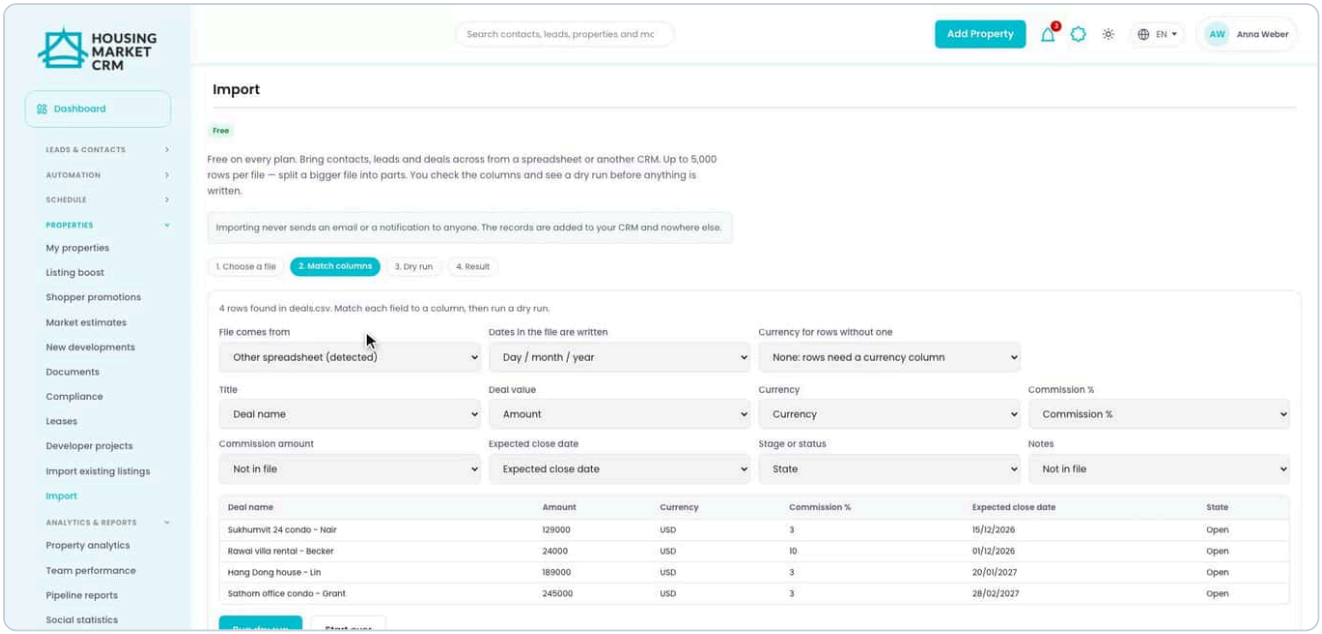


Figure 25.15 · Screen recorded 28 October 2026

16 Deals need an **amount** and a **currency**: here USD, from the file.

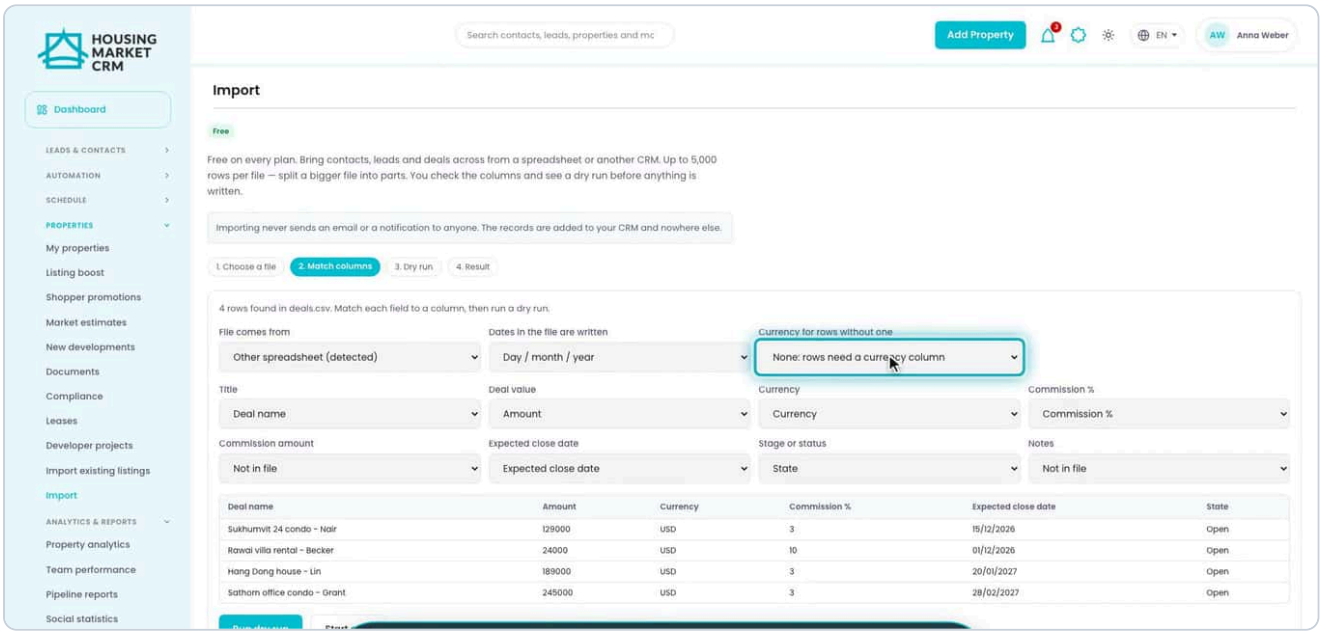


Figure 25.16 · Screen recorded 28 October 2026

17 Run the **dry run** then **import** your deals.

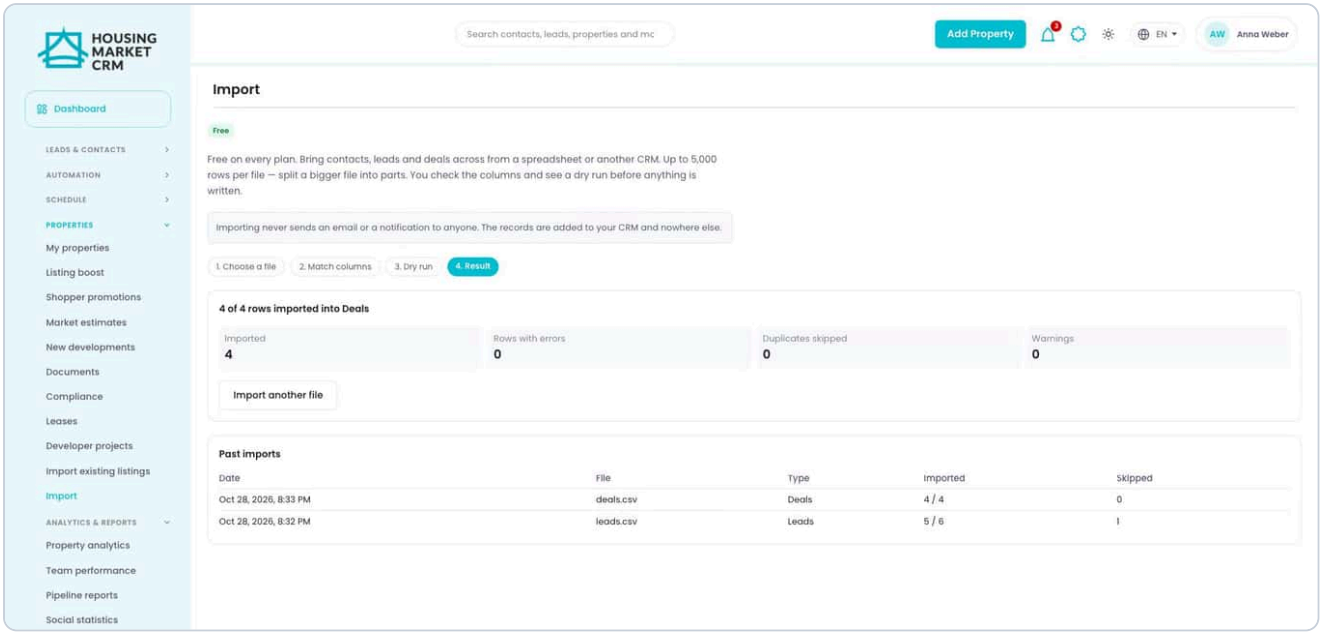


Figure 25.17 · Screen recorded 28 October 2026

18 Every import is listed under **Past imports**.

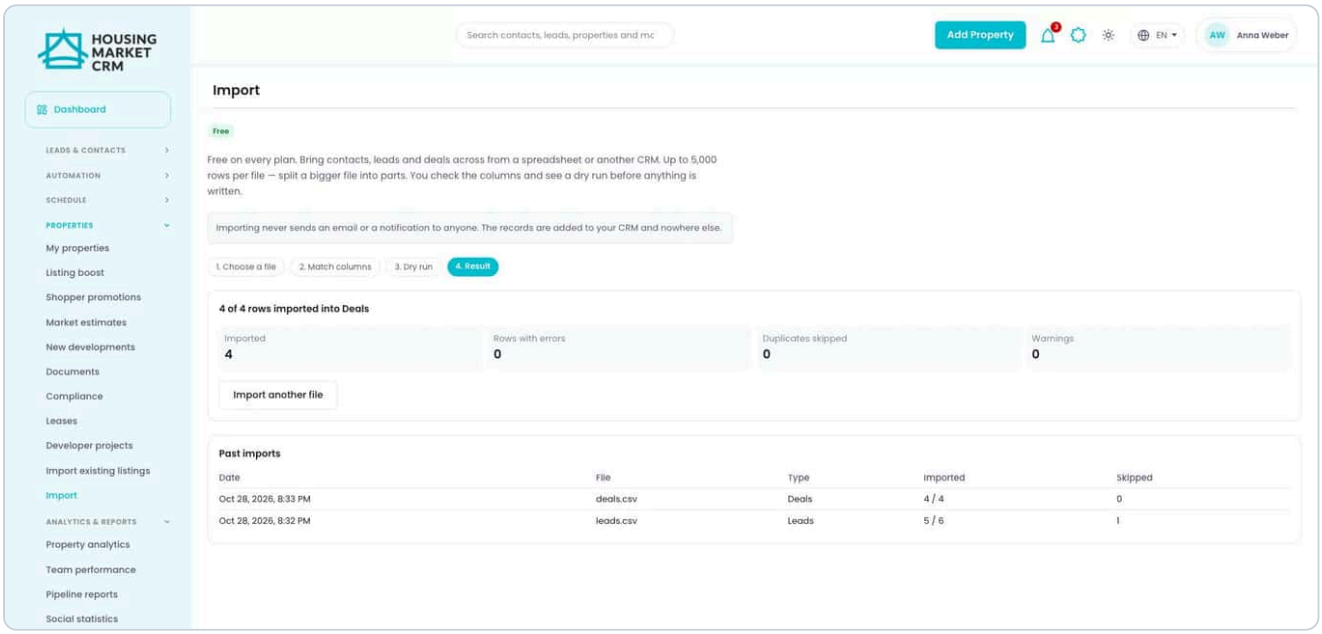


Figure 25.18 · Screen recorded 28 October 2026

19 Free on every plan: contacts, leads and deals.

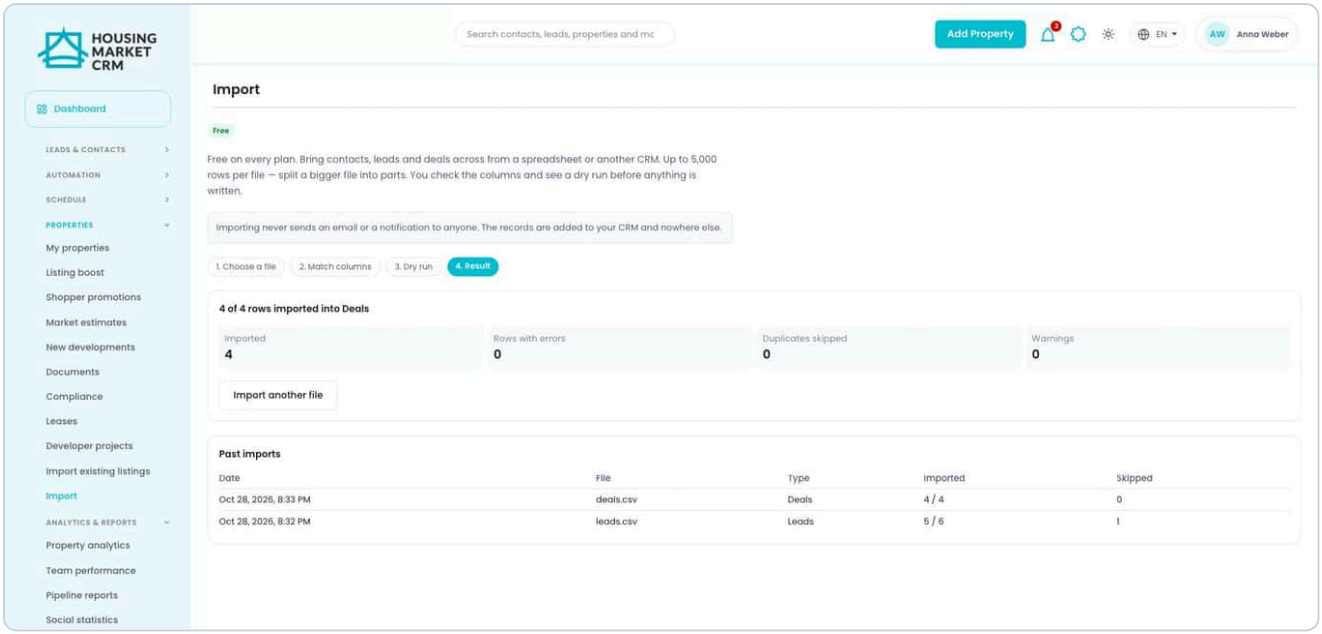


Figure 25.19 · Screen recorded 28 October 2026

26 CHAPTER 26

Scan a business card

Pro and Business | For agents | Watch the video

OVERVIEW

Yes, on Pro. Photograph a card with your phone and the CRM reads it into a draft contact, which you check before saving.

Open Scan card on your phone and take a photo of the card. The CRM reads the name, company, job title, email addresses, phone numbers, website, address and messaging handles into the ordinary new-contact form.

Nothing is saved on its own: you check the draft and press save, so a misread digit never becomes a record. If a contact you can see already has the same email address or phone number, the draft says so, and you can open that contact instead of creating a duplicate.

From the Help Center: **Can I scan a business card into the CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

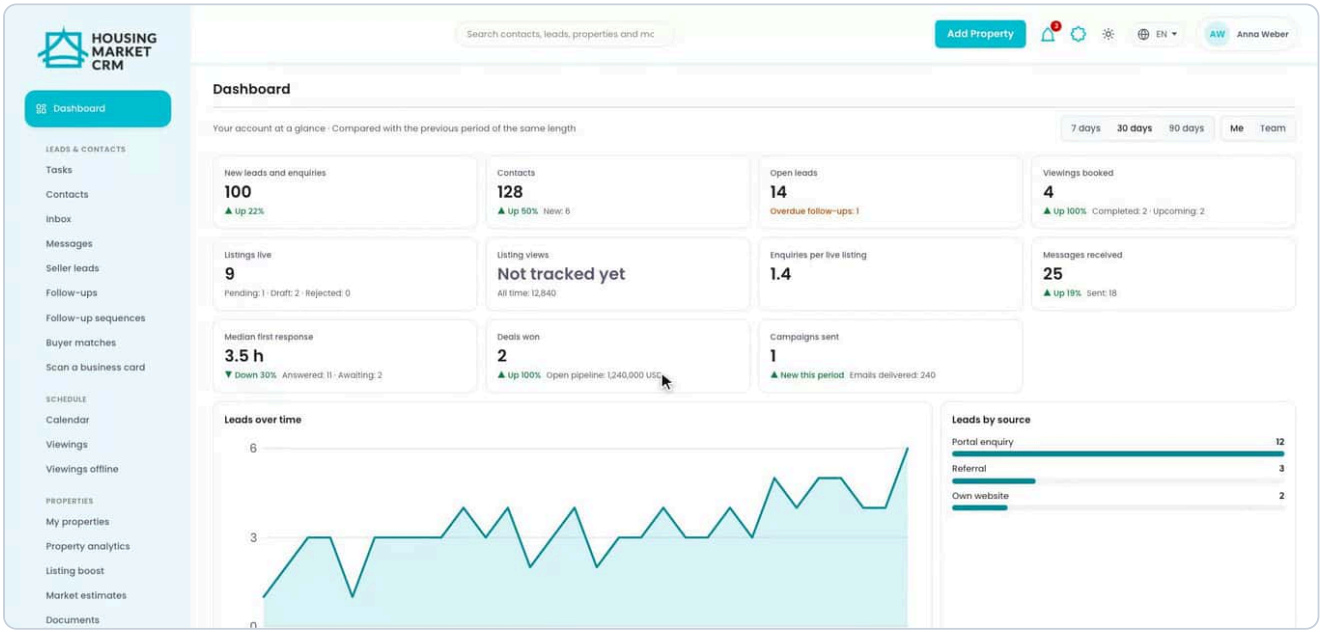


Figure 26.1 · Screen recorded 8 October 2026

2 Click **Scan a business card** in the left menu.

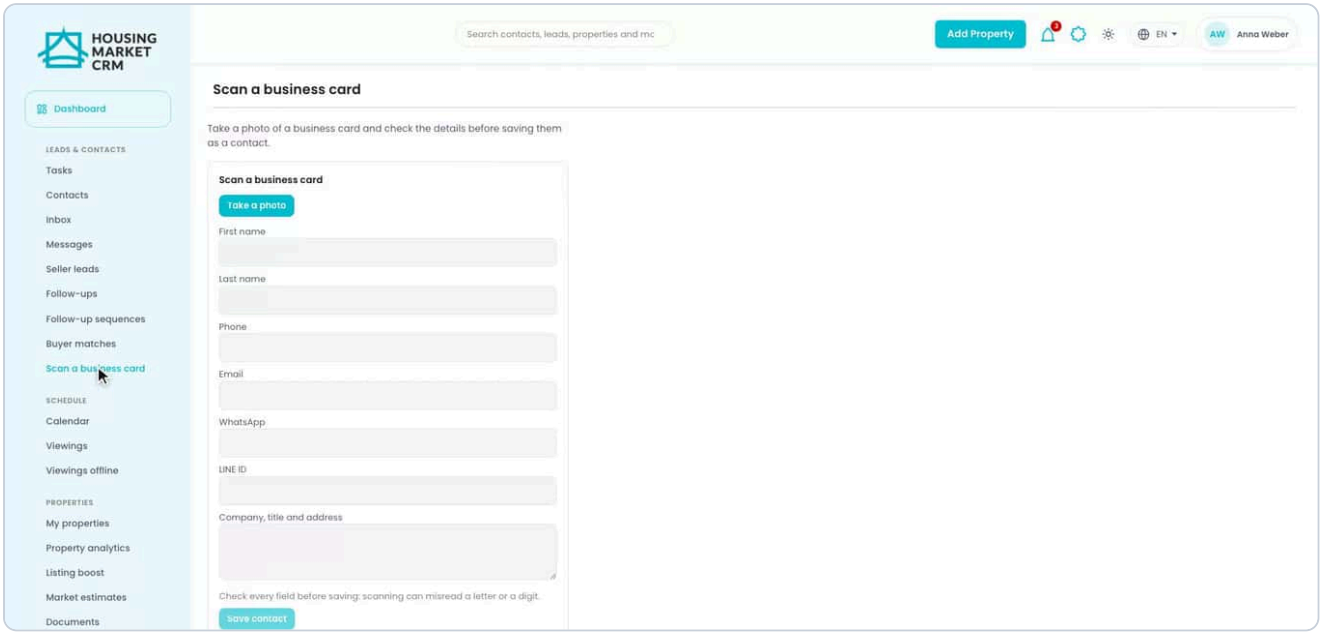


Figure 26.2 · Screen recorded 8 October 2026

3 Photograph the card **flat**, in daylight.

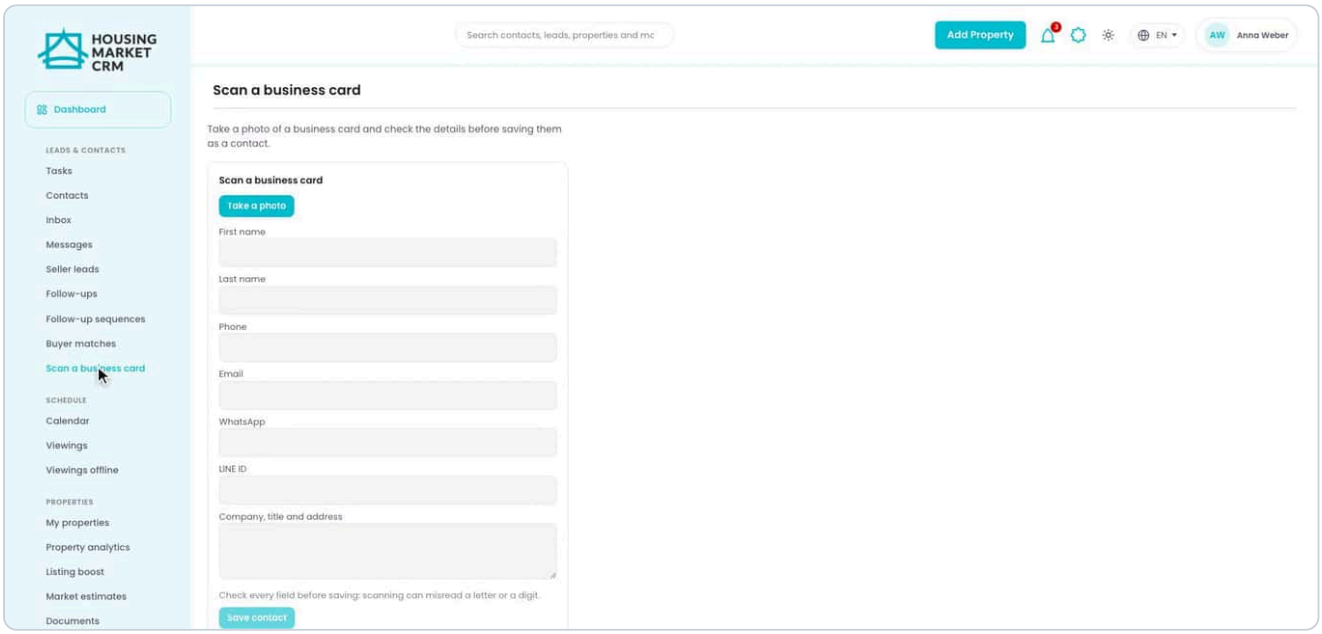


Figure 26.3 · Screen recorded 8 October 2026

4 Name, company, job title, numbers and email — **filled in for you**.

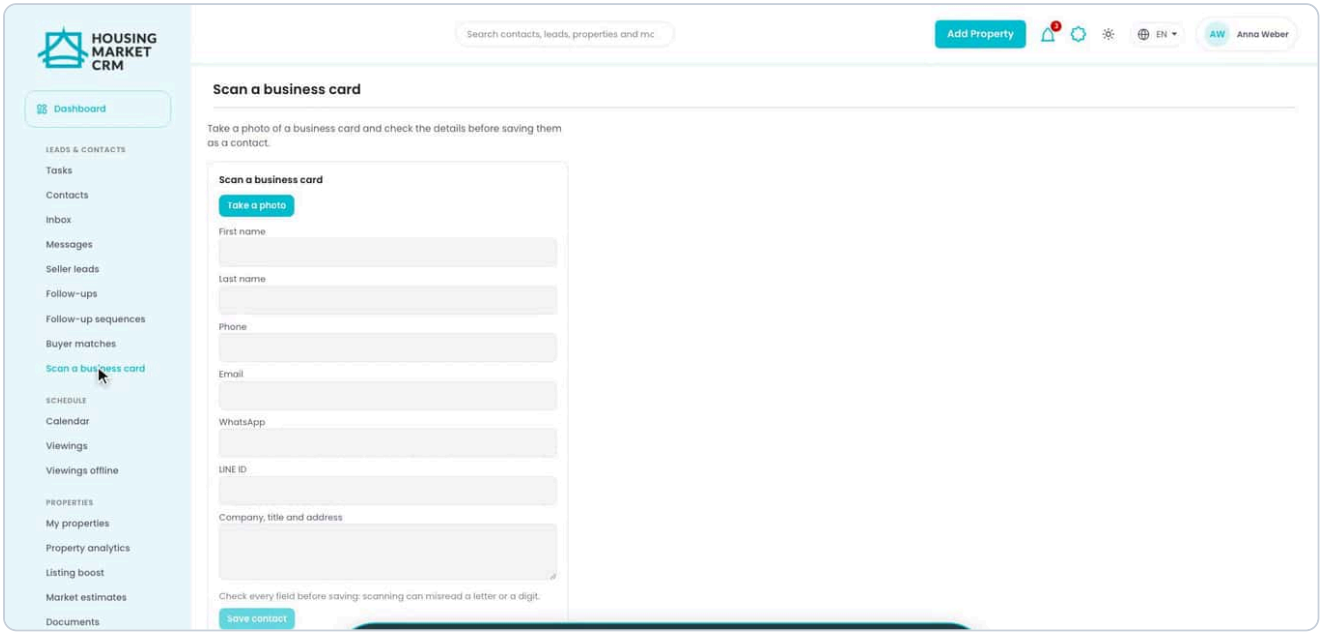


Figure 26.4 · Screen recorded 8 October 2026

5 Read them. The scan is a **typist**, not a proofreader.

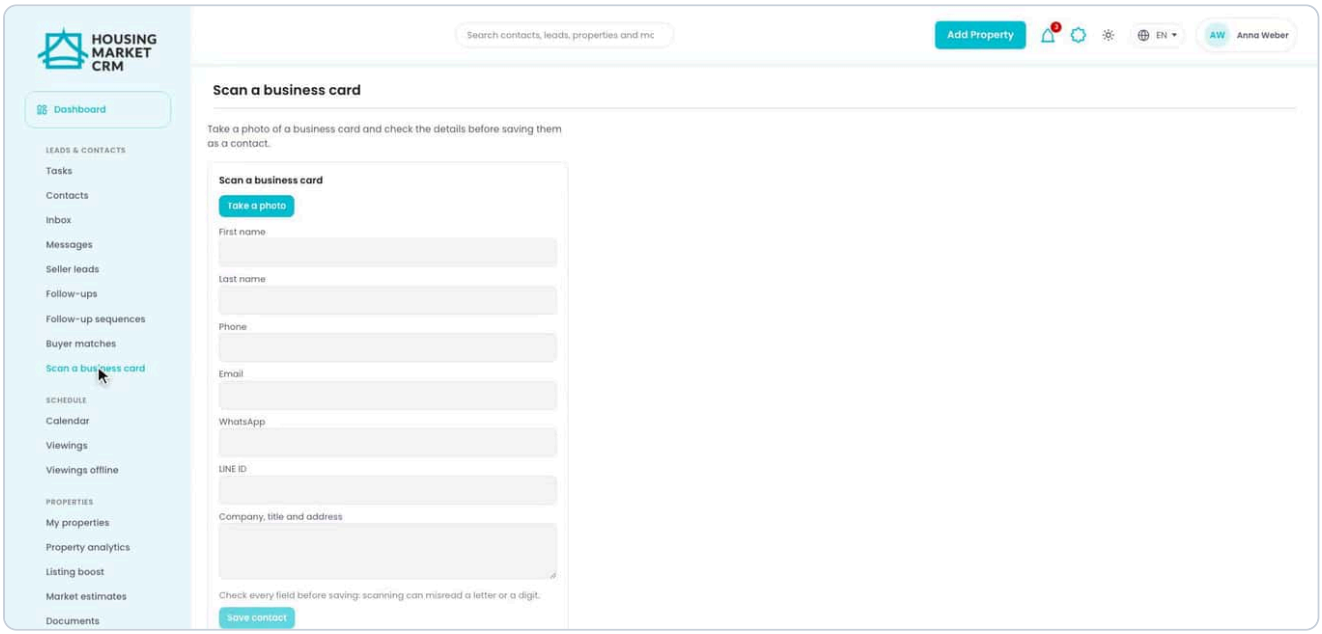


Figure 26.5 · Screen recorded 8 October 2026

6 Then **Save contact**.

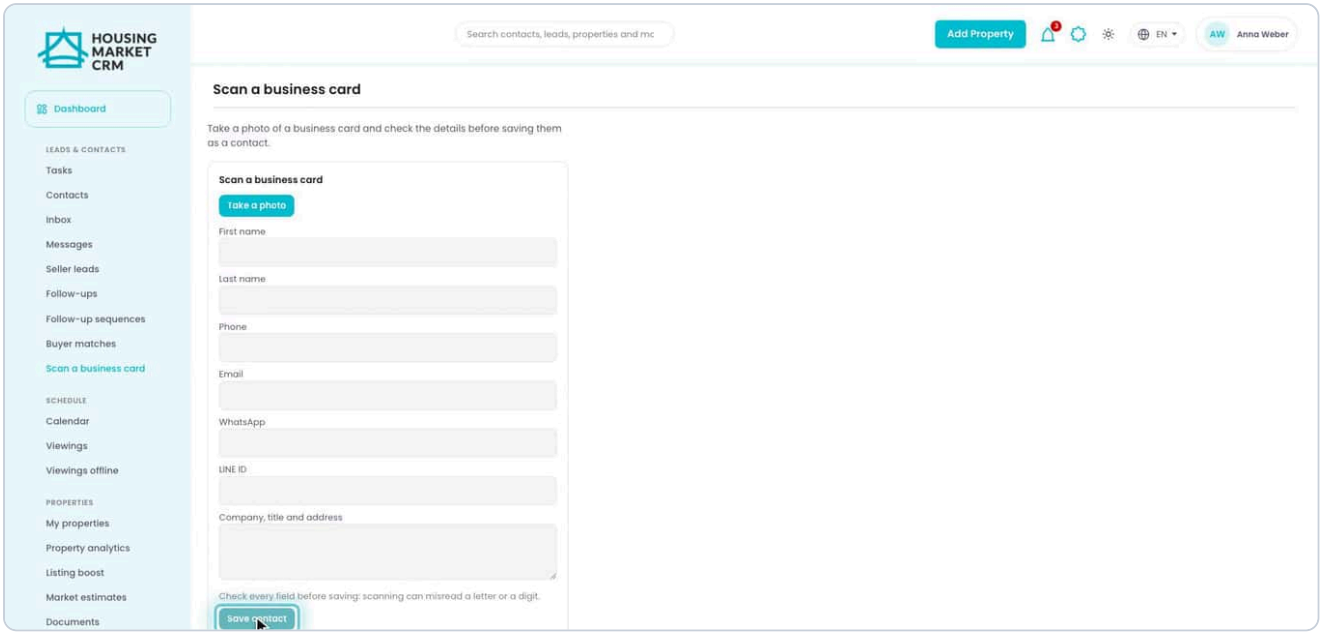


Figure 26.6 · Screen recorded 8 October 2026

7 Do it the same evening, while you still remember who they were.

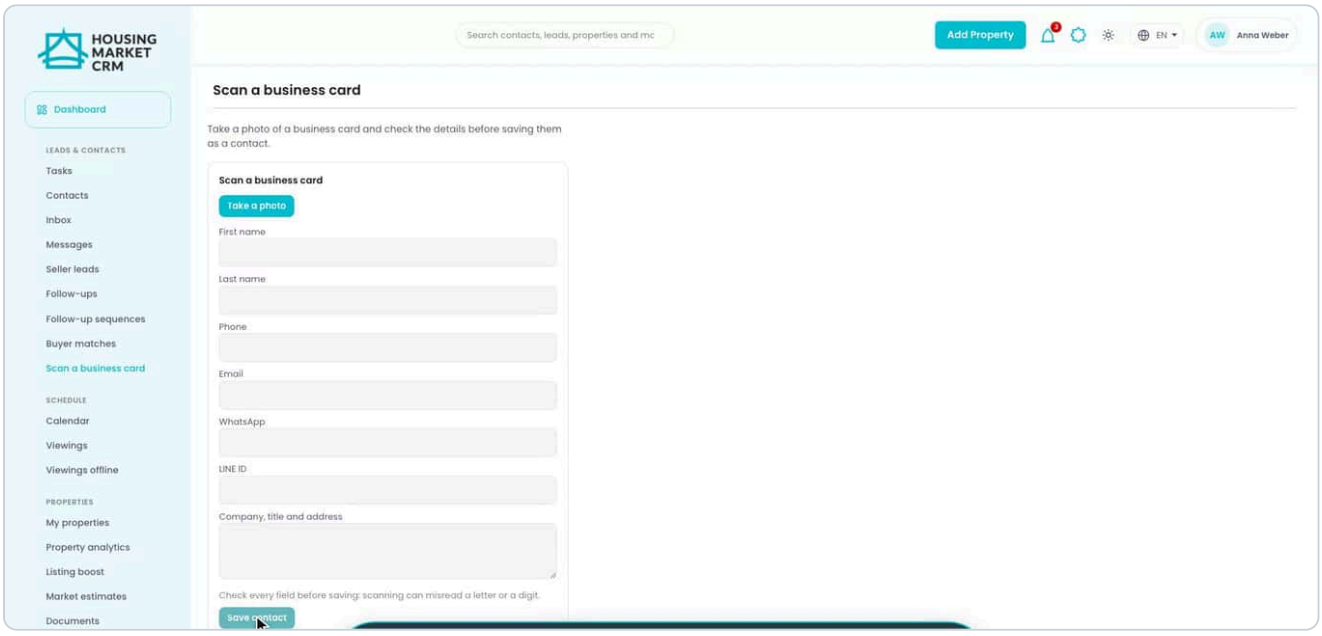


Figure 26.7 · Screen recorded 8 October 2026

8 Eleven cards from a property show, and none of them typed in.

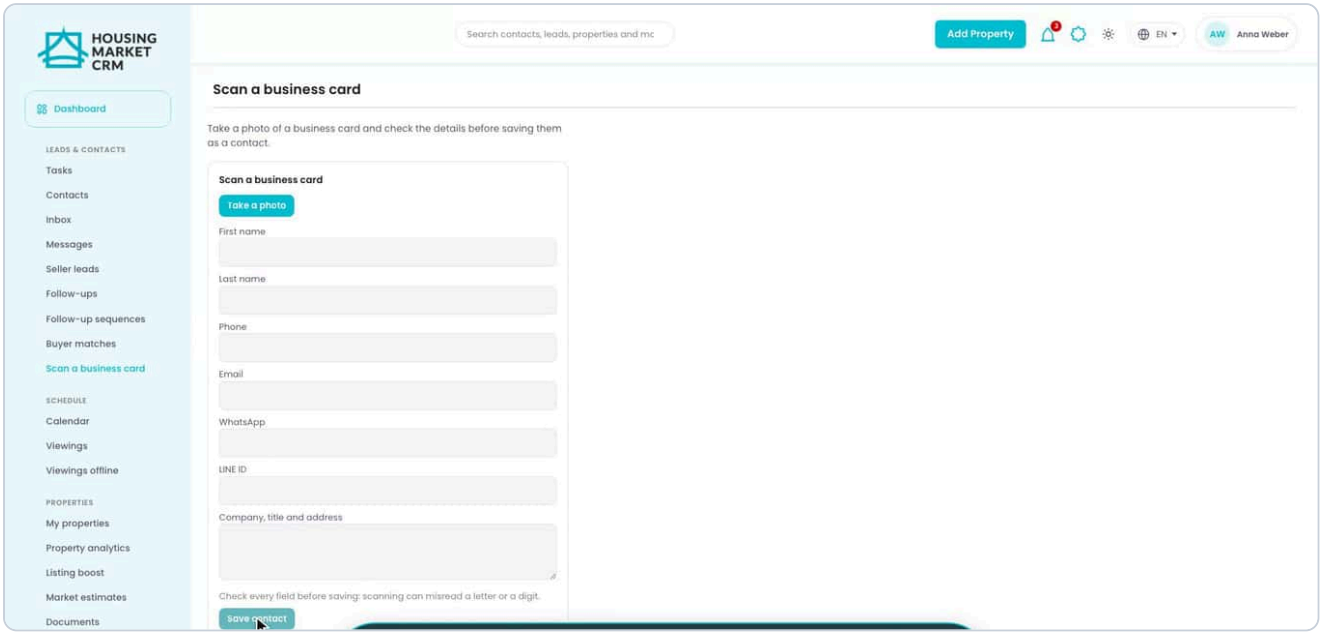


Figure 26.8 · Screen recorded 8 October 2026

9 A card with **two numbers** gives you both — delete the one you will not use.

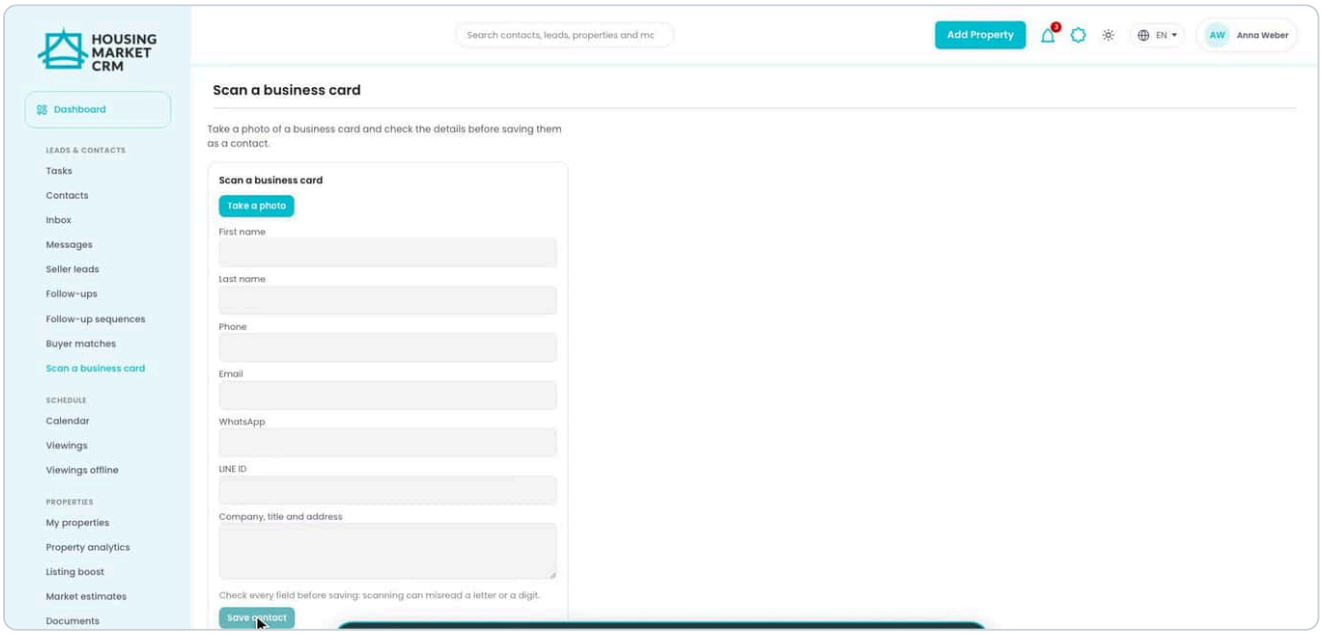


Figure 26.9 · Screen recorded 8 October 2026

10 Add a note while you still remember the conversation.

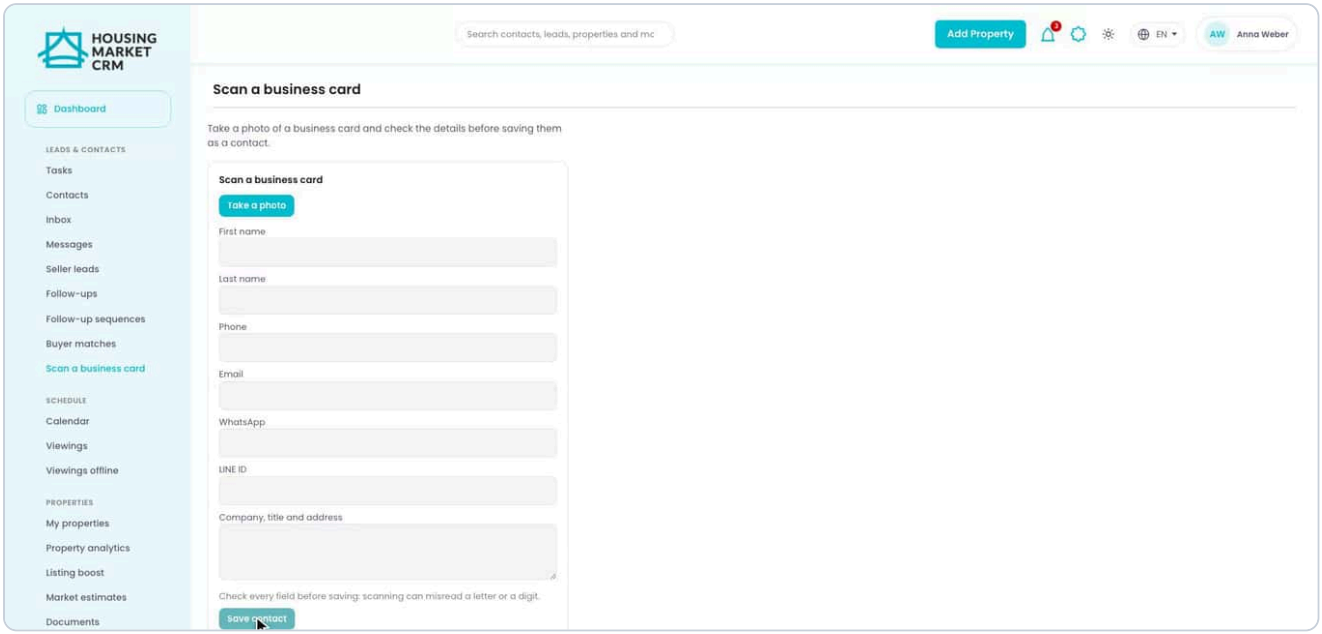


Figure 26.10 · Screen recorded 8 October 2026

RELATED HELP CENTER ARTICLES

Can I use Housing Market CRM on my phone?	faq.housingmarketgroup.com/faq/can-i-use-the-crm-on-my-phone

27 CHAPTER 27

The contact timeline

All plans | For agents | Watch the video

OVERVIEW

Yes. The inbox keeps one thread per person, and every contact has a timeline of everything that happened with them, on every plan.

The inbox gathers portal enquiries and your replies, Housing Market Ads leads and the email you send from the CRM into one thread per person. Each contact also carries a timeline, notes, comments, files and the follow-ups still outstanding, so picking a conversation back up after three weeks does not mean reconstructing it from memory.

What the CRM does not do yet is read your own mailbox, carry WhatsApp, or collect the enquiries a Housing Market Cloud website receives. Two-way sync with your Gmail or Microsoft 365 mailbox, sending through WhatsApp Business, and the connection to Cloud are being built. On Pro you can keep WhatsApp templates and open WhatsApp on your phone with the text ready — see "How do WhatsApp templates work?". Your own calendar is a different matter: on Pro, Google Calendar and Outlook already sync with the CRM in both directions — see "Can I sync the CRM with my calendar?".

From the Help Center: **Can I track communication with buyers?**

STEP BY STEP

1 Open **Contacts.**

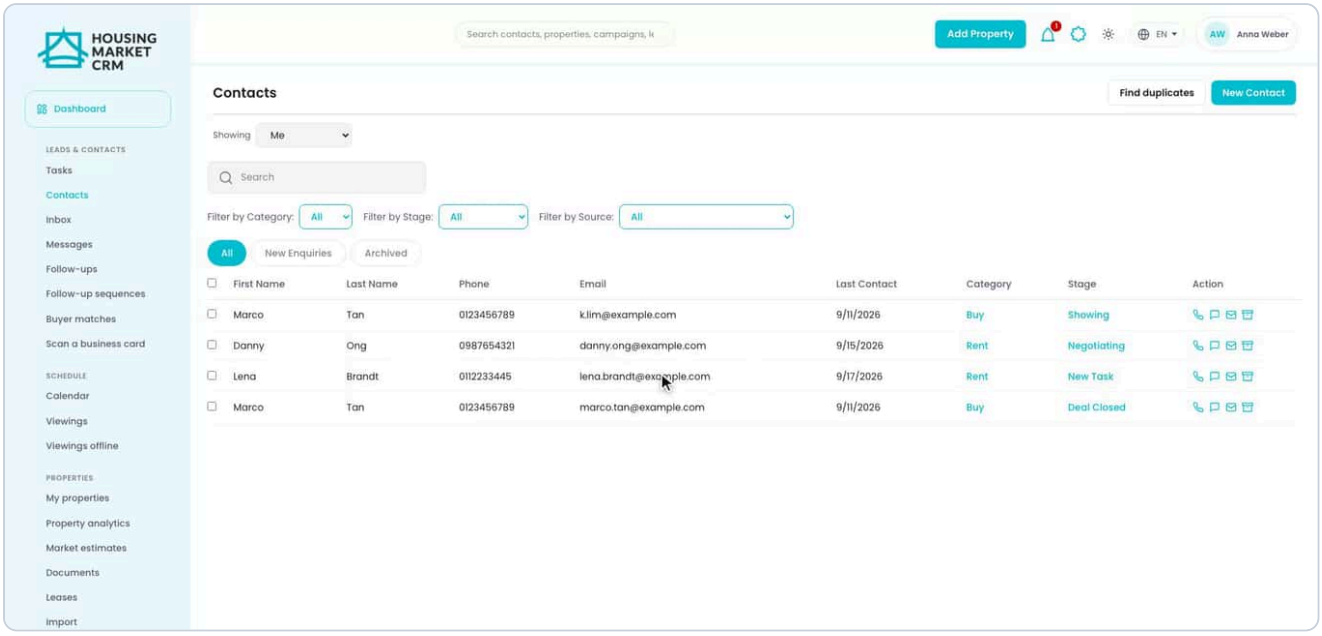


Figure 27.1 · Screen recorded 17 September 2026

2 Open a **contact** from your list.

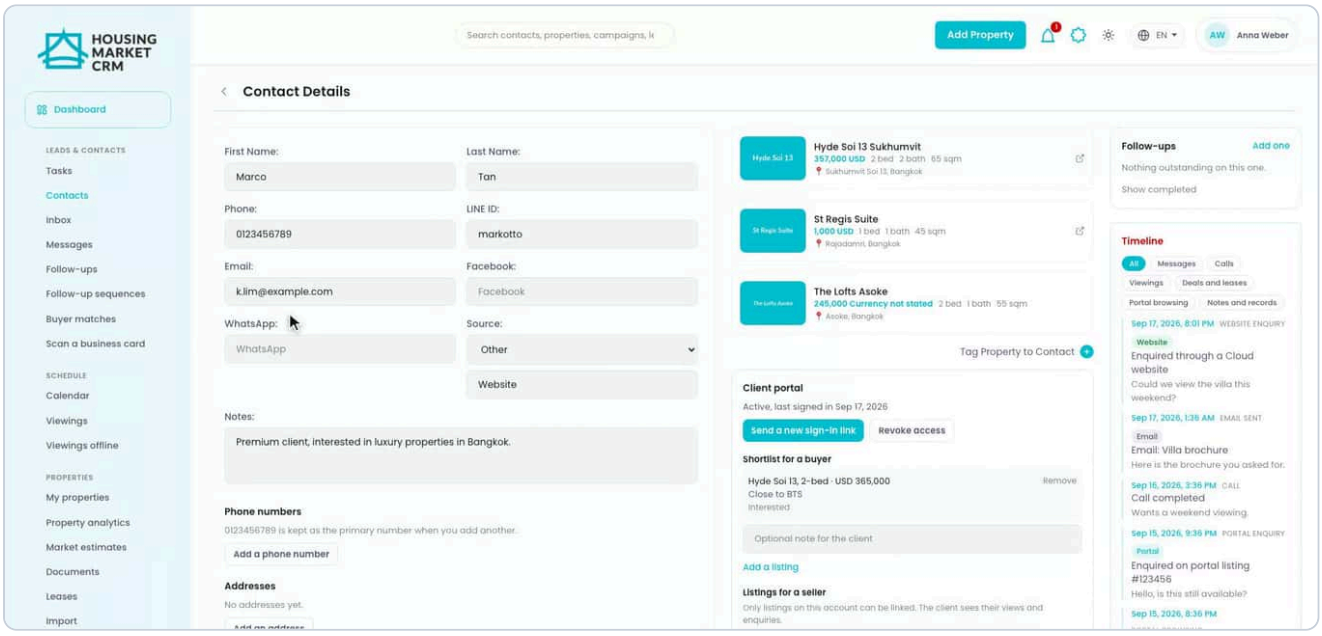


Figure 27.2 · Screen recorded 17 September 2026

3 Their **details**, messaging handles and **source** are at the top.

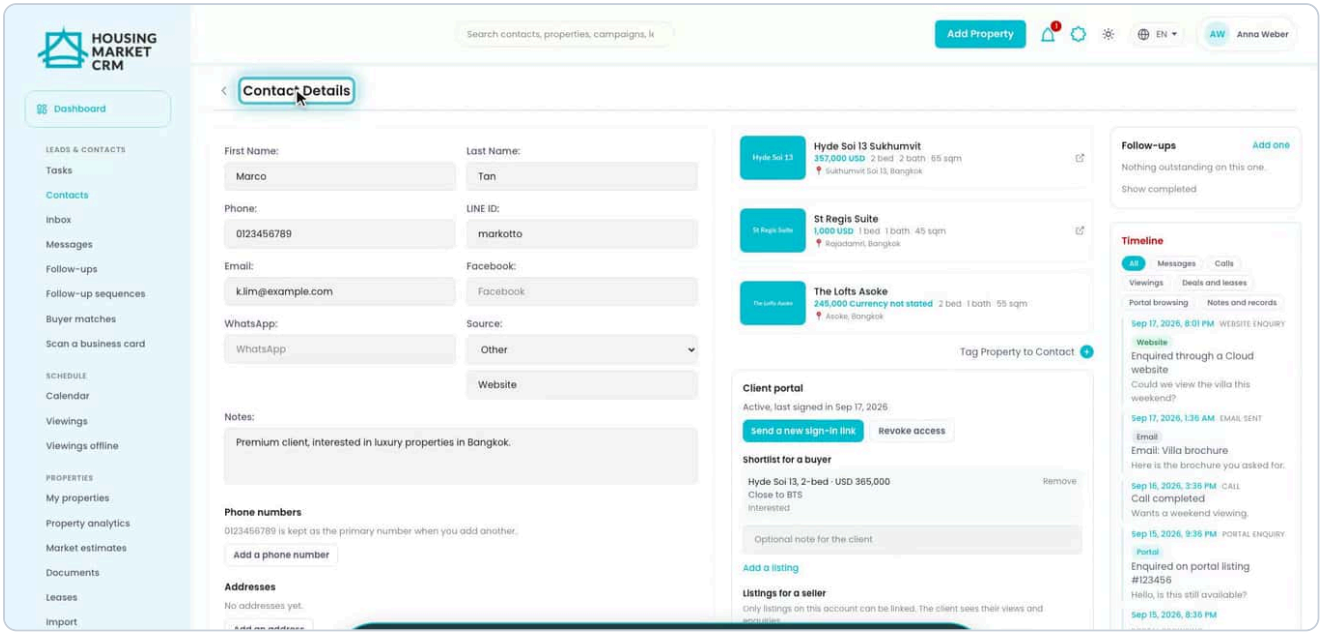


Figure 27.3 · Screen recorded 17 September 2026

4 Scroll to **Timeline**.

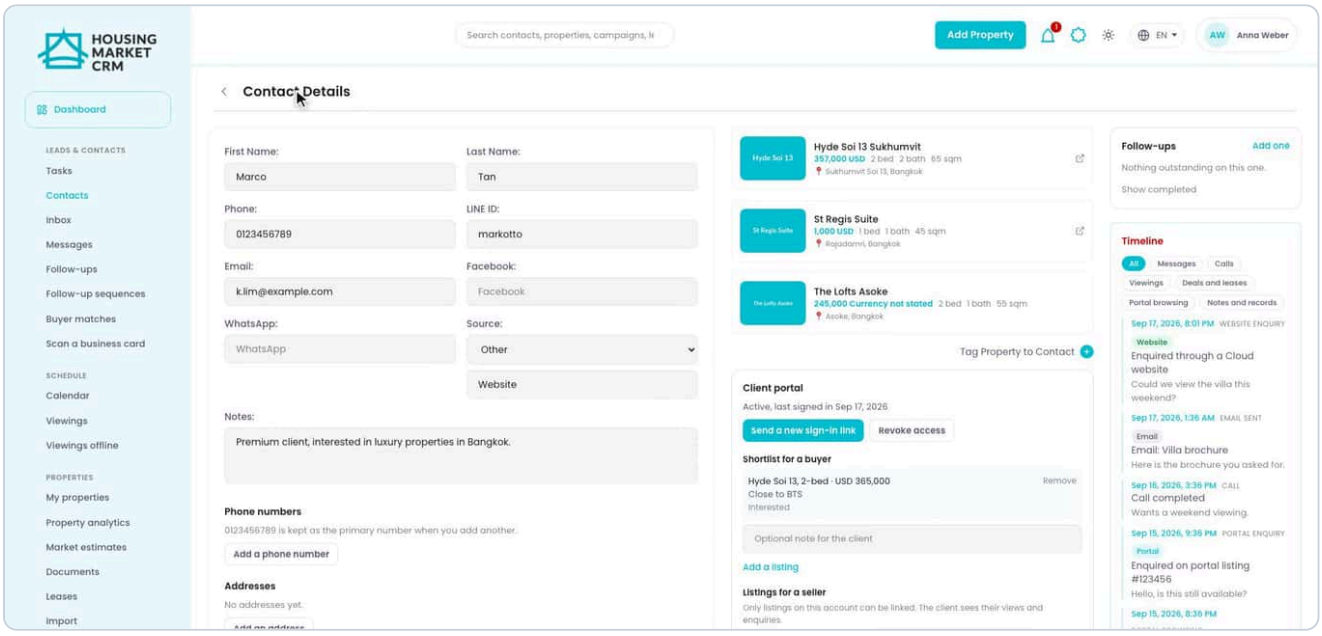


Figure 27.4 · Screen recorded 17 September 2026

5 Enquiries, website and ad leads, emails and viewings — **in order**.

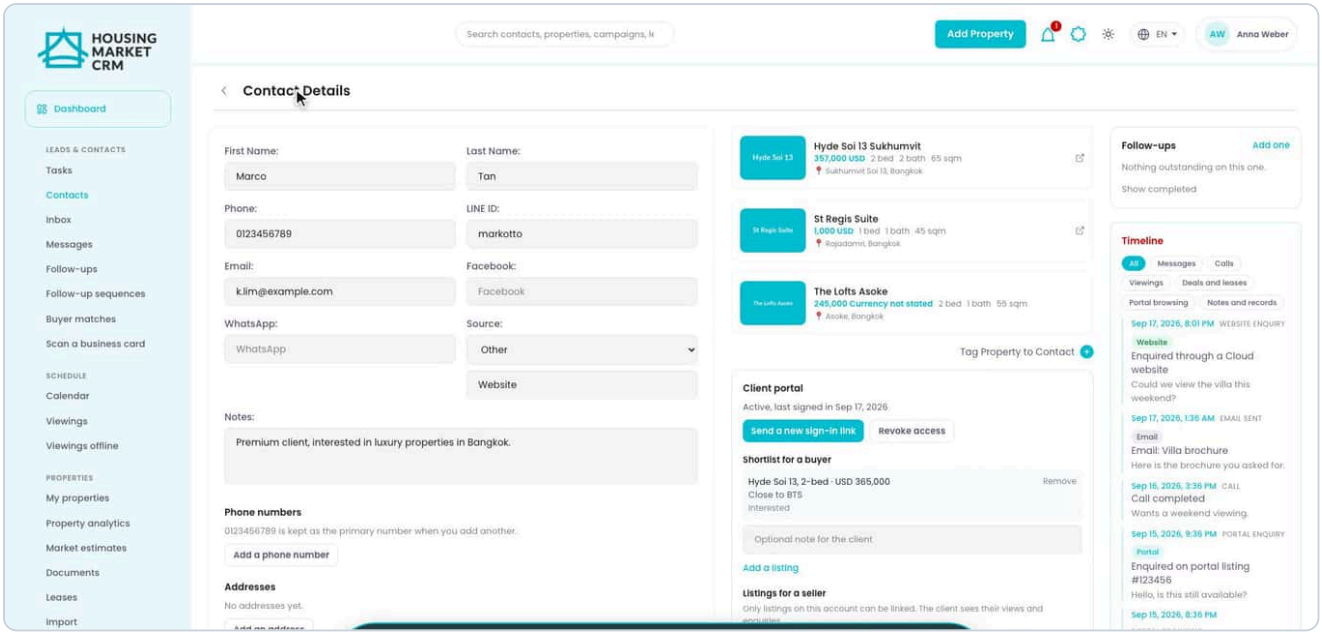


Figure 27.5 · Screen recorded 17 September 2026

6 Check it before every call to know the **whole story**.

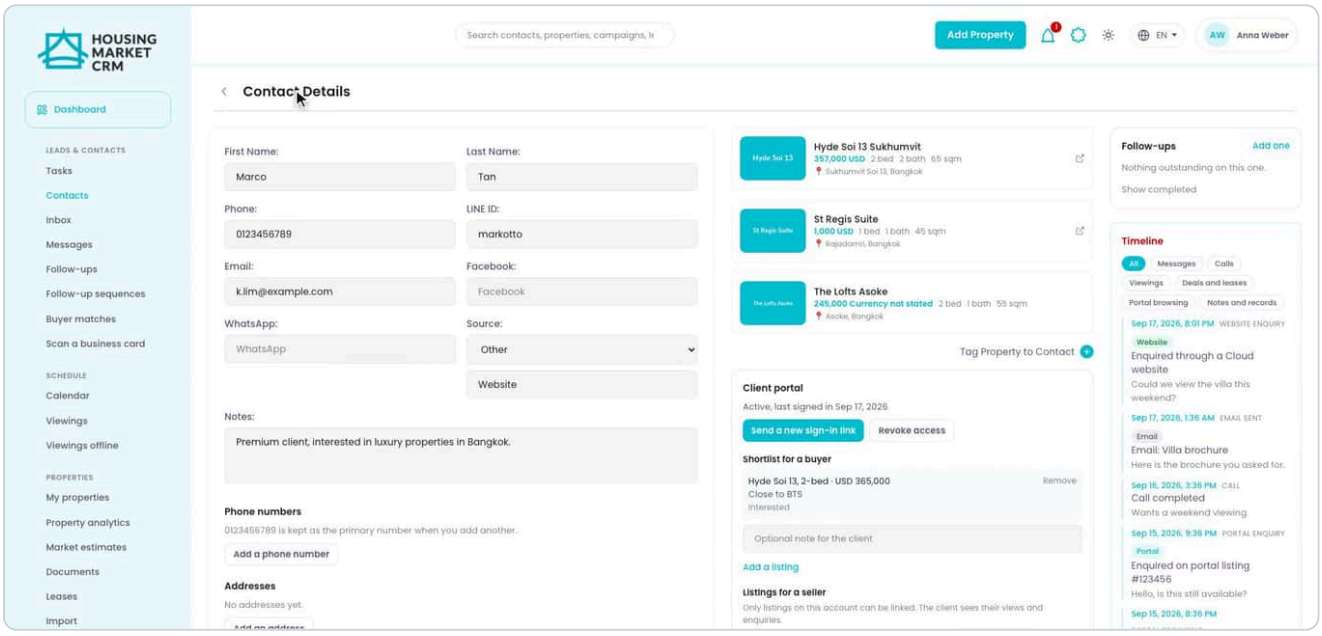


Figure 27.6 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

What is the inbox in the CRM? — faq.housingmarketgroup.com/faq/what-is-the-unified-inbox

28 CHAPTER 28

Merge duplicate contacts

All plans | For agents | Watch the video

OVERVIEW

Yes. The CRM finds contacts that look like the same person entered twice, and a user with the right to delete can merge a pair into one record. The record you do not keep is archived rather than destroyed.

Open Contacts and choose the duplicates view. The CRM compares every contact with every other one and groups the pairs it finds by how sure it is: the same email address, or the same phone number and name, or a shared phone number alone — which can be two people in one household, so it is shown but never assumed.

Open both records before merging. A merge keeps one contact and moves everything attached to the other onto it — leads, notes, the activity trail, files and campaign history — and then archives the second record. The screen says so before you confirm: it will be archived, not deleted.

The merge itself still cannot be undone, and that is a different thing from the record being gone. The person is kept, and the archived record names the contact its history went to; what is not kept is which side each note, follow-up and file came from, so there is nothing to separate them back out with. Merge when you are sure the two rows are one person.

Because a merge archives a record, it needs the same permission as deleting one. On a team account that means a manager with the right to delete, or an admin; an agent can see the duplicates but not merge them. You can also mark a pair as not a duplicate so it stops being suggested — and a pair you have already merged does not come back as a suggestion.

See "What happens when I delete a contact, a lead or a colleague?" for what the archive is and how to get a record out of it.

From the Help Center: **Can I merge duplicate contacts?**

STEP BY STEP

1 Open **Duplicate contacts** from Contacts.

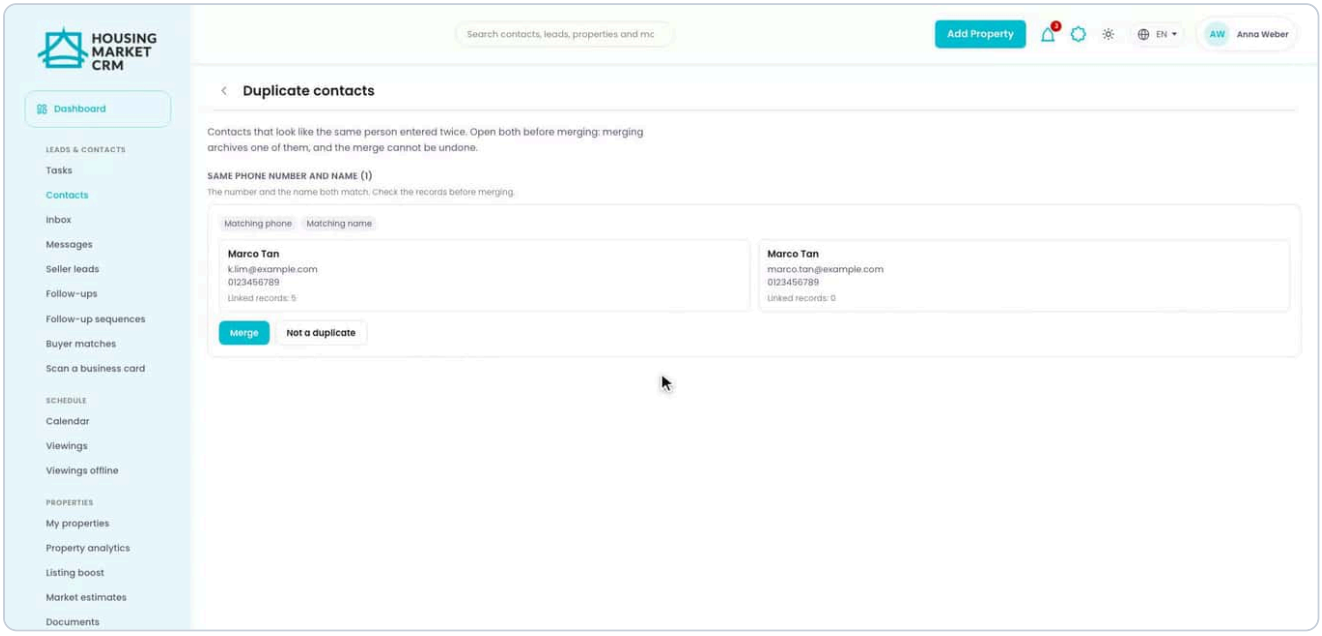


Figure 28.1 · Screen recorded 8 October 2026

2 Grouped by **why** they look like one person.

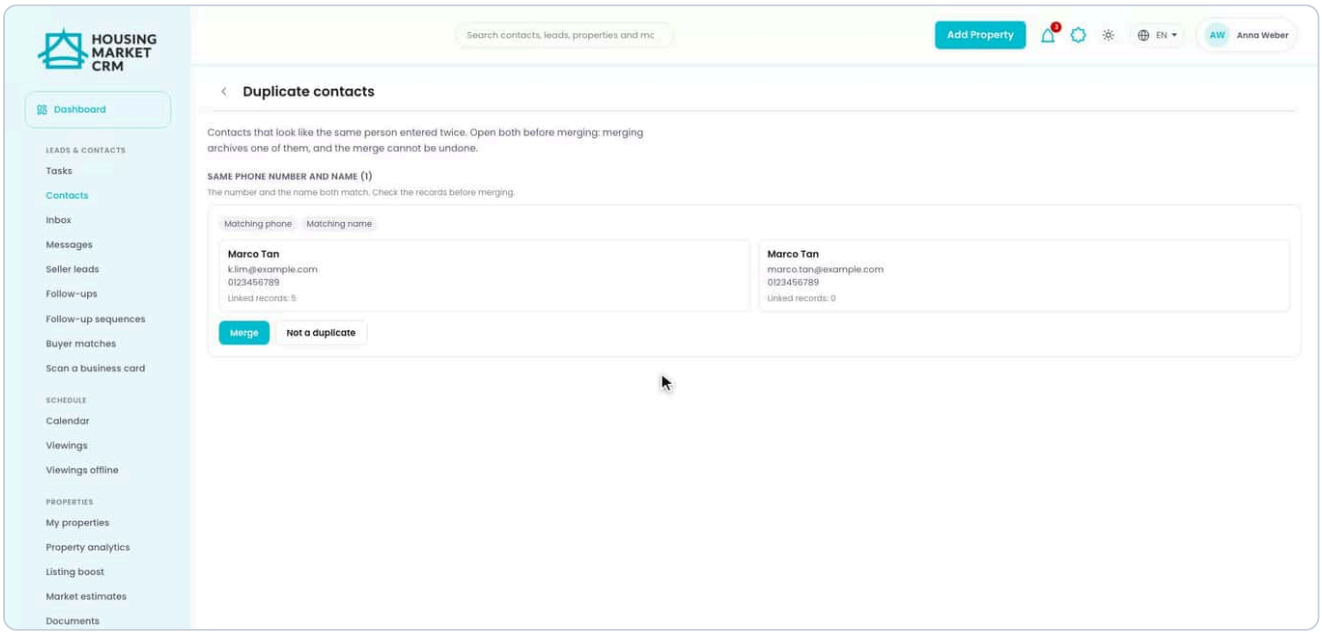


Figure 28.2 · Screen recorded 8 October 2026

3 Here: the **same phone number and name**.

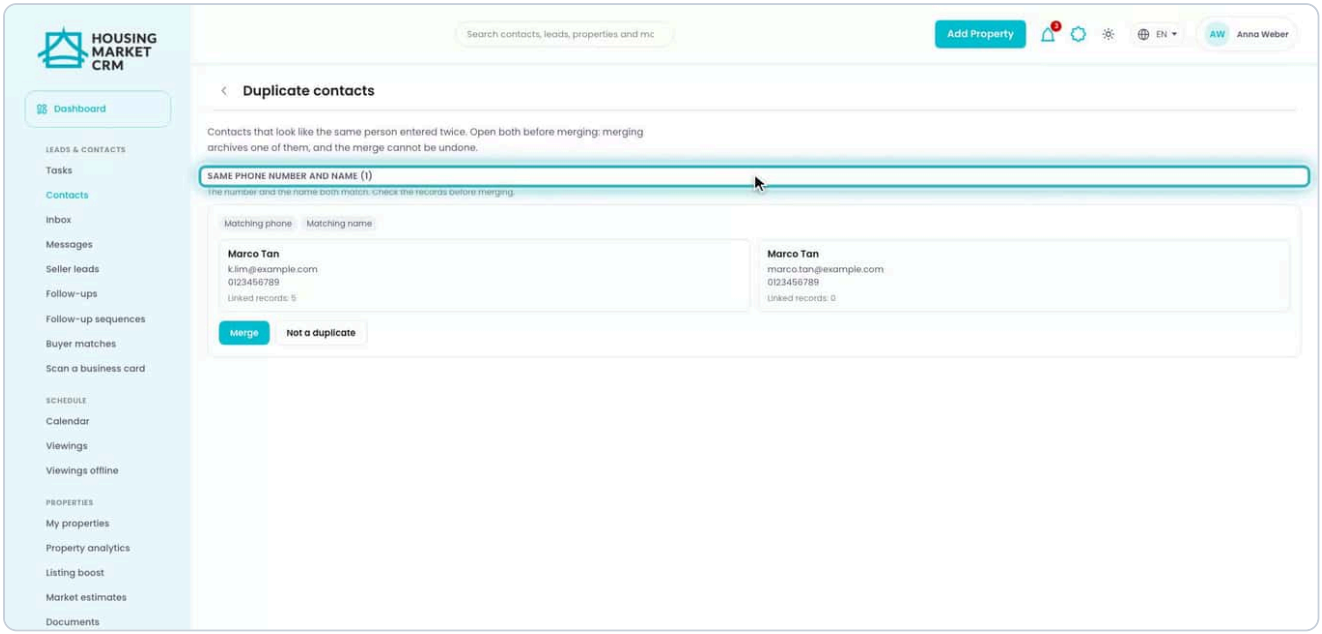


Figure 28.3 · Screen recorded 8 October 2026

4 Check **Linked records** — the busier record is the one to keep.

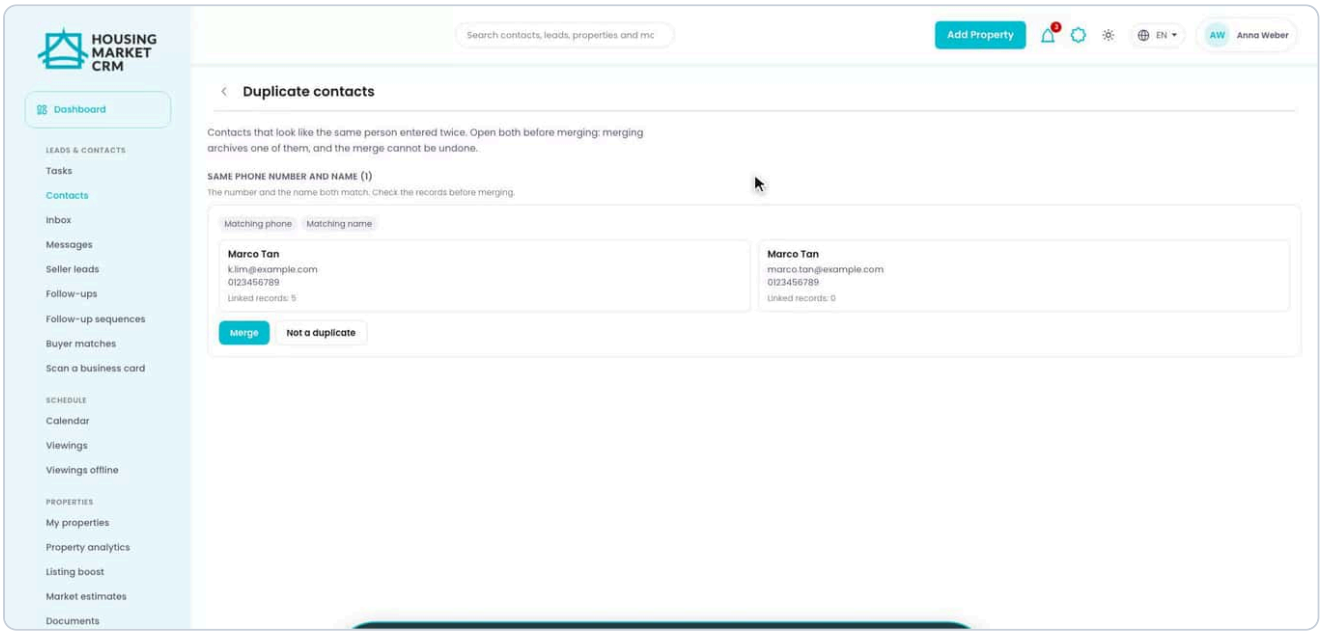


Figure 28.4 · Screen recorded 8 October 2026

5 **Not a duplicate** stops the list asking again.

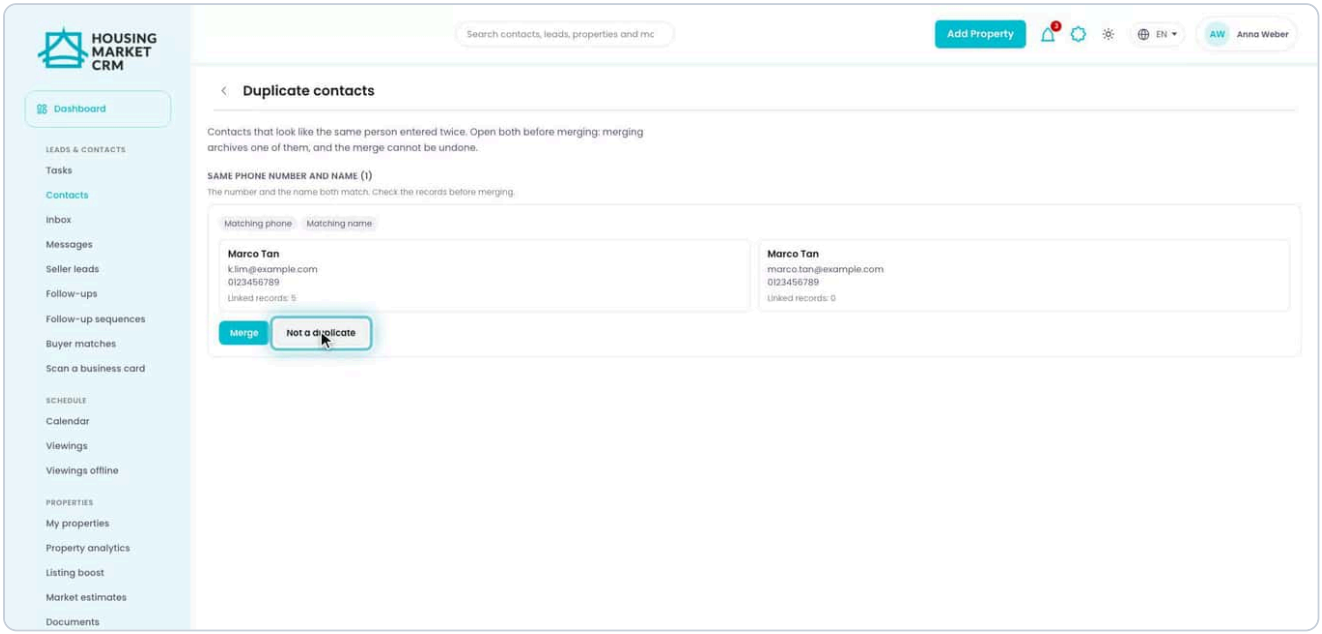


Figure 28.5 · Screen recorded 8 October 2026

6 **Merge** archives one side — and **cannot be undone**.

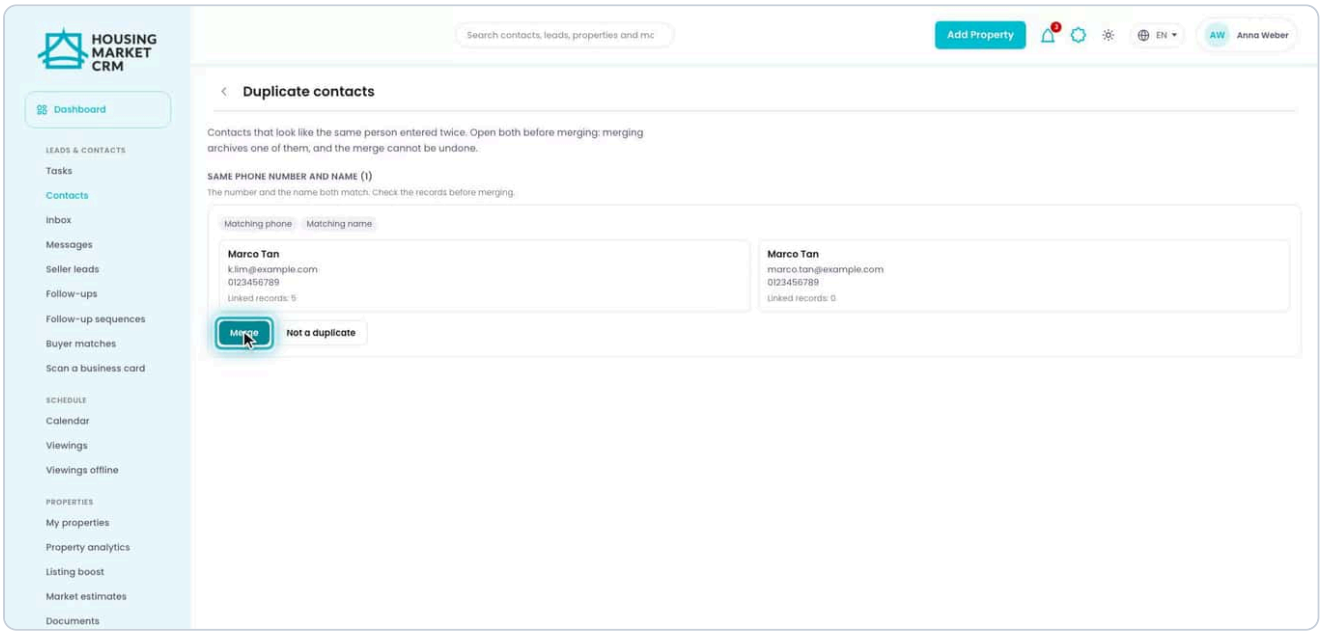


Figure 28.6 · Screen recorded 8 October 2026

7 So open both first. Nothing is deleted, but nothing comes back either.

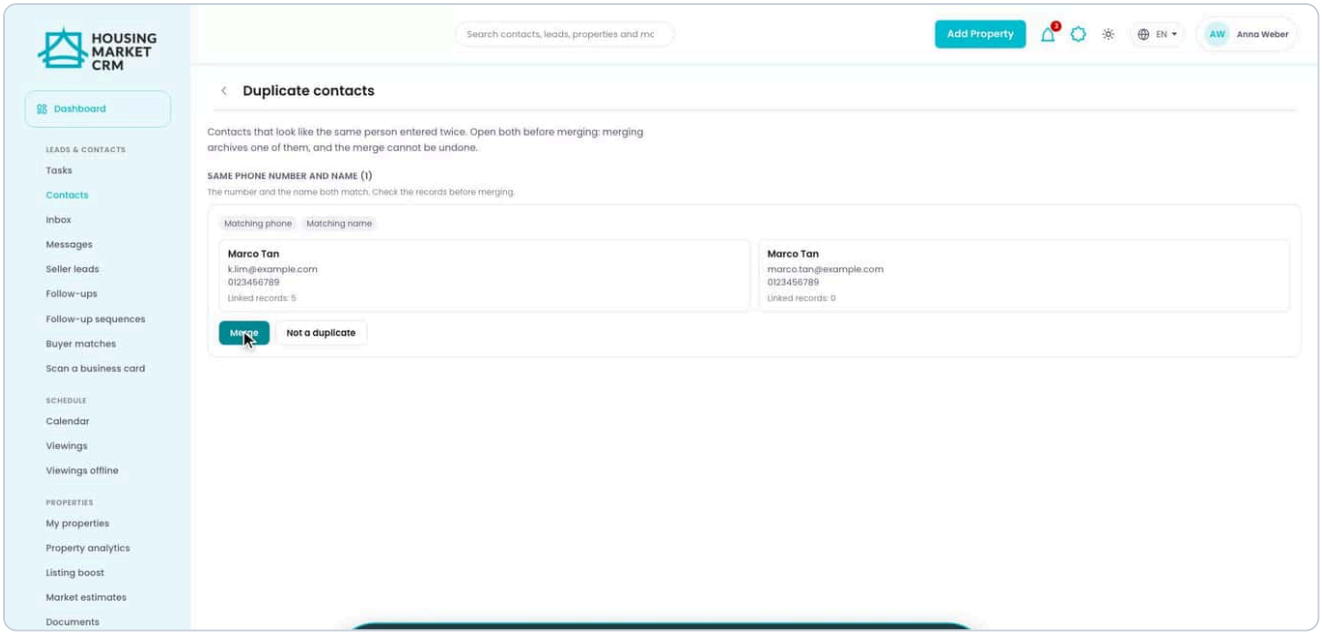


Figure 28.7 · Screen recorded 8 October 2026

8 One colleague types the name, another types the number — and now there are two.

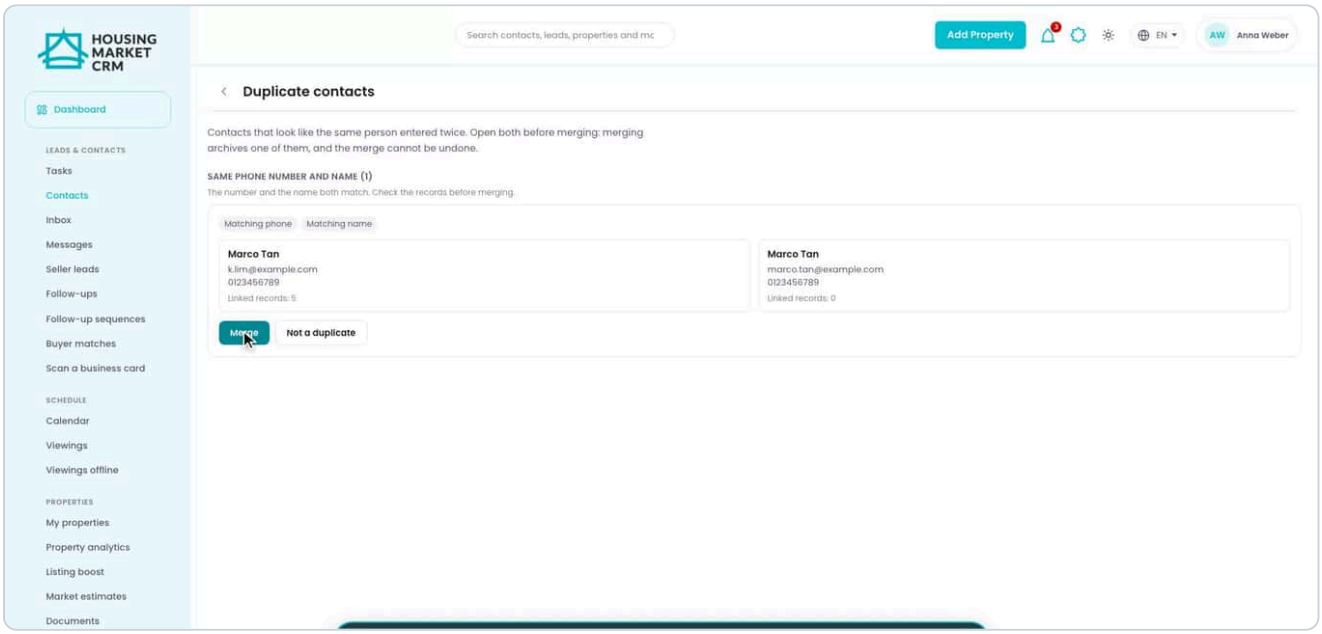


Figure 28.8 · Screen recorded 8 October 2026

9 Make it a **monthly** habit, not a yearly clean-up.

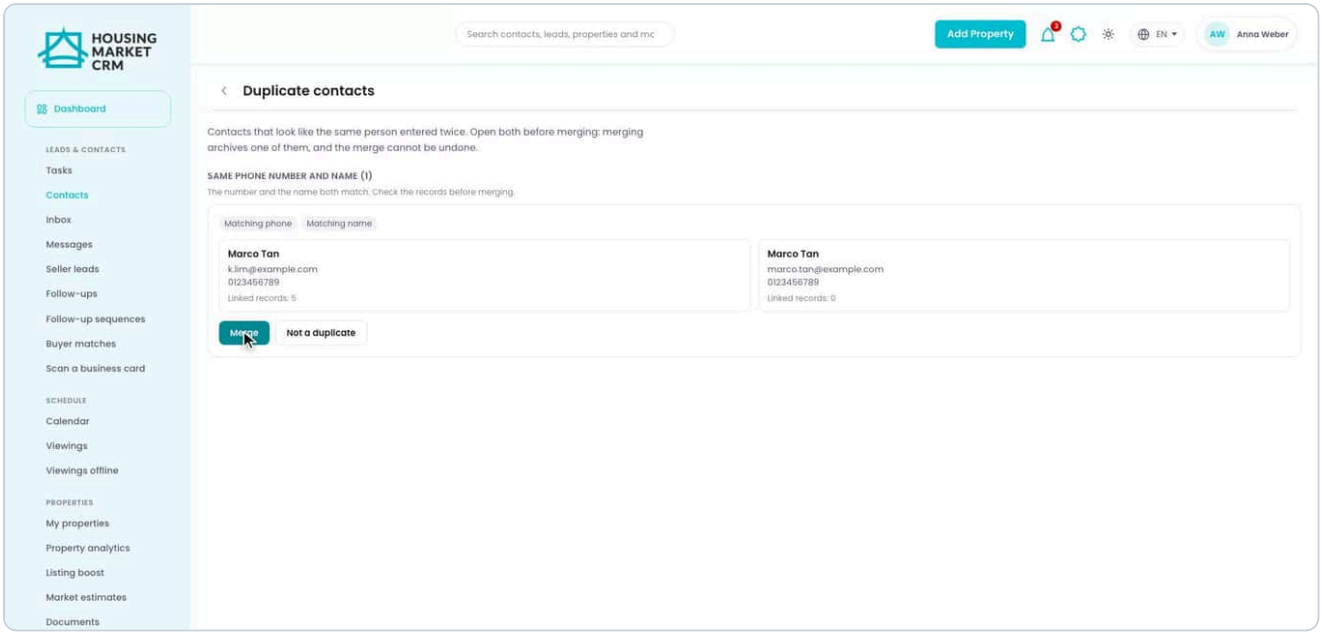


Figure 28.9 · Screen recorded 8 October 2026

RELATED HELP CENTER ARTICLES

What happens when I delete a contact, a lead or a colleague?	faq.housingmarketgroup.com/faq/what-happens-when-i-delete-a-contact-a-lead-or-a-colleague

29 CHAPTER 29

Your follow-ups list

All plans | For agents | Watch the video

OVERVIEW

Yes. A follow-up reminds you when it falls due, unless you untick "Remind me when it is due", and the CRM notifies you again if it is still open a day later.

Give a follow-up a due date and time. "Remind me when it is due" starts ticked: leave it and you are notified at that moment; untick it and there is no due notification. Either way, a follow-up still open a day after its due time raises an overdue notification. Each fires exactly once rather than repeating until it is dealt with. There is no reminder ahead of the due time; to hear about it earlier, set the due time earlier.

Notifications are set per event rather than with one switch for all of them: a new enquiry, a lead assigned to you, a lead that has gone quiet, a follow-up due or overdue, a viewing coming up, a listing published or refused. Each can be in the CRM, by email, both or off, and can arrive as it happens or once a day as a summary. Set them under Settings (the gear) → Notification preferences.

From the Help Center: **Does the CRM include reminders?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

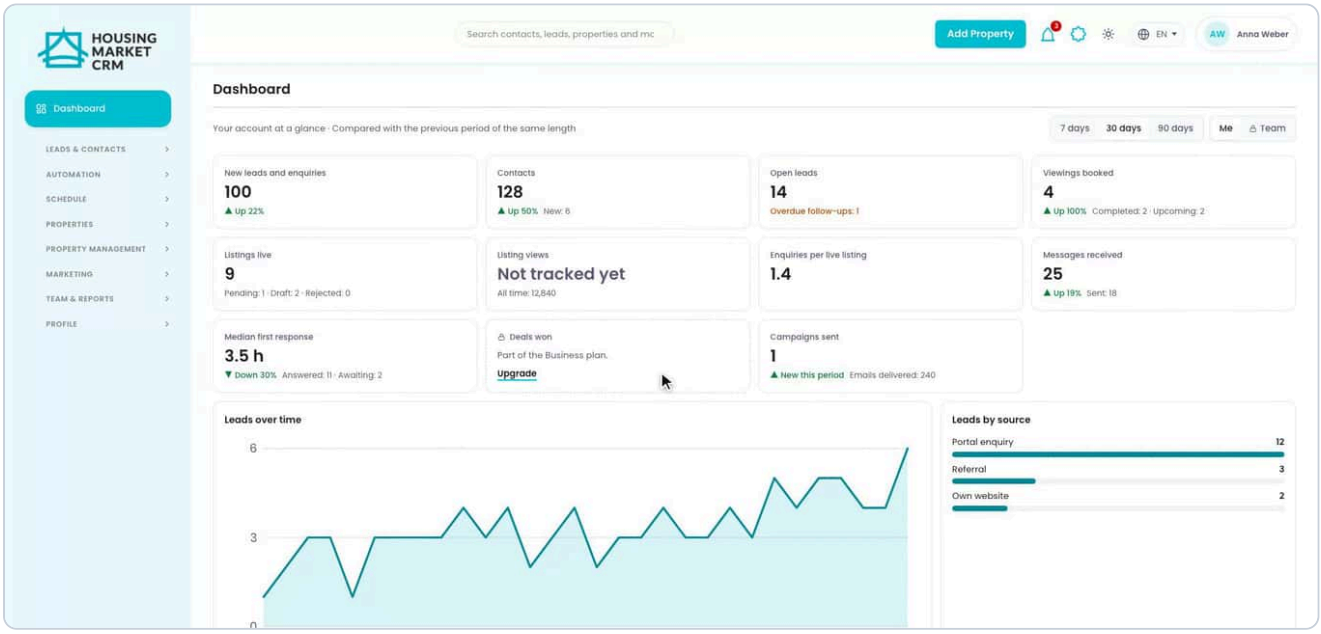


Figure 29.1 · Screen recorded 23 October 2026

2 Open **Leads & contacts** in the left menu.

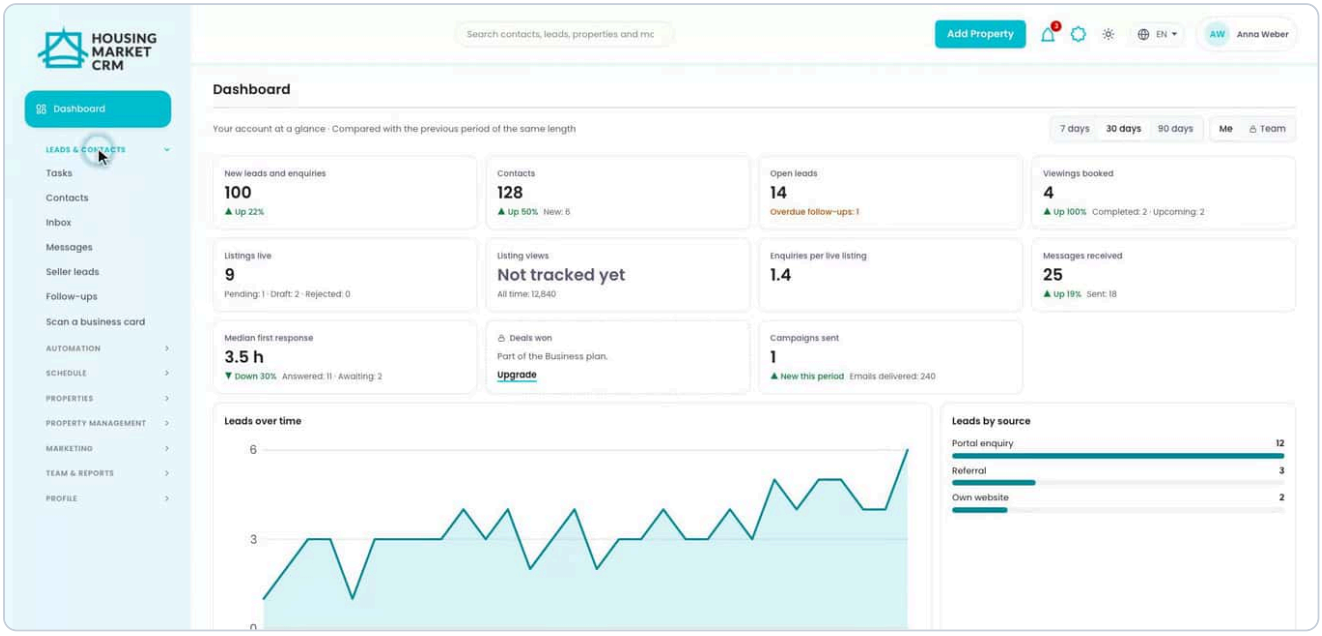


Figure 29.2 · Screen recorded 23 October 2026

3 Click **Follow-ups**.

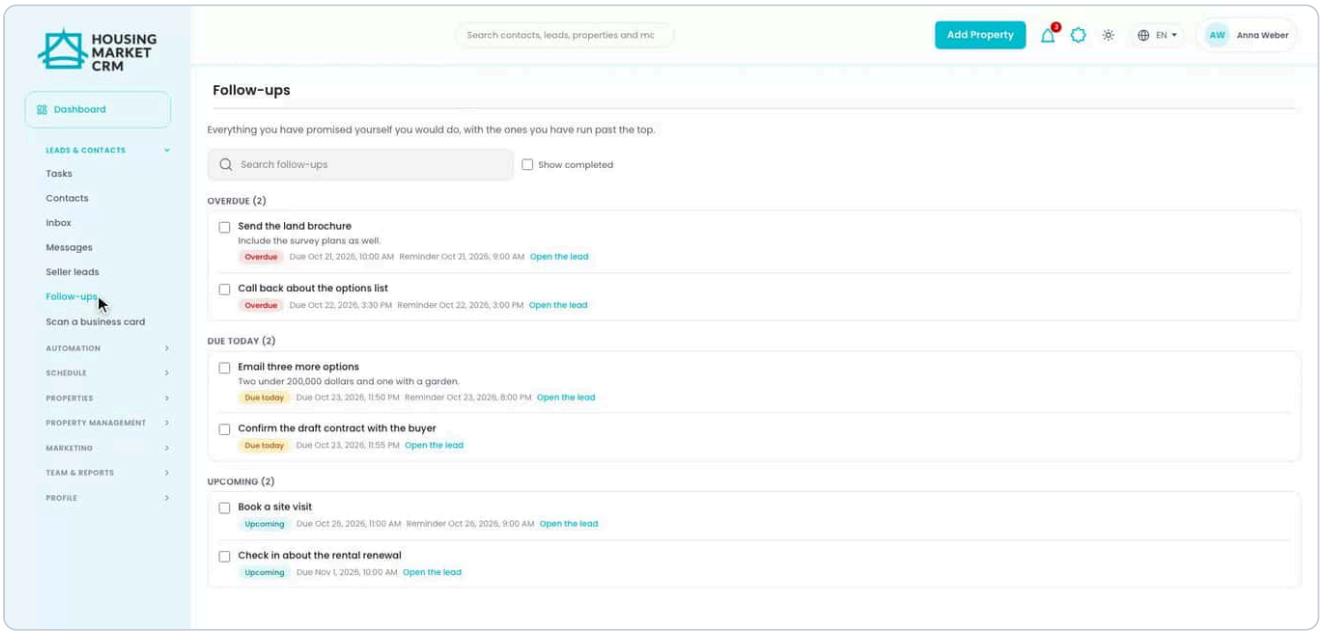


Figure 29.3 · Screen recorded 23 October 2026

4 The **Overdue** group comes first: these have slipped past their date.

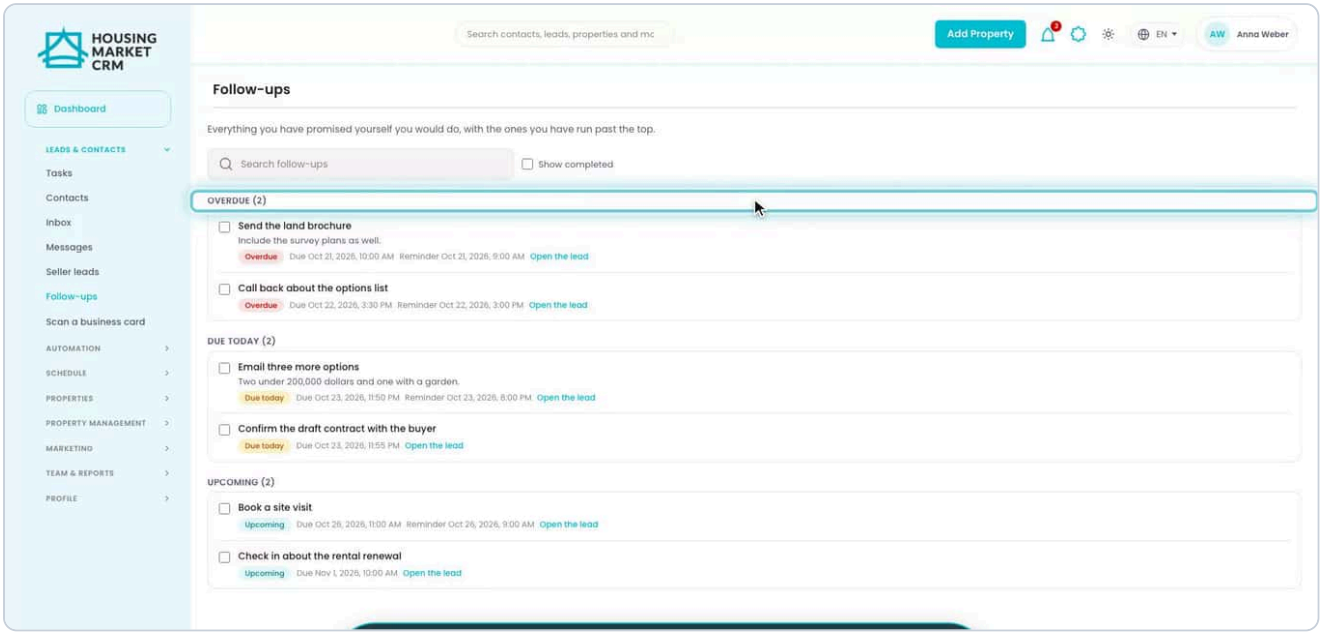


Figure 29.4 · Screen recorded 23 October 2026

5 **Due today** is next.

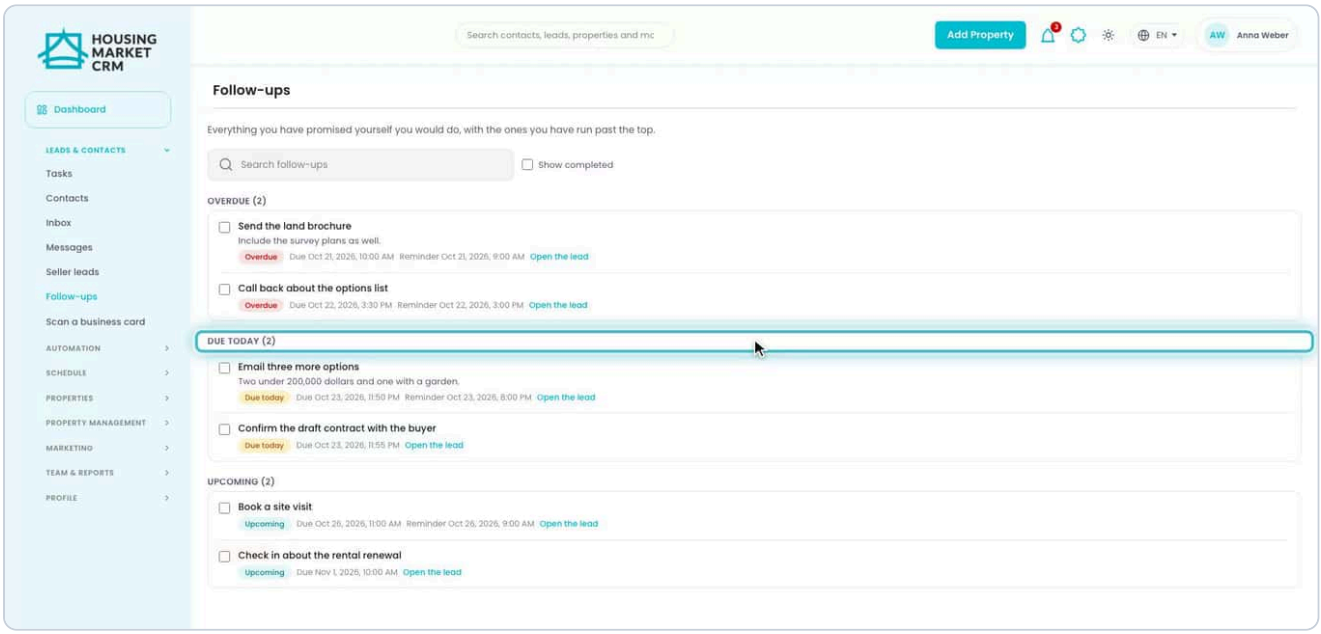


Figure 29.5 · Screen recorded 23 October 2026

6 Then everything **upcoming**.

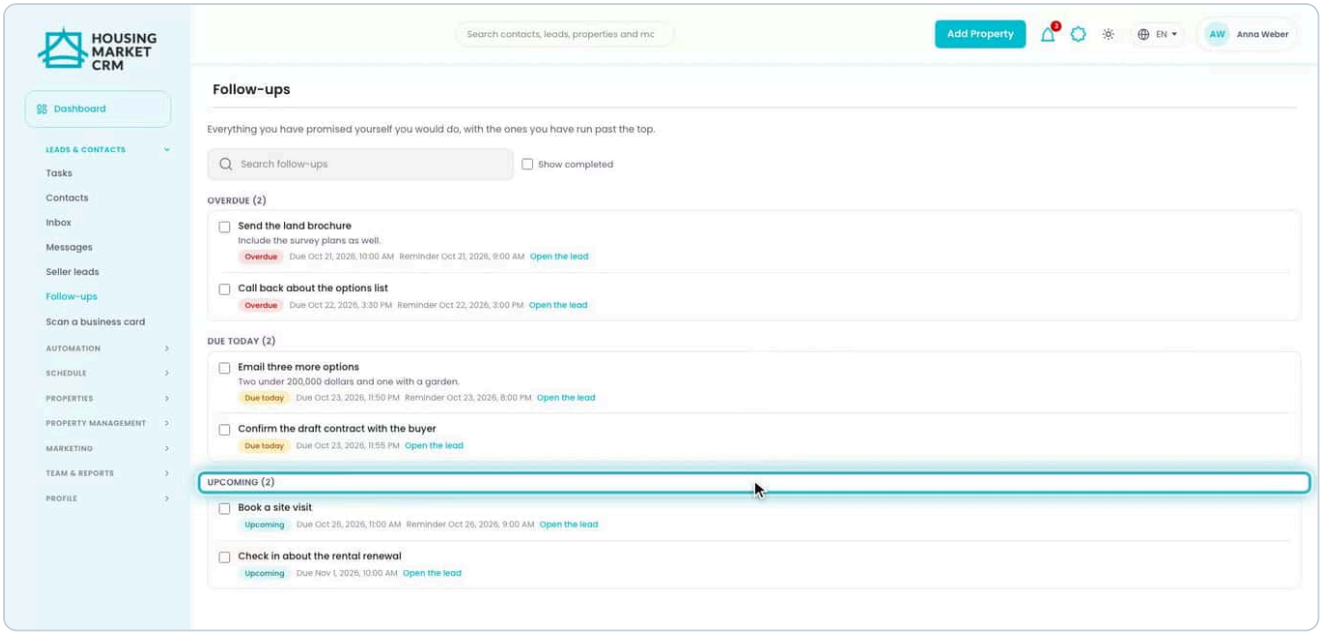


Figure 29.6 · Screen recorded 23 October 2026

7 Type a word to **search** your follow-ups.

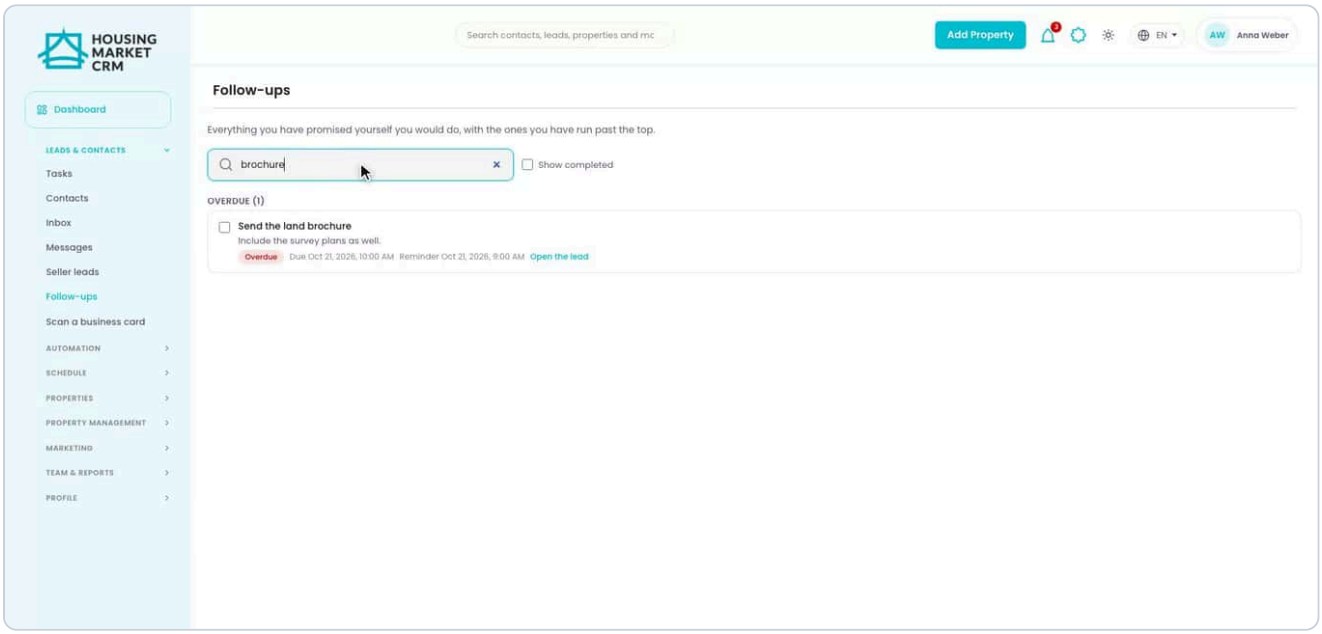


Figure 29.7 · Screen recorded 23 October 2026

8 Only the matching follow-up is left.

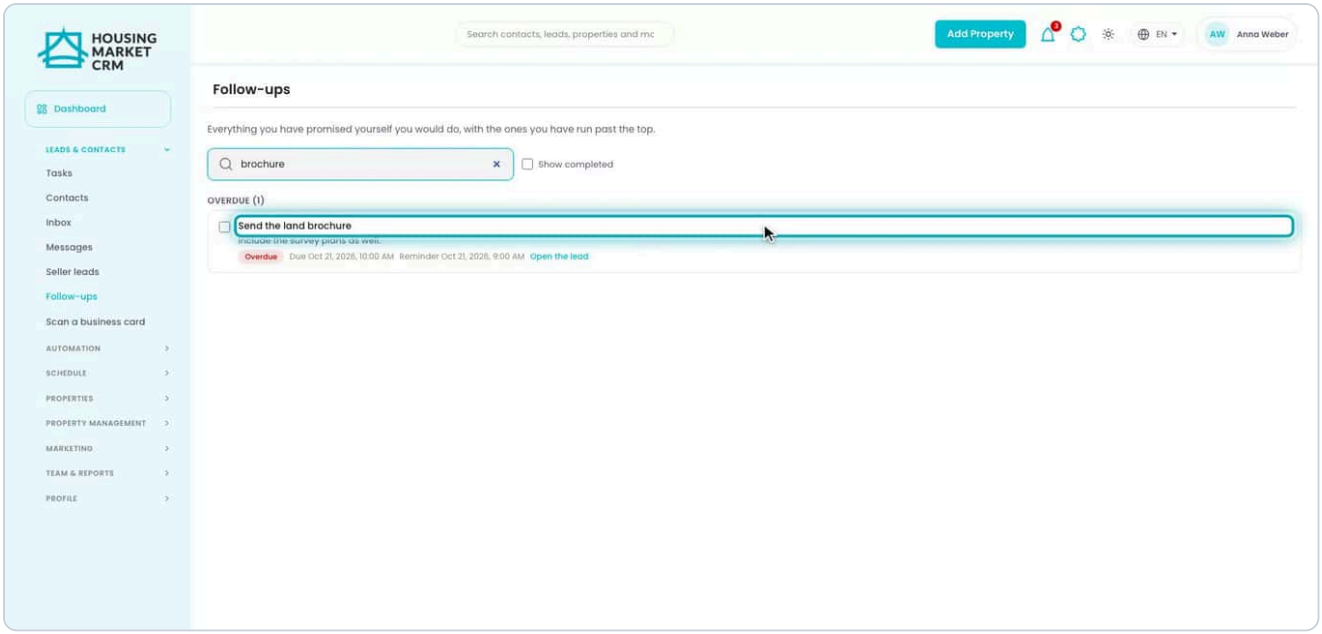


Figure 29.8 · Screen recorded 23 October 2026

9 **Open the lead** takes you to the lead it is about.

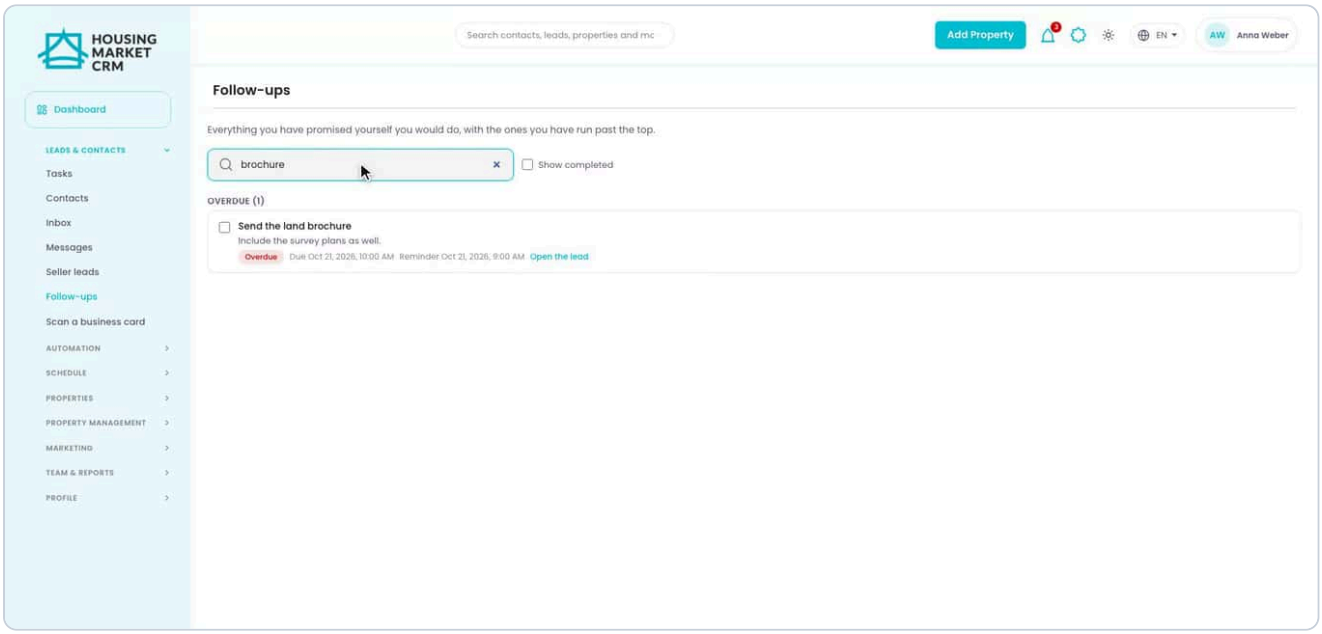


Figure 29.9 · Screen recorded 23 October 2026

10 Clear the search to see everything again.

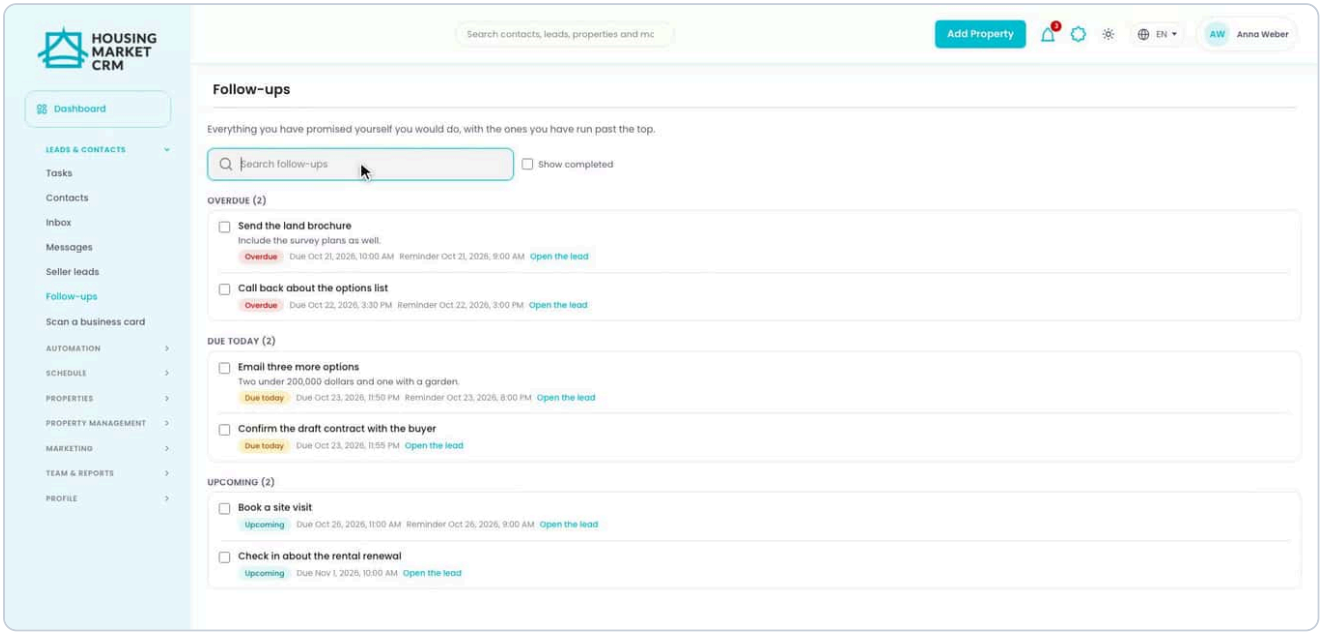


Figure 29.10 · Screen recorded 23 October 2026

11 Tick a follow-up when it is **done**.

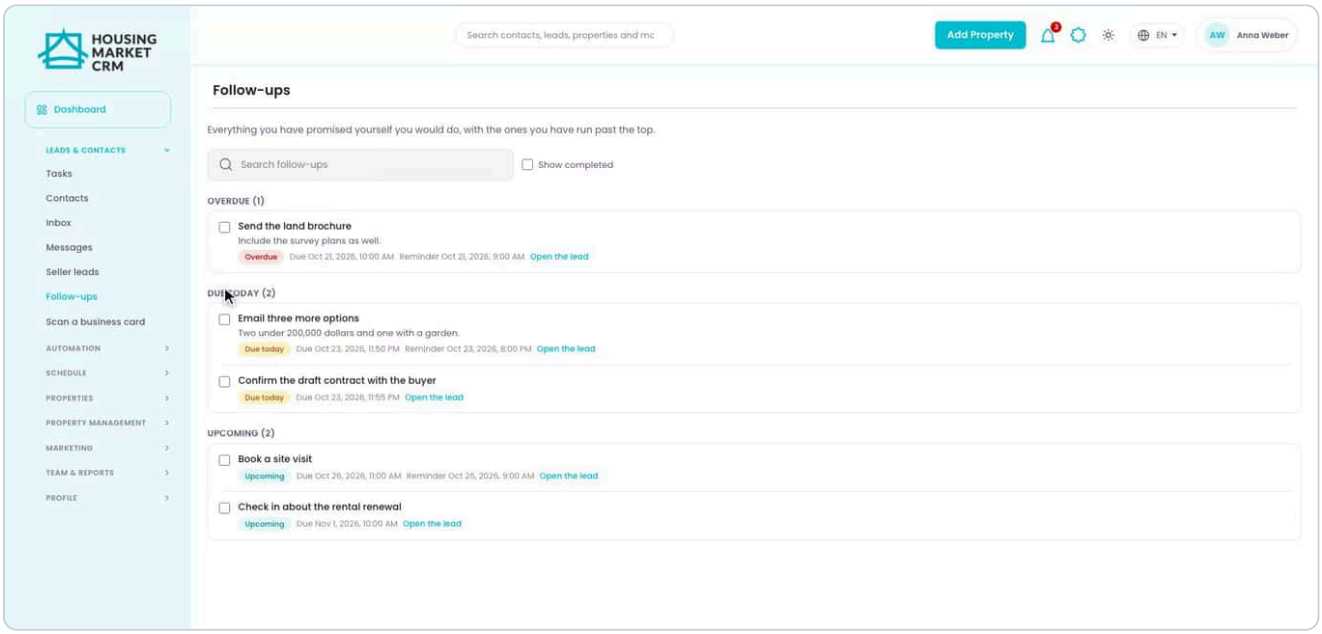


Figure 29.11 · Screen recorded 23 October 2026

12 Switch on **Show completed** to see what you have finished.

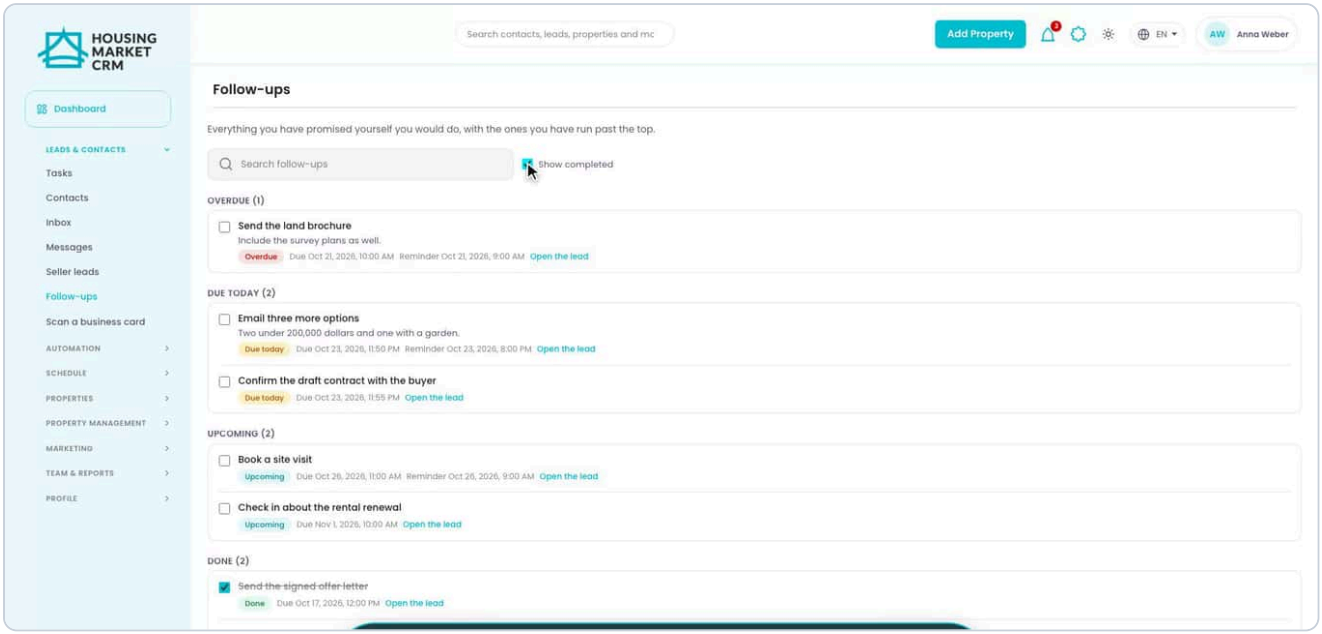


Figure 29.12 · Screen recorded 23 October 2026

13 Completed follow-ups sit in their own **Done** group.

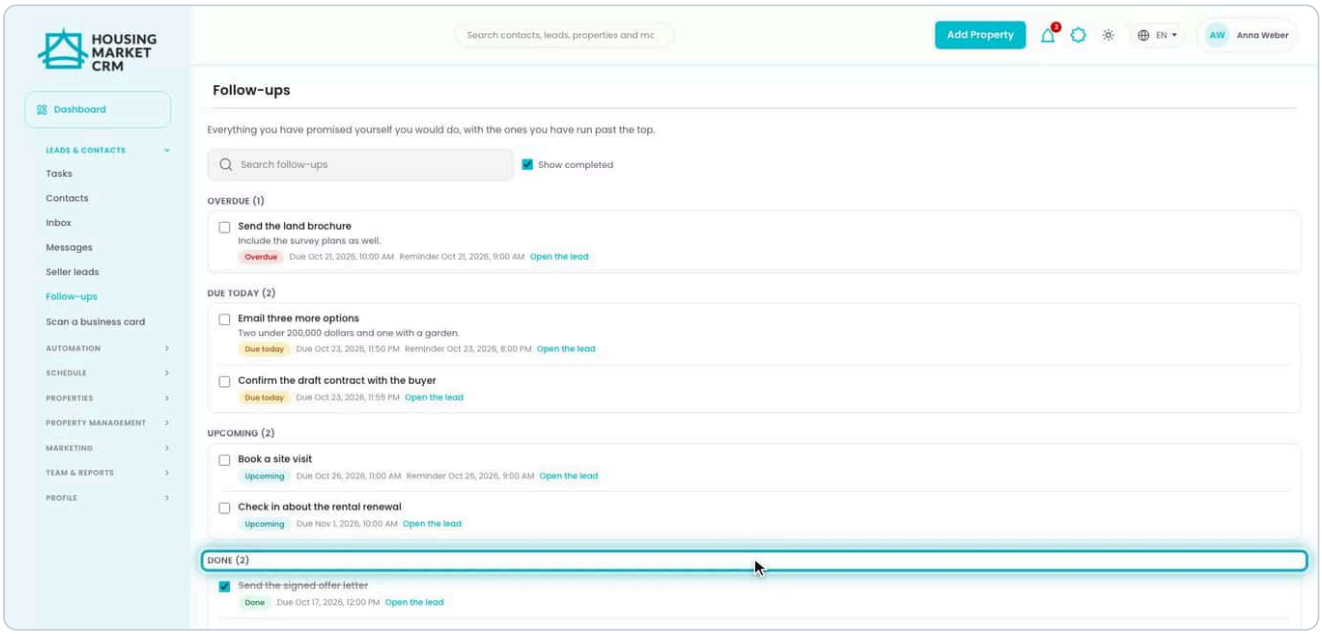


Figure 29.13 · Screen recorded 23 October 2026

14 Ticked by mistake? Tick it again to **reopen** it.

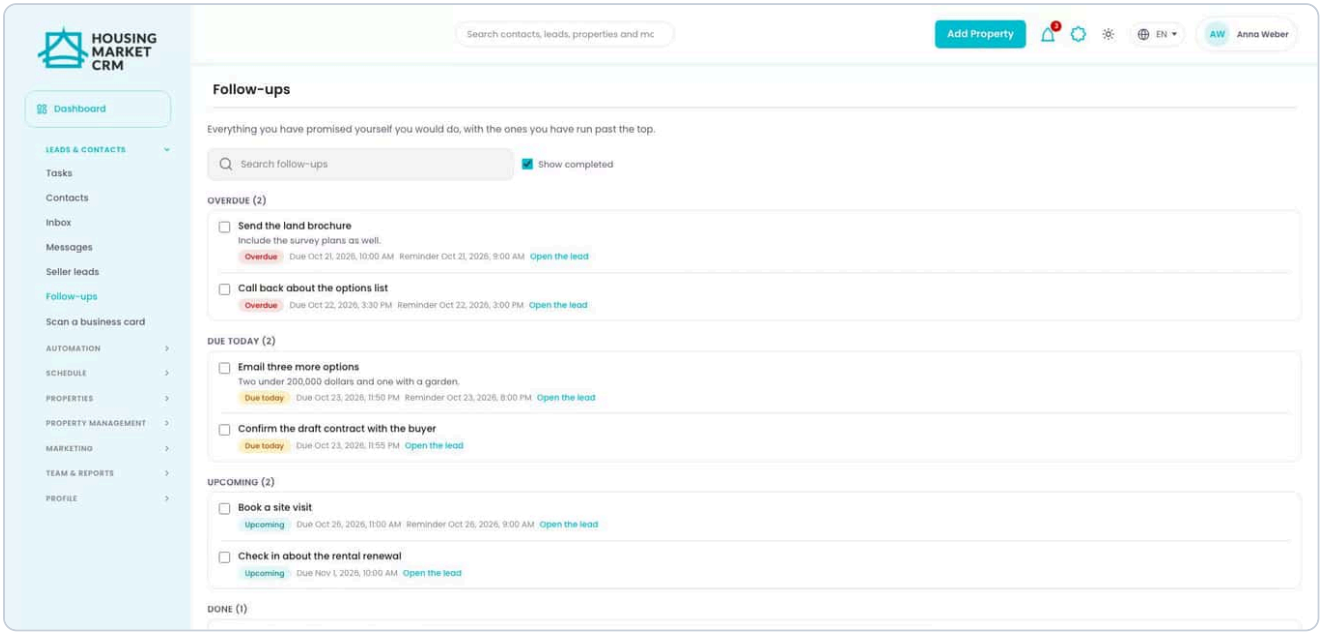


Figure 29.14 · Screen recorded 23 October 2026

RELATED HELP CENTER ARTICLES

Can I create tasks?	faq.housingmarketgroup.com/faq/can-i-create-tasks
What are follow-up sequences?	faq.housingmarketgroup.com/faq/what-are-follow-up-sequences

30 CHAPTER 30

Log a call on a contact

All plans | For agents | Watch the video

OVERVIEW

Open the contact, find the Calls panel, choose what happened, enter the minutes and what was said, and choose Log call. The call is saved on the contact with its date and length. Logging is free on every plan.

Open Contacts in the left menu and open the person you phoned. Scroll to the Calls panel. Calls you logged before are listed there, so you can see at a glance when you last spoke.

To record a new one, choose the outcome: Spoke to them, Left a voicemail, No answer or Wrong number. Enter how many minutes the call took and write down what was said, then choose Log call. The call is saved on the contact with the date and the length.

Log the calls nobody picked up too. A line saying No answer or Left a voicemail tells you, and anyone on your team who opens the contact, who still has to be called back.

Logging a call by hand is free on every plan. Where calling from inside the CRM is switched on, the Call now button is part of Pro, and on other plans you can still log calls by hand.

From the Help Center: **How do I log a call on a contact?**

STEP BY STEP

1 Open **Contacts** in Housing Market CRM.

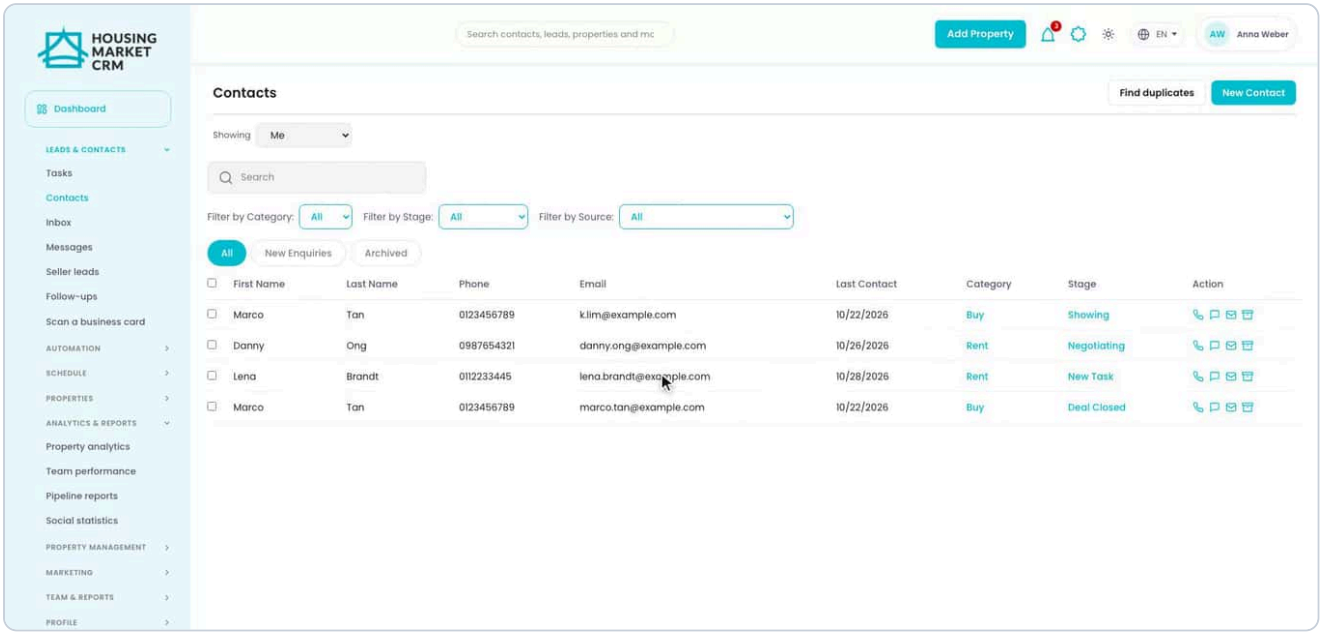


Figure 30.1 · Screen recorded 28 October 2026

2 Open the **contact** you just phoned.

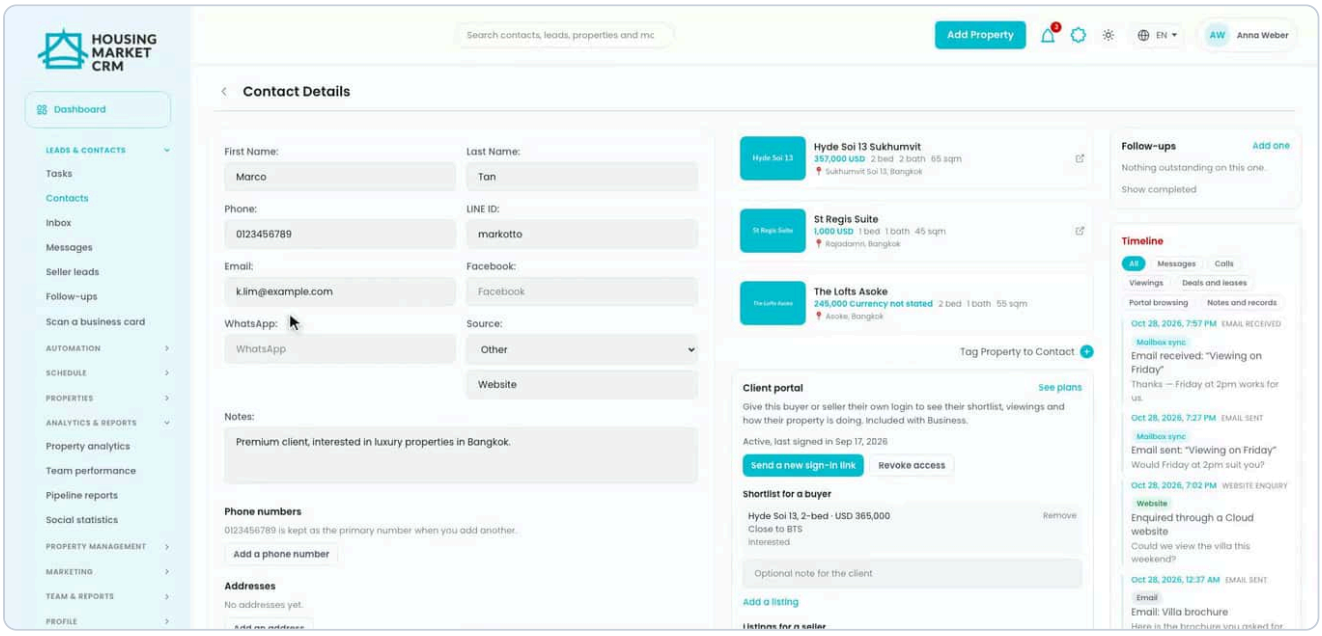


Figure 30.2 · Screen recorded 28 October 2026

3 Scroll to the **Calls** panel.

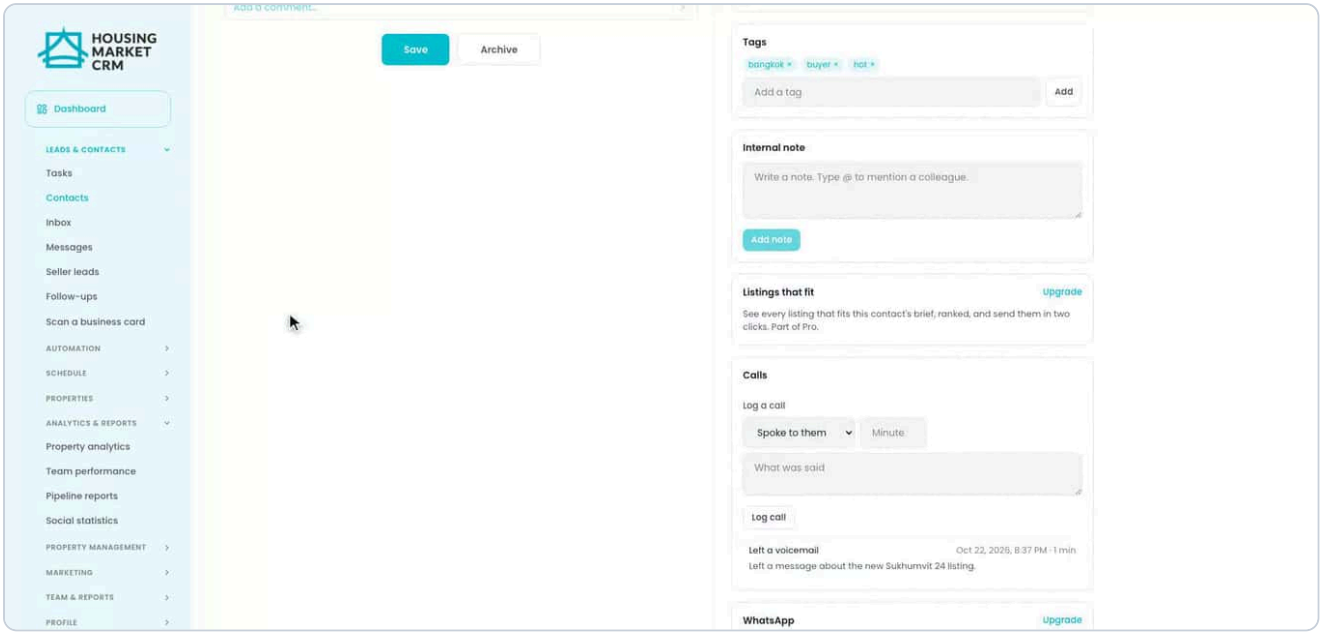


Figure 30.3 · Screen recorded 28 October 2026

4 Calls you logged before are listed here.

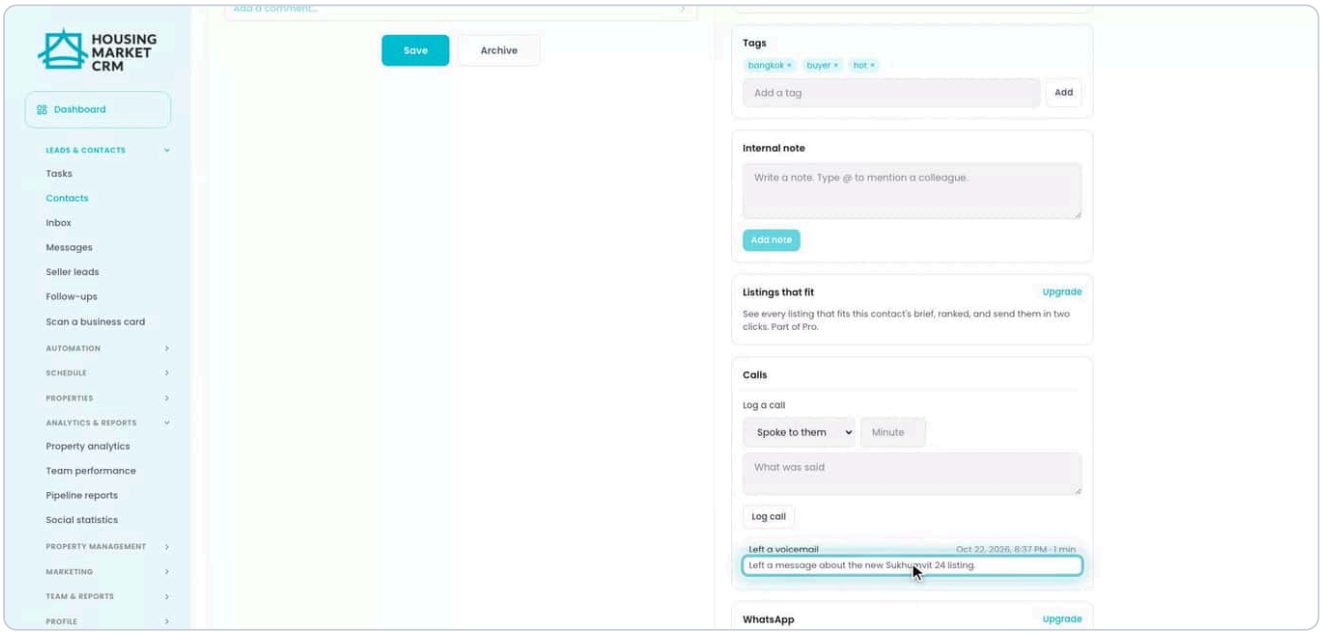


Figure 30.4 · Screen recorded 28 October 2026

5 Choose the **outcome**: here, **Spoke to them**.

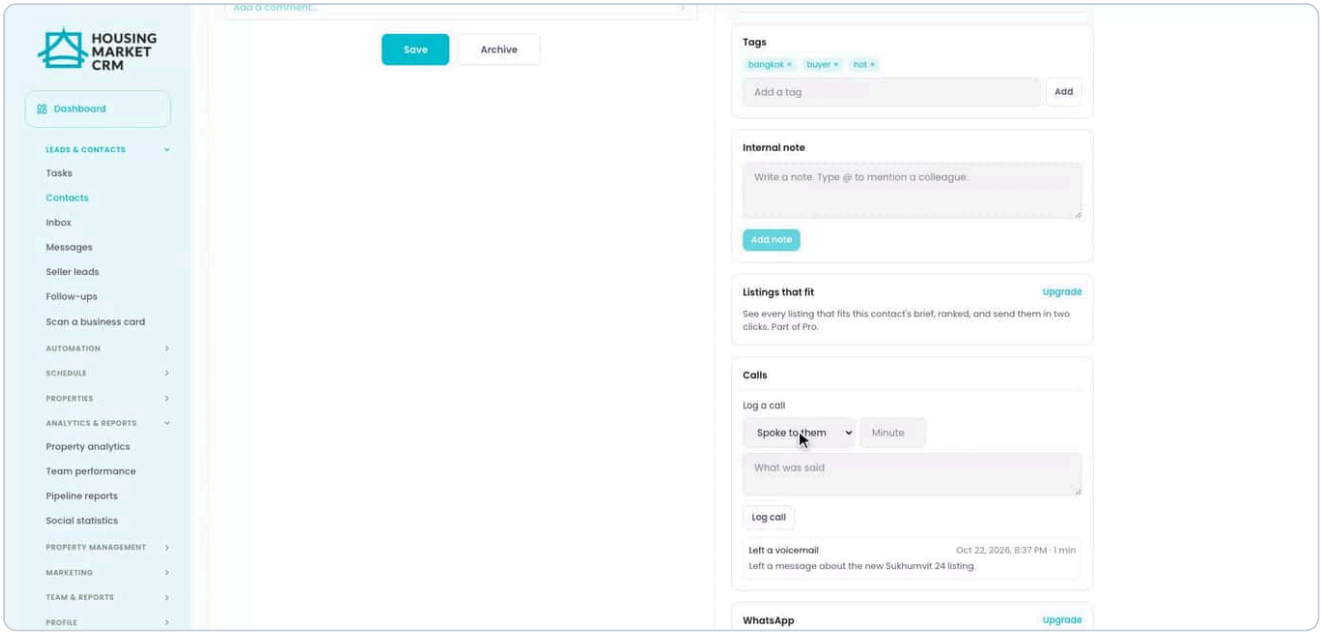


Figure 30.5 · Screen recorded 28 October 2026

6 Enter how many **minutes** it took.

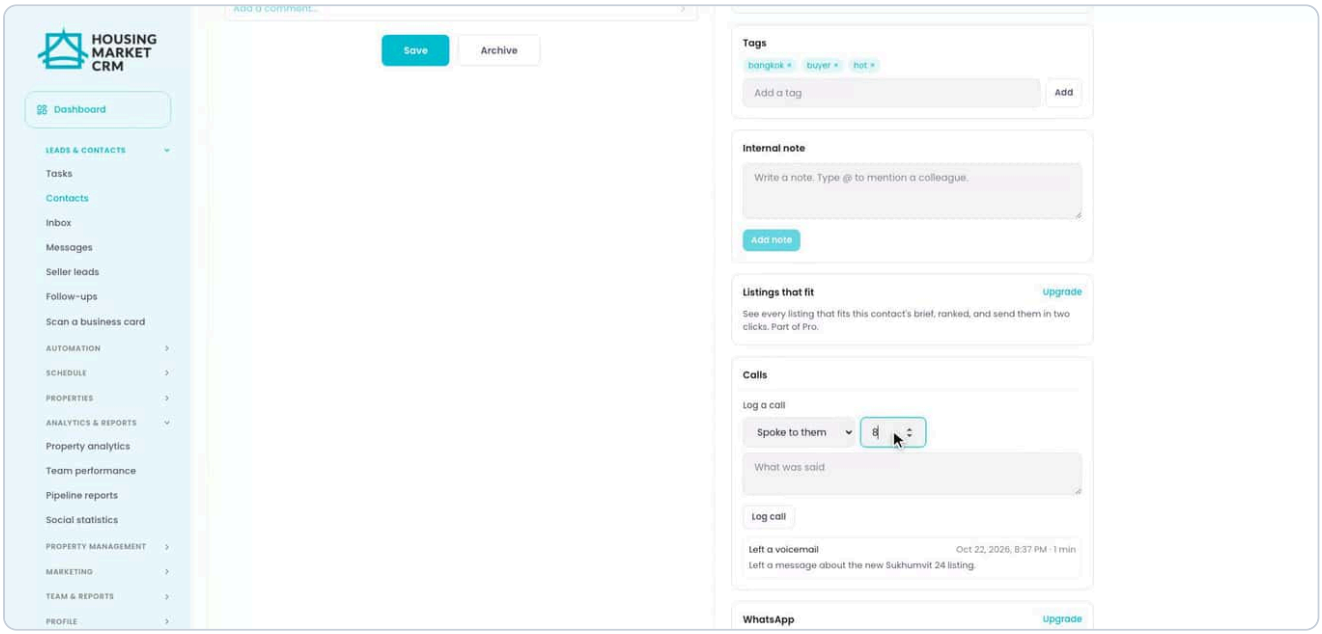


Figure 30.6 · Screen recorded 28 October 2026

7 Write down **what was said**.

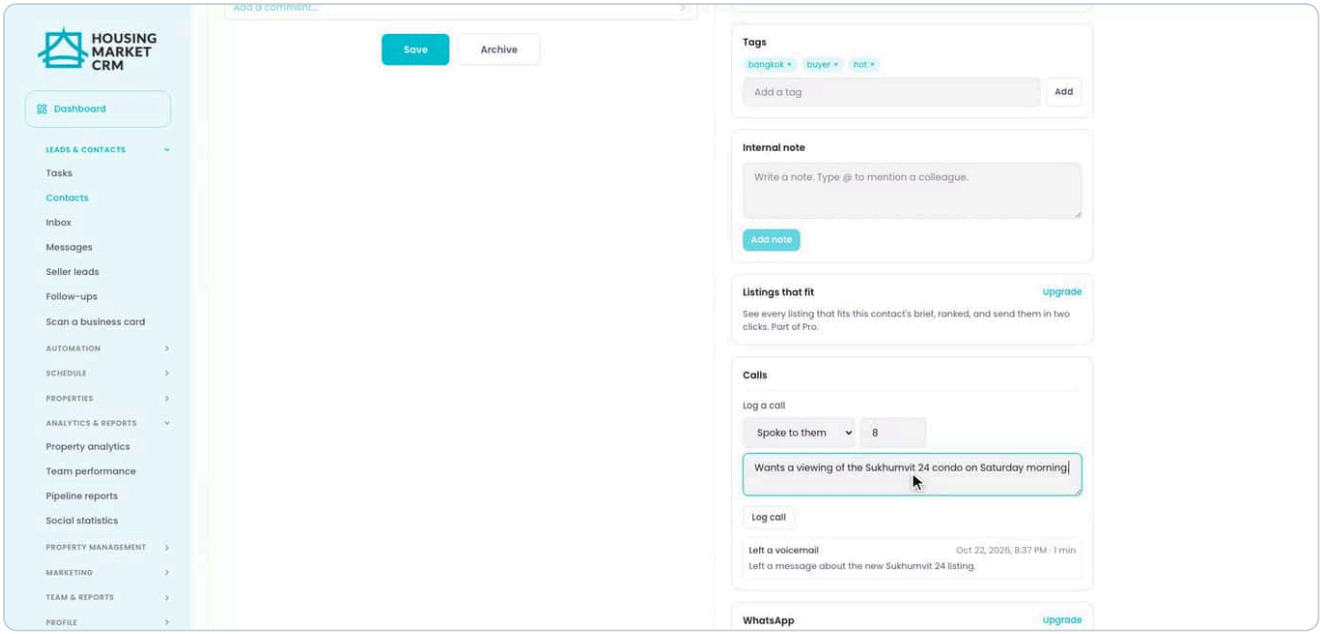


Figure 30.7 · Screen recorded 28 October 2026

8 Click **Log call**.

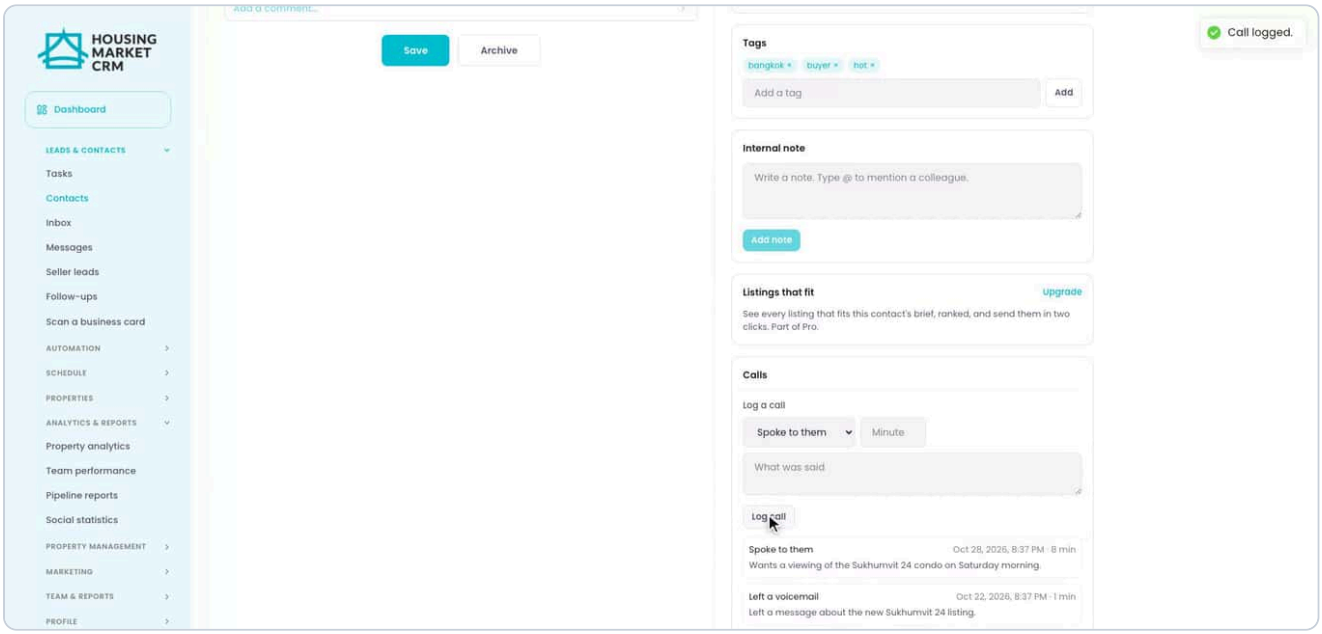


Figure 30.8 · Screen recorded 28 October 2026

9 The call is saved on the contact, with the **date and length**.

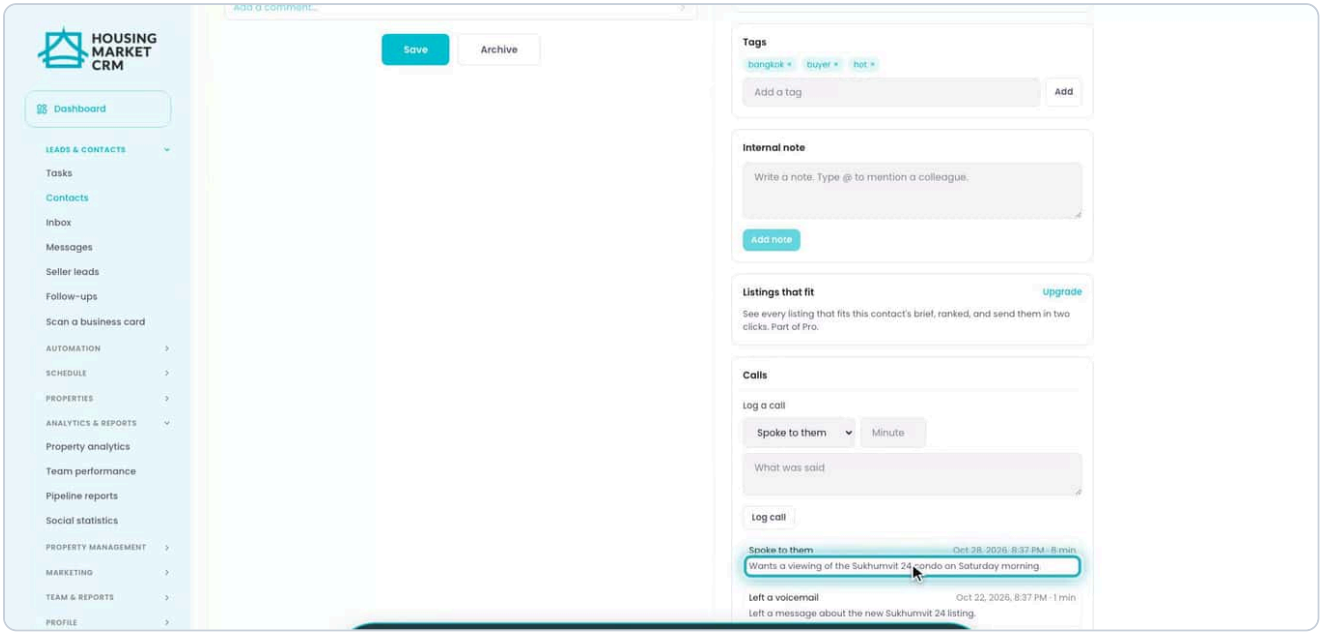


Figure 30.9 · Screen recorded 28 October 2026

10 No answer or a voicemail? Log those too, so you know **who to call back**.

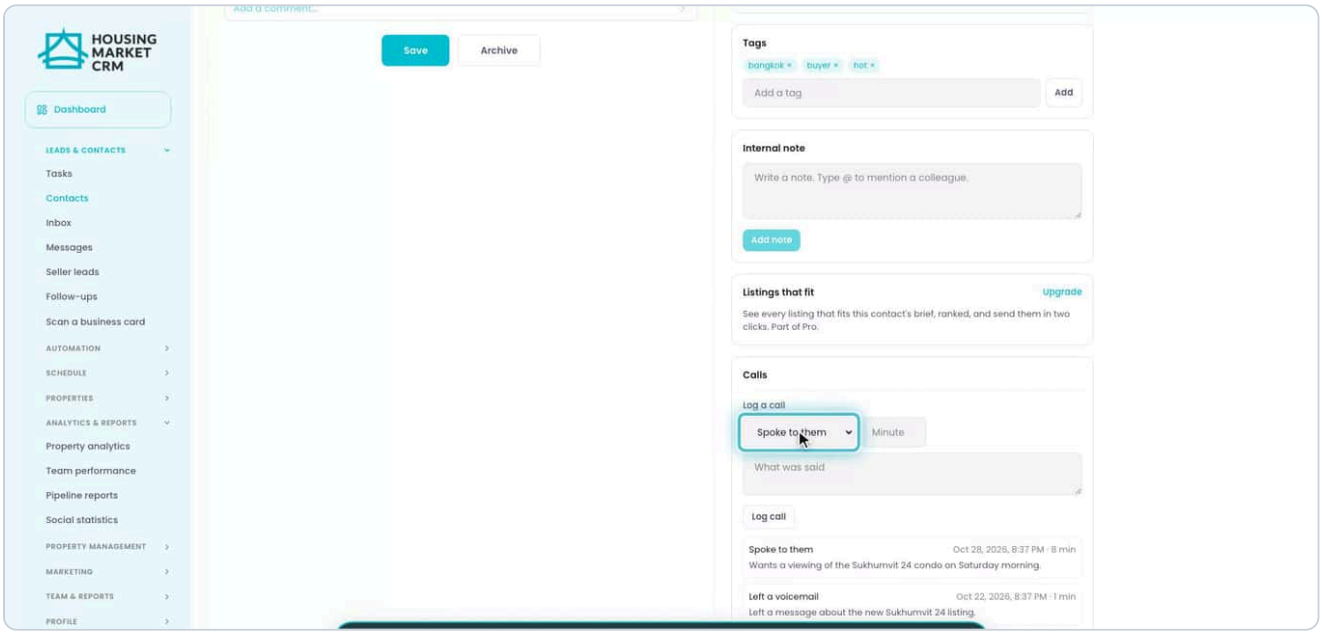


Figure 30.10 · Screen recorded 28 October 2026

11 Logging calls is **free on every plan**.

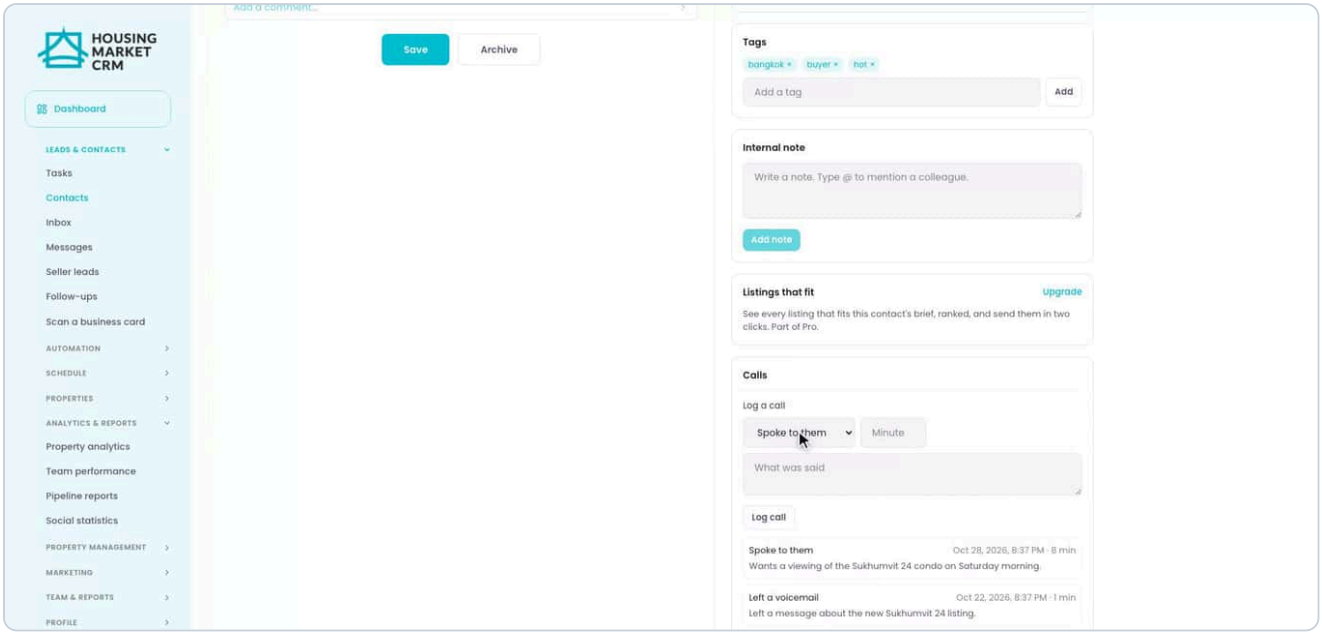


Figure 30.11 · Screen recorded 28 October 2026

31 CHAPTER 31

Fix an email address that bounced

All plans | For agents | Watch the video

OVERVIEW

Emails to that address came back undelivered. Check the spelling, correct the email address on the contact and save it, or ask the person for another address.

When you see Could not deliver beside a contact's email address, emails to that address have bounced: they came back undelivered. The address is usually mistyped, for example example.com written as exmaple.com, or it no longer exists.

Correct the address

- Open the contact and compare the address with the one the person gave you.
- Click the Email field, type the right address and choose Save.
- Once a new address is saved, the label is gone.

If the address is right and still bounces, ask the person for another address, or phone them. Correcting the address clears the label.

To see how addresses that bounced are kept out of your campaigns, read "How do I send an email campaign to my contacts?".

From the Help Center: **What does Could not deliver mean on a contact?**

STEP BY STEP

1 Open **Contacts** in Housing Market CRM.

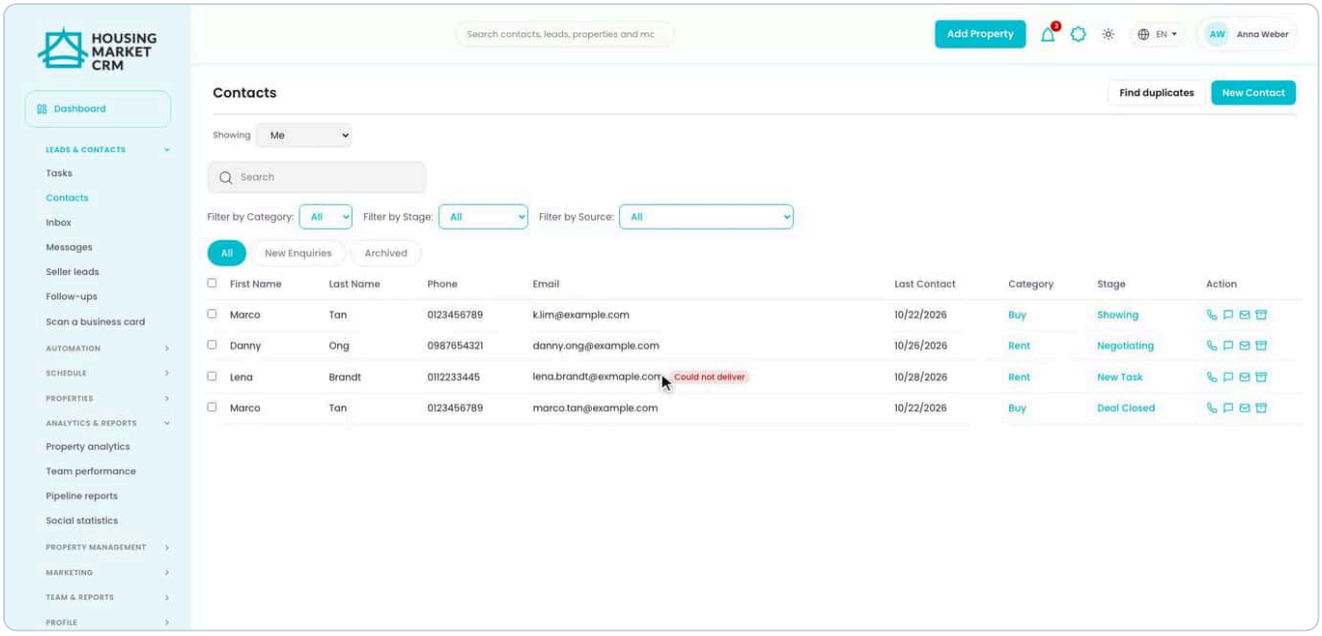


Figure 31.1 · Screen recorded 28 October 2026

2 This contact shows **Could not deliver** beside the email address.

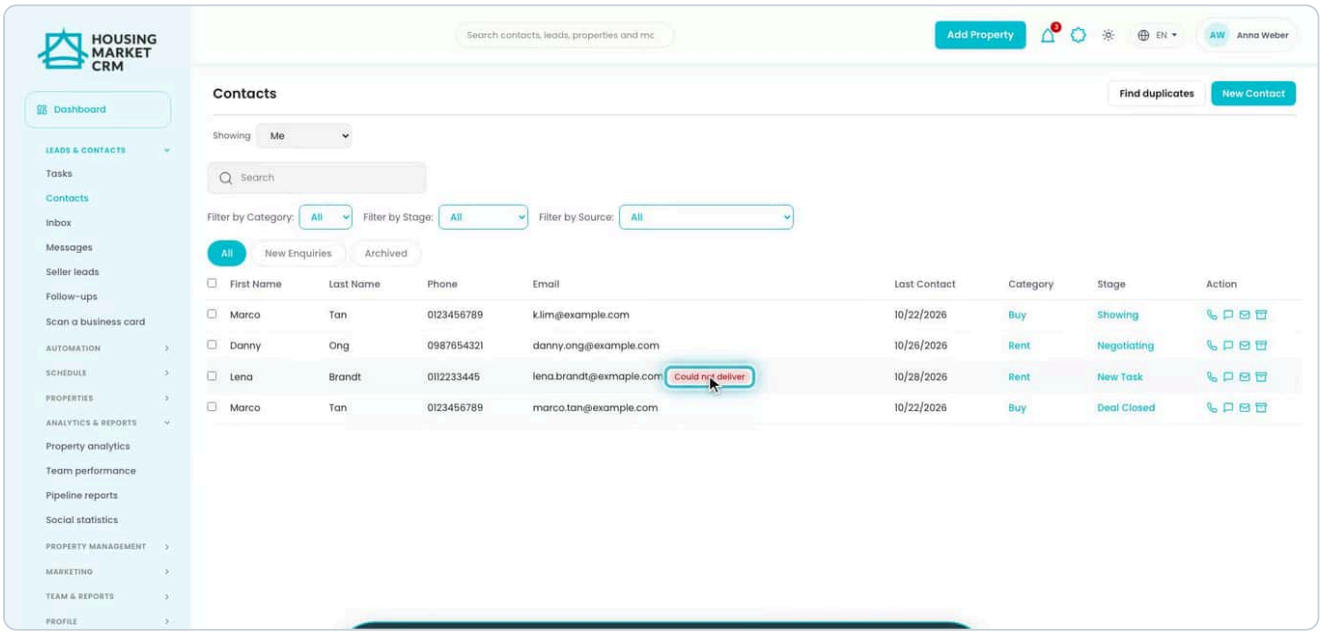


Figure 31.2 · Screen recorded 28 October 2026

3 Emails to this address **bounced**: they came back undelivered.

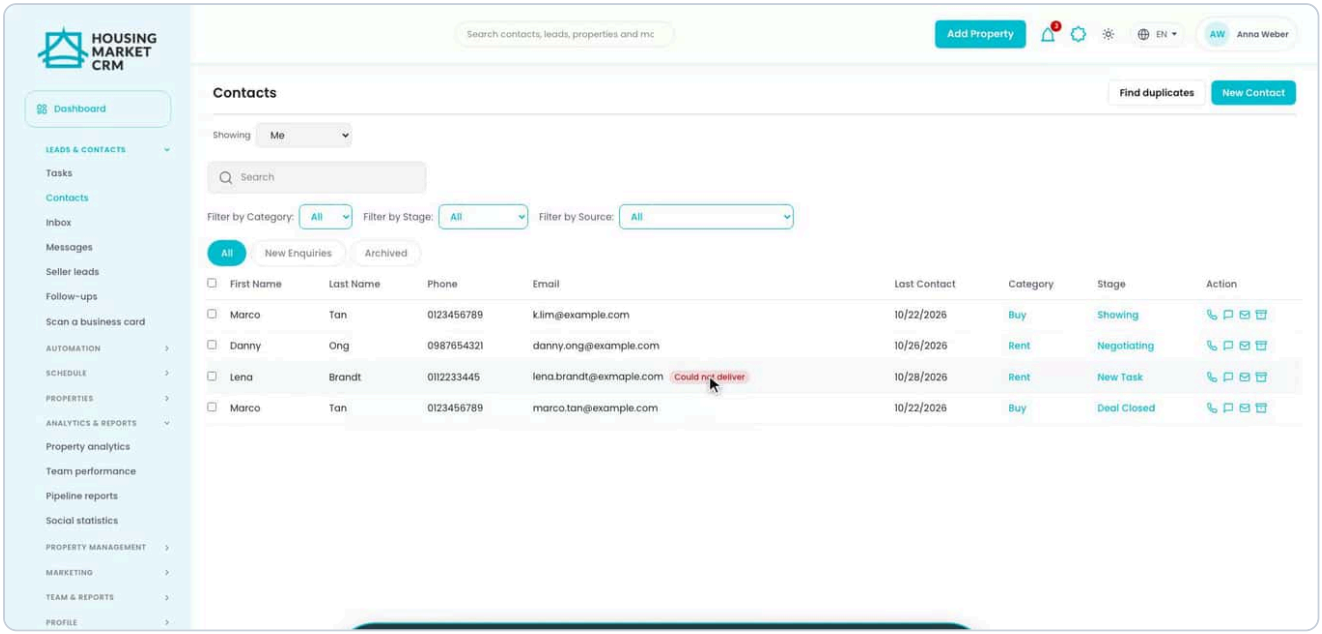


Figure 31.3 · Screen recorded 28 October 2026

4 Check the spelling: here **exmaple.com** should be **example.com**.

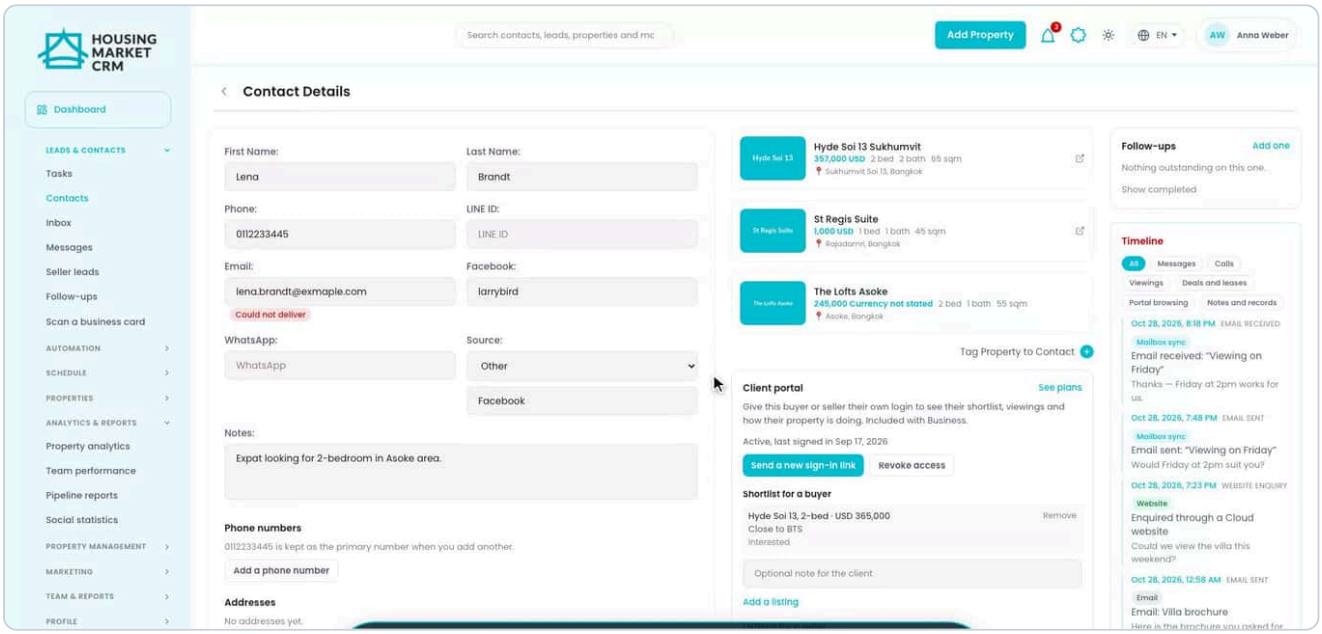


Figure 31.4 · Screen recorded 28 October 2026

5 Open the contact and click the **Email** field.

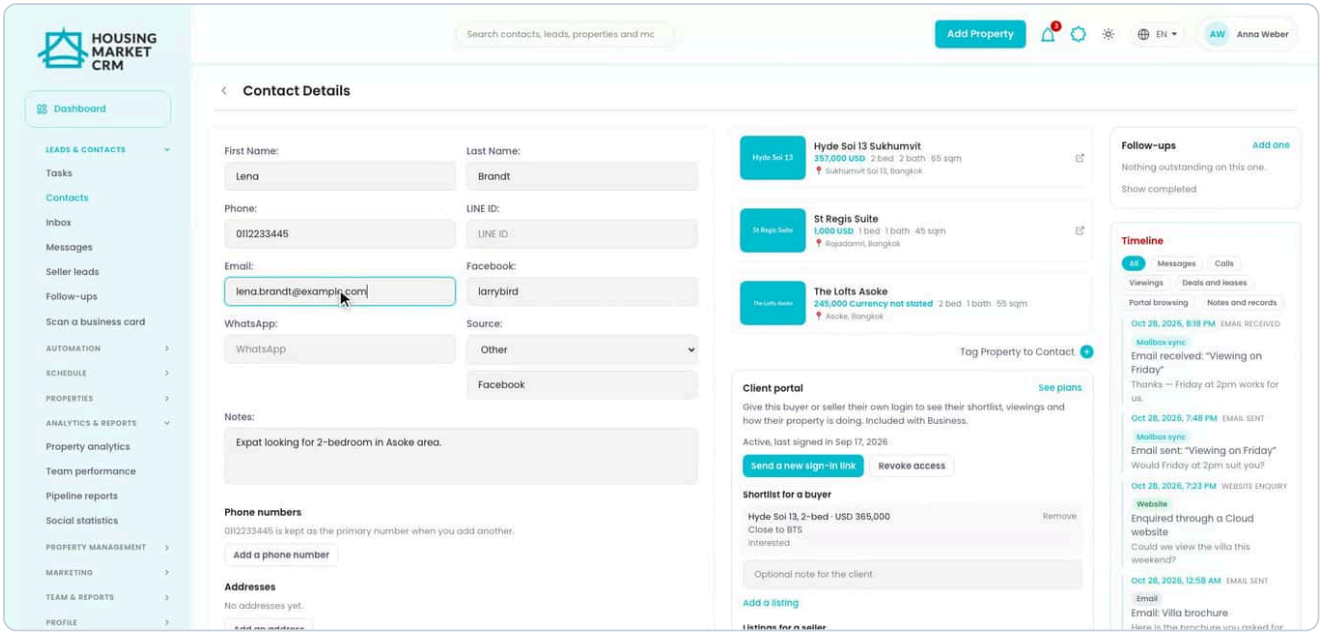


Figure 31.5 · Screen recorded 28 October 2026

6 Click **Save**.

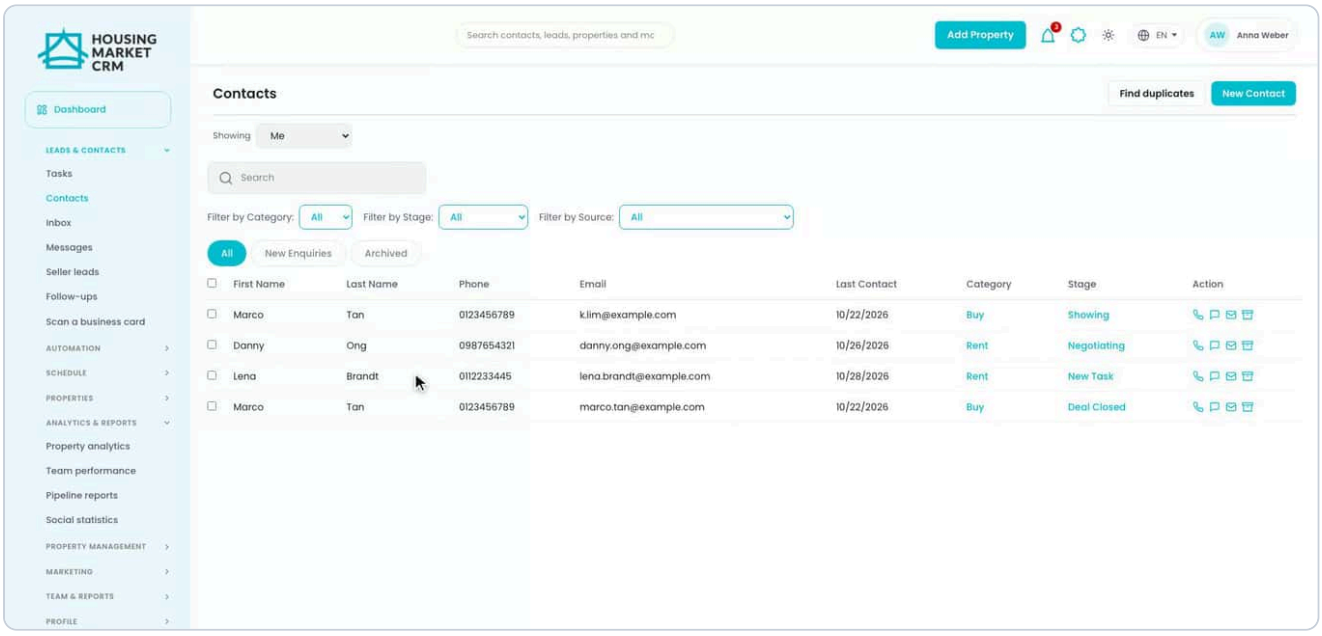


Figure 31.6 · Screen recorded 28 October 2026

7 With a new address saved, the **label is gone**.

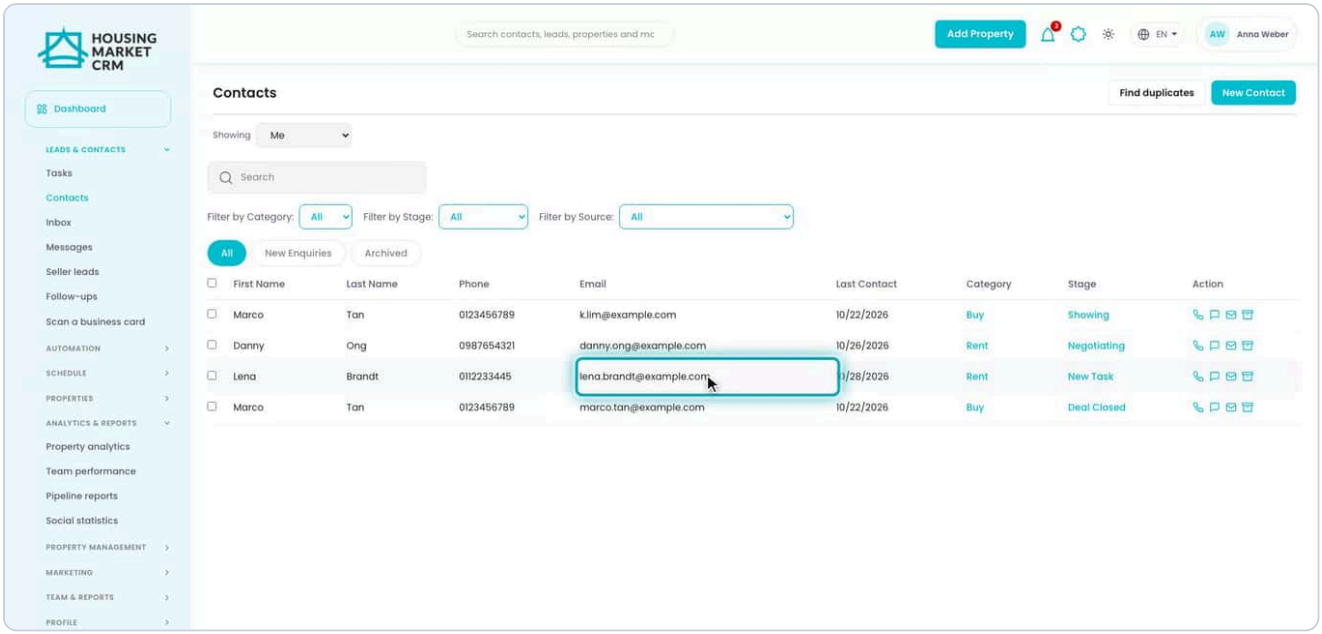


Figure 31.7 · Screen recorded 28 October 2026

8 Address right but still bouncing? Ask for **another address**, or call.

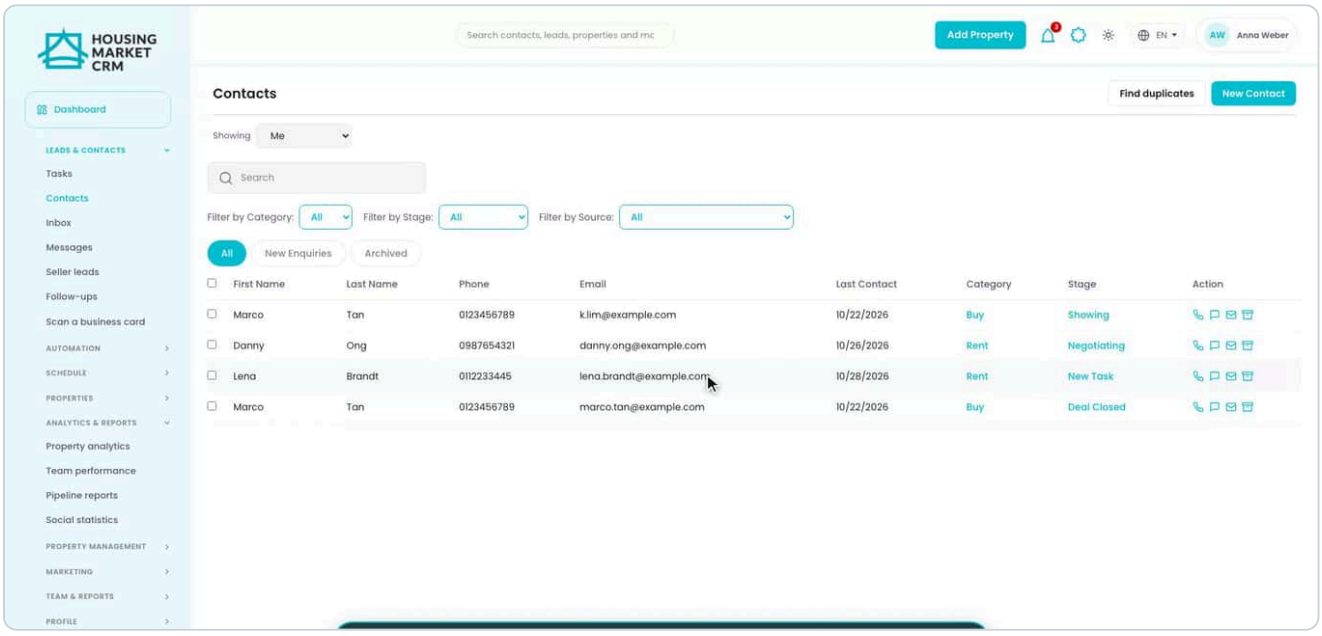


Figure 31.8 · Screen recorded 28 October 2026

32 CHAPTER 32

Relocation leads: read the requirements

All plans | For agents | Watch the video

TODO No Help Center article covers this task yet, so this chapter has no explanation. Write the article, then map it in packages/handbooks/src/products/crm.ts. (A lead whose source is Relocation enquiry shows a Relocation requirements panel: who is moving, buy or rent, where, budget, timeline and household size.)

STEP BY STEP

1 Open a lead whose source is **Relocation enquiry**.

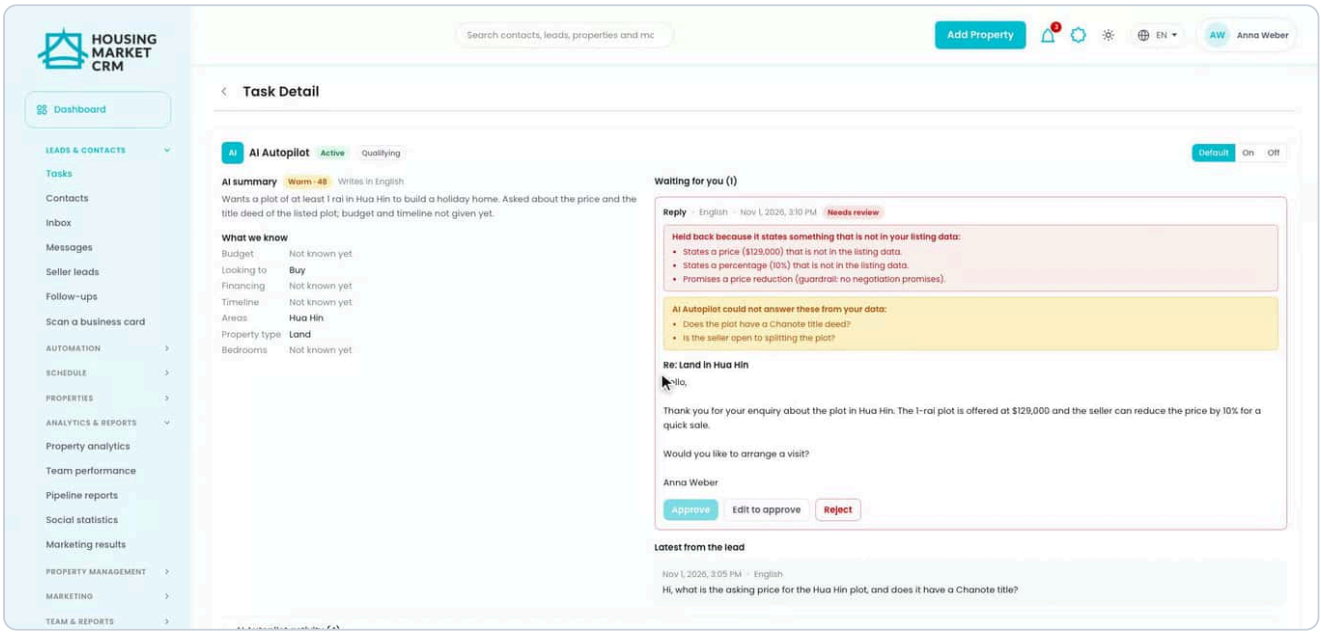


Figure 32.1 · Screen recorded 1 November 2026

2 The **Relocation requirements** panel.

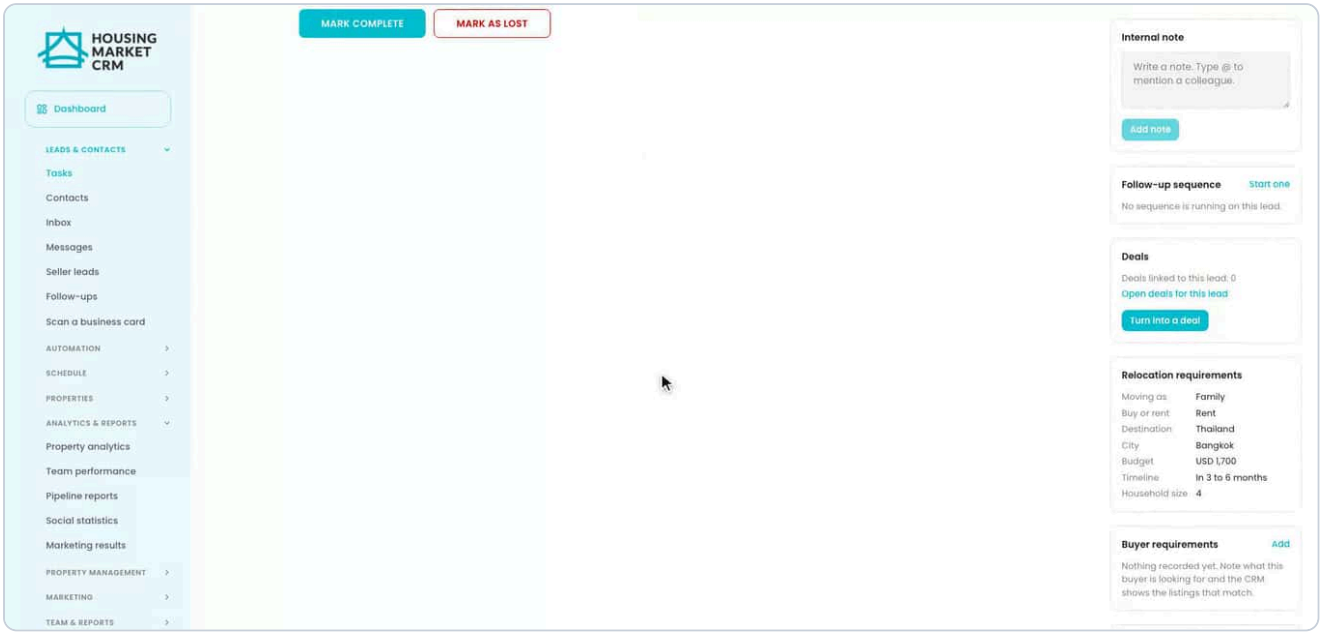


Figure 32.2 · Screen recorded 1 November 2026

3 Who is moving, **buy or rent**, and where.

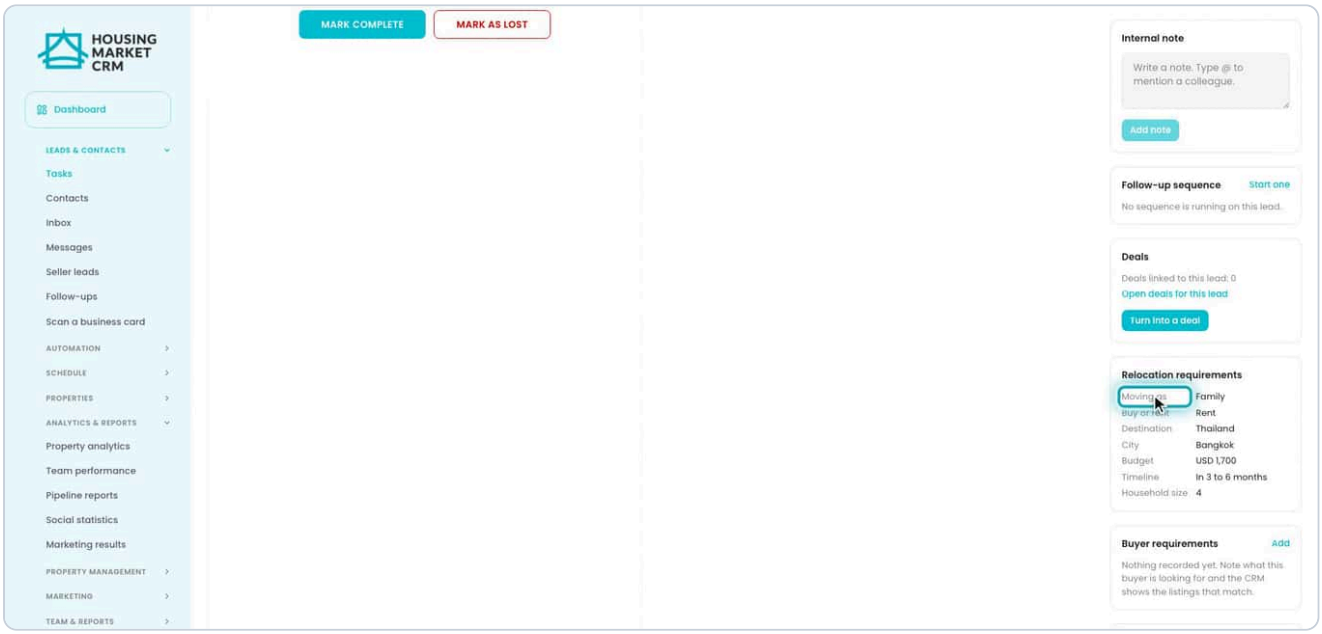


Figure 32.3 · Screen recorded 1 November 2026

4 Their **budget**, **timeline** and household size.

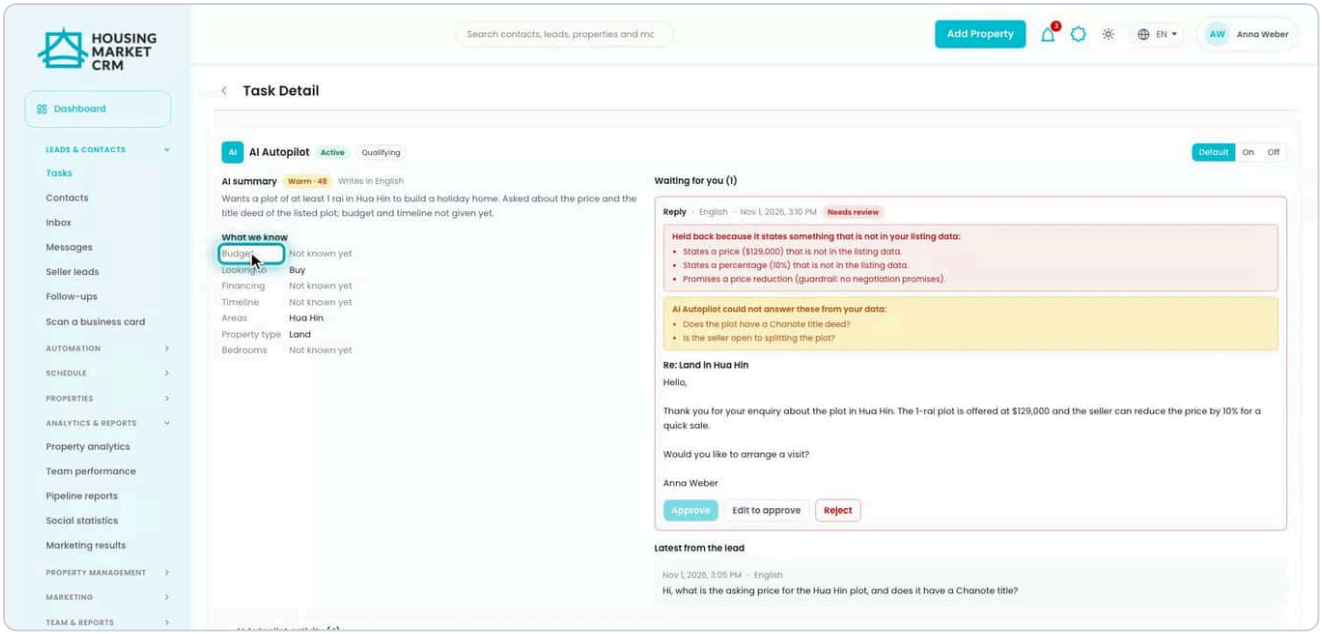


Figure 32.4 · Screen recorded 1 November 2026

5 Most of the first call, **answered already**.

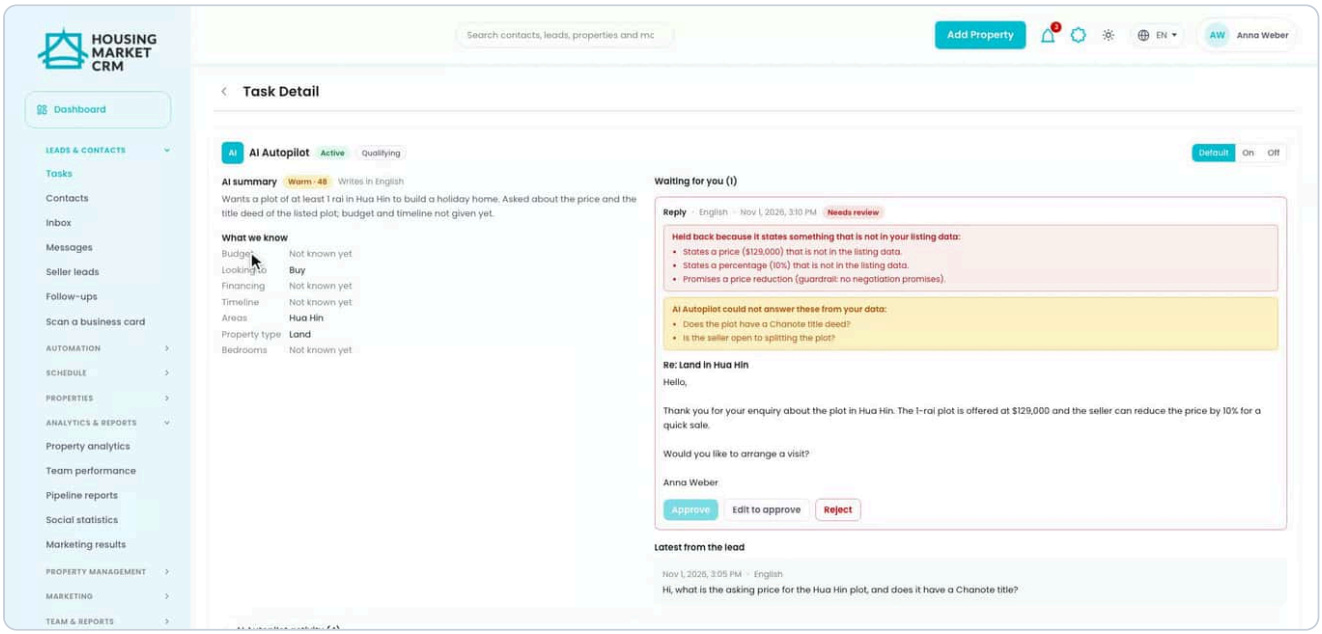


Figure 32.5 · Screen recorded 1 November 2026

RELATED HELP CENTER ARTICLES

How are leads added to the CRM?	faq.housingmarketgroup.com/faq/how-are-leads-added-to-the-crm
What can I do on a lead's page?	faq.housingmarketgroup.com/faq/what-can-i-do-on-a-leads-page

PART 3

Properties and listings

33 Manage your properties
34 Add a property
35 Publish a property to the portal
36 Your portal listings
37 Archive and restore a property
38 Property statistics
39 Bulk upload properties
40 The AI listing writer
41 Boost a listing
42 Market estimate reports
43 Add a property abroad
44 Run an open house sign-in with a QR code
45 Print a listing flyer with a QR code
46 Virtually stage an empty room
47 Virtual staging allowance and credit packs
48 Import existing listings: file, feed or website
49 XML API sync: automatic daily feed import

33 CHAPTER 33

Manage your properties

All plans | For agents | Watch the video

OVERVIEW

You can keep a property in the CRM on any plan, and on Pro publish it to the portal for the country it is in. Once it is live, editing its main details in the CRM changes the portal listing too, and a property you put away is archived rather than deleted.

A property can live in the CRM alone — a vendor you have signed but not launched, or something you are not ready to advertise. It stays private until you say otherwise, deliberately: a default of published would put a seller's address on a public marketplace because a form was submitted.

On Pro you can publish it, and it goes to the portal for the country the property is in rather than the country you are in, so a Spanish house reaches the Spanish marketplace. It enters that portal's normal approval queue like any other listing.

Once a property you published from the CRM is live, editing it in the CRM changes the portal listing as well: the title, description, address, price, bedrooms, bathrooms, living area and listing type. A change to its location, property type, map pin or photographs is refused while it is live, rather than saved in the CRM only. Listings you created on the portal itself, or that come from a property feed, are shown in the CRM read-only — see "Can I see my portal listings in the CRM?".

Every listing link the CRM shows opens that listing on its own country's portal, whichever country you are in.

To add one, choose Add Property and fill in the form; you can save it as a draft and publish it later. See "How do I add a property in the CRM?".

Putting a property away

There is no delete. A property you have finished with is archived: it leaves My properties for the Archived view, and it keeps its address, its price, its photographs, its history and its links to the leads, deals and tasks that touched it. Restore puts it back. There is no time limit on that and nothing is waiting to erase it — an archive here is a place to put things, not a stage on the way to deletion.

While a property is archived you cannot edit it, publish it or take it live; restore it first. And archiving happens inside the CRM only. A property already published to a portal stays live on that portal exactly as it was, so if what you want is the advert taken down, take it down on the portal.

Bringing a portfolio across

Moving a whole portfolio across from a CSV file or an XML feed file is free on every plan, the free one included: choose Import from file in My properties, up to 5,000 rows per file. Every imported property arrives as a draft and nothing is published until you publish it. See "How do I import properties from a file?".

From the Help Center: **Can I manage my property listings?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

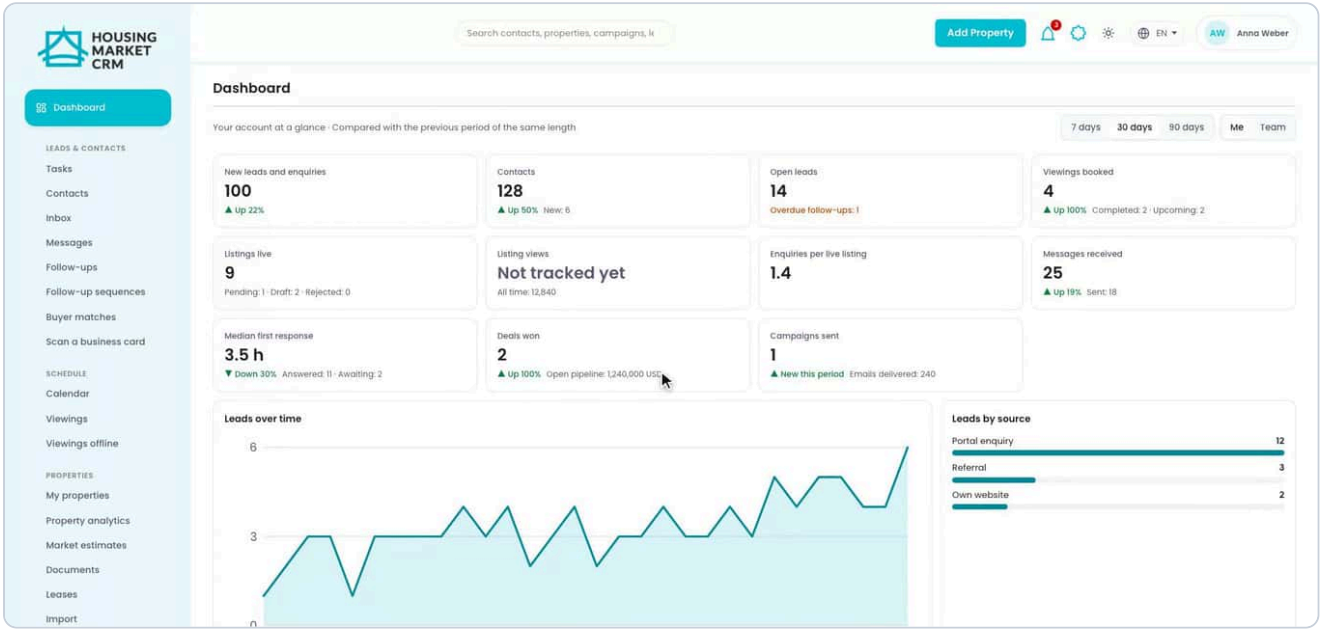


Figure 33.1 · Screen recorded 17 September 2026

2 Click **My properties** in the left menu.

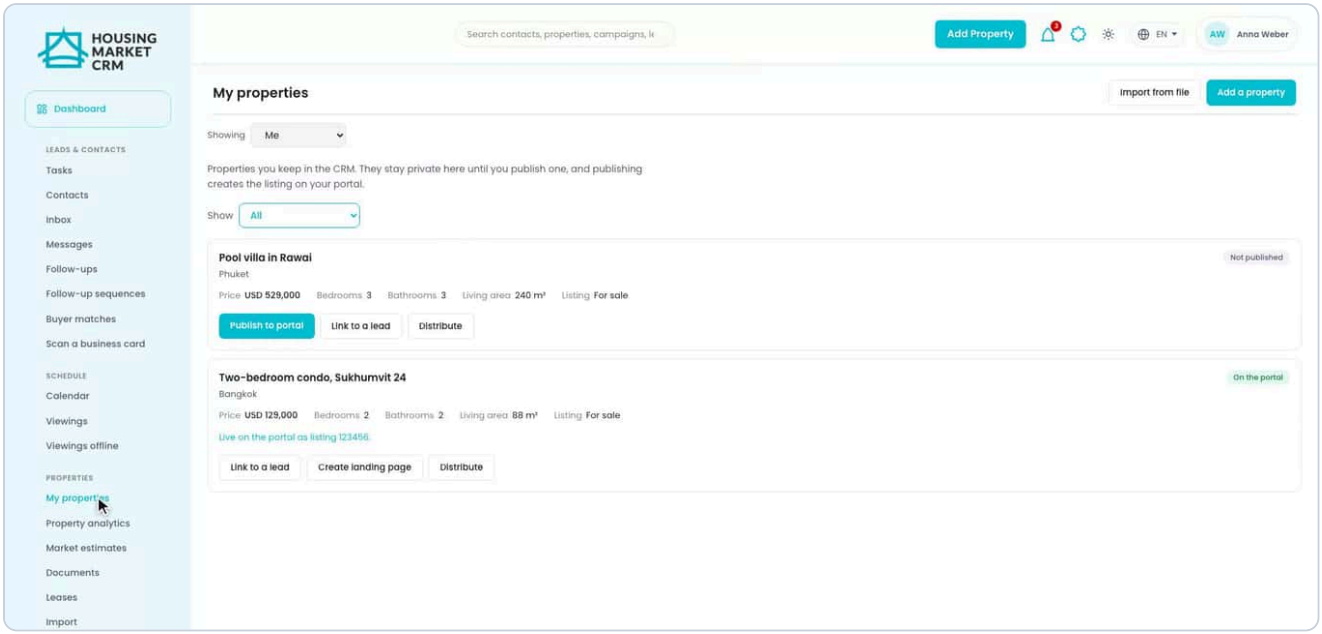


Figure 33.2 · Screen recorded 17 September 2026

3 Each card shows **price**, rooms, size and listing type.

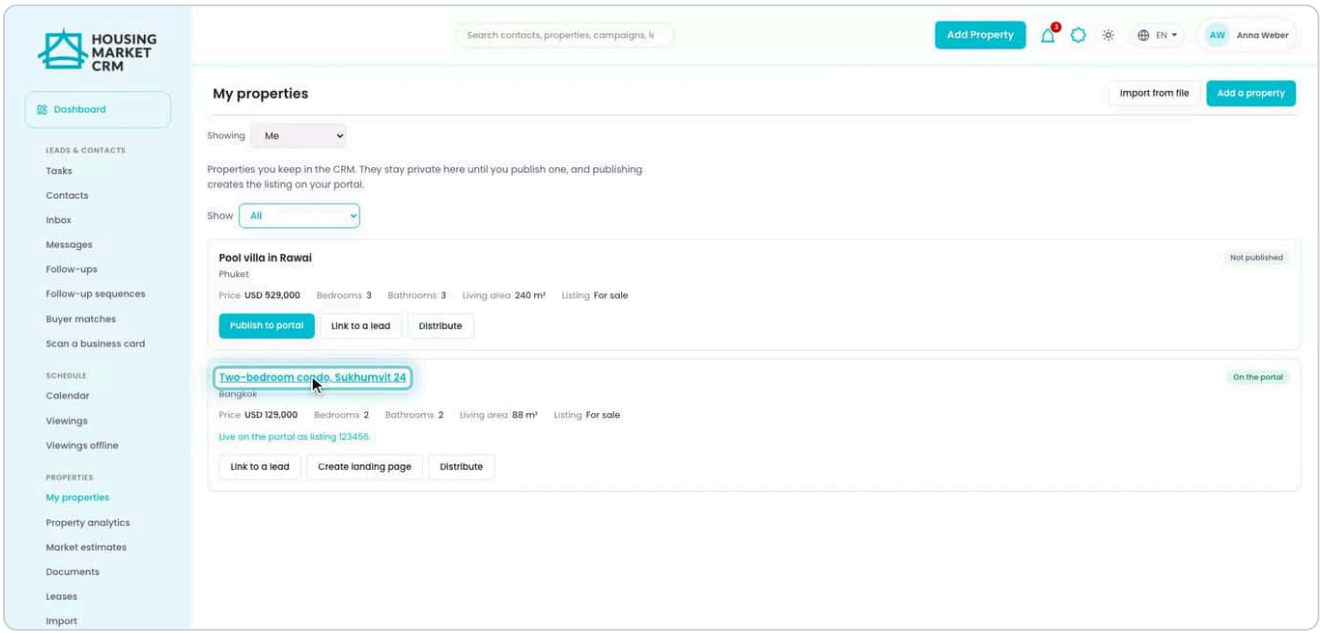


Figure 33.3 · Screen recorded 17 September 2026

4 **On the portal** means the listing is live.

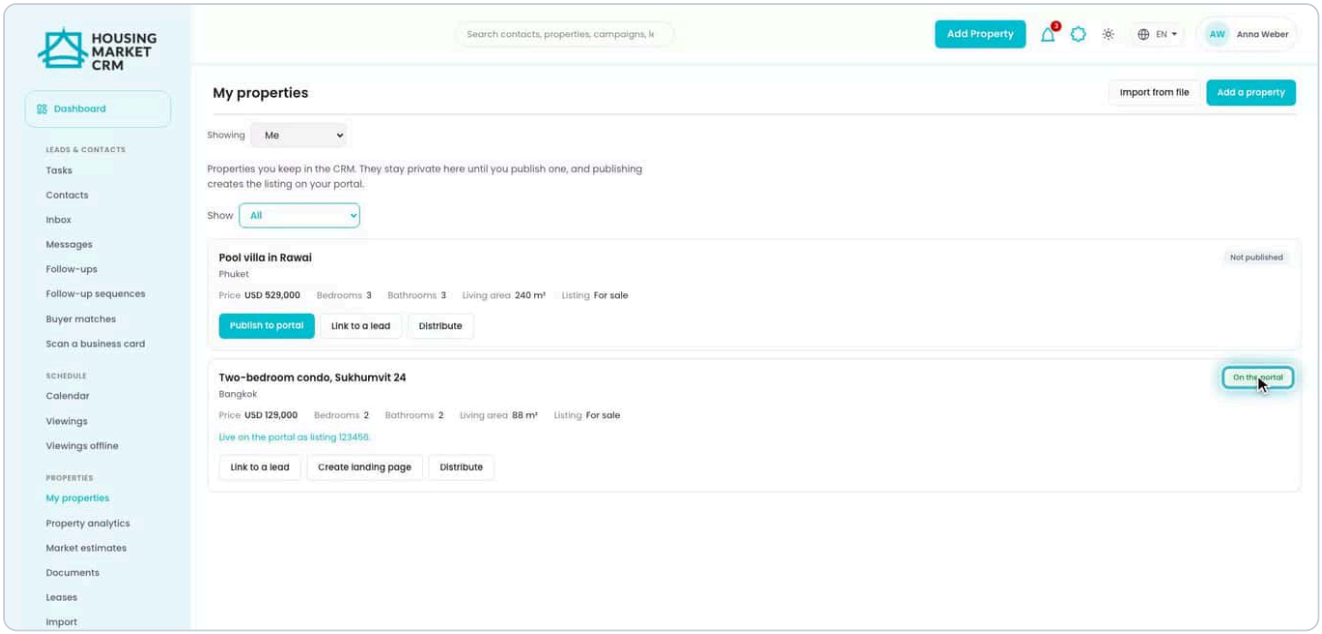


Figure 33.4 · Screen recorded 17 September 2026

5 **Not published** listings stay private in the CRM.

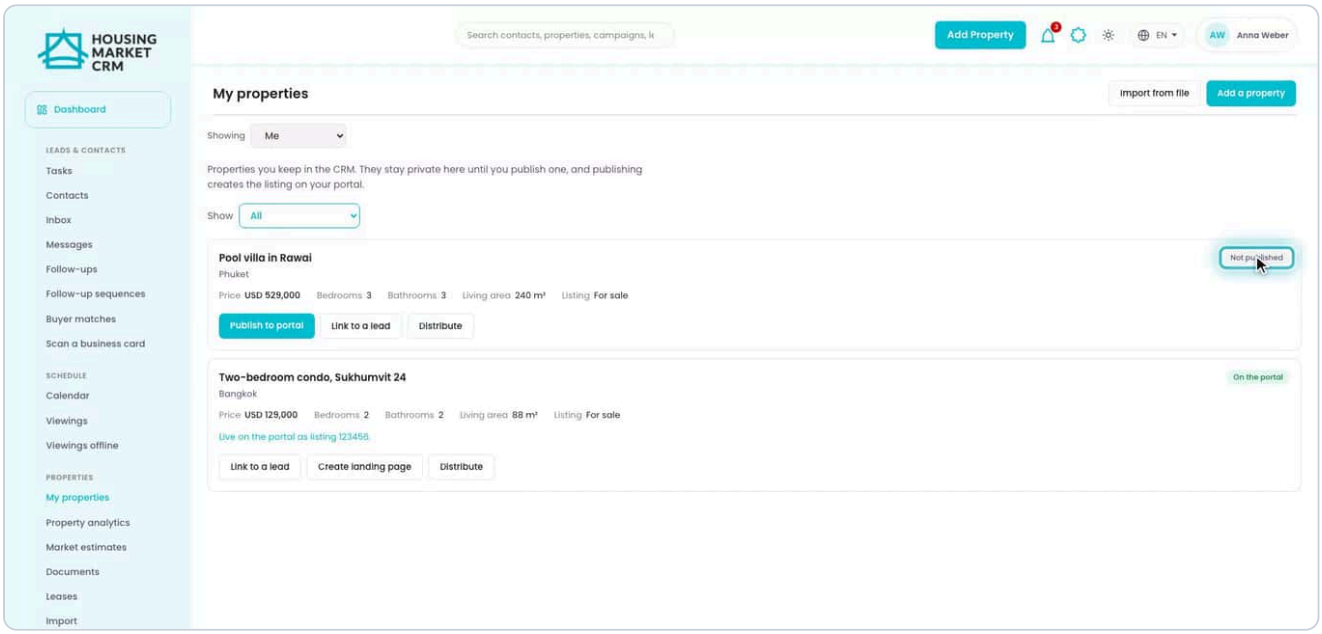


Figure 33.5 · Screen recorded 17 September 2026

6 Publish a draft with **Publish to portal** link it to a **lead**.

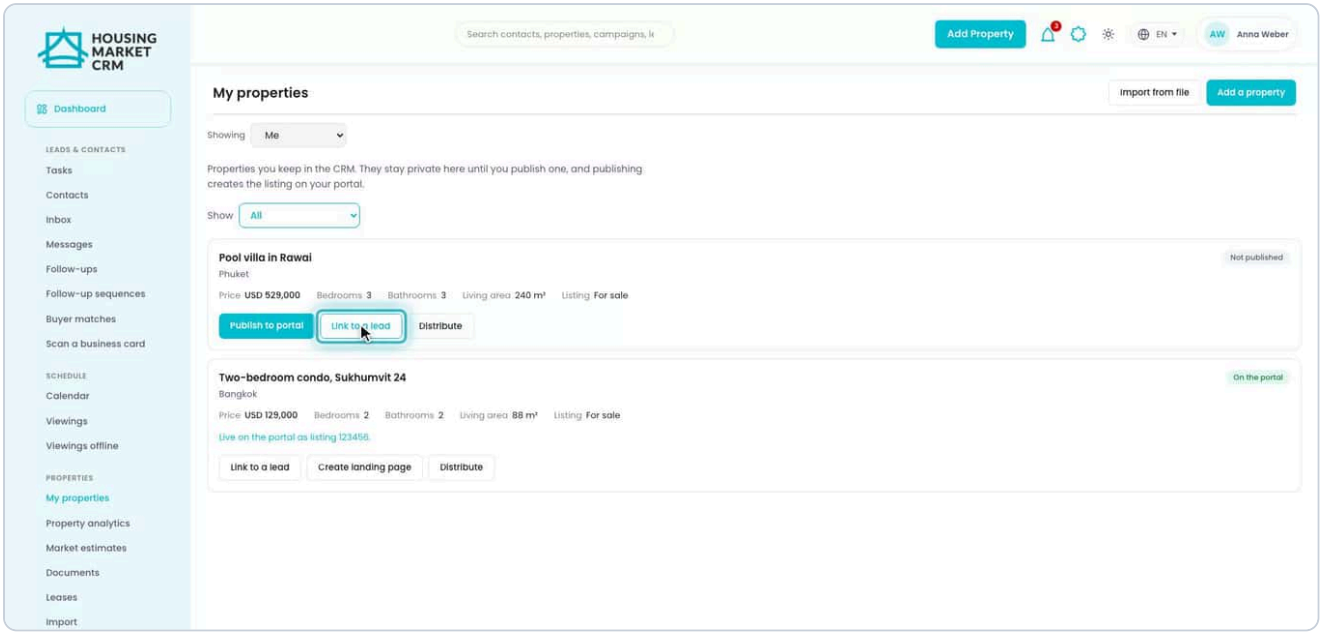


Figure 33.6 · Screen recorded 17 September 2026

7 create a **landing page**, or **distribute** it.

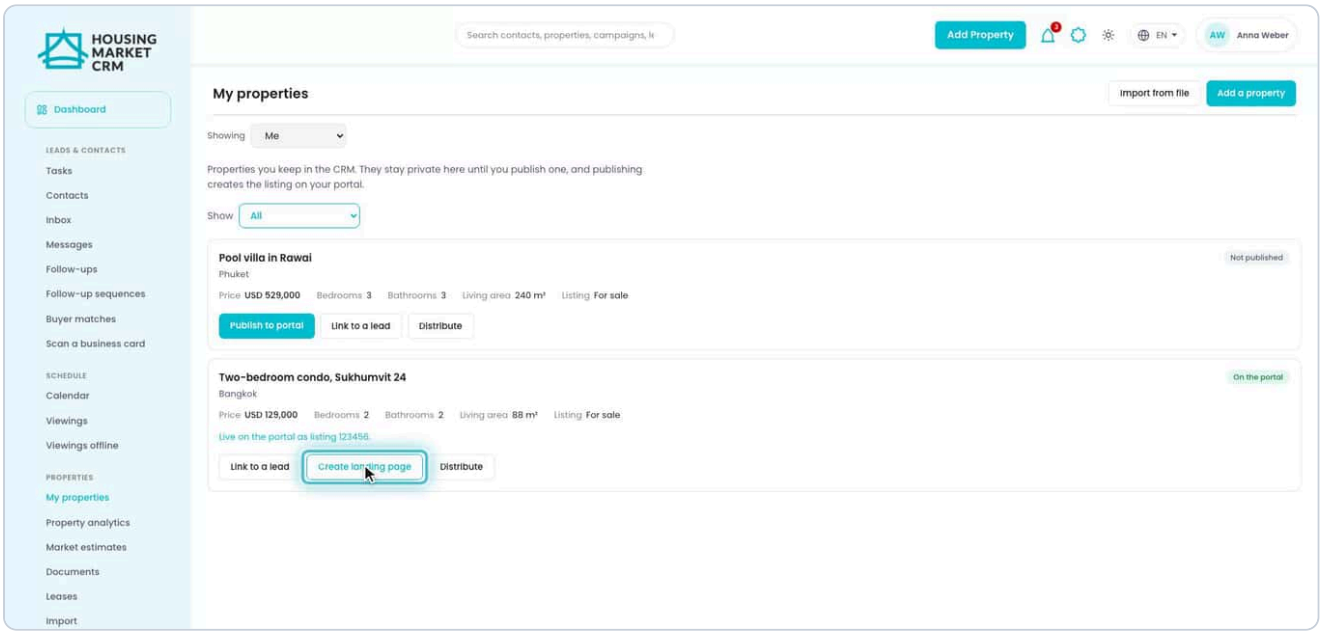


Figure 33.7 · Screen recorded 17 September 2026

8 Filter by **status**.

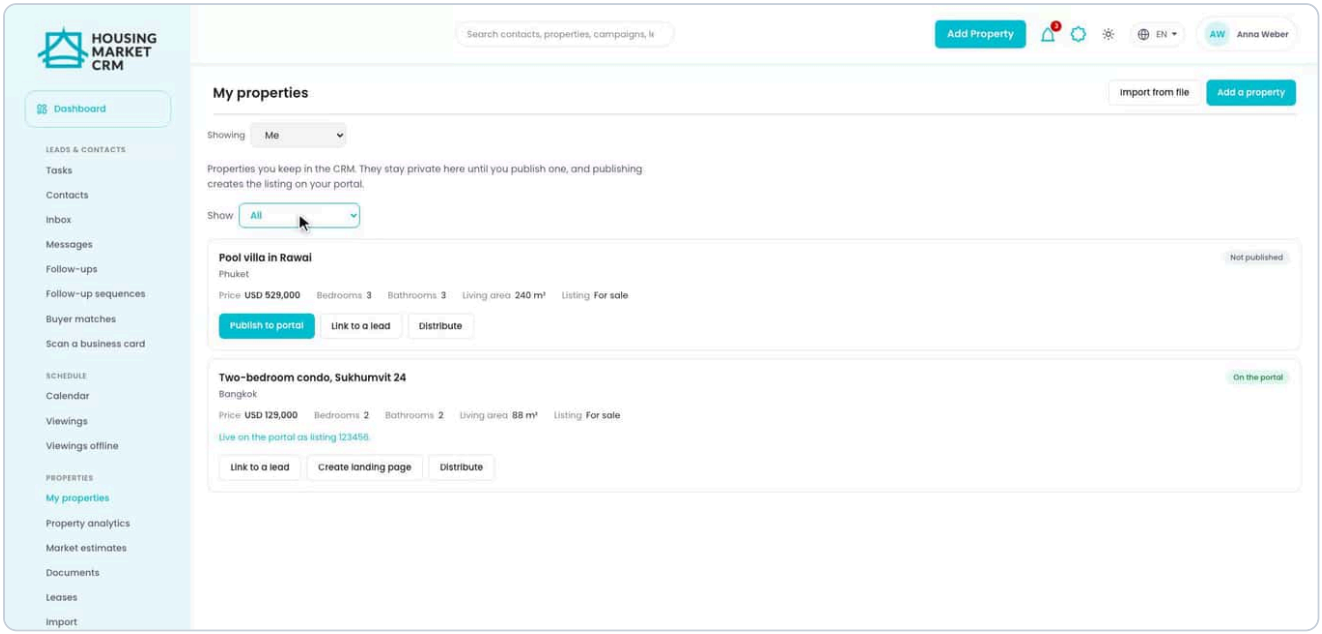


Figure 33.8 · Screen recorded 17 September 2026

9 Add new listings with **Add a property**.

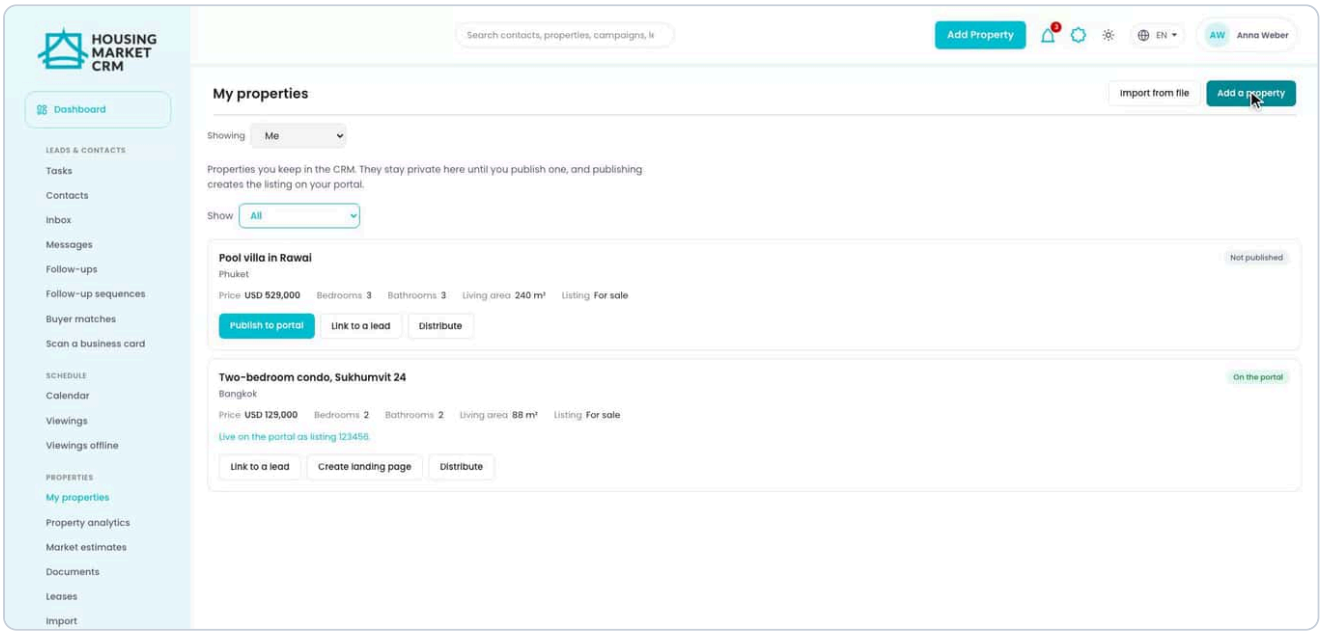


Figure 33.9 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

How do I add a property in the CRM?	faq.housingmarketgroup.com/faq/how-do-i-add-a-property
What happens when I delete a contact, a lead or a colleague?	faq.housingmarketgroup.com/faq/what-happens-when-i-delete-a-contact-a-lead-or-a-colleague

34 CHAPTER 34

Add a property

All plans | For agents | Watch the video

OVERVIEW

Choose Add Property, fill in the form — the portal's property types, the map pin and the price are on it — then choose Save as draft or Publish.

- Choose Add Property at the top of the screen, or the + button on a phone.
- Enter a Title and the Address. Picking a suggested address fills in the Province and City and places the pin; check that they are right.
- Choose the Type. The list is your portal's own property types, such as Condo, House, Villa or Land.
- Under Location on the map, choose Place on map if there is no pin yet, then drag the pin or tap the map to mark the exact spot.
- Enter the Price. It is in your portal's currency unless you choose another, and it is never converted.
- Add Bedrooms, Bathrooms, Living area and whether it is For sale or To rent, and a Description — or choose Write with AI on Pro.
- Choose Save as draft to keep it in the CRM, or Publish to put it live on your portal.

Draft or publish

A draft needs only a title and stays in the CRM; it is not shown on the portal. Publishing needs a price, a province, a city where the province has cities, and at least three photos, added with Add photos — the first photo is the cover. Anything missing is marked on the form. Publishing is part of Pro; on the free plan you can still save the property in the CRM.

The form names the portal the property will be published on. You can publish a draft later from its page in My properties. A property that is already live on the portal cannot be edited in the CRM.

From the Help Center: **How do I add a property in the CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

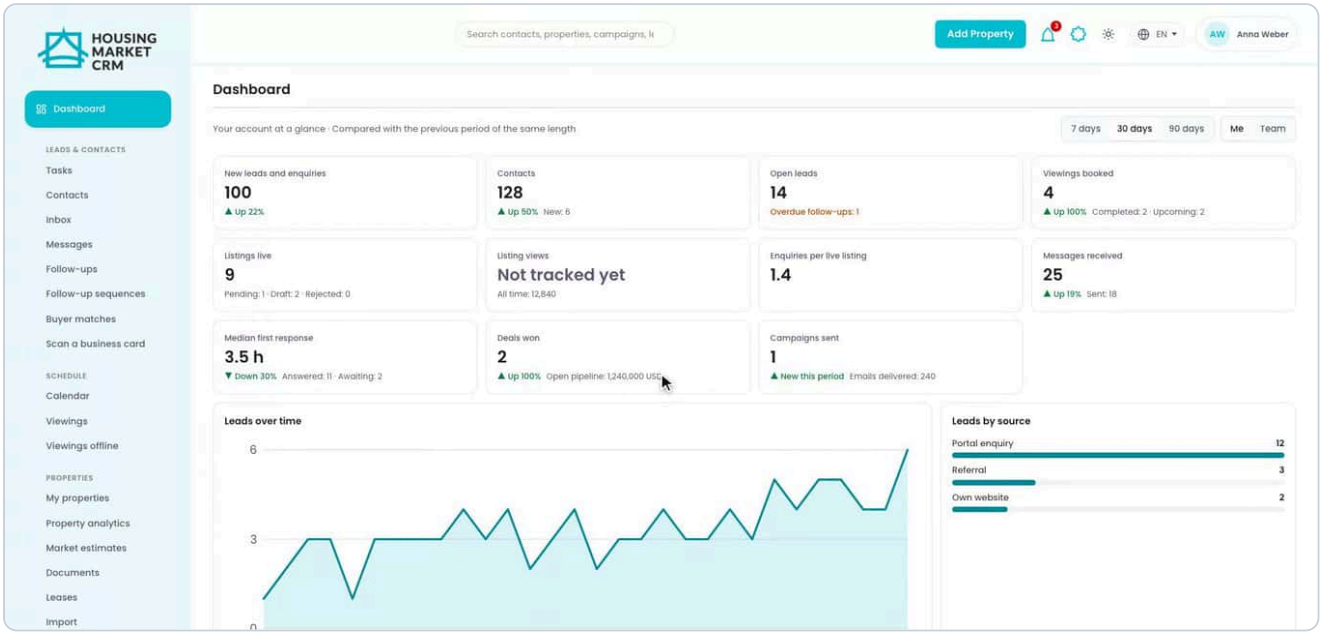


Figure 34.1 · Screen recorded 17 September 2026

2 Click **Add Property** at the top.

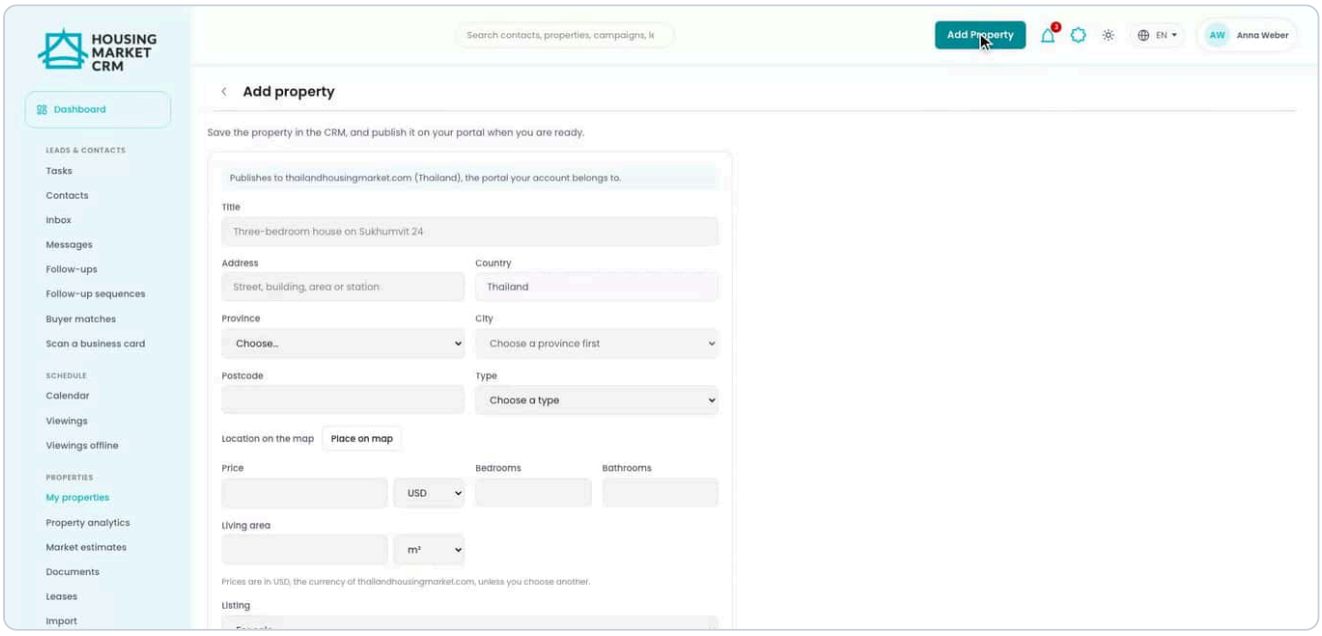


Figure 34.2 · Screen recorded 17 September 2026

3 Enter a clear **title**.

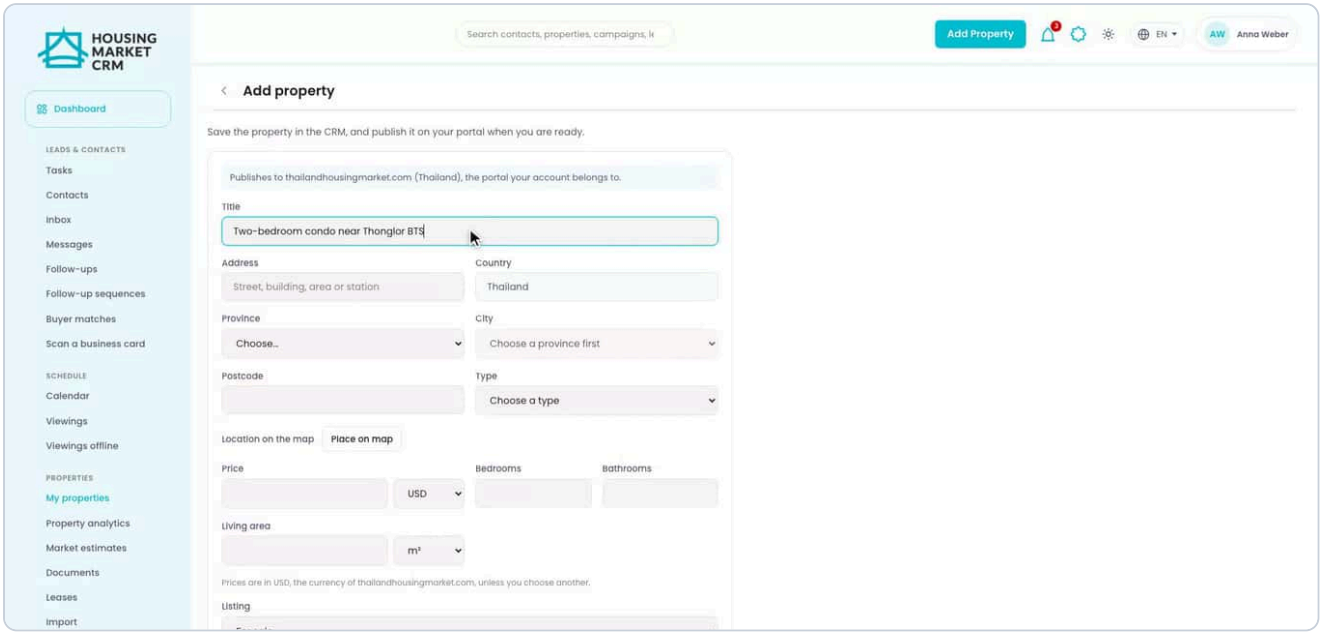


Figure 34.3 · Screen recorded 17 September 2026

4 Add the **address**.

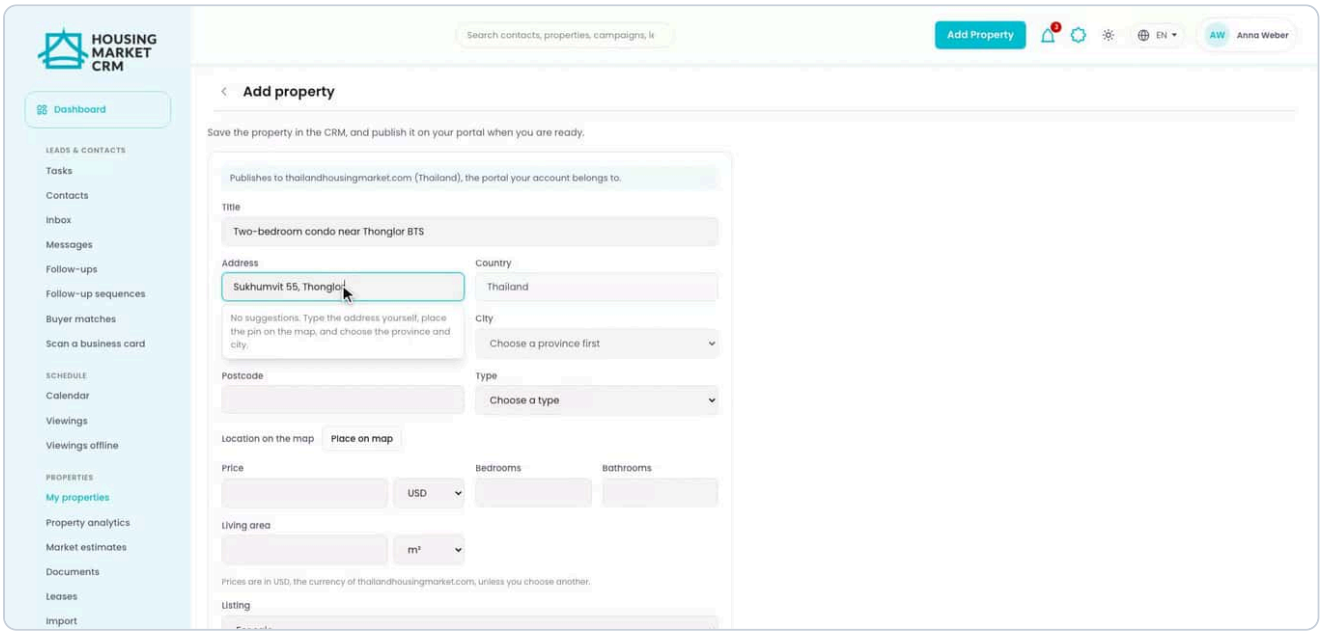


Figure 34.4 · Screen recorded 17 September 2026

5 Choose the **province** and the **city** or district.

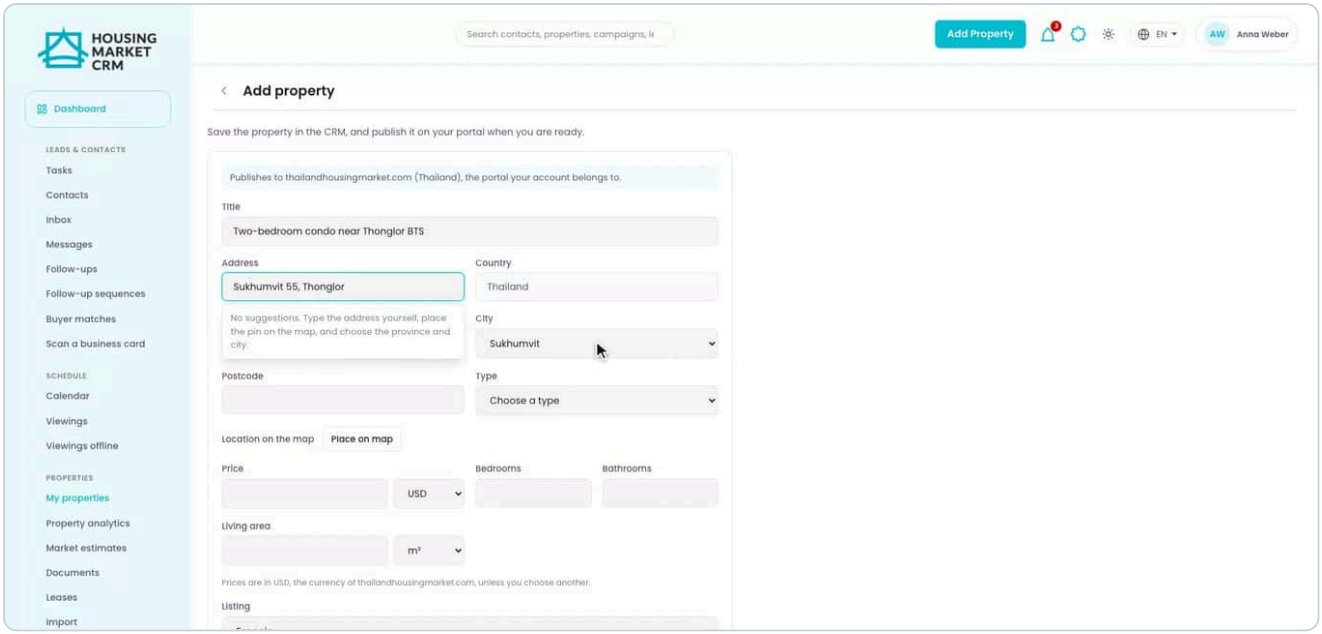


Figure 34.5 · Screen recorded 17 September 2026

6 Pick the **property type**.

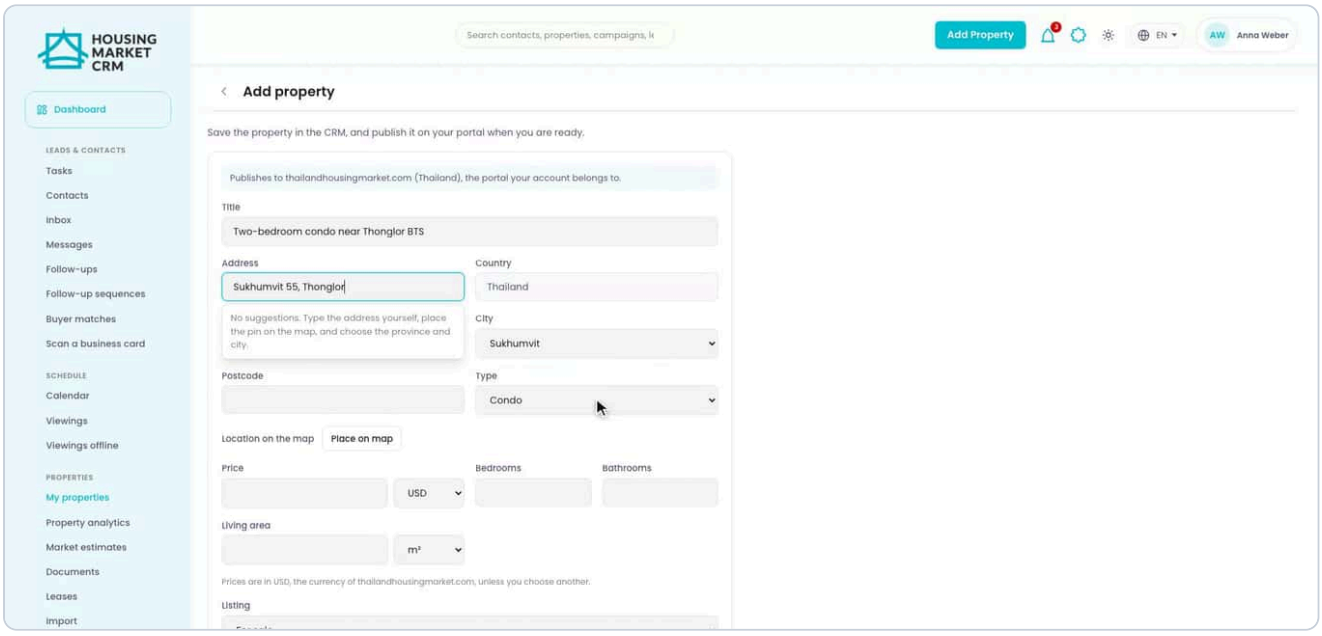


Figure 34.6 · Screen recorded 17 September 2026

7 Enter the **price** in US dollars.

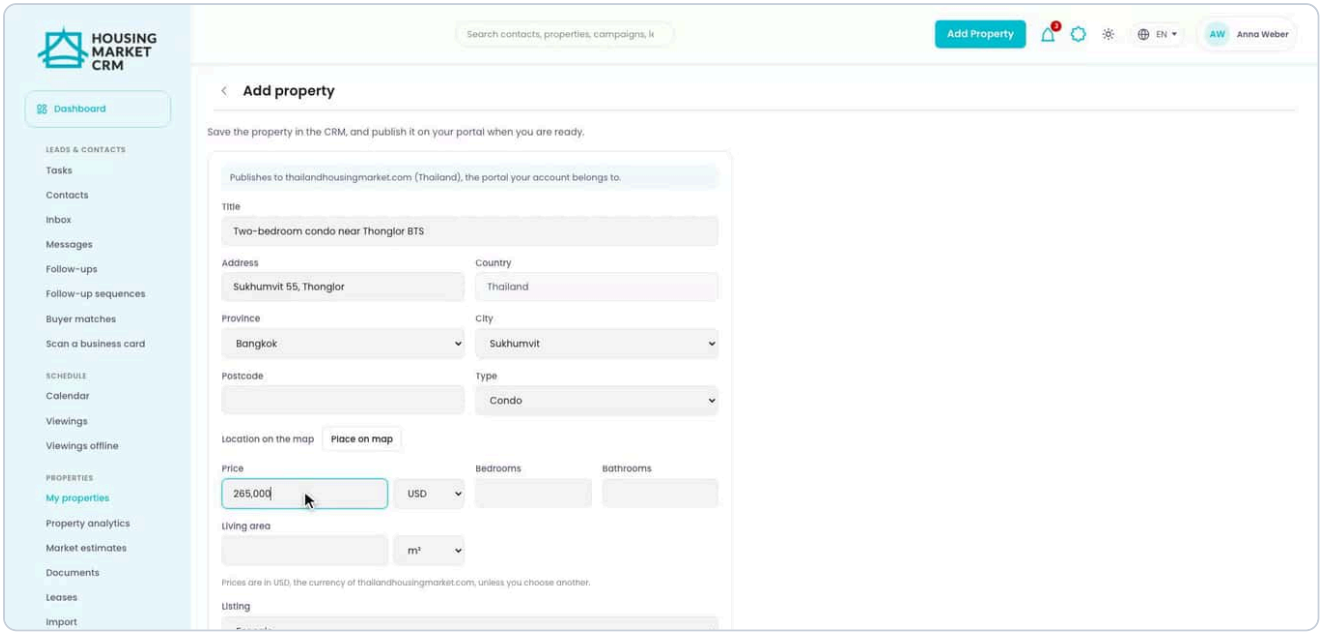


Figure 34.7 · Screen recorded 17 September 2026

8 Add **bedrooms**, **bathrooms** and the **living area**.

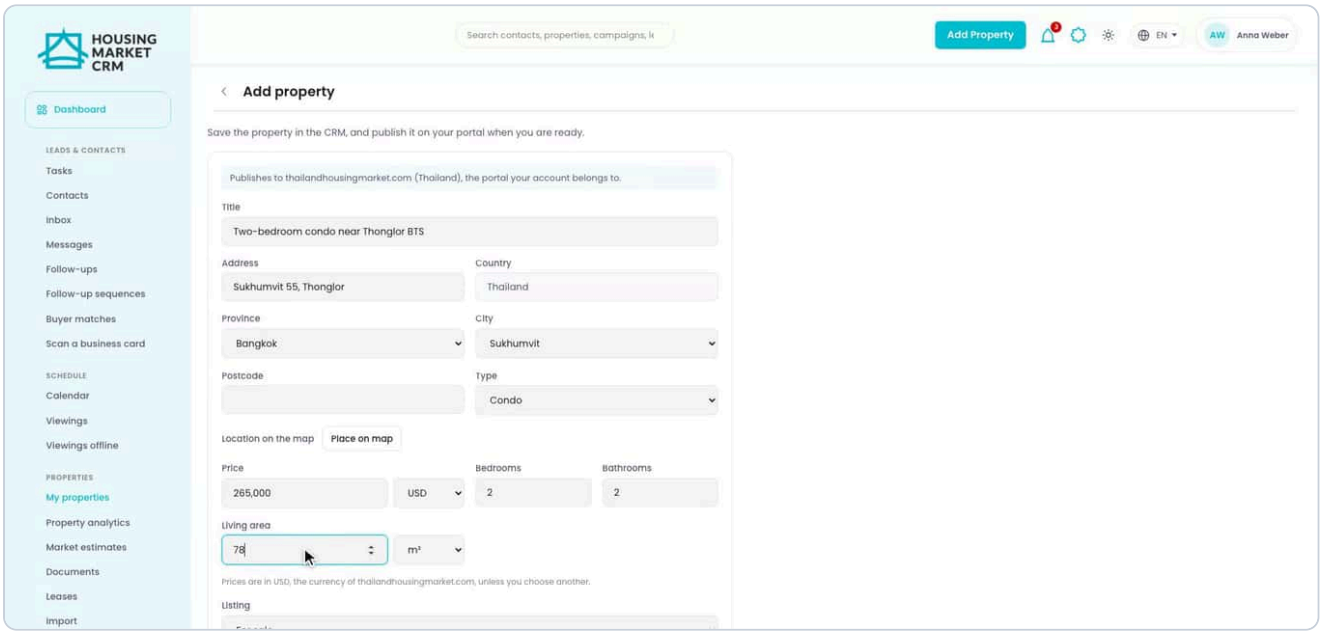


Figure 34.8 · Screen recorded 17 September 2026

9 Choose **For sale** or **To rent**.

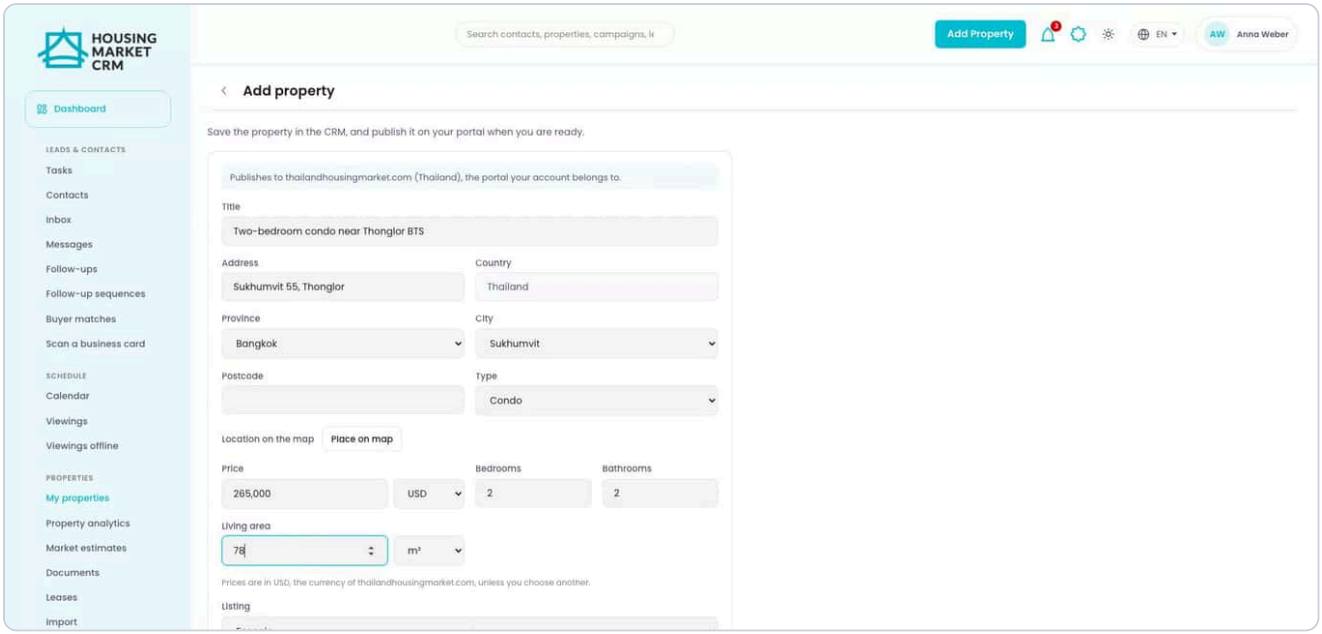


Figure 34.9 · Screen recorded 17 September 2026

10 Write a **description**.

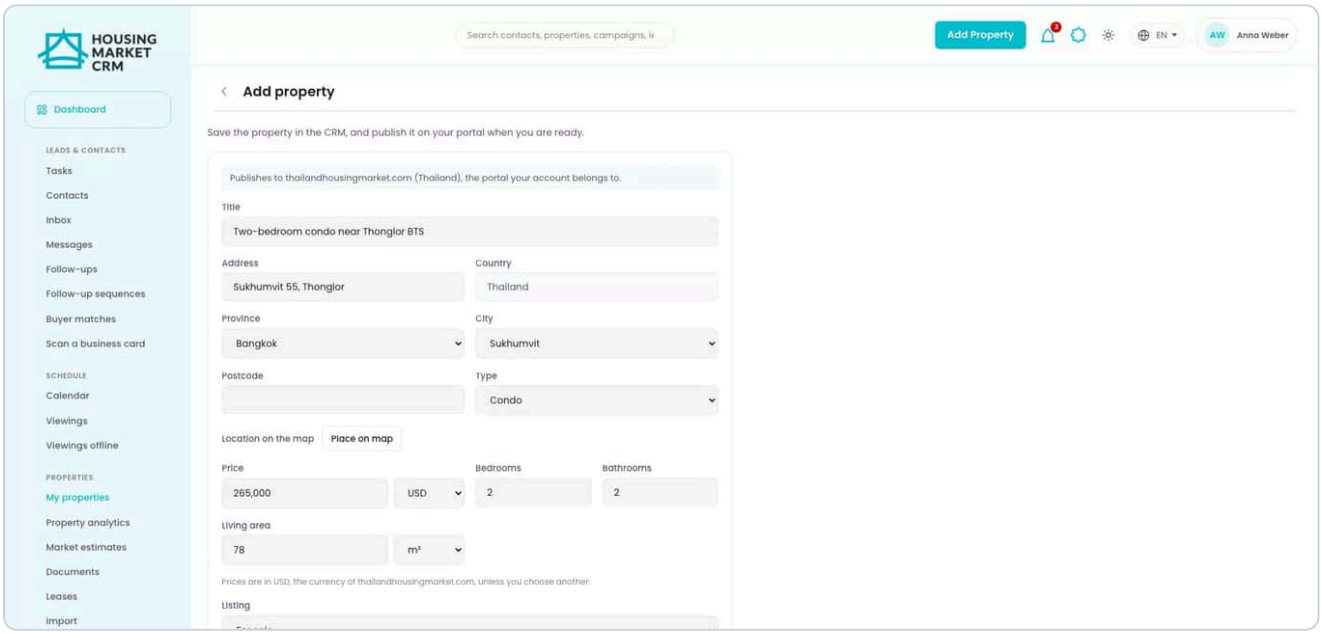


Figure 34.10 · Screen recorded 17 September 2026

11 Add **photos** of the home.

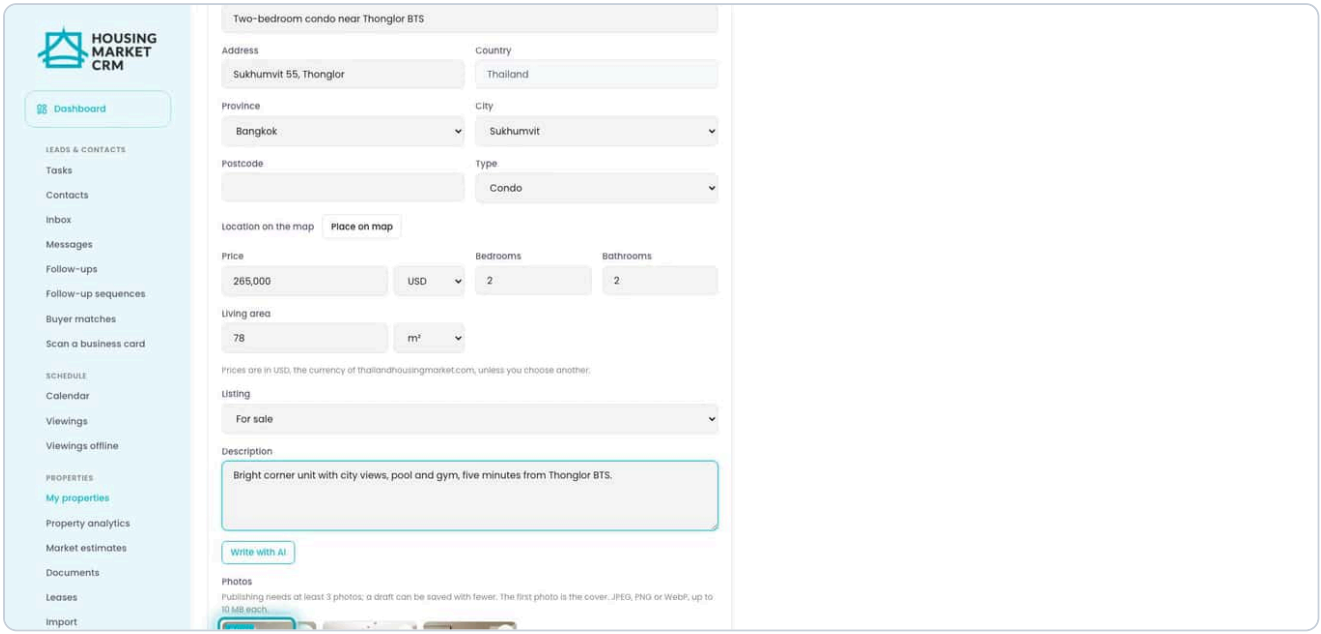


Figure 34.11 · Screen recorded 17 September 2026

12 Click **Save as draft** — or **Publish** when ready.

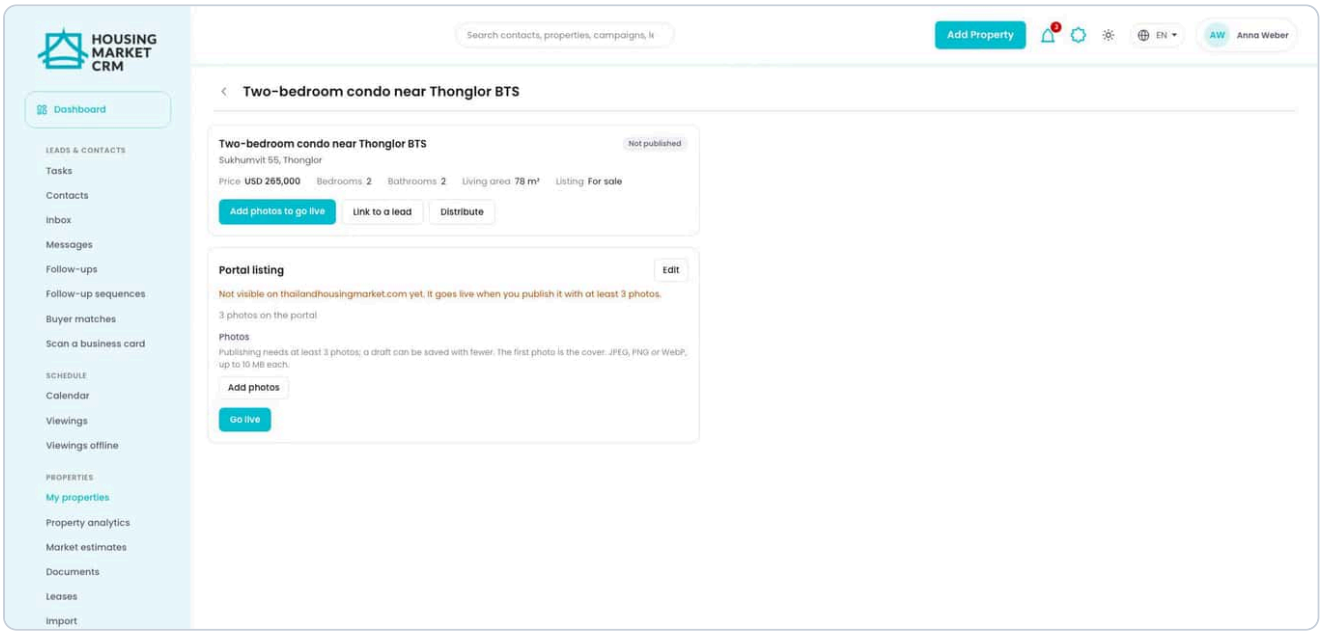


Figure 34.12 · Screen recorded 17 September 2026

13 Your property is saved in **My properties**.

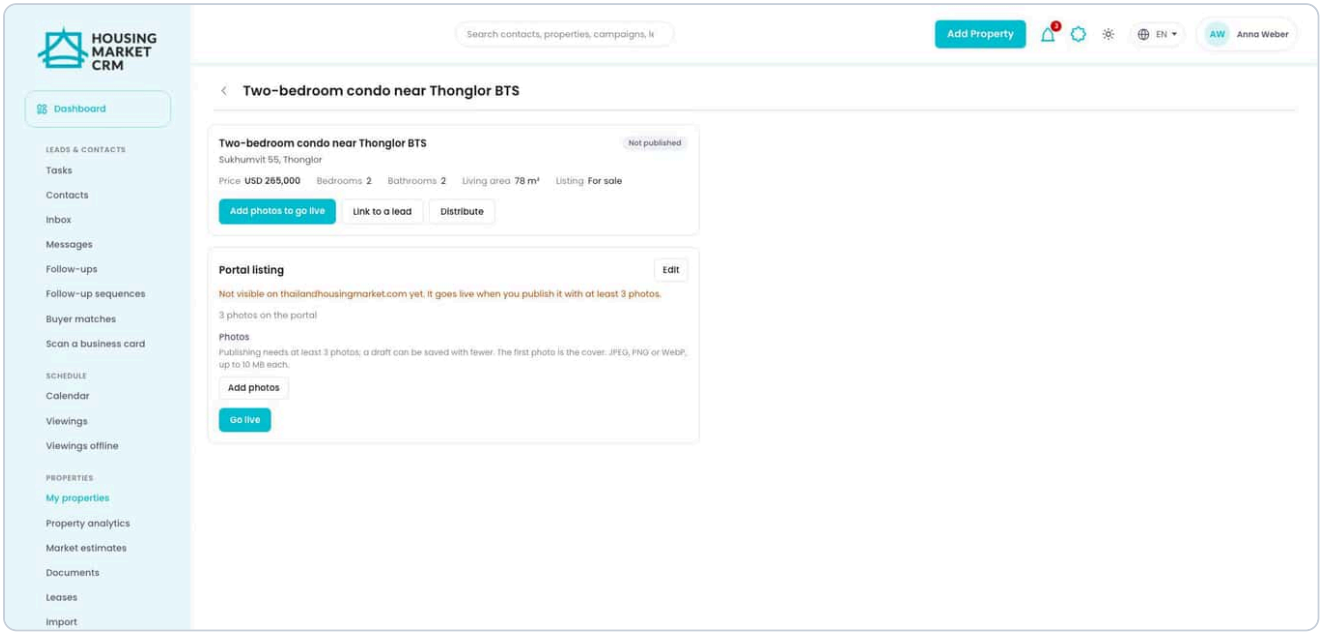


Figure 34.13 · Screen recorded 17 September 2026

GOOD TO KNOW

TIP

On Pro, Write with AI on the property form drafts a description from the details you have entered, in your portal's language. You read it, edit it and save it yourself.

Help Center: How does the AI listing writer work?

RELATED HELP CENTER ARTICLES

Can I manage my property listings?	faq.housingmarketgroup.com/faq/can-i-manage-my-property-listings

35 CHAPTER 35

Publish a property to the portal

All plans | For agents | Watch the video

TODO Plan: the Help Center says publishing to the portal is on Pro; the video catalogue lists this task for all plans, so the chapter prints "All plans". Confirm the plan.

TODO The Help Center says a published property "enters that portal's normal approval queue"; the video (2026-09-17) says "The listing is now on your Housing Market portal". Reword the caption, or confirm there is no approval step.

OVERVIEW

You can keep a property in the CRM on any plan, and on Pro publish it to the portal for the country it is in. Once it is live, editing its main details in the CRM changes the portal listing too, and a property you put away is archived rather than deleted.

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Moving a whole portfolio across from a CSV file or an XML feed file is free on every plan, the free one included: choose Import from file in My properties, up to 5,000 rows per file. Every imported property arrives as a draft and nothing is published until you publish it. See "How do I import properties from a file?".

From the Help Center: **Can I manage my property listings?**

STEP BY STEP

1 Open **Add property** — or a draft from My properties.

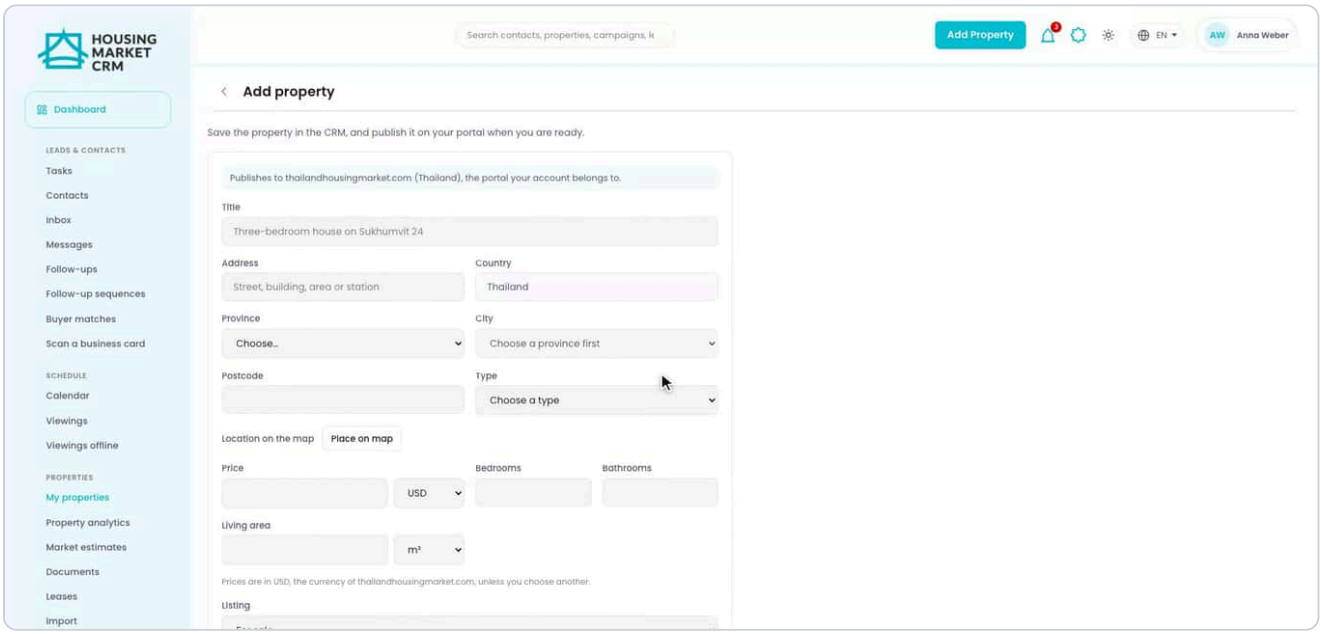


Figure 35.1 · Screen recorded 17 September 2026

2 Check the **title** and details.

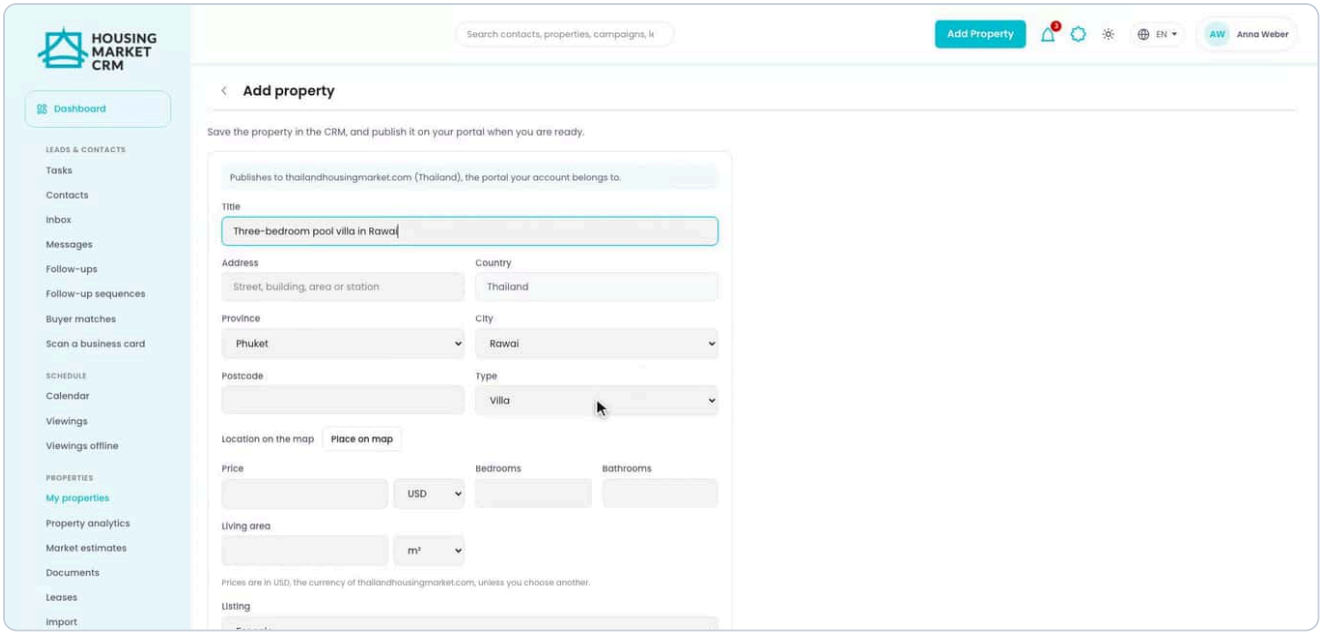


Figure 35.2 · Screen recorded 17 September 2026

3 Confirm the **price** in US dollars.

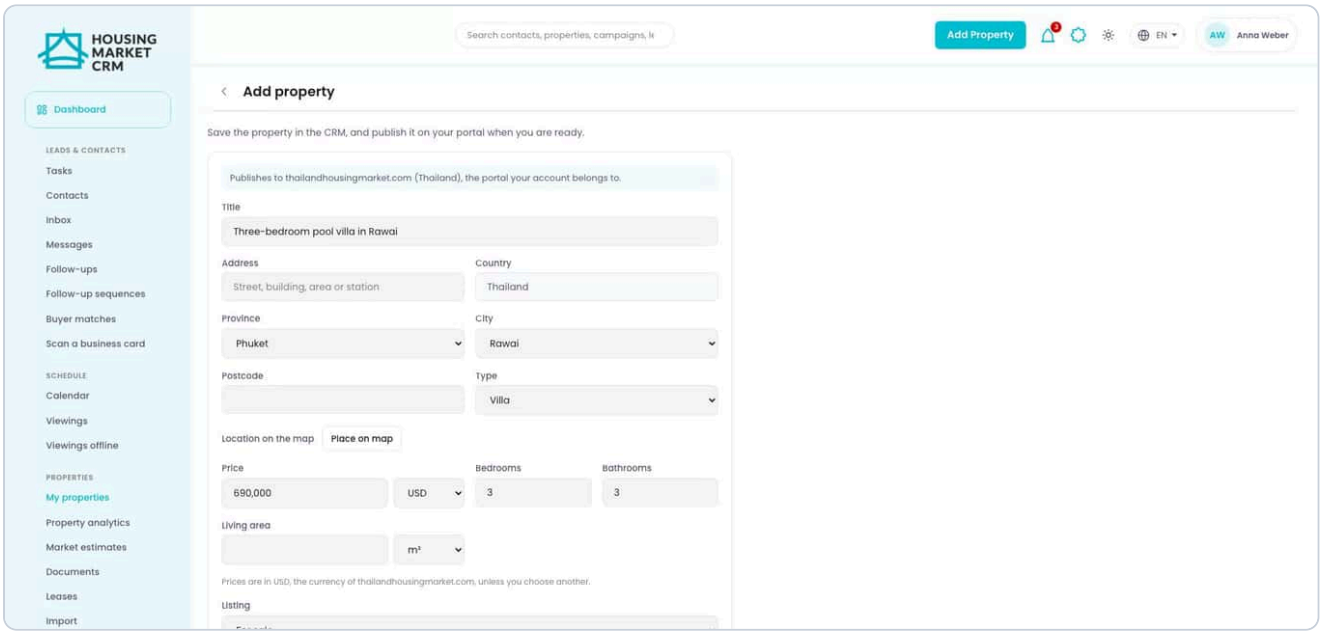


Figure 35.3 · Screen recorded 17 September 2026

4 Publishing needs **at least three photos**.

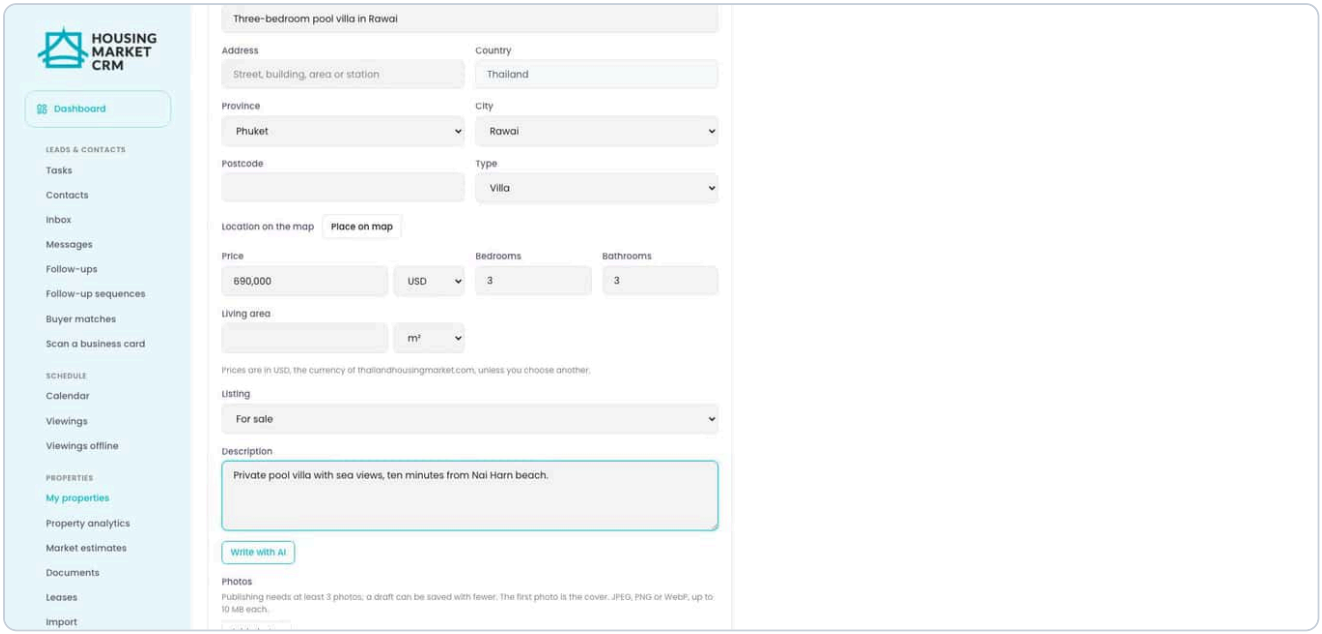


Figure 35.4 · Screen recorded 17 September 2026

5 Click **Add photos** and choose them.

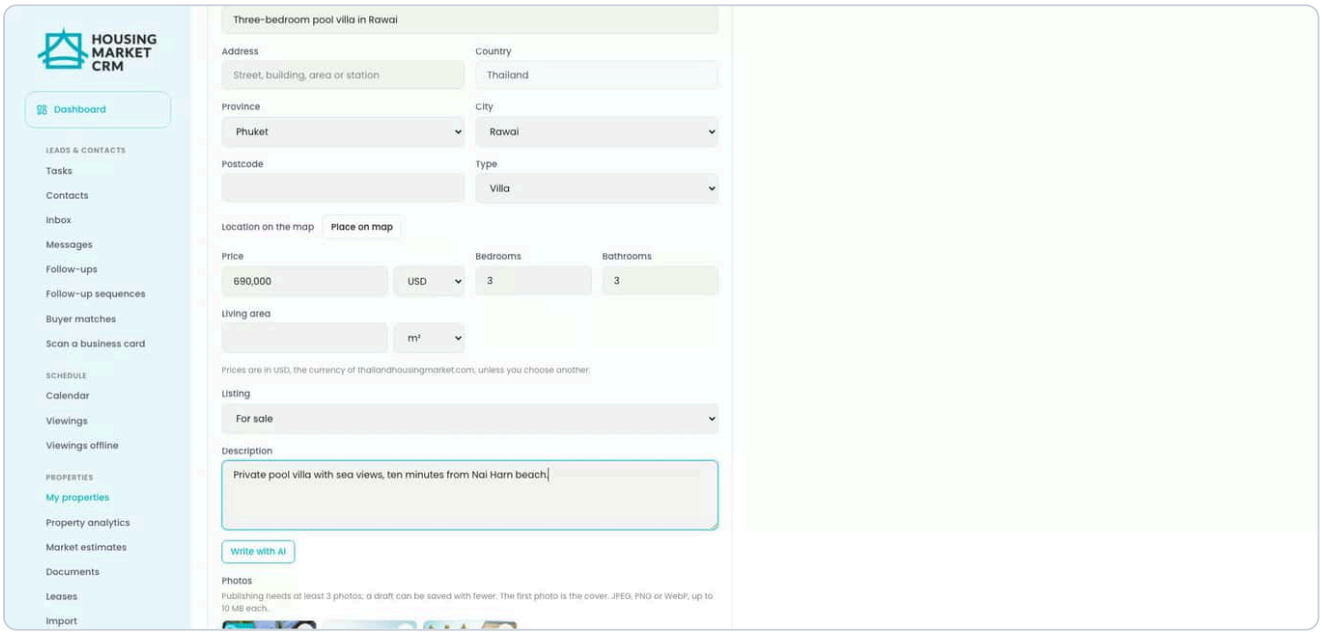


Figure 35.5 · Screen recorded 17 September 2026

6 The first photo becomes the **cover**.

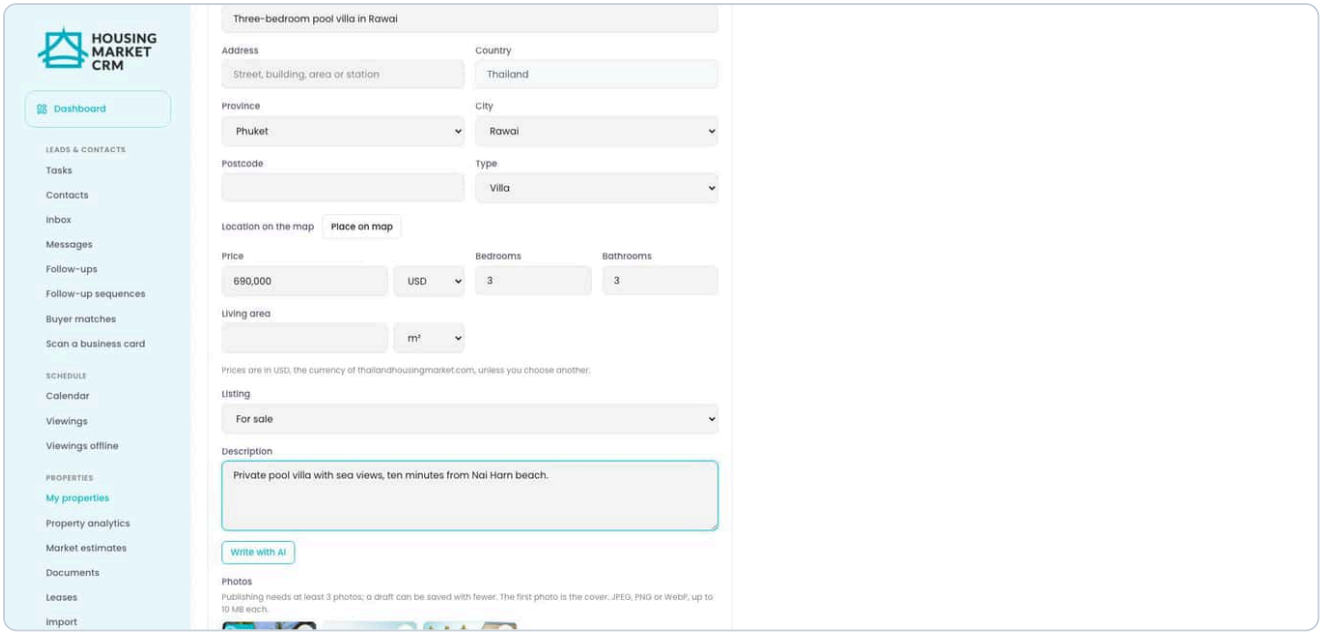


Figure 35.6 · Screen recorded 17 September 2026

7 Click **Publish**.

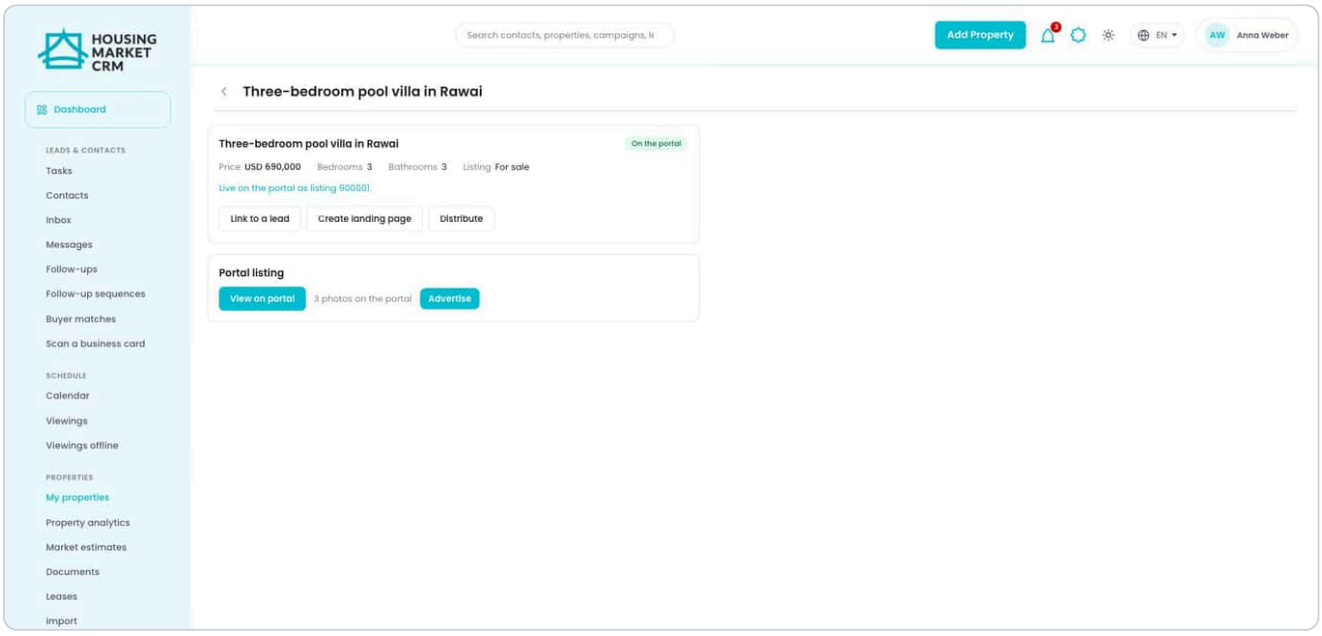


Figure 35.7 · Screen recorded 17 September 2026

8 The listing is now **on your Housing Market portal**.

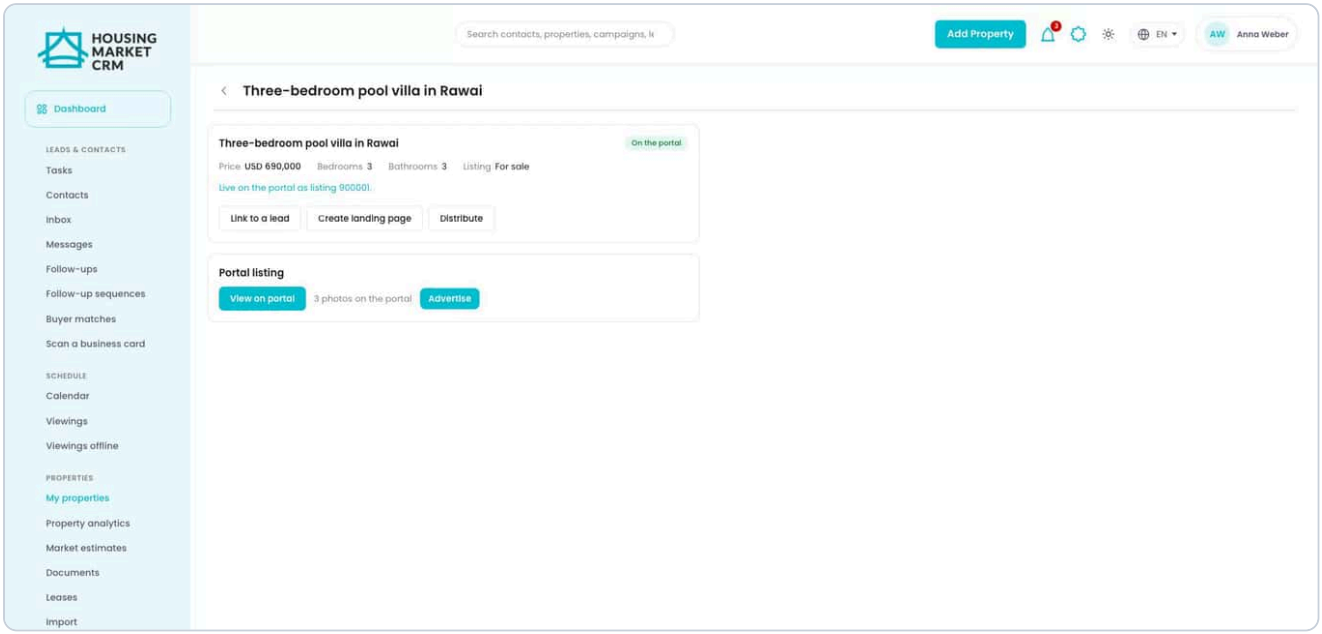


Figure 35.8 · Screen recorded 17 September 2026

9 Enquiries from it arrive here as **leads**.

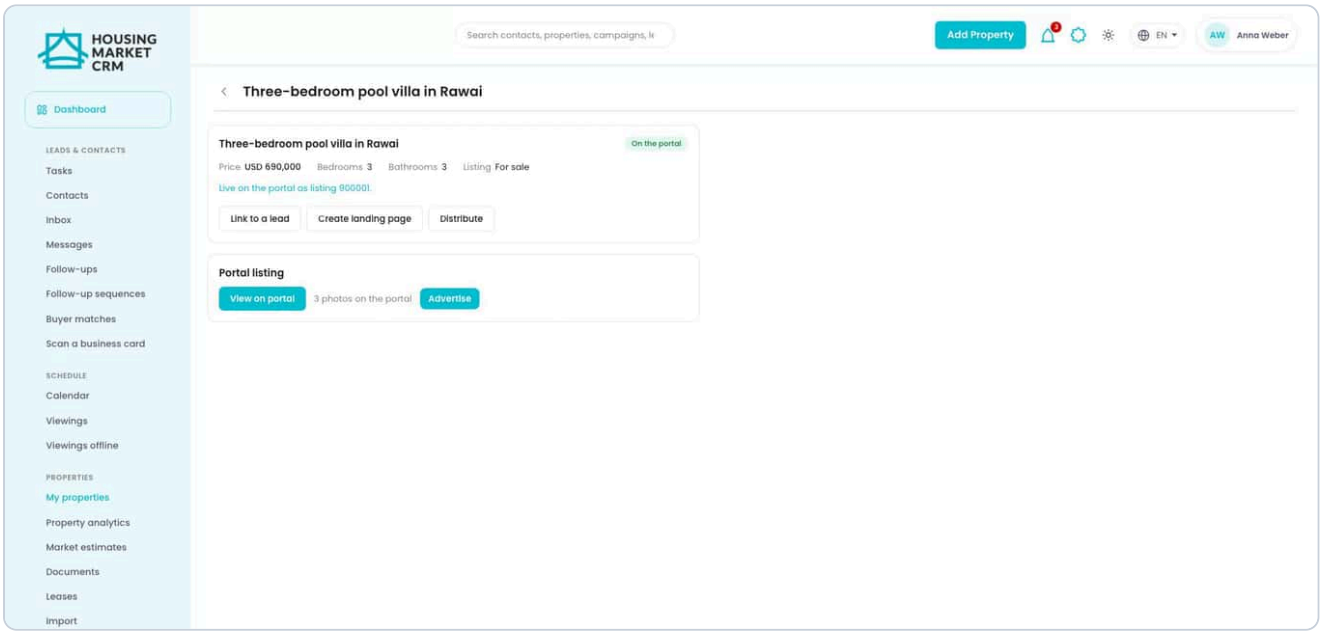


Figure 35.9 · Screen recorded 17 September 2026

GOOD TO KNOW

NOTE

It is not integrated with the portals — it is part of them. One account, one database, and enquiries that never have to cross a boundary.

Help Center: Is the CRM integrated with Housing Market Group?

RELATED HELP CENTER ARTICLES

How do I add a property in the CRM?	faq.housingmarketgroup.com/faq/how-do-i-add-a-property

36 CHAPTER 36

Your portal listings

All plans | For agents | Watch the video

OVERVIEW

Yes. My properties shows your listings that are already on the portal, under On the portals, with their views, enquiries and saves. They are read-only in the CRM: change them on the portal.

Open My properties in the left menu. The properties you keep in the CRM come first. Below them, under On the portals, are your listings that are already on a portal, each marked Portal listing with its status there: Draft, Waiting for review, Live or Rejected.

The figures

- Views — all the views the listing has had on the portal.
- Enquiries — all the enquiries about it.
- Saved now — how many shortlists it is on at the moment, so this figure can go down.

Each card also compares the listing's views with the average of the listings on the screen.

Changing a listing

The portal is the source of truth for these listings, so the CRM shows them without changing them. Choose Edit on the portal to change one, or View on the portal to see it as buyers do. A listing that comes from a partner property feed can never be edited in the CRM, because the feed rewrites it on every import; change it at the source.

Your agency's listings

Choose My agency to see every portal listing your agency owns, yours and your colleagues', with the same figures; Mine takes you back to your own. Your agency is your office in the CRM: the colleagues who have a seat on your account.

From the Help Center: **Can I see my portal listings in the CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

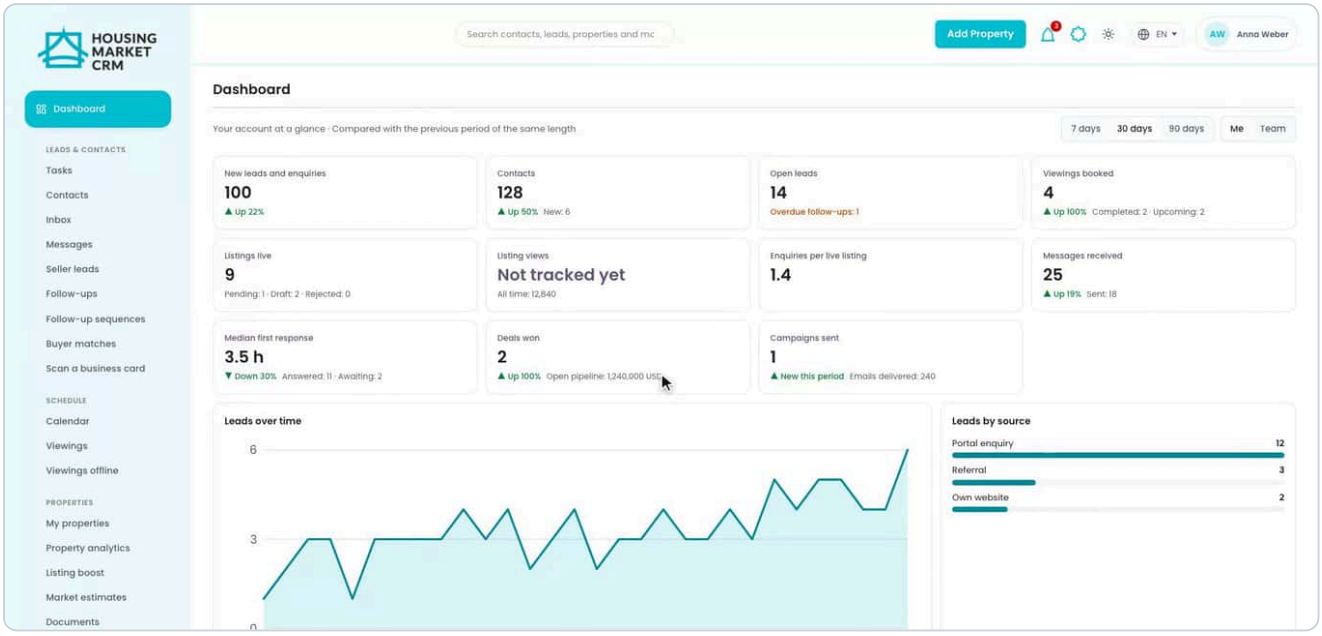


Figure 36.1 · Screen recorded 16 October 2026

2 Click **My properties** in the left menu.

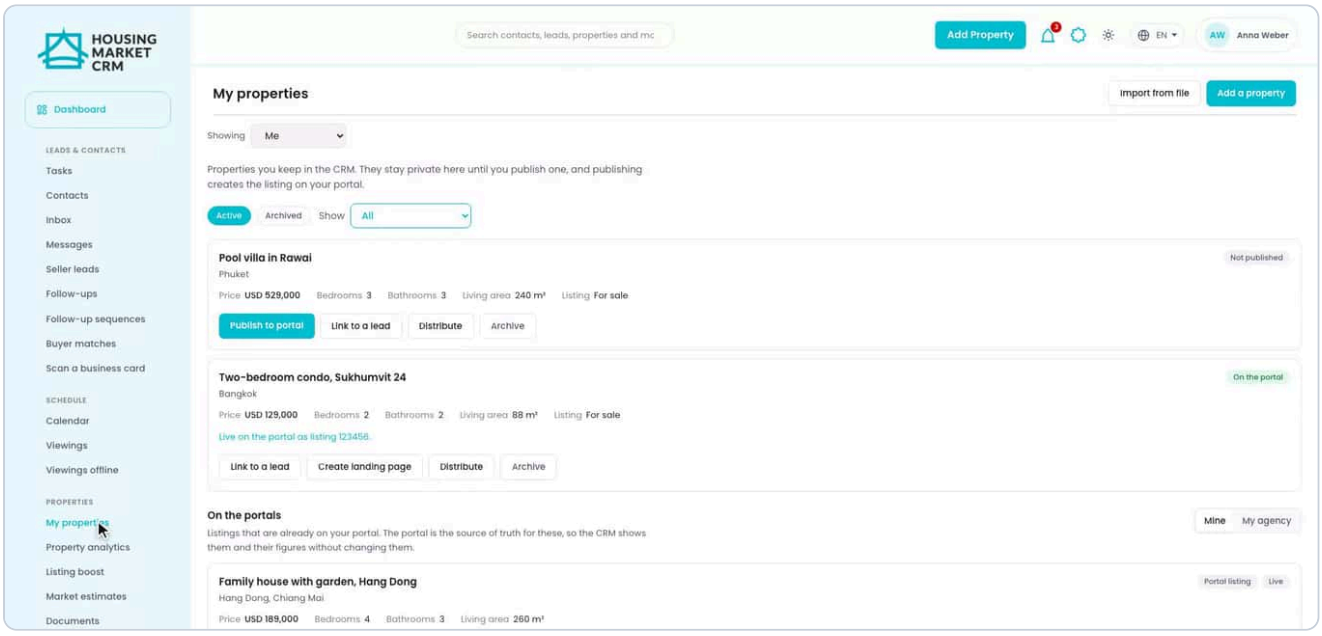


Figure 36.2 · Screen recorded 16 October 2026

3 At the top: the properties you manage **in the CRM**.

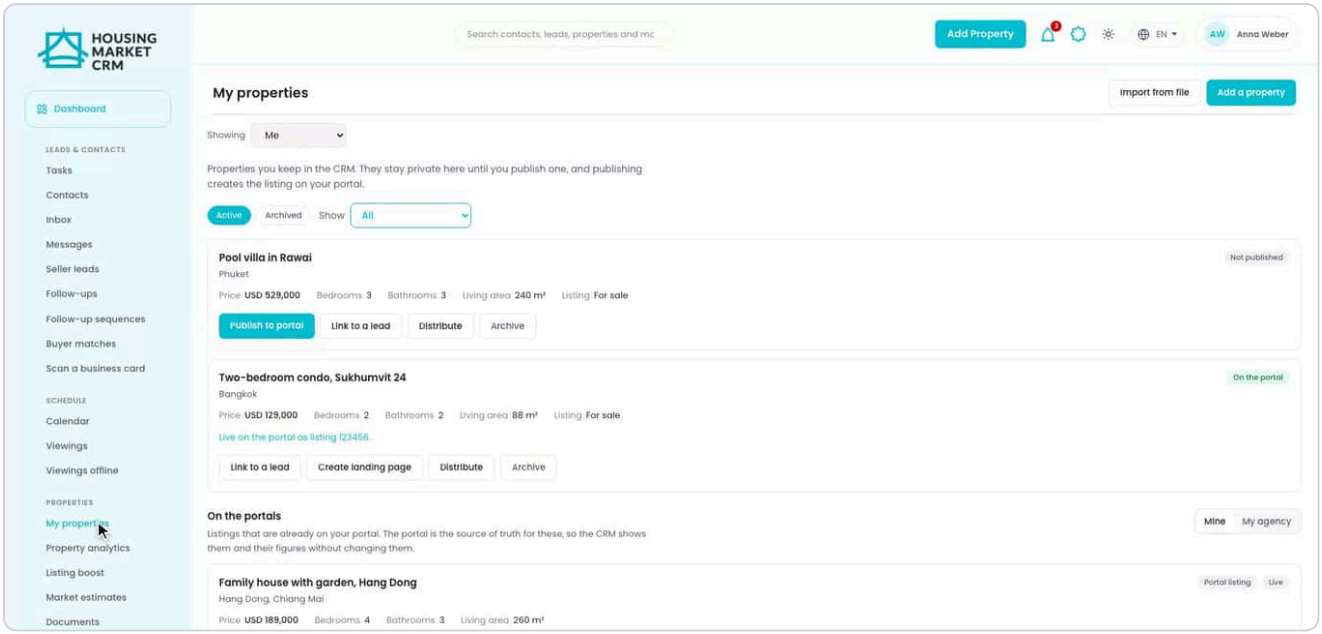


Figure 36.3 · Screen recorded 16 October 2026

4 Below them: your listings that are **already on the portal**.

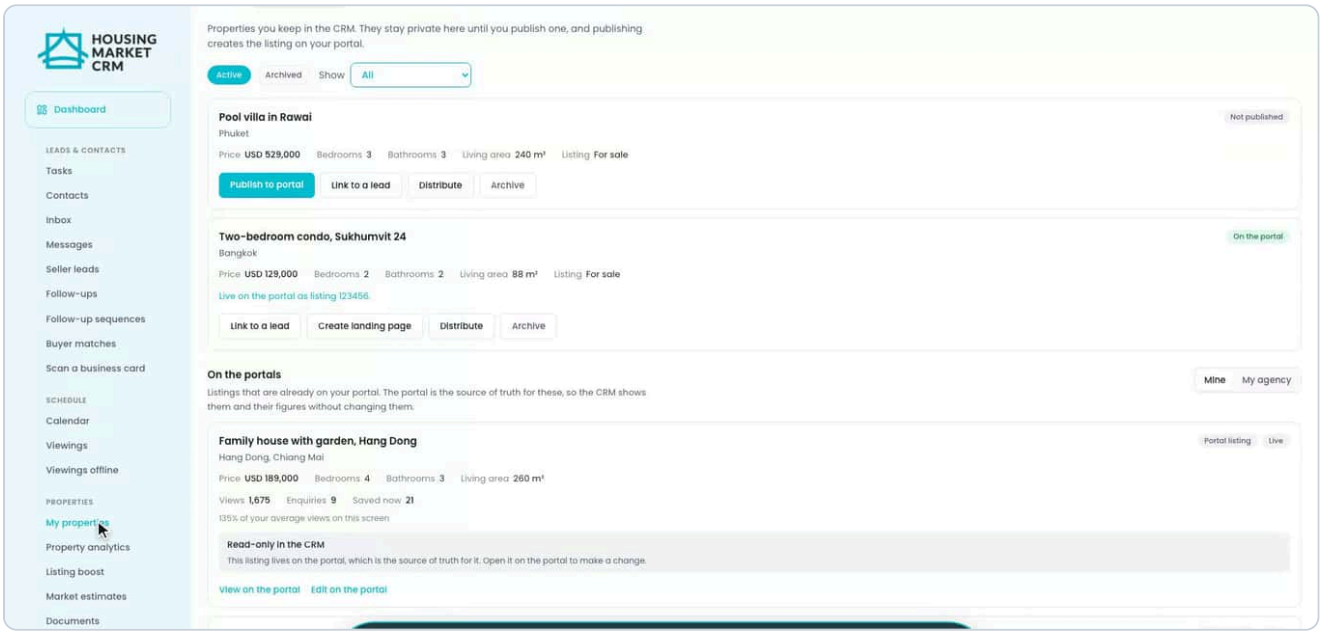


Figure 36.4 · Screen recorded 16 October 2026

5 Each one is marked **Portal listing**, with its portal status.

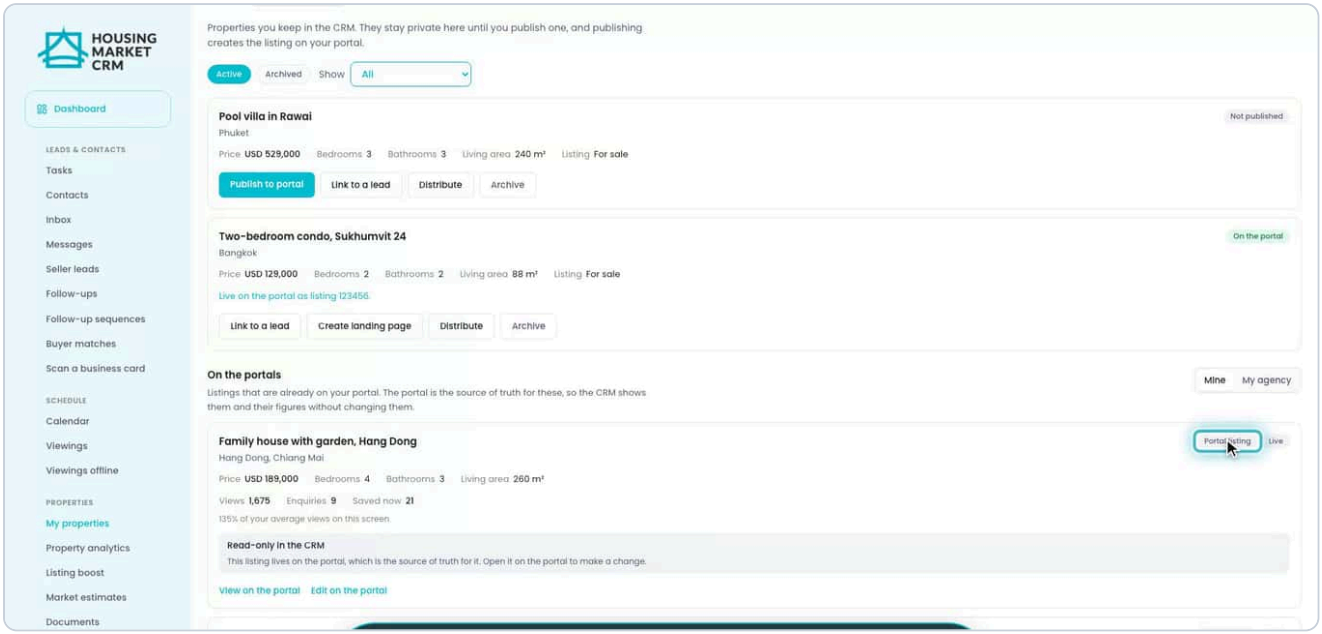


Figure 36.5 · Screen recorded 16 October 2026

6 **Views**, **enquiries** and how many buyers have it **saved now**.

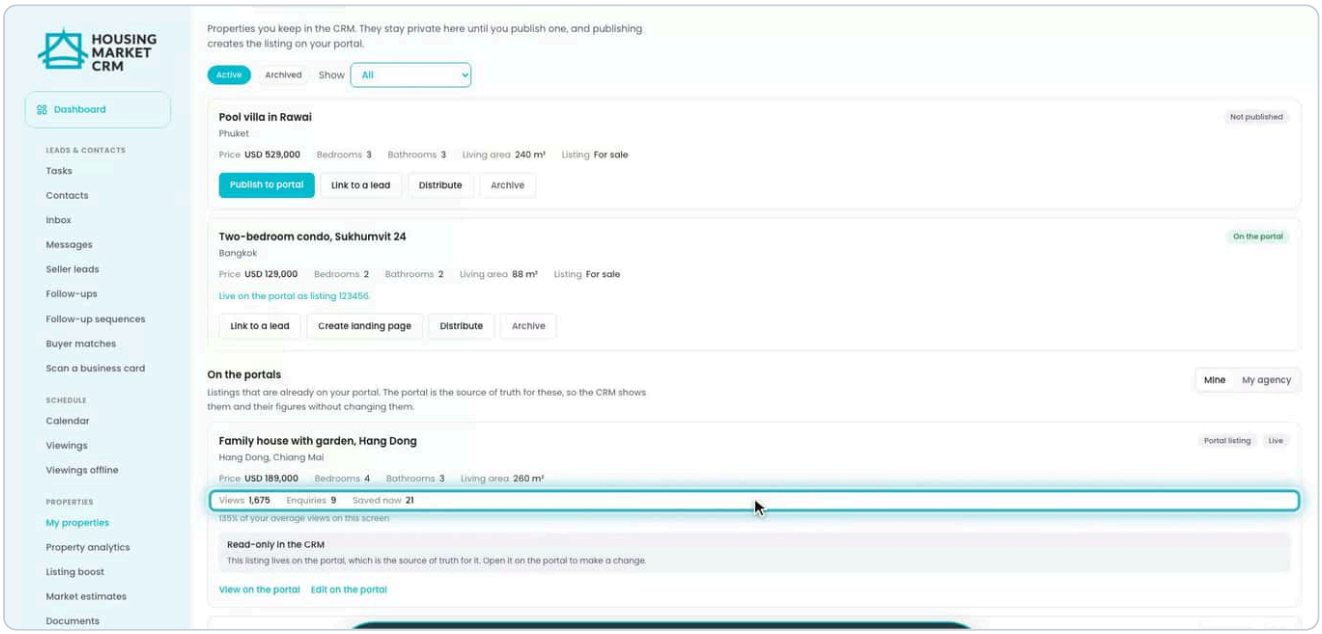


Figure 36.6 · Screen recorded 16 October 2026

7 Compared with the **average** of the listings on screen.

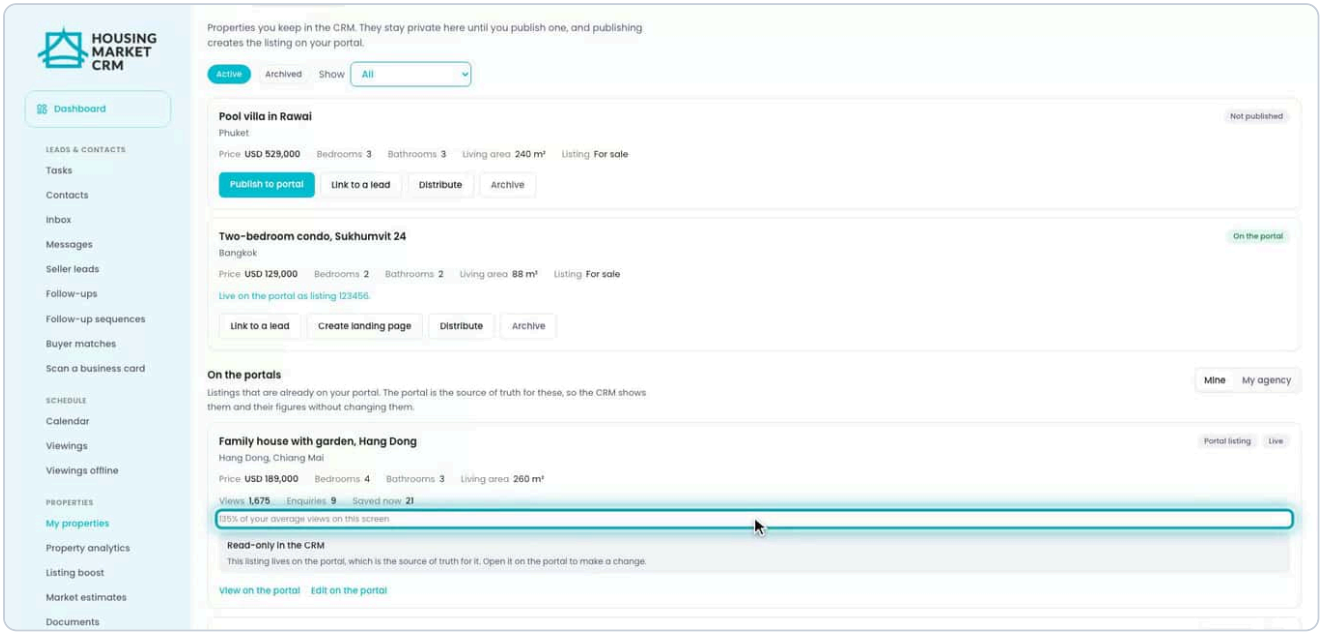


Figure 36.7 · Screen recorded 16 October 2026

8 The portal is the **source of truth**, so these are **read-only** here.

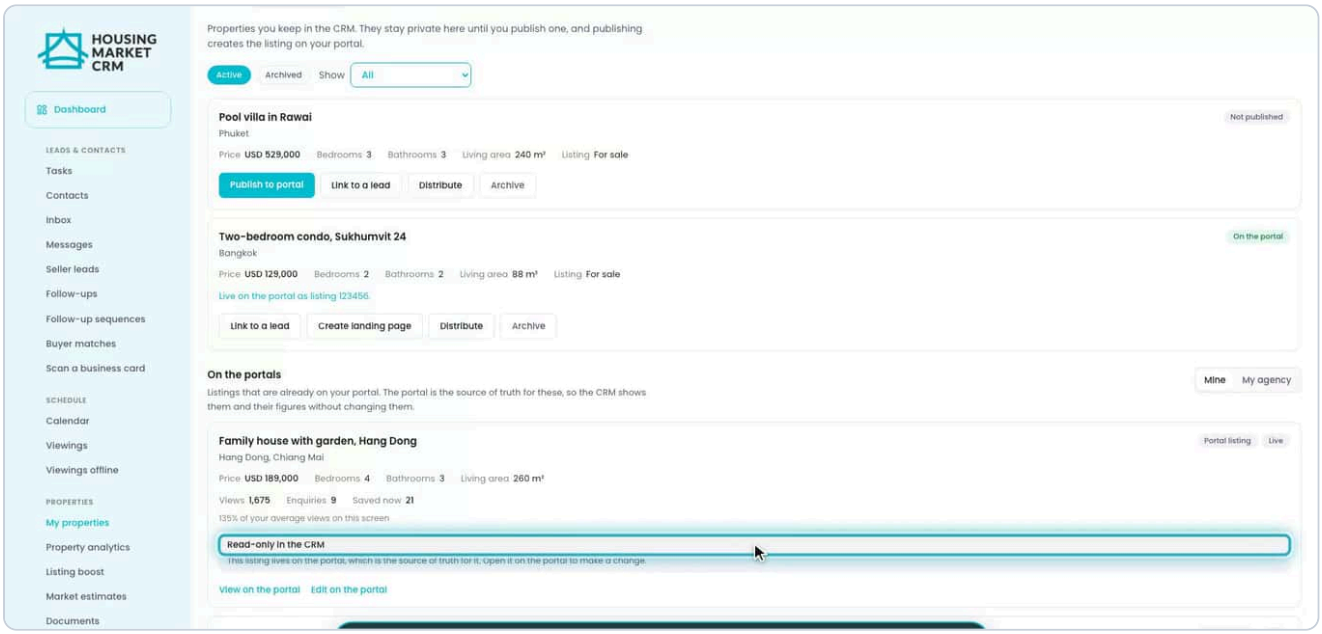


Figure 36.8 · Screen recorded 16 October 2026

9 To change one, use **Edit on the portal**.

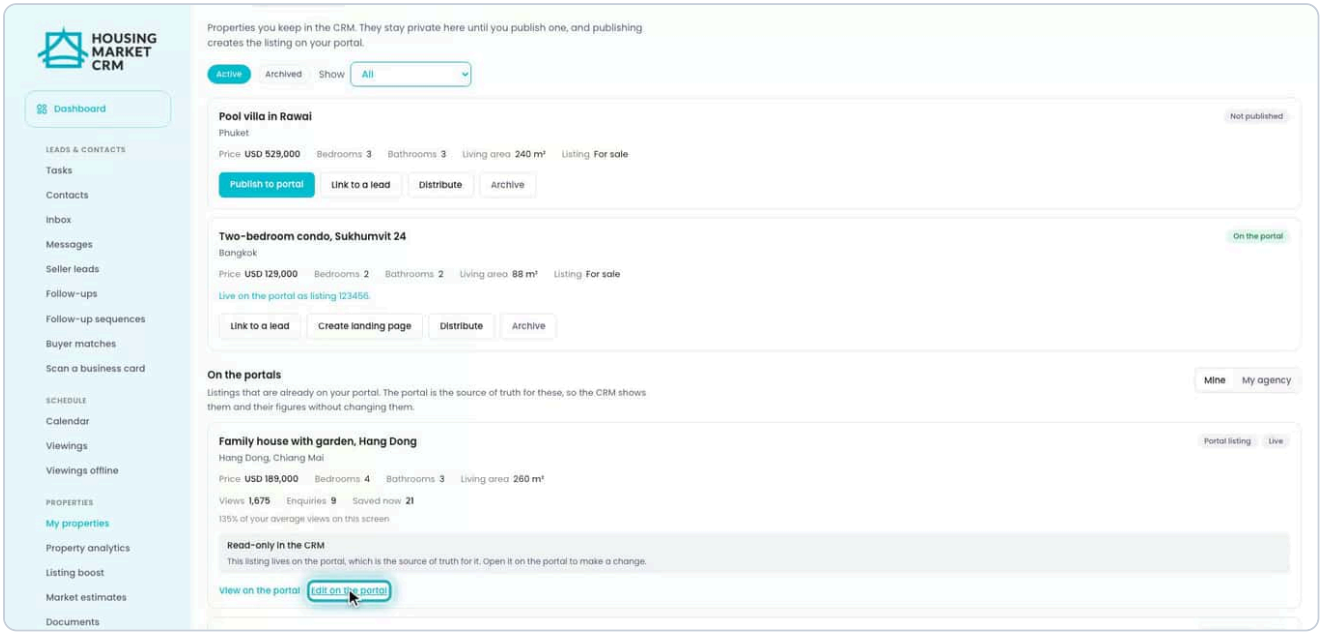


Figure 36.9 · Screen recorded 16 October 2026

10 Click **My agency** to see the whole office.

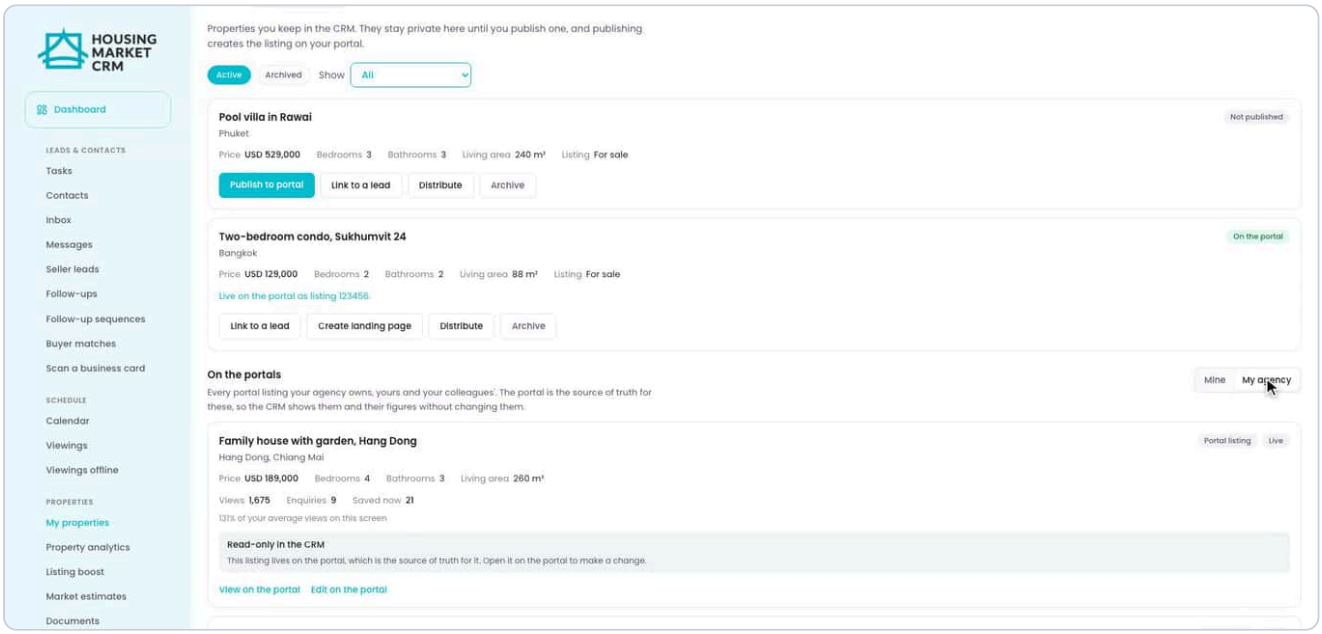


Figure 36.10 · Screen recorded 16 October 2026

11 Your colleagues' portal listings, with **their figures** too.

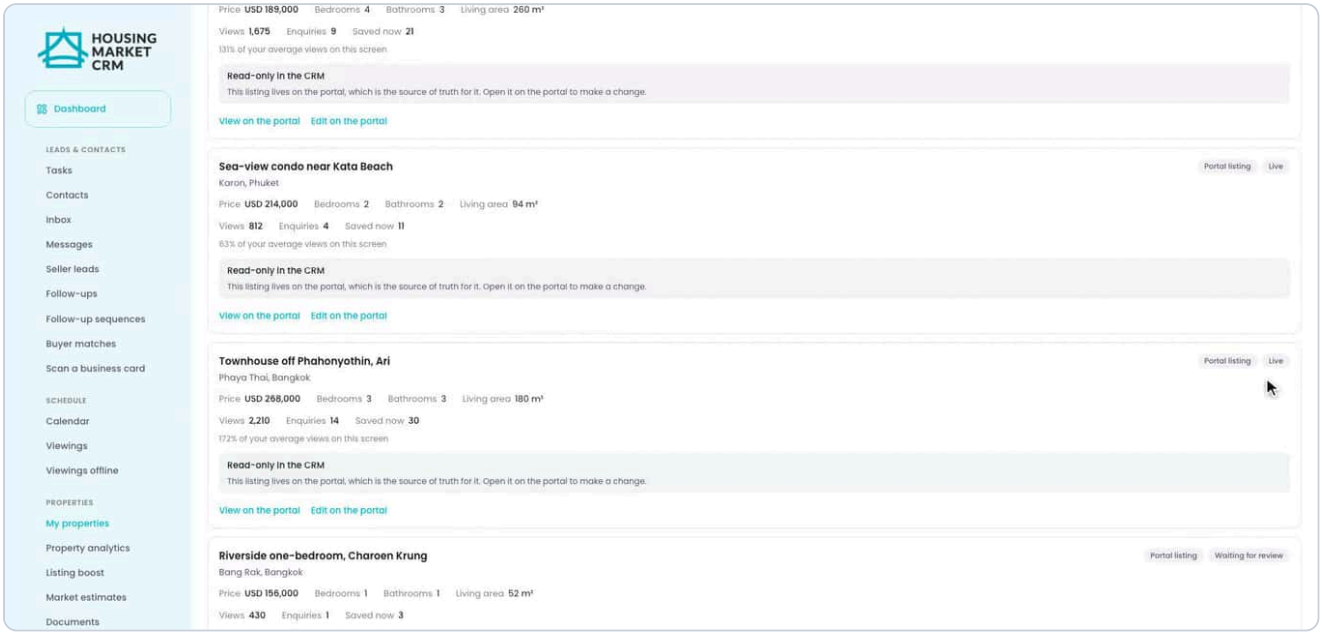


Figure 36.11 · Screen recorded 16 October 2026

12 Click **Mine** to go back to your own.

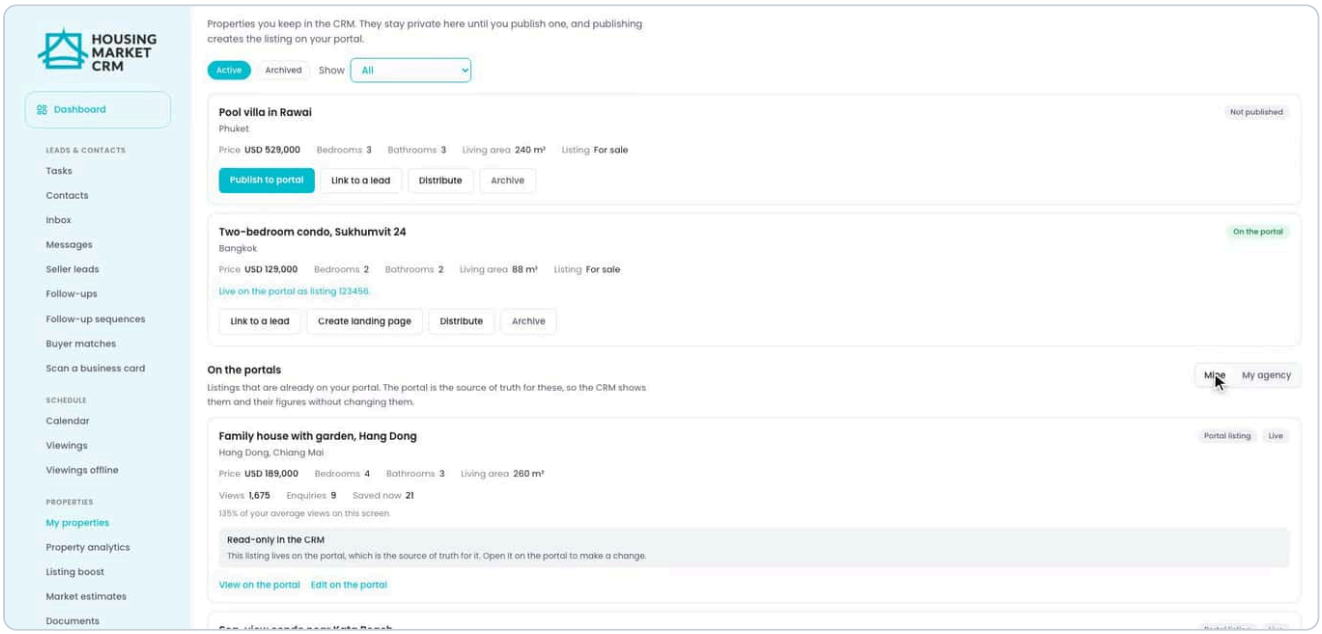


Figure 36.12 · Screen recorded 16 October 2026

RELATED HELP CENTER ARTICLES

Is the CRM integrated with Housing Market Group?	faq.housingmarketgroup.com/faq/is-the-crm-integrated-with-housing-market-group
Can I manage my property listings?	faq.housingmarketgroup.com/faq/can-i-manage-my-property-listings
Where do my listing's viewers come from?	faq.housingmarketgroup.com/faq/where-do-my-listing-viewers-come-from

37 CHAPTER 37

Archive and restore a property

All plans | For agents | Watch the video

OVERVIEW

It is archived. The record leaves your lists and stays in the database, and the archive is a place to put things rather than a stage on the way to deletion. A short list of smaller rows is still removed outright, and this answer names them.

Nothing you delete in the CRM is destroyed. A delete archives the record: it leaves the lists you work from and stays in the database, with the date it was archived and who archived it. The archive is a place to put things, not a stage on the way to deletion — there is no timer and nothing is waiting to erase it.

What archives

- A contact. It leaves Contacts and keeps everything on it: its follow-ups, comments, activity, files, tagged properties, phone numbers, addresses, messages and conversations, and the leads and calendar entries that outlive it.
- The contact you do not keep in a merge. Everything attached to it moves to the survivor and the record itself is archived, naming the contact its history went to.
- A lead. It leaves the board and the lists, and keeps its timeline, comments, files and follow-ups. It also stops being nagged about and stops counting against whoever it was assigned to, which an archive that only hid it would not.
- A property, and a unit you manage for an owner. Both have had their own archive for longer than the rest.
- A deal, with the commission each party has a claim on.
- A colleague's seat. Their access ends the moment it is archived, the seat you pay for is freed, and the record that they held it — and at what grade — is kept, so "who handled this lead" is still answerable after they leave.

Getting one back

Contacts, properties, deals and managed units each have their archive on the screen: an Archived tab or Show archived finds the record, and Unarchive or Restore puts it back where it was. A restored record comes back whole rather than as a copy.

Leads and seats are archived in the same way, but the CRM has no archived view for either of them yet, so there is no button for you to press. The record is in the database and support can bring it back — ask them rather than re-entering the lead, because re-entering it would lose the timeline that was kept.

Putting a colleague back is the ordinary Add a seat: an agent who once held a seat is reinstated rather than given a second one, and the audit log records the reinstatement and the office they were in before.

What a delete does not do

It does not relax who may press it. Deleting still takes a manager with the right to delete, and removing a seat still takes an admin, because the permission belongs to the outcome the agent intends rather than to how it is implemented. The account's audit log records the action as an update naming the archive, not as a deletion — a permanent history claiming a record was destroyed when it is one flag away from being back on screen would be worse than no history.

Removing a seat also changes nothing about your bill on its own. Only the account owner changes how many seats the office pays for, on Plan and billing.

What is still removed outright

This is the part worth reading before you rely on the rest. The records below are deleted rather than archived today, so treat a delete on one of them as final:

- A document you delete from the vault. Archiving a document is a separate action and is the one to use; a signed document cannot be deleted by anybody.
- A lease.
- A follow-up, and a follow-up sequence.
- A milestone on a deal.
- A calendar entry.
- A WhatsApp message template.
- A connection to an outside service, and the webhooks and API keys on the open API.
- The rows behind a client portal share — a shortlist, a seller listing or a feedback note.

None of those is a person, a property or a colleague, which is where this work drew its line. They are named here rather than left out so that nobody reads "a delete archives" as covering more than it does.

Cancelling a plan is not a delete either

When a paid plan ends the account returns to the free plan and nothing is removed: the core CRM keeps working and your leads, contacts and history are where you left them. See "How do I upgrade, add users or cancel?".

From the Help Center: **What happens when I delete a contact, a lead or a colleague?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

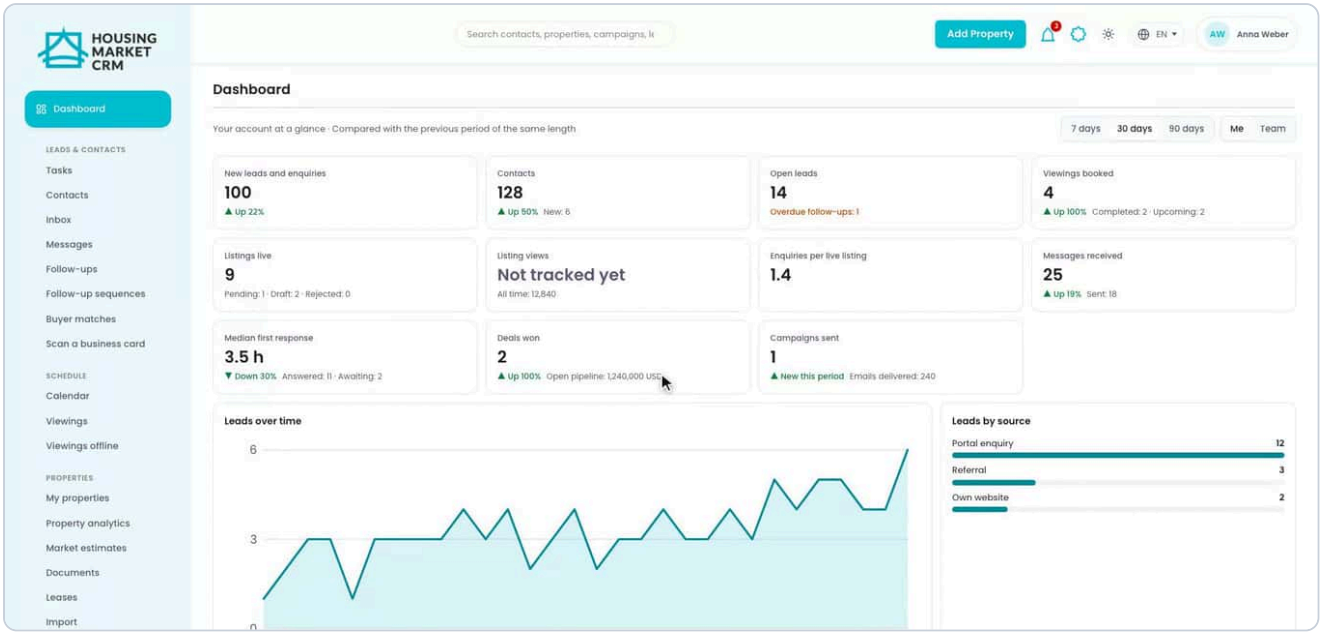


Figure 37.1 · Screen recorded 24 September 2026

2 Click **My properties** in the left menu.

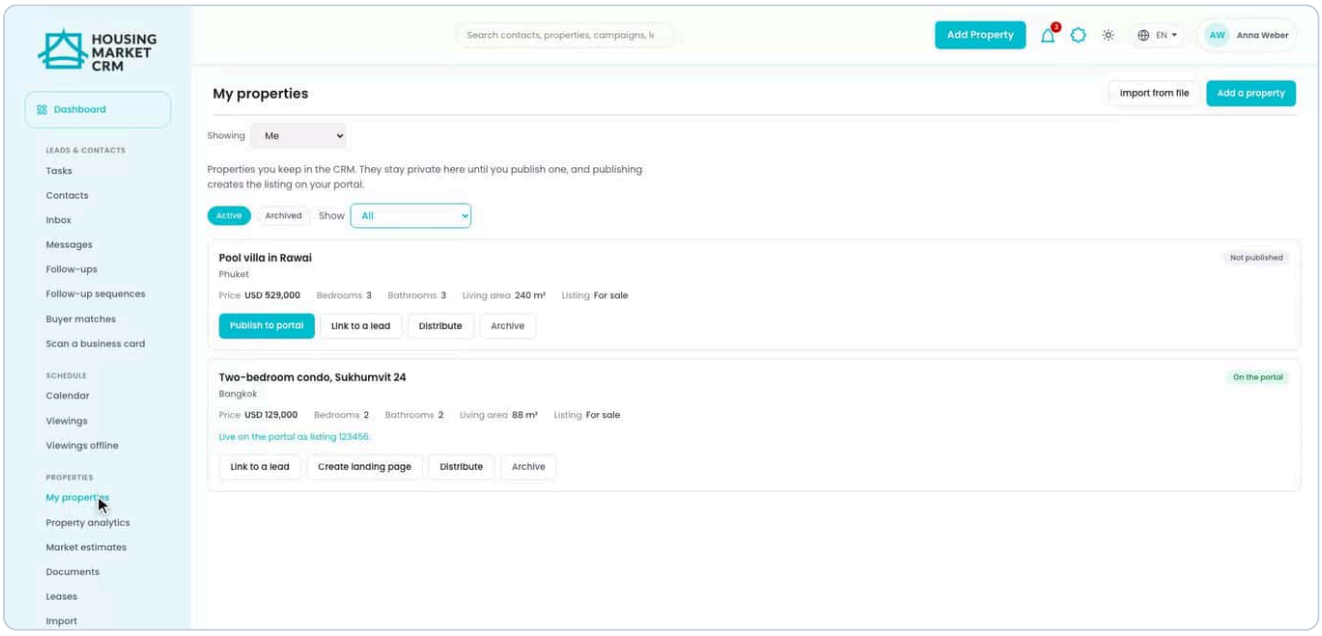


Figure 37.2 · Screen recorded 24 September 2026

3 Your list has two tabs: **Active** and **Archived**.

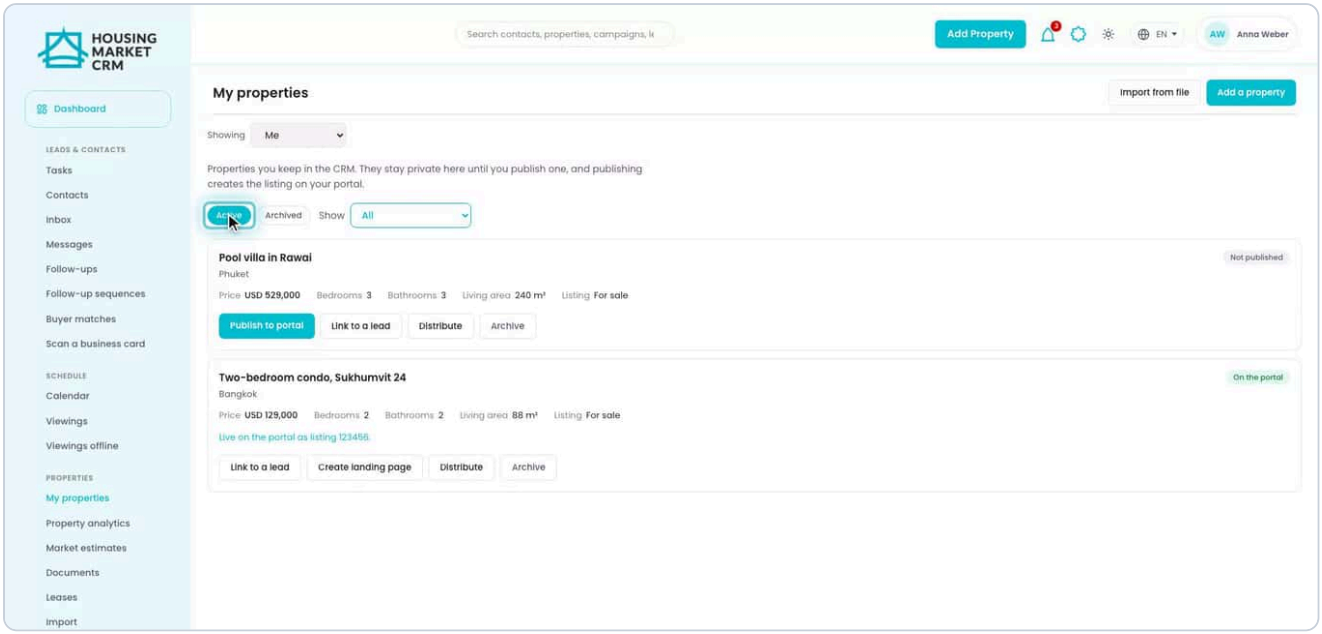


Figure 37.3 · Screen recorded 24 September 2026

4 This condo is sold, so it does not belong on the active list.

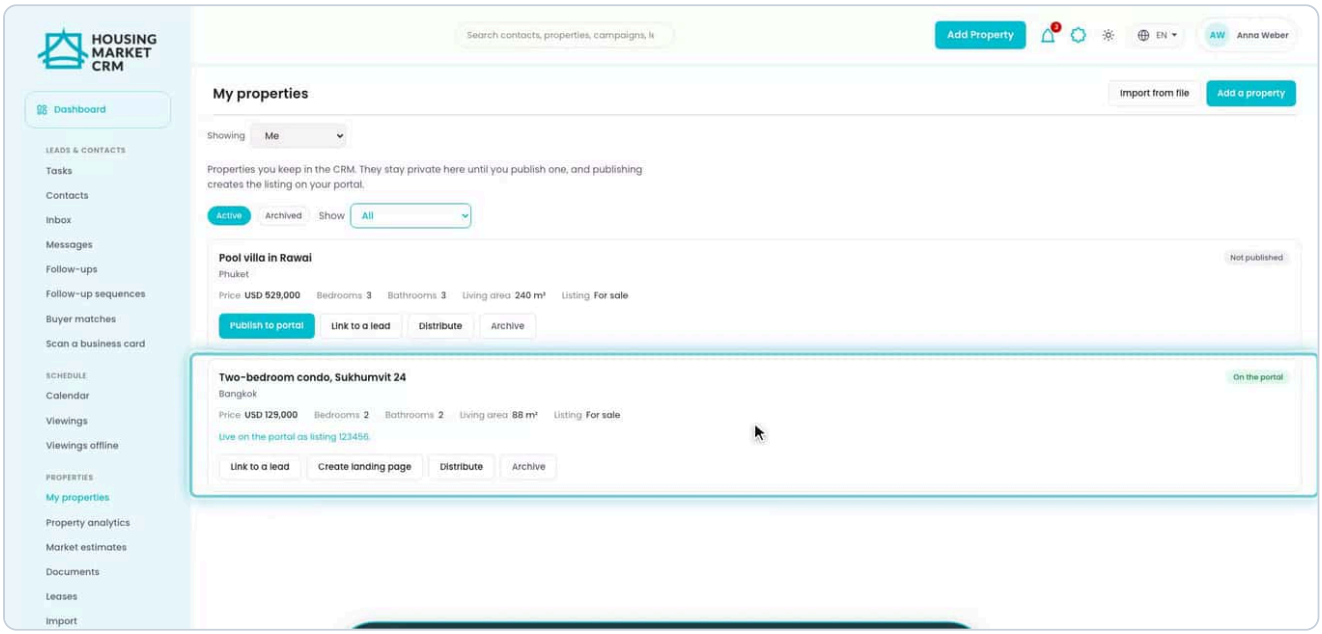


Figure 37.4 · Screen recorded 24 September 2026

5 Click **Archive** on its card.

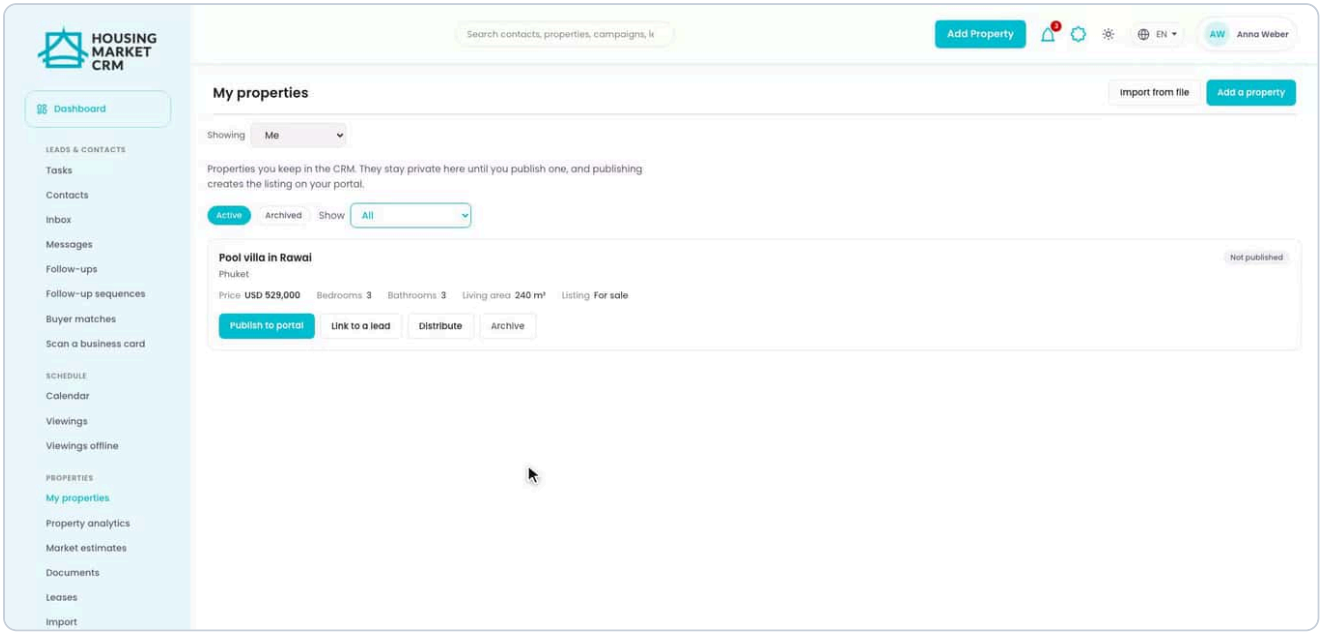


Figure 37.5 · Screen recorded 24 September 2026

6 **Archiving...** — and it leaves the list. Nothing is deleted.

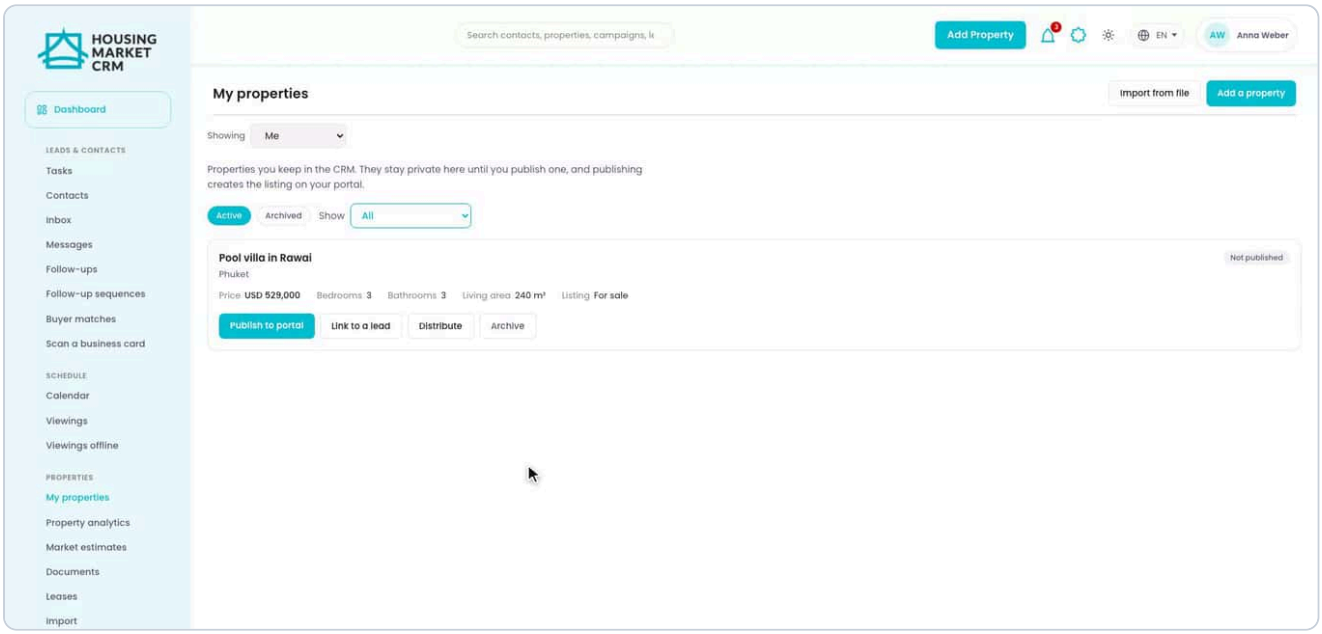


Figure 37.6 · Screen recorded 24 September 2026

7 Open the **Archived** tab.

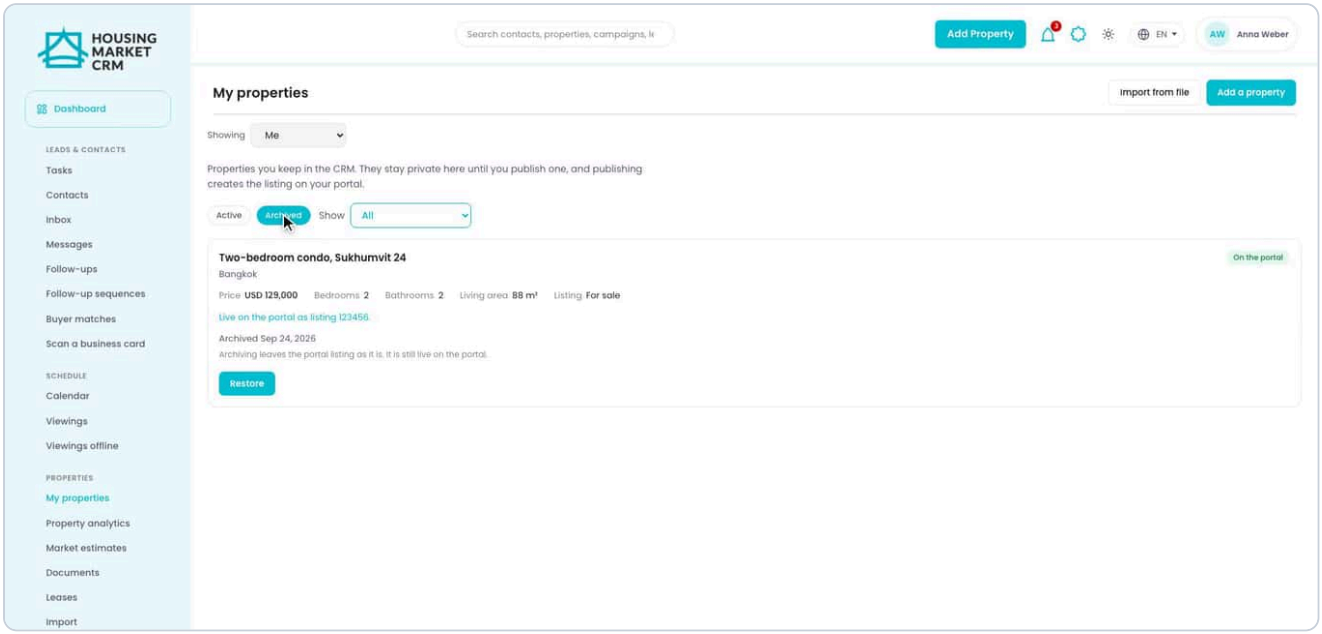


Figure 37.7 · Screen recorded 24 September 2026

8 The card notes the **date** it was archived on.

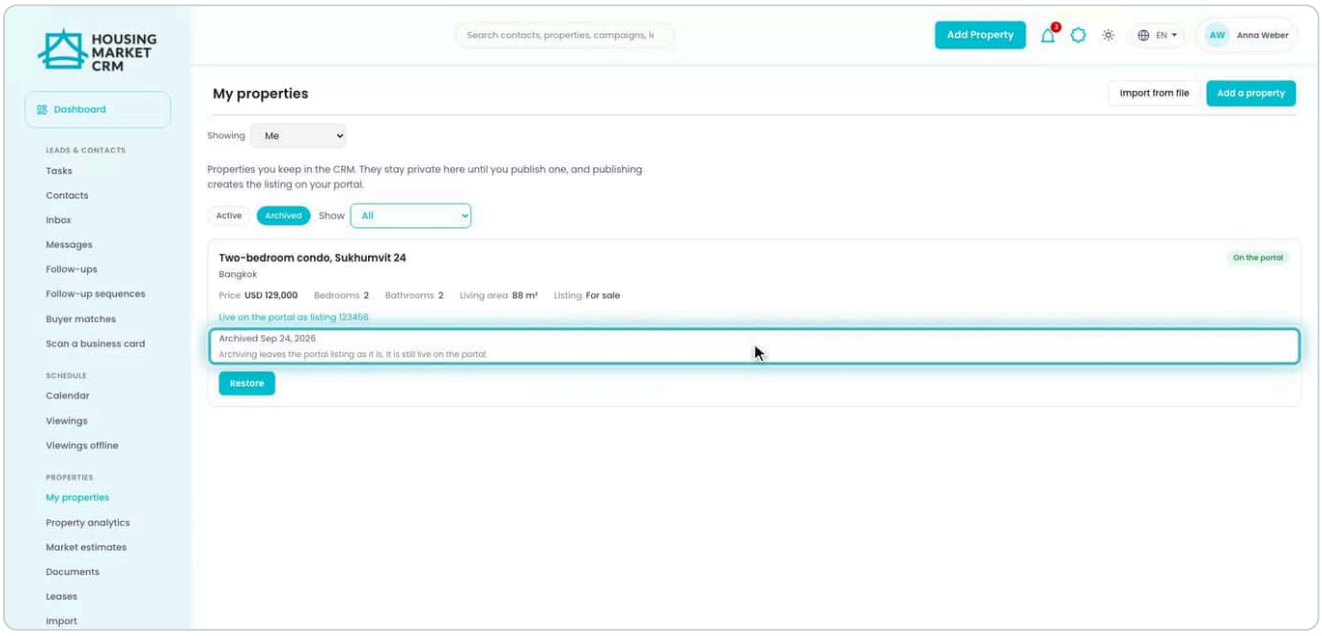


Figure 37.8 · Screen recorded 24 September 2026

9 And the line that matters: the **portal listing is untouched**.

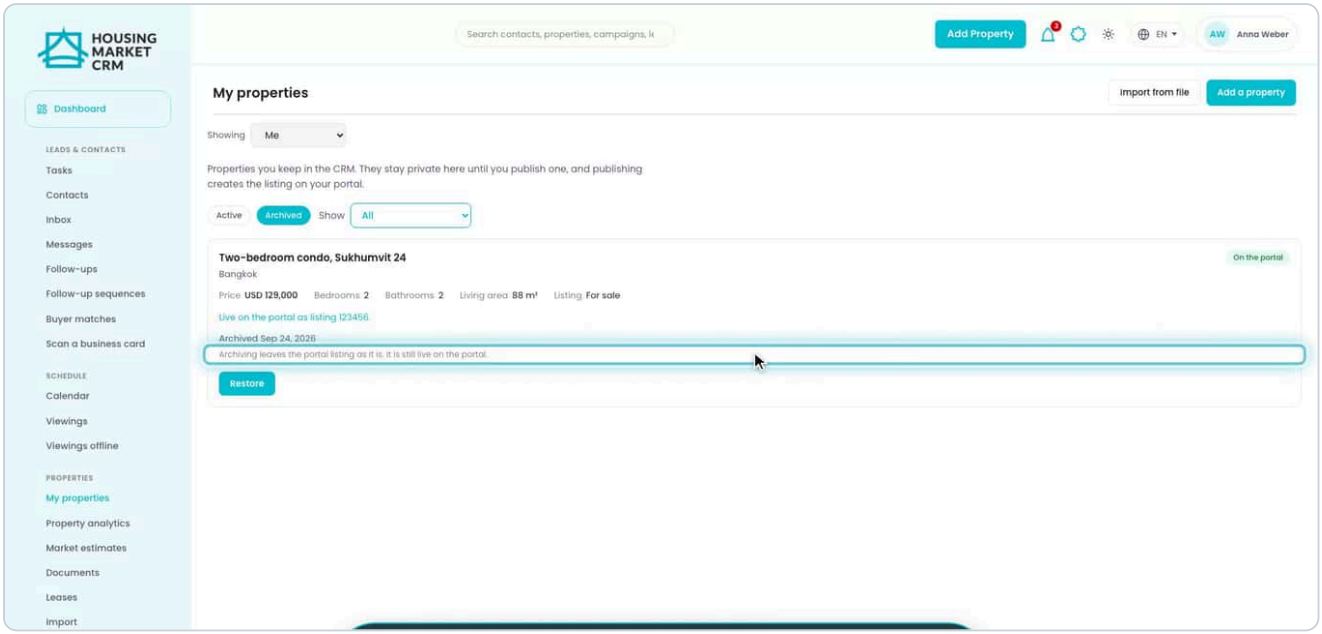


Figure 37.9 · Screen recorded 24 September 2026

10 It is **still live on the portal** until you withdraw it there.

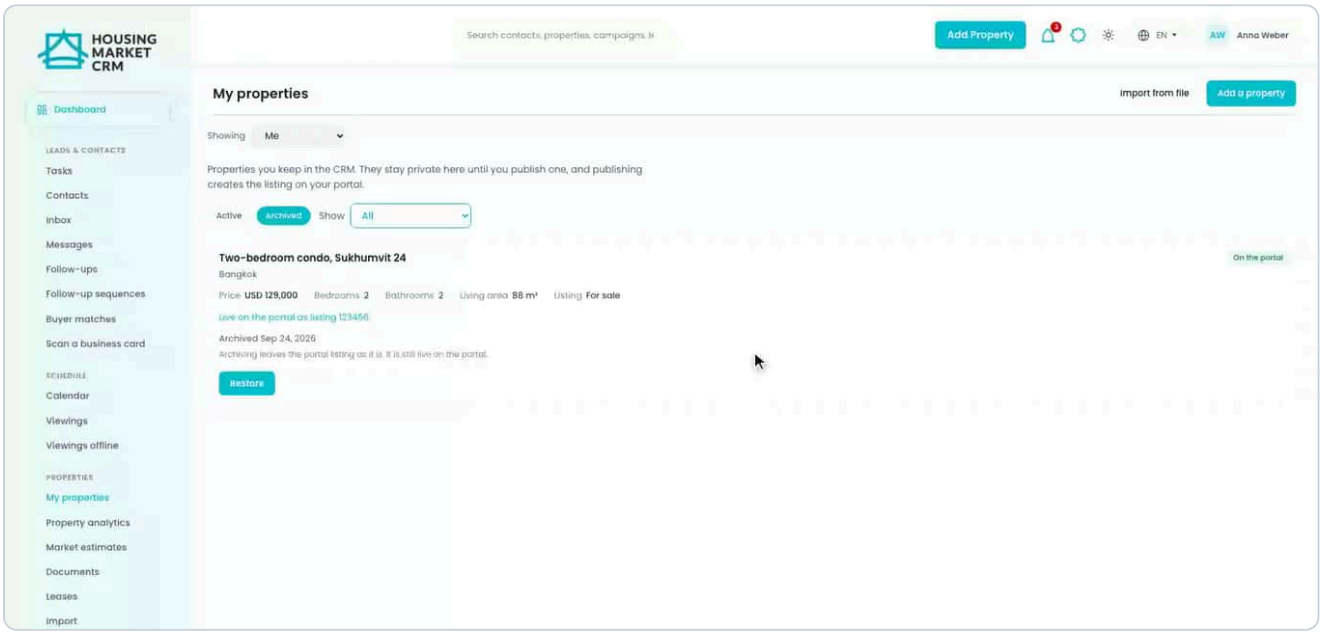


Figure 37.10 · Screen recorded 24 September 2026

11 Changed your mind? Click **Restore**.

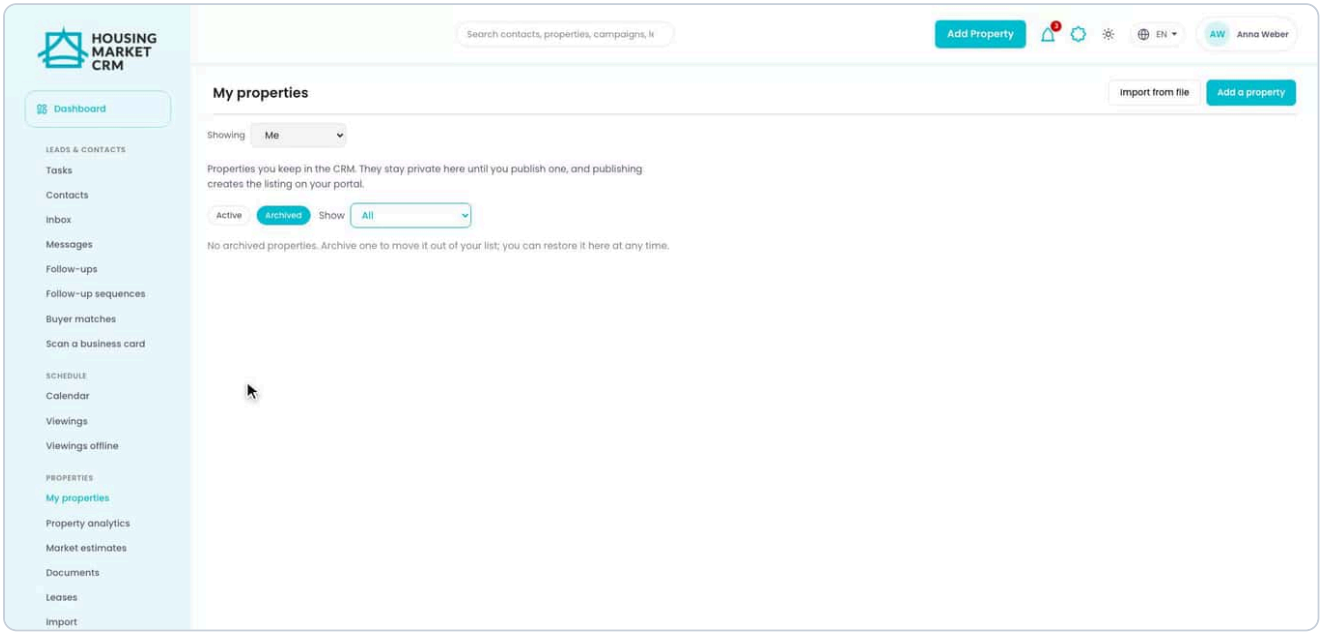


Figure 37.11 · Screen recorded 24 September 2026

12 The archive is **empty** again.

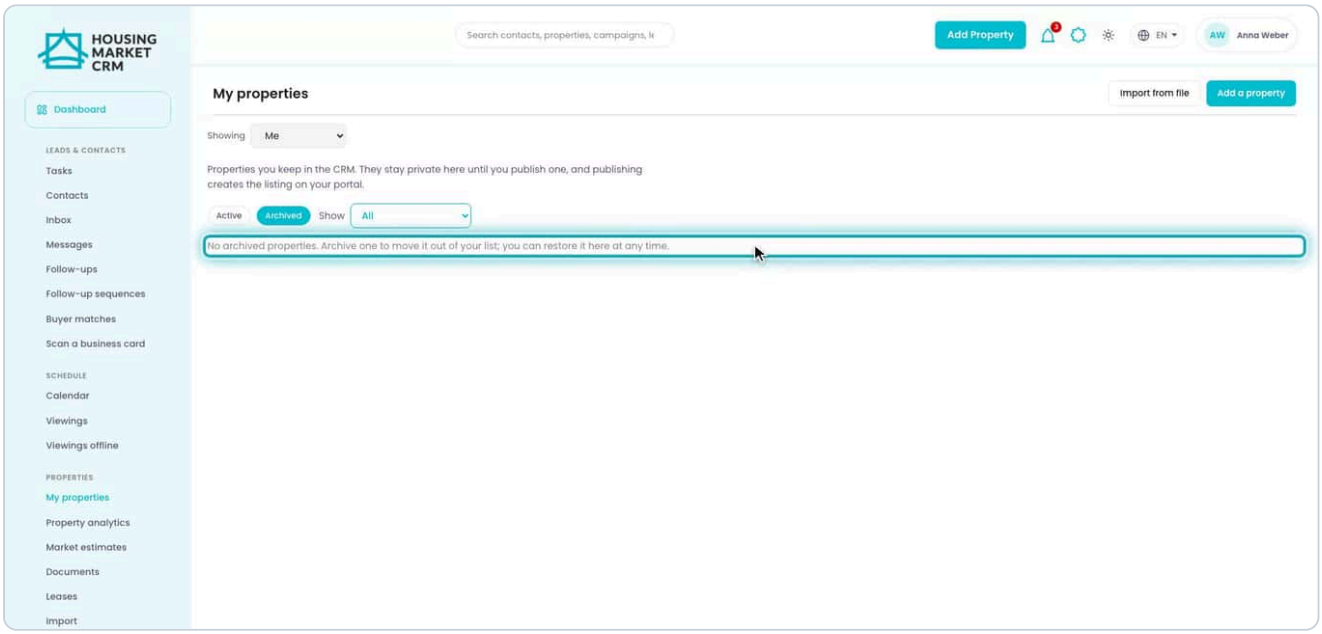


Figure 37.12 · Screen recorded 24 September 2026

13 Back on **Active** the listing is back, **exactly as it was**.

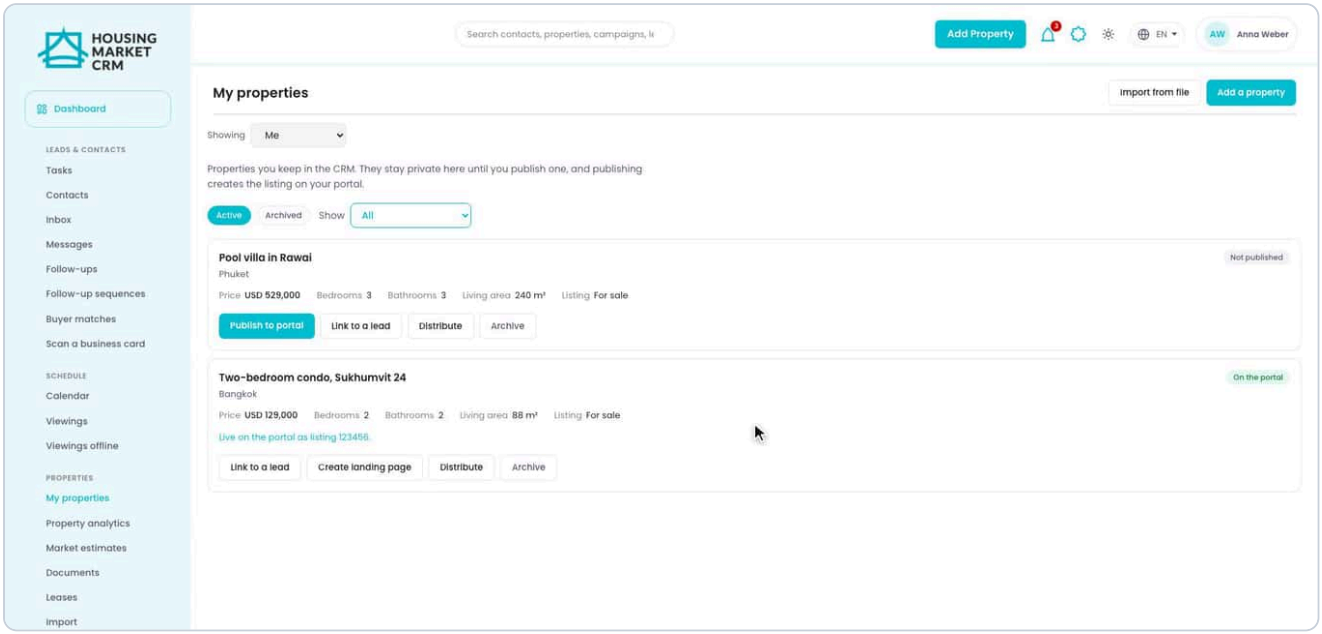


Figure 37.13 · Screen recorded 24 September 2026

GOOD TO KNOW

NOTE

You can keep a property in the CRM on any plan, and on Pro publish it to the portal for the country it is in. Once it is live, editing its main details in the CRM changes the portal listing too, and a property you put away is archived rather than deleted.

Help Center: Can I manage my property listings?

38 CHAPTER 38

Property statistics

All plans | For agents | Watch the video

OVERVIEW

Each listing's analytics page shows its viewers by country, region and city, by device, and by traffic source, as counts, on every plan.

Open a listing's analytics page. Beside its daily views, enquiries, saves and shares, it breaks its viewers down by:

- Country, region and city — the places most viewers came from
- Device — desktop, mobile or tablet
- Traffic source — how they arrived at the listing

You see counts only, never an individual viewer or anything that identifies one. The figures are brought up to date once a day, and on Pro they are included in the branded vendor report you send the owner.

From the Help Center: **Where do my listing's viewers come from?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

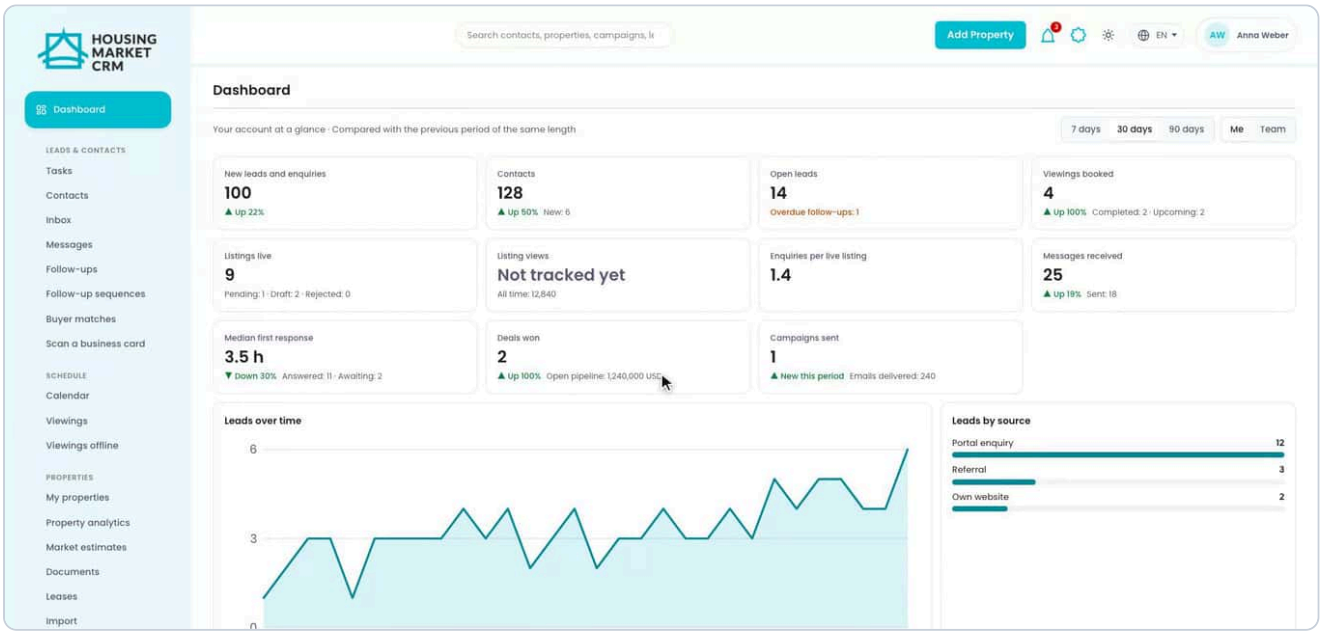


Figure 38.1 · Screen recorded 17 September 2026

2 Click **Property analytics** in the left menu.

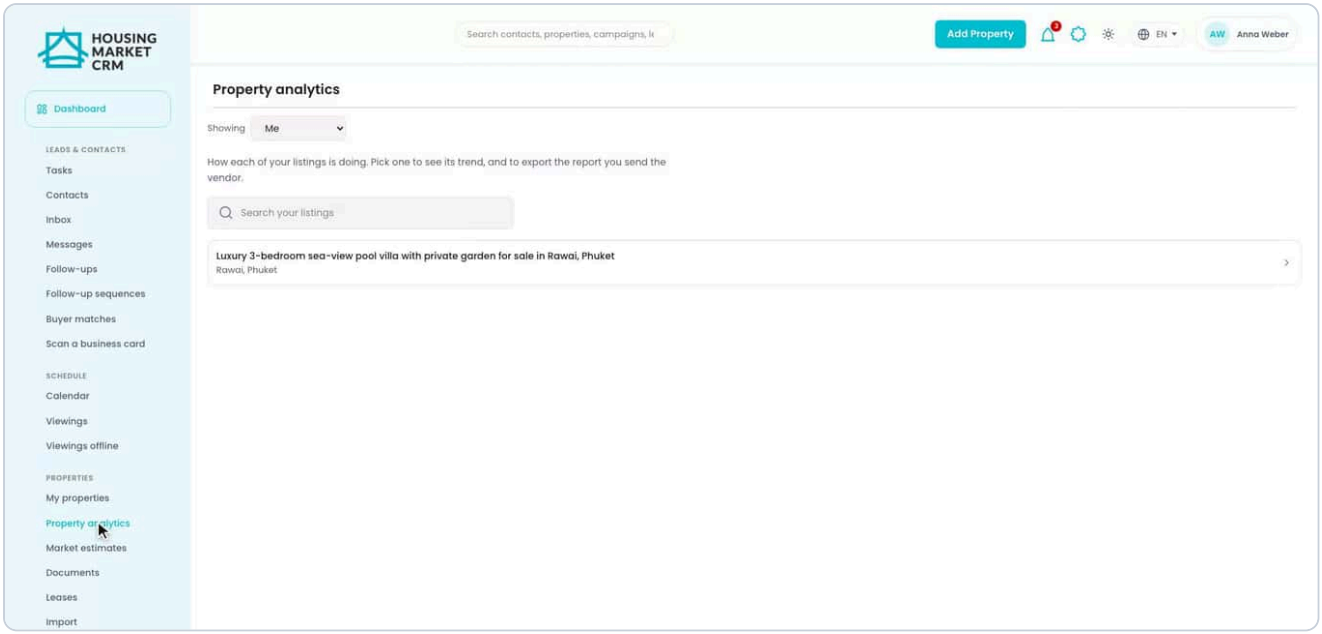


Figure 38.2 · Screen recorded 17 September 2026

3 Search your **listings**.

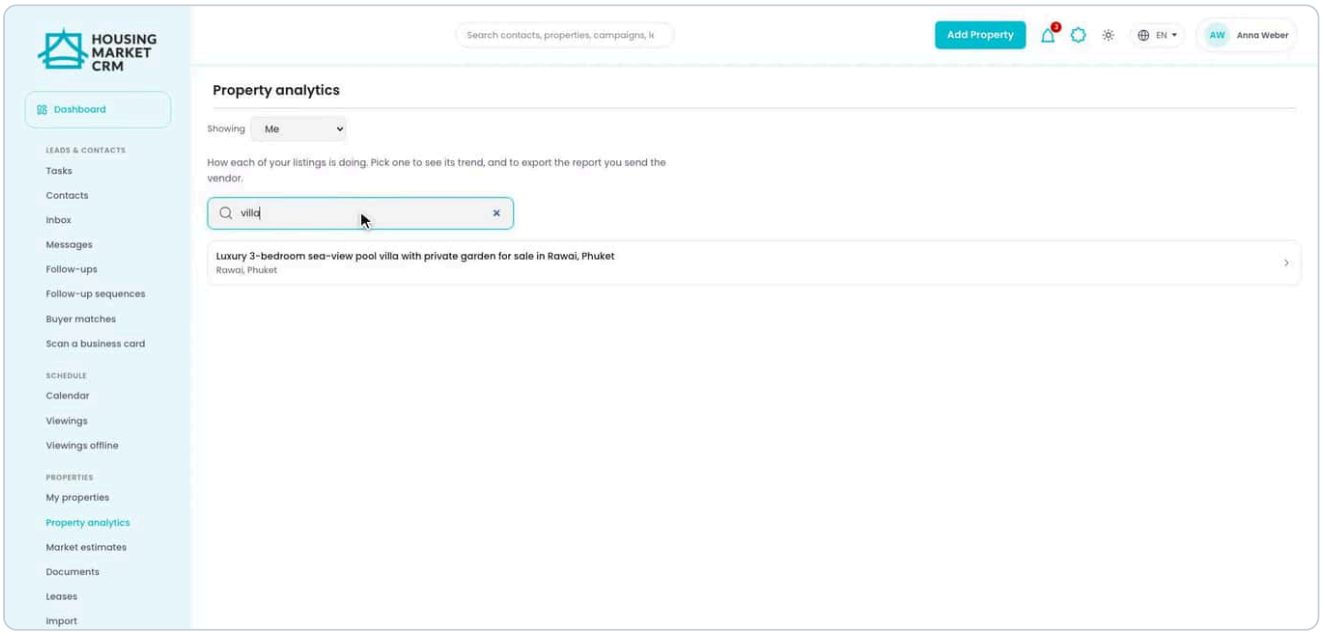


Figure 38.3 · Screen recorded 17 September 2026

4 Open one to see its figures.

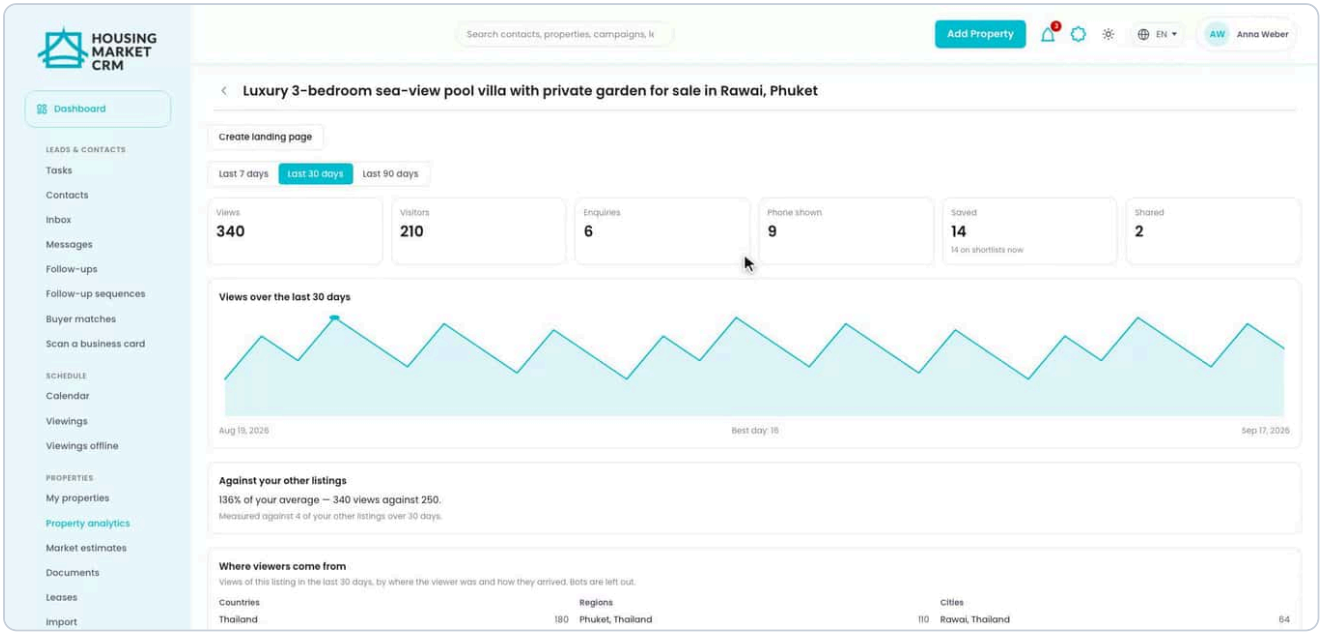


Figure 38.4 · Screen recorded 17 September 2026

5 Choose a period — 7, 30 or 90 days.

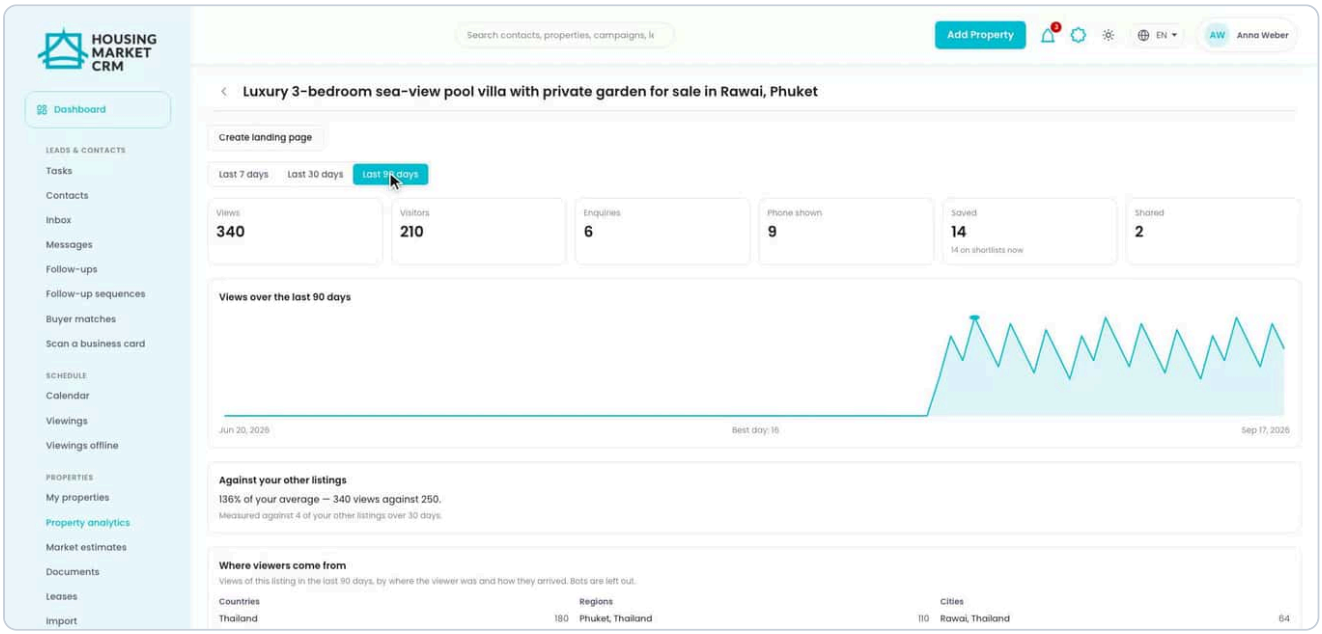


Figure 38.5 · Screen recorded 17 September 2026

6 Views and enquiries day by day.

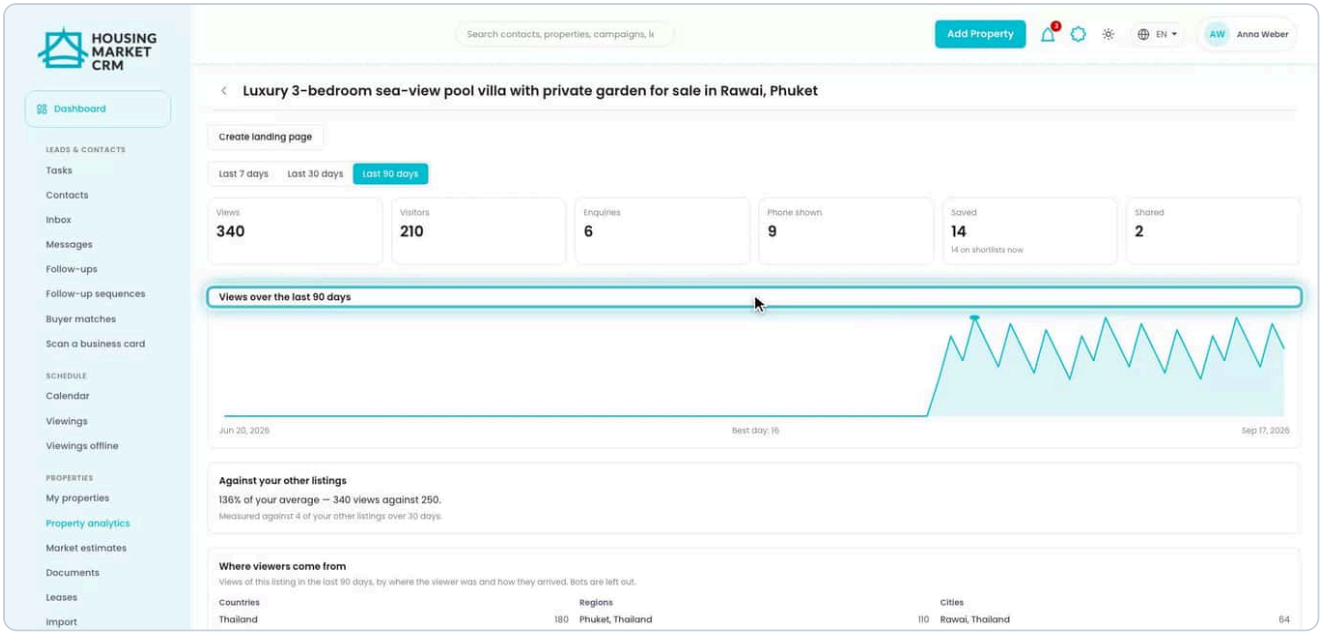


Figure 38.6 · Screen recorded 17 September 2026

7 Compare it against your other listings.

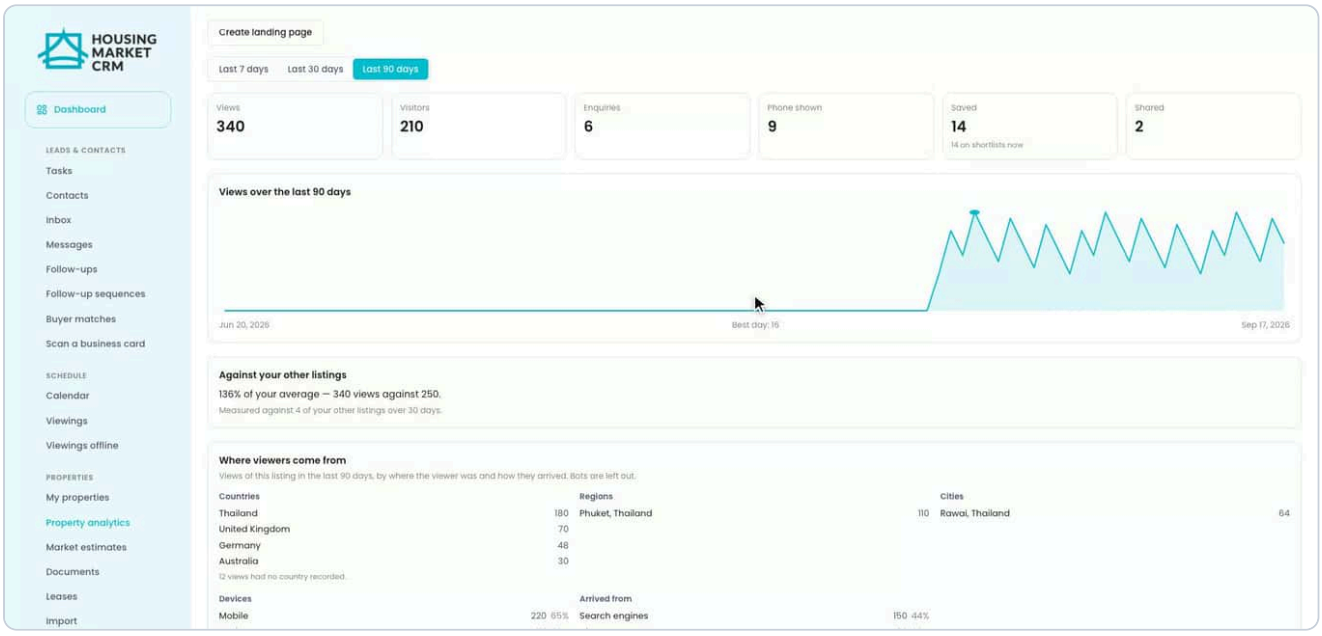


Figure 38.7 · Screen recorded 17 September 2026

8 See **countries**, **cities**, **devices** and sources.

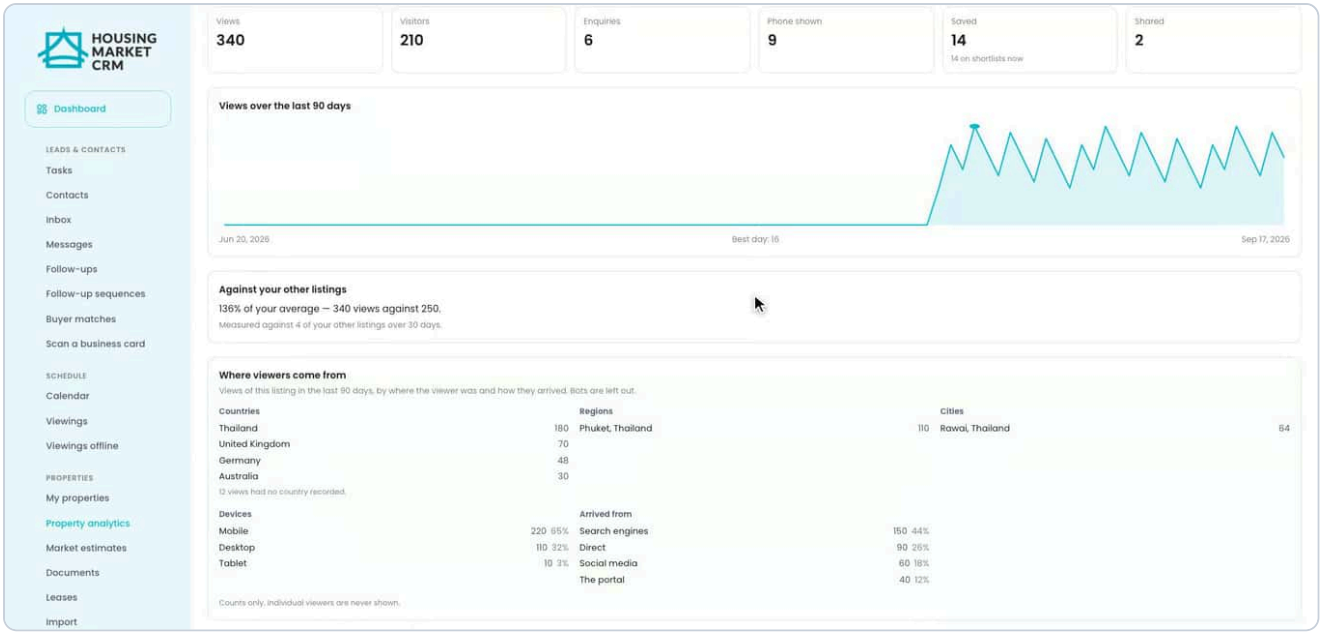


Figure 38.8 · Screen recorded 17 September 2026

9 Send the owner a **vendor report**.

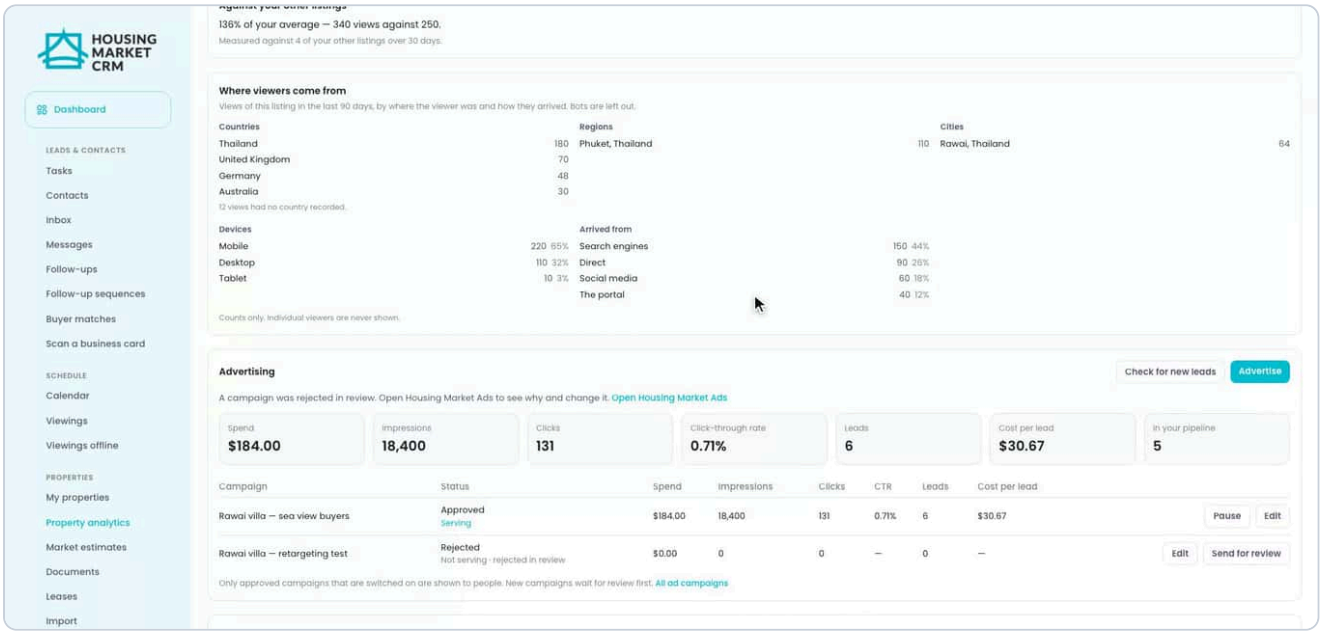


Figure 38.9 · Screen recorded 17 September 2026

10 Click **Download the report.**

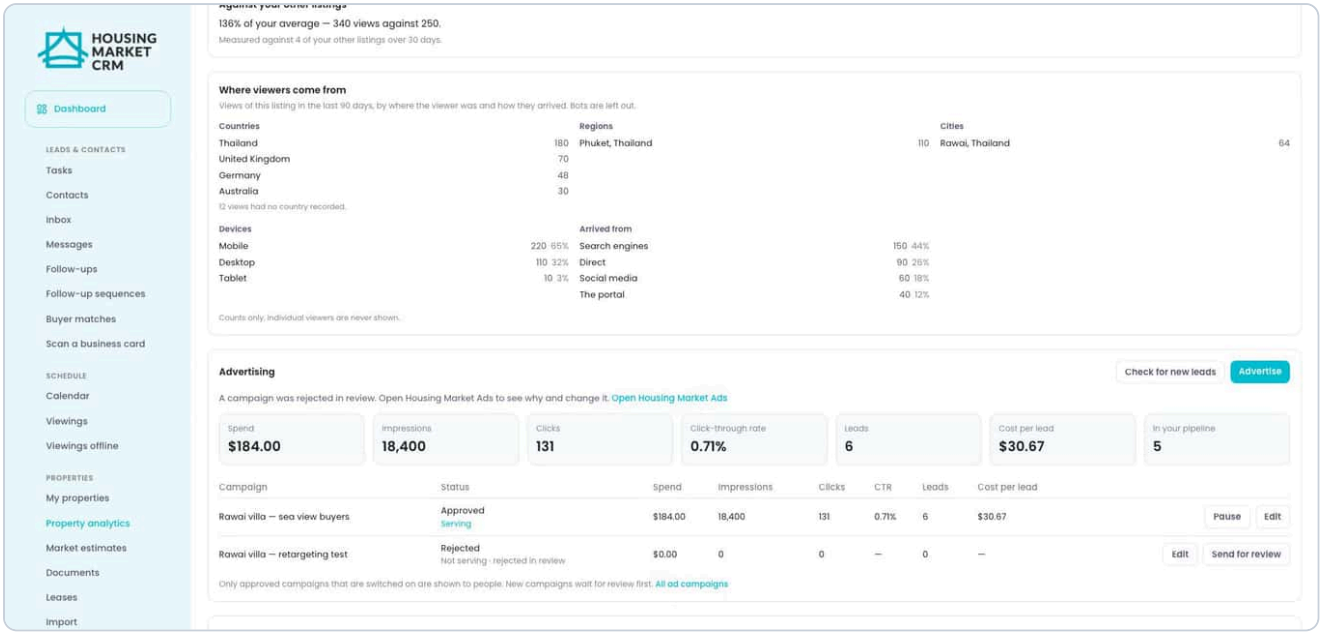


Figure 38.10 · Screen recorded 17 September 2026

GOOD TO KNOW

TIP

You get daily figures for each of your listings on every plan, and on Business a team leaderboard, a pipeline forecast and a weekly email to the owner.

Help Center: Can I monitor my performance?

39 CHAPTER 39

Bulk upload properties

Paid add-on | For agents | Watch the video

OVERVIEW

Choose Import from file in My properties and upload a CSV file or an XML feed file. It is free on every plan, every imported property arrives as a draft, and nothing is published until you publish it.

Importing properties from a file is free on every plan, the free one included, and there is nothing to buy first. An account that already has the Importer add-on keeps it as before.

- In the sidebar, open My properties and choose Import from file.
- Choose a file: a CSV or tab-separated file, or an XML property feed such as a Kyero feed. Up to 5,000 rows per file.
- Match each field to a column in the file, or choose Not in the file. The title is required.
- Choose Import properties and read the result.

Excel files are not accepted here: save the spreadsheet as CSV first, or use Import existing listings, which reads CSV and Excel files and can also read your feed once from its link, free as well. Keeping your listings in step with a feed automatically every day is a separate paid subscription, XML API Sync.

Every imported property is a draft. A publish column in the file is ignored, so nothing reaches a portal until you publish each property yourself from My properties.

This is for property listings. Contacts, leads and deals from another CRM are the Import tool, free on every plan as well — see "Can I import from another CRM?".

From the Help Center: **How do I import properties from a file?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

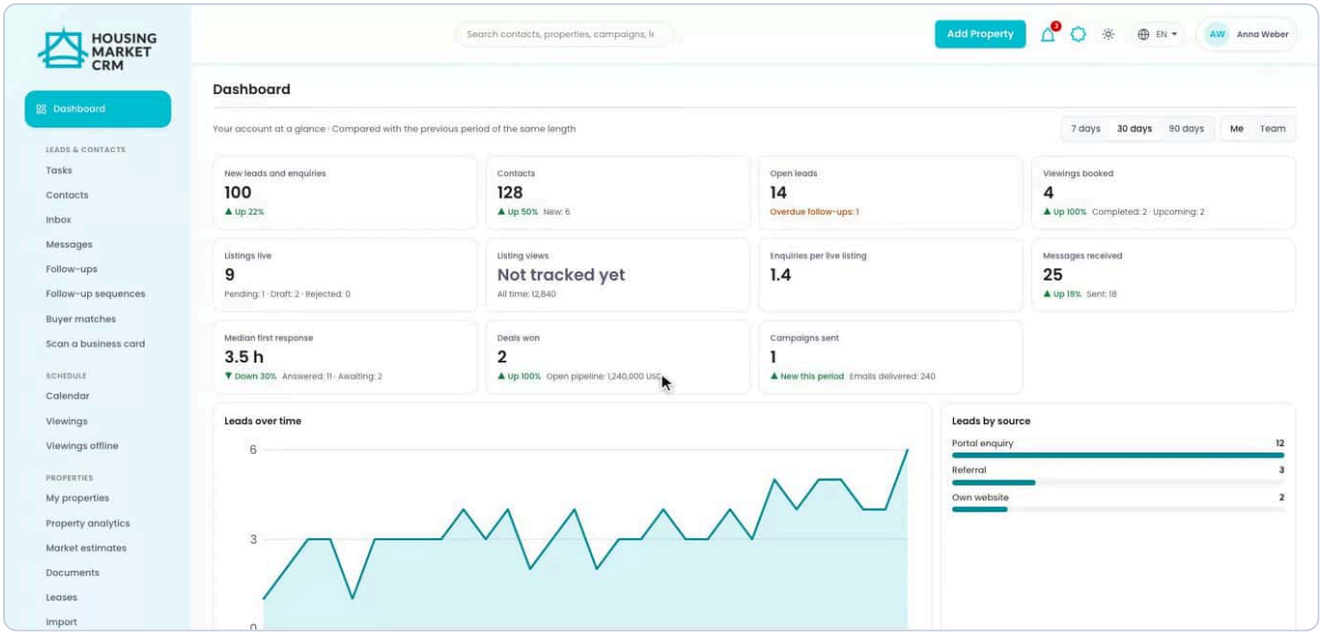


Figure 39.1 · Screen recorded 17 September 2026

2 Click **My properties** in the left menu.

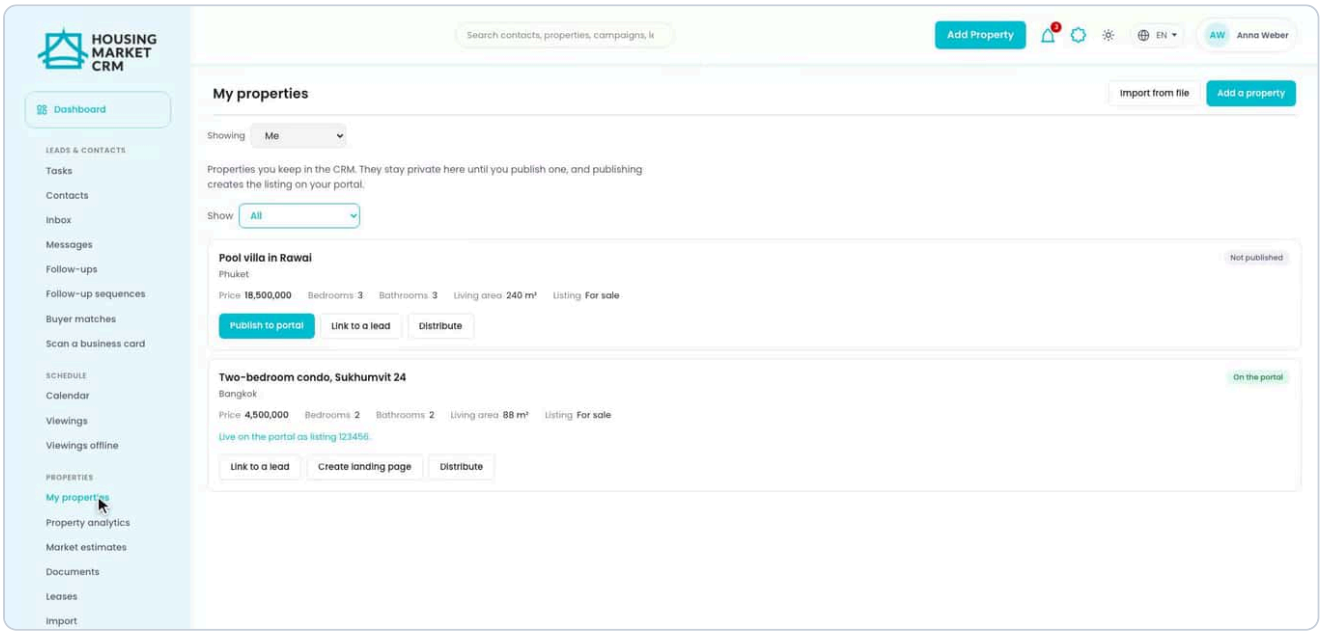


Figure 39.2 · Screen recorded 17 September 2026

3 Click **Import from file.**

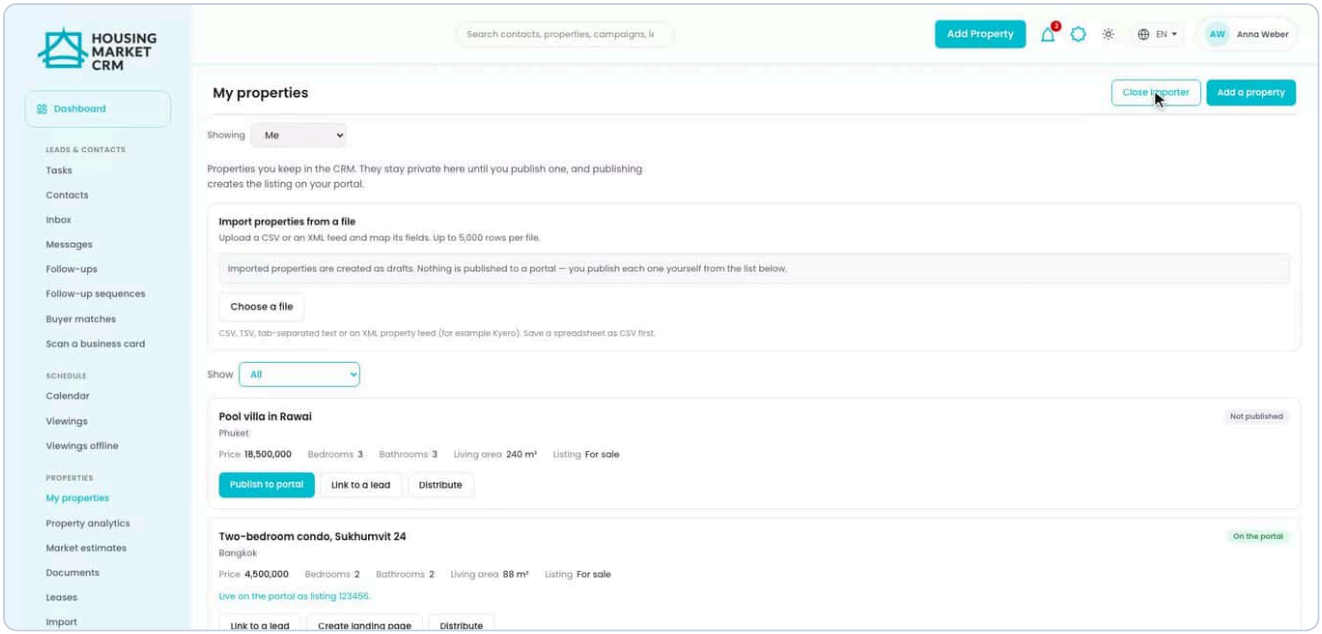


Figure 39.3 · Screen recorded 17 September 2026

4 Import many listings at once from a **CSV** file.

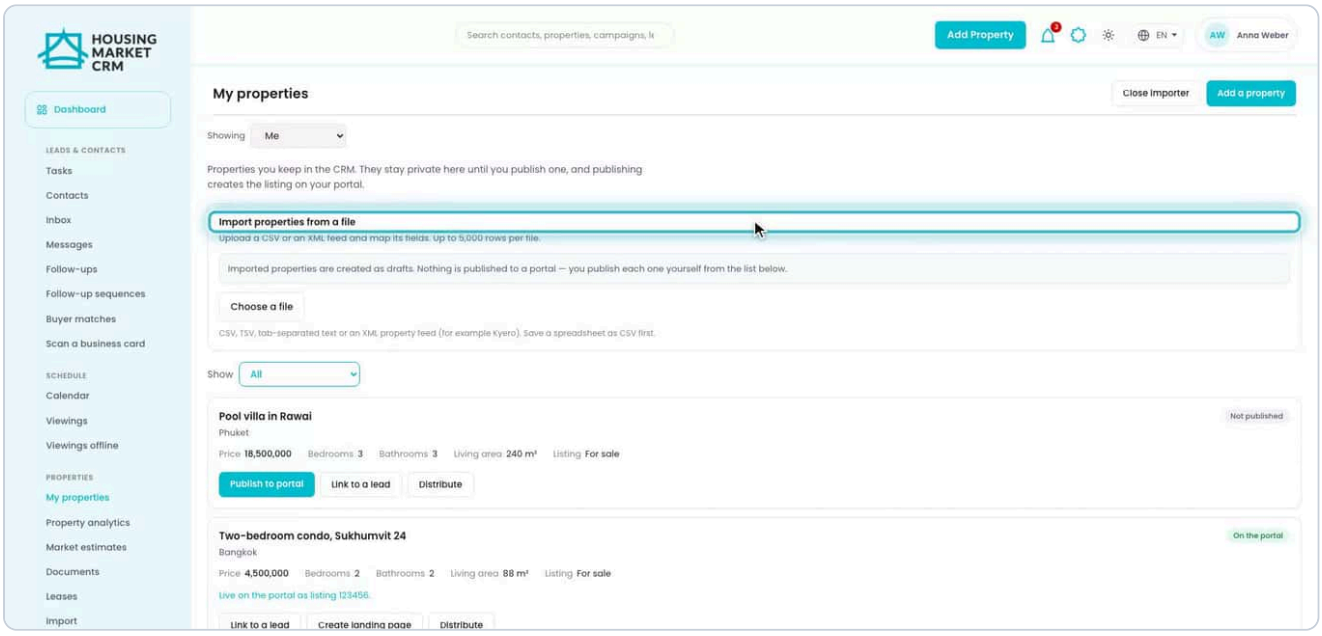


Figure 39.4 · Screen recorded 17 September 2026

5 Click **Choose a file.**

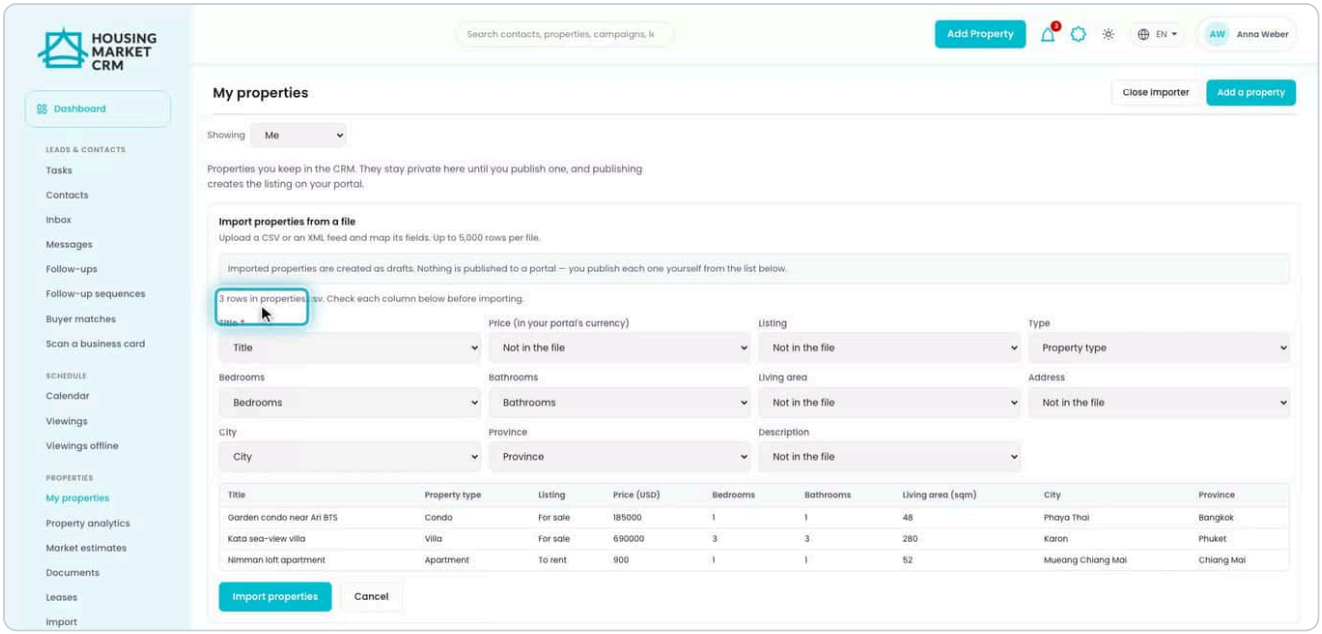


Figure 39.5 · Screen recorded 17 September 2026

6 Check that each **column** matches the right field.

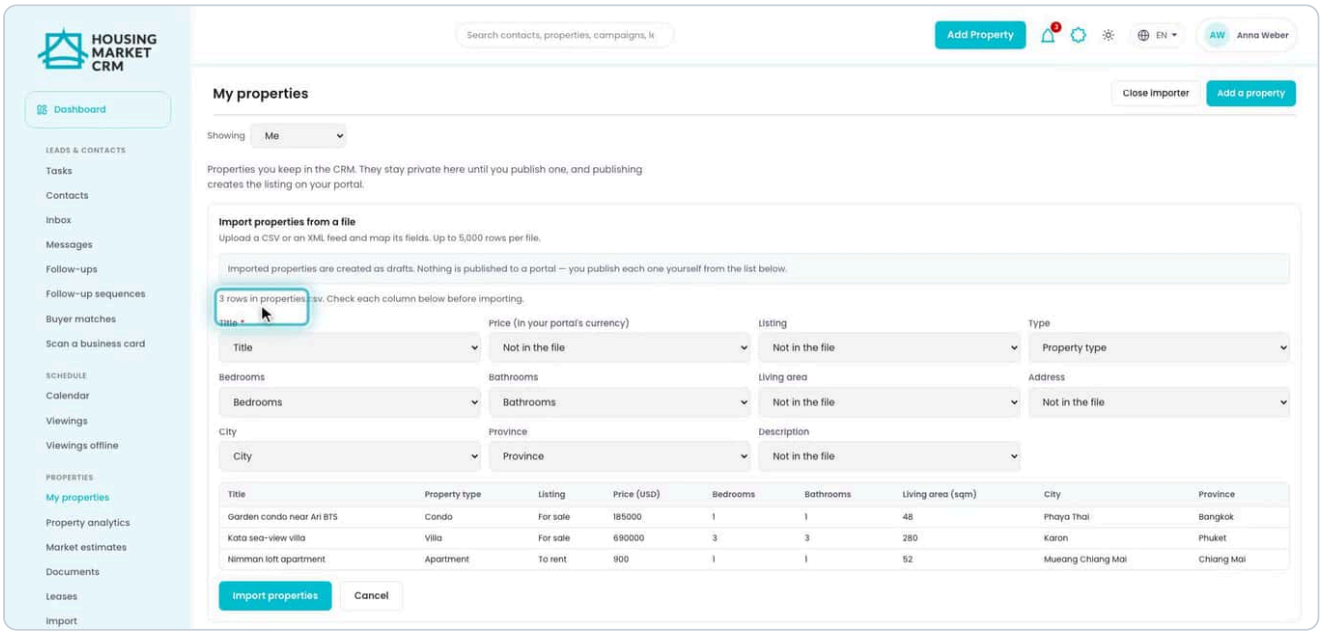


Figure 39.6 · Screen recorded 17 September 2026

7 Click **Import properties**.

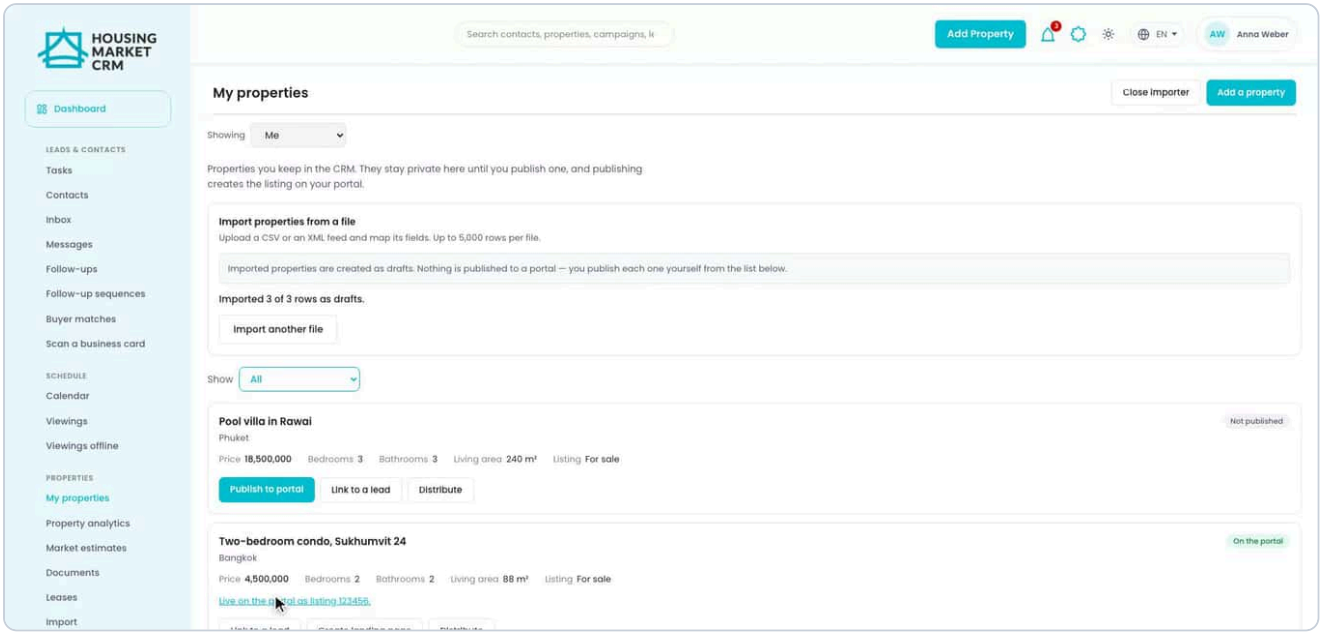


Figure 39.7 · Screen recorded 17 September 2026

8 Imported listings arrive as **drafts** — nothing is published yet.

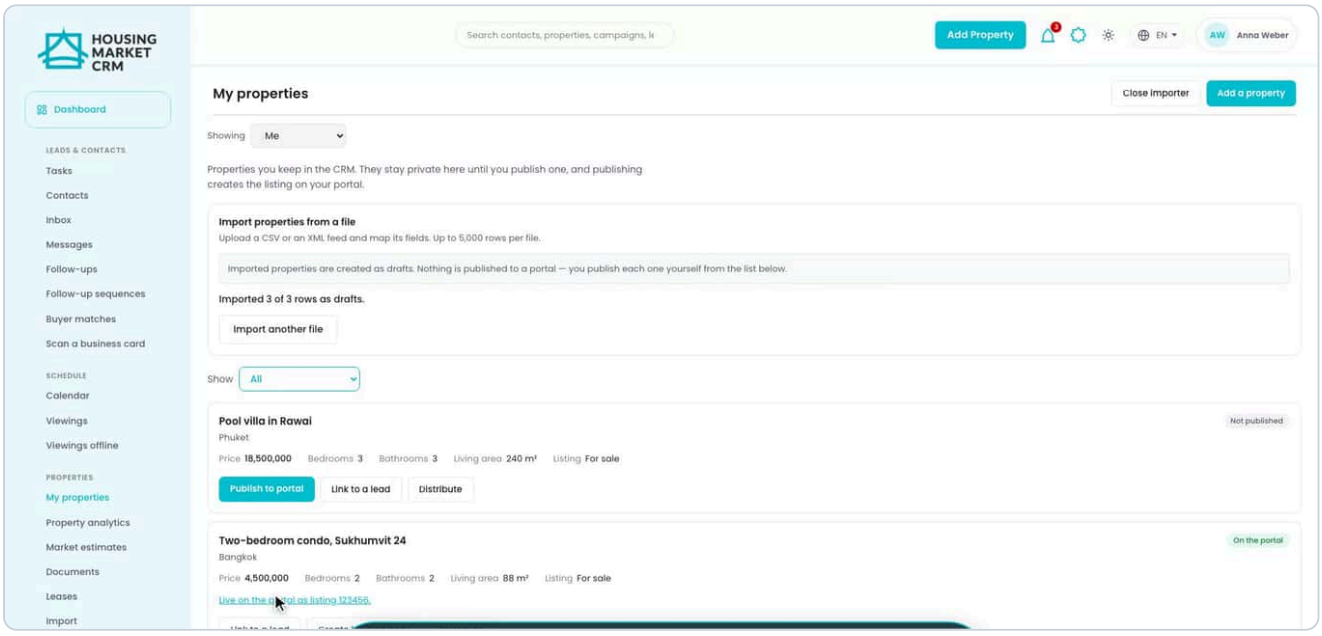


Figure 39.8 · Screen recorded 17 September 2026

9 The Importer add-on is **$29 a month** on any plan.

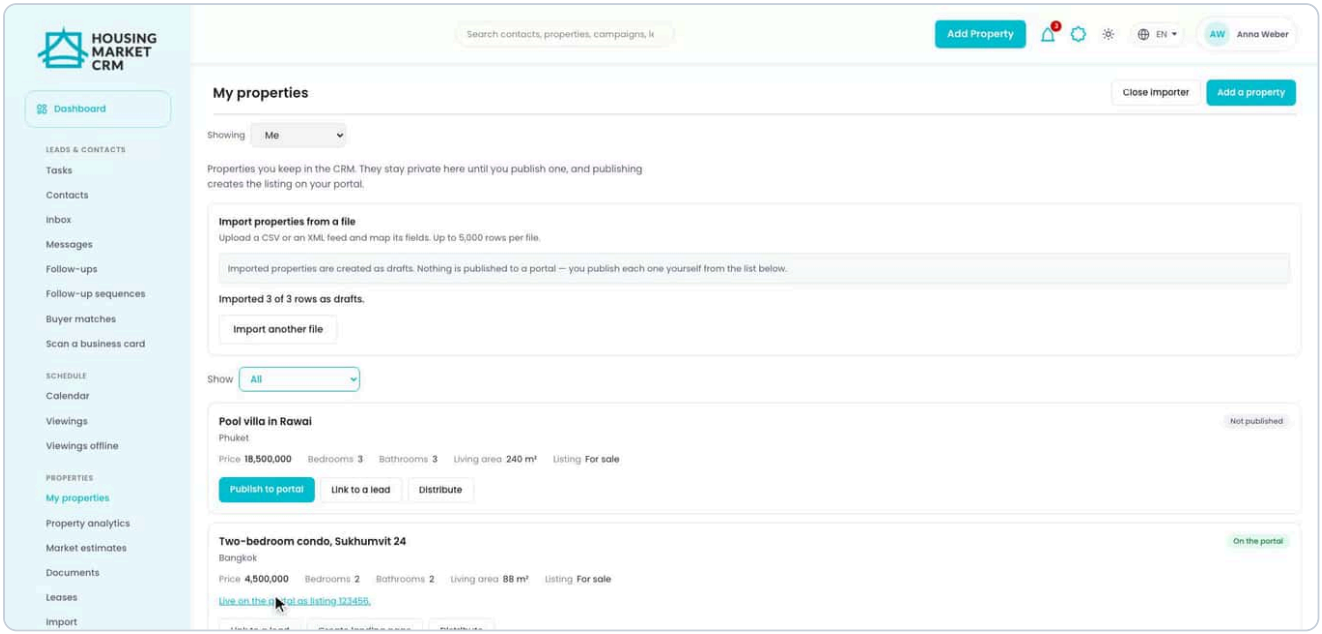


Figure 39.9 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

How do I upgrade, add users or cancel?	faq.housingmarketgroup.com/faq/how-do-i-upgrade-add-users-or-cancel

40 CHAPTER 40

The AI listing writer

Pro and Business | For agents | Watch the video

OVERVIEW

On Pro, Write with AI on the property form drafts a description from the details you have entered, in your portal's language. You read it, edit it and save it yourself.

- Open Add Property, or edit a property that is not live yet.
- Fill in the details — Type, Province and City, Price, Bedrooms, Bathrooms, Living area and whether it is for sale or to rent.
- Under Description, choose Write with AI.
- Read the draft, correct it, then choose Save as draft or Publish.

The draft is written in the main language of your portal and goes into the Description field. If the Title is empty, it suggests one too. Nothing is saved or published until you choose to: a drafted description takes exactly the same path as one you typed. It is part of Pro; on the free plan the button shows a lock.

It writes only from what you entered. A draft that mentions a number not in the property details is thrown away, and the form says so — add the detail and try again. If the form says the AI writer is not available or did not answer, nothing was generated; try again in a moment.

From the Help Center: **How does the AI listing writer work?**

STEP BY STEP

1 Open **Add property**.

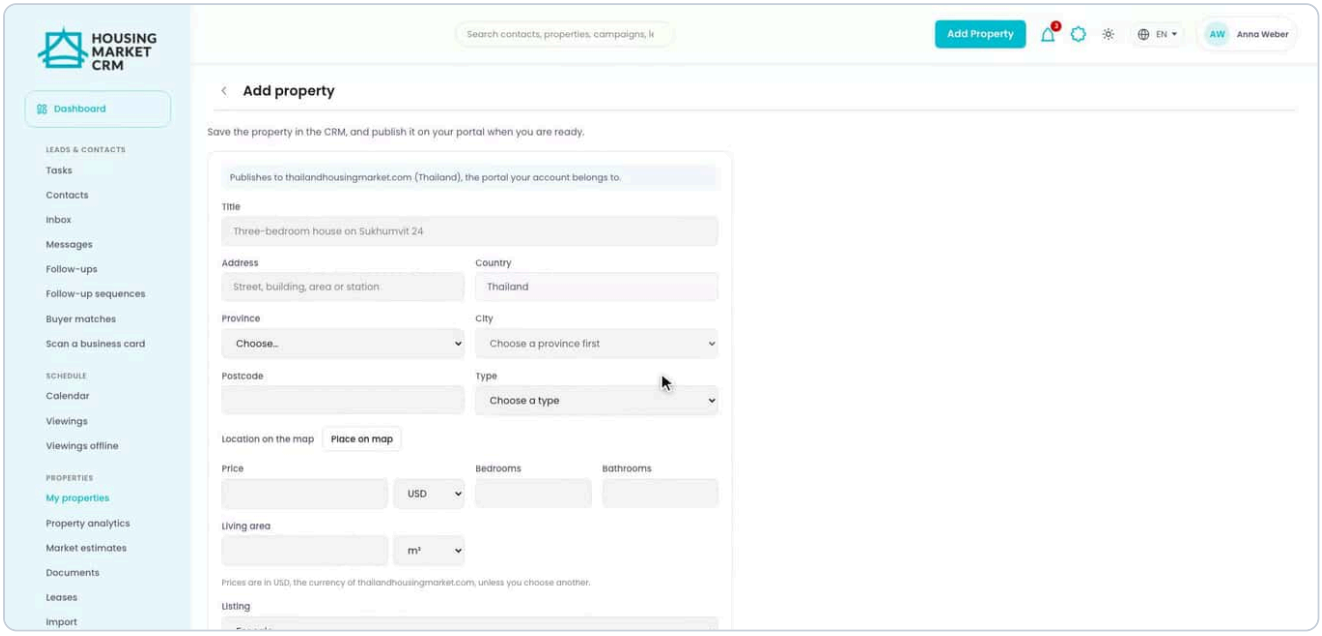


Figure 40.1 · Screen recorded 17 September 2026

2 Enter the listing **details** first.

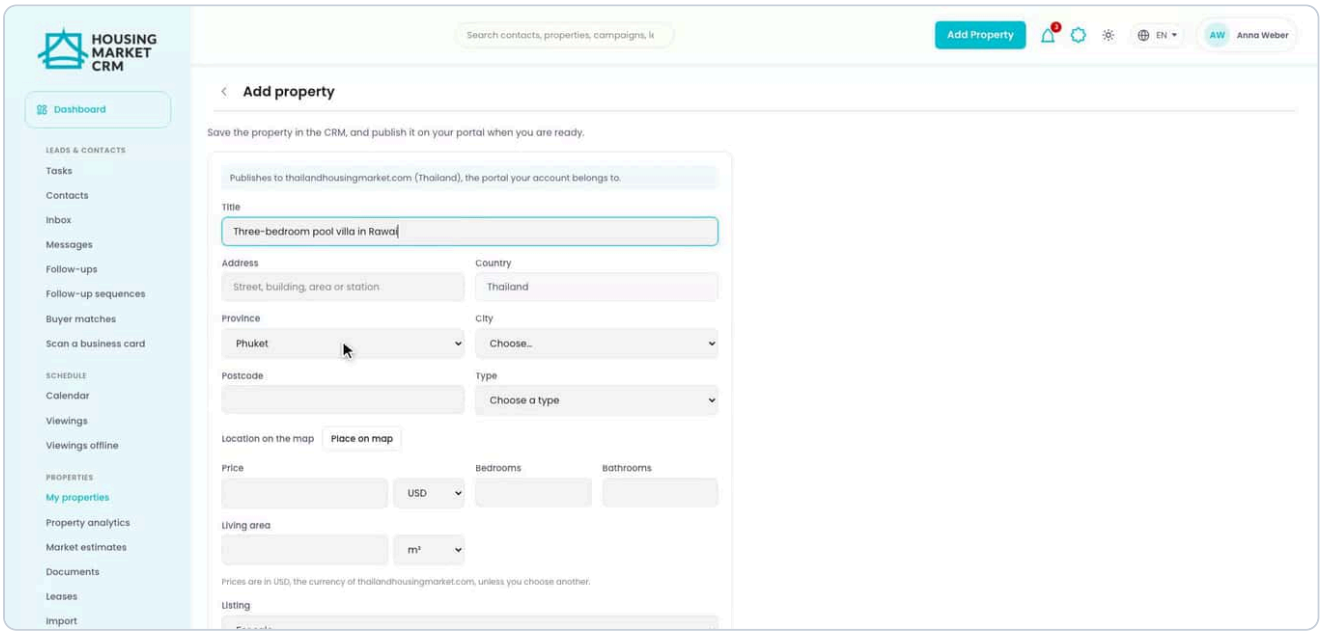


Figure 40.2 · Screen recorded 17 September 2026

3 Type, location, rooms and price all help.

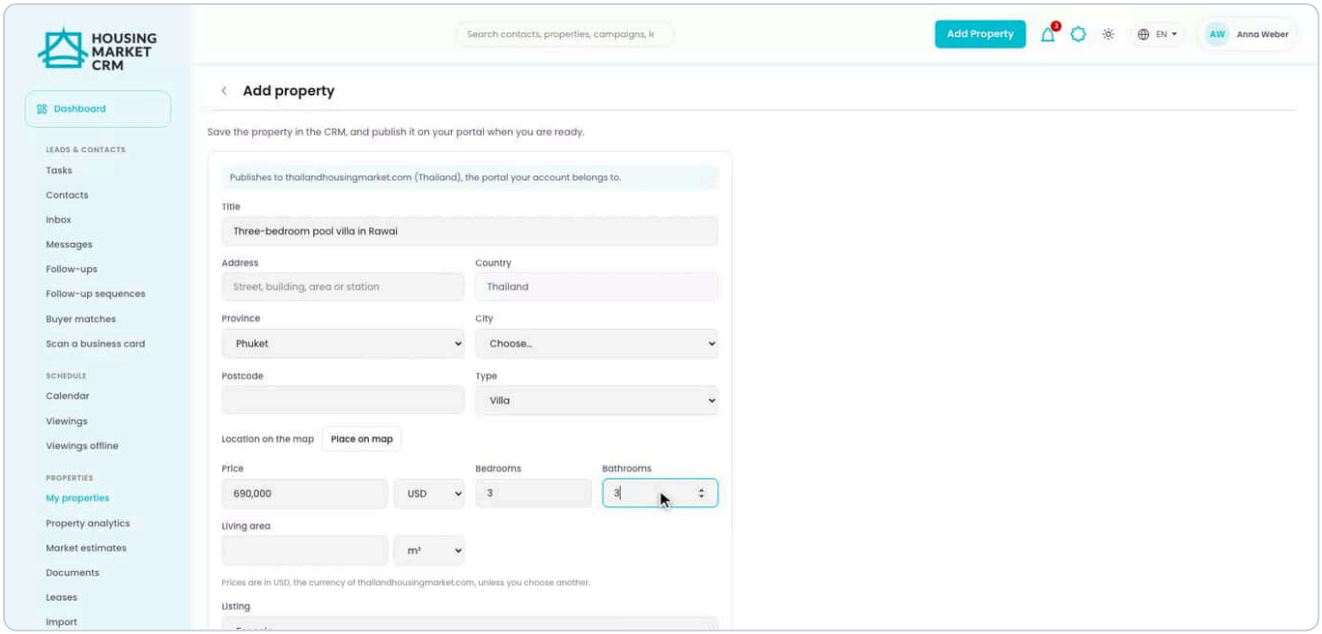


Figure 40.3 · Screen recorded 17 September 2026

4 Click **Write with AI**.

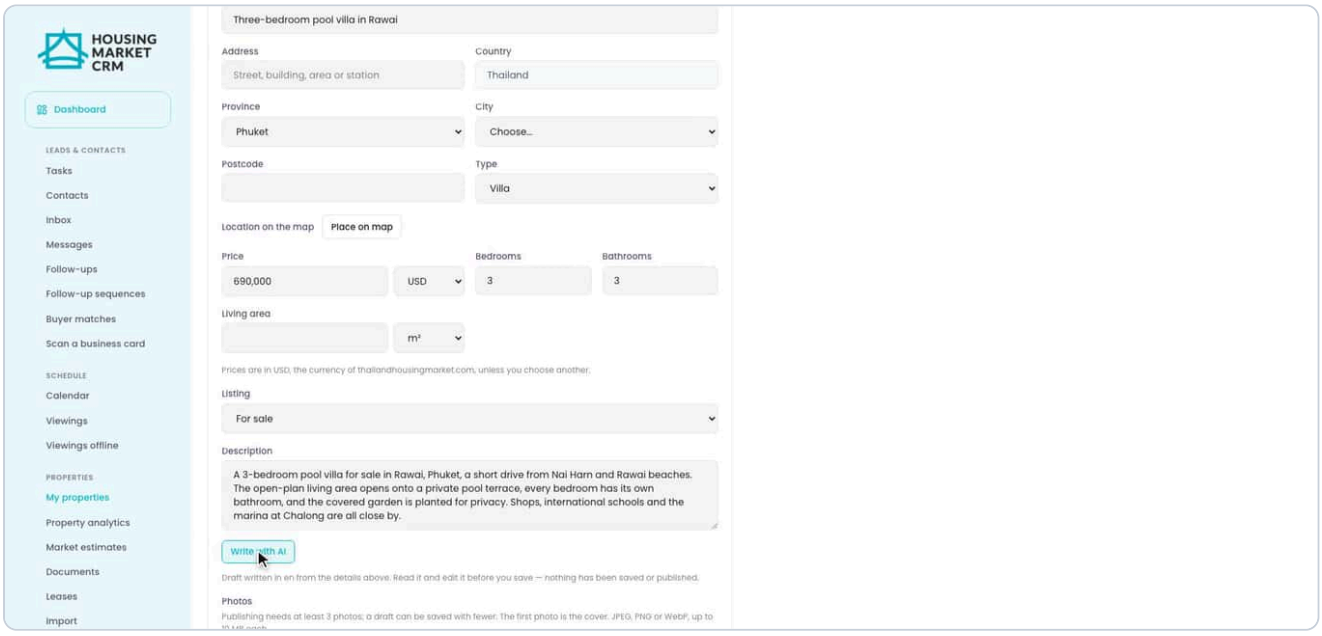


Figure 40.4 · Screen recorded 17 September 2026

5 A **draft description** appears in the field.

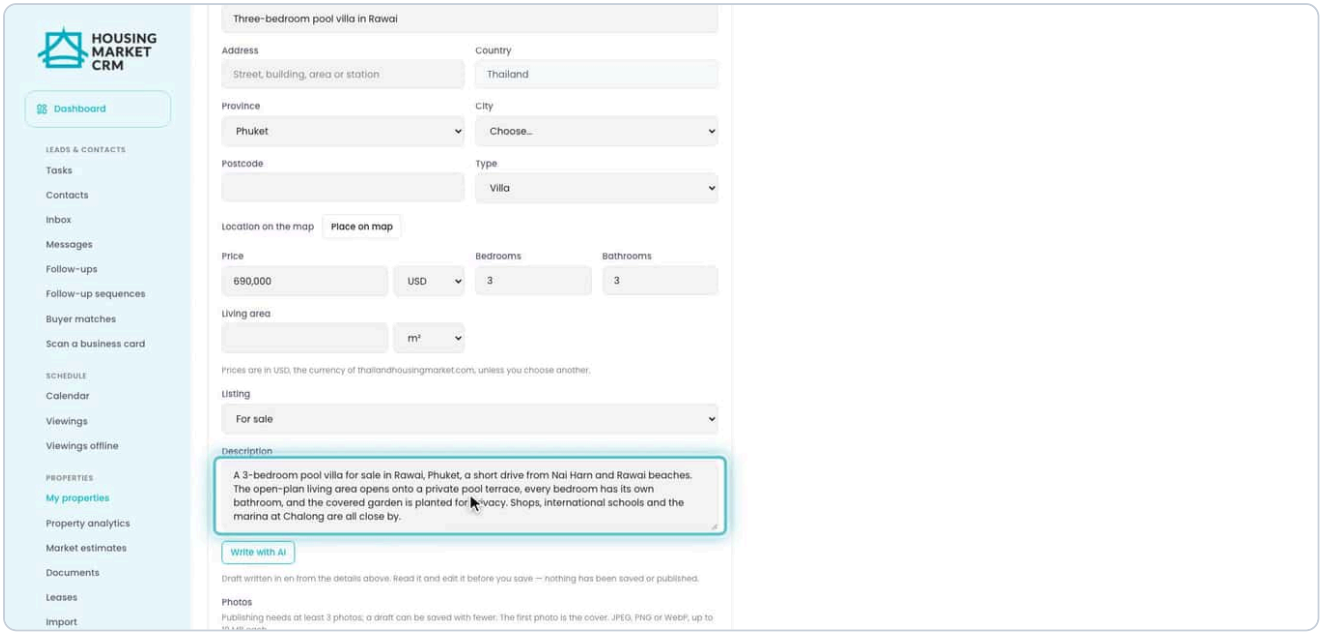


Figure 40.5 · Screen recorded 17 September 2026

6 Read it and **add your own details**.

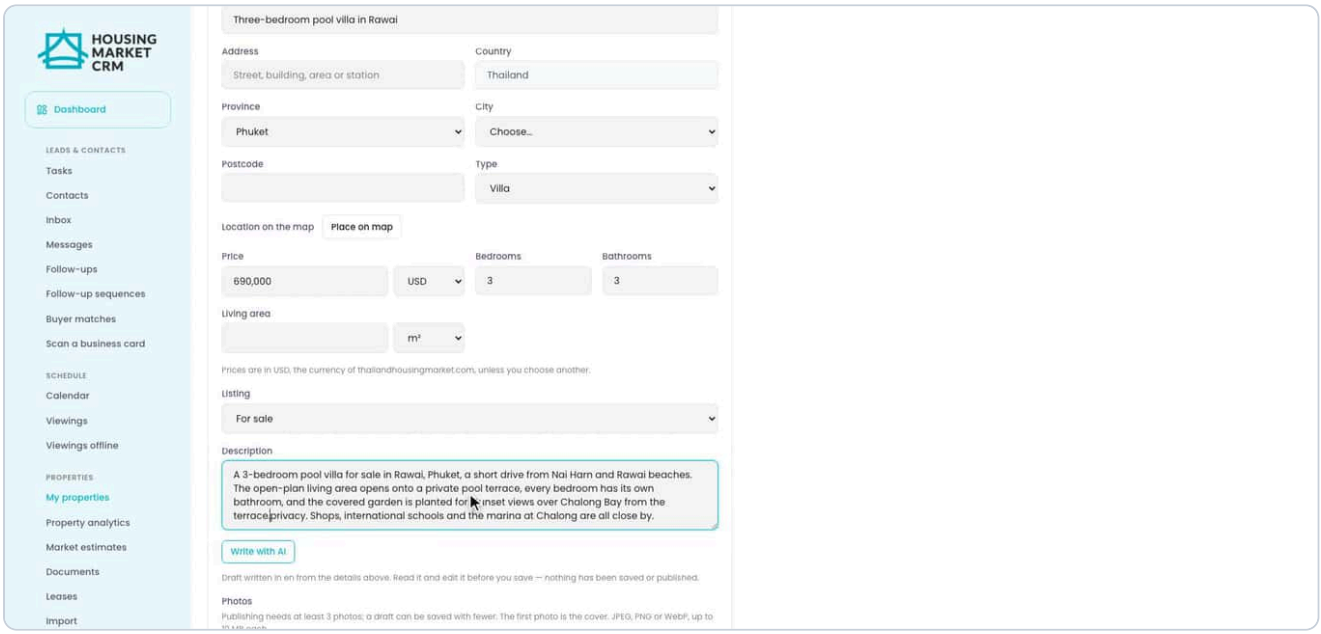


Figure 40.6 · Screen recorded 17 September 2026

7 Nothing is saved until **you** save or publish.

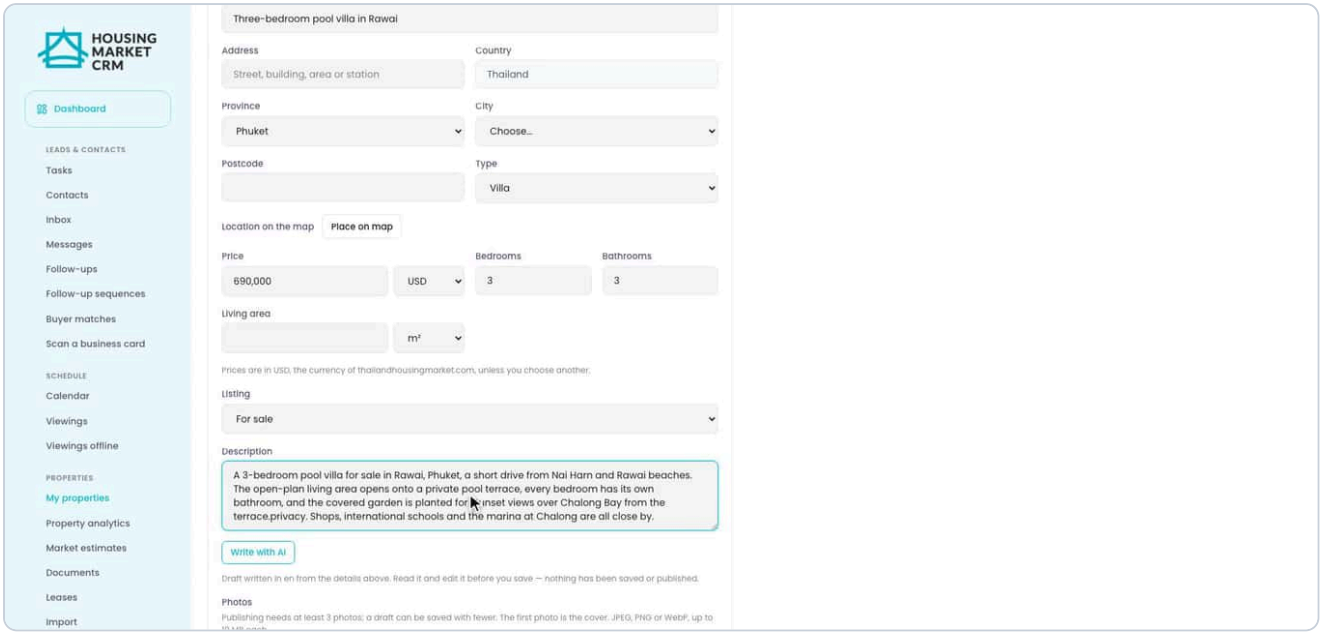


Figure 40.7 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

How do I add a property in the CRM? — faq.housingmarketgroup.com/faq/how-do-i-add-a-property

41 CHAPTER 41

Boost a listing

All plans | For agents | Watch the video

TODO The Help Center says a listing boost "cannot be bought yet"; the video (recorded 2026-10-16) shows the purchase going to the payment page. One of them is out of date — update the Help Center article if boosts are on sale.

OVERVIEW

A one-off purchase of 19 USD that puts one of your published listings above the ordinary results in that portal's property search for seven days. It is the portal's own featured-property placement, bought from inside the CRM. It needs Pro.

A boost puts one of your own listings above the ordinary results in the property search on the portal that listing is on, for seven days. It is the portal's existing featured-property placement, sold for the first time from inside the CRM instead of only from the portal.

What it is not

It is not Housing Market Ads. Ads is a separate product with campaigns, budgets and reporting, and it does not decide the order of a portal's property search at all — so a boost built as an Ads campaign would take your money and move nothing. A boost writes the portal's own featured placement and nothing else.

It is not the verified agent badge and it is not a featured agent. Those are about you; this is about one property.

How the placement works

Each portal keeps a small number of featured slots, and only three are open at a time for the kind of search a boost is placed in. If all three are taken when you buy, your boost joins the queue and the portal's own rotation brings it up — it does not push another agent's paid placement out, and a slot is never taken from somebody who already paid for it.

Only a listing that is already live on the portal can be boosted, so publish it first. A listing that is already featured, or already waiting for a slot, cannot be boosted until that has finished, and one listing carries one boost at a time.

A boost runs for seven days and comes down by itself. There is nothing to cancel: the placement ends on its own and the charge is never reversed part-way through.

What it costs

It is a fixed one-off charge of 19 USD for those seven days, never a commission, never a share of what the property sells for, and never a subscription. It is charged in USD, as everything in Housing Market Group is. The Listing boost page shows the price before you pay, and that is the amount the payment page charges.

A boost needs Pro. It is a paid extra on top of a paid plan: holding Pro does not include one, and buying one does not give you Pro.

Buying one

- Choose Listing boost in the left menu. Your listings that are live on the portal are listed there.
- Choose Boost this listing beside the one you want. You go to a secure payment page; if you leave it without paying, nothing is charged.
- Once the payment has gone through, the listing shows Active and the date the boost ends — or, if all three featured slots are taken, that it is waiting for a free featured slot on the portal.
- Boosts you have bought lists every boost with its dates, so you can see when each one ran.

If the page says that boosts are not on sale at the moment, none can be bought right then. Nothing is wrong with your listings and nothing has been charged.

From the Help Center: **What is a listing boost?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

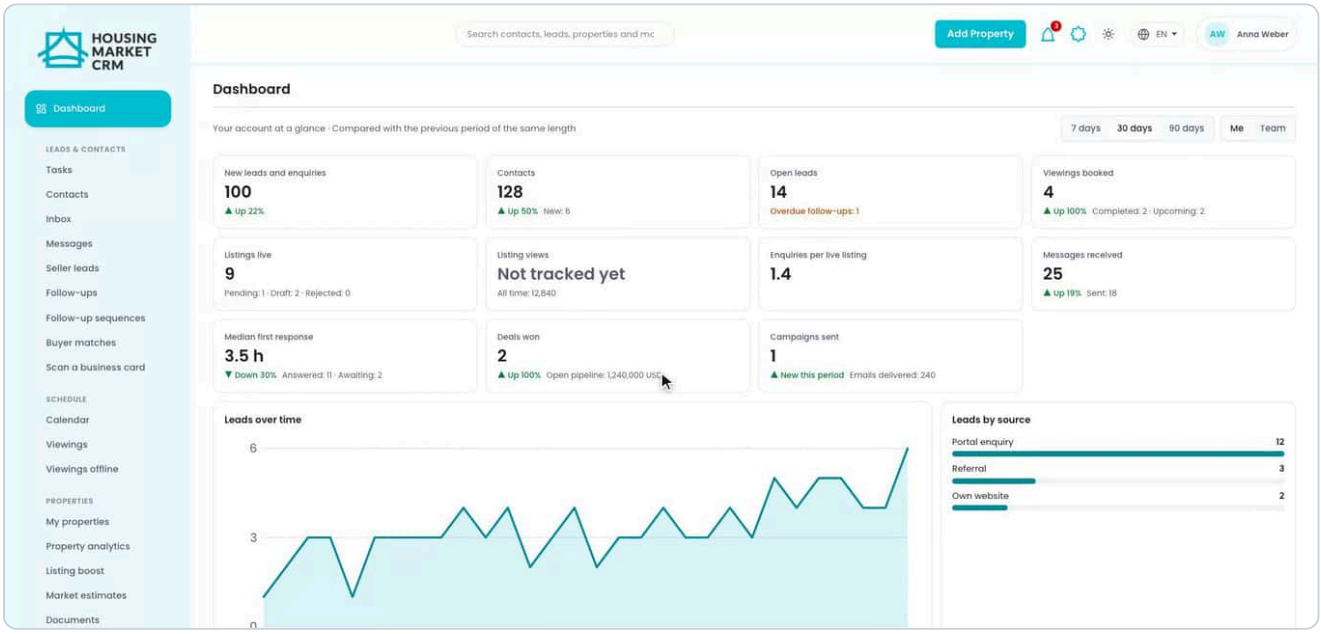


Figure 41.1 · Screen recorded 16 October 2026

2 Click **Listing boost** in the left menu.

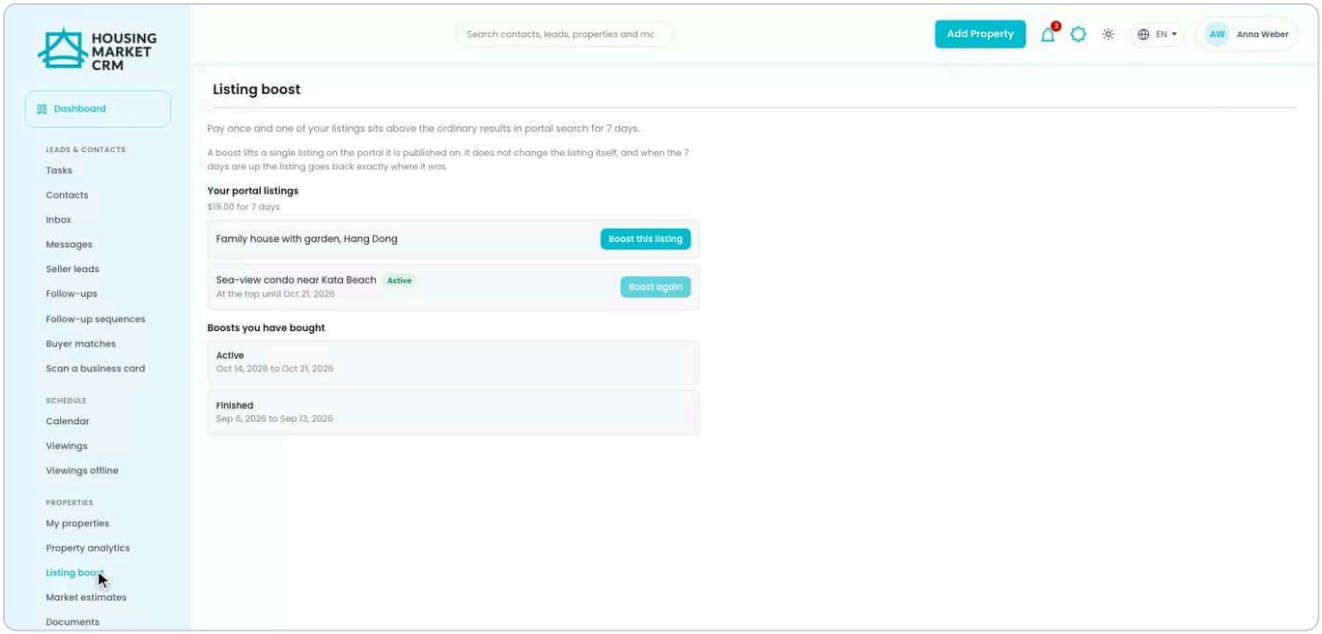


Figure 41.2 · Screen recorded 16 October 2026

3 One listing sits **above the ordinary results** in portal search.

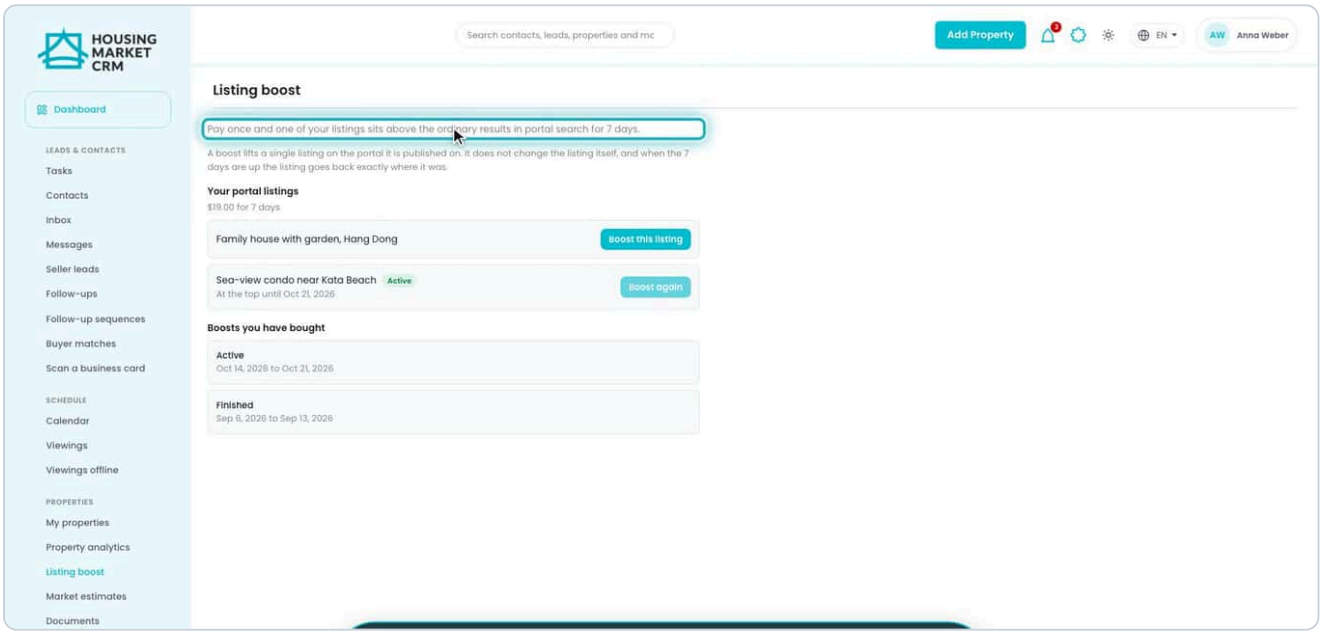


Figure 41.3 · Screen recorded 16 October 2026

4 After 7 days it goes back exactly where it was.

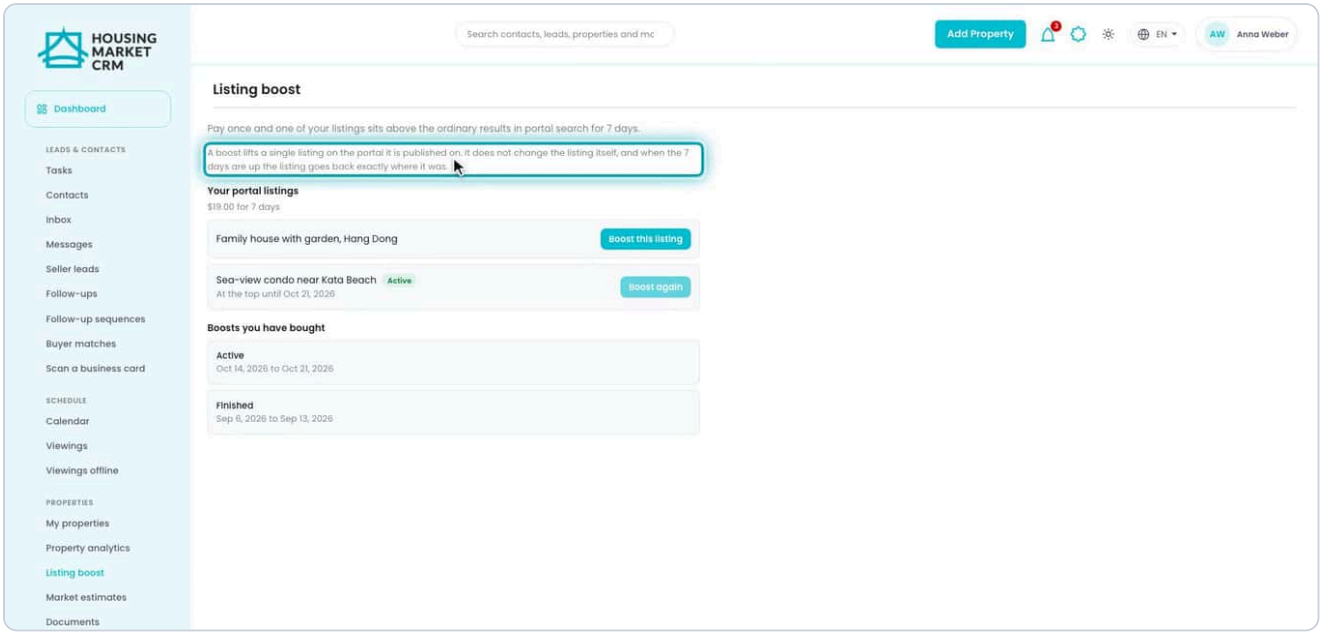


Figure 41.4 · Screen recorded 16 October 2026

5 $19 for seven days, paid once. No subscription.

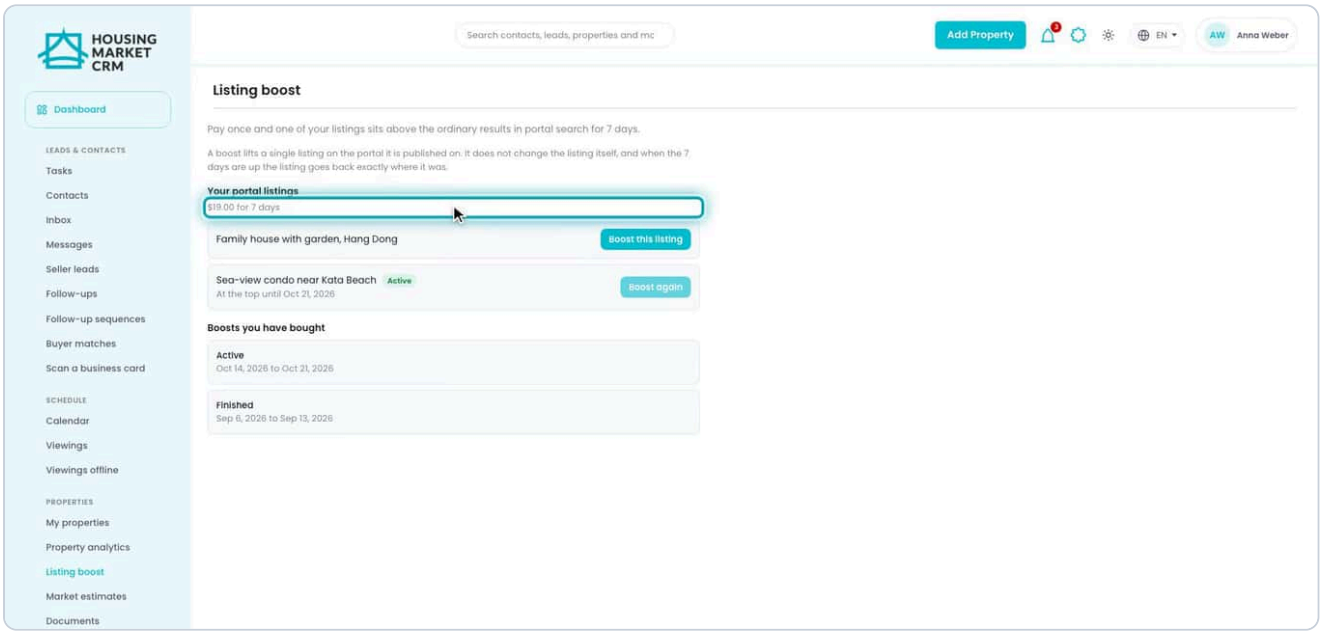


Figure 41.5 · Screen recorded 16 October 2026

6 Your **portal listings** are listed here.

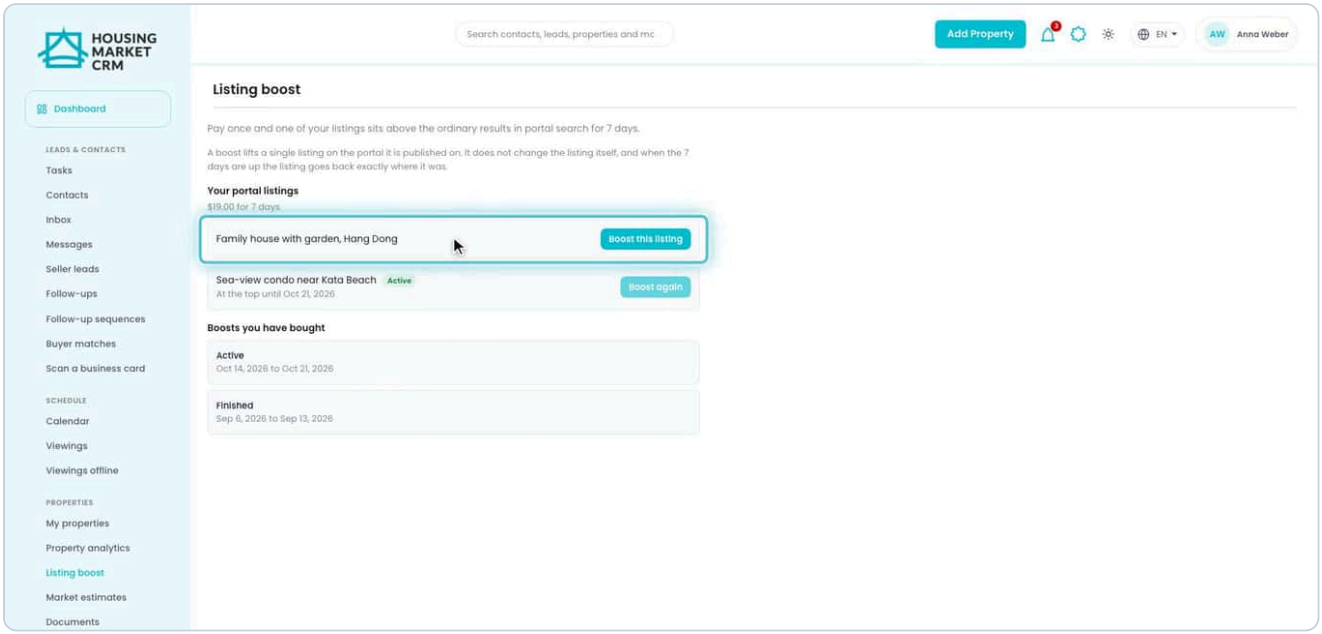


Figure 41.6 · Screen recorded 16 October 2026

7 Click **Boost this listing** to go to Stripe's **secure payment page**.

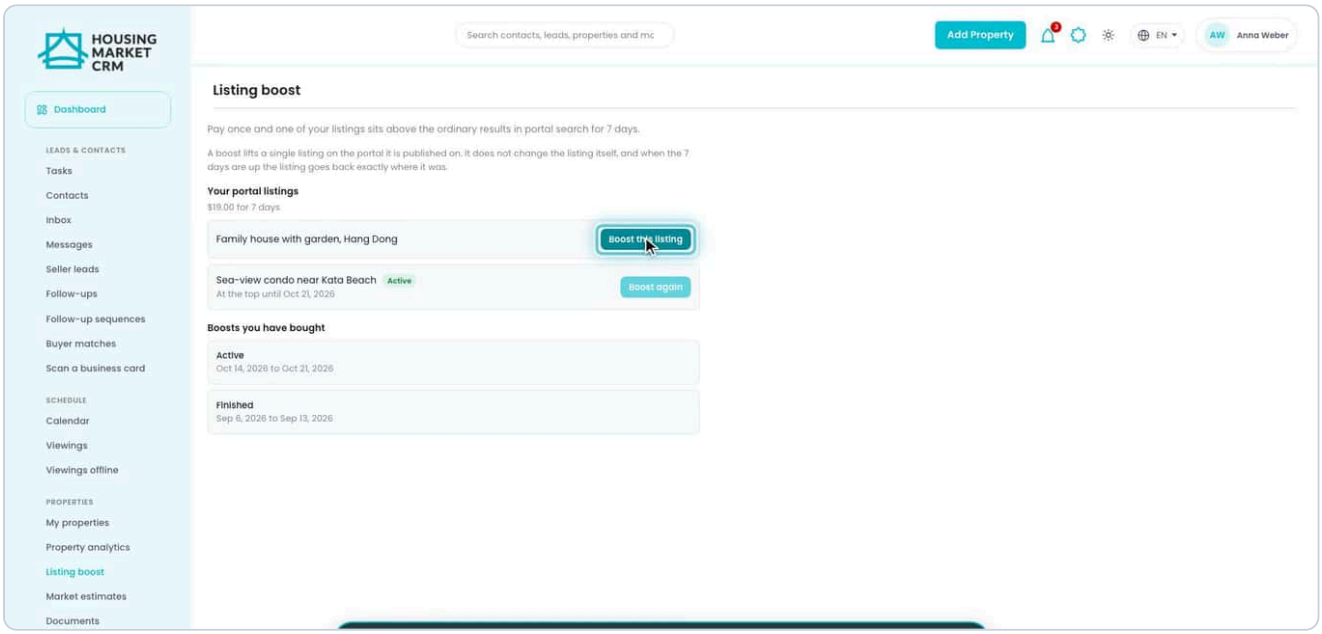


Figure 41.7 · Screen recorded 16 October 2026

8 If you leave the payment page, **nothing is charged**.

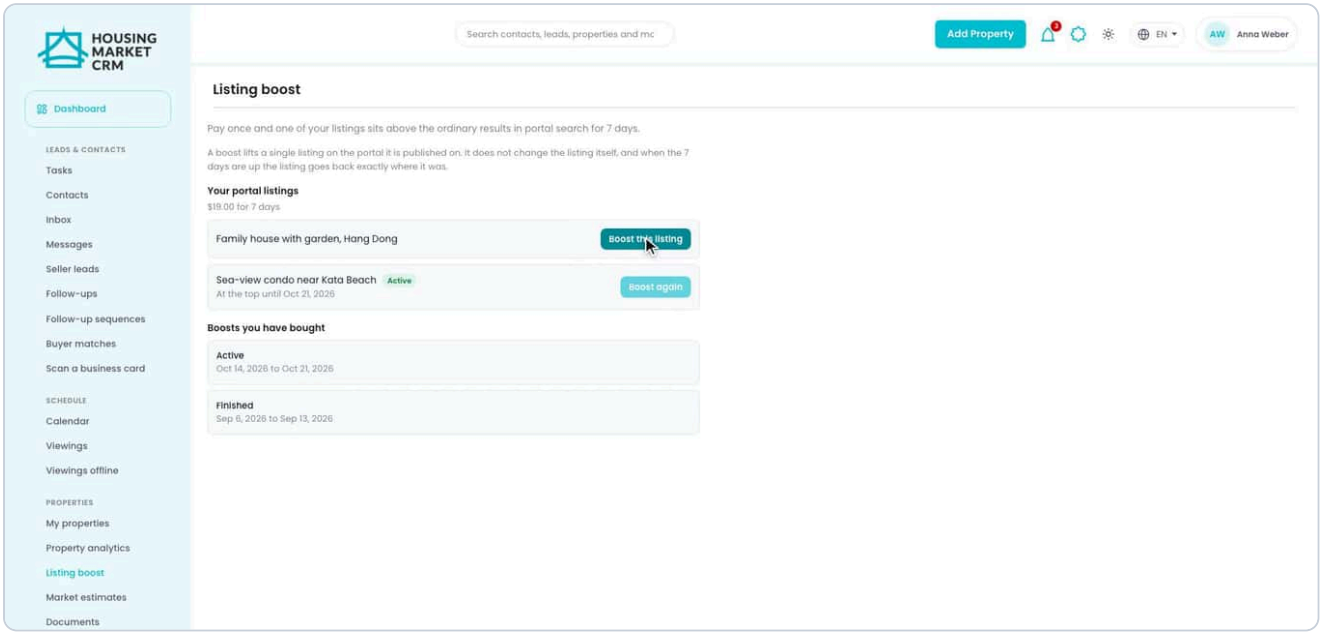


Figure 41.8 · Screen recorded 16 October 2026

9 A boosted listing shows **Active** and the day it **ends**.

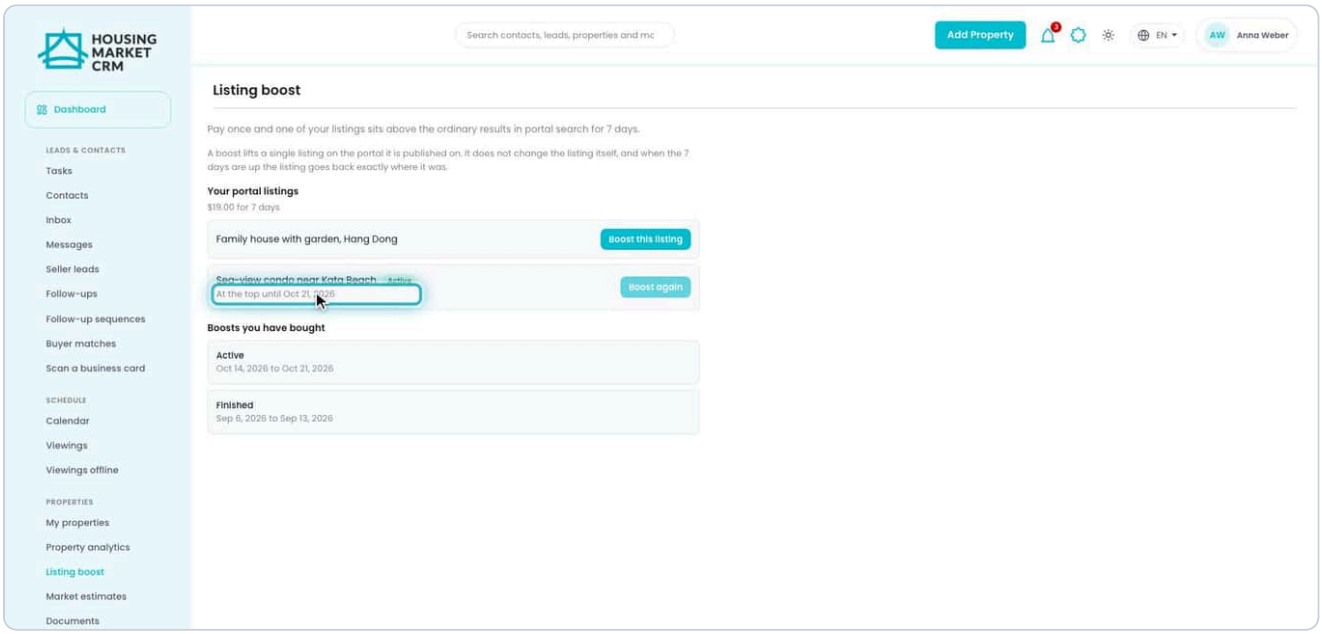


Figure 41.9 · Screen recorded 16 October 2026

10 Every boost you have bought, with its **dates**.

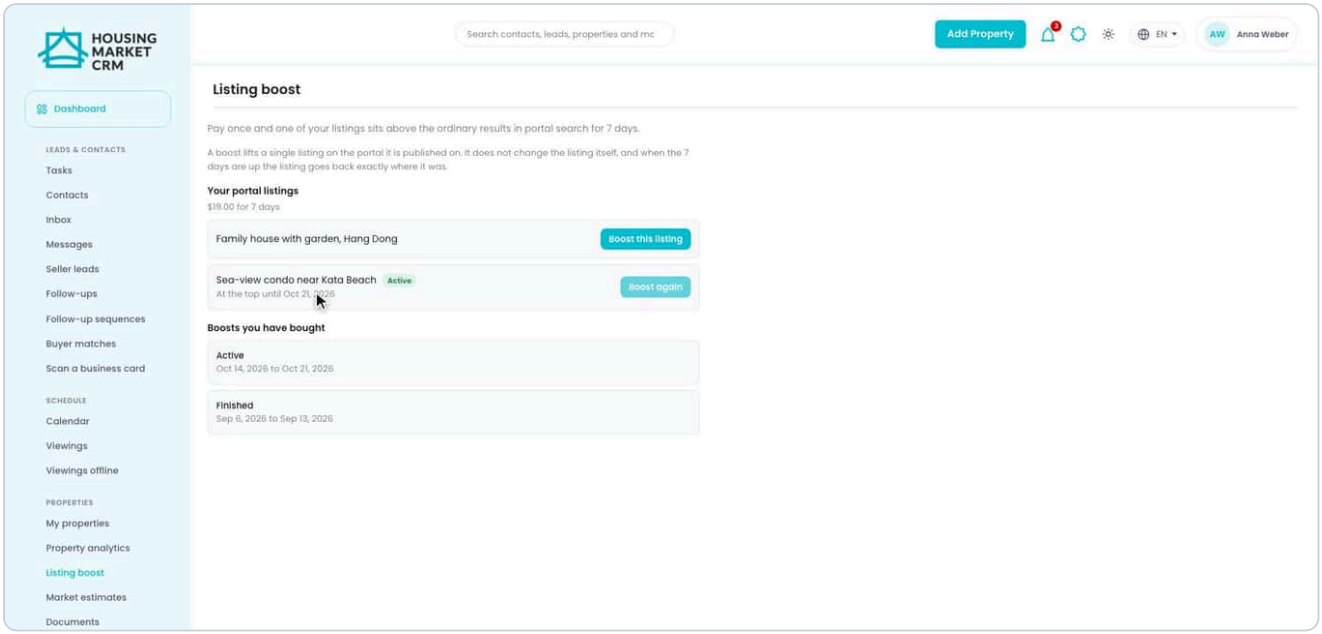


Figure 41.10 · Screen recorded 16 October 2026

42 CHAPTER 42

Market estimate reports

Business | For agents | Watch the video

OVERVIEW

On Business, describe a property and the CRM gives you a market estimate range from comparable listings on your portal, which you can export as a branded PDF for an owner.

Open Market estimates and describe the property: address, sale or rent, property type, area, bedrooms, bathrooms and floor area. The CRM compares it with similar listings on the portal for your market and returns an estimate range, with the comparable listings it was built from. It is part of Business.

Only listings in the same currency are compared, and nothing is converted. The more of the form you fill in, the closer the comparables are.

Export the result as a PDF branded in your name to hand to an owner. Each report is saved as it was calculated, so the figures an owner was shown do not change later as the market moves.

It is a market estimate drawn from asking prices on the portal, and it says so on the report. It is not a formal assessment of a property's value by a licensed professional, and should not be presented to an owner, a lender or a court as one.

From the Help Center: **What is a market estimate report?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

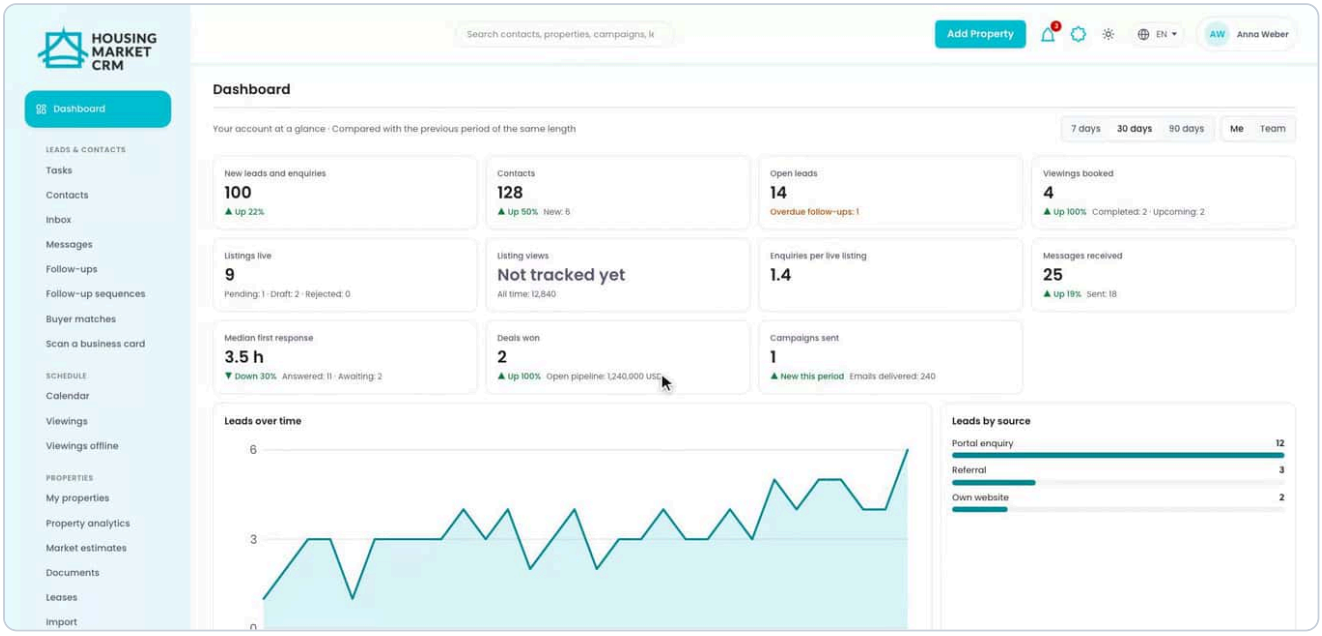


Figure 42.1 · Screen recorded 24 September 2026

2 Click **Market estimates** in the left menu.

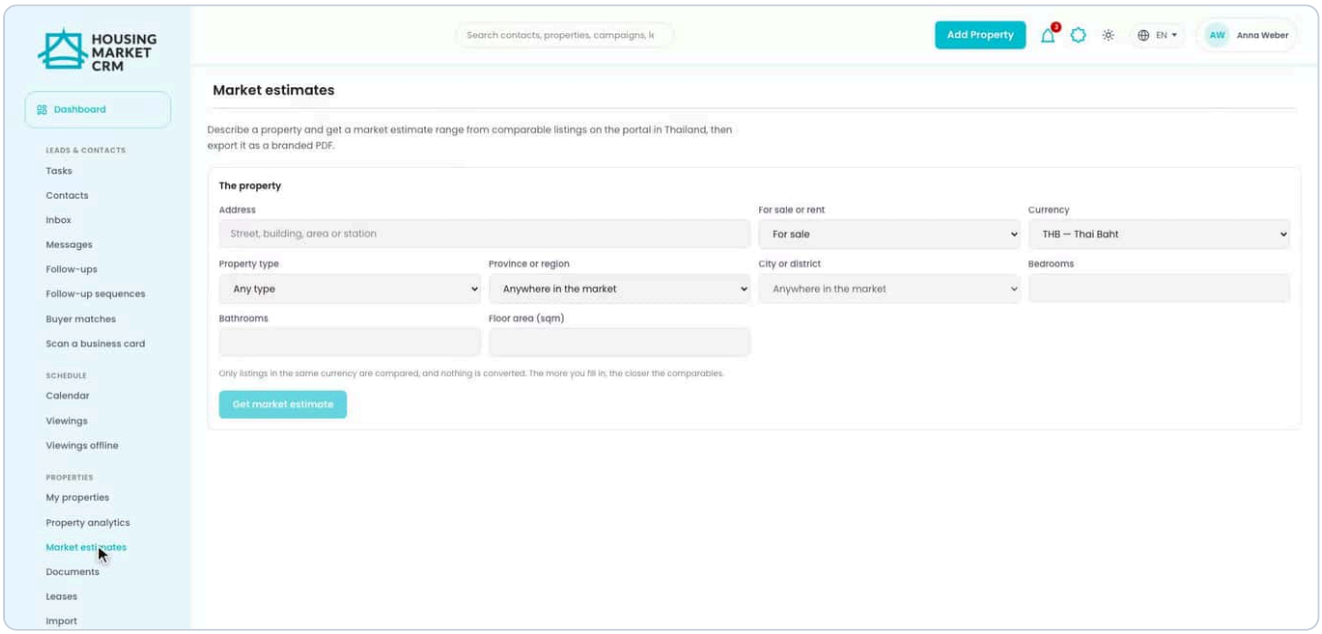


Figure 42.2 · Screen recorded 24 September 2026

3 Enter the **address**.

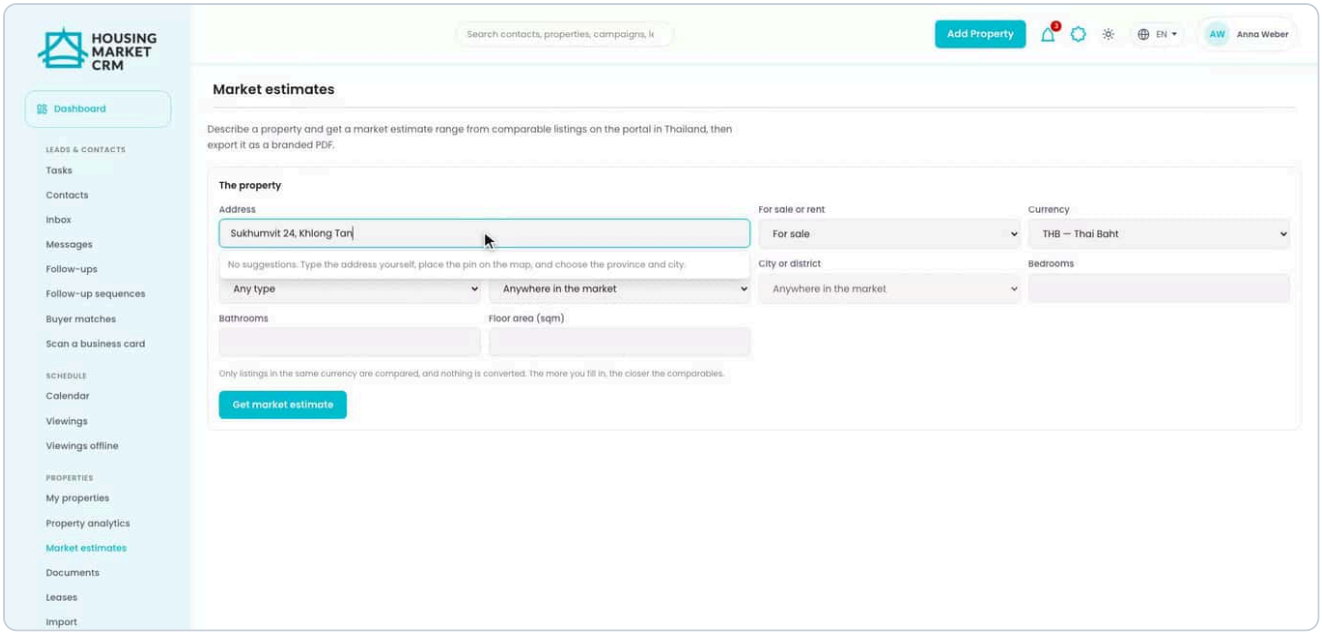


Figure 42.3 · Screen recorded 24 September 2026

4 Choose **For sale** or **For rent**.

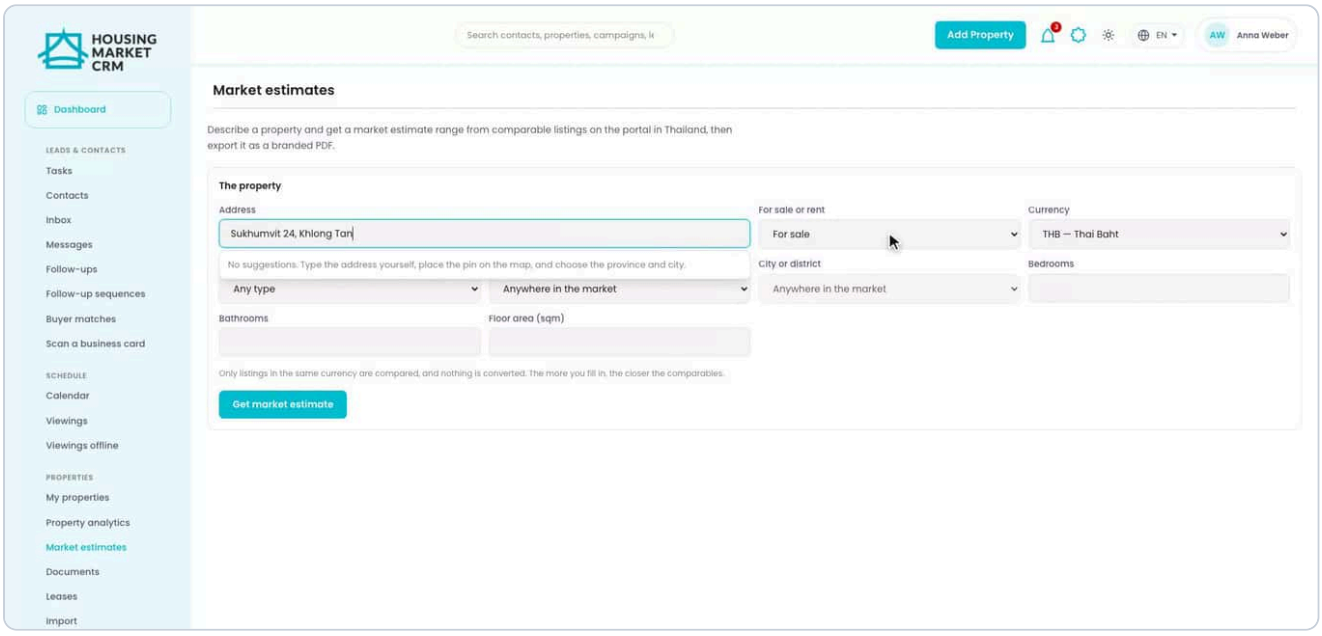


Figure 42.4 · Screen recorded 24 September 2026

5 Pick the **currency**.

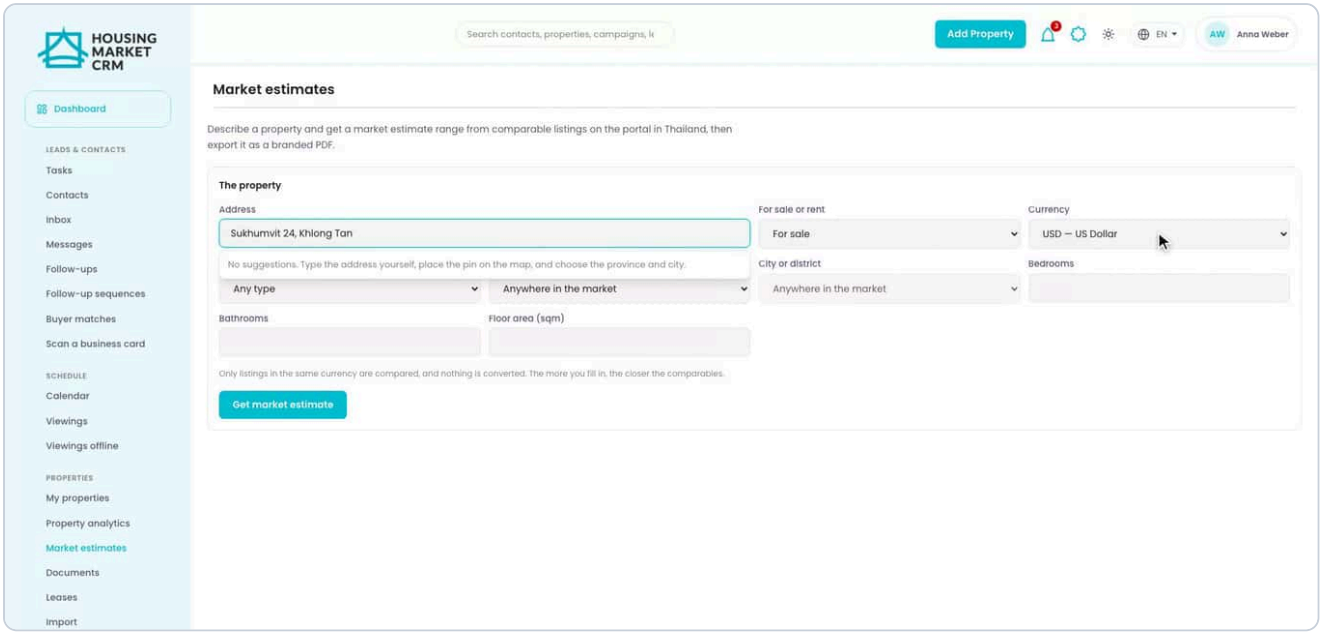


Figure 42.5 · Screen recorded 24 September 2026

6 Choose the **property type** and the **area**.

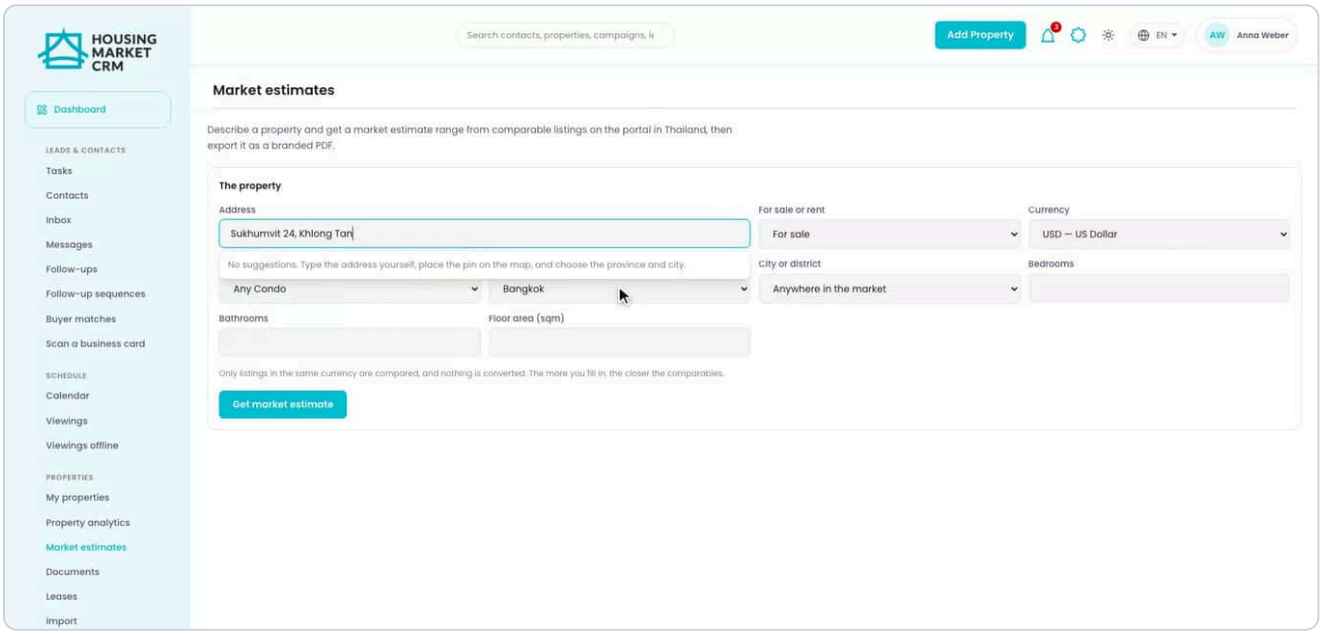


Figure 42.6 · Screen recorded 24 September 2026

7 Add **bedrooms**, bathrooms and **floor area**.

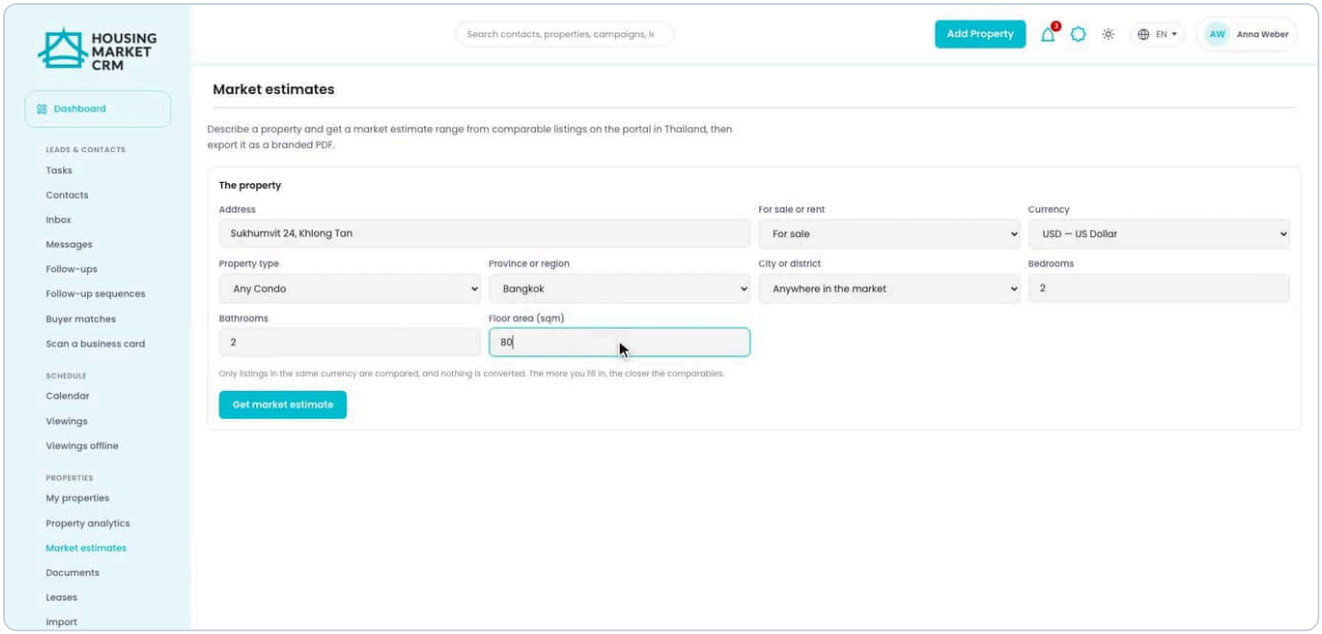


Figure 42.7 · Screen recorded 24 September 2026

8 Click **Get market estimate**.

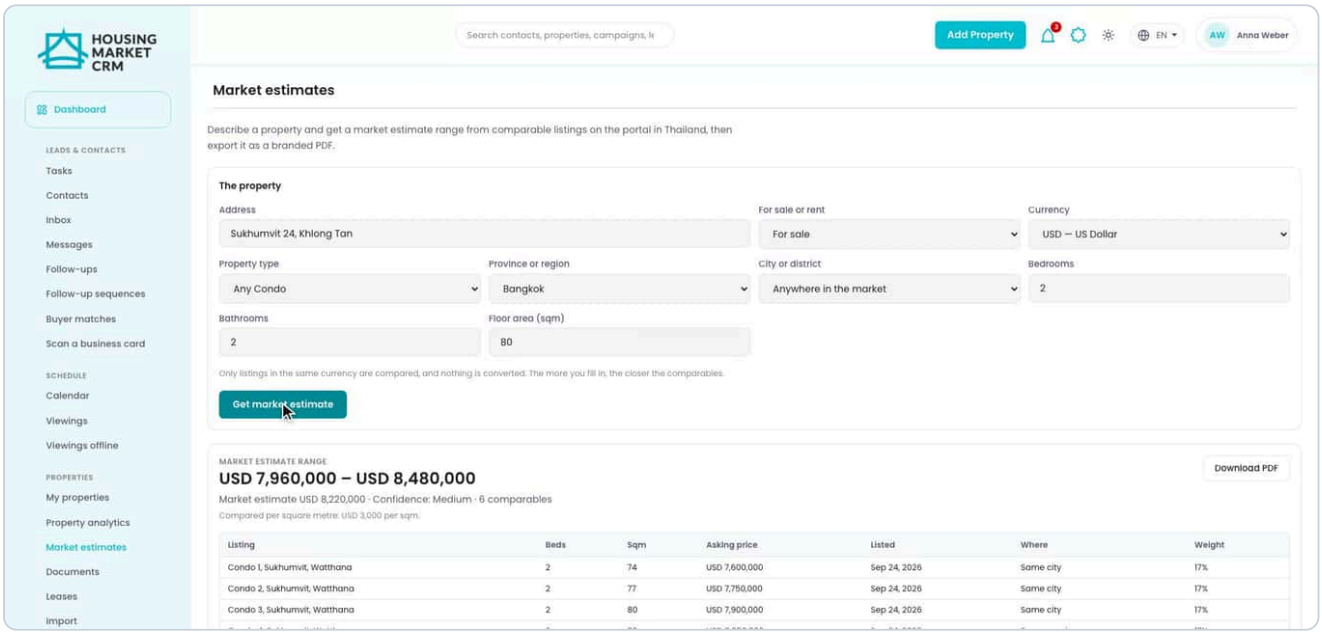


Figure 42.8 · Screen recorded 24 September 2026

9 Use the estimate as a starting point for your **owner meeting**.

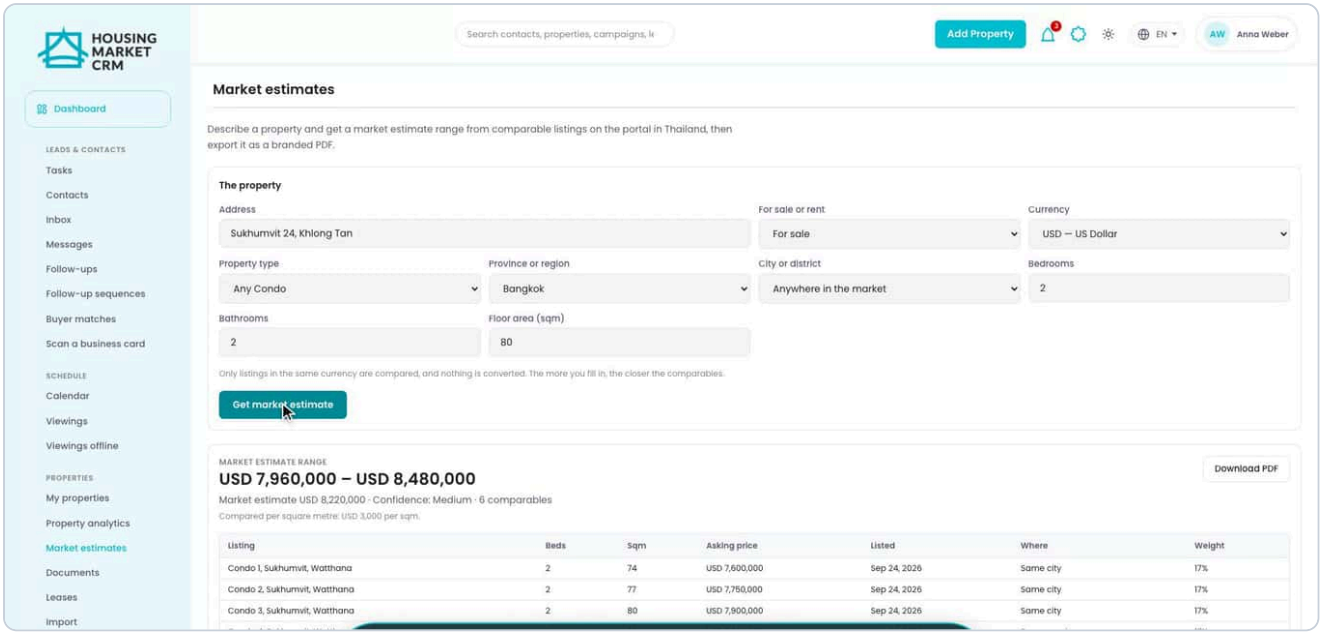


Figure 42.9 · Screen recorded 24 September 2026

RELATED HELP CENTER ARTICLES

What are seller leads, and what does one cost?	faq.housingmarketgroup.com/faq/what-are-seller-leads-and-what-does-one-cost

43 CHAPTER 43

Add a property abroad

All plans | For agents | Watch the video

OVERVIEW

Yes. Choose Country when you add the property. A property outside your portal's country is saved in your CRM as a draft that you can link to leads; only properties in your portal's own country can be published.

Open My properties, choose Add a property and give the property a title. In Country, choose where the property is. If it is outside your portal's country, the CRM tells you it will be saved as a draft.

Search for the address: the search works worldwide. Choose the right suggestion and the address, postcode and map pin are filled in for you. Check the city and province, and type them yourself if they are empty. Then choose the type and the price. Enter the price and choose the currency it is in; it starts as your portal's currency and is never converted.

Choose Save as draft. The property is now in your CRM, ready to link to leads and to show to the buyers you work with.

Only properties in your own portal's country can be published to the portal. A property abroad stays a draft in your CRM. To see how to link it to a lead, read "How do I link a lead to a property?".

From the Help Center: **Can I save a property in another country in the CRM?**

STEP BY STEP

1 Open **My properties** in Housing Market CRM.

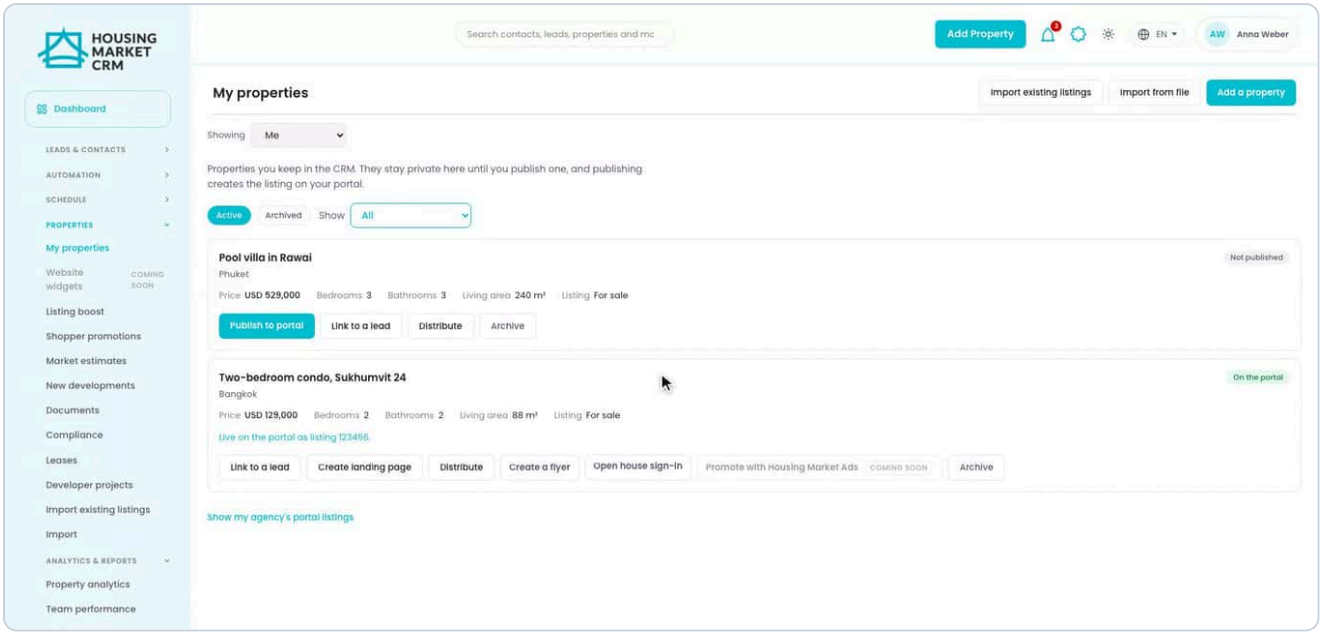


Figure 43.1 · Screen recorded 28 October 2026

2 Click **Add a property**.

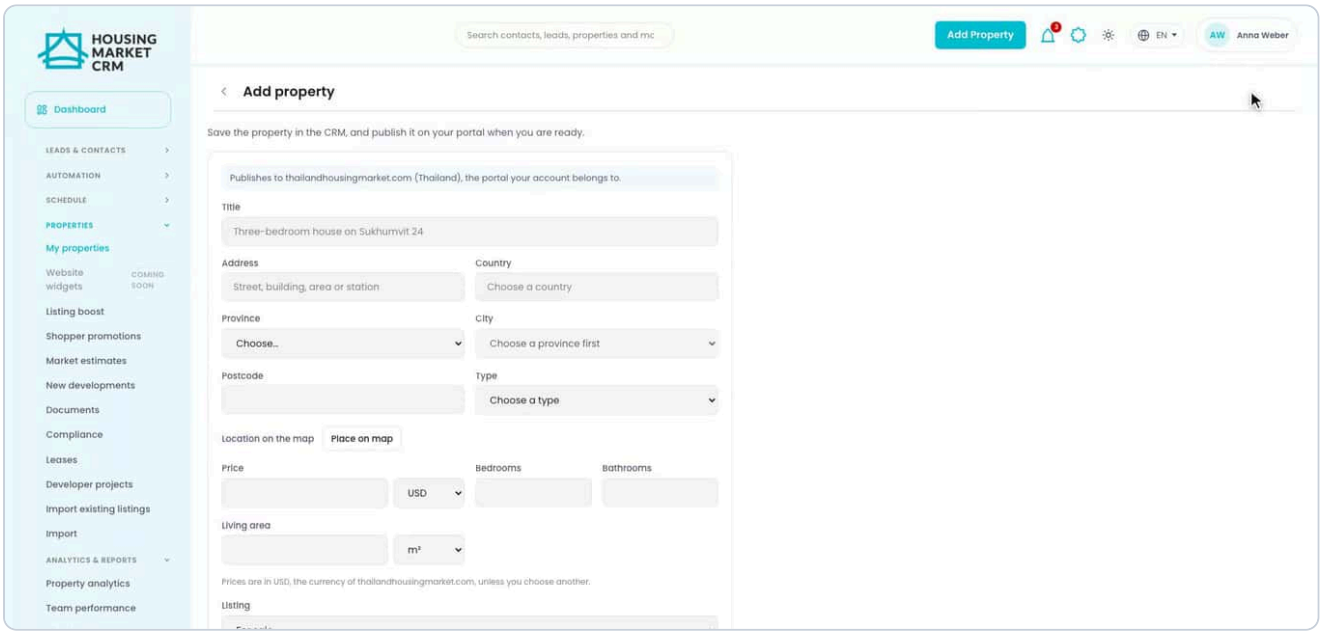


Figure 43.2 · Screen recorded 28 October 2026

3 Give the property a **title**.

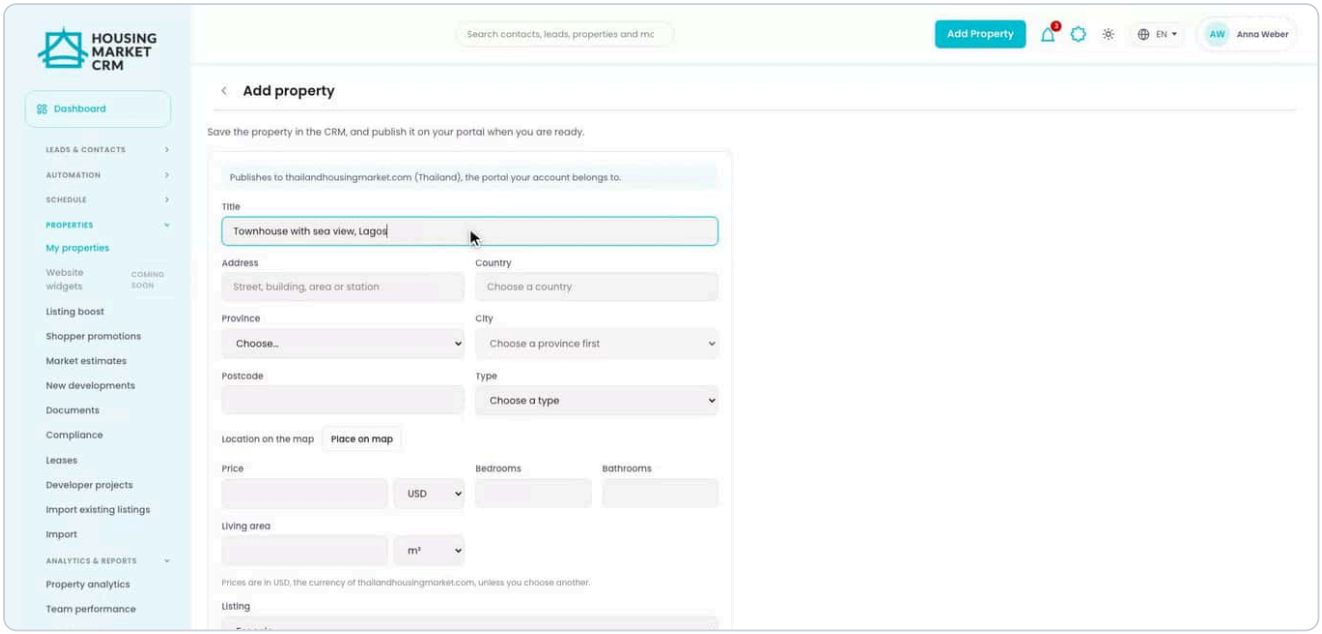


Figure 43.3 · Screen recorded 28 October 2026

4 In **Country**, choose where the property is, here **Portugal**.

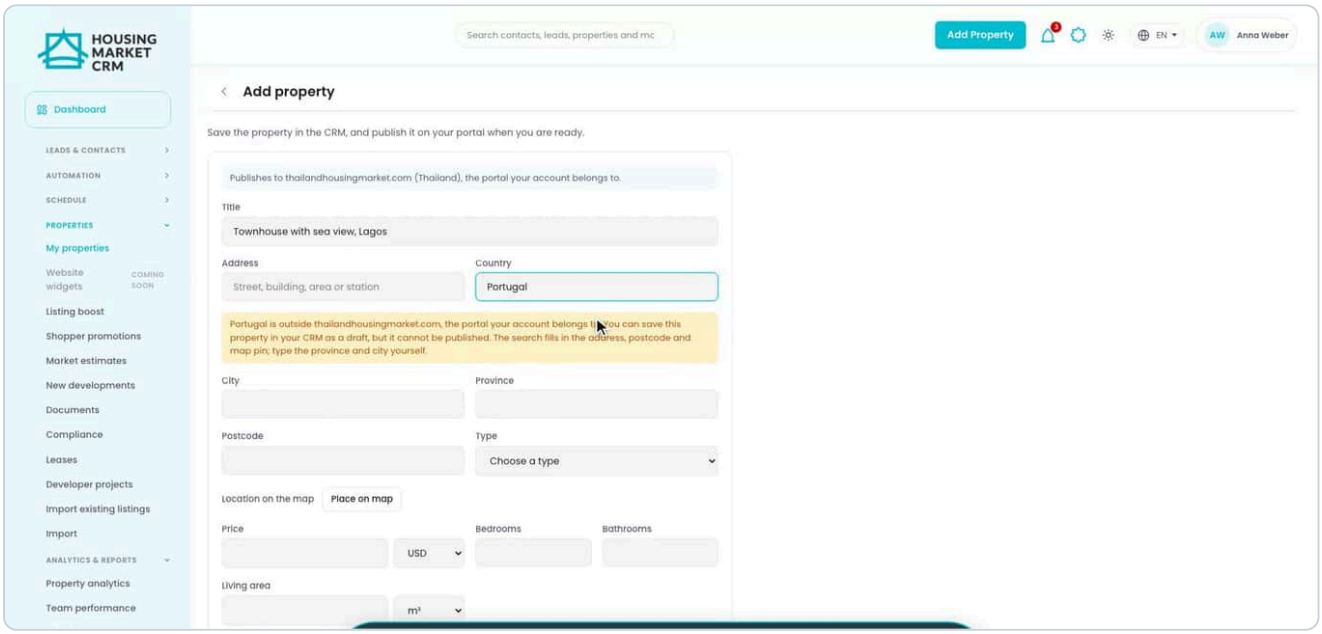


Figure 43.4 · Screen recorded 28 October 2026

5 Outside your portal's country, the property is **saved in your CRM as a draft**.

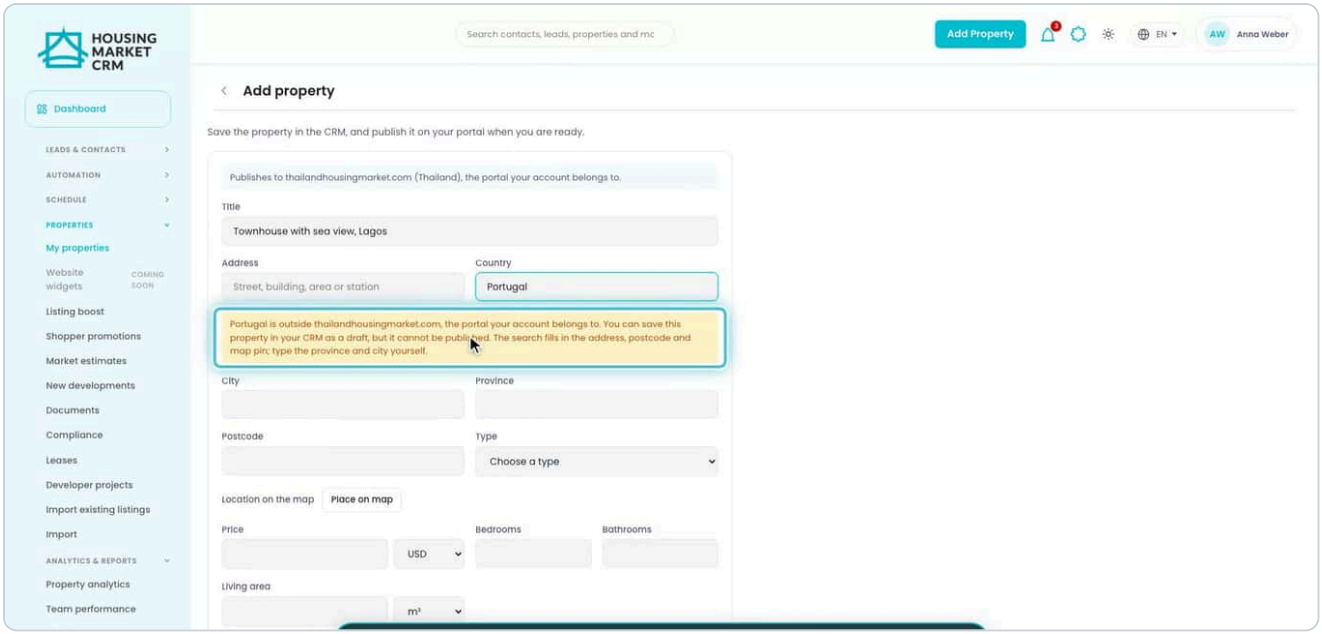


Figure 43.5 · Screen recorded 28 October 2026

6 Search the **address**: the search works worldwide.

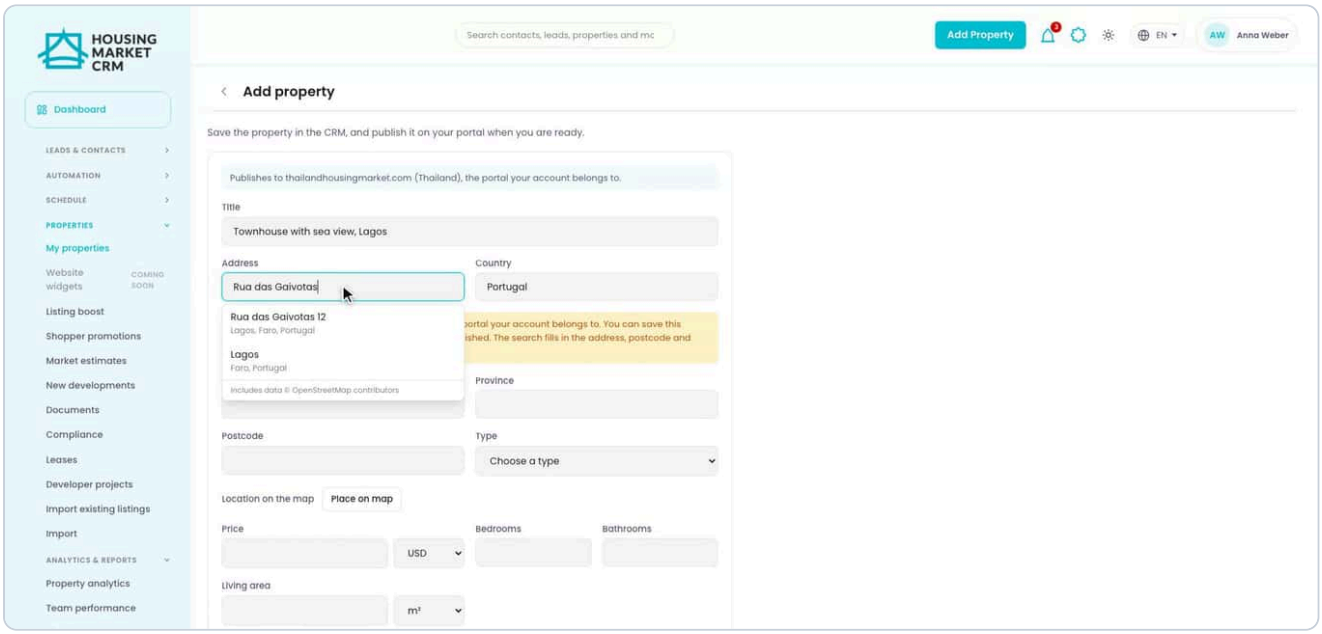


Figure 43.6 · Screen recorded 28 October 2026

7 Choose the right **suggestion**.

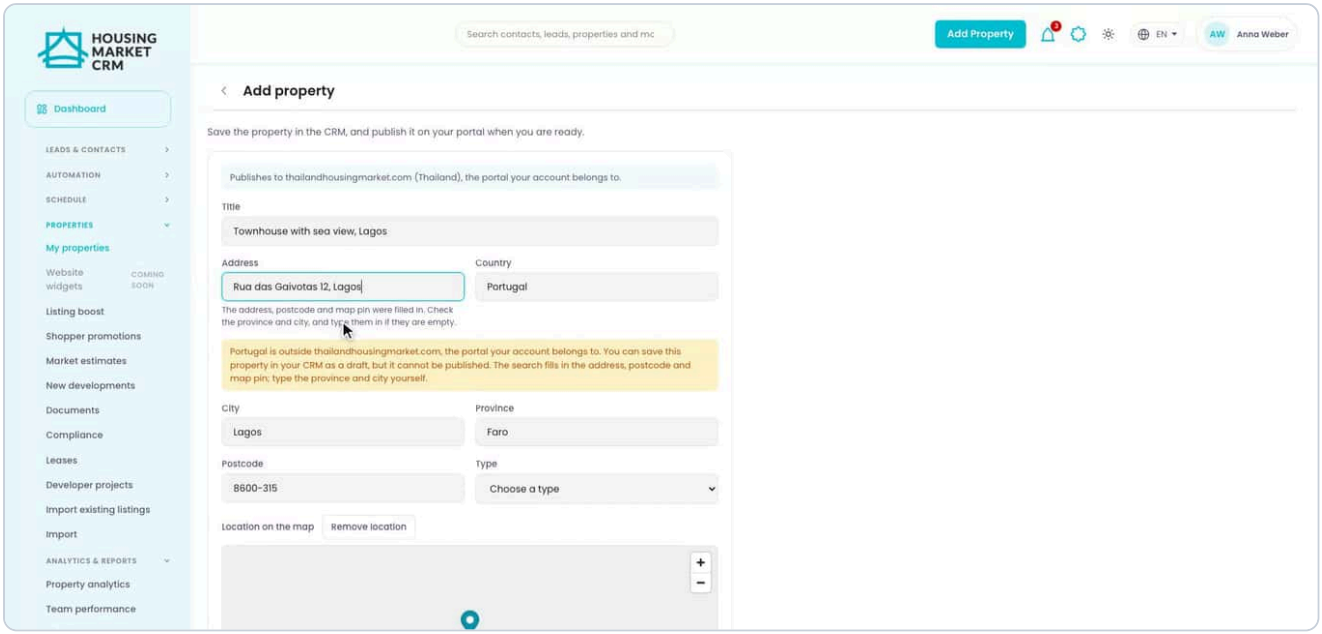


Figure 43.7 · Screen recorded 28 October 2026

8 The **address**, **postcode** and **map pin** are filled in for you.

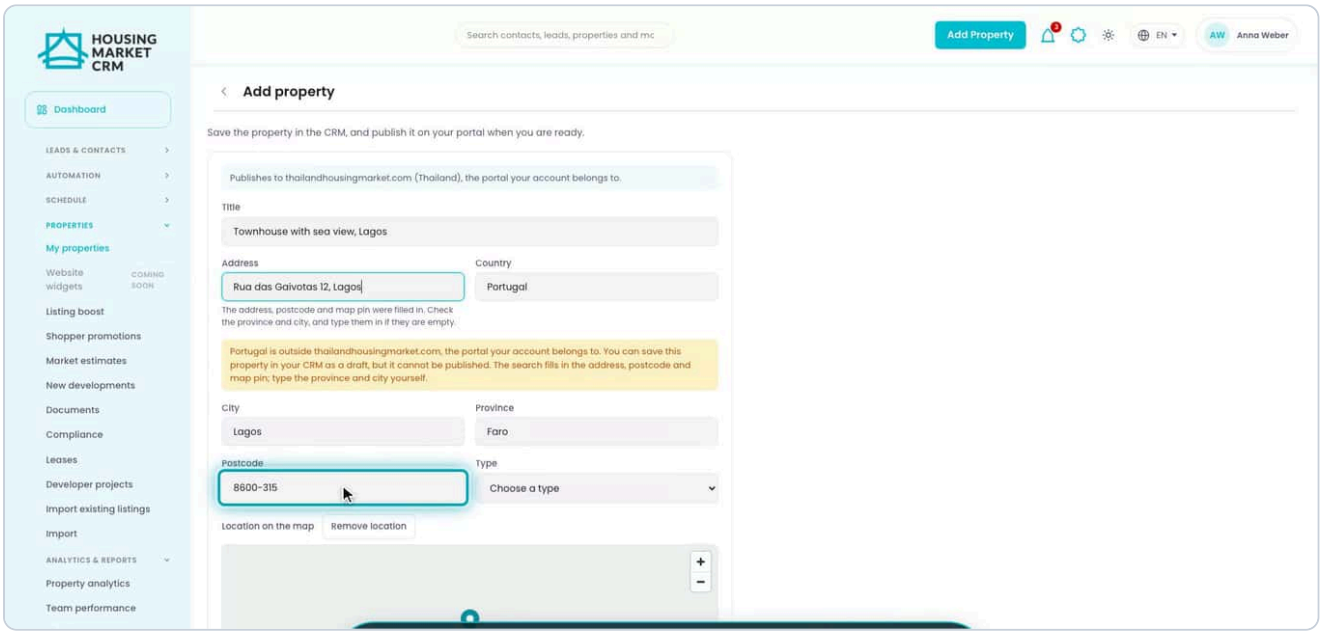


Figure 43.8 · Screen recorded 28 October 2026

9 Check the **city** and **province**; type them if they are empty.

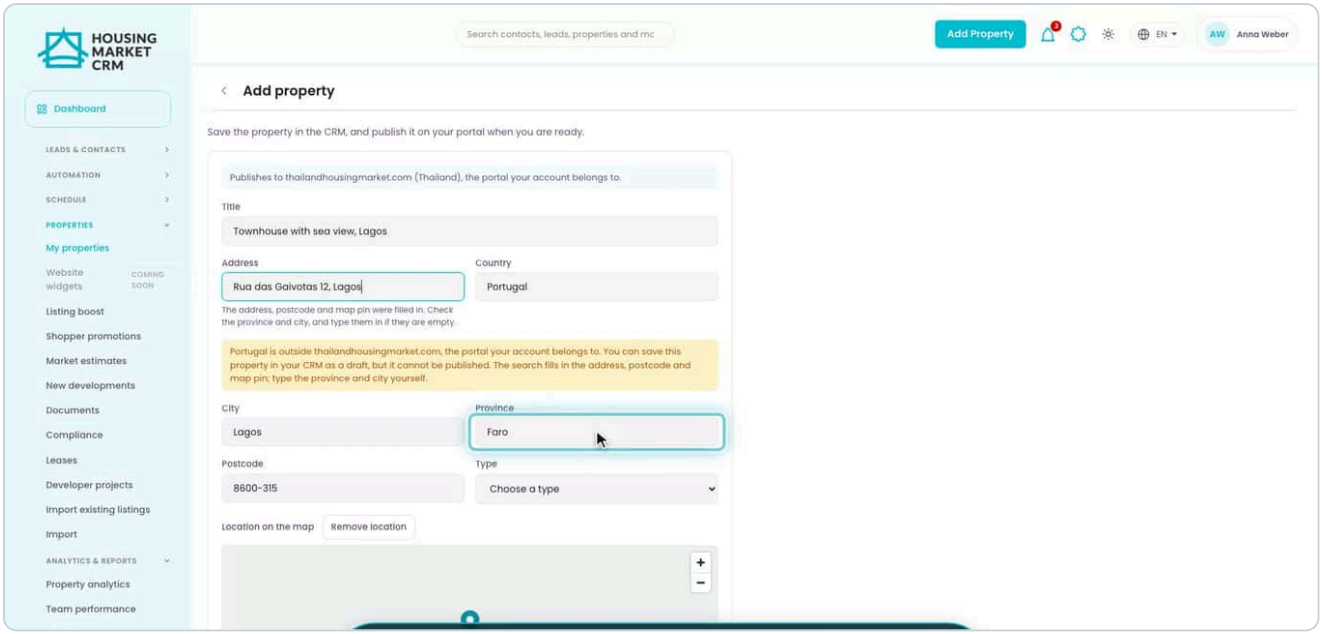


Figure 43.9 · Screen recorded 28 October 2026

10 Pick the **type** and the **price**.

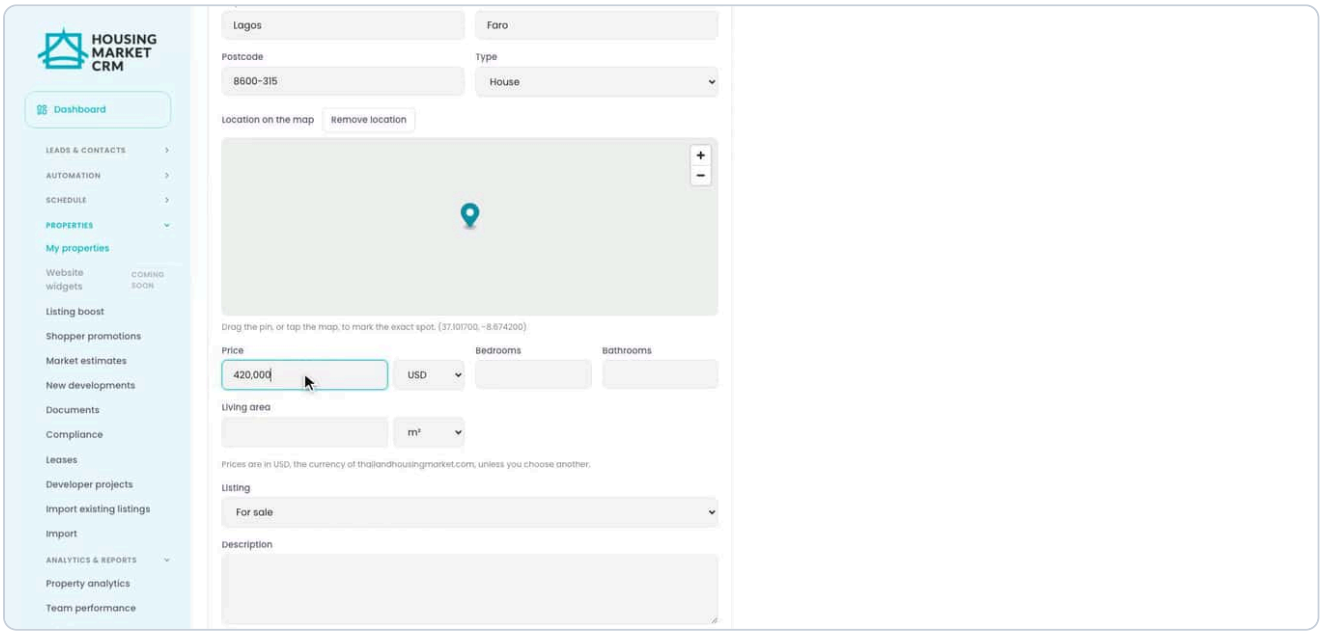


Figure 43.10 · Screen recorded 28 October 2026

11 Prices are in **USD** here.

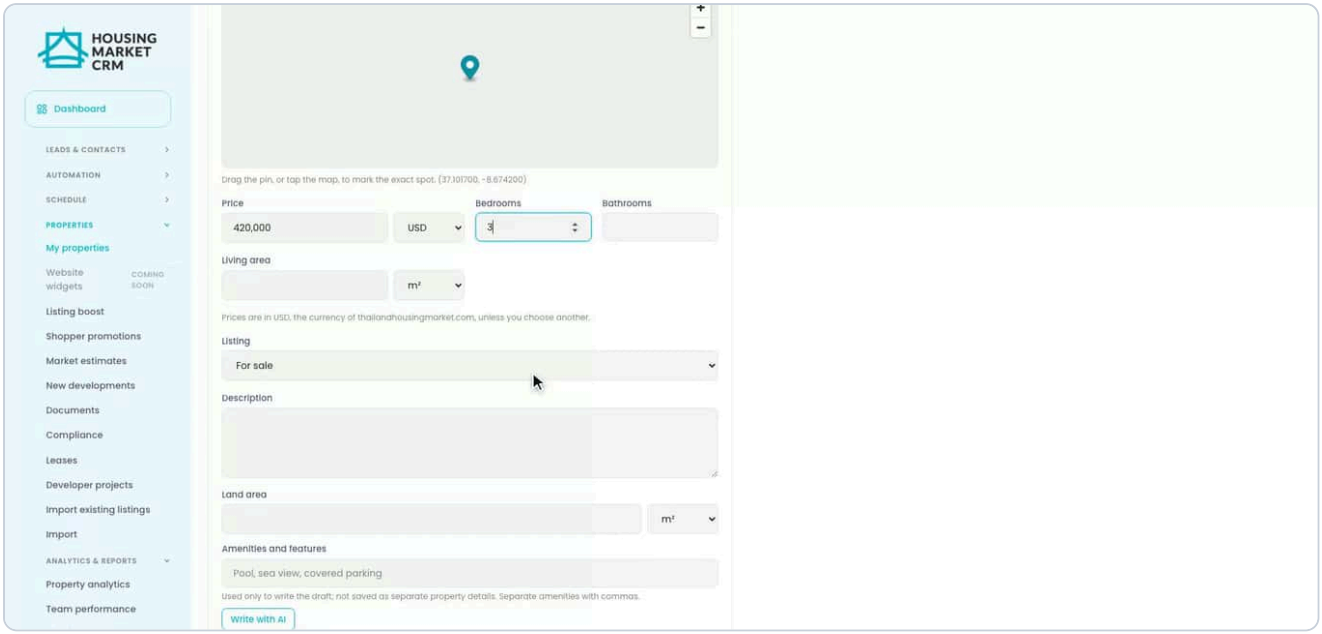


Figure 43.11 · Screen recorded 28 October 2026

12 Only properties in your **own portal's country** can be published.

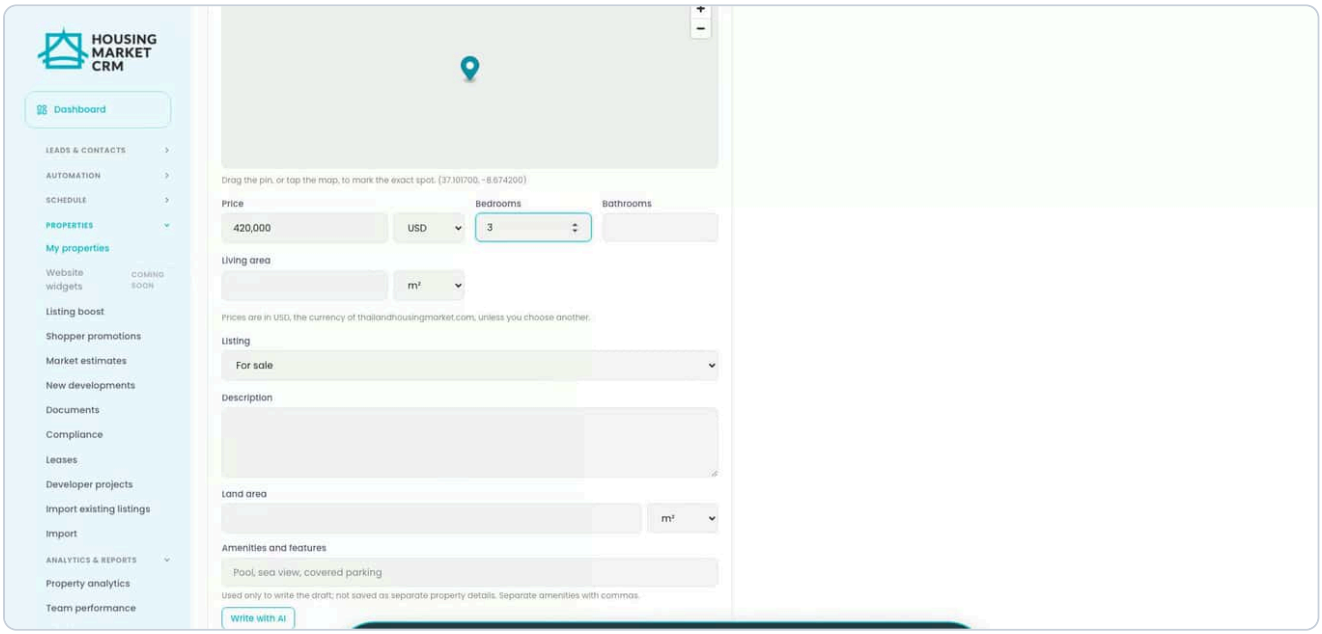


Figure 43.12 · Screen recorded 28 October 2026

13 Click **Save as draft**.

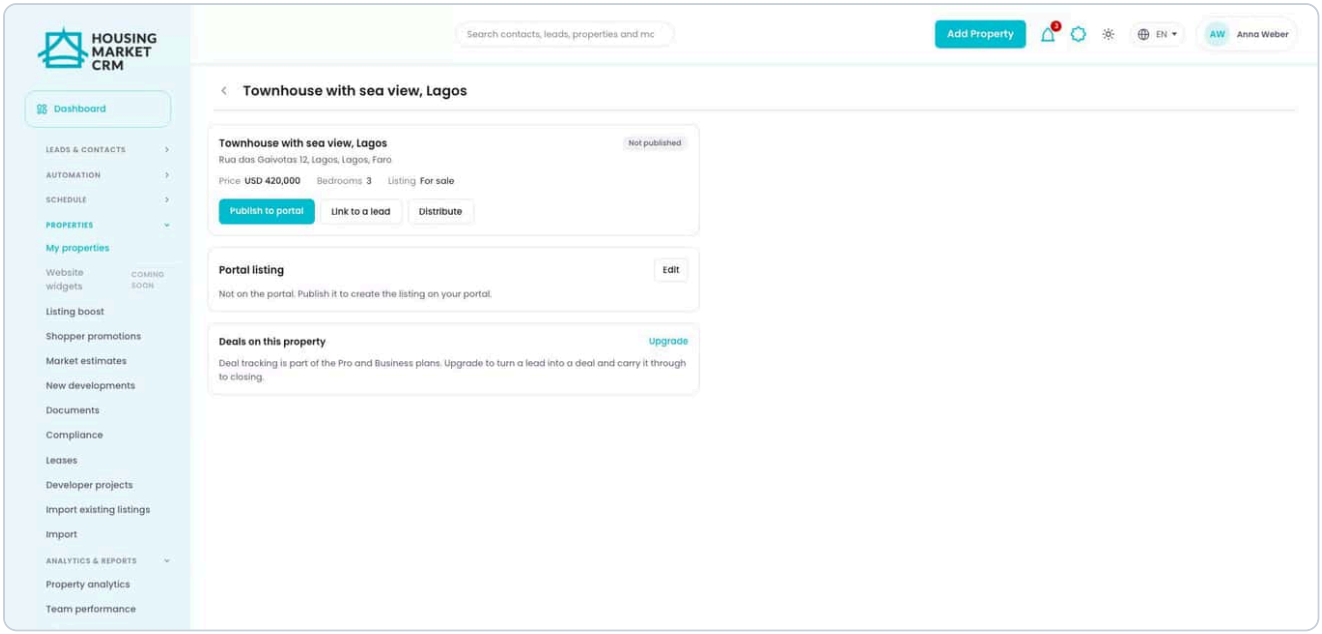


Figure 43.13 · Screen recorded 28 October 2026

14 Your property abroad is in the CRM, ready to **link to leads**.

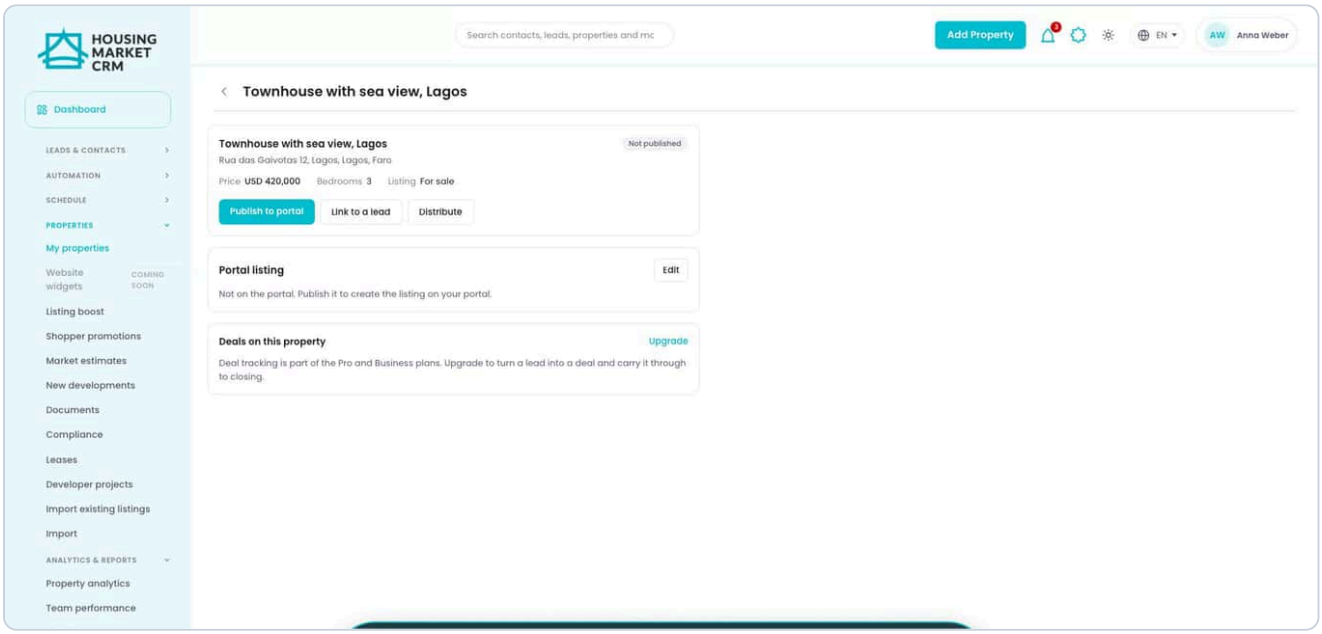


Figure 43.14 · Screen recorded 28 October 2026

44 CHAPTER 44

Run an open house sign-in with a QR code

All plans | For agents | Watch the video

OVERVIEW

Open one of your live listings in the CRM, choose Open house sign-in, make a sign-in page and print its poster. Visitors scan the QR code, sign in on their phone and become enquiries for the listing.

Open house sign-in is on every listing that is live on a portal, on every plan, Free included. Give the open house a name, for example Saturday 10:00 to 12:00, and choose Make the sign-in page. You get a sign-in address you can copy and a poster with a large QR code. Print the poster, or save it as a PDF from the print window, in the language you pick for it.

A visitor scans the code and sees a plain form in their own language: name, email, an optional phone number, an optional message and an unticked box to receive property emails from you. They need no account and no app.

Each sign-in becomes an enquiry for that listing, with the source Open house, and you get the usual new-enquiry notification. Someone who signs in twice at the same open house counts once. A visitor joins your marketing list only if they tick the box, and someone who has unsubscribed from your emails is not added again by a tick.

Choose Close sign-in when the open house is over. Nobody can sign in with the code after that and the page says the open house has ended, while the enquiries you already have stay.

From the Help Center: **How does open-house QR sign-in work?**

STEP BY STEP

1 Open **My properties** in Housing Market CRM.

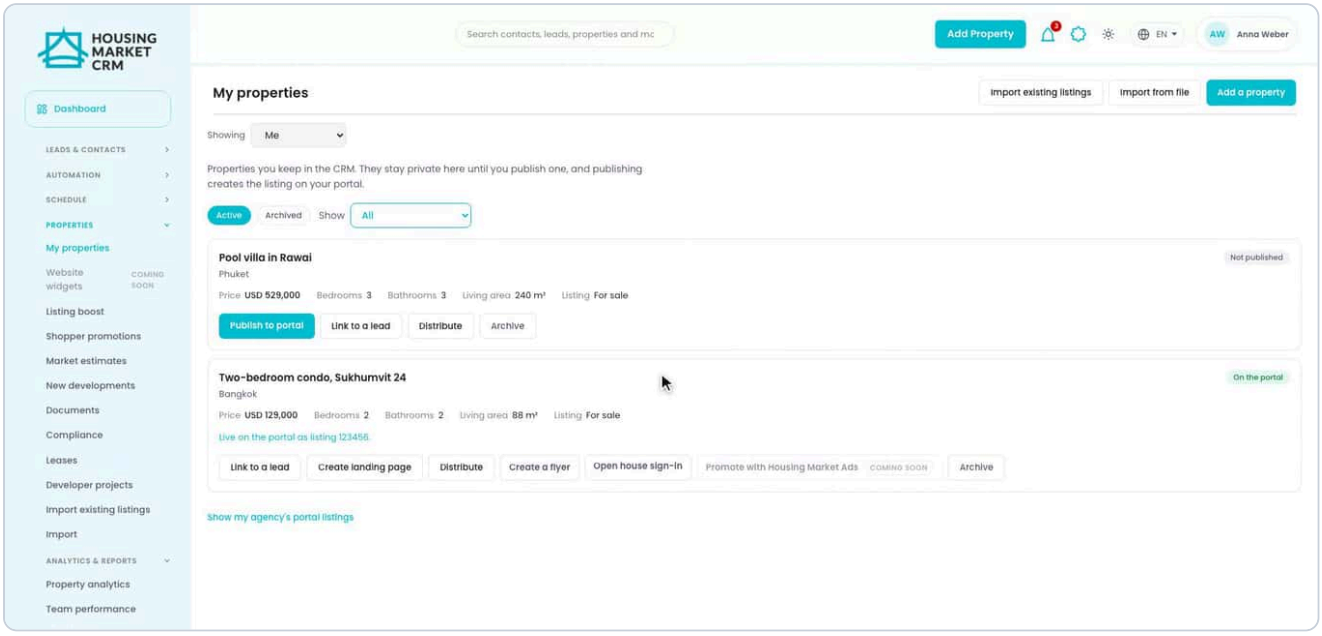


Figure 44.1 · Screen recorded 28 October 2026

2 Pick a listing that is **live on the portal**.

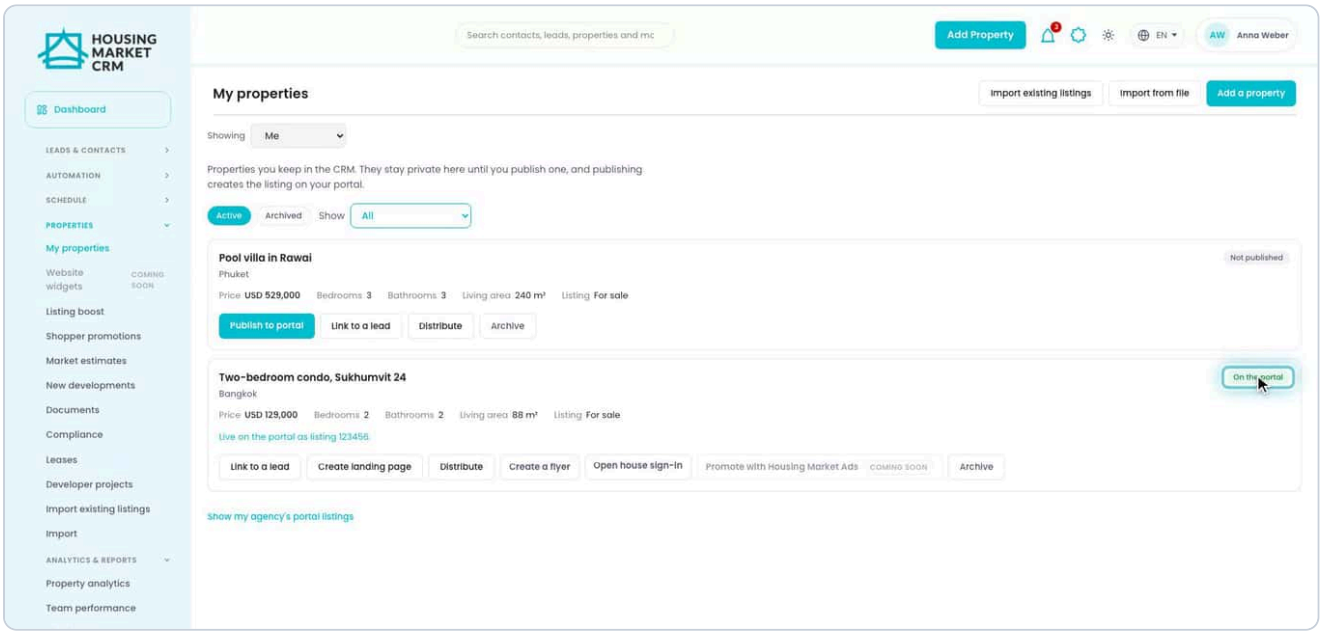


Figure 44.2 · Screen recorded 28 October 2026

3 Click **Open house sign-in**.

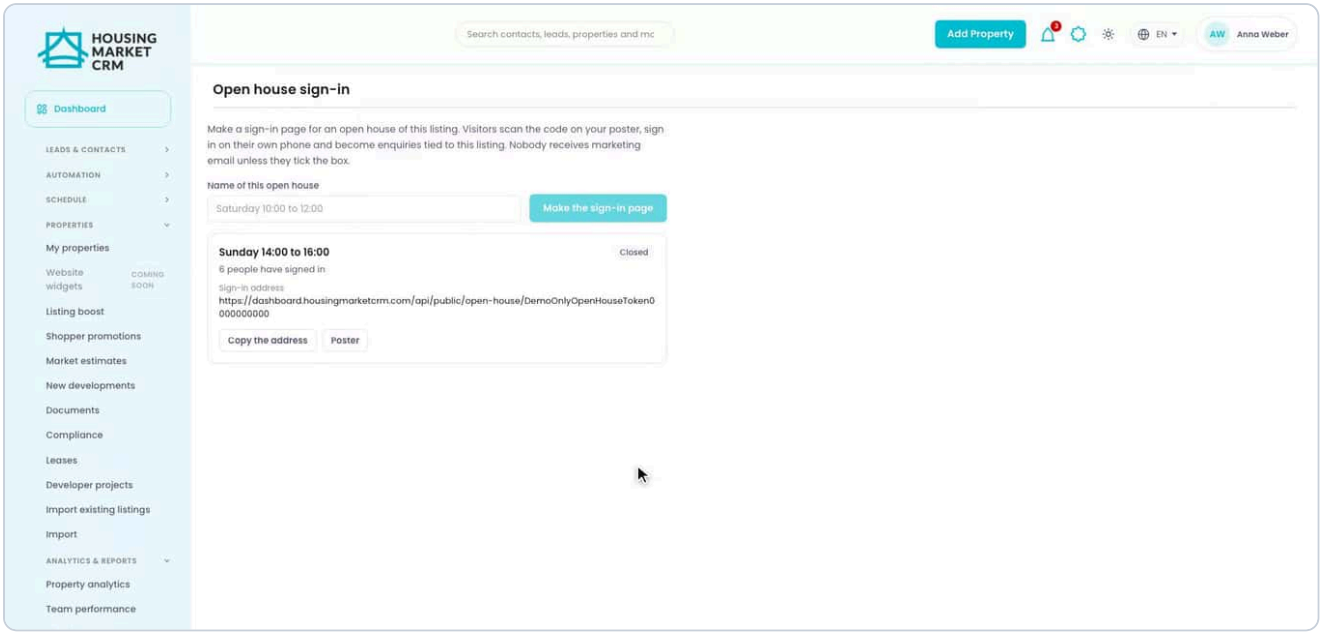


Figure 44.3 · Screen recorded 28 October 2026

4 Visitors scan your poster, **sign in on their phone** and become enquiries on this listing.

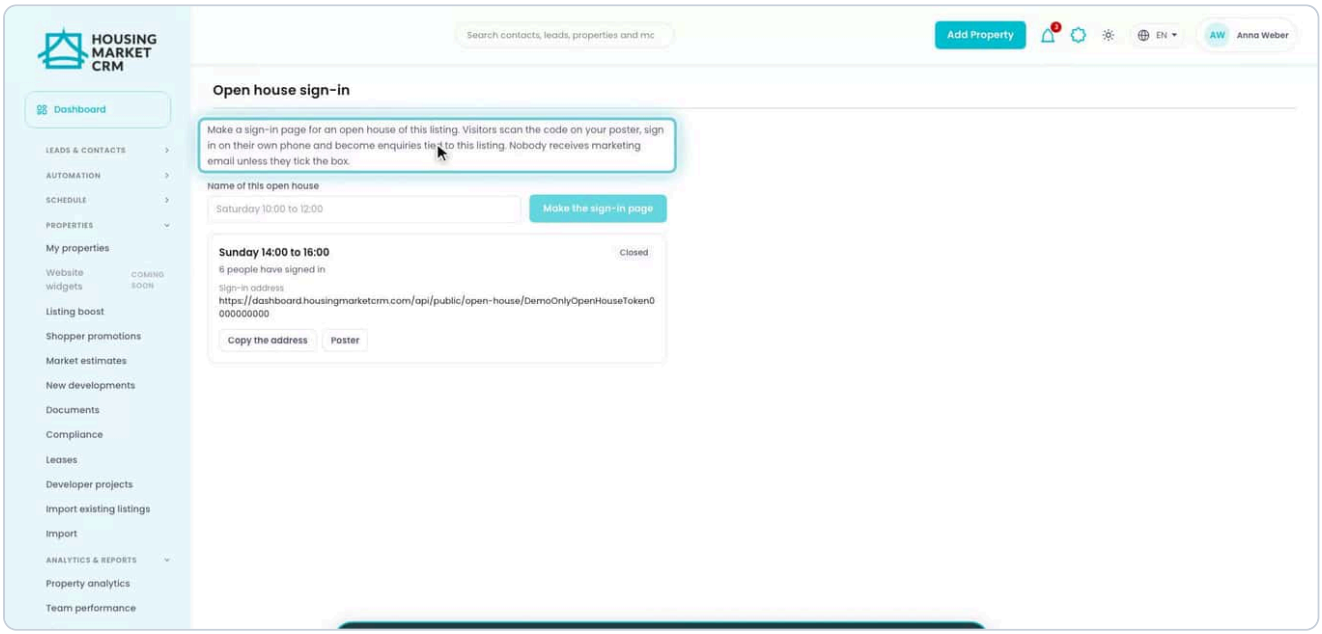


Figure 44.4 · Screen recorded 28 October 2026

5 Give the open house a **name**.

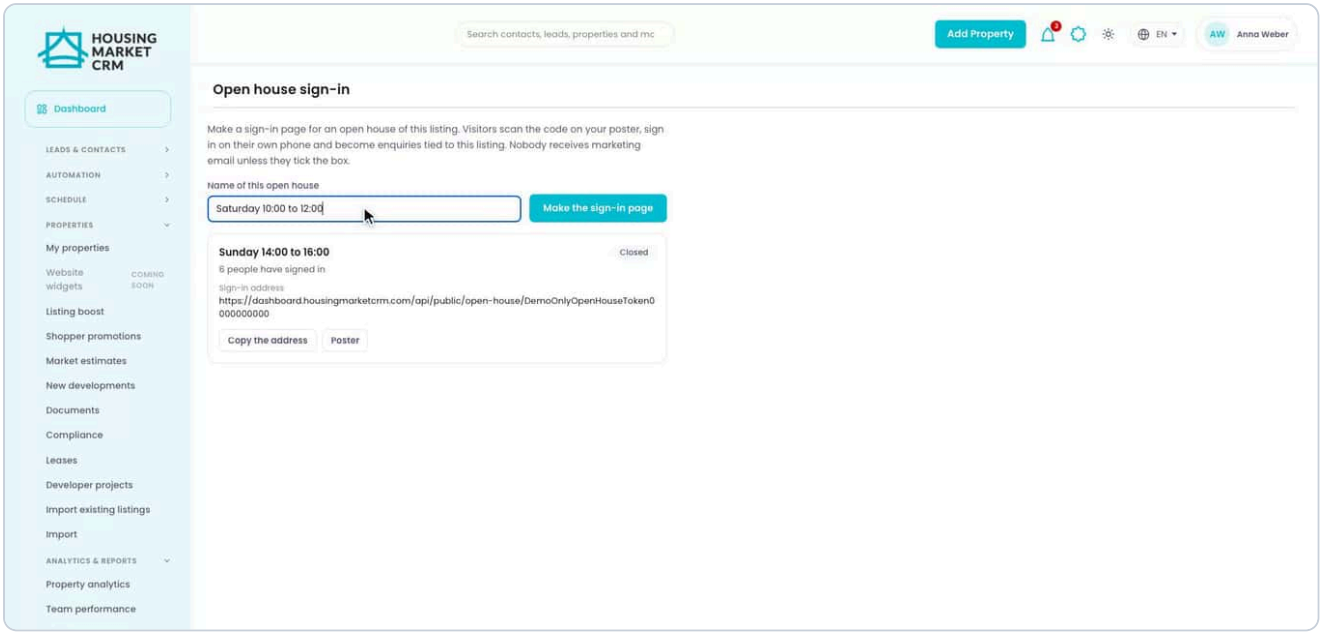


Figure 44.5 · Screen recorded 28 October 2026

6 Click **Make the sign-in page**.

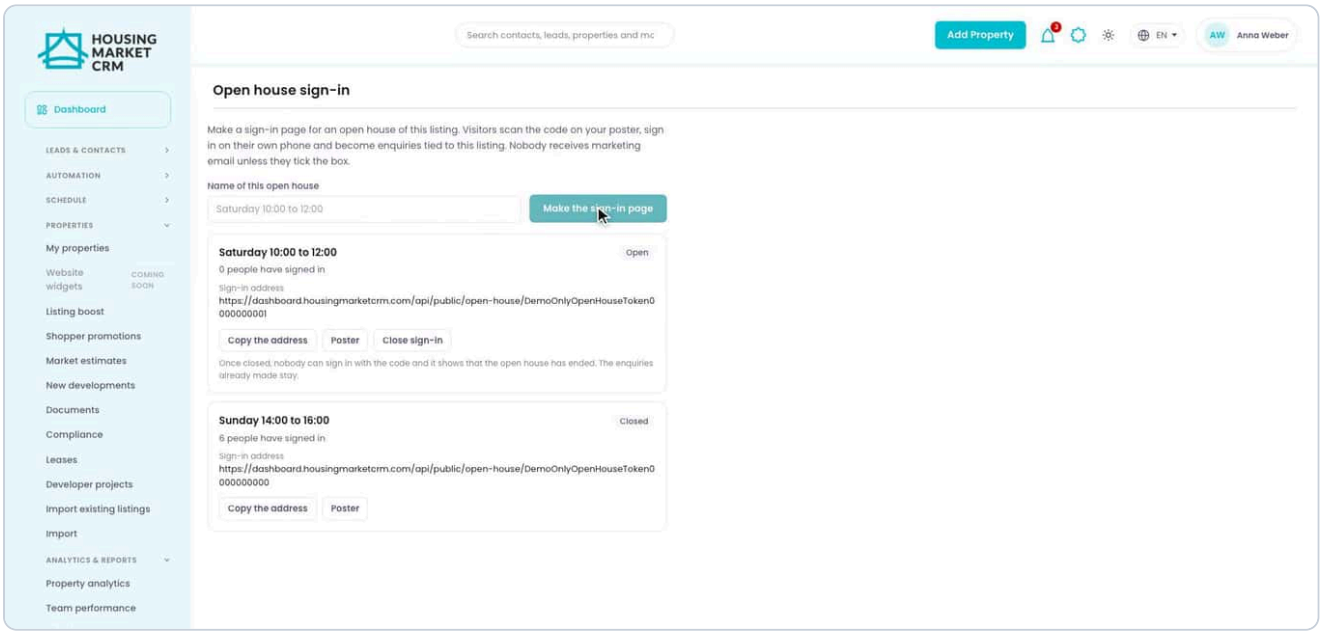


Figure 44.6 · Screen recorded 28 October 2026

7 This is the **sign-in address**. It is now **open**.

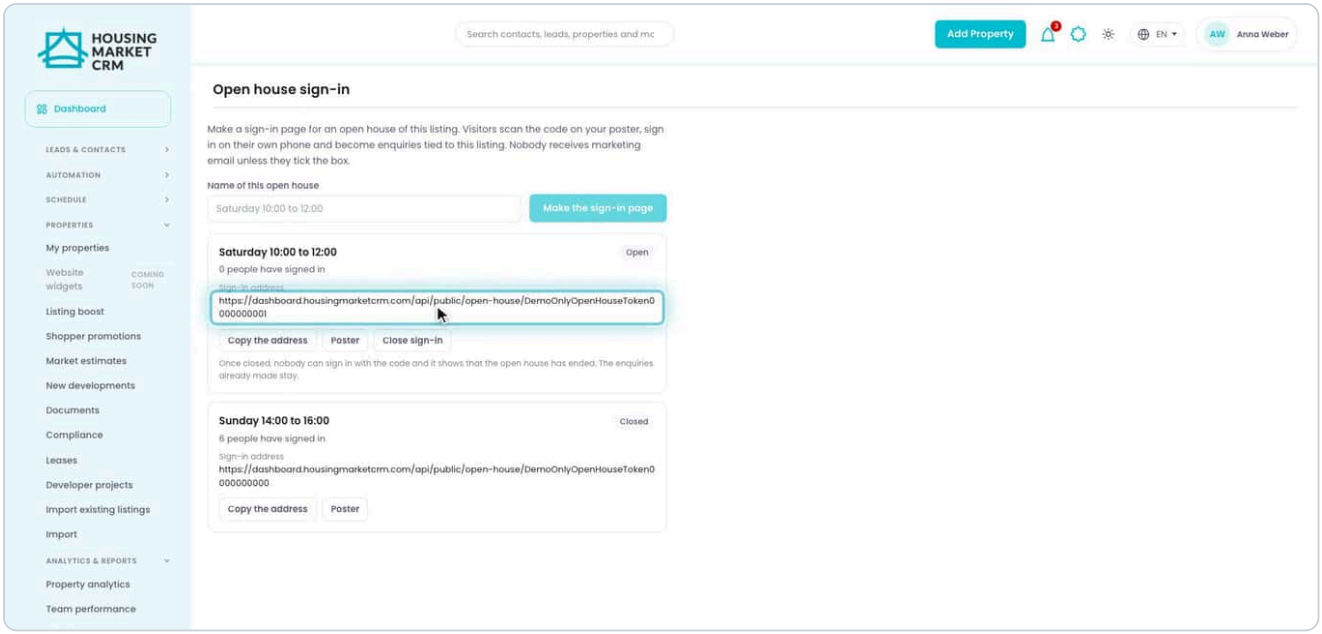


Figure 44.7 · Screen recorded 28 October 2026

8 Click **Copy the address** to share it yourself.

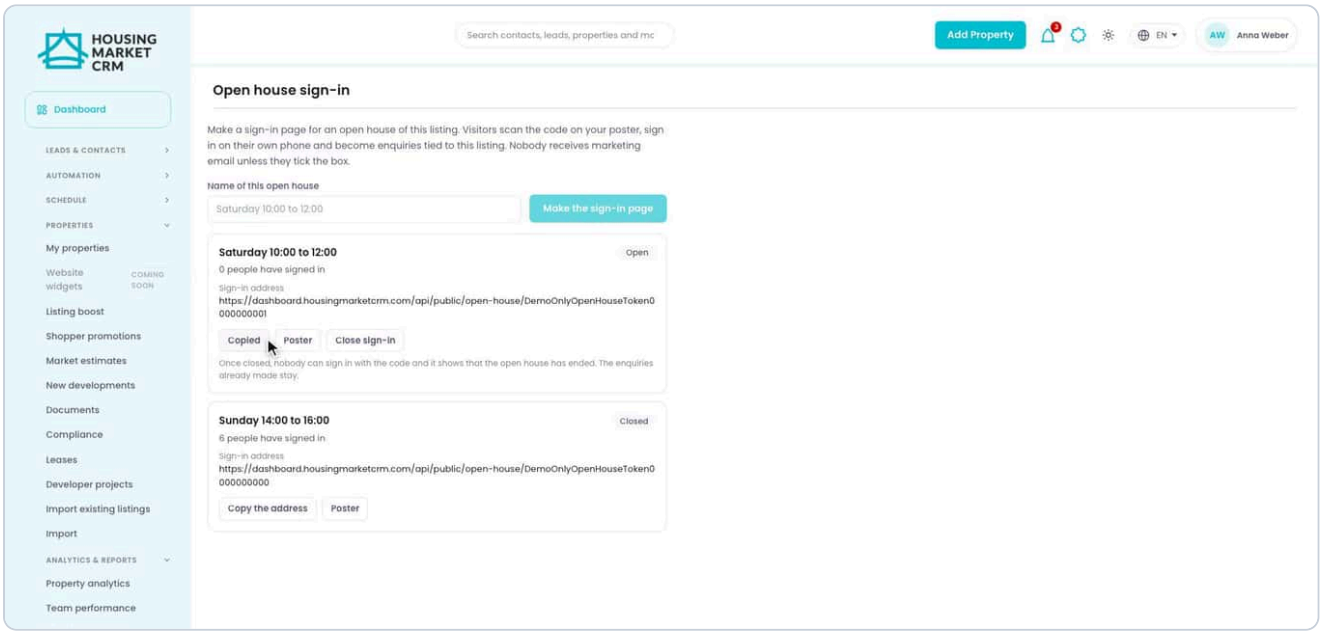


Figure 44.8 · Screen recorded 28 October 2026

9 Click **Poster** for a printable QR code.

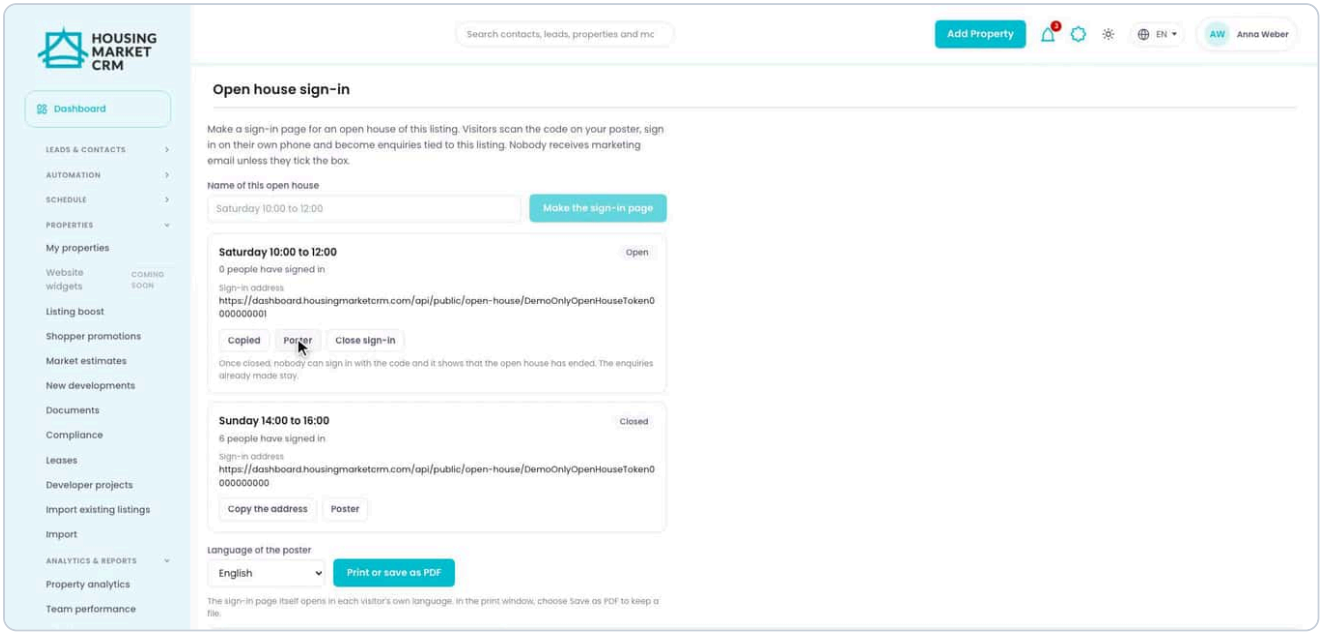


Figure 44.9 · Screen recorded 28 October 2026

10 Choose the **language of the poster**: seventeen are available.

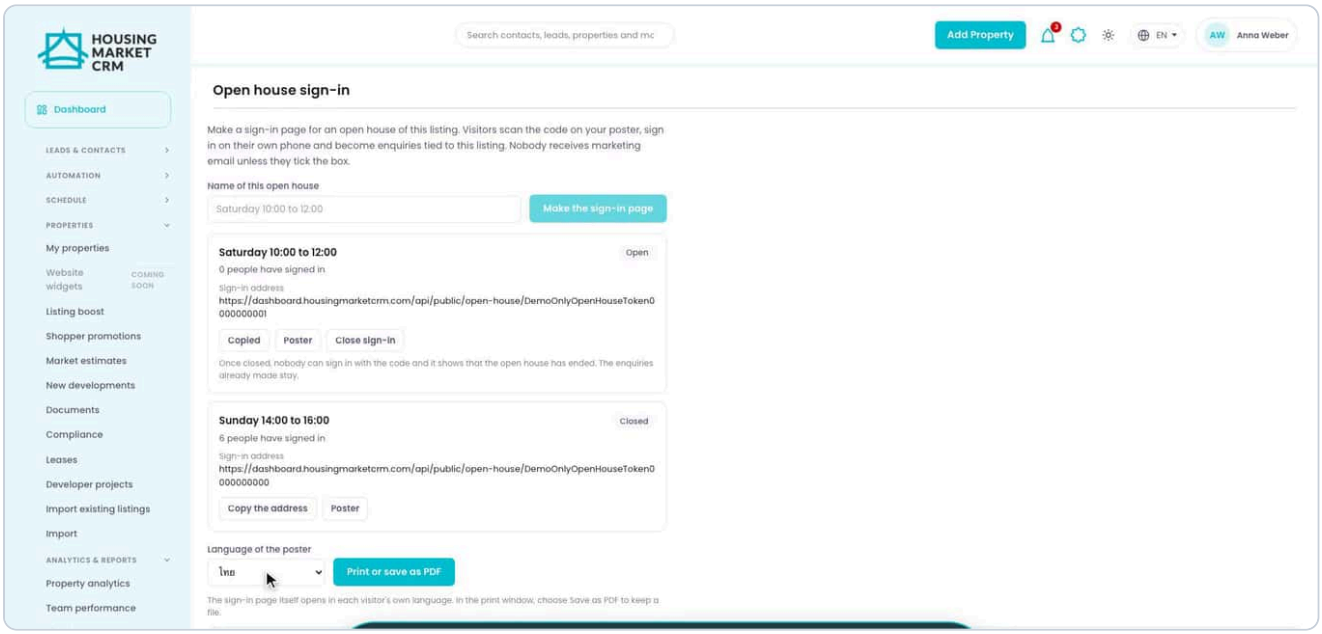


Figure 44.10 · Screen recorded 28 October 2026

11 The poster shows the listing and a **large QR code**.

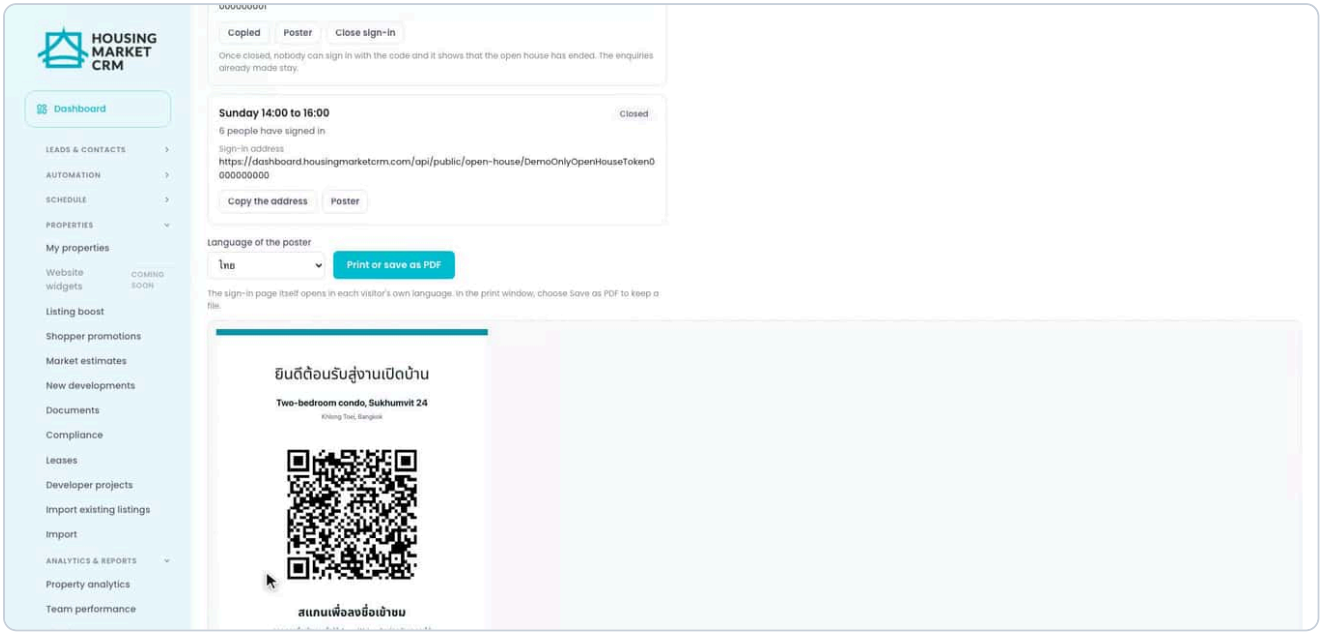


Figure 44.11 · Screen recorded 28 October 2026

12 Click **Print or save as PDF**, then put it up at the door.

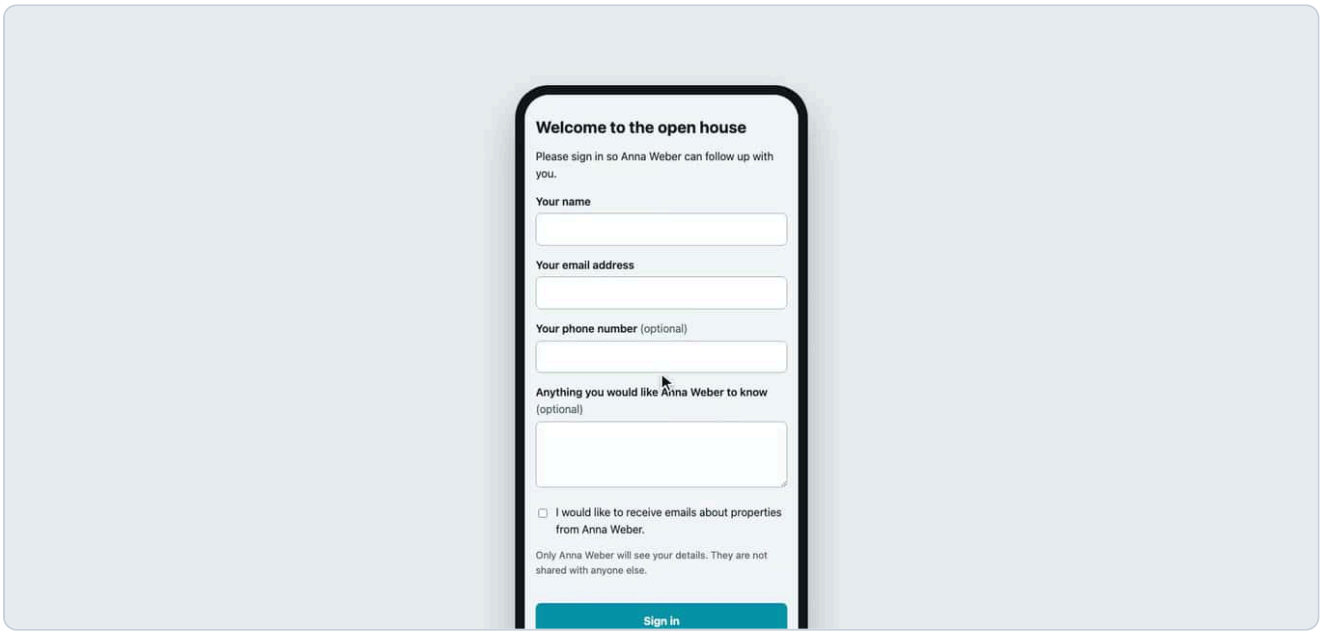


Figure 44.12 · Screen recorded 28 October 2026

13 Visitors scan the code and **sign in on their own phone**.

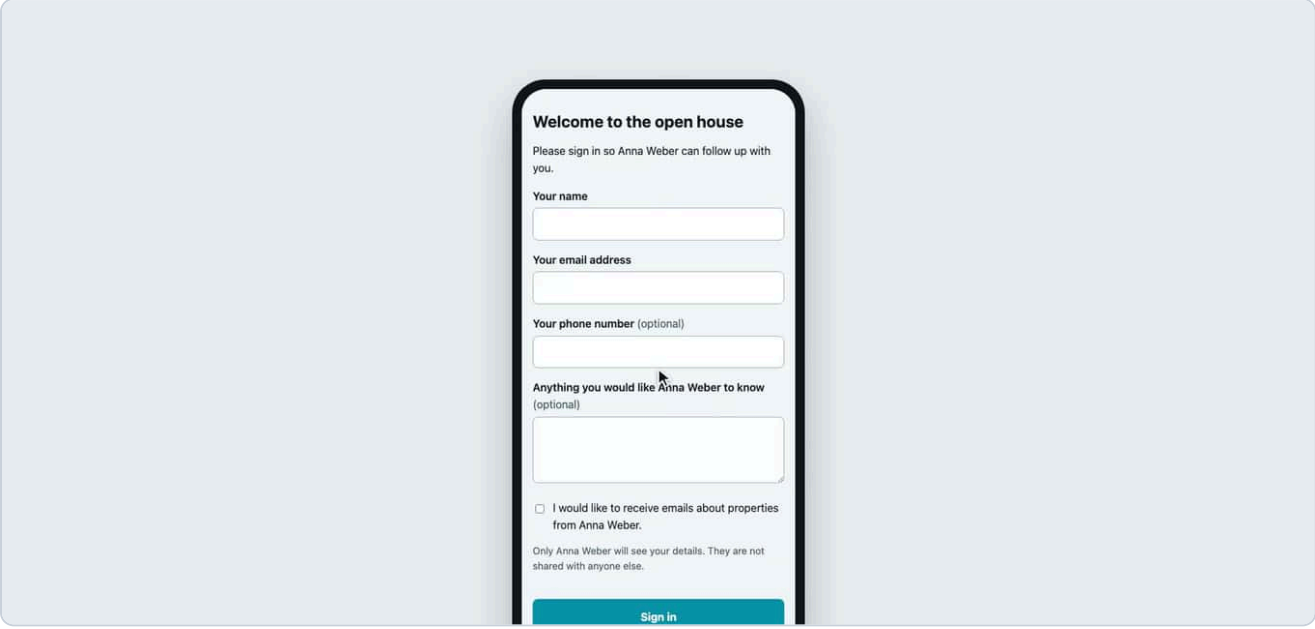


Figure 44.13 · Screen recorded 28 October 2026

14 They enter their **name** and **email address**.

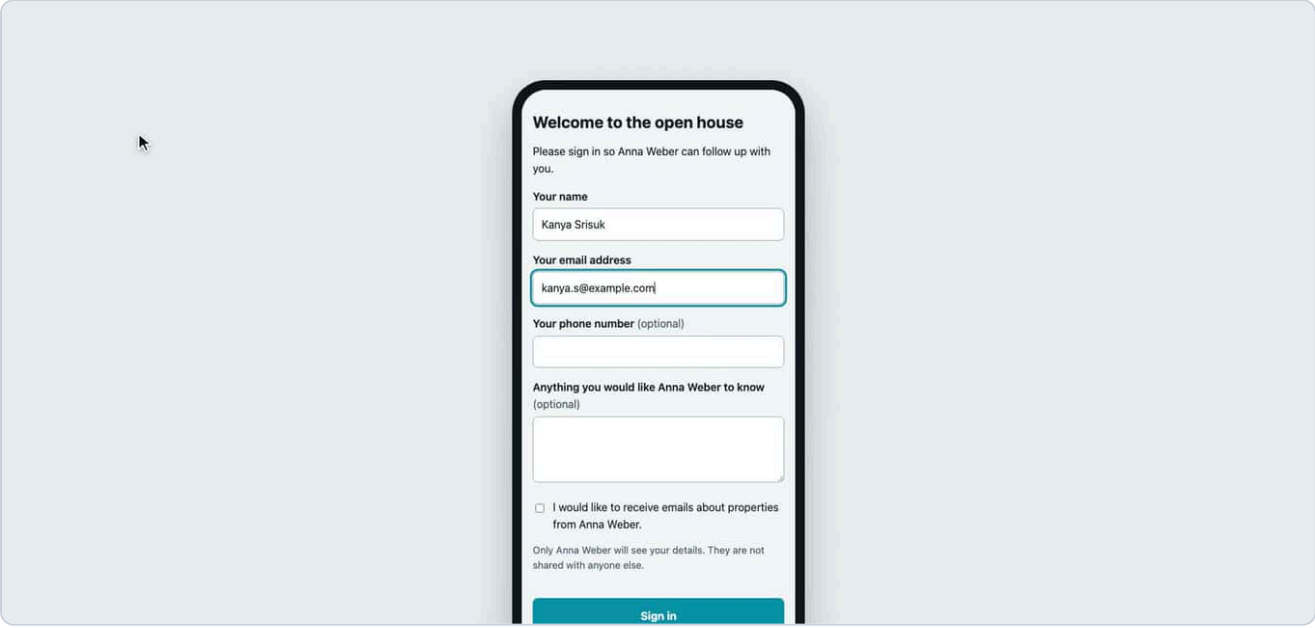


Figure 44.14 · Screen recorded 28 October 2026

15 Nobody gets marketing email **unless they tick this box**.

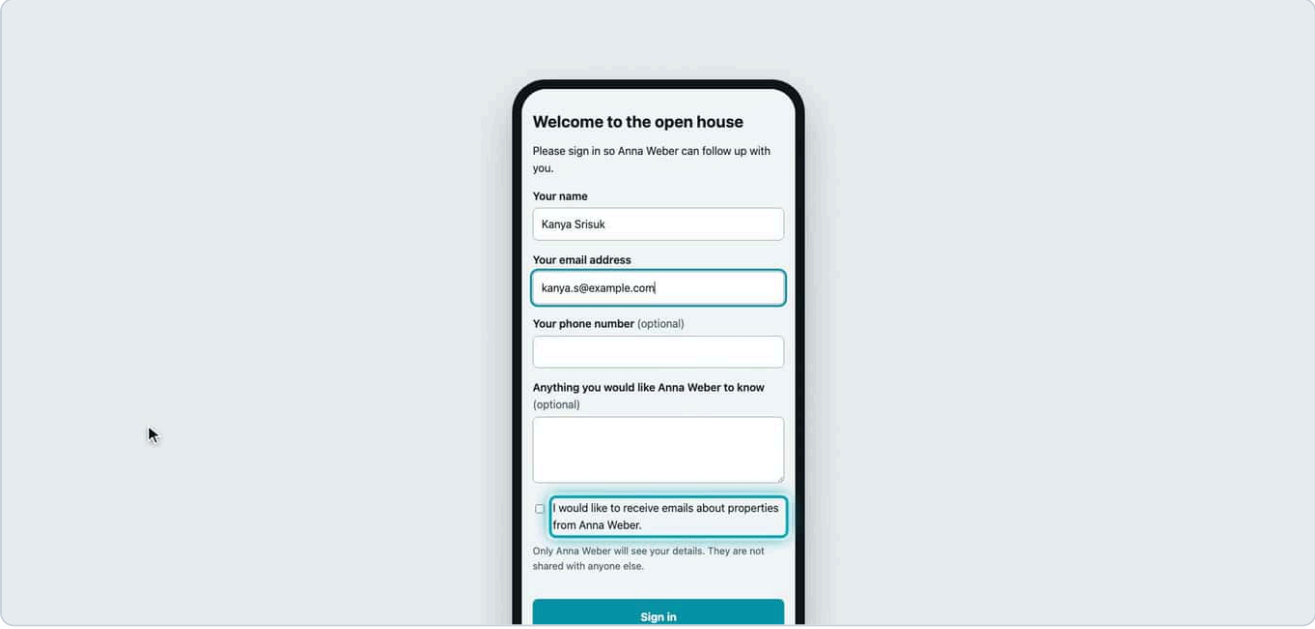


Figure 44.15 · Screen recorded 28 October 2026

16 Then they tap **Sign in**.

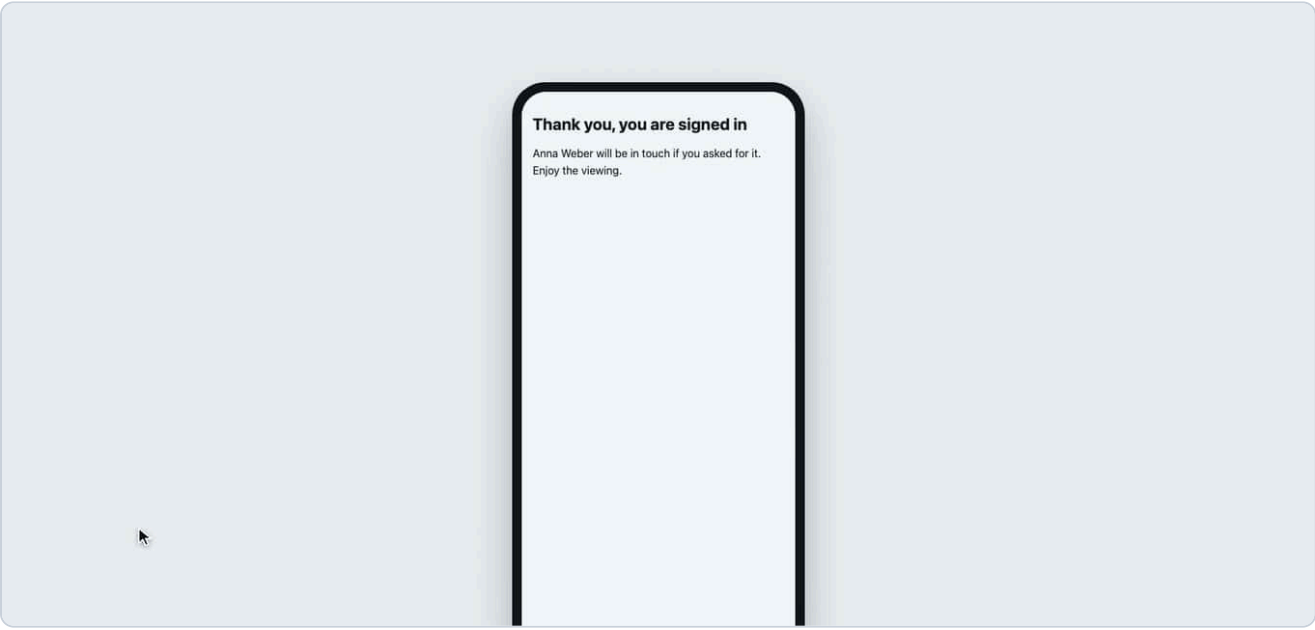


Figure 44.16 · Screen recorded 28 October 2026

17 Each visitor arrives in your CRM as an **enquiry on this listing**.

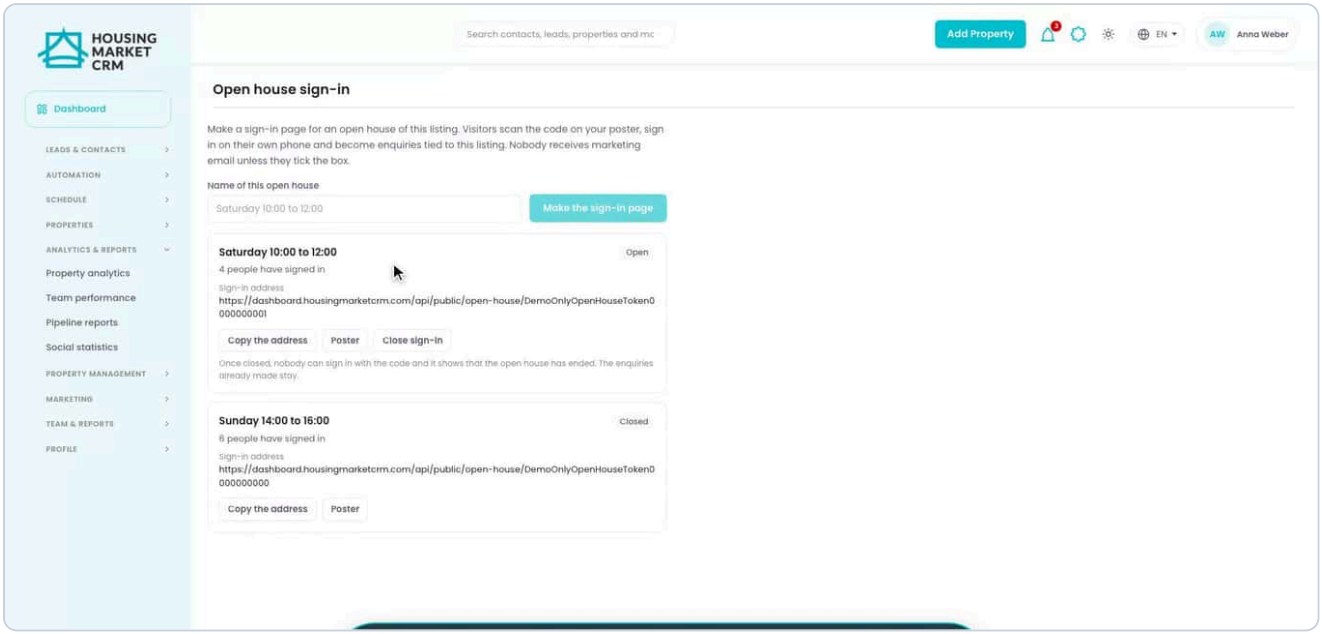


Figure 44.17 · Screen recorded 28 October 2026

18 Back in the CRM you see **how many people signed in**.

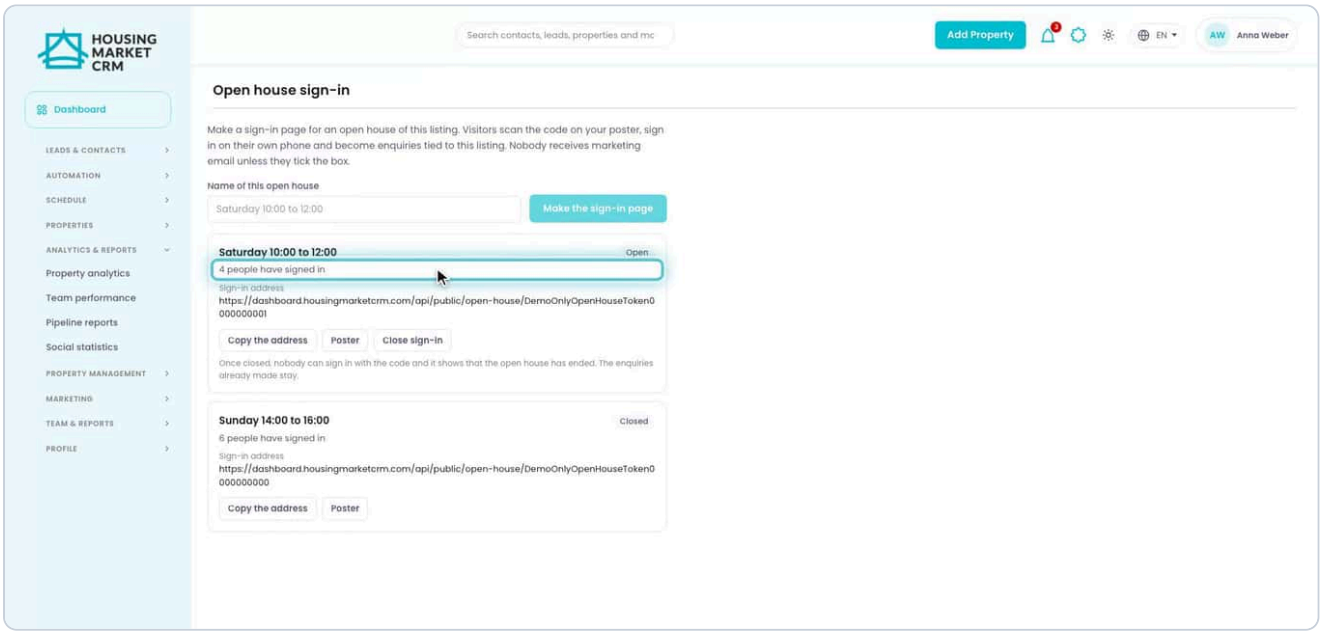


Figure 44.18 · Screen recorded 28 October 2026

19 When the open house is over, click **Close sign-in**.

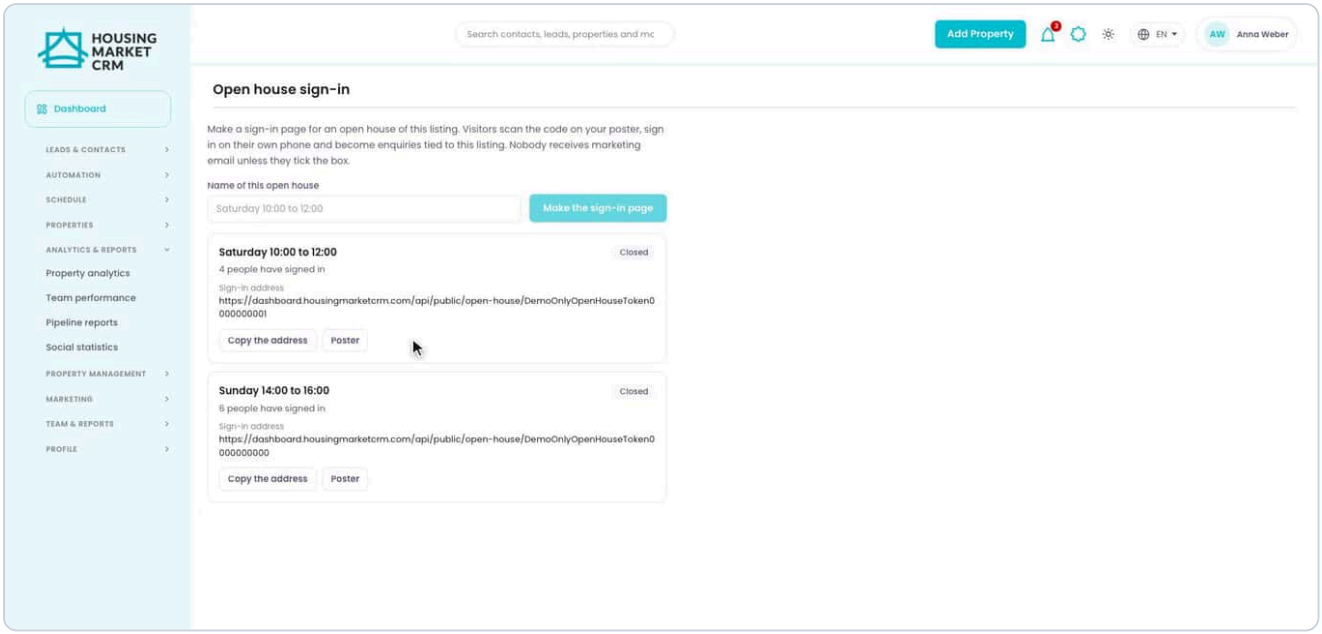


Figure 44.19 · Screen recorded 28 October 2026

20 Nobody can sign in any more. The **enquiries already made stay**.

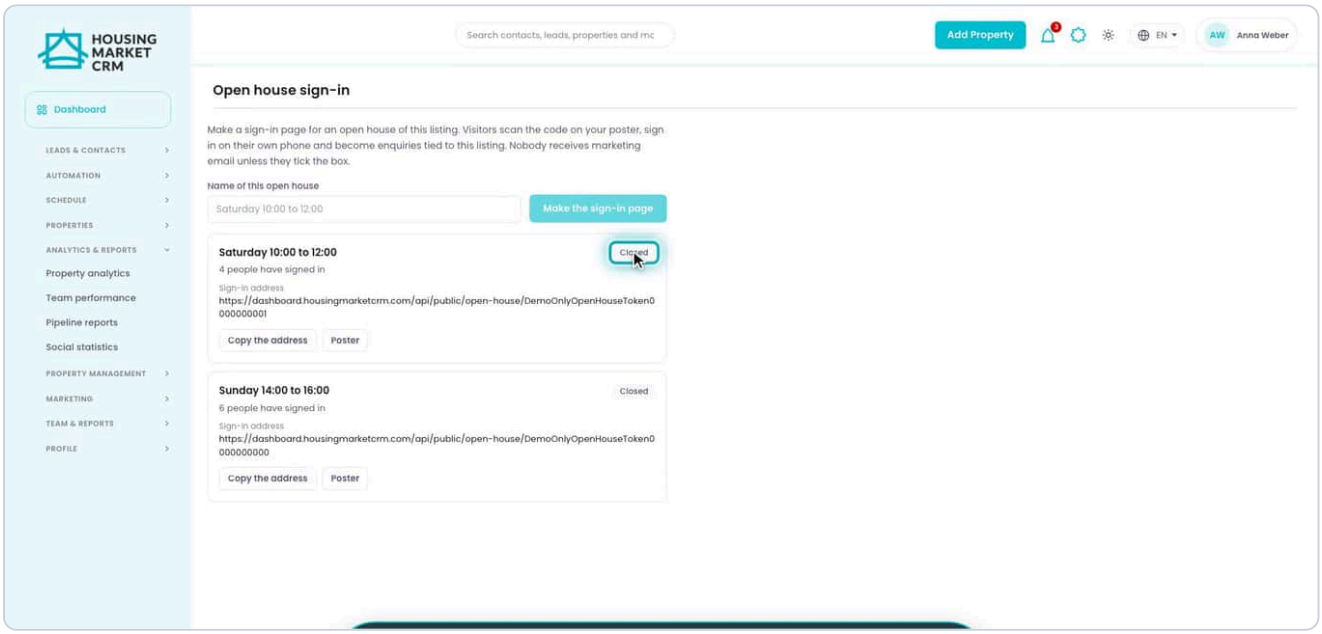


Figure 44.20 · Screen recorded 28 October 2026

21 Free on every plan, for any listing live on a portal.

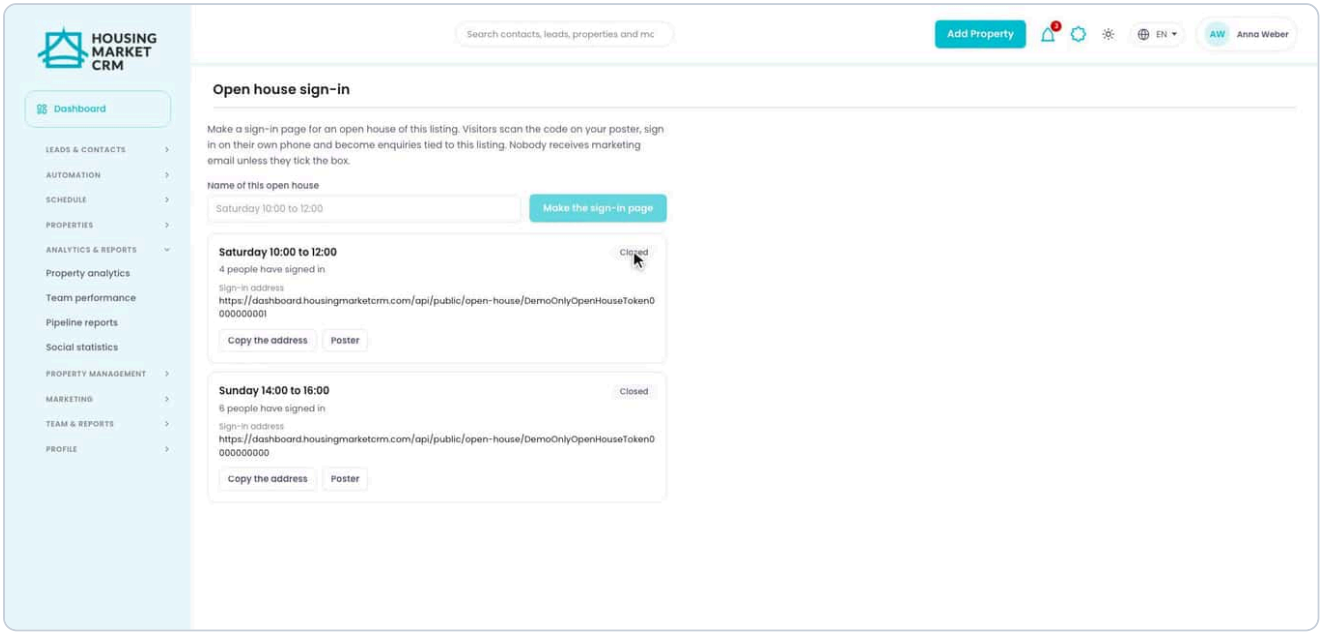


Figure 44.21 · Screen recorded 28 October 2026

45 CHAPTER 45

Print a listing flyer with a QR code

All plans | For agents | Watch the video

OVERVIEW

Open one of your live listings in the CRM and choose Create a flyer. Print it or save it as a PDF; its QR code opens the listing on its portal.

Create a flyer is on every listing that is published on a portal. It opens a printable A4 page with the photo, the title and location, the price, the bedrooms, bathrooms and area, your name and details, and a QR code. Choose the language of the buyers the flyer is for, and the words on the sheet are printed in that language.

Choose Print or save as PDF, and in the print window choose Save as PDF to keep a file. The flyer is drawn from the listing each time, so a changed price shows on the next print.

The QR code carries the listing's own portal address. Scans are counted as visits to the listing, and the page shows how many people scanned. An enquiry made within 30 days of a scan, on the same device, is marked with the source Listing flyer. A listing has one flyer, so the code stays the same across prints.

A flyer needs a live listing of your own. A draft, a colleague's listing or a property that exists only in your CRM cannot have one. The flyer is part of every plan, Free included.

From the Help Center: **How do I make a listing flyer with a QR code?**

STEP BY STEP

1 Open **My properties** in Housing Market CRM.

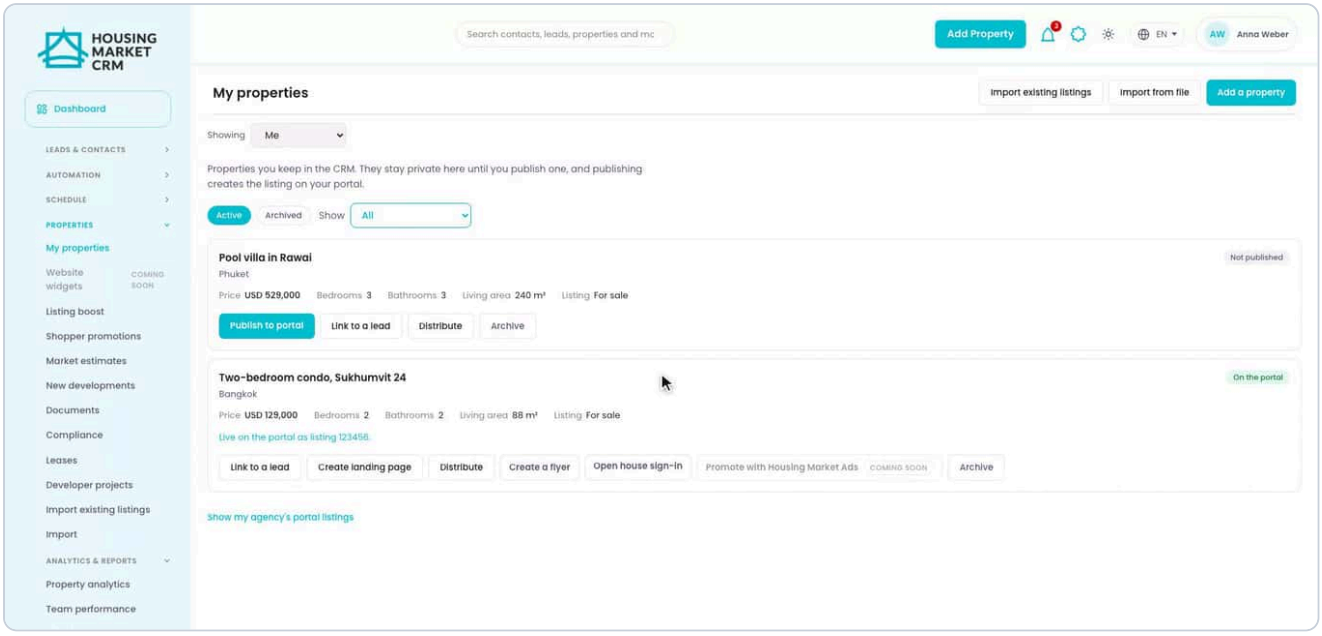


Figure 45.1 · Screen recorded 28 October 2026

2 Flyers are for listings that are **live on the portal**.

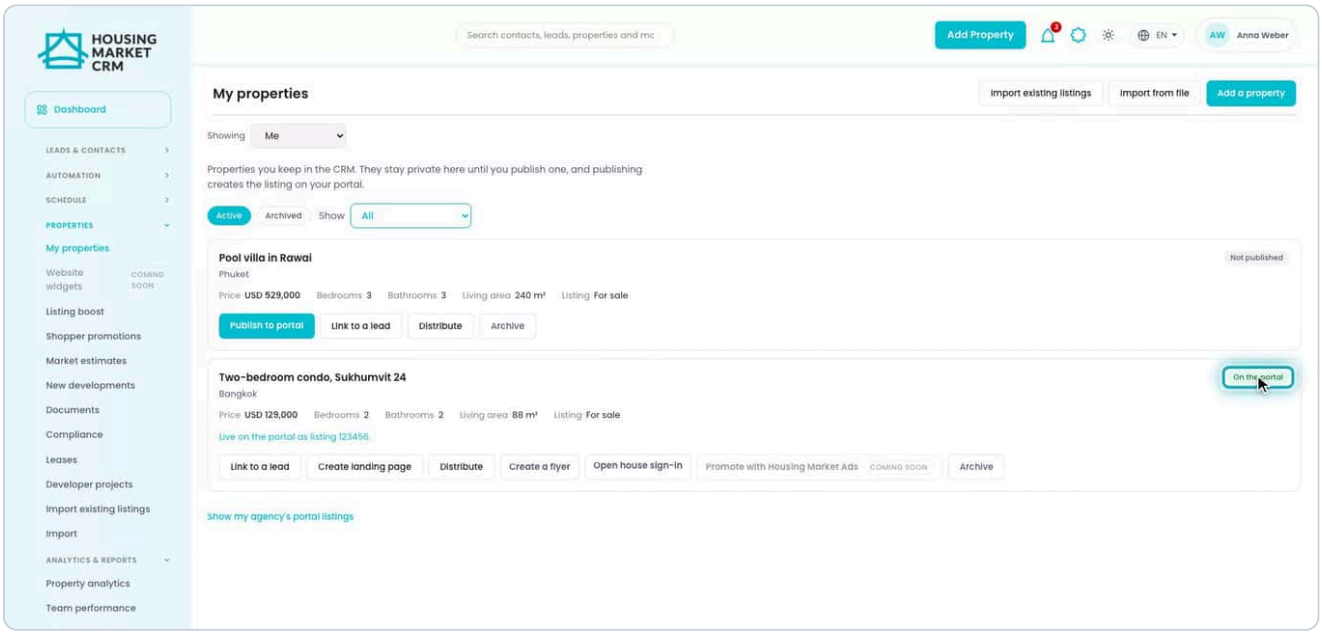


Figure 45.2 · Screen recorded 28 October 2026

3 Click **Create a flyer**.

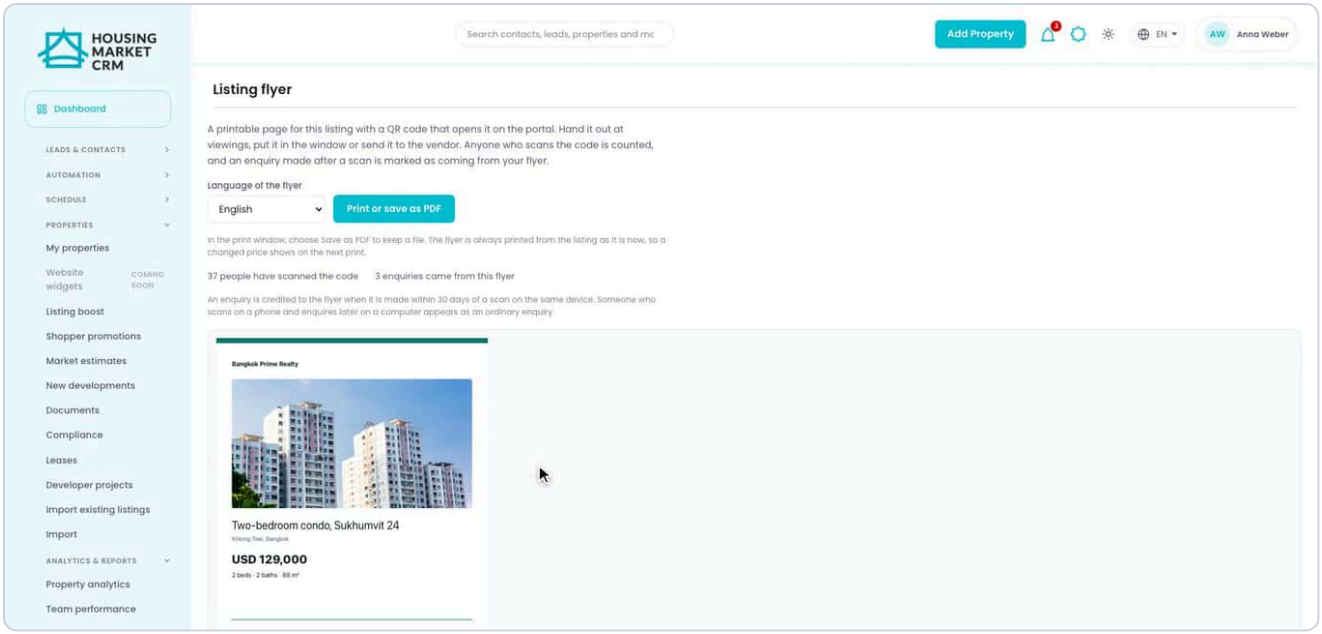


Figure 45.3 · Screen recorded 28 October 2026

4 One printable page with a **QR code** that opens the listing on the portal.

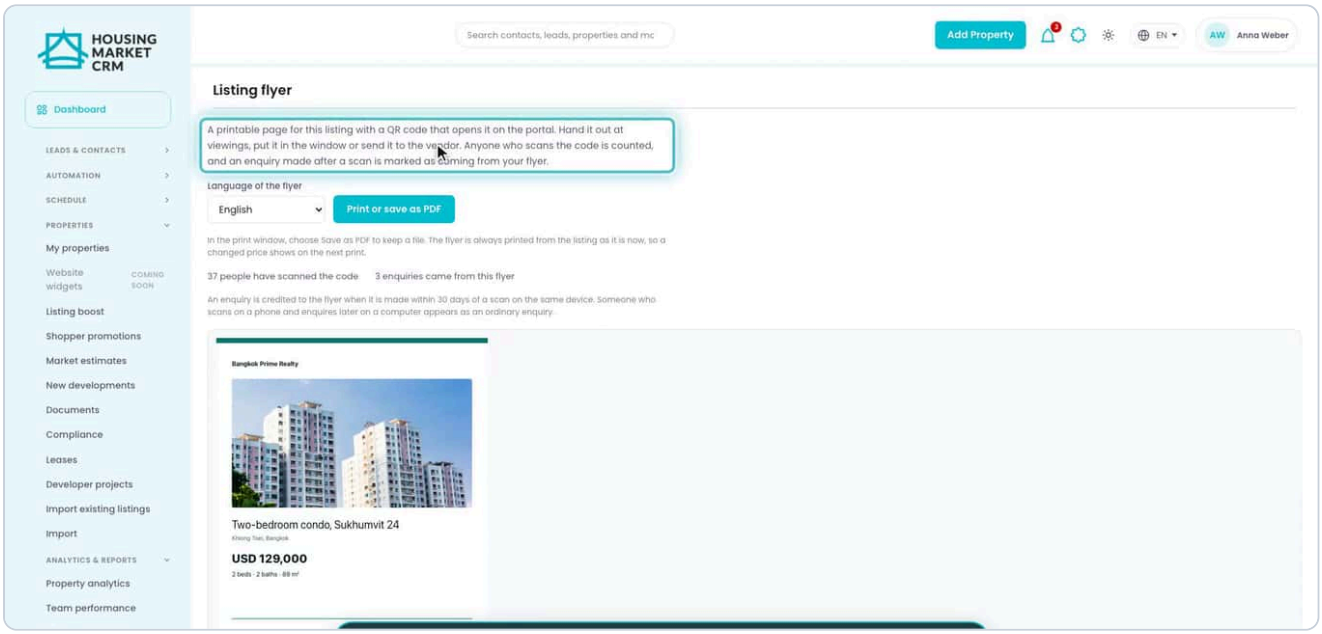


Figure 45.4 · Screen recorded 28 October 2026

5 Photo, price, key facts and **your contact details**, taken from the live listing.

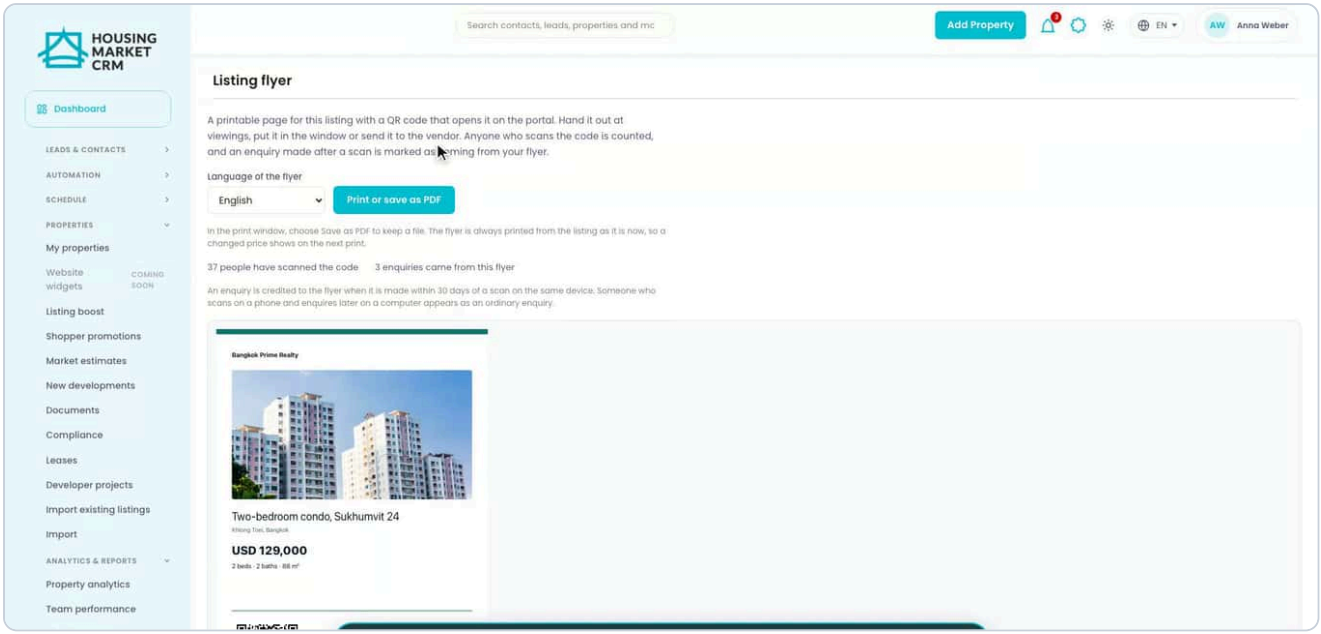


Figure 45.5 · Screen recorded 28 October 2026

6 Buyers **scan the code** to open the listing.

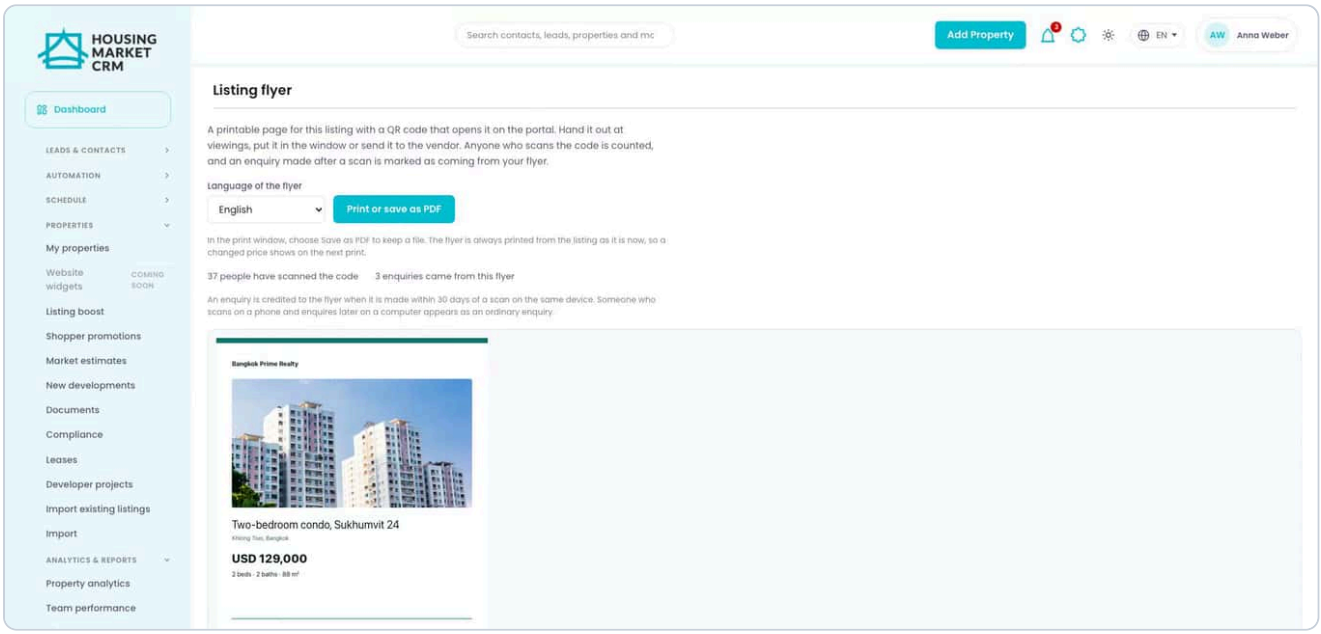


Figure 45.6 · Screen recorded 28 October 2026

7 Choose the **language of the flyer** for the buyers you hand it to.

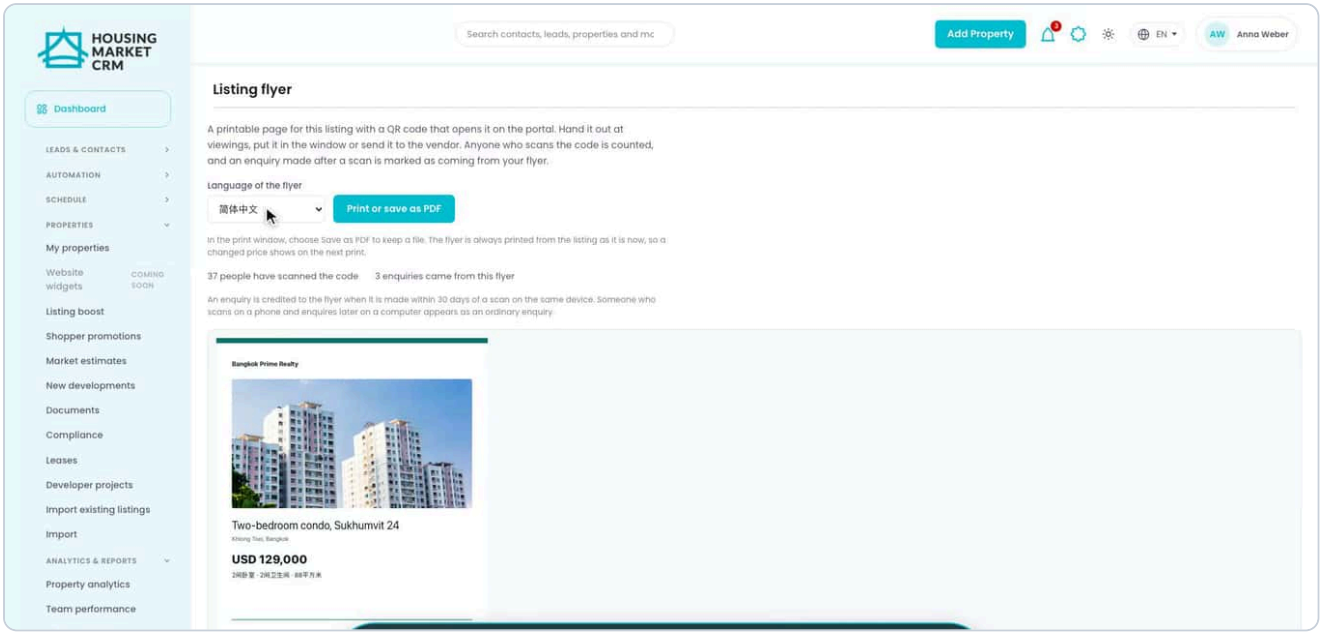


Figure 45.7 · Screen recorded 28 October 2026

8 The labels on the flyer change language.

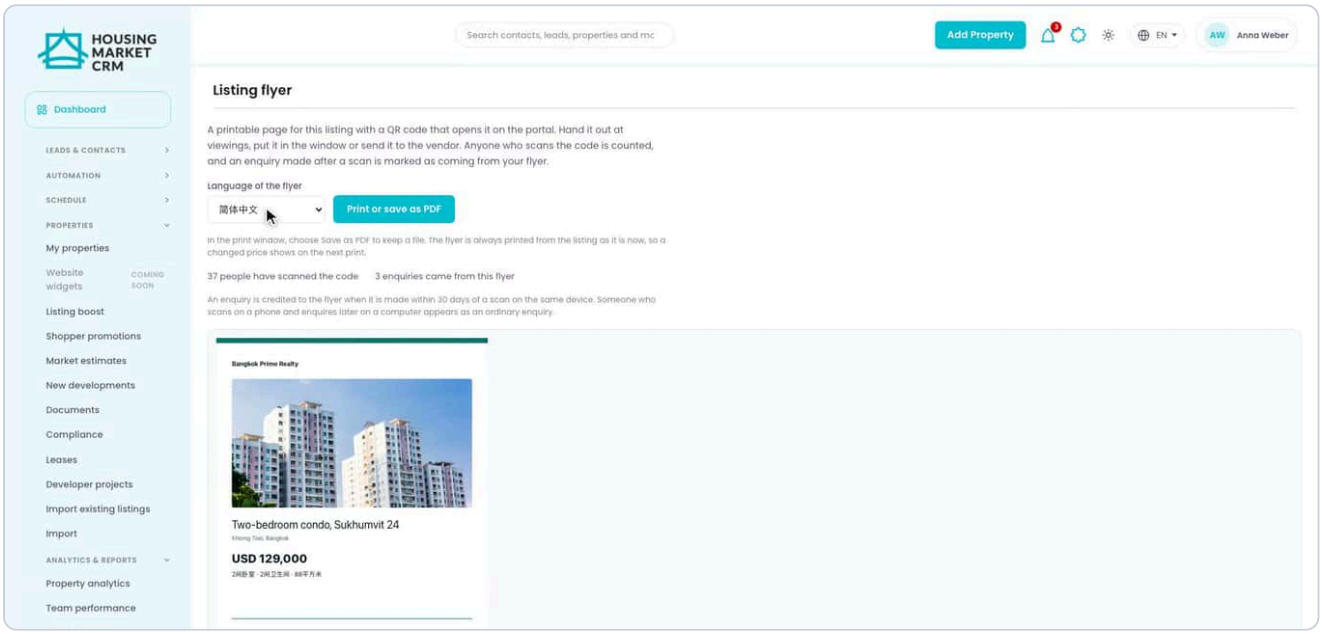


Figure 45.8 · Screen recorded 28 October 2026

9 Click **Print or save as PDF**. Choose **Save as PDF** to keep a file.

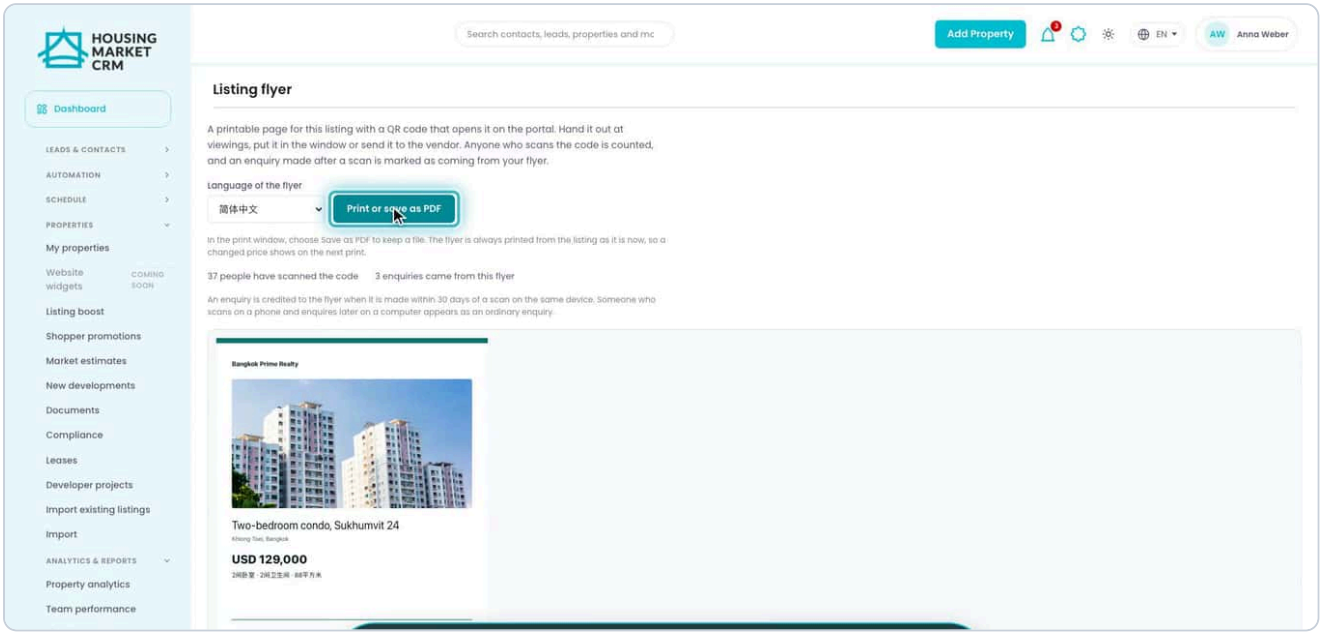


Figure 45.9 · Screen recorded 28 October 2026

10 See how many people **scanned the code** and how many **enquiries came from this flyer**.

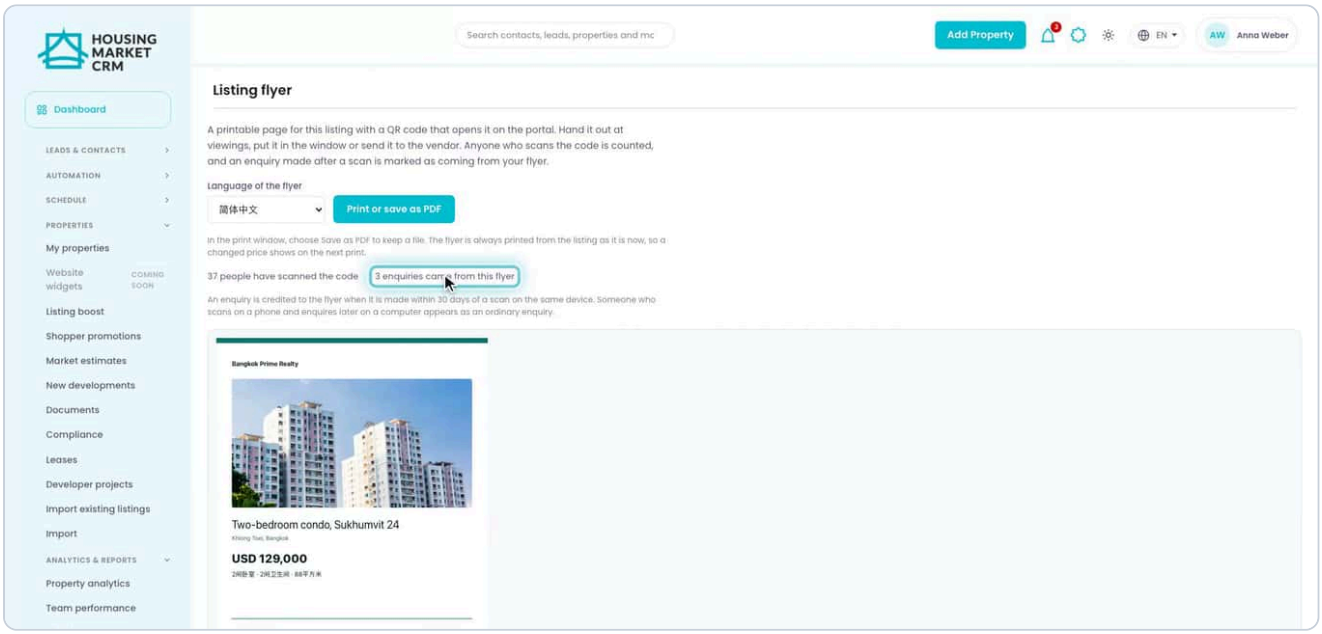


Figure 45.10 · Screen recorded 28 October 2026

11 An enquiry counts when it is made **within 30 days of a scan** on the same device.

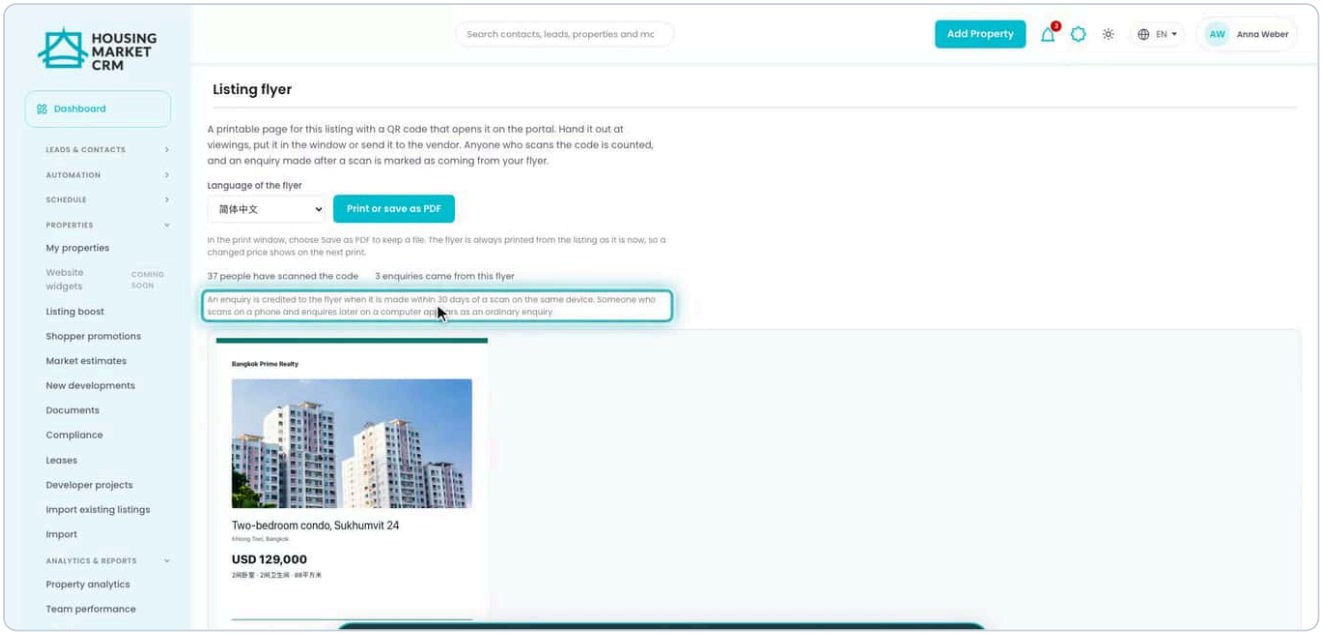


Figure 45.11 · Screen recorded 28 October 2026

12 Free on every plan. A new price shows on the **next print**.

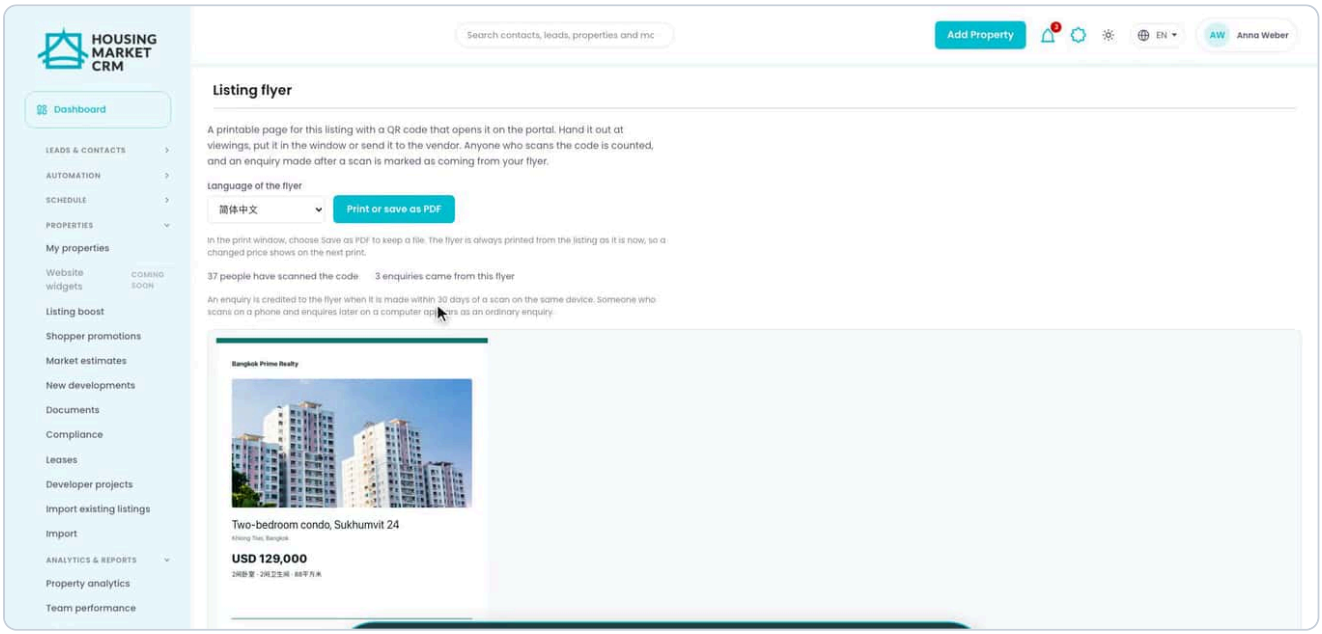


Figure 45.12 · Screen recorded 28 October 2026

46 CHAPTER 46

Virtually stage an empty room

Pro and Business | For agents | Watch the video

TODO No Help Center article covers this task yet, so this chapter has no explanation. Write the article, then map it in packages/handbooks/src/products/crm.ts. (The AI Virtual Staging card on a portal property; every staged image is labelled and the original is kept.)

STEP BY STEP

1. Open a property that is **on the portal**.

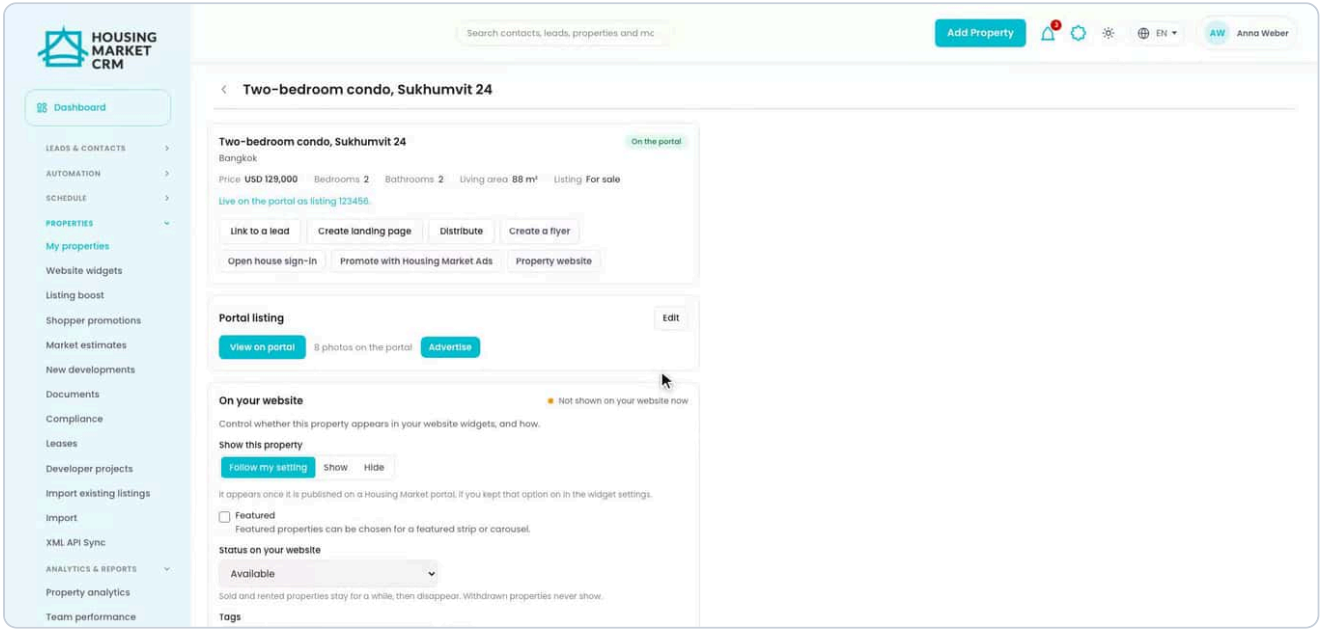


Figure 46.1 · Screen recorded 1 November 2026

2 On the property, find the **AI Virtual Staging** card.

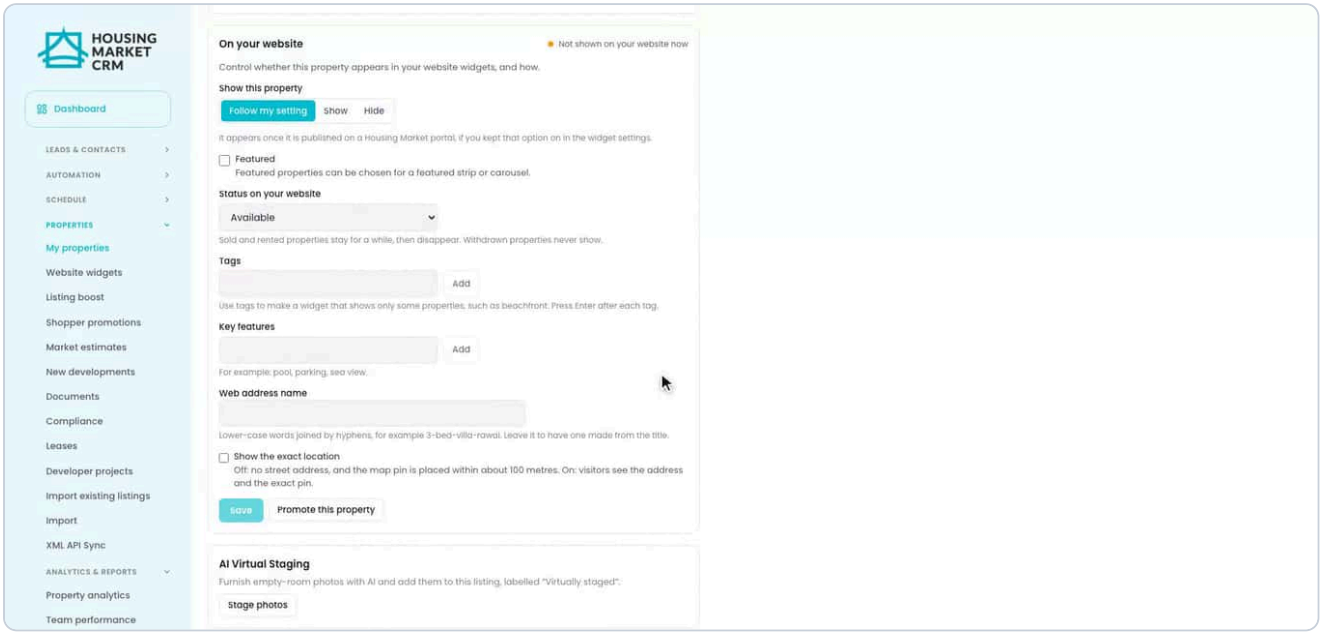


Figure 46.2 · Screen recorded 1 November 2026

3 Click **Stage photos**.

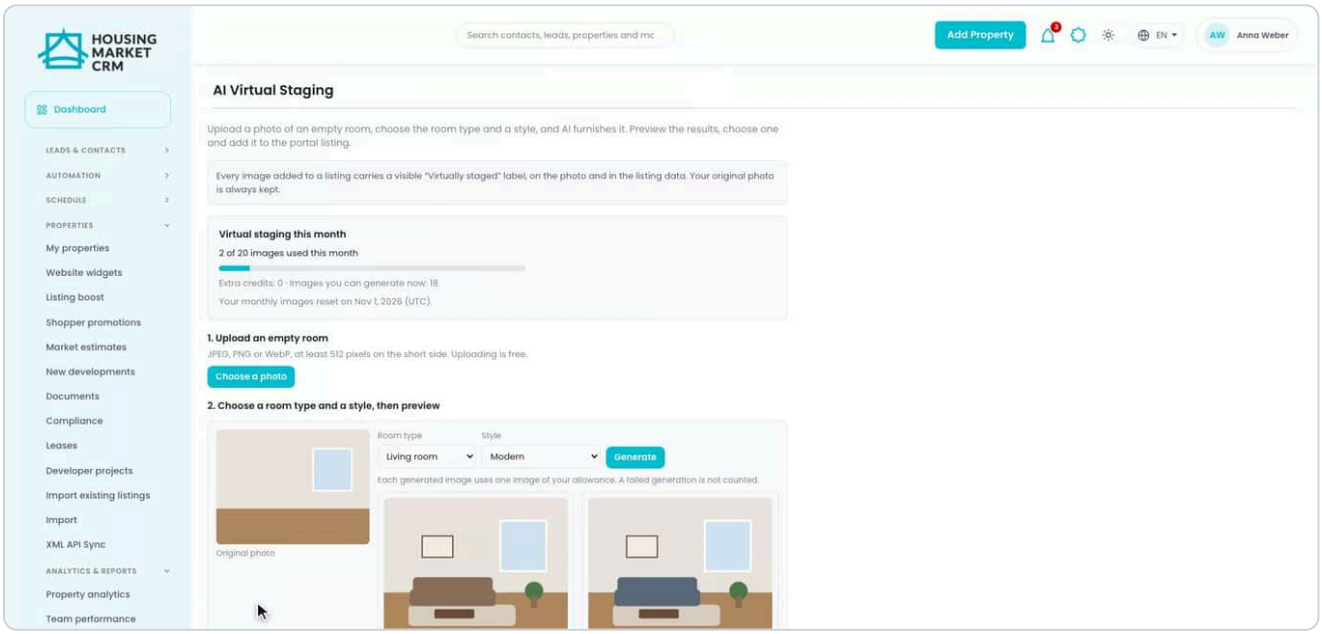


Figure 46.3 · Screen recorded 1 November 2026

4 Every staged image is **labelled**. Your original is **kept**.

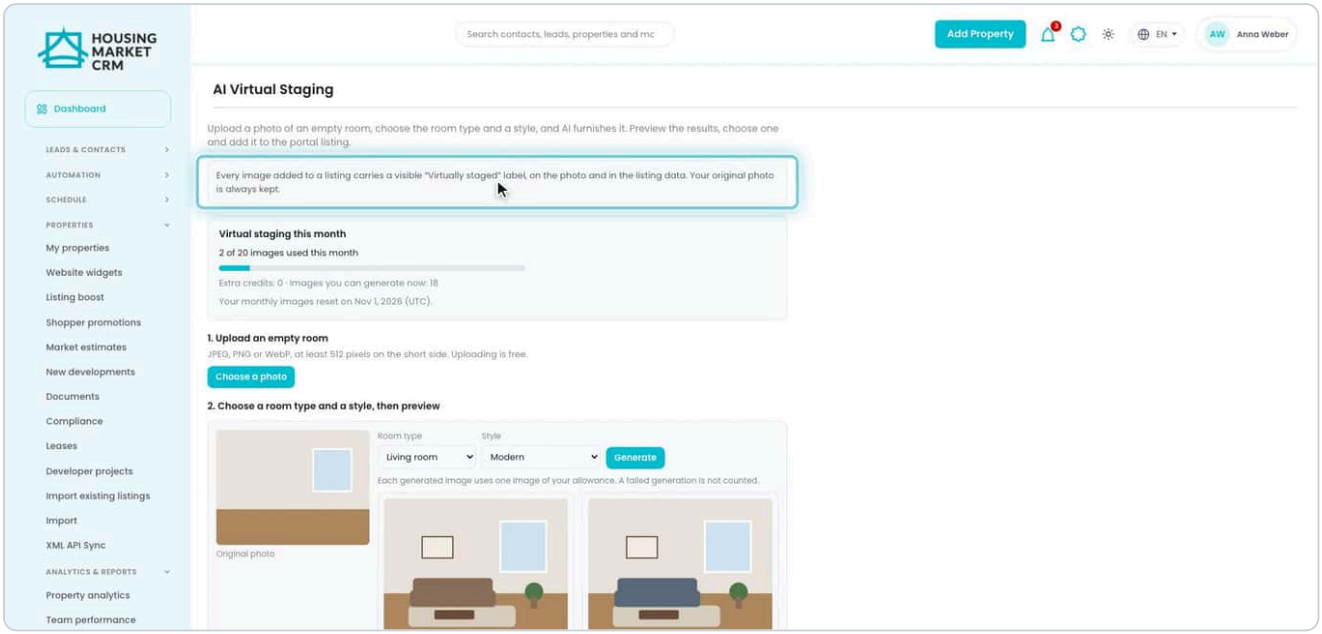


Figure 46.4 · Screen recorded 1 November 2026

5 **Choose a photo** of an empty room. Uploading is free.

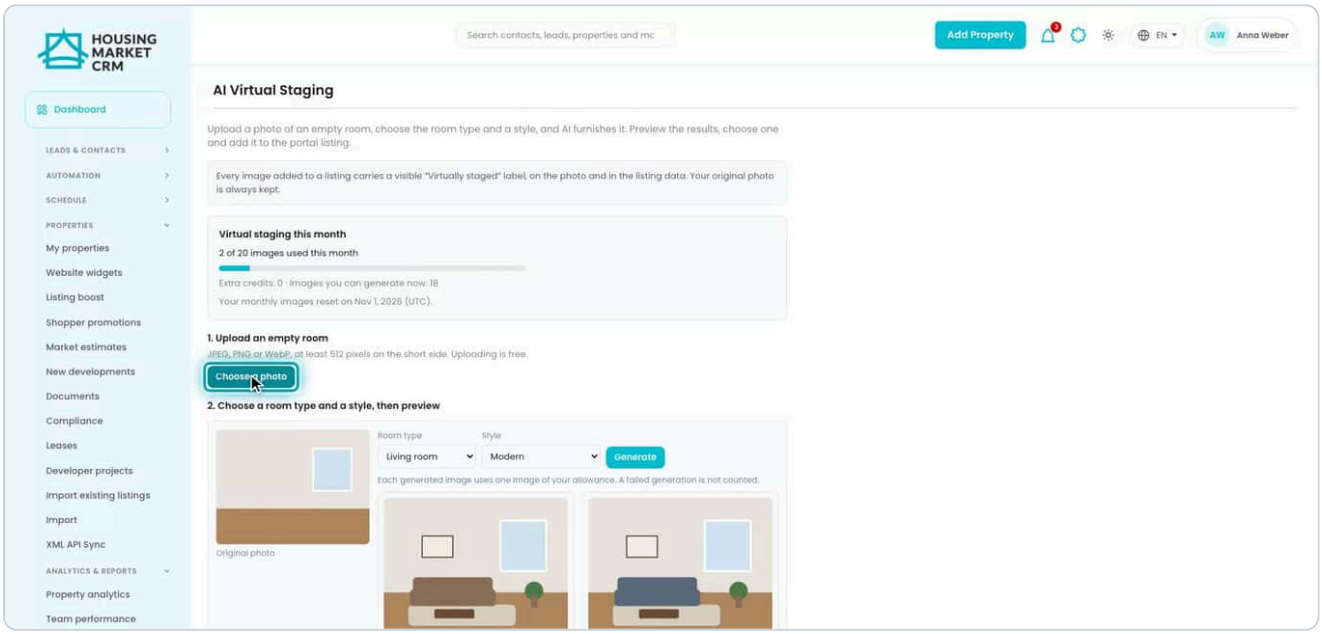


Figure 46.5 · Screen recorded 1 November 2026

6 Pick the **room type** and a **style**.

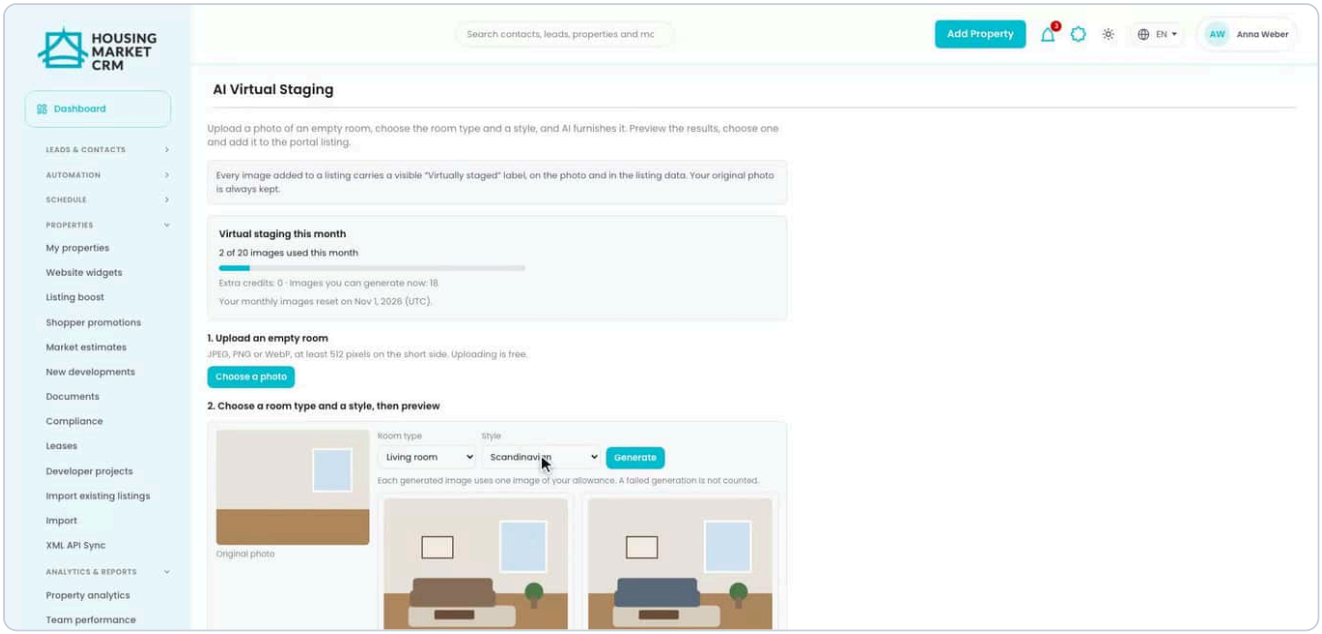


Figure 46.6 · Screen recorded 1 November 2026

7 Click **Generate**.

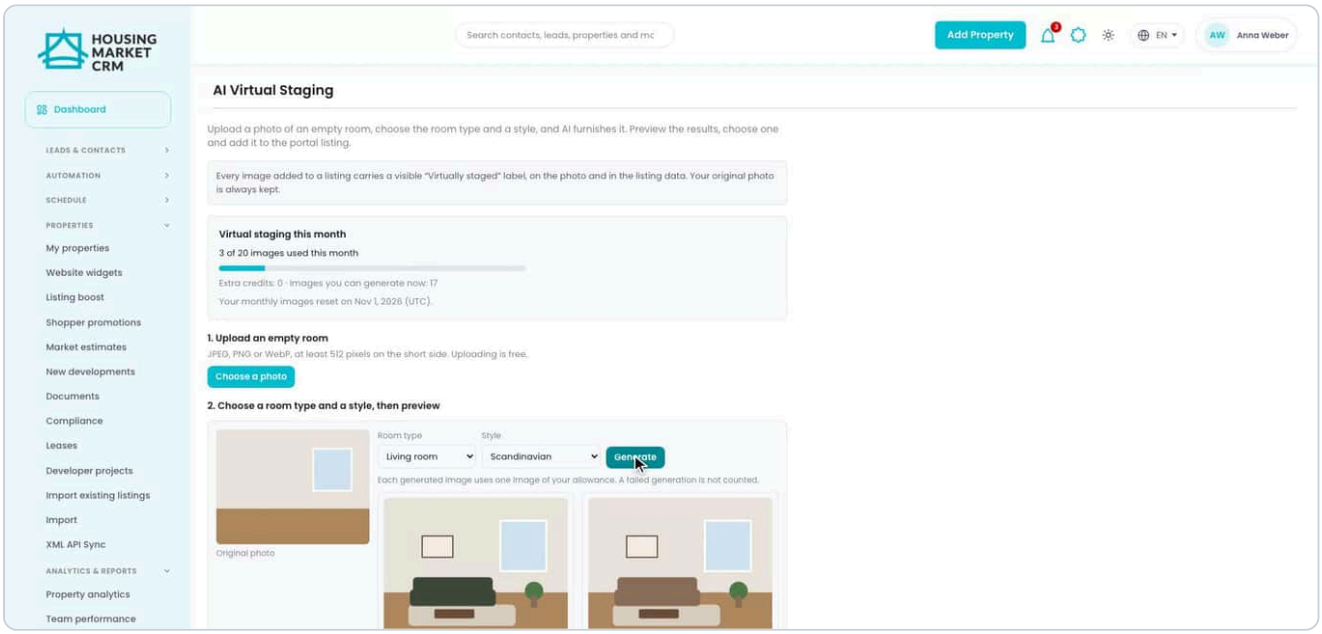


Figure 46.7 · Screen recorded 1 November 2026

8 Click **Add to listing**.

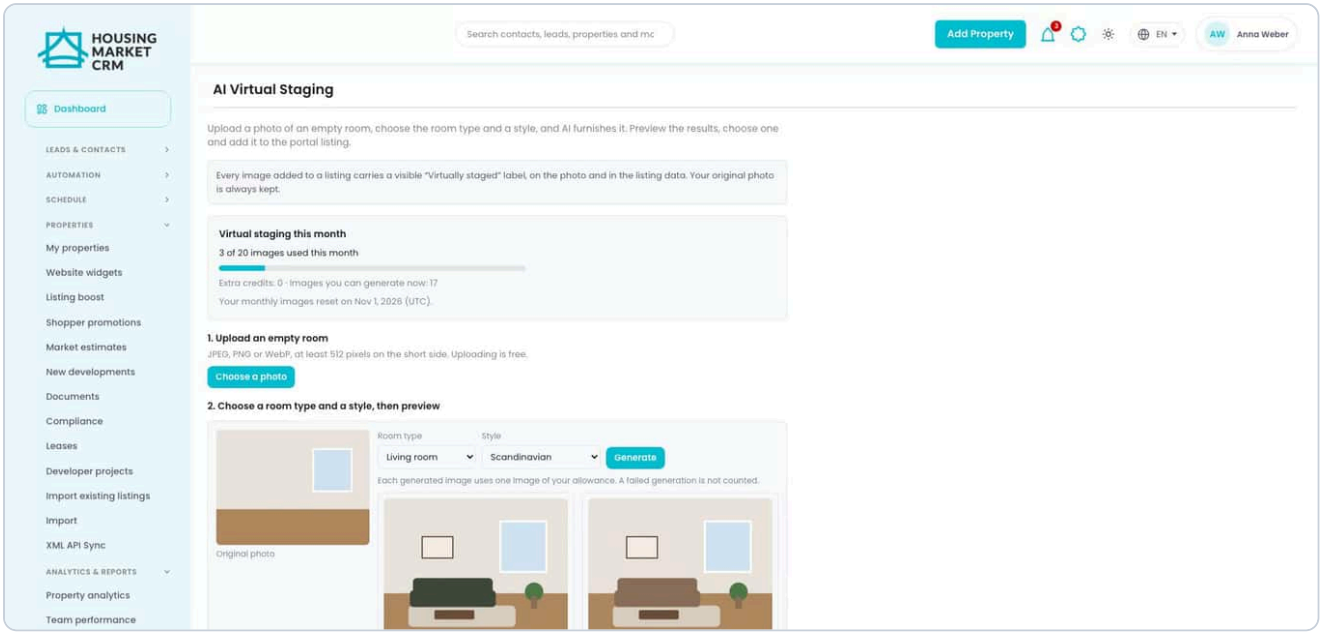


Figure 46.8 · Screen recorded 1 November 2026

9 Added as the next photo, labelled **Virtually staged**.

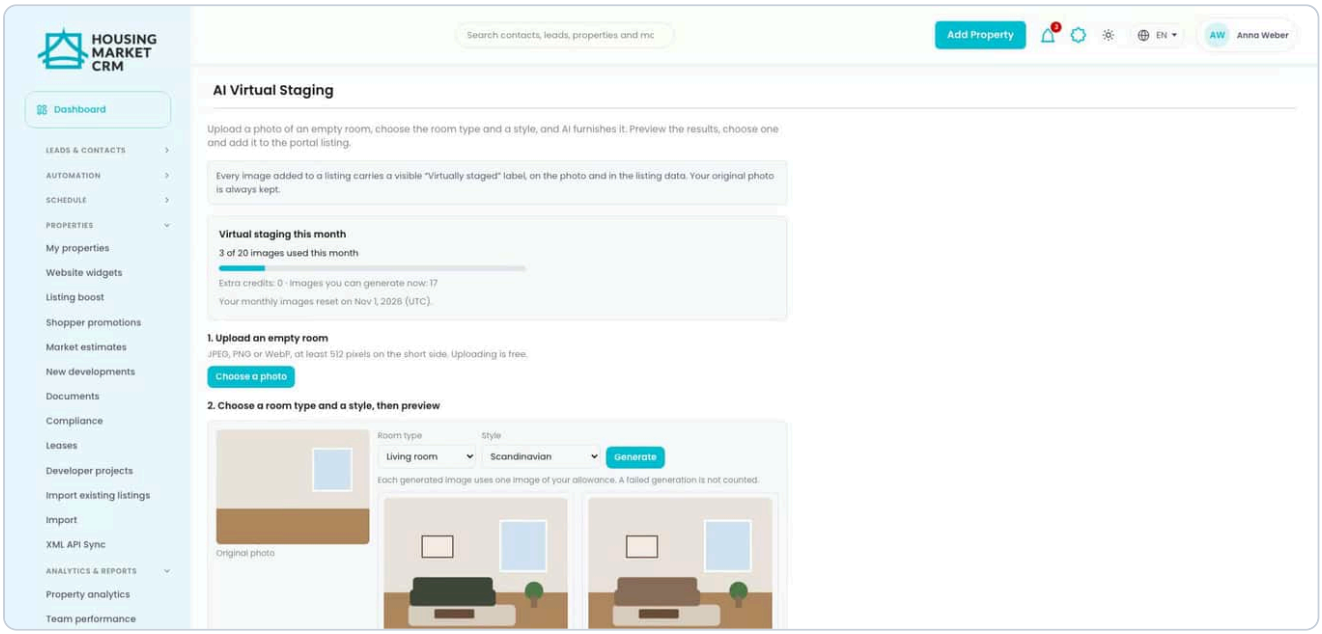


Figure 46.9 · Screen recorded 1 November 2026

RELATED HELP CENTER ARTICLES

Can I manage my property listings? faq.housingmarketgroup.com/faq/can-i-manage-my-property-listings

47 CHAPTER 47

Virtual staging allowance and credit packs

Pro and Business | For agents | Watch the video

TODO No Help Center article covers this task yet, so this chapter has no explanation. Write the article, then map it in packages/handbooks/src/products/crm.ts. (The monthly allowance resets on the first of the month; amounts are stated in the product and facts.ts, not here.)

STEP BY STEP

1 Open AI Virtual Staging.

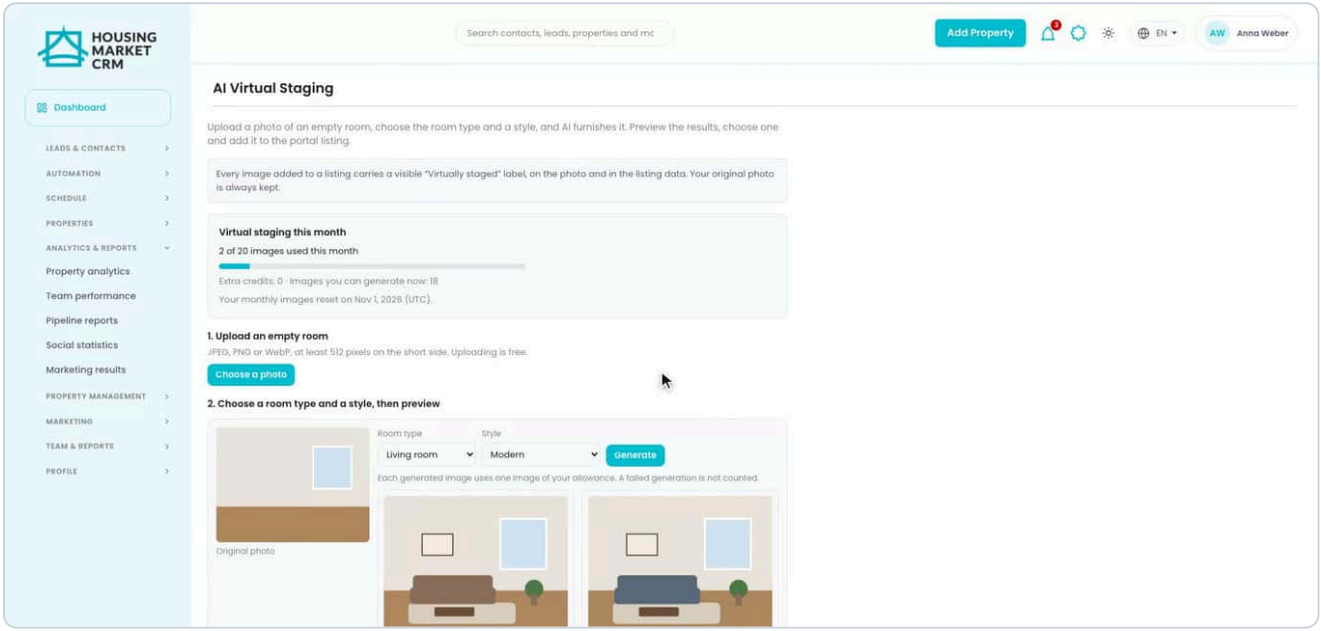


Figure 47.1 · Screen recorded 1 November 2026

2 What you have **used** this month.

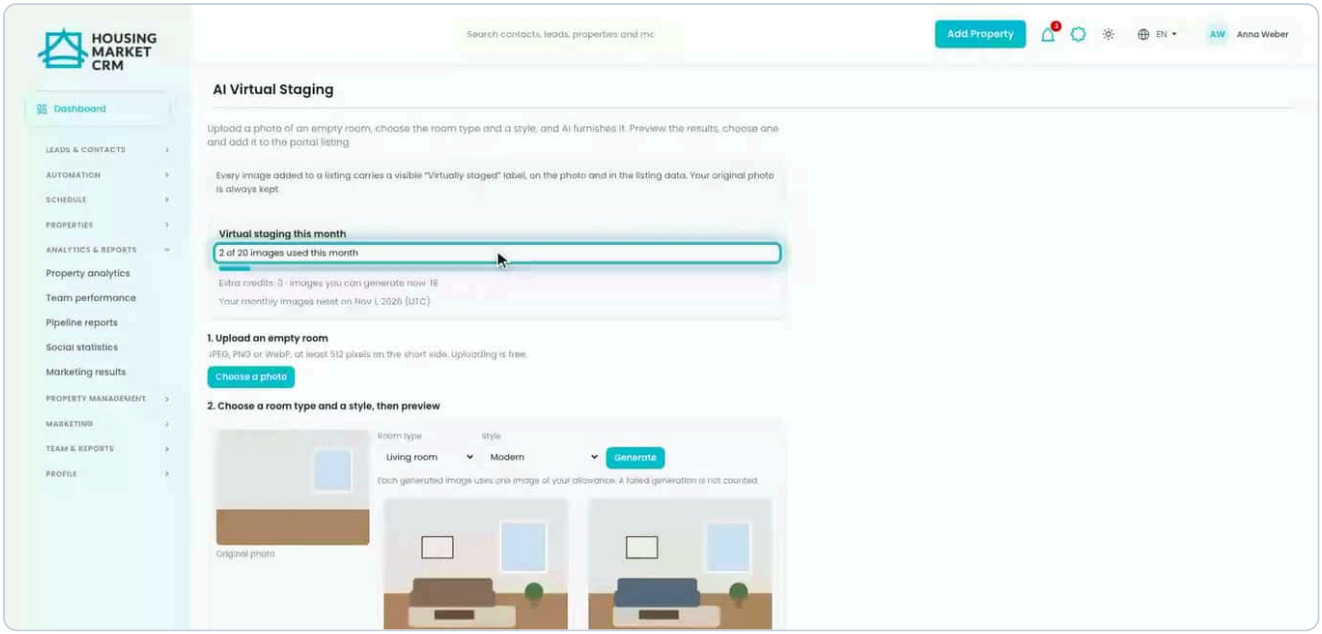


Figure 47.2 · Screen recorded 1 November 2026

3 It **resets** on the first of the month.

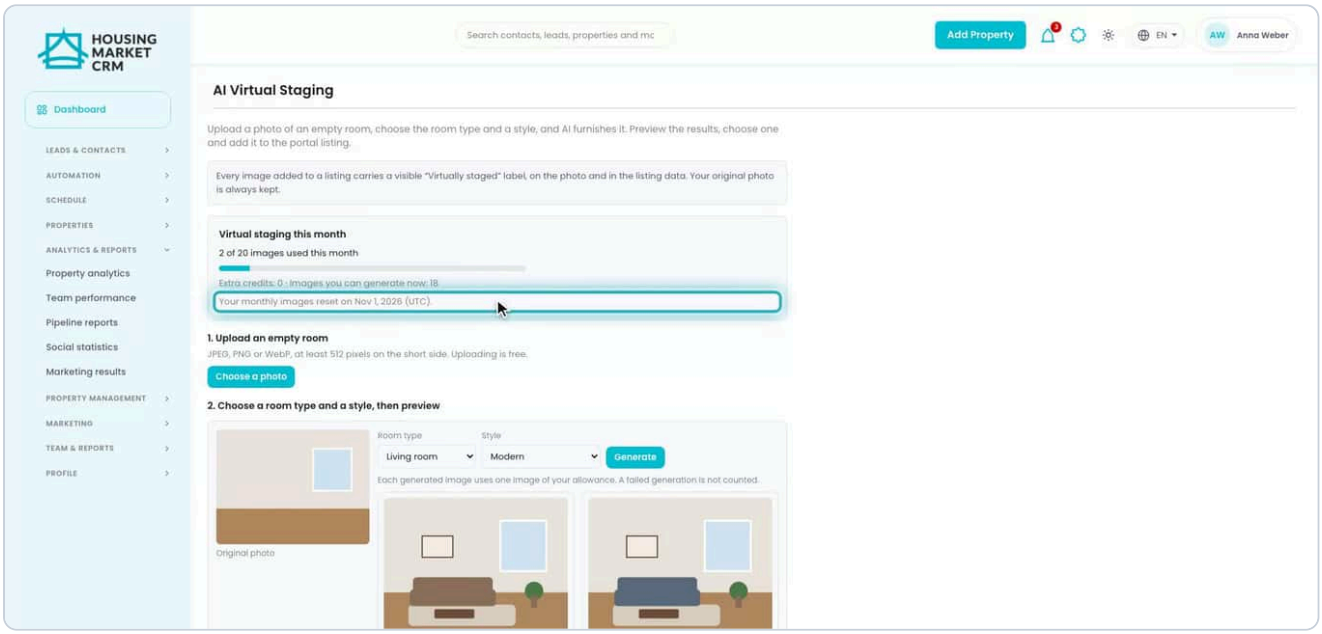


Figure 47.3 · Screen recorded 1 November 2026

4 **Pro** includes 20 images a month. **Business** includes 100.

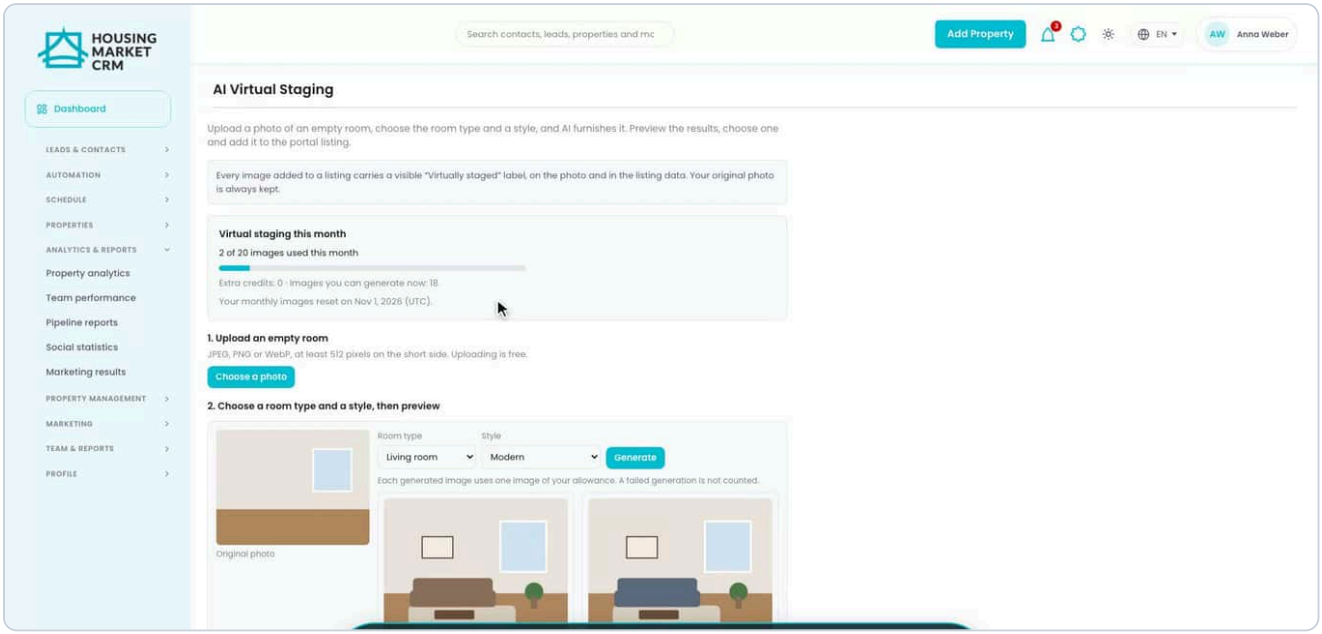


Figure 47.4 · Screen recorded 1 November 2026

5 A **credit pack**: 25 images for **19 USD**, charged once.

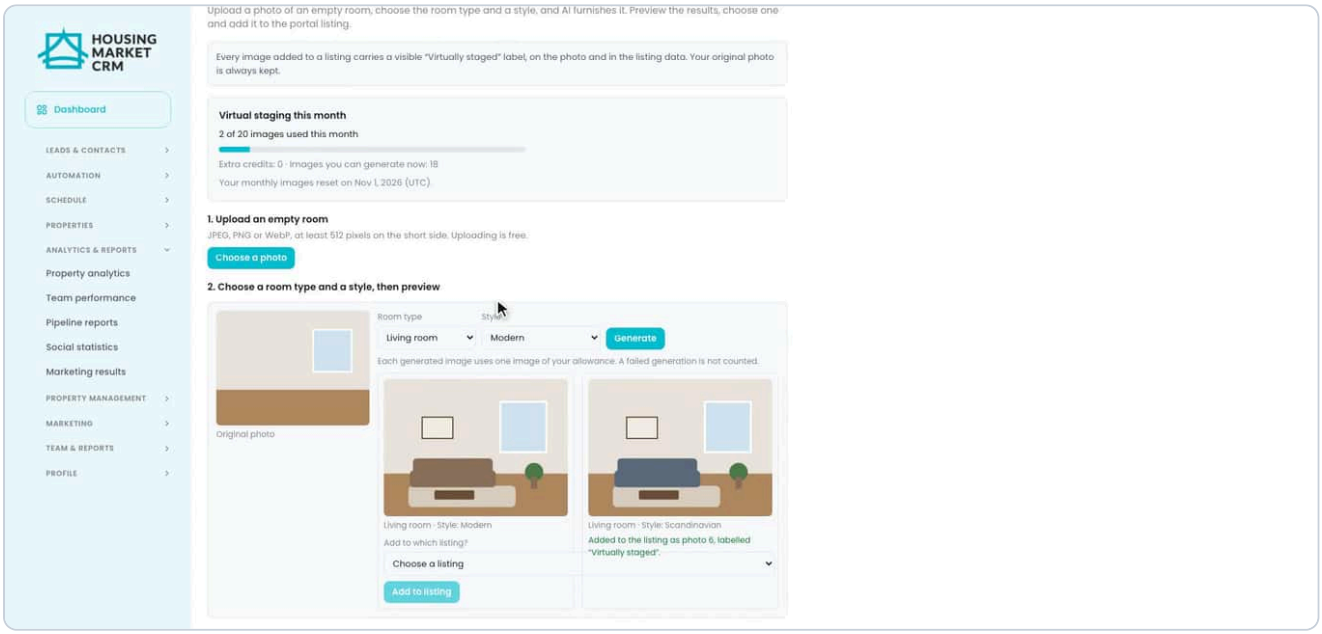


Figure 47.5 · Screen recorded 1 November 2026

6 Pack credits **never expire**. They are used after your allowance.

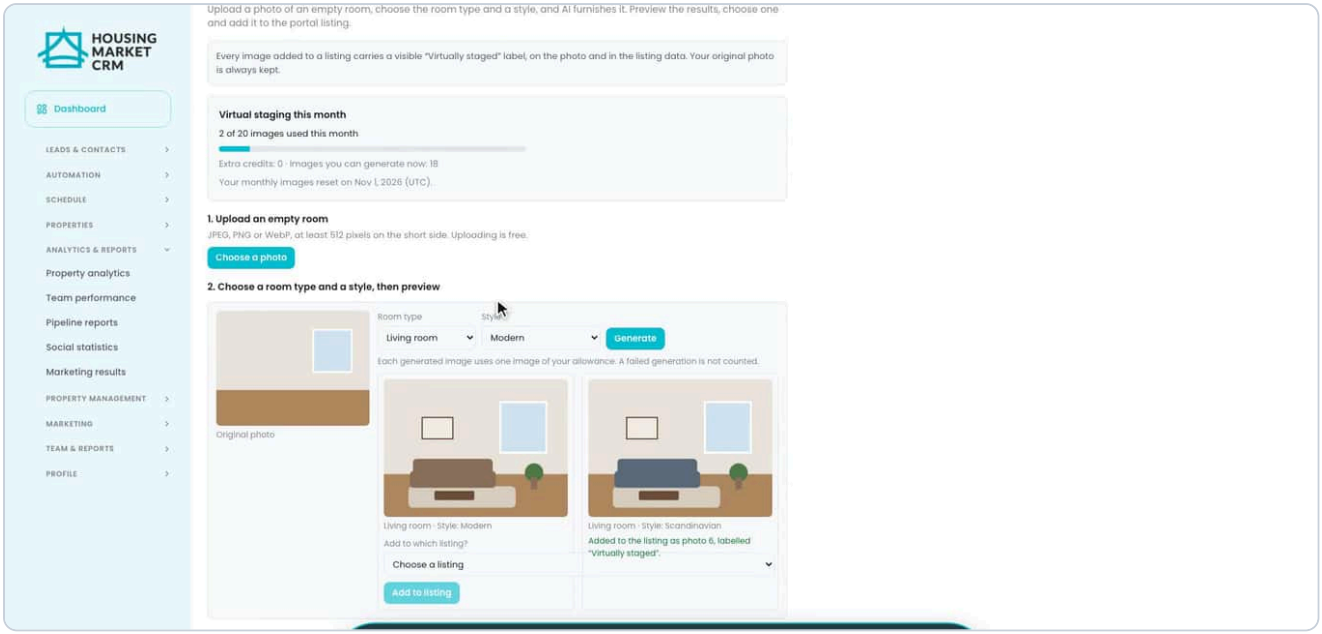


Figure 47.6 · Screen recorded 1 November 2026

RELATED HELP CENTER ARTICLES

Can I manage my property listings?	faq.housingmarketgroup.com/faq/can-i-manage-my-property-listings

48 CHAPTER 48

Import existing listings: file, feed or website

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

Open Import existing listings and pick a spreadsheet, a feed, or your own website (beta). You review the listings first, and they land in My Properties.

In Housing Market CRM, open Import existing listings in the Properties menu. Pick where your listings are now, check what the CRM found, and confirm. You choose from three sources:

- A spreadsheet: a CSV, TSV or XLSX file. Column headings are recognised in several languages and you confirm which column is which. You can download a template. A one-time import from a file is free on every plan.
- A feed: Kyero, Property Finder, Bayut or Dubizzle, a RESO Web API, Zoopla, schema.org JSON-LD, RSS or GeoRSS, or a generic JSON or XML feed. Reading a feed once is free on every plan. Keeping a feed in sync automatically every day is a paid feature, and a sync never deletes anything.
- Your own website, the website crawl (beta, Business plan): it reads the listings from a website you have proved is yours. It obeys robots.txt, reads slowly and stops if your website refuses.

You review everything before it is imported. Imported properties land in My Properties as CRM-only: they are not published on a portal unless you choose to publish them and your plan allows it. Photos are copied across, importing again updates a property instead of duplicating it, and nothing is ever deleted.

From the Help Center: **How do I import my listings into Housing Market CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

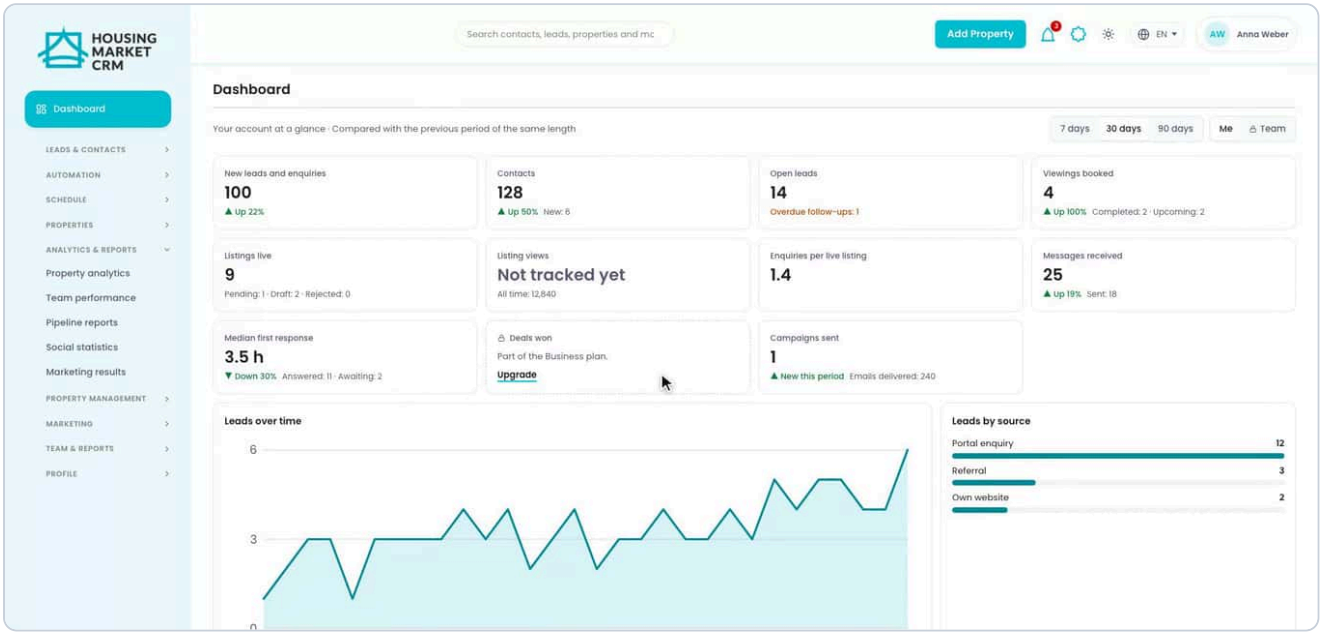


Figure 48.1 · Screen recorded 4 November 2026

2 Open **Properties** in the left menu.

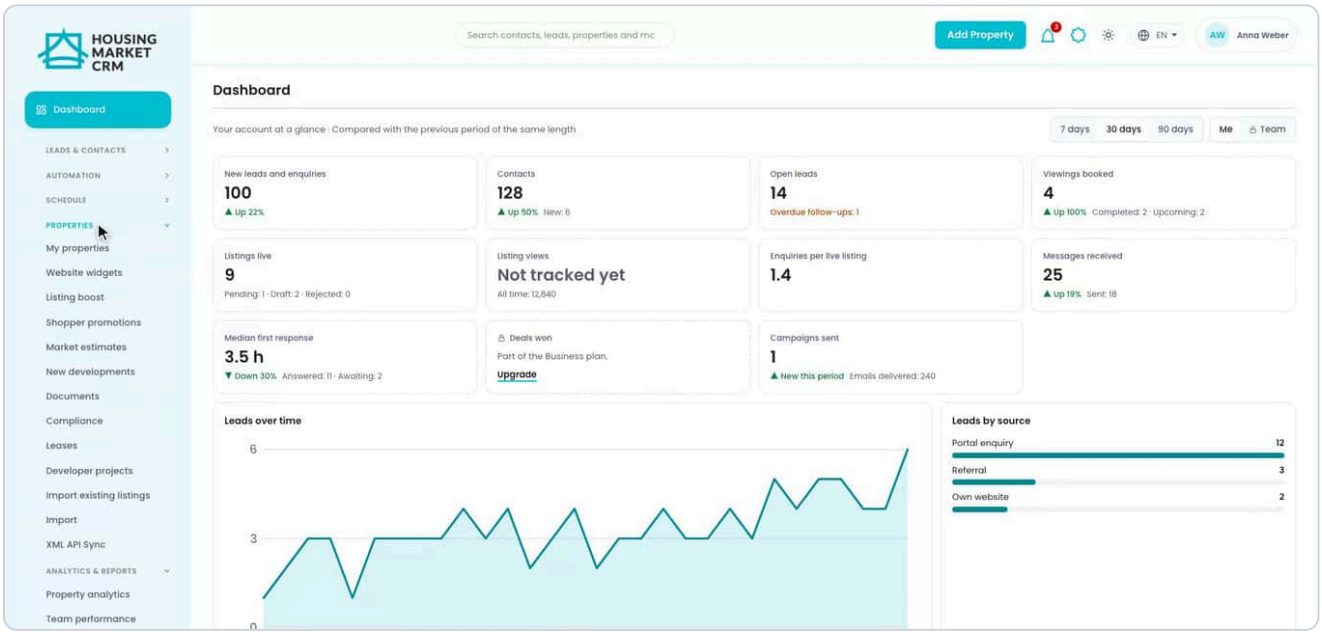


Figure 48.2 · Screen recorded 4 November 2026

3 Click **My properties**.

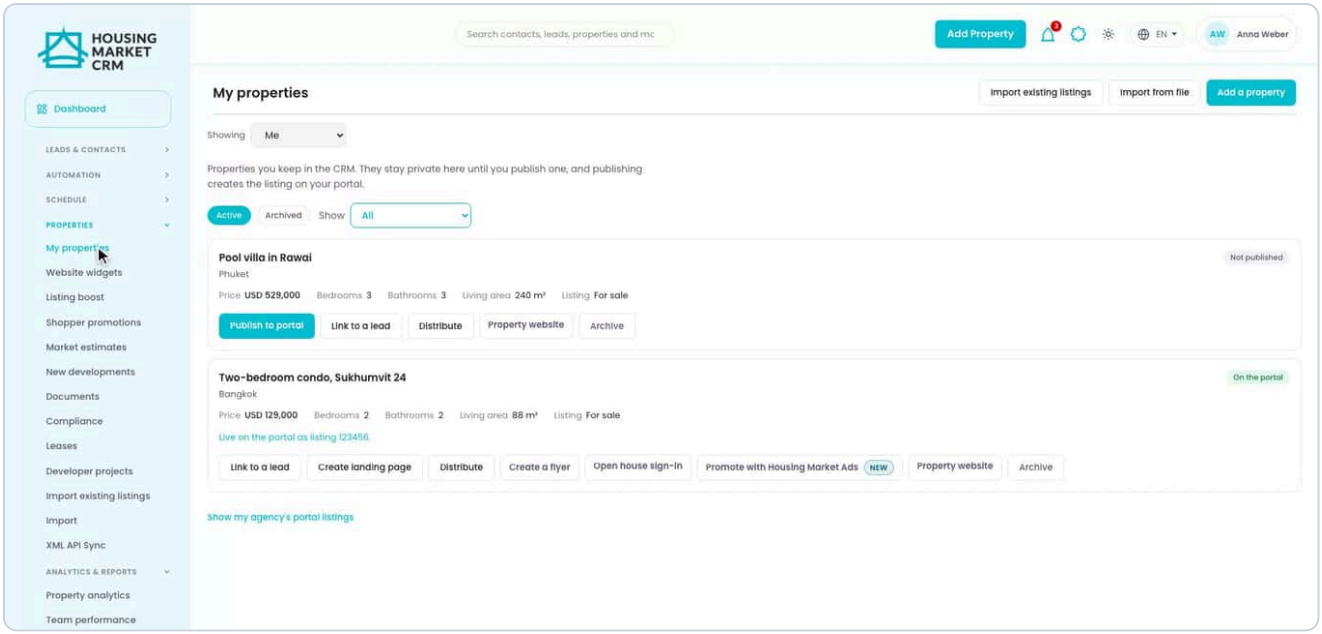


Figure 48.3 · Screen recorded 4 November 2026

4 Click **Import existing listings**.

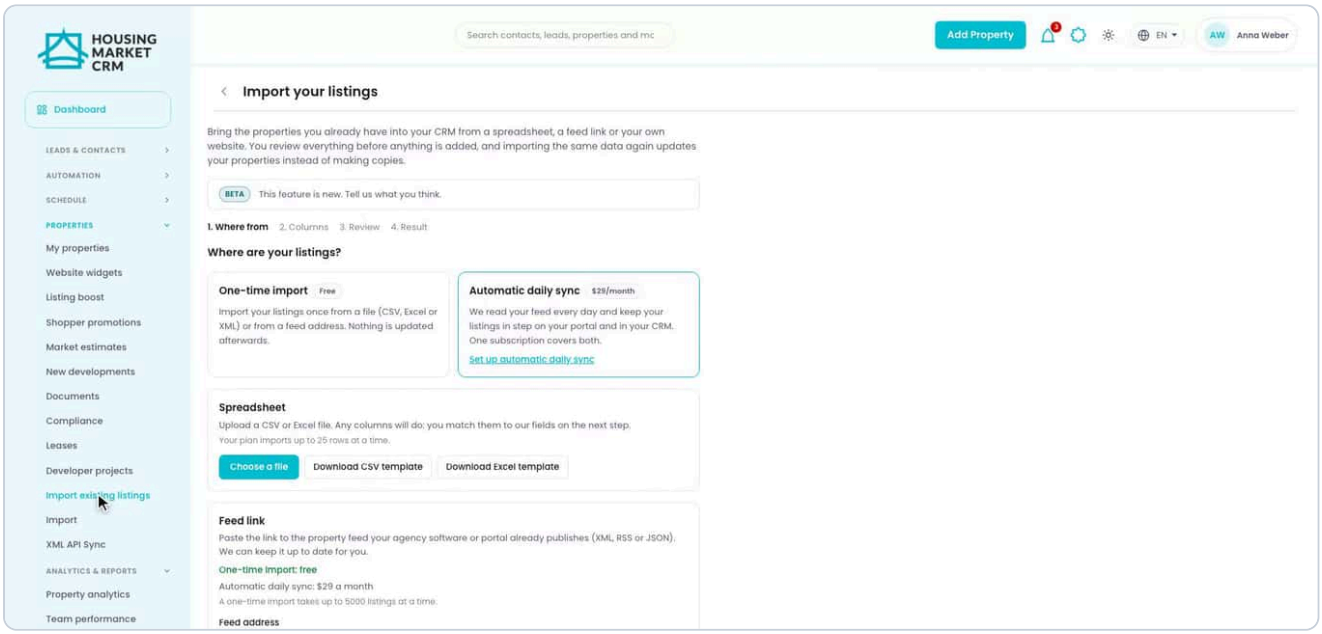


Figure 48.4 · Screen recorded 4 November 2026

5 A **spreadsheet**: upload a CSV or Excel file and match your columns.

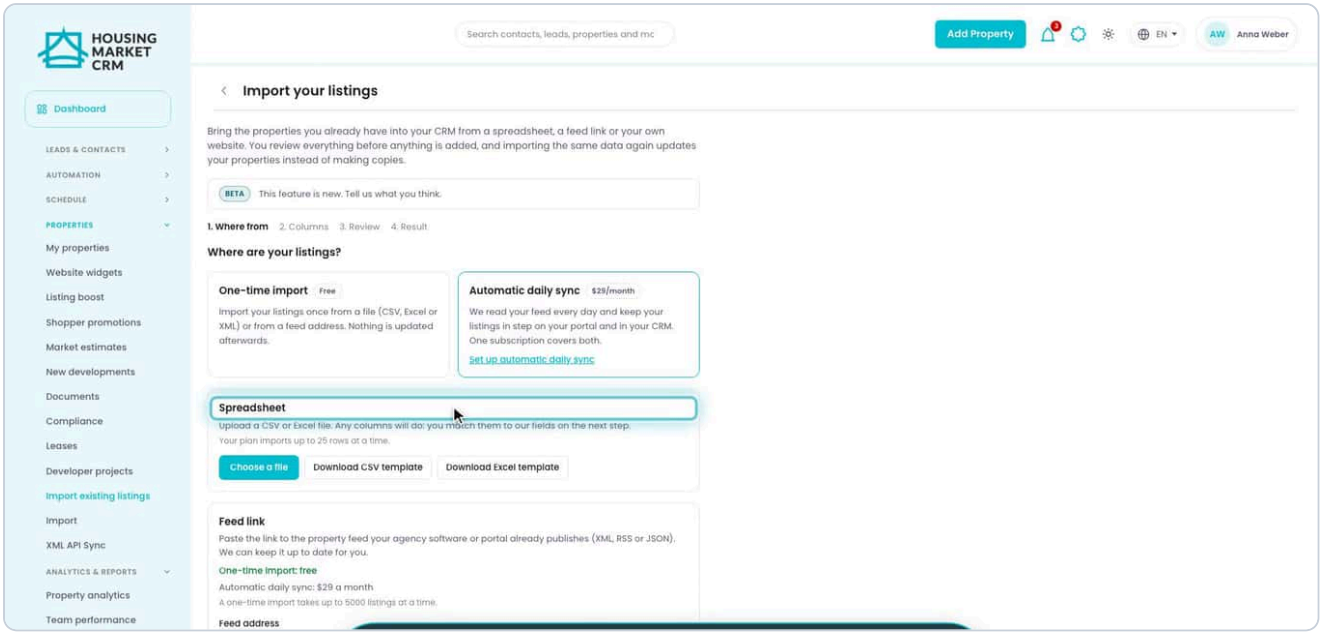


Figure 48.5 · Screen recorded 4 November 2026

6 A **feed link**: the property feed your agency software already publishes.

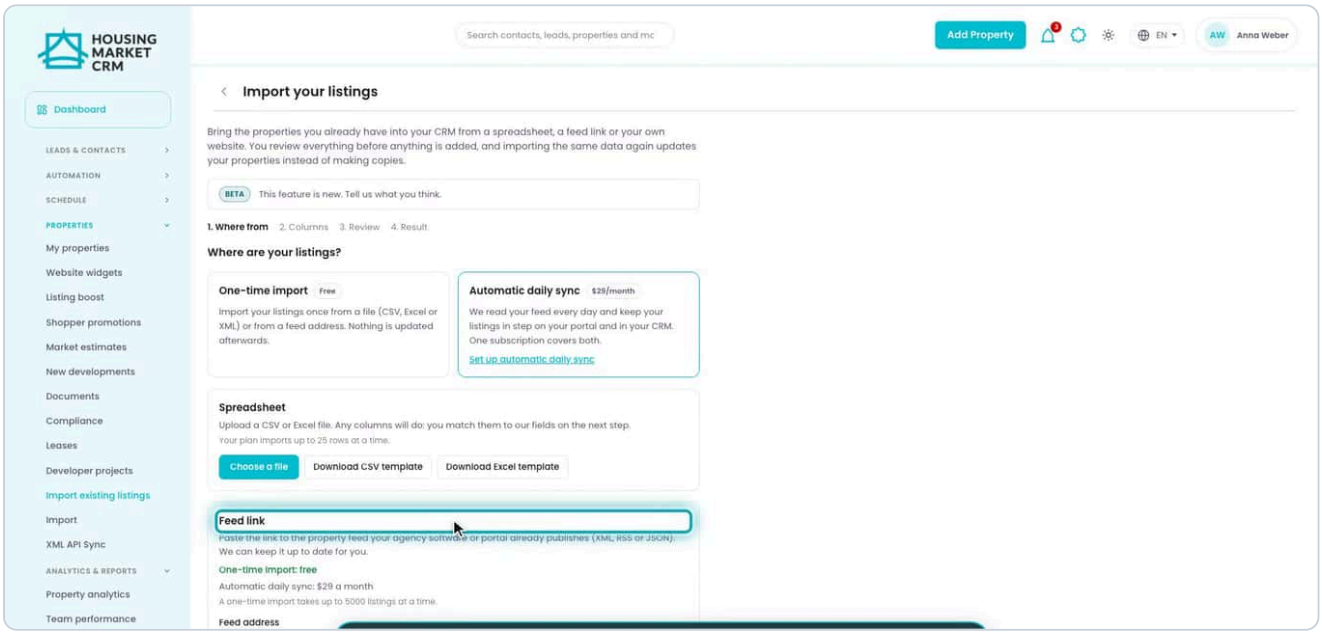


Figure 48.6 · Screen recorded 4 November 2026

7 Reading a feed **once is free**.

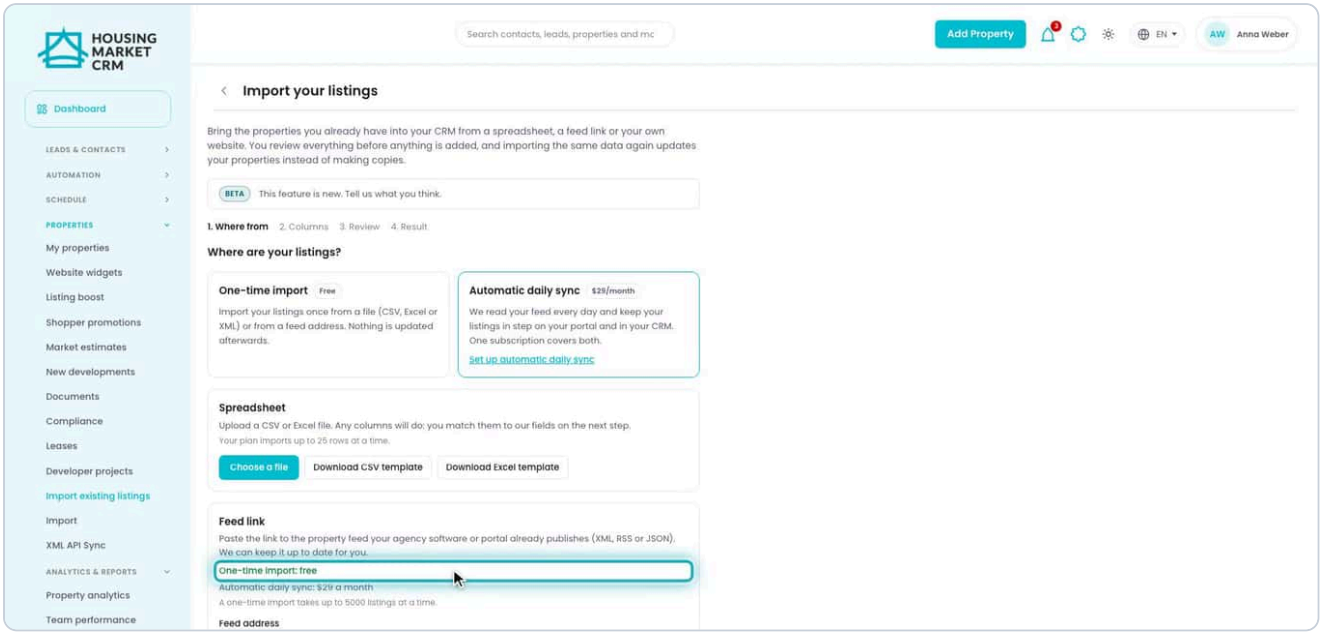


Figure 48.7 · Screen recorded 4 November 2026

8 **My website** reads your own site.

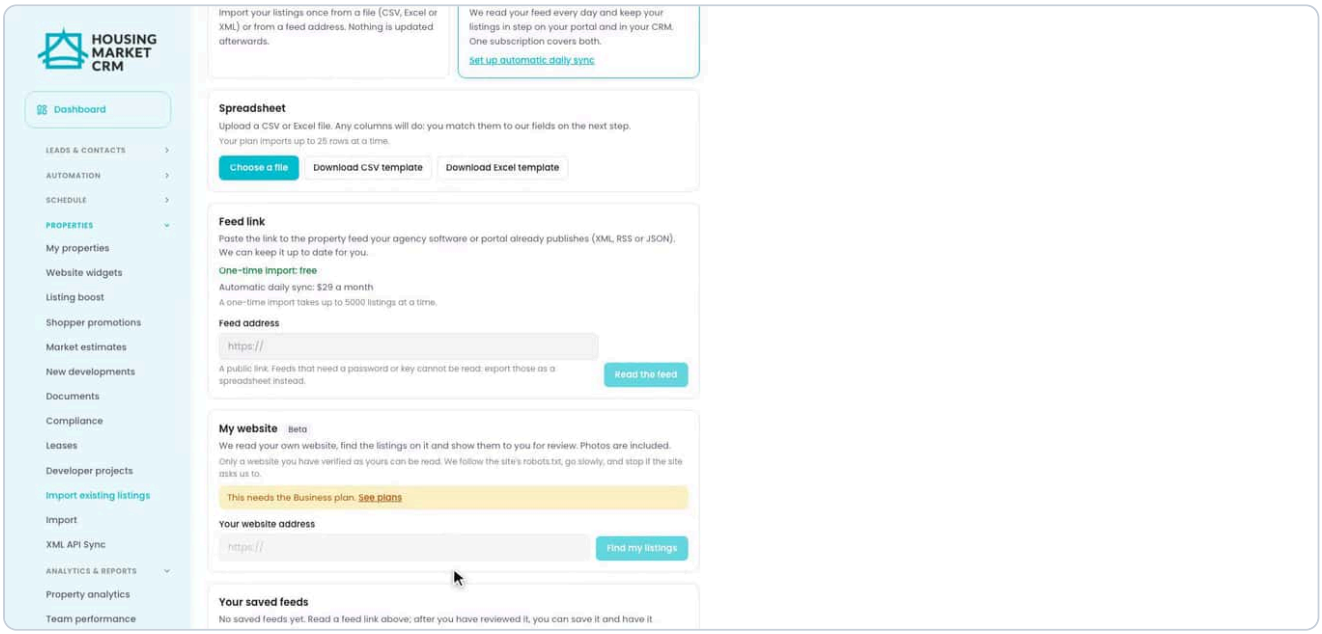


Figure 48.8 · Screen recorded 4 November 2026

9 It needs the **Business plan**, and a locked way **says so**.

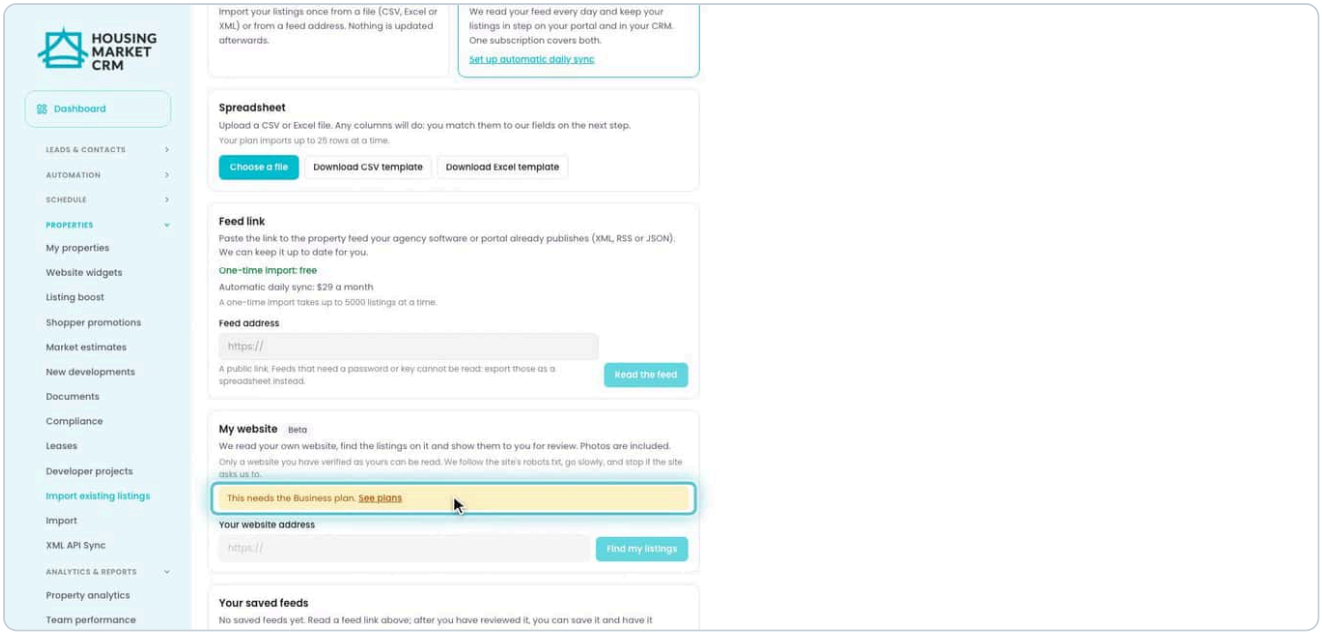


Figure 48.9 · Screen recorded 4 November 2026

10 Back to **Feed link**.

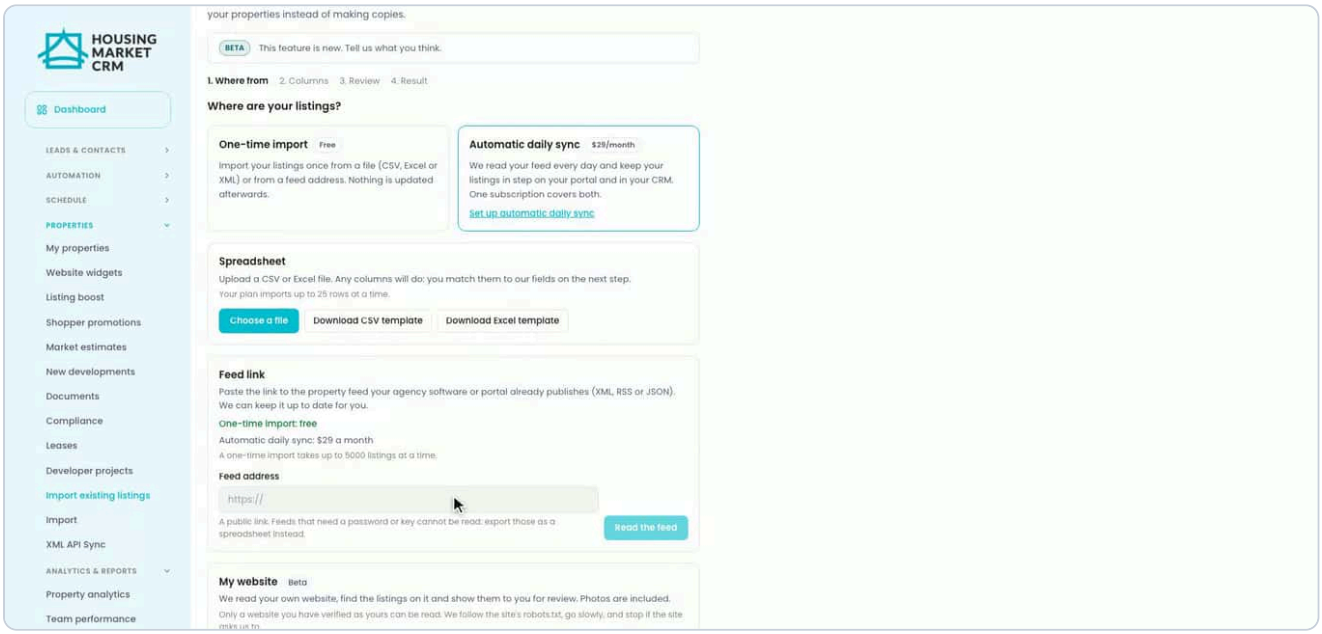


Figure 48.10 · Screen recorded 4 November 2026

11 Paste the **feed address**.

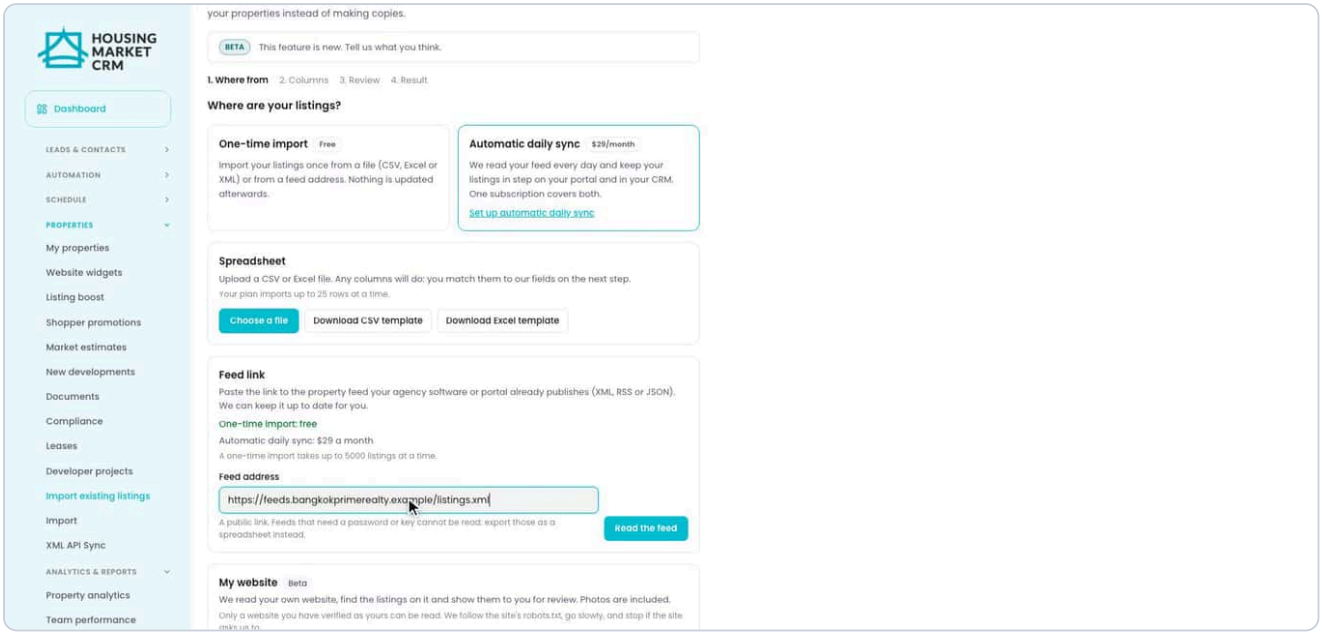


Figure 48.11 · Screen recorded 4 November 2026

12 Click **Read the feed**.

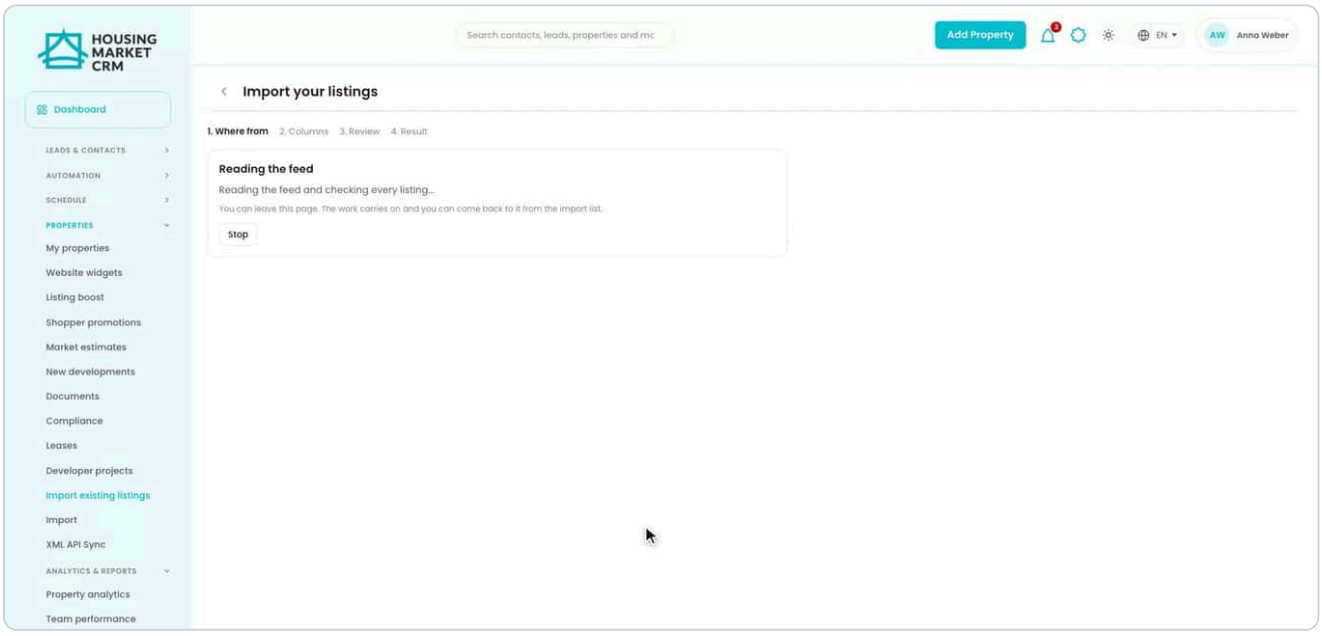


Figure 48.12 · Screen recorded 4 November 2026

13 The CRM reads the feed. You can **leave this page**: the work carries on.

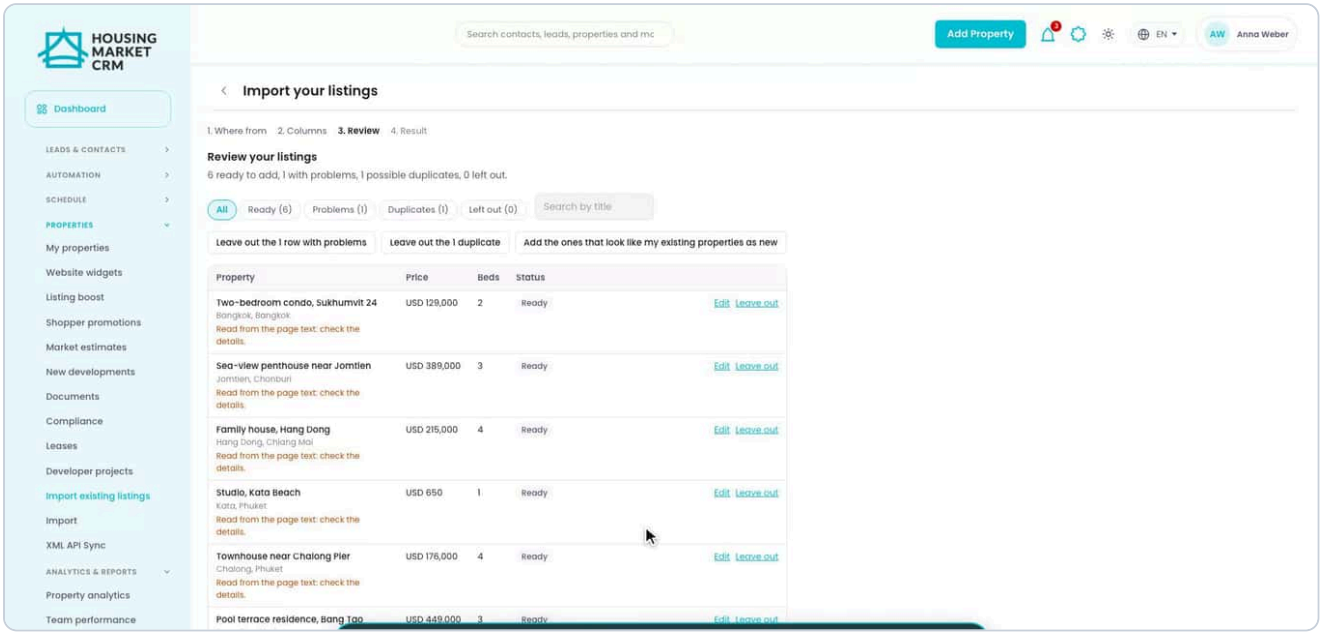


Figure 48.13 · Screen recorded 4 November 2026

14 Nothing is added yet. Here is **what was found**.

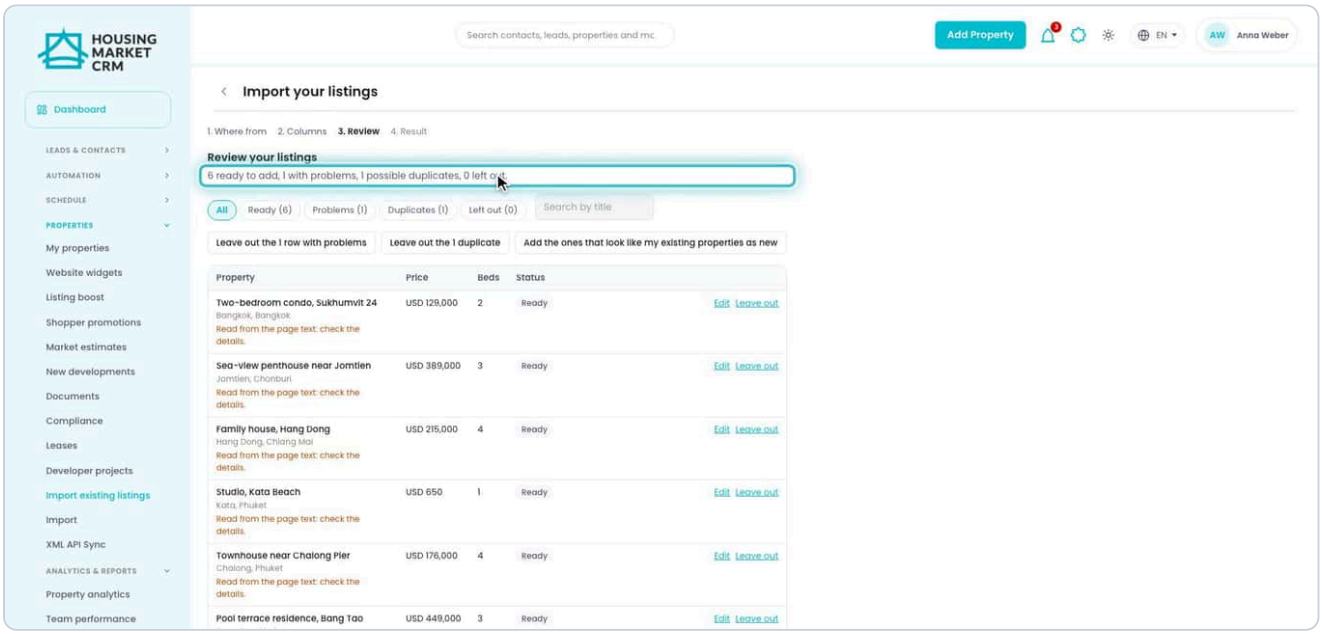


Figure 48.14 · Screen recorded 4 November 2026

15 Each listing shows its **price**, **bedrooms** and **status**.

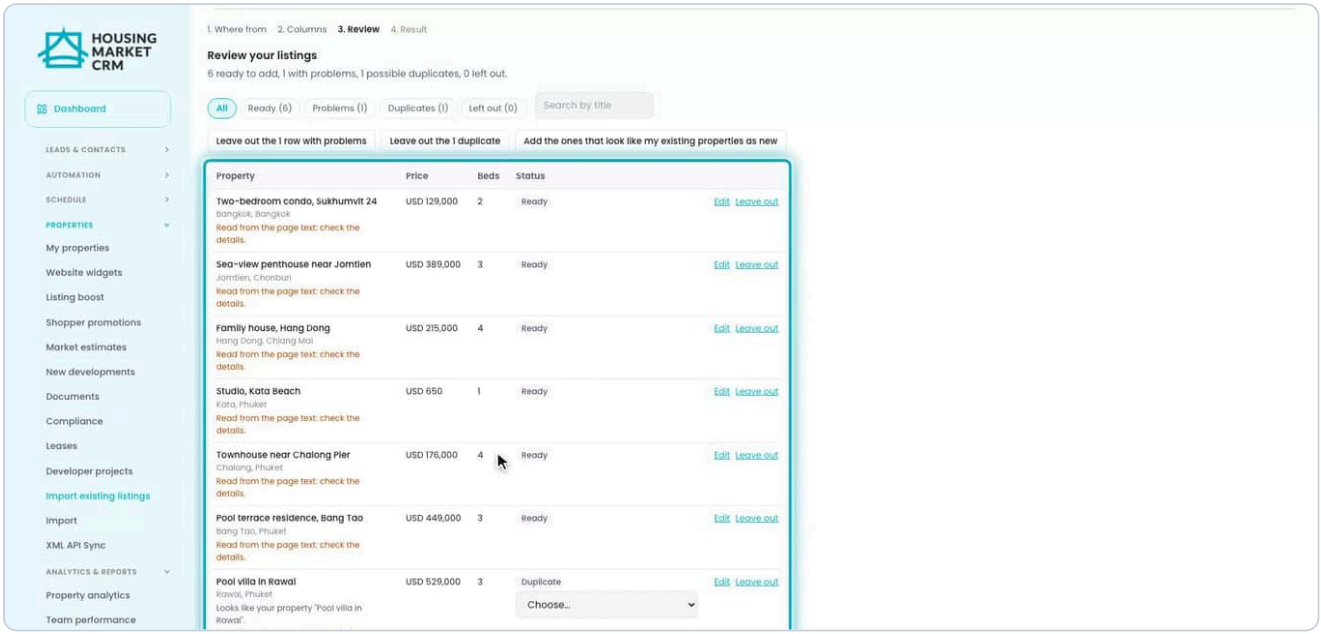


Figure 48.15 · Screen recorded 4 November 2026

16 Filter to the **possible duplicates**.

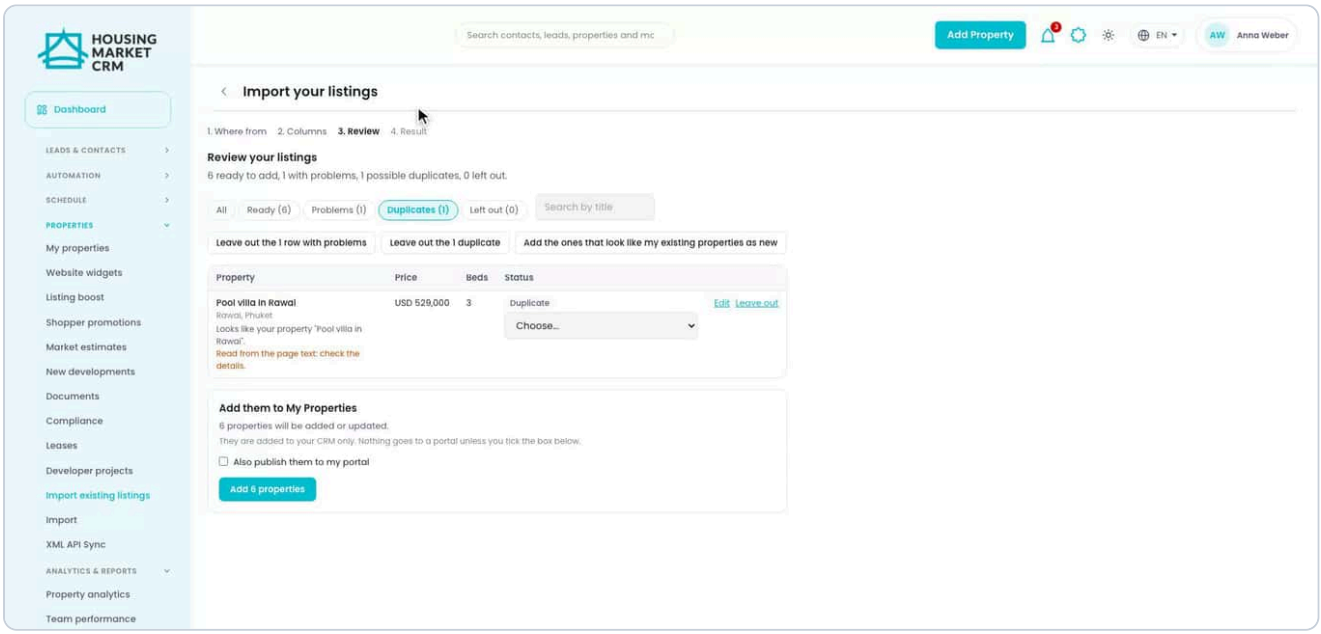


Figure 48.16 · Screen recorded 4 November 2026

17 This one **looks like a property you already have**.

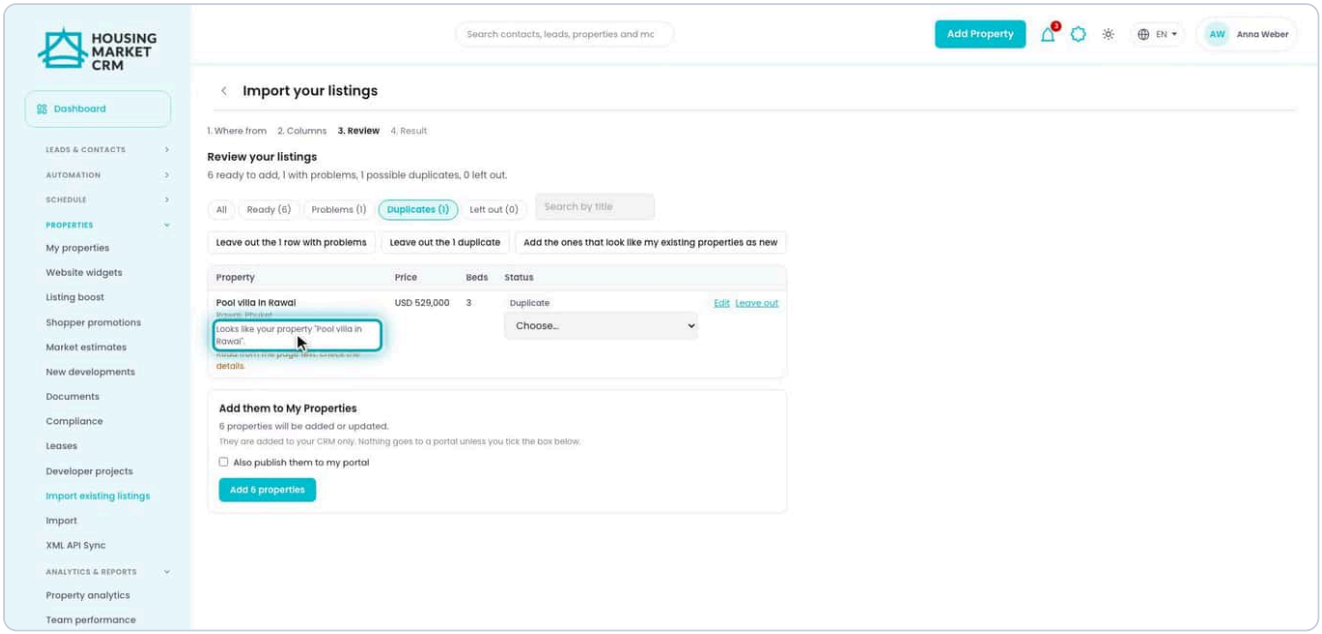


Figure 48.17 · Screen recorded 4 November 2026

18 And the **problems**.

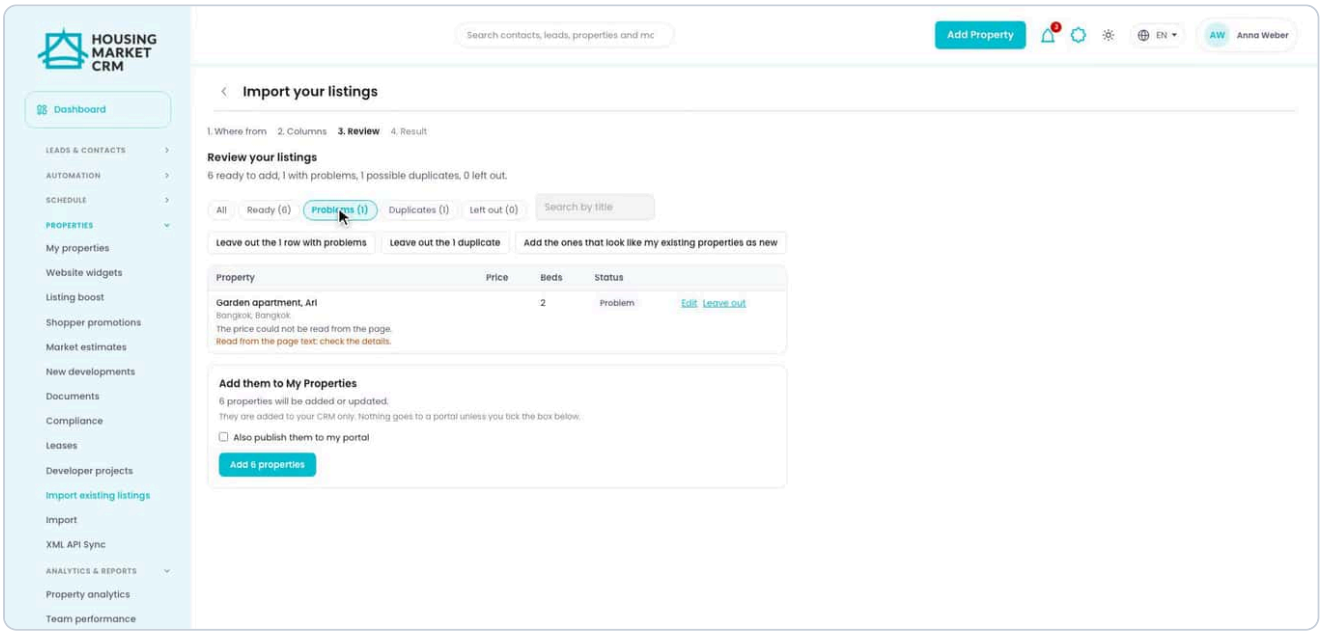


Figure 48.18 · Screen recorded 4 November 2026

19 The price on this one could not be read.

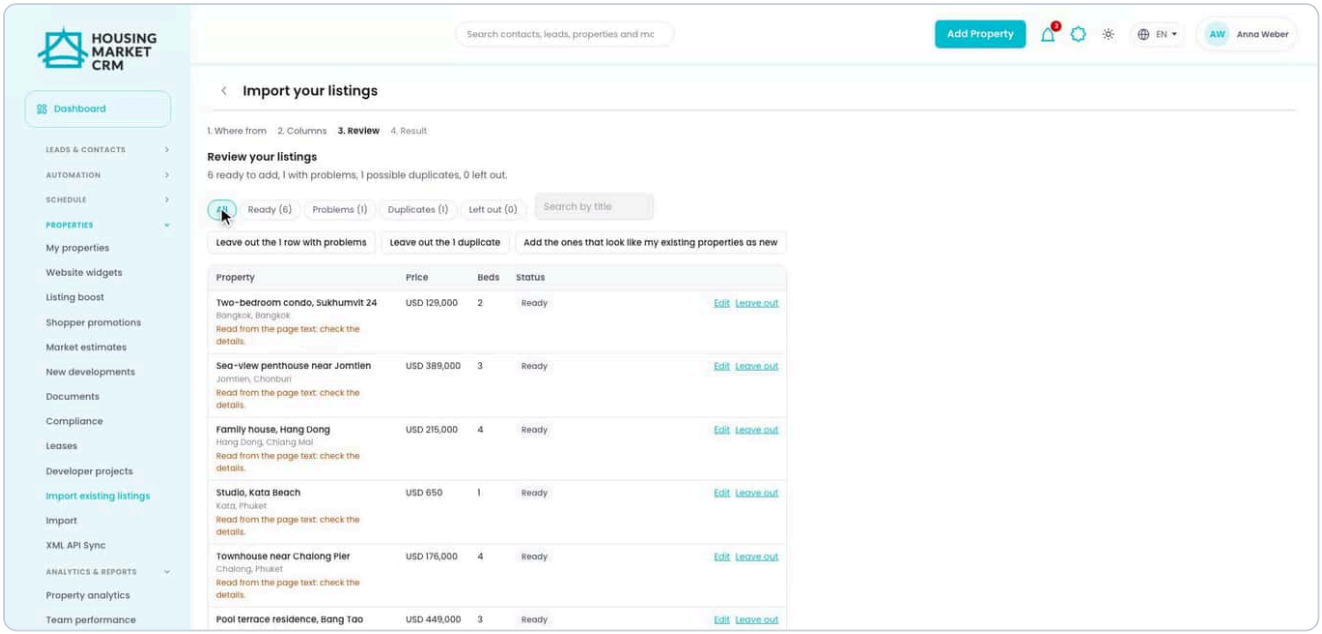


Figure 48.19 · Screen recorded 4 November 2026

20 Leave out the **duplicate** and the row with **problems**.

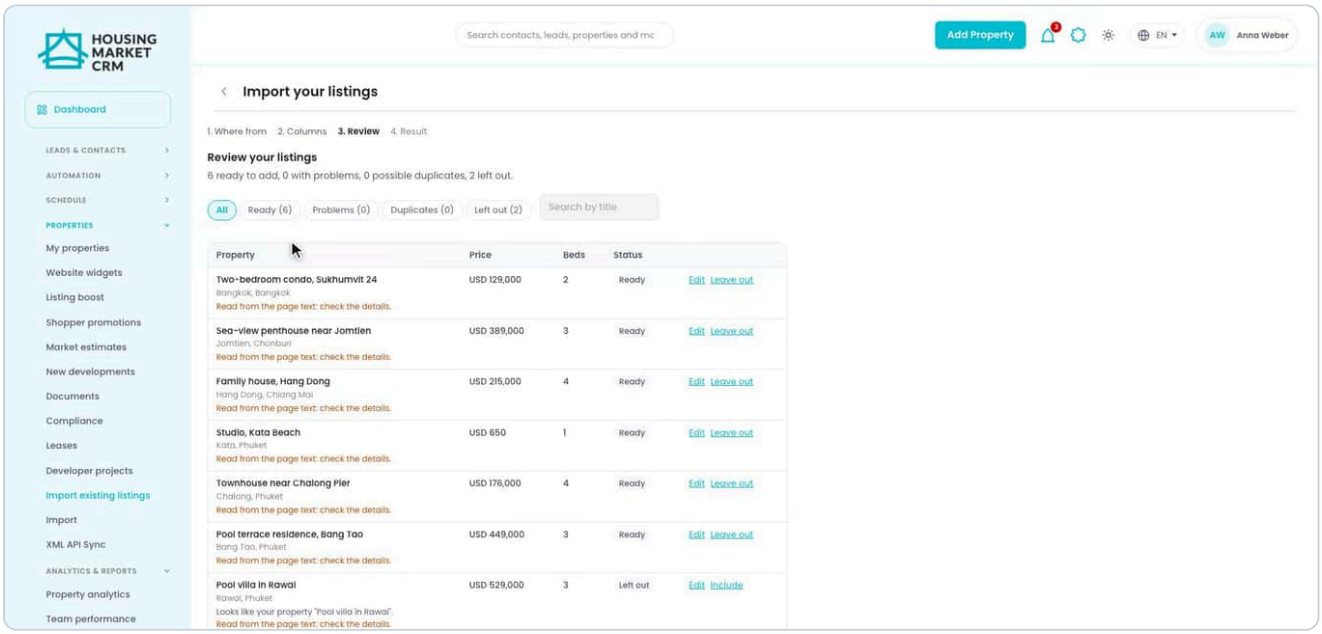


Figure 48.20 · Screen recorded 4 November 2026

21 The rest go into **My Properties**.

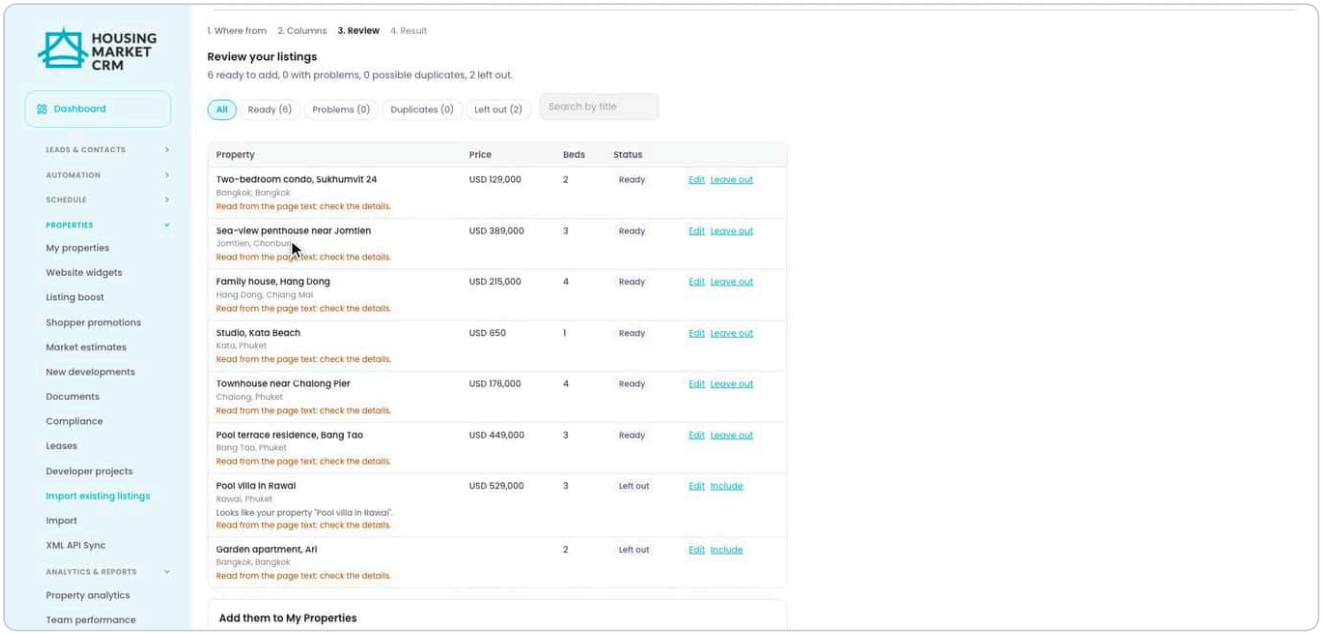


Figure 48.21 · Screen recorded 4 November 2026

22 They go to your **CRM only**. Nothing goes to a portal unless you tick the box.

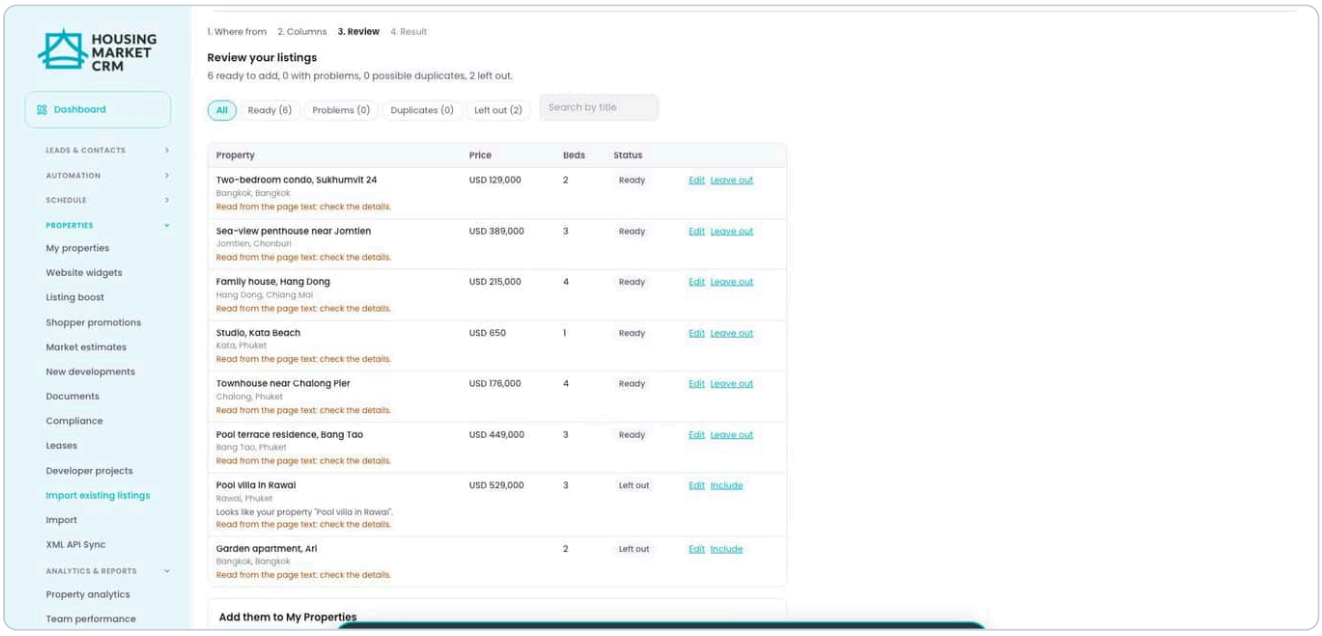


Figure 48.22 · Screen recorded 4 November 2026

23 Click **Add 6 properties**.

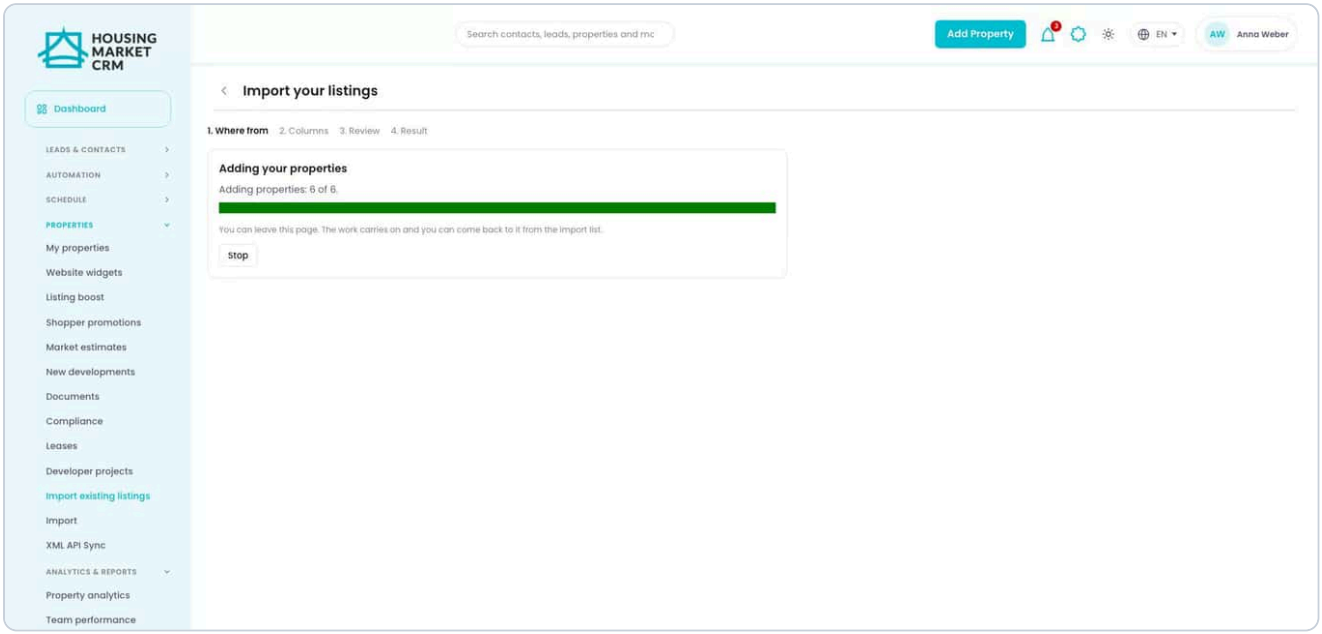


Figure 48.23 · Screen recorded 4 November 2026

24 **6 properties** were added.

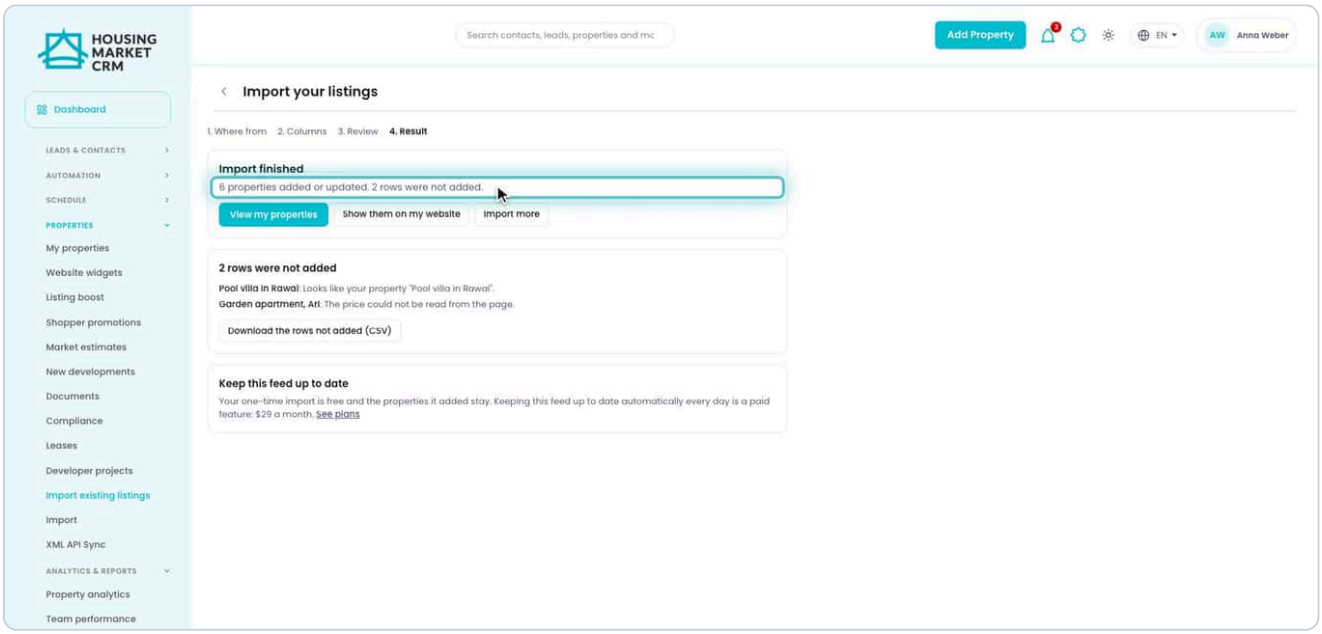


Figure 48.24 · Screen recorded 4 November 2026

25 Open **My Properties** to see them.

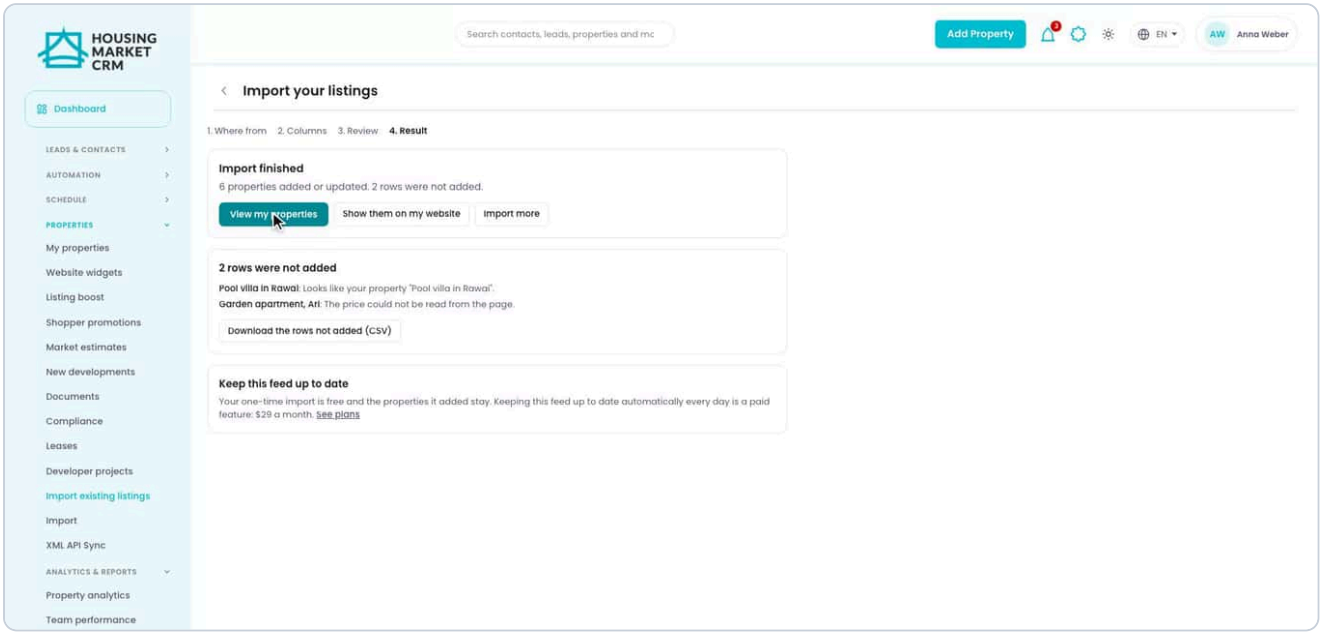


Figure 48.25 · Screen recorded 4 November 2026

RELATED HELP CENTER ARTICLES

Can I import from another CRM?	faq.housingmarketgroup.com/faq/can-i-import-from-another-crm
Can I manage my property listings?	faq.housingmarketgroup.com/faq/can-i-manage-my-property-listings
How do I import properties from a file?	faq.housingmarketgroup.com/faq/how-does-the-importer-add-on-work

49 CHAPTER 49

XML API sync: automatic daily feed import

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

Paste your feed link, match its fields and values once, check a preview, and from then on your feed is read once a day.

- Paste the link to your XML or JSON feed: under API/XML Sync in your portal dashboard, or under XML API Sync in Housing Market CRM.
- We read it and suggest which of its fields holds the title, price, listing type, property type, address, photos and so on. You accept or change each suggestion.
- We suggest a meaning for the values your feed uses, for example that “condo” in your feed means Condo on the portal. You accept or change each one.
- You see a preview of up to 20 listings, with any problem named by its field, before anything is imported.
- After the first import, your feed is read once a day.

You can change the mapping, pause and resume the sync, or remove the feed at any time. Removing a feed stops the sync; the listings it brought in stay on your account.

From the Help Center: **How does API or XML listing synchronization work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

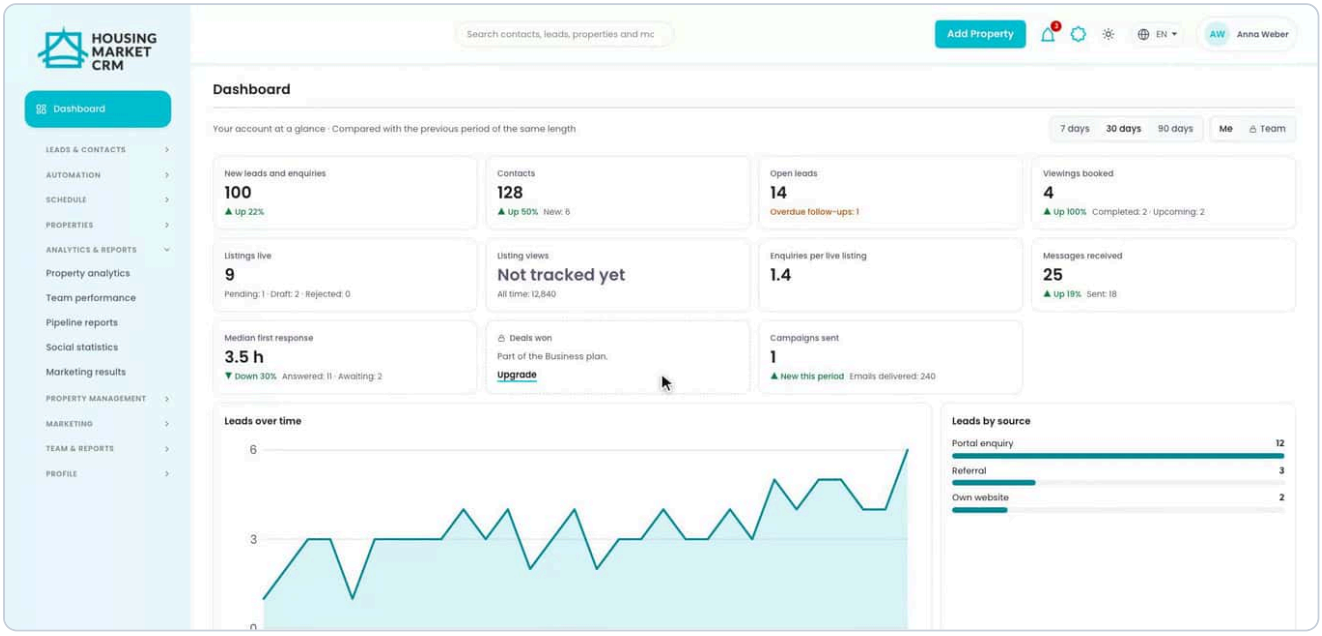


Figure 49.1 · Screen recorded 4 November 2026

2 Open **Properties** in the left menu.

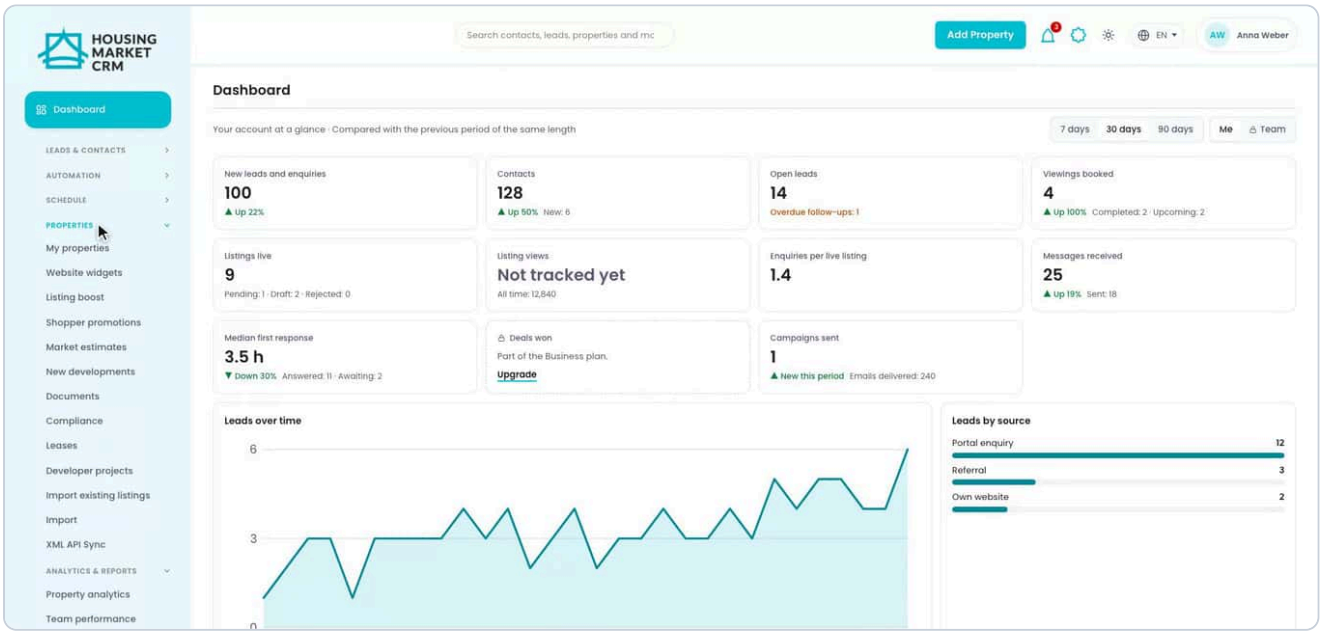


Figure 49.2 · Screen recorded 4 November 2026

3 Click **XML API Sync**.

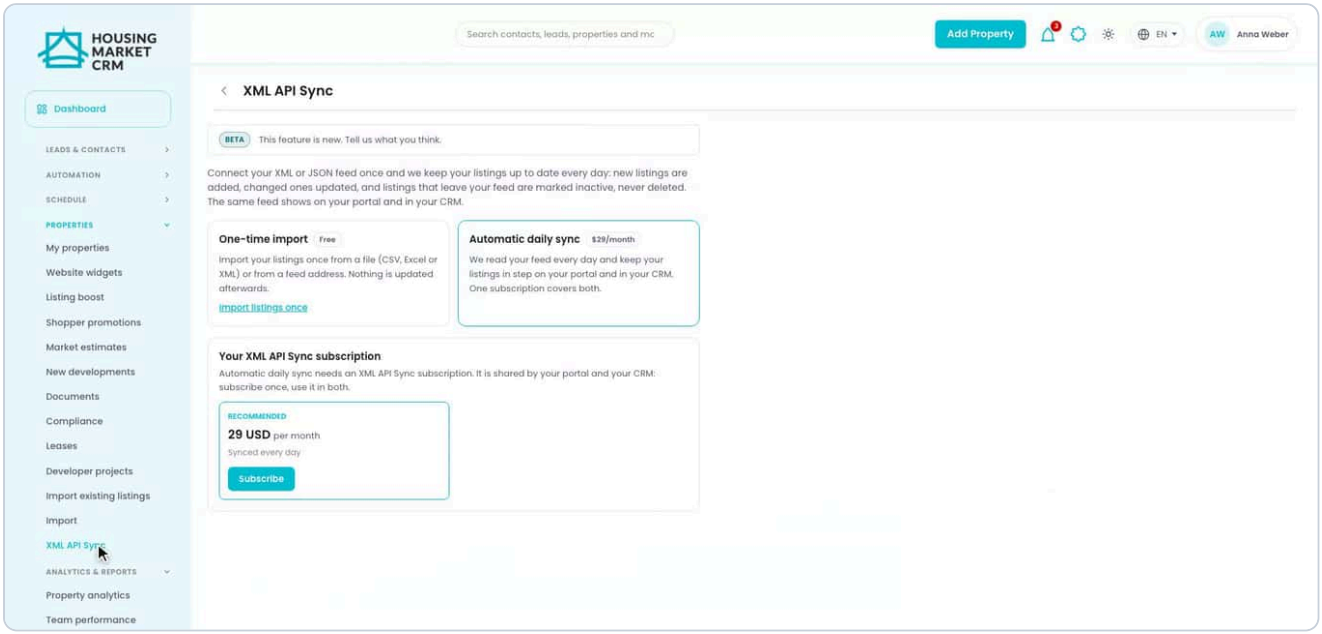


Figure 49.3 · Screen recorded 4 November 2026

4 Connect your **feed** once and your listings are kept **up to date** every day.

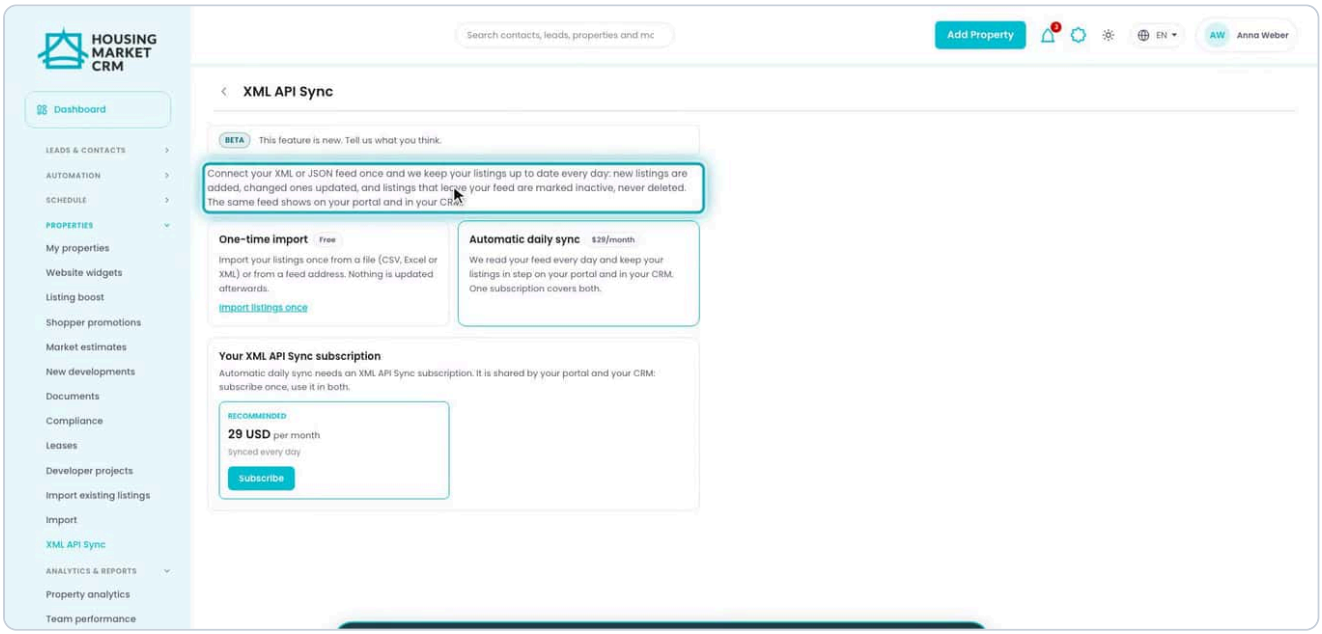


Figure 49.4 · Screen recorded 4 November 2026

5 **One-time import** is free: bring your listings in once, from a file or a feed address.

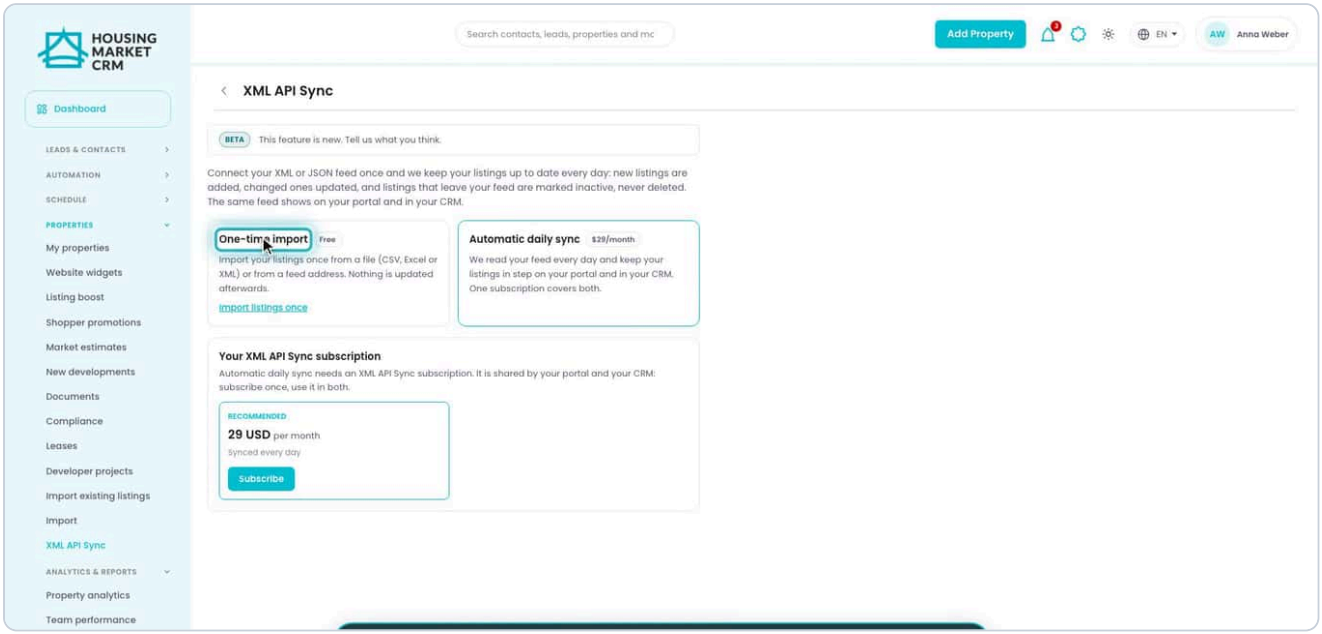


Figure 49.5 · Screen recorded 4 November 2026

6 **Automatic daily sync** reads your feed every day.

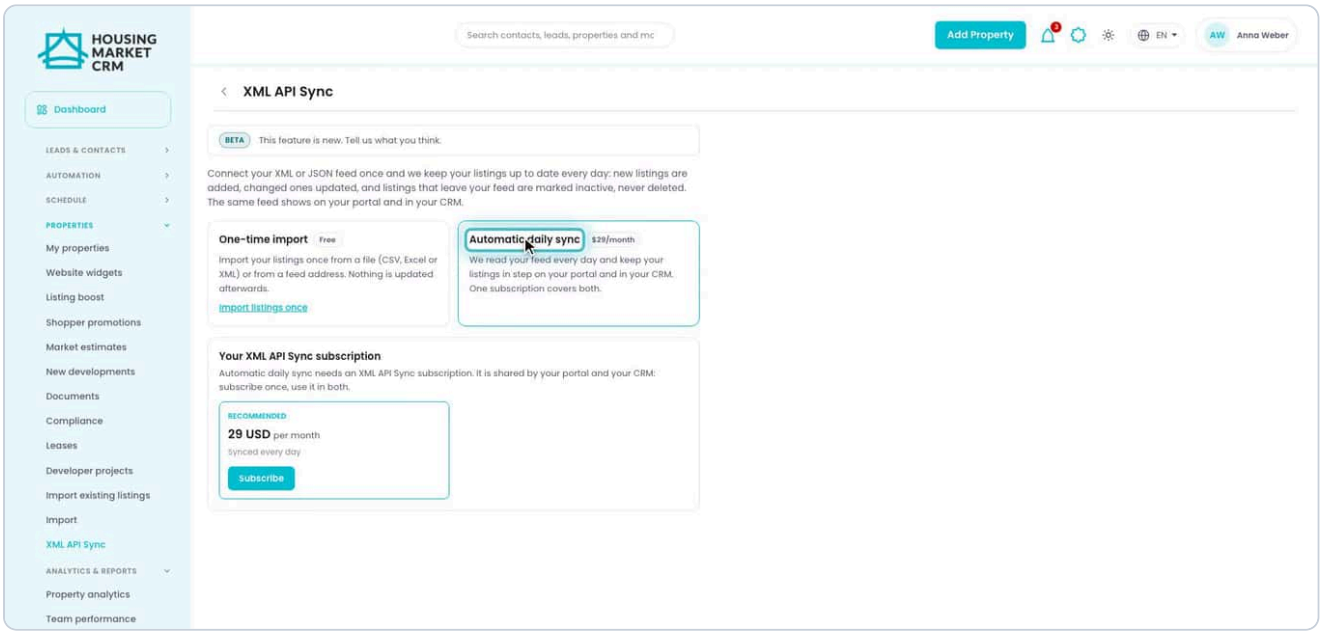


Figure 49.6 · Screen recorded 4 November 2026

7 Automatic daily sync needs a **subscription**.

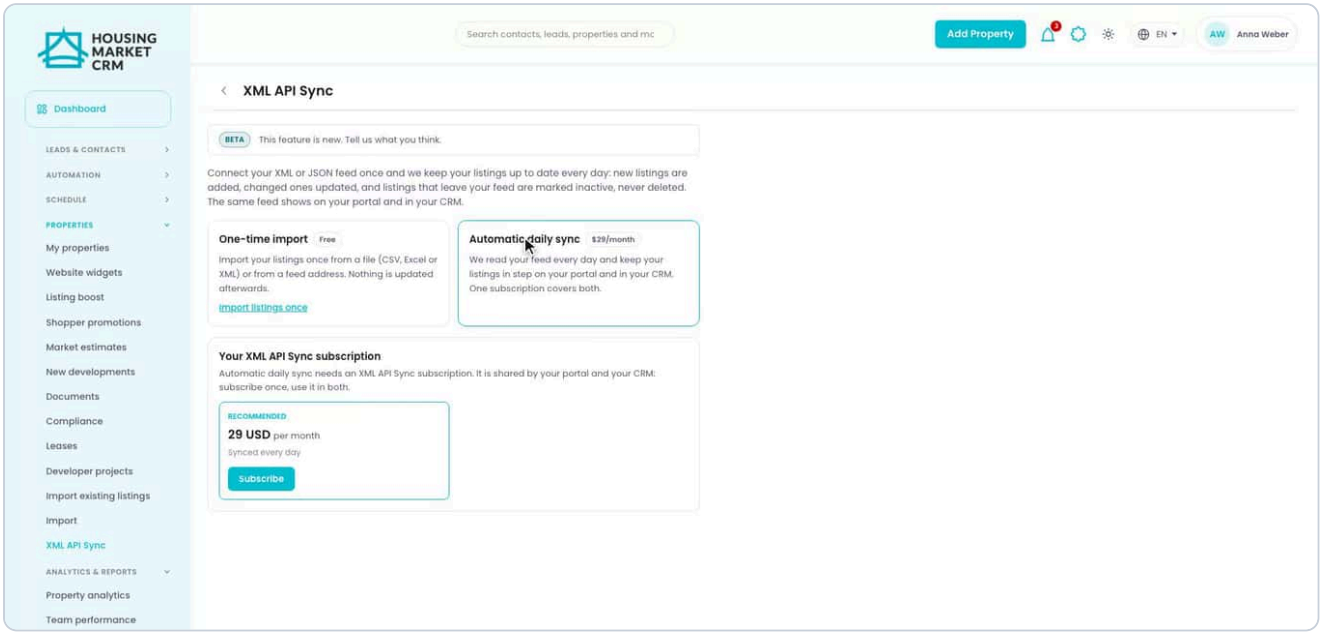


Figure 49.7 · Screen recorded 4 November 2026

8 It is **shared** by your portal and your CRM: subscribe once, use it in both.

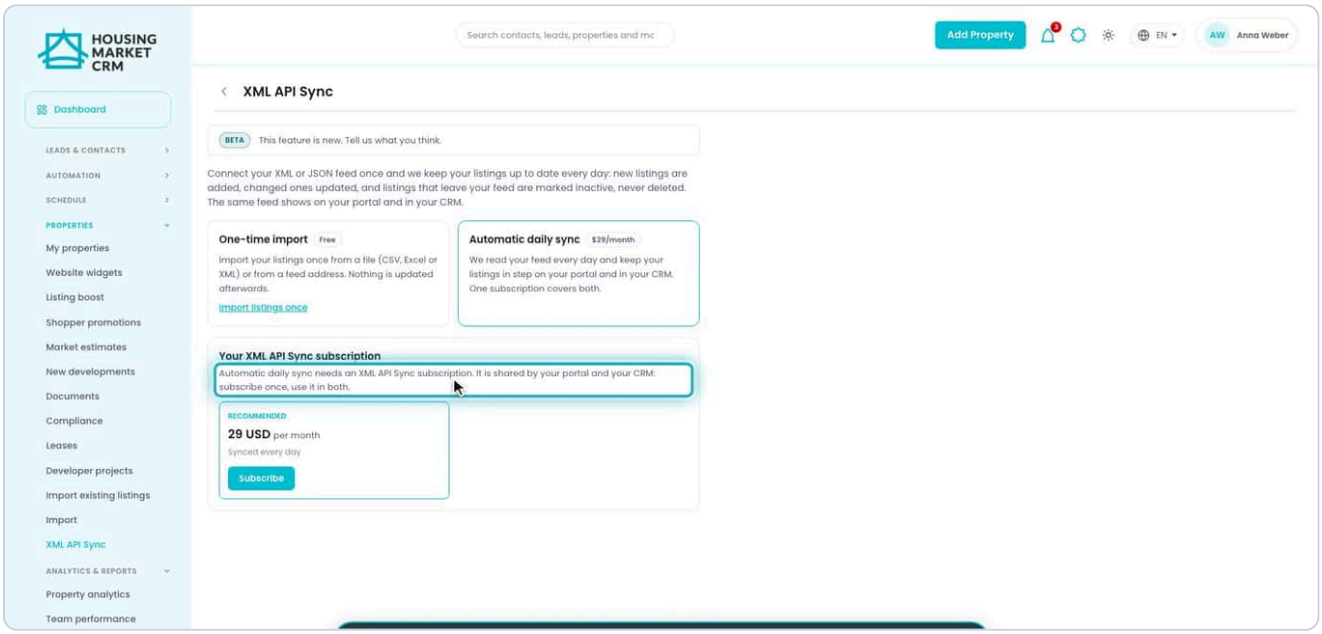


Figure 49.8 · Screen recorded 4 November 2026

9 **Subscribe** opens a secure payment page. We stop here.

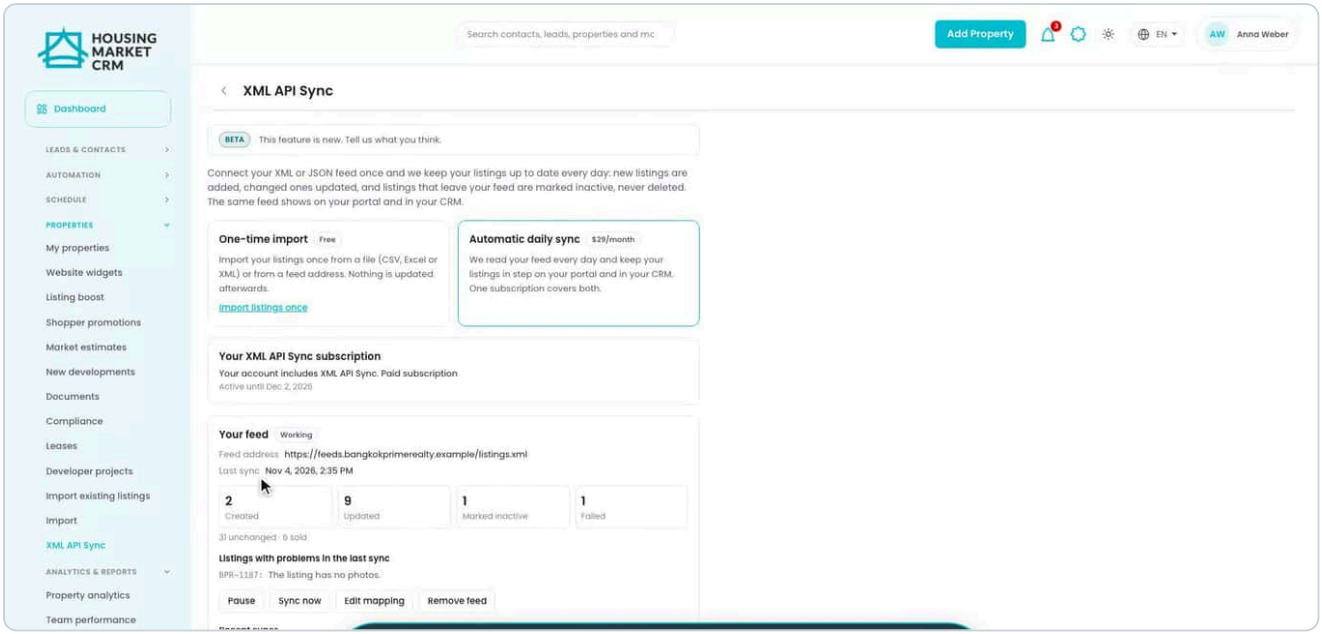


Figure 49.9 · Screen recorded 4 November 2026

10 Once a feed is running, this page shows how it is doing.

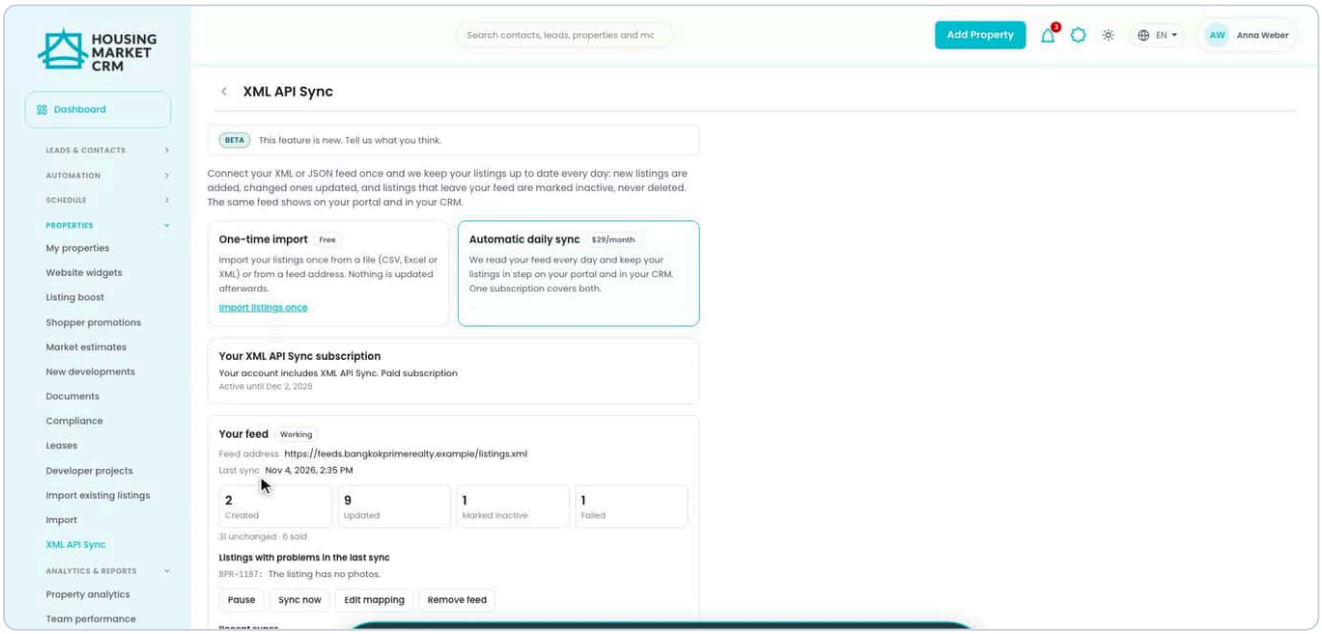


Figure 49.10 · Screen recorded 4 November 2026

11 Here is your feed.

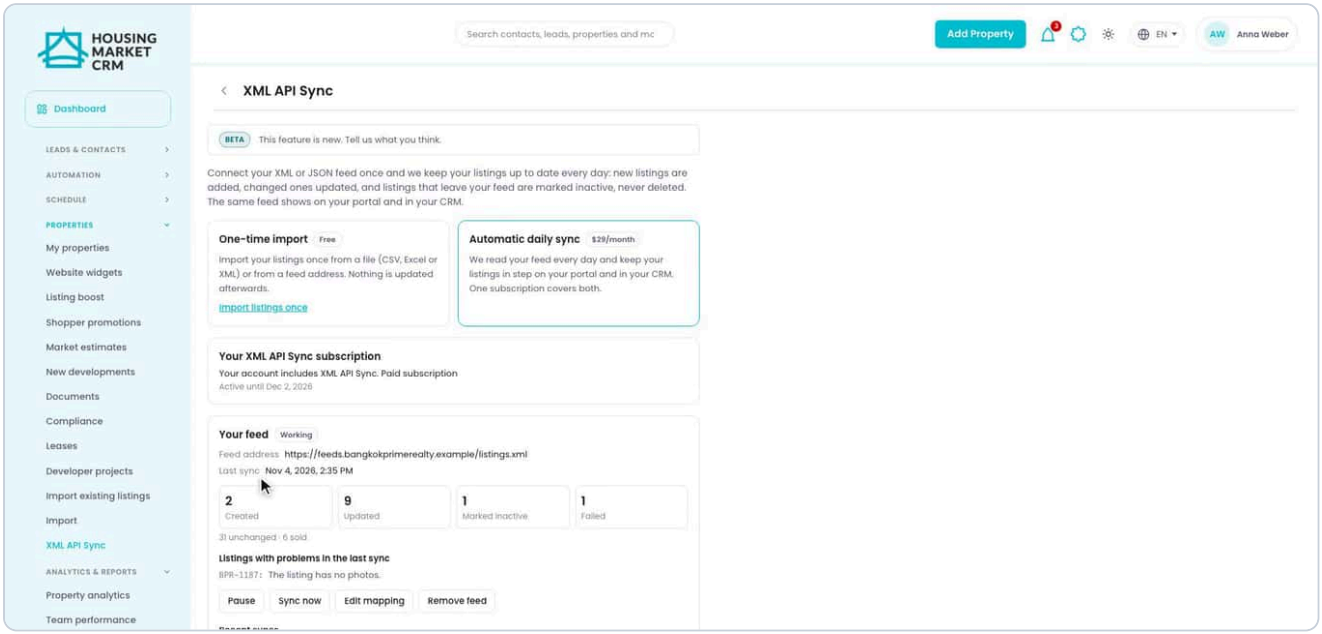


Figure 49.11 · Screen recorded 4 November 2026

12 It is working.

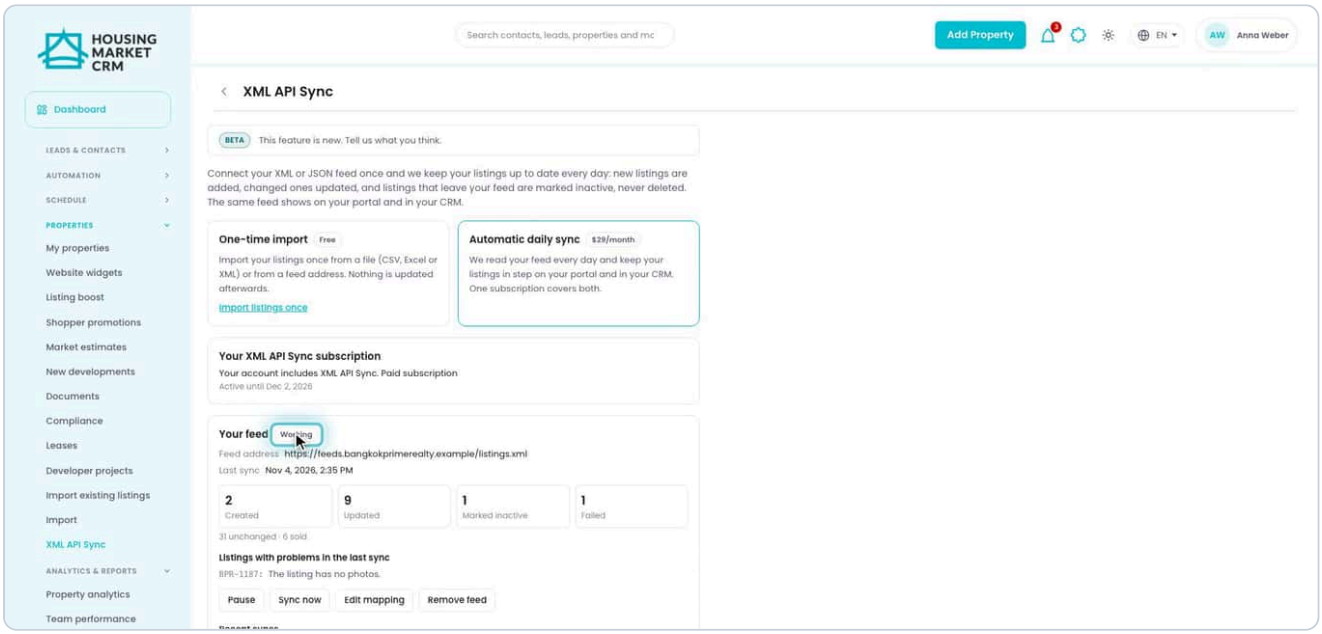


Figure 49.12 · Screen recorded 4 November 2026

13 See when it was **last read** and how many listings were **created, updated** and **marked inactive**.

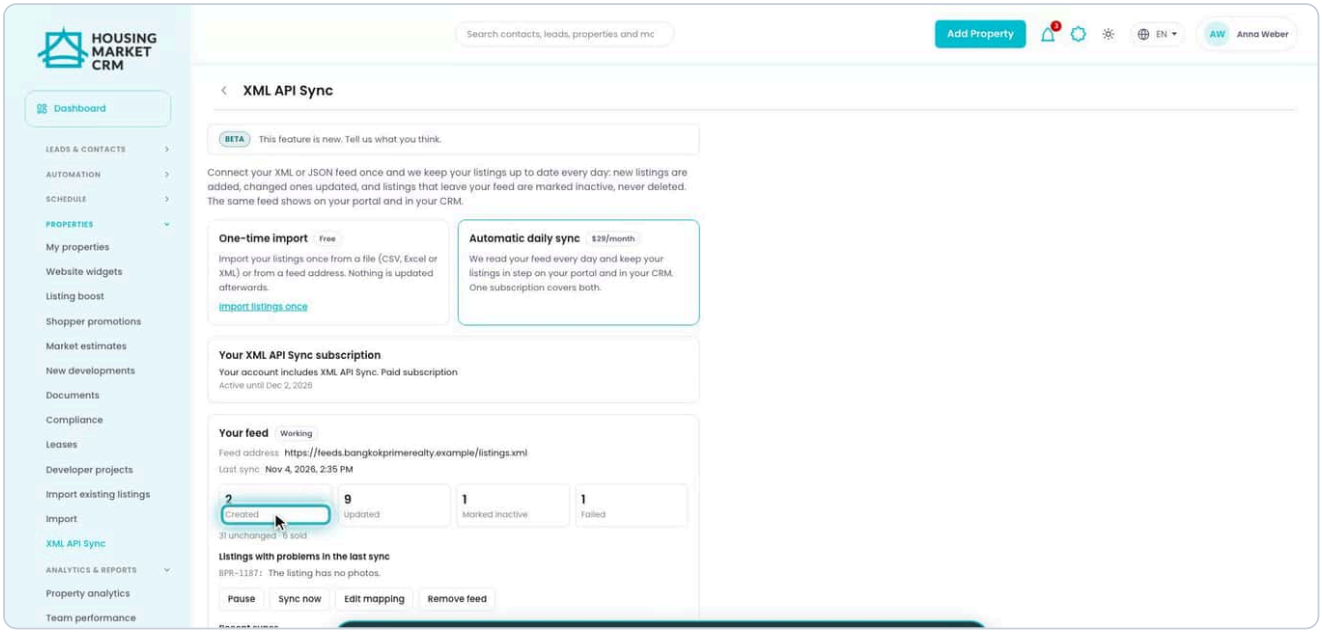


Figure 49.13 · Screen recorded 4 November 2026

14 A listing with a **problem** is named here, with the reason.

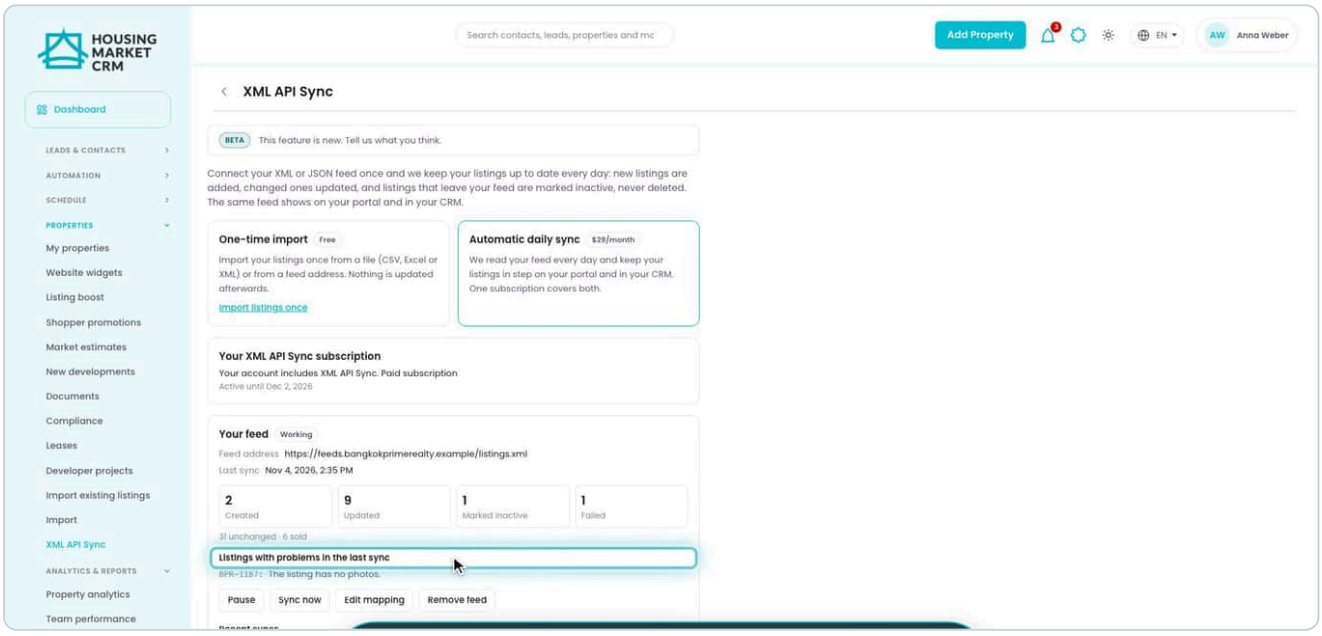


Figure 49.14 · Screen recorded 4 November 2026

15 **Sync now** reads the feed straight away.

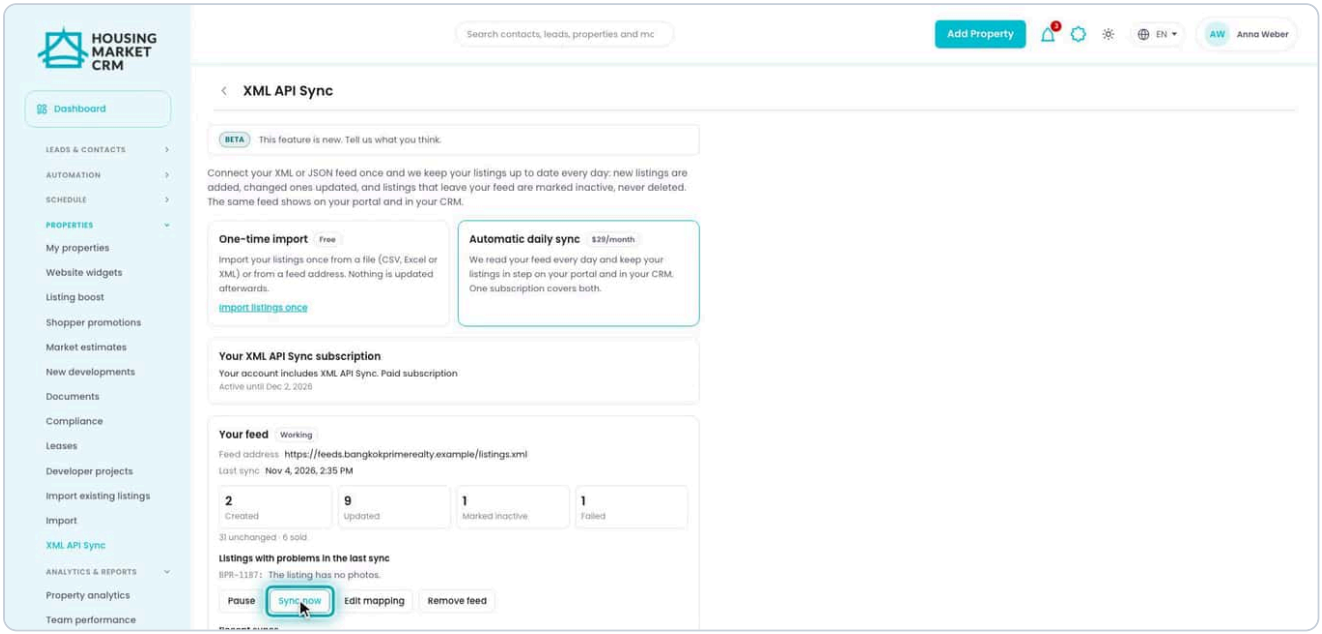


Figure 49.15 · Screen recorded 4 November 2026

16 **Pause** stops the daily sync; your listings stay as they are.

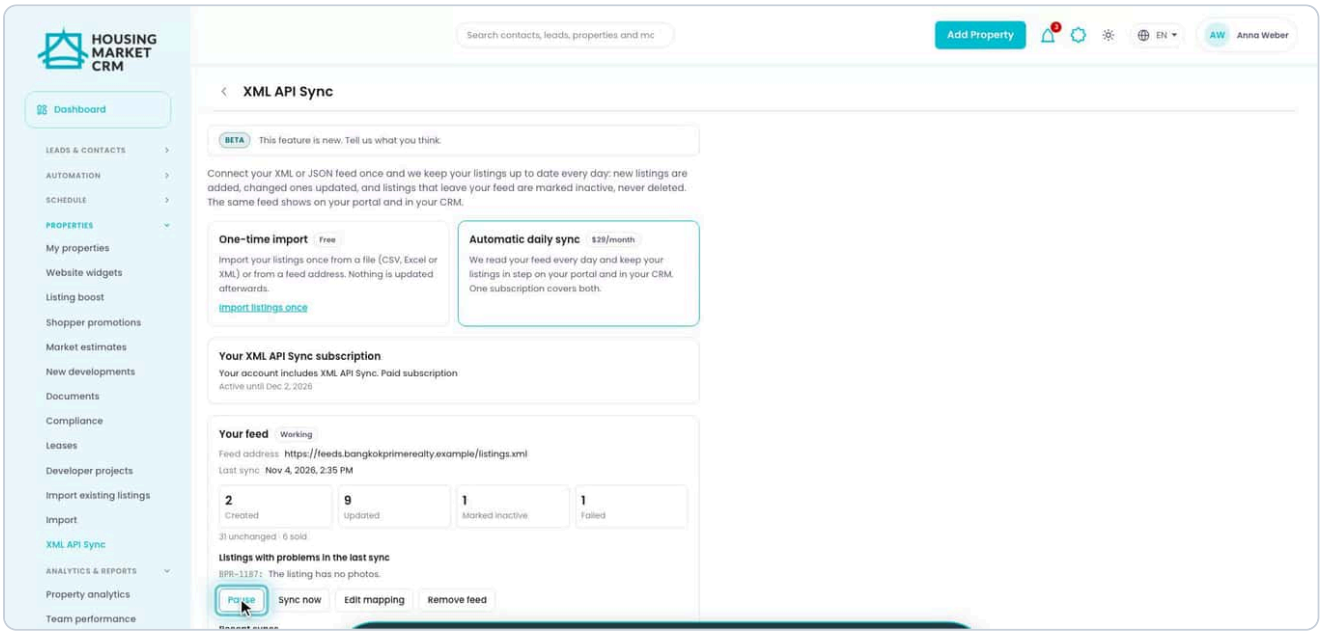


Figure 49.16 · Screen recorded 4 November 2026

17 Listings that leave your feed are **marked inactive**, never deleted.

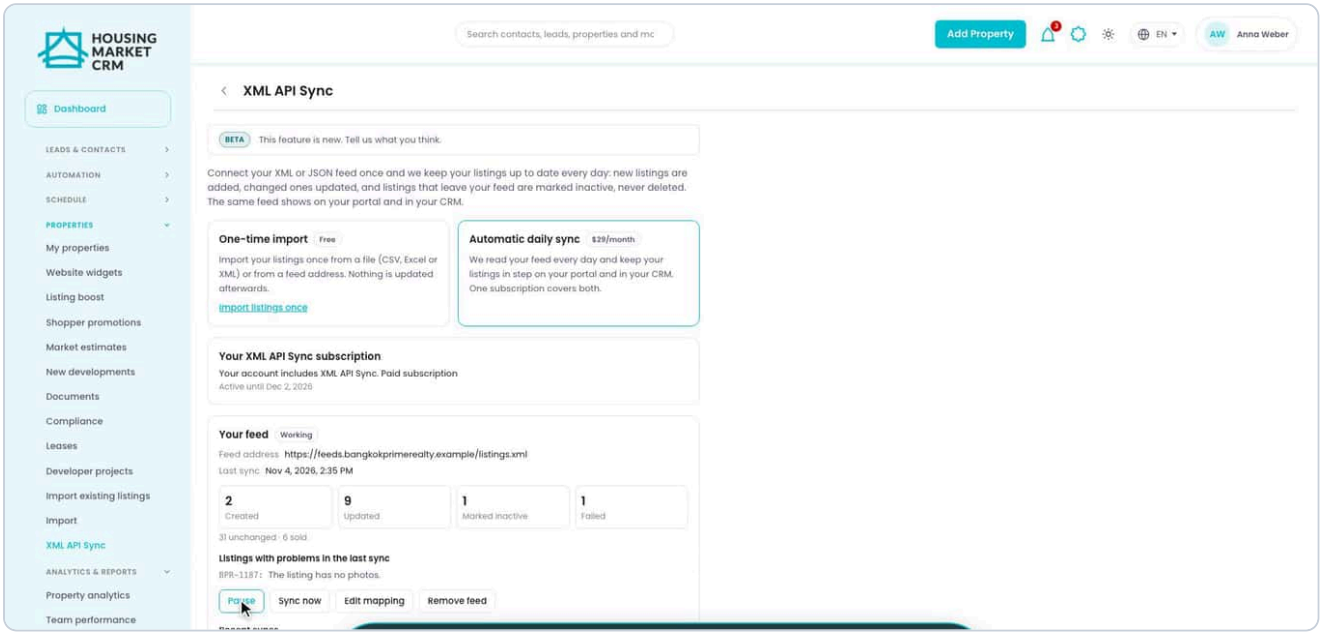


Figure 49.17 · Screen recorded 4 November 2026

RELATED HELP CENTER ARTICLES

Can I import from another CRM?	faq.housingmarketgroup.com/faq/can-i-import-from-another-crm
How do I import properties from a file?	faq.housingmarketgroup.com/faq/how-does-the-importer-add-on-work
Which property-feed formats do you support?	faq.housingmarketgroup.com/faq/which-property-feed-formats-do-you-support
How quickly do feed updates appear?	faq.housingmarketgroup.com/faq/how-quickly-do-feed-updates-appear

PART 4

Communication and scheduling

50 Messages

51 WhatsApp from a contact

52 WhatsApp templates

53 Send a bulk email

54 The notification centre

55 Email notifications

56 The calendar

57 Connect your calendar

58 Schedule viewings

59 Viewings offline

60 Add contacts to your mailing list

61 How the CRM protects your email marketing

62 Send an email campaign

63 Promote a listing to portal shoppers

64 Connect your Microsoft 365 mailbox

65 Disconnect your Microsoft 365 mailbox

66 Reconnect your Microsoft 365 mailbox

67 Unanswered lead reminders

68 Choose when your office manager is told about an unanswered lead

69 Switch off the unanswered lead reminder

70 Remove a manual entry from the suppression list

71 Email marketing limits and the suppression list

50 CHAPTER 50

Messages

All plans | For agents | Watch the video

OVERVIEW

Messages lists the enquiries on your portal listings as conversations, one per enquiry, each with the listing it is about. Reply there and the person who enquired is emailed.

Choose Messages in the left menu. Each conversation is one enquiry on one of your portal listings, with the messages exchanged on it and a card for the listing it is about, which you can open.

- All shows every conversation. Unread shows the ones where the enquirer wrote last and you have not opened the conversation since; a new enquiry counts as unread, and opening it marks it read for you only.
- Type your reply and choose Send. It is saved in the conversation and emailed to the person who enquired. Replies are limited to 500 characters. If the reply was saved but the email did not go, the screen tells you.
- Archive moves a finished conversation to Archived, and Unarchive brings it back. Archiving hides a conversation; it deletes nothing.

Messages and the Inbox

The Inbox is a separate screen. It keeps one thread per person and also gathers Housing Market Ads leads and the email you send from the CRM; Messages keeps one conversation per portal enquiry. Reading a conversation in one does not mark it read in the other.

From the Help Center: **What is the Messages screen in the CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

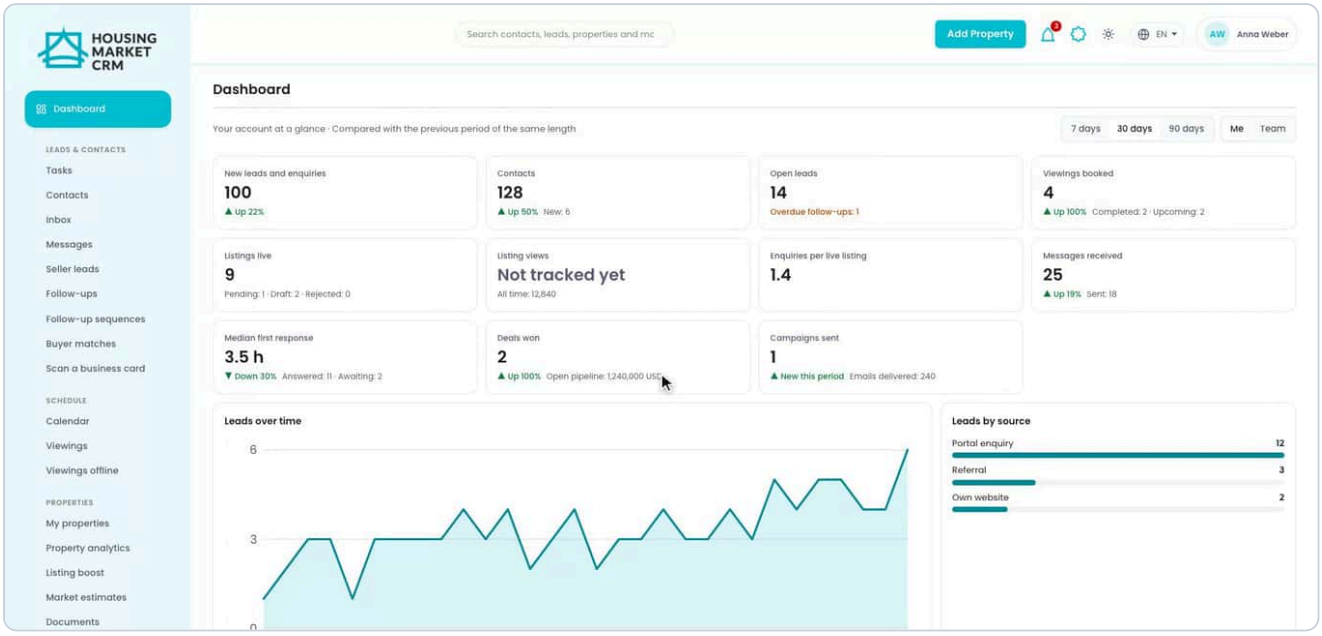


Figure 50.1 · Screen recorded 8 October 2026

2 Click **Messages** in the left menu.

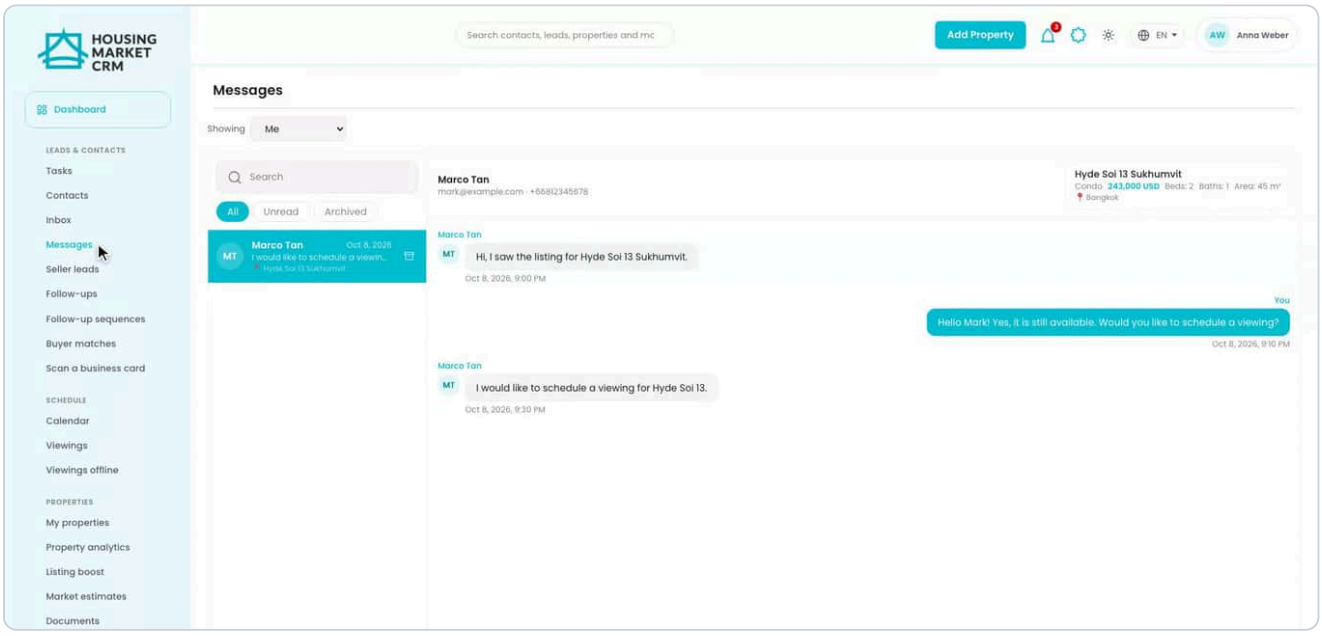


Figure 50.2 · Screen recorded 8 October 2026

3 Every exchange with one person sits in **one thread**.

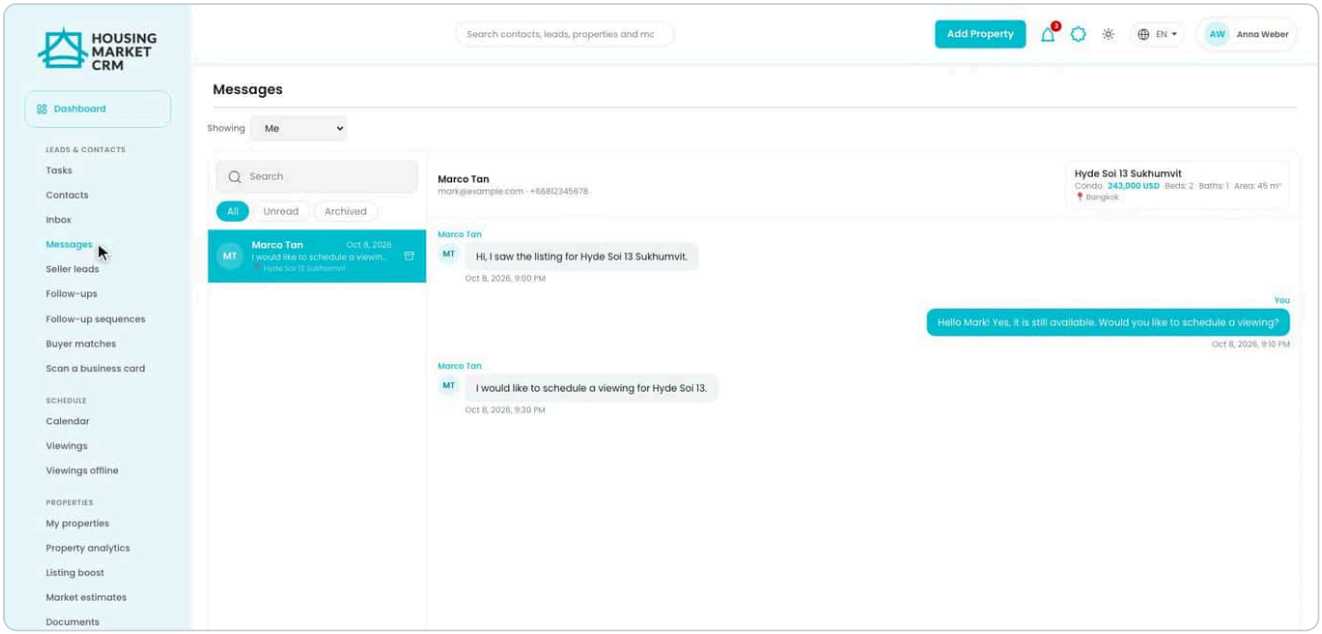


Figure 50.3 · Screen recorded 8 October 2026

4 Open a conversation.

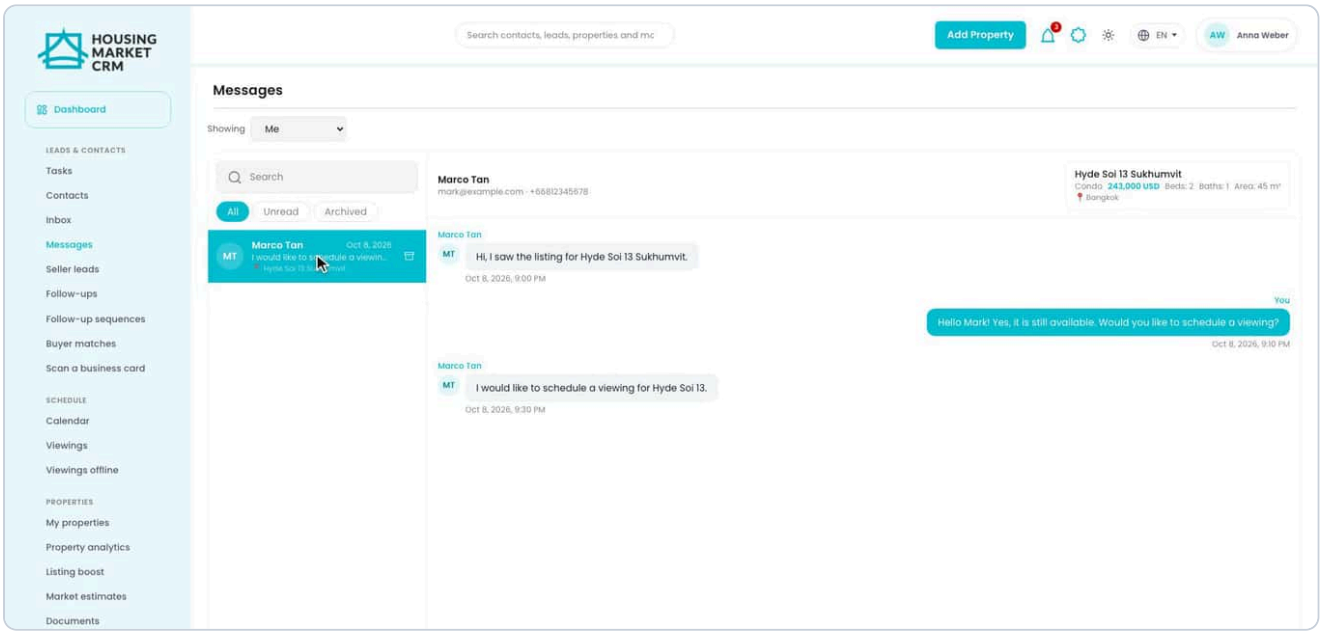


Figure 50.4 · Screen recorded 8 October 2026

5 The listing they asked about is **linked**, so you can open it.

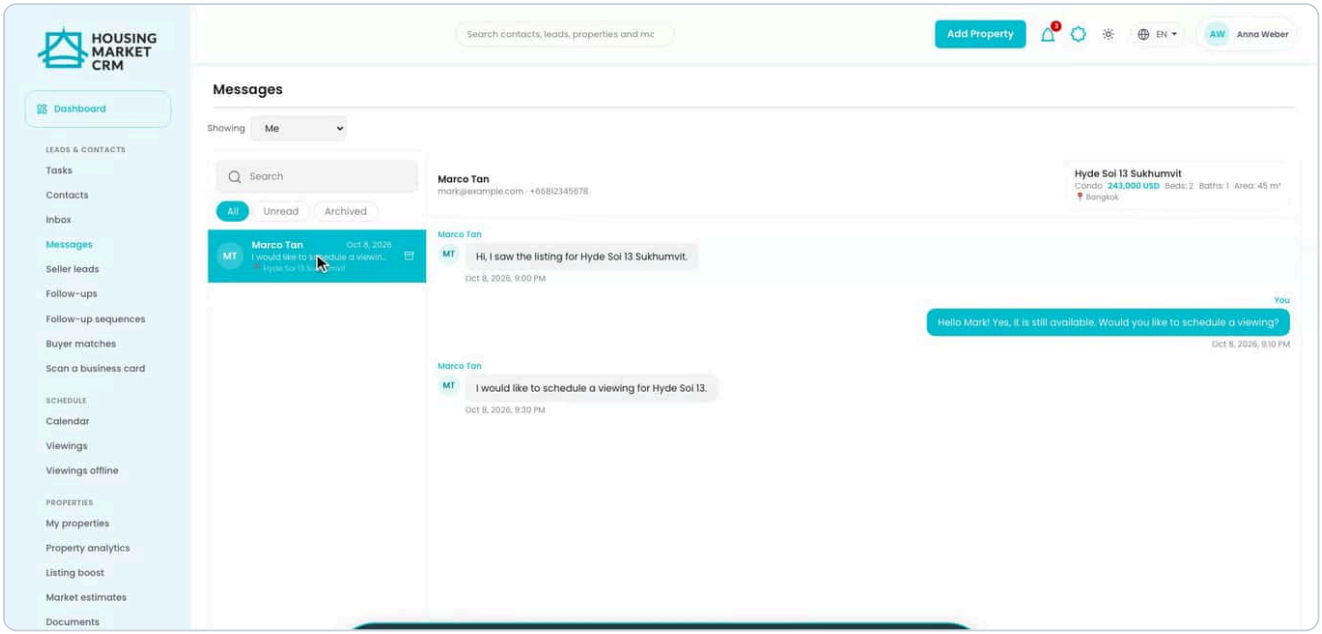


Figure 50.5 · Screen recorded 8 October 2026

6 Filter to **Unread** — your list for the morning.

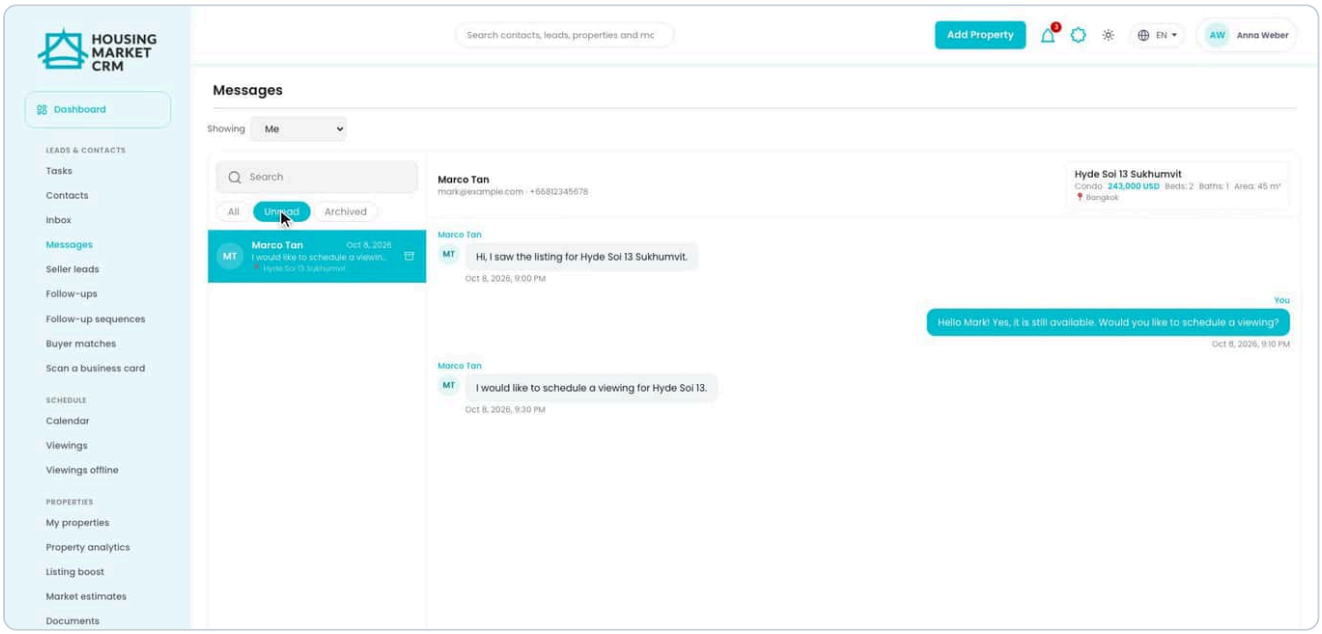


Figure 50.6 · Screen recorded 8 October 2026

7 Back to **All**.

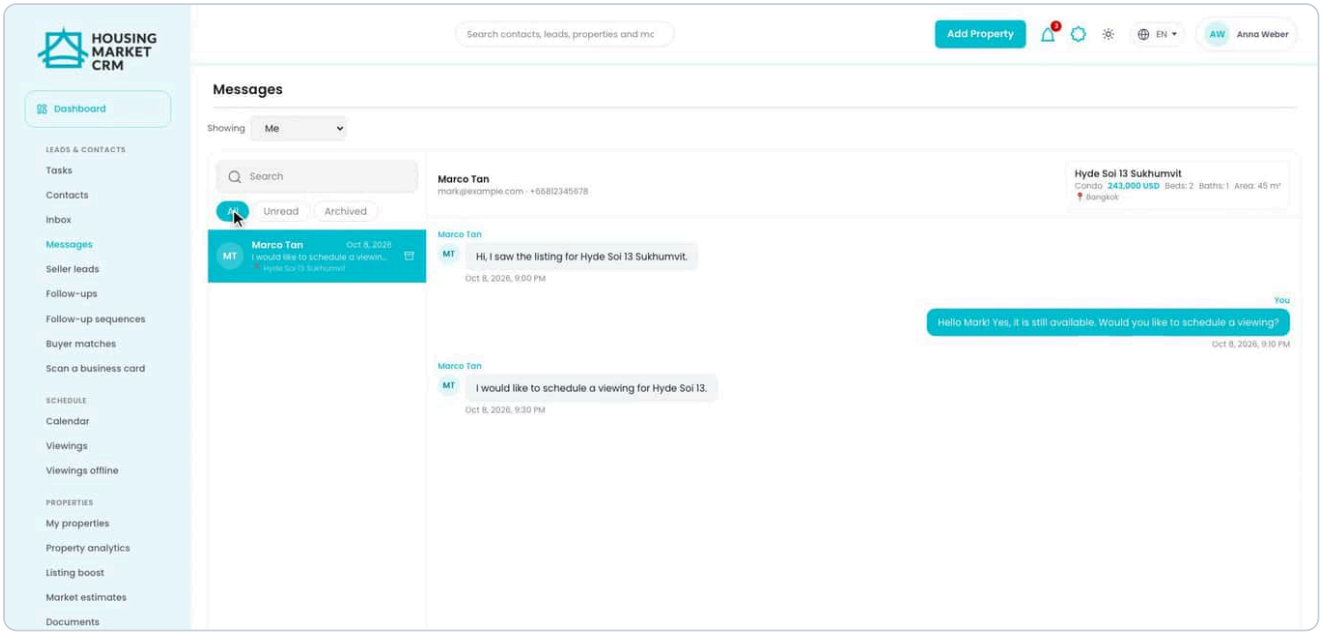


Figure 50.7 · Screen recorded 8 October 2026

8 Type your reply and press **Send**.

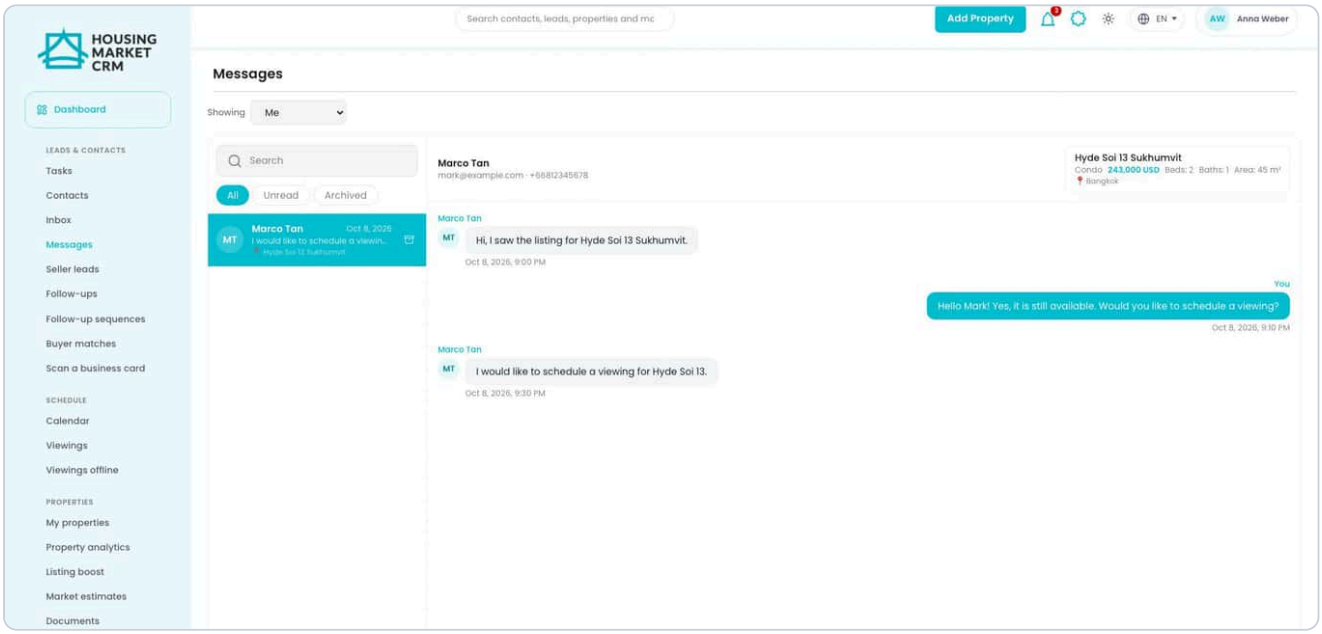


Figure 50.8 · Screen recorded 8 October 2026

9 **Archived** keeps finished conversations out of the way.

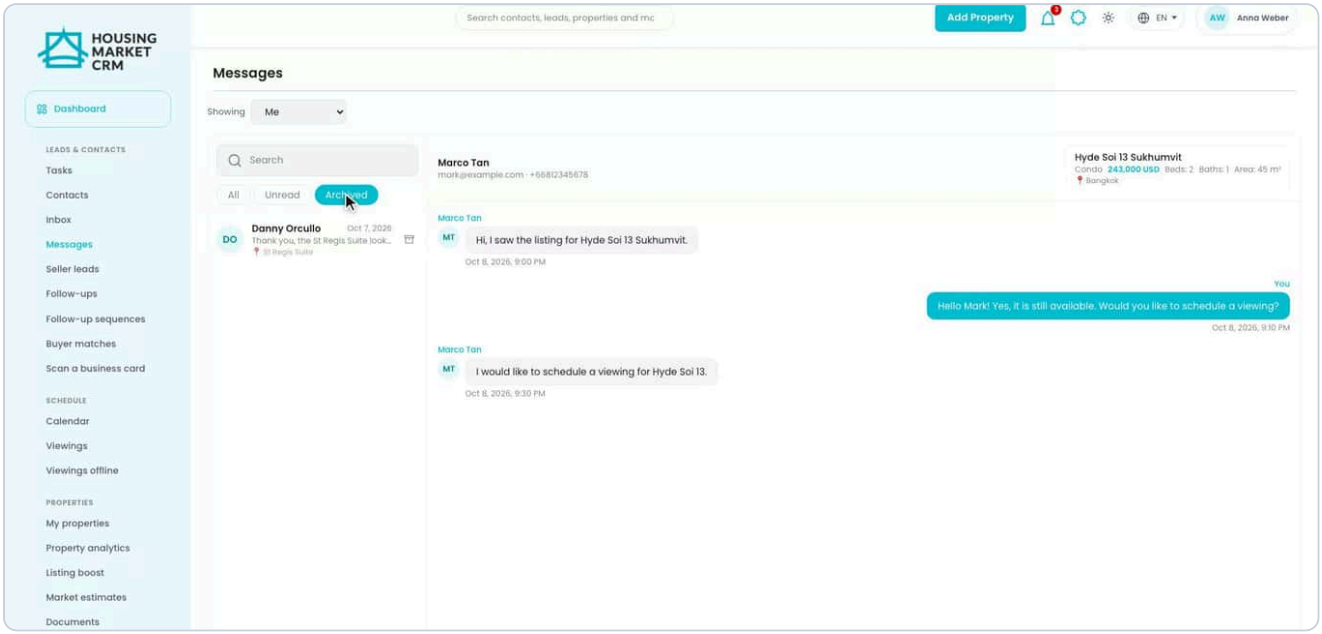


Figure 50.9 · Screen recorded 8 October 2026

10 Archiving **hides** a conversation — it is never deleted.

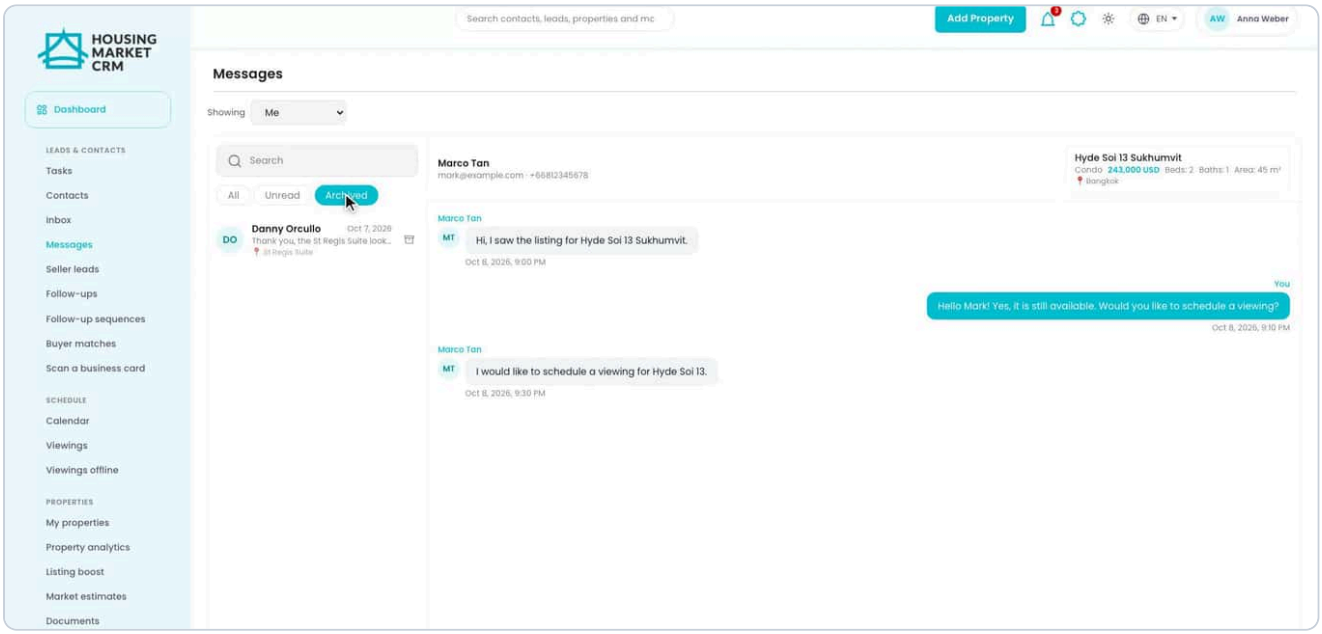


Figure 50.10 · Screen recorded 8 October 2026

RELATED HELP CENTER ARTICLES

What is the inbox in the CRM?	faq.housingmarketgroup.com/faq/what-is-the-unified-inbox
Can I track communication with buyers?	faq.housingmarketgroup.com/faq/can-i-track-communication-with-buyers

51 CHAPTER 51

WhatsApp from a contact

Pro and Business | For agents | Watch the video

OVERVIEW

On Pro, write WhatsApp message templates in any language, fill one in for a contact and a listing, and open WhatsApp on your own phone with the text ready. The CRM does not send WhatsApp messages itself.

In the WhatsApp settings, write the messages you send often, in any language the CRM offers. Choose a template, preview it filled in for a contact and a listing, then copy it or open WhatsApp on your device with the text ready to send.

The message goes from your own WhatsApp account, as it always has, so there is no charge from us for it. Sending and receiving WhatsApp Business messages inside the CRM, and seeing them in the inbox, is being built.

From the Help Center: **How do WhatsApp templates work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

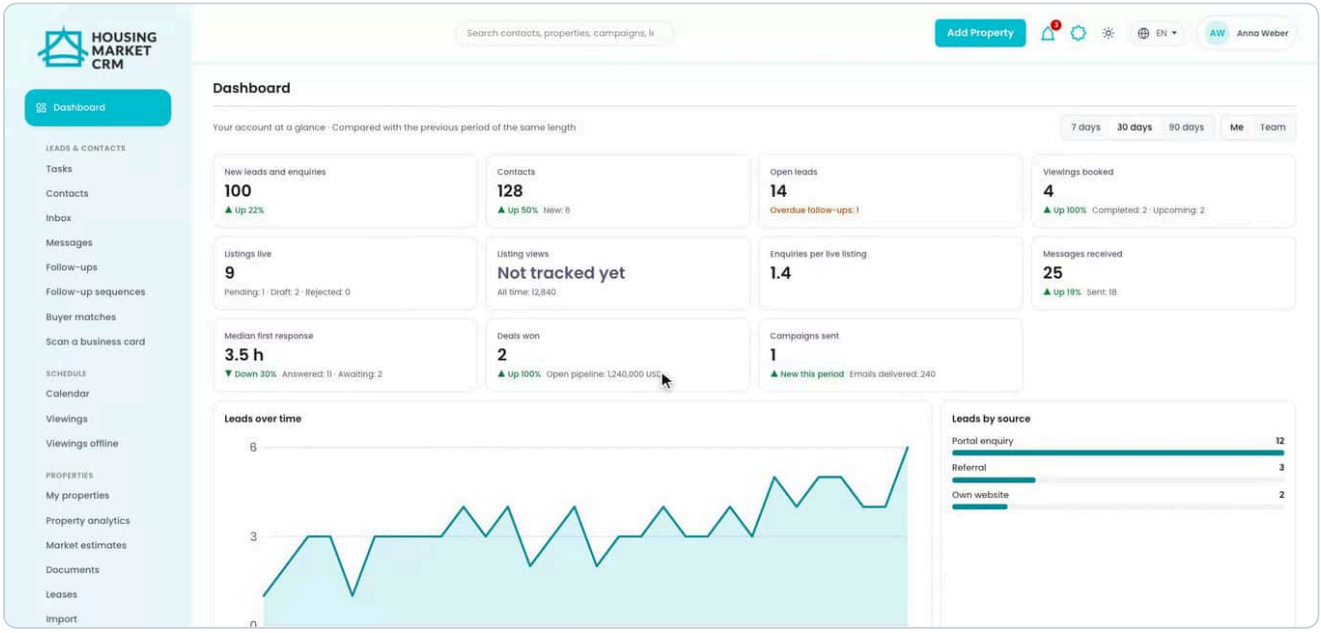


Figure 51.1 · Screen recorded 17 September 2026

2 Click **WhatsApp templates** in the left menu.

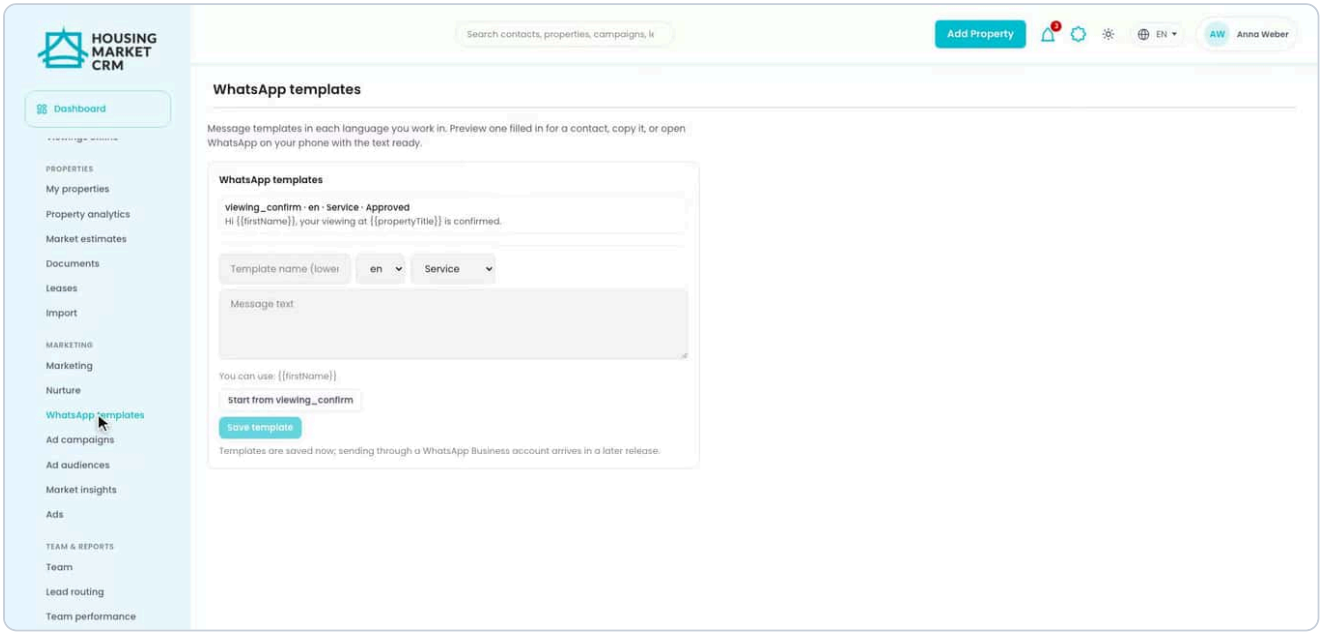


Figure 51.2 · Screen recorded 17 September 2026

3 Give the template a **name**.

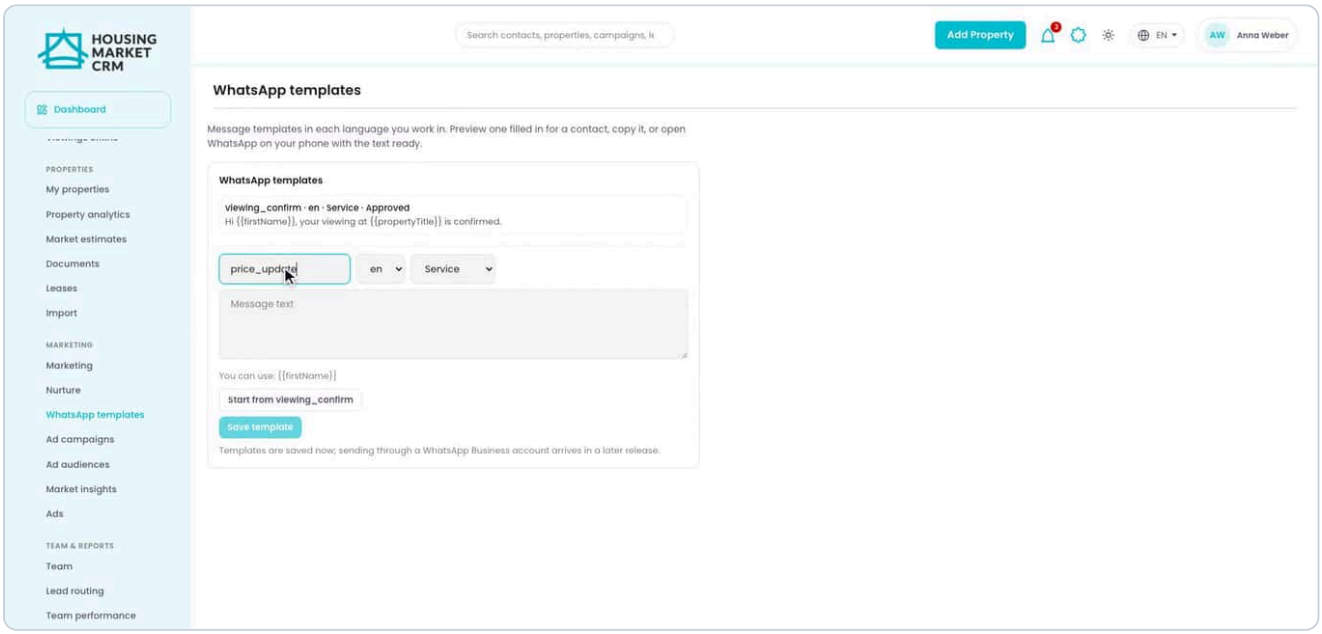


Figure 51.3 · Screen recorded 17 September 2026

4 Write the **message** — use {{firstName}} for the name.

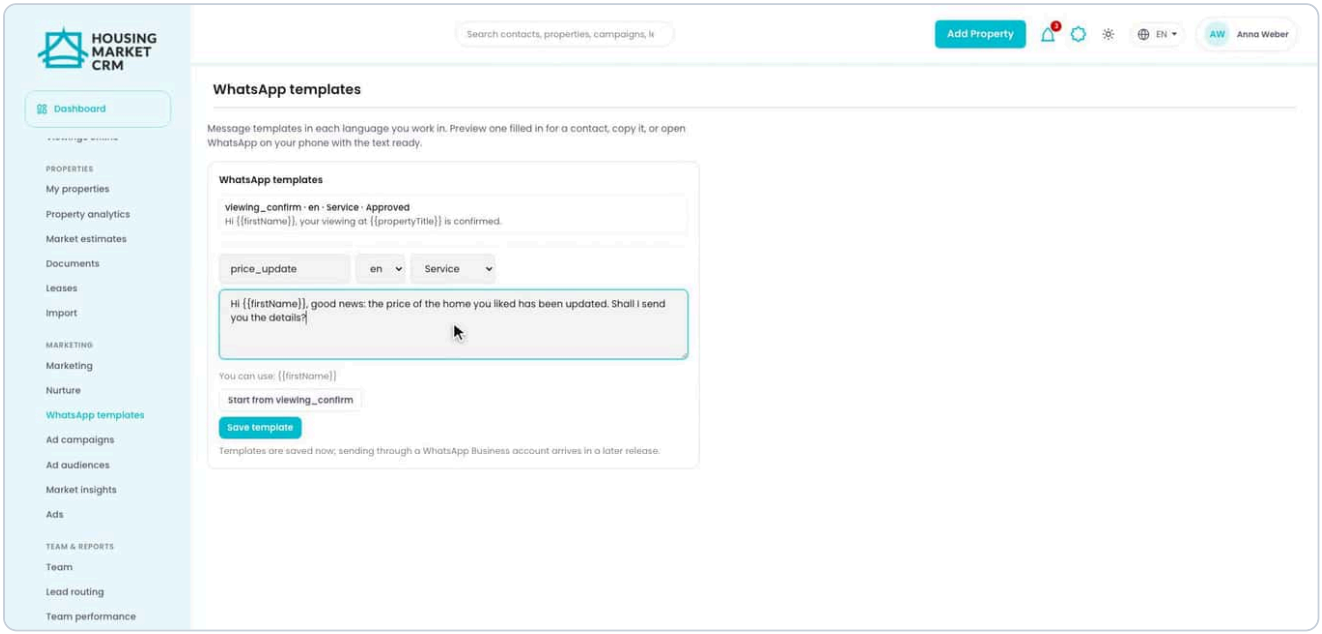


Figure 51.4 · Screen recorded 17 September 2026

5 Click **Save template**.

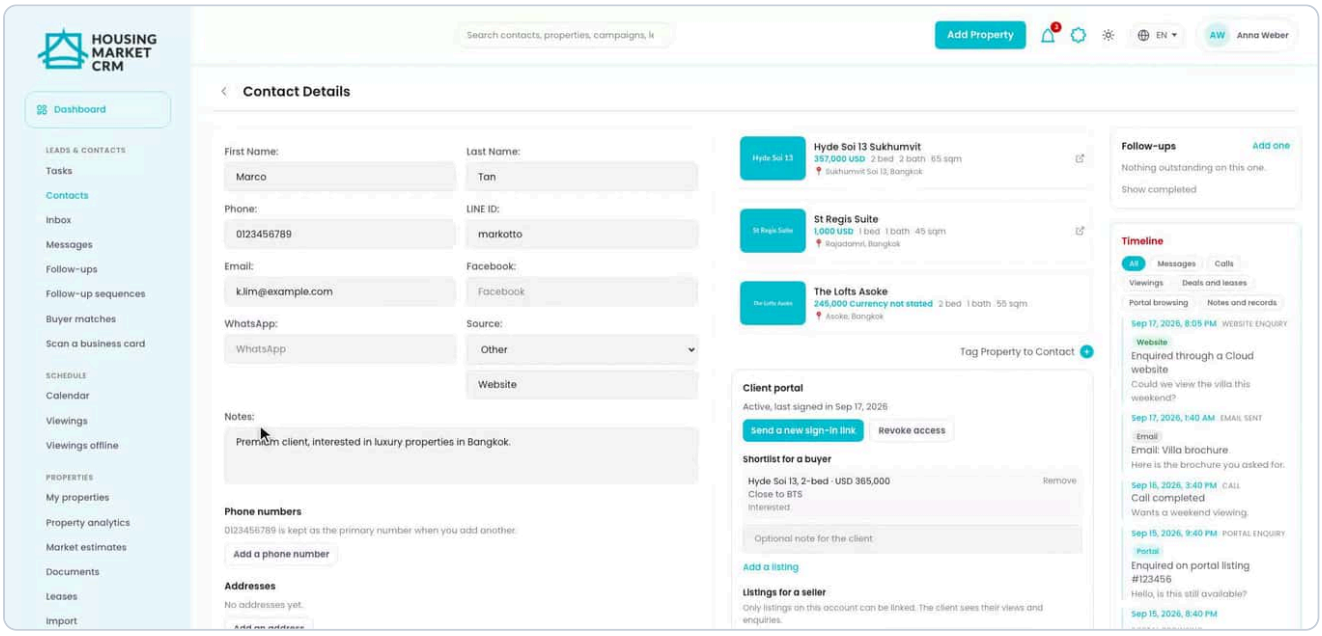


Figure 51.5 · Screen recorded 17 September 2026

6 Open a **contact** and find the **WhatsApp** panel.

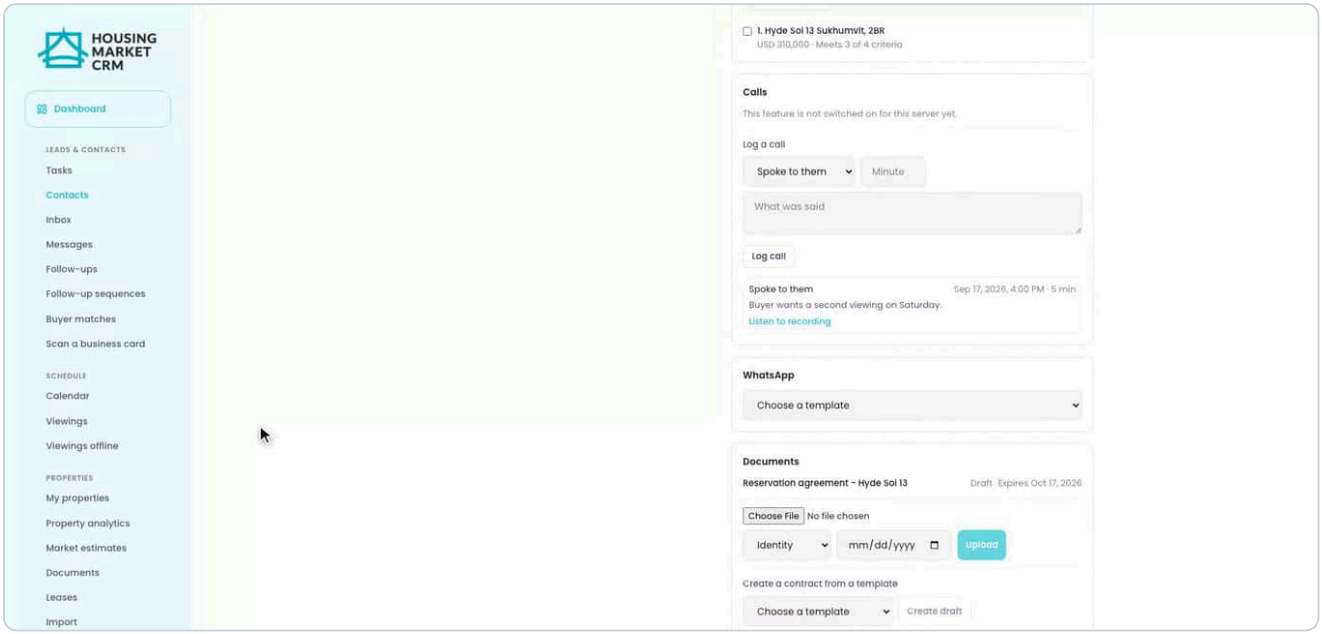


Figure 51.6 · Screen recorded 17 September 2026

7 Choose a template: the CRM fills in the details and opens **WhatsApp**.

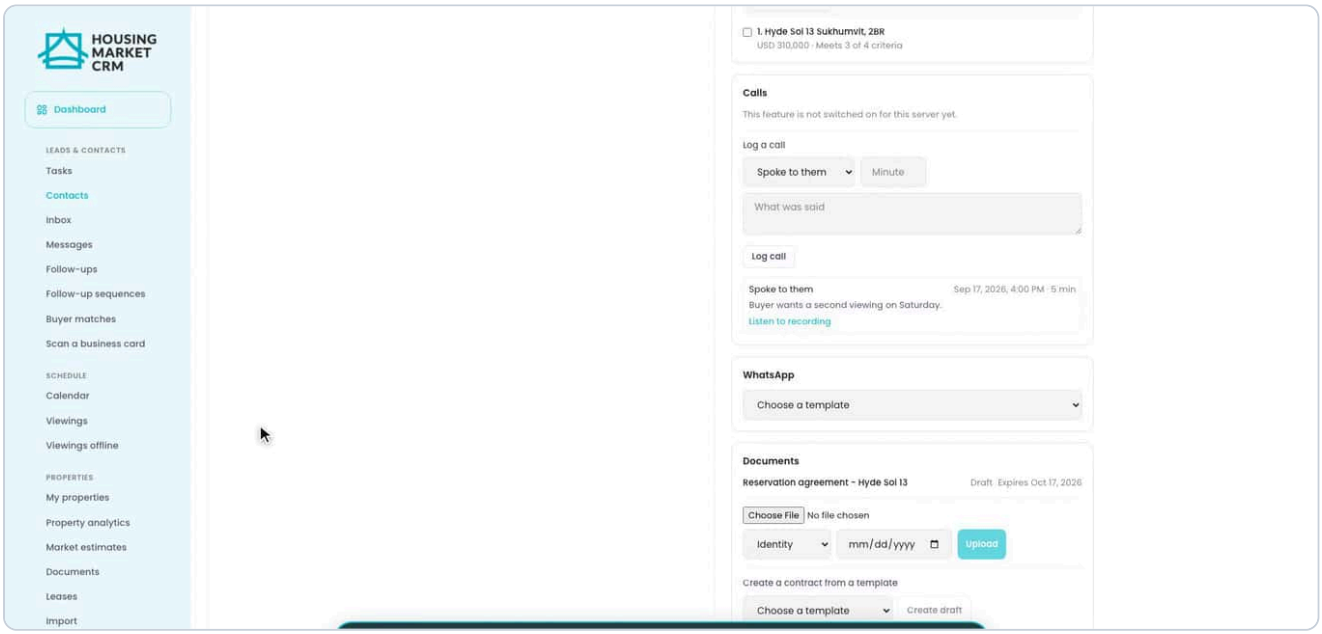


Figure 51.7 · Screen recorded 17 September 2026

8 The message is sent from **your own WhatsApp** number.

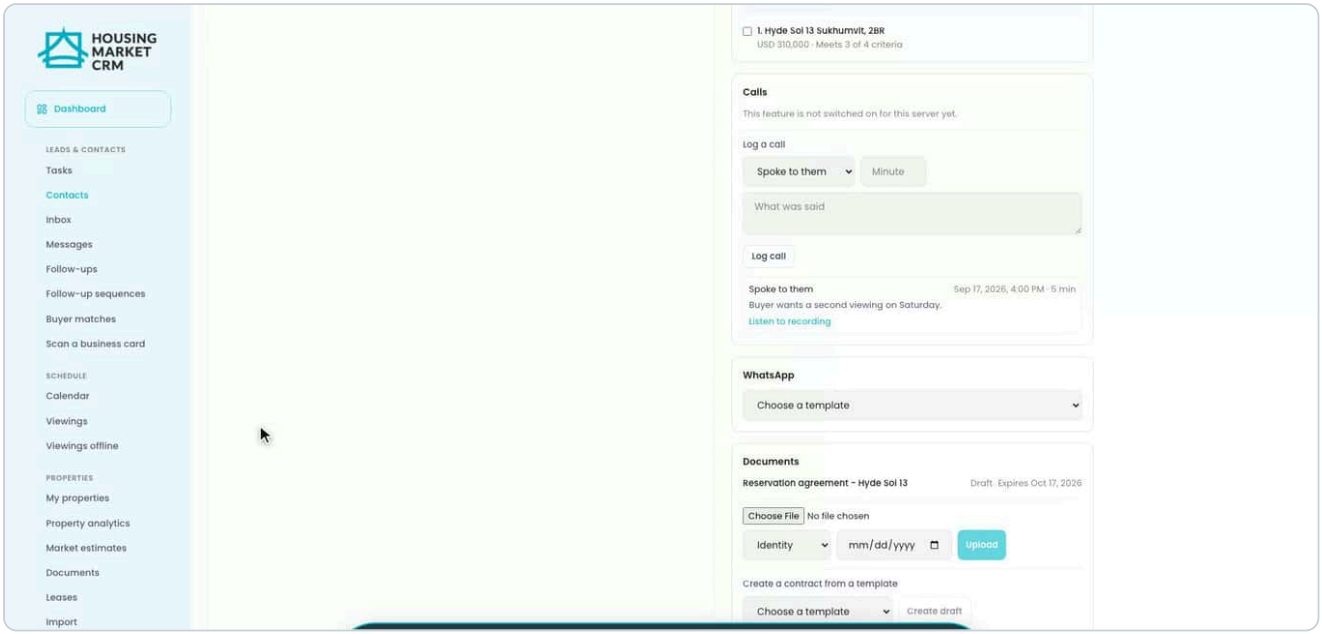


Figure 51.8 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

Can I track communication with buyers?	faq.housingmarketgroup.com/faq/can-i-track-communication-with-buyers

52 CHAPTER 52

WhatsApp templates

Pro and Business | For agents | Watch the video

OVERVIEW

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From the Help Center: **How do WhatsApp templates work?**

STEP BY STEP

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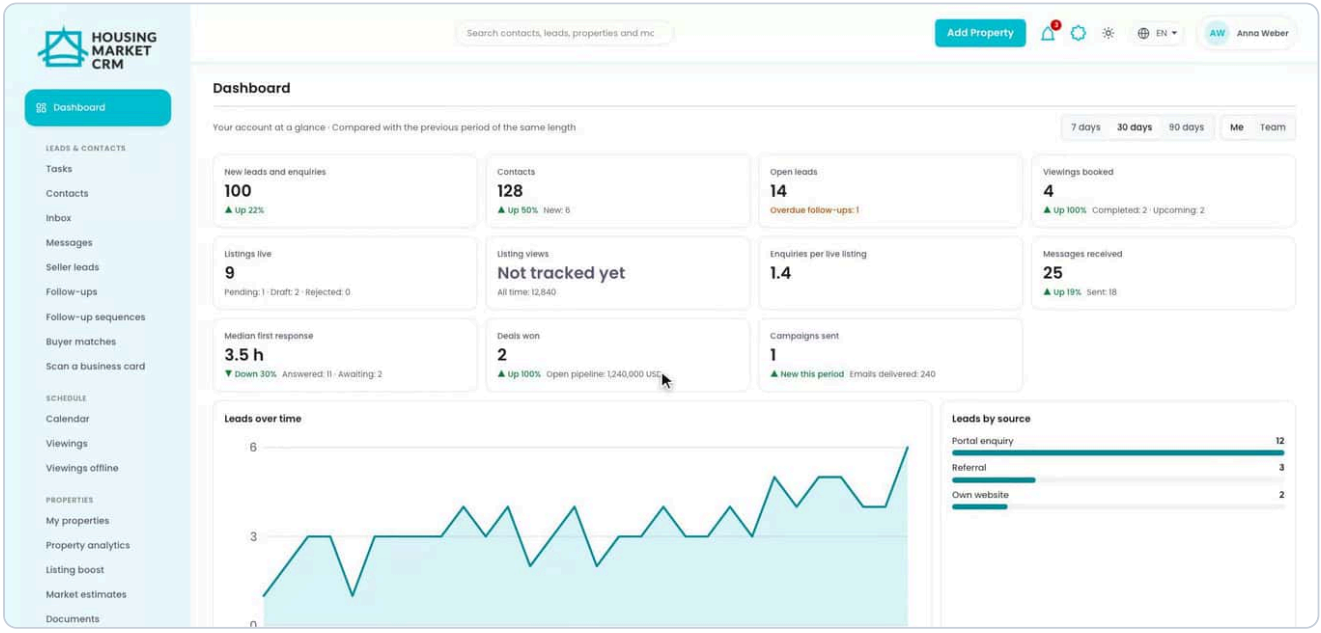


Figure 52.1 · Screen recorded 8 October 2026

2 Click **WhatsApp templates** in the left menu.

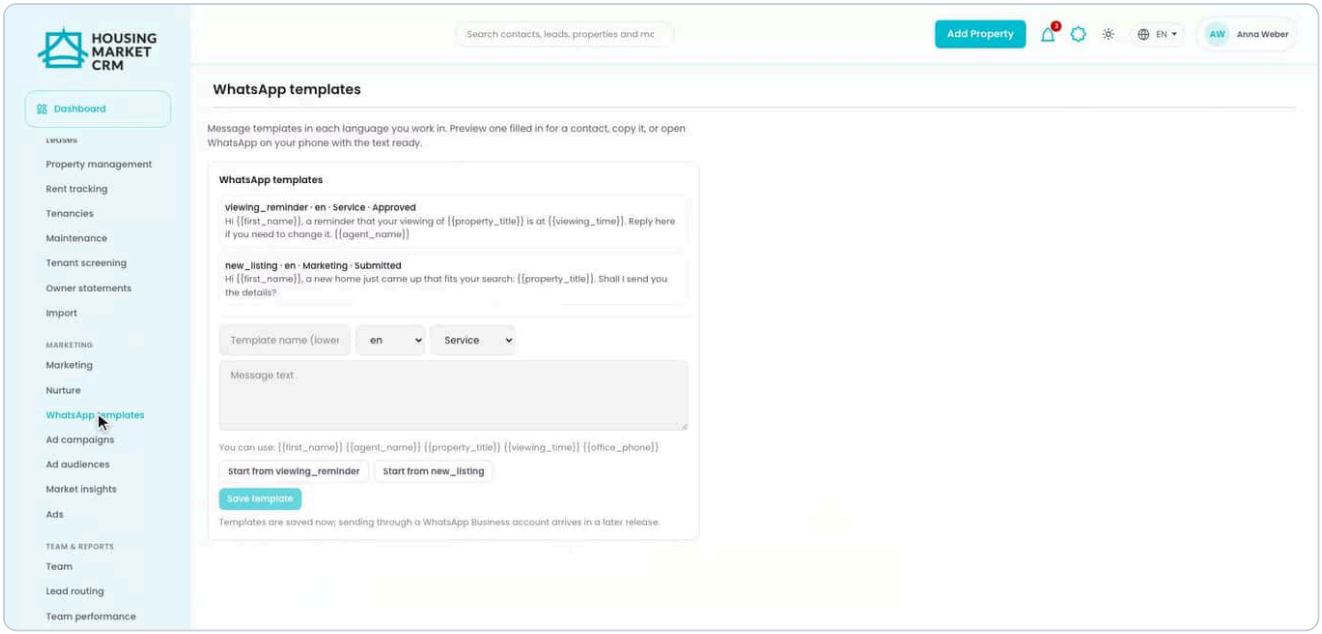


Figure 52.2 · Screen recorded 8 October 2026

3 Start from the **viewing reminder**.

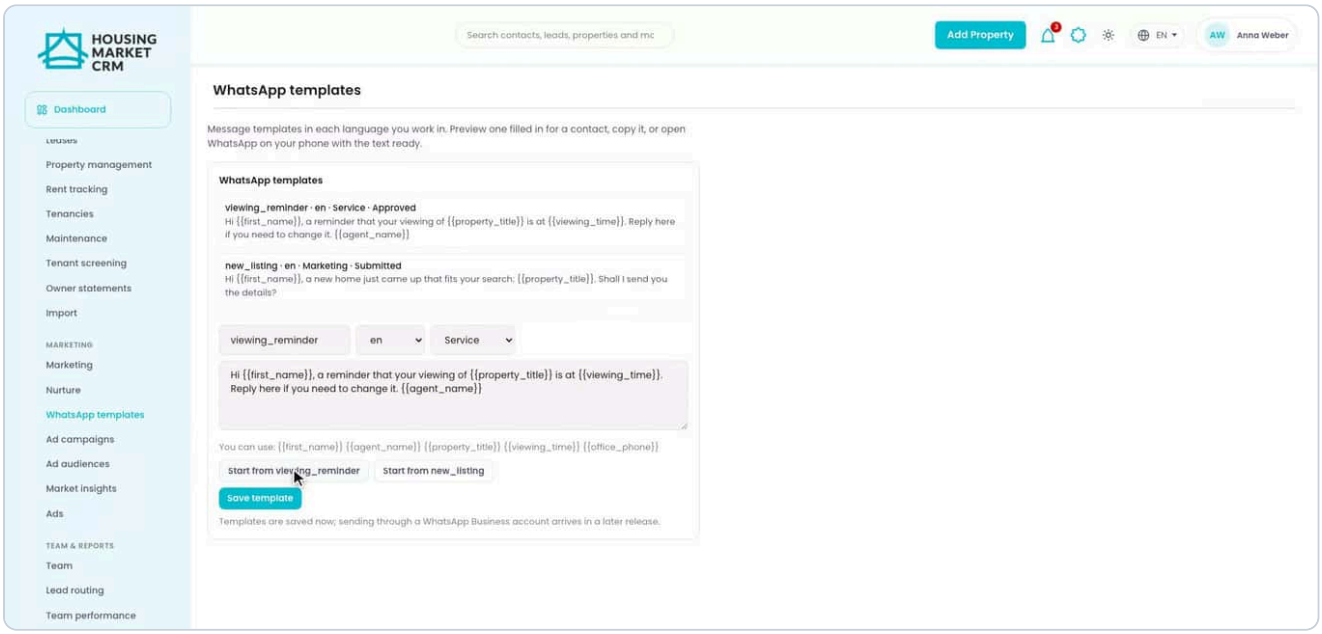


Figure 52.3 · Screen recorded 8 October 2026

4 Write it in **every language** you actually work in.

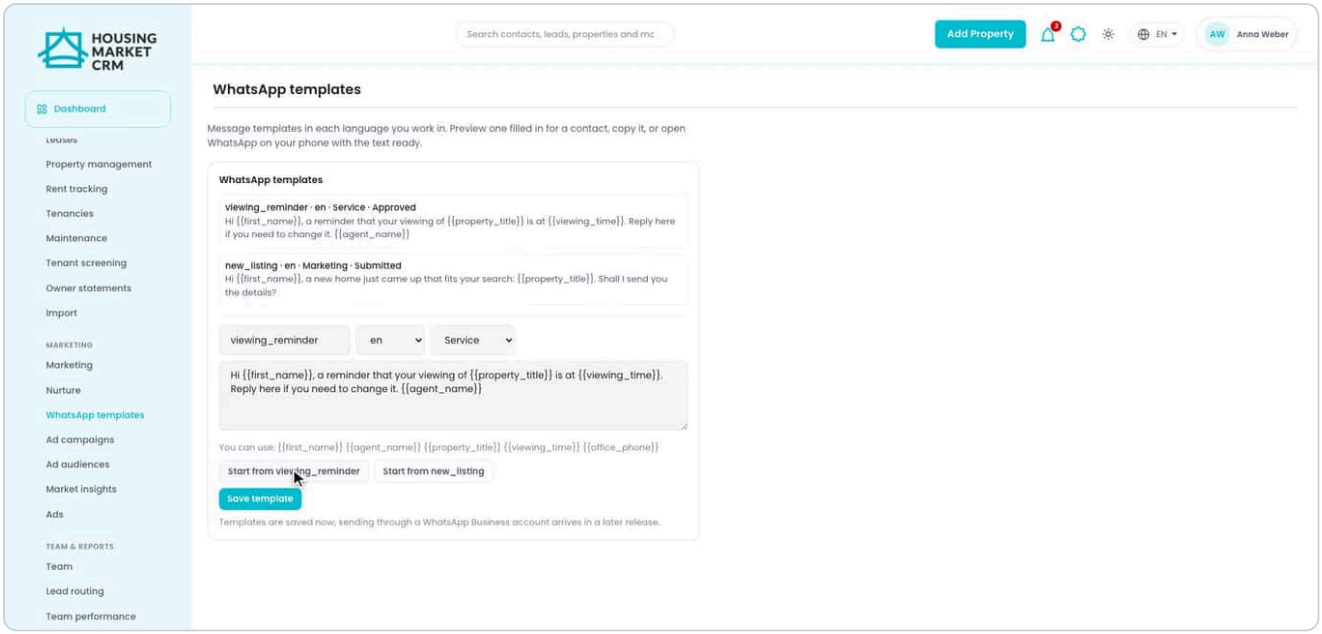


Figure 52.4 · Screen recorded 8 October 2026

5 Preview against a **real contact** — that is how you catch a clumsy placeholder.

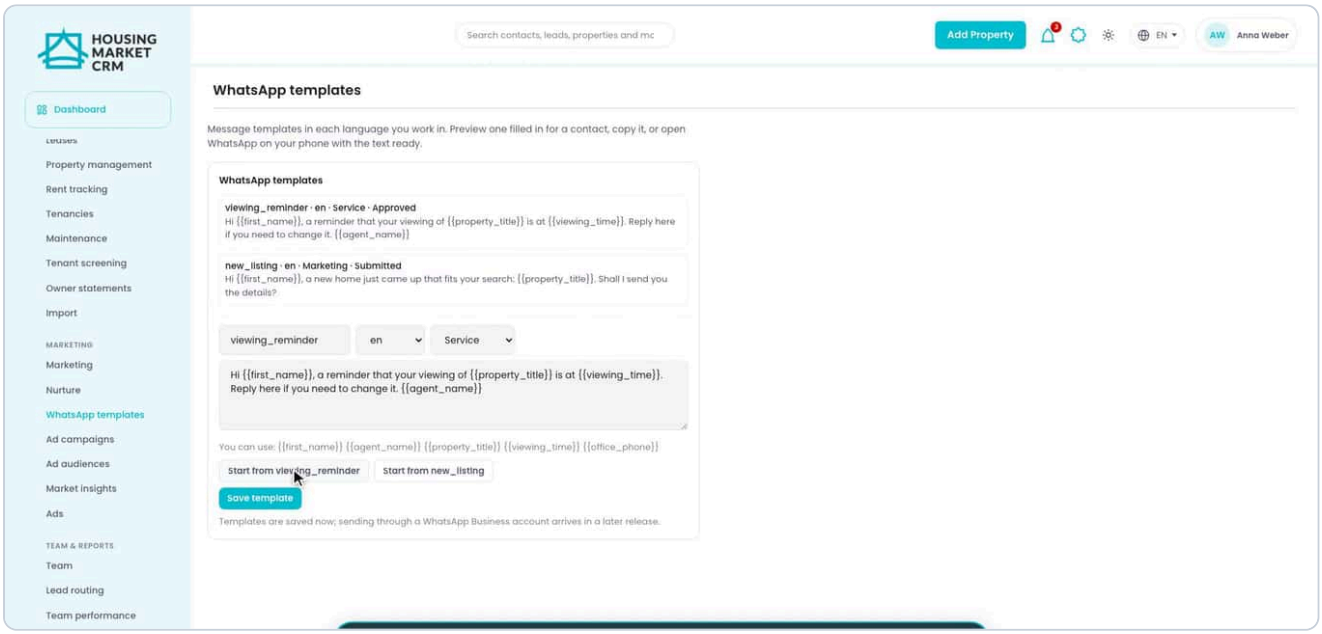


Figure 52.5 · Screen recorded 8 October 2026

6 Then **Save template.**

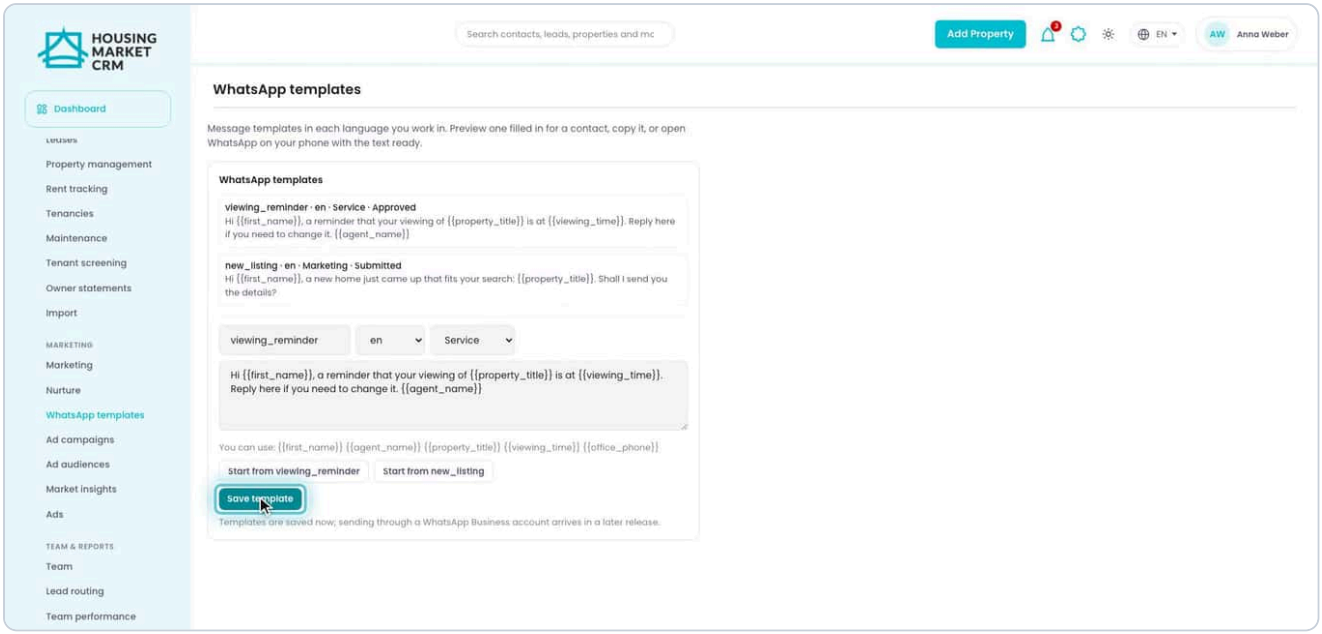


Figure 52.6 · Screen recorded 8 October 2026

7 The CRM hands **your phone** the text. The conversation stays in your WhatsApp.

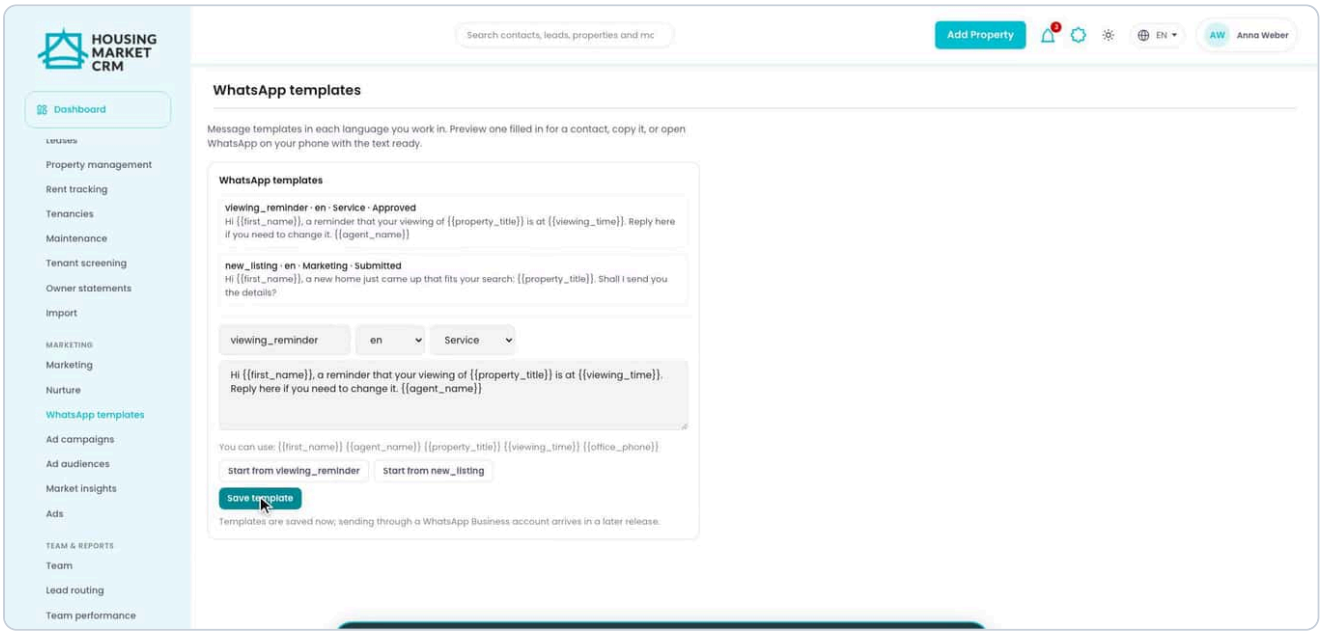


Figure 52.7 · Screen recorded 8 October 2026

8 A reminder is **two lines**: the address, and the time.

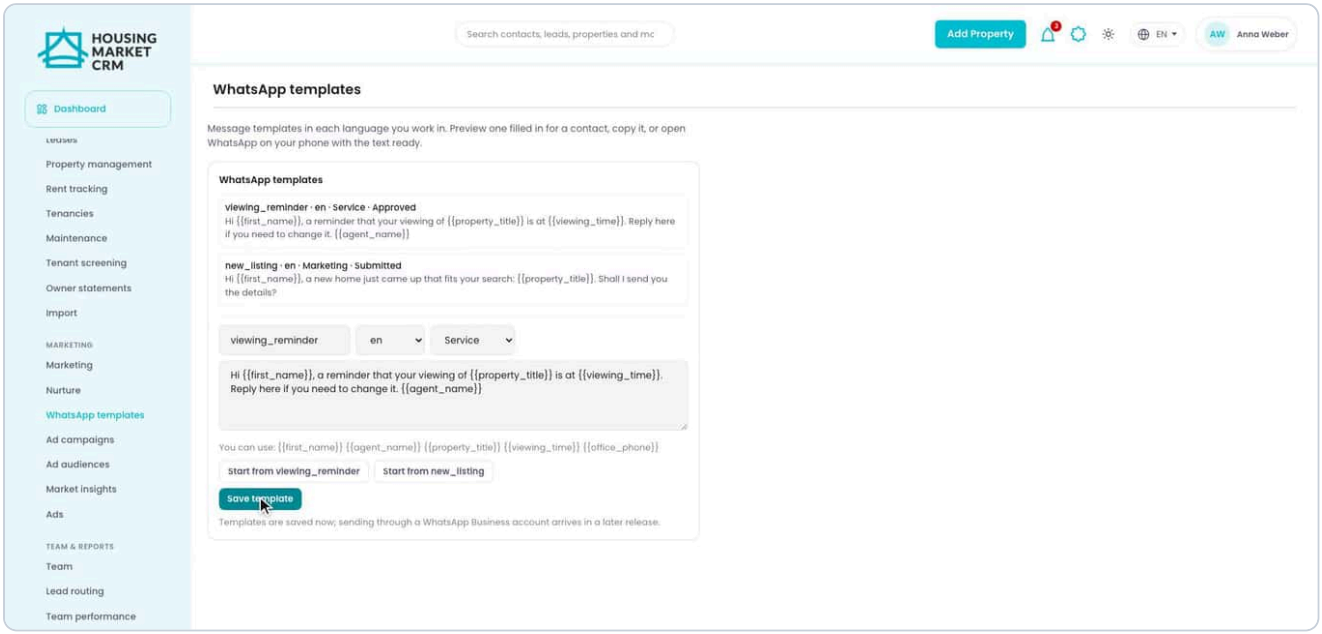


Figure 52.8 · Screen recorded 8 October 2026

9 A reminder in the wrong language reads as a mistake, not a courtesy.

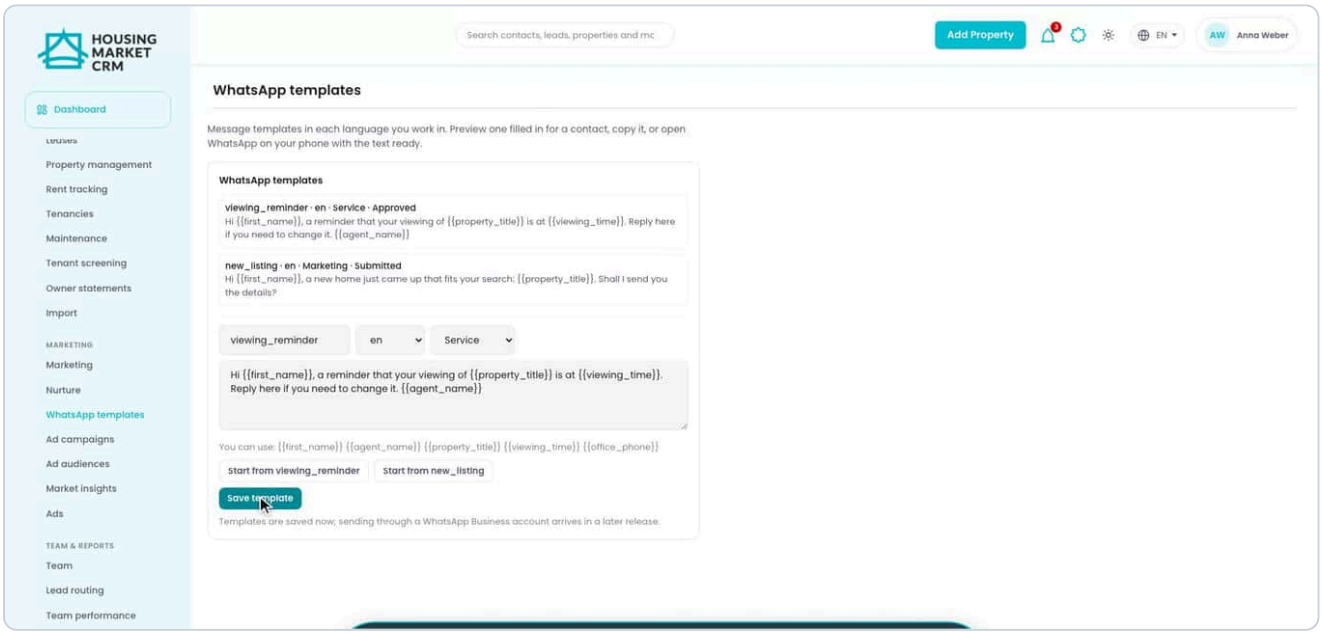


Figure 52.9 · Screen recorded 8 October 2026

53 CHAPTER 53

Send a bulk email

Pro and Business | For agents | Watch the video

OVERVIEW

On Pro, choose Marketing: upload your mailing list with consent recorded, build a campaign around your listings, send yourself a test, then send it now or schedule it.

Email campaigns are part of Pro. Choose Marketing in the left menu. The tabs Contacts, Campaigns and Suppressions are always there, and further tabs, such as Segments, Triggers, Launch kit and Results, appear when those Pro tools are open on your account. On Free the page explains the tool and offers Pro instead.

Your mailing list

The Contacts tab is your mailing list and shows who on it can be emailed. To add people, upload a contact list — a CSV, TSV or semicolon-separated file; save an Excel workbook as CSV first — and confirm which column is the email address, first name, last name and phone before anything is saved.

Tick These people agreed to hear from me and say where they agreed, such as a sign-up form or a viewing sheet. Only contacts with consent are ever emailed: without it they are saved but never sent a campaign, and you can record consent later.

Building a campaign

- Open the Campaigns tab and choose New campaign.
- Give it a name, which only you see, and a subject line, which is what the recipient sees in their inbox. Preview text and an opening message are optional.
- Choose Add a listing to feature your properties. Each card is read from the portal rather than from a saved copy, so it shows the listing as it currently is.
- Choose Save the campaign. Open it to see the preview, and choose Send myself a test to see it in your own inbox; a test is not counted in the results.

Sending it

Under Send this campaign, choose Send now, or set a time and choose Schedule it. Before you send, the screen shows how many people can be emailed and how many cannot, and why: no consent, unsubscribed, or suppressed. A scheduled campaign can be edited or cancelled until it starts sending; cancelling makes it a draft again.

Campaigns are sent from Housing Market Group's own verified address with your name on them, so there is no domain or DNS set-up on your side. Every email carries an unsubscribe link, and Results shows how many were sent, opened, clicked, bounced, marked as spam, failed or suppressed.

Suppressions

Suppressions lists the addresses nobody may email: addresses that do not exist, that marked a campaign as spam, or that unsubscribed, and any you added by hand. The list is shared across the whole platform, because everyone sends from one verified address. To add an address for someone who asked not to be emailed, choose Add an address, type it and, if you like, why. You confirm that it applies to every agent, not only to you: nobody on the platform can email it from then on, including campaigns already scheduled.

You can take back an address you added by hand: choose Remove next to it and confirm. You can remove an address you added, and so can a manager in your office. An address someone else added shows Added by someone else instead of a button, and an address that has since bounced, been marked as spam or unsubscribed stays on the list. Addresses that do not exist, that marked a campaign as spam or that unsubscribed cannot be taken off the list from the CRM, because they are the decision of the mail server or of the person, and writing to them again is what produces the next complaint.

From the Help Center: **How do I send an email campaign to my contacts?**

STEP BY STEP

1. Open your **Housing Market CRM** account.

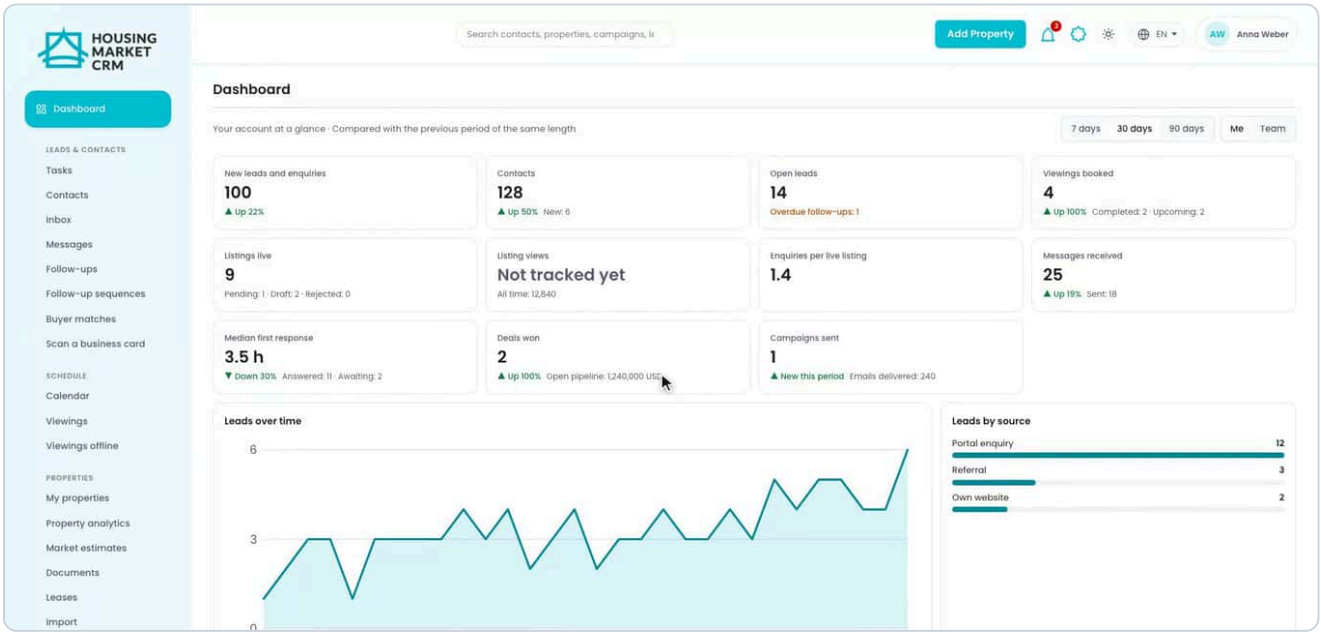


Figure 53.1 · Screen recorded 17 September 2026

2 Click **Marketing** in the left menu.

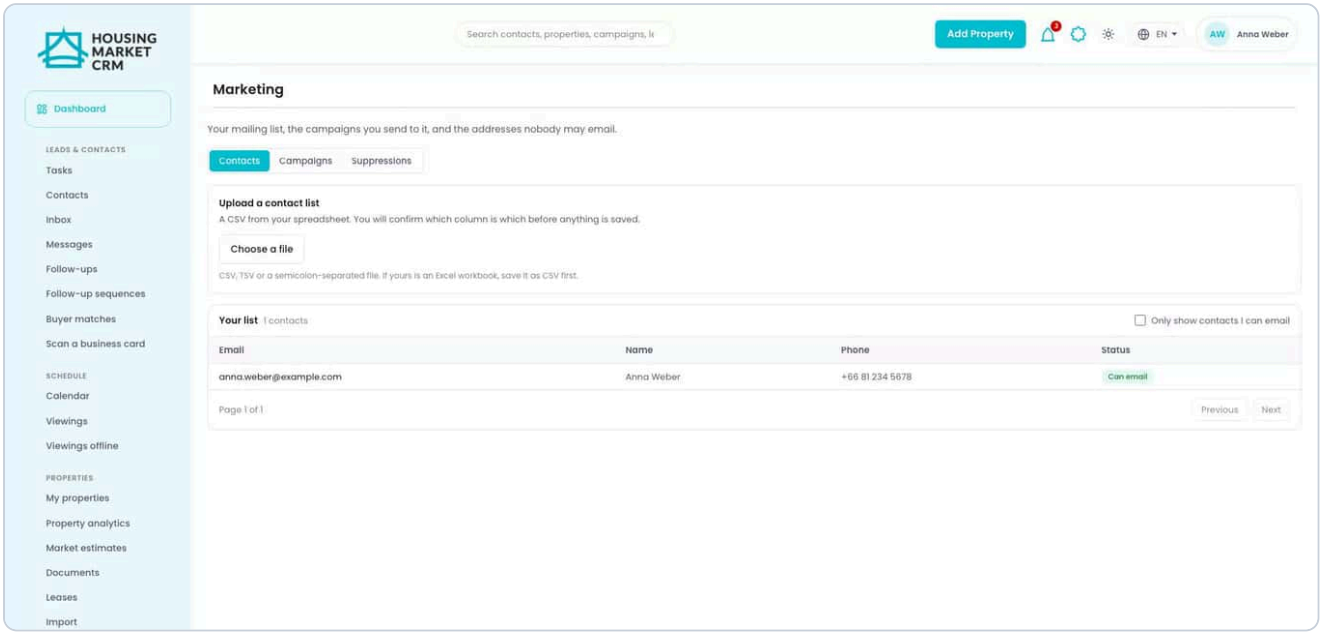


Figure 53.2 · Screen recorded 17 September 2026

3 Your **mailing list** shows who can be emailed.

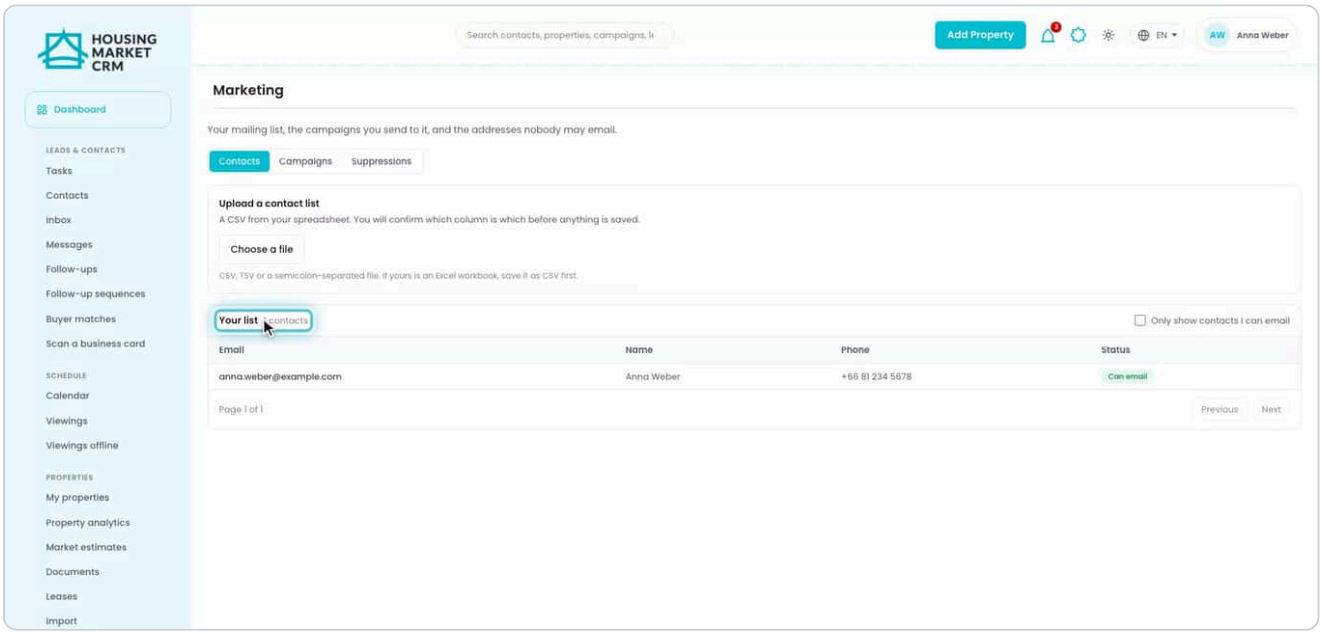


Figure 53.3 · Screen recorded 17 September 2026

4 Open the **Campaigns** tab.

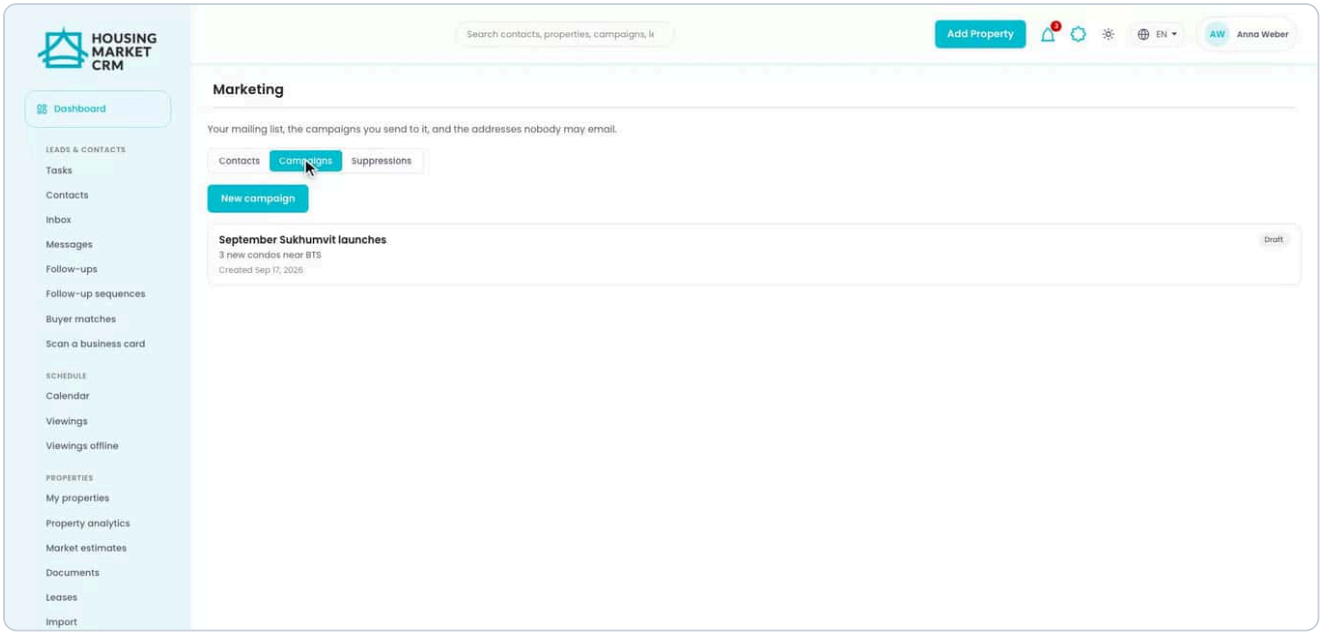


Figure 53.4 · Screen recorded 17 September 2026

5 Click **New campaign**.

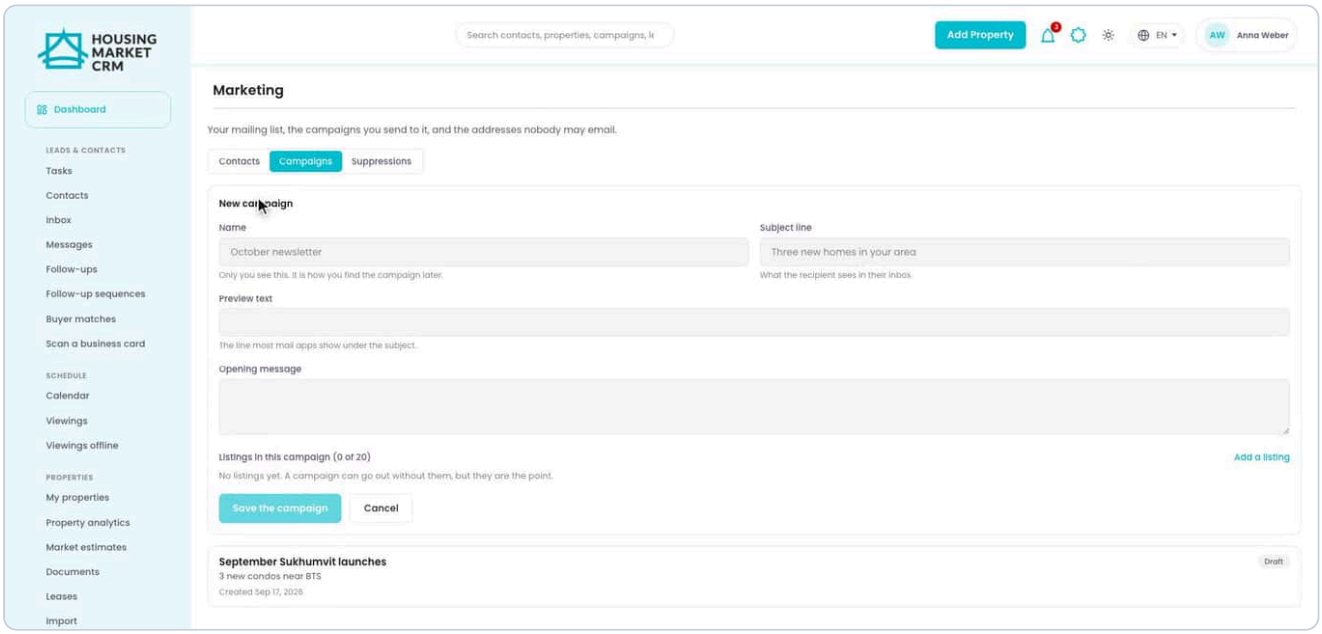


Figure 53.5 · Screen recorded 17 September 2026

6 Give the campaign a **name**.

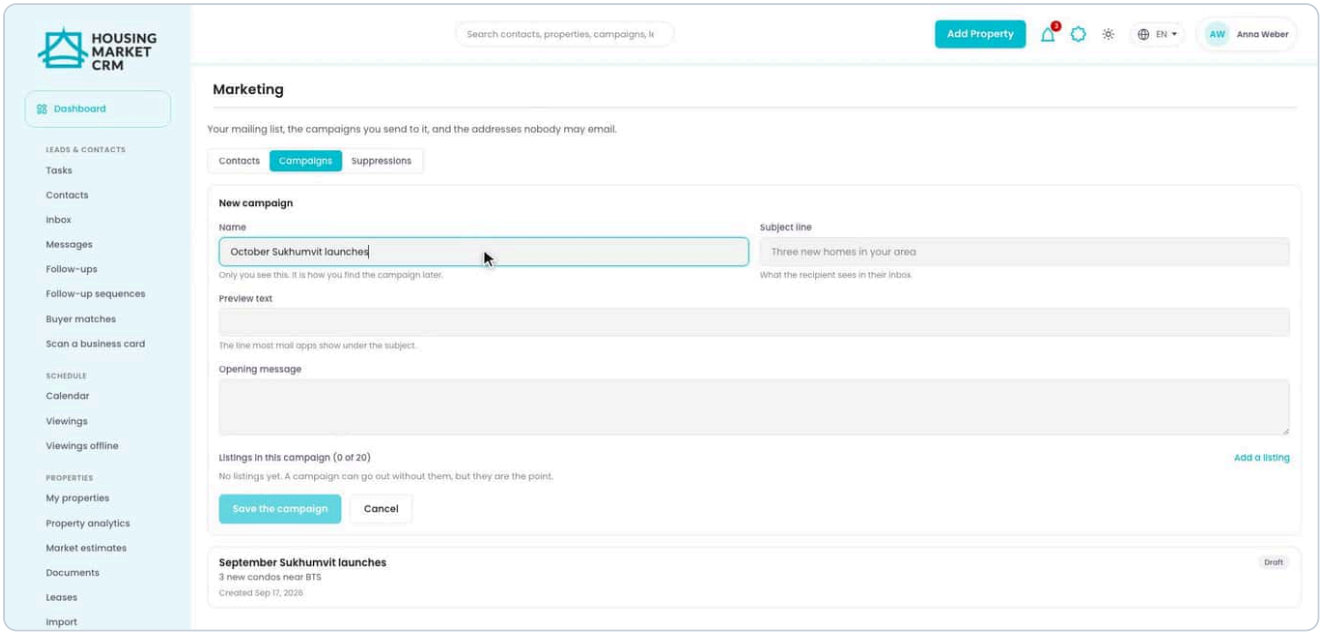


Figure 53.6 · Screen recorded 17 September 2026

7 Write a clear **subject line**.

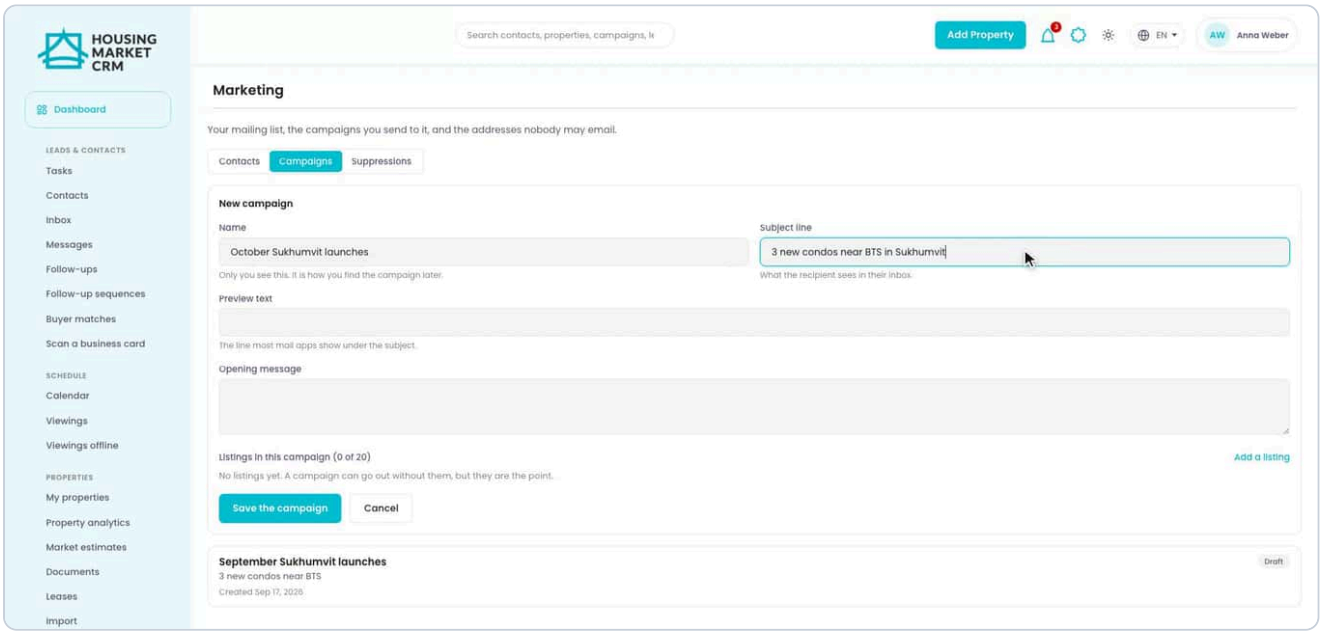


Figure 53.7 · Screen recorded 17 September 2026

8 Use **Add a listing** to feature a property.

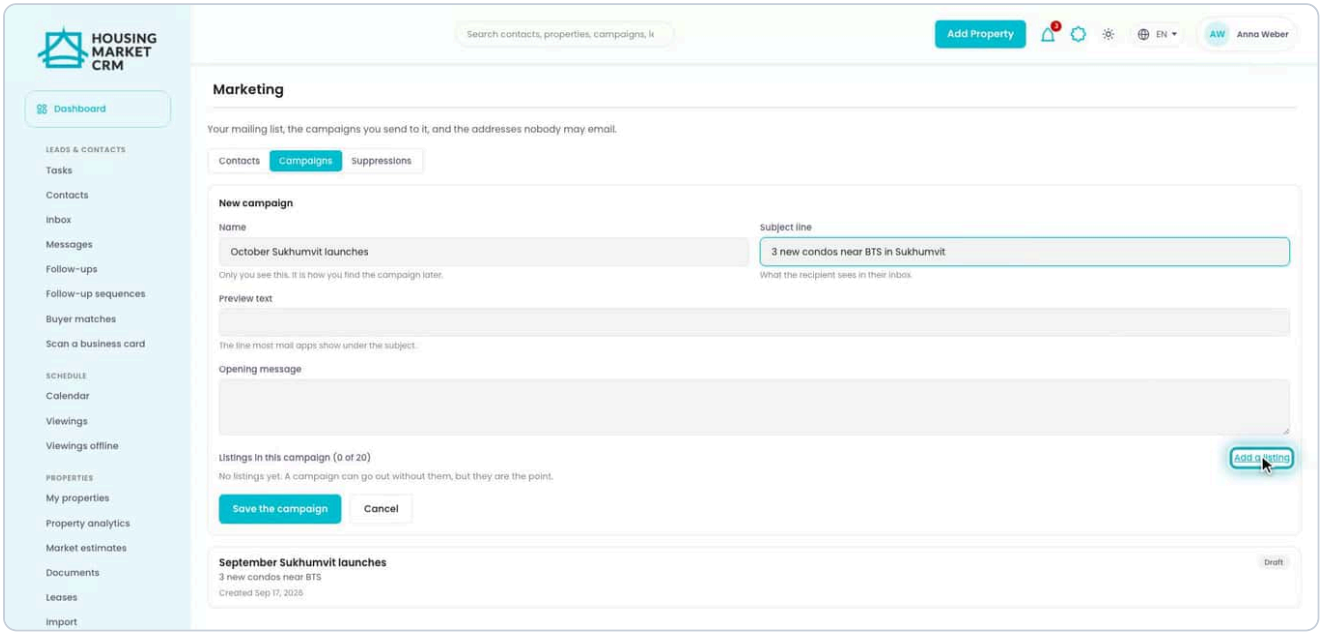


Figure 53.8 · Screen recorded 17 September 2026

9 Choose **when to send**, then save the campaign.

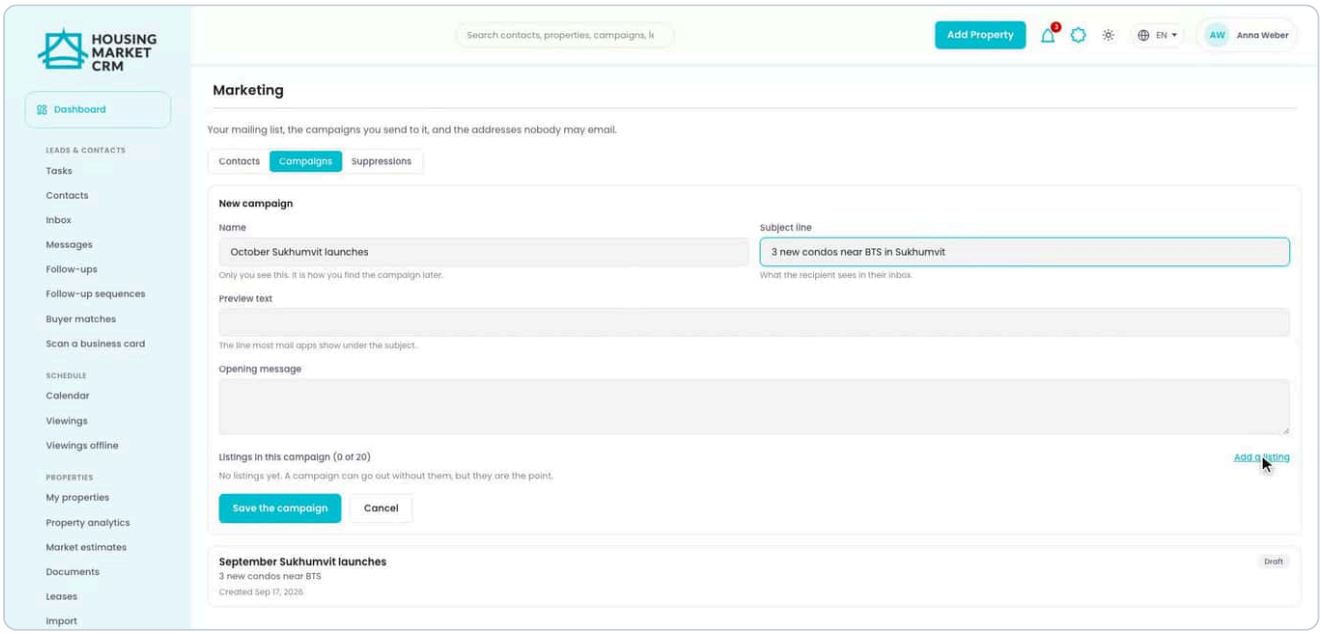


Figure 53.9 · Screen recorded 17 September 2026

10 **Suppressions** lists addresses that must not be emailed.

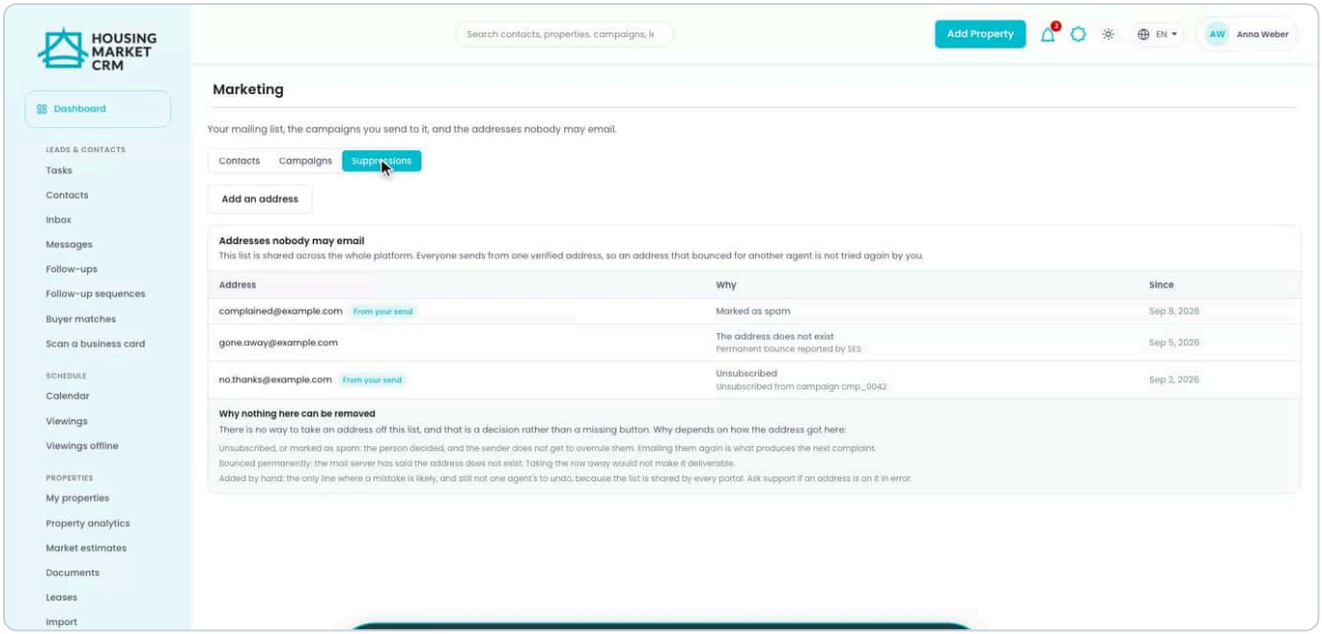


Figure 53.10 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

What is Housing Market CRM?	faq.housingmarketgroup.com/faq/what-is-housing-market-crm
How does nurture work?	faq.housingmarketgroup.com/faq/how-does-nurture-work

54 CHAPTER 54

The notification centre

All plans | For agents | Watch the video

OVERVIEW

Under the bell at the top of the screen. A red counter shows how many are unread; choose one to open what it is about, or choose Mark all read.

The bell at the top of the CRM opens your notifications, newest first, with a red counter for the unread ones. They include new enquiries, leads assigned to you, leads that have gone quiet, follow-ups that are due or overdue, viewings coming up, and listings published to the portal or refused.

Choose a notification to open the lead, property or calendar page it is about; that also marks it read. Mark all read clears the counter.

Read and unread are kept on your account, not in the browser, so a notification you read on your computer is read on your phone too.

What reaches the bell, and what is also emailed to you, is set per event under Settings (the gear) → Notification preferences. See "Does the CRM include reminders?".

From the Help Center: **Where do I see my notifications in the CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

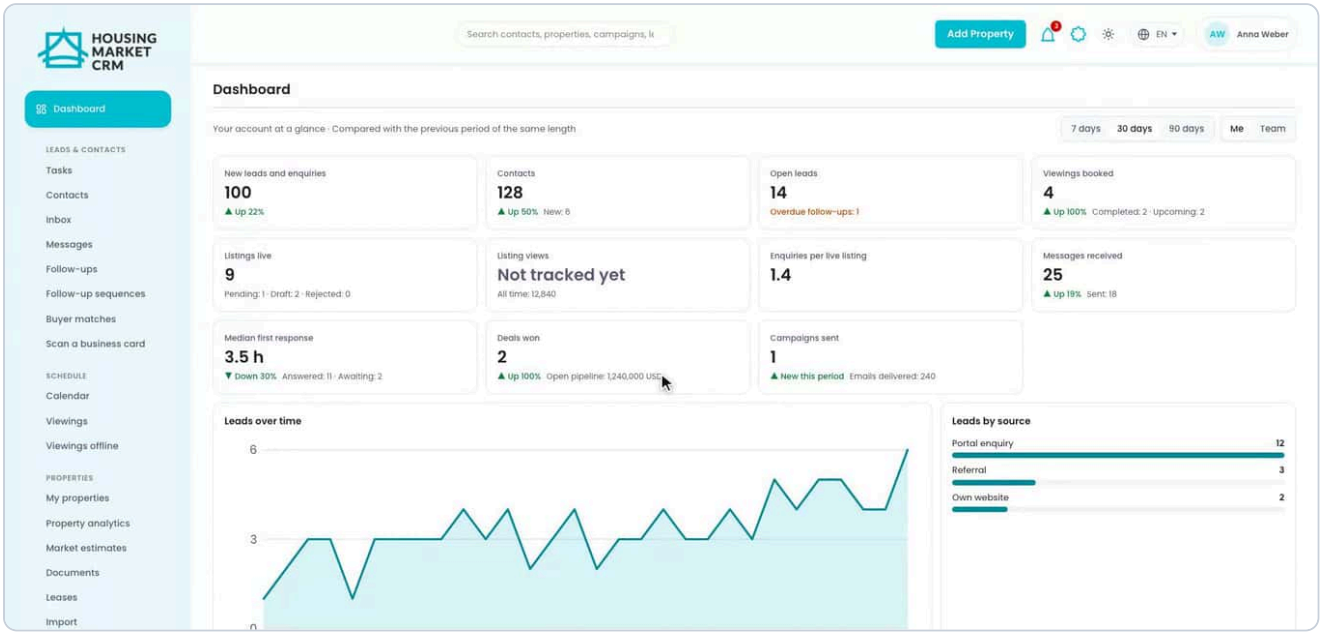


Figure 54.1 · Screen recorded 17 September 2026

2 The **red counter** shows unread notifications.

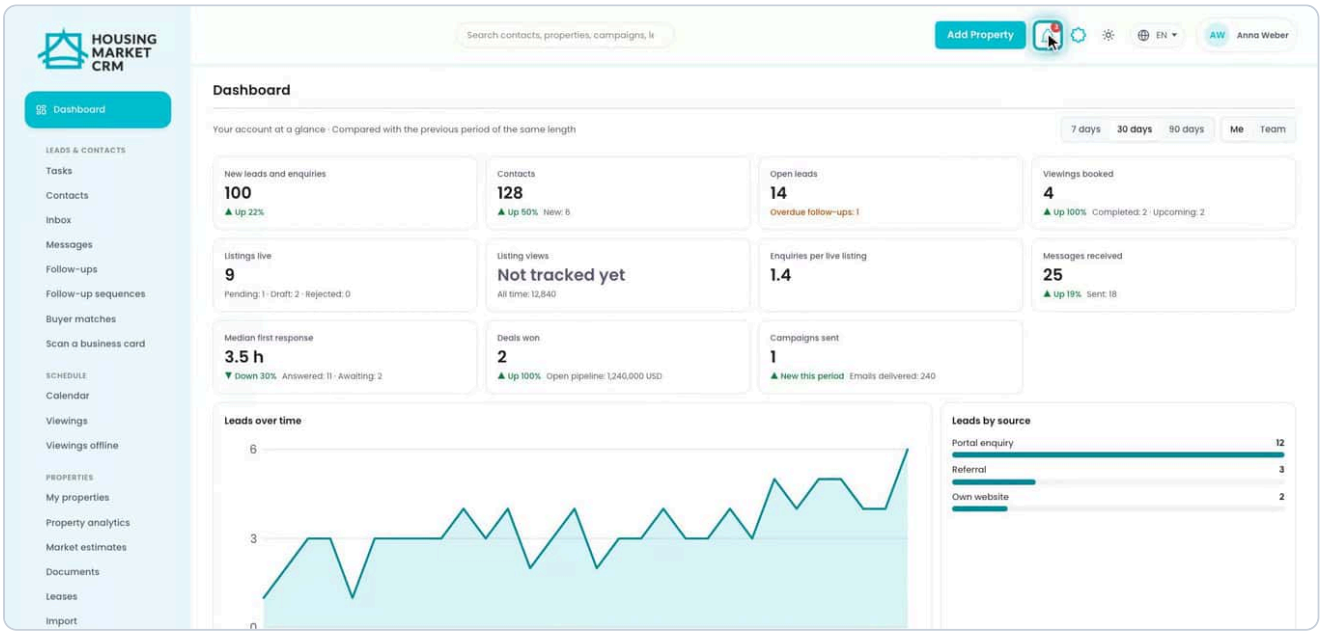


Figure 54.2 · Screen recorded 17 September 2026

3 Click the **bell**.

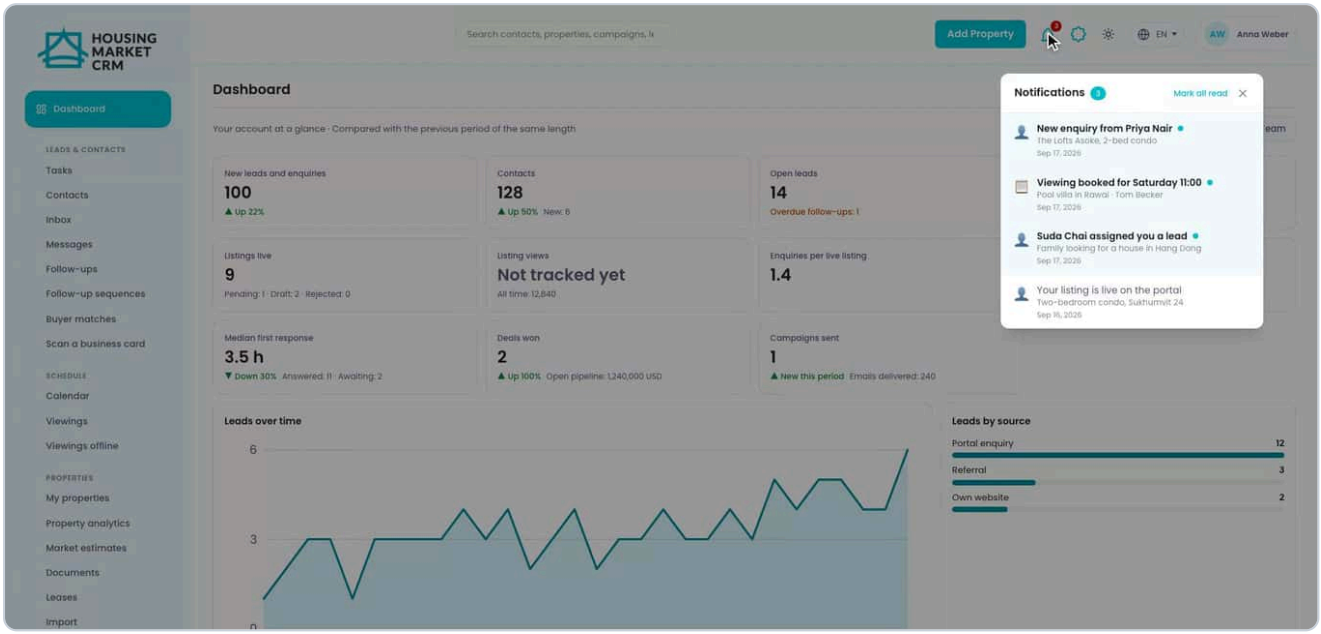


Figure 54.3 · Screen recorded 17 September 2026

4 New enquiries, booked viewings, assigned leads and live listings.

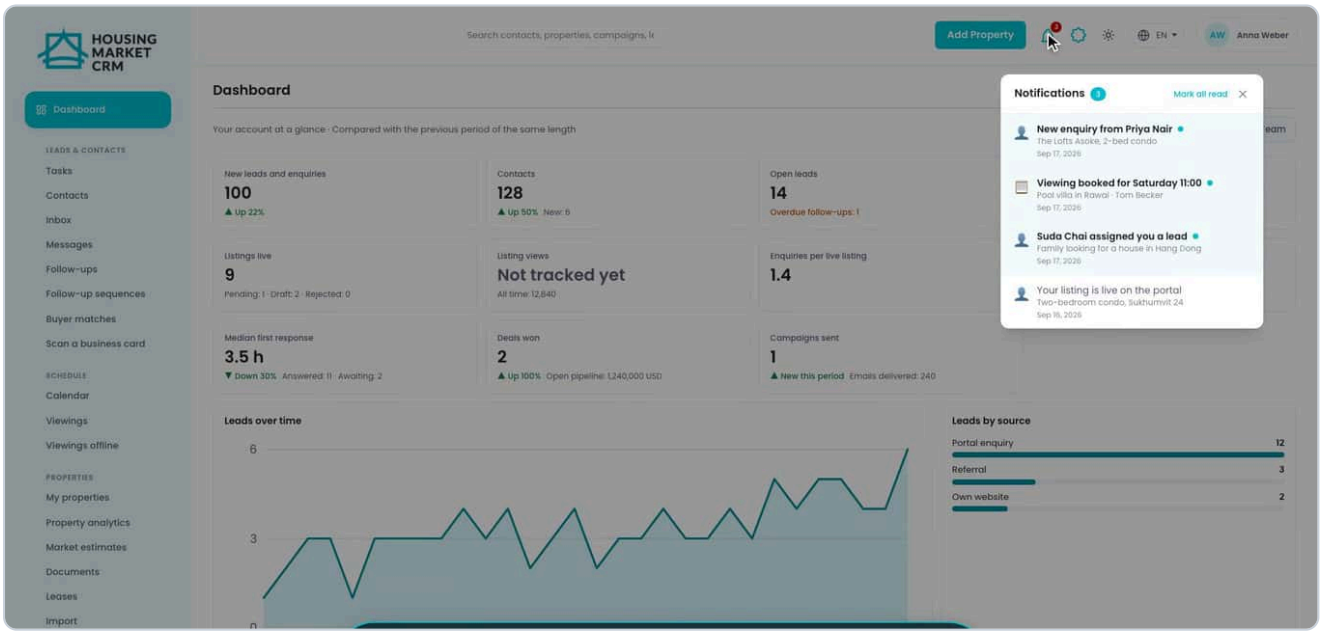


Figure 54.4 · Screen recorded 17 September 2026

5 Click an item to open the **lead** it is about.

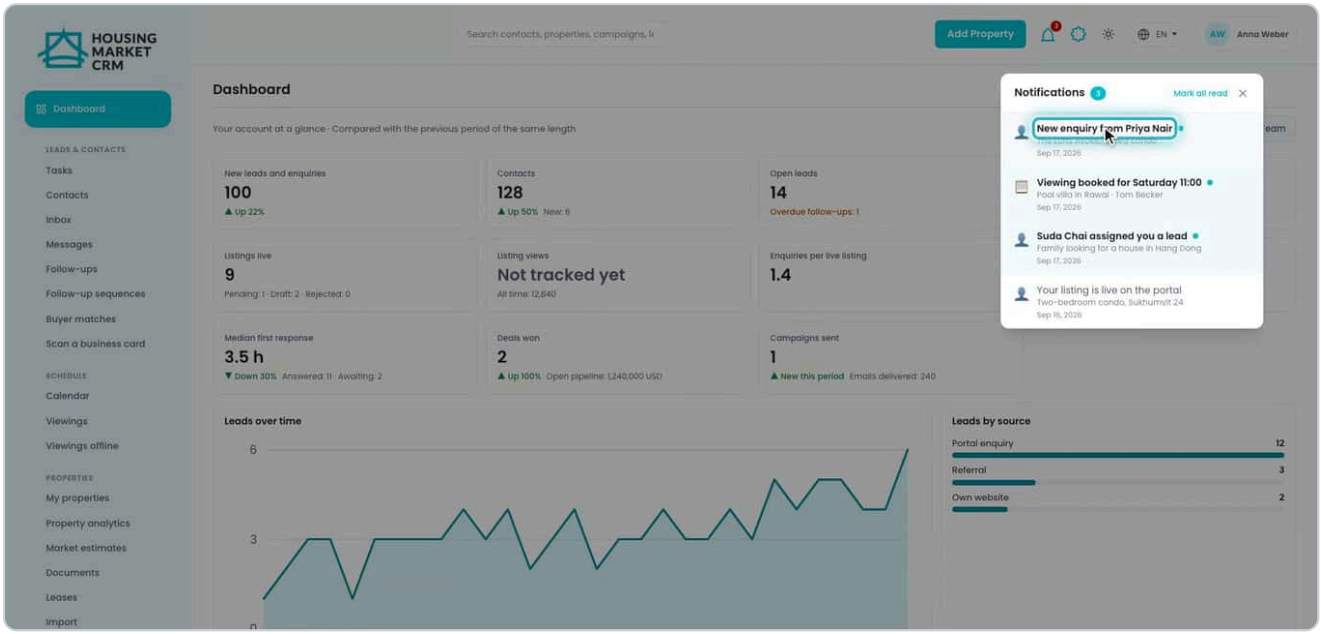


Figure 54.5 · Screen recorded 17 September 2026

6 Click **Mark all read** when you are done.

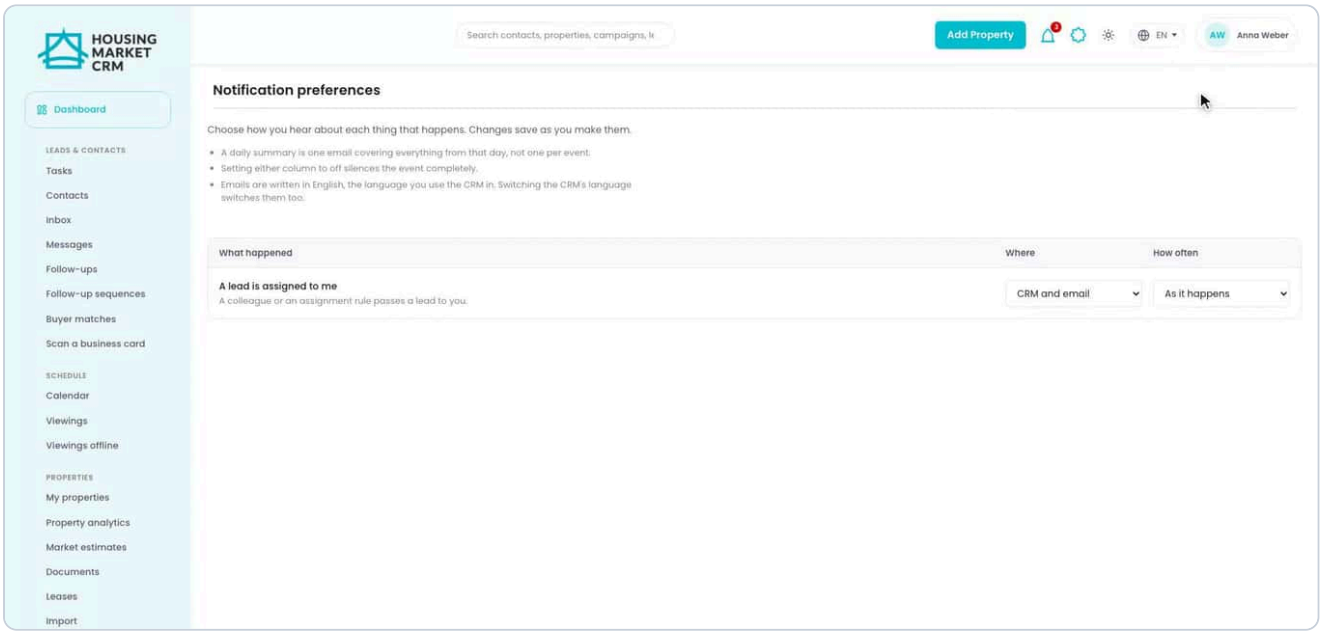


Figure 54.6 · Screen recorded 17 September 2026

7 Set what reaches you by **email** in Notification preferences.

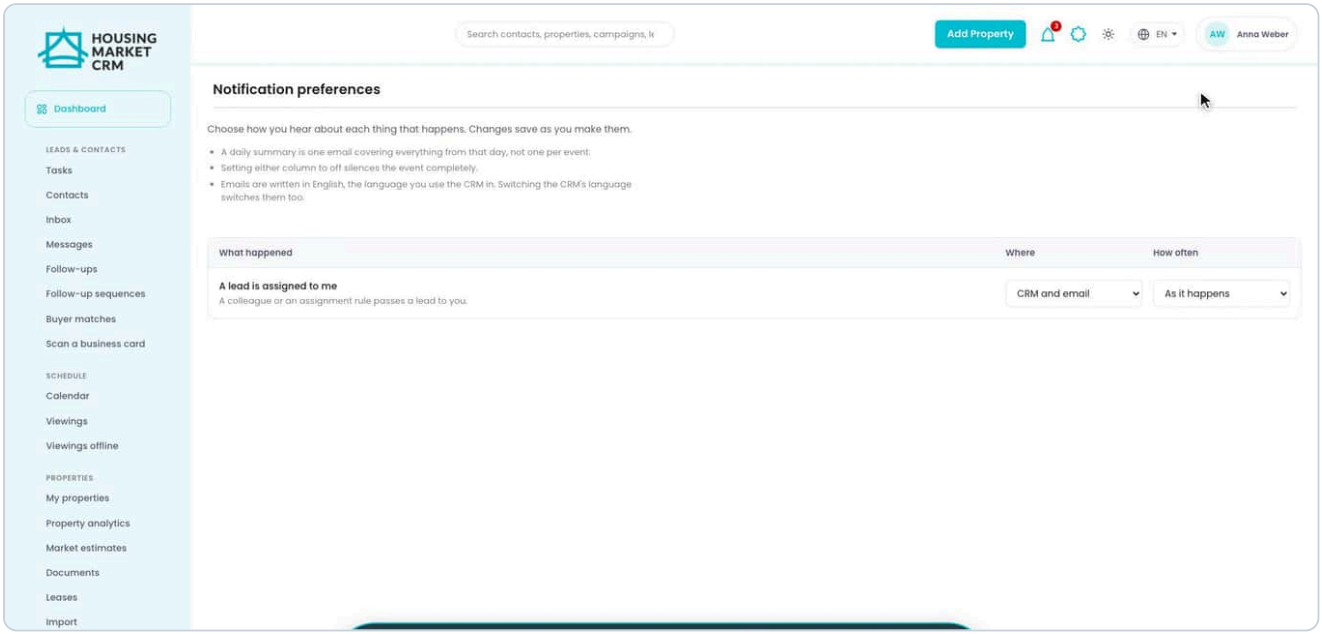


Figure 54.7 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

Does the CRM include reminders?	faq.housingmarketgroup.com/faq/does-the-crm-include-reminders
Which language are my CRM notification emails in?	faq.housingmarketgroup.com/faq/which-language-are-my-notification-emails-in

55 CHAPTER 55

Email notifications

All plans | For agents | Watch the video

OVERVIEW

Yes. A follow-up reminds you when it falls due, unless you untick "Remind me when it is due", and the CRM notifies you again if it is still open a day later.

Give a follow-up a due date and time. "Remind me when it is due" starts ticked: leave it and you are notified at that moment; untick it and there is no due notification. Either way, a follow-up still open a day after its due time raises an overdue notification. Each fires exactly once rather than repeating until it is dealt with. There is no reminder ahead of the due time; to hear about it earlier, set the due time earlier.

Notifications are set per event rather than with one switch for all of them: a new enquiry, a lead assigned to you, a lead that has gone quiet, a follow-up due or overdue, a viewing coming up, a listing published or refused. Each can be in the CRM, by email, both or off, and can arrive as it happens or once a day as a summary. Set them under Settings (the gear) → Notification preferences.

From the Help Center: **Does the CRM include reminders?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

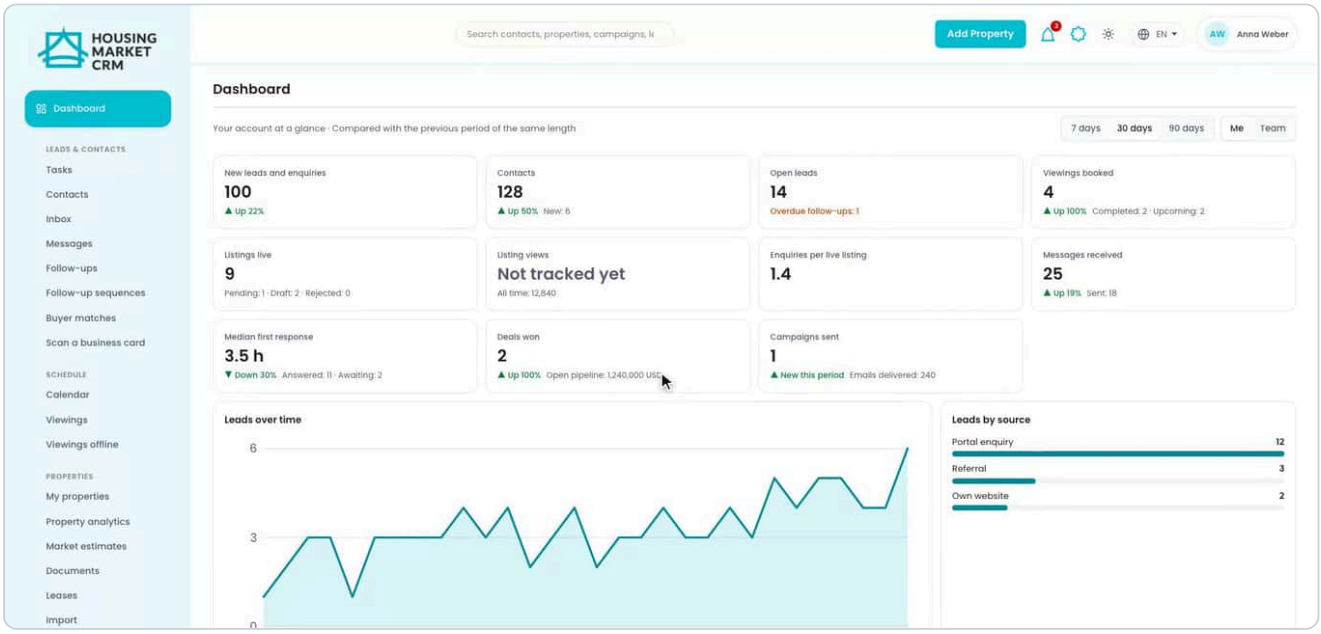


Figure 55.1 · Screen recorded 17 September 2026

2 Click the **Settings** icon at the top.

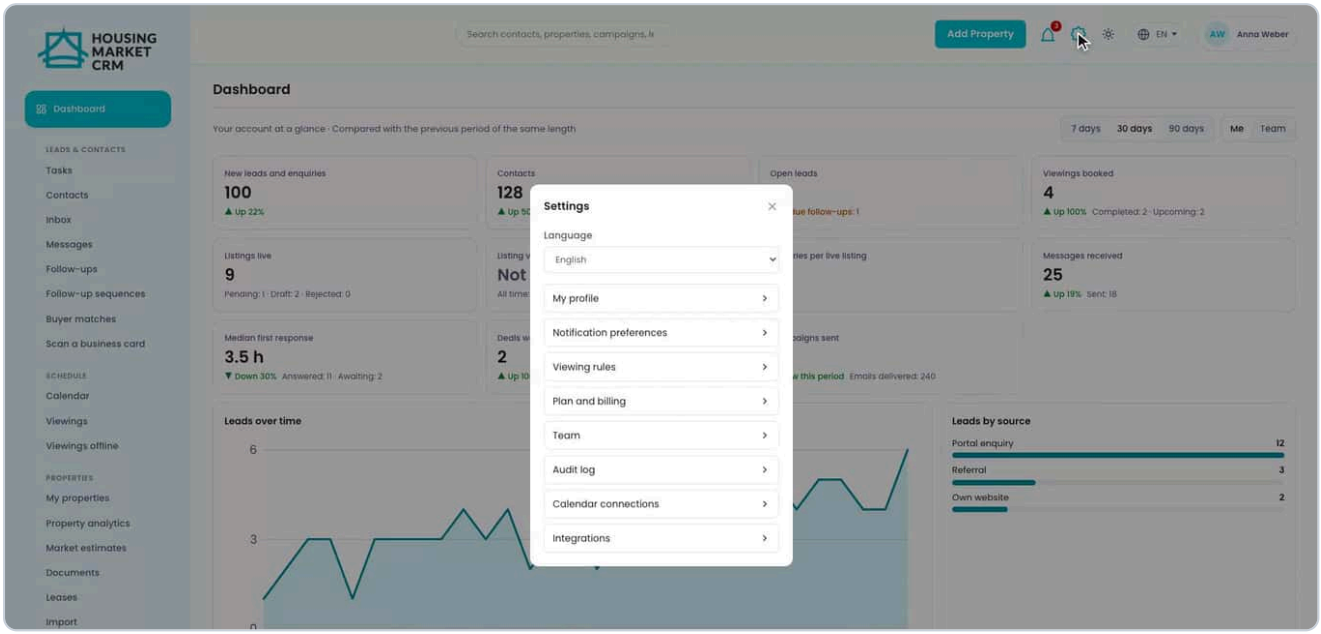


Figure 55.2 · Screen recorded 17 September 2026

3 Choose **Notification preferences**.

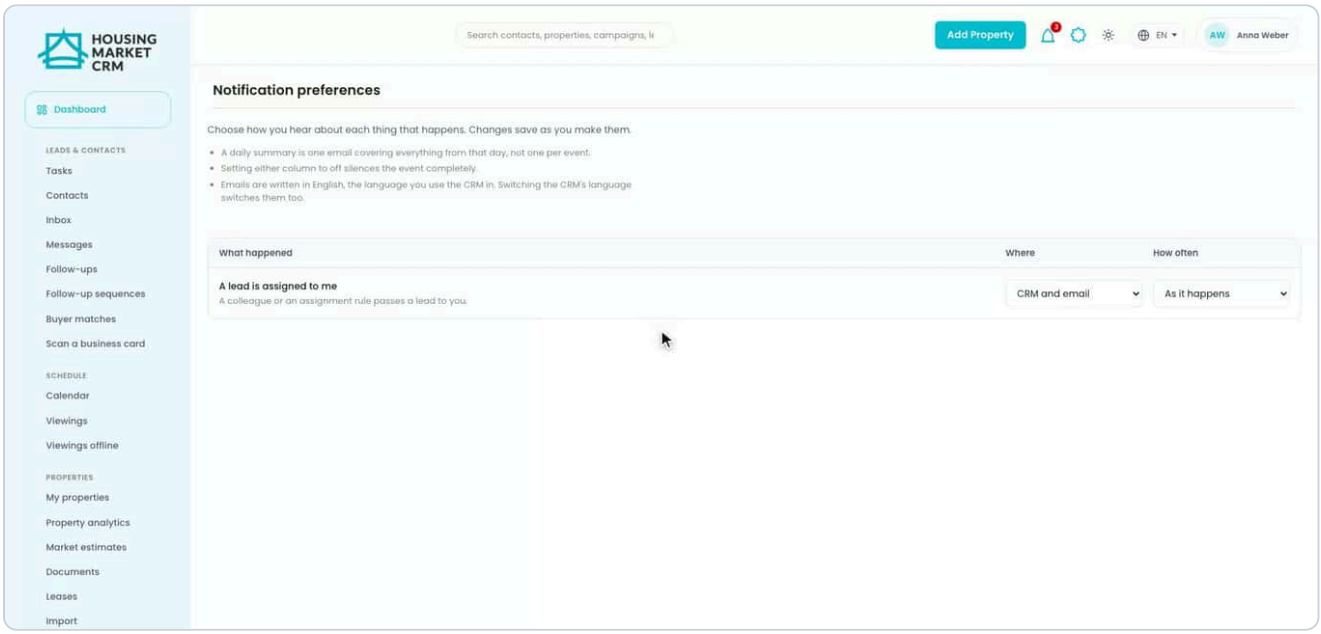


Figure 55.3 · Screen recorded 17 September 2026

4 For each event, choose **where** it reaches you for example **CRM and email**.

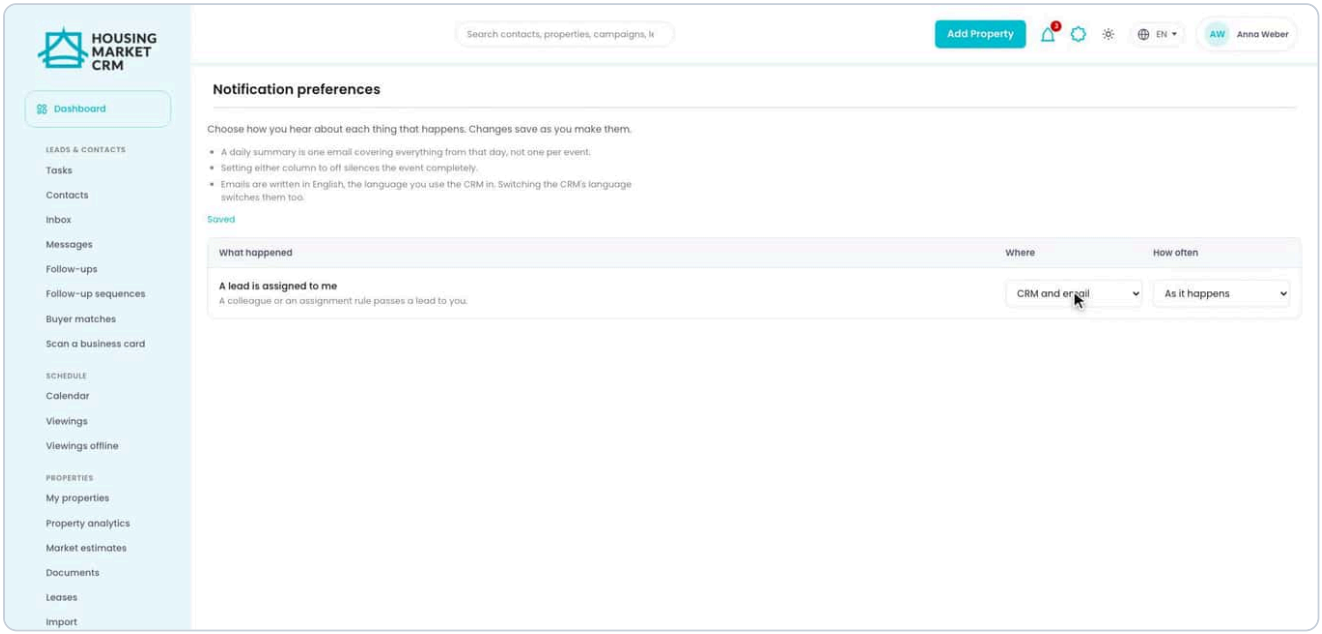


Figure 55.4 · Screen recorded 17 September 2026

5 Then choose **how often**: as it happens or a **daily summary**.

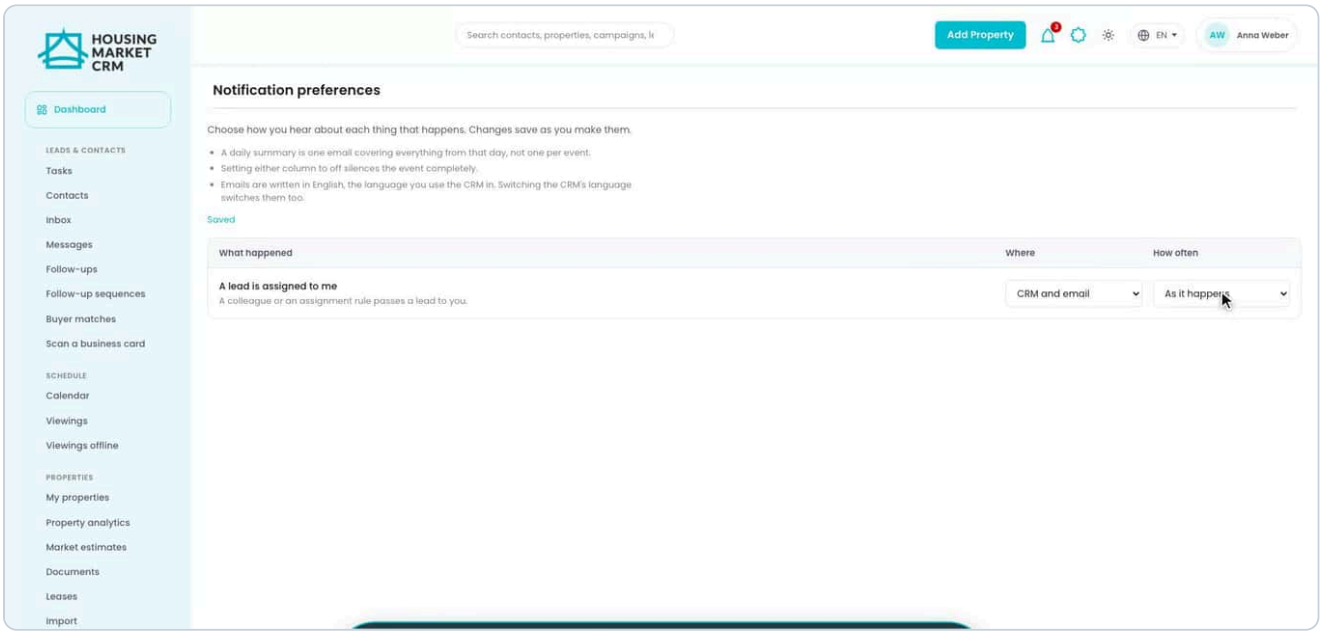


Figure 55.5 · Screen recorded 17 September 2026

6 Changes are **saved as you make them**.

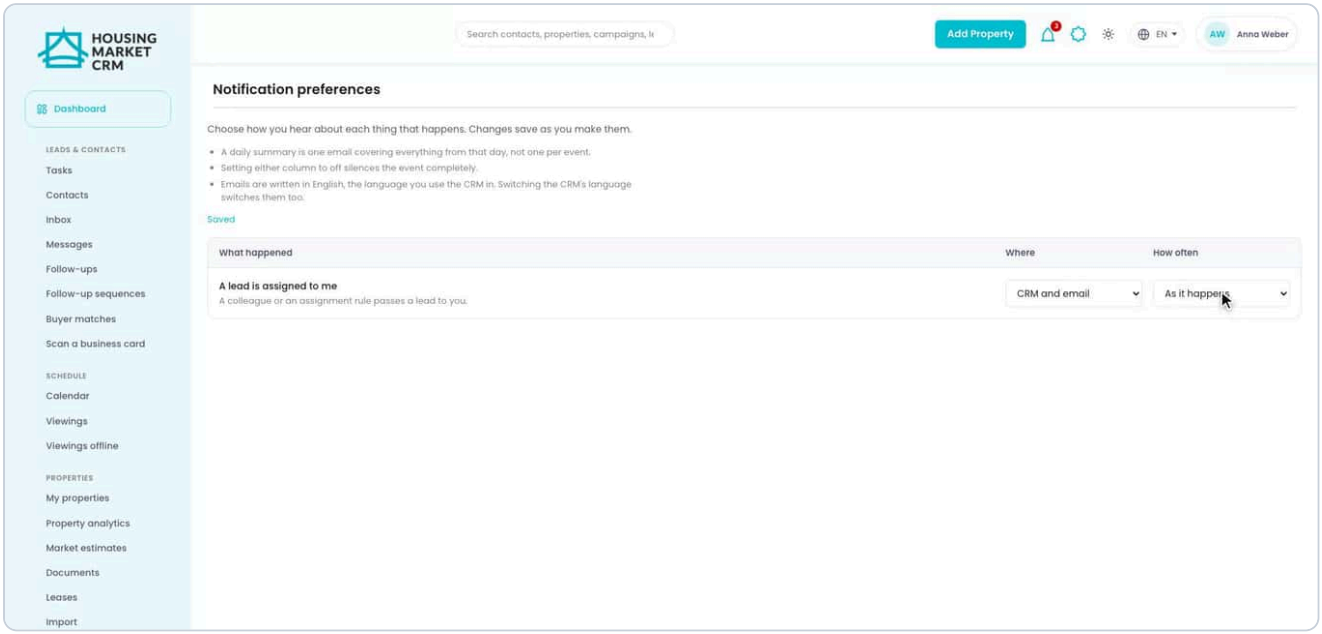


Figure 55.6 · Screen recorded 17 September 2026

7 Emails use the **language** you use the CRM in.

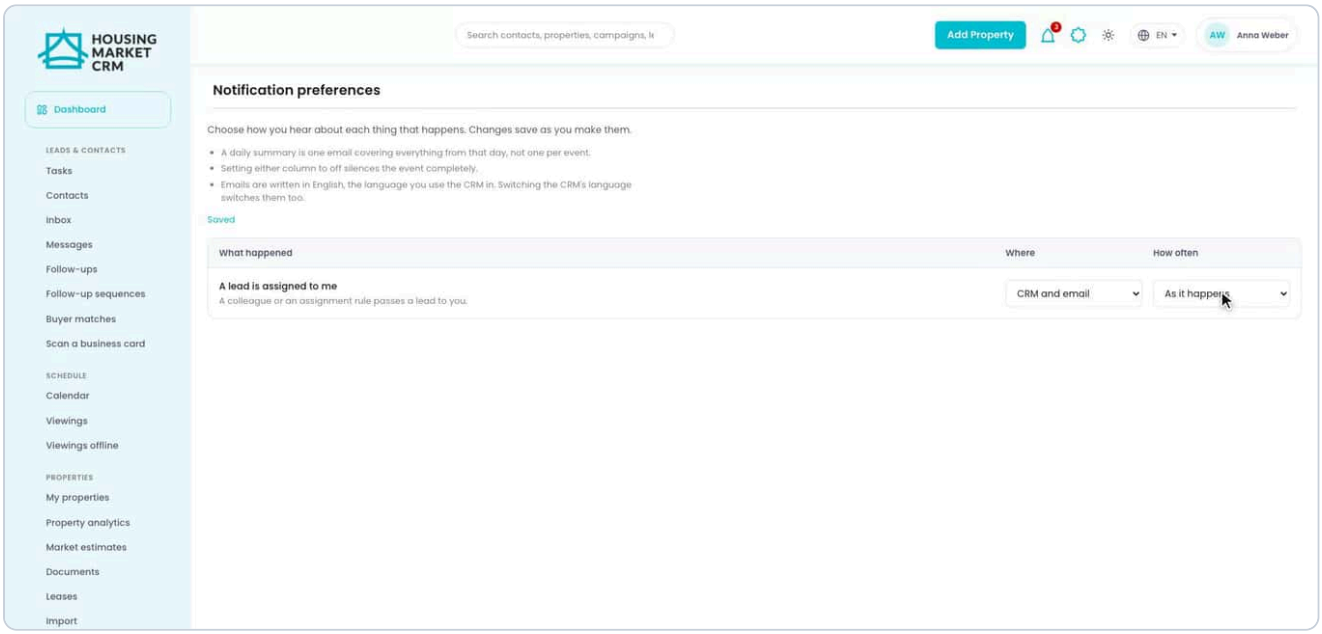


Figure 55.7 · Screen recorded 17 September 2026

GOOD TO KNOW

NOTE

The language you use the CRM in. Switch the CRM to another language and your notification emails switch with it.

Help Center: Which language are my CRM notification emails in?

56 CHAPTER 56

The calendar

All plans | For agents | Watch the video

OVERVIEW

Yes — viewings, calls and meetings booked against the property and the lead they belong to. On Pro you can connect Google Calendar or Outlook so the two stay in step.

Book viewings, calls and meetings, each attached to the property and the lead it belongs to, and see the whole week at once. It is part of the free plan.

On Pro, viewing scheduling works today on top of this calendar: you set your viewing rules, buyers get bookable slots, and both of you receive calendar invites. You can also connect your own Google Calendar or Microsoft 365 (Outlook) calendar under Settings → Calendar connections, so the CRM knows when you are already busy and what you add in either place reaches the other. See "How does viewing scheduling work?" and "Can I sync the CRM with my calendar?".

From the Help Center: **Is there a calendar?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

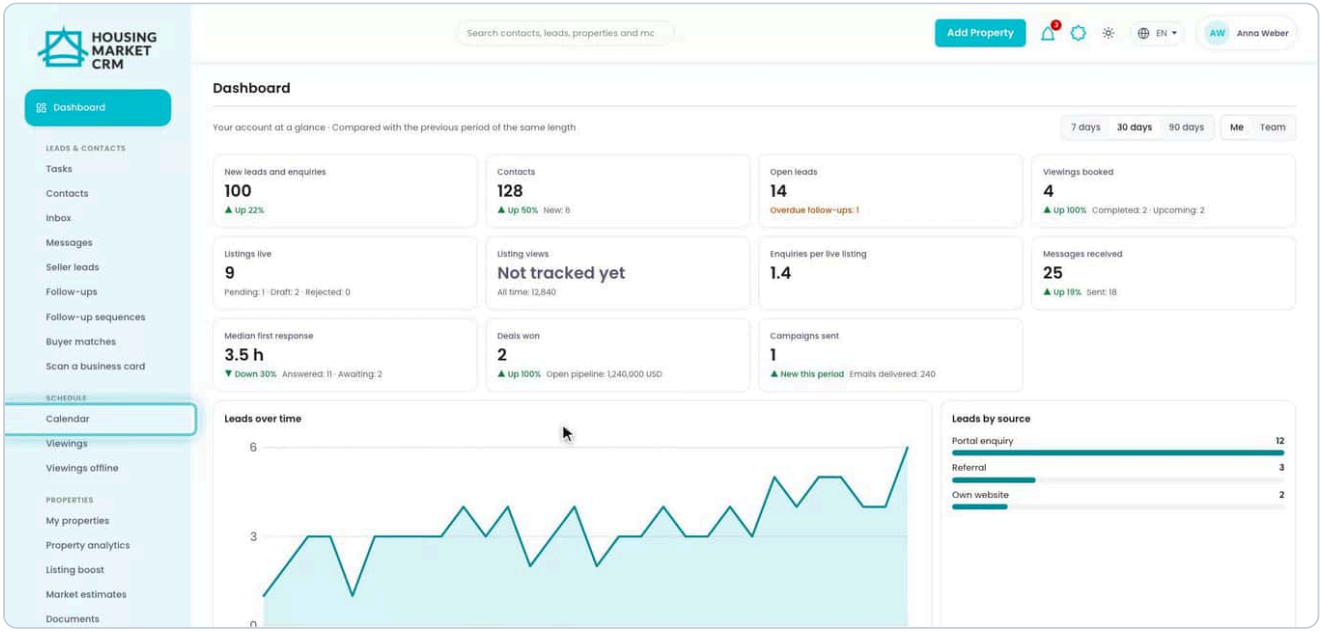


Figure 56.1 · Screen recorded 8 October 2026

2 Click **Calendar** in the left menu.

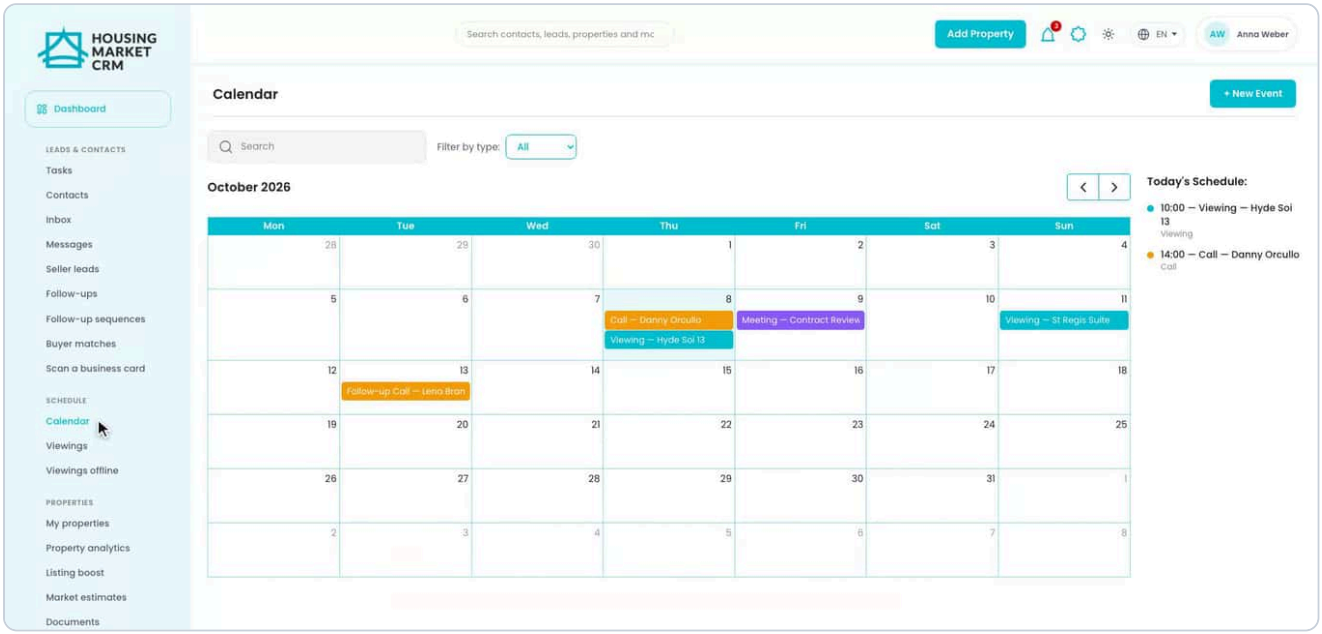


Figure 56.2 · Screen recorded 8 October 2026

3 Viewings, meetings and follow-ups on **one view**.

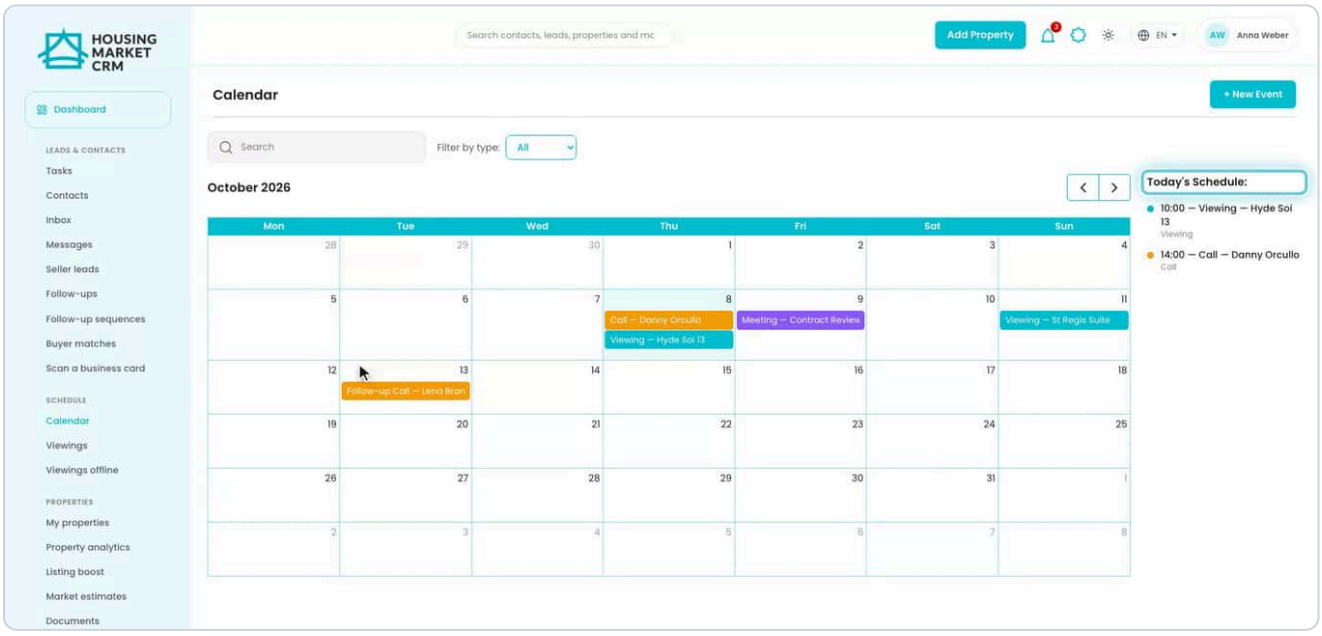


Figure 56.3 · Screen recorded 8 October 2026

4 **Today's schedule** is the list to read first.

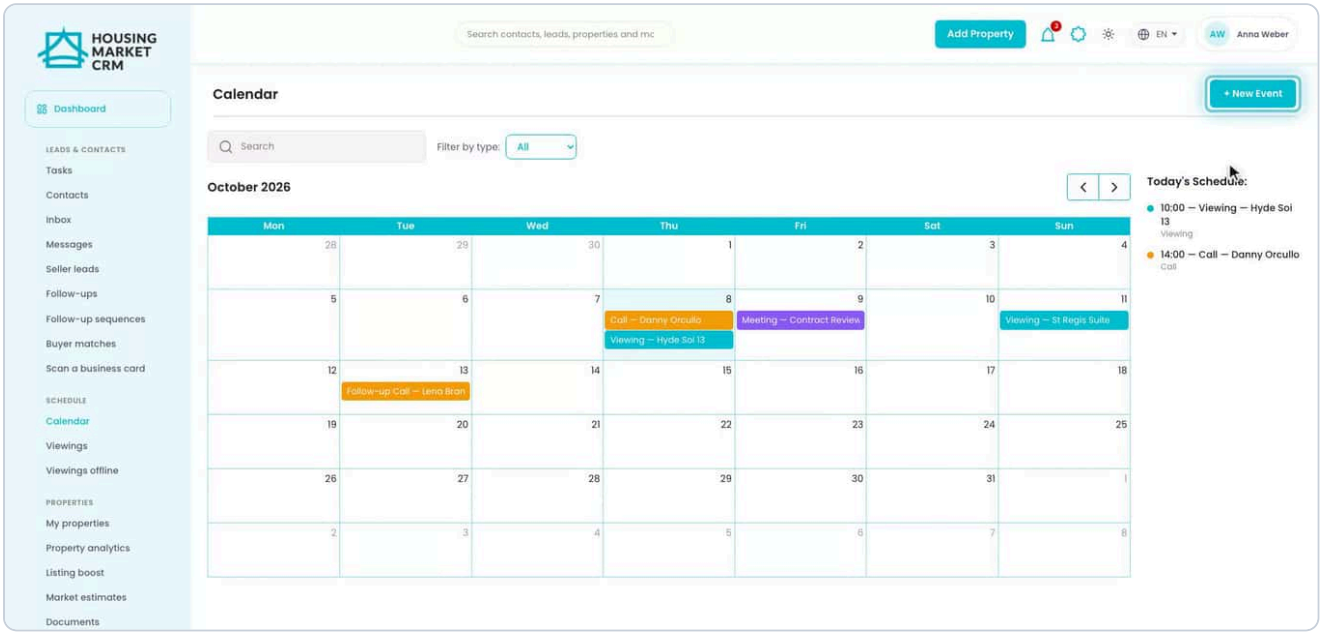


Figure 56.4 · Screen recorded 8 October 2026

5 Click **+ New Event**.

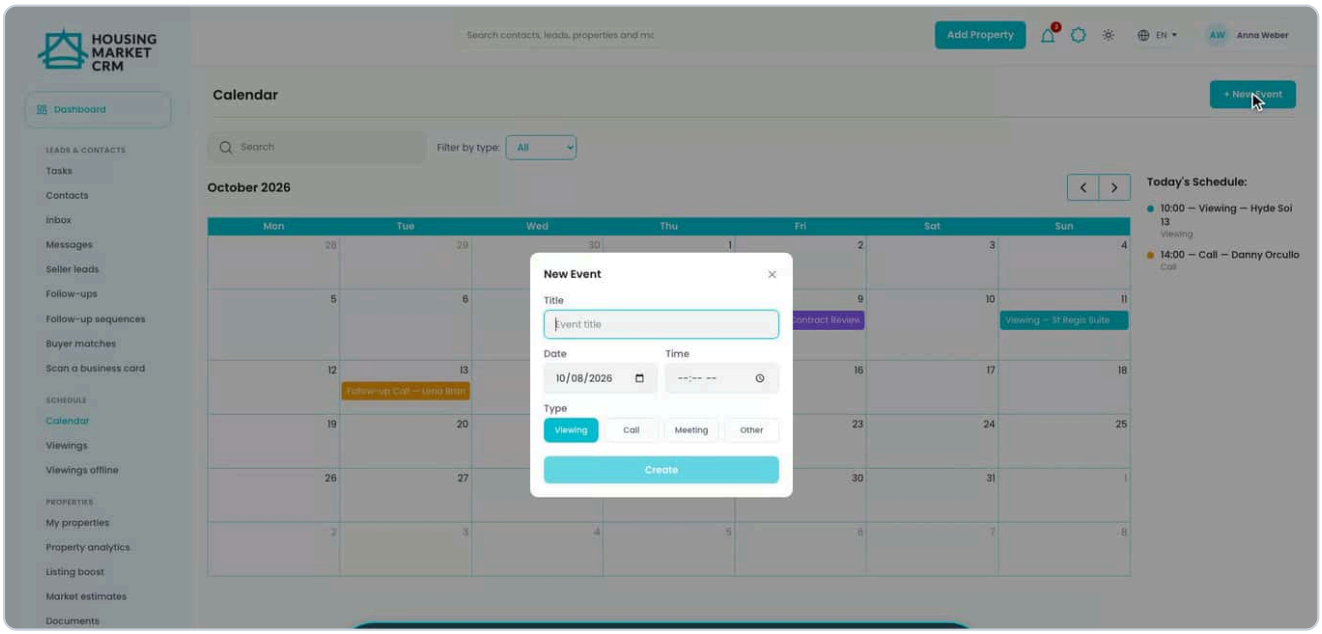


Figure 56.5 · Screen recorded 8 October 2026

6 Name it after the **property**, so the month stays readable.

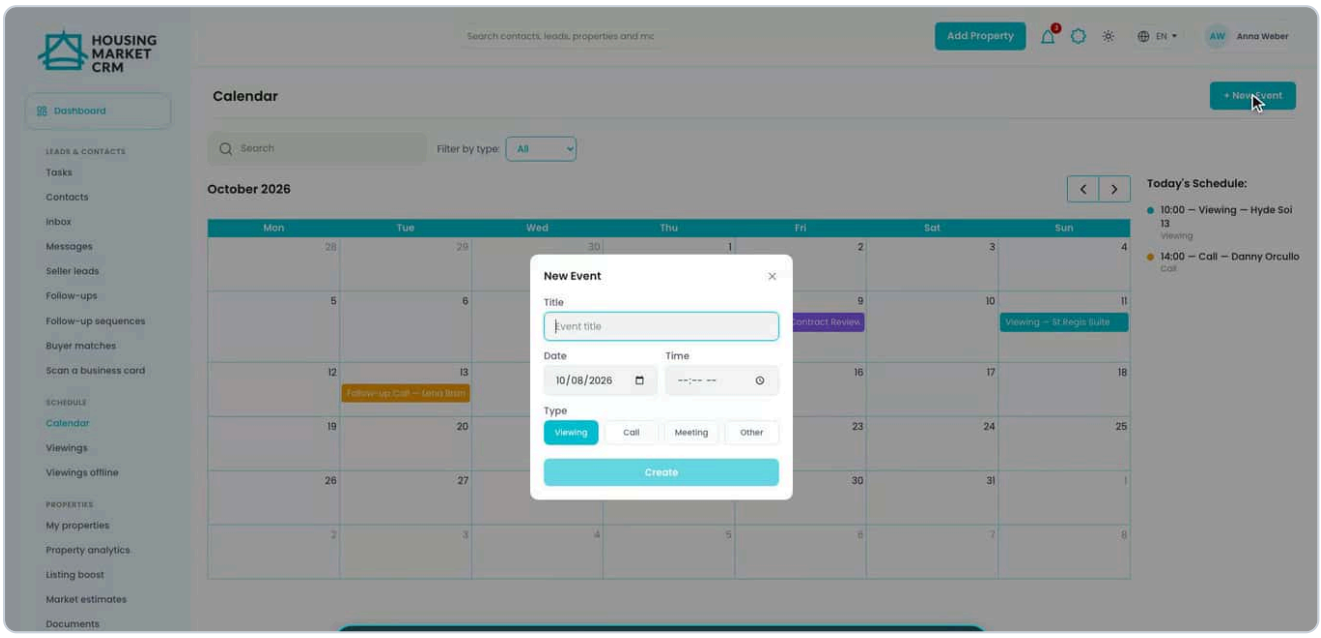


Figure 56.6 · Screen recorded 8 October 2026

7 Connect **Google** or **Microsoft** and your other appointments appear here too.

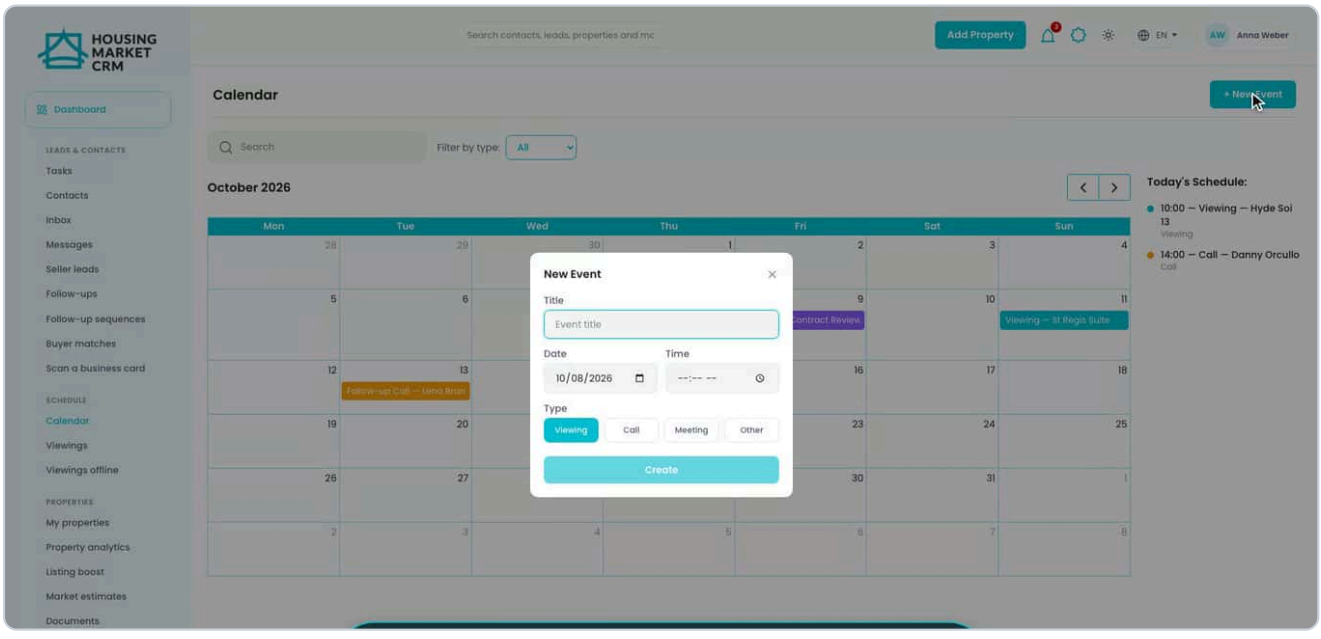


Figure 56.7 · Screen recorded 8 October 2026

8 A viewing you confirm in the CRM appears here — **never typed twice**.

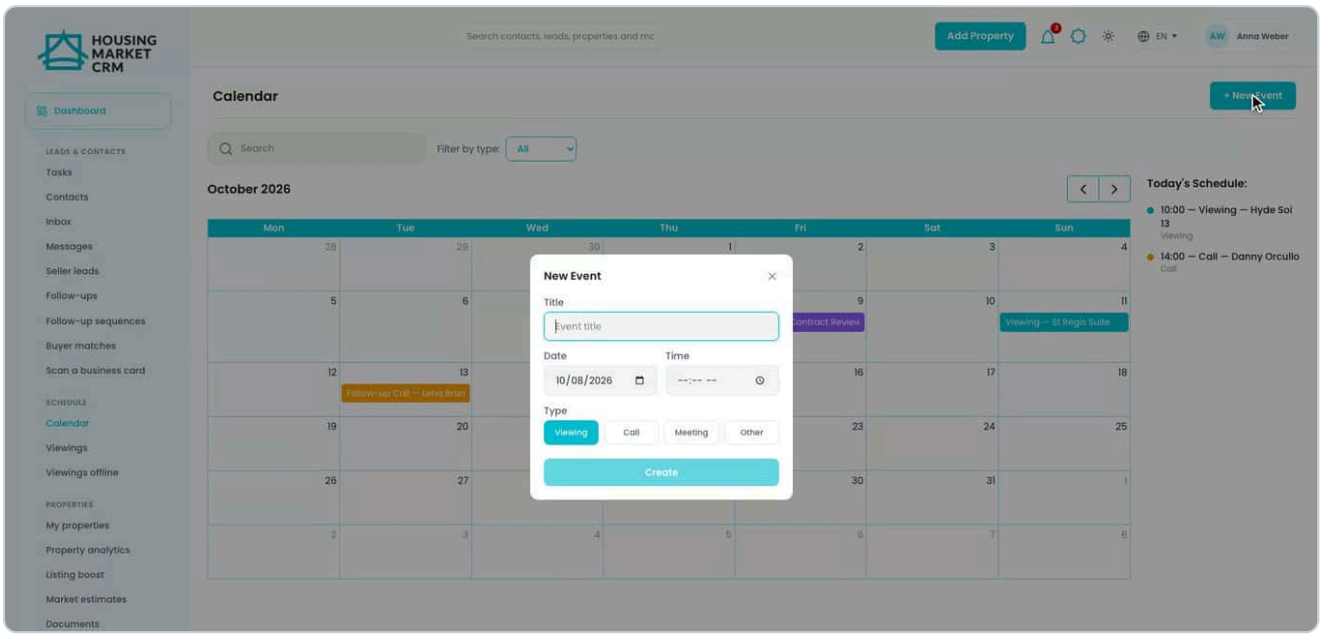


Figure 56.8 · Screen recorded 8 October 2026

9 Check it **before** you promise a buyer a time.

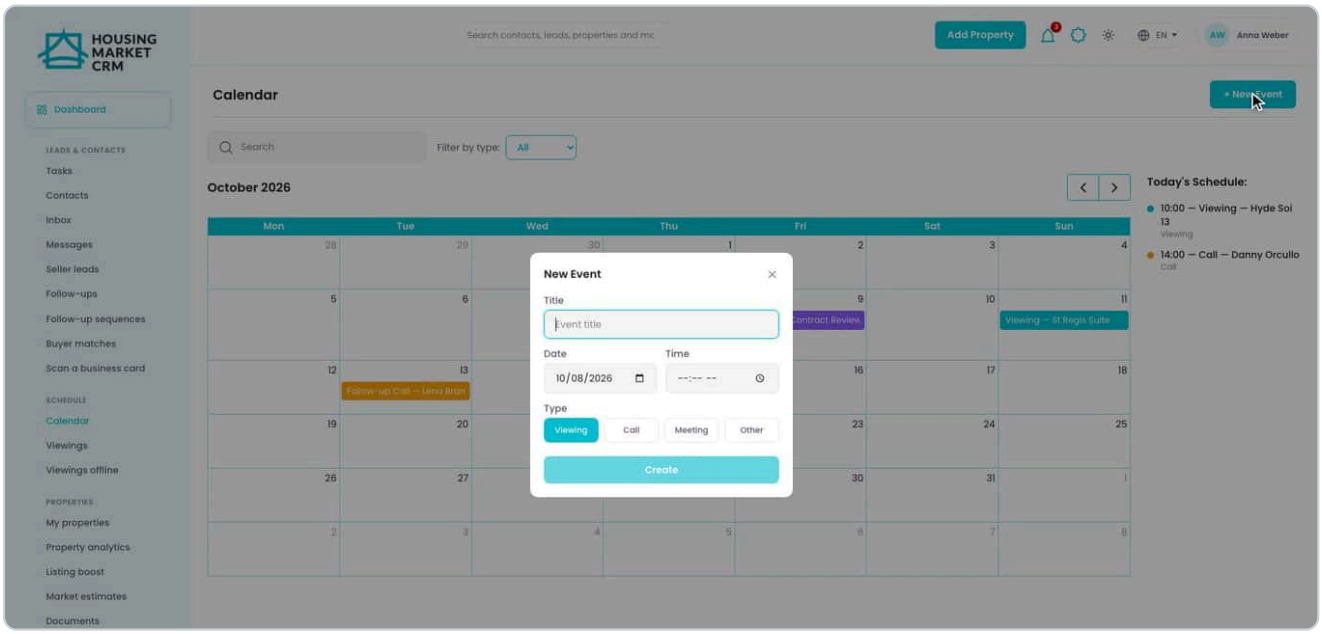


Figure 56.9 · Screen recorded 8 October 2026

RELATED HELP CENTER ARTICLES

Can I sync the CRM with my calendar?	faq.housingmarketgroup.com/faq/can-i-sync-the-crm-with-my-calendar
How does viewing scheduling work?	faq.housingmarketgroup.com/faq/how-does-viewing-scheduling-work

57 CHAPTER 57

Connect your calendar

Pro and Business | For agents | Watch the video

OVERVIEW

Yes, on Pro. Connect Google Calendar or Microsoft 365 (Outlook) under Settings → Calendar connections. Events you add in the CRM go to your calendar, and changes you make there come back.

Yes, on Pro. Open Settings (the gear) → Calendar connections and choose Connect next to Microsoft 365 or Google Calendar; until you have connected one, the Calendar page offers the same two buttons. Microsoft 365 covers Outlook, whether you sign in with a work or school account or a personal Outlook.com account. You sign in at Microsoft or Google and approve the connection there. Because the sync runs both ways, the CRM asks to read and change the events in your calendar; it never asks for access to your mail on that screen.

Once connected, the sync works in both directions with your main calendar: the default calendar in Outlook, the primary calendar in Google. Events you add in the CRM, including every viewing a buyer books, are written to it, and events you add or change there come back to the CRM with their title and time, marked as coming from your calendar. The CRM syncs on its own every five minutes, and Sync now on the Calendar connections screen syncs straight away. When the same event is changed in both places, the more recent change wins. Deleting an event in your calendar removes it from the CRM only if it came from there, so a booking or a record attached to a client is never lost.

The CRM also reads your busy times before it offers a viewing slot, so buyers are not offered a time when you are already busy. If a connection expires, the screen asks you to reconnect it, and online booking pauses for you until you do. You can disconnect at any time, which deletes the credentials the CRM holds; to withdraw the permission itself, remove the application from your Microsoft or Google account.

Connecting a calendar is separate from connecting your email. Two-way sync with your own Microsoft 365 mailbox, so you can read and reply to client email inside the CRM inbox, is being built as a separate Pro feature, and so is the same sync with your Gmail mailbox; there is no date for either yet. Without a connected calendar, the CRM's own calendar and the emailed calendar invites work as before.

From the Help Center: **Can I sync the CRM with my calendar?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

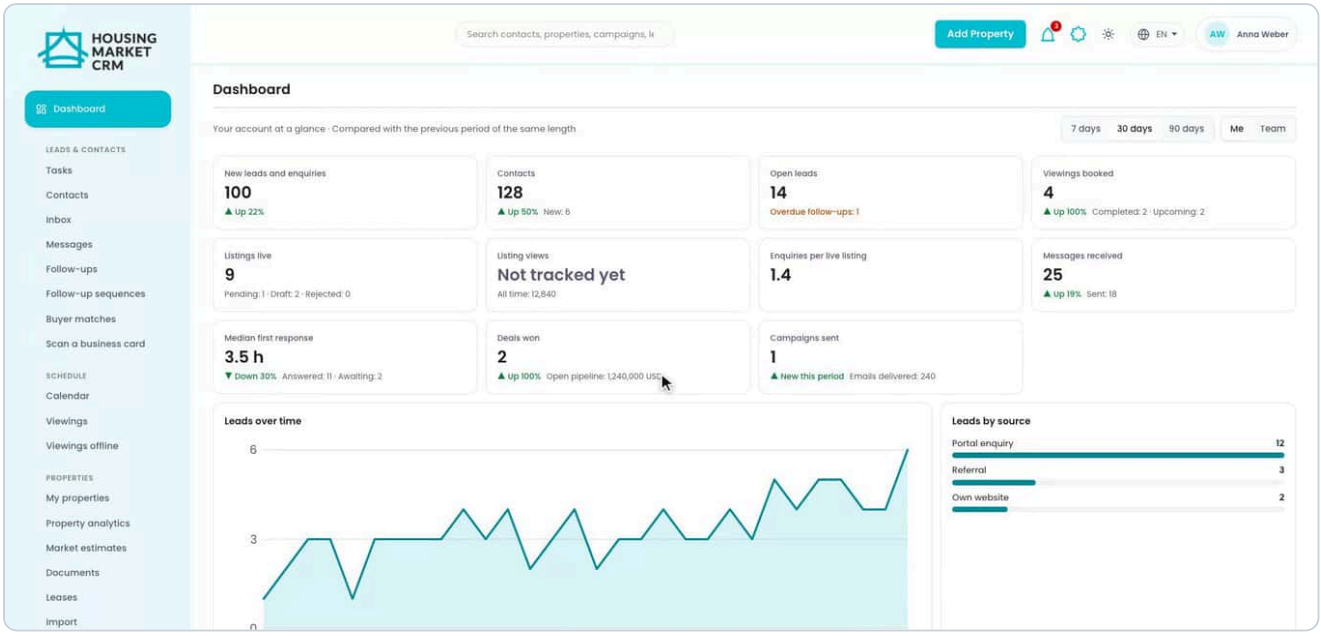


Figure 57.1 · Screen recorded 17 September 2026

2 Click the **Settings** icon at the top.

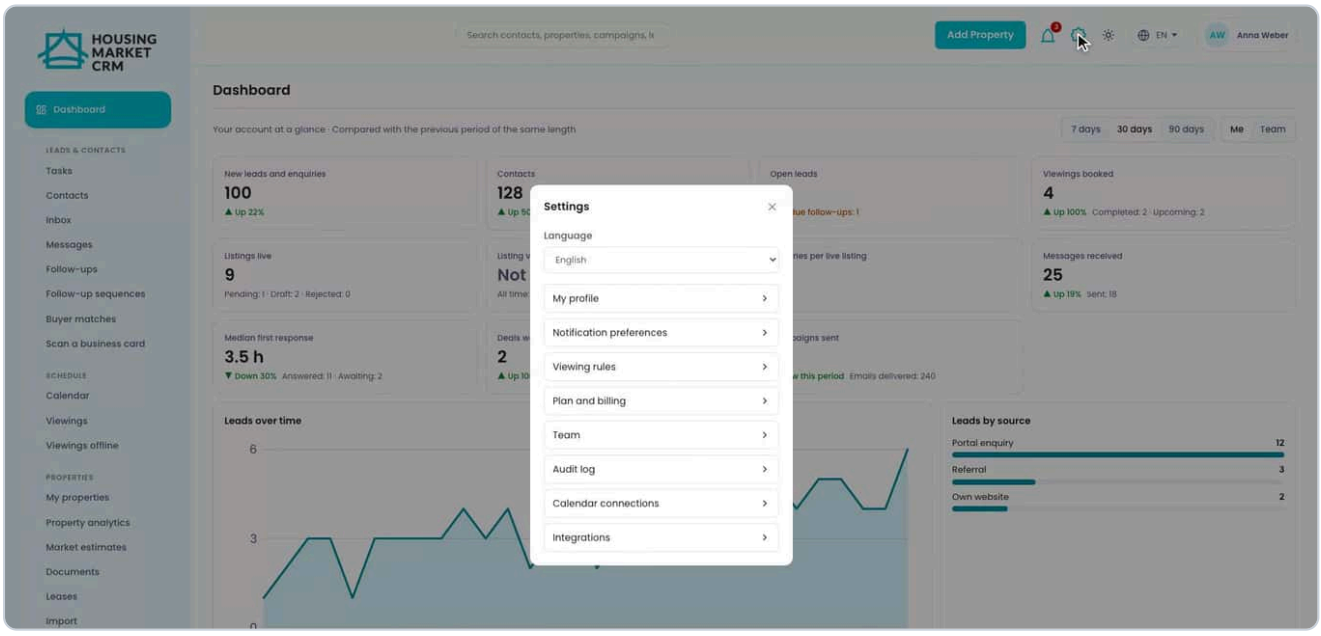


Figure 57.2 · Screen recorded 17 September 2026

3 Choose **Calendar connections**.

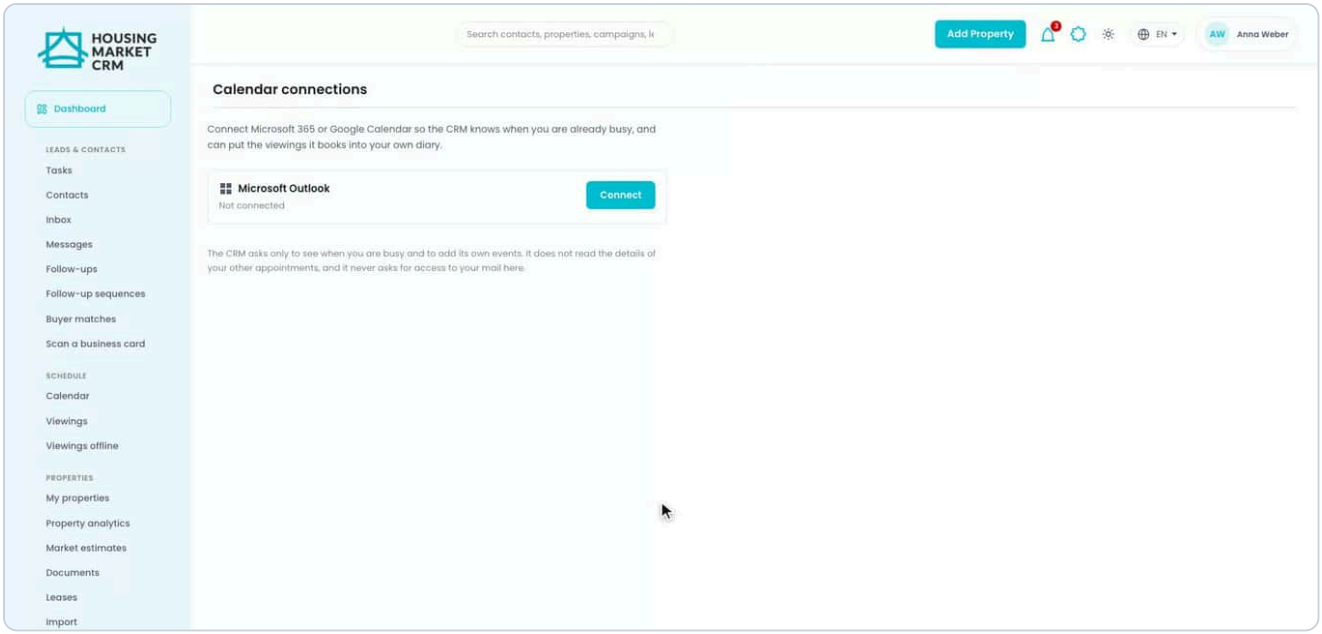


Figure 57.3 · Screen recorded 17 September 2026

4 The CRM checks when you are **busy** and adds the viewings it books.

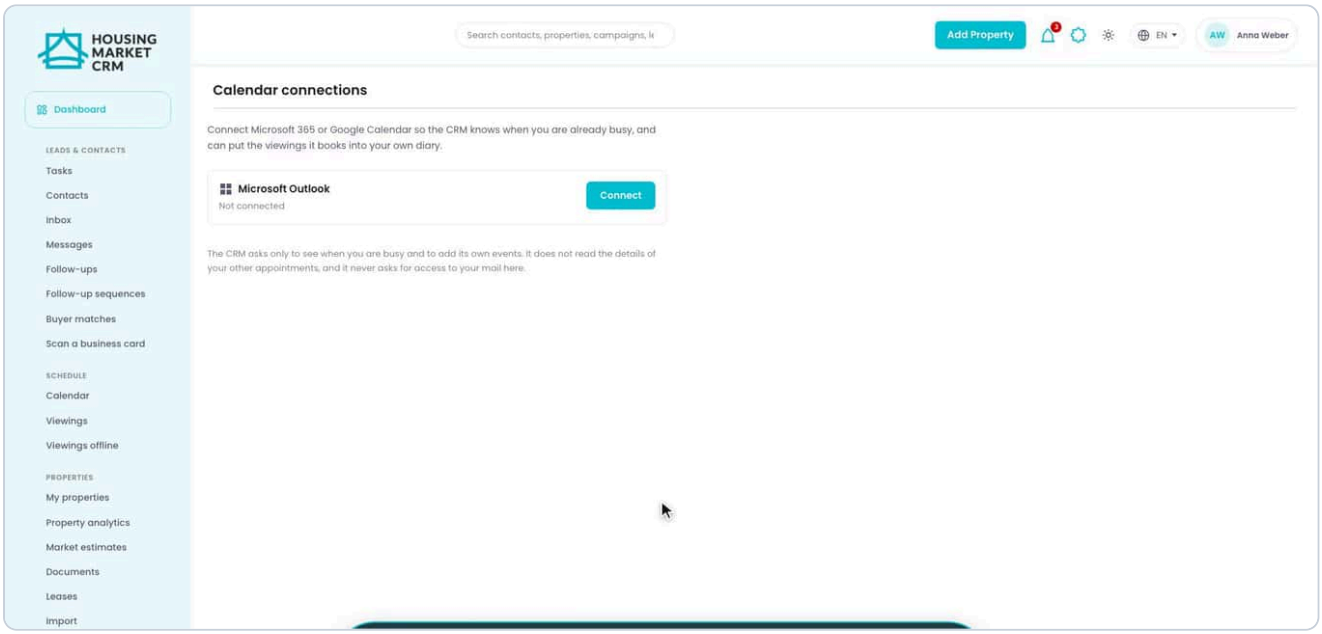


Figure 57.4 · Screen recorded 17 September 2026

5 It never reads the details of your **other appointments**.

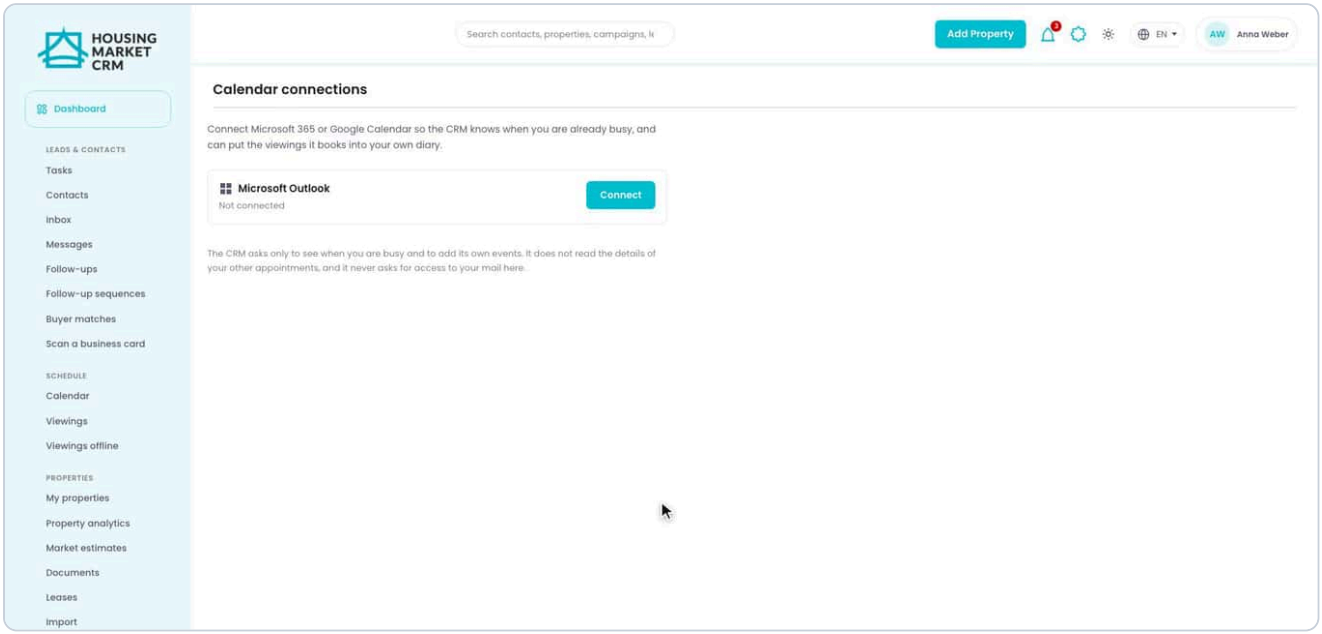


Figure 57.5 · Screen recorded 17 September 2026

6 Click **Connect** next to your calendar.

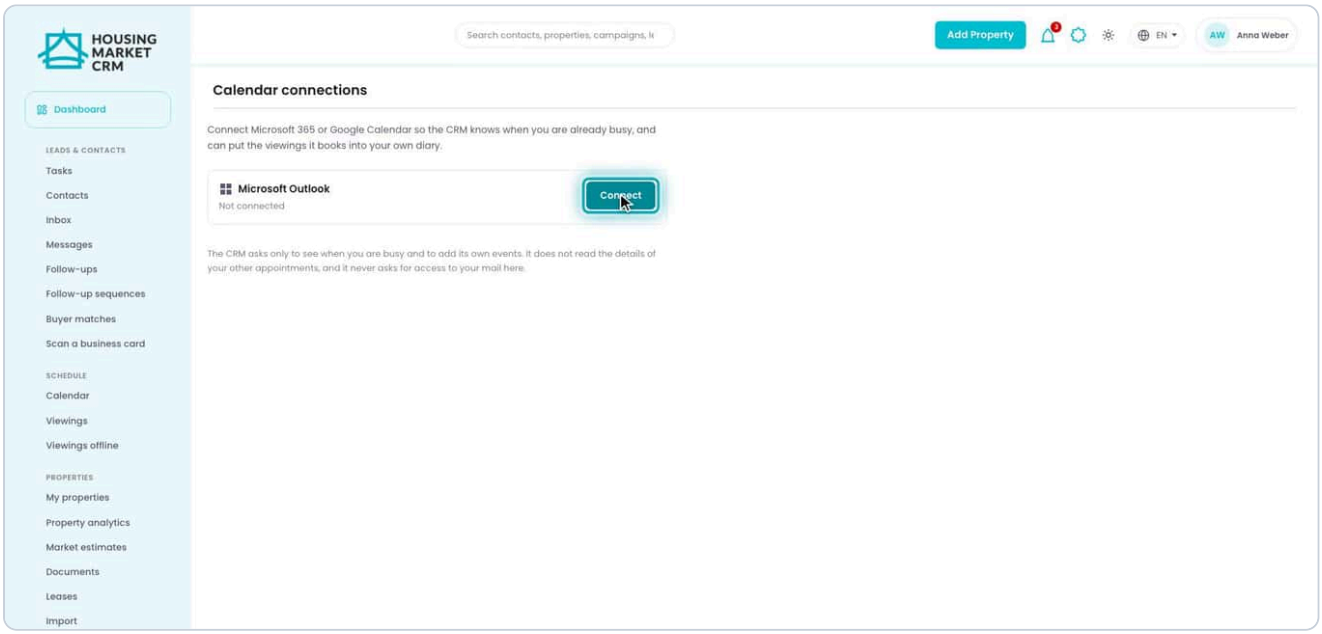


Figure 57.6 · Screen recorded 17 September 2026

7 Sign in and allow access on **Microsoft's page**, then return here.

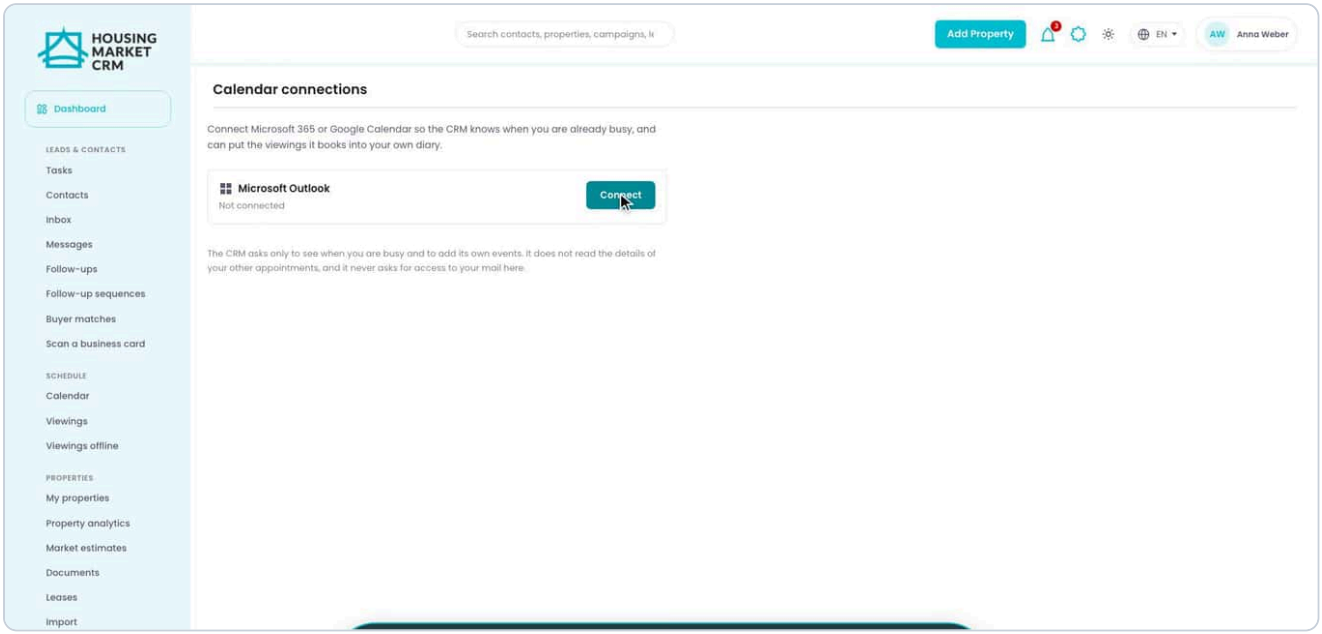


Figure 57.7 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

Is there a calendar? — faq.housingmarketgroup.com/faq/is-there-a-calendar

58 CHAPTER 58

Schedule viewings

All plans | For agents | Watch the video

TODO Plan: the Help Center says viewing scheduling "is part of Pro"; the video catalogue lists this task for all plans, so the chapter prints "All plans". Confirm the plan.

OVERVIEW

On Pro, you set when you are available for viewings, buyers book online from your listing on the portal, and each booking lands on your calendar as a lead with a calendar invite for you and the buyer.

Open Viewings and set your viewing rules: the days and hours you take viewings, how long each one lasts, the gap you need between them and how far ahead a buyer may book. The CRM turns those rules into bookable slots and never offers the same slot twice. It is part of Pro.

- A booking is added to your CRM calendar, and to your Google Calendar or Outlook calendar if you have connected one under Settings → Calendar connections. The CRM reads that calendar for busy times before it offers a slot; without one connected, keep the CRM calendar current so slots do not clash with appointments kept elsewhere.
- The buyer becomes a lead and a contact, attached to the property, if they are not one already.
- You and the buyer both receive an email with a calendar invite, and another if the viewing is rescheduled or cancelled.
- The Viewings screen lists upcoming, past and cancelled bookings, with reschedule and cancel on each.

Buyers book online with the "Book a viewing" button on your listing's page on the portal, and with "Book a consultation" on your agent page there. They choose a day and a time from the slots your rules allow.

On your phone, Viewings offline keeps your upcoming viewings on the phone, so they open without a signal, and reloading or starting the app with no signal keeps you signed in. Notes you write there are held on the phone and sent as soon as you are back online, whole rather than cut short. A note for a viewing that is not linked to a lead or a contact stays on the phone with a warning: it is sent once the viewing is linked and the saved viewings are refreshed, or you can copy it and choose Remove. Signing out removes the saved viewings from the phone; if notes are still waiting to be sent, you are asked first, because signing out deletes them. If your session simply expires they are kept and sent after you sign back in, and they are deleted if someone else signs in on that phone.

If an account drops below Pro, viewings already booked stay booked — they were promised to a buyer — but no new slots are offered.

From the Help Center: **How does viewing scheduling work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

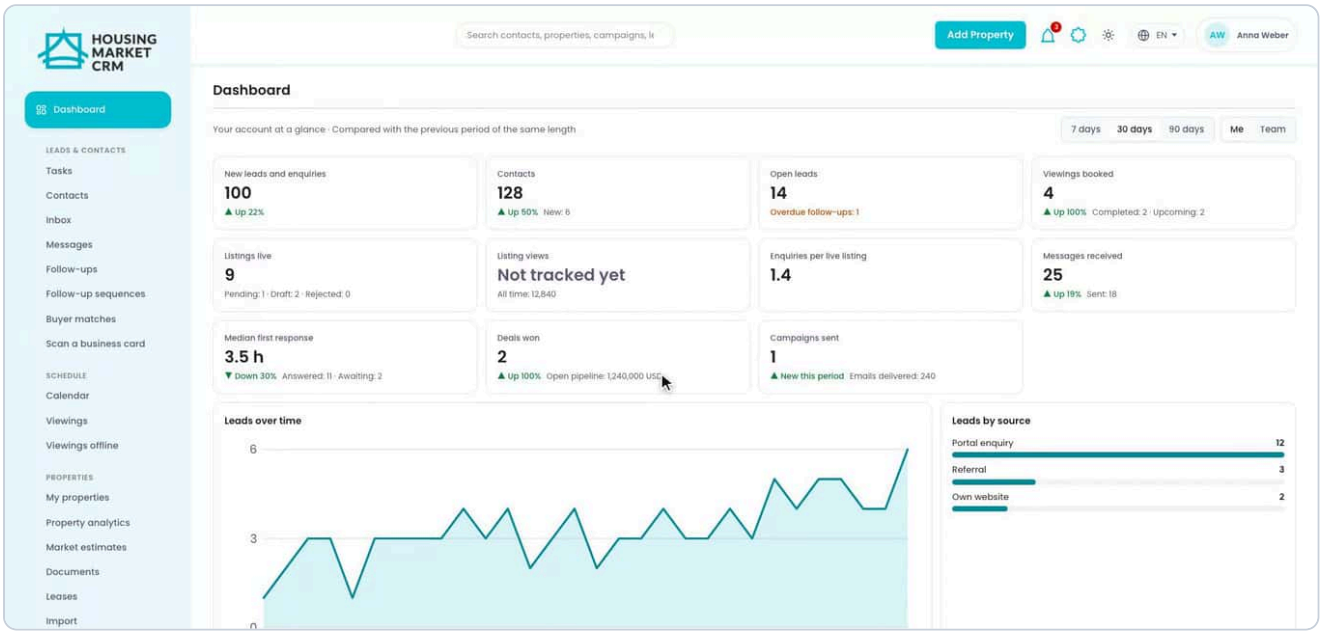


Figure 58.1 · Screen recorded 17 September 2026

2 Click **Viewings** in the left menu.

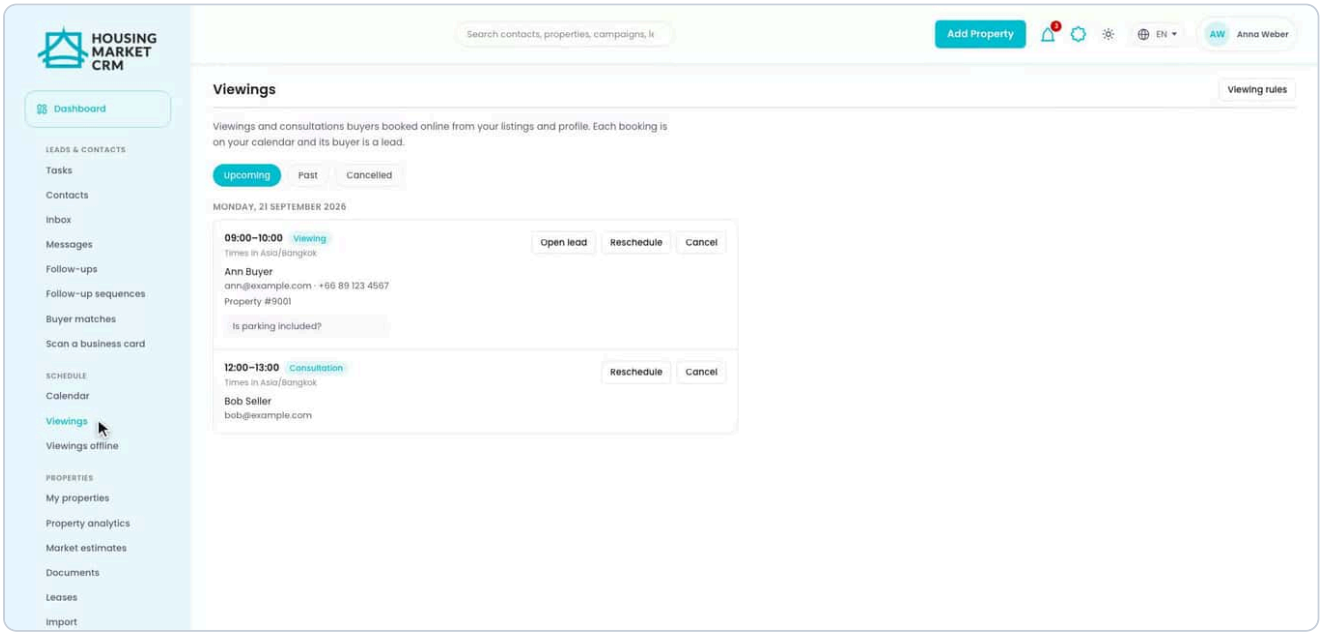


Figure 58.2 · Screen recorded 17 September 2026

3 Bookings made online appear here and in your **calendar**.

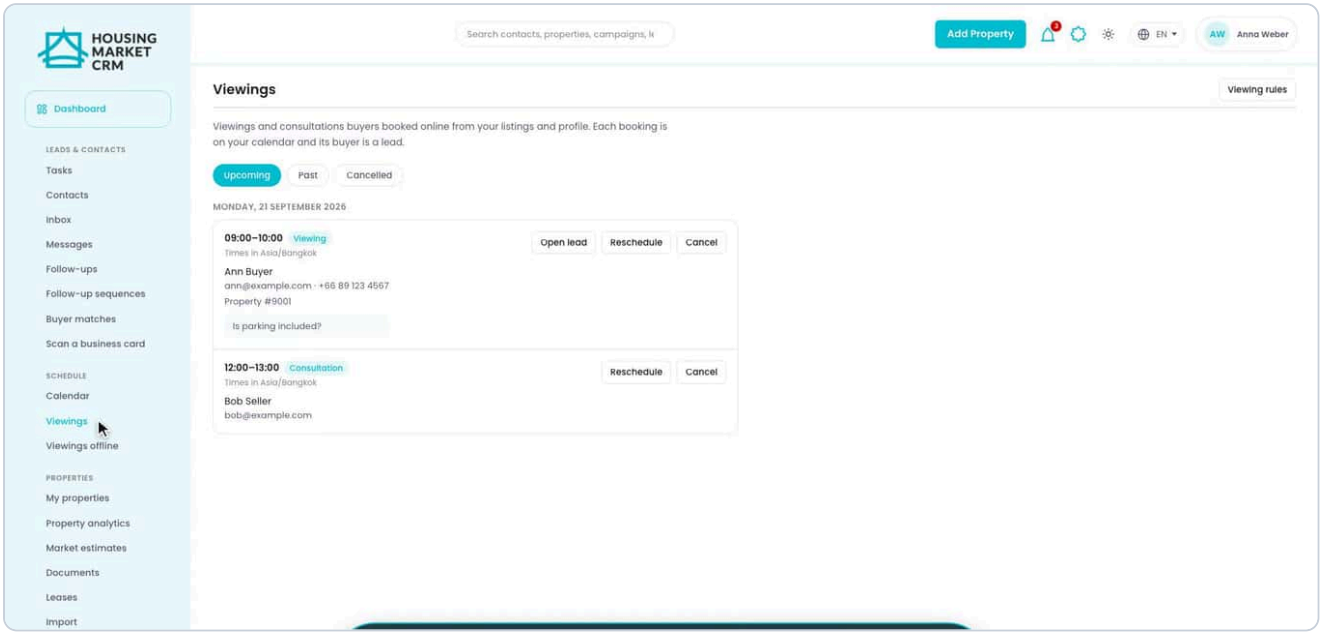


Figure 58.3 · Screen recorded 17 September 2026

4 Open the lead, **Reschedule** or **Cancel** a booking.

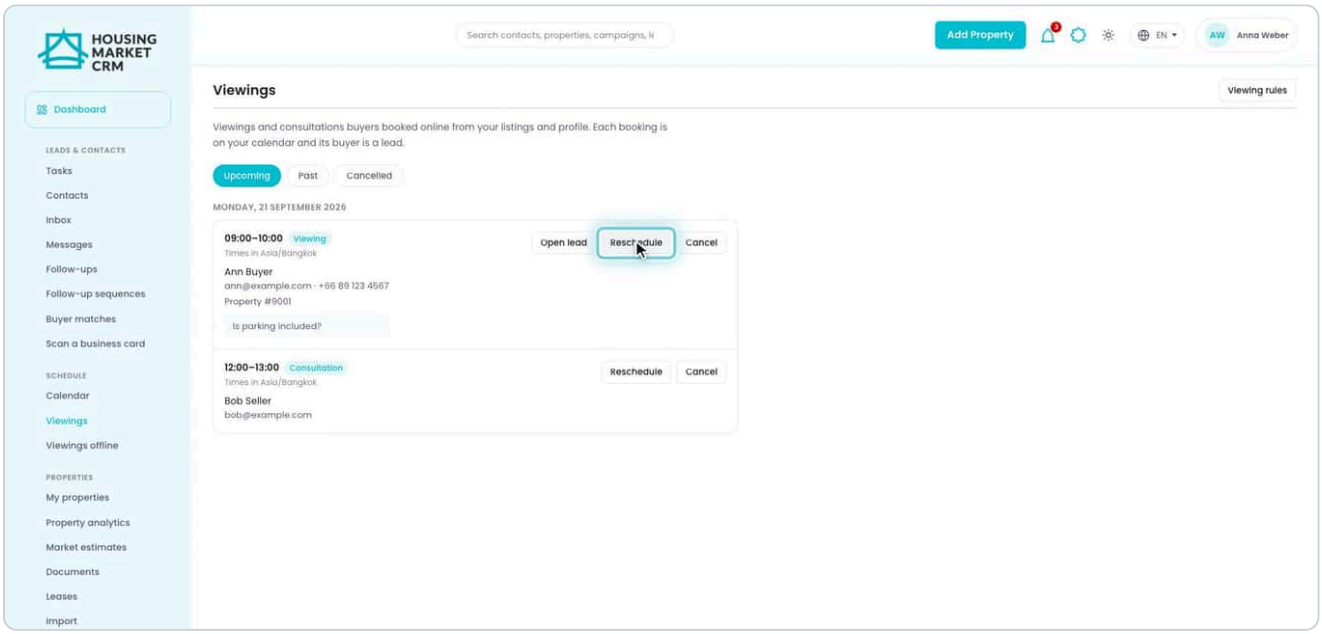


Figure 58.4 · Screen recorded 17 September 2026

5 See **past** and **cancelled** viewings too.

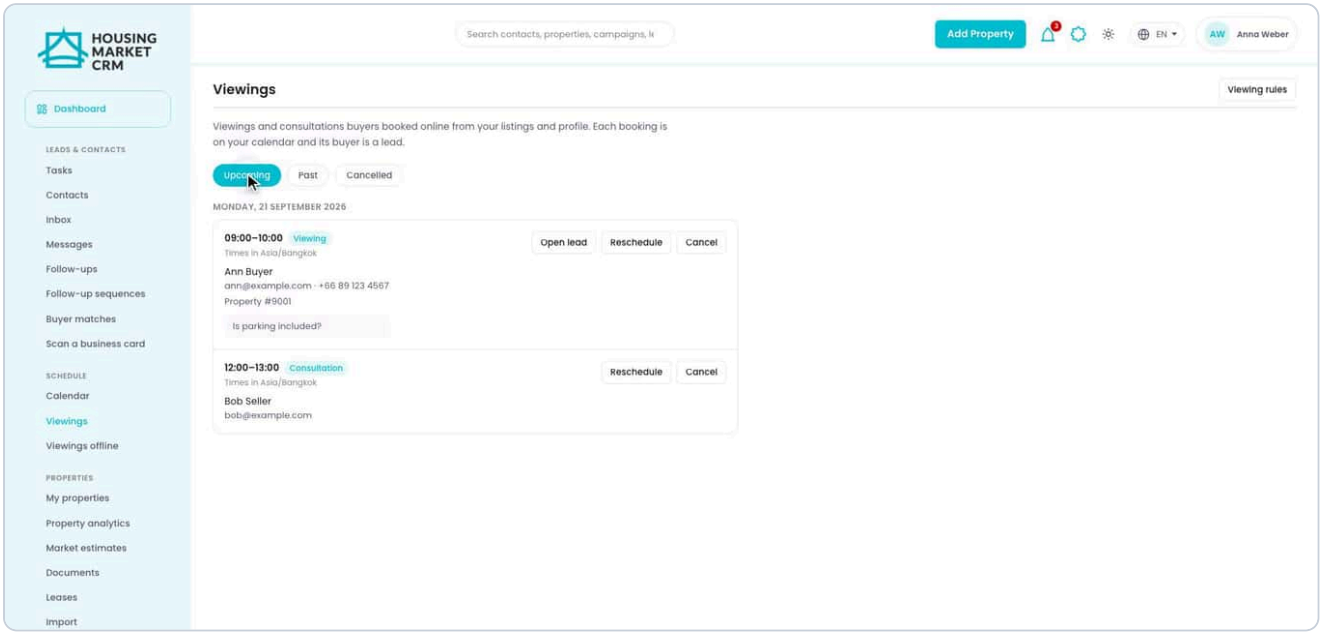


Figure 58.5 · Screen recorded 17 September 2026

6 Click **Viewing rules**.

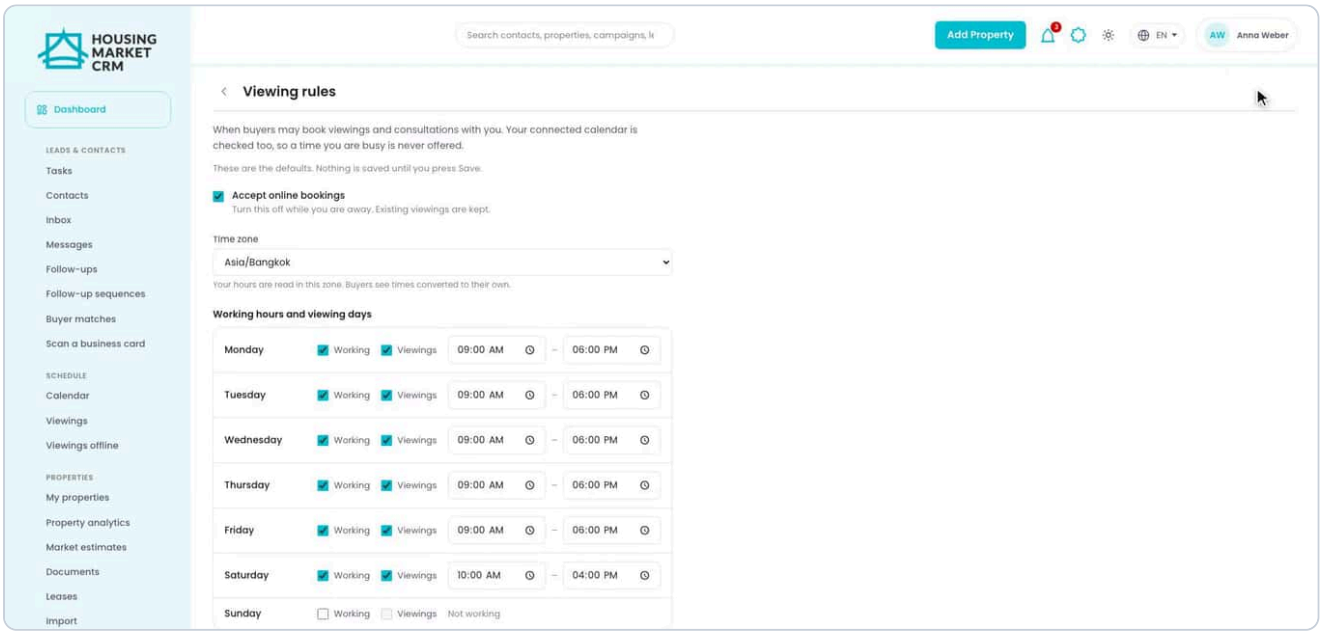


Figure 58.6 · Screen recorded 17 September 2026

7 Switch **online bookings** on or off.

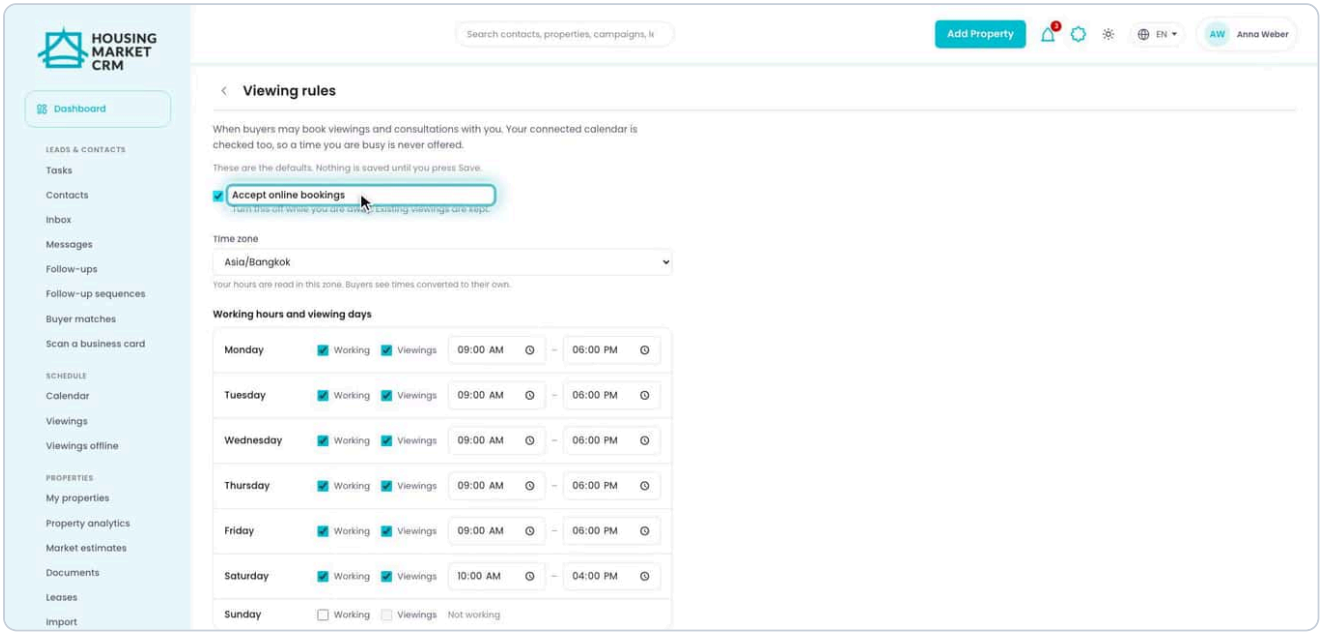


Figure 58.7 · Screen recorded 17 September 2026

8 Set your **time zone**.

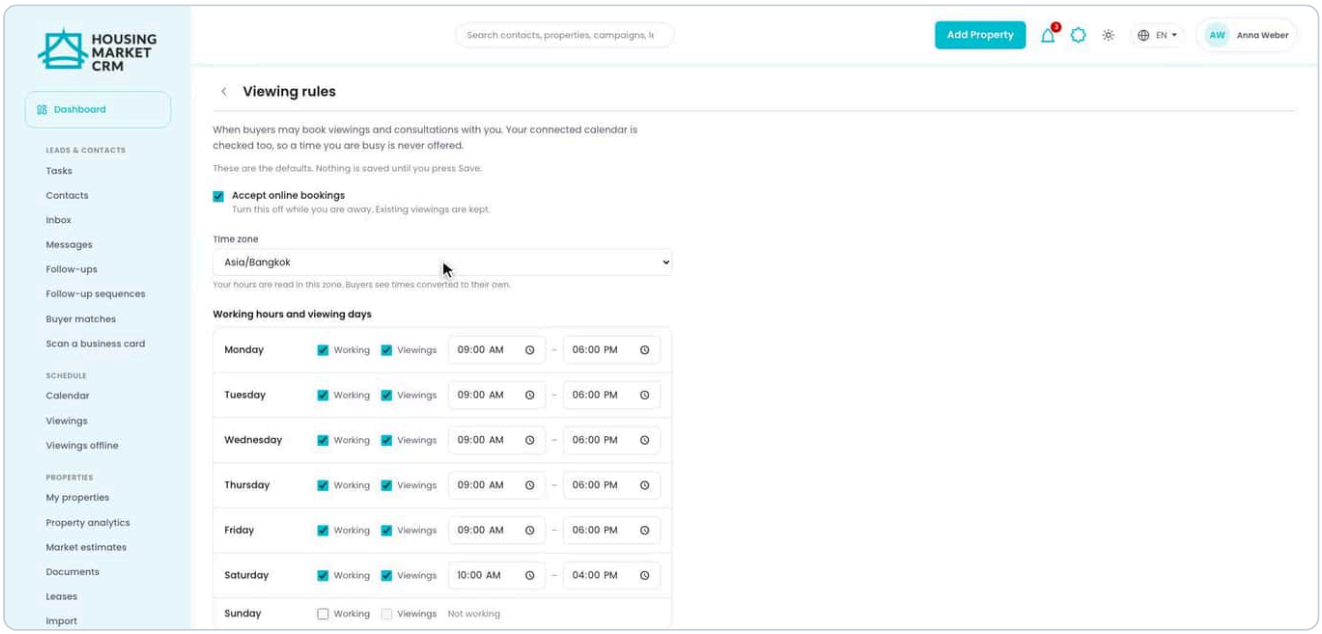


Figure 58.8 · Screen recorded 17 September 2026

9 Choose **working hours** and **viewing days**.

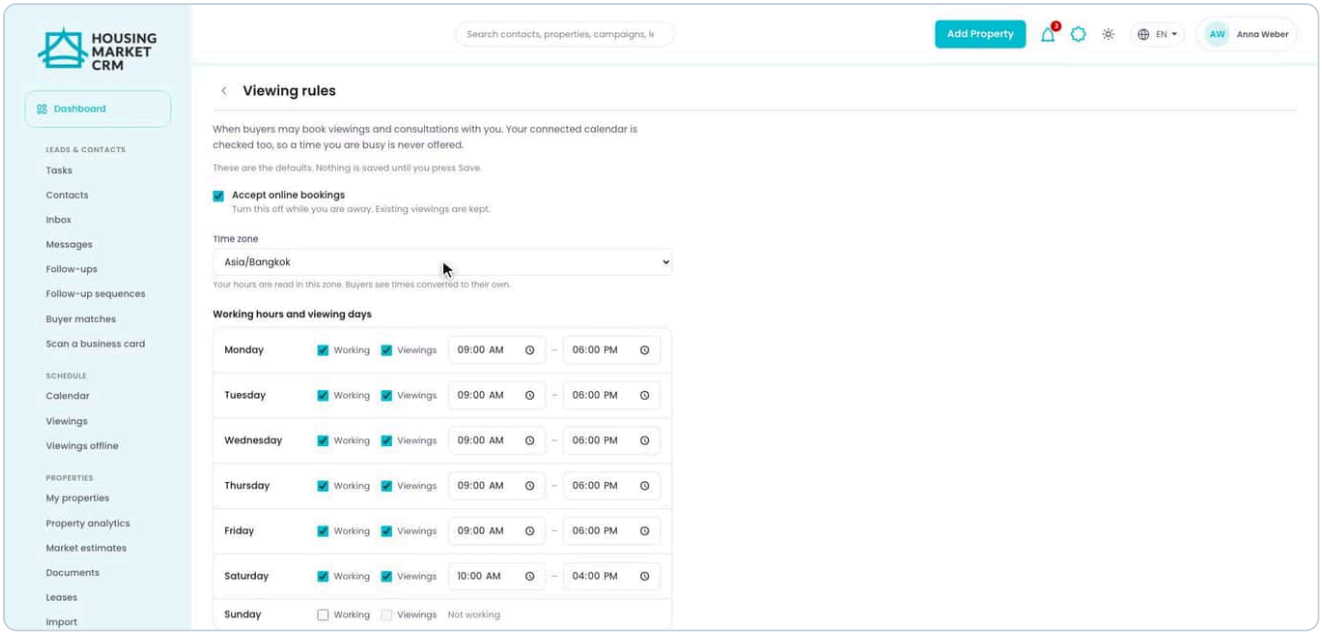


Figure 58.9 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

Is there a calendar?	faq.housingmarketgroup.com/faq/is-there-a-calendar

59 CHAPTER 59

Viewings offline

All plans | For agents | Watch the video

OVERVIEW

On Pro, you set when you are available for viewings, buyers book online from your listing on the portal, and each booking lands on your calendar as a lead with a calendar invite for you and the buyer.

Open Viewings and set your viewing rules: the days and hours you take viewings, how long each one lasts, the gap you need between them and how far ahead a buyer may book. The CRM turns those rules into bookable slots and never offers the same slot twice. It is part of Pro.

- A booking is added to your CRM calendar, and to your Google Calendar or Outlook calendar if you have connected one under Settings → Calendar connections. The CRM reads that calendar for busy times before it offers a slot; without one connected, keep the CRM calendar current so slots do not clash with appointments kept elsewhere.
- The buyer becomes a lead and a contact, attached to the property, if they are not one already.
- You and the buyer both receive an email with a calendar invite, and another if the viewing is rescheduled or cancelled.
- The Viewings screen lists upcoming, past and cancelled bookings, with reschedule and cancel on each.

Buyers book online with the "Book a viewing" button on your listing's page on the portal, and with "Book a consultation" on your agent page there. They choose a day and a time from the slots your rules allow.

On your phone, Viewings offline keeps your upcoming viewings on the phone, so they open without a signal, and reloading or starting the app with no signal keeps you signed in. Notes you write there are held on the phone and sent as soon as you are back online, whole rather than cut short. A note for a viewing that is not linked to a lead or a contact stays on the phone with a warning: it is sent once the viewing is linked and the saved viewings are refreshed, or you can copy it and choose Remove. Signing out removes the saved viewings from the phone; if notes are still waiting to be sent, you are asked first, because signing out deletes them. If your session simply expires they are kept and sent after you sign back in, and they are deleted if someone else signs in on that phone.

If an account drops below Pro, viewings already booked stay booked — they were promised to a buyer — but no new slots are offered.

From the Help Center: **How does viewing scheduling work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

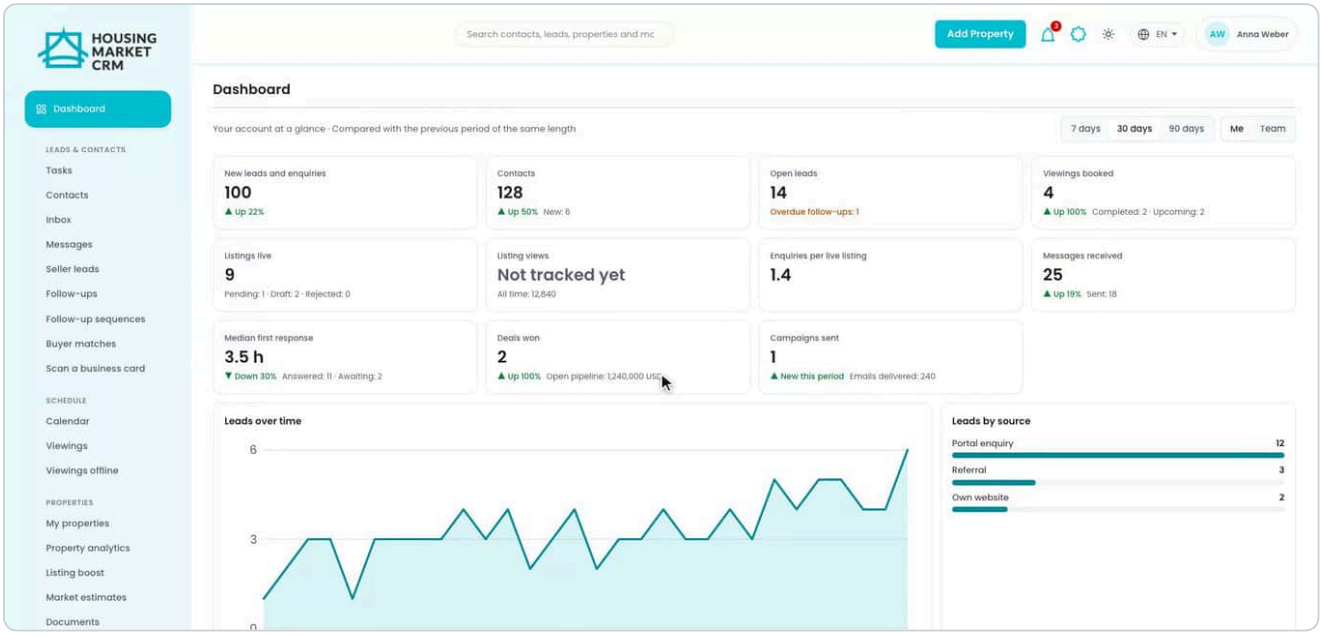


Figure 59.1 · Screen recorded 8 October 2026

2 Click **Viewings offline** in the left menu.

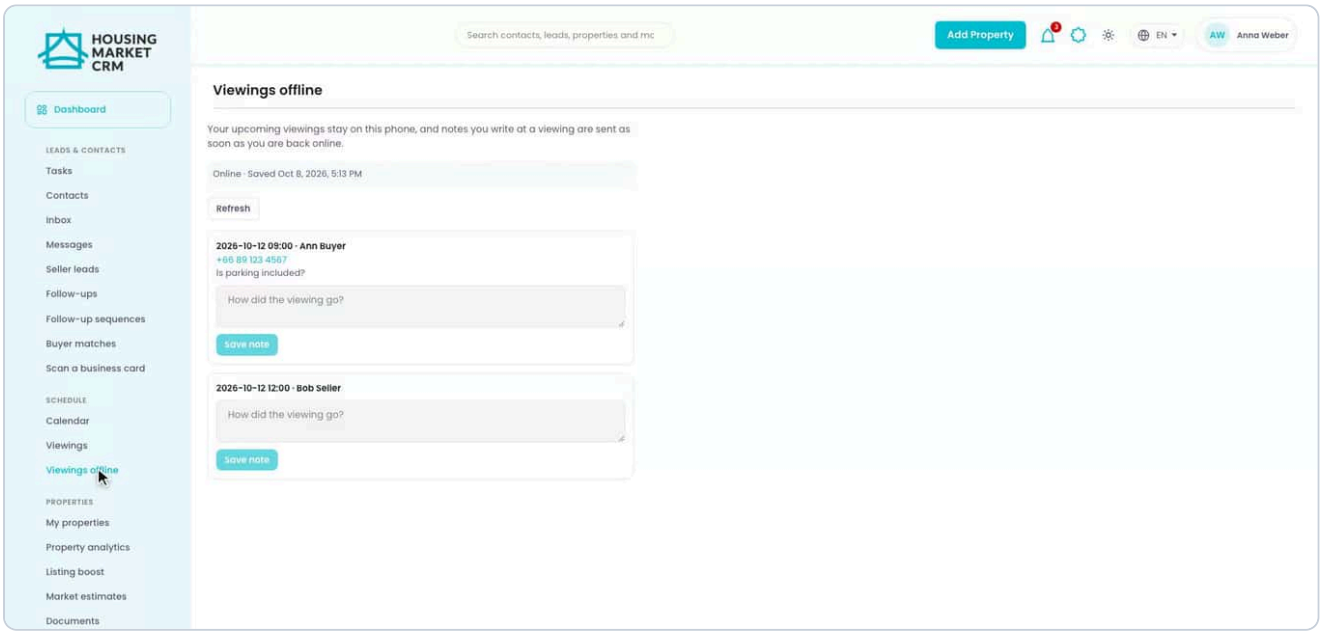


Figure 59.2 · Screen recorded 8 October 2026

3 Open it **before you leave** — that is what saves the day to the phone.

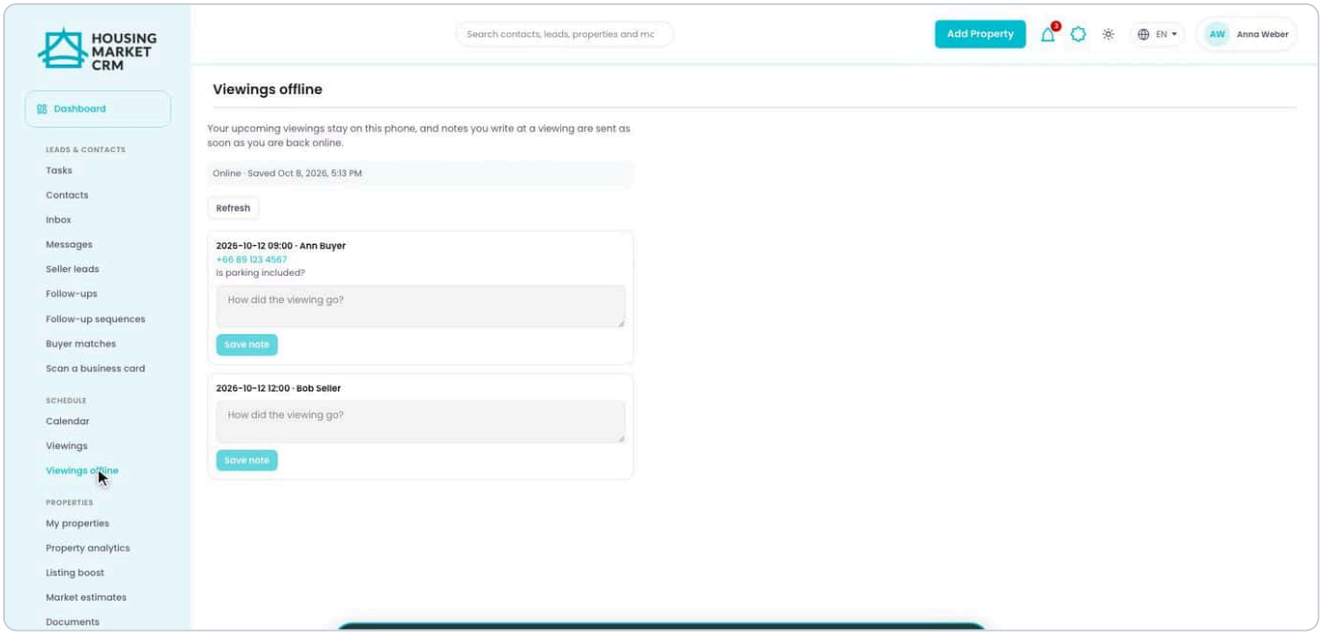


Figure 59.3 · Screen recorded 8 October 2026

4 The buyer's **number** is here, for when nobody turns up.

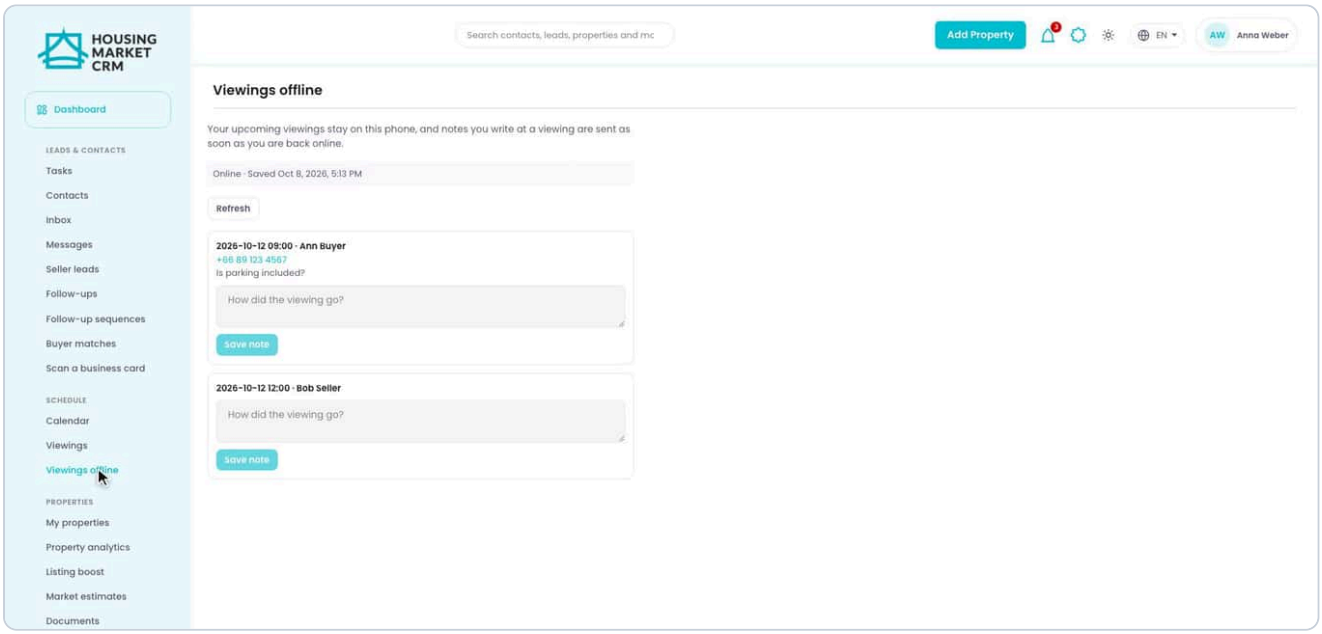


Figure 59.4 · Screen recorded 8 October 2026

5 Write the note **at the property** and save it.

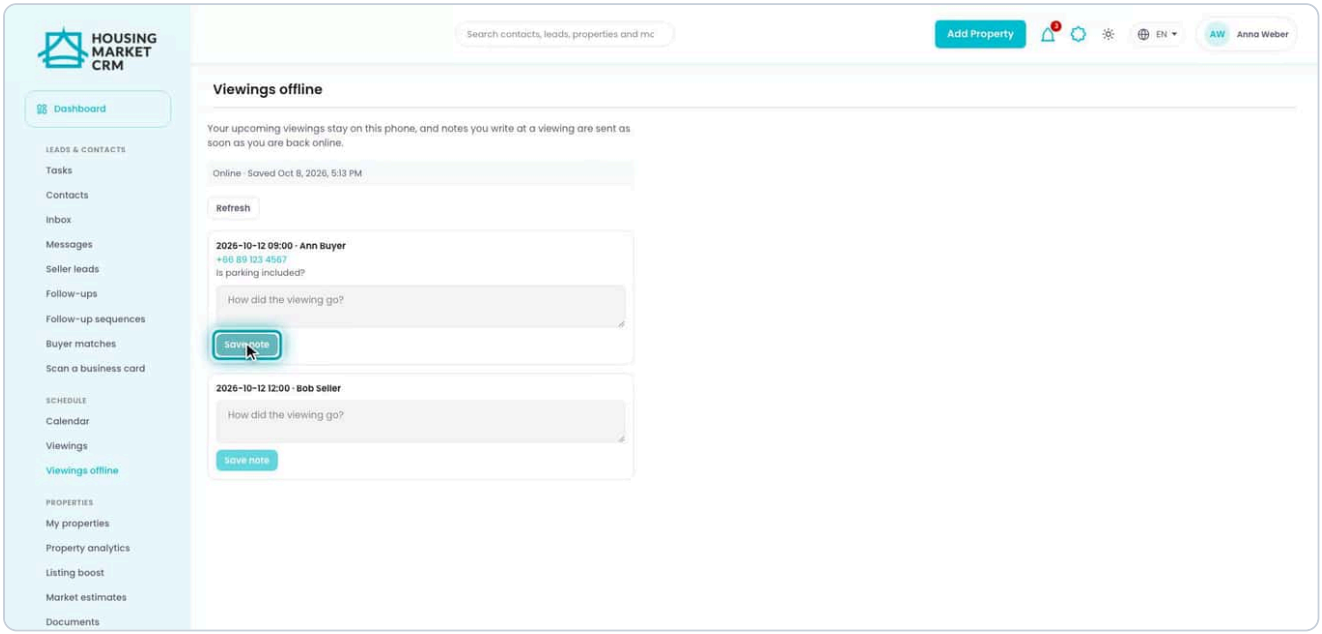


Figure 59.5 · Screen recorded 8 October 2026

6 With no signal it waits on the phone — and sends itself when you are back.

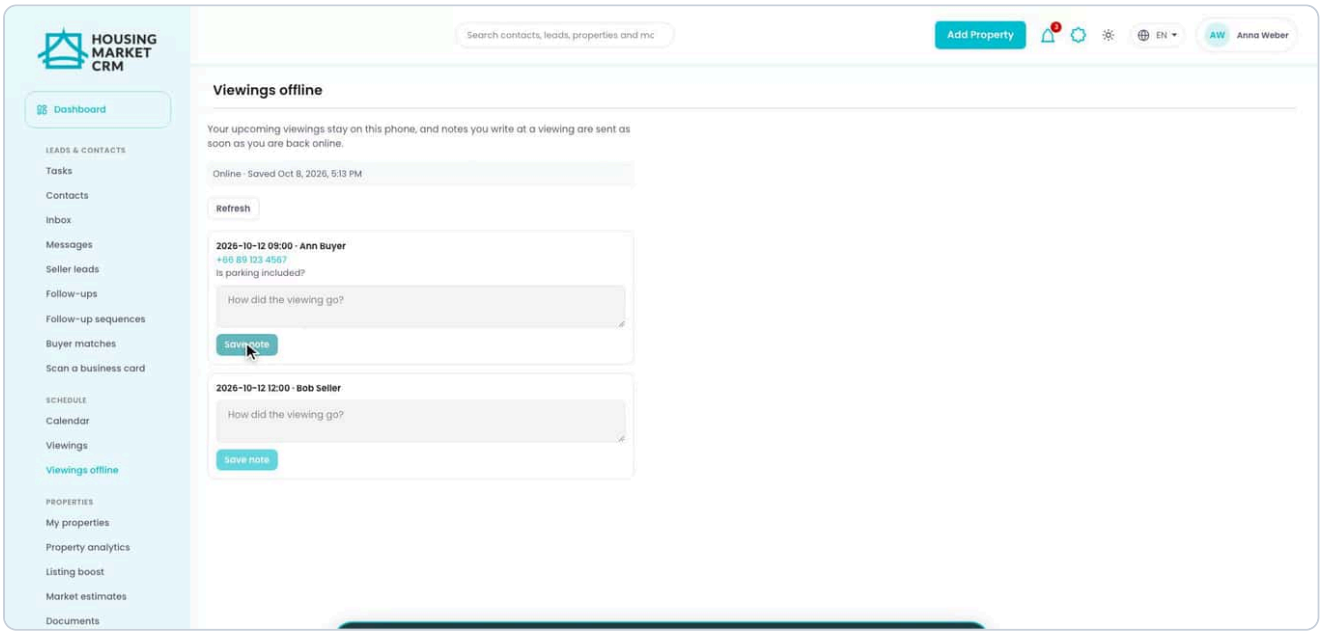


Figure 59.6 · Screen recorded 8 October 2026

7 **Refresh** once you have signal again.

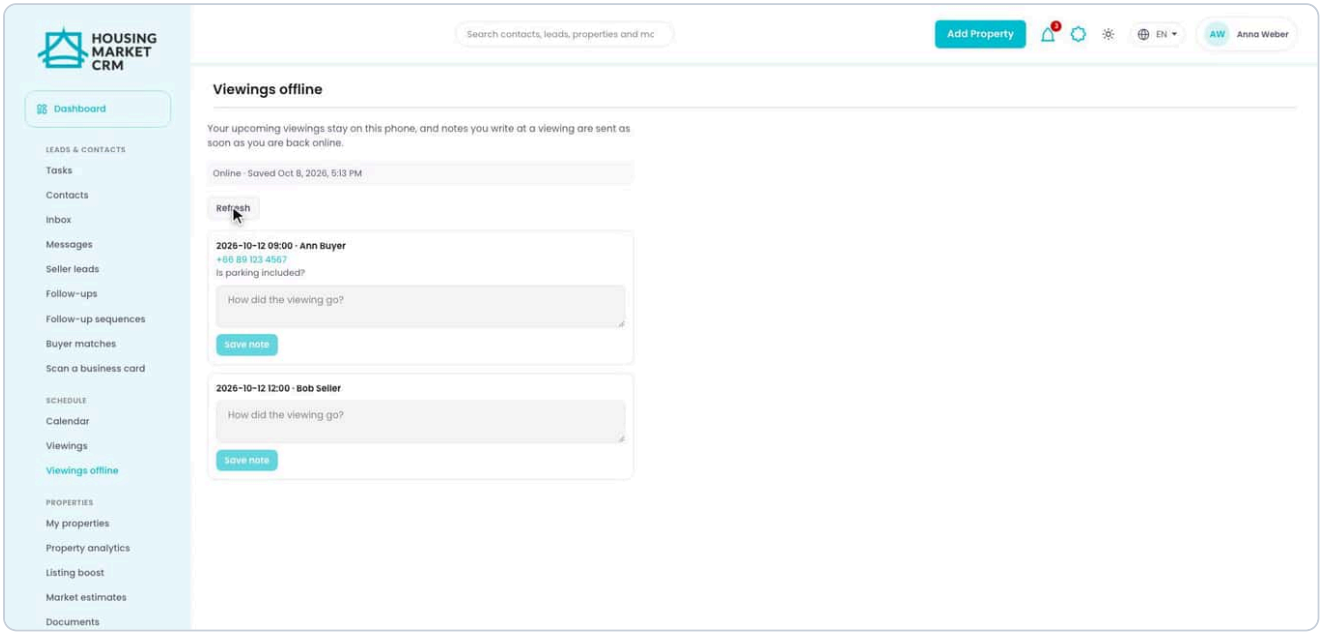


Figure 59.7 · Screen recorded 8 October 2026

8 Basements, half-built developments, a villa down a dirt road —.

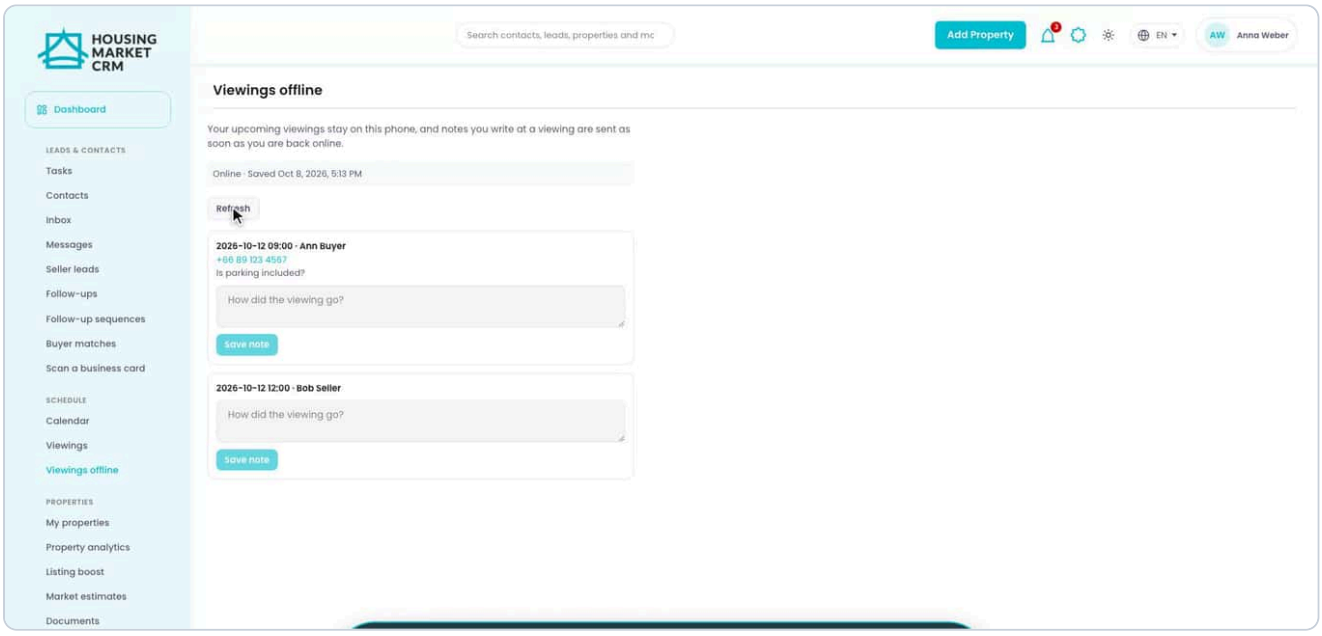


Figure 59.8 · Screen recorded 8 October 2026

9 the places you do viewings are the places with **no signal**.

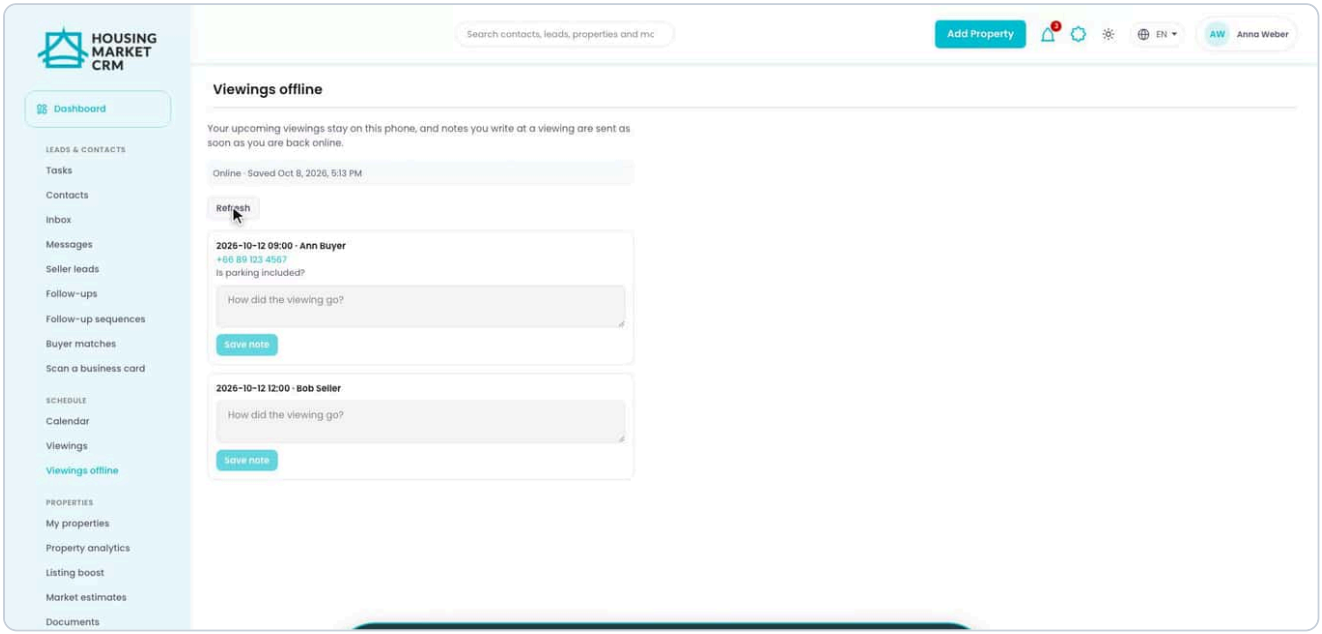


Figure 59.9 · Screen recorded 8 October 2026

GOOD TO KNOW

NOTE

Yes. Open dashboard.housingmarketcrm.com in your phone's browser: the CRM fits the screen, with a menu button, tabs along the bottom and a + button to add a property.

Help Center: Can I use Housing Market CRM on my phone?

60 CHAPTER 60

Add contacts to your mailing list

Pro and Business | For agents | Watch the video

TODO The article explains uploading a contact list under Marketing > Contacts; the video also films the Add a contact form for a single person. Add the form to the article.

OVERVIEW

On Pro, choose Marketing: upload your mailing list with consent recorded, build a campaign around your listings, send yourself a test, then send it now or schedule it.

Email campaigns are part of Pro. Choose Marketing in the left menu. The tabs Contacts, Campaigns and Suppressions are always there, and further tabs, such as Segments, Triggers, Launch kit and Results, appear when those Pro tools are open on your account. On Free the page explains the tool and offers Pro instead.

Your mailing list

The Contacts tab is your mailing list and shows who on it can be emailed. To add people, upload a contact list — a CSV, TSV or semicolon-separated file; save an Excel workbook as CSV first — and confirm which column is the email address, first name, last name and phone before anything is saved.

Tick These people agreed to hear from me and say where they agreed, such as a sign-up form or a viewing sheet. Only contacts with consent are ever emailed: without it they are saved but never sent a campaign, and you can record consent later.

Building a campaign

- Open the Campaigns tab and choose New campaign.
- Give it a name, which only you see, and a subject line, which is what the recipient sees in their inbox. Preview text and an opening message are optional.
- Choose Add a listing to feature your properties. Each card is read from the portal rather than from a saved copy, so it shows the listing as it currently is.
- Choose Save the campaign. Open it to see the preview, and choose Send myself a test to see it in your own inbox; a test is not counted in the results.

Sending it

Under Send this campaign, choose Send now, or set a time and choose Schedule it. Before you send, the screen shows how many people can be emailed and how many cannot, and why: no consent, unsubscribed, or suppressed. A scheduled campaign can be edited or cancelled until it starts sending; cancelling makes it a draft again.

Campaigns are sent from Housing Market Group's own verified address with your name on them, so there is no domain or DNS set-up on your side. Every email carries an unsubscribe link, and Results shows how many were sent, opened, clicked, bounced, marked as spam, failed or suppressed.

Suppressions

Suppressions lists the addresses nobody may email: addresses that do not exist, that marked a campaign as spam, or that unsubscribed, and any you added by hand. The list is shared across the whole platform, because everyone sends from one verified address. To add an address for someone who asked not to be emailed, choose Add an address, type it and, if you like, why. You confirm that it applies to every agent, not only to you: nobody on the platform can email it from then on, including campaigns already scheduled.

You can take back an address you added by hand: choose Remove next to it and confirm. You can remove an address you added, and so can a manager in your office. An address someone else added shows Added by someone else instead of a button, and an address that has since bounced, been marked as spam or unsubscribed stays on the list. Addresses that do not exist, that marked a campaign as spam or that unsubscribed cannot be taken off the list from the CRM, because they are the decision of the mail server or of the person, and writing to them again is what produces the next complaint.

From the Help Center: **How do I send an email campaign to my contacts?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

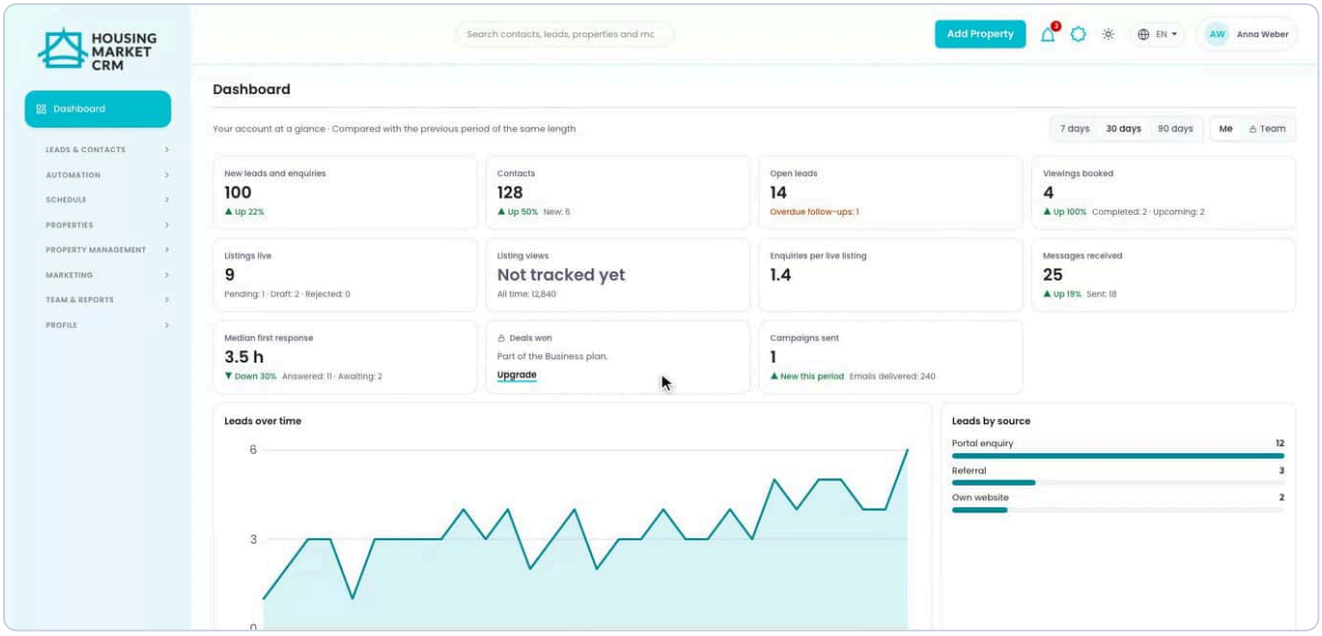


Figure 60.1 · Screen recorded 21 October 2026

2 Open the **Marketing** group in the left menu.

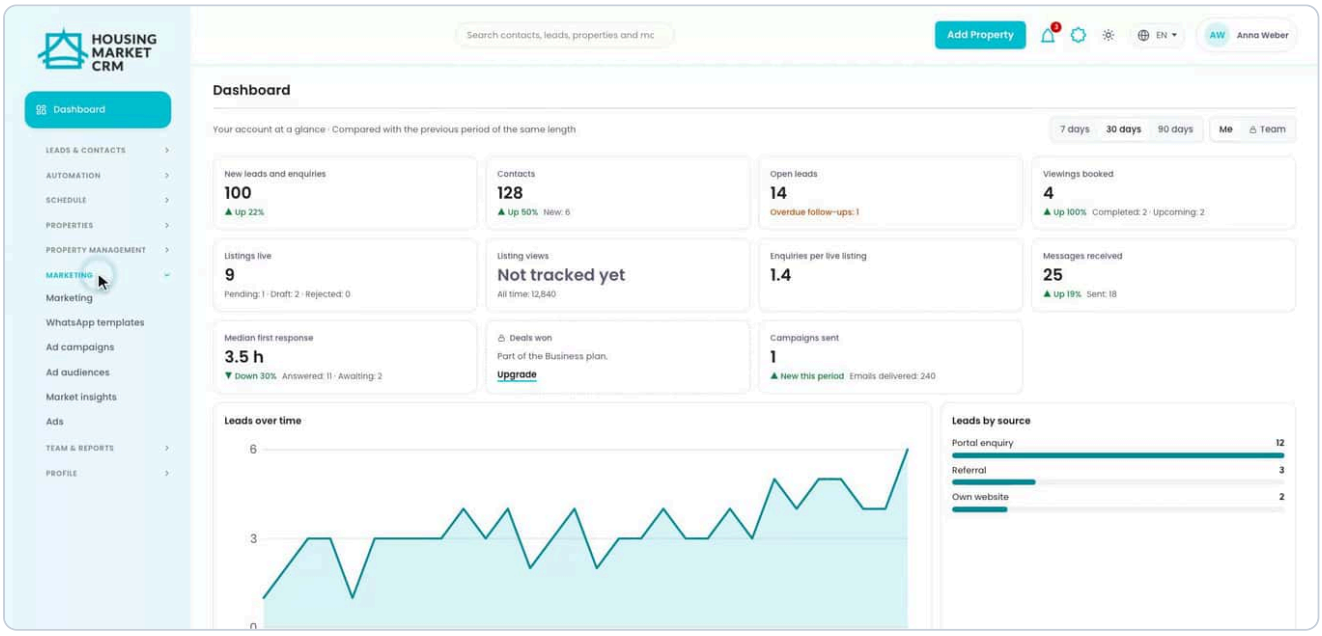


Figure 60.2 · Screen recorded 21 October 2026

3 Click **Marketing**.

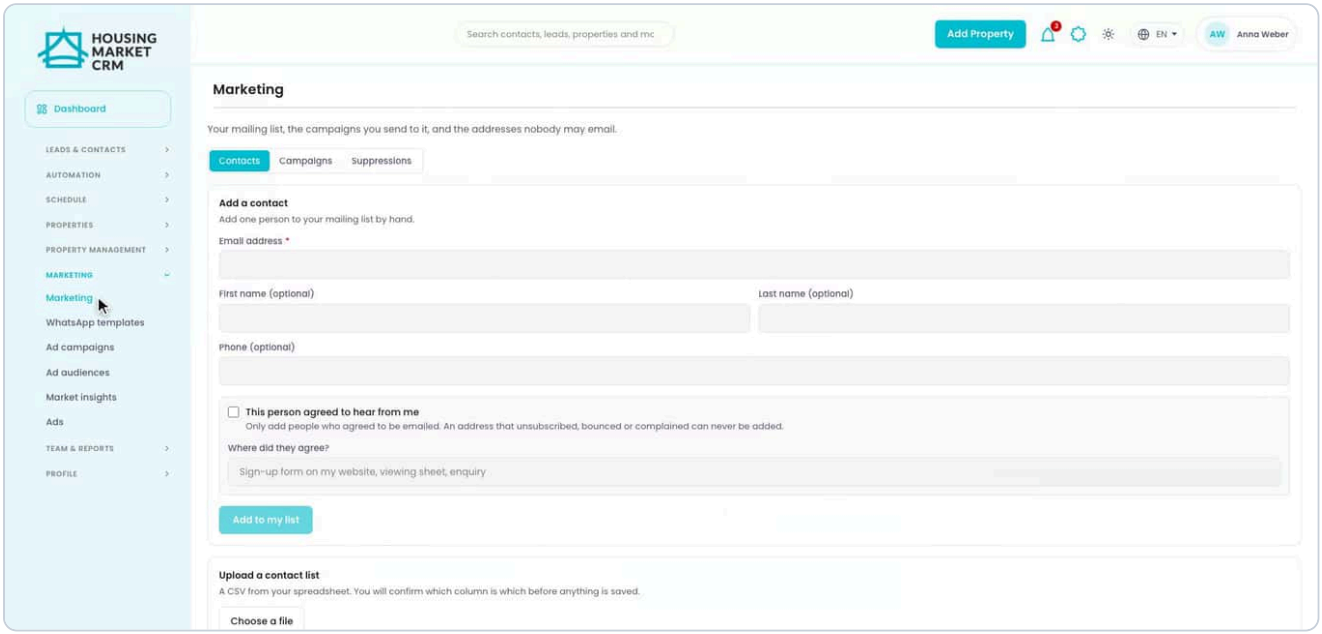


Figure 60.3 · Screen recorded 21 October 2026

4 This is your **mailing list**, with who can be emailed.

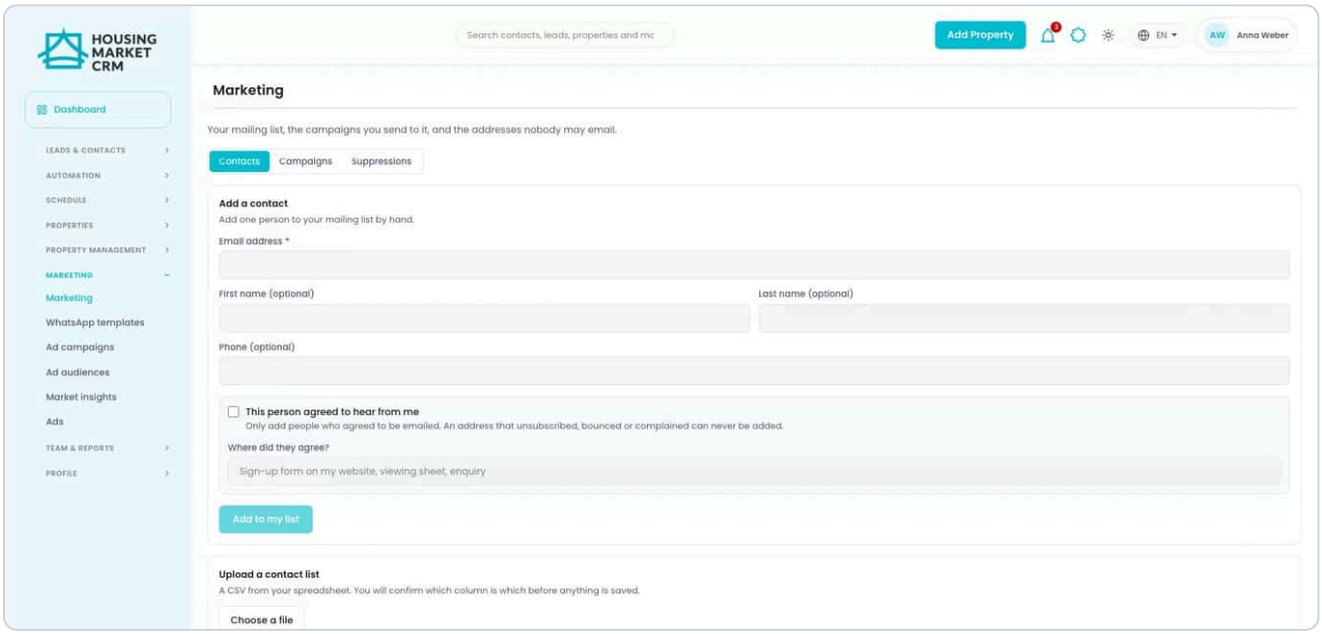


Figure 60.4 · Screen recorded 21 October 2026

5 To add one person, use **Add a contact**.

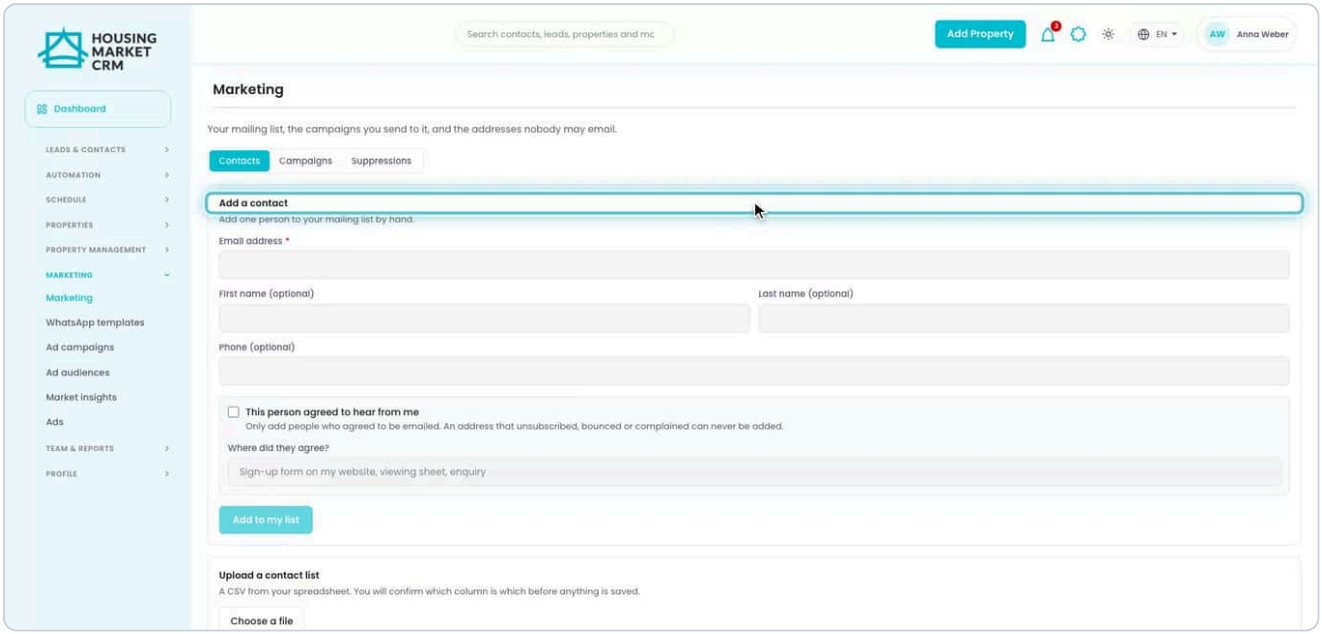


Figure 60.5 · Screen recorded 21 October 2026

6 Type their **email address** and their **name**.

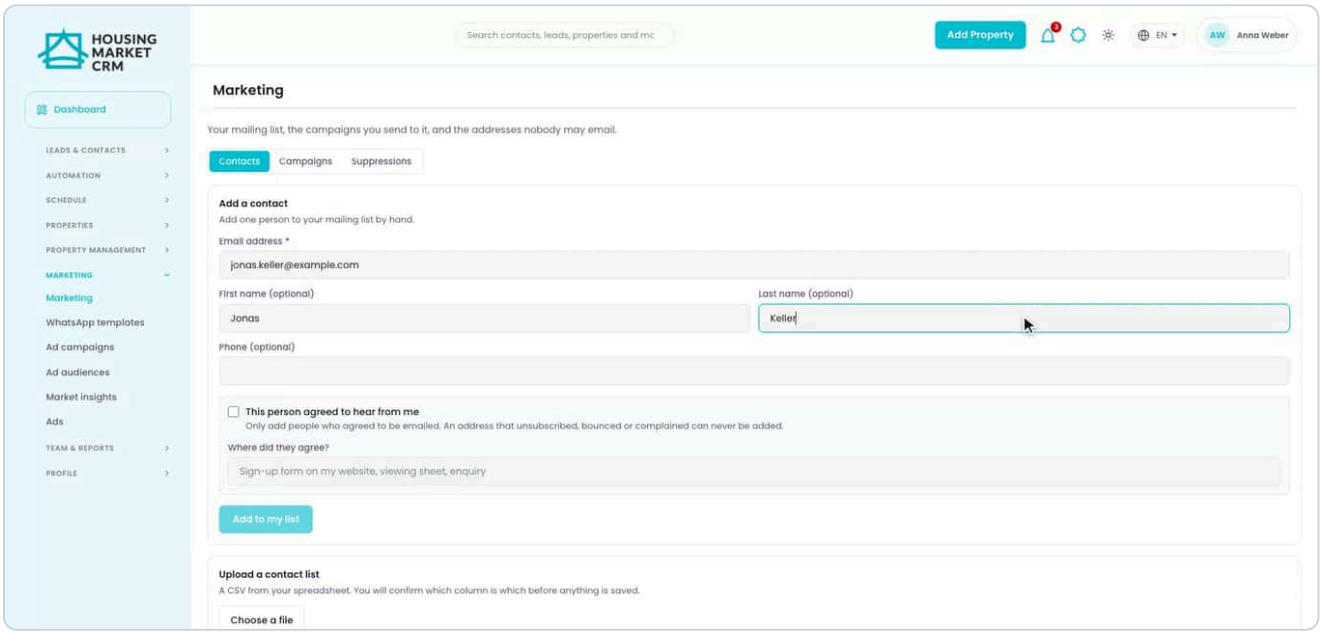


Figure 60.6 · Screen recorded 21 October 2026

7 Tick that **this person agreed to hear from you**.

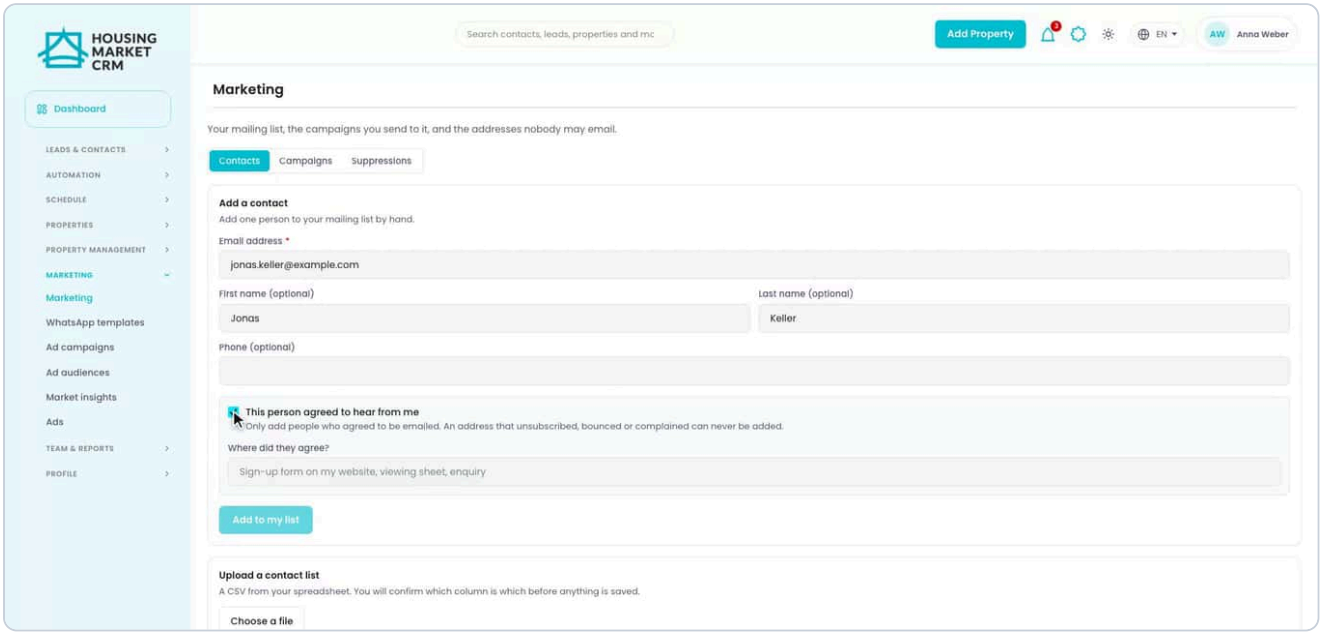


Figure 60.7 · Screen recorded 21 October 2026

8 Say **where they agreed**.

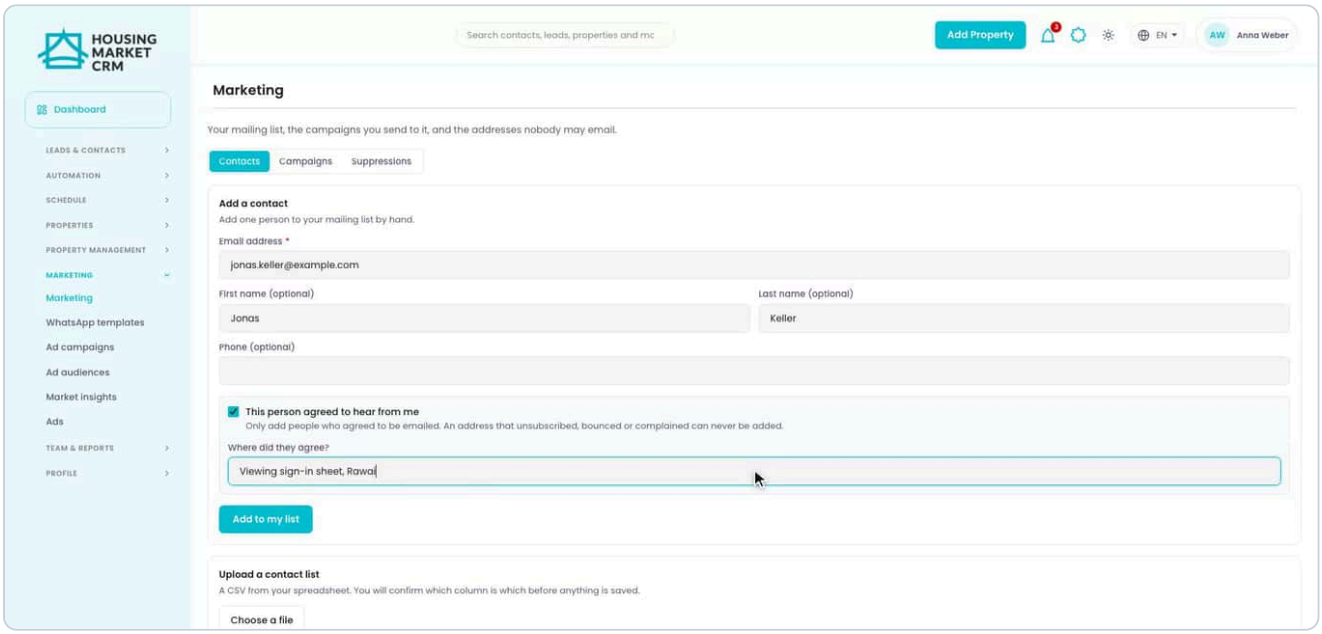


Figure 60.8 · Screen recorded 21 October 2026

9 Click **Add to my list.**

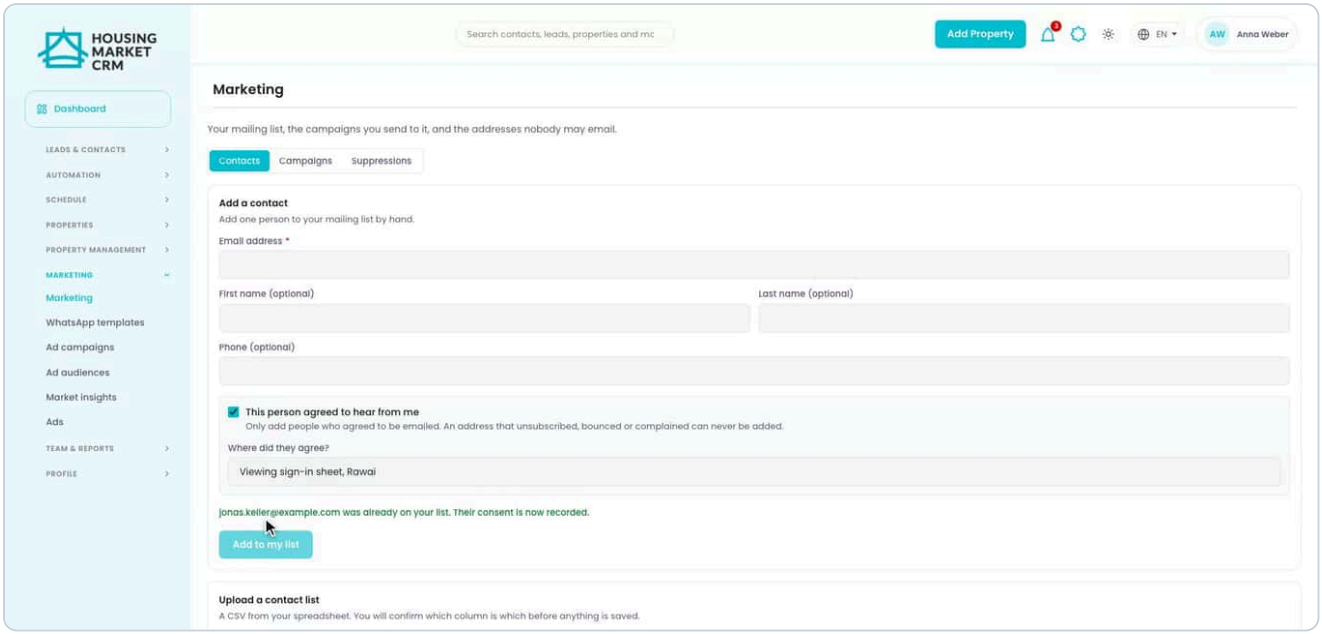


Figure 60.9 · Screen recorded 21 October 2026

10 He appears in **Your list**, with consent **recorded**.

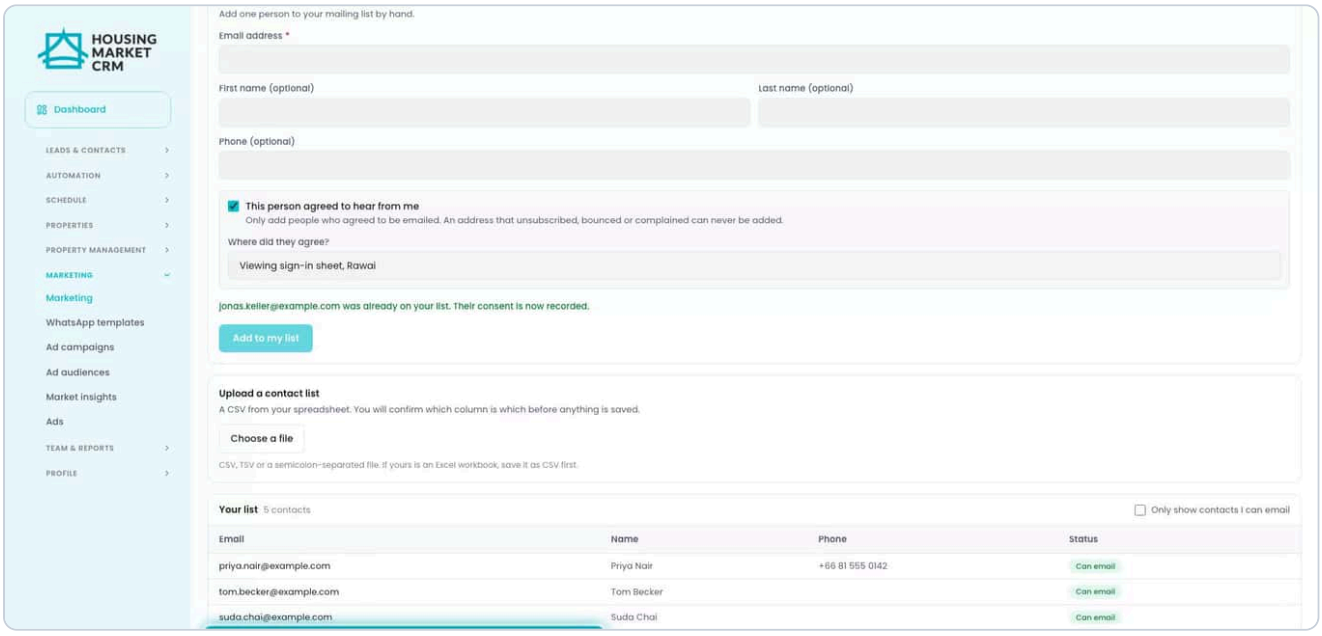


Figure 60.10 · Screen recorded 21 October 2026

11 Nothing is sent.

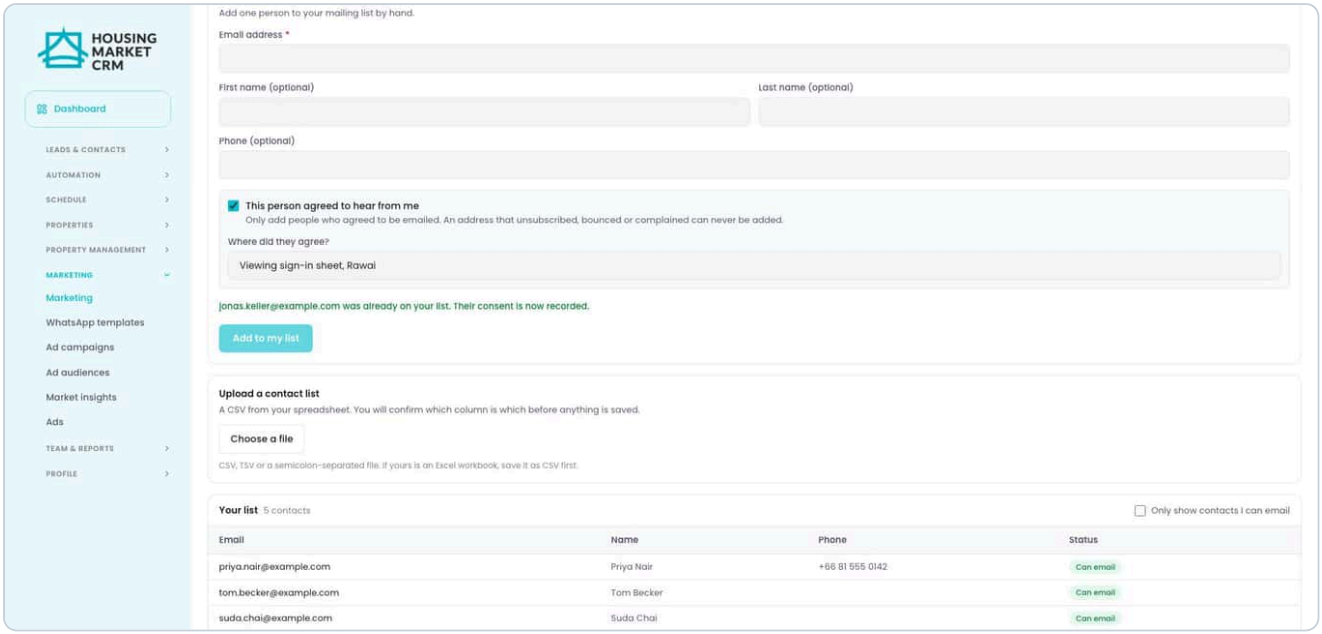


Figure 60.11 · Screen recorded 21 October 2026

12 To add people you already have, open **Contacts**.

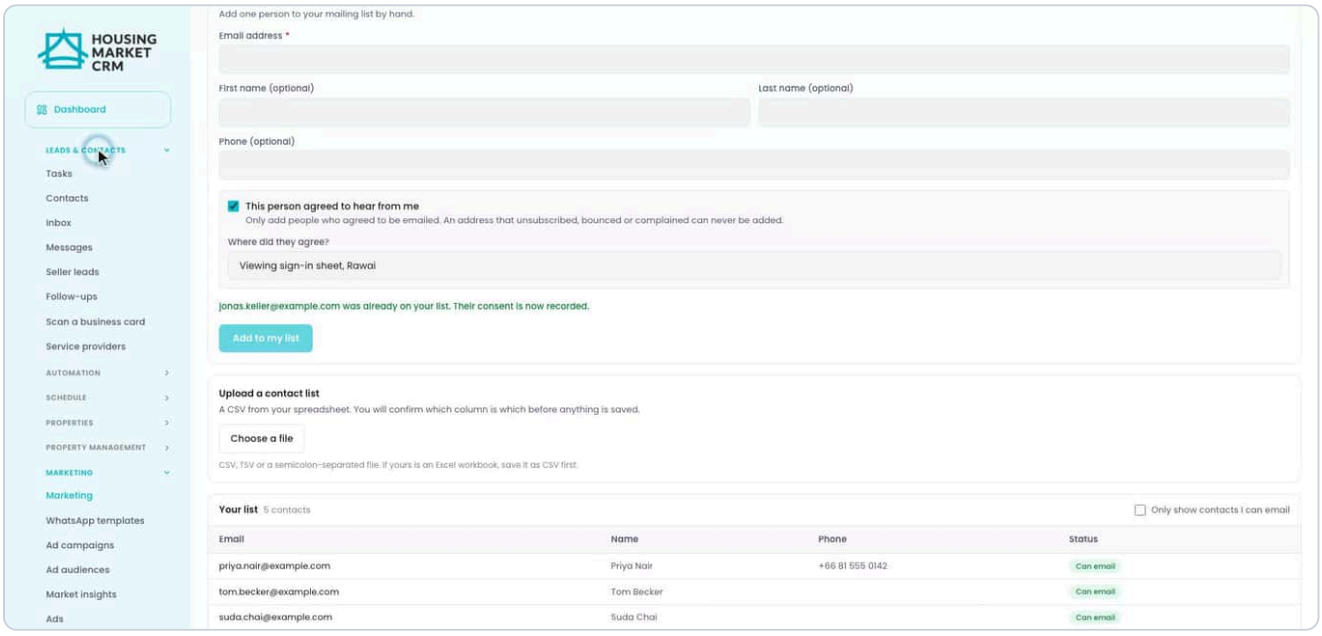


Figure 60.12 · Screen recorded 21 October 2026

13 Click **Contacts**.

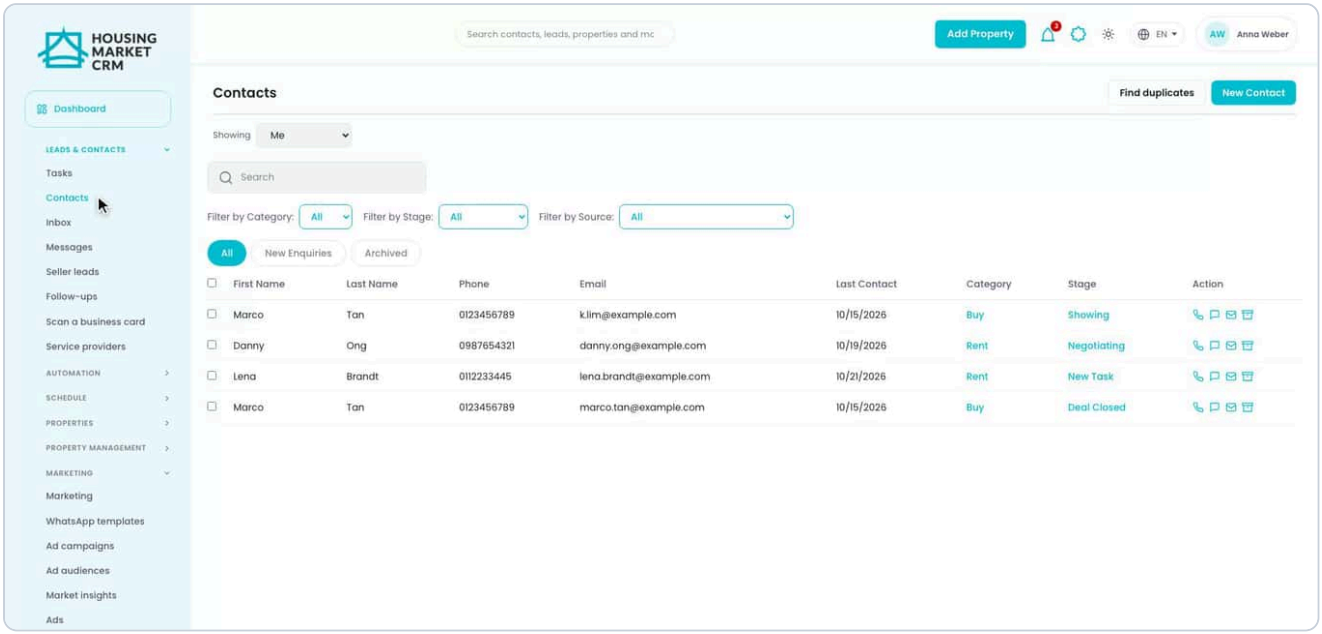


Figure 60.13 · Screen recorded 21 October 2026

14 Tick the contacts you want.

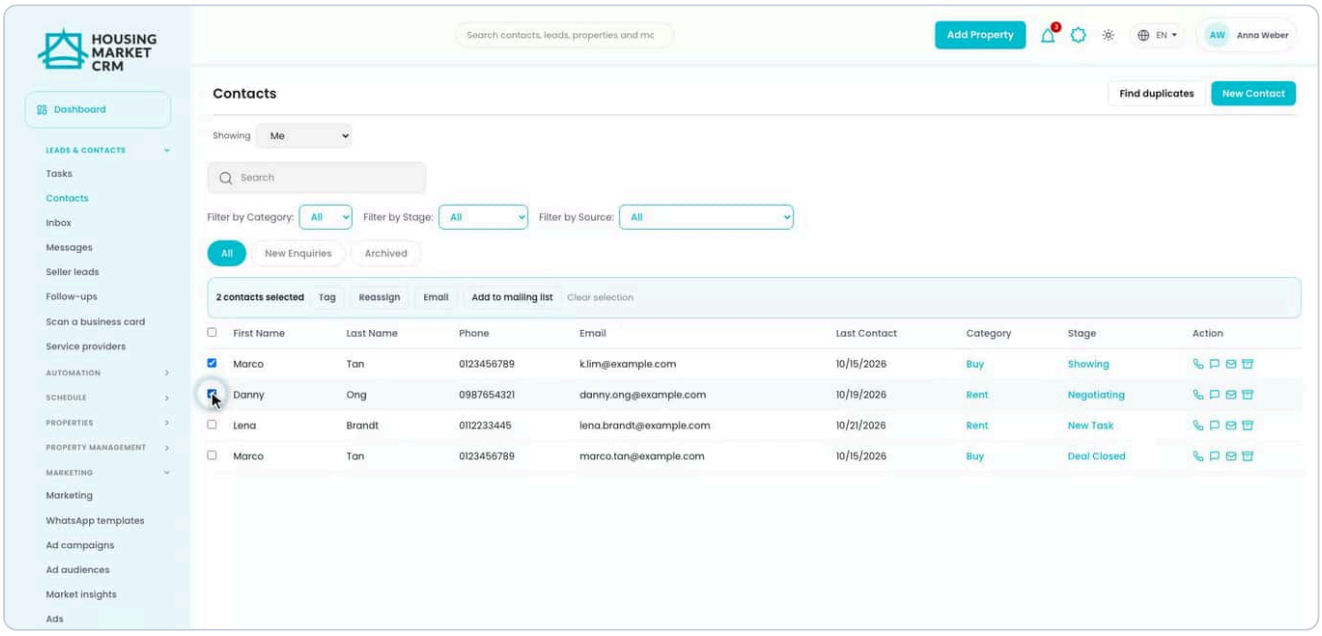


Figure 60.14 · Screen recorded 21 October 2026

15 Click **Add to mailing list**.

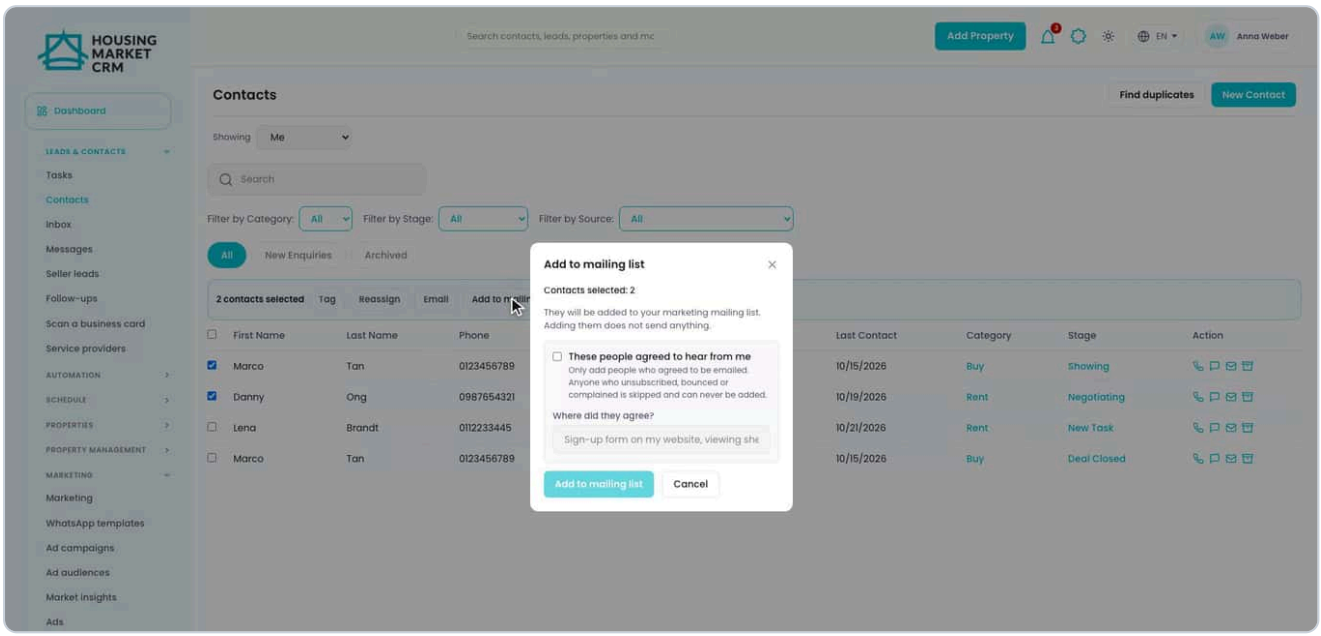


Figure 60.15 · Screen recorded 21 October 2026

16 Tick that **they agreed to hear from you**.

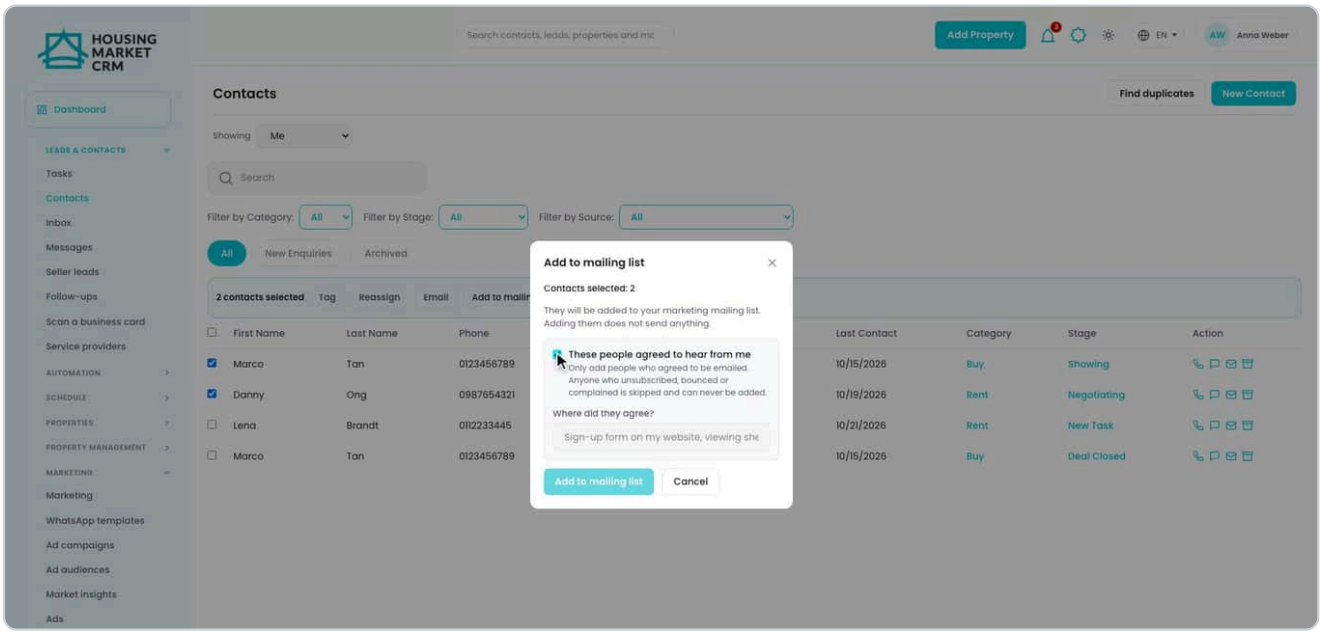


Figure 60.16 · Screen recorded 21 October 2026

17 Say **where they agreed**, once for the whole group.

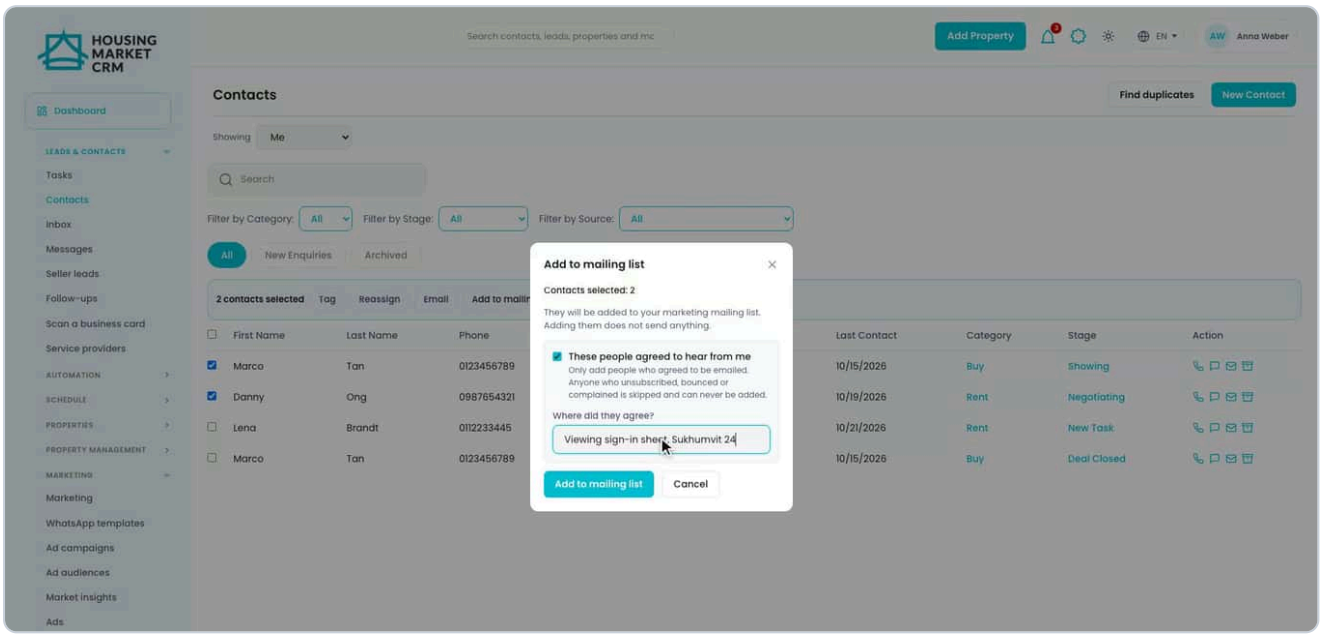


Figure 60.17 · Screen recorded 21 October 2026

18 Click **Add to mailing list**.

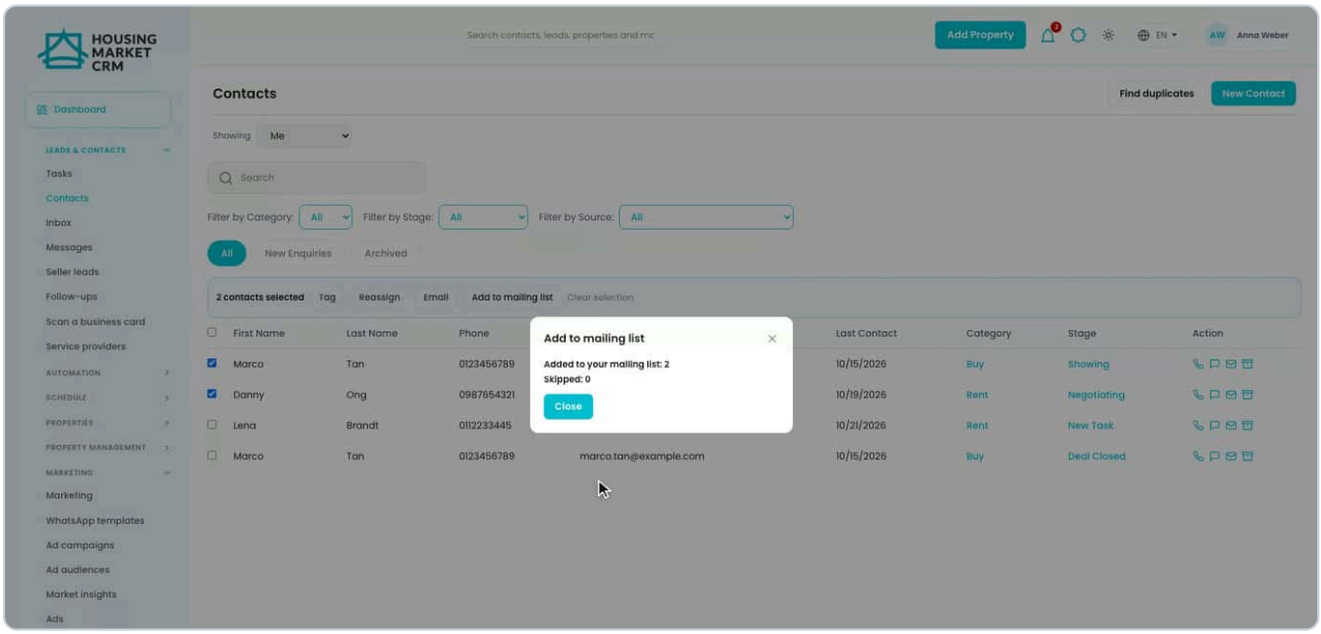


Figure 60.18 · Screen recorded 21 October 2026

19 The result **counts** who was added.

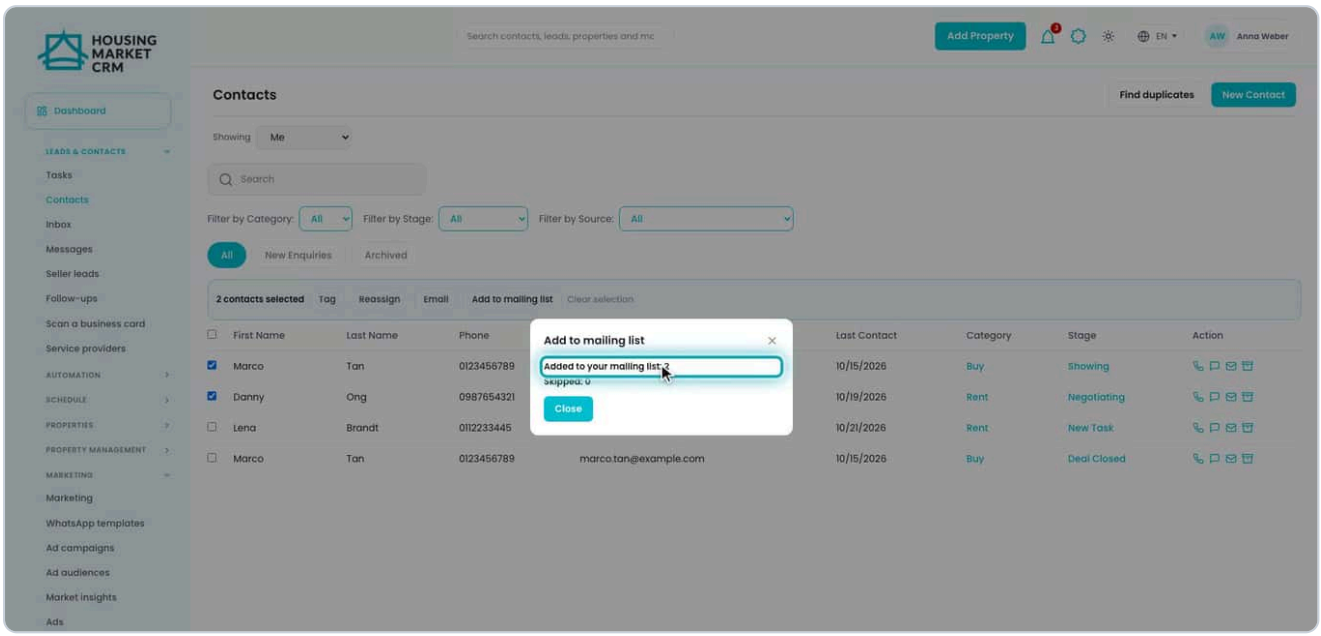


Figure 60.19 · Screen recorded 21 October 2026

20 Anyone who **unsubscribed or bounced** is skipped, and the reason is shown.

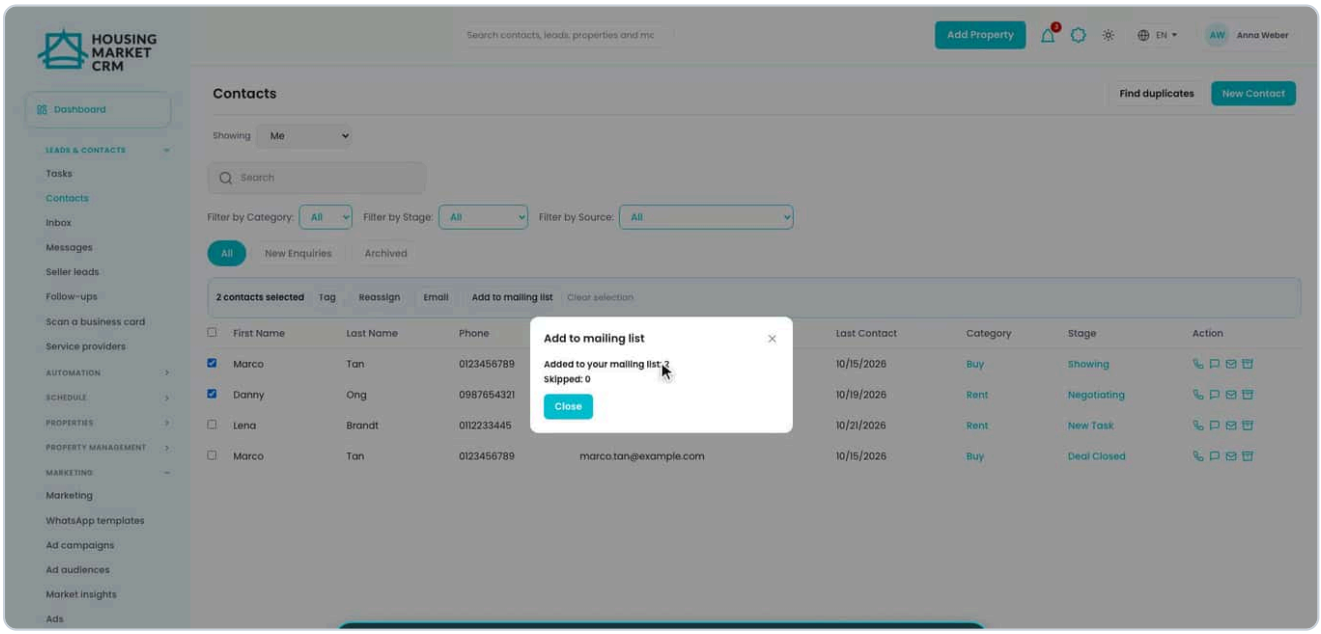


Figure 60.20 · Screen recorded 21 October 2026

RELATED HELP CENTER ARTICLES

Can I manage all my contacts? faq.housingmarketgroup.com/faq/can-i-manage-all-my-contacts

61 CHAPTER 61

How the CRM protects your email marketing

Pro and Business | For agents | Watch the video

OVERVIEW

Only contacts with consent are emailed, a daily allowance starts lower on a new account and rises step by step, a high bounce or complaint rate brings a warning and then a pause, and a shared Suppressions list stops anyone being emailed again after a bounce, complaint or unsubscribe.

Email campaigns are part of Pro. Open Marketing in the left menu. Housing Market CRM protects your sending, and your reputation with the people you write to, in four ways.

Consent comes first

Every contact on your mailing list shows why it can or cannot be emailed. Without consent, or after an unsubscribe, nobody is emailed.

A daily allowance

On the Campaigns tab your allowance shows how many emails you can still send today. A new account starts with a lower daily limit, and the limit rises step by step while bounces and spam complaints stay low, up to the limit of your plan. Each contact receives at most one marketing email a day from your account, and emails over today's limit go out the next day.

Warnings, and a pause

If your recent campaigns have a high bounce or complaint rate, the page shows a warning and asks you to remove addresses that bounce and to email only people who agreed to hear from you. If the rate rises further, marketing sending is paused until the Housing Market team has reviewed your account. Your other email, such as enquiries, password resets and notifications, keeps working.

Suppressions

The Suppressions tab lists addresses that bounced, complained or unsubscribed. The list is shared by every agent, and those addresses can never be emailed again, by anyone.

For the steps of building and sending a campaign, read "How do I send an email campaign to my contacts?".

From the Help Center: **How does the CRM protect my email marketing?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

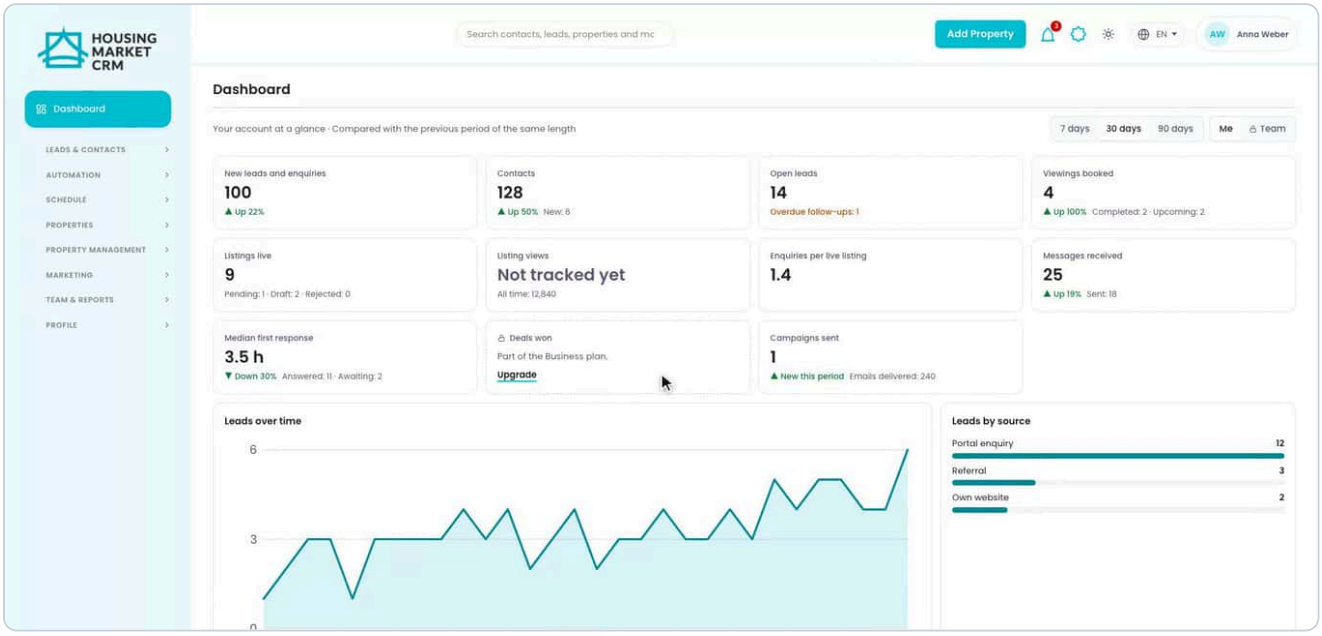


Figure 61.1 · Screen recorded 21 October 2026

2 Open the **Marketing** group in the left menu.

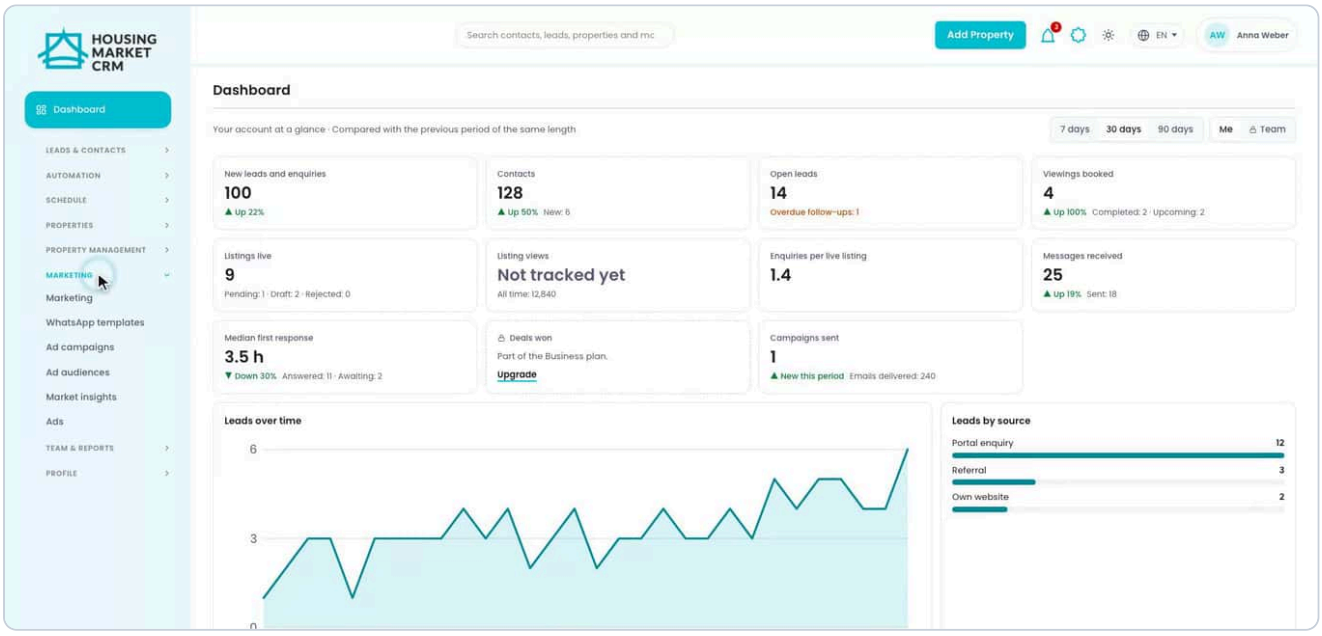


Figure 61.2 · Screen recorded 21 October 2026

3 Click **Marketing**.

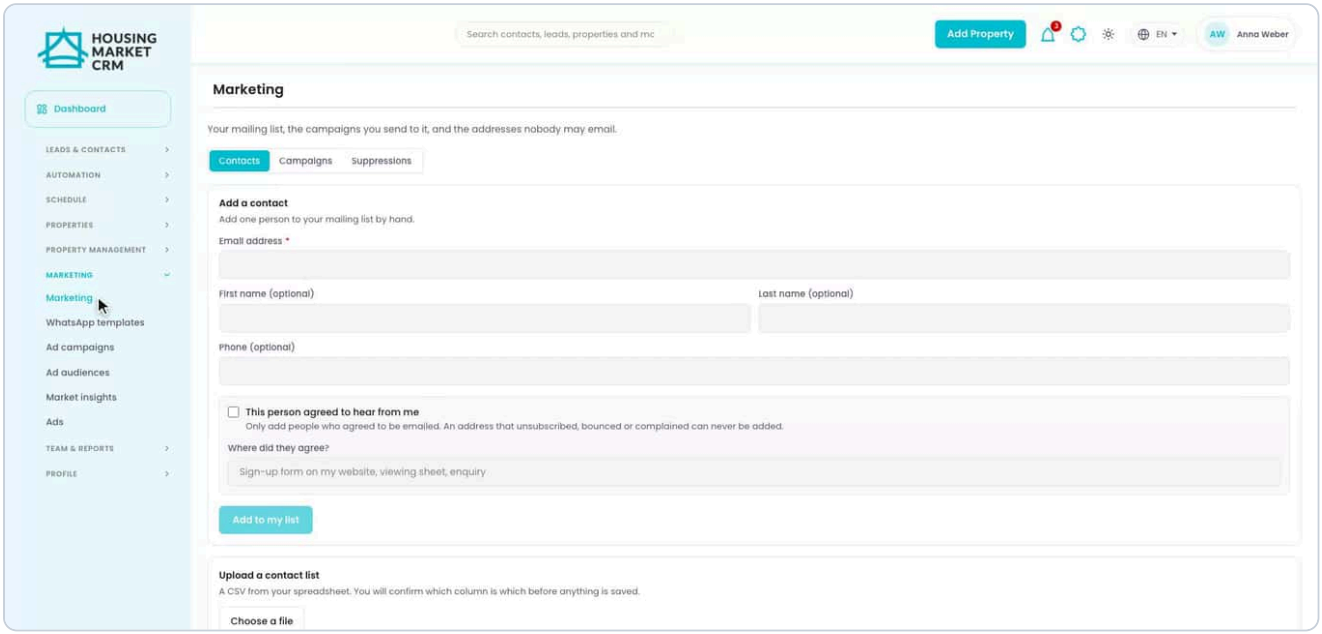


Figure 61.3 · Screen recorded 21 October 2026

4 Every contact shows **why** it can or cannot be emailed.

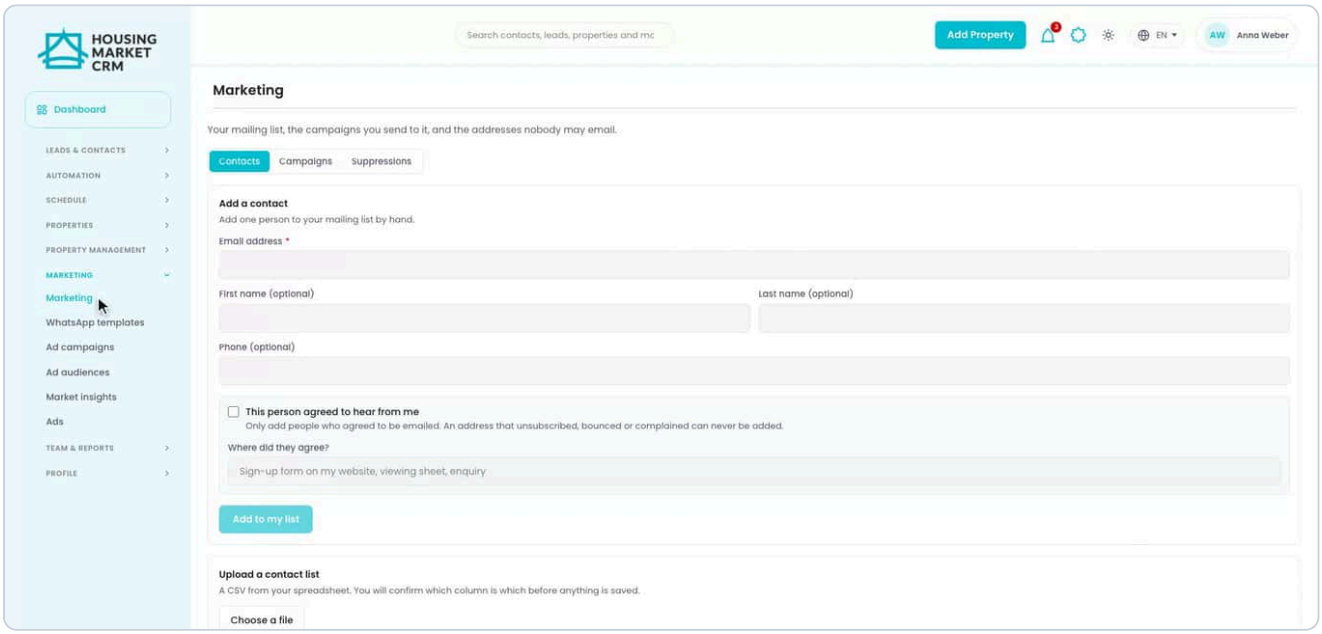


Figure 61.4 · Screen recorded 21 October 2026

5 Without **consent**, or after an **unsubscribe**, nobody is emailed.

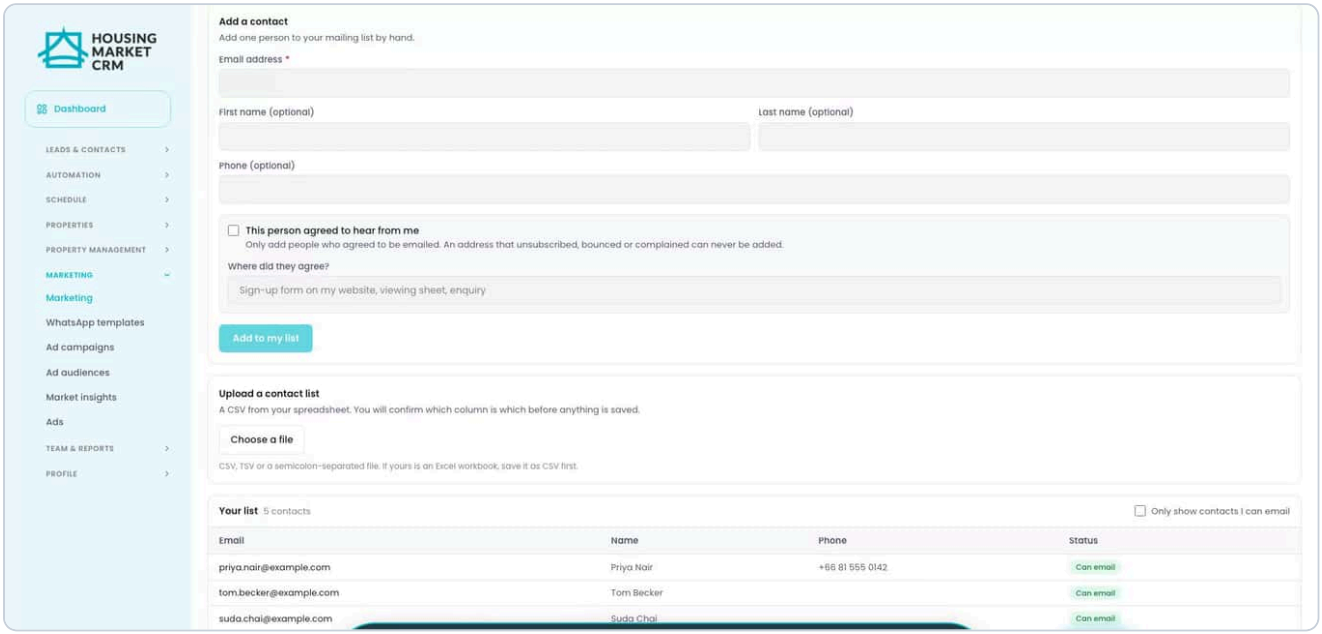


Figure 61.5 · Screen recorded 21 October 2026

6 Open the **Campaigns** tab.

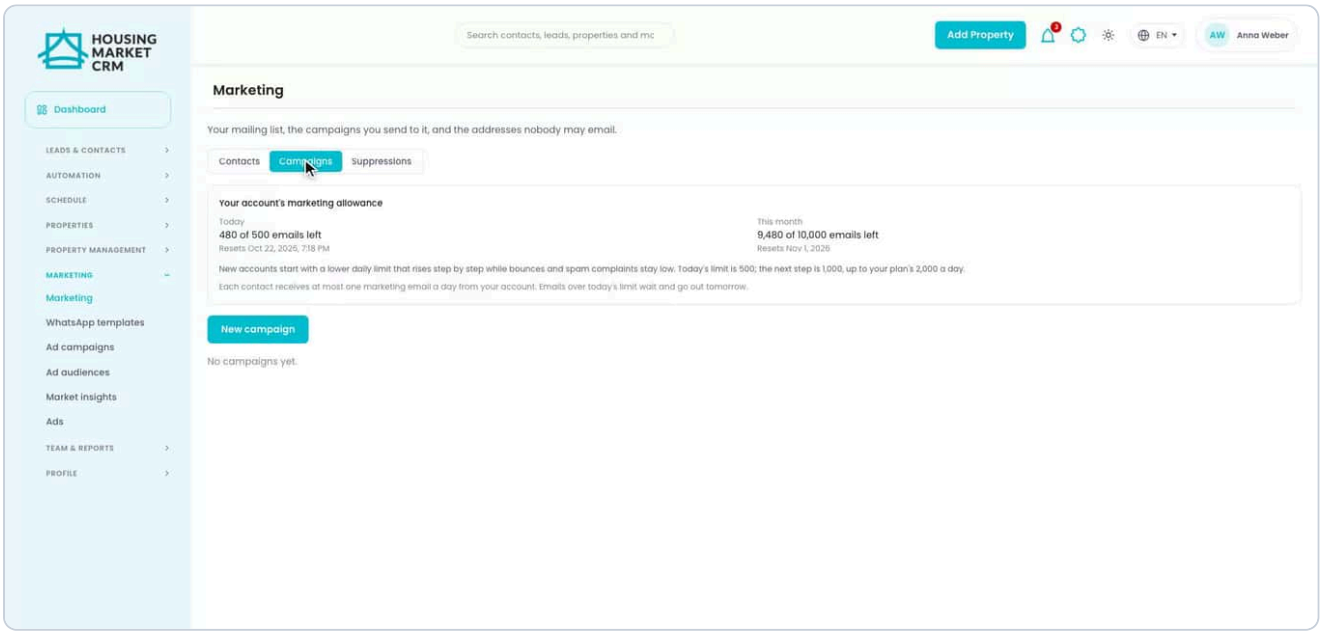


Figure 61.6 · Screen recorded 21 October 2026

7 Your **allowance** shows how many emails you can still send.

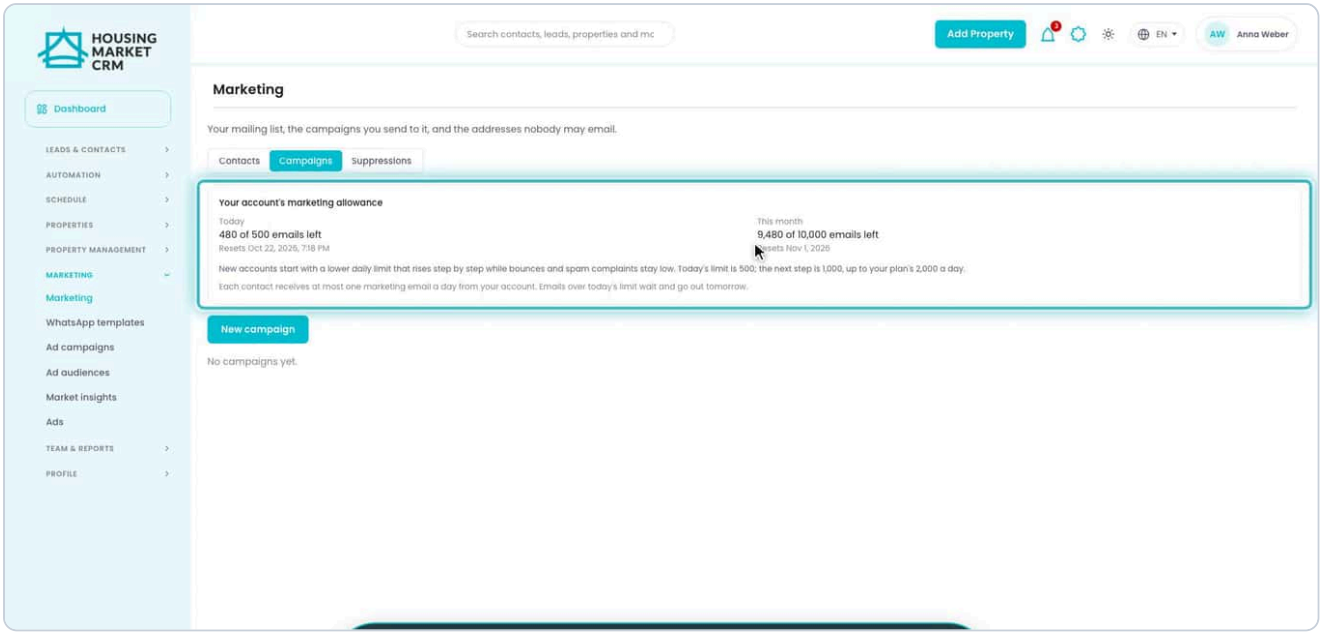


Figure 61.7 · Screen recorded 21 October 2026

8 New accounts start **lower**, and the limit rises step by step.

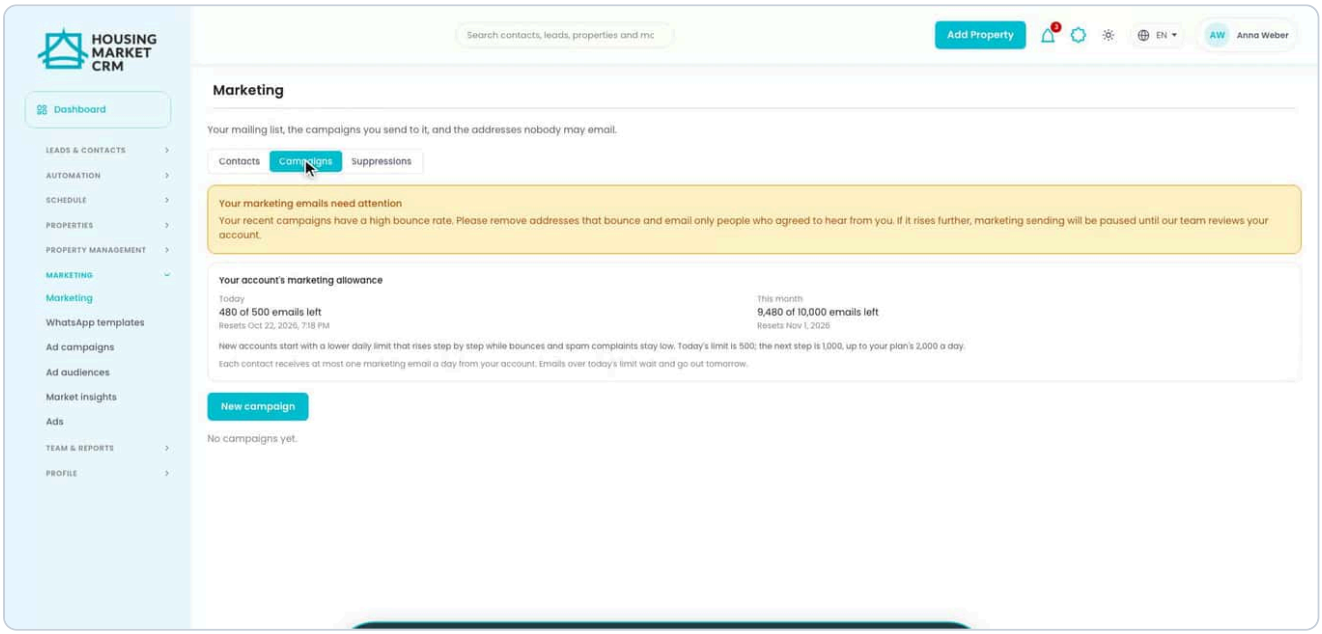


Figure 61.8 · Screen recorded 21 October 2026

9 A high **bounce** or **complaint** rate brings a **warning**.

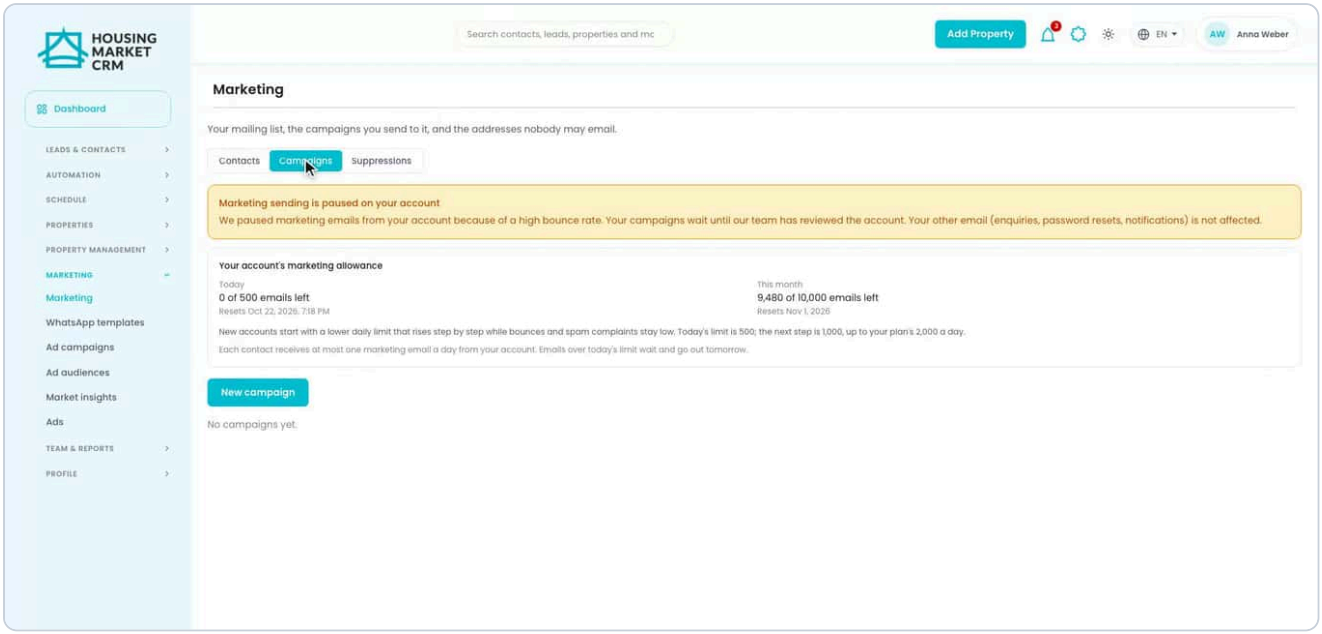


Figure 61.9 · Screen recorded 21 October 2026

10 If it rises further, marketing is **paused** until the team reviews it.

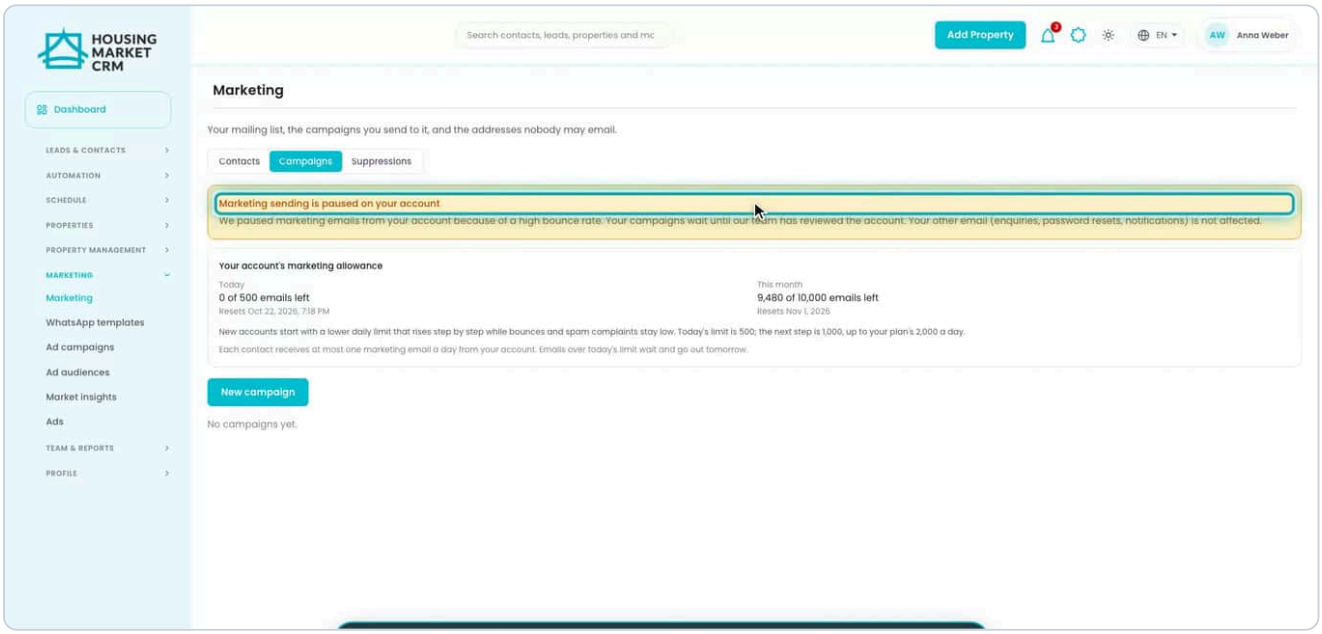


Figure 61.10 · Screen recorded 21 October 2026

11 Enquiries, password resets and notifications keep working.

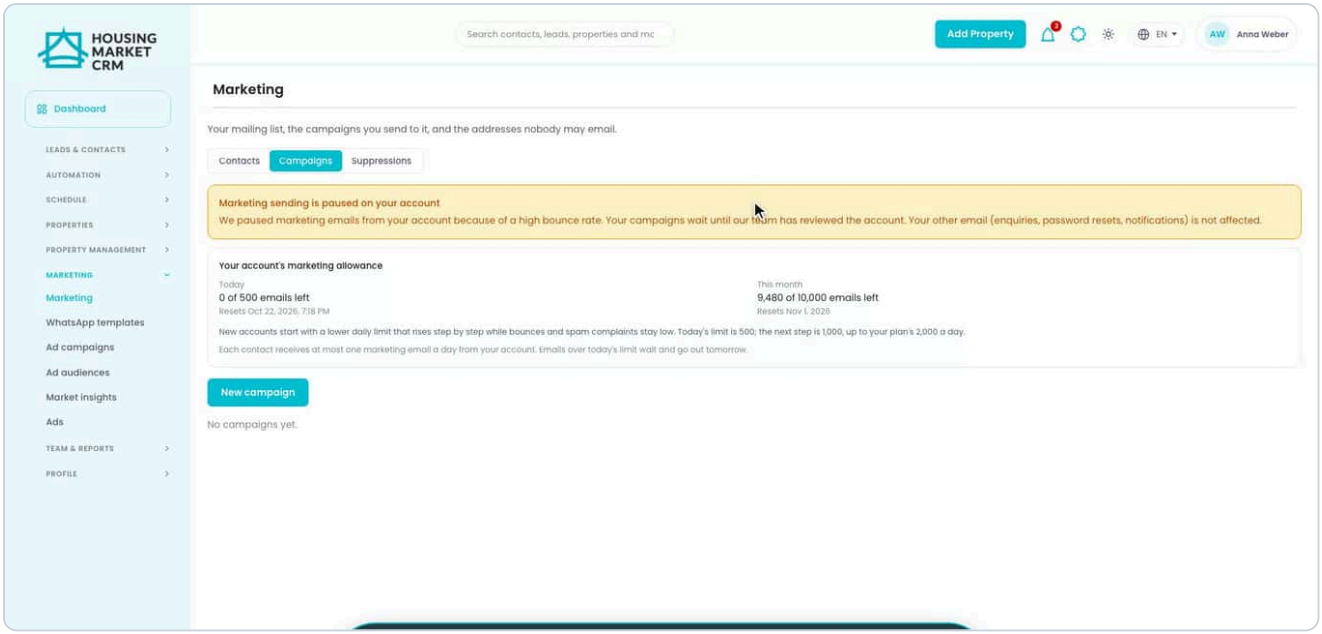


Figure 61.11 · Screen recorded 21 October 2026

12 Open the Suppressions tab.

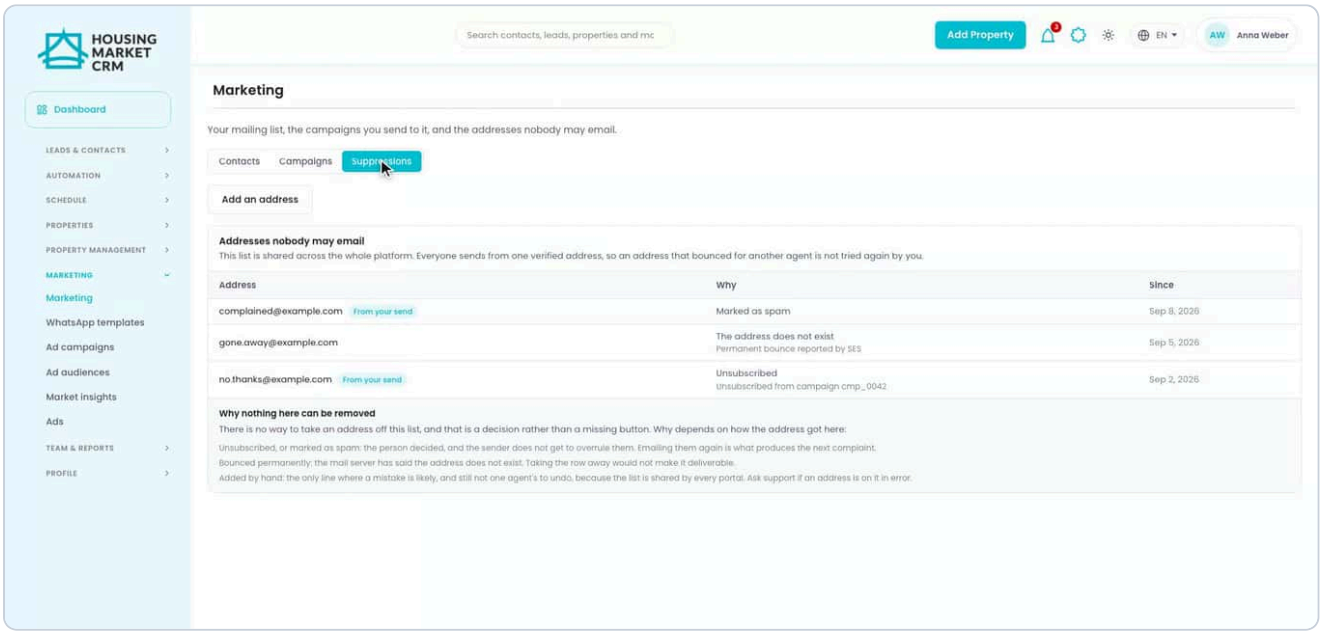


Figure 61.12 · Screen recorded 21 October 2026

13 Addresses that **bounced, complained or unsubscribed** are shared by every agent.

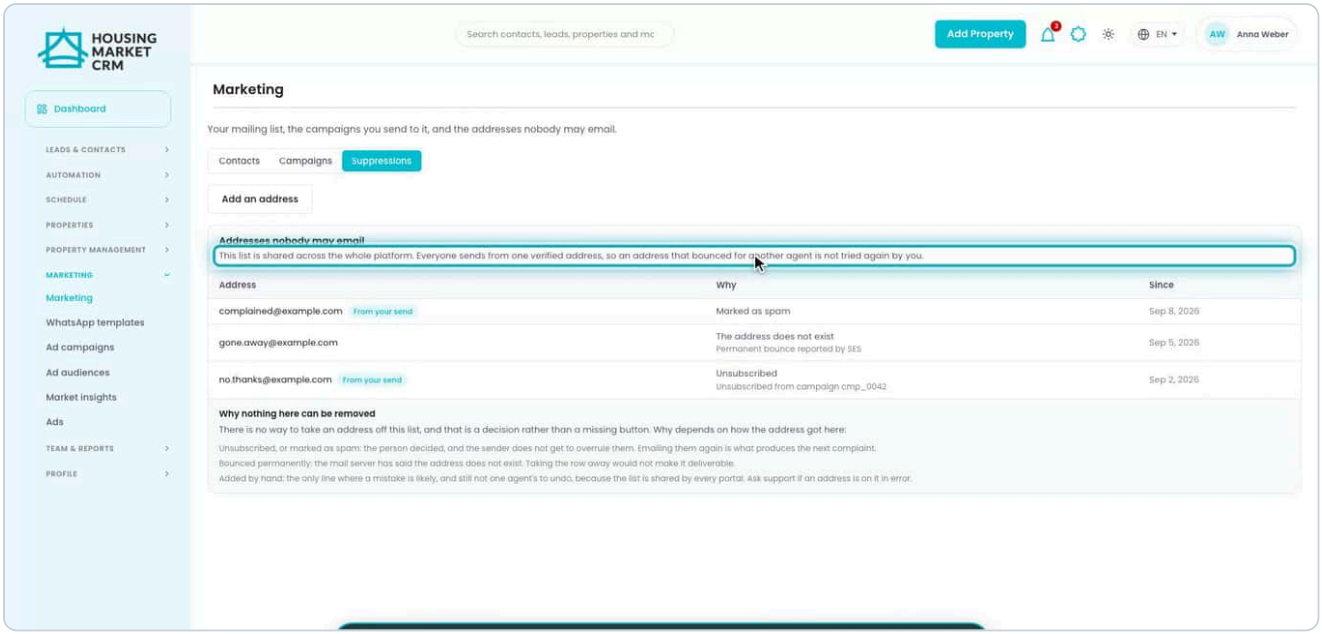


Figure 61.13 · Screen recorded 21 October 2026

14 They can **never** be emailed again, by anyone.

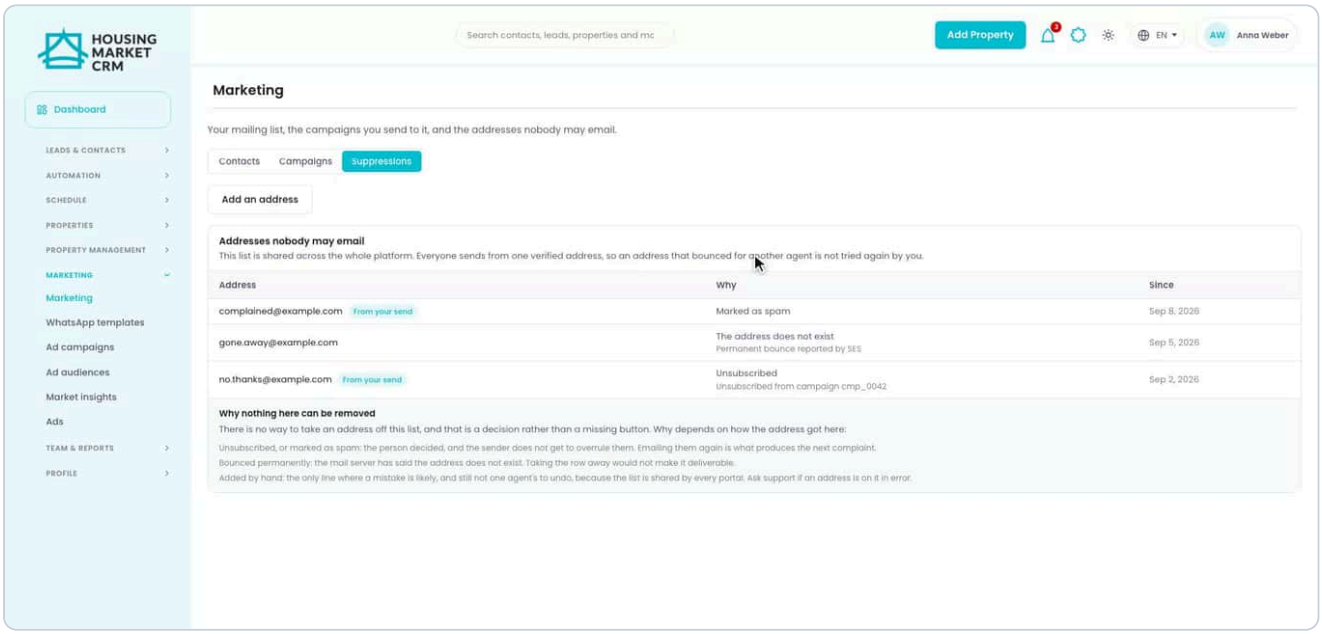


Figure 61.14 · Screen recorded 21 October 2026

RELATED HELP CENTER ARTICLES

How do I send an email campaign to my contacts?	faq.housingmarketgroup.com/faq/how-do-i-send-an-email-campaign
How does nurture work?	faq.housingmarketgroup.com/faq/how-does-nurture-work

62 CHAPTER 62

Send an email campaign

Pro and Business | For agents | Watch the video

TODO This is the Pro campaign builder (four templates, branding, live-listing picker). The older Send a bulk email chapter covers the same Marketing tool in an earlier recording; keep one and retire the other once the older video is withdrawn.

OVERVIEW

On Pro, choose Marketing: upload your mailing list with consent recorded, build a campaign around your listings, send yourself a test, then send it now or schedule it.

Email campaigns are part of Pro. Choose Marketing in the left menu. The tabs Contacts, Campaigns and Suppressions are always there, and further tabs, such as Segments, Triggers, Launch kit and Results, appear when those Pro tools are open on your account. On Free the page explains the tool and offers Pro instead.

Your mailing list

The Contacts tab is your mailing list and shows who on it can be emailed. To add people, upload a contact list — a CSV, TSV or semicolon-separated file; save an Excel workbook as CSV first — and confirm which column is the email address, first name, last name and phone before anything is saved.

Tick These people agreed to hear from me and say where they agreed, such as a sign-up form or a viewing sheet. Only contacts with consent are ever emailed: without it they are saved but never sent a campaign, and you can record consent later.

Building a campaign

- Open the Campaigns tab and choose New campaign.
- Give it a name, which only you see, and a subject line, which is what the recipient sees in their inbox. Preview text and an opening message are optional.
- Choose Add a listing to feature your properties. Each card is read from the portal rather than from a saved copy, so it shows the listing as it currently is.
- Choose Save the campaign. Open it to see the preview, and choose Send myself a test to see it in your own inbox; a test is not counted in the results.

Sending it

Under Send this campaign, choose Send now, or set a time and choose Schedule it. Before you send, the screen shows how many people can be emailed and how many cannot, and why: no consent, unsubscribed, or suppressed. A scheduled campaign can be edited or cancelled until it starts sending; cancelling makes it a draft again.

Campaigns are sent from Housing Market Group's own verified address with your name on them, so there is no domain or DNS set-up on your side. Every email carries an unsubscribe link, and Results shows how many were sent, opened, clicked, bounced, marked as spam, failed or suppressed.

Suppressions

Suppressions lists the addresses nobody may email: addresses that do not exist, that marked a campaign as spam, or that unsubscribed, and any you added by hand. The list is shared across the whole platform, because everyone sends from one verified address. To add an address for someone who asked not to be emailed, choose Add an address, type it and, if you like, why. You confirm that it applies to every agent, not only to you: nobody on the platform can email it from then on, including campaigns already scheduled.

You can take back an address you added by hand: choose Remove next to it and confirm. You can remove an address you added, and so can a manager in your office. An address someone else added shows Added by someone else instead of a button, and an address that has since bounced, been marked as spam or unsubscribed stays on the list. Addresses that do not exist, that marked a campaign as spam or that unsubscribed cannot be taken off the list from the CRM, because they are the decision of the mail server or of the person, and writing to them again is what produces the next complaint.

From the Help Center: **How do I send an email campaign to my contacts?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

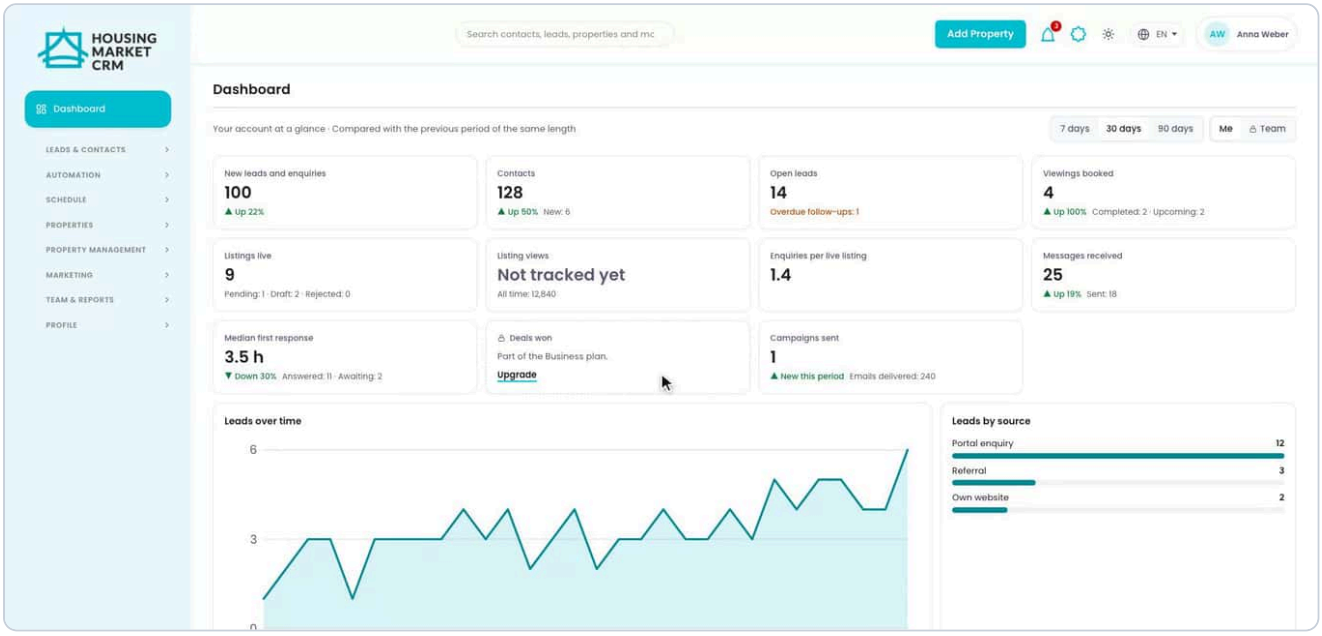


Figure 62.1 · Screen recorded 23 October 2026

2 Open **Marketing** in the left menu.

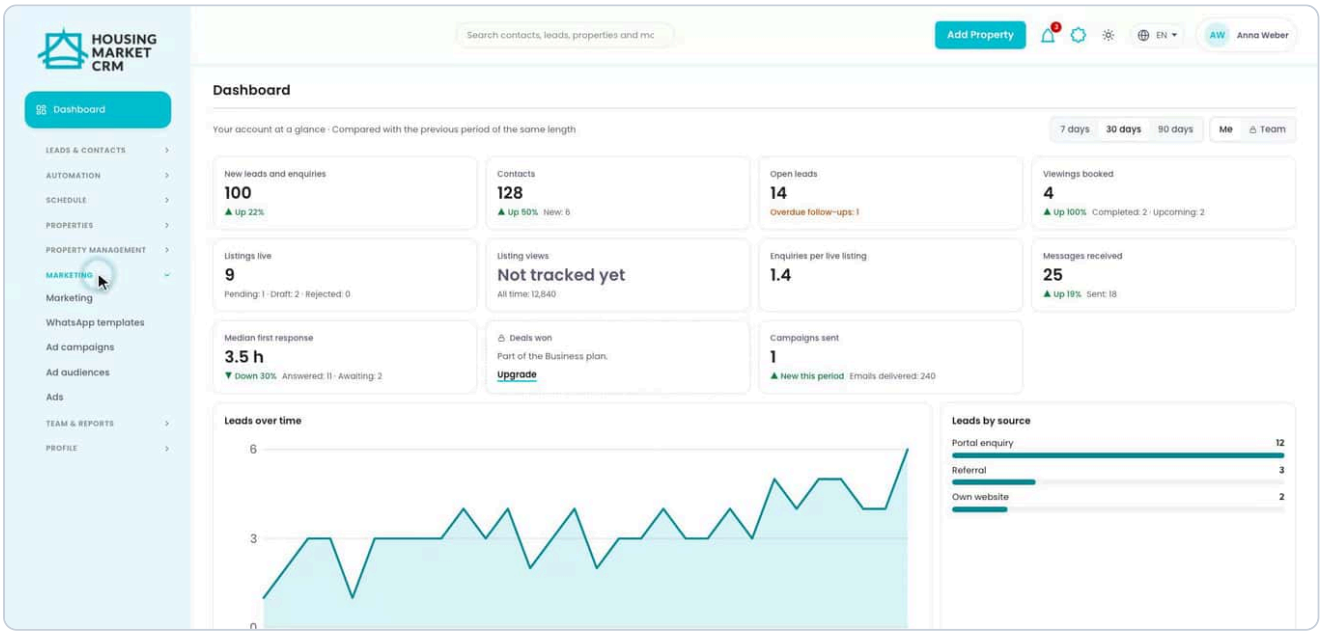


Figure 62.2 · Screen recorded 23 October 2026

3 Click **Marketing**.

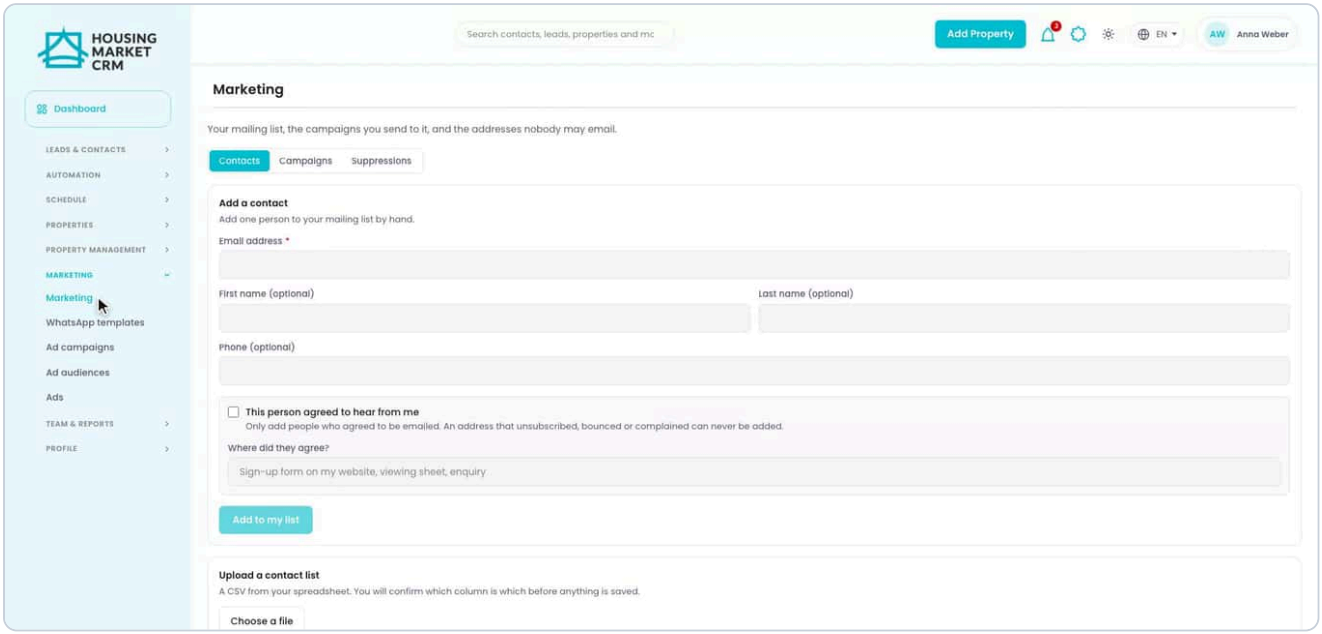


Figure 62.3 · Screen recorded 23 October 2026

4 Open the **Campaigns** tab.

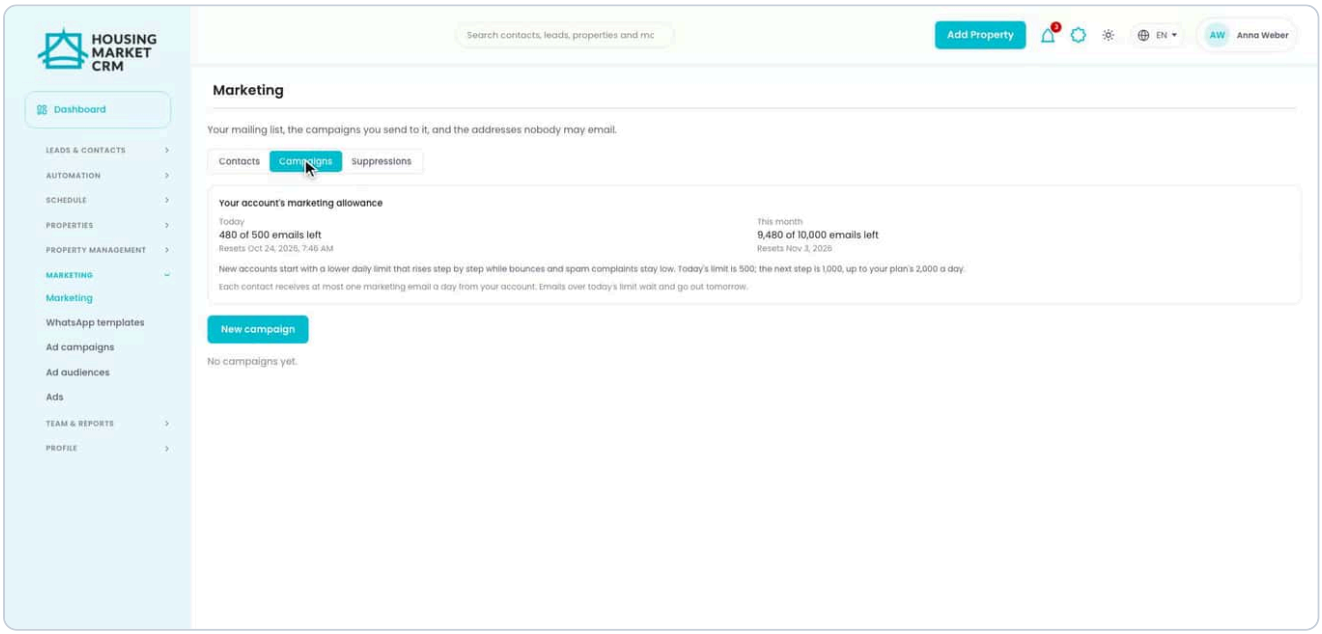


Figure 62.4 · Screen recorded 23 October 2026

5 The banner shows how many emails you can **still send today**.

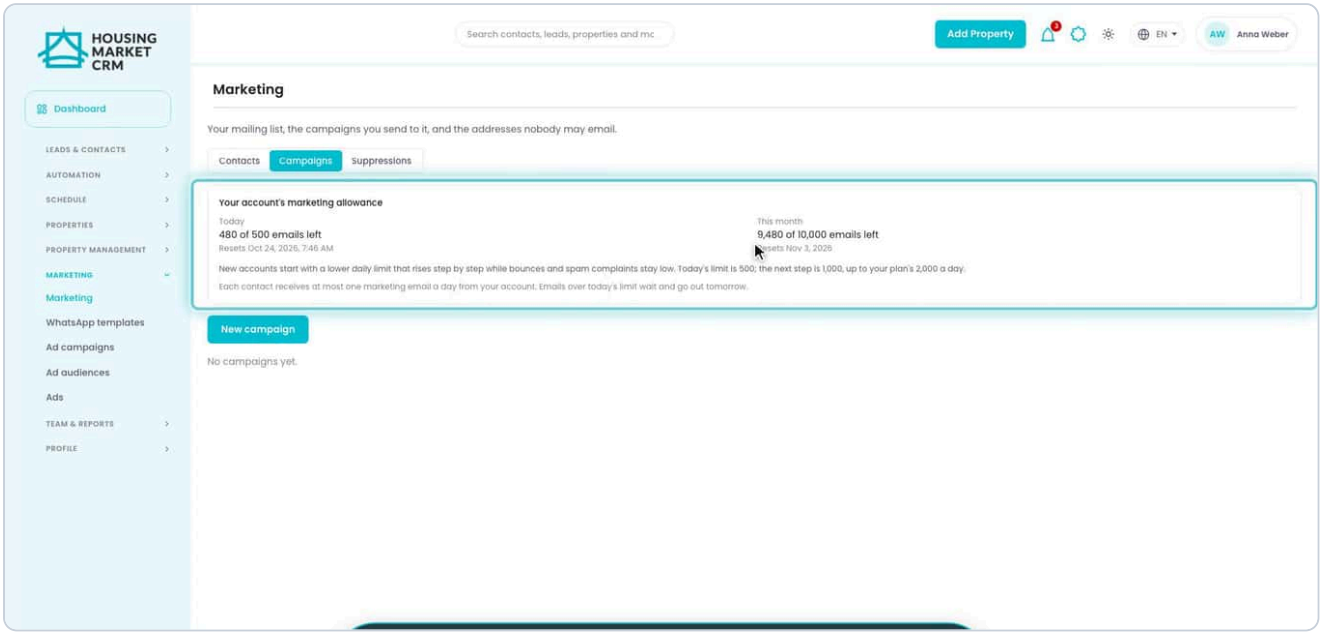


Figure 62.5 · Screen recorded 23 October 2026

6 Click **New campaign**.

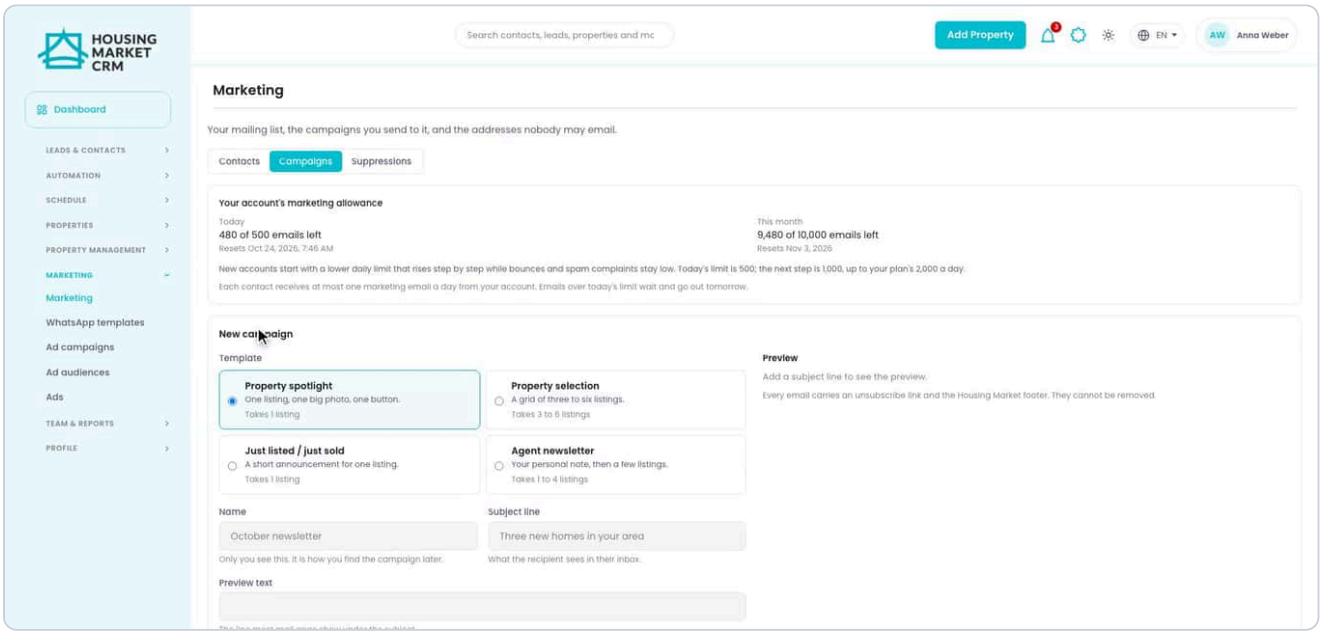


Figure 62.6 · Screen recorded 23 October 2026

7 Start from one of **four templates**.

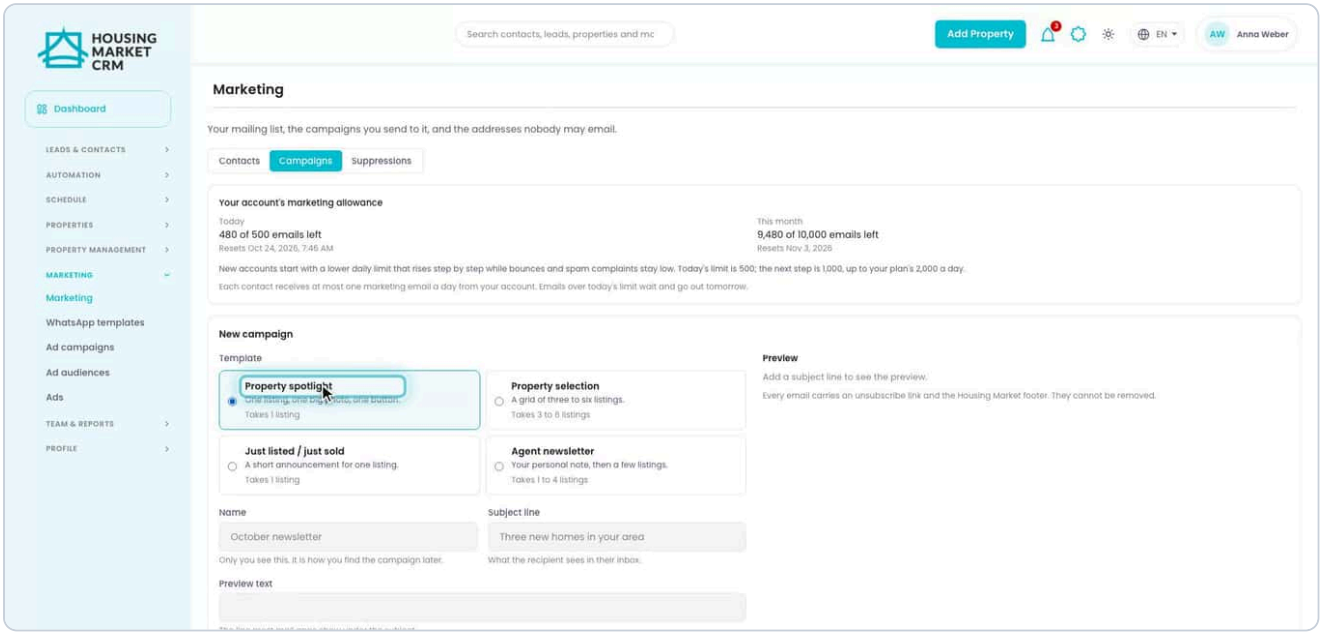


Figure 62.7 · Screen recorded 23 October 2026

8 A **selection** shows three to six listings.

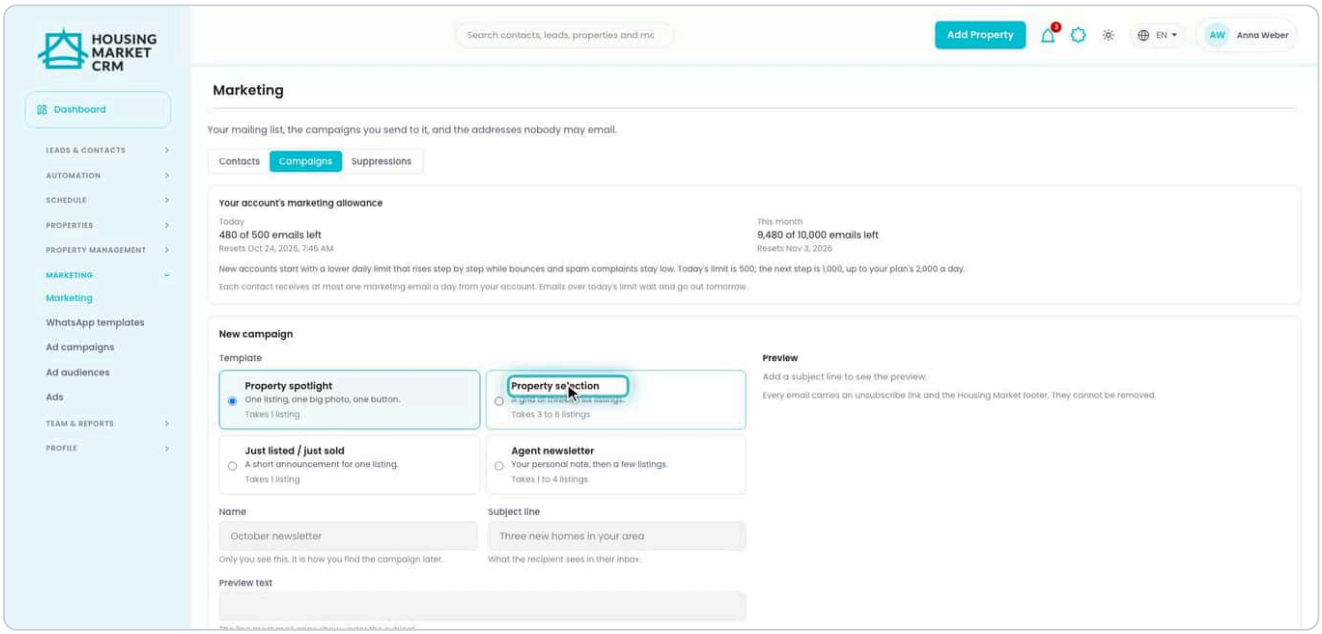


Figure 62.8 · Screen recorded 23 October 2026

9 A **newsletter** starts with your own note.

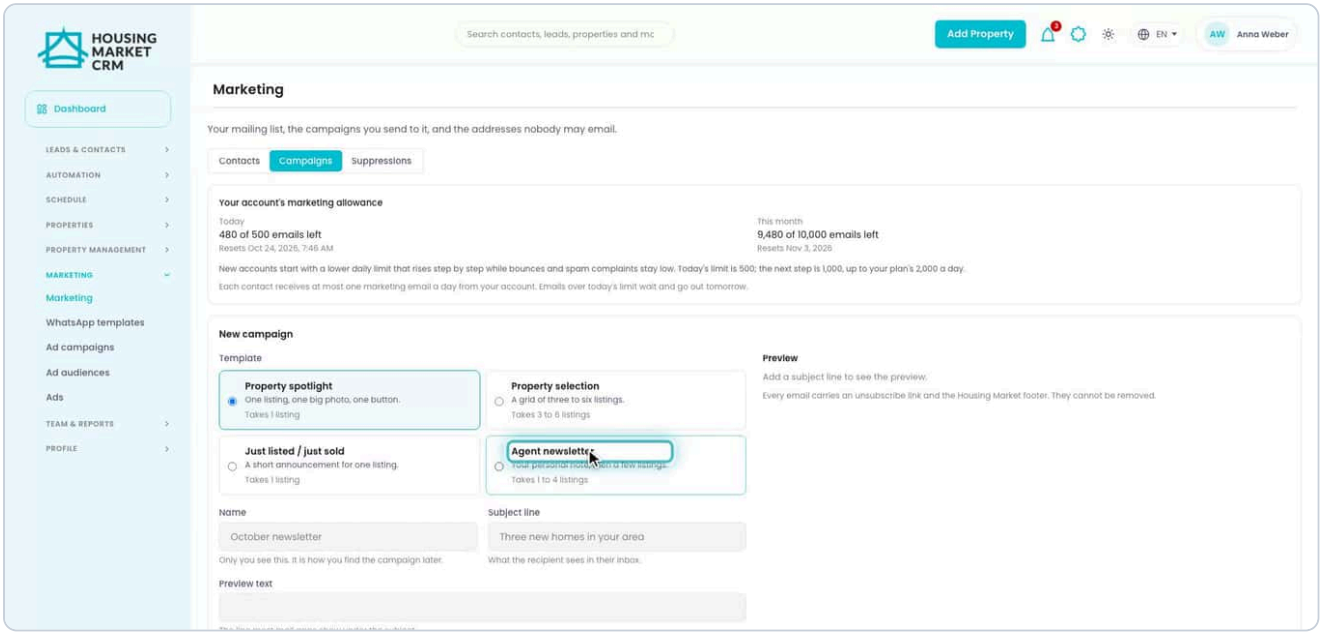


Figure 62.9 · Screen recorded 23 October 2026

10 Choose **Property spotlight**: one listing, one big photo.

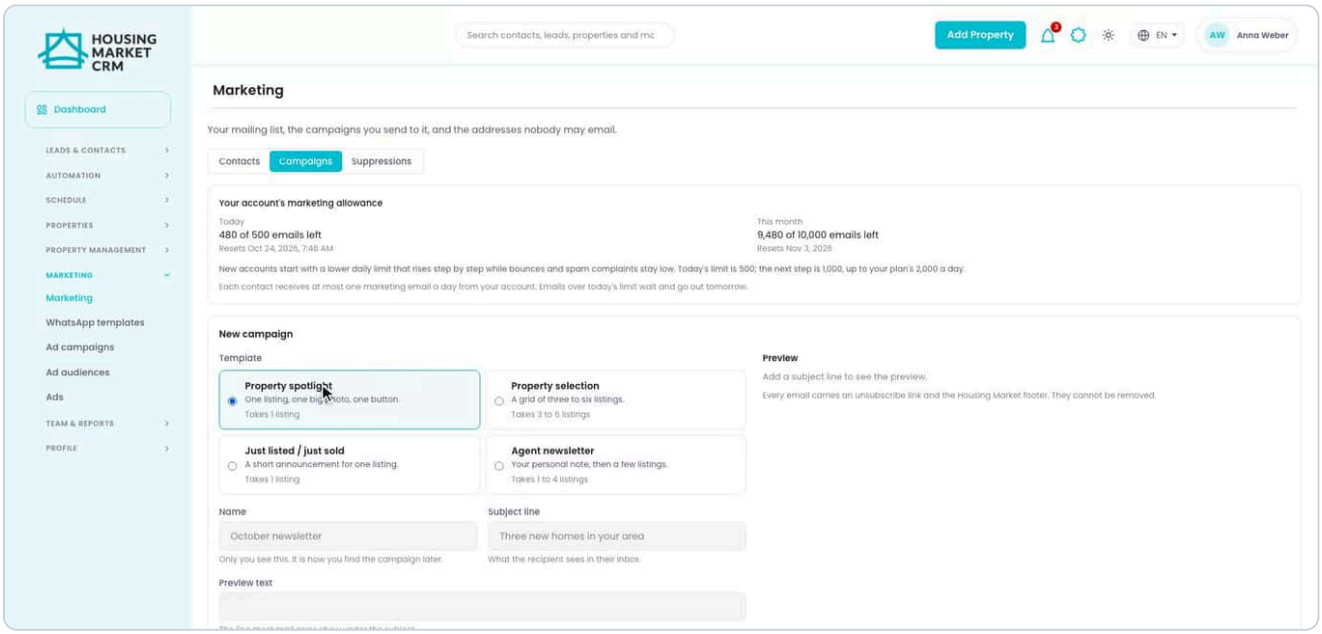


Figure 62.10 · Screen recorded 23 October 2026

11 Give the campaign a **name** only you see.

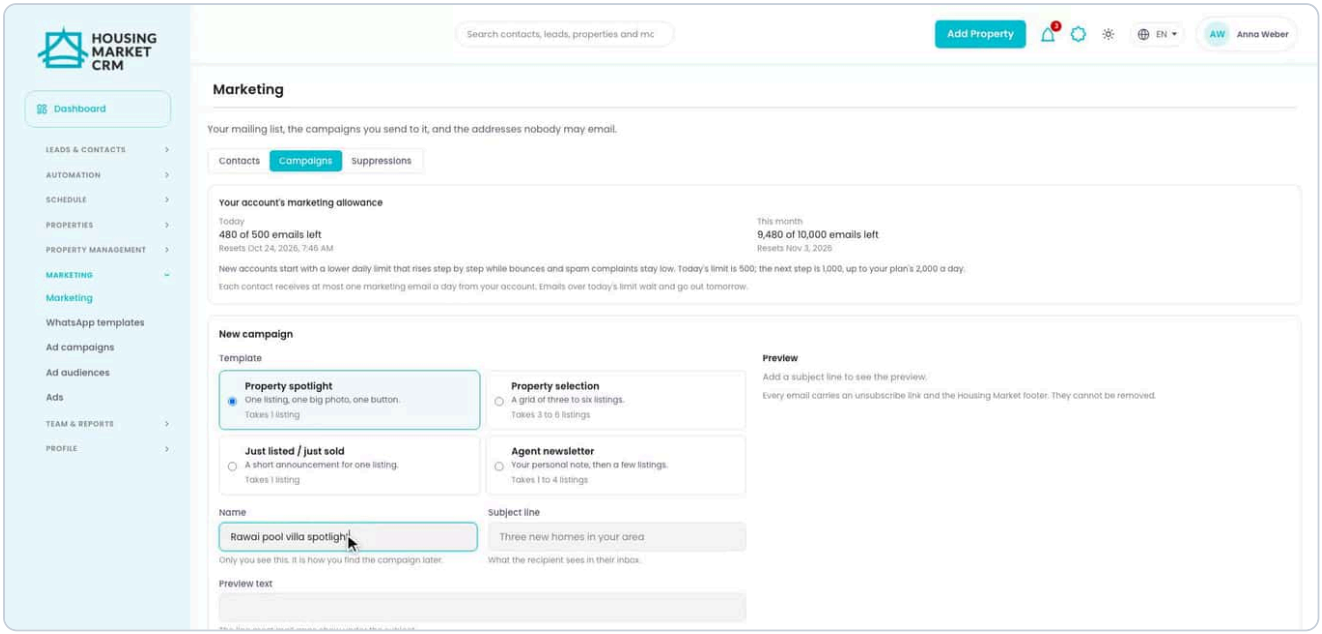


Figure 62.11 · Screen recorded 23 October 2026

12 Write the **subject line** clients will read.

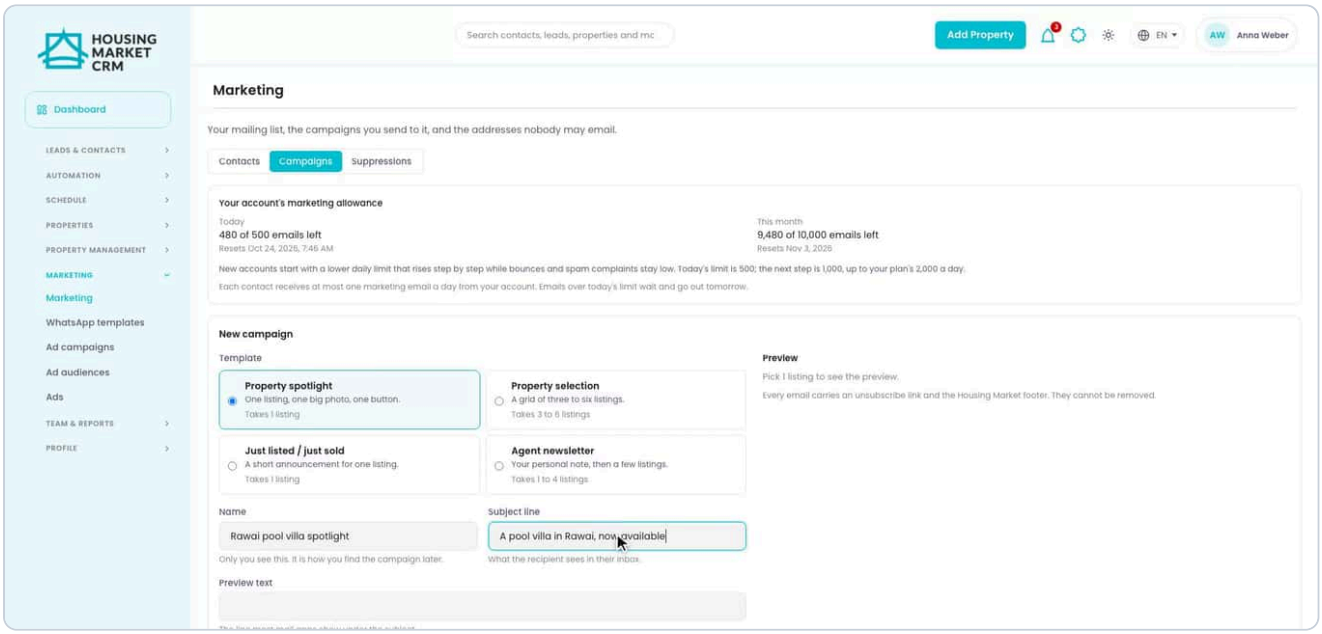


Figure 62.12 · Screen recorded 23 October 2026

13 Tick one of your **live listings**.

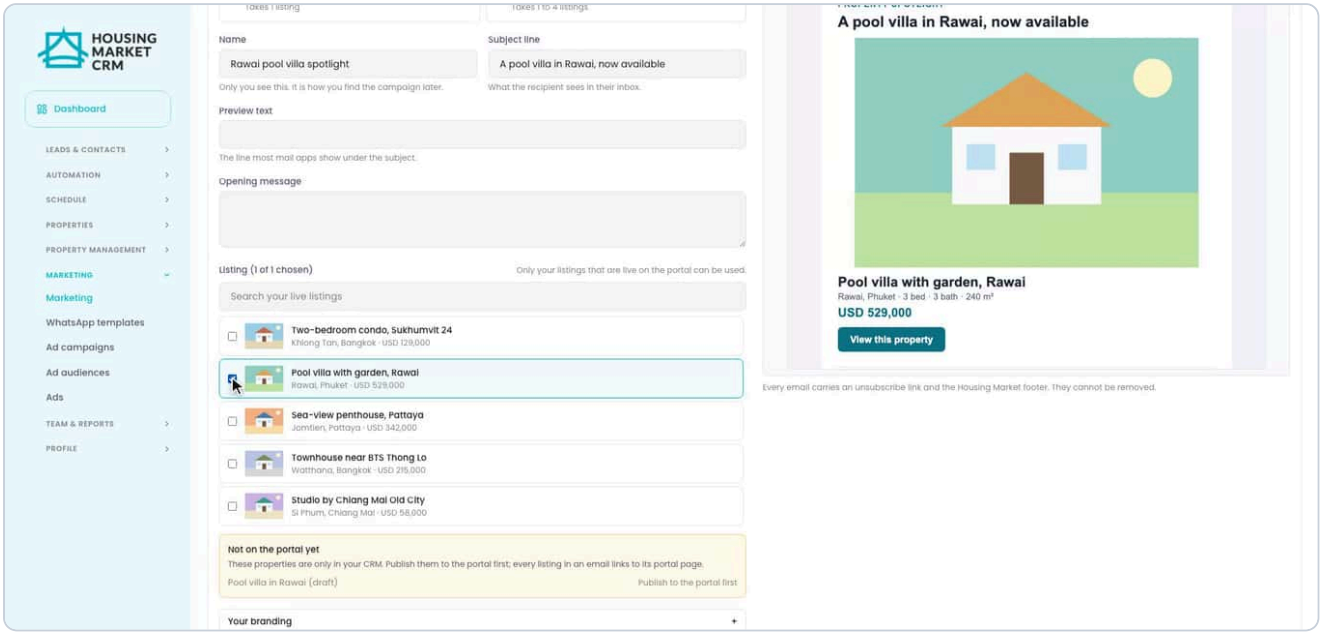


Figure 62.13 · Screen recorded 23 October 2026

14 Only listings that are **live on the portal** can be used.

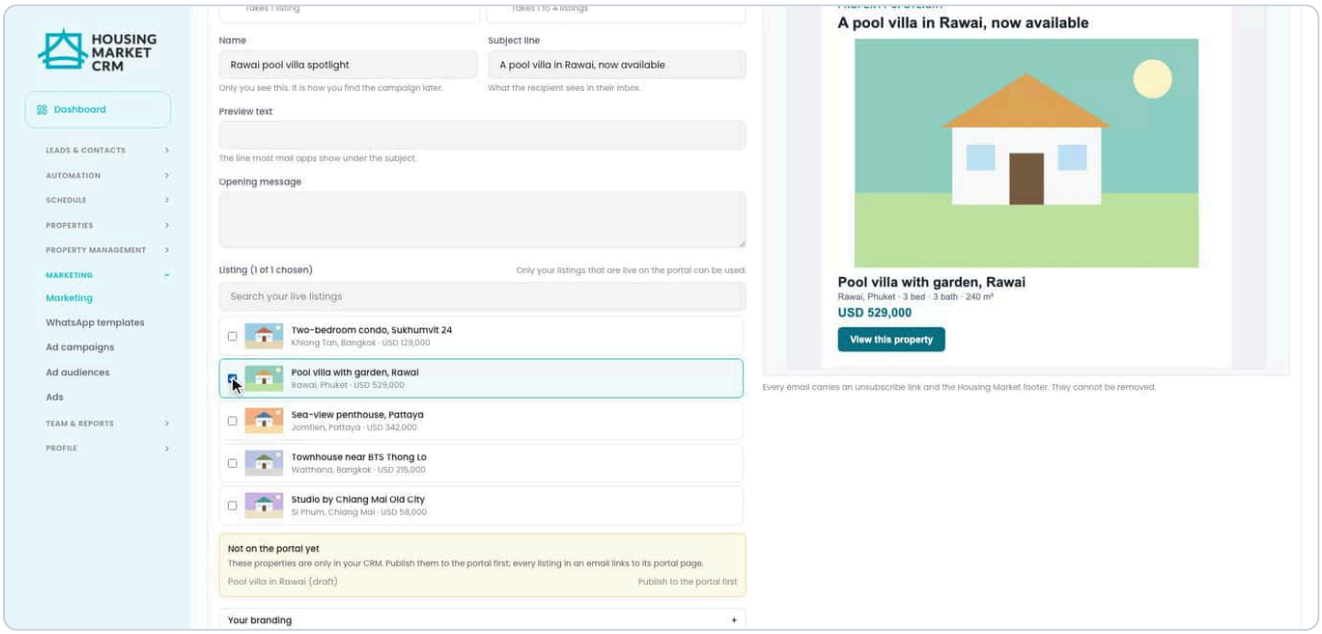


Figure 62.14 · Screen recorded 23 October 2026

15 Open **Your branding**.

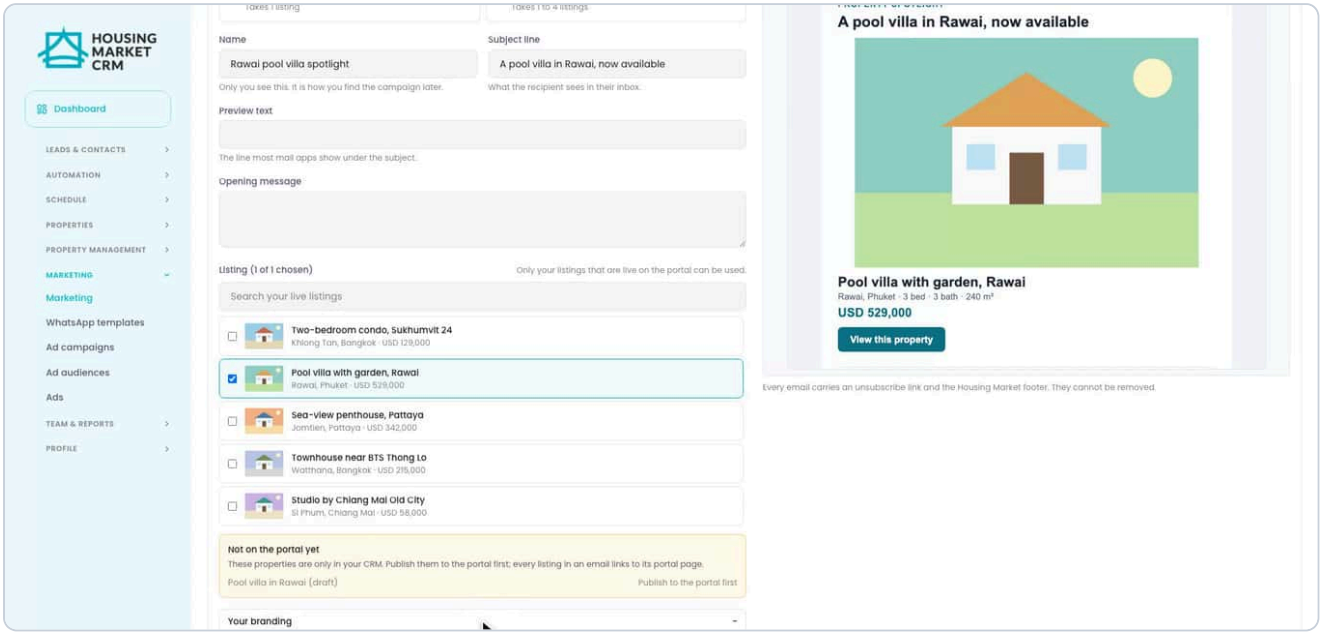


Figure 62.15 · Screen recorded 23 October 2026

16 Set your **brand colour**.

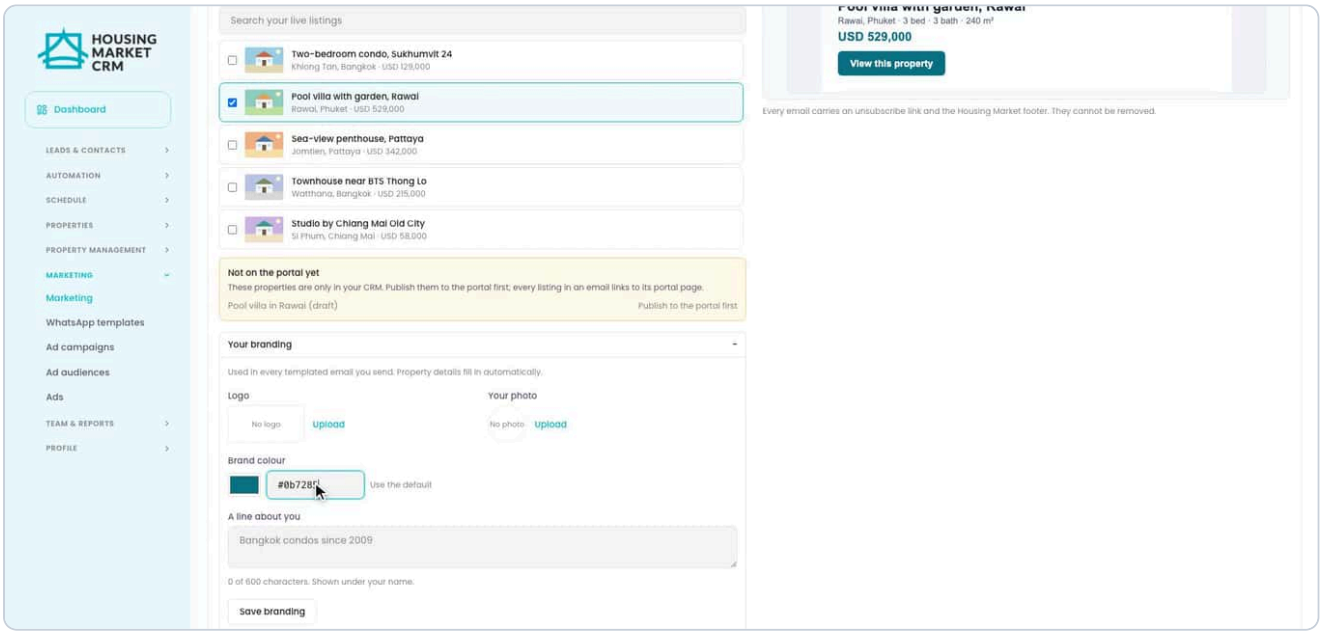


Figure 62.16 · Screen recorded 23 October 2026

17 Add **a line about you**.

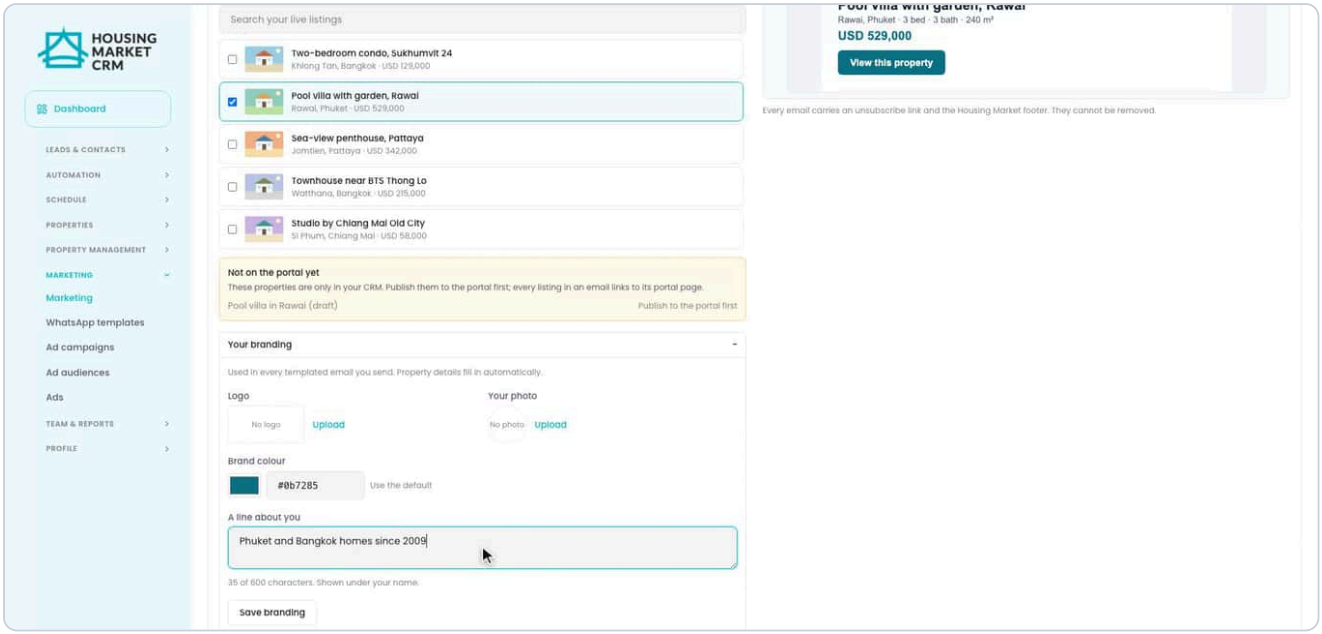


Figure 62.17 · Screen recorded 23 October 2026

18 Click **Save branding**. It is used in every email.

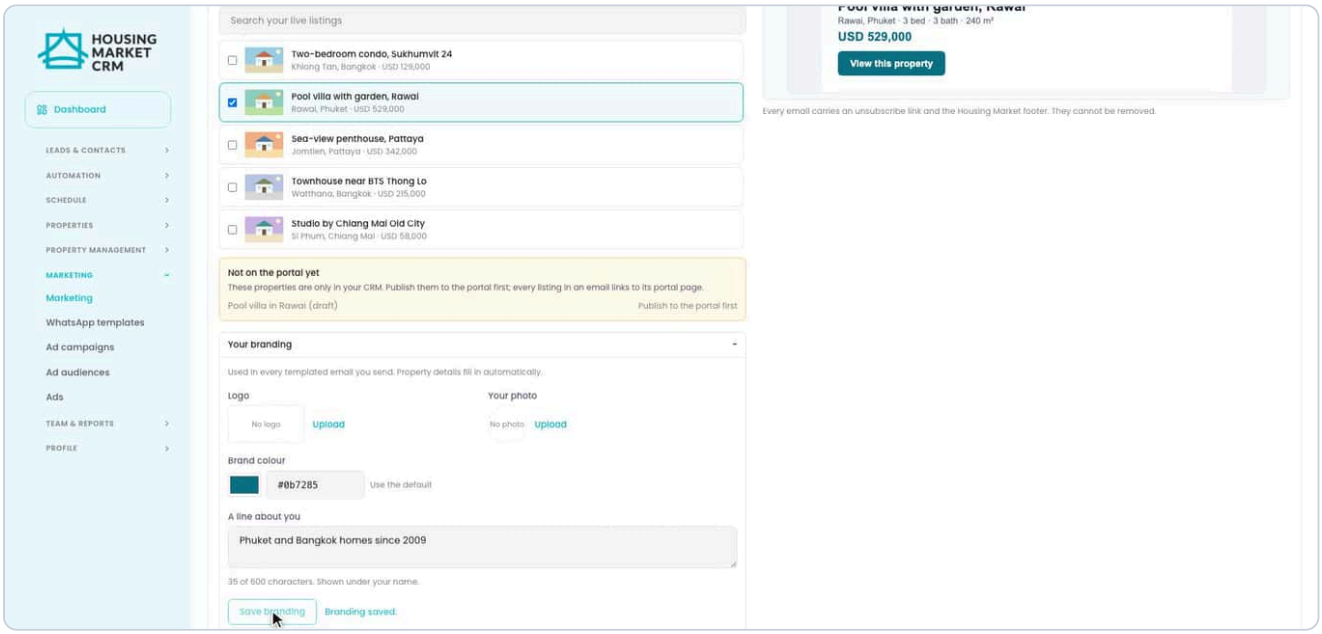


Figure 62.18 · Screen recorded 23 October 2026

19 The **preview** shows the email as clients will see it.

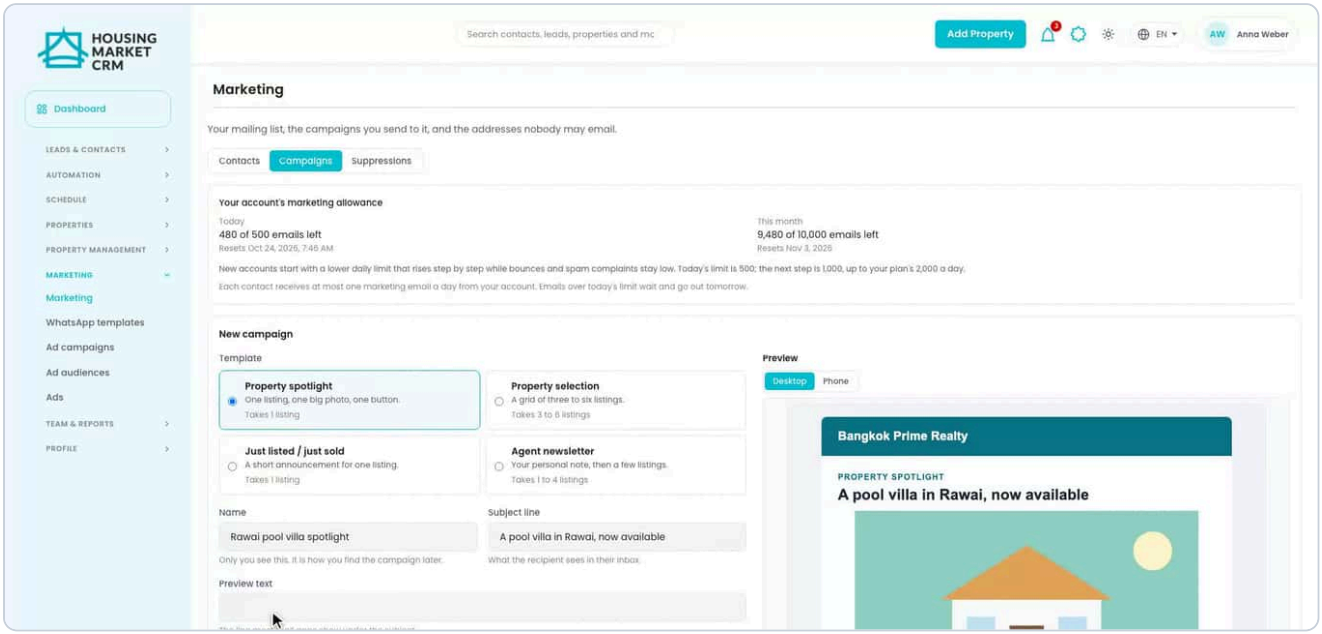


Figure 62.19 · Screen recorded 23 October 2026

20 Switch to **Phone** to check how it looks on a mobile.

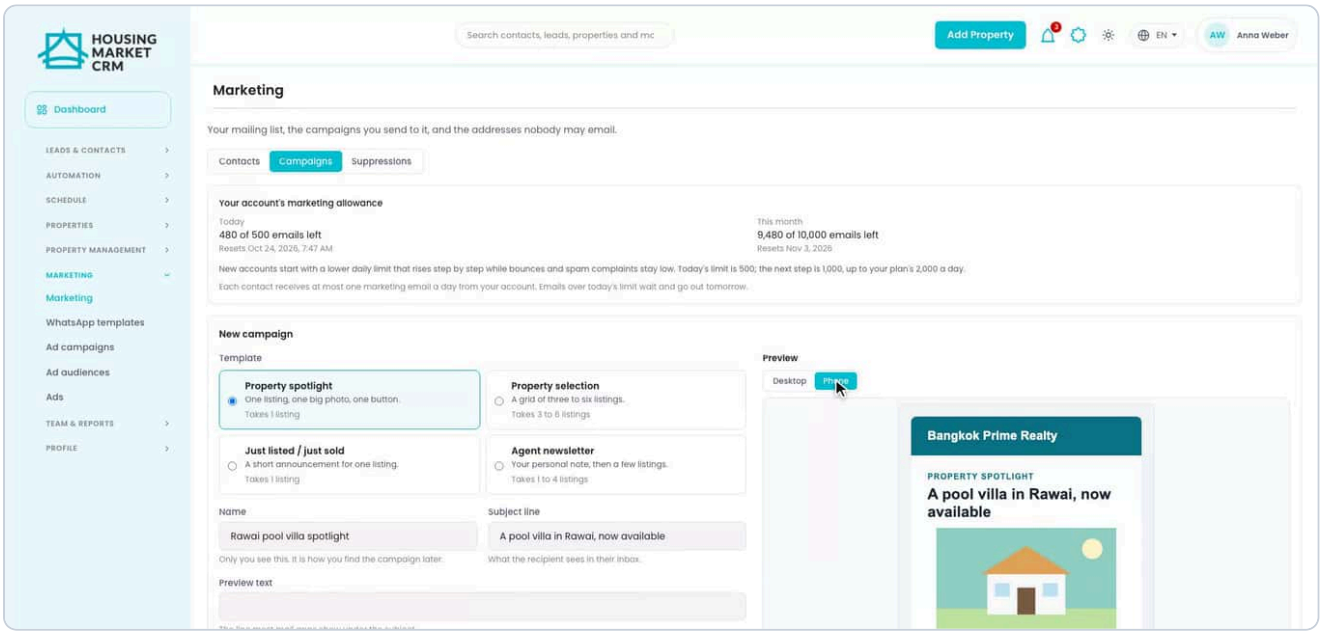


Figure 62.20 · Screen recorded 23 October 2026

21 Every email carries an **unsubscribe link**, and it cannot be removed.

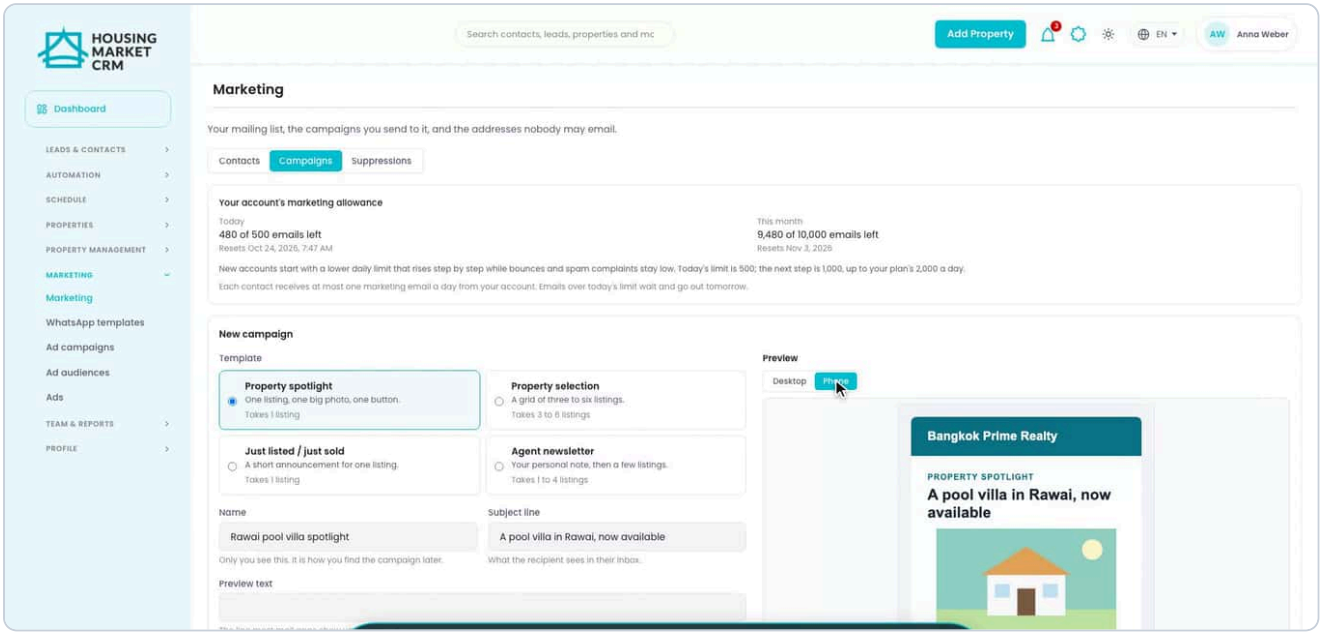


Figure 62.21 · Screen recorded 23 October 2026

22 Click **Save the campaign**.

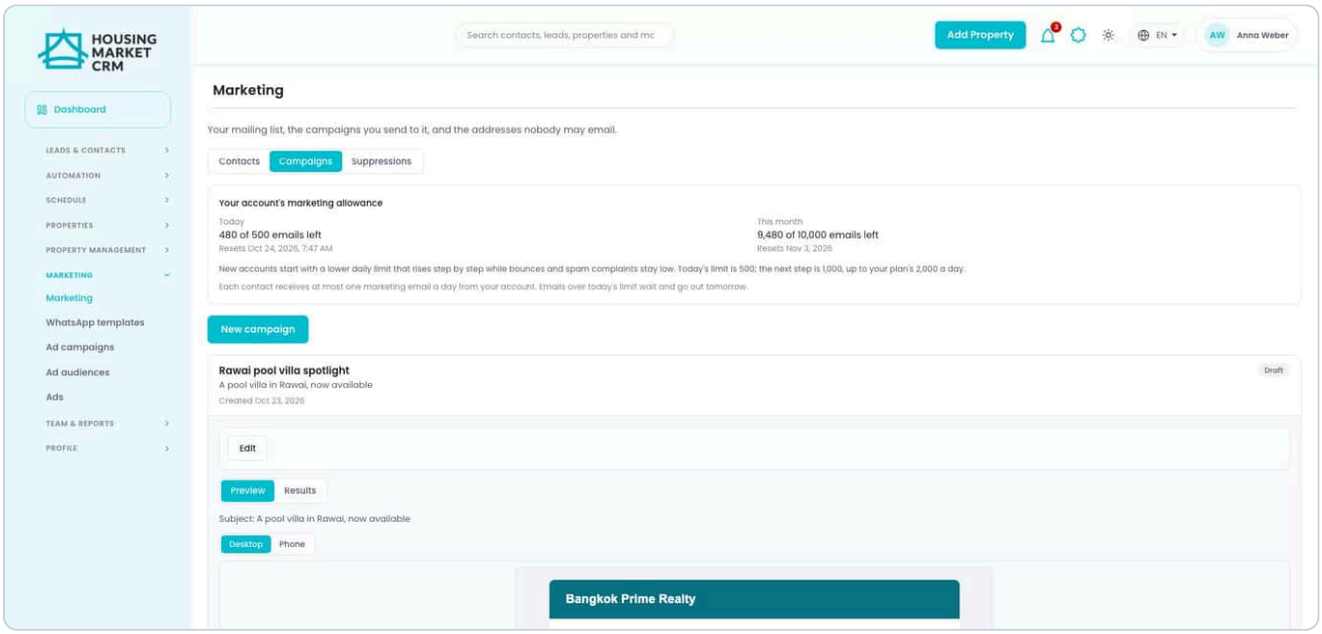


Figure 62.22 · Screen recorded 23 October 2026

23 The saved campaign opens with its **preview**.

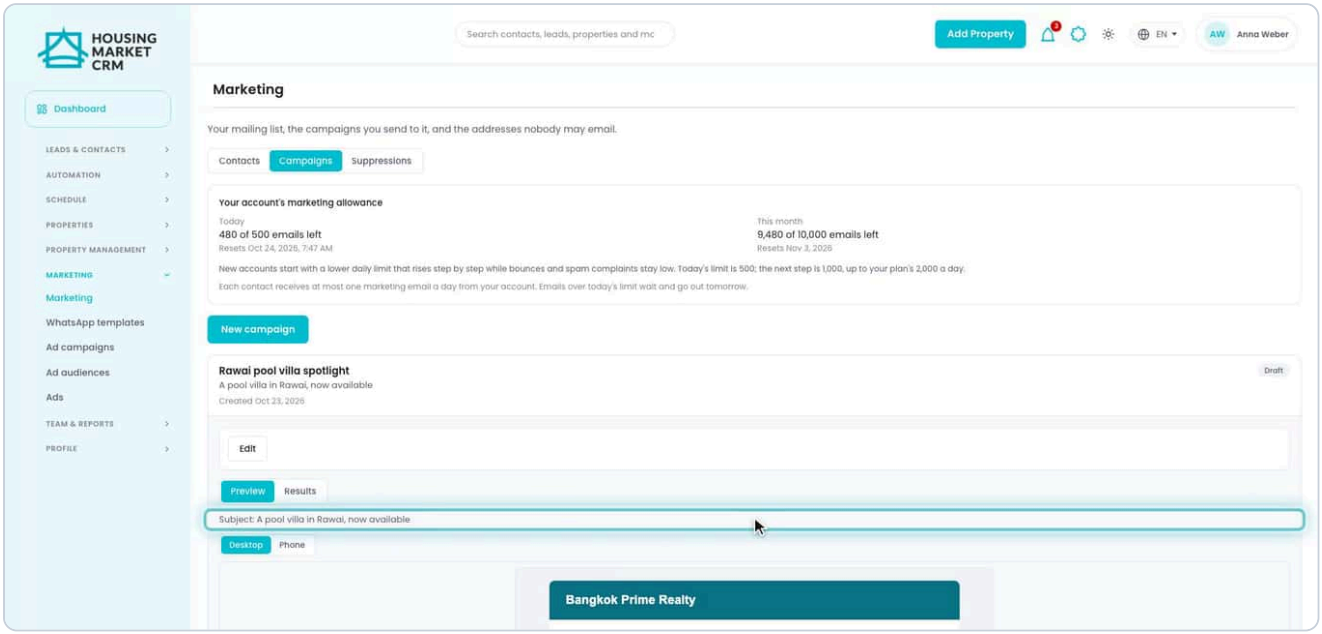


Figure 62.23 · Screen recorded 23 October 2026

24 Click **Send myself a test** to check it in your own inbox.

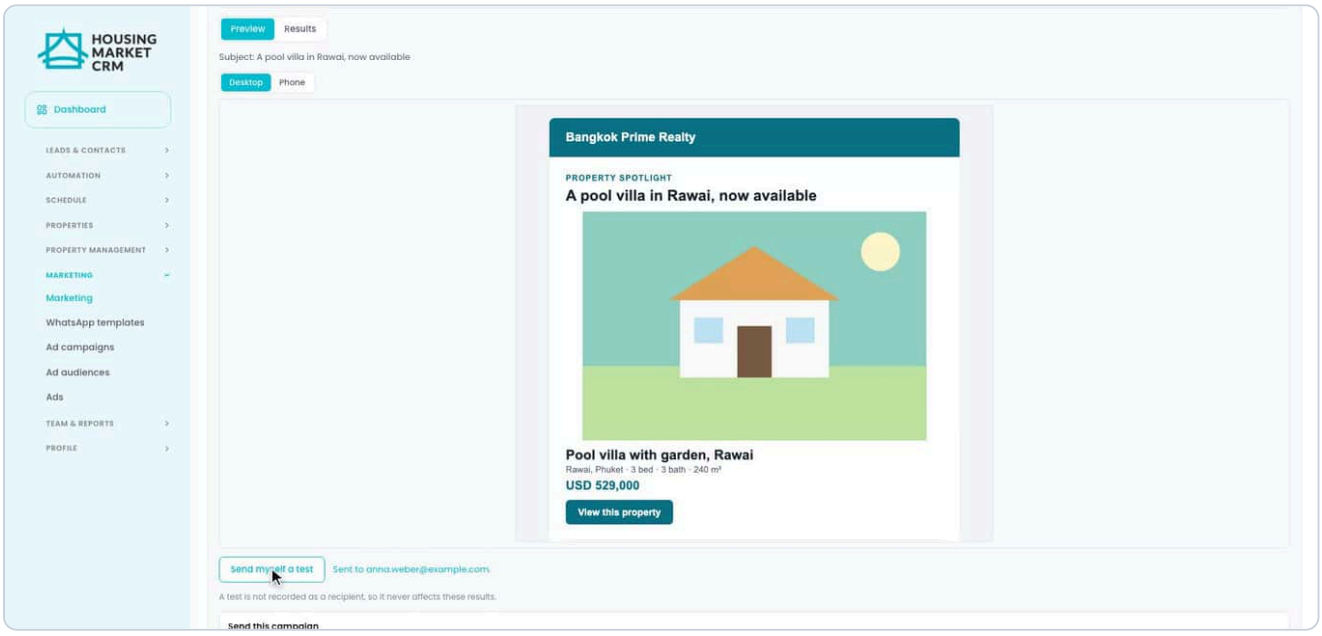


Figure 62.24 · Screen recorded 23 October 2026

25 A test is **never counted** as a recipient.

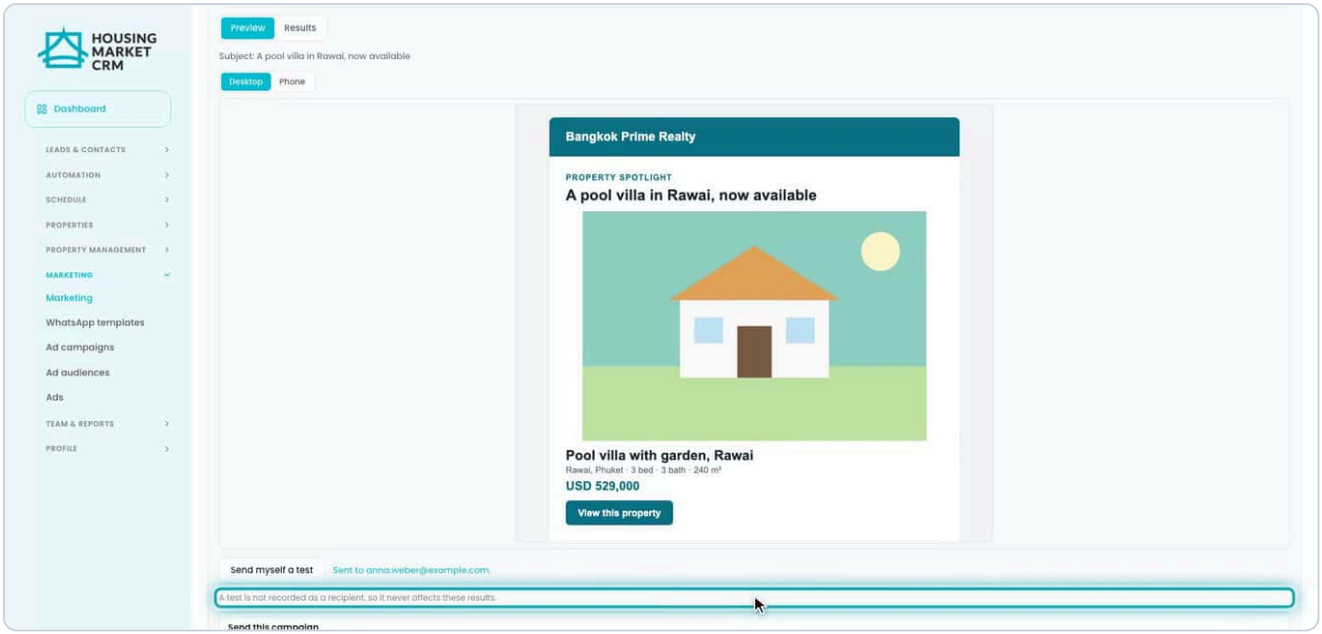


Figure 62.25 · Screen recorded 23 October 2026

26 Leave the time blank and click **Send now**.

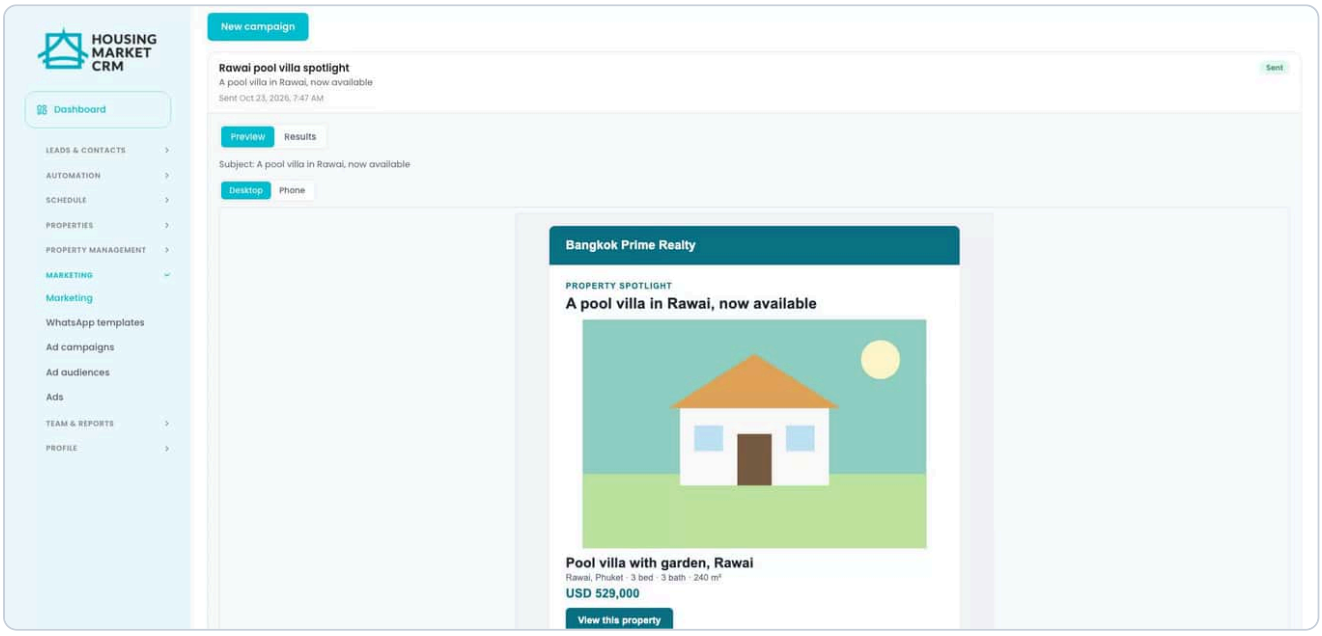


Figure 62.26 · Screen recorded 23 October 2026

27 The campaign is marked **Sent**.

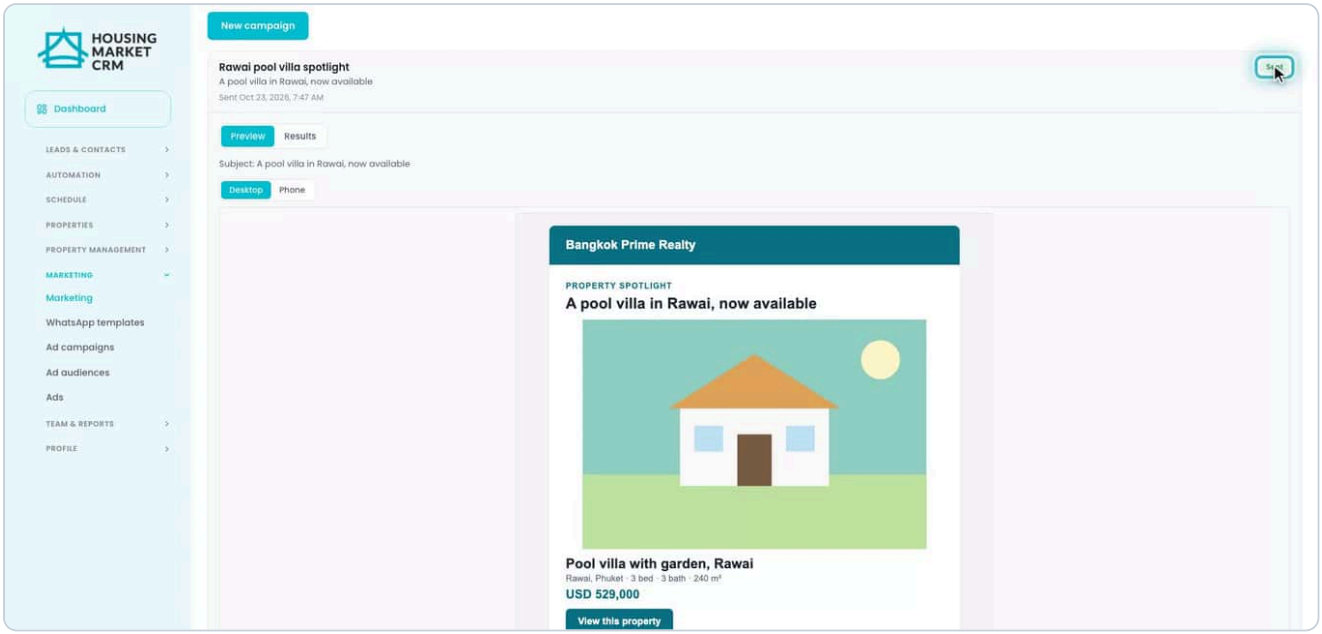


Figure 62.27 · Screen recorded 23 October 2026

28 Open **Results** to follow how it does.

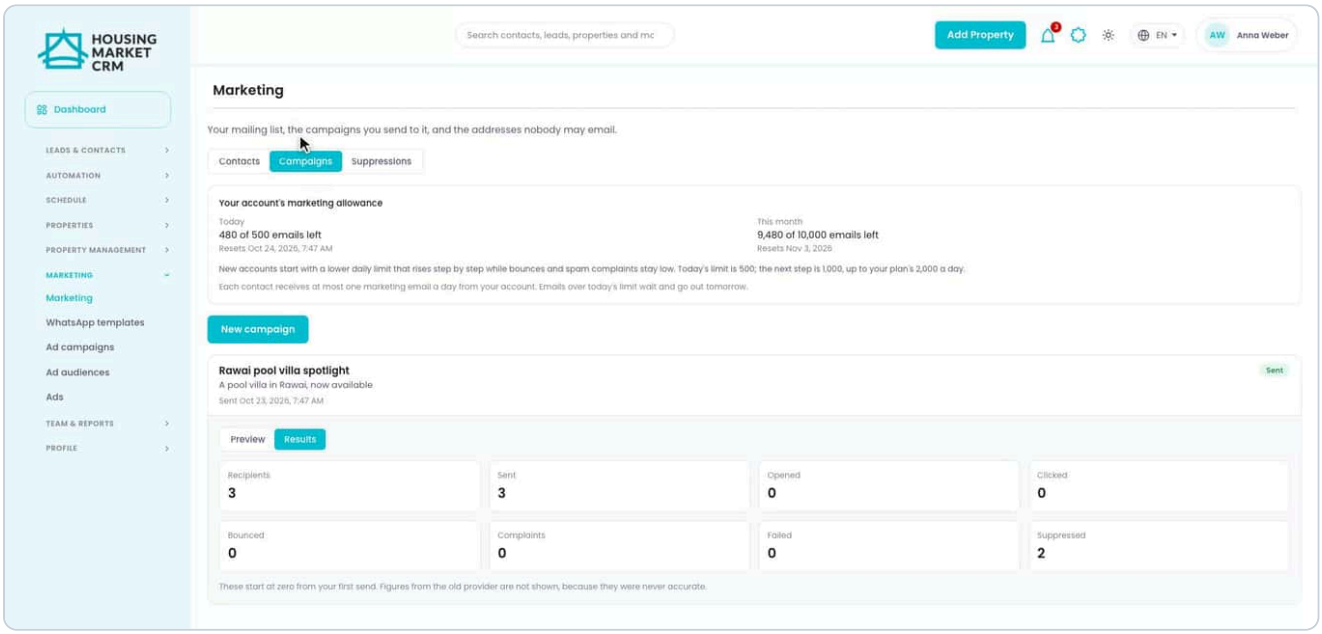


Figure 62.28 · Screen recorded 23 October 2026

29 Anyone who **unsubscribed** or has no consent was left out.

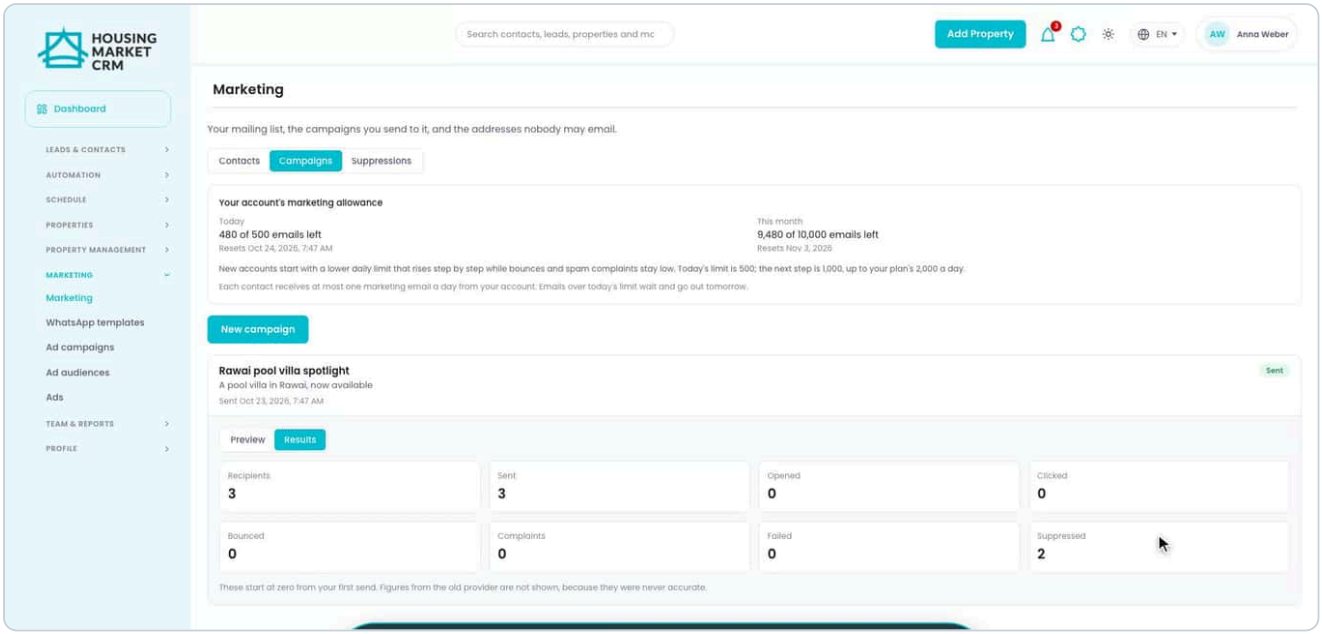


Figure 62.29 · Screen recorded 23 October 2026

RELATED HELP CENTER ARTICLES

How does nurture work? faq.housingmarketgroup.com/faq/how-does-nurture-work

63 CHAPTER 63

Promote a listing to portal shoppers

Pro and Business | For agents | Watch the video

OVERVIEW

On a live portal listing choose Promote to shoppers. The listing is emailed to property shoppers on the portal who are looking for a home like it. You see how many match, never who they are.

Promote to shoppers is on your live portal listings for sale or for rent, and in the list called Shopper promotions. It is part of the Pro and Business plans. A property that is only in your CRM must be published to the portal first.

Choose the area (the whole province or this city only), a price range around the asking price and the bedrooms. The screen shows how many matching shoppers there are. A promotion needs at least the number the screen states, so widen the area or the price range if there are too few. Only shoppers who agreed to receive property offers are included.

Choose a template: Spotlight, Just listed or Personal note. Add a subject, which is the listing's name if you leave it empty, and a short message if you like, then preview the email. It is sent from the portal's own address and features your name, photo, logo and the listing. Then choose when it goes out: as soon as it is approved, or at a time you choose.

The screen shows the price before you pay. You pay for the matching shoppers shown, and after sending you are charged only for the emails that were delivered and the difference is refunded. The Housing Market team checks every promotion before it is sent, usually within one working day, and if it is not approved you are refunded in full.

Results show the matching shoppers, how many were sent, delivered, opened and clicked, the enquiries and the unsubscribes. Shoppers can unsubscribe from property offers at any time.

From the Help Center: **How do I promote a listing to shoppers?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

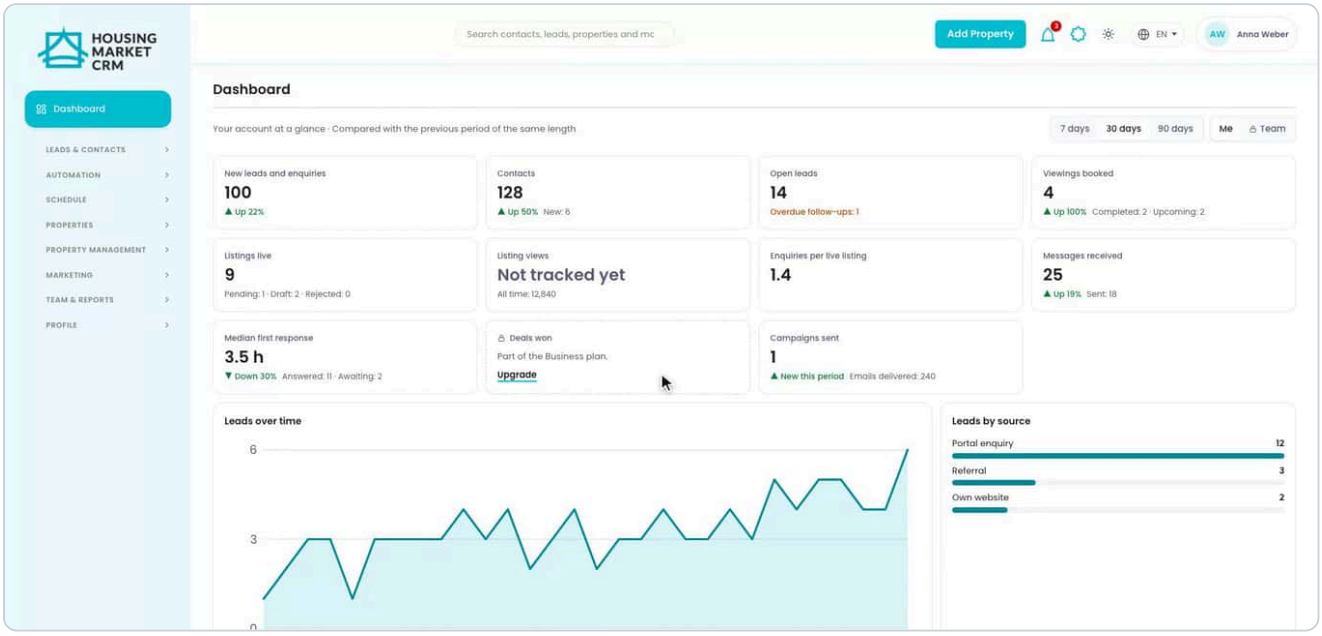


Figure 63.1 · Screen recorded 23 October 2026

2 Open **Properties** in the left menu.

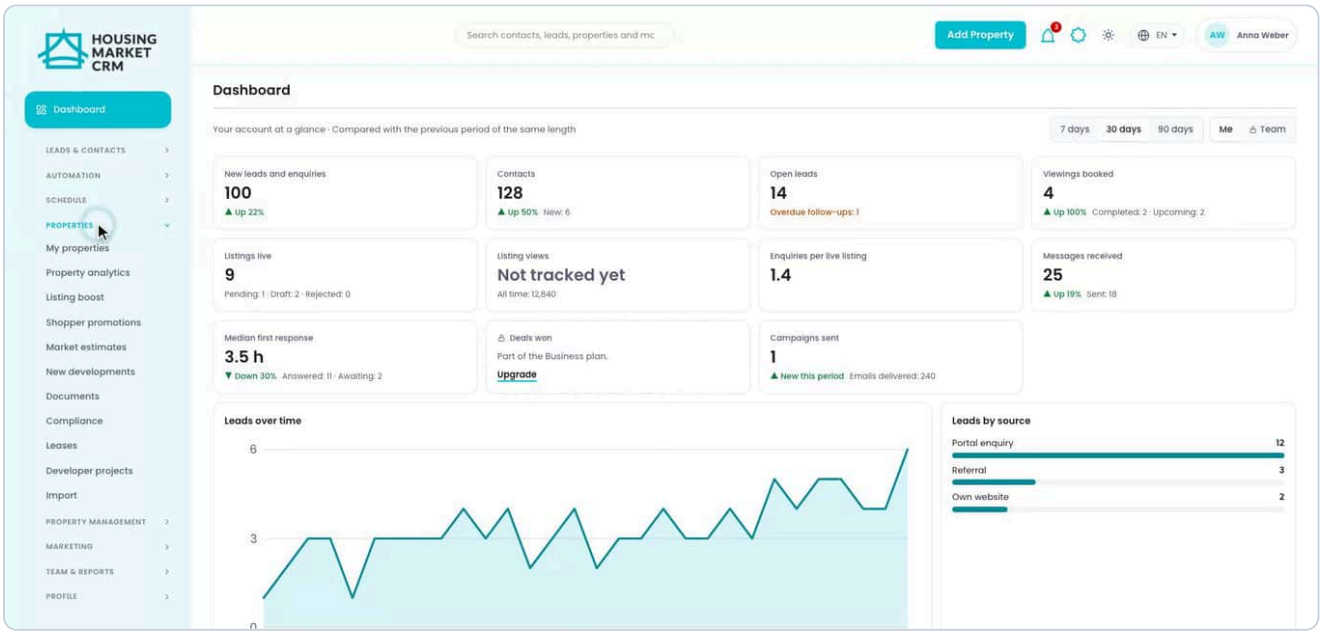


Figure 63.2 · Screen recorded 23 October 2026

3 Click **My properties**.

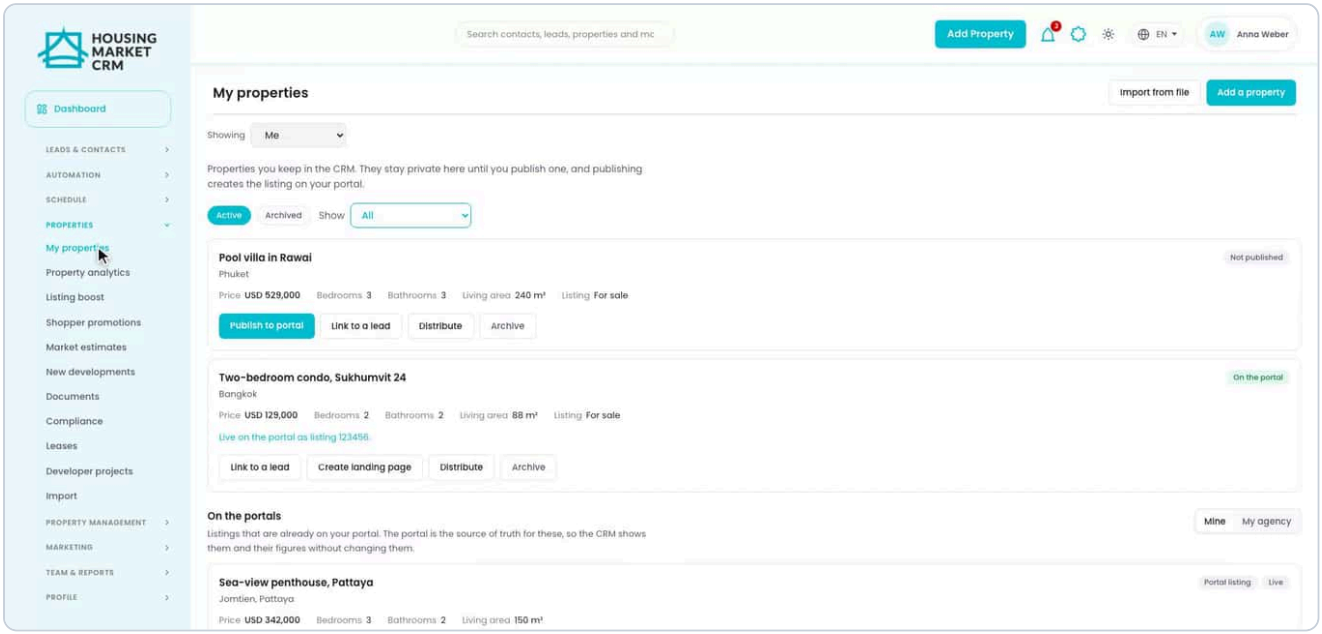


Figure 63.3 · Screen recorded 23 October 2026

4 Your listings that are on the portal appear on this page too.

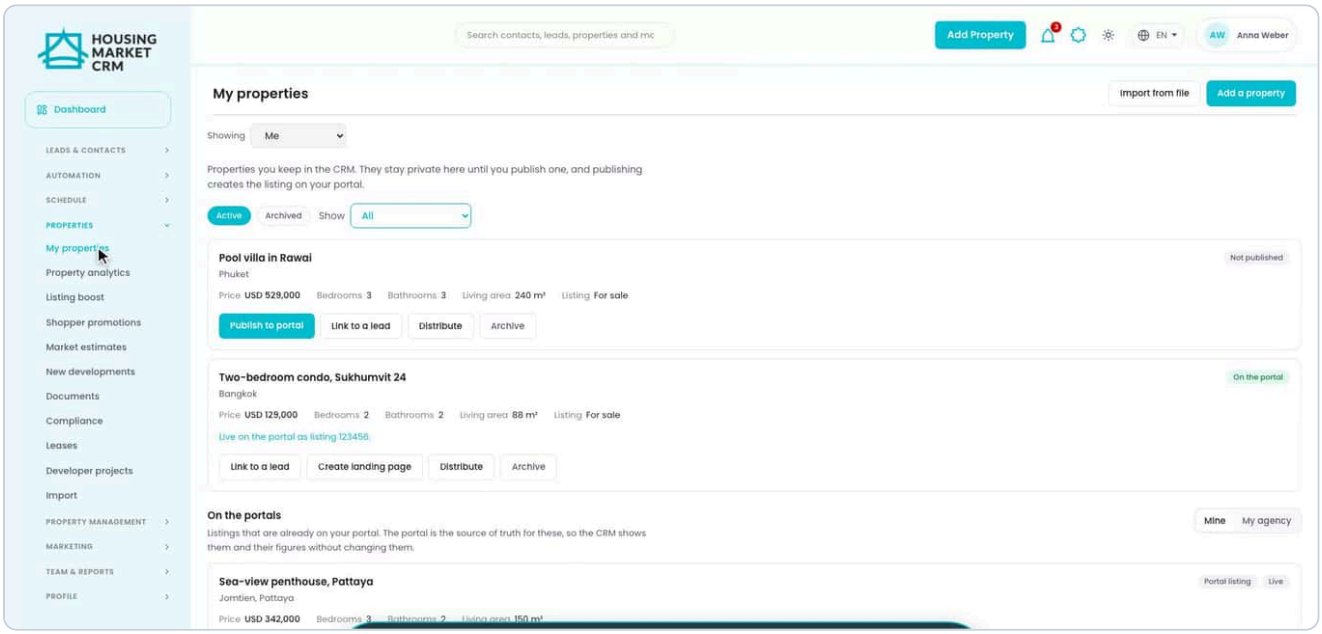


Figure 63.4 · Screen recorded 23 October 2026

5 A listing that is **live on the portal** has **Promote to shoppers**.

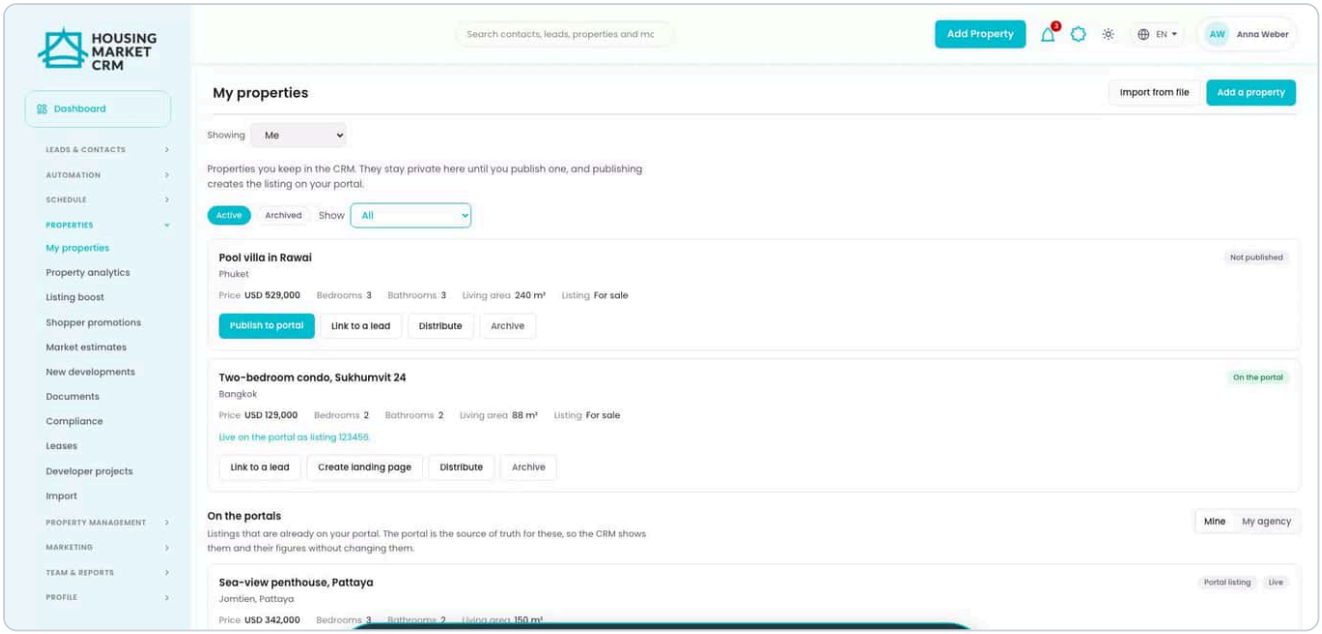


Figure 63.5 · Screen recorded 23 October 2026

6 Click **Promote to shoppers**.

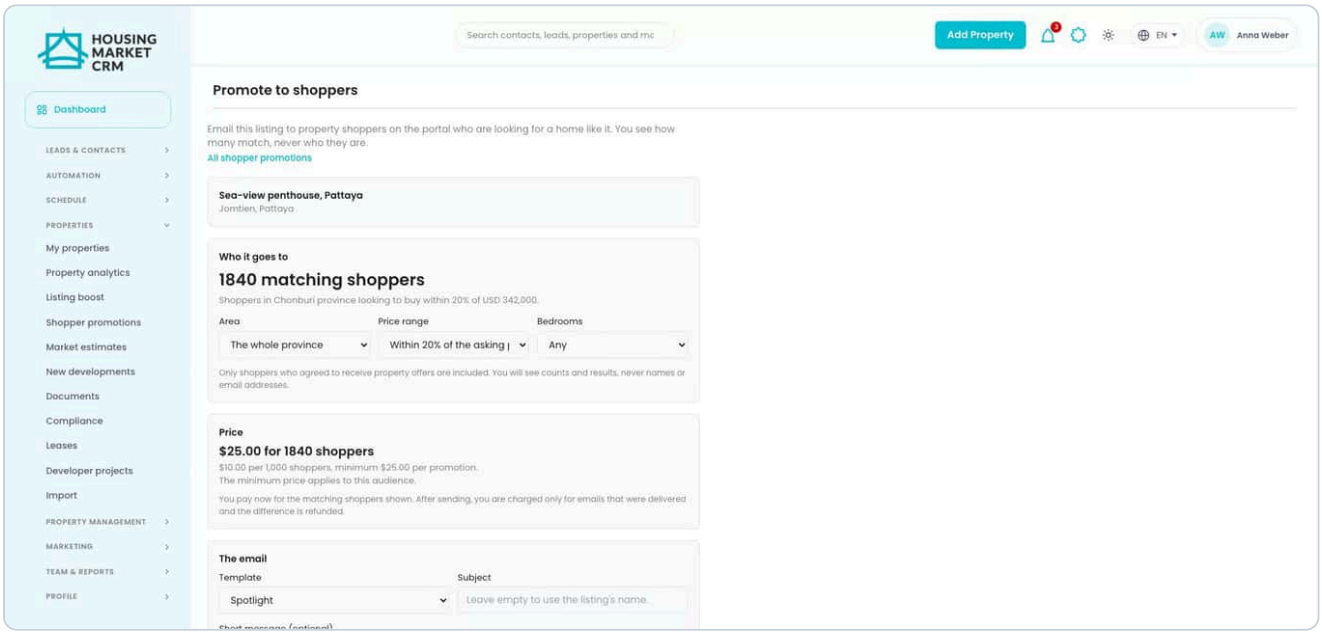


Figure 63.6 · Screen recorded 23 October 2026

7 This is how many **matching shoppers** there are.

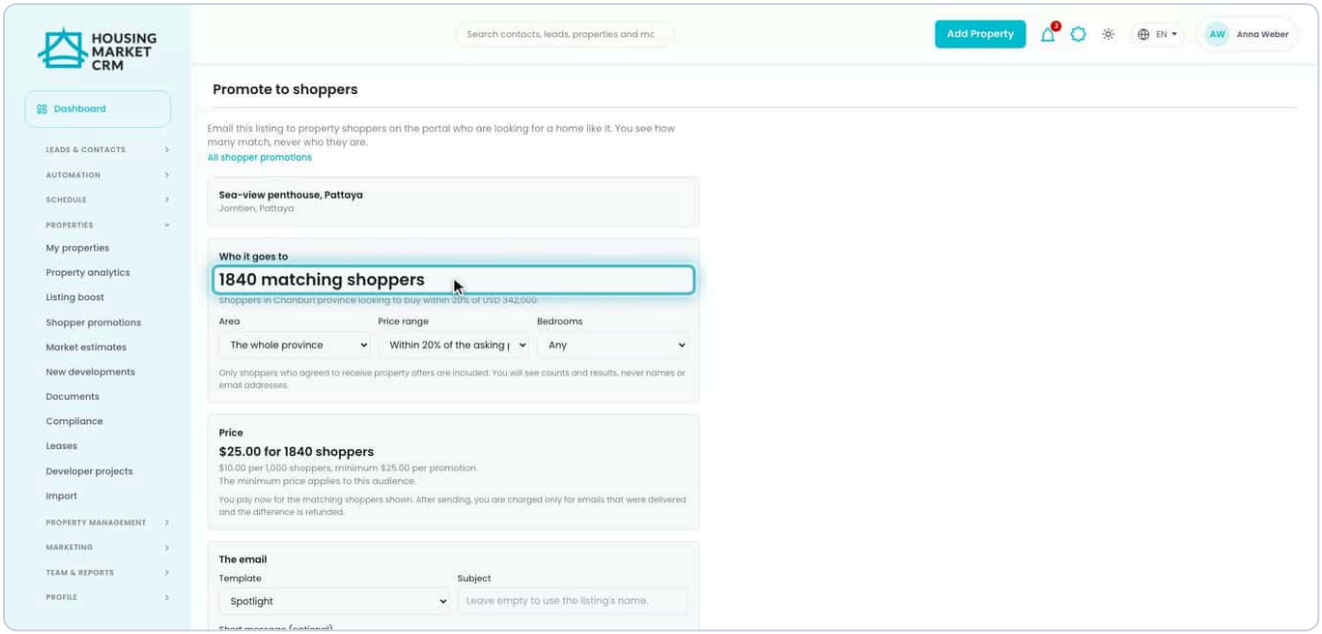


Figure 63.7 · Screen recorded 23 October 2026

8 You see the number, never who they are.

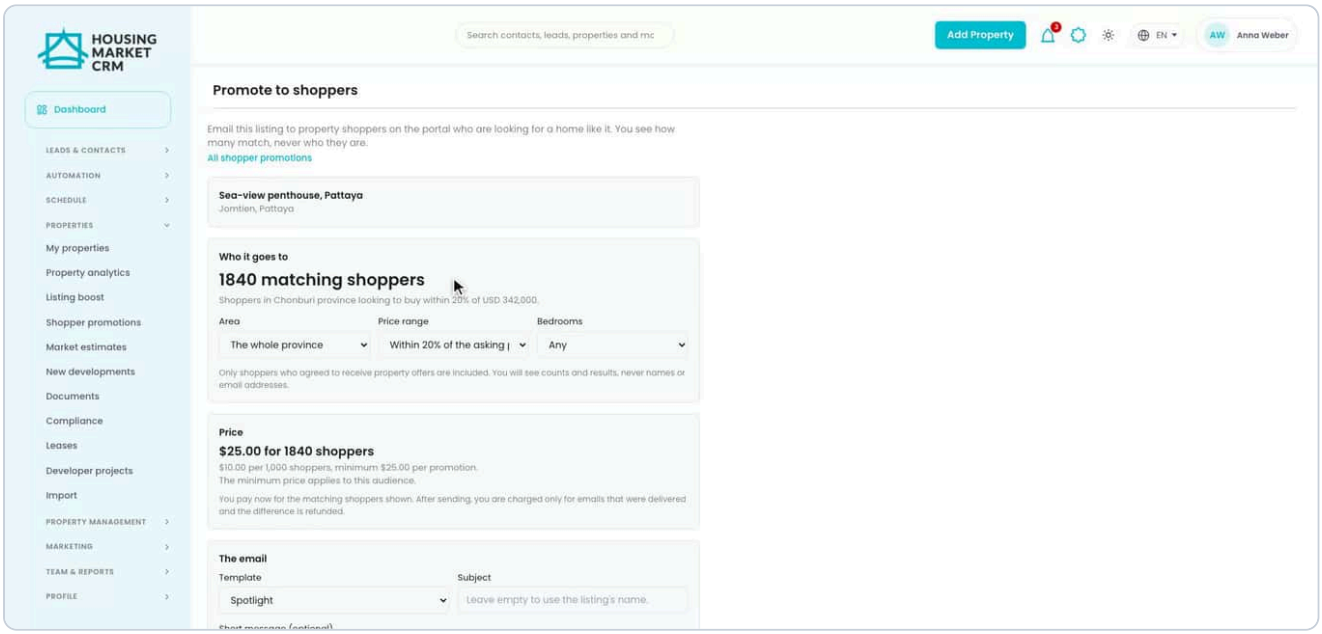


Figure 63.8 · Screen recorded 23 October 2026

9 Narrow it to **this city only** widen the **price range**.

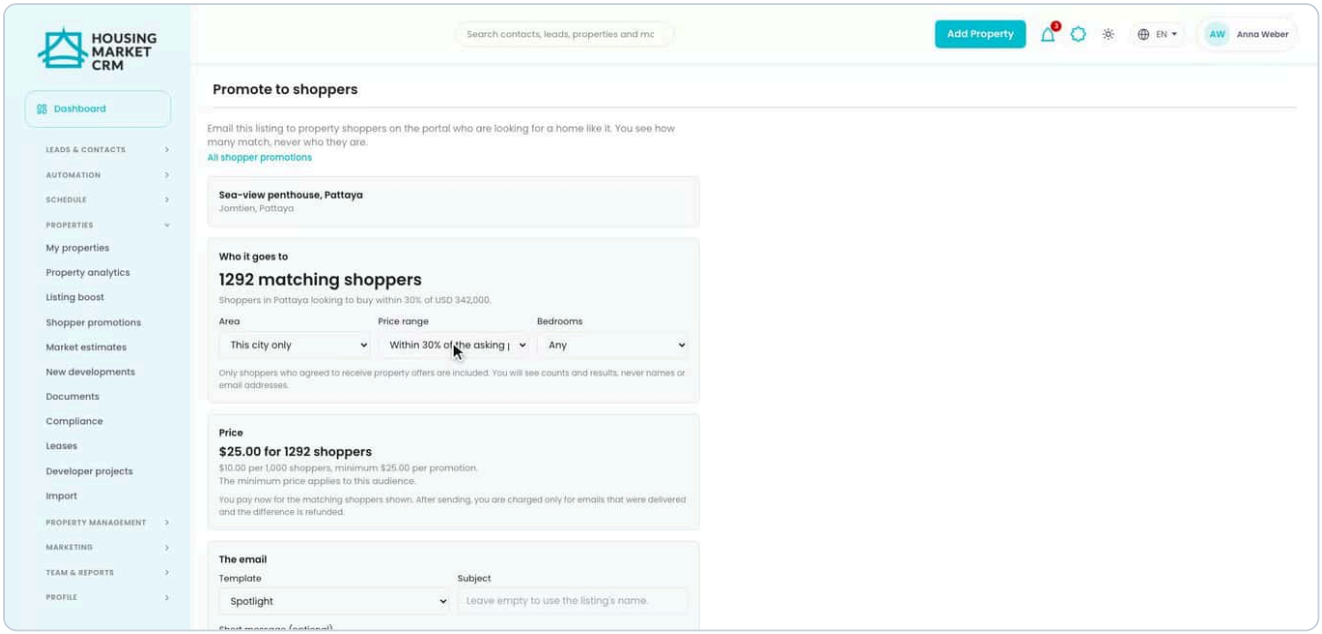


Figure 63.9 · Screen recorded 23 October 2026

10 and ask for **two bedrooms or more**.

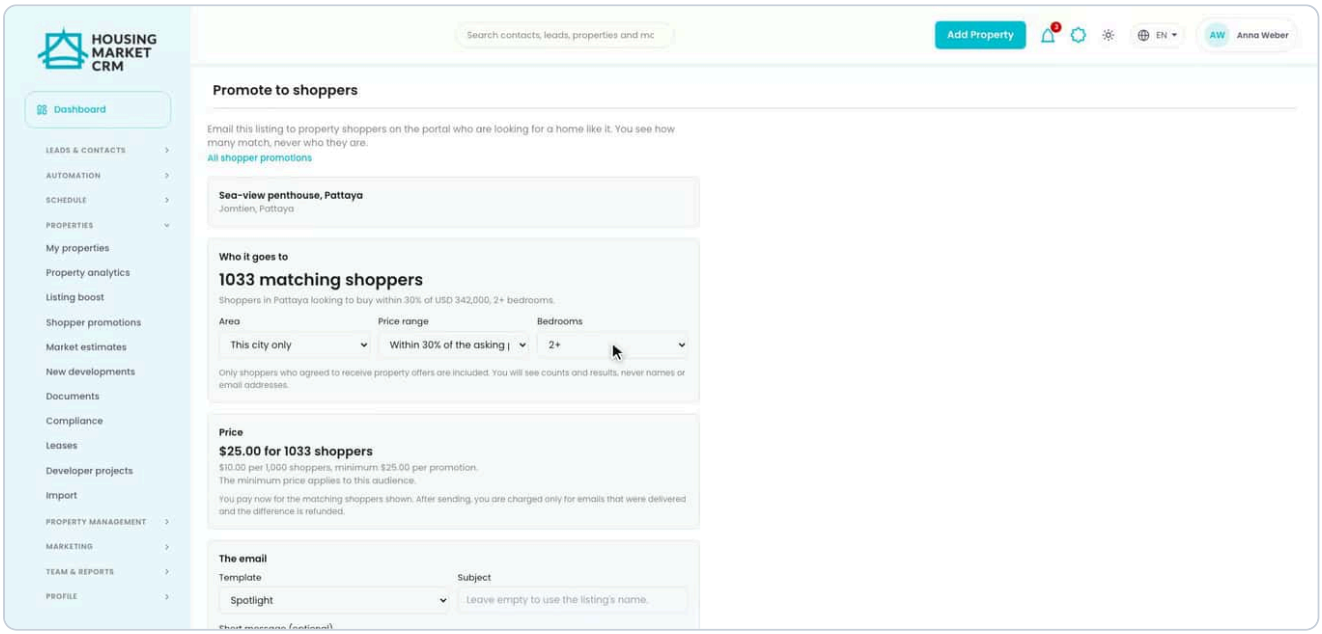


Figure 63.10 · Screen recorded 23 October 2026

11 The count updates as you narrow it.

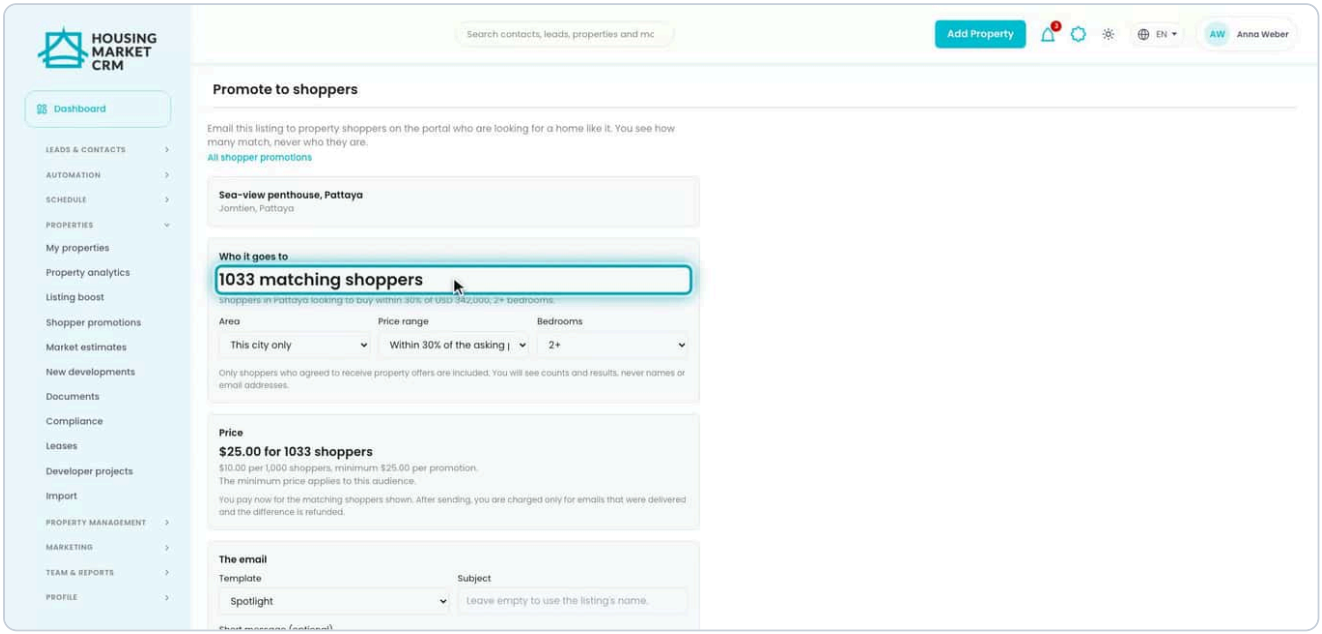


Figure 63.11 · Screen recorded 23 October 2026

12 The price is worked out from the number of shoppers.

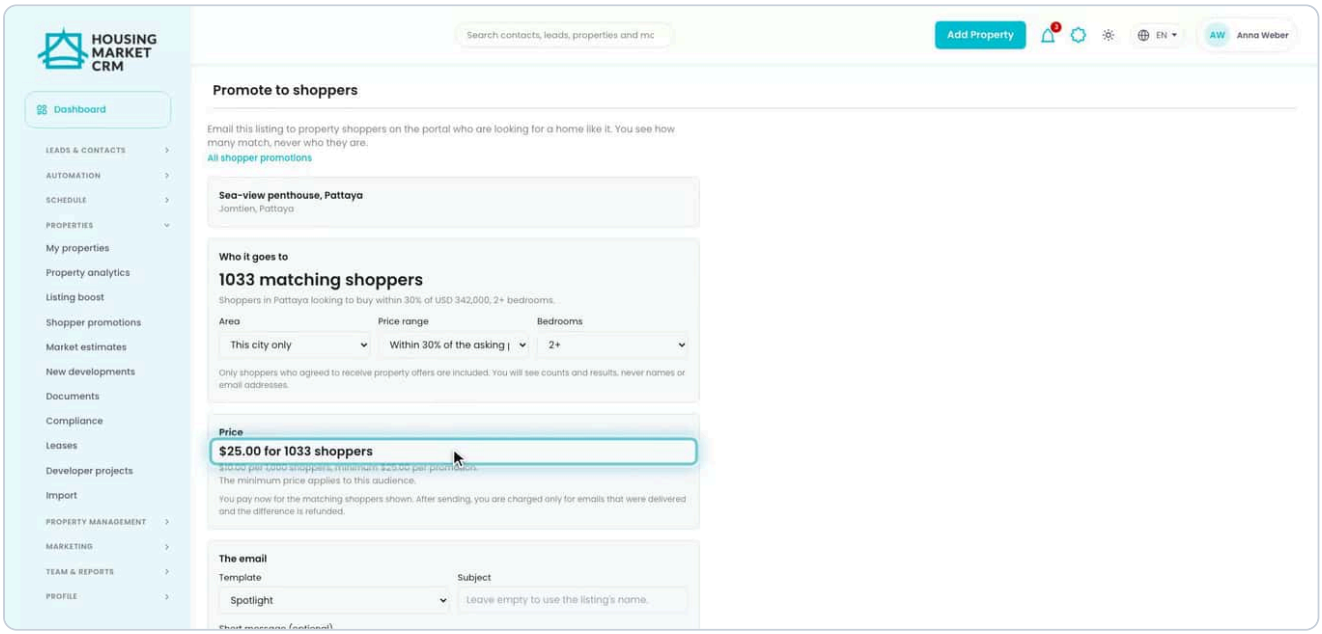


Figure 63.12 · Screen recorded 23 October 2026

13 After sending, you are charged only for emails that were **delivered**.

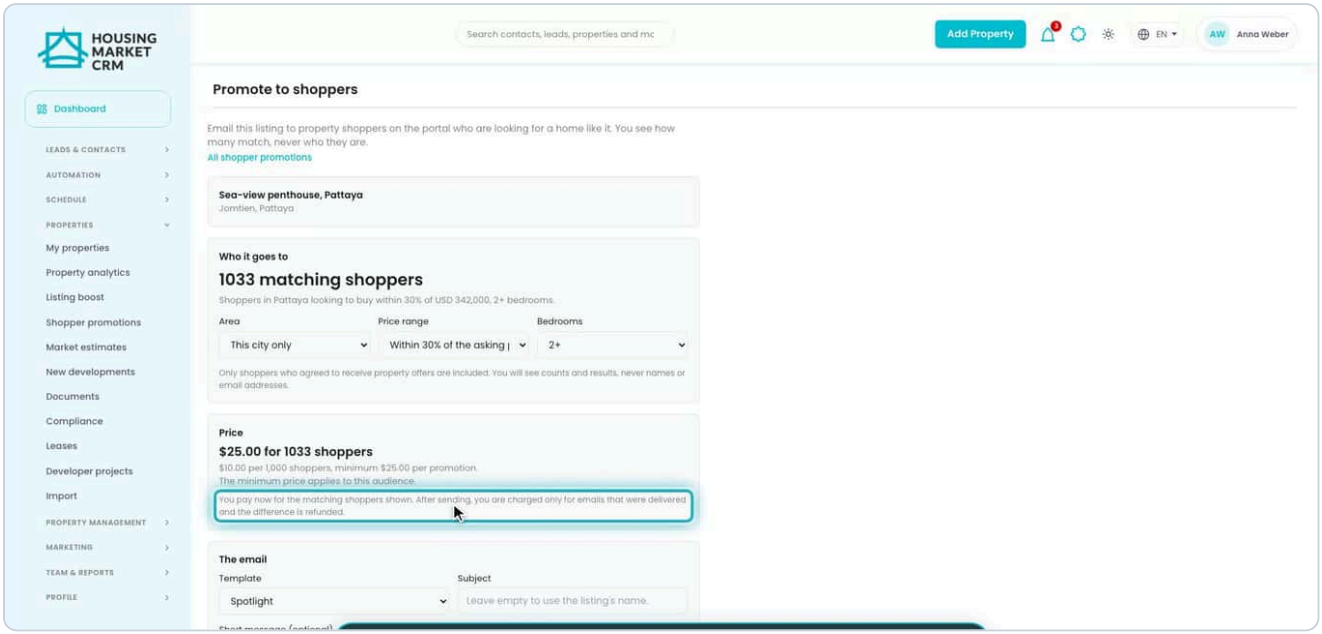


Figure 63.13 · Screen recorded 23 October 2026

14 Choose the **template**.

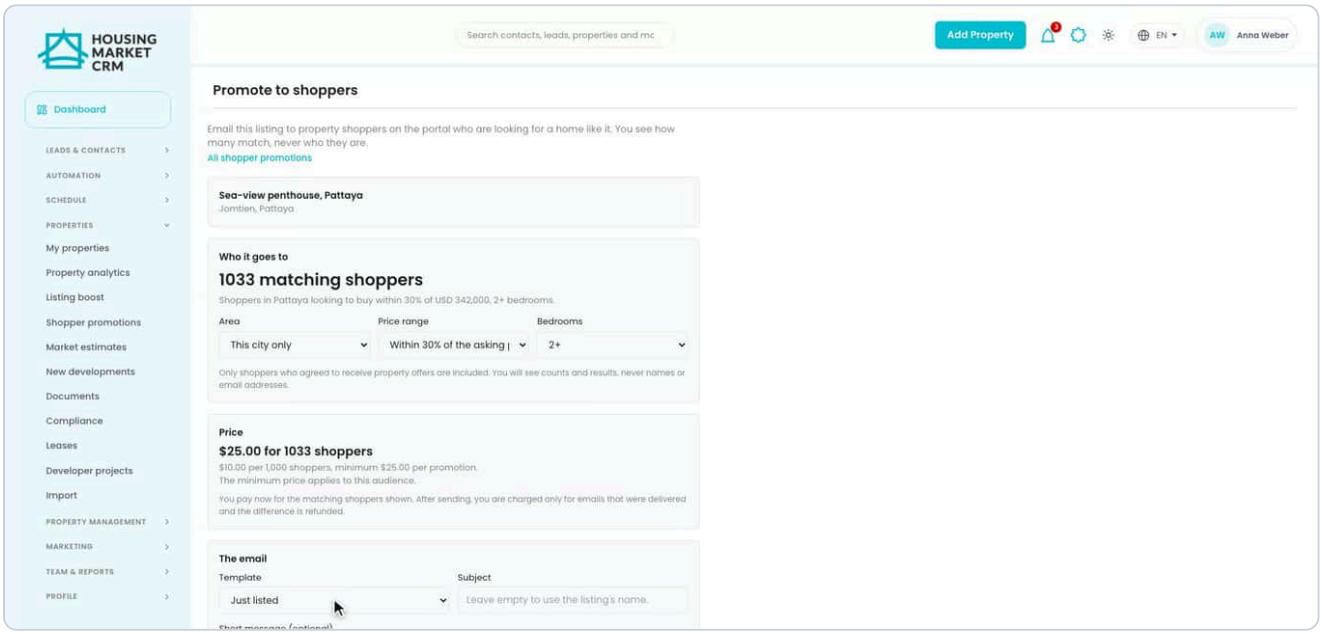


Figure 63.14 · Screen recorded 23 October 2026

15 Write a **subject line**, or leave it empty.

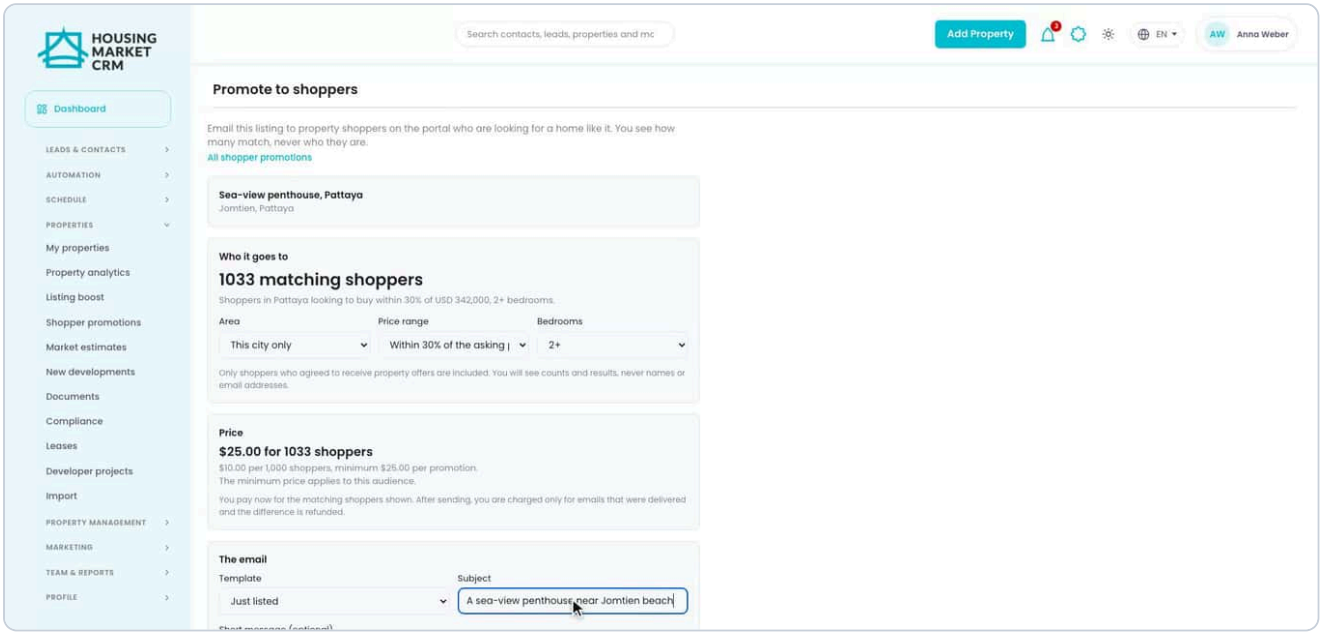


Figure 63.15 · Screen recorded 23 October 2026

16 The **preview** shows what shoppers will receive.

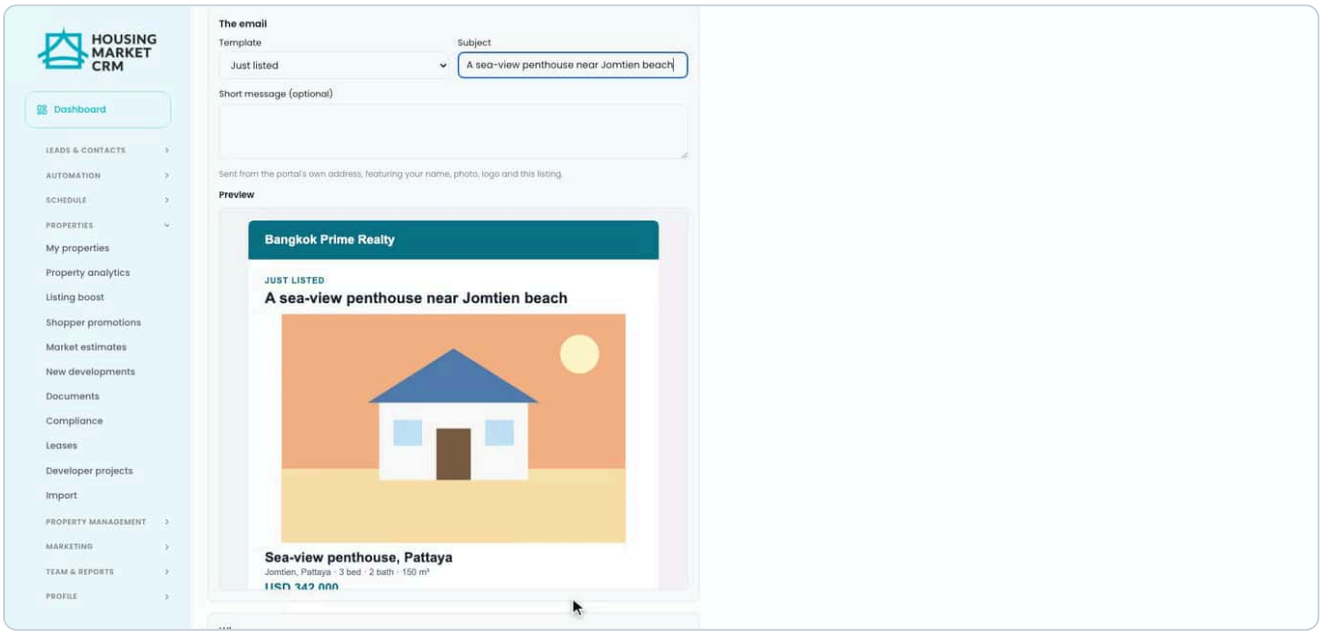


Figure 63.16 · Screen recorded 23 October 2026

17 Choose **when** to send. Every promotion is **reviewed** first.

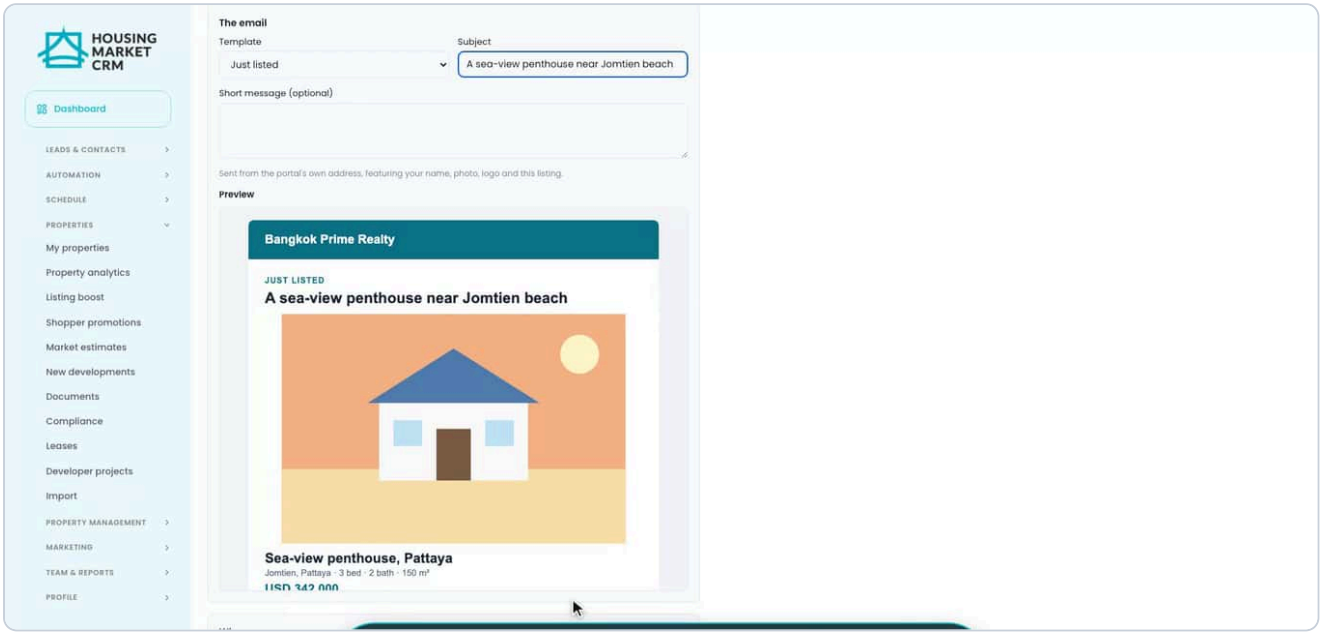


Figure 63.17 · Screen recorded 23 October 2026

18 Then **pay and send for review**. Payment opens a secure page.

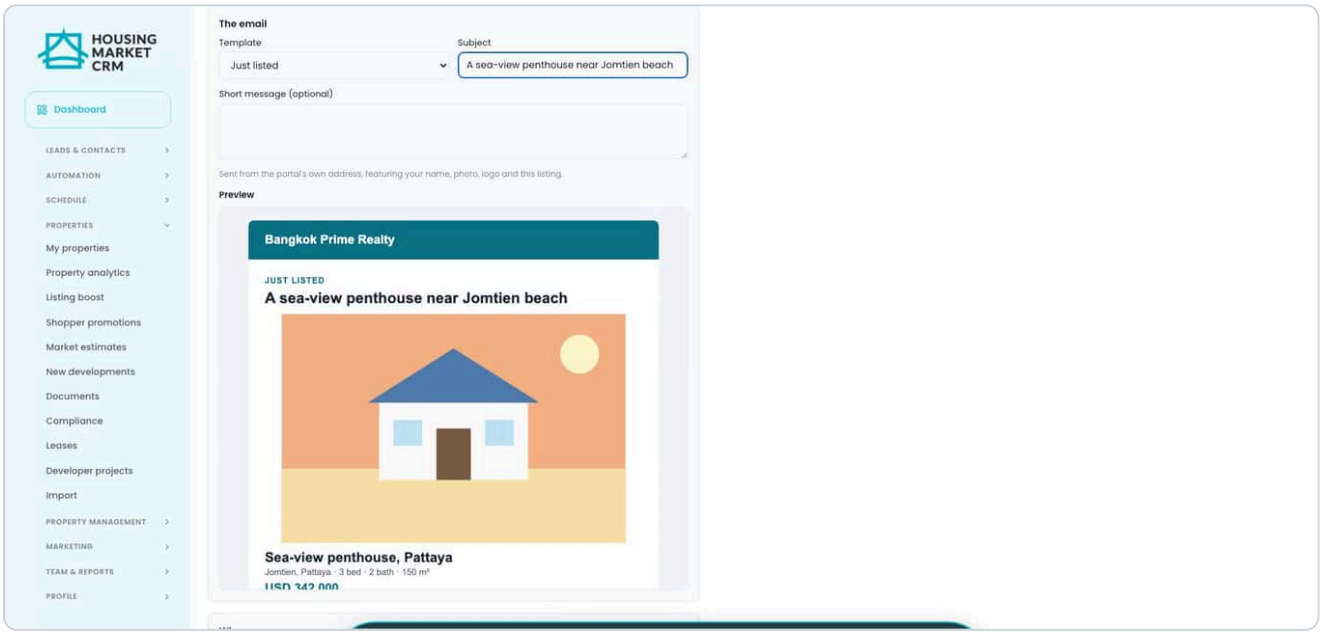


Figure 63.18 · Screen recorded 23 October 2026

19 Open **Shopper promotions** to see them all.

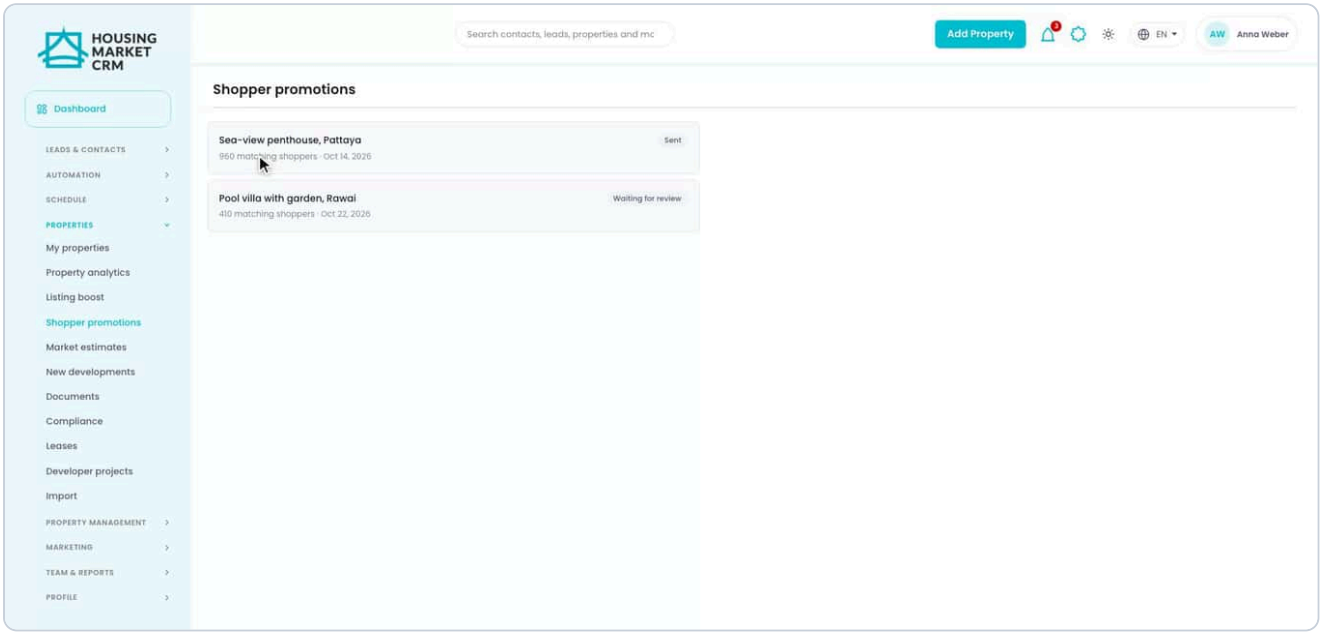


Figure 63.19 · Screen recorded 23 October 2026

20 Open a promotion that has been **sent**.

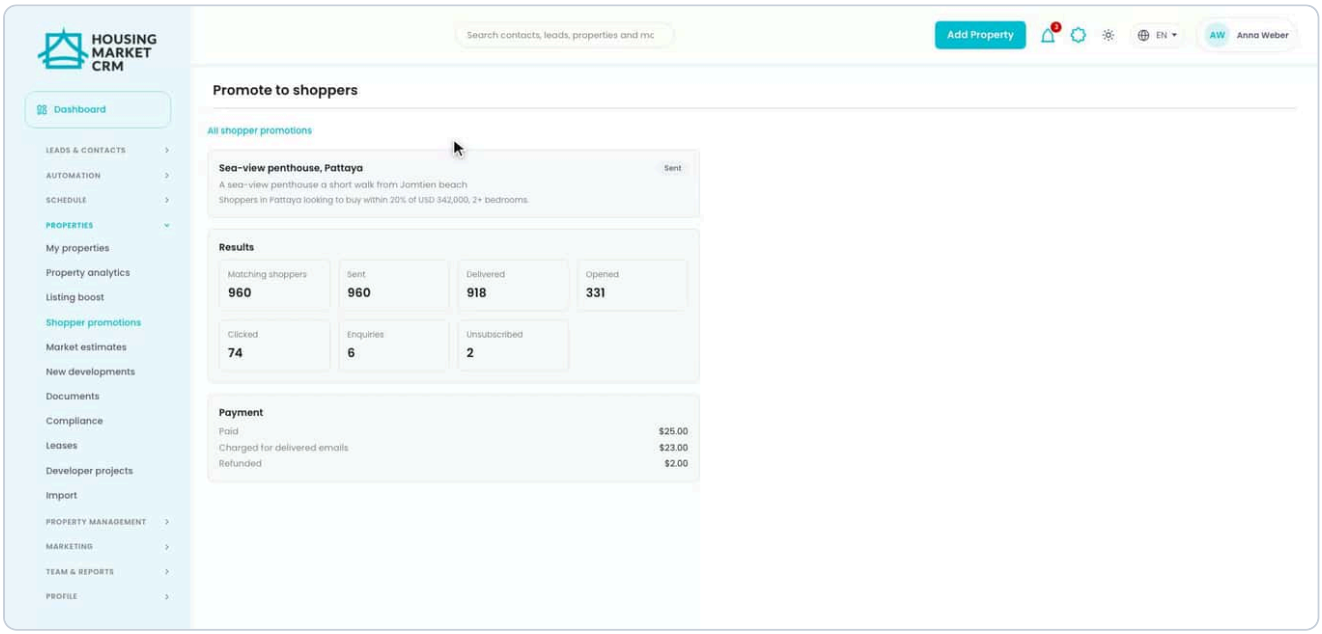


Figure 63.20 · Screen recorded 23 October 2026

21 See how many were **delivered**, **opened** and **clicked**.

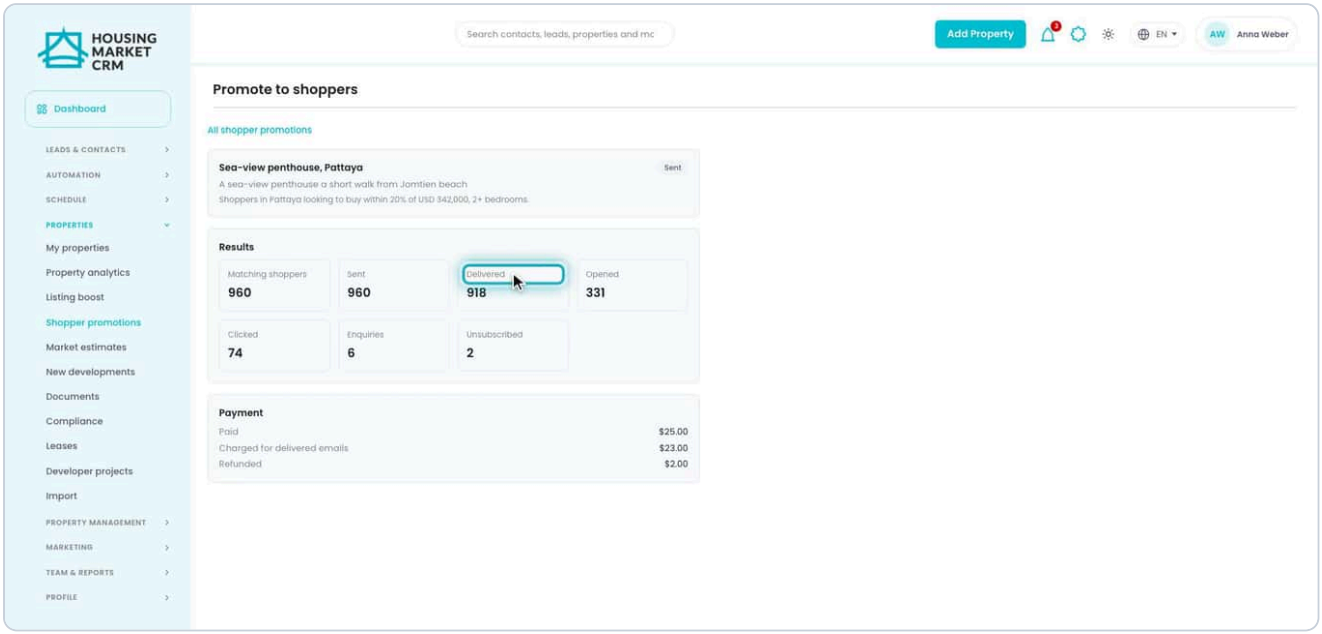


Figure 63.21 · Screen recorded 23 October 2026

22 You were charged for the delivered emails, and the **difference was refunded**.

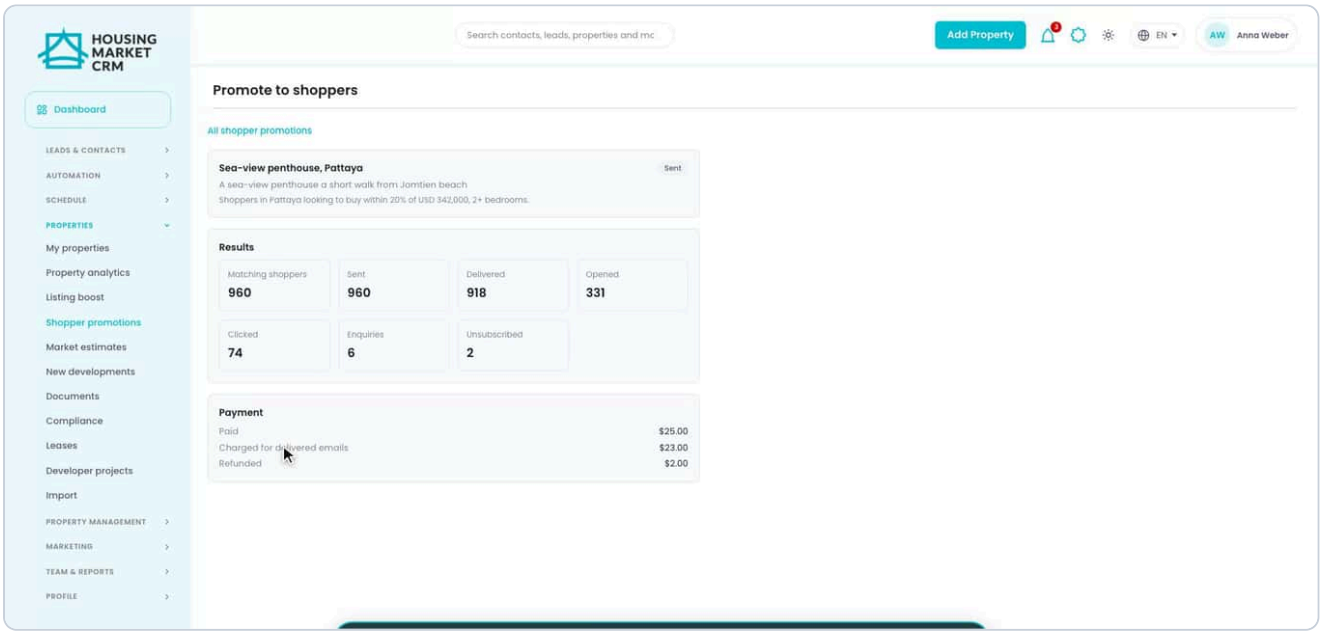


Figure 63.22 · Screen recorded 23 October 2026

RELATED HELP CENTER ARTICLES

What is a listing boost?	faq.housingmarketgroup.com/faq/what-is-a-listing-boost
Does the CRM work with Housing Market Ads?	faq.housingmarketgroup.com/faq/does-the-crm-work-with-housing-market-ads

64 CHAPTER 64

Connect your Microsoft 365 mailbox

Pro and Business | For agents and agencies | Watch the video

TODO No Help Center article covers this task yet, so this chapter has no explanation. Write the article, then map it in packages/handbooks/src/products/crm.ts. (Settings, Calendar connections, Microsoft 365 mailbox card; Beta.)

STEP BY STEP

1 Open your **Housing Market CRM** account.

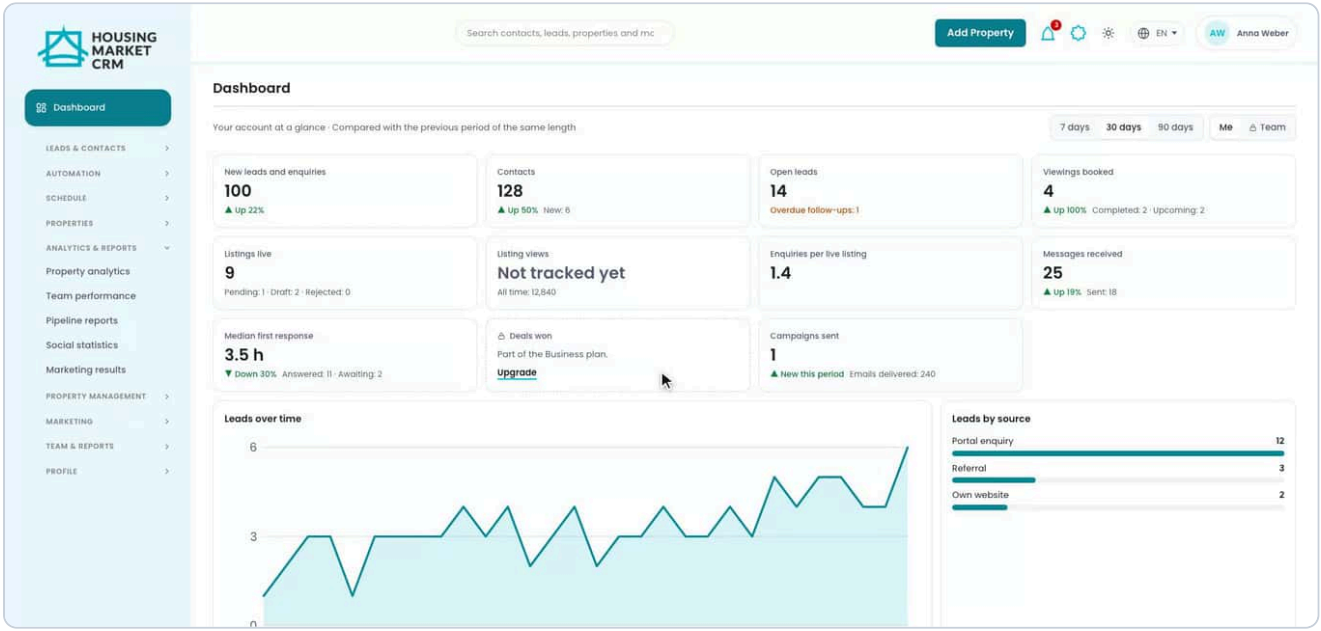


Figure 64.1 · Screen recorded 5 November 2026

2 Click the **Settings** icon at the top.

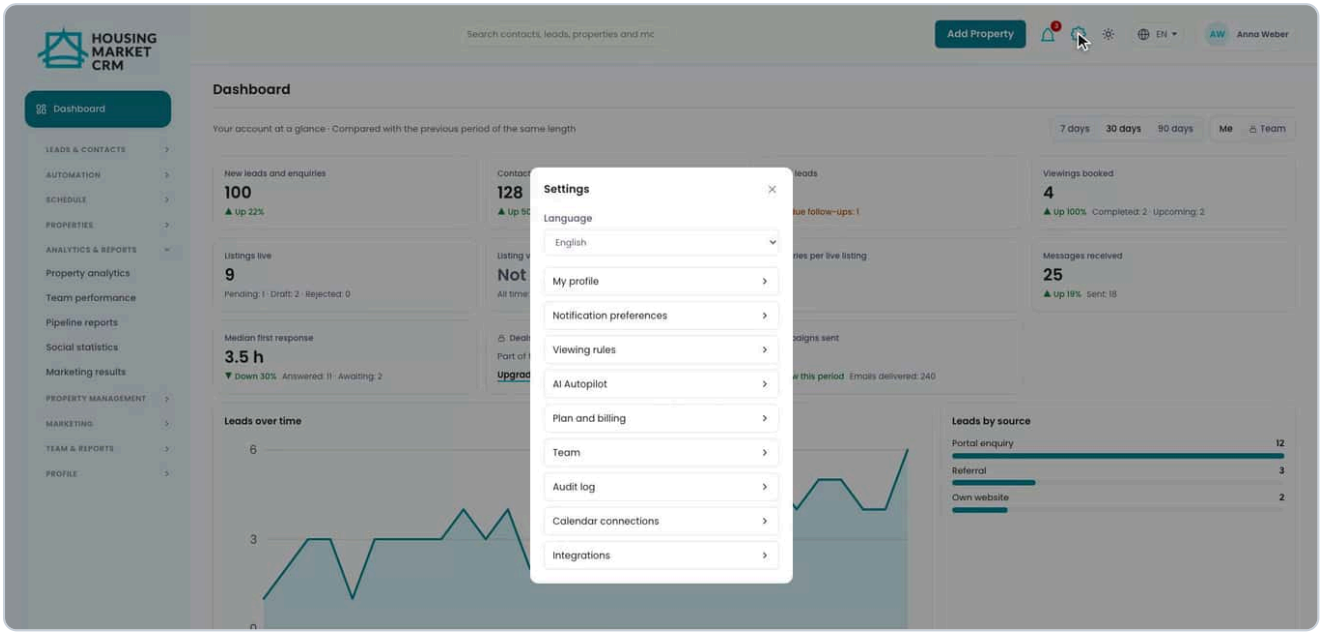


Figure 64.2 · Screen recorded 5 November 2026

3 Choose **Calendar connections**.

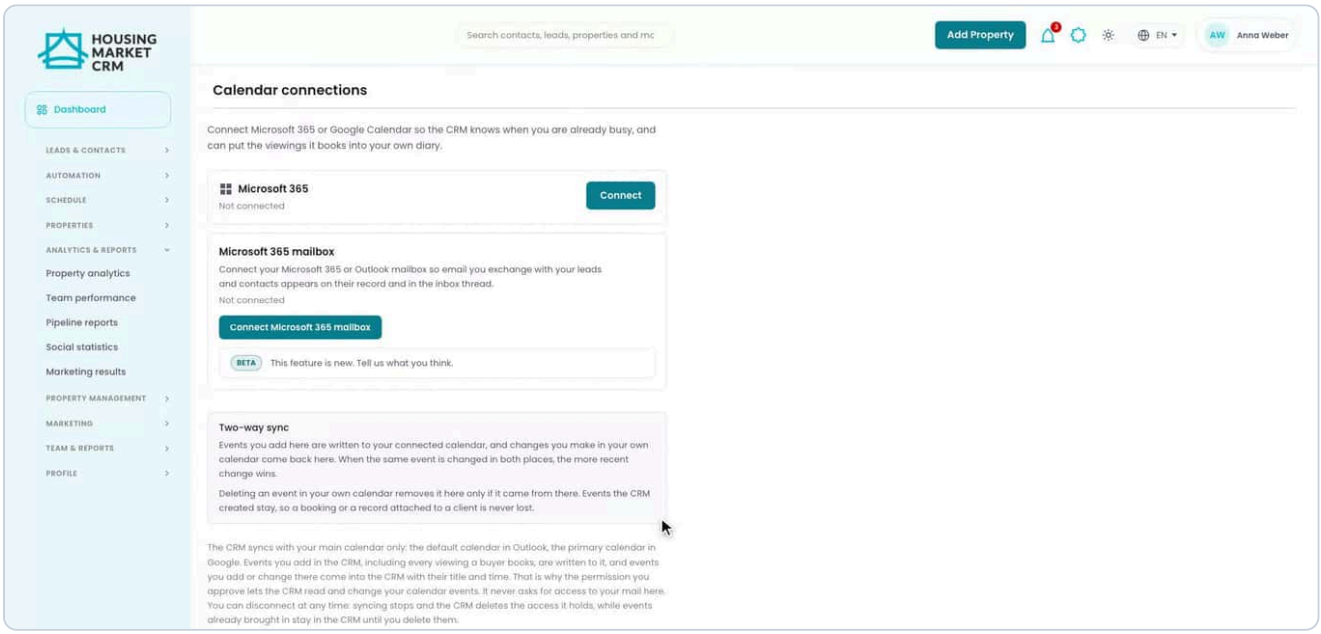


Figure 64.3 · Screen recorded 5 November 2026

4 Find the **Microsoft 365 mailbox** card.

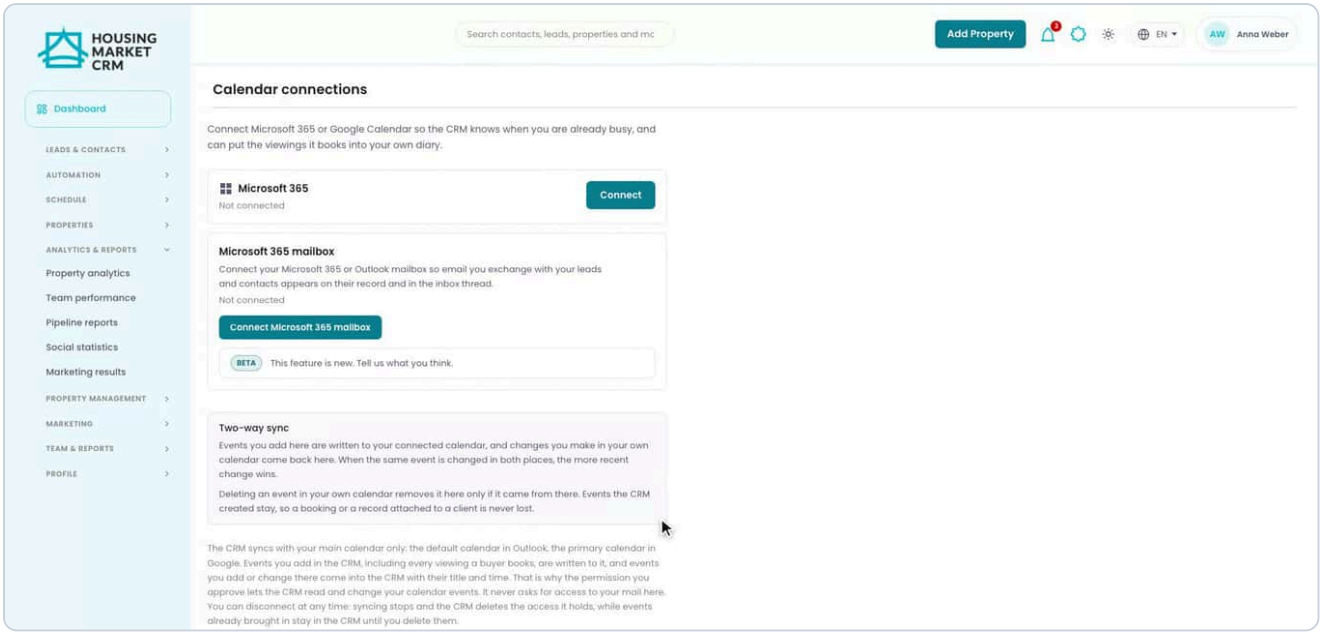


Figure 64.4 · Screen recorded 5 November 2026

5 Click **Connect**.

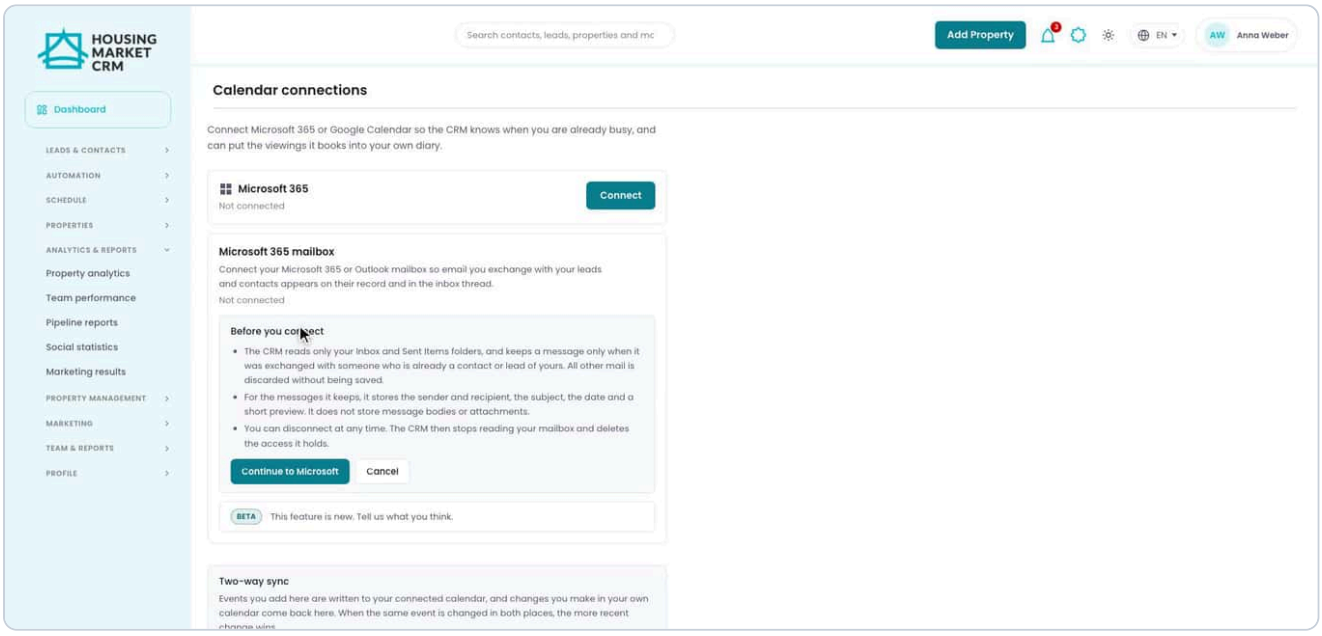


Figure 64.5 · Screen recorded 5 November 2026

6 The CRM tells you **what it reads**, **what it keeps** and **how to disconnect**.

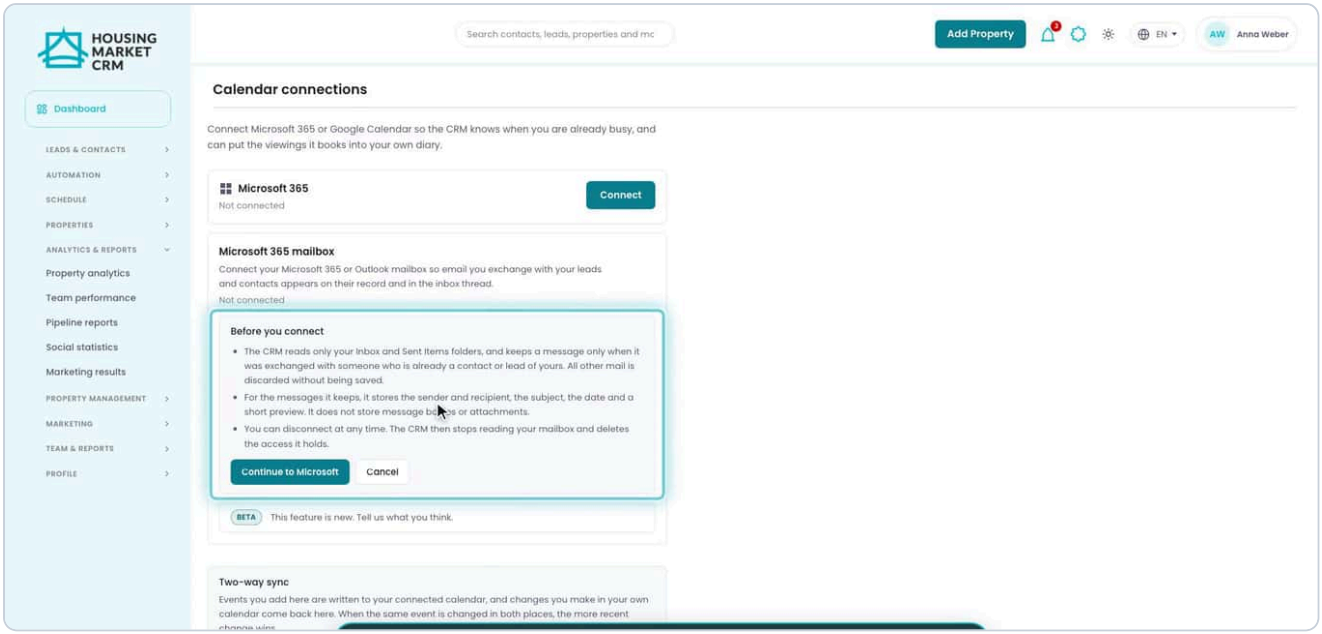


Figure 64.6 · Screen recorded 5 November 2026

7 **Continue to Microsoft** opens Microsoft's own page.

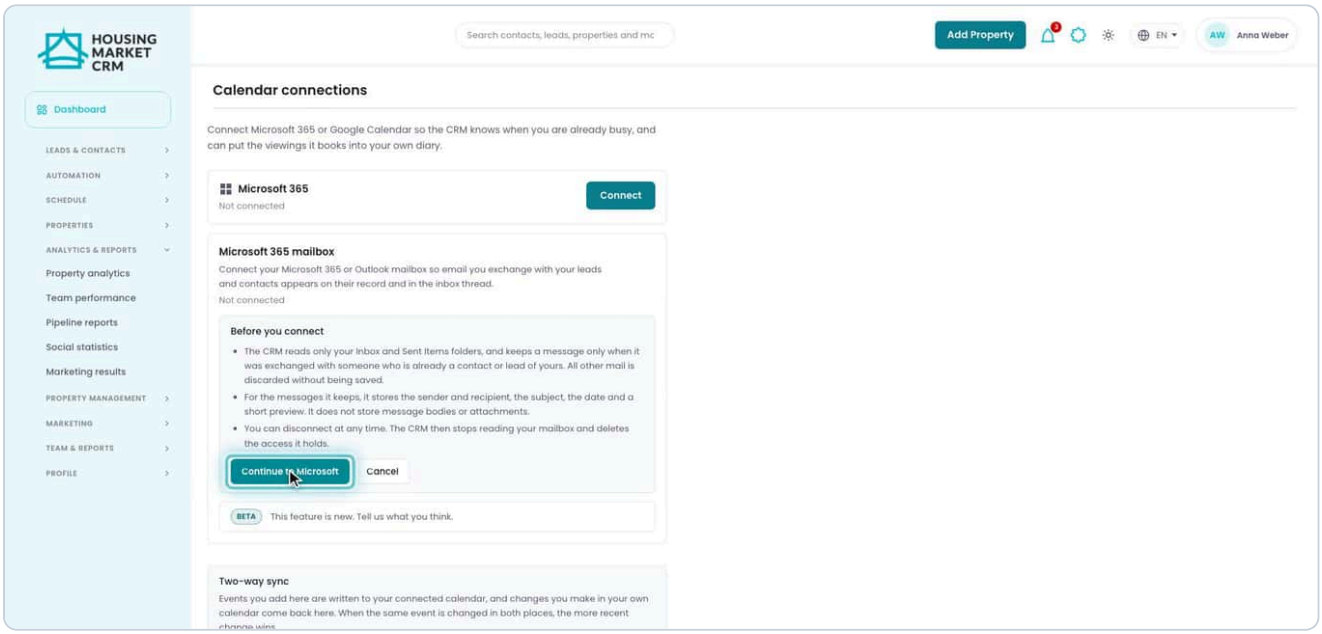


Figure 64.7 · Screen recorded 5 November 2026

8 Sign in and allow access there, then return to the CRM.

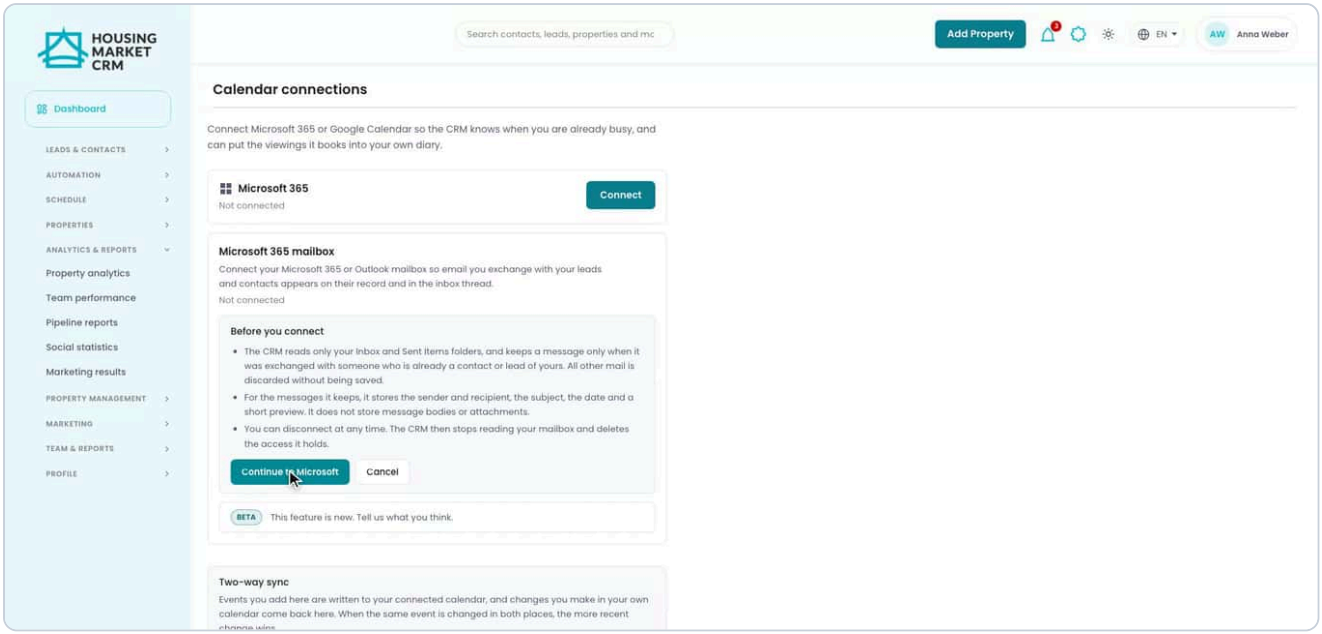


Figure 64.8 · Screen recorded 5 November 2026

RELATED HELP CENTER ARTICLES

Can I sync the CRM with my calendar?	faq.housingmarketgroup.com/faq/can-i-sync-the-crm-with-my-calendar
Is my data secure?	faq.housingmarketgroup.com/faq/is-my-data-secure

65 CHAPTER 65

Disconnect your Microsoft 365 mailbox

Pro and Business | For agents and agencies | Watch the video

TODO No Help Center article covers this task yet, so this chapter has no explanation. Write the article, then map it in packages/handbooks/src/products/crm.ts. (Settings, Calendar connections; Beta.)

STEP BY STEP

1 Open your **Housing Market CRM** account.

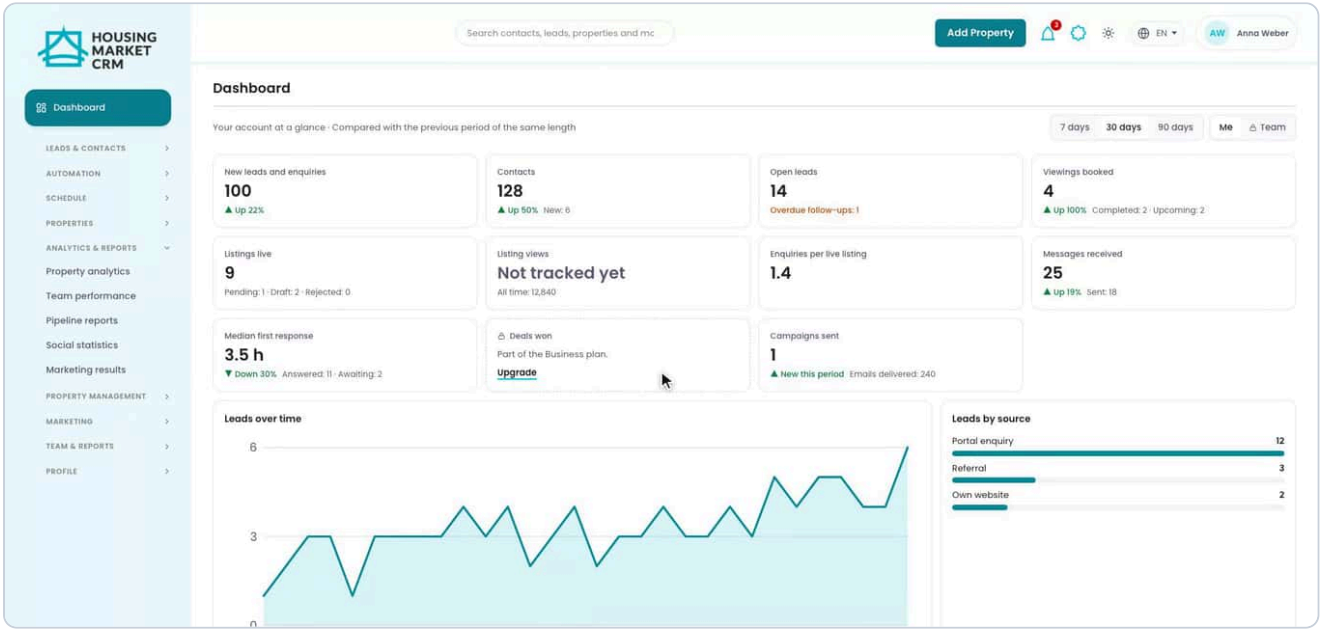


Figure 65.1 · Screen recorded 5 November 2026

2 Click the **Settings** icon at the top.

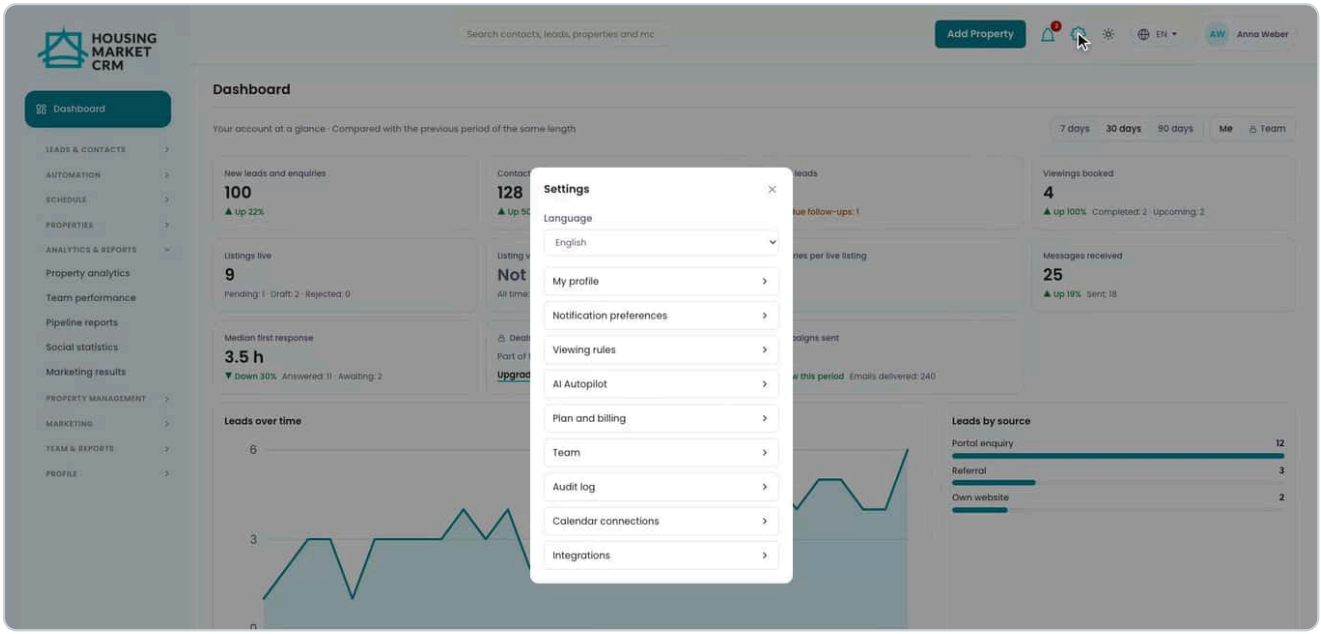


Figure 65.2 · Screen recorded 5 November 2026

3 Choose **Calendar connections**.

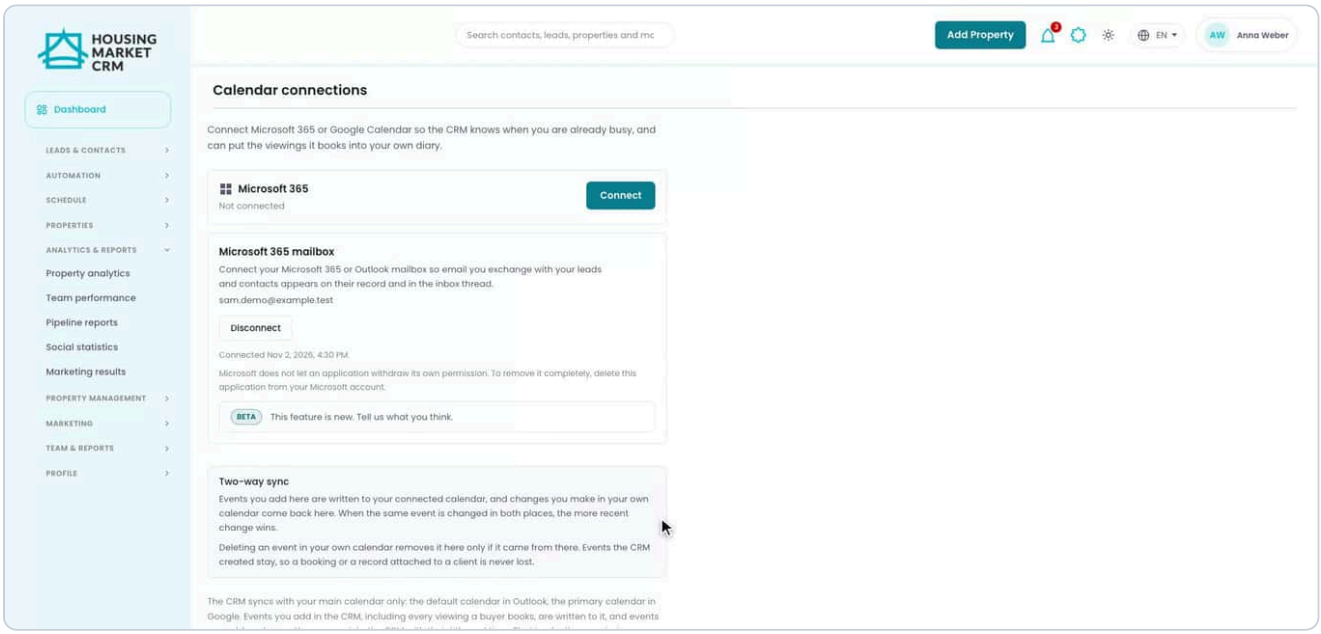


Figure 65.3 · Screen recorded 5 November 2026

4 The **Microsoft 365 mailbox** card shows the account that is connected.

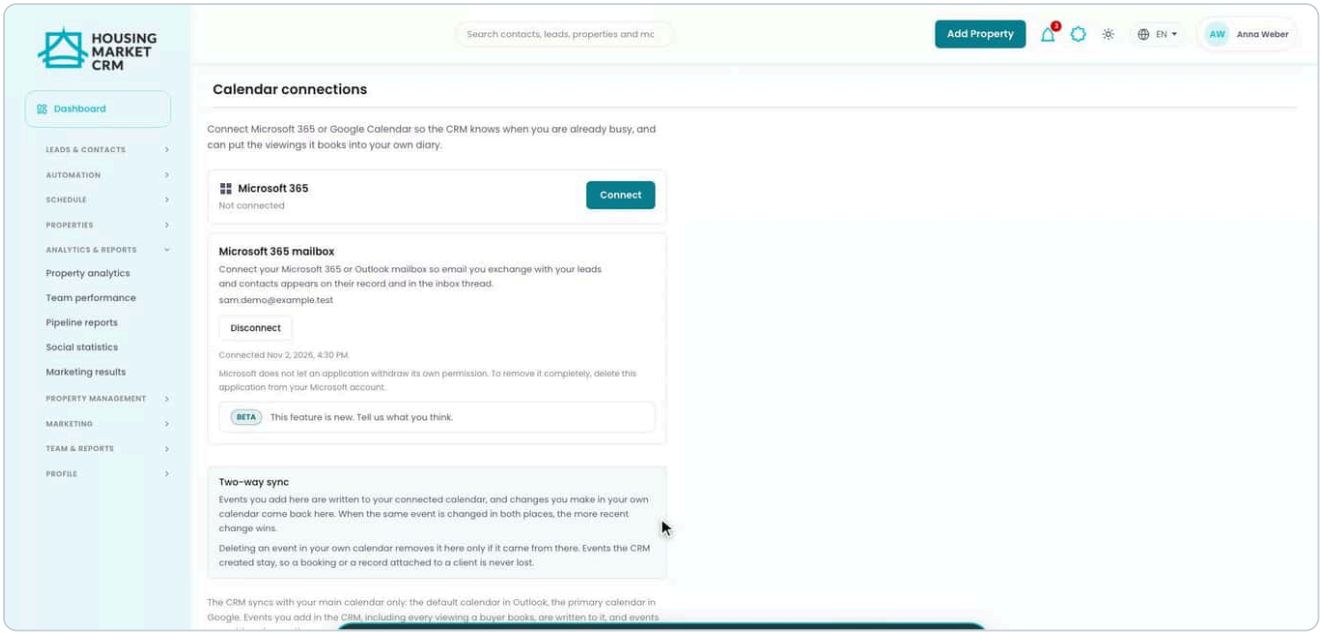


Figure 65.4 · Screen recorded 5 November 2026

5 It also shows **when** you connected it.

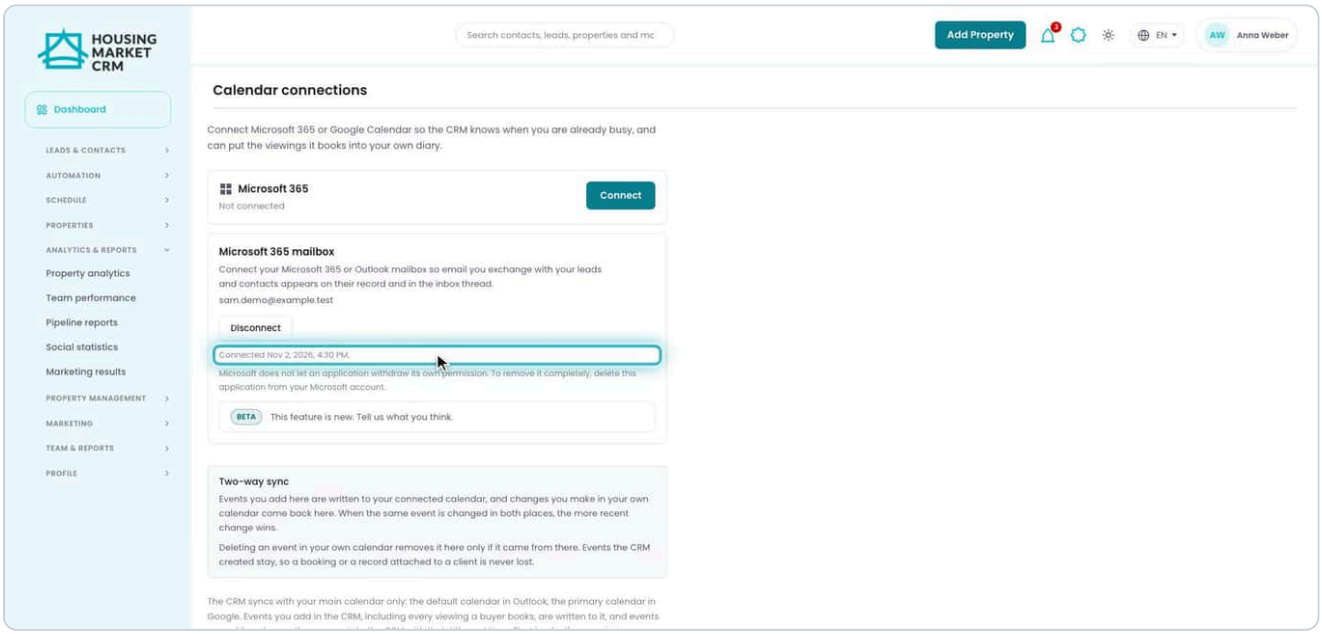


Figure 65.5 · Screen recorded 5 November 2026

6 Select **Disconnect.**

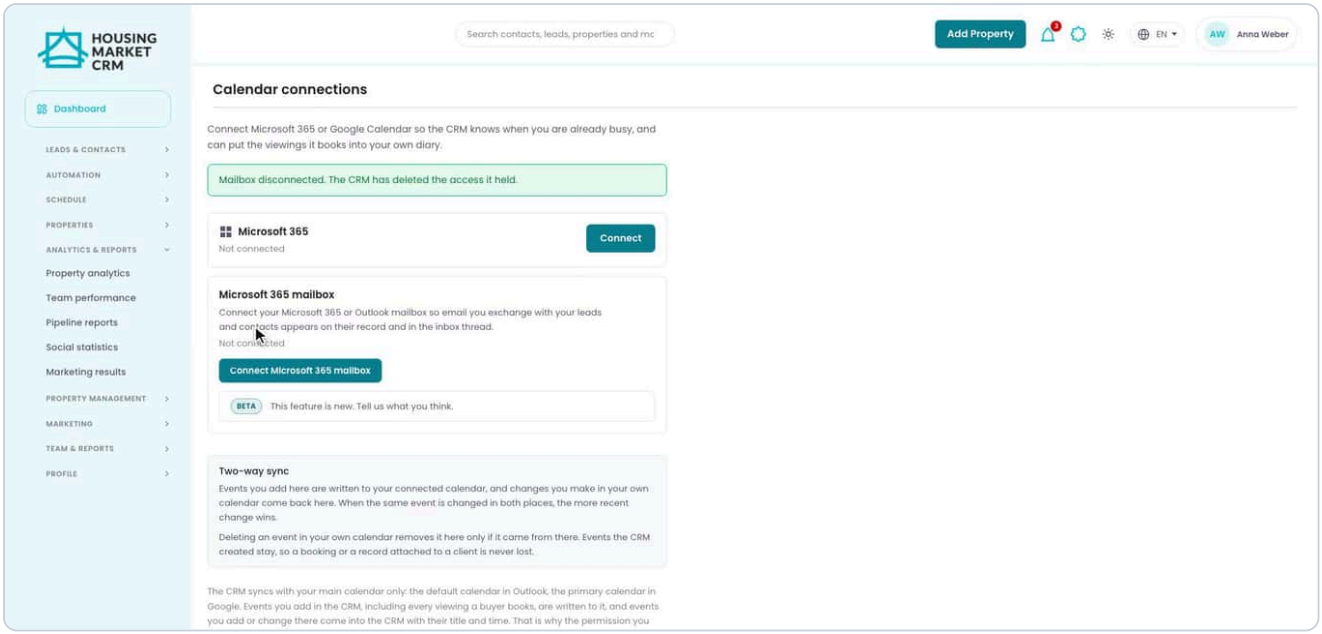


Figure 65.6 · Screen recorded 5 November 2026

7 The CRM **deletes the access it held** and stops reading your mailbox.

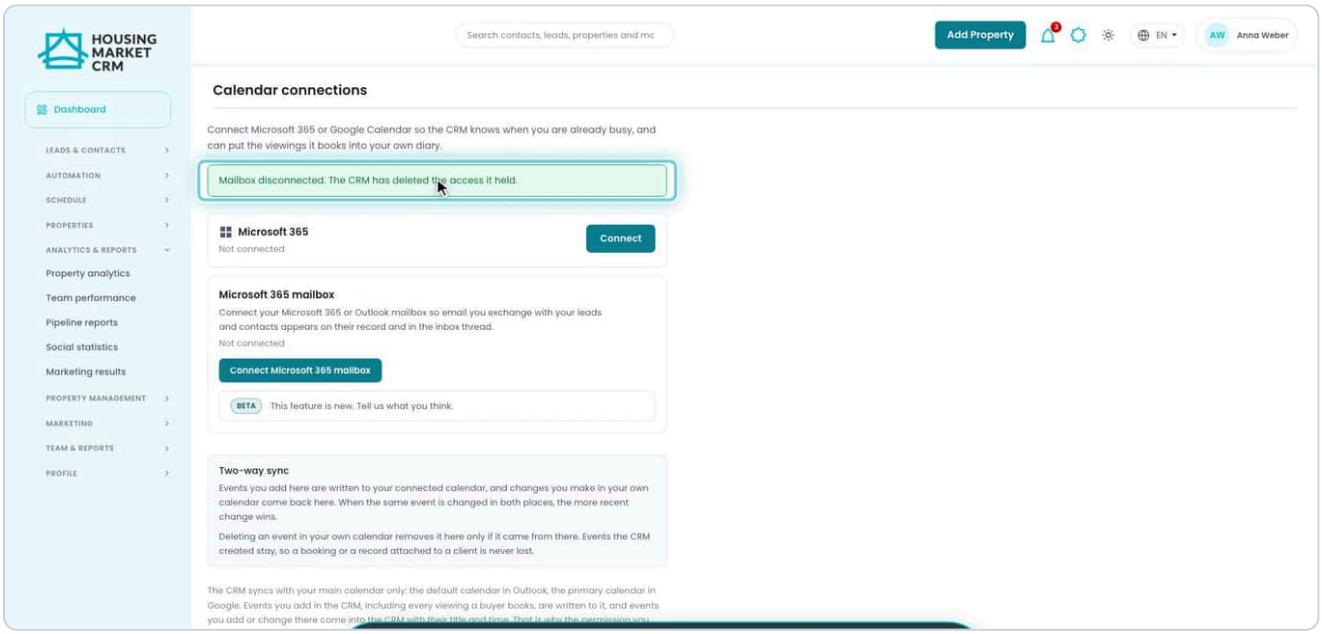


Figure 65.7 · Screen recorded 5 November 2026

8 You can **connect again** at any time.

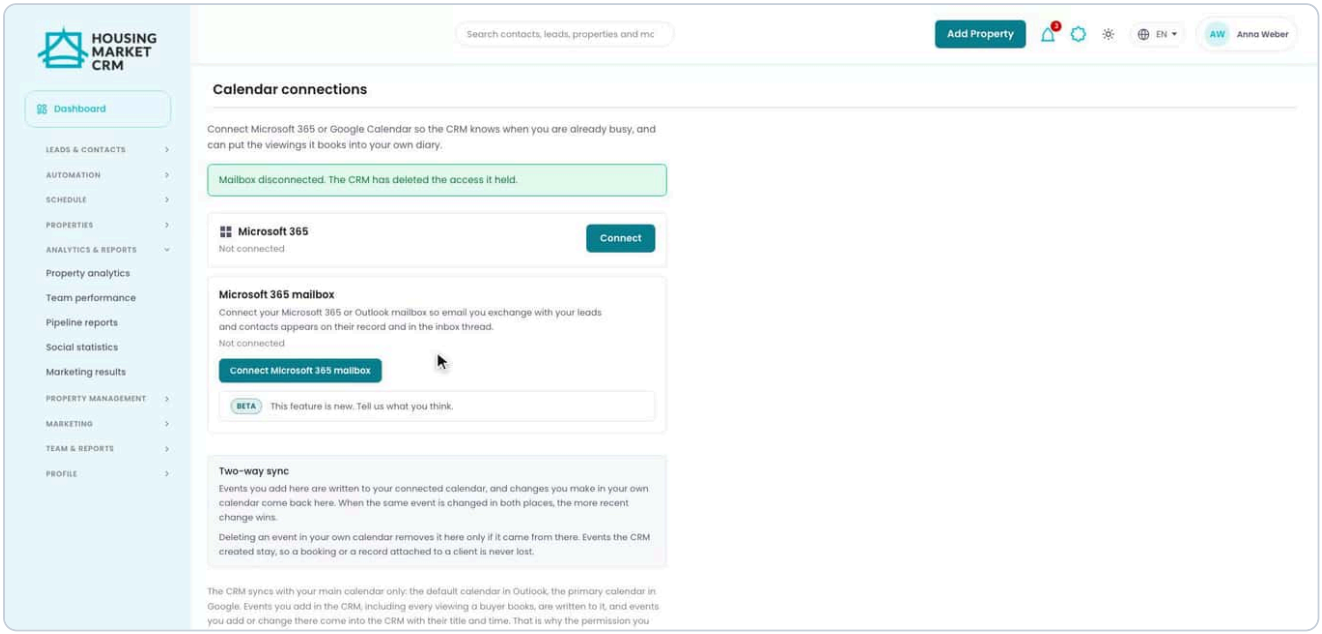


Figure 65.8 · Screen recorded 5 November 2026

RELATED HELP CENTER ARTICLES

Can I sync the CRM with my calendar?	faq.housingmarketgroup.com/faq/can-i-sync-the-crm-with-my-calendar

66 CHAPTER 66

Reconnect your Microsoft 365 mailbox

Pro and Business | For agents and agencies | Watch the video

TODO No Help Center article covers this task yet, so this chapter has no explanation. Write the article, then map it in packages/handbooks/src/products/crm.ts. (When a connection expires the mailbox card says so and the mailbox cannot sync until it is reconnected; Beta.)

STEP BY STEP

1 Open your **Housing Market CRM** account.

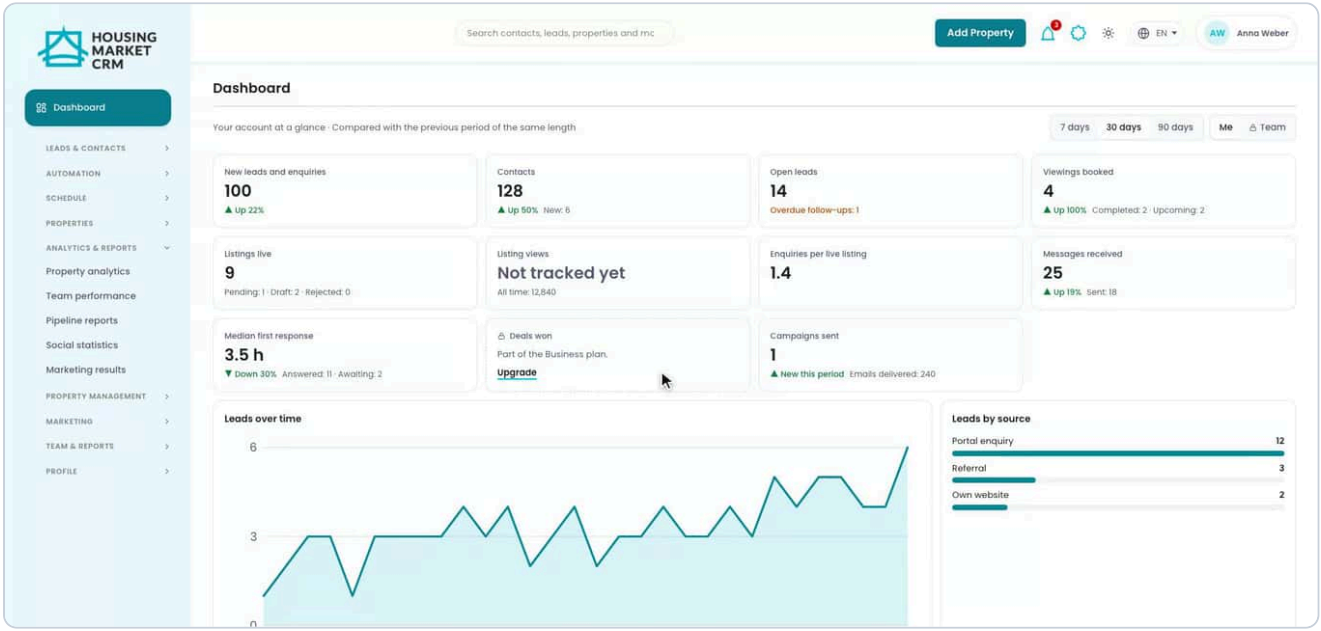


Figure 66.1 · Screen recorded 5 November 2026

2 Click the **Settings** icon at the top.

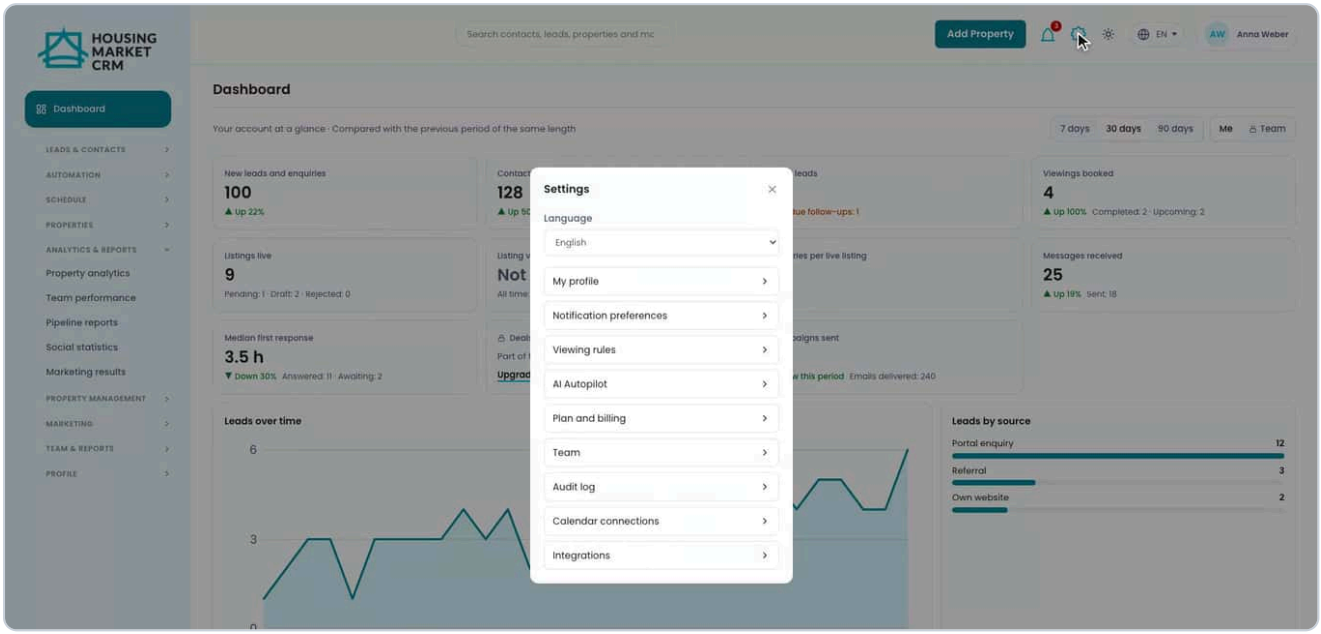


Figure 66.2 · Screen recorded 5 November 2026

3 Choose **Calendar connections**.

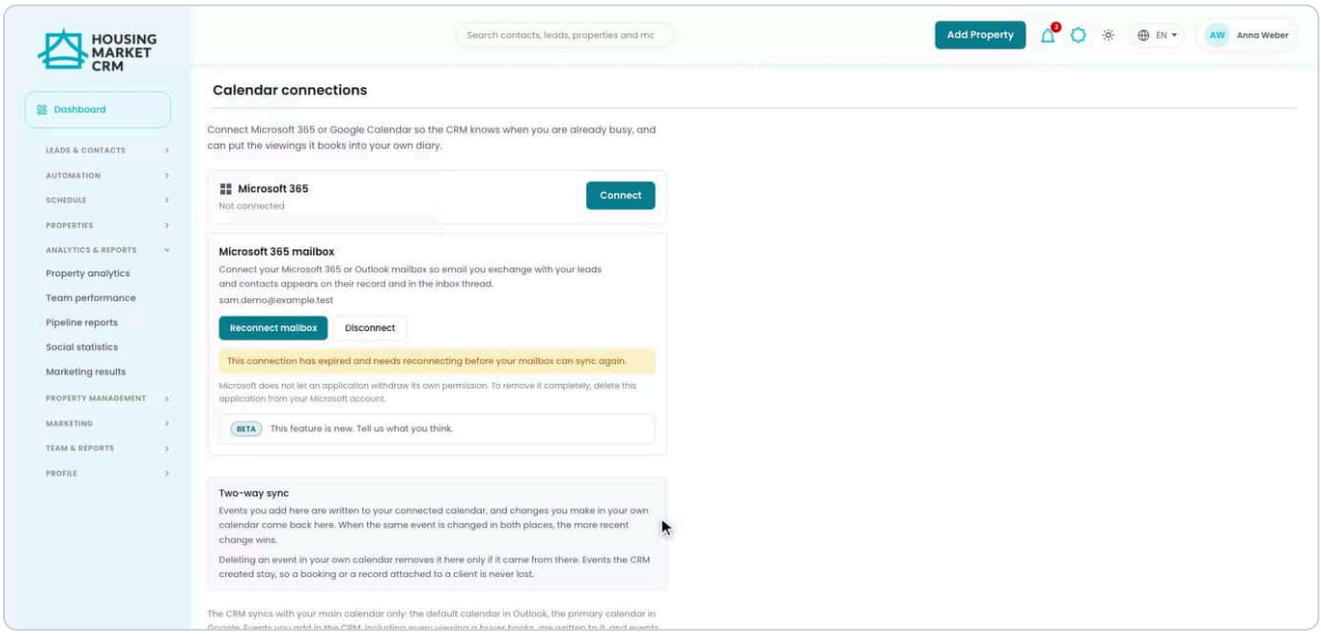


Figure 66.3 · Screen recorded 5 November 2026

4 When a connection **expires**, the mailbox card says so.

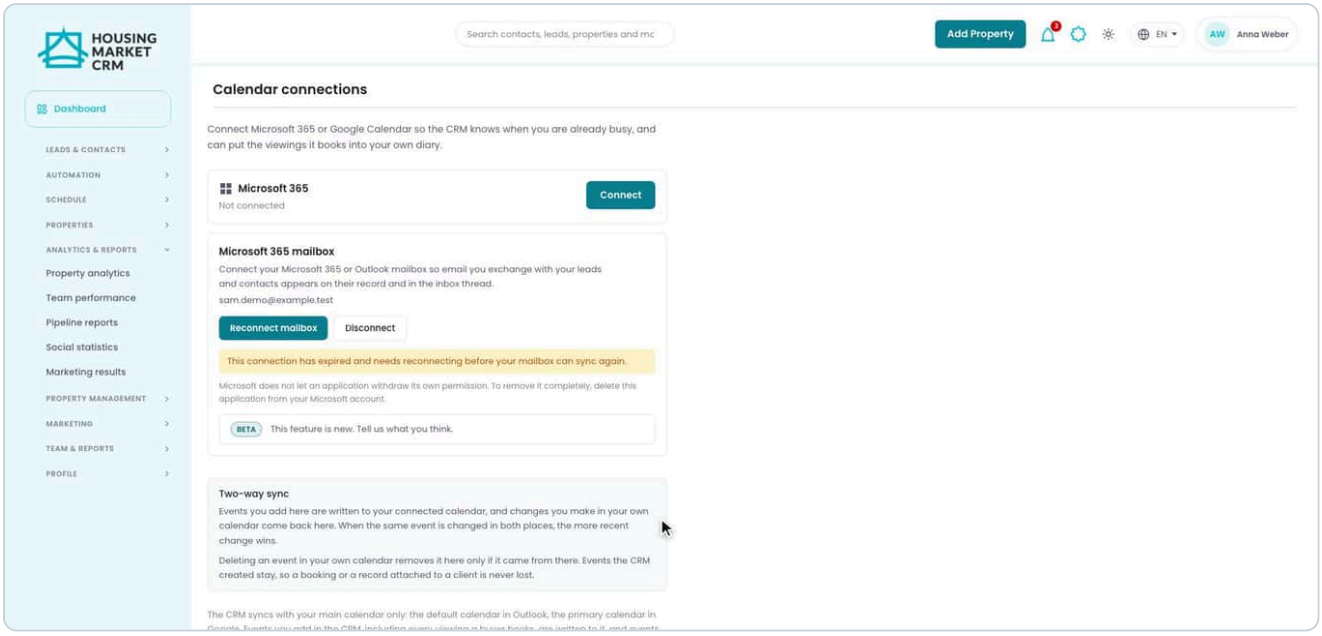


Figure 66.4 · Screen recorded 5 November 2026

5 Your mailbox **cannot sync** until you reconnect.

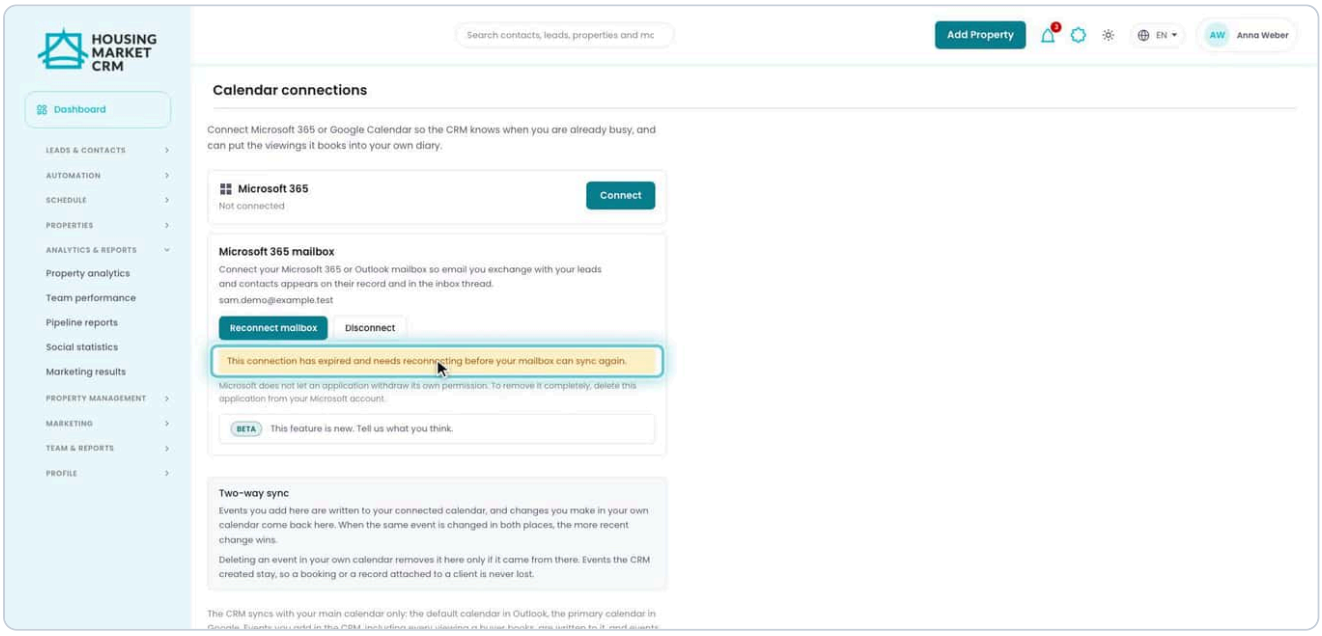


Figure 66.5 · Screen recorded 5 November 2026

6 Select **Reconnect mailbox**.

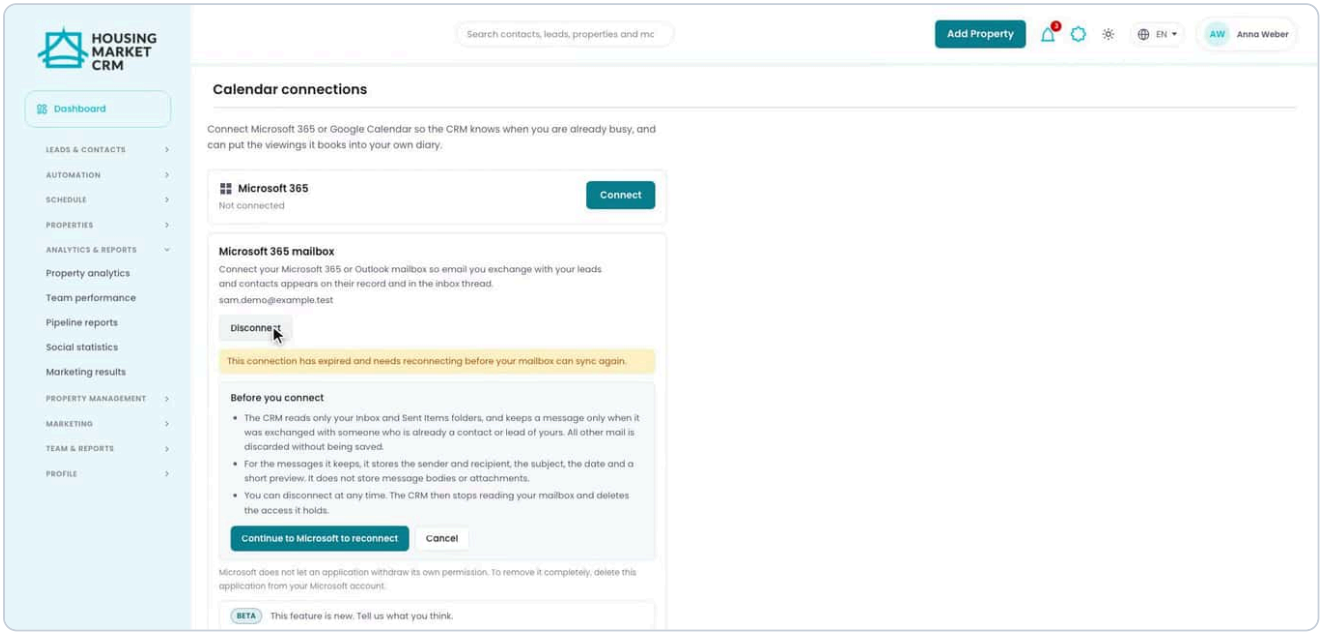


Figure 66.6 · Screen recorded 5 November 2026

7 First the CRM tells you **what it reads**, **what it keeps** and **how to disconnect**.

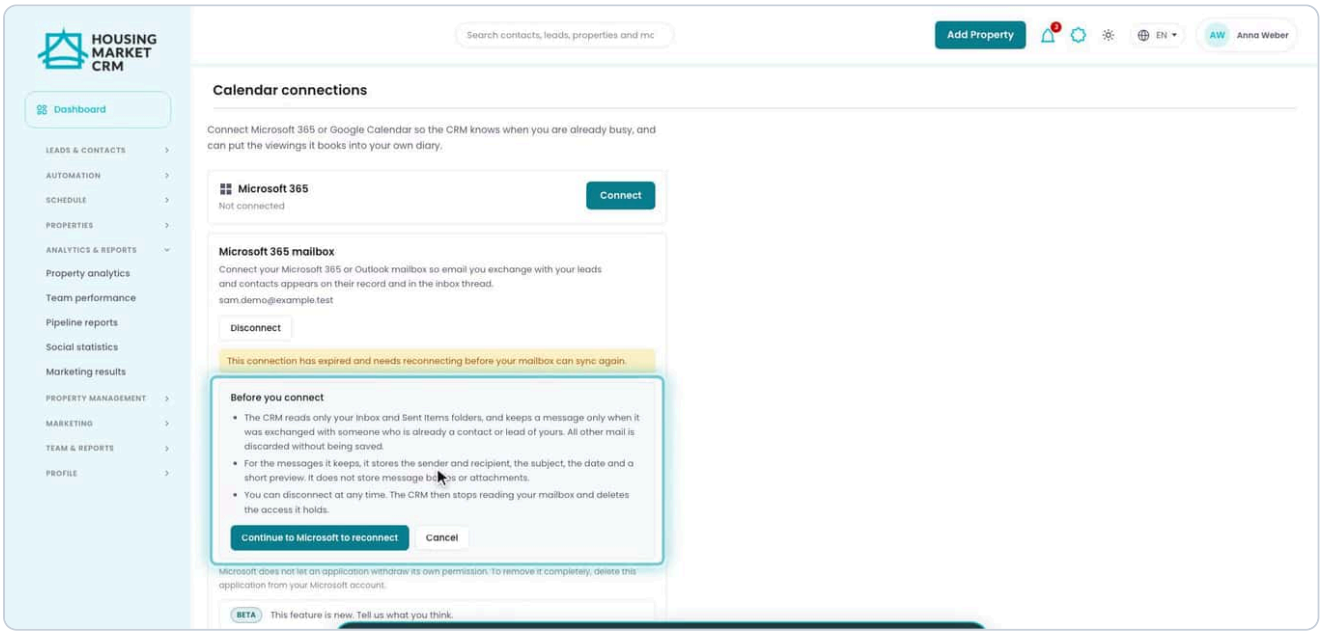


Figure 66.7 · Screen recorded 5 November 2026

8 **Continue to Microsoft** opens Microsoft's own page.

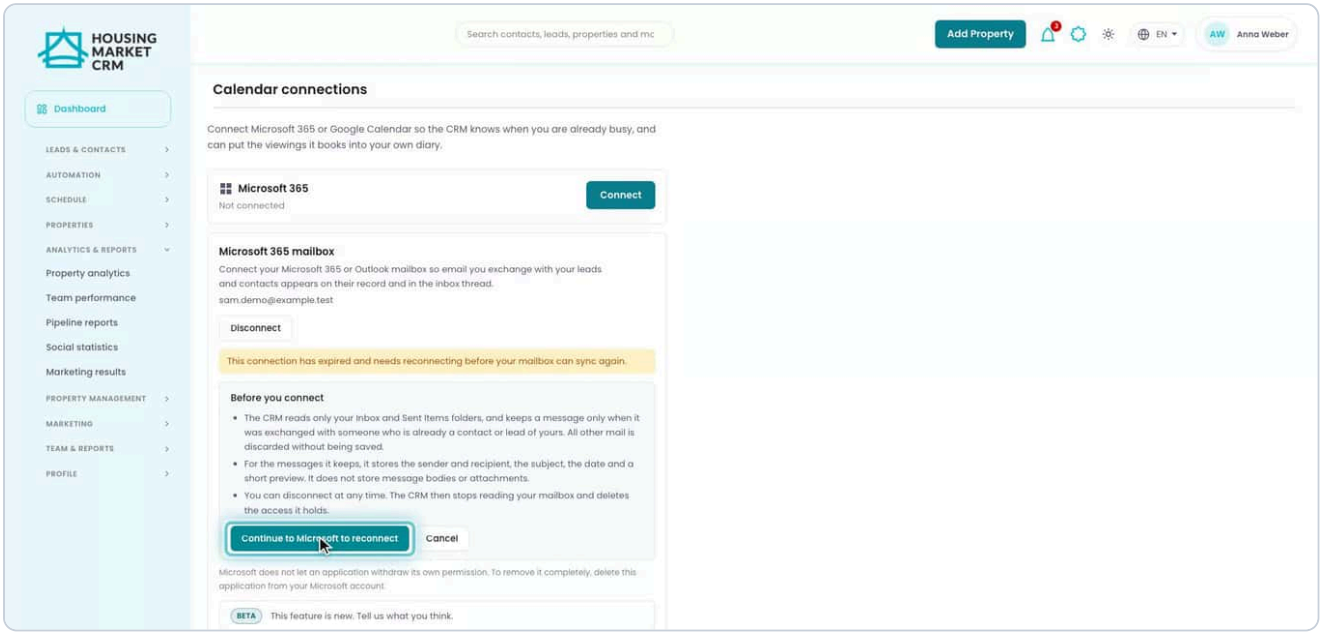


Figure 66.8 · Screen recorded 5 November 2026

9 Sign in and allow access there, then return to the CRM. We stop here.

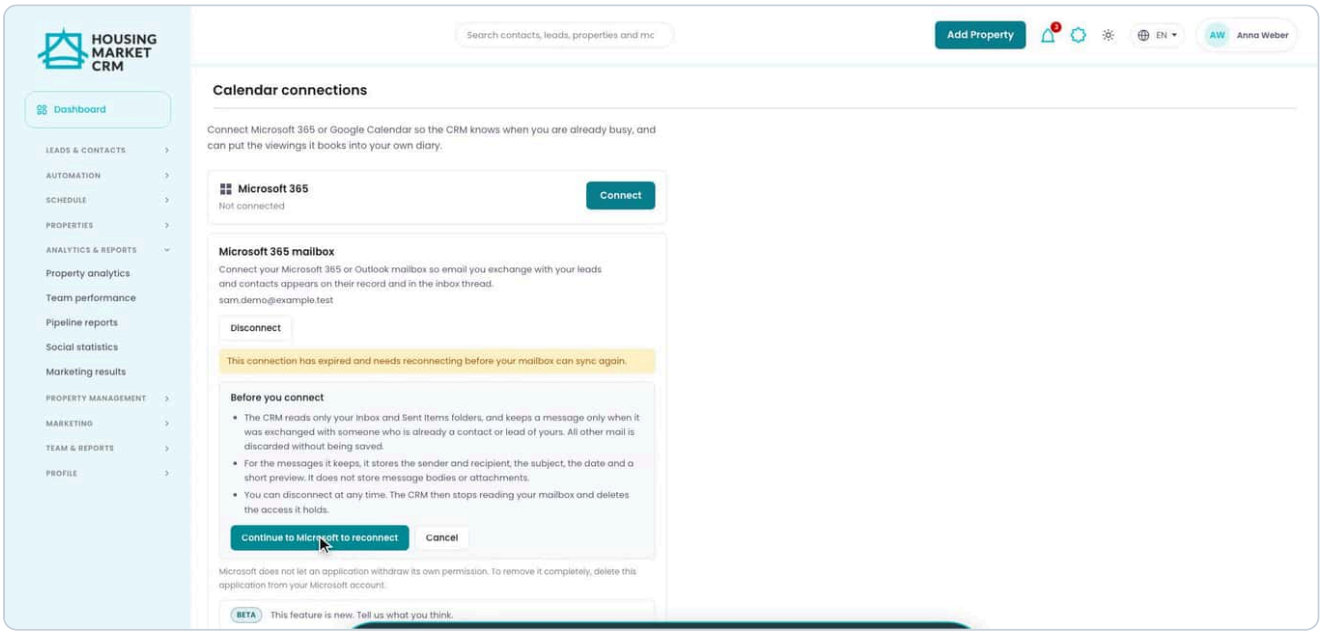


Figure 66.9 · Screen recorded 5 November 2026

RELATED HELP CENTER ARTICLES

Can I sync the CRM with my calendar?	faq.housingmarketgroup.com/faq/can-i-sync-the-crm-with-my-calendar

67 CHAPTER 67

Unanswered lead reminders

All plans | For agents and agencies | Watch the video

OVERVIEW

Yes. When the last message on one of your leads came in and nobody has replied, the CRM emails you after a few hours, inside your working hours. On Business it can also tell your office manager.

The reminder is in Settings, Notifications, in the card Unanswered leads. It is on until you switch it off. Every hour the CRM looks for leads whose most recent message came in from the buyer and has had no reply. When one has waited longer than your first limit, the CRM emails you: the lead's details and two buttons, Snooze until tomorrow and Mark handled. The buttons in the email work for seven days.

When it is sent

- Only inside your working hours. They are the ones you set under Settings, Viewings; if you never set them, the CRM uses Monday to Saturday, 09:00 to 18:00 in your portal's time zone. A reminder that falls outside them waits for the next working hour.
- Once for each message from the buyer: if the buyer writes again and nobody answers, a new reminder can follow.
- Replying clears it. There is nothing to tick off: once your reply is the last message on the lead, the reminder stops.
- By email only. If you set the channel of this notification to the bell only under Settings, Notifications, you switch the reminder off.

Choose the timing

Remind me after is how long a lead may sit unanswered before the CRM emails you: 1, 2, 4, 8 or 24 hours, and 4 hours until you change it. Tell my office manager after is how long it may sit before the CRM also emails someone in your office who can reassign it: 4, 8, 24, 48 or 72 hours, and 24 hours until you change it. Choose Save reminder settings to keep your choice.

Telling the office manager is part of Business. It needs an office in which another person, an admin or a manager, can reassign leads. On any other plan, or in an account with nobody to pass a lead to, that choice does nothing, and the screen says so. To stop the reminders, untick Remind me about unanswered leads and save.

What the CRM cannot see yet

The reminder reads the enquiries and messages the CRM holds, the replies on the portal, the emails the CRM sent and your calls. A reply the buyer sends by email, and any reply sent through WhatsApp, which is not connected to the CRM yet, are not seen, so use Mark handled in the email for those.

From the Help Center: **Does the CRM remind me about a lead I have not answered?**

STEP BY STEP

1 Open **Settings**, then **Notifications**.

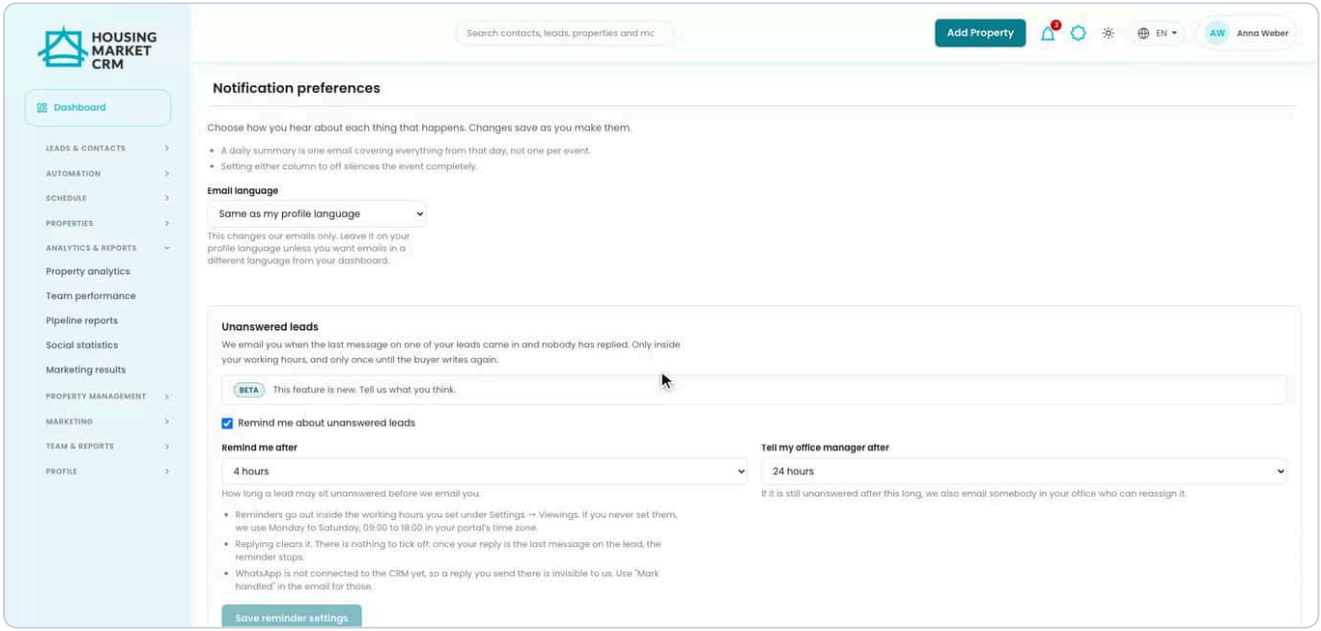


Figure 67.1 · Screen recorded 5 November 2026

2 Find the **Unanswered leads** card.

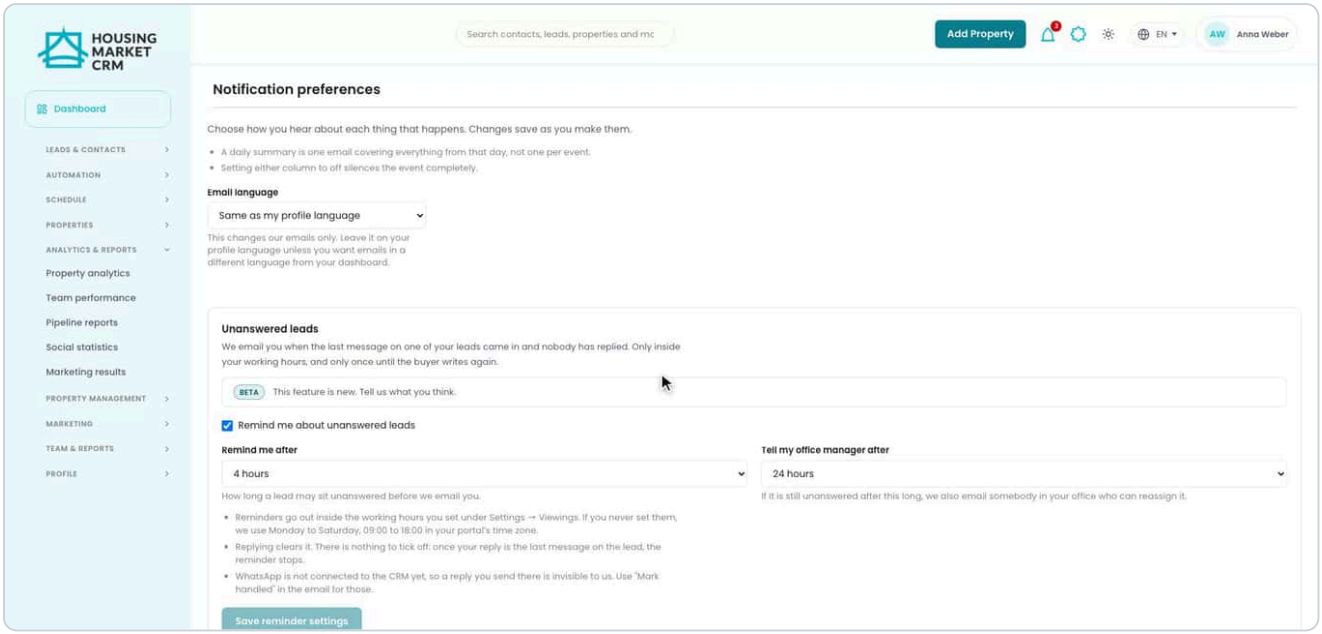


Figure 67.2 · Screen recorded 5 November 2026

3 If a buyer writes and **nobody replies**, the CRM emails you.

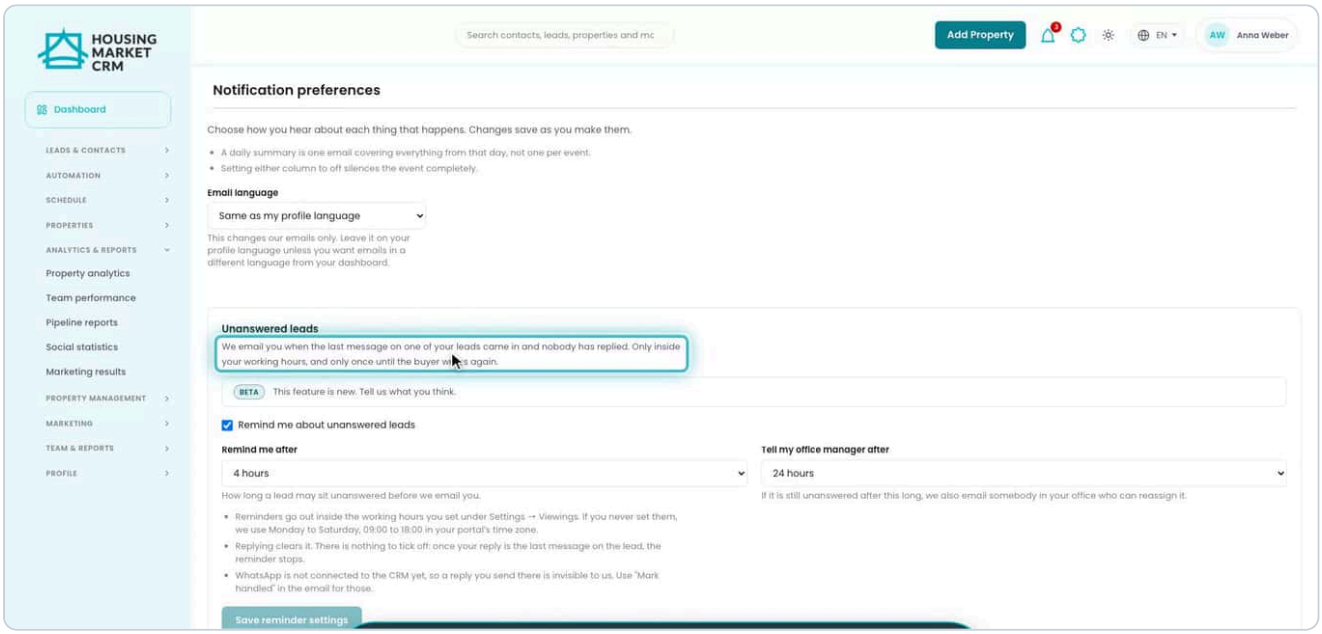


Figure 67.3 · Screen recorded 5 November 2026

4 Keep the reminder **switched on**.

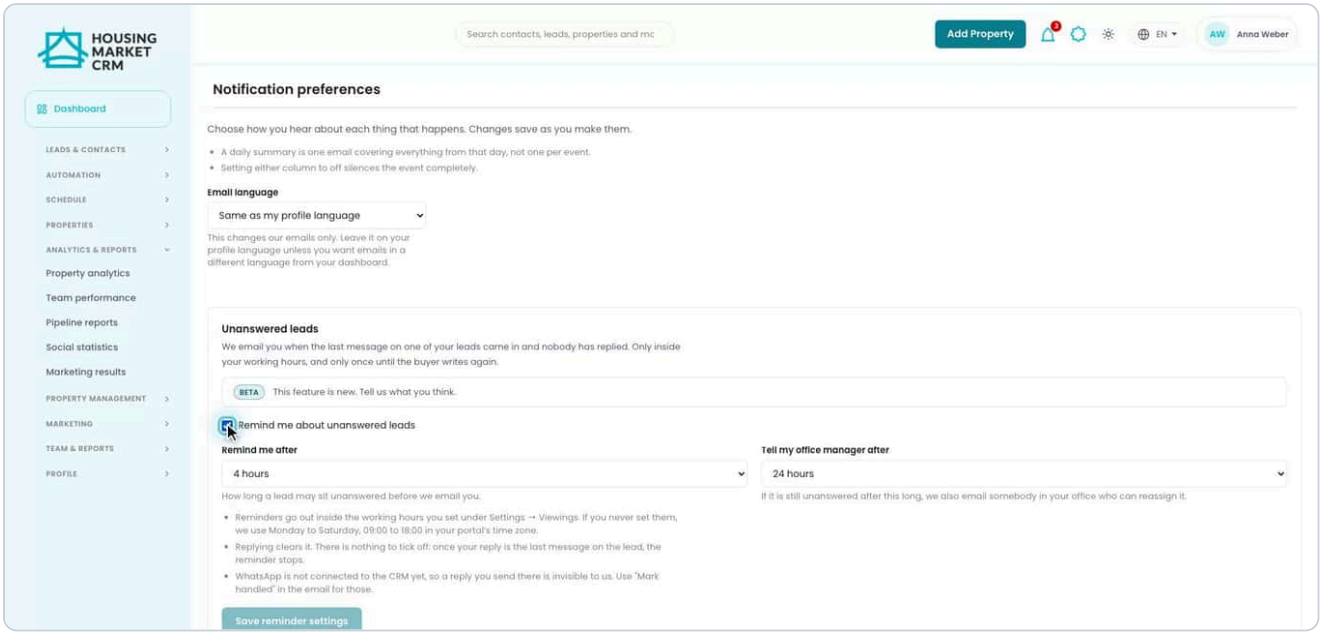


Figure 67.4 · Screen recorded 5 November 2026

5 Choose **how long** a lead may sit unanswered.

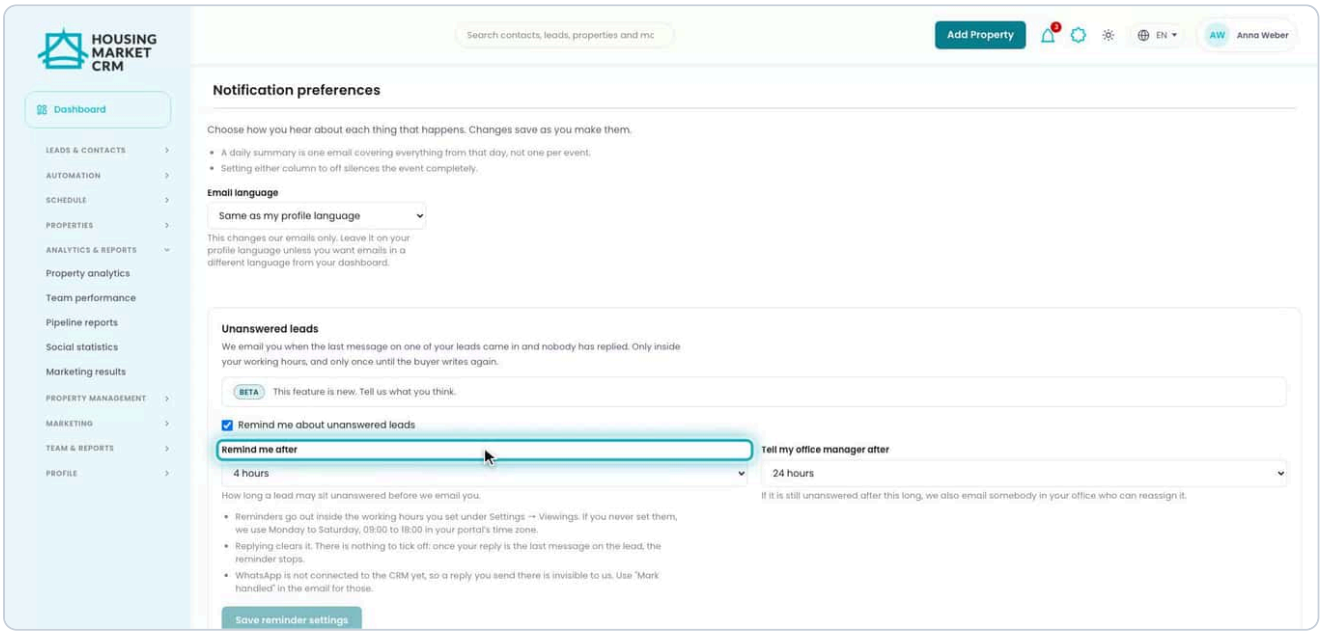


Figure 67.5 · Screen recorded 5 November 2026

6 Pick **2 hours**.

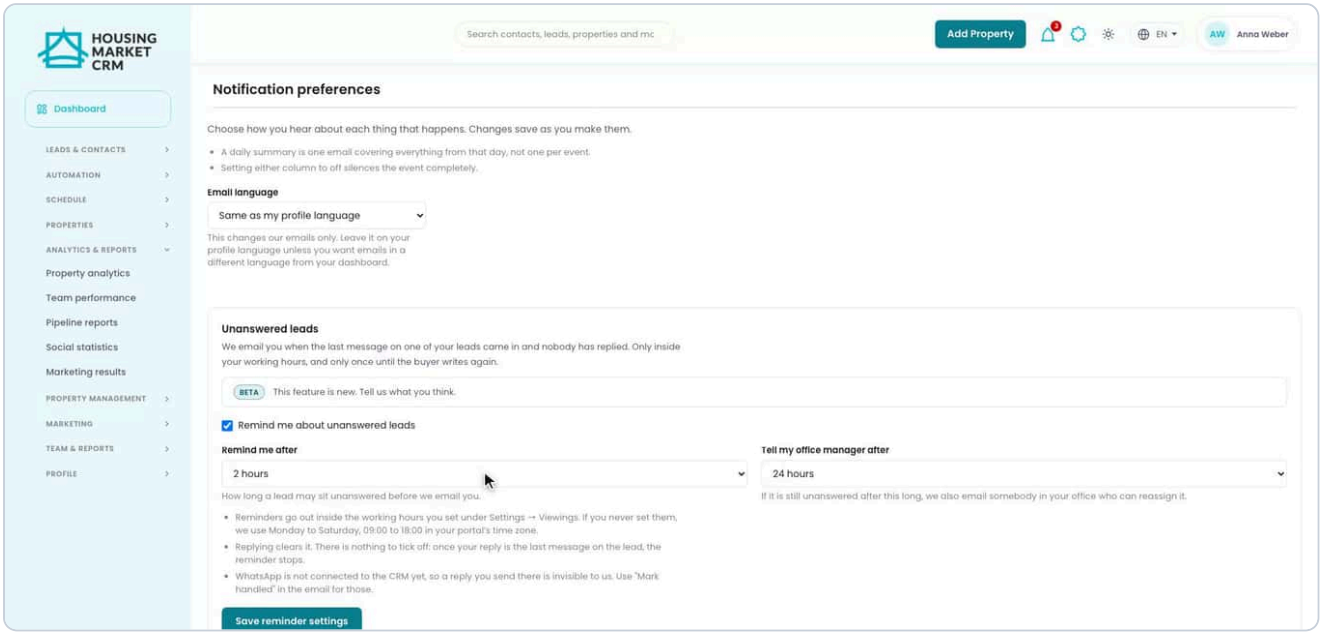


Figure 67.6 · Screen recorded 5 November 2026

7 If it is **still unanswered** later, your office manager is told as well.

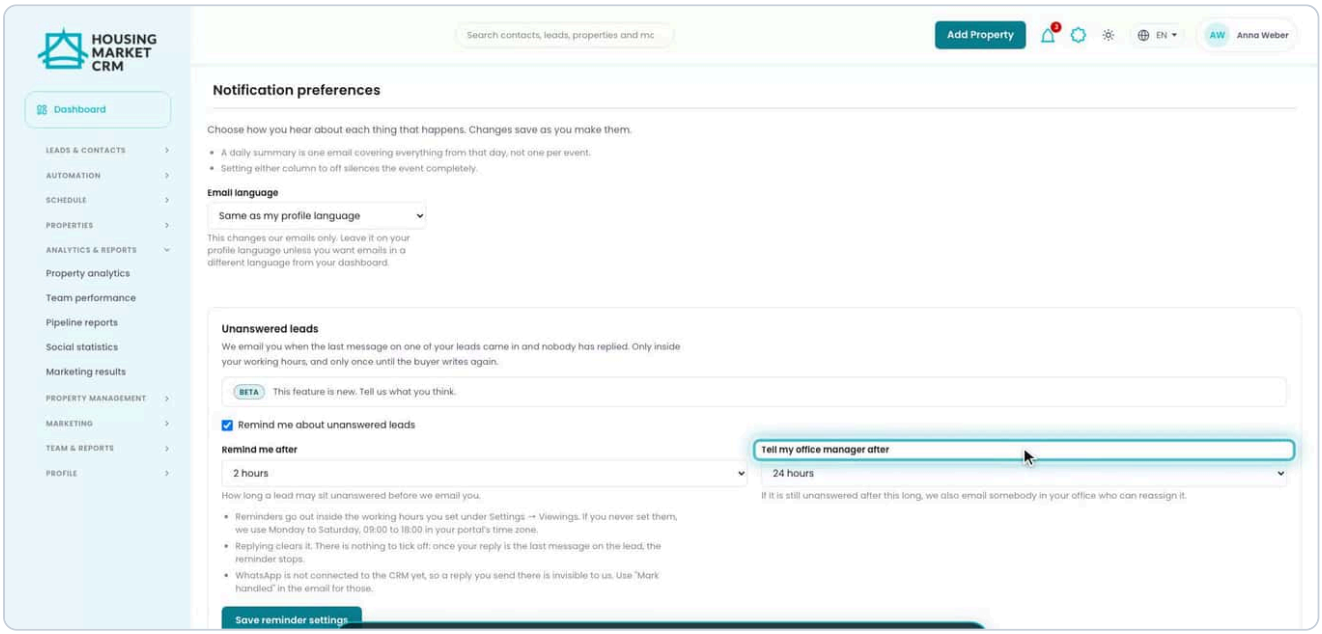


Figure 67.7 · Screen recorded 5 November 2026

8 Select **Save reminder settings**.

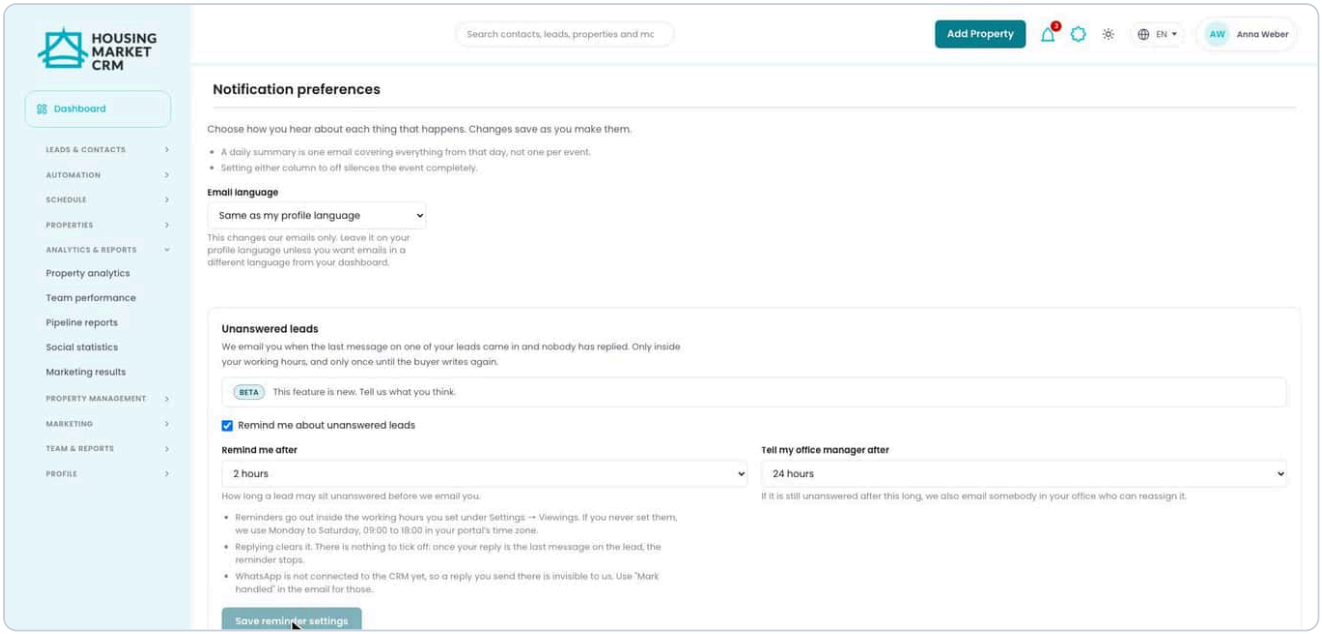


Figure 67.8 · Screen recorded 5 November 2026

9 **Replying** in the CRM clears the reminder.

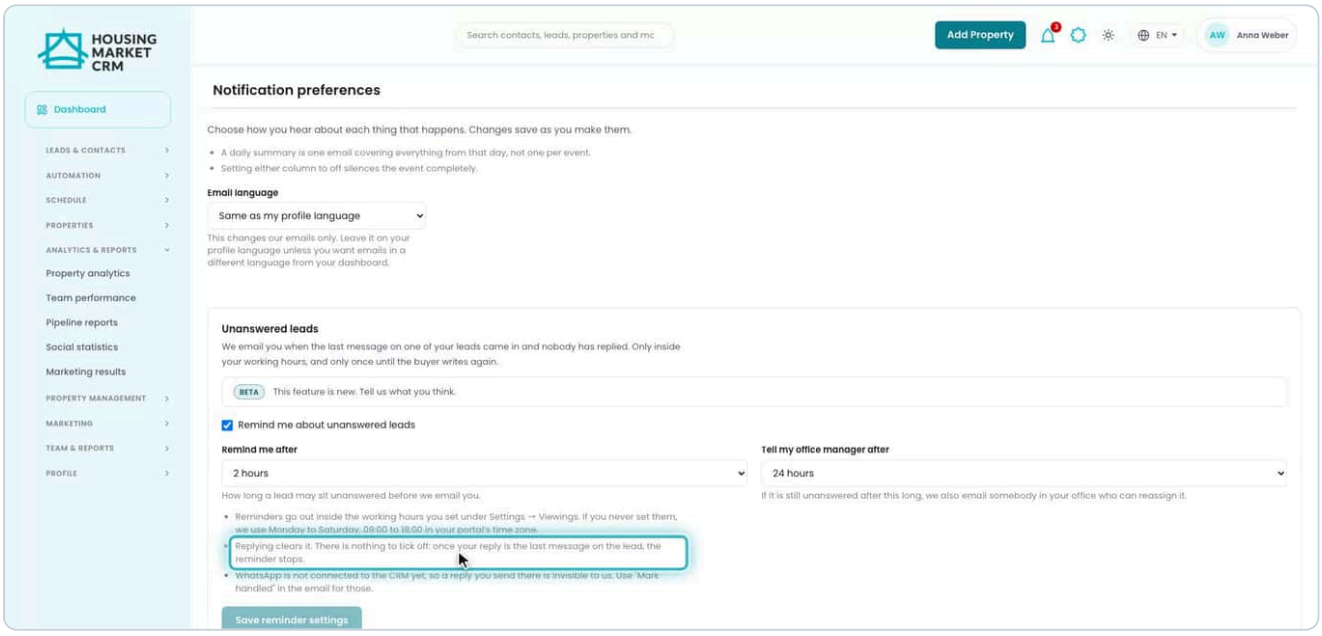


Figure 67.9 · Screen recorded 5 November 2026

10 Replies sent from **WhatsApp** are not seen yet.

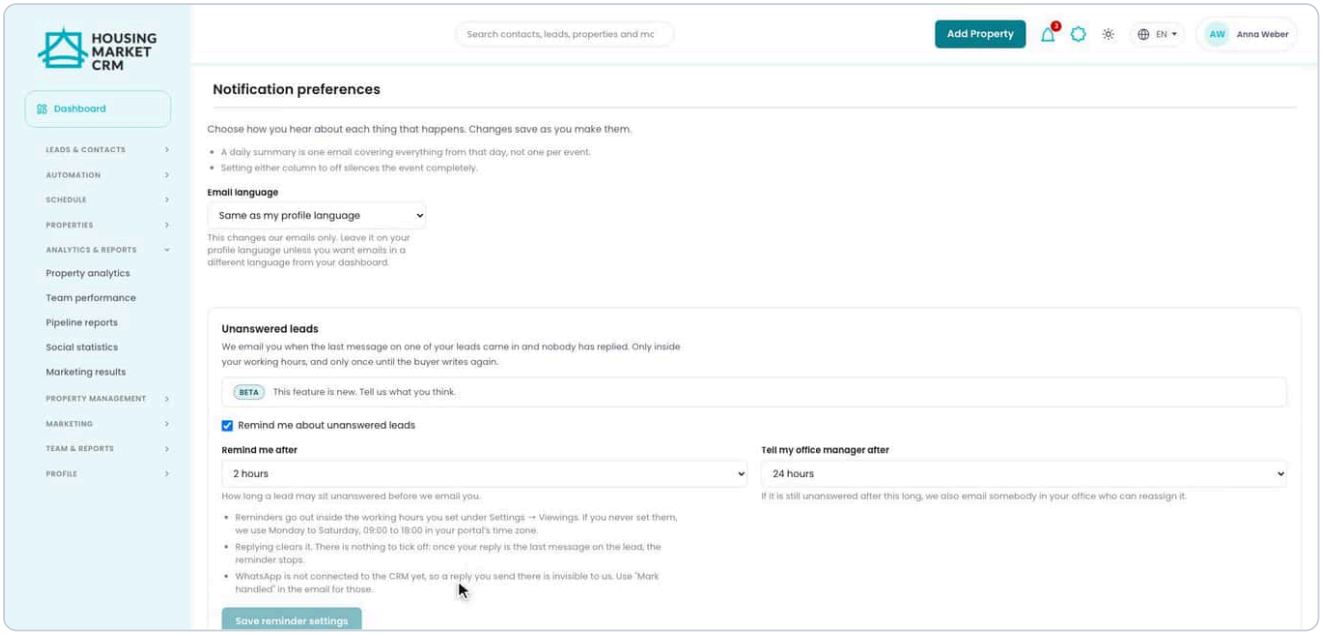


Figure 67.10 · Screen recorded 5 November 2026

RELATED HELP CENTER ARTICLES

Where do I see my notifications in the CRM?	faq.housingmarketgroup.com/faq/where-do-i-see-my-crm-notifications
What can I do on a lead's page?	faq.housingmarketgroup.com/faq/what-can-i-do-on-a-leads-page

68 CHAPTER 68

Choose when your office manager is told about an unanswered lead

All plans | For agents and agencies | Watch the video

OVERVIEW

Yes. When the last message on one of your leads came in and nobody has replied, the CRM emails you after a few hours, inside your working hours. On Business it can also tell your office manager.

The reminder is in Settings, Notifications, in the card Unanswered leads. It is on until you switch it off. Every hour the CRM looks for leads whose most recent message came in from the buyer and has had no reply. When one has waited longer than your first limit, the CRM emails you: the lead's details and two buttons, Snooze until tomorrow and Mark handled. The buttons in the email work for seven days.

When it is sent

- Only inside your working hours. They are the ones you set under Settings, Viewings; if you never set them, the CRM uses Monday to Saturday, 09:00 to 18:00 in your portal's time zone. A reminder that falls outside them waits for the next working hour.
- Once for each message from the buyer: if the buyer writes again and nobody answers, a new reminder can follow.
- Replying clears it. There is nothing to tick off: once your reply is the last message on the lead, the reminder stops.
- By email only. If you set the channel of this notification to the bell only under Settings, Notifications, you switch the reminder off.

Choose the timing

Remind me after is how long a lead may sit unanswered before the CRM emails you: 1, 2, 4, 8 or 24 hours, and 4 hours until you change it. Tell my office manager after is how long it may sit before the CRM also emails someone in your office who can reassign it: 4, 8, 24, 48 or 72 hours, and 24 hours until you change it. Choose Save reminder settings to keep your choice.

Telling the office manager is part of Business. It needs an office in which another person, an admin or a manager, can reassign leads. On any other plan, or in an account with nobody to pass a lead to, that choice does nothing, and the screen says so. To stop the reminders, untick Remind me about unanswered leads and save.

What the CRM cannot see yet

The reminder reads the enquiries and messages the CRM holds, the replies on the portal, the emails the CRM sent and your calls. A reply the buyer sends by email, and any reply sent through WhatsApp, which is not connected to the CRM yet, are not seen, so use Mark handled in the email for those.

From the Help Center: **Does the CRM remind me about a lead I have not answered?**

STEP BY STEP

1 Open **Settings**, then **Notifications**.

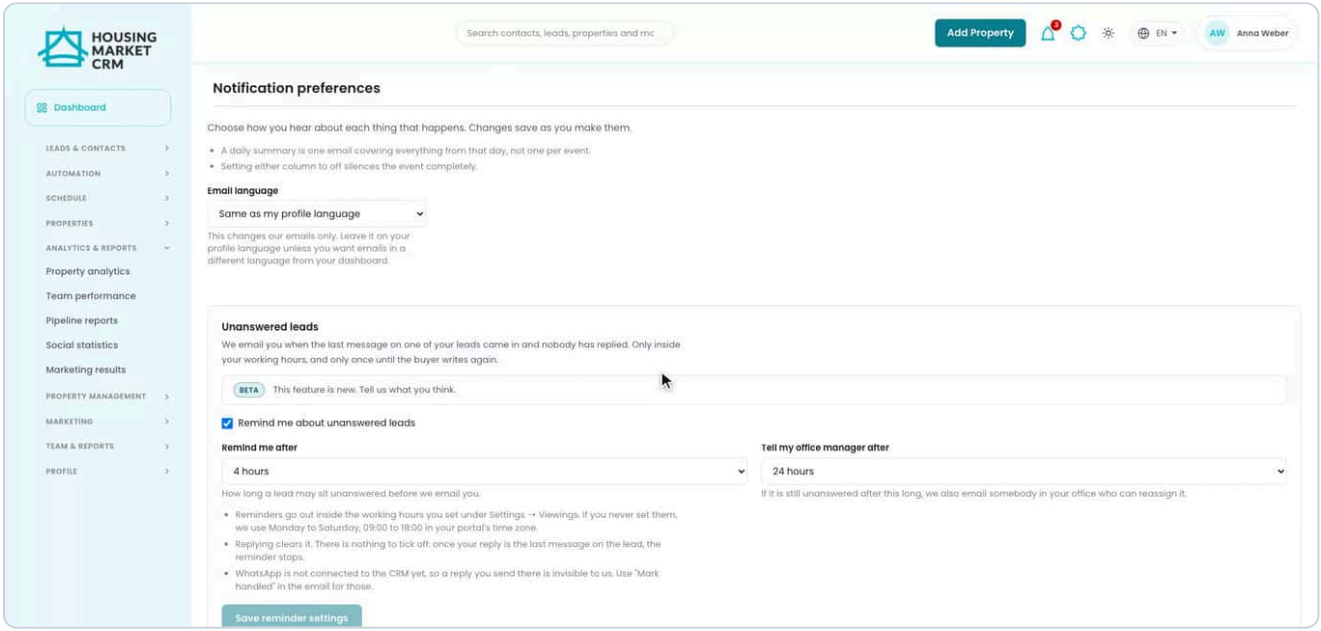


Figure 68.1 · Screen recorded 5 November 2026

2 Find the **Unanswered leads** card.

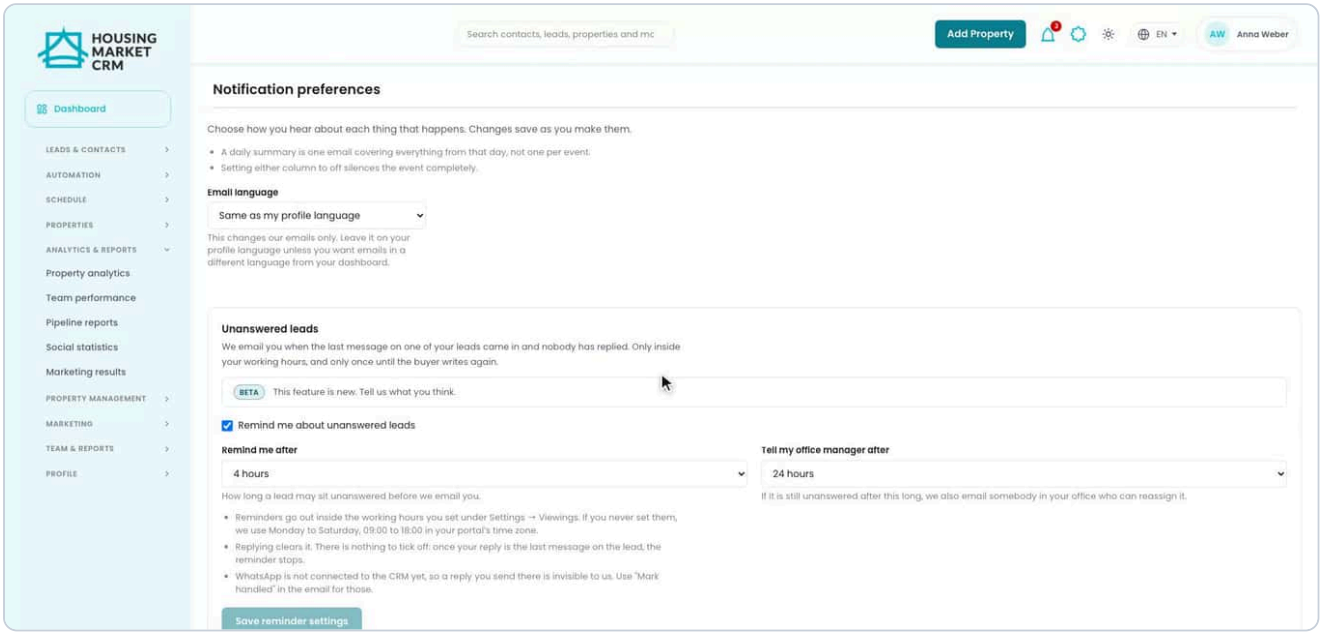


Figure 68.2 · Screen recorded 5 November 2026

3 If a lead is **still unanswered** later, your office manager is told as well.

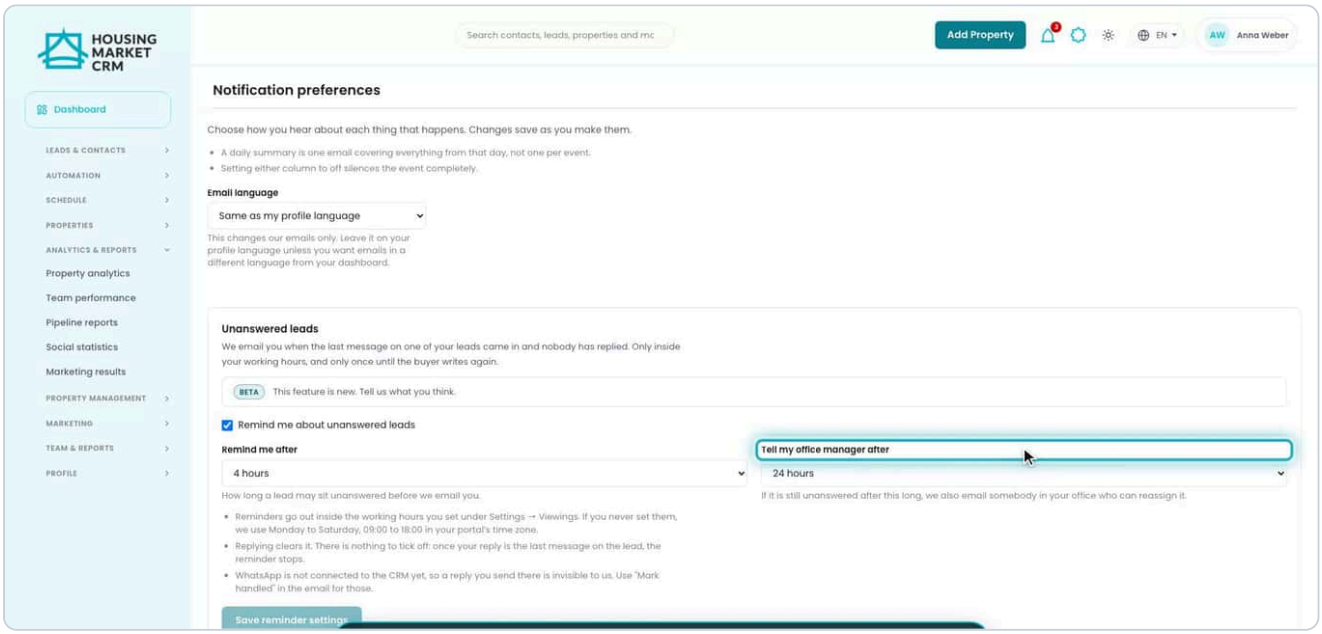


Figure 68.3 · Screen recorded 5 November 2026

4 Choose how long: for example **48 hours**.

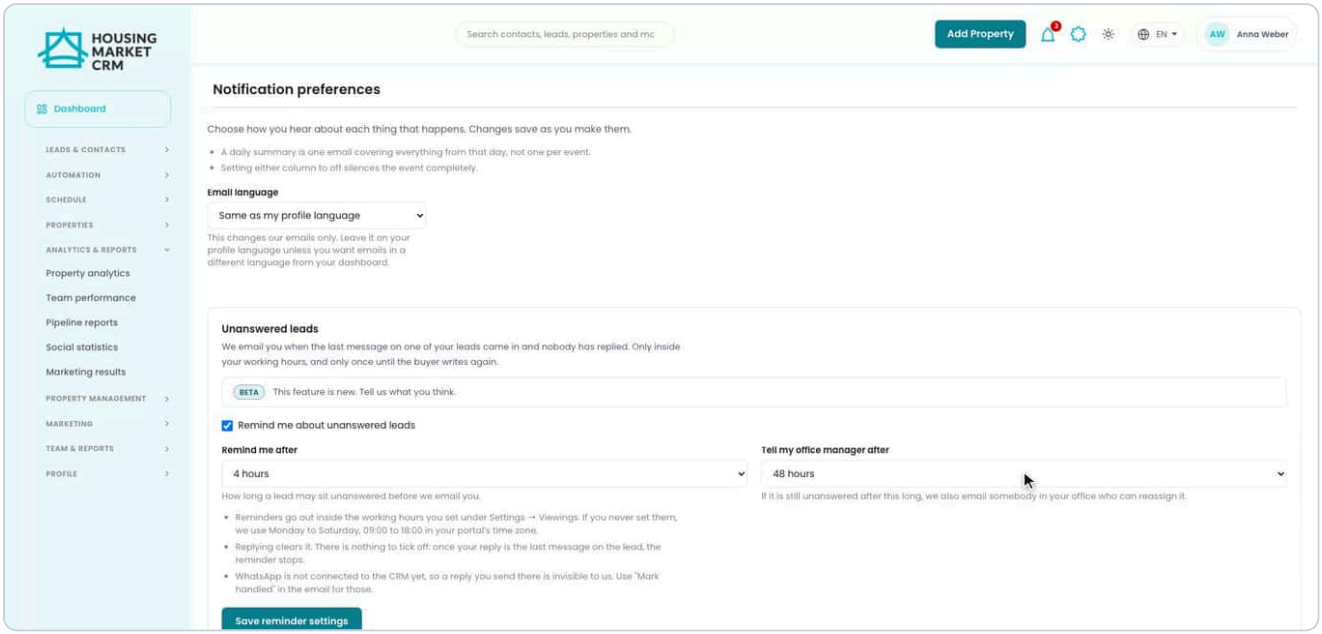


Figure 68.4 · Screen recorded 5 November 2026

5 Select **Save reminder settings**.

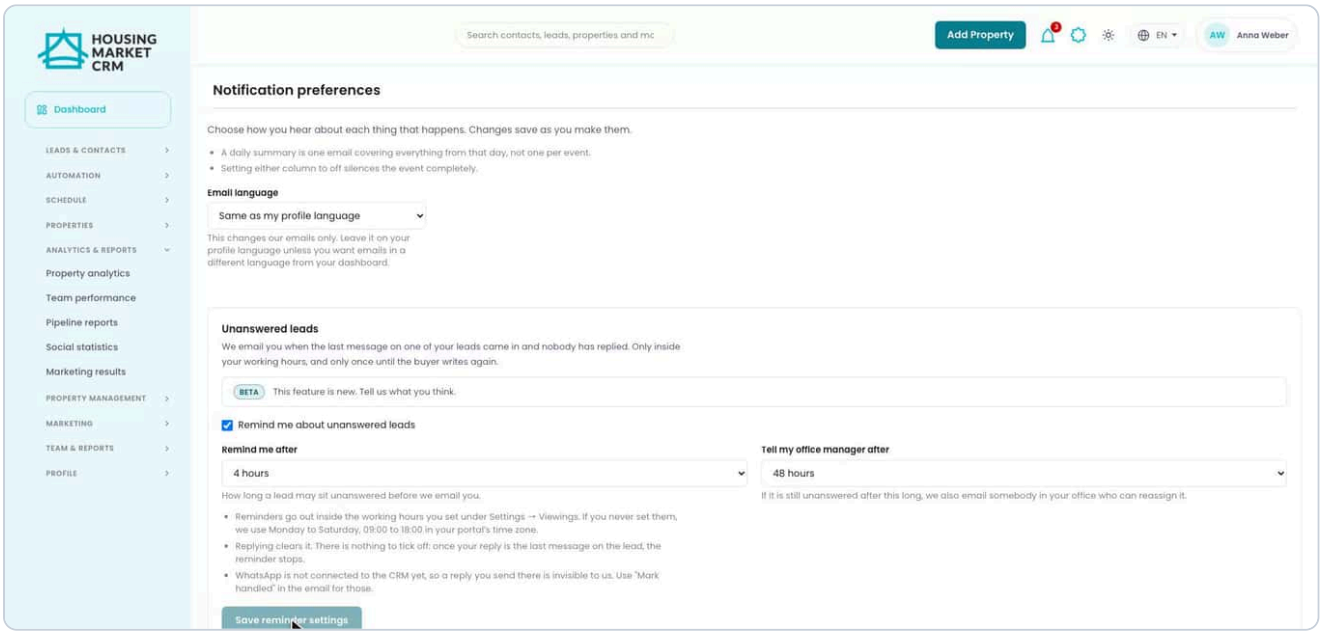


Figure 68.5 · Screen recorded 5 November 2026

6 **Replying** in the CRM clears the reminder.

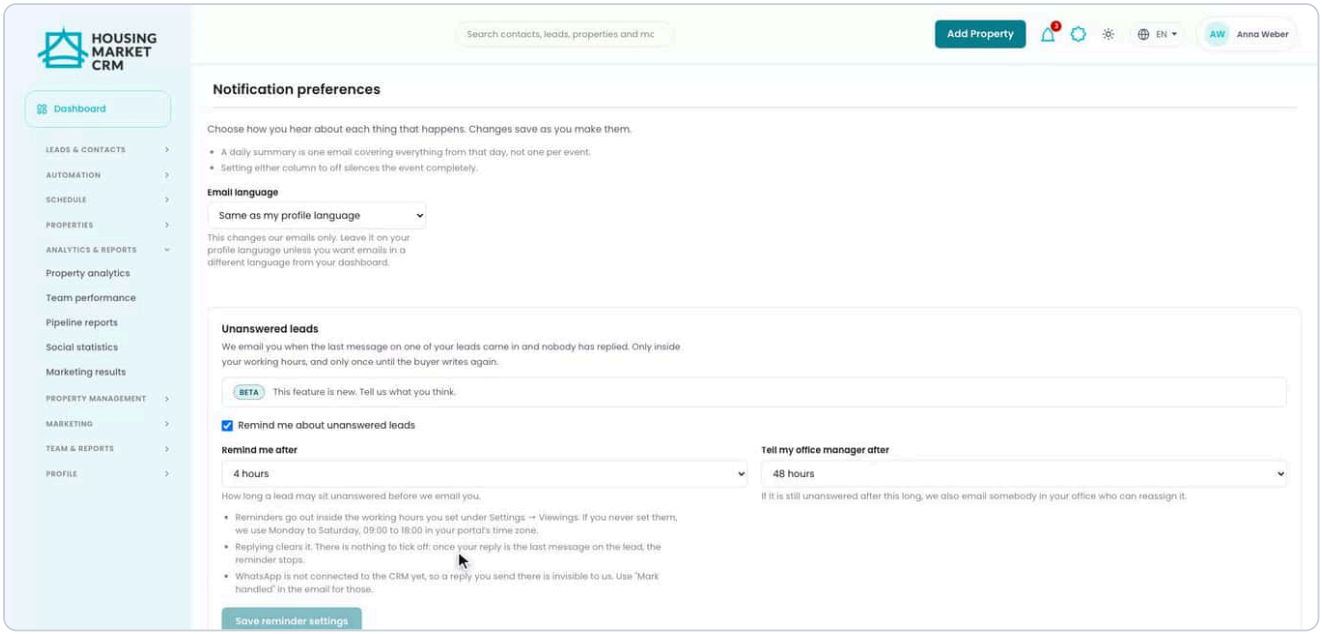


Figure 68.6 · Screen recorded 5 November 2026

RELATED HELP CENTER ARTICLES

Where do I see my notifications in the CRM?	faq.housingmarketgroup.com/faq/where-do-i-see-my-crm-notifications

69 CHAPTER 69

Switch off the unanswered lead reminder

All plans | For agents and agencies | Watch the video

OVERVIEW

Yes. When the last message on one of your leads came in and nobody has replied, the CRM emails you after a few hours, inside your working hours. On Business it can also tell your office manager.

The reminder is in Settings, Notifications, in the card Unanswered leads. It is on until you switch it off. Every hour the CRM looks for leads whose most recent message came in from the buyer and has had no reply. When one has waited longer than your first limit, the CRM emails you: the lead's details and two buttons, Snooze until tomorrow and Mark handled. The buttons in the email work for seven days.

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- Replying clears it. There is nothing to tick off: once your reply is the last message on the lead, the reminder stops.
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From the Help Center: **Does the CRM remind me about a lead I have not answered?**

STEP BY STEP

1 Open **Settings**, then **Notifications**.

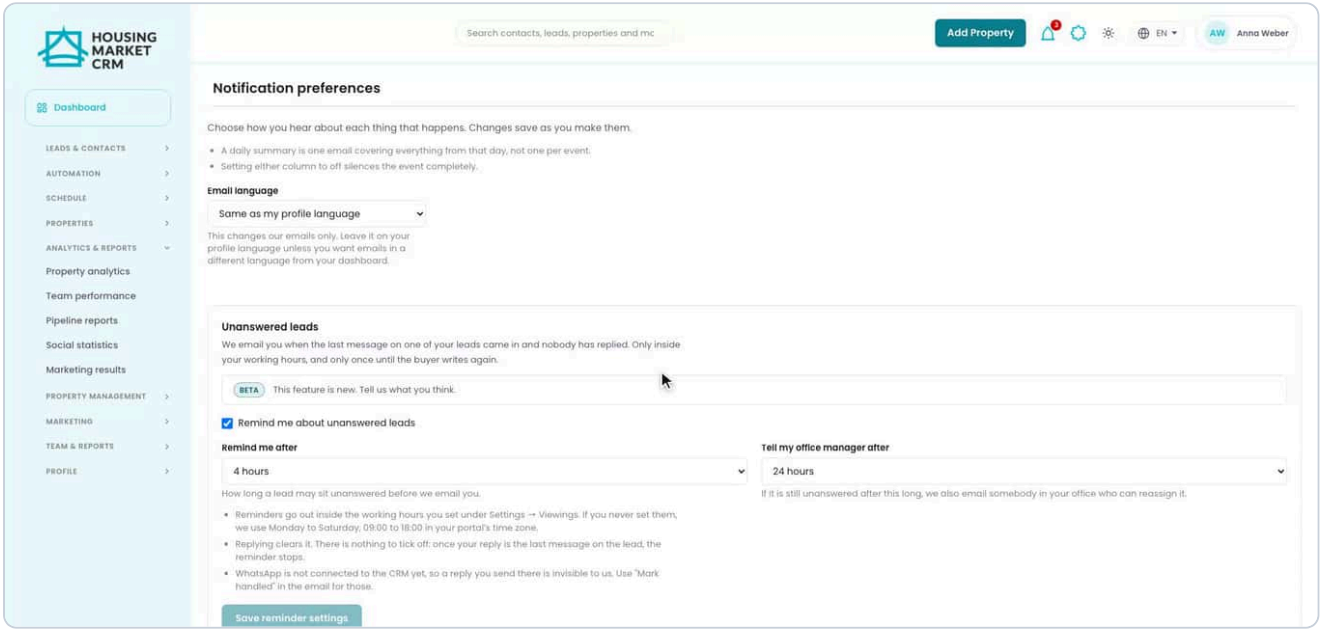


Figure 69.1 · Screen recorded 5 November 2026

2 Find the **Unanswered leads** card.

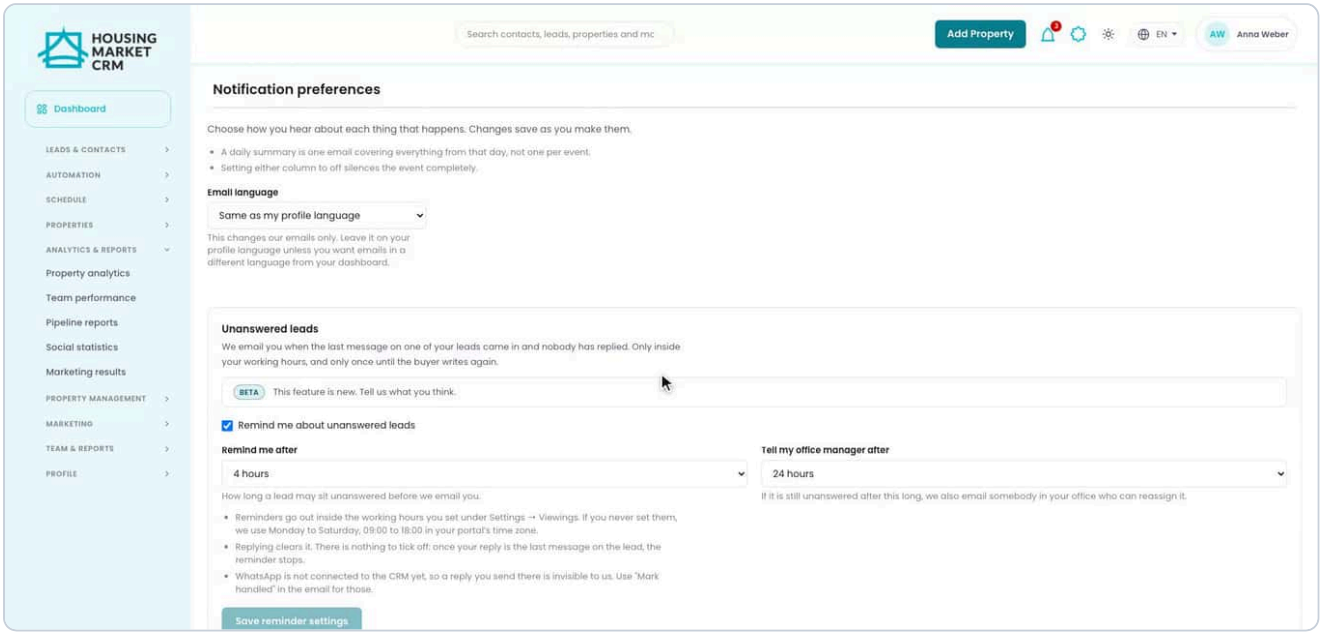


Figure 69.2 · Screen recorded 5 November 2026

3 The reminder is **on** by default.

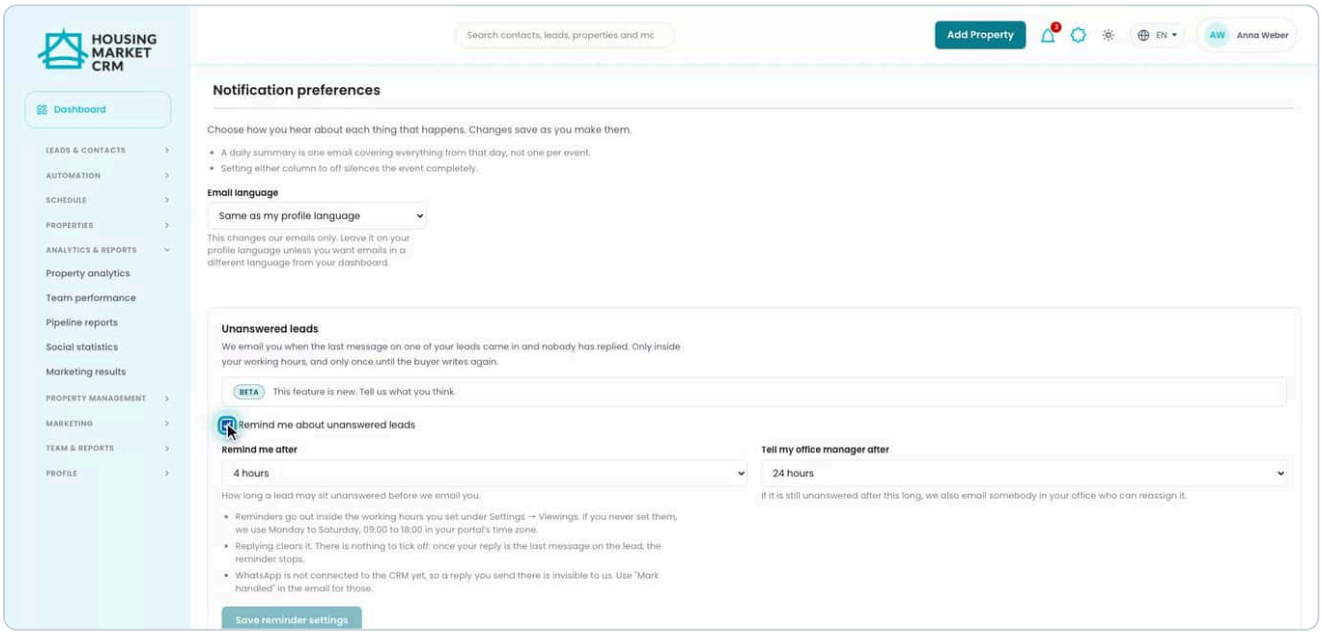


Figure 69.3 · Screen recorded 5 November 2026

4 **Untick** it to switch the reminder off.

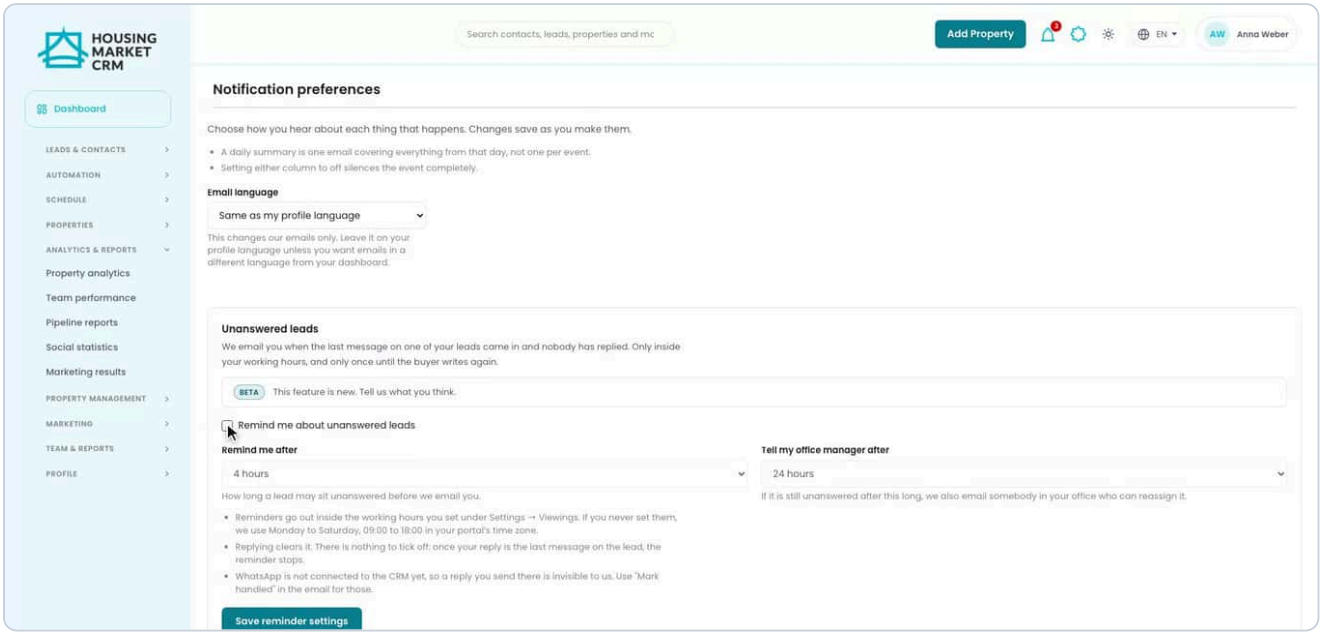


Figure 69.4 · Screen recorded 5 November 2026

5 Select **Save reminder settings**.

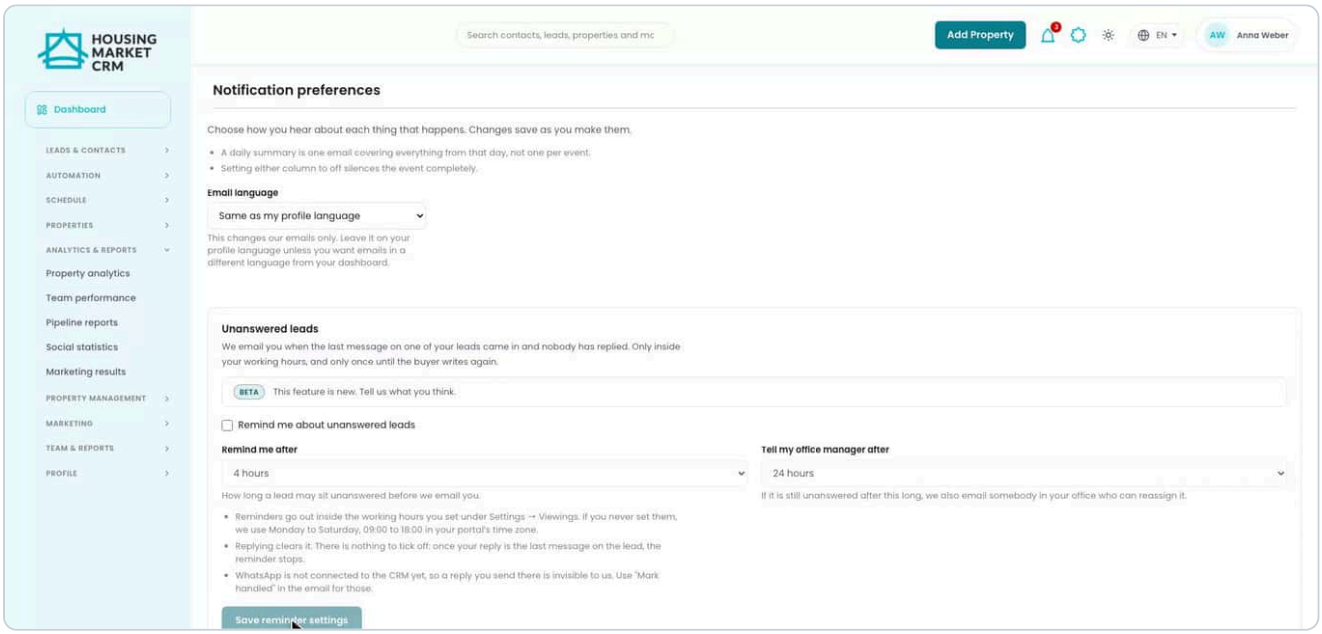


Figure 69.5 · Screen recorded 5 November 2026

6 You can **switch it on again** at any time.

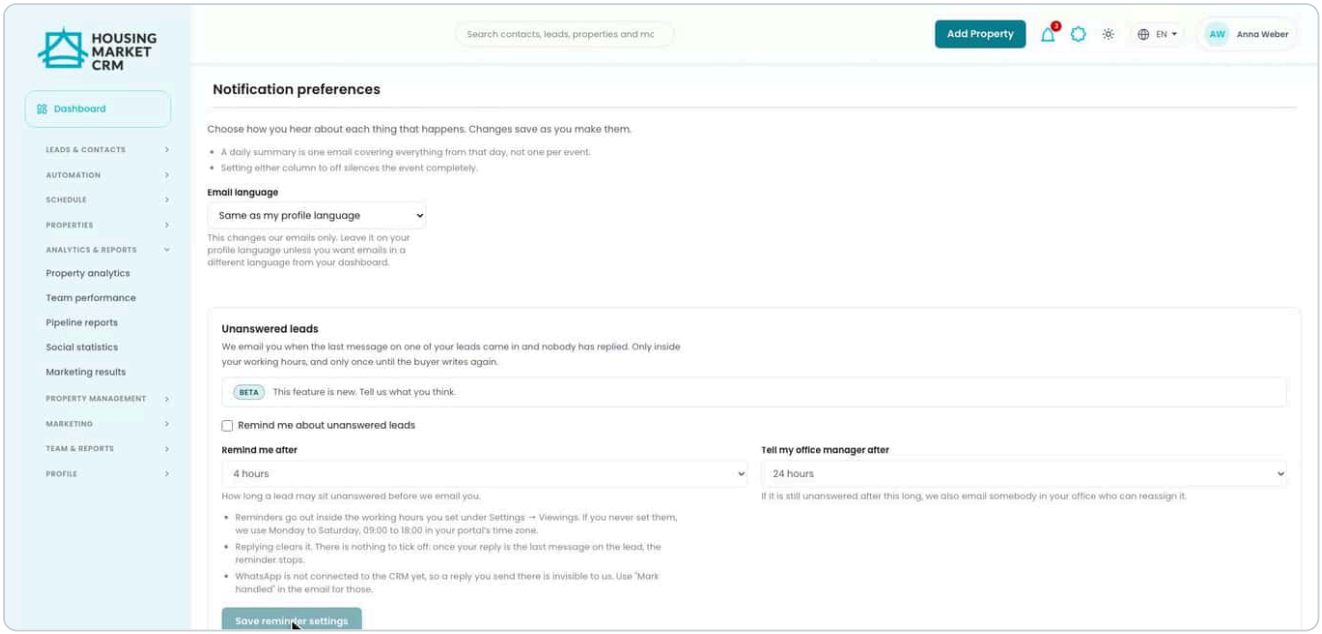


Figure 69.6 · Screen recorded 5 November 2026

RELATED HELP CENTER ARTICLES

Where do I see my notifications in the CRM?	faq.housingmarketgroup.com/faq/where-do-i-see-my-crm-notifications

70 CHAPTER 70

Remove a manual entry from the suppression list

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

On Pro, choose Marketing: upload your mailing list with consent recorded, build a campaign around your listings, send yourself a test, then send it now or schedule it.

Email campaigns are part of Pro. Choose Marketing in the left menu. The tabs Contacts, Campaigns and Suppressions are always there, and further tabs, such as Segments, Triggers, Launch kit and Results, appear when those Pro tools are open on your account. On Free the page explains the tool and offers Pro instead.

Your mailing list

The Contacts tab is your mailing list and shows who on it can be emailed. To add people, upload a contact list — a CSV, TSV or semicolon-separated file; save an Excel workbook as CSV first — and confirm which column is the email address, first name, last name and phone before anything is saved.

Tick These people agreed to hear from me and say where they agreed, such as a sign-up form or a viewing sheet. Only contacts with consent are ever emailed: without it they are saved but never sent a campaign, and you can record consent later.

Building a campaign

- Open the Campaigns tab and choose New campaign.
- Give it a name, which only you see, and a subject line, which is what the recipient sees in their inbox. Preview text and an opening message are optional.
- Choose Add a listing to feature your properties. Each card is read from the portal rather than from a saved copy, so it shows the listing as it currently is.
- Choose Save the campaign. Open it to see the preview, and choose Send myself a test to see it in your own inbox; a test is not counted in the results.

Sending it

Under Send this campaign, choose Send now, or set a time and choose Schedule it. Before you send, the screen shows how many people can be emailed and how many cannot, and why: no consent, unsubscribed, or suppressed. A scheduled campaign can be edited or cancelled until it starts sending; cancelling makes it a draft again.

Campaigns are sent from Housing Market Group's own verified address with your name on them, so there is no domain or DNS set-up on your side. Every email carries an unsubscribe link, and Results shows how many were sent, opened, clicked, bounced, marked as spam, failed or suppressed.

Suppressions

Suppressions lists the addresses nobody may email: addresses that do not exist, that marked a campaign as spam, or that unsubscribed, and any you added by hand. The list is shared across the whole platform, because everyone sends from one verified address. To add an address for someone who asked not to be emailed, choose Add an address, type it and, if you like, why. You confirm that it applies to every agent, not only to you: nobody on the platform can email it from then on, including campaigns already scheduled.

You can take back an address you added by hand: choose Remove next to it and confirm. You can remove an address you added, and so can a manager in your office. An address someone else added shows Added by someone else instead of a button, and an address that has since bounced, been marked as spam or unsubscribed stays on the list. Addresses that do not exist, that marked a campaign as spam or that unsubscribed cannot be taken off the list from the CRM, because they are the decision of the mail server or of the person, and writing to them again is what produces the next complaint.

From the Help Center: **How do I send an email campaign to my contacts?**

STEP BY STEP

1. Open your **Housing Market CRM** account.

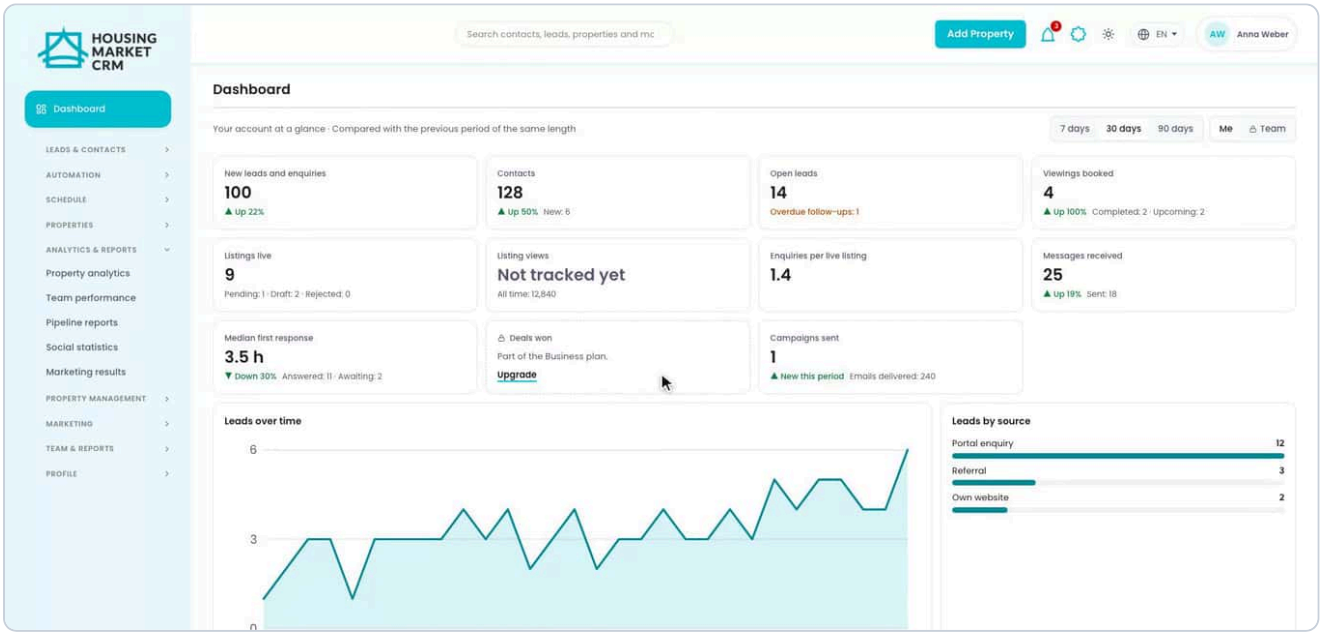


Figure 70.1 · Screen recorded 4 November 2026

2 Open **Marketing** in the left menu.

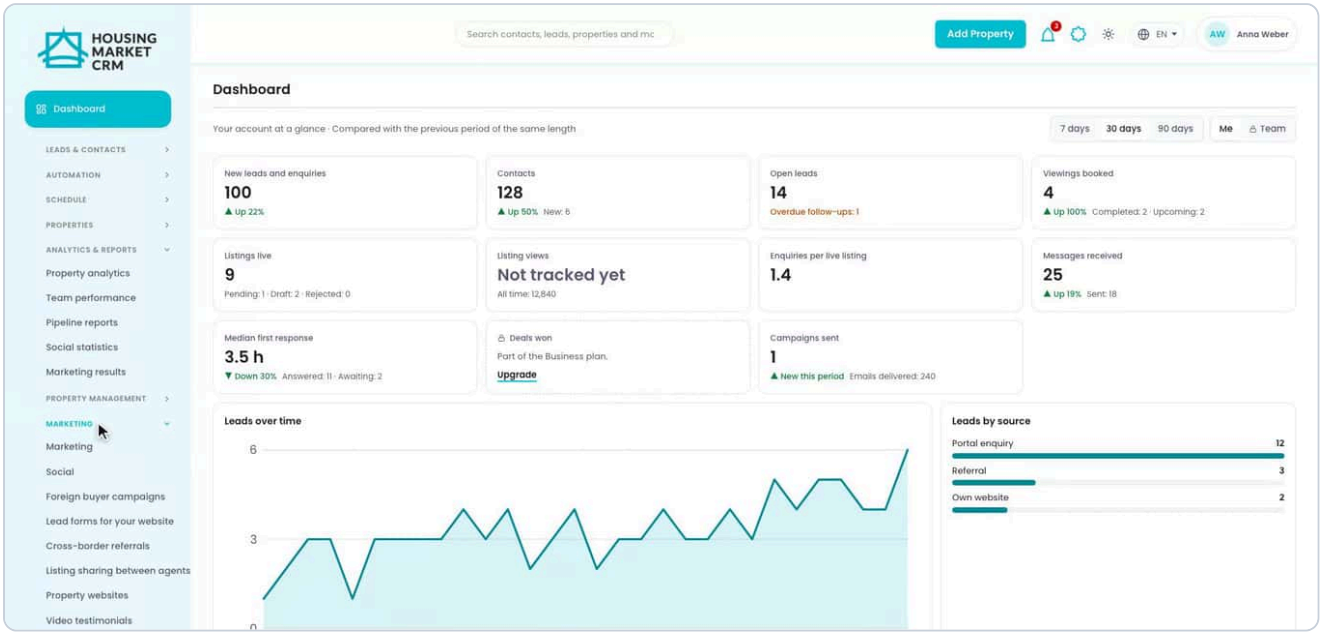


Figure 70.2 · Screen recorded 4 November 2026

3 Click **Marketing**.

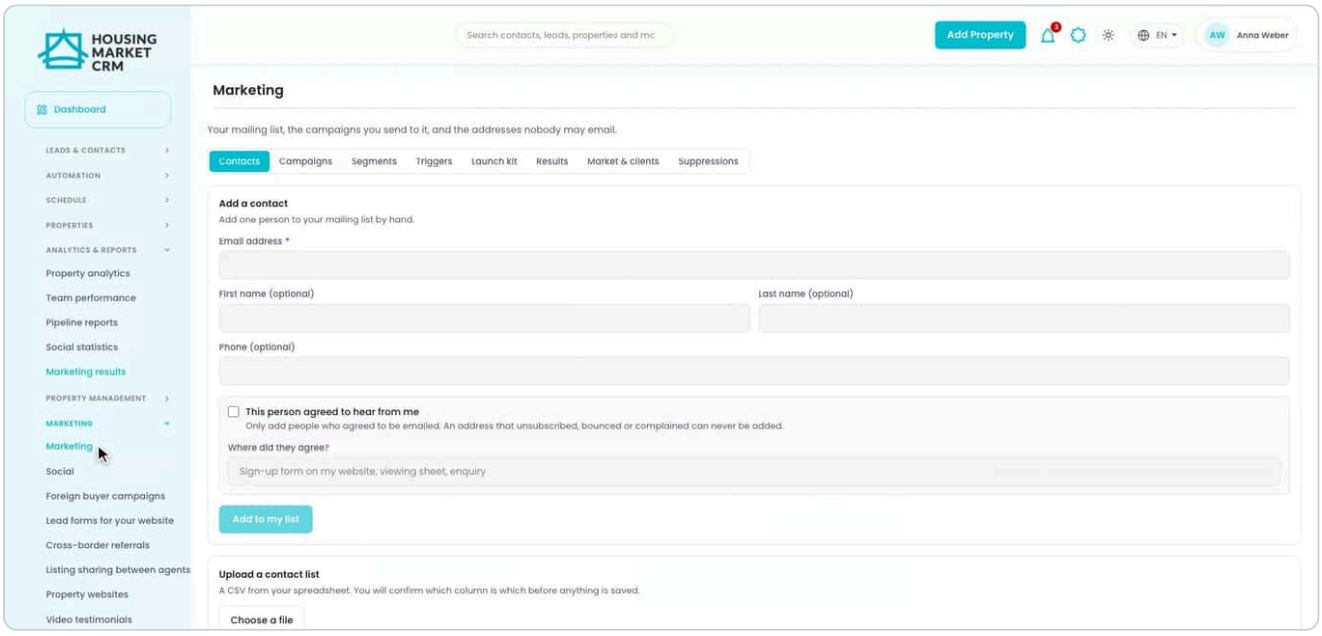


Figure 70.3 · Screen recorded 4 November 2026

4 Open the **Suppressions** tab.

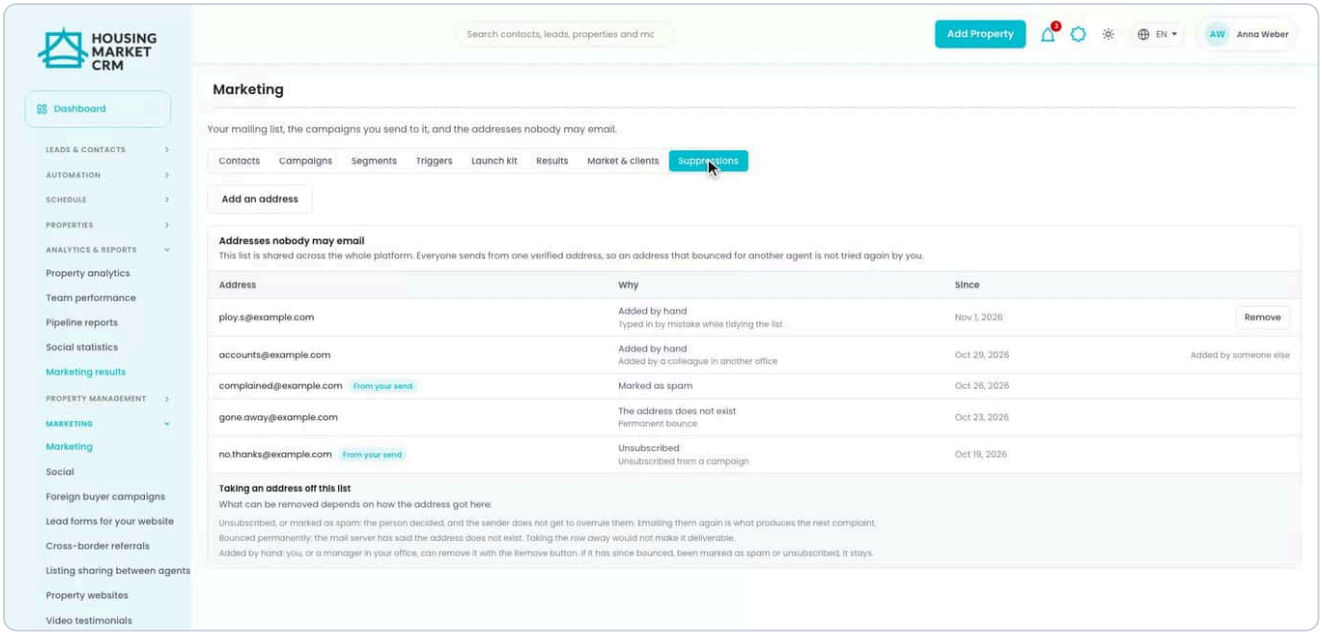


Figure 70.4 · Screen recorded 4 November 2026

5 These are the **addresses nobody may email**.

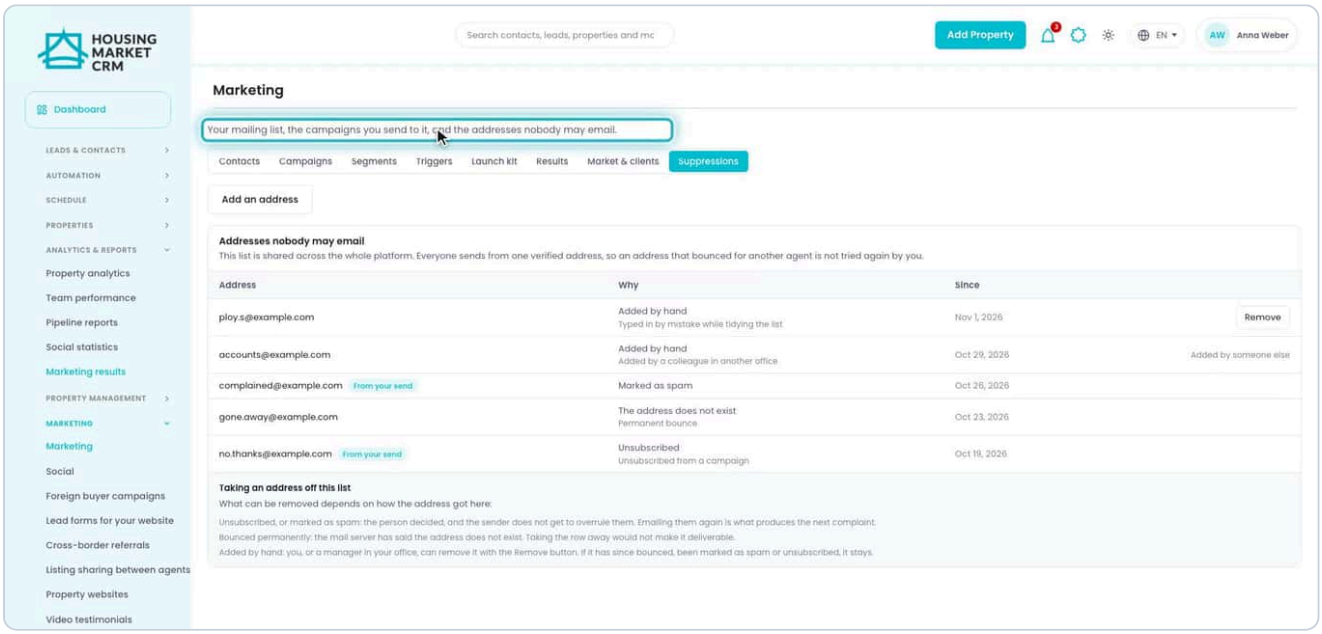


Figure 70.5 · Screen recorded 4 November 2026

6 A **spam complaint**: the person decided, so there is **no Remove button**.

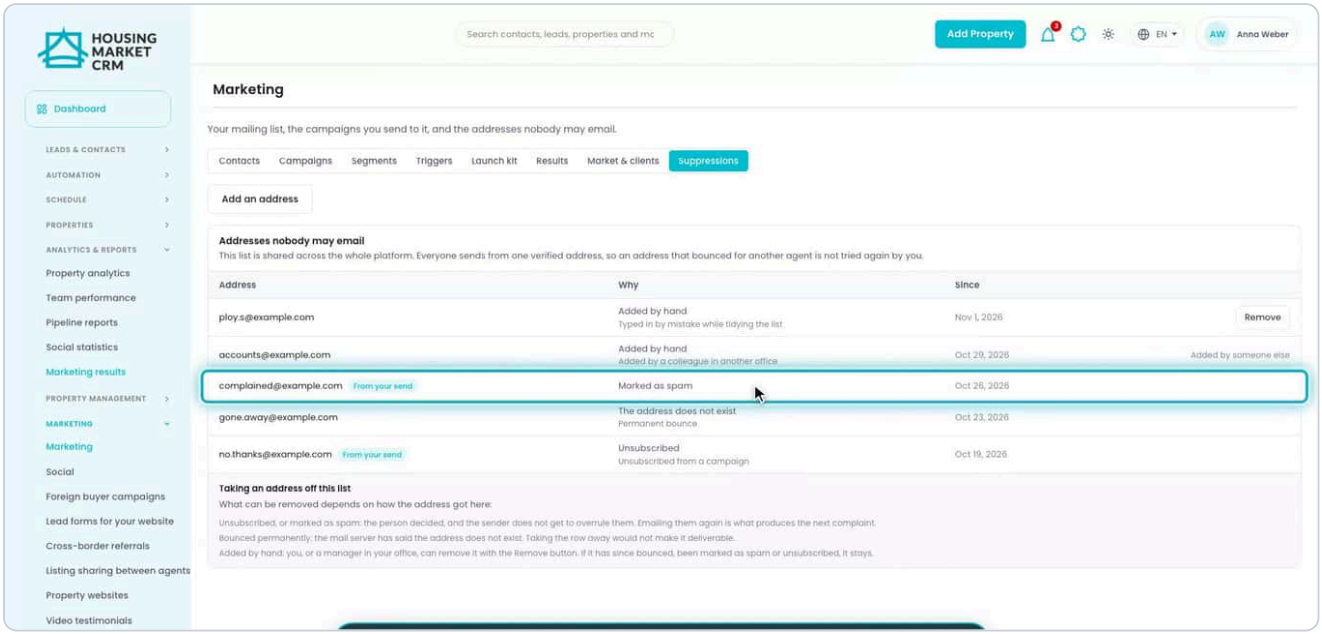


Figure 70.6 · Screen recorded 4 November 2026

7 A **bounce** and an **unsubscribe** have none either.

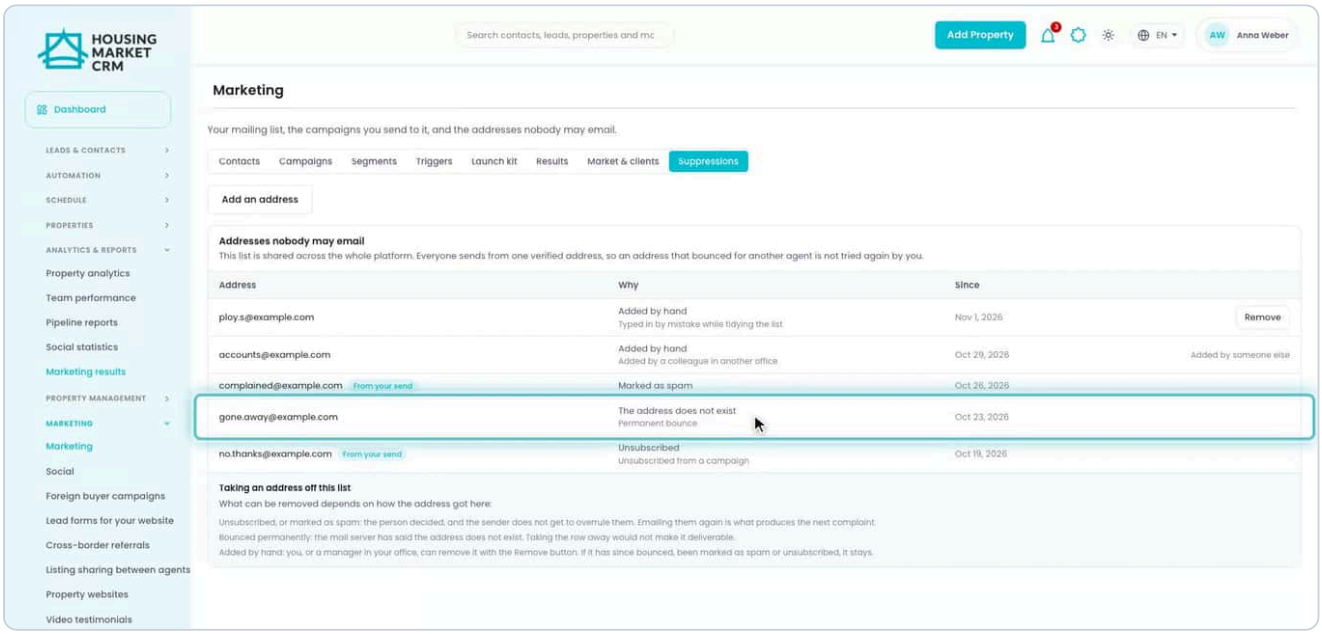


Figure 70.7 · Screen recorded 4 November 2026

8 An address **someone else** added says so.

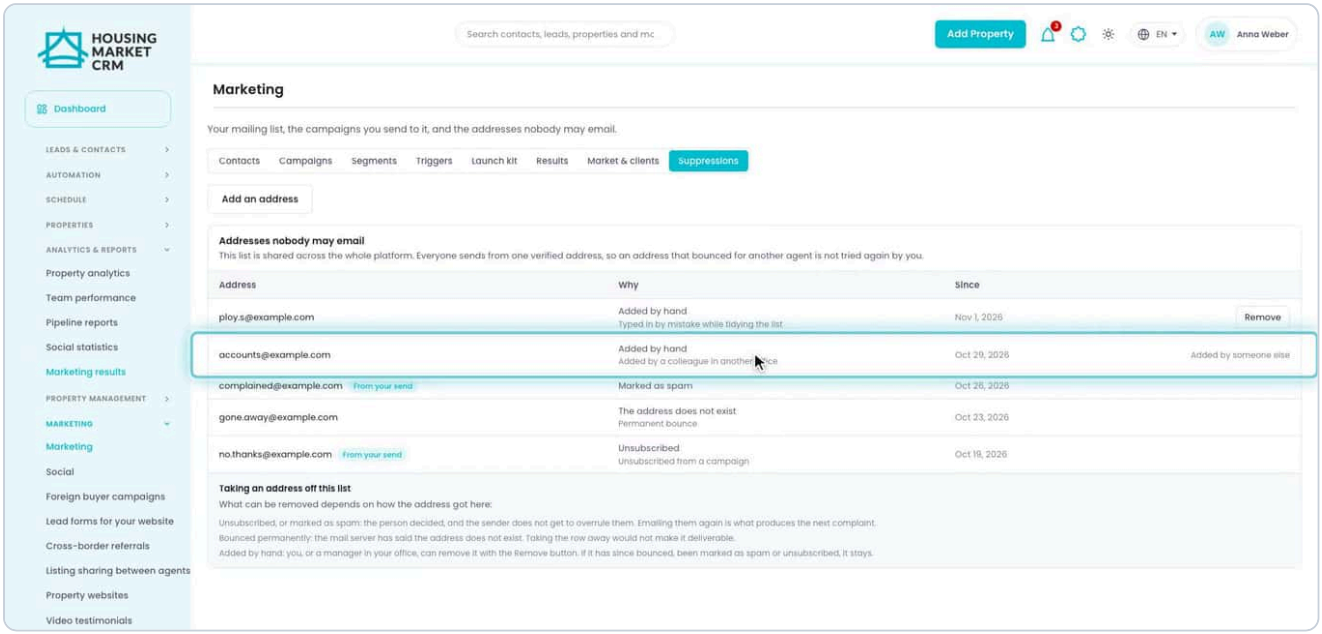


Figure 70.8 · Screen recorded 4 November 2026

9 An address **you added by hand** has a **Remove** button.

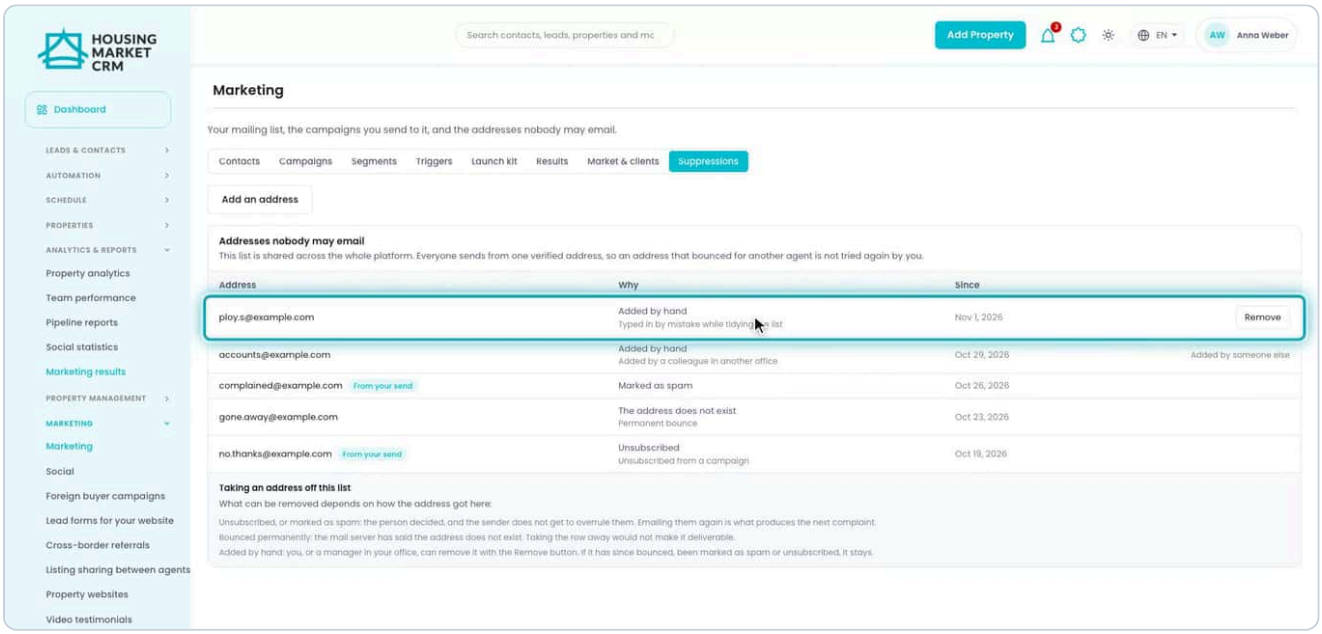


Figure 70.9 · Screen recorded 4 November 2026

10 Click **Remove**.

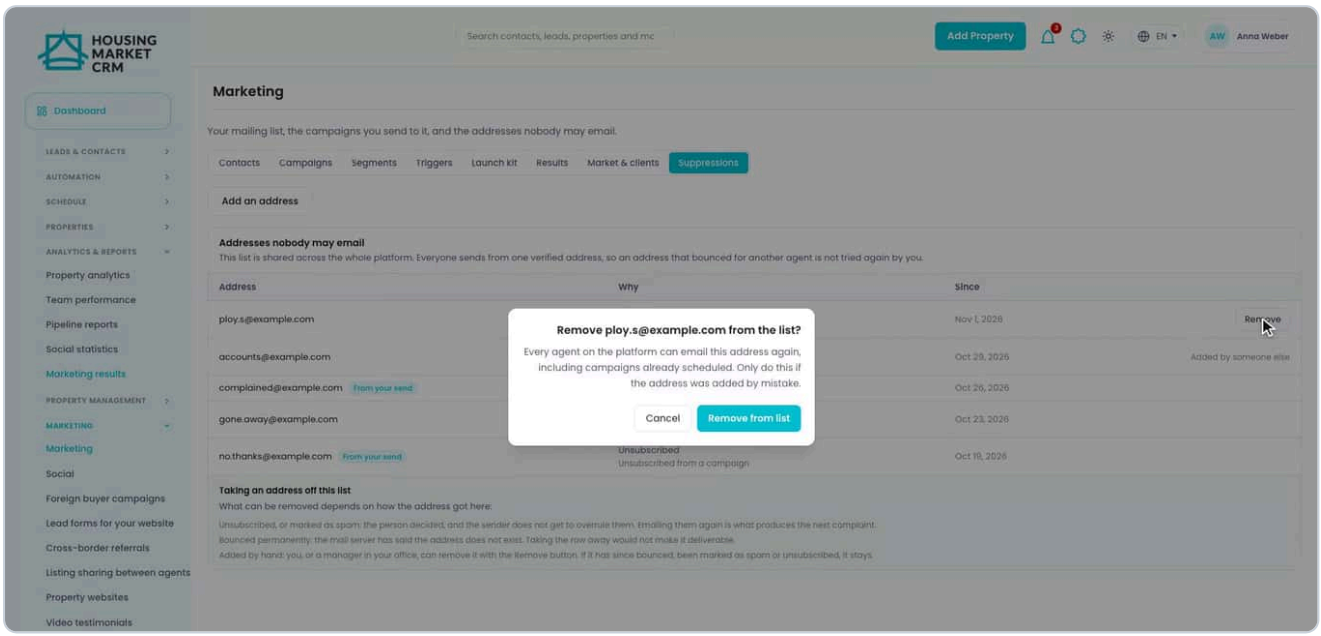


Figure 70.10 · Screen recorded 4 November 2026

11 Read the question: the address can be **emailed again** by every agent.

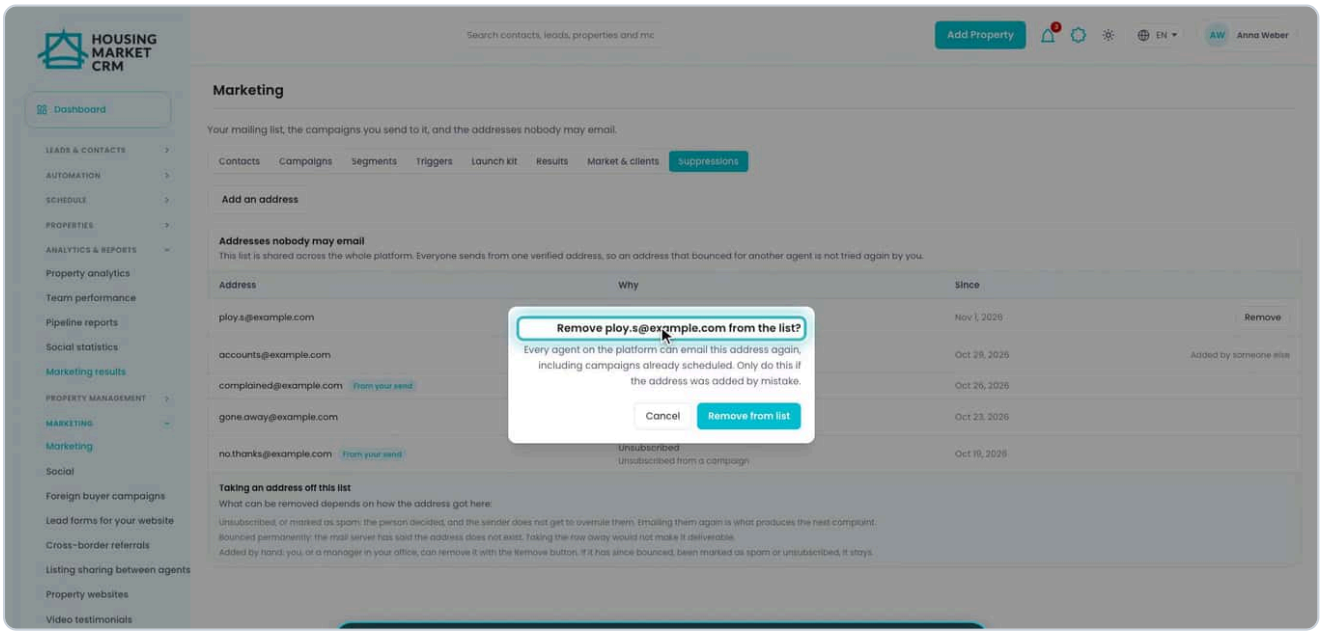


Figure 70.11 · Screen recorded 4 November 2026

12 It opens on **Cancel**, so a stray click removes nothing.

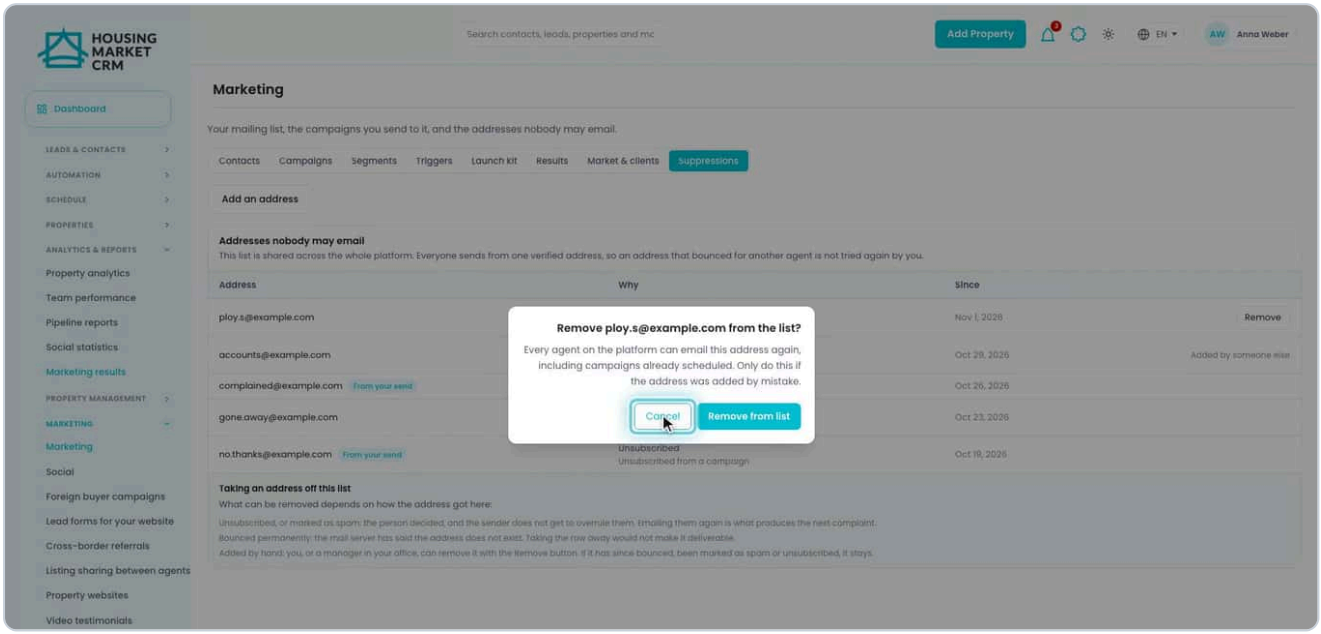


Figure 70.12 · Screen recorded 4 November 2026

13 Click **Remove from list**.

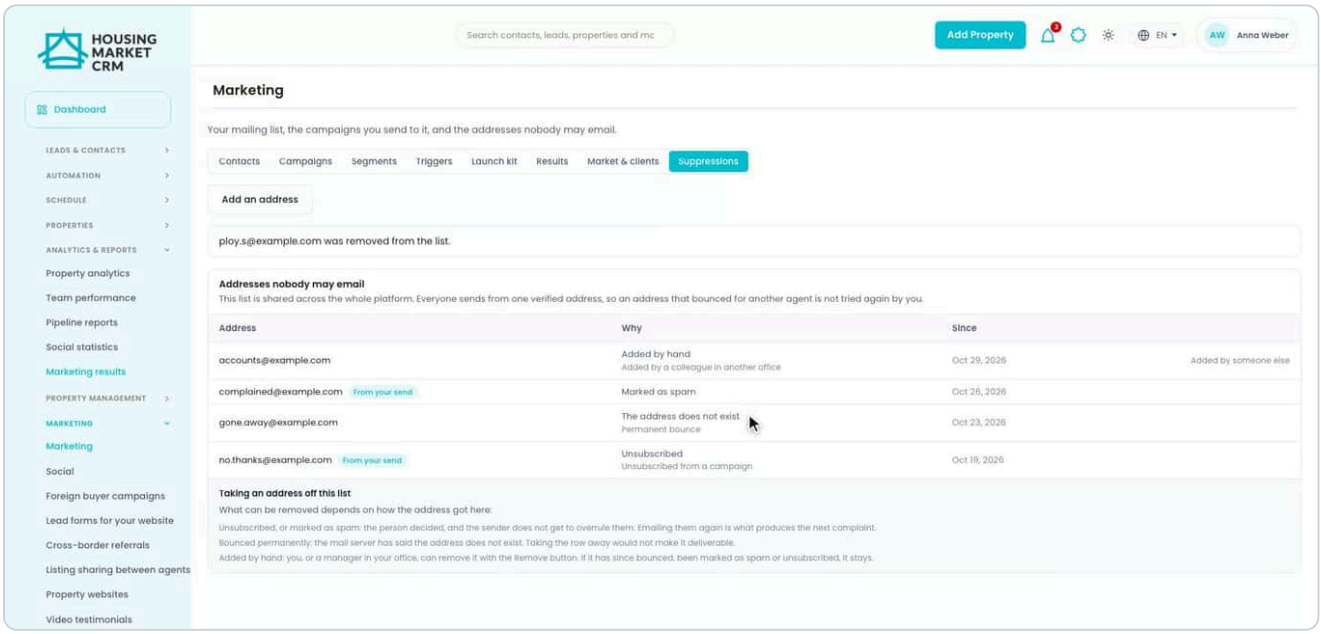


Figure 70.13 · Screen recorded 4 November 2026

14 The list confirms it, and the row is **gone**.

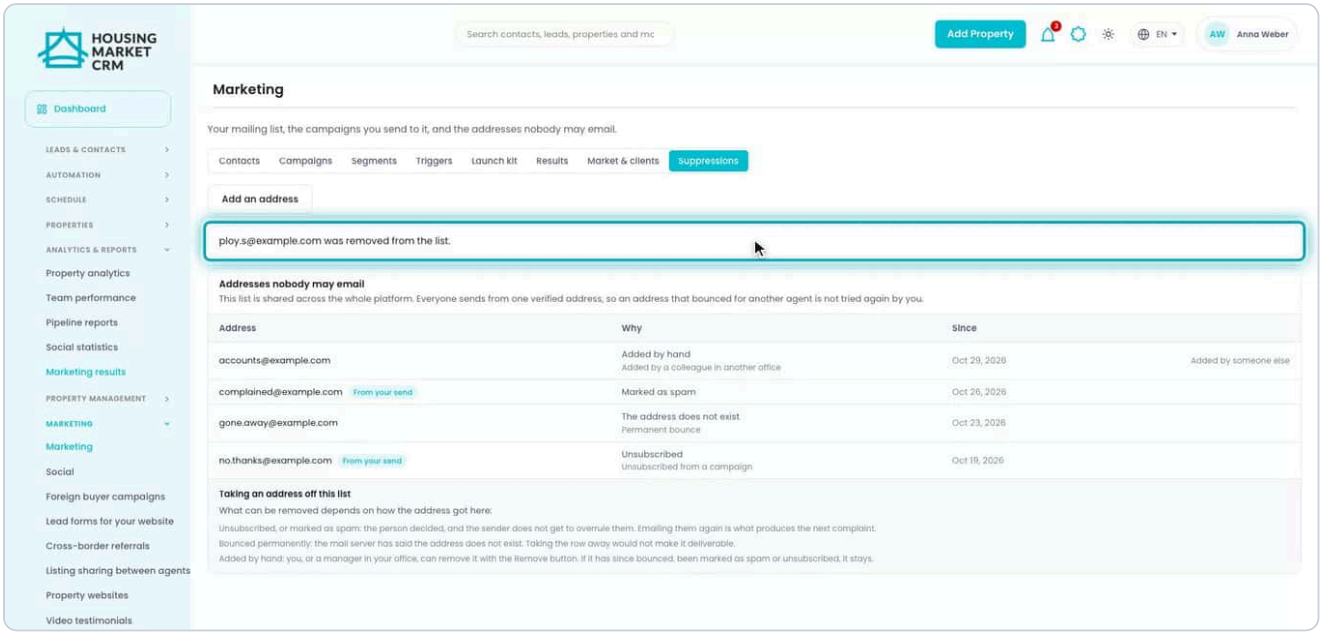


Figure 70.14 · Screen recorded 4 November 2026

15 The note under the list explains **what can be removed**.

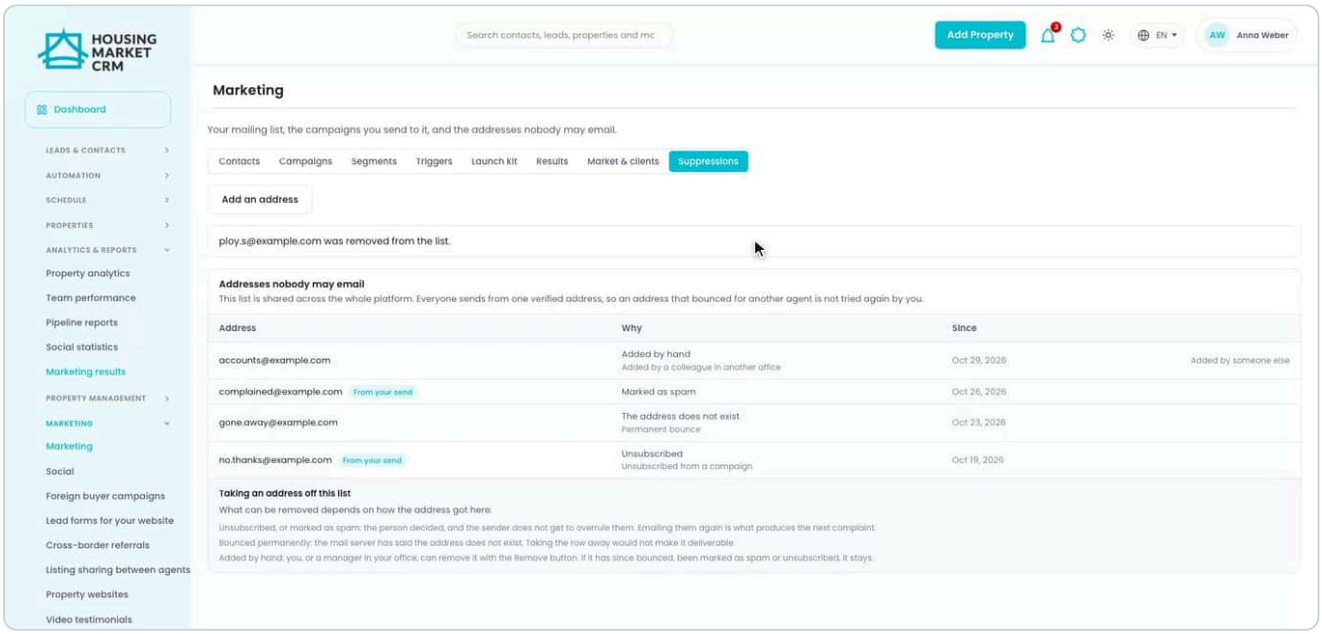


Figure 70.15 · Screen recorded 4 November 2026

16 Bounces, complaints and unsubscribes **always stay**.

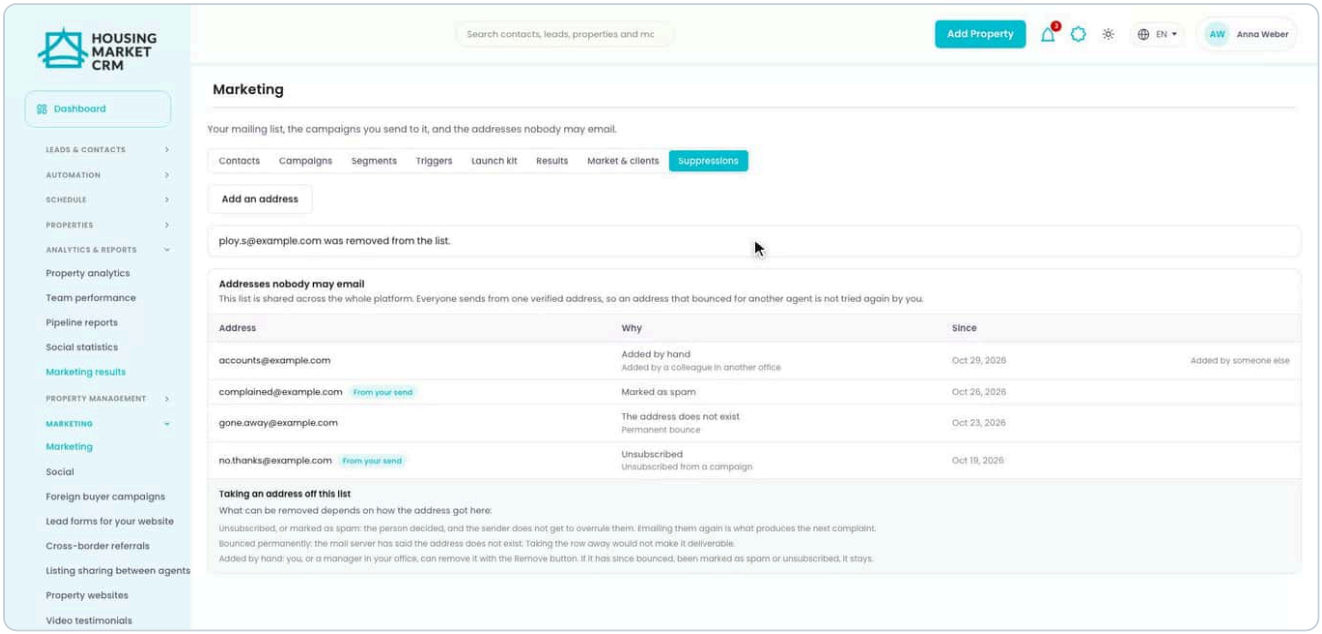


Figure 70.16 · Screen recorded 4 November 2026

71 CHAPTER 71

Email marketing limits and the suppression list

Pro and Business | For agents and agencies | Watch the video

OVERVIEW

On Pro, choose Marketing: upload your mailing list with consent recorded, build a campaign around your listings, send yourself a test, then send it now or schedule it.

Email campaigns are part of Pro. Choose Marketing in the left menu. The tabs Contacts, Campaigns and Suppressions are always there, and further tabs, such as Segments, Triggers, Launch kit and Results, appear when those Pro tools are open on your account. On Free the page explains the tool and offers Pro instead.

Your mailing list

The Contacts tab is your mailing list and shows who on it can be emailed. To add people, upload a contact list — a CSV, TSV or semicolon-separated file; save an Excel workbook as CSV first — and confirm which column is the email address, first name, last name and phone before anything is saved.

Tick These people agreed to hear from me and say where they agreed, such as a sign-up form or a viewing sheet. Only contacts with consent are ever emailed: without it they are saved but never sent a campaign, and you can record consent later.

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- Open the Campaigns tab and choose New campaign.
- Give it a name, which only you see, and a subject line, which is what the recipient sees in their inbox. Preview text and an opening message are optional.
- Choose Add a listing to feature your properties. Each card is read from the portal rather than from a saved copy, so it shows the listing as it currently is.
- Choose Save the campaign. Open it to see the preview, and choose Send myself a test to see it in your own inbox; a test is not counted in the results.

Sending it

Under Send this campaign, choose Send now, or set a time and choose Schedule it. Before you send, the screen shows how many people can be emailed and how many cannot, and why: no consent, unsubscribed, or suppressed. A scheduled campaign can be edited or cancelled until it starts sending; cancelling makes it a draft again.

Campaigns are sent from Housing Market Group's own verified address with your name on them, so there is no domain or DNS set-up on your side. Every email carries an unsubscribe link, and Results shows how many were sent, opened, clicked, bounced, marked as spam, failed or suppressed.

Suppressions

Suppressions lists the addresses nobody may email: addresses that do not exist, that marked a campaign as spam, or that unsubscribed, and any you added by hand. The list is shared across the whole platform, because everyone sends from one verified address. To add an address for someone who asked not to be emailed, choose Add an address, type it and, if you like, why. You confirm that it applies to every agent, not only to you: nobody on the platform can email it from then on, including campaigns already scheduled.

You can take back an address you added by hand: choose Remove next to it and confirm. You can remove an address you added, and so can a manager in your office. An address someone else added shows Added by someone else instead of a button, and an address that has since bounced, been marked as spam or unsubscribed stays on the list. Addresses that do not exist, that marked a campaign as spam or that unsubscribed cannot be taken off the list from the CRM, because they are the decision of the mail server or of the person, and writing to them again is what produces the next complaint.

From the Help Center: **How do I send an email campaign to my contacts?**

STEP BY STEP

1. Open your **Housing Market CRM** account.

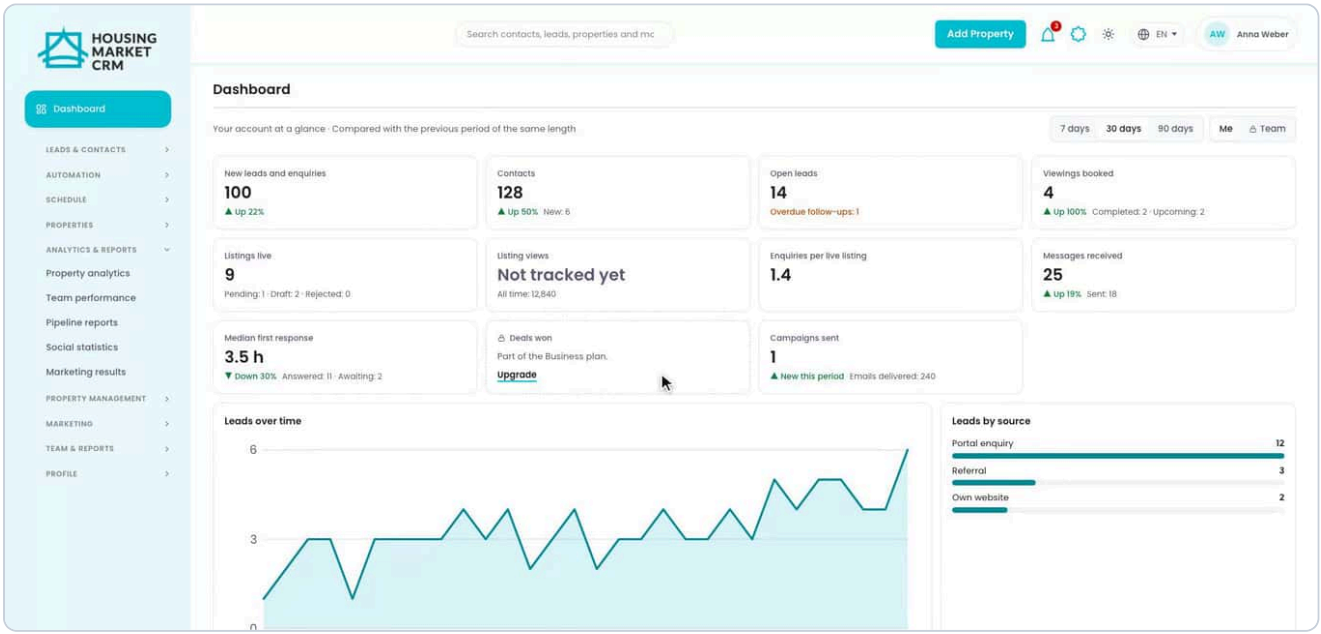


Figure 71.1 · Screen recorded 1 November 2026

2 Open the **Marketing** group in the left menu.

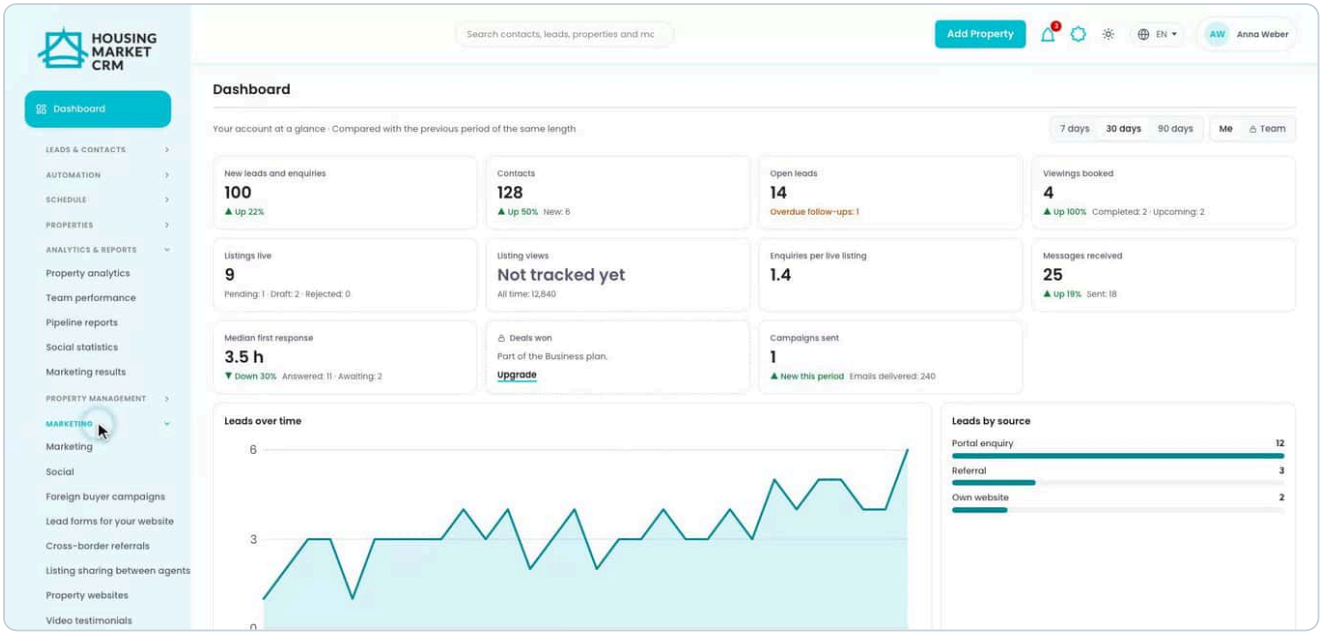


Figure 71.2 · Screen recorded 1 November 2026

3 Click **Marketing**.

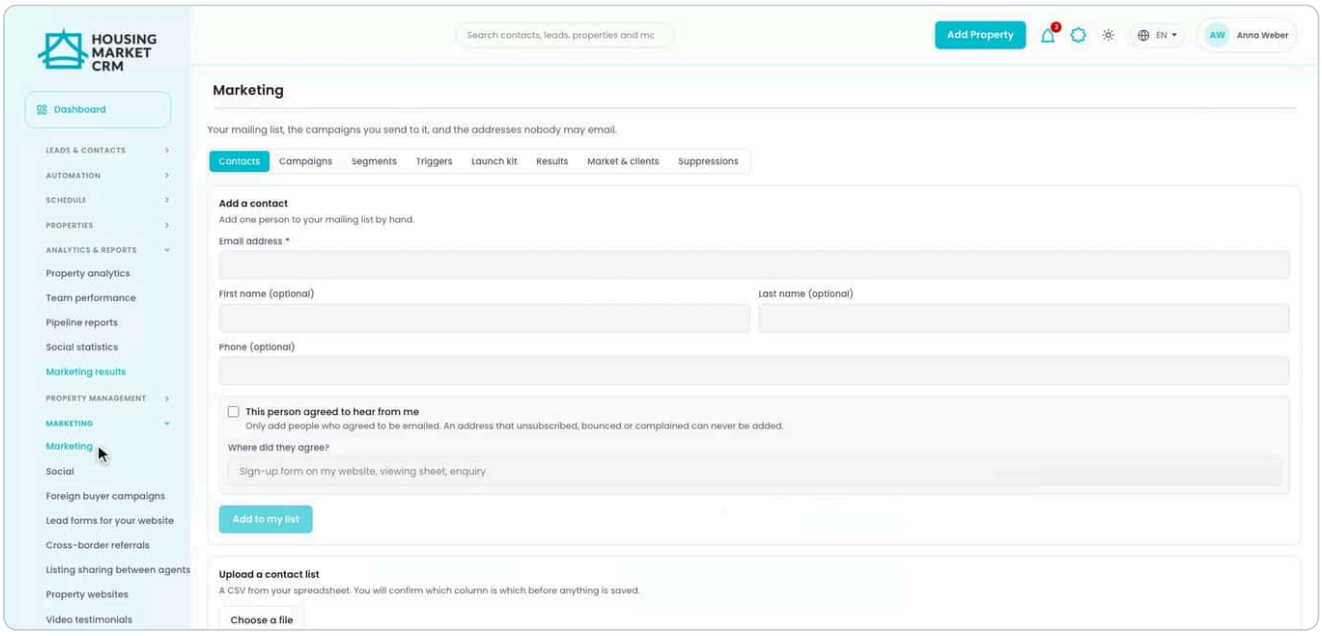


Figure 71.3 · Screen recorded 1 November 2026

4 Every contact shows **why** it can or cannot be emailed.

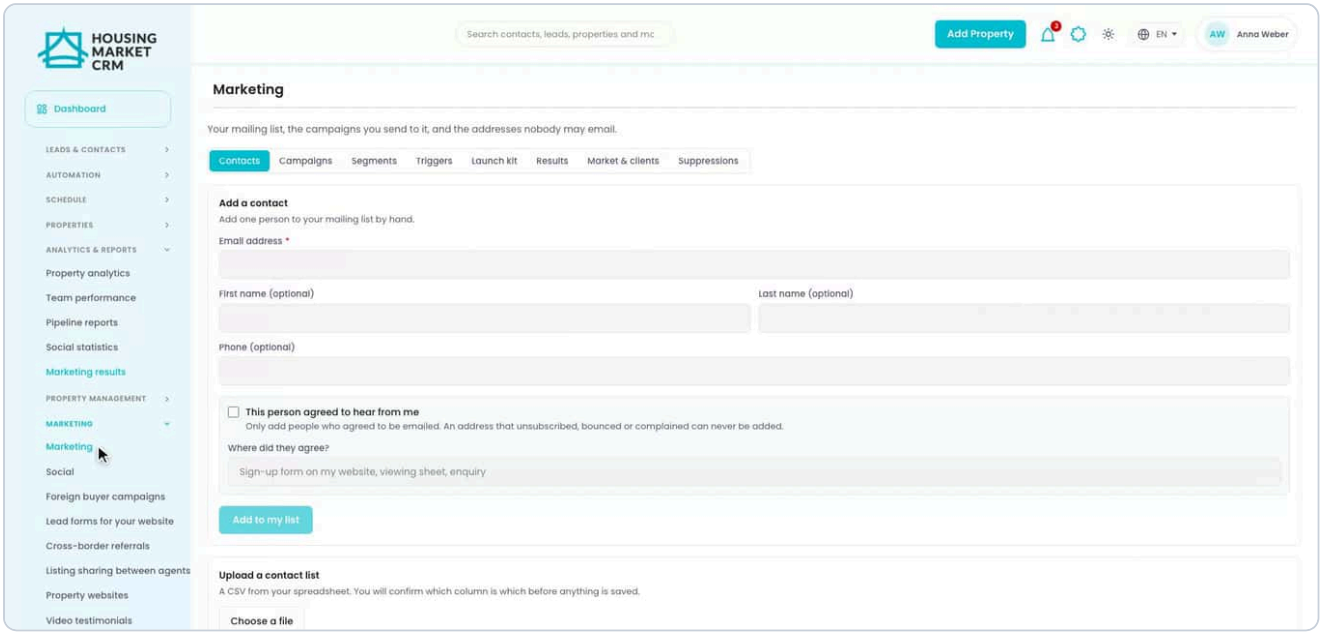


Figure 71.4 · Screen recorded 1 November 2026

5 Without **consent**, or after an **unsubscribe**, nobody is emailed.

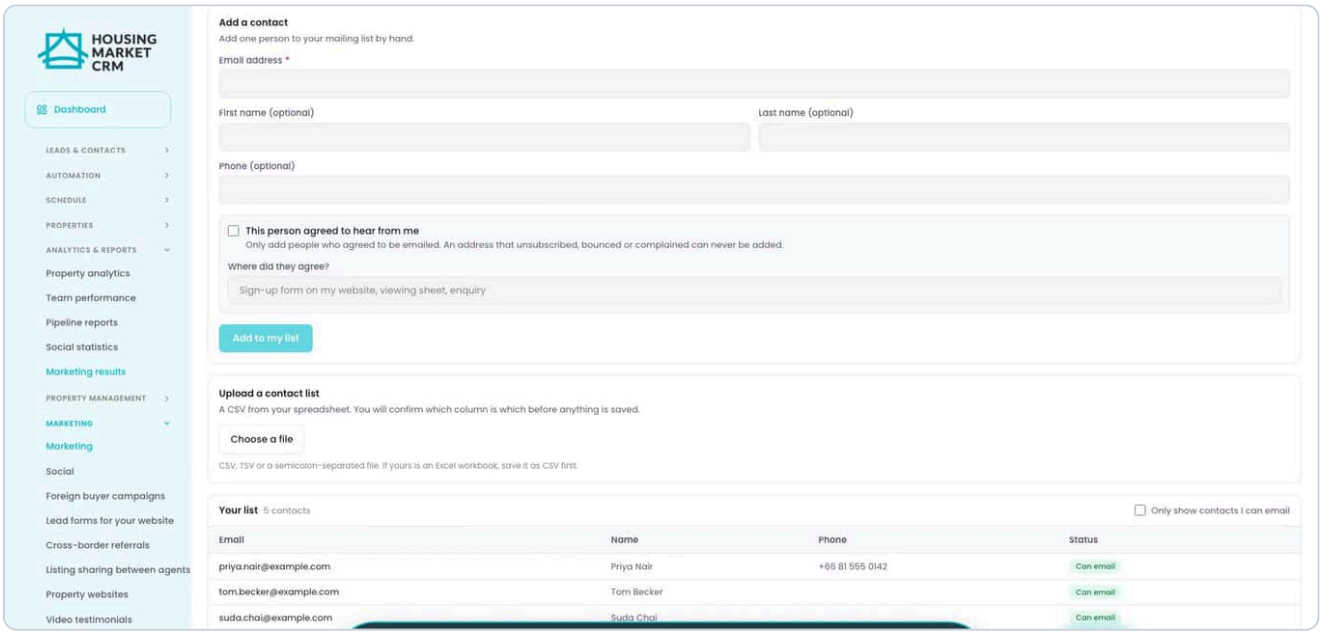


Figure 71.5 · Screen recorded 1 November 2026

6 Open the **Campaigns** tab.

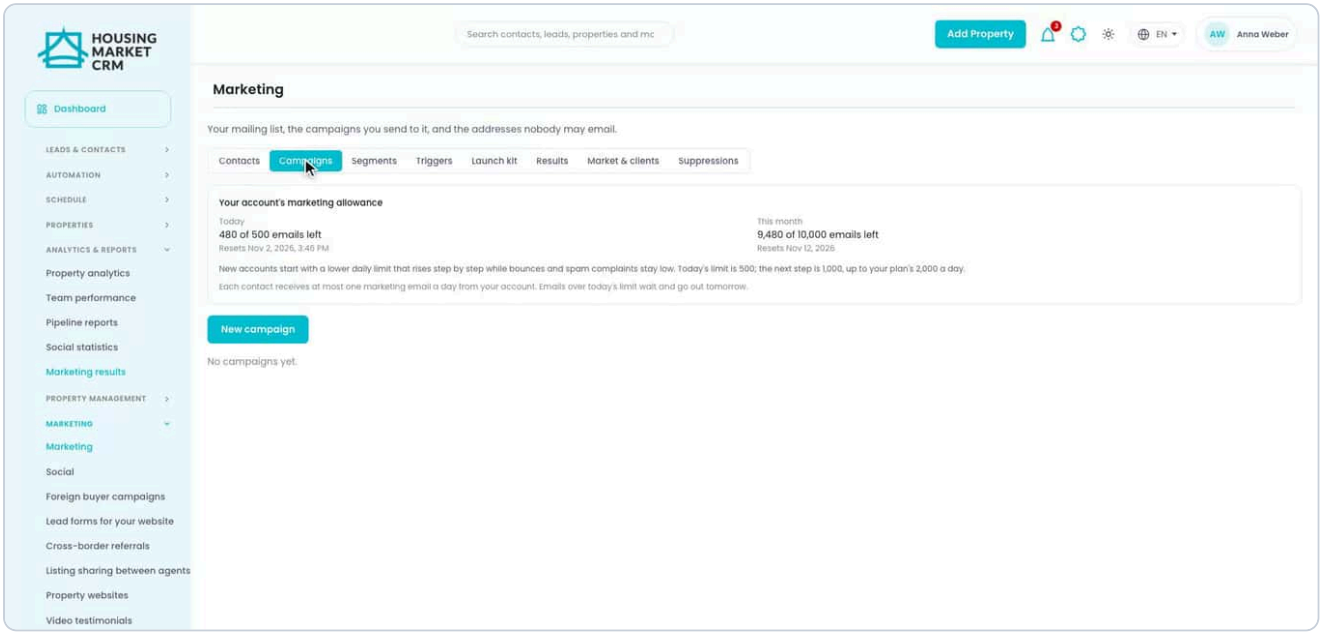


Figure 71.6 · Screen recorded 1 November 2026

7 Your **allowance** shows how many emails you can still send.

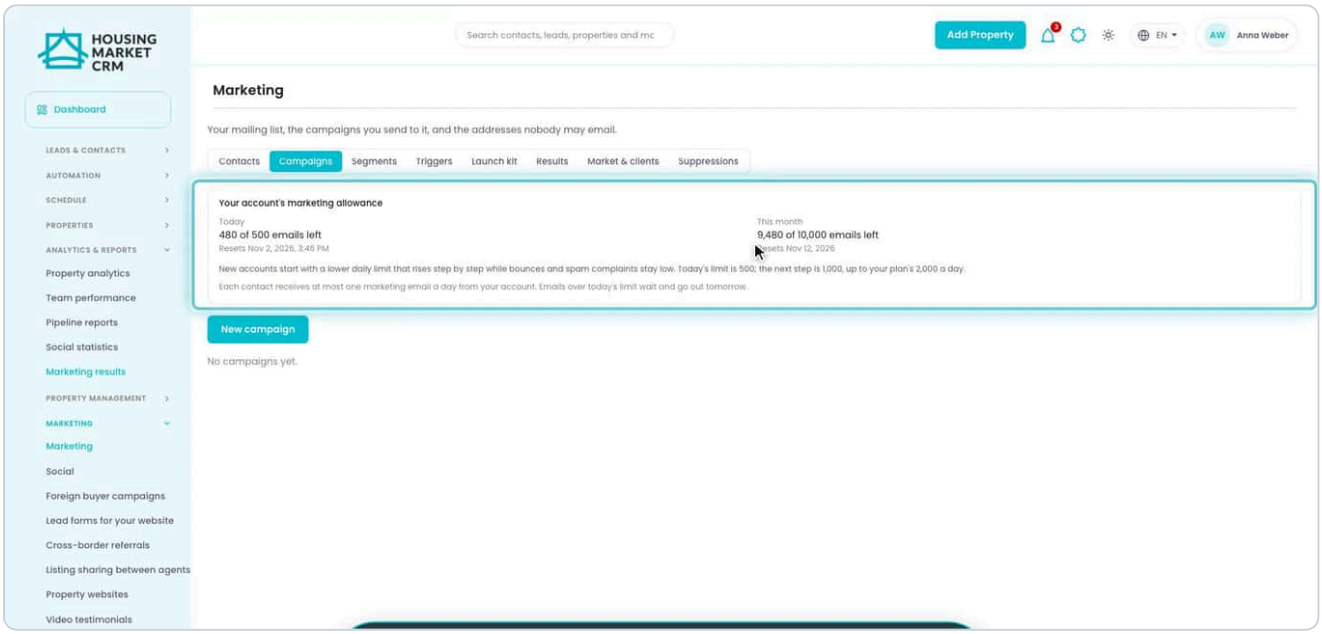


Figure 71.7 · Screen recorded 1 November 2026

8 New accounts start **lower**, and the limit rises step by step.

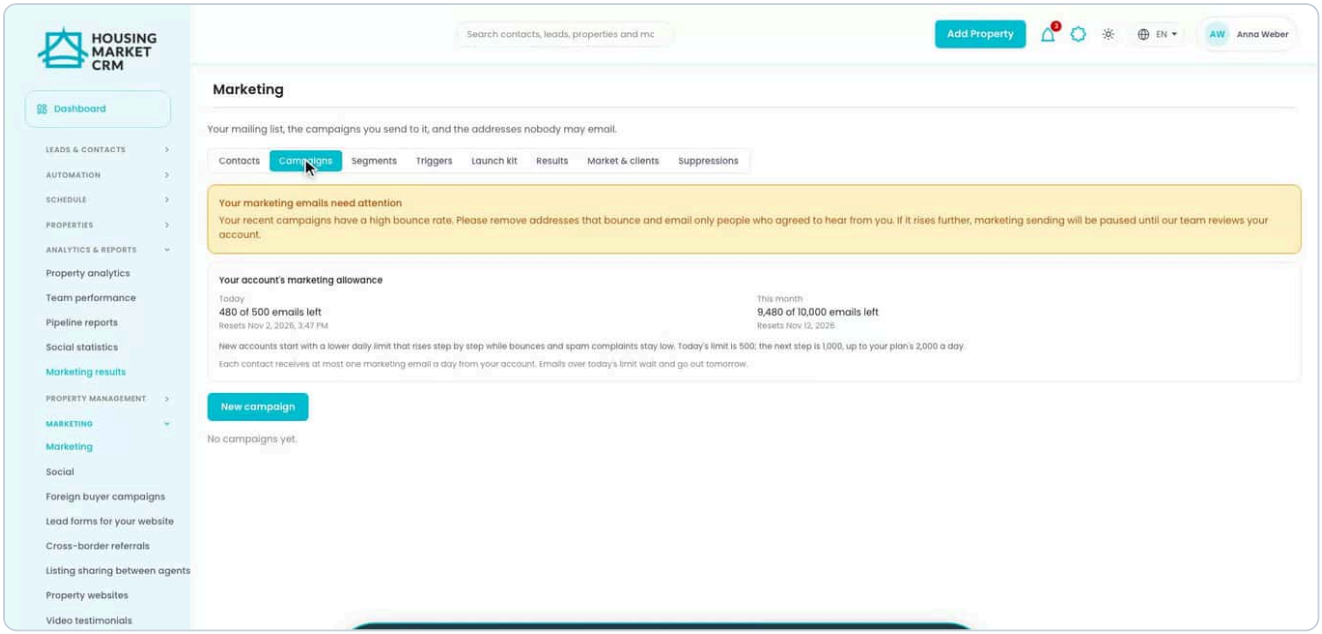


Figure 71.8 · Screen recorded 1 November 2026

9 A high **bounce** or **complaint** rate brings a **warning**.

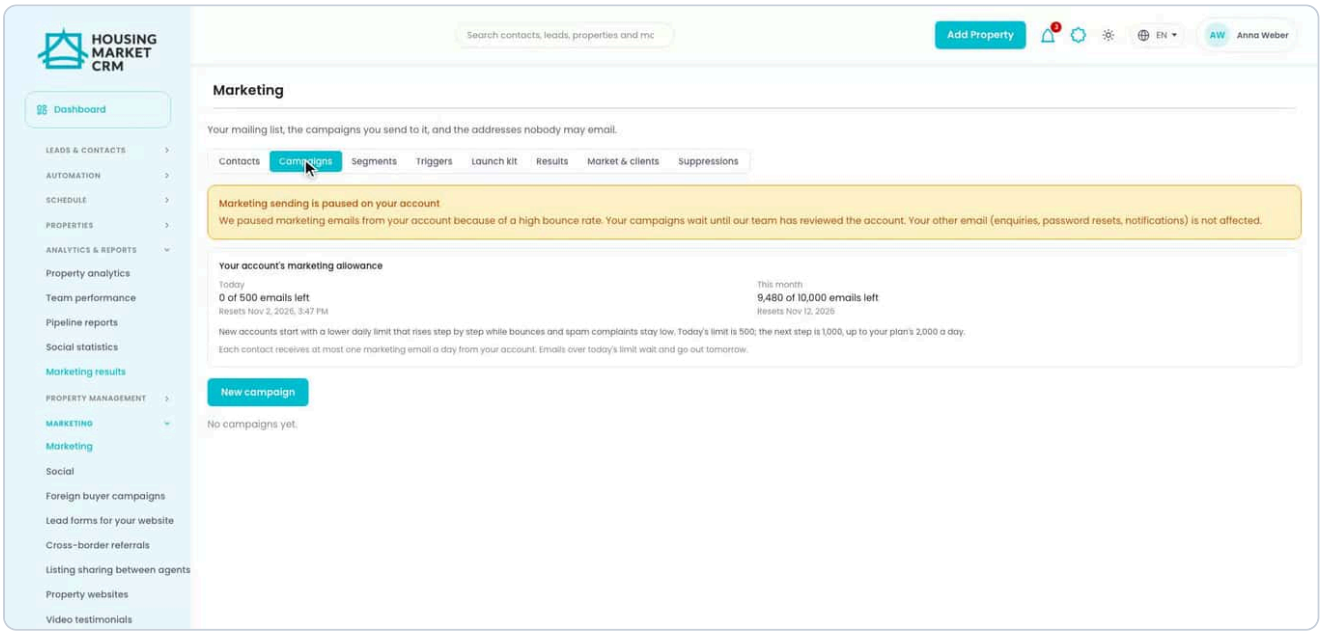


Figure 71.9 · Screen recorded 1 November 2026

10 If it rises further, marketing is **paused** until the team reviews it.

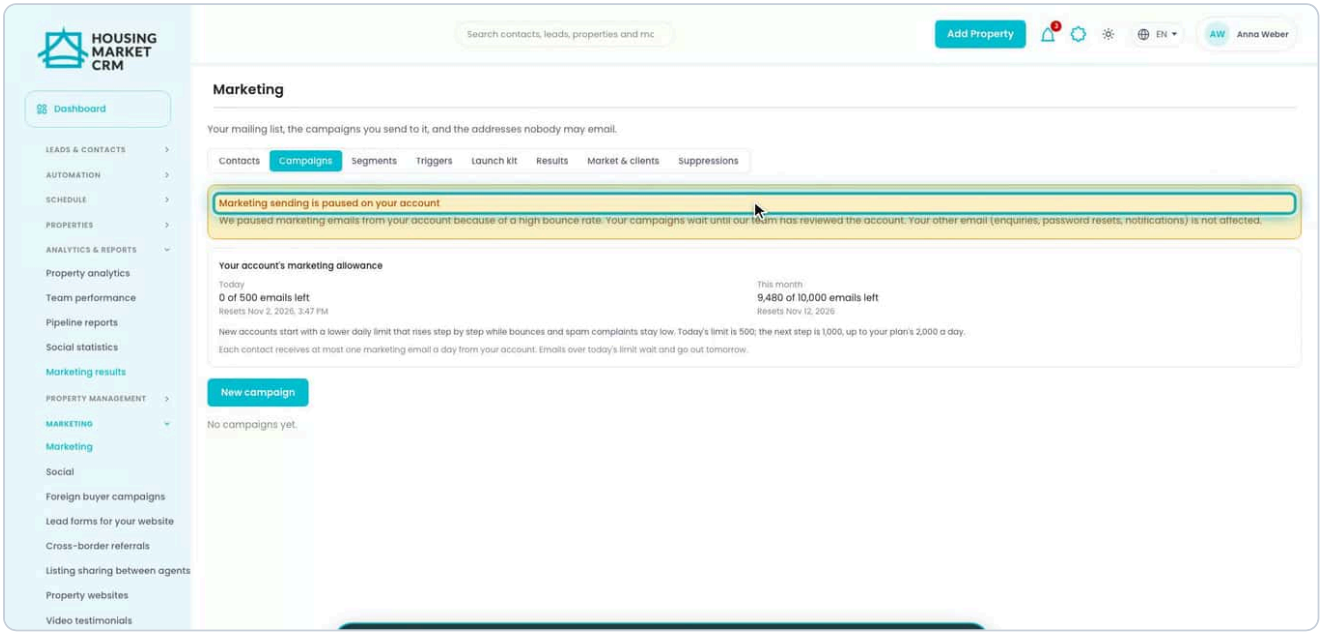


Figure 71.10 · Screen recorded 1 November 2026

11 **Enquiries, password resets and notifications** keep working.

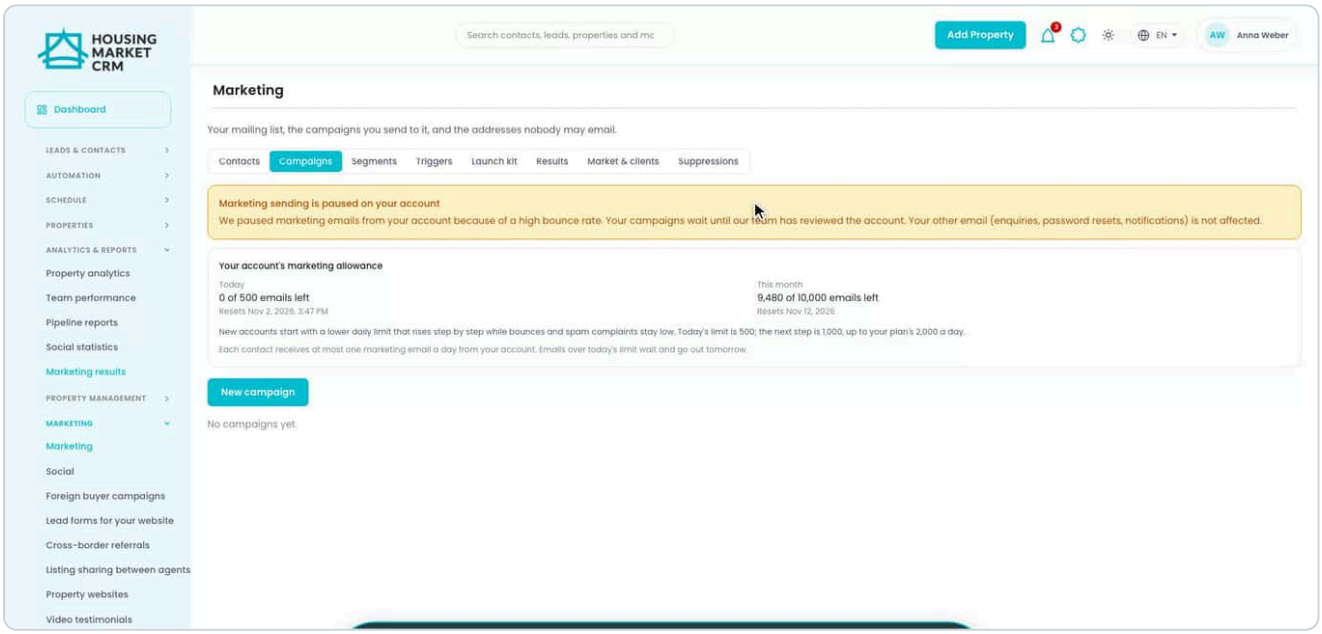


Figure 71.11 · Screen recorded 1 November 2026

12 Open the **Suppressions** tab.

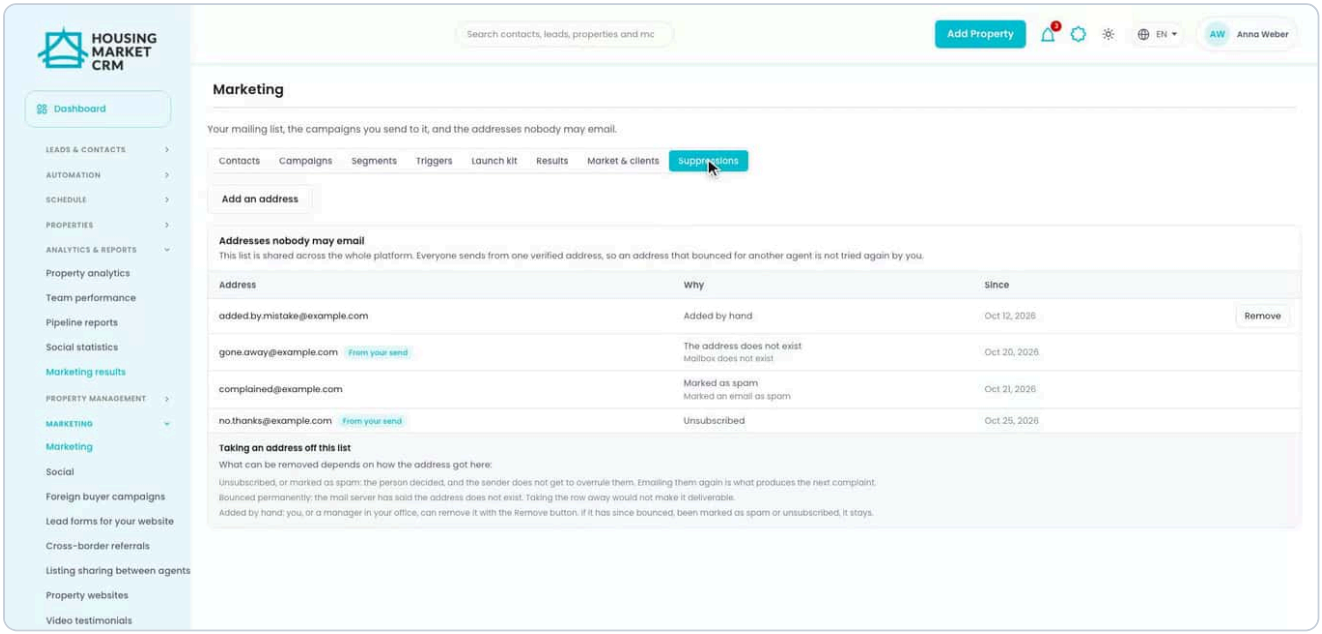


Figure 71.12 · Screen recorded 1 November 2026

13 Addresses that **bounced, complained or unsubscribed** are shared by every agent.

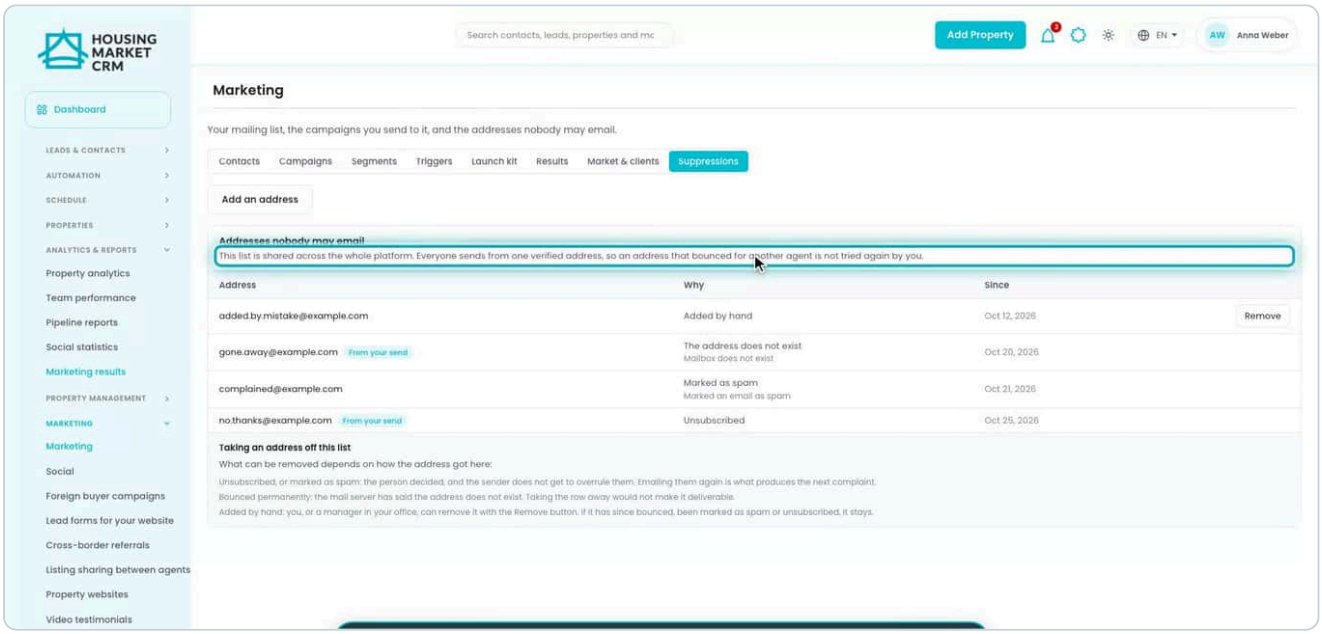


Figure 71.13 · Screen recorded 1 November 2026

14 Those stay on the list: they are the **mailbox's or the person's** decision.

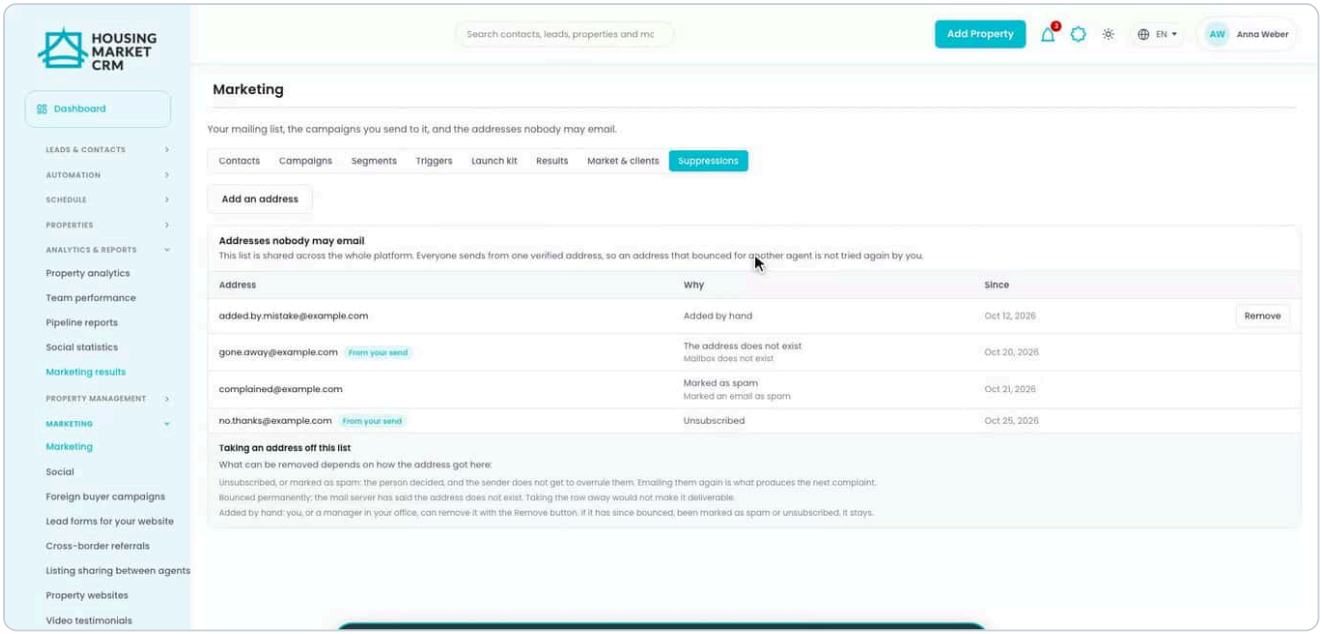


Figure 71.14 · Screen recorded 1 November 2026

15 An address **you added by hand** has a **Remove** button.

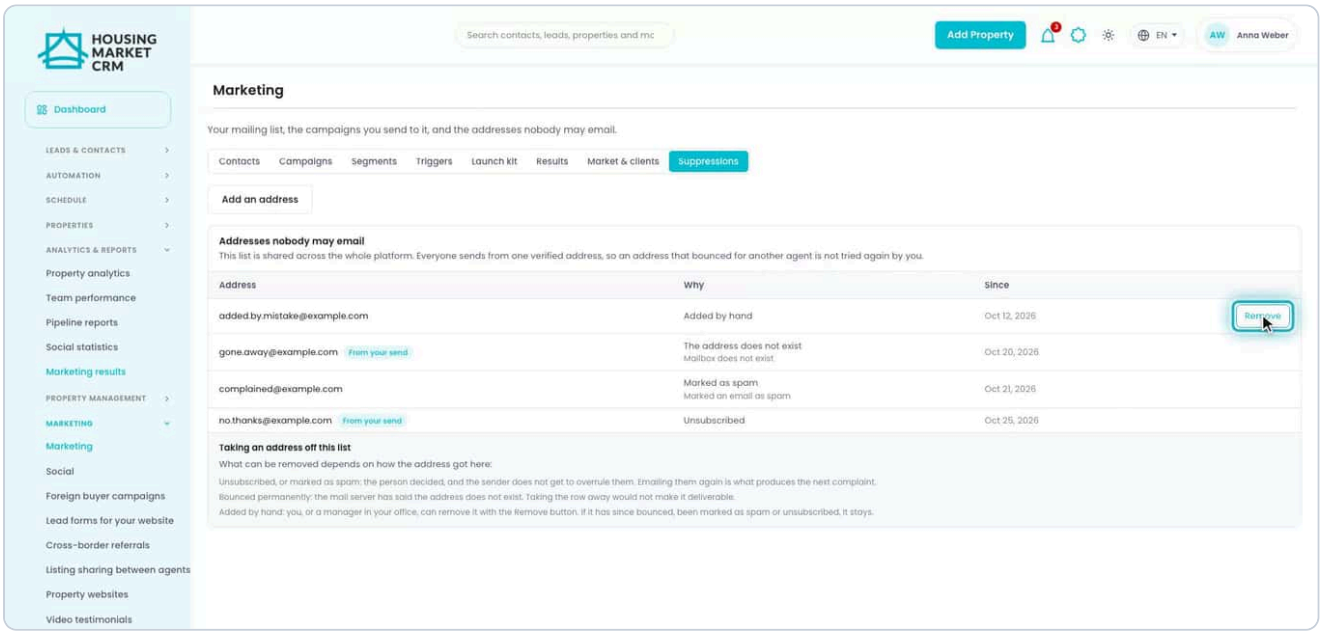


Figure 71.15 · Screen recorded 1 November 2026

16 Click **Remove**.

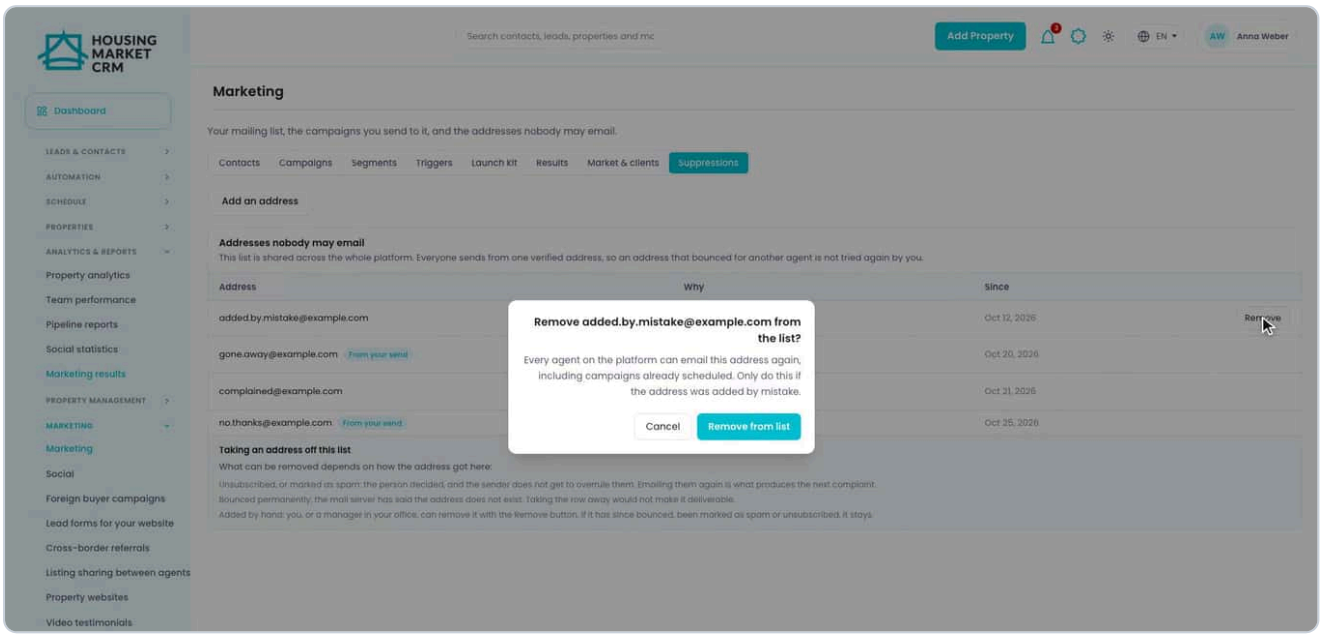


Figure 71.16 · Screen recorded 1 November 2026

17 The question names the address and what removing it **allows**.

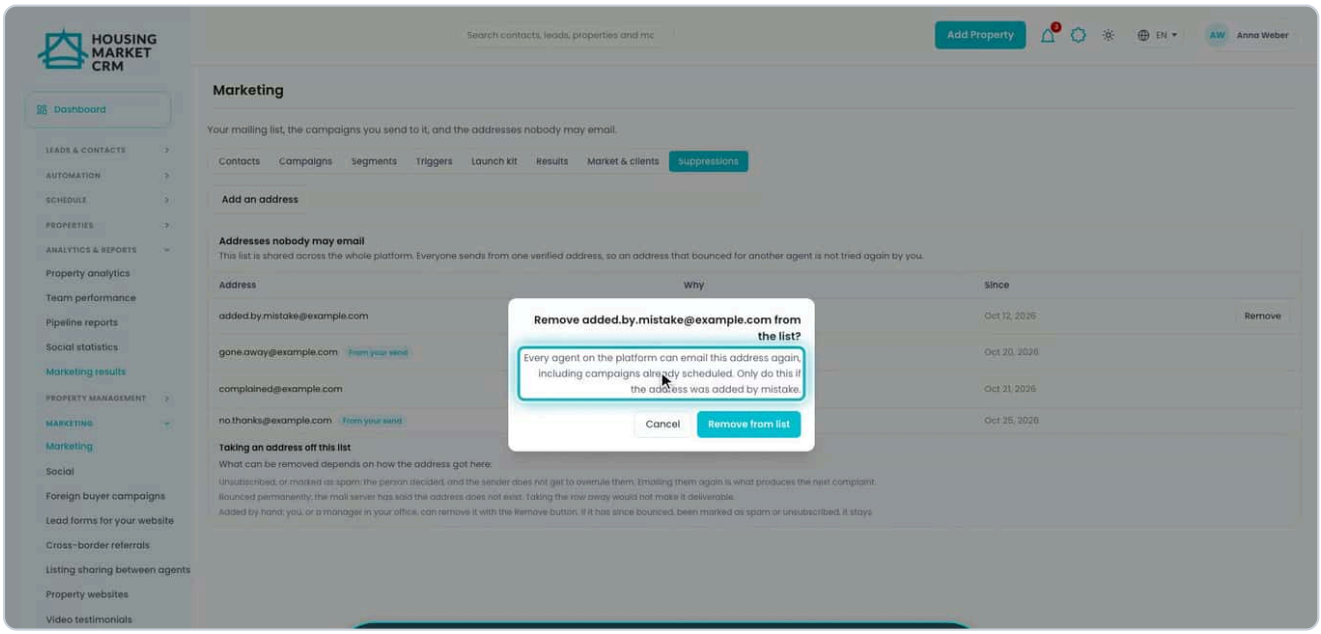


Figure 71.17 · Screen recorded 1 November 2026

18 Click **Remove from list** only if it was added by mistake.

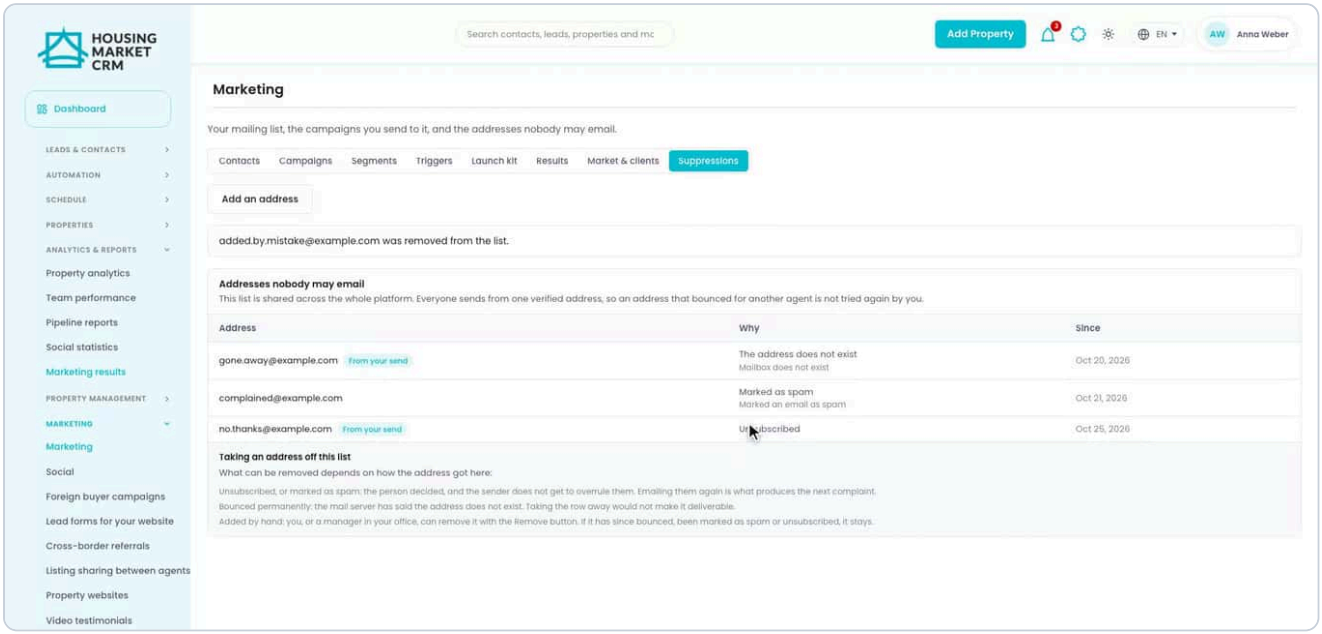


Figure 71.18 · Screen recorded 1 November 2026

19 The address leaves the list. Bounces, complaints and unsubscribes **cannot** be removed.

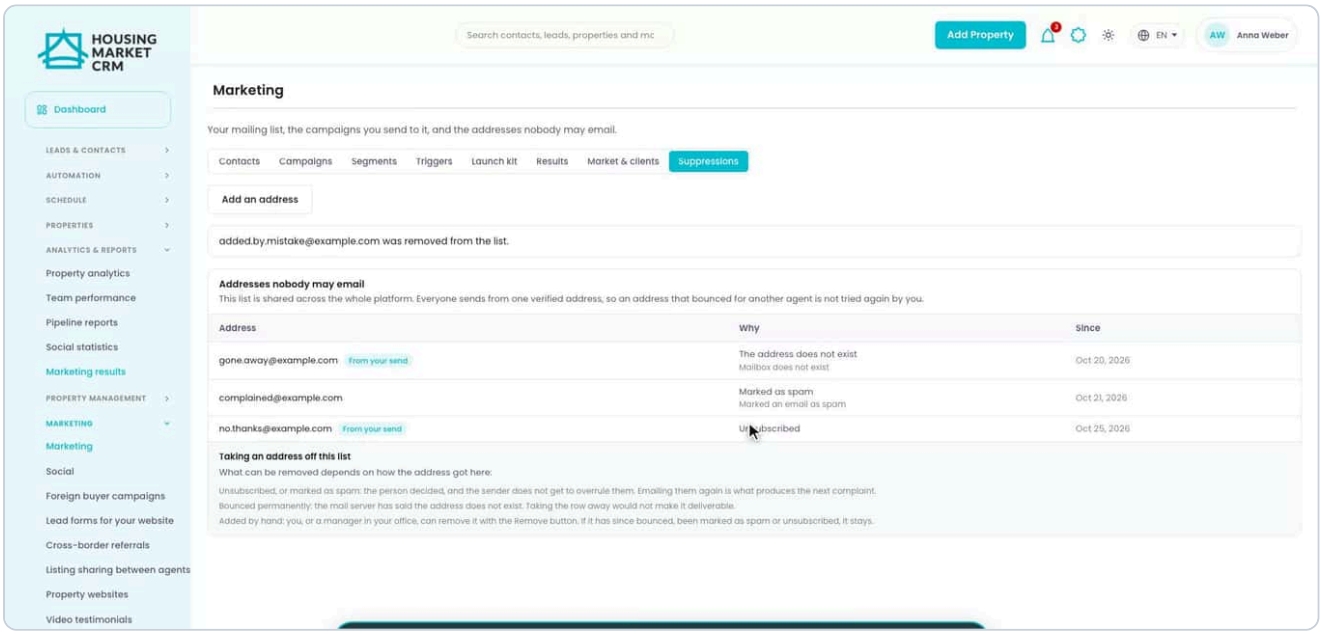


Figure 71.19 · Screen recorded 1 November 2026

PART 5

AI Autopilot (add-on)

72 Start AI Autopilot

73 Set up AI Autopilot

74 Approve AI Autopilot replies

75 What AI Autopilot knows about a lead

76 Handover and the morning digest

77 AI Autopilot: overview

72 CHAPTER 72

Start AI Autopilot

AI Autopilot add-on | For agents | Watch the video

OVERVIEW

A paid add-on for Housing Market CRM that drafts replies to new enquiries in your name, qualifies the lead, follows up and hands the lead to you as soon as a person is needed.

In the CRM it is called AI Autopilot. When a new enquiry arrives from a property contact form, or a lead it is handling writes back, it drafts a reply in your name and in the enquirer's language.

Through the conversation it records the budget, timeline, purpose, financing status, preferred areas and property type on the lead, keeps a short summary and score up to date, suggests other matching listings, offers viewing times from your availability, follows up when a lead goes quiet and moves the lead between your existing pipeline stages. Every action is logged on the lead with the time and the reason.

It works on leads in markets where replies to your emails can be captured in the CRM; where that is not yet the case, the lead file says so.

From the Help Center: **What is Housing Market CRM AI Autopilot?**

STEP BY STEP

1 Open a lead in **Housing Market CRM**.

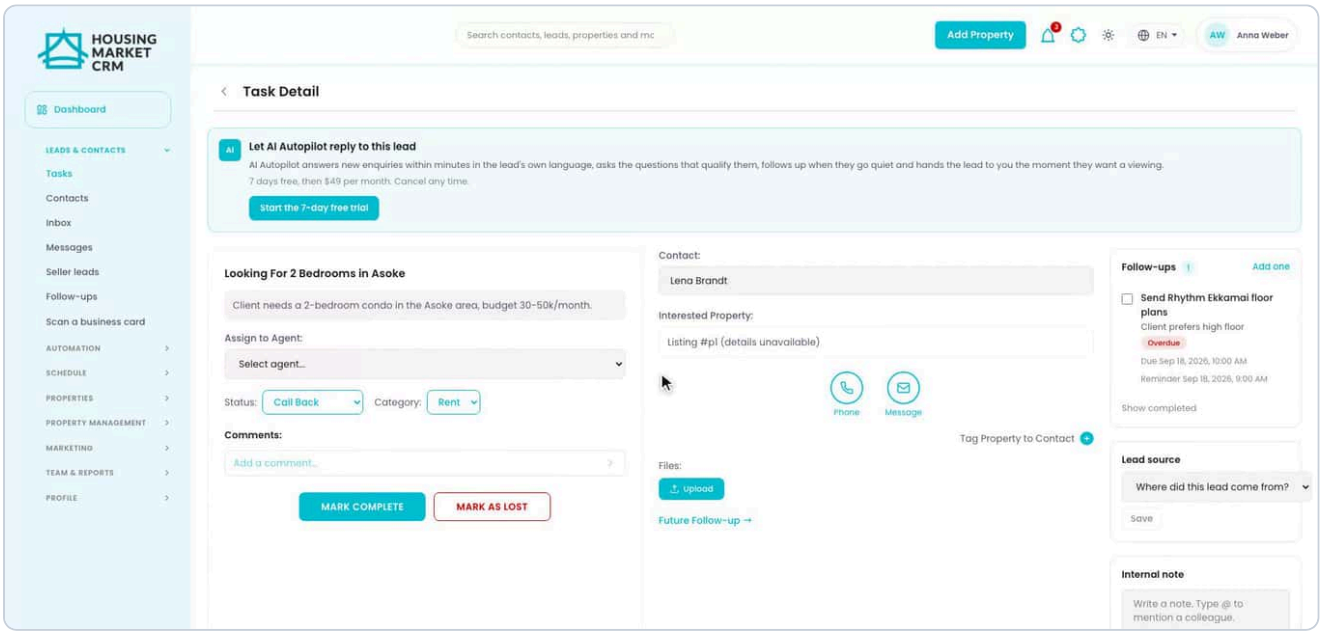


Figure 72.1 · Screen recorded 23 October 2026

2 AI Autopilot offers to reply to this lead for you.

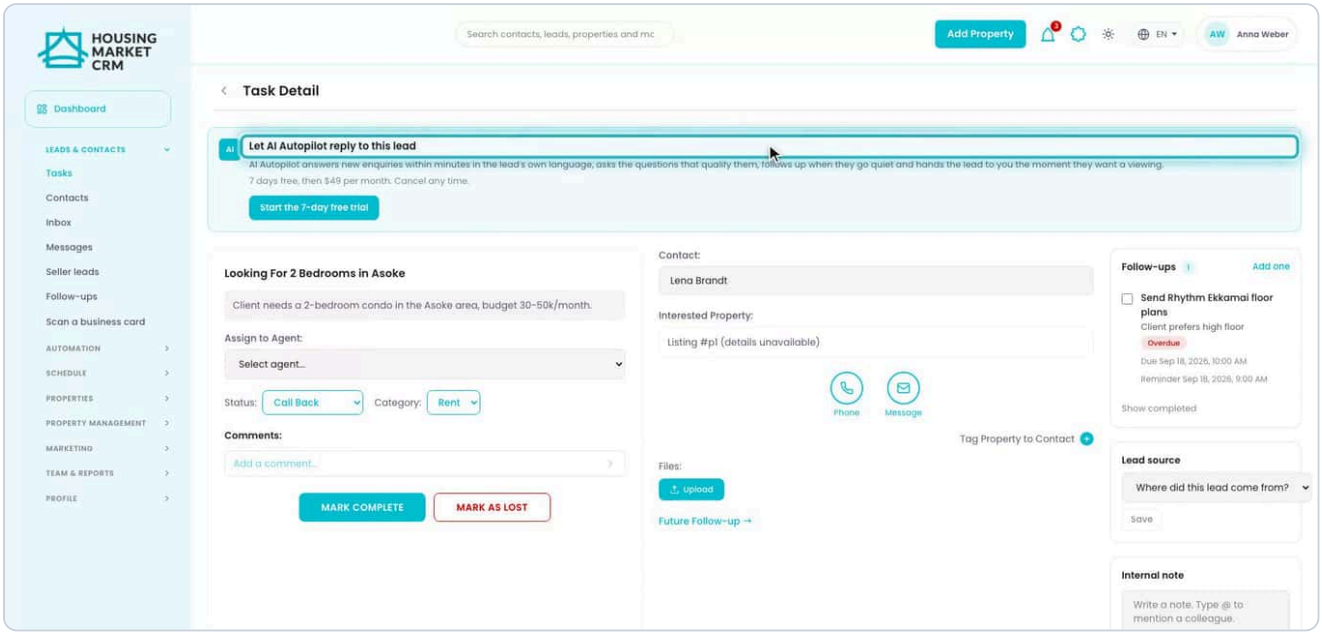


Figure 72.2 · Screen recorded 23 October 2026

3 A first reply within minutes, in the lead's own language.

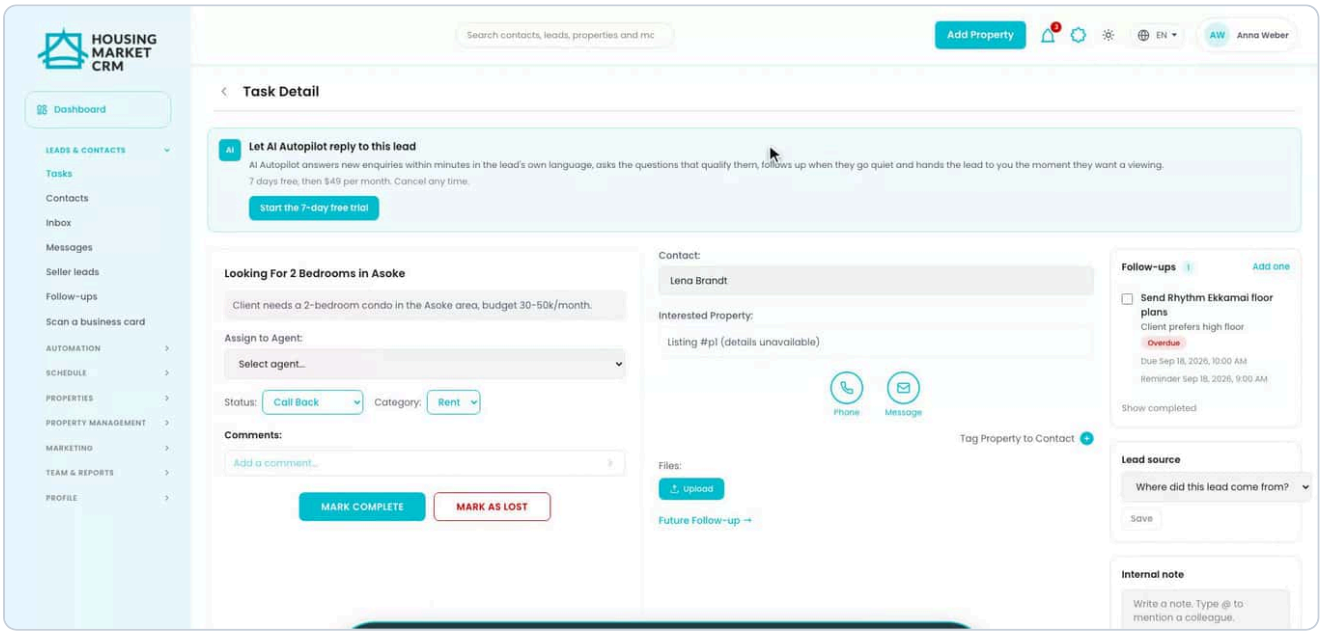


Figure 72.3 · Screen recorded 23 October 2026

4 Open **Automation** in the left menu.

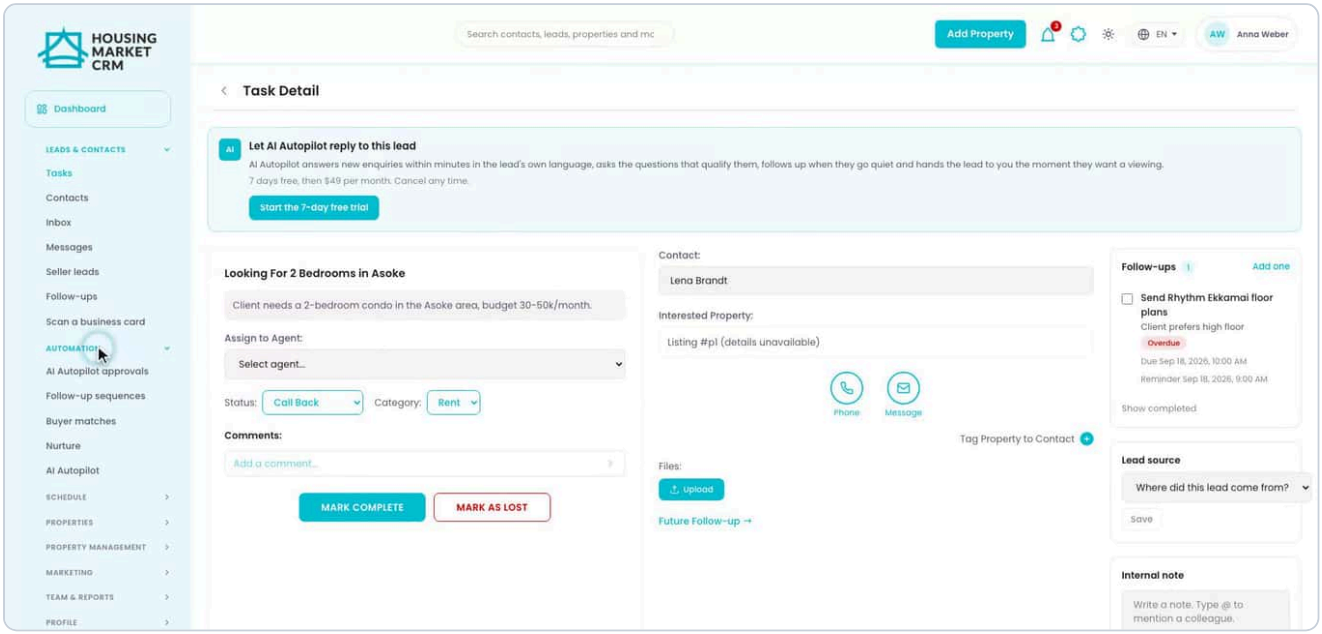


Figure 72.4 · Screen recorded 23 October 2026

5 Open **AI Autopilot** in the left menu.

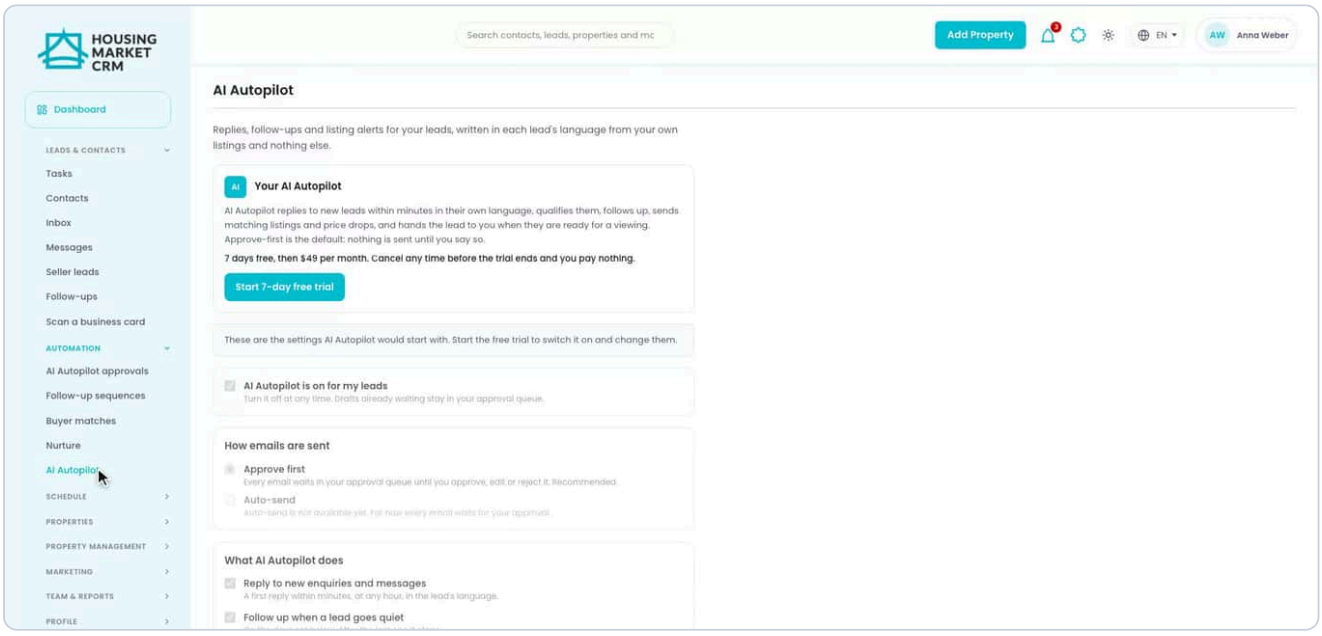


Figure 72.5 · Screen recorded 23 October 2026

6 It is an **add-on**, on top of any plan.

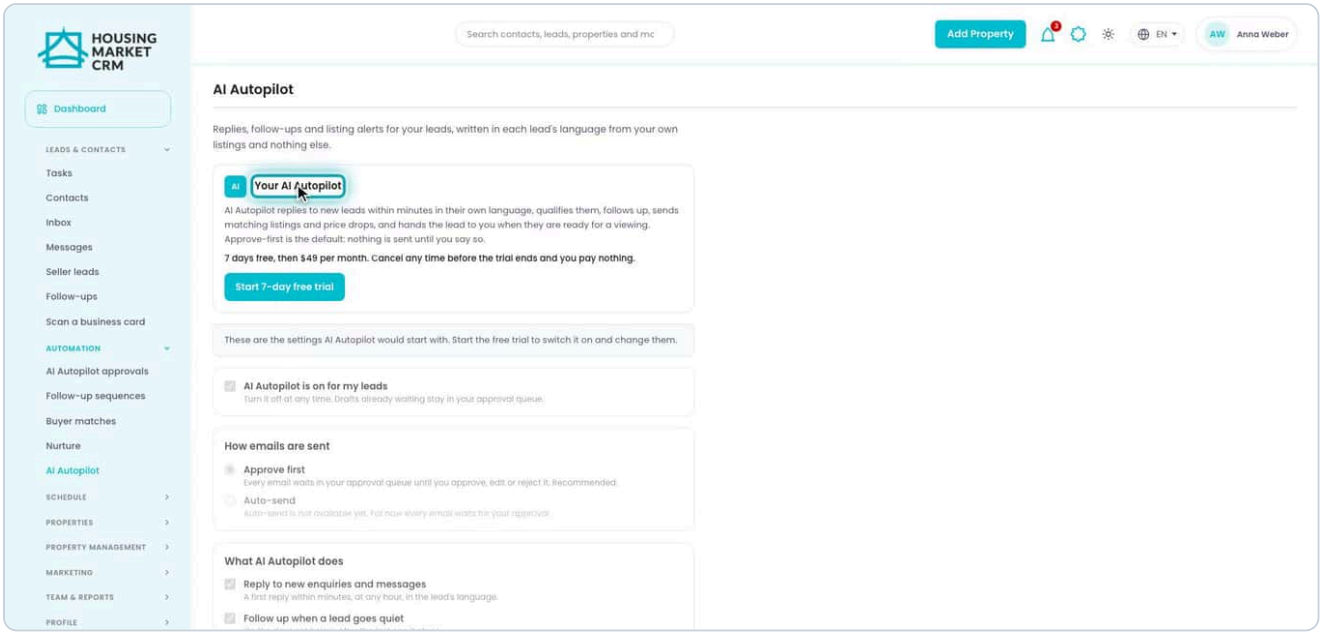


Figure 72.6 · Screen recorded 23 October 2026

7 **Nothing is sent** until you approve it.

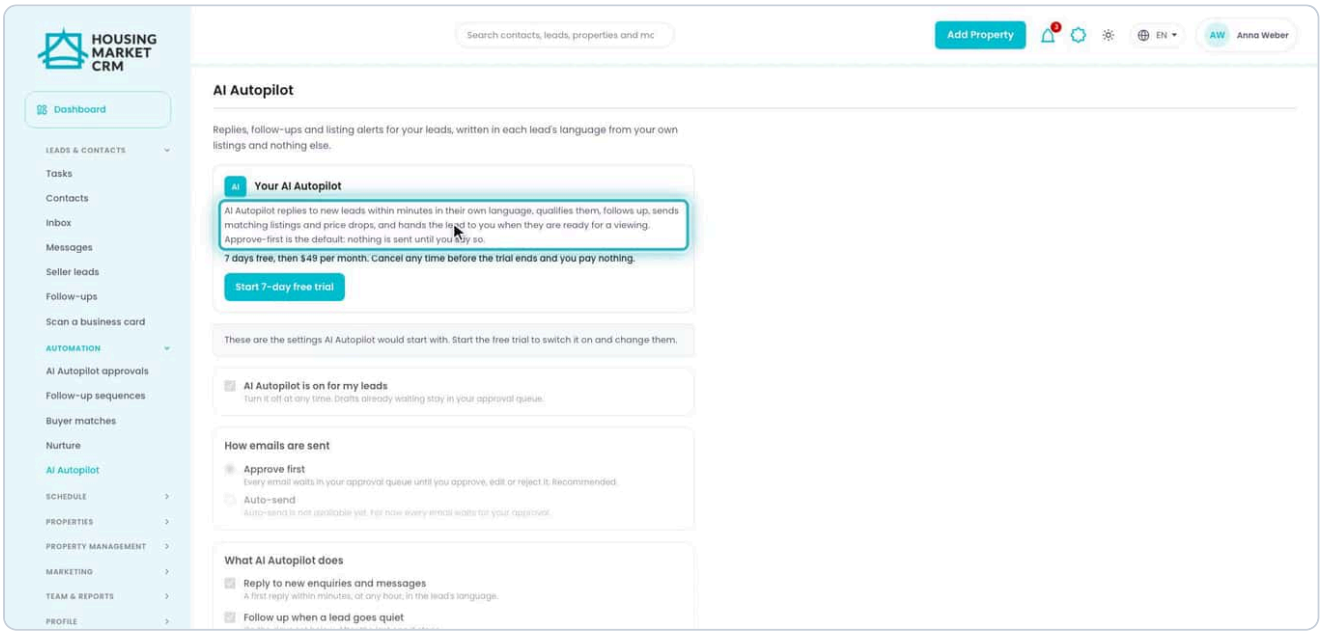


Figure 72.7 · Screen recorded 23 October 2026

8 **7 days free**, then **49 USD** a month. Cancel any time.

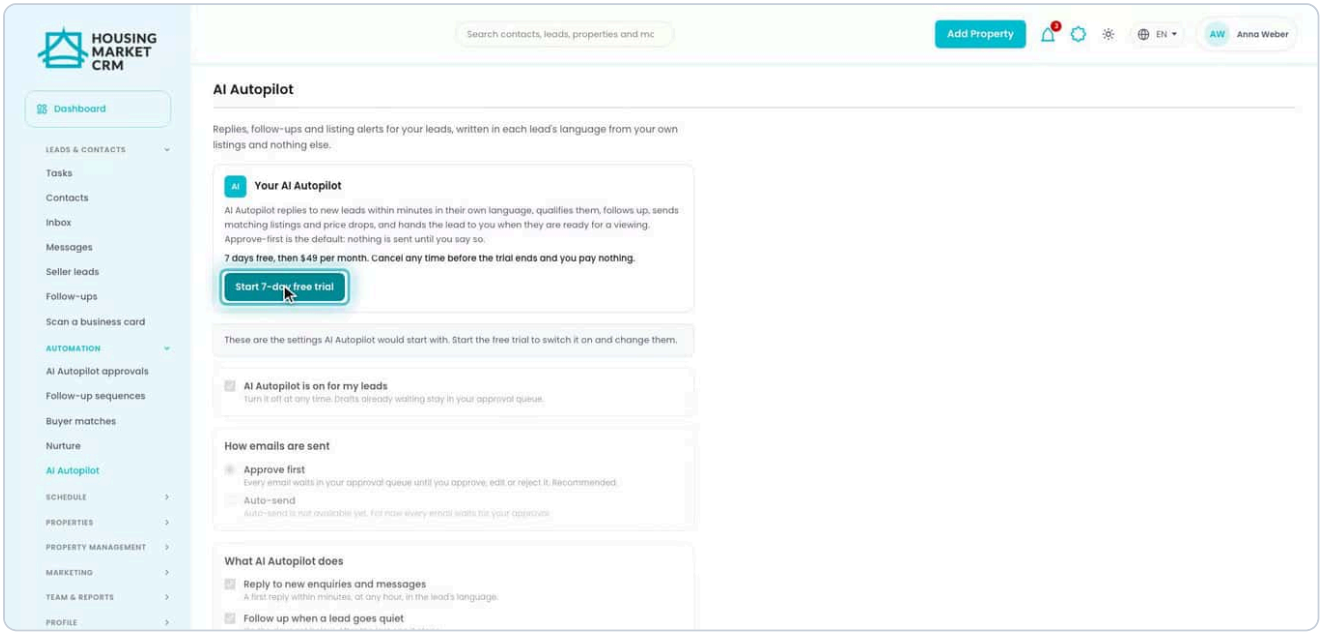


Figure 72.8 · Screen recorded 23 October 2026

9 The settings below show how it would start. You change them once it is on.

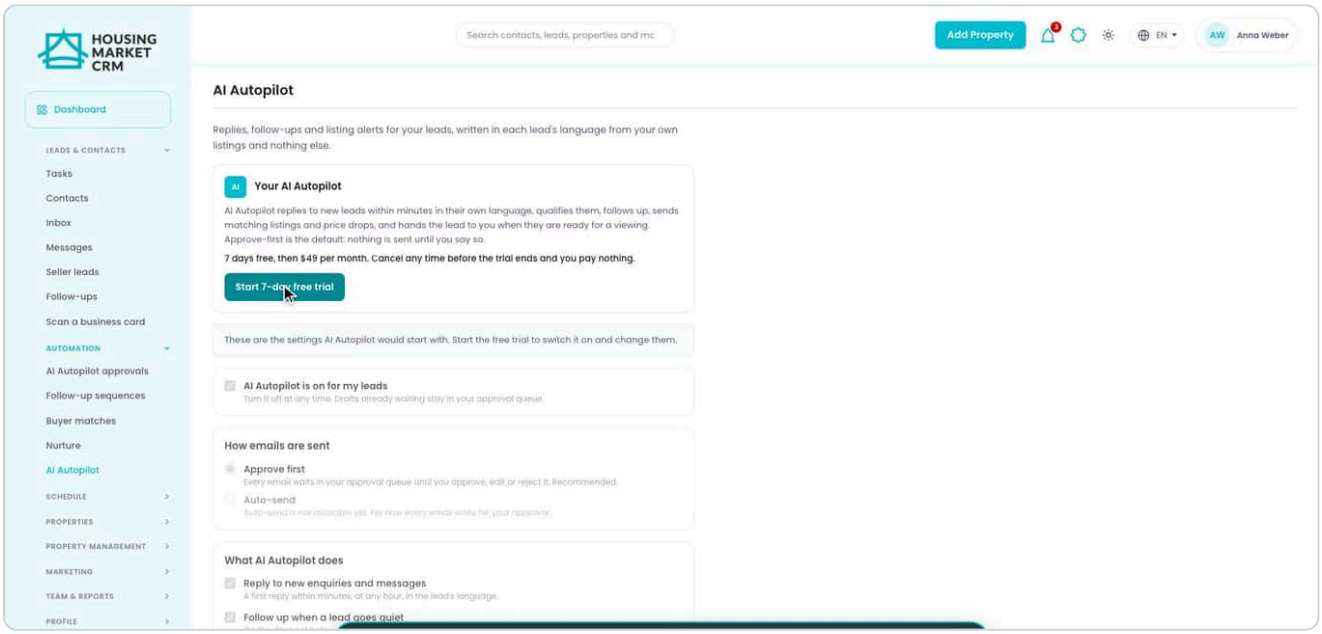


Figure 72.9 · Screen recorded 23 October 2026

GOOD TO KNOW

NOTE 49 USD per month, on top of any Housing Market CRM plan, with a free trial of 7 days.

Help Center: How much does AI Autopilot cost?

RELATED HELP CENTER ARTICLES

Who is Housing Market CRM designed for?	faq.housingmarketgroup.com/faq/who-is-housing-market-crm-designed-for

73 CHAPTER 73

Set up AI Autopilot

AI Autopilot add-on | For agents | Watch the video

OVERVIEW

By default nothing goes out until you approve it. It never sends one lead more than one Autopilot email a day, and it stops completely on a lead as soon as a person is needed.

Every draft waits for your approval in the lead file and in the approval queue, where you can approve it, edit it or reject it.

It hands the lead over

AI Autopilot stops completely on a lead, and tells you in the CRM and by email with its summary at the top of the lead, when:

- you reply to the lead yourself
- the lead asks for a viewing
- the lead makes an offer
- the lead asks it to stop or unsubscribes

You can also switch it off or on for any single lead.

One email a day

A lead receives at most one AI Autopilot email per day. When several are due, a reply to the lead's own message comes first, then viewings and price drops, then new listings, then follow-ups; the rest wait for the next day.

From the Help Center: **What does AI Autopilot send, and when does it stop?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

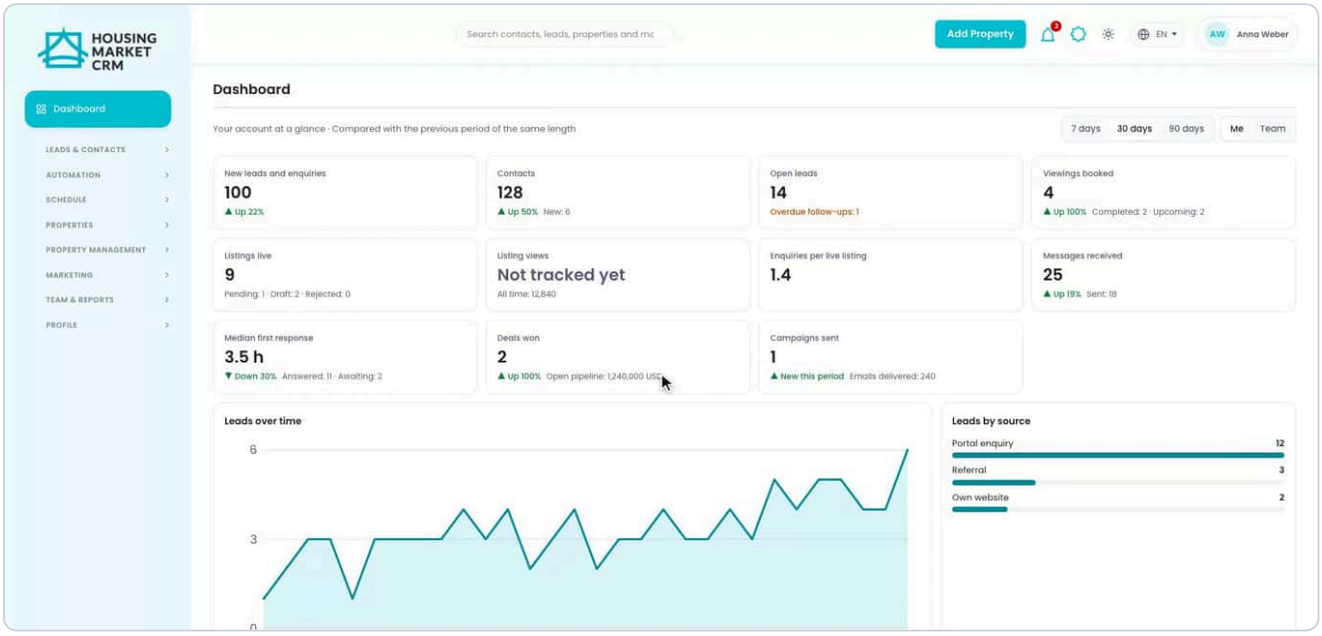


Figure 73.1 · Screen recorded 23 October 2026

2 Open **Automation** in the left menu.

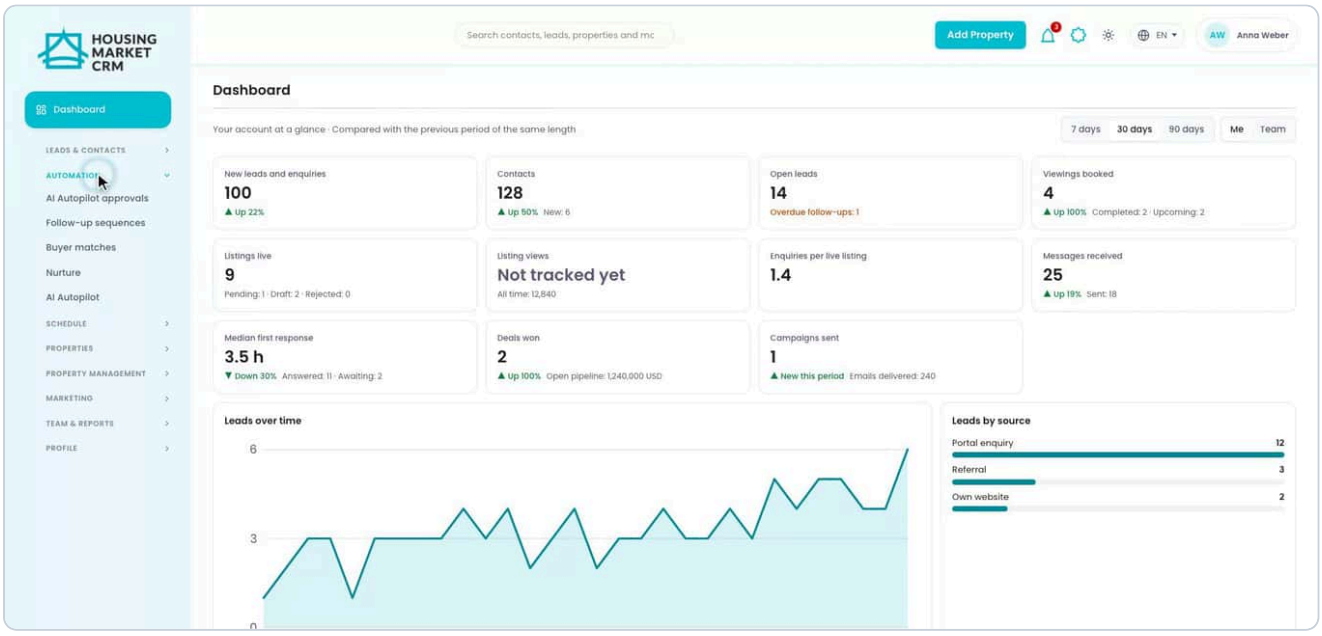


Figure 73.2 · Screen recorded 23 October 2026

3 Click **AI Autopilot** in the left menu.

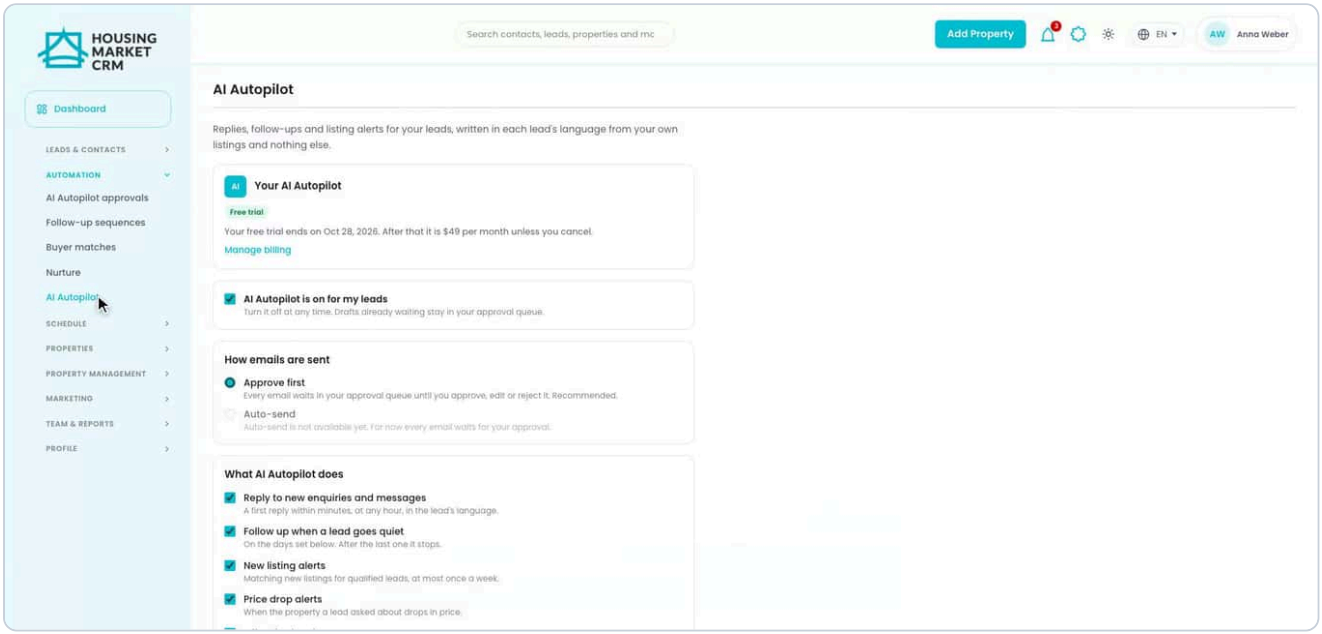


Figure 73.3 · Screen recorded 23 October 2026

4 One switch turns it **on or off** for your leads.

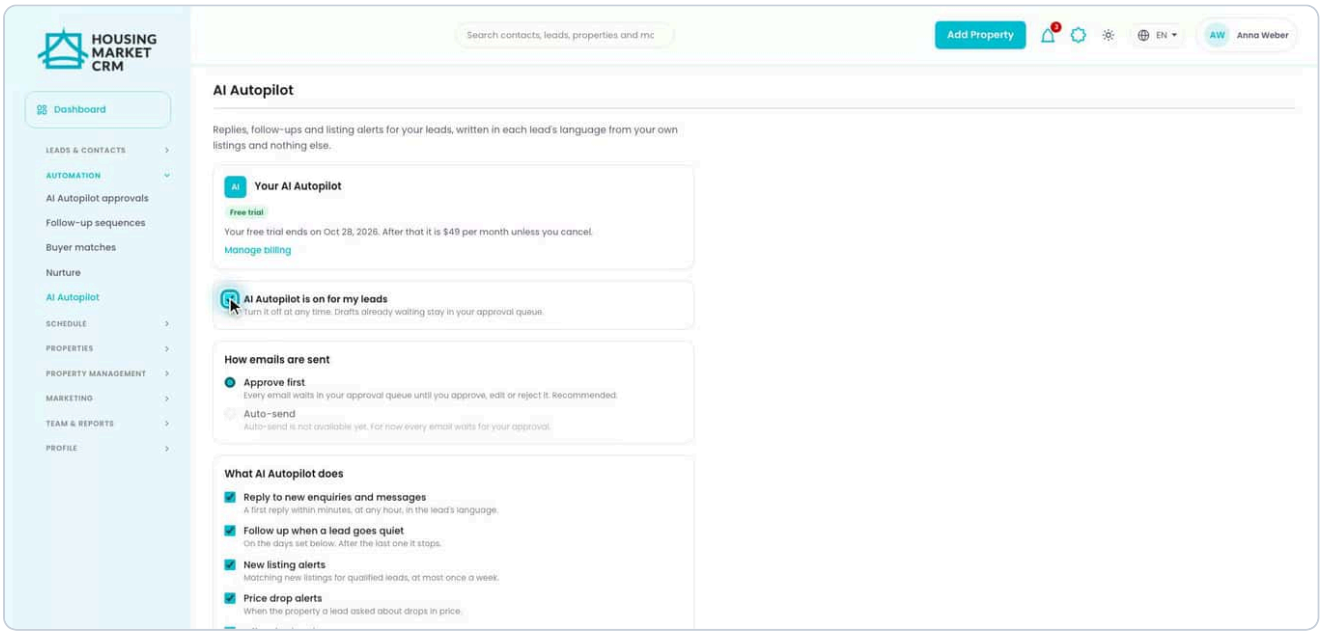


Figure 73.4 · Screen recorded 23 October 2026

5 **Approve first**: every email waits for you.

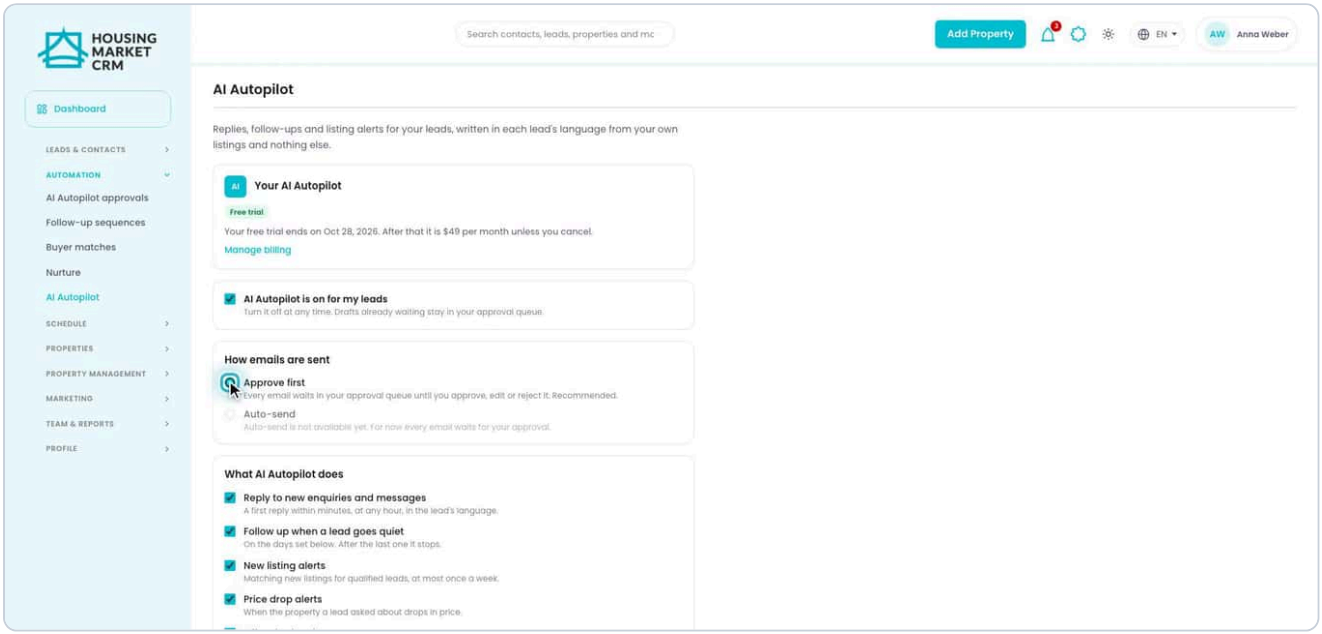


Figure 73.5 · Screen recorded 23 October 2026

6 **Auto-send** is not available yet.

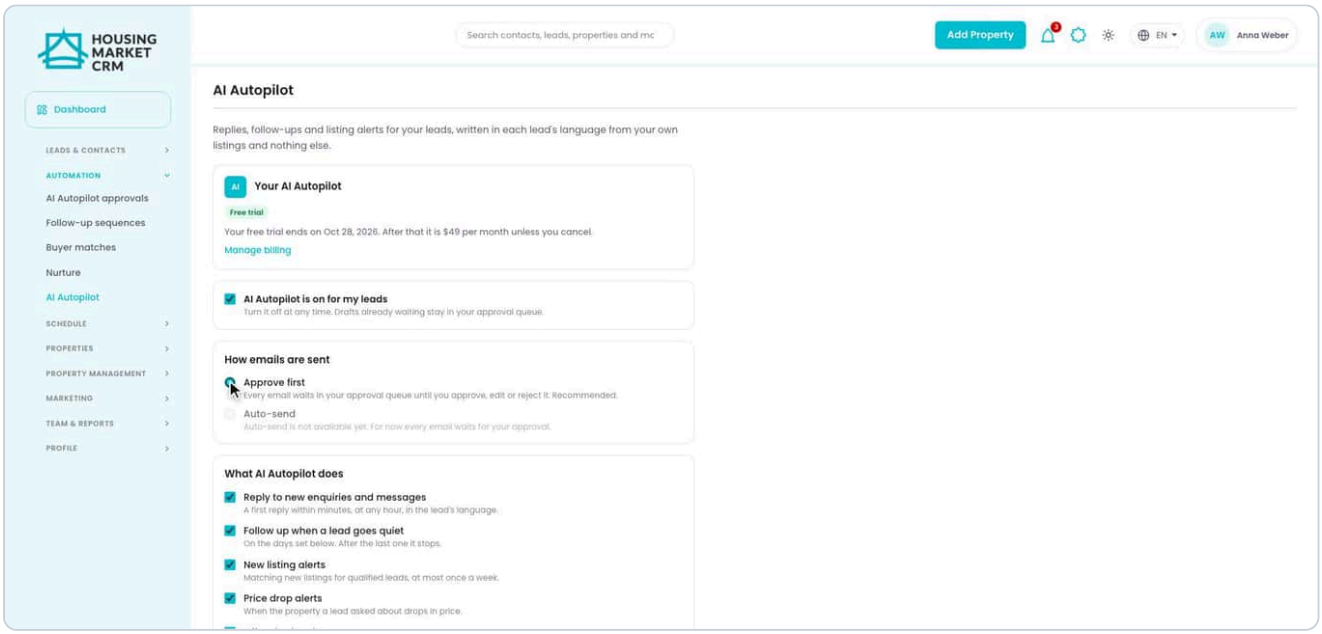


Figure 73.6 · Screen recorded 23 October 2026

7 Choose its **jobs**: replies, follow-ups, alerts, viewings.

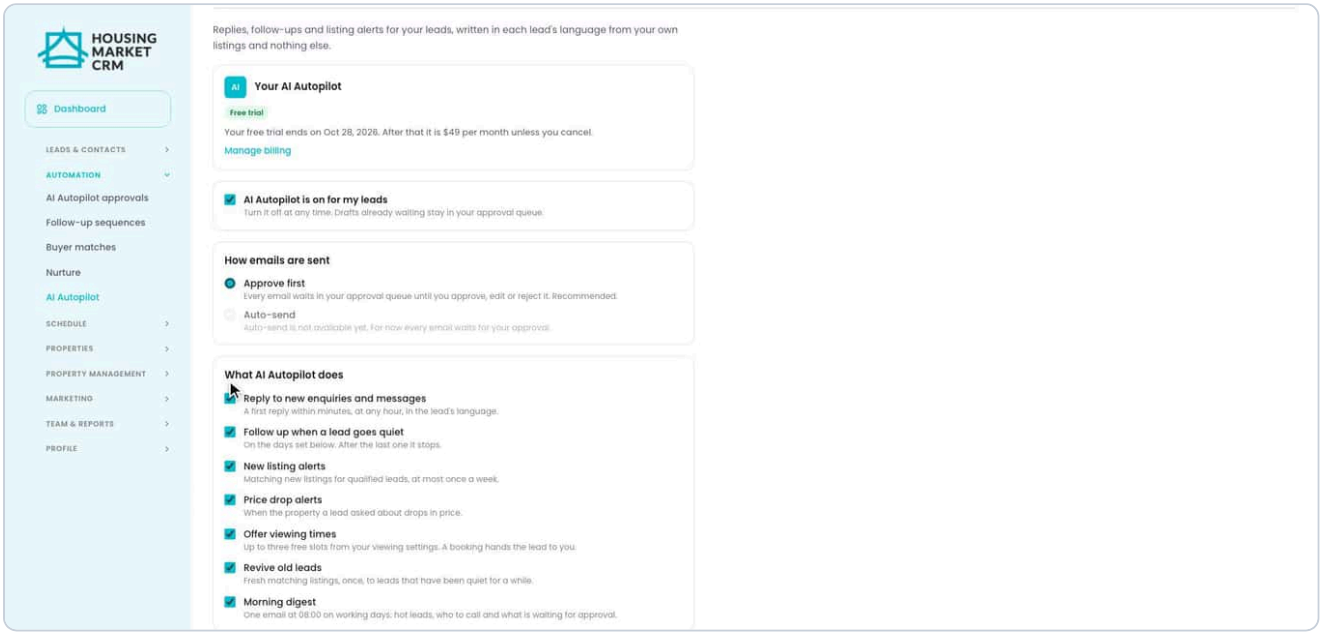


Figure 73.7 · Screen recorded 23 October 2026

8 The **morning digest**: one email at 08:00 on working days.

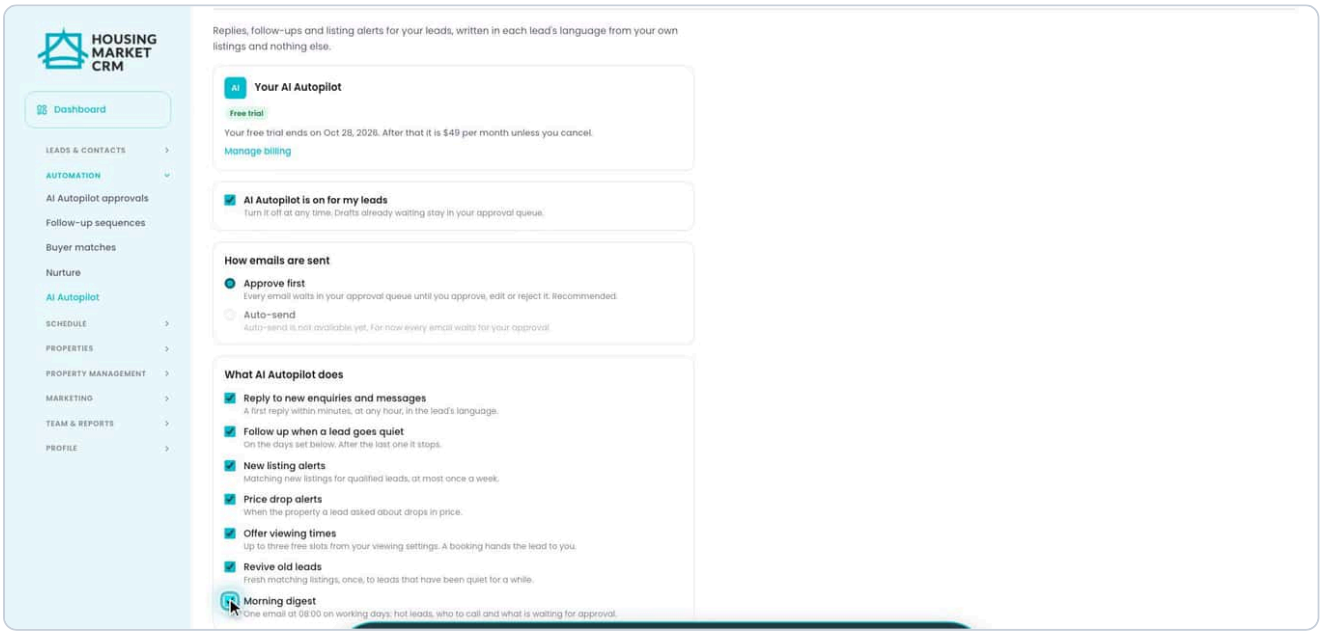


Figure 73.8 · Screen recorded 23 October 2026

9 Follow up after **2, 5 and 10** days, then it stops.

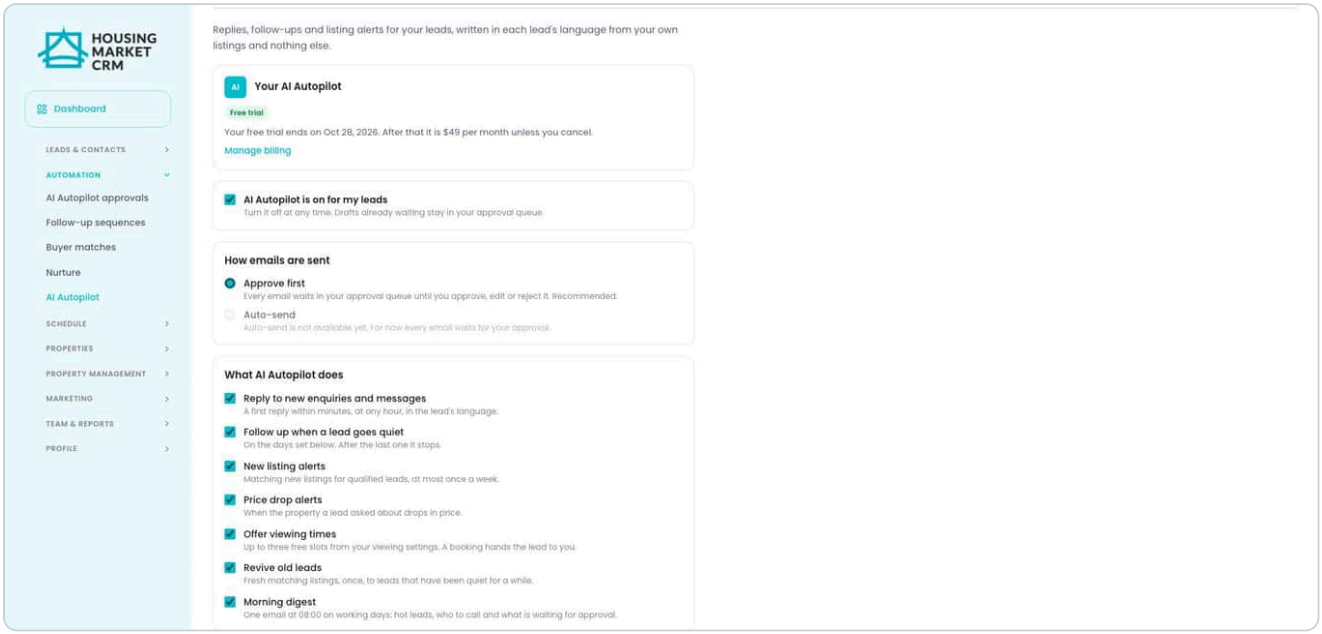


Figure 73.9 · Screen recorded 23 October 2026

10 Four **guardrails**, checked on **every** draft.

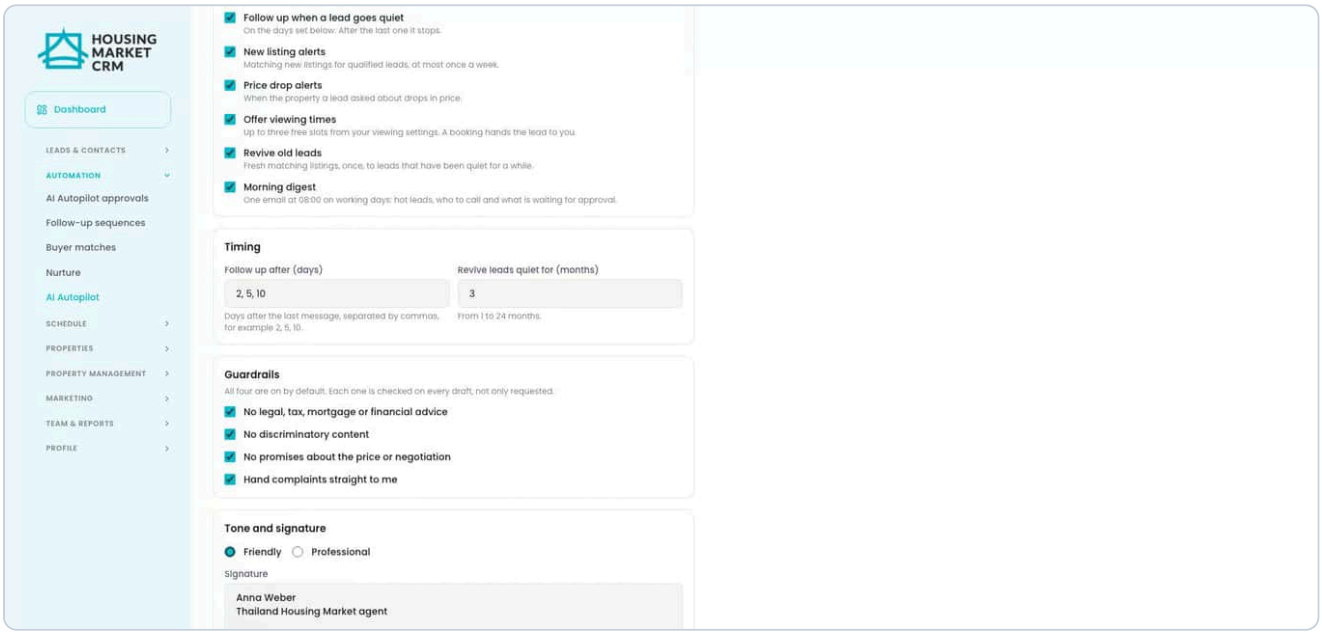


Figure 73.10 · Screen recorded 23 October 2026

11 No advice, no price promises. **Complaints come to you.**

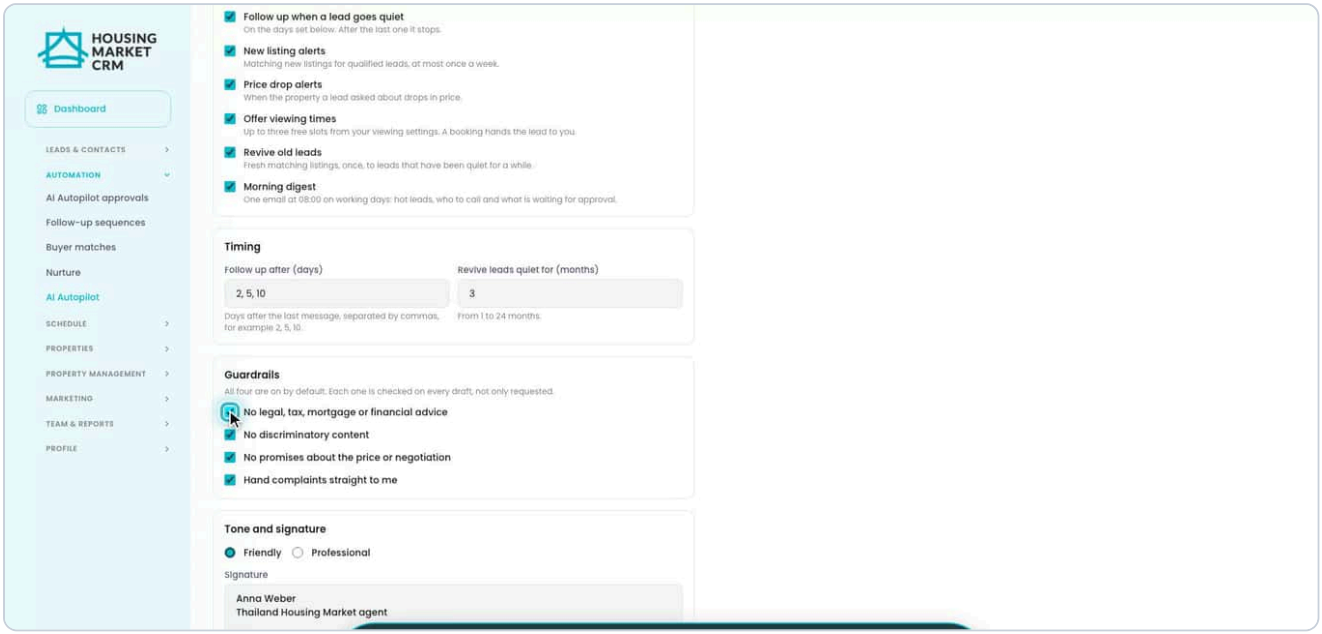


Figure 73.11 · Screen recorded 23 October 2026

12 Pick a **tone** and write your **signature**.

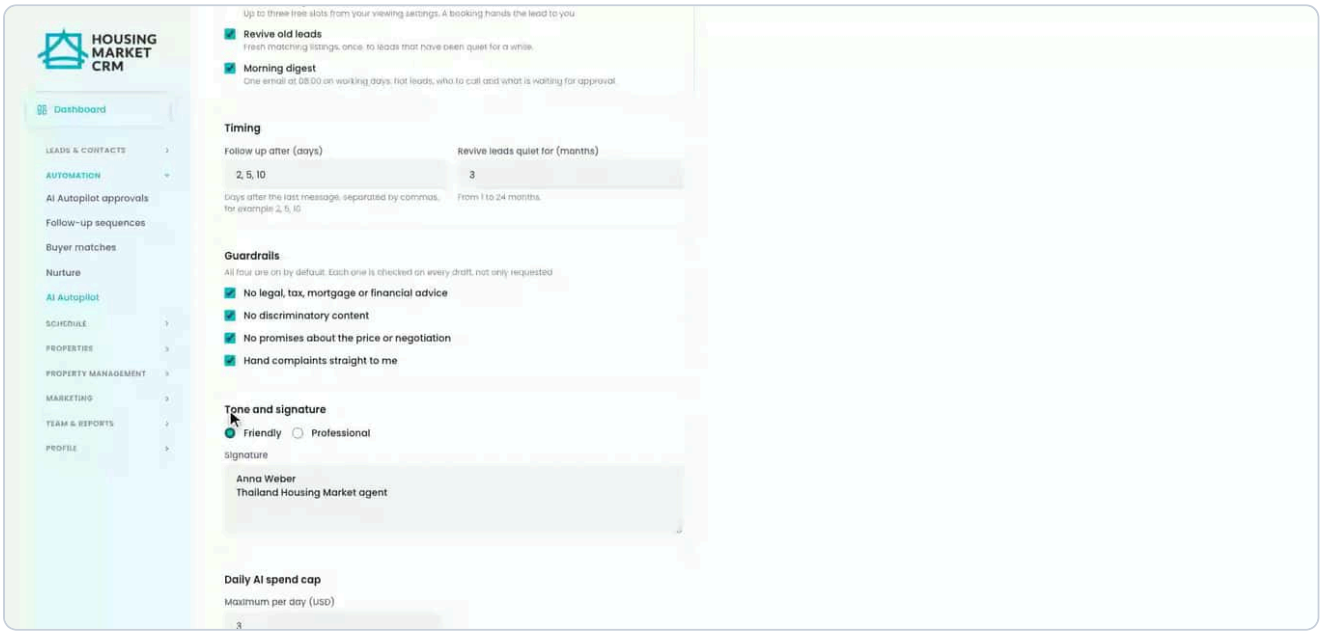


Figure 73.12 · Screen recorded 23 October 2026

13 A daily cap on what the AI may spend.

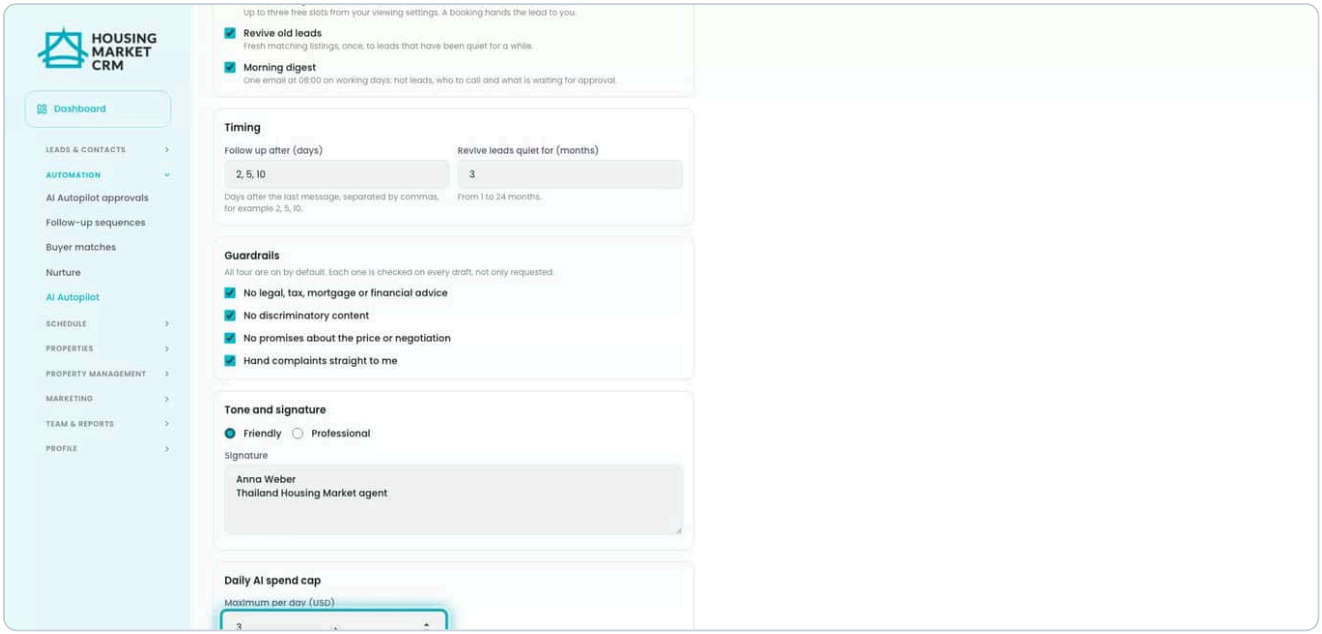


Figure 73.13 · Screen recorded 23 October 2026

14 Click Save settings.

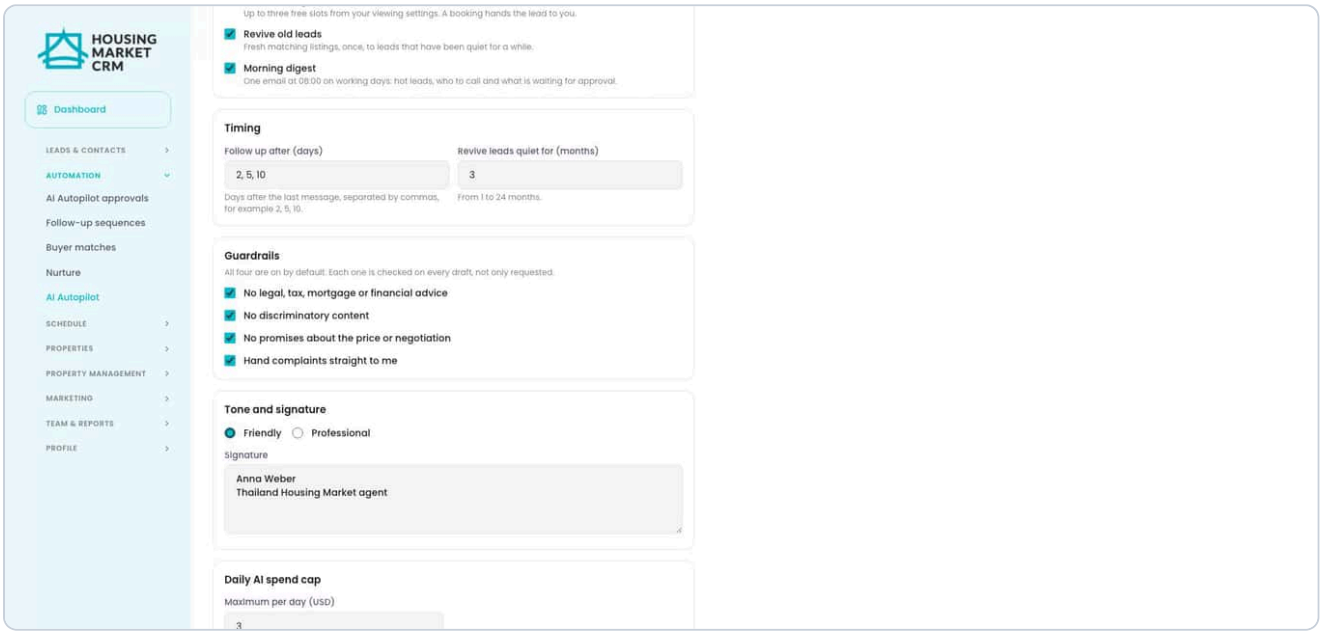


Figure 73.14 · Screen recorded 23 October 2026

GOOD TO KNOW

TIP

Only verified data: the property record, your own listings and the listings published on the Housing Market portals. When it does not know an answer, it says you will confirm and flags the question to you.

Help Center: What information does AI Autopilot use?

74 CHAPTER 74

Approve AI Autopilot replies

AI Autopilot add-on | For agents | Watch the video

OVERVIEW

By default nothing goes out until you approve it. It never sends one lead more than one Autopilot email a day, and it stops completely on a lead as soon as a person is needed.

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One email a day

A lead receives at most one AI Autopilot email per day. When several are due, a reply to the lead's own message comes first, then viewings and price drops, then new listings, then follow-ups; the rest wait for the next day.

From the Help Center: **What does AI Autopilot send, and when does it stop?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

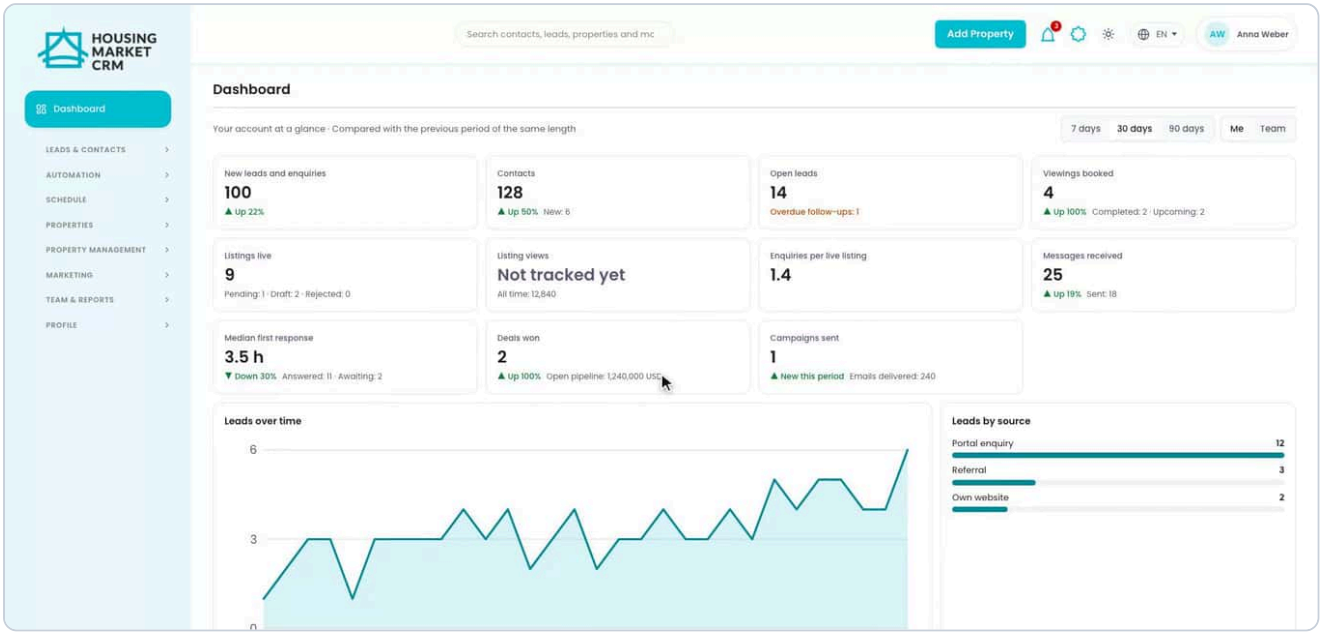


Figure 74.1 · Screen recorded 23 October 2026

2 Open **Automation** in the left menu.

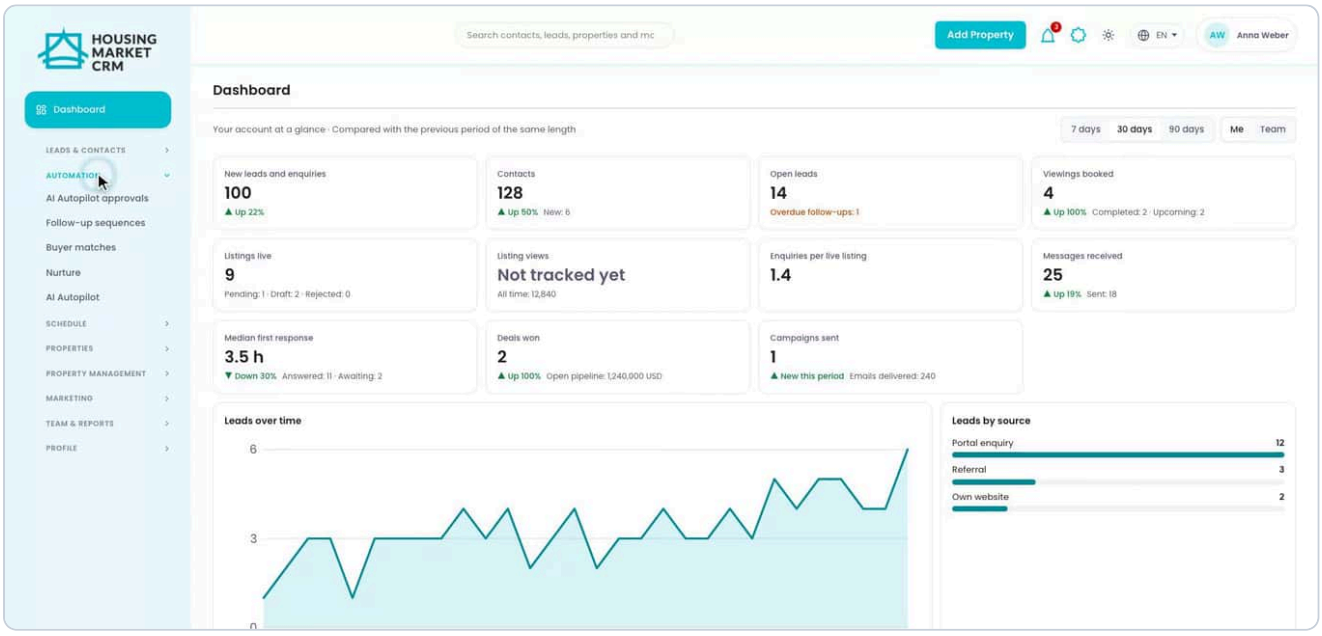


Figure 74.2 · Screen recorded 23 October 2026

3 Click **AI Autopilot approvals** in the left menu.

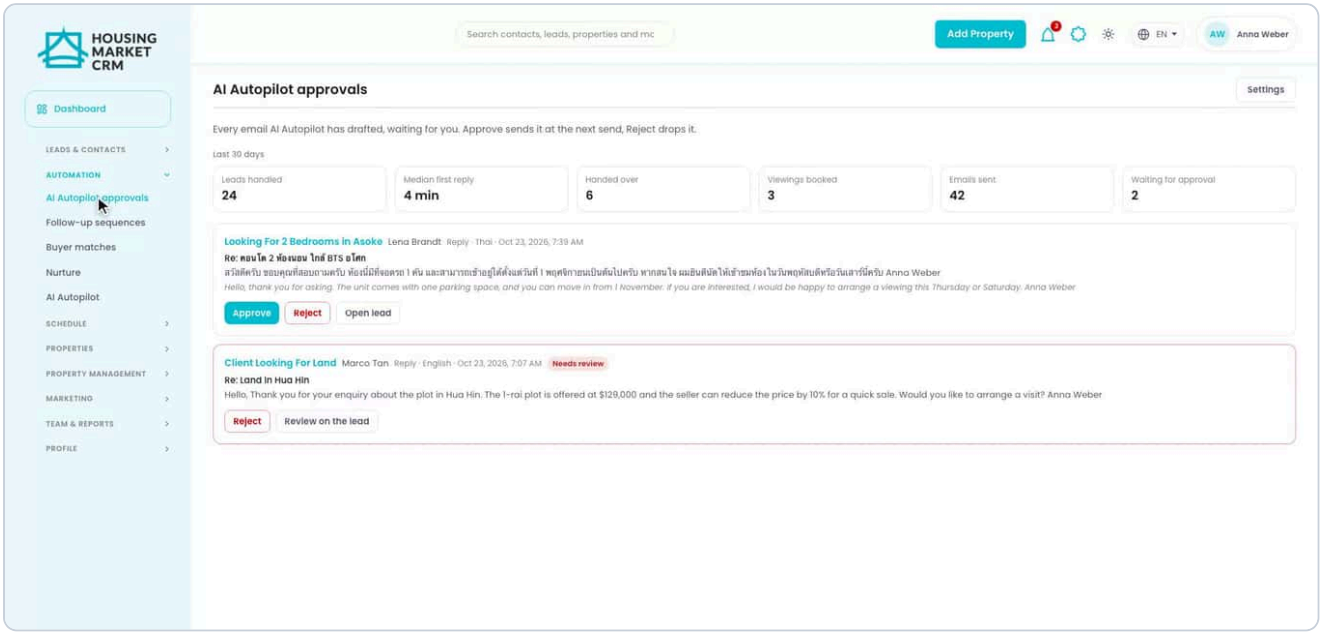


Figure 74.3 · Screen recorded 23 October 2026

4 The last **30 days**: leads handled, first reply, viewings booked.

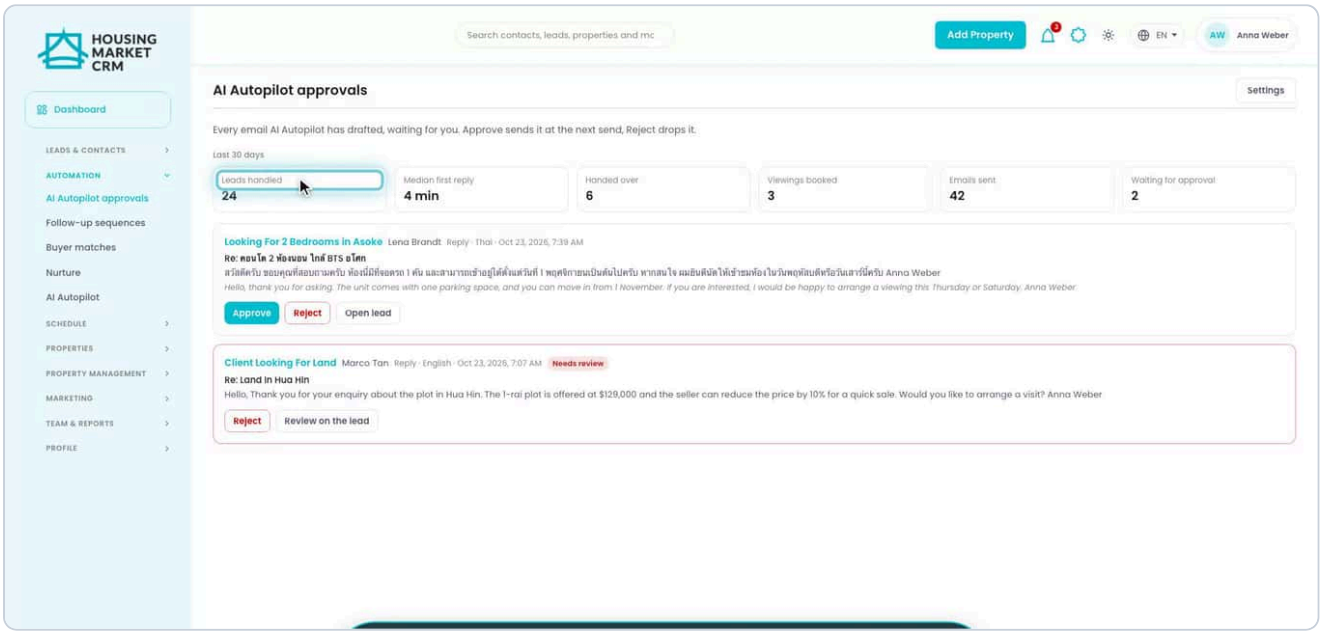


Figure 74.4 · Screen recorded 23 October 2026

5 Each draft, **waiting for you**.

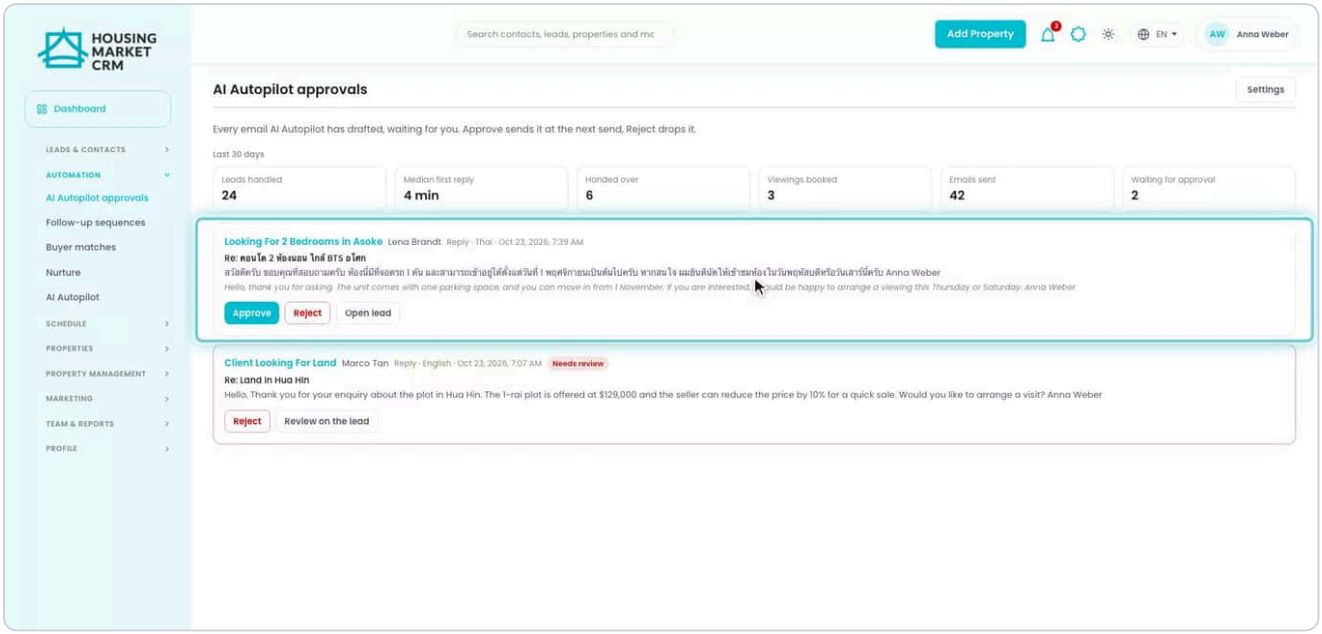


Figure 74.5 · Screen recorded 23 October 2026

6 Click **Approve**. It goes out at the next send.

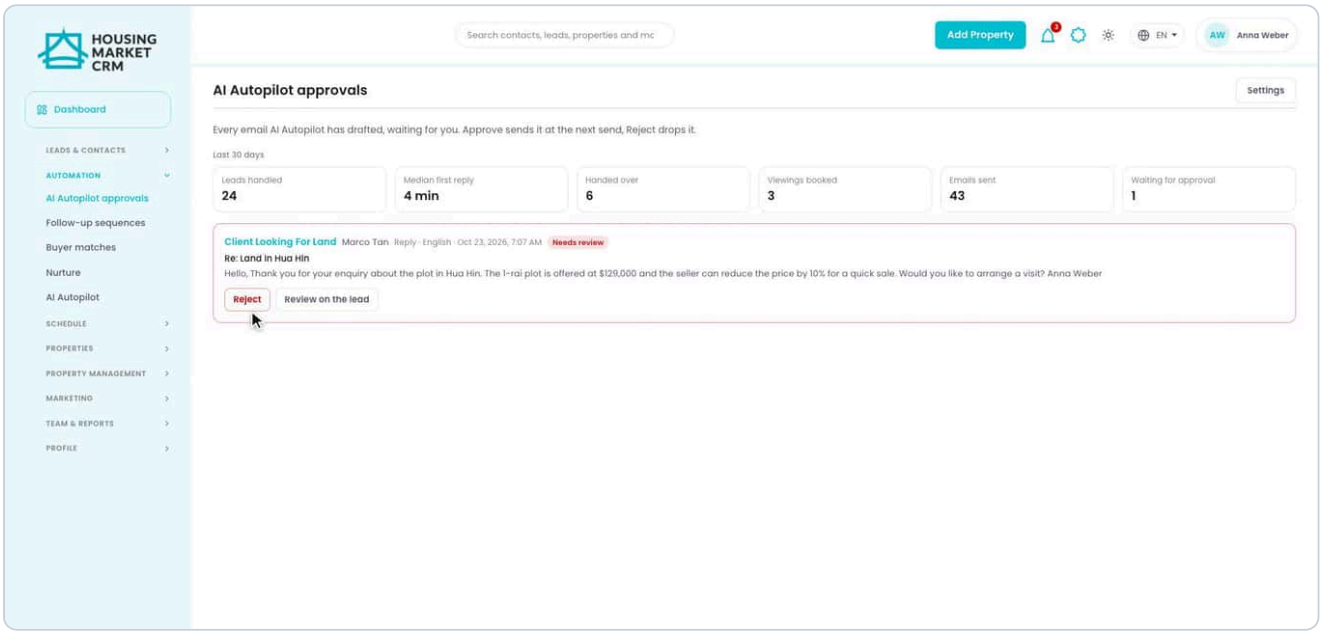


Figure 74.6 · Screen recorded 23 October 2026

7 This one is **held**: it states something not in your data.

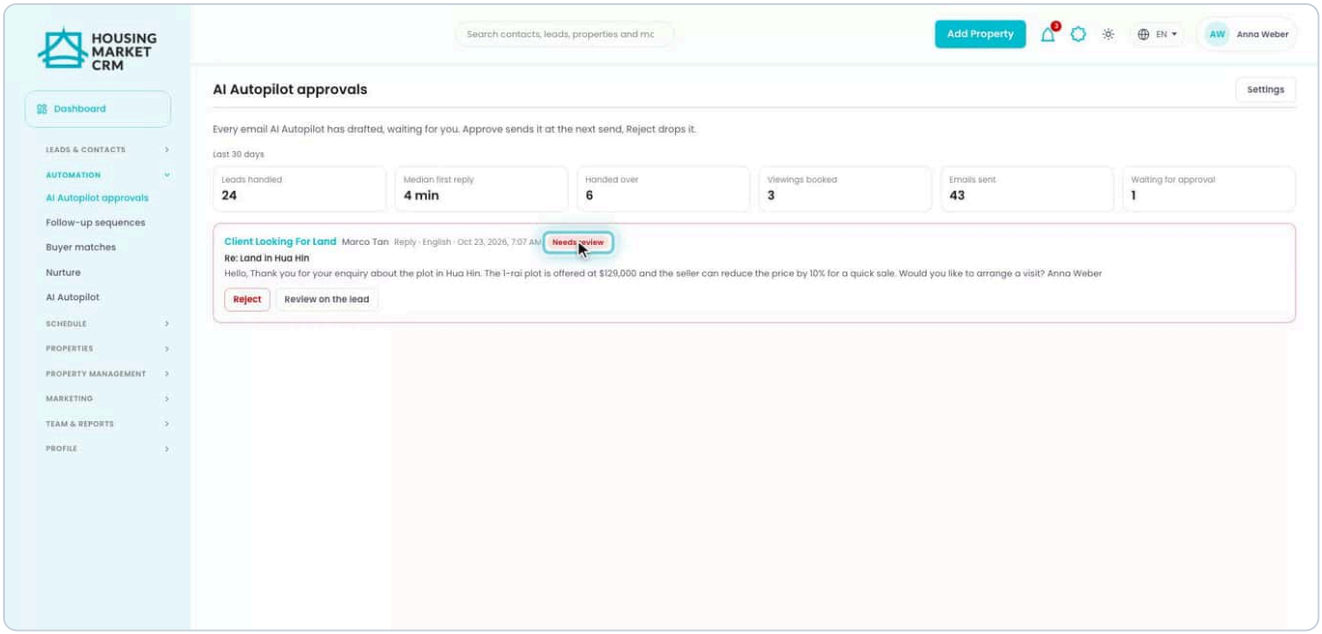


Figure 74.7 · Screen recorded 23 October 2026

8 Click **Review on the lead**.

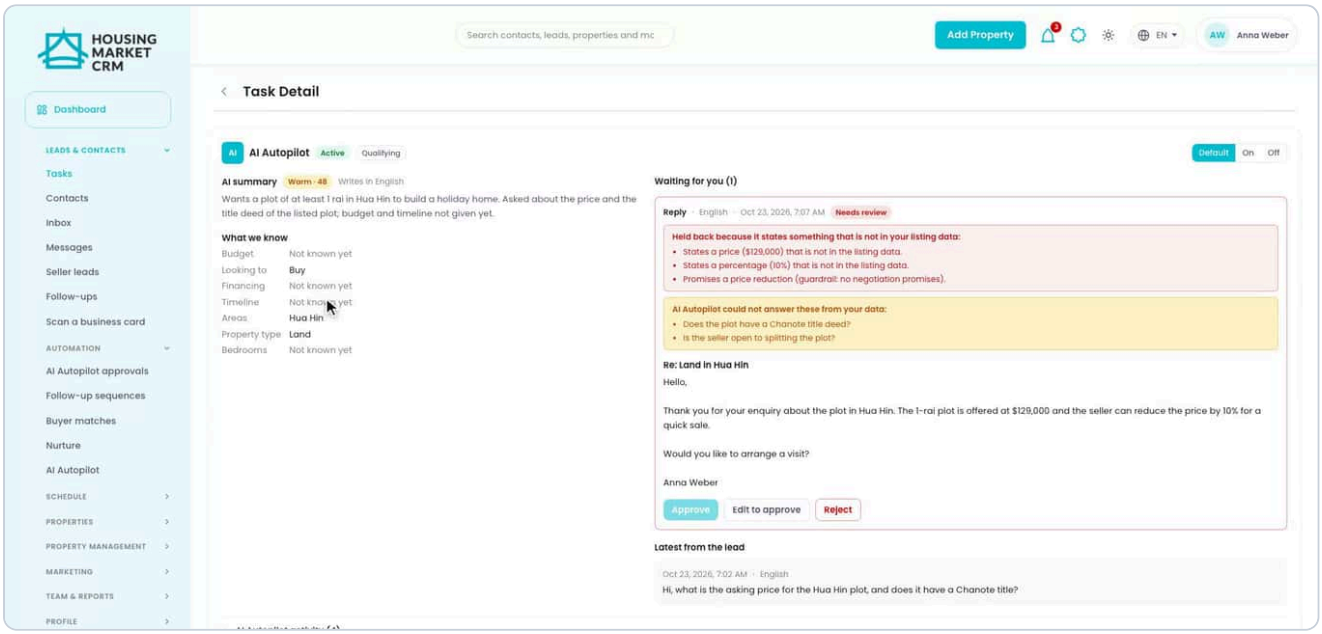


Figure 74.8 · Screen recorded 23 October 2026

9 Click **Edit to approve**.

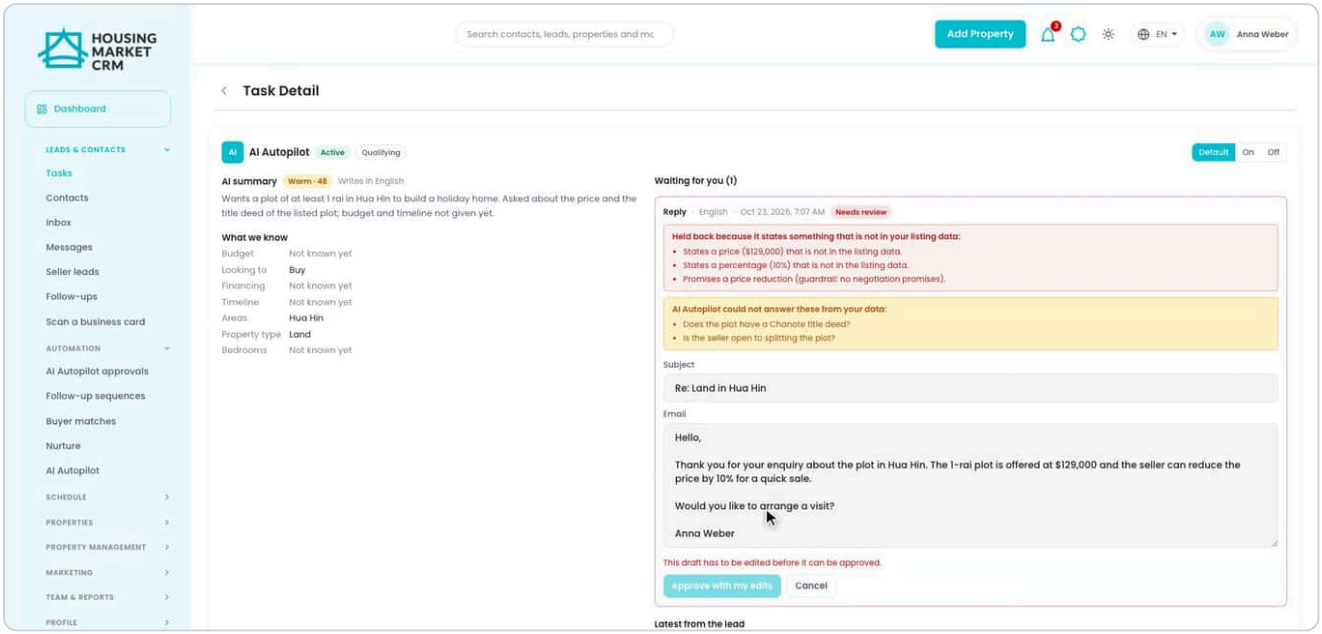


Figure 74.9 · Screen recorded 23 October 2026

10 Correct the text. This is exactly what the lead receives.

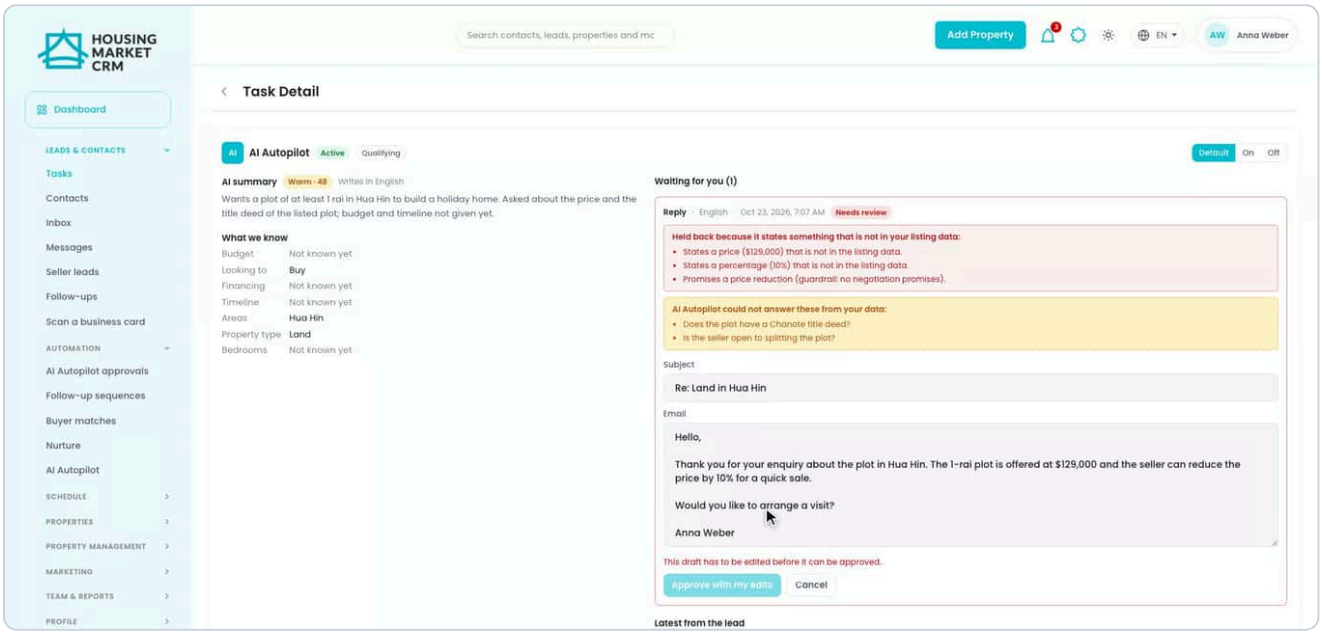


Figure 74.10 · Screen recorded 23 October 2026

11 Then **Approve with my edits.**

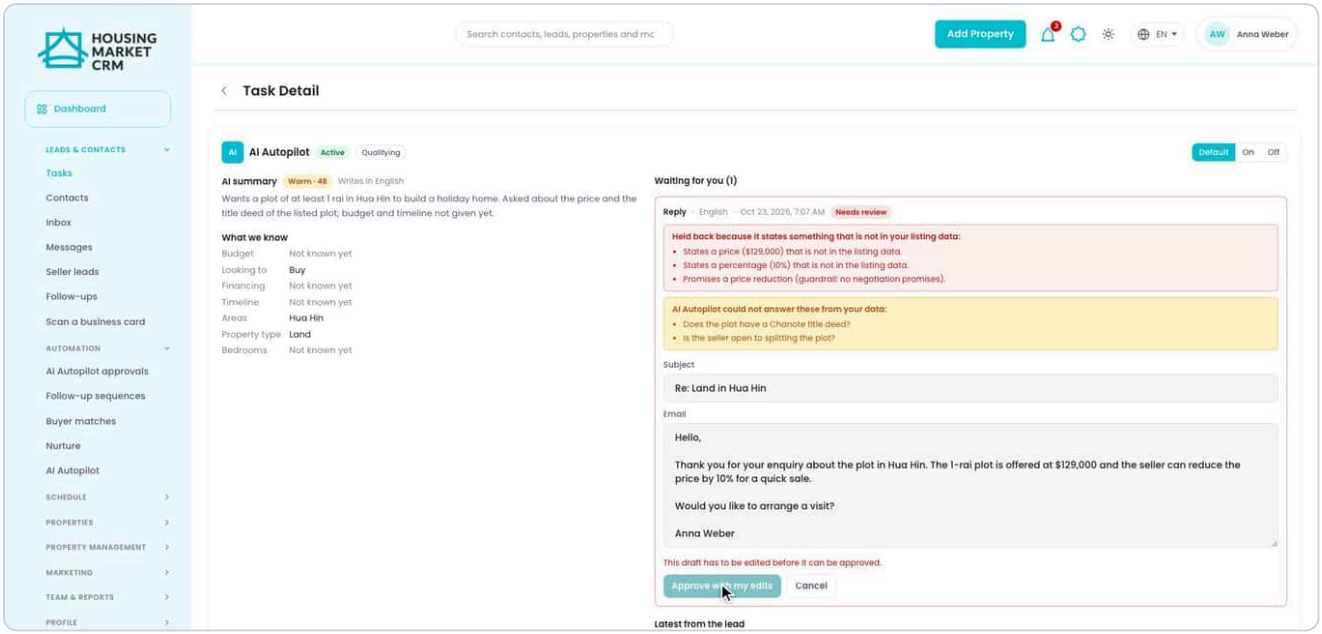


Figure 74.11 · Screen recorded 23 October 2026

GOOD TO KNOW

NOTE

Only verified data: the property record, your own listings and the listings published on the Housing Market portals. When it does not know an answer, it says you will confirm and flags the question to you.

Help Center: What information does AI Autopilot use?

75 CHAPTER 75

What AI Autopilot knows about a lead

AI Autopilot add-on | For agents | Watch the video

OVERVIEW

A paid add-on for Housing Market CRM that drafts replies to new enquiries in your name, qualifies the lead, follows up and hands the lead to you as soon as a person is needed.

In the CRM it is called AI Autopilot. When a new enquiry arrives from a property contact form, or a lead it is handling writes back, it drafts a reply in your name and in the enquirer's language.

Through the conversation it records the budget, timeline, purpose, financing status, preferred areas and property type on the lead, keeps a short summary and score up to date, suggests other matching listings, offers viewing times from your availability, follows up when a lead goes quiet and moves the lead between your existing pipeline stages. Every action is logged on the lead with the time and the reason.

It works on leads in markets where replies to your emails can be captured in the CRM; where that is not yet the case, the lead file says so.

From the Help Center: **What is Housing Market CRM AI Autopilot?**

STEP BY STEP

1 Open a lead from your board.

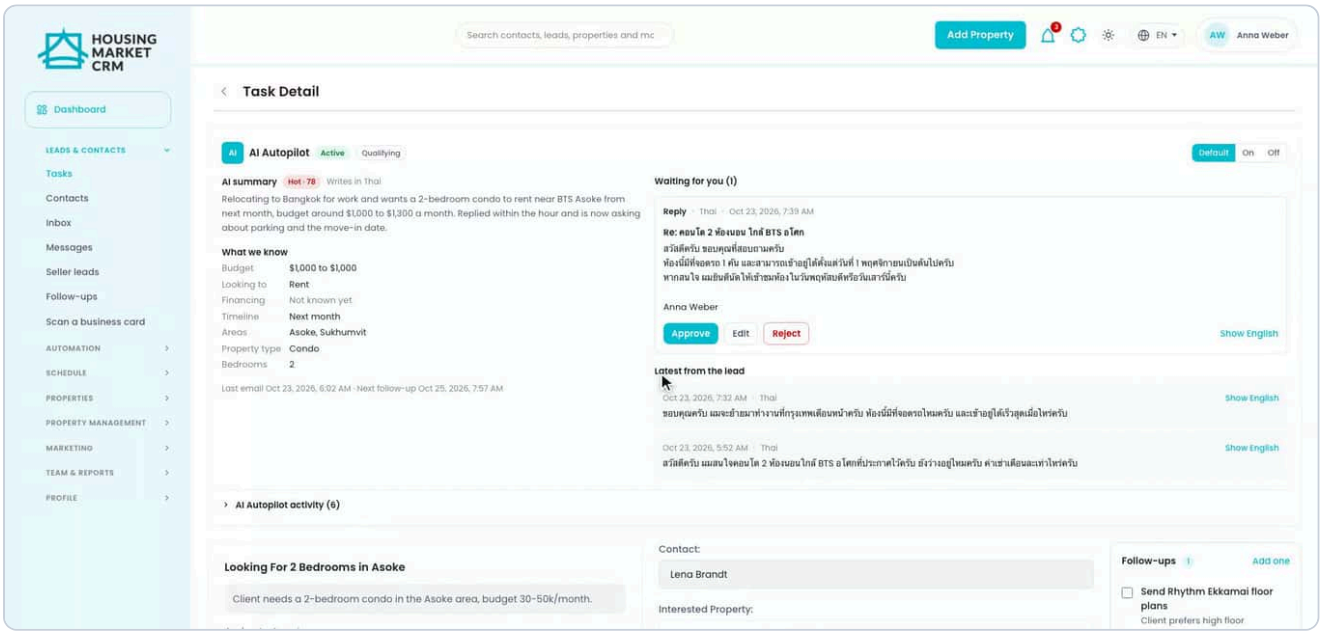


Figure 75.1 · Screen recorded 23 October 2026

2 The **AI Autopilot** panel, at the top of the lead.

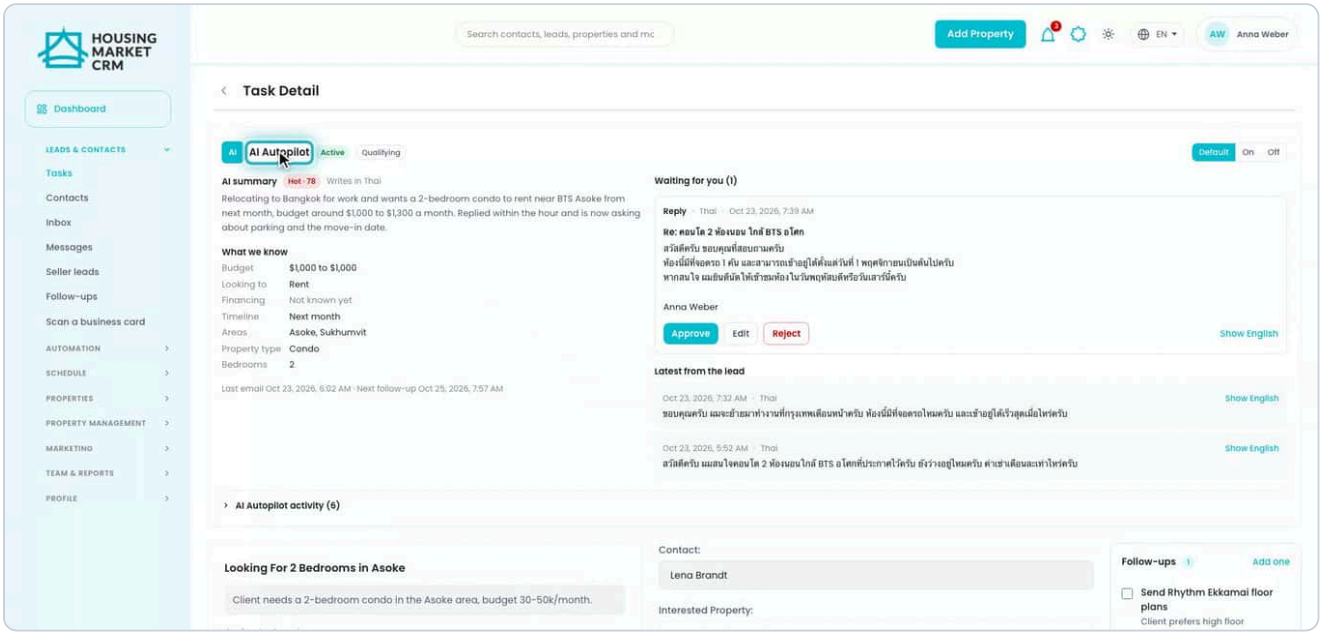


Figure 75.2 · Screen recorded 23 October 2026

3 A short **summary**, and how serious the lead looks.

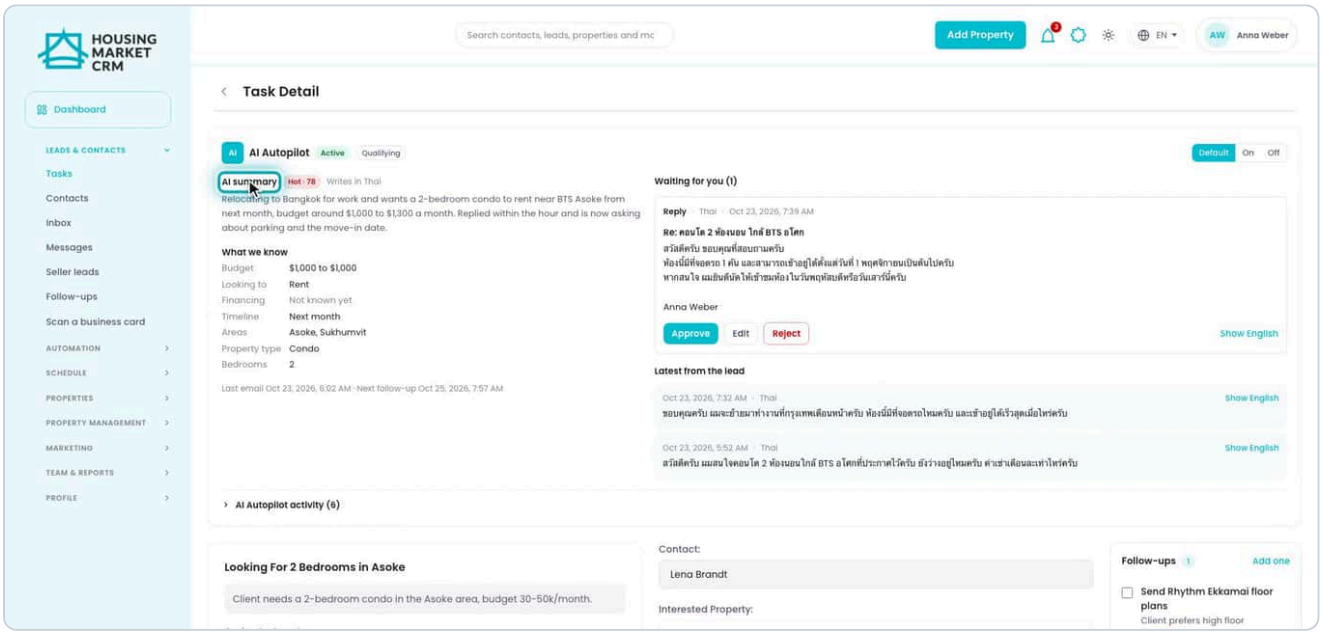


Figure 75.3 · Screen recorded 23 October 2026

4 **Budget, timing, area**: filled in as the lead answers.

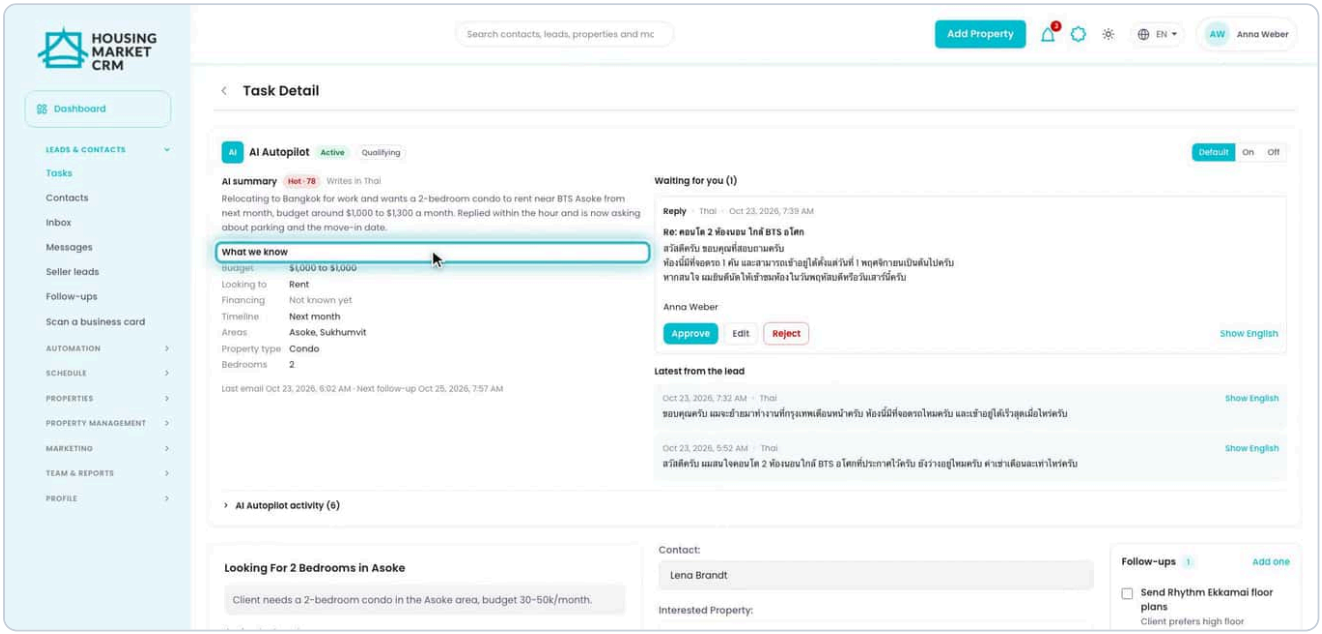


Figure 75.4 · Screen recorded 23 October 2026

5 Click **Show English** to read the draft.

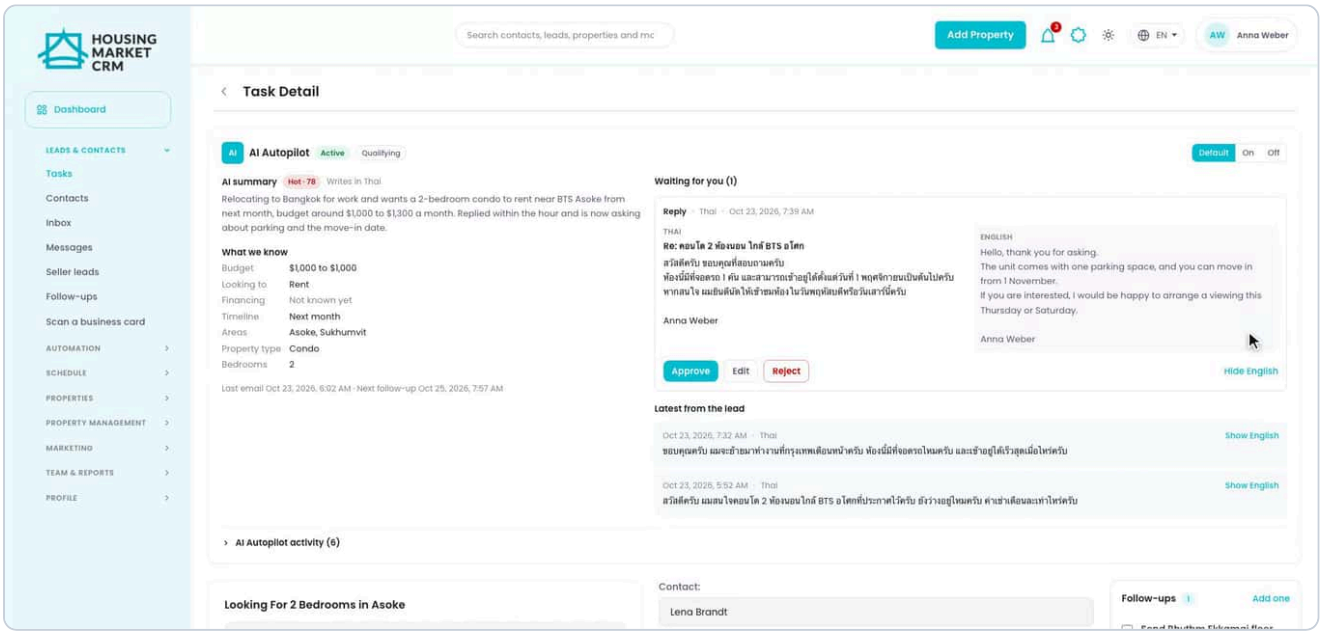


Figure 75.5 · Screen recorded 23 October 2026

6 It writes in the **lead's language**. You read it in English.

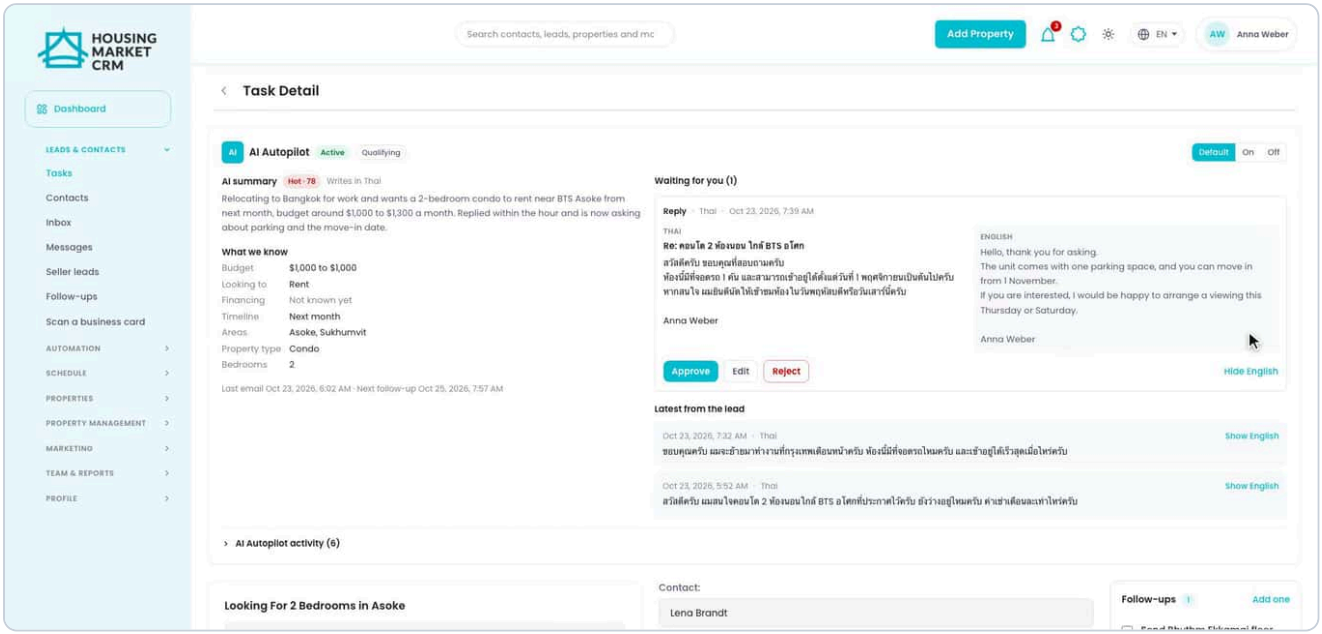


Figure 75.6 · Screen recorded 23 October 2026

7 Click **Approve**.

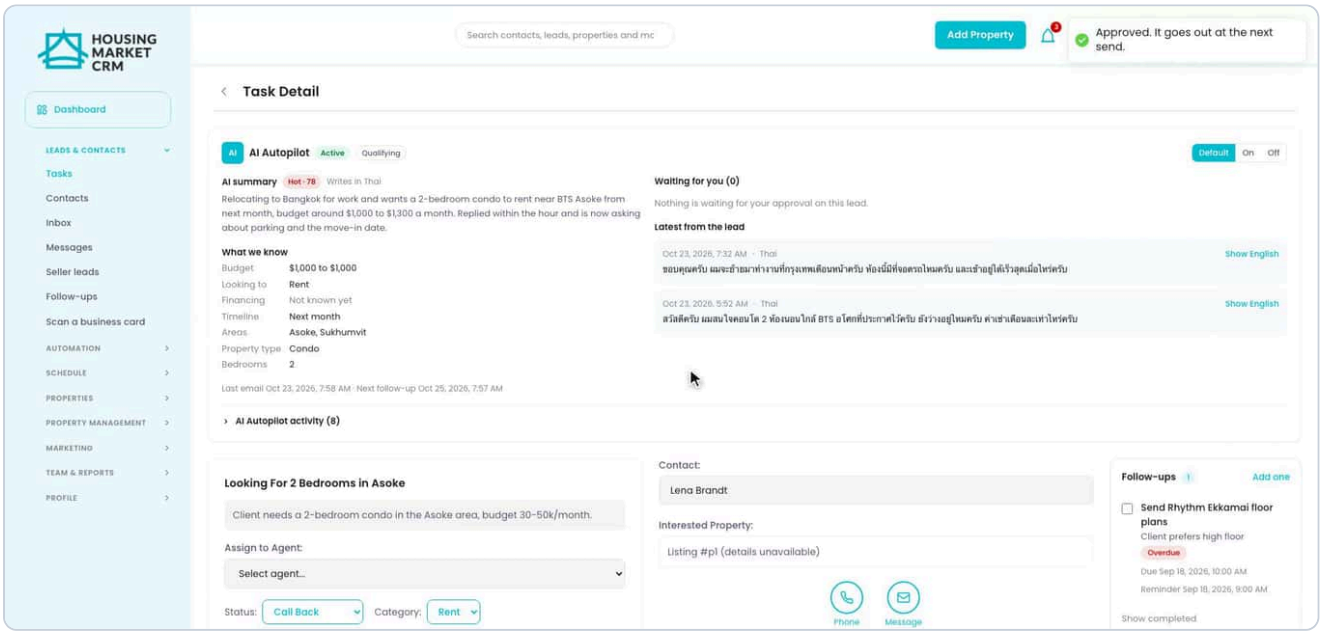


Figure 75.7 · Screen recorded 23 October 2026

8 **Default, On or Off** — for this lead only.

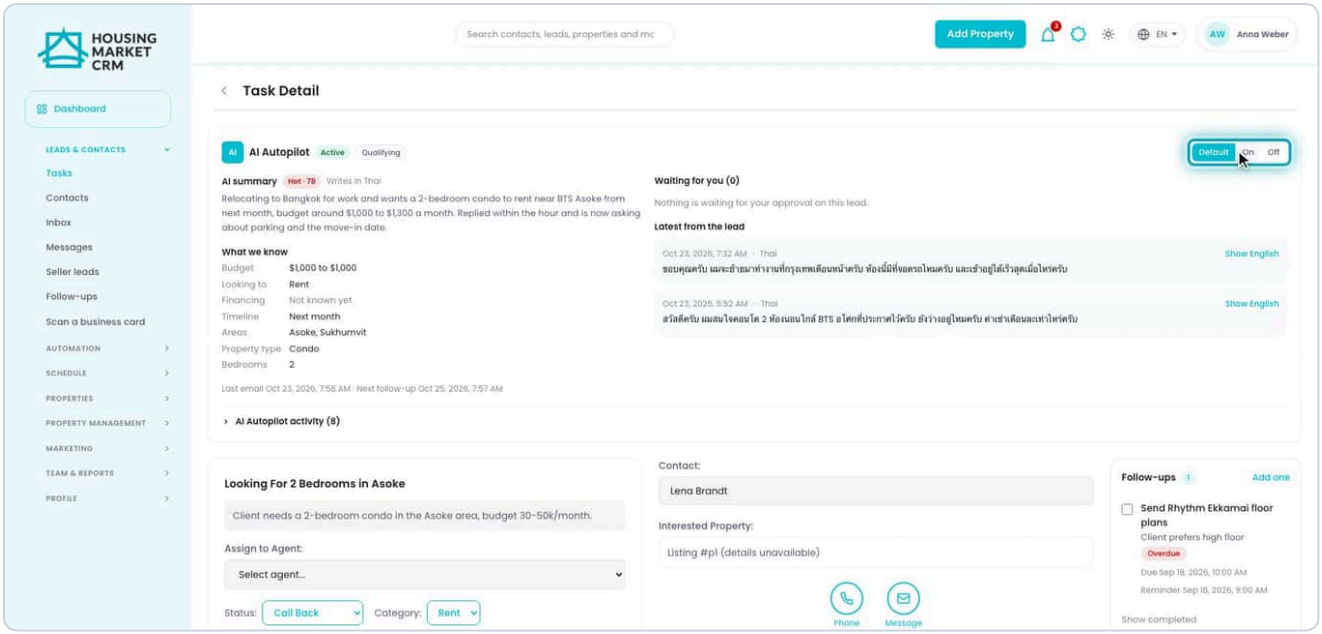


Figure 75.8 · Screen recorded 23 October 2026

9 Open the **activity** to see everything it did.

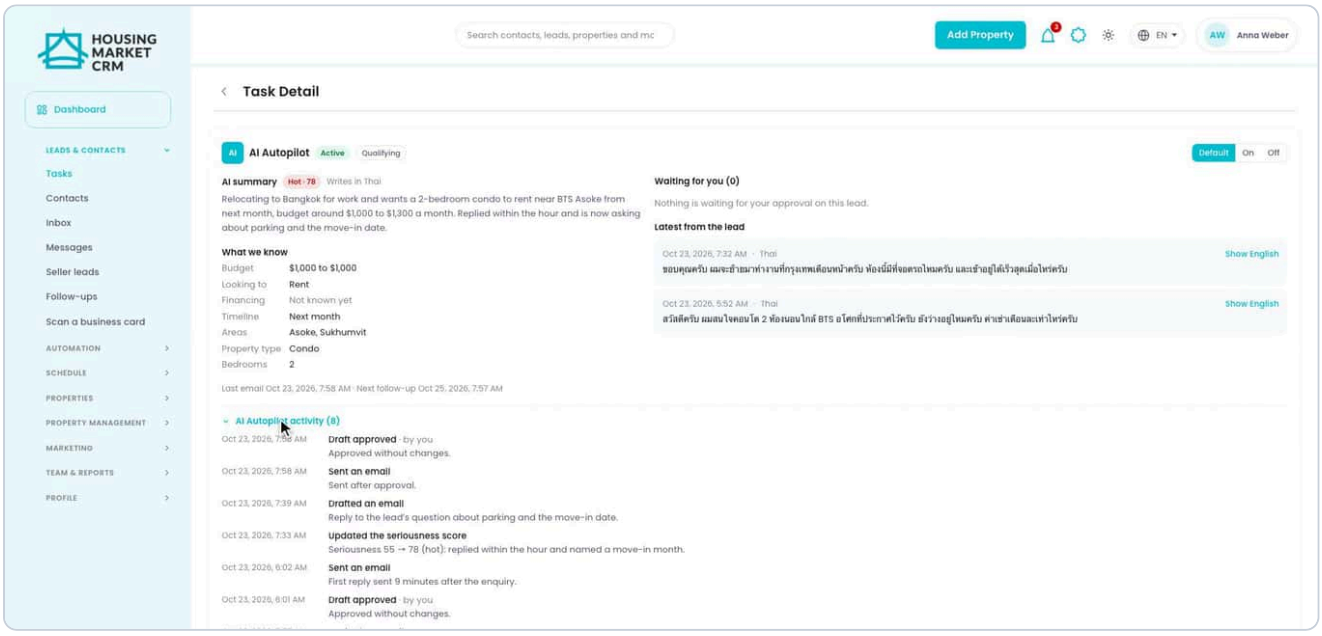


Figure 75.9 · Screen recorded 23 October 2026

GOOD TO KNOW

NOTE

In the lead's own language, in any of the seventeen languages Housing Market supports. In the CRM you see an English translation beside each draft and each message from the lead.

Help Center: Which languages does AI Autopilot reply in?

RELATED HELP CENTER ARTICLES

How does lead scoring work?	faq.housingmarketgroup.com/faq/how-does-lead-scoring-work
What can I do on a lead's page?	faq.housingmarketgroup.com/faq/what-can-i-do-on-a-leads-page

76 CHAPTER 76

Handover and the morning digest

AI Autopilot add-on | For agents | Watch the video

OVERVIEW

By default nothing goes out until you approve it. It never sends one lead more than one Autopilot email a day, and it stops completely on a lead as soon as a person is needed.

Every draft waits for your approval in the lead file and in the approval queue, where you can approve it, edit it or reject it.

It hands the lead over

AI Autopilot stops completely on a lead, and tells you in the CRM and by email with its summary at the top of the lead, when:

- you reply to the lead yourself
- the lead asks for a viewing
- the lead makes an offer
- the lead asks it to stop or unsubscribes

You can also switch it off or on for any single lead.

One email a day

A lead receives at most one AI Autopilot email per day. When several are due, a reply to the lead's own message comes first, then viewings and price drops, then new listings, then follow-ups; the rest wait for the next day.

From the Help Center: **What does AI Autopilot send, and when does it stop?**

STEP BY STEP

1 Open a lead AI Autopilot has been working.

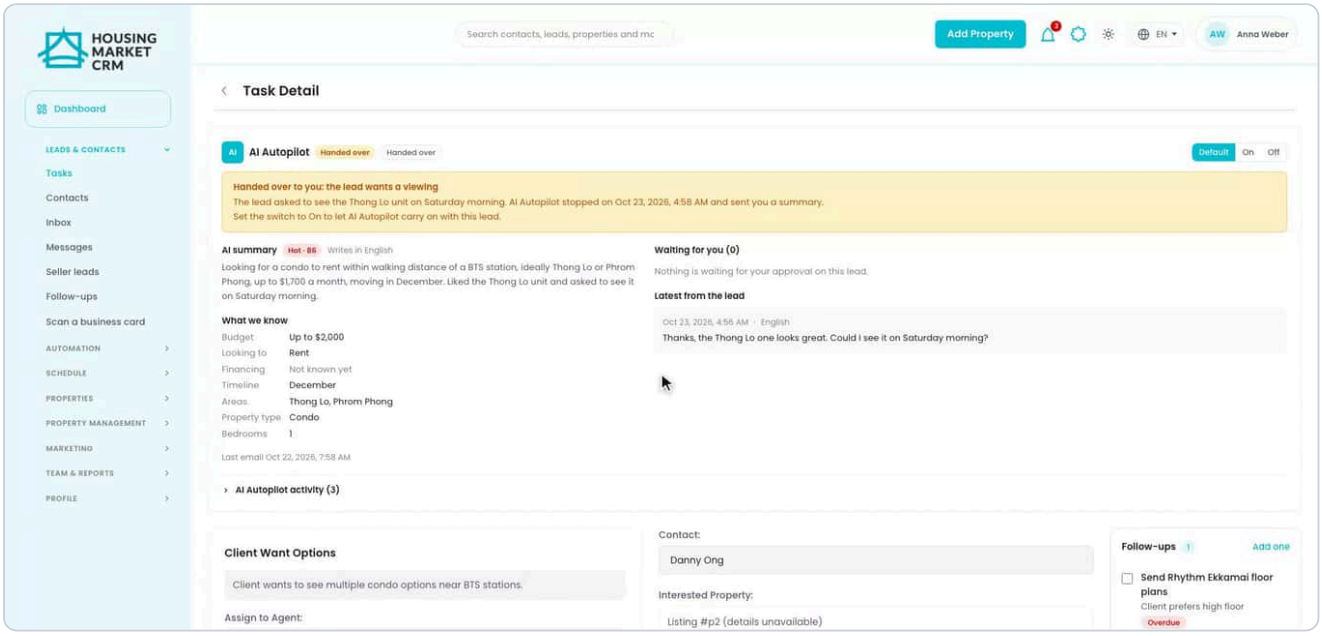


Figure 76.1 · Screen recorded 23 October 2026

2 **Handed over to you**: the lead wants a viewing.

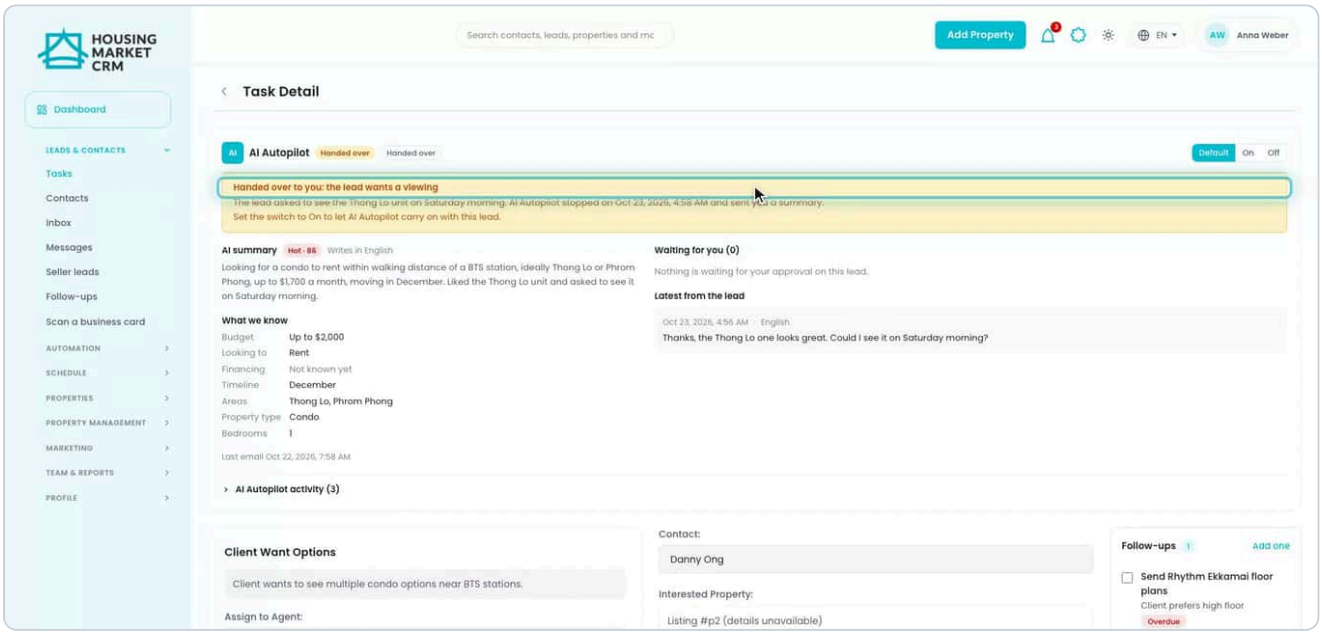


Figure 76.2 · Screen recorded 23 October 2026

3 It stops at once and sends you a **summary**.

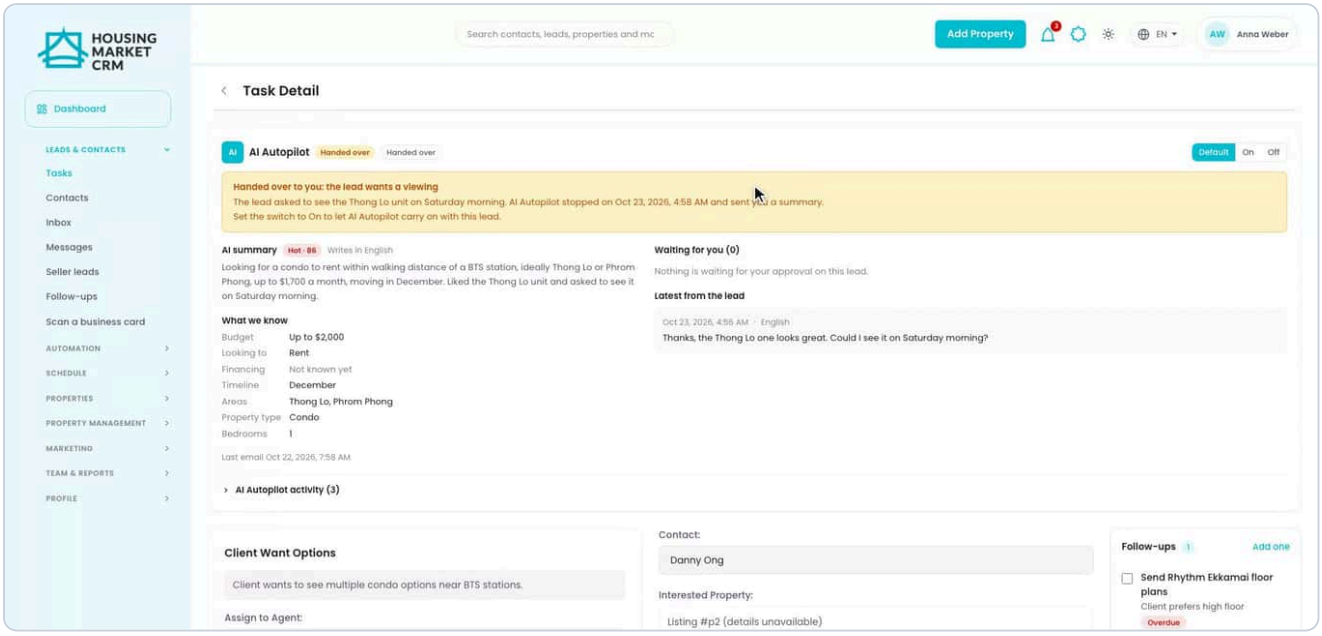


Figure 76.3 · Screen recorded 23 October 2026

4 A viewing, an offer, a complaint, or **you replying** — each one hands over.

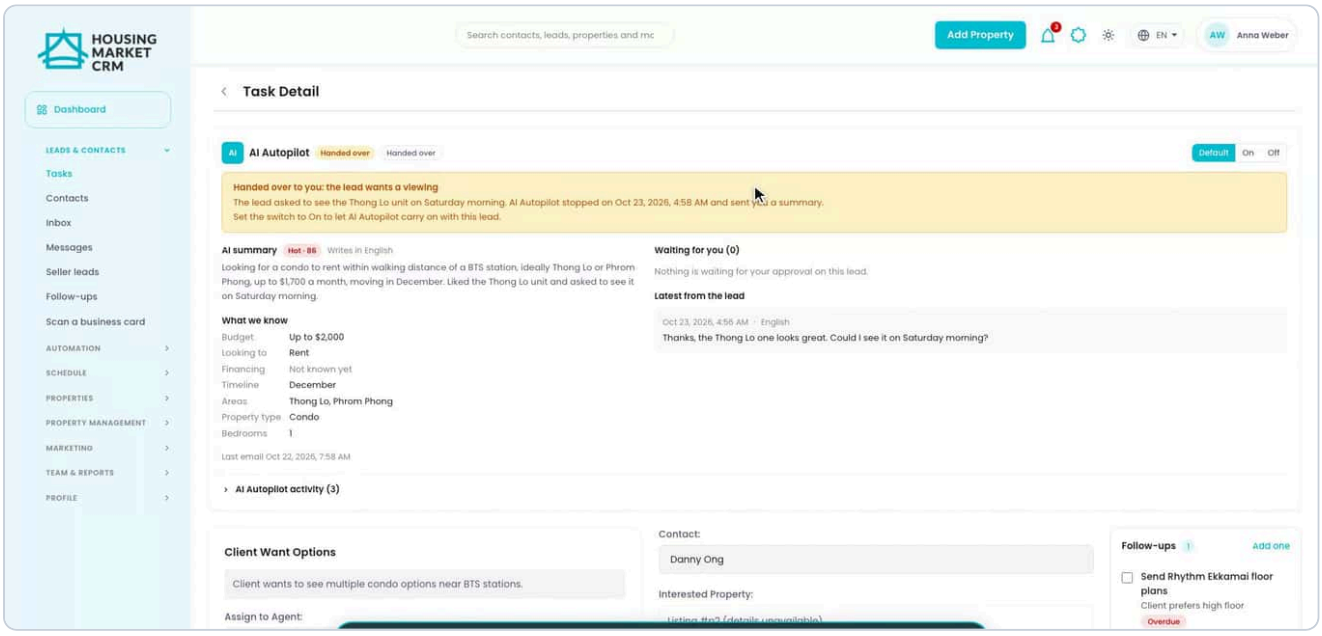


Figure 76.4 · Screen recorded 23 October 2026

5 Set the switch to **On** to let it carry on.

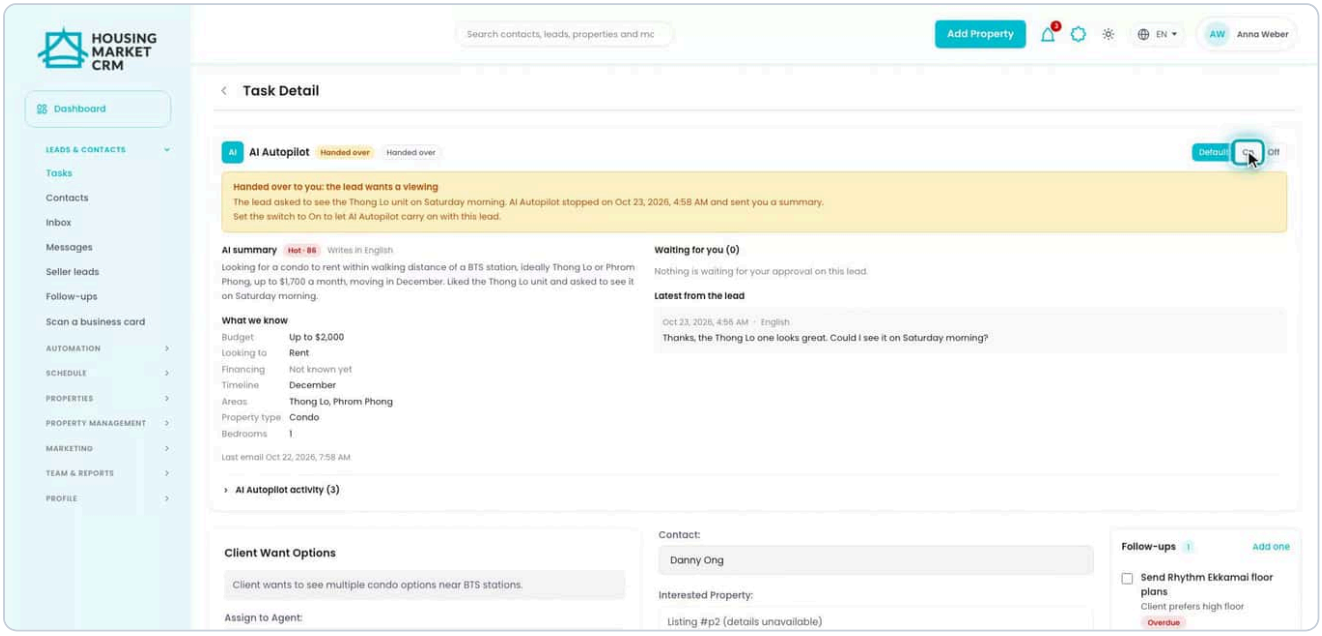


Figure 76.5 · Screen recorded 23 October 2026

6 Open **Automation** in the left menu.

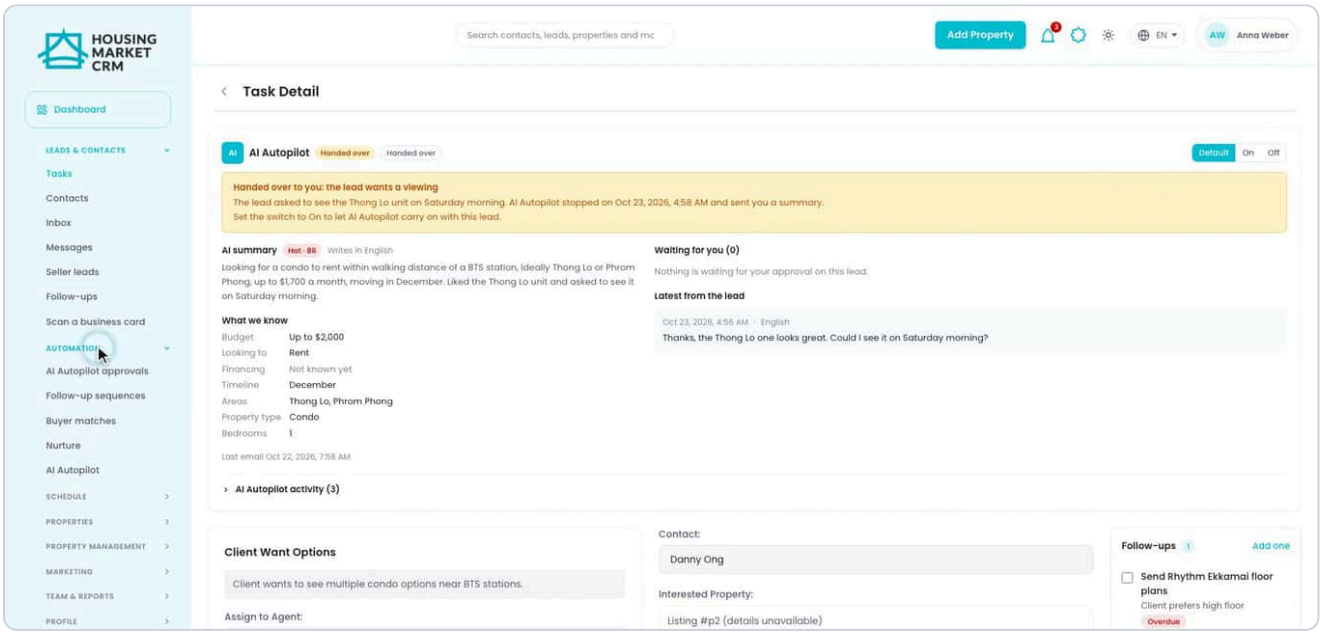


Figure 76.6 · Screen recorded 23 October 2026

7 Open **AI Autopilot** in the left menu.

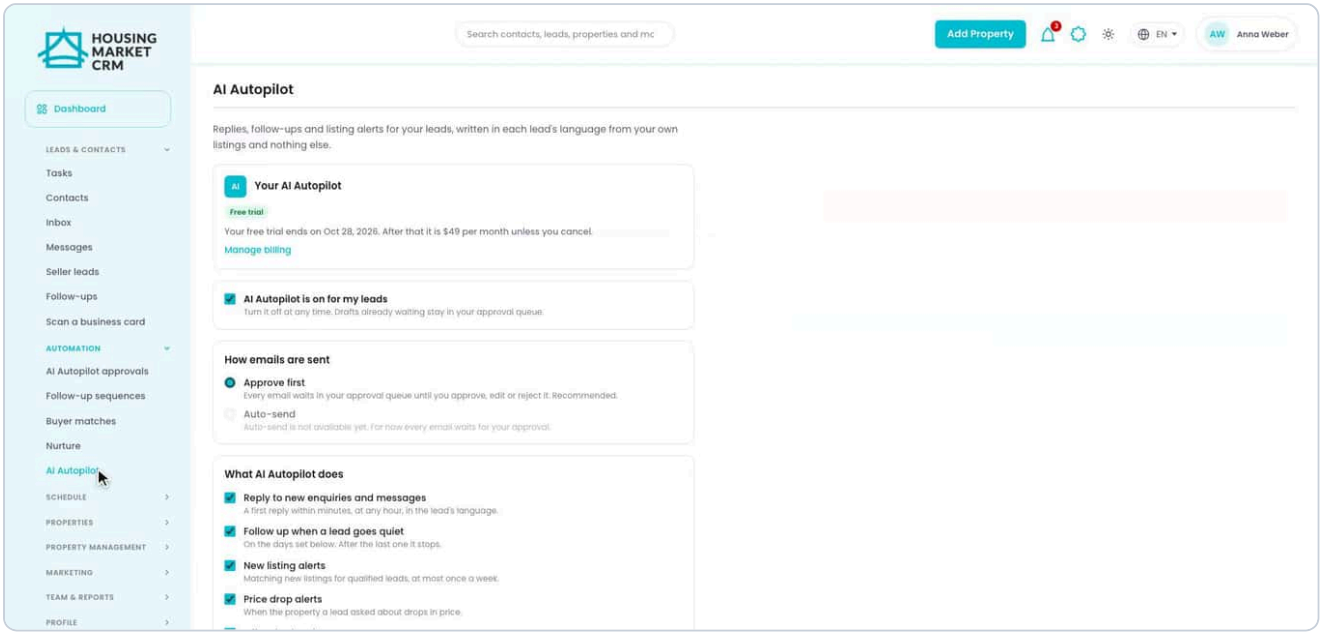


Figure 76.7 · Screen recorded 23 October 2026

8 One email at **08:00** on working days: hot leads, calls, approvals.

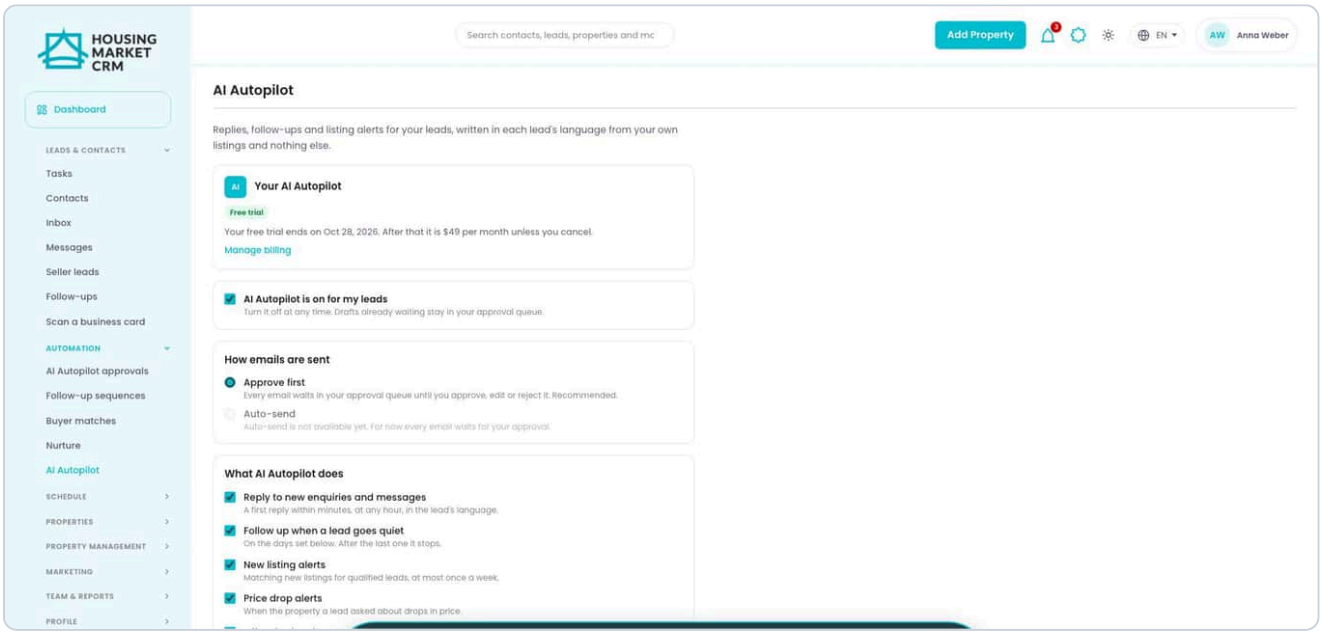


Figure 76.8 · Screen recorded 23 October 2026

GOOD TO KNOW

NOTE

A paid add-on for Housing Market CRM that drafts replies to new enquiries in your name, qualifies the lead, follows up and hands the lead to you as soon as a person is needed.

Help Center: What is Housing Market CRM AI Autopilot?

77 CHAPTER 77

AI Autopilot: overview

Paid add-on | For agents | Watch the video

OVERVIEW

A paid add-on for Housing Market CRM that drafts replies to new enquiries in your name, qualifies the lead, follows up and hands the lead to you as soon as a person is needed.

In the CRM it is called AI Autopilot. When a new enquiry arrives from a property contact form, or a lead it is handling writes back, it drafts a reply in your name and in the enquirer's language.

Through the conversation it records the budget, timeline, purpose, financing status, preferred areas and property type on the lead, keeps a short summary and score up to date, suggests other matching listings, offers viewing times from your availability, follows up when a lead goes quiet and moves the lead between your existing pipeline stages. Every action is logged on the lead with the time and the reason.

It works on leads in markets where replies to your emails can be captured in the CRM; where that is not yet the case, the lead file says so.

From the Help Center: **What is Housing Market CRM AI Autopilot?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

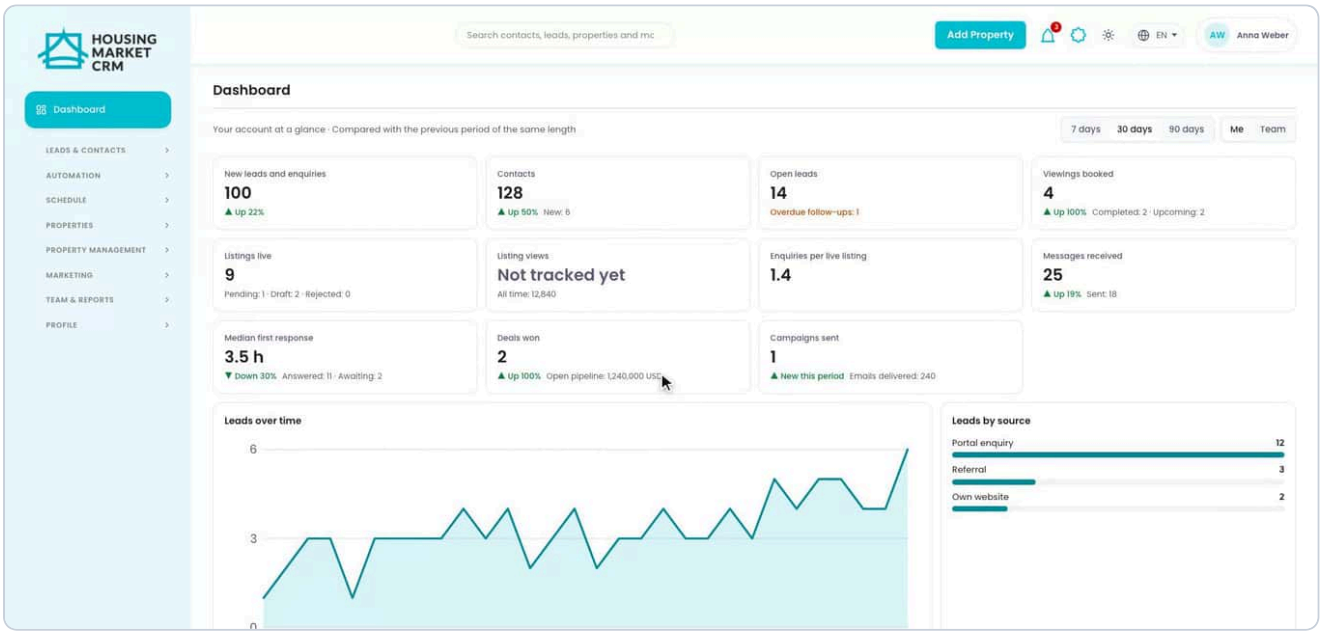


Figure 77.1 · Screen recorded 4 November 2026

2 Open **Automation** in the left menu.

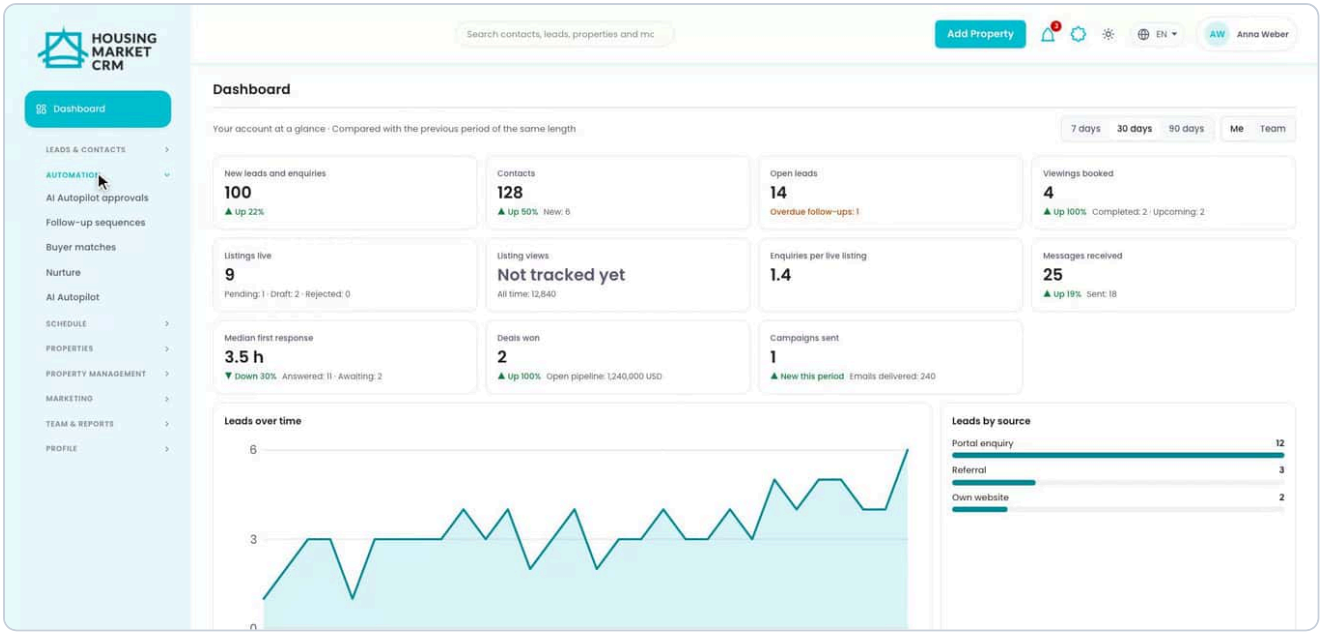


Figure 77.2 · Screen recorded 4 November 2026

3 Click **AI Autopilot**.

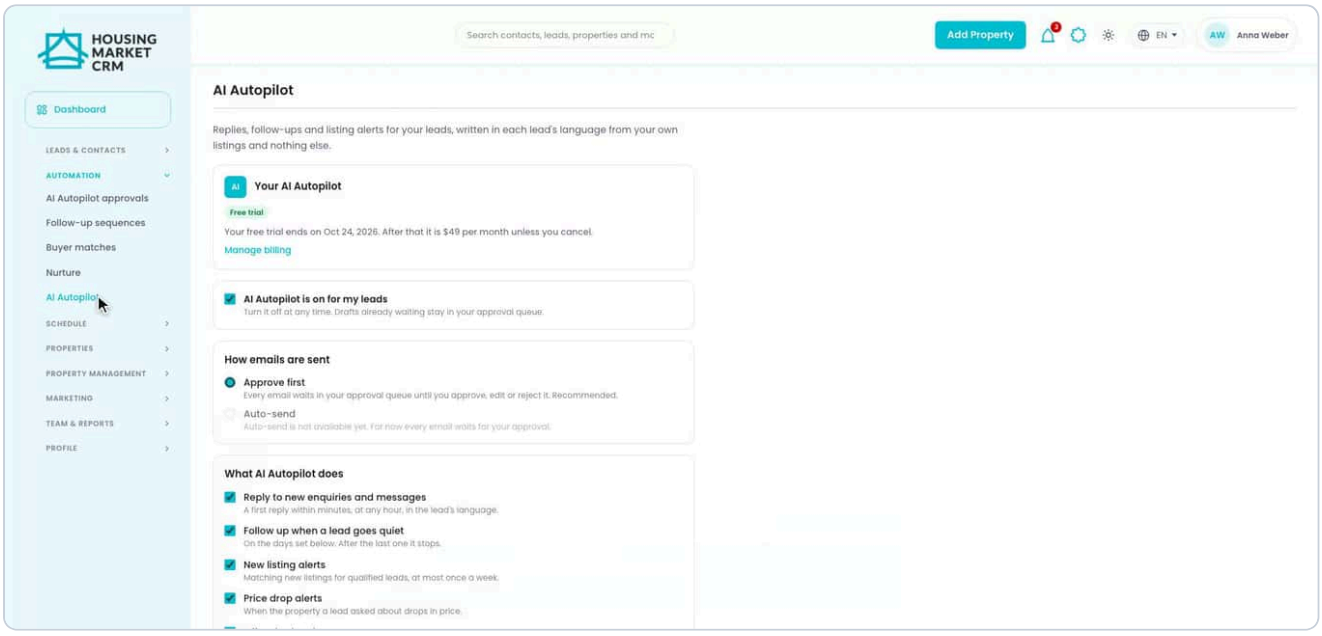


Figure 77.3 · Screen recorded 4 November 2026

4 A **7-day free trial**, then **$49 per month**.

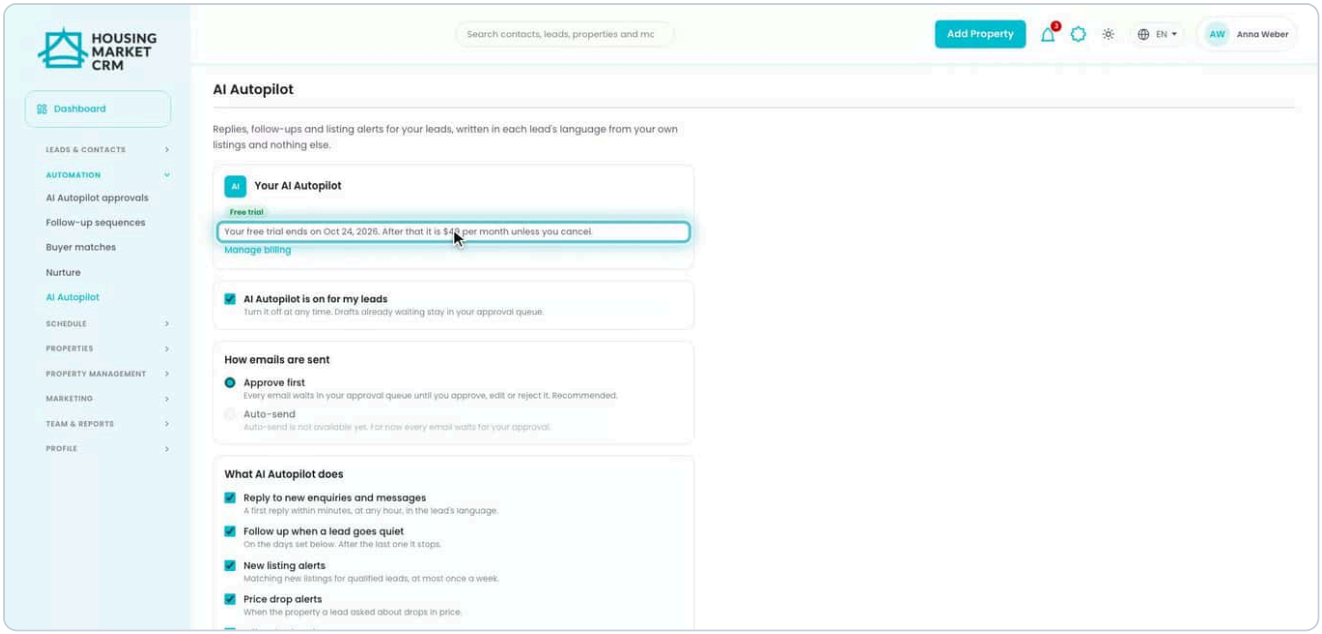


Figure 77.4 · Screen recorded 4 November 2026

5 Switch it on or off **at any time**.

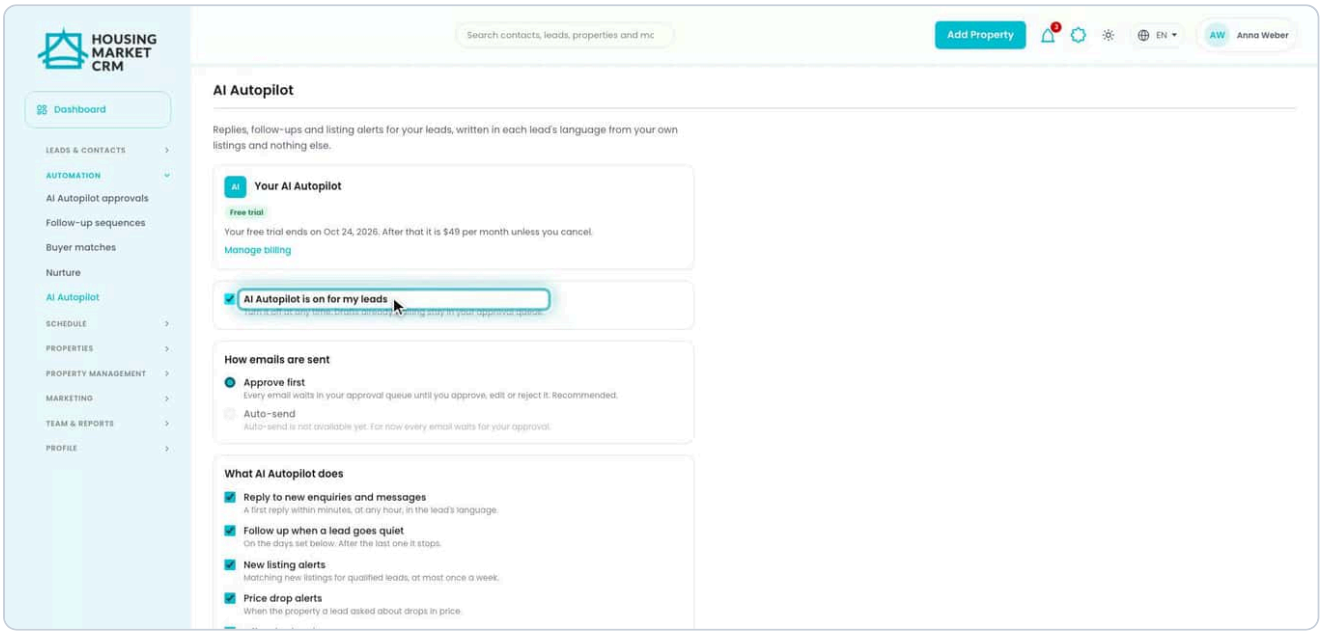


Figure 77.5 · Screen recorded 4 November 2026

6 **Approve first**: every email waits for you.

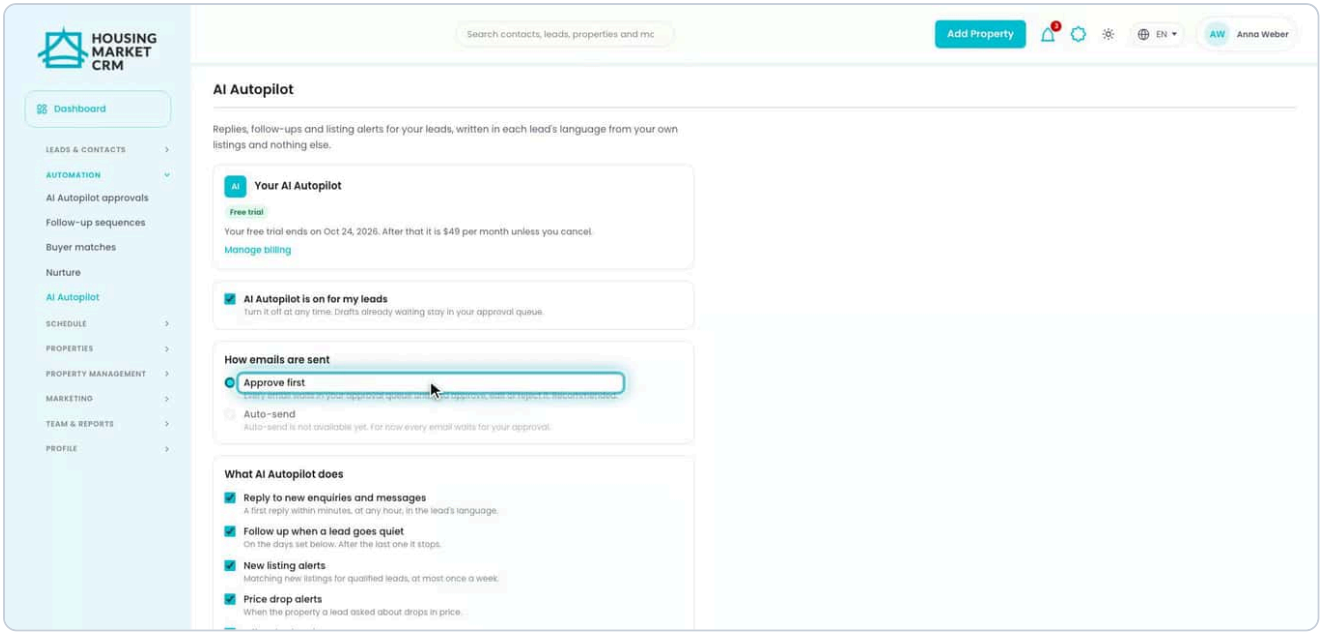


Figure 77.6 · Screen recorded 4 November 2026

7 Choose what it may do: **replies**, **follow-ups**, **listing alerts** and the **guardrails** it must keep to.

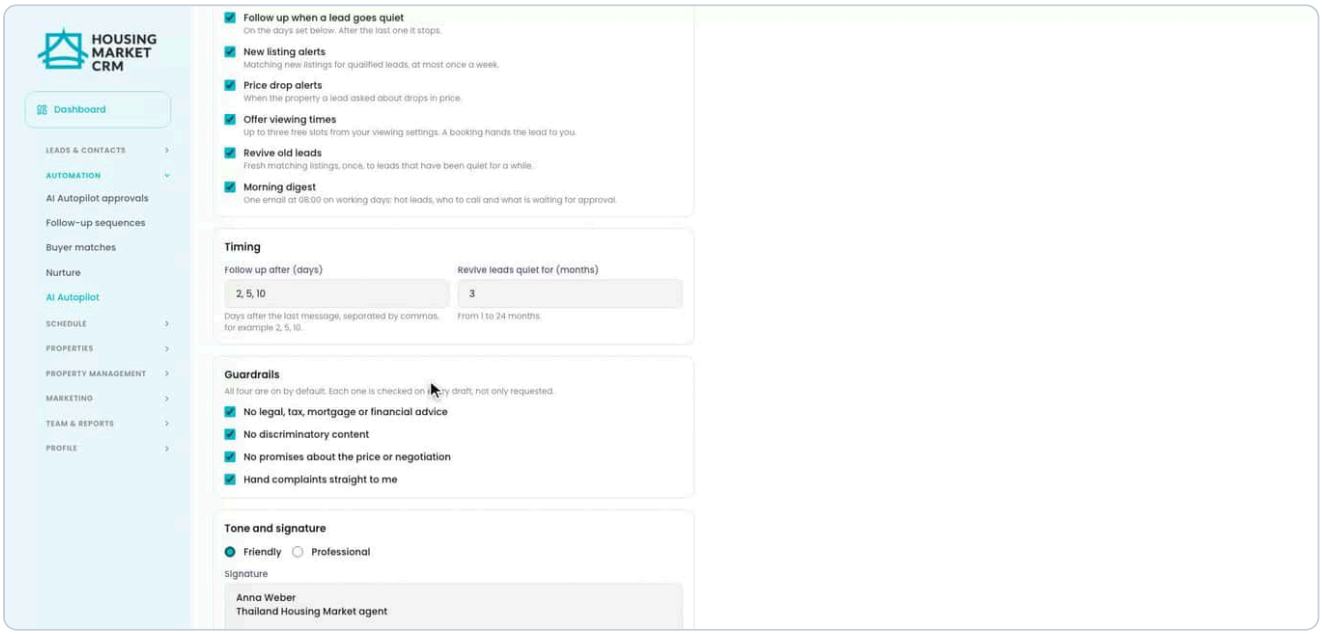


Figure 77.7 · Screen recorded 4 November 2026

8 No advice, no price promises, complaints **straight to you**.

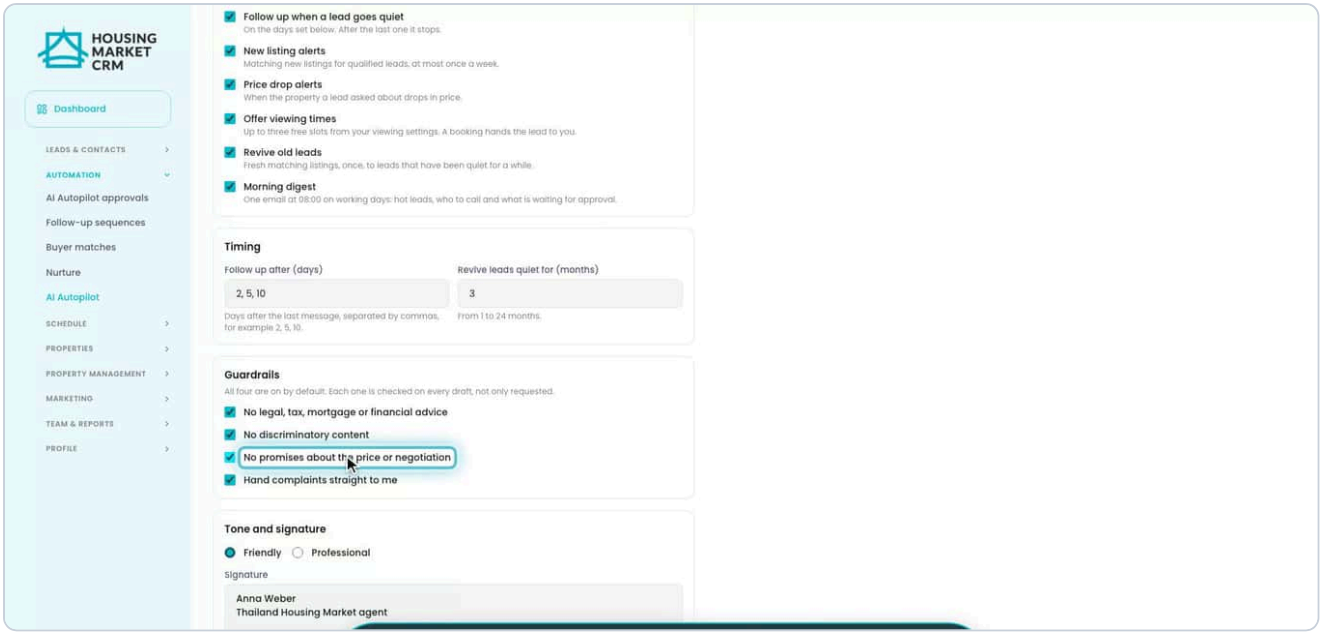


Figure 77.8 · Screen recorded 4 November 2026

9 Click **AI Autopilot approvals**.

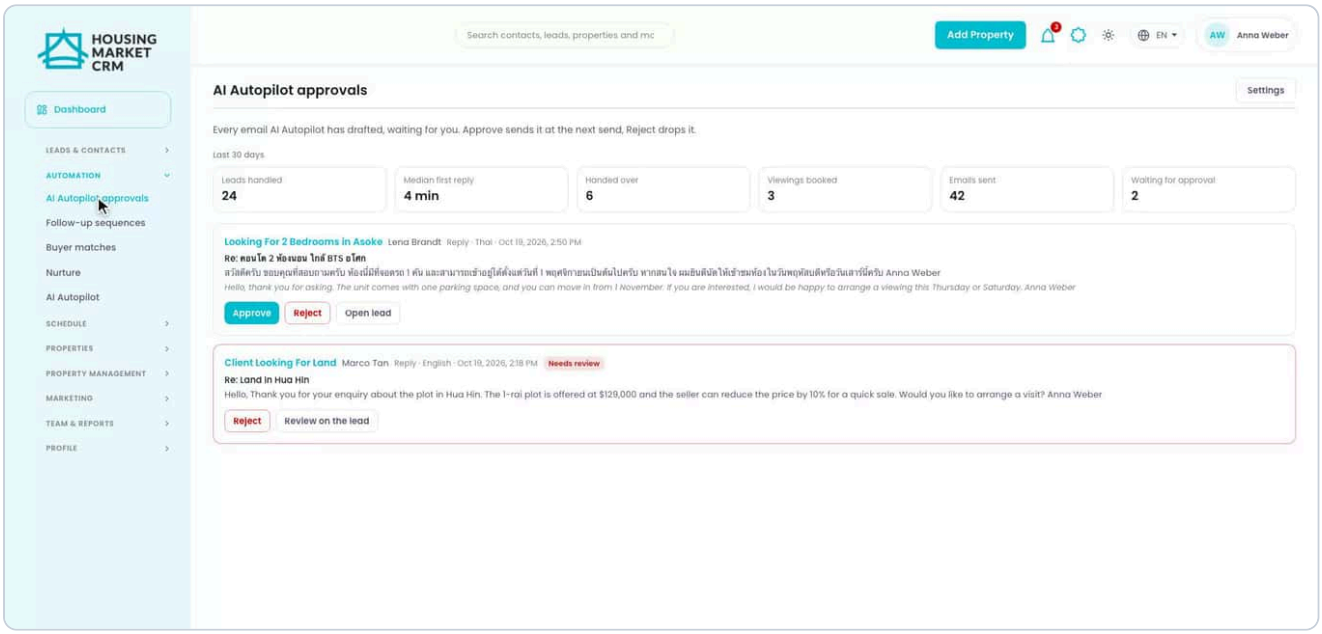


Figure 77.9 · Screen recorded 4 November 2026

10 What it has done in the **last 30 days**.

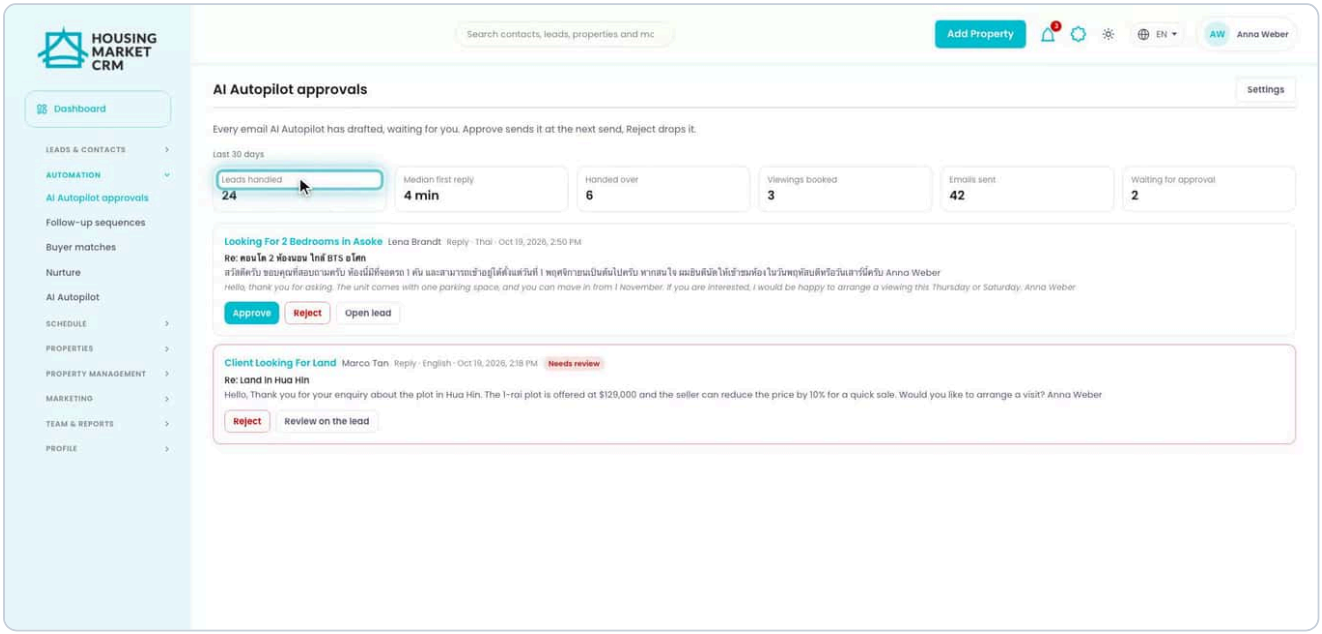


Figure 77.10 · Screen recorded 4 November 2026

11 A reply drafted in the **lead's language**, with an English translation.

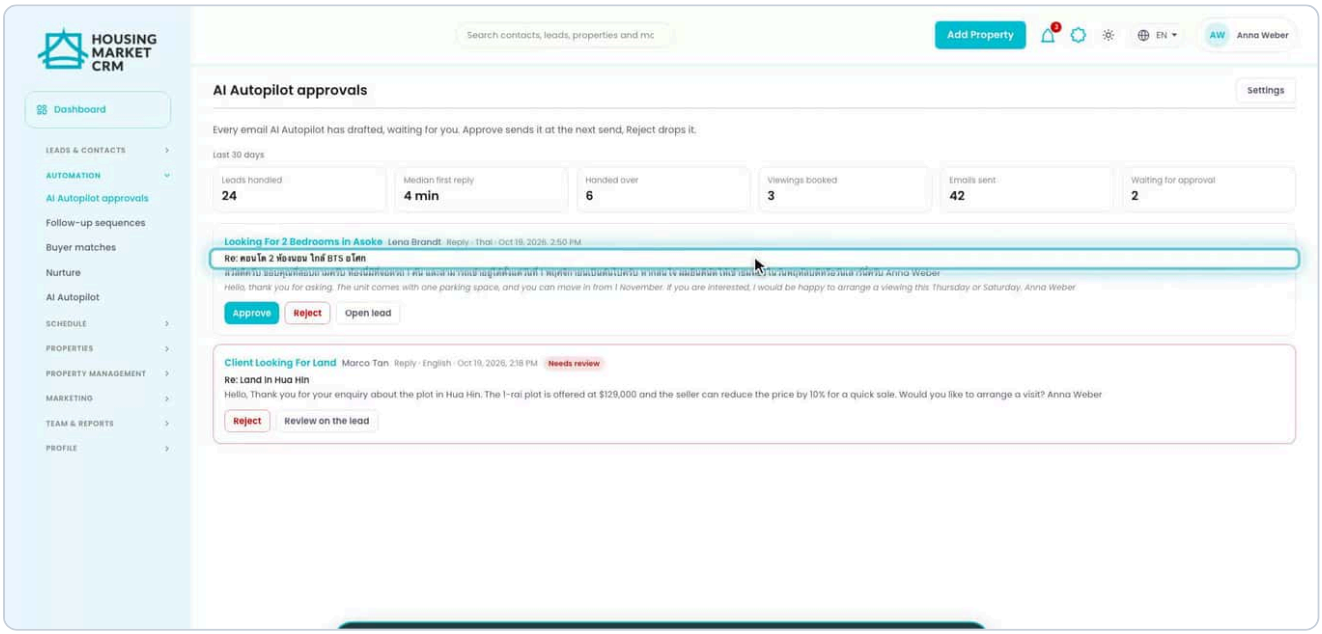


Figure 77.11 · Screen recorded 4 November 2026

12 Read it, then click **Approve**.

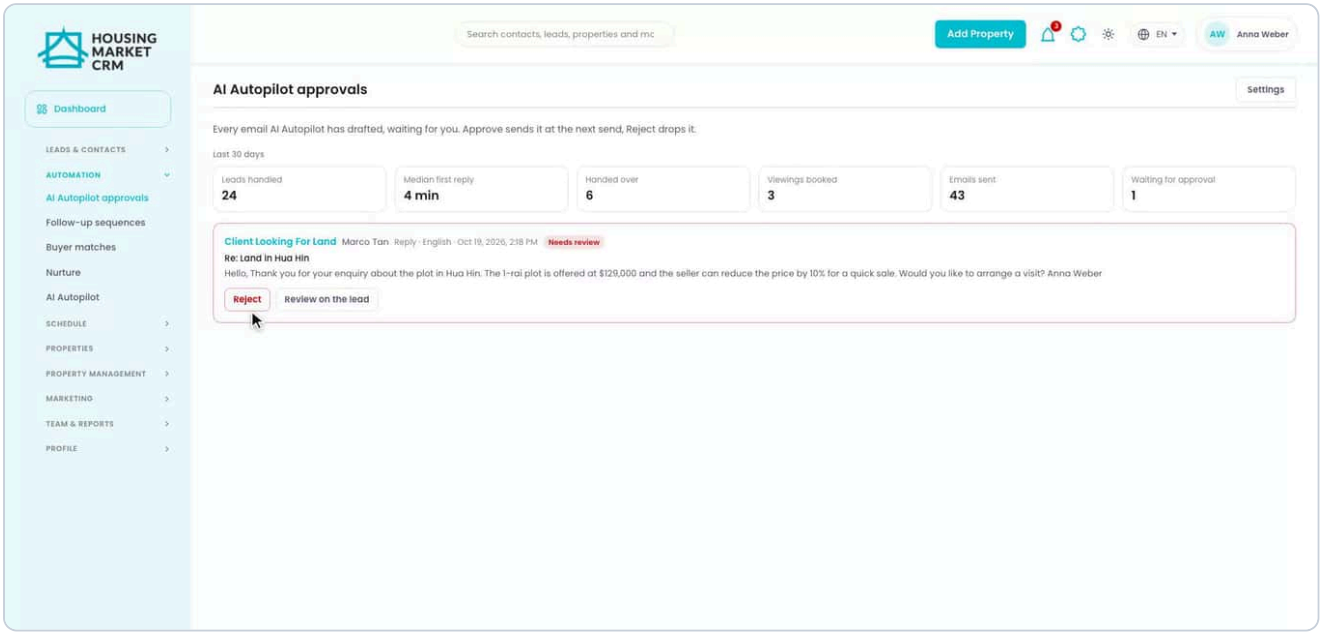


Figure 77.12 · Screen recorded 4 November 2026

13 A draft that broke a guardrail is held for **review**.

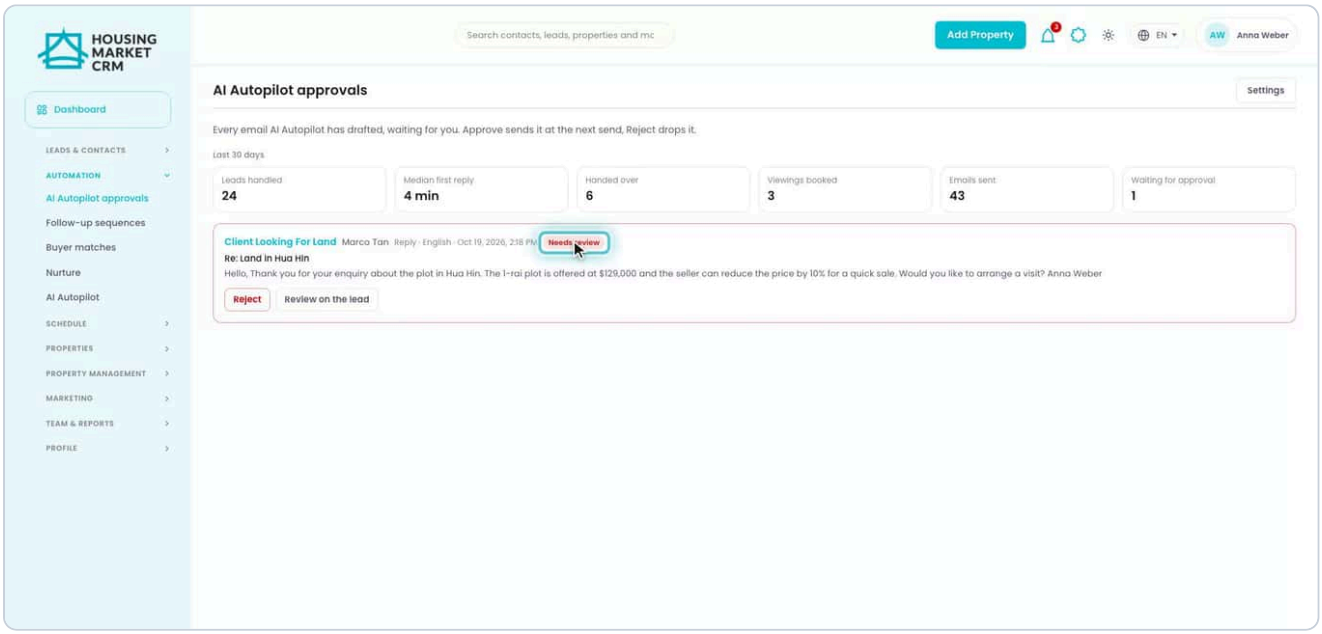


Figure 77.13 · Screen recorded 4 November 2026

14 Check it on the lead, or **Reject** it.

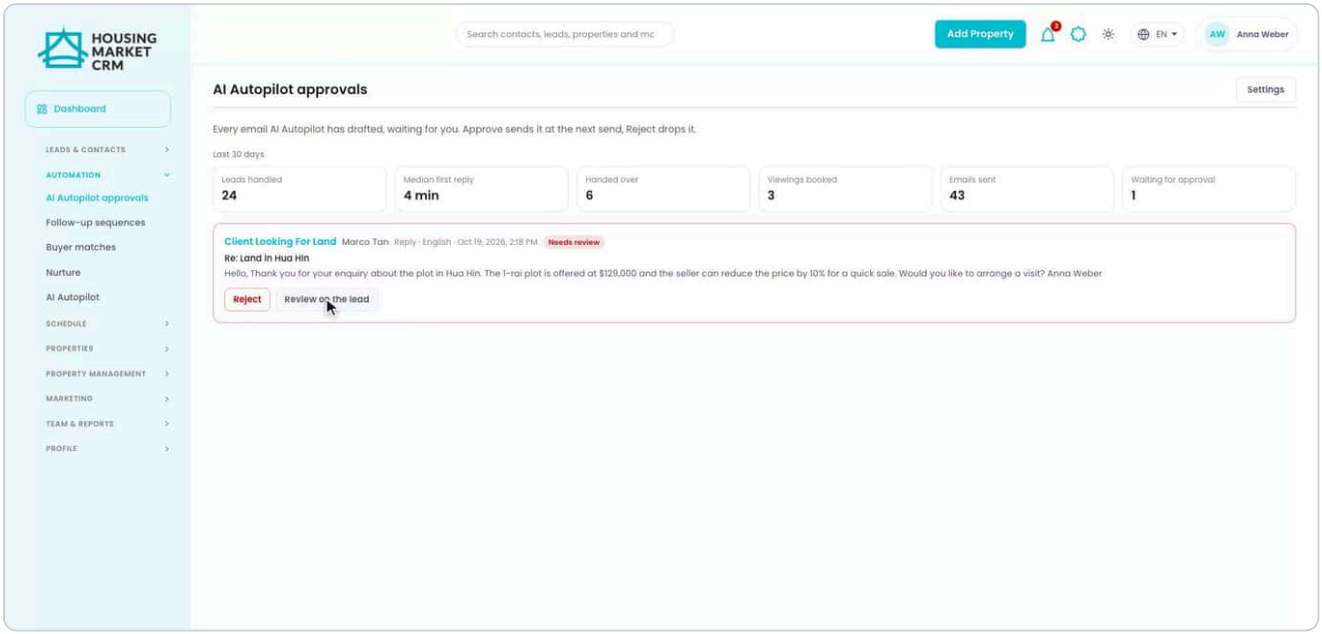


Figure 77.14 · Screen recorded 4 November 2026

RELATED HELP CENTER ARTICLES

Who is Housing Market CRM designed for?	faq.housingmarketgroup.com/faq/who-is-housing-market-crm-designed-for
How much does AI Autopilot cost?	faq.housingmarketgroup.com/faq/how-much-does-ai-autopilot-cost

PART 6

Housing Market Social (add-on)

78 Start the free trial and subscribe

79 Connect LinkedIn

80 Share a listing on social media

81 Write a post with AI captions

82 Manage posts and queues

83 Make evergreen post lists

84 Bulk schedule posts from a CSV

85 Social statistics and tracked links

86 Social settings

87 Post new listings with auto-post rules

88 Track clicks on every link

89 Statistics by property

90 Delete my data

91 Post by hand to Facebook and Instagram

78 CHAPTER 78

Start the free trial and subscribe

Housing Market Social add-on | For agents | Watch the video

OVERVIEW

A social media tool for your listings: 19 USD per month for one person, with or without a CRM plan.

Housing Market Social is a separate product for estate agents. You connect your social media accounts, turn your listings into posts, plan them on a calendar and see the clicks and enquiries each post brings. Enquiries that come from a post reach your CRM as leads, with the network they came from. You can connect LinkedIn now. The other networks are currently updating.

One subscription works in two places: on your portal account, under Social in your dashboard, and inside Housing Market CRM, under Marketing and then Social. Whichever you subscribe in, it works in both, and you are never charged twice.

It is bought by one person, not by an office, so each person who wants it subscribes on their own account. It is not part of the Free, Pro or Business plan of the CRM, and a CRM plan does not change what it costs.

From the Help Center: **What is Housing Market Social?**

Write posts once, plan them on a calendar, repeat your best ones and let a rule post for you when a listing changes.

Housing Market Social is where you plan and publish the social media posts for your listings. It has these parts, under Social in your portal dashboard or under Marketing and then Social in Housing Market CRM:

- New post: write a post once, change the text for any one account and see how each network will show it. You can start from one of your live listings, which fills in the text, the photos, the price and the link.
- Calendar: see what is scheduled and what went out by month, week or day, and drag a scheduled post to another day.
- Posts and queues: every post with its state, and queues of regular days and times for an account.
- Evergreen: lists of posts about you, tips or testimonials that repeat on a schedule.
- Bulk upload: schedule many posts at once from a spreadsheet saved as CSV. Every row is checked first, and nothing is made until you say so.
- Auto-post: choose what posts itself when one of your listings goes live, drops in price, is sold or is rented.
- Accounts and Settings: connect your networks, and choose your time zone, the first day of the week and the starting tone for listing posts.

Scheduling and publishing need a subscription. Without one you can still save drafts. Which networks you can connect, and what each one allows, is in "Which social networks can I connect to Housing Market Social?".

From the Help Center: **What can I do with Housing Market Social?**

Subscribe from Social in your portal dashboard or from Marketing and then Social in the CRM. Cancel or change your card from Manage billing on the same page.

Open Social in your portal dashboard, or Marketing and then Social in Housing Market CRM, and choose Subscribe. You pay on a secure payment page, and when you return the page shows Housing Market Social as active. It is the same subscription in both places.

Manage billing opens a secure billing page, where you can see your invoices, change your card and cancel. After you cancel you keep using Social until the end of the period you have paid for.

If a payment does not go through, the page tells you and shows how to update your card. Scheduled posts keep going out for a short grace period; after that publishing pauses, and your drafts and statistics stay available until the payment is fixed.

Housing Market Social is for agent accounts. Home owner and buyer accounts cannot subscribe to it.

From the Help Center: **How do I subscribe to Housing Market Social, and how do I cancel?**

STEP BY STEP

1. Open your **Housing Market CRM** account.

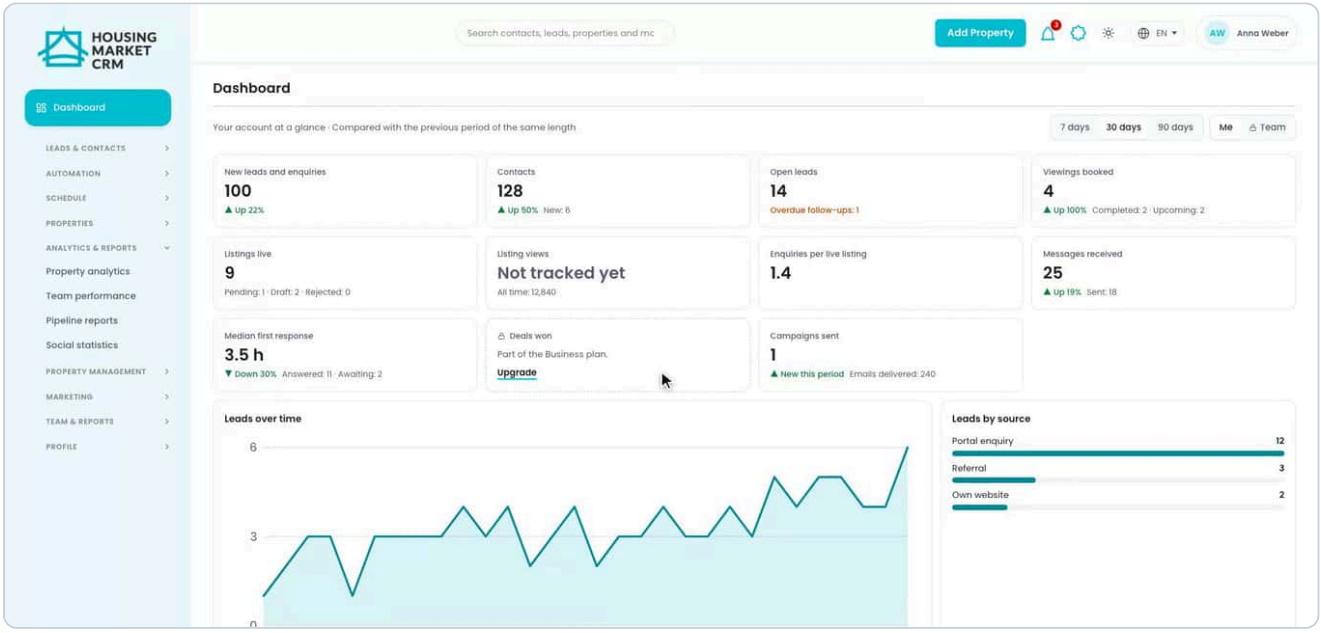


Figure 78.1 · Screen recorded 28 October 2026

2 Open **Marketing** in the left menu.

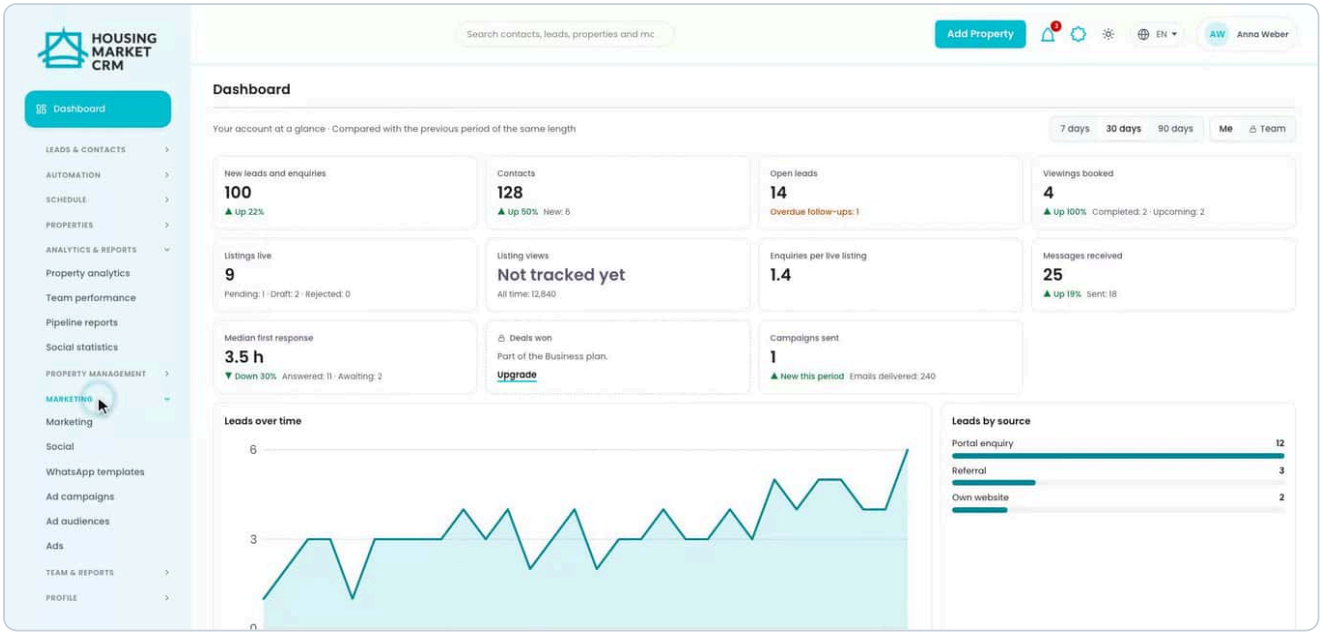


Figure 78.2 · Screen recorded 28 October 2026

3 Click **Social**.

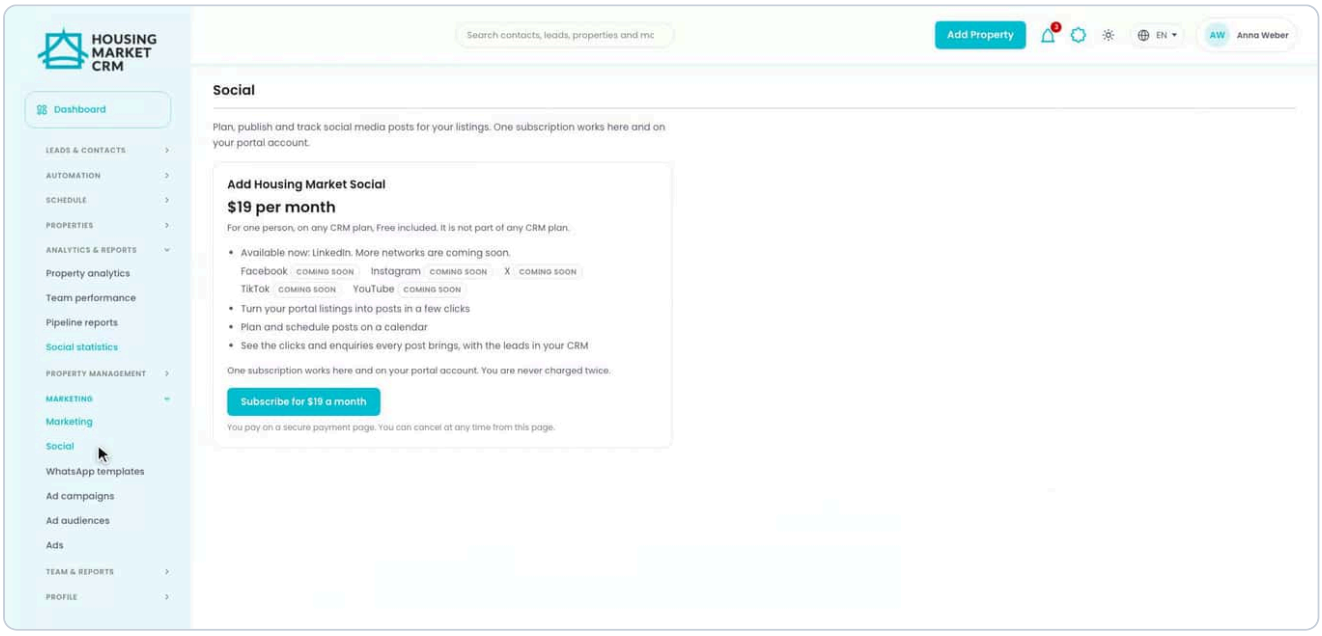


Figure 78.3 · Screen recorded 28 October 2026

4 **Housing Market Social** costs **19 USD a month** for one person, on **any CRM plan**, Free included.

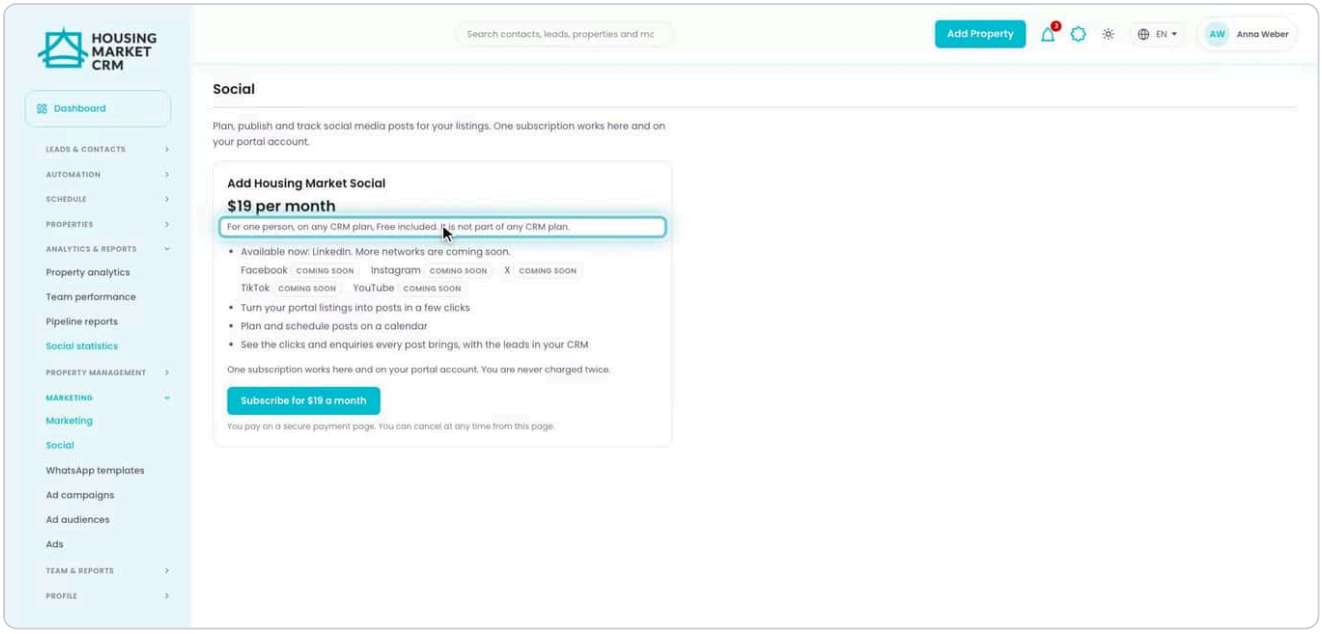


Figure 78.4 · Screen recorded 28 October 2026

5 **LinkedIn** works today. The other networks are **coming soon**.

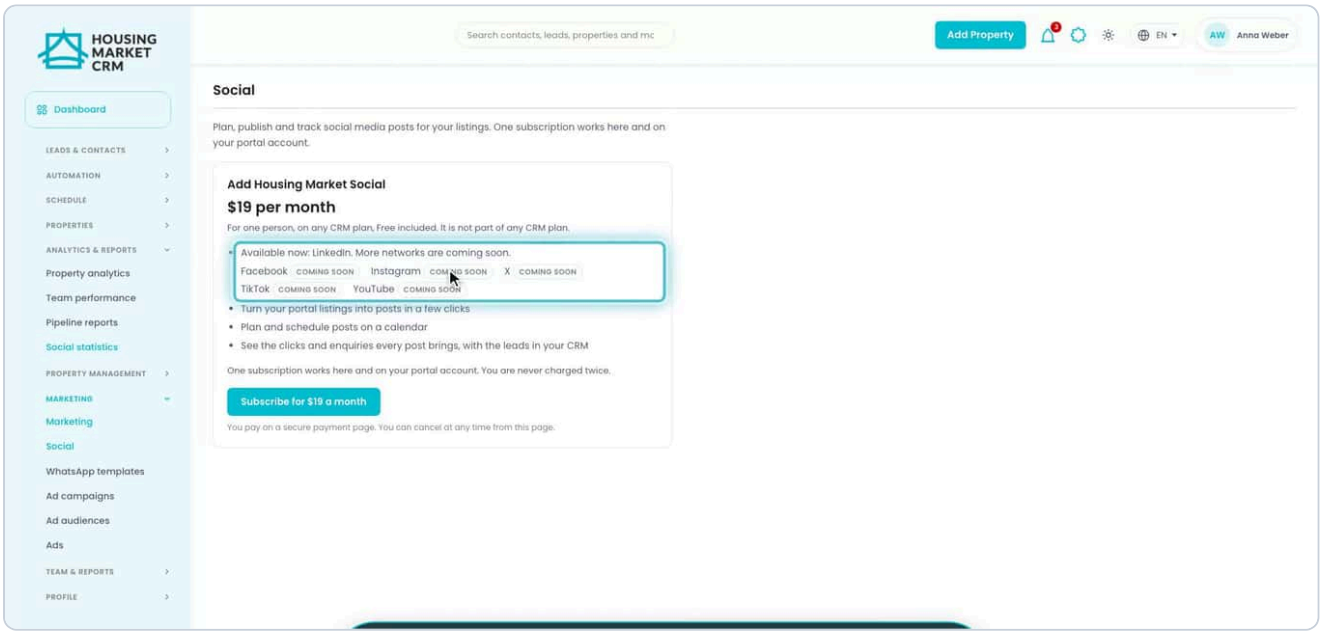


Figure 78.5 · Screen recorded 28 October 2026

6 You also see the **clicks and enquiries** each post brings.

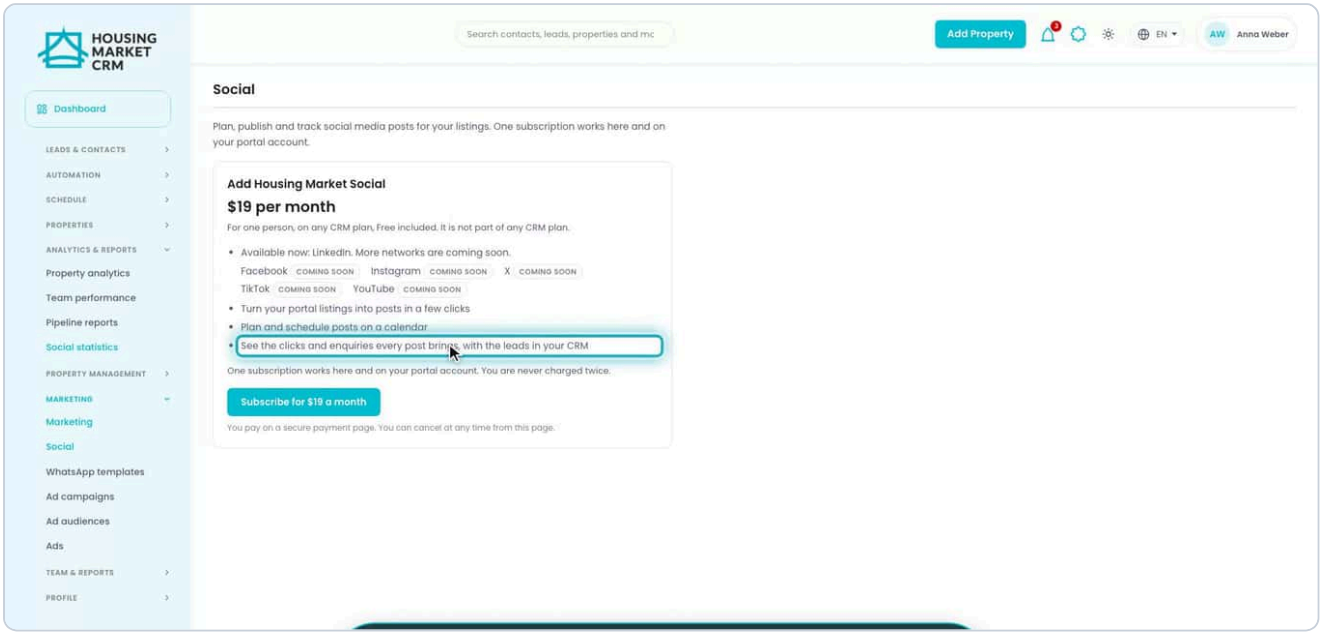


Figure 78.6 · Screen recorded 28 October 2026

7 One subscription works in the CRM **and on your portal**. Never charged twice.

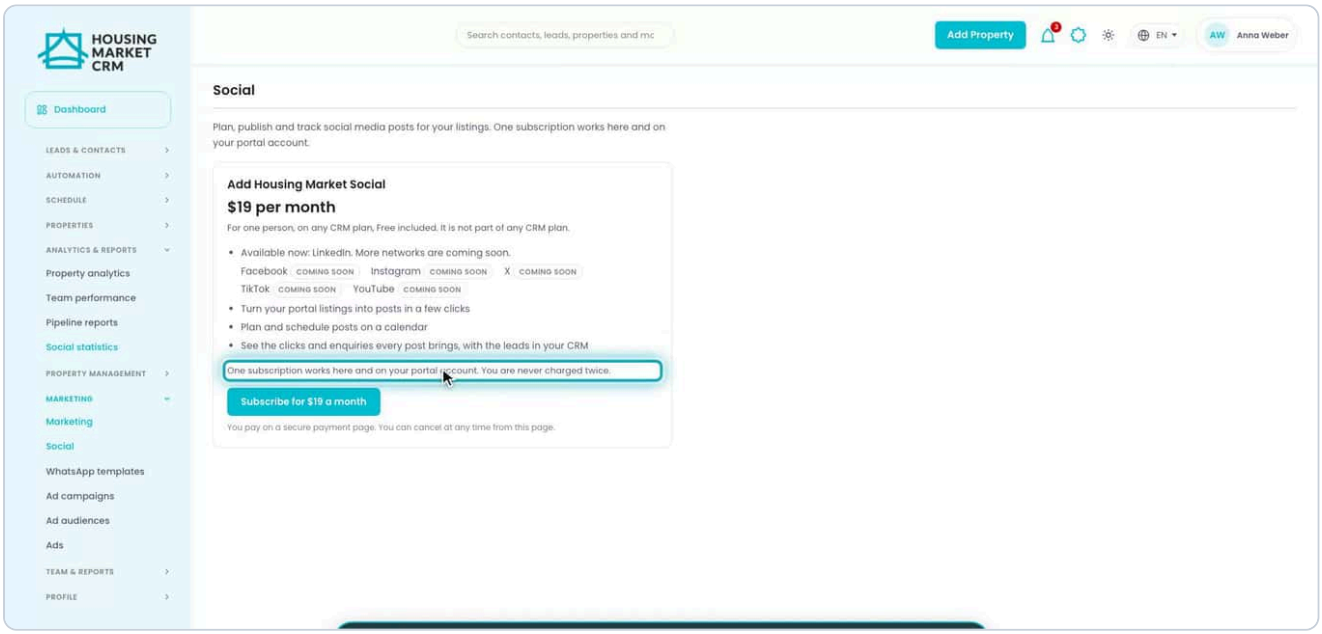


Figure 78.7 · Screen recorded 28 October 2026

8 Click **Subscribe**. You pay on a **secure payment page**.

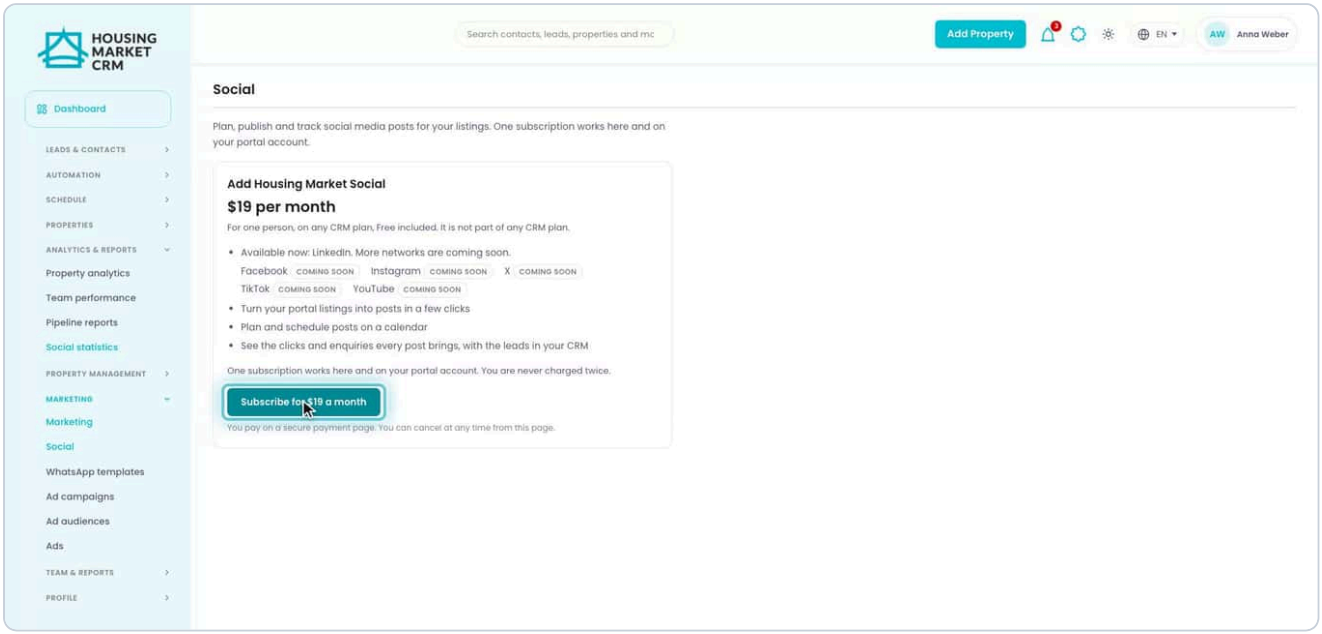


Figure 78.8 · Screen recorded 28 October 2026

9 Your **first 7 days are free**. After that it is 19 USD a month.

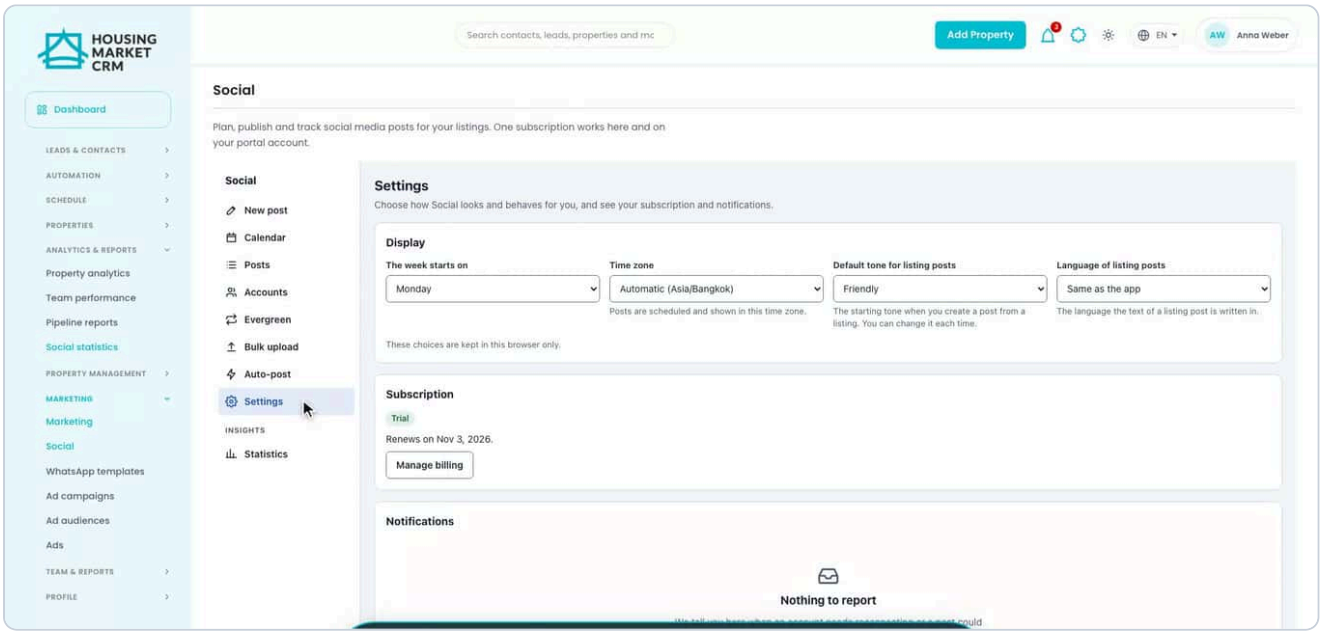


Figure 78.9 · Screen recorded 28 October 2026

10 Once you subscribe, **Social** opens on the same page.

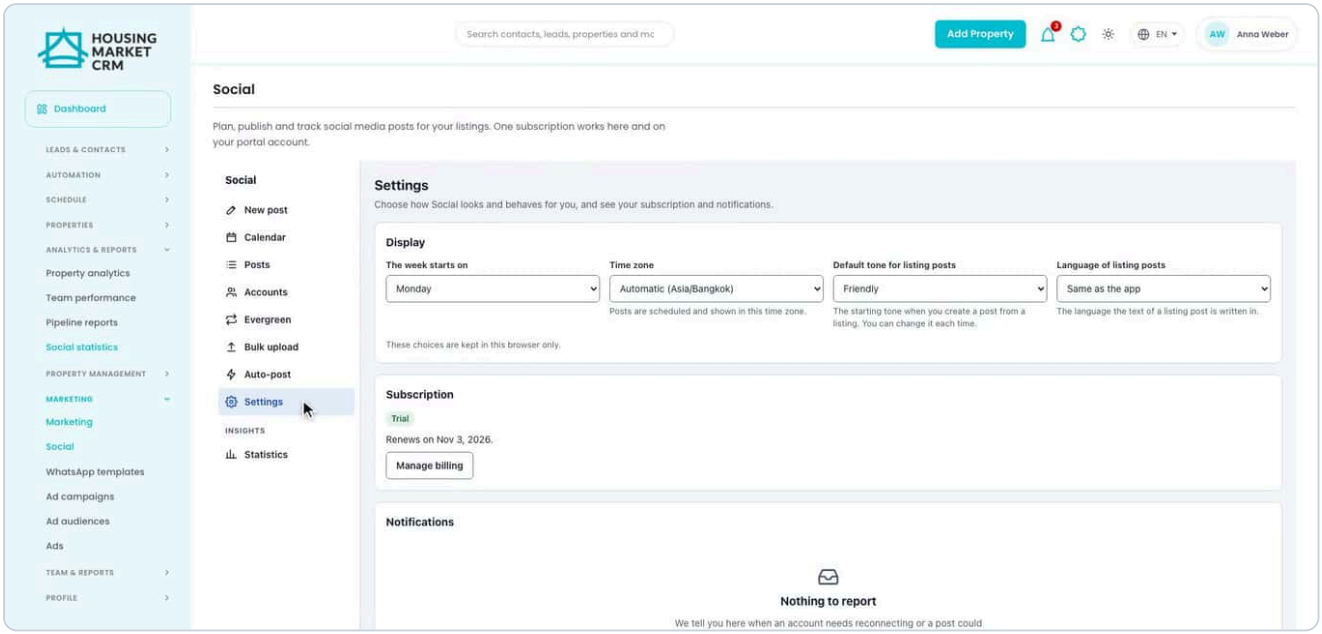


Figure 78.10 · Screen recorded 28 October 2026

11 Under **Settings**, **Subscription** shows your **trial** and when it renews.

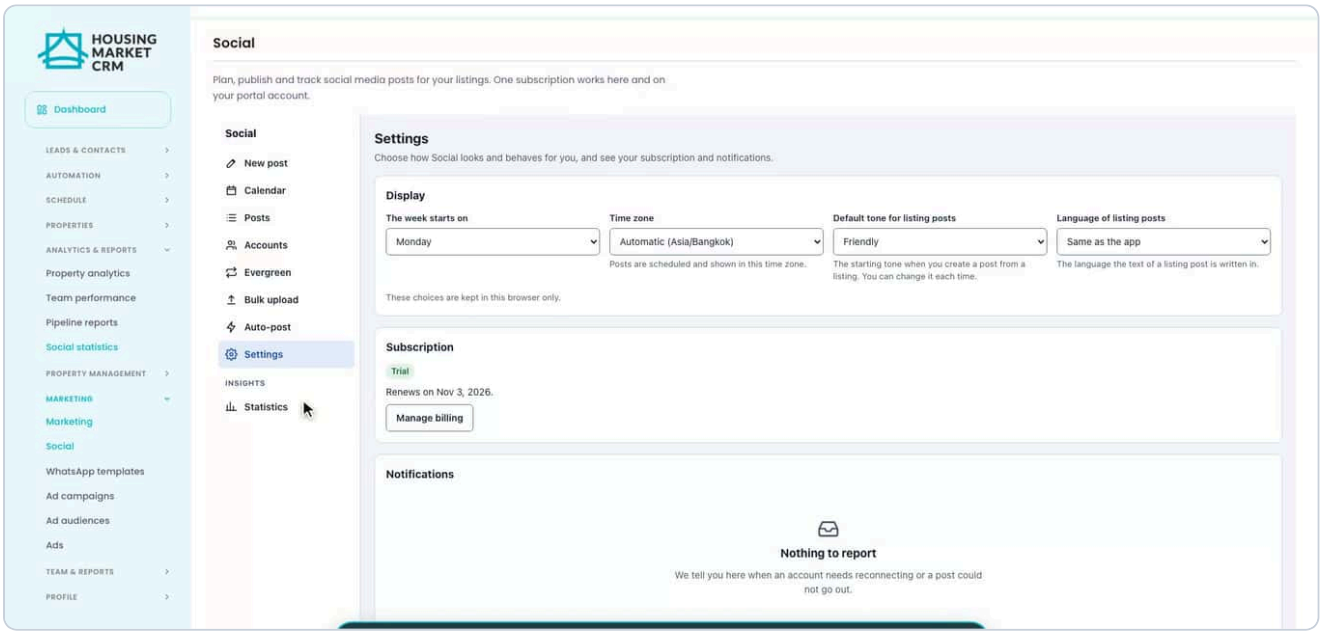


Figure 78.11 · Screen recorded 28 October 2026

12 Use **Manage billing** to change your card or **cancel** at any time.

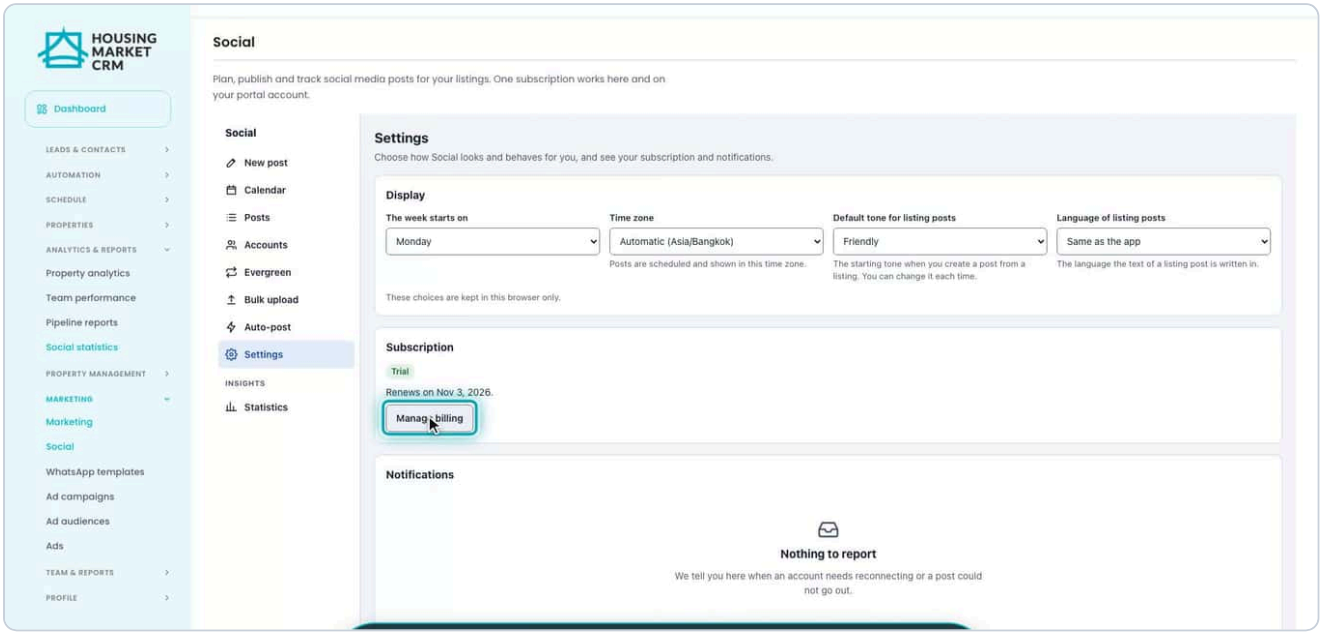


Figure 78.12 · Screen recorded 28 October 2026

13 If you cancel, you keep Social until the end of the period you paid for.

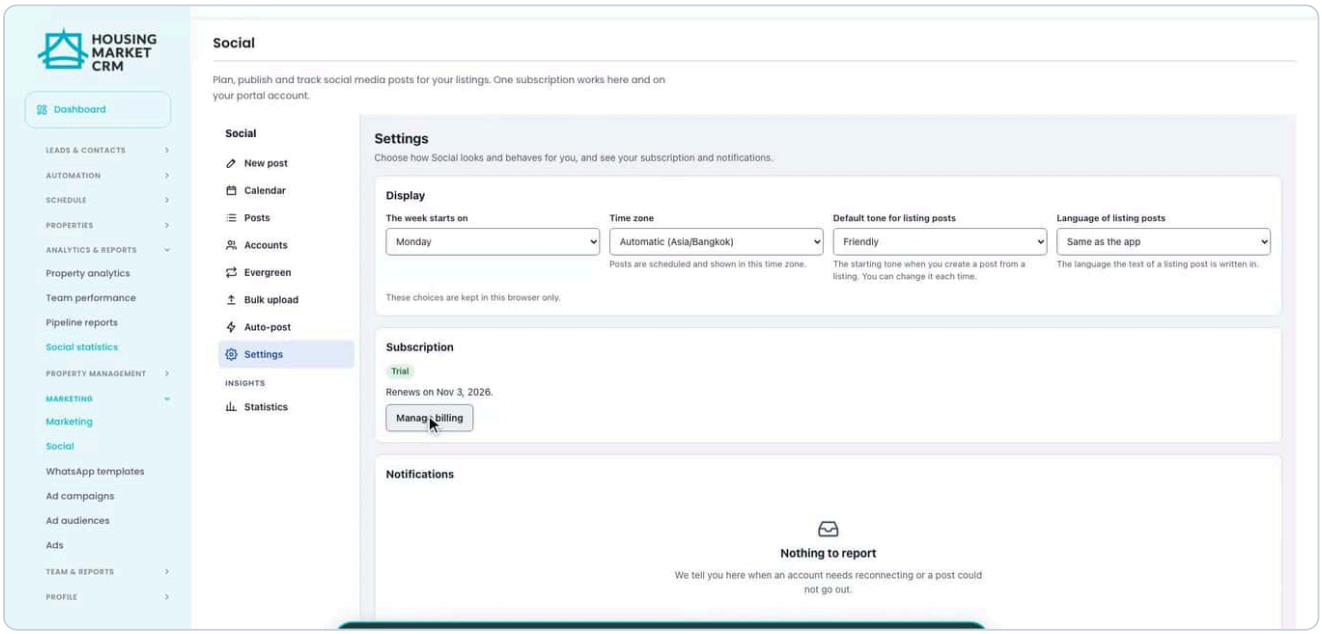


Figure 78.13 · Screen recorded 28 October 2026

GOOD TO KNOW

NOTE

No. It is 19 USD per month on every plan, Free, Pro and Business alike.

Help Center: Is Housing Market Social included in my CRM plan?

TIP

No. Housing Market Social opens inside your CRM or your portal account, and it uses the sign-in you already have.

Help Center: Do I need a separate login for Housing Market Social?

79 CHAPTER 79

Connect LinkedIn

Housing Market Social add-on | For agents | Watch the video

OVERVIEW

You can connect LinkedIn now. Facebook Pages, Instagram professional accounts, X and YouTube are currently updating, and so is sending TikTok videos to your drafts. Personal Facebook and Instagram profiles get a reminder instead.

You connect each network once, under Accounts. You go to the network's own page to give permission and then come back, and Housing Market Social never sees your password. You can disconnect an account at any time.

LinkedIn is the only network you can connect today. The others below are currently updating, and Accounts shows them without a Connect button until they open.

- LinkedIn: your personal profile. You can connect it now.
- Facebook: the Pages you manage. Currently updating.
- Instagram: business and creator accounts. Currently updating.
- X: your X account. Currently updating.
- YouTube: your channel. Currently updating.
- TikTok: currently updating. Videos will arrive as drafts in your TikTok inbox, and you will publish them from TikTok. Direct posting to TikTok is not available yet.

Personal Facebook and Instagram profiles and Facebook groups are different: the networks do not let any tool post to them. See "Can I post to my personal Facebook or Instagram profile?".

What the networks decide

Each network sets its own rules and Social follows them. The preview shows the length of your text against the network's limit and anything the network would refuse. X limits posts that contain a link, so an account can reach a monthly limit for them; the post then stops and Social tells you, and posts without a link are not affected.

A connection can also end, for example when a network withdraws permission or a login expires. Where the network gives notice, Social warns you before it ends, and in every case it asks you to reconnect so that scheduled posts keep going out.

From the Help Center: **Which social networks can I connect to Housing Market Social?**

STEP BY STEP

1 In **Marketing > Social**, open **Accounts**.

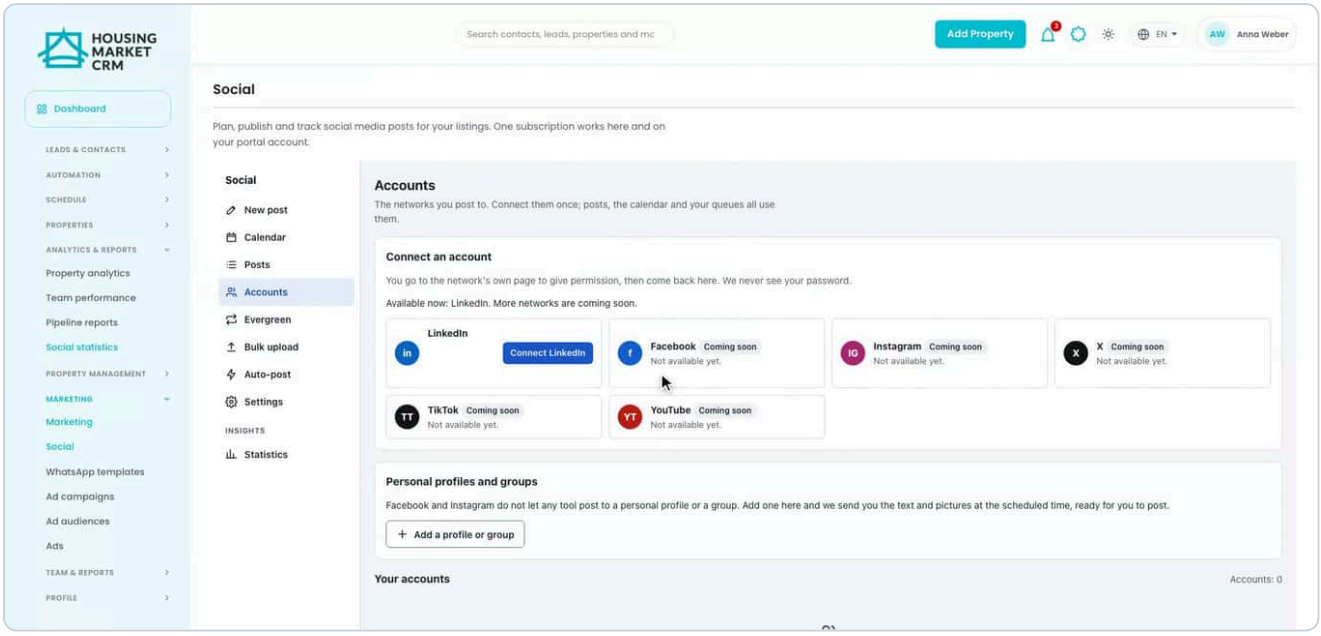


Figure 79.1 · Screen recorded 28 October 2026

2 **LinkedIn** works today, for your **personal profile**.

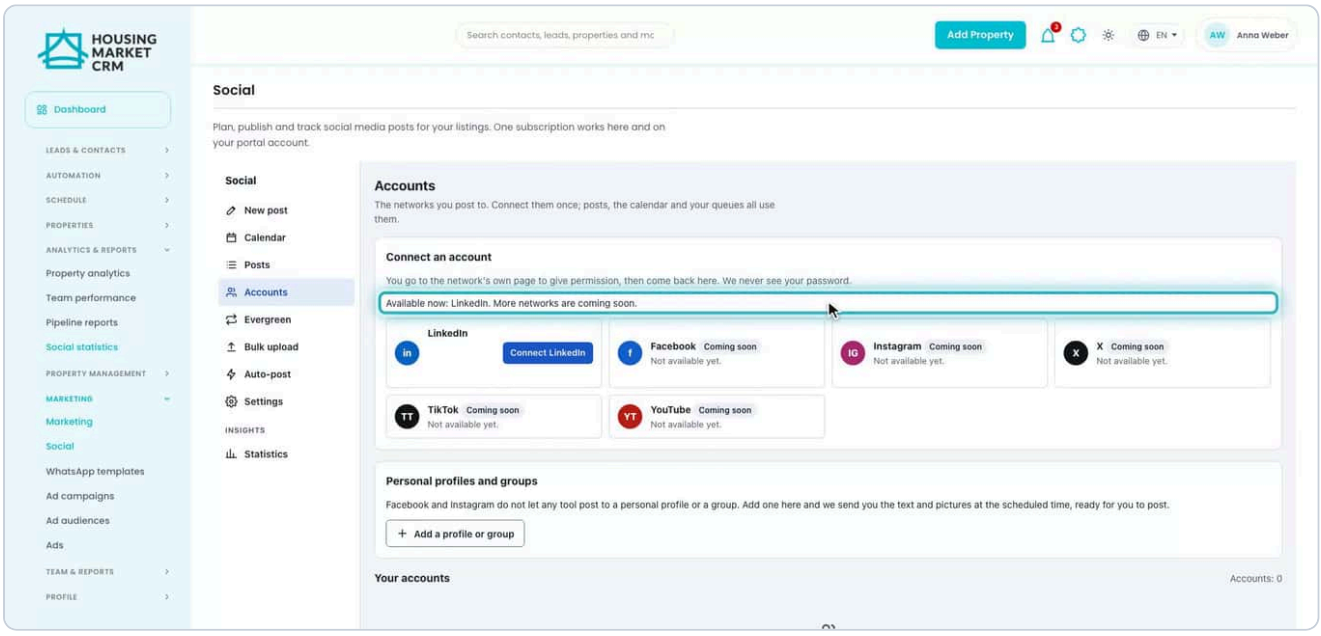


Figure 79.2 · Screen recorded 28 October 2026

3 Facebook, Instagram, X, TikTok and YouTube are **coming soon**.

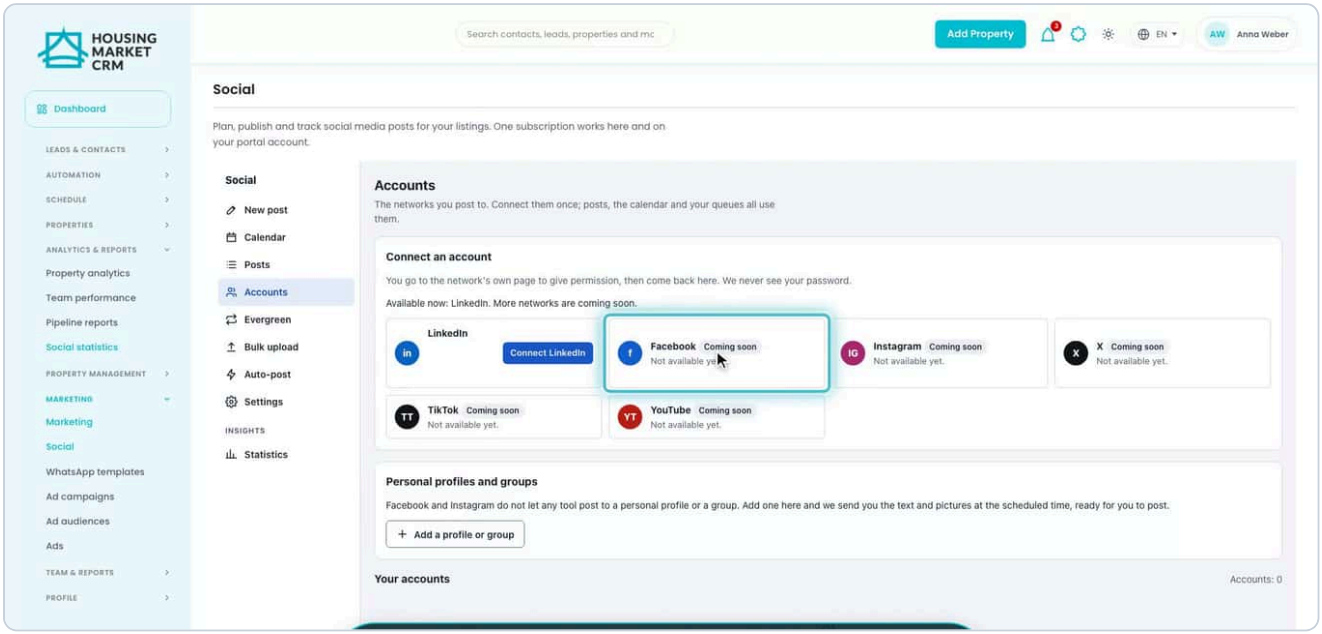


Figure 79.3 · Screen recorded 28 October 2026

4 Click **Connect LinkedIn**.

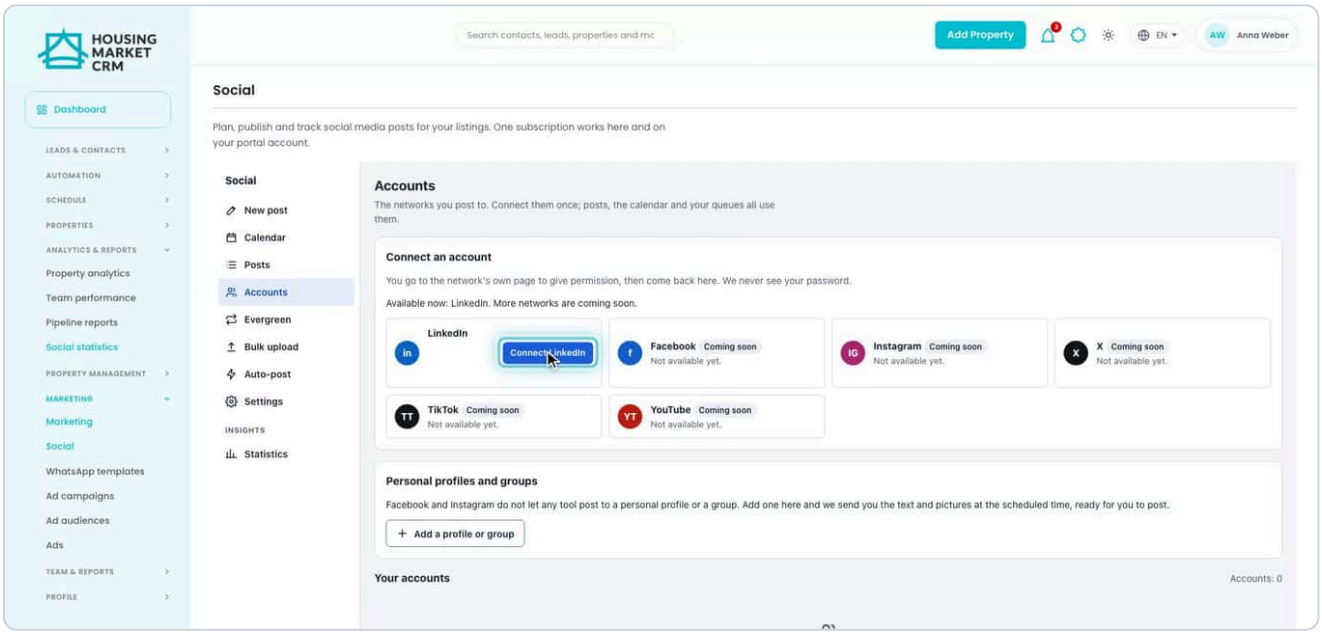


Figure 79.4 · Screen recorded 28 October 2026

5 LinkedIn's own page opens. Sign in there and allow access.

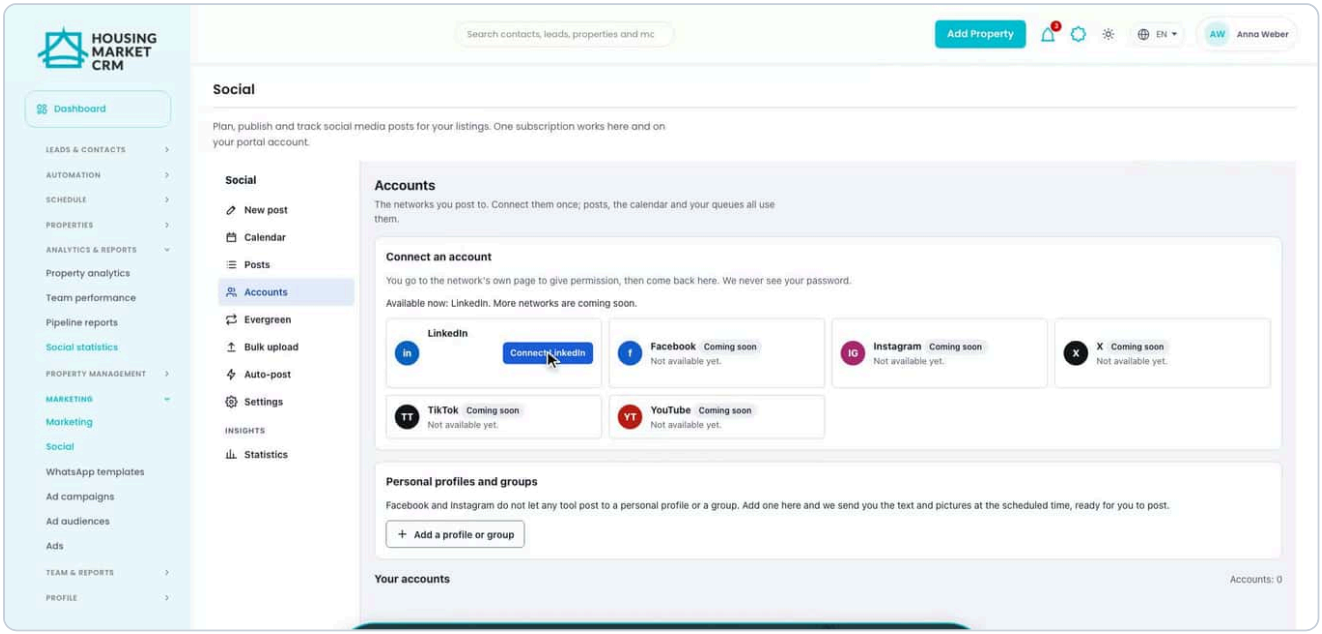


Figure 79.5 · Screen recorded 28 October 2026

6 Housing Market never sees your LinkedIn password.

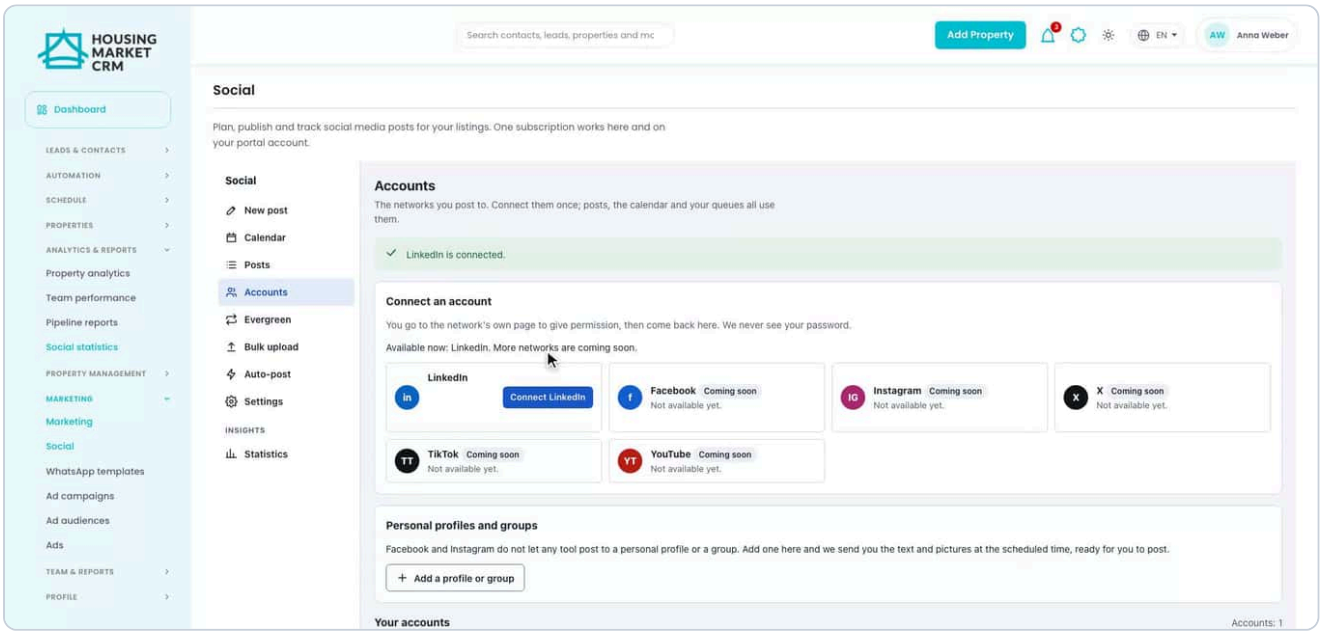


Figure 79.6 · Screen recorded 28 October 2026

7 Back in the CRM, you see **LinkedIn is connected**.

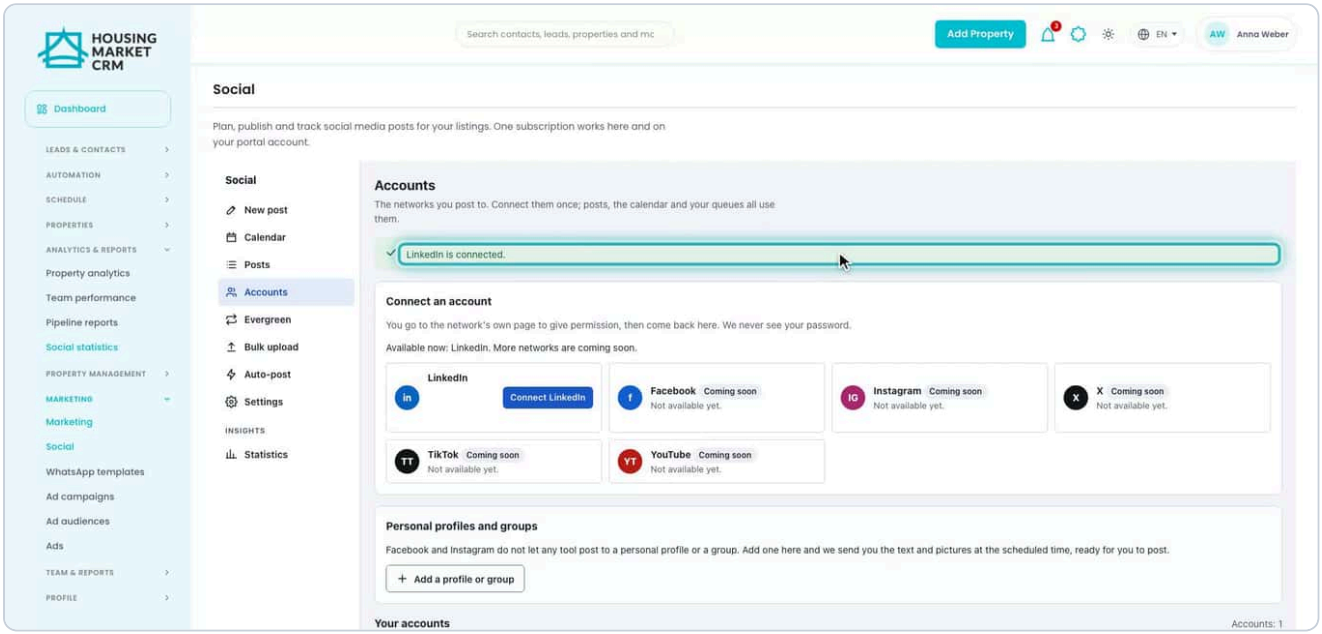


Figure 79.7 · Screen recorded 28 October 2026

8 Your profile appears under **Your accounts**. It **publishes automatically**.

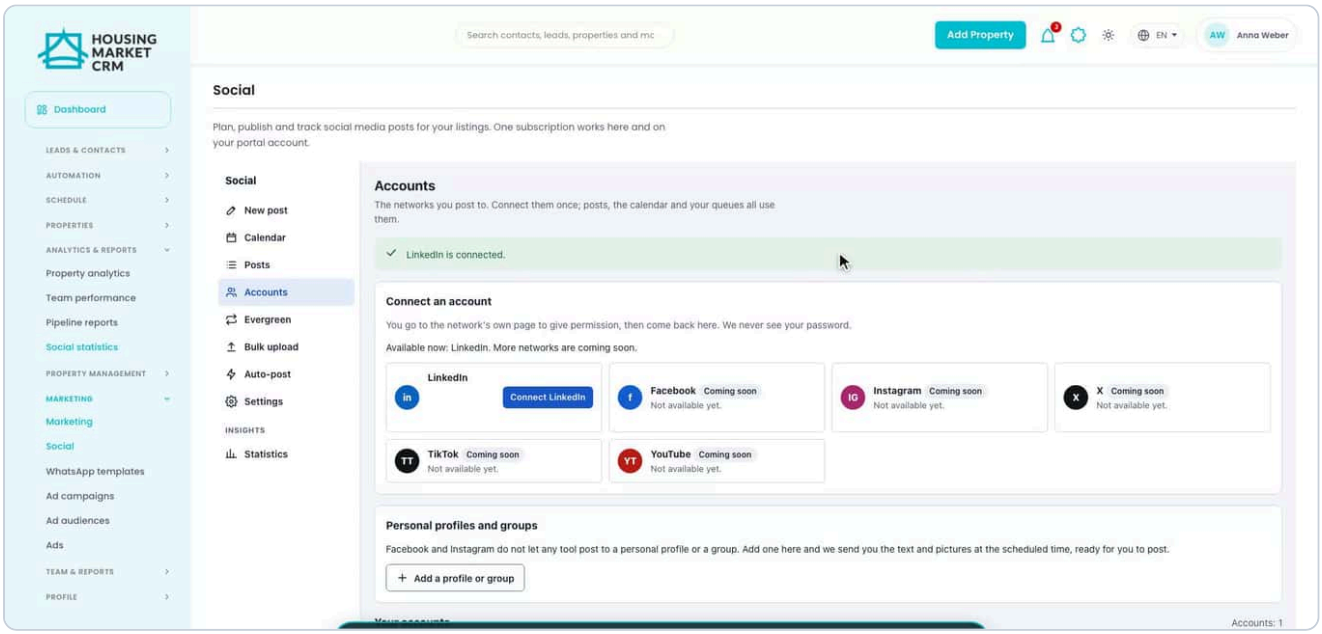


Figure 79.8 · Screen recorded 28 October 2026

9 This date is when the connection ends. **Reconnect** before then.

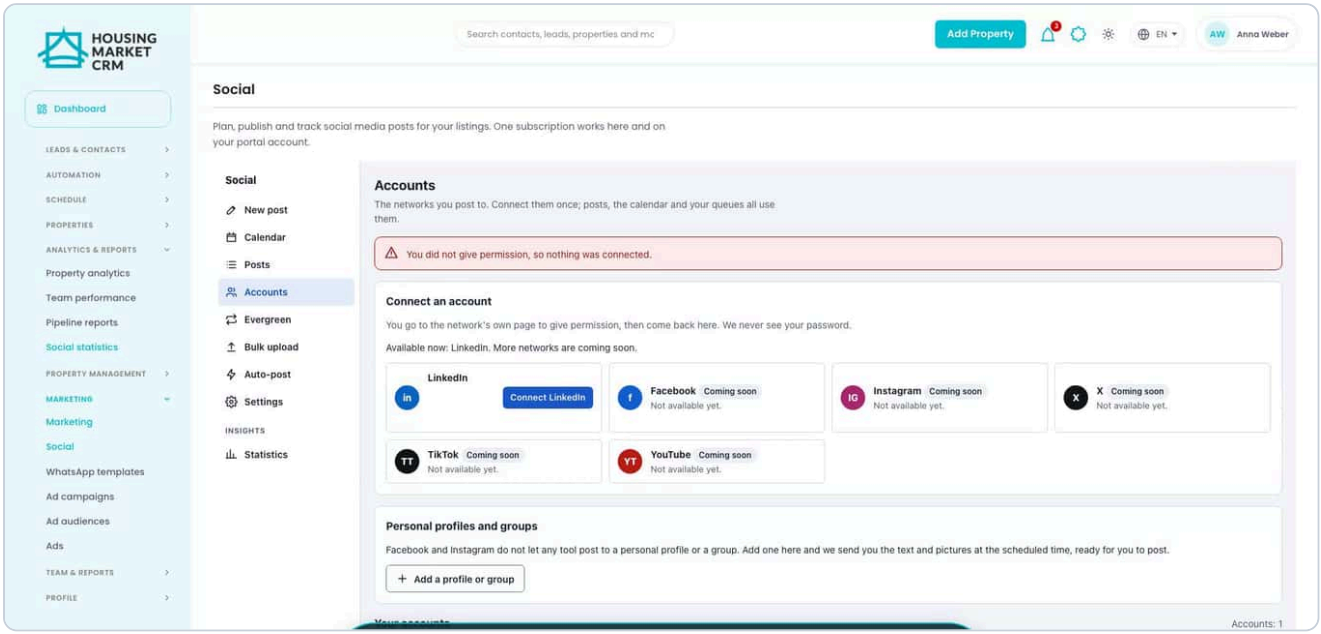


Figure 79.9 · Screen recorded 28 October 2026

10 If you **cancel** on LinkedIn, nothing is connected. Just try again.

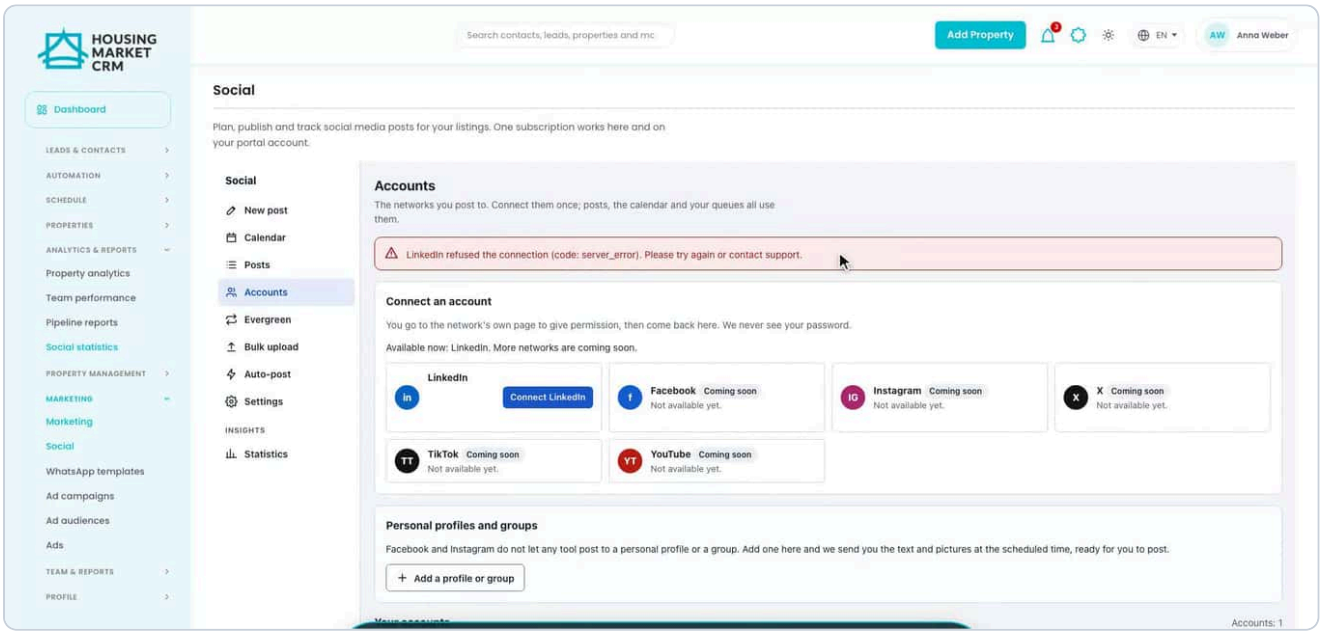


Figure 79.10 · Screen recorded 28 October 2026

11 If **LinkedIn refuses**, you see its code. Try again, or contact support.

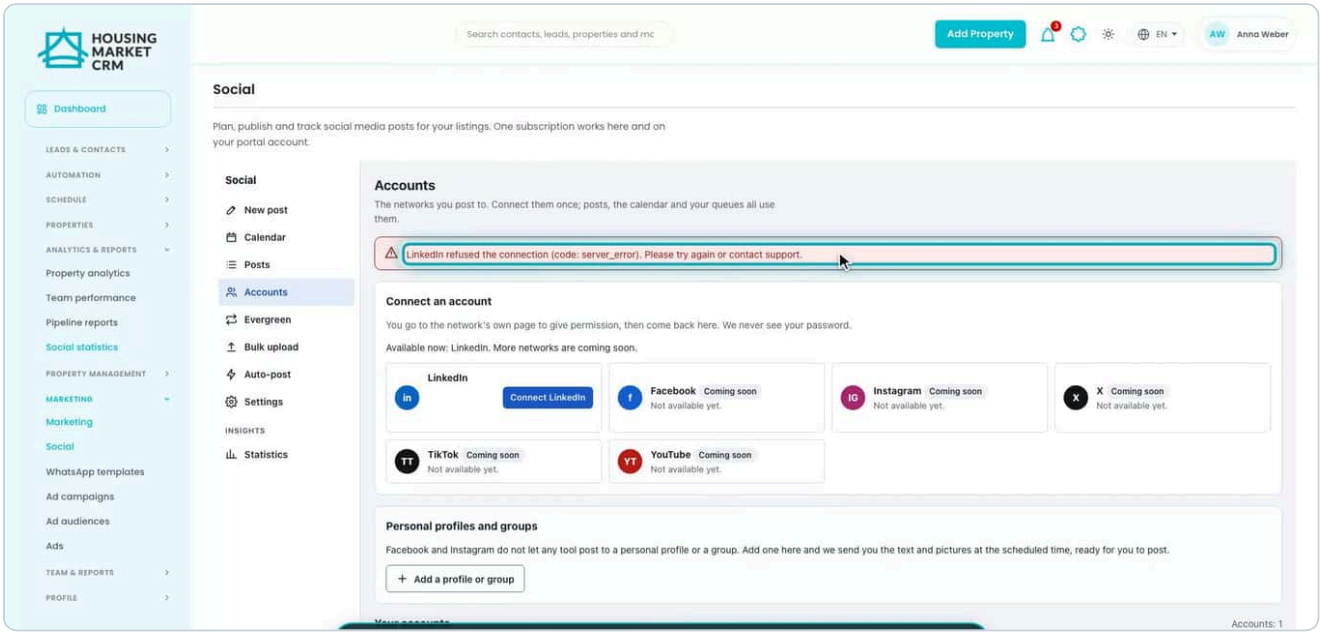


Figure 79.11 · Screen recorded 28 October 2026

12 To stop, click **Disconnect** on the account.

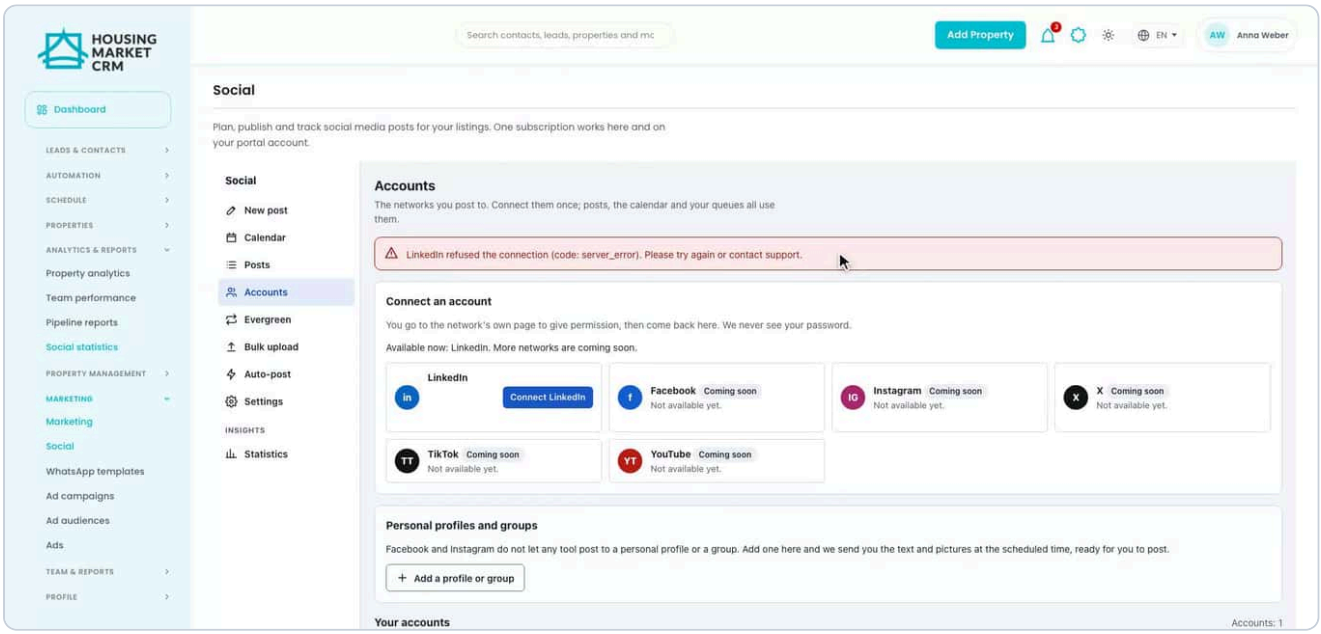


Figure 79.12 · Screen recorded 28 October 2026

13 Posts still waiting for it will not go out. Your history stays.

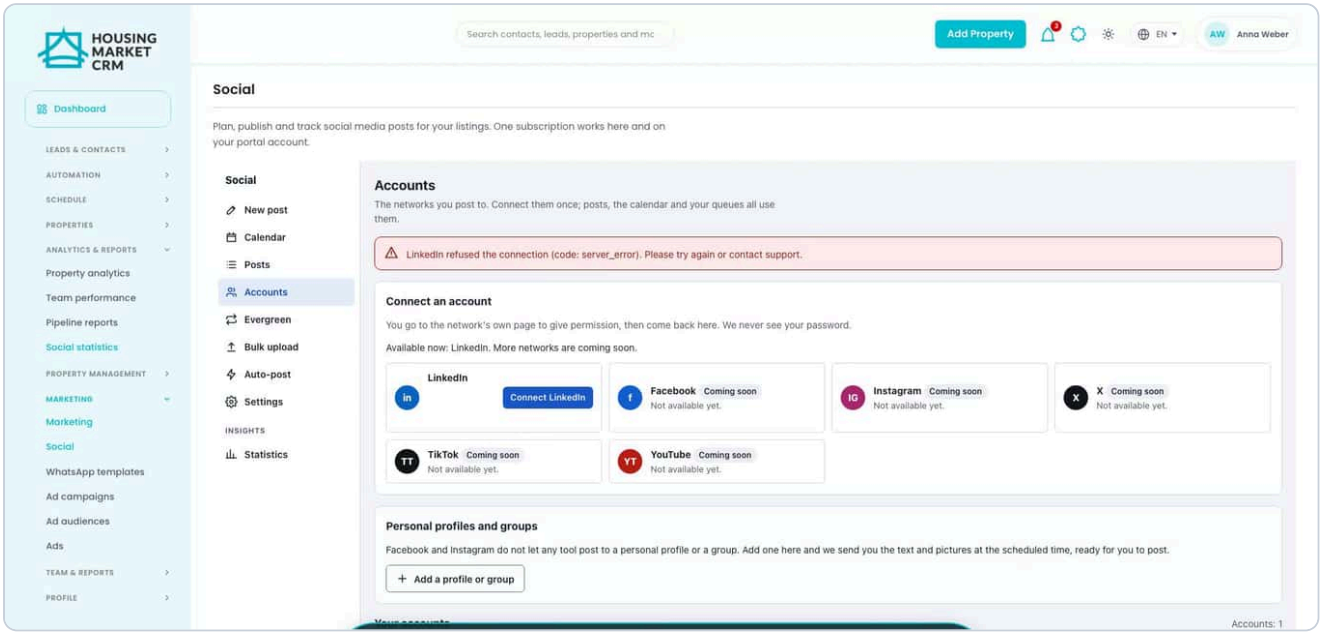


Figure 79.13 · Screen recorded 28 October 2026

GOOD TO KNOW

UPDATING Only LinkedIn connects today. Facebook, Instagram, X, YouTube and TikTok show as coming soon on the Accounts screen and have no Connect button.

UPDATING LinkedIn company pages cannot be connected yet. Only your personal LinkedIn profile connects.

NOTE Not directly. Facebook and Instagram do not let any tool post to a personal profile or a group, so Housing Market Social sends you the text and pictures at the scheduled time and you post them yourself.

Help Center: Can I post to my personal Facebook or Instagram profile?

80 CHAPTER 80

Share a listing on social media

Housing Market Social add-on | For agents | Watch the video

OVERVIEW

Open New post, write or start from a listing, choose the accounts, then save a draft, post now, pick a time, use an account's queue or take a suggested time.

Choose New post. Write the text once, or start from one of your live listings: the text, the photos, the price and the link are filled in from the listing, and you choose the tone and the language of the text. A post can be words only, one picture, several pictures or videos in one swipeable post, one video, or a link to one of your listings.

Choose the accounts the post goes to. The preview shows how each network will show it, how long the text is against that network's limit, and anything the network would refuse. You can write different text for any one account.

Then choose when:

- Save as a draft: nothing is sent, and you can schedule it later.
- Post now: it goes out within a minute or so.
- Pick a date and time, in your time zone.
- Next free time in the queue: a queue is a set of days and times for one account, made under Posts.
- Best time: Social suggests good times for each account.

Scheduling needs an active subscription; saving a draft does not. The Calendar shows what is scheduled by month, week or day, and you can drag a scheduled post to another day. A post that is more than six hours late is not sent, and Social tells you so that you can choose a new time.

From the Help Center: **How do I schedule posts in Housing Market Social?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

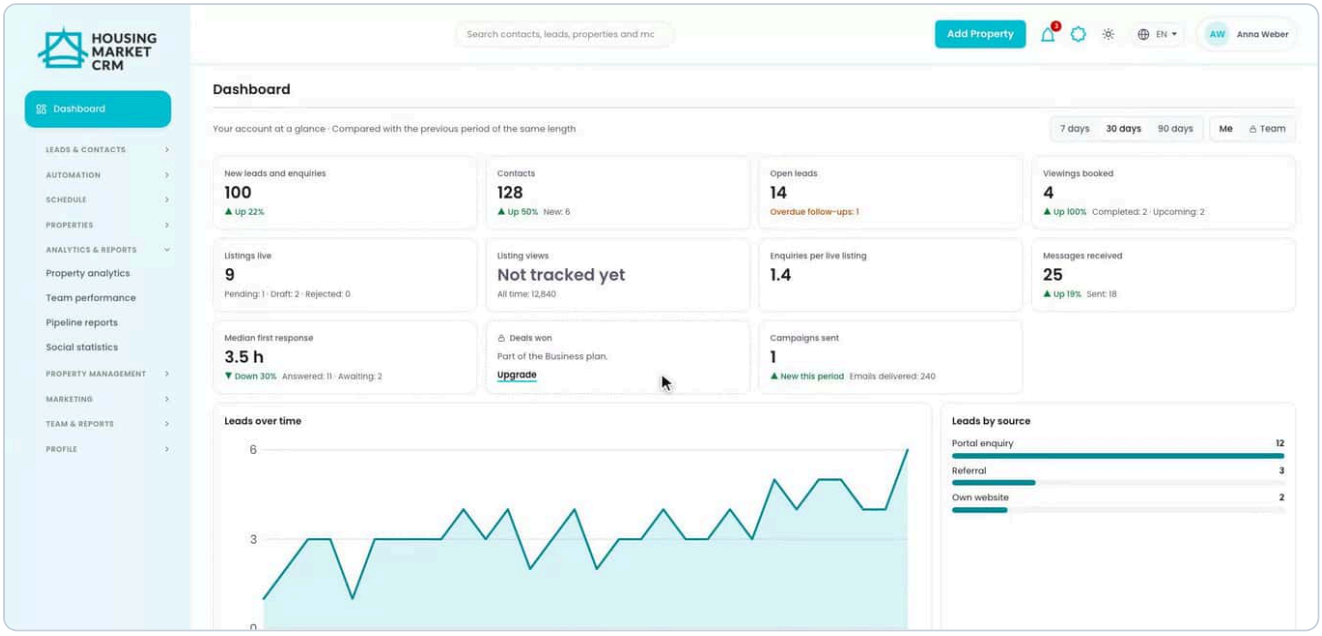


Figure 80.1 · Screen recorded 28 October 2026

2 Open **Marketing** in the left menu.

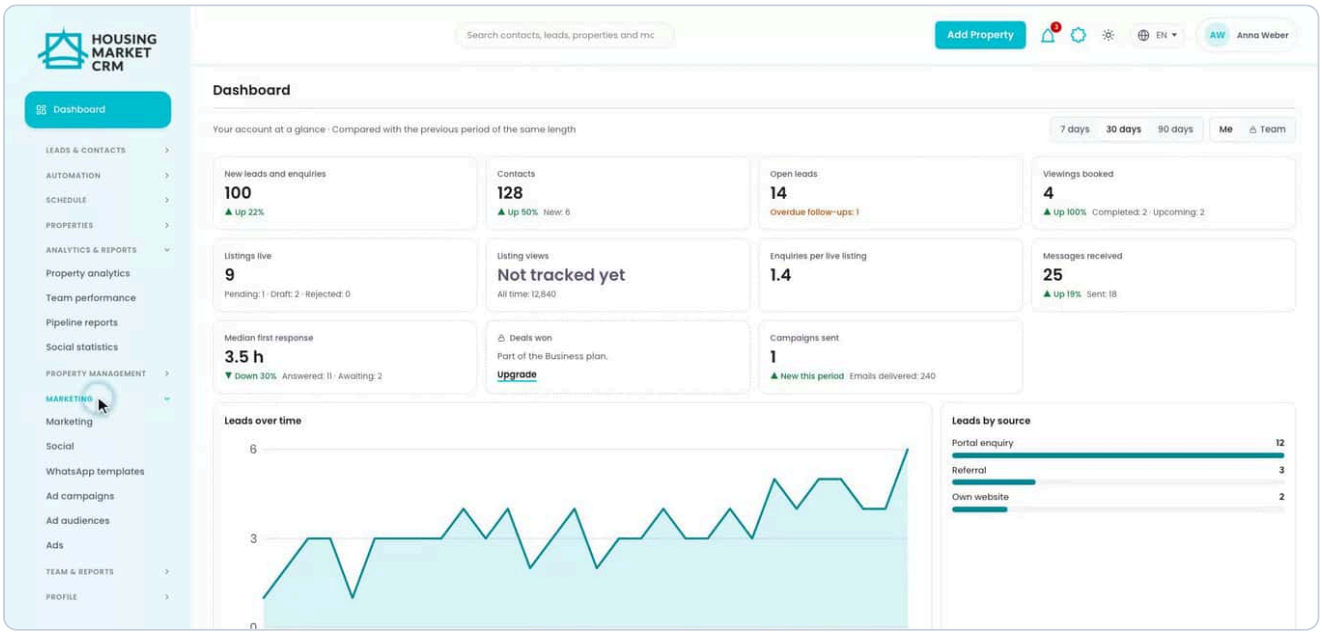


Figure 80.2 · Screen recorded 28 October 2026

3 Click **Social**.

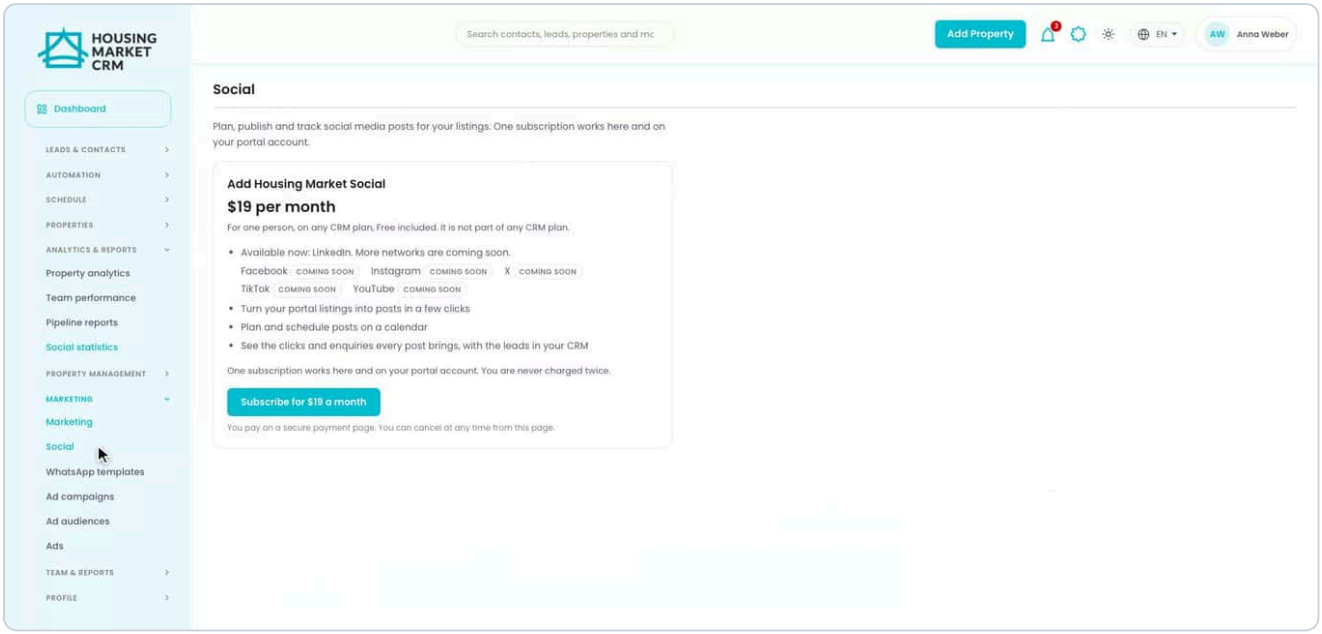


Figure 80.3 · Screen recorded 28 October 2026

4 **Housing Market Social** is an add-on: **19 USD per month**, on any CRM plan.

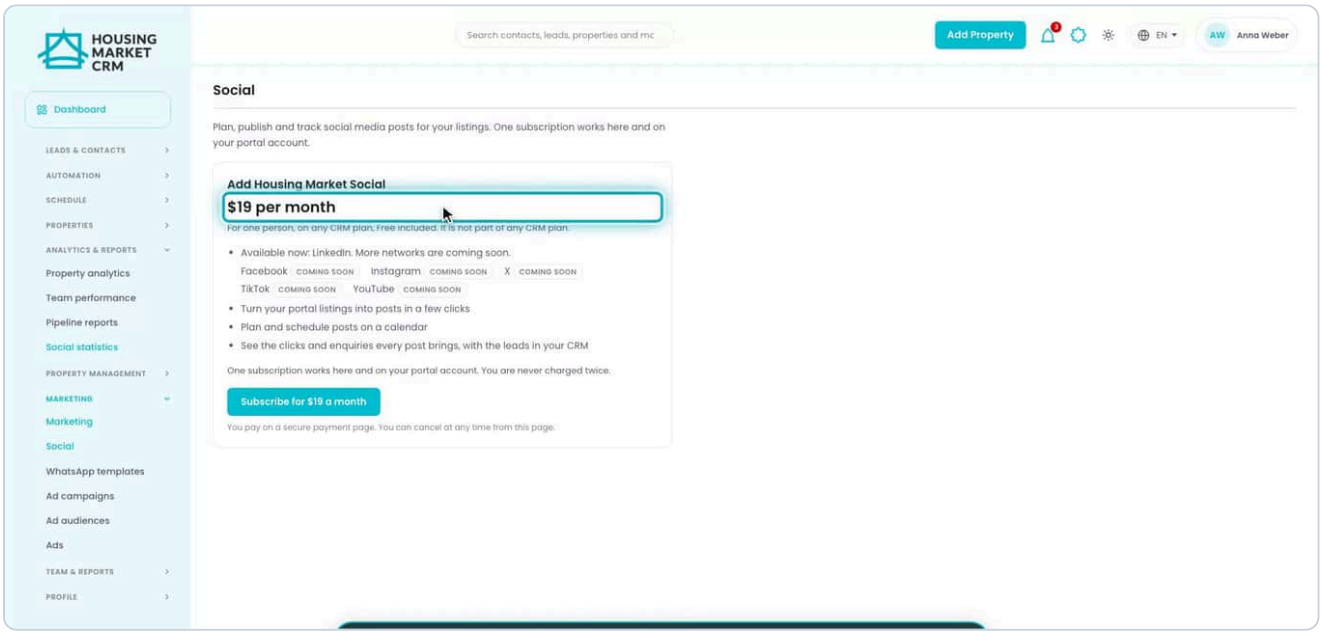


Figure 80.4 · Screen recorded 28 October 2026

5 LinkedIn works today. The other networks are coming soon.

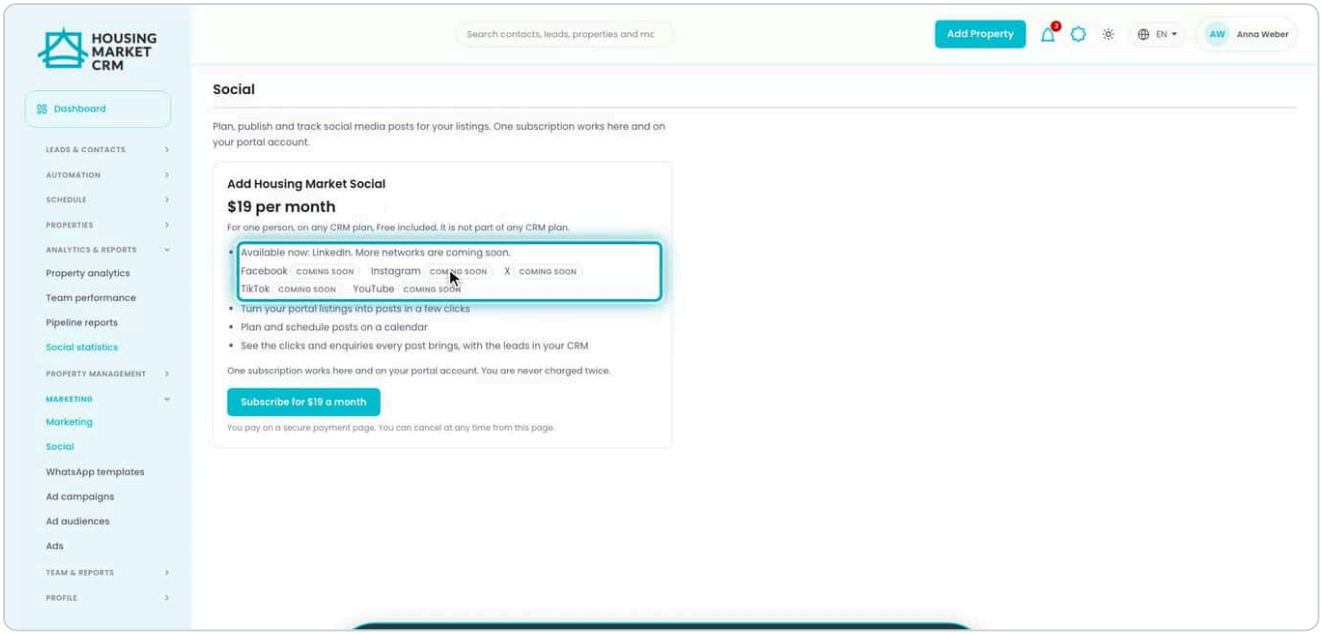


Figure 80.5 · Screen recorded 28 October 2026

6 Click Subscribe and pay on a secure payment page. Cancel at any time.

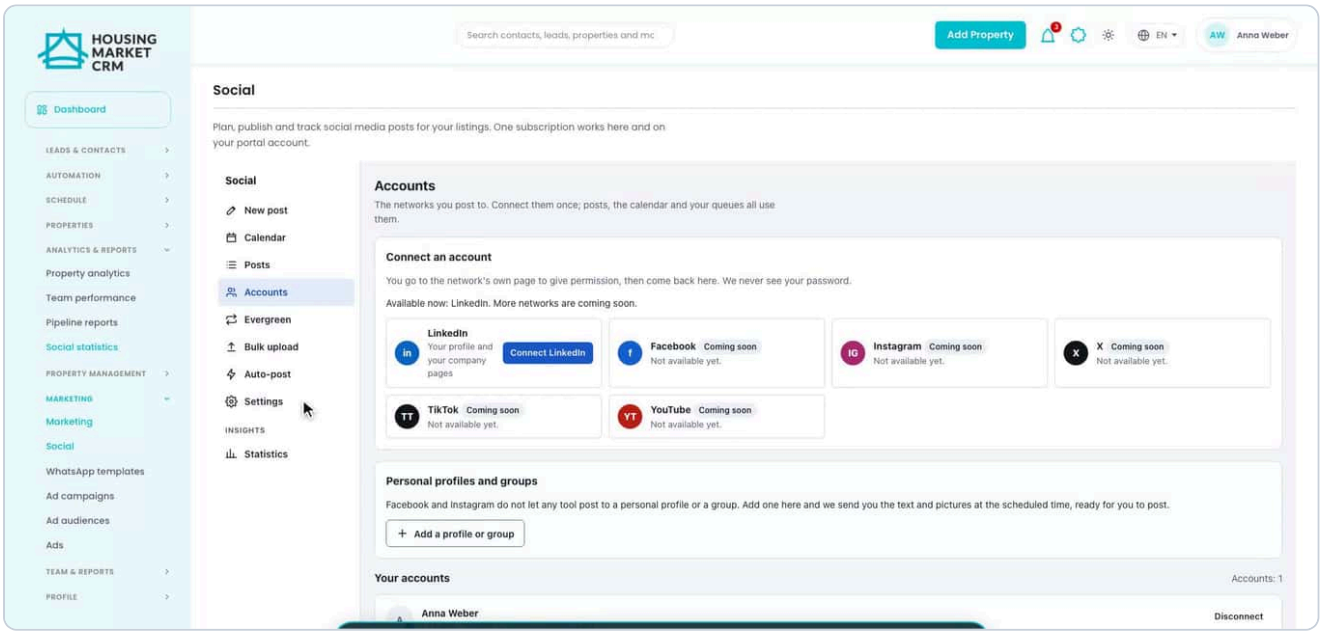


Figure 80.6 · Screen recorded 28 October 2026

7 Once you subscribe, **Social** opens here. Start with **Accounts**.

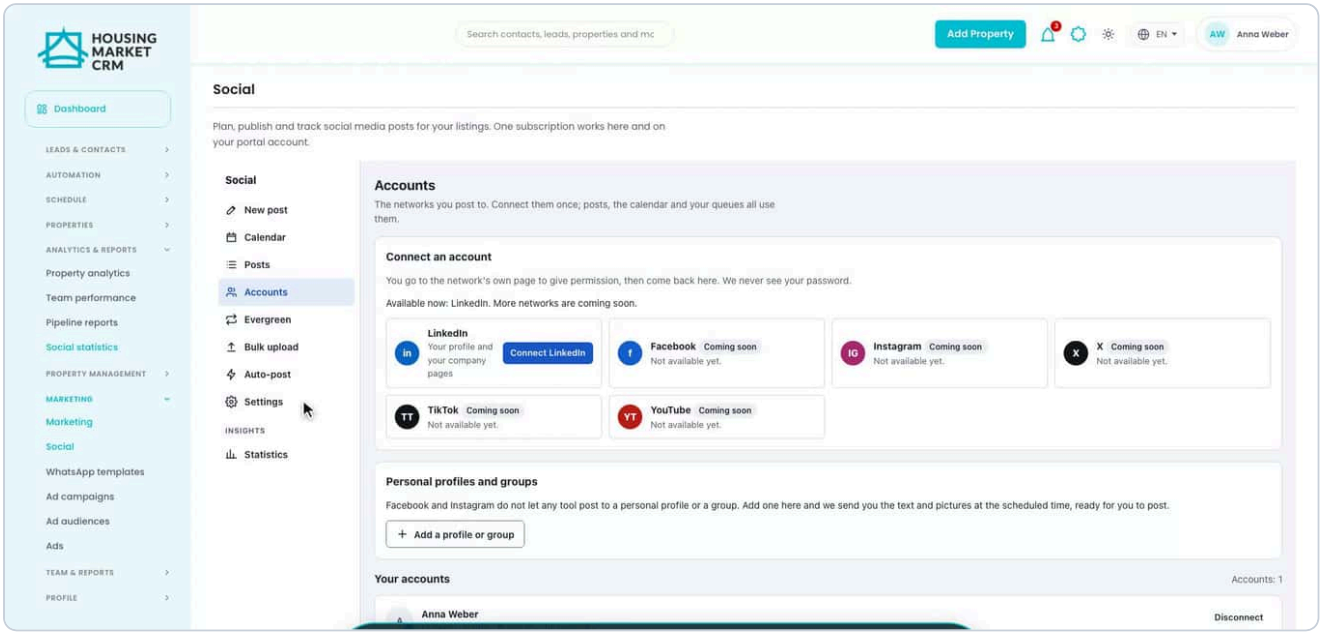


Figure 80.7 · Screen recorded 28 October 2026

8 Click **Connect LinkedIn** and give permission on LinkedIn's own page.

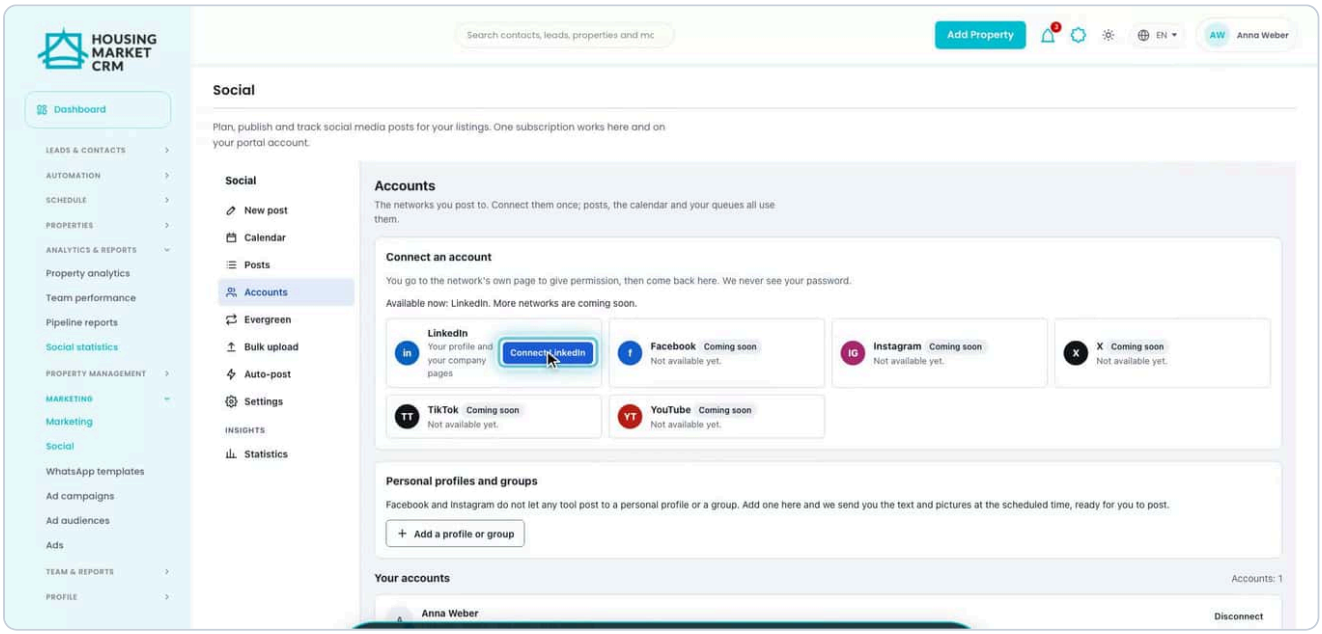


Figure 80.8 · Screen recorded 28 October 2026

9 Housing Market never sees your password.

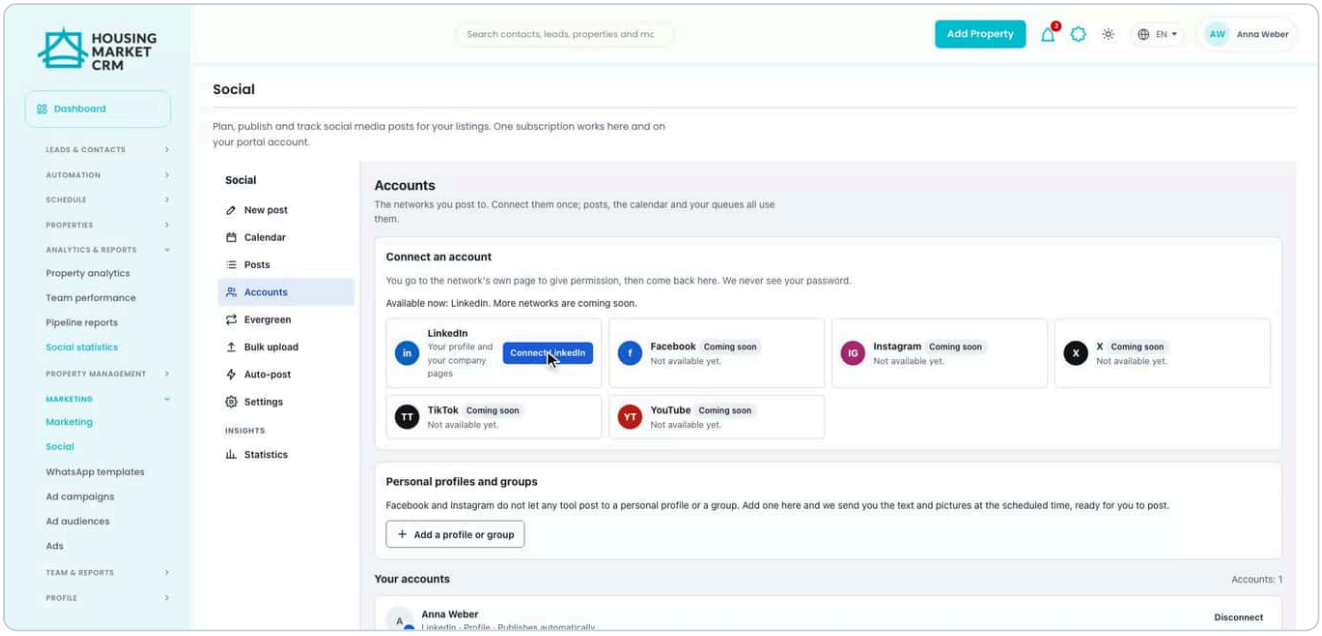


Figure 80.9 · Screen recorded 28 October 2026

10 Your connected account appears under Your accounts.

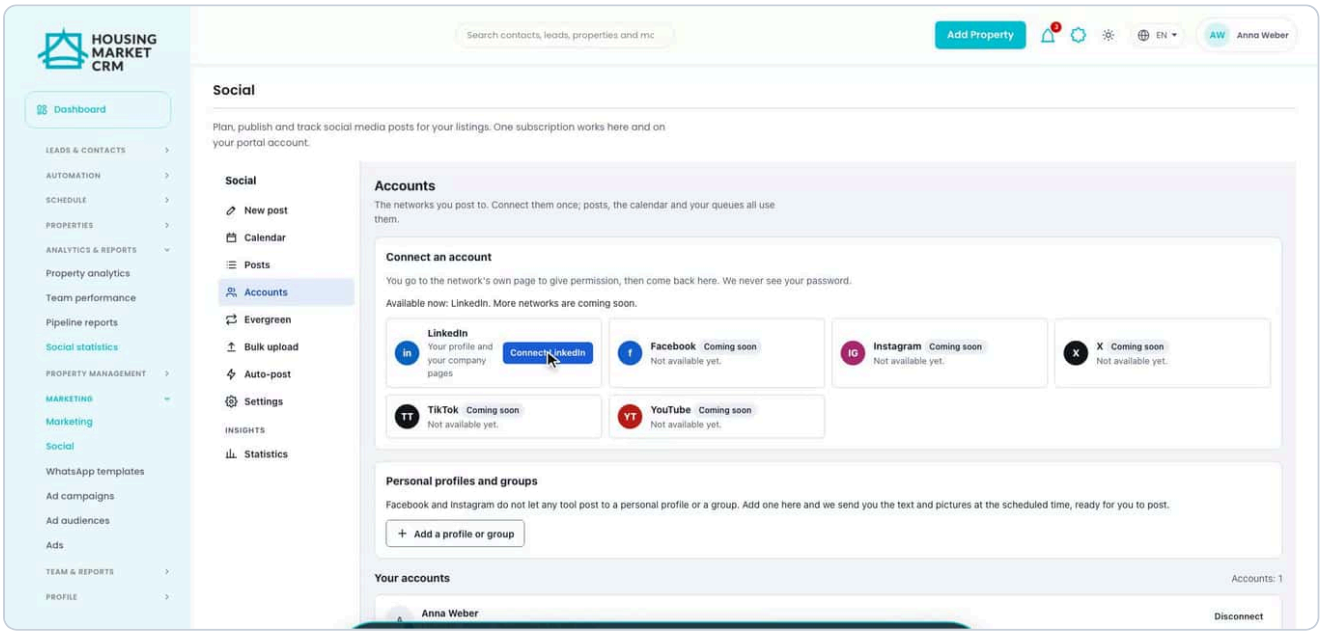


Figure 80.10 · Screen recorded 28 October 2026

11 Click **New post** and **From a listing**.

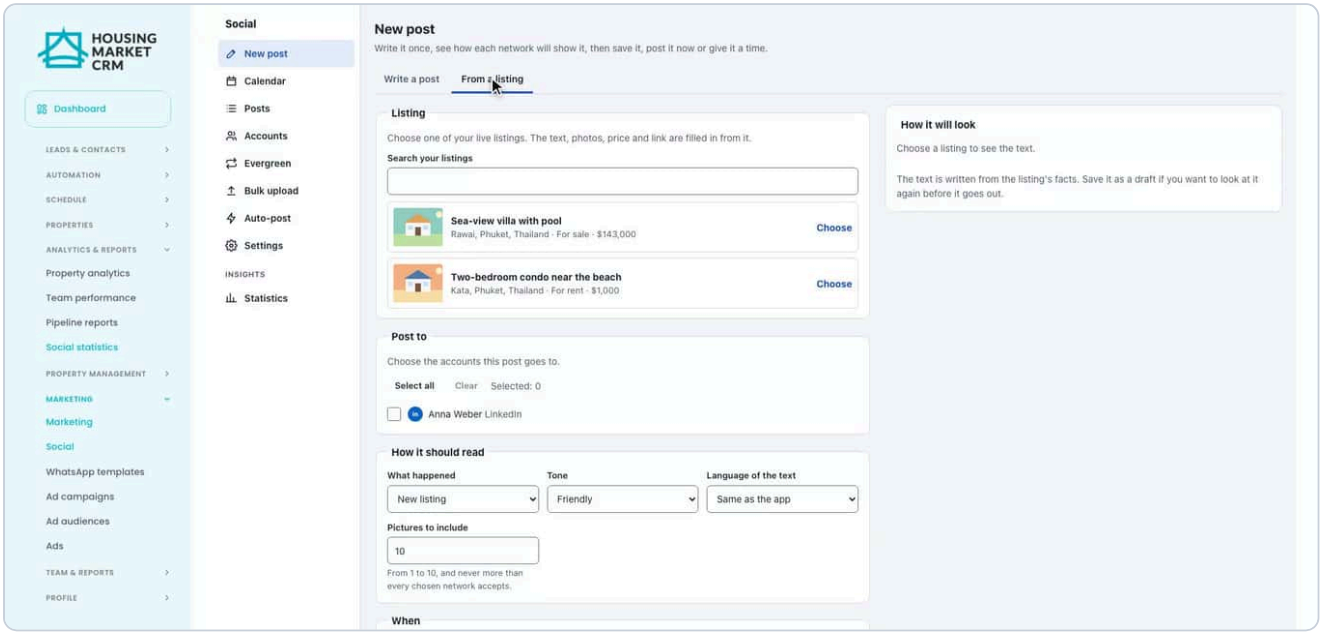


Figure 80.11 · Screen recorded 28 October 2026

12 Choose one of your **live listings**.

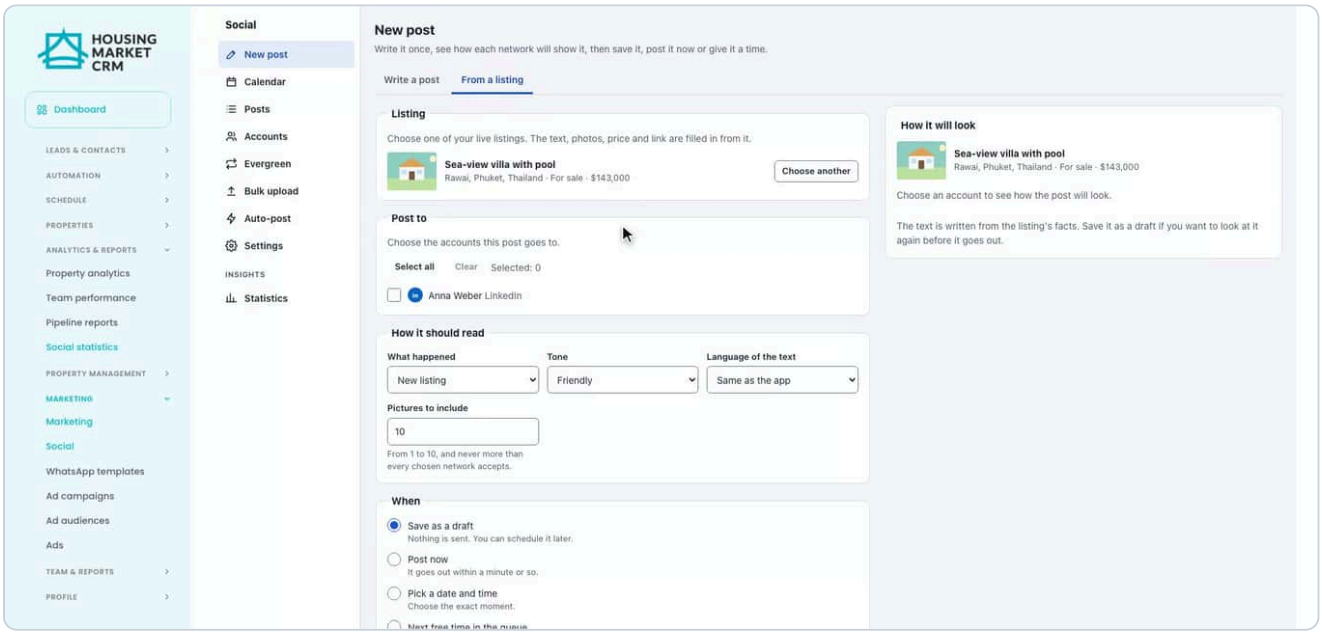


Figure 80.12 · Screen recorded 28 October 2026

13 Tick your **LinkedIn** account.

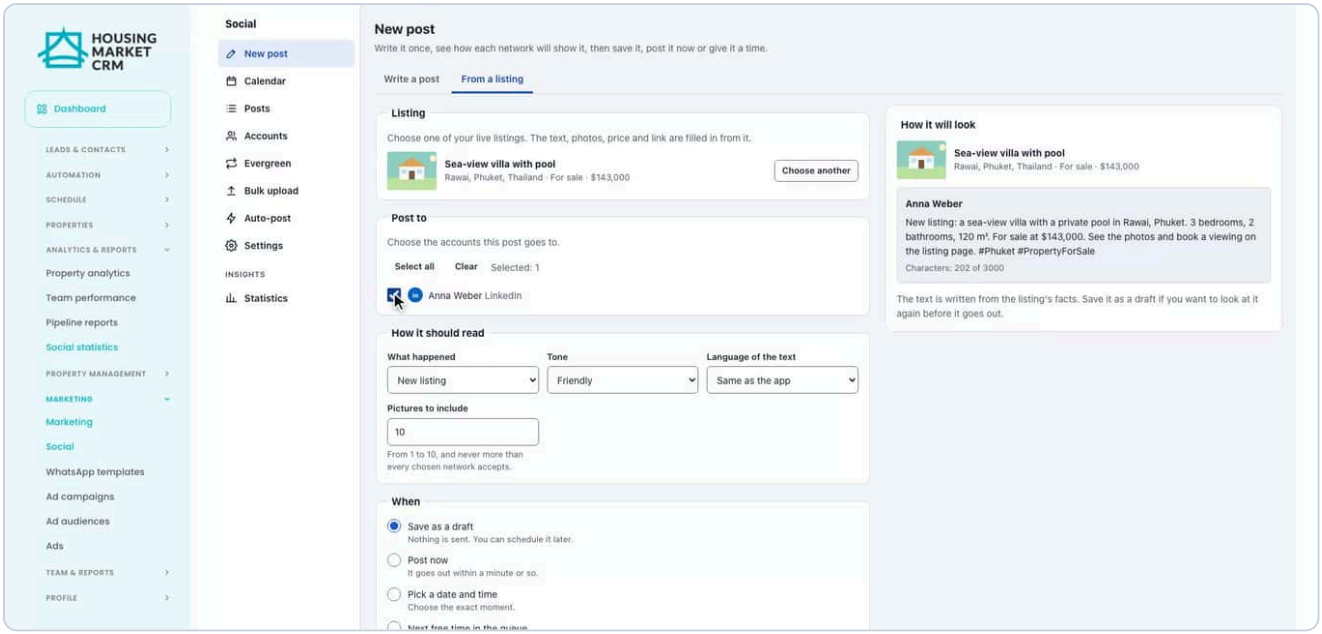


Figure 80.13 · Screen recorded 28 October 2026

14 The text, photos, price and link are **filled in from the listing**. Read the preview.

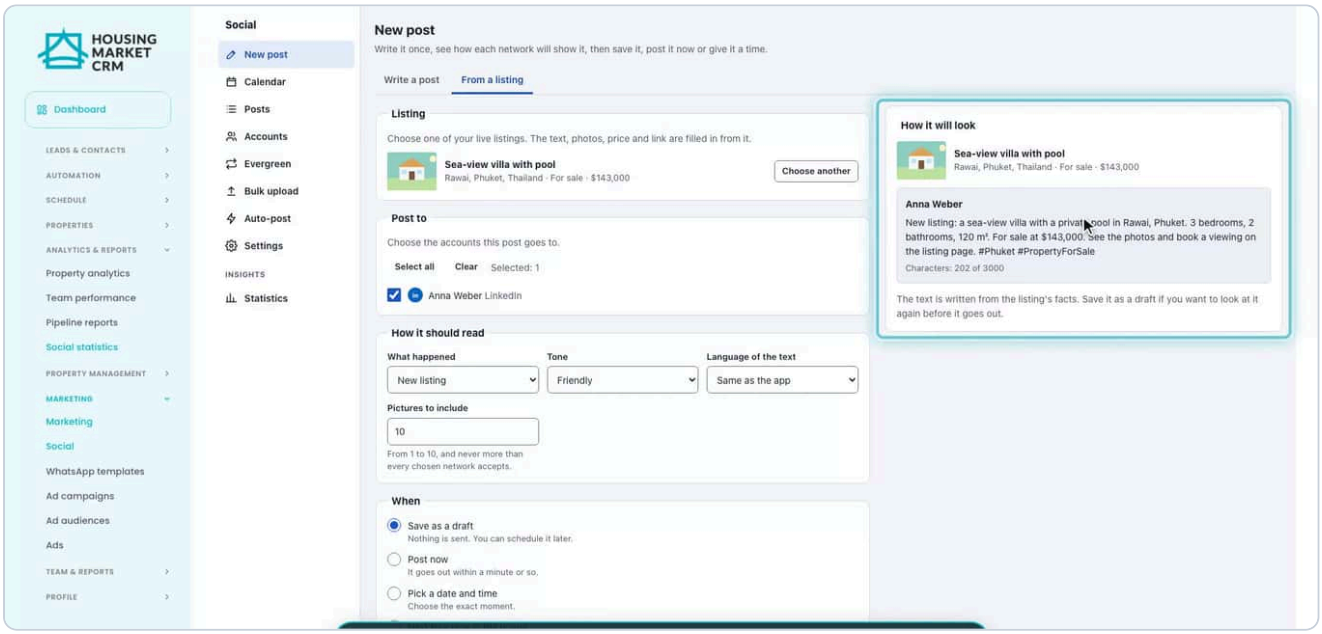


Figure 80.14 · Screen recorded 28 October 2026

15 Choose **what happened** and the **tone**, if you like.

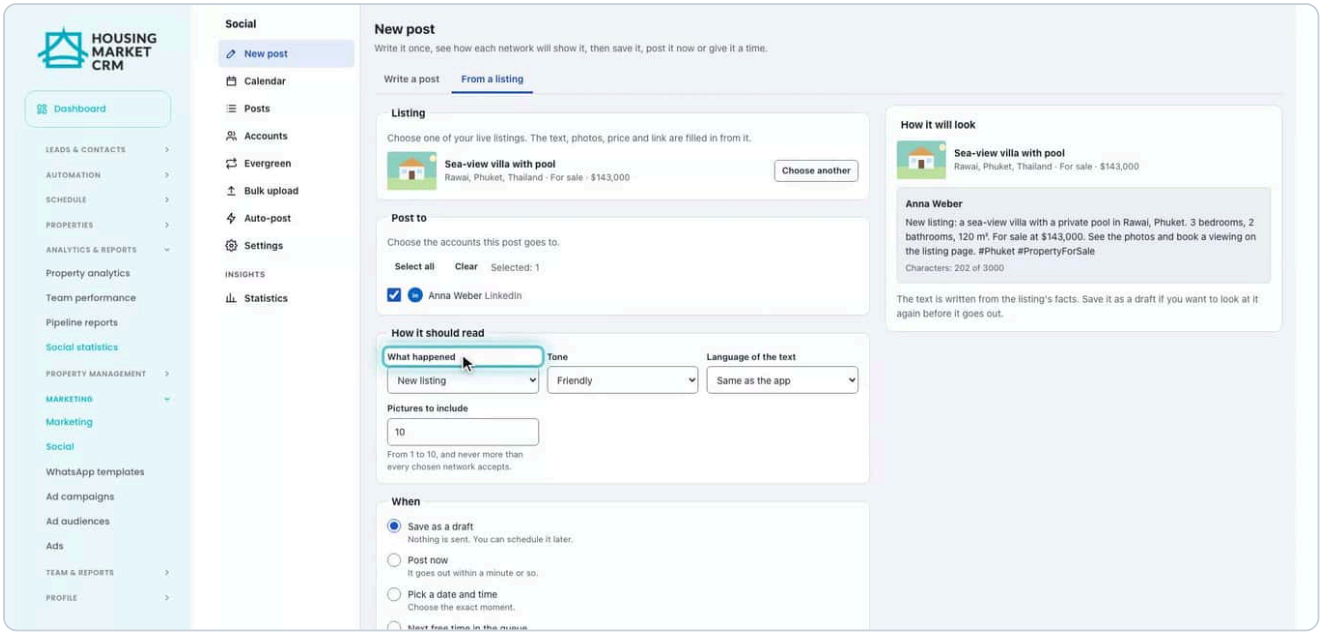


Figure 80.15 · Screen recorded 28 October 2026

16 Under **When**, pick a **date and time**.

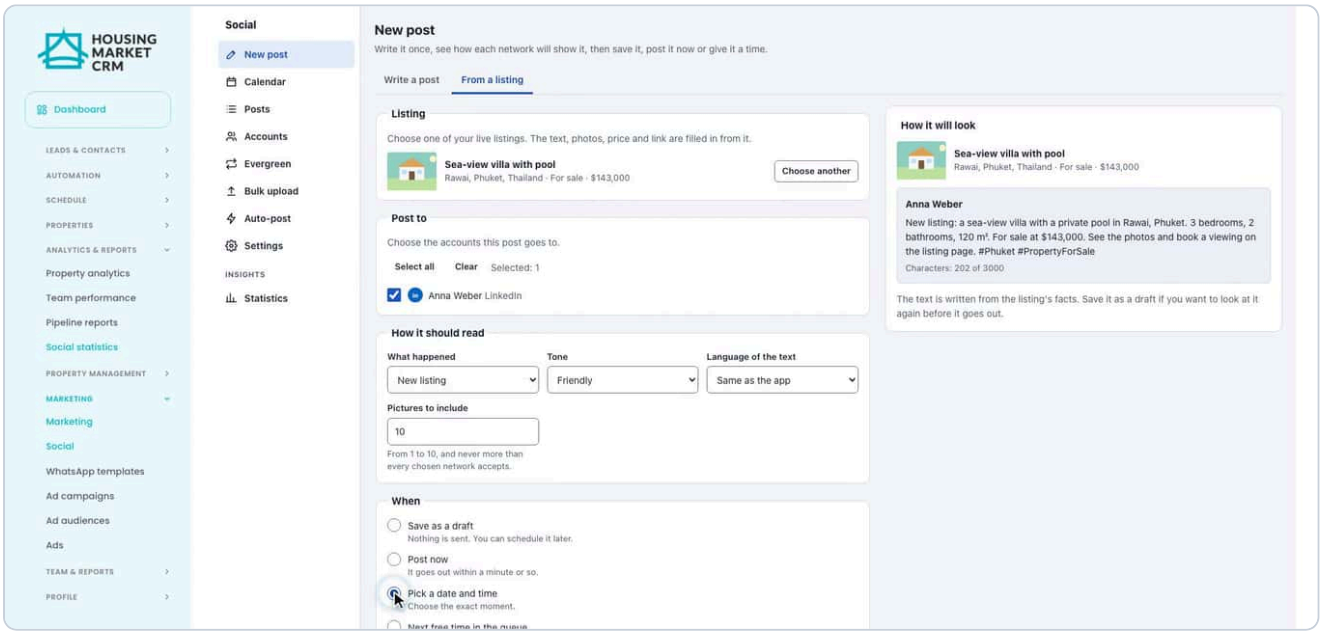


Figure 80.16 · Screen recorded 28 October 2026

17 Here: in two days, at 6 PM.

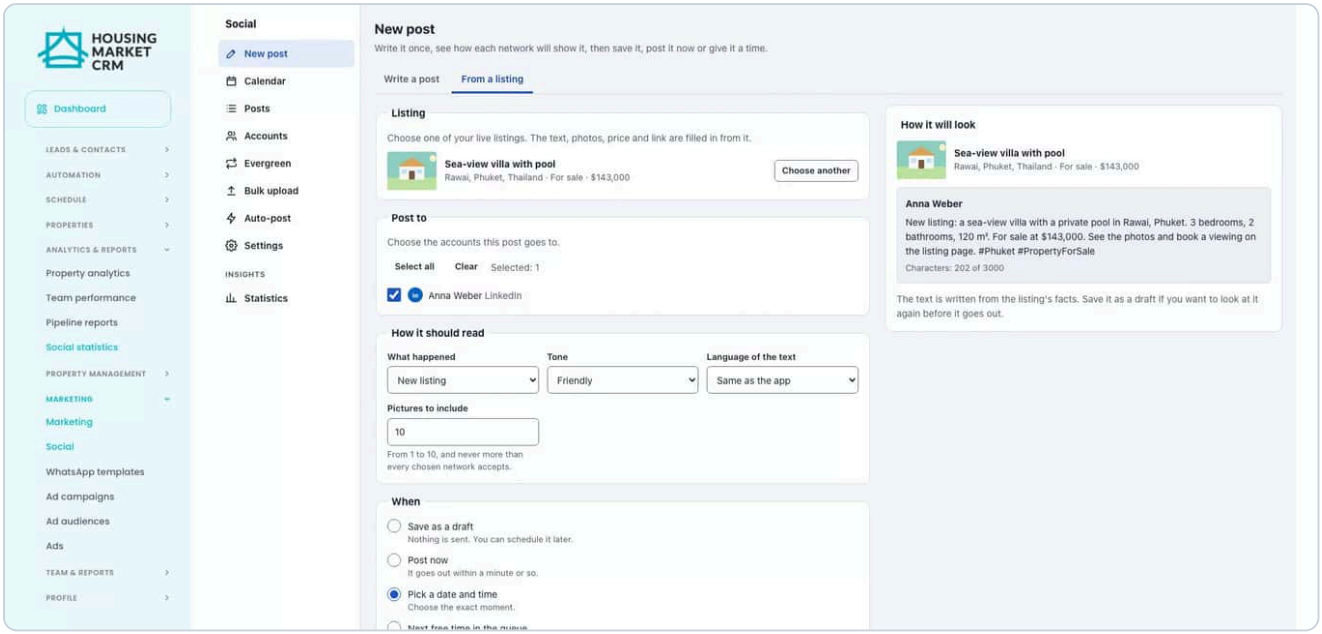


Figure 80.17 · Screen recorded 28 October 2026

18 Click **Schedule post**.

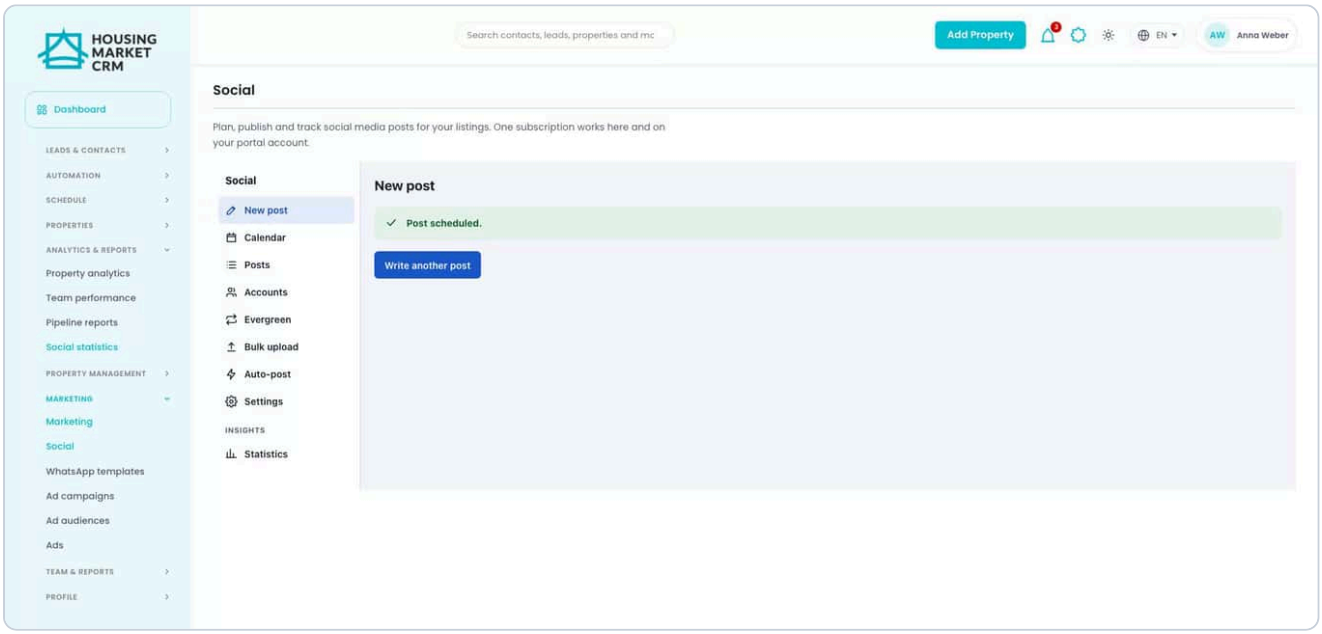


Figure 80.18 · Screen recorded 28 October 2026

19 The post is **scheduled**.

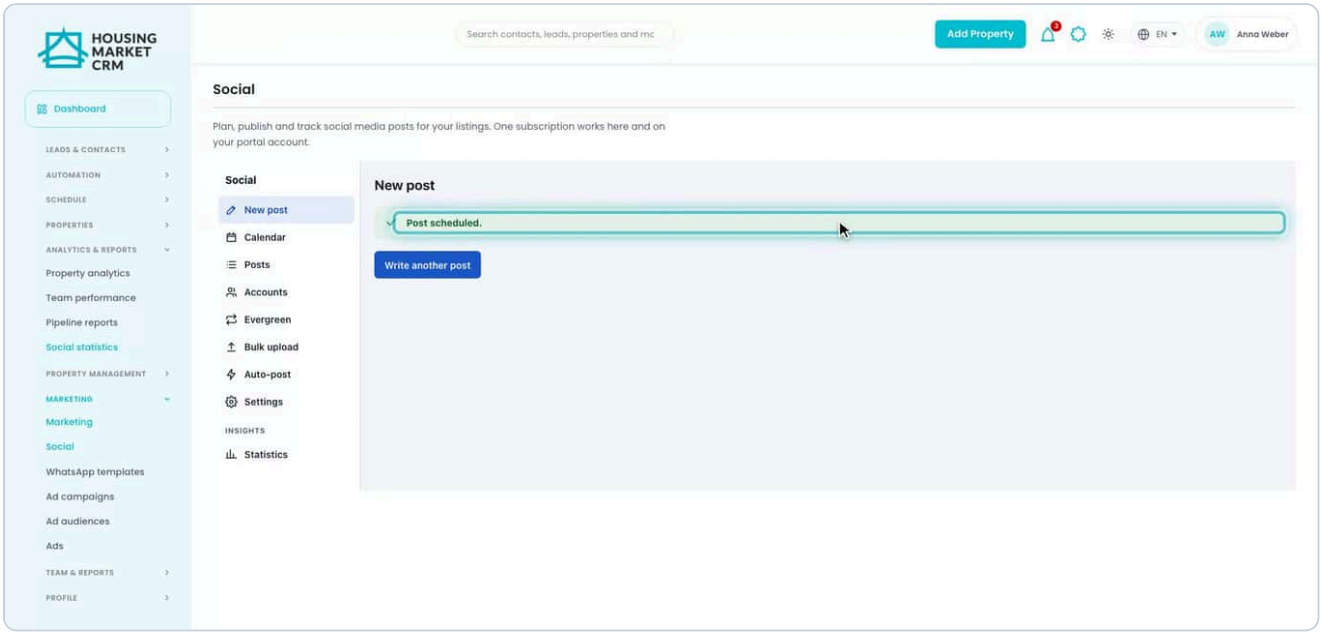


Figure 80.19 · Screen recorded 28 October 2026

20 Open the **Calendar**.

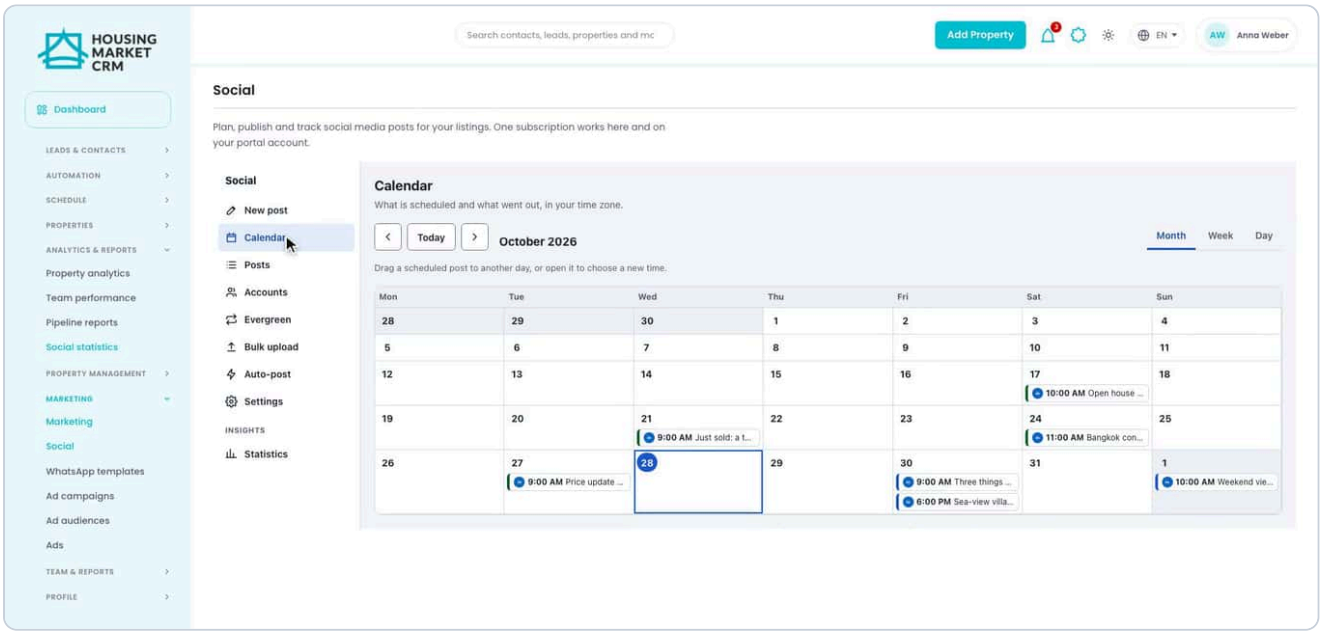


Figure 80.20 · Screen recorded 28 October 2026

21 See what is **scheduled** and what **went out**, in your time zone.

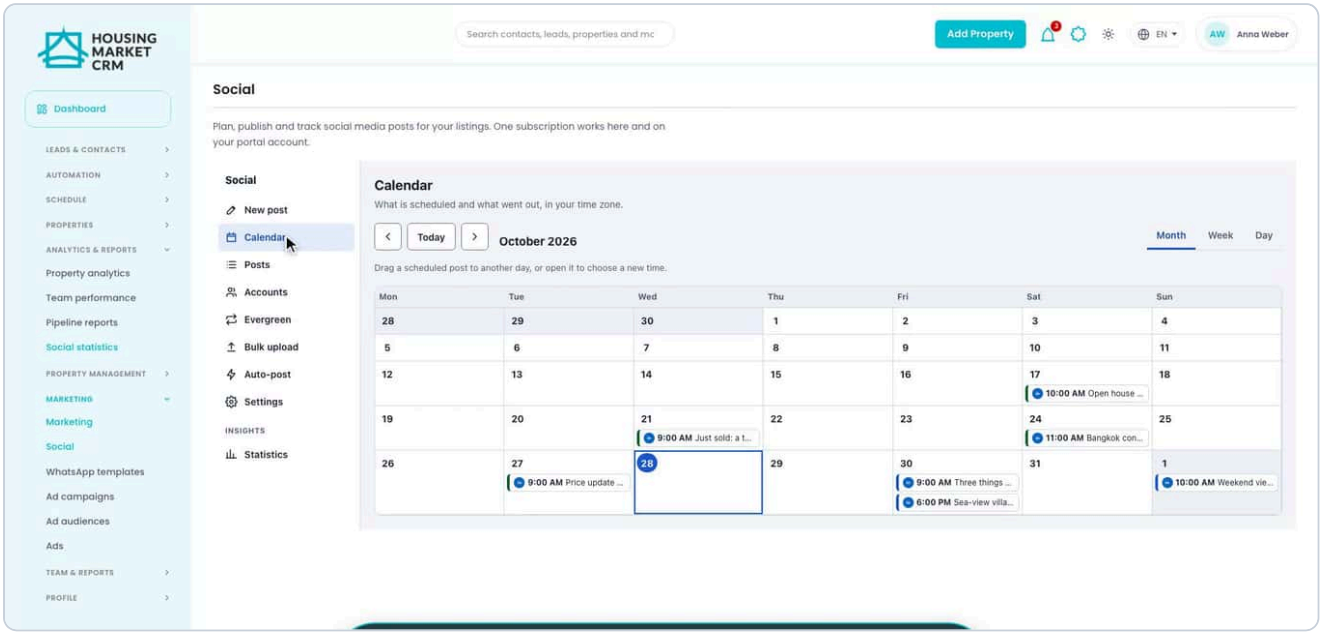


Figure 80.21 · Screen recorded 28 October 2026

22 Drag a scheduled post to another day, or open it to change its time.

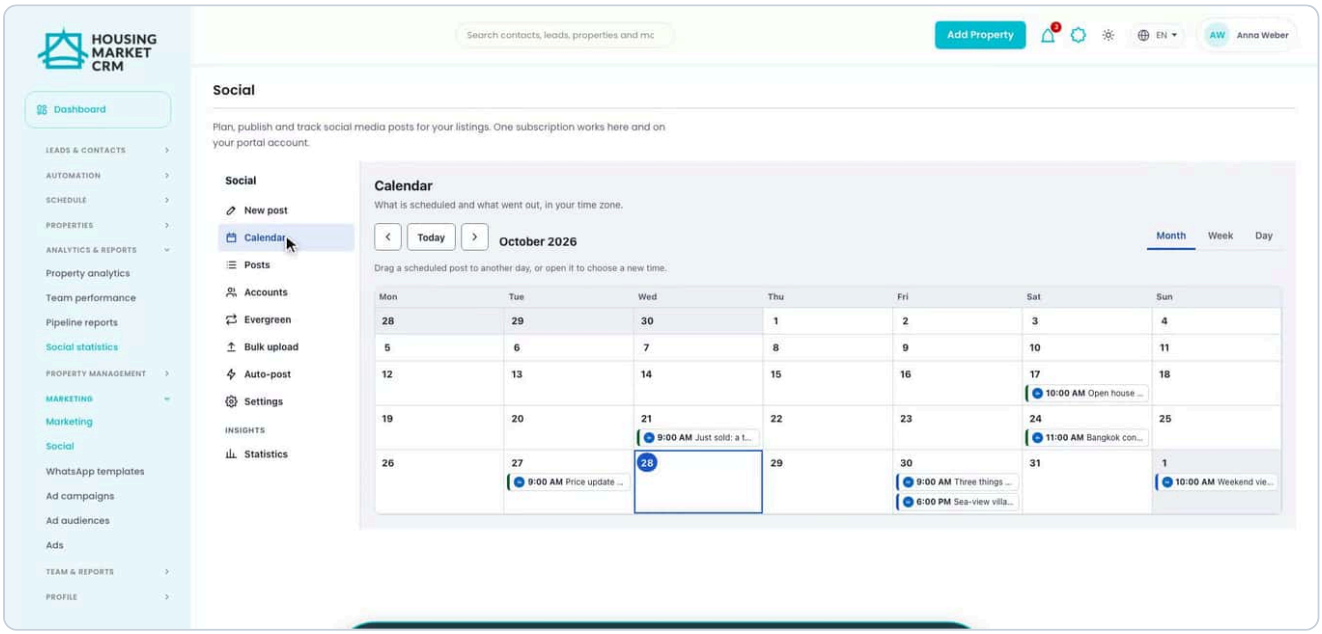


Figure 80.22 · Screen recorded 28 October 2026

23 Open **Statistics**.

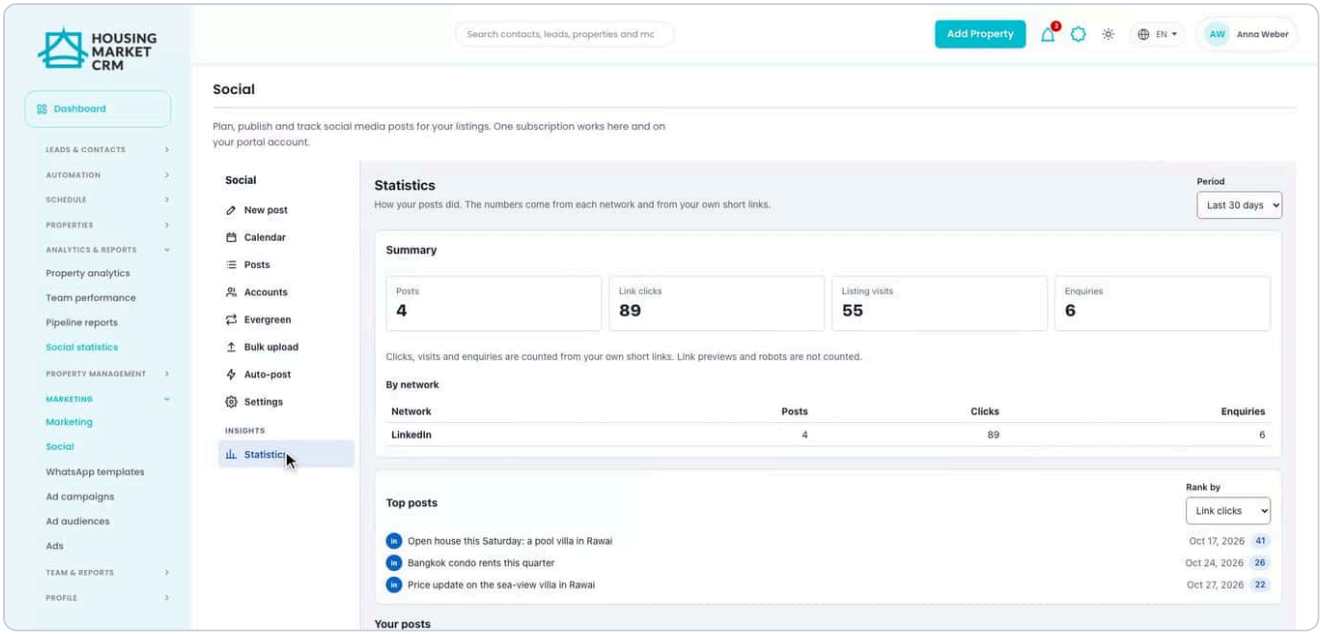


Figure 80.23 · Screen recorded 28 October 2026

24 See your posts' **link clicks**, **listing visits** and **enquiries**.

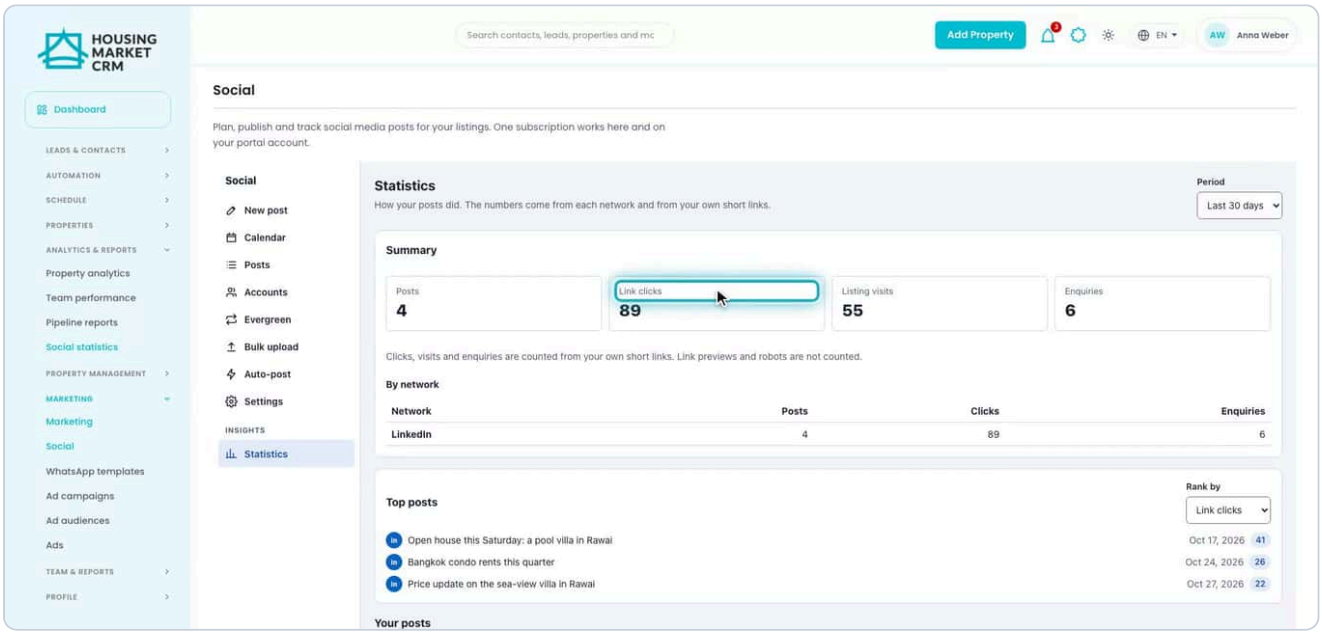


Figure 80.24 · Screen recorded 28 October 2026

25 **Top posts** shows which posts brought the most people.

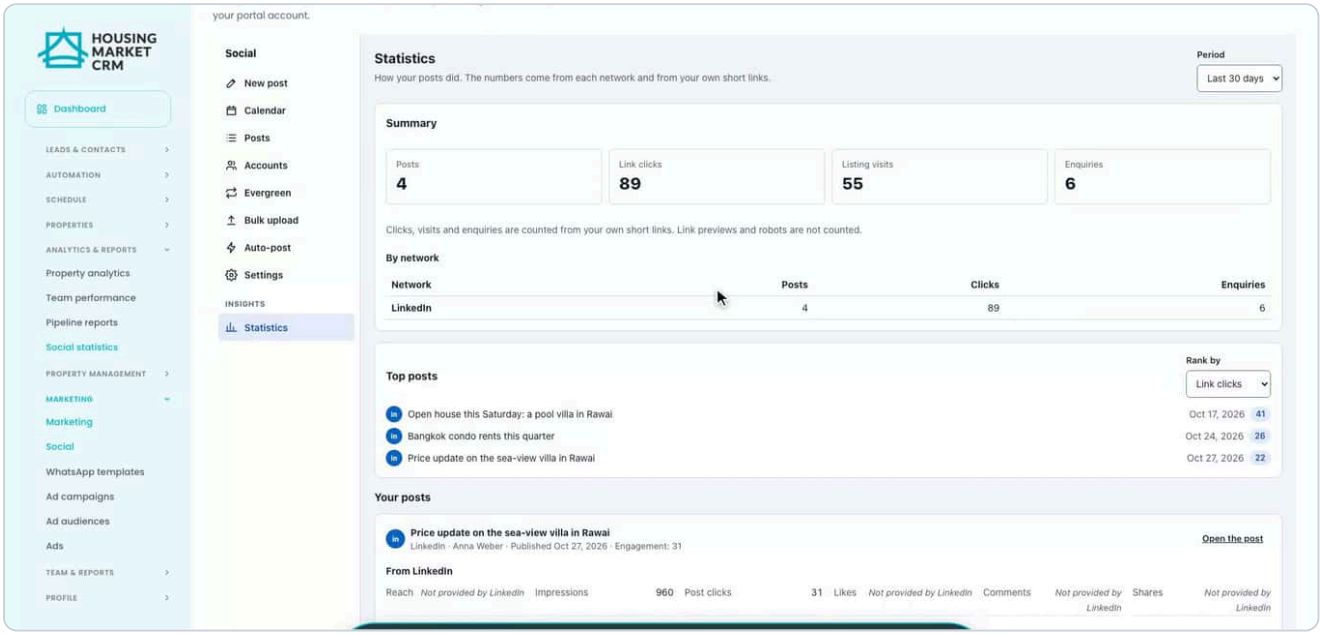


Figure 80.25 · Screen recorded 28 October 2026

RELATED HELP CENTER ARTICLES

What can I do with Housing Market Social?	faq.housingmarketgroup.com/faq/what-can-i-do-with-housing-market-social
How do auto-post rules work in Housing Market Social?	faq.housingmarketgroup.com/faq/how-do-auto-post-rules-work-in-housing-market-social

81 CHAPTER 81

Write a post with AI captions

Housing Market Social add-on | For agents | Watch the video

OVERVIEW

Yes. Write it for me is a helper in the New post screen that drafts post text and hashtags for each network you chose, in your language and tone. Nothing is posted until you read, change and use a draft.

Write it for me is a box in the New post screen. Say what the post is about in a few words, or choose one of your live listings, then choose a tone (professional, friendly, luxury or urgent), the language of the drafts and whether to add hashtags. Choose Write drafts and you get one draft for each network of the accounts you chose, already fitted to that network's length limit. The drafts can be written in any of the seventeen languages.

Nothing is posted or scheduled by the helper. A draft goes into the text box only when you choose Use this text, and you can change every word. AI writes from what you gave it, so check every detail, such as places and numbers, before you post. A draft that contains a detail you did not give, or wording we do not allow, is thrown away and not counted.

When you start from a listing, only its title, place, type, rooms, area and key facts are used. Its price, its street address and its photos are never sent. Write it for me writes text and hashtags only; it does not make pictures or videos.

The box shows how many AI drafts you have used this month. If a monthly allowance is used up, the button is disabled with a message and it starts again next month; this answer does not state an allowance.

Write it for me is new, and Housing Market Social carries a Beta notice in Housing Market CRM: it works, and we would like to hear what you think. It appears only where your Social screen offers it. If you do not see it, it is not open for your account yet.

From the Help Center: **What is "Write it for me" in Housing Market Social, and does it use AI?**

STEP BY STEP

1 In **Marketing > Social**, open **New post**.

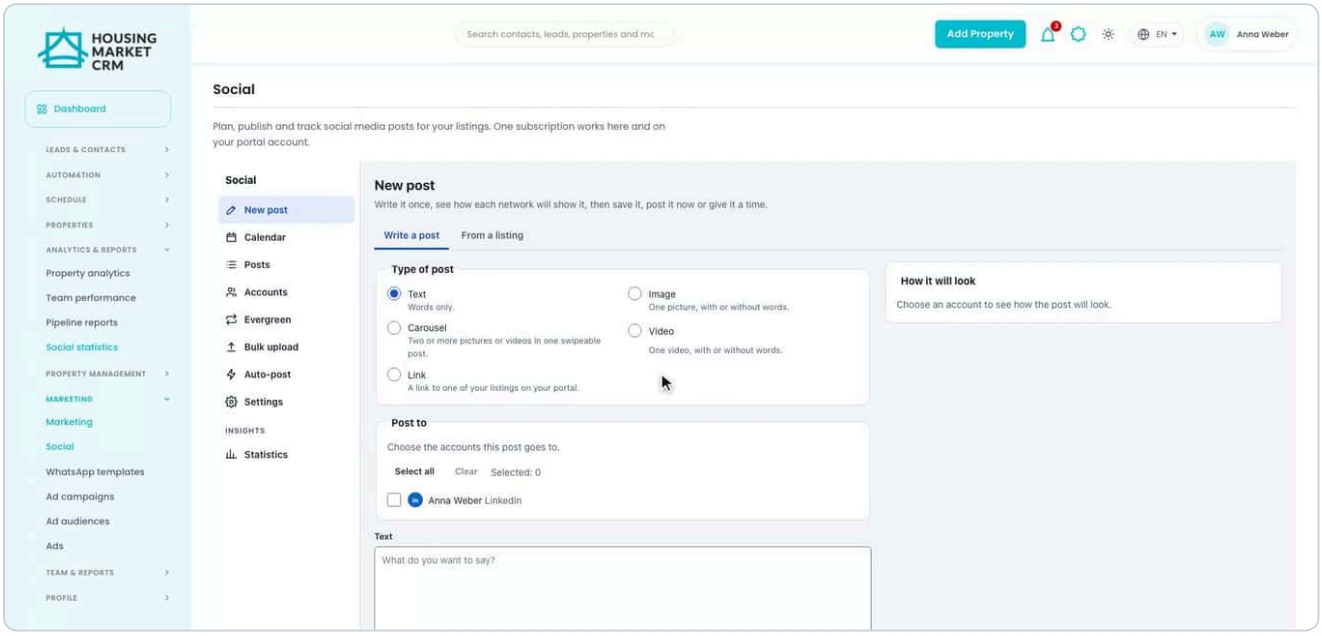


Figure 81.1 · Screen recorded 28 October 2026

2 Choose **Link**: a post that links one of your listings.

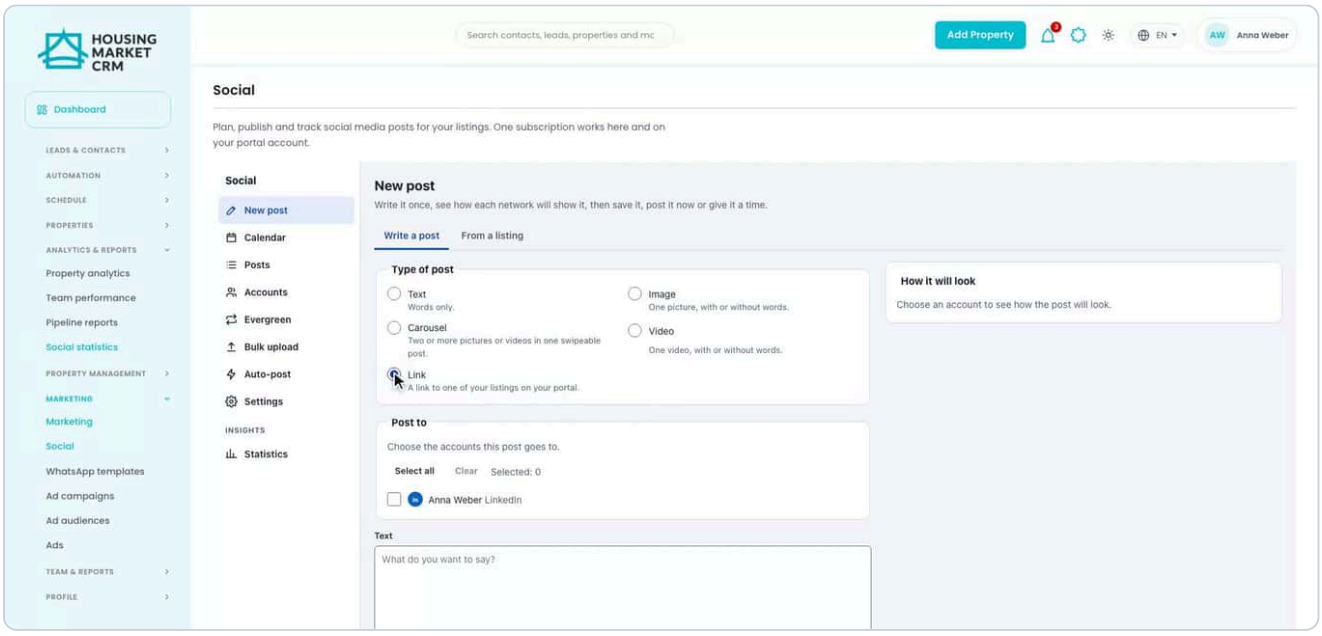


Figure 81.2 · Screen recorded 28 October 2026

3 Tick your **LinkedIn** account.

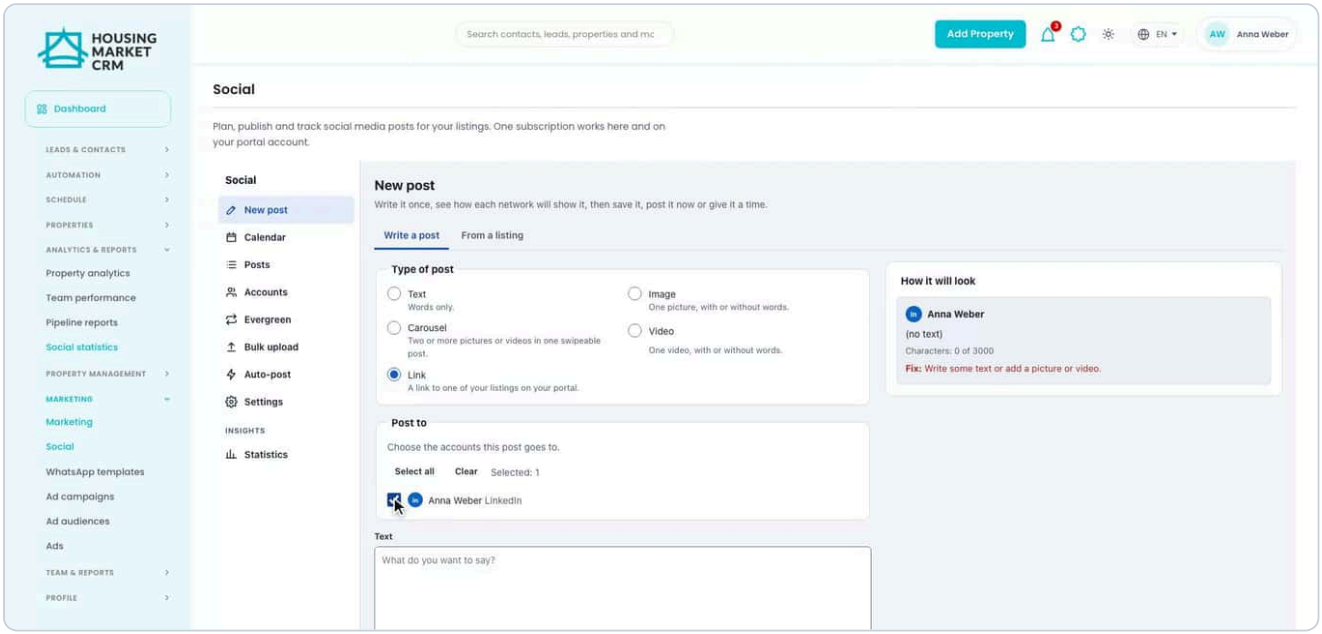


Figure 81.3 · Screen recorded 28 October 2026

4 Under **Listing**, find one of your **live listings** and choose it.

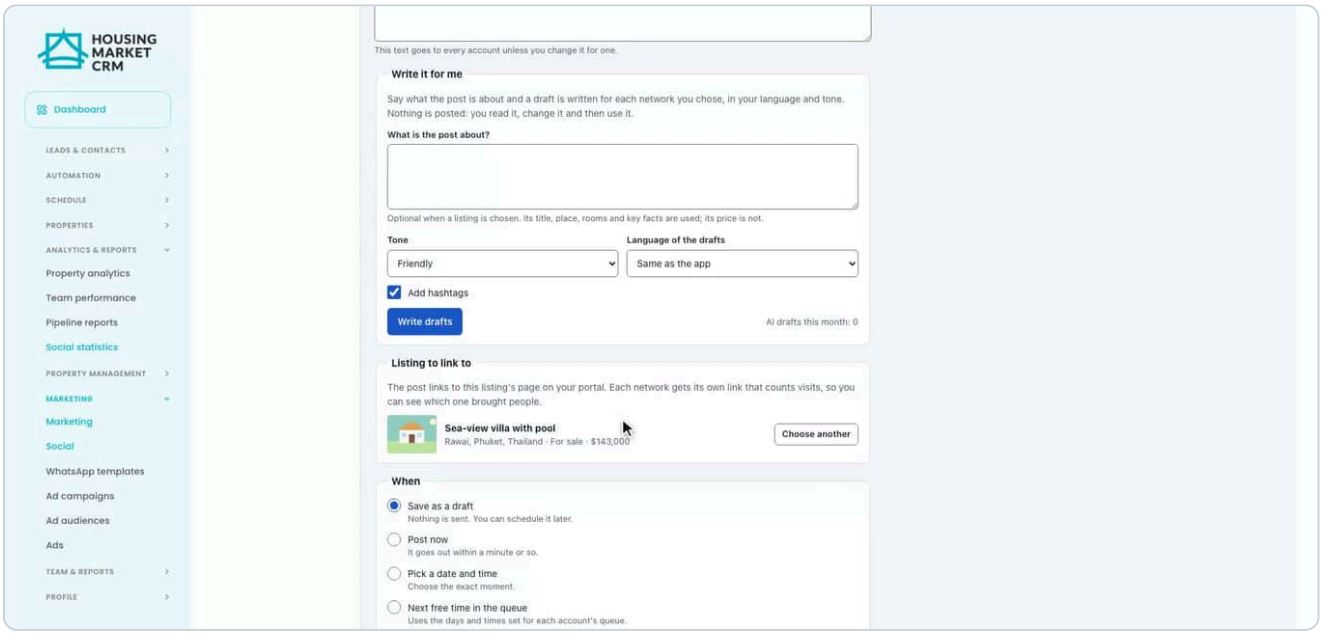


Figure 81.4 · Screen recorded 28 October 2026

5 Now use **Write it for me**.

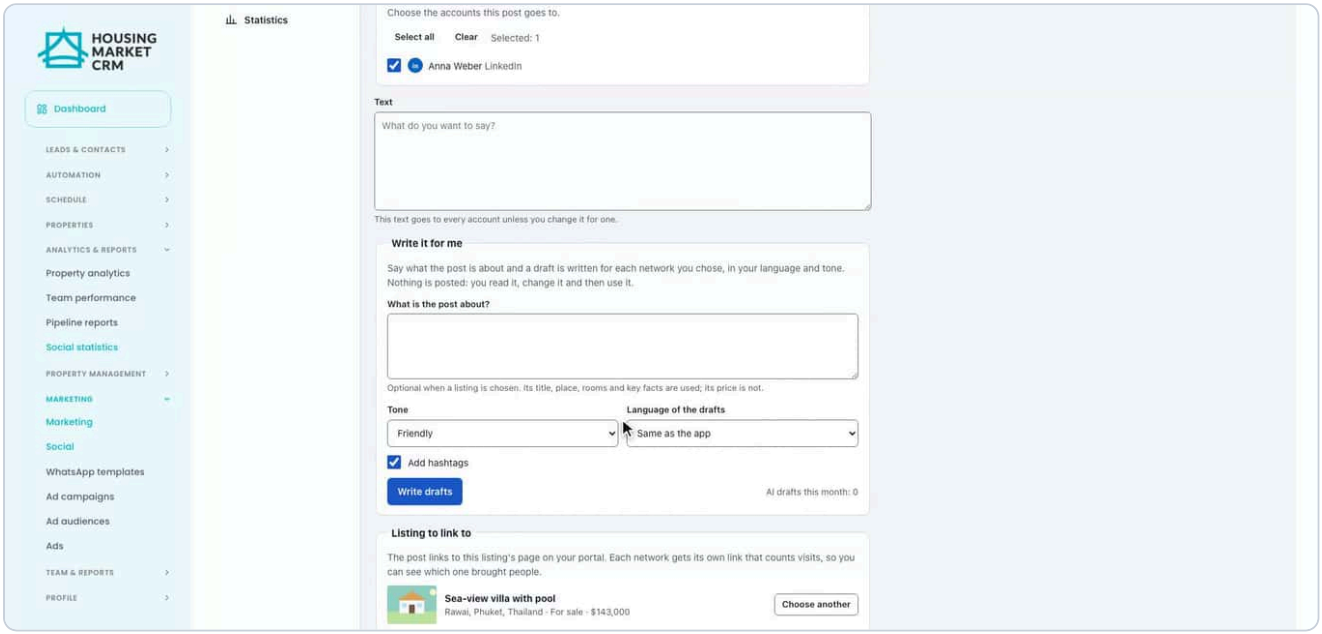


Figure 81.5 · Screen recorded 28 October 2026

6 Say in a few words what the post is about.

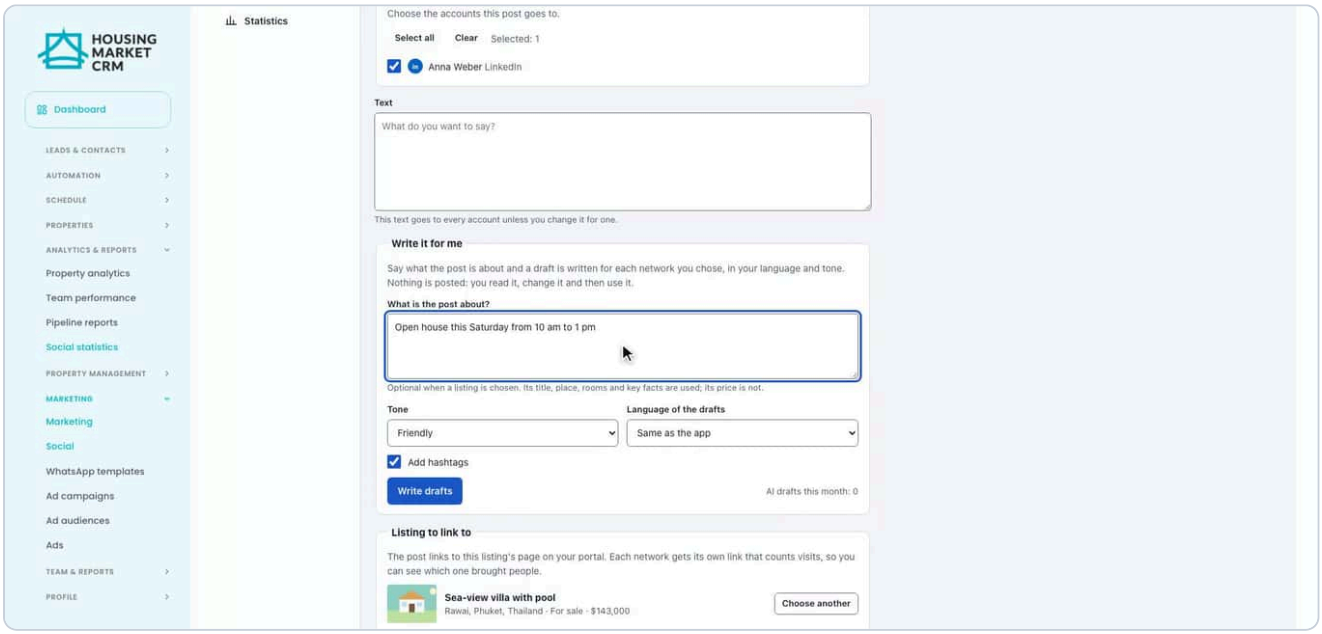


Figure 81.6 · Screen recorded 28 October 2026

7 Pick a **tone** and the **language**. **Add hashtags** is ticked.

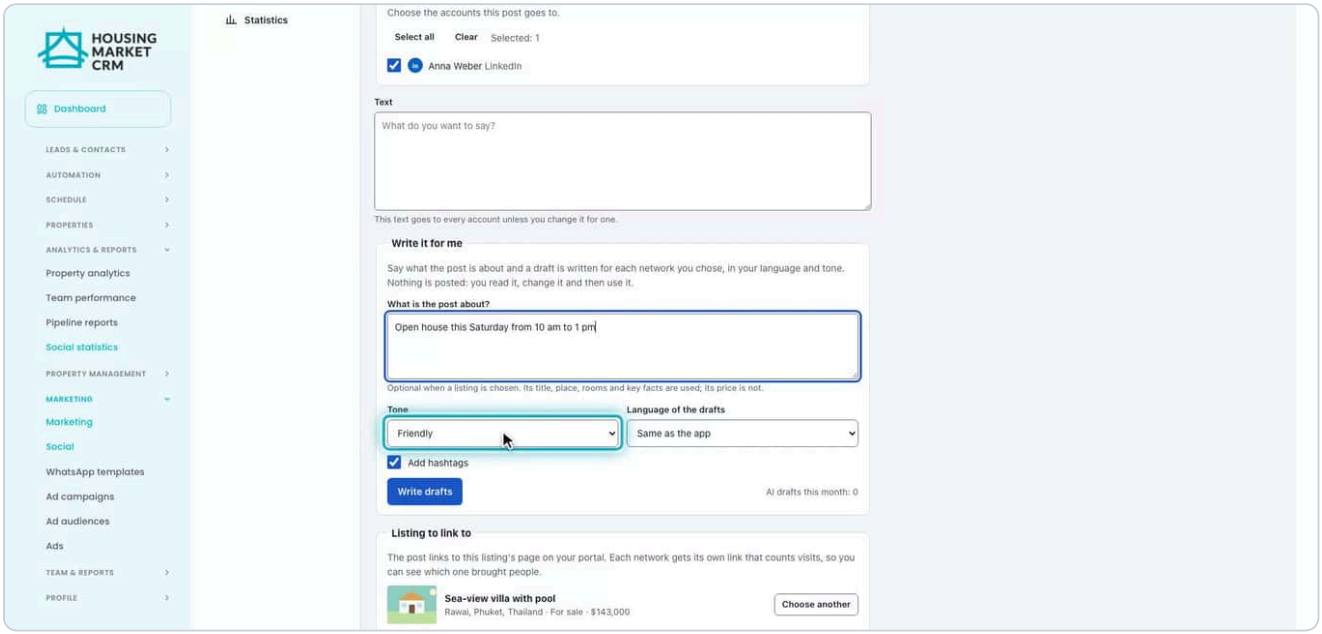


Figure 81.7 · Screen recorded 28 October 2026

8 Click **Write drafts**.

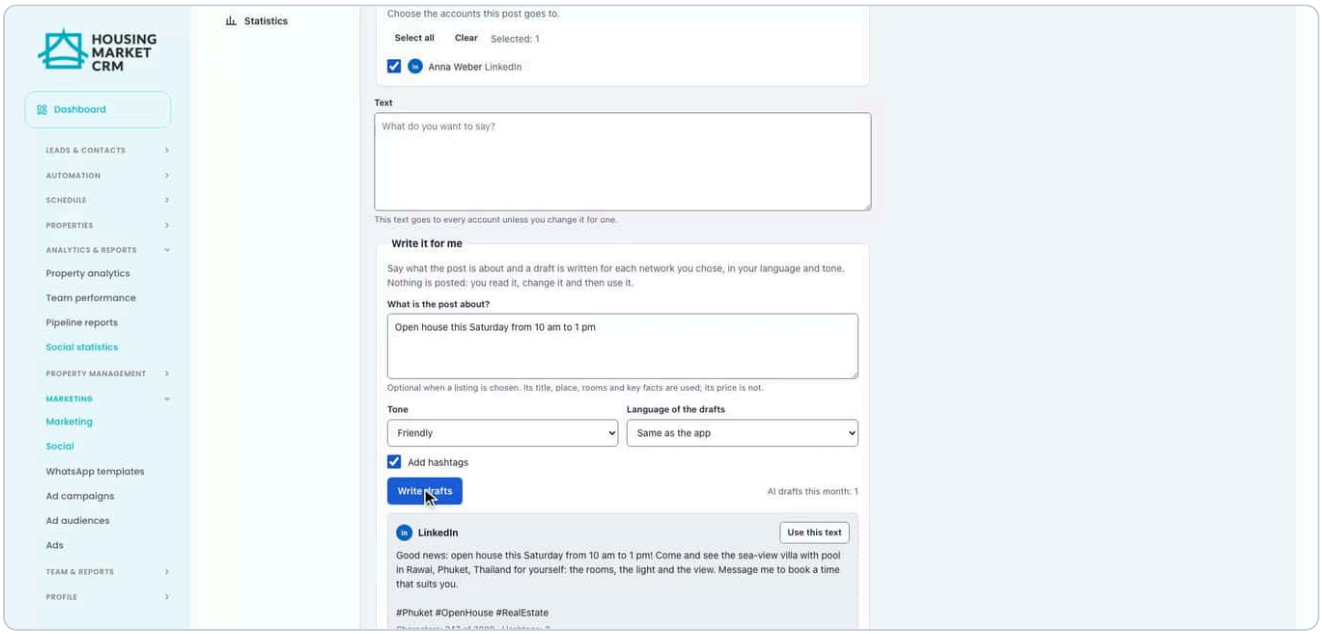


Figure 81.8 · Screen recorded 28 October 2026

9 A **LinkedIn draft** with hashtags. Your listing's **price is never sent**.

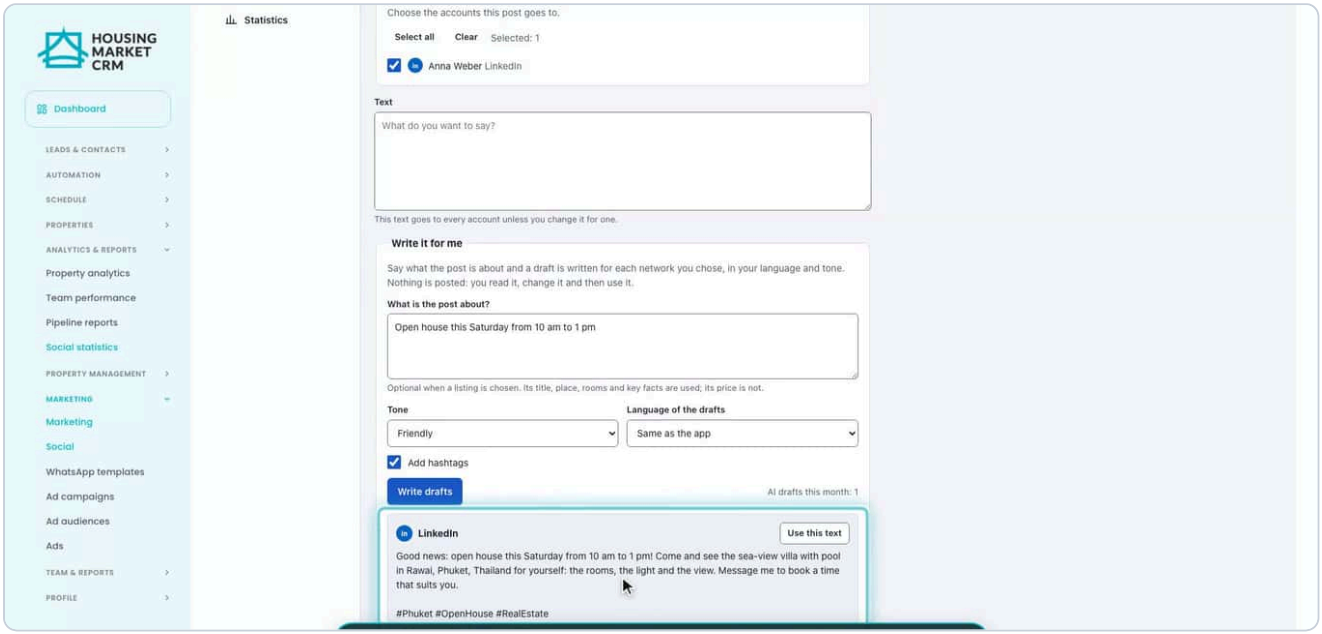


Figure 81.9 · Screen recorded 28 October 2026

10 This counts your **AI drafts this month**.

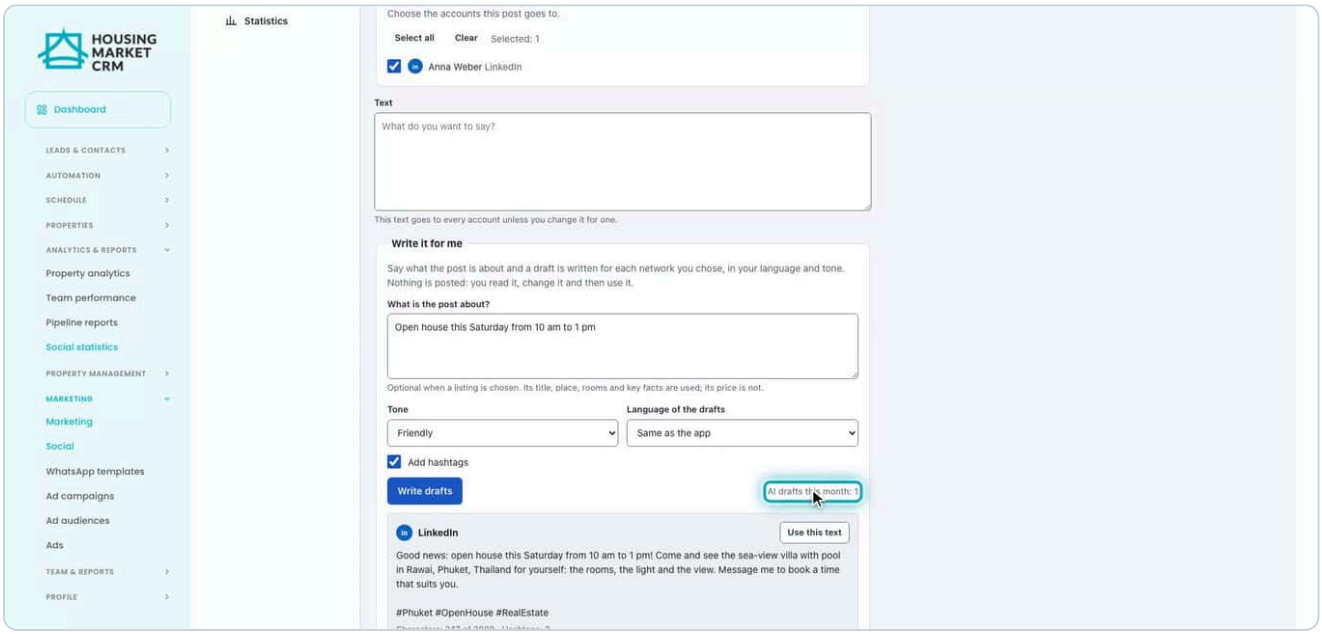


Figure 81.10 · Screen recorded 28 October 2026

11 Click **Use this text.**

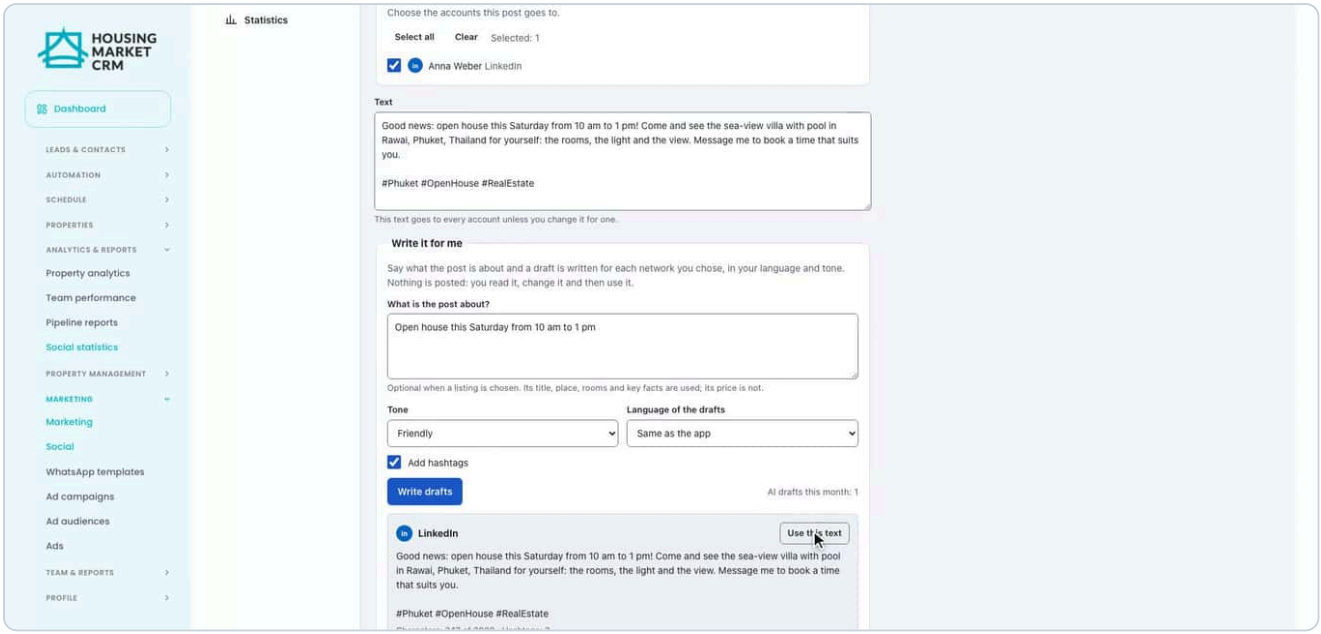


Figure 81.11 · Screen recorded 28 October 2026

12 The draft is in the text box. **Change anything** you like.

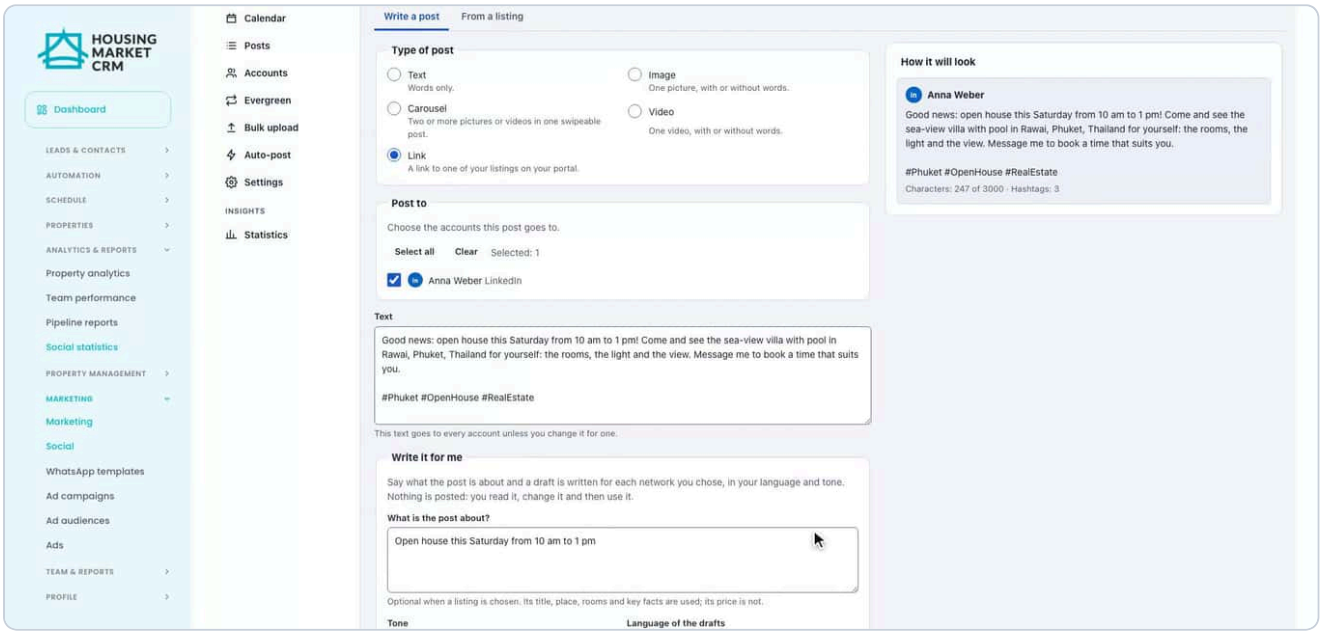


Figure 81.12 · Screen recorded 28 October 2026

13 Check **How it will look** on LinkedIn. AI can be wrong.

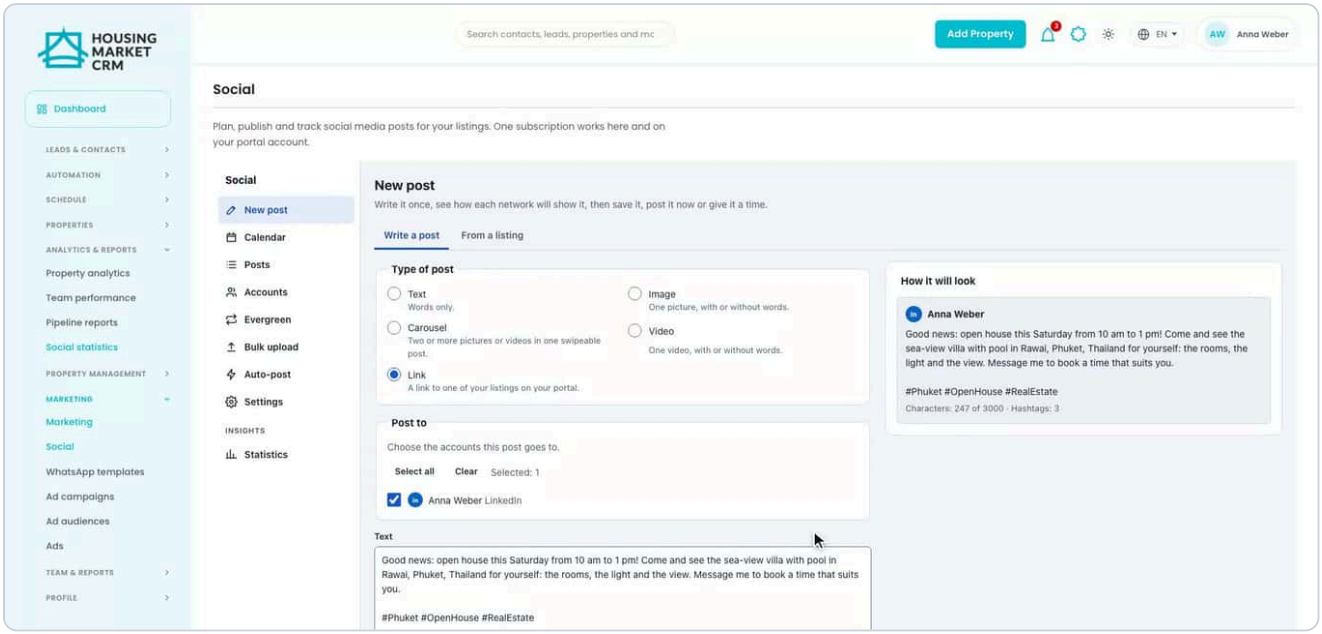


Figure 81.13 · Screen recorded 28 October 2026

14 Under **When**, choose **Pick a date and time**.

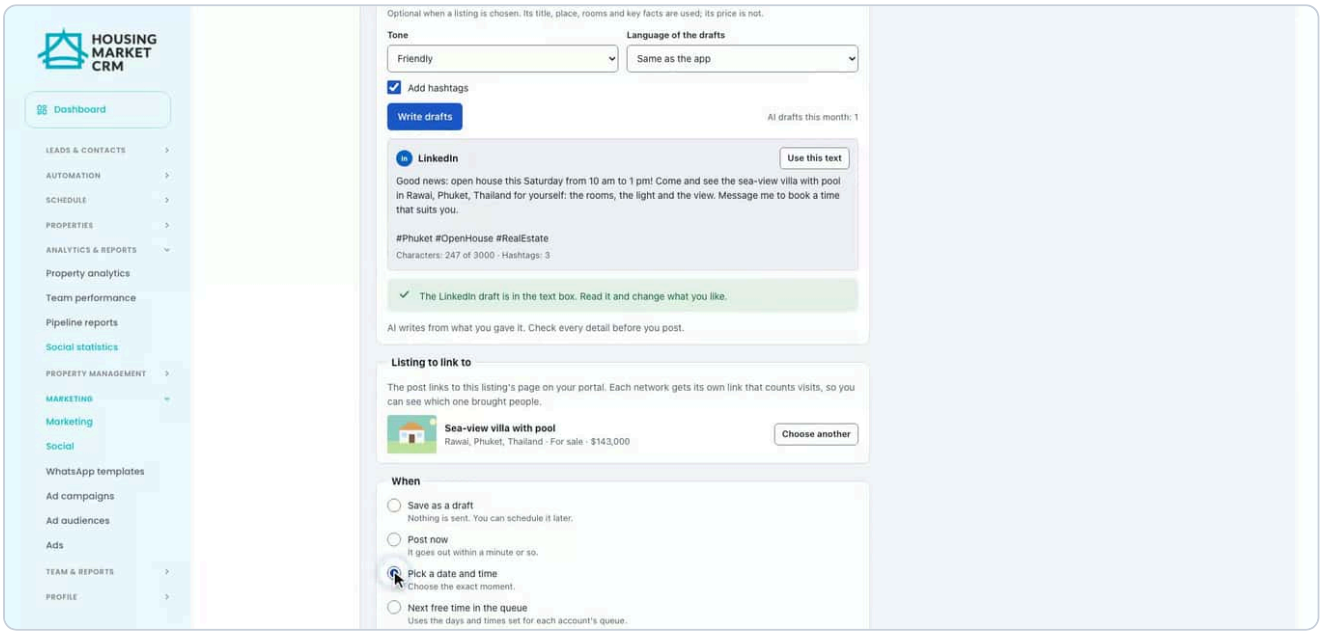


Figure 81.14 · Screen recorded 28 October 2026

15 Here: in two days, at 9 AM.

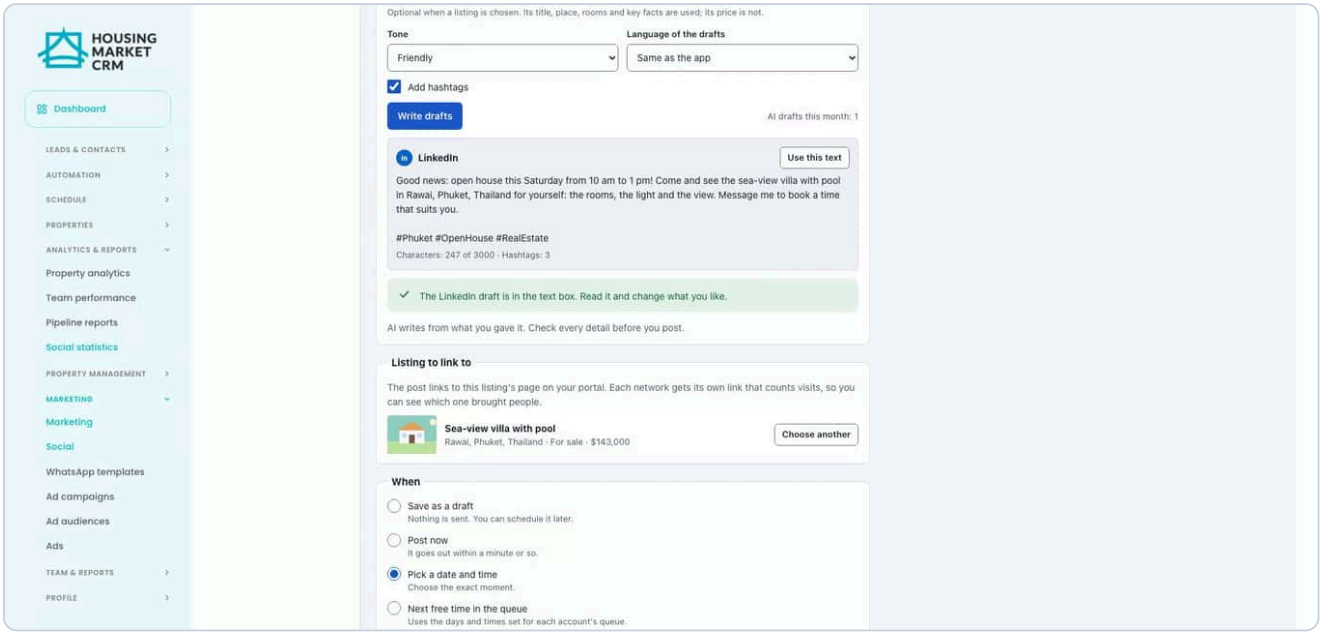


Figure 81.15 · Screen recorded 28 October 2026

16 Click **Schedule post**.

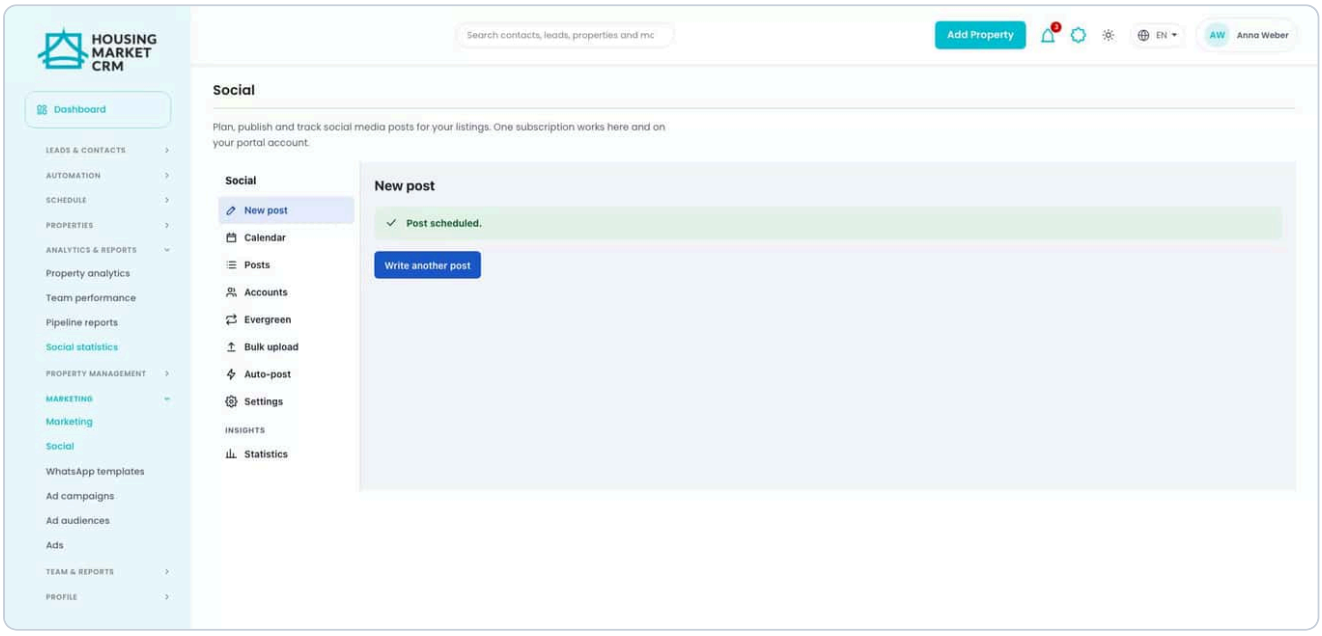


Figure 81.16 · Screen recorded 28 October 2026

17 The post is **scheduled** and appears on your calendar.

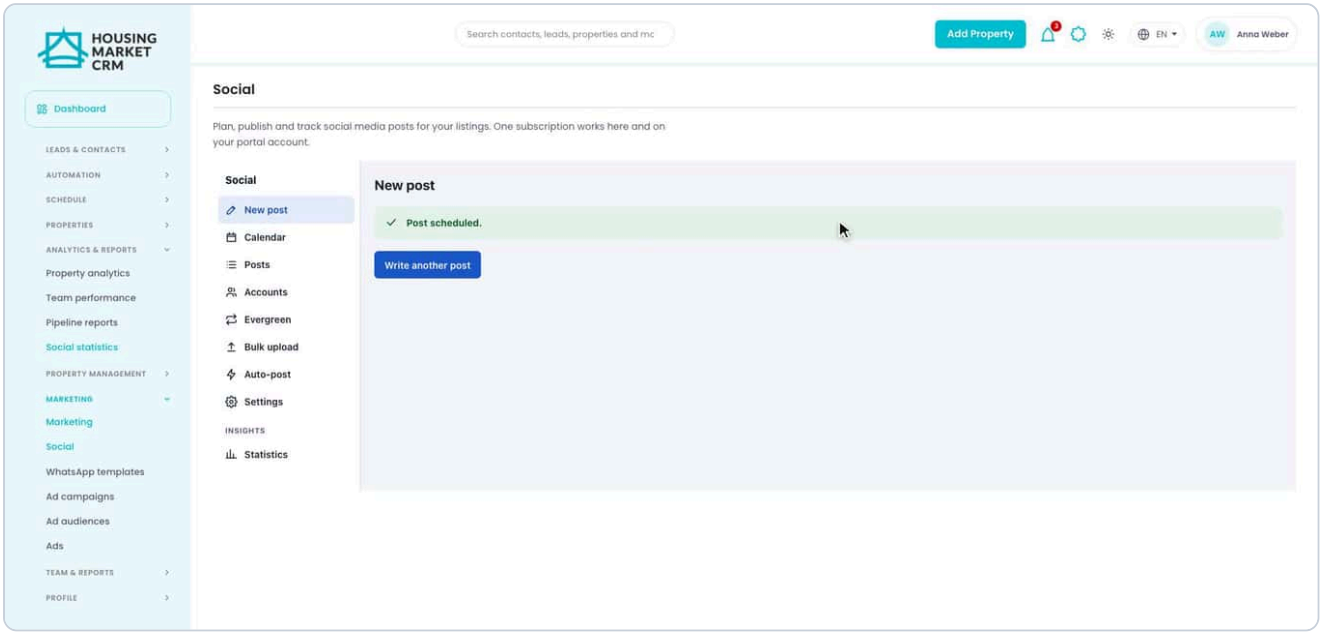


Figure 81.17 · Screen recorded 28 October 2026

GOOD TO KNOW

UPDATING How many AI drafts you can make each month is not published yet; the screen shows how many you have used. Write it for me appears only where your Social screen offers it.

82 CHAPTER 82

Manage posts and queues

Housing Market Social add-on | For agents | Watch the video

OVERVIEW

Under Posts, every post shows its state and buttons to schedule, edit, pause, resume, duplicate or delete it. The Queues tab holds the days and times an account posts at.

Open Posts. All posts lists every post with its state: Draft, Scheduled, Publishing, Published, Partly published, Failed, Paused or Cancelled. Use Show to see only one state. Choose Open to see each account the post goes to and how it is doing there.

- Schedule: gives a draft a time, as in the composer. Scheduling needs an active subscription.
- Edit: changes the text and the time of a draft, a scheduled post or a paused post. Pictures and videos cannot be changed there; duplicate the post or write a new one to use others. Take back to a draft makes a scheduled post a draft again, and nothing goes out until you schedule it again.
- Pause and Resume: a paused post is held and does not go out until you resume it.
- Duplicate: makes a copy that you can change and schedule.
- Delete: posts waiting to go out are cancelled. What already went out stays on the networks.

If a post did not go out, Open shows the reason and, where it is safe, Try again. When Social cannot tell whether a post went out, it asks you to look on the network first, because trying again could post it twice.

Queues

A queue is a set of days and times for one account. Choose Queues, then New queue, choose the account, give the queue a name and a time zone, and add the times and the days of the week. When you schedule a post you can choose the next free time in the queue, and the post takes the next slot. You can change a queue or pause it, and a paused queue gives no new slots.

From the Help Center: **How do I edit, pause, duplicate or delete a post, and how do queues work?**

STEP BY STEP

1 Posts lists every post you wrote, with its state.

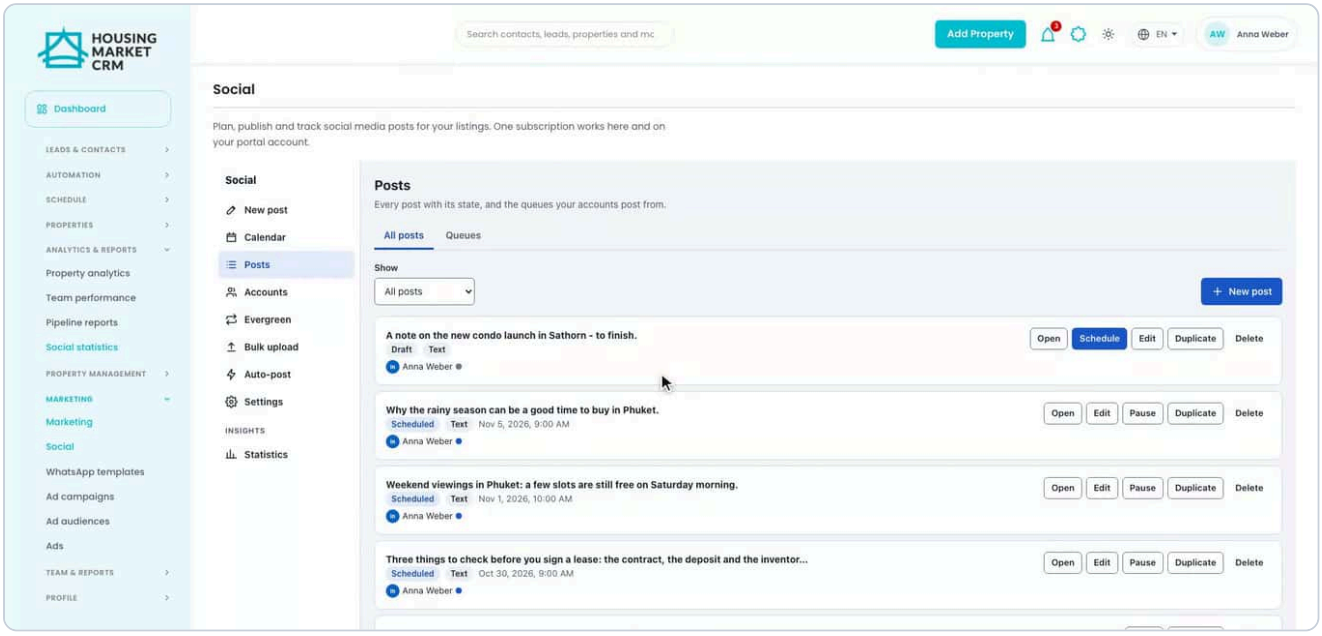


Figure 82.1 · Screen recorded 28 October 2026

2 Use Show to see only the scheduled posts.

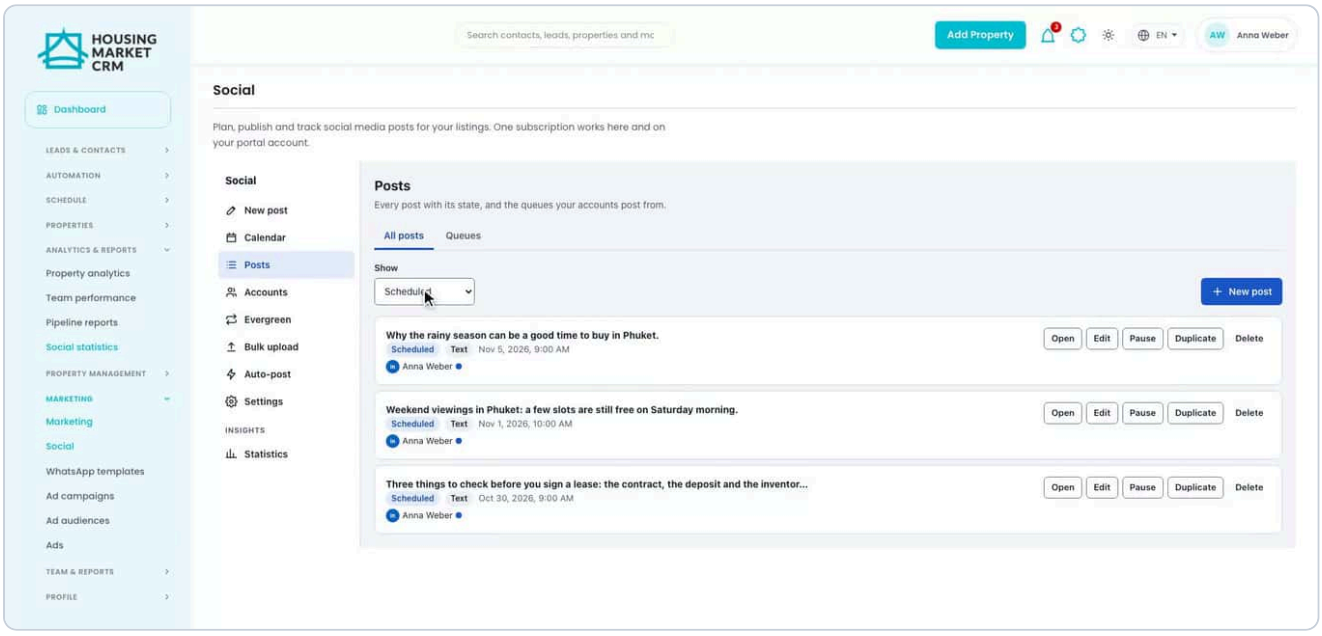


Figure 82.2 · Screen recorded 28 October 2026

3 Each post shows its text, **time** and **account**.

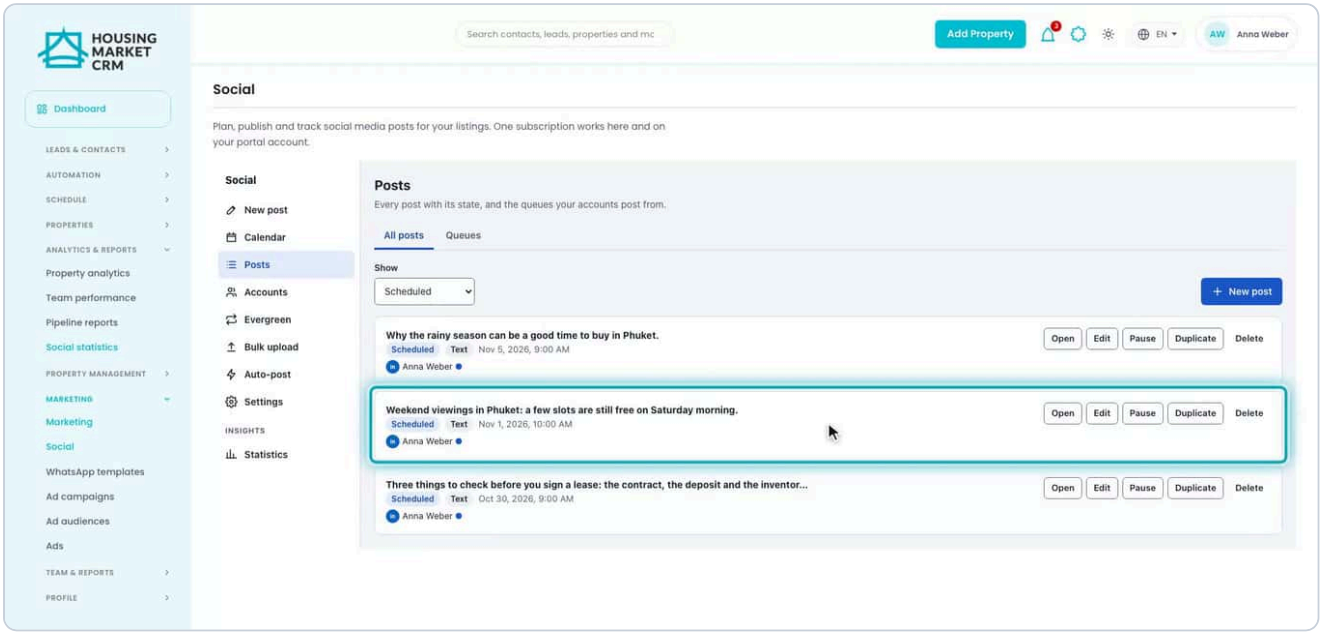


Figure 82.3 · Screen recorded 28 October 2026

4 Click **Edit** to change it.

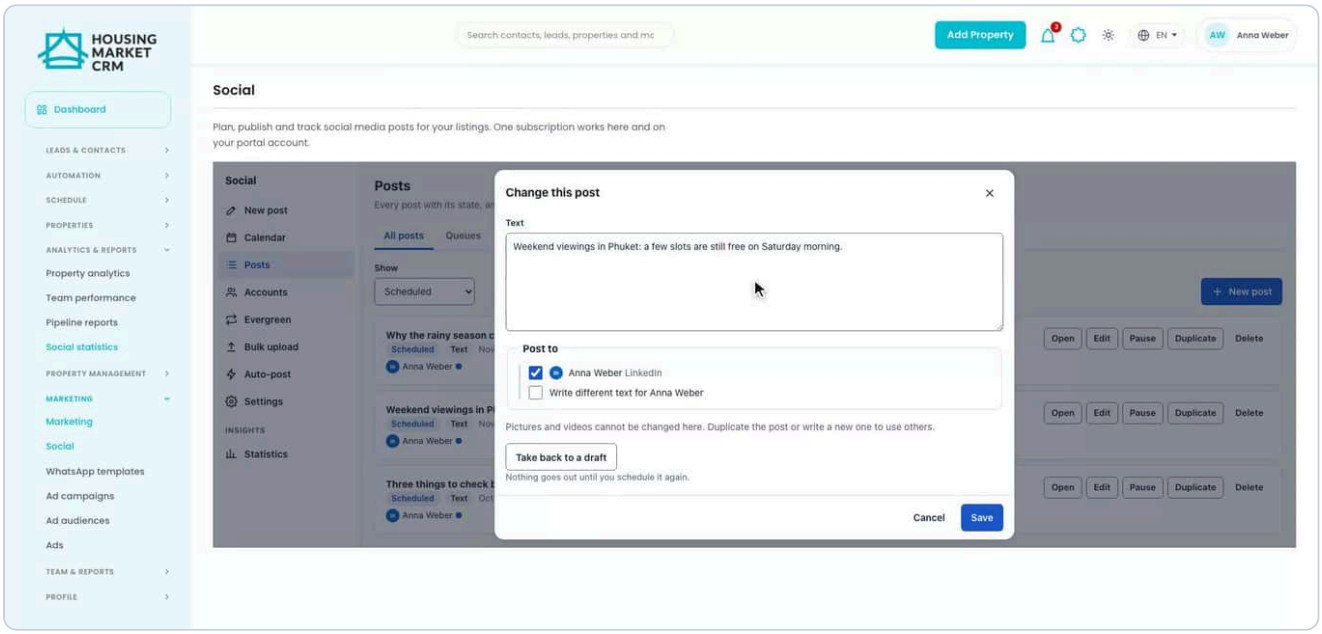


Figure 82.4 · Screen recorded 28 October 2026

5 Change the text.

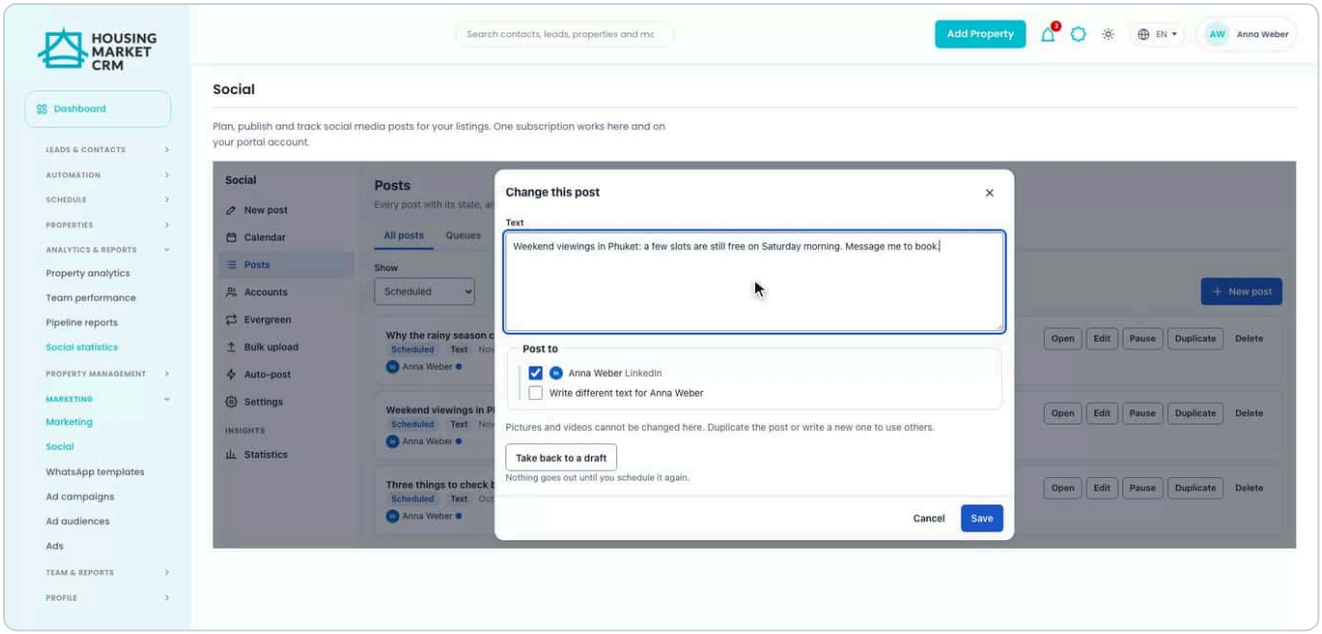


Figure 82.5 · Screen recorded 28 October 2026

6 **Take back to a draft** stops it until you schedule it again.

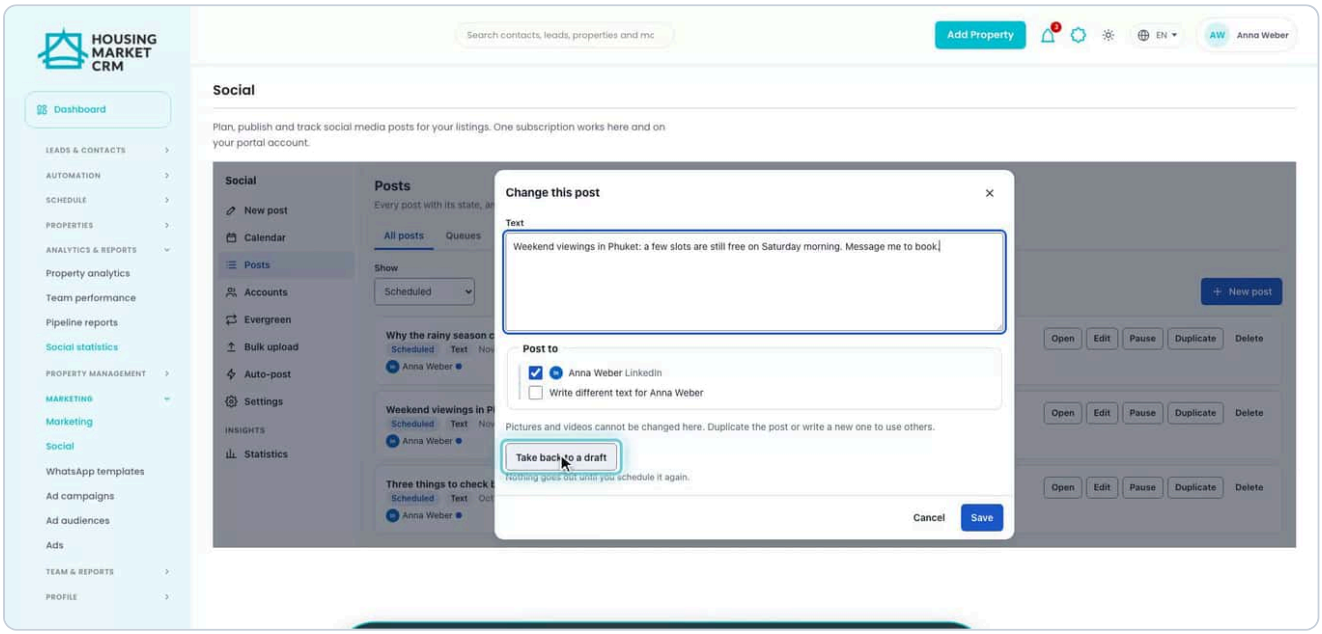


Figure 82.6 · Screen recorded 28 October 2026

7 and save. The time stays the same.

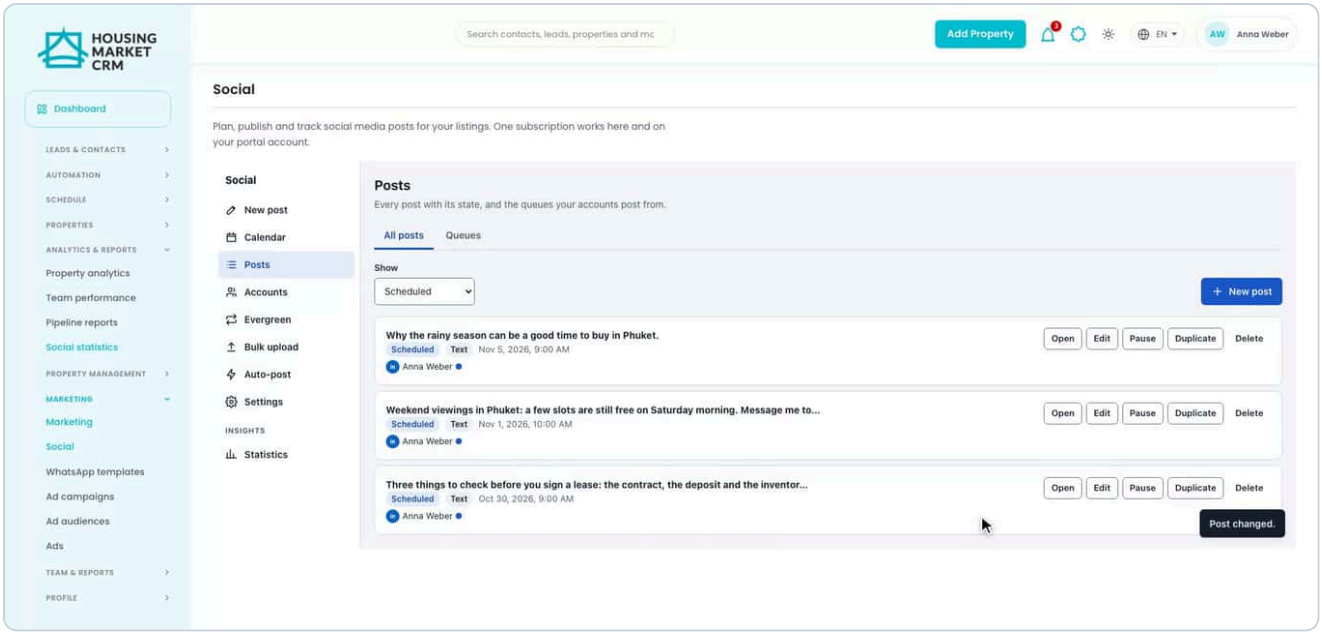


Figure 82.7 · Screen recorded 28 October 2026

8 **Pause** holds a post. **Duplicate** copies it.

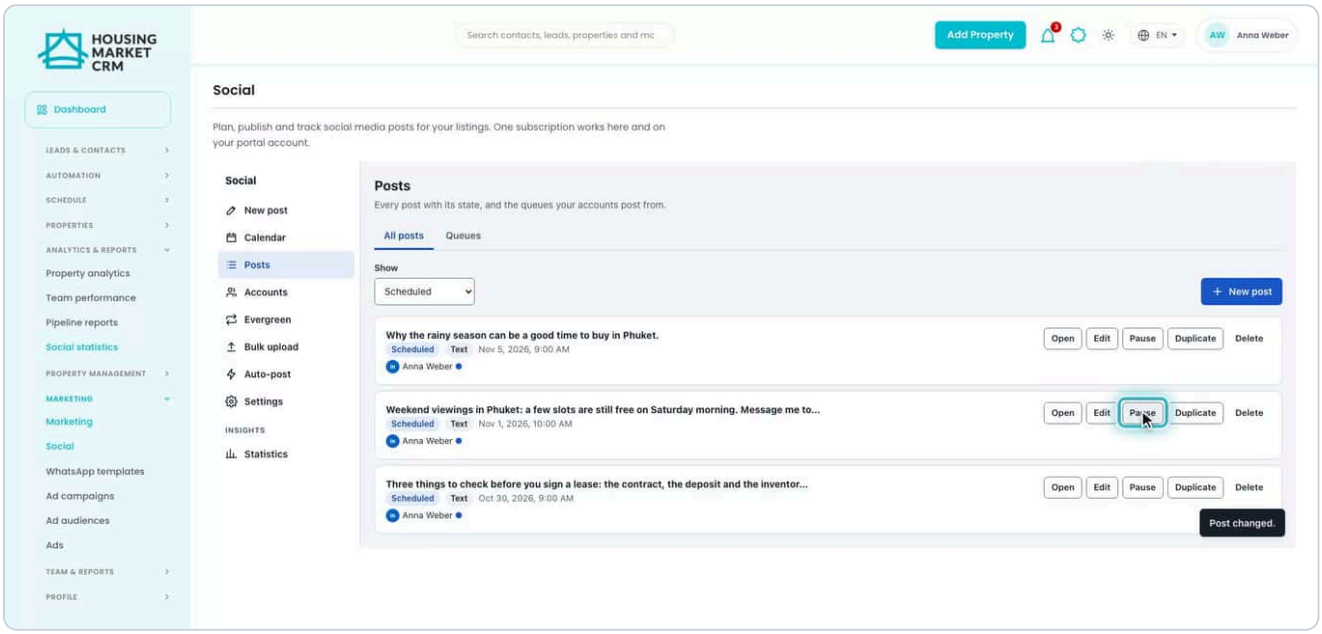


Figure 82.8 · Screen recorded 28 October 2026

9 **Delete** cancels it. What already went out stays on LinkedIn.

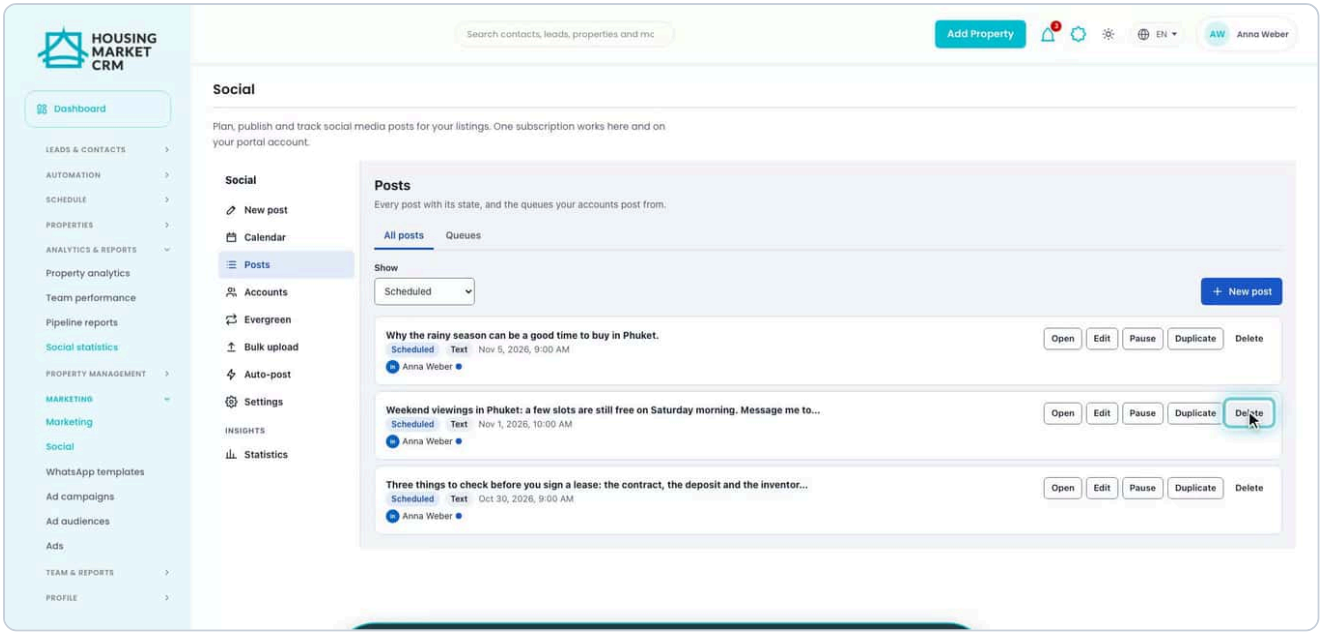


Figure 82.9 · Screen recorded 28 October 2026

10 Now open **Queues**.

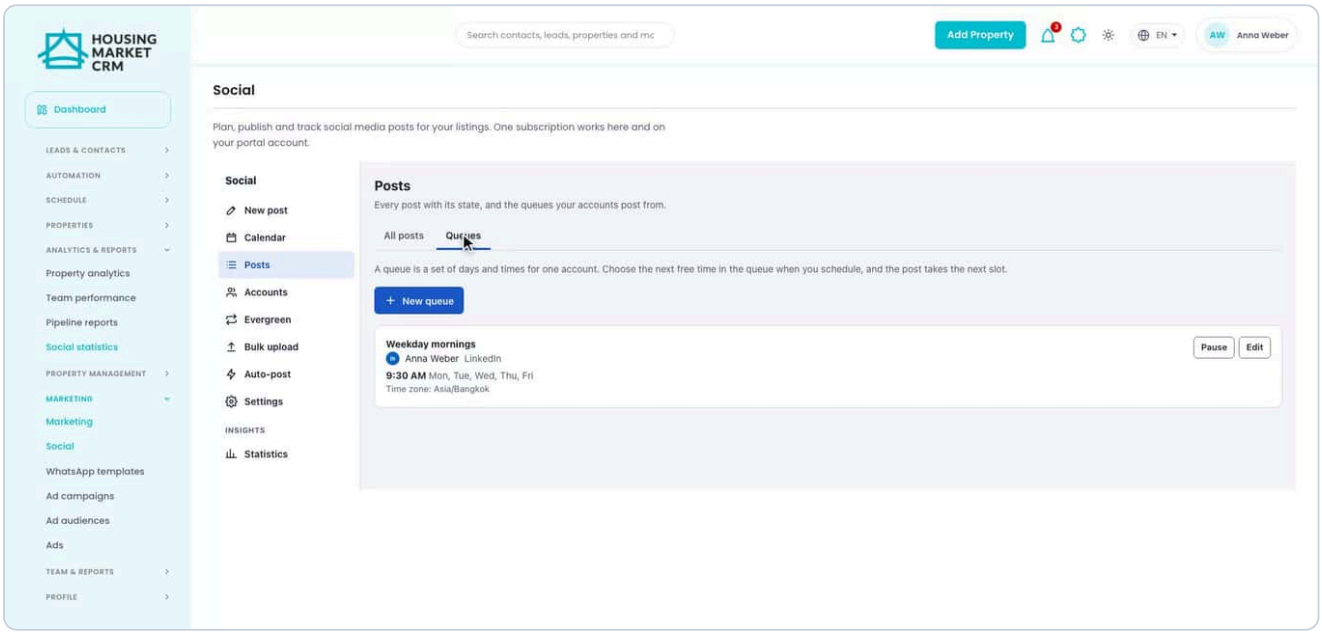


Figure 82.10 · Screen recorded 28 October 2026

11 A **queue** is a set of days and times for one account: here, weekdays at 9:30.

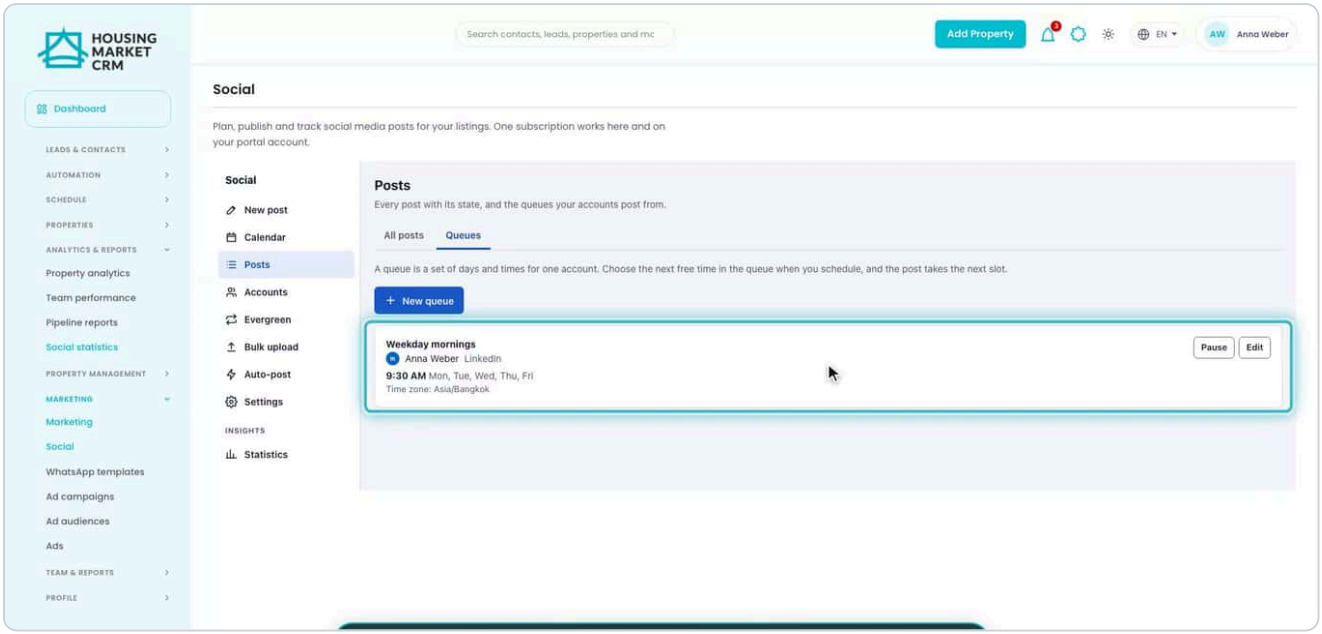


Figure 82.11 · Screen recorded 28 October 2026

12 Click **New queue** to make one: the account, a name, the time zone, the days and the times.

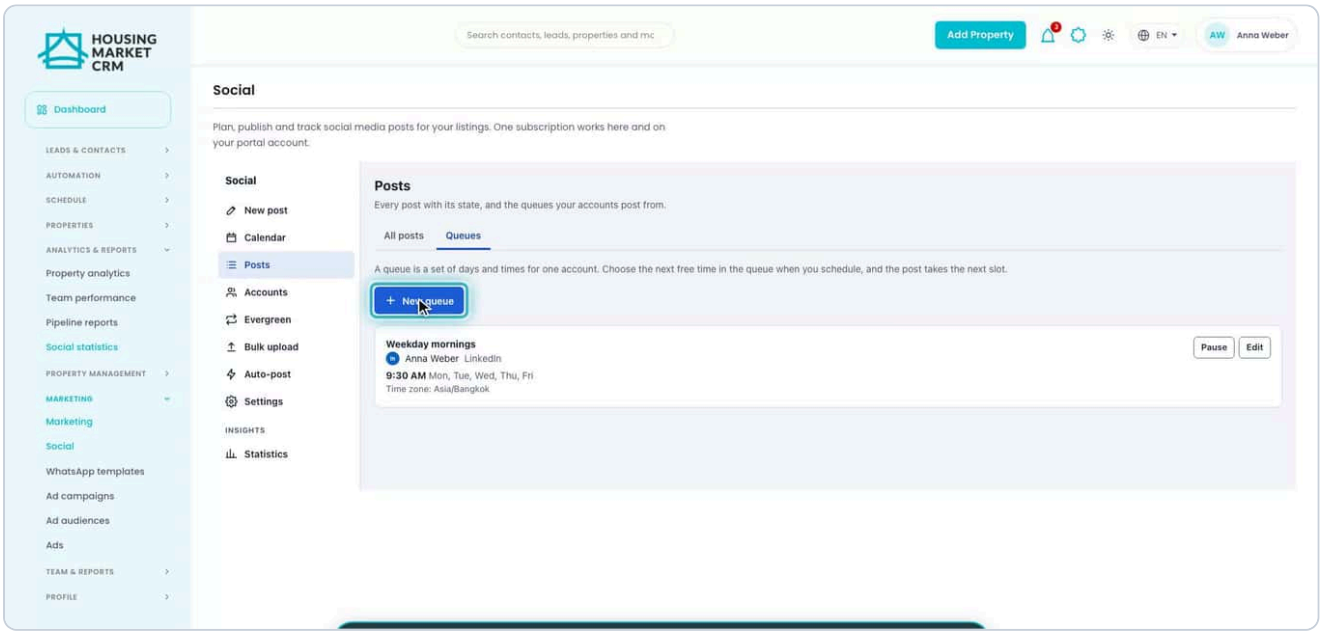


Figure 82.12 · Screen recorded 28 October 2026

13 When you schedule a post, choose **Next free time in the queue**. It takes the next open slot.

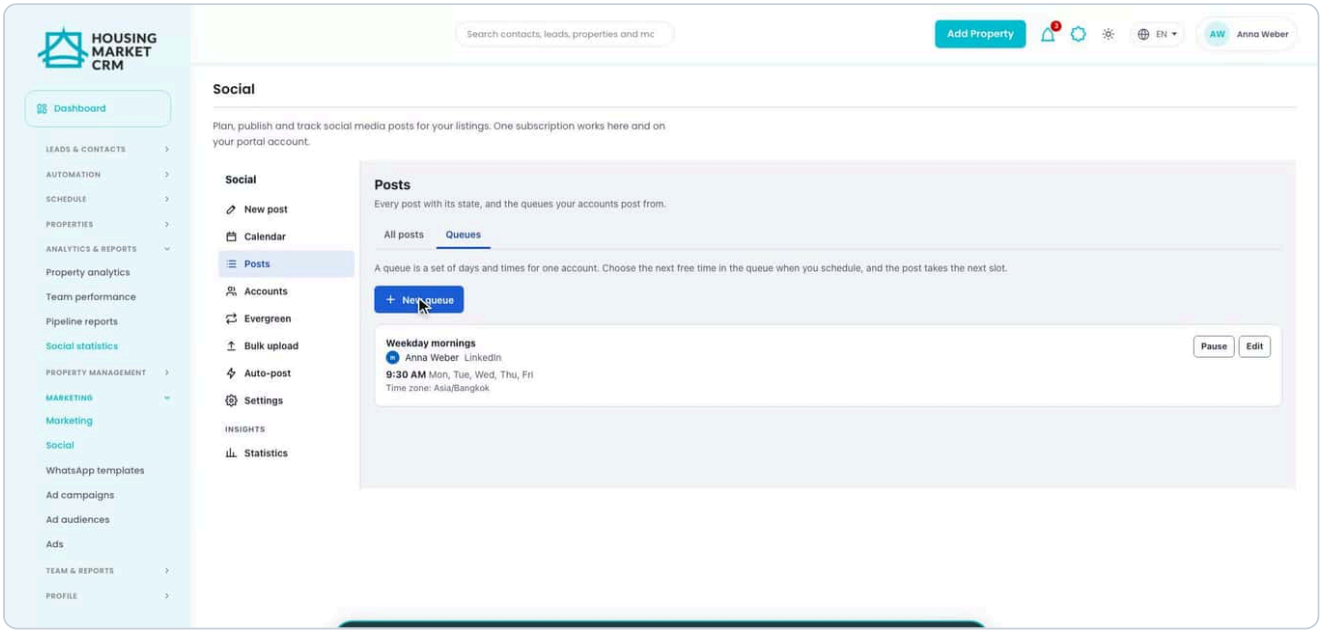


Figure 82.13 · Screen recorded 28 October 2026

RELATED HELP CENTER ARTICLES

How do I schedule posts in Housing Market Social?	faq.housingmarketgroup.com/faq/how-do-i-schedule-posts-in-housing-market-social

83 CHAPTER 83

Make evergreen post lists

Housing Market Social add-on | For agents | Watch the video

OVERVIEW

Evergreen lists repeat posts about you, tips or testimonials on a schedule. Bulk upload schedules many posts at once from a CSV file.

Evergreen lists

A list is a set of posts and a schedule: every day, on certain days of the week, or once a month. At each time the post that has rested longest goes out. You also set how many days must pass before a post repeats. Switch a list, or a single post in it, off at any time. A list with no posts skips its turn.

Bulk upload

Download the template and fill in one row for each post: the text, the date and time, the time zone and the accounts, with pictures or a listing if you want them. Save it as CSV and check it. Social checks every row and shows what is ready, what has problems and why, and what was already scheduled from the same file. It writes nothing until you say so, and uploading the same file again makes nothing twice.

From the Help Center: **What are evergreen lists and bulk upload in Housing Market Social?**

STEP BY STEP

1 Evergreen lists hold posts that repeat on a schedule: about you, tips, testimonials.

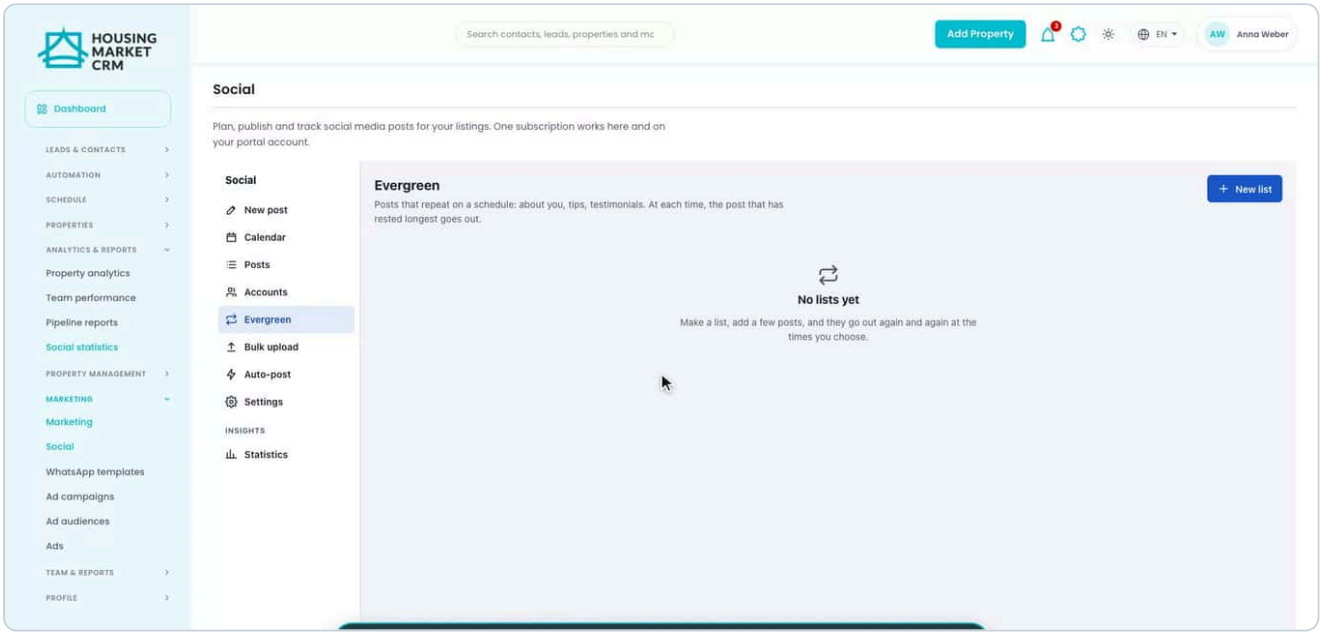


Figure 83.1 · Screen recorded 28 October 2026

2 Click New list.

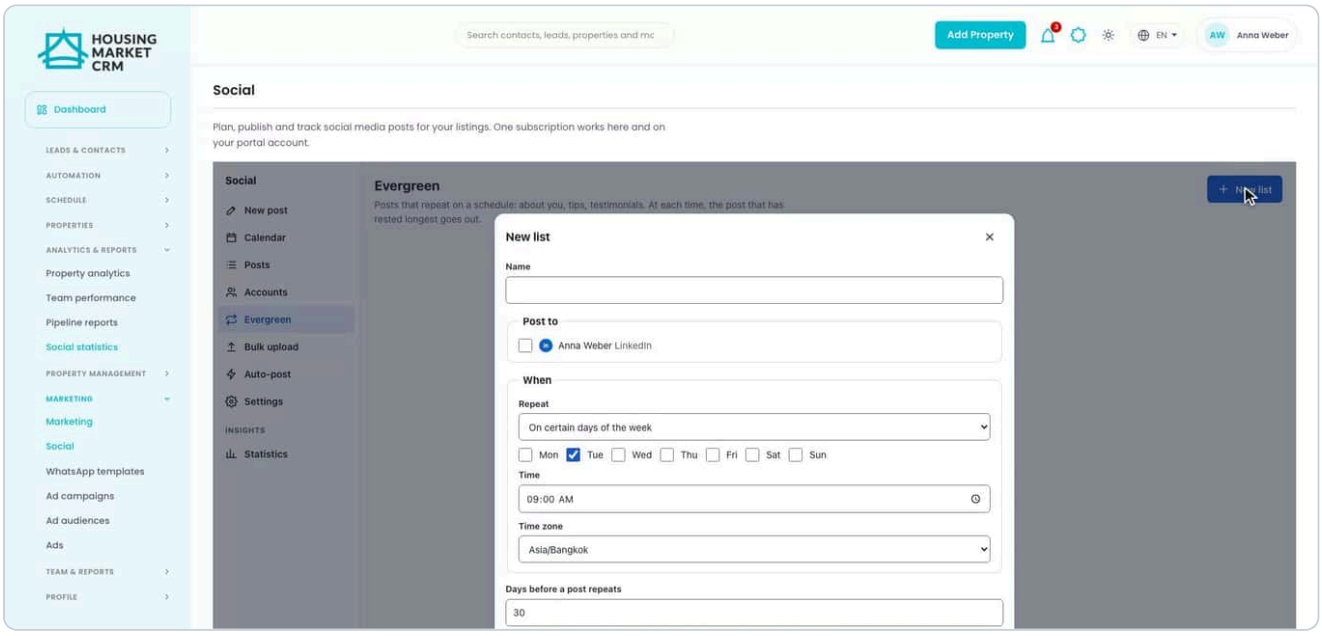


Figure 83.2 · Screen recorded 28 October 2026

3 Give it a **name**.

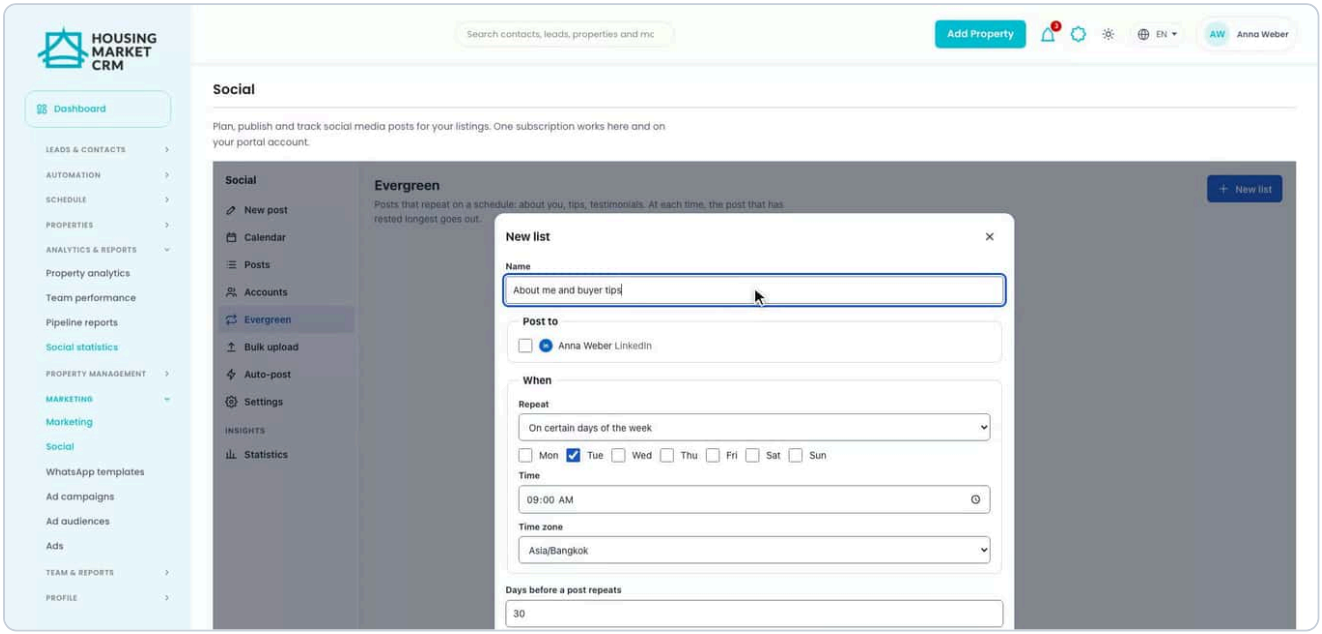


Figure 83.3 · Screen recorded 28 October 2026

4 Tick your **LinkedIn** account.

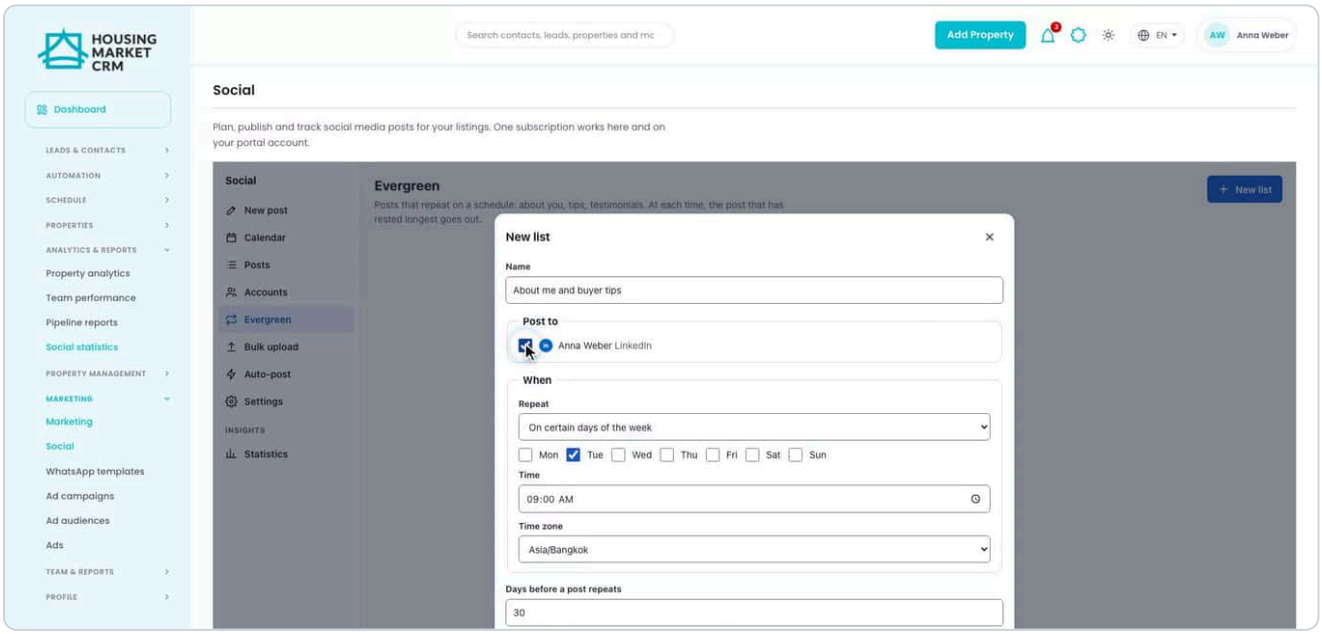


Figure 83.4 · Screen recorded 28 October 2026

5 Under **Repeat**, choose **certain days of the week** tick **Tuesday**.

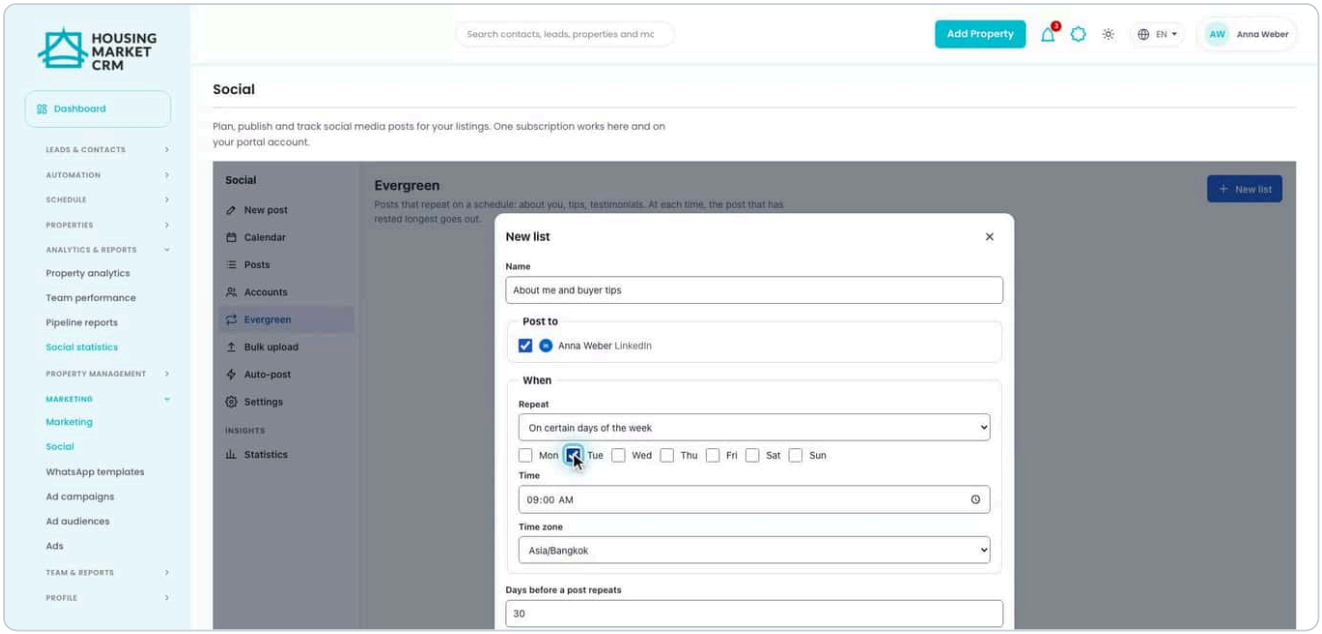


Figure 83.5 · Screen recorded 28 October 2026

6 and **Thursday**.

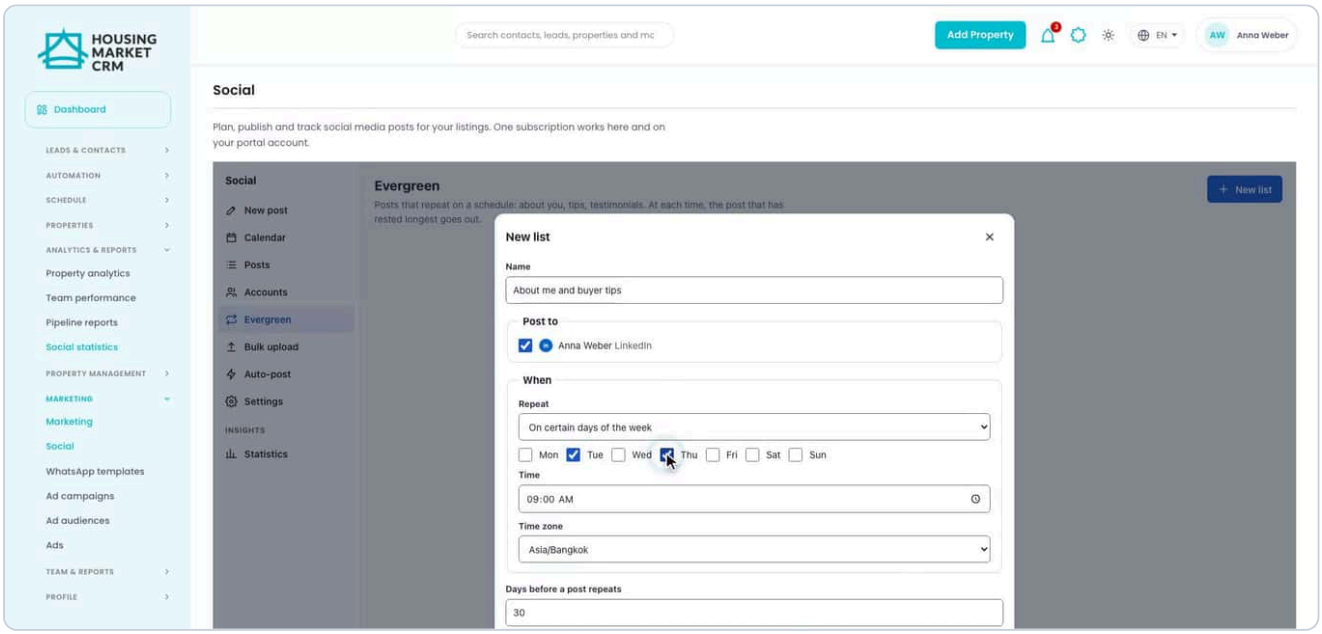


Figure 83.6 · Screen recorded 28 October 2026

7 Set the **time**, here 10 AM, and the time zone.

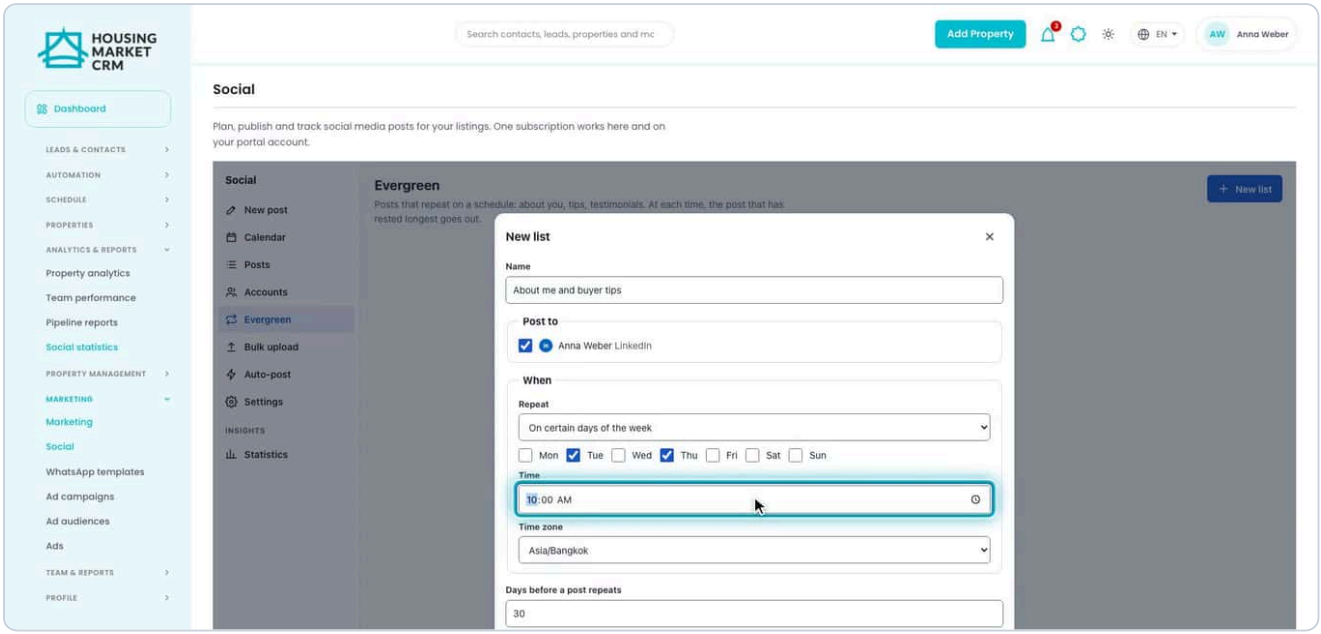


Figure 83.7 · Screen recorded 28 October 2026

8 **Days before a post repeats** keeps the same post from going out too soon.

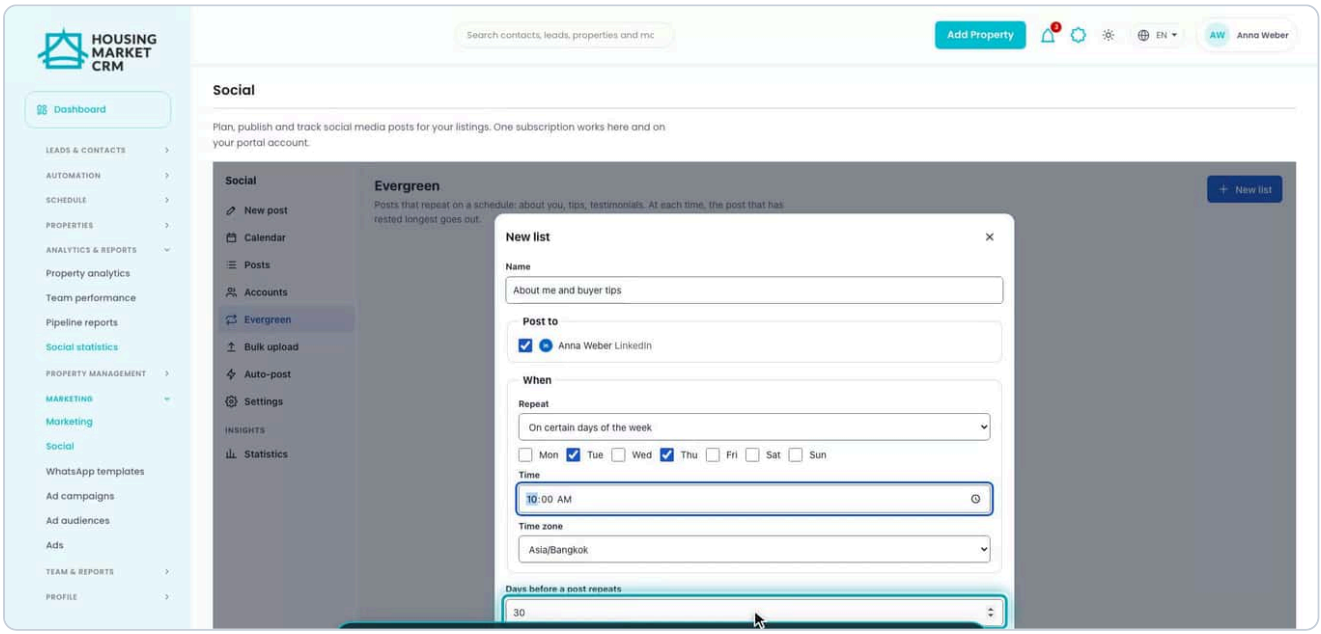


Figure 83.8 · Screen recorded 28 October 2026

9 Click **Save**.

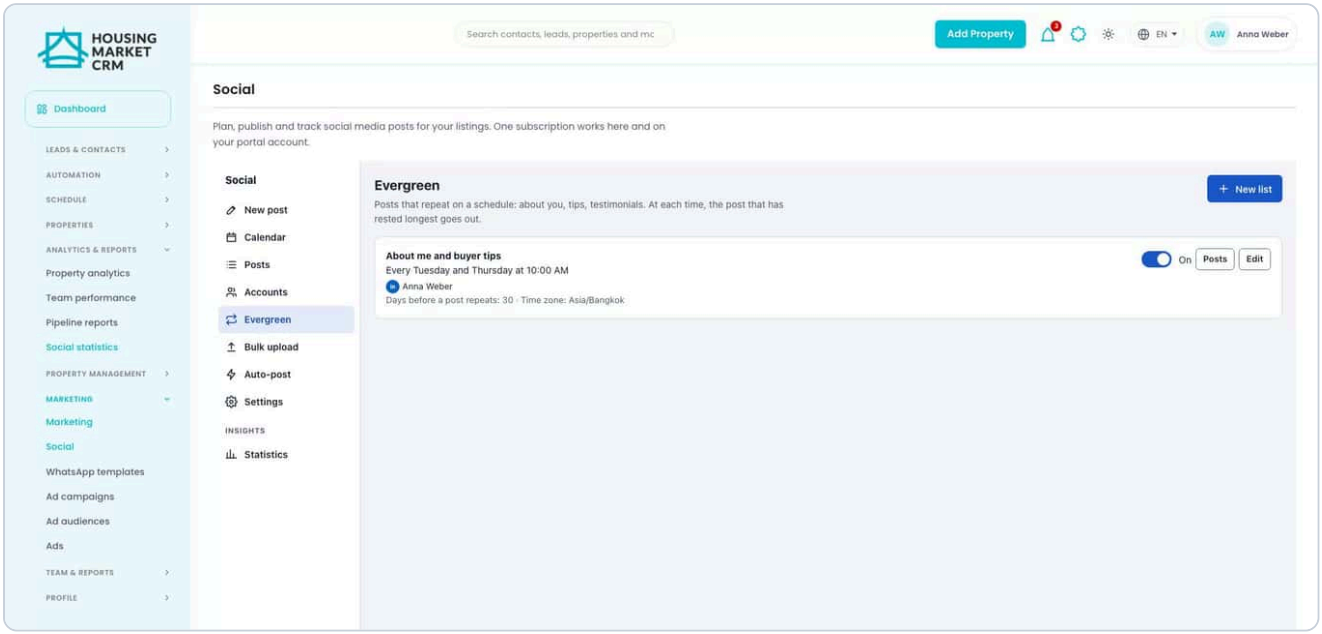


Figure 83.9 · Screen recorded 28 October 2026

10 The list shows **when** it posts.

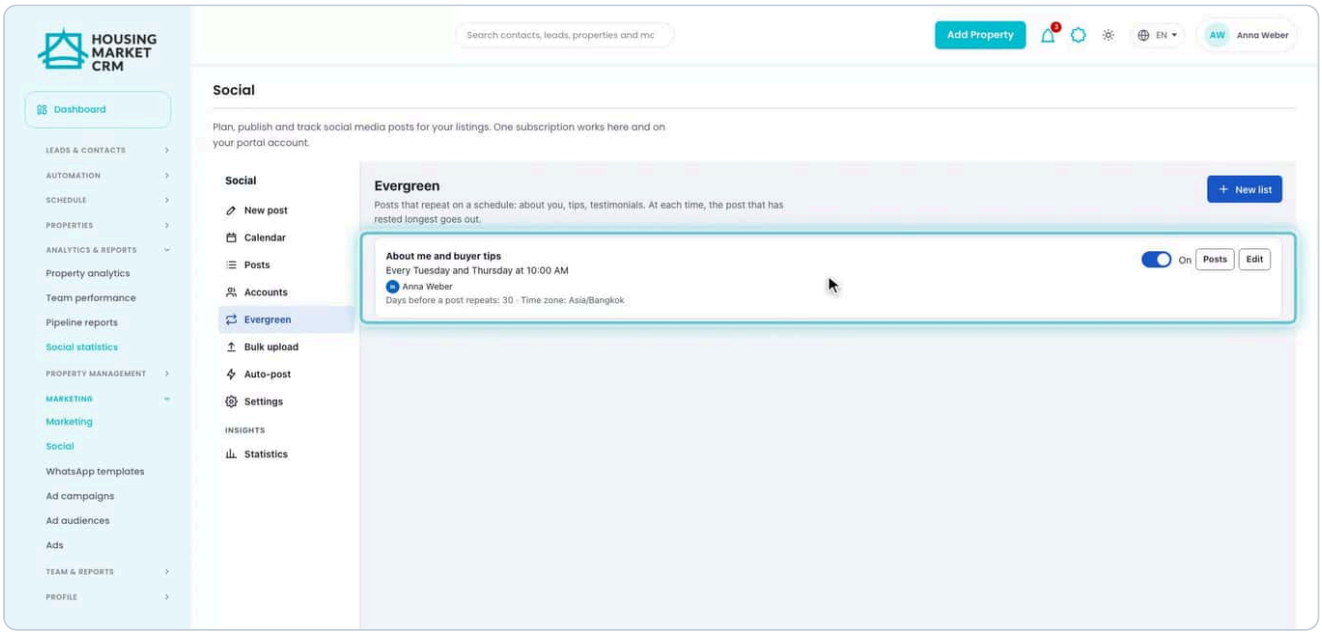


Figure 83.10 · Screen recorded 28 October 2026

11 This **On** switch pauses the **whole list**.

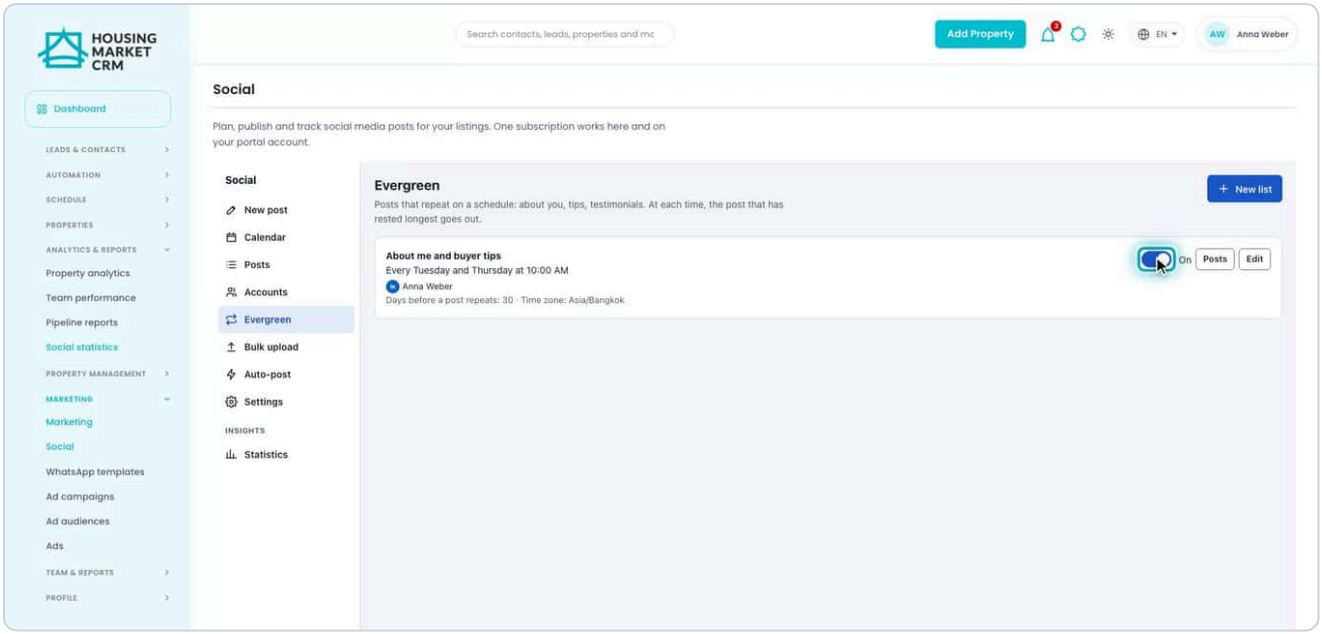


Figure 83.11 · Screen recorded 28 October 2026

12 Open its **Posts**.

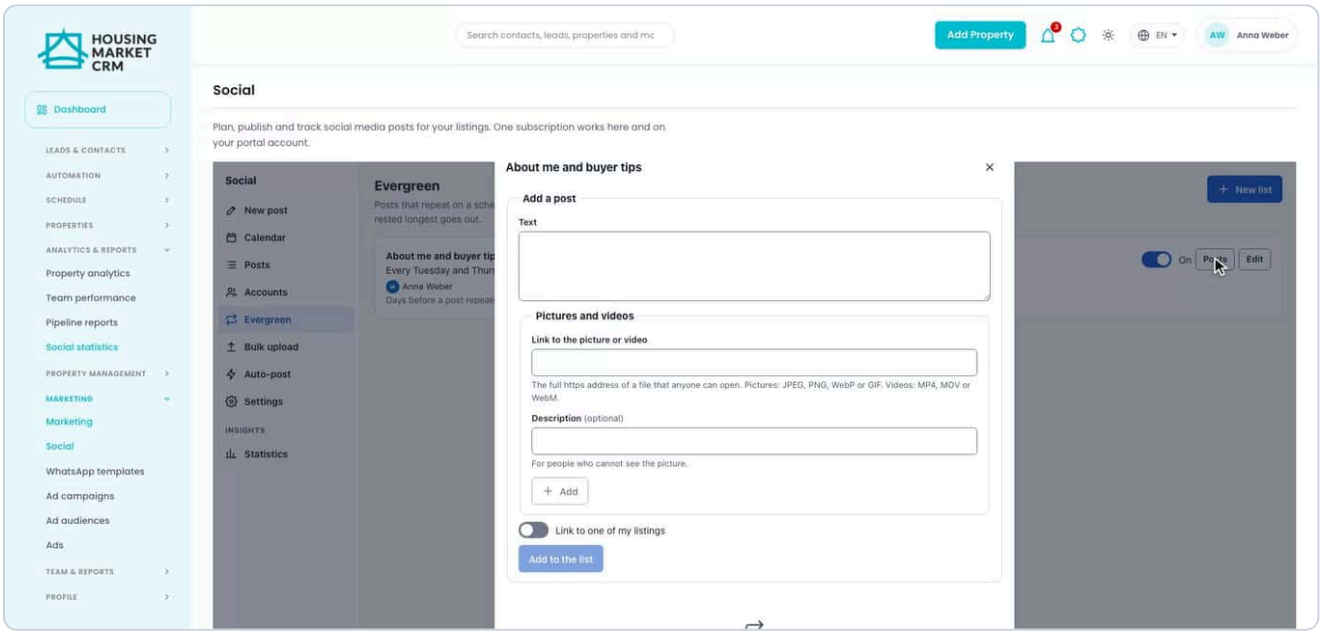


Figure 83.12 · Screen recorded 28 October 2026

13 Write a post and click **Add to the list**.

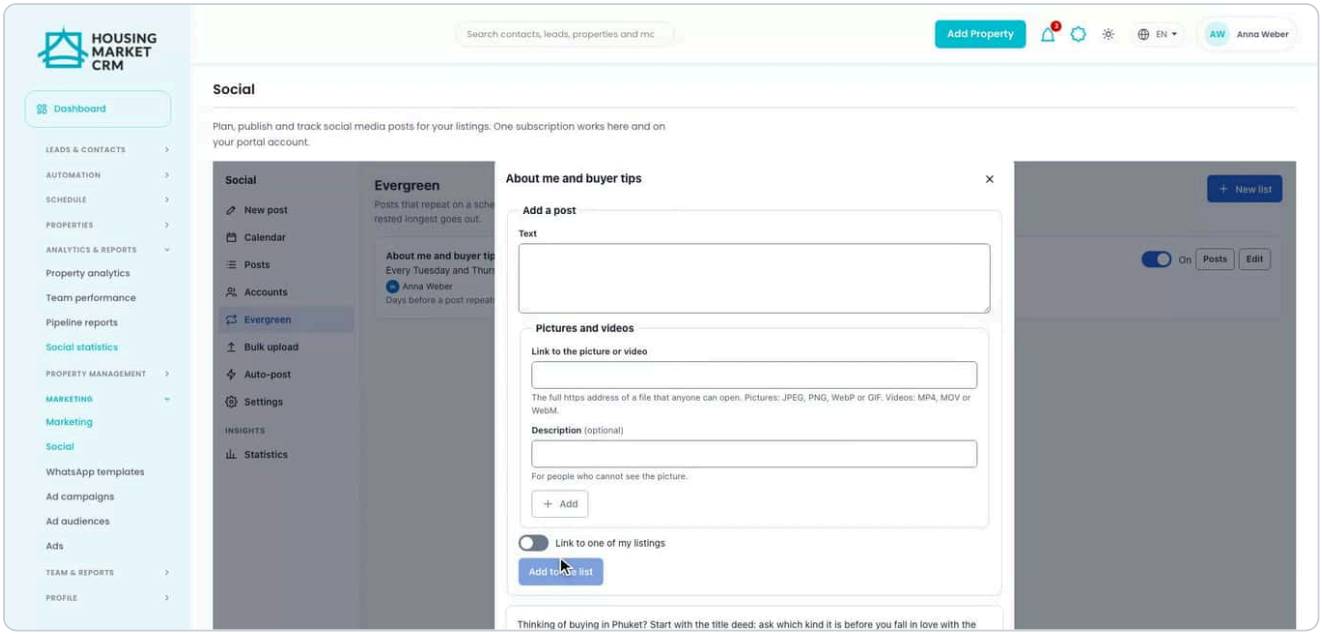


Figure 83.13 · Screen recorded 28 October 2026

14 Add a few more.

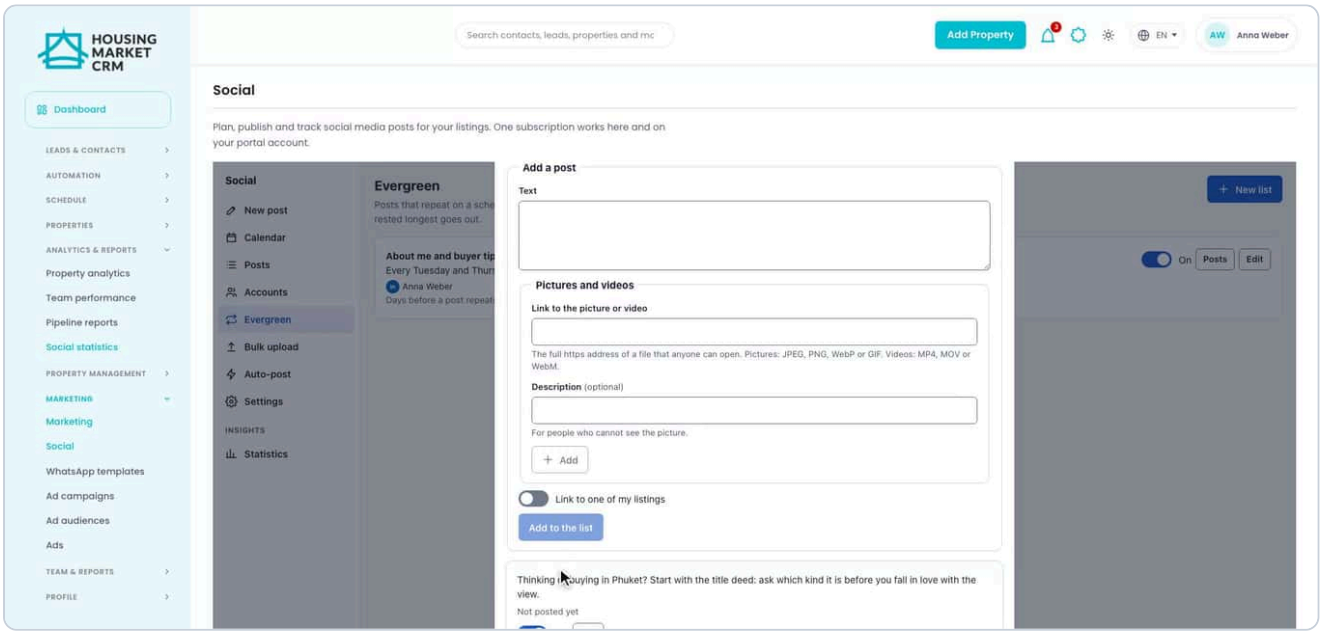


Figure 83.14 · Screen recorded 28 October 2026

15 At each time, the post that has **rested longest** goes out.

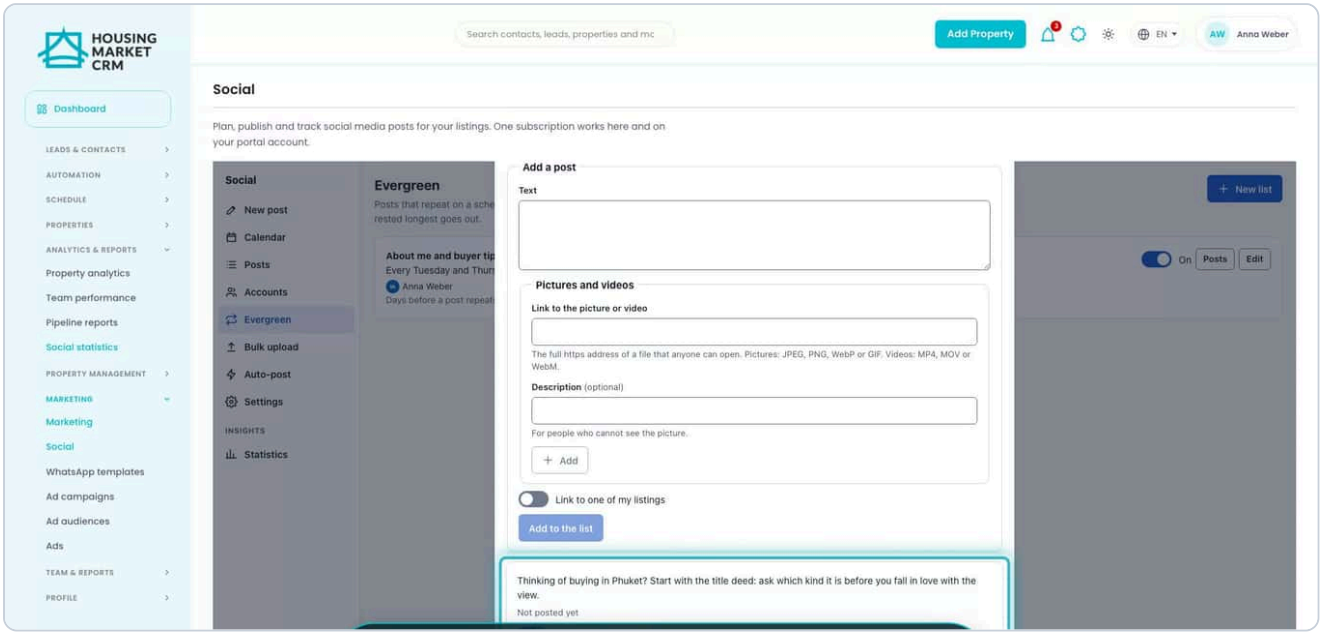


Figure 83.15 · Screen recorded 28 October 2026

16 Switch **one post** off here, without removing it.

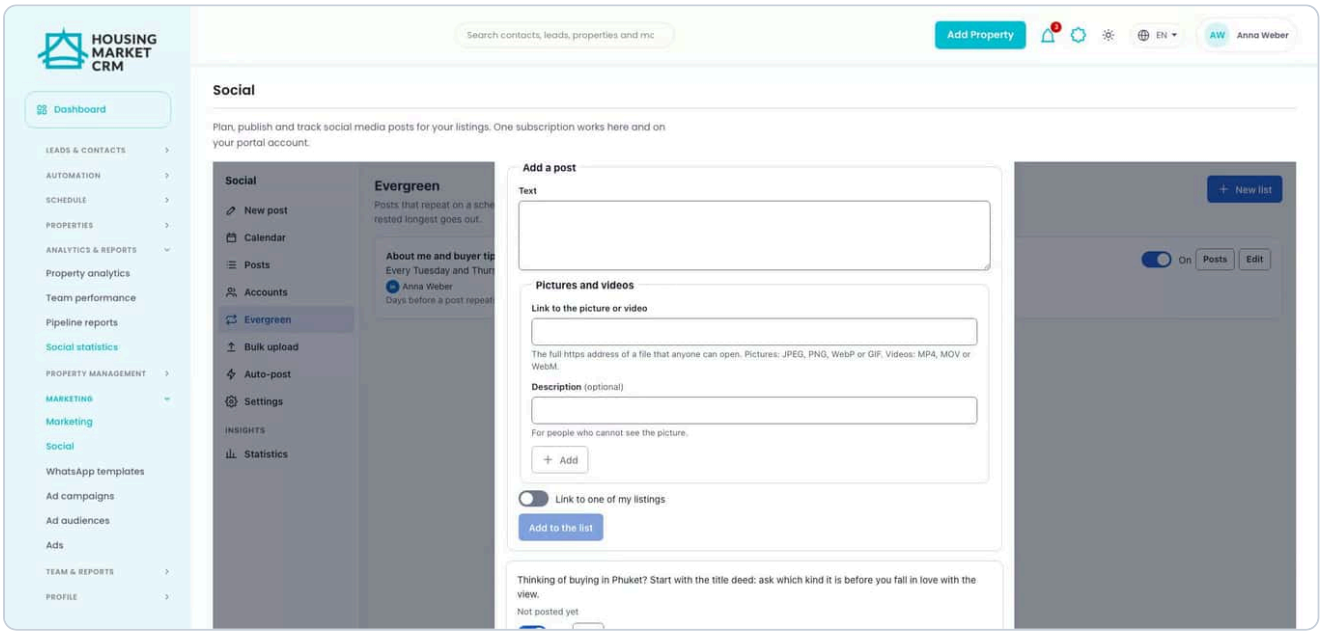


Figure 83.16 · Screen recorded 28 October 2026

84 CHAPTER 84

Bulk schedule posts from a CSV

Housing Market Social add-on | For agents | Watch the video

OVERVIEW

Under Bulk upload, download the template, fill in one row for each post, save it as CSV and check it. Social shows what is ready and what to fix, and writes nothing until you say so.

Open Bulk upload and choose Download the template. Fill in one row for each post. The columns are text, datetime (for example 2026-11-10 09:30, in your time zone), timezone, accounts (names, networks or ids separated by a vertical bar), media (links separated by a vertical bar), link_domain and link_path, listing_id and listing_domain, and tone. A file can have up to 500 rows.

Save the file as CSV, choose it (or paste its text) and choose Check the file. Social checks every row and shows how many are ready, how many have problems and why, and how many were already scheduled from the same file. A row can be refused, for example, because no account of yours has that name, the date and time cannot be read, or a network would refuse the post.

Nothing is made until you choose Schedule the posts. Rows with problems are left out, and you can fix them and upload the file again. Uploading the same file again makes nothing twice. Scheduling needs an active subscription.

Evergreen lists, which repeat posts on a schedule, are a different tool; see "What are evergreen lists and bulk upload in Housing Market Social?".

From the Help Center: **How do I schedule many posts at once with a CSV file?**

STEP BY STEP

1 Bulk upload schedules many posts at once from a spreadsheet.

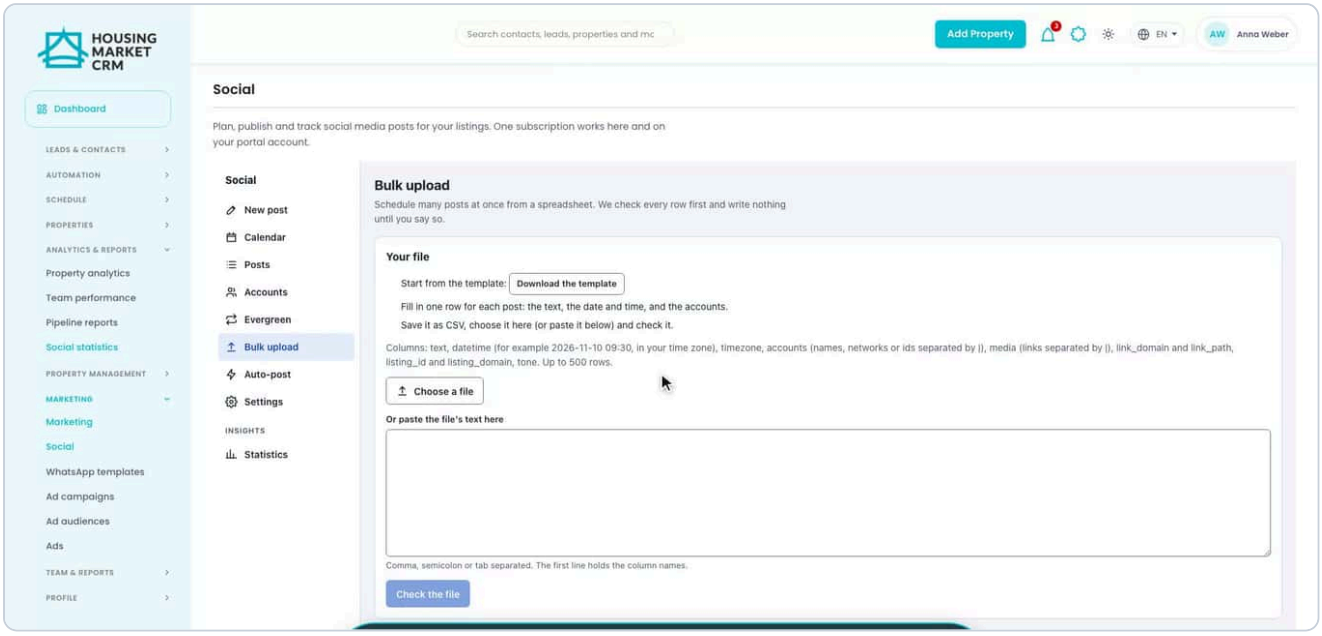


Figure 84.1 · Screen recorded 28 October 2026

2 Start with Download the template.

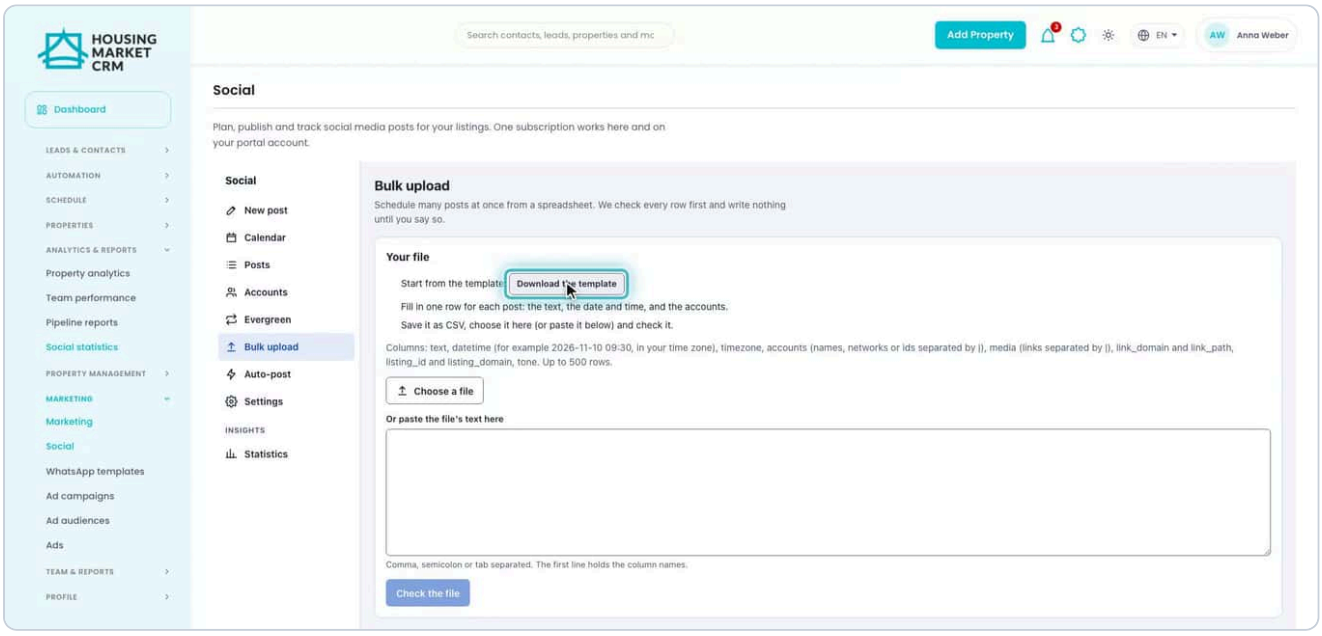


Figure 84.2 · Screen recorded 28 October 2026

3 One row per post: the **text**, the **date and time** and the **account**.

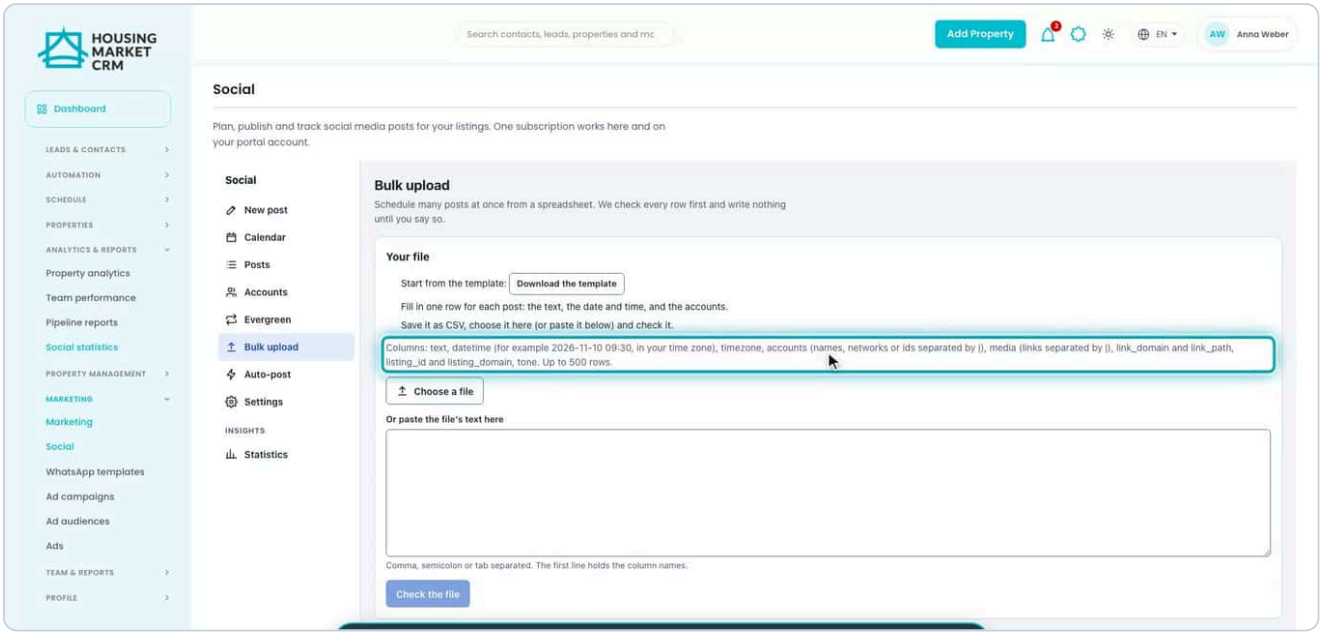


Figure 84.3 · Screen recorded 28 October 2026

4 Choose your CSV file here or paste it from your spreadsheet.

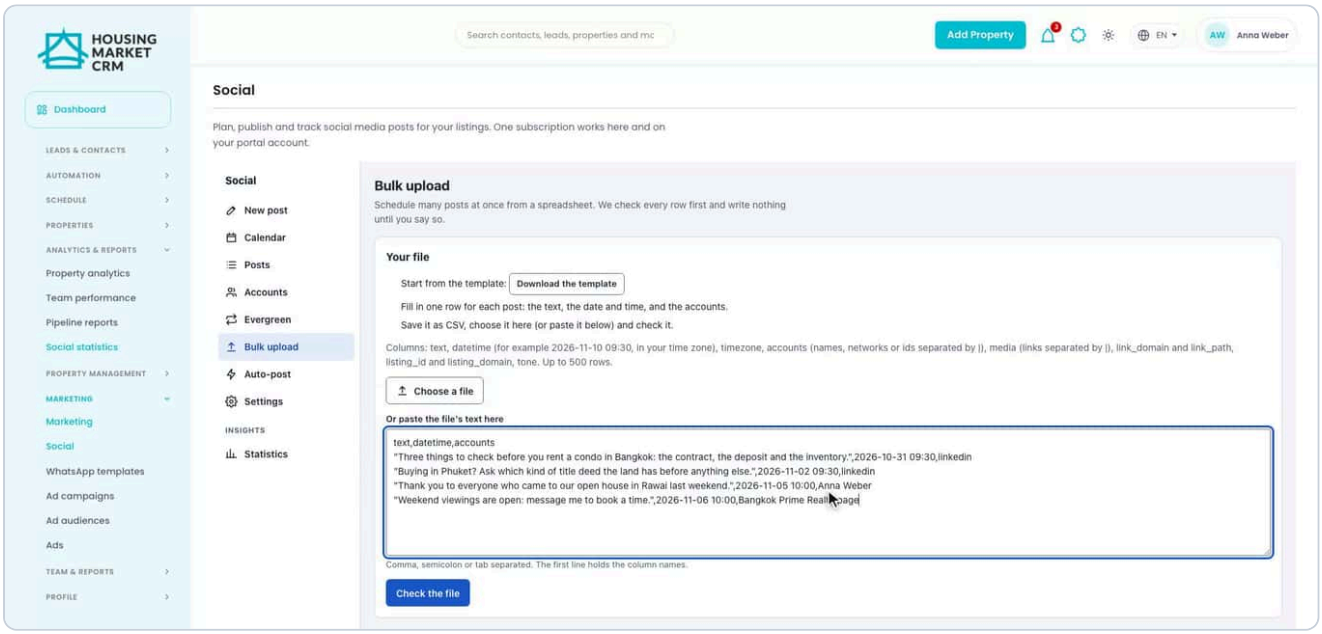


Figure 84.4 · Screen recorded 28 October 2026

5 Click **Check the file**. Nothing is written yet.

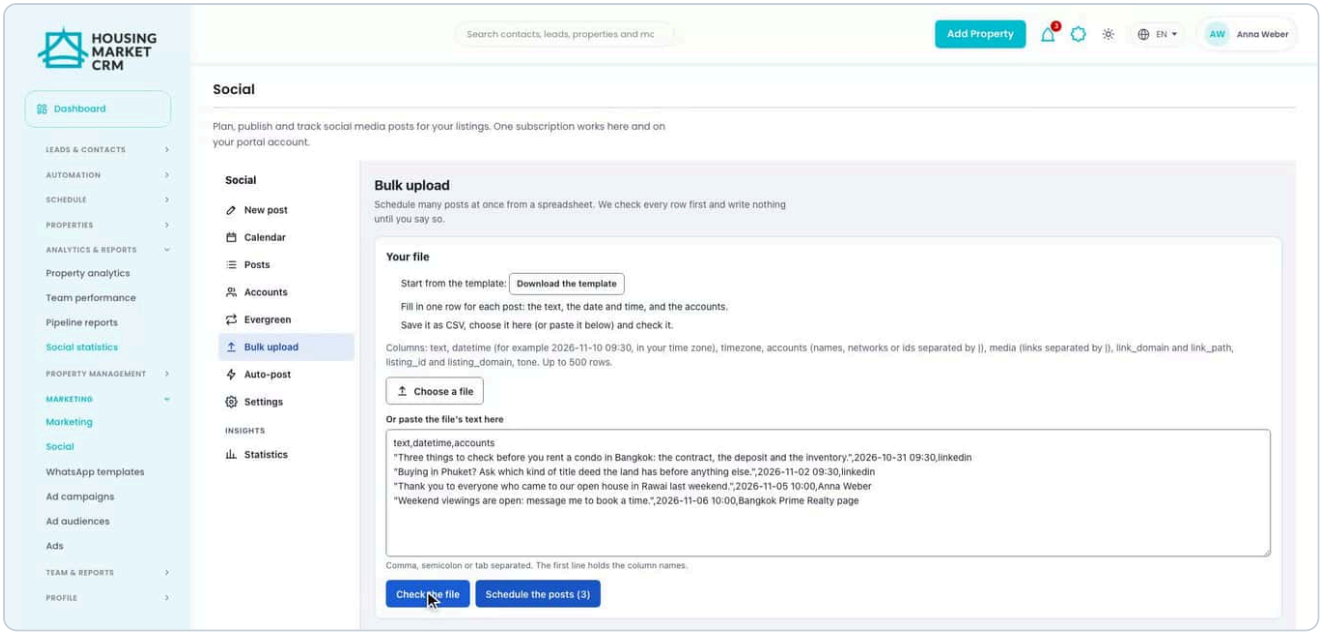


Figure 84.5 · Screen recorded 28 October 2026

6 You see how many rows are **ready** and how many have **problems**.

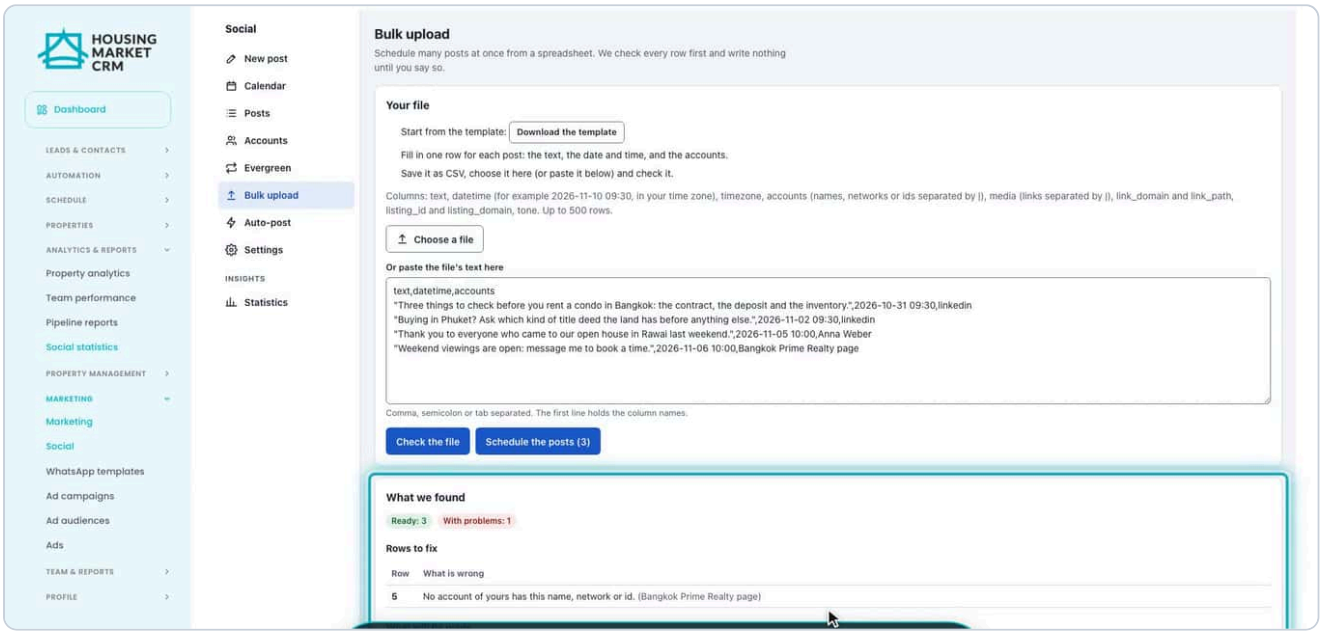


Figure 84.6 · Screen recorded 28 October 2026

7 This row names an account you have not connected. **Fix it** in your file.

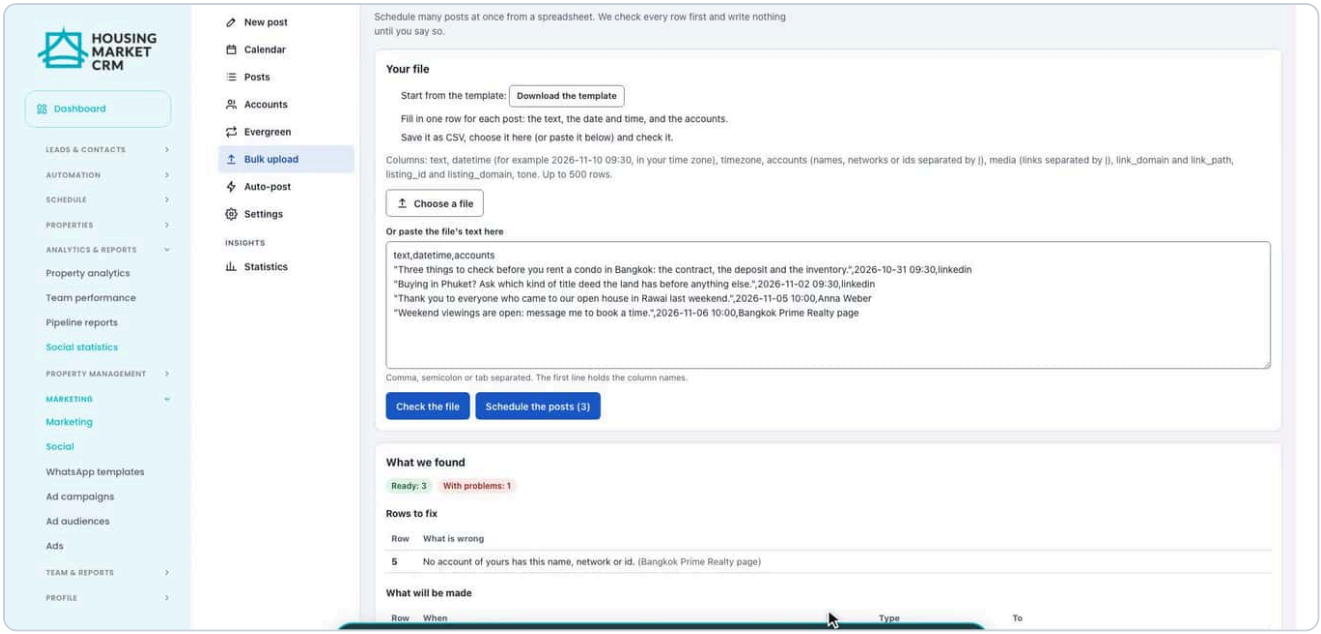


Figure 84.7 · Screen recorded 28 October 2026

8 **What will be made**: each post, its time and its account.

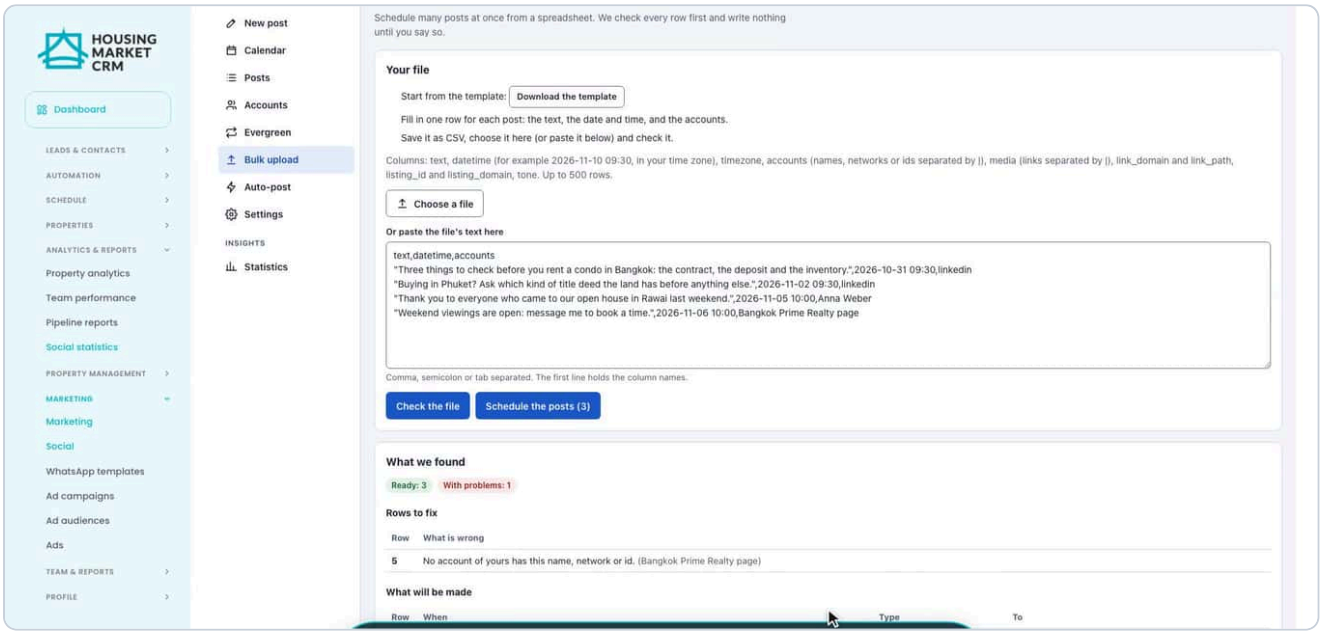


Figure 84.8 · Screen recorded 28 October 2026

9 Click **Schedule the posts.**

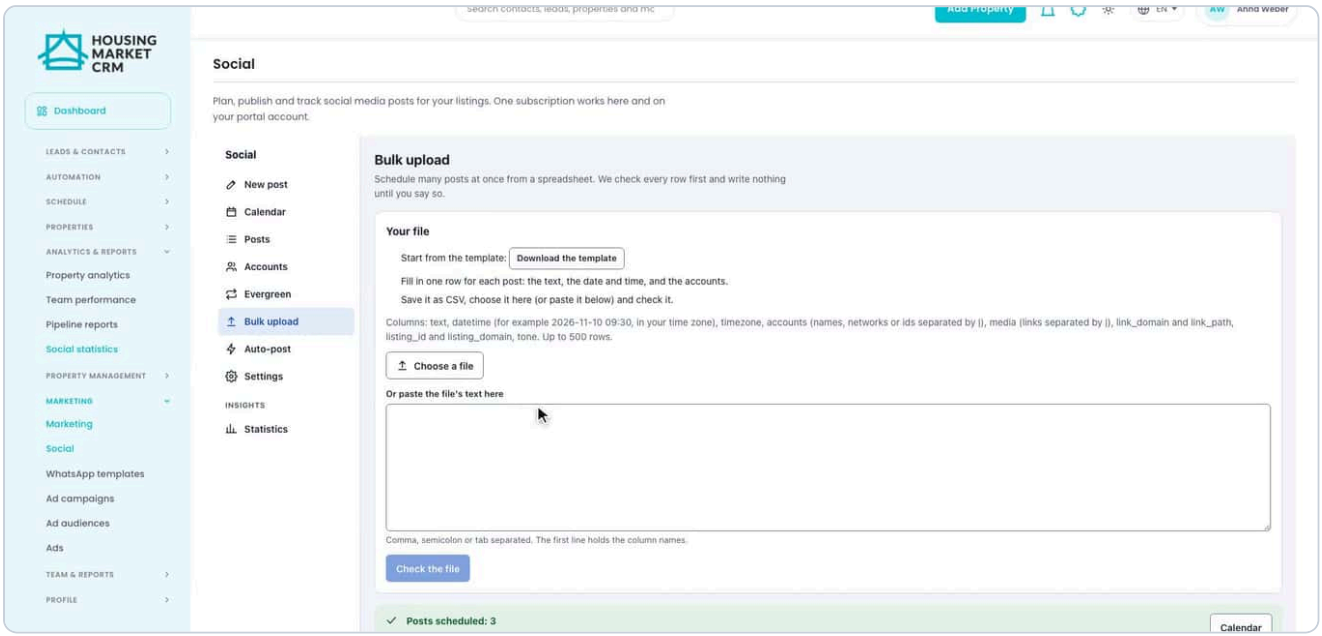


Figure 84.9 · Screen recorded 28 October 2026

10 They are **scheduled**. Find them under **Posts** and on the **Calendar**.

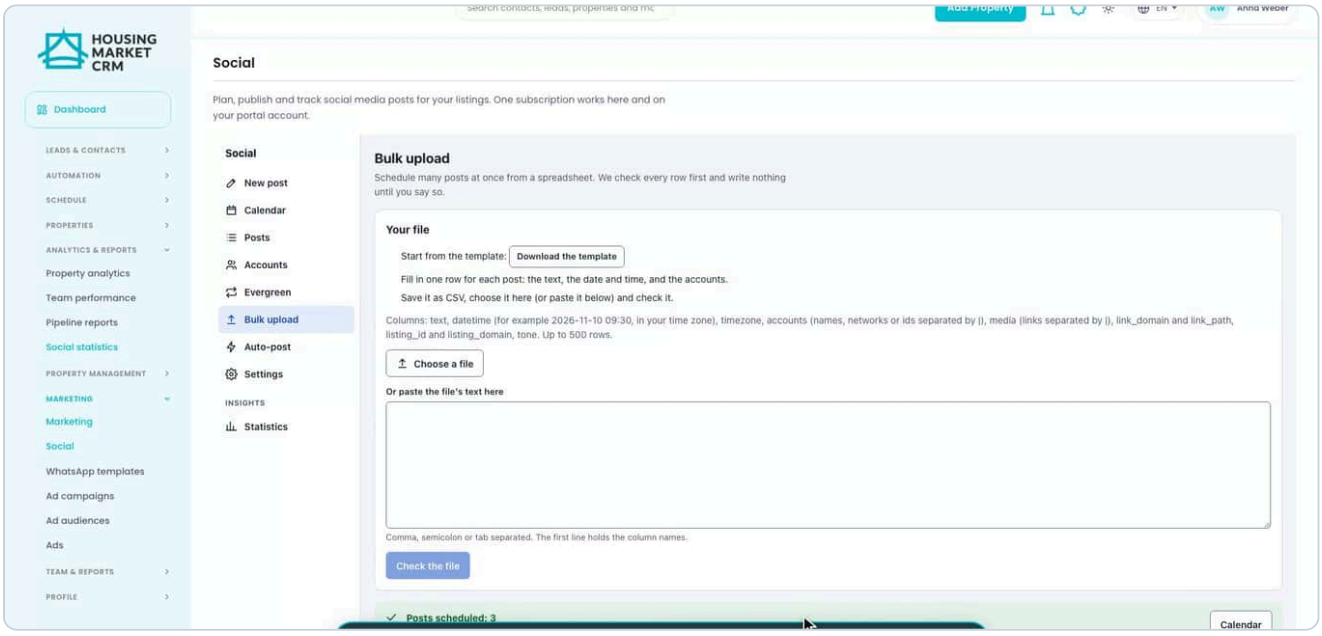


Figure 84.10 · Screen recorded 28 October 2026

GOOD TO KNOW

NOTE

Evergreen lists repeat posts about you, tips or testimonials on a schedule. Bulk upload schedules many posts at once from a CSV file.

Help Center: What are evergreen lists and bulk upload in Housing Market Social?

85 CHAPTER 85

Social statistics and tracked links

Housing Market Social add-on | For agents | Watch the video

OVERVIEW

Posts, link clicks, listing visits and enquiries for the last 7, 30 or 90 days, by network and by post, with the numbers each network shares and a CSV or PDF report.

Statistics opens with a summary for the period you choose, the last 7, 30 or 90 days: posts, link clicks, listing visits and enquiries. Clicks, visits and enquiries come from your own short links; link previews and robots are not counted.

Below it you see the numbers by network, your top posts ranked by engagement, link clicks or enquiries, each post with its own numbers, and for each profile how its followers changed over the period.

Reach, impressions, likes, comments and shares come from each network, and each network decides what it shares. Where a network does not provide a number, Statistics says so instead of showing zero, and numbers for posts you published yourself on a network are not available.

You can download the posts of a period with their numbers as CSV or PDF. For some languages the PDF is in English; the CSV has every language. A period with more posts than a report holds must be shortened.

From the Help Center: **What do Housing Market Social statistics show?**

Each post link is a short link that counts clicks and visits to your listing, and an enquiry made soon after is credited to the post. In the CRM it arrives as a lead with the source Social and the network.

When a post links to one of your listings, Social gives each network its own short link that opens the listing on its portal. That is how you can see which network brought people.

Clicks, visits to the listing and enquiries are counted from your own short links. Link previews and robots are not counted.

An enquiry is credited to a post when it is made within 30 days of a click on the same device. Someone who clicks on a phone and enquires later on a computer appears as an ordinary enquiry.

In Housing Market CRM the lead shows the source Social and the network, for example Social: LinkedIn. That is true on every CRM plan, Free included.

From the Help Center: **How does Housing Market Social track clicks and enquiries?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

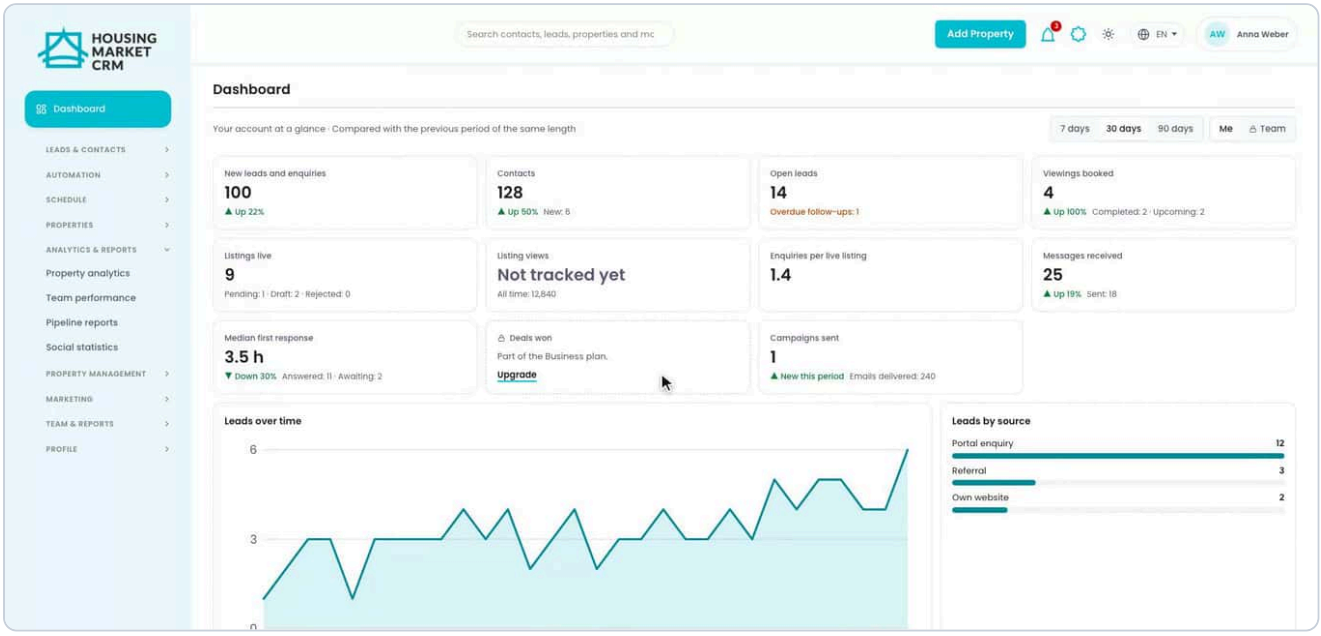


Figure 85.1 · Screen recorded 28 October 2026

2 Under **Analytics & reports**, click **Social statistics**.

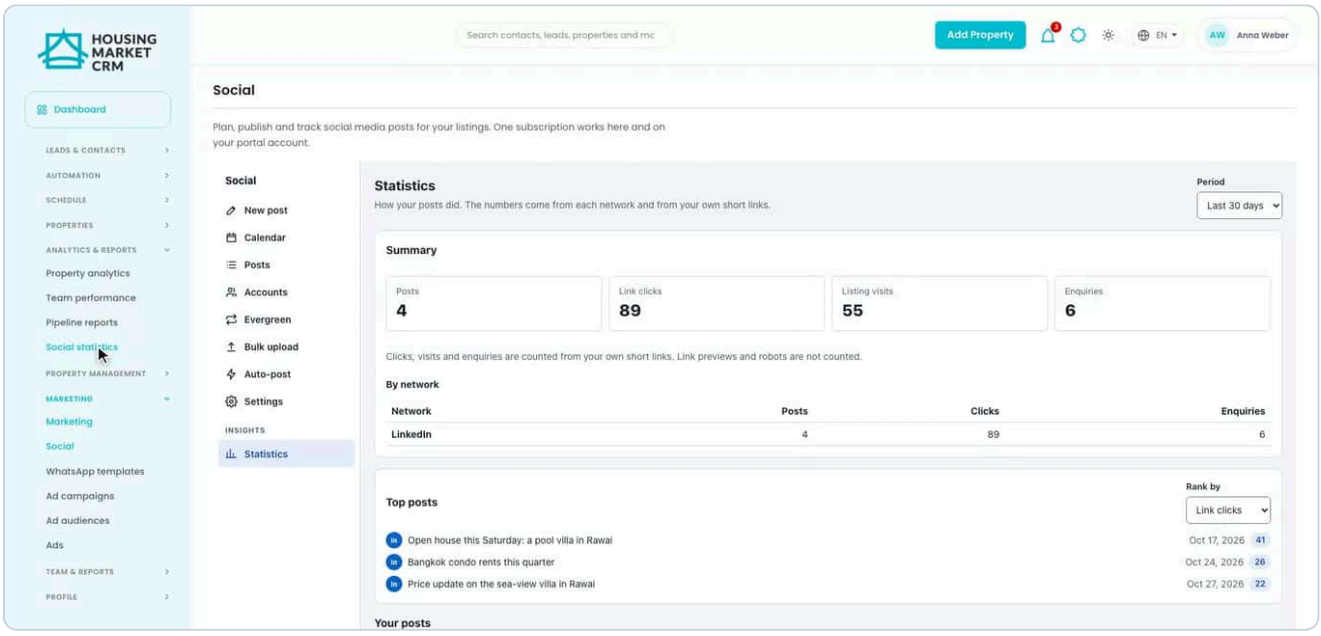


Figure 85.2 · Screen recorded 28 October 2026

3 Your **posts**, **link clicks**, **listing visits** and **enquiries** for the period.

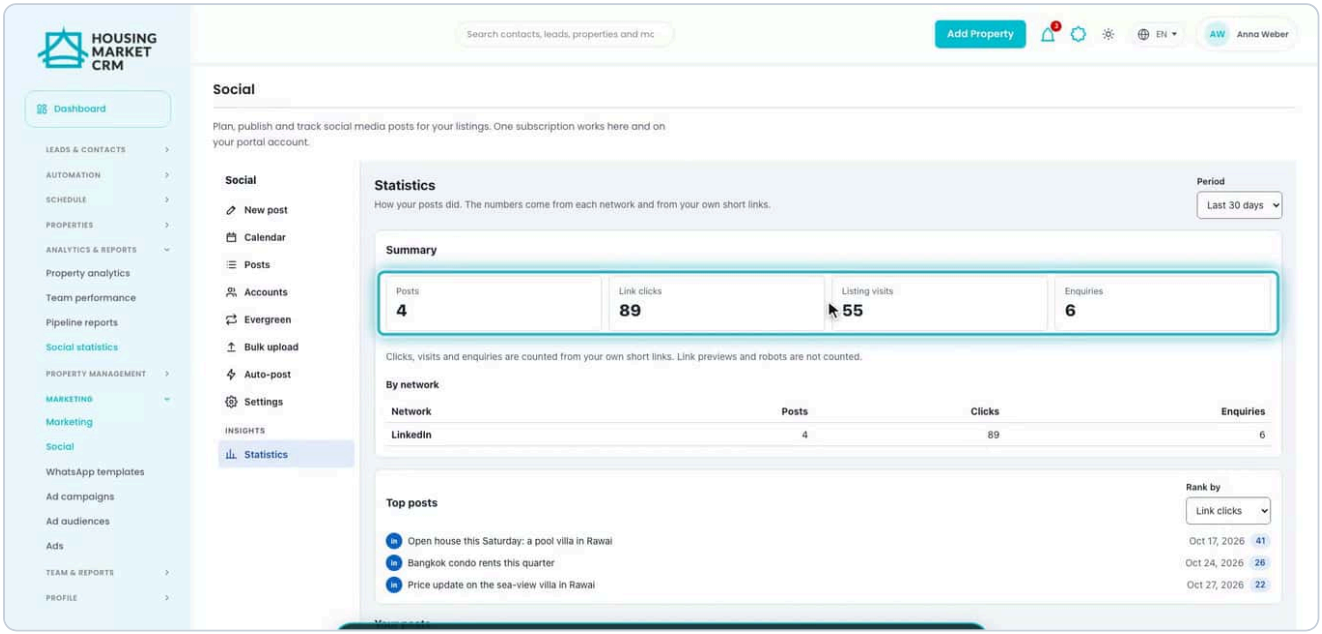


Figure 85.3 · Screen recorded 28 October 2026

4 They are counted from **your own short links**. Robots are not counted.

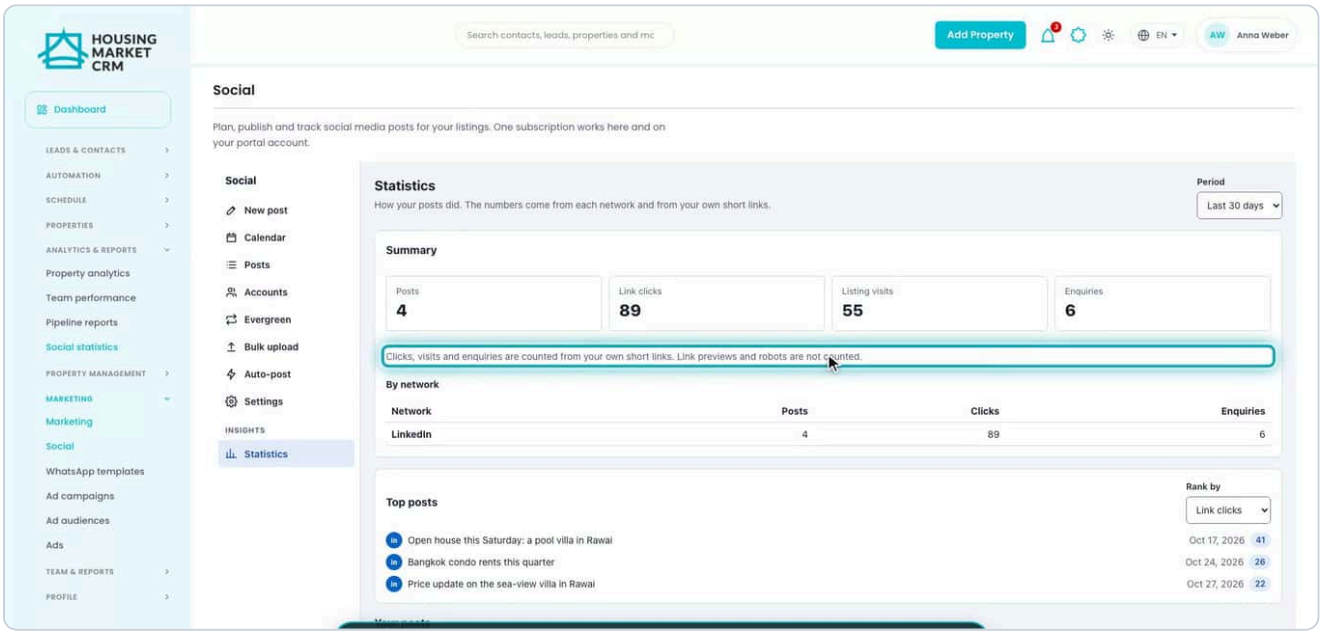


Figure 85.4 · Screen recorded 28 October 2026

5 Change the **period** here: 7, 30 or 90 days.

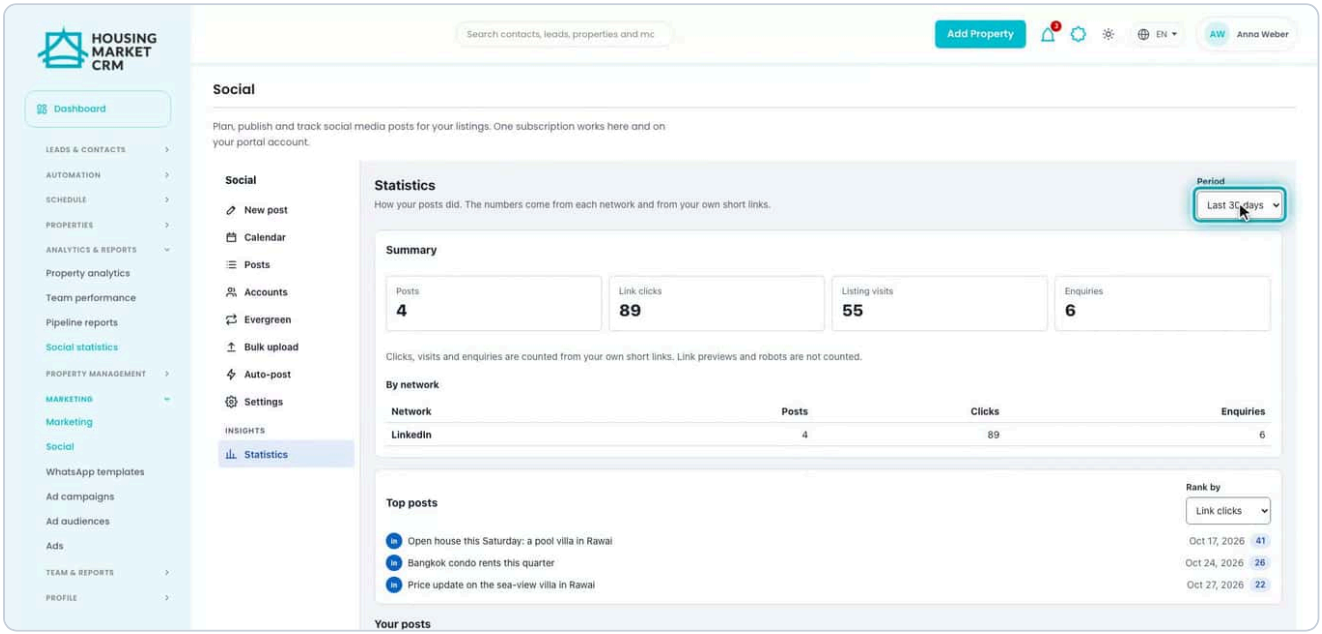


Figure 85.5 · Screen recorded 28 October 2026

6 **Top posts** shows which posts did best.

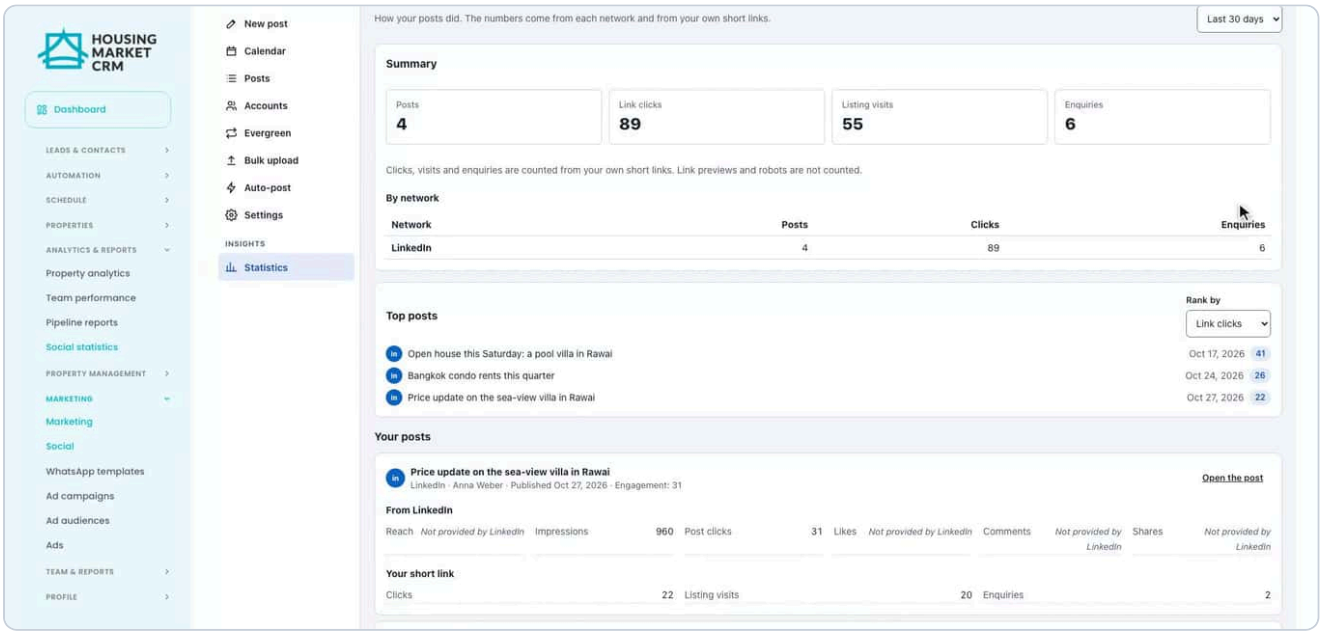


Figure 85.6 · Screen recorded 28 October 2026

7 Rank them by **Link clicks**: the posts that sent people to your listings.

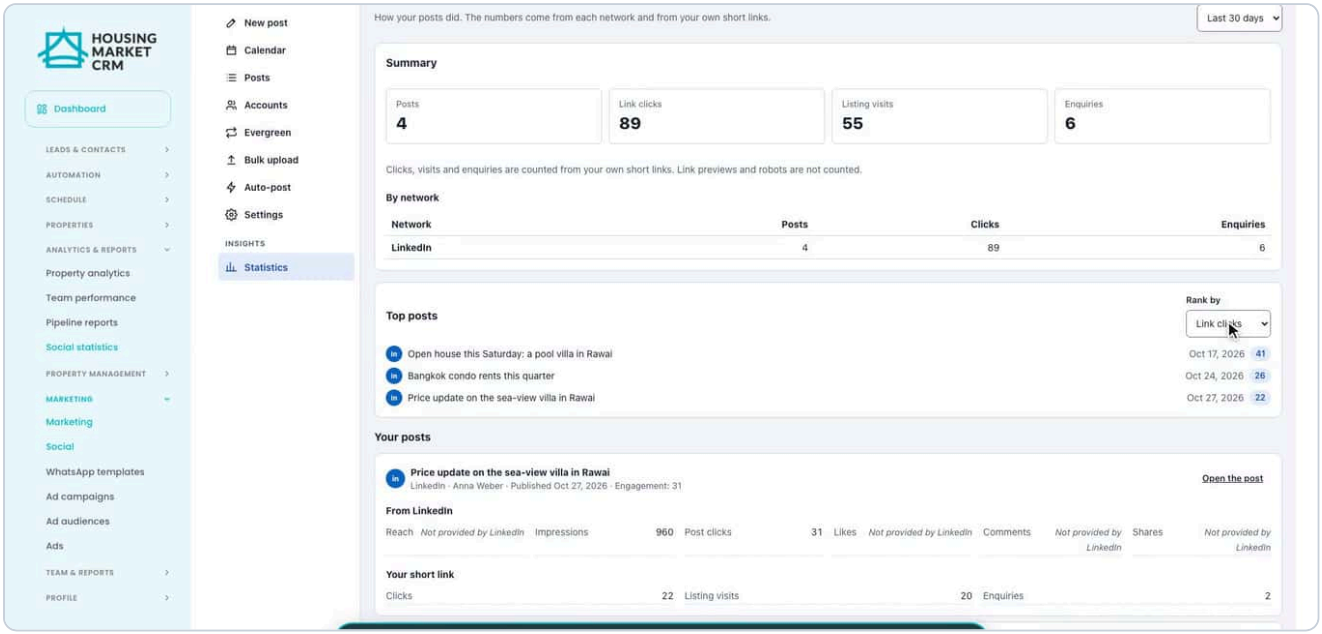


Figure 85.7 · Screen recorded 28 October 2026

8 Under **Your posts**, each post has two sets of numbers.

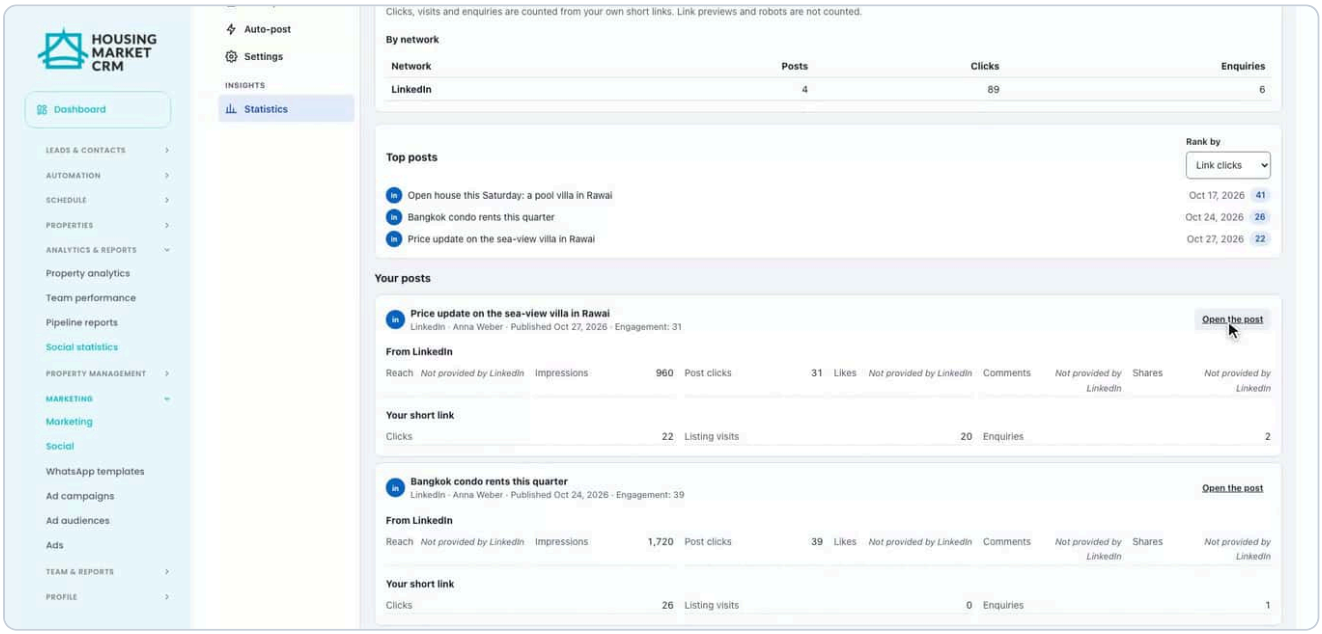


Figure 85.8 · Screen recorded 28 October 2026

9 From LinkedIn: impressions and post clicks.

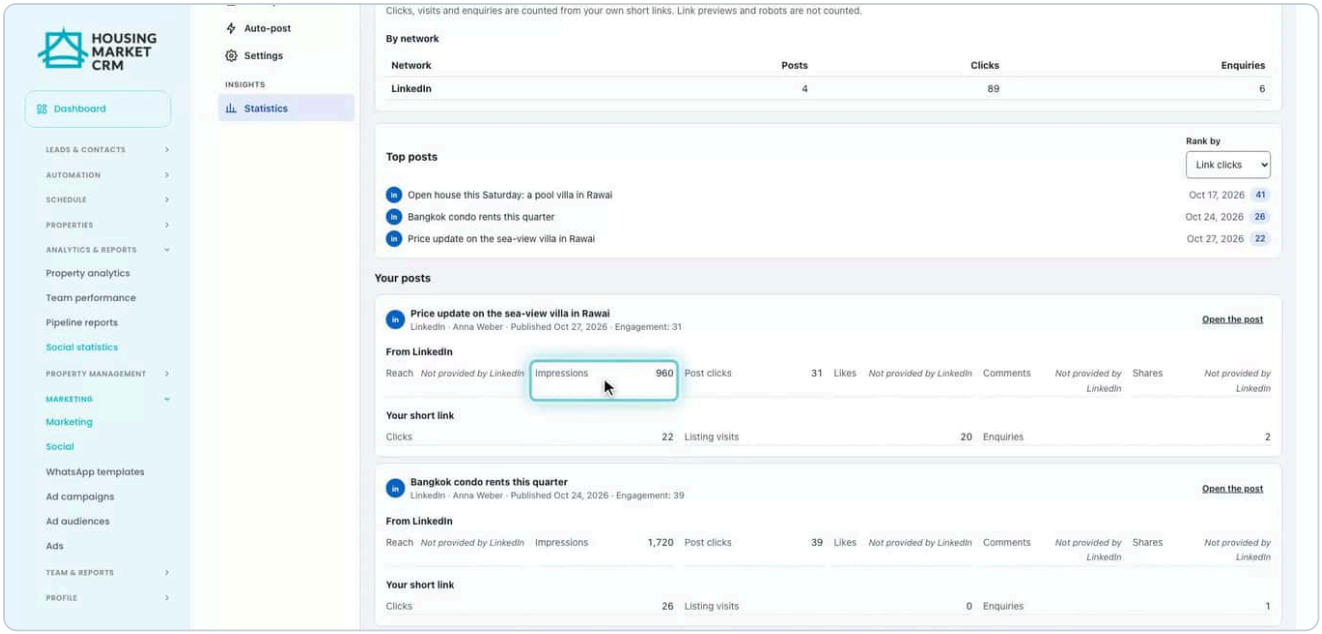


Figure 85.9 · Screen recorded 28 October 2026

10 What LinkedIn does not share says Not provided by LinkedIn, never zero.

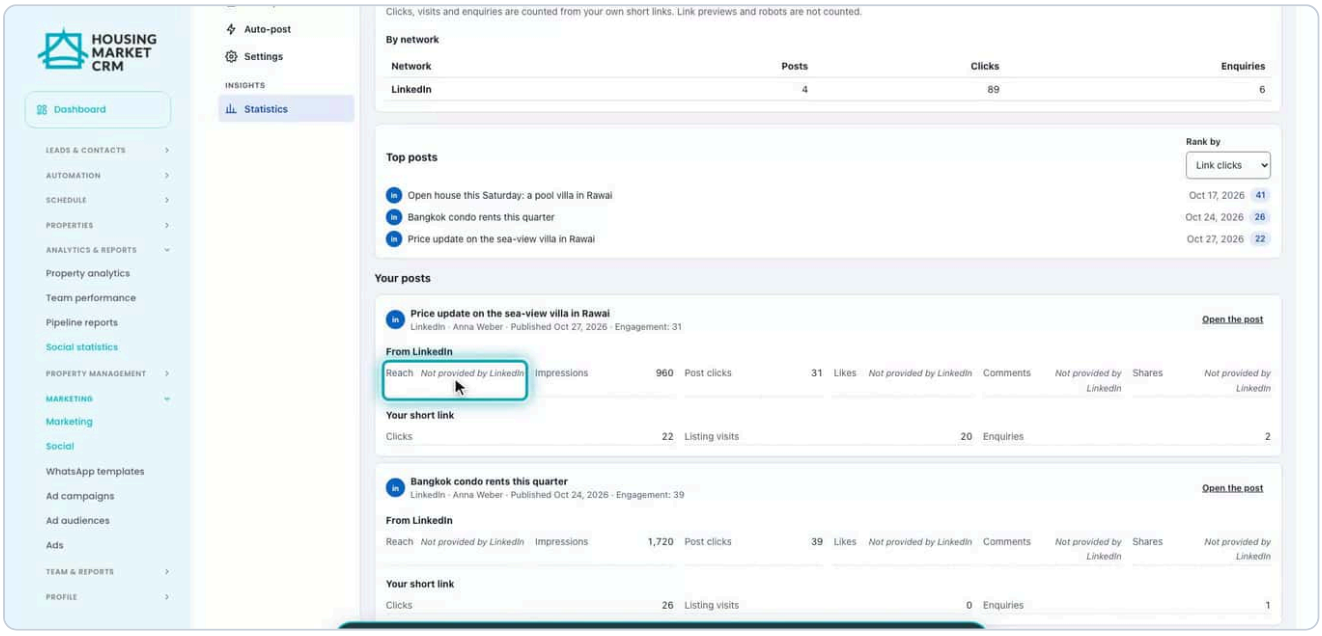


Figure 85.10 · Screen recorded 28 October 2026

11 Your short link: clicks, listing visits and enquiries.

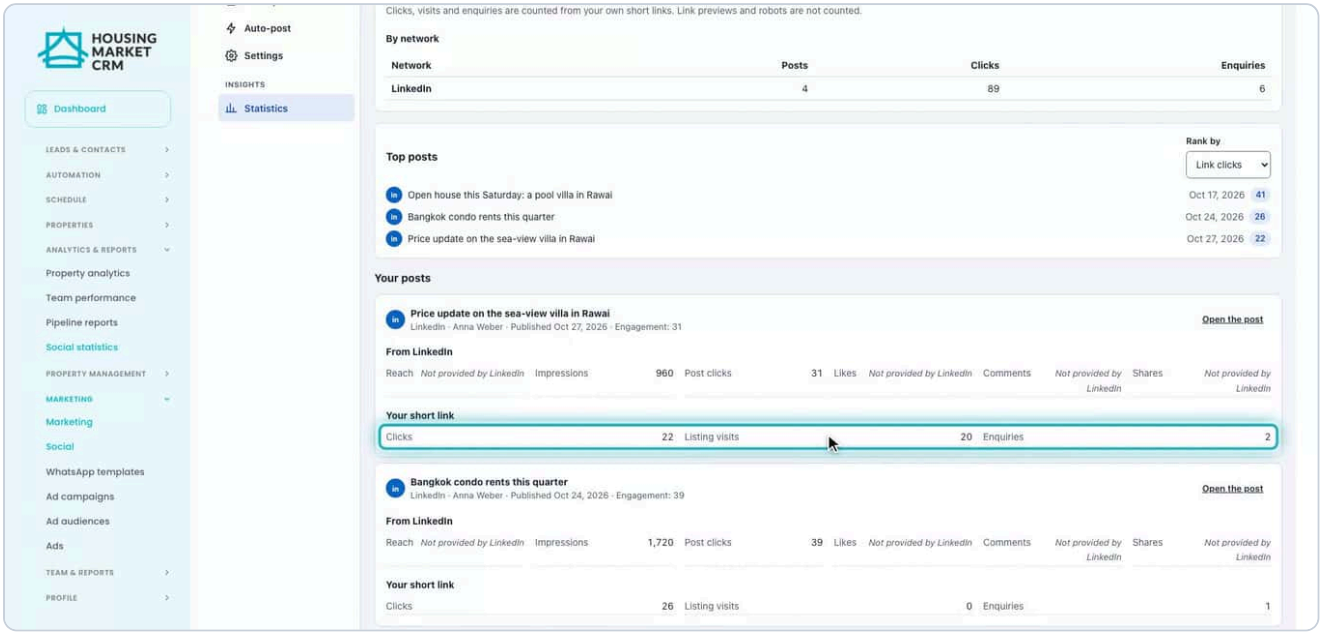


Figure 85.11 · Screen recorded 28 October 2026

12 Download the period as a CSV or PDF report.

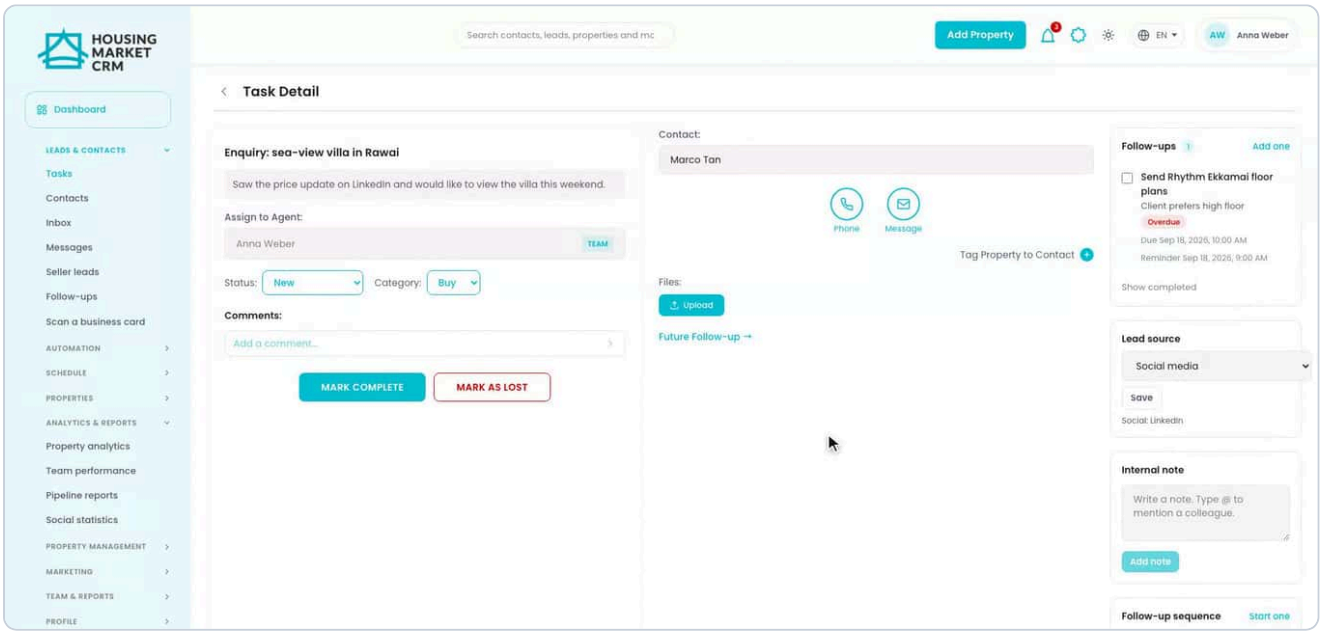


Figure 85.12 · Screen recorded 28 October 2026

13 An enquiry from one of your links arrives as a **lead**.

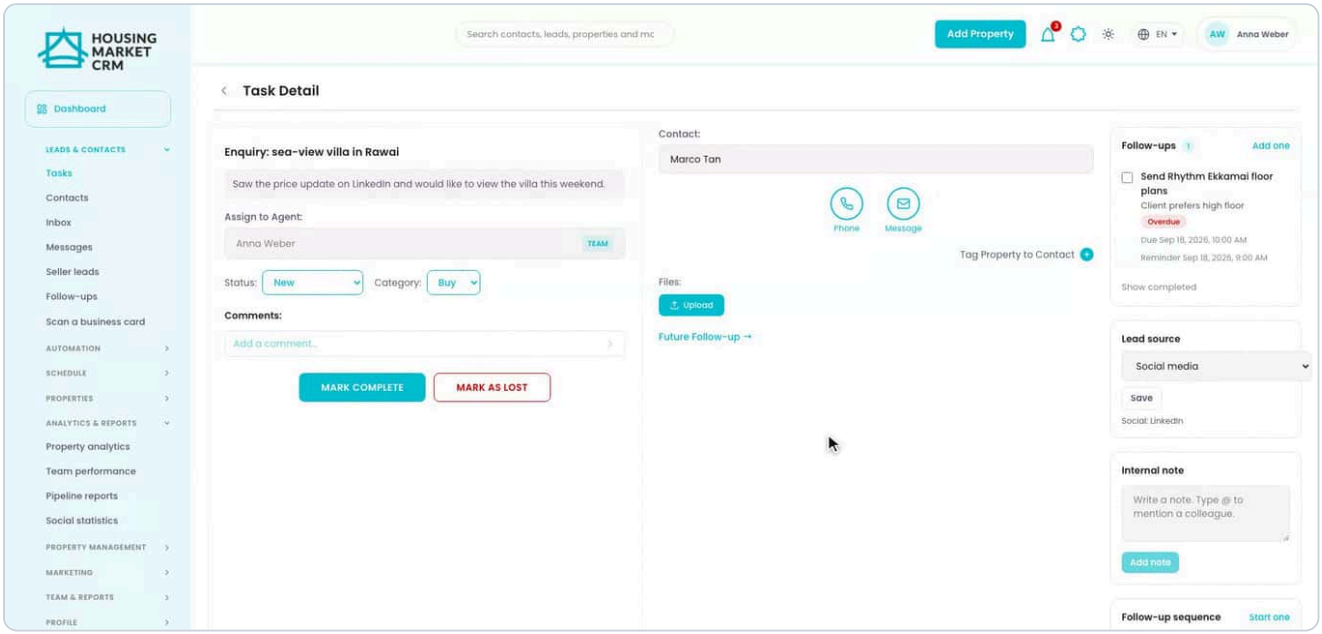


Figure 85.13 · Screen recorded 28 October 2026

14 Its **Lead source** says **Social: LinkedIn**.

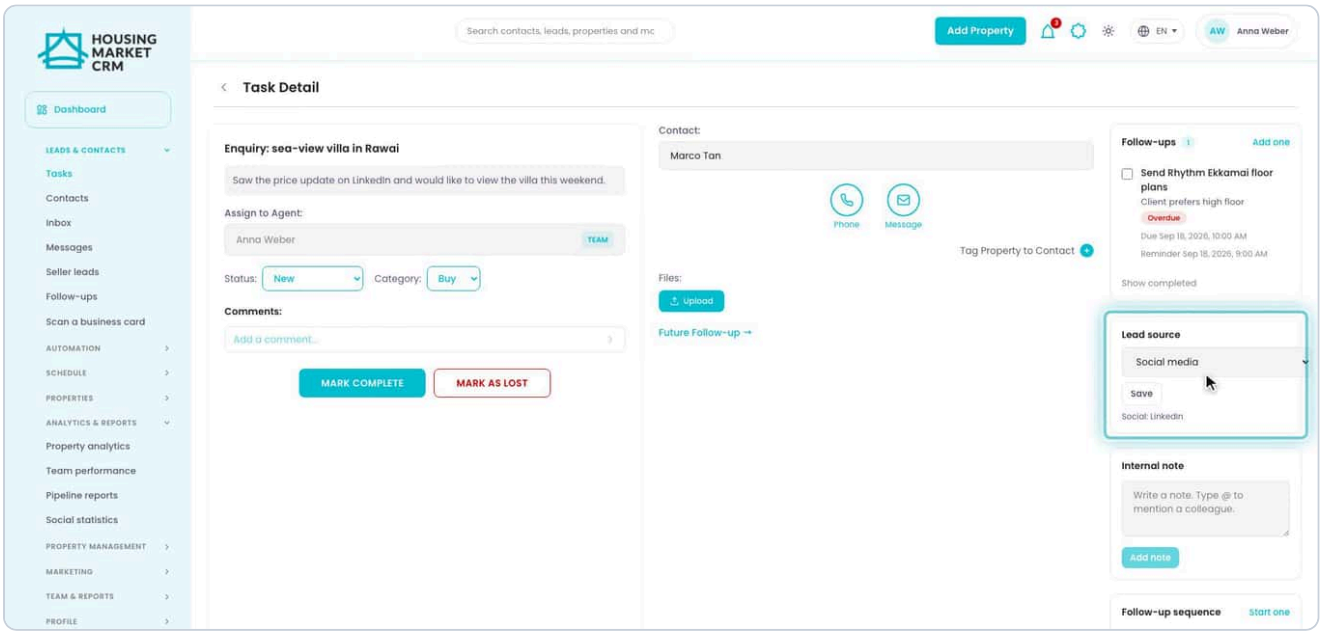


Figure 85.14 · Screen recorded 28 October 2026

GOOD TO KNOW

BETA Three screens are new and carry a Beta marker in the app: Links, By property and Your data. Tell us what you think.

UPDATING The inbox for comments and messages is built but not open yet, so the comments and messages of your connected accounts are not collected. Answer them on the network for now.

86 CHAPTER 86

Social settings

Housing Market Social add-on | For agents | Watch the video

OVERVIEW

Choose the first day of the week, the time zone, the starting tone and the language for listing posts, and see your subscription and notifications.

Open Settings in Social. Under Display you can choose:

- The week starts on: Monday or Sunday, for the Calendar.
- Time zone: posts are scheduled and shown in this time zone. Automatic uses the one your browser reports.
- Default tone for listing posts: the starting tone when you create a post from a listing. You can change it each time.
- Language of listing posts: the language the text of a listing post is written in, or the same as the app.

These display choices are kept in the browser you are using, so on another browser or computer you choose them again.

Settings also shows your subscription (its state, when it renews or ends, and Manage billing) and your notifications, where Social tells you when an account needs reconnecting or a post could not go out. Your accounts and your data lets you delete your statistics, your inbox or your connected accounts, and you can disconnect an account at any time from Accounts.

From the Help Center: **What can I change in the Housing Market Social settings?**

STEP BY STEP

1 Open **Settings** in **Marketing > Social**.

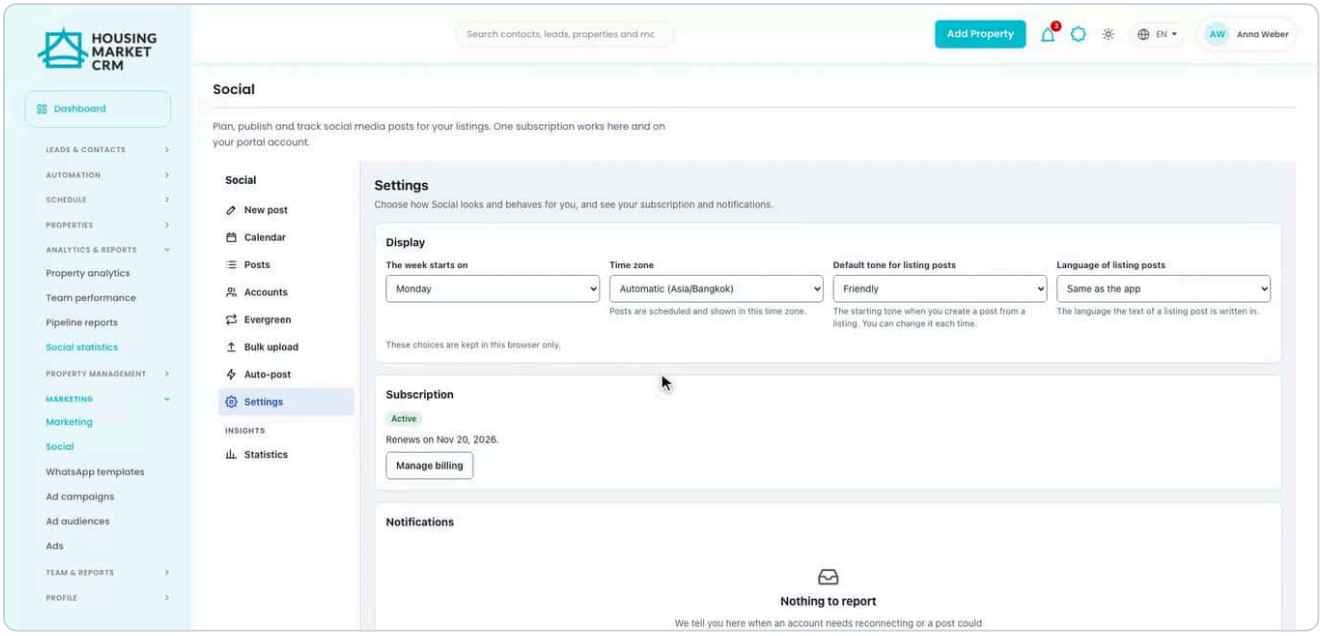


Figure 86.1 · Screen recorded 28 October 2026

2 Choose the **first day of the week** for your calendar.

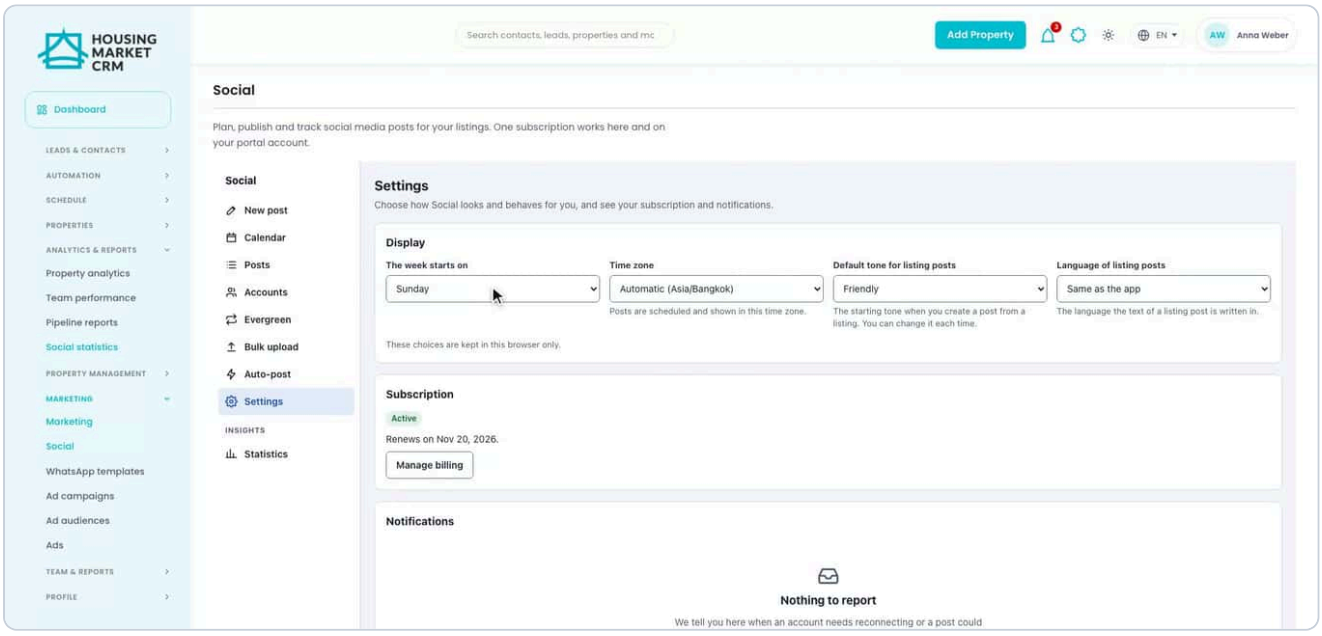


Figure 86.2 · Screen recorded 28 October 2026

3 Pick your **time zone**. Every scheduled time uses it.

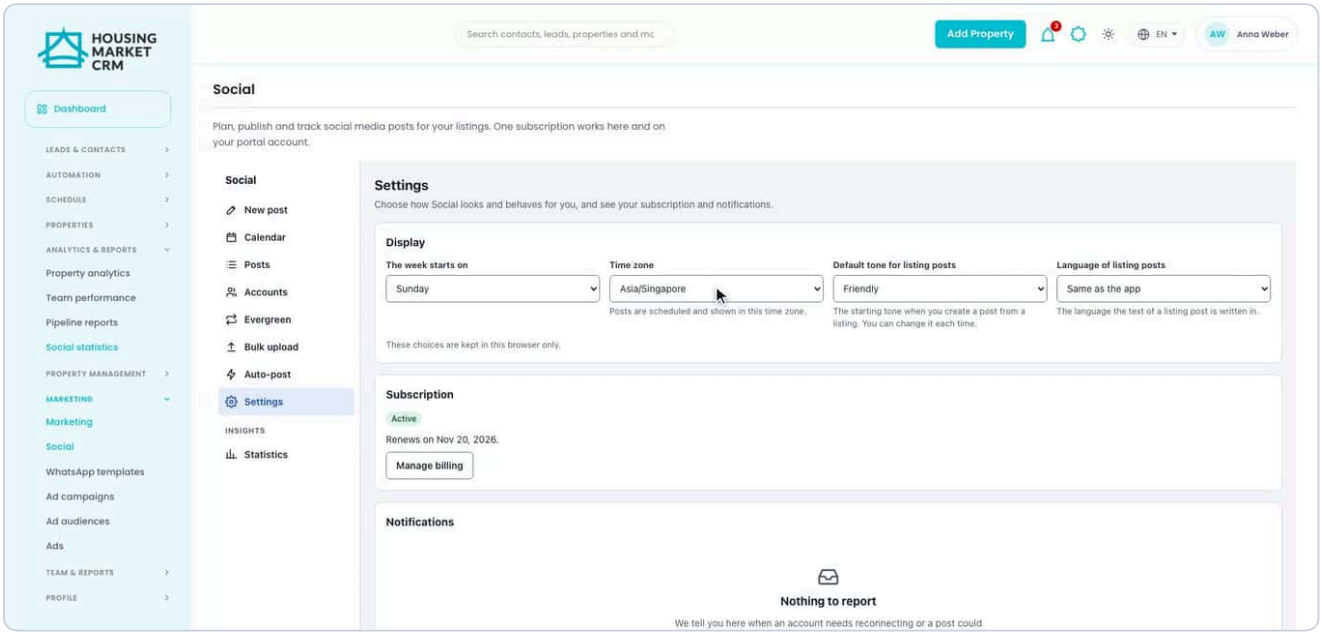


Figure 86.3 · Screen recorded 28 October 2026

4 Set the **default tone** of posts written from a listing and their **language**. You can change both for each post.

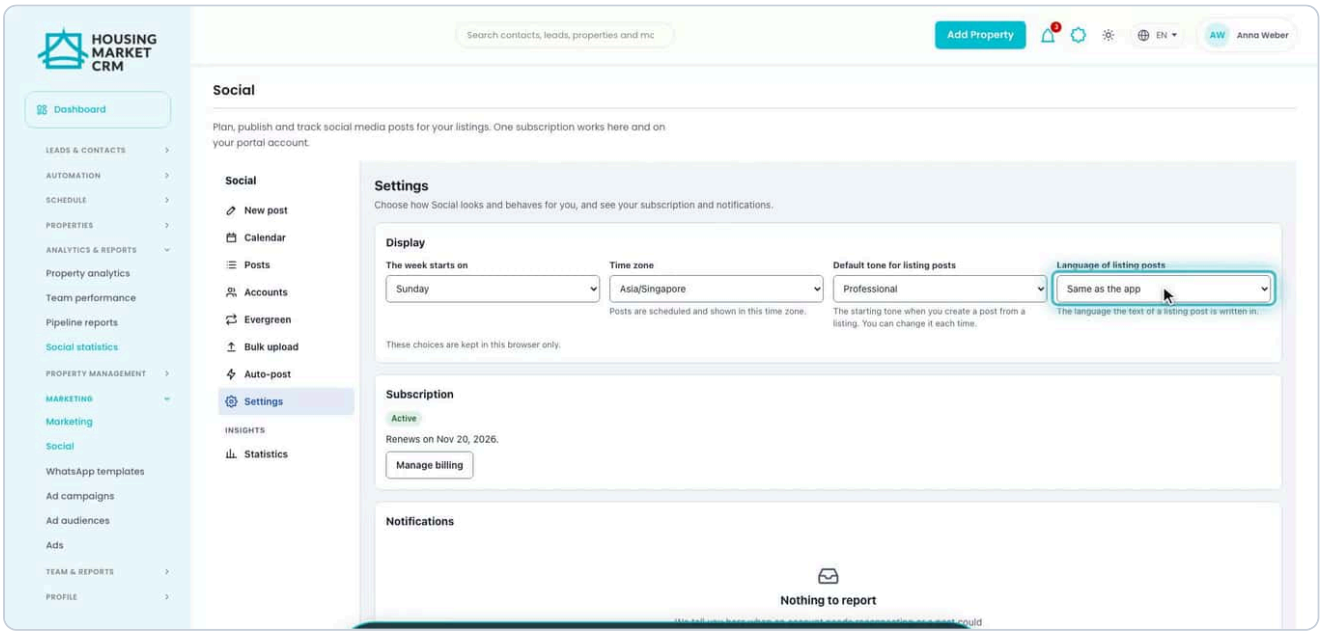


Figure 86.4 · Screen recorded 28 October 2026

5 These choices are kept **in this browser**.

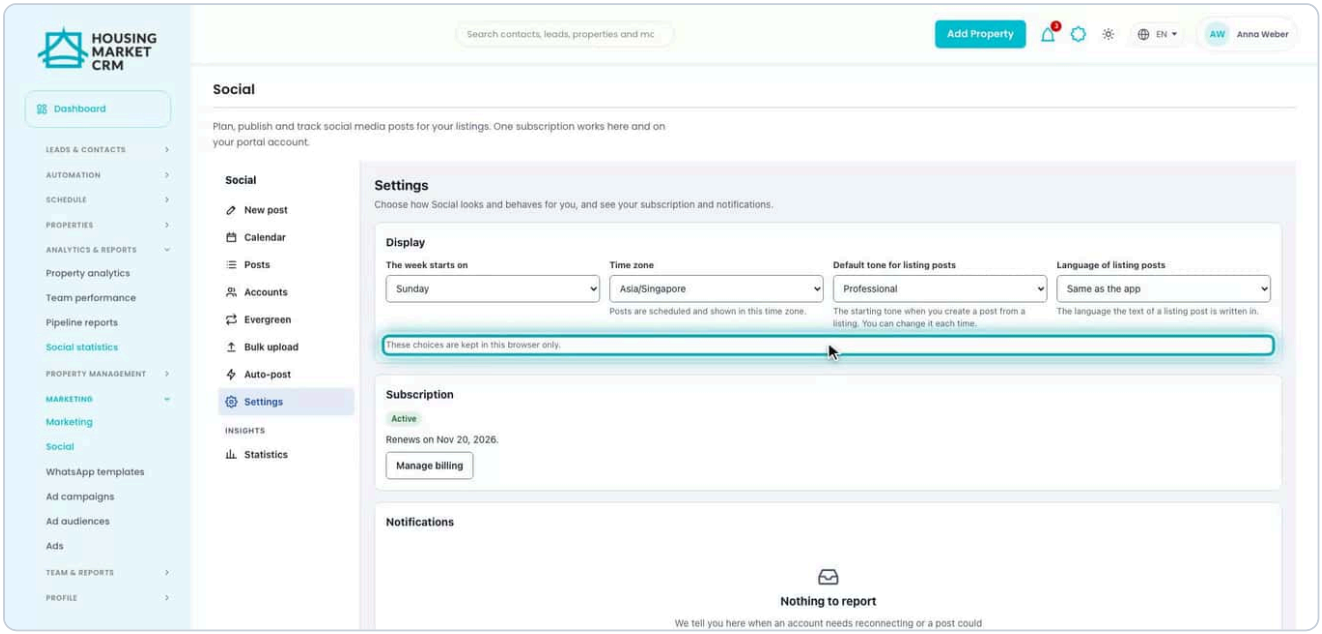


Figure 86.5 · Screen recorded 28 October 2026

6 **Subscription** shows your plan, its renewal date and **Manage billing**.

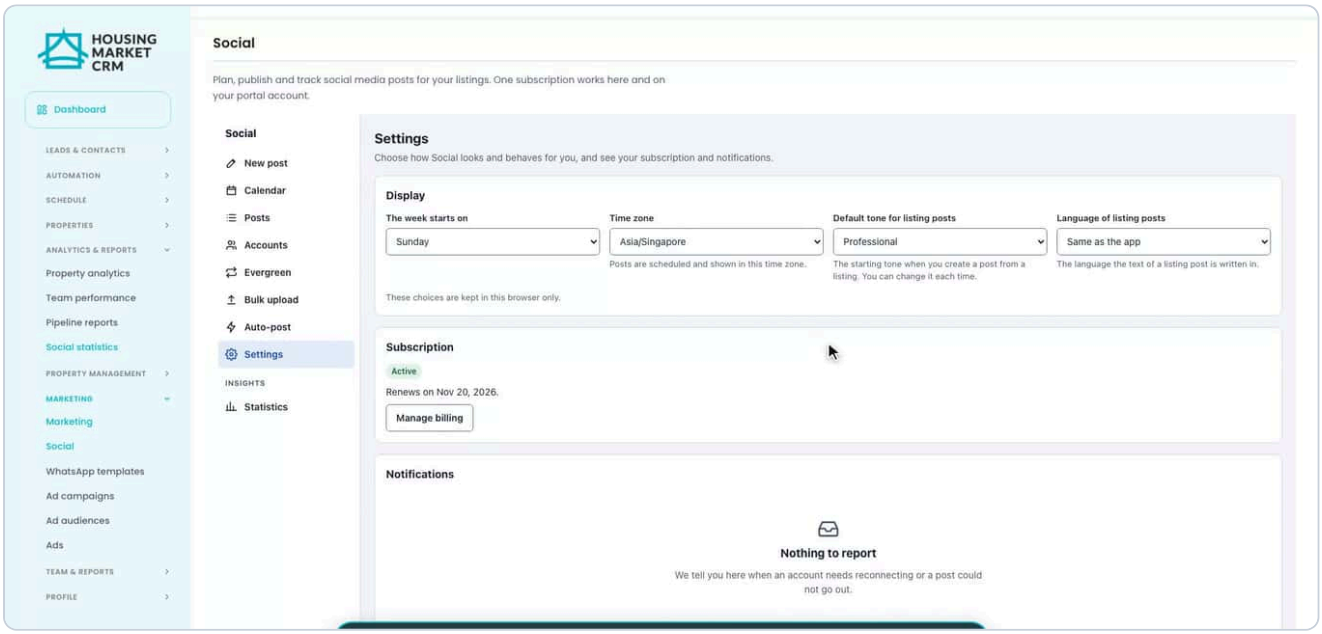


Figure 86.6 · Screen recorded 28 October 2026

7 **Notifications** tell you when an account needs reconnecting or a post did not go out.

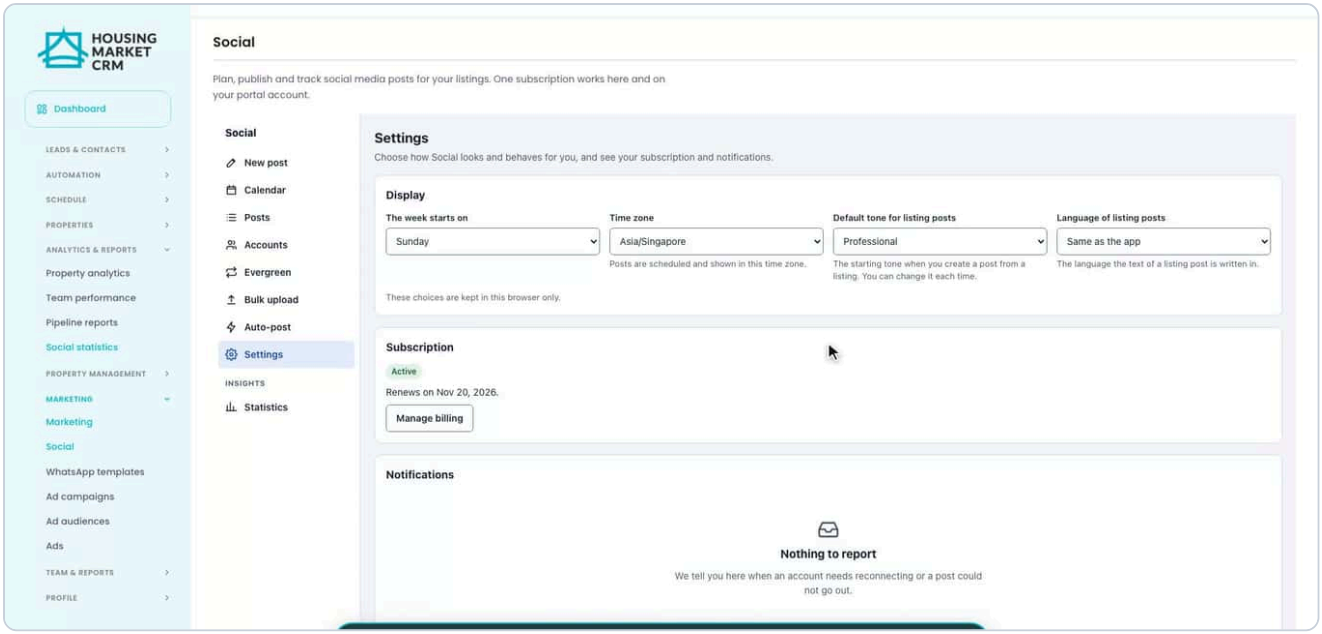


Figure 86.7 · Screen recorded 28 October 2026

8 The days and times you post at every week are a **queue**, under **Posts**.

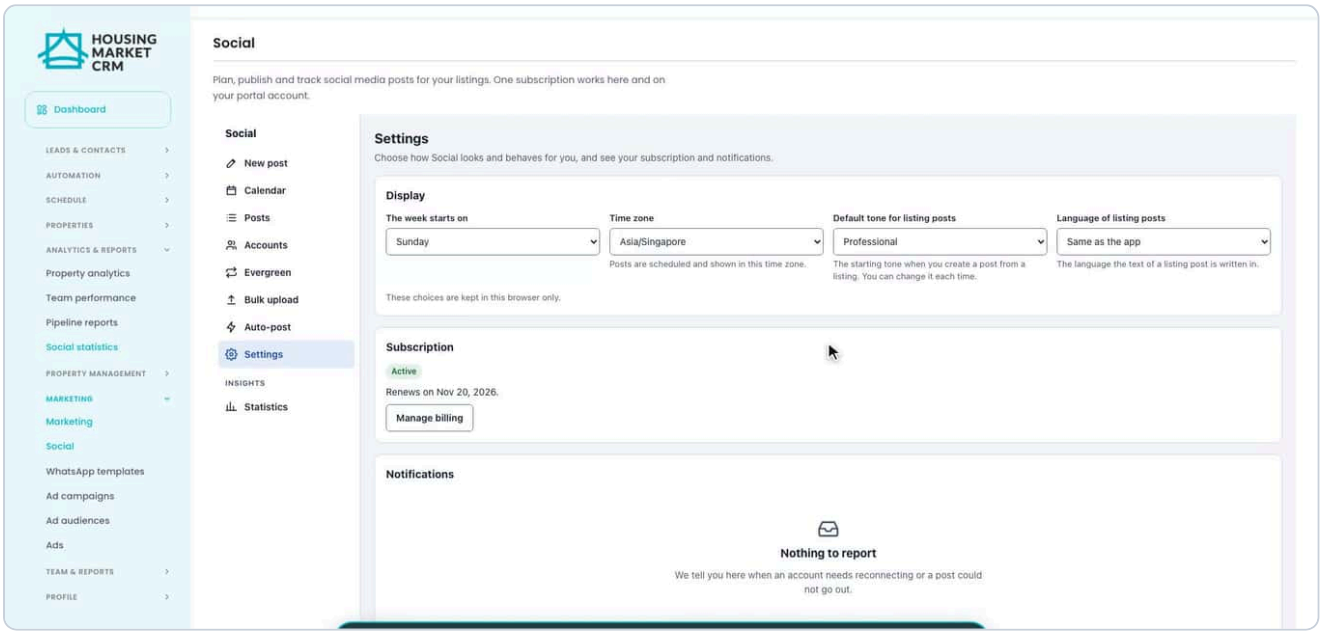


Figure 86.8 · Screen recorded 28 October 2026

87 CHAPTER 87

Post new listings with auto-post rules

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

Choose what posts itself when one of your listings goes live, drops in price, is sold or is rented. You switch each rule on or off for each account.

Under Auto-post, choose an event and an account and switch the rule on. When the event happens to one of your listings, Social makes a post from the listing and either schedules it or saves it as a draft for you to look at first, as you choose.

- Delay: the time, in minutes, to change your mind before it goes out.
- Smallest price drop, in percent: smaller drops are ignored.
- Quiet hours: a post due at night goes out when they end.
- Use the account's queue: the post takes the next free time in the queue instead of a delay.
- Language: leave the default to write in the account's language.

A rule posts only about listings that are live on your portal, and a post about a sold listing does not show the price. A list of what happened lately shows each post made, each draft and each time nothing was posted, with the reason.

From the Help Center: **How do auto-post rules work in Housing Market Social?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

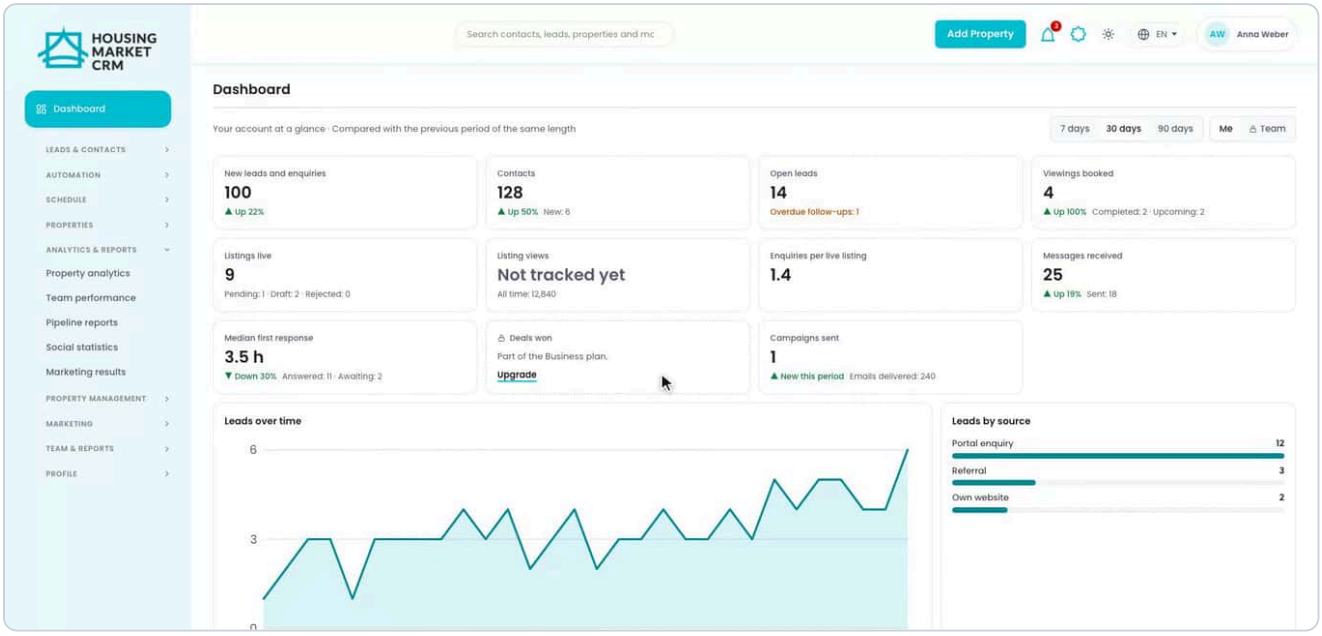


Figure 87.1 · Screen recorded 4 November 2026

2 Open **Marketing** in the left menu.

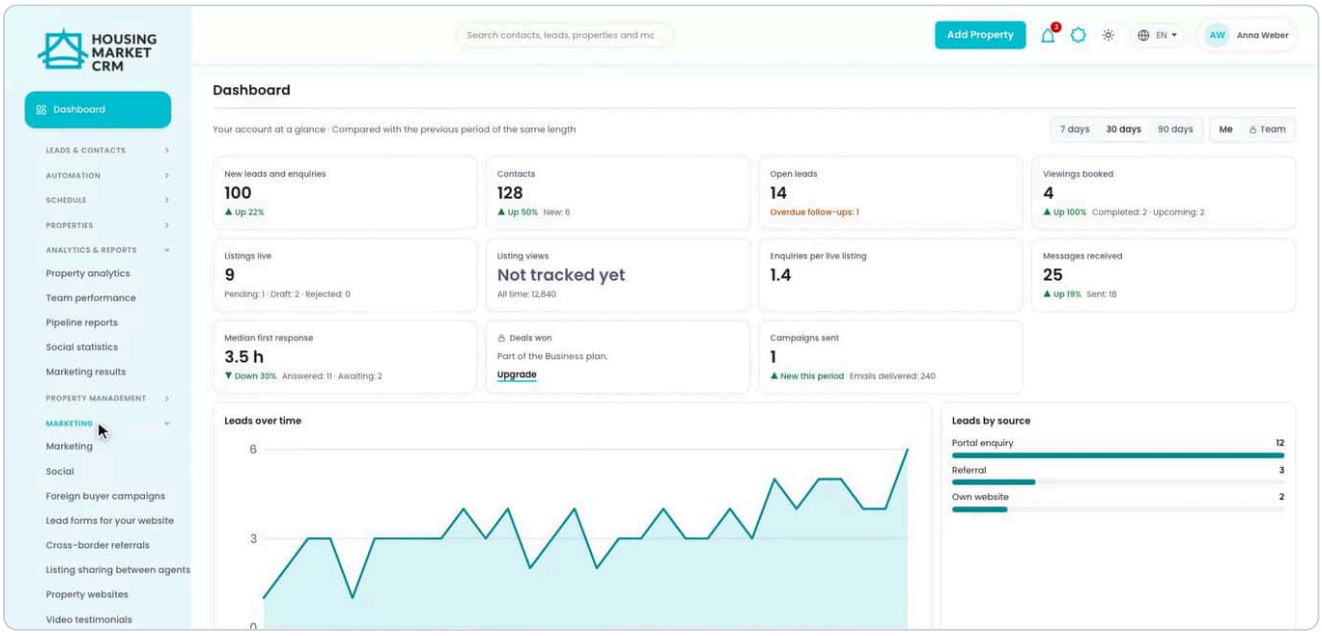


Figure 87.2 · Screen recorded 4 November 2026

3 Click **Social**.

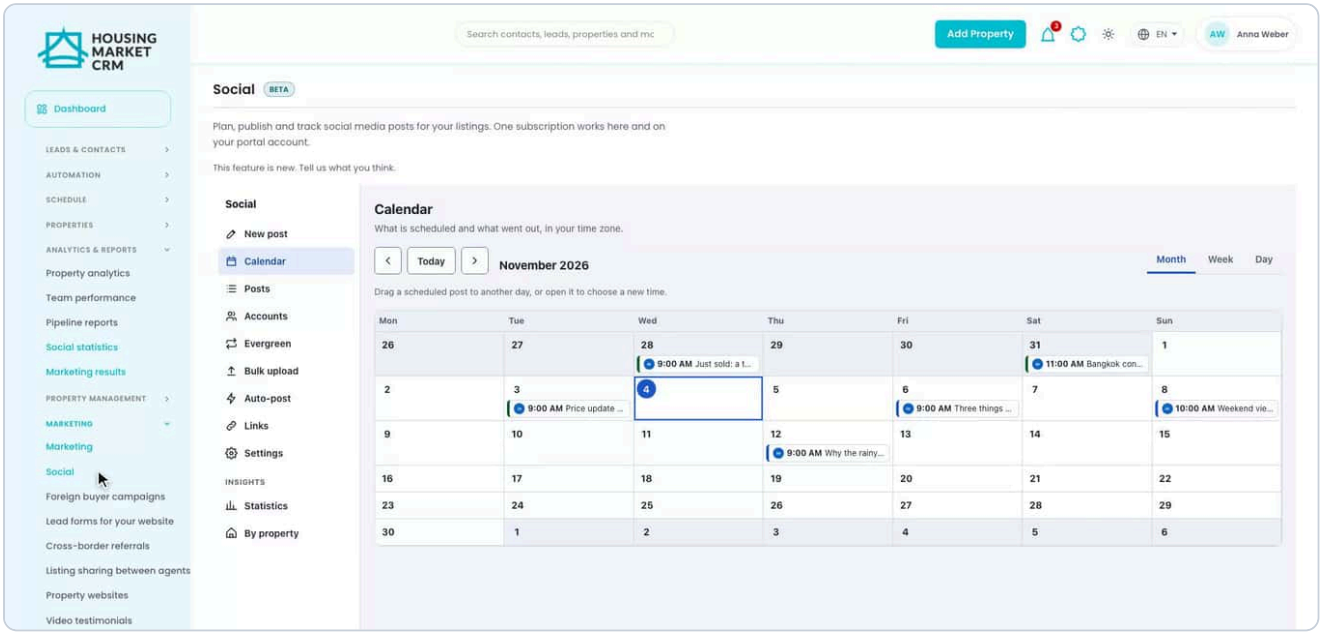


Figure 87.3 · Screen recorded 4 November 2026

4 Click **Auto-post**.

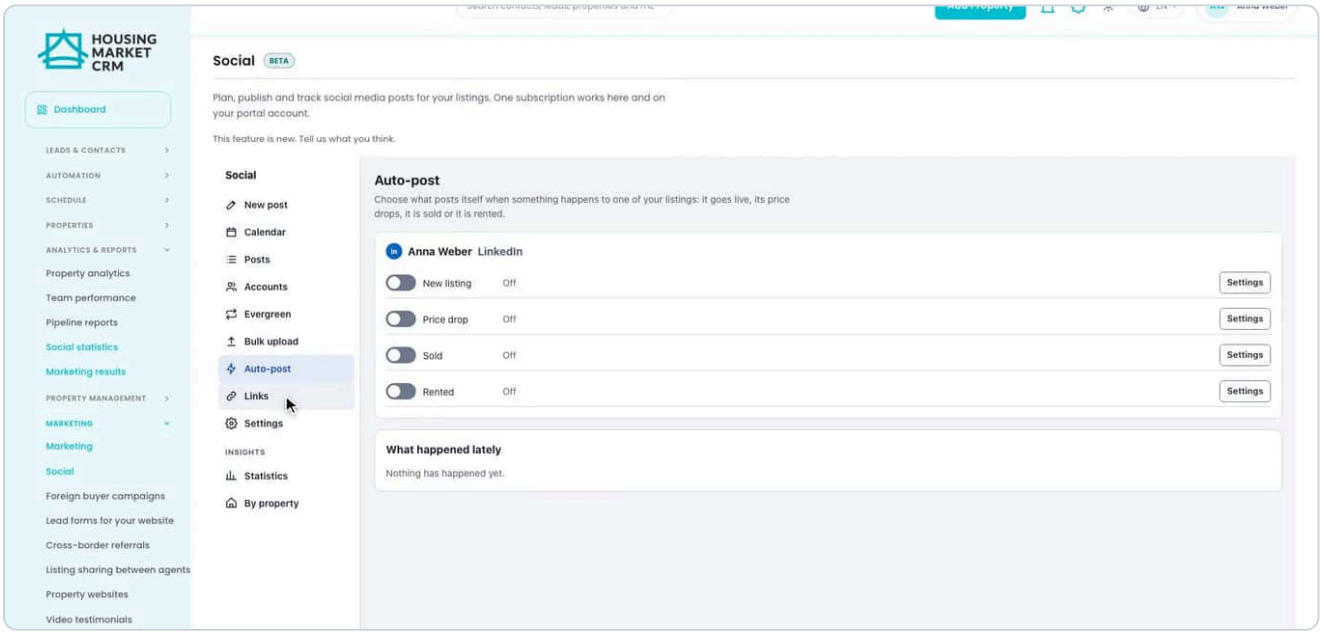


Figure 87.4 · Screen recorded 4 November 2026

5 Auto-post reacts to **four events** on your listings.

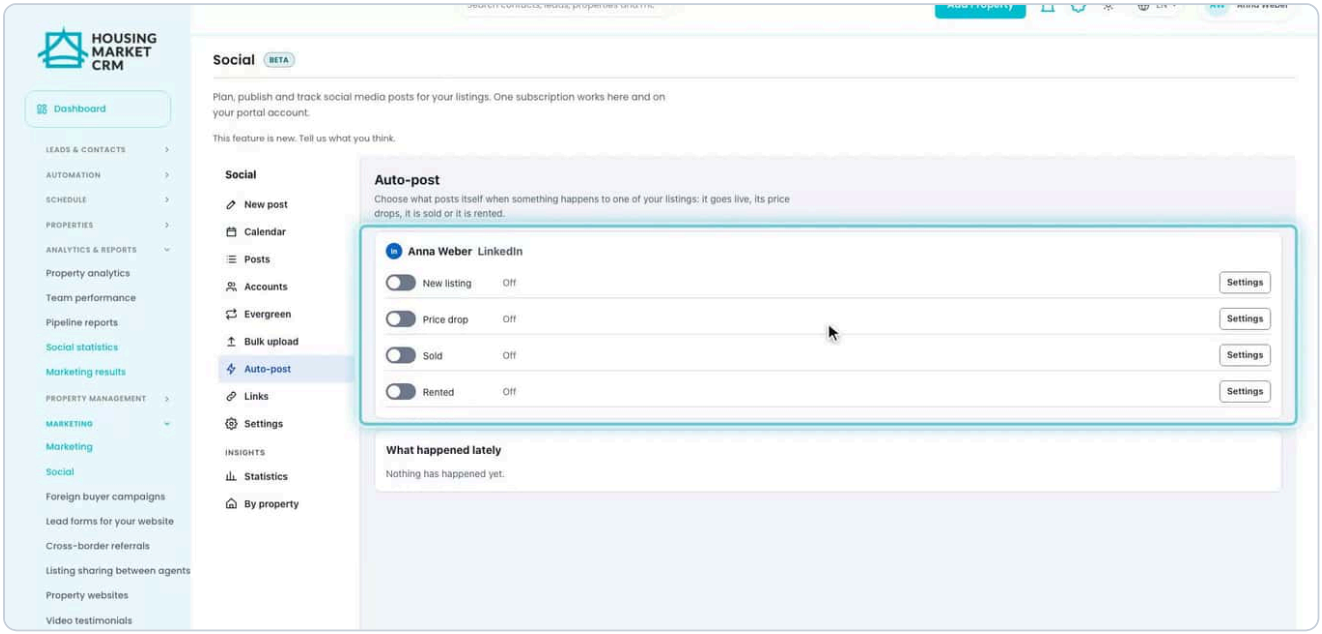


Figure 87.5 · Screen recorded 4 November 2026

6 **New listing**: a property goes live.

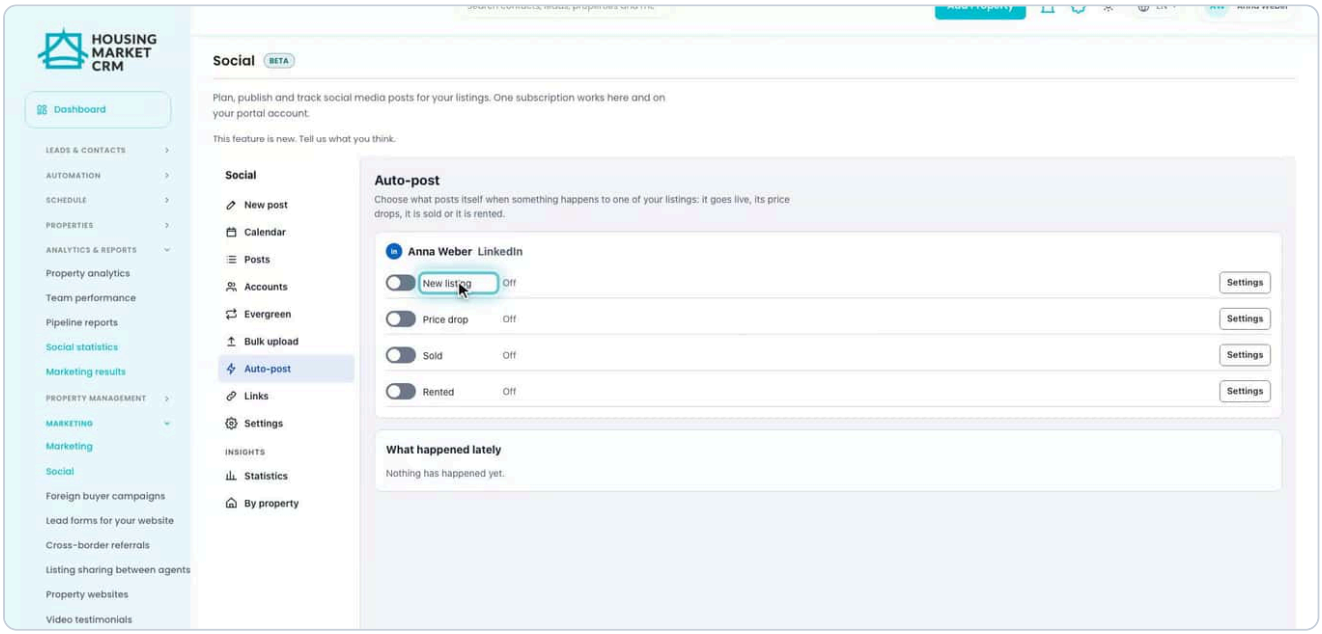


Figure 87.6 · Screen recorded 4 November 2026

7 **Price drop**: the price comes down.

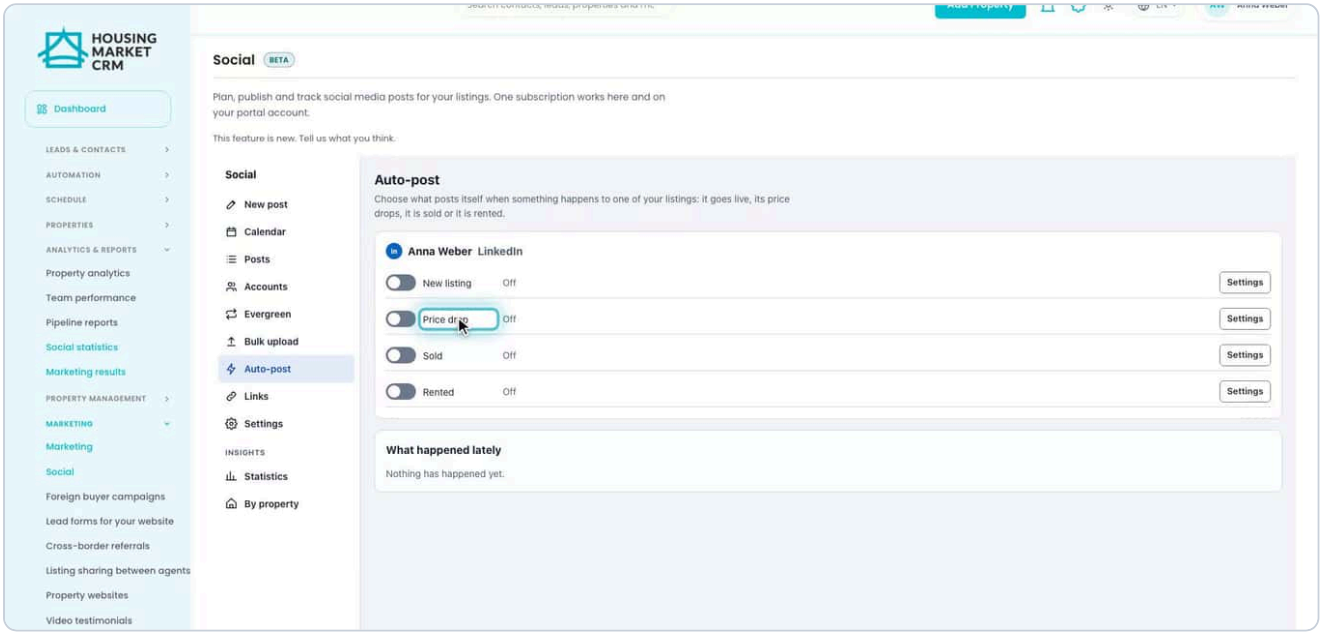


Figure 87.7 · Screen recorded 4 November 2026

8 **Sold** and **Rented** follow a deal you close in the CRM.

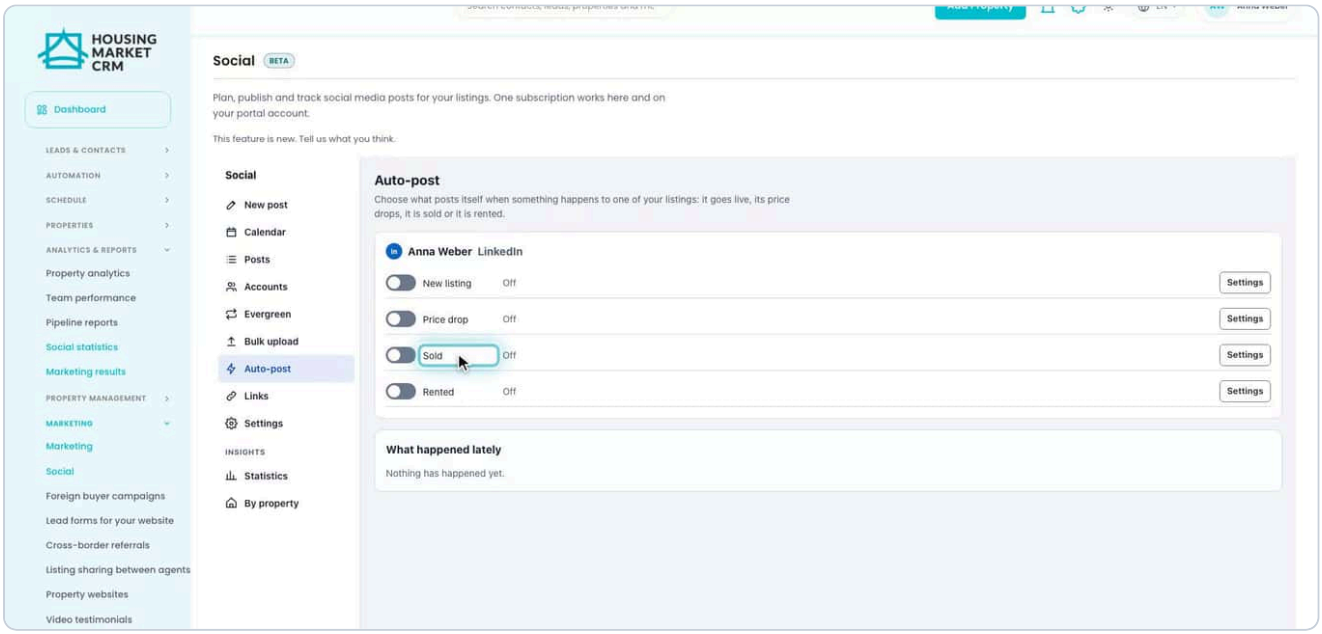


Figure 87.8 · Screen recorded 4 November 2026

9 Every event starts **off**, so nothing posts until you turn it on.

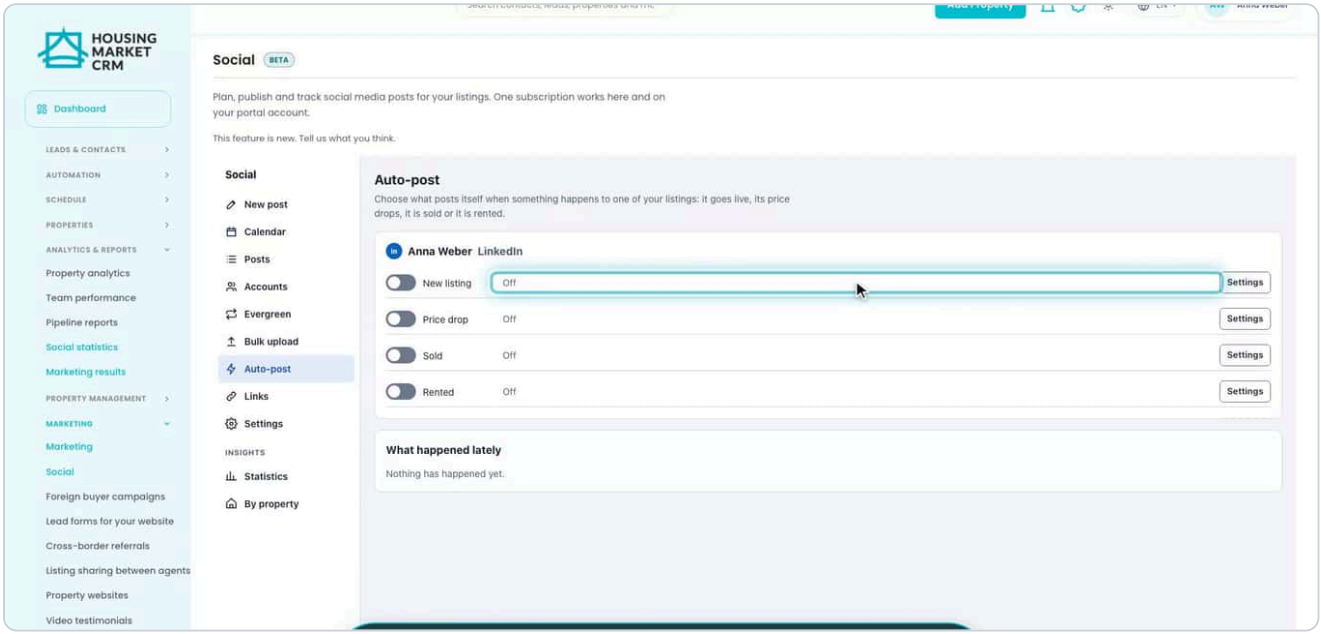


Figure 87.9 · Screen recorded 4 November 2026

10 Click **Settings** next to **New listing**.

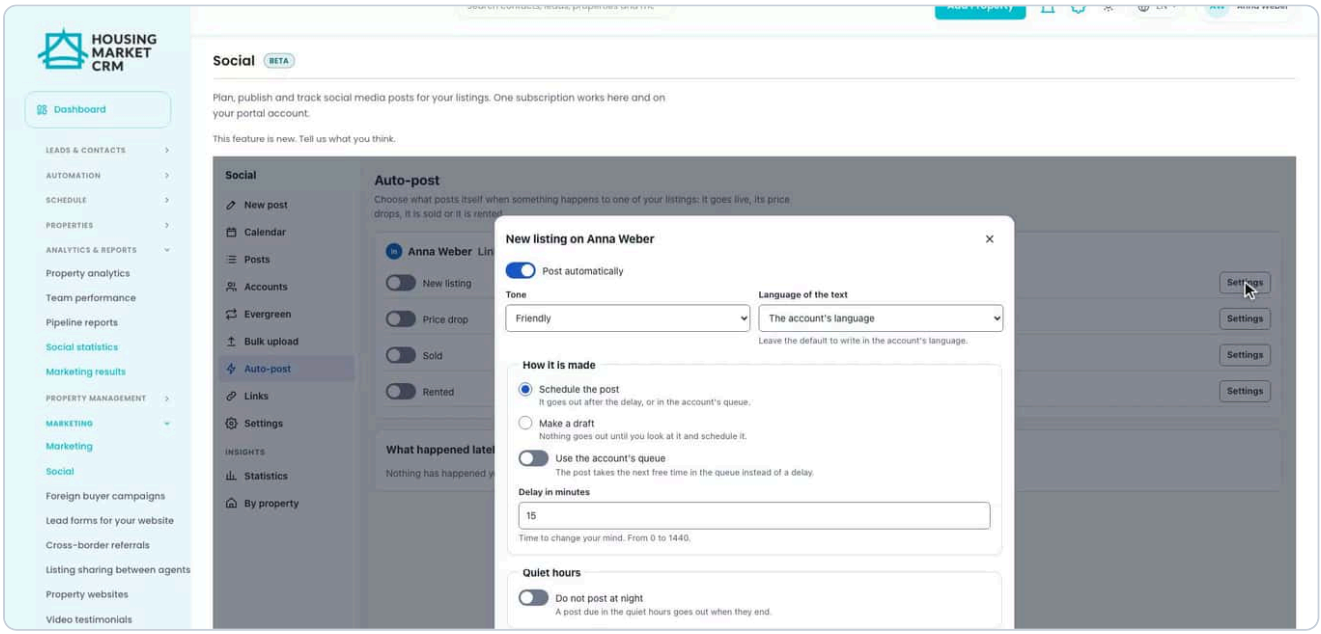


Figure 87.10 · Screen recorded 4 November 2026

11 **Post automatically** is on.

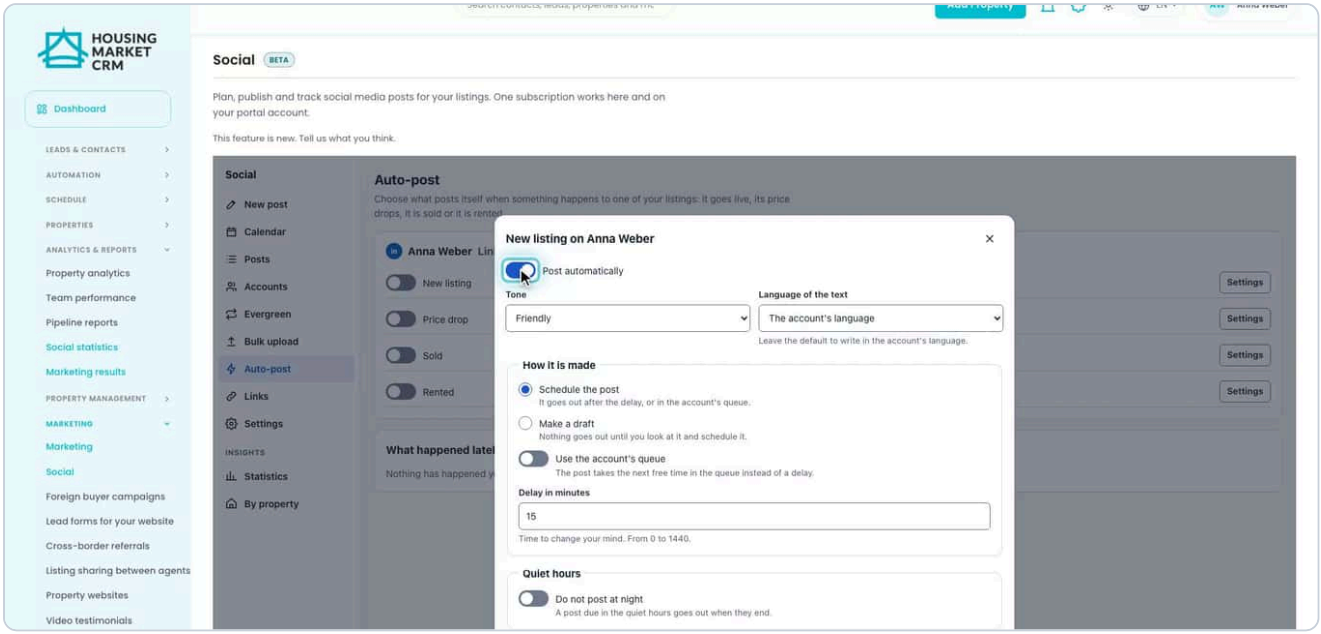


Figure 87.11 · Screen recorded 4 November 2026

12 Choose the **tone** of the text and its **language**.

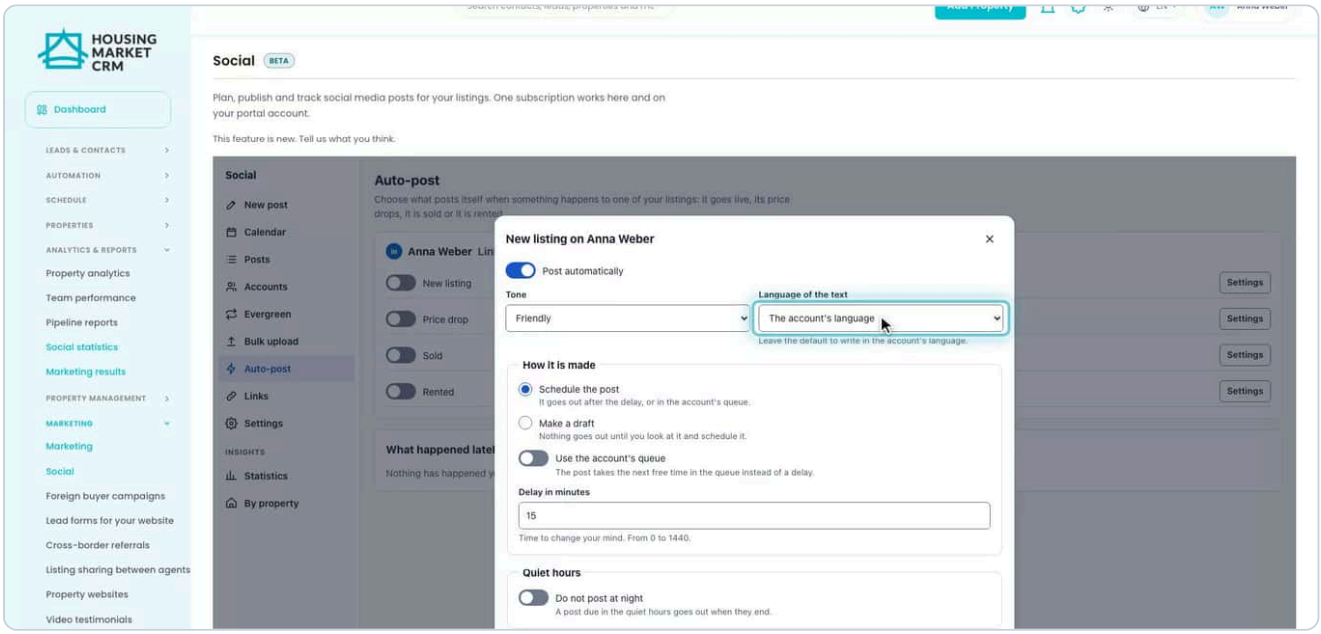


Figure 87.12 · Screen recorded 4 November 2026

13 Choose **Schedule the post**, or **Make a draft** to check it first.

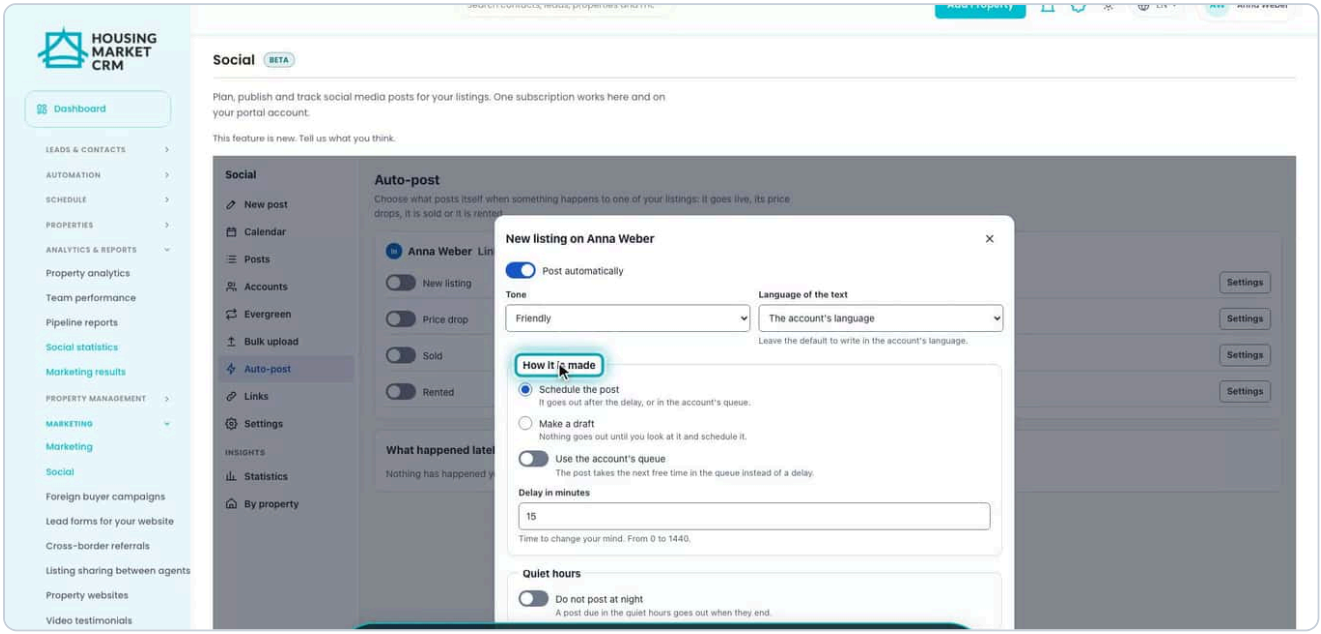


Figure 87.13 · Screen recorded 4 November 2026

14 The **delay** is your time to change your mind: 15 minutes to begin with.

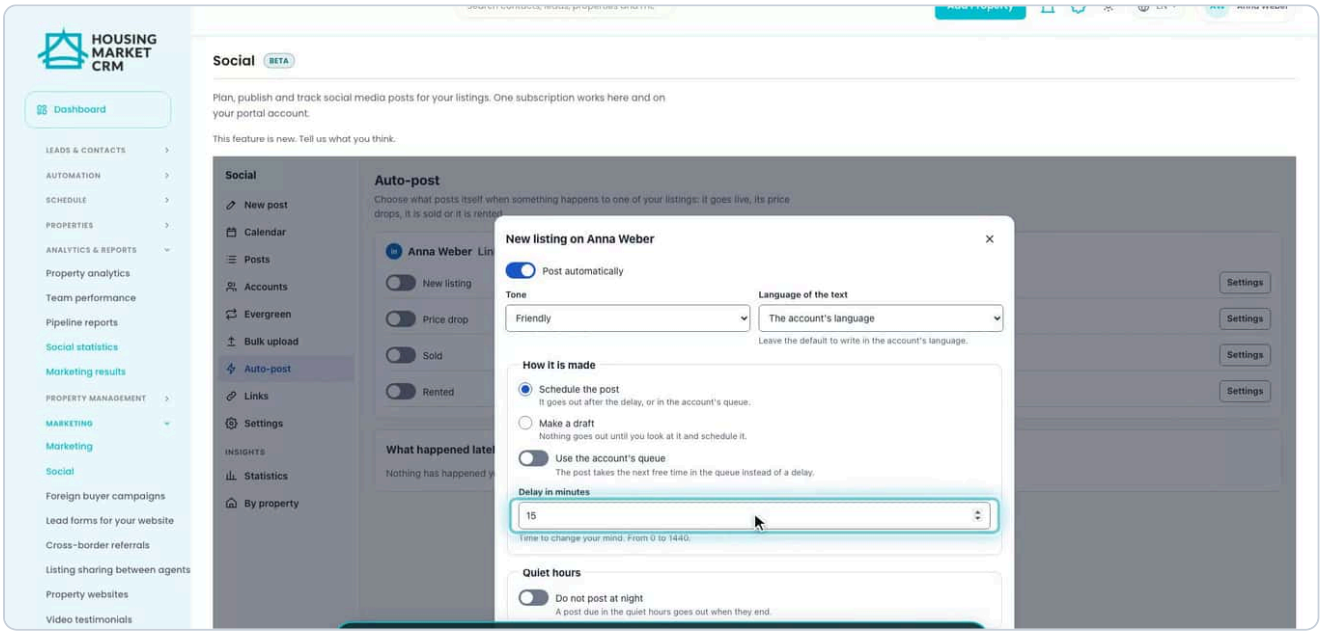


Figure 87.14 · Screen recorded 4 November 2026

15 **Quiet hours** hold a post until the night is over.

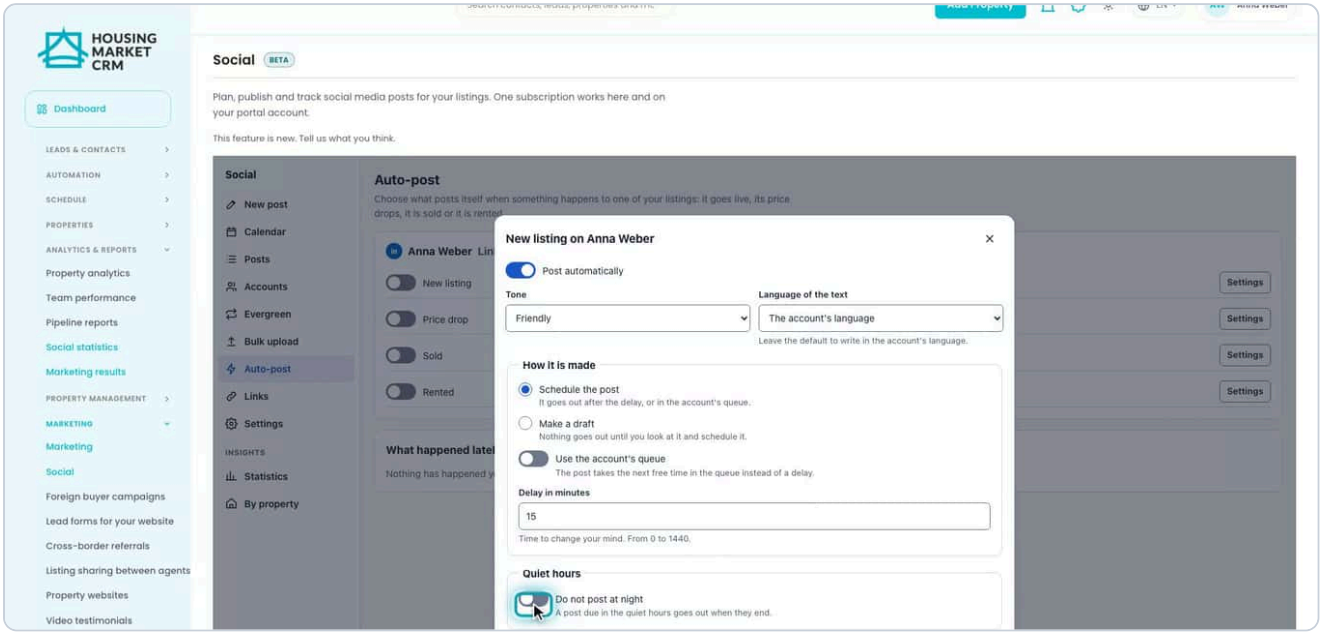


Figure 87.15 · Screen recorded 4 November 2026

16 Click **Save**.

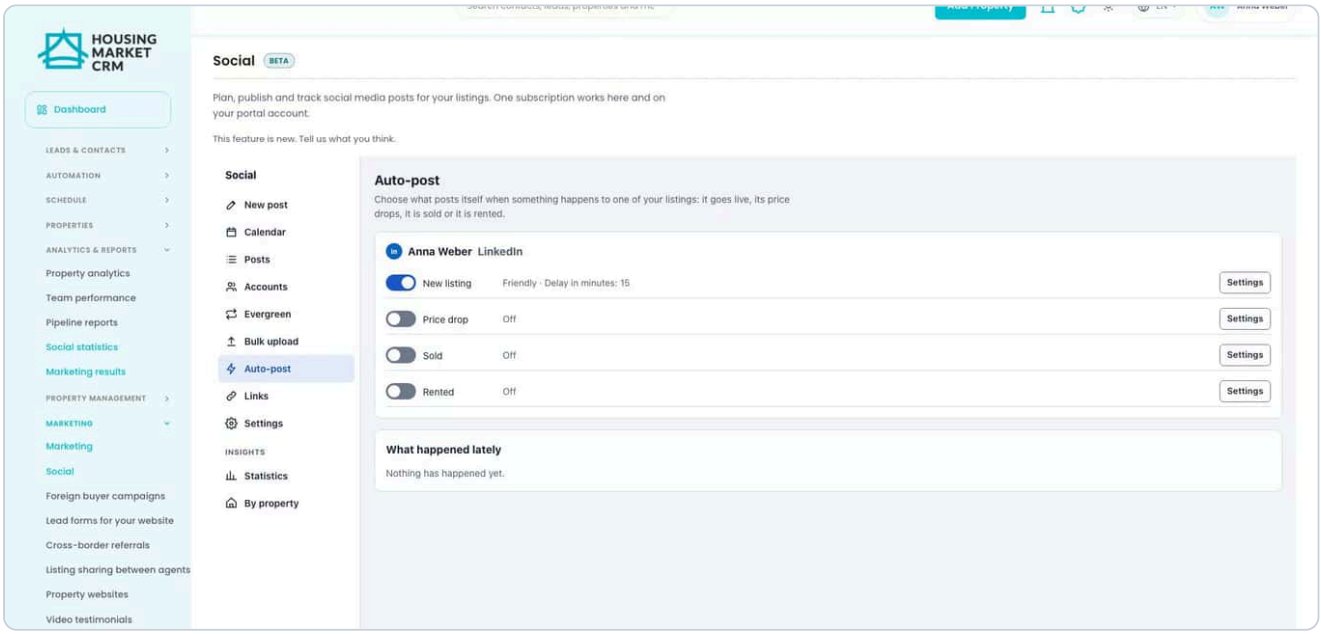


Figure 87.16 · Screen recorded 4 November 2026

17 New listing is now on.

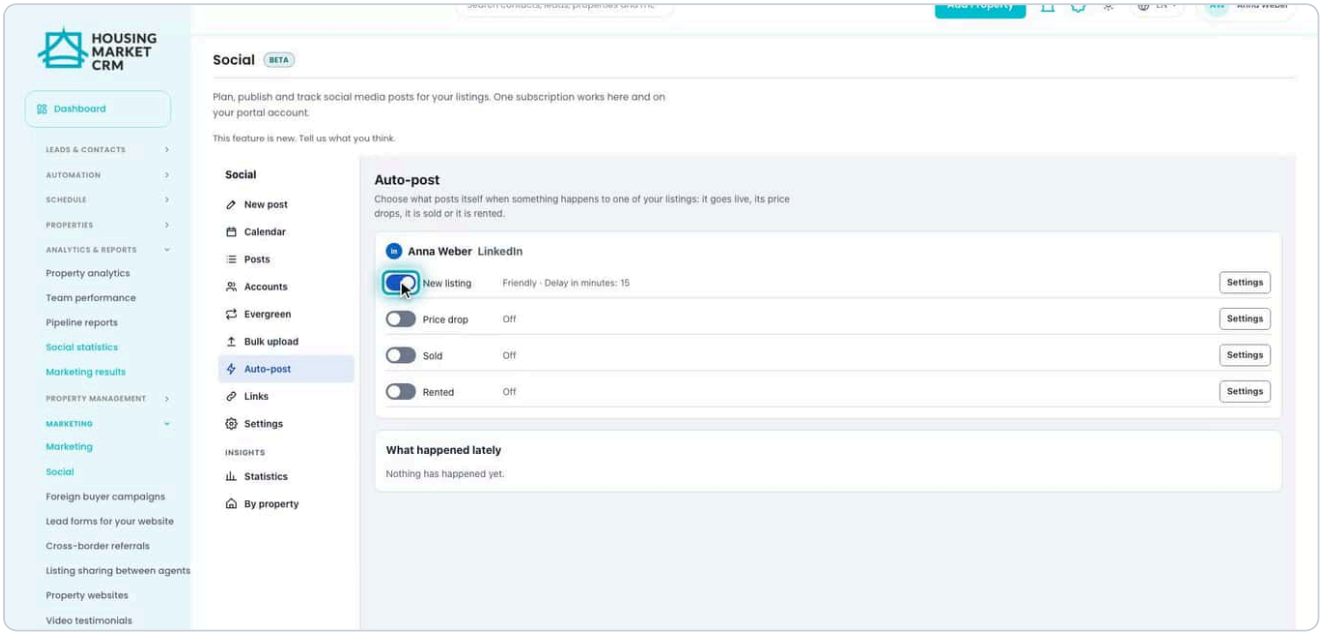


Figure 87.17 · Screen recorded 4 November 2026

18 Open Settings for Price drop.

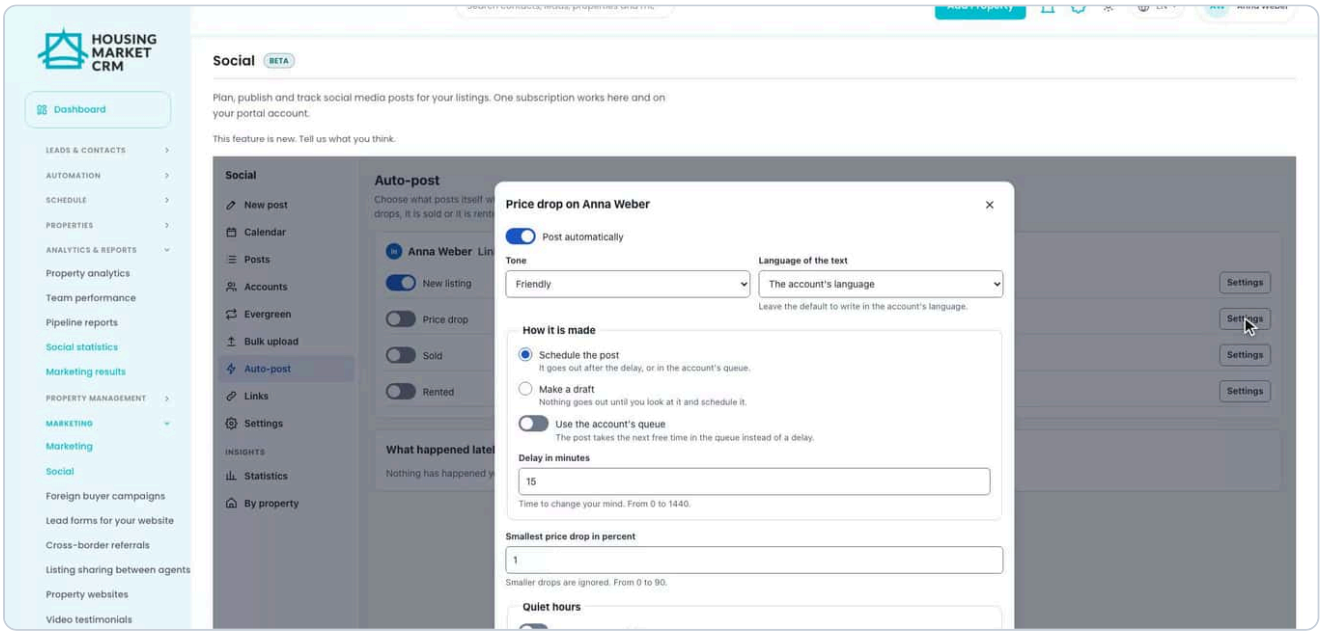


Figure 87.18 · Screen recorded 4 November 2026

19 Pick **Make a draft** to read every post before it goes out.

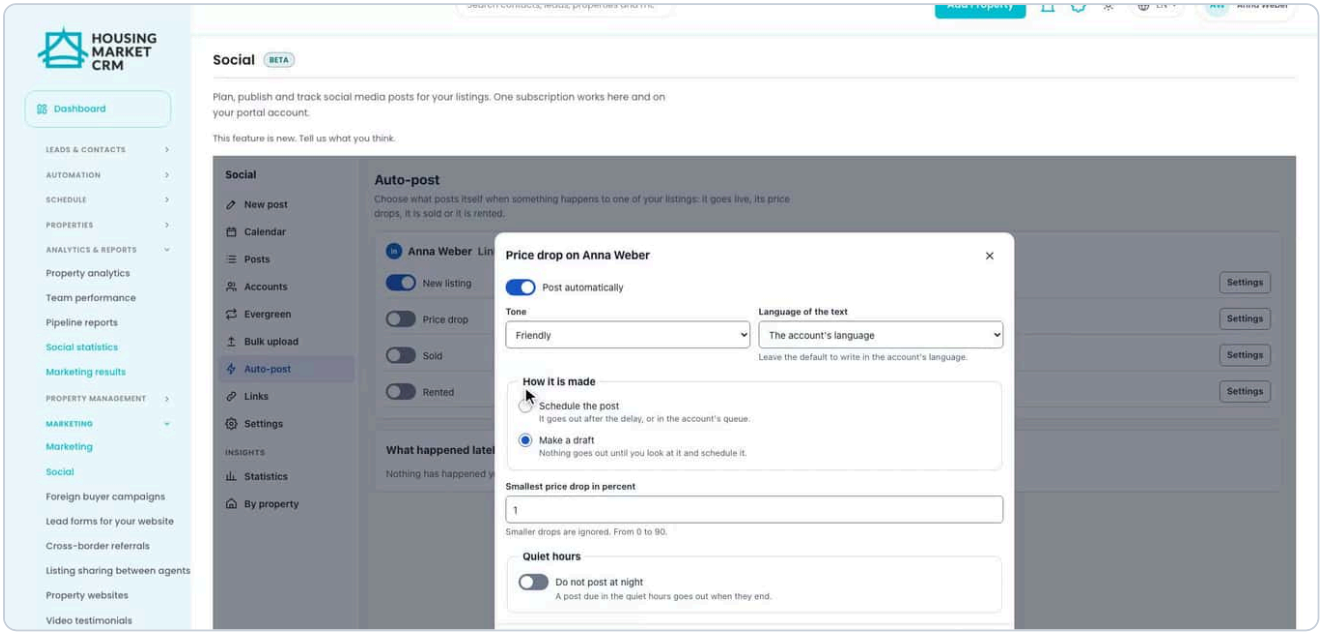


Figure 87.19 · Screen recorded 4 November 2026

20 Set the **smallest price drop** that is worth a post.

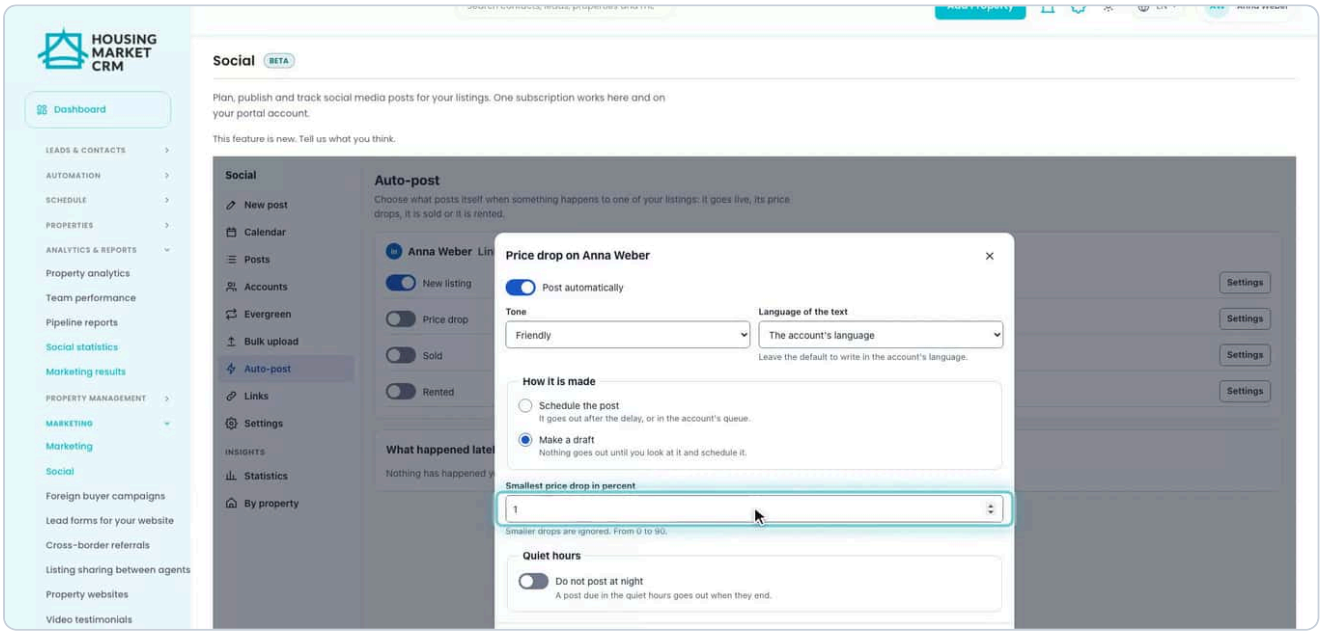


Figure 87.20 · Screen recorded 4 November 2026

21 Click **Save**.

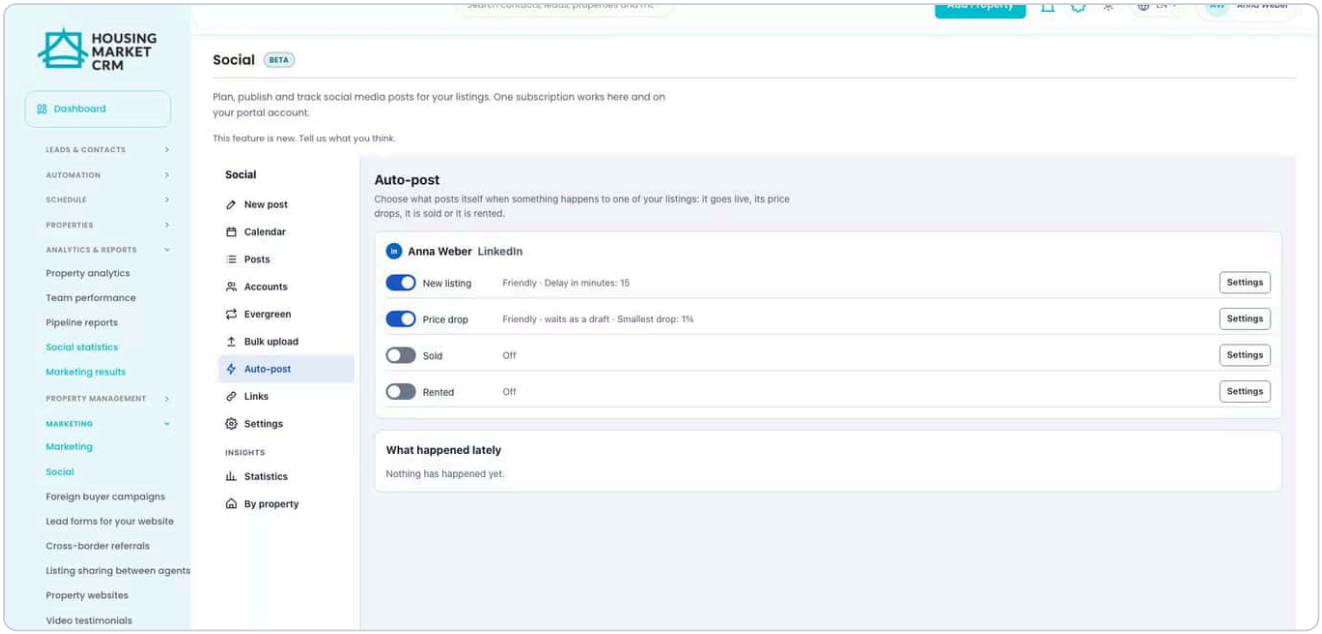


Figure 87.21 · Screen recorded 4 November 2026

22 Under **What happened lately**, you see each post Auto-post made for you.

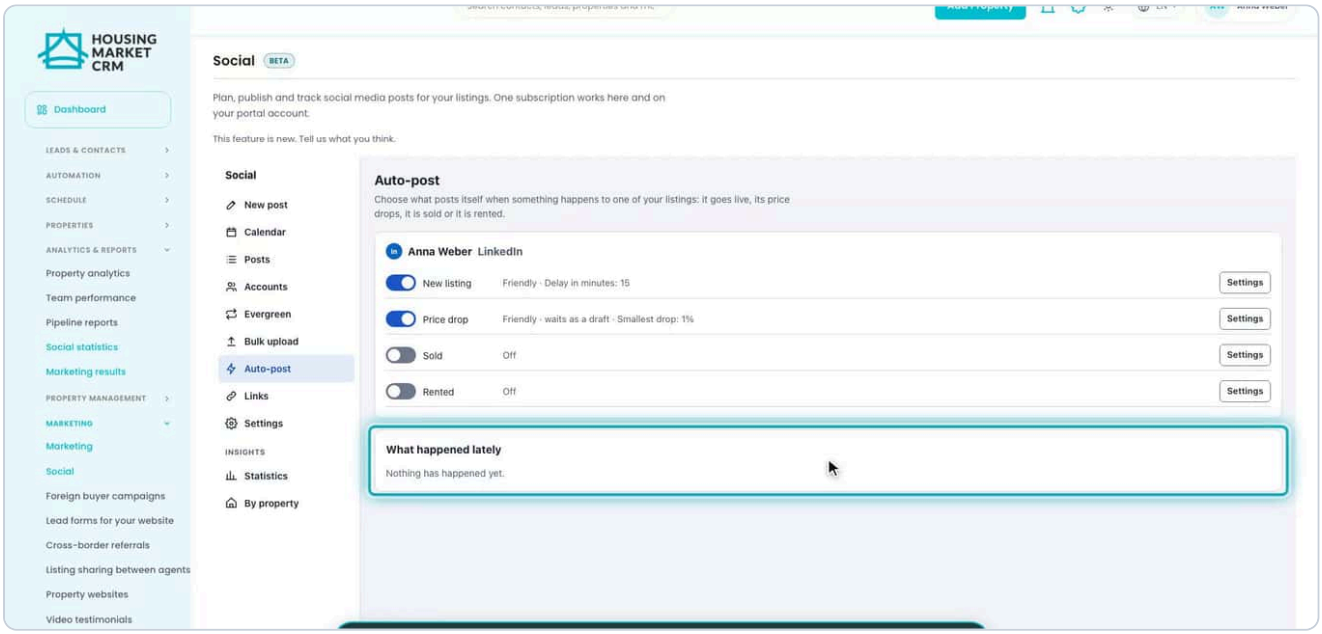


Figure 87.22 · Screen recorded 4 November 2026

23 You can switch an event off again at any time.

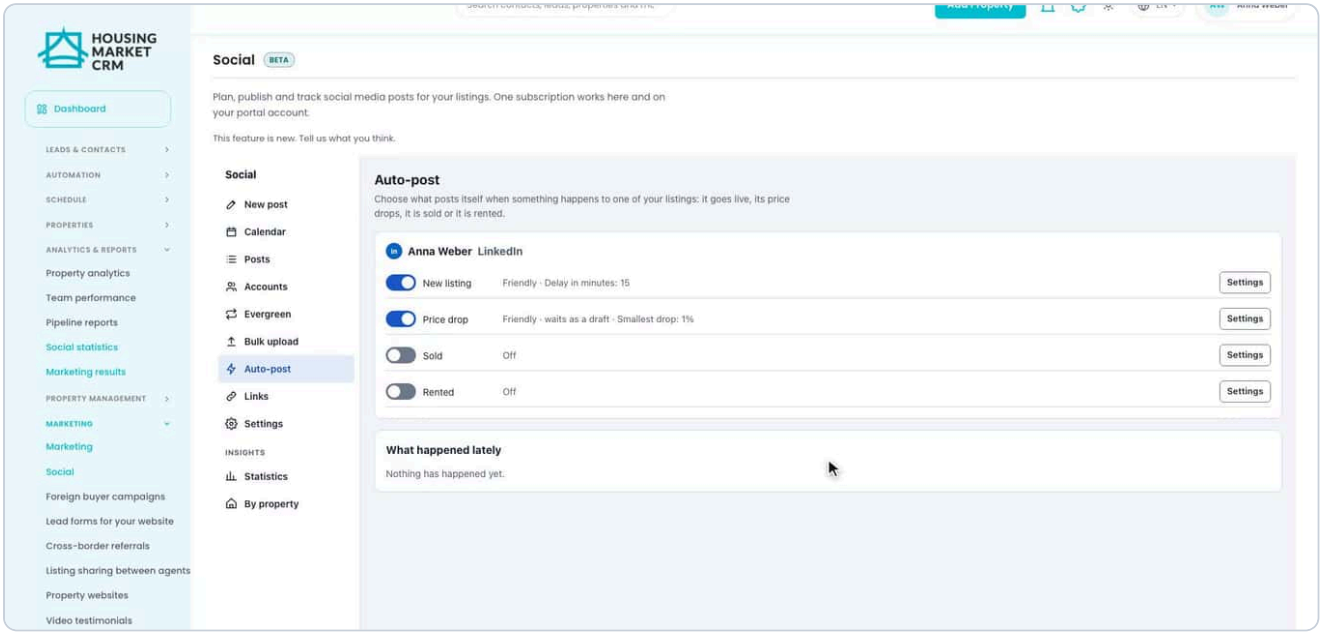


Figure 87.23 · Screen recorded 4 November 2026

88 CHAPTER 88

Track clicks on every link

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

Each post link is a short link that counts clicks and visits to your listing, and an enquiry made soon after is credited to the post. In the CRM it arrives as a lead with the source Social and the network.

When a post links to one of your listings, Social gives each network its own short link that opens the listing on its portal. That is how you can see which network brought people.

Clicks, visits to the listing and enquiries are counted from your own short links. Link previews and robots are not counted.

An enquiry is credited to a post when it is made within 30 days of a click on the same device. Someone who clicks on a phone and enquires later on a computer appears as an ordinary enquiry.

In Housing Market CRM the lead shows the source Social and the network, for example Social: LinkedIn. That is true on every CRM plan, Free included.

From the Help Center: **How does Housing Market Social track clicks and enquiries?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

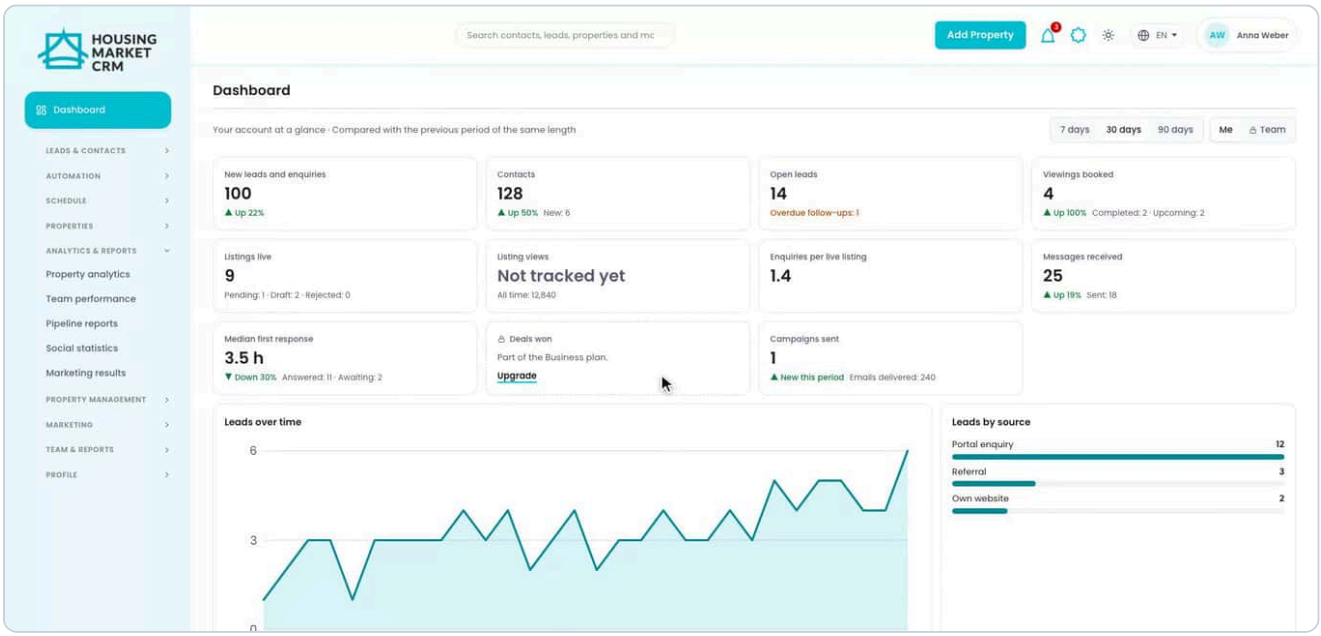


Figure 88.1 · Screen recorded 4 November 2026

2 Open **Marketing** in the left menu.

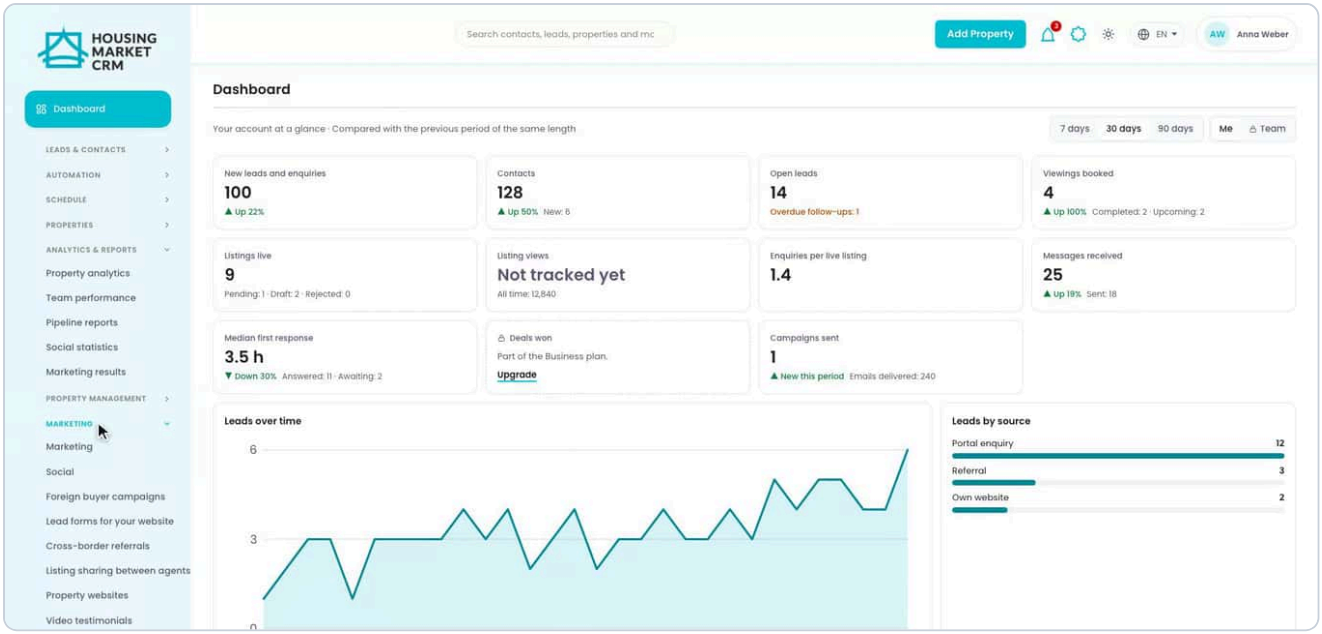


Figure 88.2 · Screen recorded 4 November 2026

3 Click **Social**.

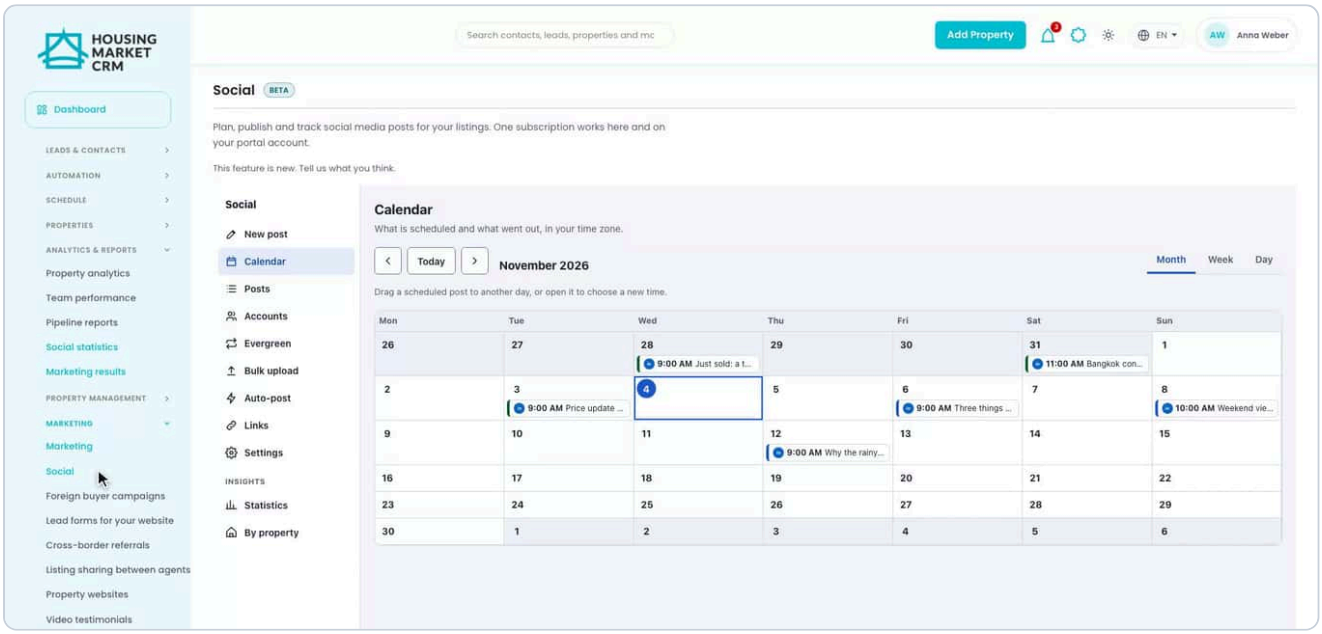


Figure 88.3 · Screen recorded 4 November 2026

4 Click **Links**.

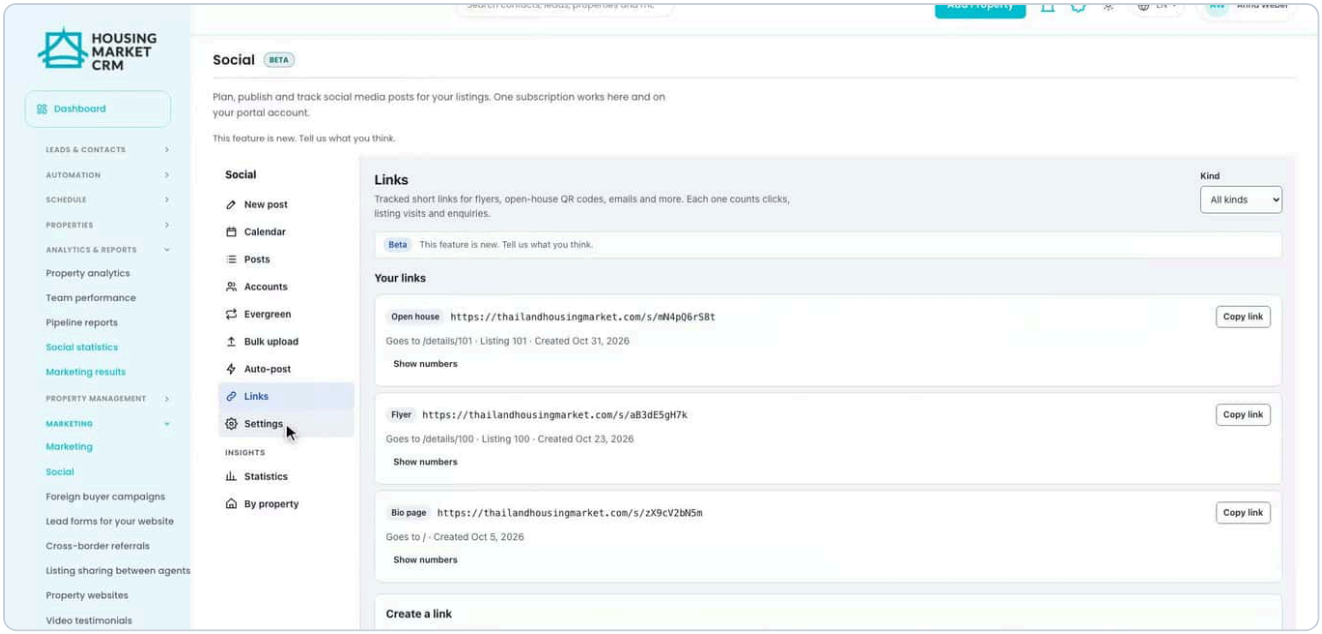


Figure 88.4 · Screen recorded 4 November 2026

5 Every **tracked short link** you made is listed here.

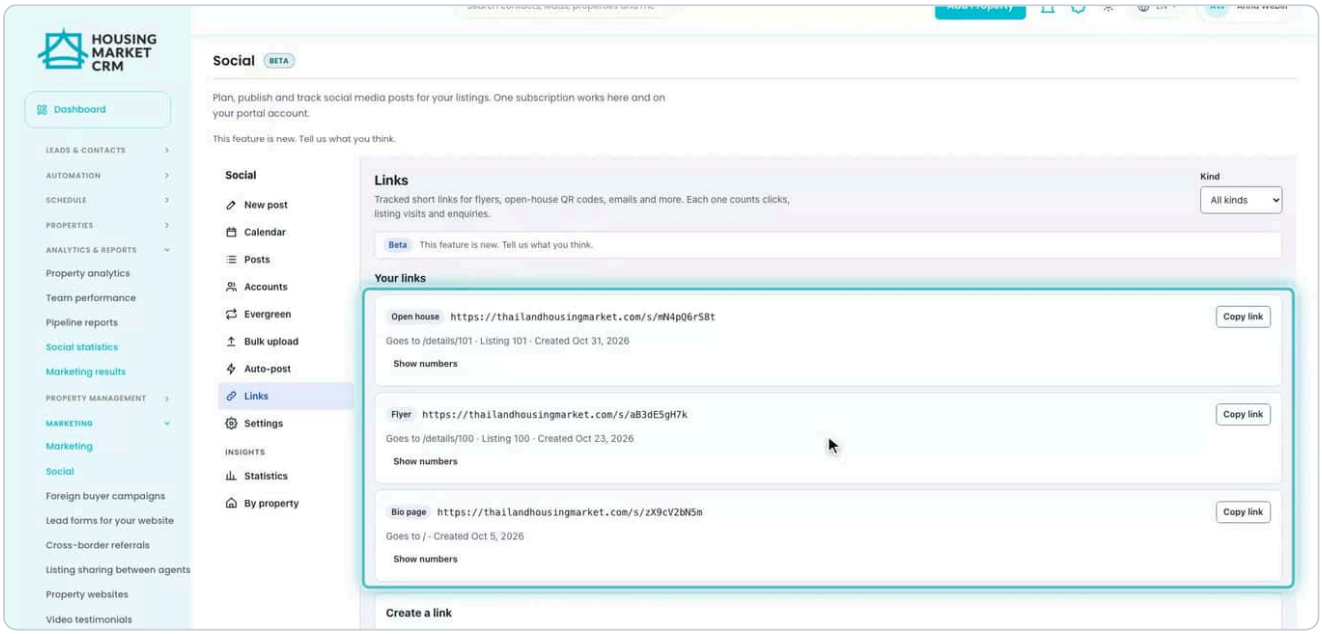


Figure 88.5 · Screen recorded 4 November 2026

6 This **open house** link opens one listing.

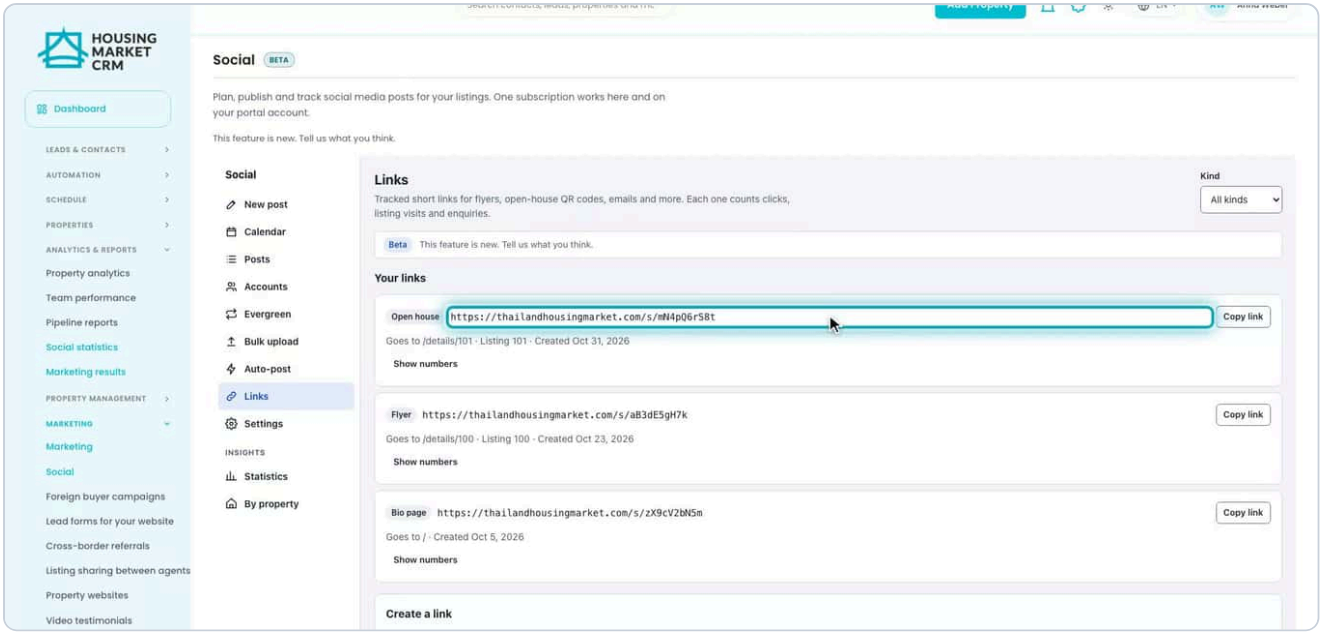


Figure 88.6 · Screen recorded 4 November 2026

7 Click **Show numbers**.

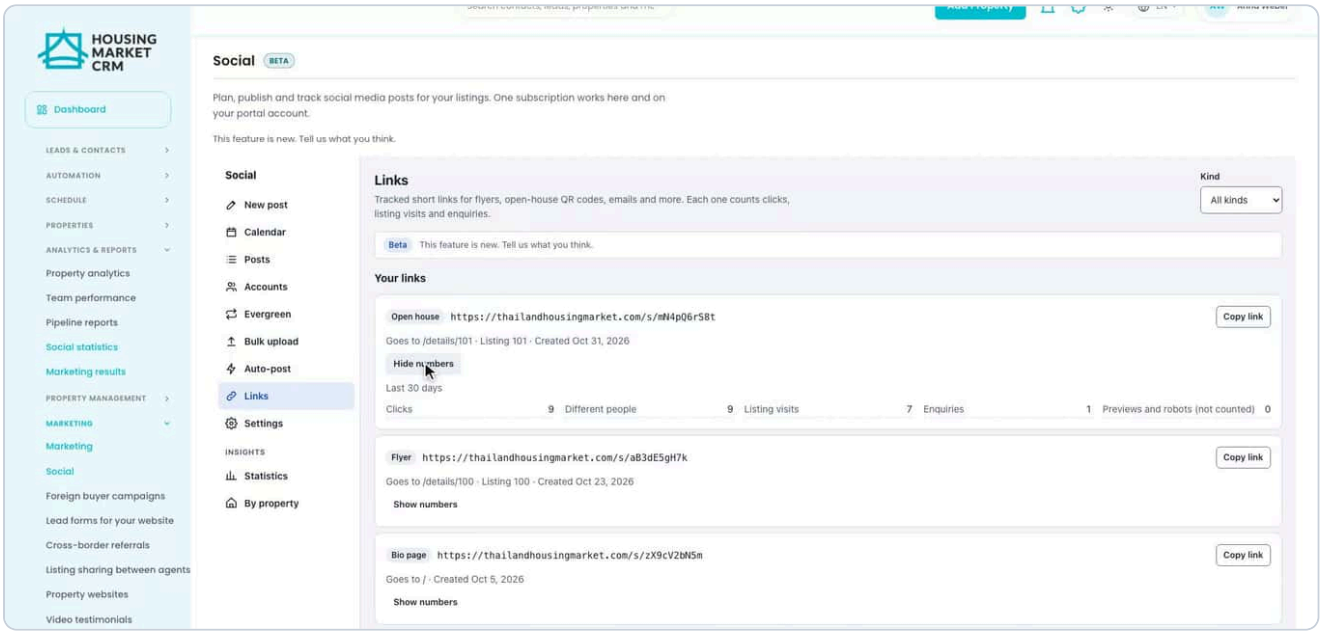


Figure 88.7 · Screen recorded 4 November 2026

8 Clicks, listing visits and enquiries for this one link.

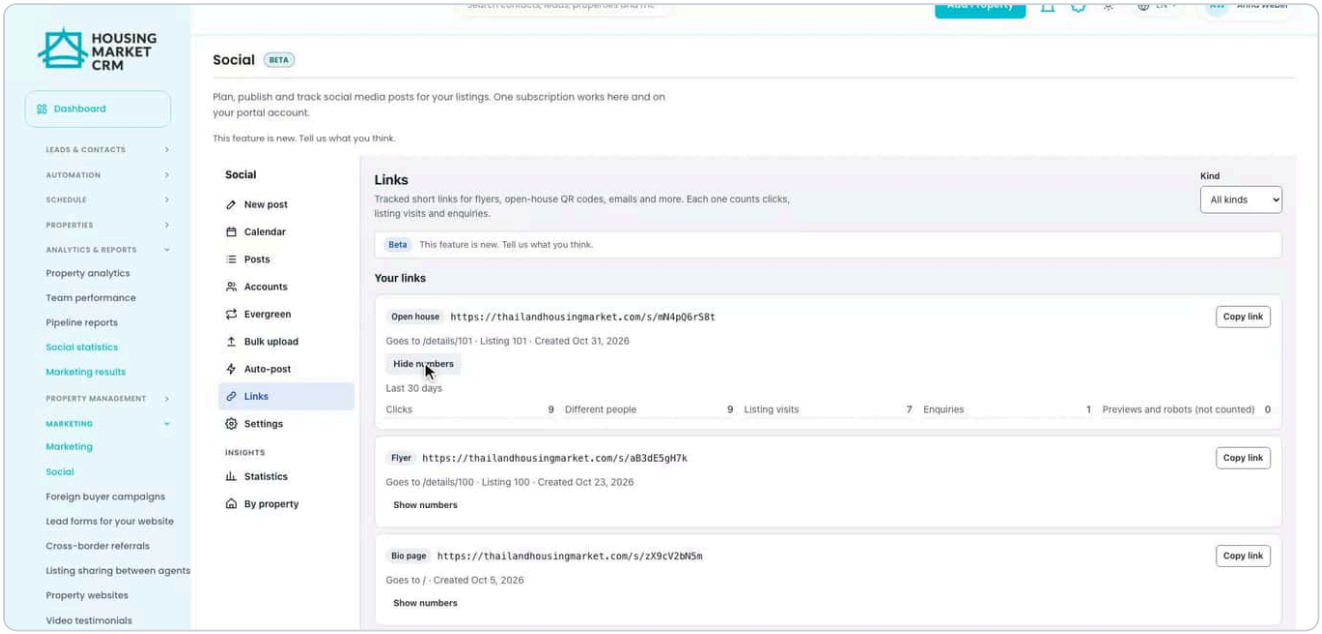


Figure 88.8 · Screen recorded 4 November 2026

9 Filter by kind: here, the flyers.

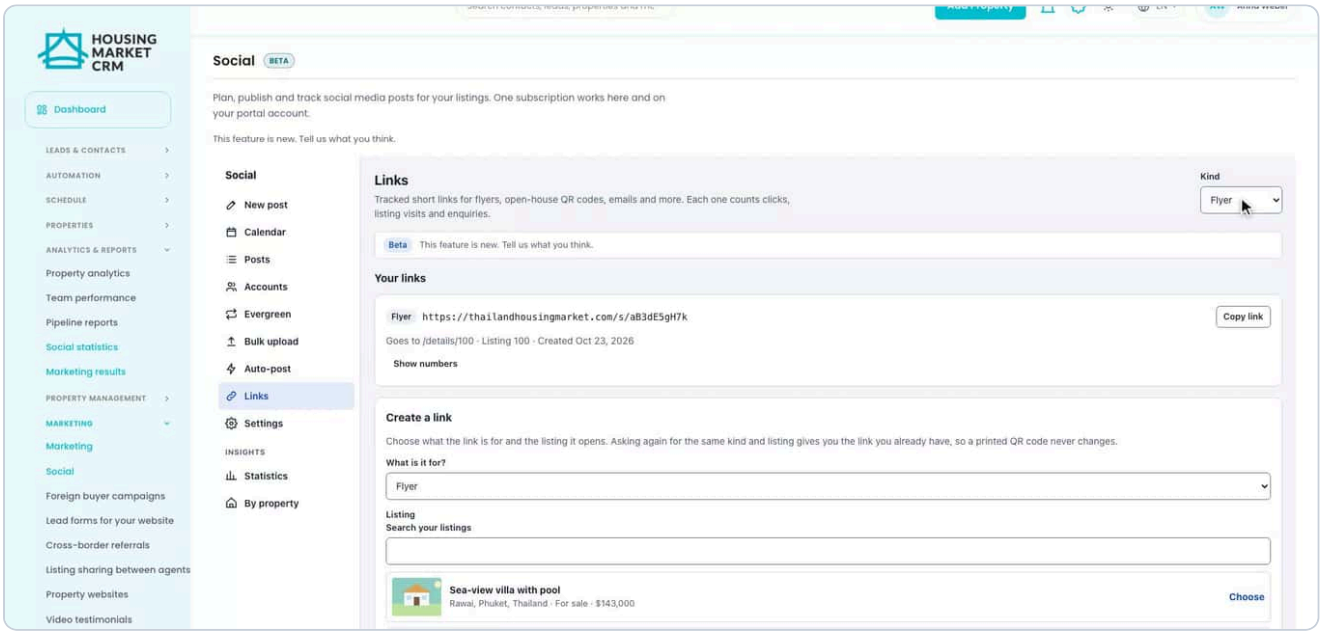


Figure 88.9 · Screen recorded 4 November 2026

10 Or show **all kinds** again.

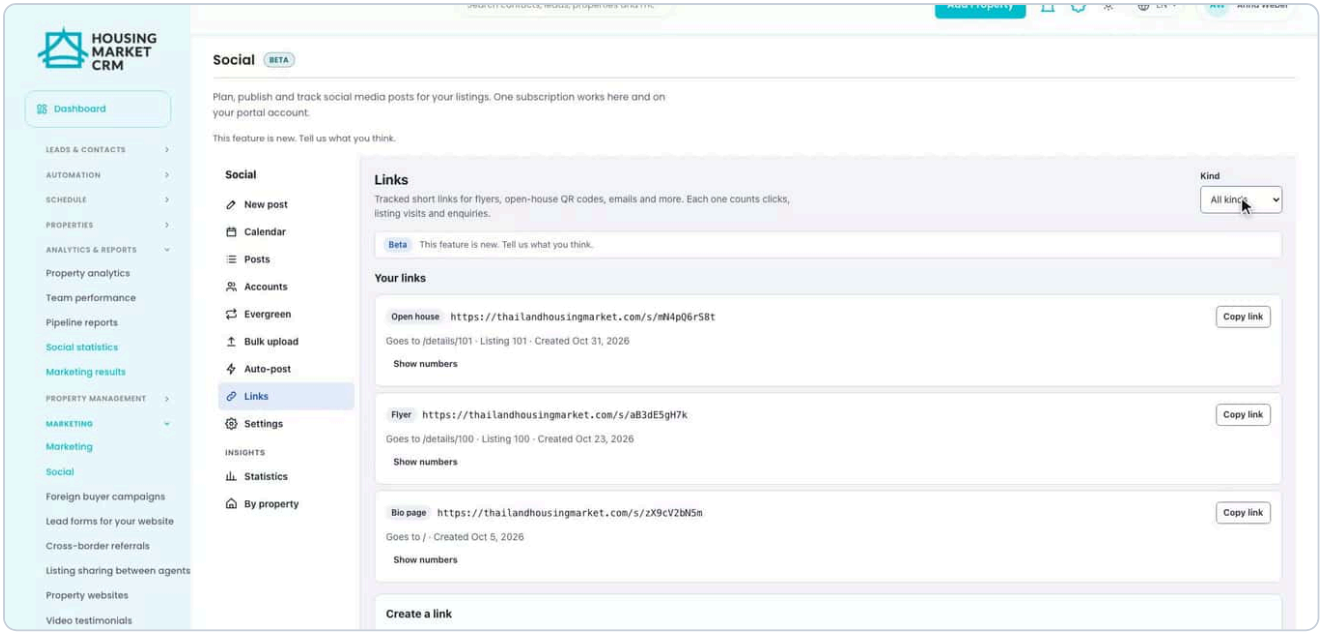


Figure 88.10 · Screen recorded 4 November 2026

11 To make a link, choose **what it is for**.

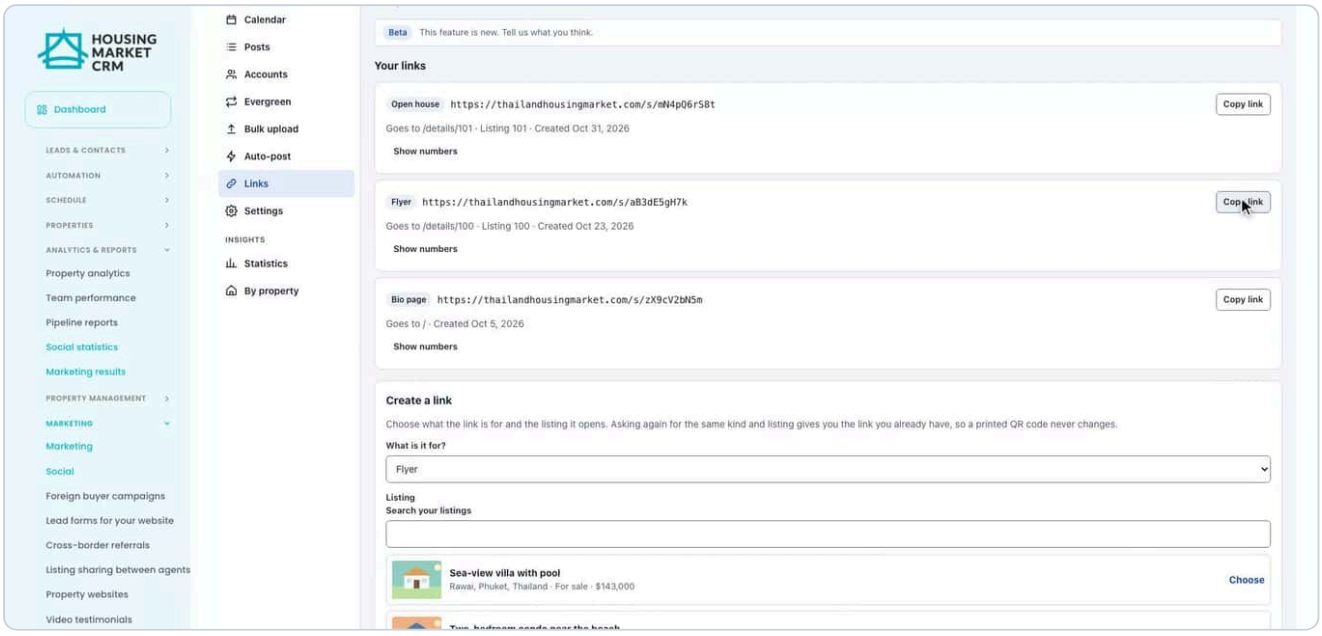


Figure 88.11 · Screen recorded 4 November 2026

12 Pick **Email**, for a link in a message to a client.

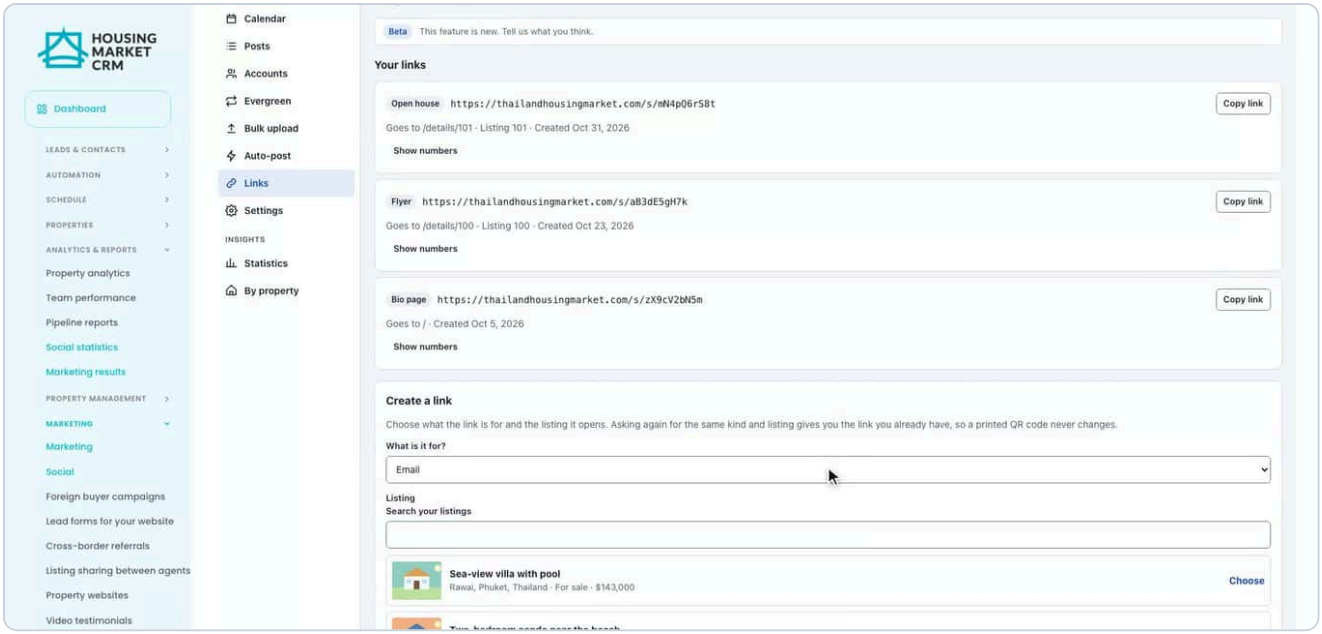


Figure 88.12 · Screen recorded 4 November 2026

13 Search for the **listing** the link opens.

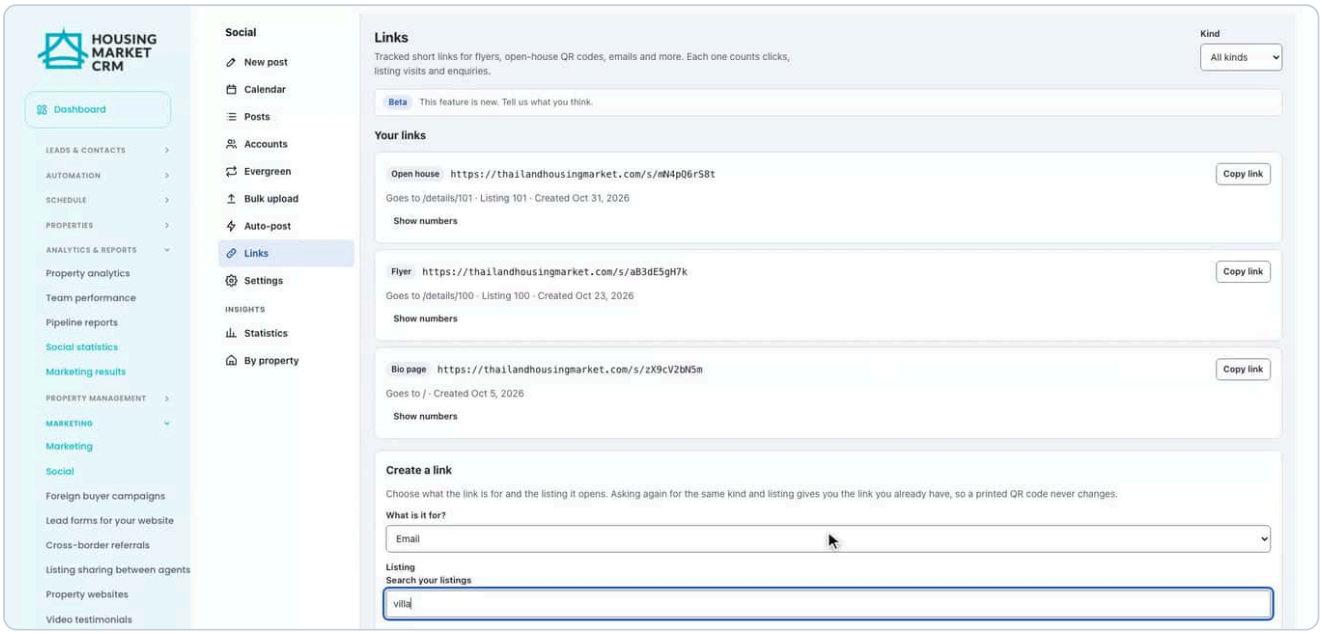


Figure 88.13 · Screen recorded 4 November 2026

14 Choose the **sea-view villa**.

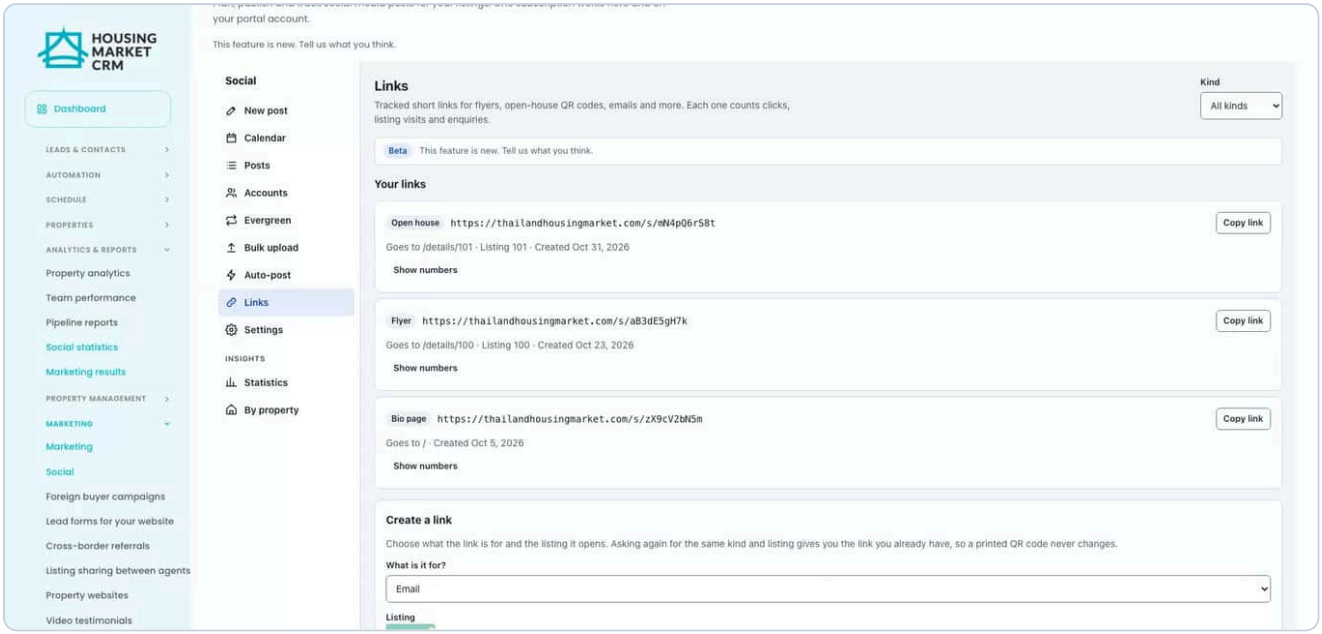


Figure 88.14 · Screen recorded 4 November 2026

15 Click **Create link**.

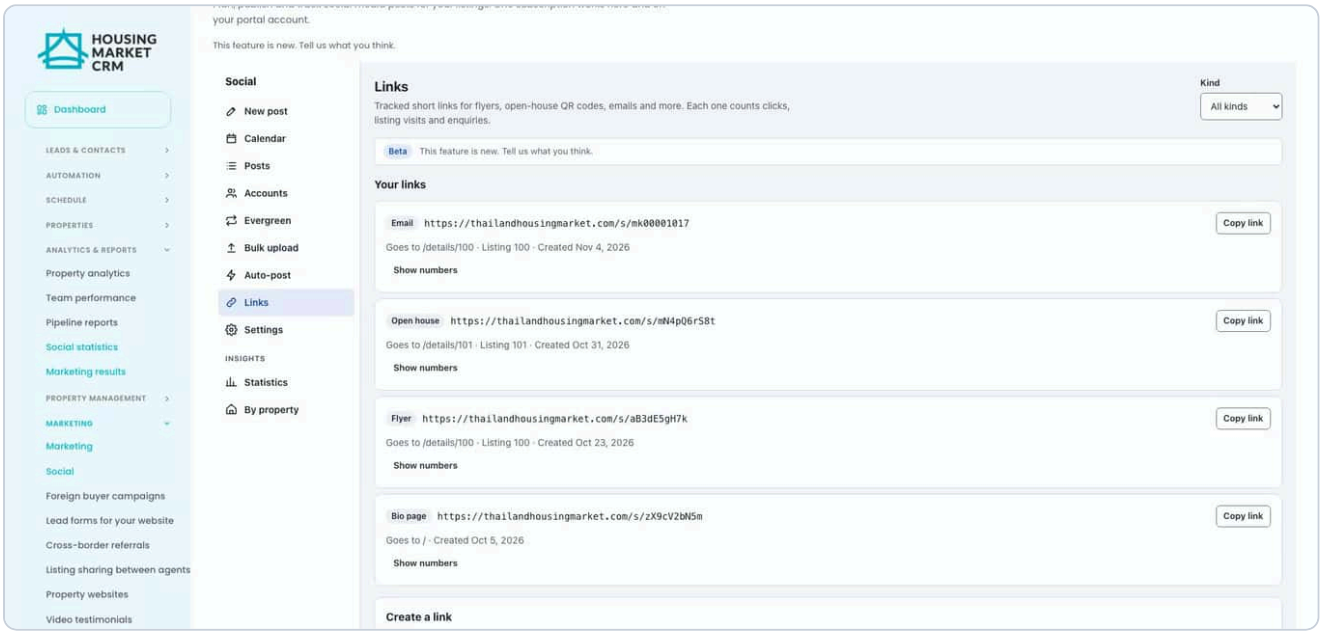


Figure 88.15 · Screen recorded 4 November 2026

16 The new link joins your list, ready to copy.

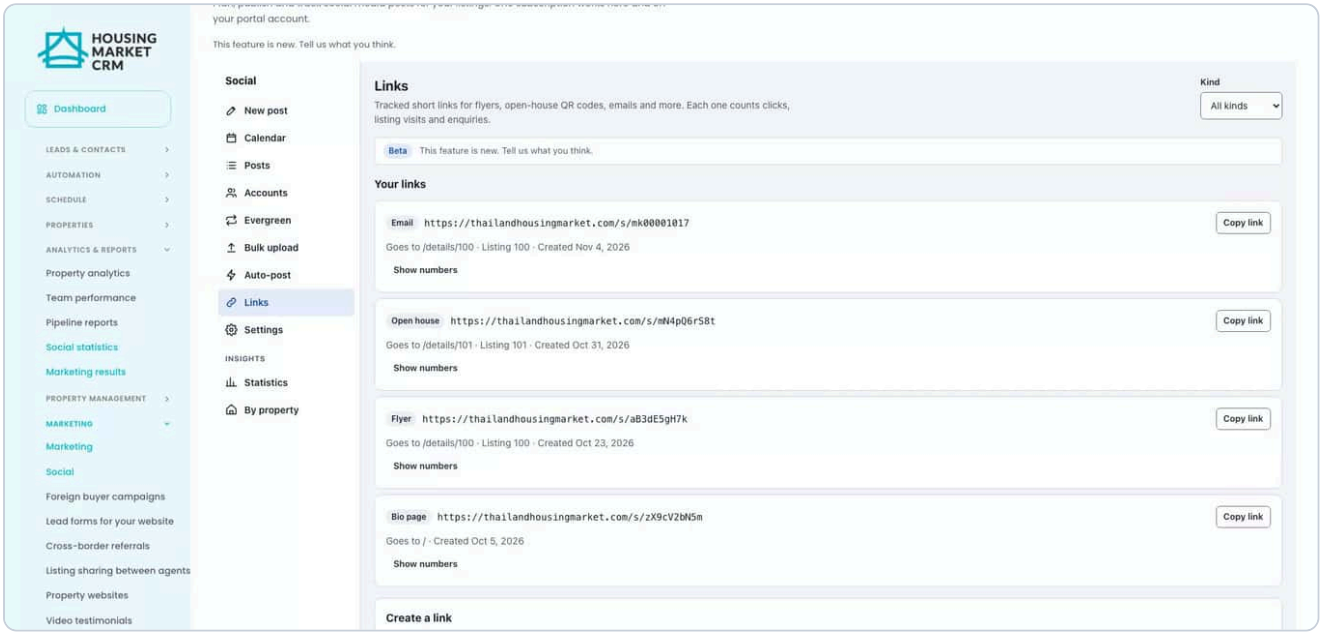


Figure 88.16 · Screen recorded 4 November 2026

17 Ask again for the **same kind** and **listing**.

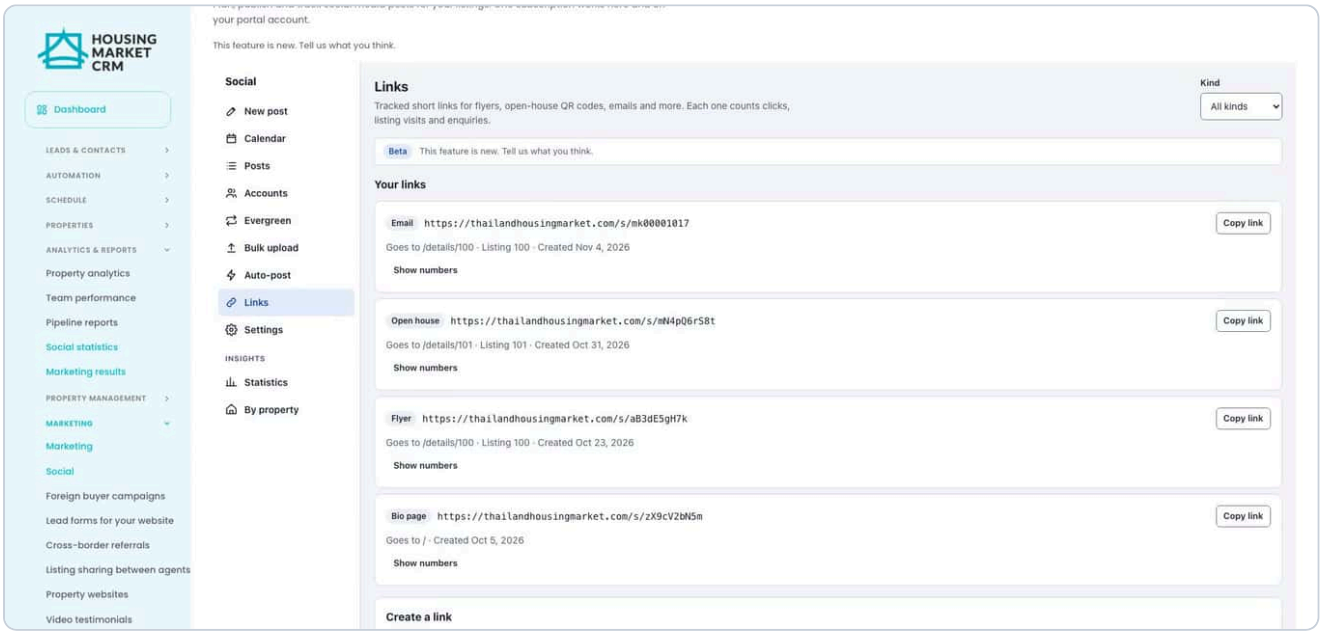


Figure 88.17 · Screen recorded 4 November 2026

18 Click **Create link** again.

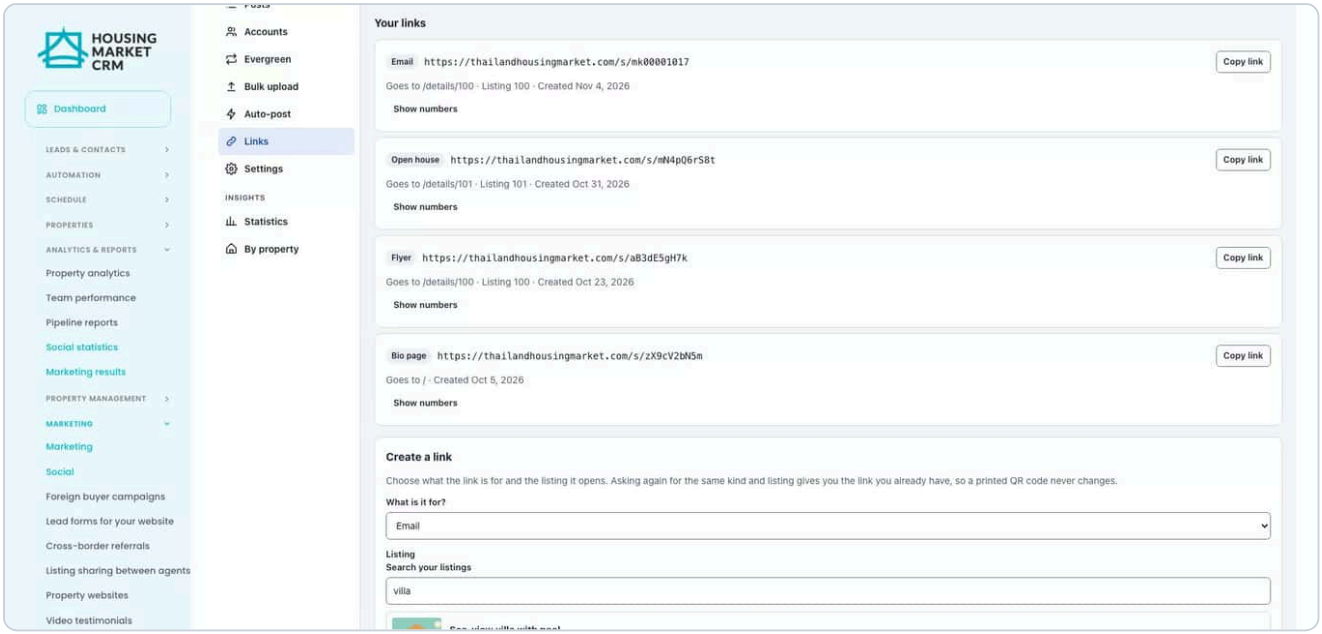


Figure 88.18 · Screen recorded 4 November 2026

19 and you get **the link you already have**, so a printed **QR code never changes**.

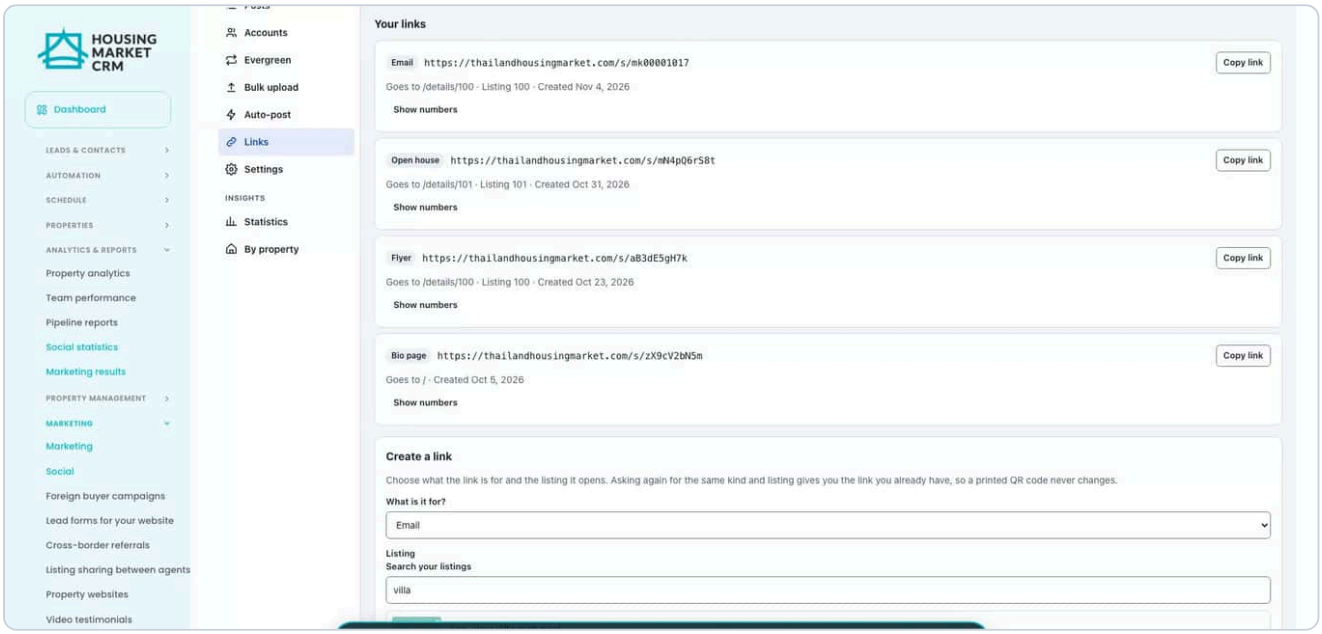


Figure 88.19 · Screen recorded 4 November 2026

89 CHAPTER 89

Statistics by property

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

Posts, link clicks, listing visits and enquiries for the last 7, 30 or 90 days, by network and by post, with the numbers each network shares and a CSV or PDF report.

Statistics opens with a summary for the period you choose, the last 7, 30 or 90 days: posts, link clicks, listing visits and enquiries. Clicks, visits and enquiries come from your own short links; link previews and robots are not counted.

Below it you see the numbers by network, your top posts ranked by engagement, link clicks or enquiries, each post with its own numbers, and for each profile how its followers changed over the period.

Reach, impressions, likes, comments and shares come from each network, and each network decides what it shares. Where a network does not provide a number, Statistics says so instead of showing zero, and numbers for posts you published yourself on a network are not available.

You can download the posts of a period with their numbers as CSV or PDF. For some languages the PDF is in English; the CSV has every language. A period with more posts than a report holds must be shortened.

From the Help Center: **What do Housing Market Social statistics show?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

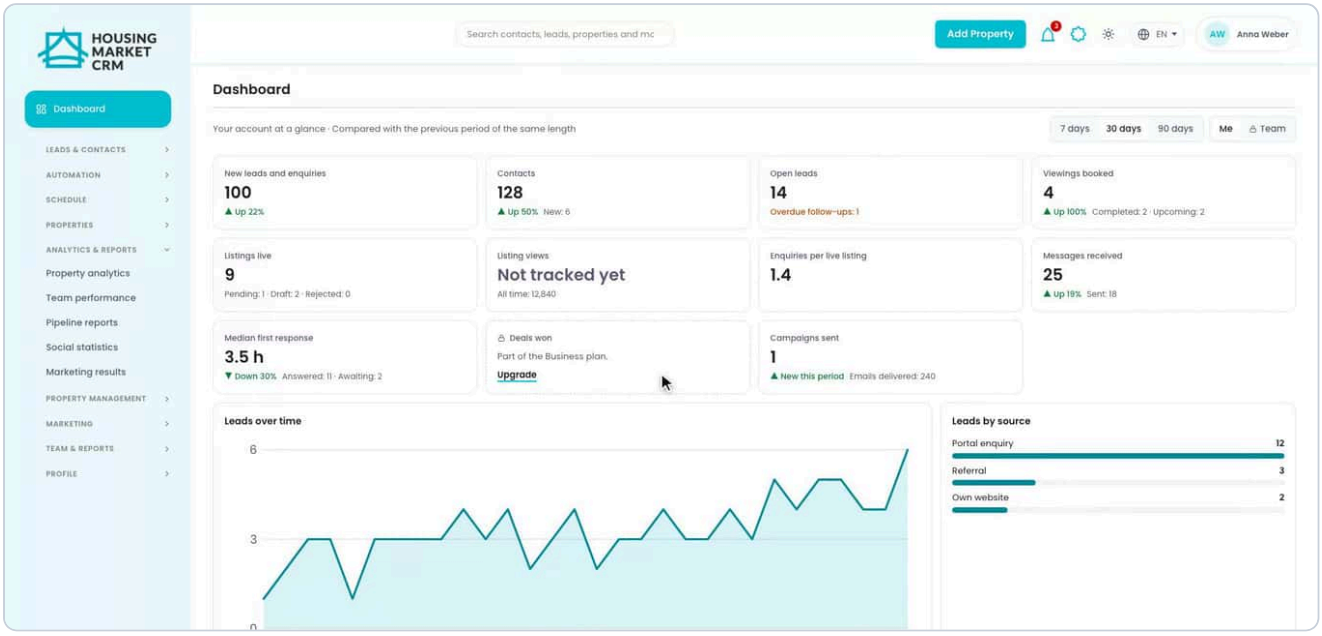


Figure 89.1 · Screen recorded 4 November 2026

2 Open **Marketing** in the left menu.

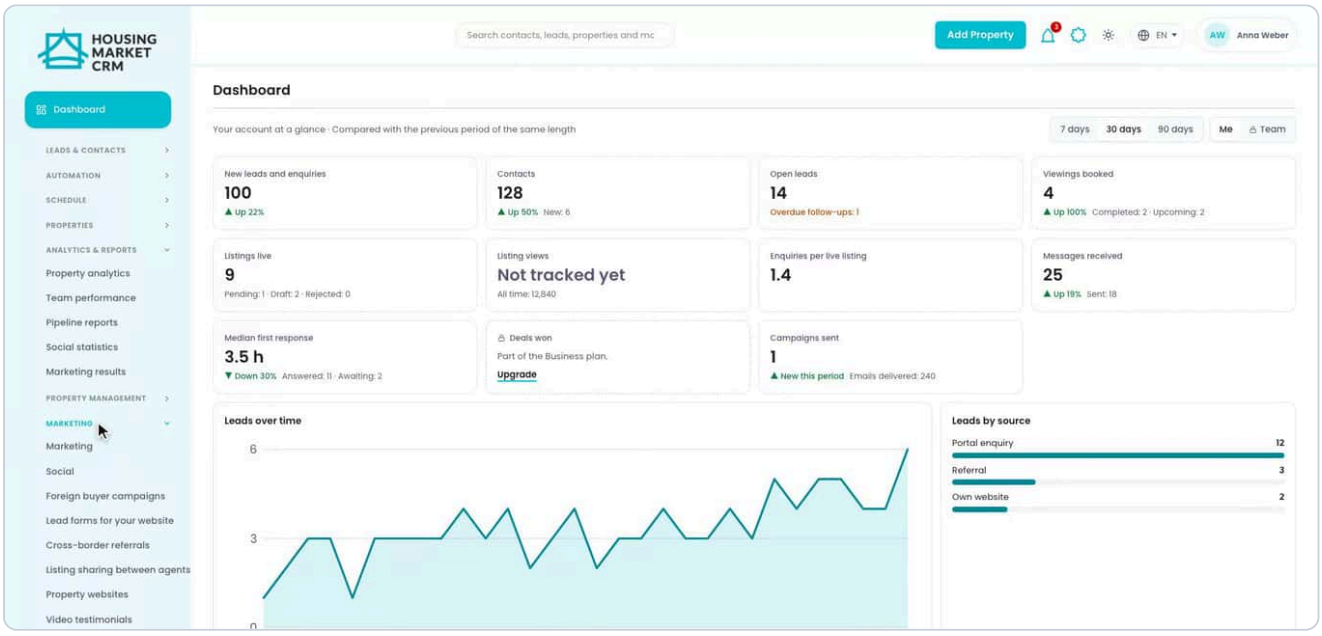


Figure 89.2 · Screen recorded 4 November 2026

3 Click **Social**.

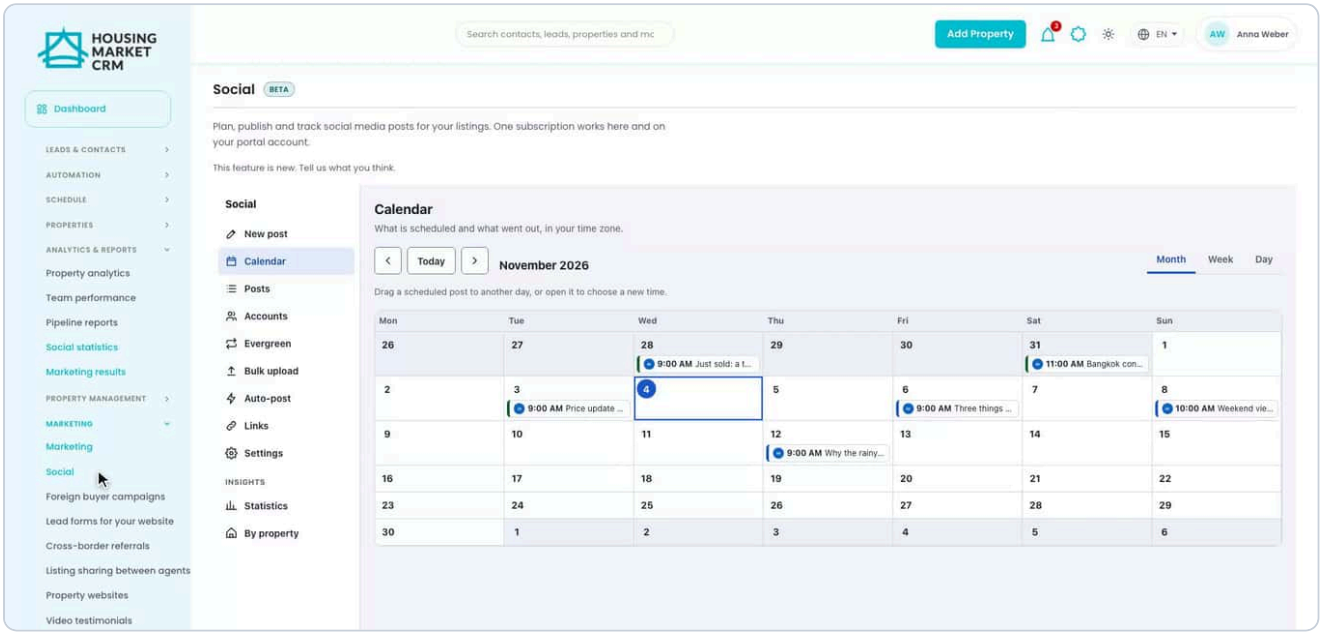


Figure 89.3 · Screen recorded 4 November 2026

4 Under **Insights**, click **By property**.

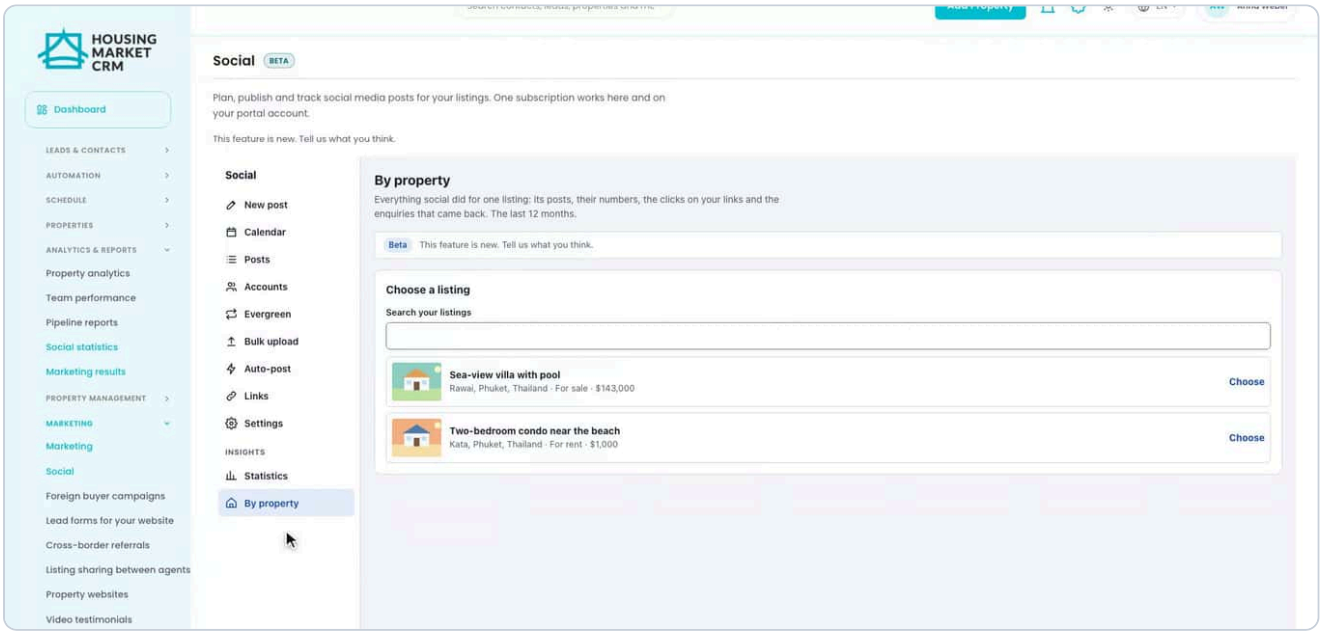


Figure 89.4 · Screen recorded 4 November 2026

5 Choose the **listing** you want to look at.

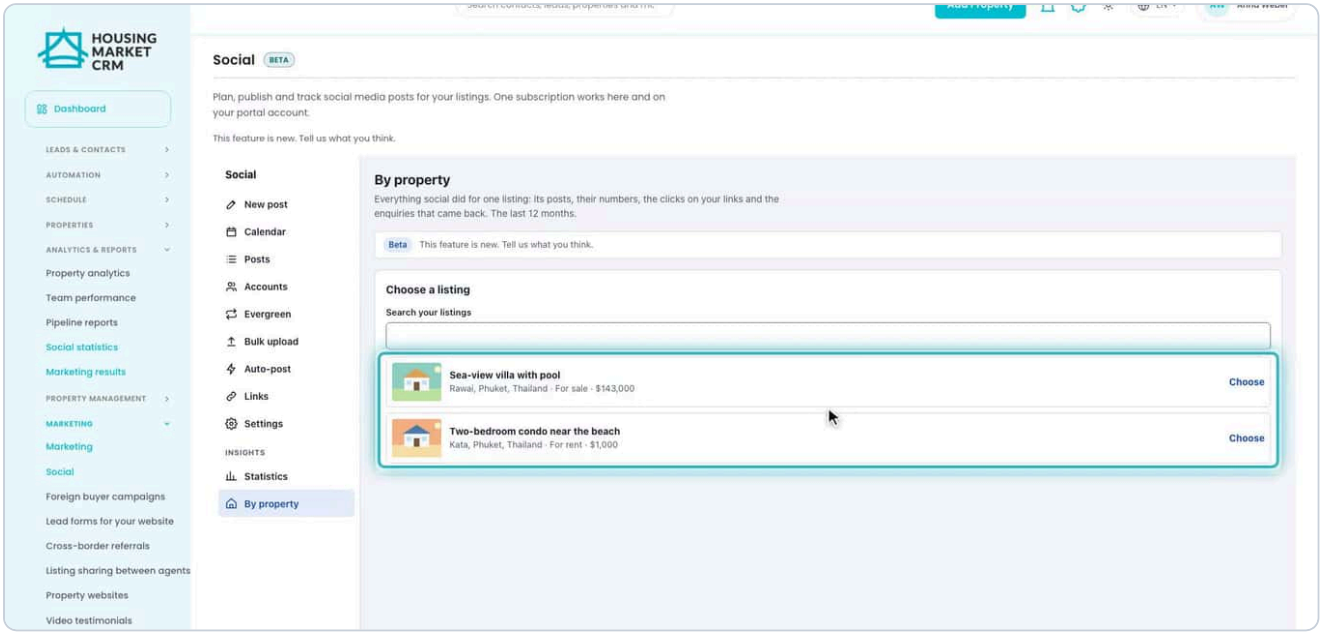


Figure 89.5 · Screen recorded 4 November 2026

6 Click the **sea-view villa**.

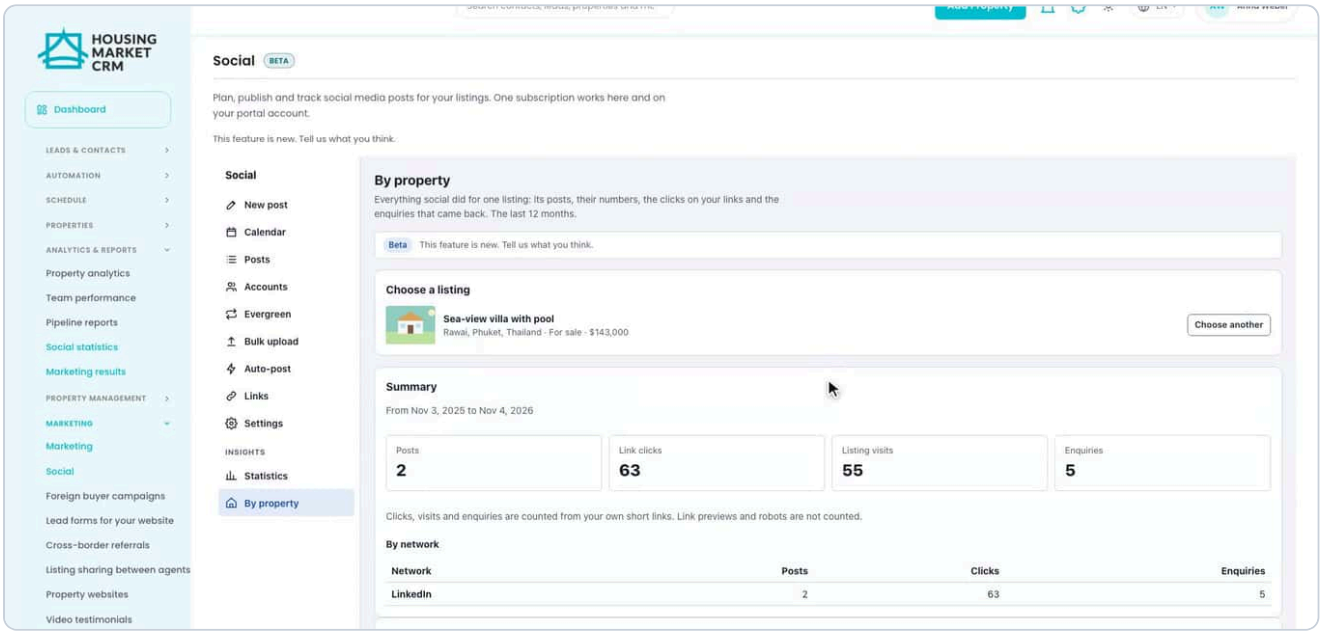


Figure 89.6 · Screen recorded 4 November 2026

7 The last **twelve months**: **posts**, **link clicks**, **listing visits** and **enquiries**.

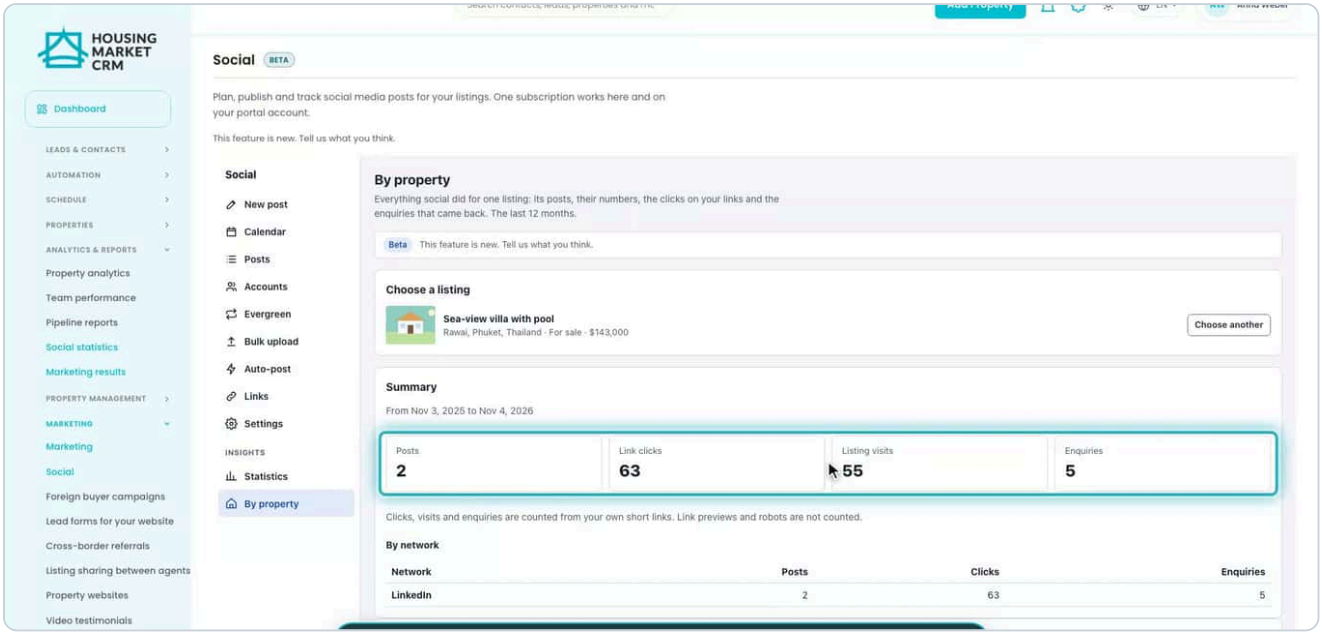


Figure 89.7 · Screen recorded 4 November 2026

8 They are counted from **your own short links**.

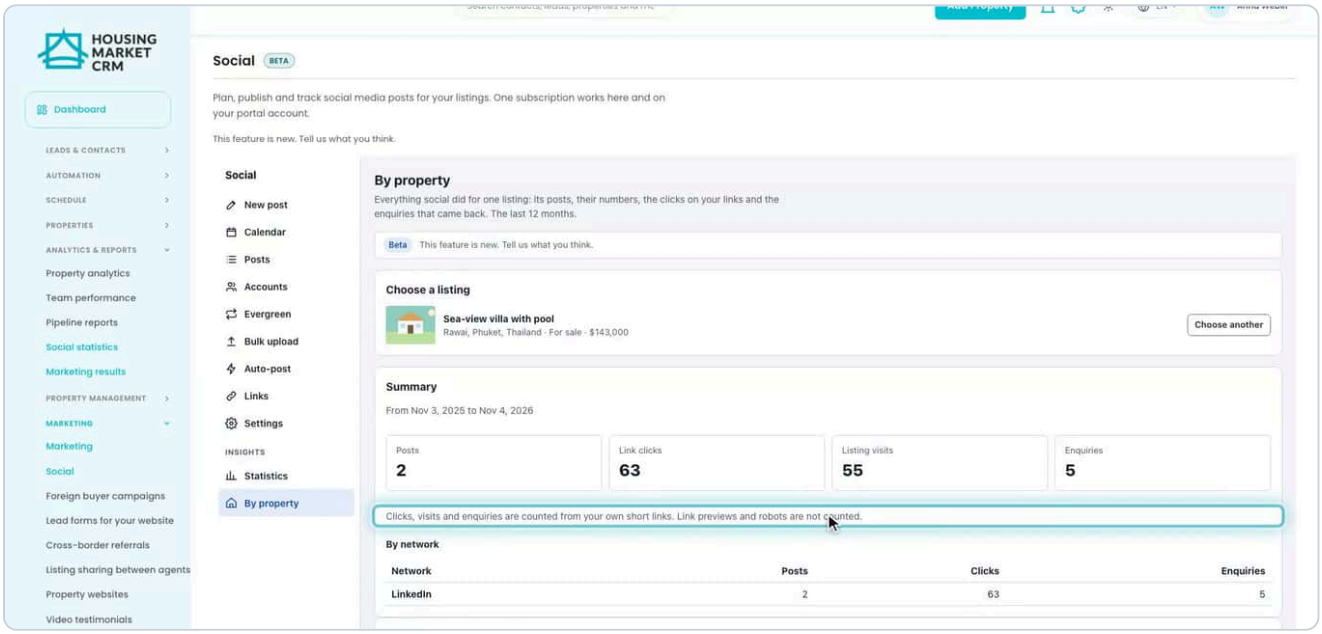


Figure 89.8 · Screen recorded 4 November 2026

9 Scroll down for the numbers **by network** and **by post**.

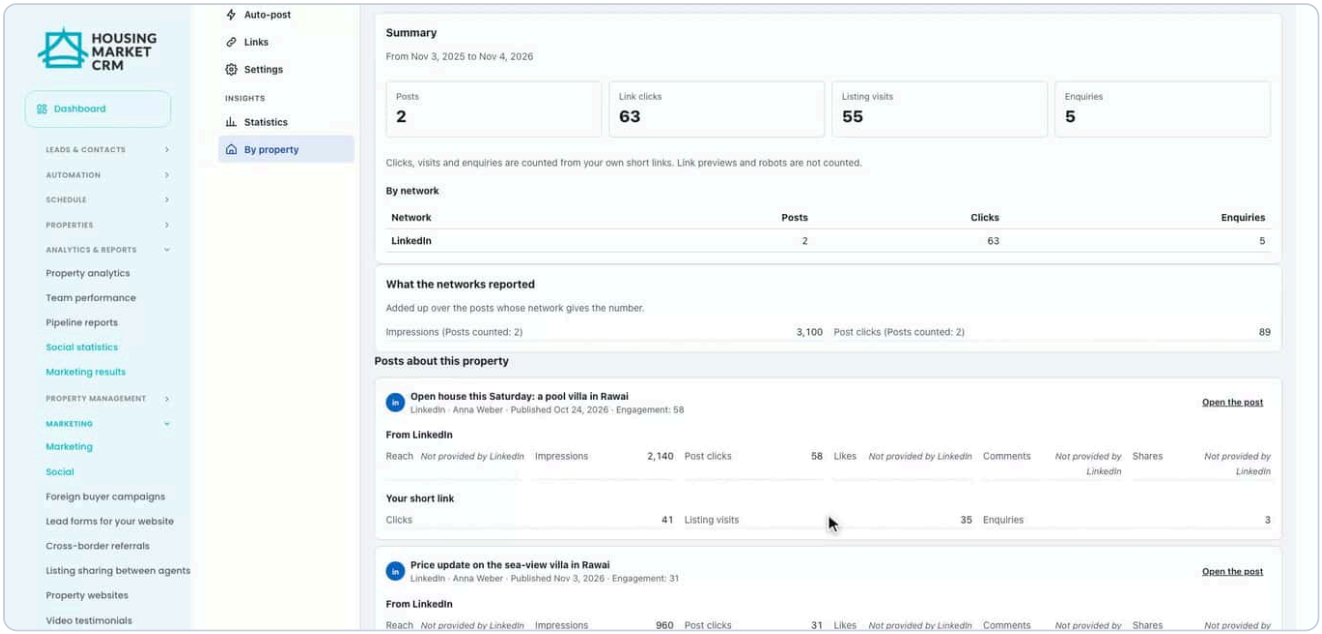


Figure 89.9 · Screen recorded 4 November 2026

10 Use **Choose another** to look at a different listing.

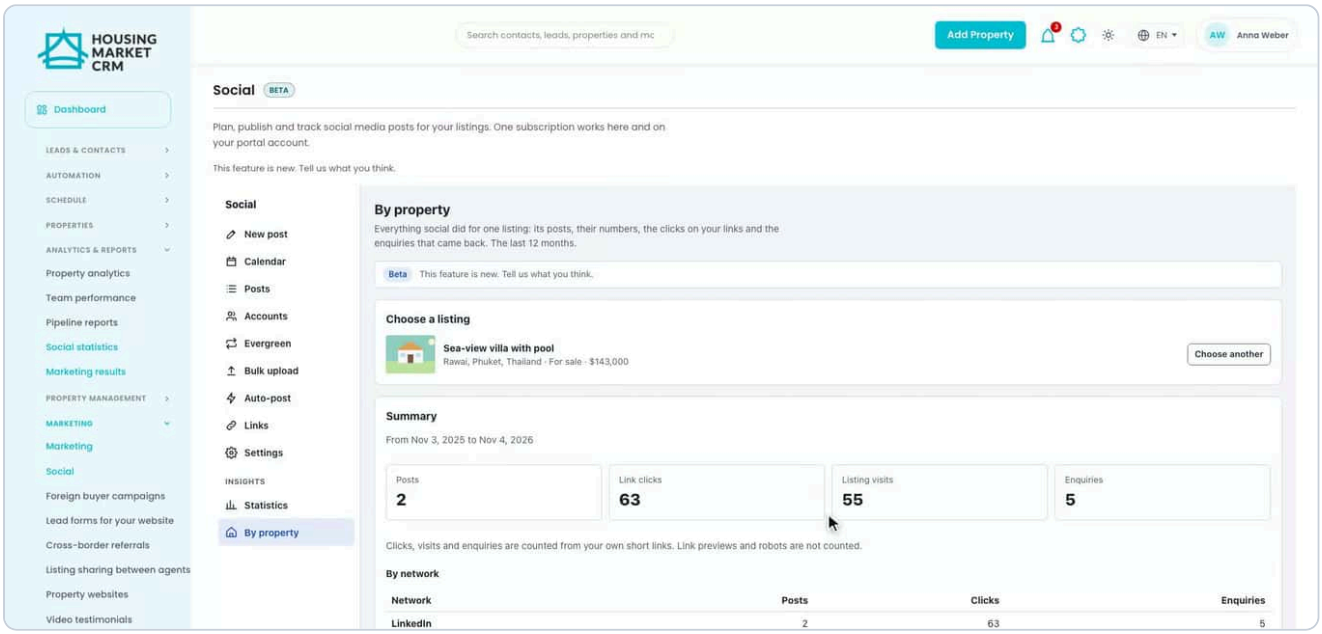


Figure 89.10 · Screen recorded 4 November 2026

90 CHAPTER 90

Delete my data

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

Choose the first day of the week, the time zone, the starting tone and the language for listing posts, and see your subscription and notifications.

Open Settings in Social. Under Display you can choose:

- The week starts on: Monday or Sunday, for the Calendar.
- Time zone: posts are scheduled and shown in this time zone. Automatic uses the one your browser reports.
- Default tone for listing posts: the starting tone when you create a post from a listing. You can change it each time.
- Language of listing posts: the language the text of a listing post is written in, or the same as the app.

These display choices are kept in the browser you are using, so on another browser or computer you choose them again.

Settings also shows your subscription (its state, when it renews or ends, and Manage billing) and your notifications, where Social tells you when an account needs reconnecting or a post could not go out. Your accounts and your data lets you delete your statistics, your inbox or your connected accounts, and you can disconnect an account at any time from Accounts.

From the Help Center: **What can I change in the Housing Market Social settings?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

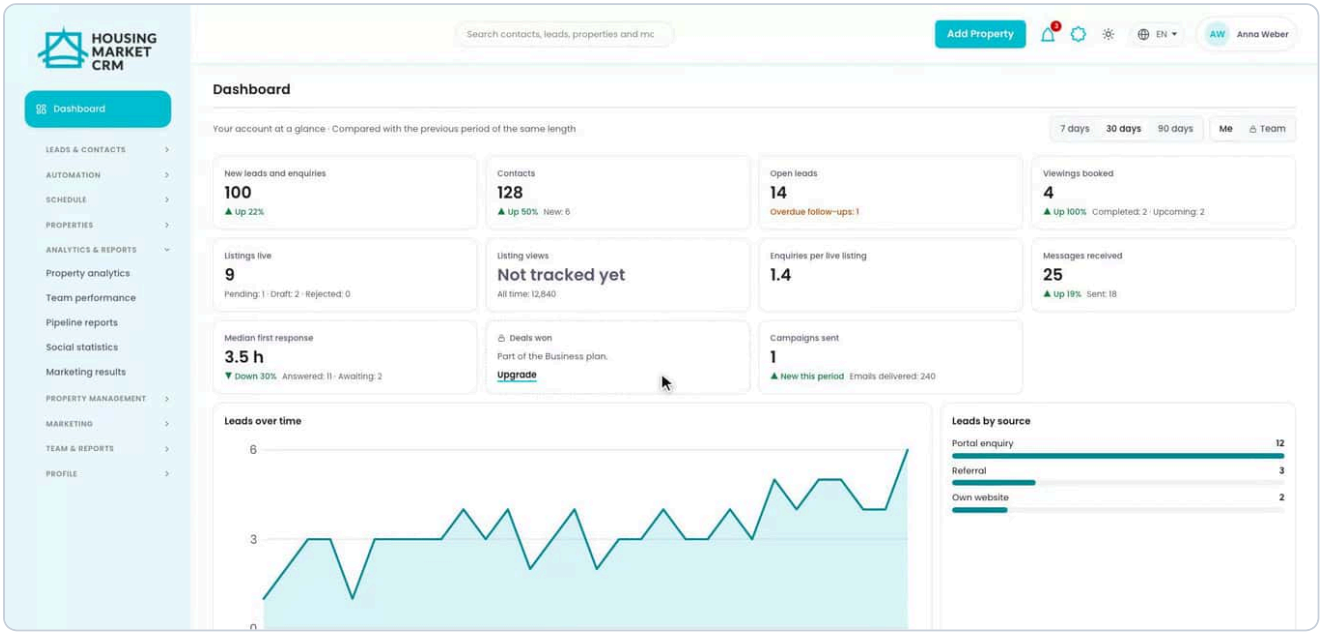


Figure 90.1 · Screen recorded 4 November 2026

2 Open **Marketing** in the left menu.

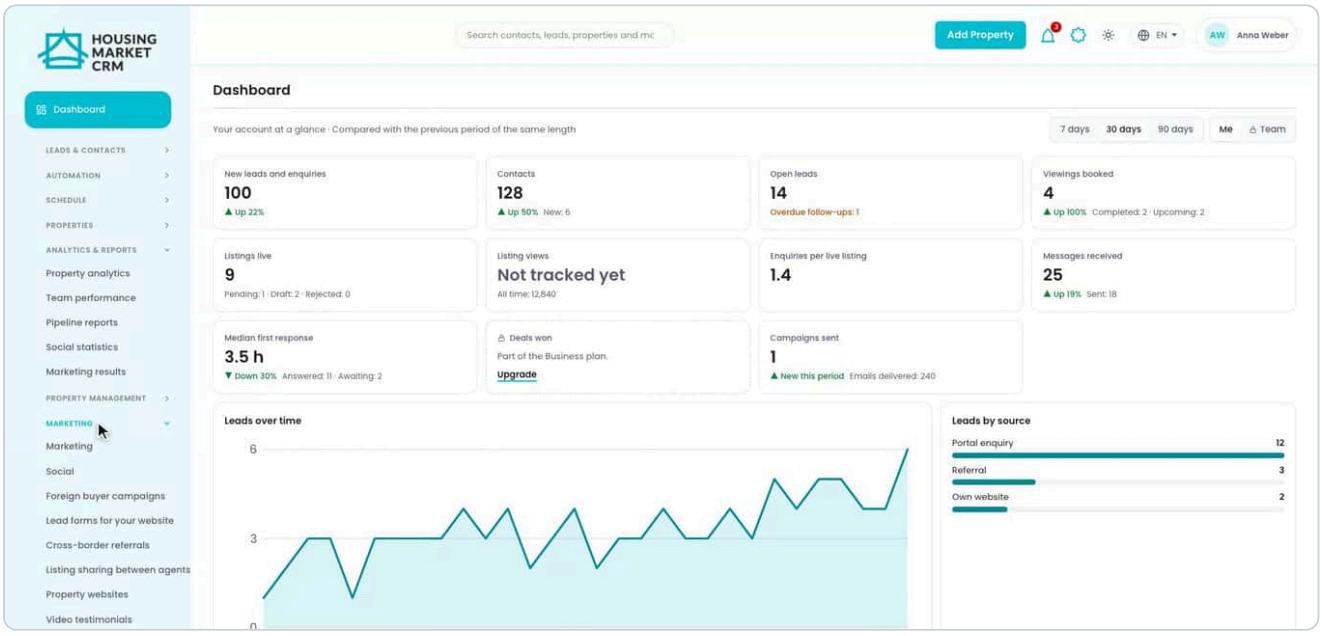


Figure 90.2 · Screen recorded 4 November 2026

3 Click **Social**.

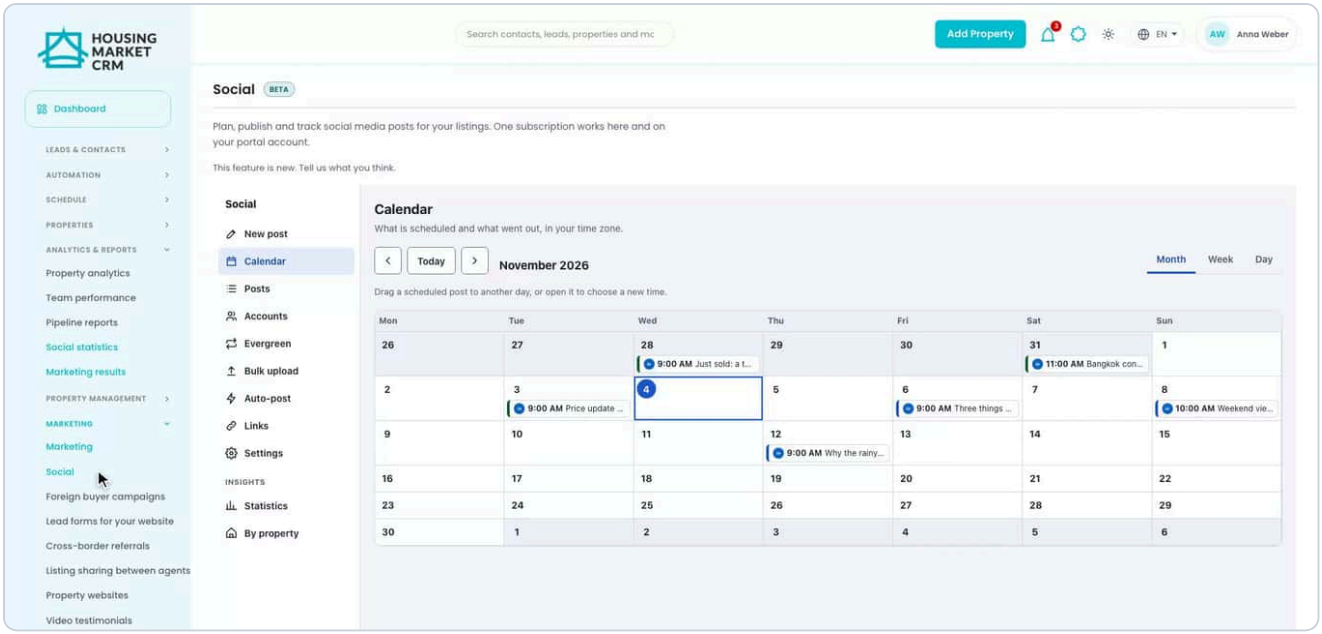


Figure 90.3 · Screen recorded 4 November 2026

4 Click **Settings**.

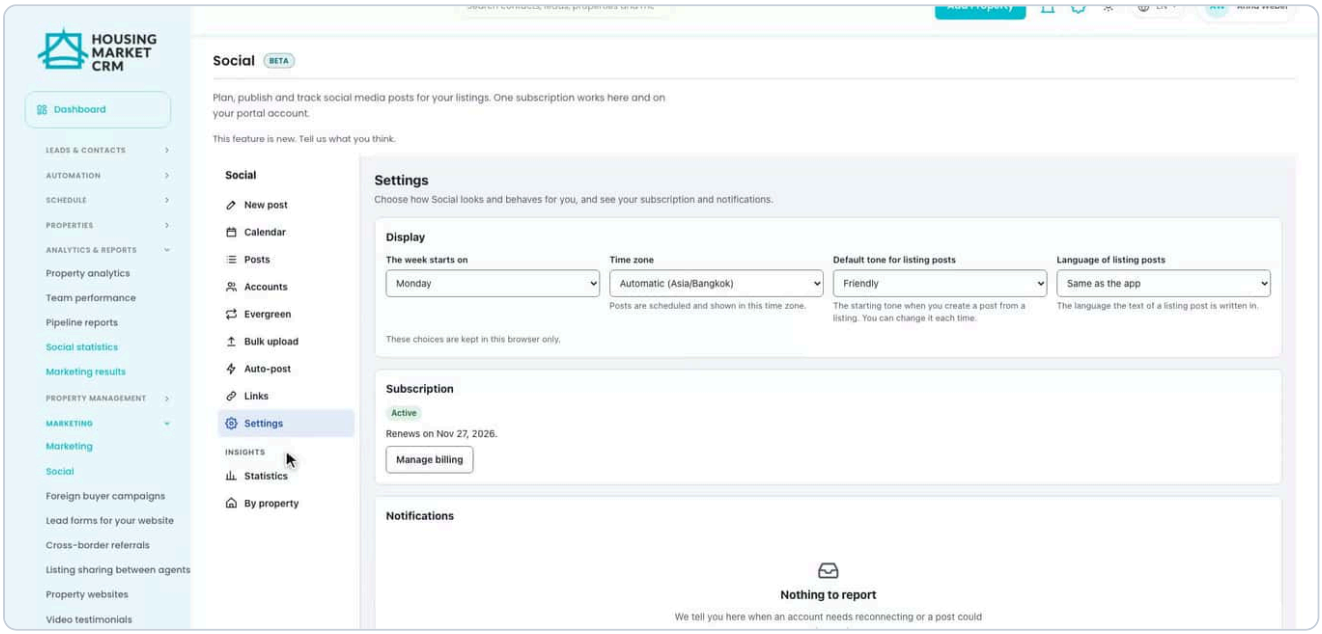


Figure 90.4 · Screen recorded 4 November 2026

5 Scroll to **Your accounts and your data.**

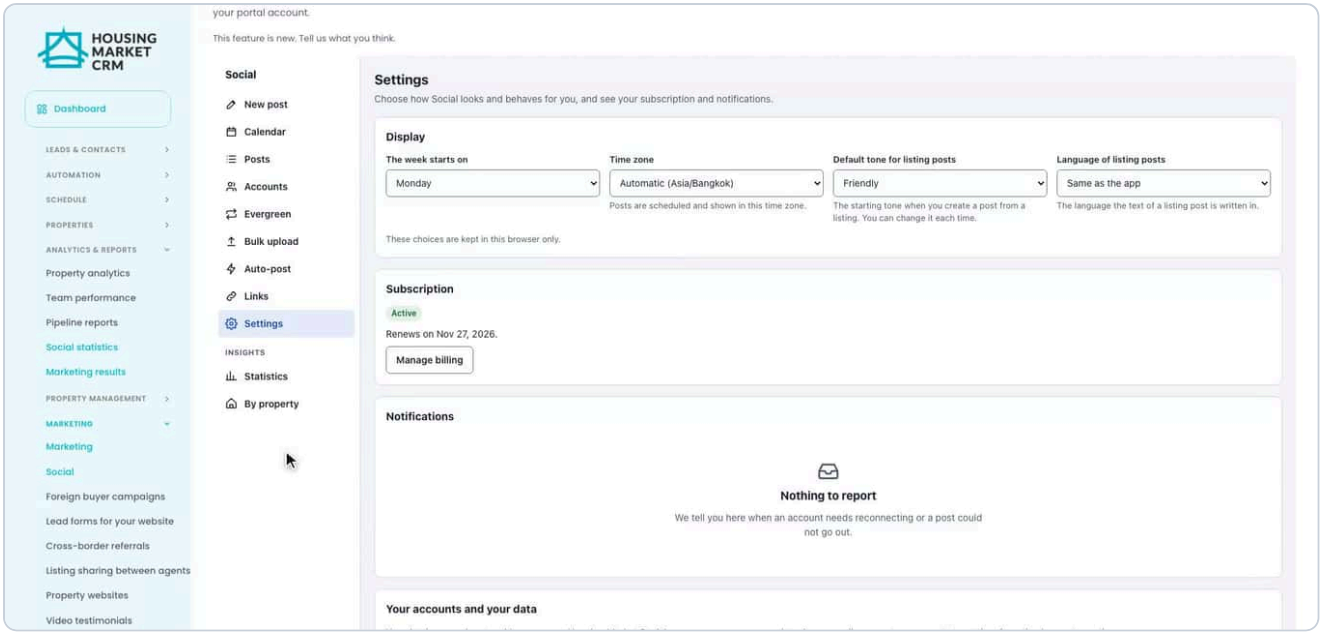


Figure 90.5 · Screen recorded 4 November 2026

6 Click **Delete my data.**

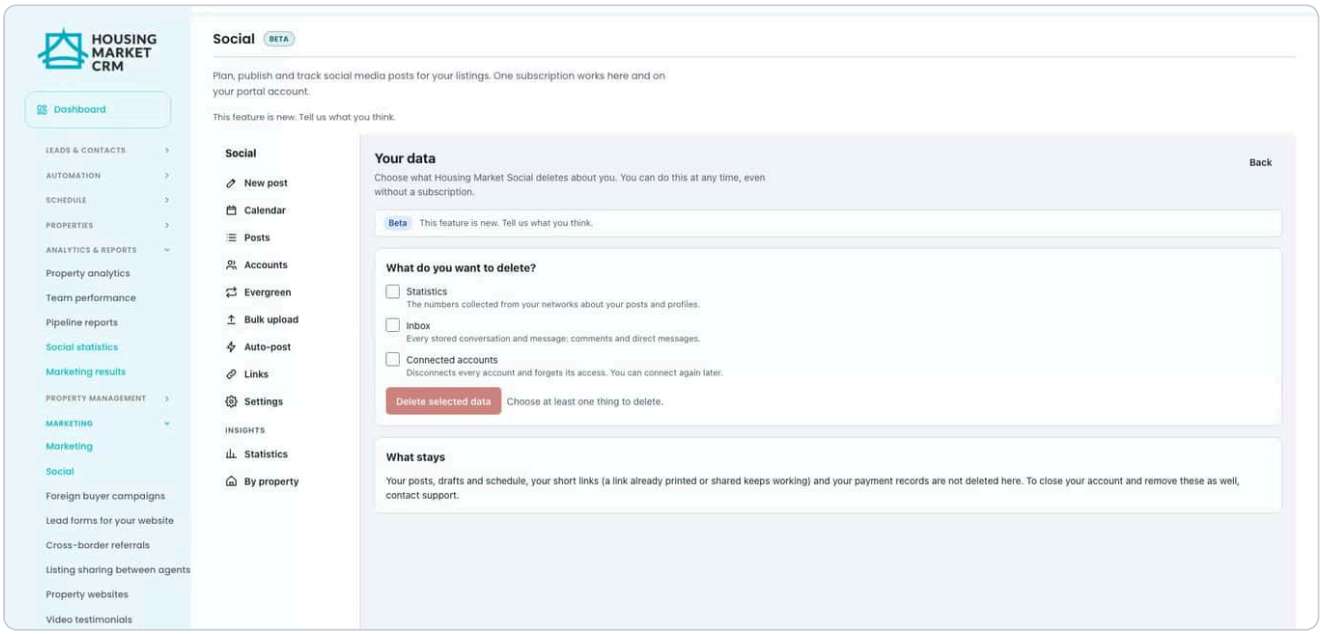


Figure 90.6 · Screen recorded 4 November 2026

7 You can do this **at any time**, even **without a subscription**.

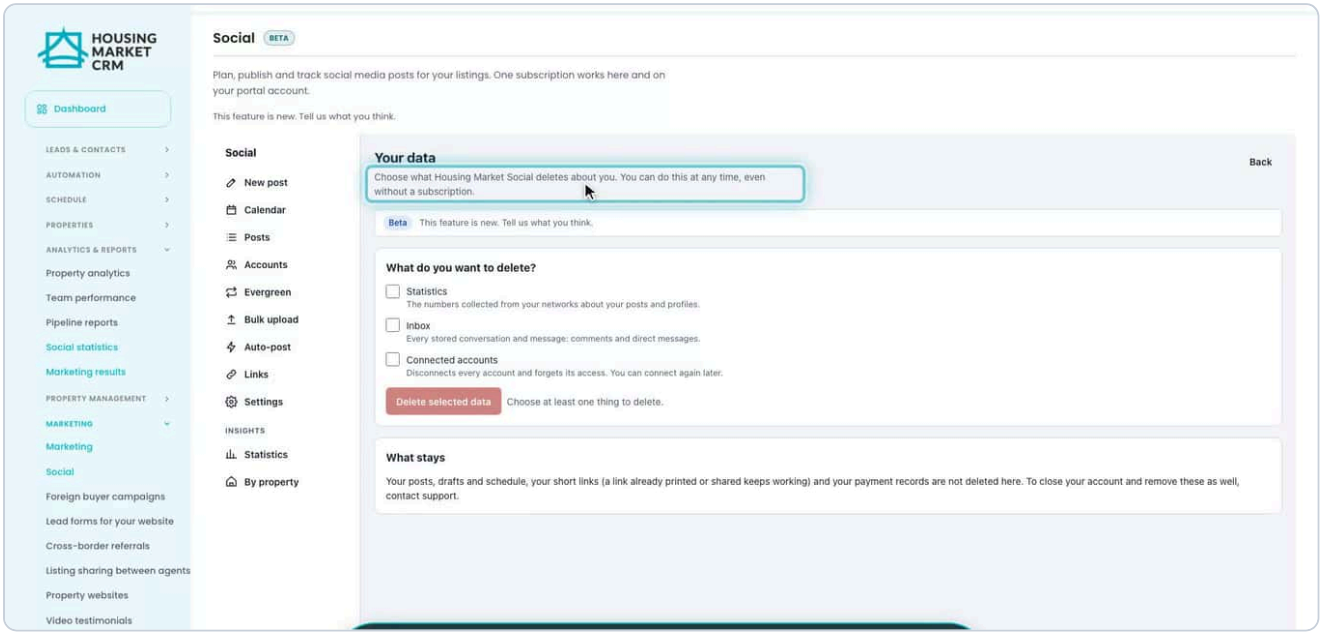


Figure 90.7 · Screen recorded 4 November 2026

8 **Statistics**: the numbers collected from your networks.

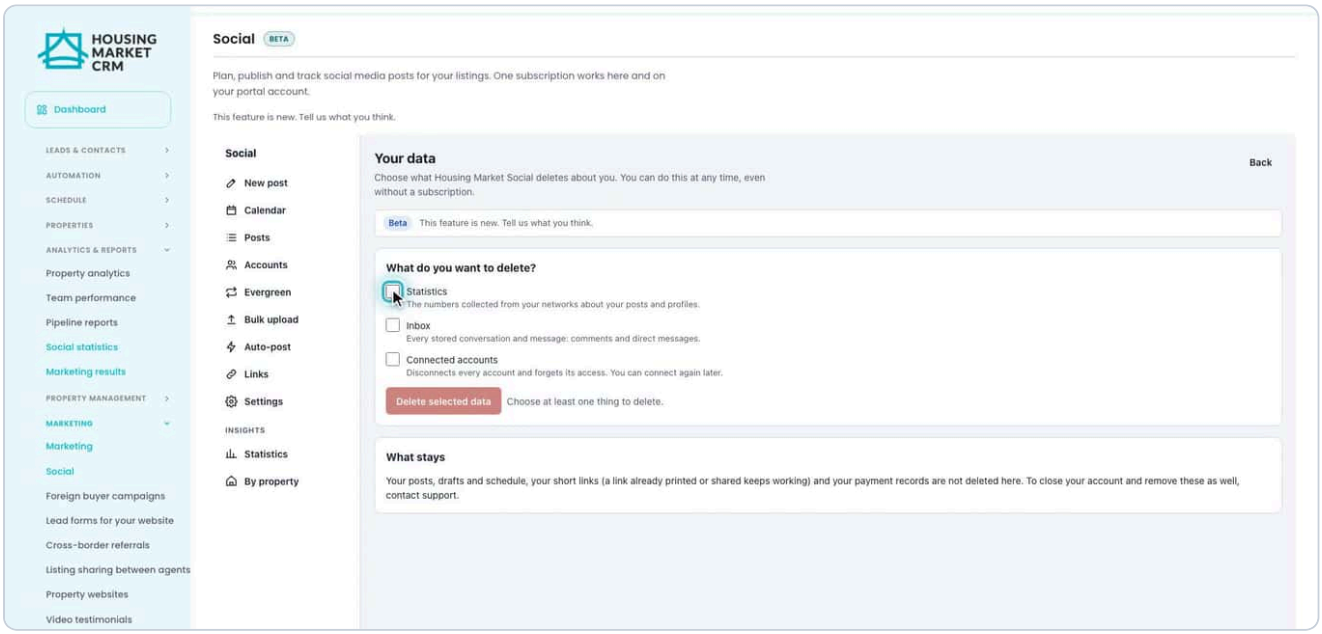


Figure 90.8 · Screen recorded 4 November 2026

9 **Inbox**: every stored comment and direct message.

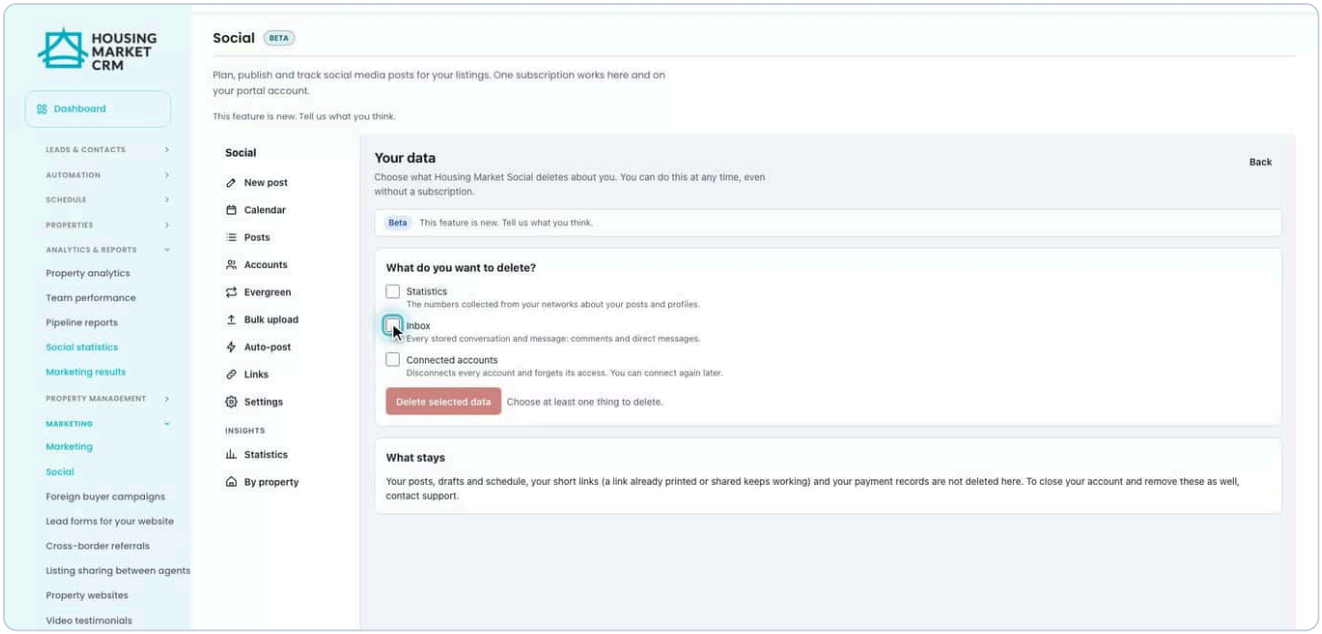


Figure 90.9 · Screen recorded 4 November 2026

10 **Connected accounts**: disconnects each one. You can connect again later.

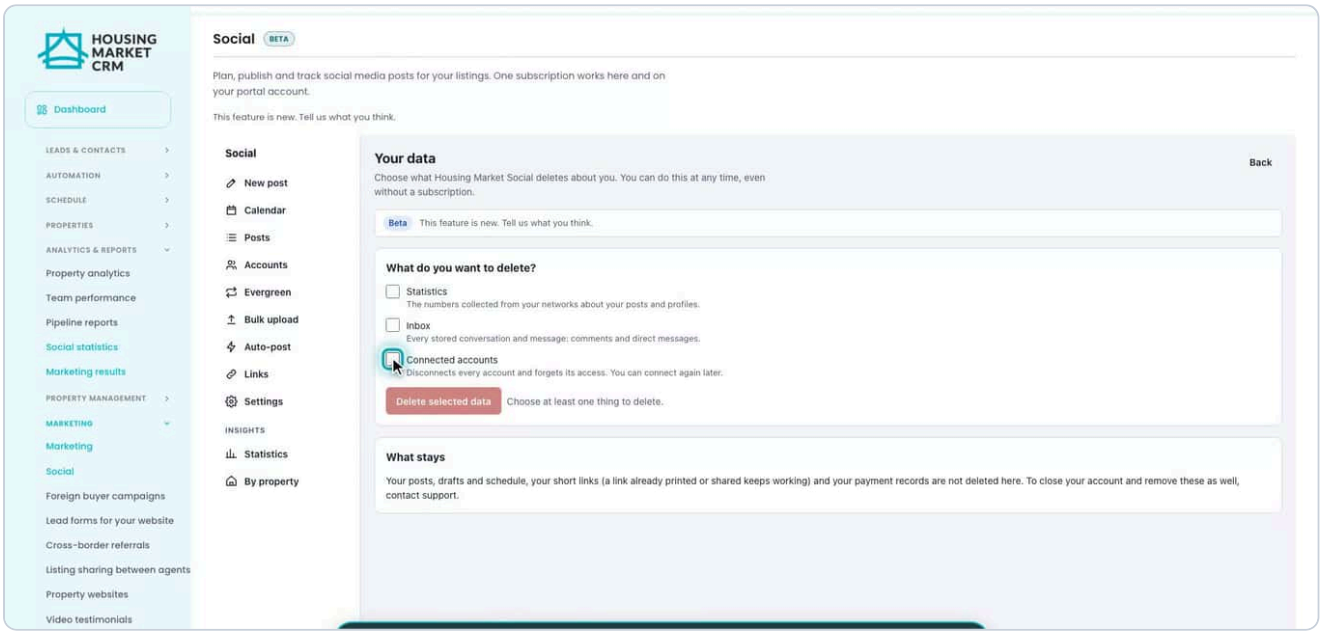


Figure 90.10 · Screen recorded 4 November 2026

11 Tick what you want deleted. Here, **Statistics**.

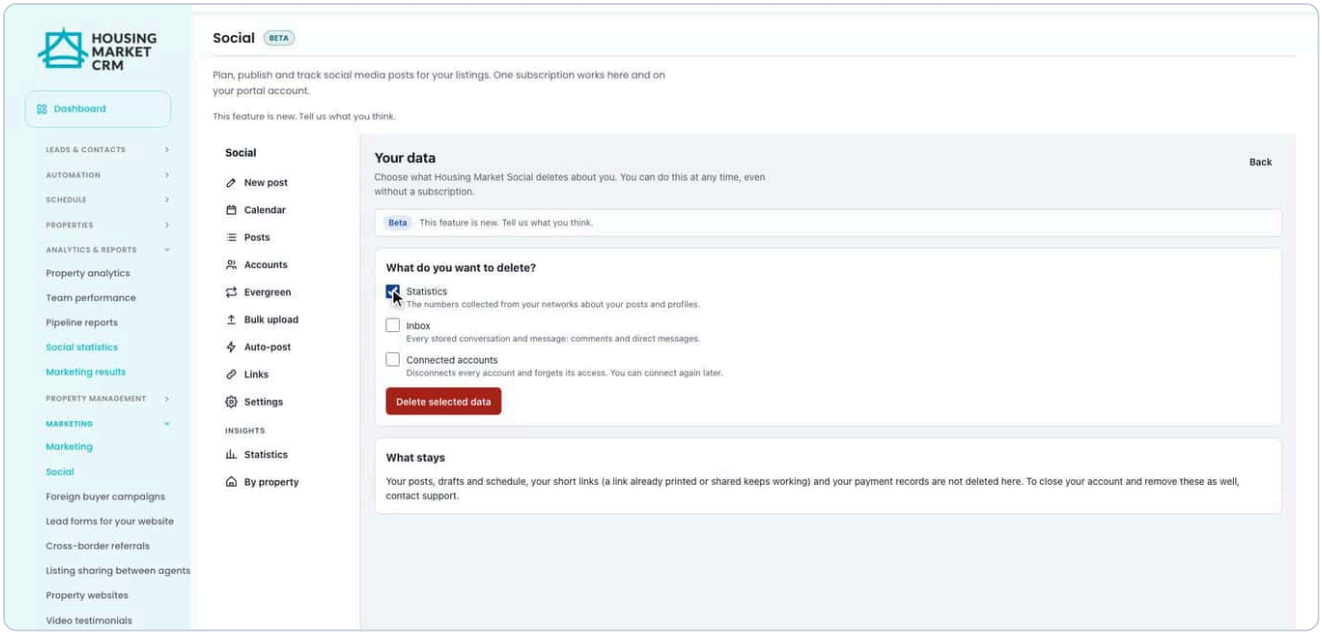


Figure 90.11 · Screen recorded 4 November 2026

12 Then **Delete selected data** becomes available. We stop here.

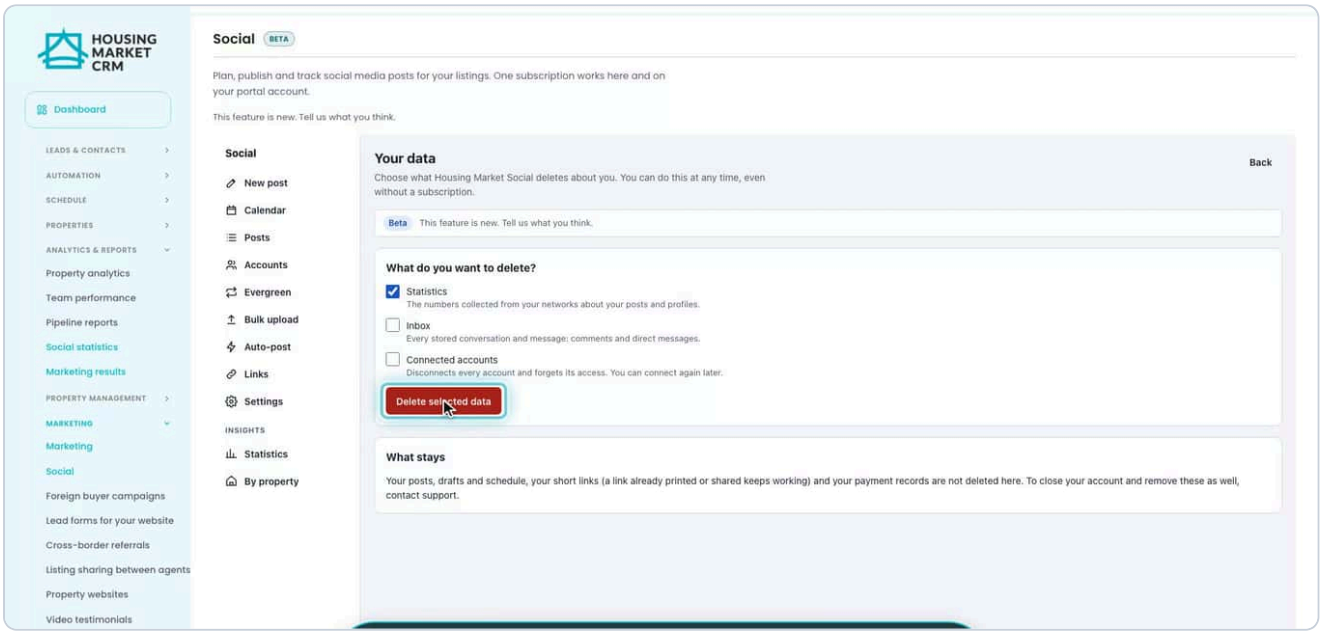


Figure 90.12 · Screen recorded 4 November 2026

13 Under **What stays**, read what is **not** deleted here.

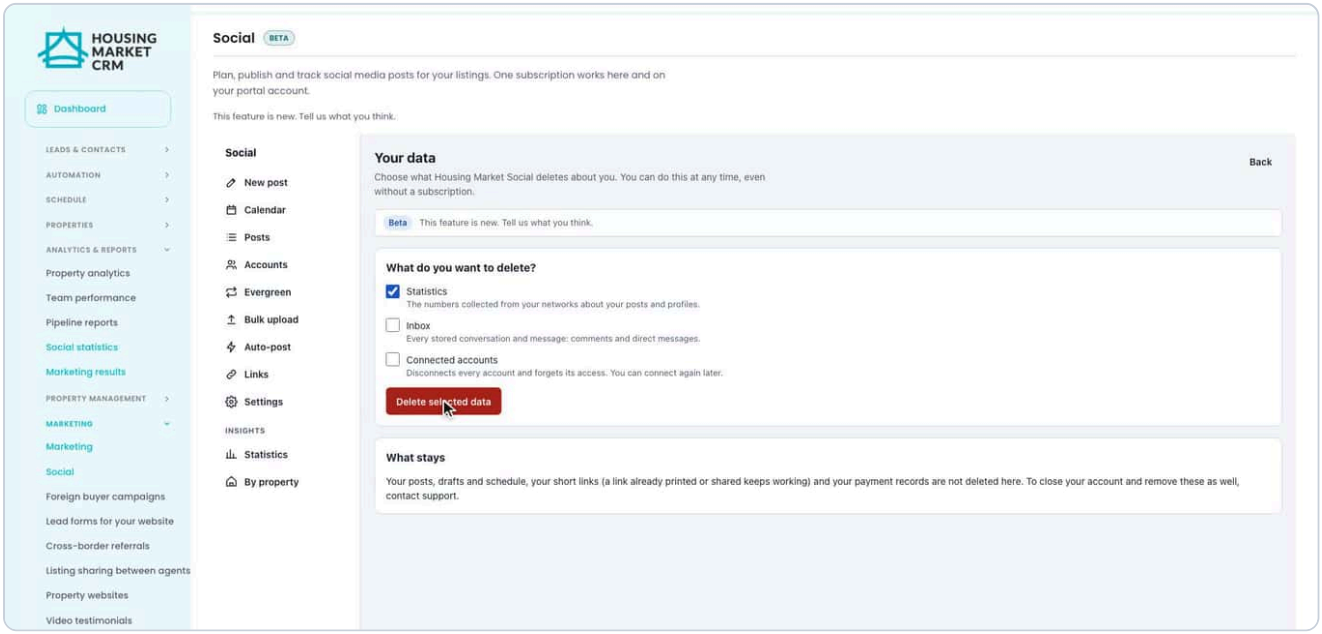


Figure 90.13 · Screen recorded 4 November 2026

14 Your **posts**, **short links** and **payment records** stay.

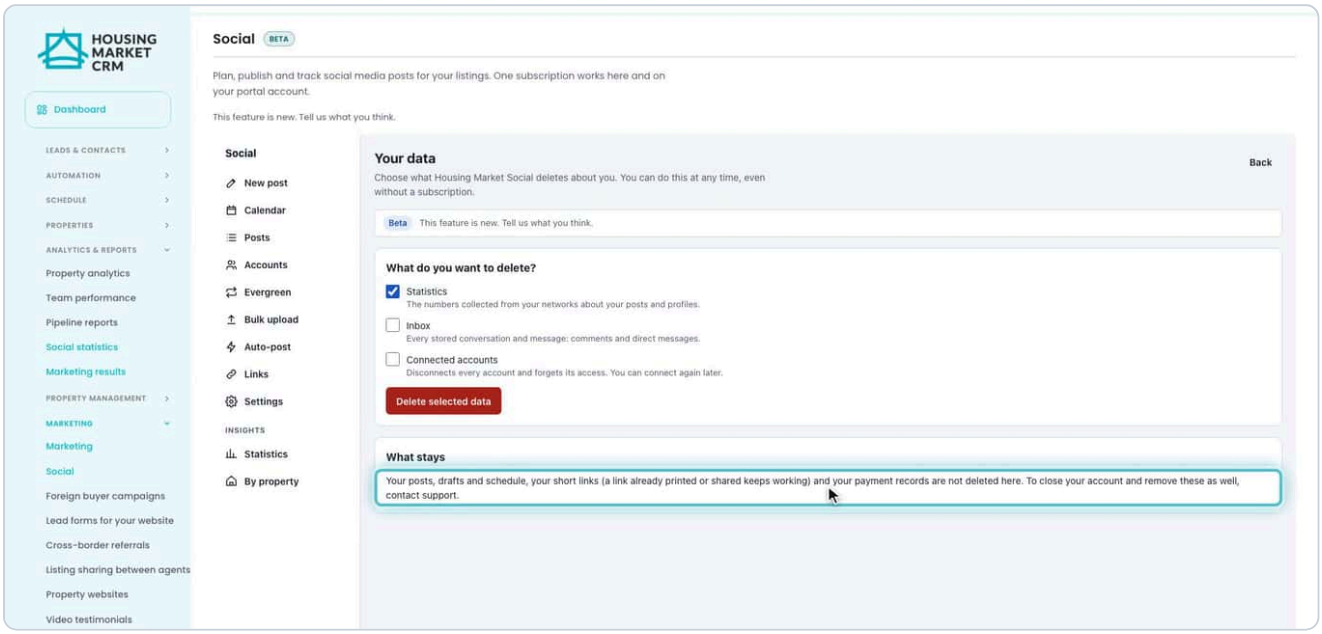


Figure 90.14 · Screen recorded 4 November 2026

15 To close your account and remove these as well, **contact support**.

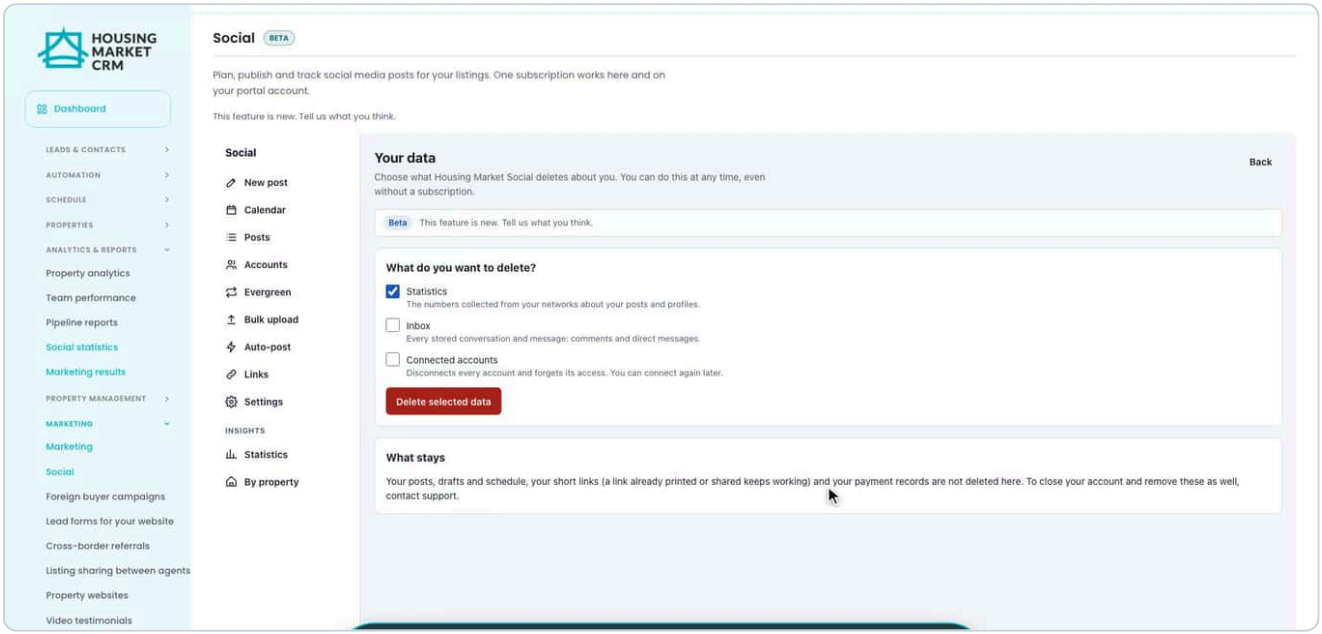


Figure 90.15 · Screen recorded 4 November 2026

91 CHAPTER 91

Post by hand to Facebook and Instagram

All plans | For agents who want their properties on their own website | Watch the video

TODO No Help Center article covers this task yet, so this chapter has no explanation. Write the article, then map it in packages/handbooks/src/products/crm.ts. (Social, Accounts: personal profiles and groups are posted by you, with a reminder; nothing posts to them automatically. The existing answer, can-i-post-to-my-personal-facebook-or-instagram-profile, ends with a "coming soon" sentence about Business Pages: reword it as Currently updating, then map it here.)

STEP BY STEP

1 In **Marketing > Social**, open **Accounts**.

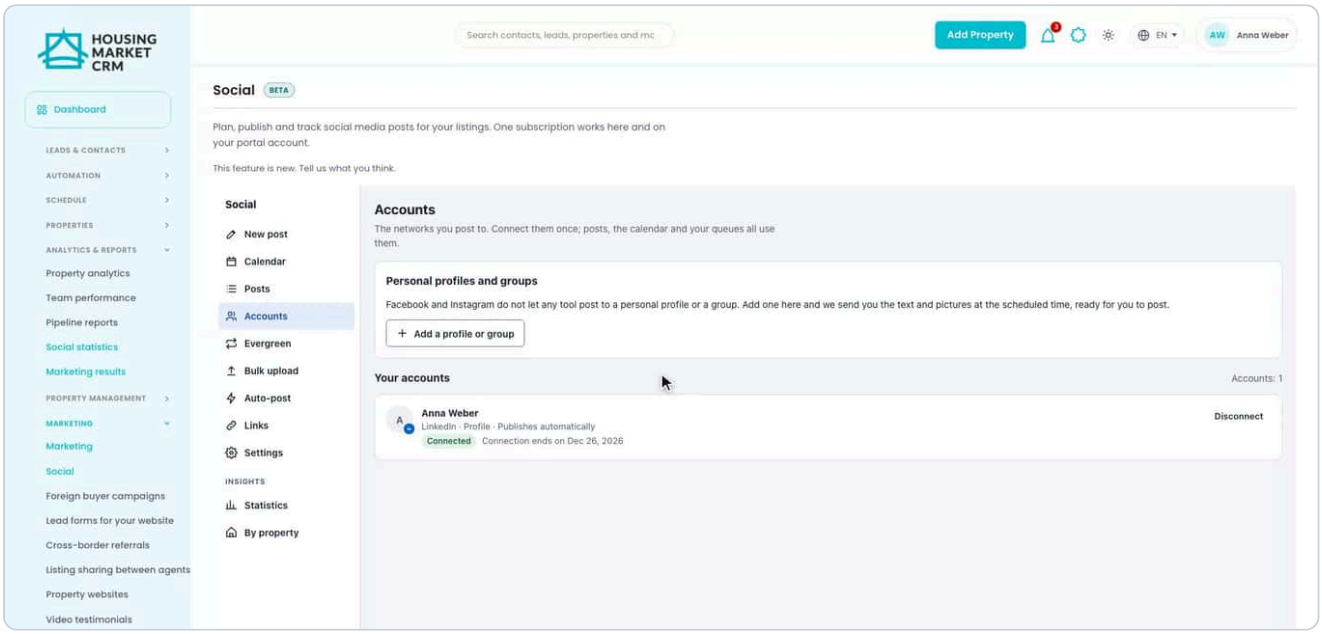


Figure 91.1 · Screen recorded 4 November 2026

2 **Personal profiles and groups** are posted **by you**.

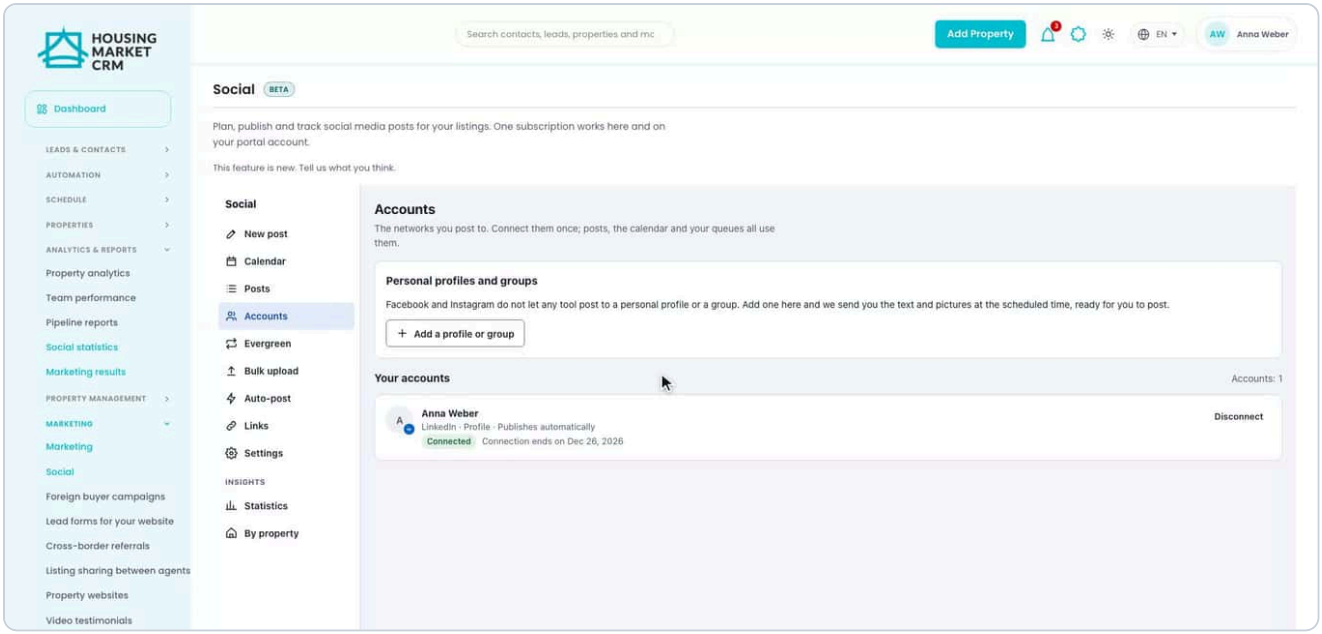


Figure 91.2 · Screen recorded 4 November 2026

3 Facebook and Instagram **do not let any tool post** to them.

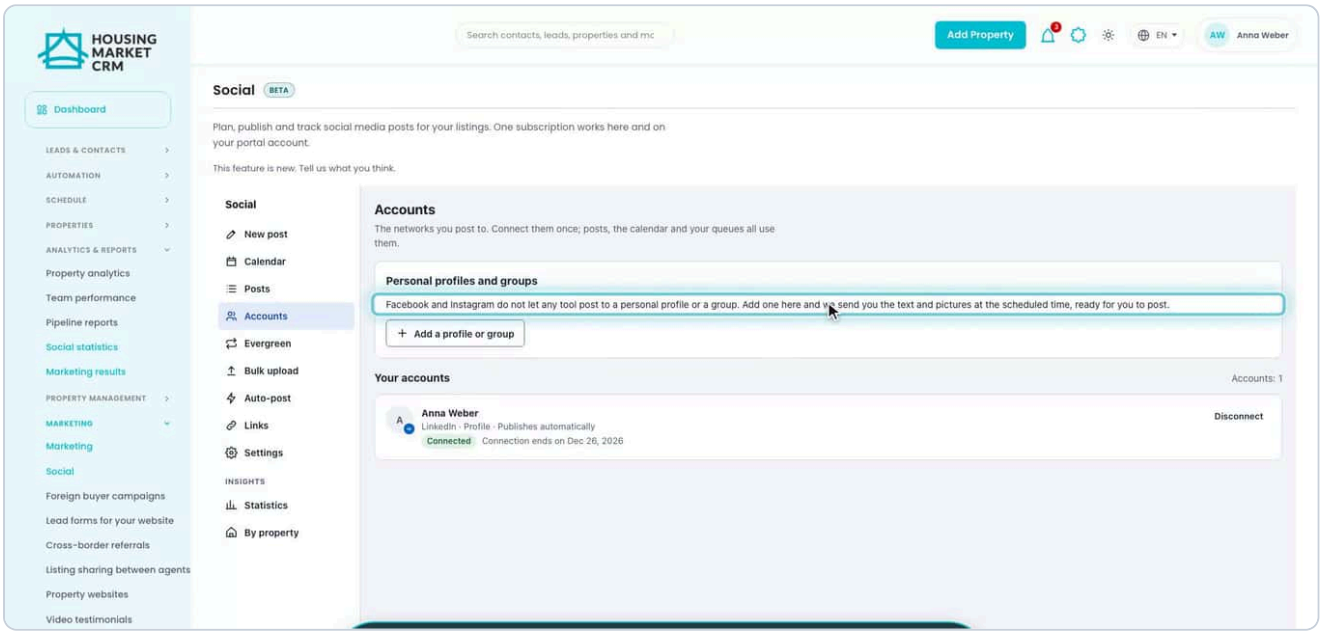


Figure 91.3 · Screen recorded 4 November 2026

4 So Housing Market **sends you the text and pictures**, ready to post.

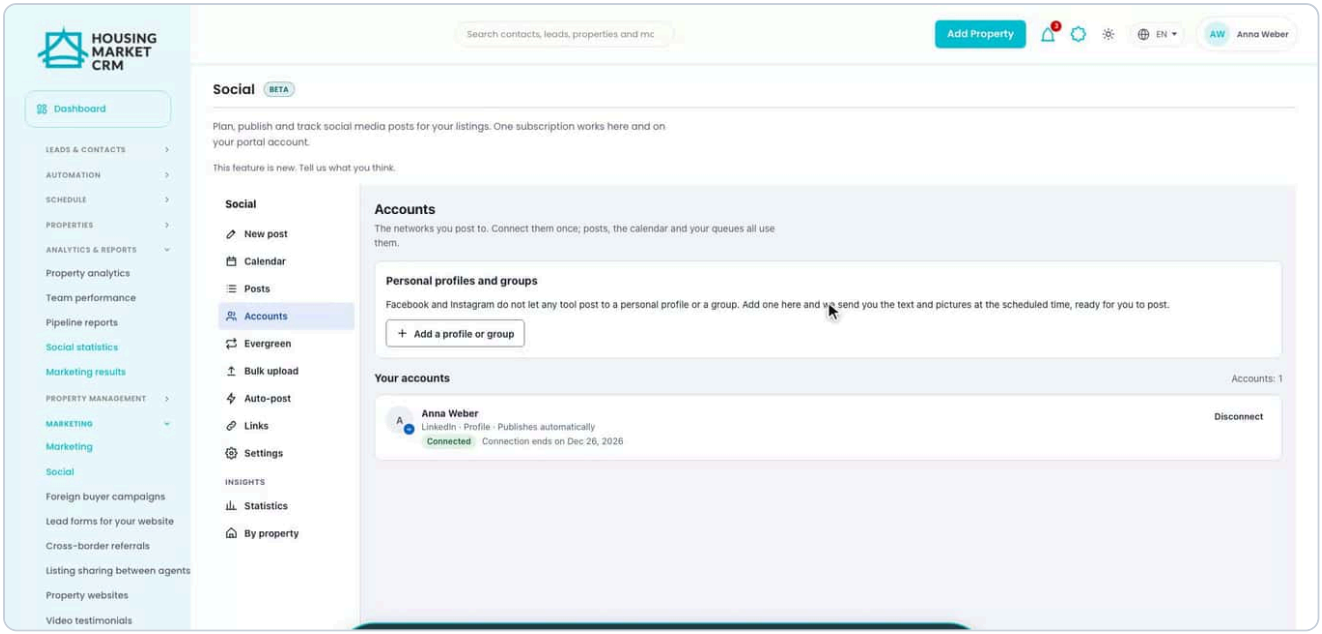


Figure 91.4 · Screen recorded 4 November 2026

5 Click **Add a profile or group**.

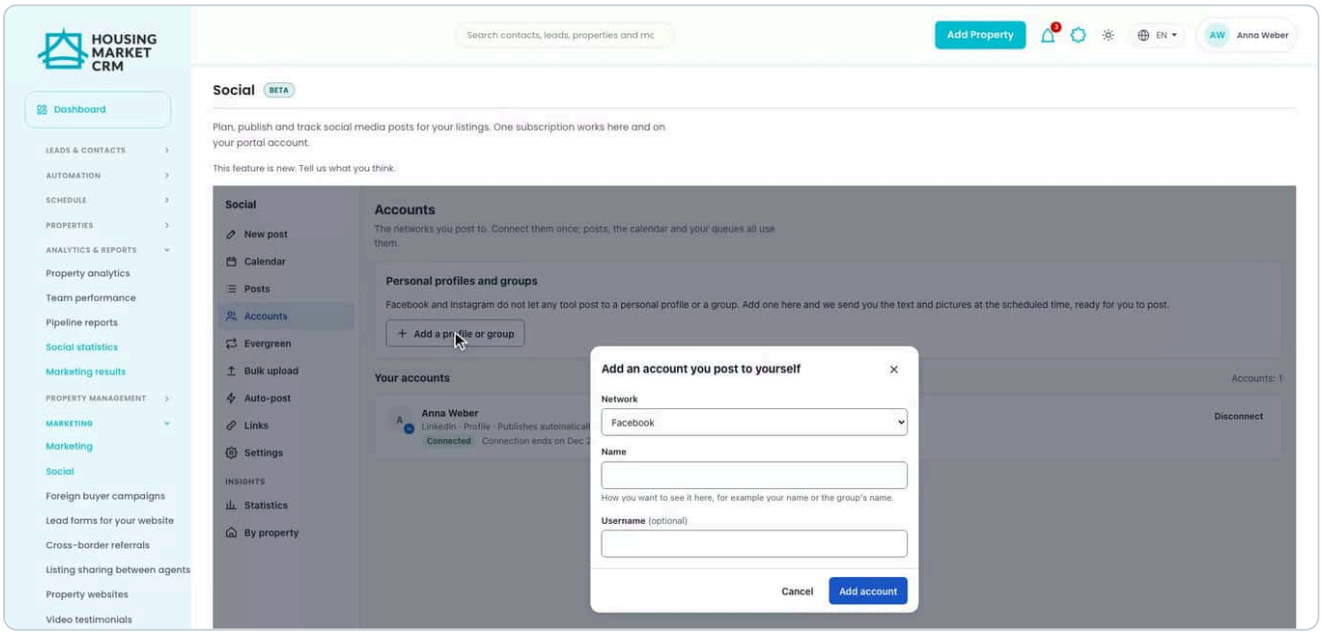


Figure 91.5 · Screen recorded 4 November 2026

6 Choose **Facebook** or **Instagram** give it a **name** you will recognise.

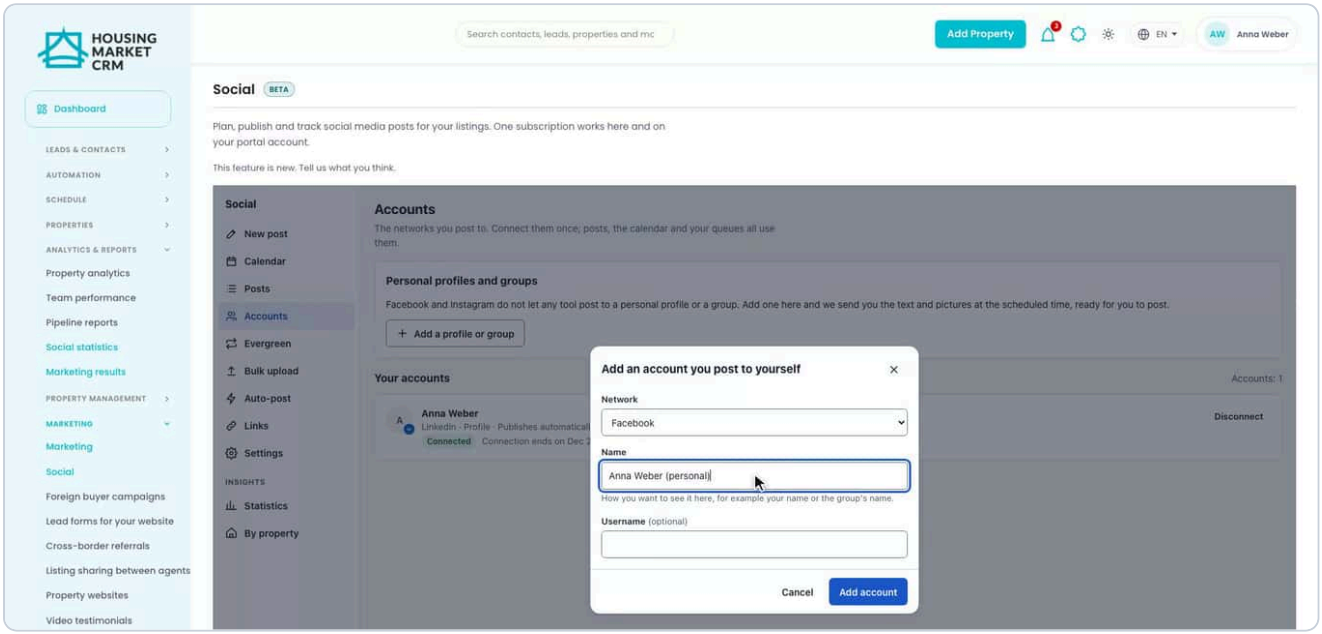


Figure 91.6 · Screen recorded 4 November 2026

7 and, if you like, its **username**.

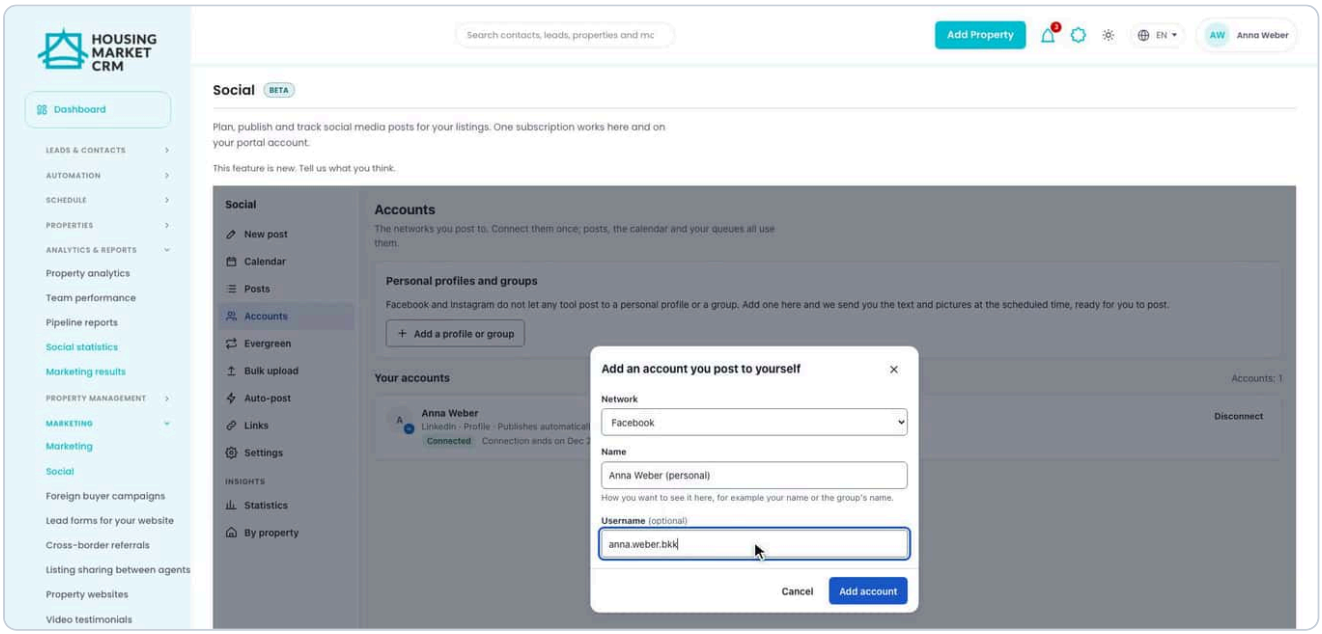


Figure 91.7 · Screen recorded 4 November 2026

8 Click **Add account.**

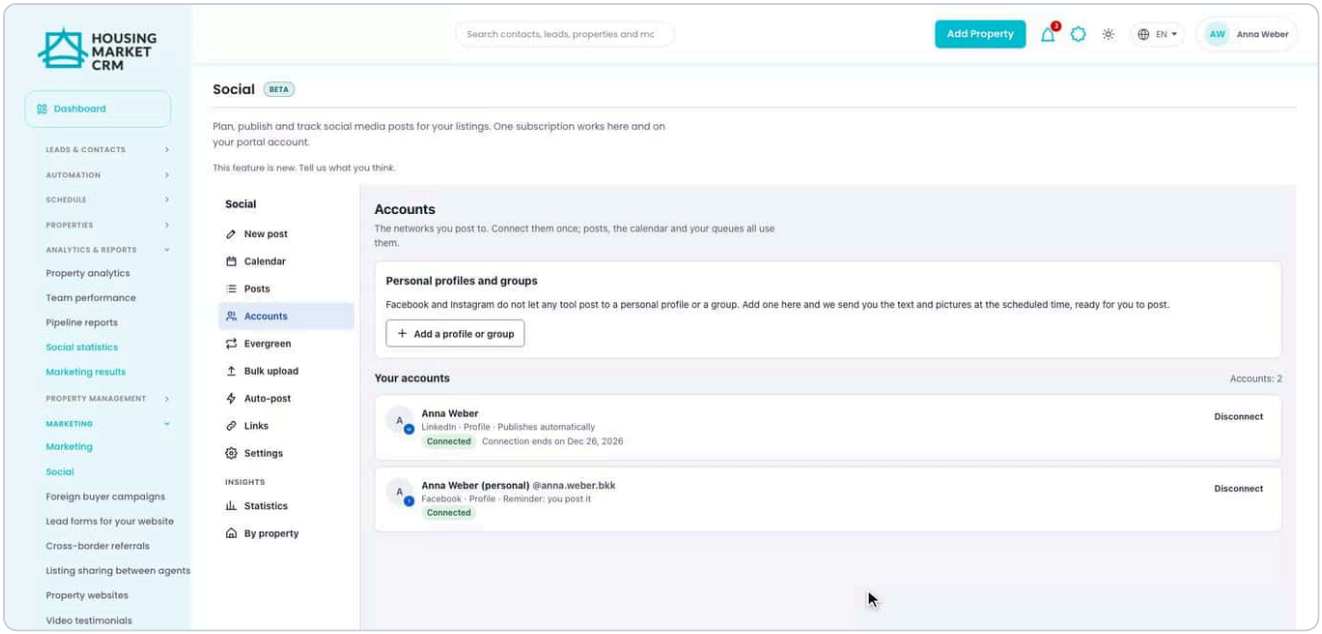


Figure 91.8 · Screen recorded 4 November 2026

9 It joins **Your accounts.**

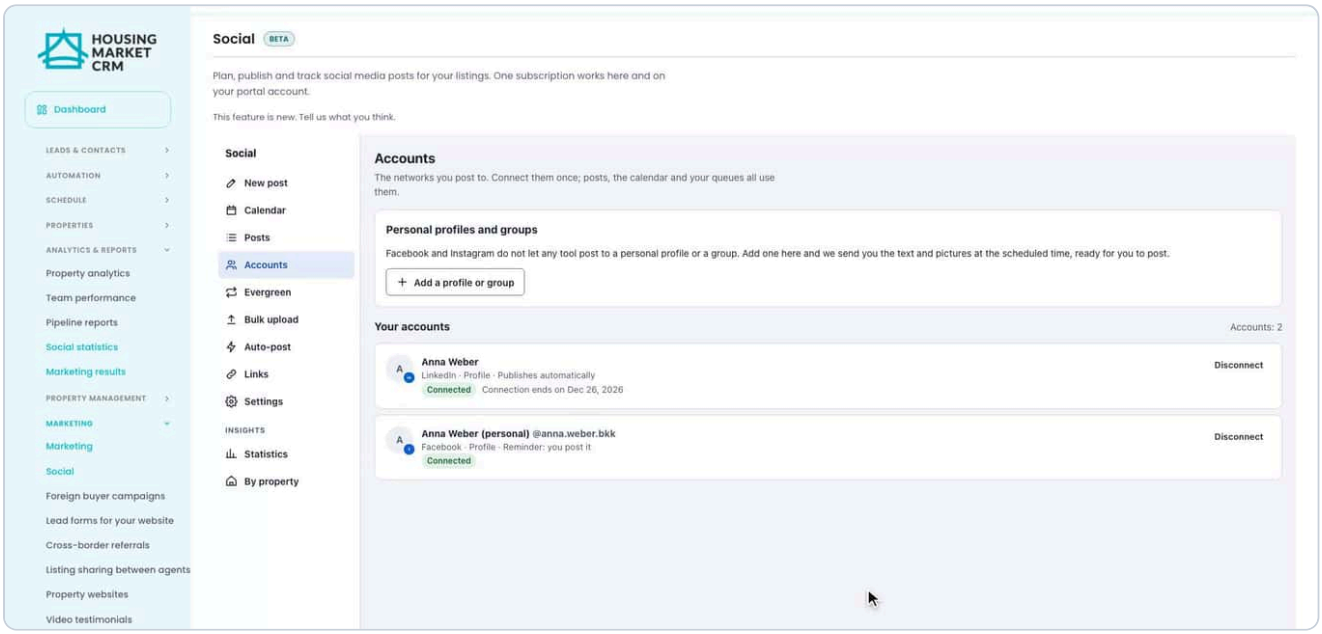


Figure 91.9 · Screen recorded 4 November 2026

10 It says **Reminder: you post it**. No password, no connection.

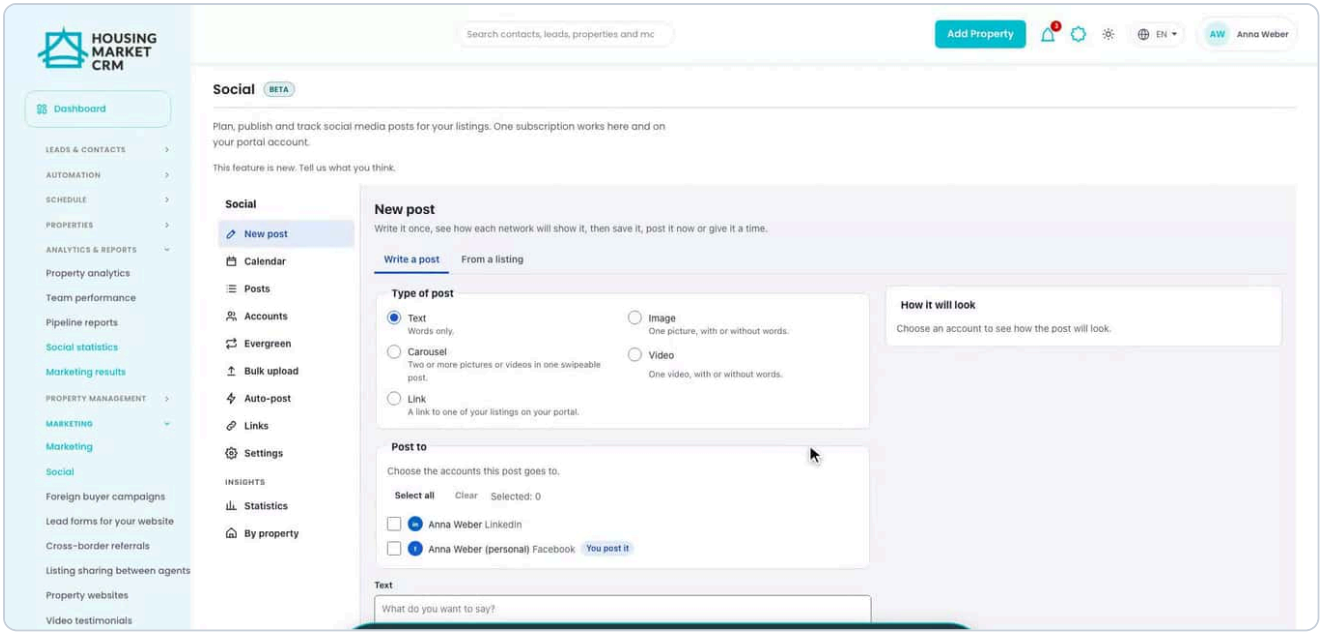


Figure 91.10 · Screen recorded 4 November 2026

11 Open **New post**.

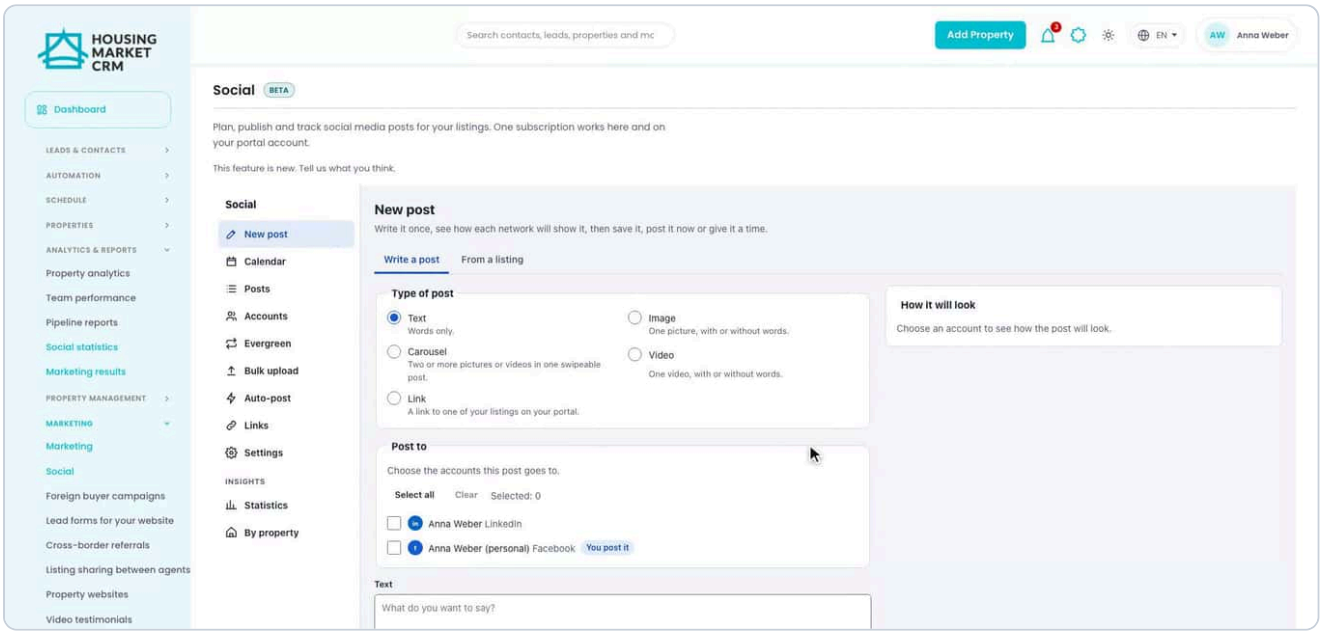


Figure 91.11 · Screen recorded 4 November 2026

12 Tick your profile. **You post it** marks the accounts you post yourself.

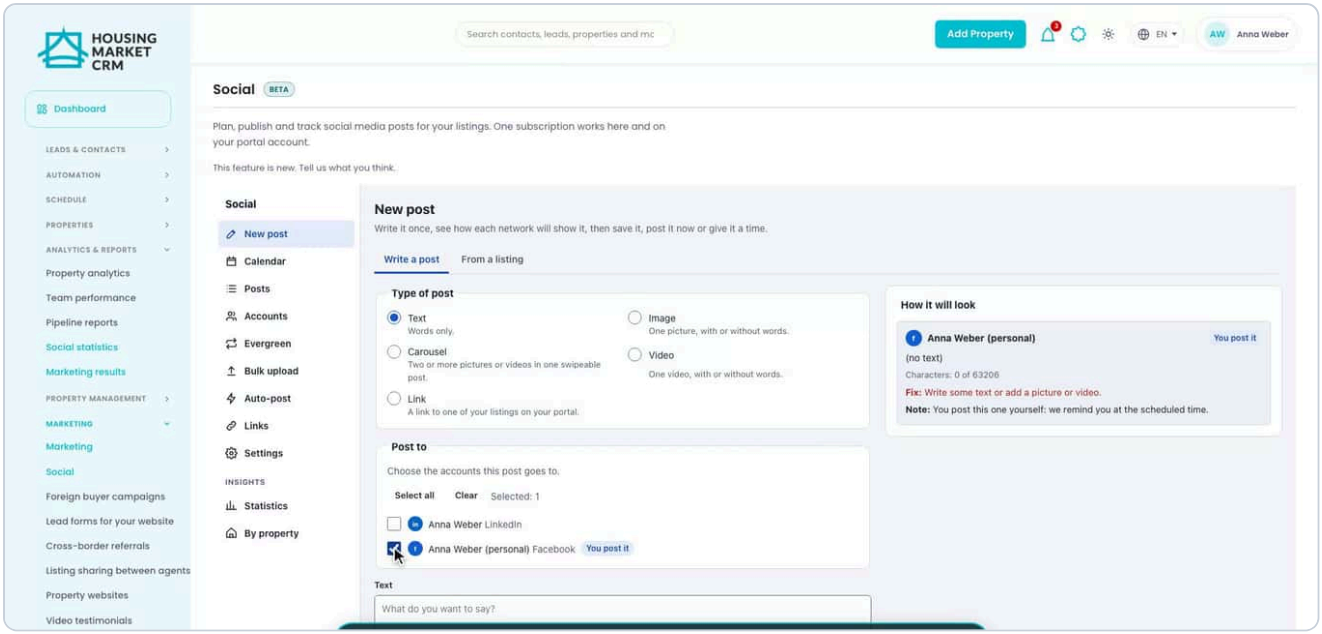


Figure 91.12 · Screen recorded 4 November 2026

13 Write the text, as for any post.

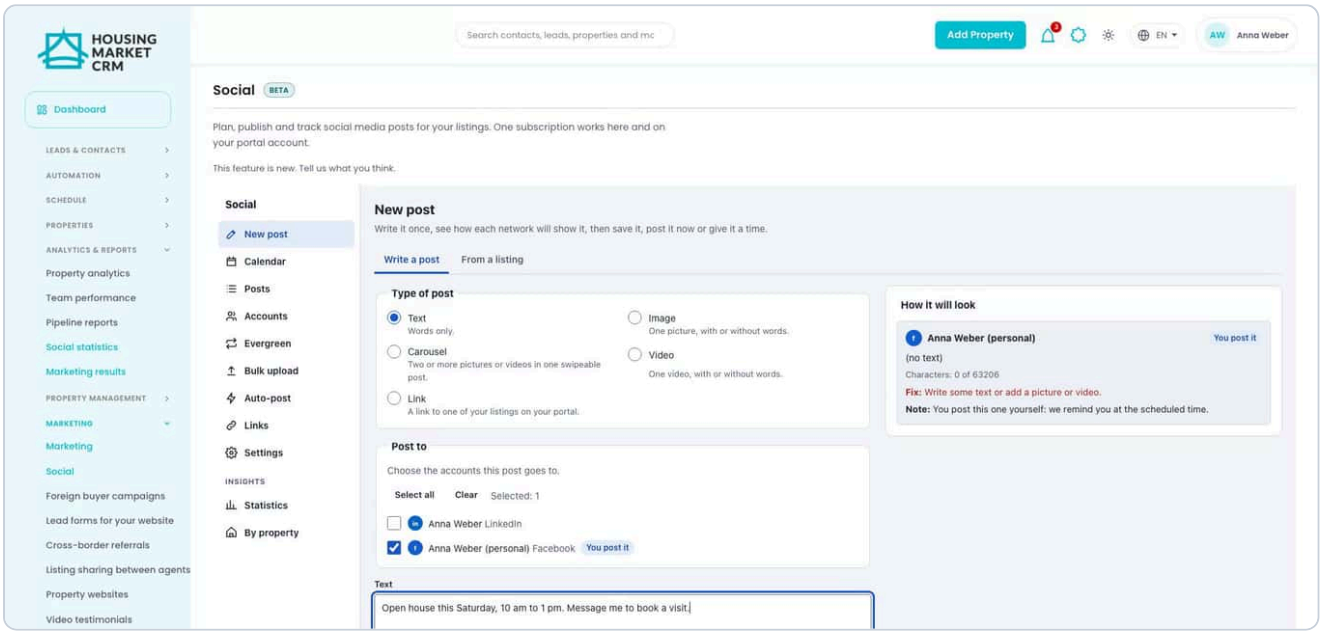


Figure 91.13 · Screen recorded 4 November 2026

14 Choose **Pick a date and time**.

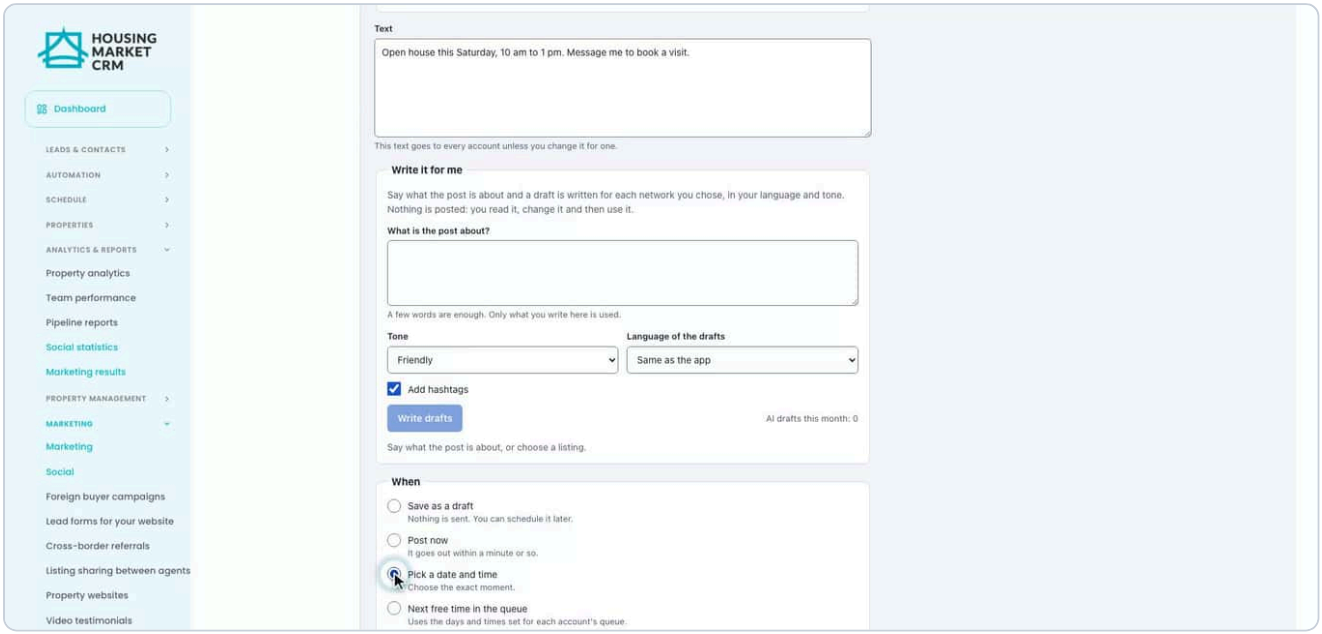


Figure 91.14 · Screen recorded 4 November 2026

15 Here: in two days, at 9 AM.

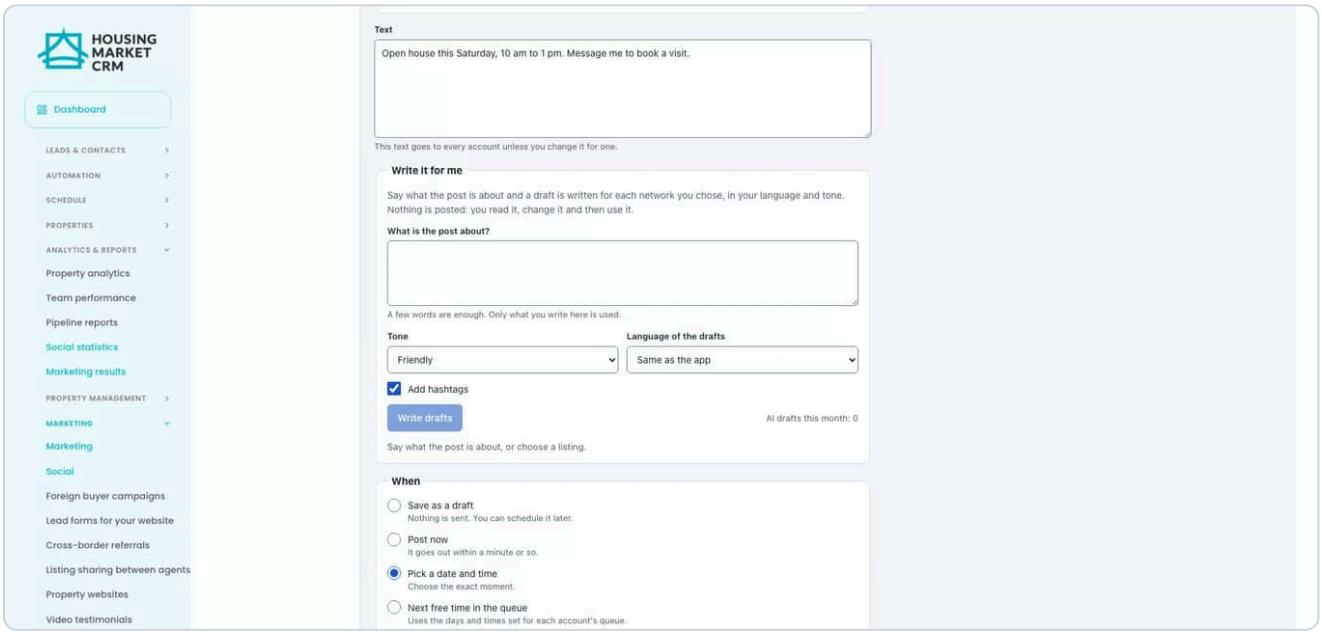


Figure 91.15 · Screen recorded 4 November 2026

16 Click **Schedule post.**

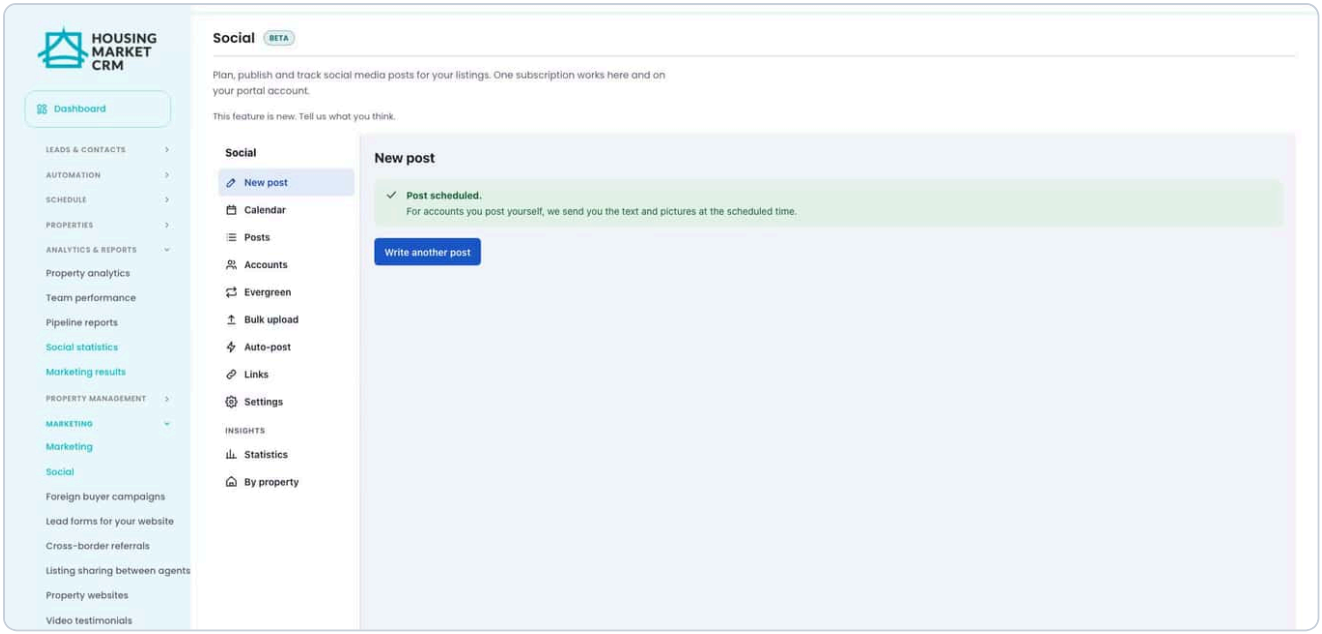


Figure 91.16 · Screen recorded 4 November 2026

17 At that time, **you are sent the text and pictures.**

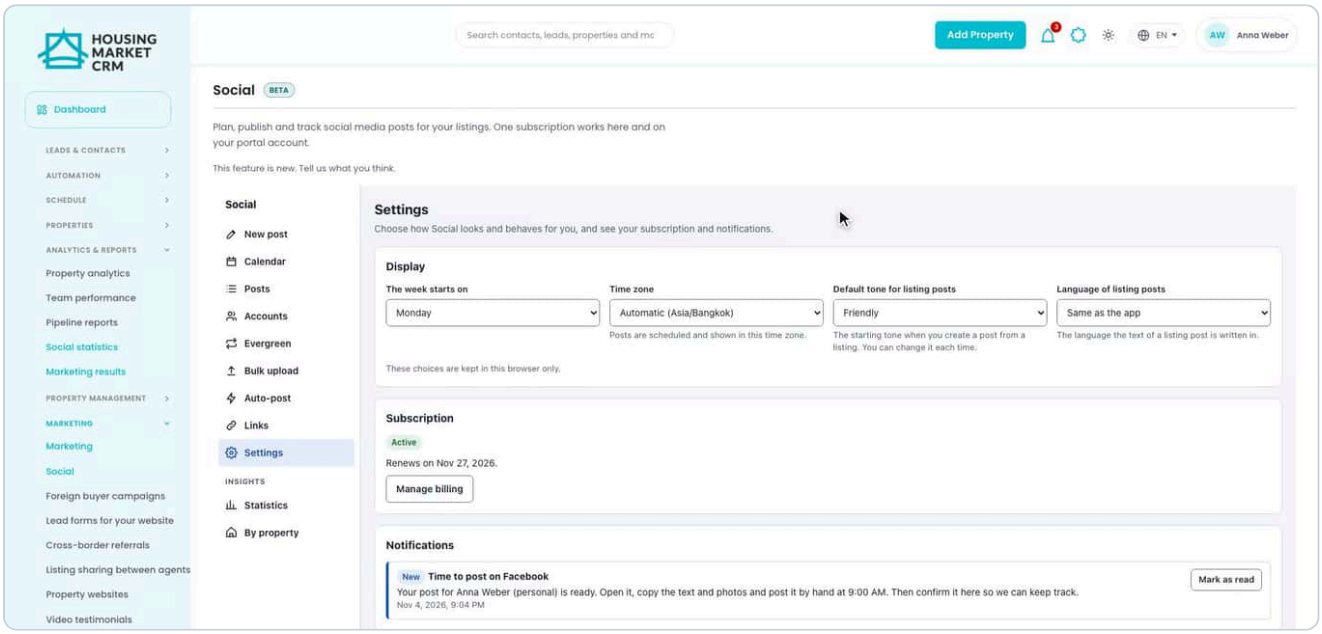


Figure 91.17 · Screen recorded 4 November 2026

18 At the scheduled time, **Notifications** carry your reminder.

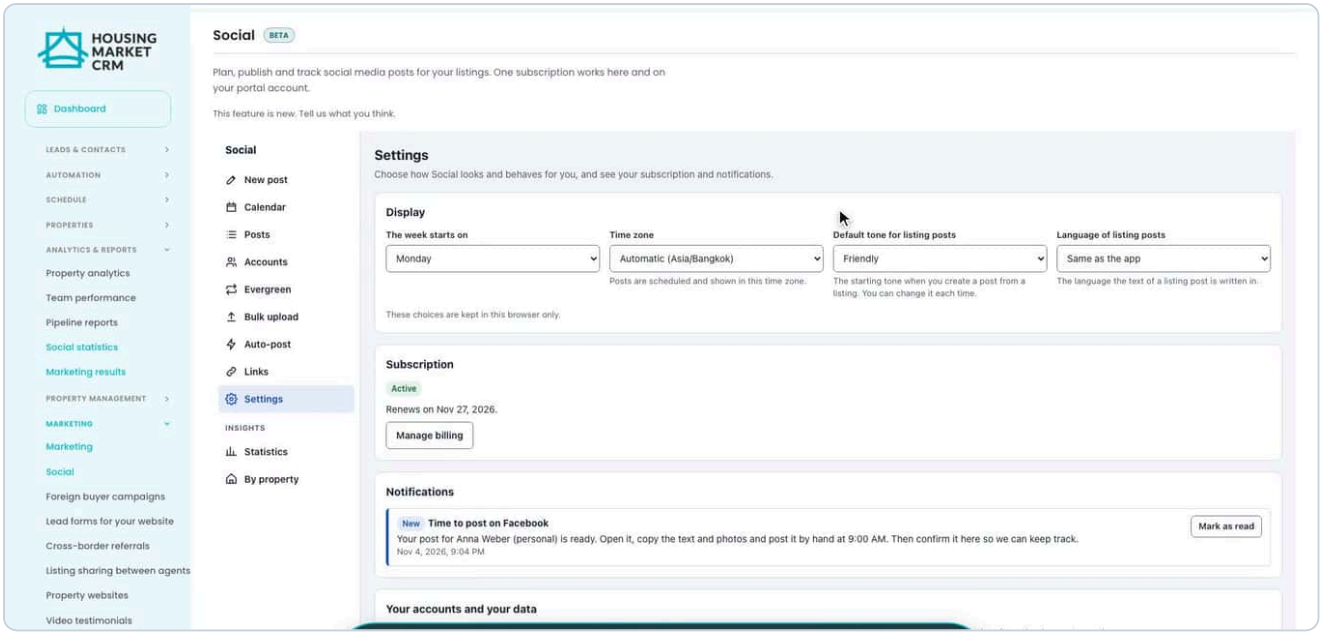


Figure 91.18 · Screen recorded 4 November 2026

19 **Time to post on Facebook**: copy the text and photos and **post it yourself**. It is sent **once**.

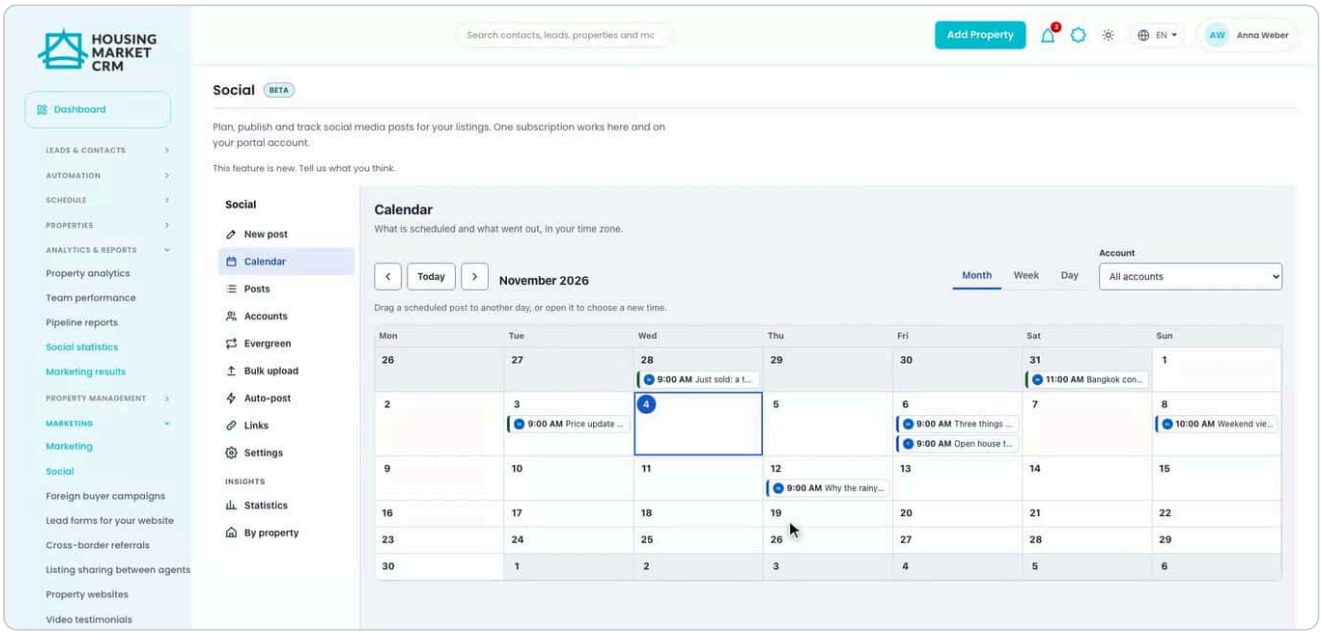


Figure 91.19 · Screen recorded 4 November 2026

20 Open **Calendar** to find the post.

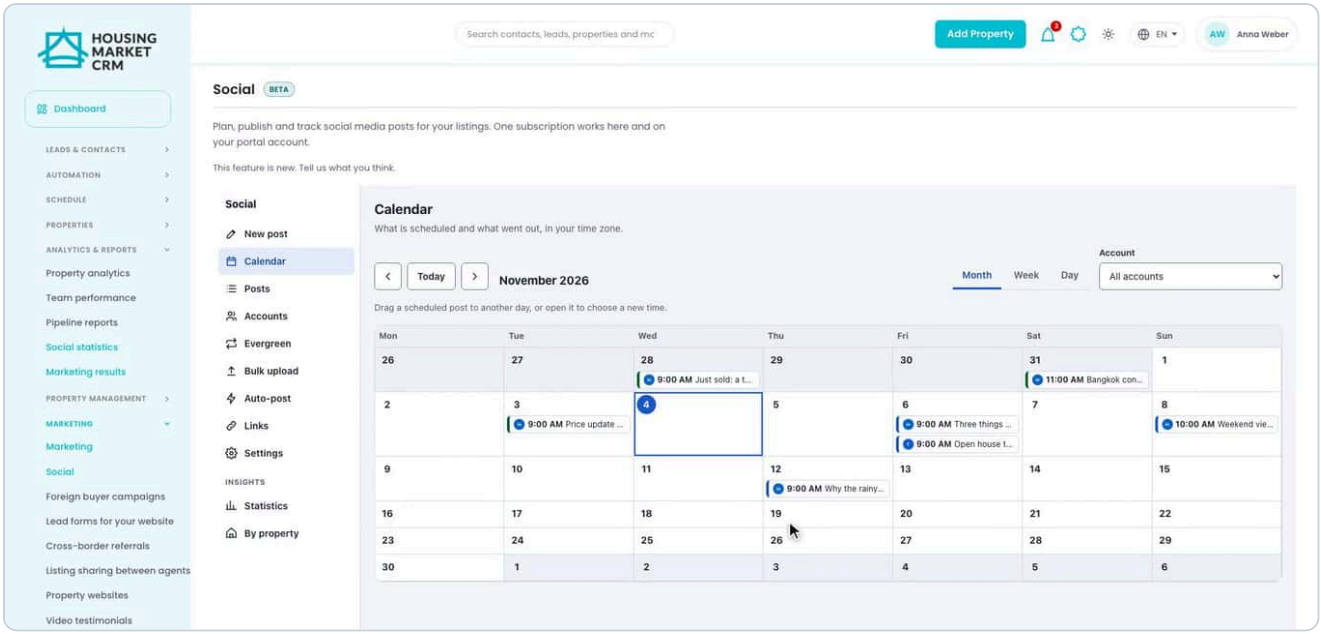


Figure 91.20 · Screen recorded 4 November 2026

21 Click the post.

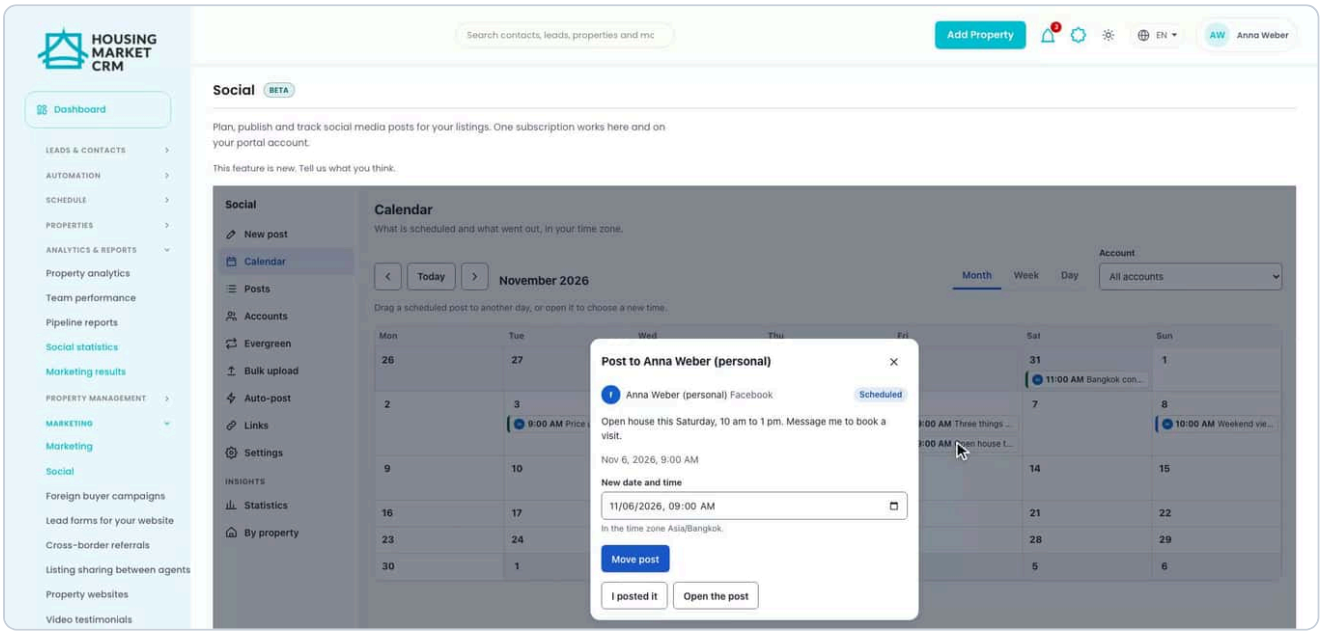


Figure 91.21 · Screen recorded 4 November 2026

22 After you post it, click **I posted it**.

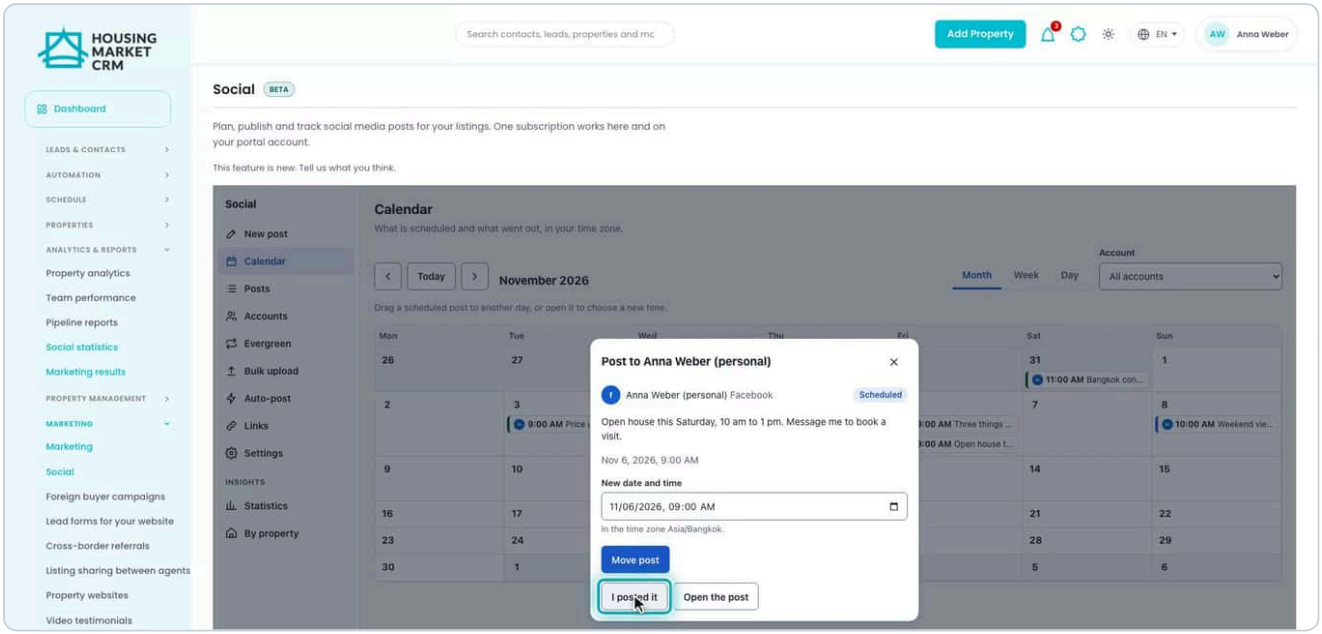


Figure 91.22 · Screen recorded 4 November 2026

23 Housing Market **never marks it posted by itself**.

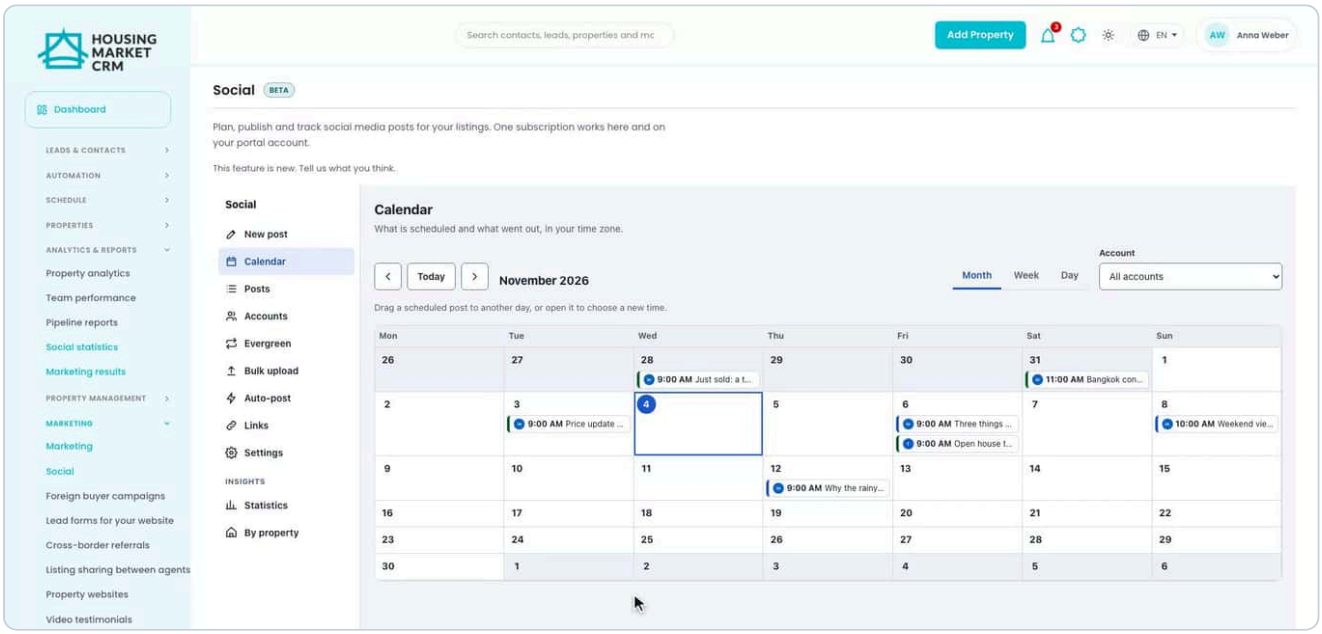


Figure 91.23 · Screen recorded 4 November 2026

24 **Marked as posted.** Nothing is marked posted until you say so.

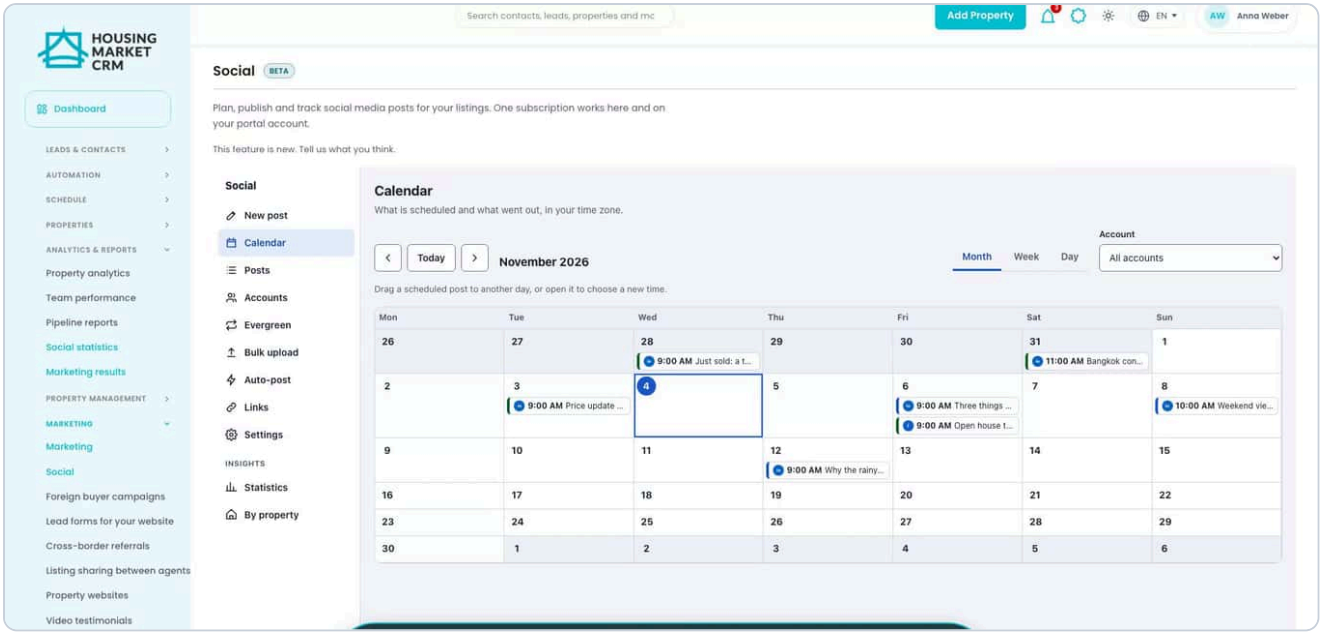


Figure 91.24 · Screen recorded 4 November 2026

PART 7

Deals, documents and reports

92 Commission tracking

93 Pipeline reports

94 Client documents

95 The compliance register

96 Lease reminders

97 The client portal

98 Your profile and reviews

99 Deals, forecast and statements

100 Send a contract for signing by email

101 Send an uploaded PDF for signature

102 Email yourself a report

103 Apply for Verified Agent status

92 CHAPTER 92

Commission tracking

Business | For office managers | Watch the video

OVERVIEW

Yes. Recording a deal, its value and its commission is part of Pro; dividing the commission between people, the forecast and the commission statement are part of Business.

Each deal records the property, its value, the commission due — a rate on the value or a flat fee — and how that commission is split between the people who worked it. A split must add up to the whole commission or it is refused, and only agents you can already see in your office can be named on it; anyone else is recorded as an outside party.

A deal moves through Pending, Won, Invoiced and Paid, or is marked Lost, so the office can answer what each person is owed and when. Nothing moves out of Paid, and a lost deal can be brought back to Pending if it comes alive again.

The pipeline forecast is built from the open deals and their expected close dates. It is calculated fresh every time you open it, so a deal closed a minute ago is already reflected rather than waiting for an overnight update. Each currency is forecast on its own and never added to another.

Recording deals and carrying them through to closing is part of Pro and Business. The commission split, the Forecast tab and the Statement tab are part of Business. See "How do I turn a lead into a deal?" and "How do I invoice a deal, and who is owed what?".

From the Help Center: **Can I track commission and forecast my pipeline?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

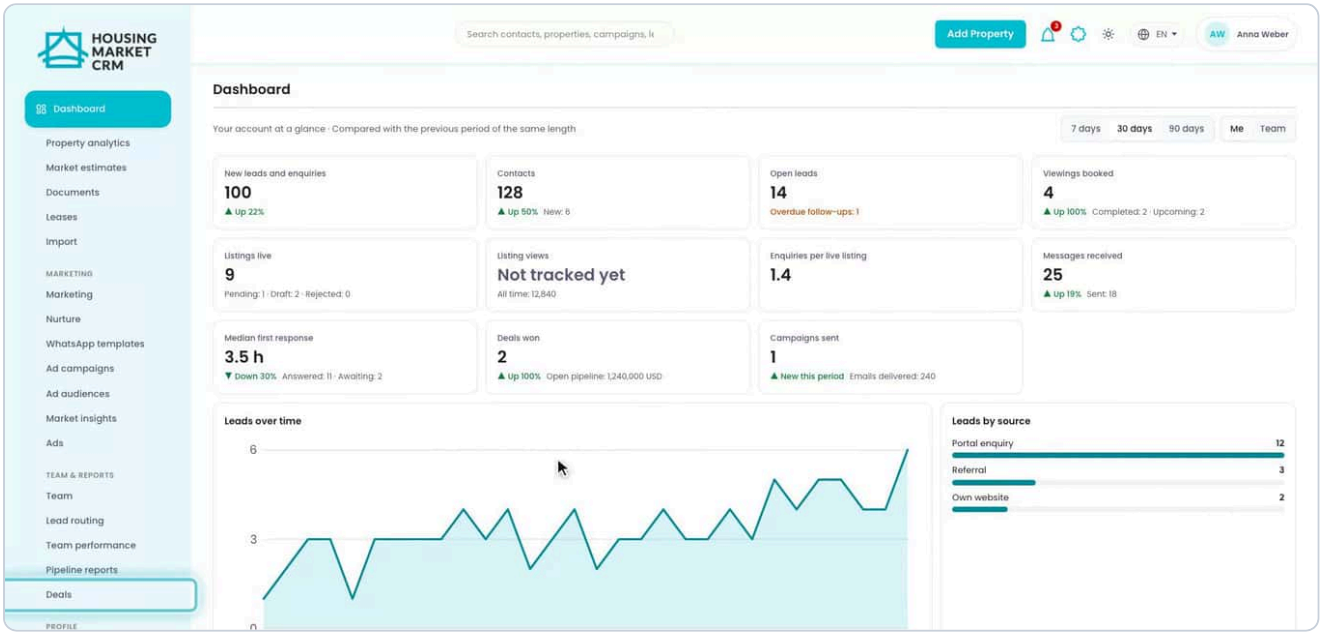


Figure 92.1 · Screen recorded 17 September 2026

2 Click **Deals** in the left menu.

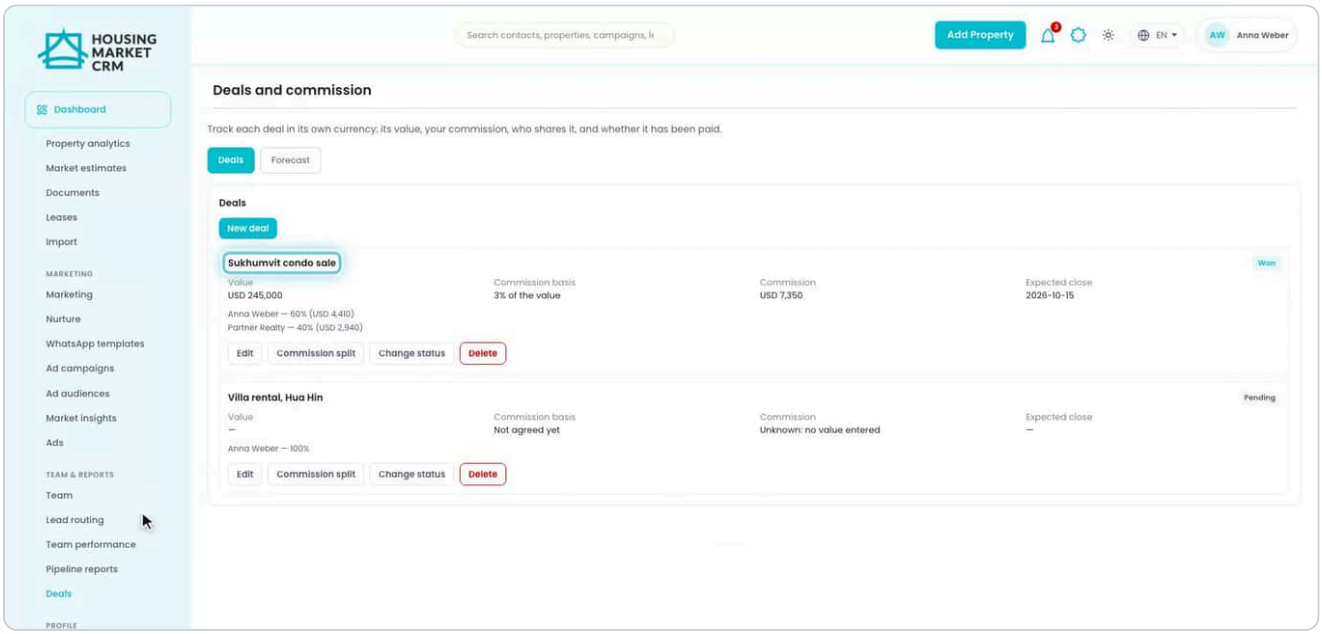


Figure 92.2 · Screen recorded 17 September 2026

3 Each deal shows its **value**, **commission** and **split**.

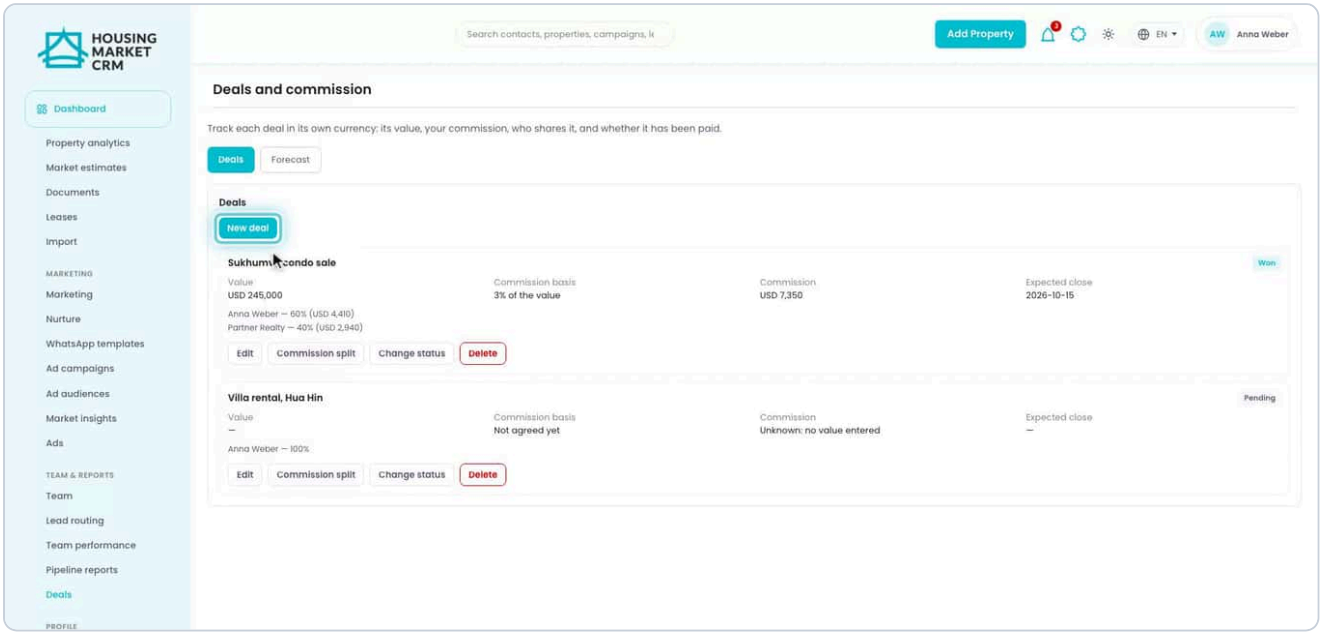


Figure 92.3 · Screen recorded 17 September 2026

4 Click **New deal**.

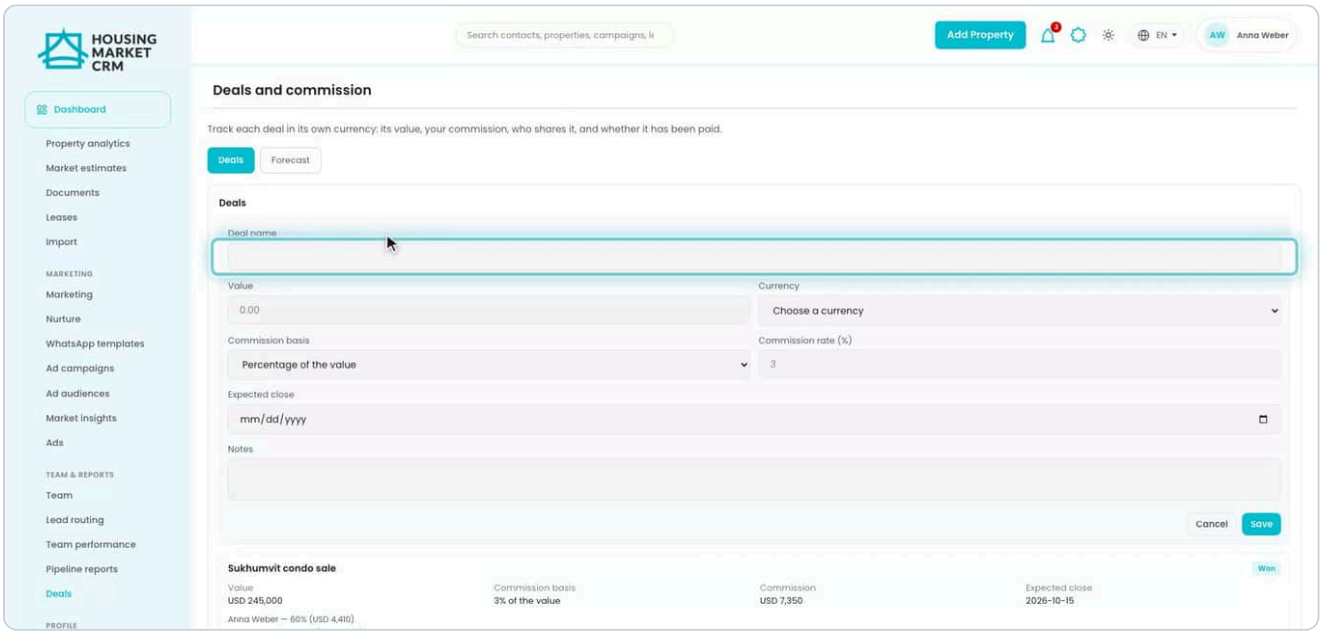


Figure 92.4 · Screen recorded 17 September 2026

5 Give the deal a **name**.

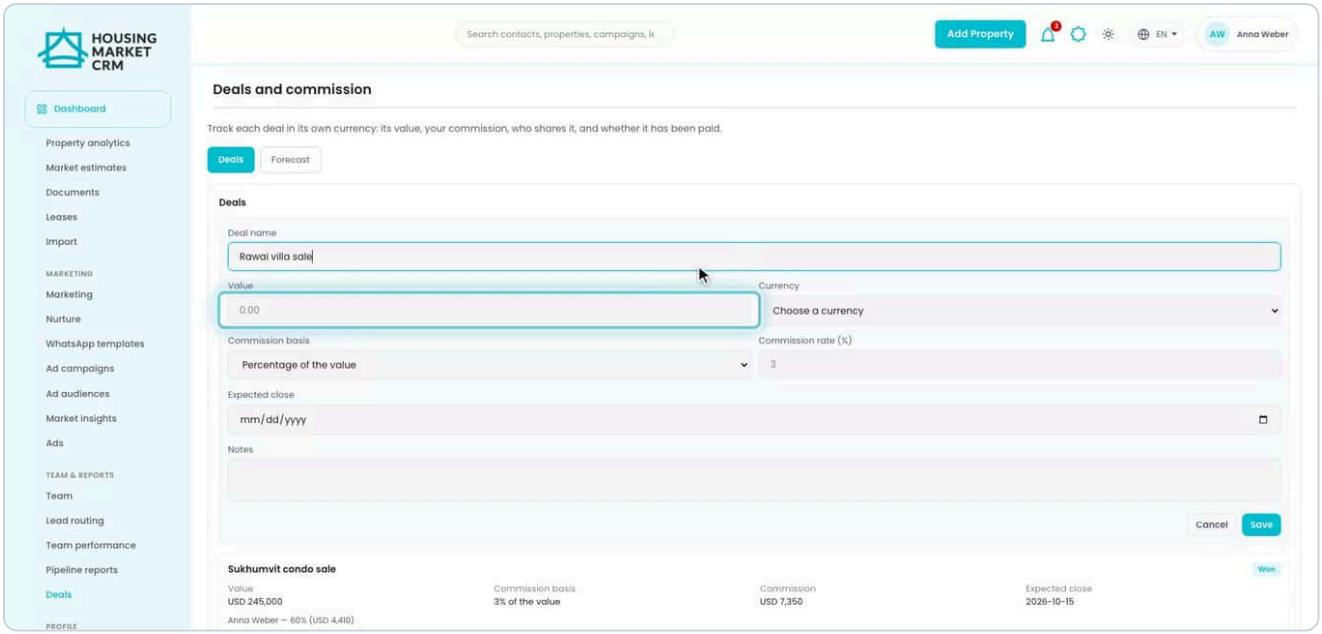


Figure 92.5 · Screen recorded 17 September 2026

6 Enter the **value**.

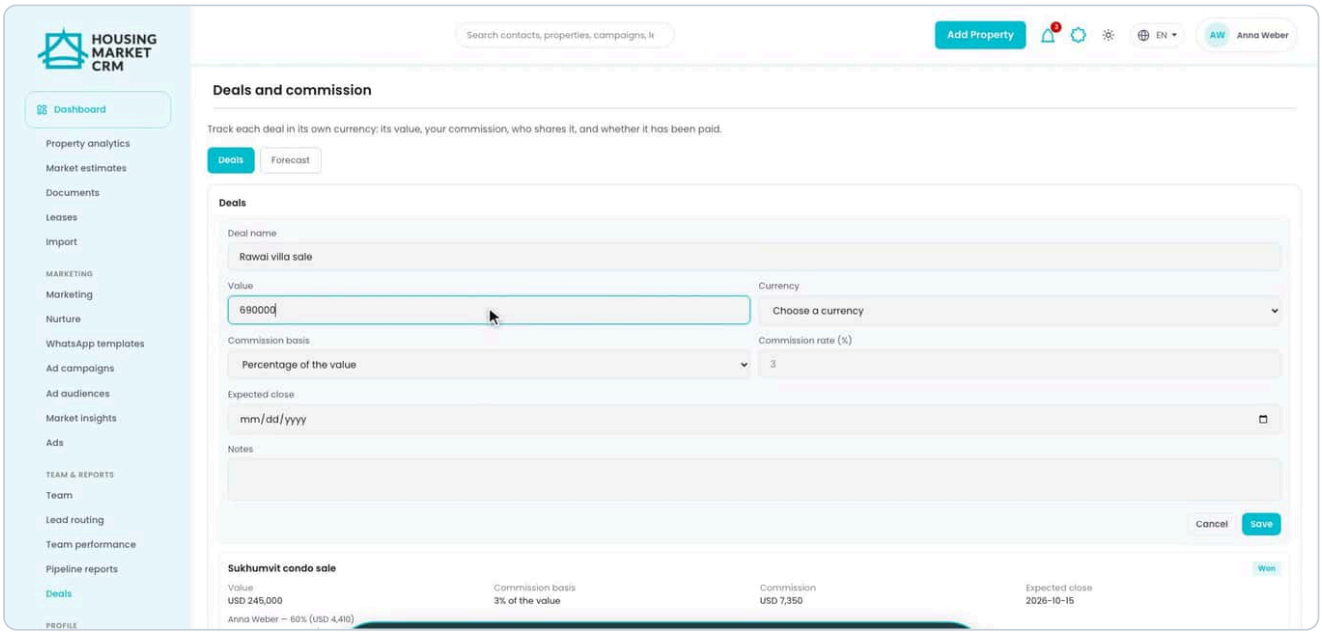


Figure 92.6 · Screen recorded 17 September 2026

7 Set the **currency**, **commission basis** and **expected close**.

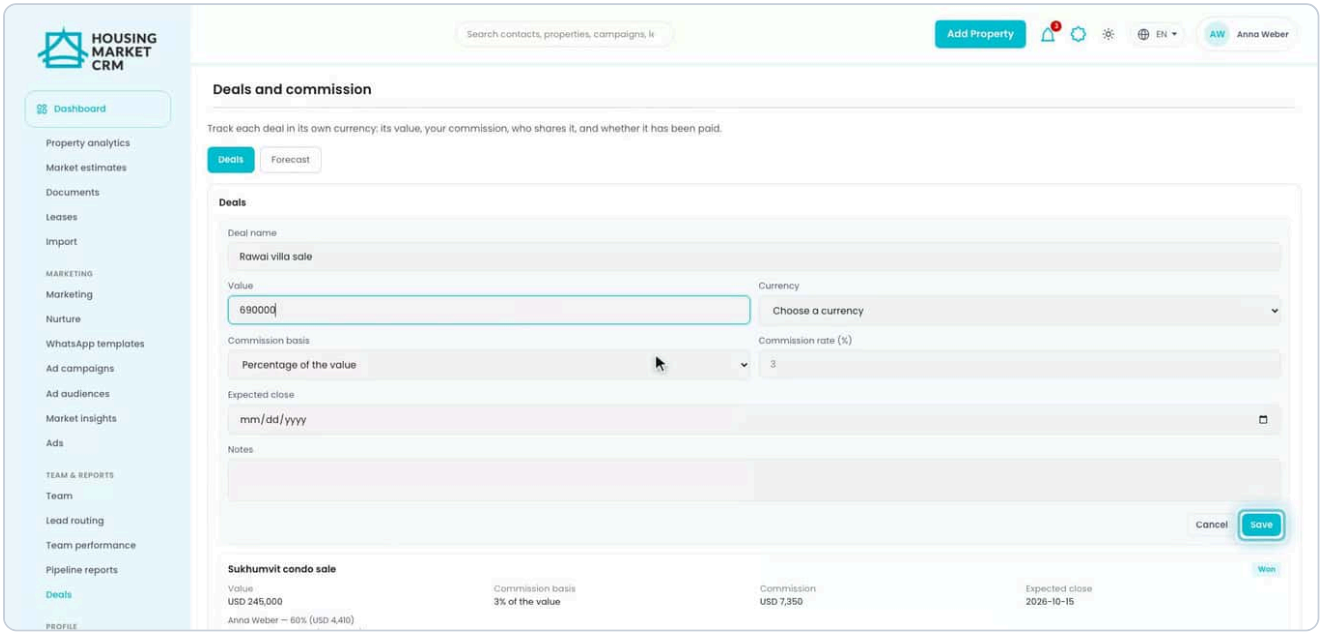


Figure 92.7 · Screen recorded 17 September 2026

8 Save the deal.

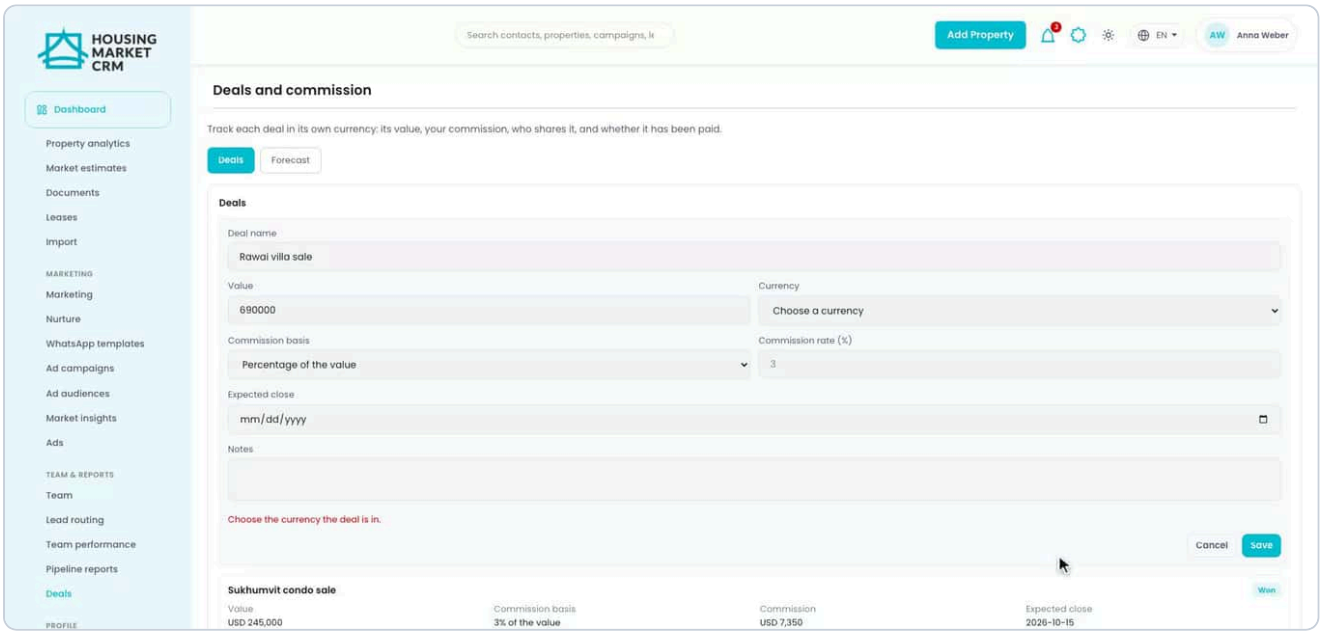


Figure 92.8 · Screen recorded 17 September 2026

9 Use **Commission split** to share it with others.

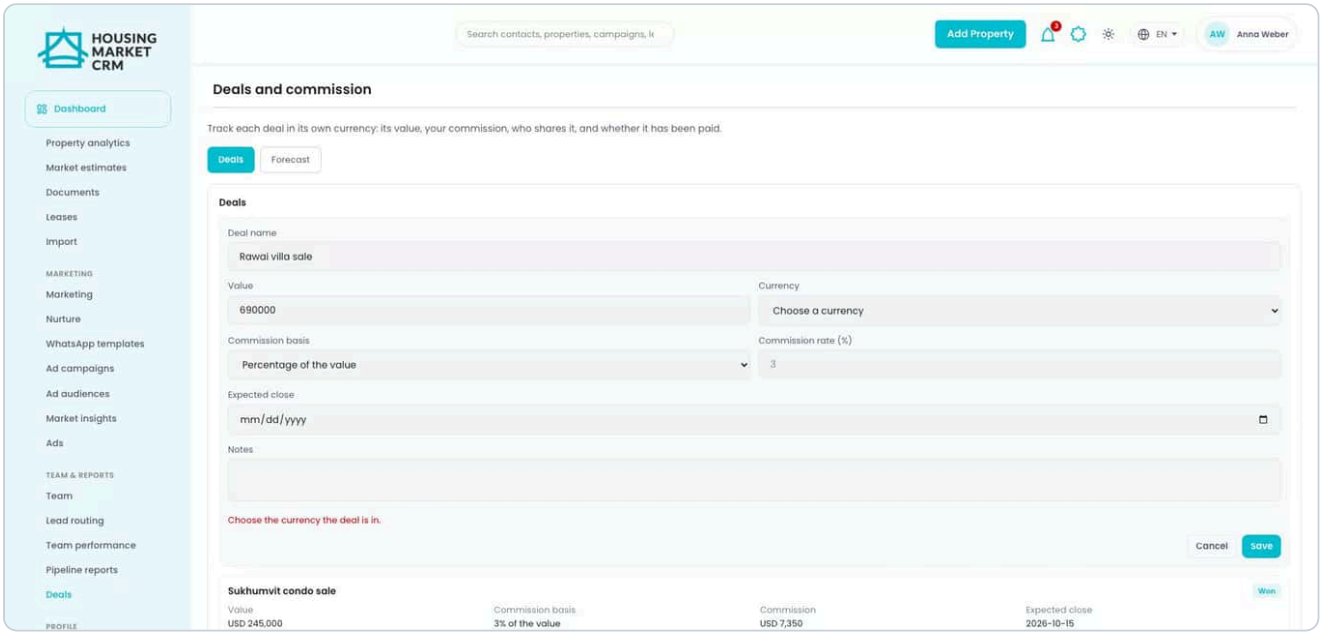


Figure 92.9 · Screen recorded 17 September 2026

10 **Change status** as the deal moves on.

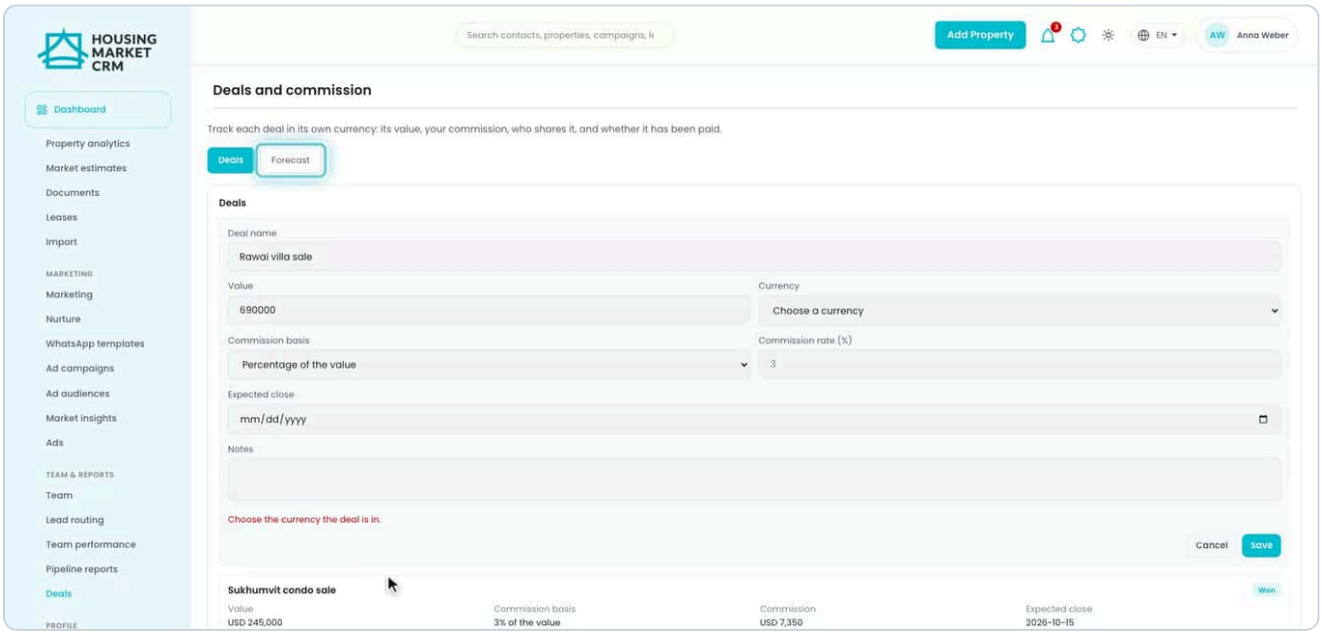


Figure 92.10 · Screen recorded 17 September 2026

11 Open **Forecast** to see what should close, and when.



Figure 92.11 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

How do I turn a lead into a deal?	faq.housingmarketgroup.com/faq/how-do-i-turn-a-lead-into-a-deal
How do I invoice a deal, and who is owed what?	faq.housingmarketgroup.com/faq/how-do-i-invoice-a-deal-and-who-is-owed-what
What is the checklist on a deal?	faq.housingmarketgroup.com/faq/what-is-the-checklist-on-a-deal

93 CHAPTER 93

Pipeline reports

Pro and Business | For agents | Watch the video

OVERVIEW

On Pro, Pipeline reports show which lead sources turn into deals, how far leads get through your board and how fast they are answered. On Business they add where your deals stand and why they were won or lost.

Choose Pipeline reports in the left menu and pick the period: the last 30, 90 or 365 days.

On Pro

- Lead source to deal — for each source, its leads, how many closed, the conversion, the deals and the commission on won deals.
- Conversion by stage — for each agent, the leads created in the period, counted at the furthest stage they reached: showing, negotiating, closed or lost. Each percentage is the share of the stage before.
- Response time — the median first response, the share answered within an hour and within a day, and the leads not answered yet.

On Business

- Deals by stage — your deals in Offer, Agreed, Contracts and Completed, with their value, commission and weighted commission. Under Place deals in the pipeline, choose the stage for each deal.
- Why deals are won and lost — the reasons recorded for closed deals, such as price, location or financing. Choose the reason for each closed deal in the same list.

On the free plan, these sections are shown locked.

From the Help Center: **What do pipeline reports show?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

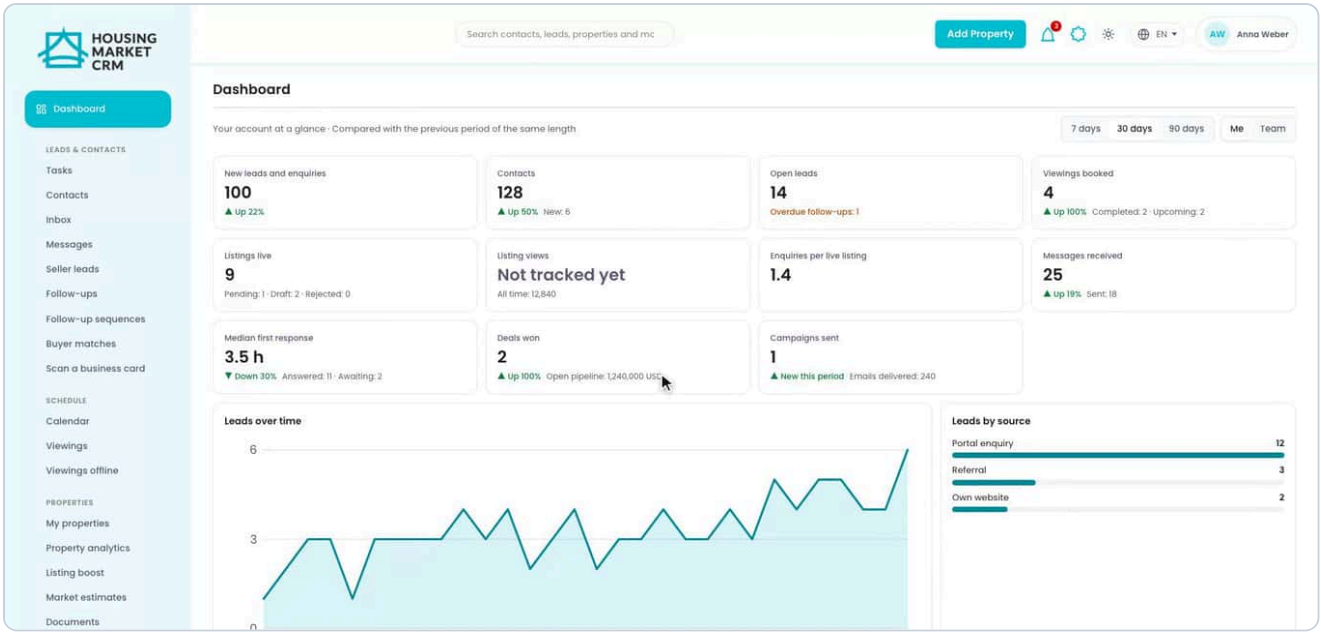


Figure 93.1 · Screen recorded 8 October 2026

2 Click **Pipeline reports** in the left menu.

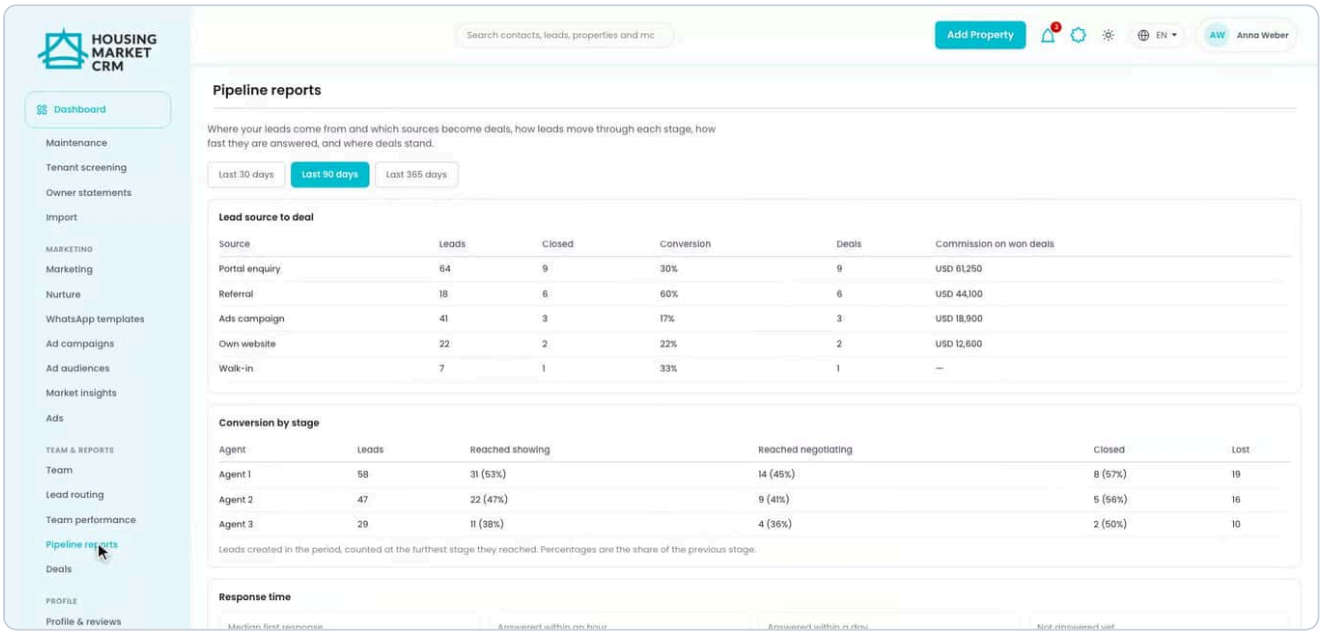


Figure 93.2 · Screen recorded 8 October 2026

3 A month of data is mostly noise — use **90 days**.

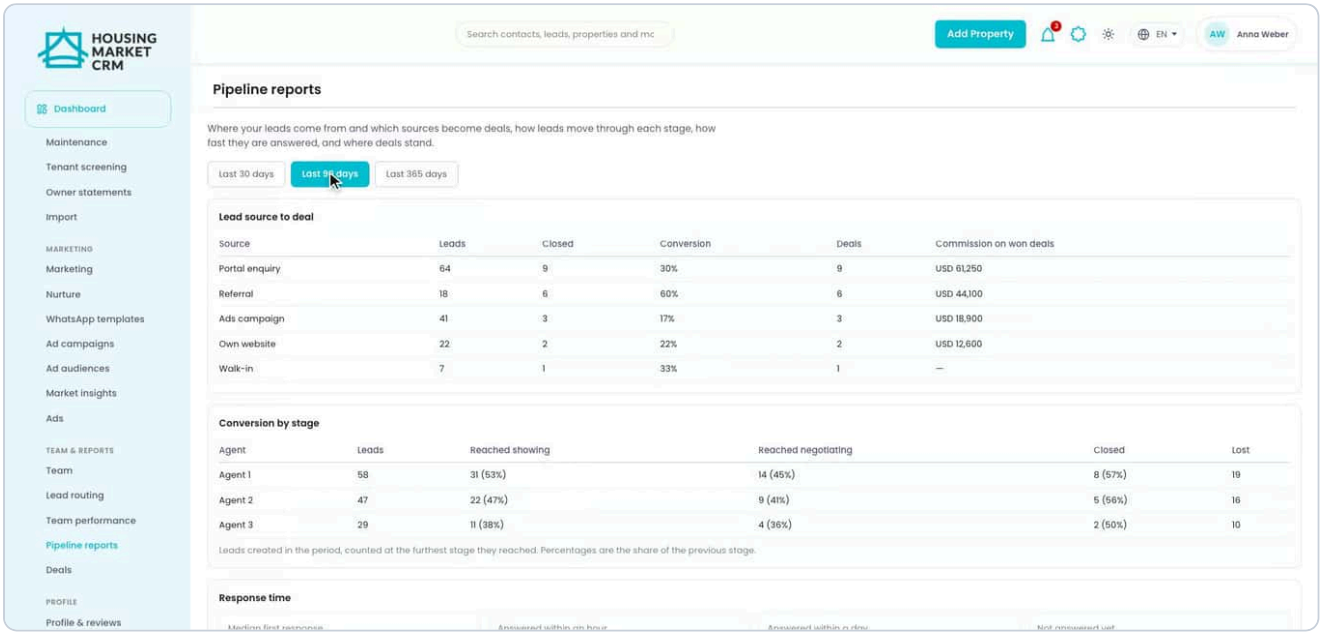


Figure 93.3 · Screen recorded 8 October 2026

4 Not lead counts — which sources **become deals**.

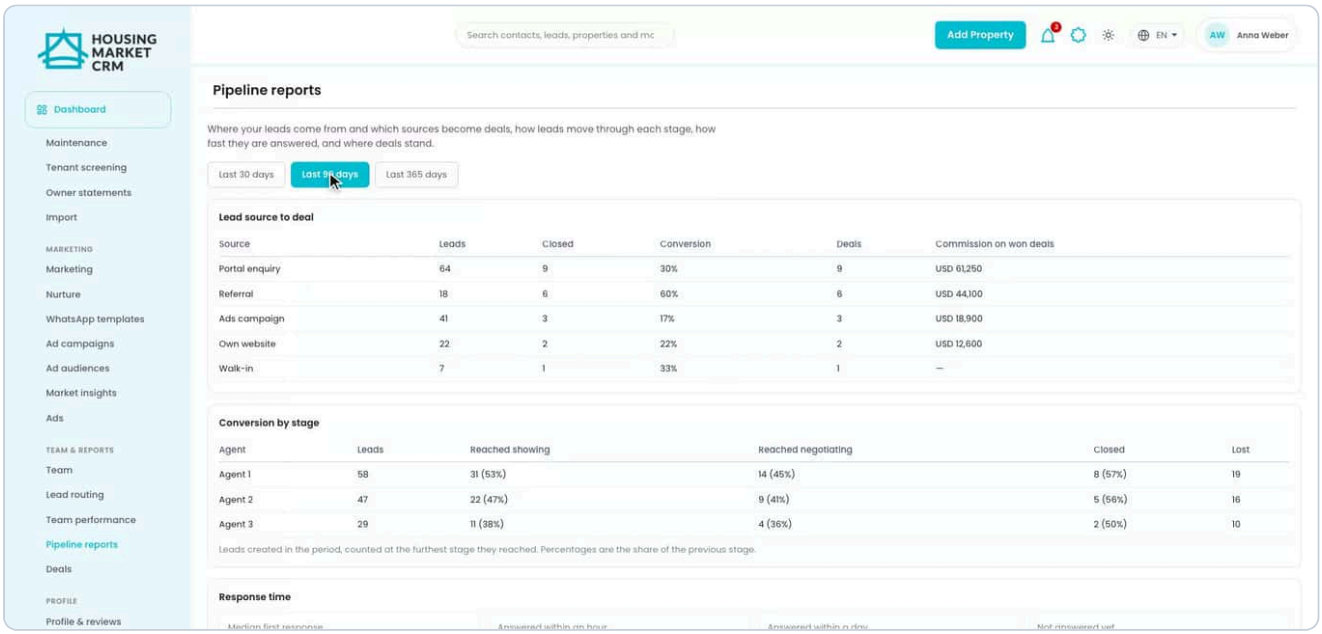


Figure 93.4 · Screen recorded 8 October 2026

5 **Conversion by stage**: where the board stops moving.

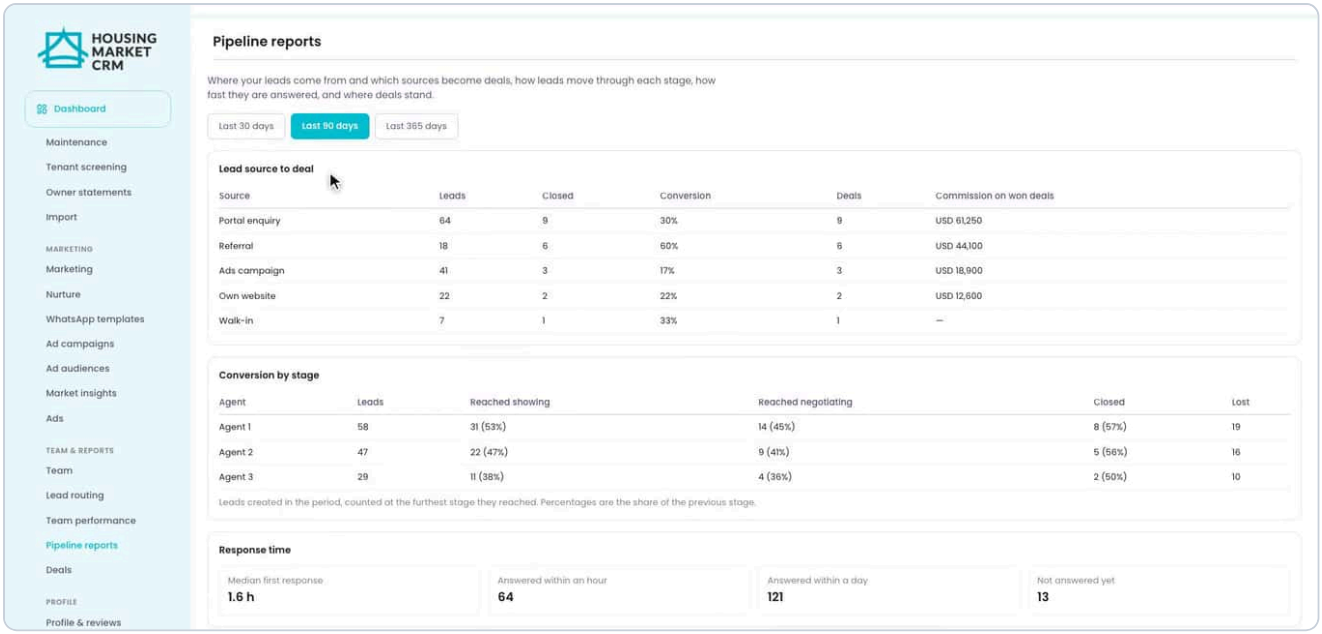


Figure 93.5 · Screen recorded 8 October 2026

6 **Response time** — the one number you can change this week.

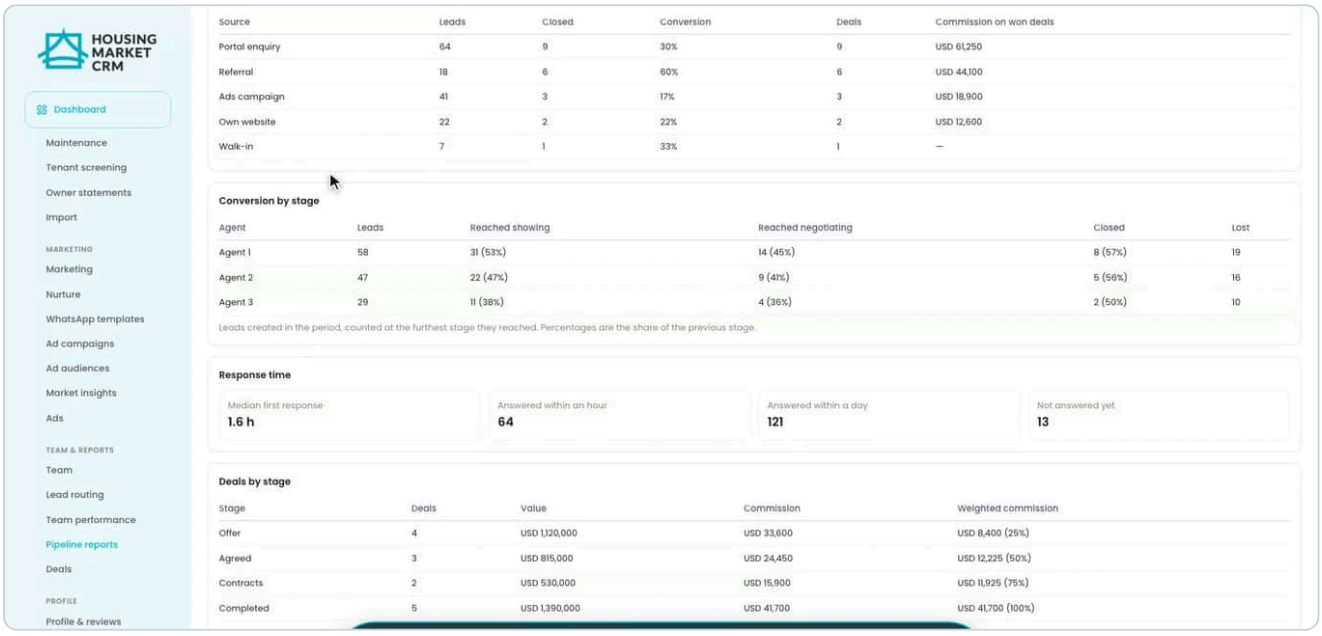


Figure 93.6 · Screen recorded 8 October 2026

7 **Deals by stage**: where the money stands.

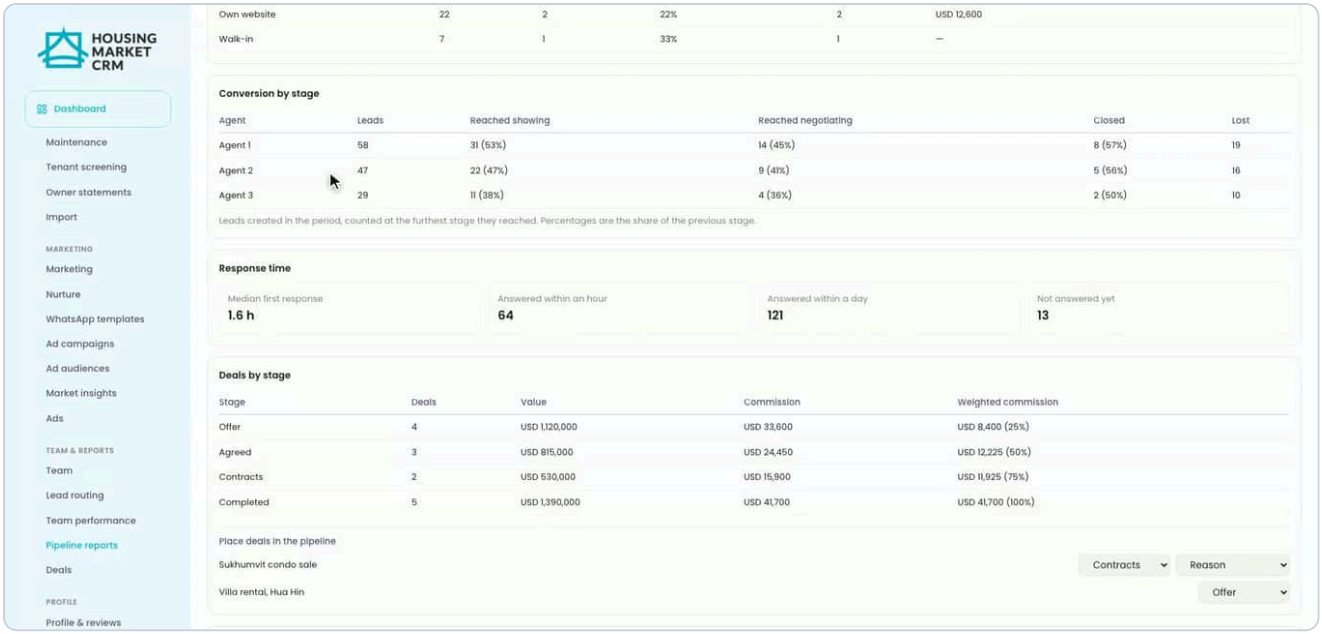


Figure 93.7 · Screen recorded 8 October 2026

8 And **why** deals were won and lost.

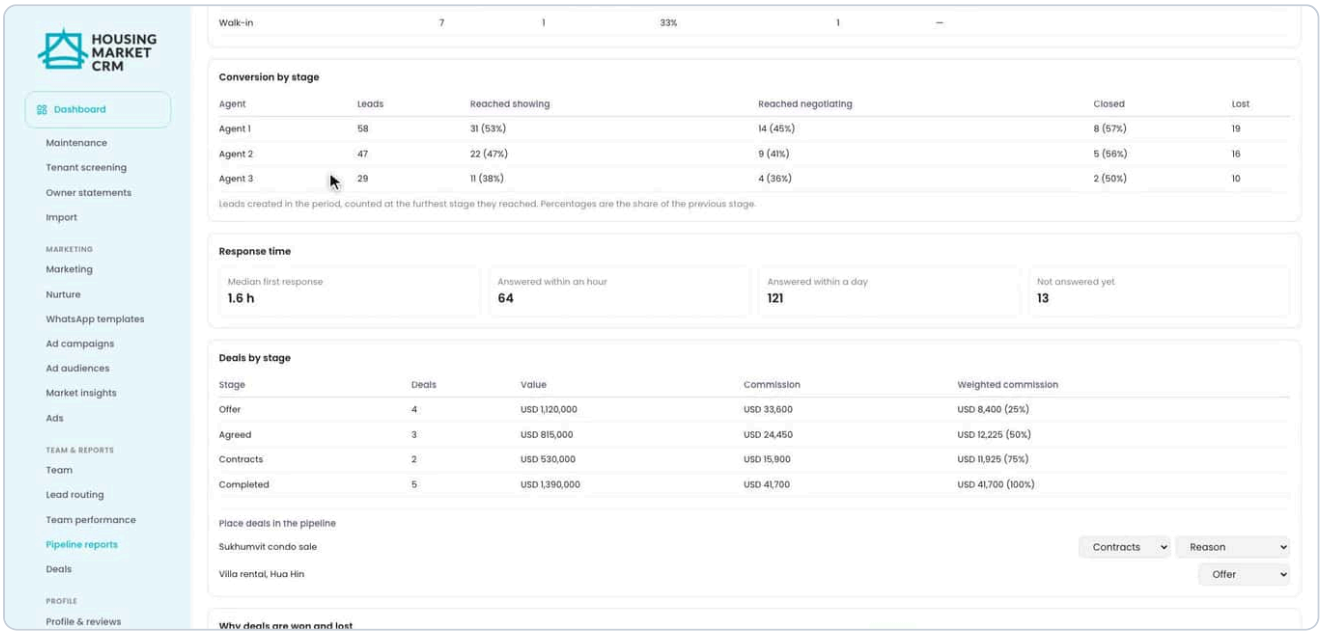


Figure 93.8 · Screen recorded 8 October 2026

9 A source sending a hundred enquiries and no buyers is **costing** you money.

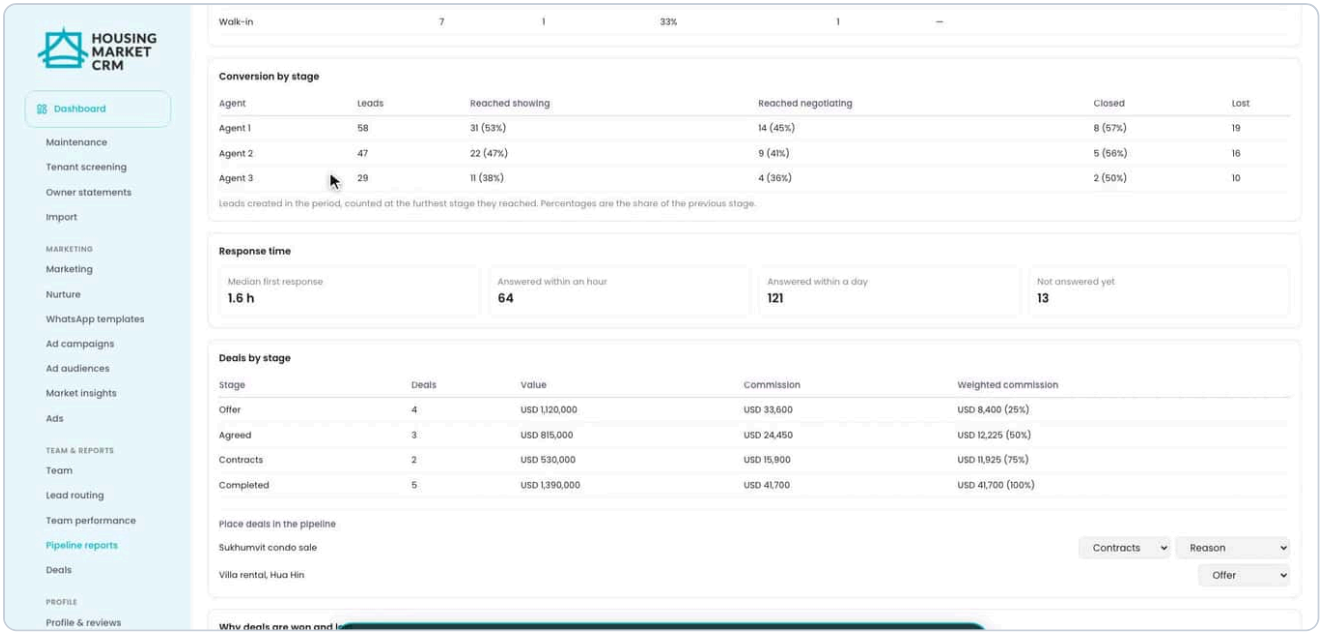


Figure 93.9 · Screen recorded 8 October 2026

10 Response time is the one you can change **this week**.

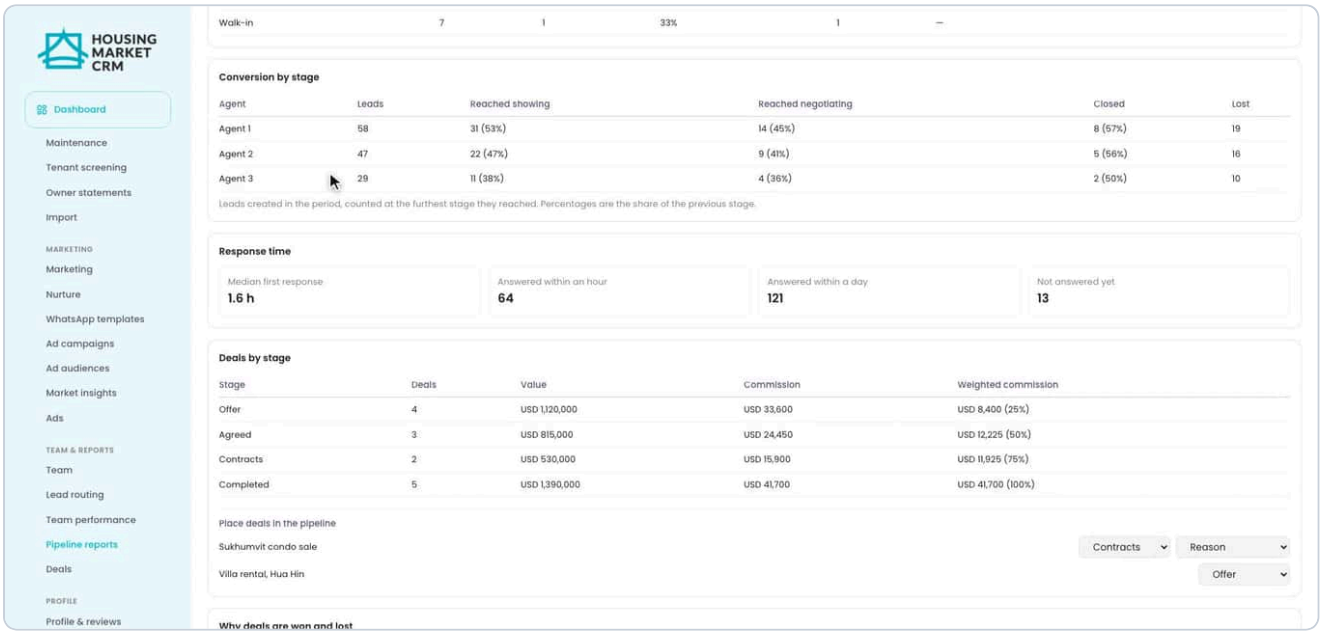


Figure 93.10 · Screen recorded 8 October 2026

RELATED HELP CENTER ARTICLES

Can I monitor my performance?	faq.housingmarketgroup.com/faq/can-i-monitor-my-performance
Can I track commission and forecast my pipeline?	faq.housingmarketgroup.com/faq/can-i-track-commission-and-forecast-my-pipeline

94 CHAPTER 94

Client documents

All plans | For agents | Watch the video

OVERVIEW

Every plan has a document vault on contacts and listings with expiry reminders. Pro adds contracts from your templates — signed on screen, or sent to be signed remotely by somebody with no CRM account — and lease records that remind you before a lease ends.

Document vault

Keep documents against a contact, a listing or a lease, with an expiry date if they have one, and the CRM reminds you before it passes. Agents archive documents; deleting takes a manager with the right to, and a signed document cannot be deleted by anyone.

Contracts, on Pro

Generate a contract from one of your own templates and have it signed on screen. Each signature is tied to the exact text shown to the signer, and once the first signature is on it, the text can no longer be edited, so everyone signs the same document.

A contract can also be sent to be signed remotely. Each party is emailed a private link that needs no account and no password, and signs in their own browser; the signature is bound to the same text in the same way. See "How do I send a document to be signed remotely?".

Leases, on Pro

Record what a landlord and tenant agreed and mark its status yourself. When an active lease is getting close to its end, the CRM raises a lead for the tenant, who is about to look for a new home, and a follow-up to ask the landlord whether to relist. Rent and deposit are recorded for reference only; the CRM never collects or converts money.

From the Help Center: **How do documents, contracts and leases work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

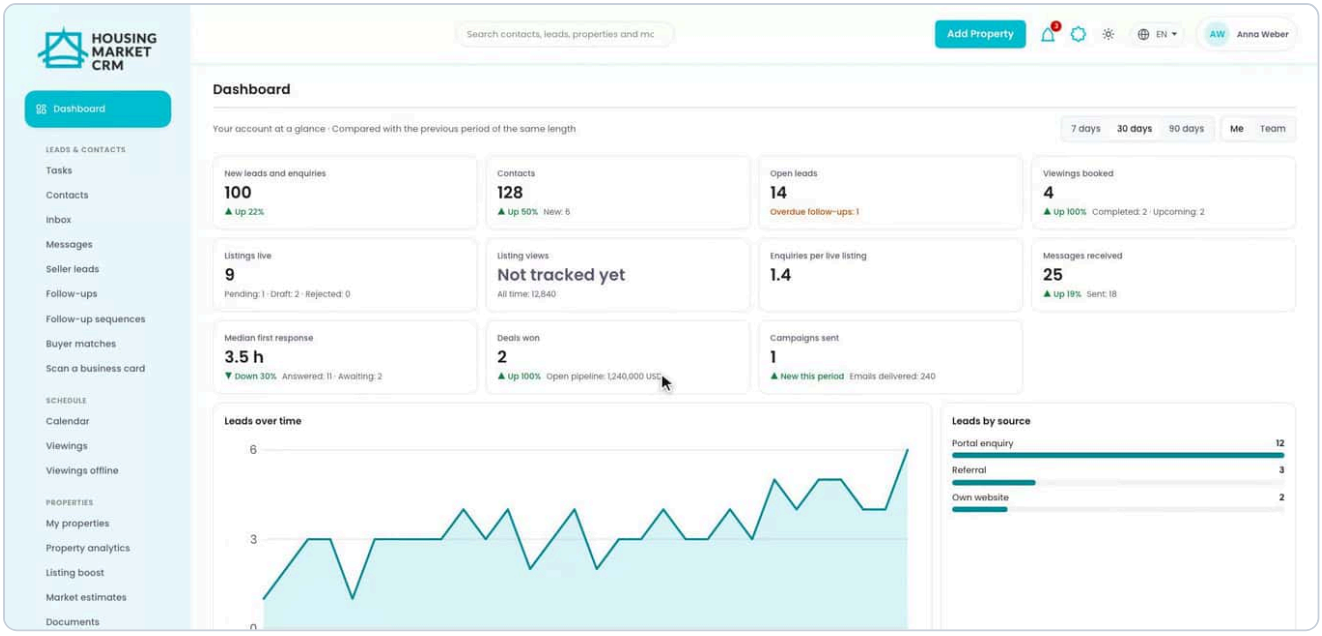


Figure 94.1 · Screen recorded 8 October 2026

2 Click **Documents** in the left menu.

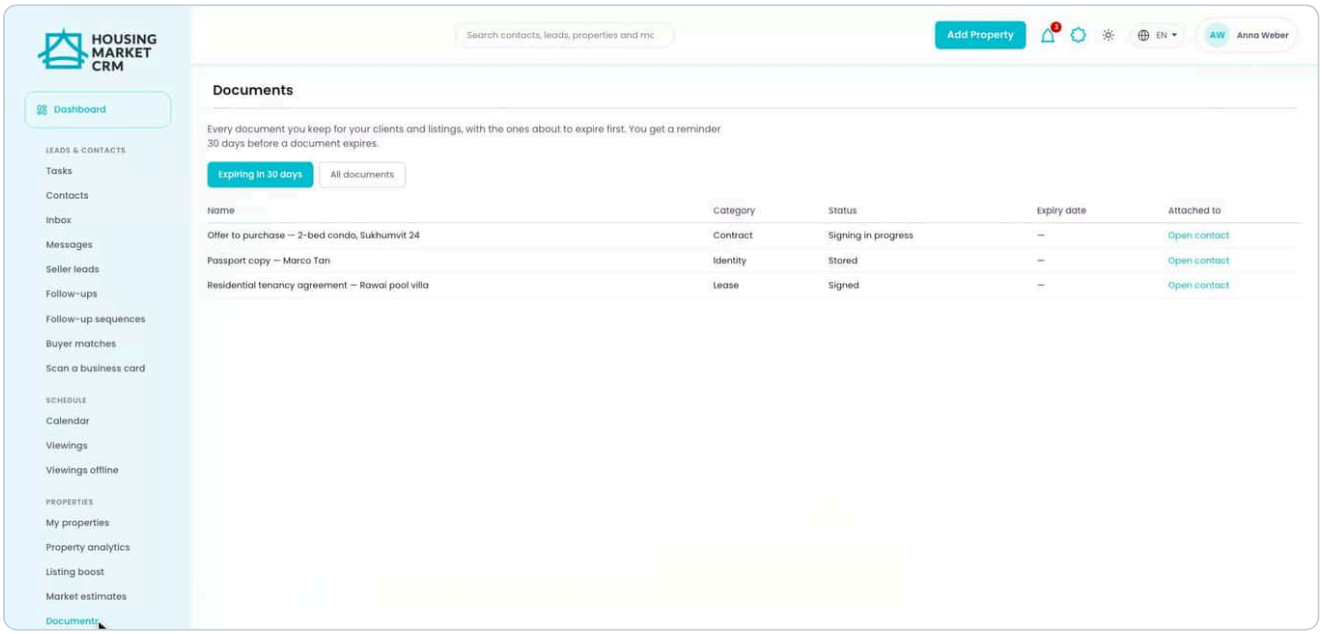


Figure 94.2 · Screen recorded 8 October 2026

3 Everything you keep for a **client** or a **listing**.

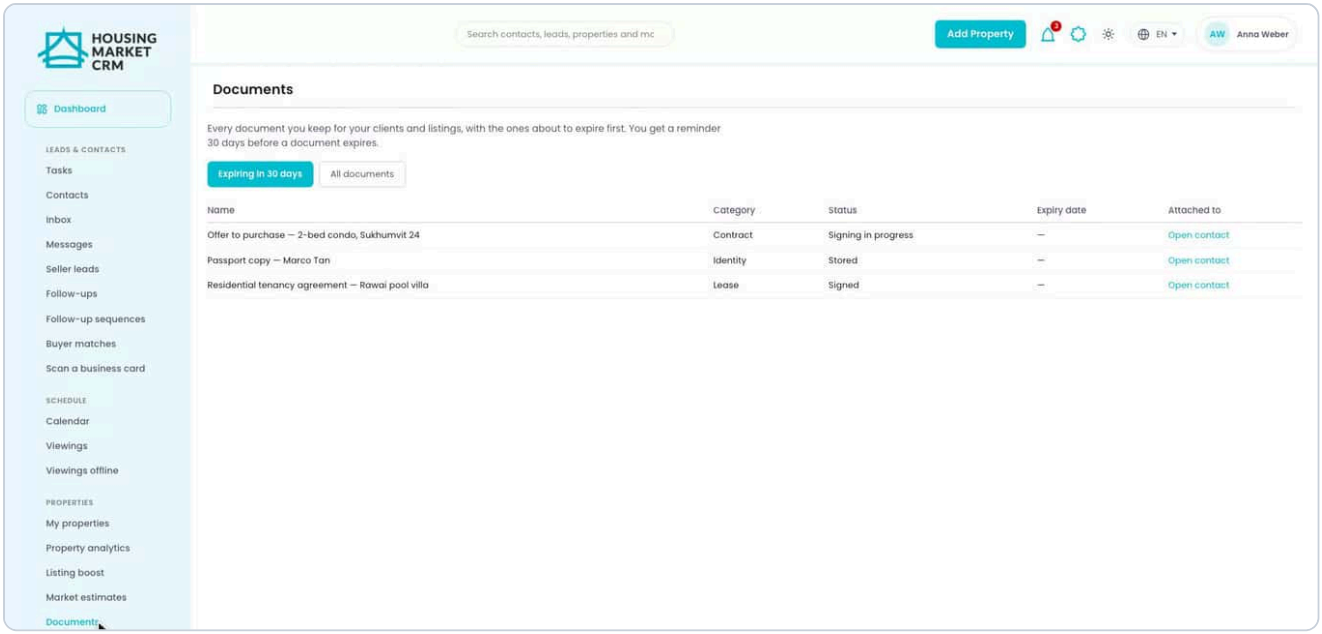


Figure 94.3 · Screen recorded 8 October 2026

4 Each row says what it is **attached to**.

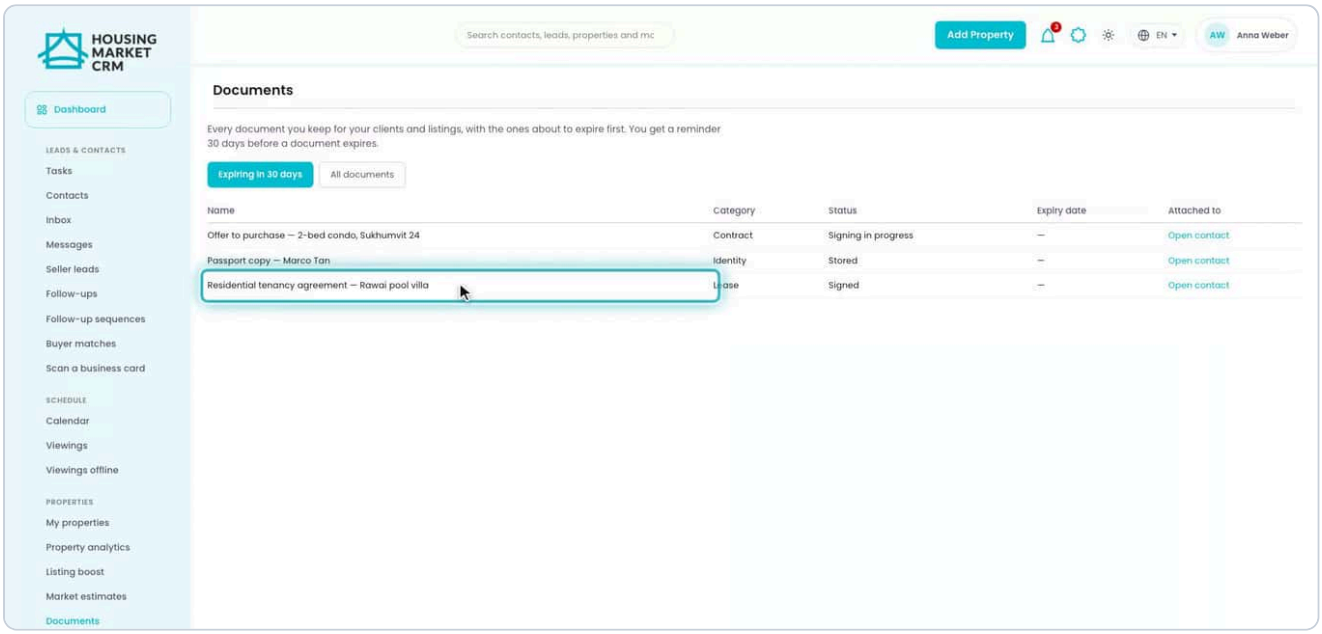


Figure 94.4 · Screen recorded 8 October 2026

5 **Expiring in 30 days** — and you are reminded before it lapses.

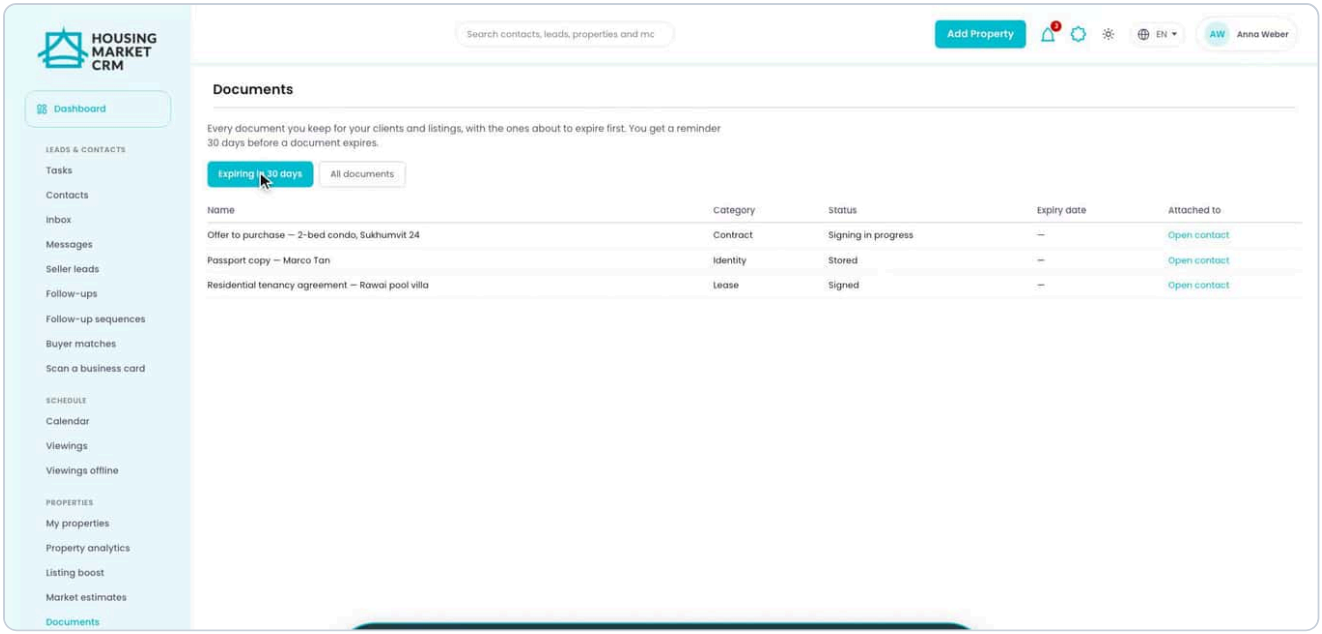


Figure 94.5 · Screen recorded 8 October 2026

6 Back to **All documents**.

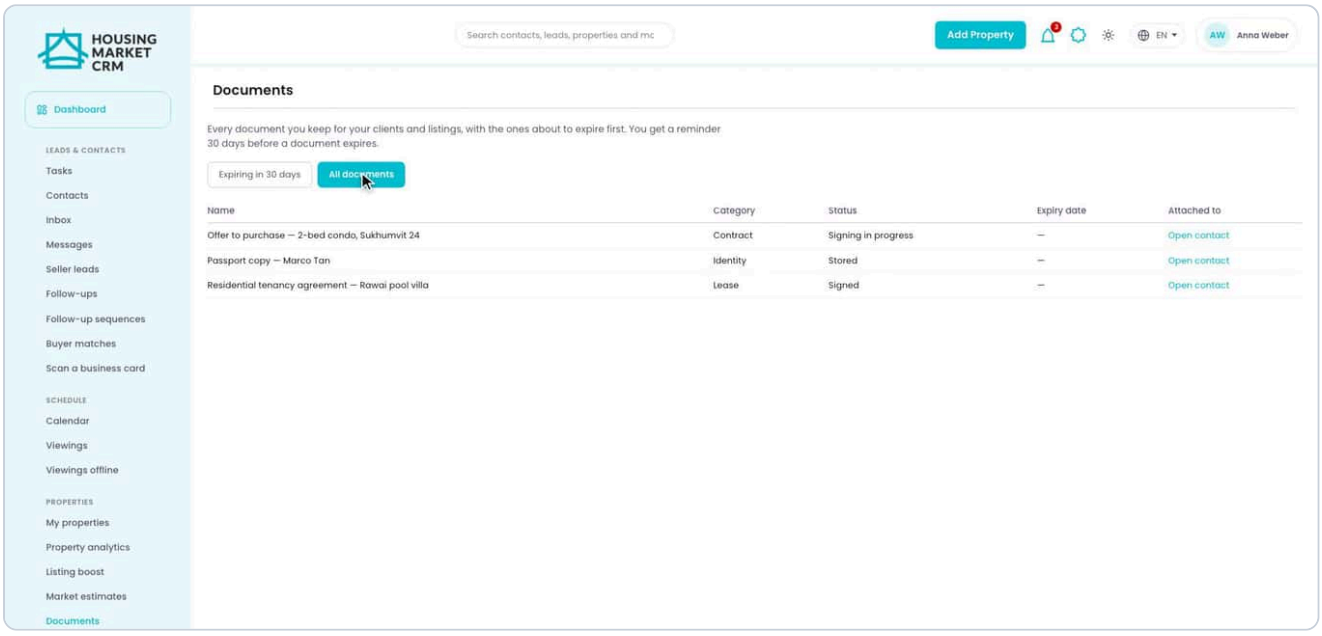


Figure 94.6 · Screen recorded 8 October 2026

7 A contract is built from a **template**, then signed.

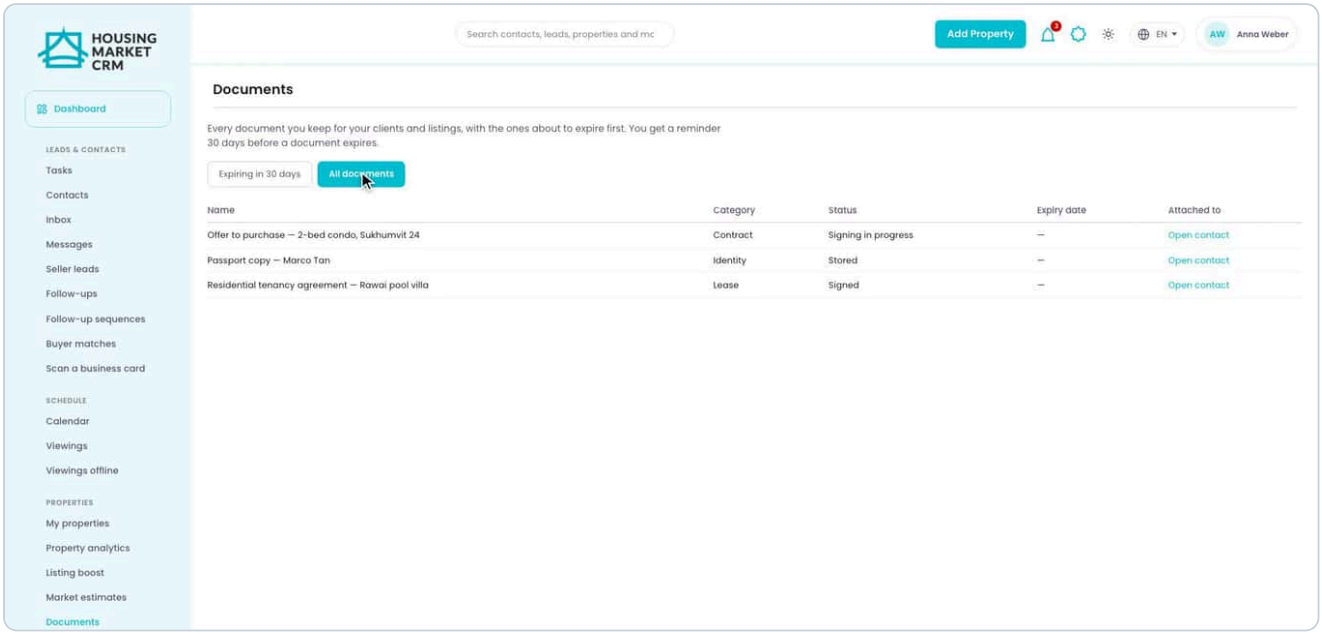


Figure 94.7 · Screen recorded 8 October 2026

8 Signing **in person** is for when the client is in front of you.

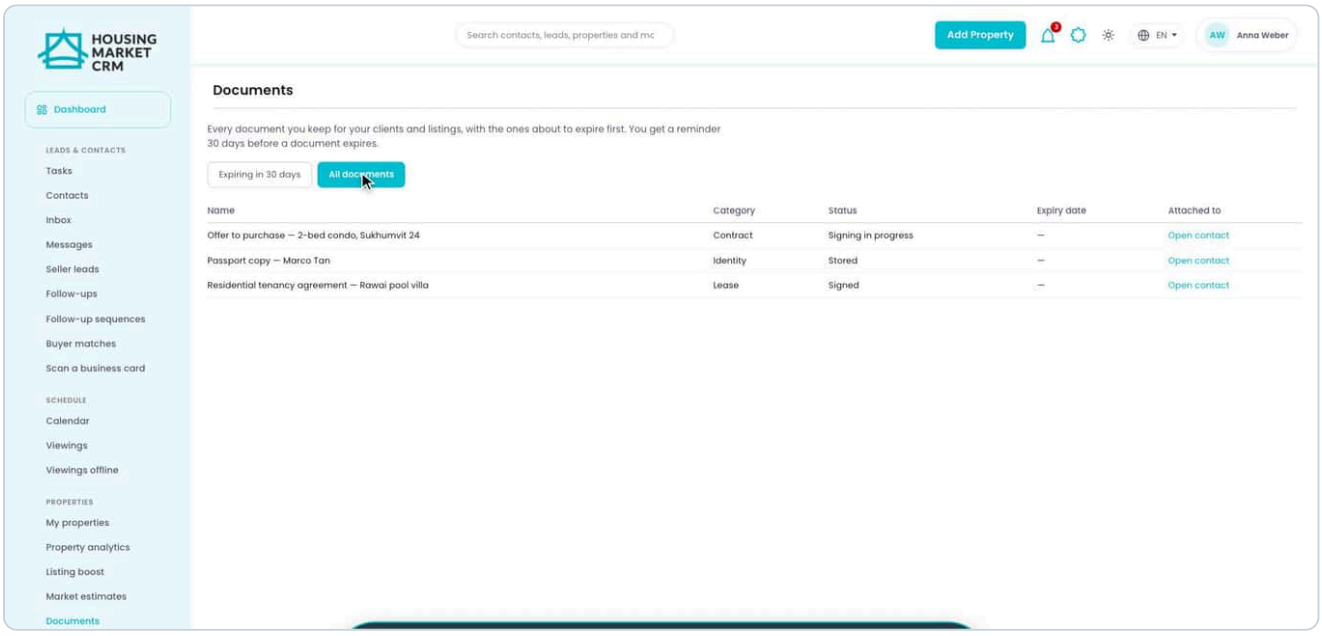


Figure 94.8 · Screen recorded 8 October 2026

GOOD TO KNOW

TIP

Open a contract and send it for signature. Each party is emailed a private link that needs no account and no password, and expires after fourteen days. They draw or type a signature; it is bound to the exact text they were shown. This is part of Pro.

Help Center: How do I send a document to be signed remotely?

95 CHAPTER 95

The compliance register

All plans | For agents | Watch the video

TODO Plan: the Help Center says "The register page itself is part of Business"; the video catalogue lists this task for all plans, so the chapter prints "All plans". Confirm the plan.

OVERVIEW

One list of everything your office holds that expires — certificates, licences, permits, insurance and identity documents — with what has lapsed and what lapses within 30 days. The page is part of Business; the reminders are not.

Choose Compliance in the menu, under Properties. The register answers one question — what has your office got that runs out, and when — in a single list, instead of leaving it to whoever remembers.

What it lists

It is a view over the documents you already store in the CRM, not a second place to file things. Every document that carries an expiry date and is a certificate, a licence, a permit, an insurance policy or an identity document appears here, soonest first. A document with no expiry date does not: the register is about dates, so a document without one has nothing to say to it.

Each row shows the document, what kind it is, the date it runs out and where it stands: Expired, Lapsing soon or In date. Above the list, a count of what has already expired and what lapses within the next 30 days. Nothing is stored as "expired" — it is worked out each time you open the page, because expired is a fact about today rather than about the last time a job ran.

The dates are printed exactly as they are stored, year first, so a licence that runs out on 1 March is never read as 3 January — which is what one date looks like when two offices write it in two conventions.

Adding something to it

There is nothing to add here, and nothing to edit. A document reaches the register by having an expiry date, which you set where you upload it — on a contact, a listing, a lease or a deal. Give it an Expiry date there and it appears in the register from then on.

When something lapses

Nothing is switched off, revoked or hidden. The row stays where it is, turns to Expired and is counted, so the office can see it and deal with it. The CRM emails a reminder 30 days before any document in your vault expires, and that reminder is not part of any plan: it arrives on the free plan too, because an ID card expiring quietly is not an acceptable consequence of a subscription ending.

The register page itself is part of Business. What each of these kinds is called, and which body issues it, differs from one of our markets to the next, so the CRM keeps them generic and lets the document's own name say which one it actually is.

From the Help Center: **What is the compliance register?**

STEP BY STEP

1. Open your **Housing Market CRM** account.

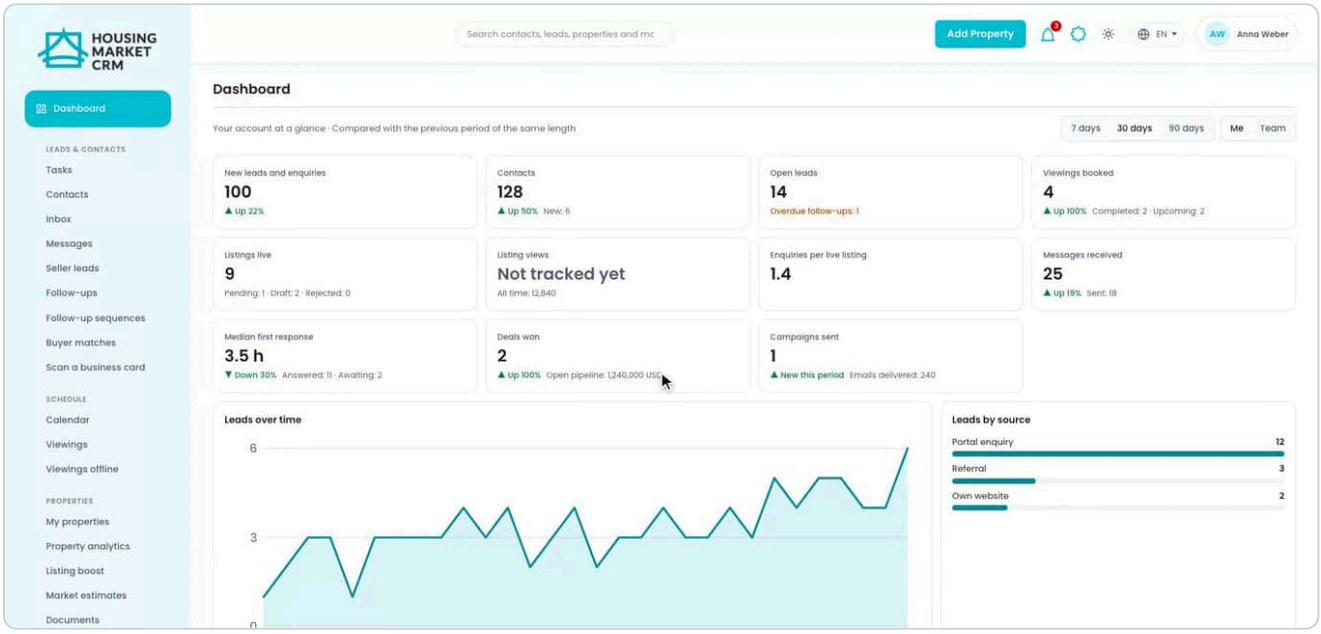


Figure 95.1 · Screen recorded 8 October 2026

2 Click **Compliance** in the left menu.

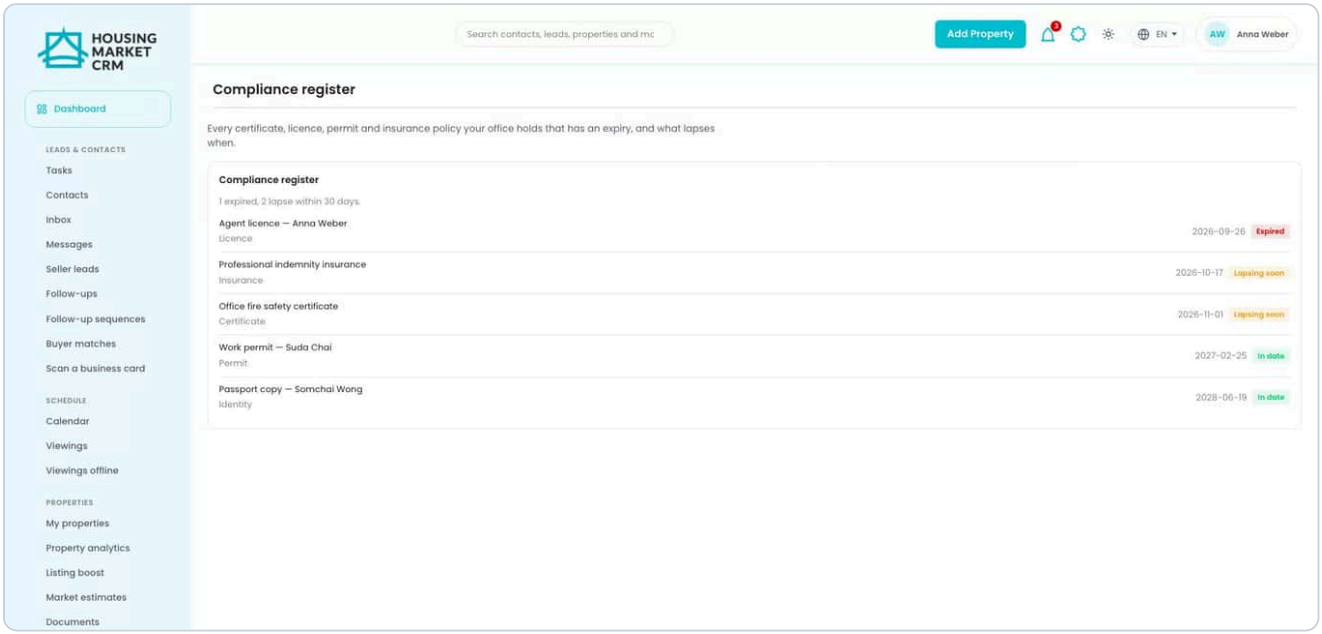


Figure 95.2 · Screen recorded 8 October 2026

3 One line: what is **expired**, and what lapses within 30 days.

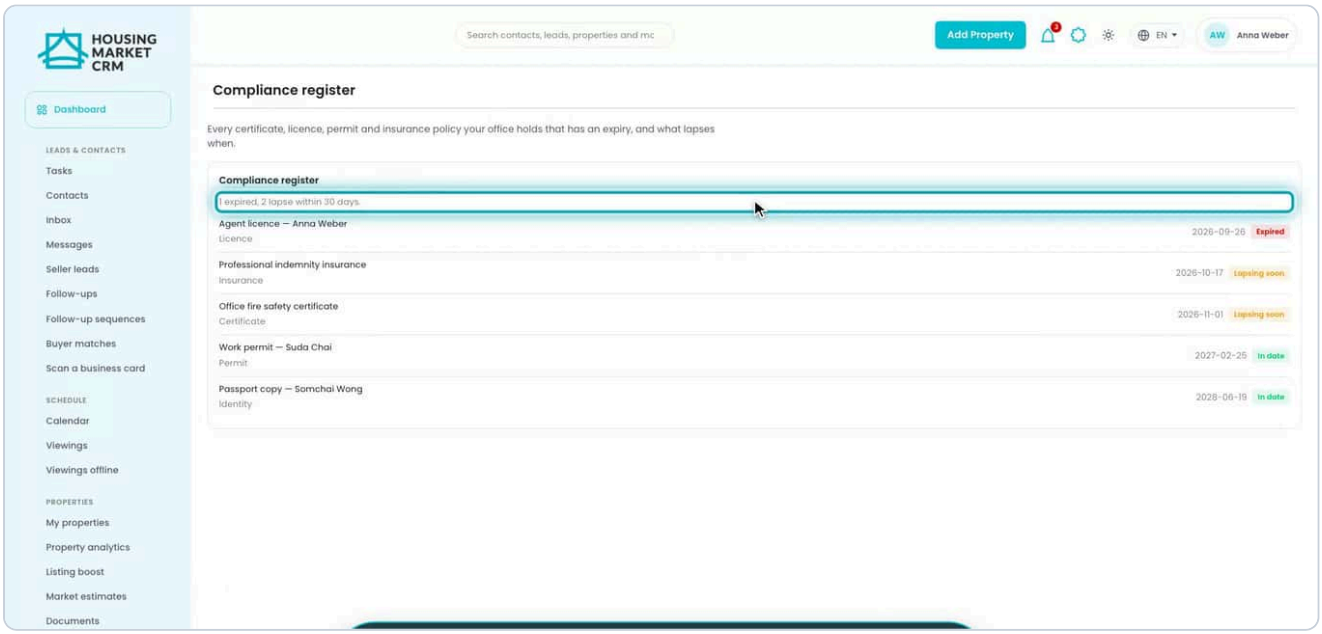


Figure 95.3 · Screen recorded 8 October 2026

4 **Expired** — act today.

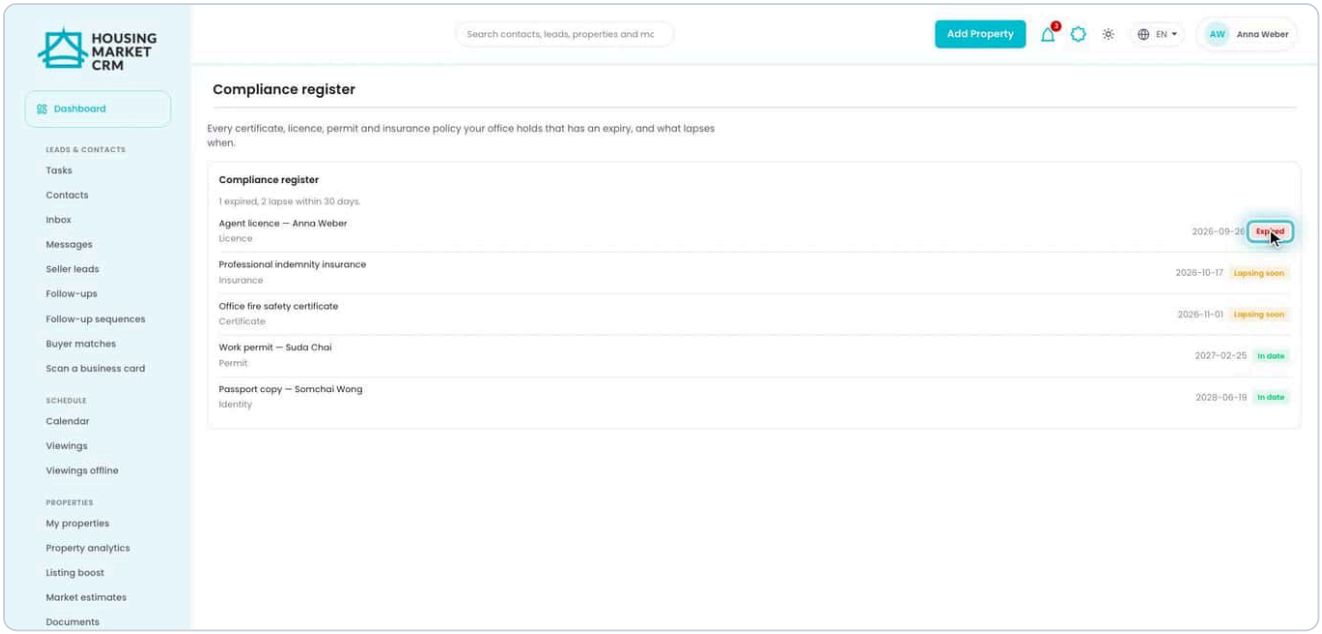


Figure 95.4 · Screen recorded 8 October 2026

5 **Lapsing soon** is the 30-day window.

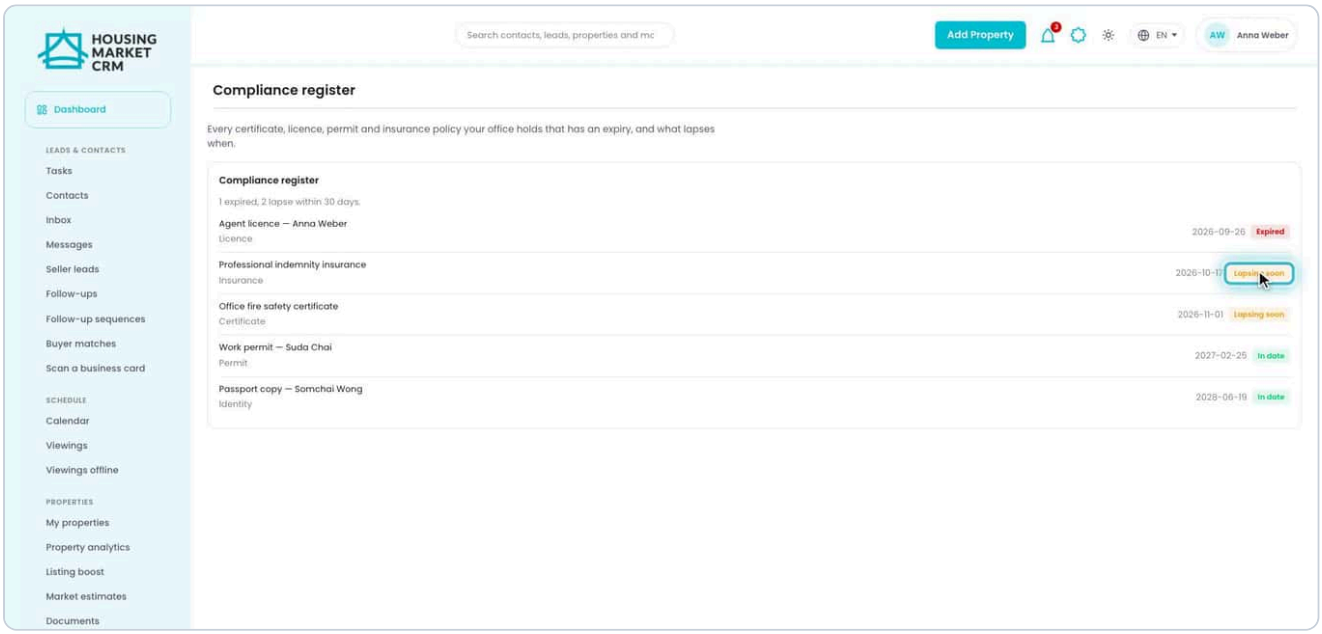


Figure 95.5 · Screen recorded 8 October 2026

6 **In date** needs nothing from you.

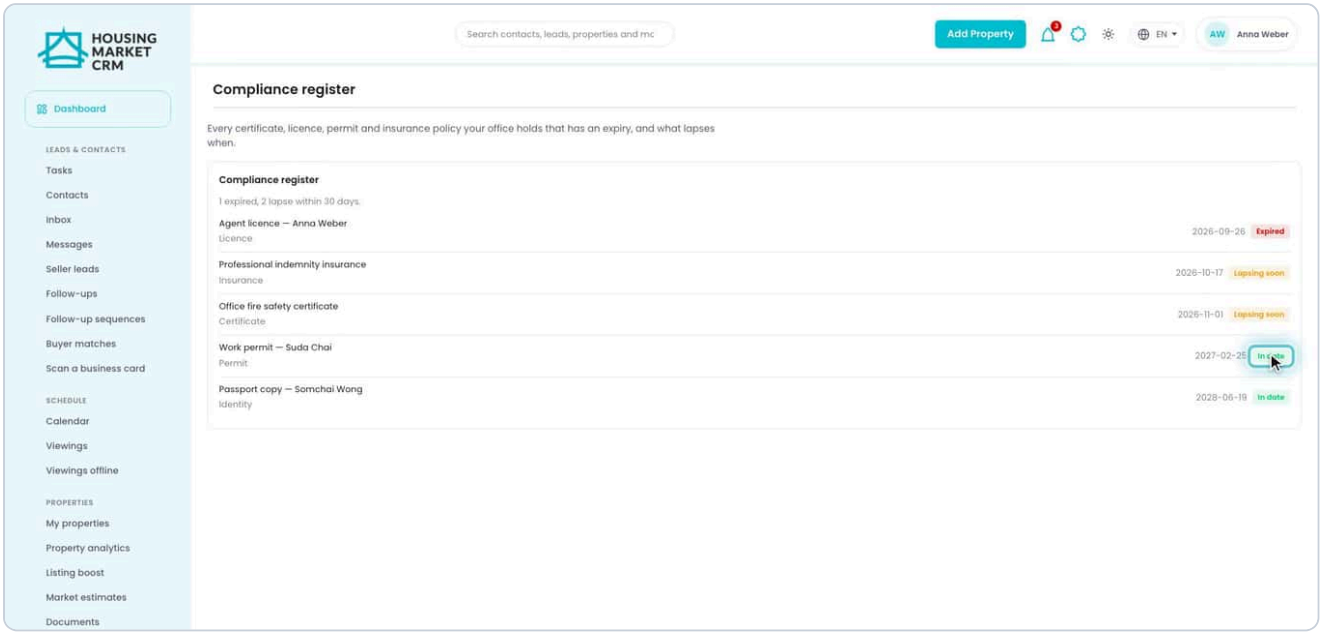


Figure 95.6 · Screen recorded 8 October 2026

7 Add the **whole office**, not only your own licence.

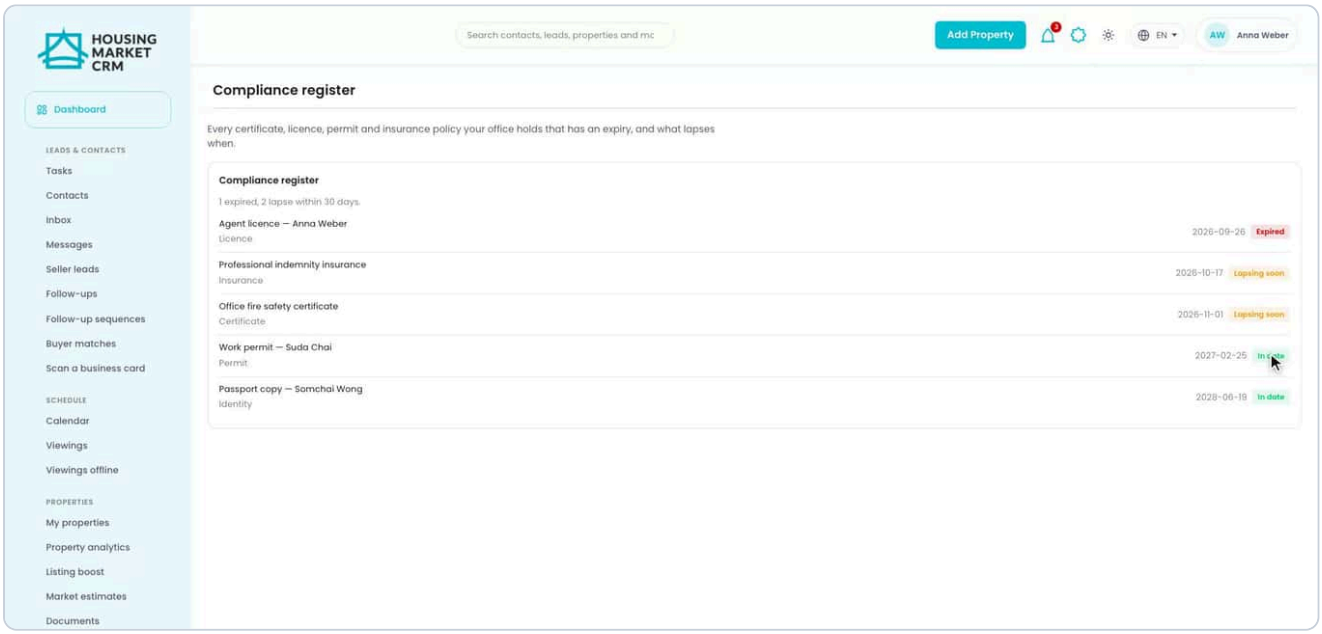


Figure 95.7 · Screen recorded 8 October 2026

8 Every one of these is also in **Documents**, filed against whoever holds it.

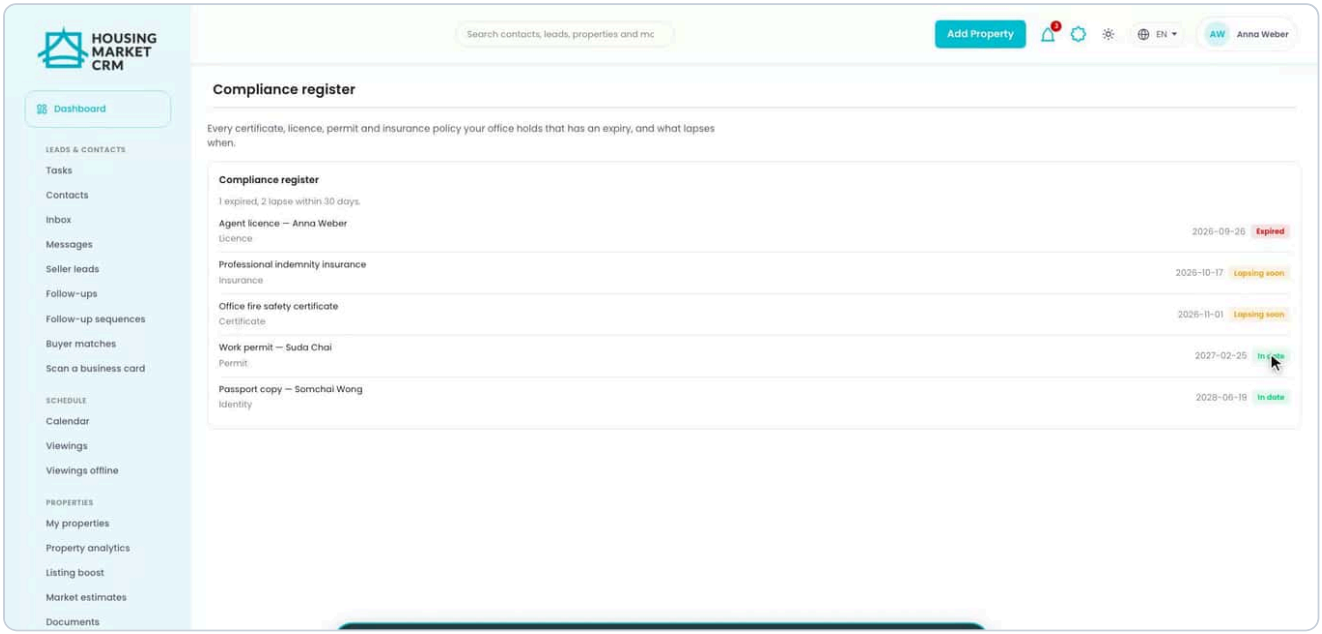


Figure 95.8 · Screen recorded 8 October 2026

9 This screen exists to answer one question: **what lapses next?**

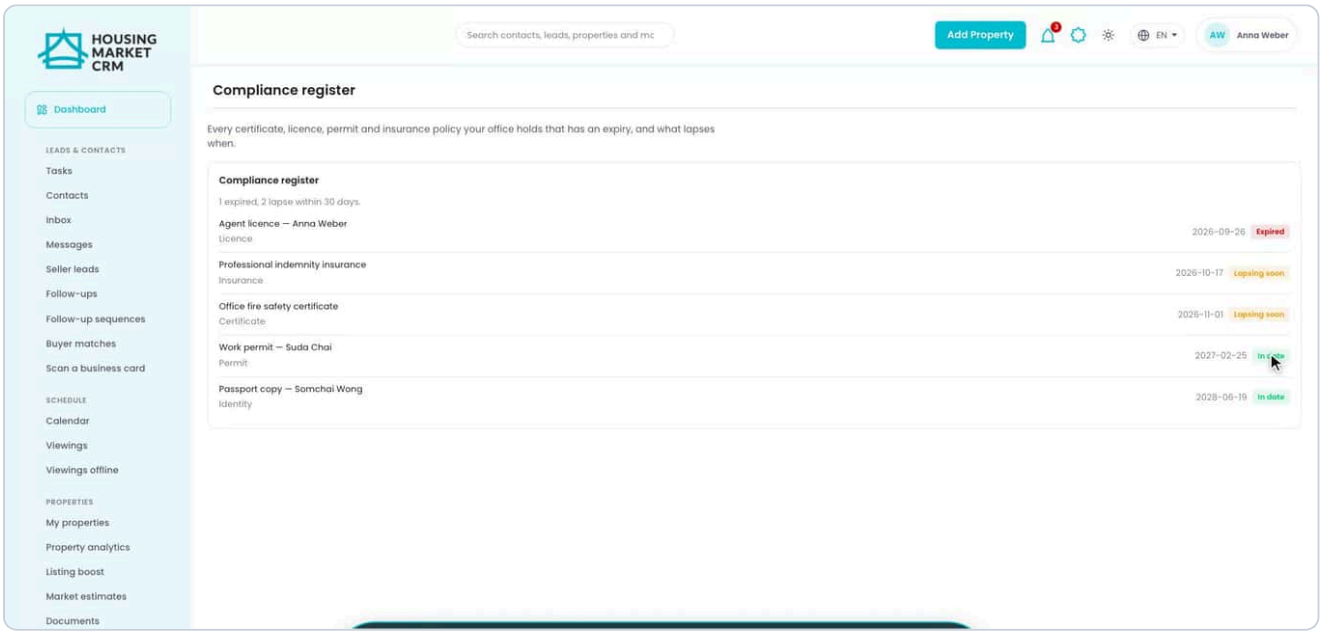


Figure 95.9 · Screen recorded 8 October 2026

RELATED HELP CENTER ARTICLES

How do documents, contracts and leases work?	faq.housingmarketgroup.com/faq/how-do-documents-contracts-and-leases-work

96 CHAPTER 96

Lease reminders

Pro and Business | For agents | Watch the video

OVERVIEW

Every plan has a document vault on contacts and listings with expiry reminders. Pro adds contracts from your templates — signed on screen, or sent to be signed remotely by somebody with no CRM account — and lease records that remind you before a lease ends.

Document vault

Keep documents against a contact, a listing or a lease, with an expiry date if they have one, and the CRM reminds you before it passes. Agents archive documents; deleting takes a manager with the right to, and a signed document cannot be deleted by anyone.

Contracts, on Pro

Generate a contract from one of your own templates and have it signed on screen. Each signature is tied to the exact text shown to the signer, and once the first signature is on it, the text can no longer be edited, so everyone signs the same document.

A contract can also be sent to be signed remotely. Each party is emailed a private link that needs no account and no password, and signs in their own browser; the signature is bound to the same text in the same way. See "How do I send a document to be signed remotely?".

Leases, on Pro

Record what a landlord and tenant agreed and mark its status yourself. When an active lease is getting close to its end, the CRM raises a lead for the tenant, who is about to look for a new home, and a follow-up to ask the landlord whether to relist. Rent and deposit are recorded for reference only; the CRM never collects or converts money.

From the Help Center: **How do documents, contracts and leases work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

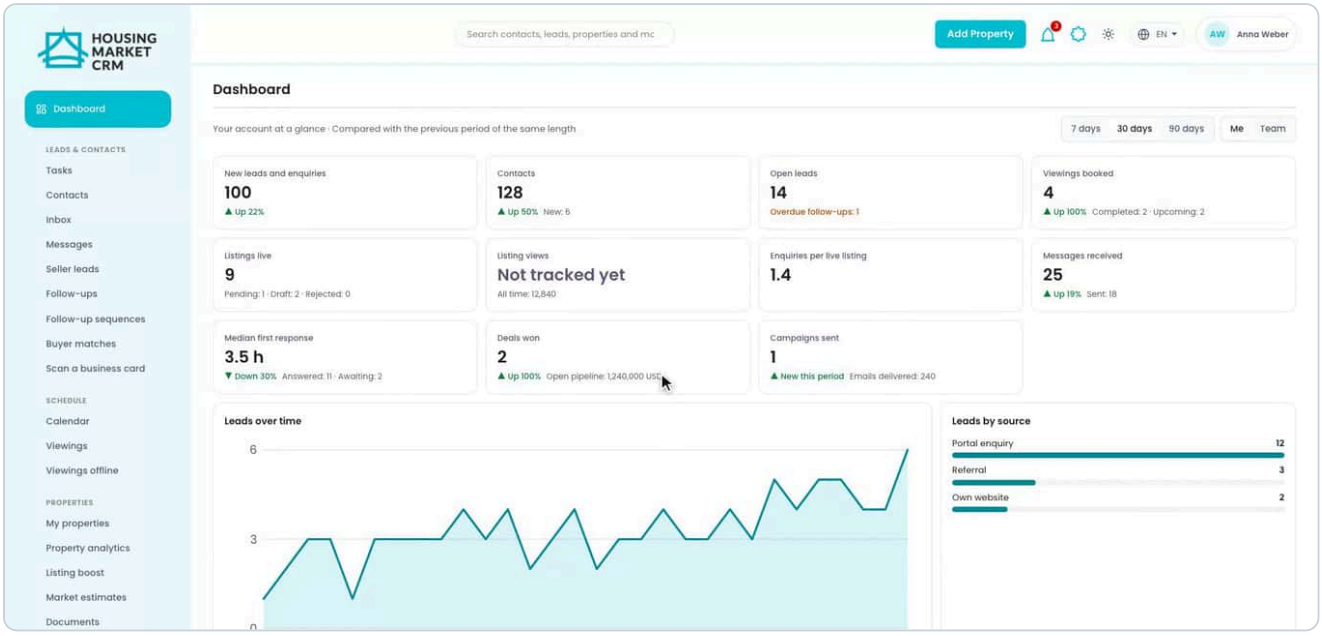


Figure 96.1 · Screen recorded 8 October 2026

2 Click **Leases** in the left menu.

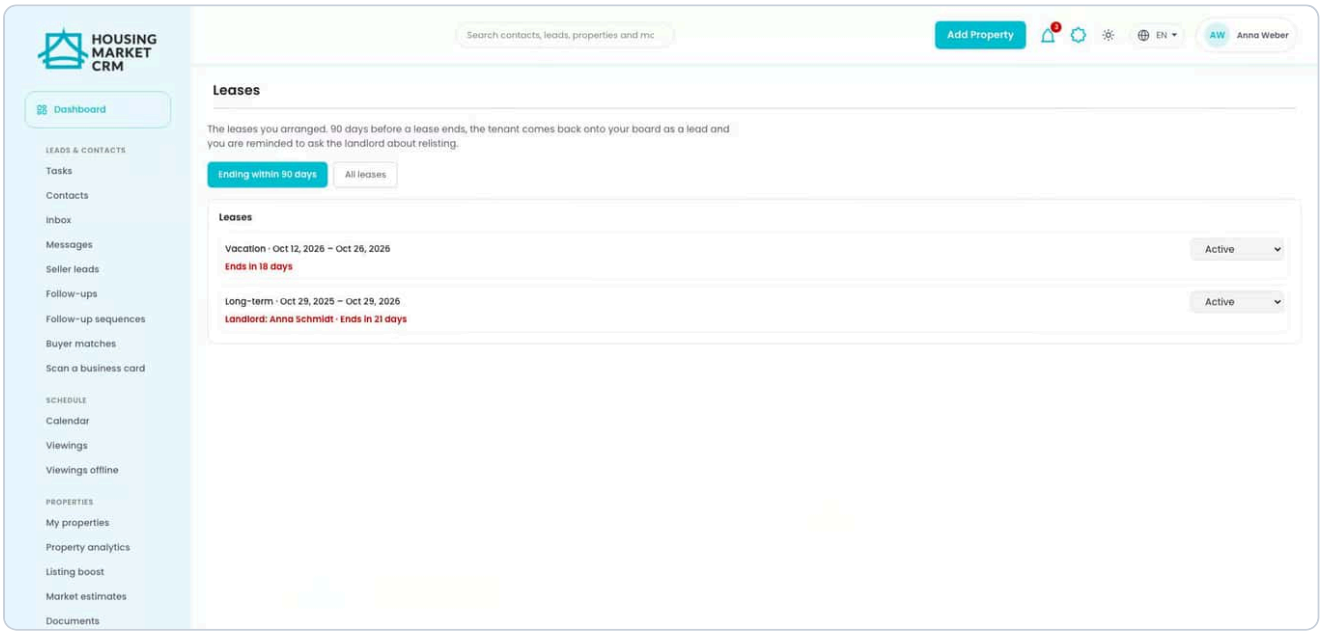


Figure 96.2 · Screen recorded 8 October 2026

3 The tenancies **you** brokered — not the ones your agency manages.

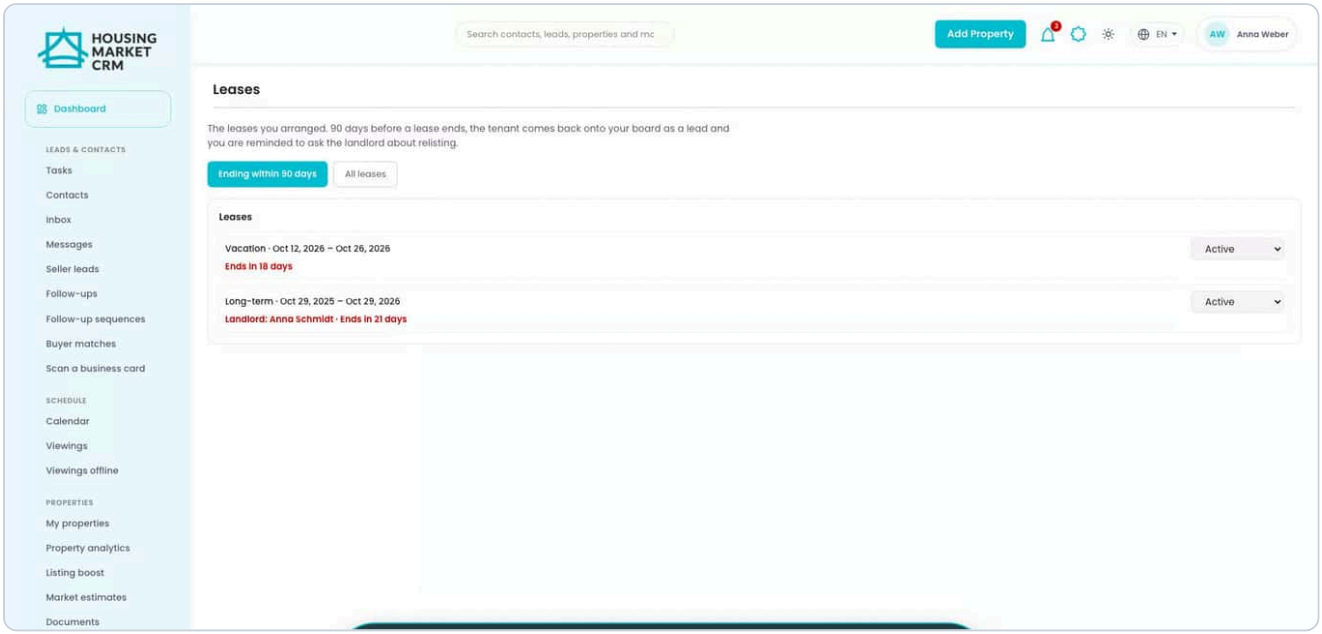


Figure 96.3 · Screen recorded 8 October 2026

4 **Ending within 90 days** — the list to work each month.

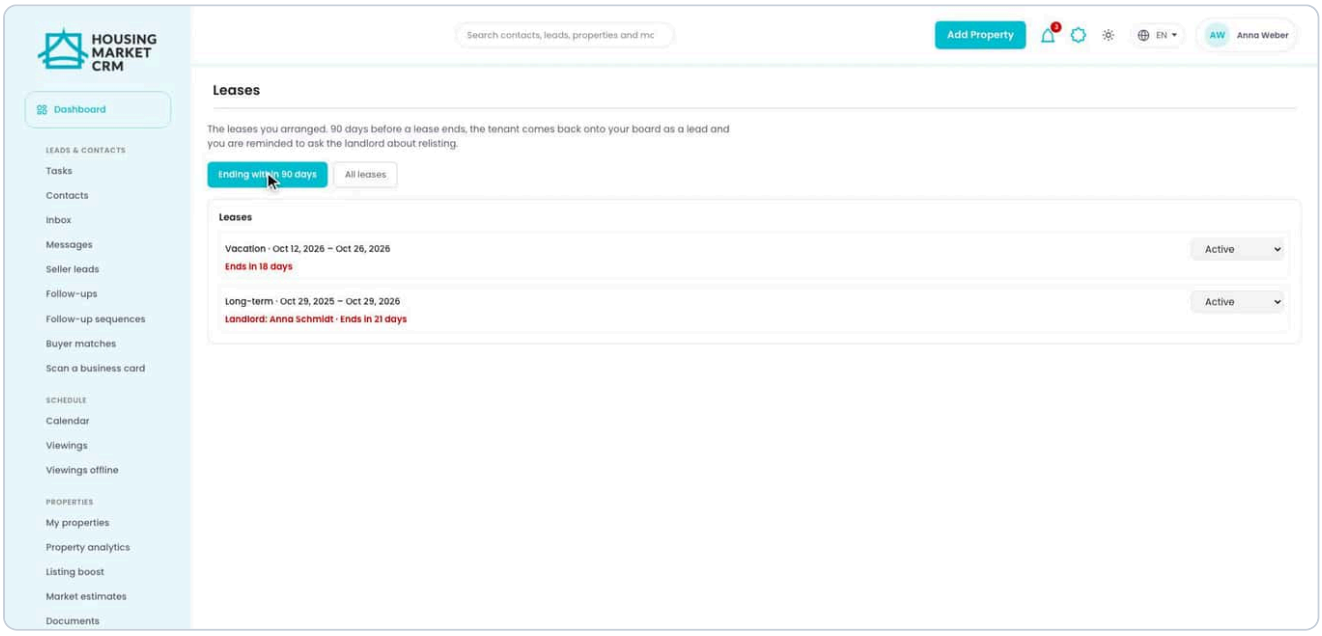


Figure 96.4 · Screen recorded 8 October 2026

5 At 90 days the tenant returns to your board as a **lead**.

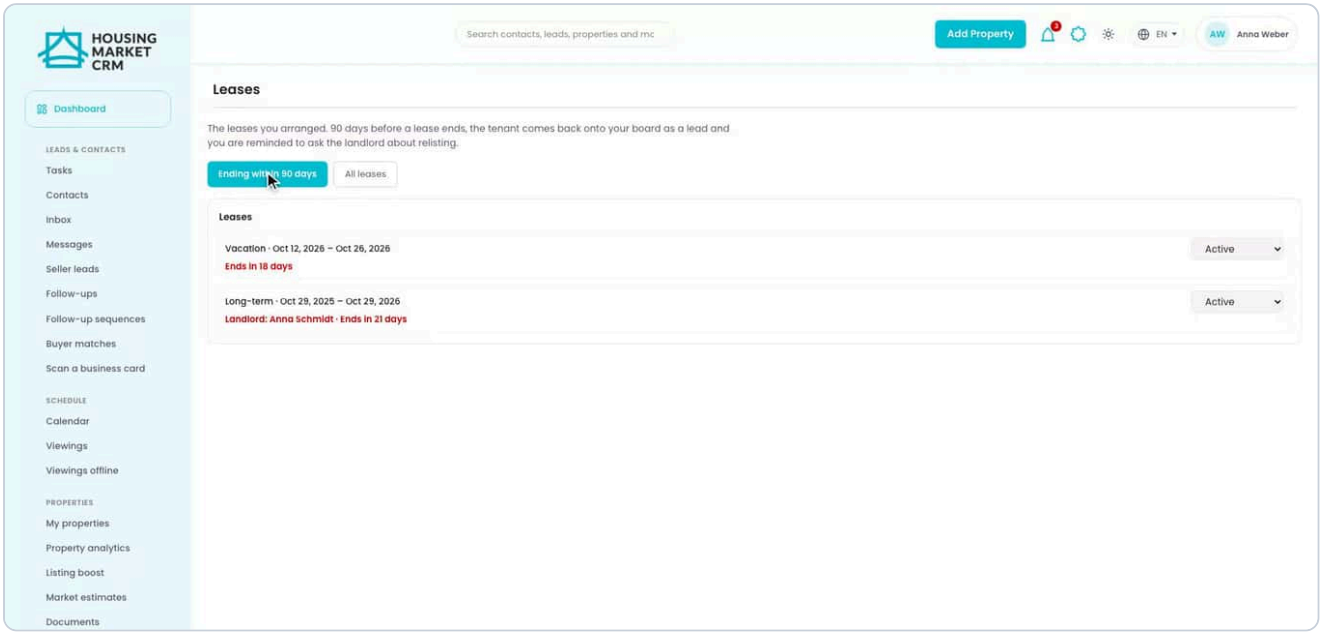


Figure 96.5 · Screen recorded 8 October 2026

6 And you are reminded to ask the landlord about **relisting**.

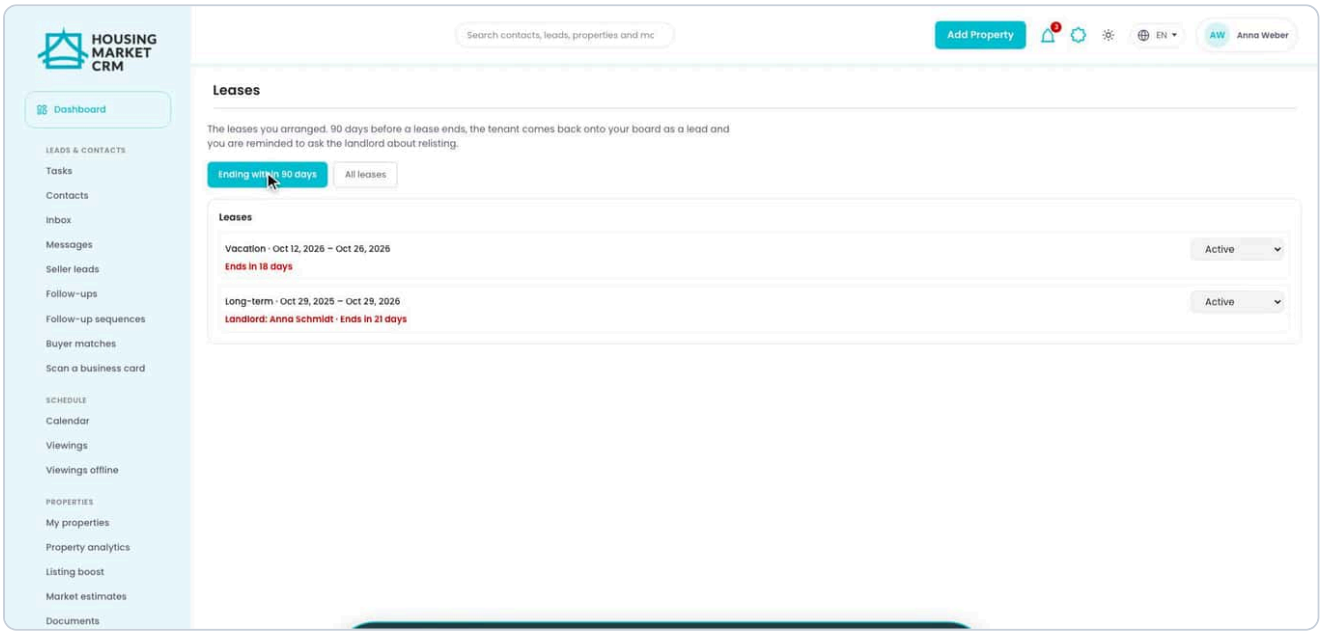


Figure 96.6 · Screen recorded 8 October 2026

7 Back to **All leases**.

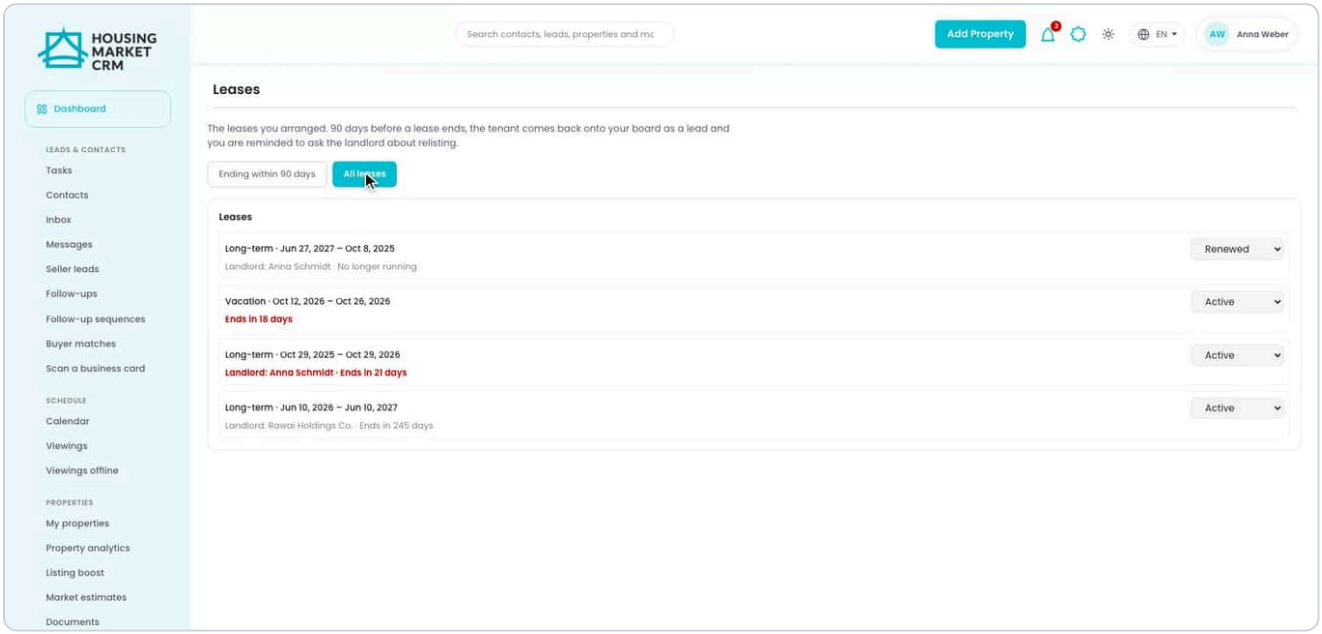


Figure 96.7 · Screen recorded 8 October 2026

8 Ask the **tenant** about renewing and the **landlord** about relisting together —.

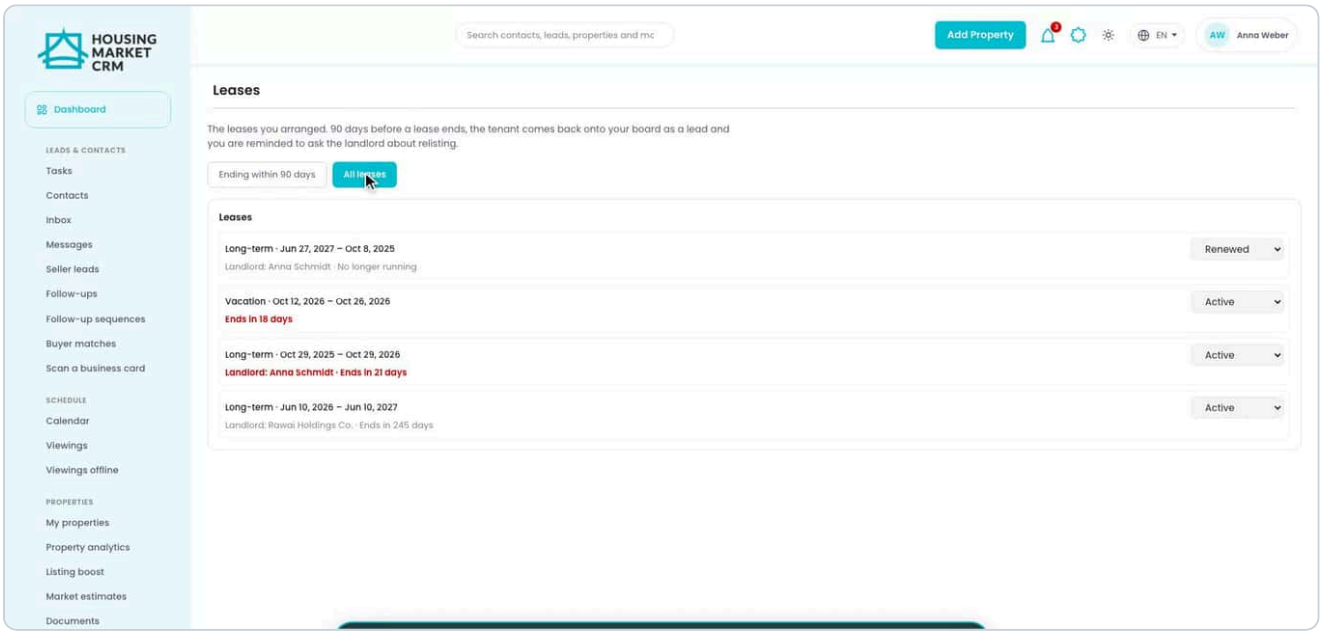


Figure 96.8 · Screen recorded 8 October 2026

9 because one answer decides the other.

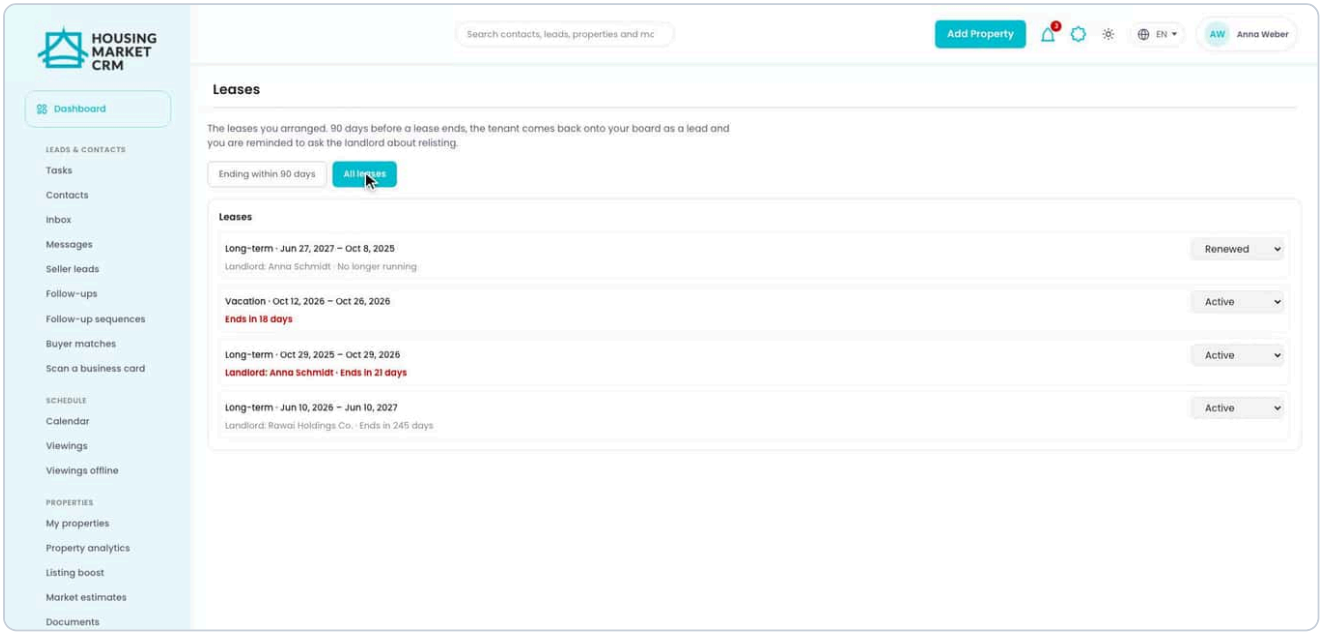


Figure 96.9 · Screen recorded 8 October 2026

10 Record the rent, so next time you know what the home really let for.

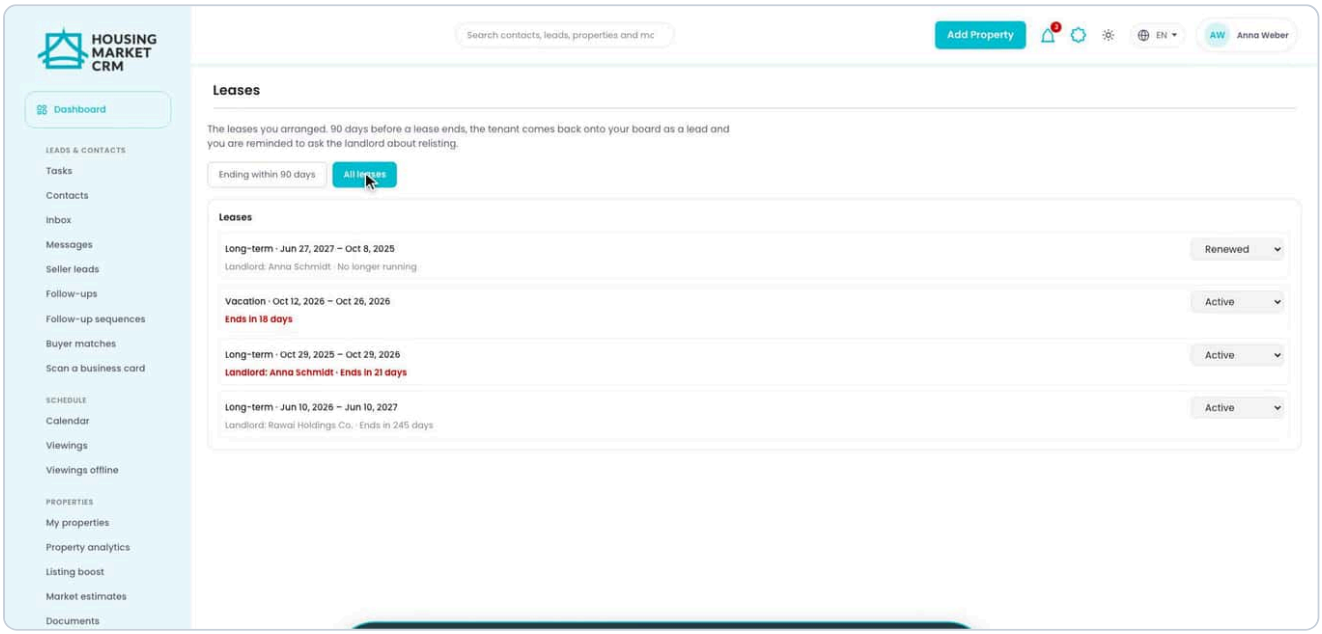


Figure 96.10 · Screen recorded 8 October 2026

GOOD TO KNOW

NOTE

A register of the homes your agency looks after for other people: each unit, who owns it, and for how long. It is part of Pro and Business, and it is separate from the properties you are selling or letting.

Help Center: What is Property management in the CRM?

97 CHAPTER 97

The client portal

Business | For agents, office managers | Watch the video

OVERVIEW

On Business, you can invite a buyer or seller from their contact record to a private page where they sign in with an email link and see what you have shared with them.

From a contact's record, invite them to the client portal. They receive an email with a sign-in link — there is no password to create — and see only what you have chosen to share with them. It is part of Business.

- A buyer sees the shortlist of properties you have put together for them, and the viewings they have booked.
- A seller sees their listings and the feedback notes you share with them.

A sign-in link and a session both expire, so a phone left unlocked on a table is not a standing login; getting back in is a new link by email. You can revoke a client's access at any time, on any plan.

If an account drops below Business, clients' access is paused with a friendly message rather than deleted, and upgrading again restores it exactly as it was.

From the Help Center: **What is the client portal?**

STEP BY STEP

1 This is what your **client** sees — their own page.

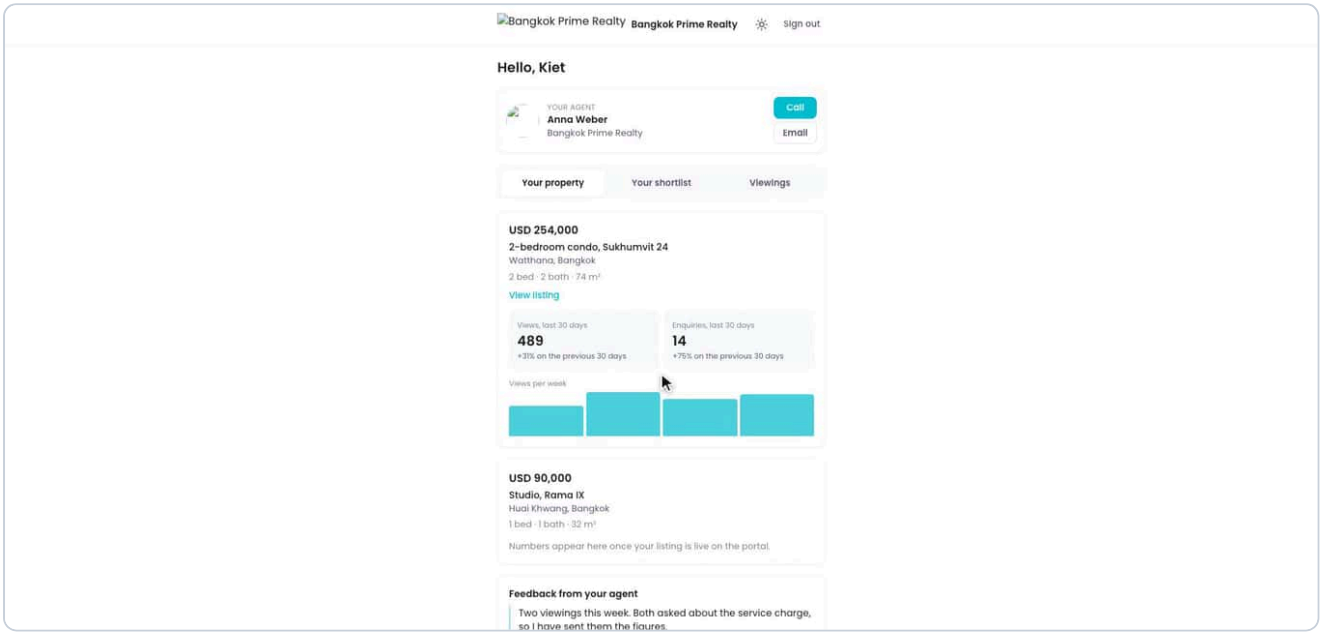


Figure 97.1 · Screen recorded 8 October 2026

2 A seller sees **views per week** on their own listing.

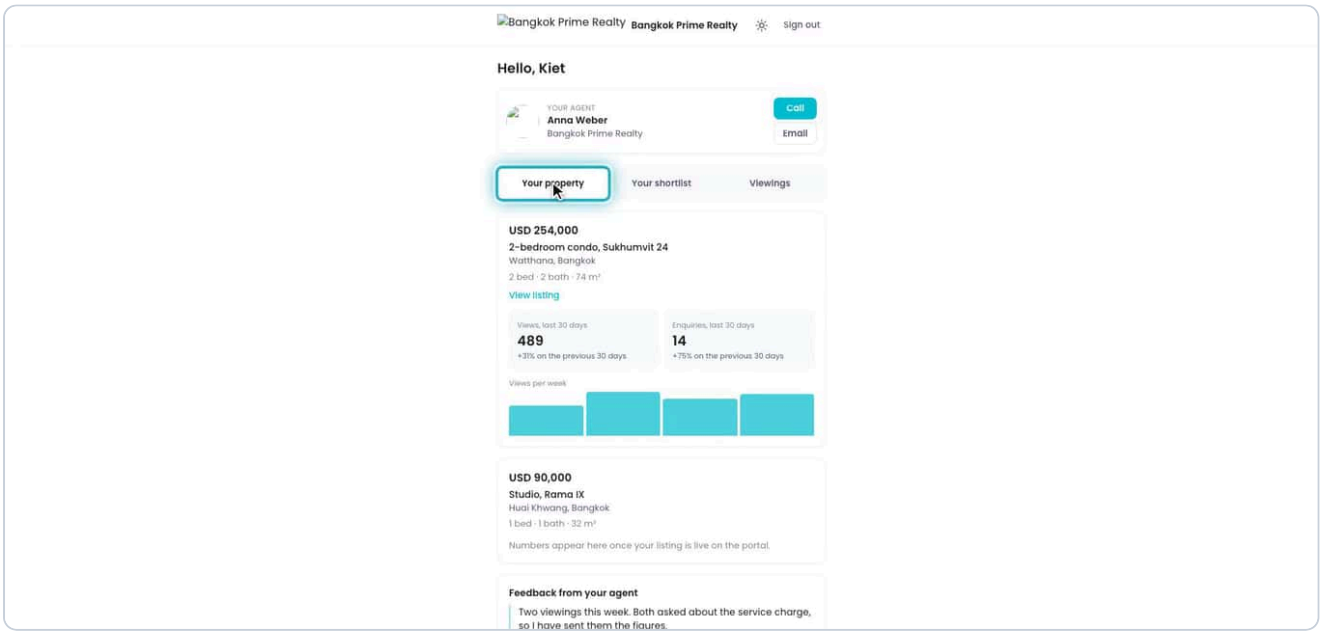


Figure 97.2 · Screen recorded 8 October 2026

3 And the notes you wrote them — so write them for the seller.

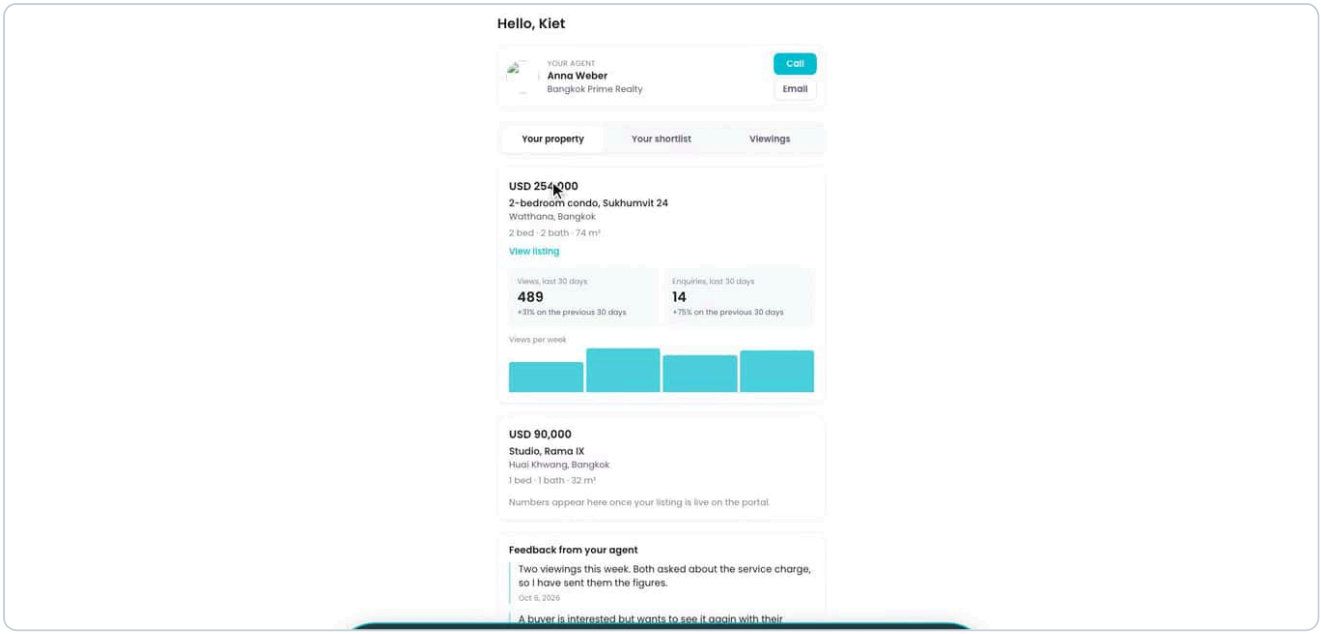


Figure 97.3 · Screen recorded 8 October 2026

4 A buyer sees the **shortlist** you built.

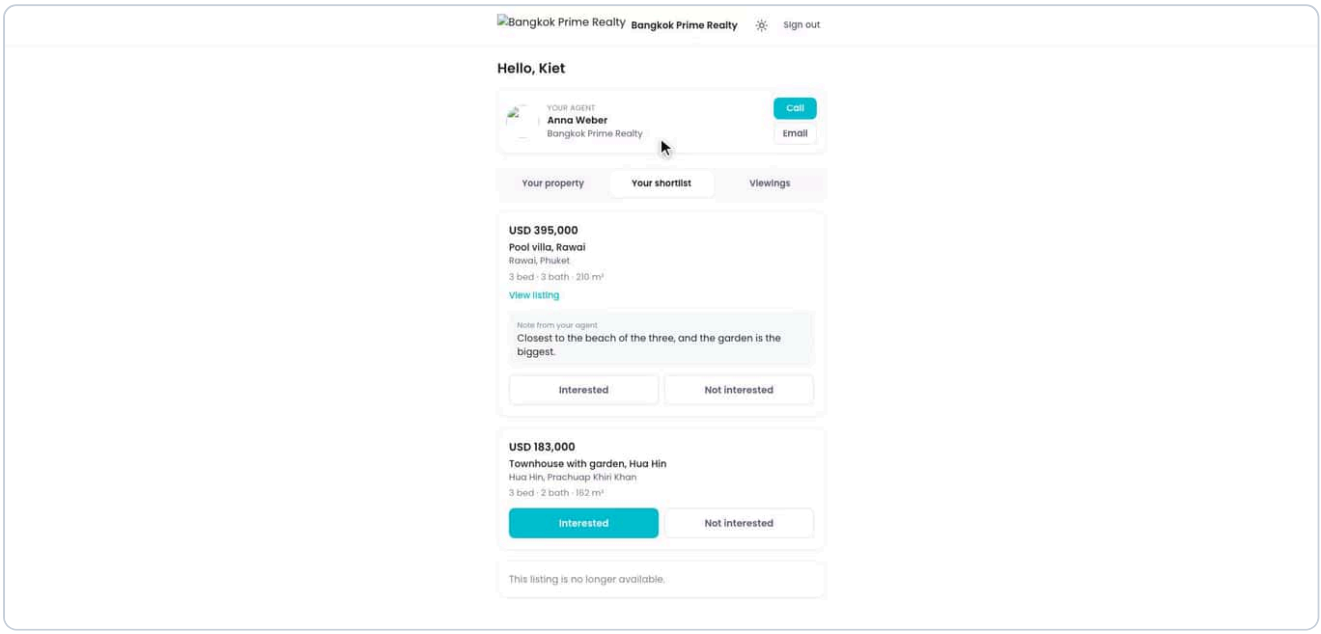


Figure 97.4 · Screen recorded 8 October 2026

5 They tell you which they like — and it comes back to the **CRM**.

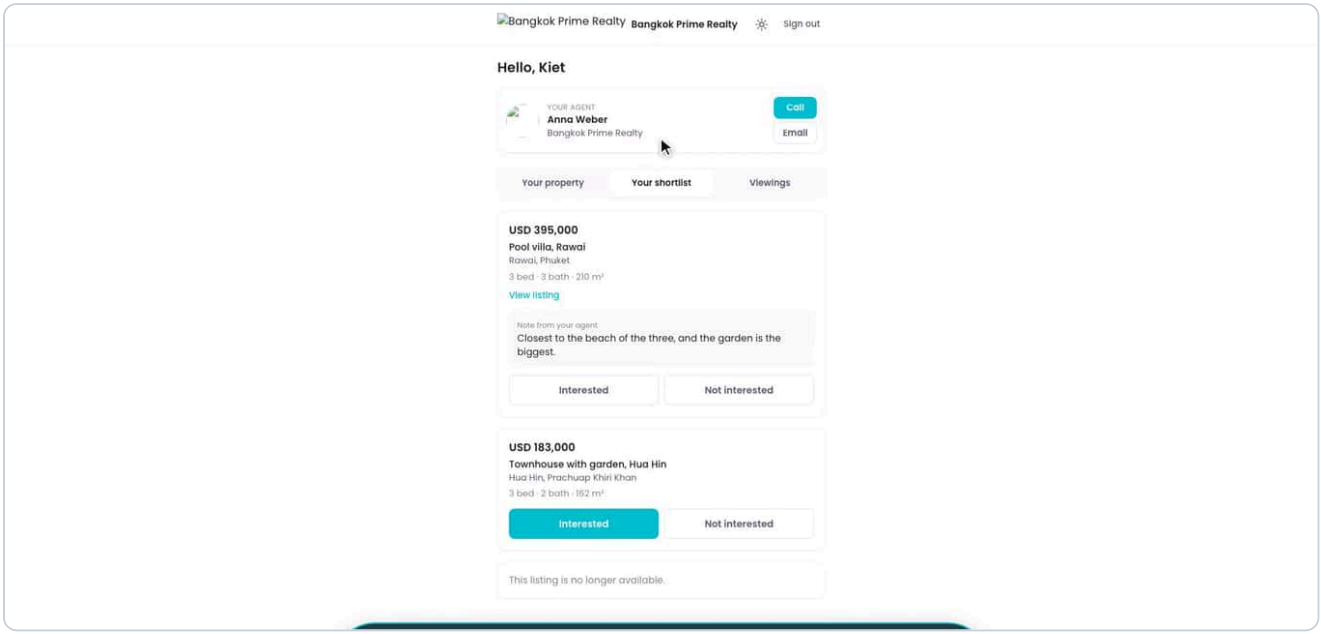


Figure 97.5 · Screen recorded 8 October 2026

6 And the **viewings** booked for them.

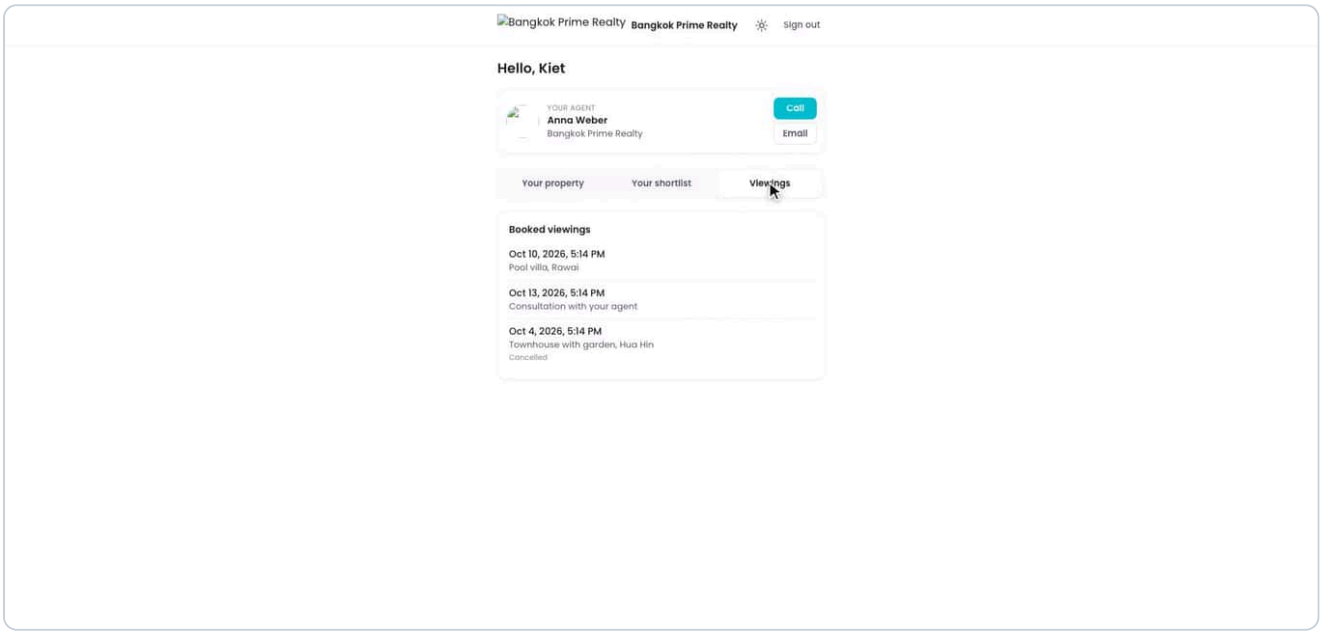


Figure 97.6 · Screen recorded 8 October 2026

7 They sign in with a **link you email**. There is no password to lose.

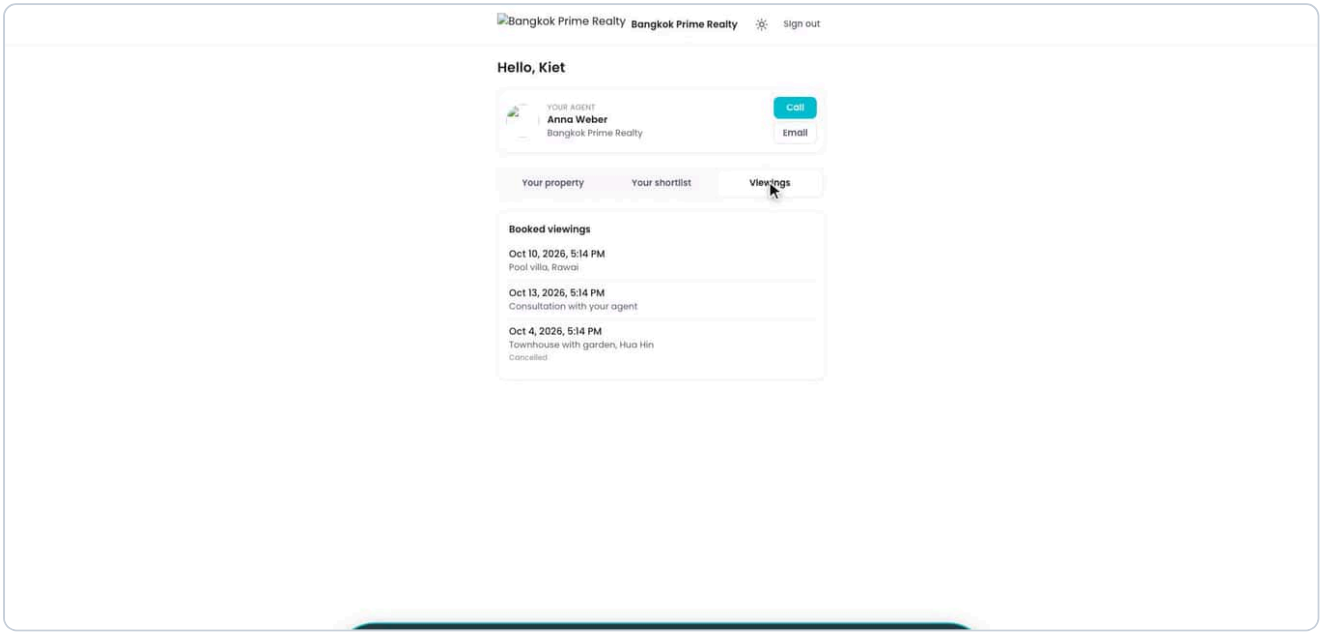


Figure 97.7 · Screen recorded 8 October 2026

8 A seller who can read their own figures **asks for them less often**.

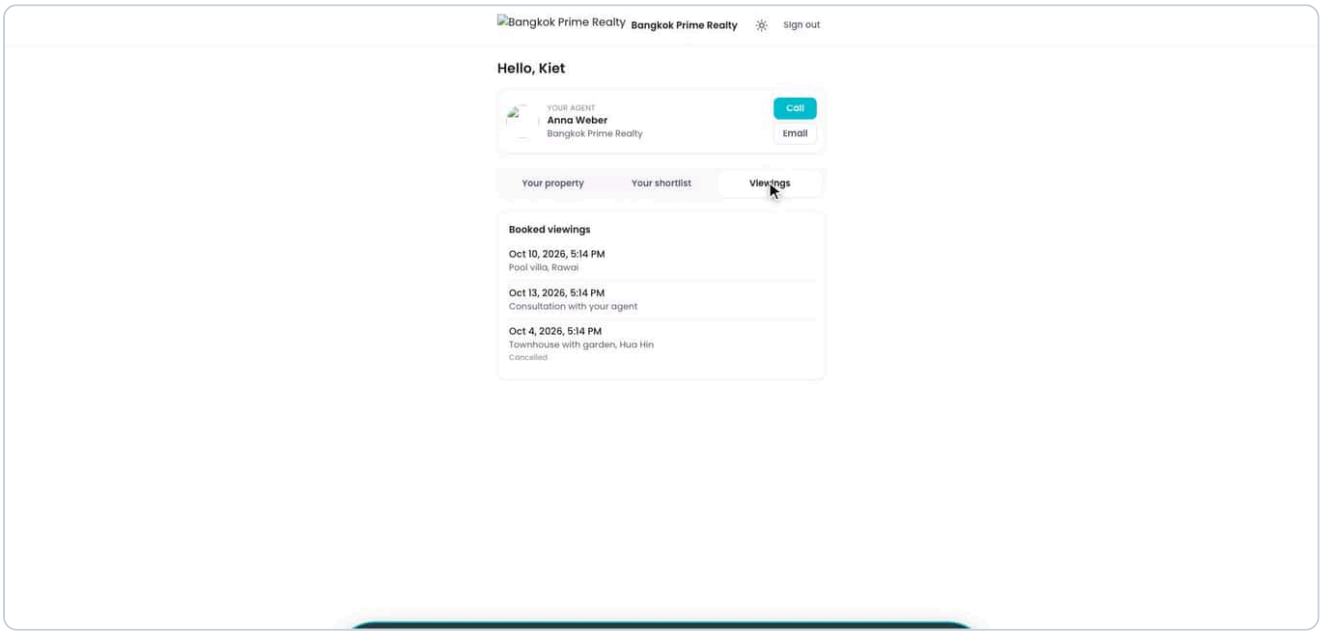


Figure 97.8 · Screen recorded 8 October 2026

9 So write the feedback notes as though the seller will read them. They will.

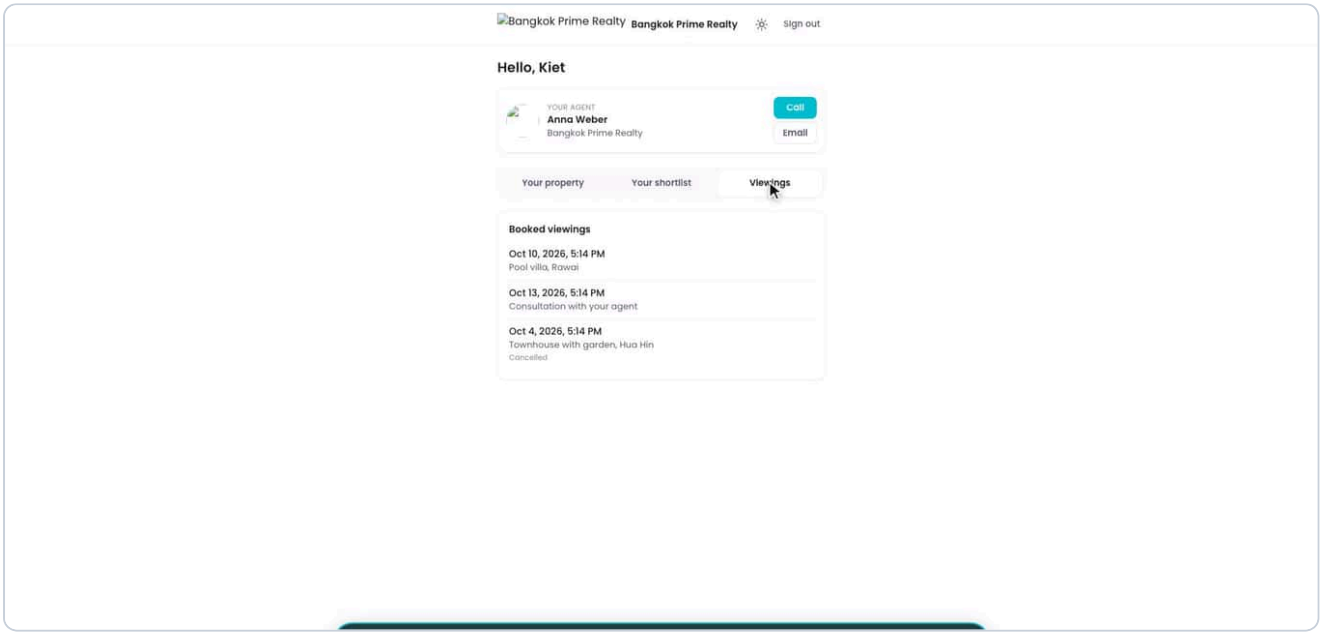


Figure 97.9 · Screen recorded 8 October 2026

98 CHAPTER 98

Your profile and reviews

All plans | For agents | Watch the video

OVERVIEW

Reviews, the licence, agency and phone badges and profile analytics are free on every plan. The Verified agent badge is a separate paid application, renewed and re-checked every year.

Reviews, the three verification badges and profile analytics are part of the free plan, on purpose: a directory where only paying agents could be rated would rank agents by what they pay rather than by how their clients rate them. The Verified agent badge is a different thing and it is paid; it is the last section of this answer.

Reviews

When you move a lead to Deal closed, the CRM schedules a review request to that client after a delay you can set. You can pause a request for a particular client, but not stop reviews altogether. A review can only be written through such a request, so every rating comes from someone you actually closed a deal with. You can reply to a review, and Housing Market Group moderates them.

The three free badges

In Profile & reviews, upload evidence for any of three badges — your licence, your agency, and your phone number. Our team checks the document and approves or rejects it. A badge you already hold stays while a renewal is being checked. These three cost nothing, on any plan, and they do not depend on the Verified agent application below.

Profile analytics

The same screen shows how often your profile is viewed, the enquiries it produces, and what is holding it back.

The Verified agent badge

Verified agent is a fuller check of who you are, and it is paid for on its own, on top of whatever plan you hold — it is not part of Pro and it is not part of Business, and an agent on the free plan can apply for it just as well. Applying through the CRM costs 19 USD per year. The fee pays for the review and not for its outcome, so an application that is not approved is not refunded.

Verification lasts a year. The fee is charged again each year, and that payment is what opens the yearly re-check, which goes to the review team with the documents they already hold — there is nothing to upload again. If it is not renewed, the badge lapses on its date. See "How do I become a verified agent?" for how to apply.

None of that touches the three free badges above. They are checked by the same team but they do not wait on the fee, so you can prove your licence, your agency and your telephone number today.

Your rating, reviews and badges appear on your agent page on the portal, and clients write their review on the portal page their review request links to.

From the Help Center: **How do reviews and verification badges work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

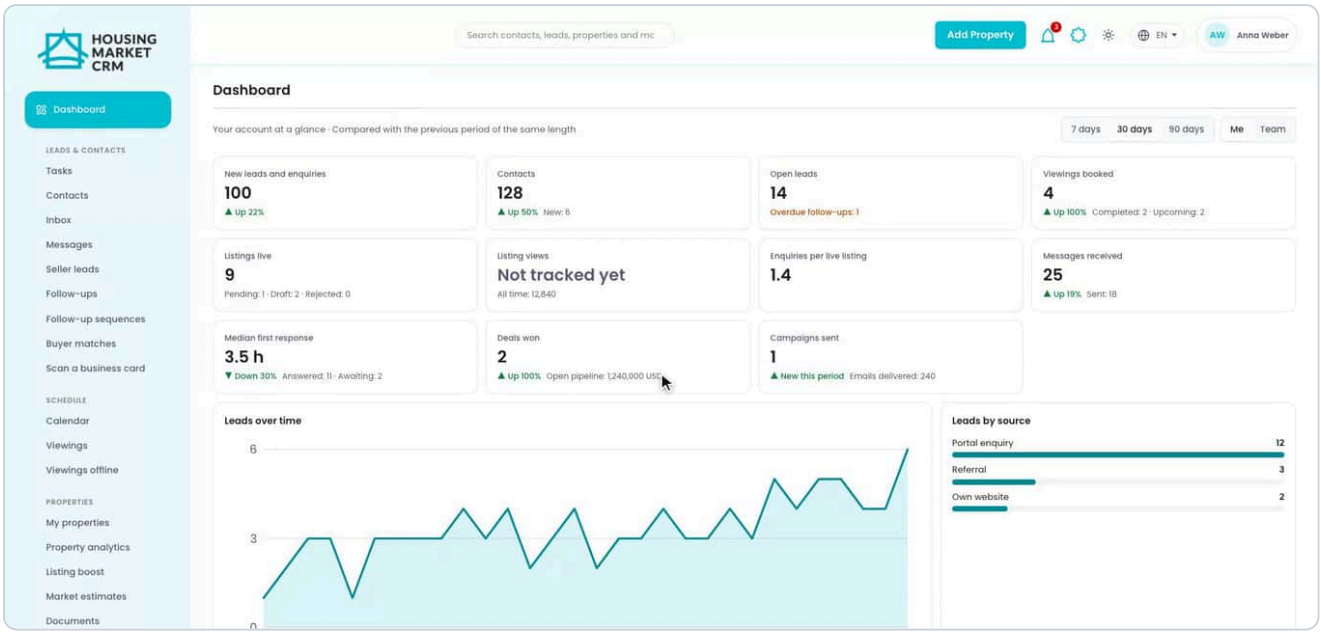


Figure 98.1 · Screen recorded 8 October 2026

2 Click **Profile & reviews** in the left menu.

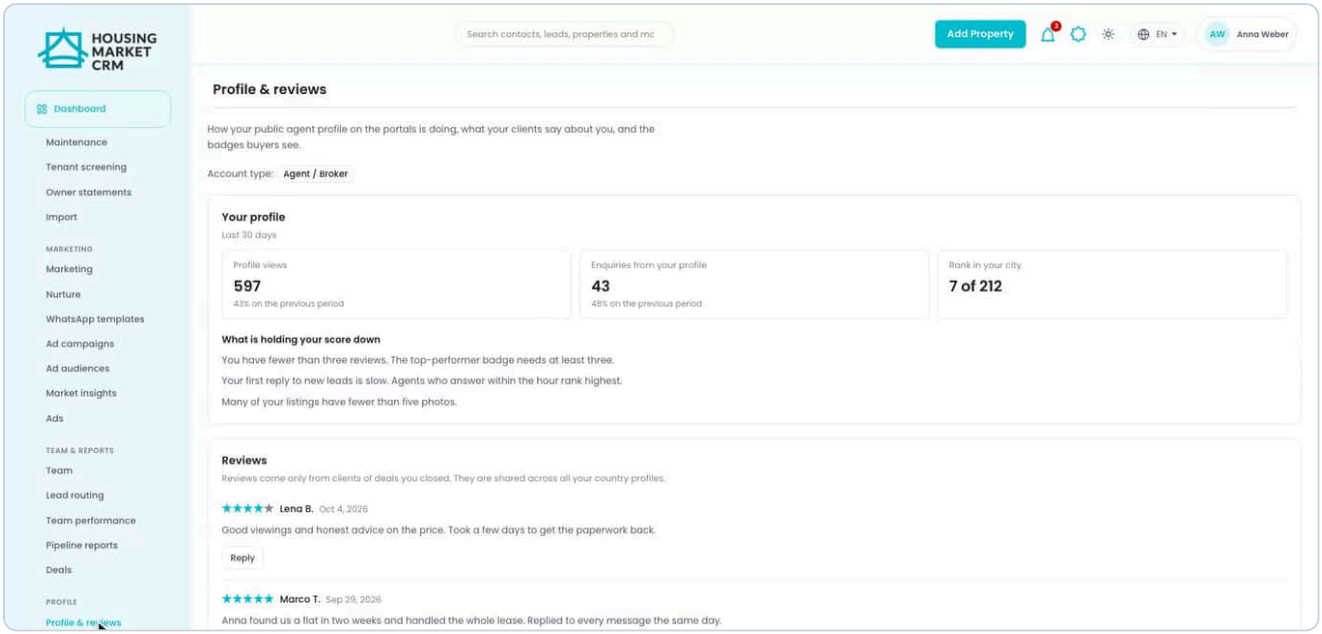


Figure 98.2 · Screen recorded 8 October 2026

3 Views, enquiries, and your **rank** among agents in the city.

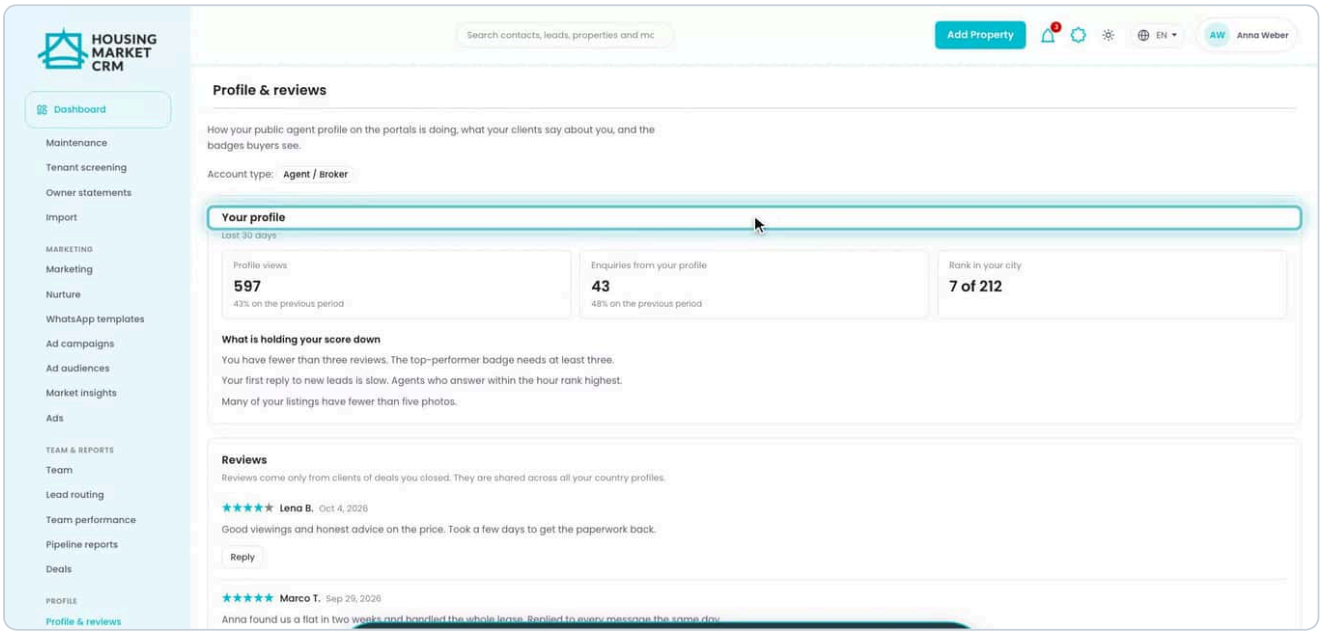


Figure 98.3 · Screen recorded 8 October 2026

4 The **hints** are the ranking in plain words.

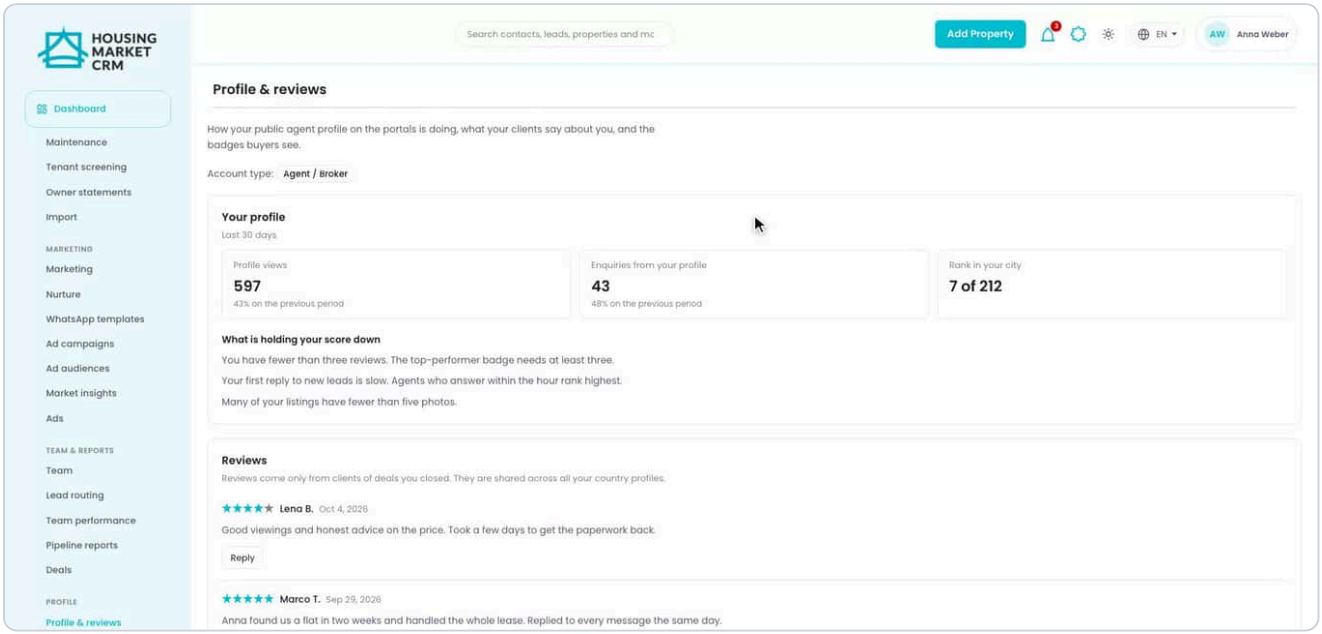


Figure 98.4 · Screen recorded 8 October 2026

5 What your clients wrote.

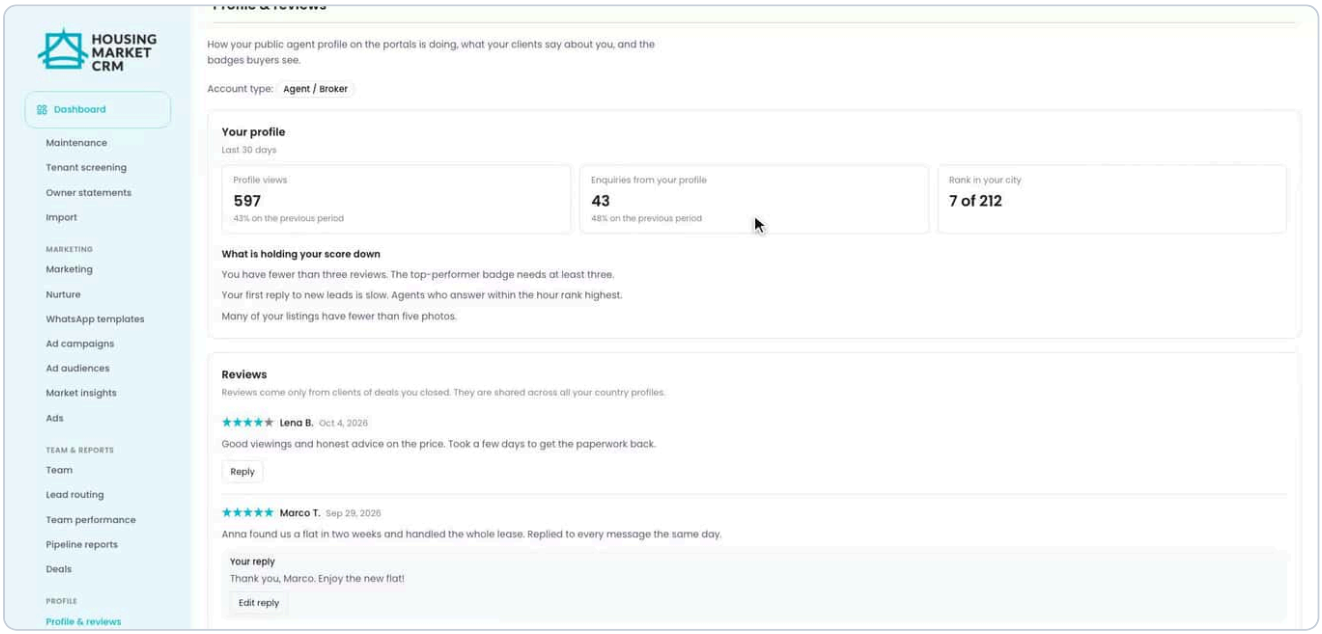


Figure 98.5 · Screen recorded 8 October 2026

6 Reply to every one — the next buyer reads it.

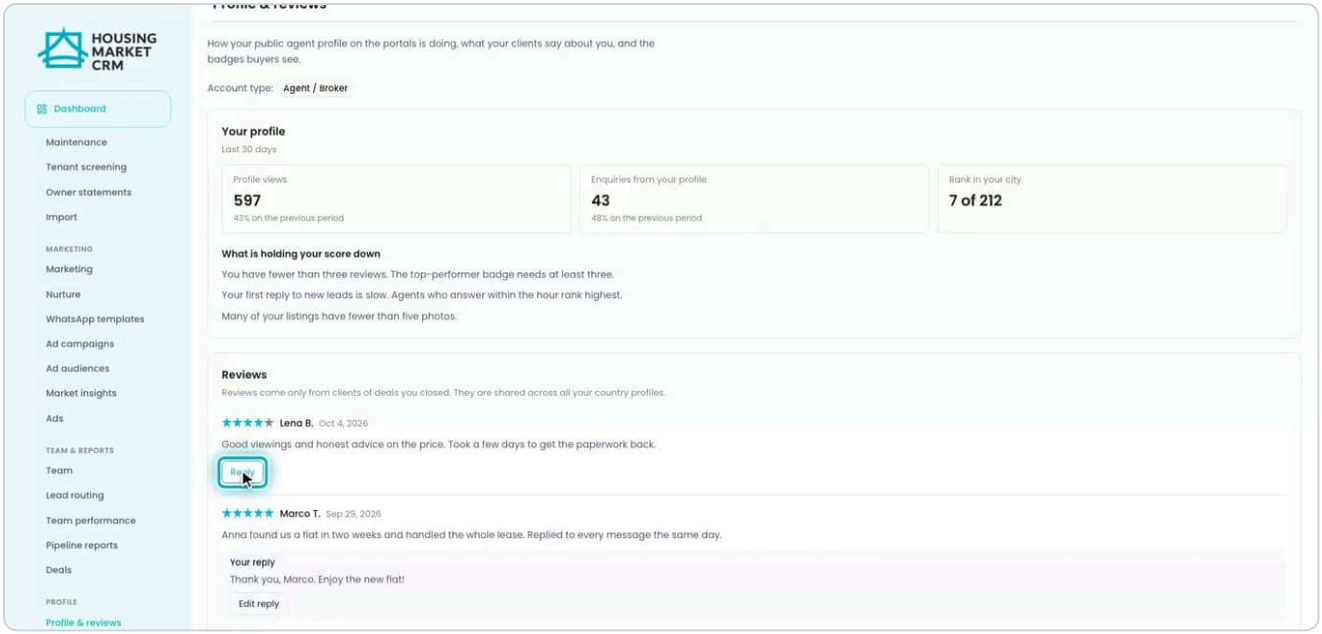


Figure 98.6 · Screen recorded 8 October 2026

7 What is waiting to go out after a deal.

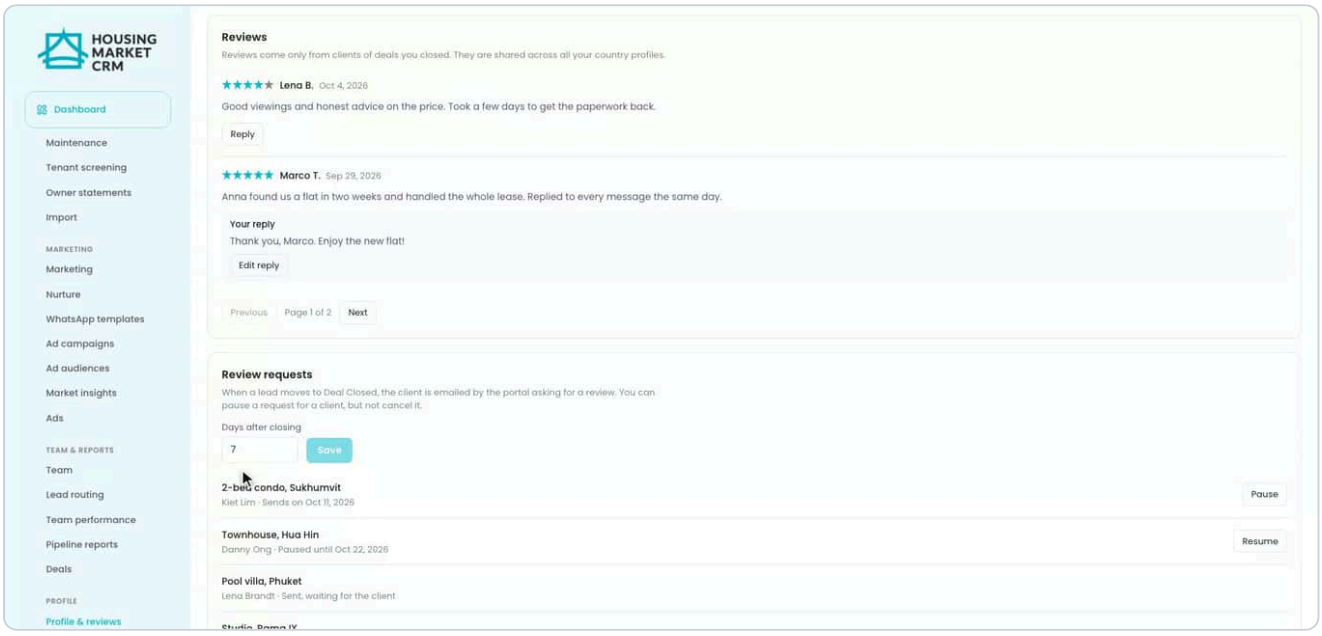


Figure 98.7 · Screen recorded 8 October 2026

8 **Pause** it twice at most — then it sends.

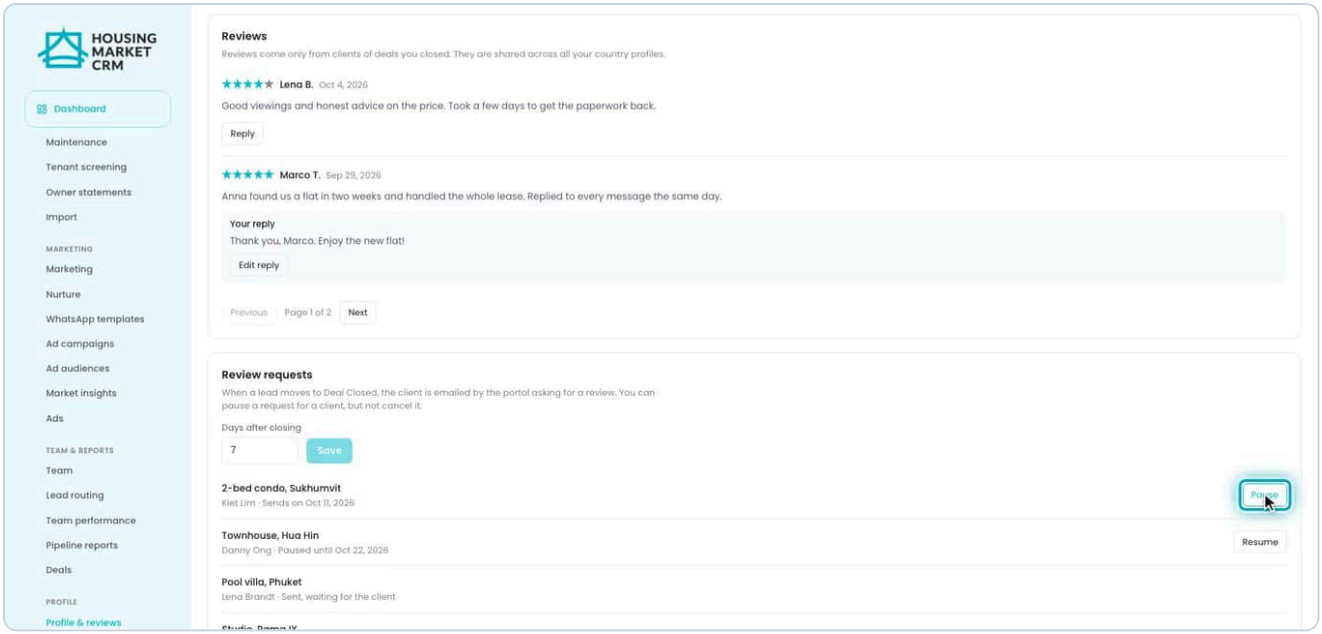


Figure 98.8 · Screen recorded 8 October 2026

9 The badges buyers see beside your name.

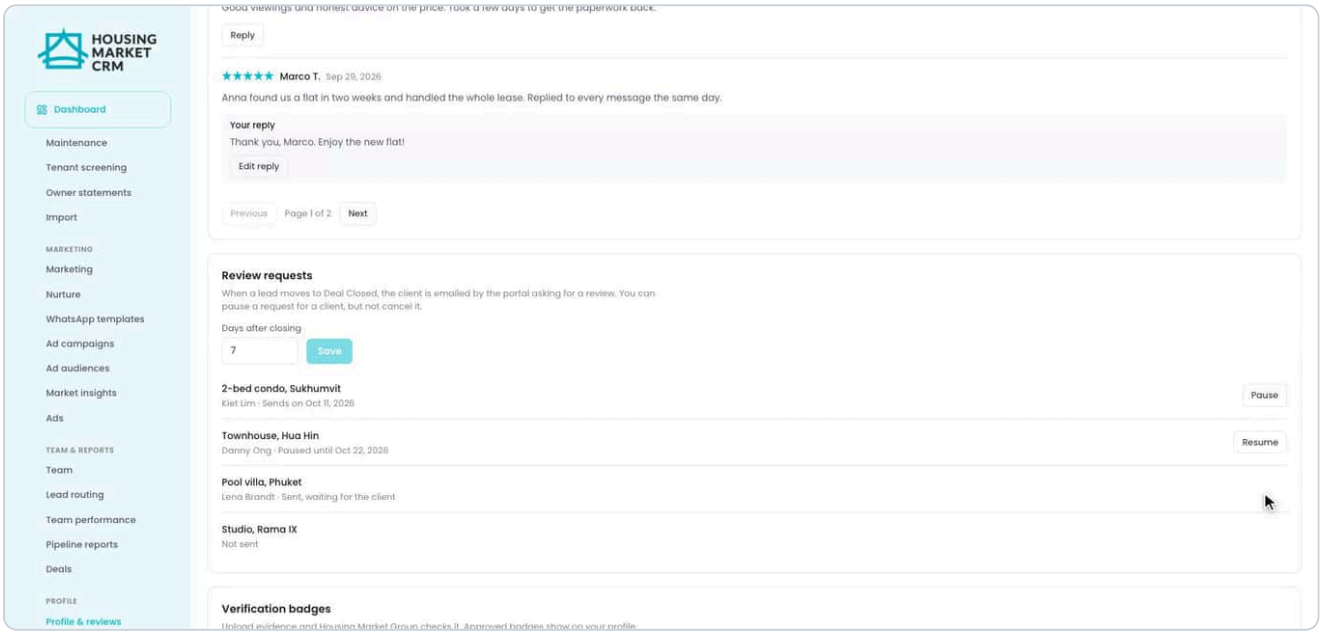


Figure 98.9 · Screen recorded 8 October 2026

10 Upload the evidence; a **person** reviews it.

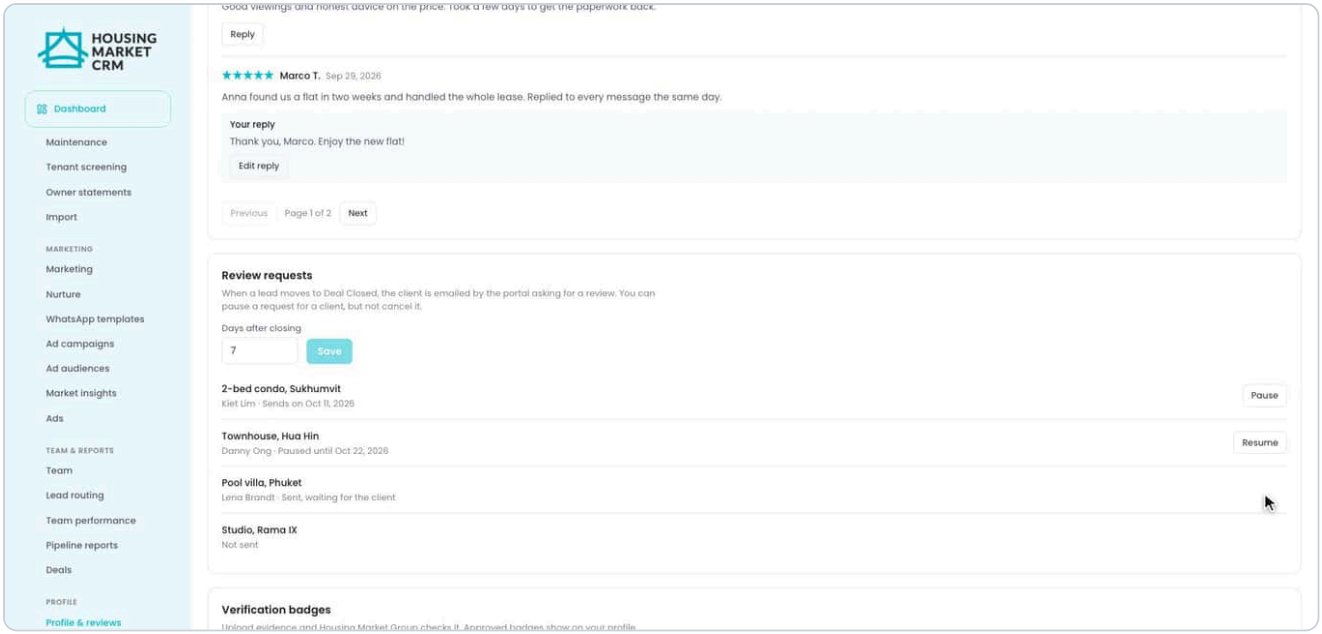


Figure 98.10 · Screen recorded 8 October 2026

RELATED HELP CENTER ARTICLES

How do I become a verified agent? faq.housingmarketgroup.com/faq/how-do-i-become-a-verified-agent

99 CHAPTER 99

Deals, forecast and statements

Business | For agents | Watch the video

OVERVIEW

Yes. Recording a deal, its value and its commission is part of Pro; dividing the commission between people, the forecast and the commission statement are part of Business.

Each deal records the property, its value, the commission due — a rate on the value or a flat fee — and how that commission is split between the people who worked it. A split must add up to the whole commission or it is refused, and only agents you can already see in your office can be named on it; anyone else is recorded as an outside party.

A deal moves through Pending, Won, Invoiced and Paid, or is marked Lost, so the office can answer what each person is owed and when. Nothing moves out of Paid, and a lost deal can be brought back to Pending if it comes alive again.

The pipeline forecast is built from the open deals and their expected close dates. It is calculated fresh every time you open it, so a deal closed a minute ago is already reflected rather than waiting for an overnight update. Each currency is forecast on its own and never added to another.

Recording deals and carrying them through to closing is part of Pro and Business. The commission split, the Forecast tab and the Statement tab are part of Business. See "How do I turn a lead into a deal?" and "How do I invoice a deal, and who is owed what?".

From the Help Center: **Can I track commission and forecast my pipeline?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

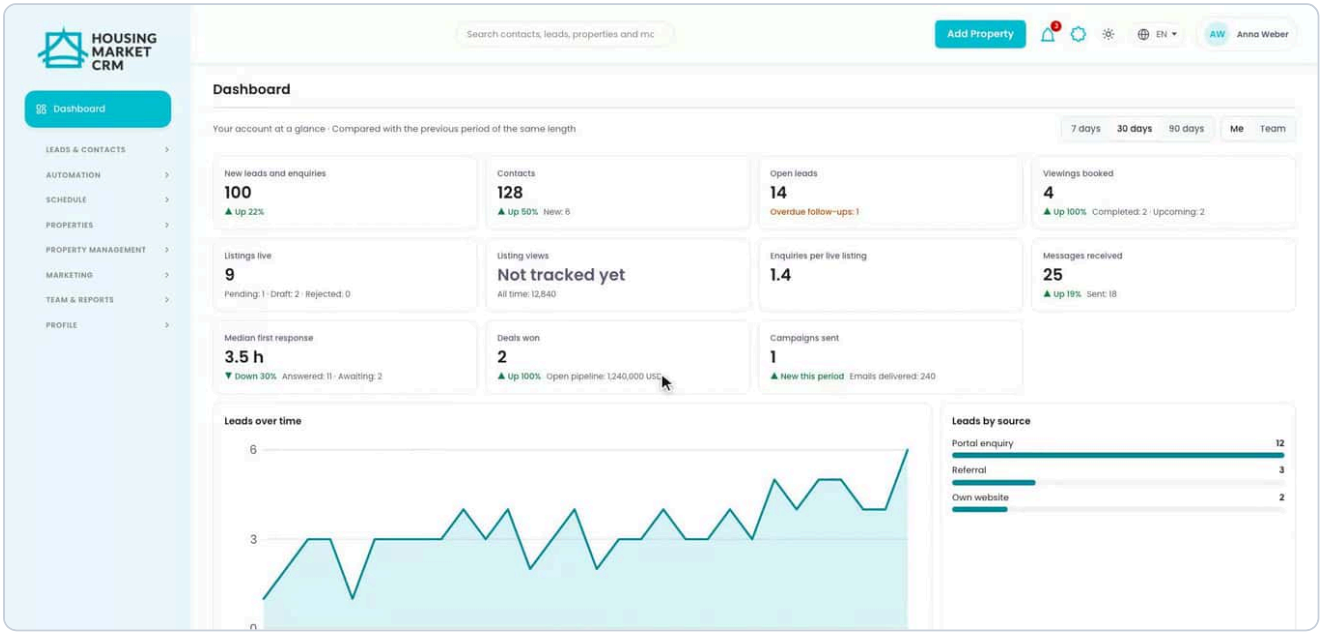


Figure 99.1 · Screen recorded 23 October 2026

2 Open **Team & reports** in the left menu.

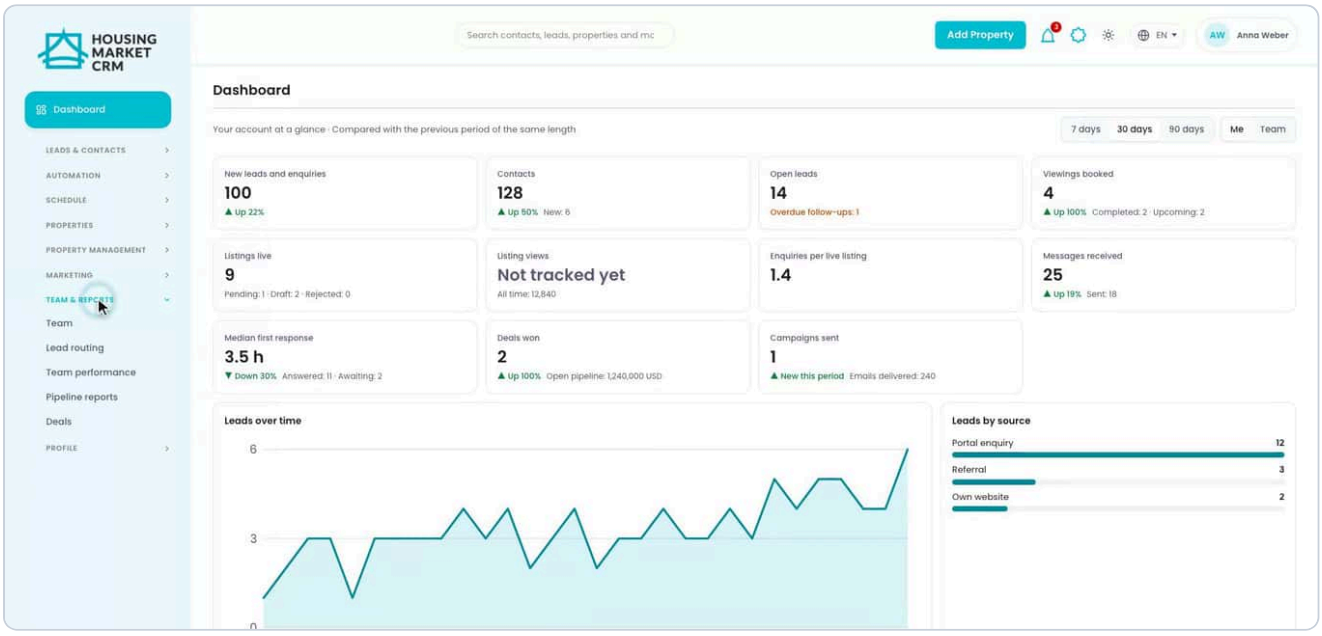


Figure 99.2 · Screen recorded 23 October 2026

3 Click **Deals**.

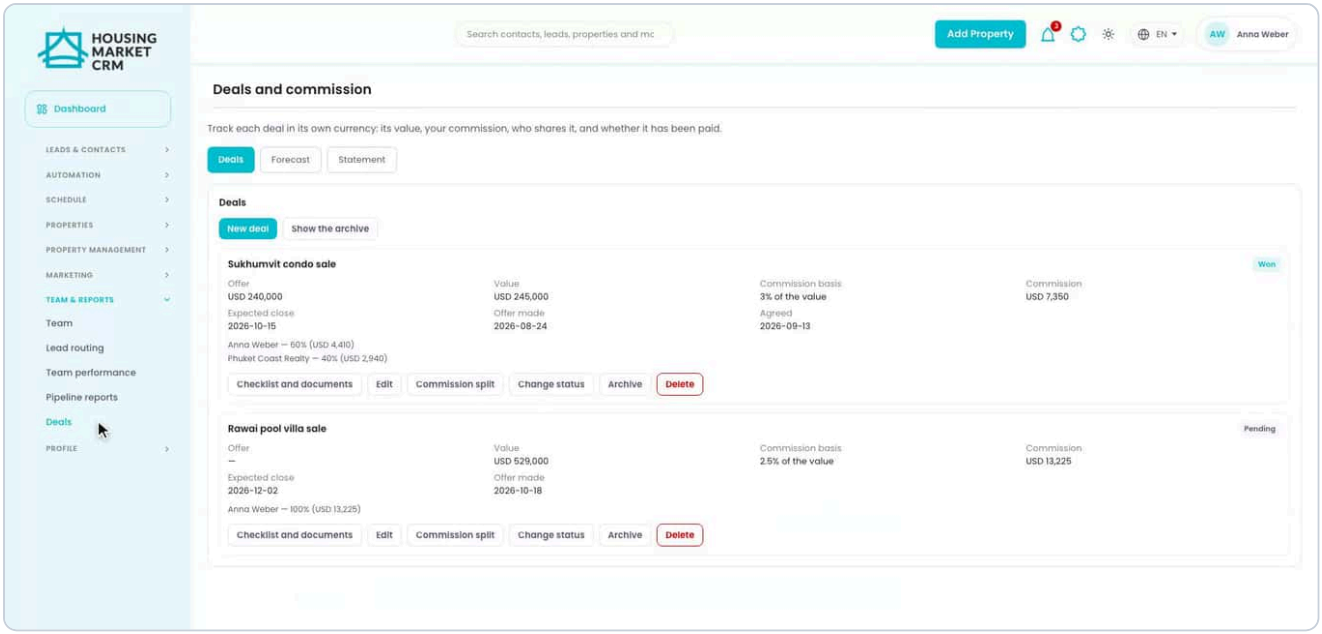


Figure 99.3 · Screen recorded 23 October 2026

4 Besides your **Deals**, there are two more tabs.

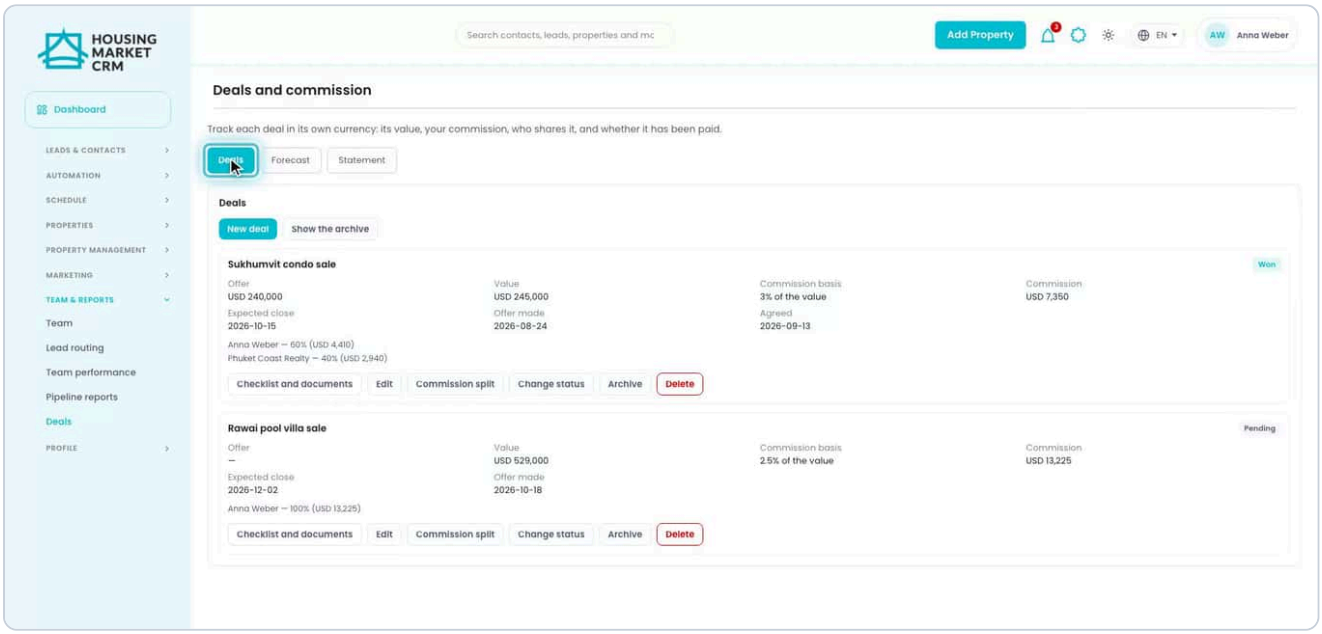


Figure 99.4 · Screen recorded 23 October 2026

5 Open **Forecast**.

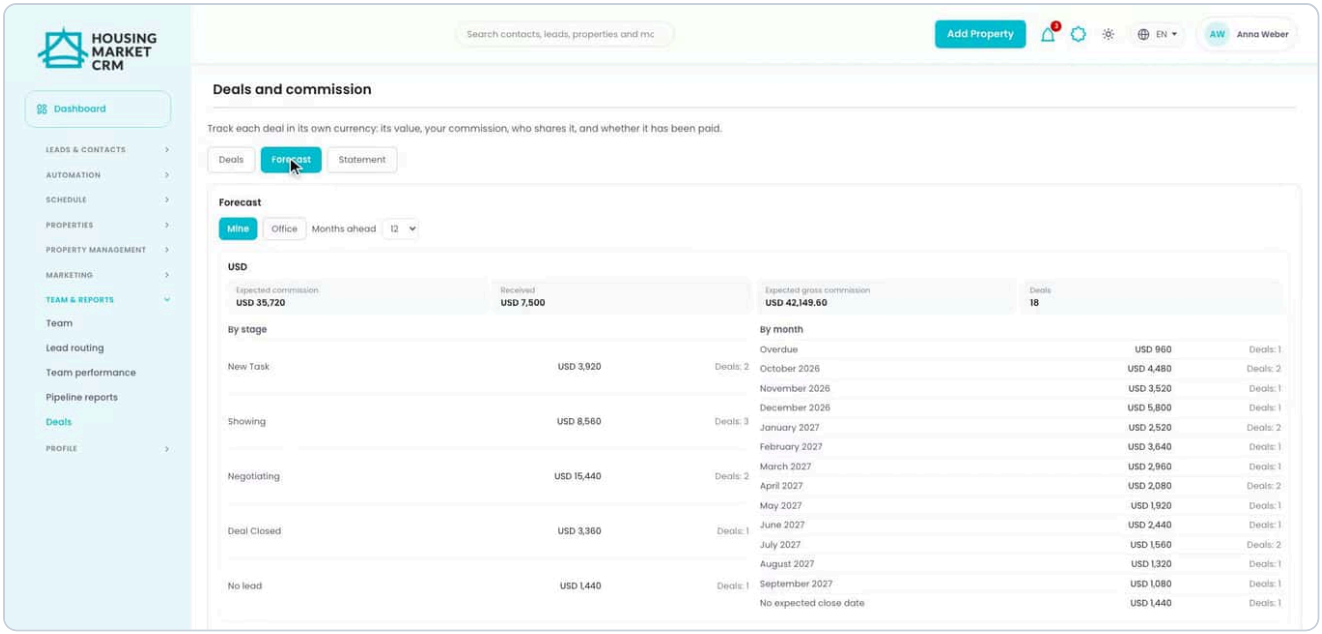


Figure 99.5 · Screen recorded 23 October 2026

6 **Expected commission** is what your open deals should earn.

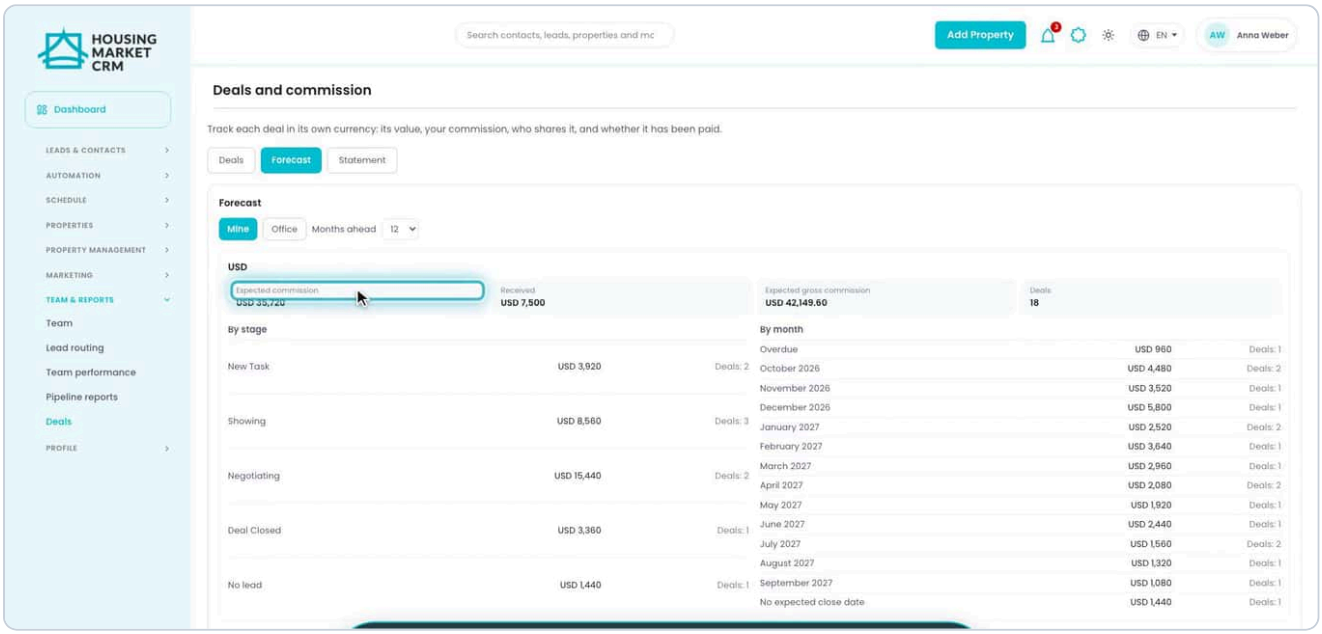


Figure 99.6 · Screen recorded 23 October 2026

7 **Received** is what has already been paid.

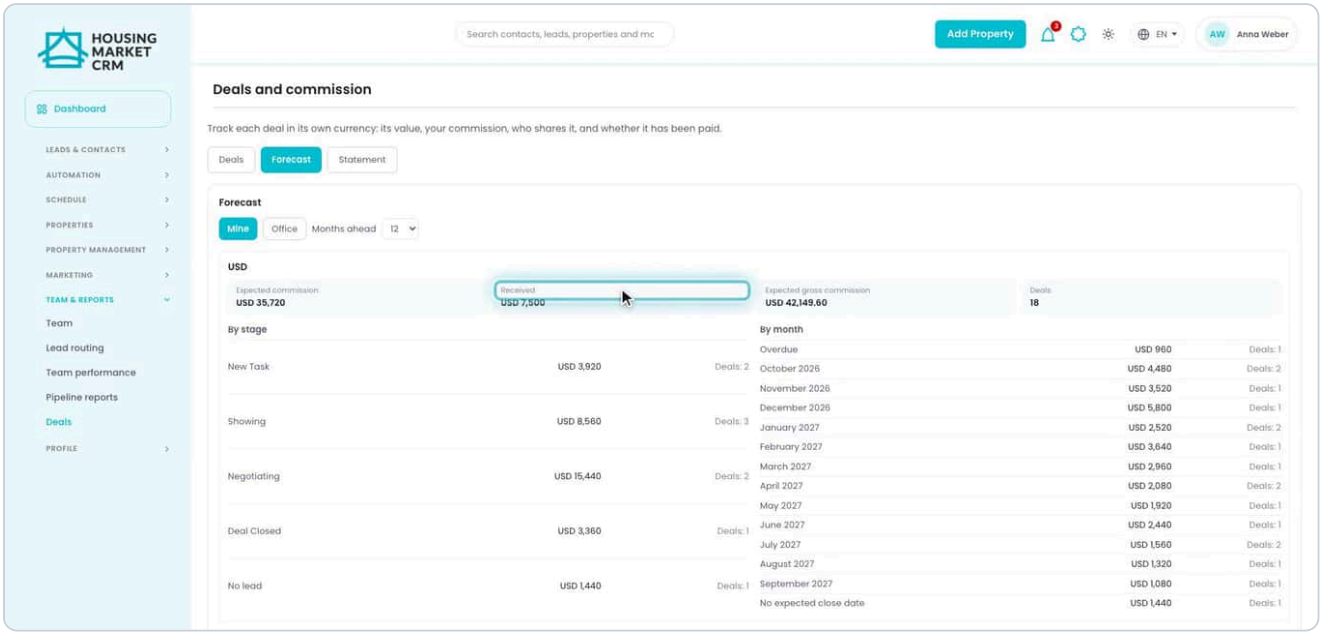


Figure 99.7 · Screen recorded 23 October 2026

8 **By stage** shows where in the sales process the money sits.

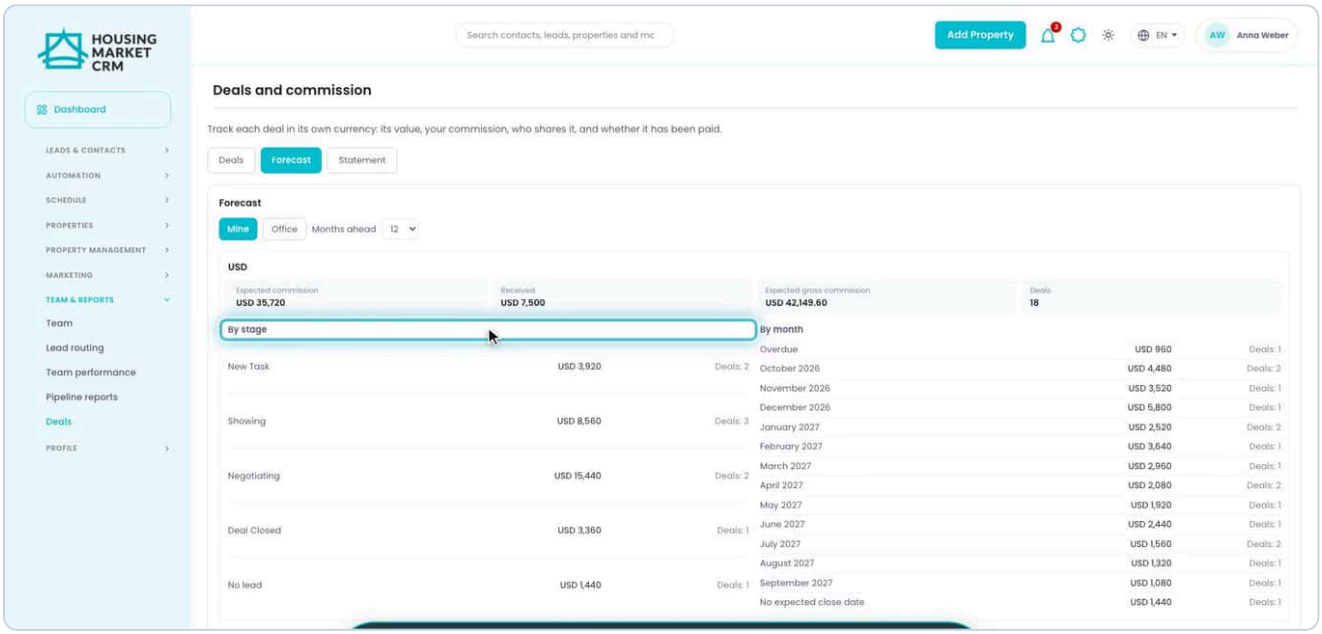


Figure 99.8 · Screen recorded 23 October 2026

9 **By month** shows when deals are expected to close.

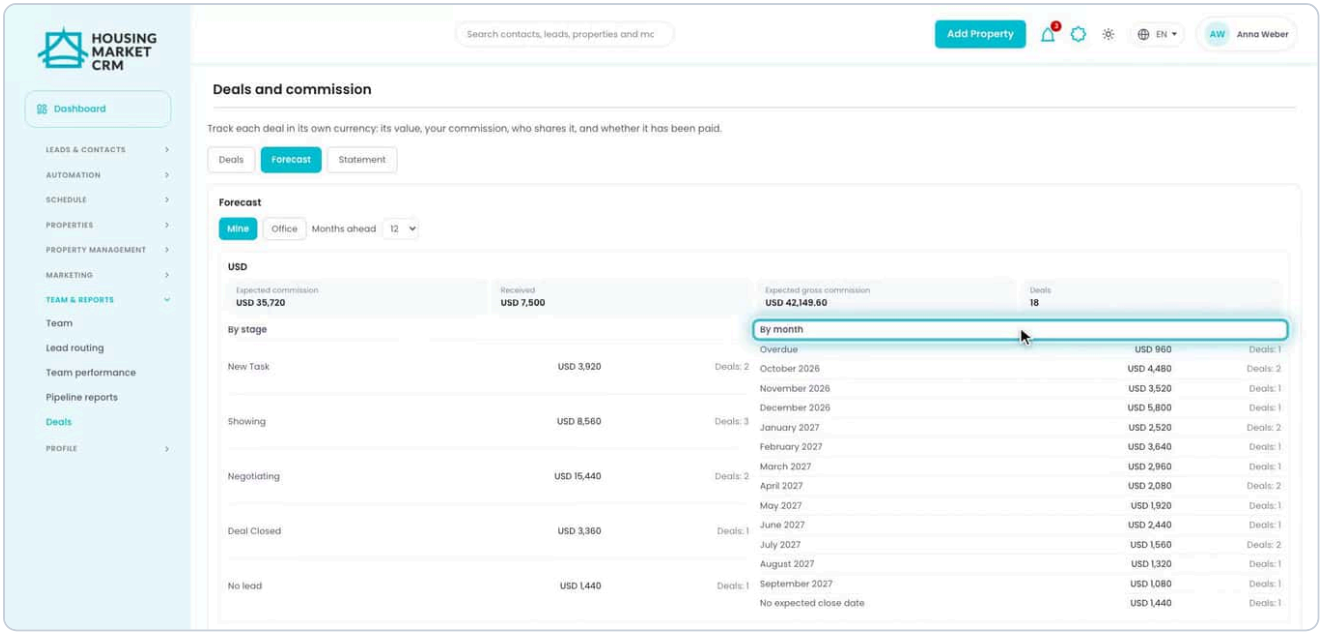


Figure 99.9 · Screen recorded 23 October 2026

10 Switch to **Office** to include your colleagues.

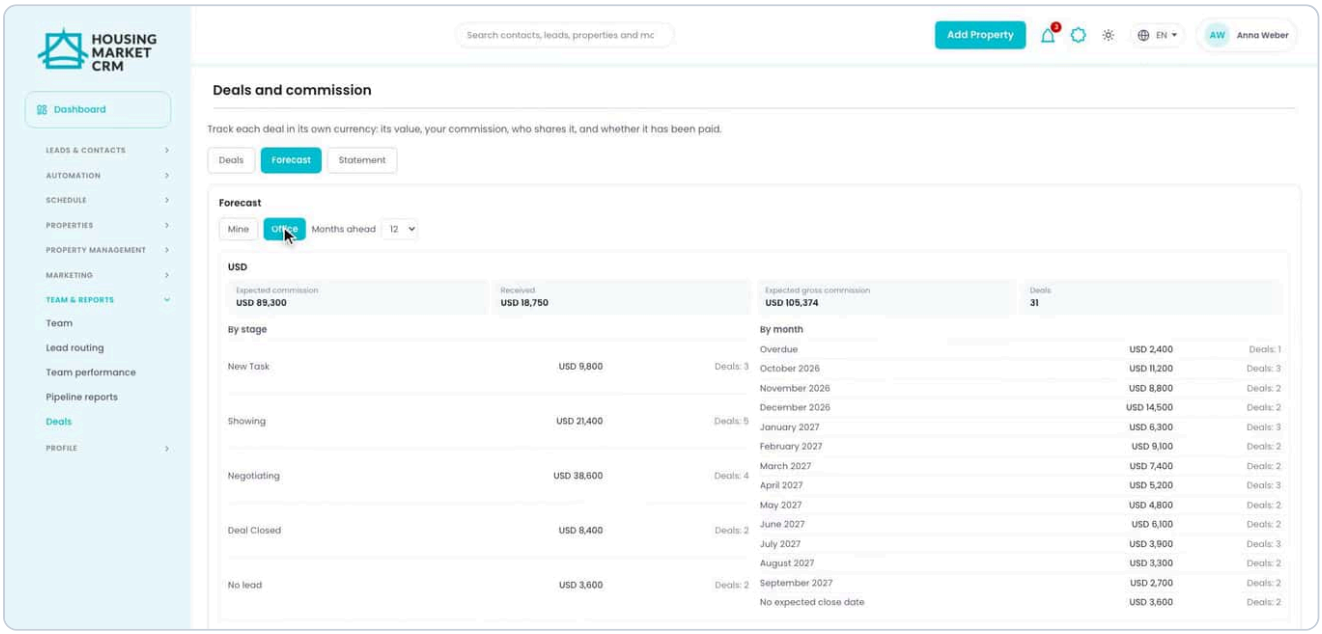


Figure 99.10 · Screen recorded 23 October 2026

11 Switch back to **Mine** for your own share.

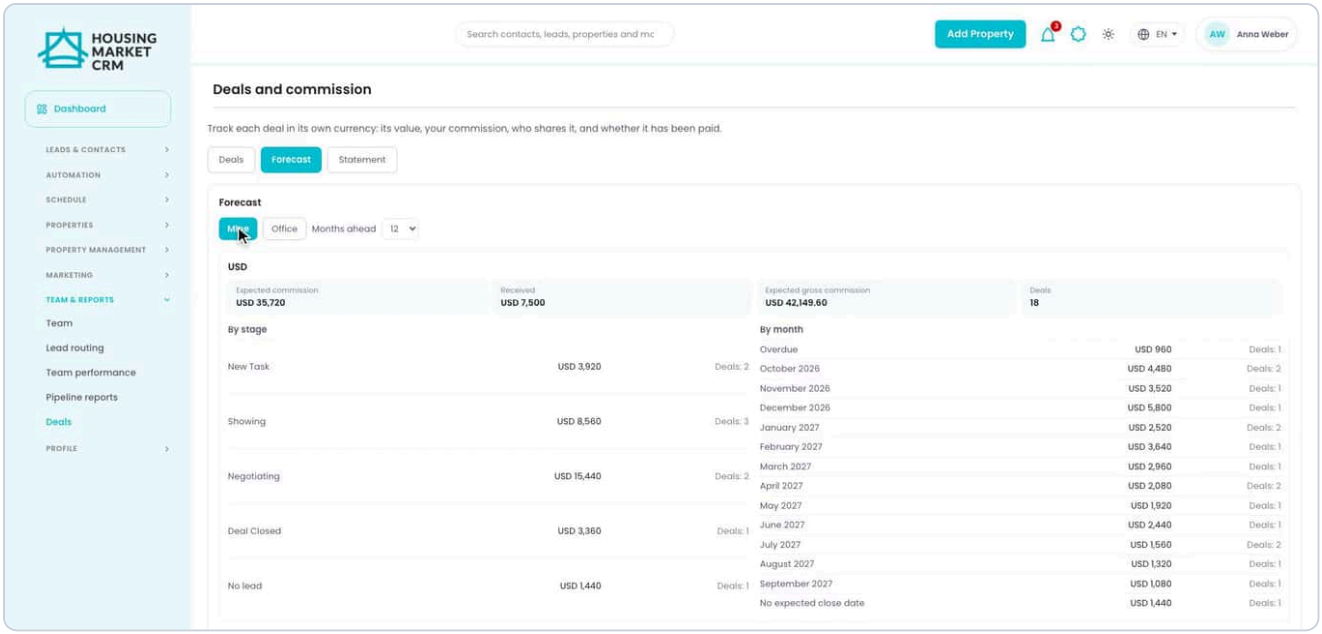


Figure 99.11 · Screen recorded 23 October 2026

12 Choose how many **months ahead** to look.

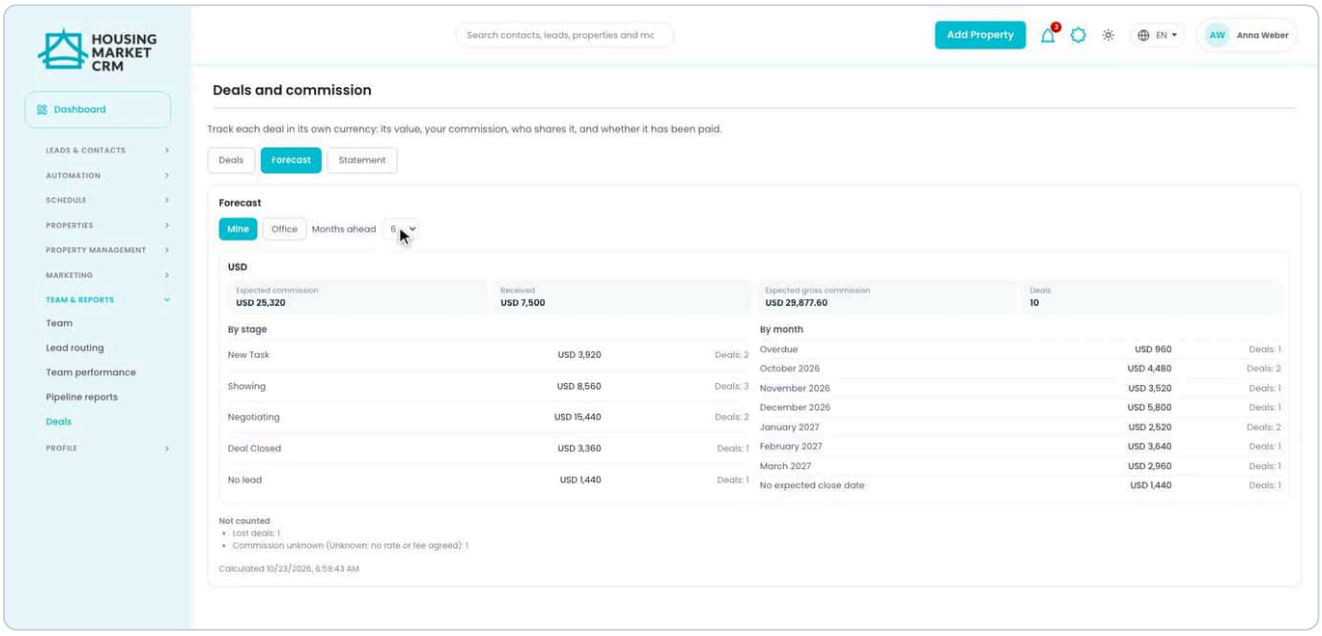


Figure 99.12 · Screen recorded 23 October 2026

13 **Not counted** lists the deals that are left out, and why.

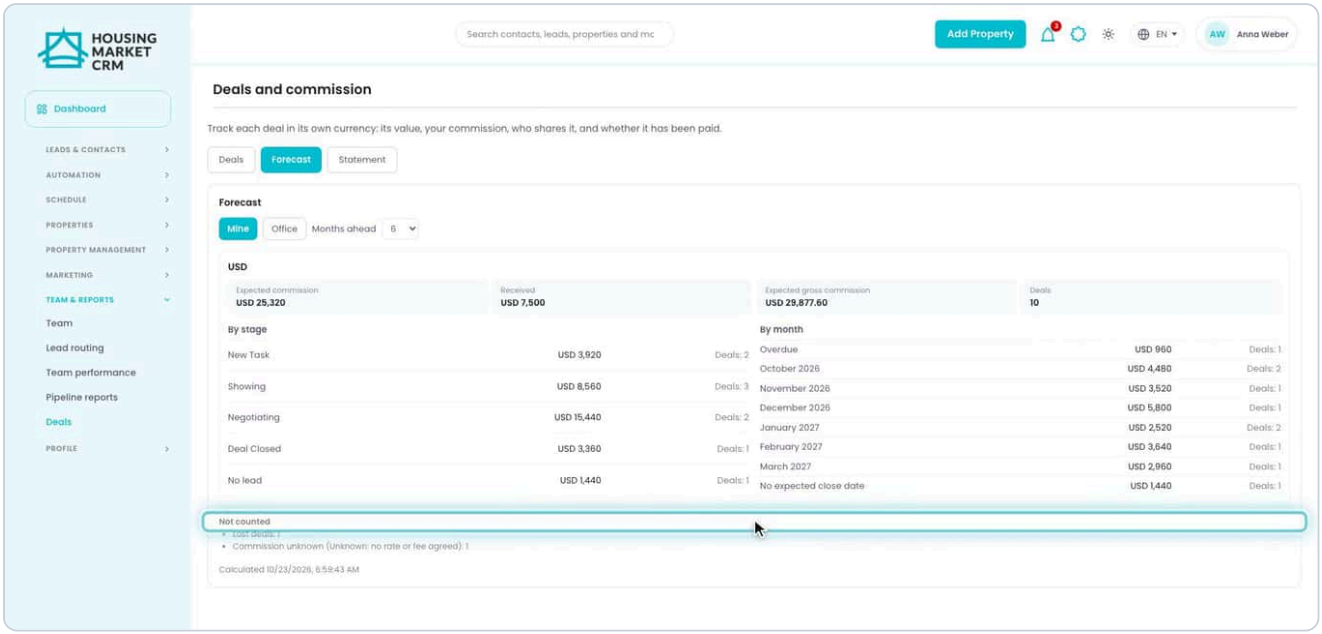


Figure 99.13 · Screen recorded 23 October 2026

14 Open **Statement** to see who is owed what.

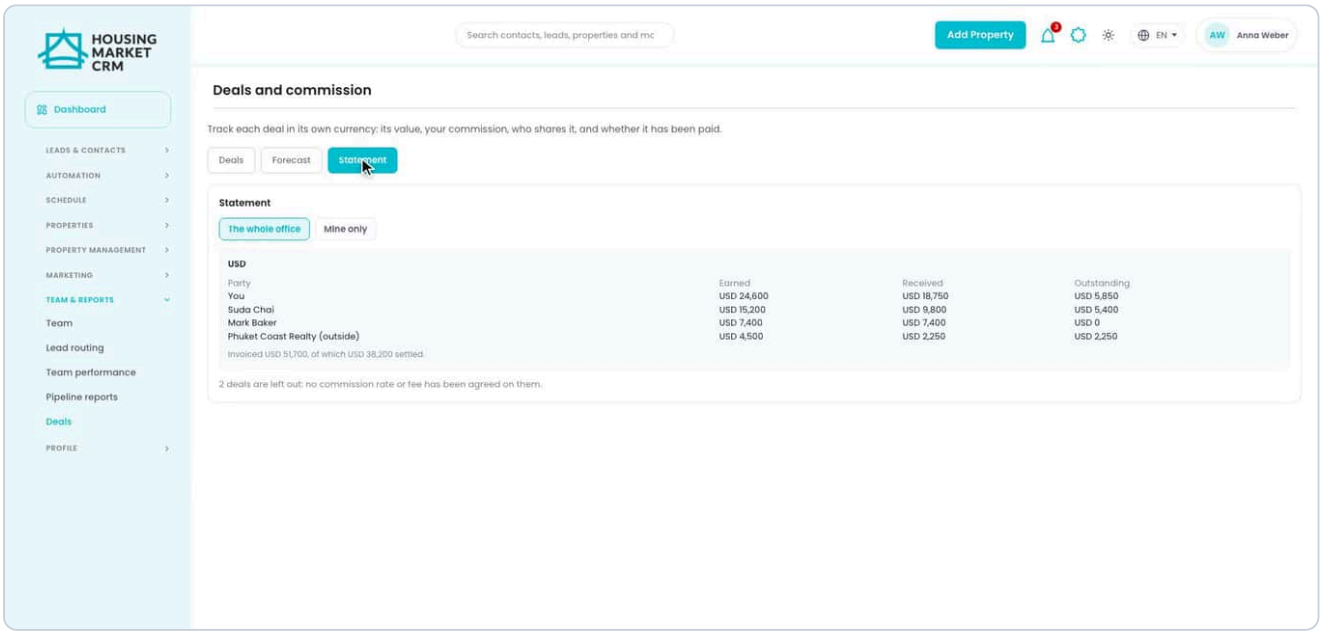


Figure 99.14 · Screen recorded 23 October 2026

15 Each person has **earned**, **received** and **outstanding** amounts.

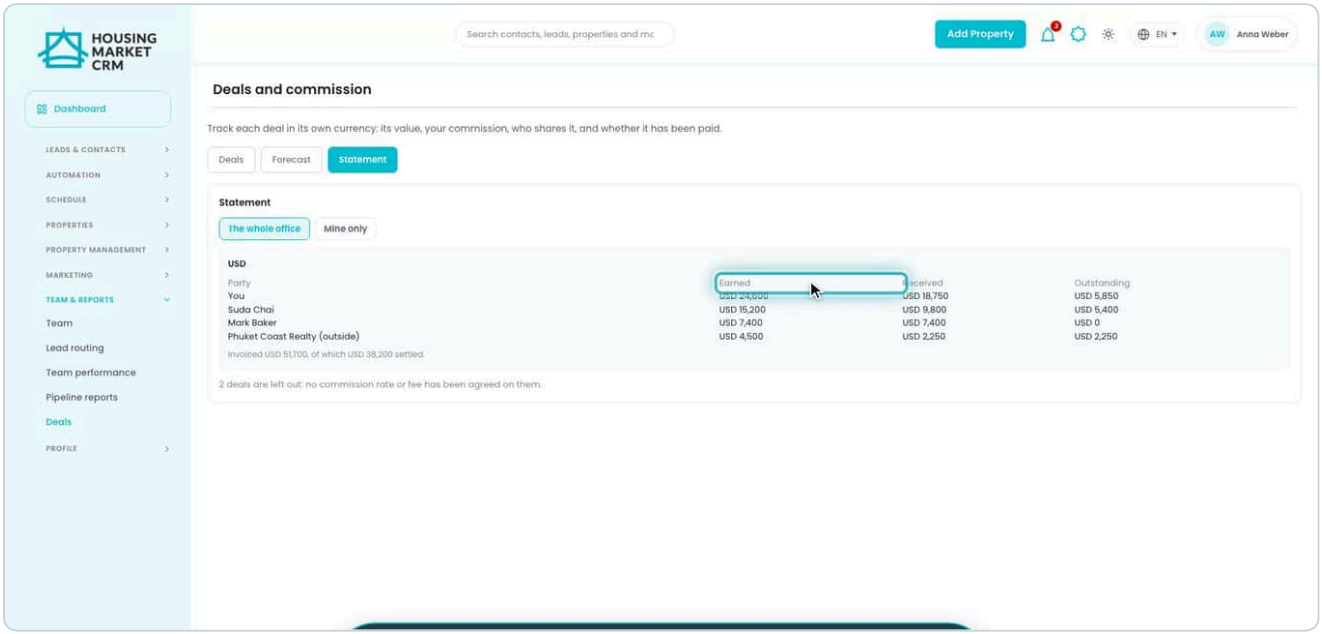


Figure 99.15 · Screen recorded 23 October 2026

16 Outside partners are listed too.

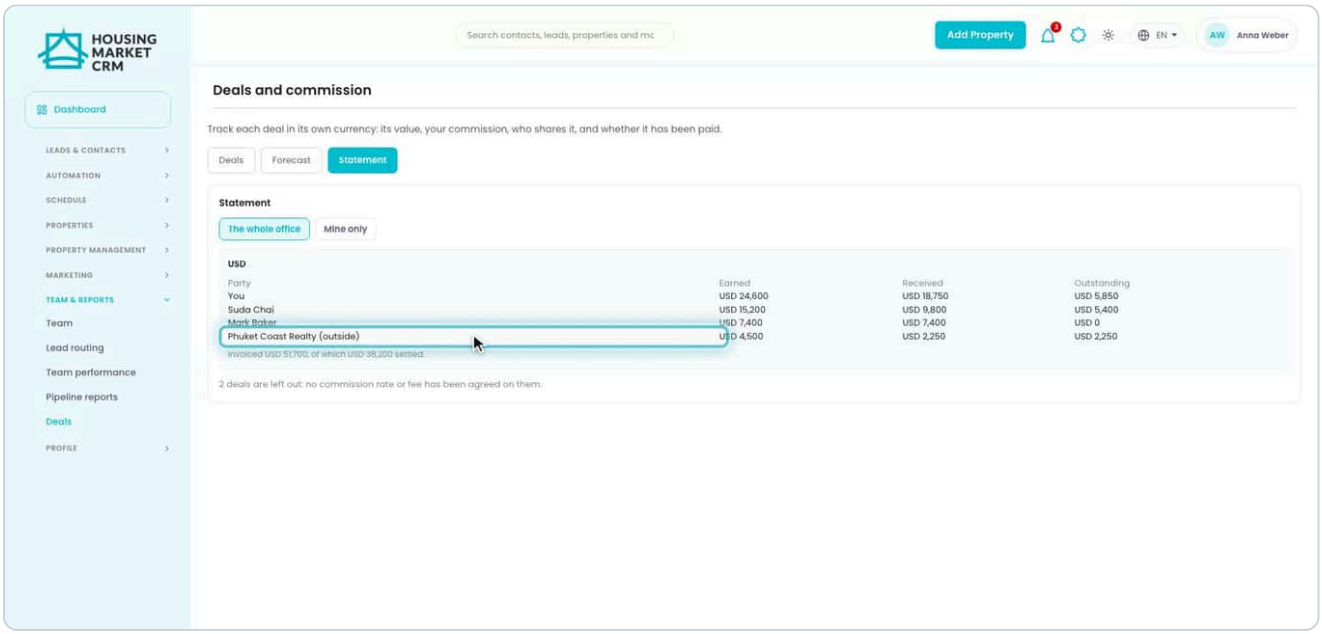


Figure 99.16 · Screen recorded 23 October 2026

17 What the office has **invoiced** sits beside it, never netted against it.

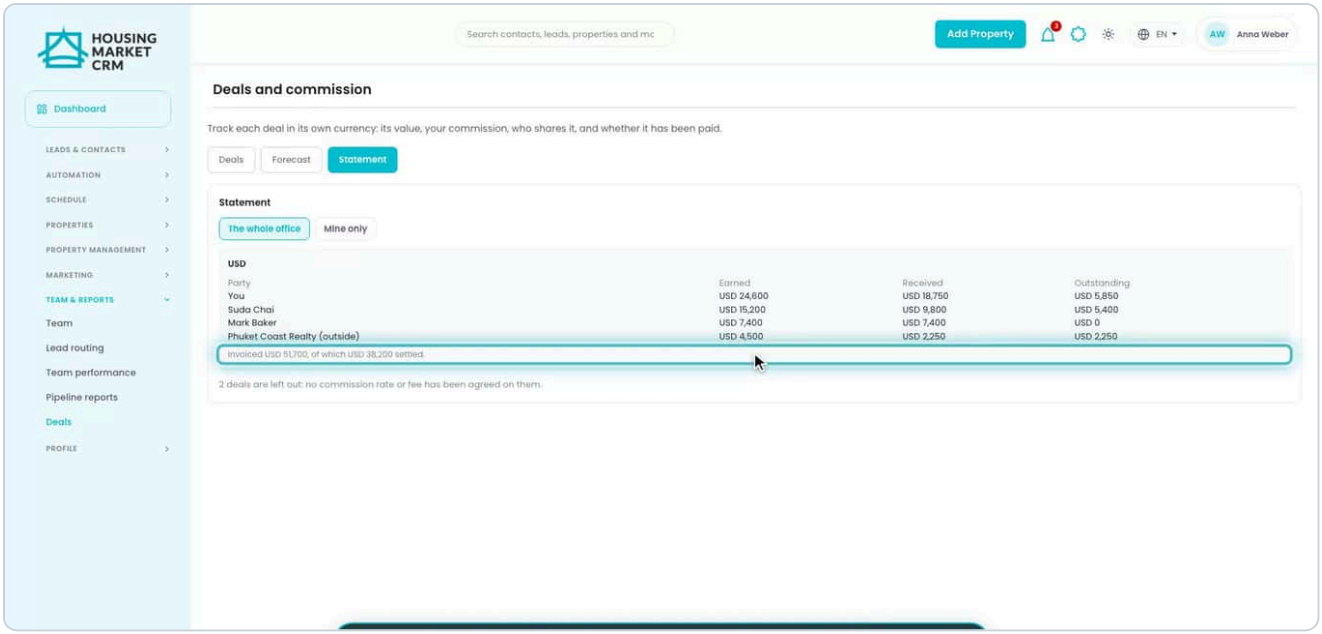


Figure 99.17 · Screen recorded 23 October 2026

18 Choose **Mine only** for just your own statement.

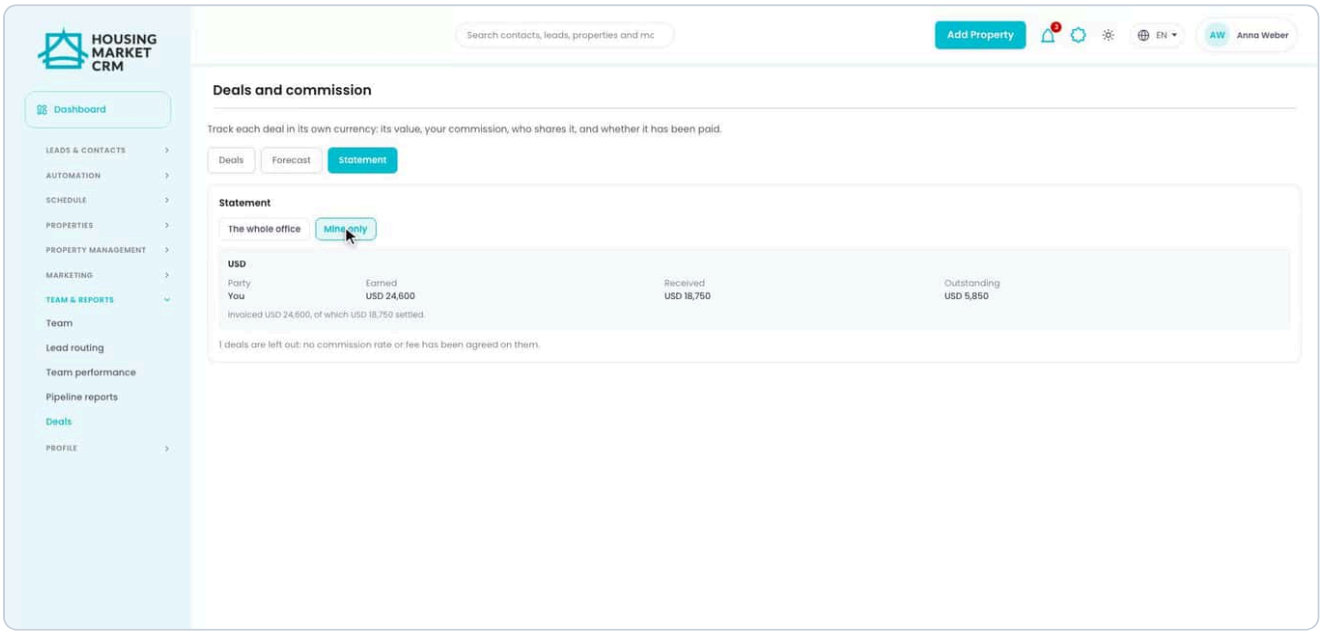


Figure 99.18 · Screen recorded 23 October 2026

RELATED HELP CENTER ARTICLES

How do I invoice a deal, and who is owed what?	faq.housingmarketgroup.com/faq/how-do-i-invoice-a-deal-and-who-is-owed-what
What do pipeline reports show?	faq.housingmarketgroup.com/faq/what-do-pipeline-reports-show

100 CHAPTER 100

Send a contract for signing by email

Pro and Business | For agents | Watch the video

OVERVIEW

Open a contract and send it for signature. Each party is emailed a private link that needs no account and no password, and expires after fourteen days. They draw or type a signature; it is bound to the exact text they were shown. This is part of Pro.

Open a contract generated from one of your templates and choose to send it for signature. It is part of Pro, the same as signing in person, and it is how a seller in another country, a landlord who will not come in or a co-broke agent signs the same document as the person sitting across your desk.

Sending it

Give each party a name, an email address and a role — agent, buyer, seller, tenant, landlord or witness. Up to ten parties go on one send, and each is emailed separately with a link of their own. The email is sent from Housing Market CRM, names you as the person who sent it, and is written in your language.

This page is about a contract generated from one of your templates, because signing binds a signature to the text of the document. A PDF you uploaded is sent from its own window and works a little differently: see "How do I send an uploaded PDF for signature?".

What the signer does

They open the link, read the contract, and either draw a signature with a finger, a stylus or a mouse, or type their name and have it written out. Either way the same picture is stored. They can also decline — "I will not sign" — with a reason if they want to give one, and a decline is kept rather than deleted.

There is no account, no password and no code to enter. Holding the link is what authorises the signature, which is exactly what the link is for and also its limit — see the last section.

A link lasts fourteen days, can be used once, and is for one document and one signer. You can withdraw it before then. Every party can sign at any time and in any order; the order you listed them in is kept as a record of your intent and nothing holds anyone back.

It is bound to the text they were shown

The signature is tied to the exact wording on the screen at the moment of signing. If the contract was edited after the link went out, signing is refused and the signer is told the document changed rather than being left clicking a link that looks broken. The first signature locks the text, so everybody signs the same document.

A signed contract is never deleted, and neither is a document that has been sent for signature — it can be archived.

Following it up, and the record you can keep

Each party shows as sent and not yet opened, opened and not yet signed, signed, declined, expired, or withdrawn. The CRM records when the link was first opened, once, rather than every time — a row per read would be a browsing log of somebody who is not your customer. Nothing chases them: there are no reminder emails, and sending again is a deliberate act.

A signature record can be downloaded for a signed contract. It reproduces the contract, and for each signature gives the name, the role, the email address, whether it was signed remotely or in person, the time in UTC, the network address it came from, the browser, and a digest of the text that was signed. It also lists anybody who was asked and has not signed.

What it proves, and what it does not

It shows that somebody with access to that email address signed, at that time, against that wording. It does not show who they are. No identity document is checked, no identity is verified, and nobody witnesses the signing.

The signing is ours end to end, on our own infrastructure, and there is no outside party involved: no third-party certificate, no external timestamp, and nothing an authority anywhere recognises as more than our own record. Housing Market Group states the facts it recorded and does not tell you what those facts mean under any country's law — that is a question for your own adviser, and it is worth asking before you rely on this for something that matters.

Signing in person on your own device is unchanged and works the same way. See "How do documents, contracts and leases work?".

From the Help Center: **How do I send a document to be signed remotely?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

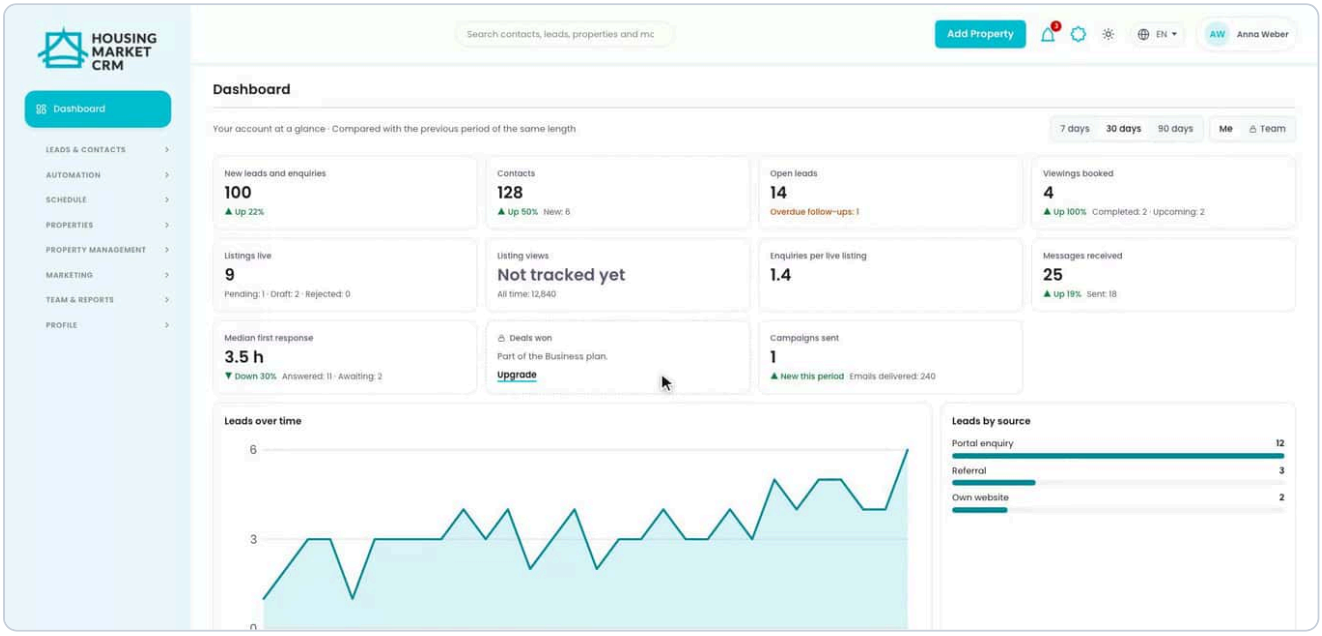


Figure 100.1 · Screen recorded 23 October 2026

2 Open **Properties** in the left menu.

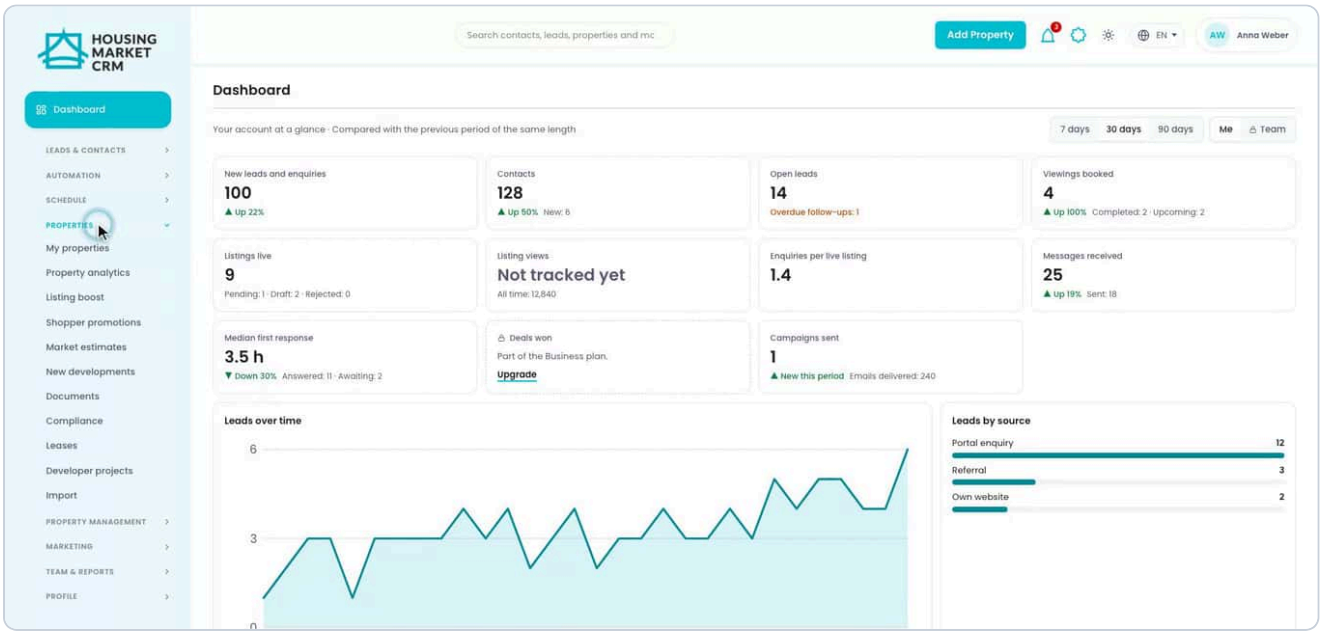


Figure 100.2 · Screen recorded 23 October 2026

3 Click **Documents**.

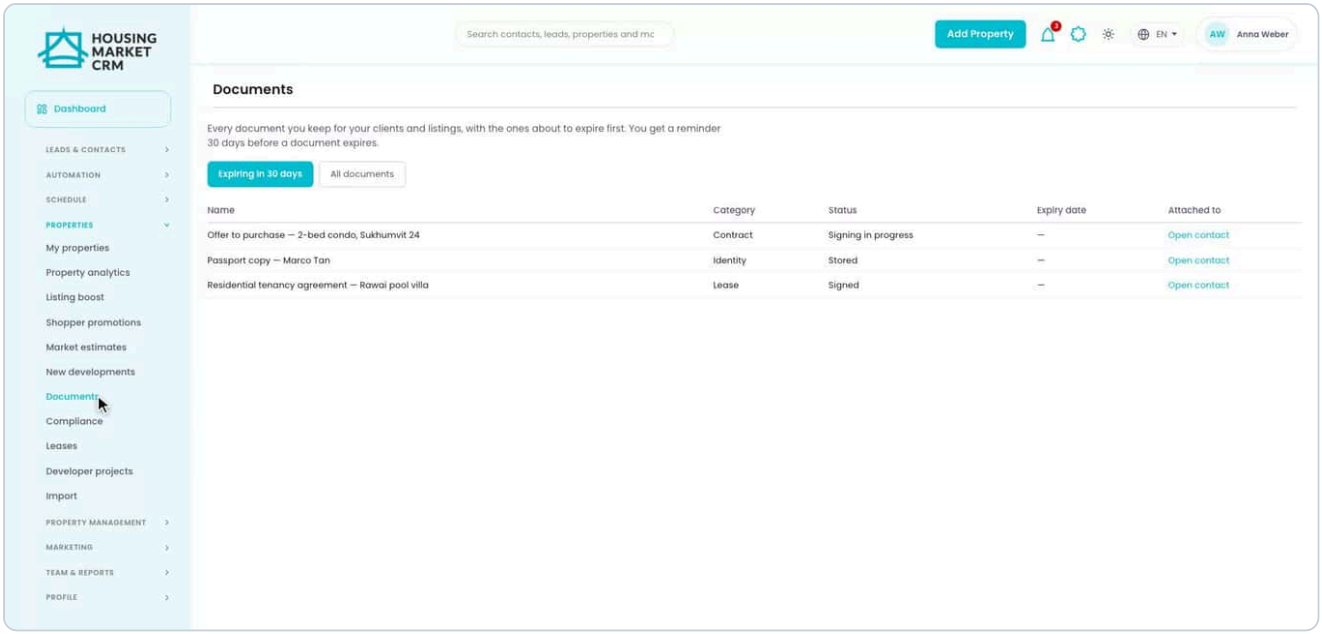


Figure 100.3 · Screen recorded 23 October 2026

4 Your contracts are kept with the **contact** they belong to.

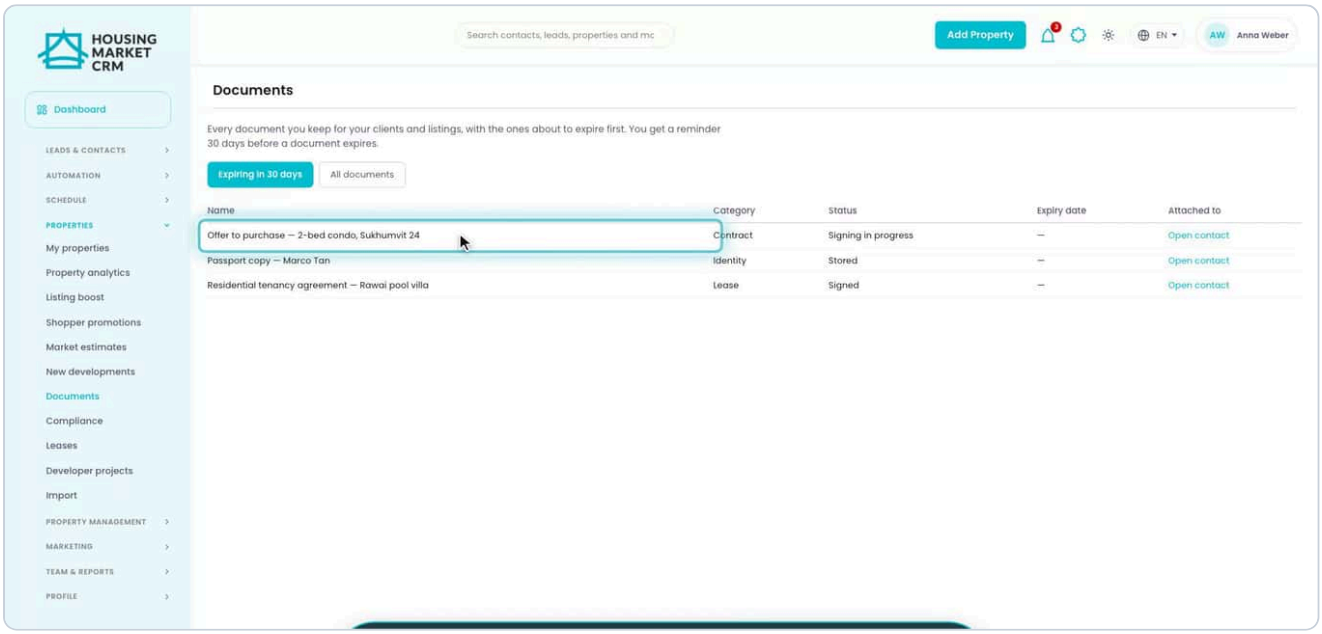


Figure 100.4 · Screen recorded 23 October 2026

5 Click **Open contact**.

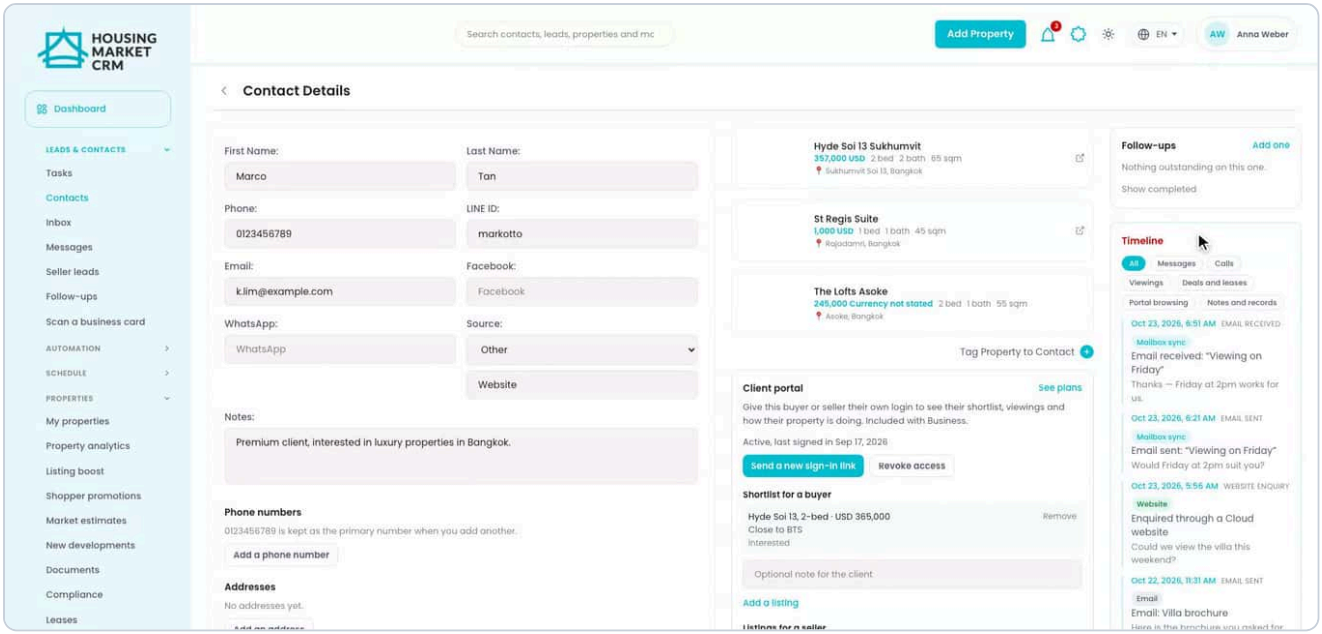


Figure 100.5 · Screen recorded 23 October 2026

6 Open the contract you want signed.

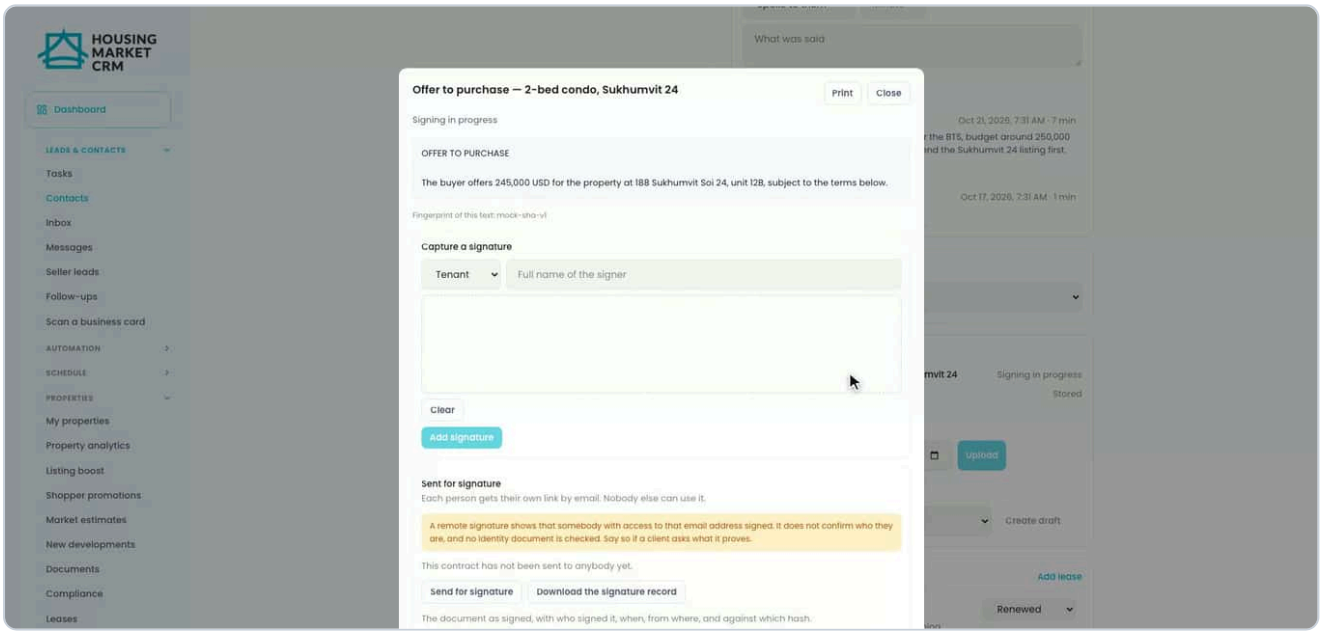


Figure 100.6 · Screen recorded 23 October 2026

7 Below the in-person signature is **Sent for signature**.

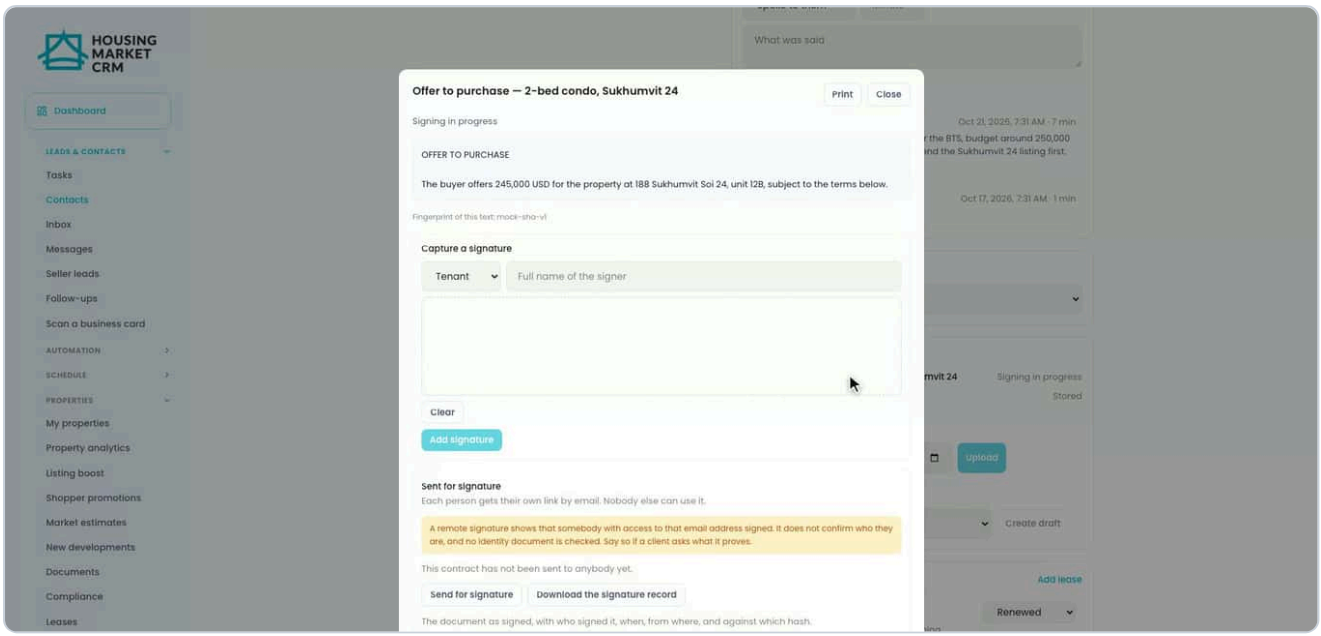


Figure 100.7 · Screen recorded 23 October 2026

8 Read the note: a remote signature shows **access to an email address**, not identity.

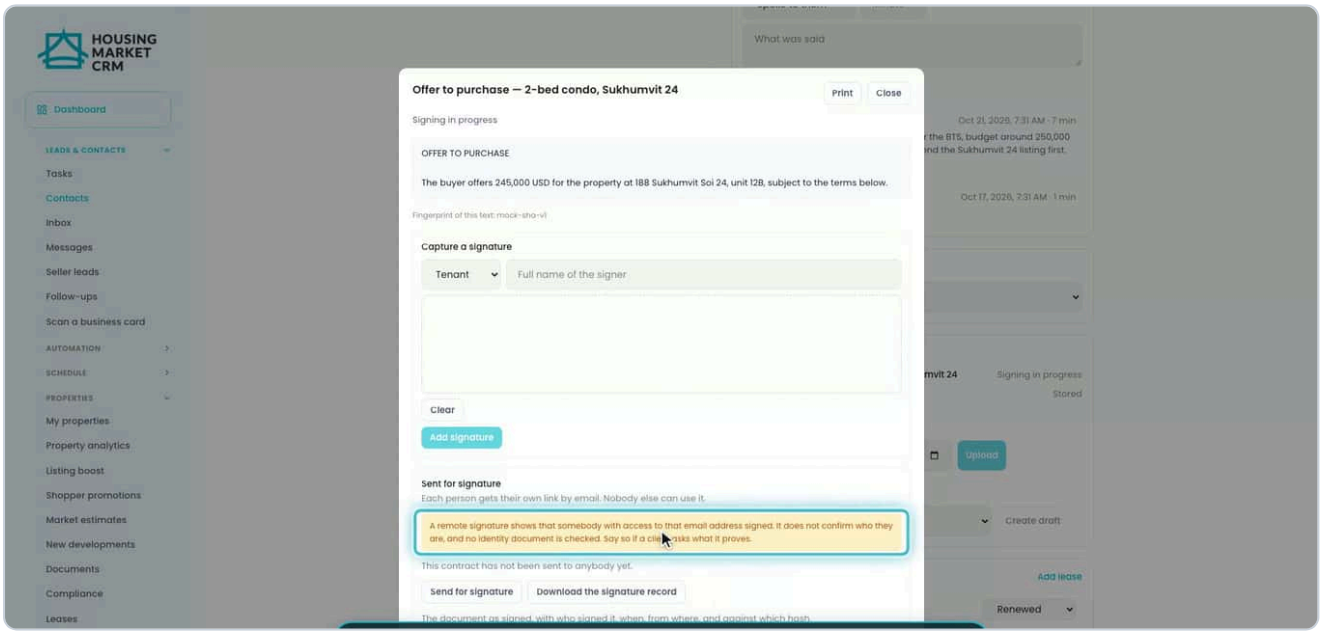


Figure 100.8 · Screen recorded 23 October 2026

9 Click **Send for signature.**

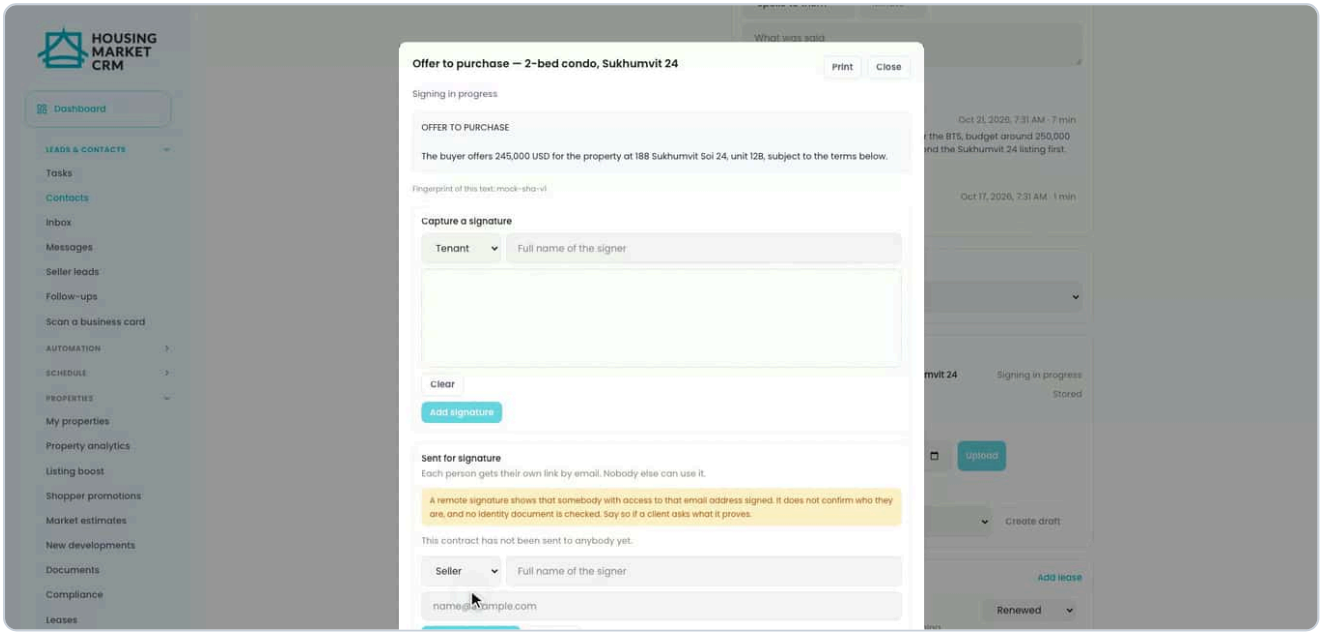


Figure 100.9 · Screen recorded 23 October 2026

10 Choose who is signing.

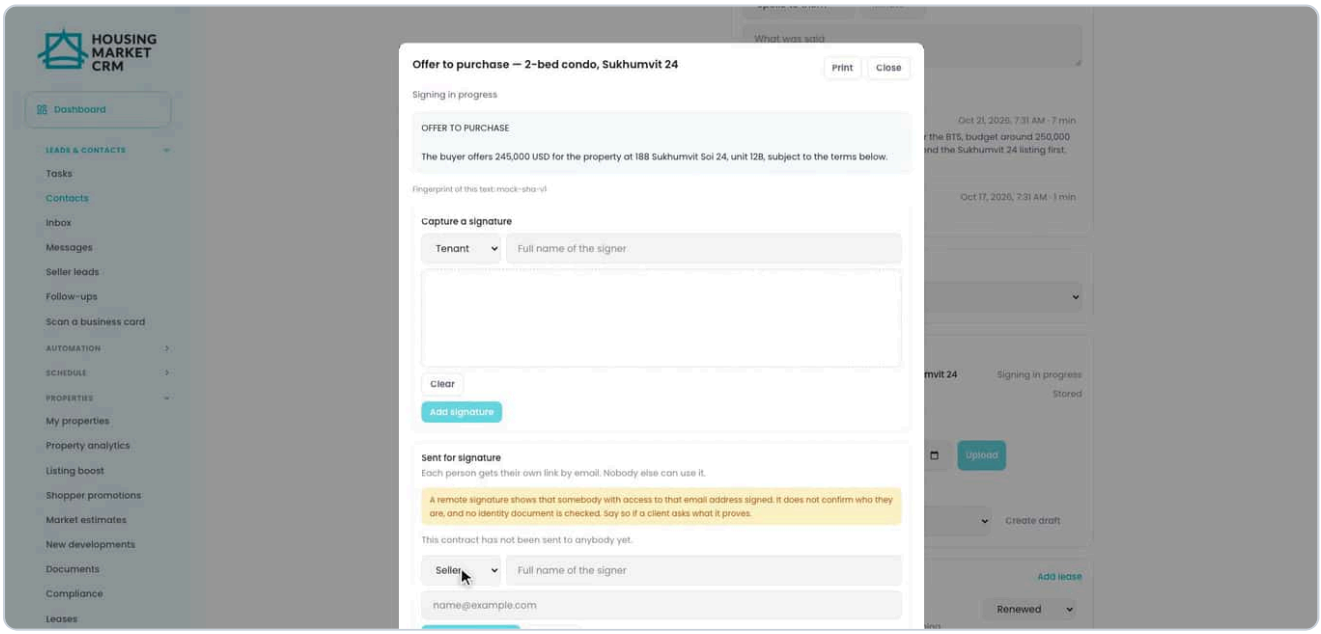


Figure 100.10 · Screen recorded 23 October 2026

11 Type their **name** and their **email address**.

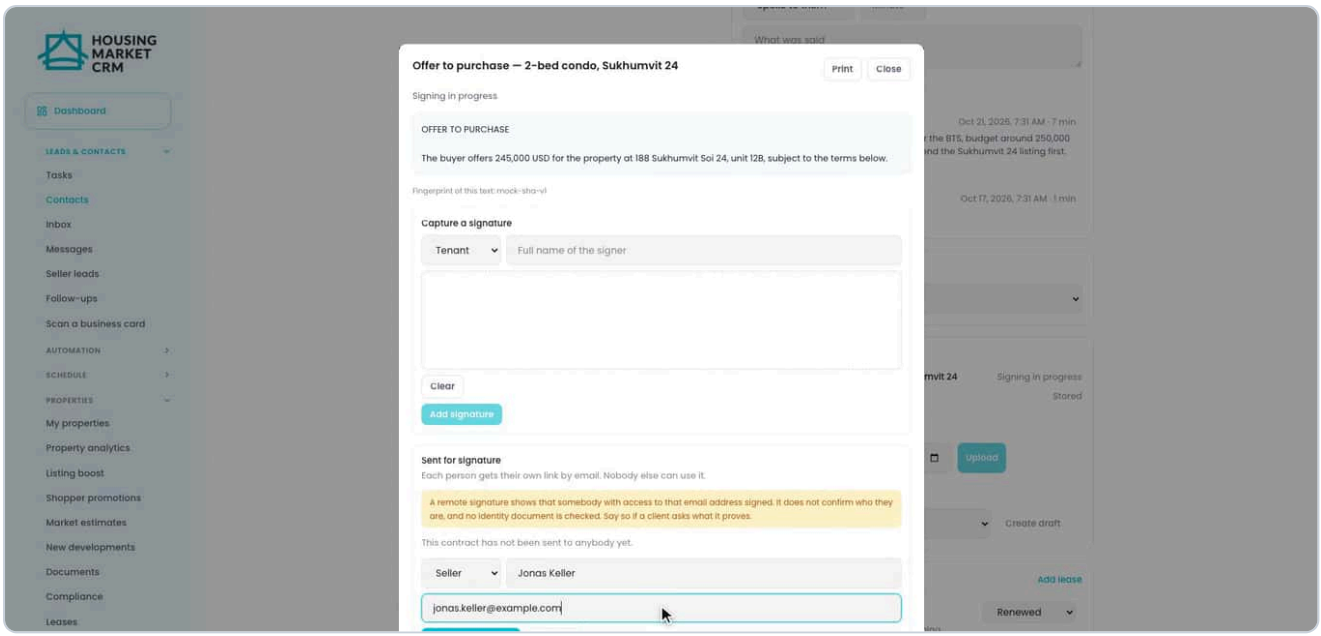


Figure 100.11 · Screen recorded 23 October 2026

12 Click **Send for signature**.

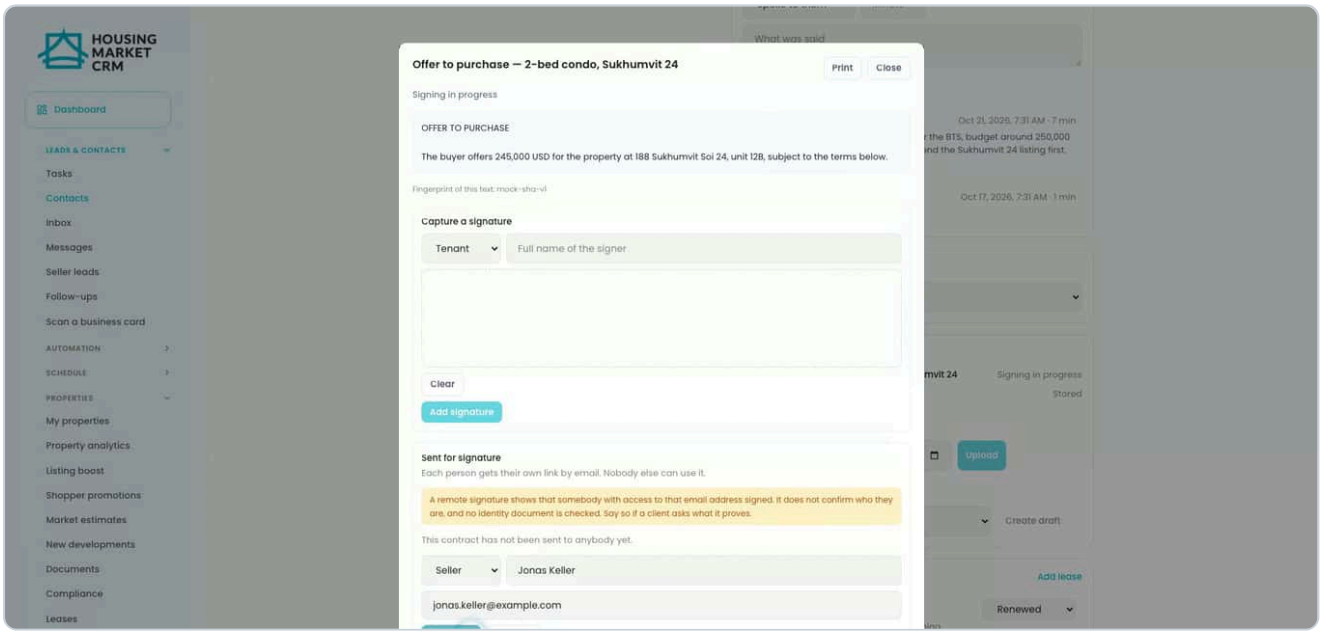


Figure 100.12 · Screen recorded 23 October 2026

13 The signer appears with their **status**.

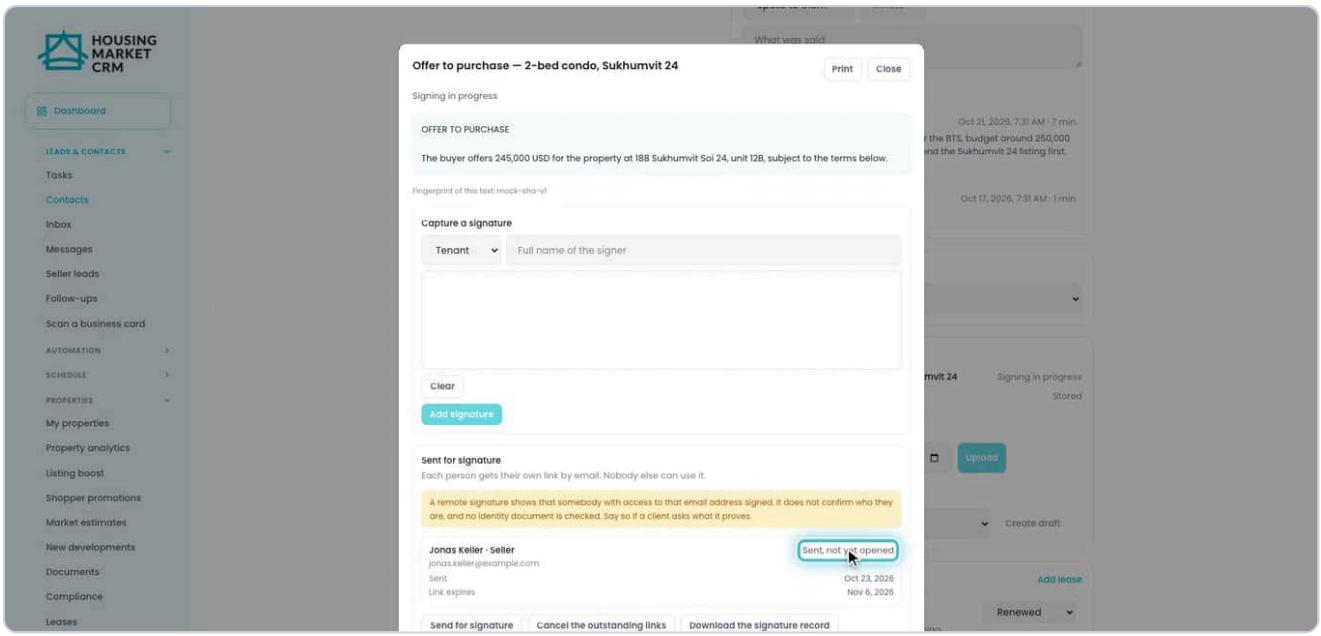


Figure 100.13 · Screen recorded 23 October 2026

14 The link **expires** after two weeks.

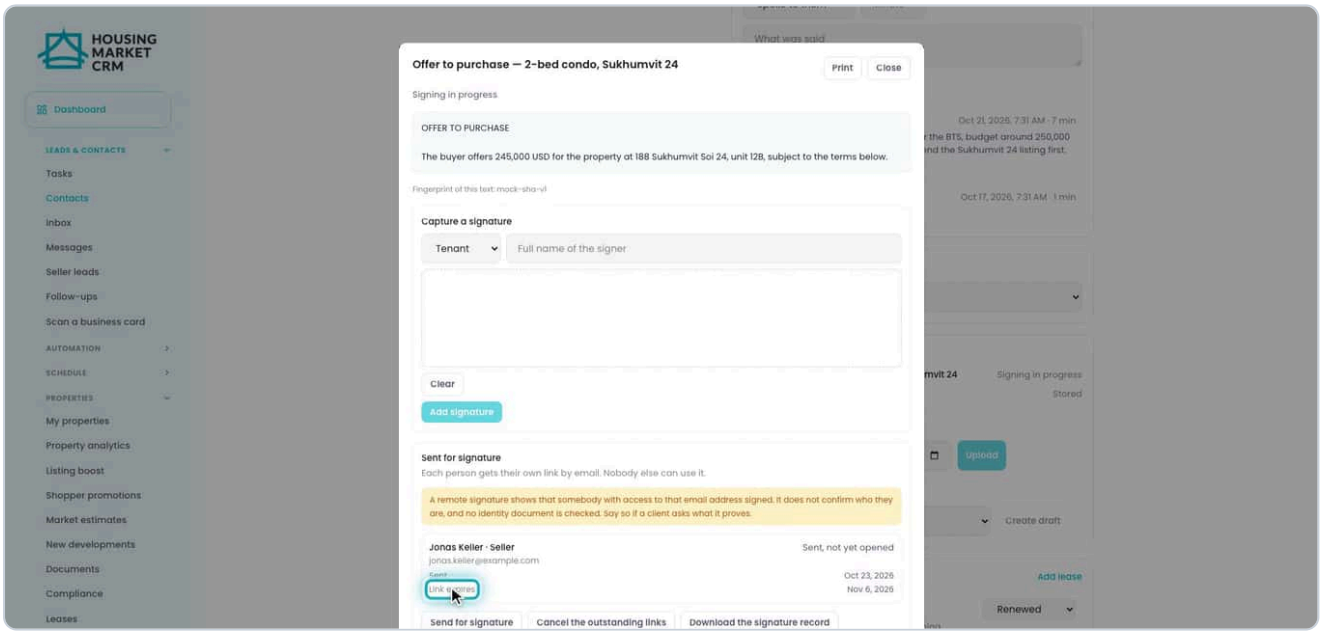


Figure 100.14 · Screen recorded 23 October 2026

15 You never see the link itself, so it cannot be forwarded by mistake.

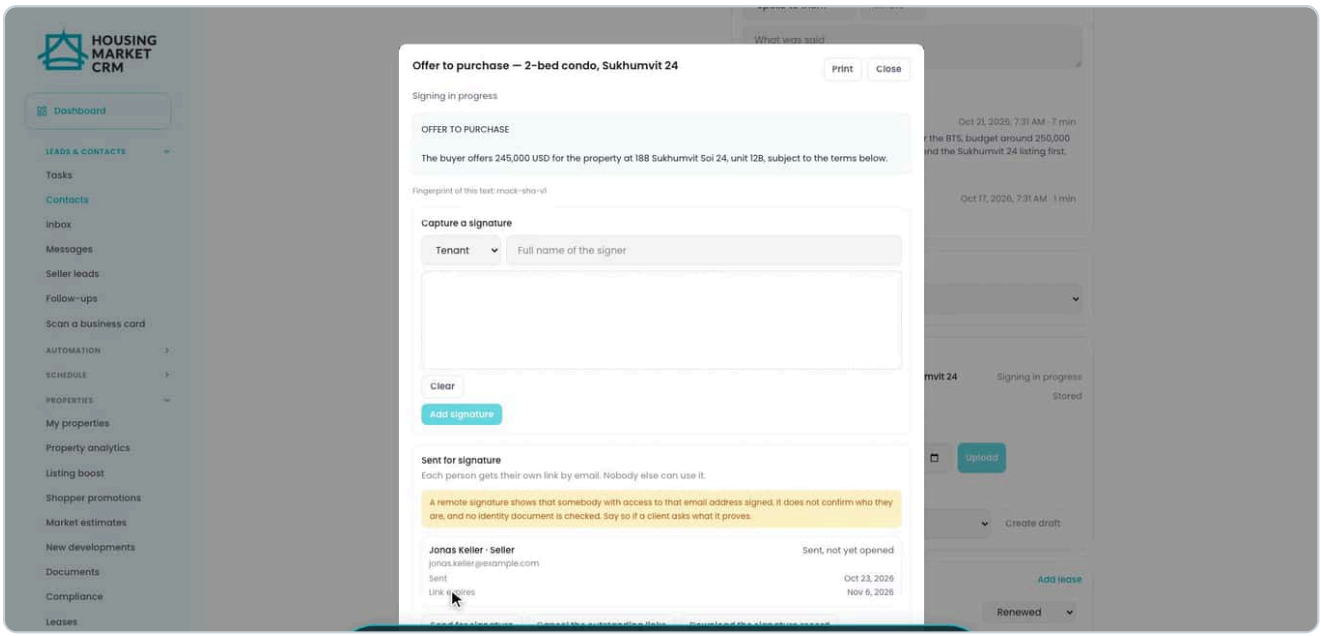


Figure 100.15 · Screen recorded 23 October 2026

16 Changed your mind? **Withdraw** the links that are still unused.

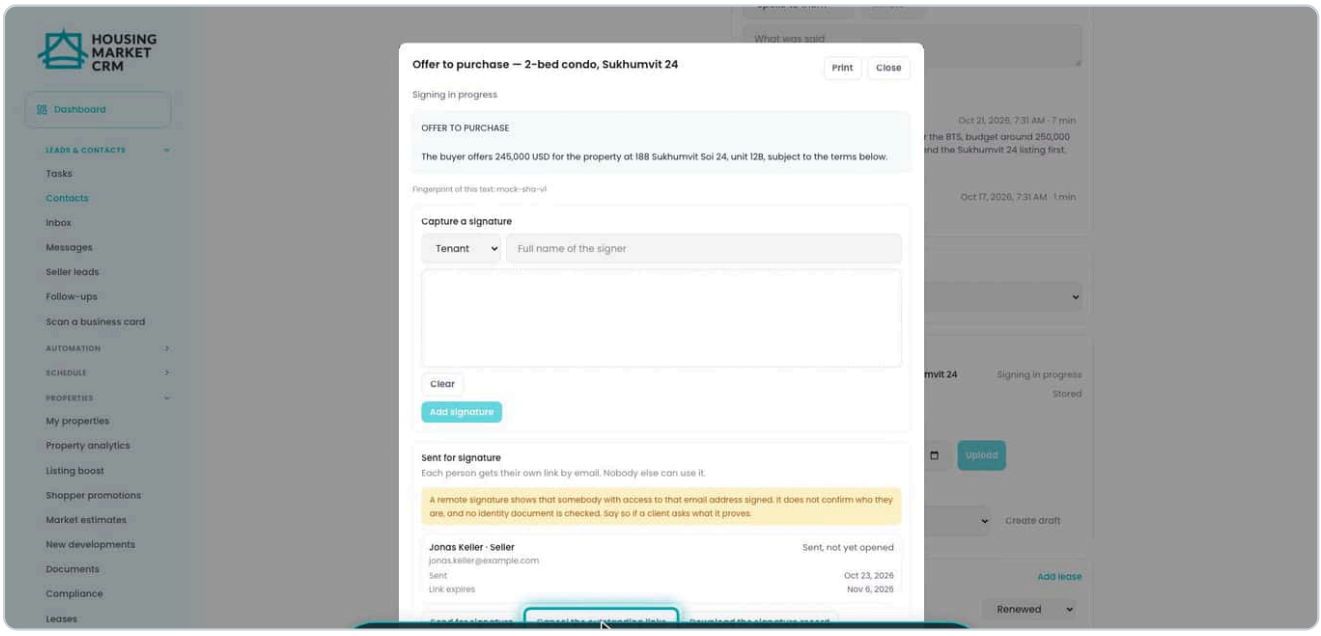


Figure 100.16 · Screen recorded 23 October 2026

17 Close this contract.

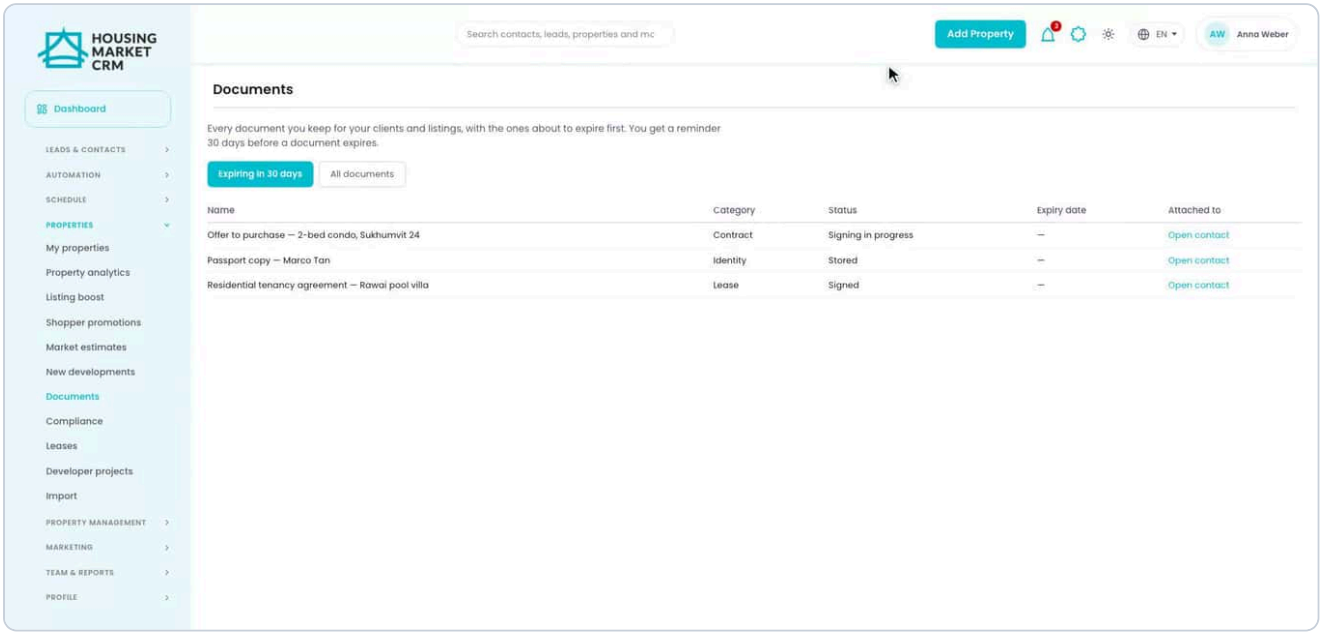


Figure 100.17 · Screen recorded 23 October 2026

18 Open the contact of a contract that is already **signed**.

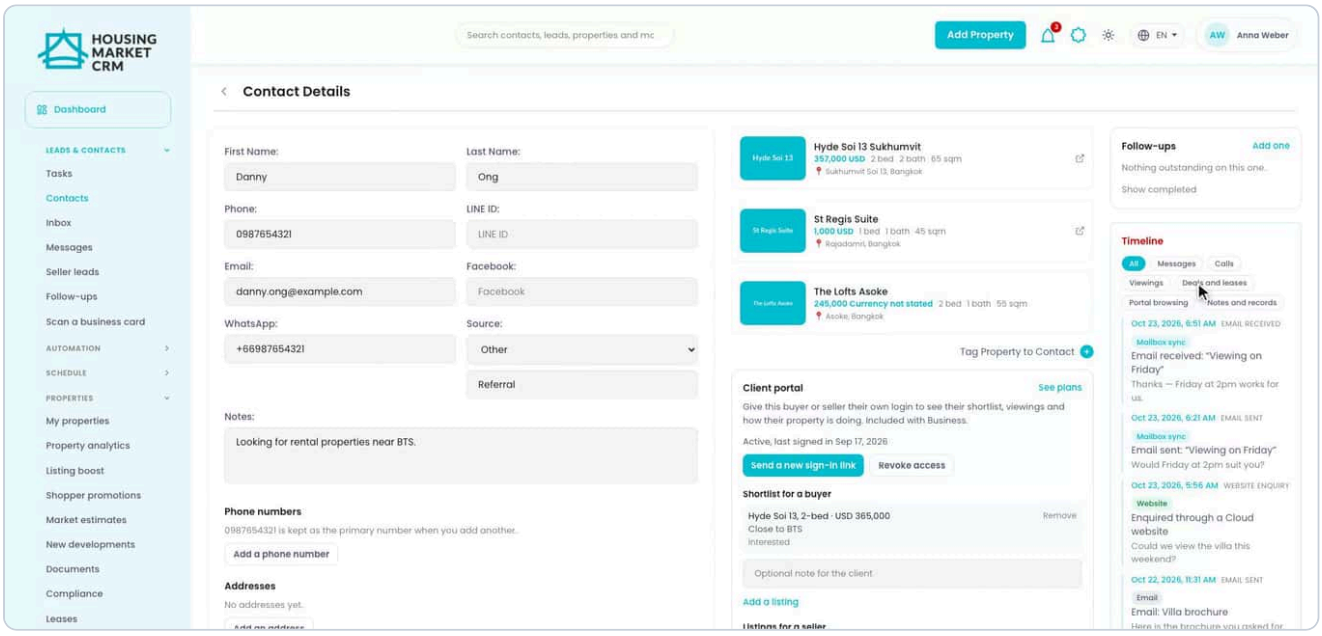


Figure 100.18 · Screen recorded 23 October 2026

19 Open the contract.

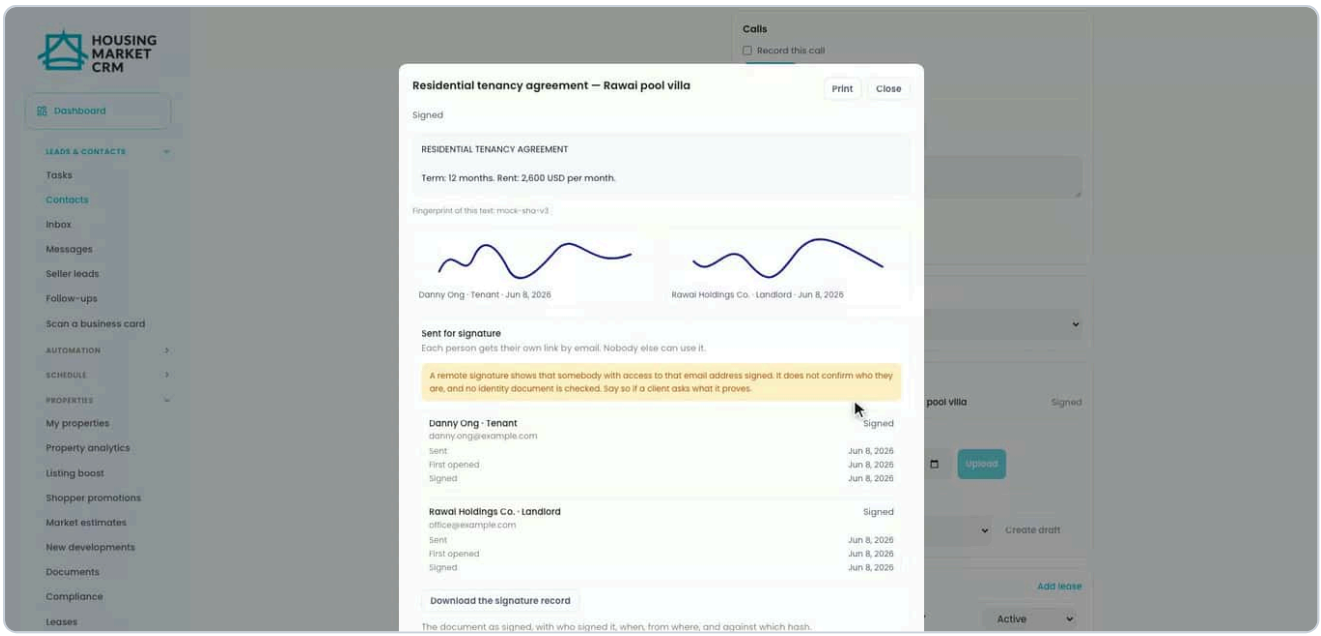


Figure 100.19 · Screen recorded 23 October 2026

20 Each signer shows when they **opened** and **signed**.

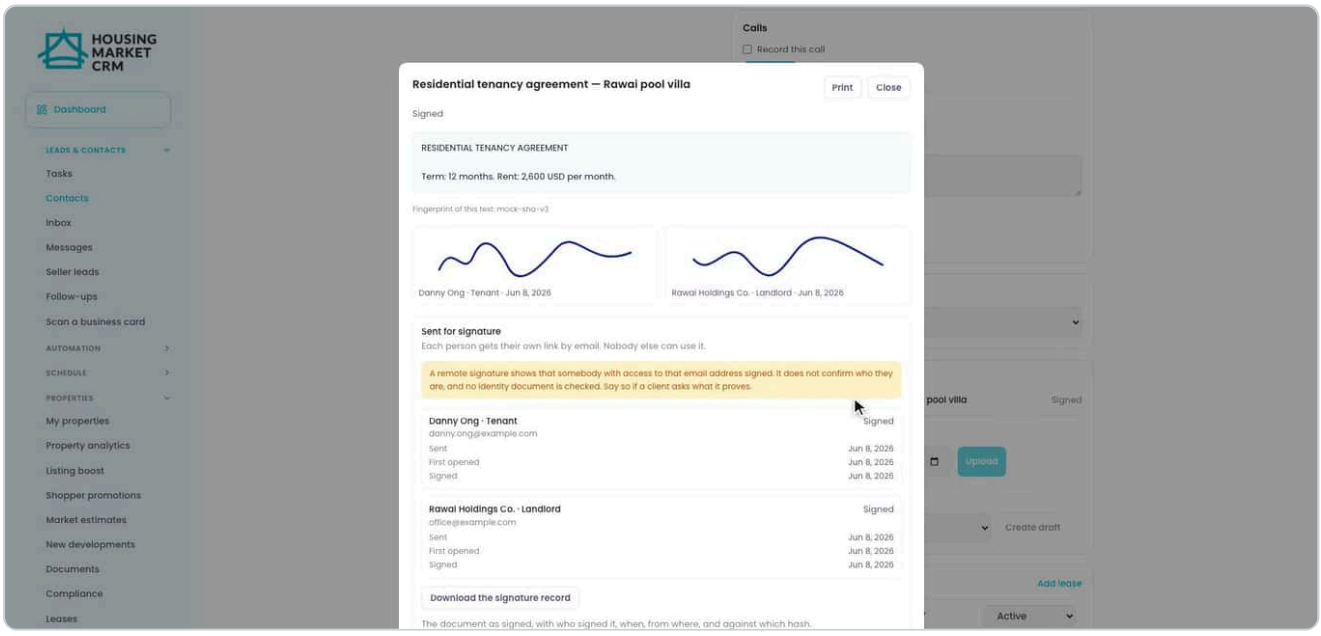


Figure 100.20 · Screen recorded 23 October 2026

21 **Download the signature record** for your files.

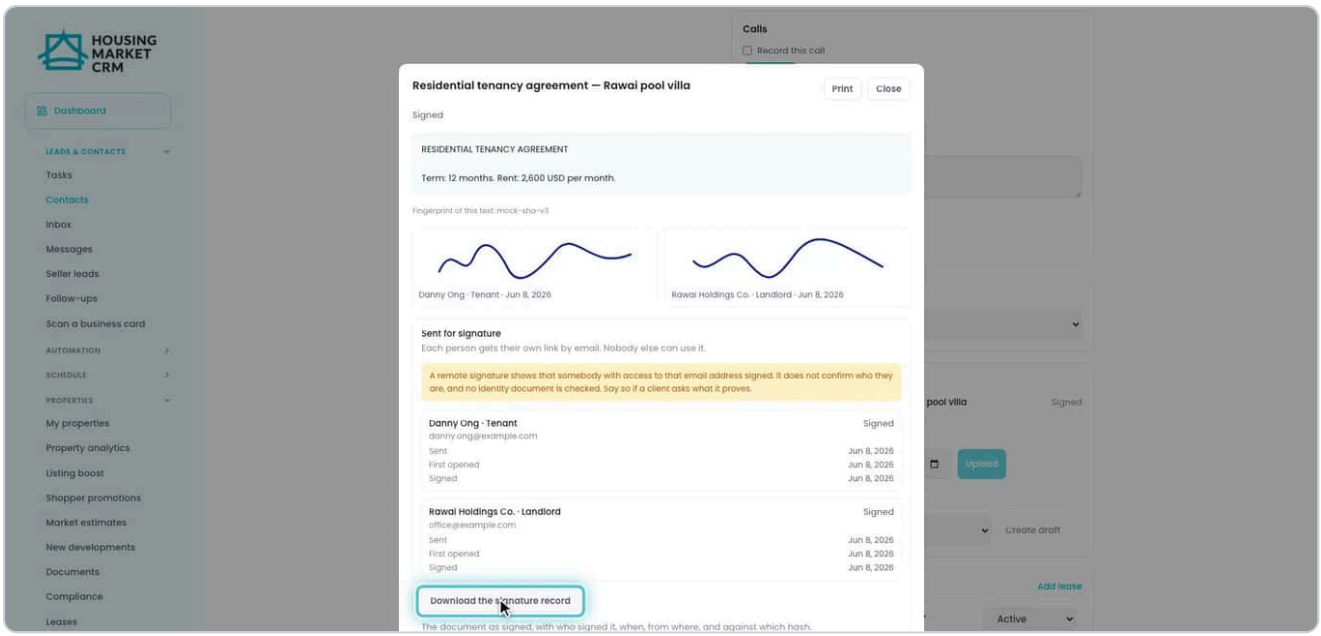


Figure 100.21 · Screen recorded 23 October 2026

22 It lists who signed, when, and against which document hash.

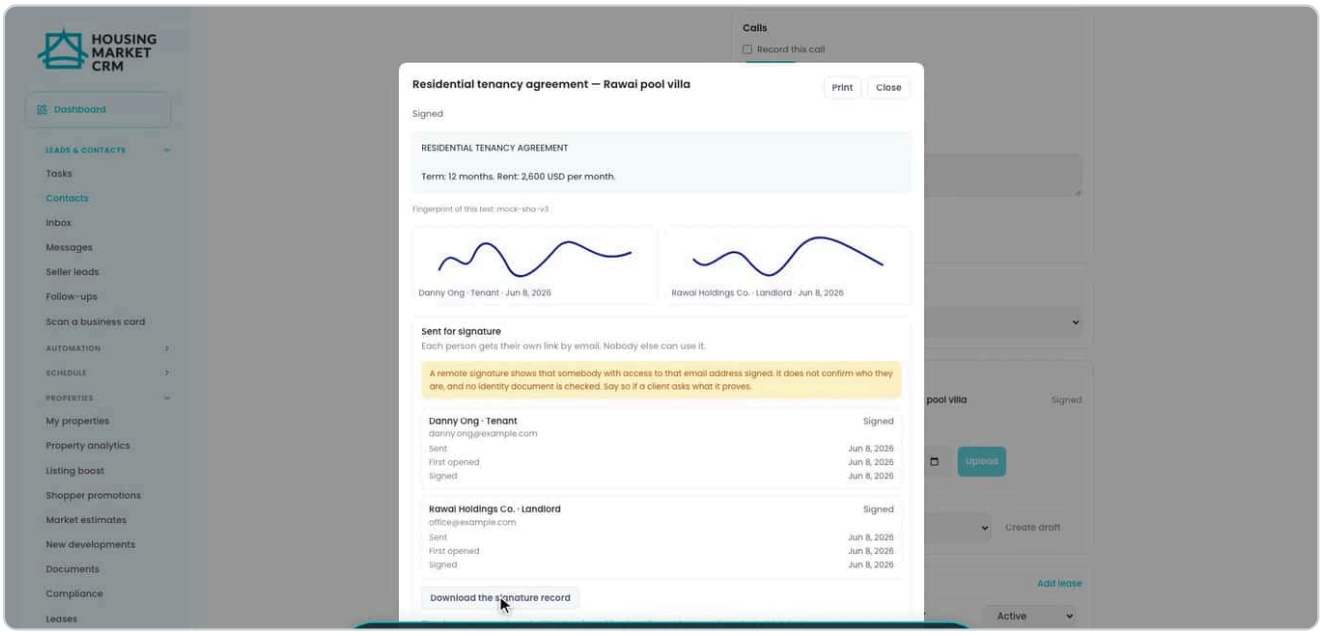


Figure 100.22 · Screen recorded 23 October 2026

RELATED HELP CENTER ARTICLES

How do documents, contracts and leases work?	faq.housingmarketgroup.com/faq/how-do-documents-contracts-and-leases-work

101 CHAPTER 101

Send an uploaded PDF for signature

Pro and Business | For agents | Watch the video

OVERVIEW

Open the PDF in your Documents, choose Send this PDF for signature, add each signer with a name, an email address and a role, and send. Each signer gets a private link; when the last person has signed, the signed copy is emailed to you and to each signer. It is part of Pro.

This works for a PDF you uploaded. A contract made from one of your templates is sent as described in "How do I send a document to be signed remotely?". It is part of Pro.

Sending it

- Open Documents under Properties. A PDF you uploaded is kept with the contact it belongs to: choose Open contact, then open the PDF you want signed.
- In its window, find Send this PDF for signature and read the note: a remote signature shows access to an email address, not who the person is.
- Type the first signer's name and email address and choose their role. Choose Add another signer for each further person.
- Choose Send for signature.

Everyone gets a private link of their own at the same time and can sign in any order. You never see the link itself, so it cannot be forwarded by mistake. A link expires after two weeks.

Following it up

Each signer appears with a status. Opened means they have read the PDF but not signed. Signed shows when they signed. If you change your mind, cancel the links that are still unused: they stop working at once and show Withdrawn.

The signed copy

When the last person has signed, the signed copy is ready. You can download the signed file, and it is also emailed to you and to each signer. If an email went missing, choose Make or re-send the signed copy.

What can be sent

The PDF must be an ordinary one. A PDF larger than 7 MB, with more than 100 pages, protected by a password or already carrying a digital signature cannot be sent this way. Make a plain copy with Print to PDF or Save as PDF and upload that. A document that already has signatures cannot be sent again.

A remote signature records that someone with access to that email address signed. It does not check who they are, and Housing Market Group does not tell you what it means under any country's law: ask your own adviser before you rely on it for something that matters.

From the Help Center: **How do I send an uploaded PDF for signature?**

STEP BY STEP

1 Open **Documents** under Properties in your **Housing Market CRM** account.

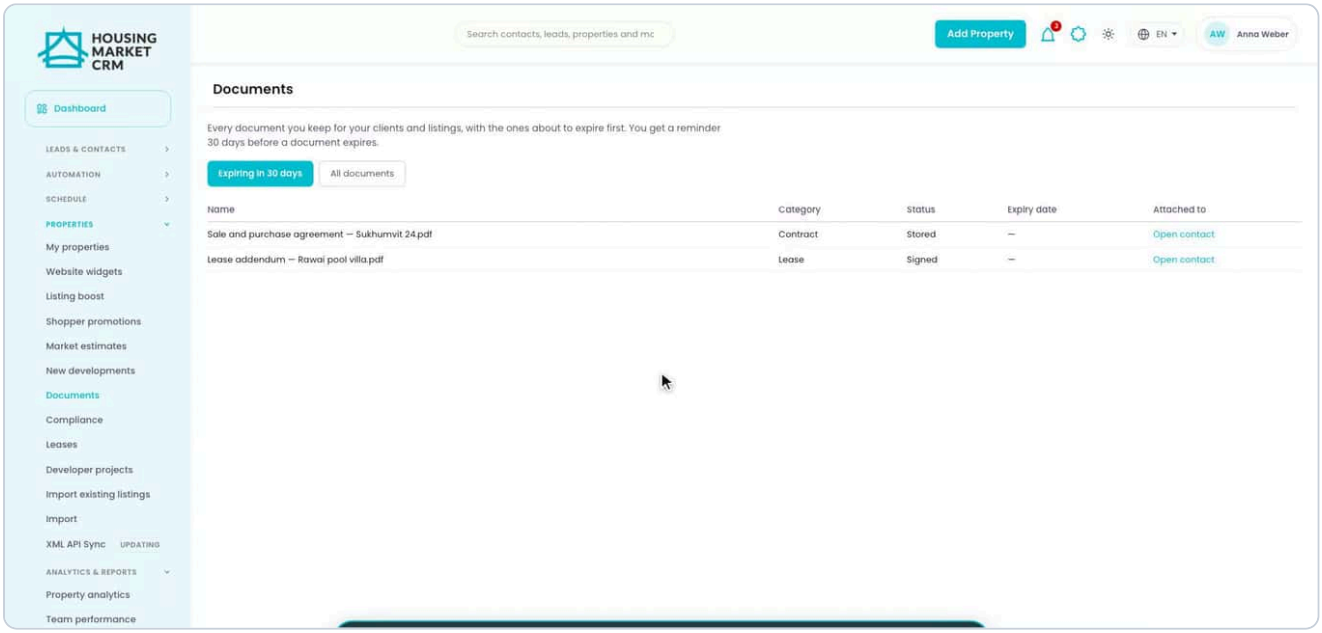


Figure 101.1 · Screen recorded 29 October 2026

2 A PDF you uploaded is kept with the **contact** it belongs to.

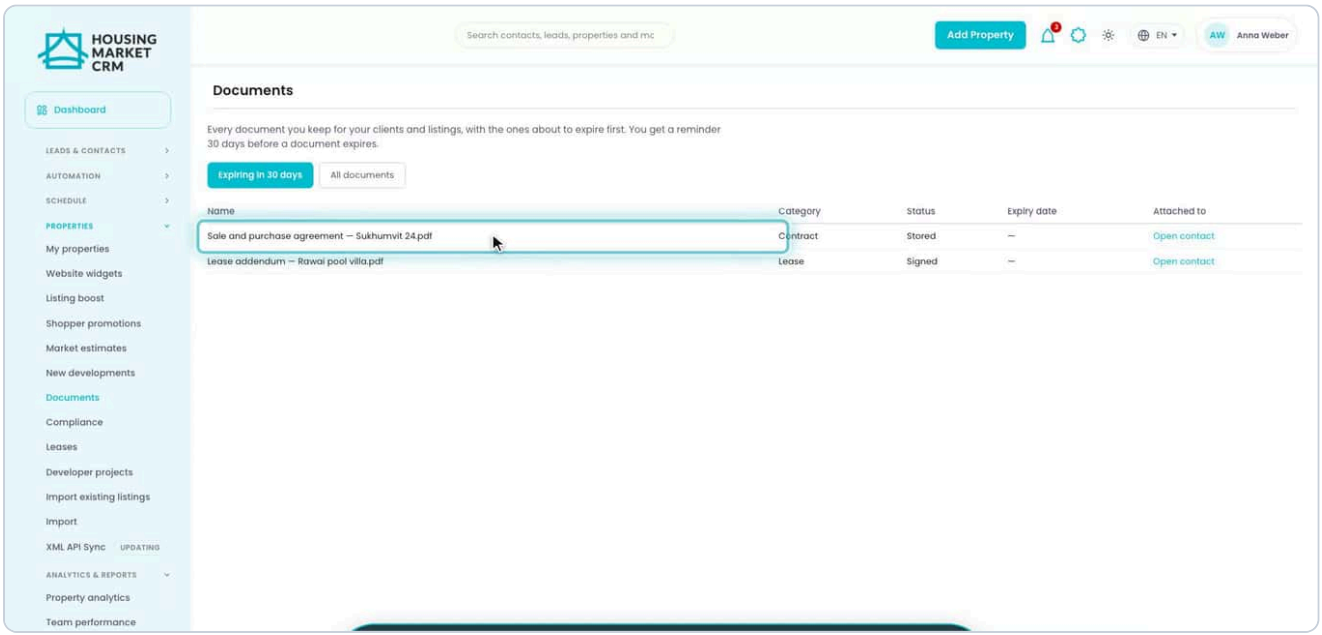


Figure 101.2 · Screen recorded 29 October 2026

3 Click **Open contact**.

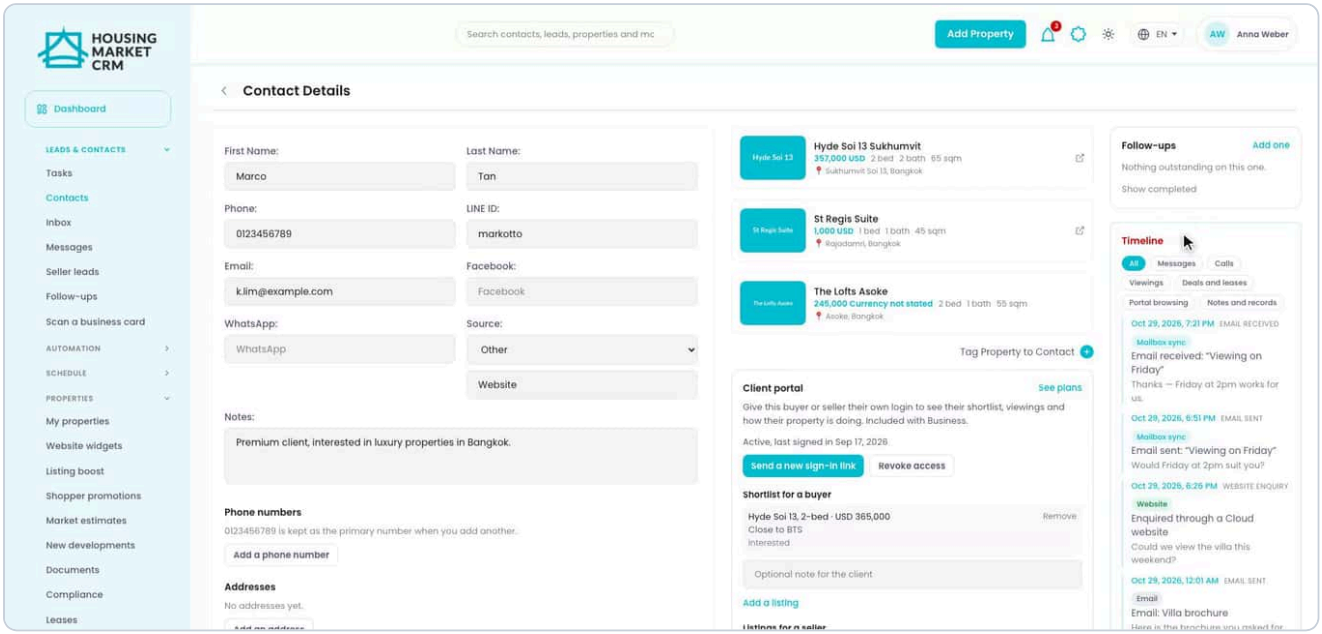


Figure 101.3 · Screen recorded 29 October 2026

4 Open the PDF you want signed.

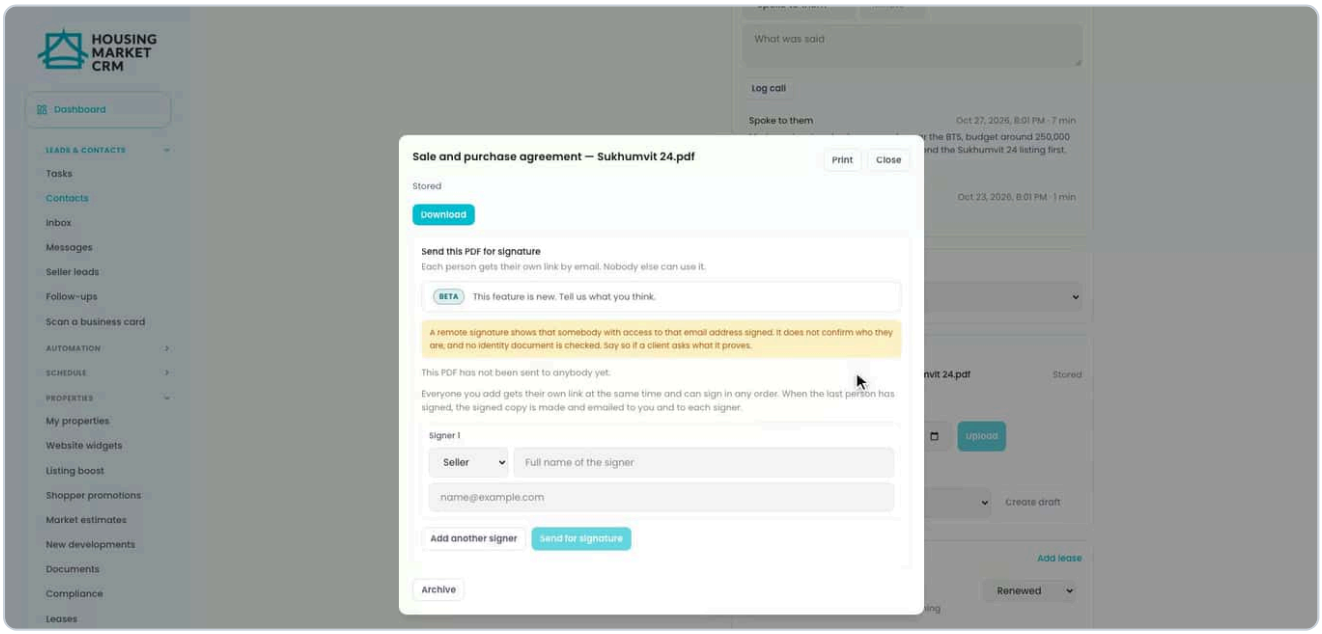


Figure 101.4 · Screen recorded 29 October 2026

5 Its window has **Send this PDF for signature**.

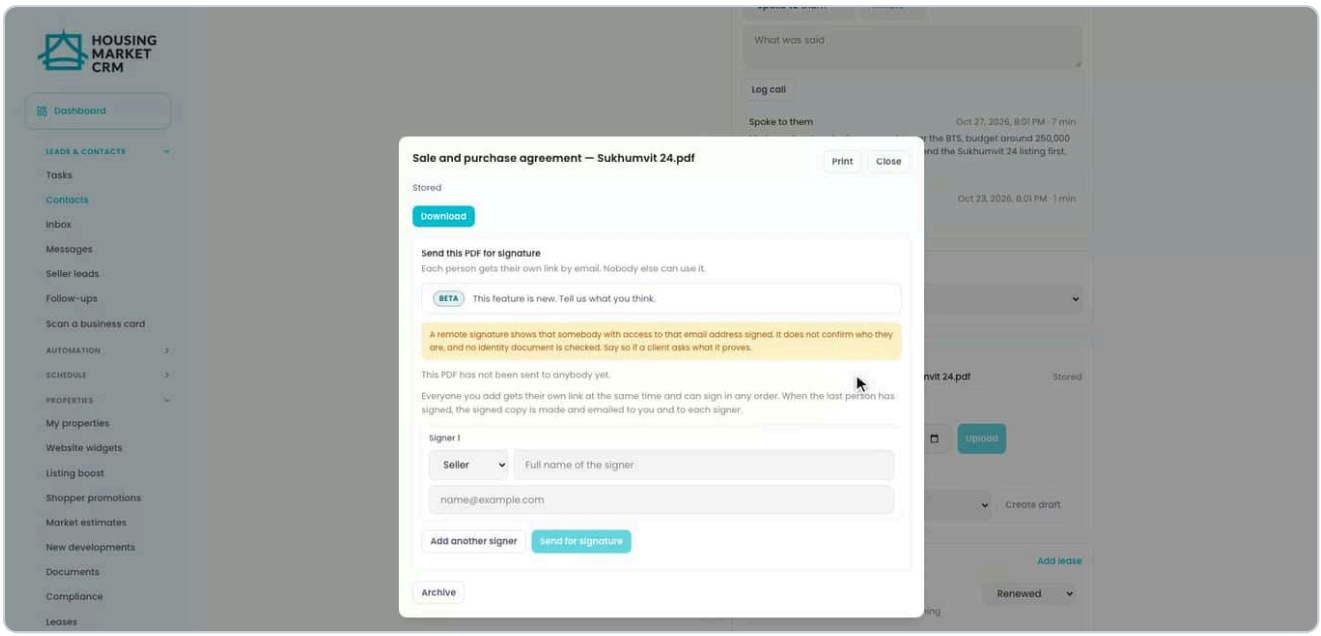


Figure 101.5 · Screen recorded 29 October 2026

6 This feature is new and shows a **Beta** badge while we refine it.

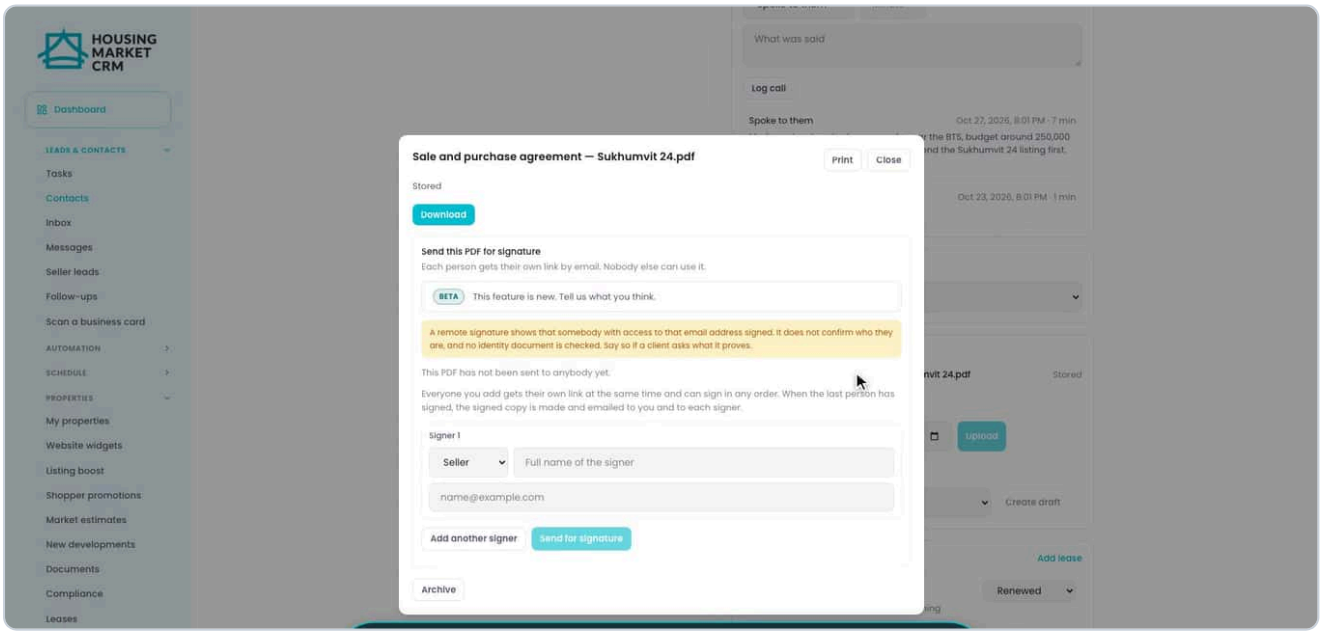


Figure 101.6 · Screen recorded 29 October 2026

7 Read the note: a remote signature shows **access to an email address**, not identity.

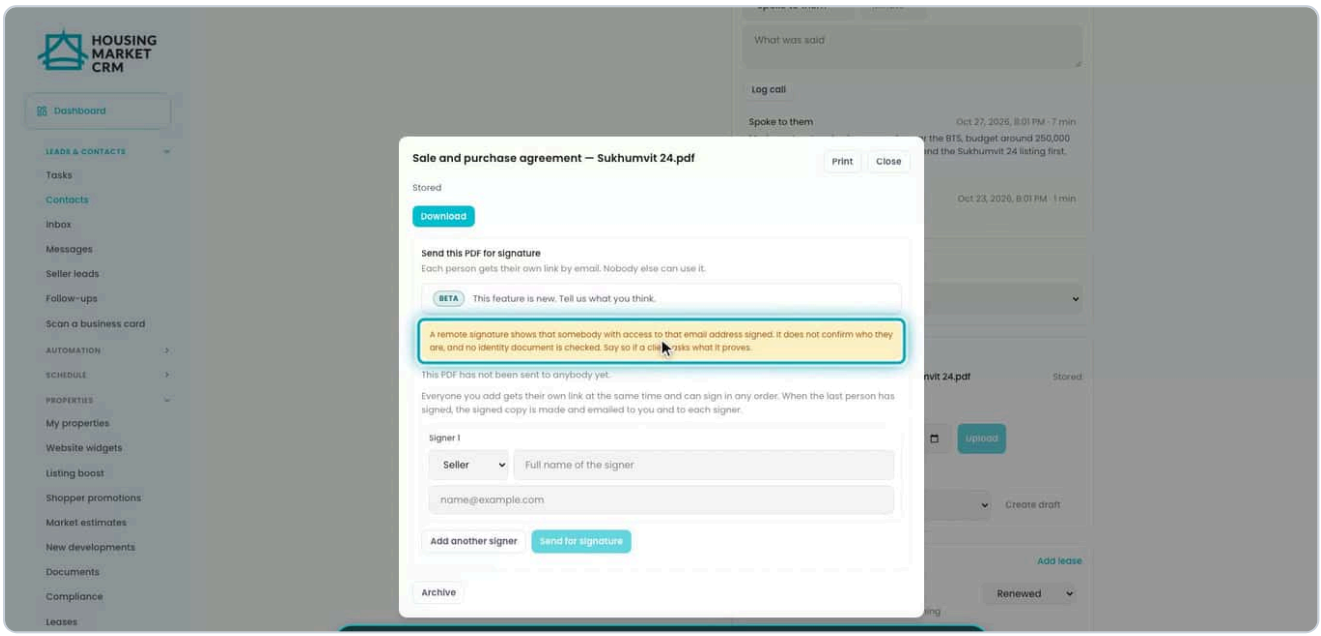


Figure 101.7 · Screen recorded 29 October 2026

8 Choose who the first signer is.

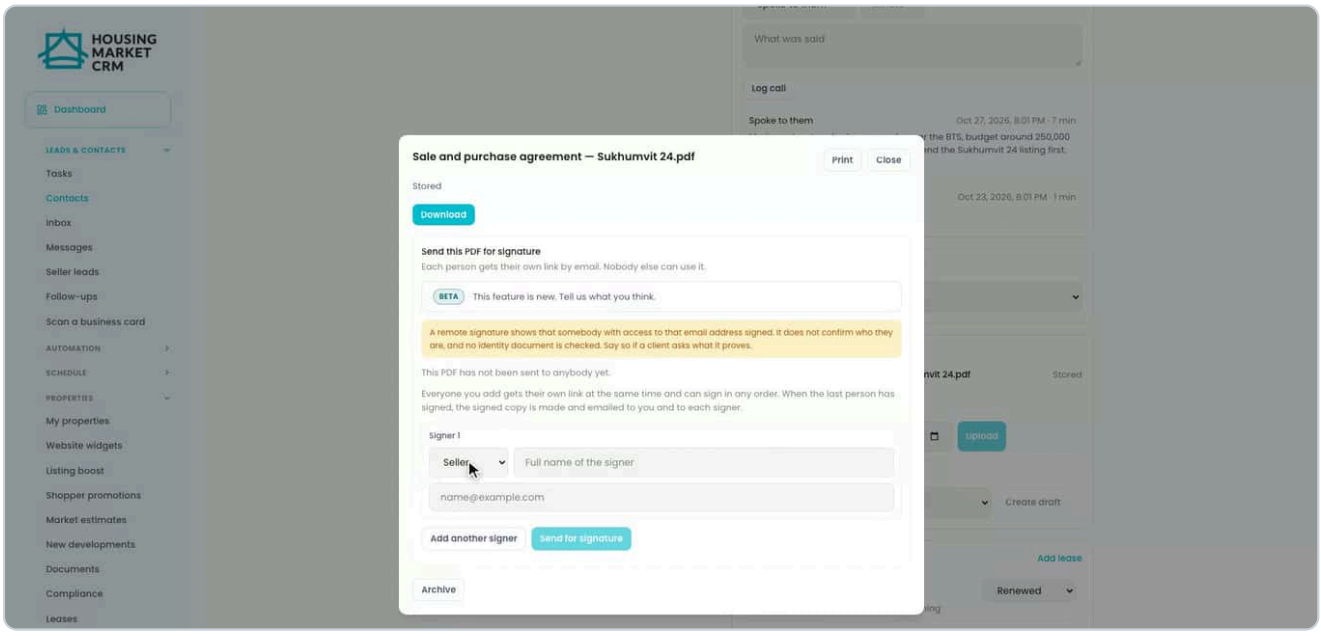


Figure 101.8 · Screen recorded 29 October 2026

9 Type their **name** and **email address**.

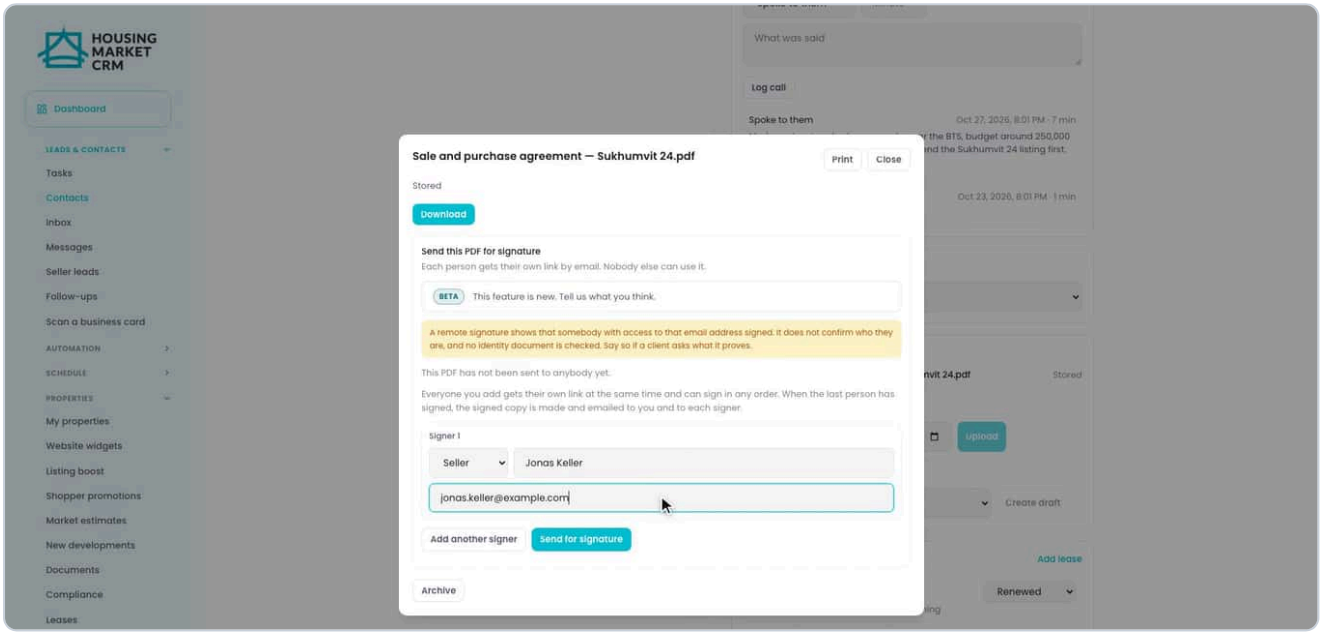


Figure 101.9 · Screen recorded 29 October 2026

10 Click **Add another signer** for each person, with their own role.

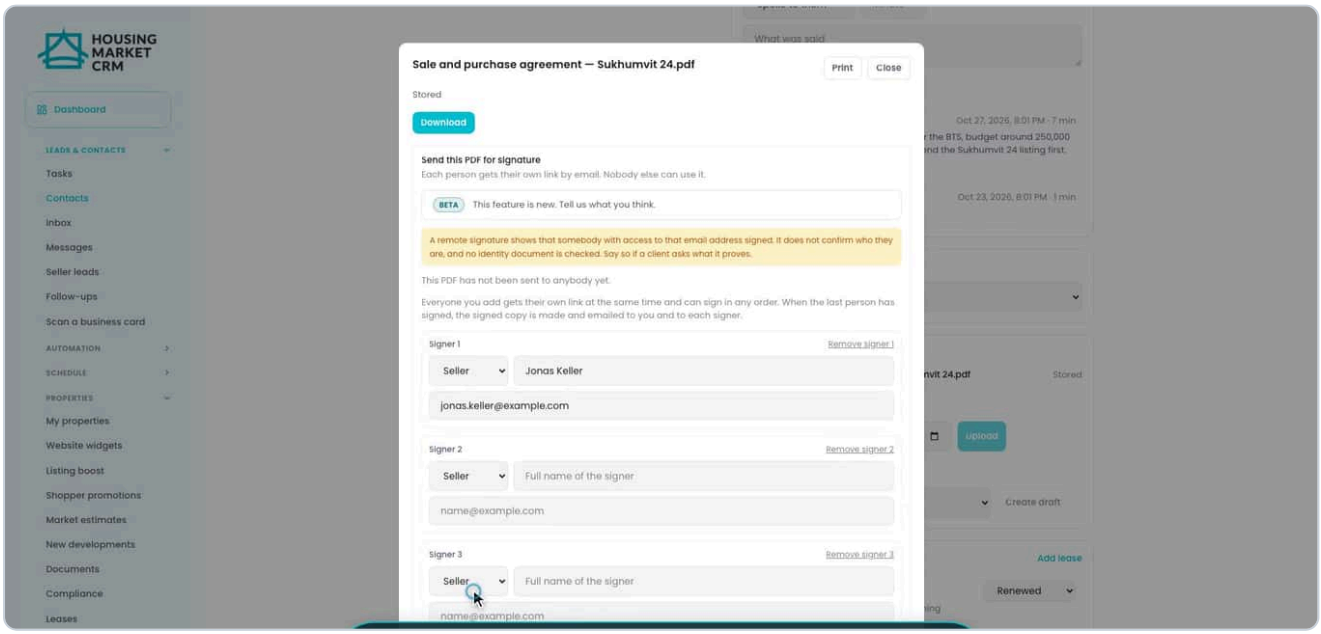


Figure 101.10 · Screen recorded 29 October 2026

11 Everyone gets **their own link** at the same time, and can sign in any order.

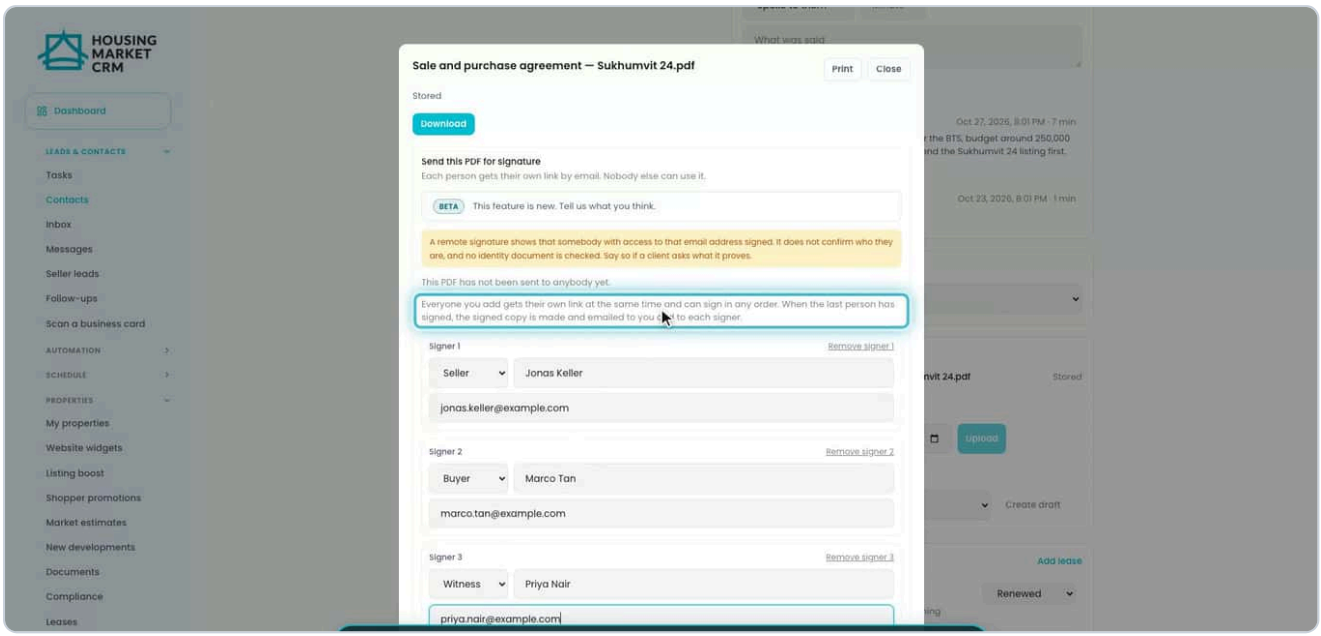


Figure 101.11 · Screen recorded 29 October 2026

12 Click **Send for signature.**

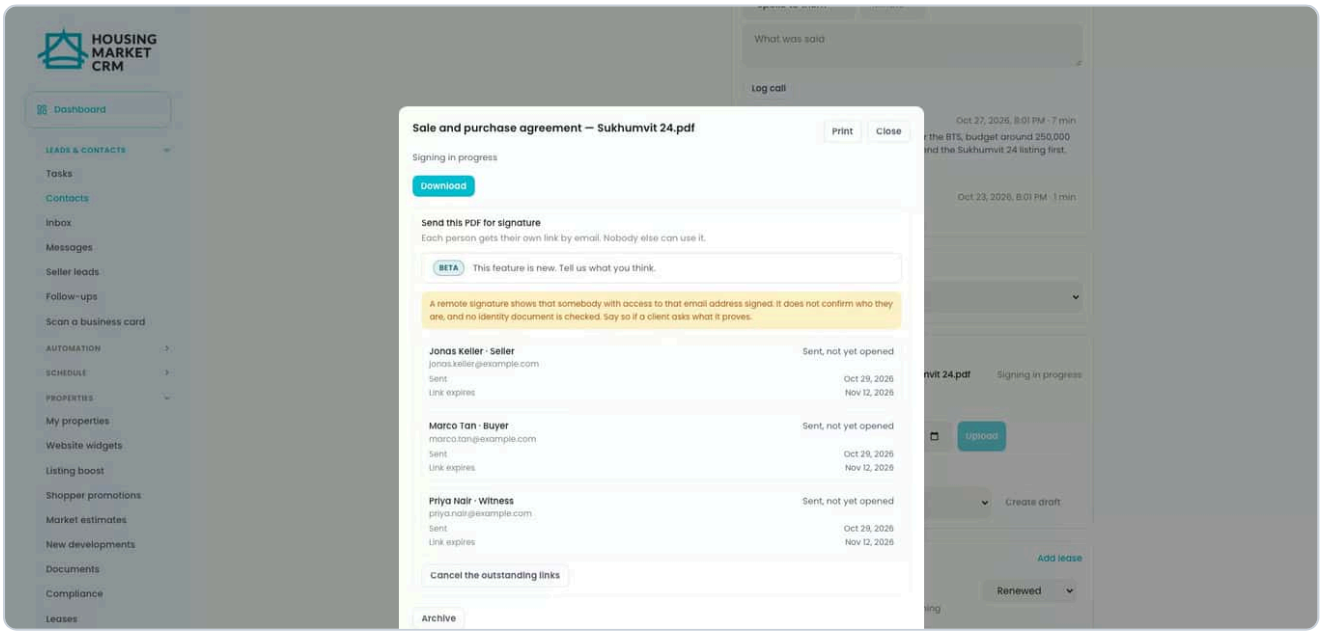


Figure 101.12 · Screen recorded 29 October 2026

13 Each signer appears with their **status**, and their link **expires** after two weeks.

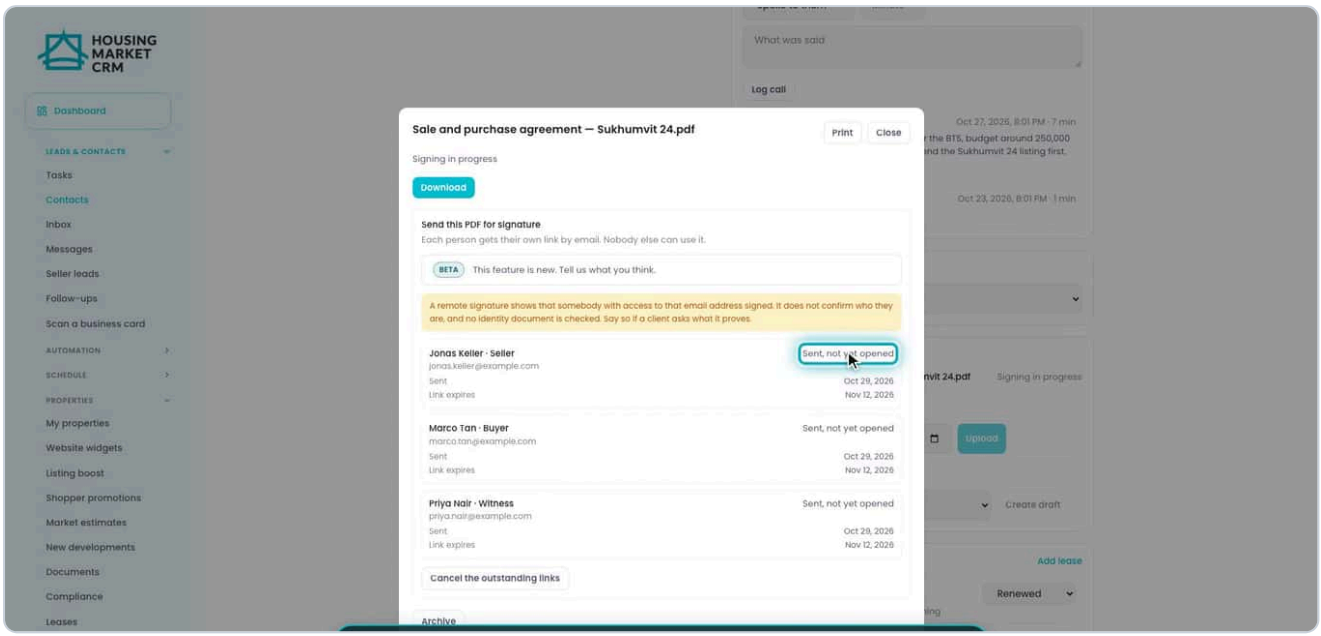


Figure 101.13 · Screen recorded 29 October 2026

14 You never see the link itself, so it cannot be forwarded by mistake.

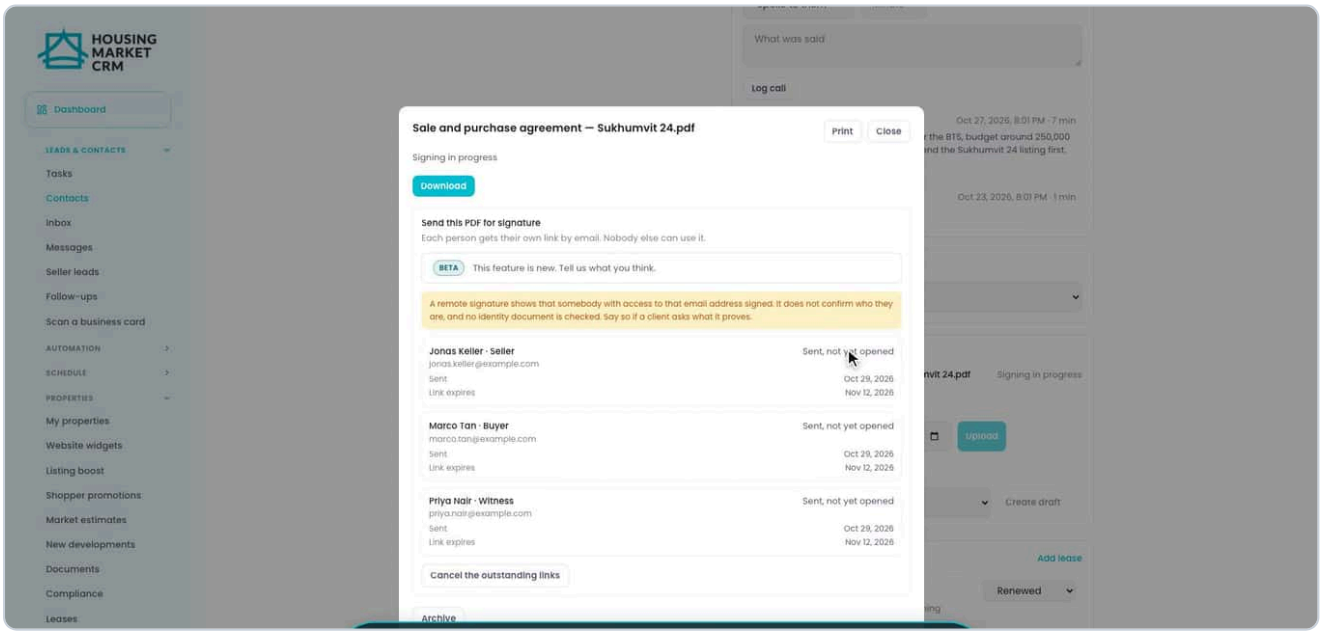


Figure 101.14 · Screen recorded 29 October 2026

15 A few days later, open the PDF again.

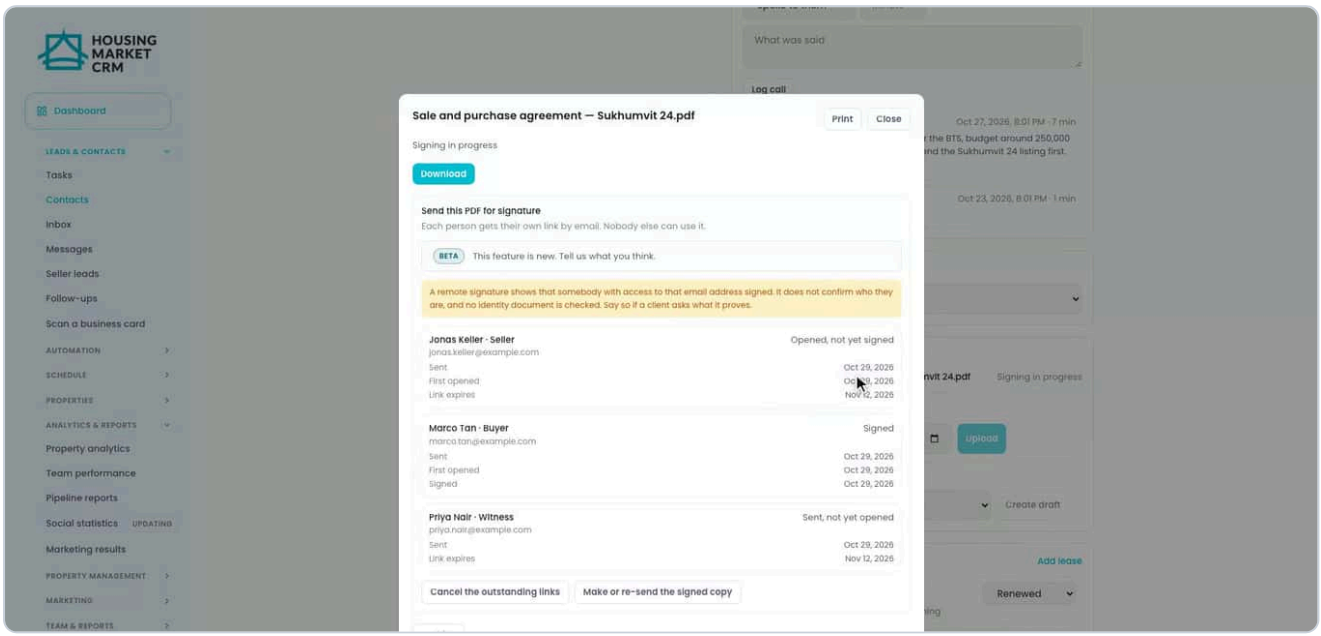


Figure 101.15 · Screen recorded 29 October 2026

16 **Opened** means they have read it but not signed yet.

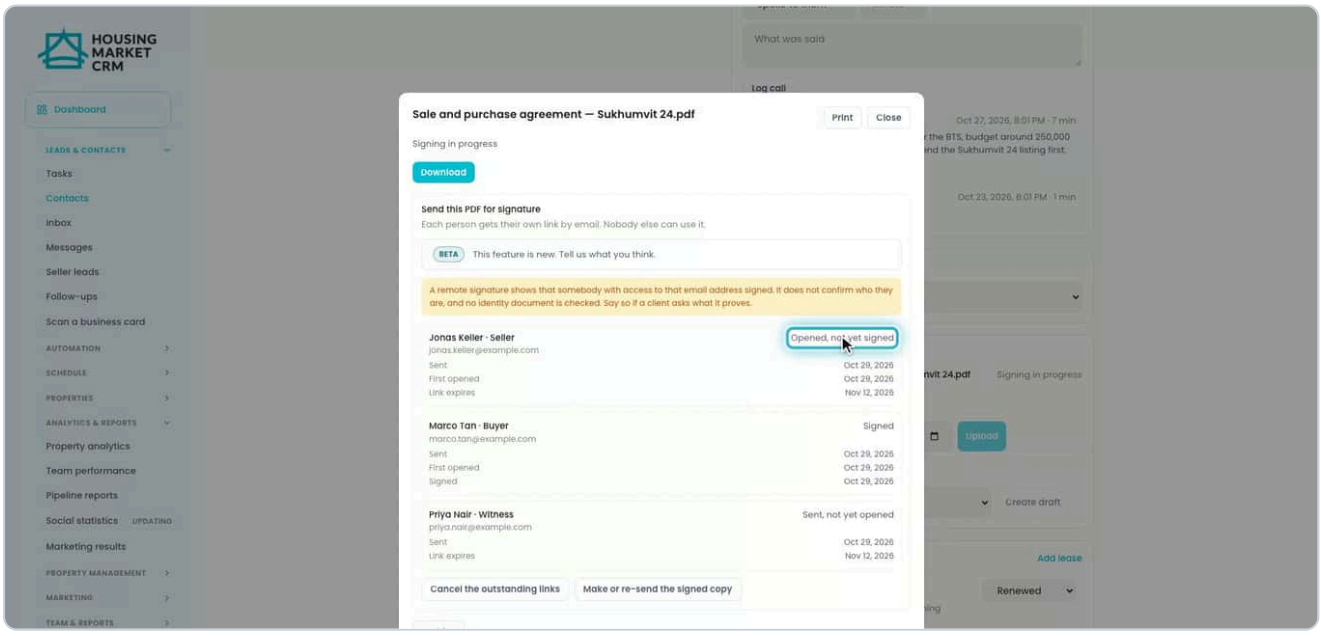


Figure 101.16 · Screen recorded 29 October 2026

17 **Signed** shows when they signed.

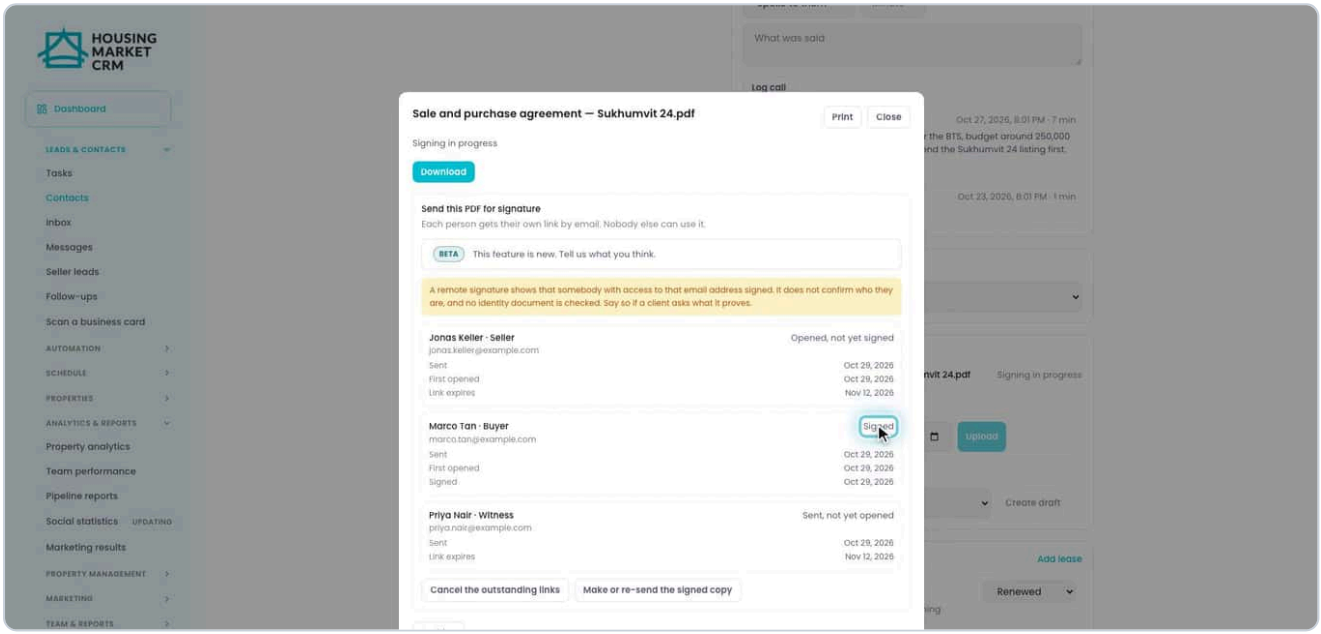


Figure 101.17 · Screen recorded 29 October 2026

18 Changed your mind? **Cancel the outstanding links** that are still unused.

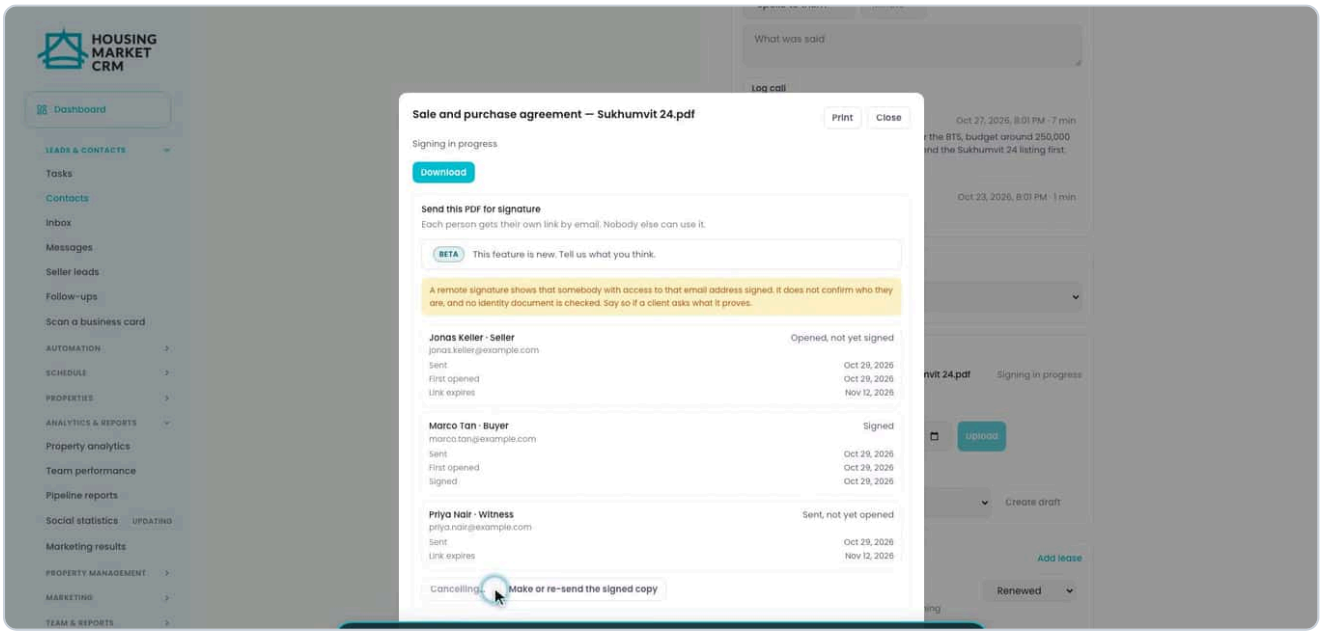


Figure 101.18 · Screen recorded 29 October 2026

19 They stop working at once and show **Withdrawn**.

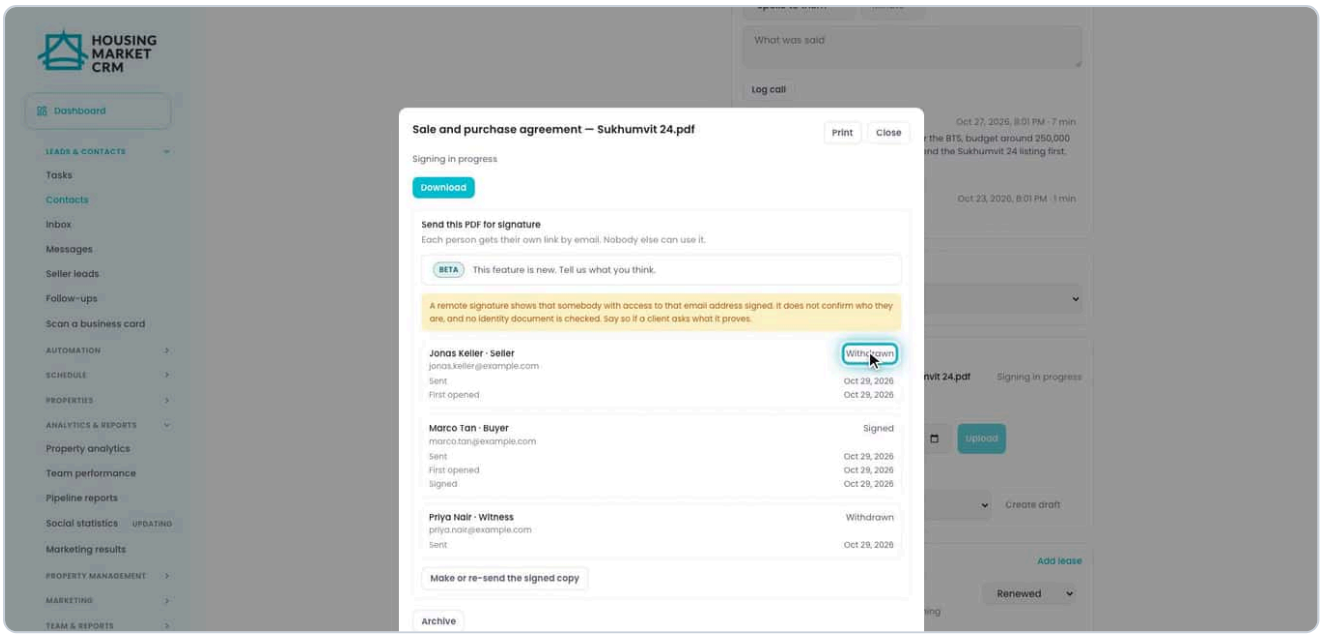


Figure 101.19 · Screen recorded 29 October 2026

20 Now open a PDF that everyone has signed.

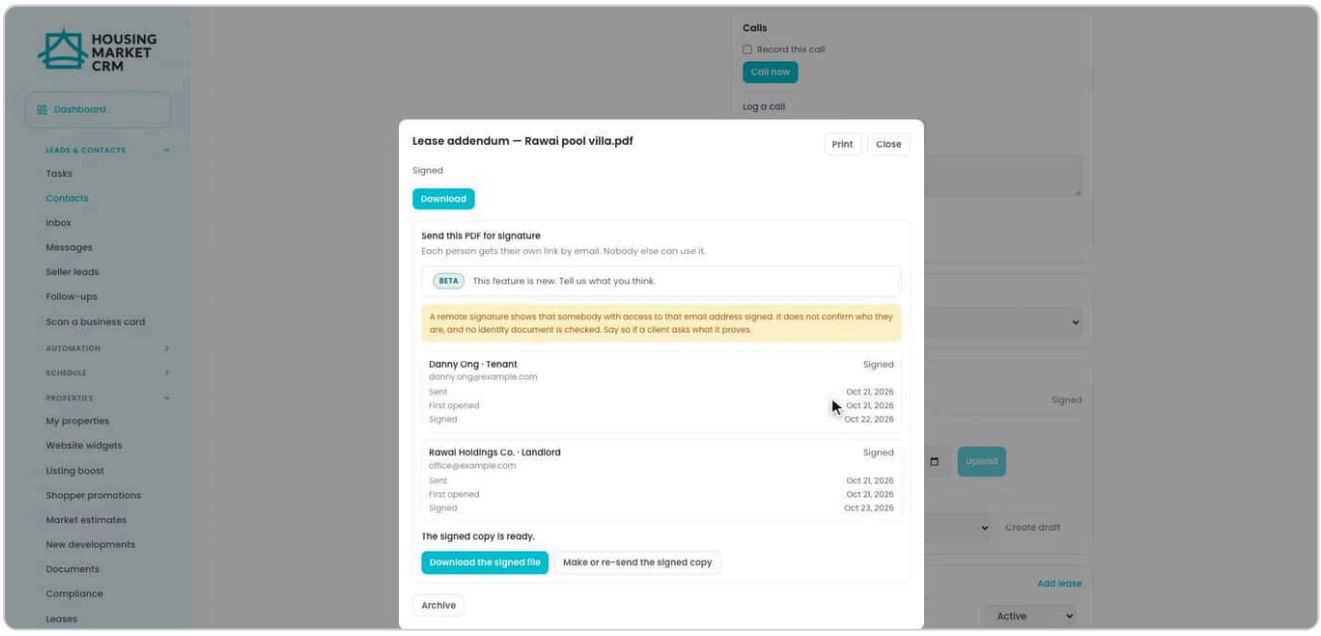


Figure 101.20 · Screen recorded 29 October 2026

21 When the last person has signed, **the signed copy is ready**.

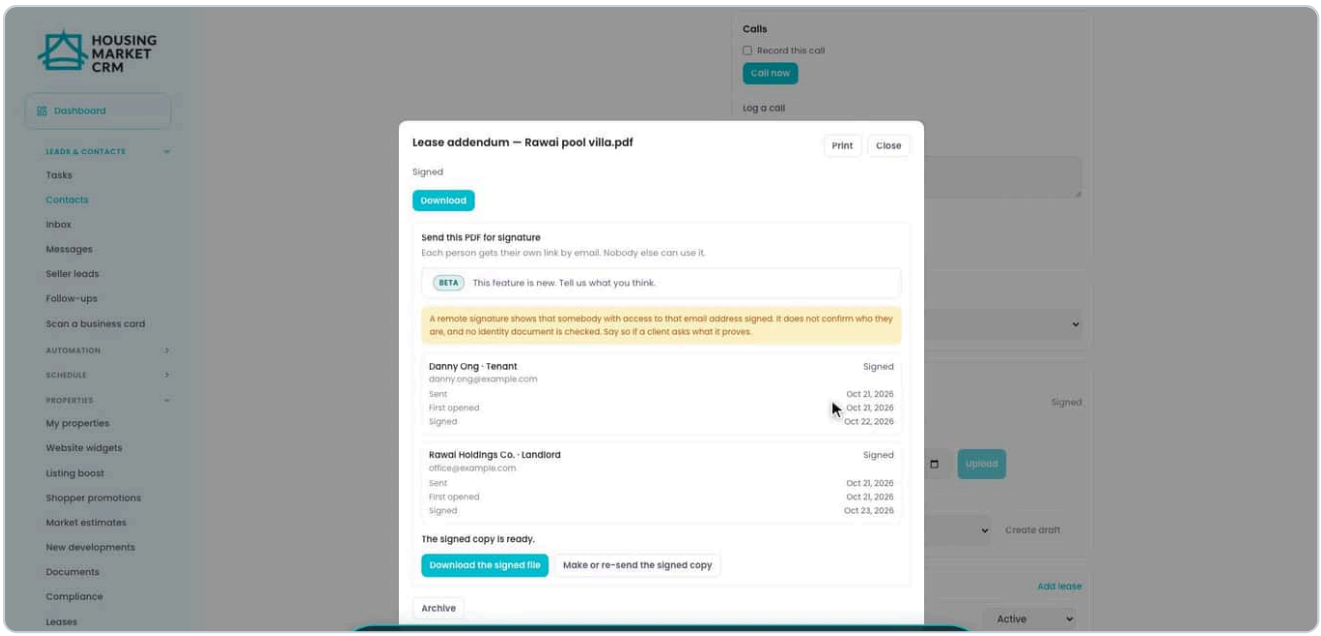


Figure 101.21 · Screen recorded 29 October 2026

22 **Download the signed file** for your records. It is also emailed to you and to each signer.

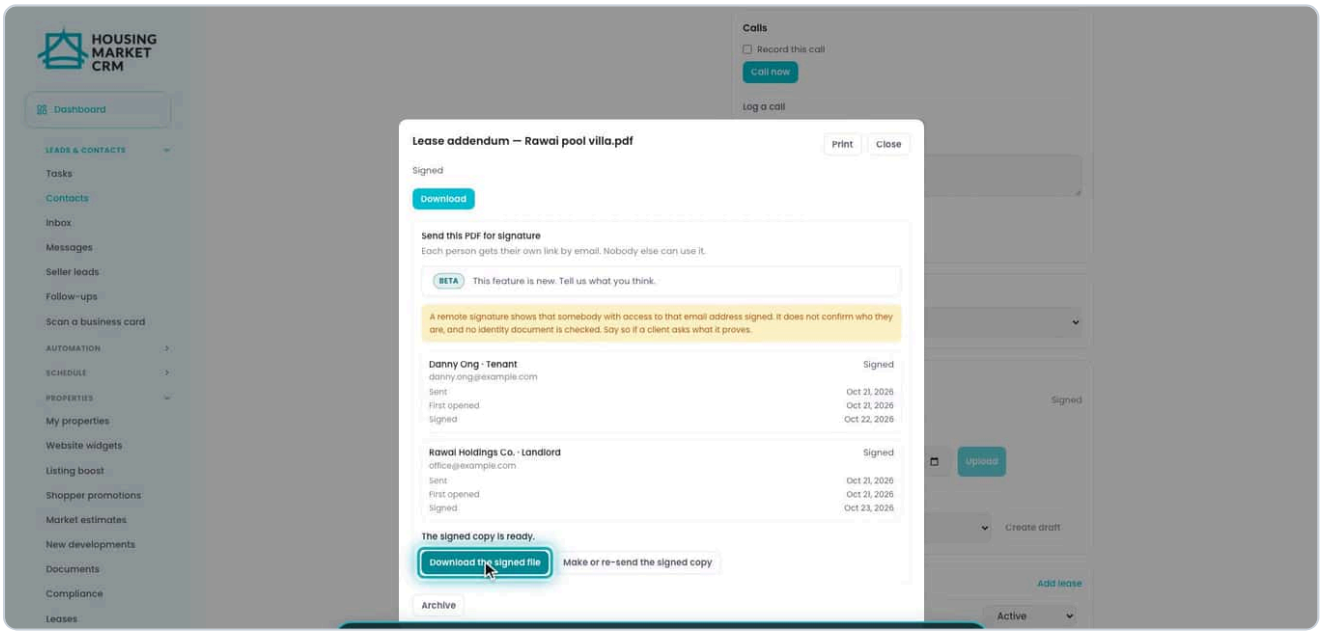


Figure 101.22 · Screen recorded 29 October 2026

23 Did an email go missing? Click **Make or re-send the signed copy**.

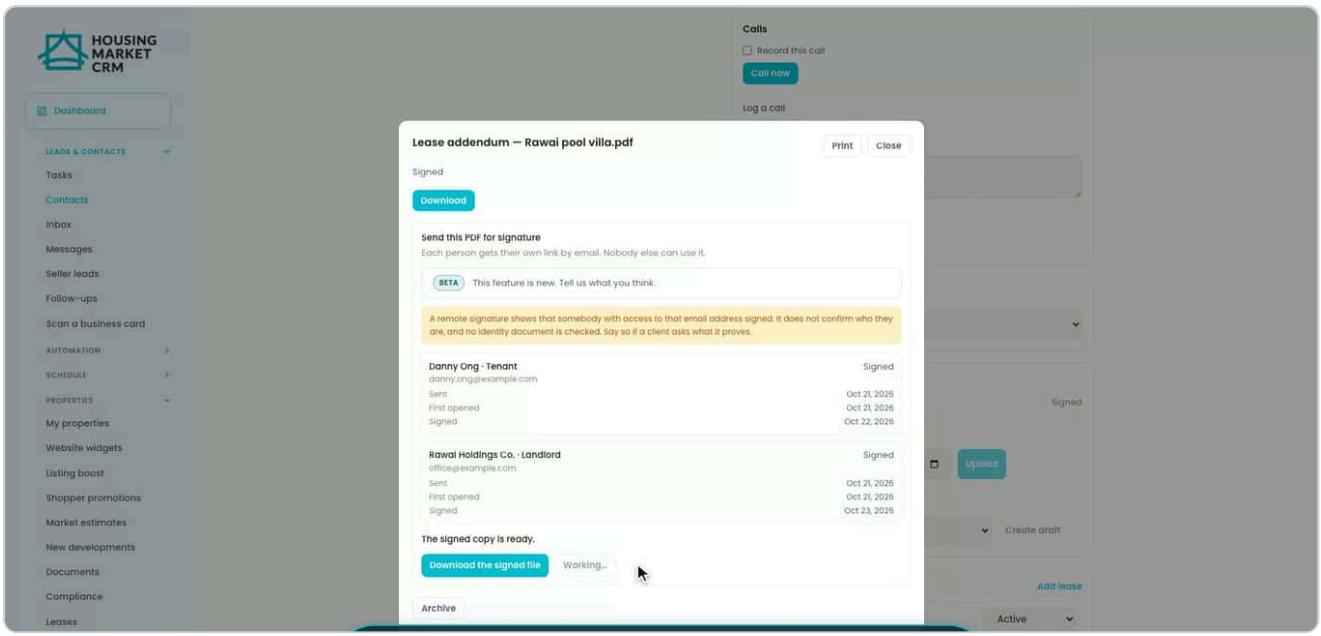


Figure 101.23 · Screen recorded 29 October 2026

24 A note confirms the signed copy **has been emailed**.

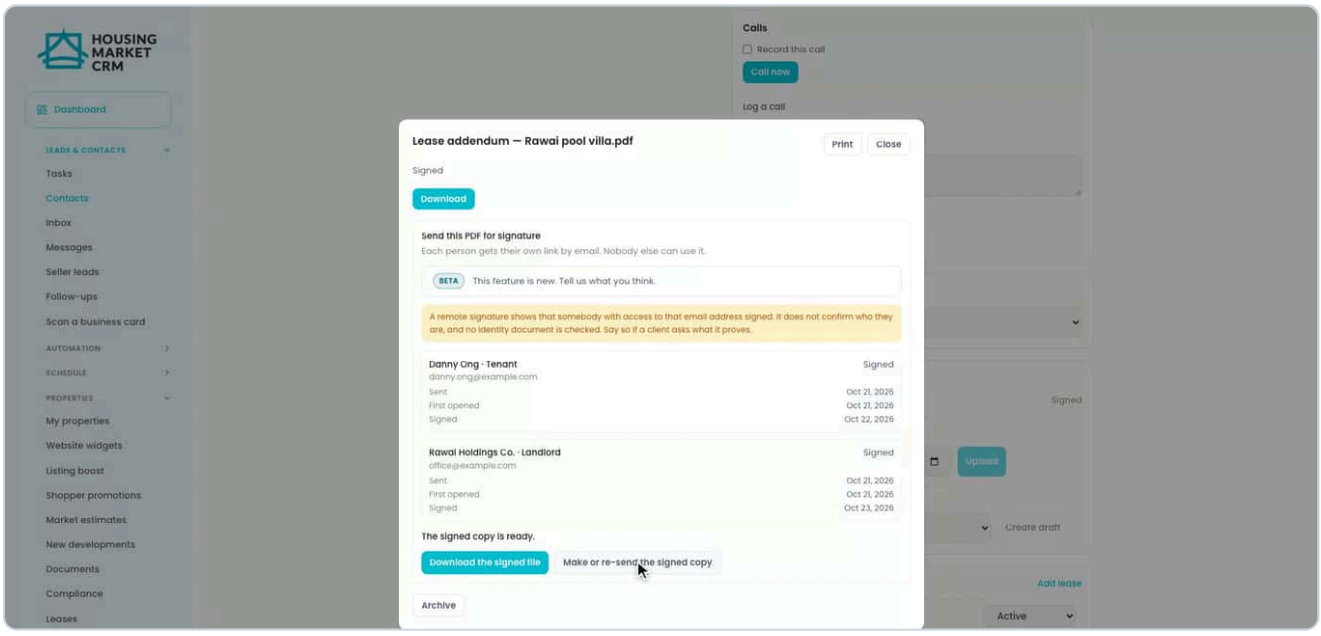


Figure 101.24 · Screen recorded 29 October 2026

RELATED HELP CENTER ARTICLES

How do I send a document to be signed remotely?	faq.housingmarketgroup.com/faq/how-do-i-send-a-document-to-be-signed-remotely
How do documents, contracts and leases work?	faq.housingmarketgroup.com/faq/how-do-documents-contracts-and-leases-work

102 CHAPTER 102

Email yourself a report

Business | For agents | Watch the video

OVERVIEW

On Team performance, choose the period and choose Email me this report. The leaderboard for that period is sent as a CSV file to the email address on your profile, and only to you. It is part of Business.

Team performance is for managing other people, so it and this email are part of Business. Open Team performance in the left menu and choose the period: the last 7, 30 or 90 days.

Choose Email me this report. The same figures you see on the screen are sent as a CSV file to the email address on your profile. You never type a recipient: the report is only ever sent to you.

Open the CSV file in a spreadsheet, keep it, or share it with your team. Before you share it, read how the numbers are worked out in "What do team leaderboards and the weekly owner email show?".

From the Help Center: **How do I email myself the team performance report?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

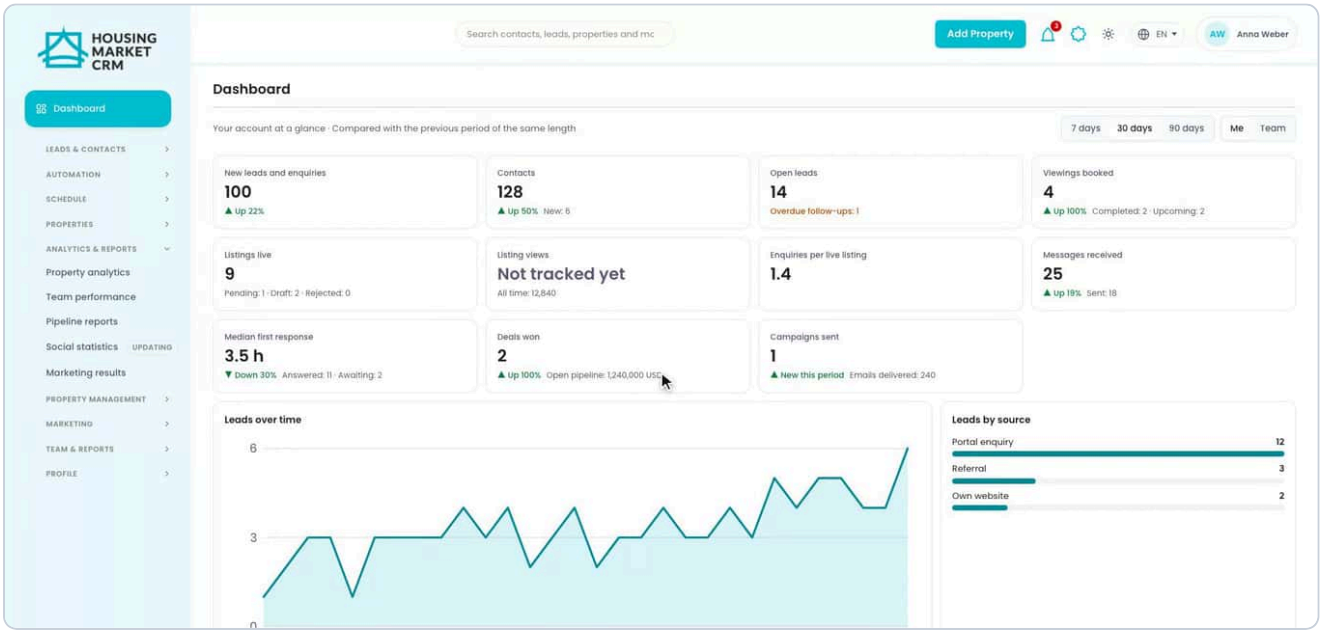


Figure 102.1 · Screen recorded 30 October 2026

2 Click **Team performance**.

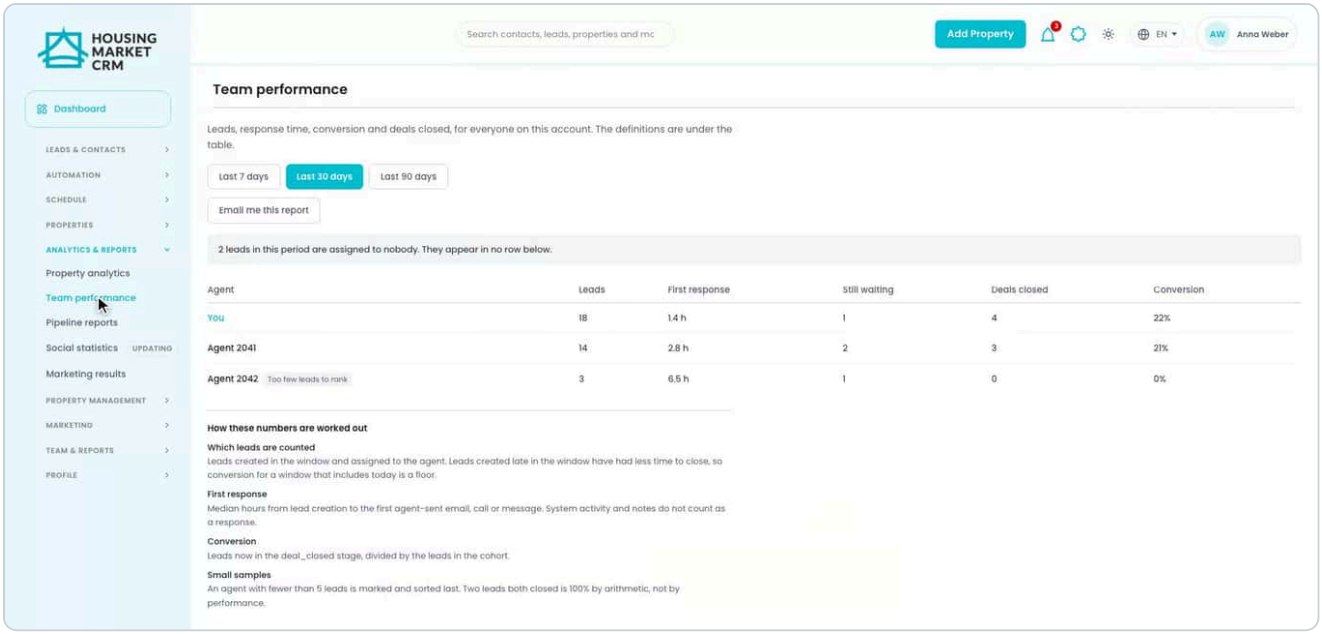


Figure 102.2 · Screen recorded 30 October 2026

3 Choose the **period**: 7, 30 or 90 days.

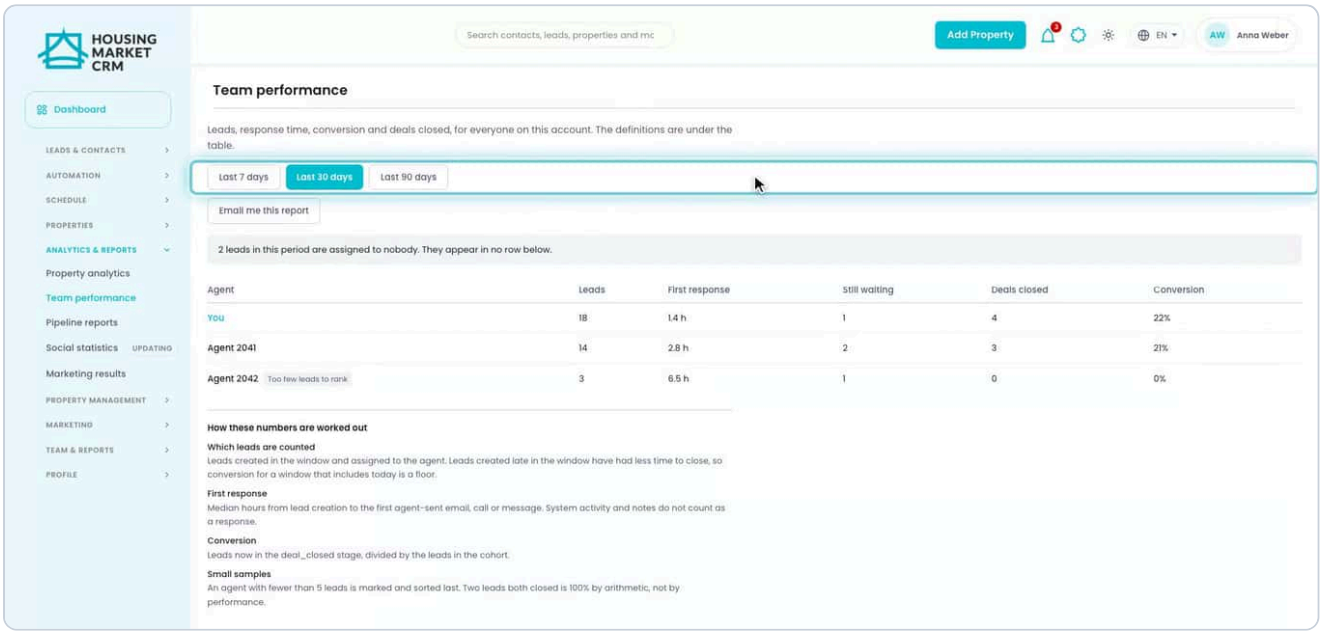


Figure 102.3 · Screen recorded 30 October 2026

4 Use the **last 90 days**.

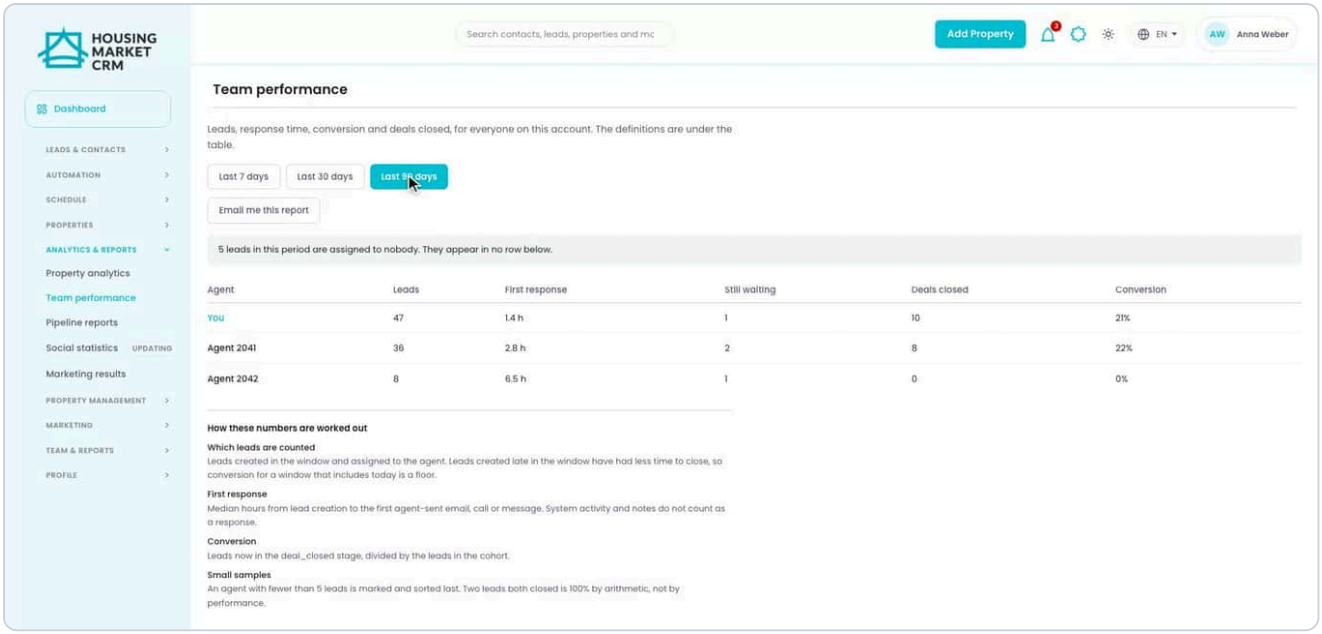


Figure 102.4 · Screen recorded 30 October 2026

5 The same figures can be **emailed to you**.

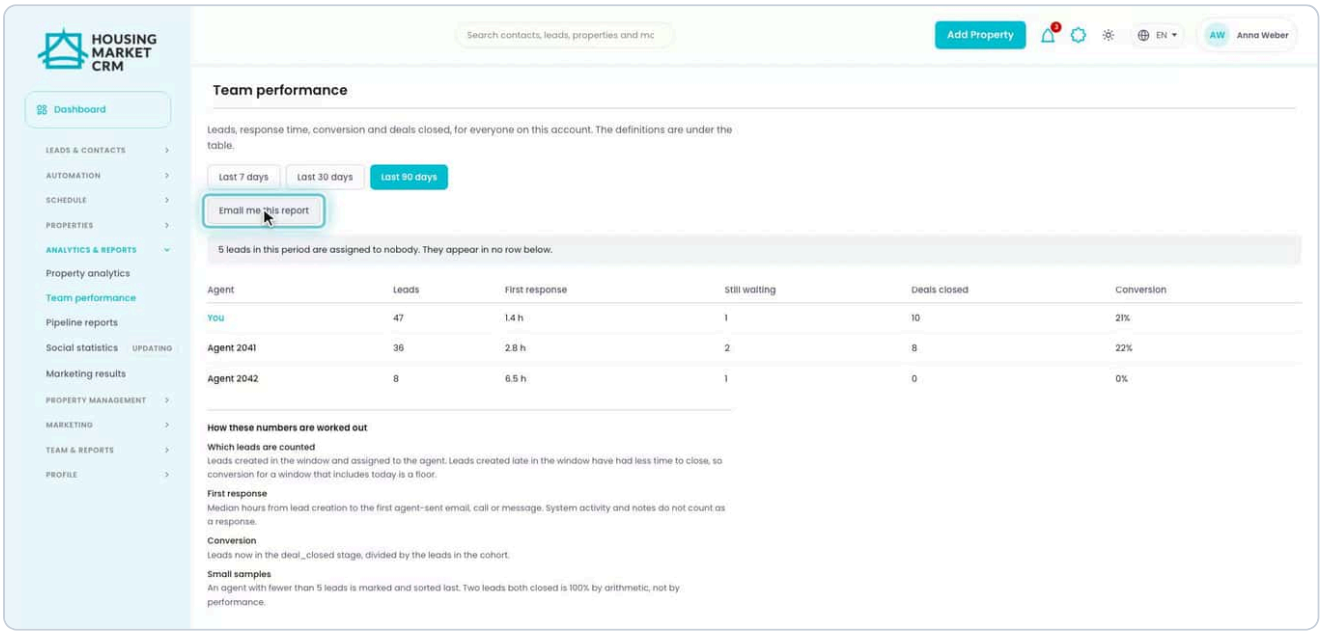


Figure 102.5 · Screen recorded 30 October 2026

6 Click **Email me this report**.

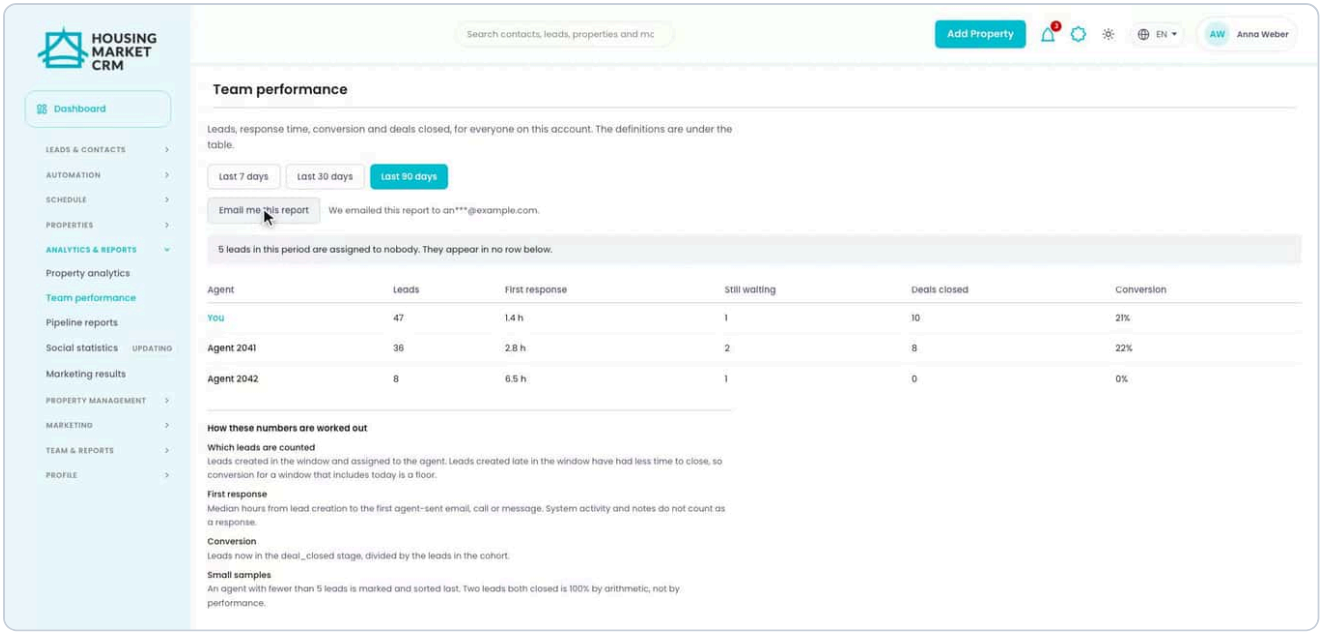


Figure 102.6 · Screen recorded 30 October 2026

7 It goes to the **email address on your profile**.

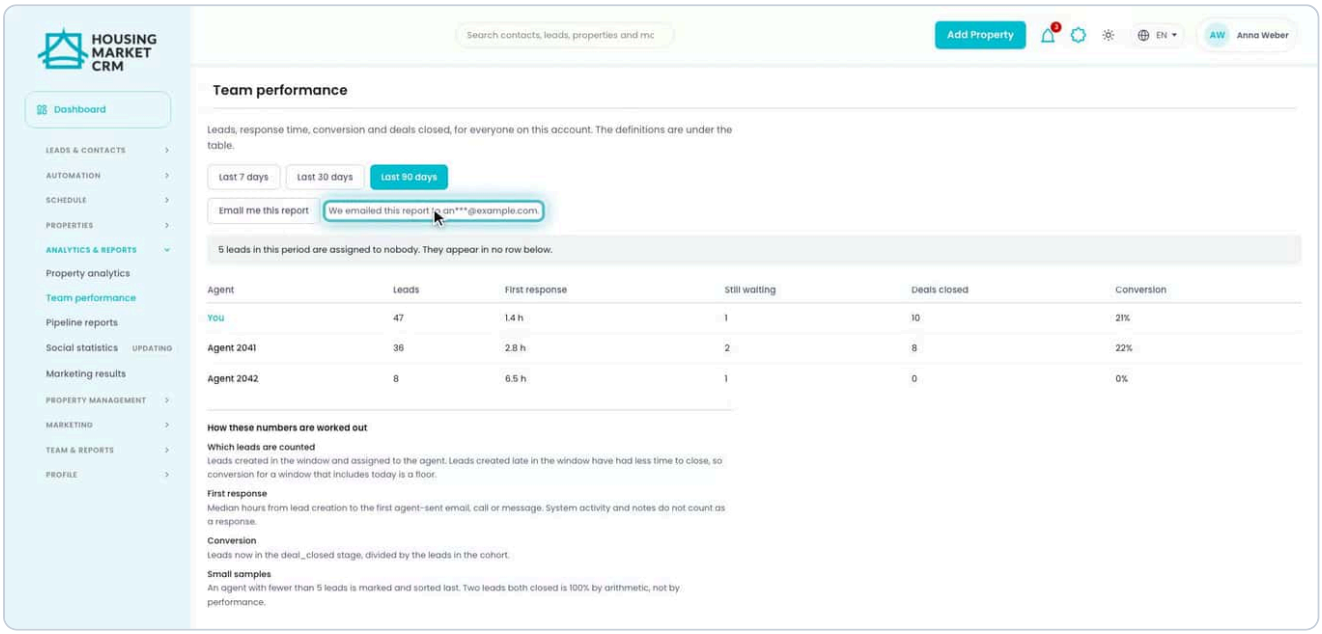


Figure 102.7 · Screen recorded 30 October 2026

8 You never type a recipient: the report is only ever **sent to you**.

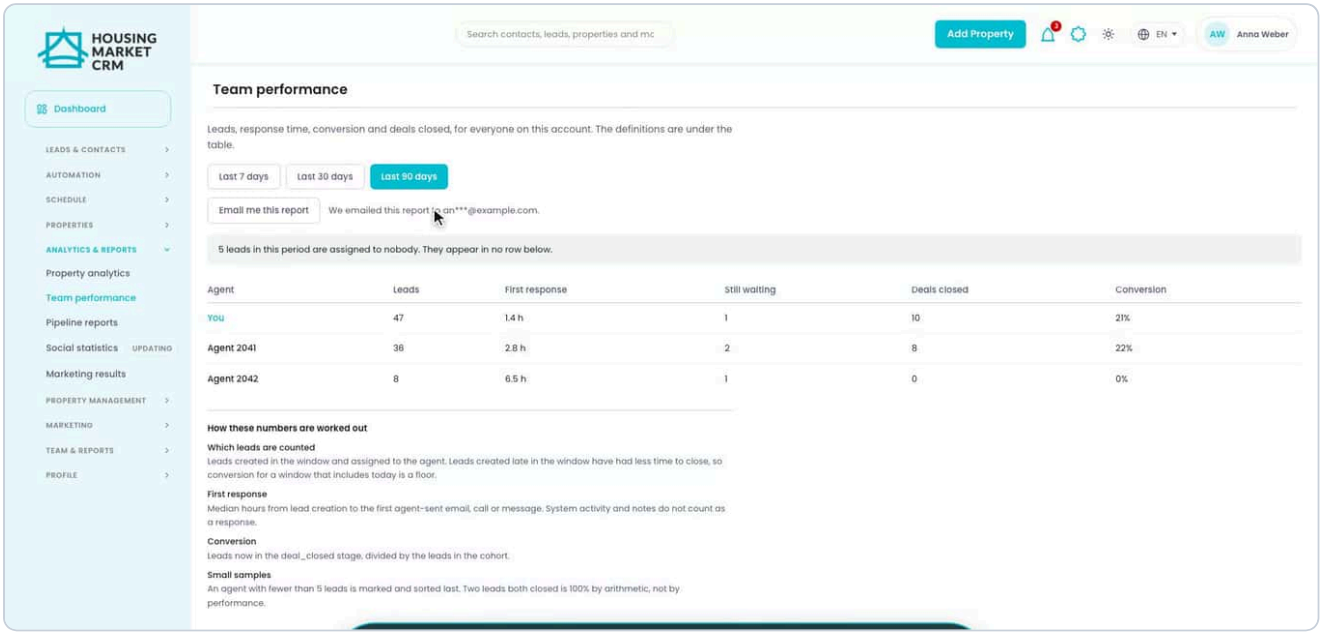


Figure 102.8 · Screen recorded 30 October 2026

9 Open the **CSV file** in a spreadsheet, keep it, or share it with your team.

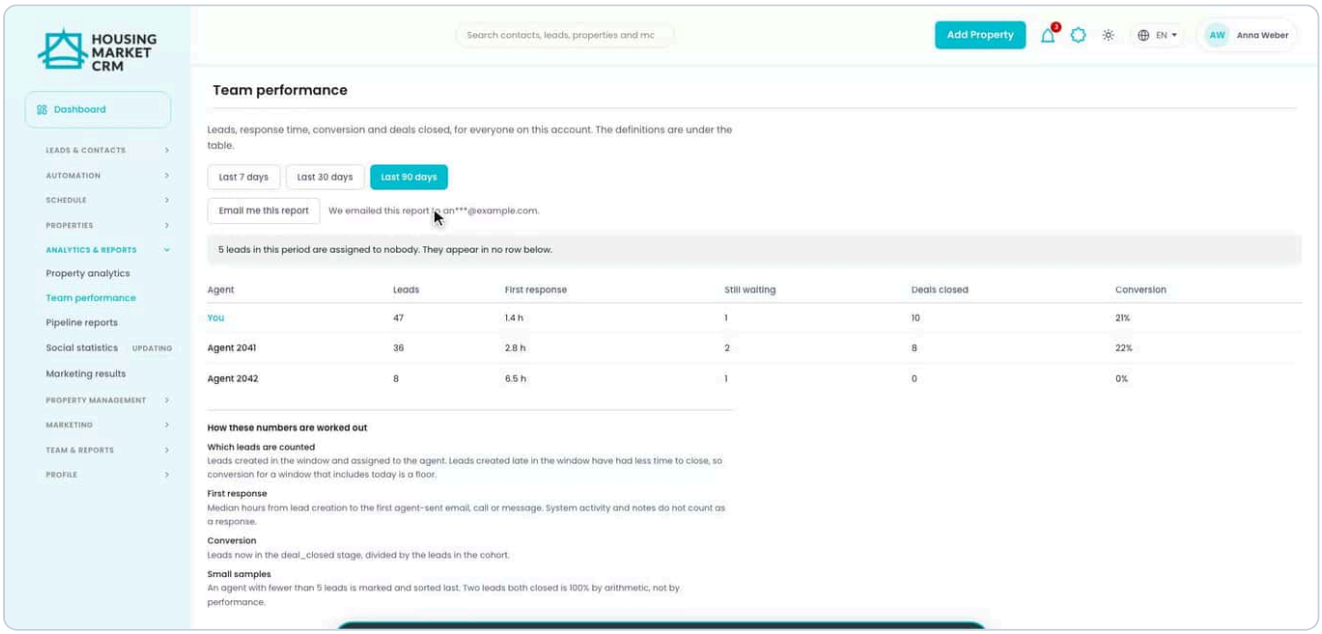


Figure 102.9 · Screen recorded 30 October 2026

10 Read **how these numbers are worked out** before you share it.

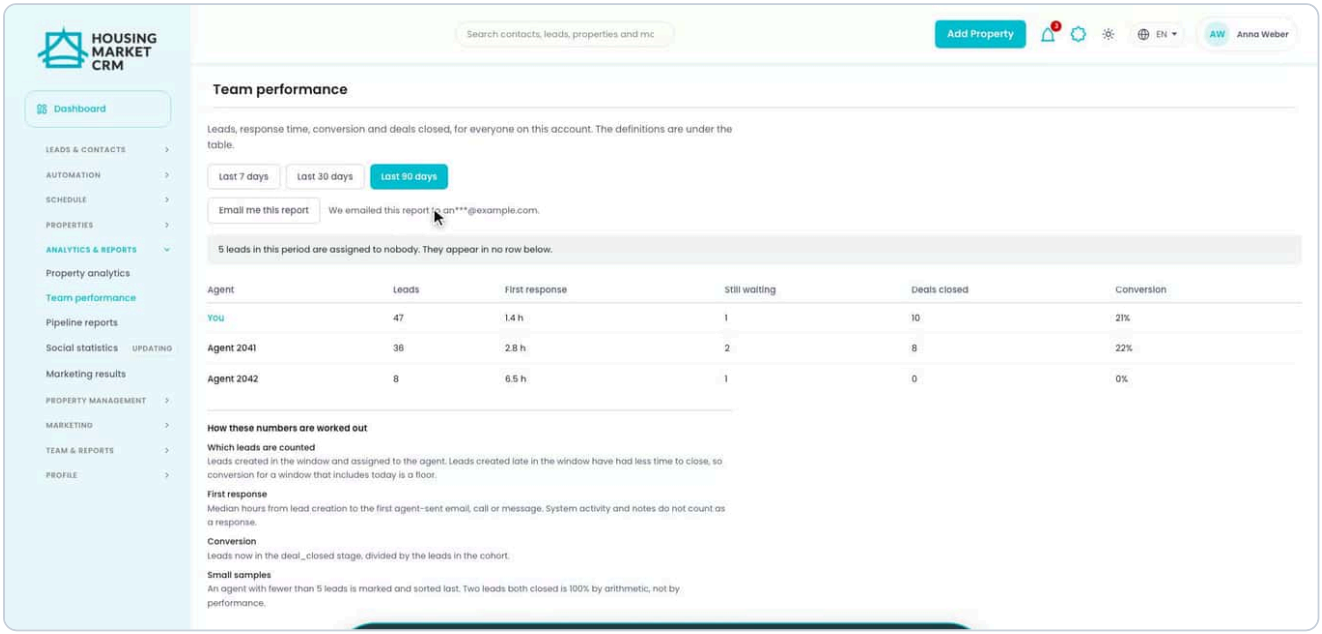


Figure 102.10 · Screen recorded 30 October 2026

RELATED HELP CENTER ARTICLES

What do team leaderboards and the weekly owner email show?	faq.housingmarketgroup.com/faq/what-do-team-leaderboards-and-the-weekly-owner-email-show

103 CHAPTER 103

Apply for Verified Agent status

All plans | For agents | Watch the video

OVERVIEW

Open Verified agent in the CRM, upload your licence and identity documents, and pay the review fee. The Housing Market Group team checks every application, and the check is repeated every year.

The verified agent badge says that Housing Market Group has checked who you are and that you are licensed to do this work. It appears beside your name on your listings and on your public agent profile on the portal, and it is only ever shown for an application the review team approved.

Applying

- Choose Verified agent in the menu, under Profile. If it is not there, applications are not open for your account yet; the page appears by itself when they are, and there is nothing you need to do in the meantime.
- Add your documents. PDF, JPEG, PNG, WEBP or HEIC files, up to 15 MB each and at most 10 files in one application.
- Give each file a Document type: Licence, Identity document, Agency registration, Phone bill or Other.
- Add a note for the reviewer if there is anything they should know. It is optional.
- Choose Pay and submit, and pay in the secure checkout.

Applying through the CRM costs 19 USD per year, and the page shows you the exact amount before you pay. The fee pays for the review and not for its outcome, so an application that is not approved is not refunded. It buys no part of any plan: Pro and Business are separate, and an agent on the free plan can apply just as well.

Your documents are saved when you choose to pay, so a payment you cancel costs you nothing and you can come back and pay later — the application waits, and says on your screen that it has not reached the review team yet. Once the payment goes through, the application is submitted by the payment itself rather than by your browser, so closing the tab does not lose it.

Two accounts cannot apply: a support session signed in on your behalf, and an account with no home portal — a verification has to be reviewed somewhere, and the CRM says which of the two it is rather than failing silently.

While it is reviewed

The page shows where your application stands, from Waiting for review through In review to Approved or Not approved, and we email you when there is a decision. We do not publish how long a review takes, because that would be a promise about a queue of people rather than about software.

Renewing

Verification lasts a year, and the page tells you the date yours runs to. The fee is charged again each year, and that renewal payment is what opens the yearly re-check: a fresh application goes to the review team carrying the documents they saw last time, so there is nothing for you to upload again. Sending every verified agent in every country away to start their own re-check by hand was the alternative, and it would never have happened.

If the renewal is not paid — you cancelled it, or a card failed — no re-check is opened and the badge lapses on its own date, exactly as it would have if you had never renewed. Applying again starts a new application.

Verified agent is separate from the three free badges for your licence, your agency and your telephone number, which cost nothing on any plan. See "How do reviews and verification badges work?".

From the Help Center: **How do I become a verified agent?**

STEP BY STEP

1. Open your **Housing Market CRM** account.

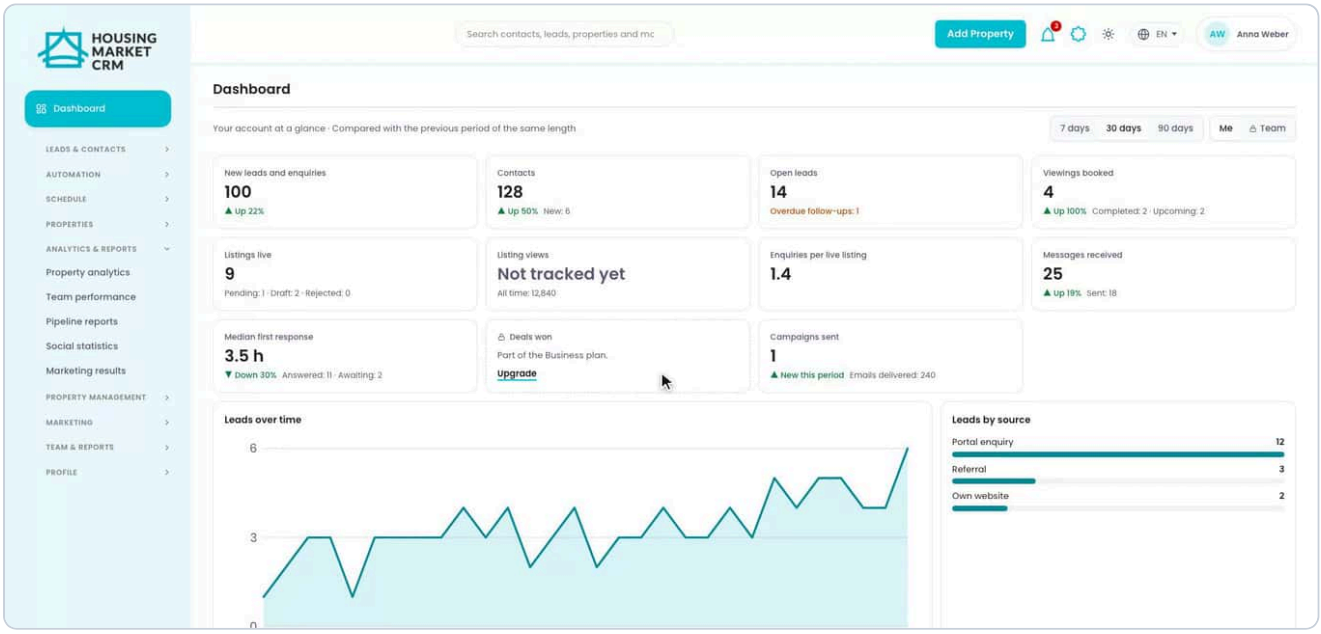


Figure 103.1 · Screen recorded 1 November 2026

2 Open **Profile** in the left menu.

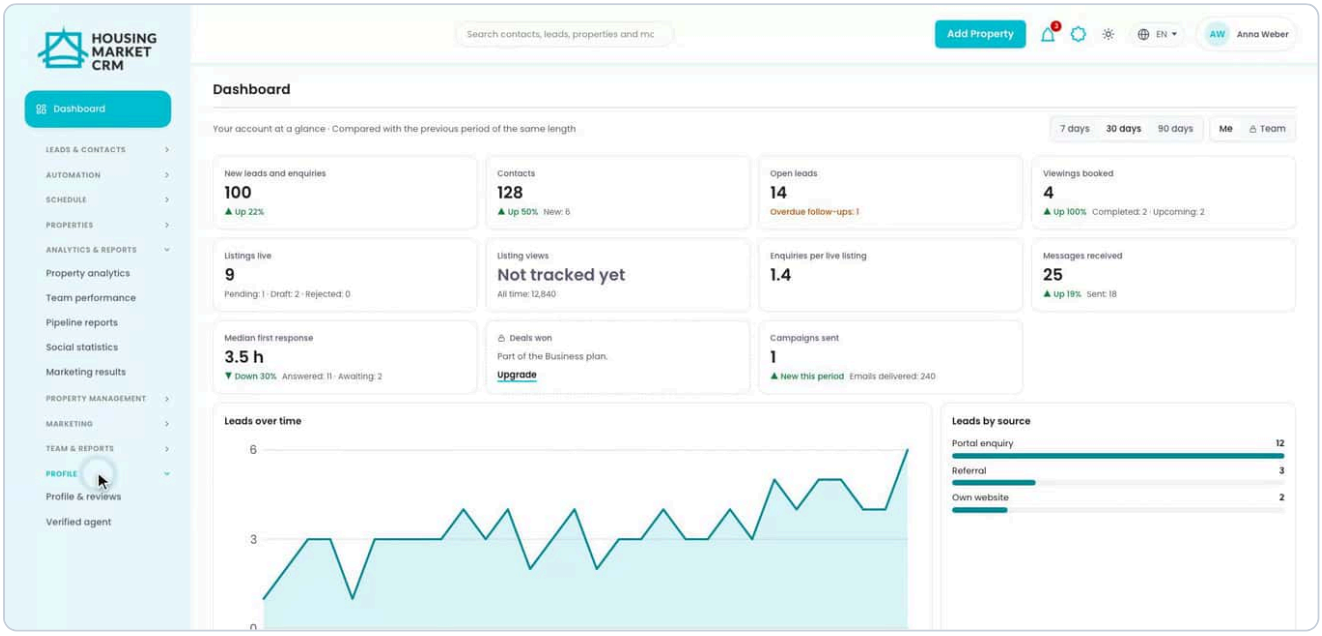


Figure 103.2 · Screen recorded 1 November 2026

3 Click **Verified agent**.

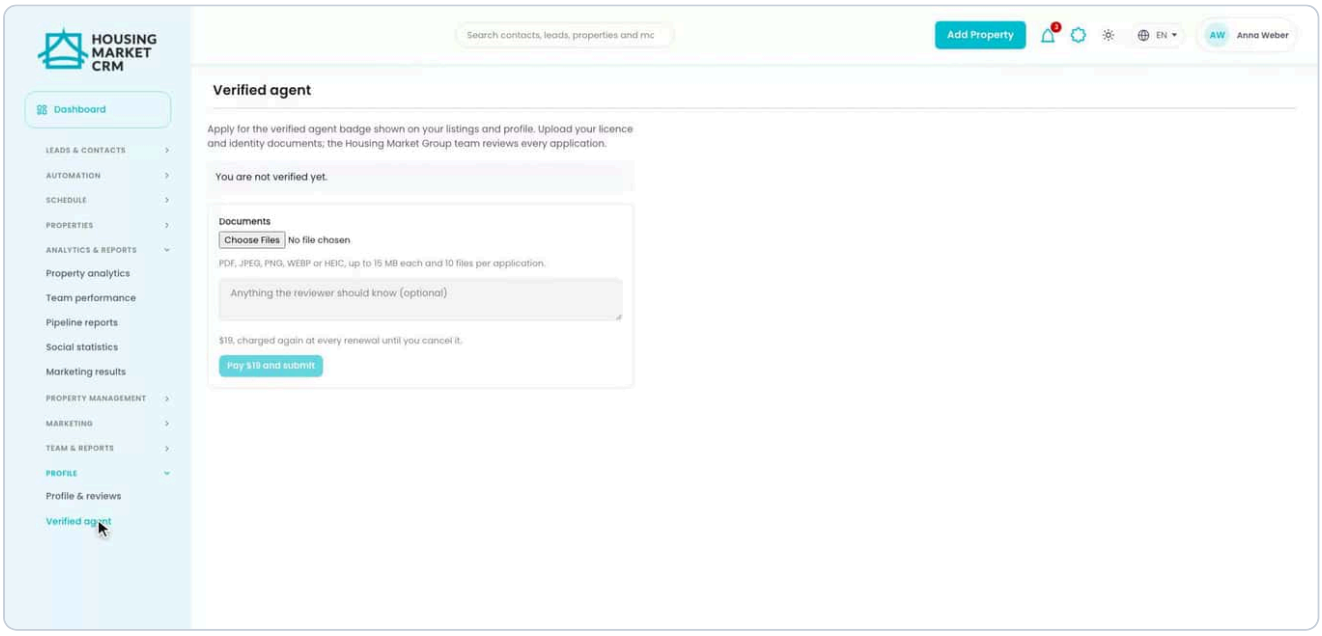


Figure 103.3 · Screen recorded 1 November 2026

4 The **badge** shows on your listings and your profile.

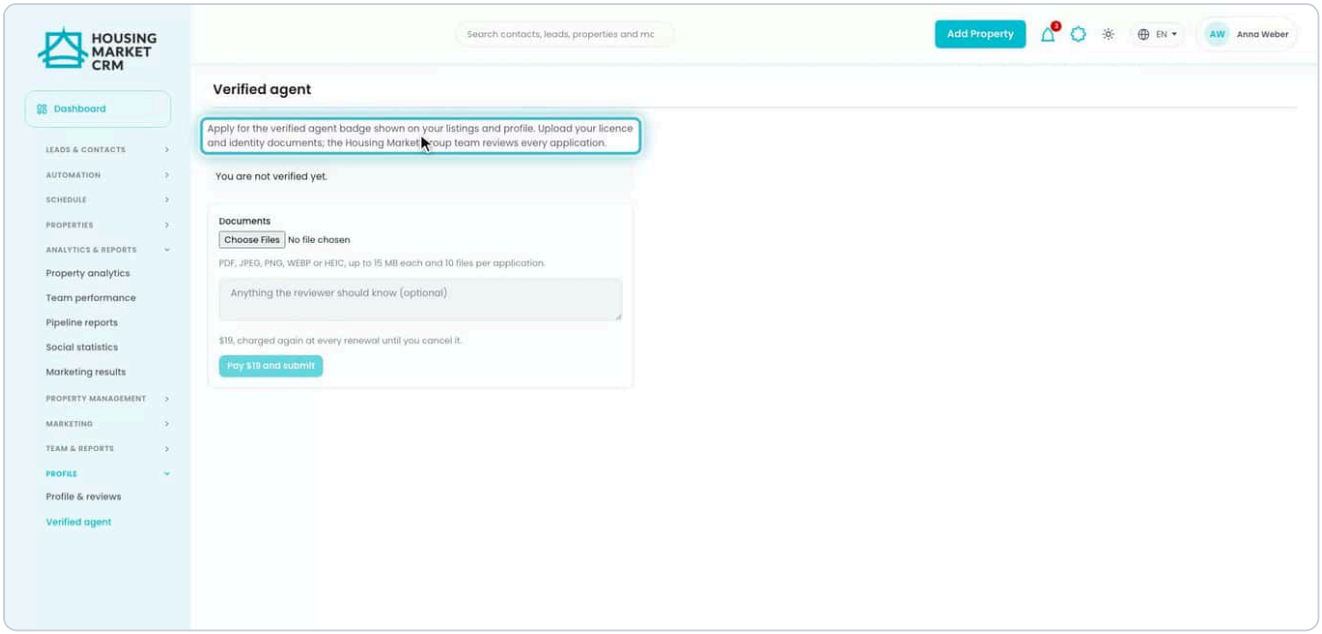


Figure 103.4 · Screen recorded 1 November 2026

5 Your current status is shown at the top.

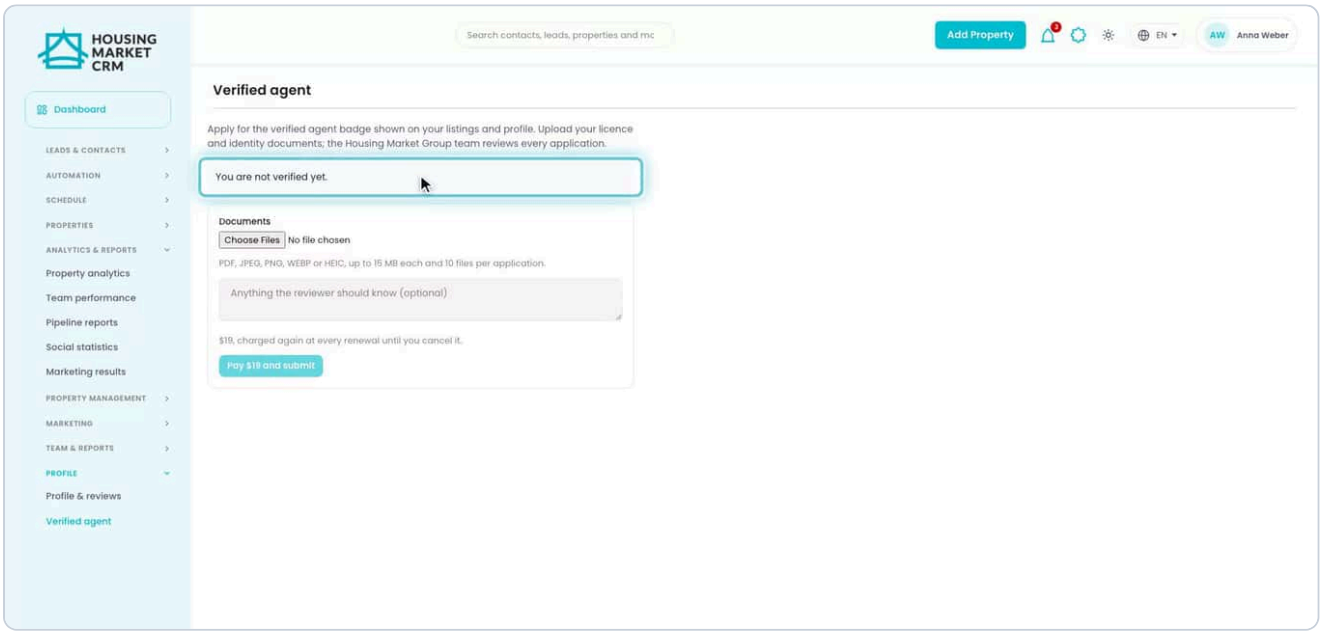


Figure 103.5 · Screen recorded 1 November 2026

6 Under **Documents**, choose your files.

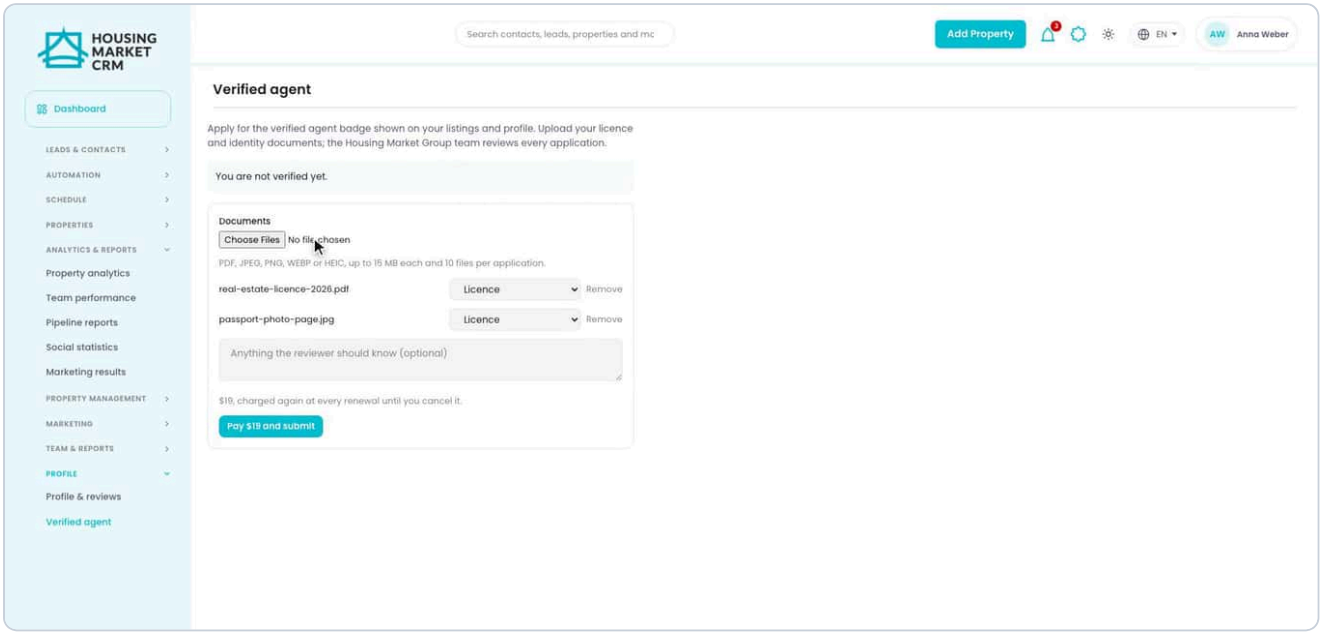


Figure 103.6 · Screen recorded 1 November 2026

7 PDF or photo files, up to **15 MB** each.

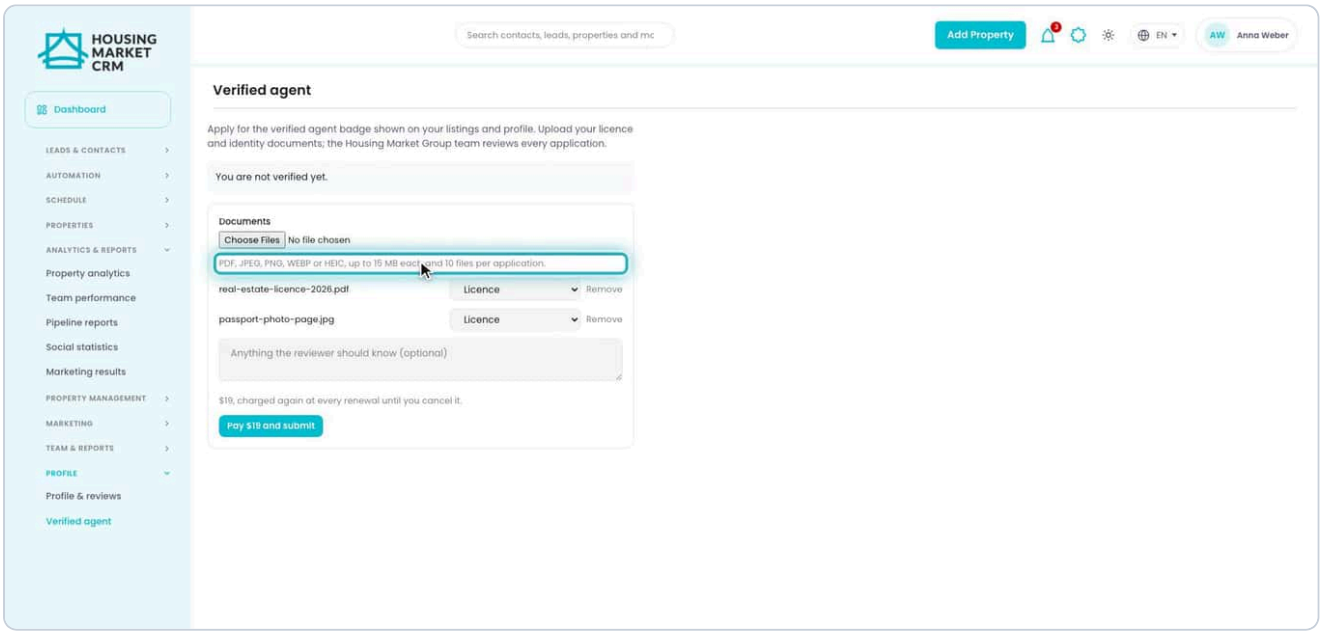


Figure 103.7 · Screen recorded 1 November 2026

8 Each file starts as a **Licence**.

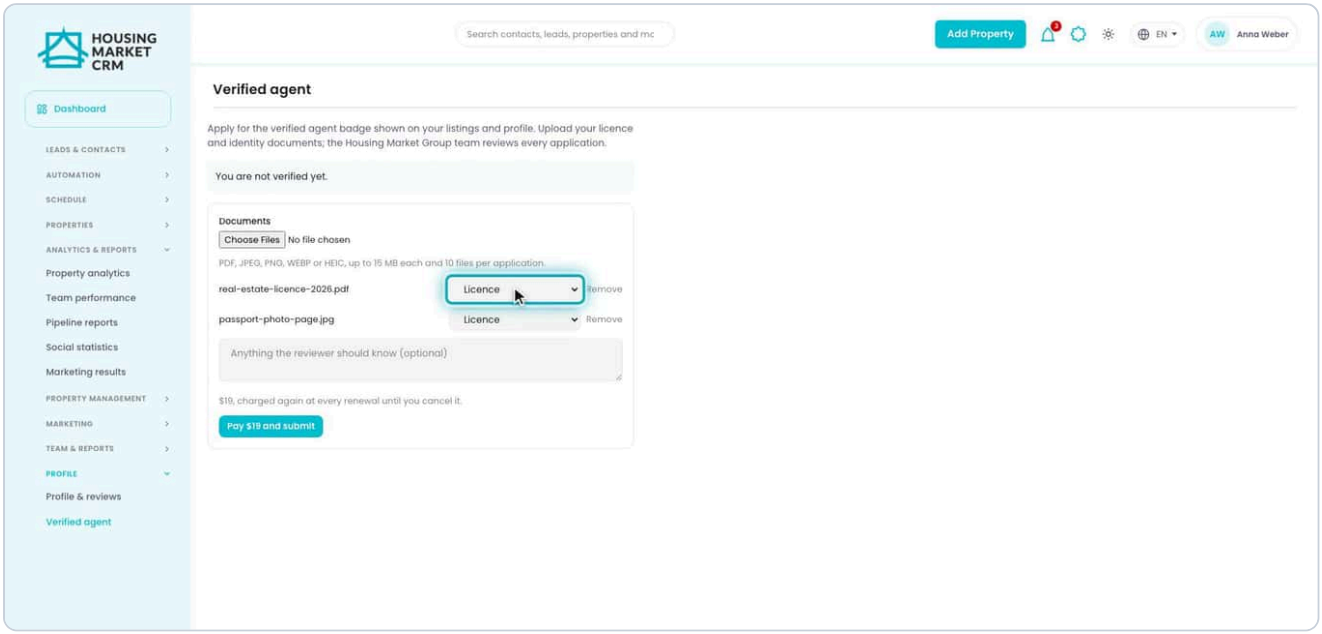


Figure 103.8 · Screen recorded 1 November 2026

9 Label the second one **Identity document**.

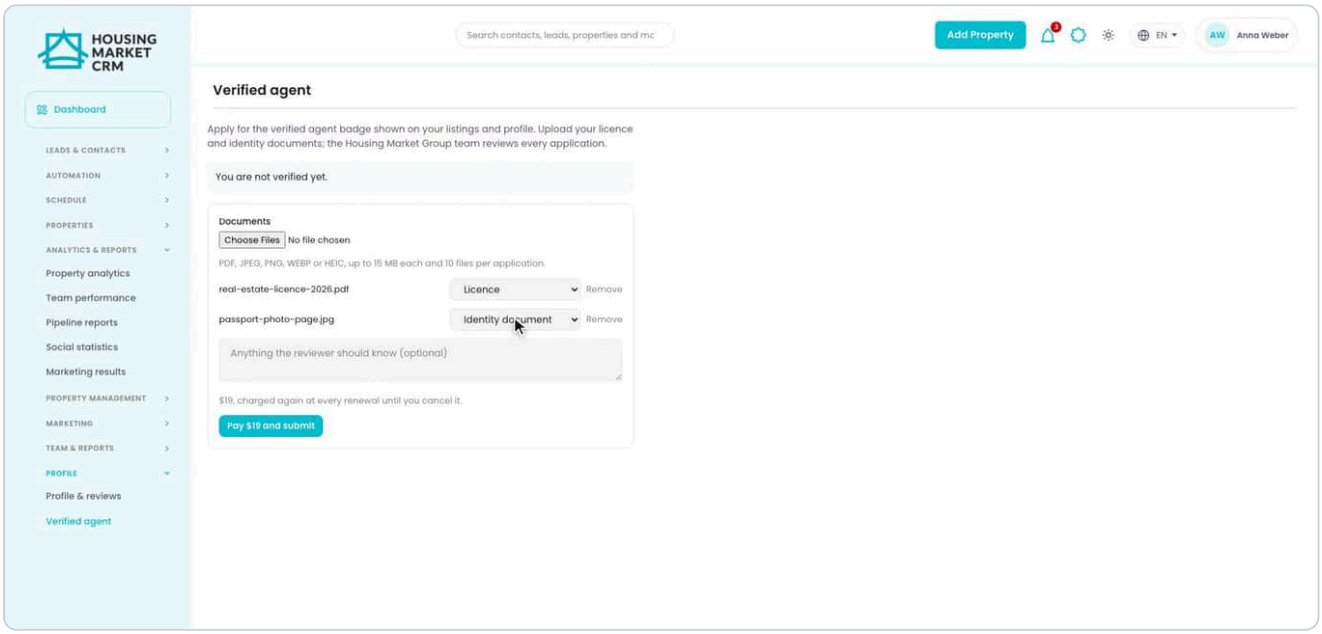


Figure 103.9 · Screen recorded 1 November 2026

10 Add a **note** for the reviewer if you like.

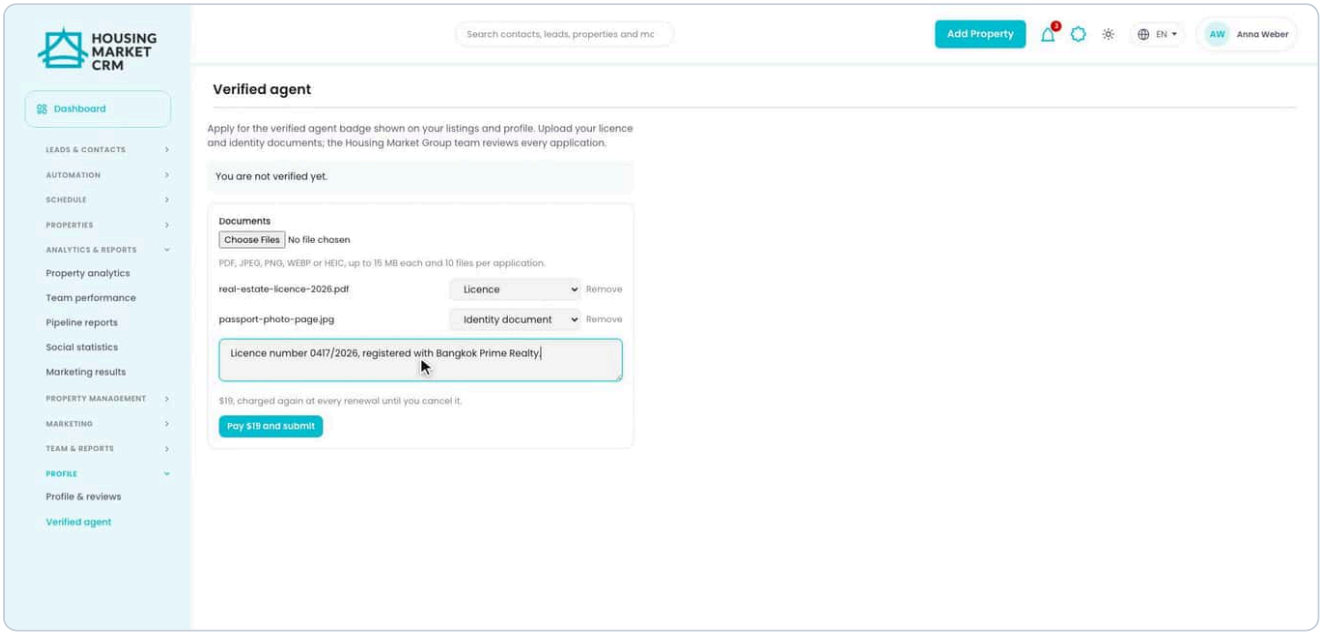


Figure 103.10 · Screen recorded 1 November 2026

11 The review fee is **$19.00 a year**.

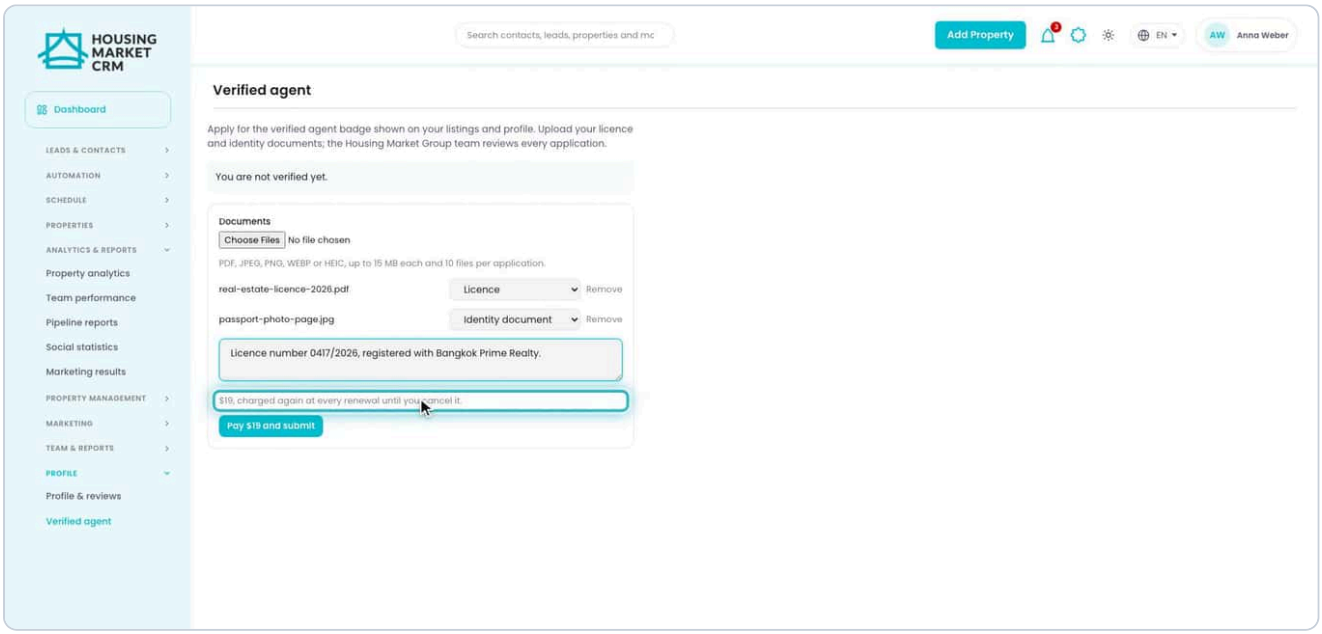


Figure 103.11 · Screen recorded 1 November 2026

12 It pays for the **review**, not for its outcome.

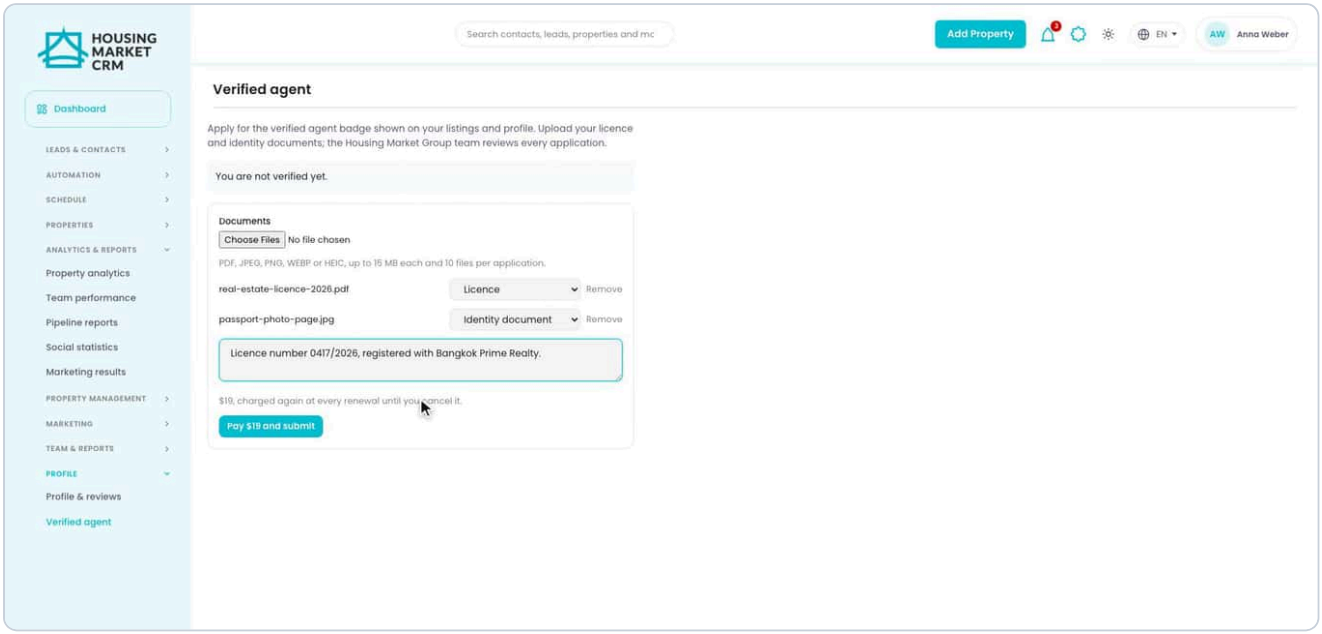


Figure 103.12 · Screen recorded 1 November 2026

13 Click **Pay and submit** to pay on a **secure payment page**.

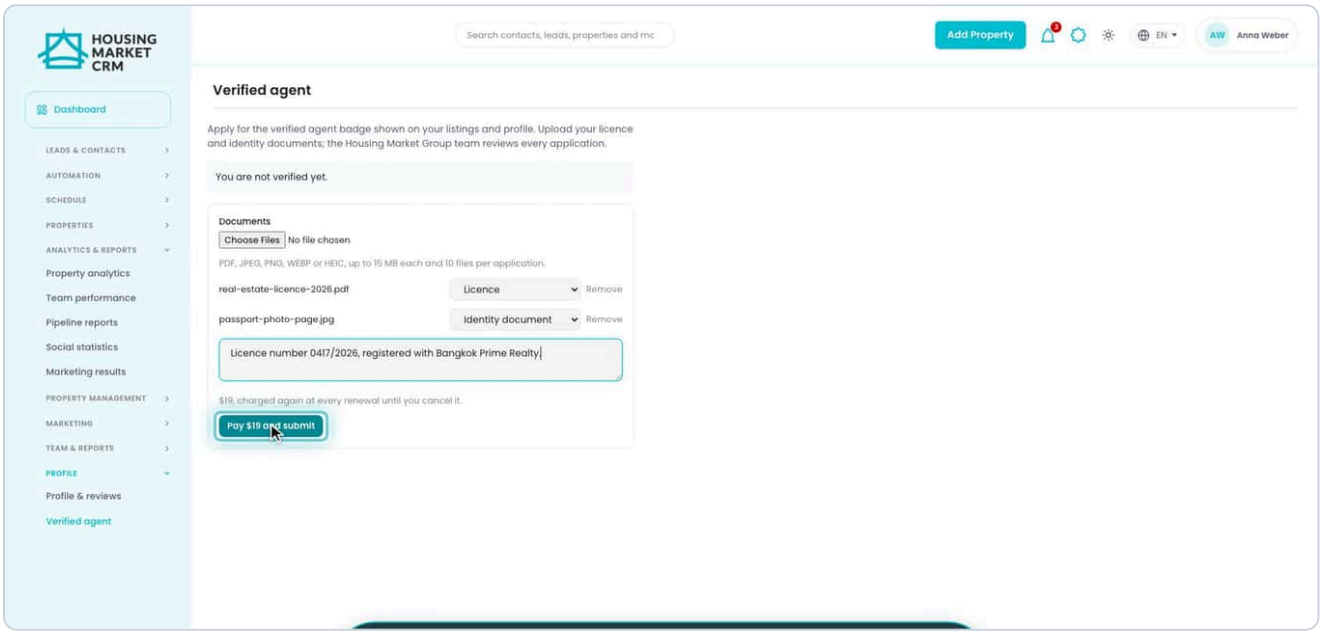


Figure 103.13 · Screen recorded 1 November 2026

14 Once payment is confirmed, the **review team** checks your documents.

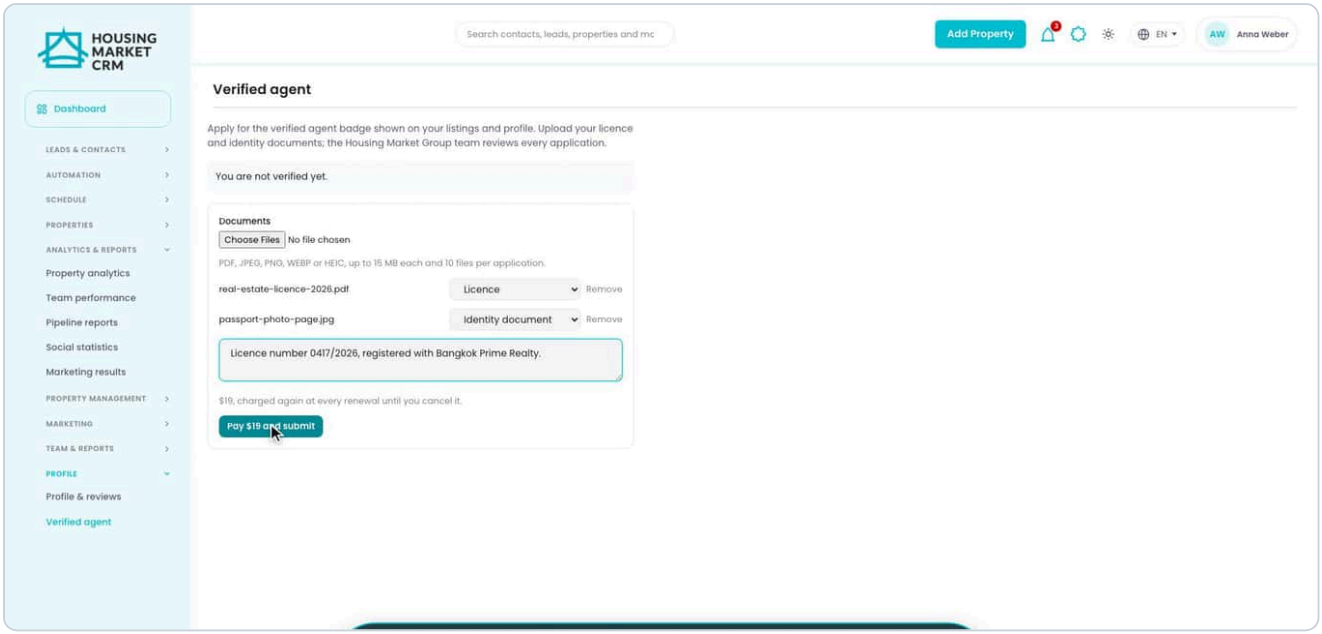


Figure 103.14 · Screen recorded 1 November 2026

15 The badge appears here, with its expiry date, when you are approved.

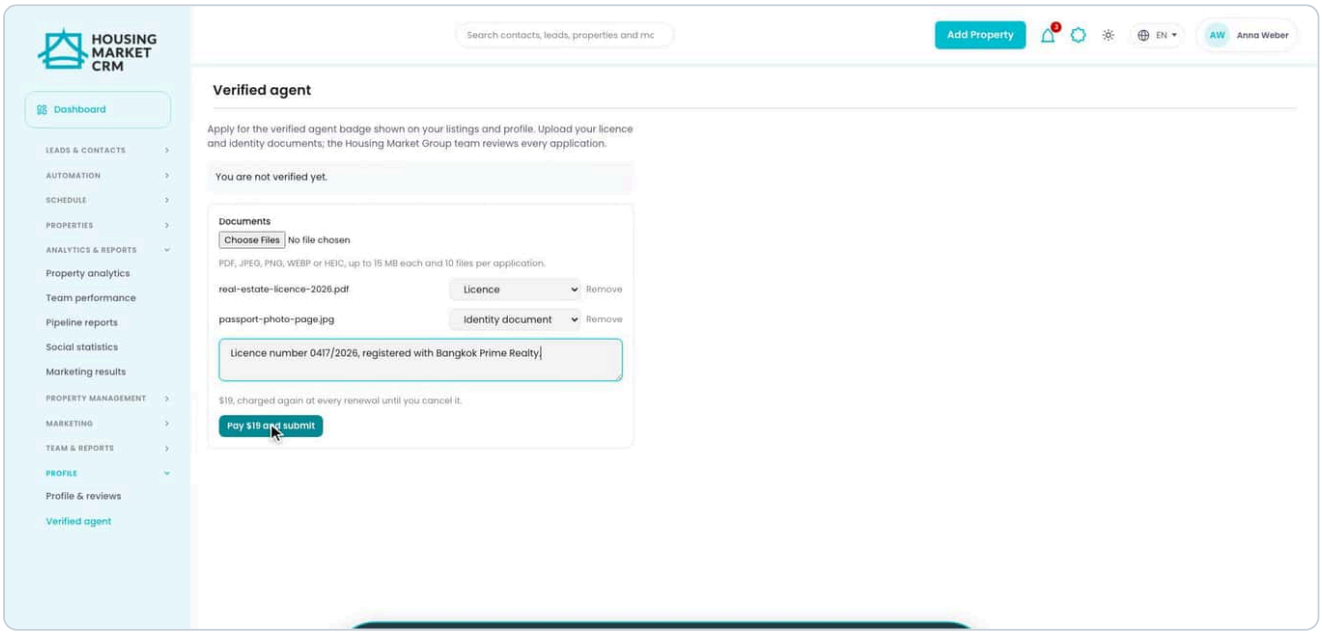


Figure 103.15 · Screen recorded 1 November 2026

RELATED HELP CENTER ARTICLES

How do reviews and verification badges work?	faq.housingmarketgroup.com/faq/how-do-reviews-and-verification-badges-work

PART 8

Developers and new developments

104 Create a developer project

105 Add units and use the availability grid

106 Publish a price list

107 Developer plans and publishing a project

108 Reserve a new-development unit as an agent

109 Approve reservations and track commissions

110 Launch an off-plan development

111 Message a developer

112 Choose which agents are alerted

113 Choose which new development alerts you hear

104 CHAPTER 104

Create a developer project

Developer plan | For property developers | Watch the video

OVERVIEW

An application for property developers to launch off-plan projects: floor plans, unit types, price lists, media and a live grid of available, reserved and sold units, with a project page on the country portal.

Each project has a page on the country portal showing which units are available, and enquiries from it arrive as the developer's leads. The developer's dashboard shows sales progress, units by status, agent performance and the reservation pipeline.

Agents who use Housing Market CRM see developer projects and their available units, can reserve a unit for their buyer and track commission per unit sold.

The Developer Launch Platform is an add-on to Housing Market CRM, bought on any plan, the free one included. Building a project is free. Publishing its page is charged per month by the number of active projects: 149 USD for one, 499 USD for up to five, or 999 USD for unlimited projects. Agents browse projects and reserve units at no charge.

From the Help Center: **What is the Developer Launch Platform?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

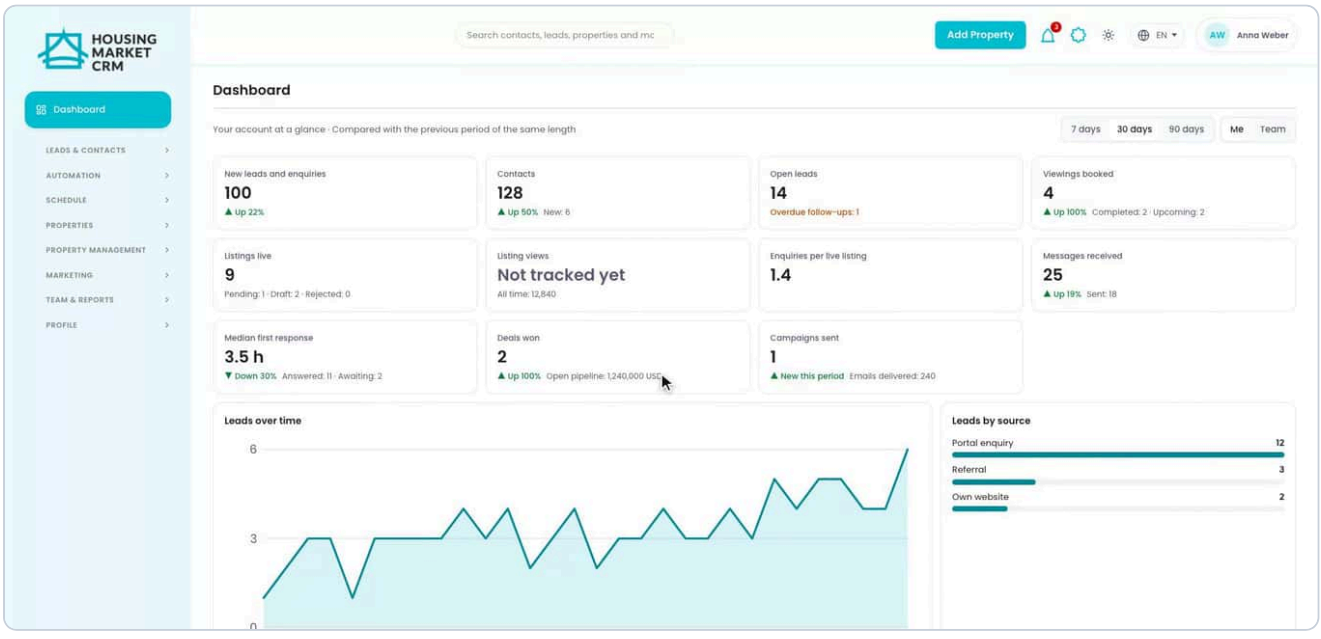


Figure 104.1 · Screen recorded 23 October 2026

2 Open **Properties** in the left menu.

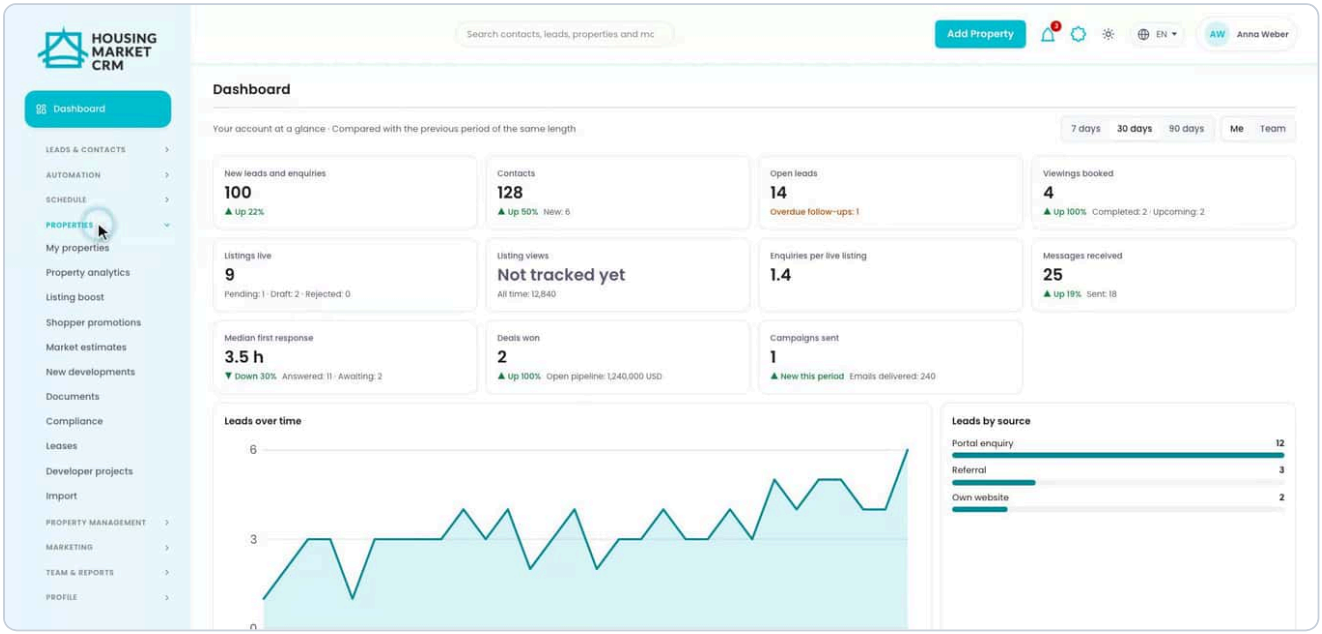


Figure 104.2 · Screen recorded 23 October 2026

3 Click **Developer projects** in the left menu.

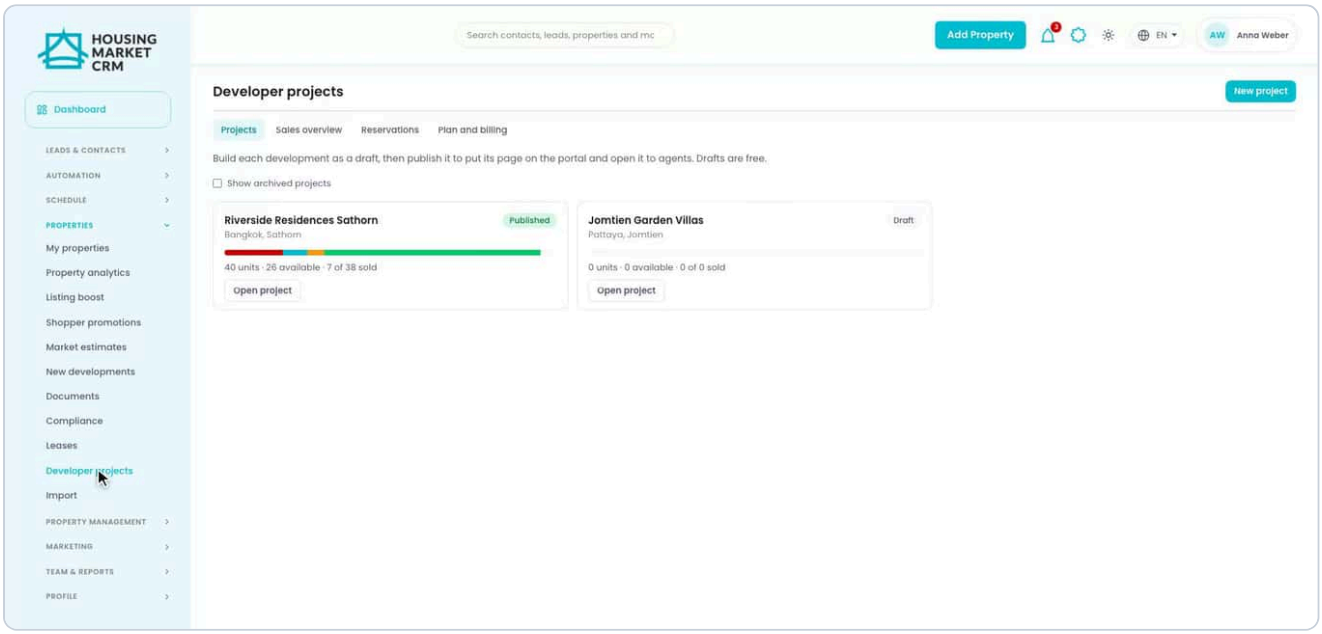


Figure 104.3 · Screen recorded 23 October 2026

4 Every project starts as a **free draft**.

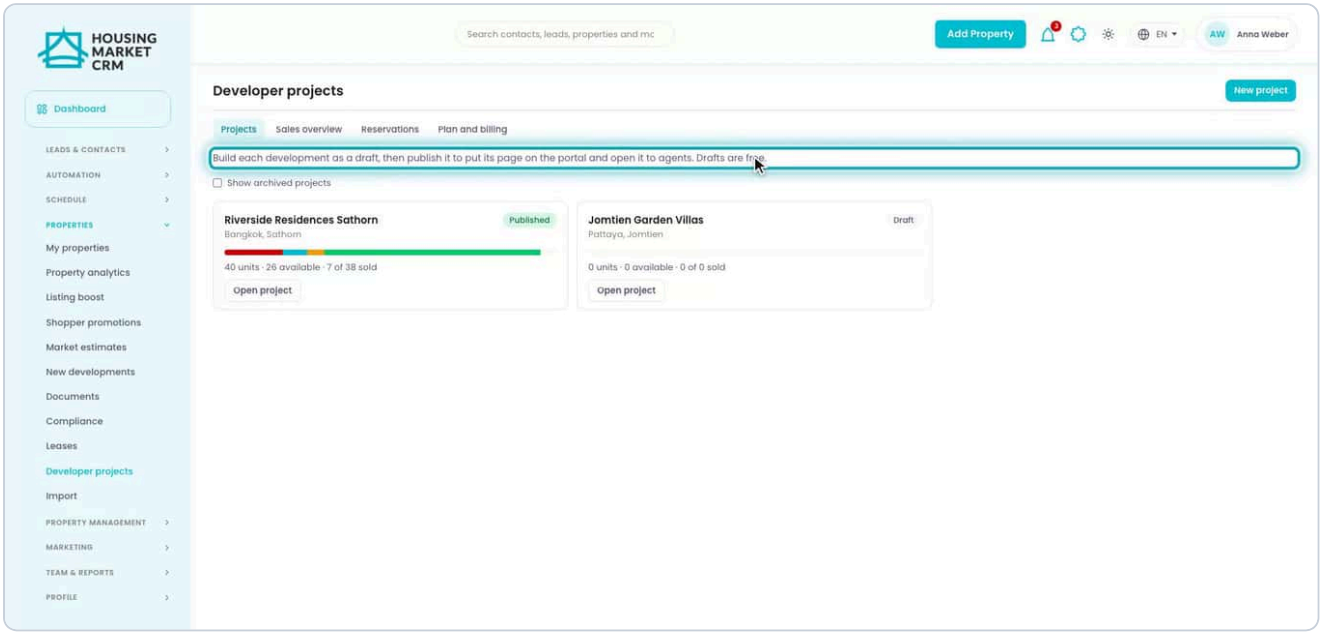


Figure 104.4 · Screen recorded 23 October 2026

5 Click **New project**.

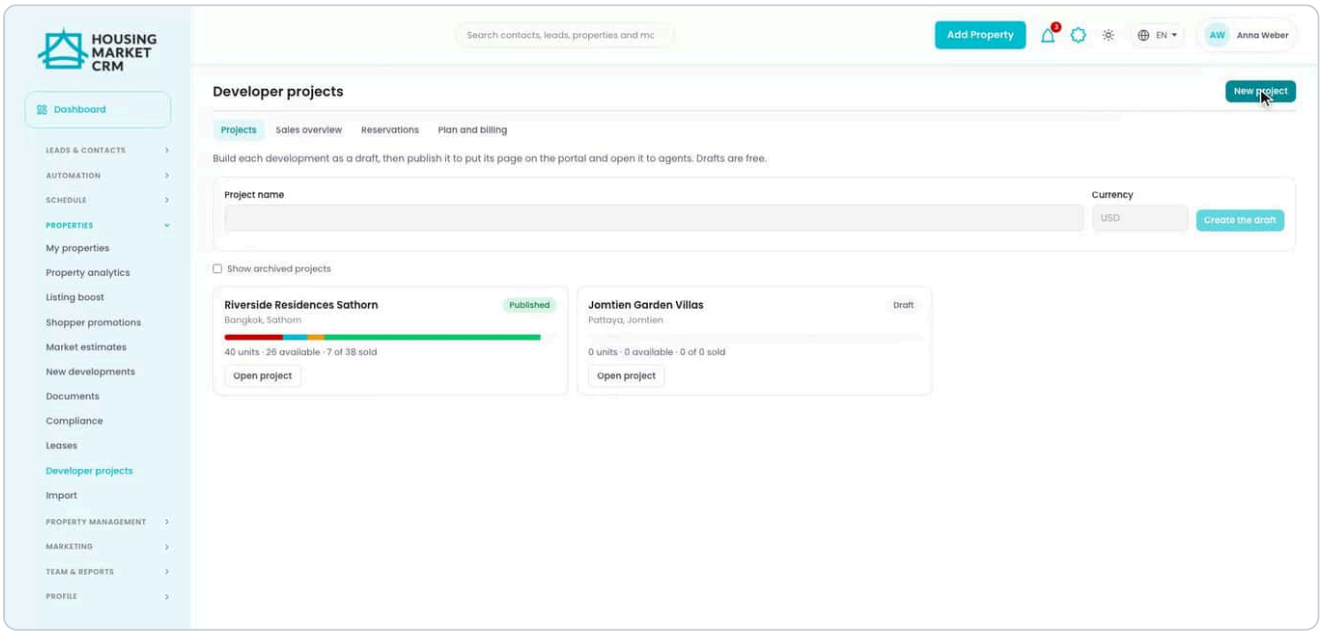


Figure 104.5 · Screen recorded 23 October 2026

6 Give it a **name**.

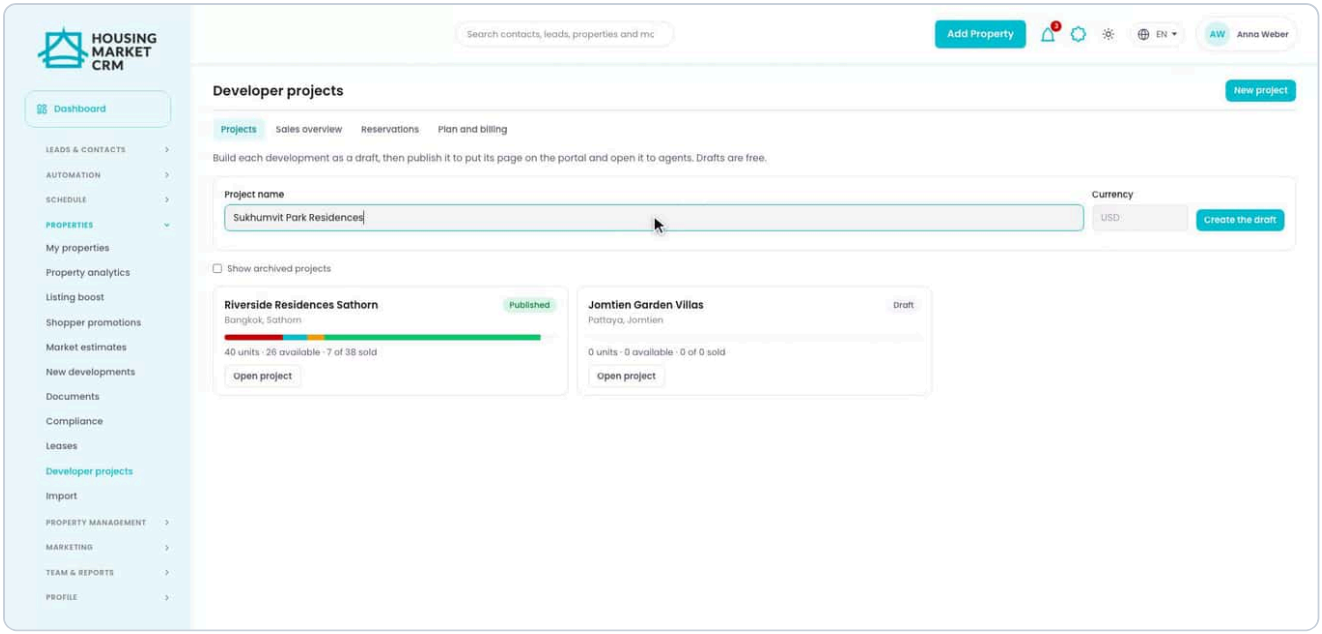


Figure 104.6 · Screen recorded 23 October 2026

7 Then **Create the draft**.

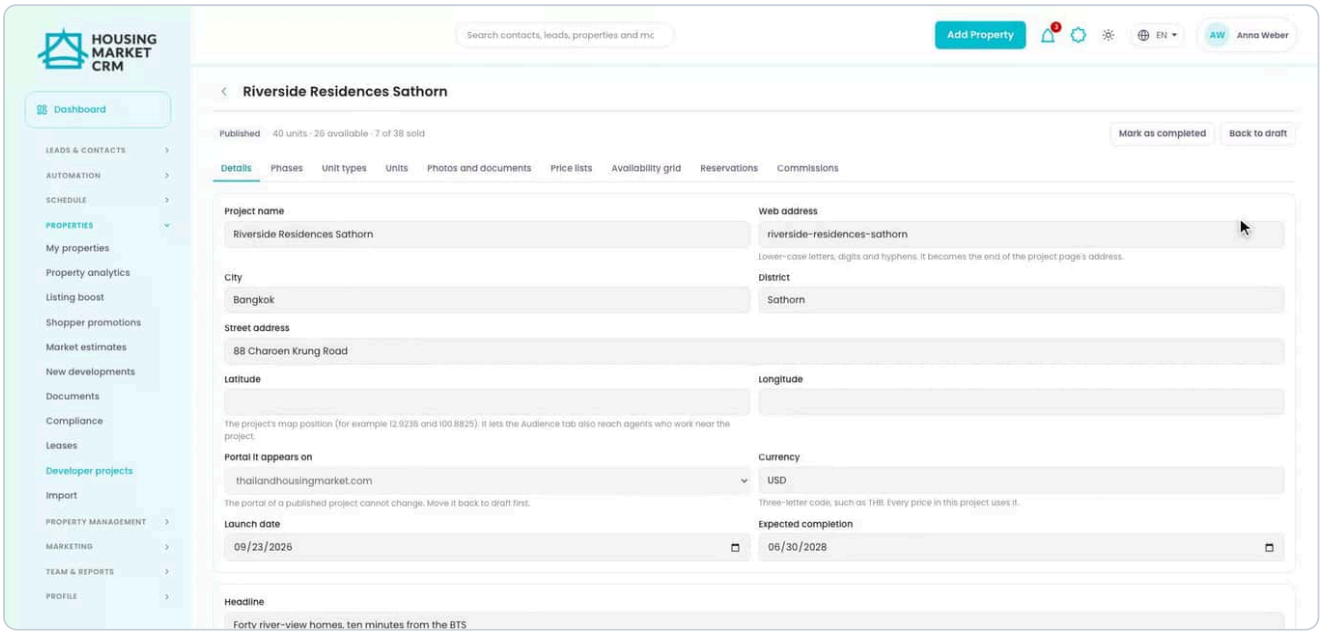


Figure 104.7 · Screen recorded 23 October 2026

8 Here is a project with its details filled in.

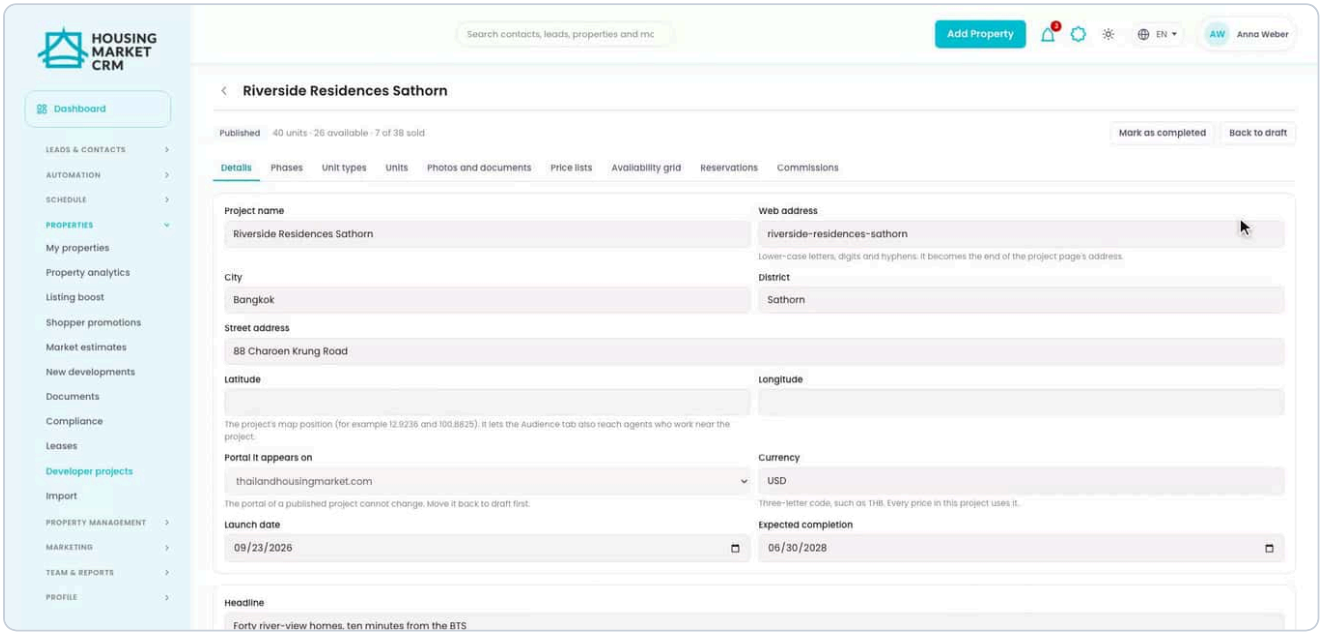


Figure 104.8 · Screen recorded 23 October 2026

9 The **hold time**: how long a reservation waits for you.

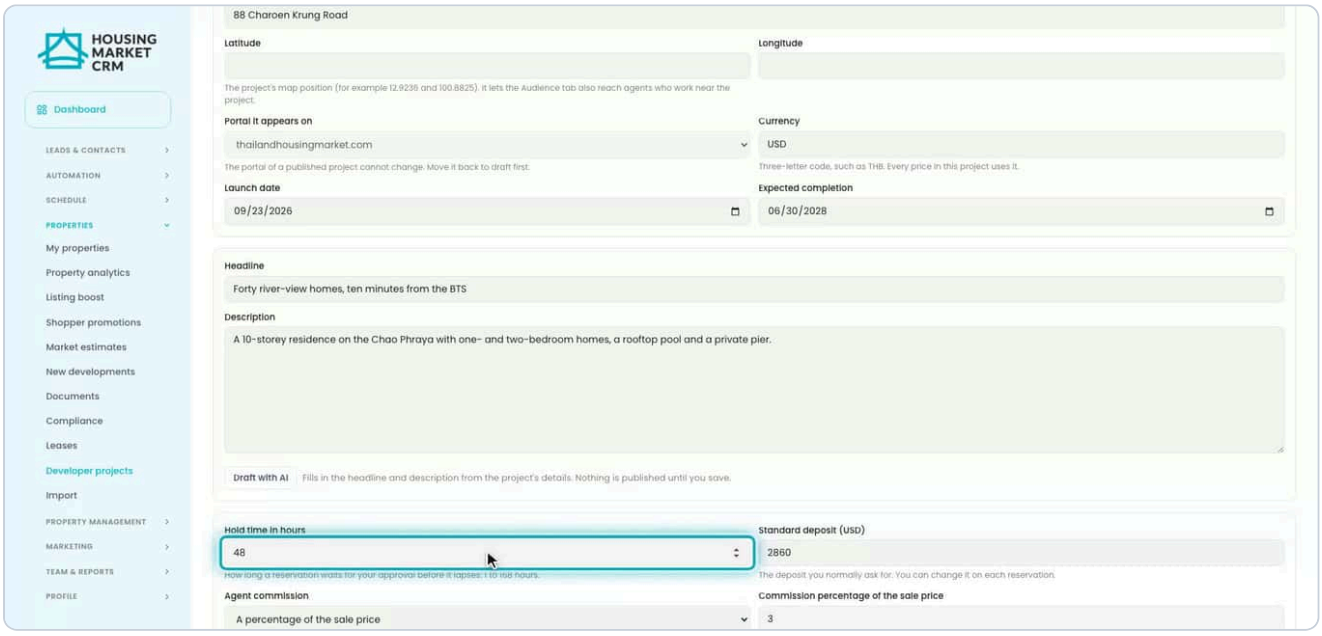


Figure 104.9 · Screen recorded 23 October 2026

10 The **commission** agents earn on a sale.

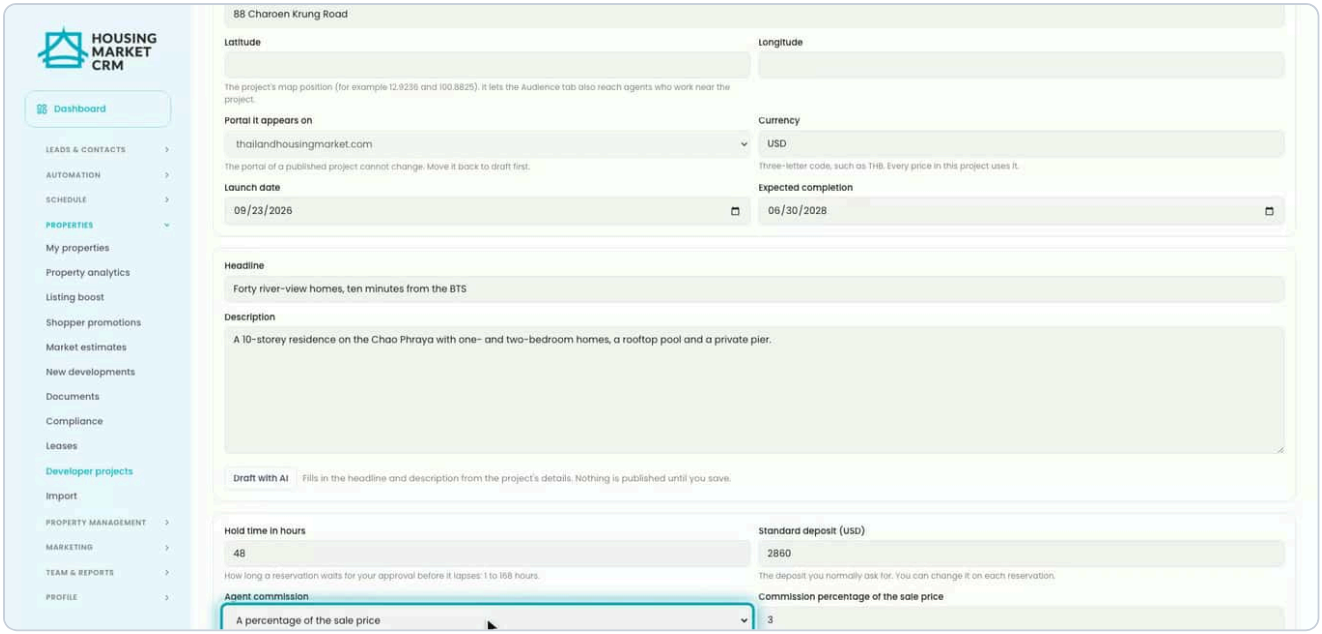


Figure 104.10 · Screen recorded 23 October 2026

11 Tick this to open it to **agents**.

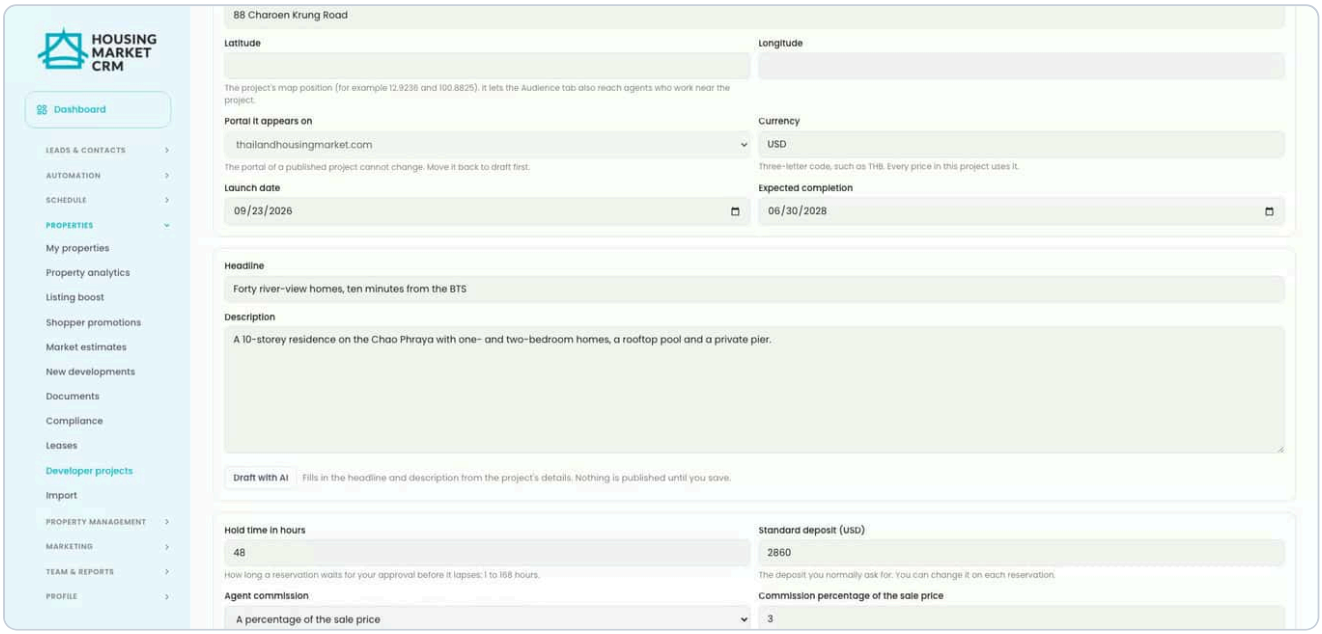


Figure 104.11 · Screen recorded 23 October 2026

12 Click **Save details.**

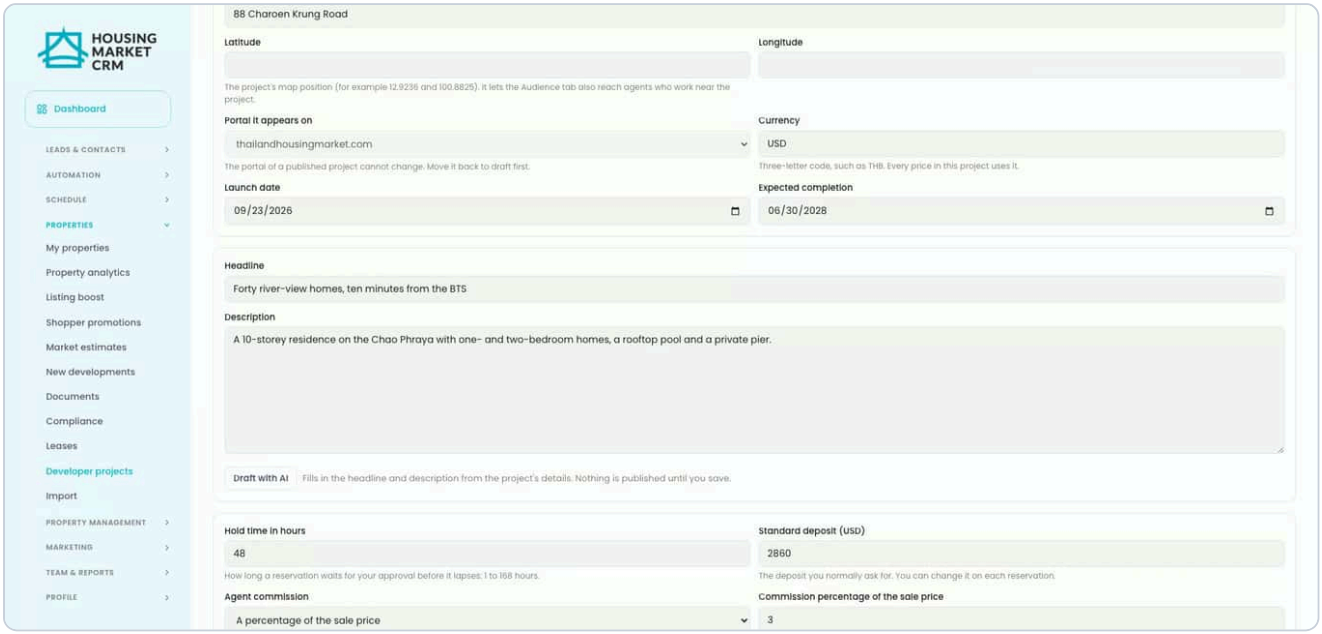


Figure 104.12 · Screen recorded 23 October 2026

RELATED HELP CENTER ARTICLES

Who is Housing Market CRM designed for?	faq.housingmarketgroup.com/faq/who-is-housing-market-crm-designed-for

105 CHAPTER 105

Add units and use the availability grid

Developer plan | For property developers | Watch the video

OVERVIEW

Open the project, add its unit types, create the units in one go from a prefix and a range of floors, and watch them on the Availability grid. A price list sets every unit's price at once and is read-only once published.

These steps are in a Developer Launch project (see "What is the Developer Launch Platform?"). Open Properties, then Developer projects, and open a project.

Phases, unit types and units

- A phase can be a tower, a building or a release.
- Under Unit types, add each floor plan a buyer can choose.
- Under Units, a prefix and a range of floors make every code. You can add them all at once, up to five hundred.

The availability grid

The Availability grid shows every unit as available, on hold, reserved, sold or off sale. Choose a unit to see it. A unit you take off sale can be put back the same way.

Price lists

One price list sets every unit's price at once. Open Price lists, choose New price list and give it a name and the date it takes effect. On a draft you can choose View prices to check it. Then choose Publish list: the units now carry the new prices, and the list is read-only from there.

Housing Market collects no money for any of this: prices and reservations are your record. For how agents reserve a unit, read "How do unit reservations work on the Developer Launch Platform?".

From the Help Center: **How do I add units and a price list to a developer project?**

STEP BY STEP

1 Open a project in **Developer projects**.

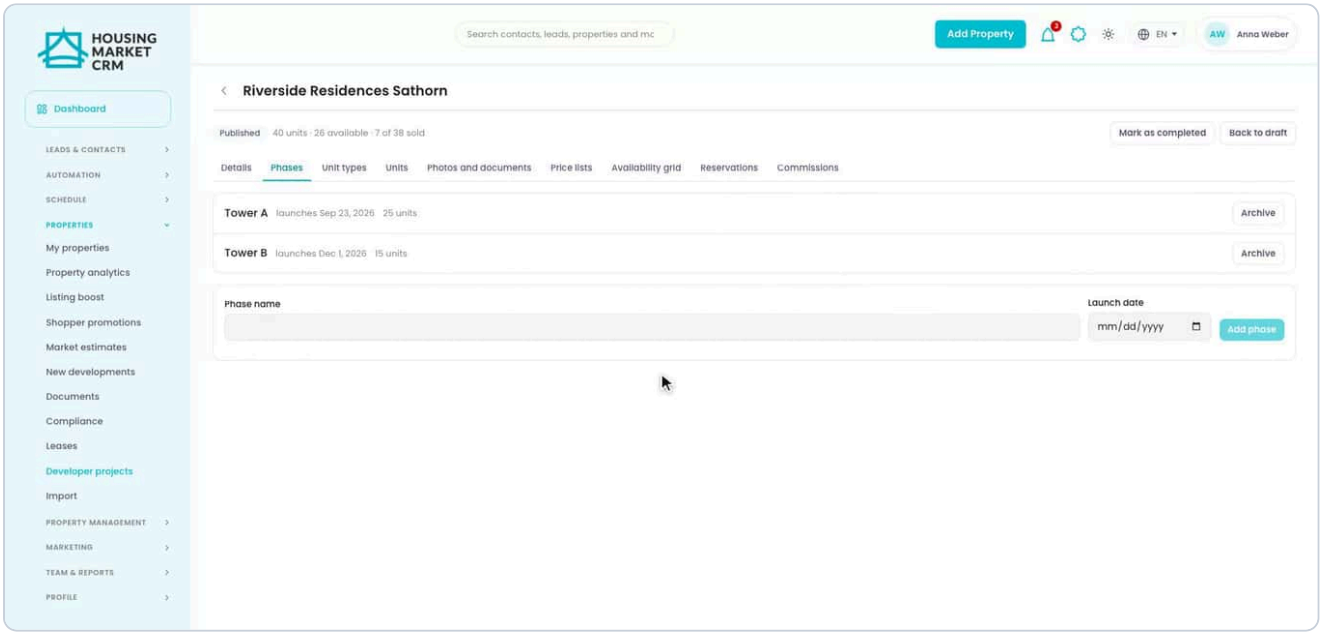


Figure 105.1 · Screen recorded 23 October 2026

2 A **phase** can be a tower, a building or a release.

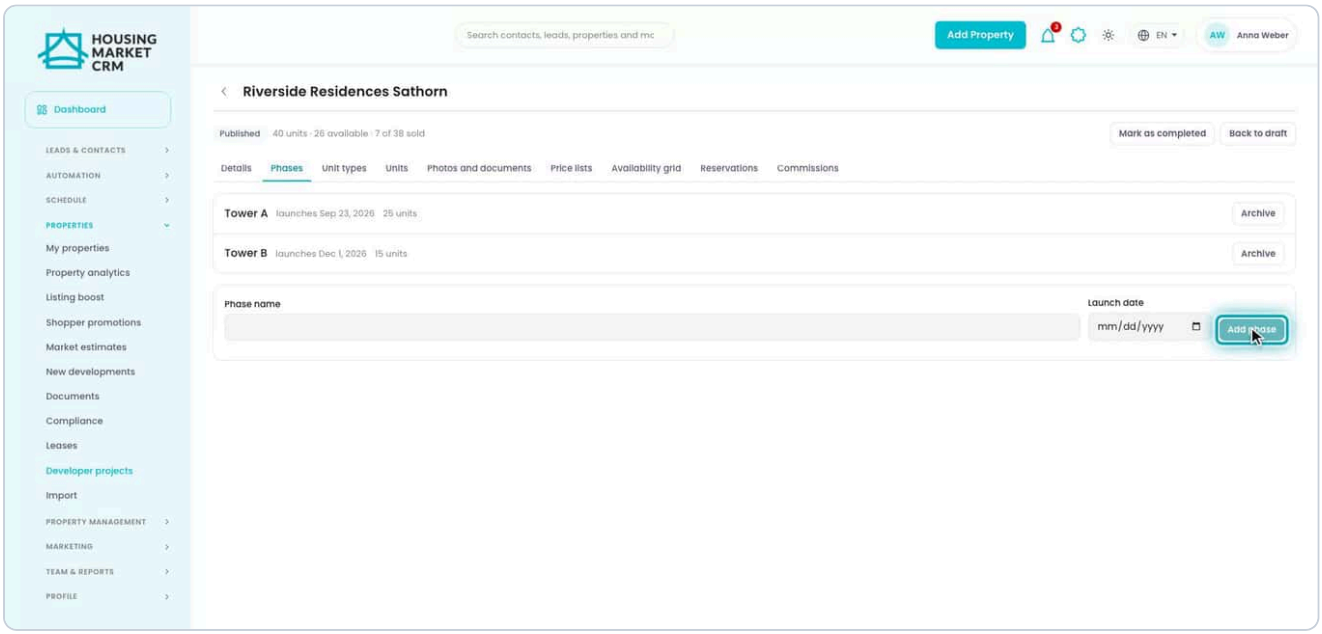


Figure 105.2 · Screen recorded 23 October 2026

3 Open **Unit types**: each floor plan a buyer can choose.

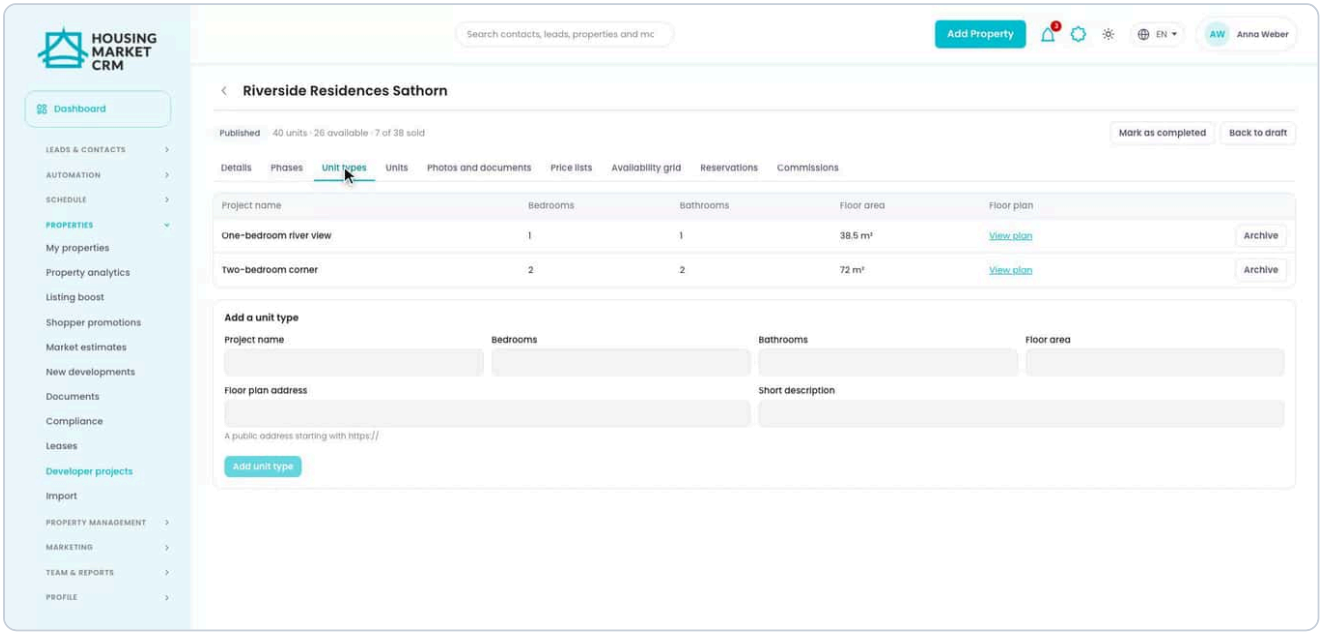


Figure 105.3 · Screen recorded 23 October 2026

4 Open **Units**.

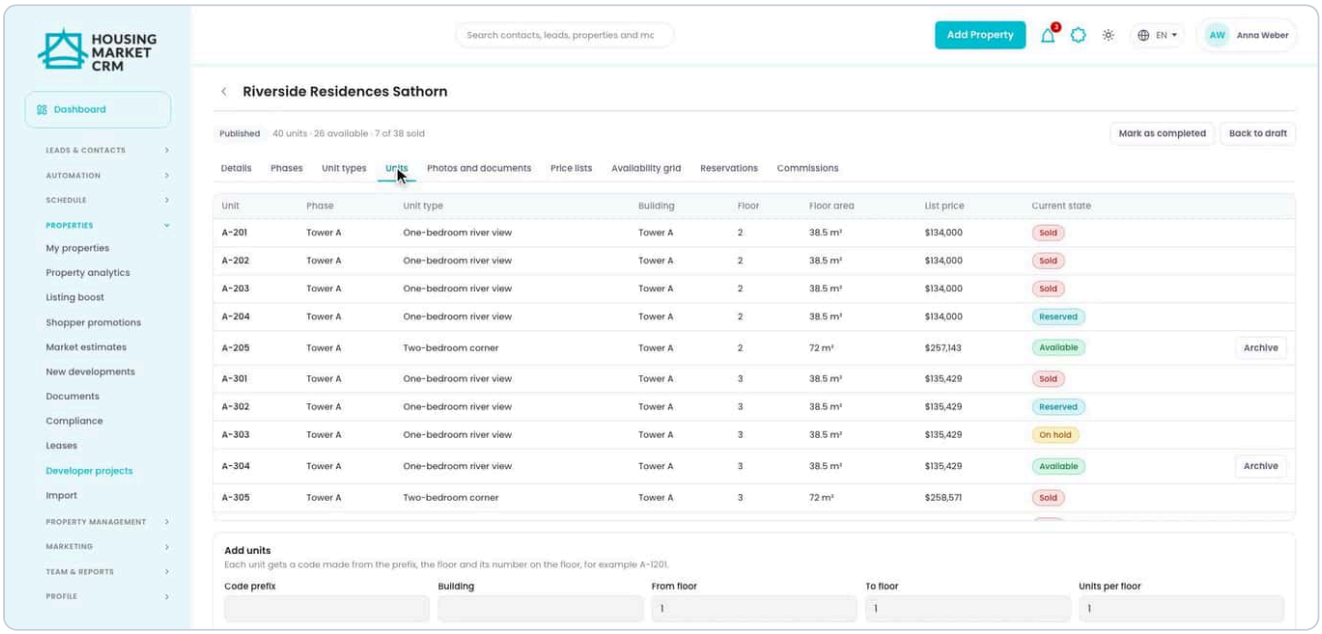


Figure 105.4 · Screen recorded 23 October 2026

5 A **prefix** and a range of **floors** make every code.

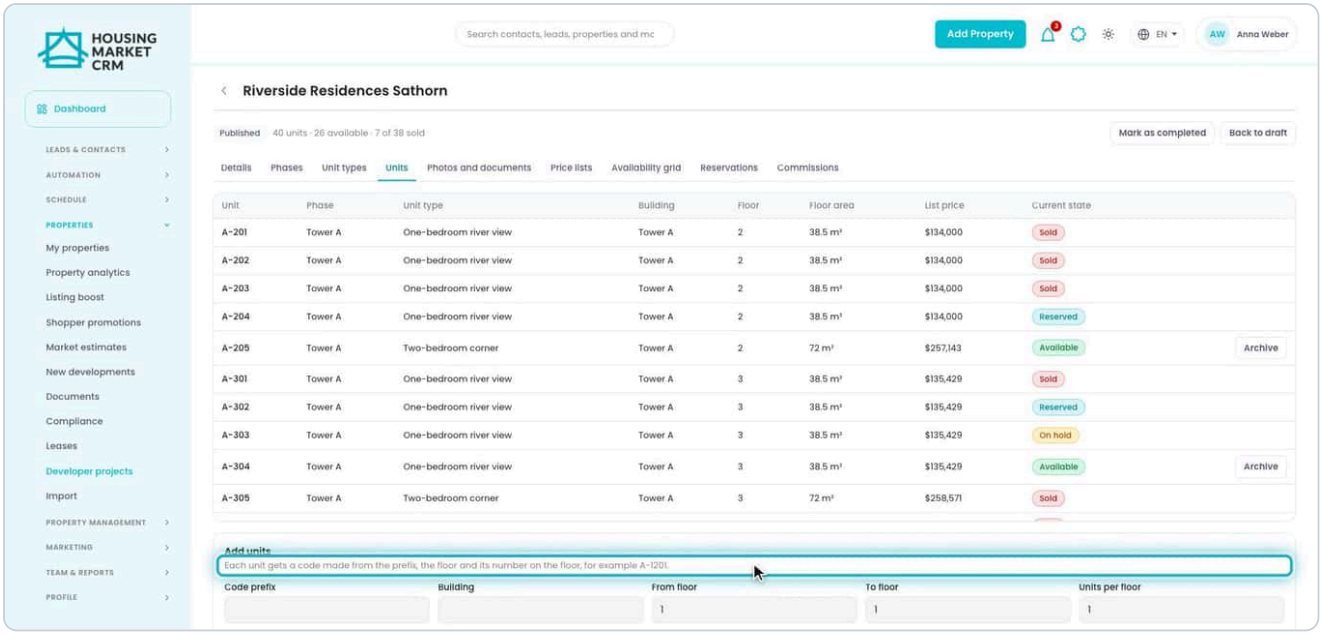


Figure 105.5 · Screen recorded 23 October 2026

6 Add them **all at once** — up to 500.

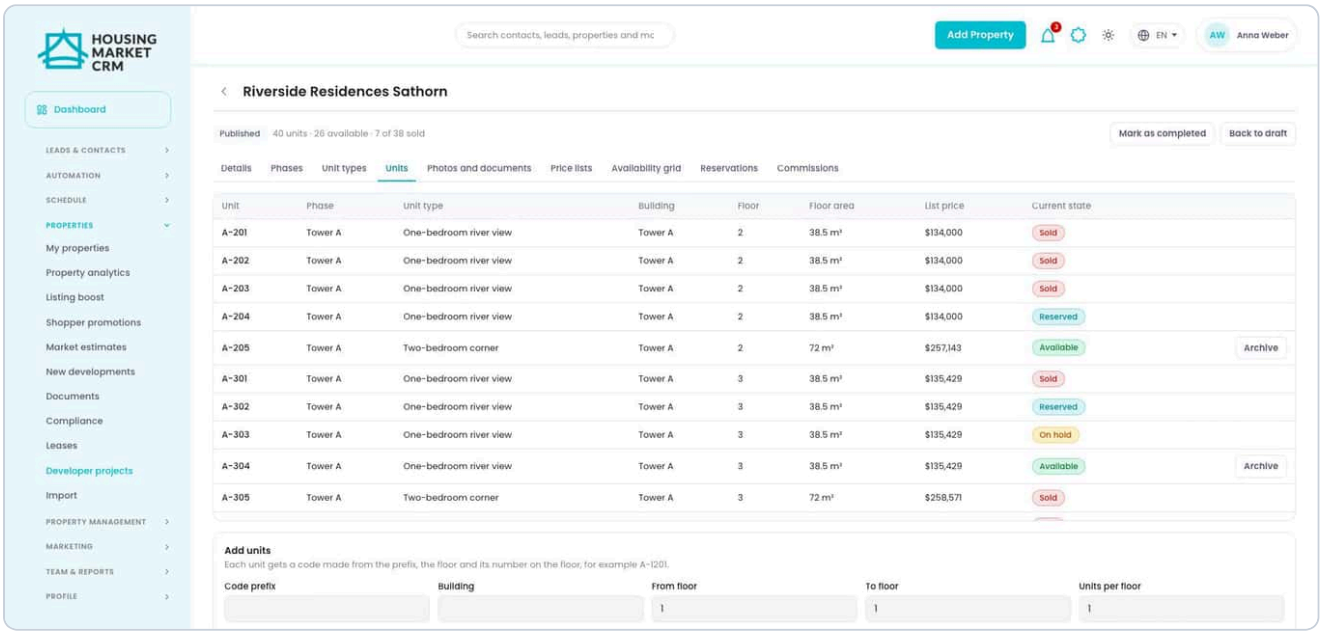


Figure 105.6 · Screen recorded 23 October 2026

7 Open the **Availability grid**.

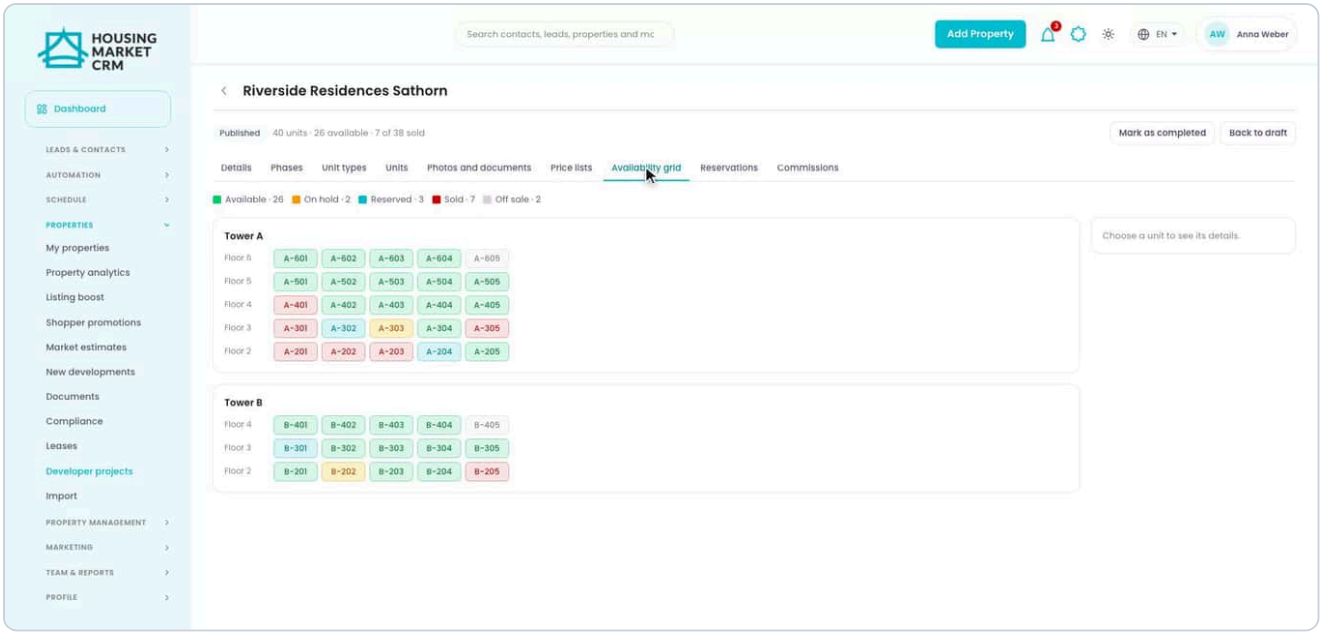


Figure 105.7 · Screen recorded 23 October 2026

8 Available, on hold, reserved, sold, **off sale**.

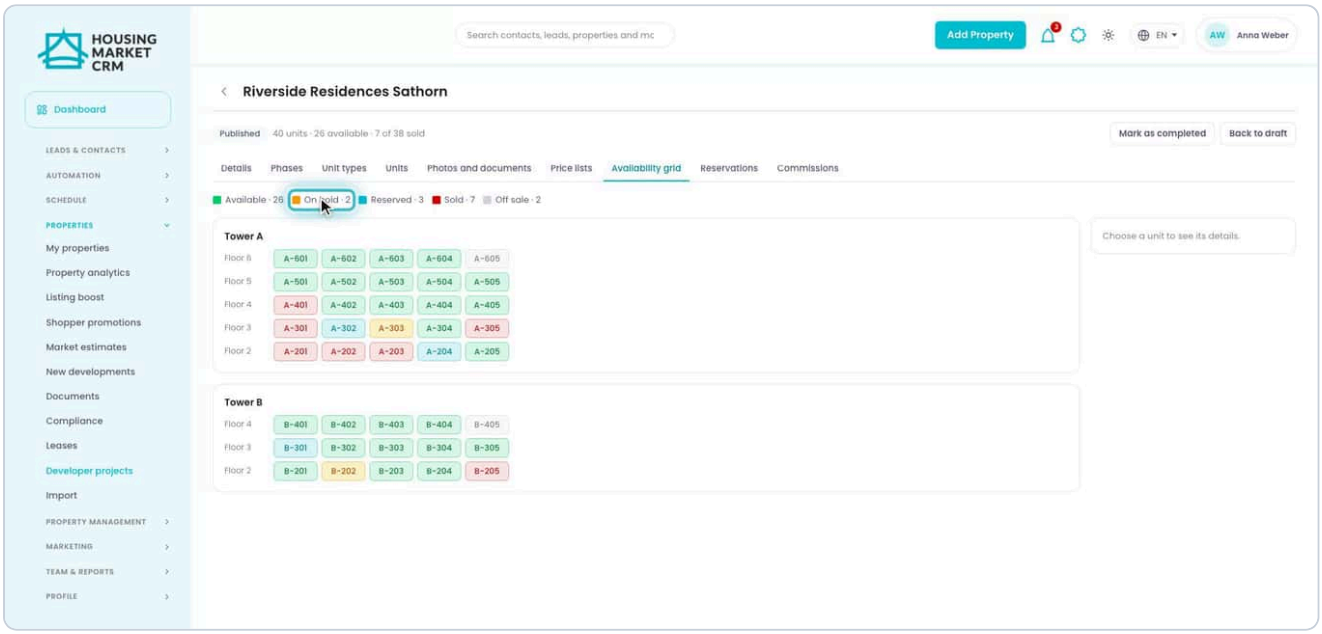


Figure 105.8 · Screen recorded 23 October 2026

9 Choose a unit.

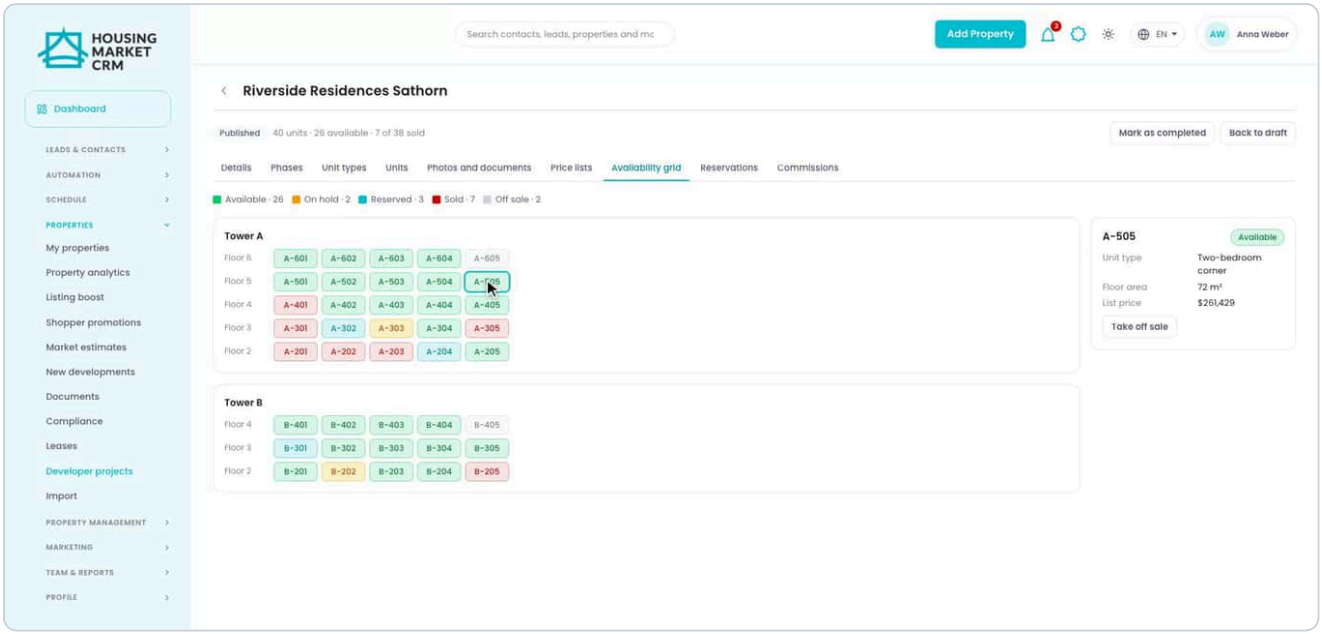


Figure 105.9 · Screen recorded 23 October 2026

10 **Take off sale** — and put it back the same way.

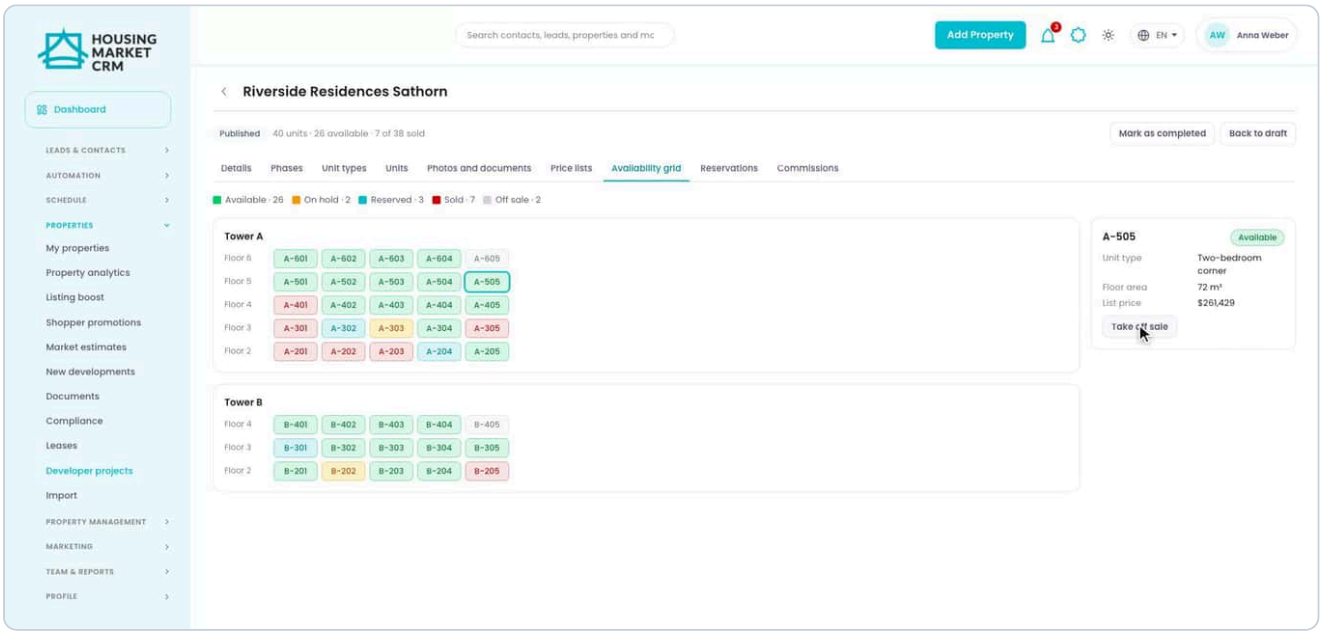


Figure 105.10 · Screen recorded 23 October 2026

106 CHAPTER 106

Publish a price list

Developer plan | For property developers | Watch the video

OVERVIEW

Open the project, add its unit types, create the units in one go from a prefix and a range of floors, and watch them on the Availability grid. A price list sets every unit's price at once and is read-only once published.

These steps are in a Developer Launch project (see "What is the Developer Launch Platform?"). Open Properties, then Developer projects, and open a project.

Phases, unit types and units

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- Under Units, a prefix and a range of floors make every code. You can add them all at once, up to five hundred.

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Housing Market collects no money for any of this: prices and reservations are your record. For how agents reserve a unit, read "How do unit reservations work on the Developer Launch Platform?".

From the Help Center: **How do I add units and a price list to a developer project?**

STEP BY STEP

1 Open **Price lists** in a project.

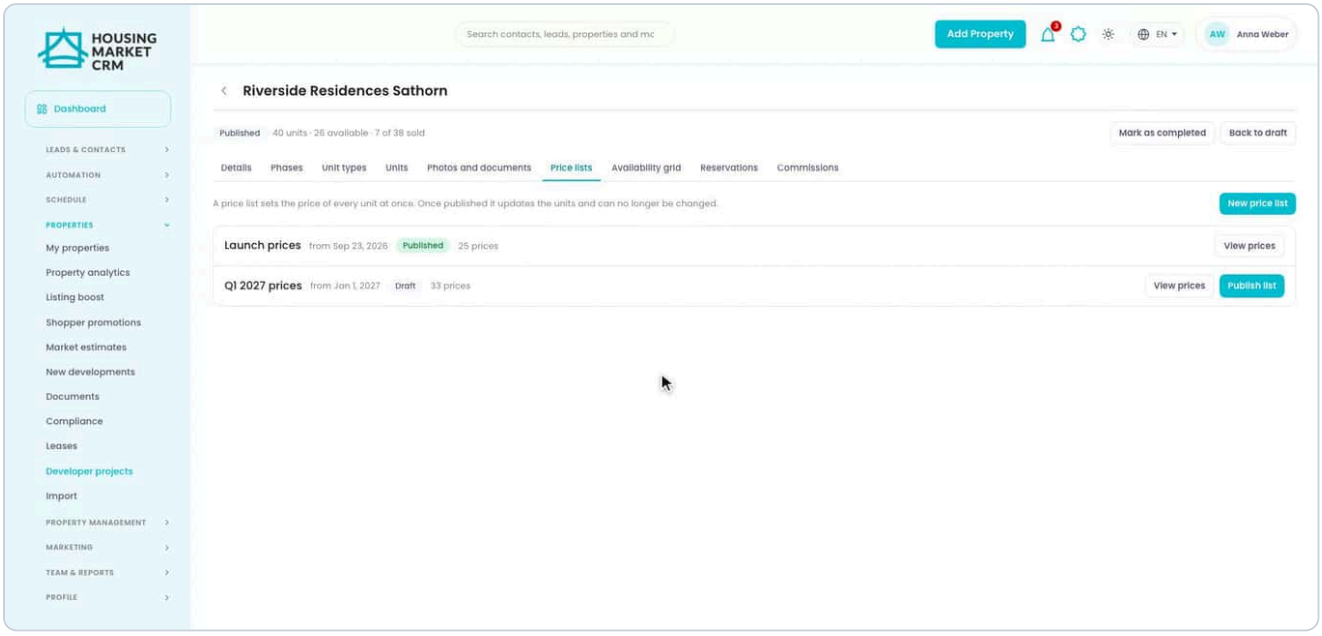


Figure 106.1 · Screen recorded 23 October 2026

2 One list sets **every unit's price** at once.

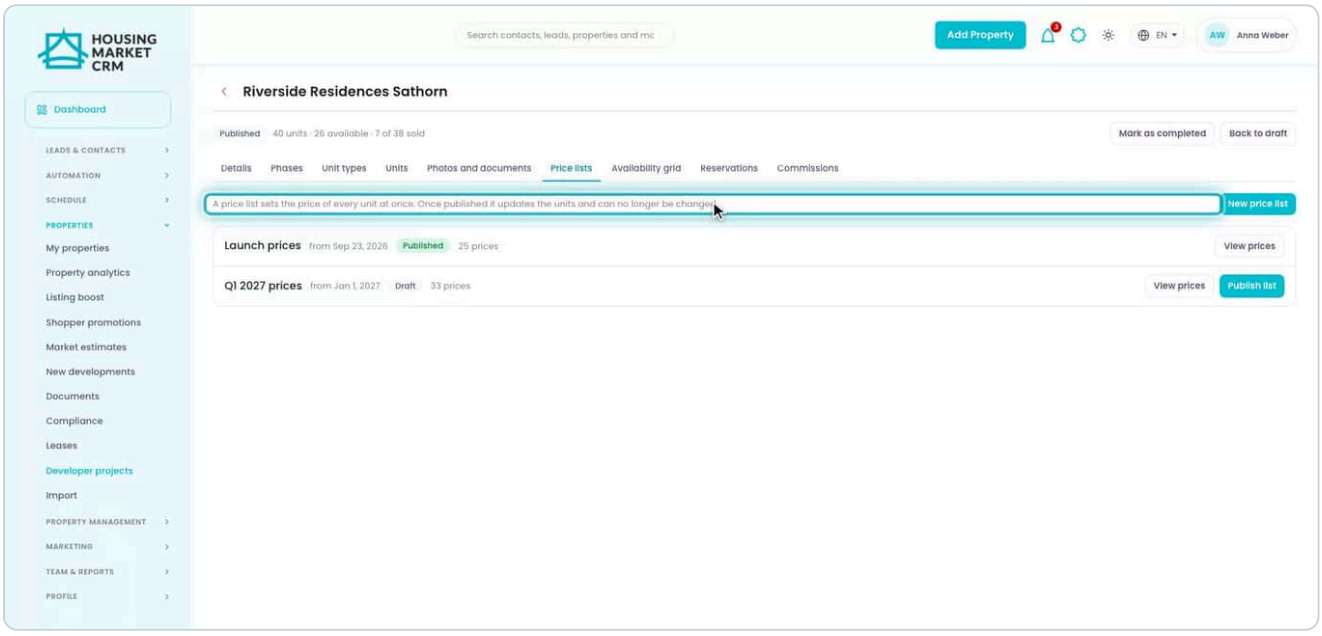


Figure 106.2 · Screen recorded 23 October 2026

3 **New price list**: a name and a date it takes effect.

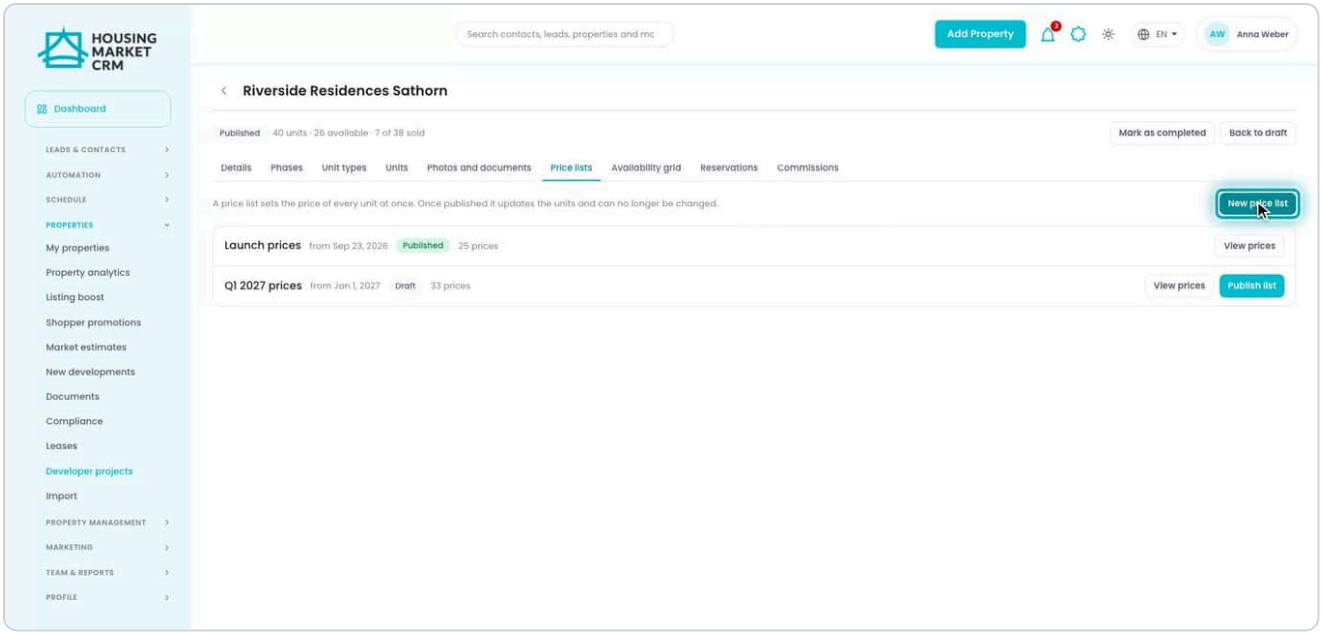


Figure 106.3 · Screen recorded 23 October 2026

4 On a draft, click **View prices** to check it.

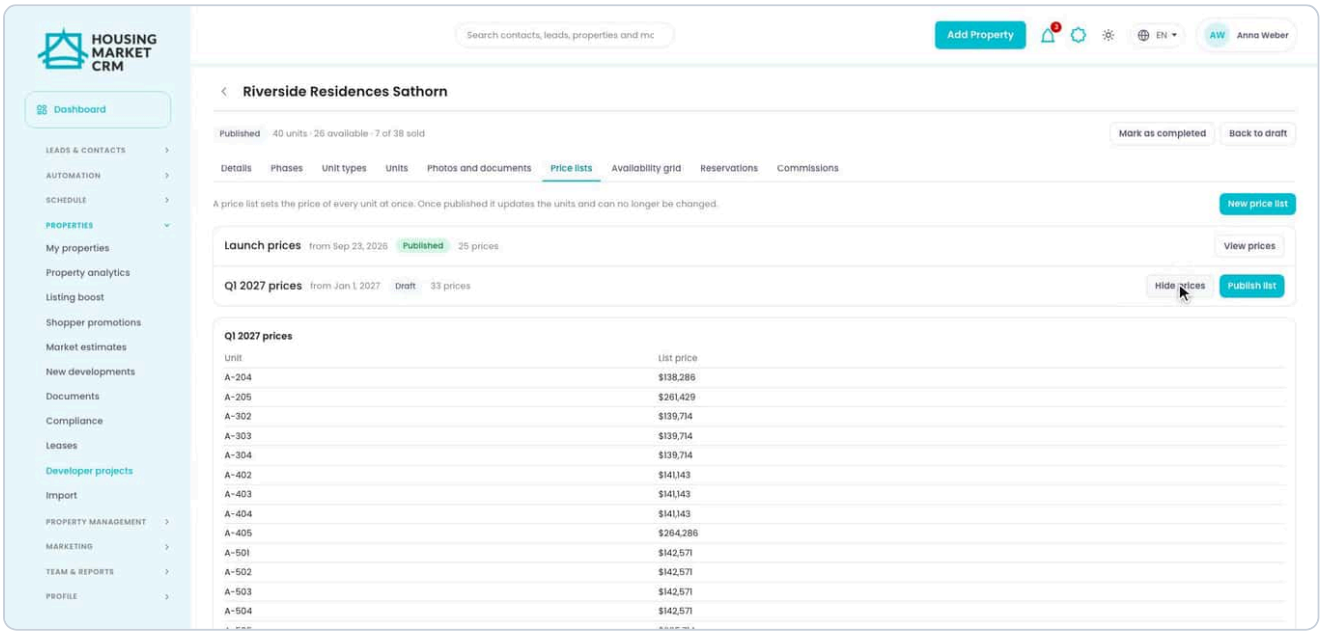


Figure 106.4 · Screen recorded 23 October 2026

5 Then **Publish list.**

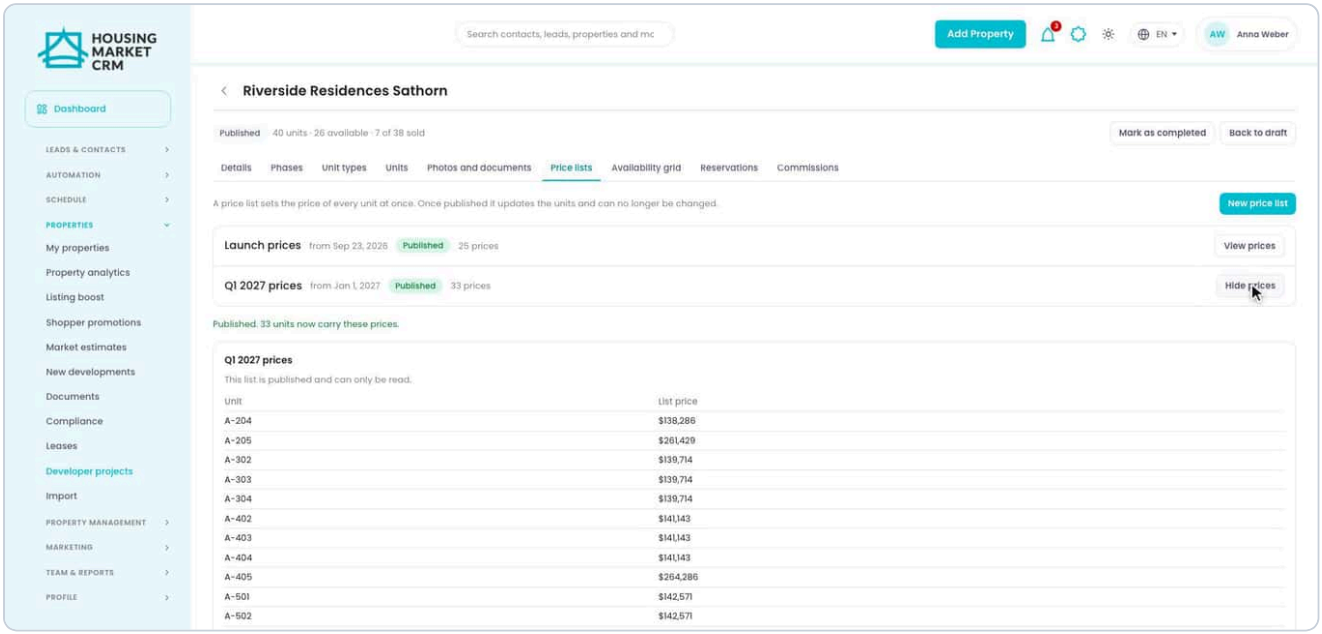


Figure 106.5 · Screen recorded 23 October 2026

6 The units now carry the new prices. The list is **read-only** from here.

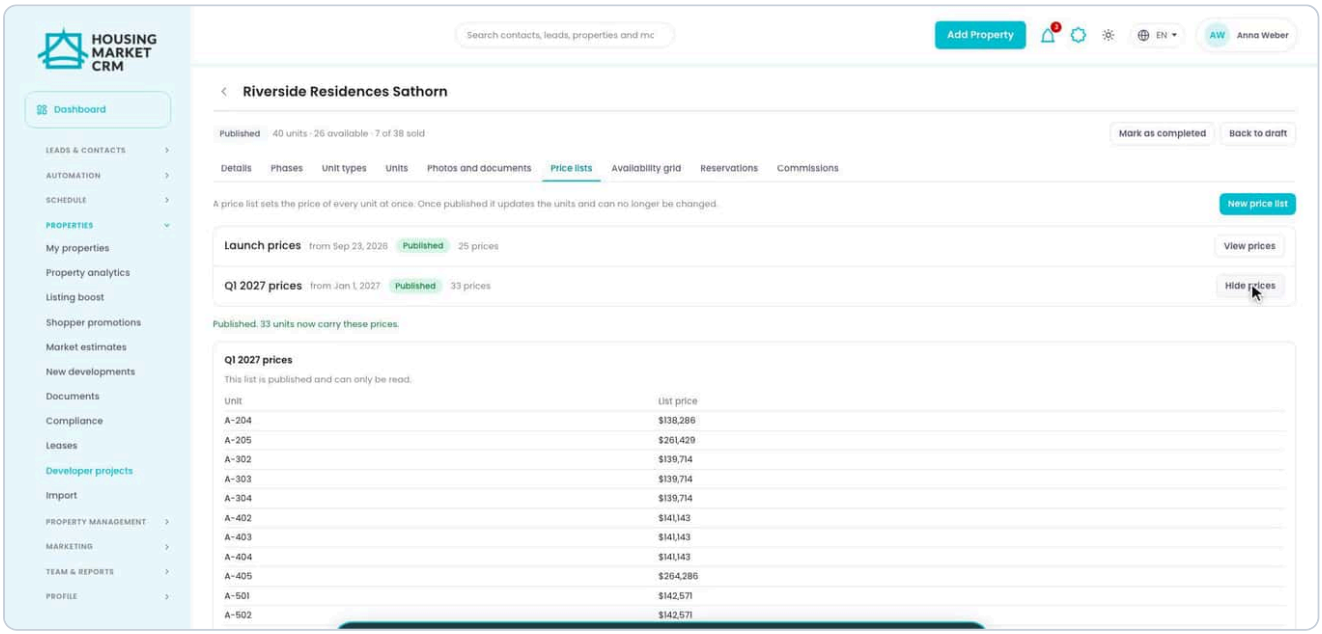


Figure 106.6 · Screen recorded 23 October 2026

107 CHAPTER 107

Developer plans and publishing a project

Developer plan | For property developers | Watch the video

OVERVIEW

An application for property developers to launch off-plan projects: floor plans, unit types, price lists, media and a live grid of available, reserved and sold units, with a project page on the country portal.

Each project has a page on the country portal showing which units are available, and enquiries from it arrive as the developer's leads. The developer's dashboard shows sales progress, units by status, agent performance and the reservation pipeline.

Agents who use Housing Market CRM see developer projects and their available units, can reserve a unit for their buyer and track commission per unit sold.

The Developer Launch Platform is an add-on to Housing Market CRM, bought on any plan, the free one included. Building a project is free. Publishing its page is charged per month by the number of active projects: 149 USD for one, 499 USD for up to five, or 999 USD for unlimited projects. Agents browse projects and reserve units at no charge.

From the Help Center: **What is the Developer Launch Platform?**

STEP BY STEP

1 Open **Developer projects**.

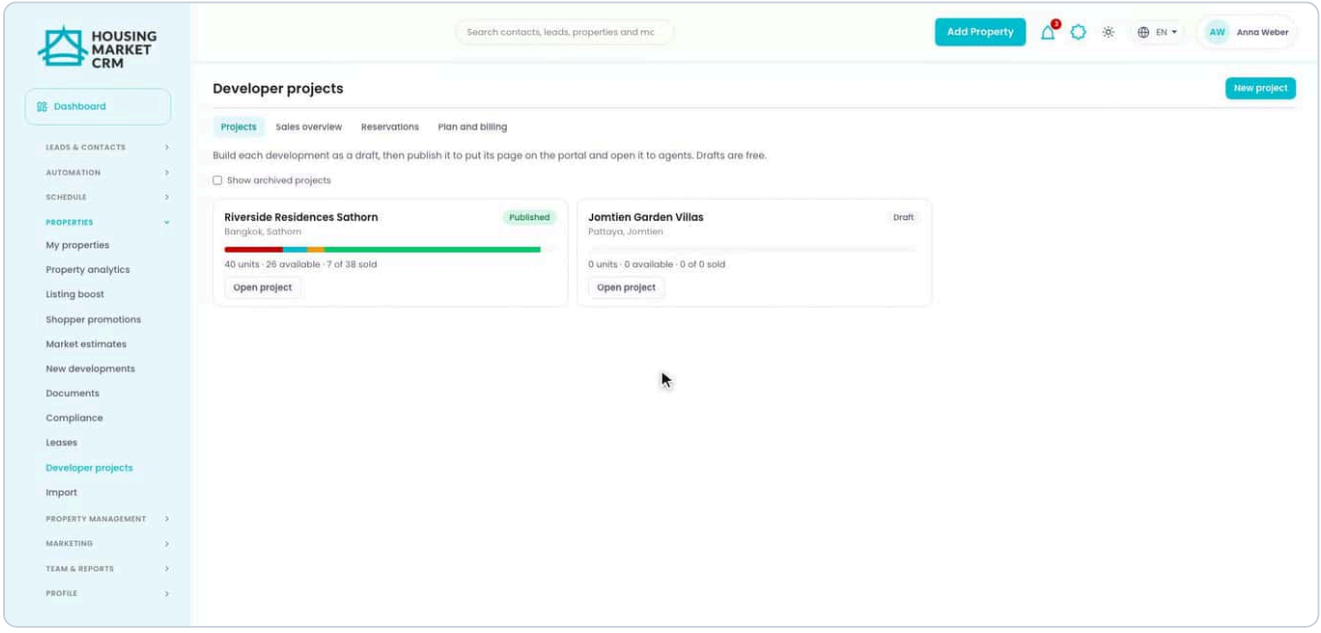


Figure 107.1 · Screen recorded 23 October 2026

2 Open a **draft** project.

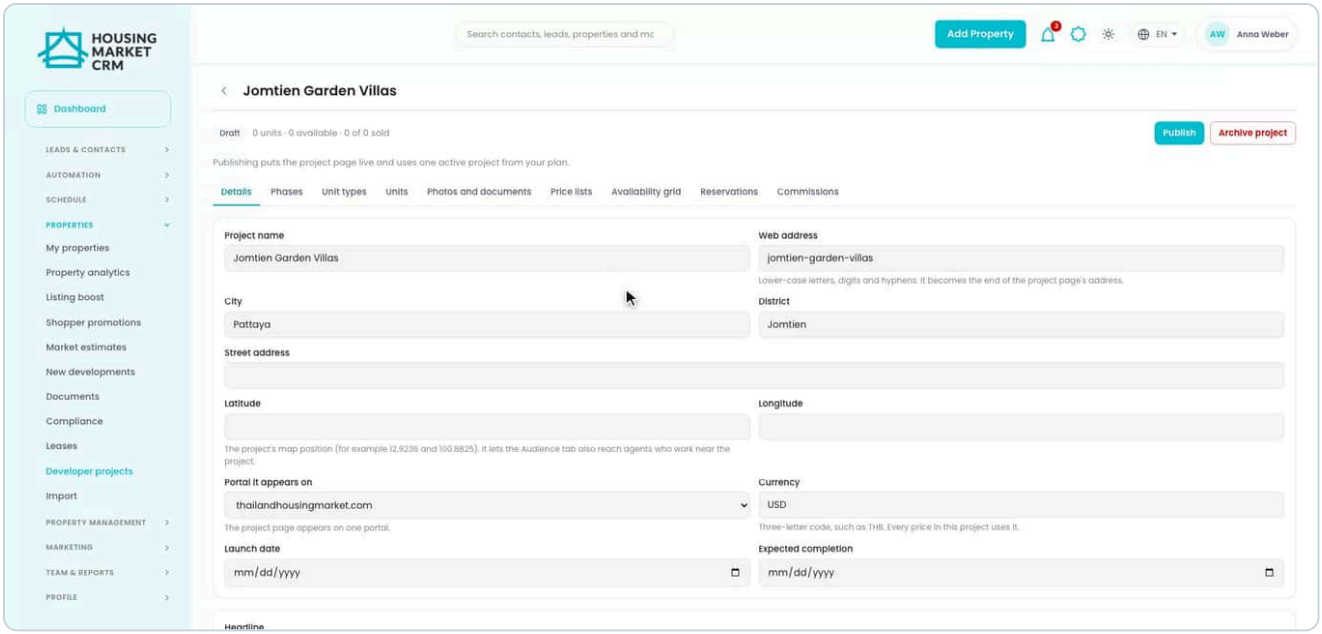


Figure 107.2 · Screen recorded 23 October 2026

3 Publishing puts its page **live** and opens it to agents.

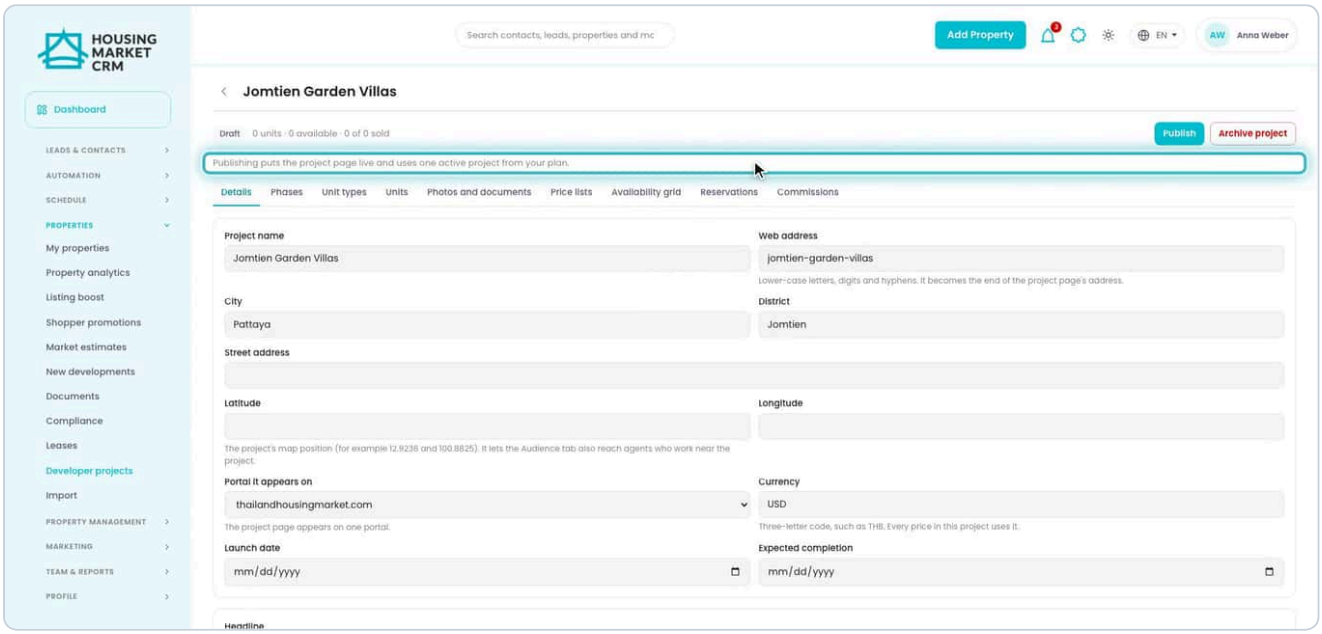


Figure 107.3 · Screen recorded 23 October 2026

4 **Publish** is the one step that uses a slot of your plan.

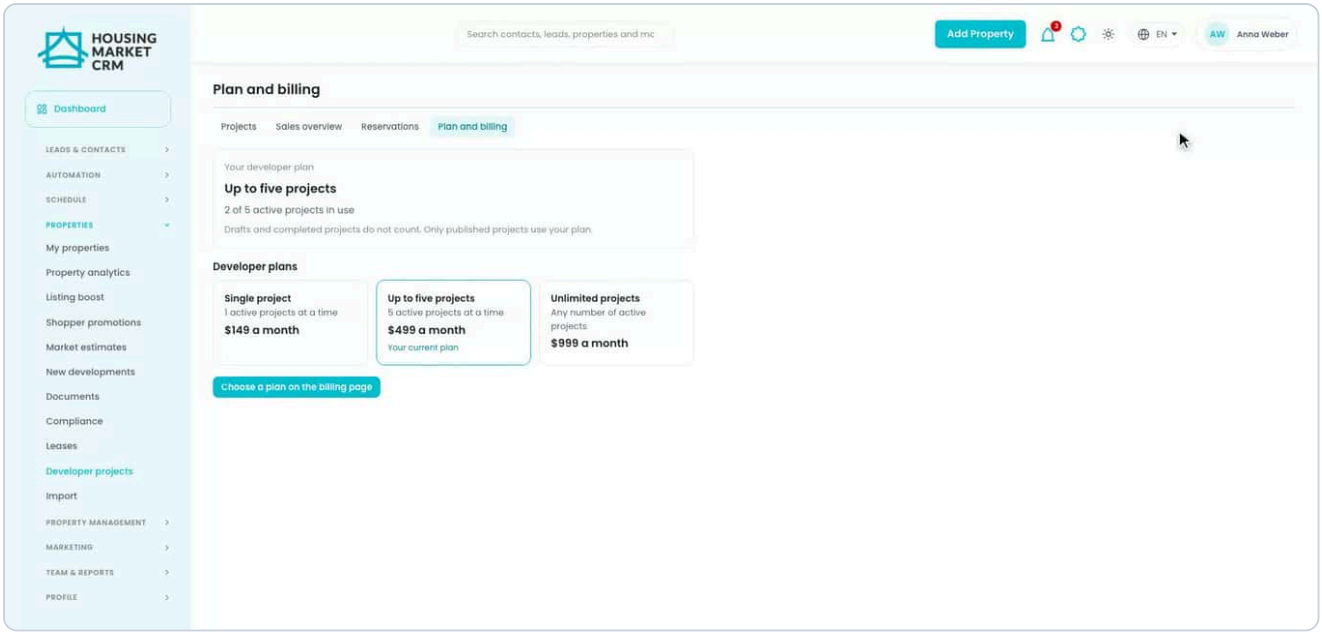


Figure 107.4 · Screen recorded 23 October 2026

5 Open **Plan and billing**.

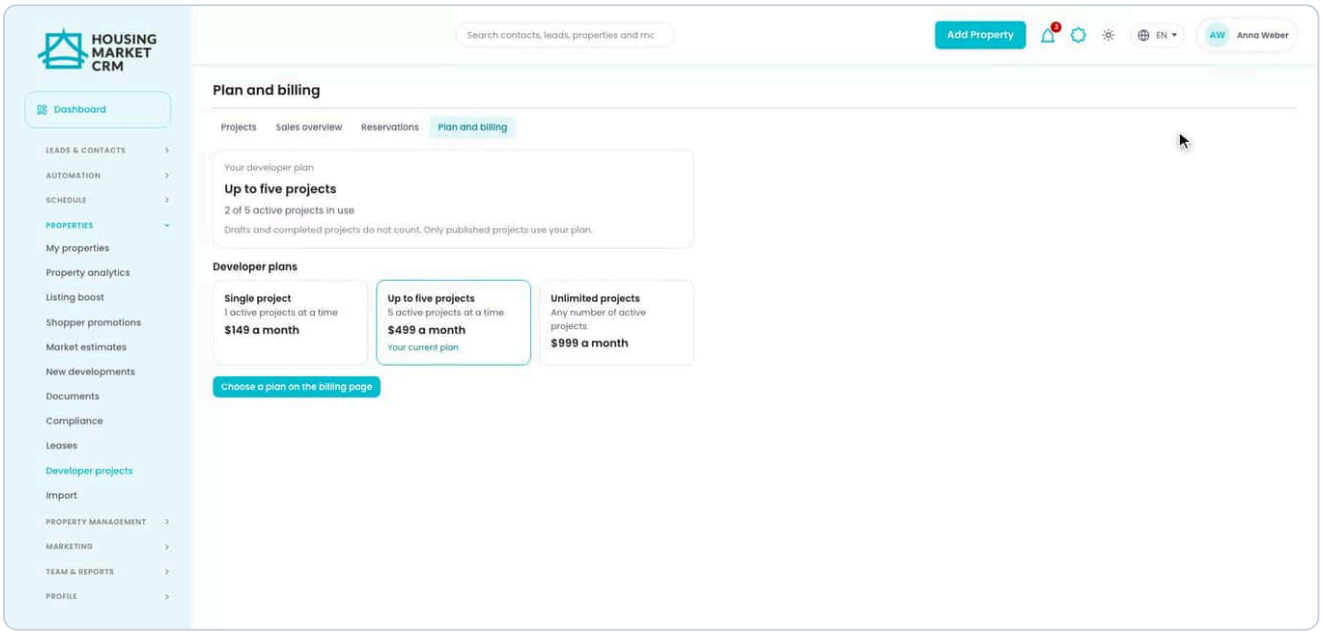


Figure 107.5 · Screen recorded 23 October 2026

6 Only **published** projects count. Drafts are free.

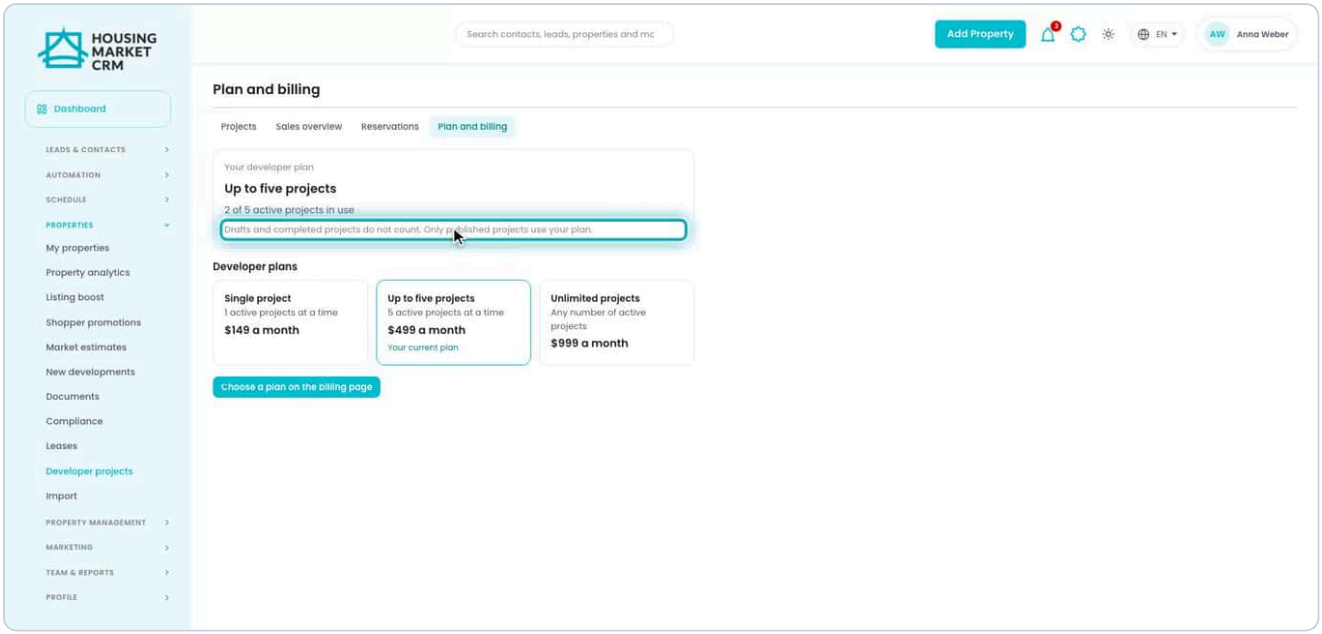


Figure 107.6 · Screen recorded 23 October 2026

7 One, up to five, or **unlimited** projects at a time.

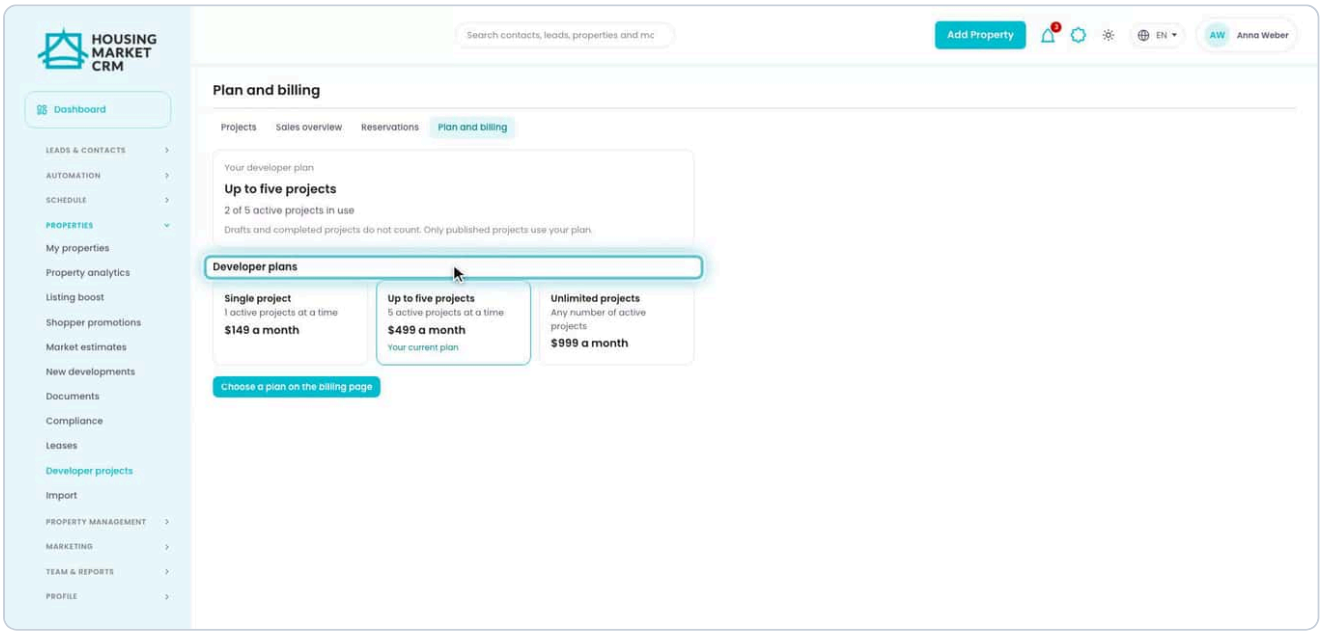


Figure 107.7 · Screen recorded 23 October 2026

8 Plans are bought on the **billing page**.

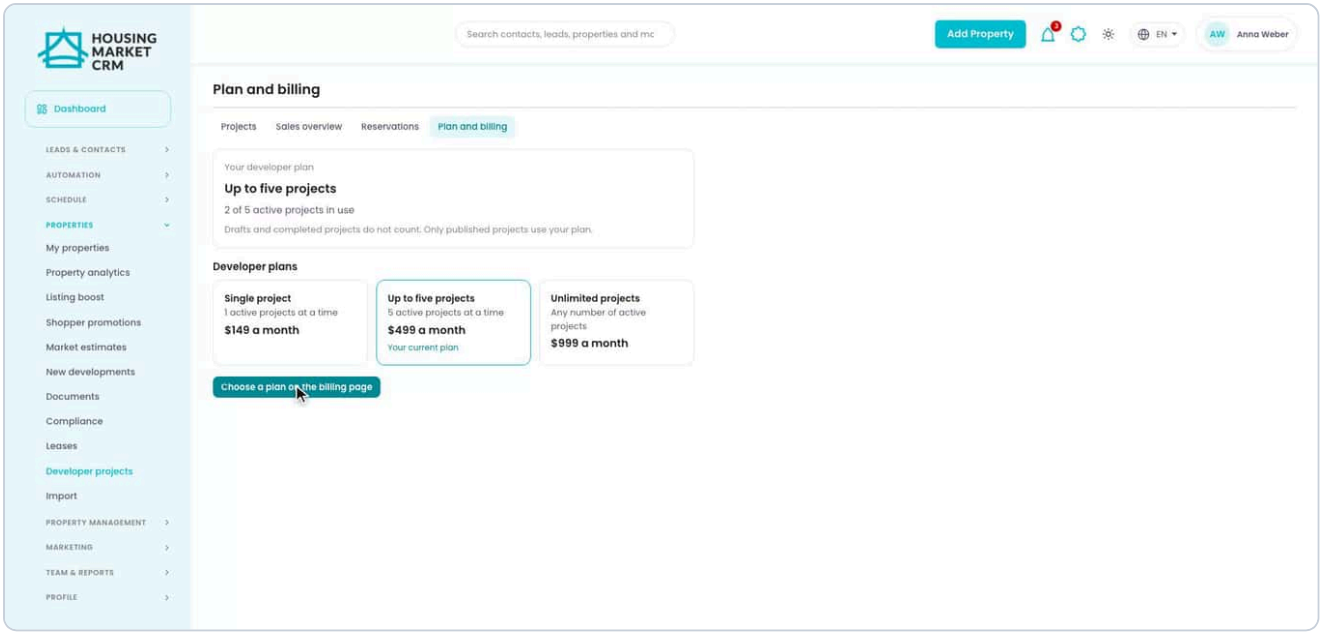


Figure 107.8 · Screen recorded 23 October 2026

RELATED HELP CENTER ARTICLES

How do I upgrade, add users or cancel?	faq.housingmarketgroup.com/faq/how-do-i-upgrade-add-users-or-cancel

108 CHAPTER 108

Reserve a new-development unit as an agent

All plans | For agents | Watch the video

OVERVIEW

An agent reserves a unit online for a buyer and, if the developer allows it, a buyer can ask to reserve a unit from the project page. The unit is held for a limited time while the developer approves the reservation. Deposits are recorded, never collected.

Agents who use Housing Market CRM reserve a unit for their buyer, at no charge on any plan. A buyer can ask to reserve a unit directly from the project page only if the developer has allowed it.

Housing Market Group does not take or hold any payment: a deposit is recorded only so that the developer and the agent can track it.

From the Help Center: **How do unit reservations work on the Developer Launch Platform?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

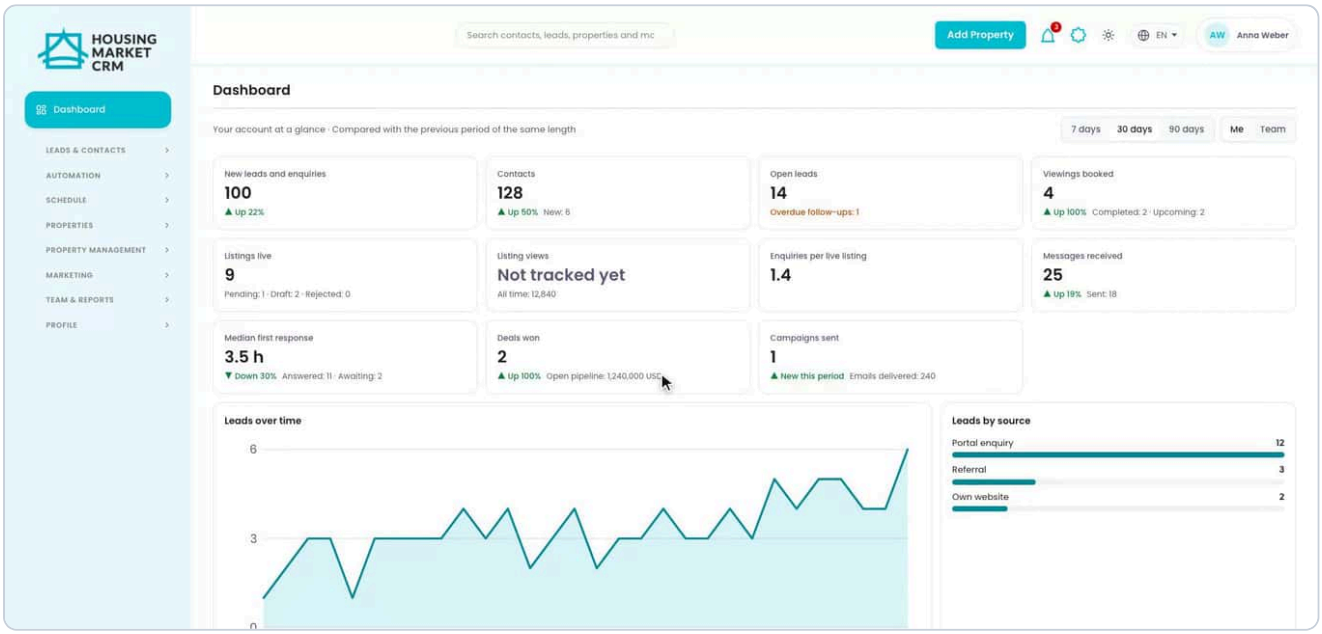


Figure 108.1 · Screen recorded 23 October 2026

2 Open **Properties** in the left menu.

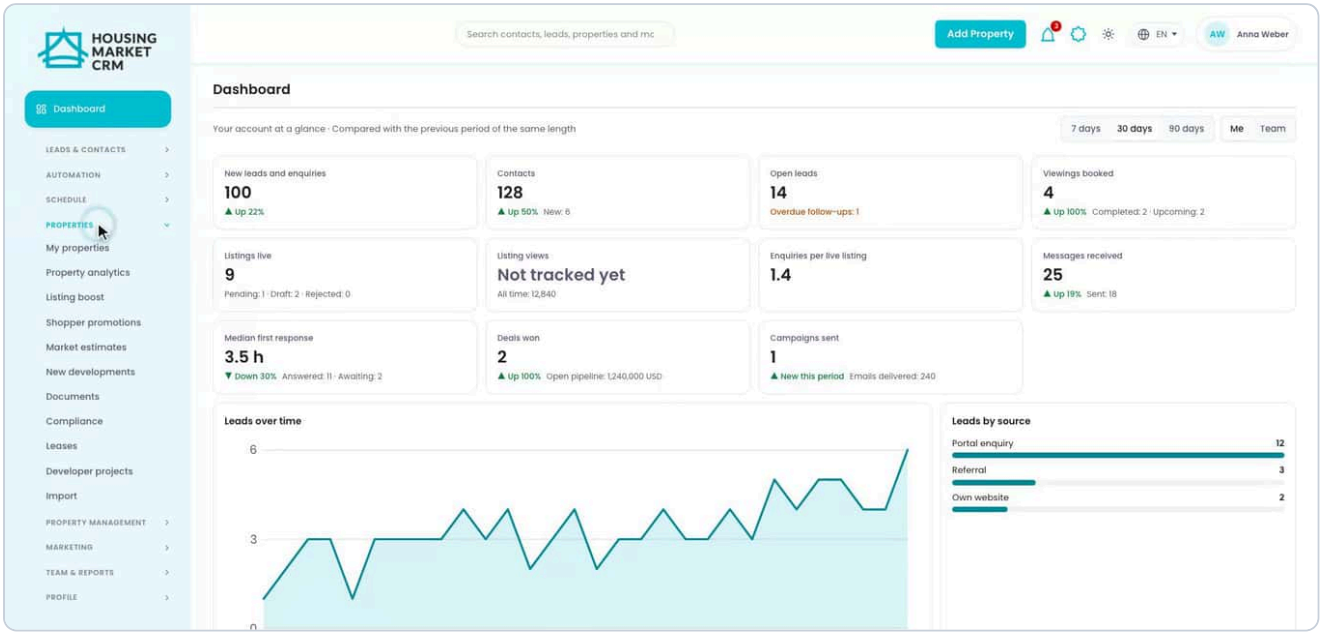


Figure 108.2 · Screen recorded 23 October 2026

3 Click **New developments** in the left menu.

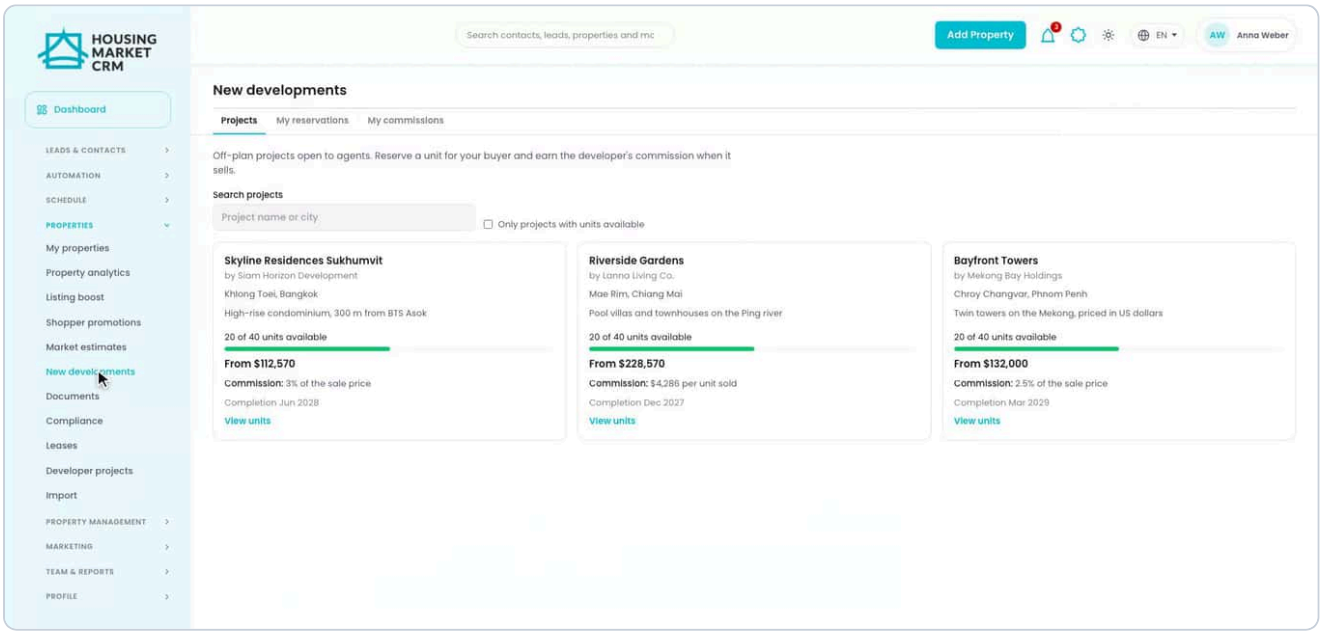


Figure 108.3 · Screen recorded 23 October 2026

4 Each project shows its **commission** and what is still available.

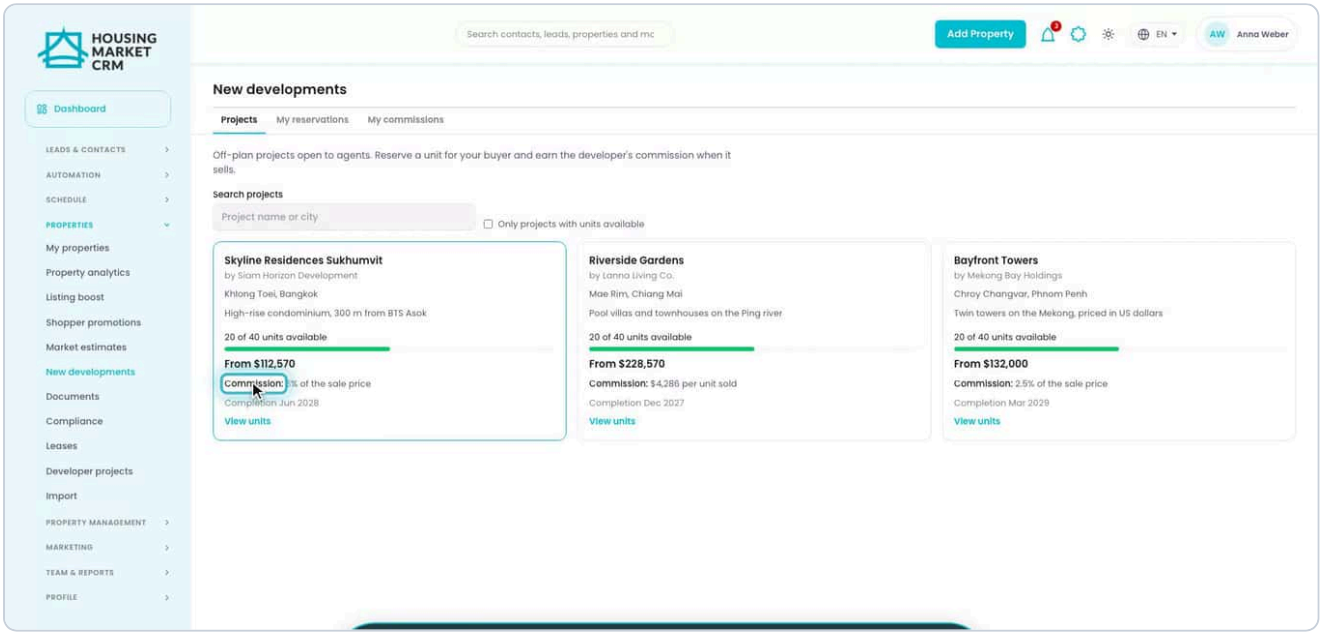


Figure 108.4 · Screen recorded 23 October 2026

5 Click **View units**.

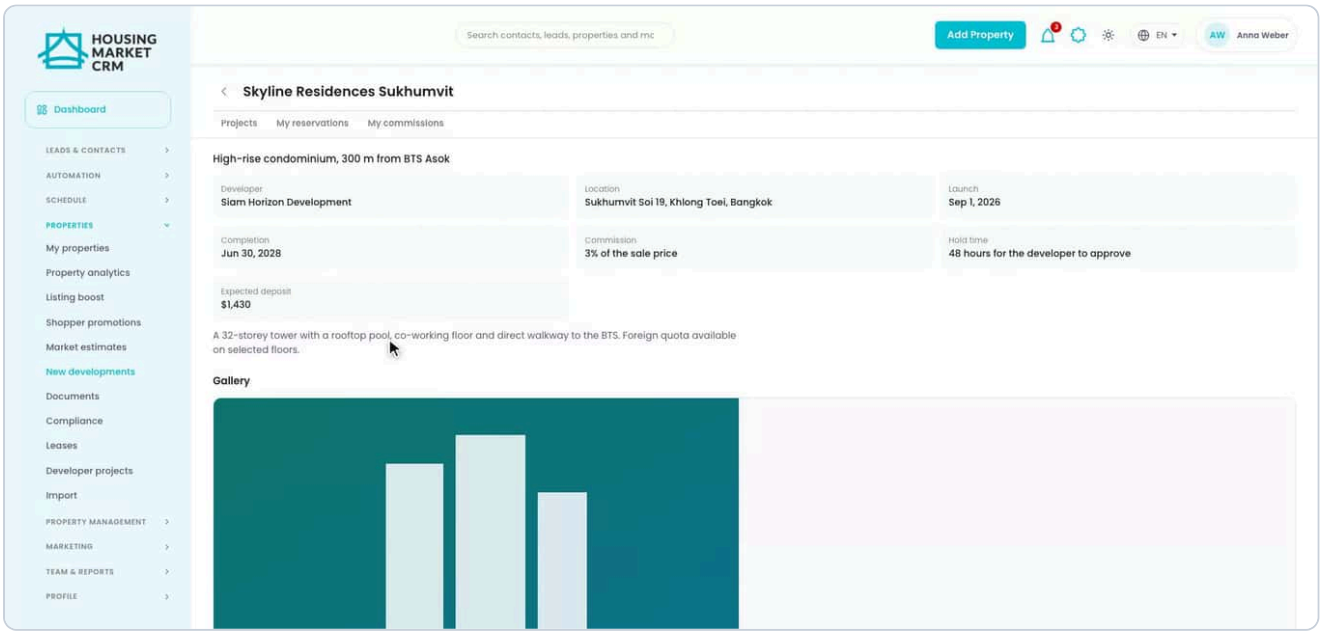


Figure 108.5 · Screen recorded 23 October 2026

6 Availability updates **every minute**.

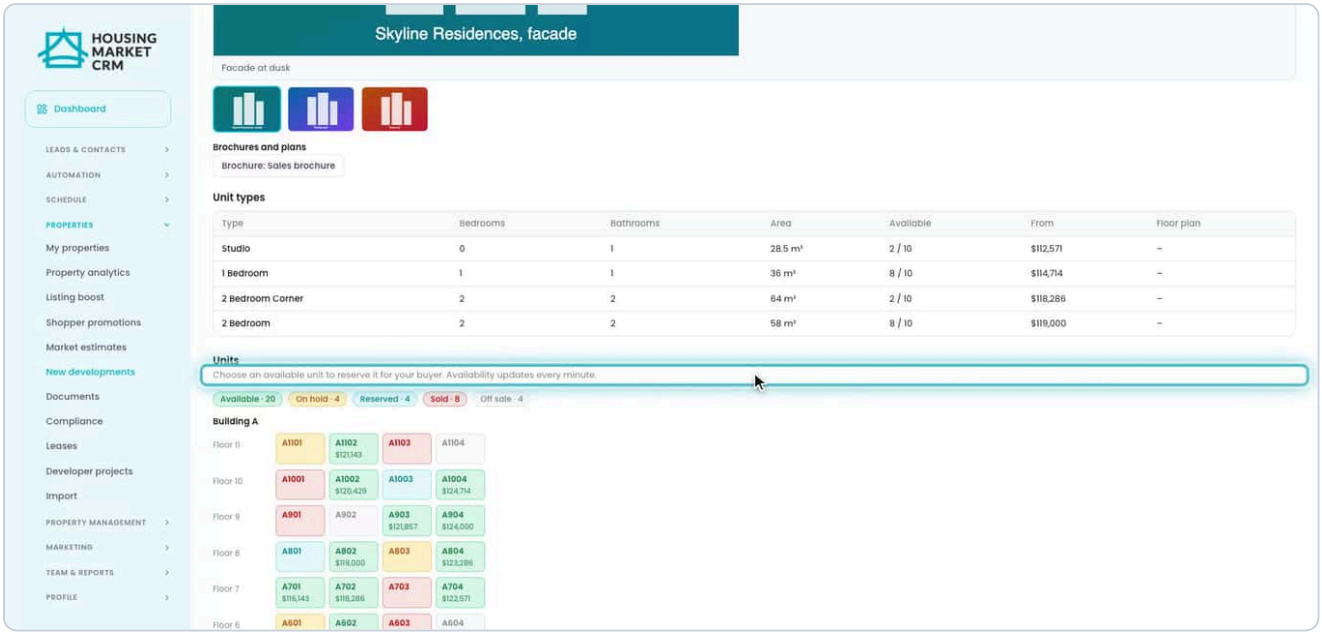


Figure 108.6 · Screen recorded 23 October 2026

7 Choose an **available** unit.

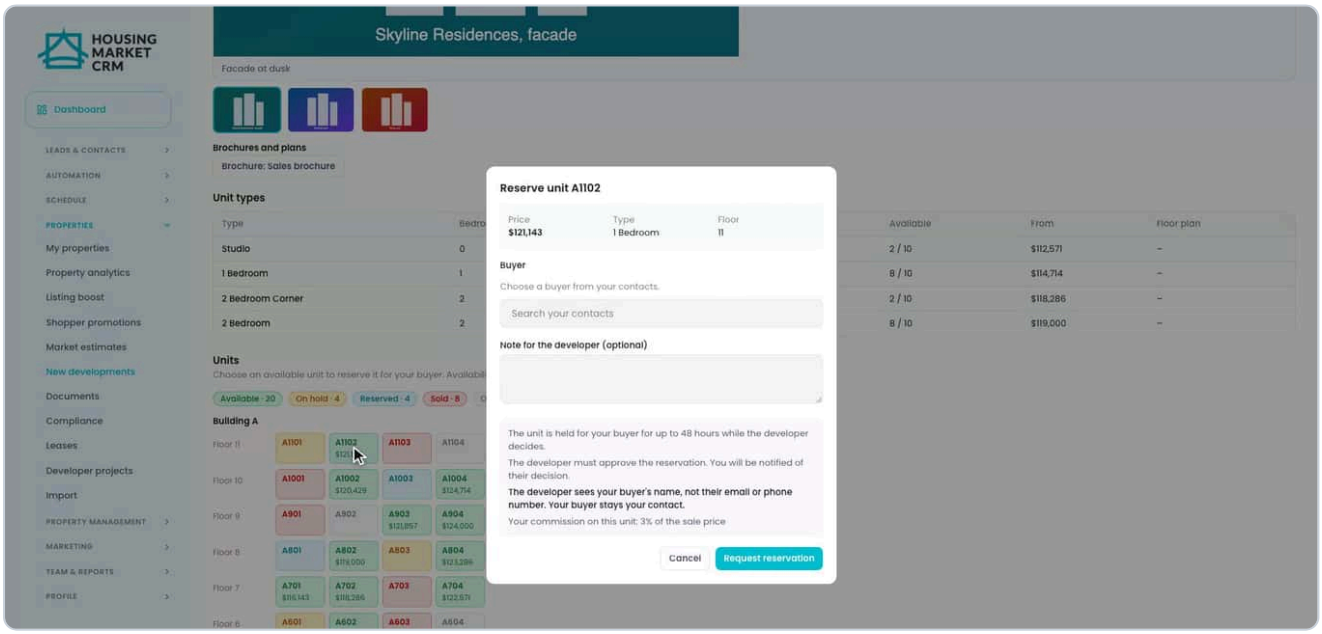


Figure 108.7 · Screen recorded 23 October 2026

8 The **developer approves** it. Until then it is a hold.

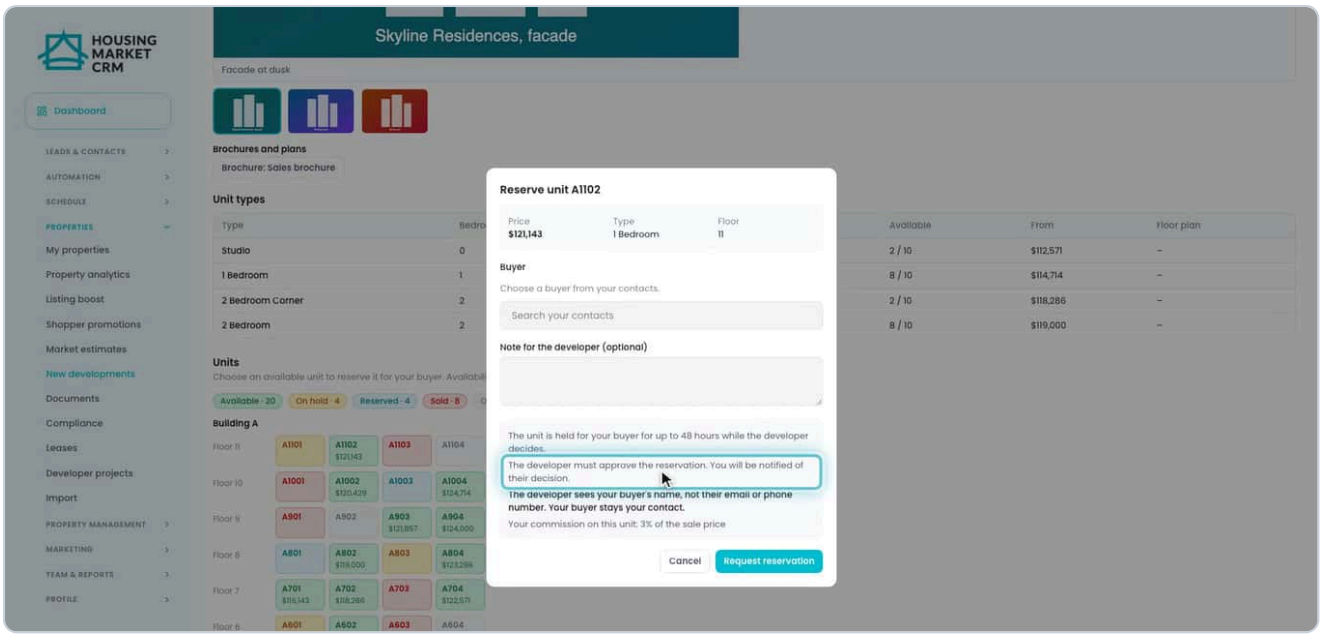


Figure 108.8 · Screen recorded 23 October 2026

9 They see your buyer's **name** — not their email or phone.

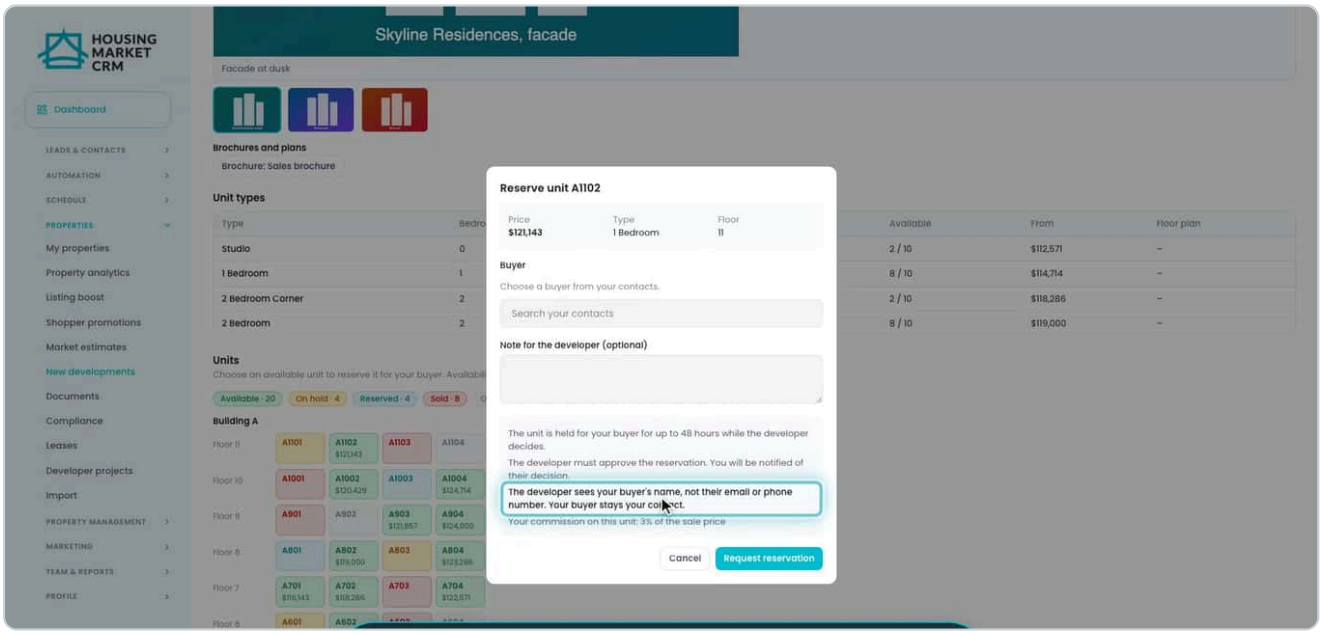


Figure 108.9 · Screen recorded 23 October 2026

10 Choose your buyer, then **Request reservation**.

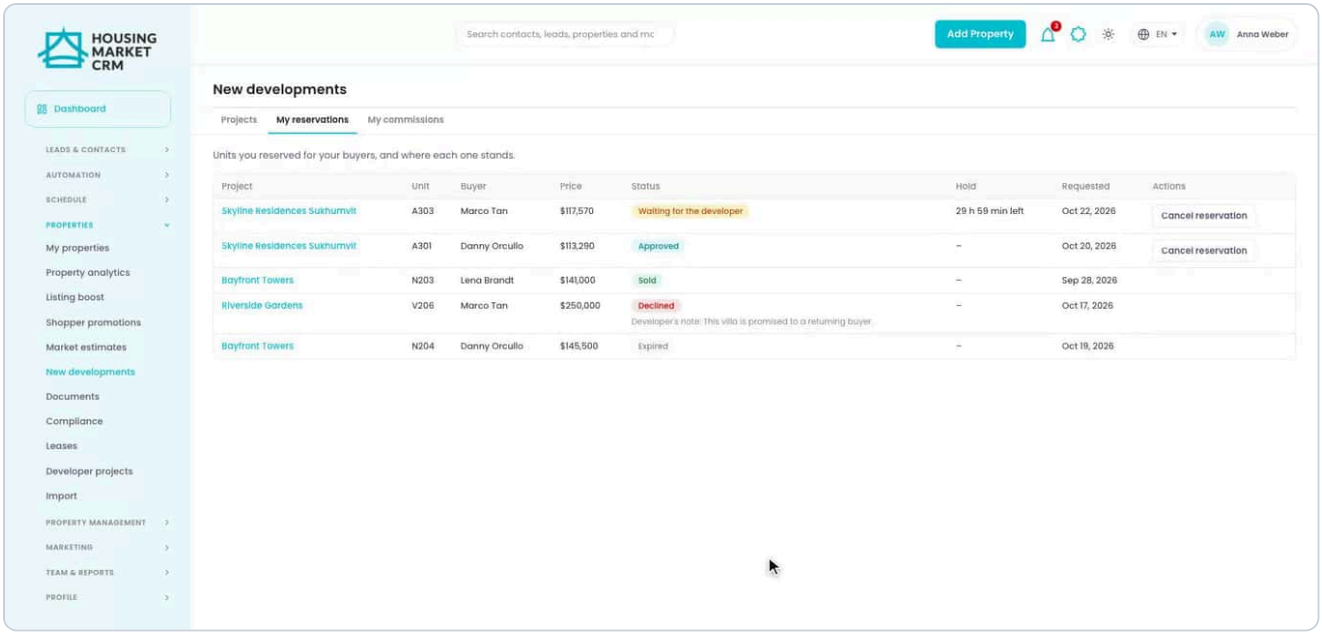


Figure 108.10 · Screen recorded 23 October 2026

11 Open **My reservations**.

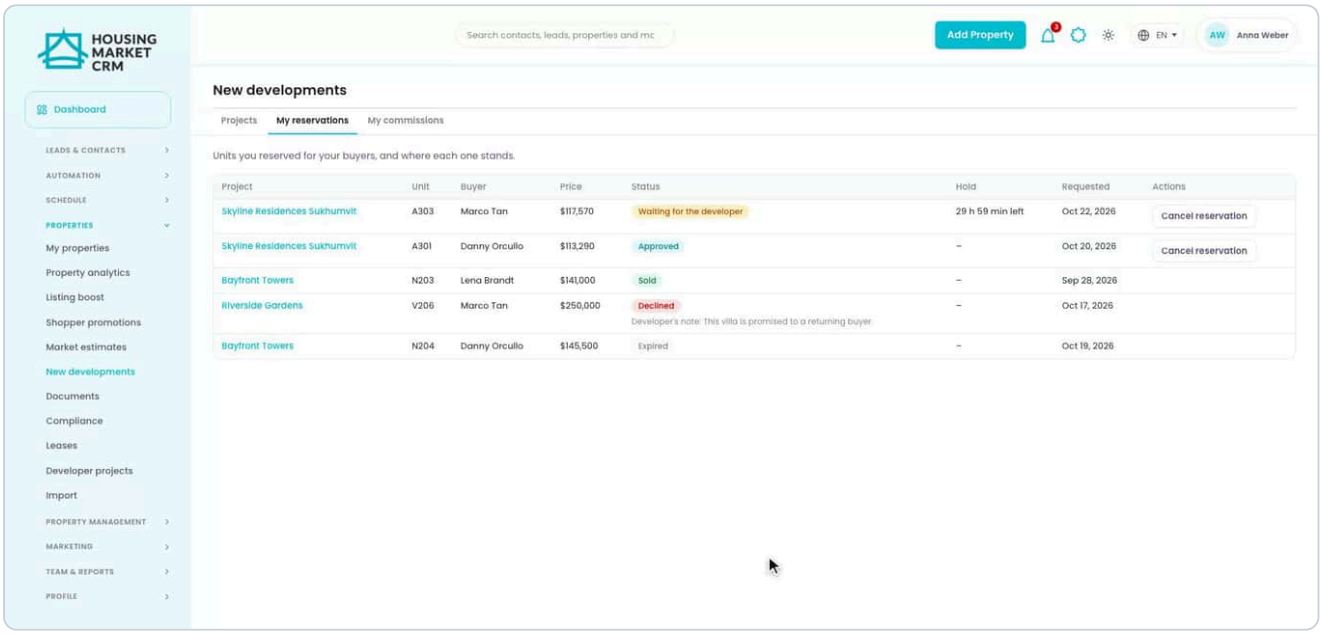


Figure 108.11 · Screen recorded 23 October 2026

12 The **countdown** shows how long the developer has left.

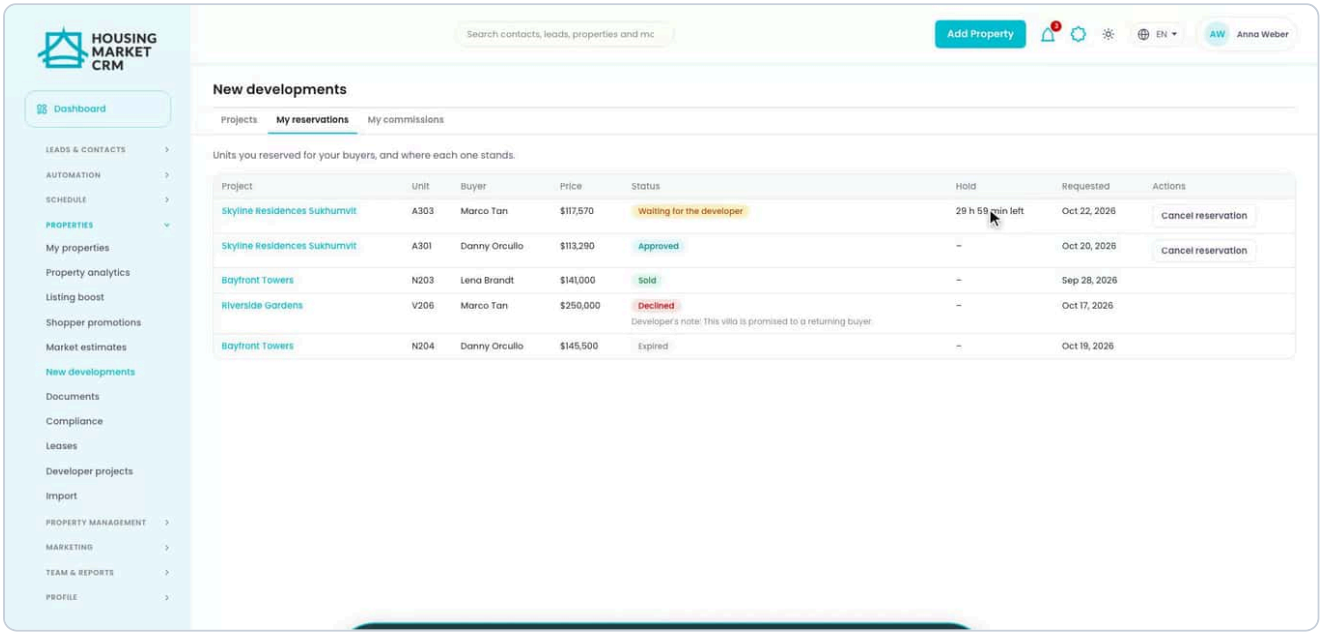


Figure 108.12 · Screen recorded 23 October 2026

109 CHAPTER 109

Approve reservations and track commissions

Developer plan | For property developers | Watch the video

OVERVIEW

An agent reserves a unit online for a buyer and, if the developer allows it, a buyer can ask to reserve a unit from the project page. The unit is held for a limited time while the developer approves the reservation. Deposits are recorded, never collected.

Agents who use Housing Market CRM reserve a unit for their buyer, at no charge on any plan. A buyer can ask to reserve a unit directly from the project page only if the developer has allowed it.

Housing Market Group does not take or hold any payment: a deposit is recorded only so that the developer and the agent can track it.

From the Help Center: **How do unit reservations work on the Developer Launch Platform?**

STEP BY STEP

1 Open **Reservations** in a project.

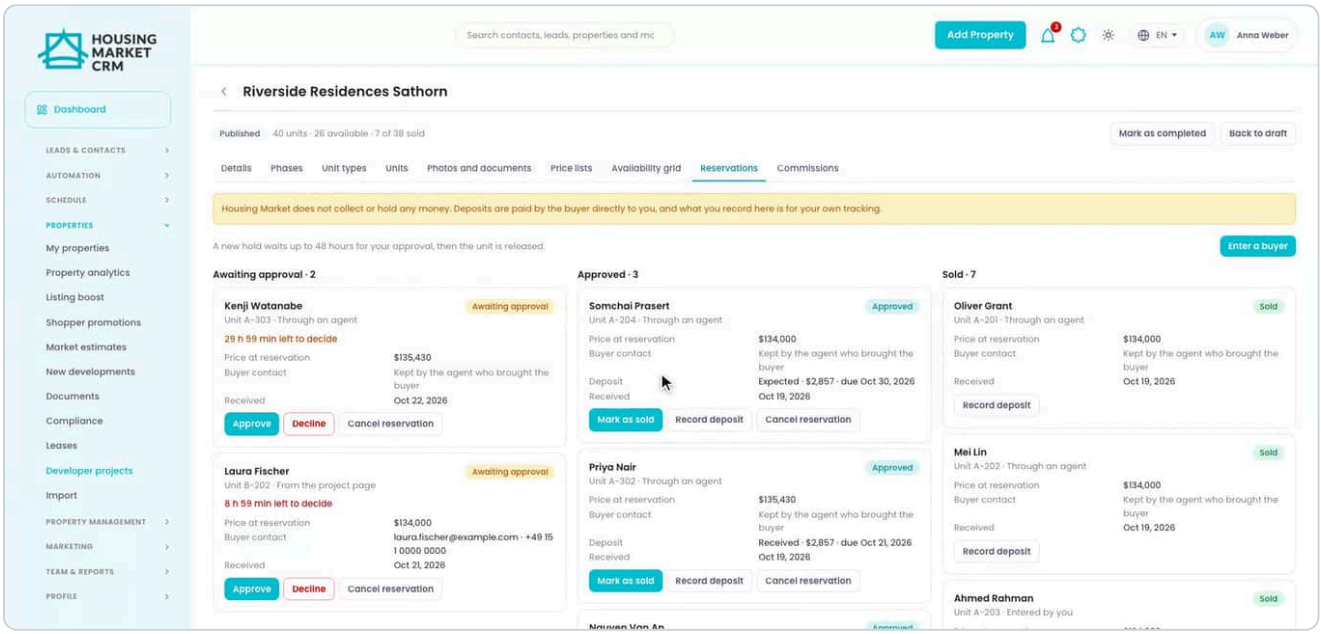


Figure 109.1 · Screen recorded 23 October 2026

2 Housing Market **collects no money**. This is your record.

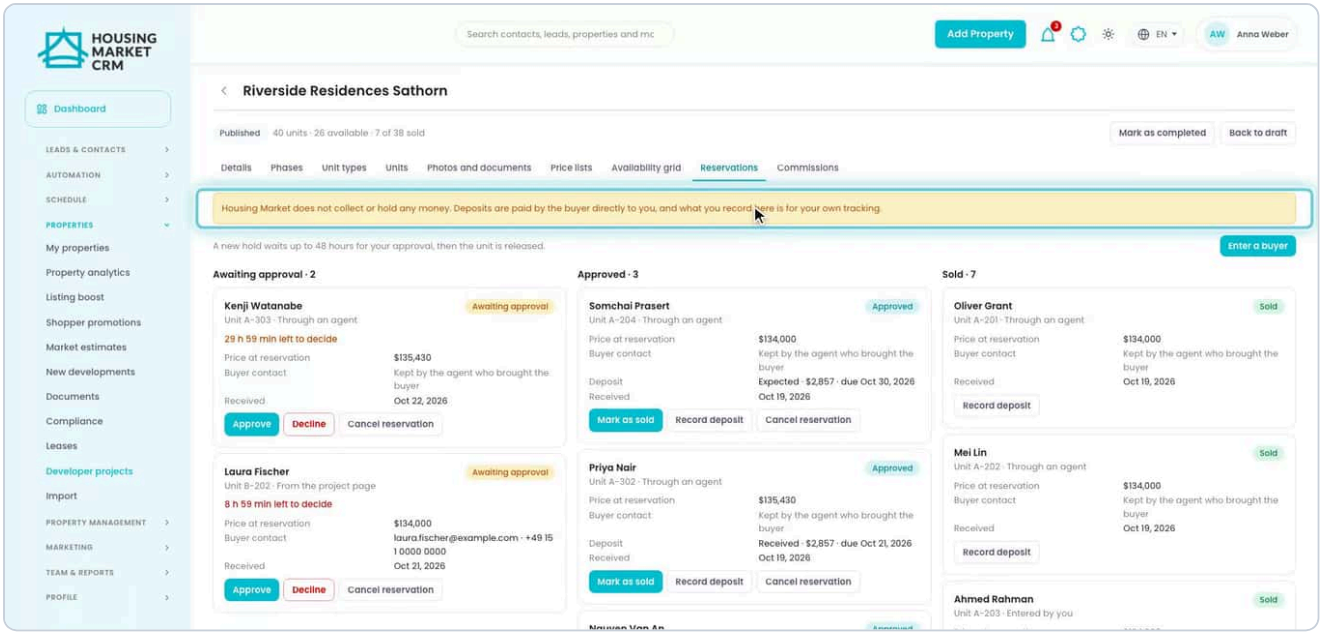


Figure 109.2 · Screen recorded 23 October 2026

3 The **timer**: decide before it runs out.

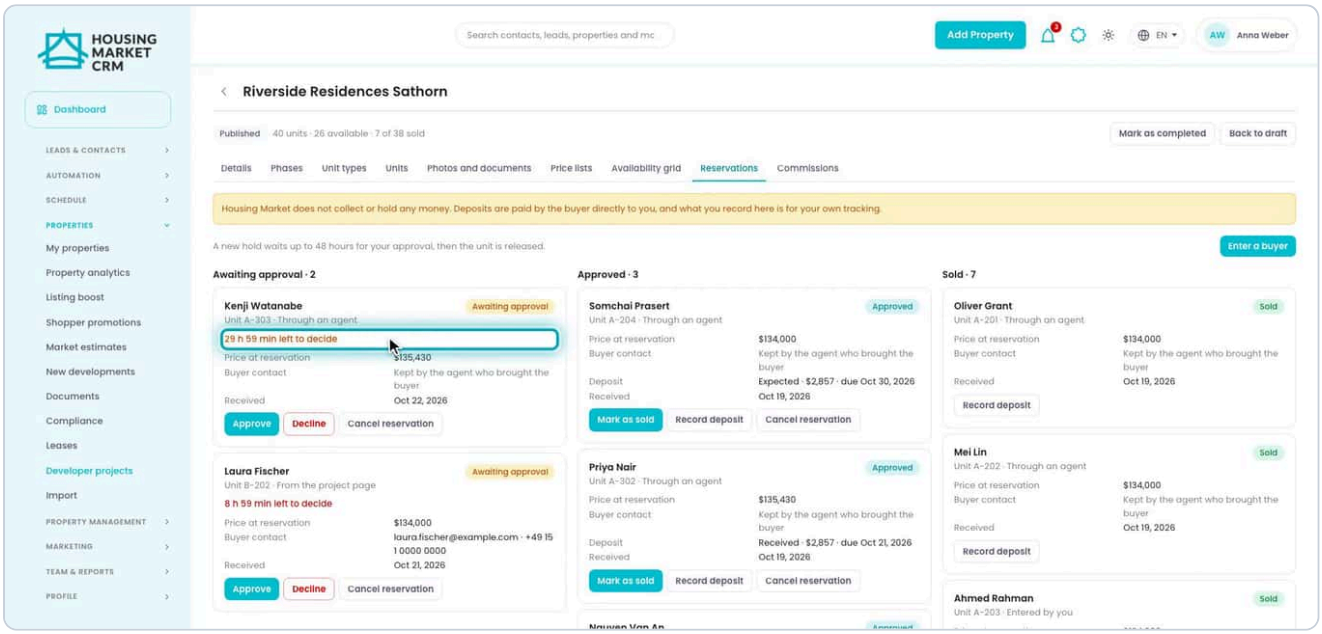


Figure 109.3 · Screen recorded 23 October 2026

4 Click **Approve**.

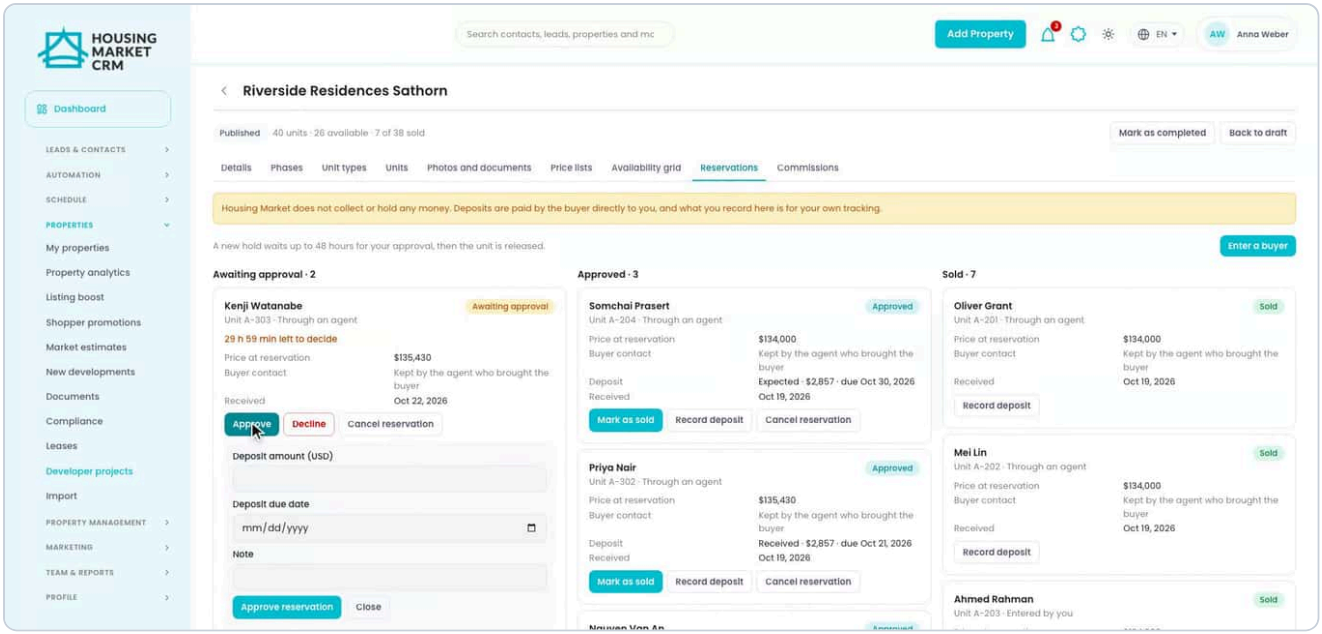


Figure 109.4 · Screen recorded 23 October 2026

5 Confirm with **Approve reservation**.

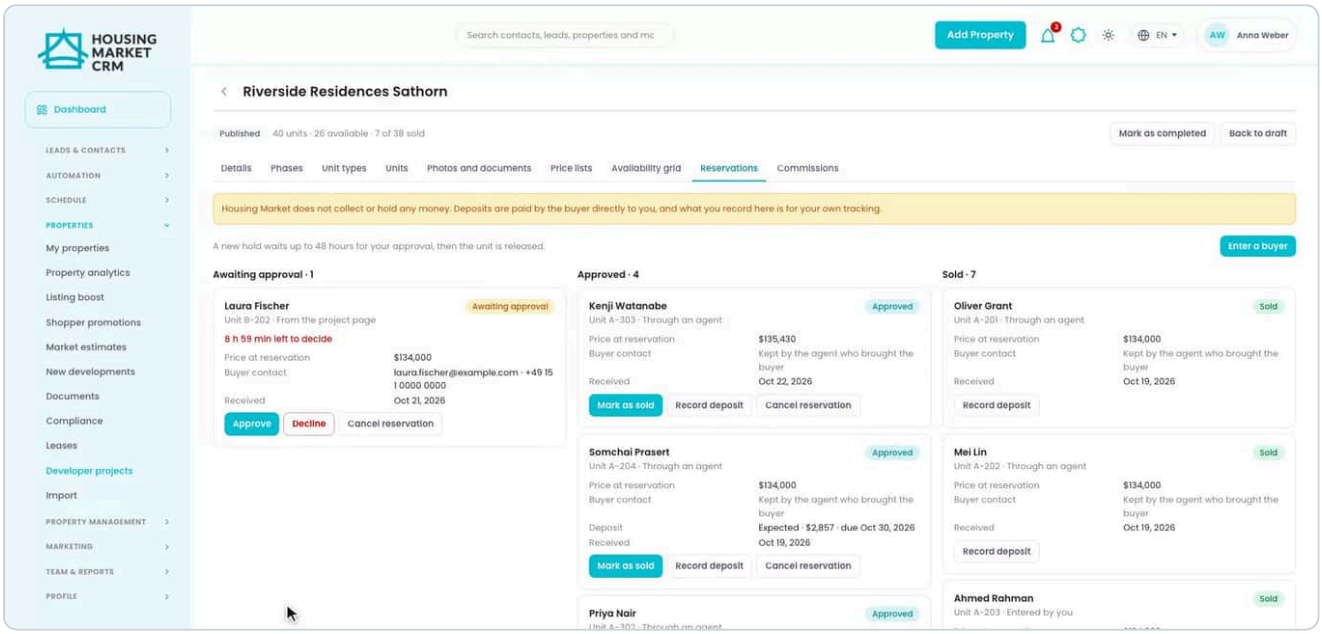


Figure 109.5 · Screen recorded 23 October 2026

6 **Record deposit** when the buyer pays you.

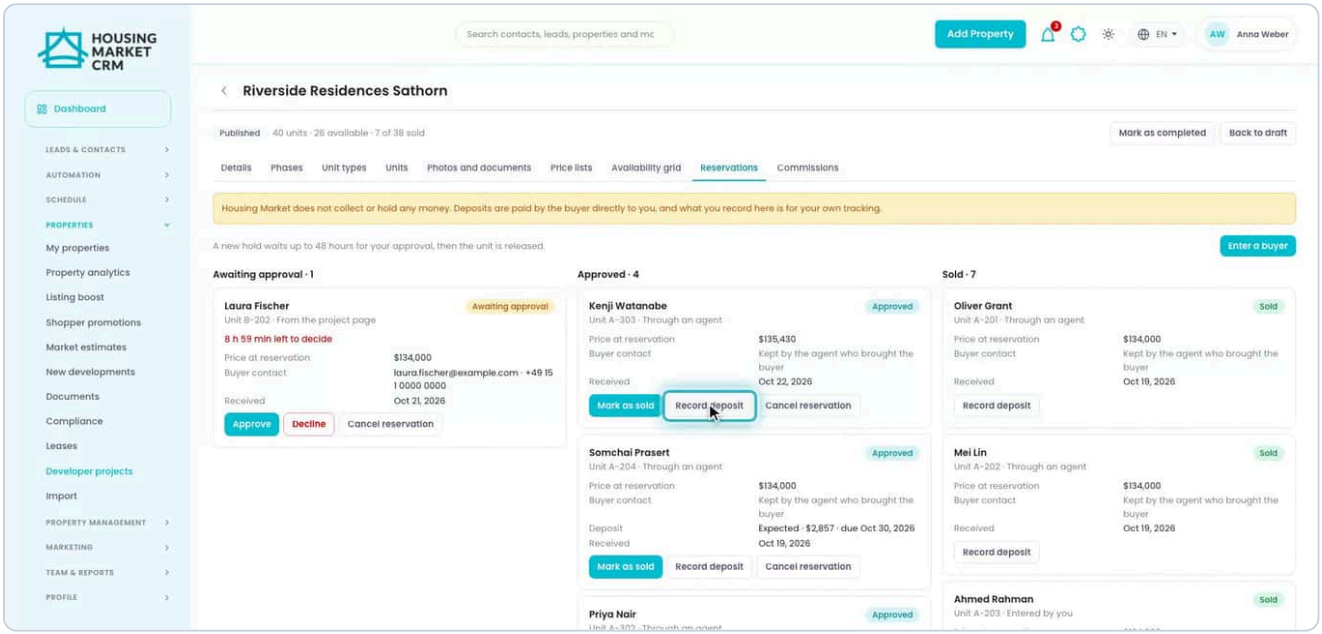


Figure 109.6 · Screen recorded 23 October 2026

7 Then **Mark as sold**, with the final price.

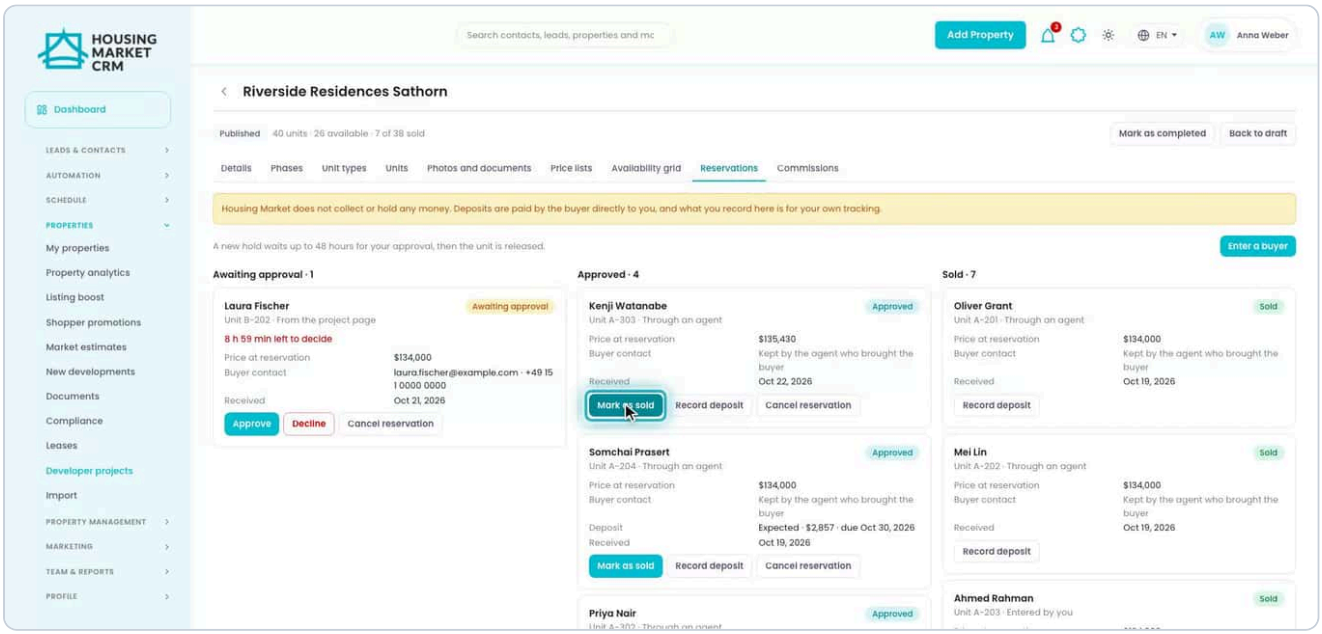


Figure 109.7 · Screen recorded 23 October 2026

8 Open **Commissions**.

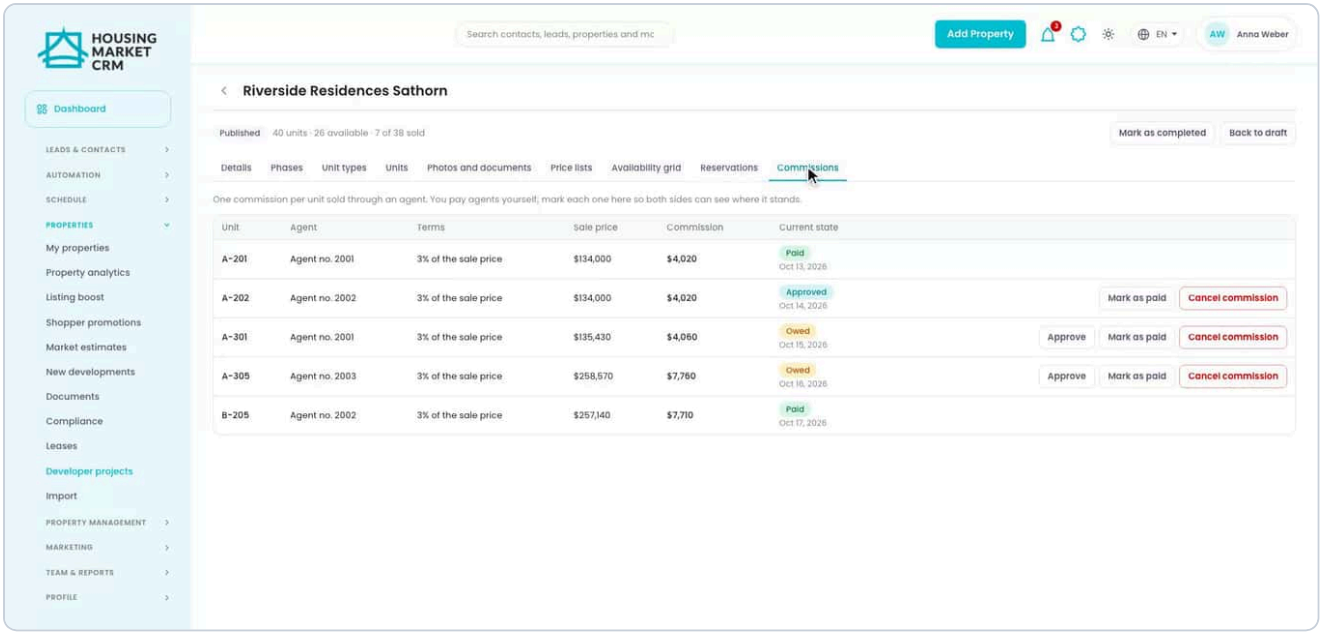


Figure 109.8 · Screen recorded 23 October 2026

9 One per unit sold through an agent. **You pay them yourself**.

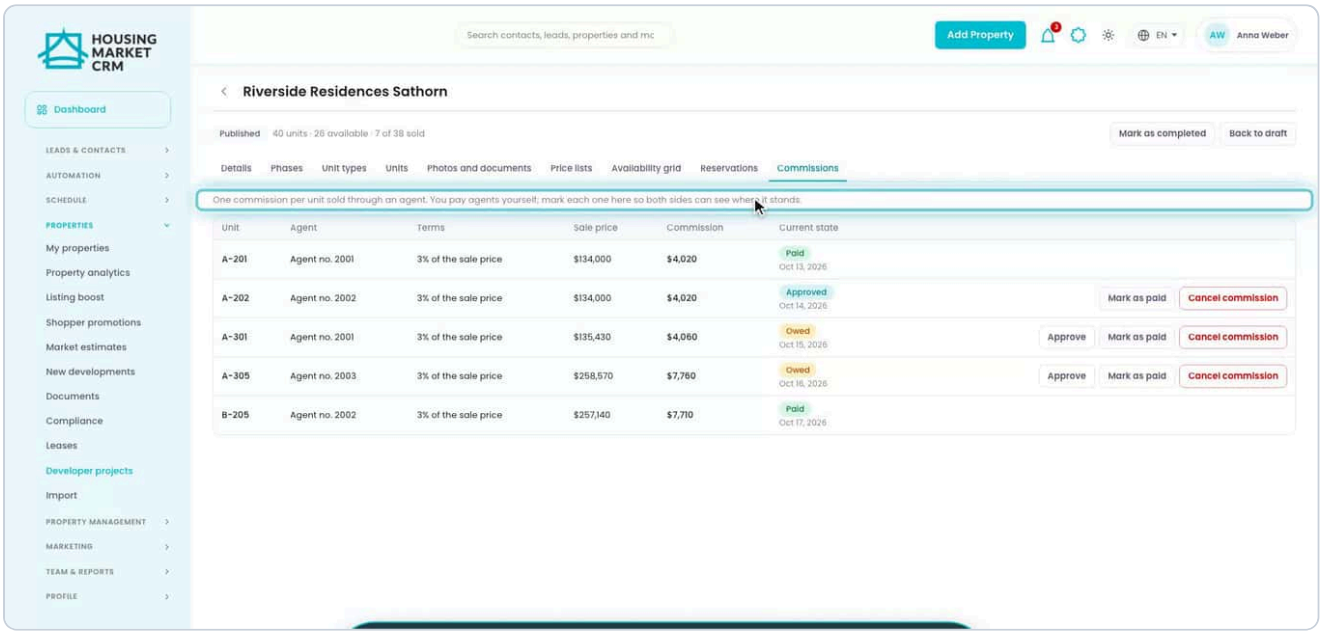


Figure 109.9 · Screen recorded 23 October 2026

10 **Approve**, then **Mark as paid** — both sides see it.

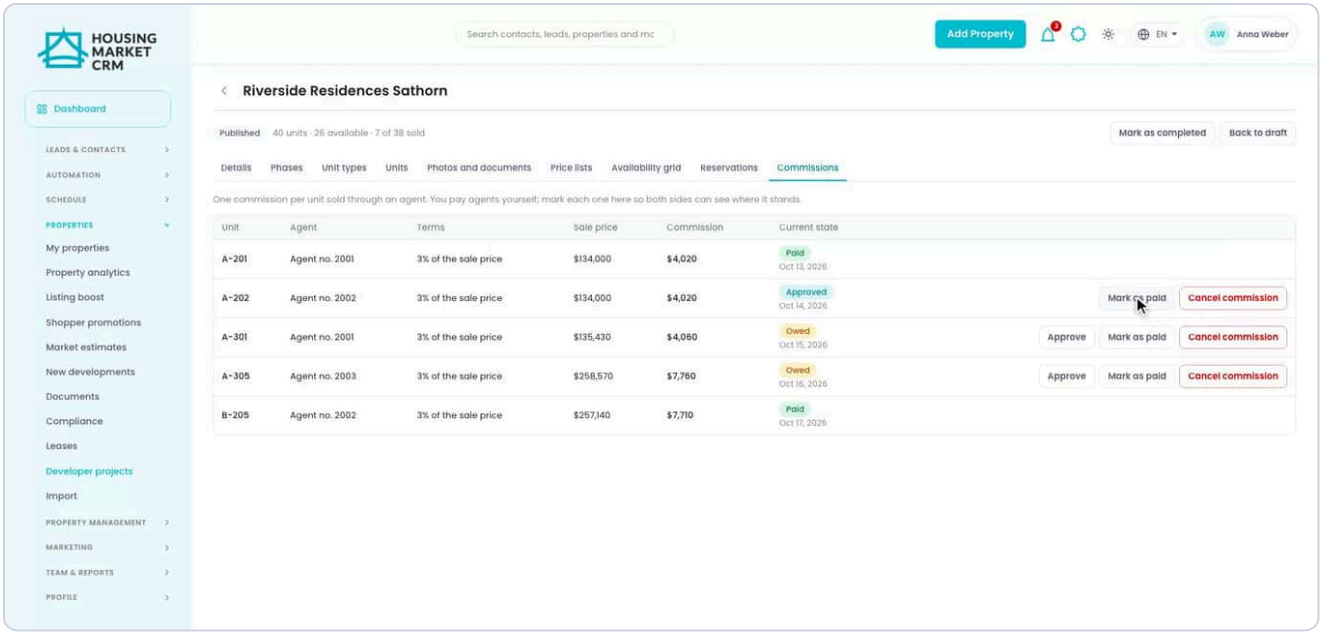


Figure 109.10 · Screen recorded 23 October 2026

RELATED HELP CENTER ARTICLES

How do I invoice a deal, and who is owed what?	faq.housingmarketgroup.com/faq/how-do-i-invoice-a-deal-and-who-is-owed-what

110 CHAPTER 110

Launch an off-plan development

Paid add-on | For agents | Watch the video

OVERVIEW

An application for property developers to launch off-plan projects: floor plans, unit types, price lists, media and a live grid of available, reserved and sold units, with a project page on the country portal.

Each project has a page on the country portal showing which units are available, and enquiries from it arrive as the developer's leads. The developer's dashboard shows sales progress, units by status, agent performance and the reservation pipeline.

Agents who use Housing Market CRM see developer projects and their available units, can reserve a unit for their buyer and track commission per unit sold.

The Developer Launch Platform is an add-on to Housing Market CRM, bought on any plan, the free one included. Building a project is free. Publishing its page is charged per month by the number of active projects: 149 USD for one, 499 USD for up to five, or 999 USD for unlimited projects. Agents browse projects and reserve units at no charge.

From the Help Center: **What is the Developer Launch Platform?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

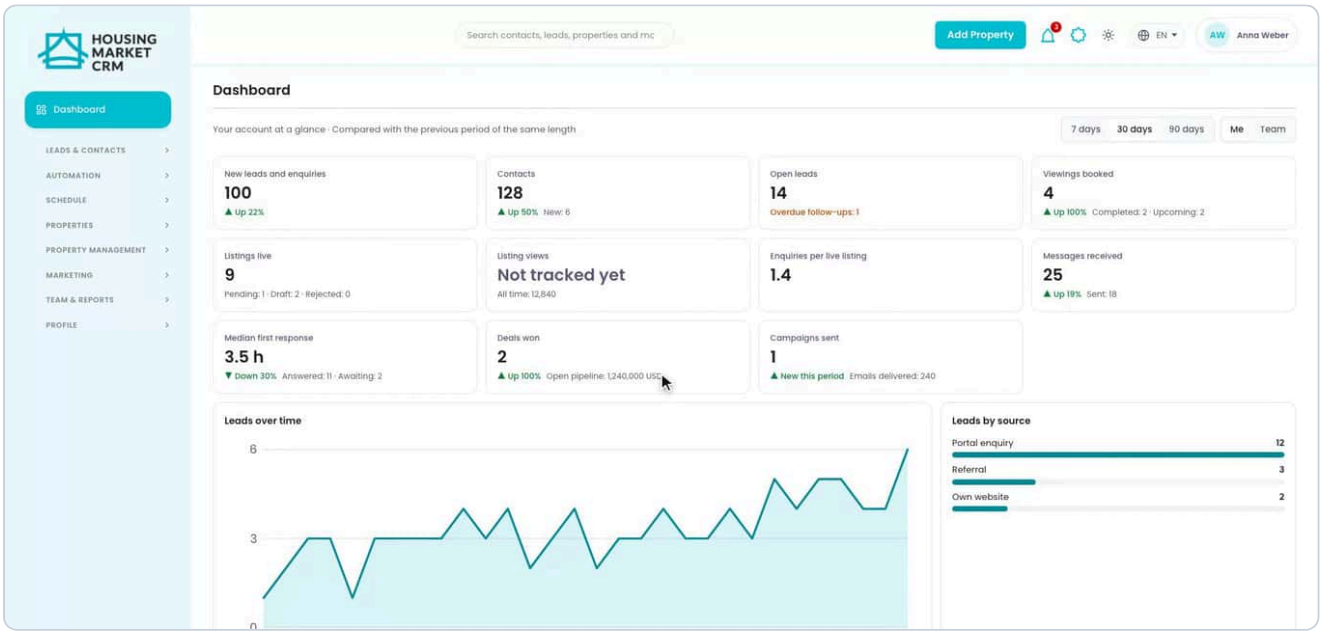


Figure 110.1 · Screen recorded 4 November 2026

2 Open **Properties** in the left menu.

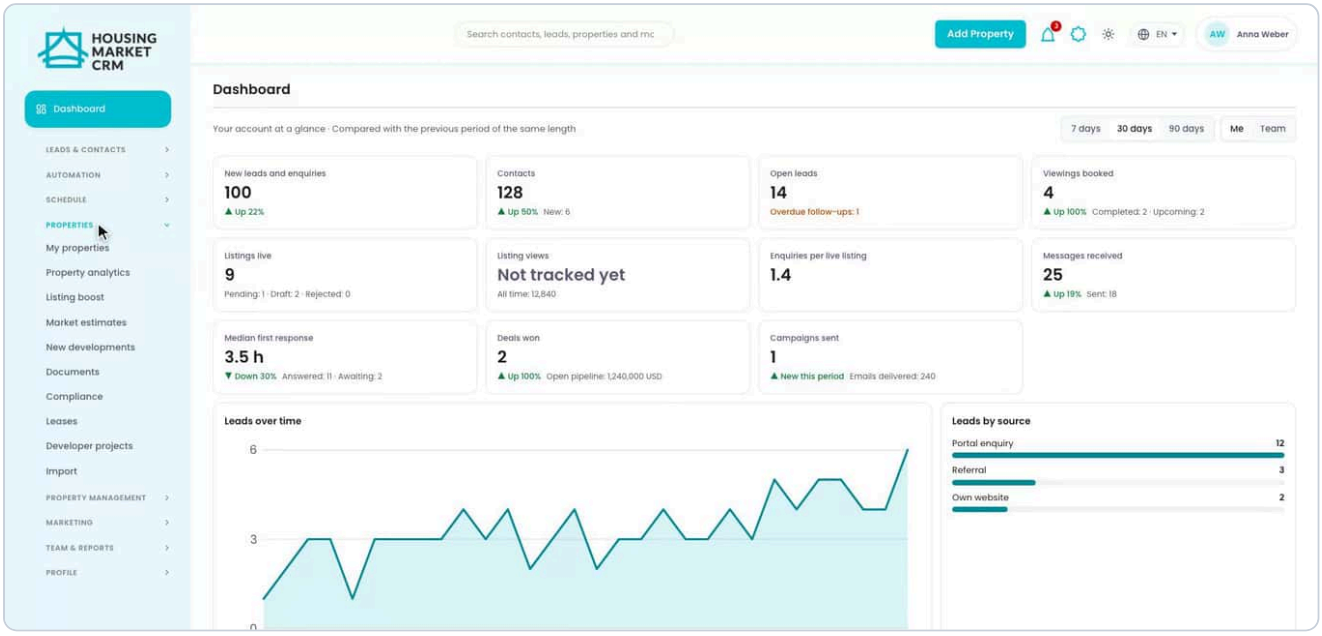


Figure 110.2 · Screen recorded 4 November 2026

3 Click **Developer projects**.

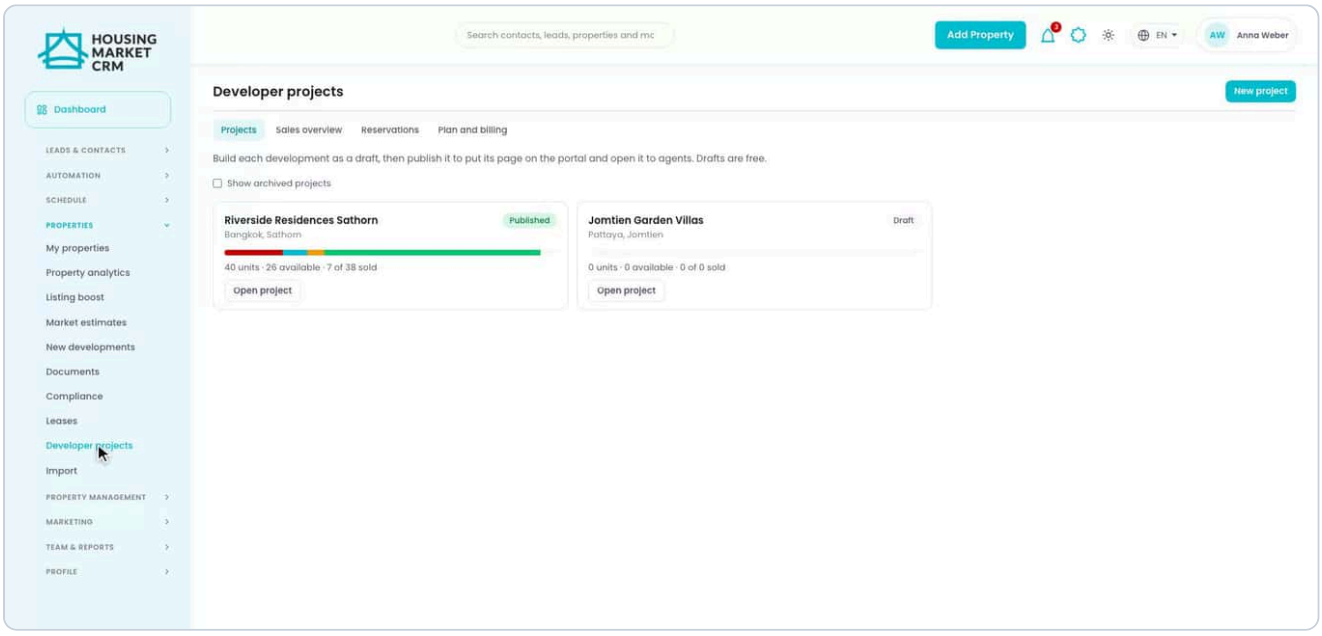


Figure 110.3 · Screen recorded 4 November 2026

4 Build each development as a **free draft**, then **publish** it.

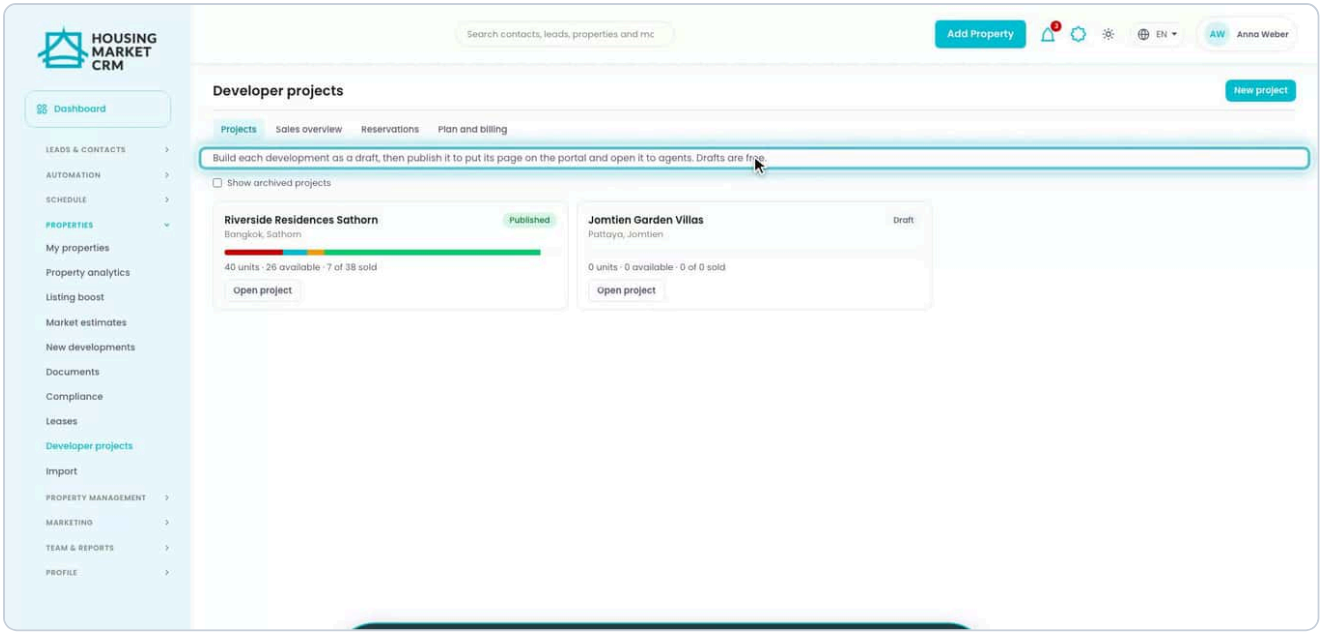


Figure 110.4 · Screen recorded 4 November 2026

5 Open a **draft** project.

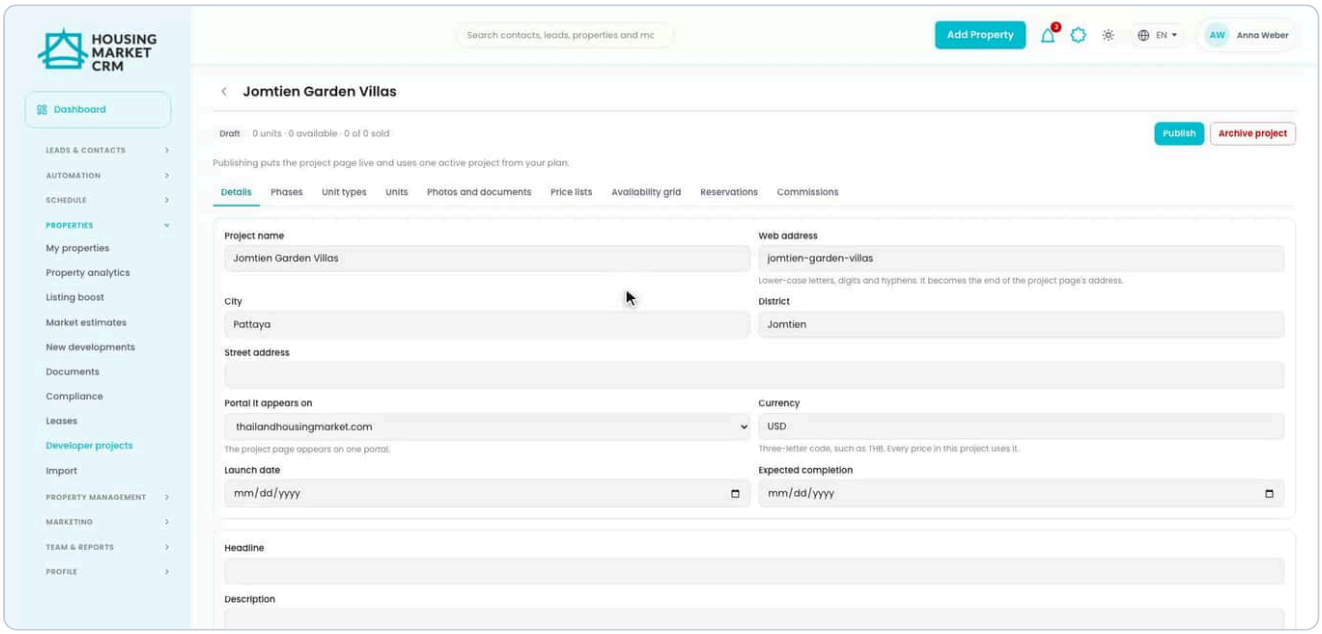


Figure 110.5 · Screen recorded 4 November 2026

6 **Publish** puts its page on the portal and opens it to agents.

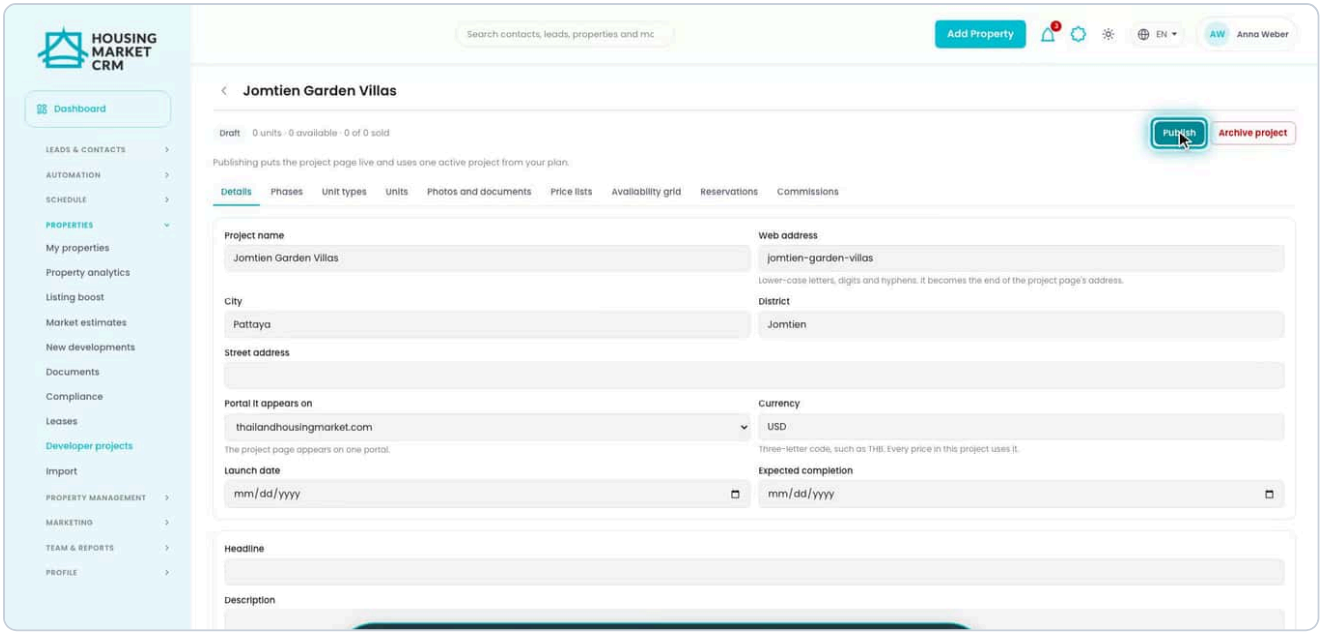


Figure 110.6 · Screen recorded 4 November 2026

7 Back to **Developer projects**.

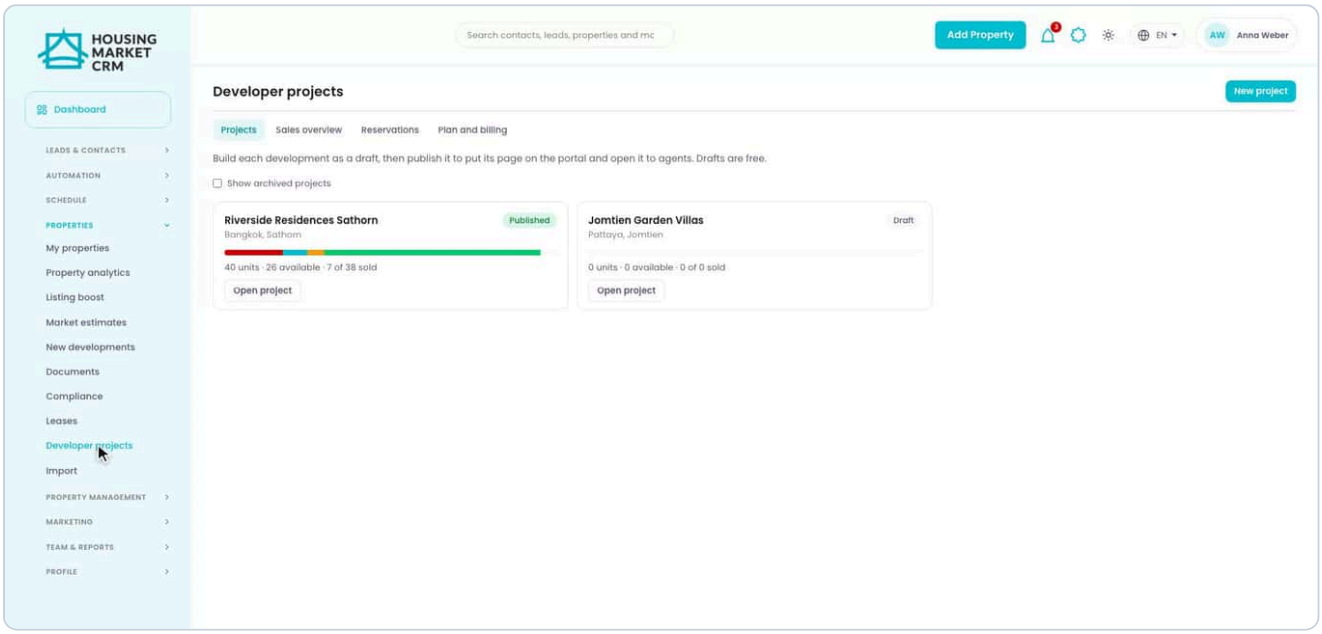


Figure 110.7 · Screen recorded 4 November 2026

8 Open a **published** project.

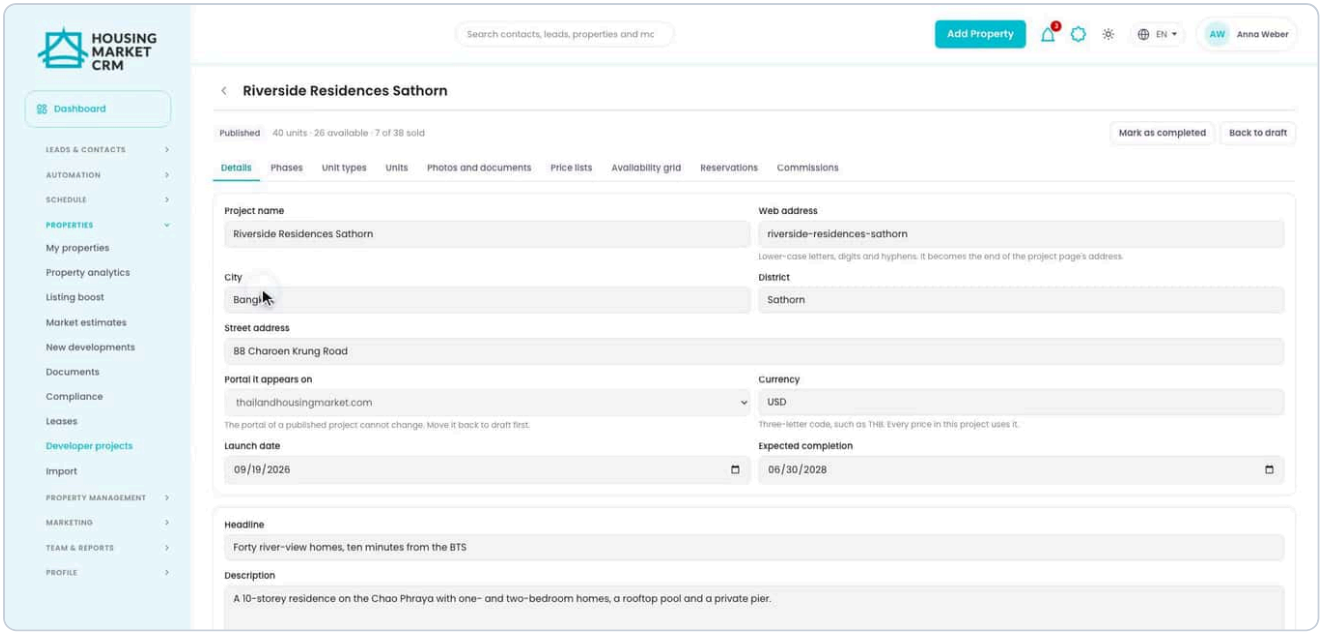


Figure 110.8 · Screen recorded 4 November 2026

9 Set the **launch date**, the **deposit** and the **commission** agents earn.

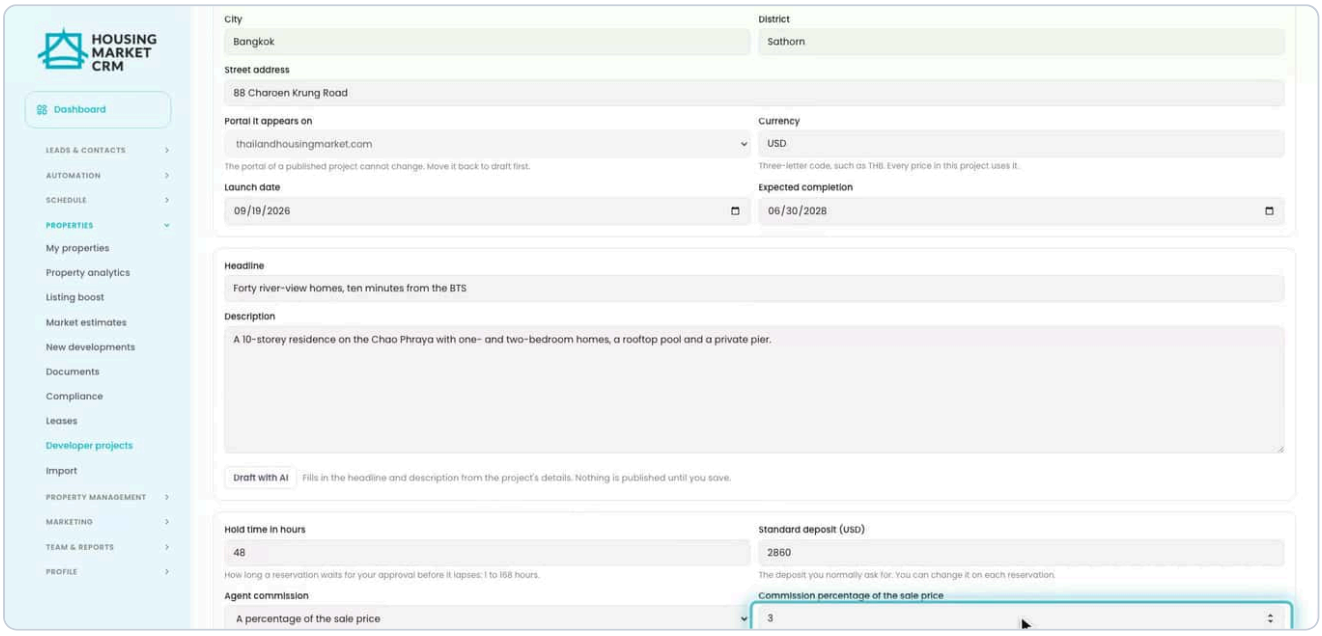


Figure 110.9 · Screen recorded 4 November 2026

10 Let **agents** reserve units for their buyers.

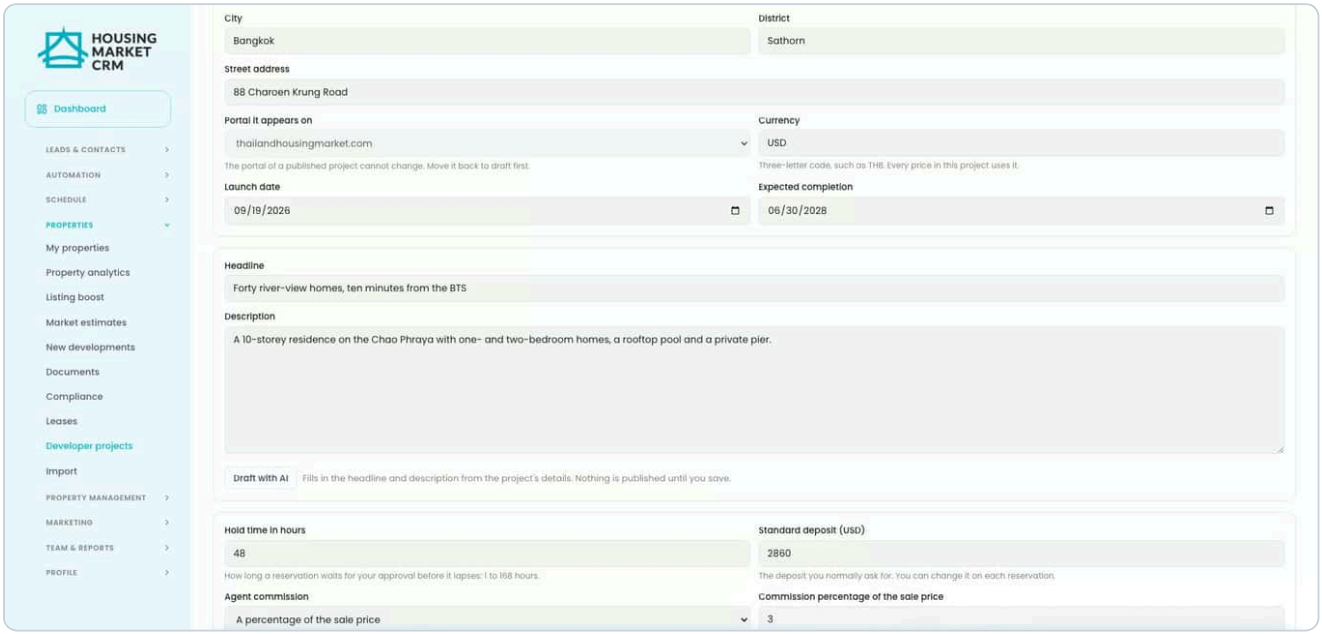


Figure 110.10 · Screen recorded 4 November 2026

11 Click **Availability grid**.

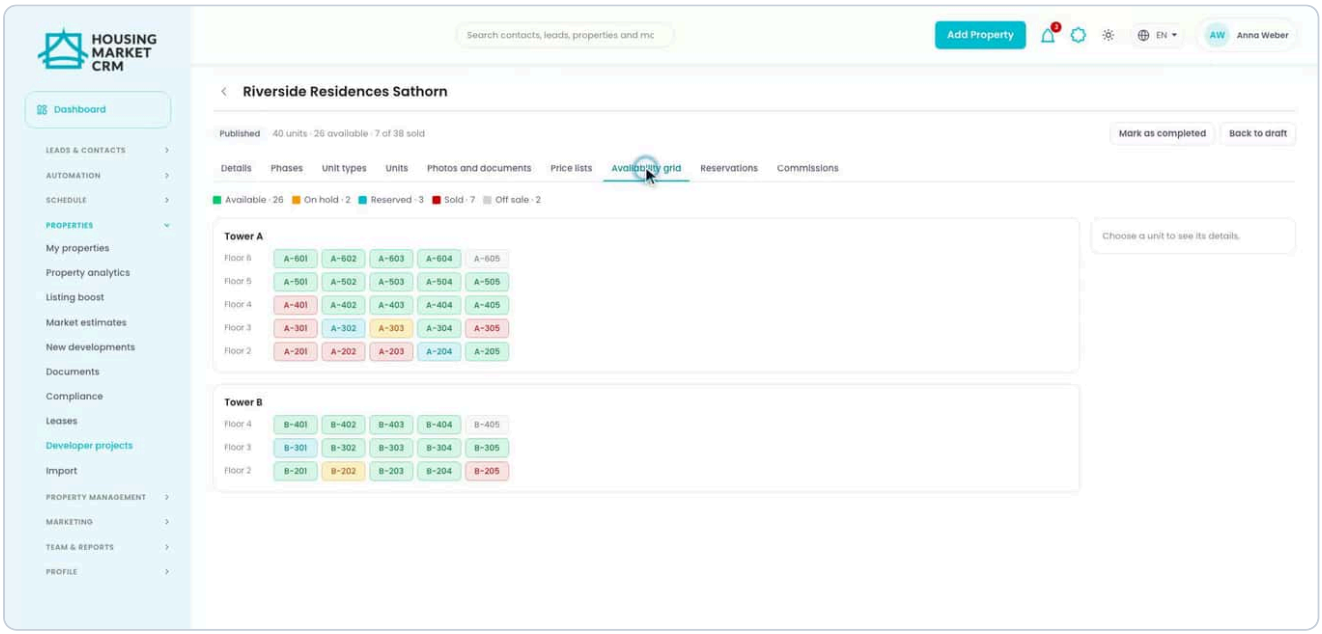


Figure 110.11 · Screen recorded 4 November 2026

12 Every unit by floor: **available**, on hold, reserved or **sold**.

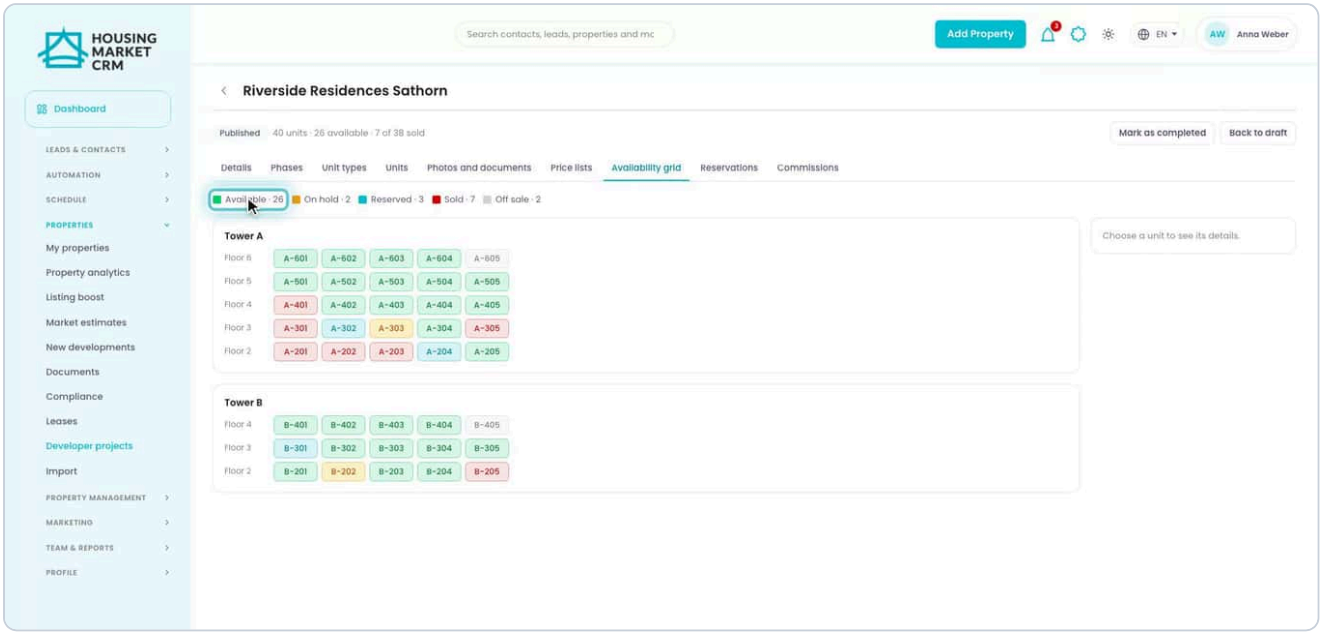


Figure 110.12 · Screen recorded 4 November 2026

13 Click a unit to see its details.

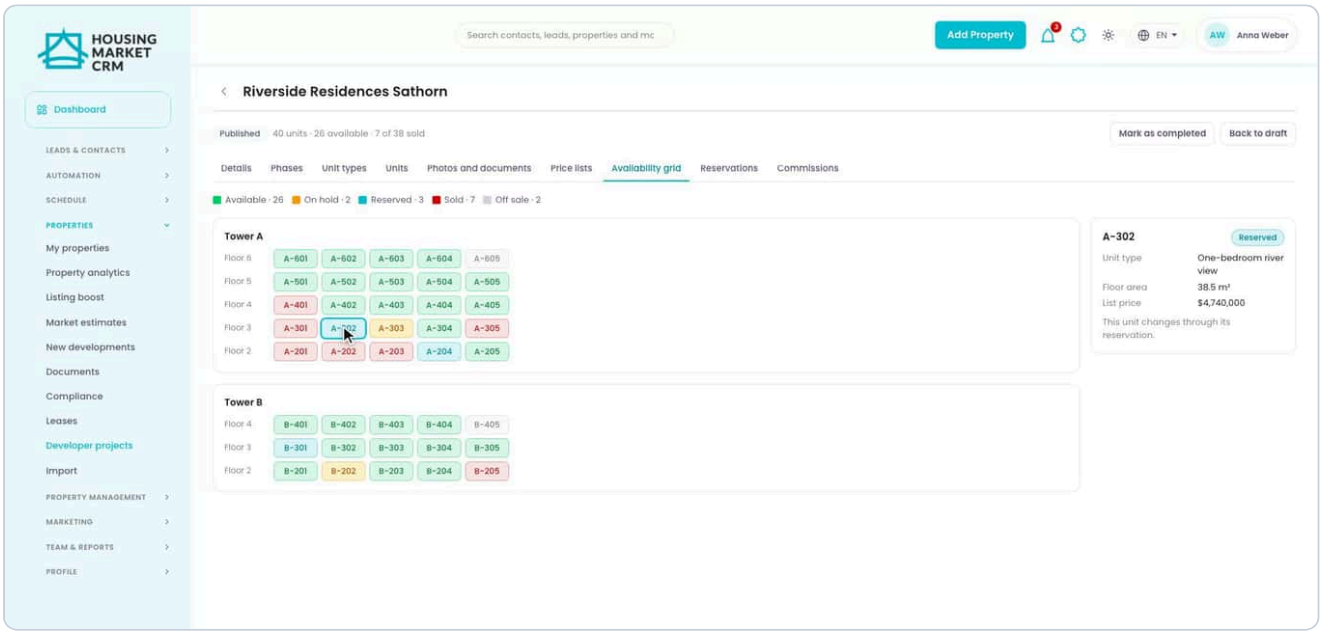


Figure 110.13 · Screen recorded 4 November 2026

14 Back to **Developer projects**.

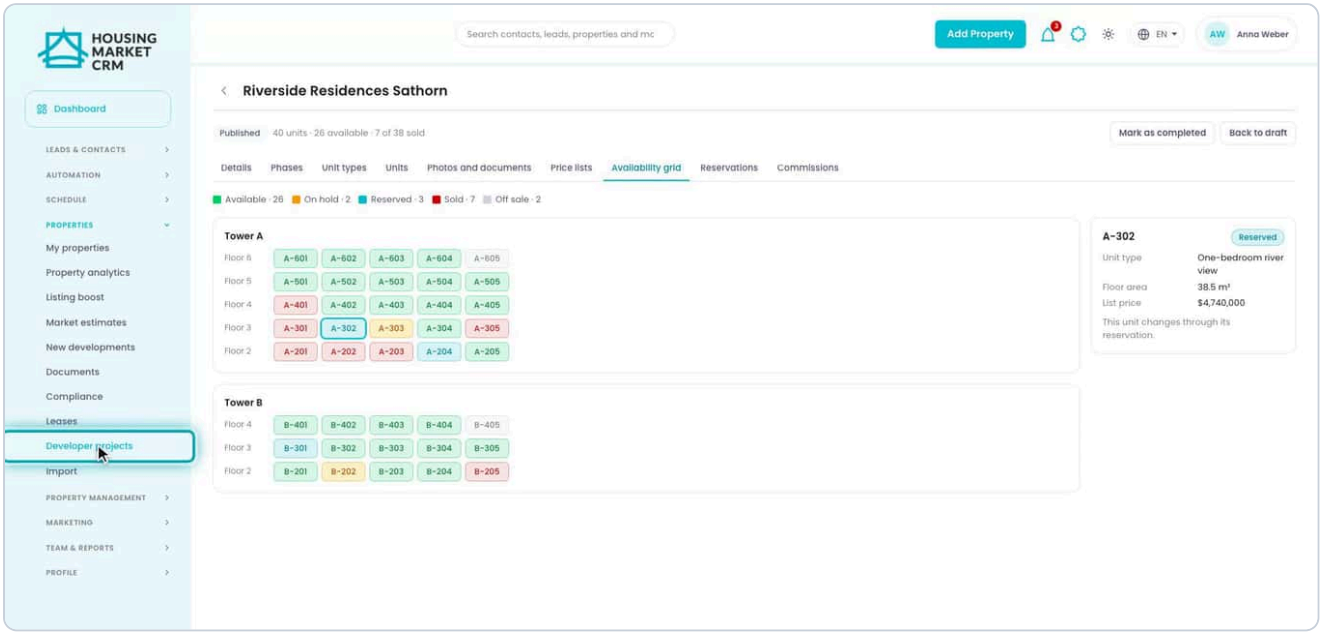


Figure 110.14 · Screen recorded 4 November 2026

15 Click **Plan and billing**.

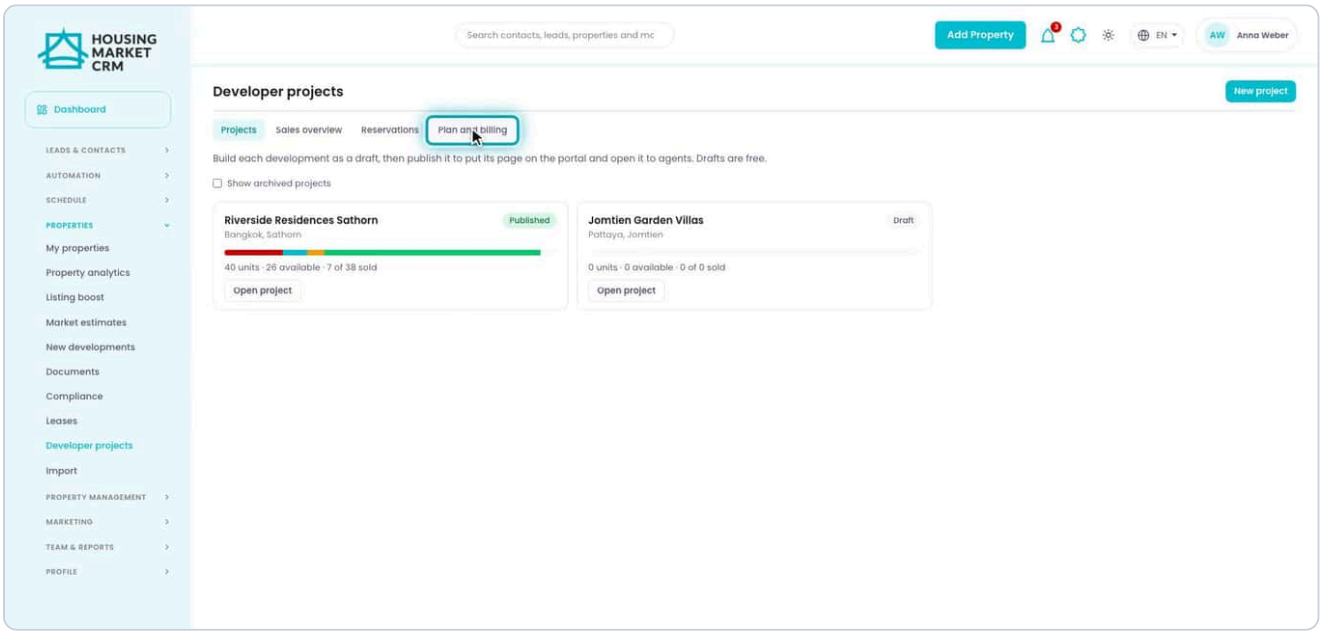


Figure 110.15 · Screen recorded 4 November 2026

16 From **$149** a month for one project to **$999** for unlimited.

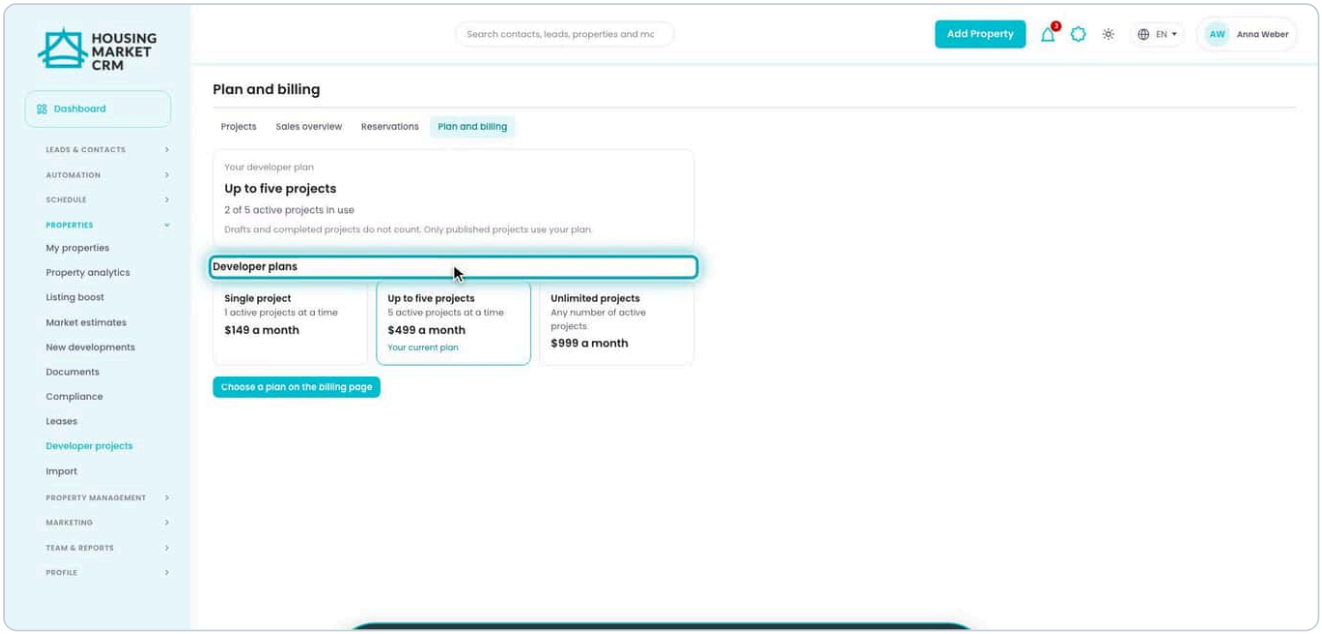


Figure 110.16 · Screen recorded 4 November 2026

17 Only **published** projects count. Drafts are free.

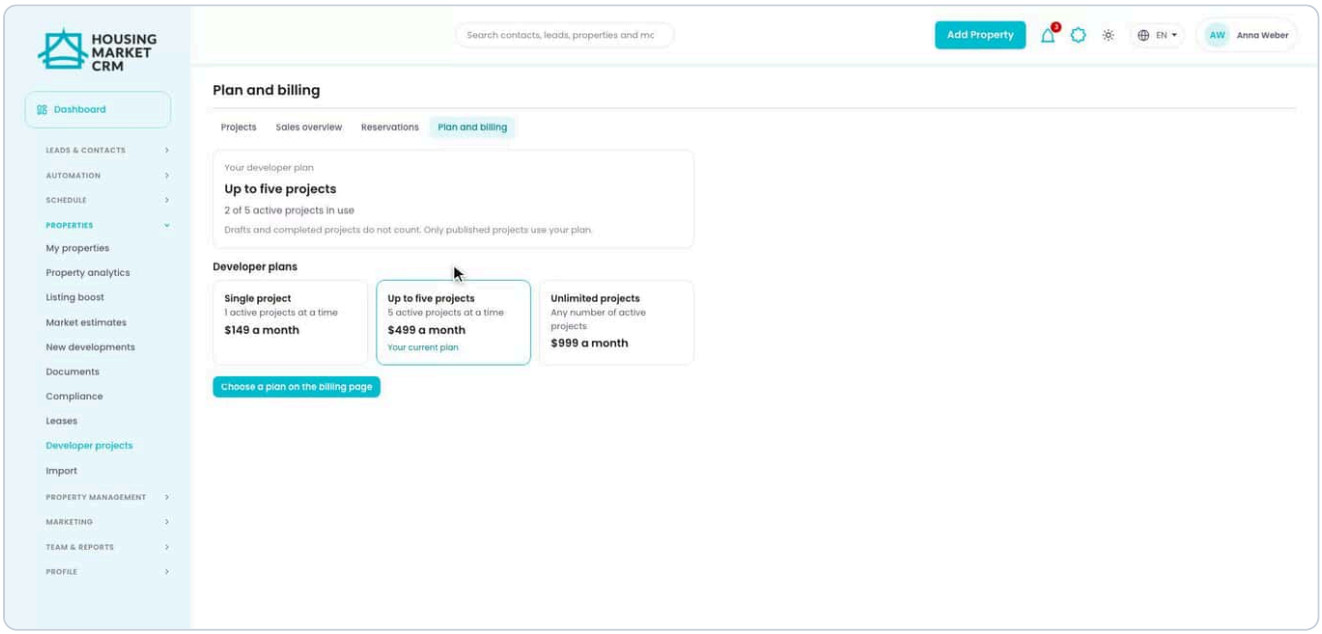


Figure 110.17 · Screen recorded 4 November 2026

111 CHAPTER 111

Message a developer

All plans | For agents | Watch the video

OVERVIEW

When a developer publishes a new project, the agents who work in its area are alerted once, in the bell and by email. You choose your areas and can mute a developer. You can also message the developer about a project.

These features belong to the Developer Launch Platform (see "What is the Developer Launch Platform?"). The developer decides which agents hear about a project, and each agent decides which alerts they want.

For the developer: who will be alerted

In a project, open the Audience tab, Who will be alerted. Choose the country of the project and, if you like, a province or state, a city, a district, or a radius around the project of 1 to 200 km, which needs the project's map location. When you publish the project, Housing Market alerts the agents who work in that area, by notification and by email. Nothing is sent while the project is a draft.

You only see a number, About so many agents will be alerted. Agents' names and contact details are never shown to you, and an agent is in touch with you only if they reply or reserve a unit. Agents who muted you, switched these alerts off or have reached their weekly limit are not counted. Alerts go out once, the first time a project is published: editing the project or changing the audience later never sends a second alert, and the audience can no longer change once the project has been announced.

For the agent: choose which alerts you hear

Under Properties, New developments, open the Alerts tab. Countries switches off the countries you do not want alerts about. Where I work lists the places you work in, by country, province or state, city and district; developers choose agents by area, and with no area the country of your account is used. Developers lets you mute a developer, which stops their new project alerts while you can still browse their projects, and unmute them again at any time.

How you are told, the bell only, email only, both or off, and whether as they happen or in a daily summary, is set under Settings, Notifications, in New development alerts. The CRM sends at most one alert email a day and no more than three alerts a week to an agent; if several projects are published on the same day, you receive them together in one summary. Each email has a link to unsubscribe.

Message the developer

On a project that is open to agents, and on a reservation you made, choose Message the developer. The conversation is about the whole project, or about one unit when you start it from a reservation, and it appears in your Inbox under the Projects filter, with the usual unread marker. A developer can message an agent from a reservation that agent made on their project, using Message the agent, and never an agent who muted them.

Only the agent and the developer can read the conversation, and no buyer is in it: a message that contains an email address or a phone number is refused. A message can be up to 4,000 characters, and you can send up to 60 messages an hour. You are told of a new message in the bell only, never by email.

From the Help Center: **How do new-development alerts and messages to a developer work?**

STEP BY STEP

1. Open your **Housing Market CRM** account.

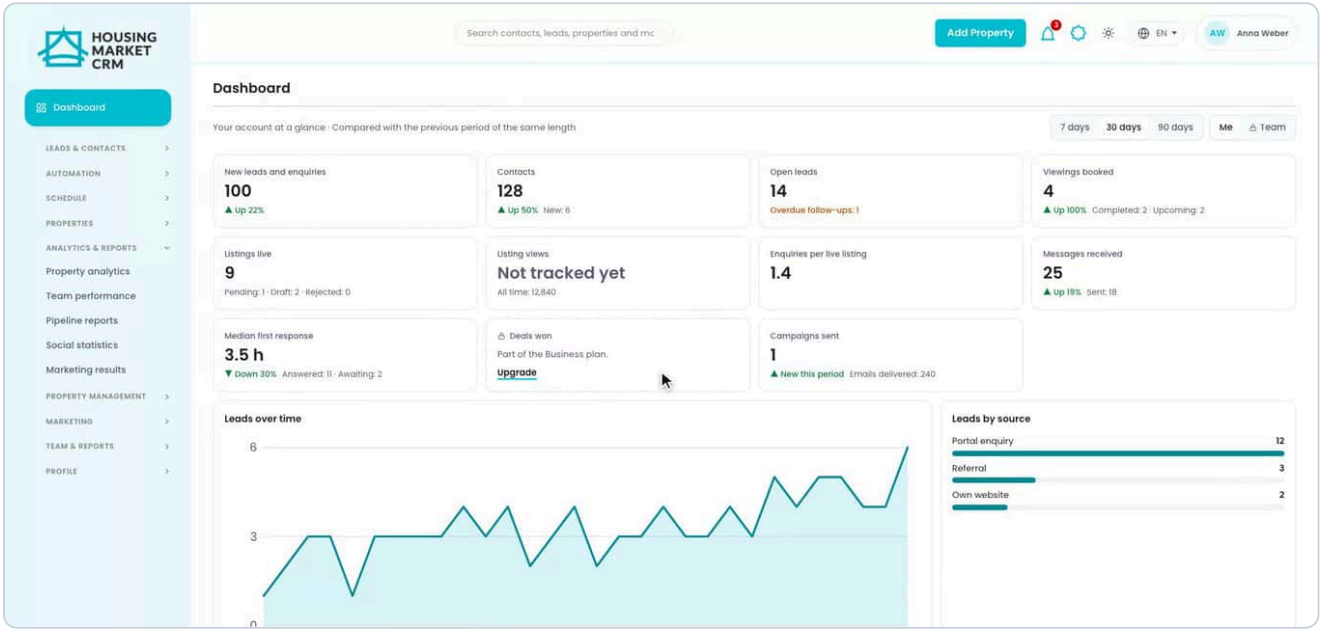


Figure 111.1 · Screen recorded 1 November 2026

2 Open **Properties** in the left menu.

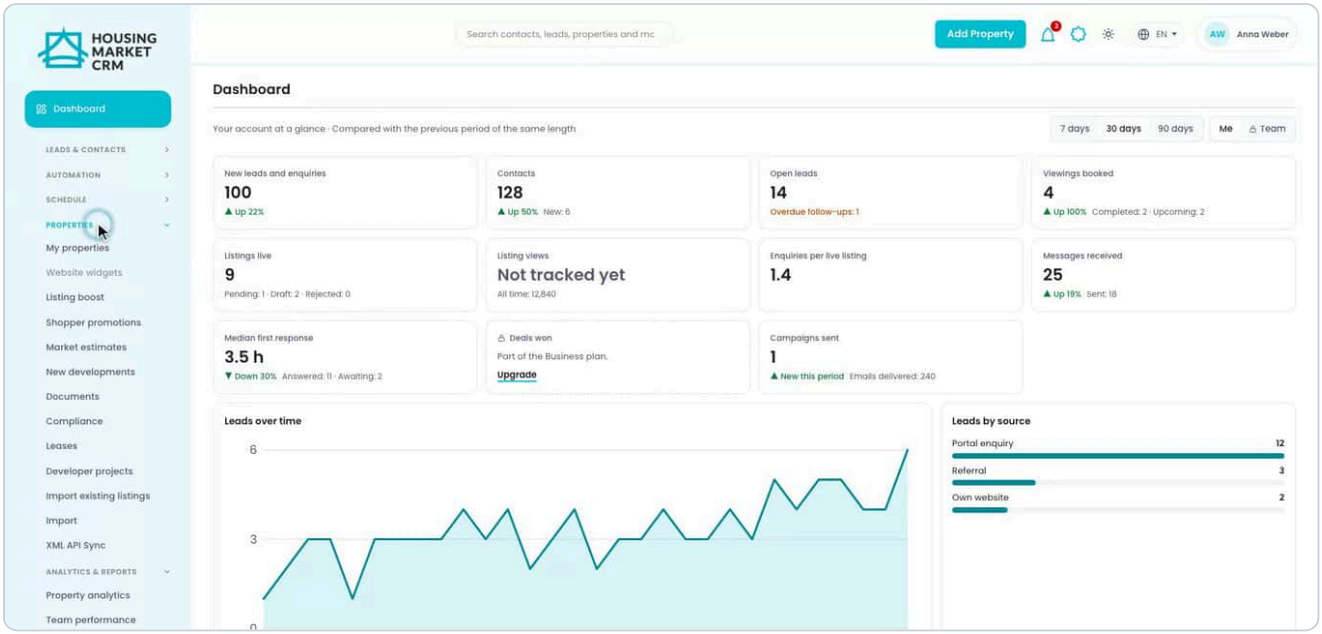


Figure 111.2 · Screen recorded 1 November 2026

3 Click **New developments**.

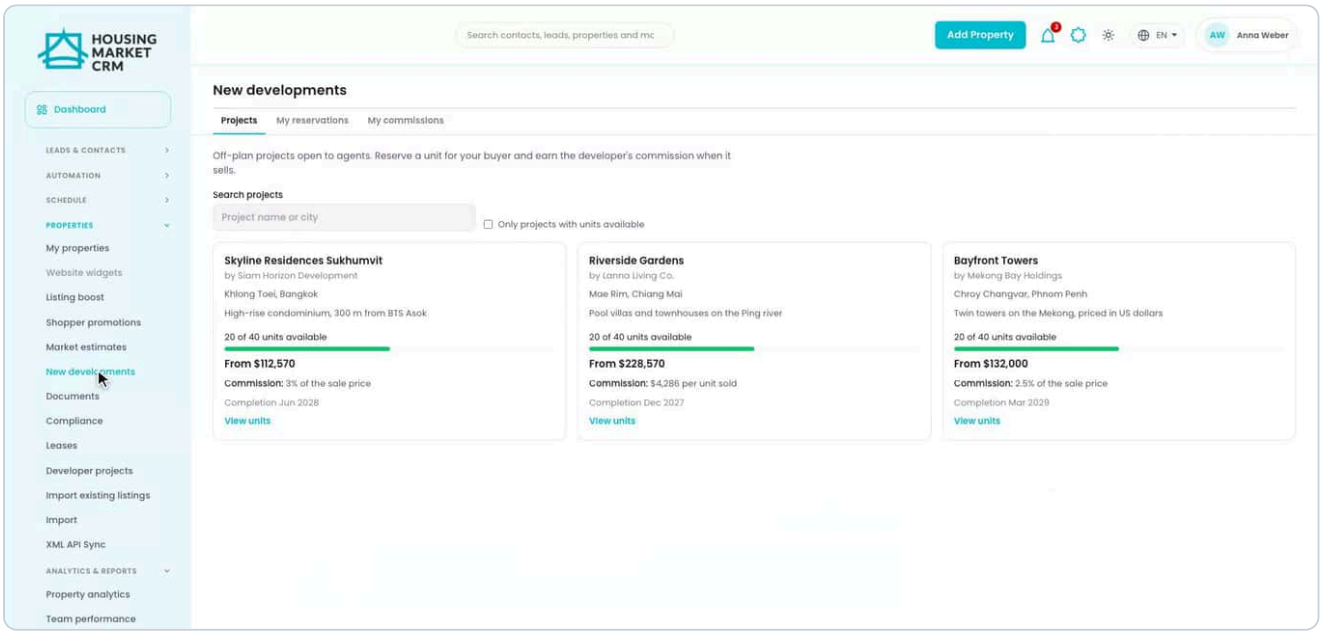


Figure 111.3 · Screen recorded 1 November 2026

4 Pick the **project** you are selling.

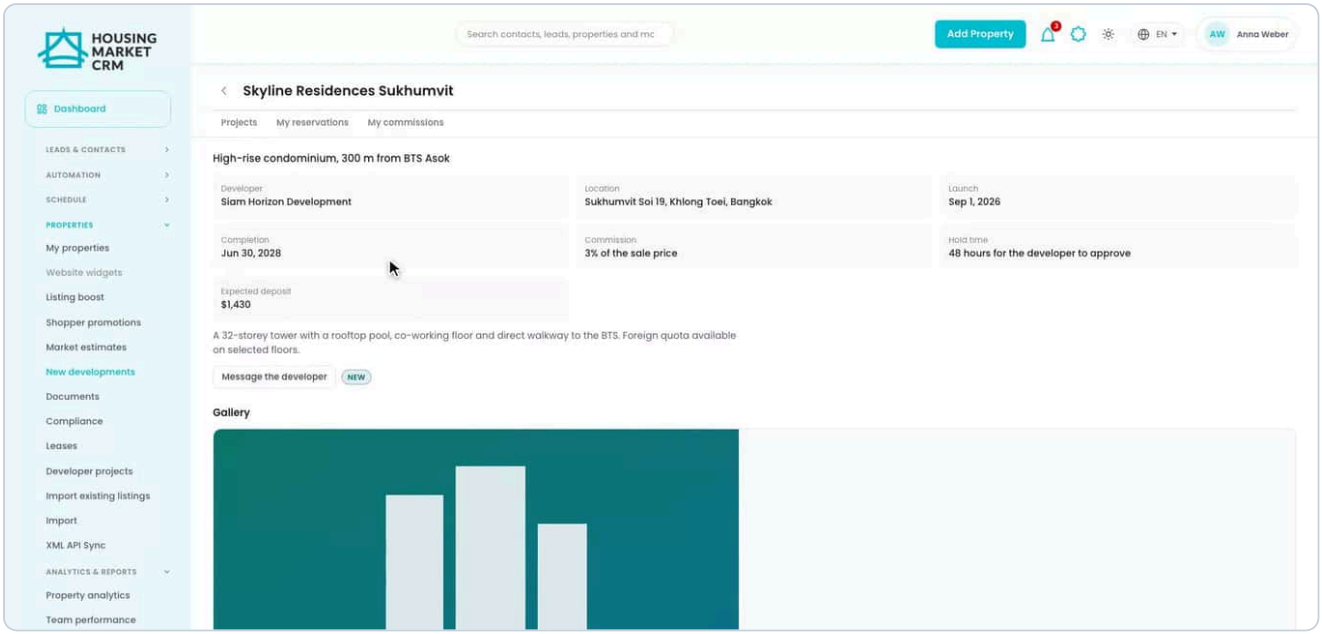


Figure 111.4 · Screen recorded 1 November 2026

5 Click **Message the developer**.

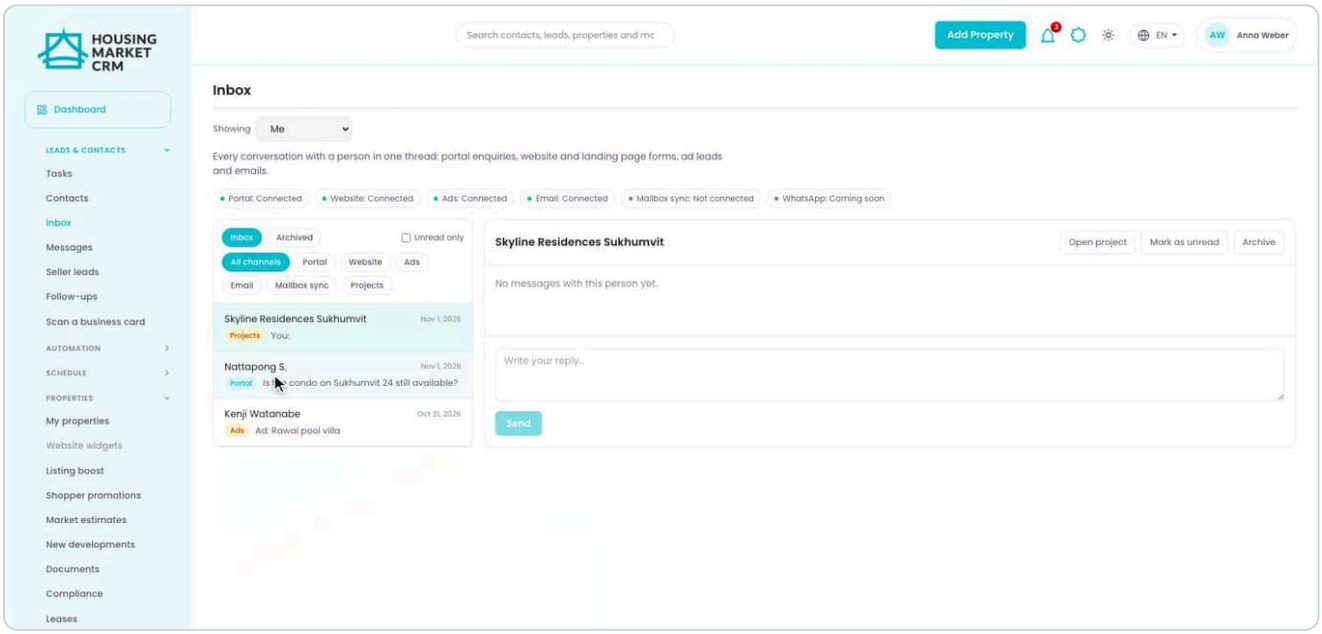


Figure 111.5 · Screen recorded 1 November 2026

6 The conversation opens in your **Inbox**, linked to the project.

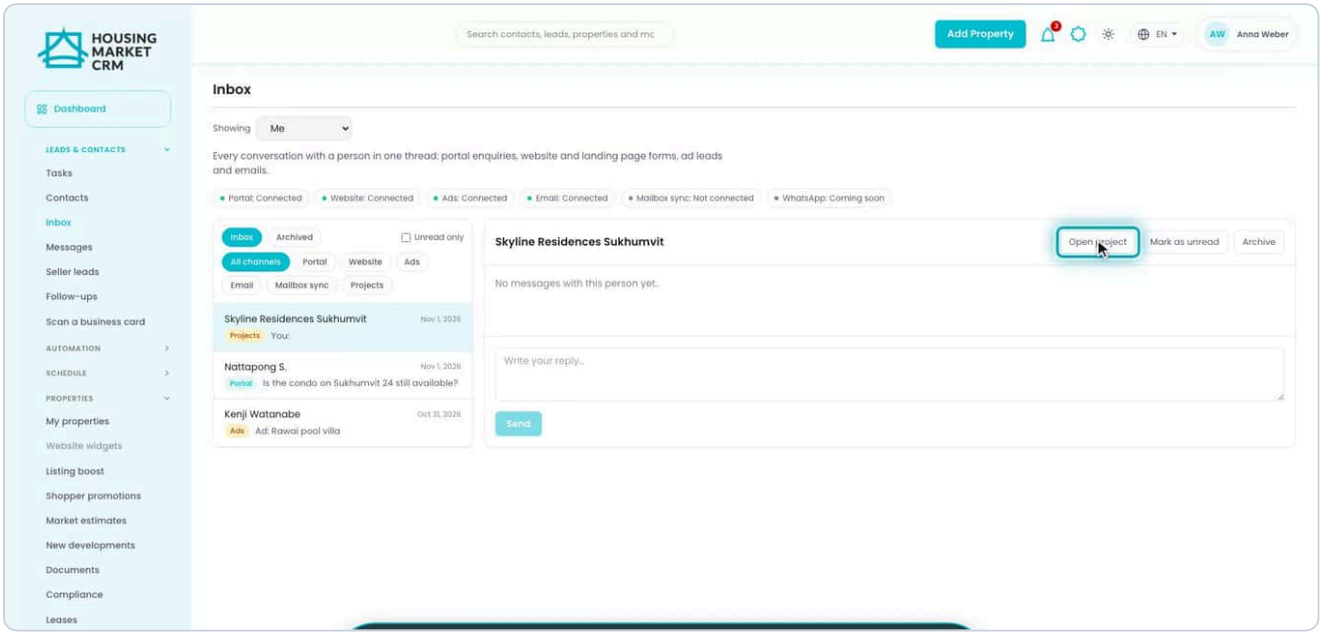


Figure 111.6 · Screen recorded 1 November 2026

7 Write your **question**.

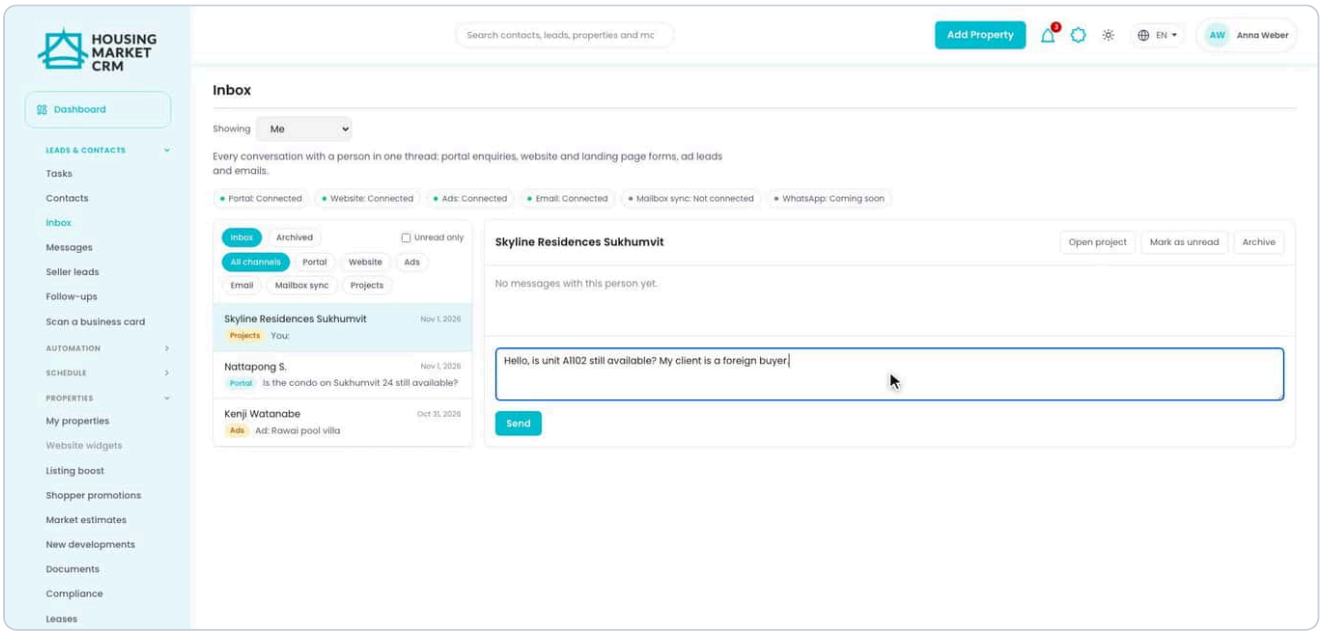


Figure 111.7 · Screen recorded 1 November 2026

8 Click **Send**.

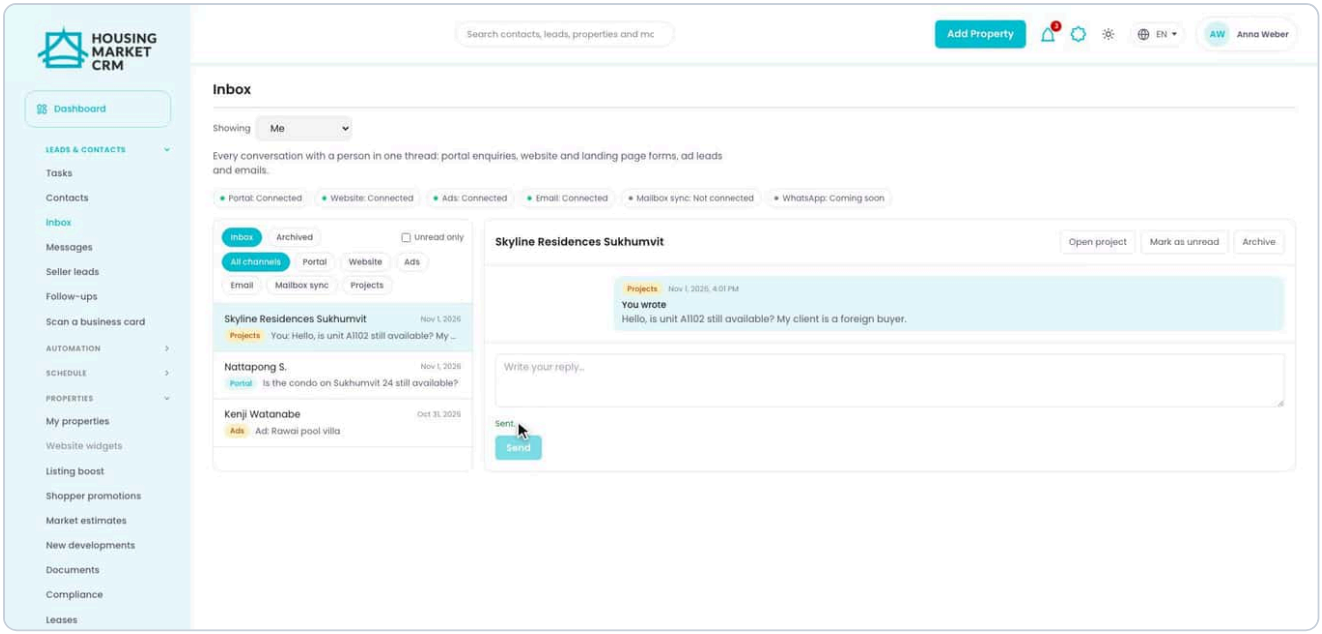


Figure 111.8 · Screen recorded 1 November 2026

9 When the developer answers, you get a **notification in the bell**.

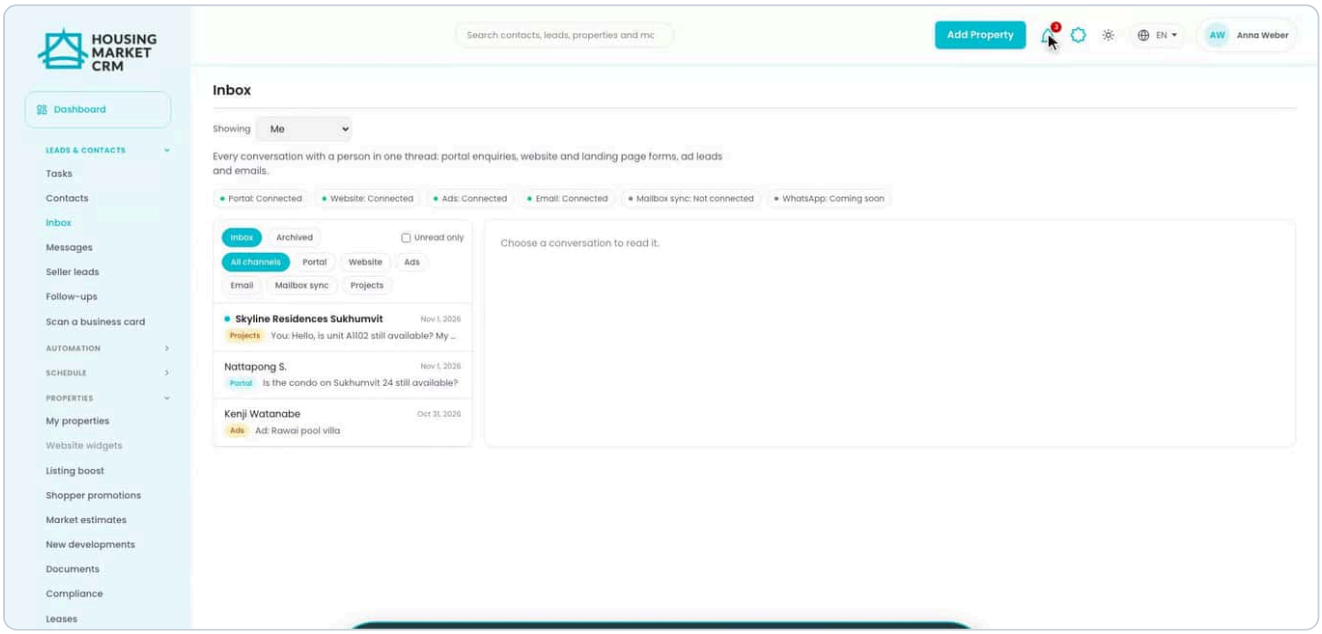


Figure 111.9 · Screen recorded 1 November 2026

10 In the **Inbox**, click **Projects** to see only project conversations.

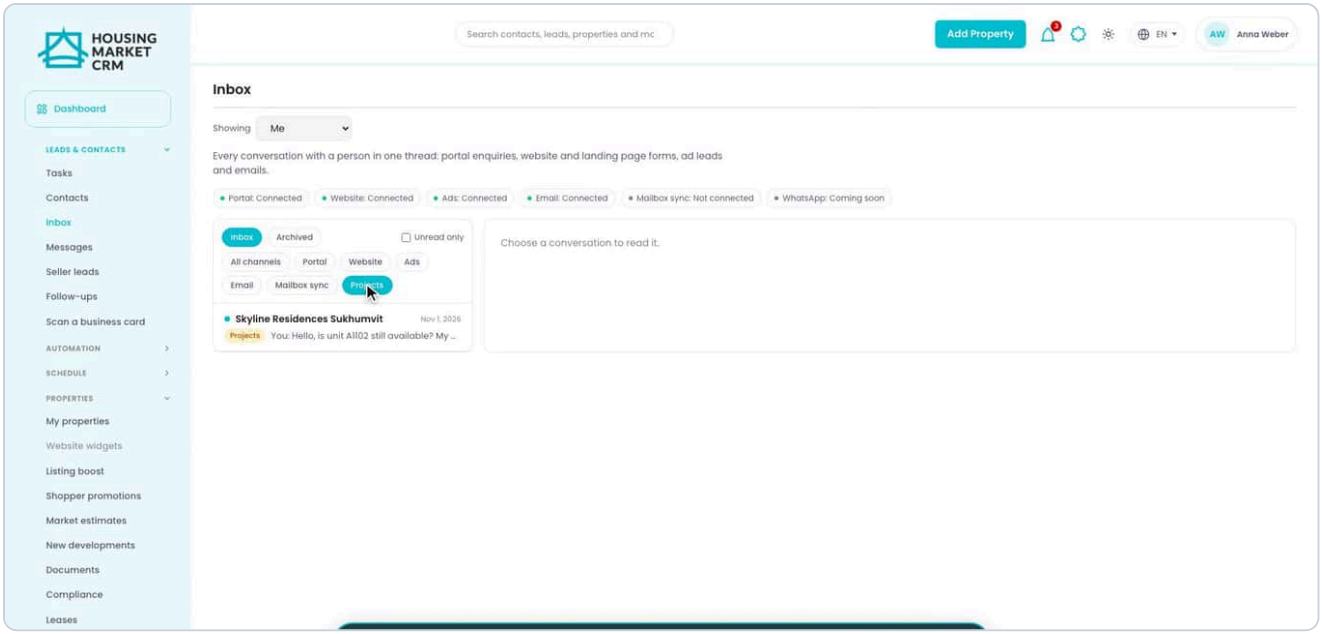


Figure 111.10 · Screen recorded 1 November 2026

11 Open the **conversation**.

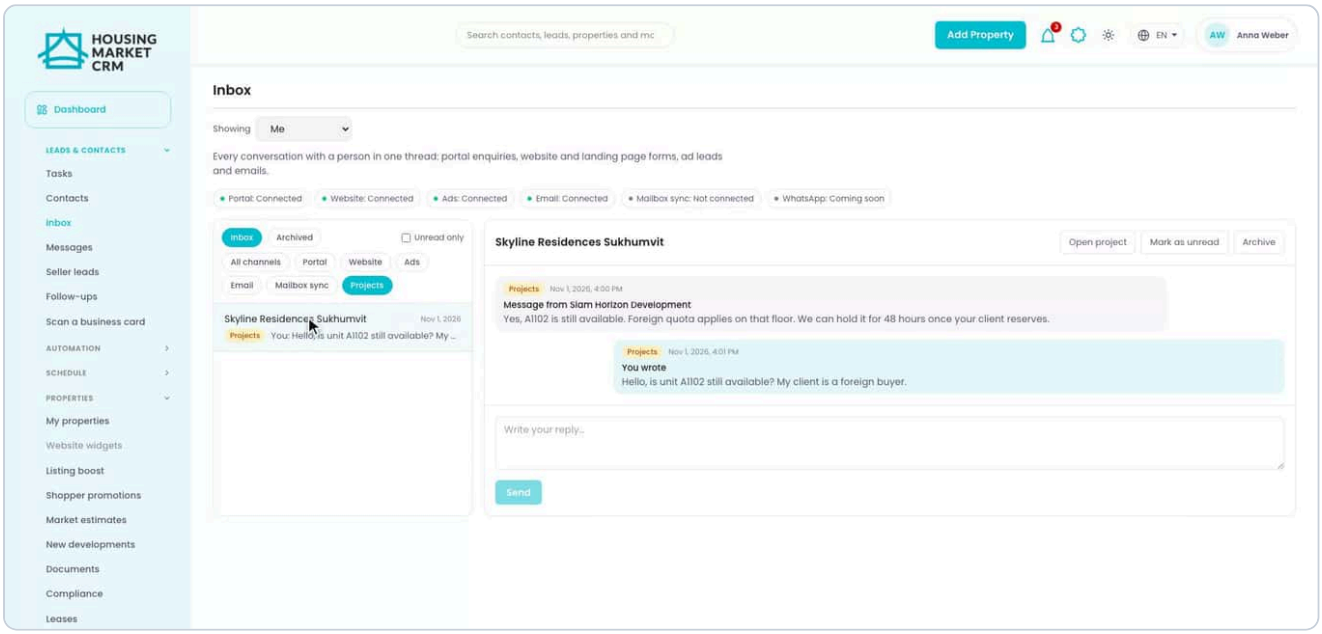


Figure 111.11 · Screen recorded 1 November 2026

12 Here is the **developer's answer**. Reply in the same place.

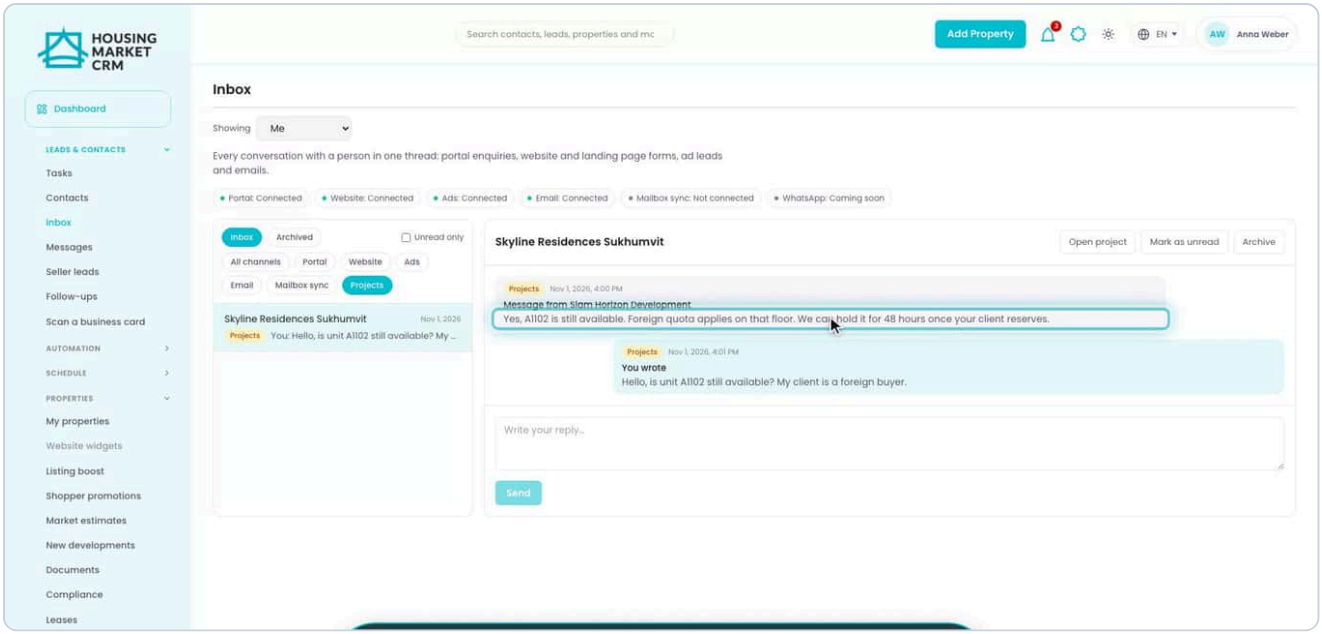


Figure 111.12 · Screen recorded 1 November 2026

13 One conversation per project, **kept together** in your Inbox.

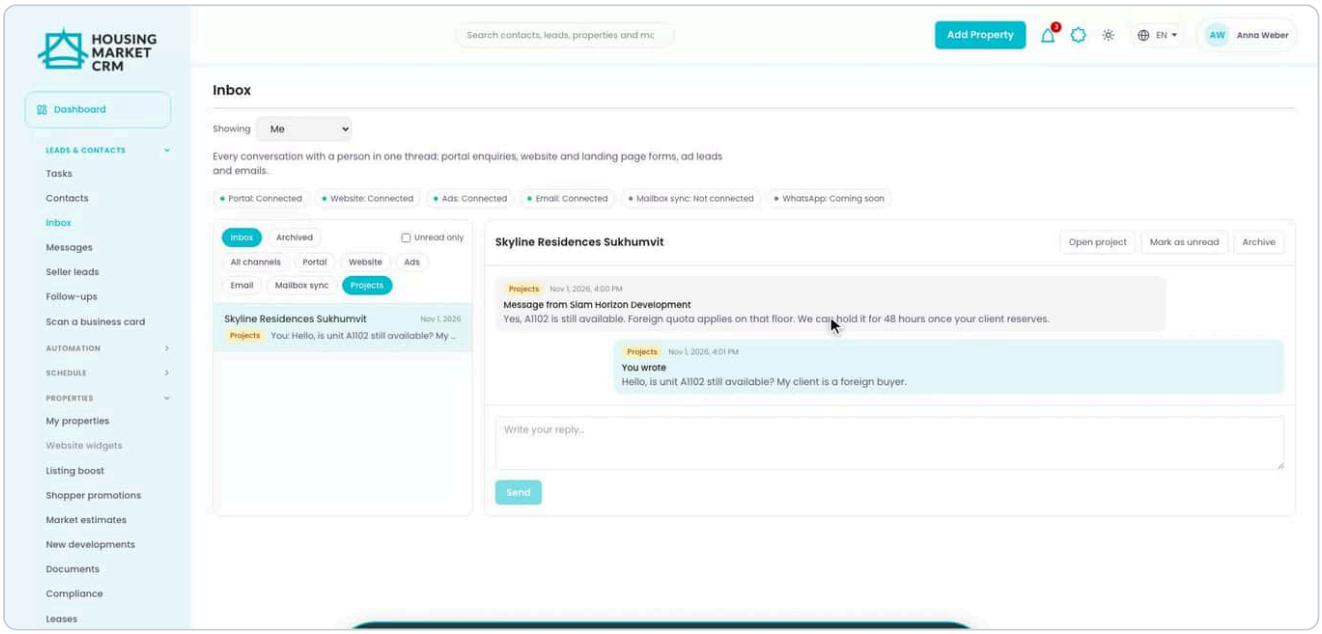


Figure 111.13 · Screen recorded 1 November 2026

112 CHAPTER 112

Choose which agents are alerted

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

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How you are told, the bell only, email only, both or off, and whether as they happen or in a daily summary, is set under Settings, Notifications, in New development alerts. The CRM sends at most one alert email a day and no more than three alerts a week to an agent; if several projects are published on the same day, you receive them together in one summary. Each email has a link to unsubscribe.

Message the developer

On a project that is open to agents, and on a reservation you made, choose Message the developer. The conversation is about the whole project, or about one unit when you start it from a reservation, and it appears in your Inbox under the Projects filter, with the usual unread marker. A developer can message an agent from a reservation that agent made on their project, using Message the agent, and never an agent who muted them.

Only the agent and the developer can read the conversation, and no buyer is in it: a message that contains an email address or a phone number is refused. A message can be up to 4,000 characters, and you can send up to 60 messages an hour. You are told of a new message in the bell only, never by email.

From the Help Center: **How do new-development alerts and messages to a developer work?**

STEP BY STEP

1. Open your **Housing Market CRM** account.

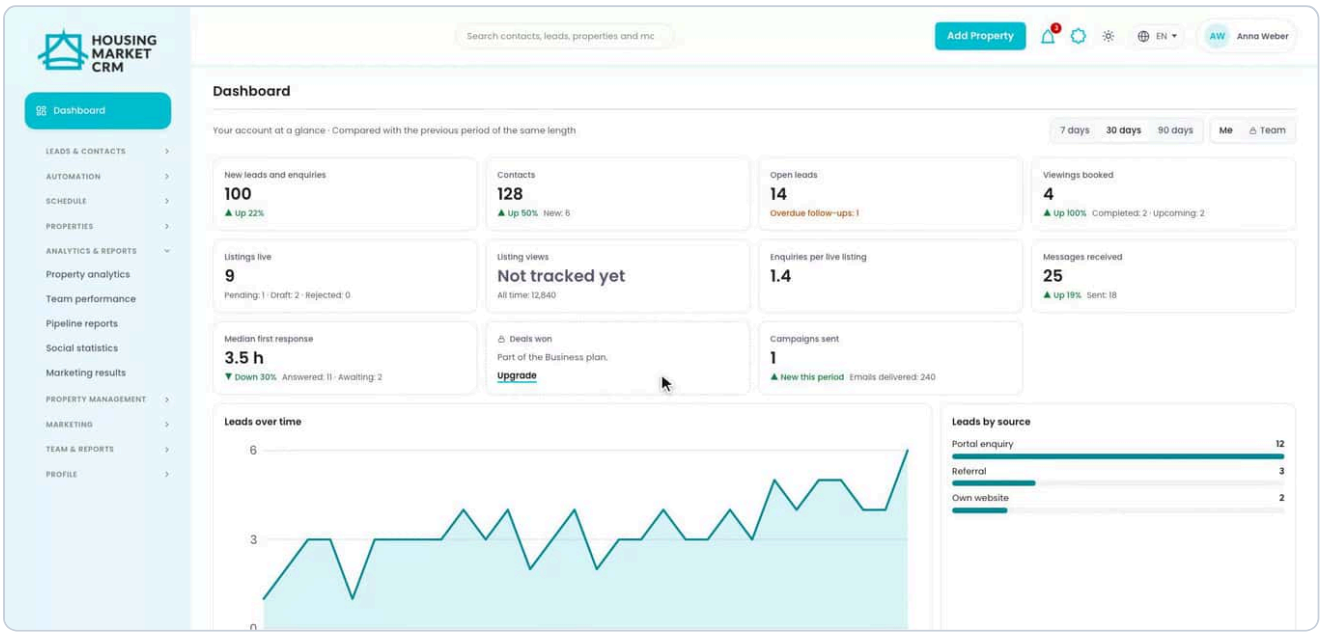


Figure 112.1 · Screen recorded 4 November 2026

2 Open **Properties** in the left menu.

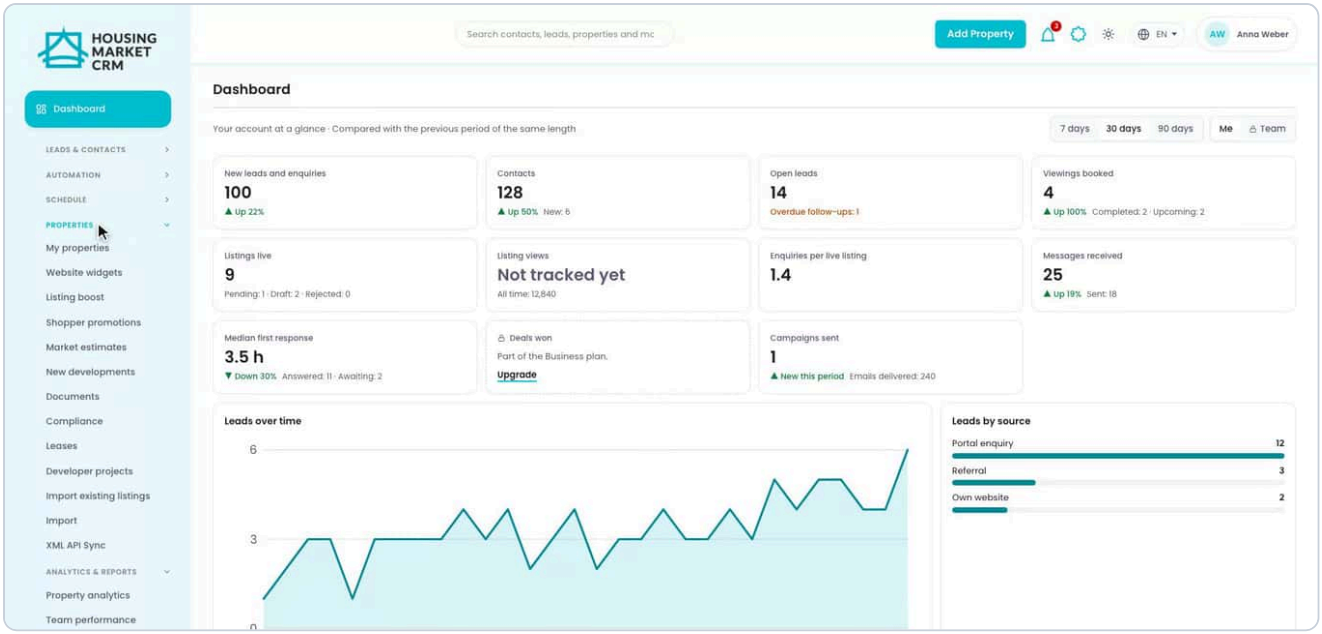


Figure 112.2 · Screen recorded 4 November 2026

3 Click **Developer projects**.

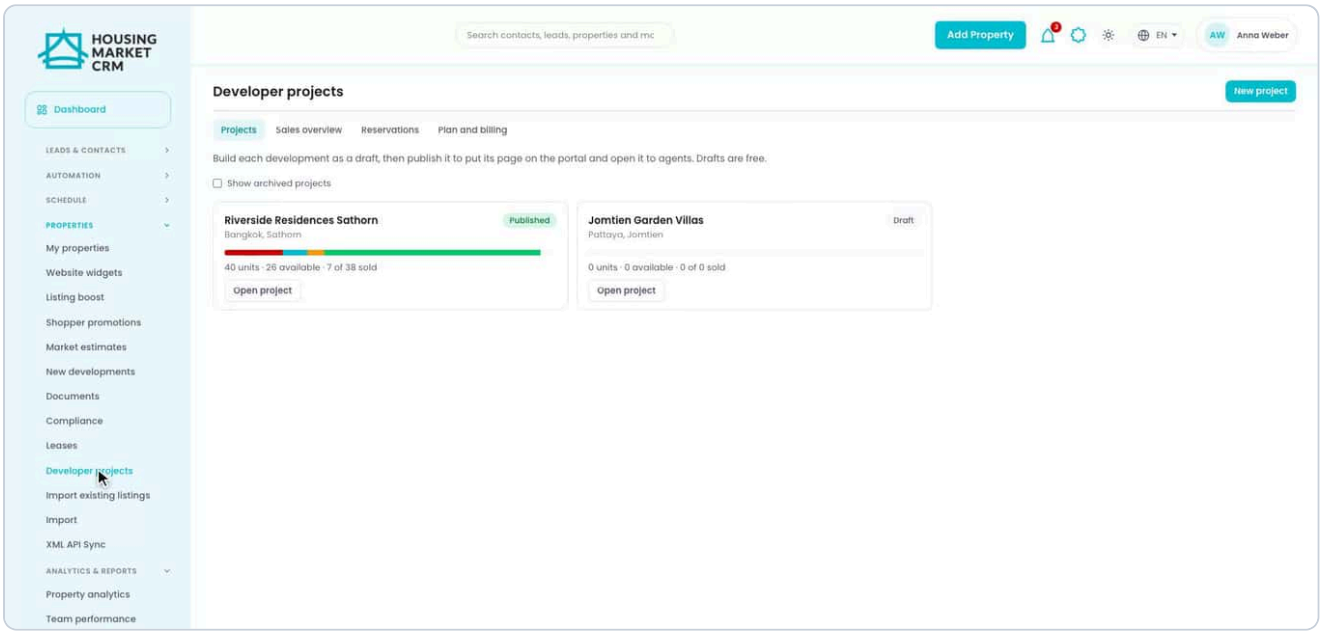


Figure 112.3 · Screen recorded 4 November 2026

4 Open a **draft** project.

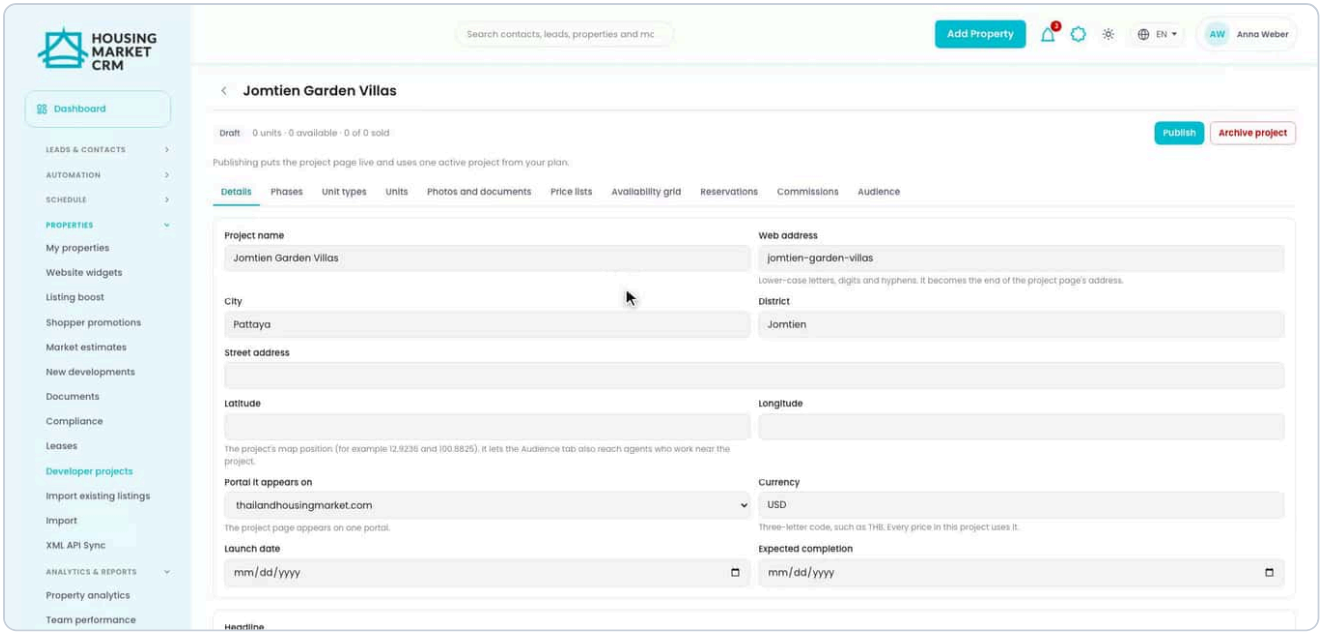


Figure 112.4 · Screen recorded 4 November 2026

5 Click **Audience**.

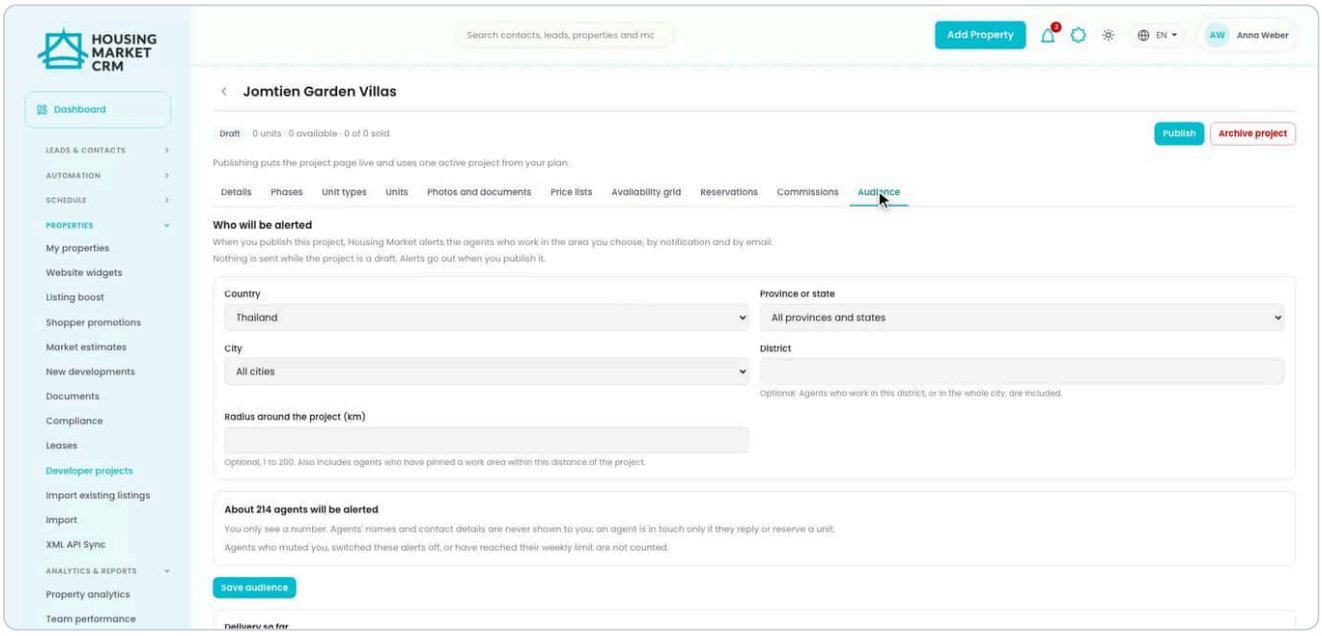


Figure 112.5 · Screen recorded 4 November 2026

6 Housing Market alerts the **agents who work in the area** you choose.

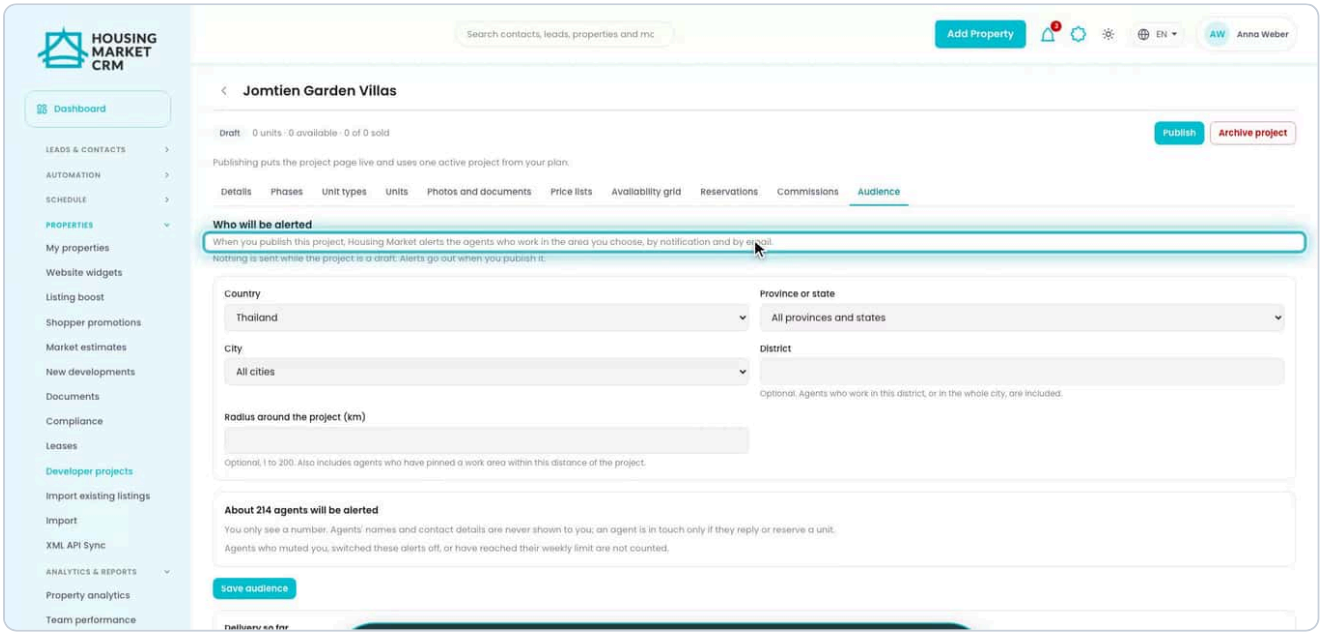


Figure 112.6 · Screen recorded 4 November 2026

7 Nothing is sent while the project is a **draft**.

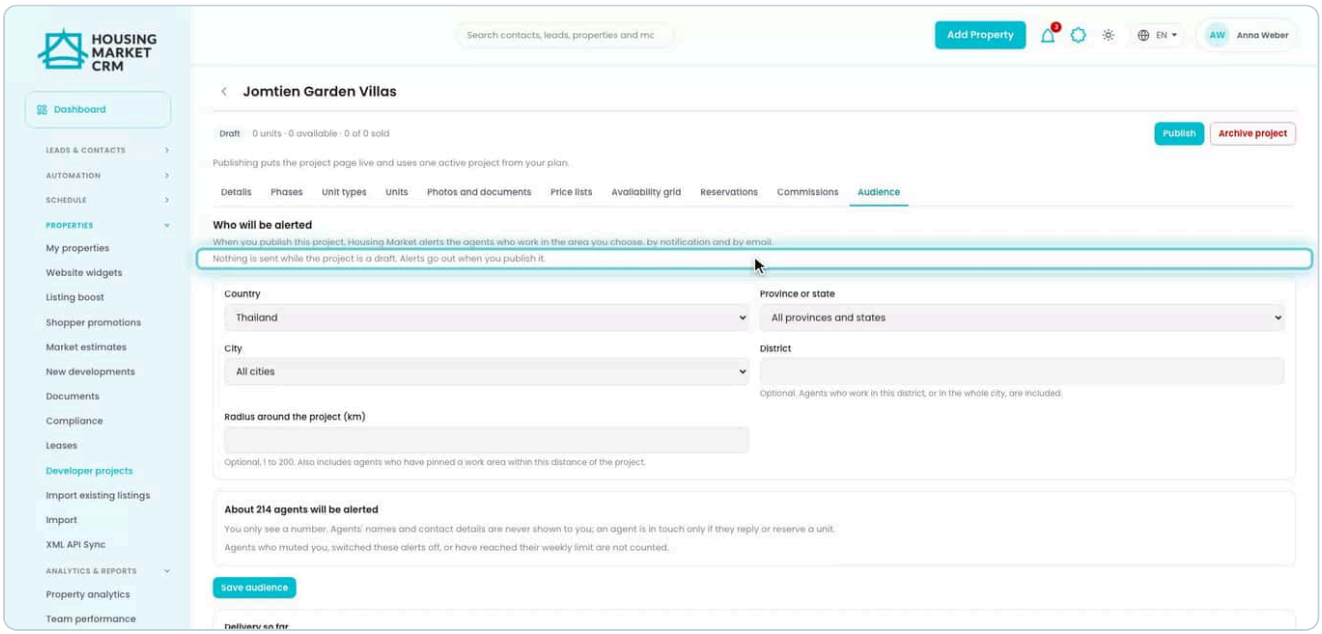


Figure 112.7 · Screen recorded 4 November 2026

8 Start with the whole country and read the **number**.

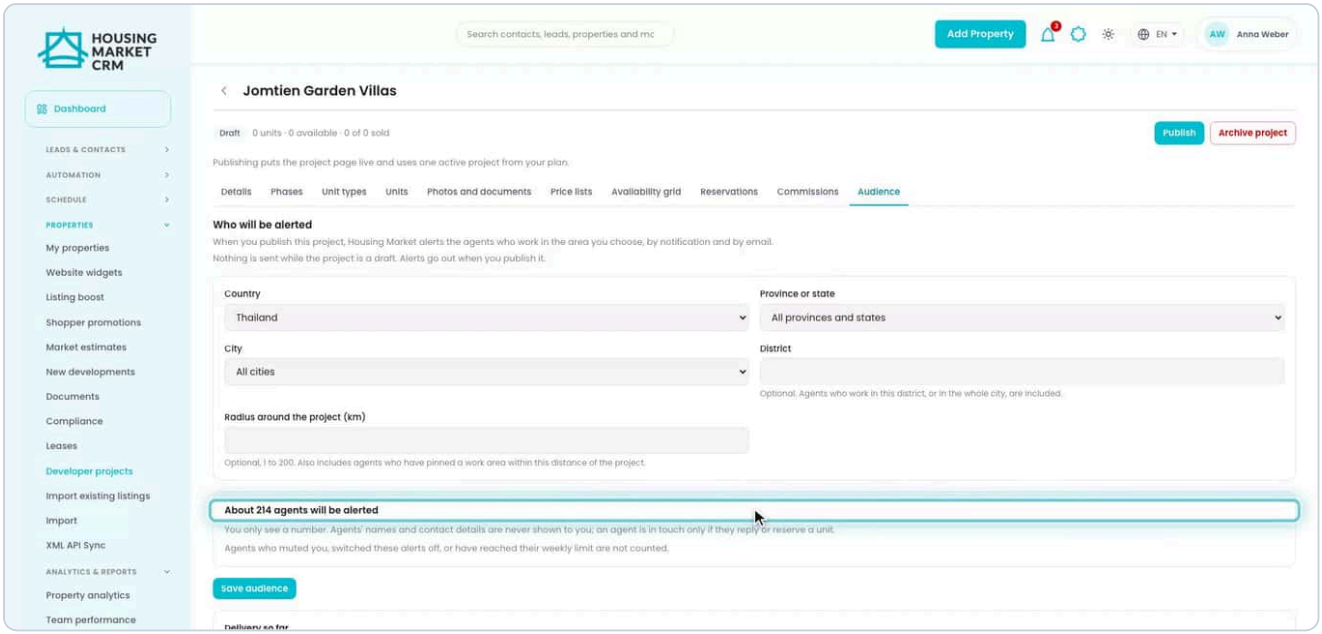


Figure 112.8 · Screen recorded 4 November 2026

9 Choose a **province** and a **city**.

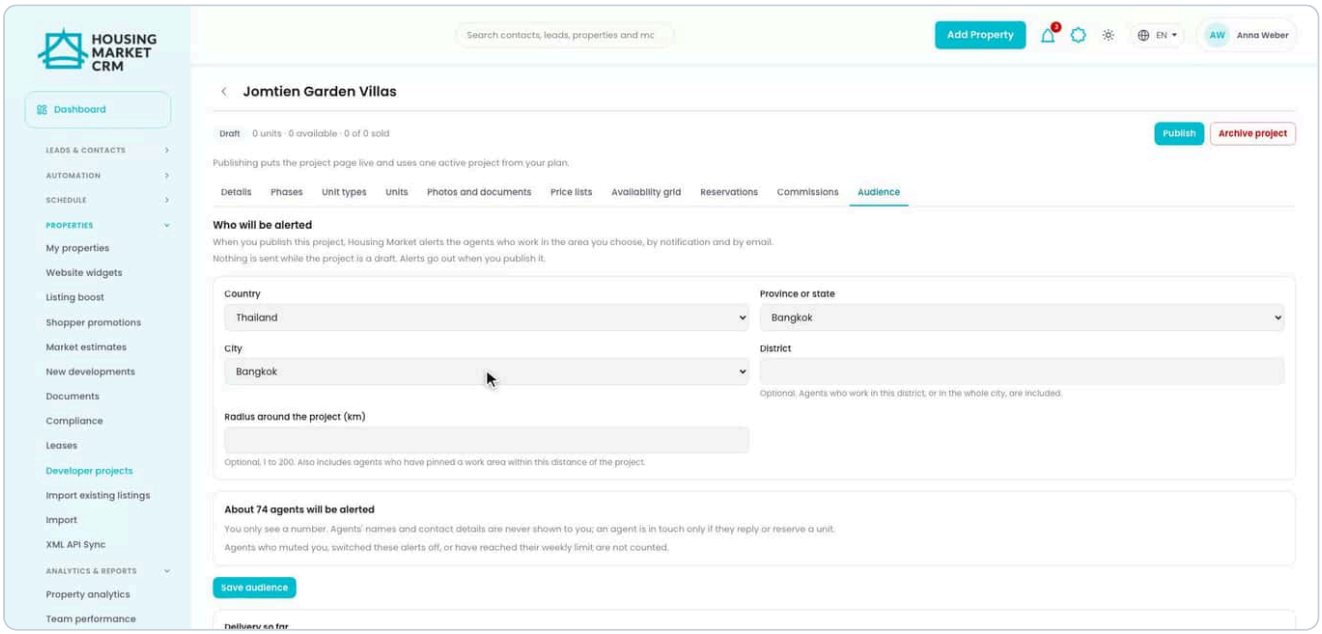


Figure 112.9 · Screen recorded 4 November 2026

10 Add a **district** if you like.

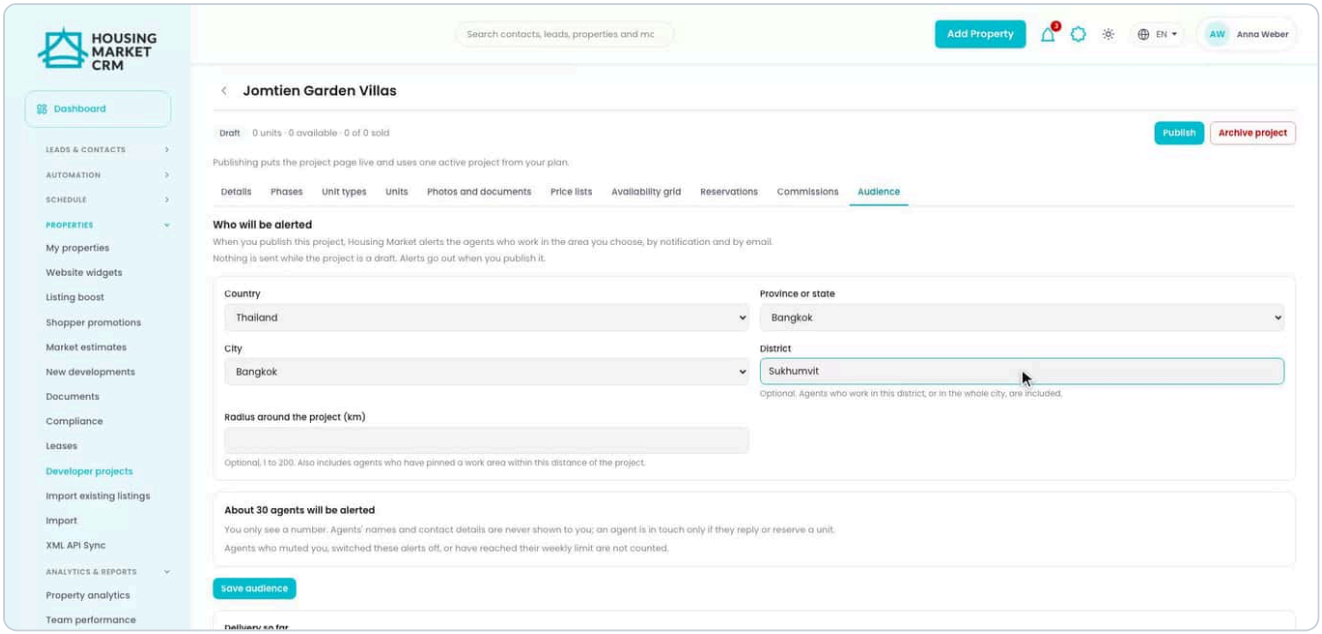


Figure 112.10 · Screen recorded 4 November 2026

11 A **radius** also includes agents who work within that distance.

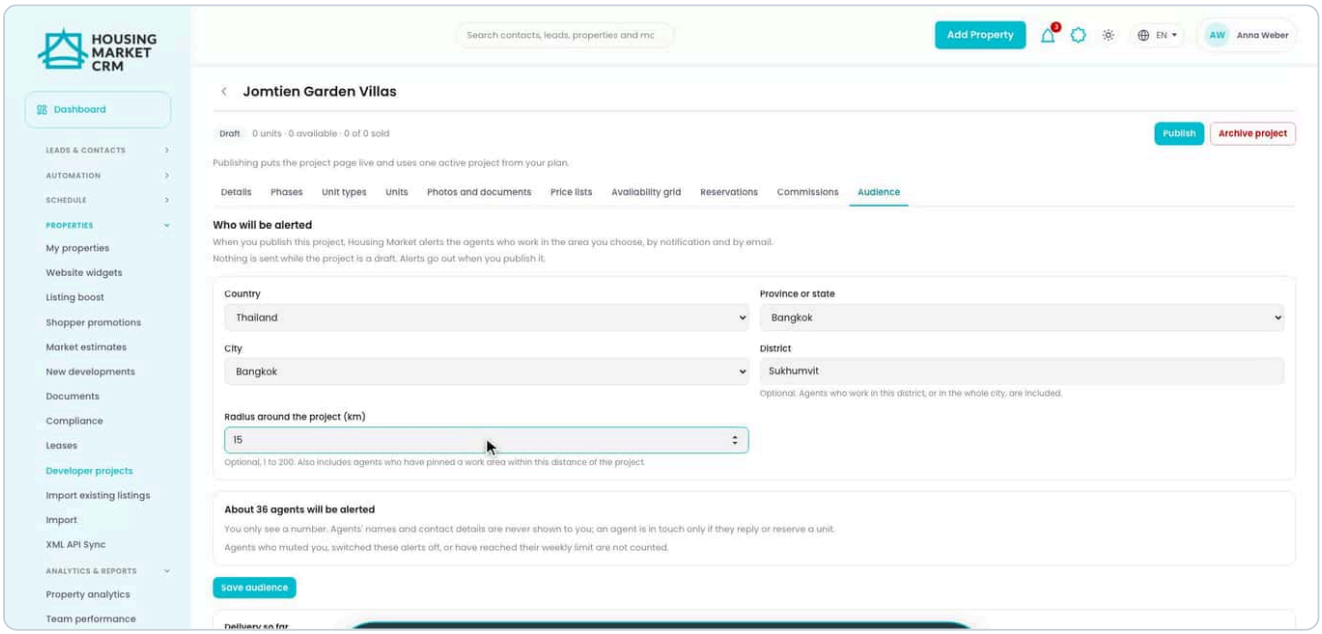


Figure 112.11 · Screen recorded 4 November 2026

12 The number follows your choices.

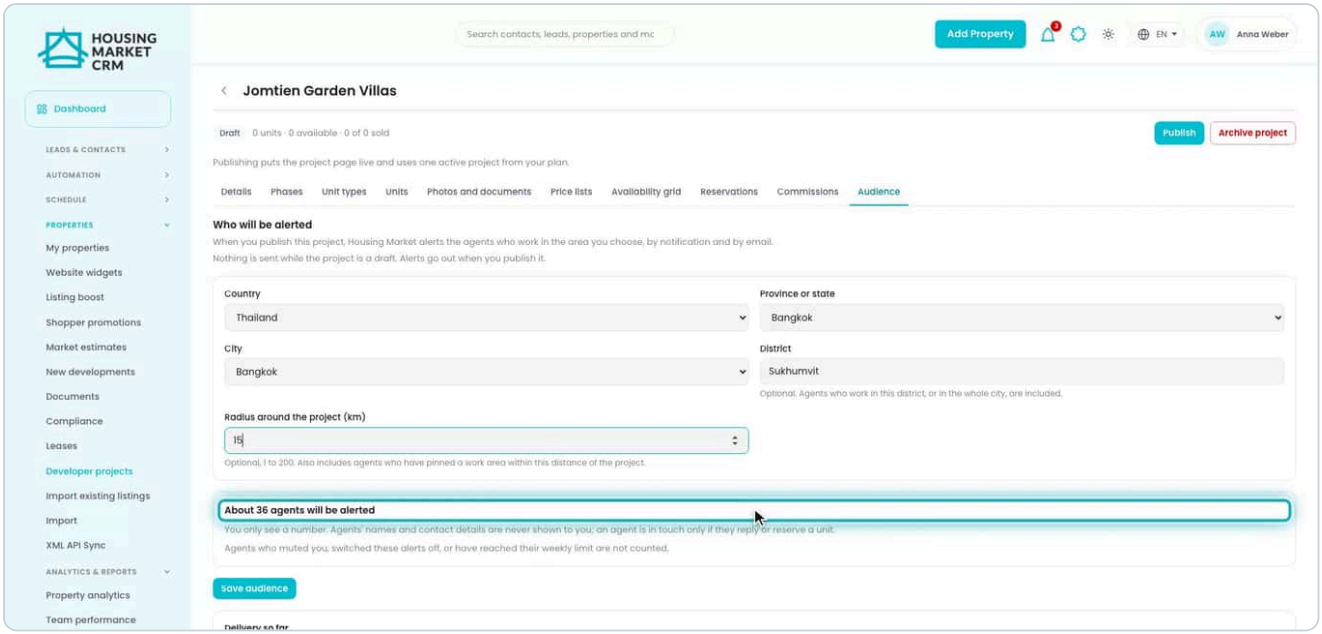


Figure 112.12 · Screen recorded 4 November 2026

13 You see **only a number**. Agents' names and contact details are never shown to you.

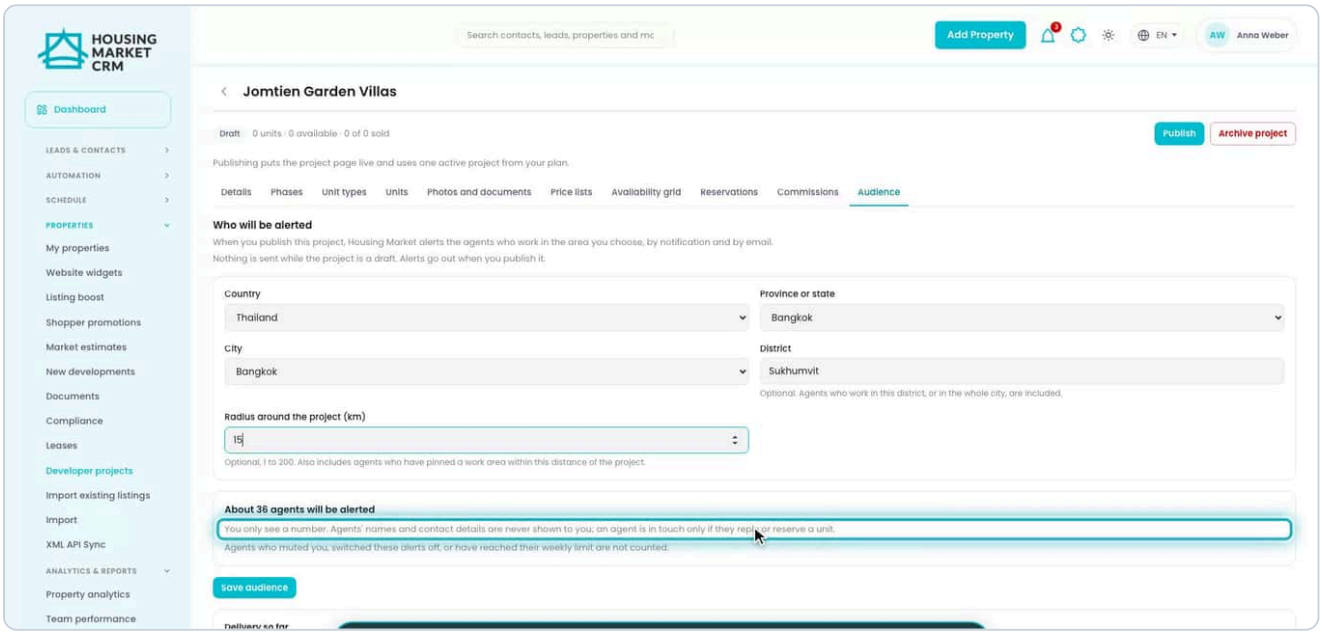


Figure 112.13 · Screen recorded 4 November 2026

14 Agents who **muted you** or switched alerts off are not counted.

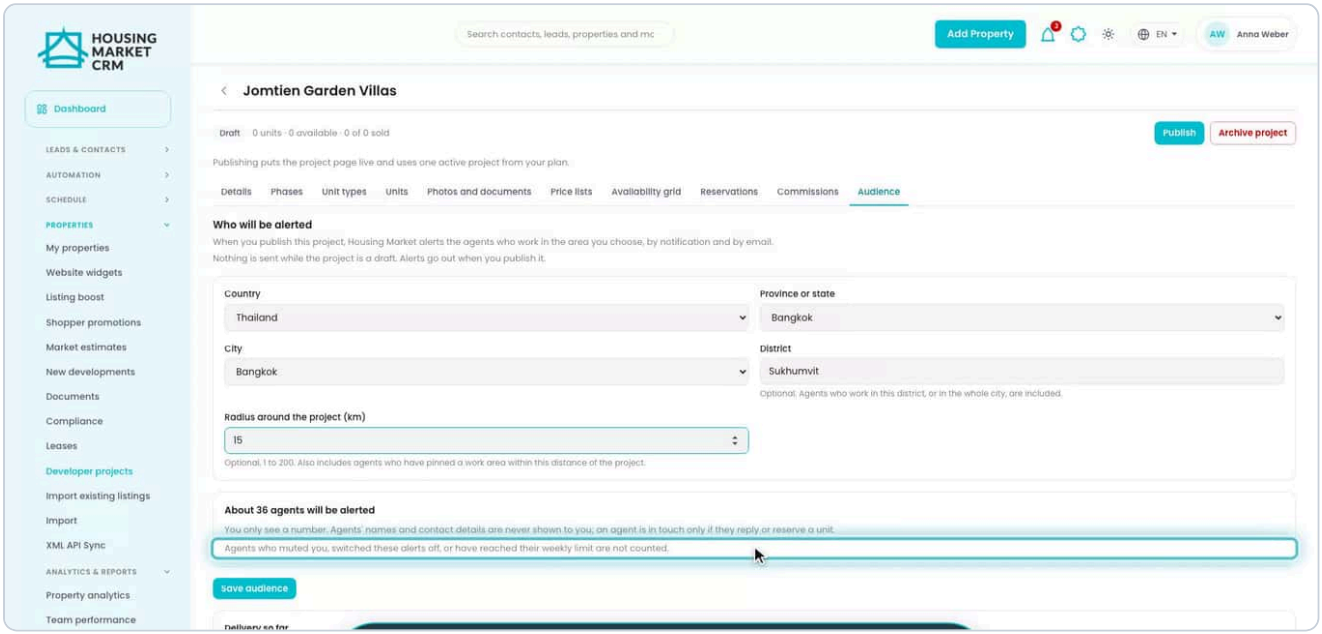


Figure 112.14 · Screen recorded 4 November 2026

15 Click **Save audience**.

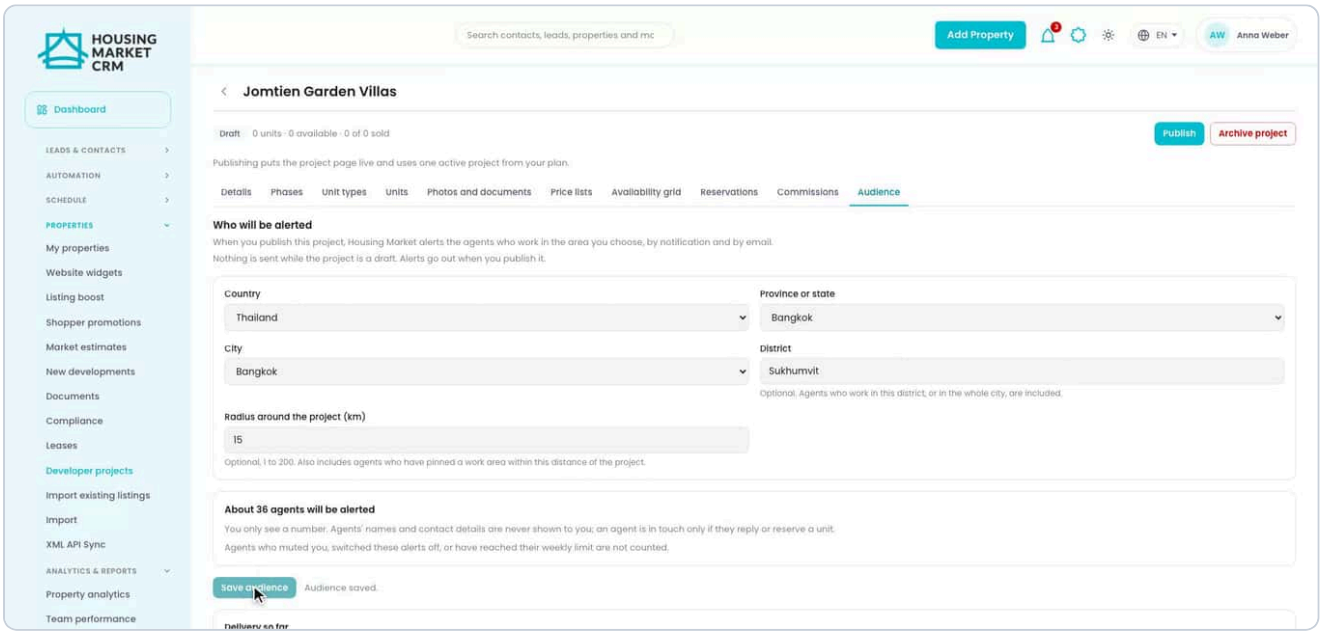


Figure 112.15 · Screen recorded 4 November 2026

16 The audience is **saved** for this project.

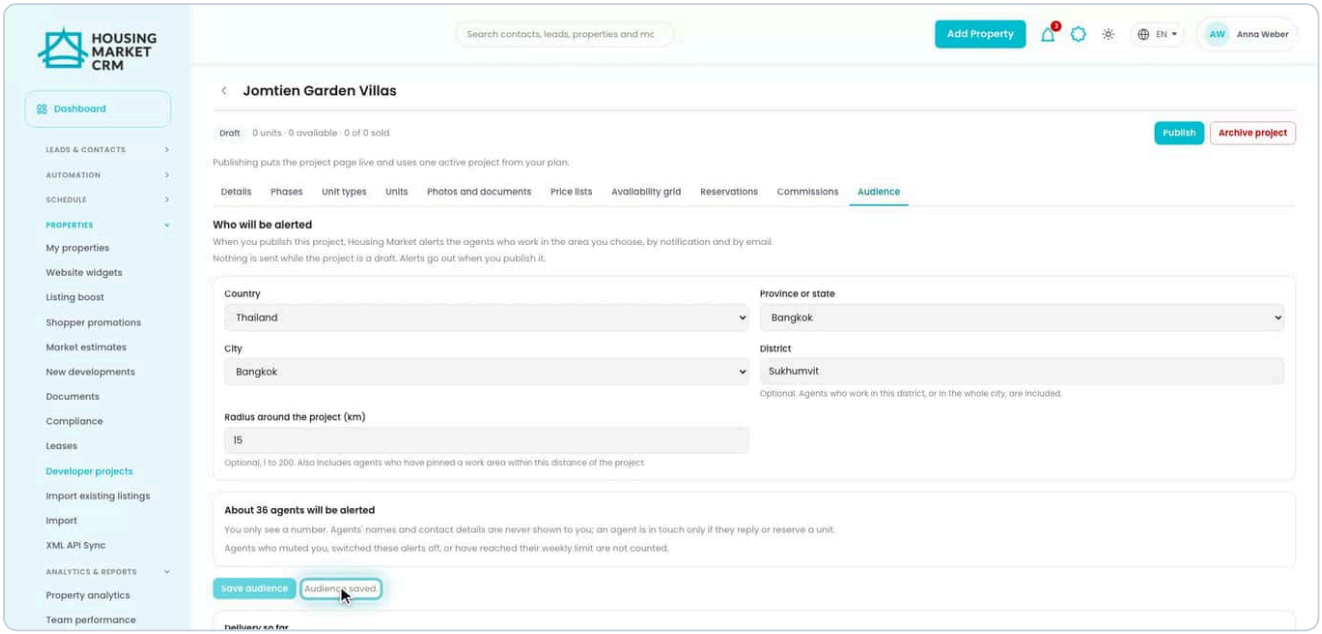


Figure 112.16 · Screen recorded 4 November 2026

17 After publishing, **Delivery so far** shows what was sent.

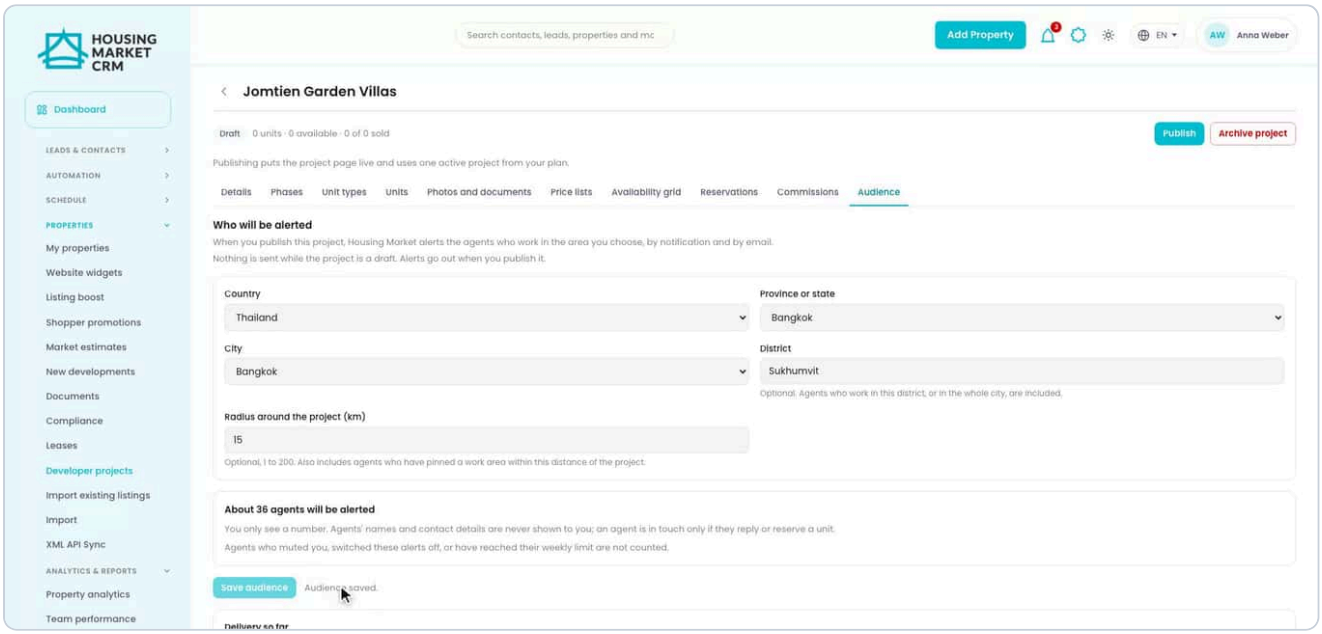


Figure 112.17 · Screen recorded 4 November 2026

18 One alert per project, per agent. Alerts go out **once**, when the project is first published.

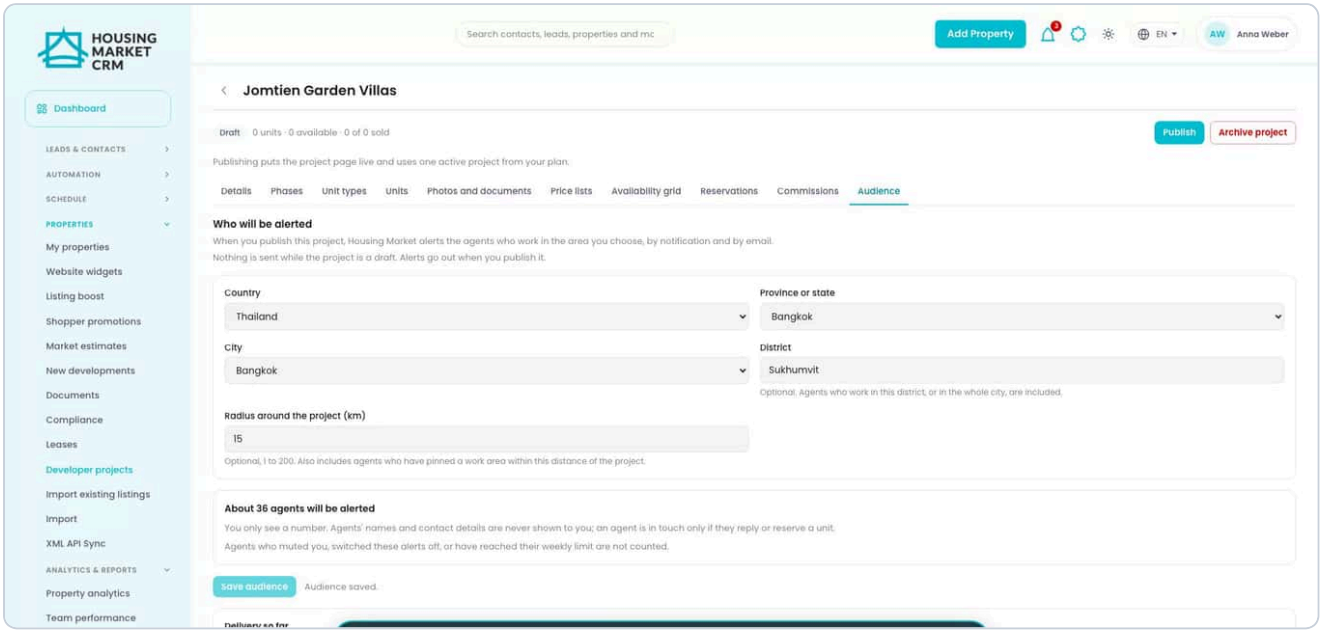


Figure 112.18 · Screen recorded 4 November 2026

113 CHAPTER 113

Choose which new development alerts you hear

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

When a developer publishes a new project, the agents who work in its area are alerted once, in the bell and by email. You choose your areas and can mute a developer. You can also message the developer about a project.

These features belong to the Developer Launch Platform (see "What is the Developer Launch Platform?"). The developer decides which agents hear about a project, and each agent decides which alerts they want.

For the developer: who will be alerted

In a project, open the Audience tab, Who will be alerted. Choose the country of the project and, if you like, a province or state, a city, a district, or a radius around the project of 1 to 200 km, which needs the project's map location. When you publish the project, Housing Market alerts the agents who work in that area, by notification and by email. Nothing is sent while the project is a draft.

You only see a number, About so many agents will be alerted. Agents' names and contact details are never shown to you, and an agent is in touch with you only if they reply or reserve a unit. Agents who muted you, switched these alerts off or have reached their weekly limit are not counted. Alerts go out once, the first time a project is published: editing the project or changing the audience later never sends a second alert, and the audience can no longer change once the project has been announced.

For the agent: choose which alerts you hear

Under Properties, New developments, open the Alerts tab. Countries switches off the countries you do not want alerts about. Where I work lists the places you work in, by country, province or state, city and district; developers choose agents by area, and with no area the country of your account is used. Developers lets you mute a developer, which stops their new project alerts while you can still browse their projects, and unmute them again at any time.

How you are told, the bell only, email only, both or off, and whether as they happen or in a daily summary, is set under Settings, Notifications, in New development alerts. The CRM sends at most one alert email a day and no more than three alerts a week to an agent; if several projects are published on the same day, you receive them together in one summary. Each email has a link to unsubscribe.

Message the developer

On a project that is open to agents, and on a reservation you made, choose Message the developer. The conversation is about the whole project, or about one unit when you start it from a reservation, and it appears in your Inbox under the Projects filter, with the usual unread marker. A developer can message an agent from a reservation that agent made on their project, using Message the agent, and never an agent who muted them.

Only the agent and the developer can read the conversation, and no buyer is in it: a message that contains an email address or a phone number is refused. A message can be up to 4,000 characters, and you can send up to 60 messages an hour. You are told of a new message in the bell only, never by email.

From the Help Center: **How do new-development alerts and messages to a developer work?**

STEP BY STEP

1. Open your **Housing Market CRM** account.

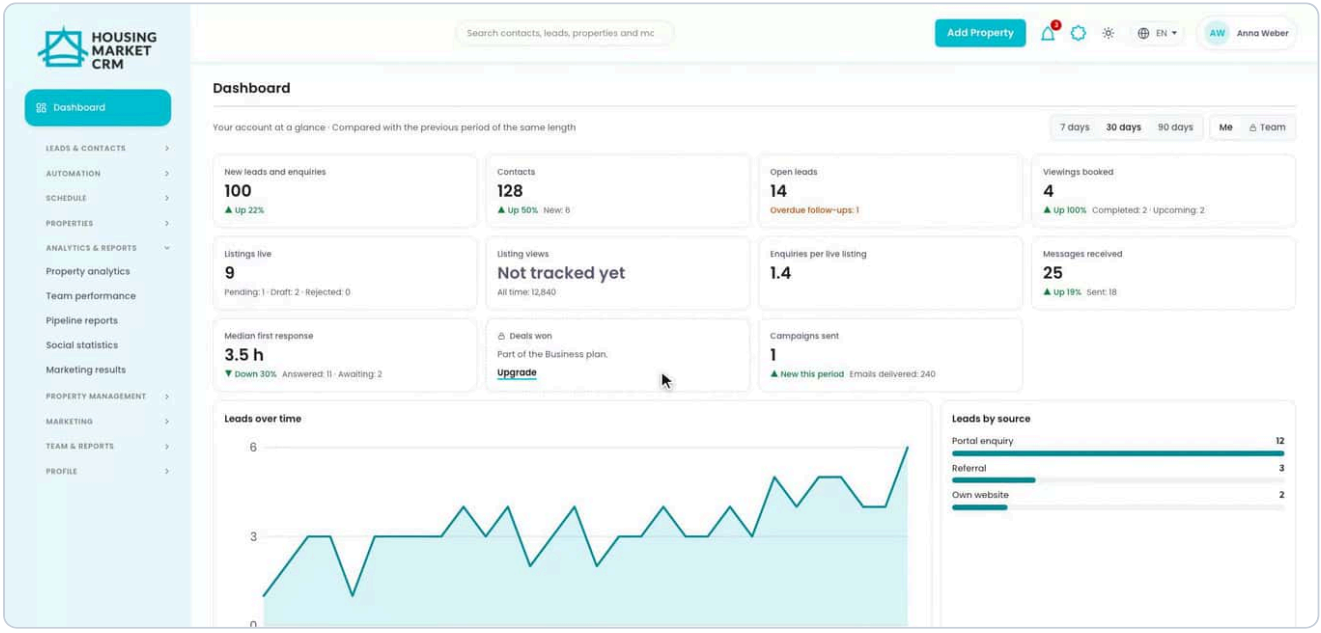


Figure 113.1 · Screen recorded 4 November 2026

2 Open **Properties** in the left menu.

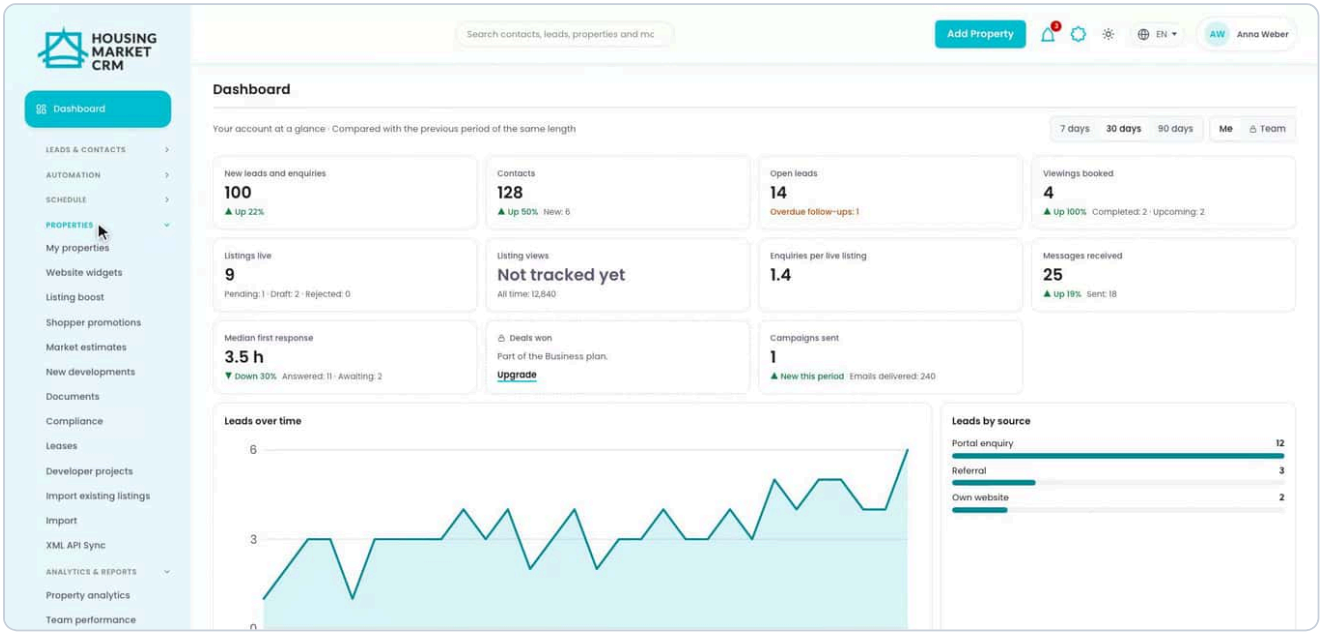


Figure 113.2 · Screen recorded 4 November 2026

3 Click **New developments**.

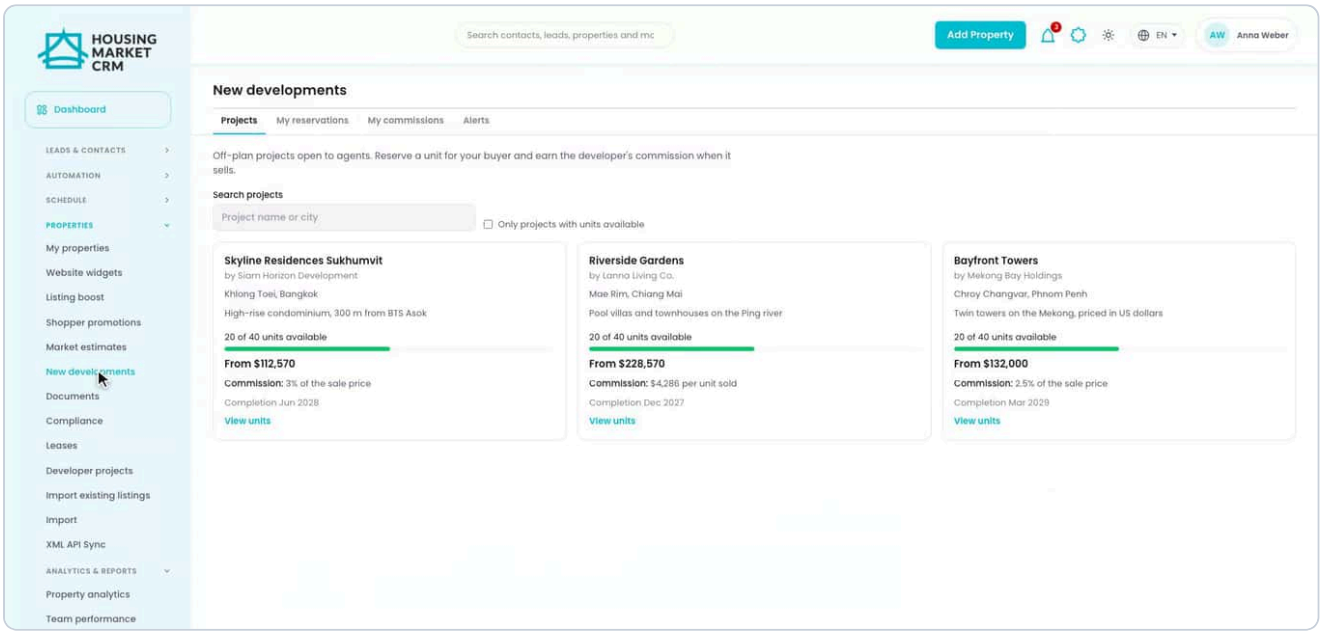


Figure 113.3 · Screen recorded 4 November 2026

4 Click **Alerts**.

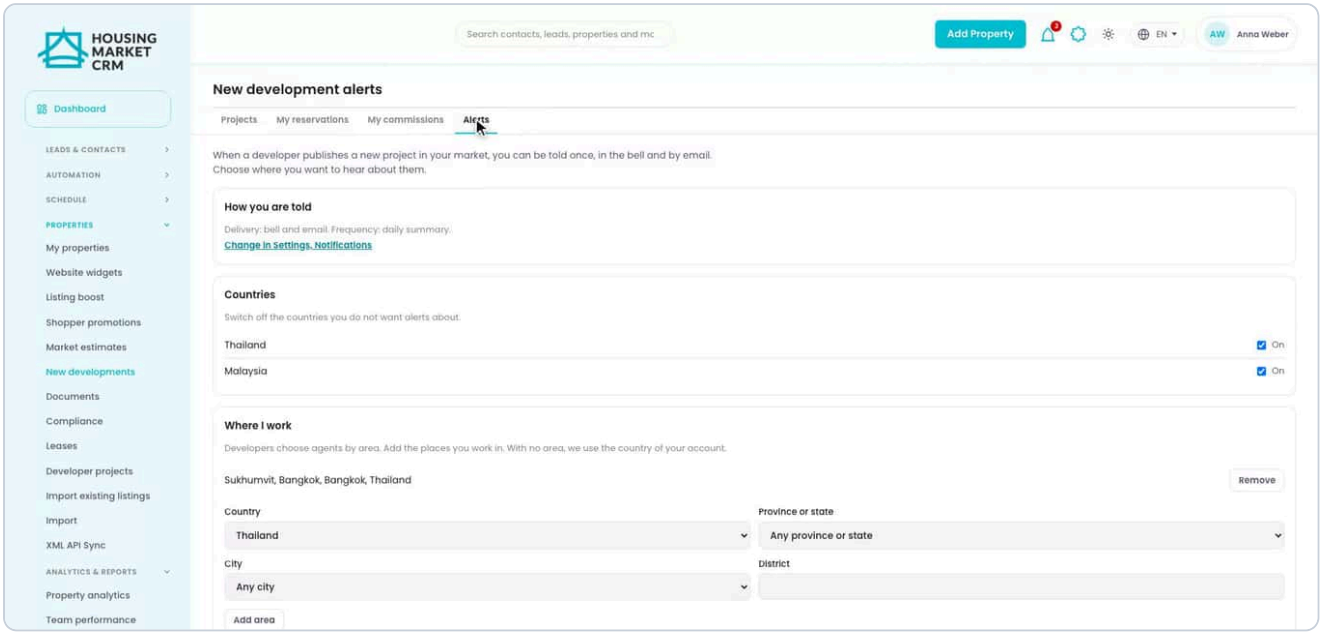


Figure 113.4 · Screen recorded 4 November 2026

5 When a developer publishes a **new project** in your market, you are told **once**.

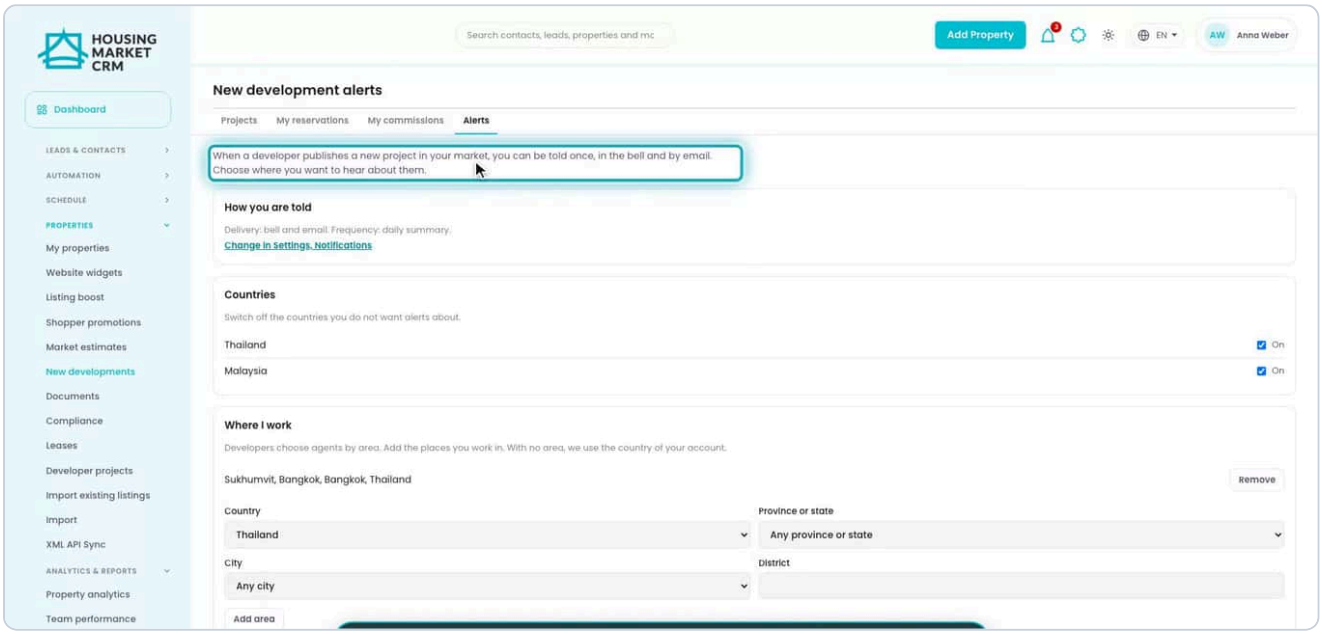


Figure 113.5 · Screen recorded 4 November 2026

6 Whether it comes in the **bell**, by **email** or both is set in **Settings**, then **Notifications**.

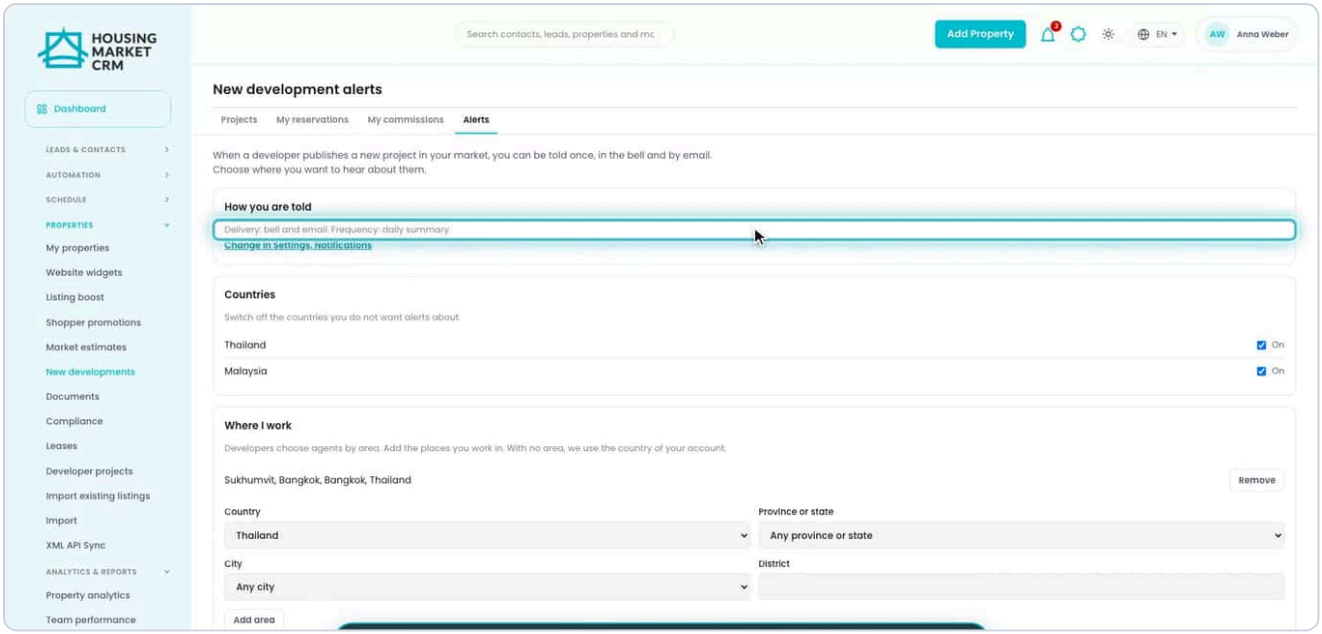


Figure 113.6 · Screen recorded 4 November 2026

7 Switch off the **countries** you do not want alerts about.

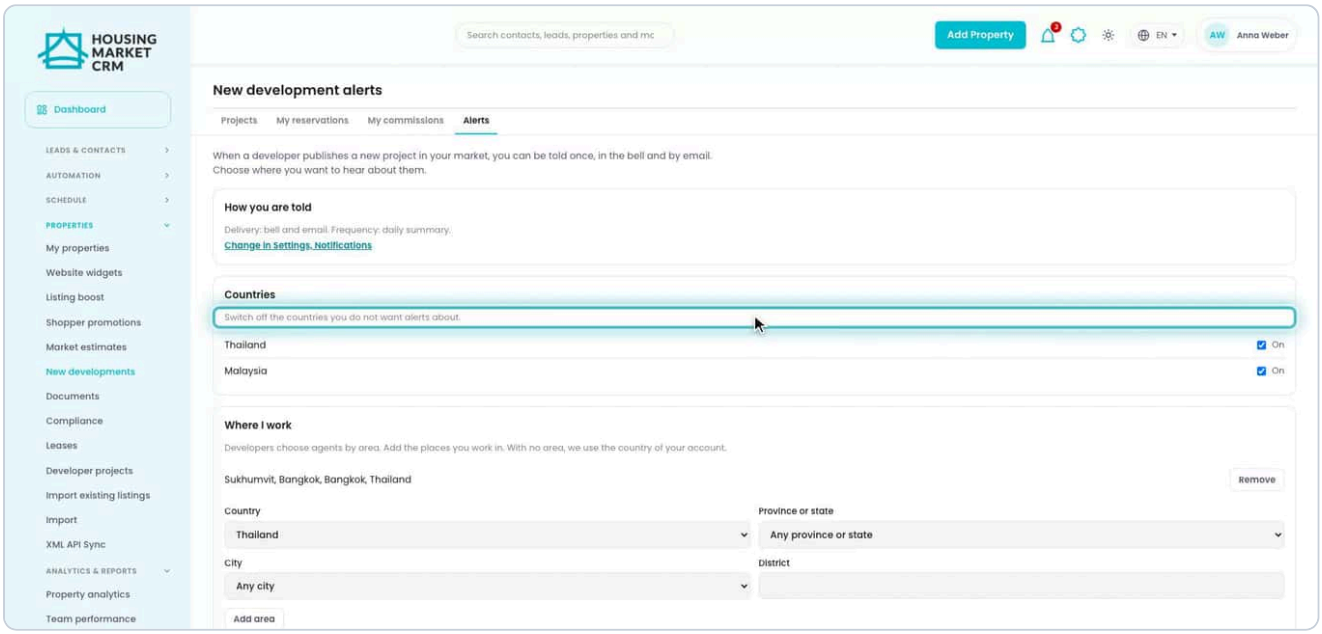


Figure 113.7 · Screen recorded 4 November 2026

8 Switch **Malaysia** off.

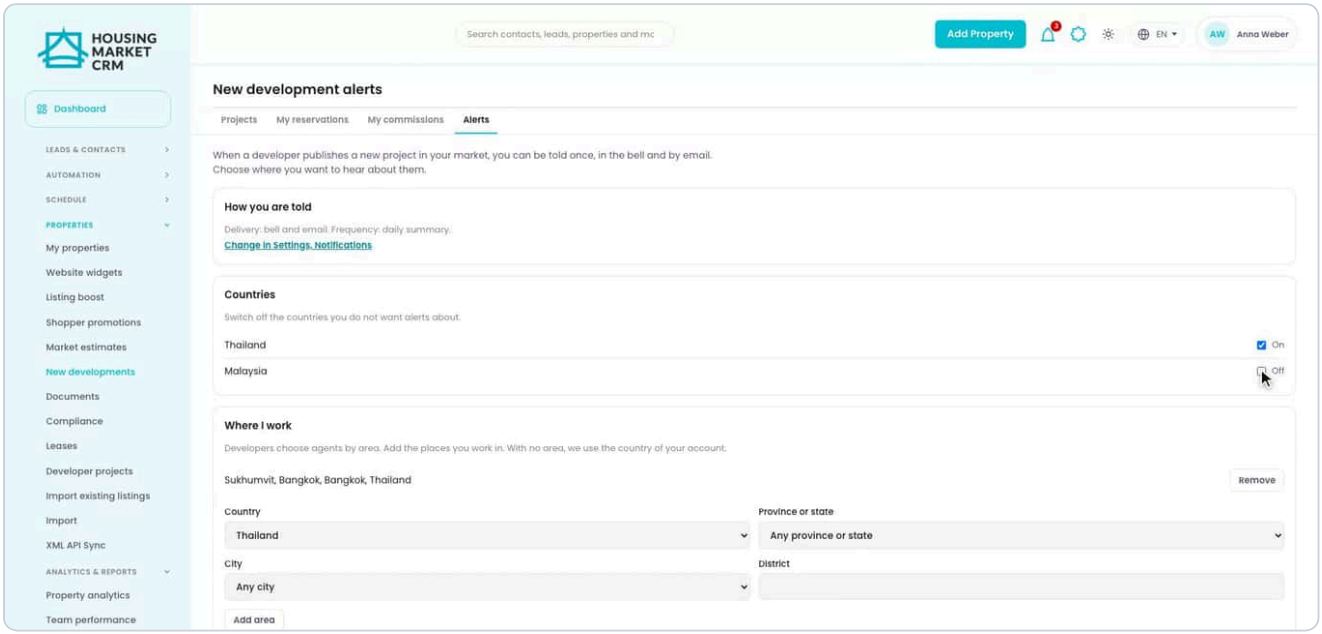


Figure 113.8 · Screen recorded 4 November 2026

9 Alerts for Malaysia are **off**.

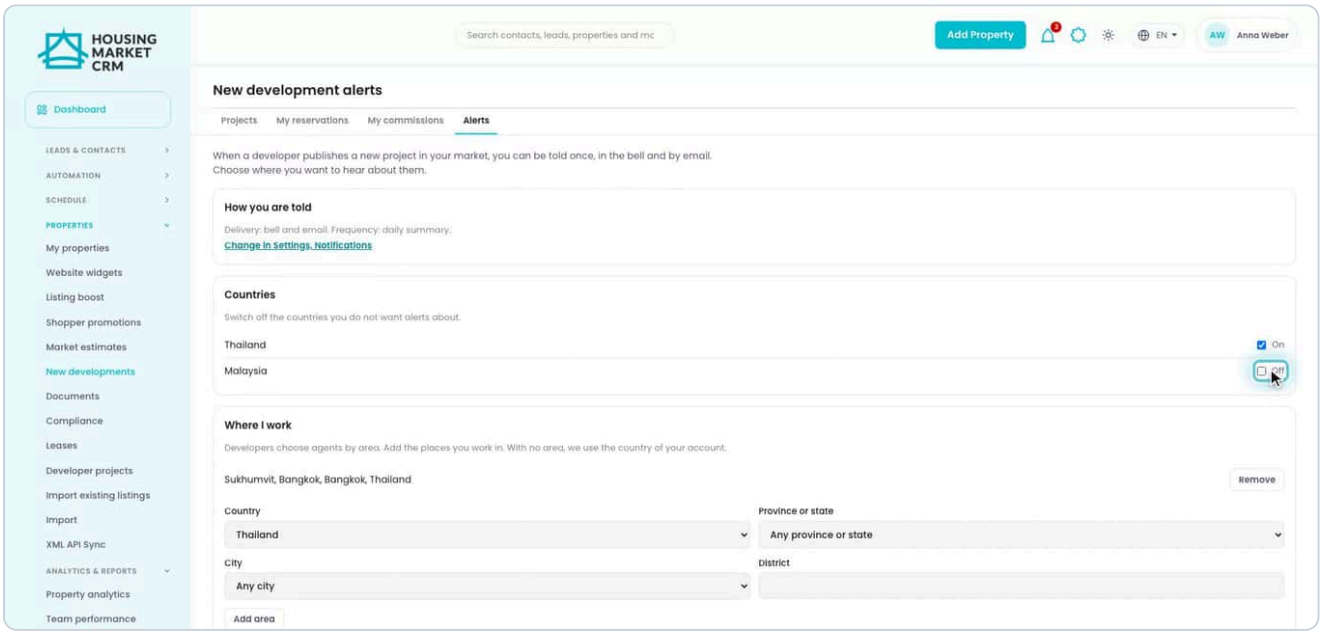


Figure 113.9 · Screen recorded 4 November 2026

10 Switch it back on whenever you like.

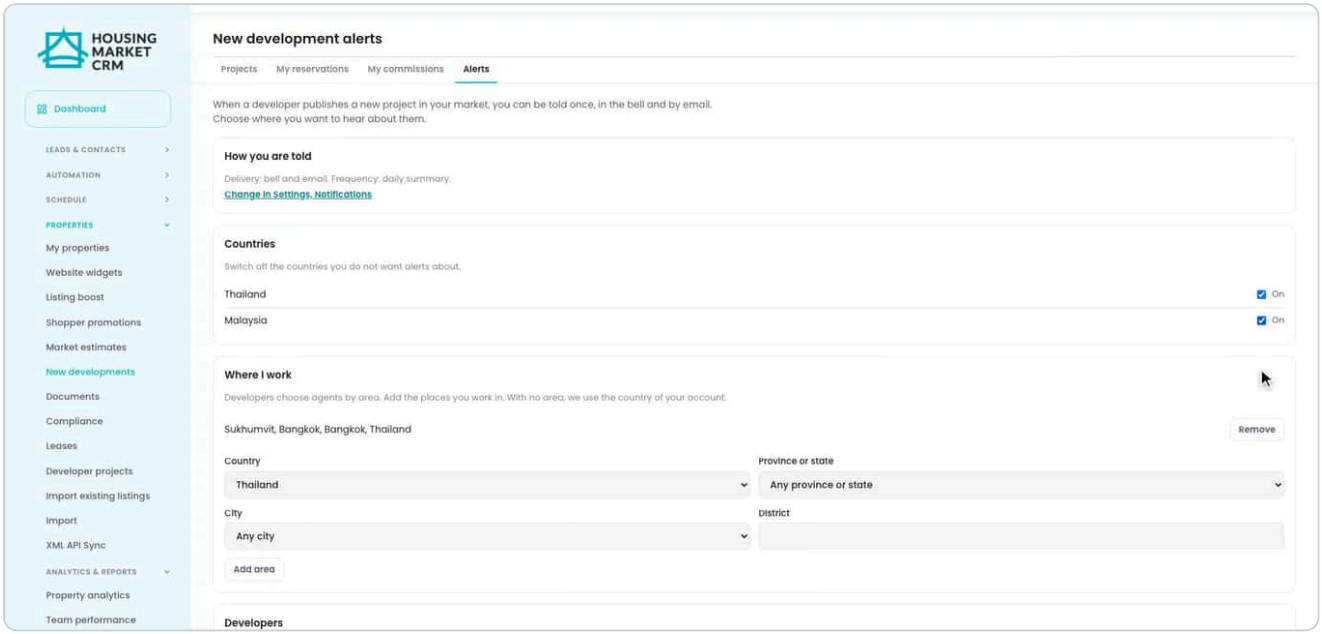


Figure 113.10 · Screen recorded 4 November 2026

11 Developers choose agents **by area**, so add the places you work in.

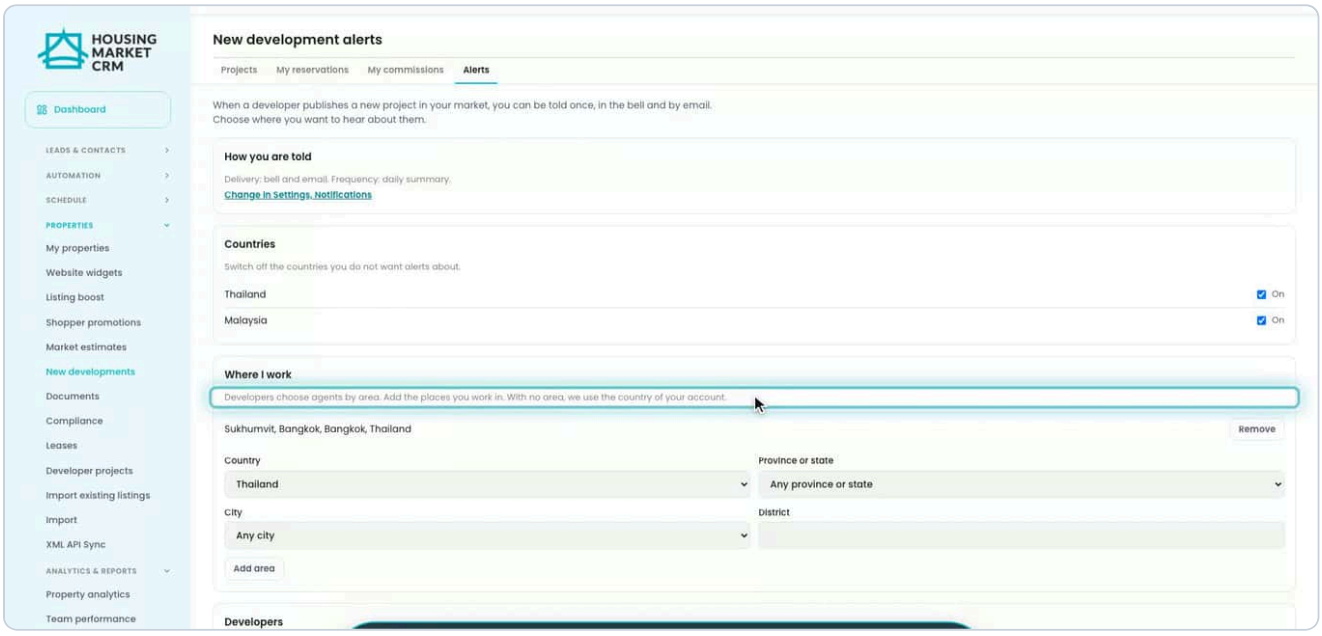


Figure 113.11 · Screen recorded 4 November 2026

12 This is one of your areas.

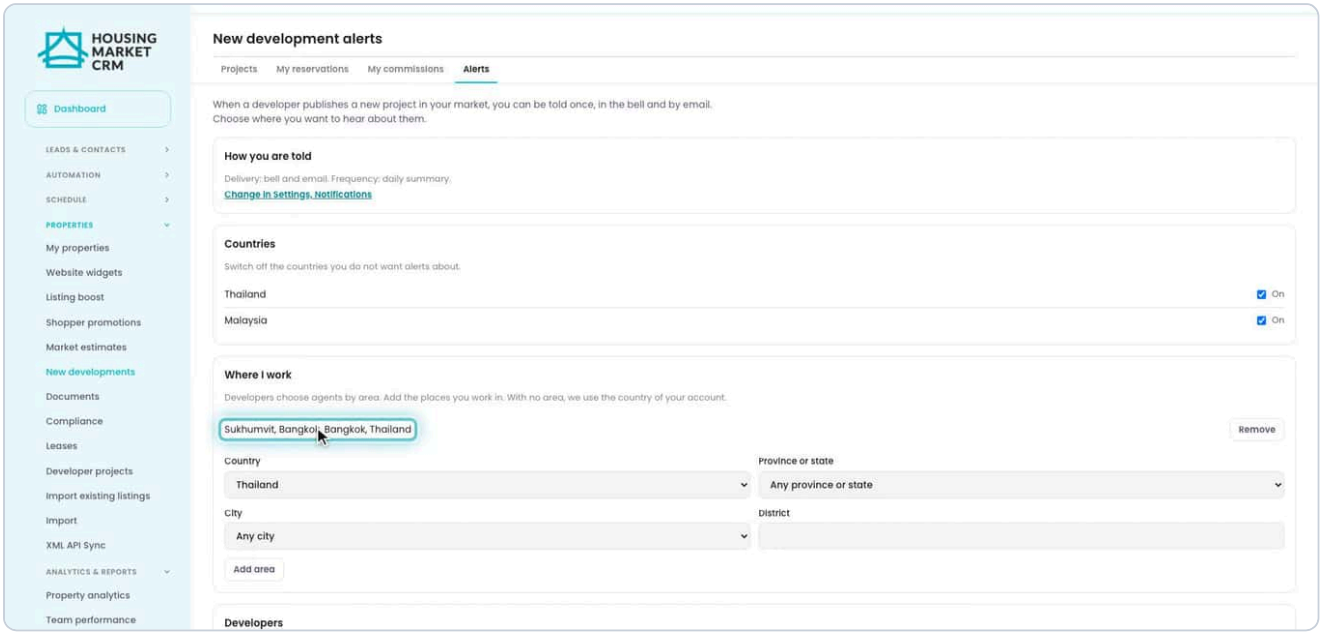


Figure 113.12 · Screen recorded 4 November 2026

13 To add another, choose a **country** a **province**.

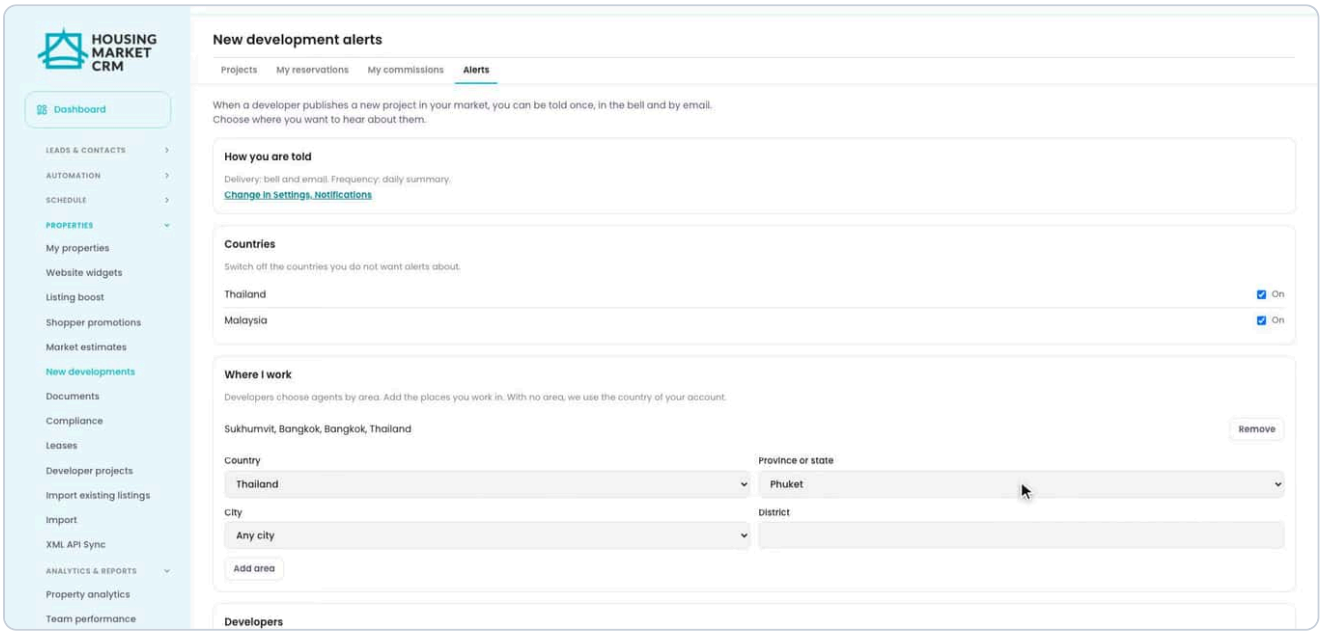


Figure 113.13 · Screen recorded 4 November 2026

14 and a **city**.

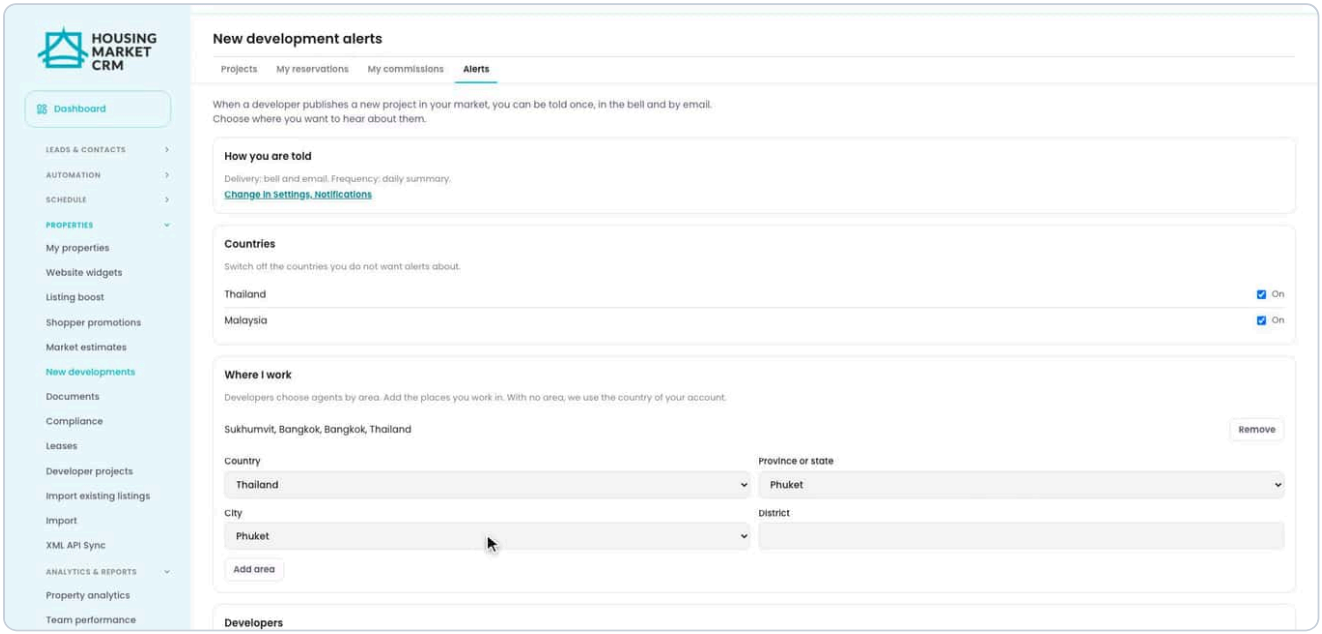


Figure 113.14 · Screen recorded 4 November 2026

15 Click **Add area**.

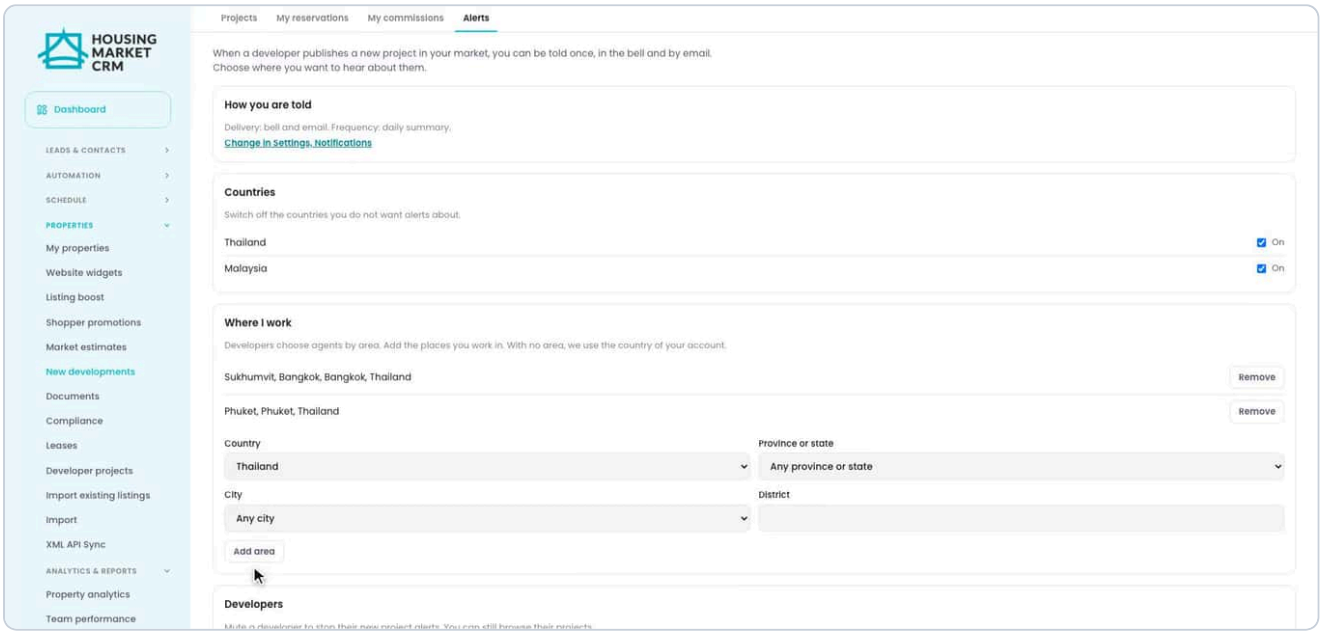


Figure 113.15 · Screen recorded 4 November 2026

16 **Mute** a developer to stop their alerts. You can still browse their projects.

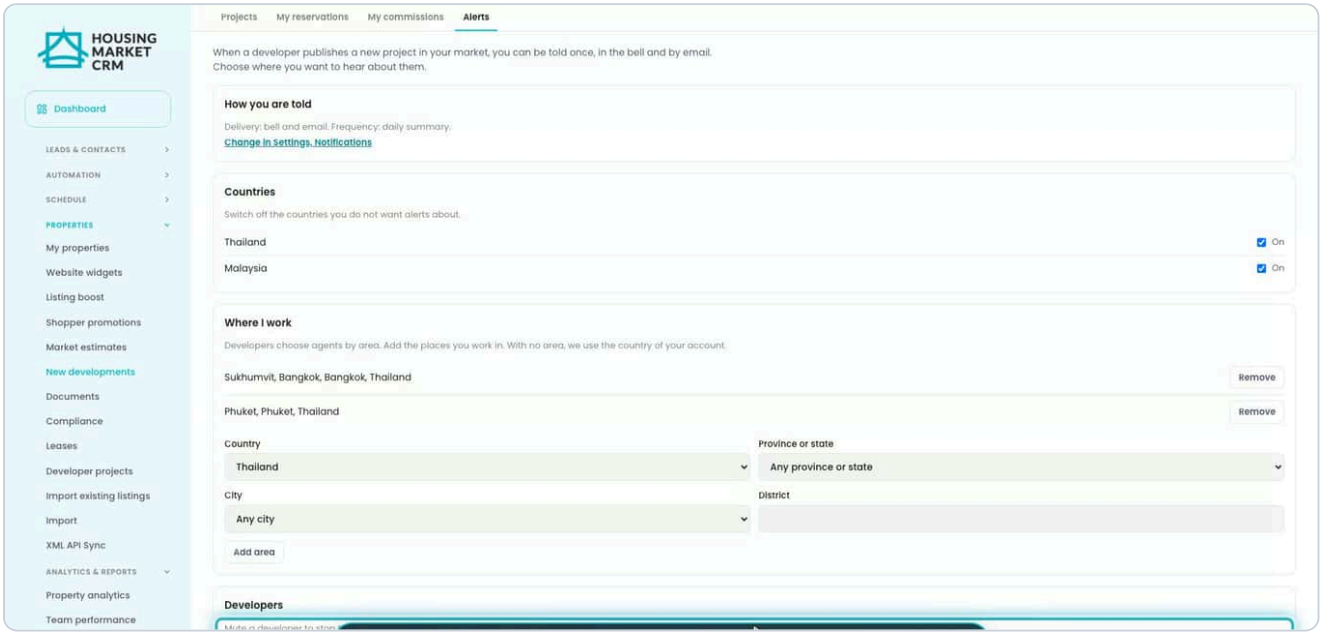


Figure 113.16 · Screen recorded 4 November 2026

17 Click **Mute**.

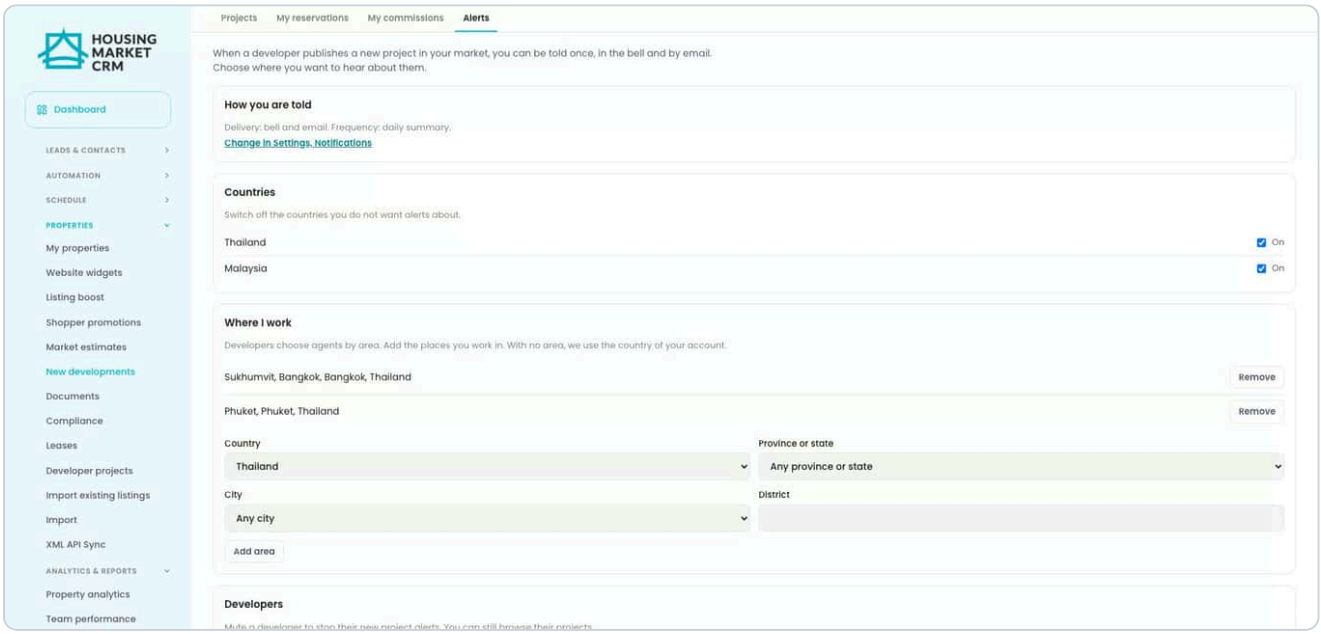


Figure 113.17 · Screen recorded 4 November 2026

18 The developer is **muted**.

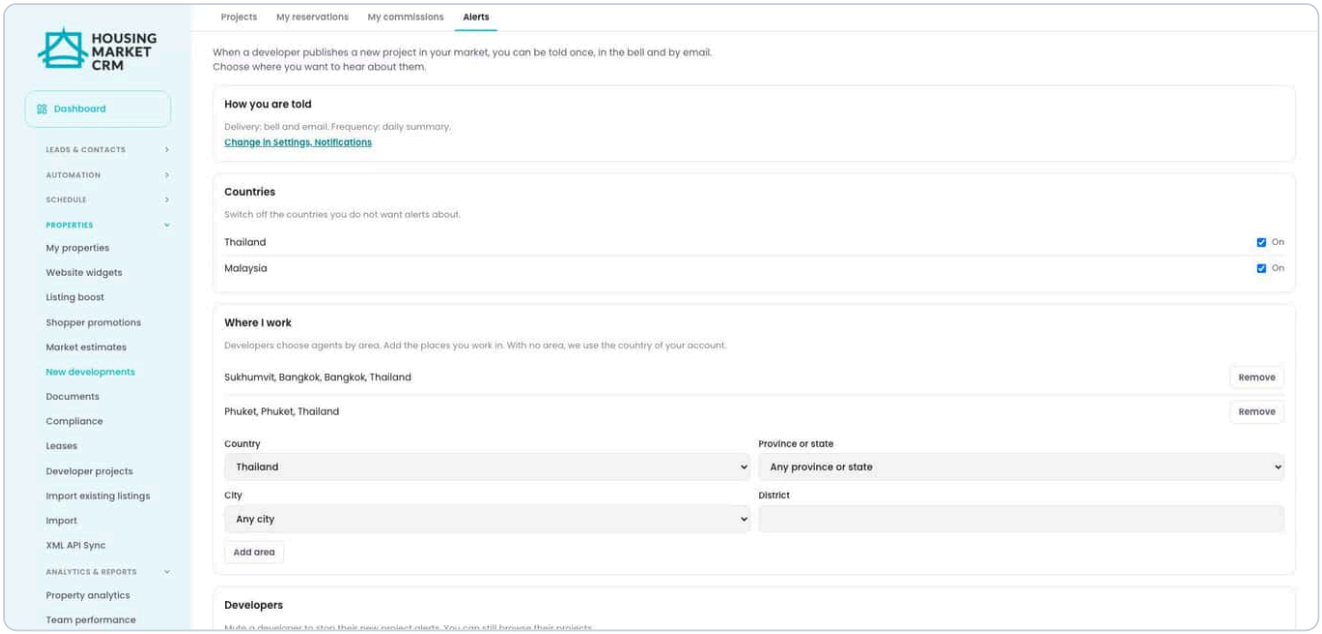


Figure 113.18 · Screen recorded 4 November 2026

19 Click **Unmute** to hear from them again.

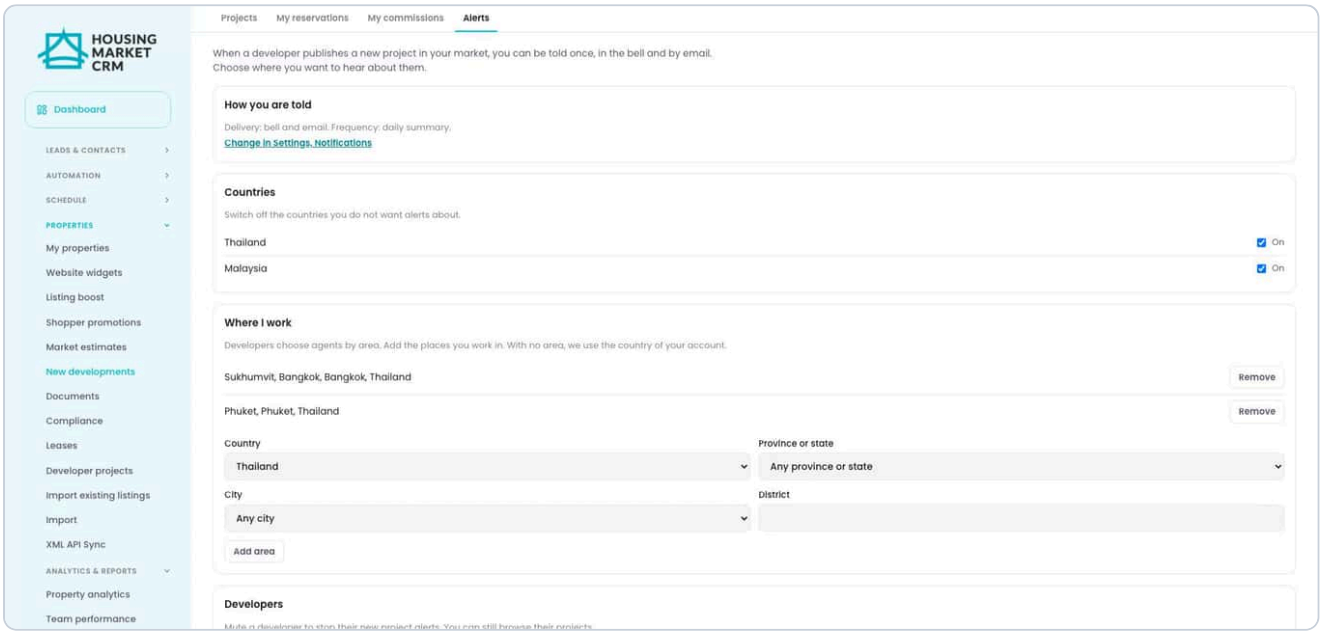


Figure 113.19 · Screen recorded 4 November 2026

20 New development alerts are **free** for every agent.

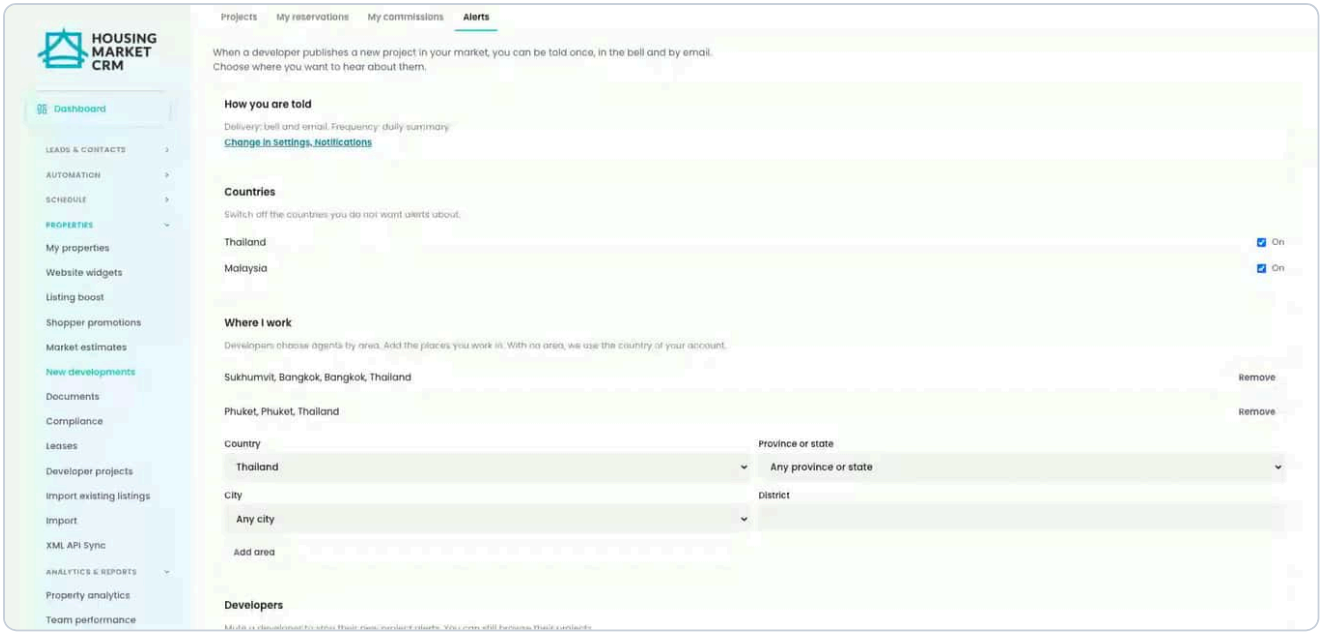


Figure 113.20 · Screen recorded 4 November 2026

PART 9

Property management

114 Manage rented homes

115 Track rent

116 Record a tenancy

117 Maintenance requests

118 Screen a tenant

119 Owner statements

120 Remind a tenant about rent

121 Send a work order to a contractor

122 Export an owner statement

123 Send a tenant applicant link

124 Housing Market Manager: run your rentals in one place

125 Automatic rent reminders for tenants

126 Rent reminders for tenants: manual and automatic

114 CHAPTER 114

Manage rented homes

Pro and Business | For agents | Watch the video

OVERVIEW

A register of the homes your agency looks after for other people: each unit, who owns it, and for how long. It is part of Pro and Business, and it is separate from the properties you are selling or letting.

Choose Property management in the menu. It holds the units your agency looks after on behalf of owners who are somebody else — "Units, owners and tenants for the properties your agency manages", as the page puts it.

Why it is not just another property

A property elsewhere in the CRM is something you are selling or letting, and it is finished when the deal is. A managed unit outlives every tenancy in it, changes hands between owners without becoming a different home, and exists whether or not it is advertised anywhere at the moment. That is why it is a register of its own rather than a flag on a listing.

Adding a unit

- Choose Add a unit.
- Give it a Name, and a Reference if your office uses its own codes for units.
- Choose the Owner from your contacts. A unit always has at least one.
- Choose Save.

Search units finds one again, and the counter above the list shows how many of your allowance you have used.

Owners, shares and a sale

Ownership is a period rather than a name on a card, which is what lets the register hold the two things that turn up immediately: a home owned by a couple, three siblings or two investors sixty-forty, and a home that changed hands on a date. When an owner sells, their period is ended on that date instead of being overwritten, so a statement for the months they owned it still addresses the person who owned it then.

Shares may add up to less than the whole — an agency managing a forty per cent share for one investor is a real arrangement — and never to more. Three thirds recorded as 33.33 each are accepted. An owner has to be a contact you can already see.

Archiving

Nothing here is deleted. A unit you have stopped managing is archived: Show archived finds it, Restore brings it back, and its ownership history is left exactly as it was. An archived unit gives its place back, so you never need to destroy a record to make room for a new one.

Plans and how many units

Property management is part of Pro and Business, and is never on the free plan. Pro and Business both include 10 units: it is sold by the units you manage rather than by the people in your office, so the plan you are on does not change the allowance. The counter on the screen and the server's own refusal read the same number, so the screen cannot promise room the account has not got.

If you are full, the CRM says so and says which of the two things is wrong — your plan does not include this, or your plan is right and your account is full. Larger packs are published and cannot be bought online yet; see "How many units can I manage, and what do the unit packs cost?".

The rest of the module

The register is the first of six screens under Property management, and each of the others has an answer of its own: Rent tracking, Tenancies, Maintenance, Tenant screening and Owner statements. All six are part of Pro and Business and none of them is on the free plan.

Rent is tracked here and never collected. See "Does Housing Market collect rent from my tenants?".

From the Help Center: **What is Property management in the CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

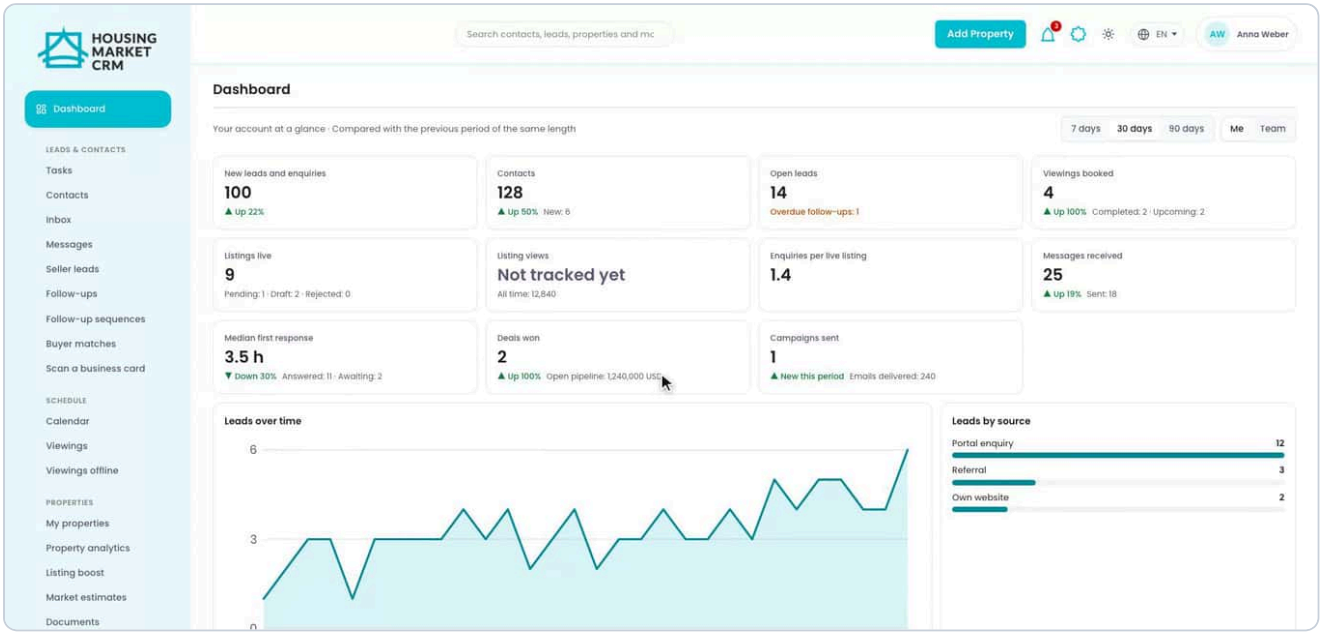


Figure 114.1 · Screen recorded 8 October 2026

2 Click **Property management** in the left menu.

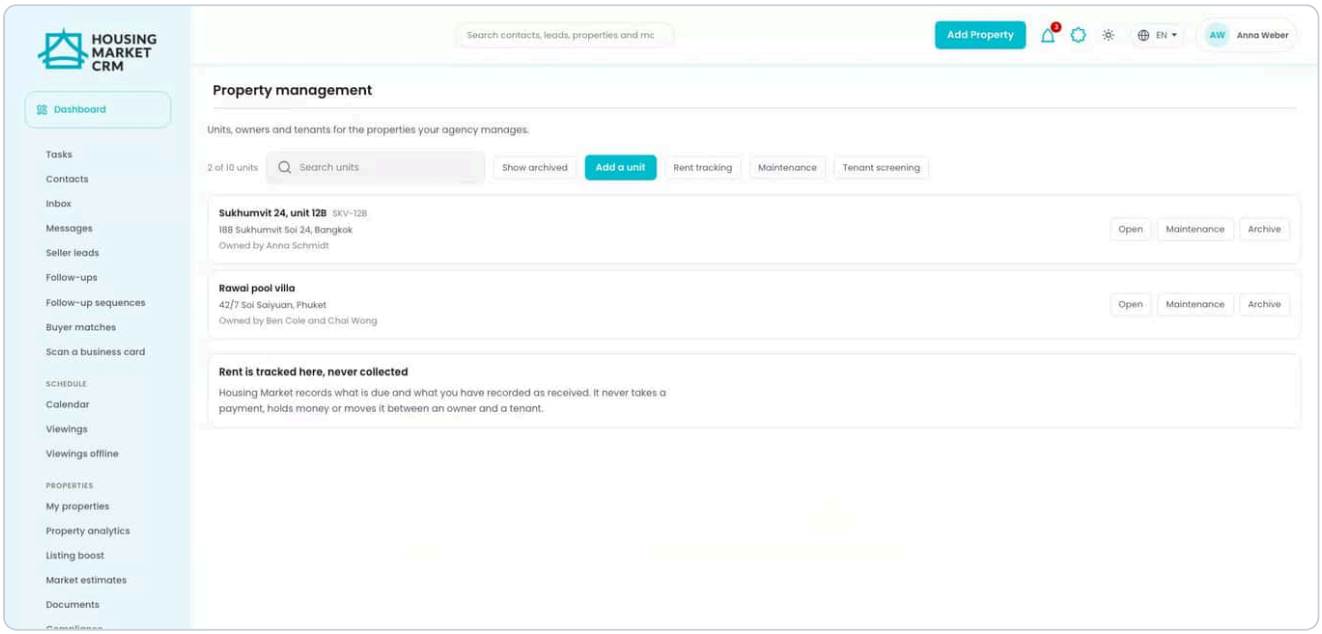


Figure 114.2 · Screen recorded 8 October 2026

3 Rent is **tracked** here. Housing Market never collects it.

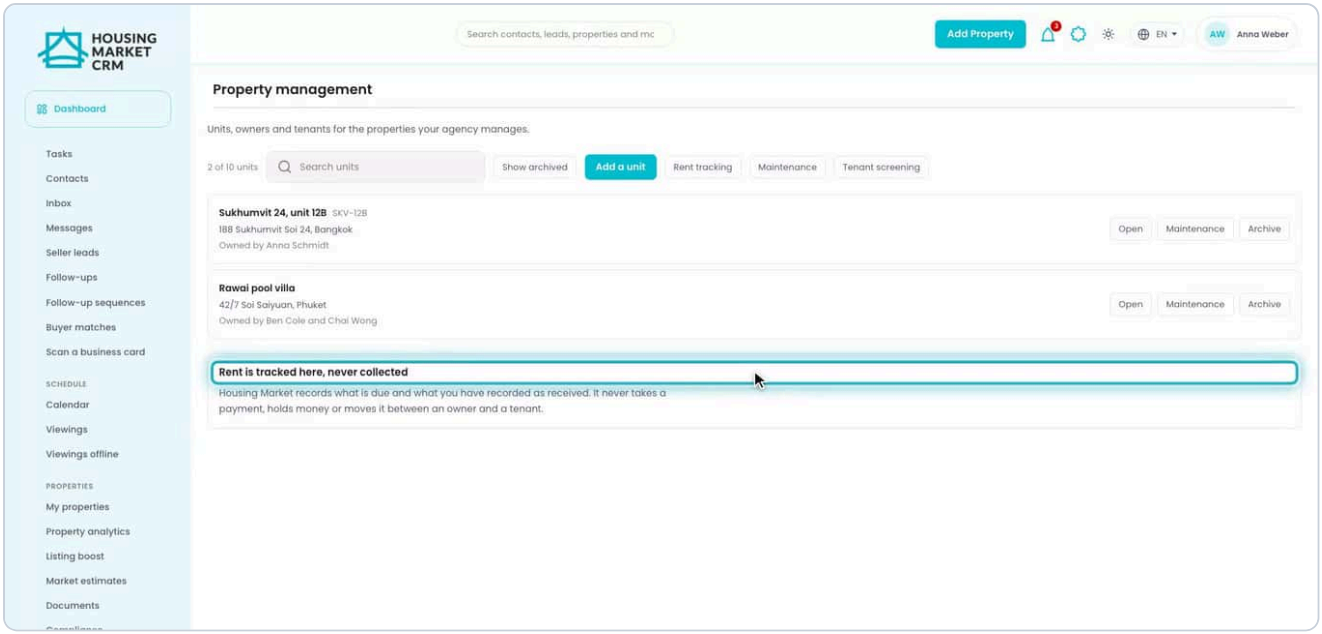


Figure 114.3 · Screen recorded 8 October 2026

4 Each home, who owns it, and **what share** each owner holds.

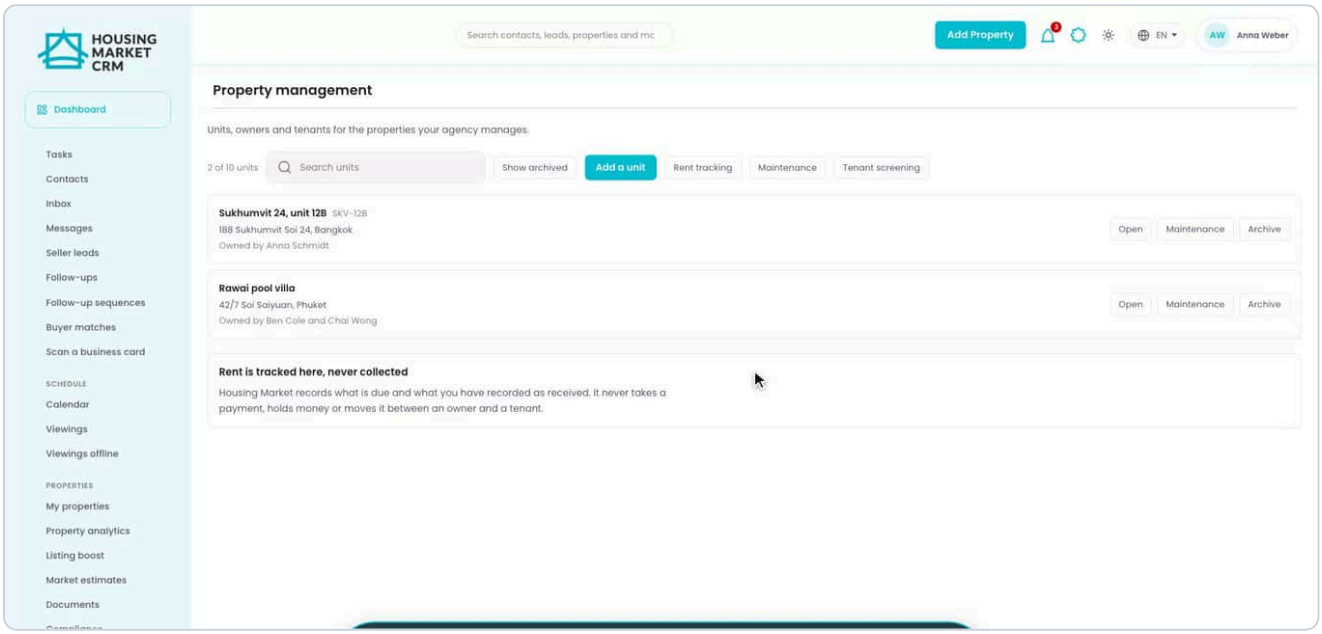


Figure 114.4 · Screen recorded 8 October 2026

5 An **unrecorded share** is what stops a statement later — record it now.

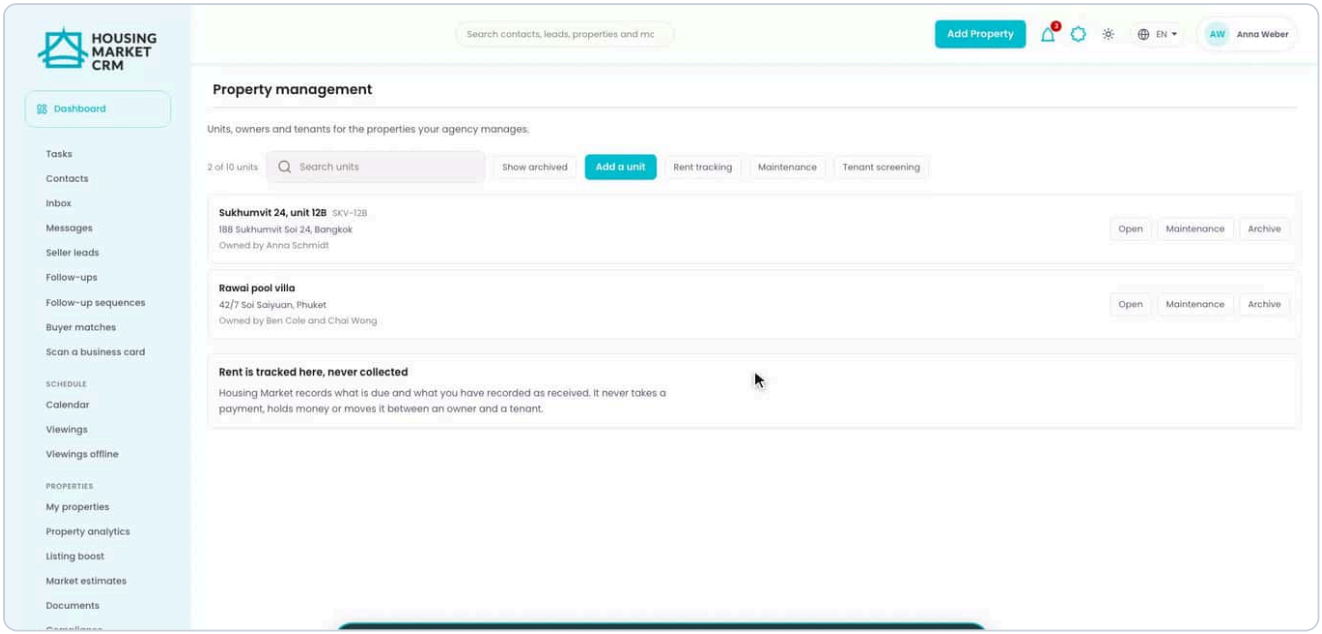


Figure 114.5 · Screen recorded 8 October 2026

6 **Archived** homes give the allowance slot back.

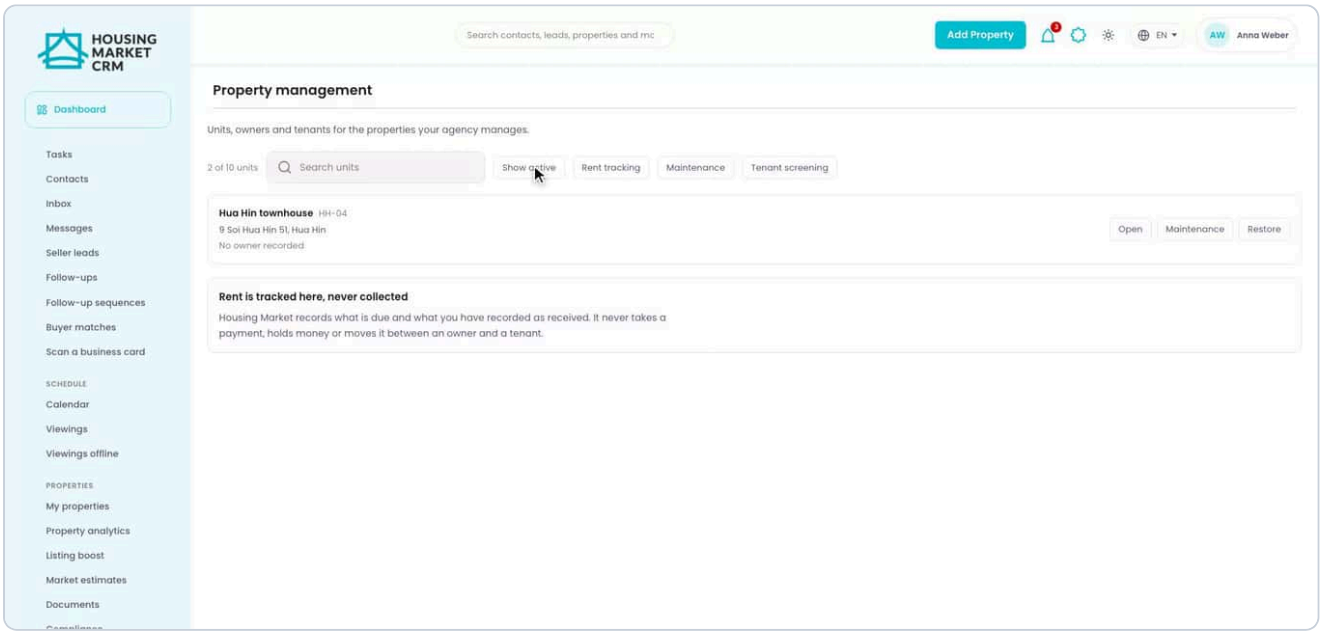


Figure 114.6 · Screen recorded 8 October 2026

7 Rent, tenancies, maintenance, screening and **owner statements**.

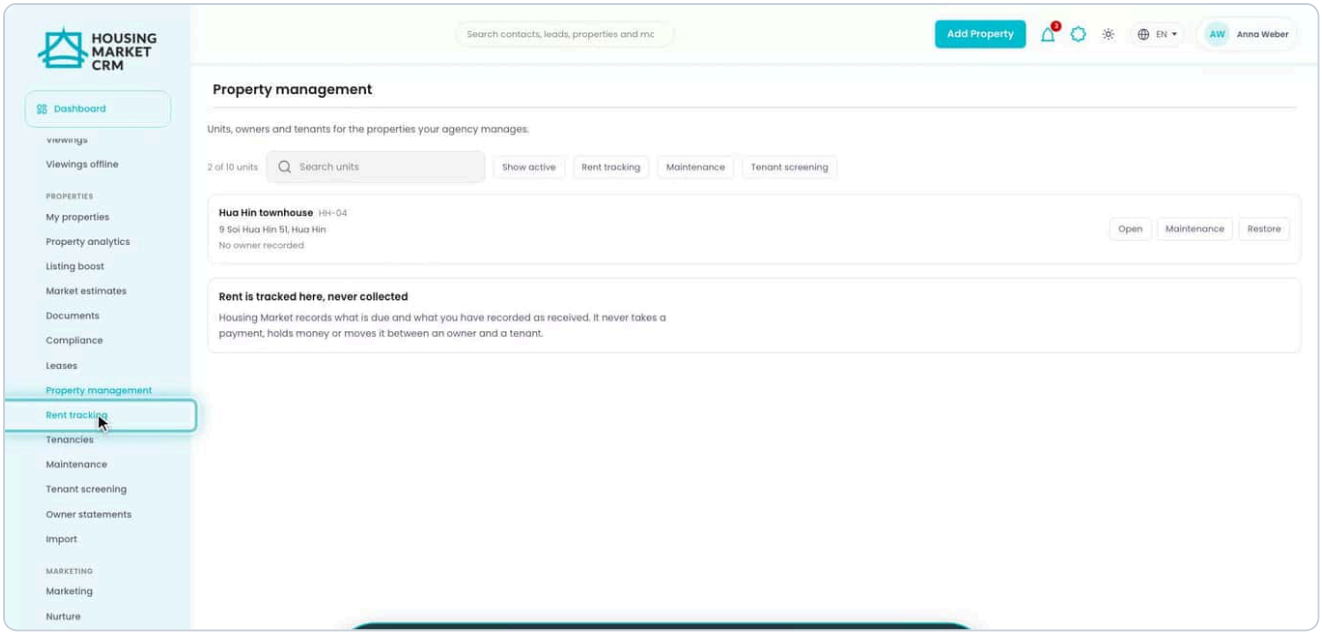


Figure 114.7 · Screen recorded 8 October 2026

8 Rent, tenancies, maintenance, screening and statements all read **these units**.

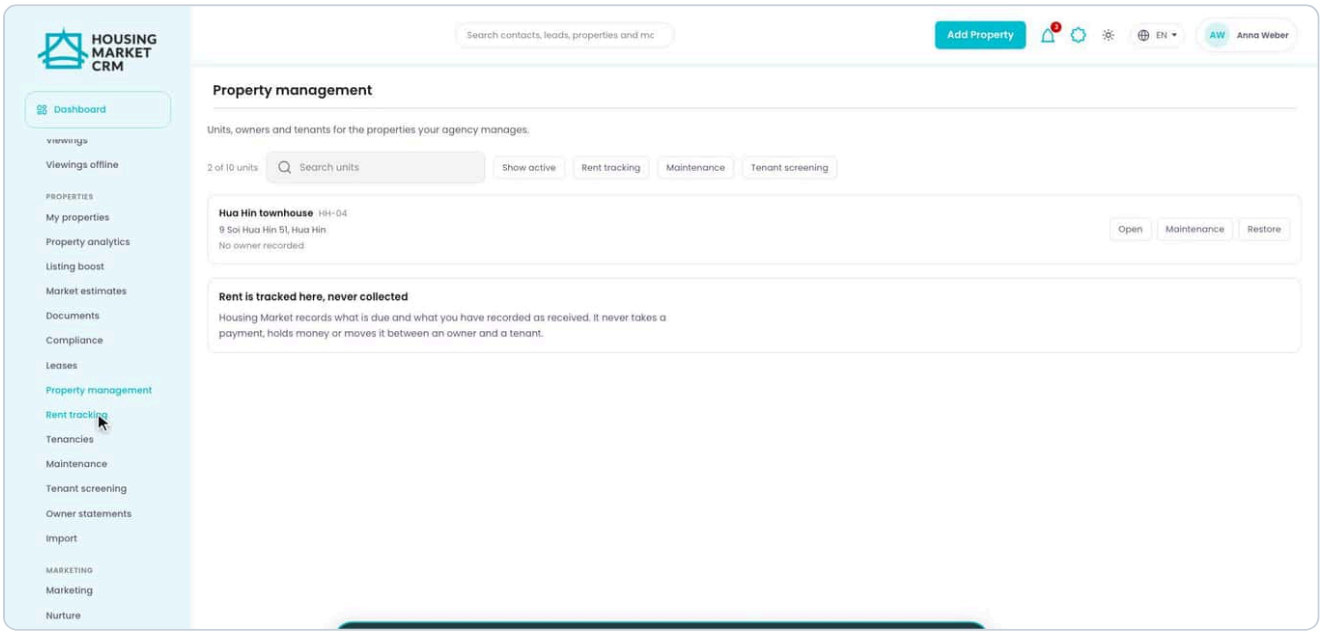


Figure 114.8 · Screen recorded 8 October 2026

9 So record every owner and share while the paperwork is in front of you.

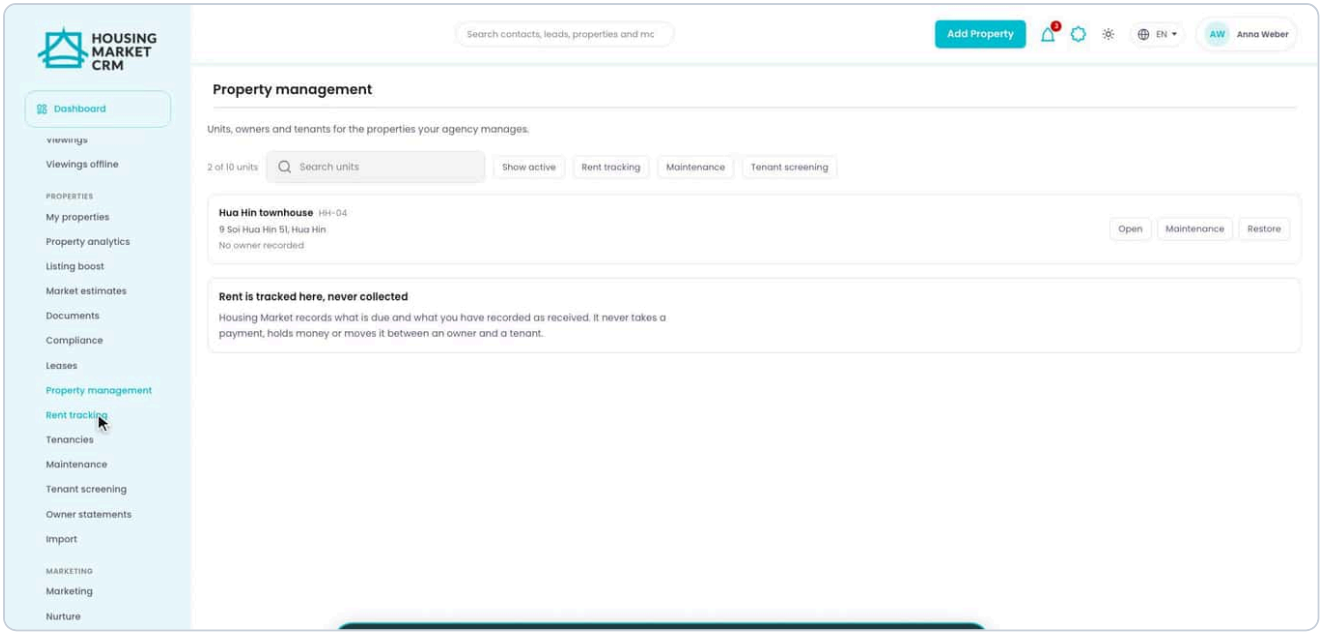


Figure 114.9 · Screen recorded 8 October 2026

GOOD TO KNOW

NOTE

Pro and Business both include 10 managed units. Larger packs are published at 29 USD for 50 units, 49 USD for 100, and 99 USD for unlimited, each per month — and a pack replaces the allowance your plan includes rather than adding to it. They cannot be bought online yet.

Help Center: How many units can I manage, and what do the unit packs cost?

115 CHAPTER 115

Track rent

Pro and Business | For agents | Watch the video

OVERVIEW

No. Housing Market Group is software. It records what is due and what you have recorded as received, and never takes a payment, holds money or moves it between an owner and a tenant.

No, and this is a decision rather than a missing feature. Housing Market Group is software: there is no payment processing, no collection, no escrow and no payment rail anywhere in property management, on any plan, in any country. The screen says so on every plan, because almost every other product in this category does collect rent and you should read that before you buy rather than after.

What tracking rent means

The CRM records the dates rent falls due on a unit — a whole tenancy at once, twelve months from March — and then holds three states for each of them: due, received, or waived. A monthly charge anchored on the 31st falls due on the last day of a shorter month rather than spilling into the next one, so rent anchored on 31 January comes due at the end of February rather than on 3 March. 3 March is what a naive calendar gives, and what an office would otherwise correct by hand every year.

When the money arrives, somebody in your office records the charge as received. The CRM stores who said so and when they said it, alongside the date the money actually arrived — rent that came in on the first and was recorded on the fourth belongs to the first. Those two dates are kept apart on purpose: an assertion by a named person is the only thing that actually happens inside Housing Market, and a bare "paid" would read like a receipt for something this system never received.

There is no part-paid state. Half of the rent is not a state on the way to a balance, because a balance leads to a ledger and a ledger is the thing this product deliberately does not have. Instalments are separate charges.

Overdue, and who hears about it

A charge is overdue when it is still due and its date has passed. That is worked out when you ask rather than stored, so a charge that fell due an hour ago is already overdue instead of waiting for tonight's job.

The reminder goes to your office and never to the tenant. All the CRM knows is that nobody in your office ticked the box; it did not take the money and cannot tell whether it arrived. Telling a tenant they are late on that evidence is a claim this product is not entitled to make, and your tenant is your client, not ours. The wording is "not recorded as received" rather than "unpaid", in every language, for exactly the same reason.

Rent has its own screen: choose Rent tracking under Property management. It lists the dates rent falls due across your agency, shows what is late and what falls due soon, and lets you schedule a whole tenancy at once, record a charge as received, waive one, or reopen one recorded in error. The rule above does not change with it.

From the Help Center: **Does Housing Market collect rent from my tenants?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

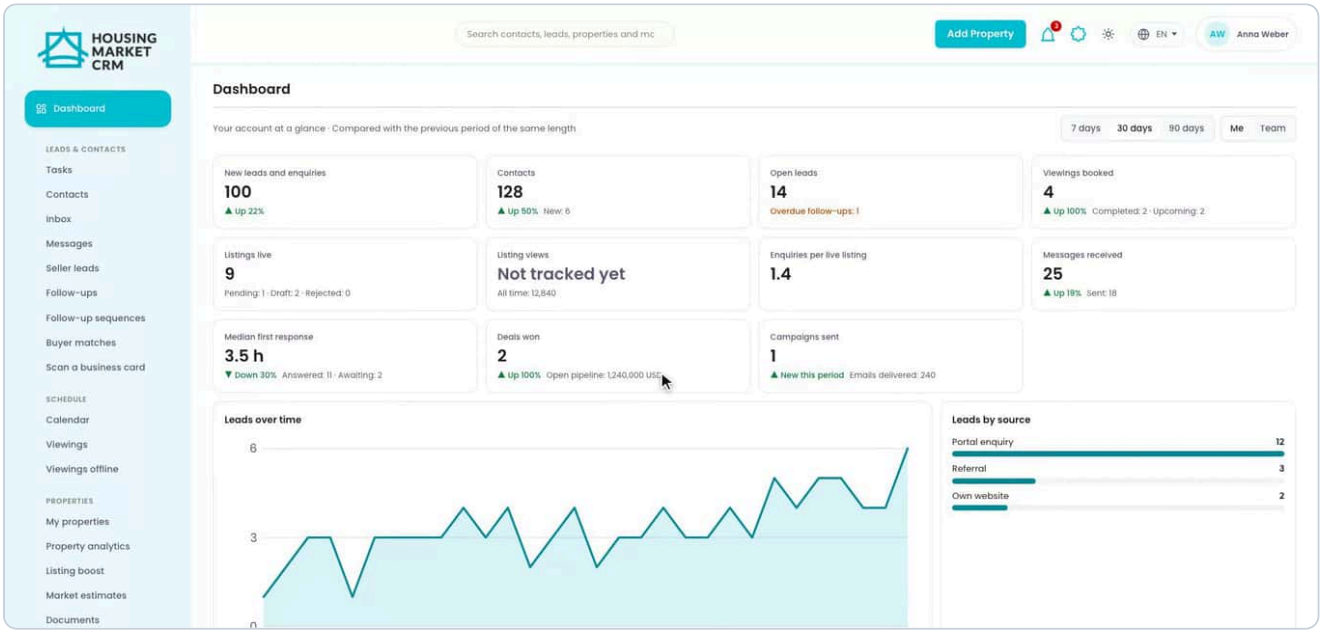


Figure 115.1 · Screen recorded 8 October 2026

2 Click **Rent tracking** in the left menu.

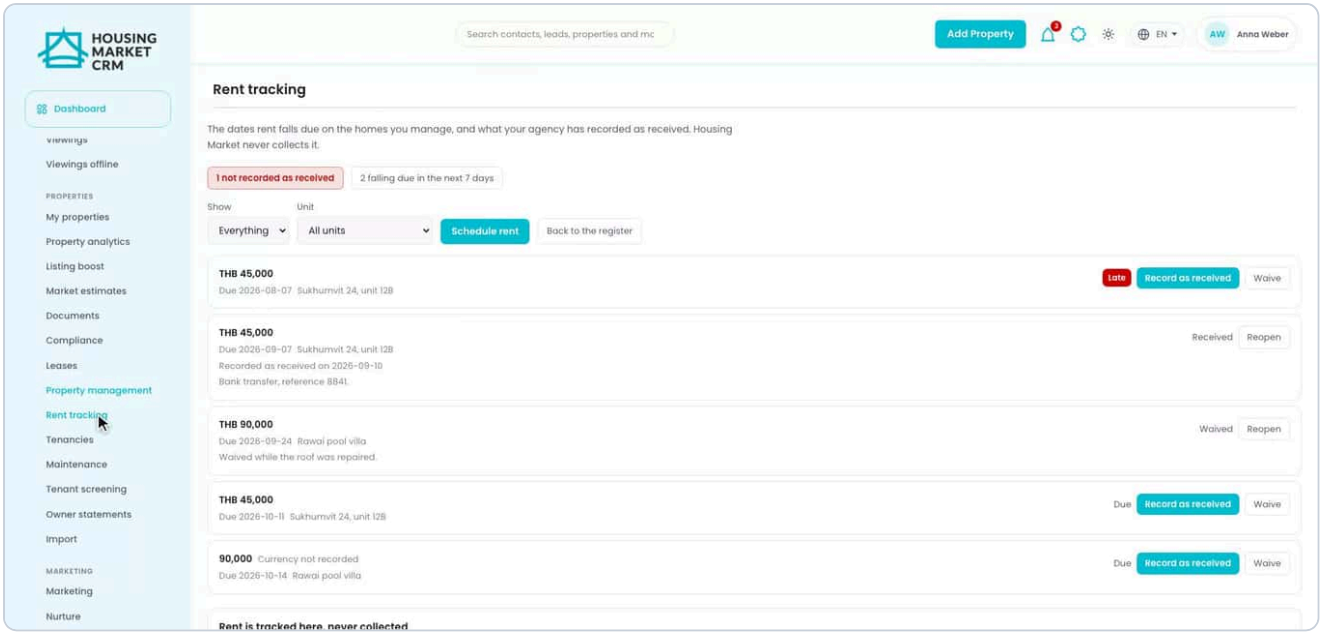


Figure 115.2 · Screen recorded 8 October 2026

3 Your agency's record. Housing Market **collects nothing**.

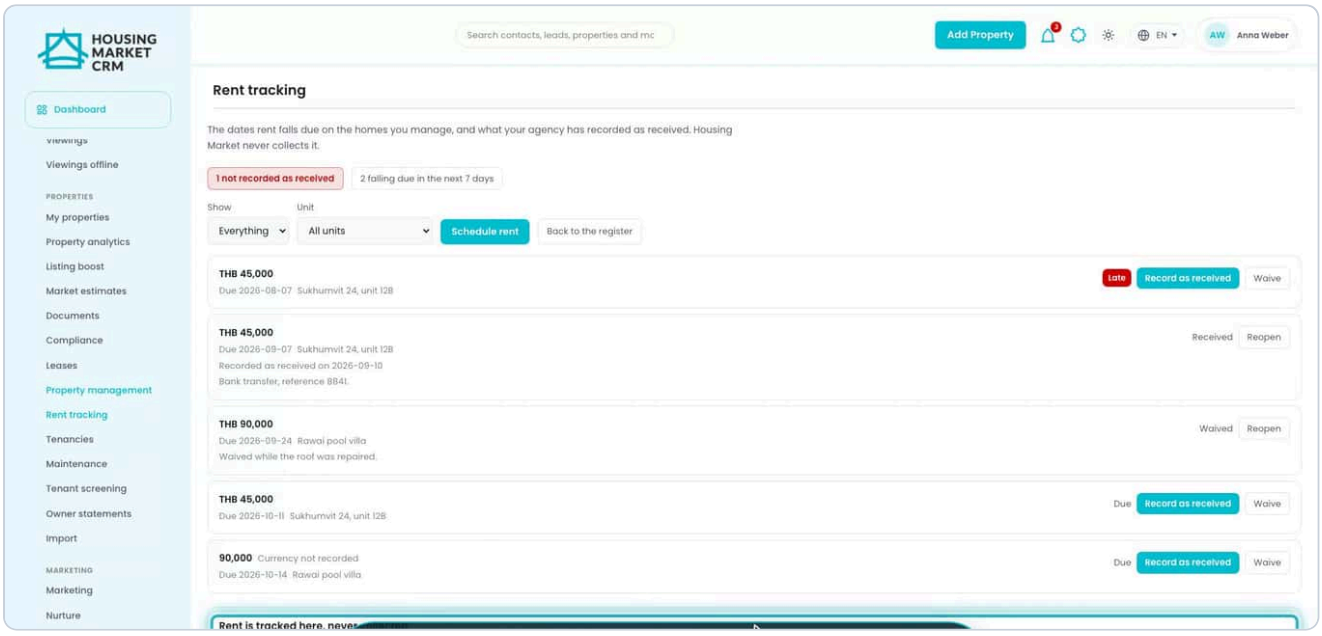


Figure 115.3 · Screen recorded 8 October 2026

4 **Schedule rent** for the whole tenancy at once.

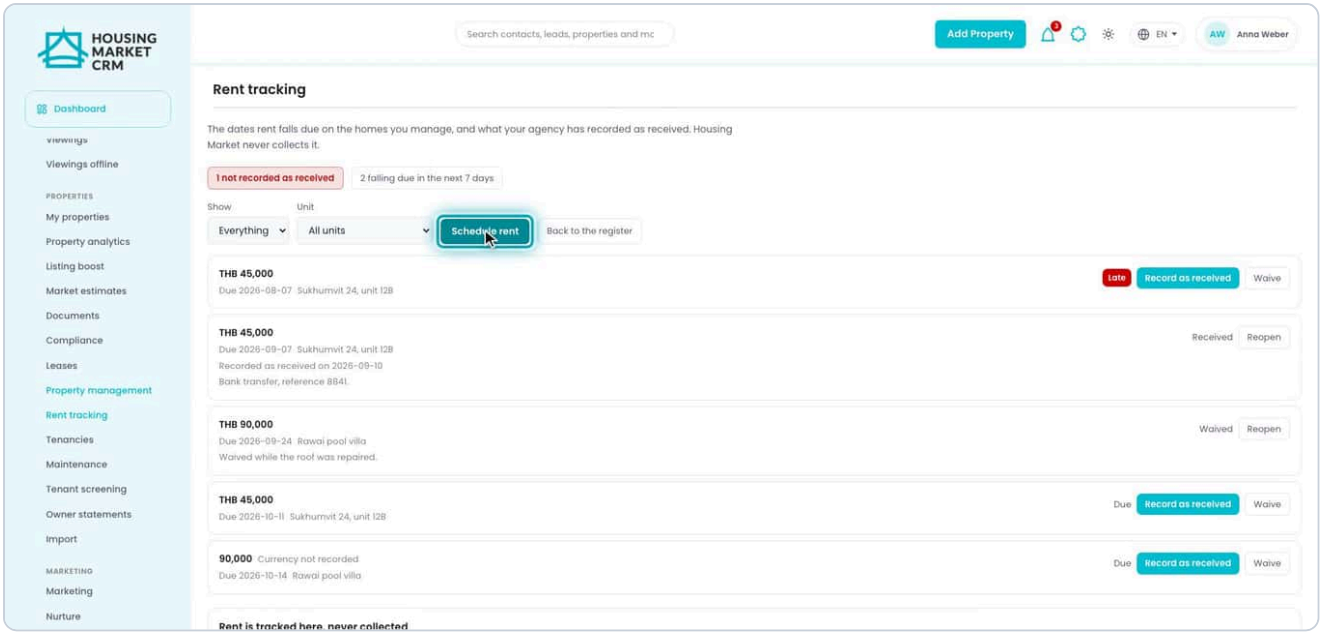


Figure 115.4 · Screen recorded 8 October 2026

5 Then an overdue month appears **without anybody remembering**.

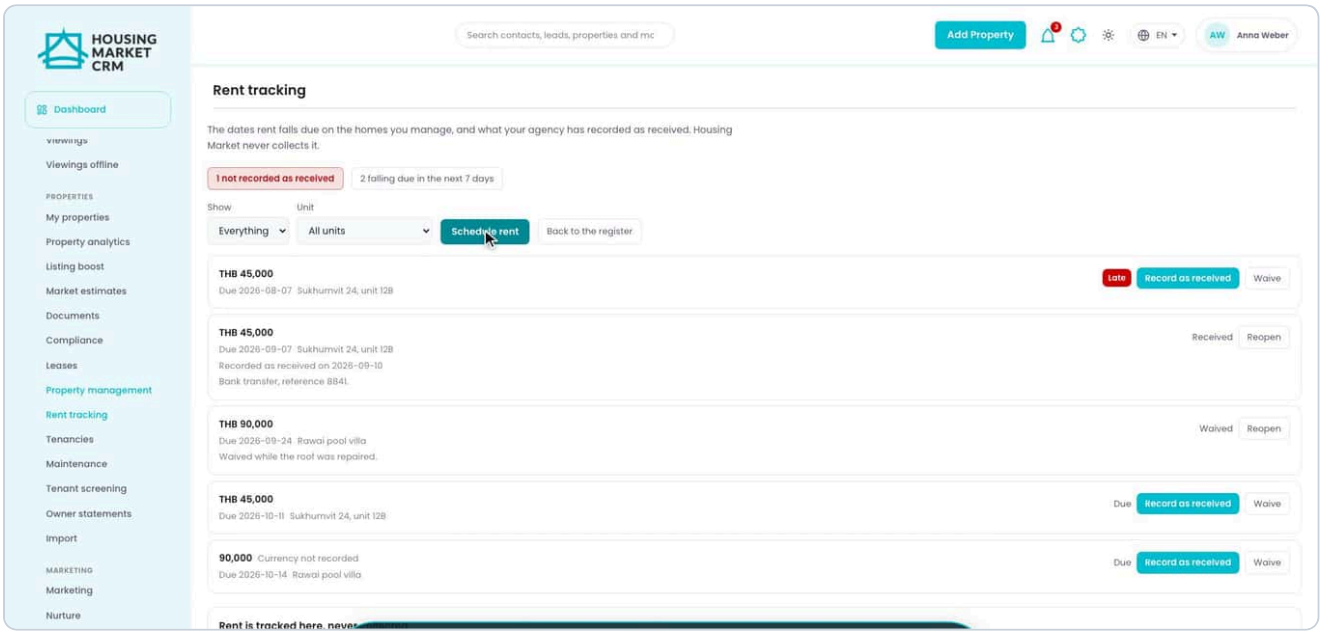


Figure 115.5 · Screen recorded 8 October 2026

6 **Record as received** — with the date it actually arrived.

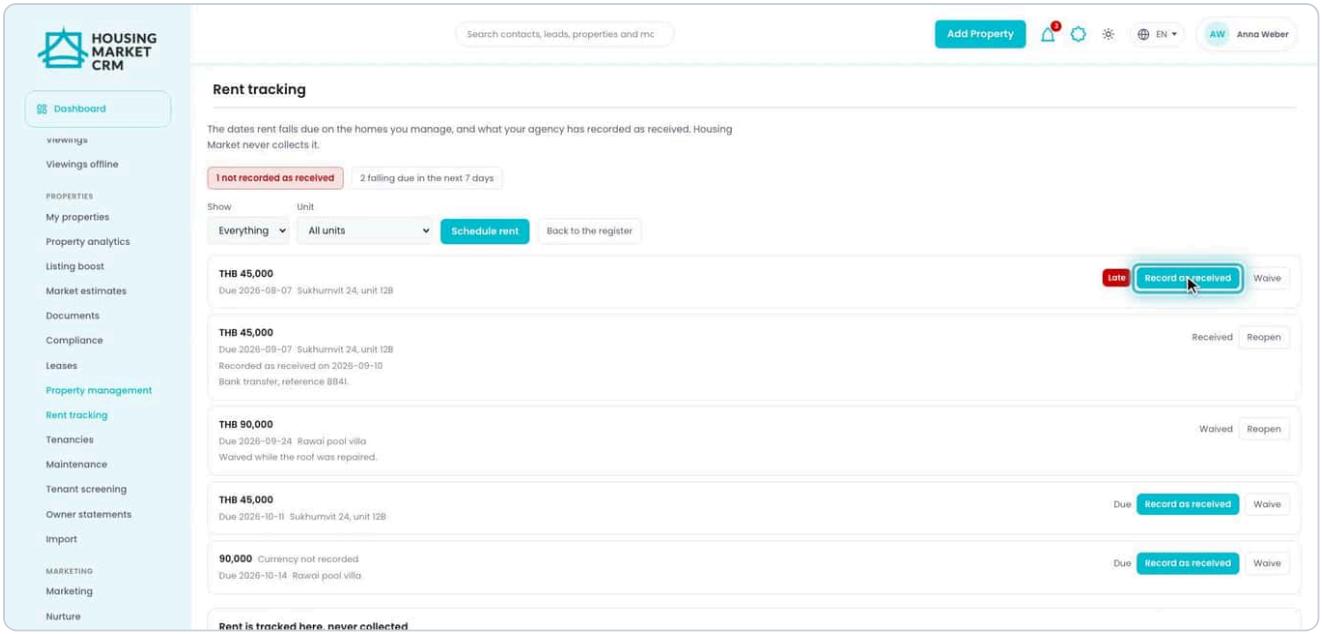


Figure 115.6 · Screen recorded 8 October 2026

7 **Waive** a month the owner agreed to forgo.

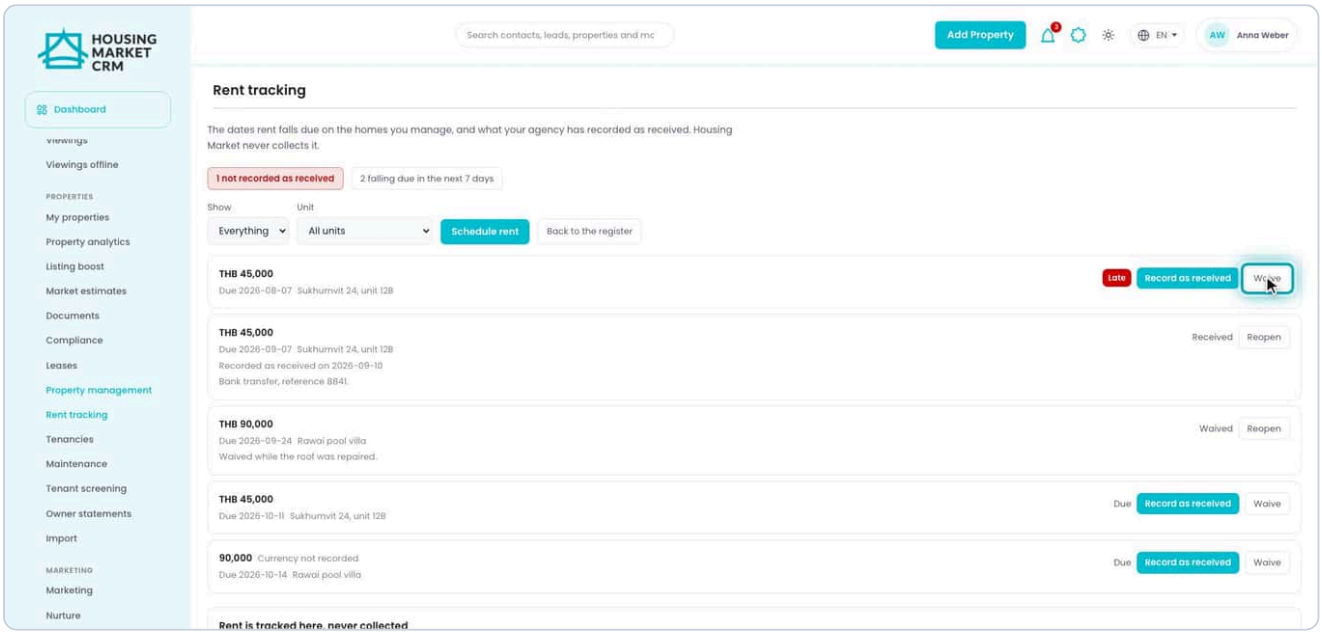


Figure 115.7 · Screen recorded 8 October 2026

8 **Reopen** undoes it.

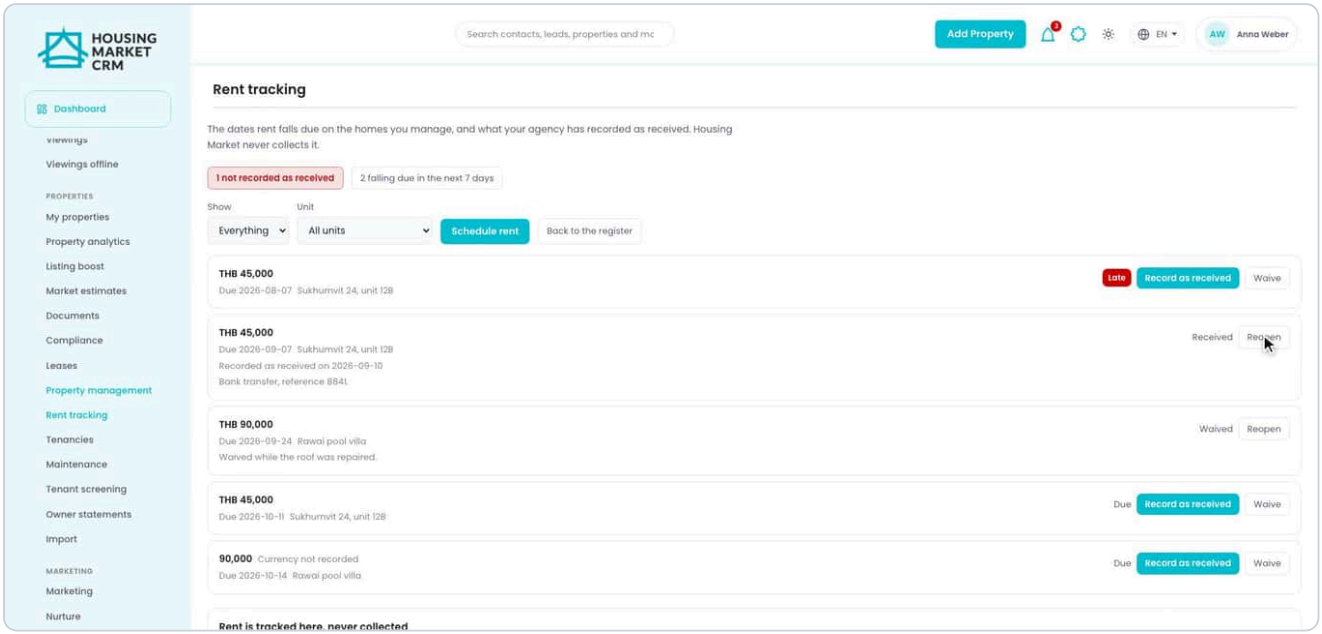


Figure 115.8 · Screen recorded 8 October 2026

116 CHAPTER 116

Record a tenancy

Pro and Business | For agents | Watch the video

OVERVIEW

Choose Tenancies under Property management. A tenancy records who rents the home, the term, the rent and the deposit — as a draft while terms are still being agreed, then activated. A renewal is recorded as a new tenancy rather than as an edit to the old one.

Choose Tenancies under Property management. It answers who lives in each home you look after, for how long, and at what rent — and it is the record an owner statement is later built from, which is why it is kept rather than edited over.

Recording one

- Choose Record a tenancy.
- Choose the Unit, and give the Tenant and the Landlord.
- Give the dates it Starts and Ends. The end must be after the start.
- Give the Rent and choose the Rent cycle — per month, per week, per night or per year.
- Give the Deposit and the currency, if you hold one.
- Tick "Save as a draft, while the terms are still being agreed" if nothing is settled yet.

The landlord is a name you type rather than the unit's owner taken automatically, and that is deliberate: the person on the agreement and the person on the title are not always the same, and a managed home is often let by one of several owners.

Draft, then active

A draft is a proposal. Two candidates for one flat are two drafts, so drafts are allowed to overlap each other and to overlap a tenancy that is already running. Activate is where that stops being true: the CRM refuses to activate a second tenancy over the same dates and names the one already in force, which is the check that stops a home being let twice.

The rent cycle is recorded as agreed and never converted. A weekly rent stays weekly, and a statement reads the rent from the tenancy that was in force that month rather than the one in force today.

Renewing and ending

Renew creates a new tenancy and marks the old one as renewed, ending it the day before the new one starts. It is not an edit, and that is the point: the rent agreed for earlier months has to stay exactly as it was, or every statement for those months would quietly change. Leave the rent blank on a renewal to carry the current figure forward.

End the tenancy closes it on the date it was agreed to end. Ending it earlier than that is recorded as Ended early rather than as Ended, so the two are told apart afterwards. An ended tenancy stays in the list — ended and archived are different things, and a statement for an earlier month still needs it.

The deposit

A deposit is a figure you record and it shows as still held, or as returned on a date. Housing Market does not take it, hold it, protect it or pass it anywhere: the money stays wherever your agency or your landlord already keeps it, and this is a note of what that amount is.

What this screen does not do

- It does not collect the rent. Rent falling due is scheduled separately on the Rent tracking screen; recording a tenancy raises no charges by itself.
- It does not produce or sign the agreement. There is no tenancy document, template or signature here — contracts and signatures are the document vault, on the deal and the contact.
- It does not remind you that a tenancy is ending.
- There is no edit form once a tenancy exists, and nothing is deleted: Archive takes a tenancy out of the default list and Restore brings it back.

Rent is tracked and never collected. See "Does Housing Market collect rent from my tenants?".

From the Help Center: **How do I record a tenancy on a managed unit?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

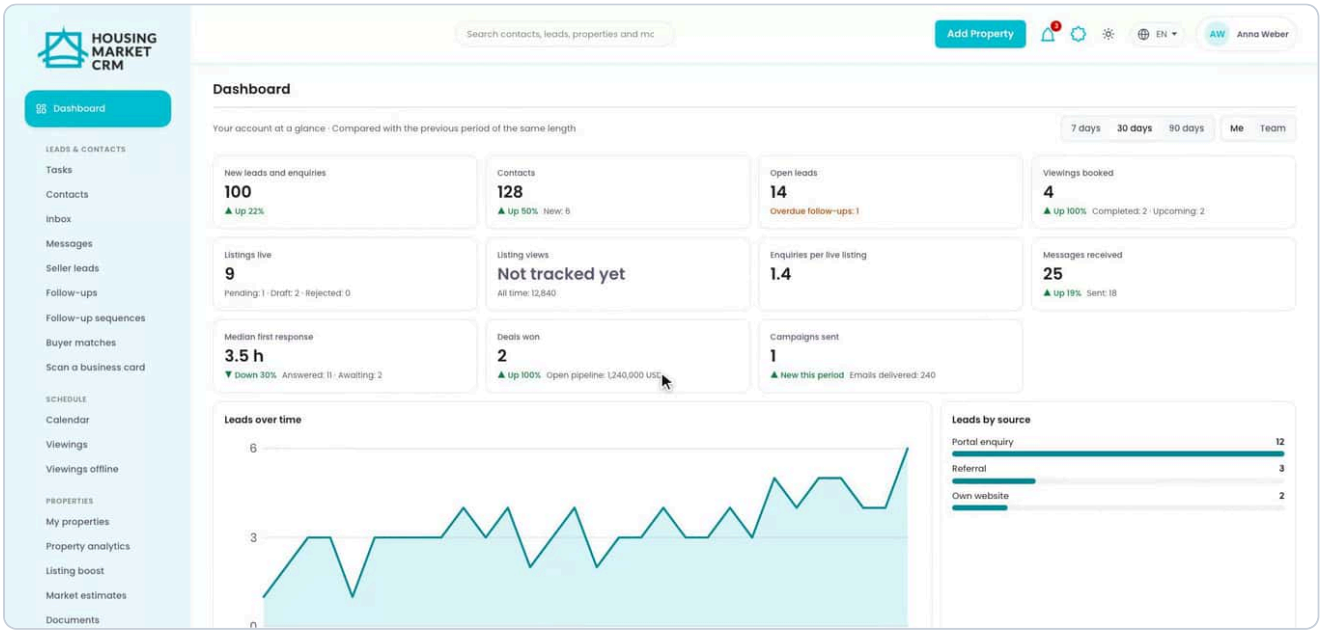


Figure 116.1 · Screen recorded 8 October 2026

2 Click **Tenancies** in the left menu.

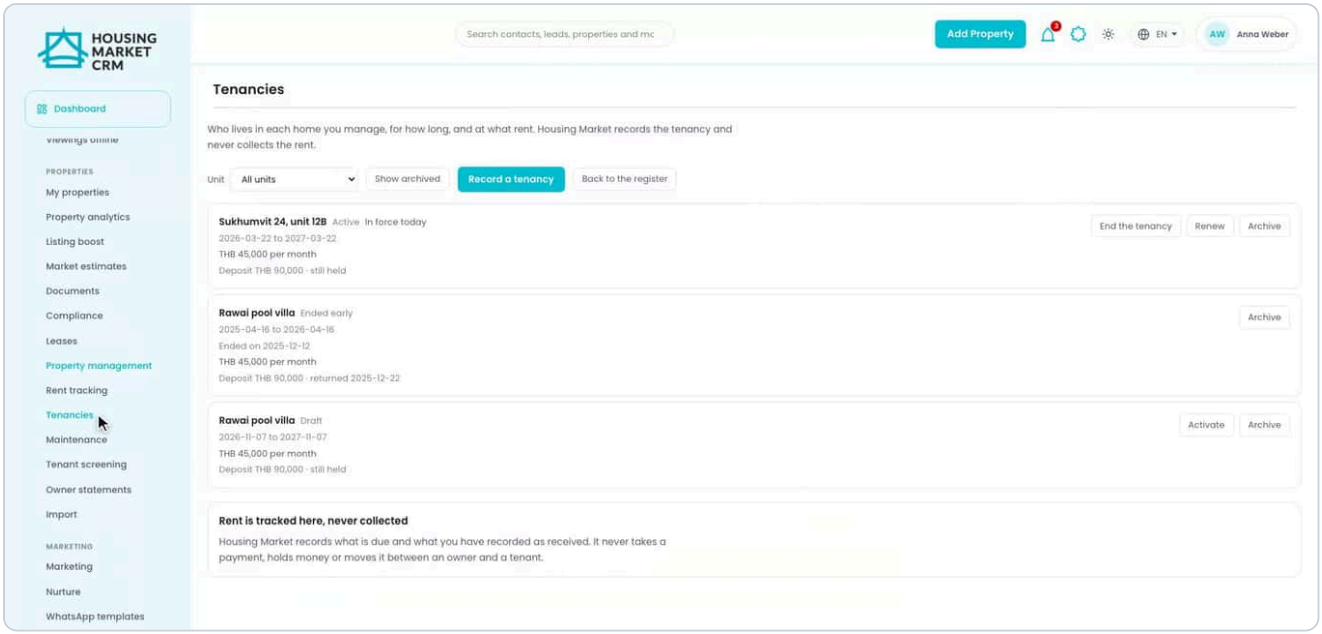


Figure 116.2 · Screen recorded 8 October 2026

3 Who lives there, **for how long**, and at what rent.

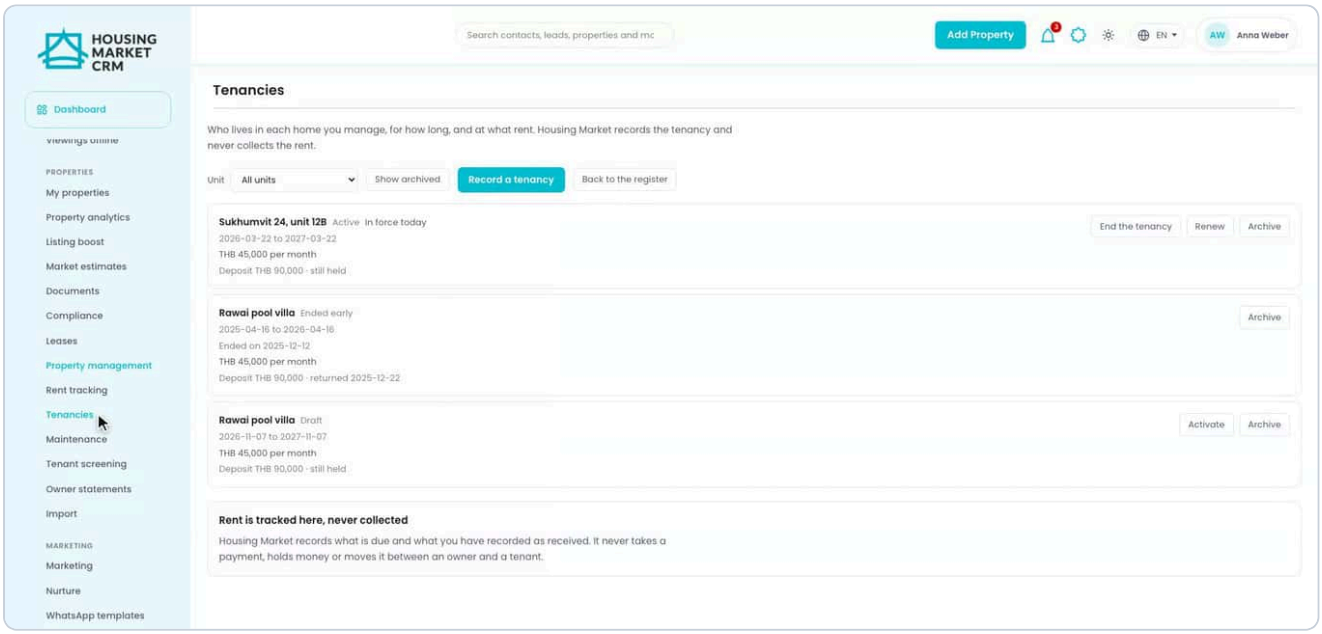


Figure 116.3 · Screen recorded 8 October 2026

4 Record a tenancy when it is signed.

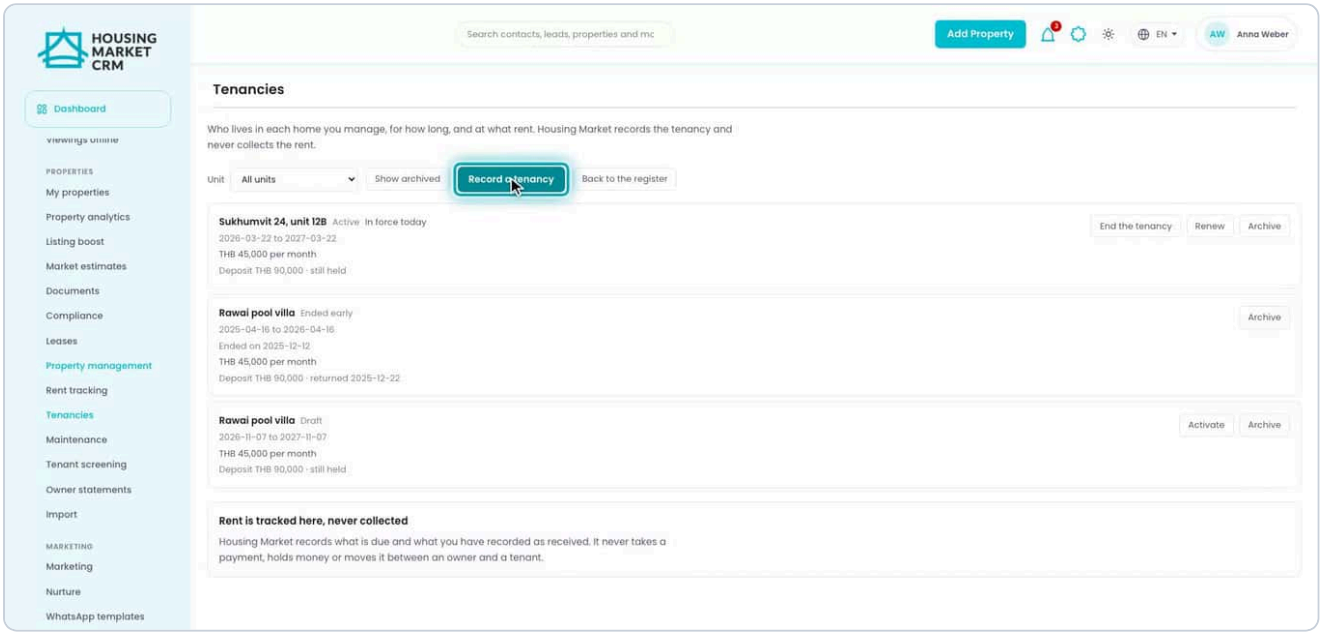


Figure 116.4 · Screen recorded 8 October 2026

5 Renew makes a new tenancy so last year's rent stays right in last year's statement.

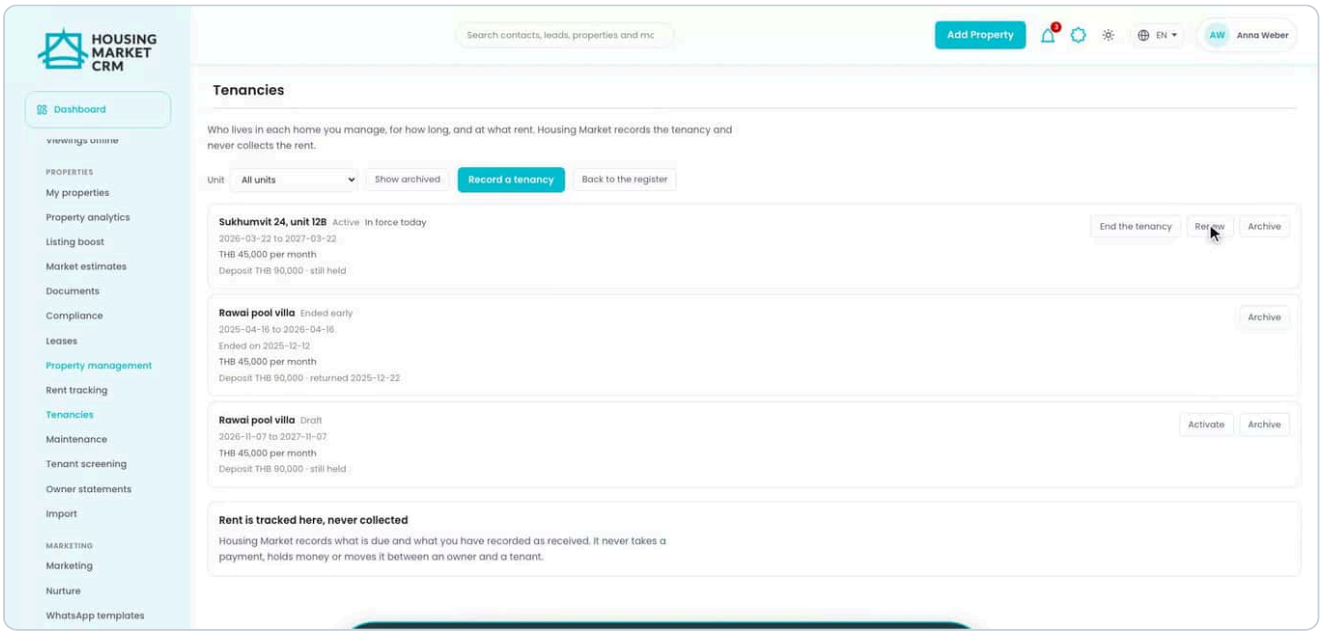


Figure 116.5 · Screen recorded 8 October 2026

6 End the tenancy — the rent recorded against it stays.

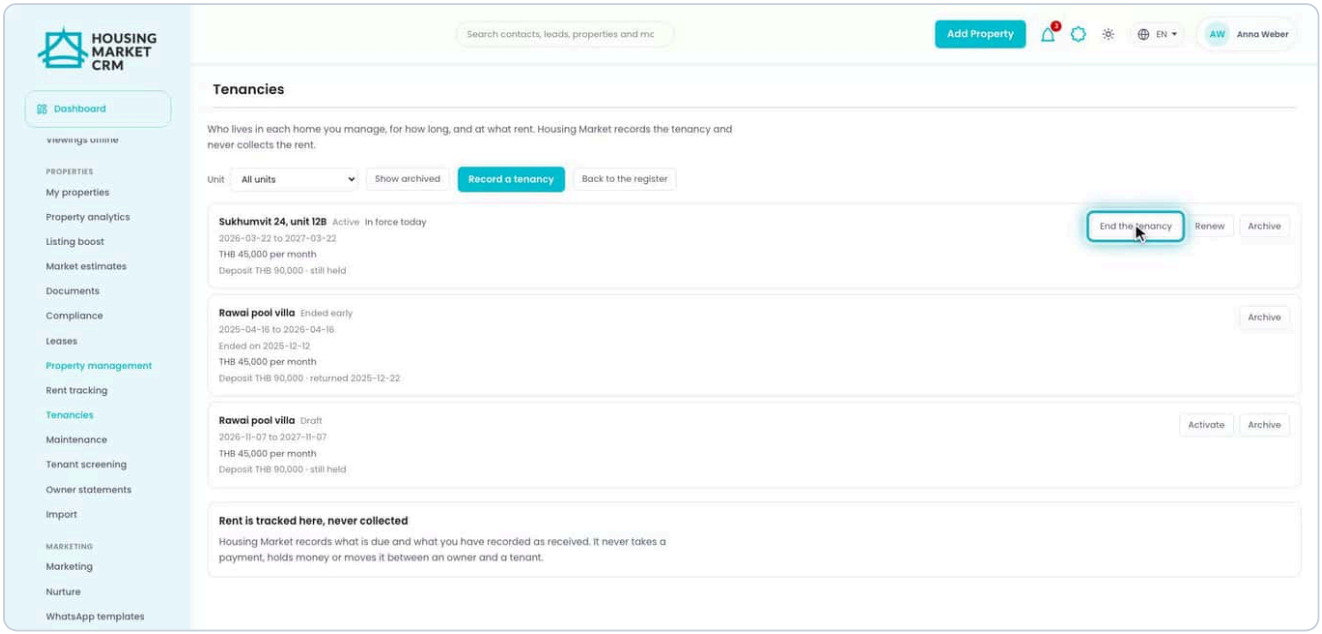


Figure 116.6 · Screen recorded 8 October 2026

7 Archived keeps the history out of the way.

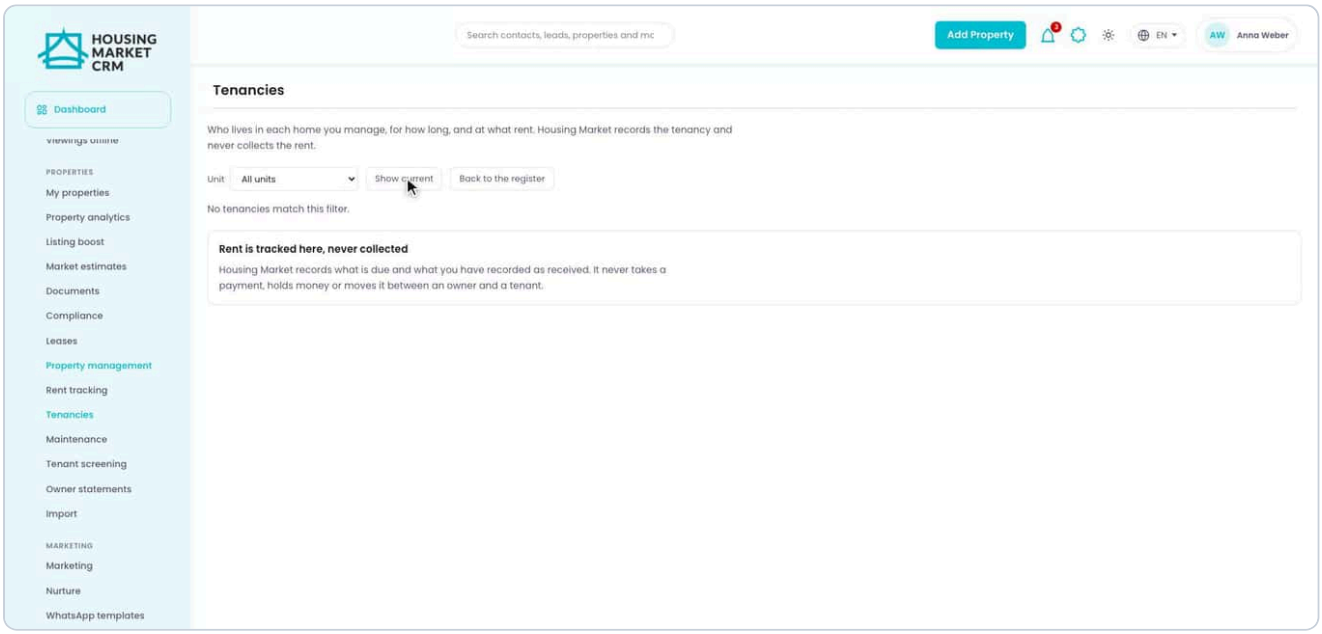


Figure 116.7 · Screen recorded 8 October 2026

117 CHAPTER 117

Maintenance requests

Pro and Business | For agents | Watch the video

OVERVIEW

Choose Maintenance under Property management. Report what is wrong against a home you manage, give it a kind and a priority, attach photos, take it on, and carry it through to resolved. No cost is ever recorded and nothing is billed.

Choose Maintenance under Property management. It answers what is broken in the homes you look after, who is dealing with it, and what is still outstanding — and it keeps the whole history for each home, which is the part that matters a year later when the same boiler fails again.

Reporting a problem

- Choose Report a problem.
- Choose the Unit and write What is wrong.
- Add Details if there are any.
- Choose the Kind of problem — plumbing, electrical, appliance, heating and cooling, structural, pests, grounds, locks and security, cleaning, or something else.
- Choose the Priority — Urgent, High, Normal or Low.

Photos are added once the request exists rather than on the form, so the report is filed the moment you know about it and the pictures follow. Each photo opens through a fresh private link; removing one takes it off the request and keeps the file, because a photo is evidence of the state a home was in on a date.

Priority sets the target, and the target is fixed

Each priority carries its own target, counted from the day the problem was reported: one day for Urgent, three for High, fourteen for Normal and thirty for Low. A request still open past its target is badged Past the target, and a resolved or called-off one never is. The targets are the same for every account and cannot be changed.

The figures above the list count your whole agency rather than the list you are looking at: how many are urgent, how many are past the target, and how many are outstanding.

Working through one

The status moves from Reported through Acknowledged, Scheduled and In progress to Resolved, or to Called off. Resolving asks for the date the work was actually finished — which may not be today — and what was done; the CRM records who said so and when. Calling a request off clears that name again, because nobody fixed anything and no name belongs against work that was not done.

Take this on assigns the request to you, and Hand it back releases it. It needs the right to assign, and it assigns to you rather than to a colleague you pick.

Show defaults to Outstanding, so the screen opens on the work rather than on the archive. The other views are Past the target, Everything, each of the six statuses, and Archived. Filtering by unit also adds "Everything reported for this home", which is that home's history oldest first.

What is not here, on purpose

- No cost, quote, estimate, budget or invoice. There is no amount anywhere on a maintenance request, and Housing Market never bills for the repair, takes a share of it or moves money between an owner, a tenant and a contractor.
- No contact with the contractor. Nothing here emails, messages or notifies a tradesperson — they are not a user of your CRM.
- No tenant reporting. There is no tenant portal and no form a tenant can fill in; somebody in your office files the request.
- No appointment or visit date. Scheduled is a status word, not a calendar entry.
- No reminder. Unlike rent, maintenance raises no notification when a target passes — the badge on the list is what tells you.

Nothing is deleted. Archive takes a request off the list and Restore brings it back, with its photos, its history and the name of whoever resolved it.

From the Help Center: **How do maintenance requests work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

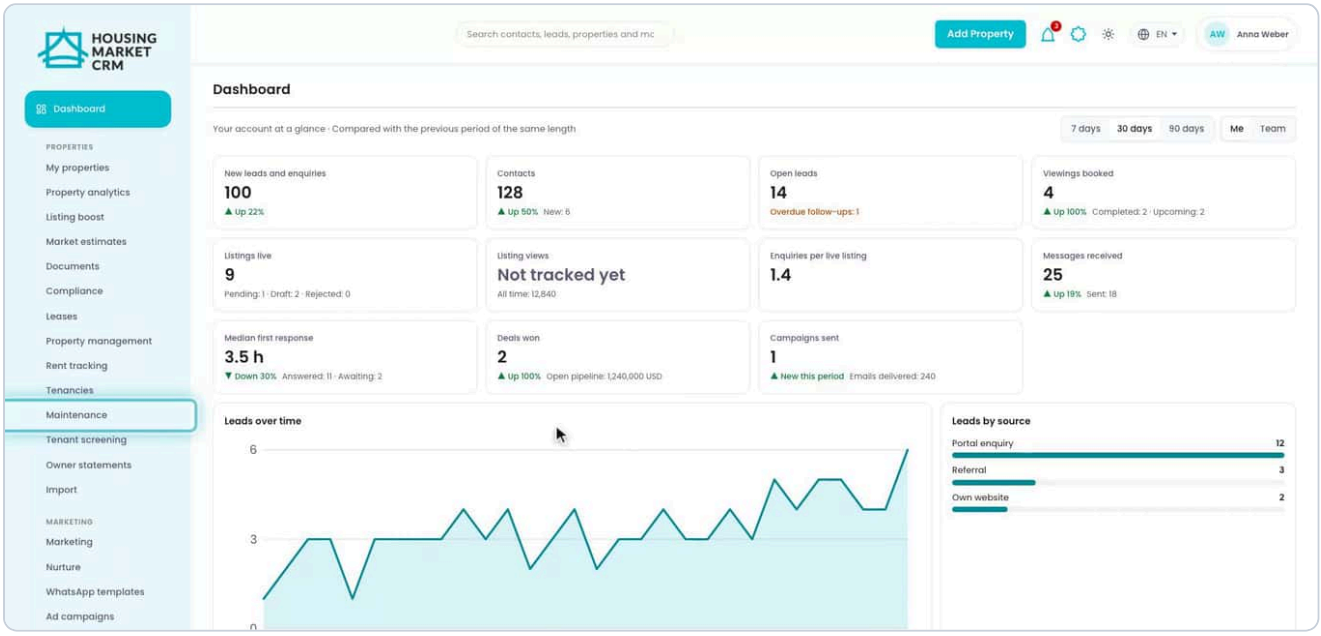


Figure 117.1 · Screen recorded 8 October 2026

2 Click **Maintenance** in the left menu.

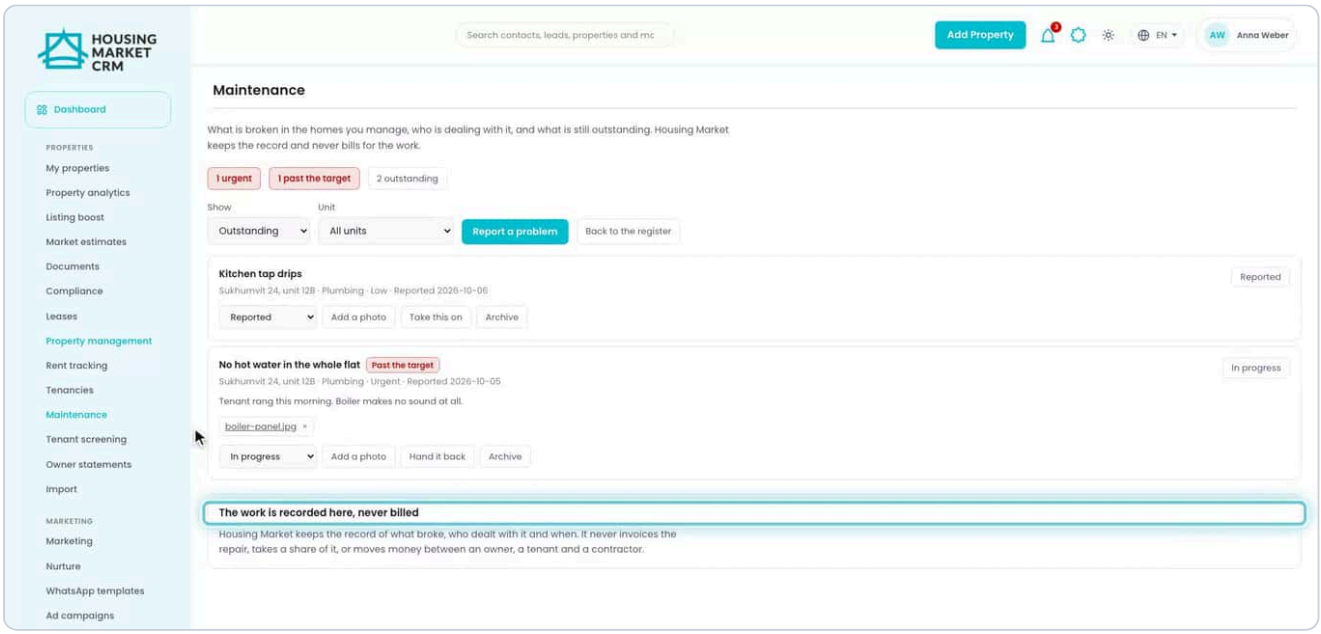


Figure 117.2 · Screen recorded 8 October 2026

3 Recorded here, **never billed** by Housing Market.

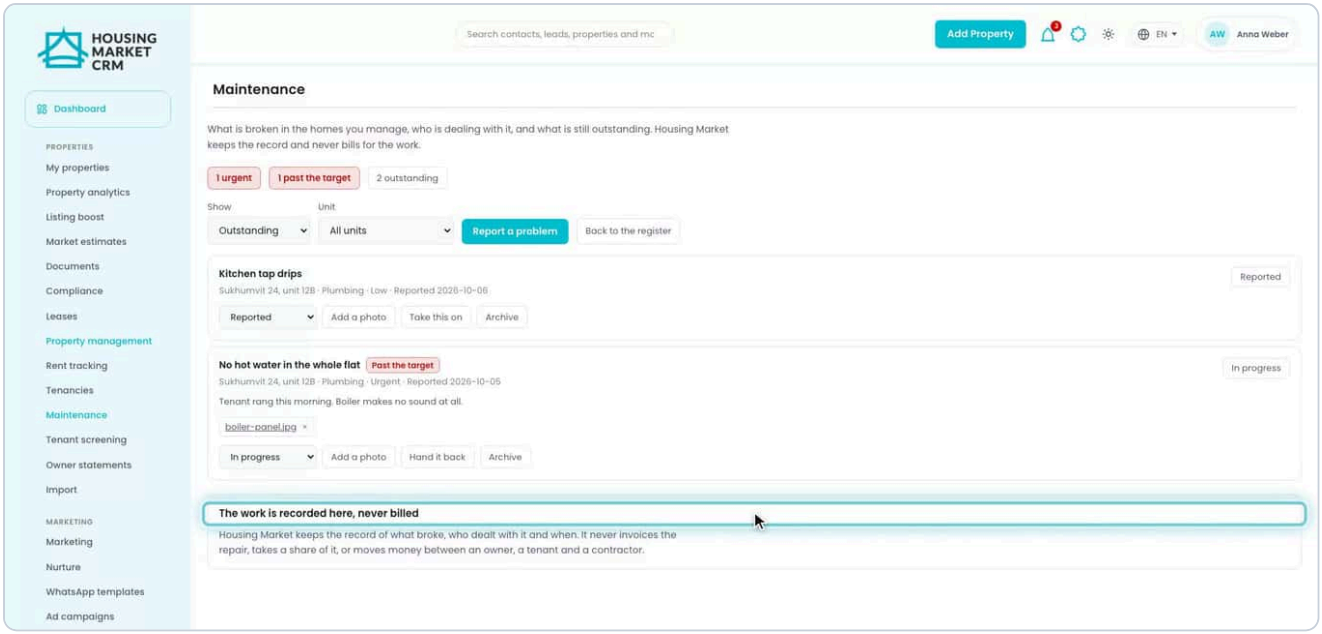


Figure 117.3 · Screen recorded 8 October 2026

4 Each priority has its **own** idea of late.

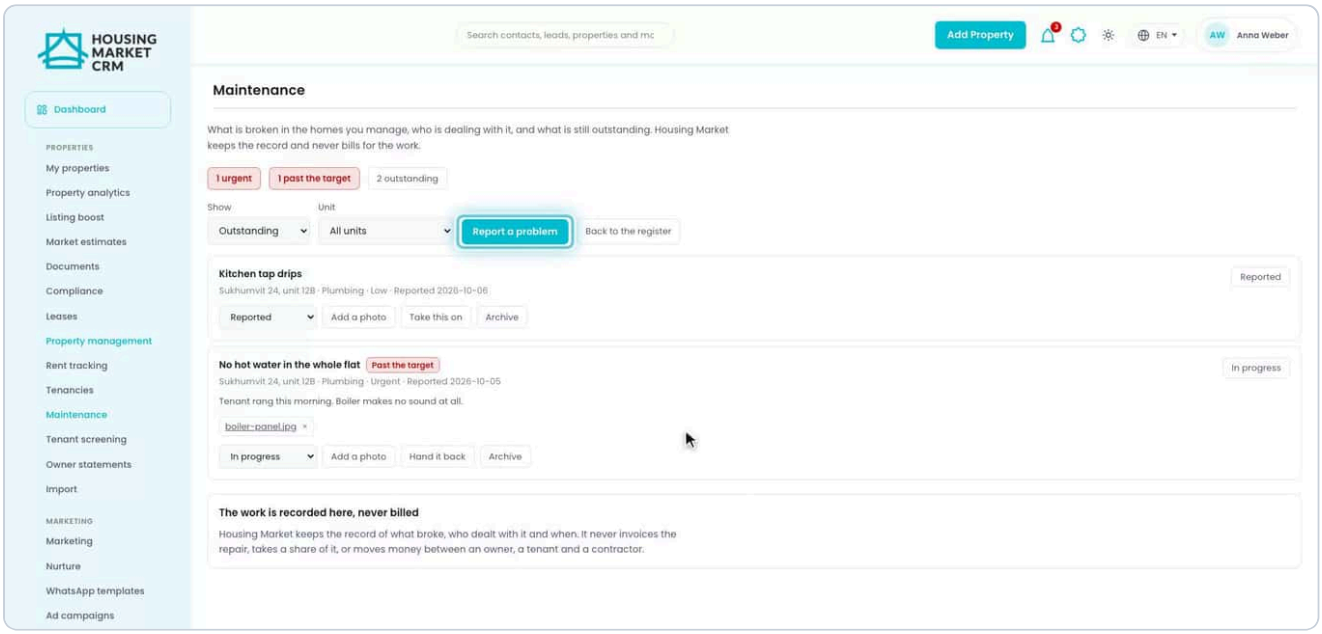


Figure 117.4 · Screen recorded 8 October 2026

5 **Report a problem** against the home.

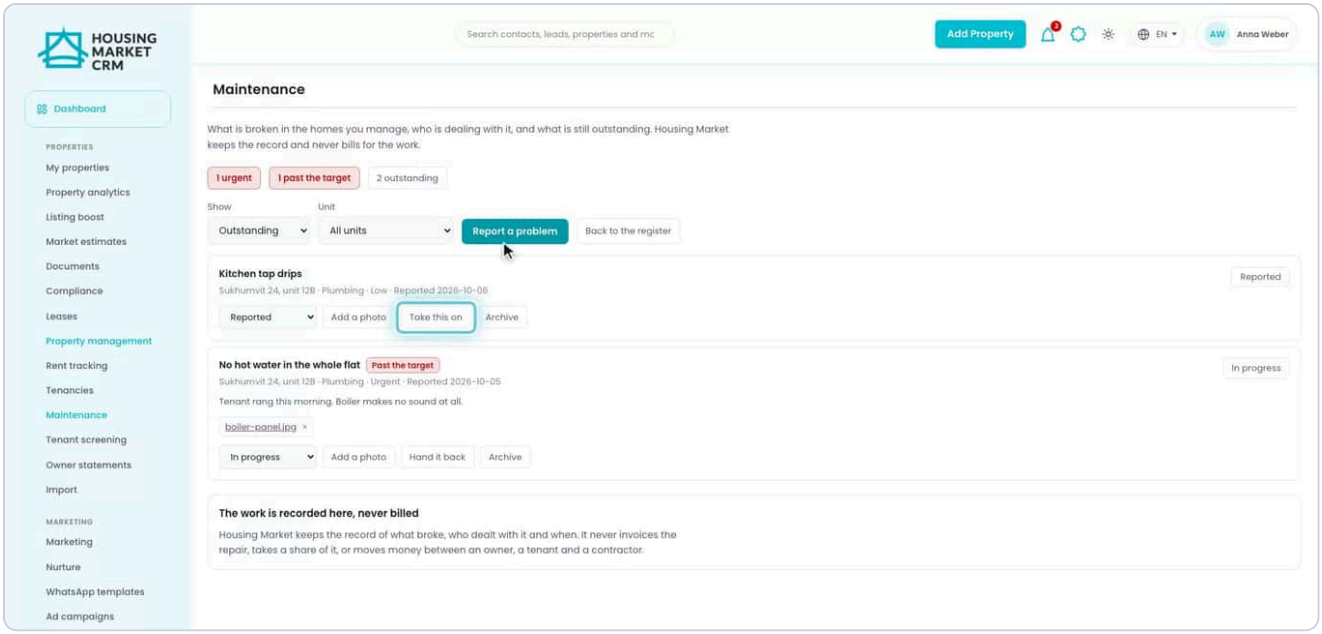


Figure 117.5 · Screen recorded 8 October 2026

6 **Take this on** puts your name against it and **Hand it back** releases it.

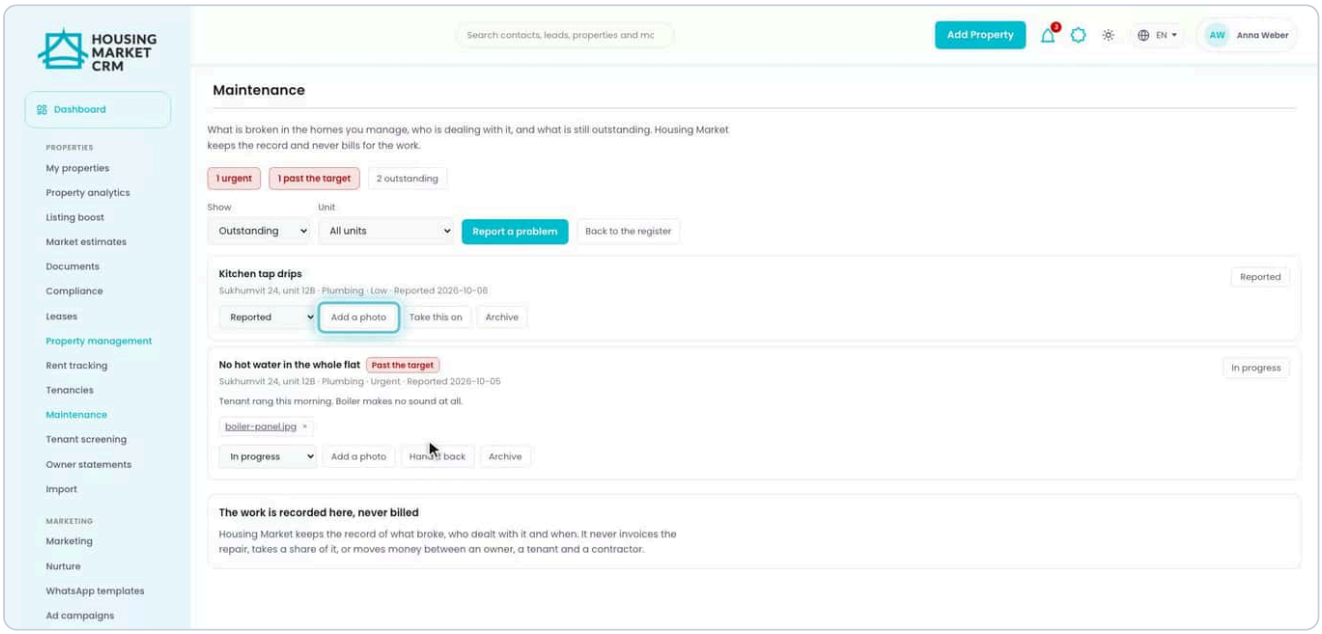


Figure 117.6 · Screen recorded 8 October 2026

7 **Add a photo** — the only evidence of the state it was in.

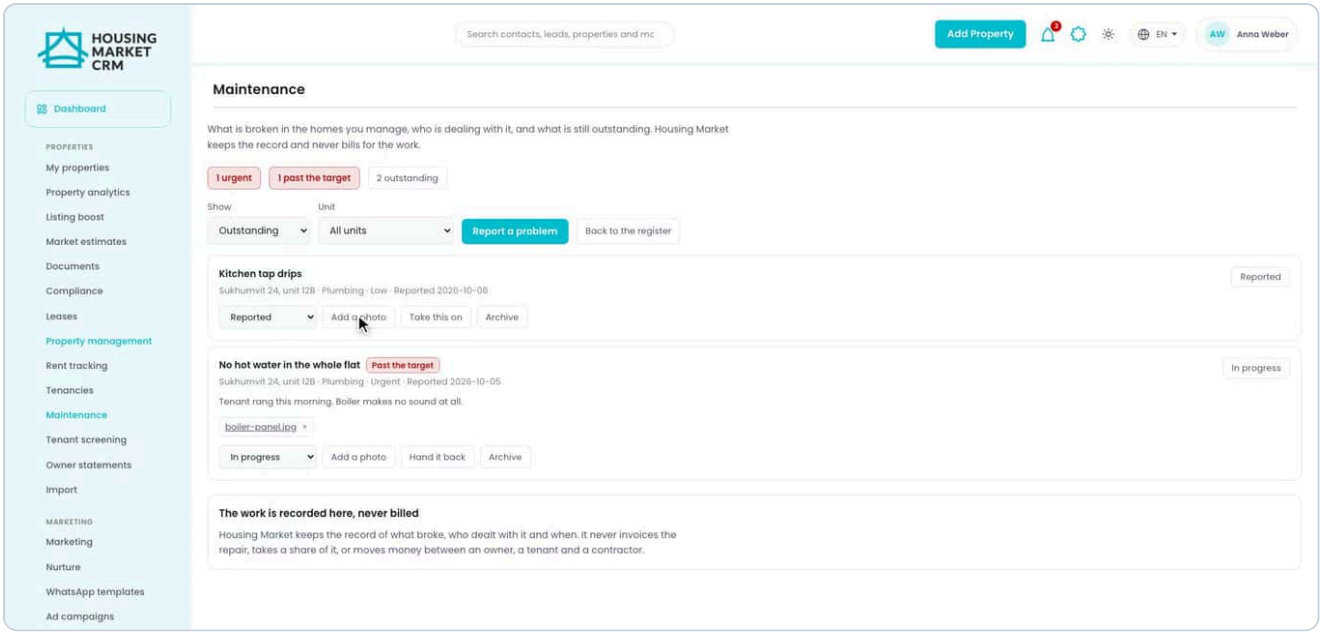


Figure 117.7 · Screen recorded 8 October 2026

118 CHAPTER 118

Screen a tenant

Pro and Business | For agents | Watch the video

OVERVIEW

It records the checks your agency carried out itself. Housing Market contacts no credit bureau, no background-check company and no identity-verification service, and produces no score: every outcome on the screen is one you established and typed in.

Choose Tenant screening under Property management. It holds the applications for the homes you manage, the checks your agency carried out, and the decision you recorded.

Read this first: the checks are yours, not ours

Housing Market runs no check on anybody. There is no credit bureau, no background-check company, no identity-verification service, no sanctions or eviction search, and no credit score anywhere in this feature — not switched off, not planned for a later plan, not there. Every outcome on the screen is one your agency established by its own means and then wrote down.

This is said first because "tenant screening" means a bought report in most products that offer it, and a reader who is not told will assume a report arrives. What this screen gives you is one place where the referencing you already do is recorded against the application it belongs to, with the decision beside it and both kept.

Taking an application

- Choose Take an application.
- Choose the Unit and the Applicant. The applicant is one of your own contacts.
- Give the date they want to move in, if you know it.

The application points at your address book rather than making a second copy of the person. Nothing in this feature stores a date of birth, an identity-document number, a bank account, a salary figure or an employer's name — what you concluded about income or employment is one word and whatever note you chose to write.

Recording a check

Record a check holds six kinds — Identity, Employment, Income, Previous landlord, Affordability and Other — and each takes one of four outcomes: Satisfied, Not satisfied, Still open, or No answer received.

No answer received is a real outcome rather than a polite way of saying no. A previous landlord who never replies has told you nothing bad, and recording that as a failure would turn somebody else's silence into a mark against the applicant.

One check is kept per kind. Recording the same kind again replaces the outcome and records that it was you who made the current claim, and the earlier outcome stays in the audit trail. There is no score, no overall pass or fail, no ranking of applicants and no recommendation: the decision is entirely yours.

The decision, and correcting it

Record the decision takes Approved, Declined or Withdrawn by the applicant, with a reason. Once a decision exists, the check form closes and the heading becomes Correct the decision: recording a different one puts a correction beside the first and removes nothing. There is no way back to undecided.

The audit trail records the unit, the decision and who made it. It deliberately does not record the reason you typed or the applicant's name.

What is not here

- No form, link or email for the applicant. There is no applicant-facing anything: your office types what it found.
- No document upload on this screen. Supporting documents are listed by name, and they are attached through the CRM's own files rather than from here.
- No fee. Screening adds no charge of its own — it is part of the property-management module.
- No filter by unit or by status yet. The screen toggles between active and archived applications.
- No button that turns an approved application into a tenancy. Record the tenancy on the Tenancies screen.

Nothing is deleted. Archiving an application keeps every check, the decision, and who made it.

From the Help Center: **How does tenant screening work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

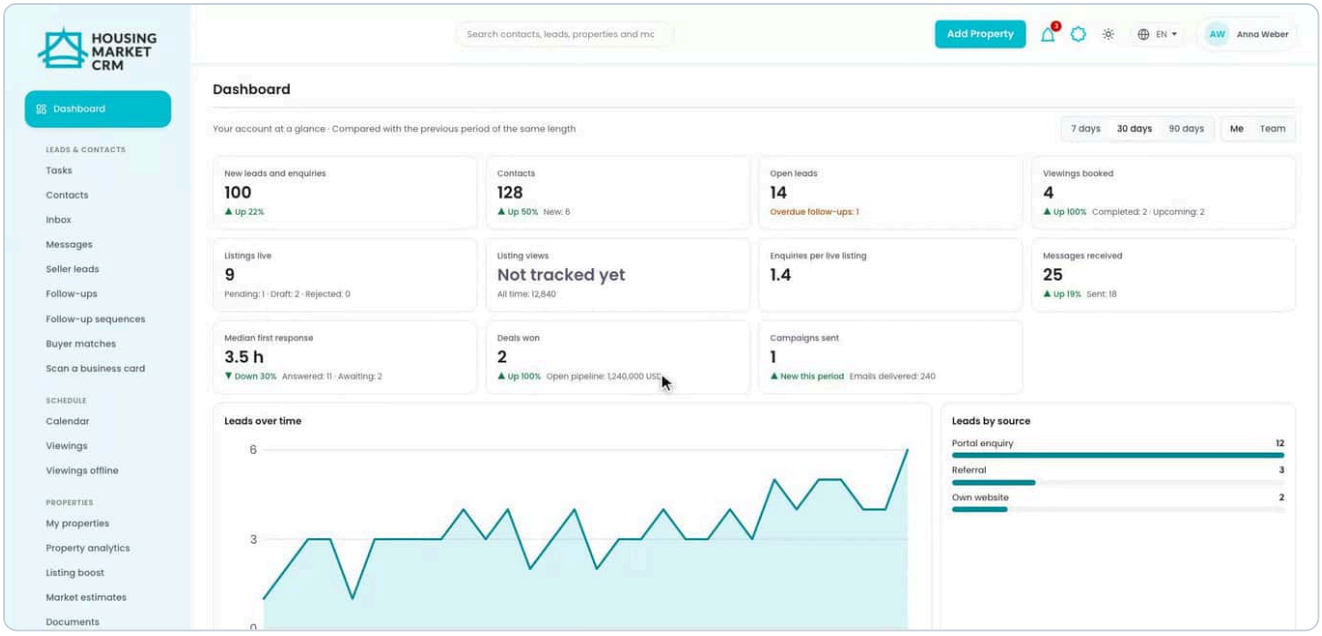


Figure 118.1 · Screen recorded 8 October 2026

2 Click **Tenant screening** in the left menu.

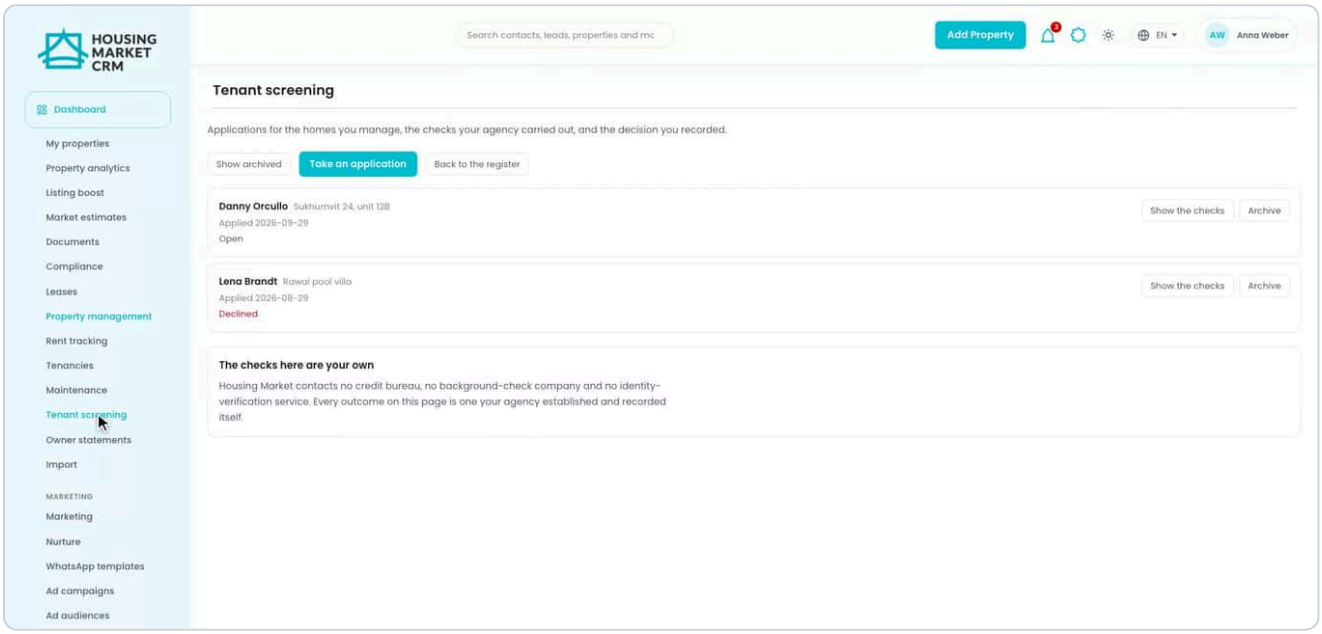


Figure 118.2 · Screen recorded 8 October 2026

3 The checks here are **your own**. Nothing runs a credit search.

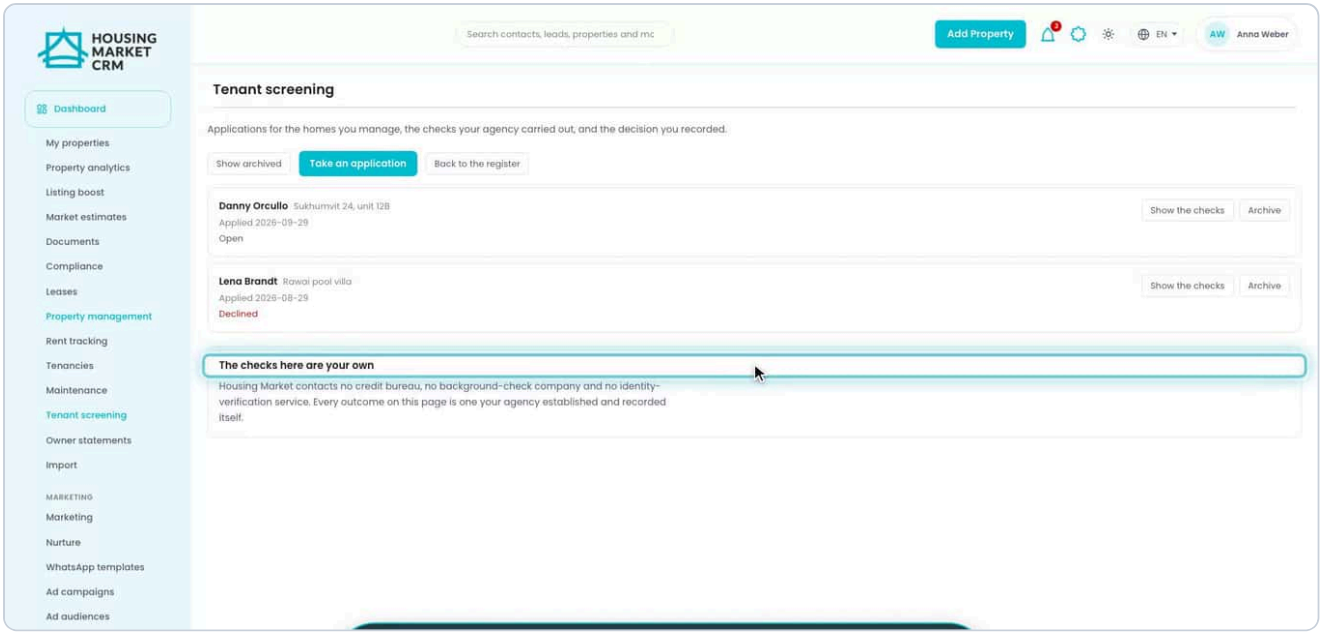


Figure 118.3 · Screen recorded 8 October 2026

4 **Take an application** for the home.

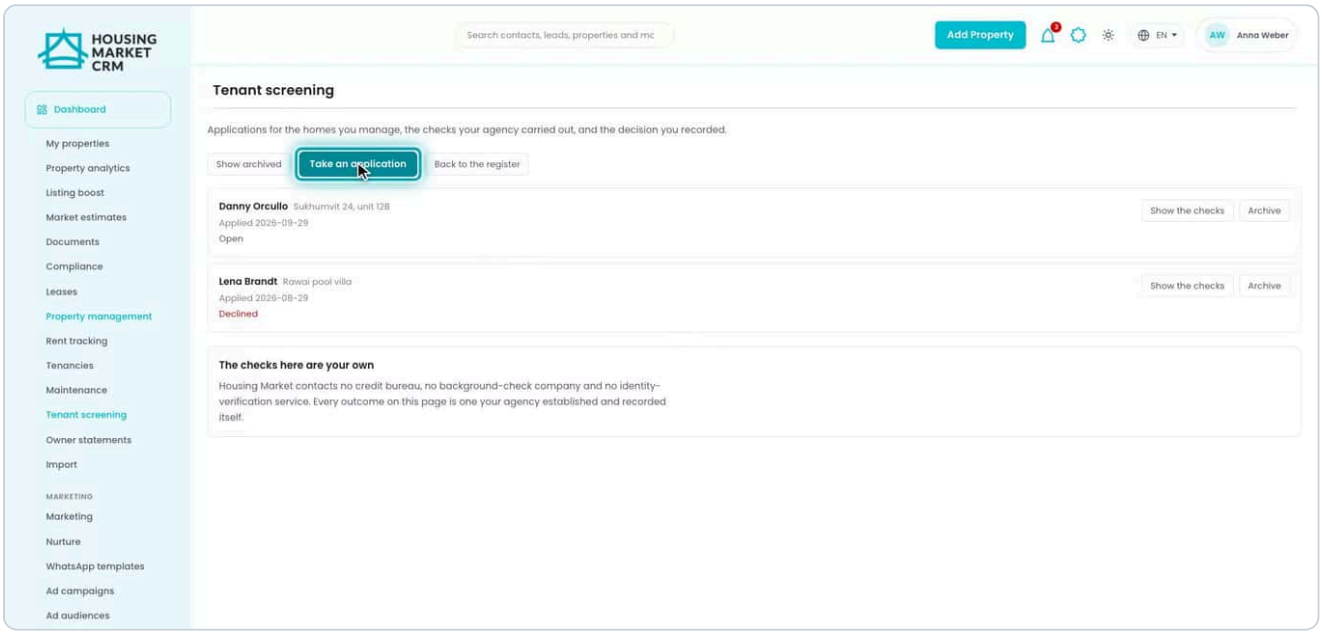


Figure 118.4 · Screen recorded 8 October 2026

5 Show the checks — and record each result.

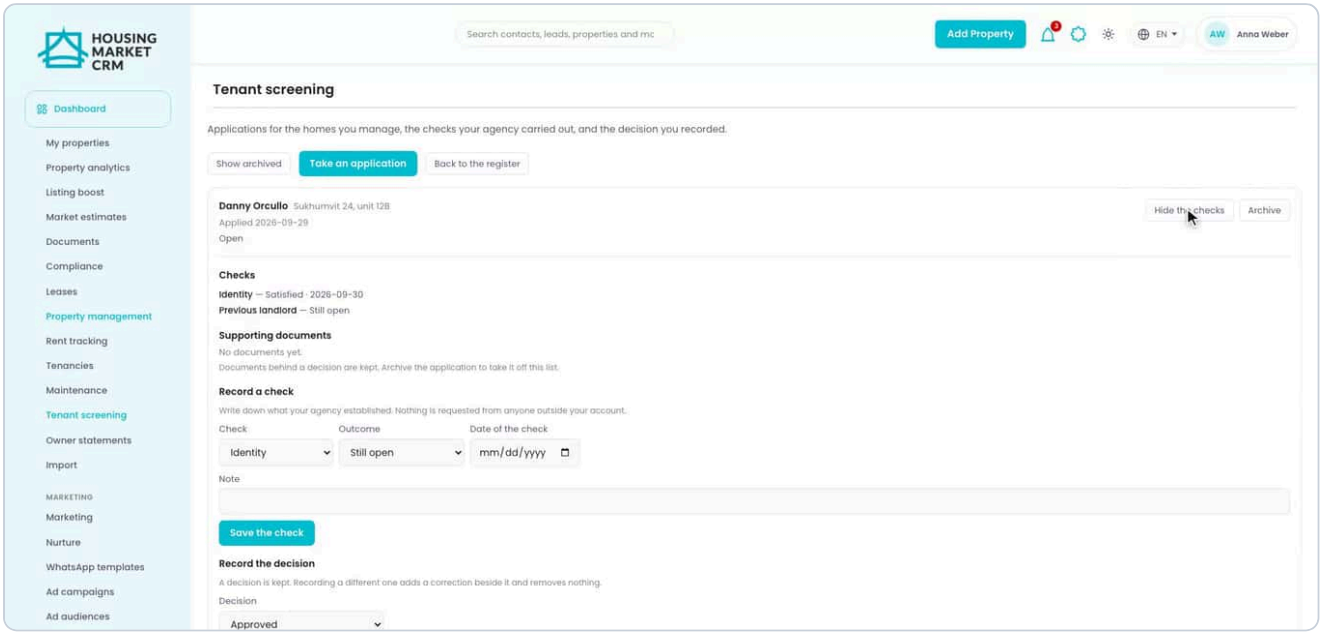


Figure 118.5 · Screen recorded 8 October 2026

6 Record a clean check too. Otherwise it looks like no check at all.

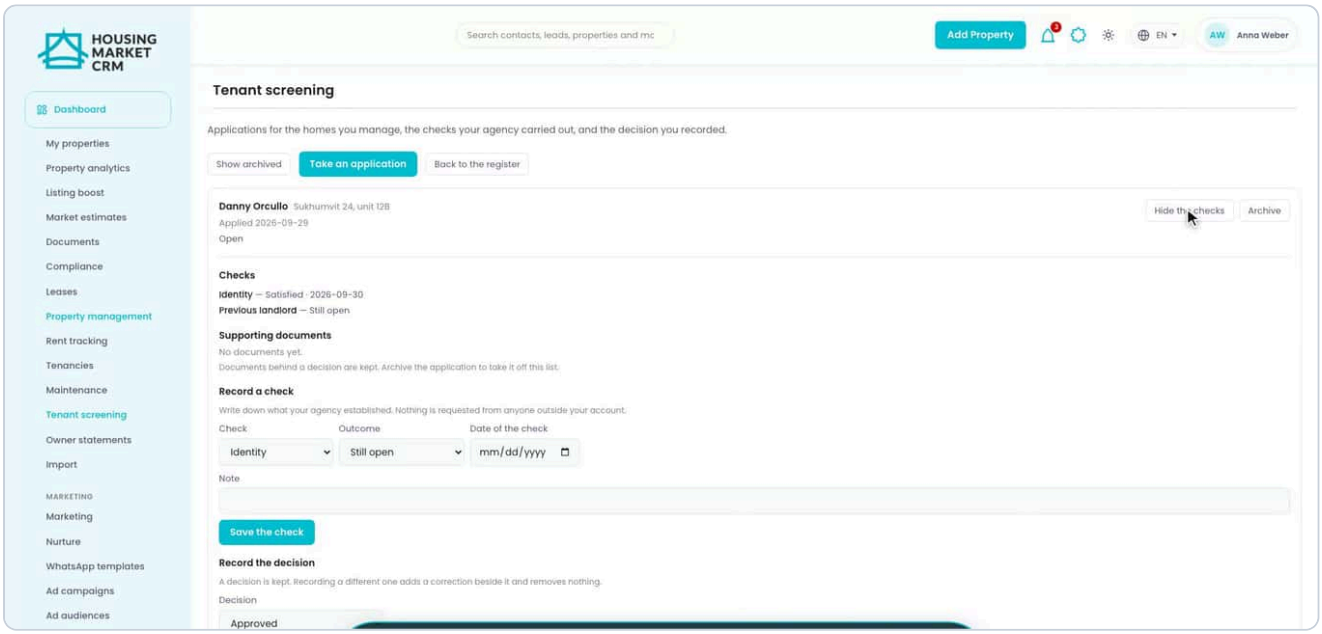


Figure 118.6 · Screen recorded 8 October 2026

7 Write the decision down **with its reason** — the landlord will ask.

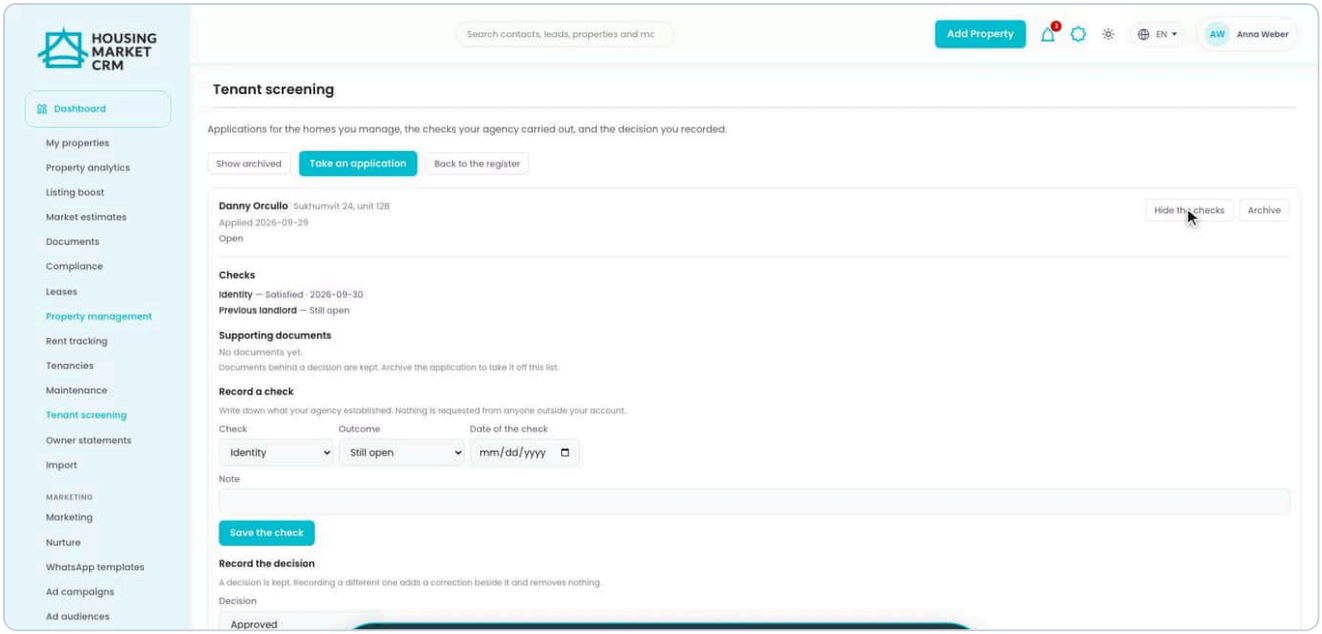


Figure 118.7 · Screen recorded 8 October 2026

8 Attach the **documents**, rather than describing them.

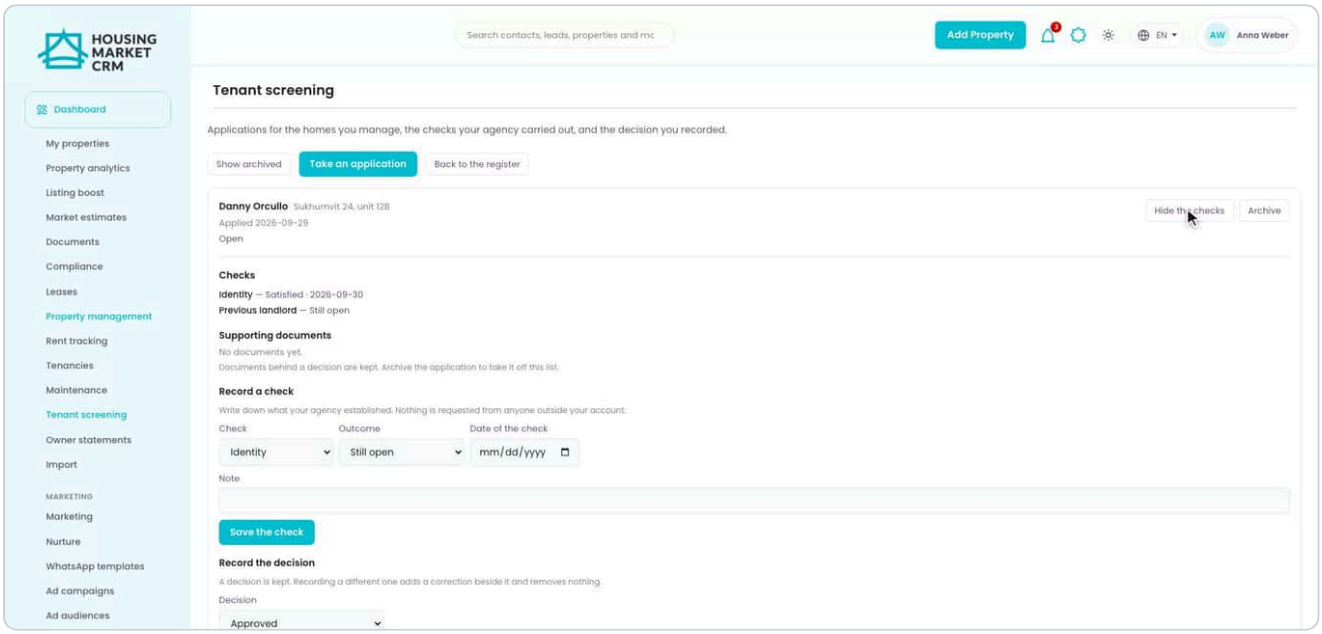


Figure 118.8 · Screen recorded 8 October 2026

9 One answer to *why did we take this tenant?* — for the whole office.

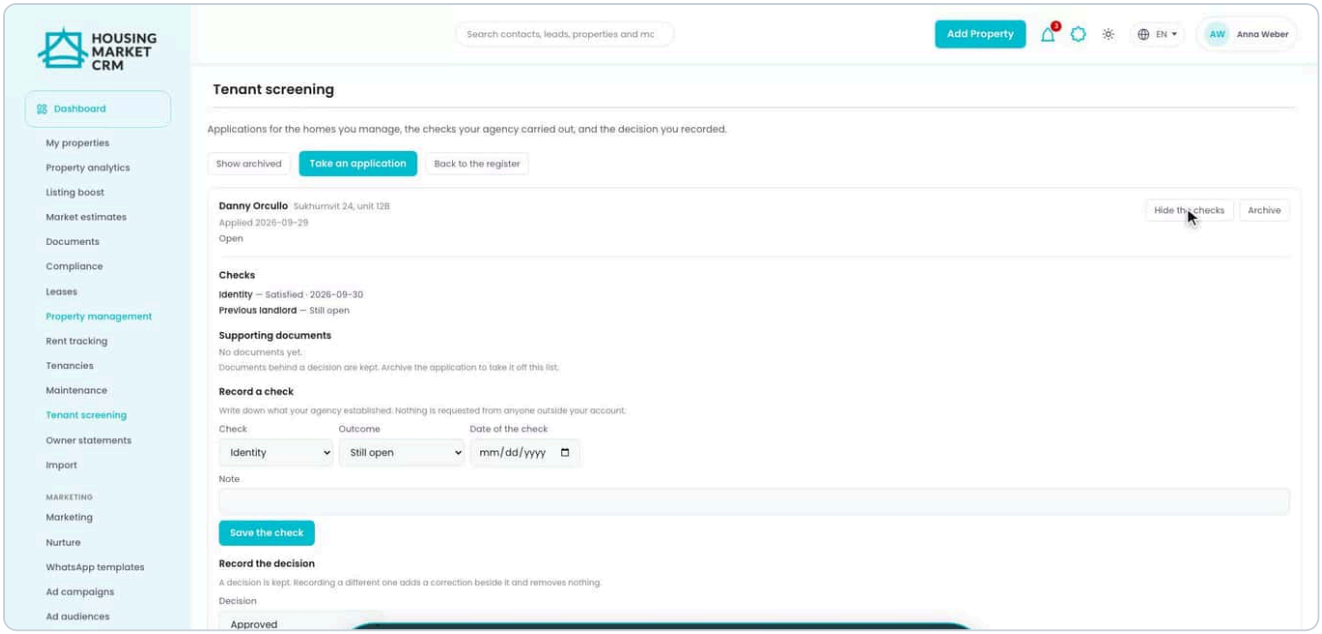


Figure 118.9 · Screen recorded 8 October 2026

119 CHAPTER 119

Owner statements

Pro and Business | For agents | Watch the video

OVERVIEW

A month's account of what an owner's homes were due and what your agency recorded as received, divided by each owner's recorded share. It reports and never pays: Housing Market takes no cut, deducts nothing and pays nobody.

Choose Owner statements under Property management. Pick a month and an owner and the CRM sets out what that owner's homes were due in that month, and what your agency has recorded as received.

A statement reports, it never pays

Housing Market sets out what your agency recorded and does nothing else with it. There is no payout, no remittance, no bank detail, no balance carried forward and no settlement. There is also no management fee, no commission, no deduction and no expense line — our prices are fixed and billed to your subscription, so nothing is ever taken out of an owner's rent. A statement in this product is a report, and the transfer to the owner happens wherever it happens today.

What it is built from

One card per home and per tenancy in force, so a home that changed tenant mid-month gets two cards rather than one blended figure. Each card shows the rent agreed in the tenancy that was in force that month — not the rent agreed since — how many dates fell due and for how much, how many of them are recorded as received, anything waived, and the deposit.

There is a separate line for rent received for earlier months: a charge that fell due in March and was recorded as received in April belongs to April's statement as arrears, and to March's as still outstanding. Keeping the two apart is what stops a late payment appearing to be a second one.

A home with nobody in it is still on the statement, marked Empty for the month, because an owner asking what their portfolio did needs the empty ones named rather than missing.

Ownership is a period, so a sale lands correctly

An owner's period on a home is what decides the statement, not who owns it now. A home sold in June still puts May on the seller's statement, and the card says "Owned until" or "Owned from" where a month was only partly theirs. Where one owner's period ends on the day the next one's begins, that is read as a handover rather than as two people owning it at once.

Shares, and the one case that is left undivided

Where an owner's share is recorded, their figures are that share of the home's — forty per cent stays forty per cent and is never rounded up to the whole. Where nobody else held the home at the same time, the whole amount is theirs and the card says so.

Where a home is co-owned and no share is recorded, the CRM divides nothing. The card shows the home's full figures, apportioned to nobody, the home is counted in a warning at the top, and the amount is held out of the totals in its own line rather than folded into them. An equal split would be an invented number that reads exactly like a checked one, and half of a month's rent is not a rounding error.

Totals are per currency, side by side. Nothing is converted and there is no combined grand total, because a single figure across two currencies would be a rate somebody has to have chosen.

Recording one

The month you are looking at is worked out each time you ask and is not stored. Record this statement keeps a copy of exactly those figures so that what you sent an owner stays readable later; the money on a recorded statement is frozen, while names are read fresh each time, so correcting a contact's spelling does not leave the old spelling on old statements.

If a statement already exists for that owner and month, the button becomes Run this month again. The old one is archived rather than removed and the new one records which it replaces.

What is not here

- No PDF, no spreadsheet, no print view and no email. Recording a statement keeps it inside the CRM; sending it to the owner is still something you do yourself.
- No owner login. There is no owner portal, and an owner cannot sign in to read this.
- No batch run. One owner and one month at a time.
- No maintenance costs. Repairs are recorded on the maintenance screen and never appear on a statement, because no cost is recorded there either.

Recorded shares are set on the unit's ownership rather than on the statement. If the warning names homes with no share recorded, that is what it is asking for.

From the Help Center: **What is an owner statement?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

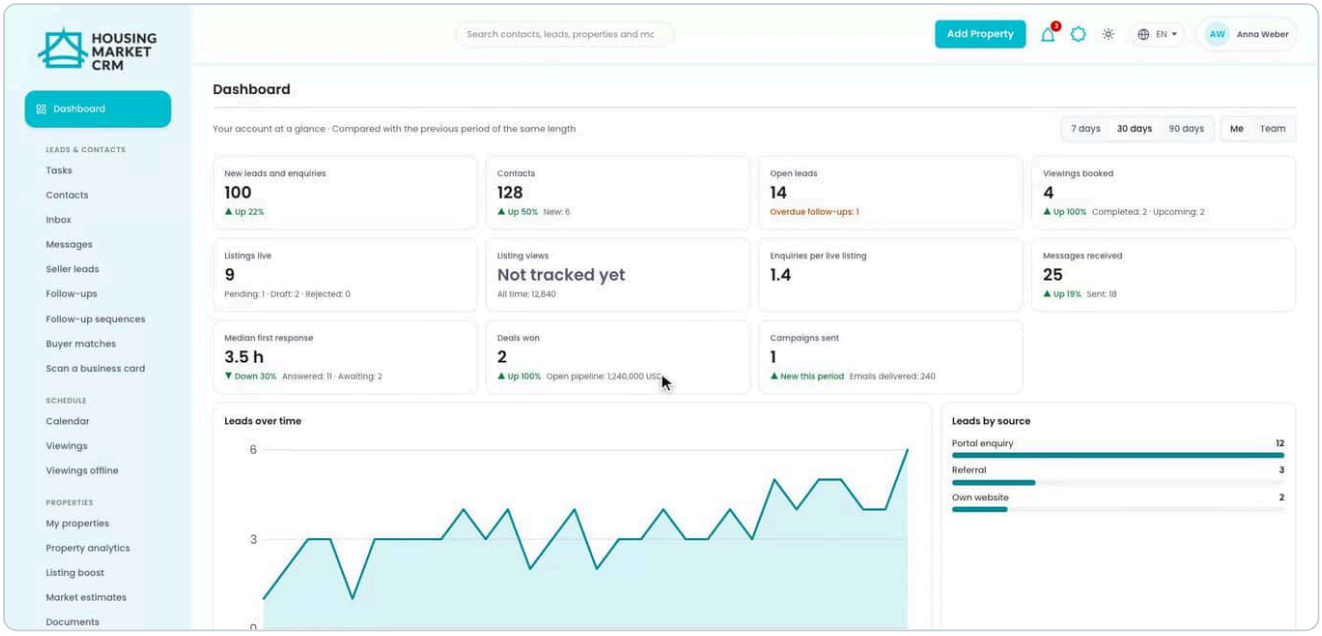


Figure 119.1 · Screen recorded 8 October 2026

2 Click **Owner statements** in the left menu.

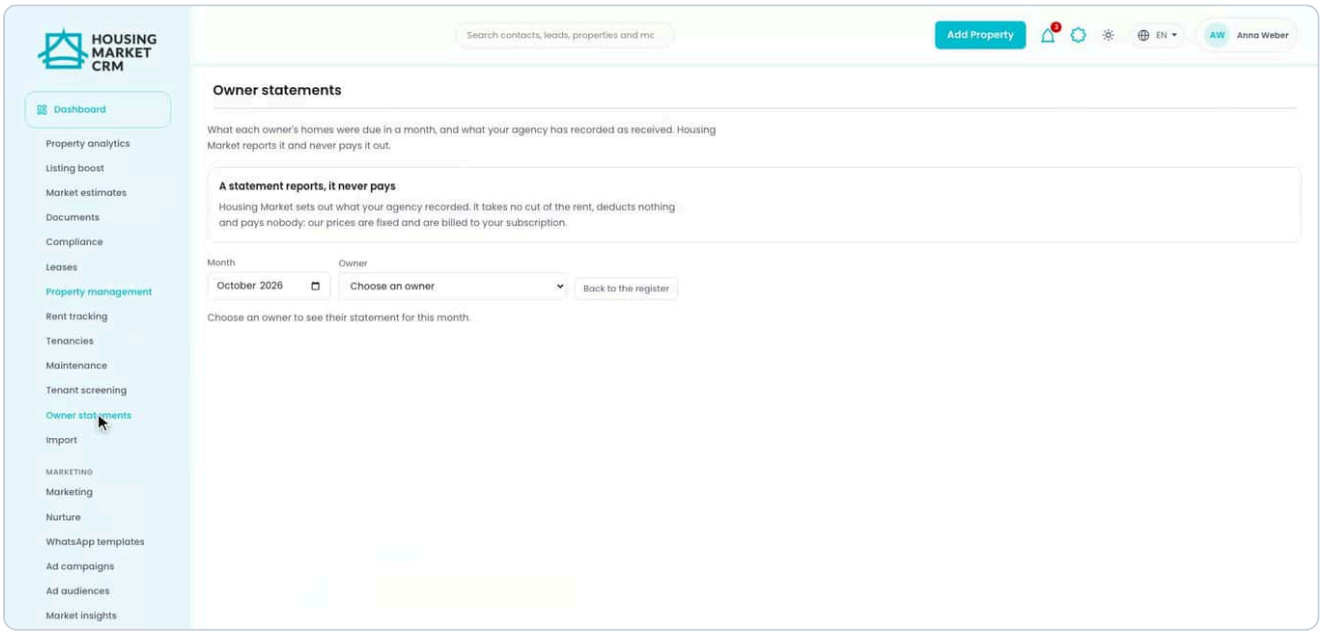


Figure 119.2 · Screen recorded 8 October 2026

3 A statement **reports**. It takes no cut and pays nobody.

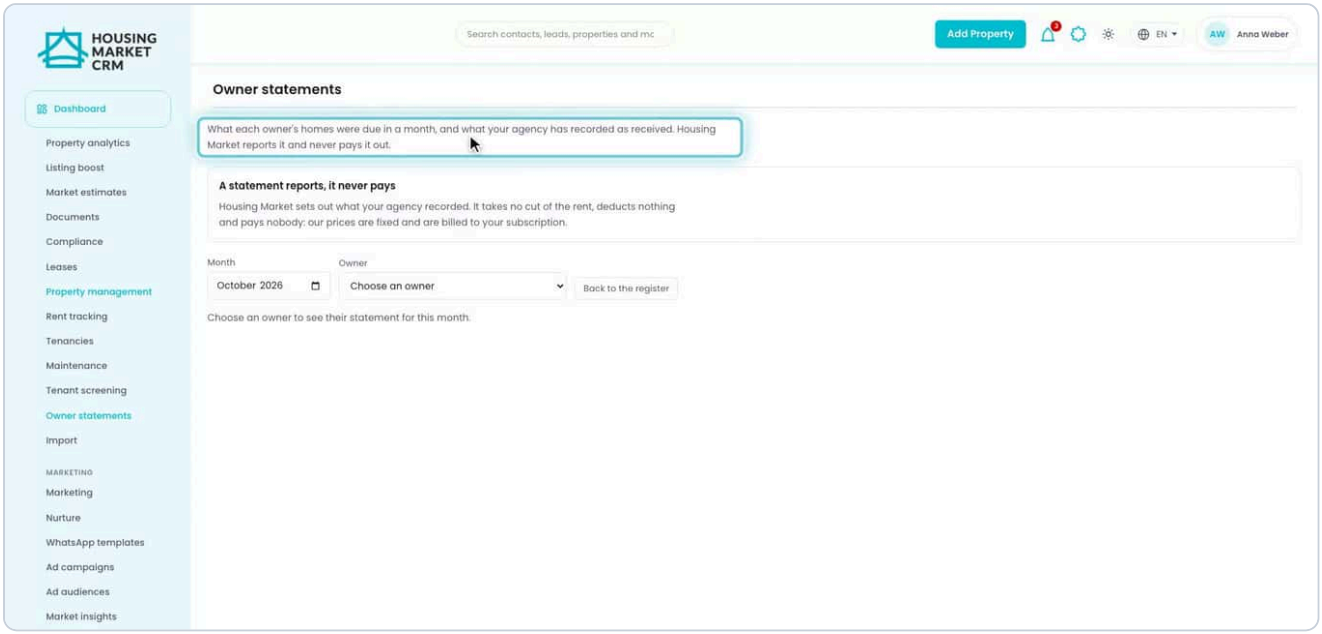


Figure 119.3 · Screen recorded 8 October 2026

4 Choose the **owner**.

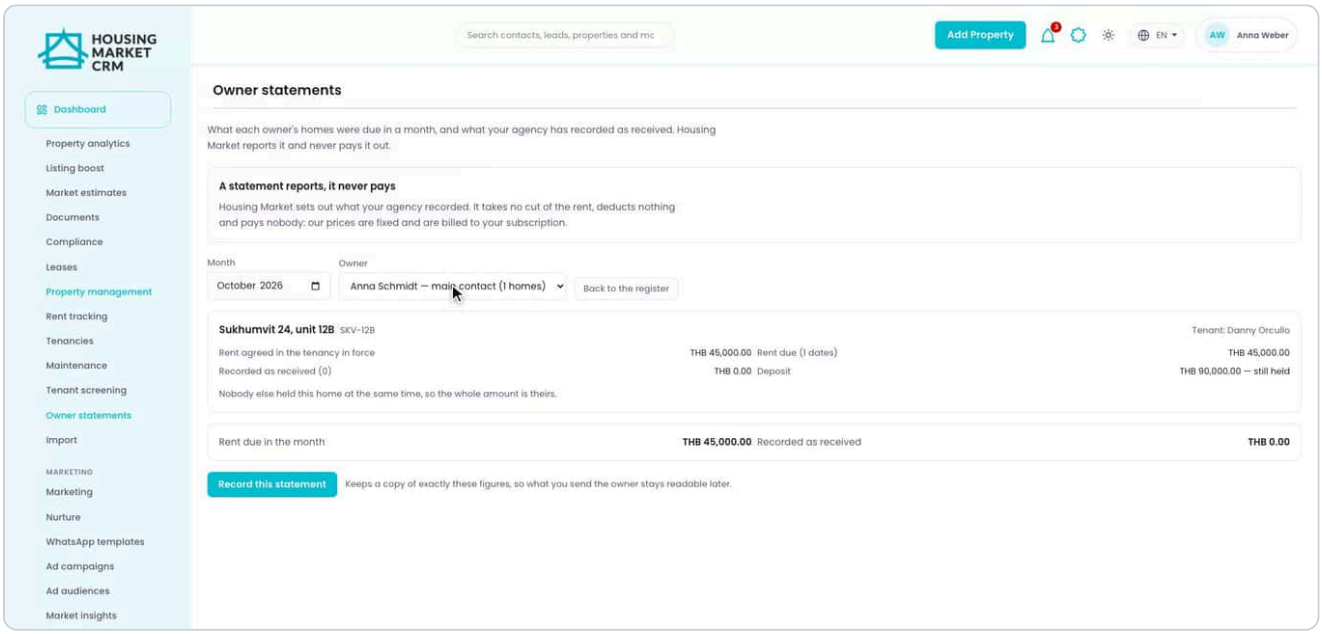


Figure 119.4 · Screen recorded 8 October 2026

5 This is a **preview** — computed, and written nowhere.

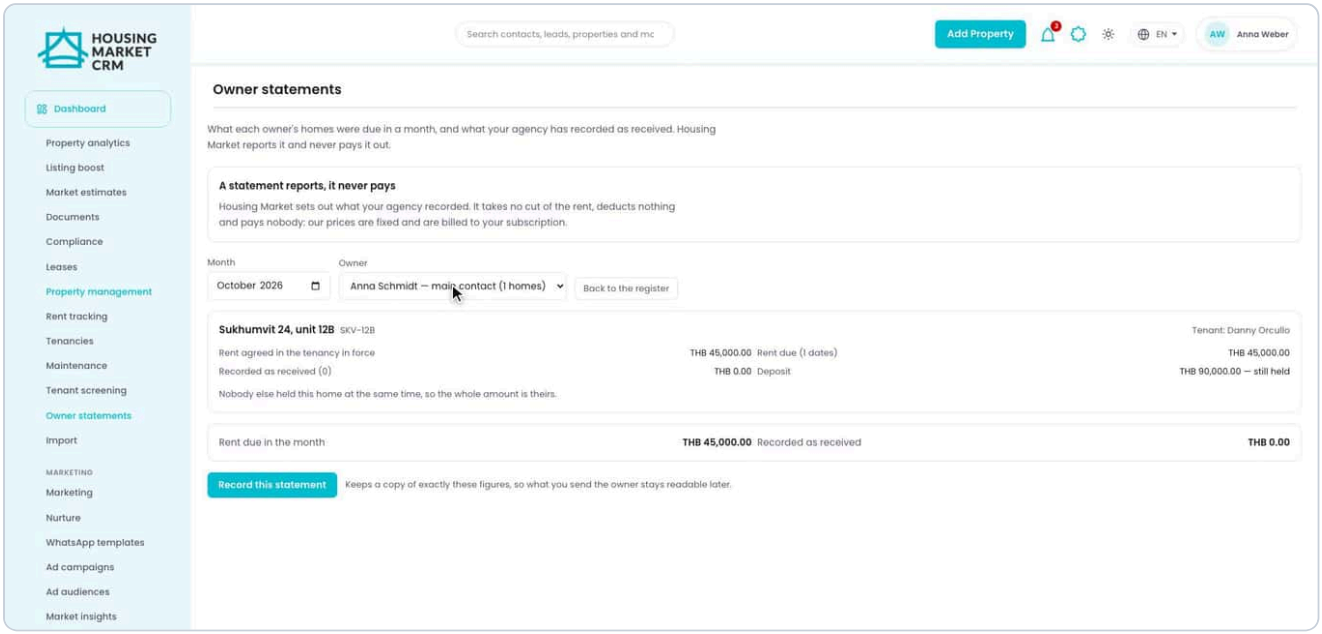


Figure 119.5 · Screen recorded 8 October 2026

6 Recording it is the separate act: *this is what I sent the owner*.

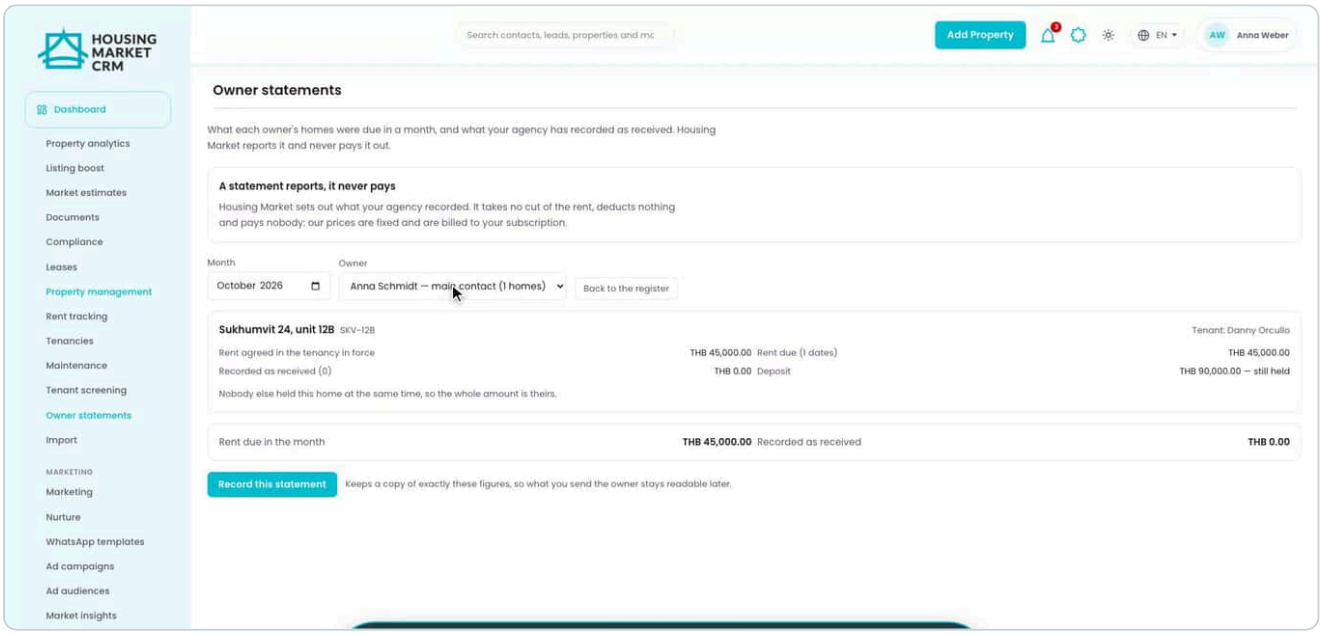


Figure 119.6 · Screen recorded 8 October 2026

7 Re-running the month **supersedes** it — the first is archived, never edited.

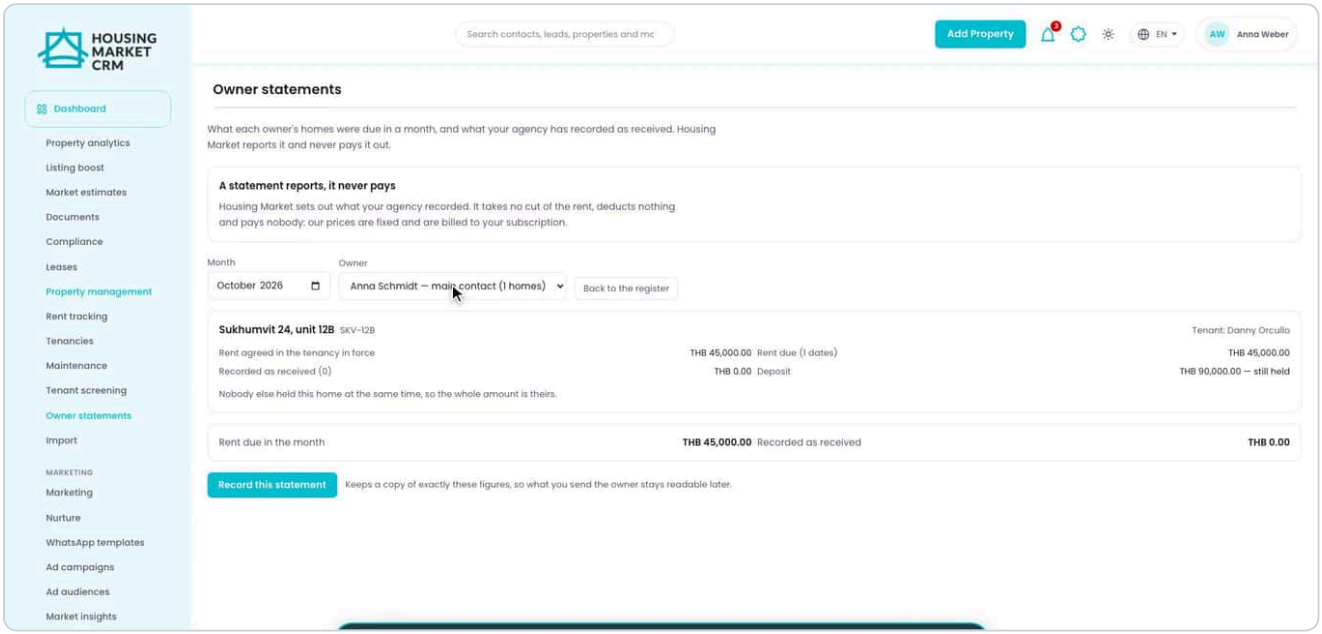


Figure 119.7 · Screen recorded 8 October 2026

8 If a co-owner's share was never recorded, the statement **says so** —.

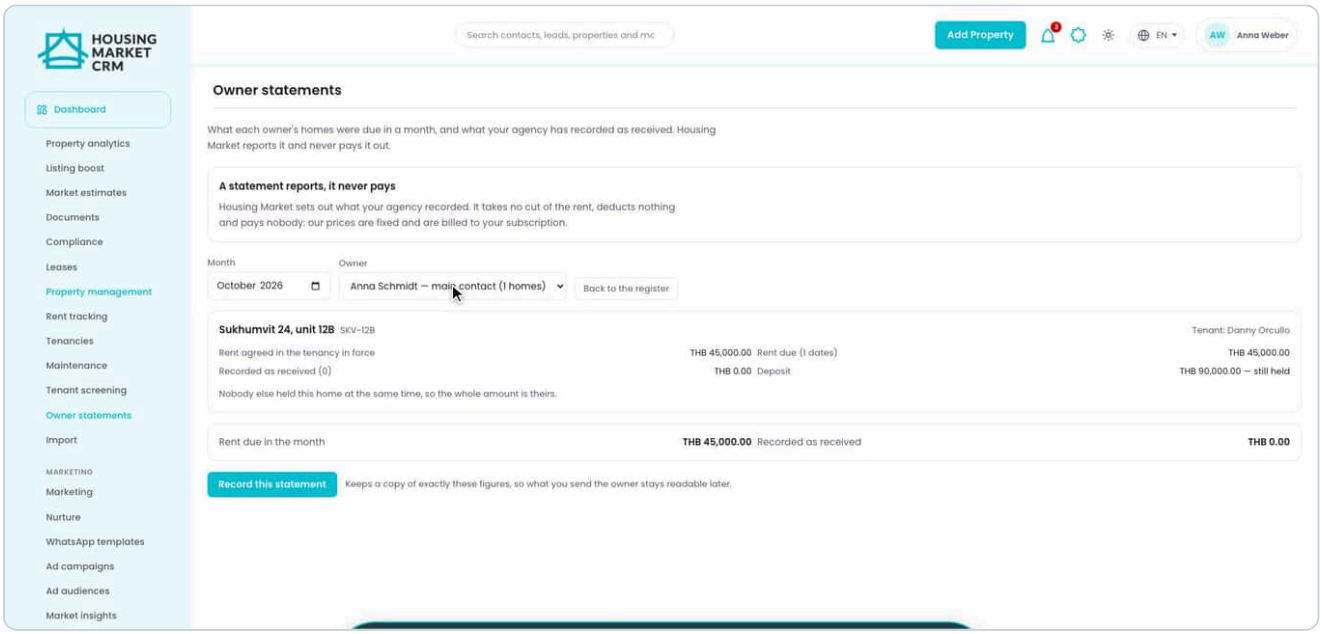


Figure 119.8 · Screen recorded 8 October 2026

9 and gives the home's full figures, rather than inventing a half.

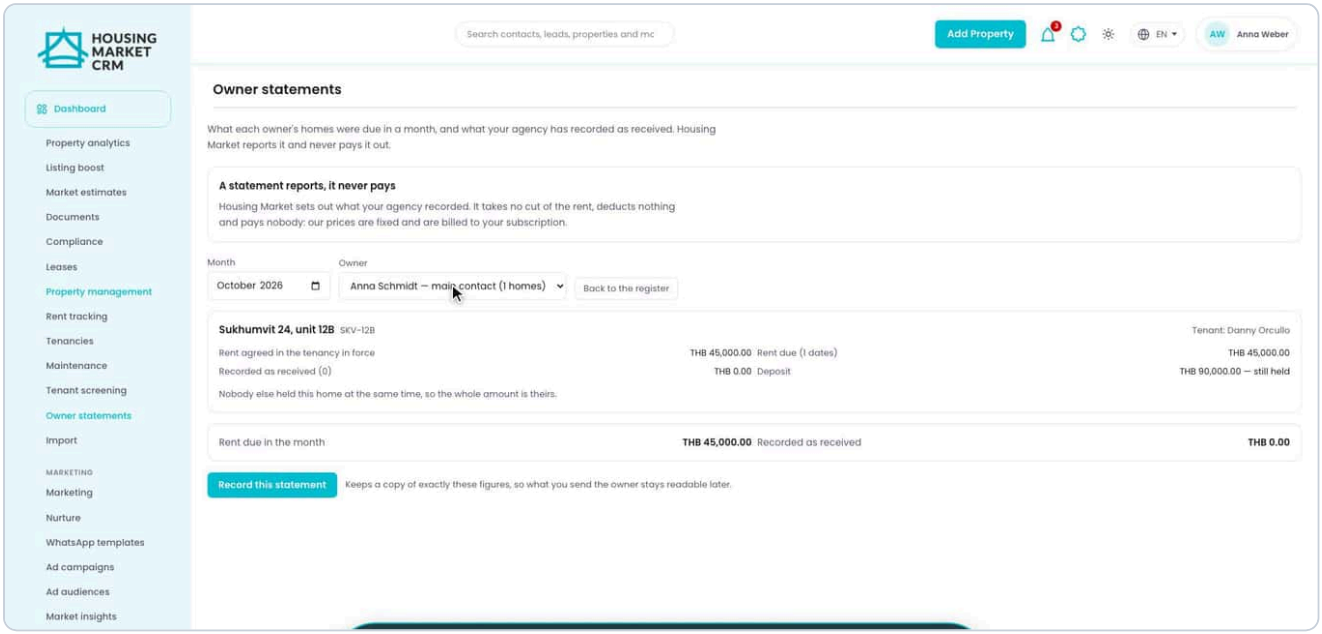


Figure 119.9 · Screen recorded 8 October 2026

GOOD TO KNOW

IMPORTANT No. Housing Market Group is software. It records what is due and what you have recorded as received, and never takes a payment, holds money or moves it between an owner and a tenant.

Help Center: Does Housing Market collect rent from my tenants?

120 CHAPTER 120

Remind a tenant about rent

Pro and Business | For agents | Watch the video

OVERVIEW

Yes, where your account has them: Remind tenant on a rent charge, and Send work order on a maintenance request. Rent reminders can also go out on their own, but only after your agency switches that on.

Remind tenant emails the tenant from your agency that your records show an amount as not yet received, and to ignore the message if it has been paid. It is sent by a person in your agency when they choose it. A charge can be reminded about at most once every few days, and each reminder is recorded.

Automatic rent reminders

Rent reminders can also be sent for you, but nothing is sent until your agency switches it on. In Rent tracking, the card Automatic reminders to tenants has the choice Send rent reminders to my tenants automatically, the number of days before the due date and the number of days after it (0 for none, up to 30), and the language of the email.

Each reminder goes out in your name, from your agent identity, and replies come to you. A tenant gets at most one email for each reminder on each rent, only while the rent is still shown as not received, and during the day in your agency’s time zone. A tenant with no email address on file is skipped, and a rent you reminded the tenant about by hand a few days ago is left alone. The message says what your records show and asks the tenant to ignore it if they have already paid; it never says they are late. The card shows how many reminders were sent in the last 30 days. Housing Market never collects the rent: a reminder only tells the tenant what your records show.

Send work order emails the contractor the request, its priority, the unit’s address and your agency’s contact details. It carries no amount: Manager never handles payments.

From the Help Center: **Can I remind a tenant about rent or send a work order to a contractor?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

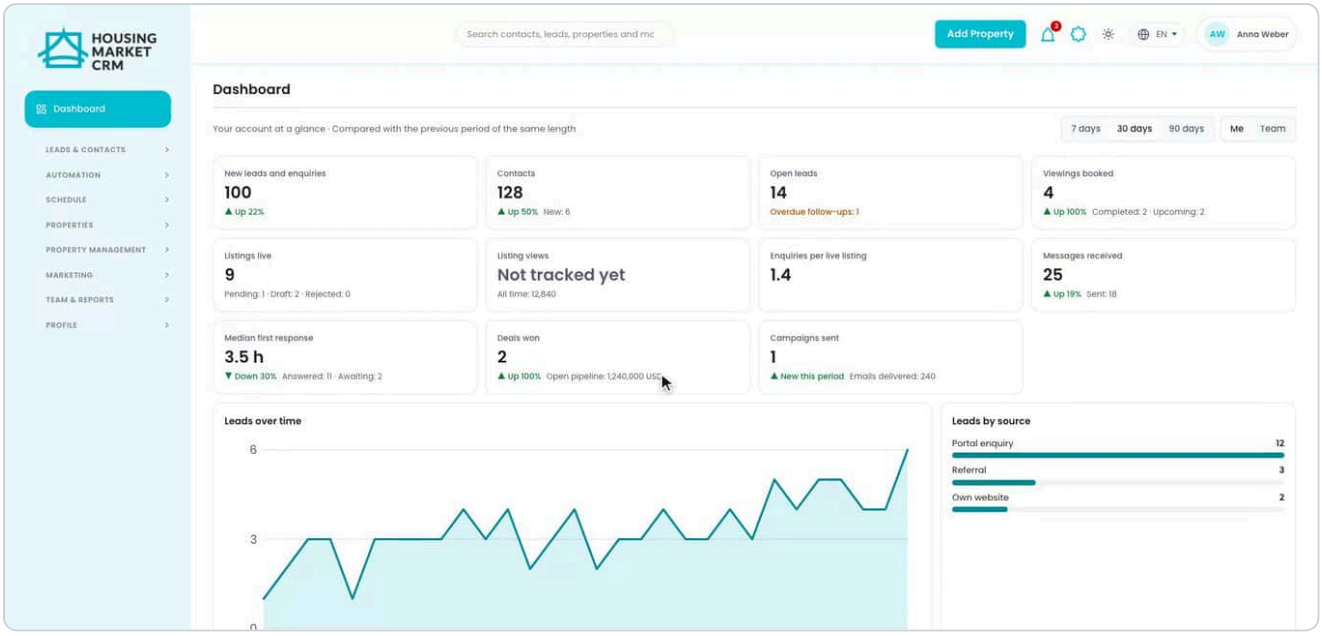


Figure 120.1 · Screen recorded 19 October 2026

2 Open **Property management** in the left menu.

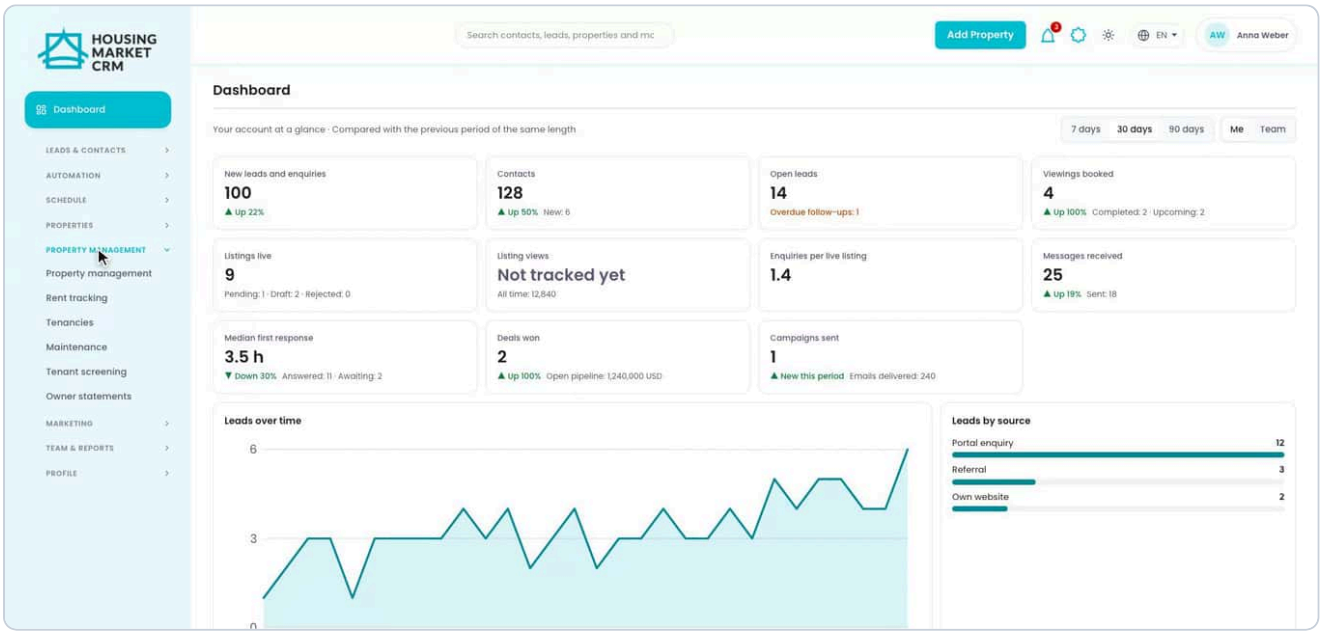


Figure 120.2 · Screen recorded 19 October 2026

3 Click **Rent tracking**.

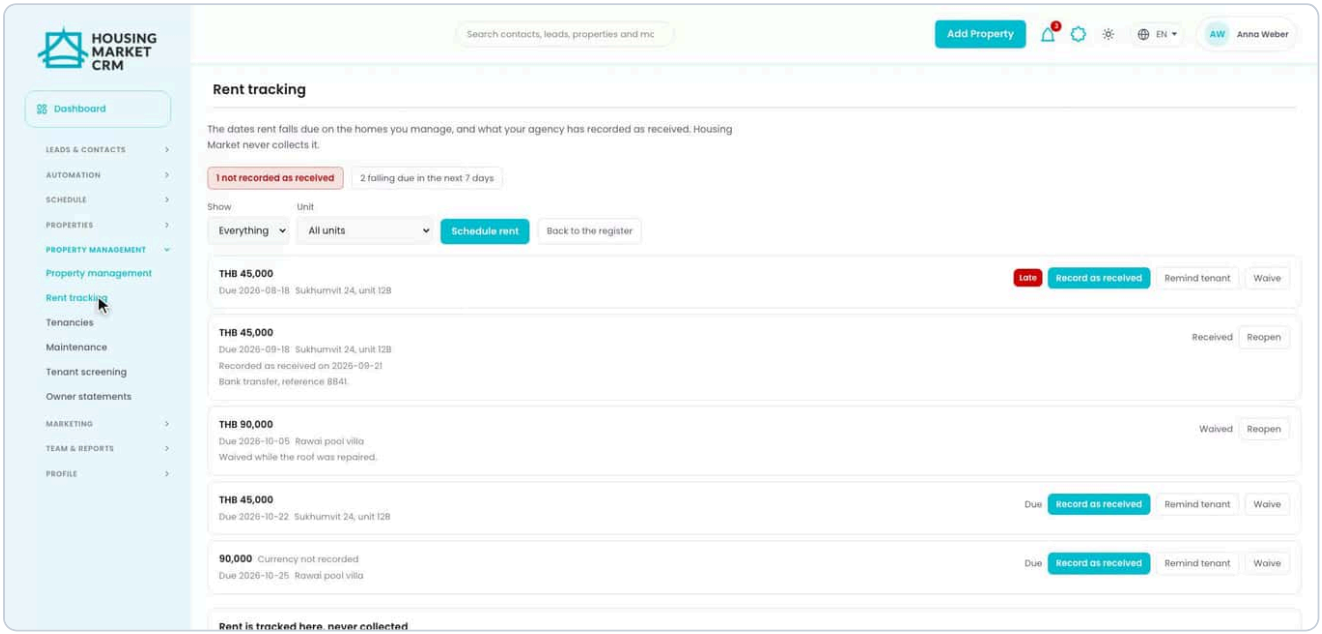


Figure 120.3 · Screen recorded 19 October 2026

4 Your agency's record. Housing Market **never collects rent**.

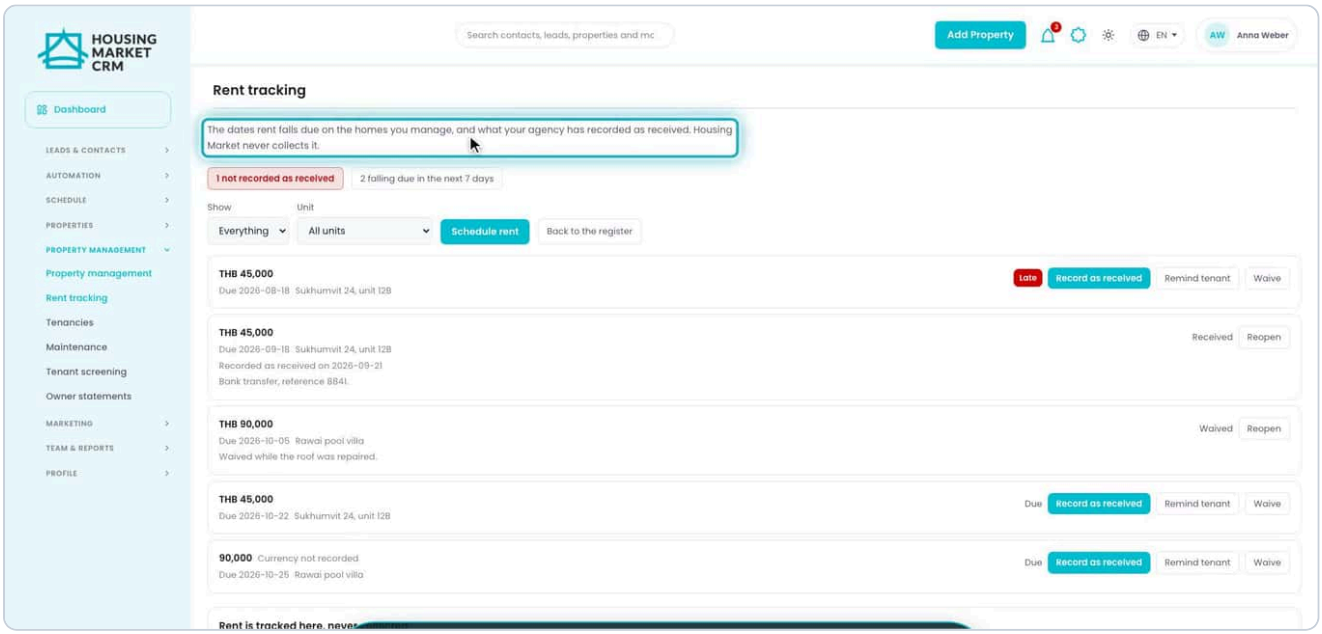


Figure 120.4 · Screen recorded 19 October 2026

5 This month is **late**.

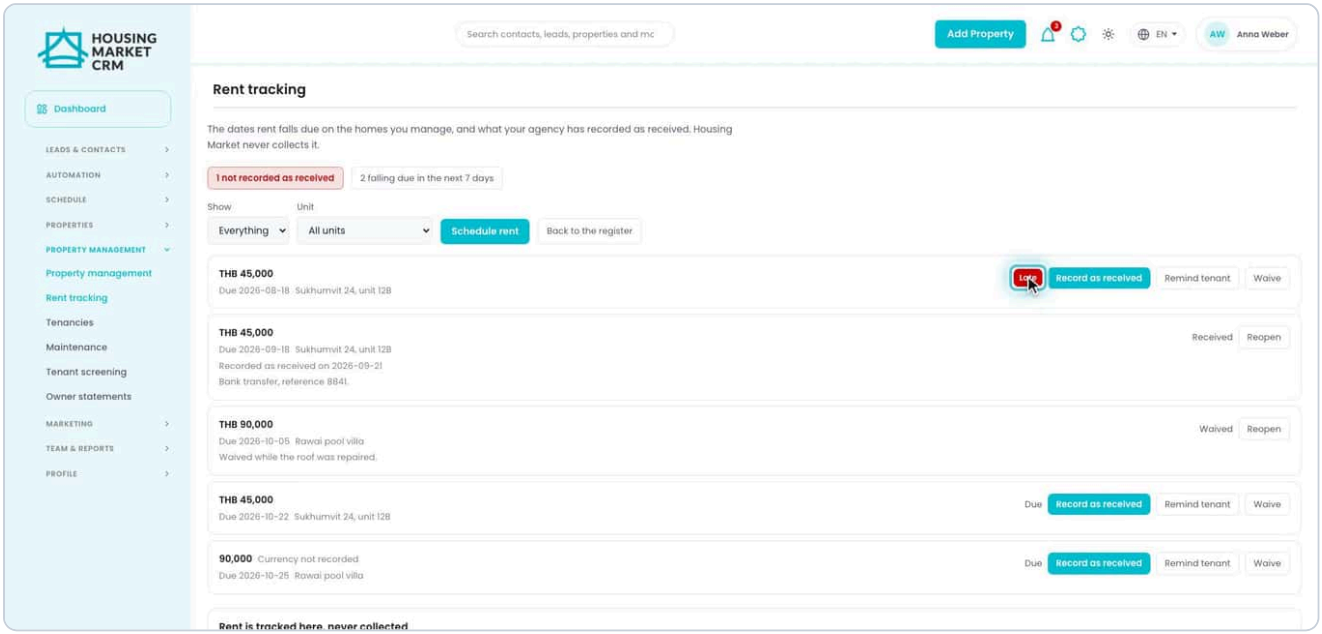


Figure 120.5 · Screen recorded 19 October 2026

6 **Remind tenant** appears on rent that is still **due**.

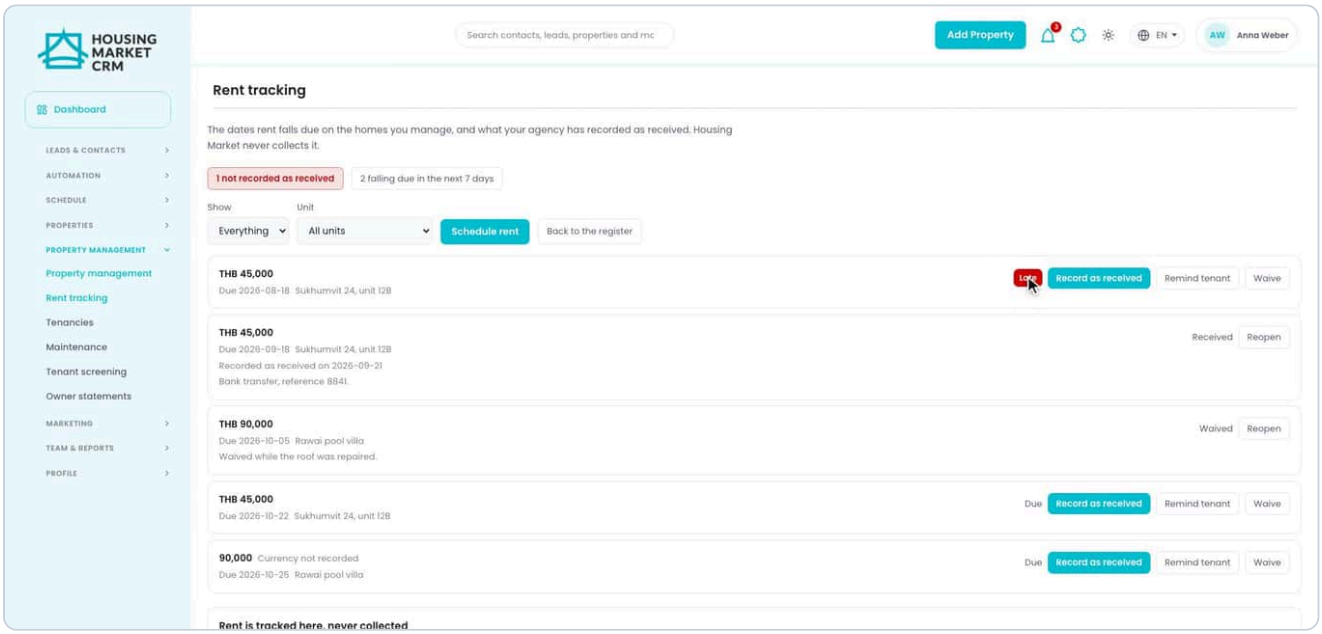


Figure 120.6 · Screen recorded 19 October 2026

7 Click **Remind tenant**.

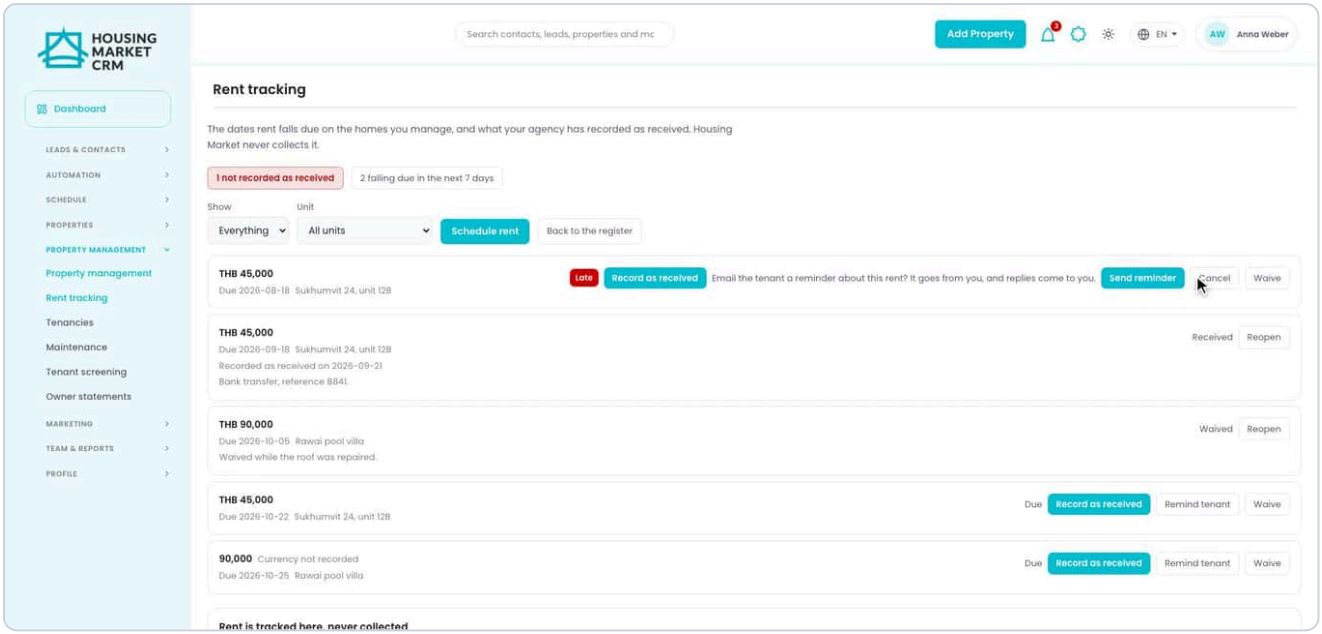


Figure 120.7 · Screen recorded 19 October 2026

8 It goes **from you**, and replies **come to you**.

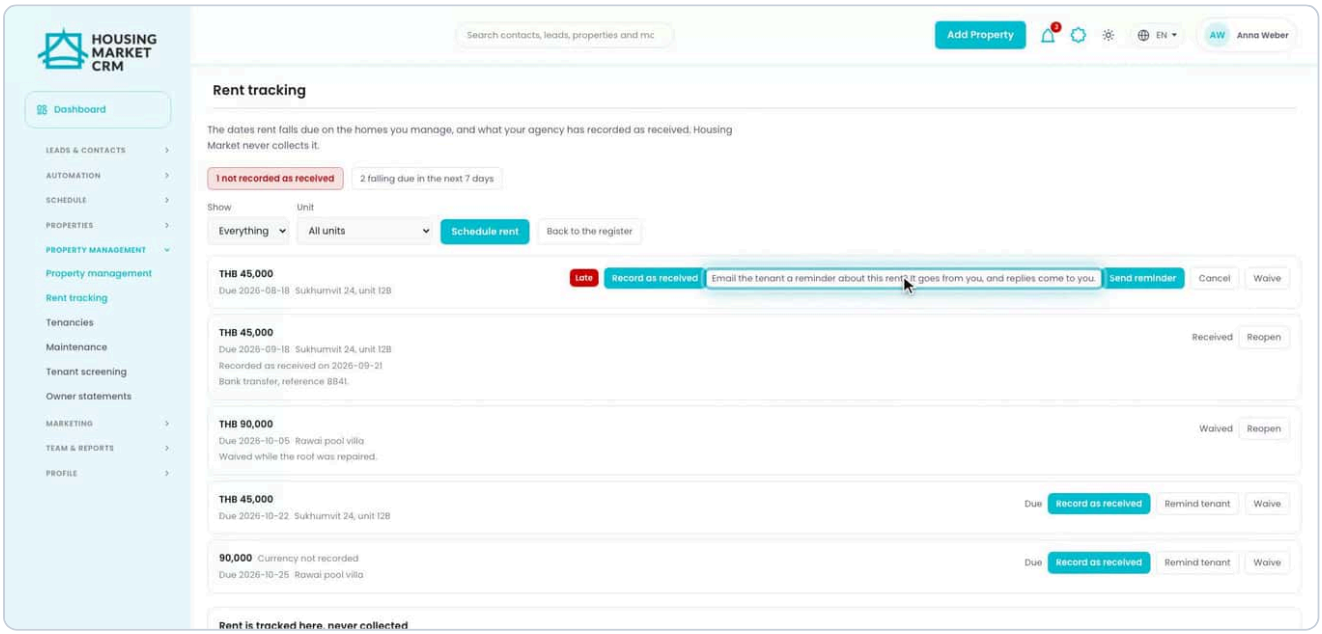


Figure 120.8 · Screen recorded 19 October 2026

9 Click **Send reminder** to confirm.

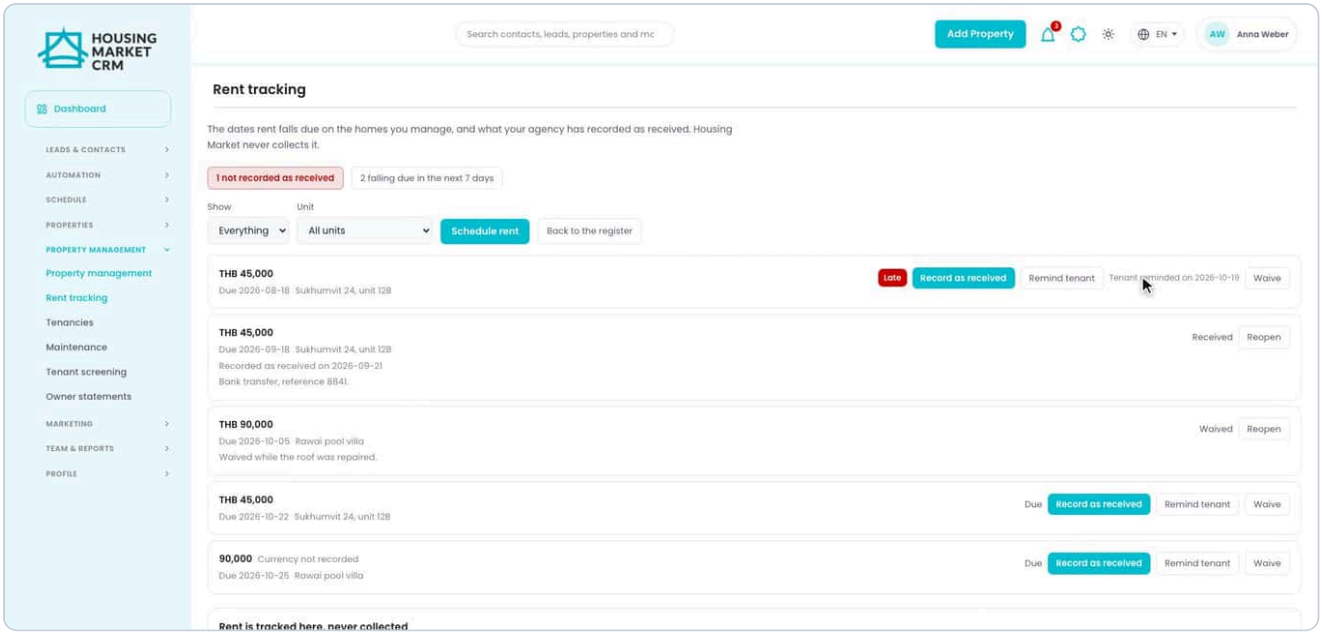


Figure 120.9 · Screen recorded 19 October 2026

10 The charge now shows **when the tenant was reminded**.

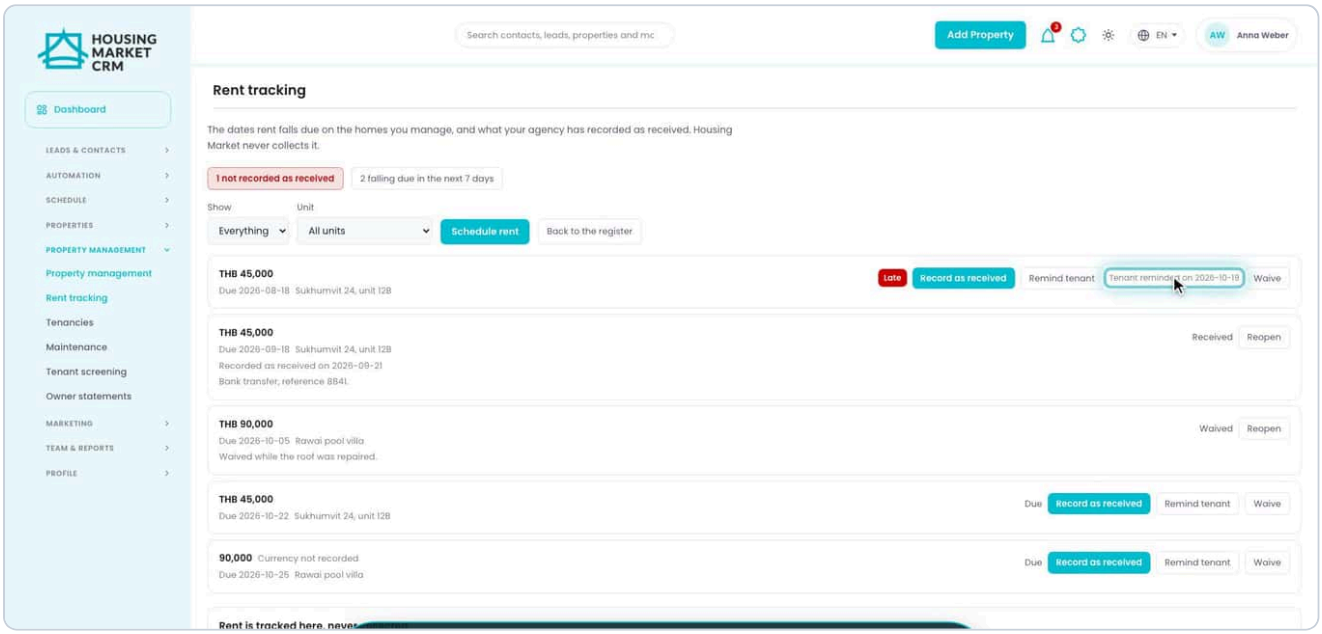


Figure 120.10 · Screen recorded 19 October 2026

11 Nothing is ever sent **without you** confirming it.

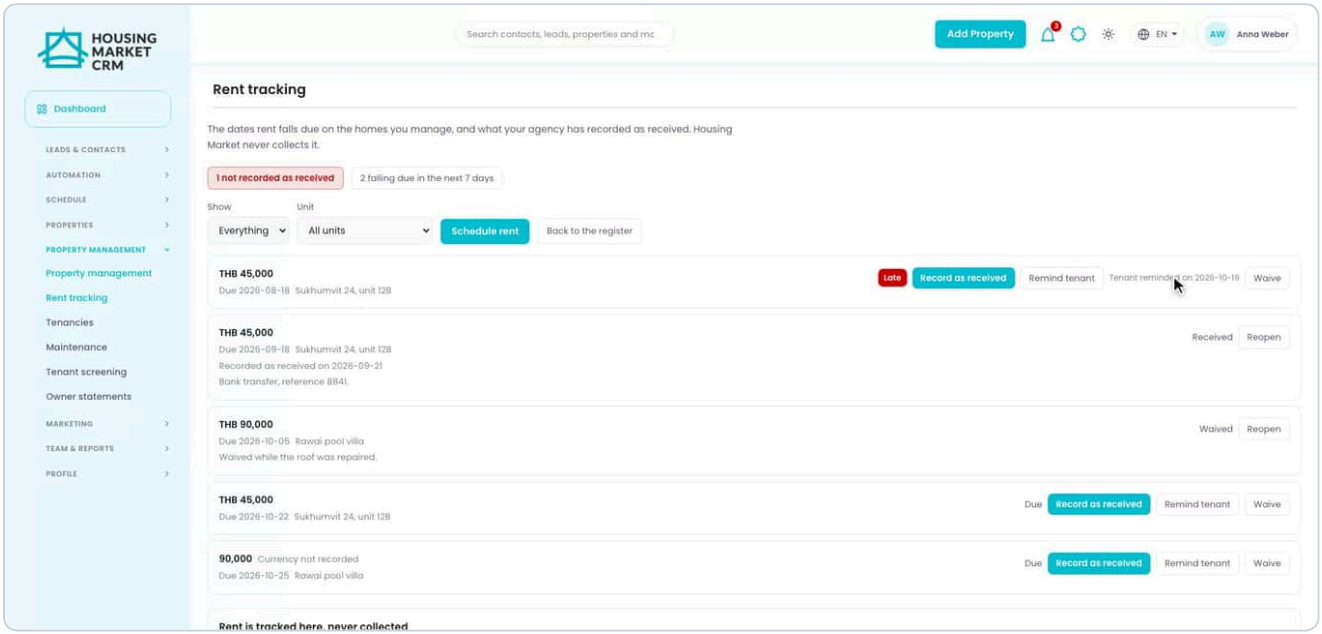


Figure 120.11 · Screen recorded 19 October 2026

RELATED HELP CENTER ARTICLES

Does Housing Market collect rent from my tenants?	faq.housingmarketgroup.com/faq/does-housing-market-collect-rent-from-my-tenants

121 CHAPTER 121

Send a work order to a contractor

Pro and Business | For agents | Watch the video

OVERVIEW

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STEP BY STEP

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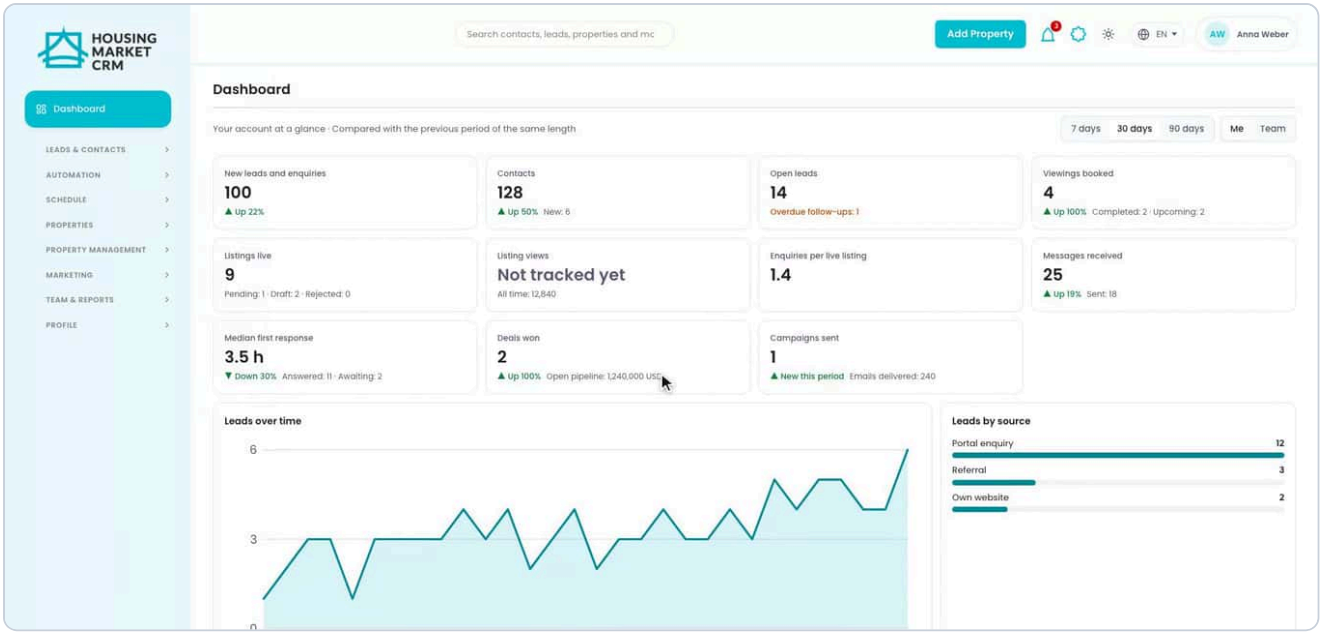


Figure 121.1 · Screen recorded 19 October 2026

2 Open **Property management** in the left menu.

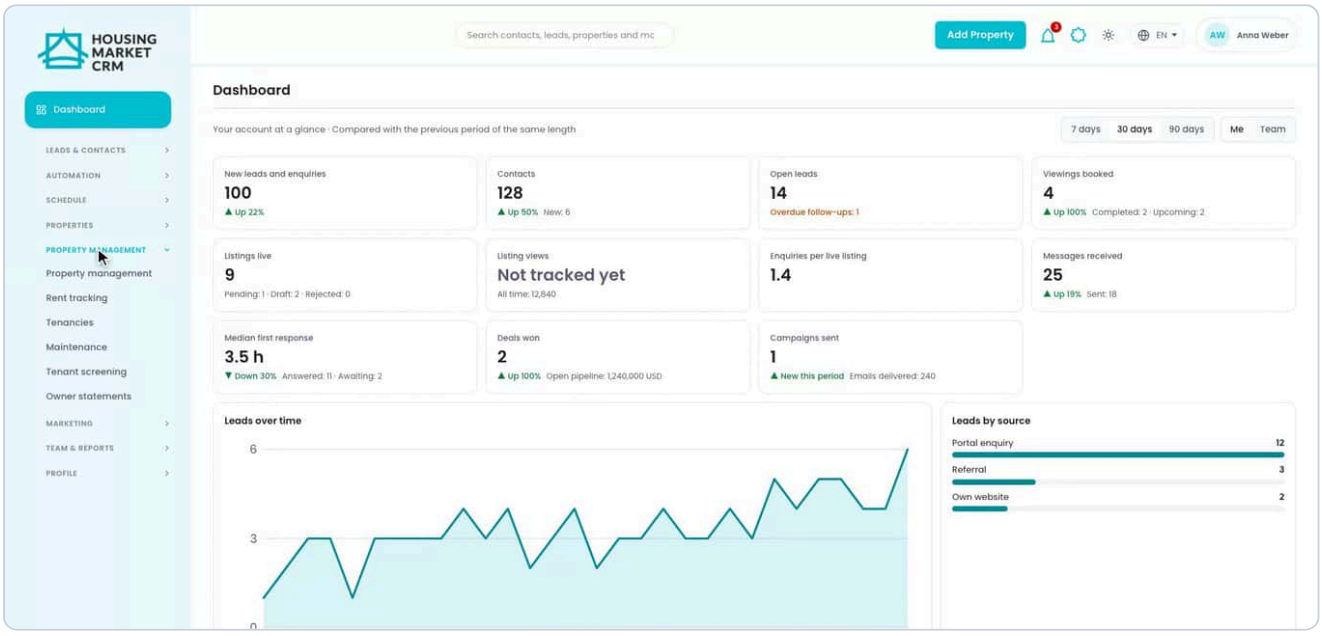


Figure 121.2 · Screen recorded 19 October 2026

3 Click **Maintenance**.

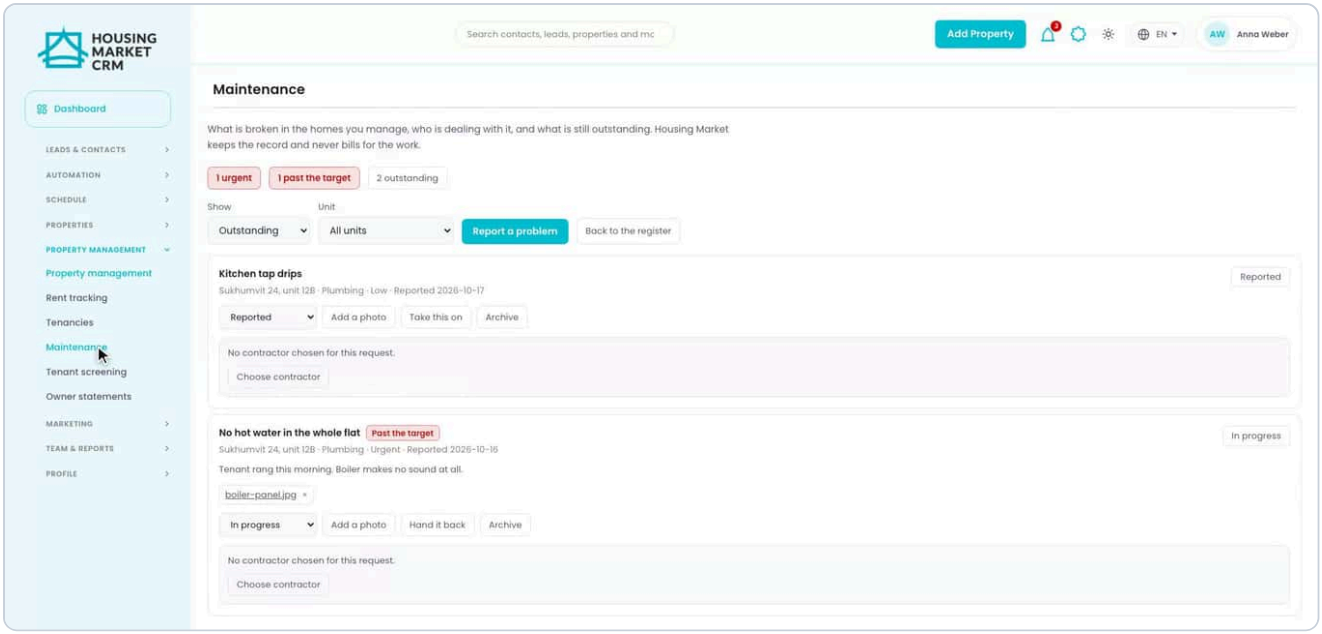


Figure 121.3 · Screen recorded 19 October 2026

4 Recorded here, **never billed** by Housing Market.

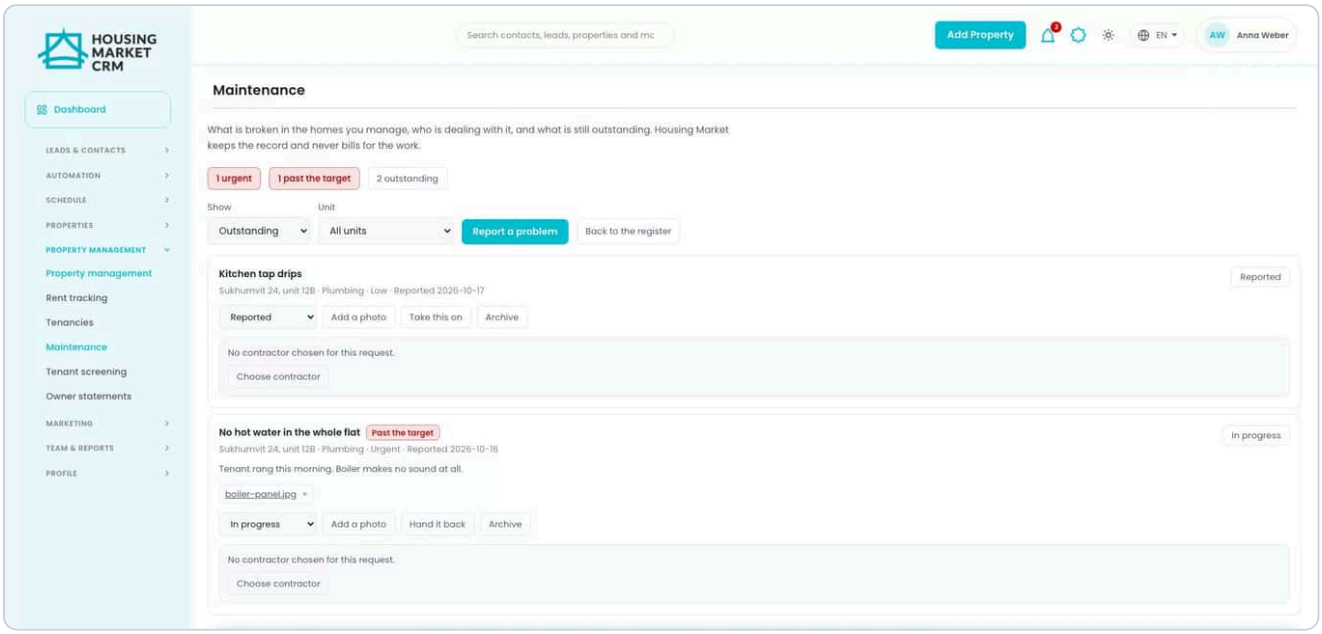


Figure 121.4 · Screen recorded 19 October 2026

5 This request has **no contractor** yet.

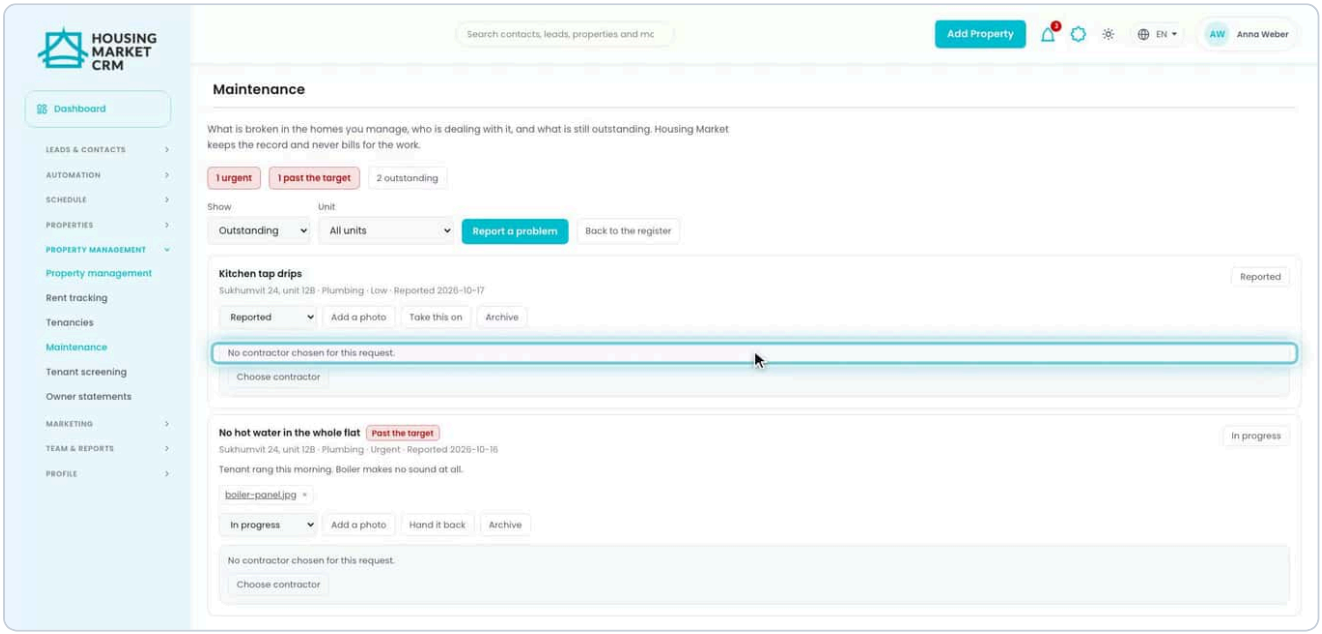


Figure 121.5 · Screen recorded 19 October 2026

6 Click **Choose contractor**.

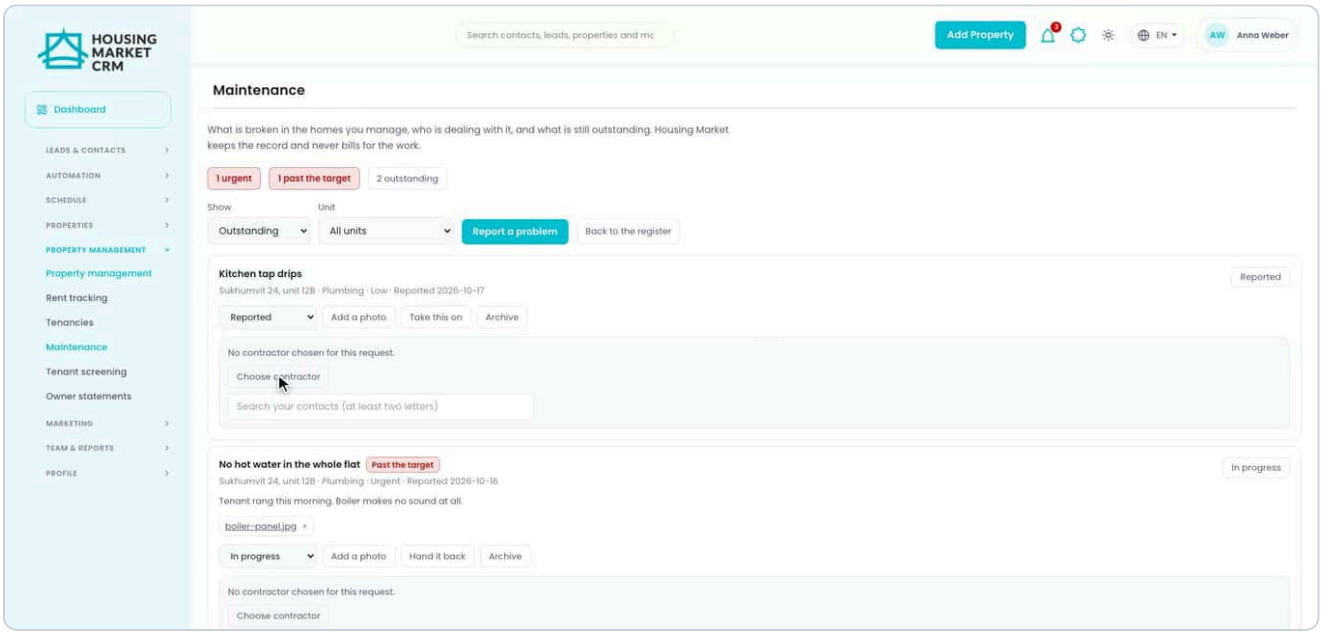


Figure 121.6 · Screen recorded 19 October 2026

7 Search your **own contacts** by name.

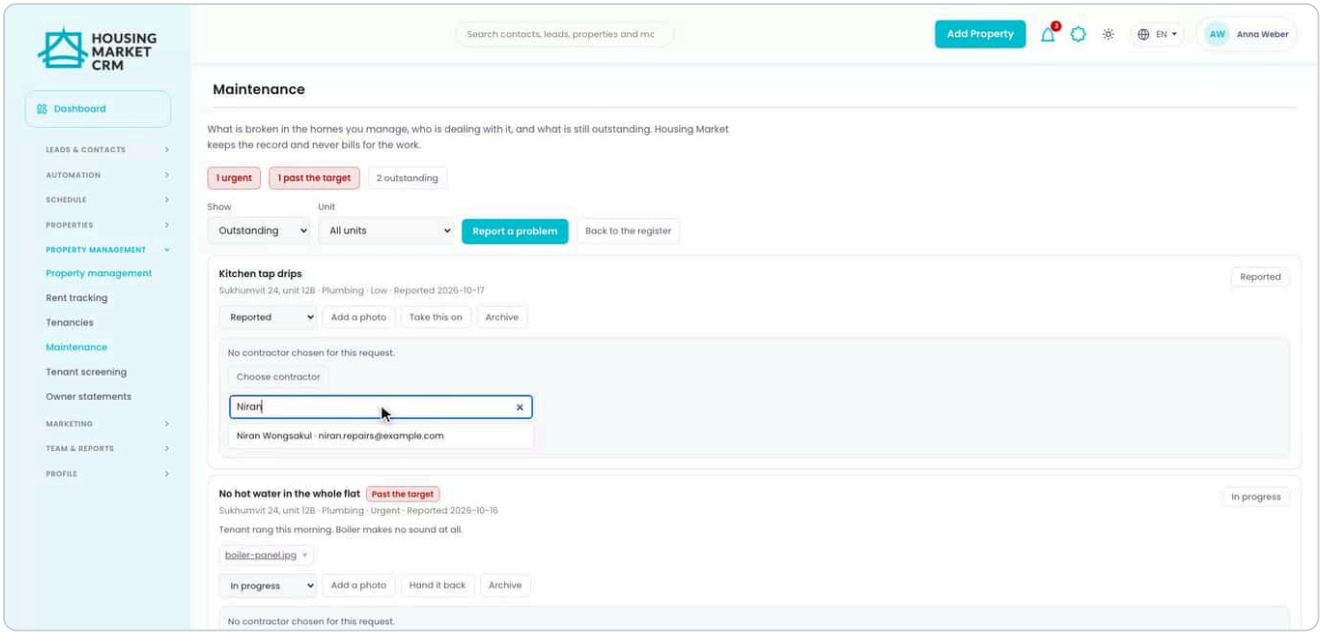


Figure 121.7 · Screen recorded 19 October 2026

8 Pick the contractor.

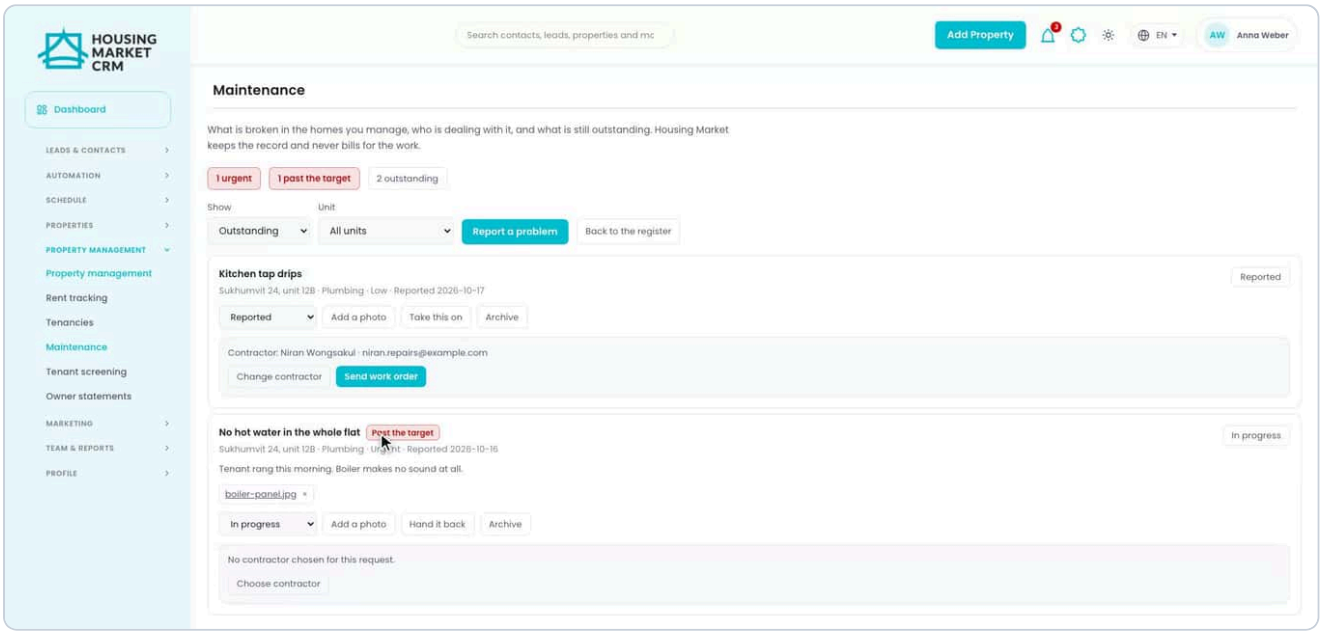


Figure 121.8 · Screen recorded 19 October 2026

9 Click **Send work order**.

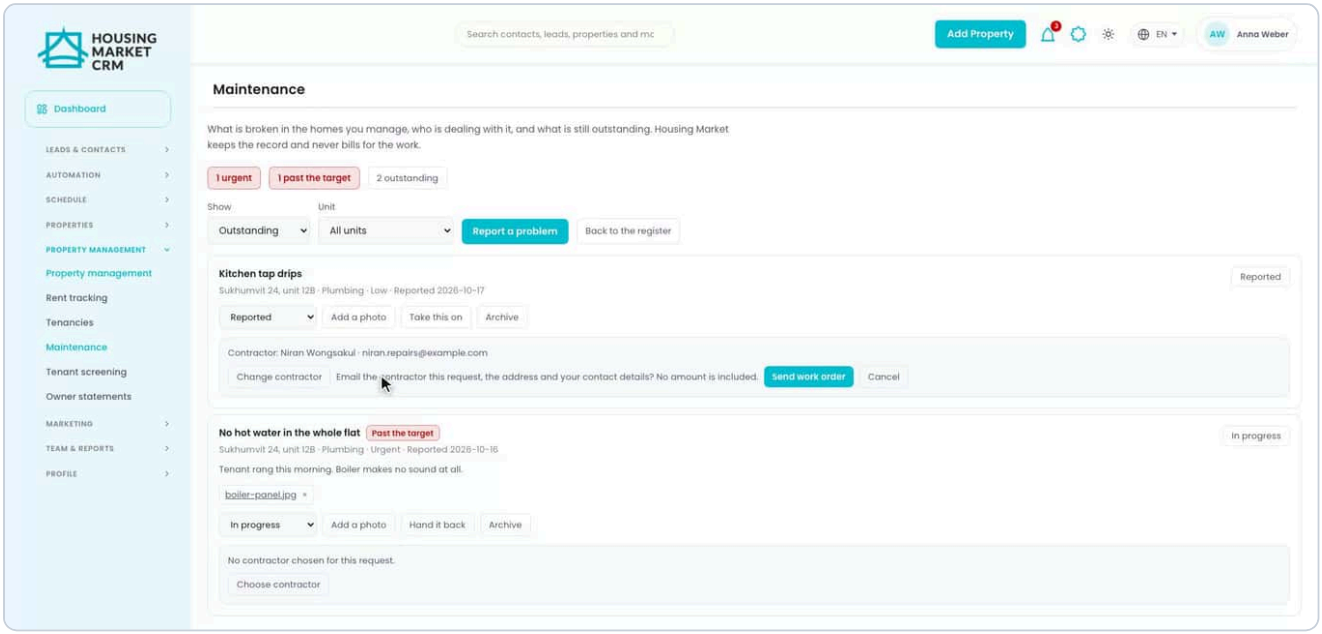


Figure 121.9 · Screen recorded 19 October 2026

10 The request, the address and your details. **No amount**.

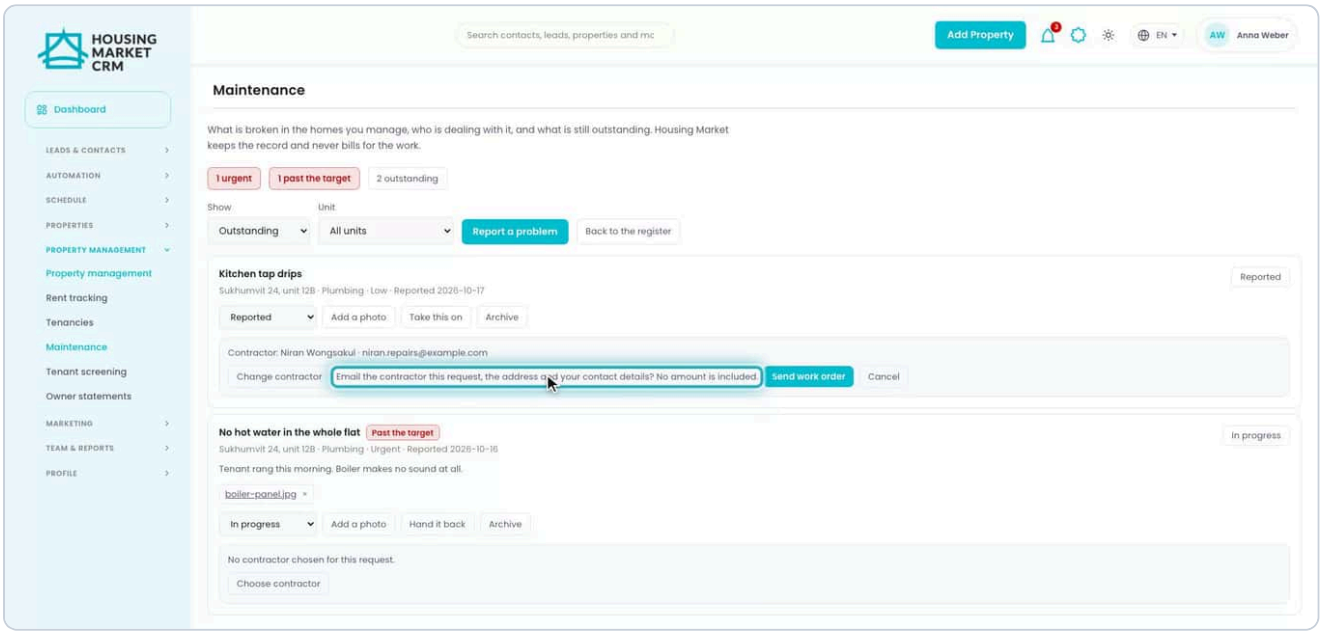


Figure 121.10 · Screen recorded 19 October 2026

11 Click **Send work order** again to confirm.

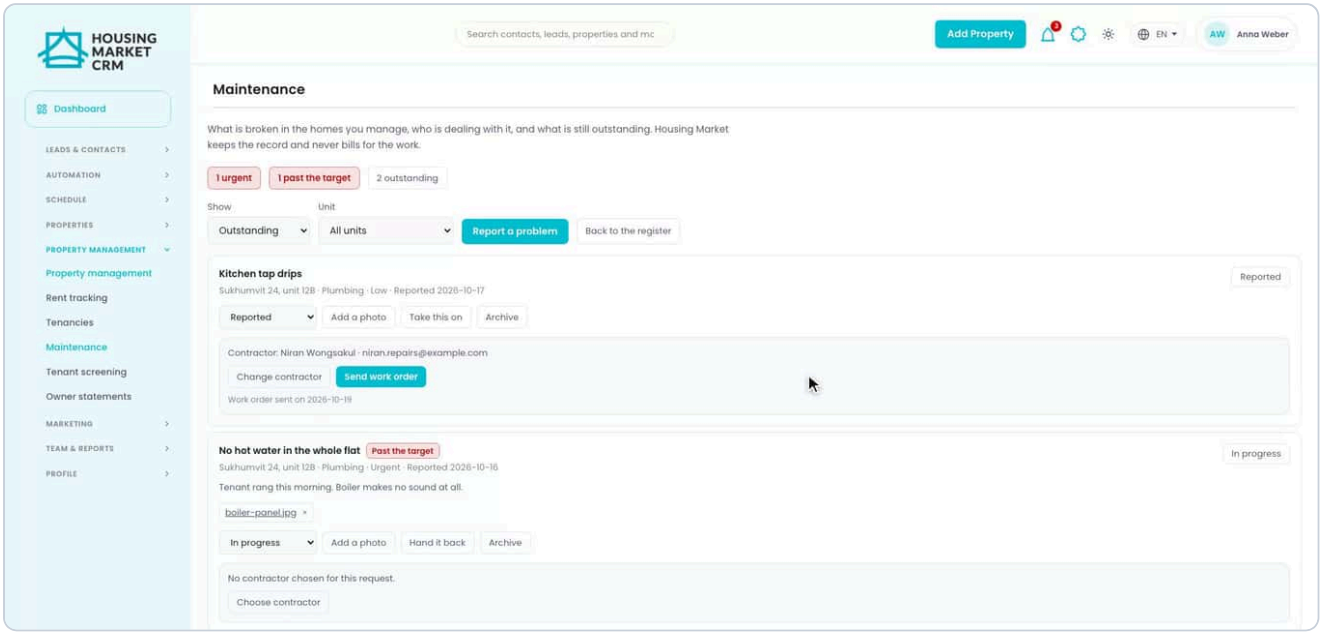


Figure 121.11 · Screen recorded 19 October 2026

12 The request now shows **when the work order went**.

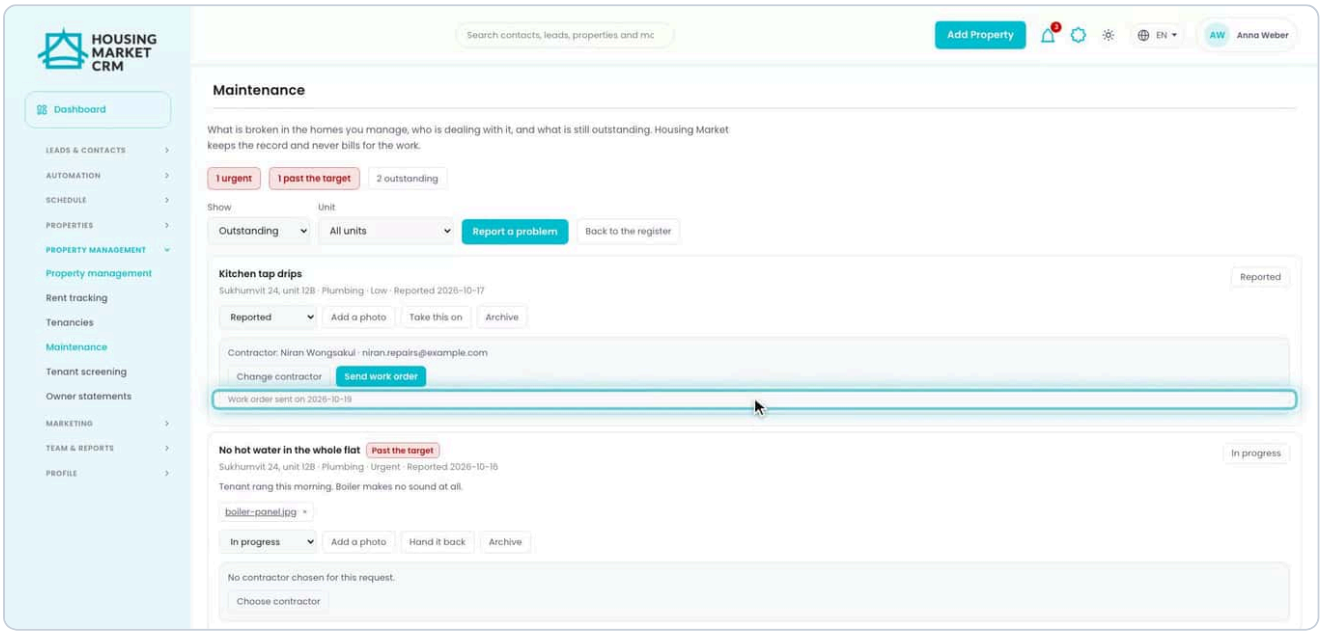


Figure 121.12 · Screen recorded 19 October 2026

13 Nothing is sent **without you** confirming it.

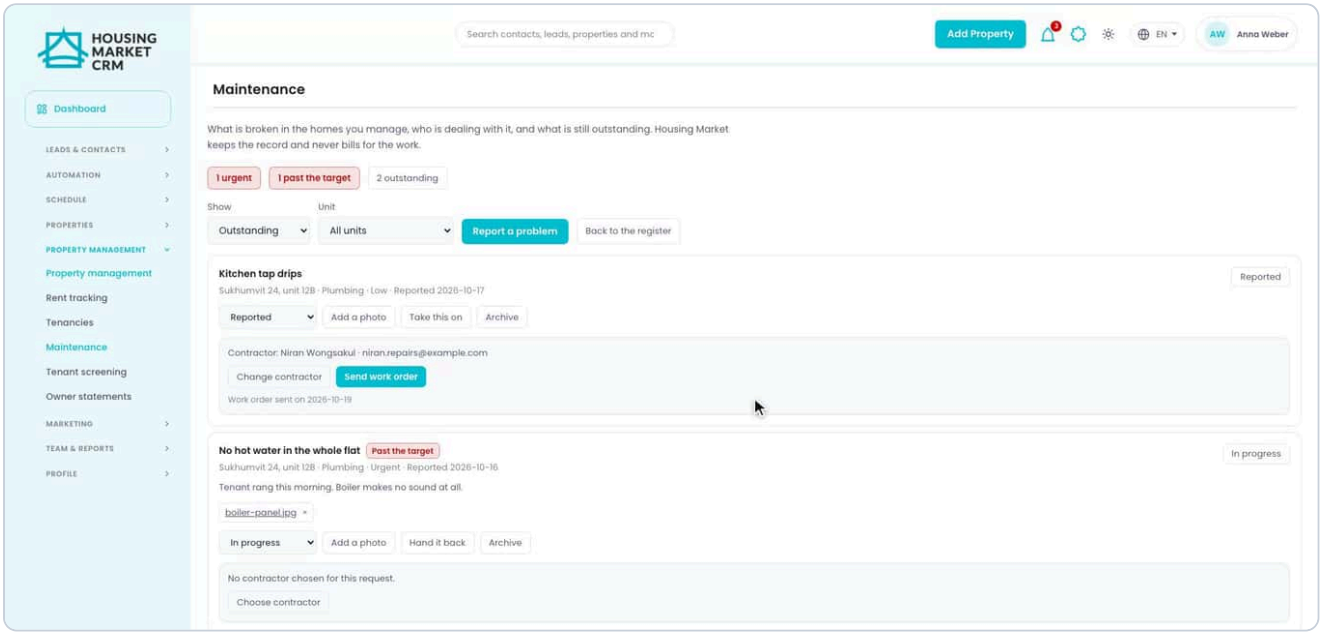


Figure 121.13 · Screen recorded 19 October 2026

RELATED HELP CENTER ARTICLES

How do maintenance requests work?	faq.housingmarketgroup.com/faq/how-do-maintenance-requests-work

122 CHAPTER 122

Export an owner statement

Pro and Business | For agents | Watch the video

OVERVIEW

A month's account of what an owner's homes were due and what your agency recorded as received, divided by each owner's recorded share. It reports and never pays: Housing Market takes no cut, deducts nothing and pays nobody.

Choose Owner statements under Property management. Pick a month and an owner and the CRM sets out what that owner's homes were due in that month, and what your agency has recorded as received.

A statement reports, it never pays

Housing Market sets out what your agency recorded and does nothing else with it. There is no payout, no remittance, no bank detail, no balance carried forward and no settlement. There is also no management fee, no commission, no deduction and no expense line — our prices are fixed and billed to your subscription, so nothing is ever taken out of an owner's rent. A statement in this product is a report, and the transfer to the owner happens wherever it happens today.

What it is built from

One card per home and per tenancy in force, so a home that changed tenant mid-month gets two cards rather than one blended figure. Each card shows the rent agreed in the tenancy that was in force that month — not the rent agreed since — how many dates fell due and for how much, how many of them are recorded as received, anything waived, and the deposit.

There is a separate line for rent received for earlier months: a charge that fell due in March and was recorded as received in April belongs to April's statement as arrears, and to March's as still outstanding. Keeping the two apart is what stops a late payment appearing to be a second one.

A home with nobody in it is still on the statement, marked Empty for the month, because an owner asking what their portfolio did needs the empty ones named rather than missing.

Ownership is a period, so a sale lands correctly

An owner's period on a home is what decides the statement, not who owns it now. A home sold in June still puts May on the seller's statement, and the card says "Owned until" or "Owned from" where a month was only partly theirs. Where one owner's period ends on the day the next one's begins, that is read as a handover rather than as two people owning it at once.

Shares, and the one case that is left undivided

Where an owner's share is recorded, their figures are that share of the home's — forty per cent stays forty per cent and is never rounded up to the whole. Where nobody else held the home at the same time, the whole amount is theirs and the card says so.

Where a home is co-owned and no share is recorded, the CRM divides nothing. The card shows the home's full figures, apportioned to nobody, the home is counted in a warning at the top, and the amount is held out of the totals in its own line rather than folded into them. An equal split would be an invented number that reads exactly like a checked one, and half of a month's rent is not a rounding error.

Totals are per currency, side by side. Nothing is converted and there is no combined grand total, because a single figure across two currencies would be a rate somebody has to have chosen.

Recording one

The month you are looking at is worked out each time you ask and is not stored. Record this statement keeps a copy of exactly those figures so that what you sent an owner stays readable later; the money on a recorded statement is frozen, while names are read fresh each time, so correcting a contact's spelling does not leave the old spelling on old statements.

If a statement already exists for that owner and month, the button becomes Run this month again. The old one is archived rather than removed and the new one records which it replaces.

What is not here

- No PDF, no spreadsheet, no print view and no email. Recording a statement keeps it inside the CRM; sending it to the owner is still something you do yourself.
- No owner login. There is no owner portal, and an owner cannot sign in to read this.
- No batch run. One owner and one month at a time.
- No maintenance costs. Repairs are recorded on the maintenance screen and never appear on a statement, because no cost is recorded there either.

Recorded shares are set on the unit's ownership rather than on the statement. If the warning names homes with no share recorded, that is what it is asking for.

From the Help Center: **What is an owner statement?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

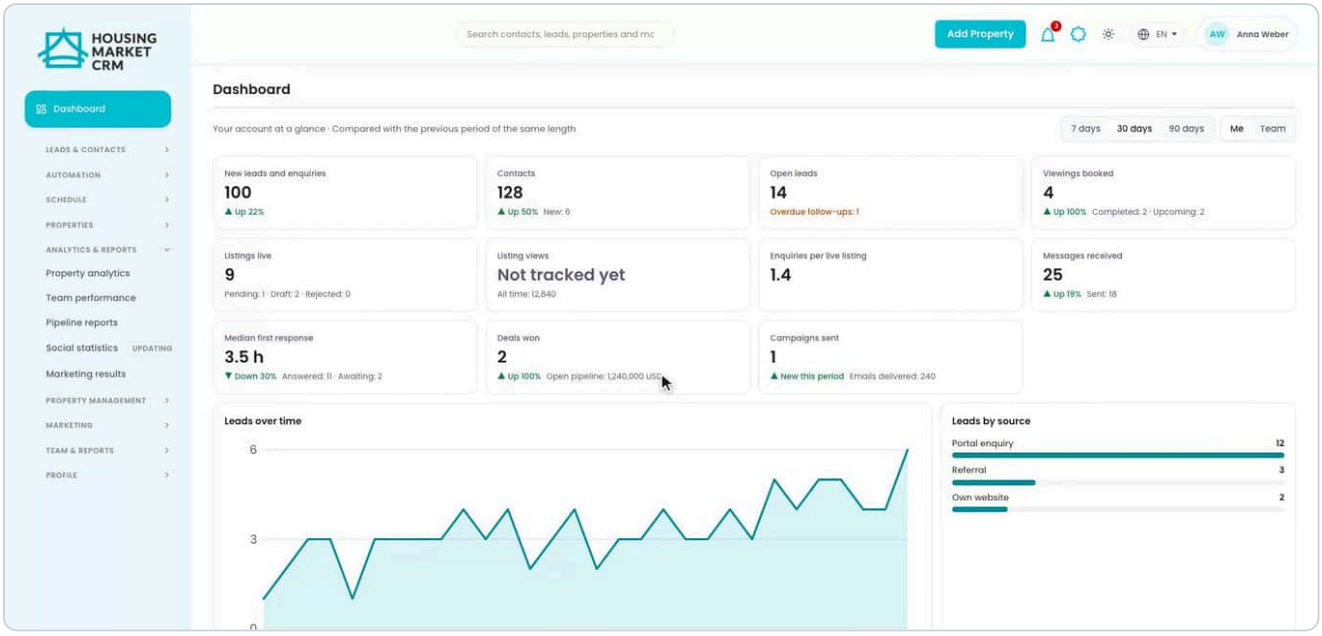


Figure 122.1 · Screen recorded 28 October 2026

2 Open **Property management** in the left menu.

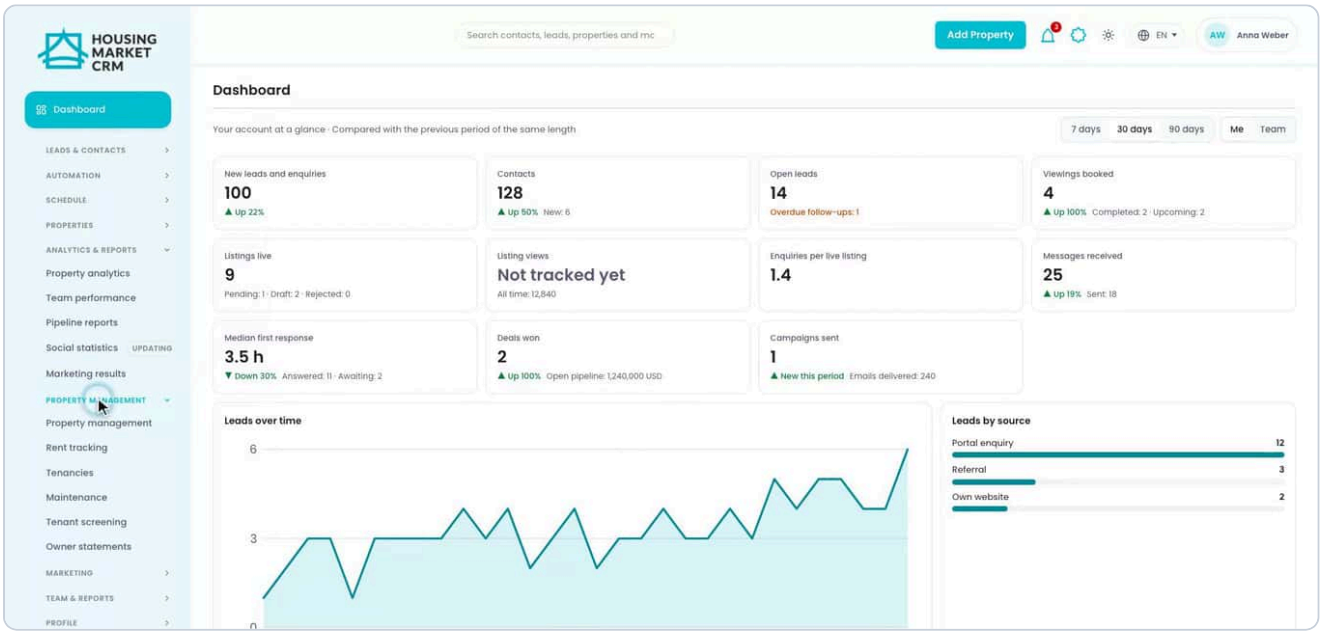


Figure 122.2 · Screen recorded 28 October 2026

3 Click **Owner statements** in the left menu.

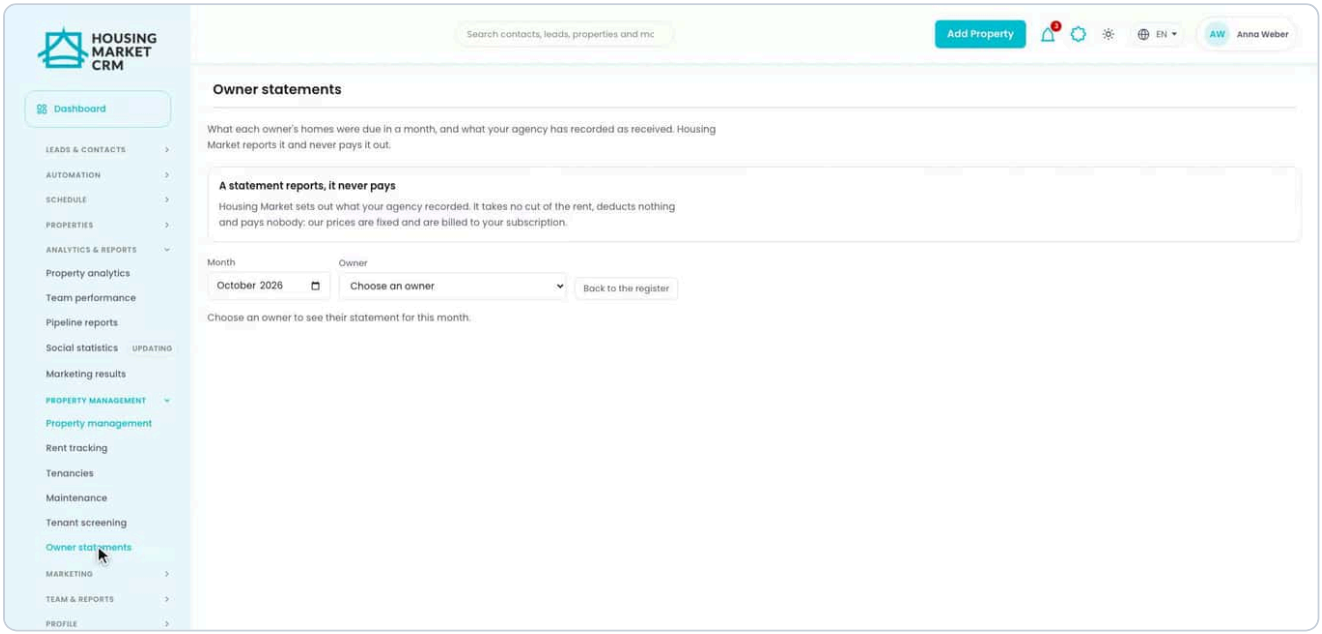


Figure 122.3 · Screen recorded 28 October 2026

4 Choose the **owner** — and the **month** above.

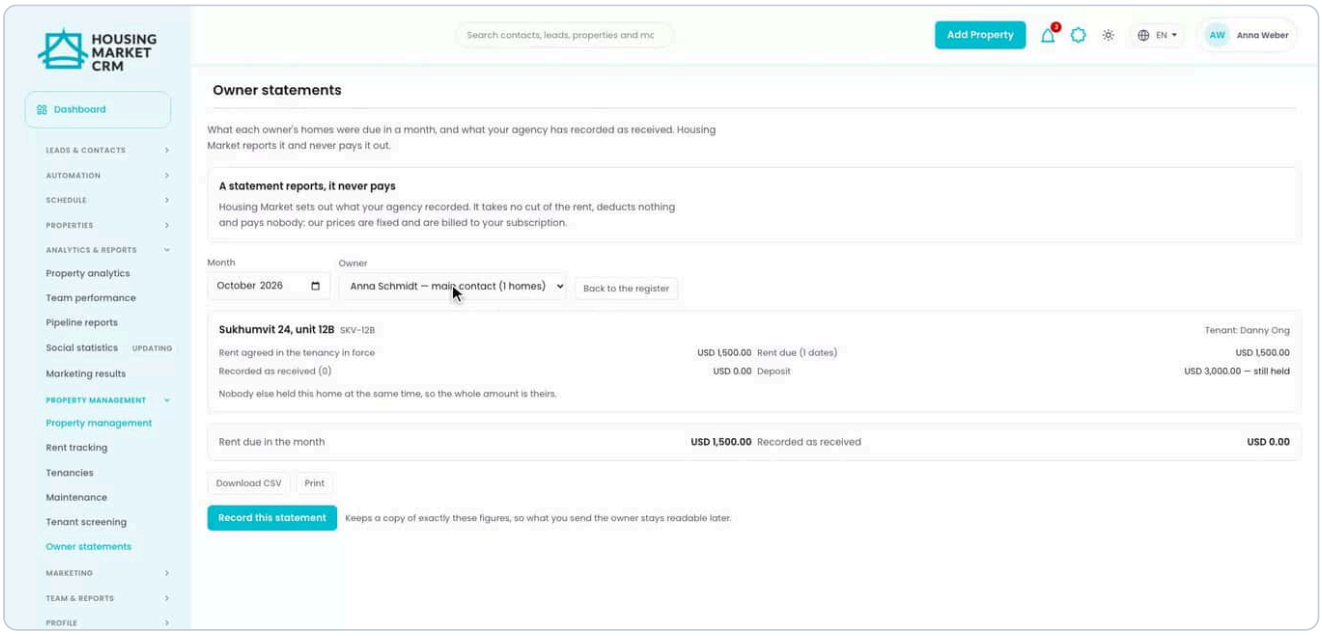


Figure 122.4 · Screen recorded 28 October 2026

5 The statement shows what rent tracking recorded for that month.

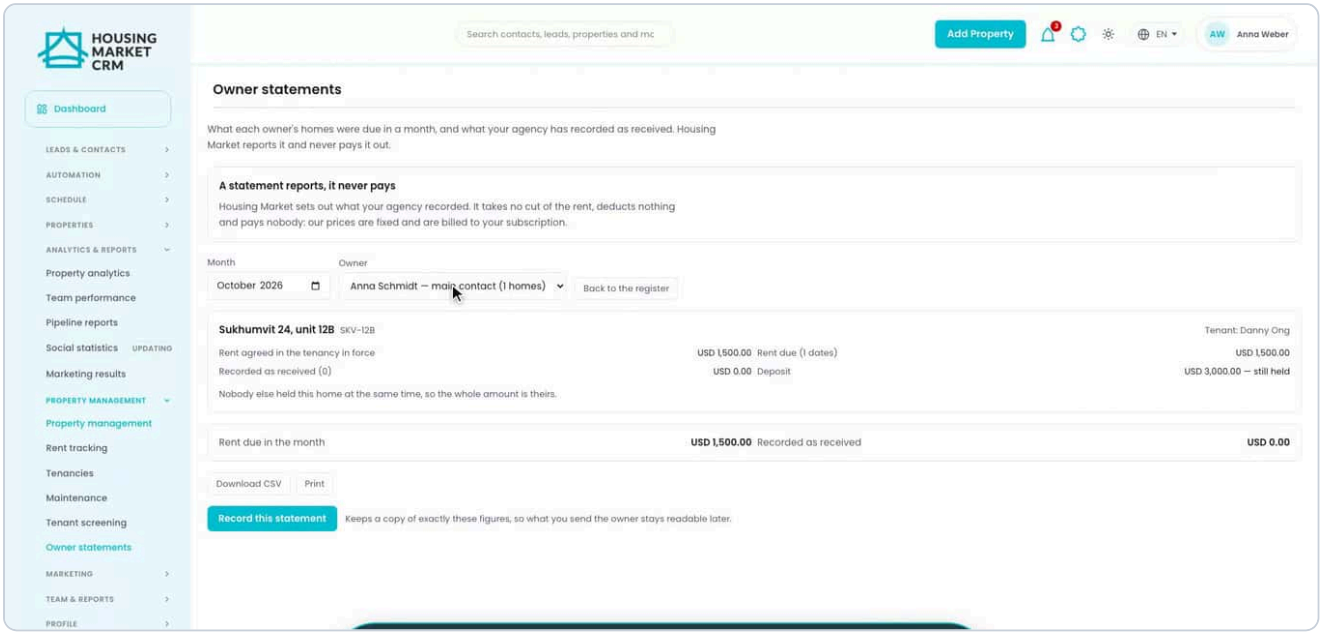


Figure 122.5 · Screen recorded 28 October 2026

6 **Download CSV**: opens in any spreadsheet.

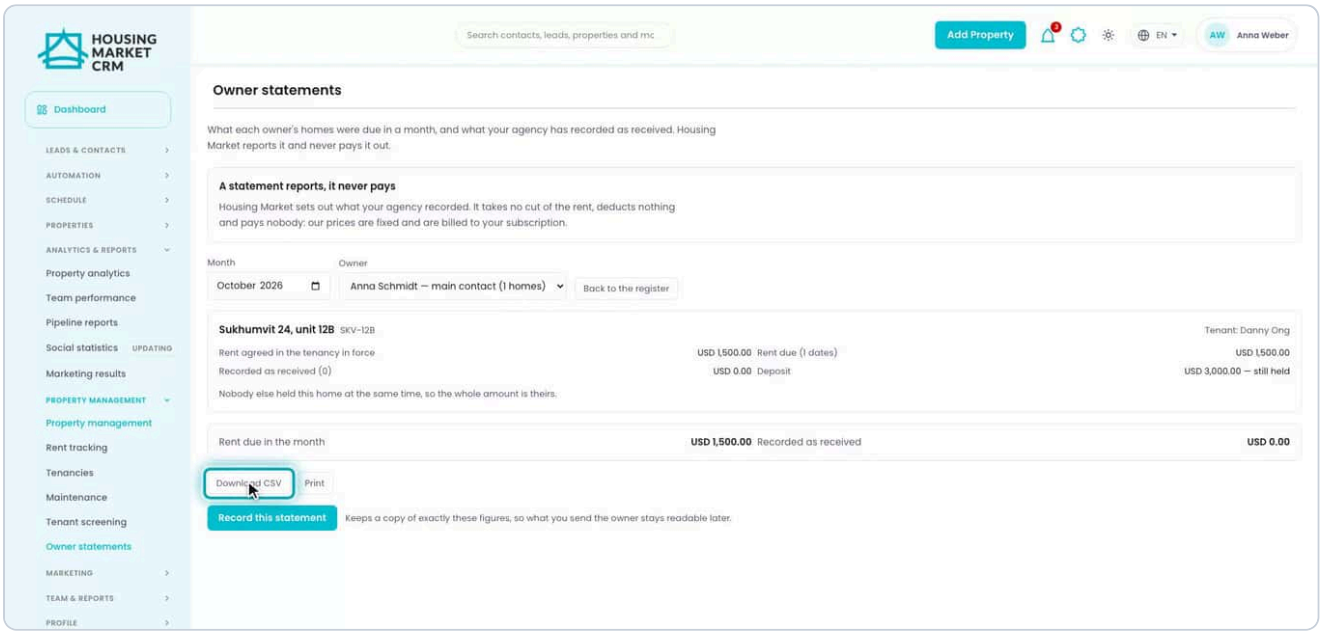


Figure 122.6 · Screen recorded 28 October 2026

7 Print — or choose Save as PDF to email it.

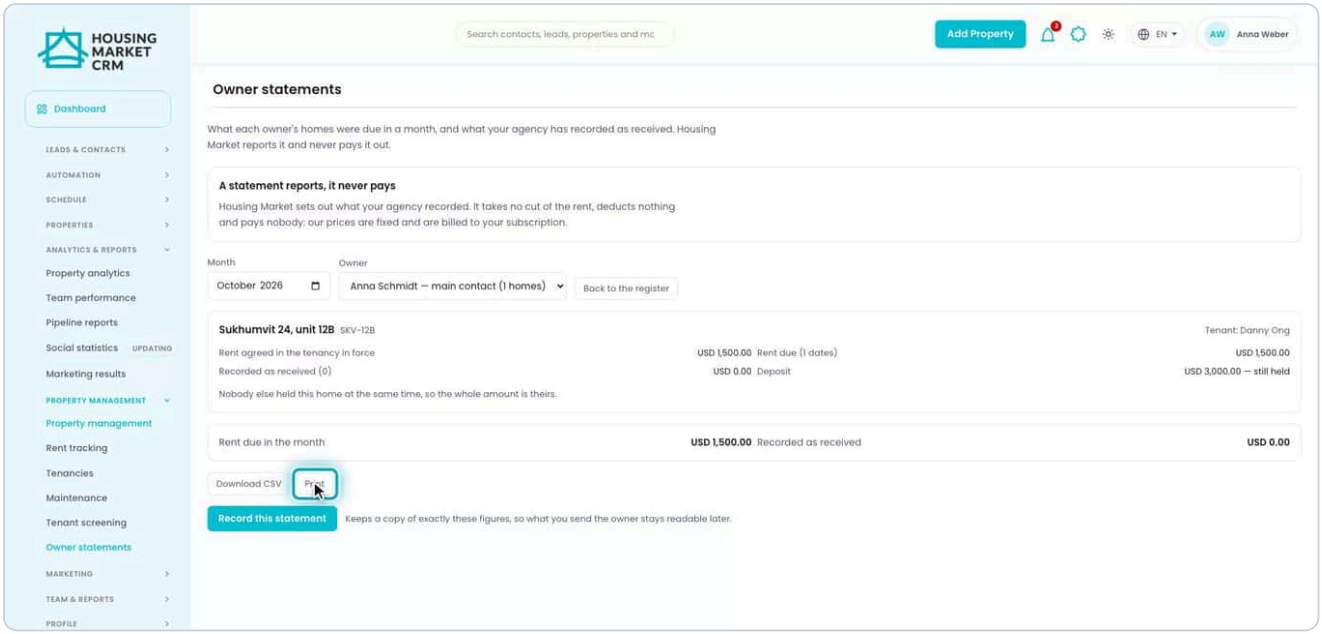


Figure 122.7 · Screen recorded 28 October 2026

8 A statement reports. Nothing here moves money.

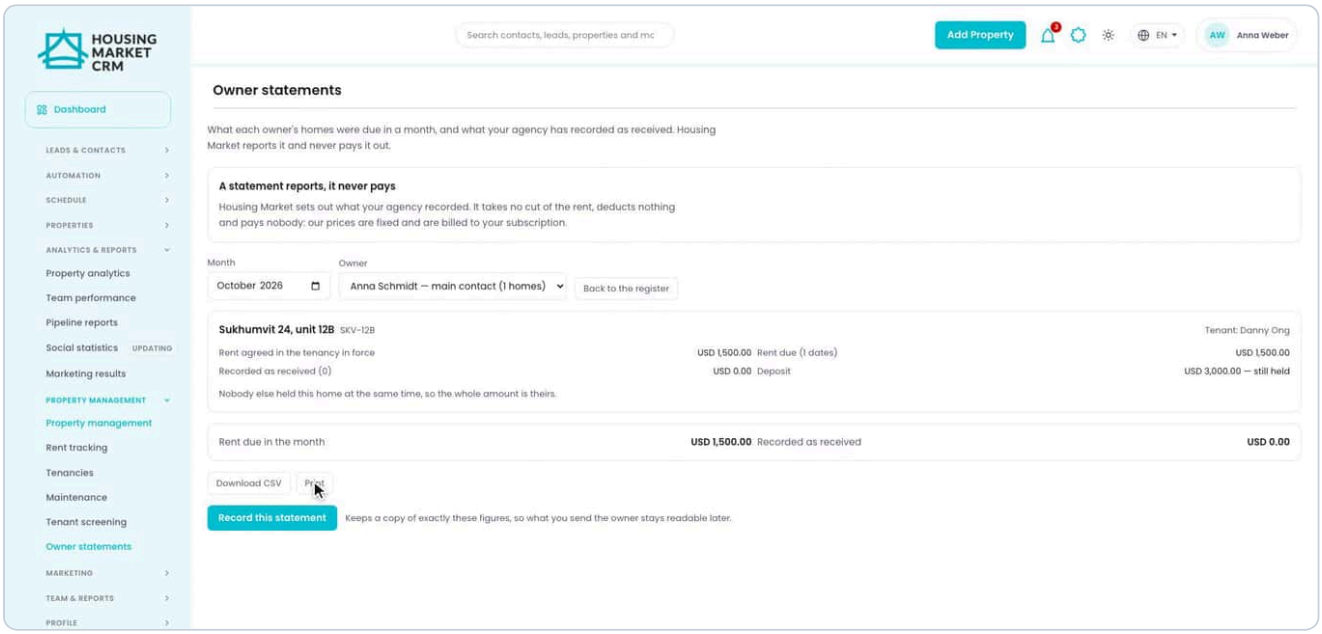


Figure 122.8 · Screen recorded 28 October 2026

RELATED HELP CENTER ARTICLES

Does Housing Market collect rent from my tenants?	faq.housingmarketgroup.com/faq/does-housing-market-collect-rent-from-my-tenants

123 CHAPTER 123

Send a tenant applicant link

Pro and Business | For agents | Watch the video

OVERVIEW

It records the checks your agency carried out itself. Housing Market contacts no credit bureau, no background-check company and no identity-verification service, and produces no score: every outcome on the screen is one you established and typed in.

Choose Tenant screening under Property management. It holds the applications for the homes you manage, the checks your agency carried out, and the decision you recorded.

Read this first: the checks are yours, not ours

Housing Market runs no check on anybody. There is no credit bureau, no background-check company, no identity-verification service, no sanctions or eviction search, and no credit score anywhere in this feature — not switched off, not planned for a later plan, not there. Every outcome on the screen is one your agency established by its own means and then wrote down.

This is said first because "tenant screening" means a bought report in most products that offer it, and a reader who is not told will assume a report arrives. What this screen gives you is one place where the referencing you already do is recorded against the application it belongs to, with the decision beside it and both kept.

Taking an application

- Choose Take an application.
- Choose the Unit and the Applicant. The applicant is one of your own contacts.
- Give the date they want to move in, if you know it.

The application points at your address book rather than making a second copy of the person. Nothing in this feature stores a date of birth, an identity-document number, a bank account, a salary figure or an employer's name — what you concluded about income or employment is one word and whatever note you chose to write.

Recording a check

Record a check holds six kinds — Identity, Employment, Income, Previous landlord, Affordability and Other — and each takes one of four outcomes: Satisfied, Not satisfied, Still open, or No answer received.

No answer received is a real outcome rather than a polite way of saying no. A previous landlord who never replies has told you nothing bad, and recording that as a failure would turn somebody else's silence into a mark against the applicant.

One check is kept per kind. Recording the same kind again replaces the outcome and records that it was you who made the current claim, and the earlier outcome stays in the audit trail. There is no score, no overall pass or fail, no ranking of applicants and no recommendation: the decision is entirely yours.

The decision, and correcting it

Record the decision takes Approved, Declined or Withdrawn by the applicant, with a reason. Once a decision exists, the check form closes and the heading becomes Correct the decision: recording a different one puts a correction beside the first and removes nothing. There is no way back to undecided.

The audit trail records the unit, the decision and who made it. It deliberately does not record the reason you typed or the applicant's name.

What is not here

- No form, link or email for the applicant. There is no applicant-facing anything: your office types what it found.
- No document upload on this screen. Supporting documents are listed by name, and they are attached through the CRM's own files rather than from here.
- No fee. Screening adds no charge of its own — it is part of the property-management module.
- No filter by unit or by status yet. The screen toggles between active and archived applications.
- No button that turns an approved application into a tenancy. Record the tenancy on the Tenancies screen.

Nothing is deleted. Archiving an application keeps every check, the decision, and who made it.

From the Help Center: **How does tenant screening work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

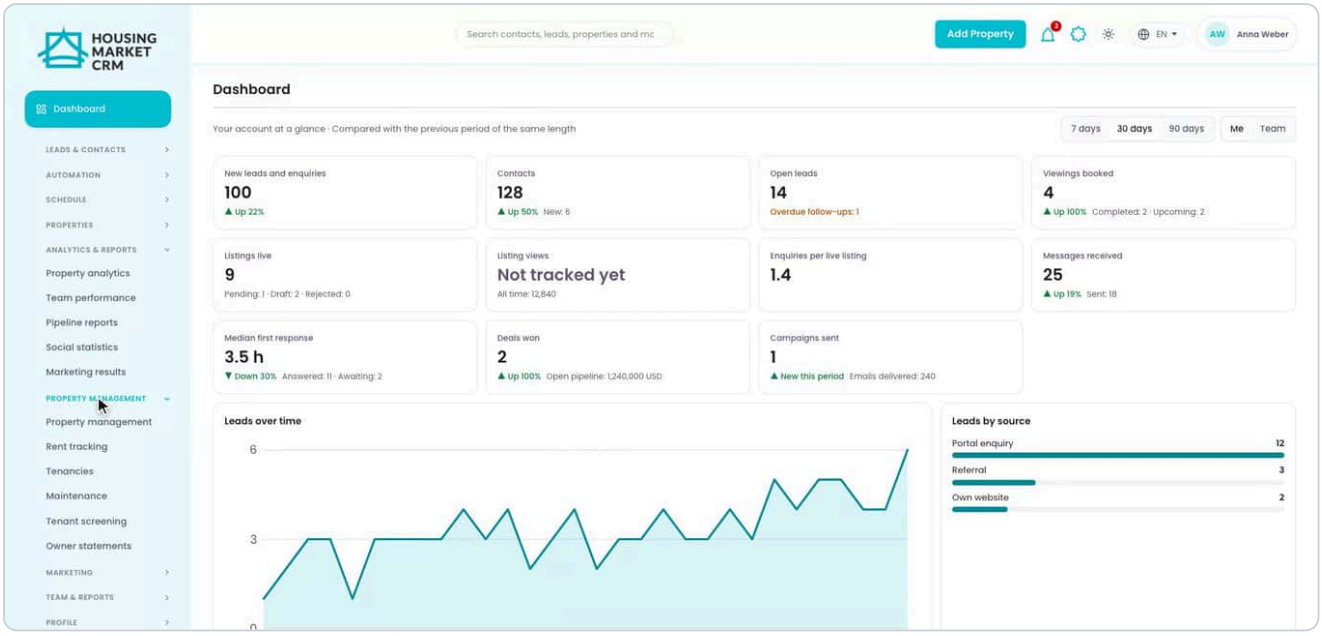


Figure 123.1 · Screen recorded 1 November 2026

2 Click **Tenant screening** in the left menu.

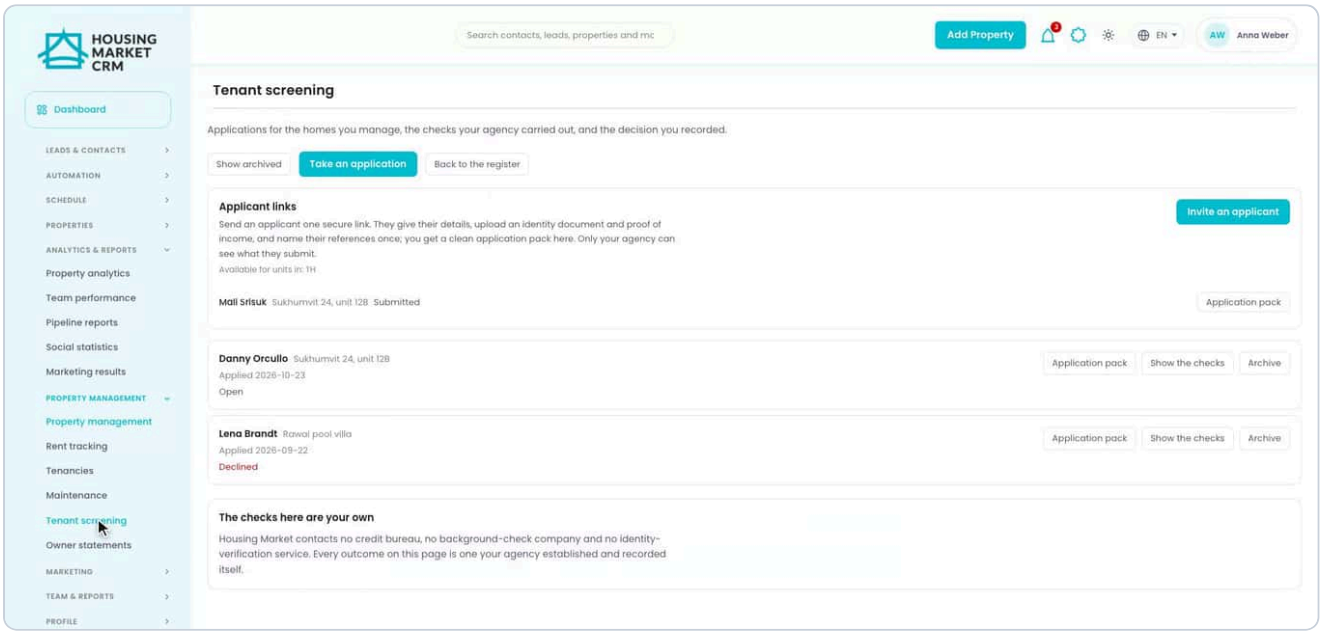


Figure 123.2 · Screen recorded 1 November 2026

3 Click **Invite an applicant**.

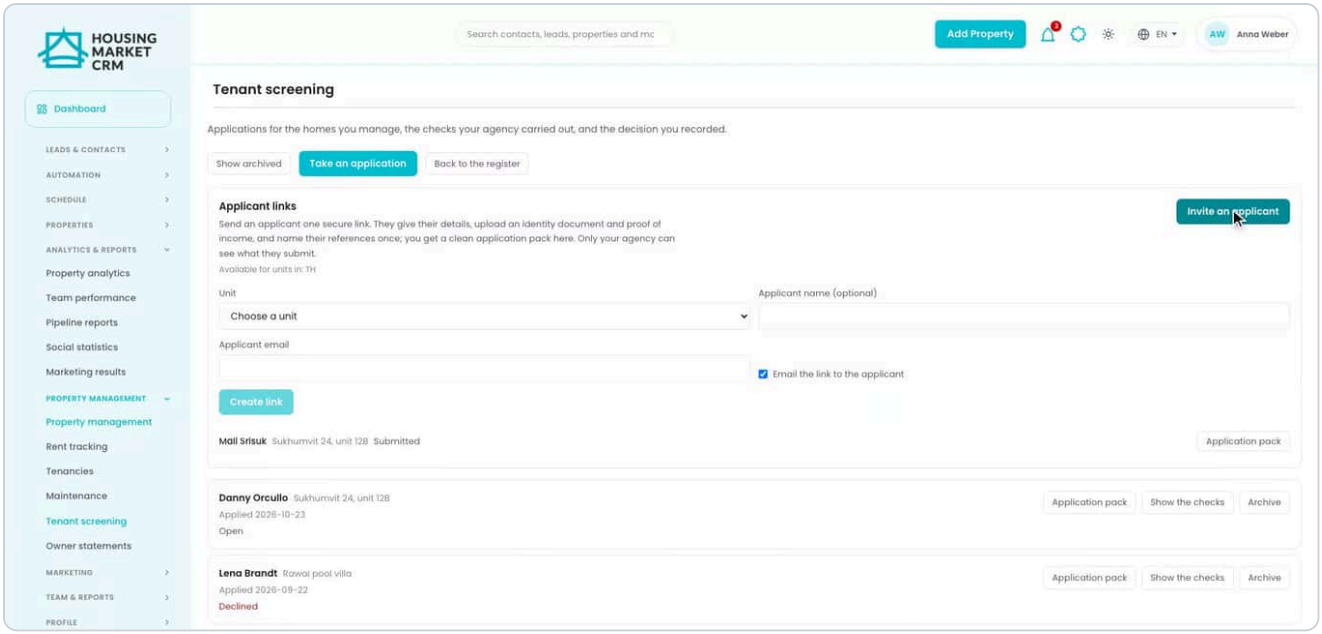


Figure 123.3 · Screen recorded 1 November 2026

4 Choose the **unit** and enter their **email**.

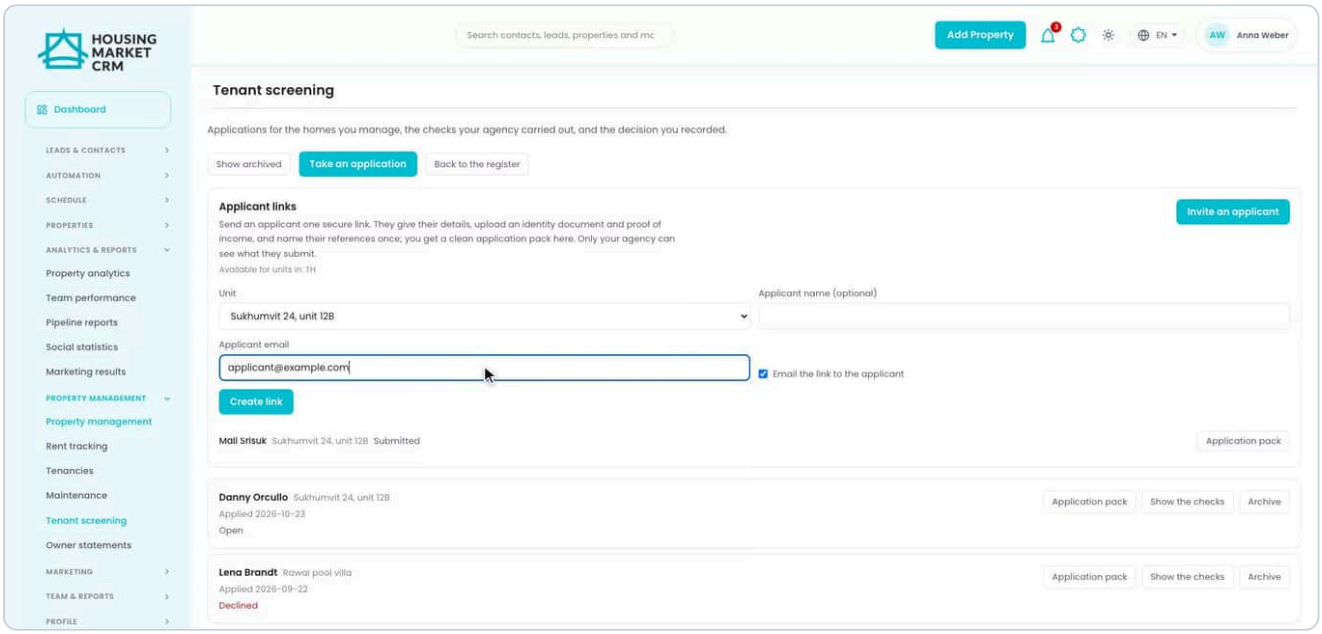


Figure 123.4 · Screen recorded 1 November 2026

5 Create link. It is shown once.

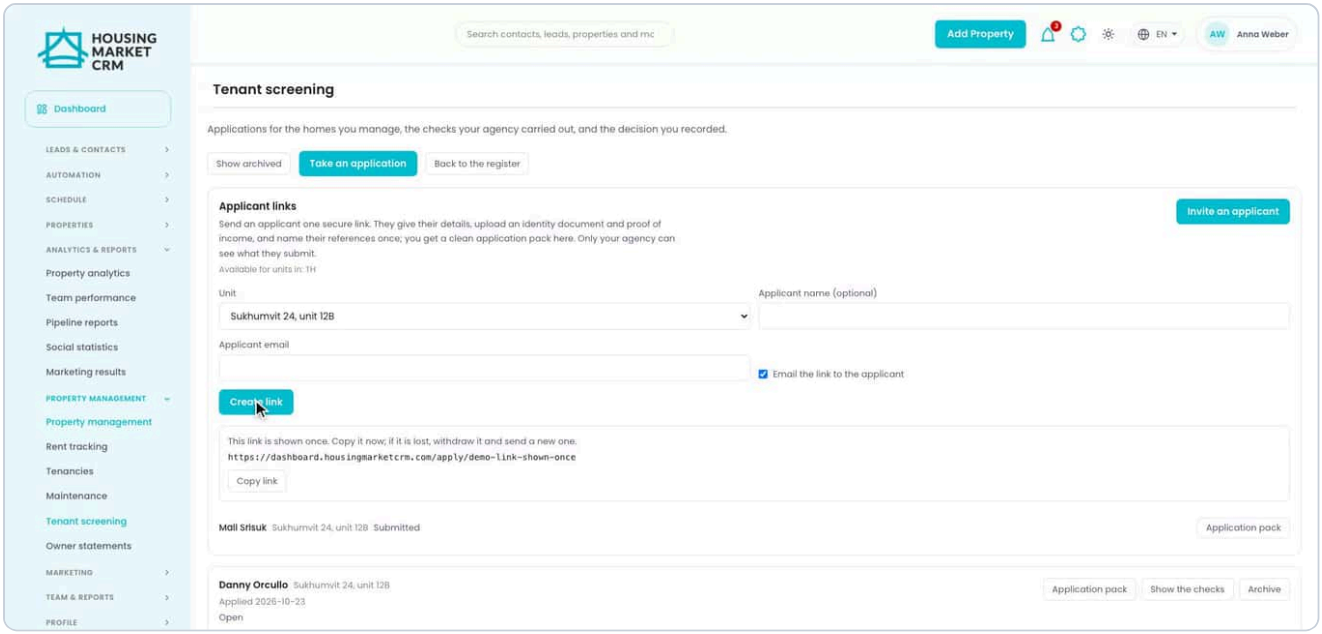


Figure 123.5 · Screen recorded 1 November 2026

6 Their details, an identity document, proof of income and references.

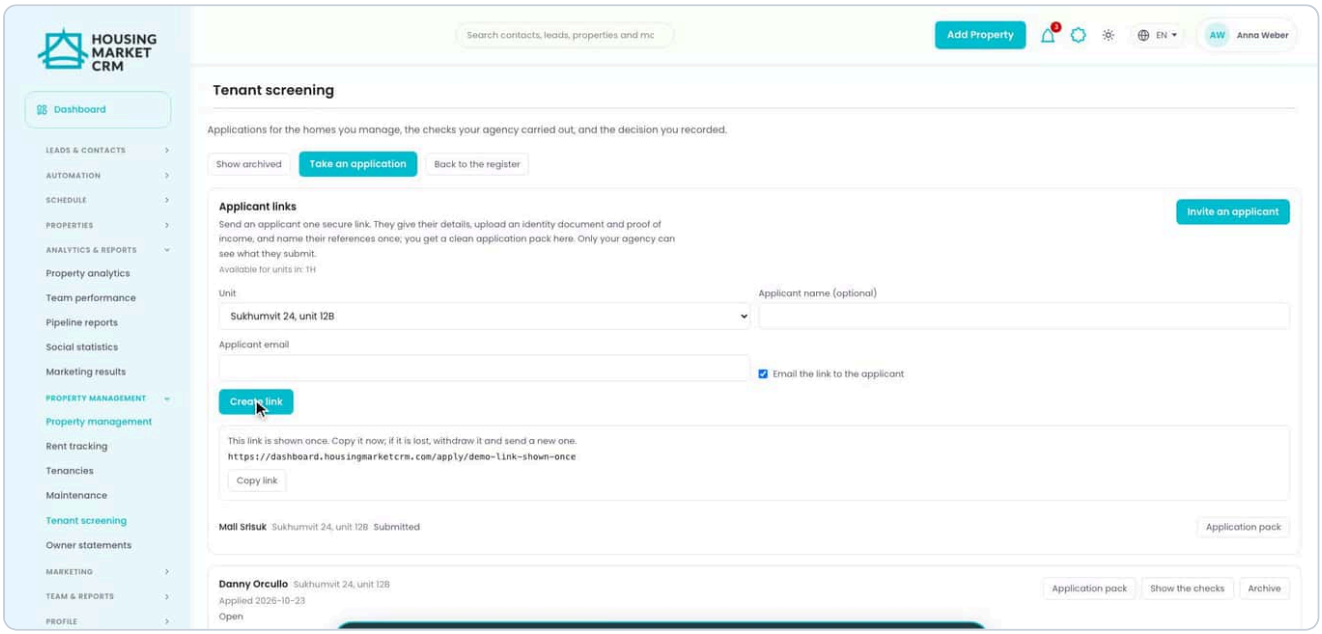


Figure 123.6 · Screen recorded 1 November 2026

7 Open the **Application pack**.

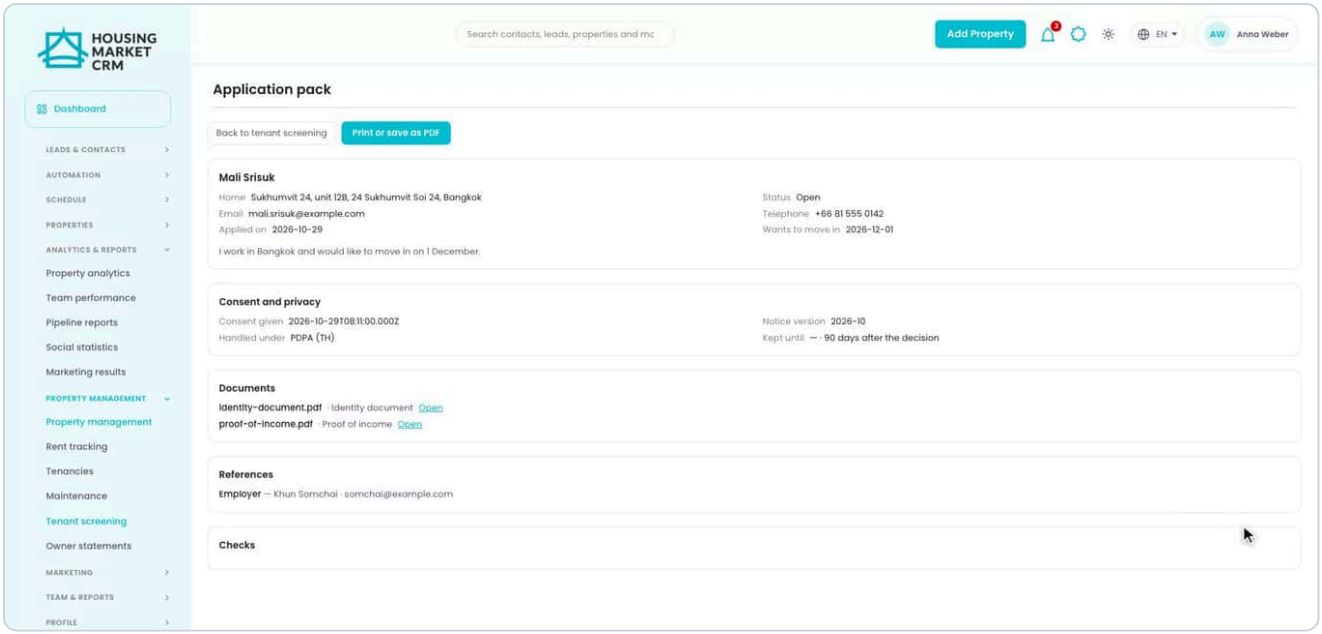


Figure 123.7 · Screen recorded 1 November 2026

8 Print it, or **save it as a PDF**.

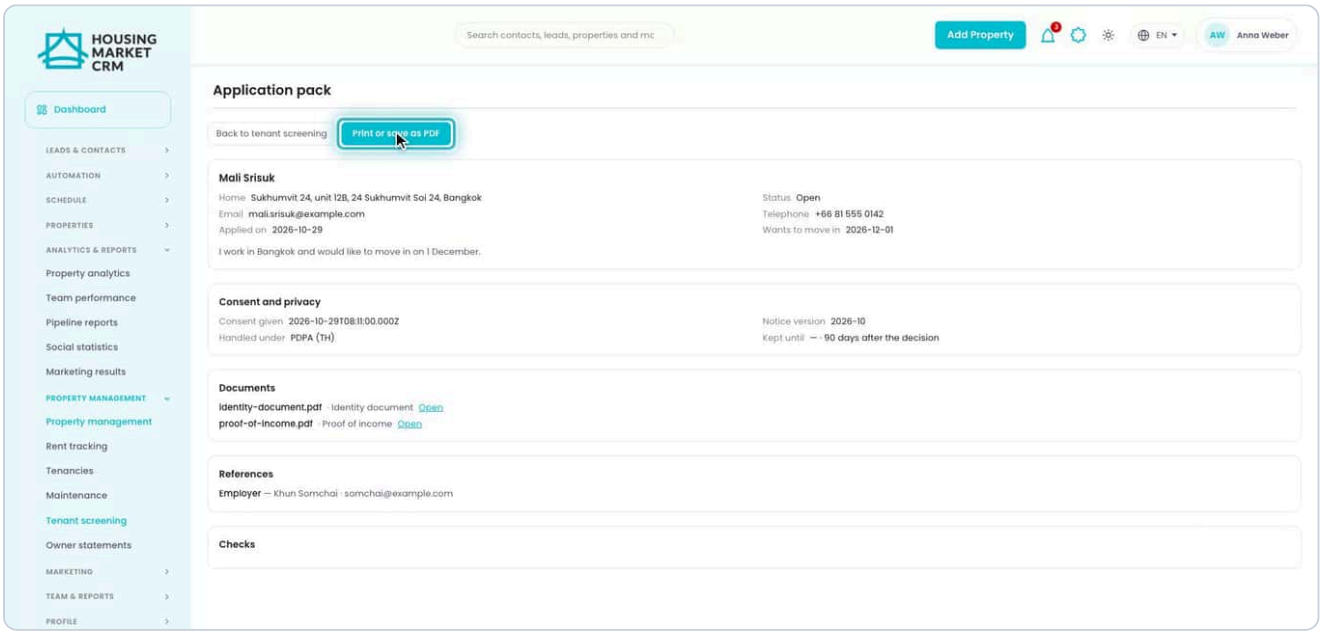


Figure 123.8 · Screen recorded 1 November 2026

9 Only **your agency** sees it. The decision is yours.

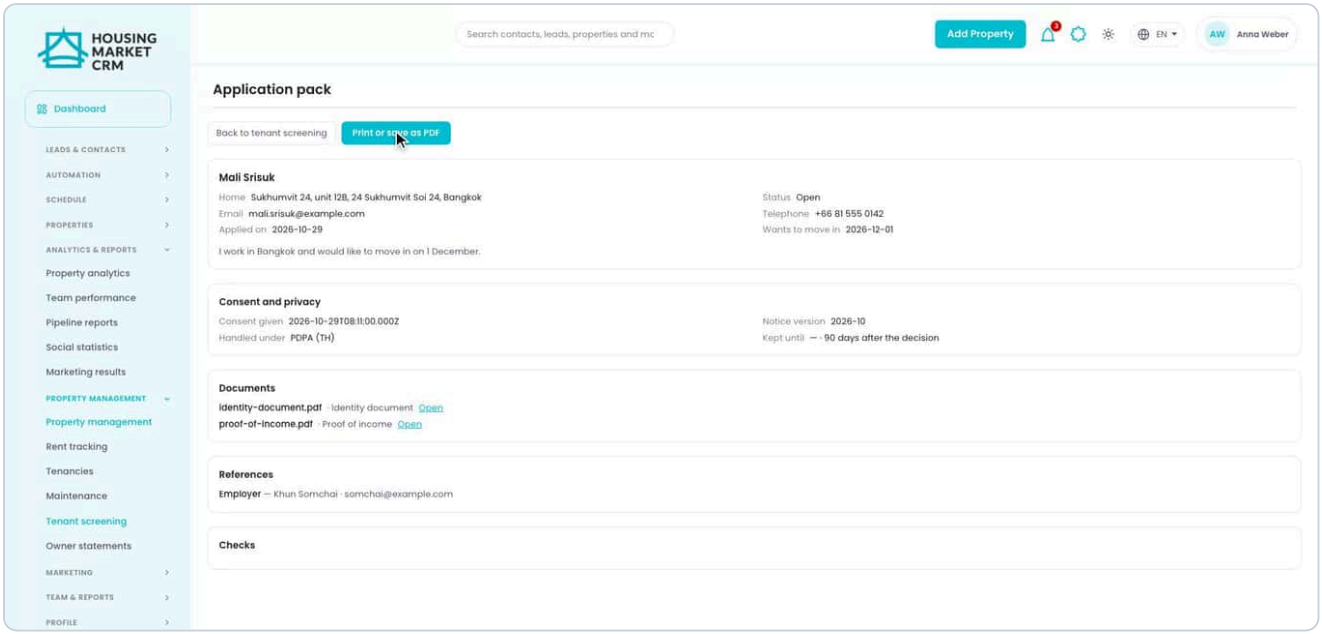


Figure 123.9 · Screen recorded 1 November 2026

RELATED HELP CENTER ARTICLES

What is Property management in the CRM?	faq.housingmarketgroup.com/faq/what-is-property-management-in-the-crm

124 CHAPTER 124

Housing Market Manager: run your rentals in one place

Pro and Business | For letting agencies and landlords | Watch the video

OVERVIEW

A register of the homes your agency looks after for other people: each unit, who owns it, and for how long. It is part of Pro and Business, and it is separate from the properties you are selling or letting.

Choose Property management in the menu. It holds the units your agency looks after on behalf of owners who are somebody else — "Units, owners and tenants for the properties your agency manages", as the page puts it.

Why it is not just another property

A property elsewhere in the CRM is something you are selling or letting, and it is finished when the deal is. A managed unit outlives every tenancy in it, changes hands between owners without becoming a different home, and exists whether or not it is advertised anywhere at the moment. That is why it is a register of its own rather than a flag on a listing.

Adding a unit

- Choose Add a unit.
- Give it a Name, and a Reference if your office uses its own codes for units.
- Choose the Owner from your contacts. A unit always has at least one.
- Choose Save.

Search units finds one again, and the counter above the list shows how many of your allowance you have used.

Owners, shares and a sale

Ownership is a period rather than a name on a card, which is what lets the register hold the two things that turn up immediately: a home owned by a couple, three siblings or two investors sixty-forty, and a home that changed hands on a date. When an owner sells, their period is ended on that date instead of being overwritten, so a statement for the months they owned it still addresses the person who owned it then.

Shares may add up to less than the whole — an agency managing a forty per cent share for one investor is a real arrangement — and never to more. Three thirds recorded as 33.33 each are accepted. An owner has to be a contact you can already see.

Archiving

Nothing here is deleted. A unit you have stopped managing is archived: Show archived finds it, Restore brings it back, and its ownership history is left exactly as it was. An archived unit gives its place back, so you never need to destroy a record to make room for a new one.

Plans and how many units

Property management is part of Pro and Business, and is never on the free plan. Pro and Business both include 10 units: it is sold by the units you manage rather than by the people in your office, so the plan you are on does not change the allowance. The counter on the screen and the server's own refusal read the same number, so the screen cannot promise room the account has not got.

If you are full, the CRM says so and says which of the two things is wrong — your plan does not include this, or your plan is right and your account is full. Larger packs are published and cannot be bought online yet; see "How many units can I manage, and what do the unit packs cost?".

The rest of the module

The register is the first of six screens under Property management, and each of the others has an answer of its own: Rent tracking, Tenancies, Maintenance, Tenant screening and Owner statements. All six are part of Pro and Business and none of them is on the free plan.

Rent is tracked here and never collected. See "Does Housing Market collect rent from my tenants?".

From the Help Center: **What is Property management in the CRM?**

STEP BY STEP

1 Open **Housing Market Manager**.

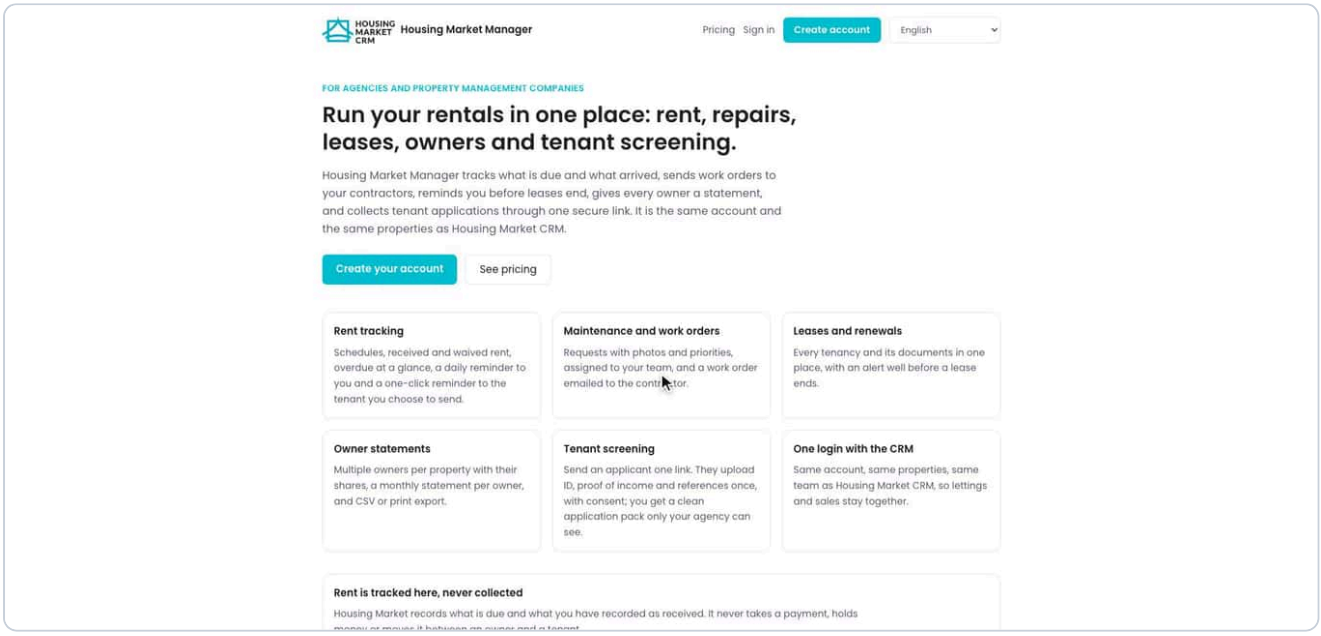


Figure 124.1 · Screen recorded 1 November 2026

2 Rent, repairs, leases, owners and **tenant screening**.

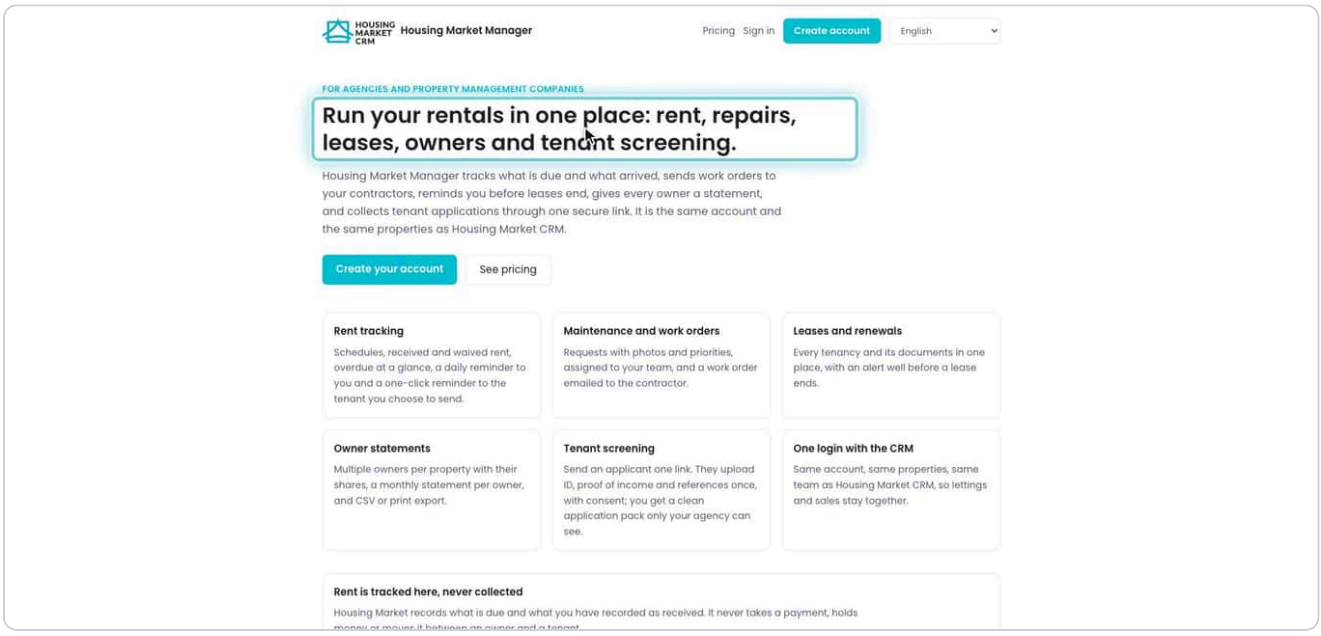


Figure 124.2 · Screen recorded 1 November 2026

3 Housing Market **never collects or holds rent.**

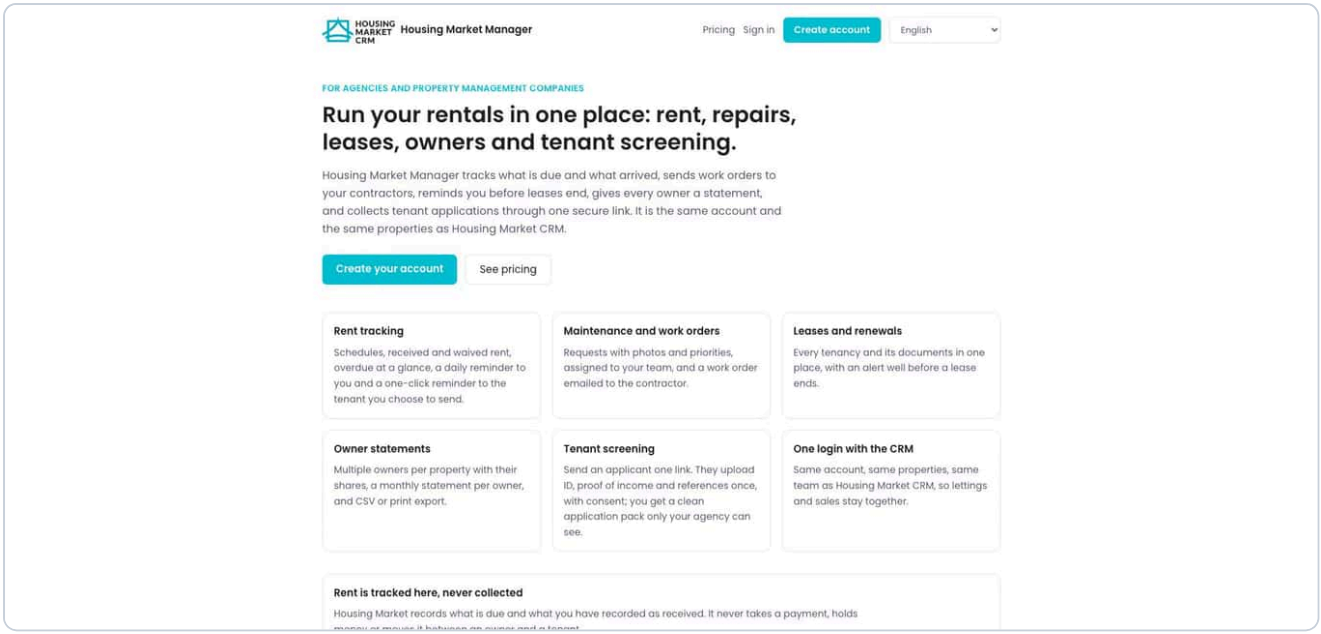


Figure 124.3 · Screen recorded 1 November 2026

4 Click **See pricing.**

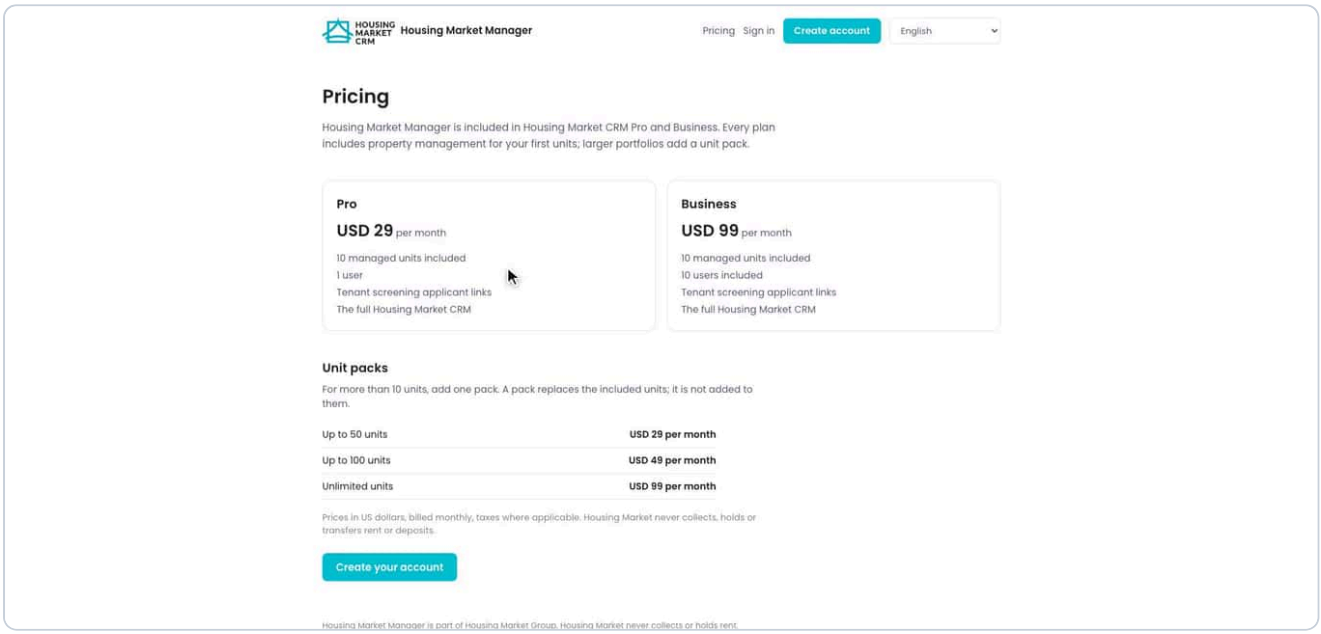


Figure 124.4 · Screen recorded 1 November 2026

5 **Create account** — or sign in with your CRM account.

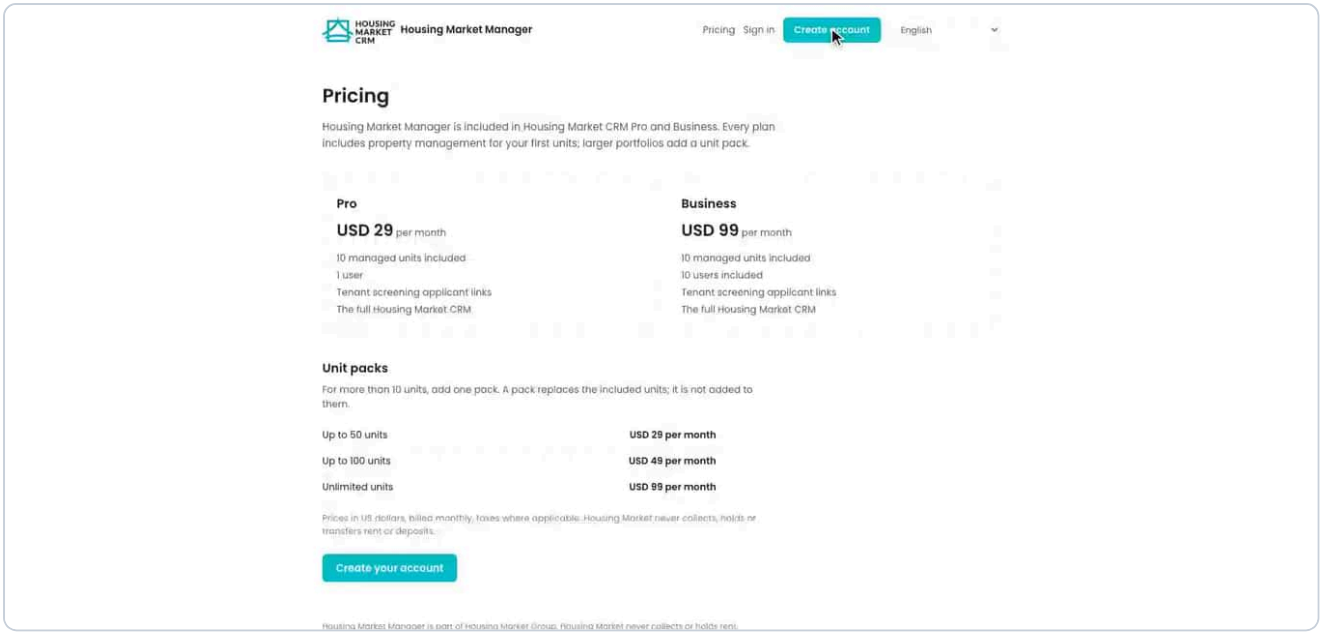


Figure 124.5 · Screen recorded 1 November 2026

RELATED HELP CENTER ARTICLES

Does Housing Market collect rent from my tenants?	faq.housingmarketgroup.com/faq/does-housing-market-collect-rent-from-my-tenants

125 CHAPTER 125

Automatic rent reminders for tenants

Pro and Business | For agents who want their properties on their own website | Watch the video

OVERVIEW

Yes, where your account has them: Remind tenant on a rent charge, and Send work order on a maintenance request. Rent reminders can also go out on their own, but only after your agency switches that on.

Remind tenant emails the tenant from your agency that your records show an amount as not yet received, and to ignore the message if it has been paid. It is sent by a person in your agency when they choose it. A charge can be reminded about at most once every few days, and each reminder is recorded.

Automatic rent reminders

Rent reminders can also be sent for you, but nothing is sent until your agency switches it on. In Rent tracking, the card Automatic reminders to tenants has the choice Send rent reminders to my tenants automatically, the number of days before the due date and the number of days after it (0 for none, up to 30), and the language of the email.

Each reminder goes out in your name, from your agent identity, and replies come to you. A tenant gets at most one email for each reminder on each rent, only while the rent is still shown as not received, and during the day in your agency’s time zone. A tenant with no email address on file is skipped, and a rent you reminded the tenant about by hand a few days ago is left alone. The message says what your records show and asks the tenant to ignore it if they have already paid; it never says they are late. The card shows how many reminders were sent in the last 30 days. Housing Market never collects the rent: a reminder only tells the tenant what your records show.

Send work order emails the contractor the request, its priority, the unit’s address and your agency’s contact details. It carries no amount: Manager never handles payments.

From the Help Center: **Can I remind a tenant about rent or send a work order to a contractor?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

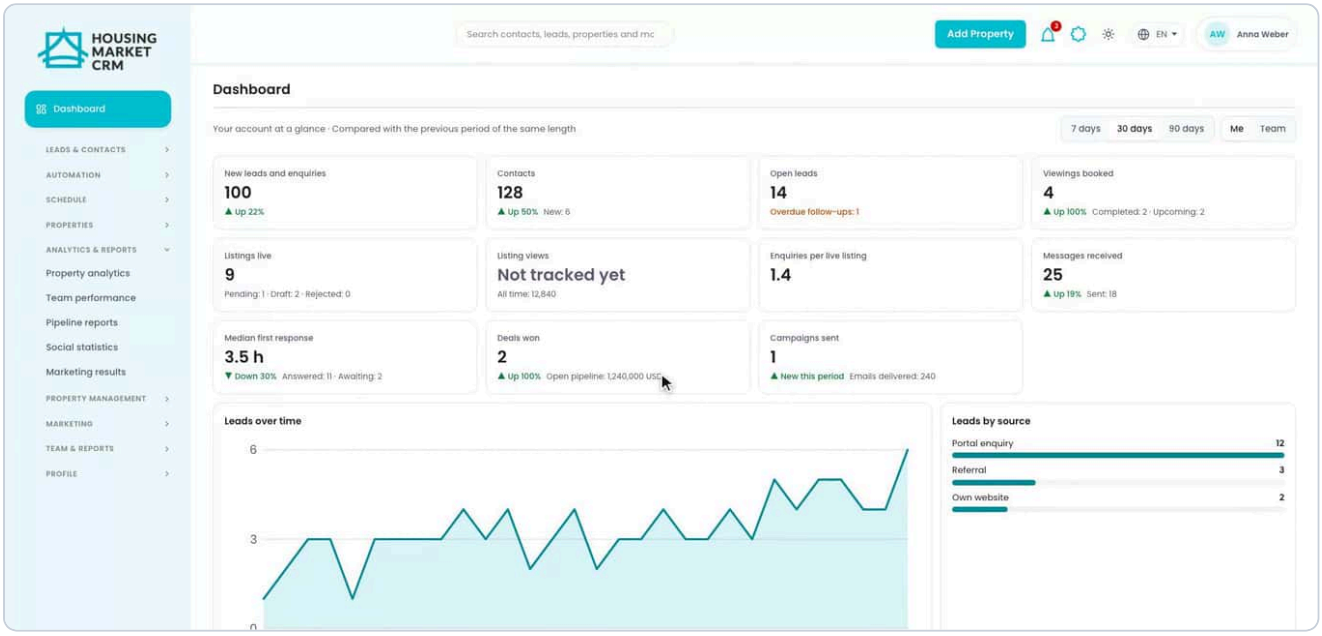


Figure 125.1 · Screen recorded 4 November 2026

2 Open **Property management** in the left menu.

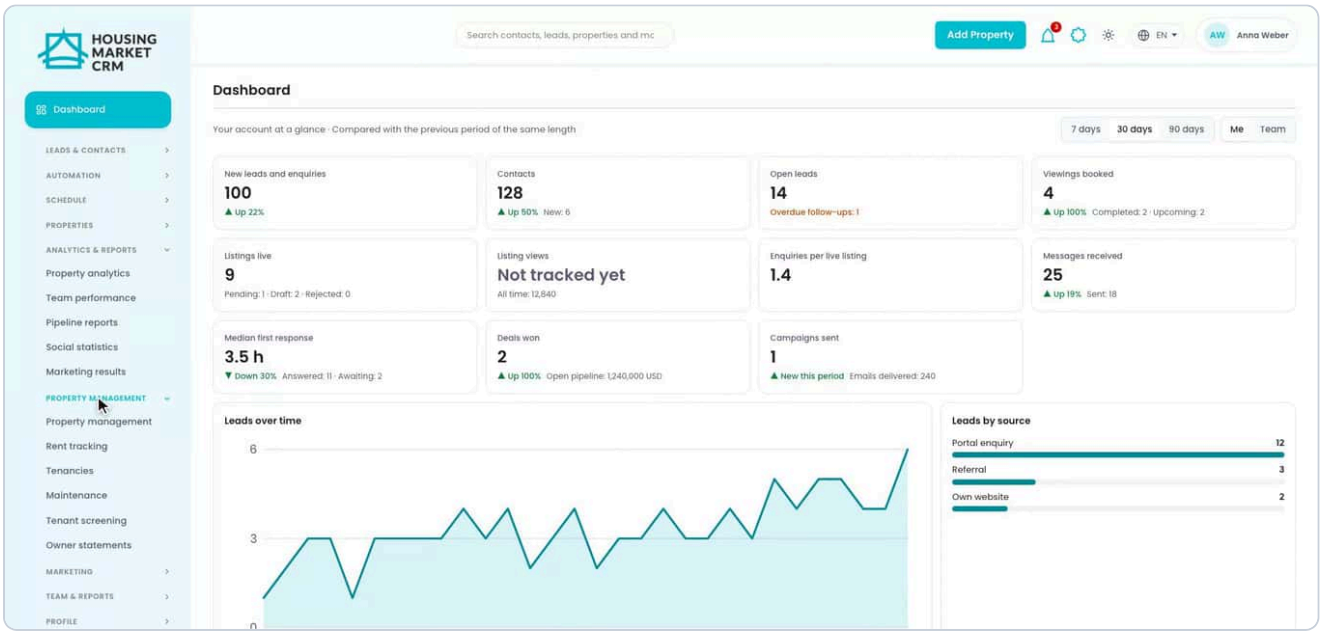


Figure 125.2 · Screen recorded 4 November 2026

3 Click **Rent tracking**.

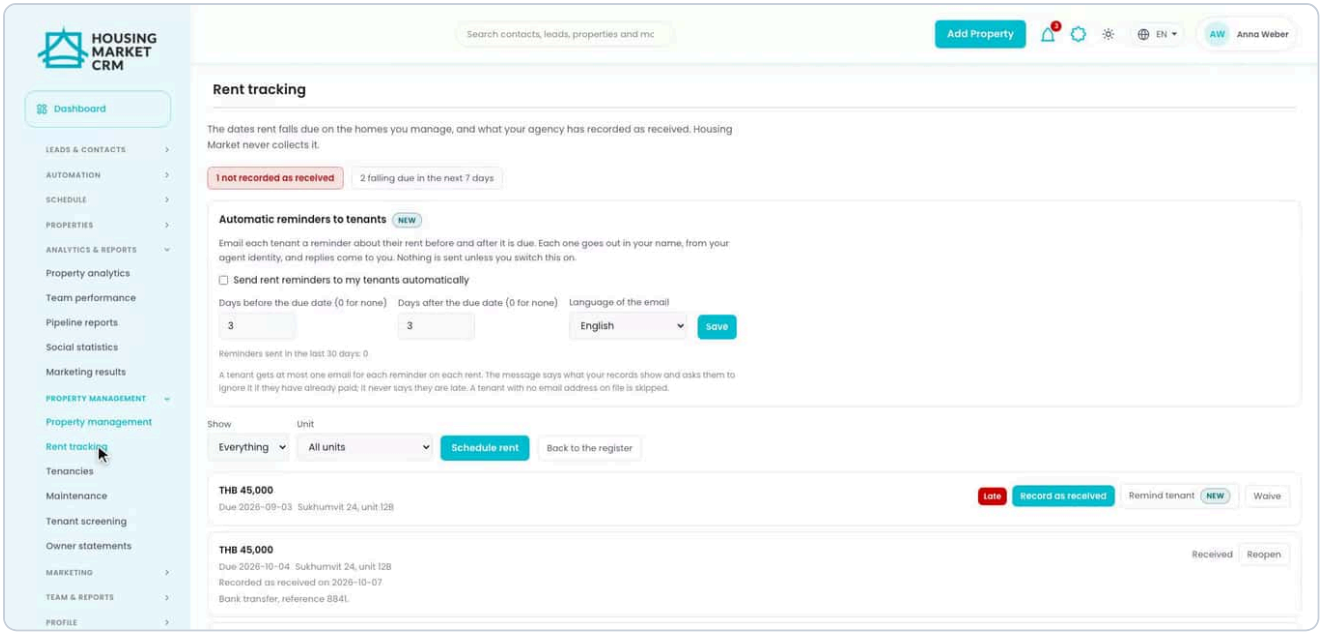


Figure 125.3 · Screen recorded 4 November 2026

4 Your agency's record. Housing Market **never collects rent**.

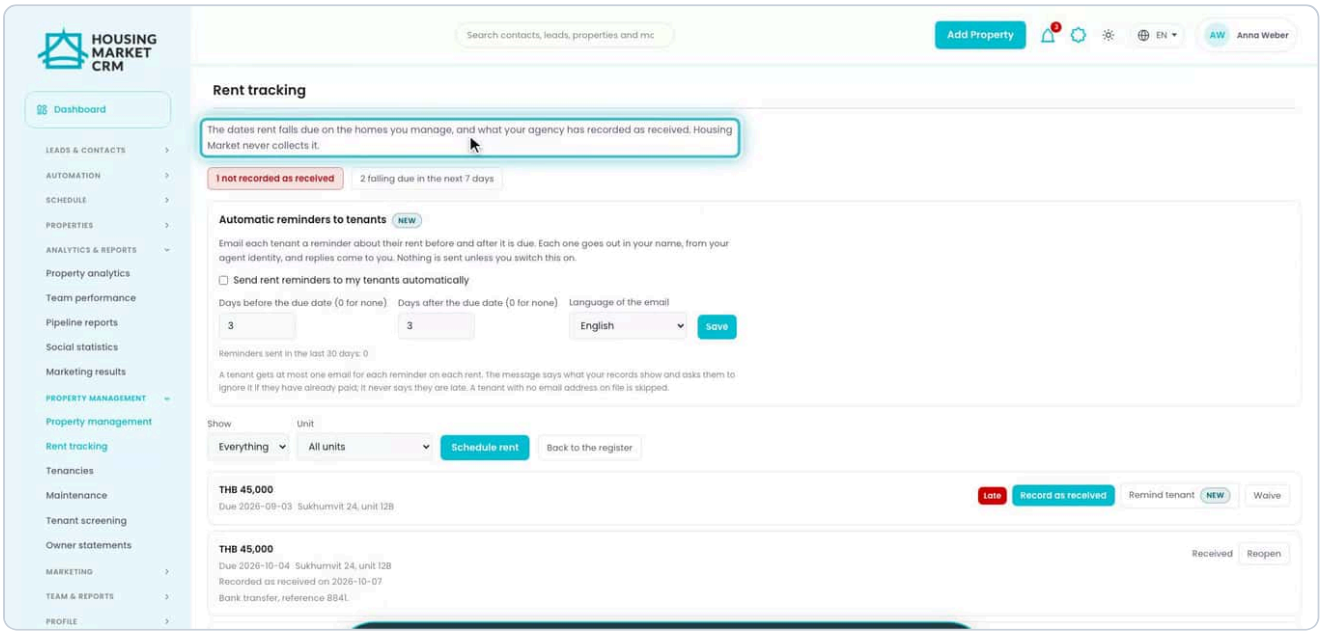


Figure 125.4 · Screen recorded 4 November 2026

5 The card **Automatic reminders to tenants** sends them for you.

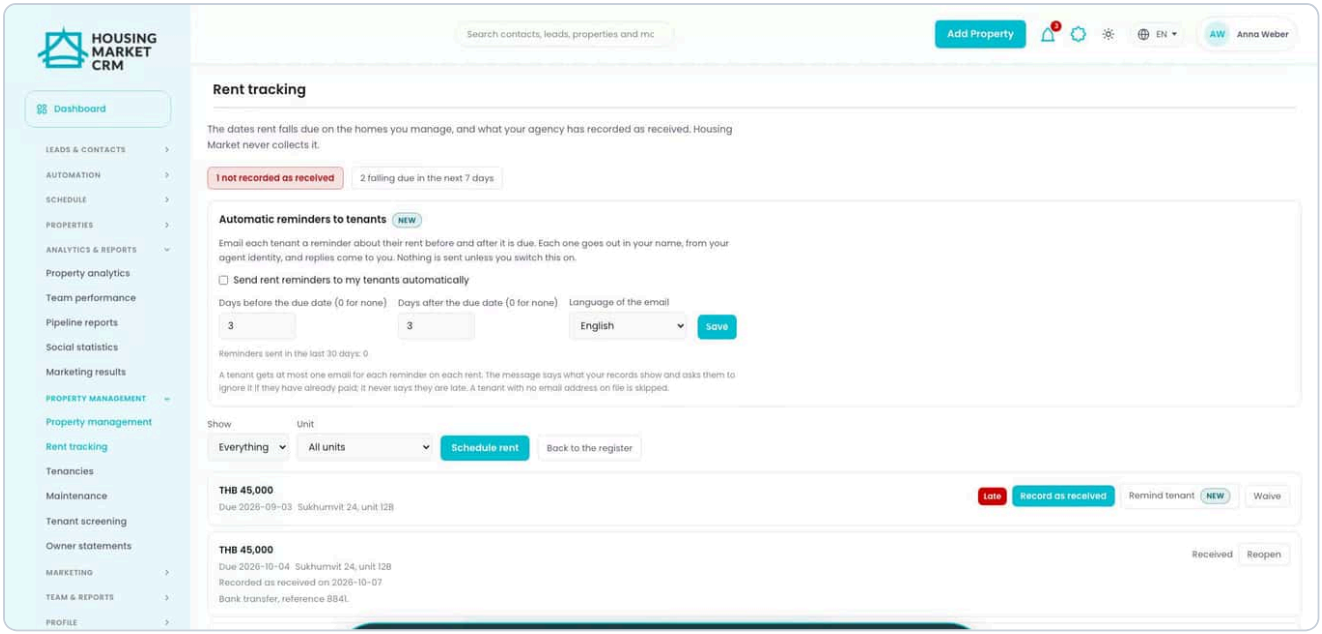


Figure 125.5 · Screen recorded 4 November 2026

6 It is **off** to begin with: nothing is sent unless you switch it on.

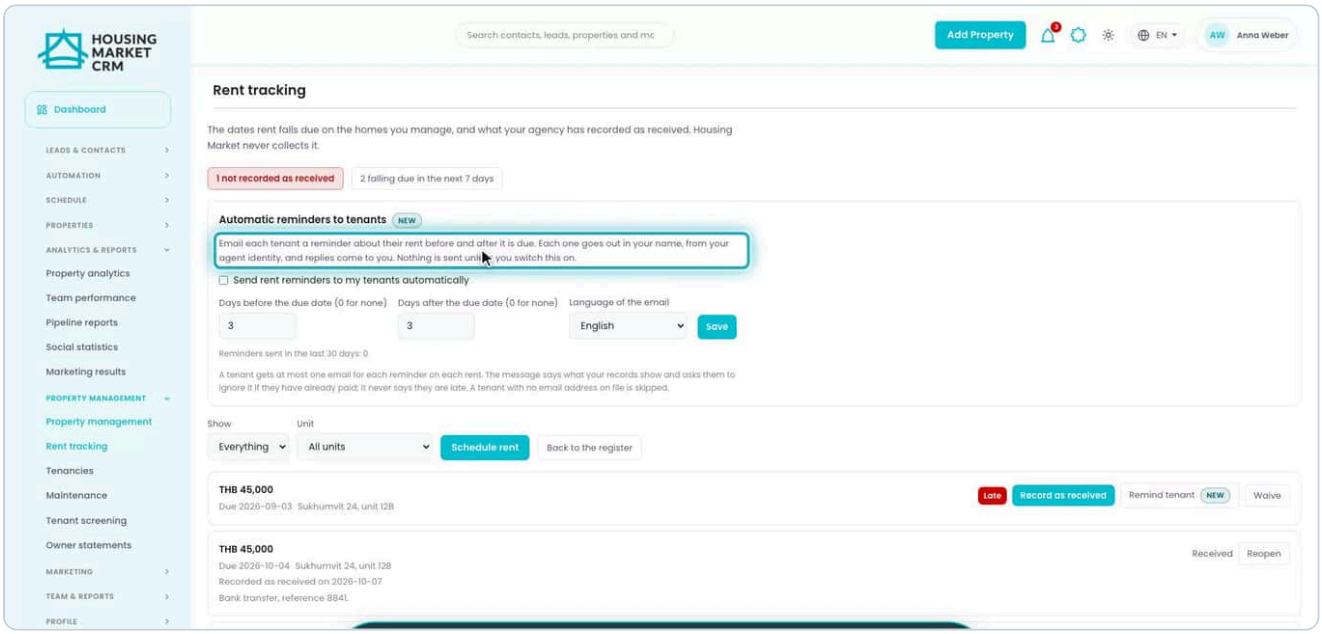


Figure 125.6 · Screen recorded 4 November 2026

7 Tick **Send rent reminders to my tenants automatically**.

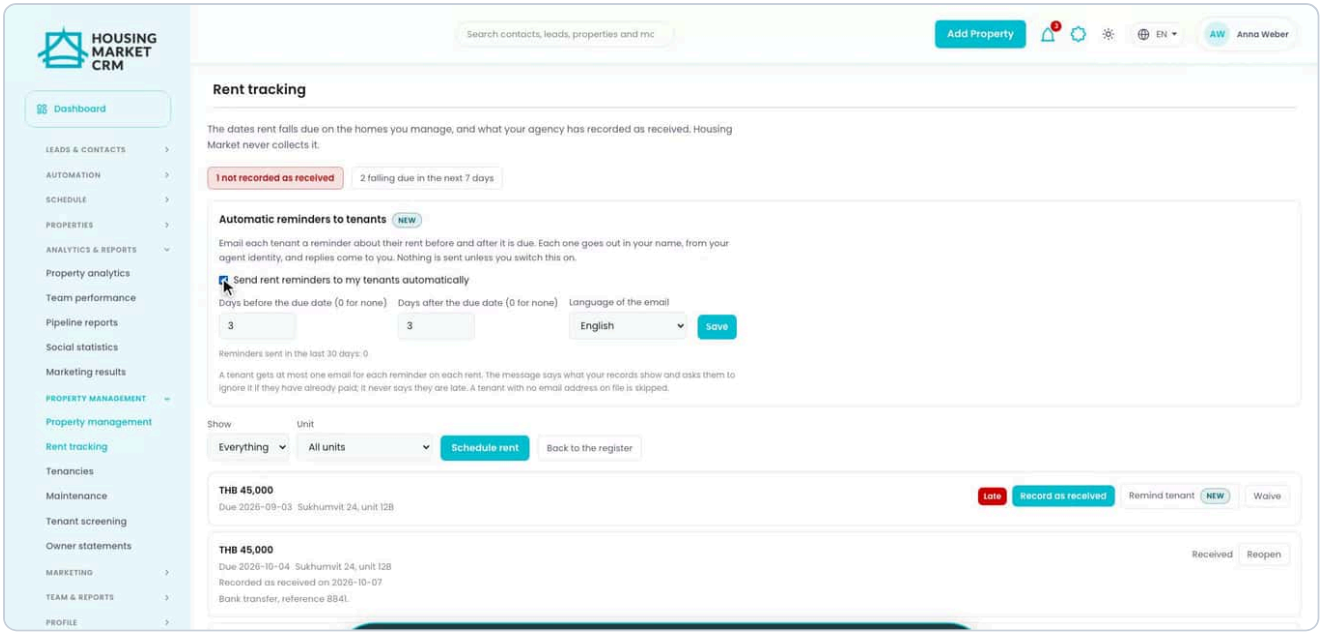


Figure 125.7 · Screen recorded 4 November 2026

8 Type how many **days before** the due date and how many **days after**. **0** turns one off.

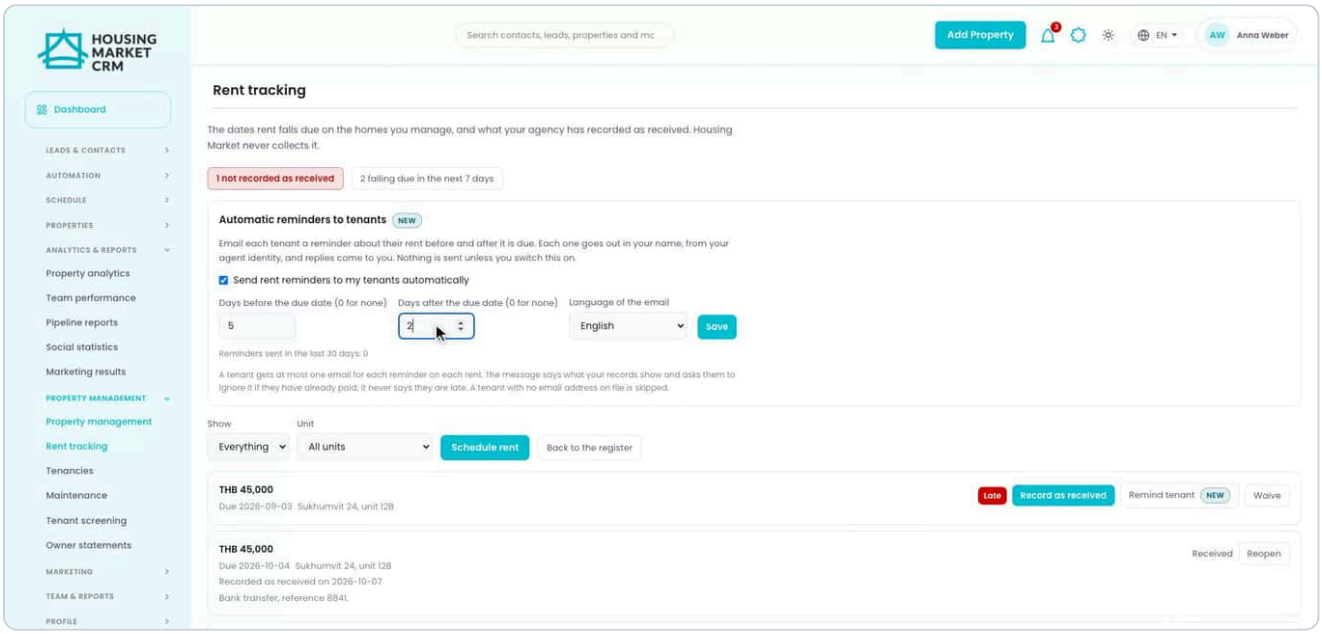


Figure 125.8 · Screen recorded 4 November 2026

9 Pick the **language** of the email.

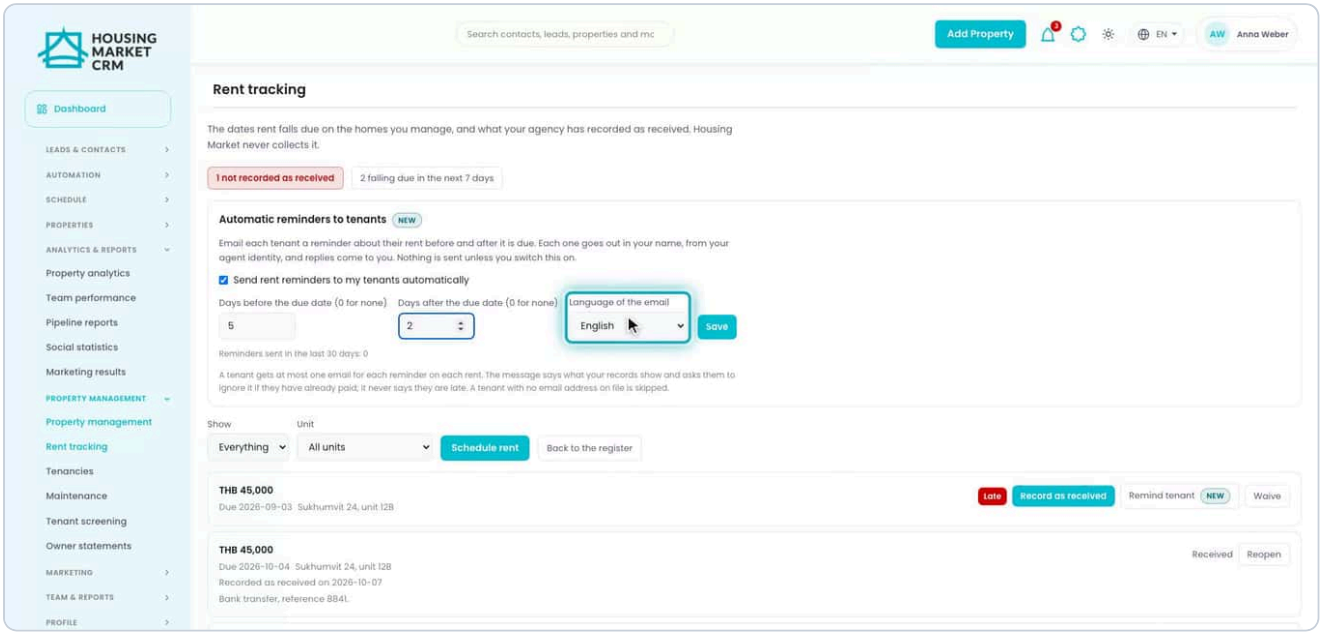


Figure 125.9 · Screen recorded 4 November 2026

10 Click **Save**.

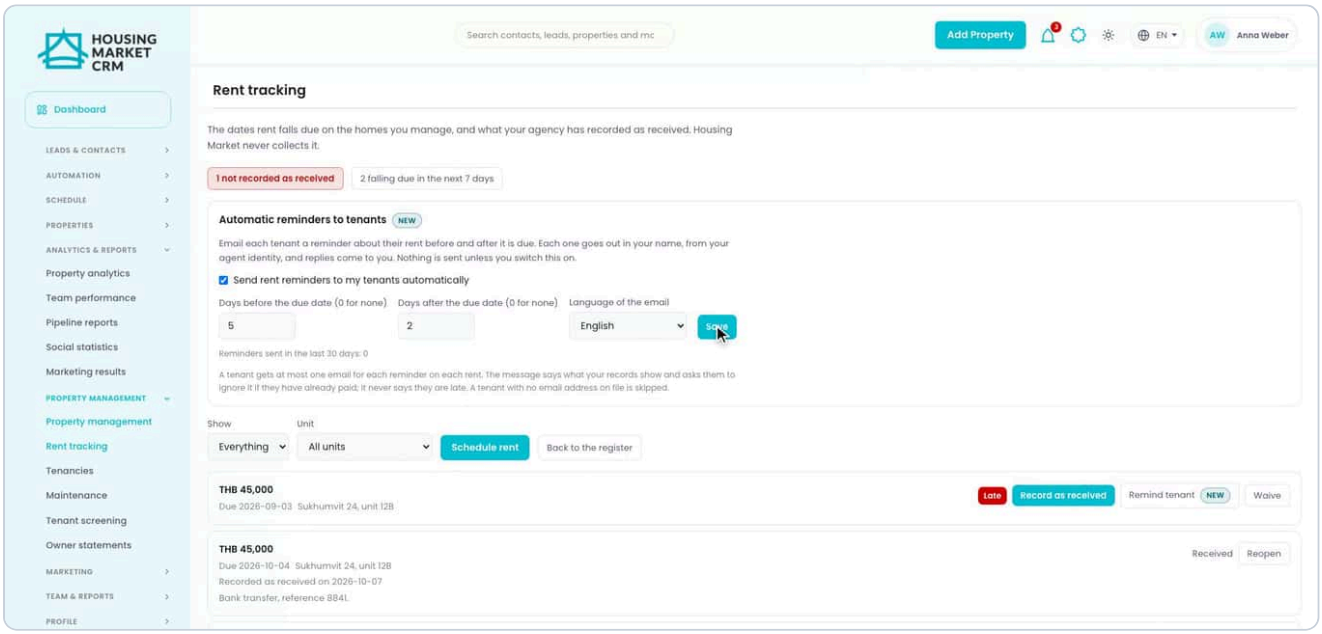


Figure 125.10 · Screen recorded 4 November 2026

11 Your agency's reminders are **on**.

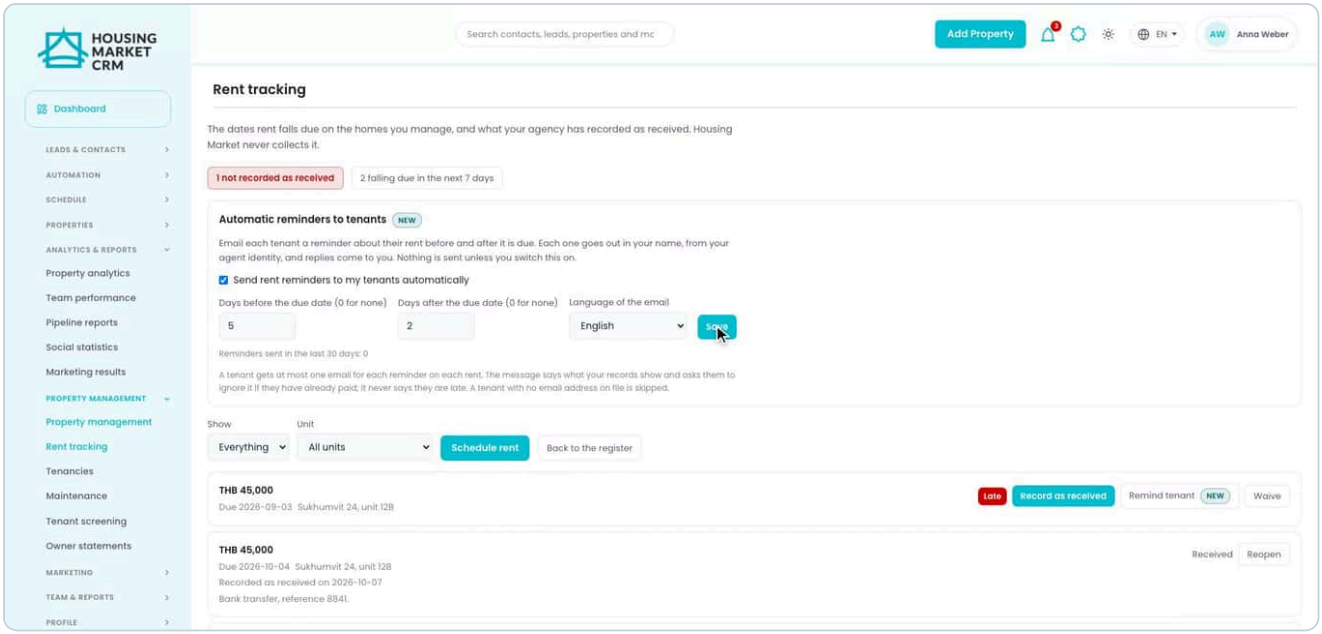


Figure 125.11 · Screen recorded 4 November 2026

12 A tenant gets **at most one email** for each reminder on each rent.

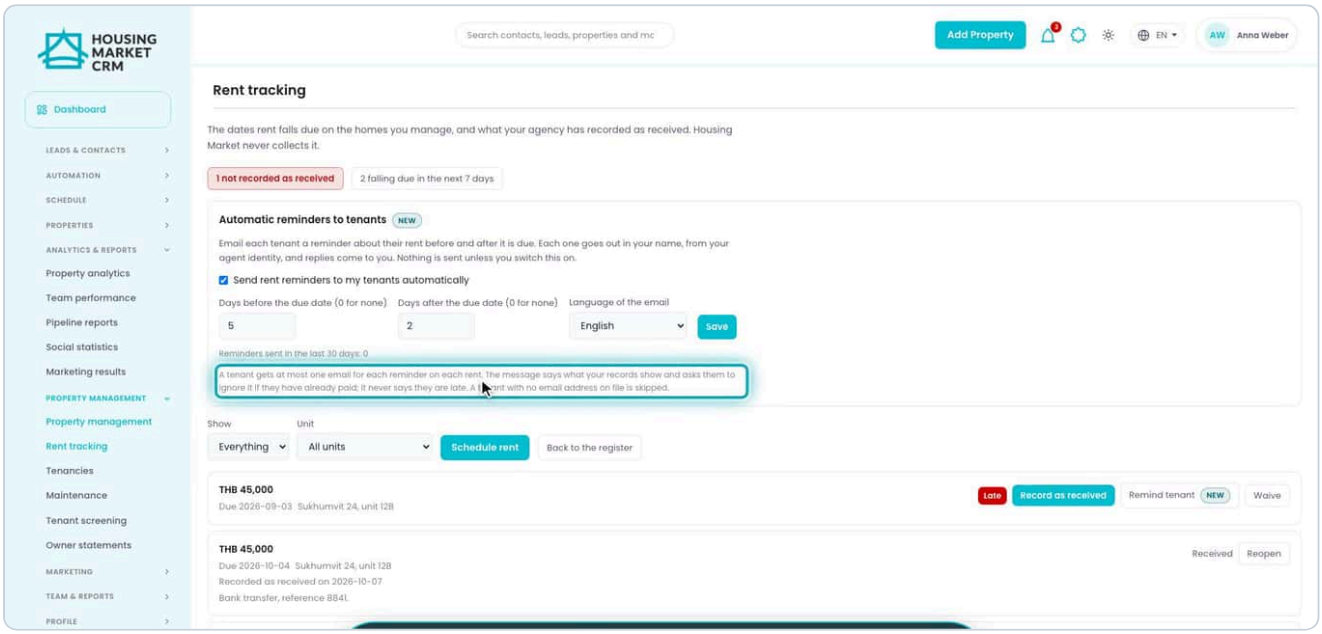


Figure 125.12 · Screen recorded 4 November 2026

13 Here you see how many went out in the **last 30 days**.

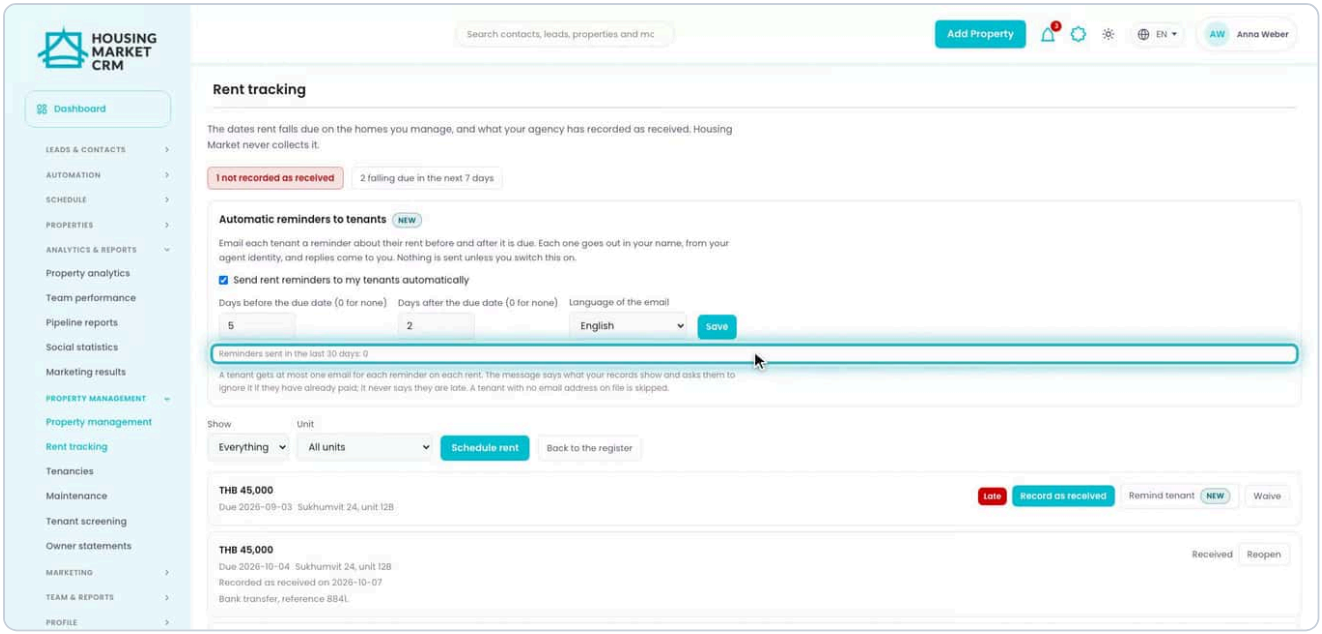


Figure 125.13 · Screen recorded 4 November 2026

14 The email comes from **you**, **never says the tenant is late**, and skips a tenant with **no email address**.

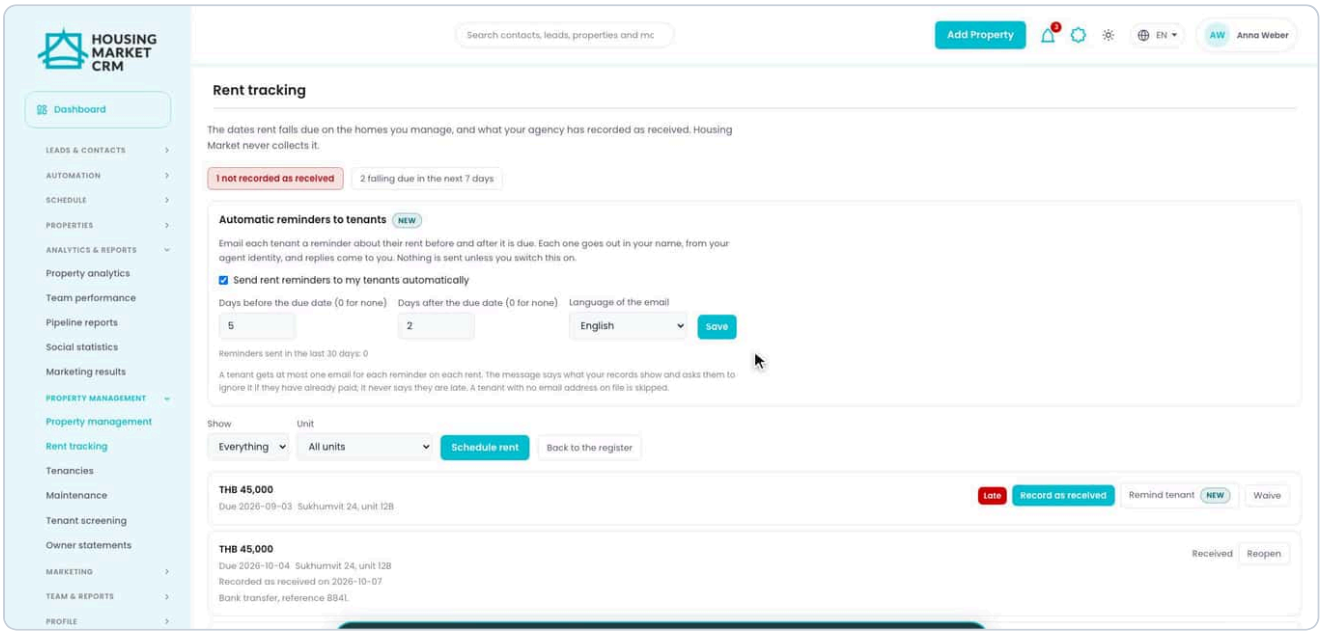


Figure 125.14 · Screen recorded 4 November 2026

RELATED HELP CENTER ARTICLES

What is Property management in the CRM?	faq.housingmarketgroup.com/faq/what-is-property-management-in-the-crm
Does Housing Market collect rent from my tenants?	faq.housingmarketgroup.com/faq/does-housing-market-collect-rent-from-my-tenants

126 CHAPTER 126

Rent reminders for tenants: manual and automatic

Pro and Business | For agents and agencies | Watch the video

OVERVIEW

Yes, where your account has them: Remind tenant on a rent charge, and Send work order on a maintenance request. Rent reminders can also go out on their own, but only after your agency switches that on.

Remind tenant emails the tenant from your agency that your records show an amount as not yet received, and to ignore the message if it has been paid. It is sent by a person in your agency when they choose it. A charge can be reminded about at most once every few days, and each reminder is recorded.

Automatic rent reminders

Rent reminders can also be sent for you, but nothing is sent until your agency switches it on. In Rent tracking, the card Automatic reminders to tenants has the choice Send rent reminders to my tenants automatically, the number of days before the due date and the number of days after it (0 for none, up to 30), and the language of the email.

Each reminder goes out in your name, from your agent identity, and replies come to you. A tenant gets at most one email for each reminder on each rent, only while the rent is still shown as not received, and during the day in your agency's time zone. A tenant with no email address on file is skipped, and a rent you reminded the tenant about by hand a few days ago is left alone. The message says what your records show and asks the tenant to ignore it if they have already paid; it never says they are late. The card shows how many reminders were sent in the last 30 days. Housing Market never collects the rent: a reminder only tells the tenant what your records show.

Send work order emails the contractor the request, its priority, the unit's address and your agency's contact details. It carries no amount: Manager never handles payments.

From the Help Center: **Can I remind a tenant about rent or send a work order to a contractor?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

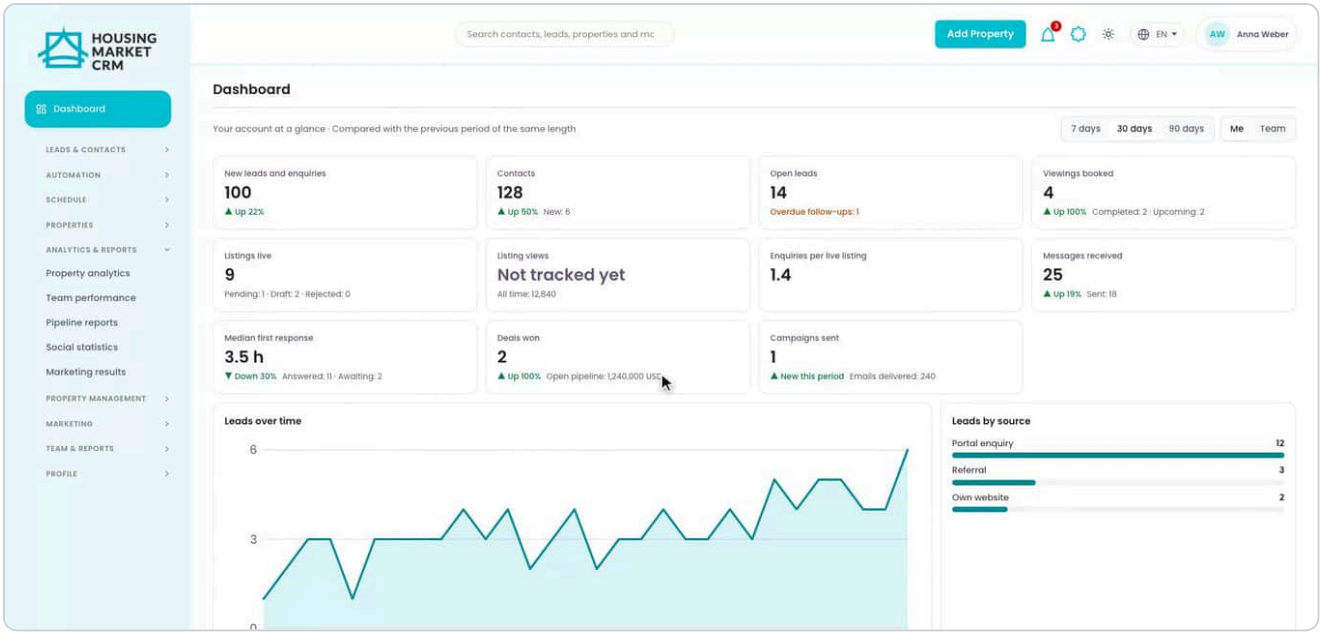


Figure 126.1 · Screen recorded 1 November 2026

2 Open **Property management** in the left menu.

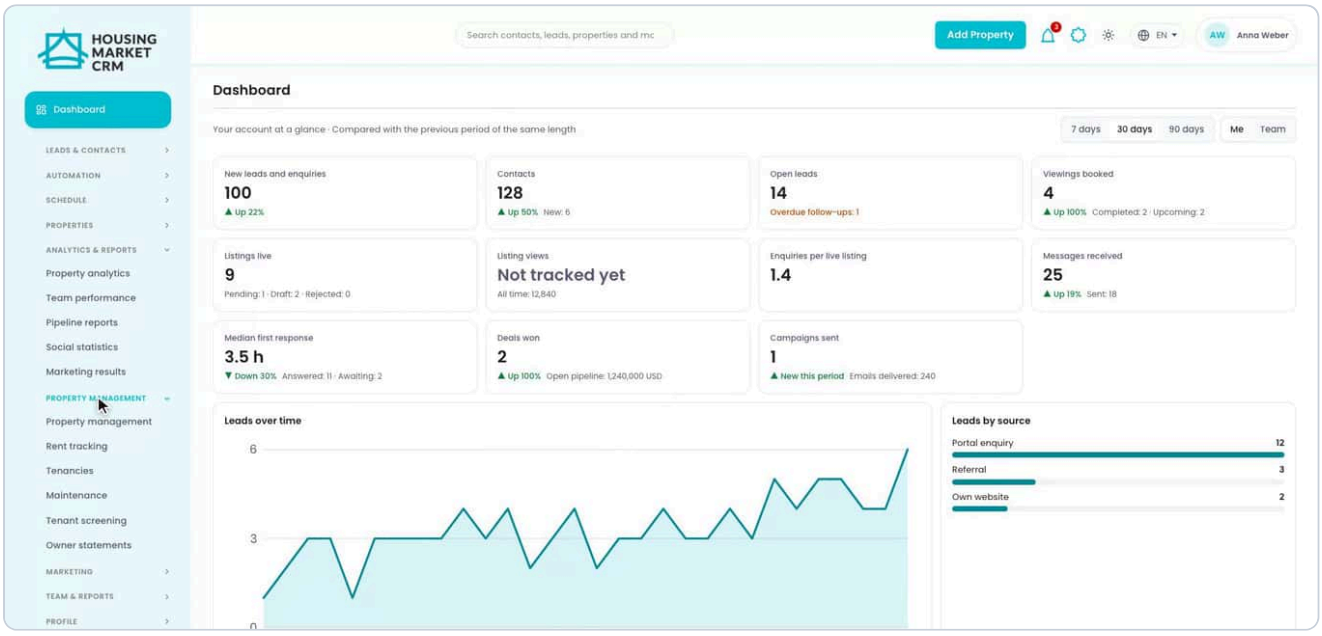


Figure 126.2 · Screen recorded 1 November 2026

3 Click **Rent tracking**.

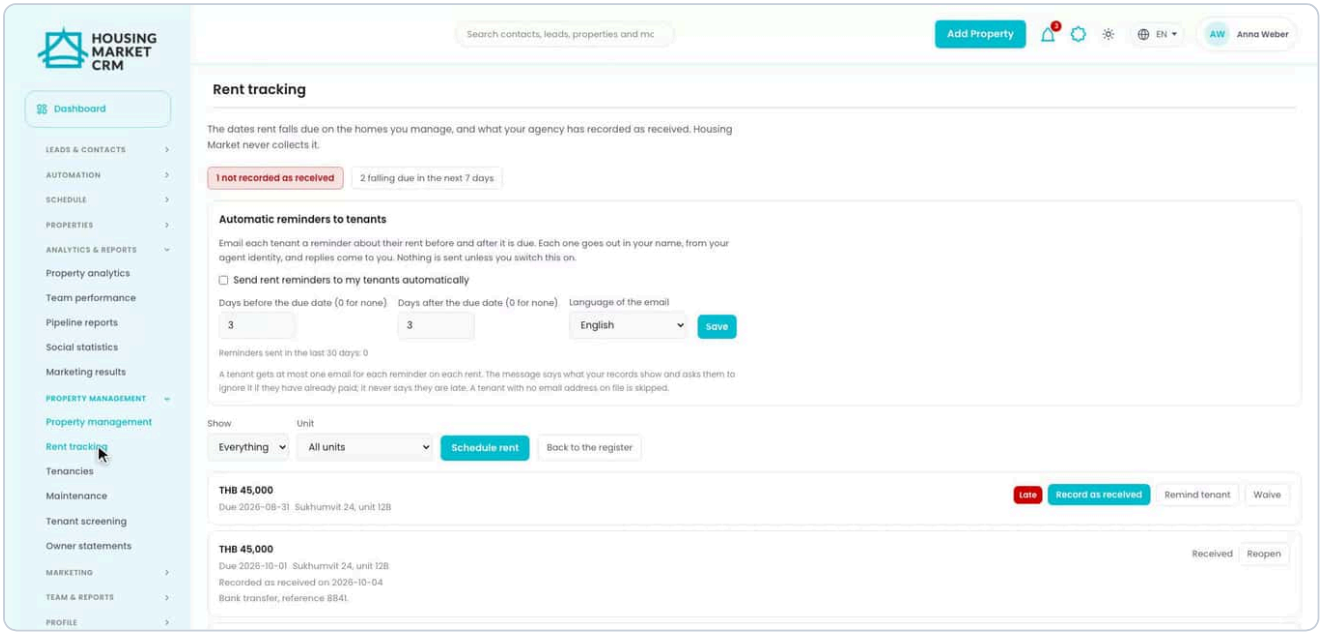


Figure 126.3 · Screen recorded 1 November 2026

4 Your agency's record. Housing Market **never collects rent**.

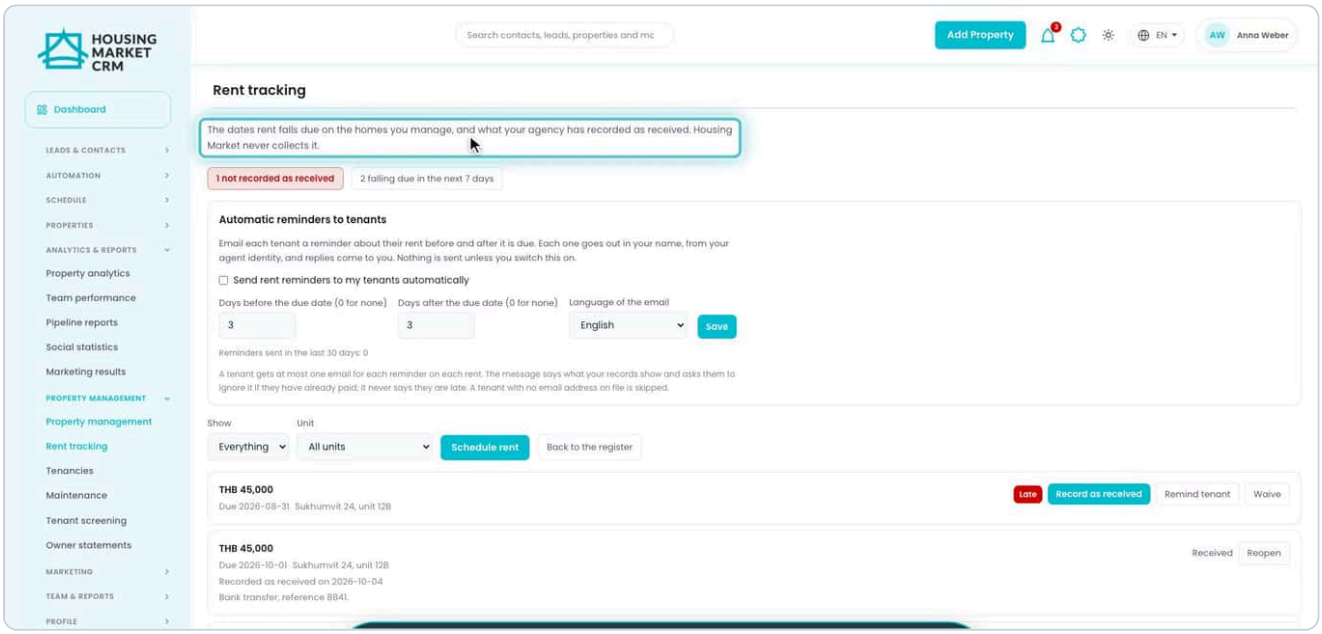


Figure 126.4 · Screen recorded 1 November 2026

5 This month is **late**.

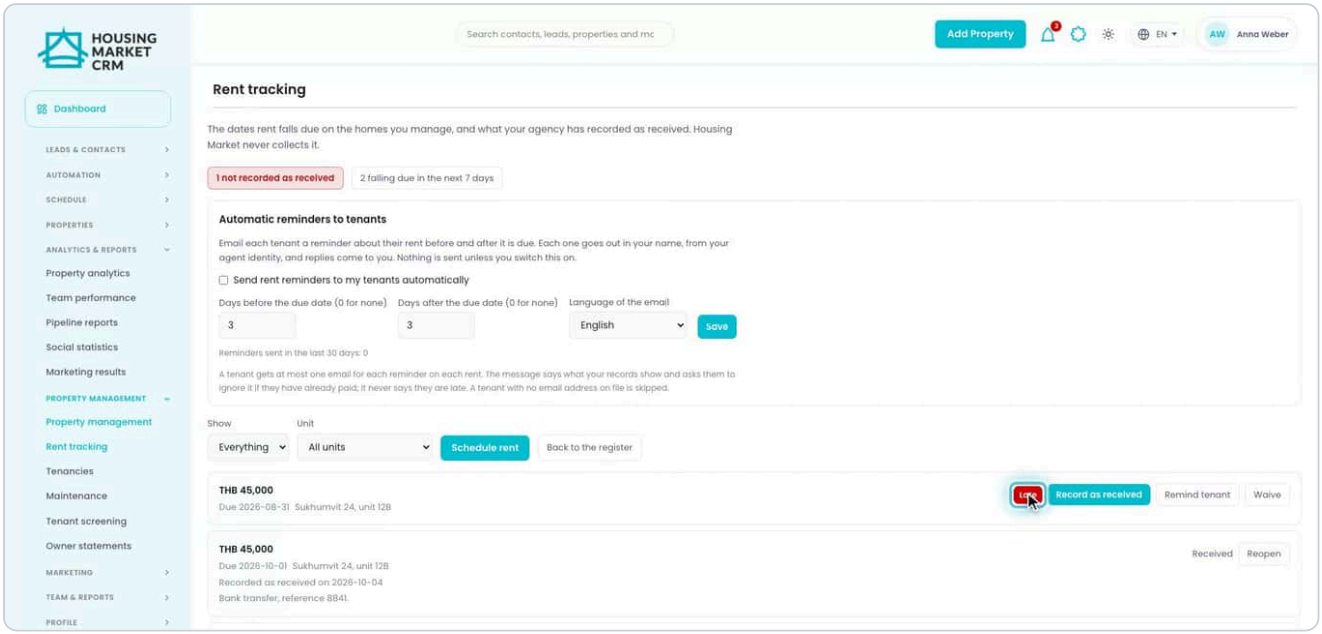


Figure 126.5 · Screen recorded 1 November 2026

6 **Remind tenant** appears on rent that is still **due**.

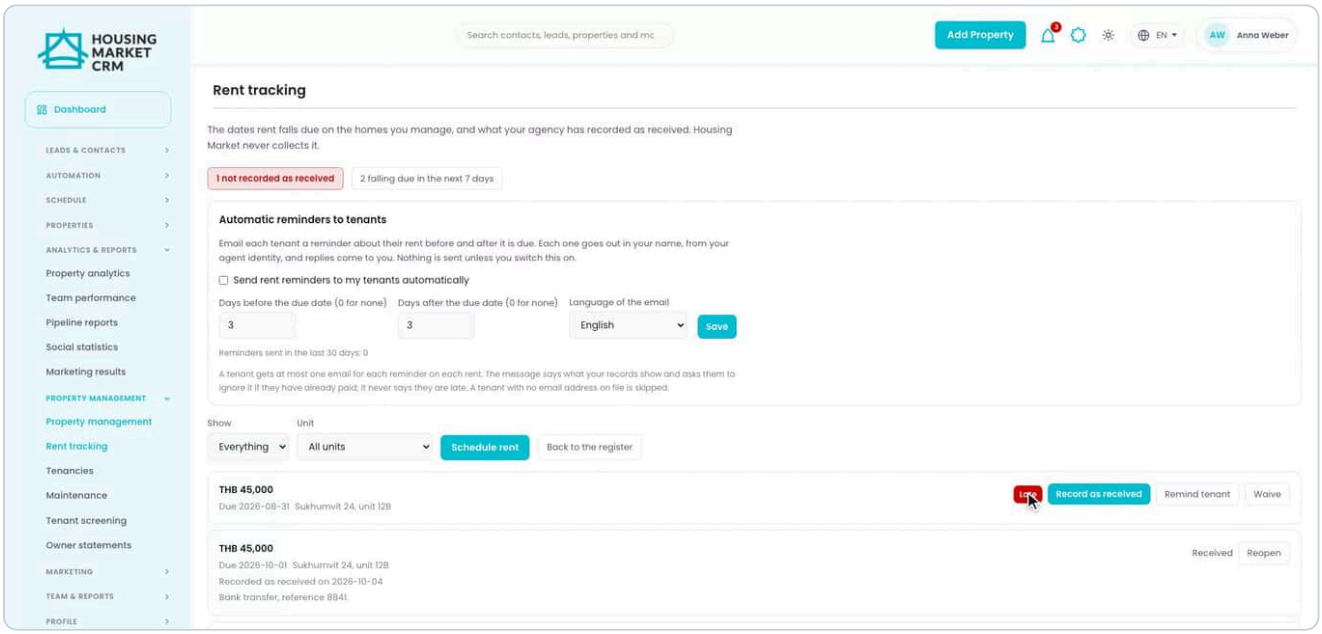


Figure 126.6 · Screen recorded 1 November 2026

7 Click **Remind tenant.**

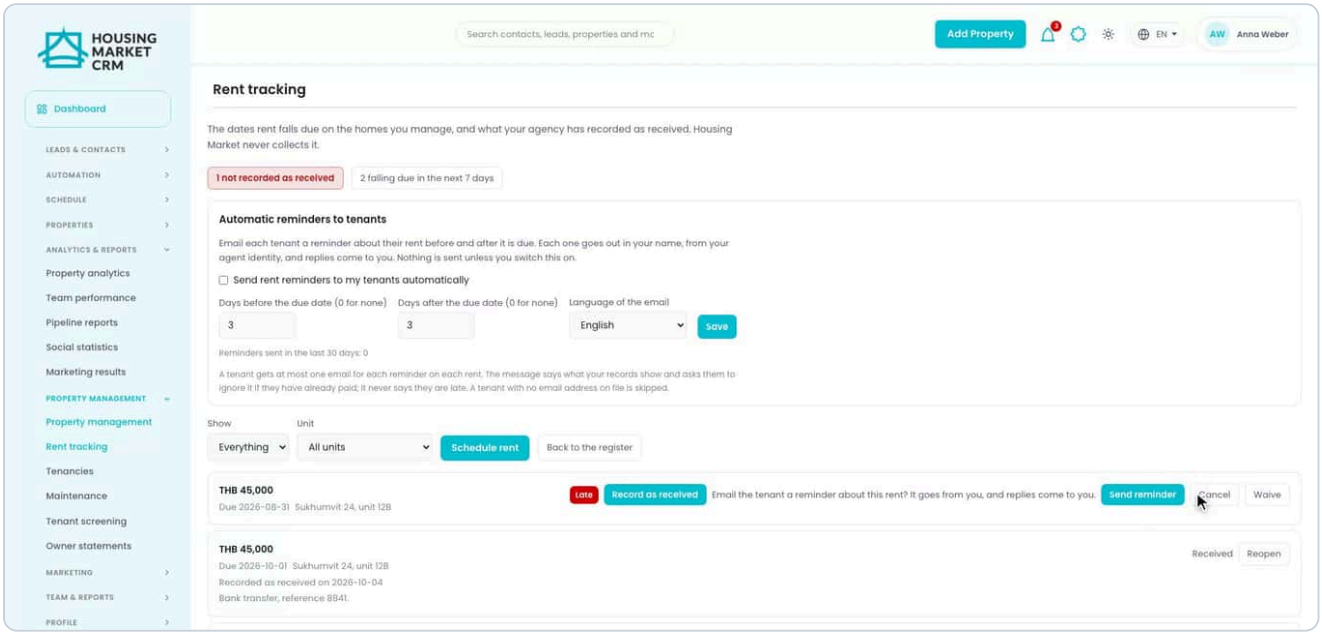


Figure 126.7 · Screen recorded 1 November 2026

8 It goes **from you**, and replies **come to you.**

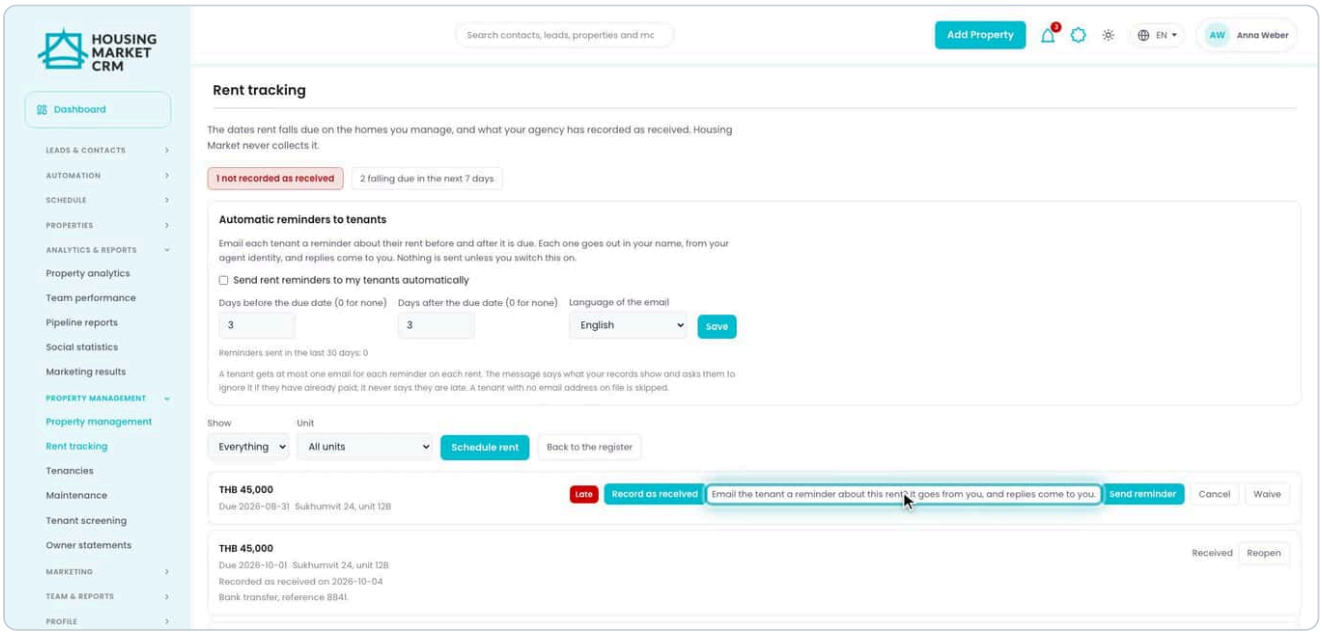


Figure 126.8 · Screen recorded 1 November 2026

9 Click **Send reminder** to confirm.

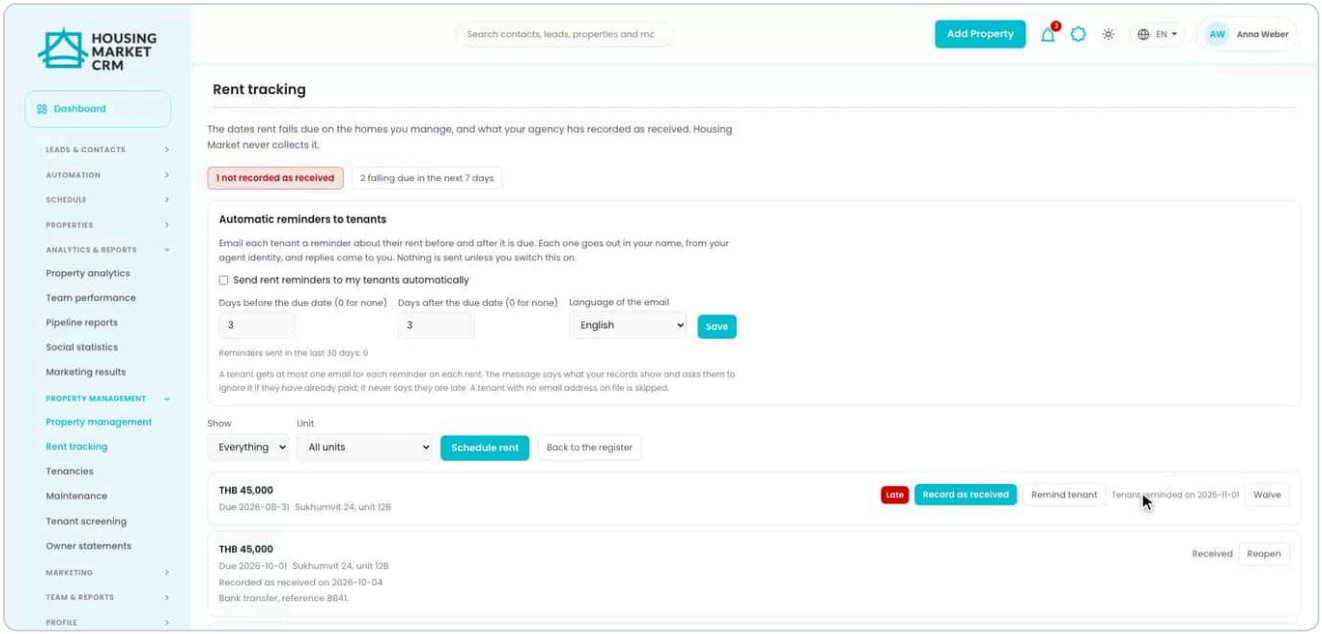


Figure 126.9 · Screen recorded 1 November 2026

10 The charge now shows **when the tenant was reminded**.

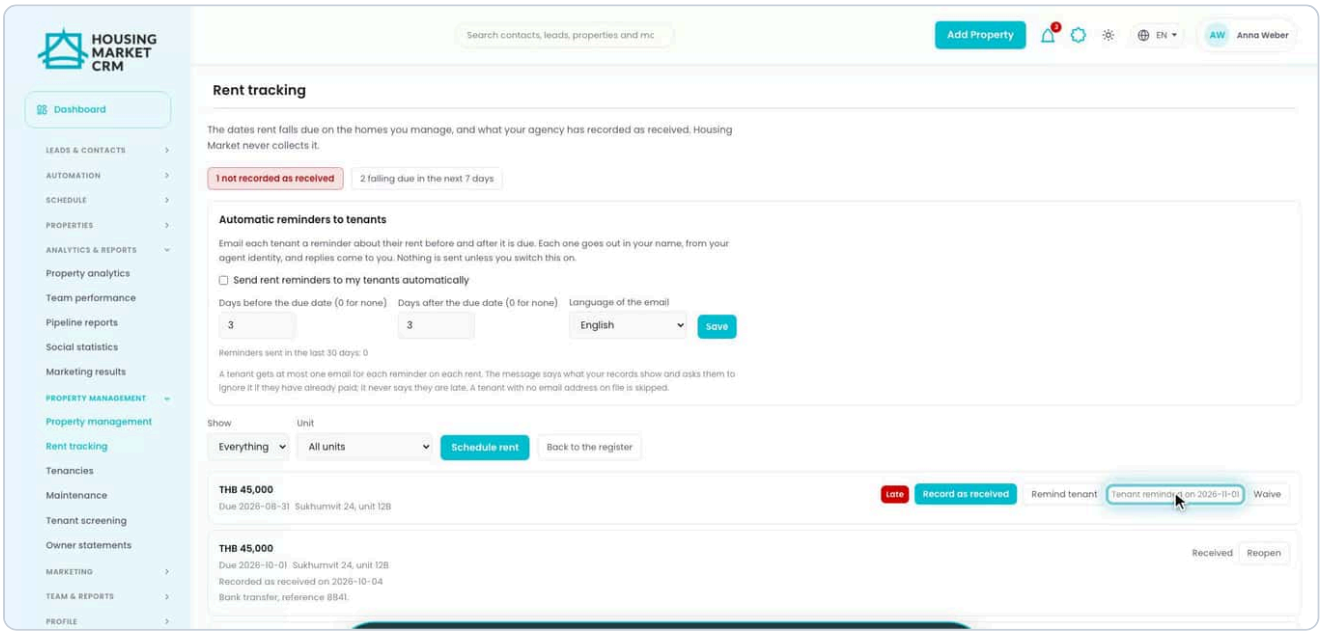


Figure 126.10 · Screen recorded 1 November 2026

11 Your agency can also send reminders **automatically**.

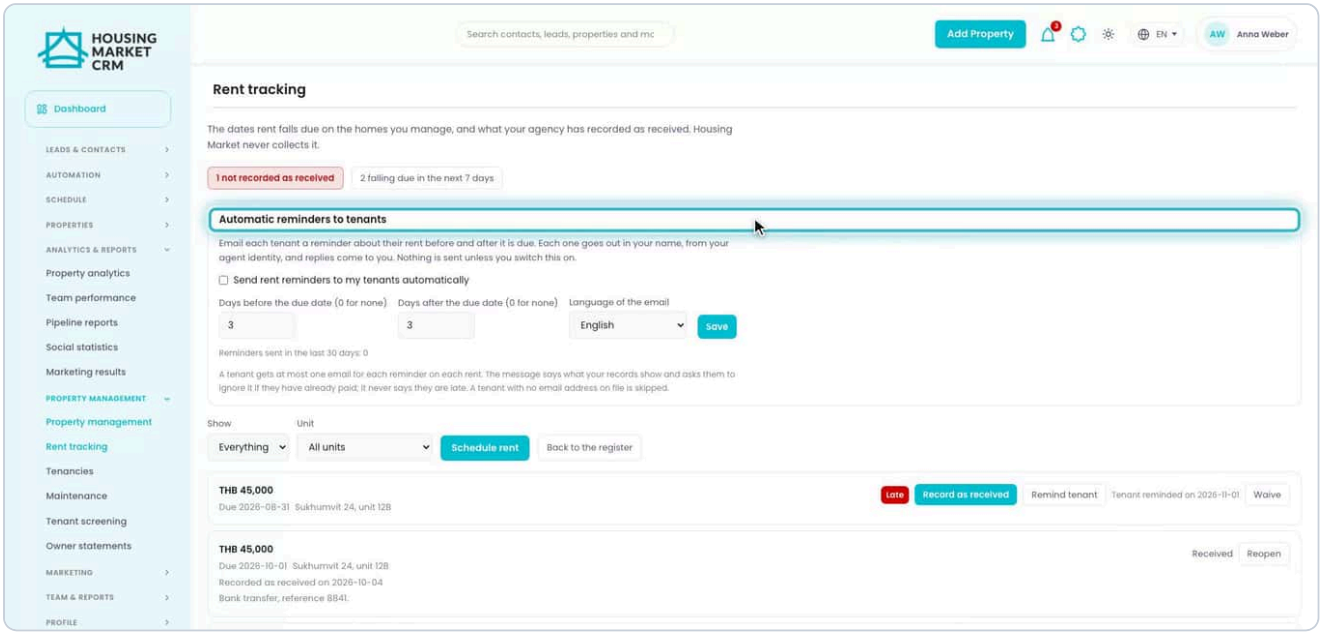


Figure 126.11 · Screen recorded 1 November 2026

12 Nothing is sent **unless you switch this on**.

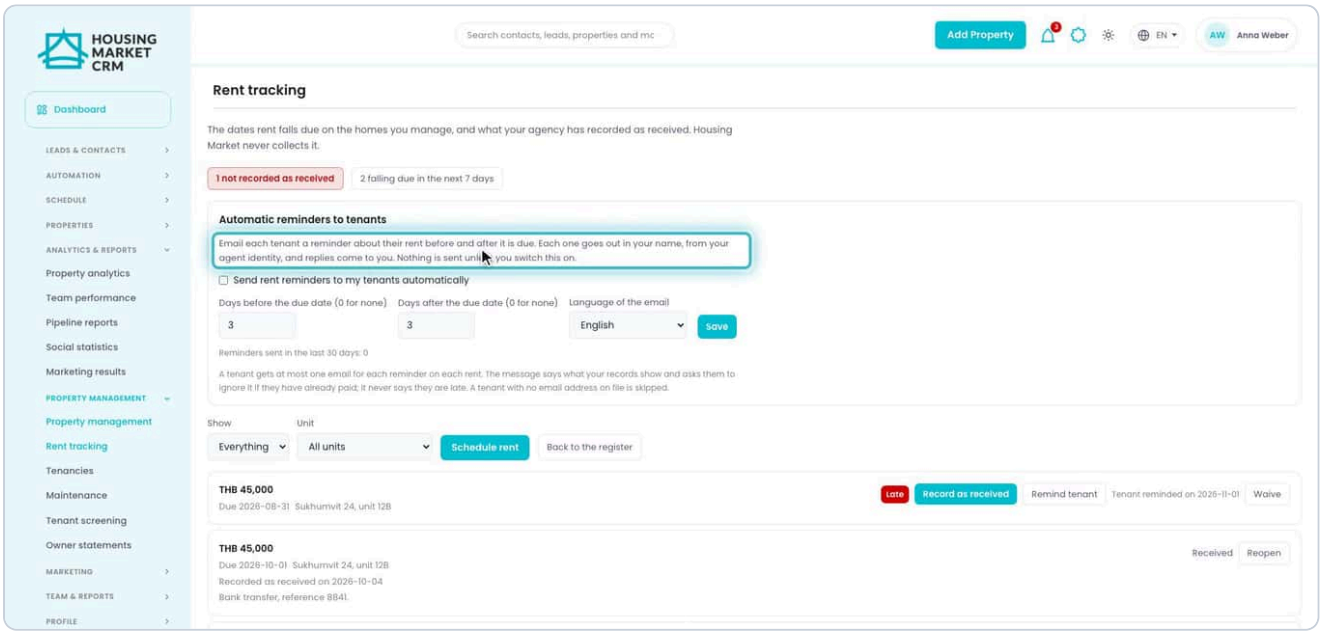


Figure 126.12 · Screen recorded 1 November 2026

13 Tick **Send rent reminders to my tenants automatically**.

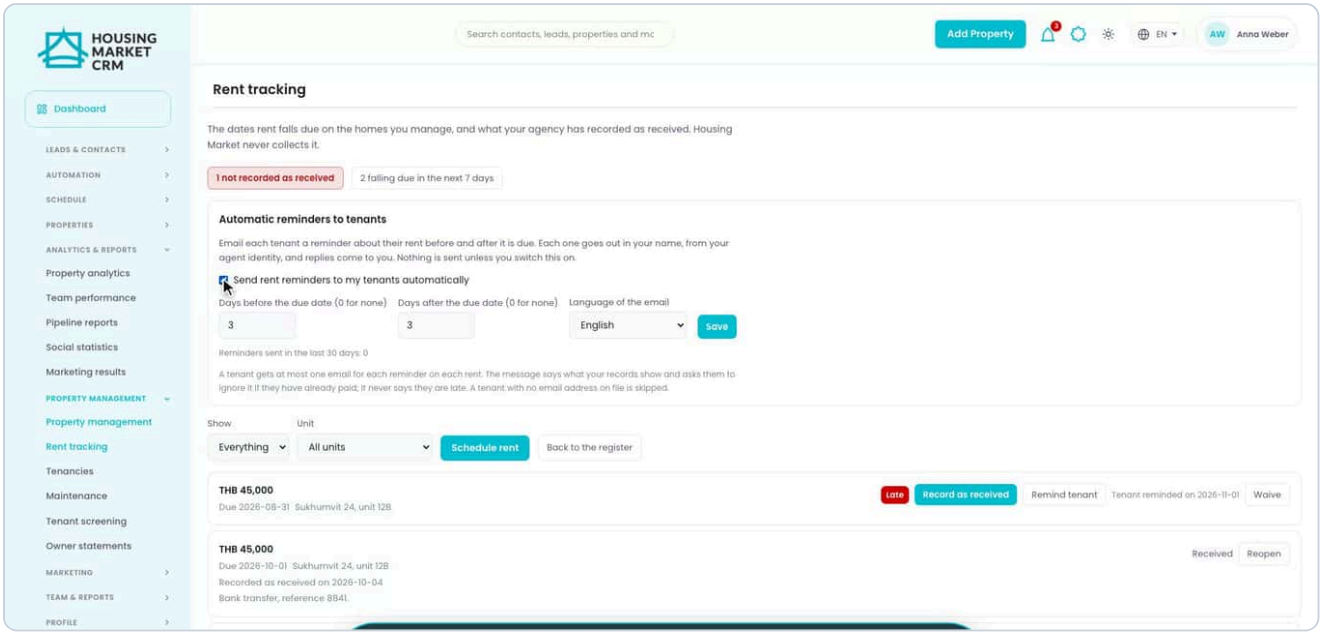


Figure 126.13 · Screen recorded 1 November 2026

14 Choose how many **days before** the due date and how many **days after**. **0** turns one off.

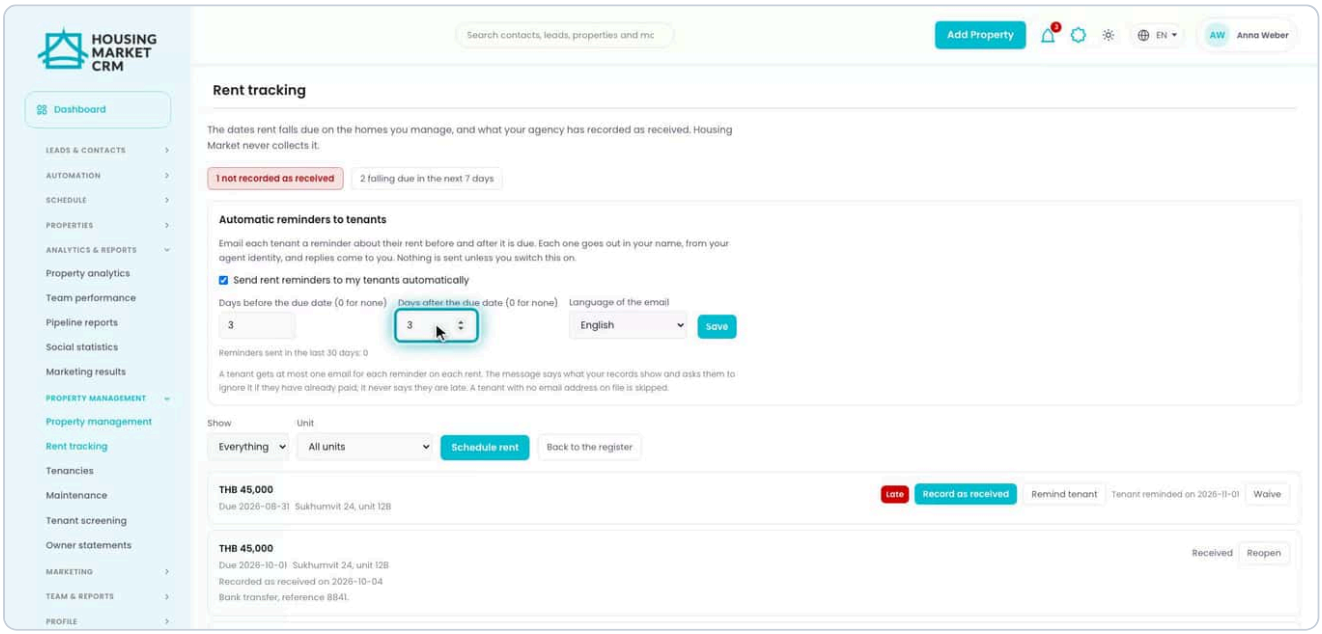


Figure 126.14 · Screen recorded 1 November 2026

15 Click **Save**.

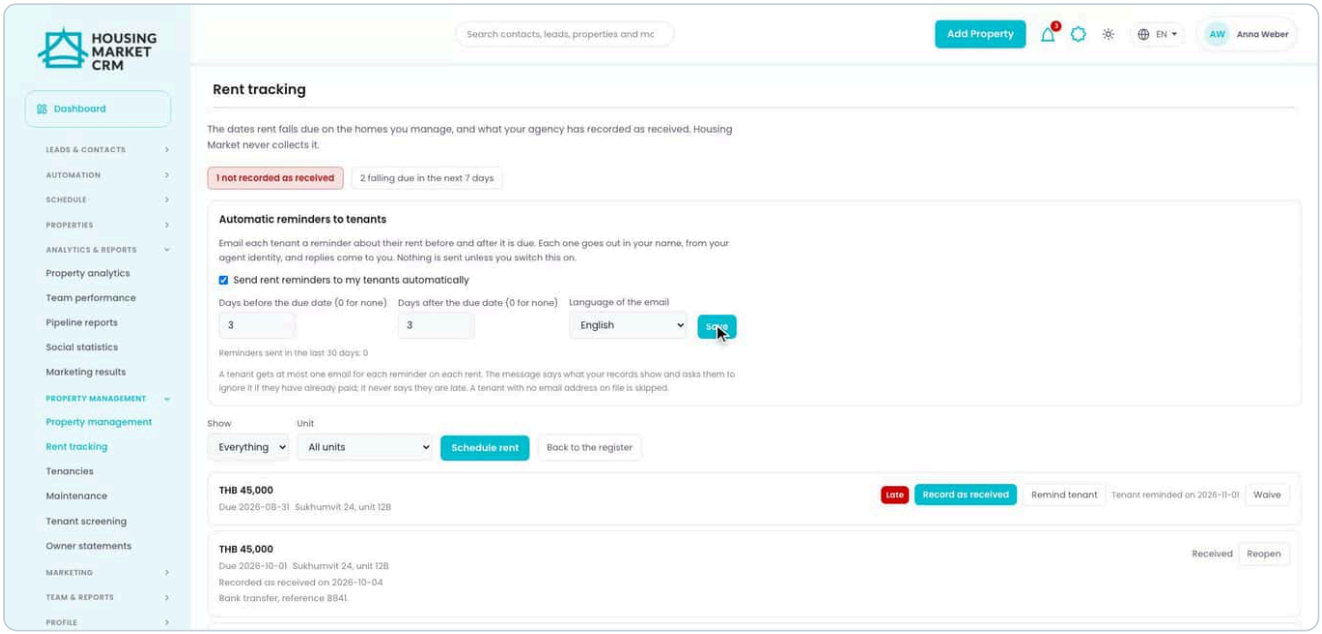


Figure 126.15 · Screen recorded 1 November 2026

16 A tenant gets **at most one email** for each reminder on each rent.

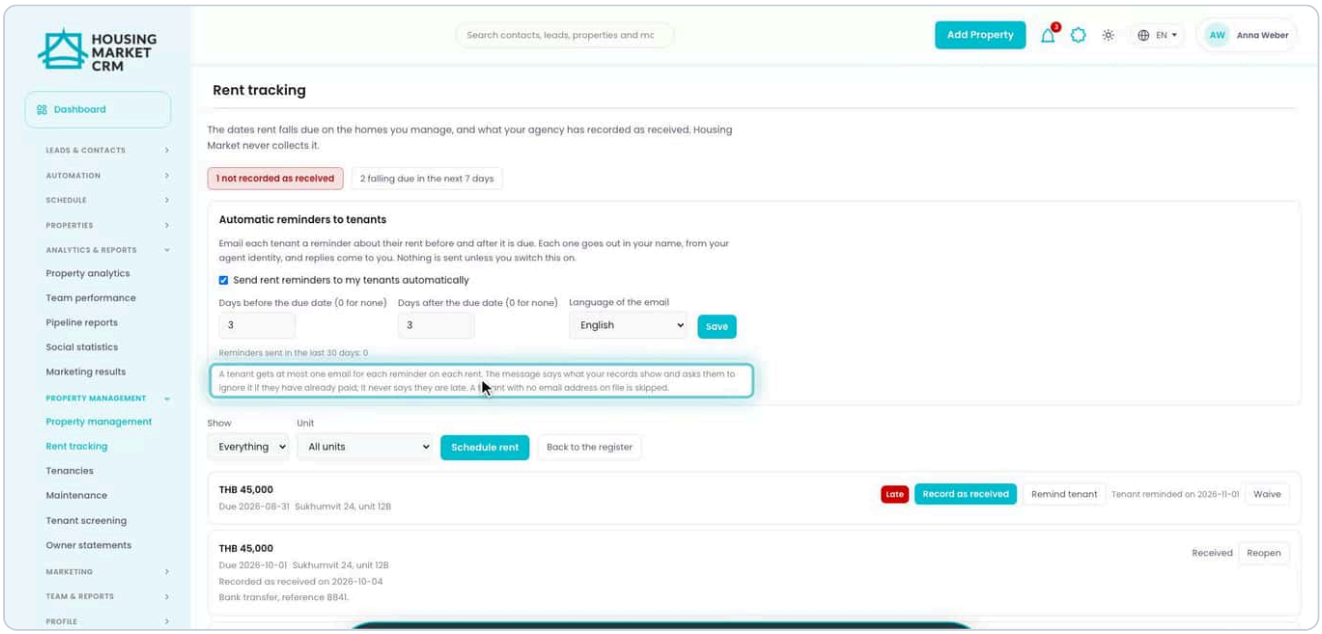


Figure 126.16 · Screen recorded 1 November 2026

17 The email **never says the tenant is late**, and you can switch it off at any time.

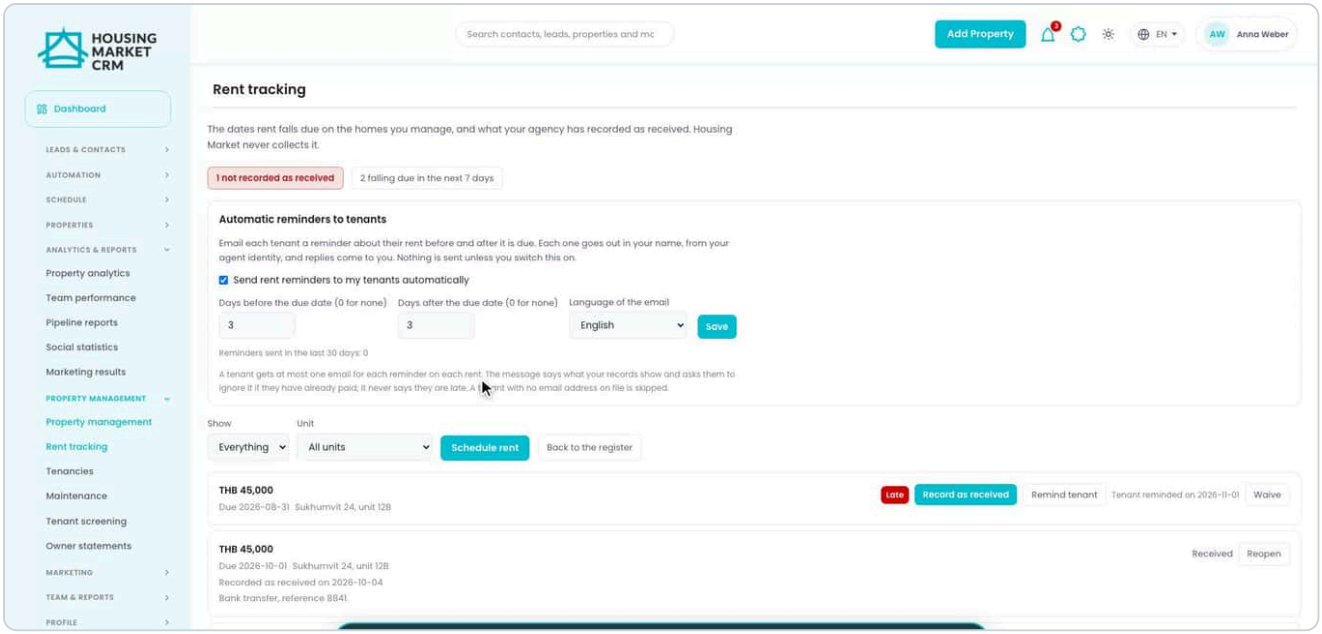


Figure 126.17 · Screen recorded 1 November 2026

RELATED HELP CENTER ARTICLES

What is Property management in the CRM?	faq.housingmarketgroup.com/faq/what-is-property-management-in-the-crm
Does Housing Market collect rent from my tenants?	faq.housingmarketgroup.com/faq/does-housing-market-collect-rent-from-my-tenants

PART 10

Your team

127 Add a team member

128 Set team roles

129 Assign a lead to an agent

130 Lead routing

131 The team leaderboard

132 Your weekly stats email

133 The audit log

134 Extra users

127 CHAPTER 127

Add a team member

Business | For office managers | Watch the video

OVERVIEW

Yes, on the Business plan: up to 10 users included, then 5 USD per additional user per month, with admin, manager and agent roles, assignment rules, and one view across every agent's board.

Free and Pro are each for 1 user, the account owner. Business includes up to 10 users on one account, and each additional user after that is 5 USD per month. Colleagues join by an email invitation, and each person is an admin, a manager or an agent.

A manager also holds one of four grades, set beside their role under Members on the Team page. The grades build on each other:

- Viewer — reads the whole office and changes nothing
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- Remover — everything an Assigner may do, plus deleting records

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A manager can also see every agent's board in one view, and Business carries the team leaderboard, the audit log of who changed what, and commission tracking with splits between agents.

From the Help Center: **Can multiple team members use the CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

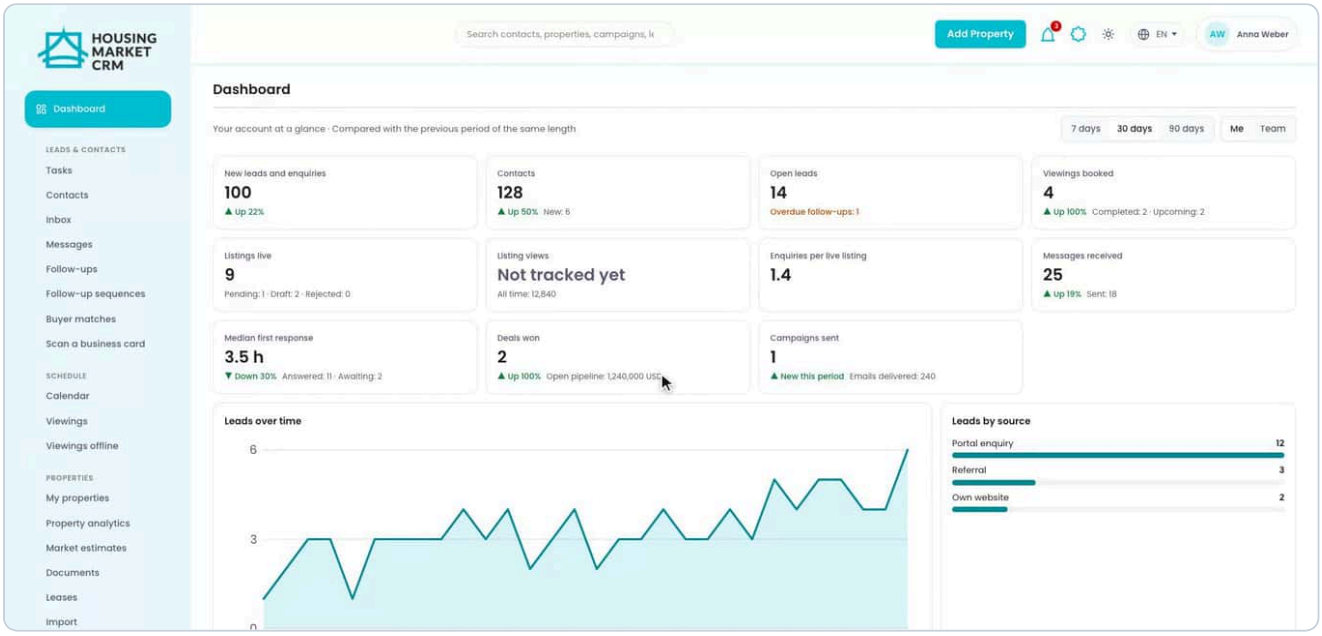


Figure 127.1 · Screen recorded 24 September 2026

2 Click **Team** in the left menu.

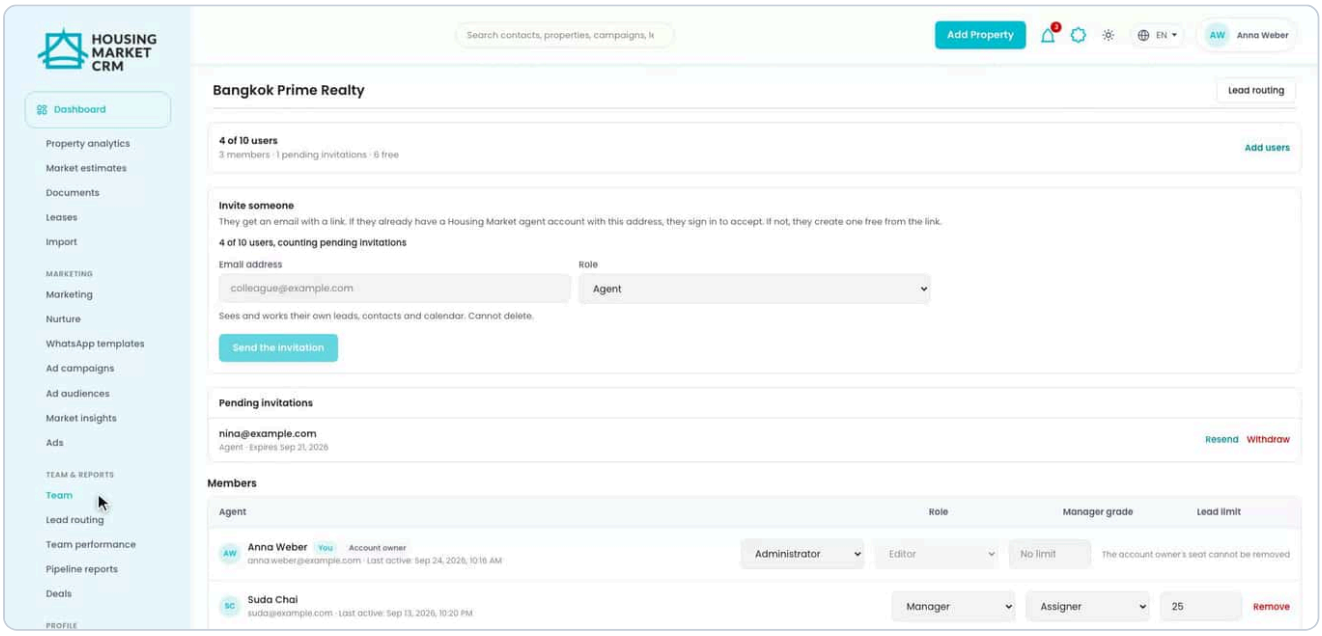


Figure 127.2 · Screen recorded 24 September 2026

3 The counter shows how many **seats** are in use.

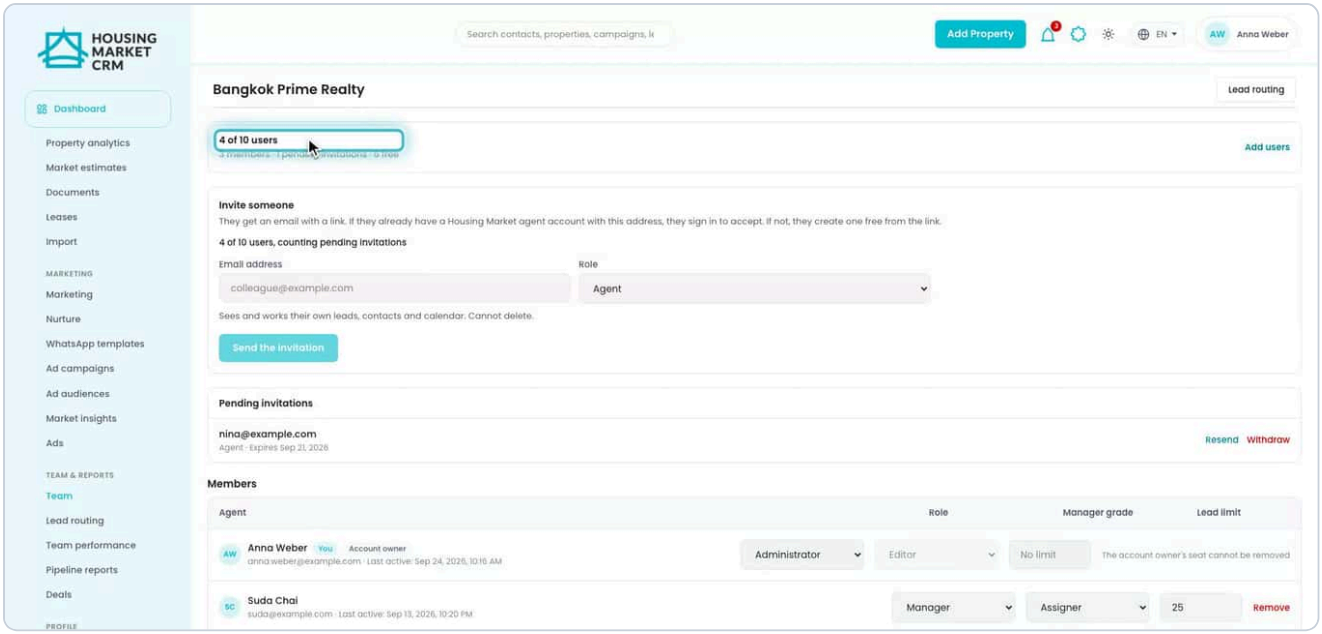


Figure 127.3 · Screen recorded 24 September 2026

4 Enter your colleague's **email address**.

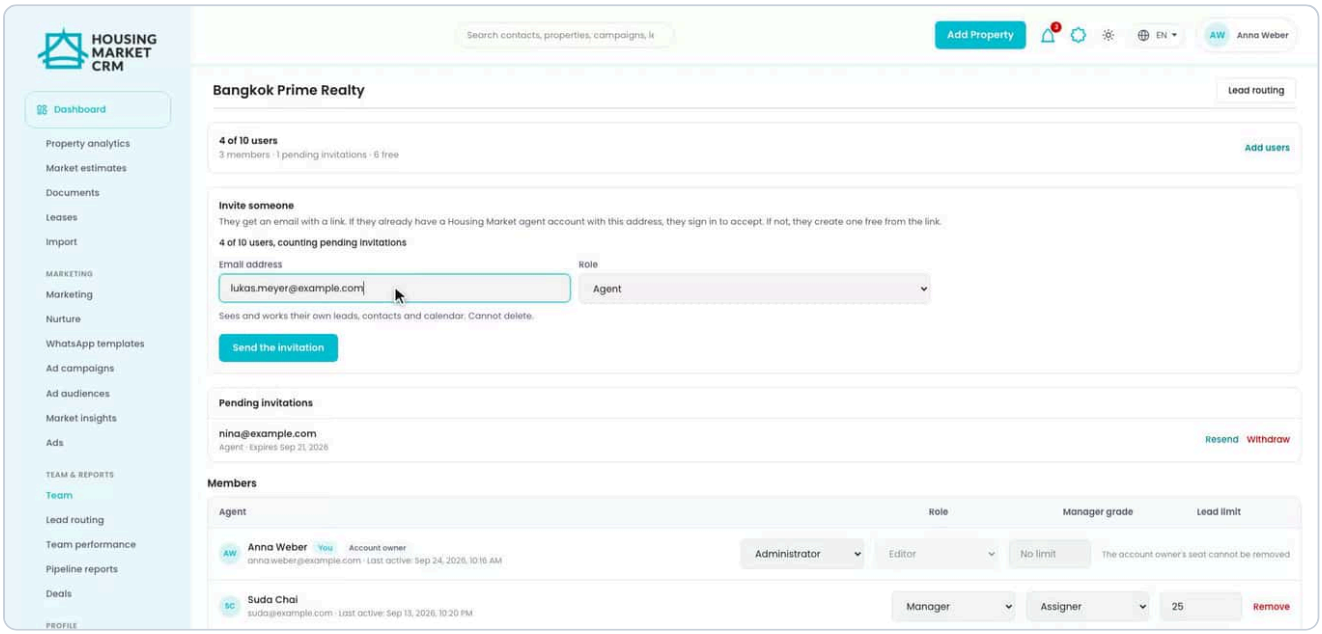


Figure 127.4 · Screen recorded 24 September 2026

5 Choose a **role** — Agent, Manager or Administrator.

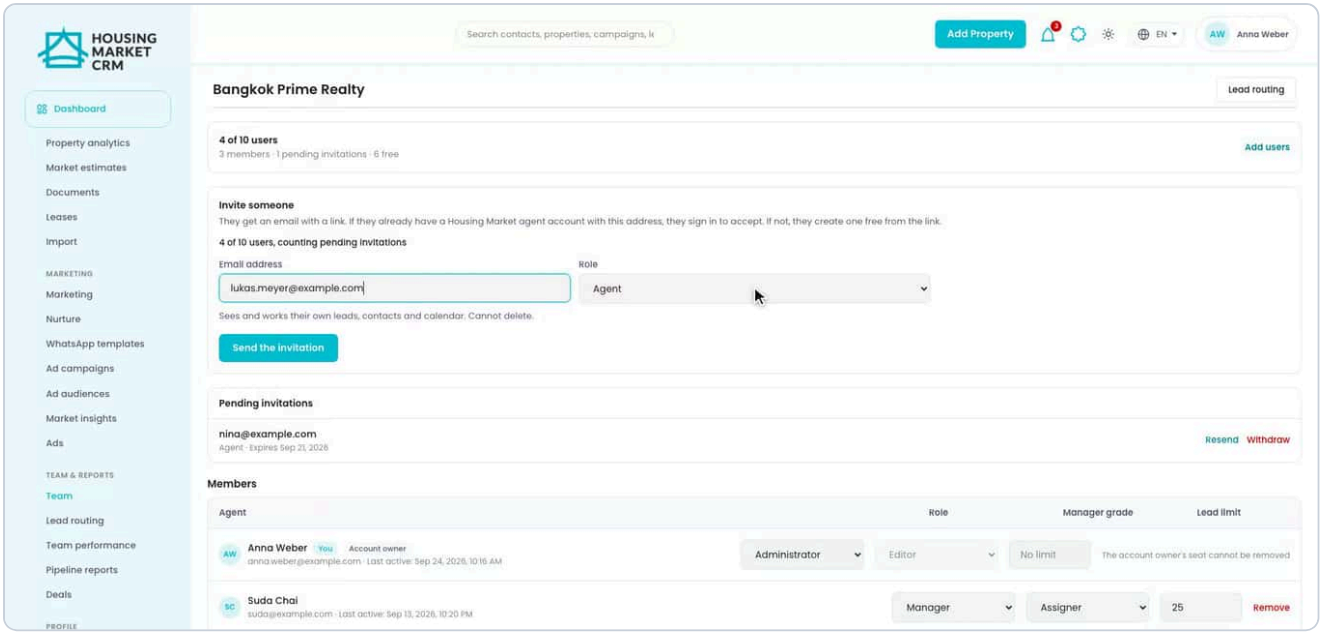


Figure 127.5 · Screen recorded 24 September 2026

6 Click **Send the invitation**.

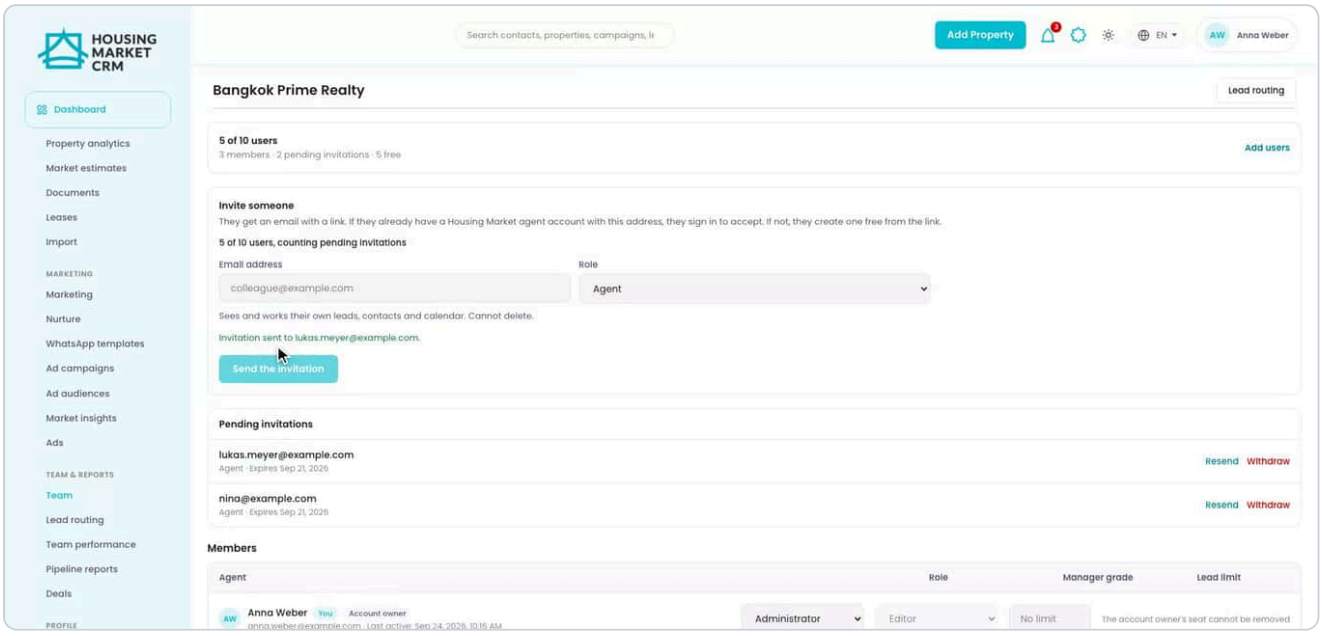


Figure 127.6 · Screen recorded 24 September 2026

7 The invitation waits under **Pending invitations**.

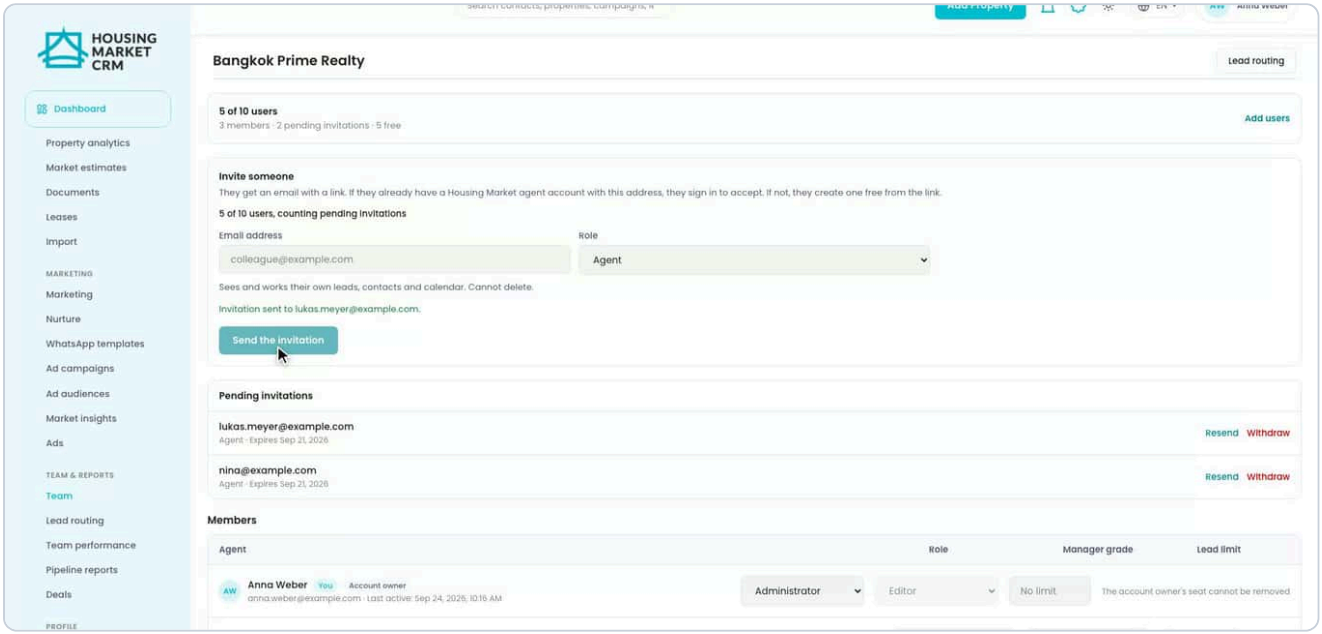


Figure 127.7 · Screen recorded 24 September 2026

8 You can **Resend** or **Withdraw** it.

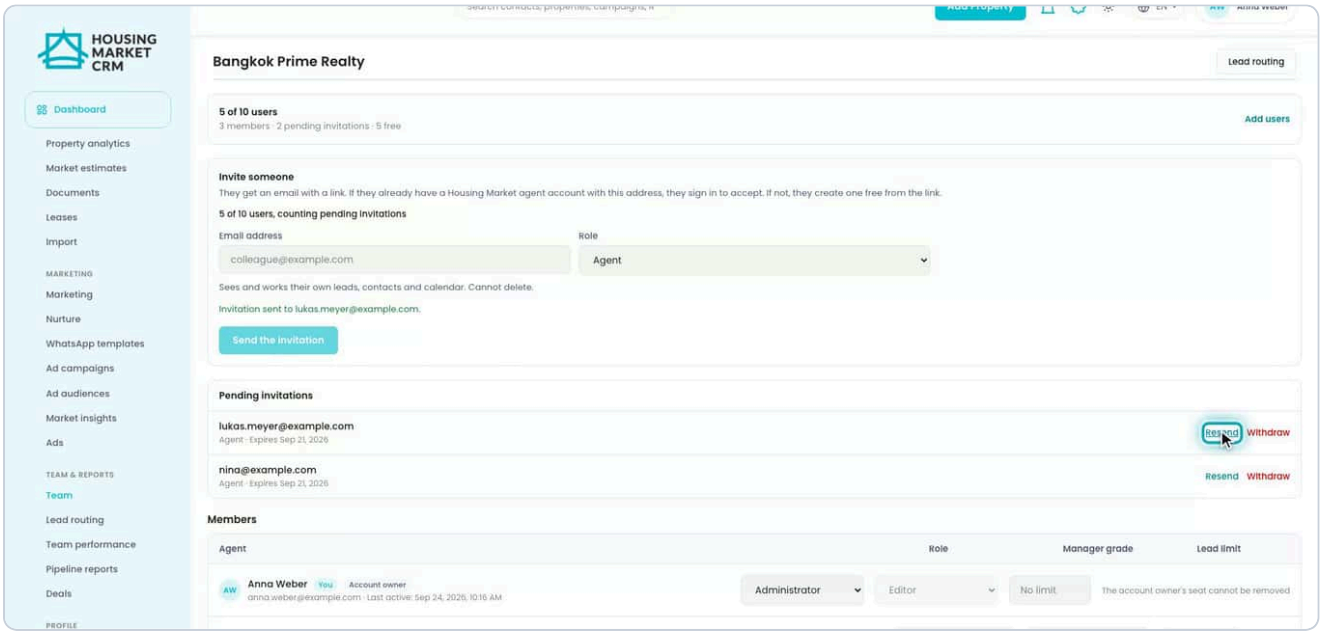


Figure 127.8 · Screen recorded 24 September 2026

9 Accepted invitations appear under **Members**.

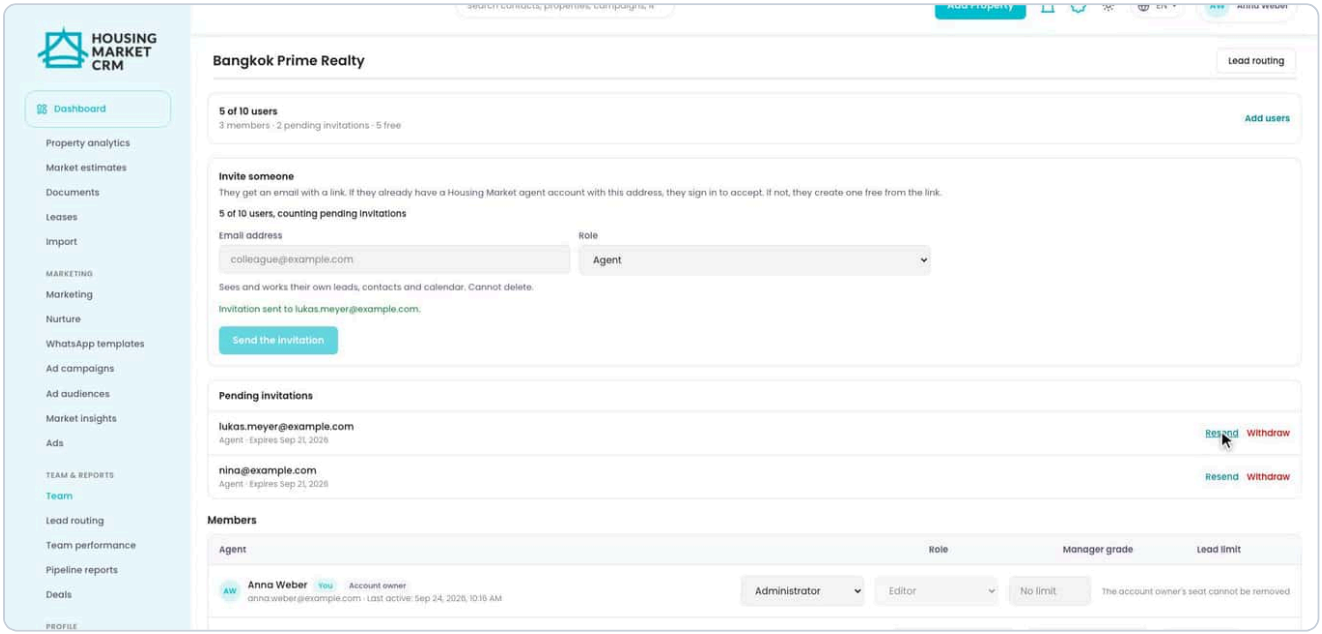


Figure 127.9 · Screen recorded 24 September 2026

RELATED HELP CENTER ARTICLES

How do I upgrade, add users or cancel?	faq.housingmarketgroup.com/faq/how-do-i-upgrade-add-users-or-cancel

128 CHAPTER 128

Set team roles

Business | For admins | Watch the video

TODO Names differ: the video shows the manager grades as Viewer, Editor, Assigner and Remover; the Help Center calls them View only, Edit, Assign and Delete. Align the Help Center with the screen.

OVERVIEW

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STEP BY STEP

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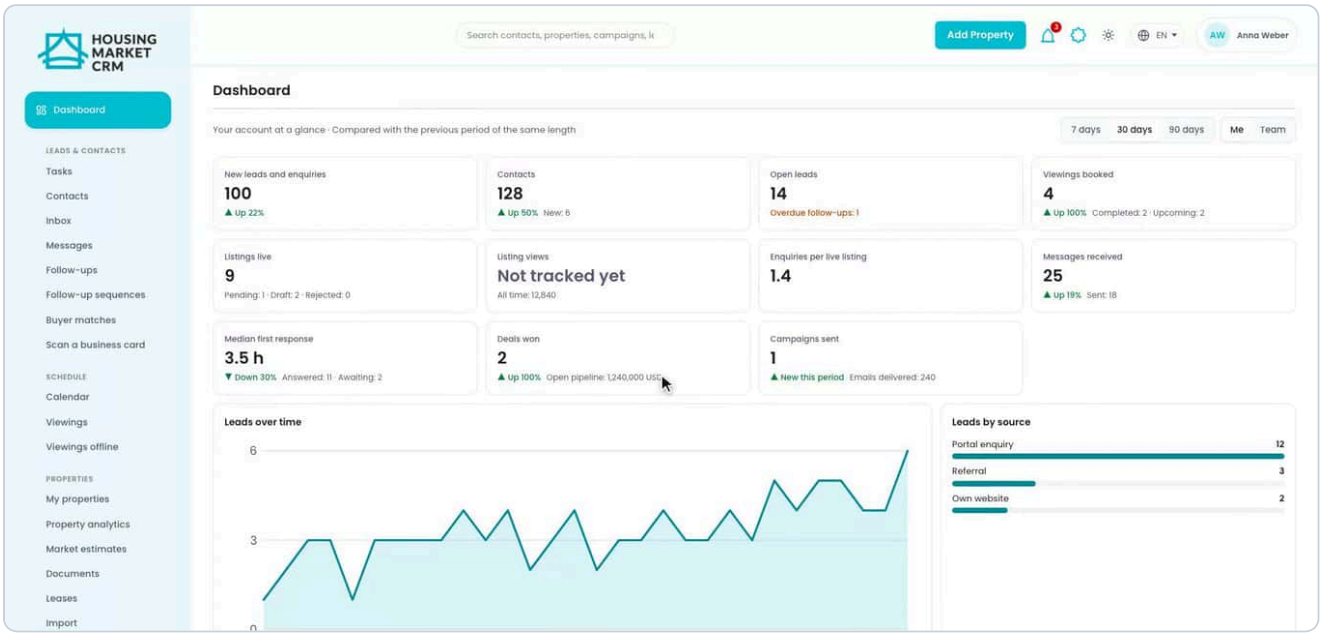


Figure 128.1 · Screen recorded 24 September 2026

2 Click **Team** in the left menu.

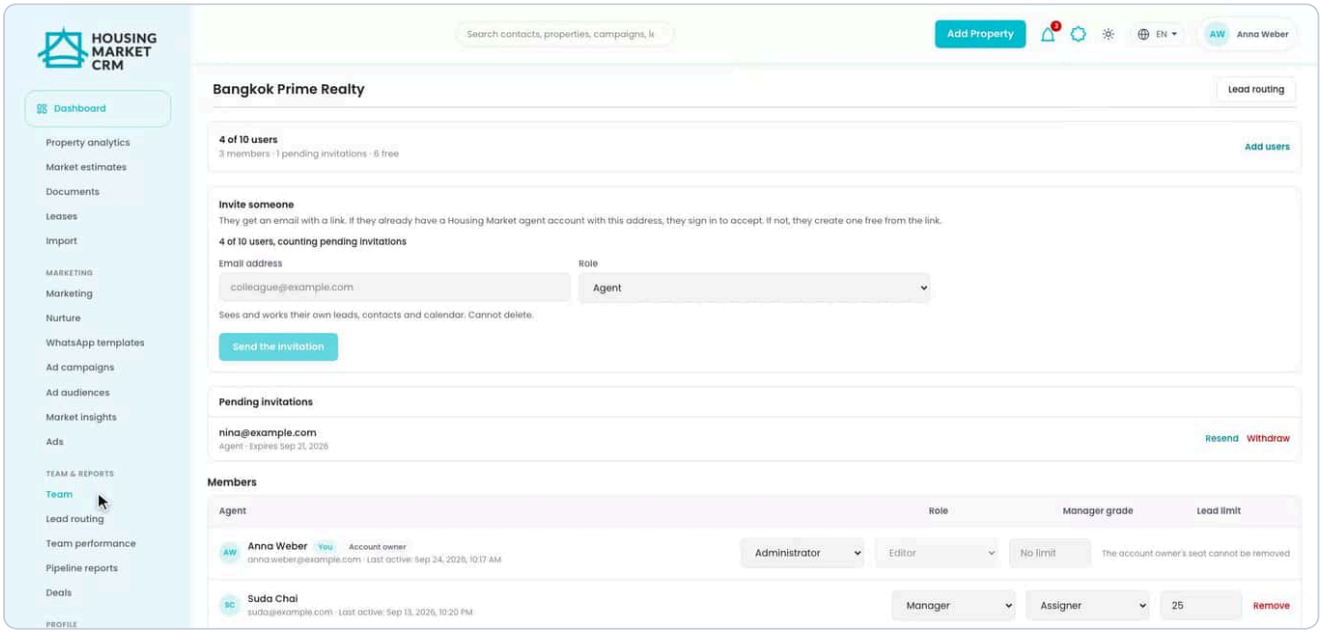


Figure 128.2 · Screen recorded 24 September 2026

3 Scroll to **Members**.

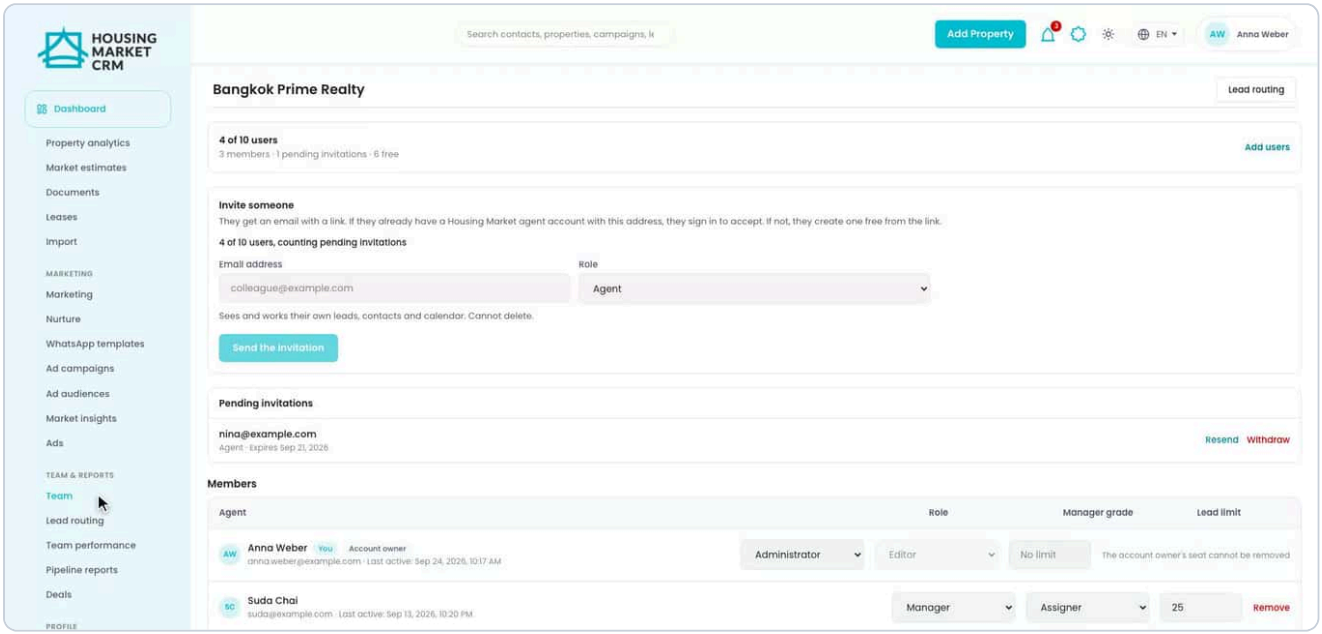


Figure 128.3 · Screen recorded 24 September 2026

4 Pick a **role**: Agent, Manager or Administrator.

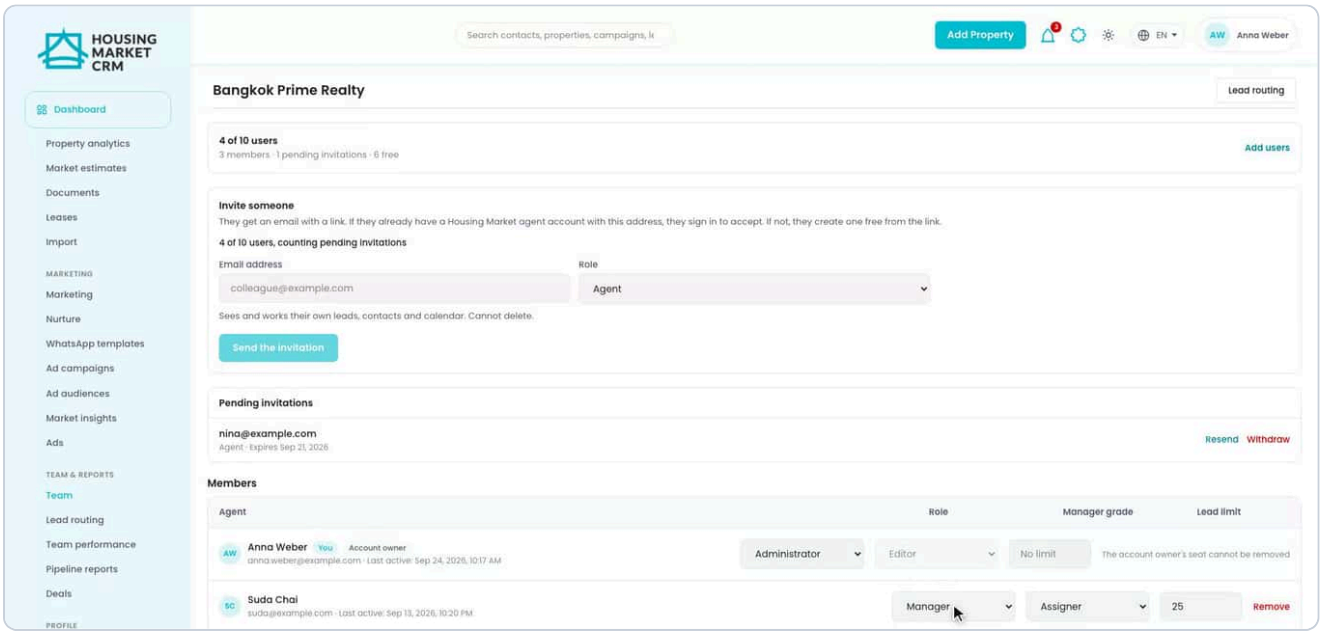


Figure 128.4 · Screen recorded 24 September 2026

5 Managers get a **grade**: Viewer, Editor, Assigner or Remover.

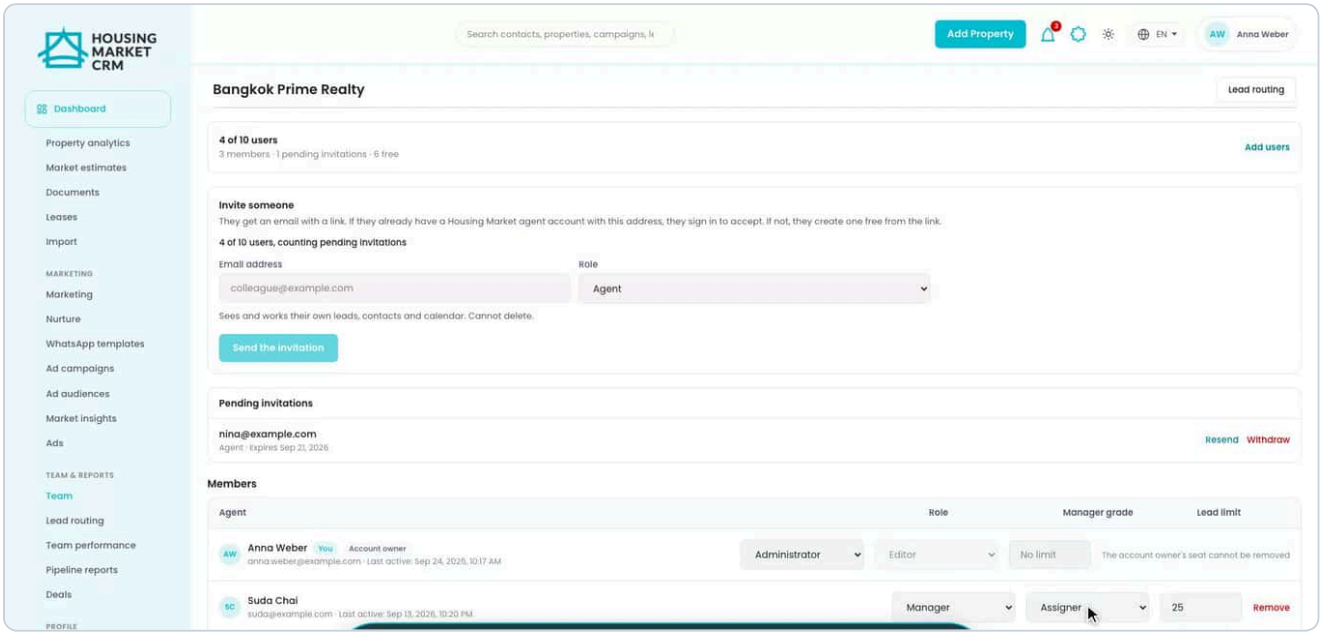


Figure 128.5 · Screen recorded 24 September 2026

6 An **Assigner** can hand leads to agents in the team.

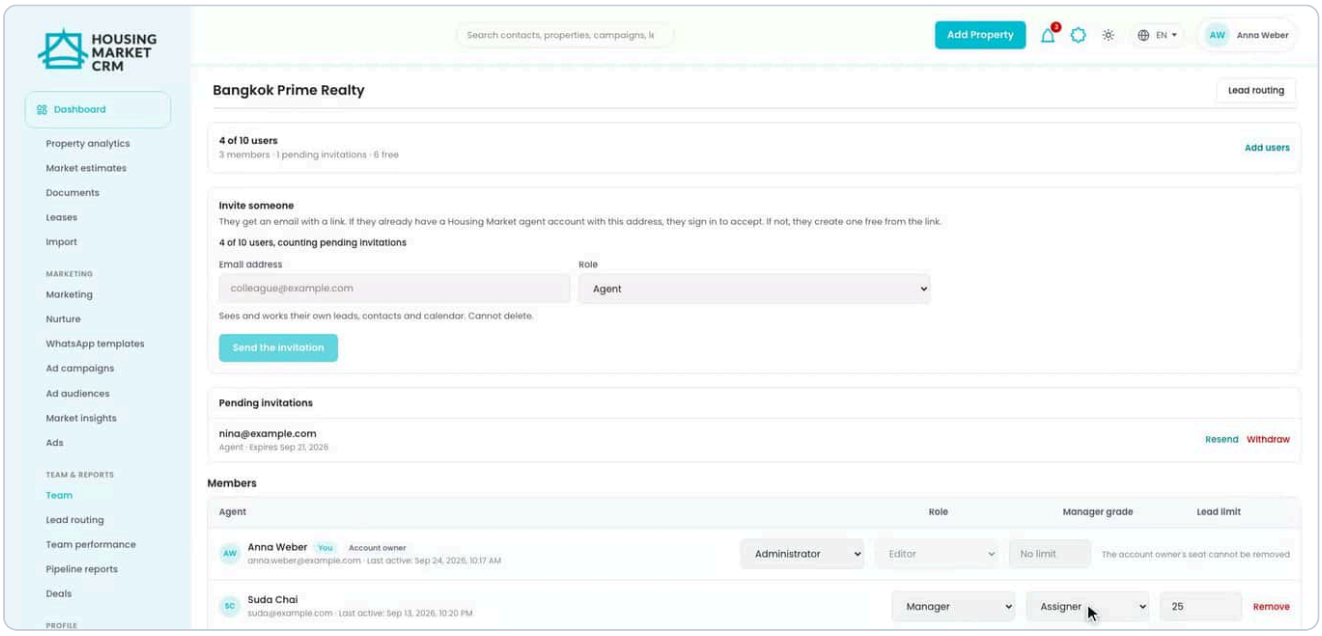


Figure 128.6 · Screen recorded 24 September 2026

7 Set a **lead limit** to avoid overload.

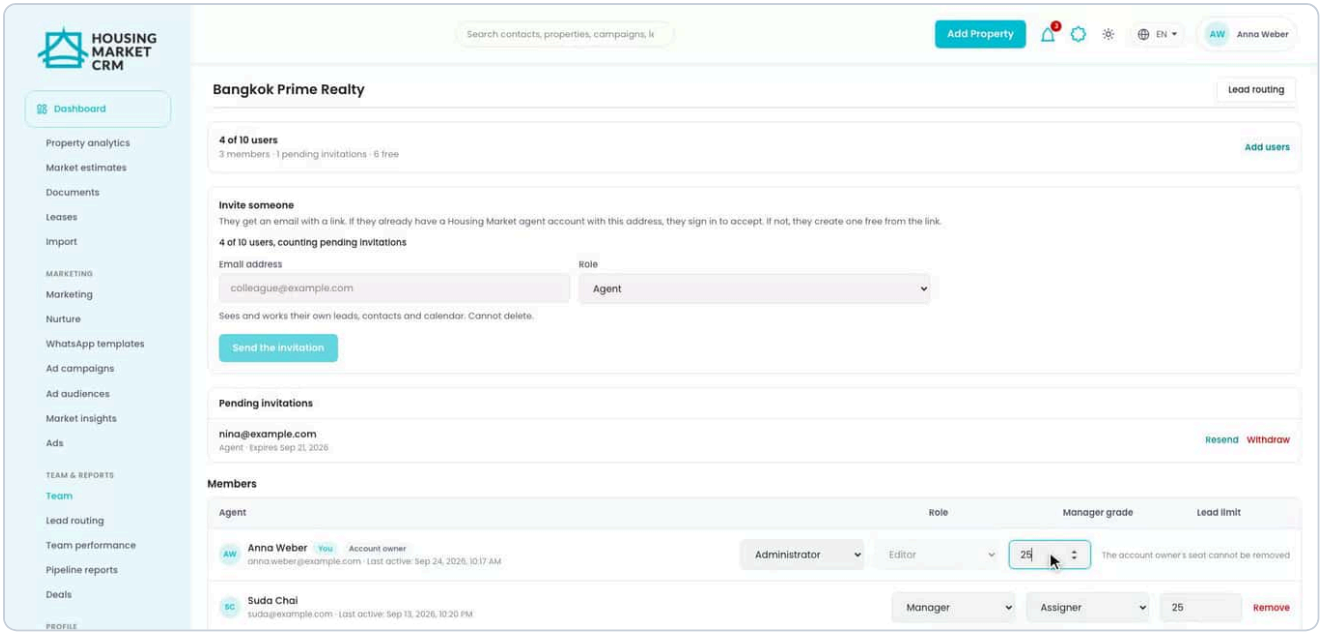


Figure 128.7 · Screen recorded 24 September 2026

8 **Remove** disables the seat — their records stay.

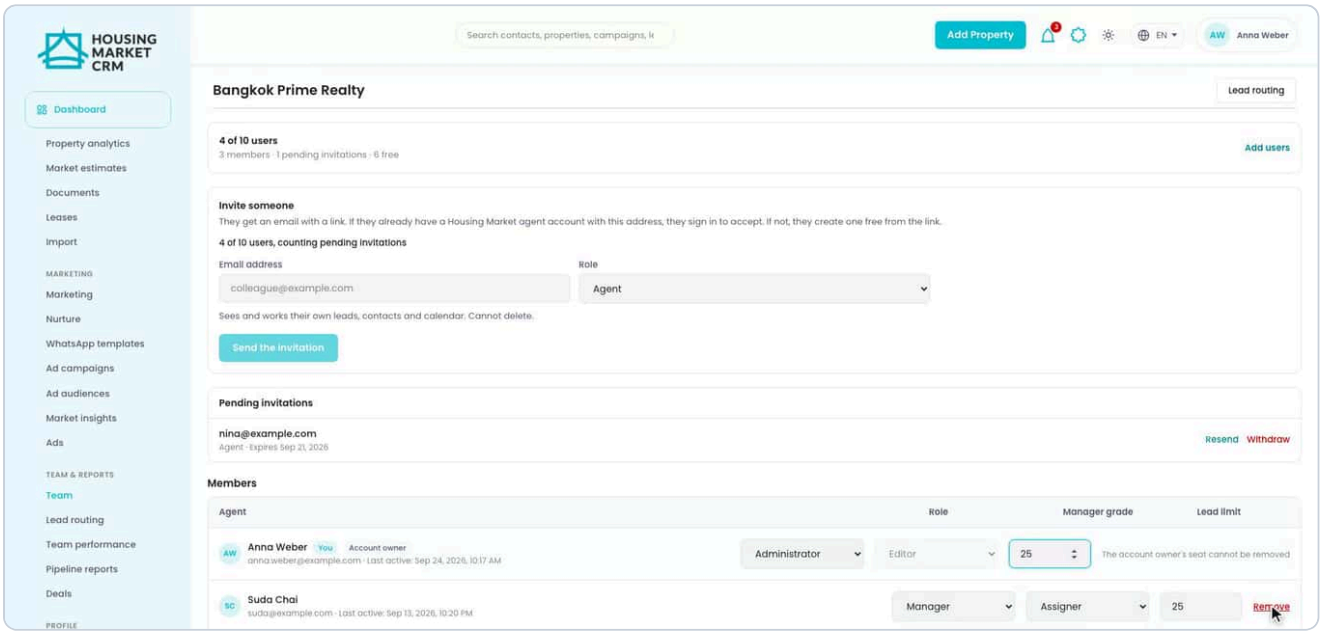


Figure 128.8 · Screen recorded 24 September 2026

129 CHAPTER 129

Assign a lead to an agent

Business | For office managers | Watch the video

OVERVIEW

Yes, on the Business plan: up to 10 users included, then 5 USD per additional user per month, with admin, manager and agent roles, assignment rules, and one view across every agent's board.

Free and Pro are each for 1 user, the account owner. Business includes up to 10 users on one account, and each additional user after that is 5 USD per month. Colleagues join by an email invitation, and each person is an admin, a manager or an agent.

A manager also holds one of four grades, set beside their role under Members on the Team page. The grades build on each other:

- Viewer — reads the whole office and changes nothing
- Editor — reads the office, and creates and edits records in it
- Assigner — everything an Editor may do, plus assigning leads and setting the lead-routing rules
- Remover — everything an Assigner may do, plus deleting records

Lead routing, in the left menu, decides who gets a new enquiry. Rules send a lead to a named agent by area (a city or province), by listing type, by portal listing ID or by portal country ID. They are checked from the top and the first one that matches wins.

A lead that matches no rule follows the setting under When no rule matches: Account owner sends every such lead to the account owner, and is the setting until somebody changes it; In turn gives each agent the next lead in rotation; Least busy gives it to the agent with the fewest open leads. Under Who would get the next lead? you can try a lead's details and see where it would go, without assigning anything.

Each person can also have a lead limit, set under Members on the Team page: the most open leads routing will give them. Leave it empty for no limit, or set 0 for someone on leave. In turn and Least busy skip anyone at their limit; a rule always applies, even when its agent is at their limit; and if everyone is at their limit, the limit gives way rather than leaving the lead with nobody. Only administrators, and managers with the Assigner grade or above, can change lead routing.

A manager can also see every agent's board in one view, and Business carries the team leaderboard, the audit log of who changed what, and commission tracking with splits between agents.

From the Help Center: **Can multiple team members use the CRM?**

STEP BY STEP

1 Open the **lead** you want to hand over.

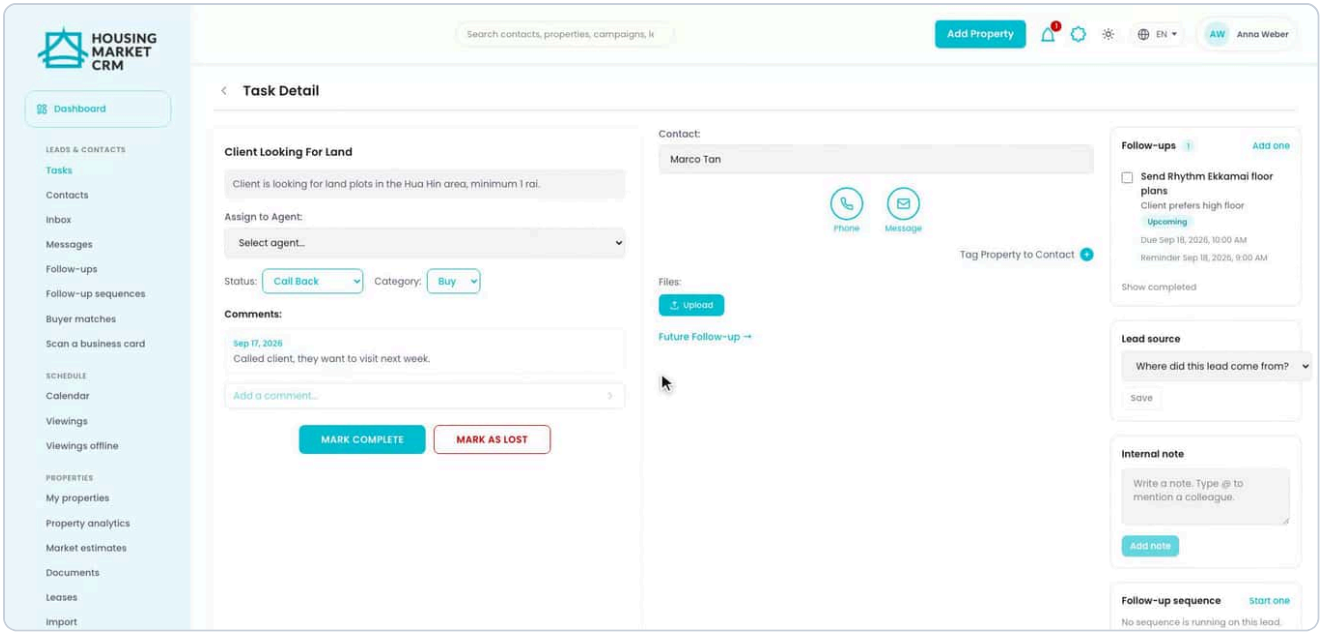


Figure 129.1 · Screen recorded 17 September 2026

2 Pick a colleague under **Assign to Agent**.

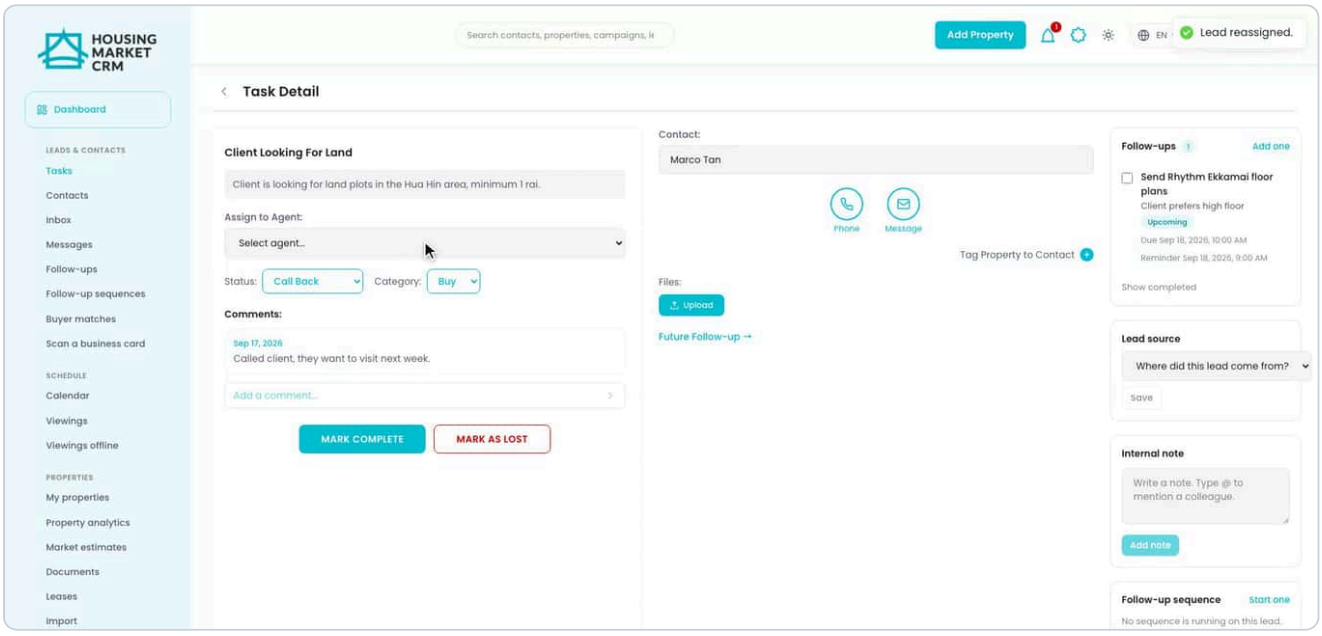


Figure 129.2 · Screen recorded 17 September 2026

3 The lead moves to **Suda's** board and she is notified.

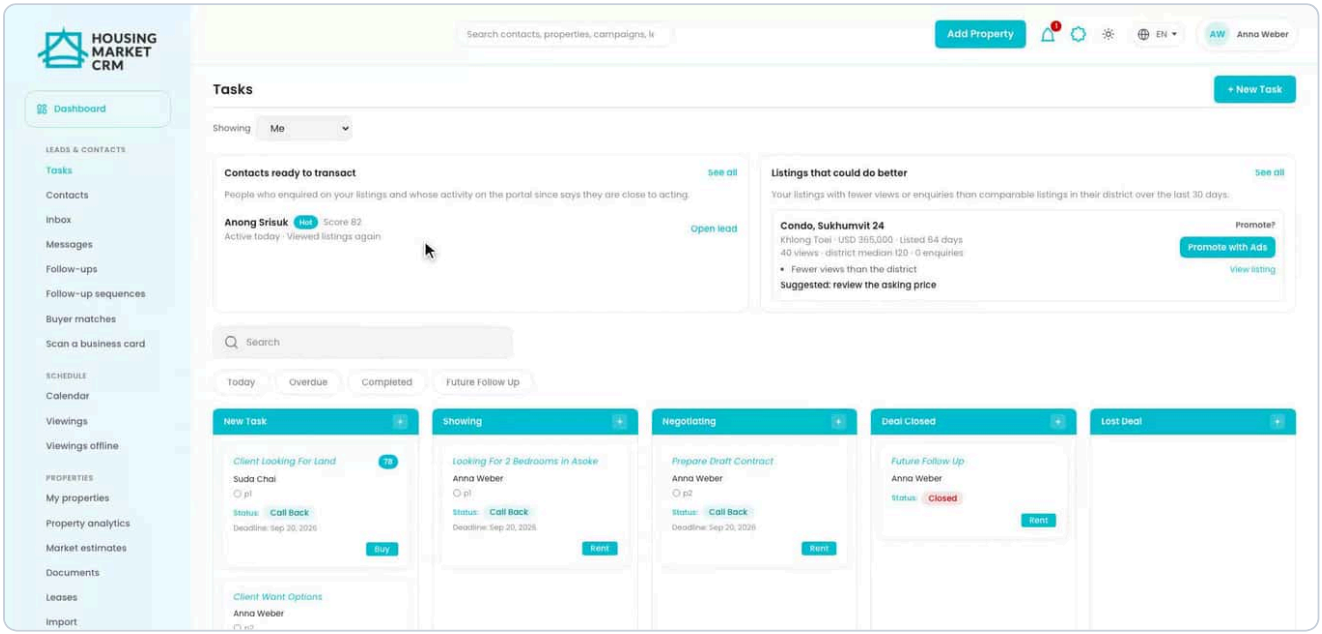


Figure 129.3 · Screen recorded 17 September 2026

4 Back on **Tasks** switch **Showing** to **Whole team**.

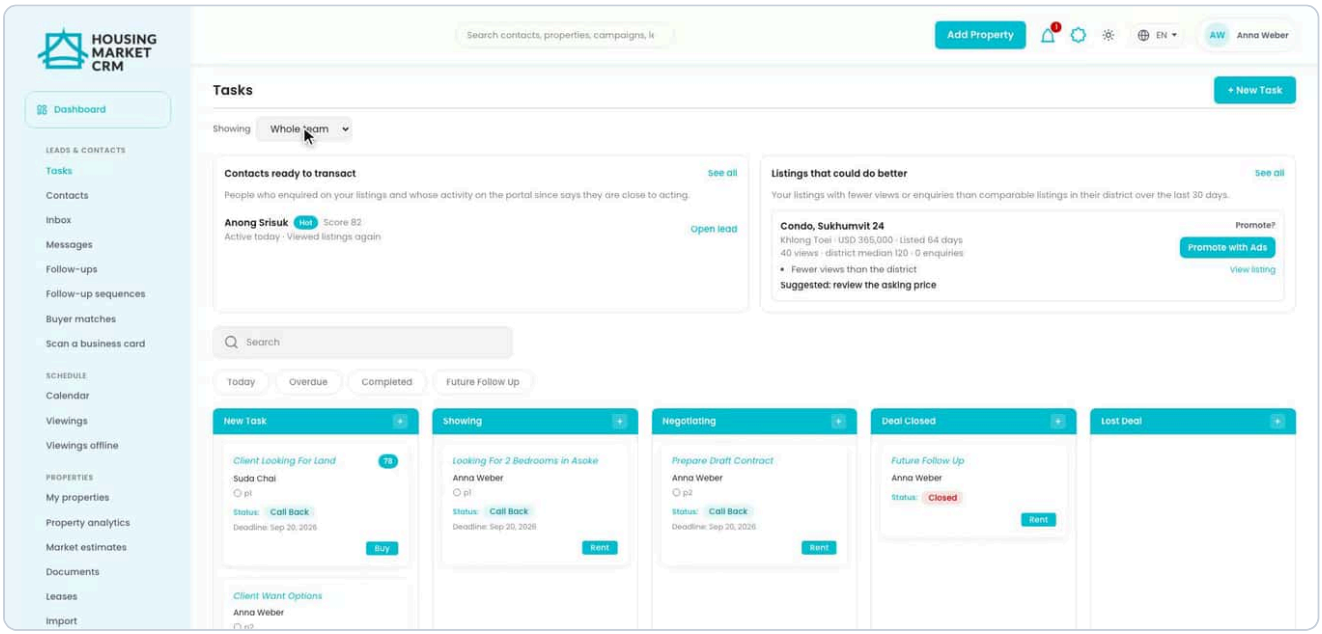


Figure 129.4 · Screen recorded 17 September 2026

5 Or pick **one agent** to see their leads.

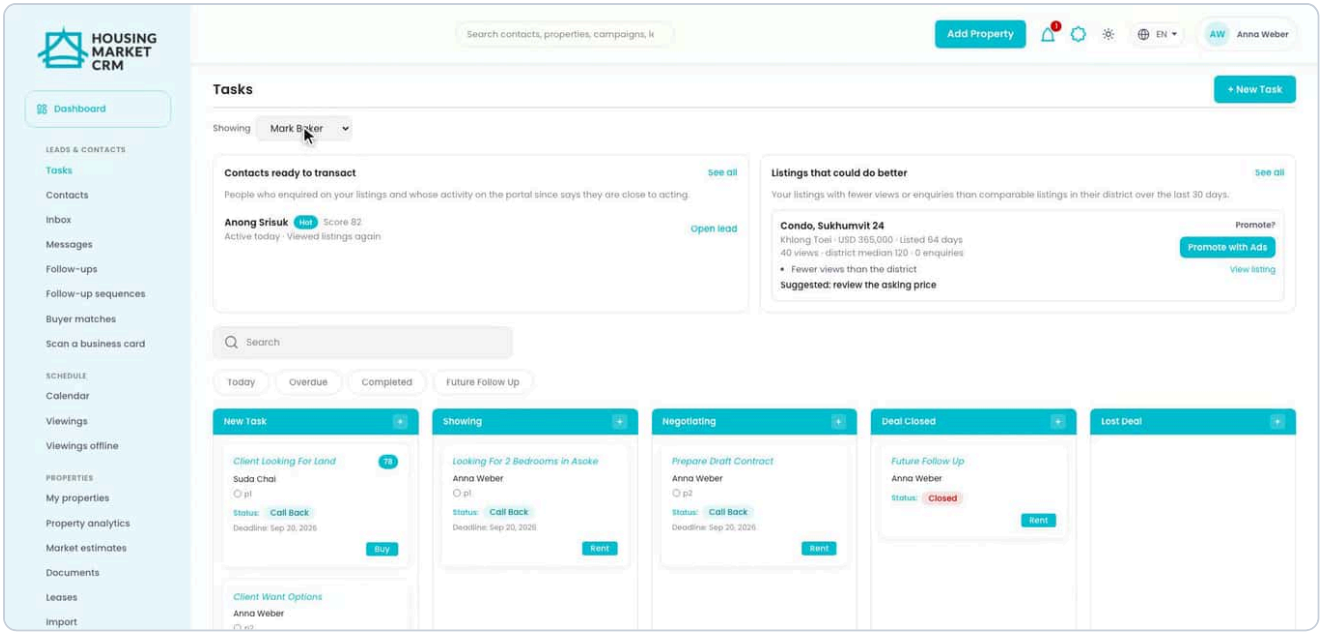


Figure 129.5 · Screen recorded 17 September 2026

6 To assign new enquiries automatically, use **Lead routing**.

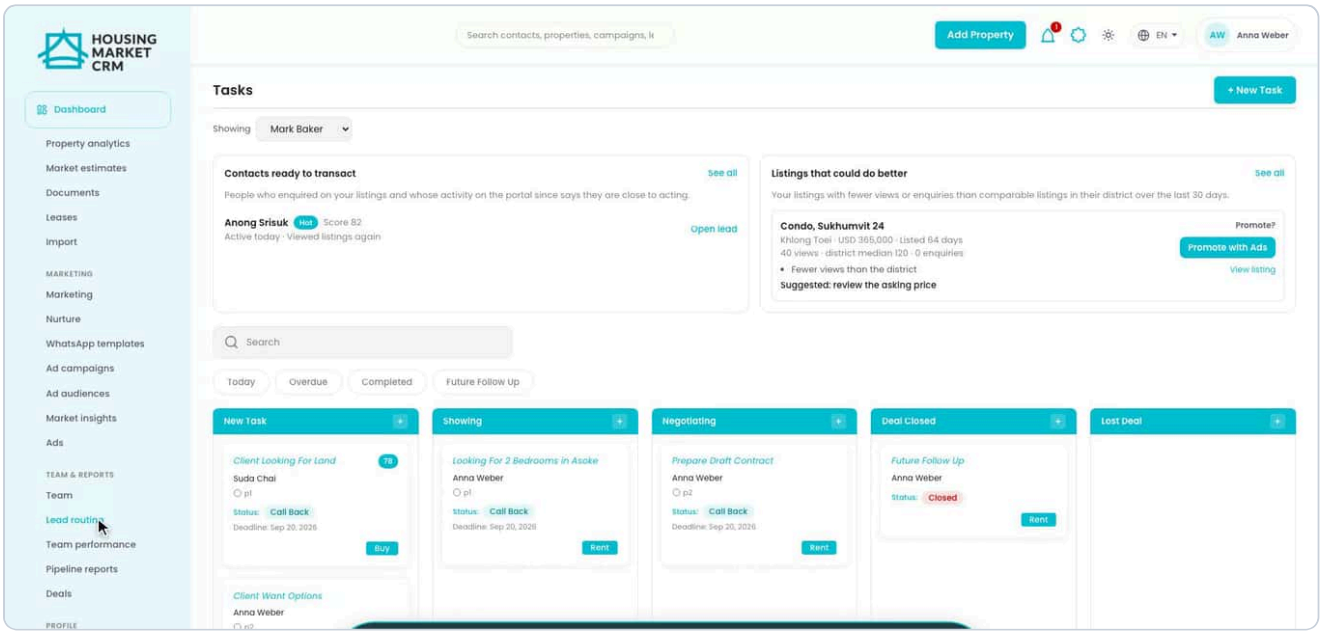


Figure 129.6 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

What do team leaderboards and the weekly owner email show?	faq.housingmarketgroup.com/faq/what-do-team-leaderboards-and-the-weekly-owner-email-show

130 CHAPTER 130

Lead routing

Business | For office managers | Watch the video

TODO The Help Center says unmatched leads "go round the team in turn" and explains why sharing by fewest leads was rejected; the video (2026-09-17) picks a fallback called "Least busy". Check the current screen and correct whichever is wrong.

OVERVIEW

Yes, on the Business plan: up to 10 users included, then 5 USD per additional user per month, with admin, manager and agent roles, assignment rules, and one view across every agent's board.

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From the Help Center: **Can multiple team members use the CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

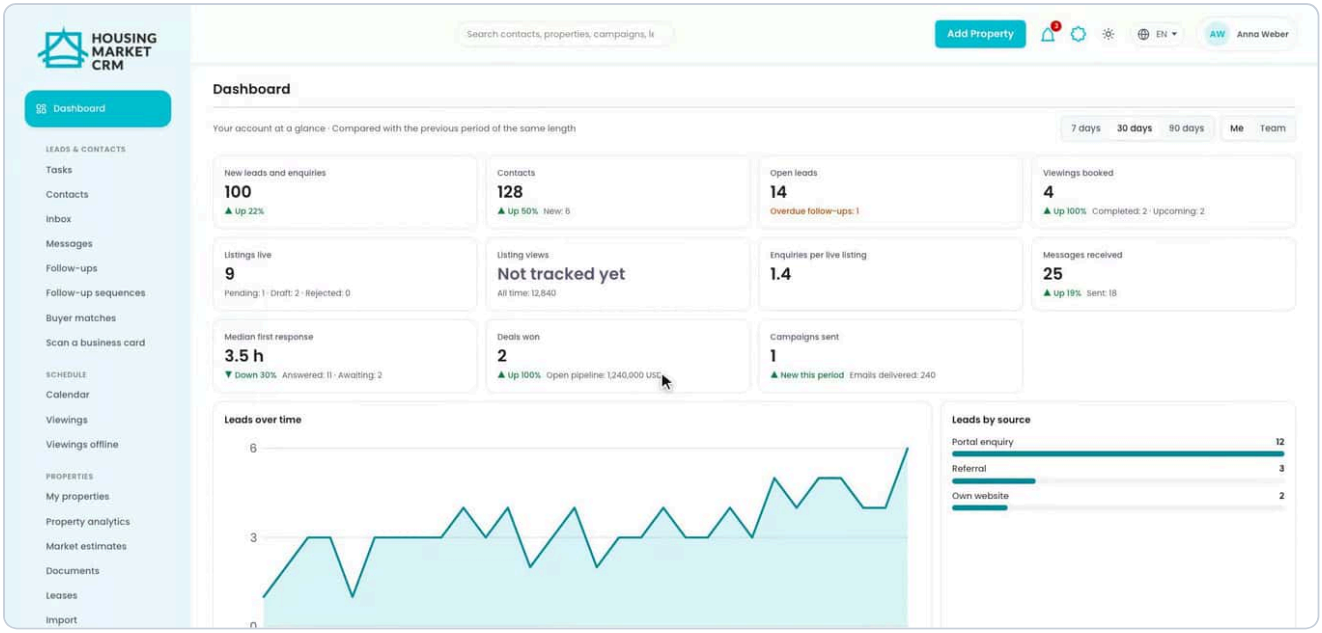


Figure 130.1 · Screen recorded 17 September 2026

2 Click **Lead routing** in the left menu.

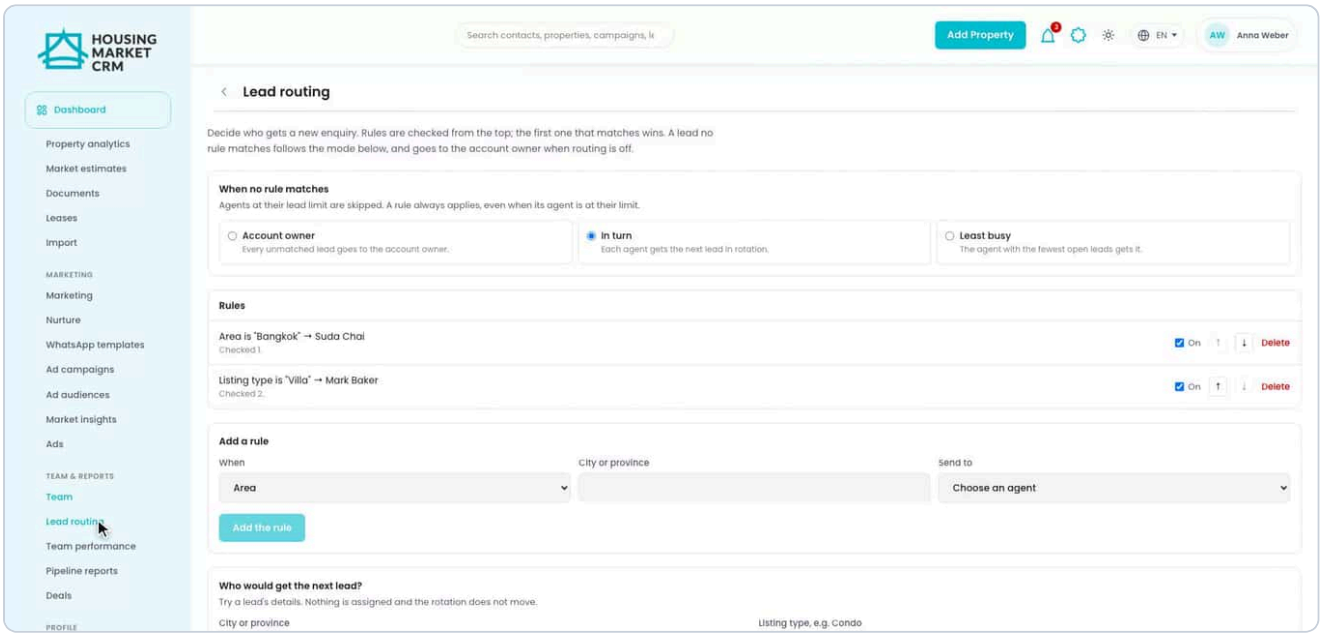


Figure 130.2 · Screen recorded 17 September 2026

3 Choose the fallback — e.g. **Least busy**.

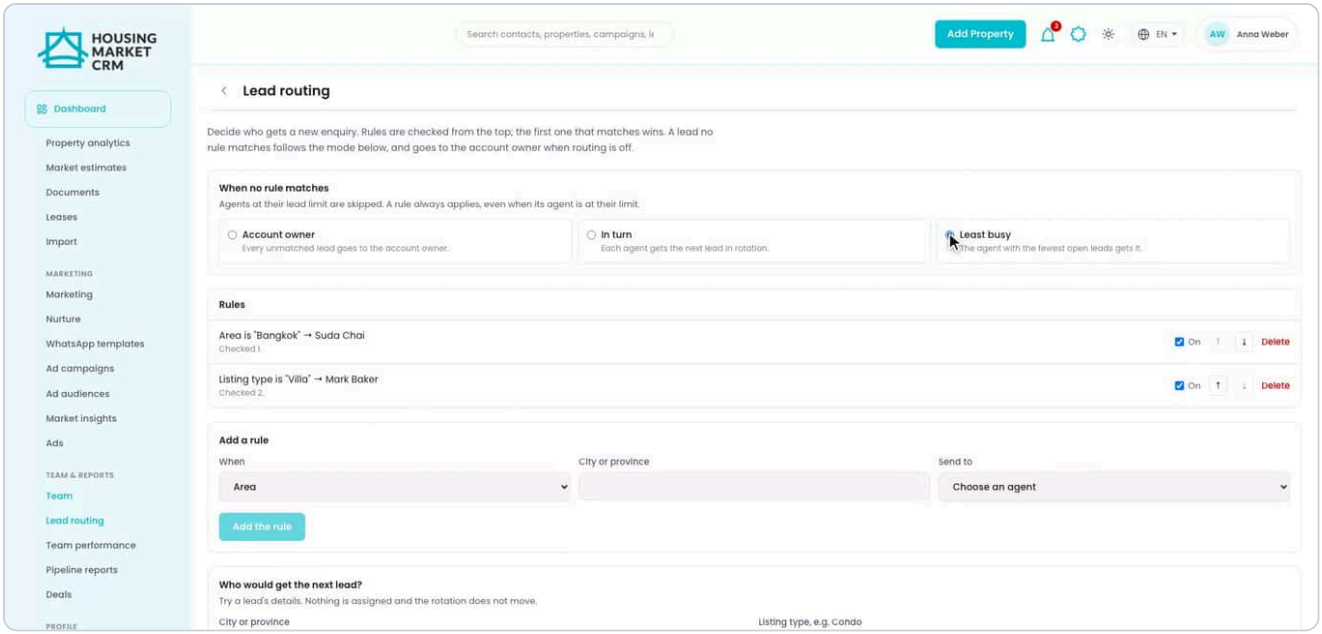


Figure 130.3 · Screen recorded 17 September 2026

4 Rules are checked **from the top**; the first match wins.

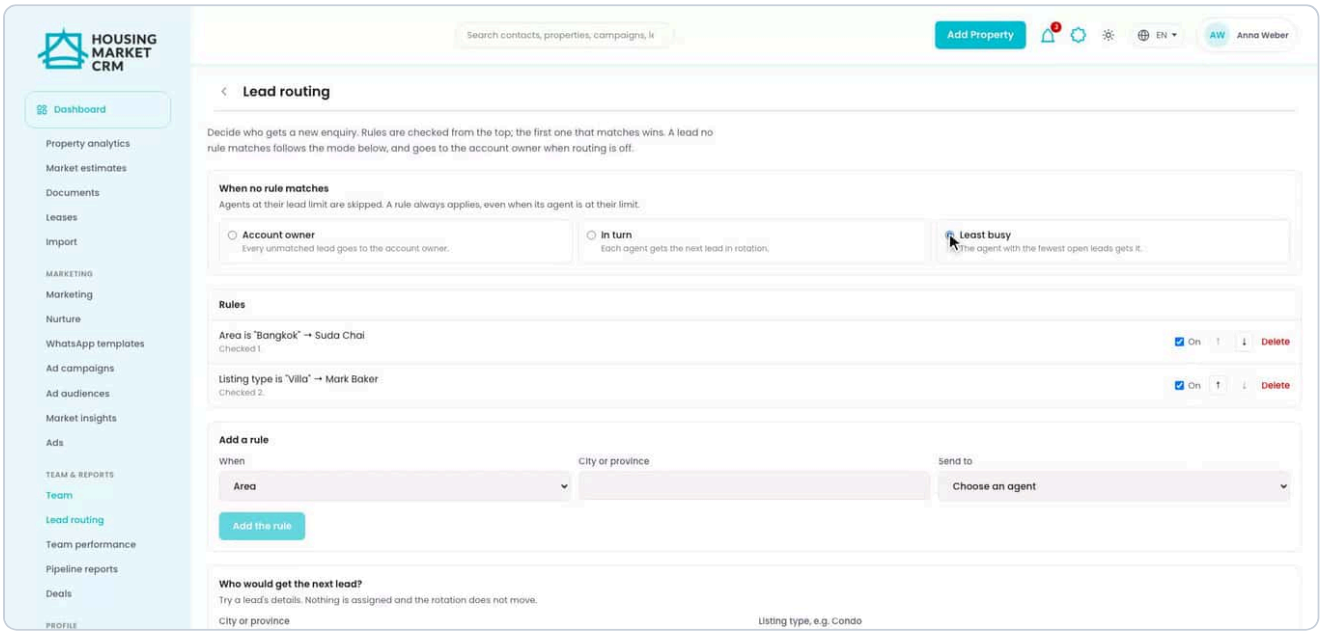


Figure 130.4 · Screen recorded 17 September 2026

5 Use the arrows to **reorder** rules.

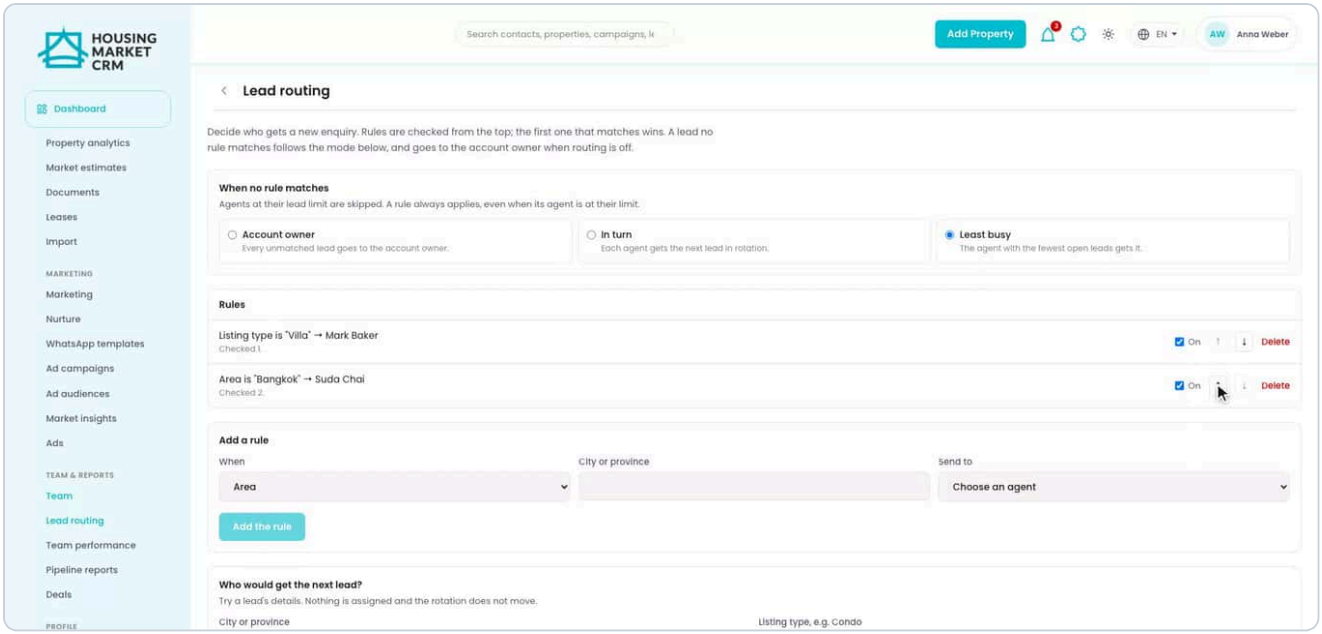


Figure 130.5 · Screen recorded 17 September 2026

6 Under **Add a rule** pick what to match, e.g. **Area**.

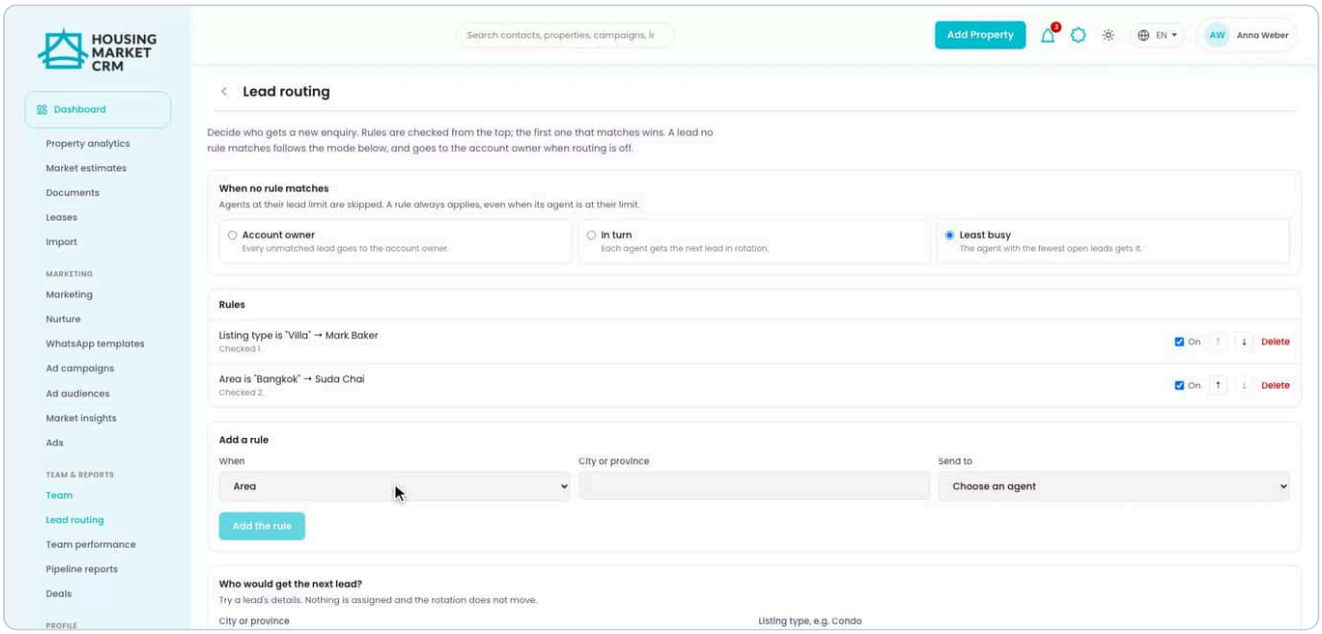


Figure 130.6 · Screen recorded 17 September 2026

7 enter the **city or province** and choose the **agent**.

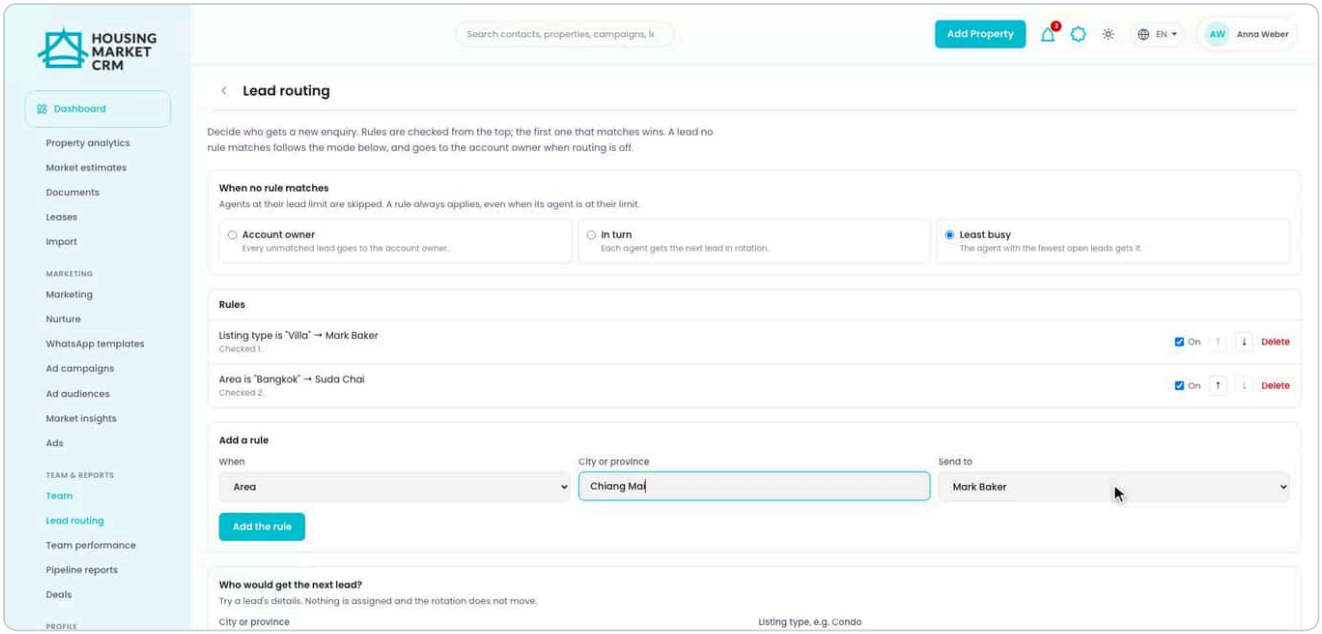


Figure 130.7 · Screen recorded 17 September 2026

8 Click **Add the rule**.

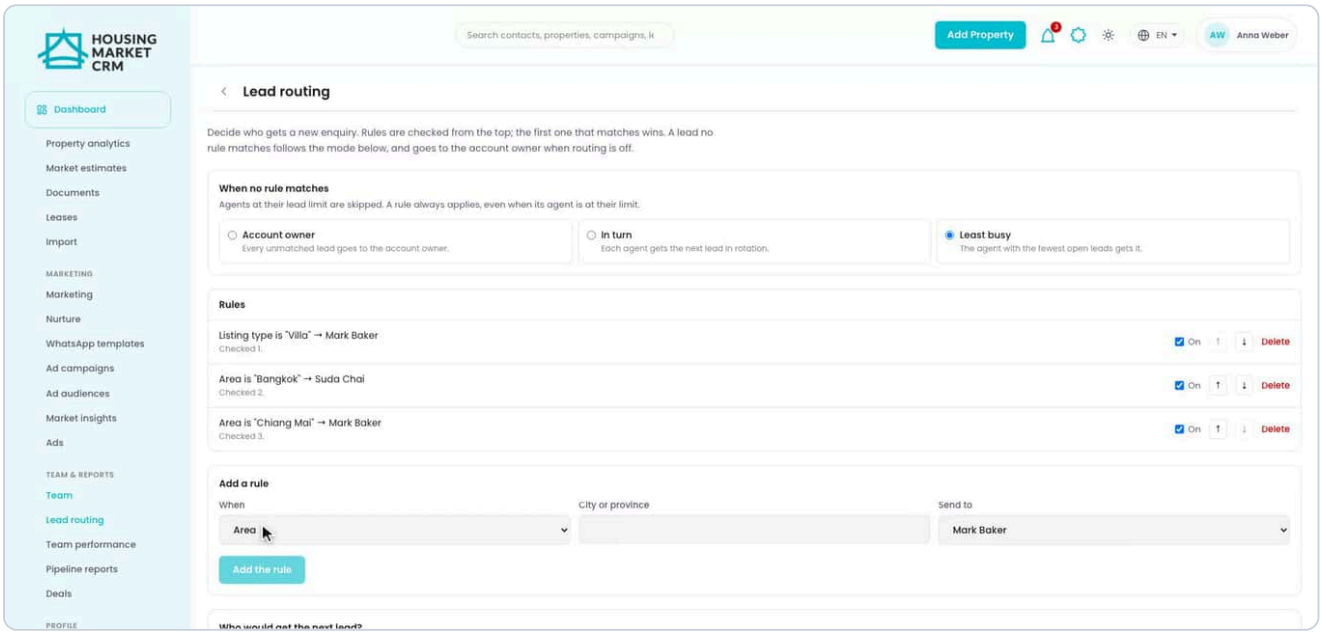


Figure 130.8 · Screen recorded 17 September 2026

9 Check **who would get the next lead**.

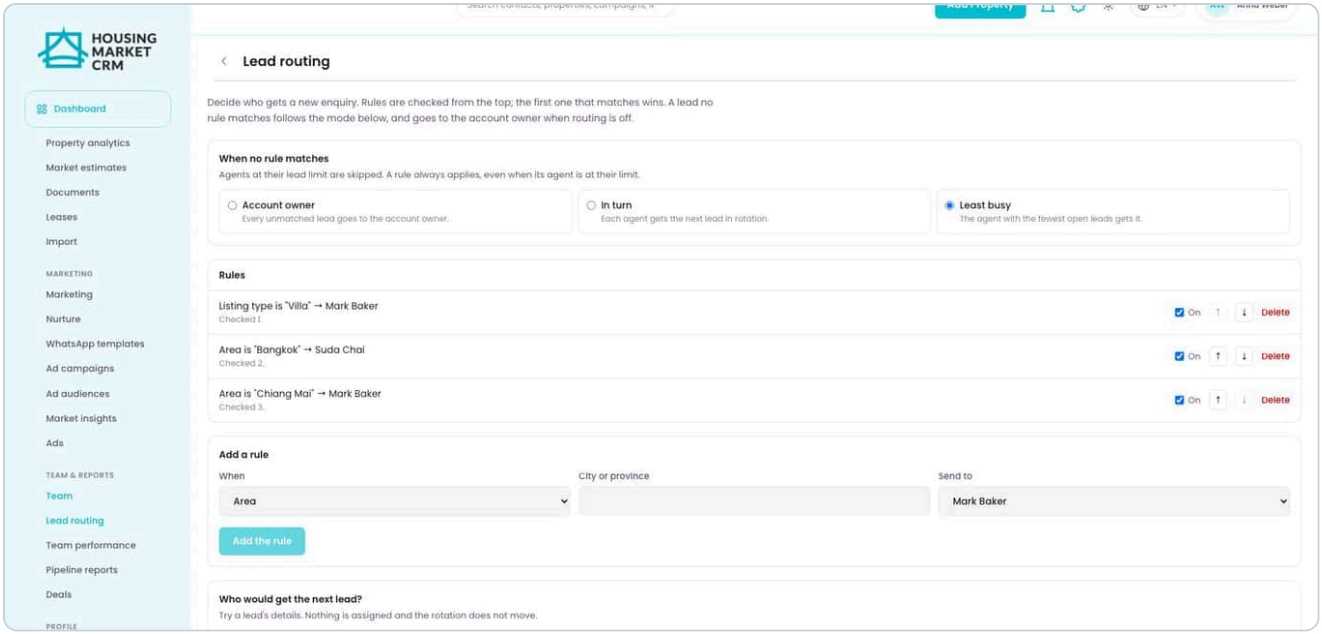


Figure 130.9 · Screen recorded 17 September 2026

10 Click **Check**.

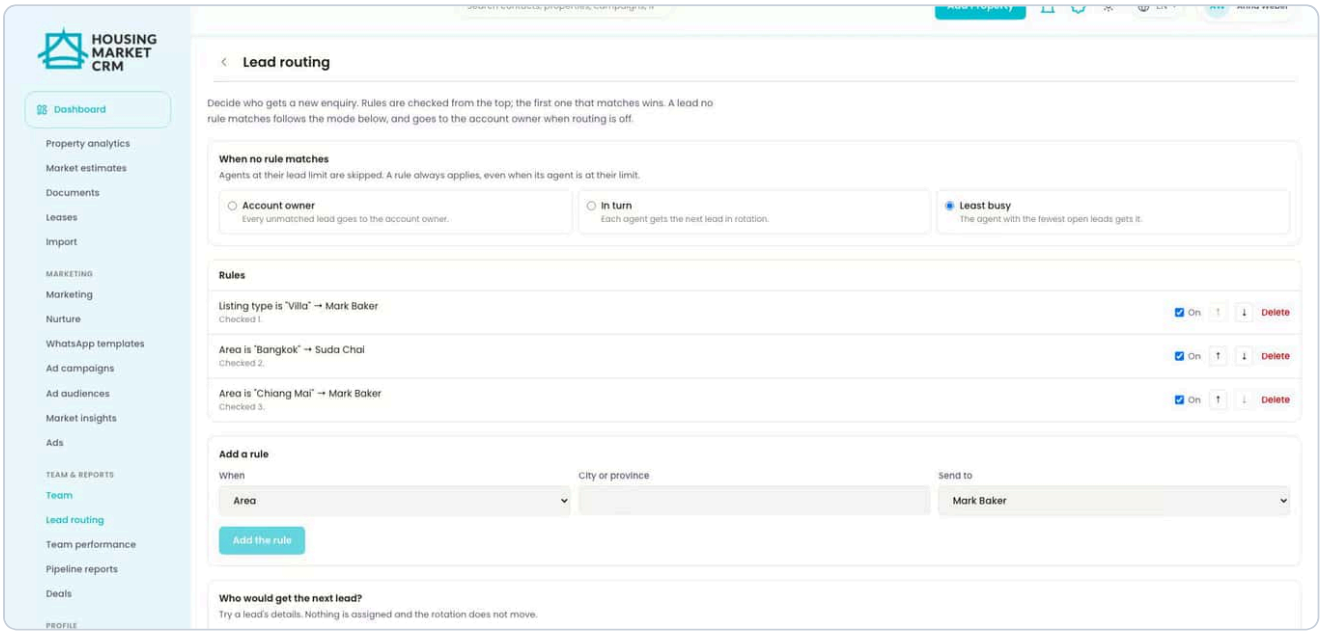


Figure 130.10 · Screen recorded 17 September 2026

131 CHAPTER 131

The team leaderboard

Business | For office managers | Watch the video

OVERVIEW

On Business, the leaderboard ranks each agent on leads, response time, conversion and deals closed, and the owner gets the week's summary by email every Monday morning.

Both are Business features, because both are about managing other people.

The team leaderboard

Pick a period and each agent gets a row: the leads they received, their median first response time, how many of those leads converted, and the deals they closed. Every figure on a row is measured over the same set of leads — the ones created in the period — so a note typed on an old lead today cannot move this month's numbers.

The weekly owner email

Every Monday morning, in the account owner's own time zone, the owner receives a summary of the previous week:

- Leads in, including any still unassigned
- The office's median first response, and how many leads are still waiting for one
- Deals closed during the week
- Who is lagging — an agent whose responses are slow, or who has leads left unanswered
- A table per agent, and a link to the full report

The owner can switch the email off in notification settings.

From the Help Center: **What do team leaderboards and the weekly owner email show?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

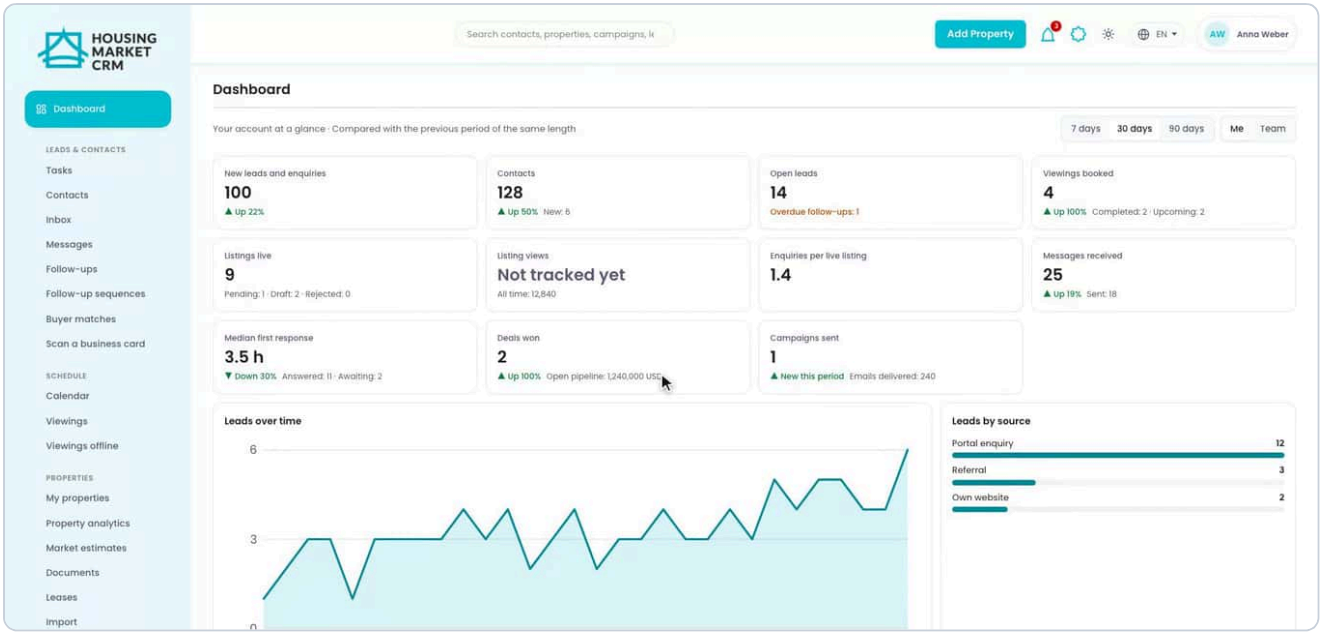


Figure 131.1 · Screen recorded 17 September 2026

2 Click **Team performance** in the left menu.

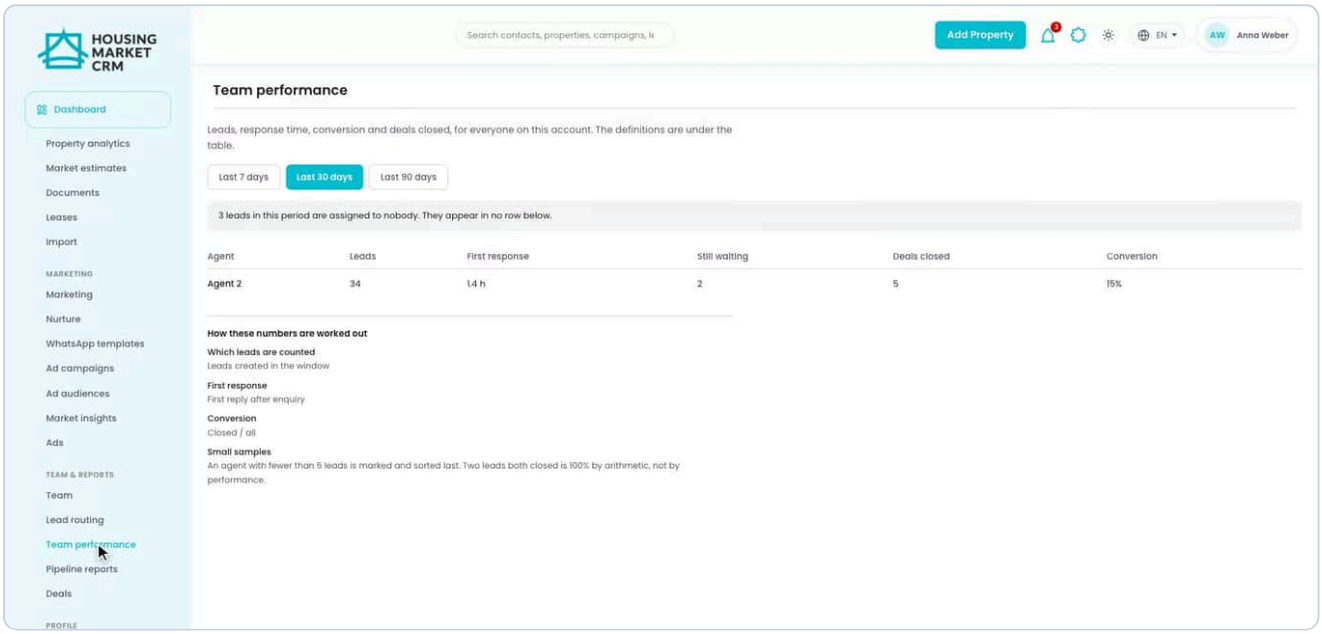


Figure 131.2 · Screen recorded 17 September 2026

3 Pick 7, 30 or 90 days.

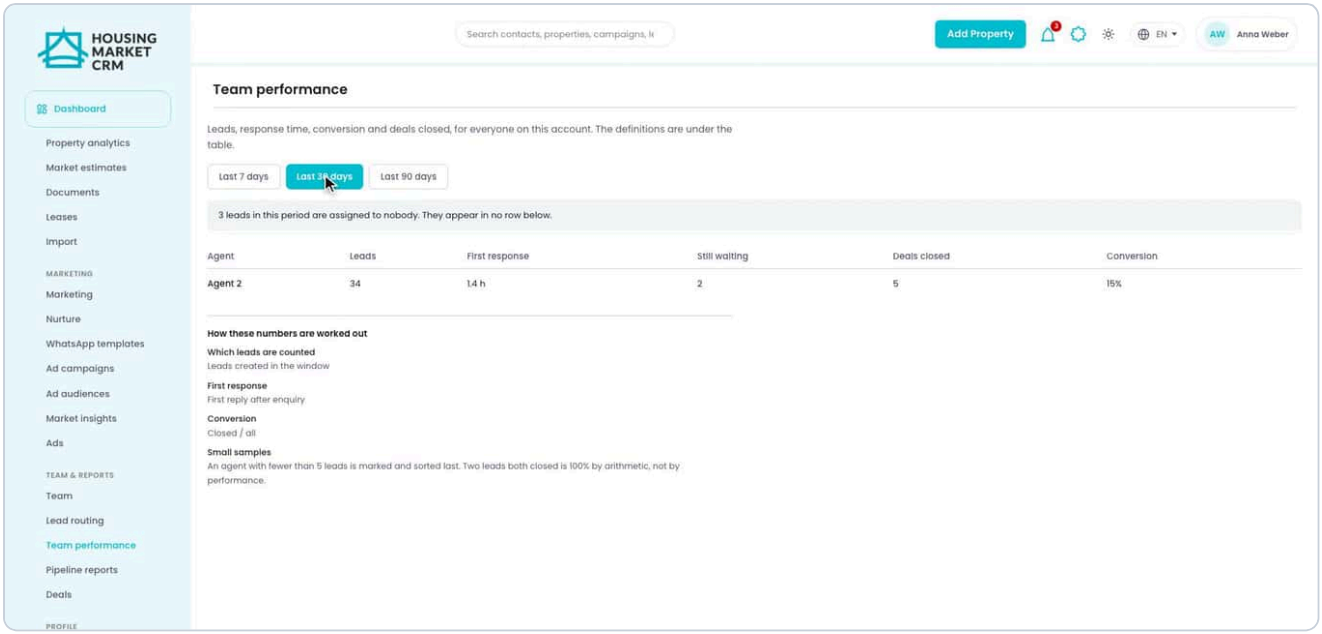


Figure 131.3 · Screen recorded 17 September 2026

4 Compare leads, first response and leads still waiting and deals closed and conversion.

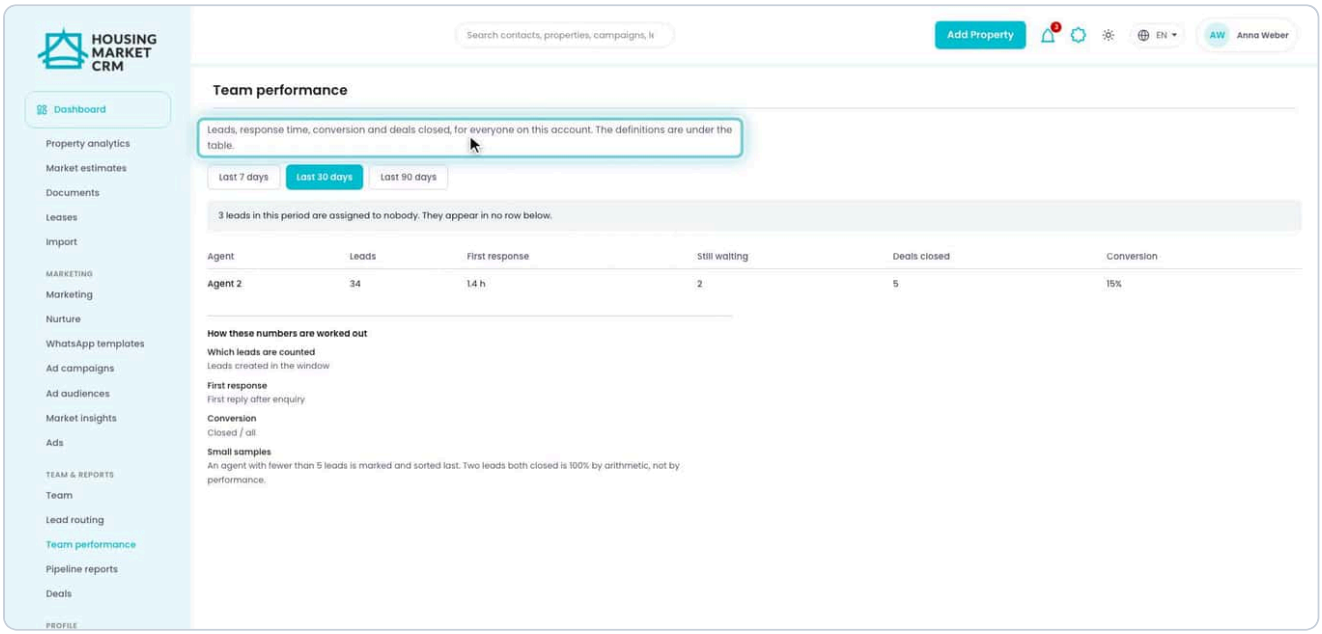


Figure 131.4 · Screen recorded 17 September 2026

5 The **definitions** explain every figure.

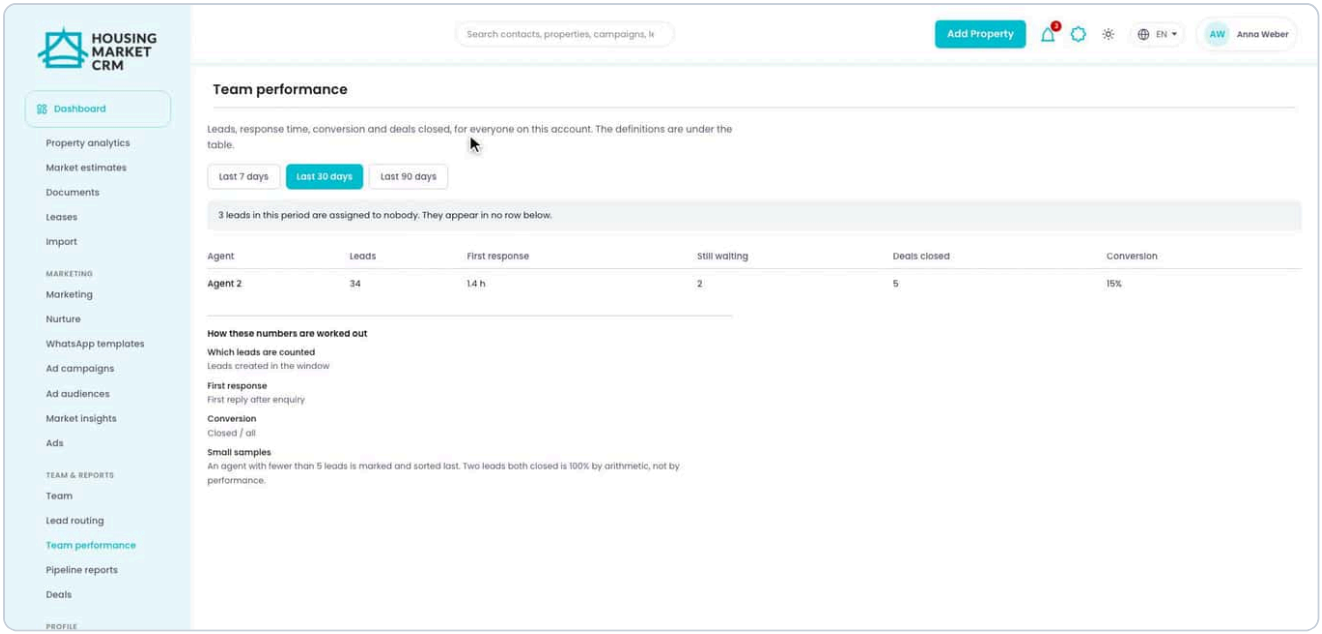


Figure 131.5 · Screen recorded 17 September 2026

132 CHAPTER 132

Your weekly stats email

All plans | For agents | Watch the video

OVERVIEW

Once a week the CRM emails you your property views, new leads, pending leads and leads waiting for a reply for the last seven days. Switch it off under Weekly CRM statistics in Settings, Notifications.

Every CRM account holder with a verified email address gets a short email once a week, called Your week in Housing Market CRM. The figures are the ones your dashboard shows for the last seven days, so the email and the screen it links to cannot disagree. The button, Open your dashboard, takes you to the CRM.

- Property views in the last seven days.
- New leads, with the number for the seven days before for comparison.
- Pending leads, which are the leads still open in your pipeline.
- Leads waiting for a reply and your median first response time, if your plan includes response figures.
- For an office administrator or manager on a plan with team reporting, a Team performance table with the same figures for each agent you manage.

The email arrives during working hours in your portal's time zone (from 08:00 until 18:00), starting on Monday. It is sent once a week at most, and a week with nothing in it is skipped. It is written in the language you chose under Settings, Notifications, which is English until you choose another.

It is a separate email from the weekly report about your portal listings and from the weekly owner email of the Business plan, so you can receive more than one.

To stop it, open Settings, Notifications and turn off the email for Weekly CRM statistics. Every email also carries the one-click unsubscribe of your mail app, which switches off the same setting.

From the Help Center: **What is the weekly CRM statistics email?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

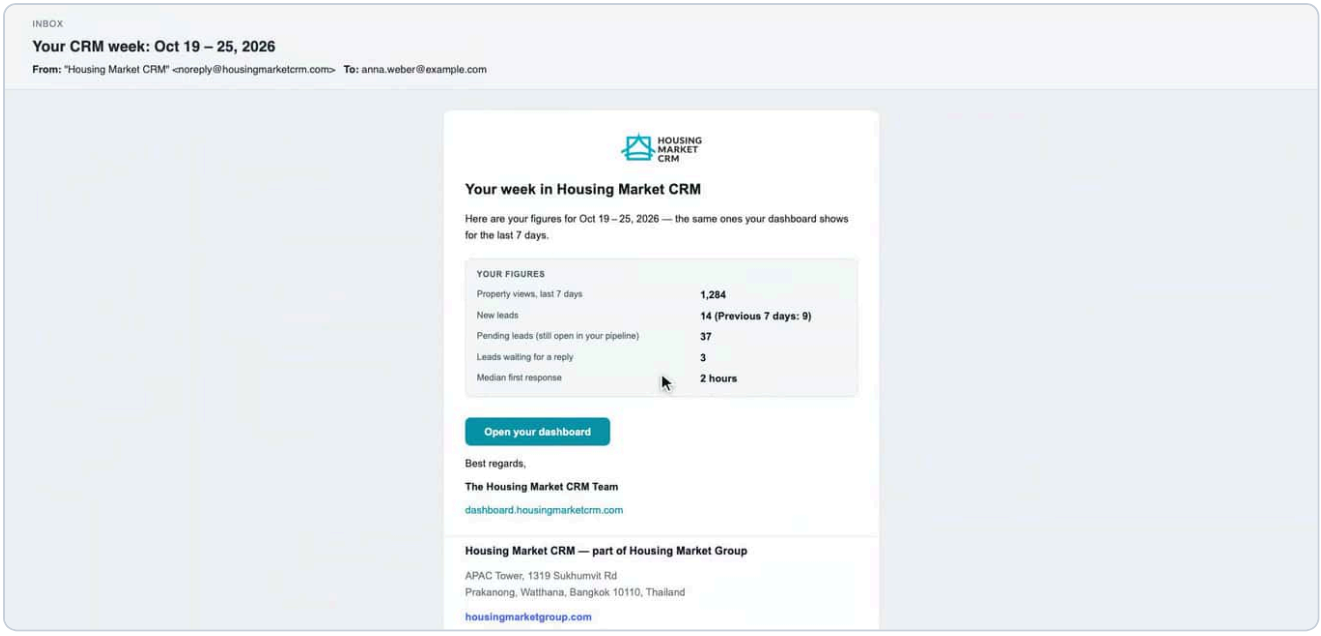


Figure 132.1 · Screen recorded 29 October 2026

2 Once a week you get **one email** with your own week.

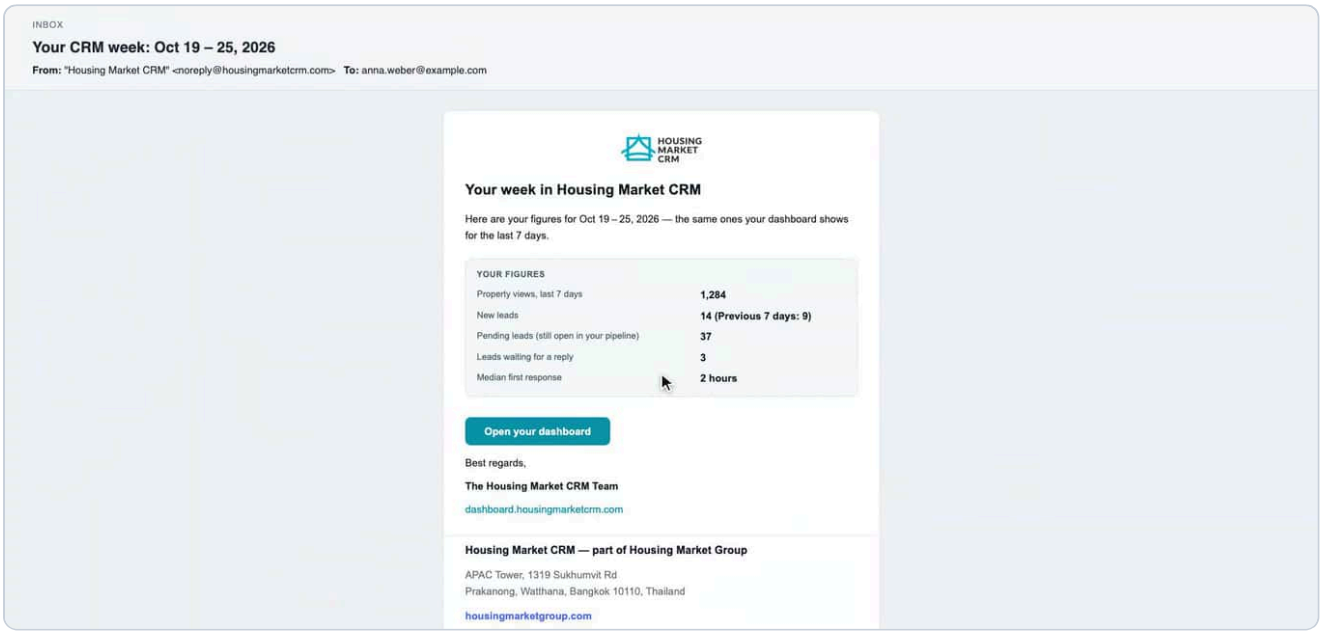


Figure 132.2 · Screen recorded 29 October 2026

3 The subject names **the seven days** it covers.

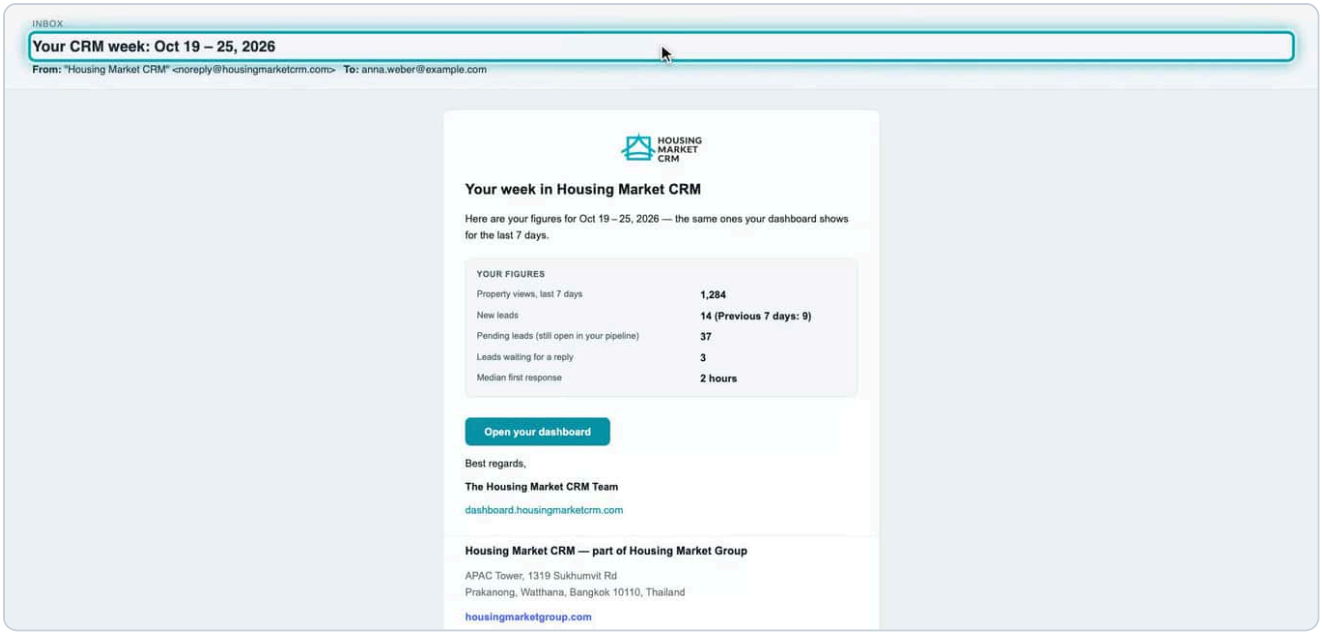


Figure 132.3 · Screen recorded 29 October 2026

4 **Your figures**: the same ones your dashboard shows for the last 7 days.

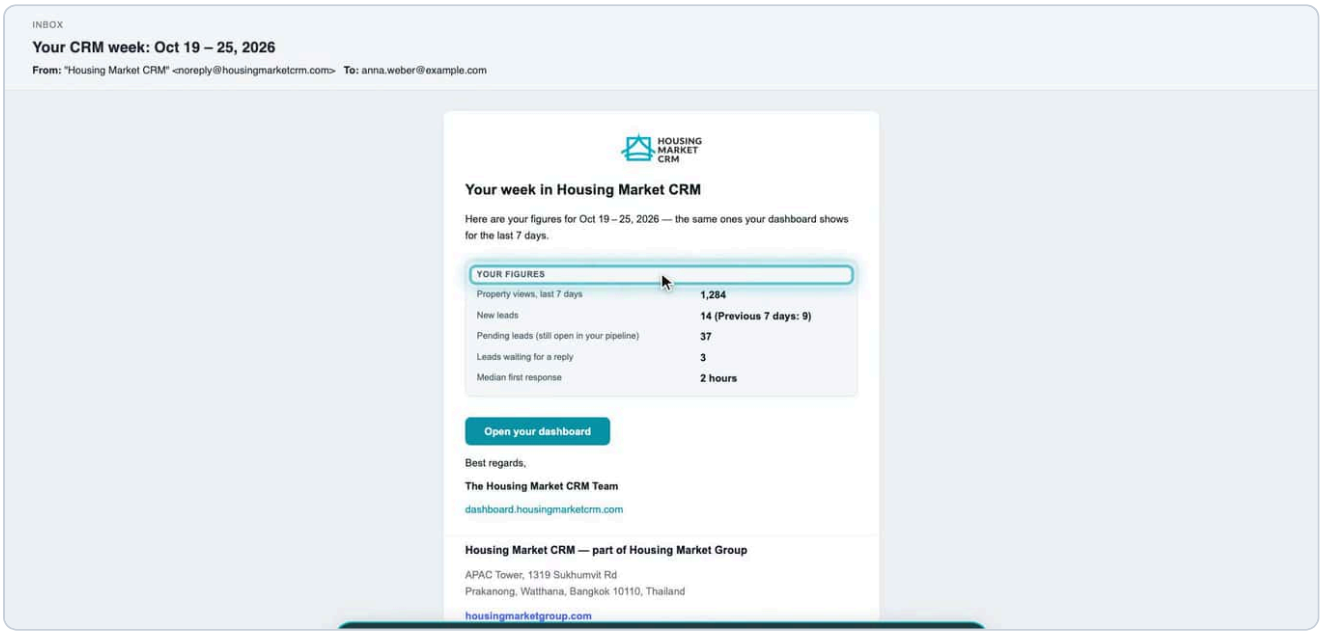


Figure 132.4 · Screen recorded 29 October 2026

5 **Property views** this week **new leads** against the week before.

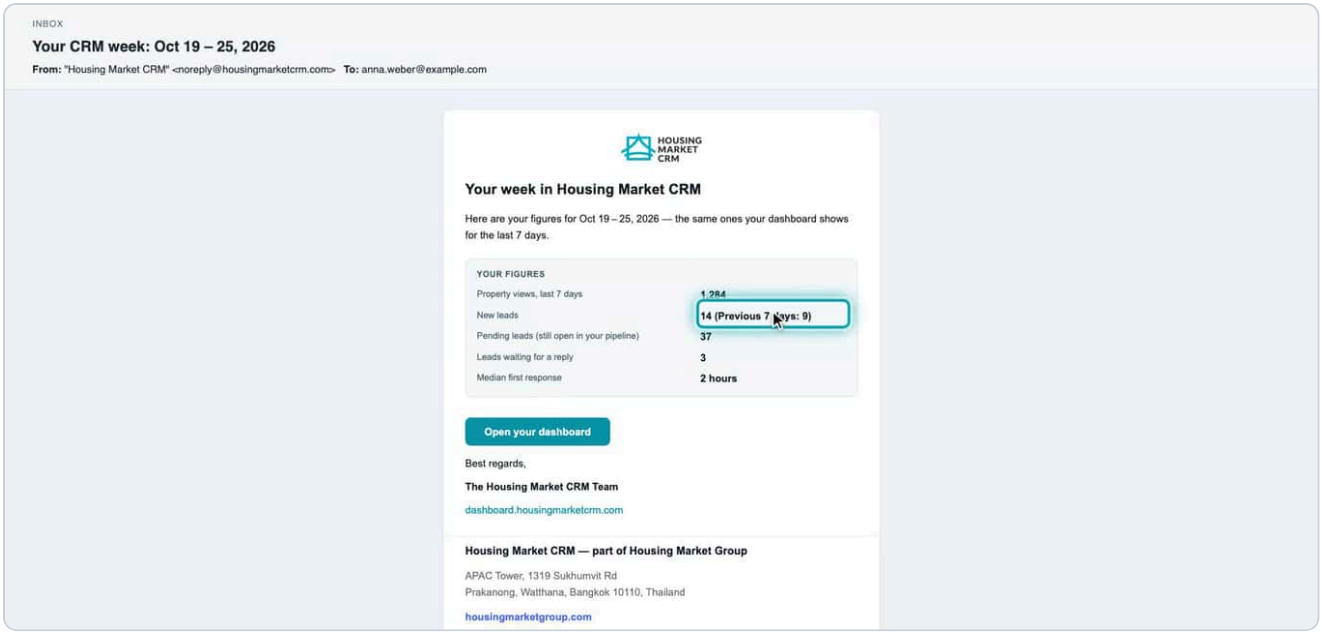


Figure 132.5 · Screen recorded 29 October 2026

6 and the leads **still open** in your pipeline.

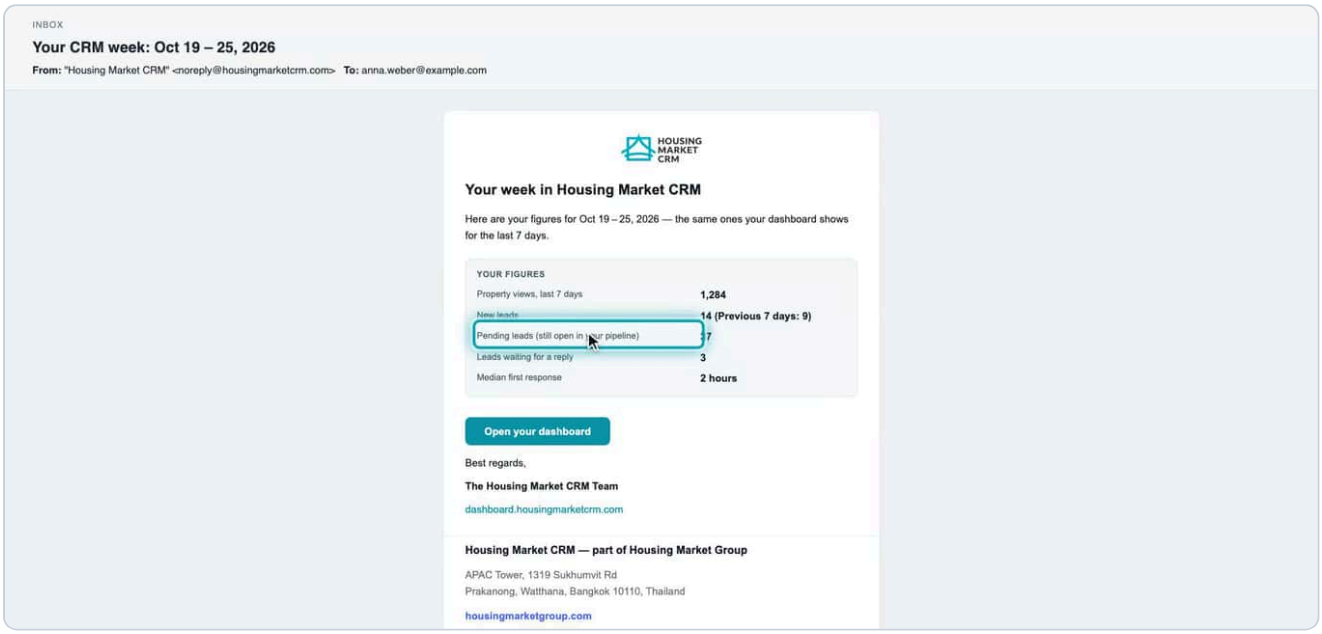


Figure 132.6 · Screen recorded 29 October 2026

7 It also counts leads **waiting for a reply** and your **median first response** time.

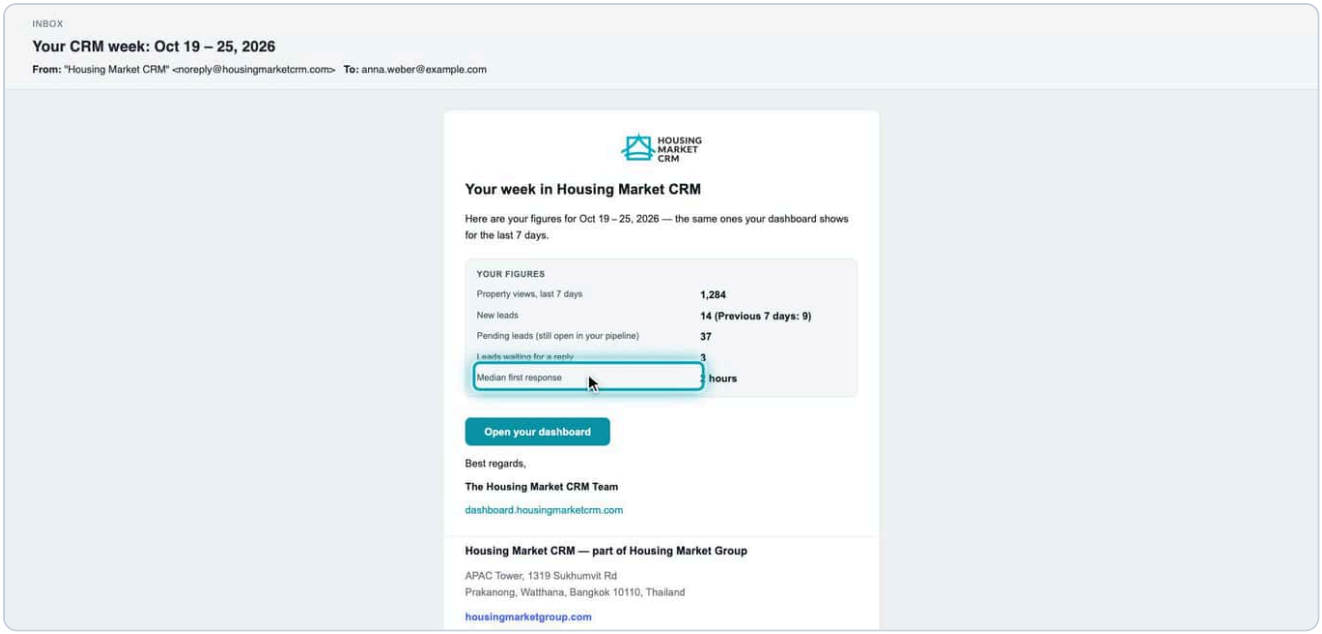


Figure 132.7 · Screen recorded 29 October 2026

8 One button opens **your dashboard**.

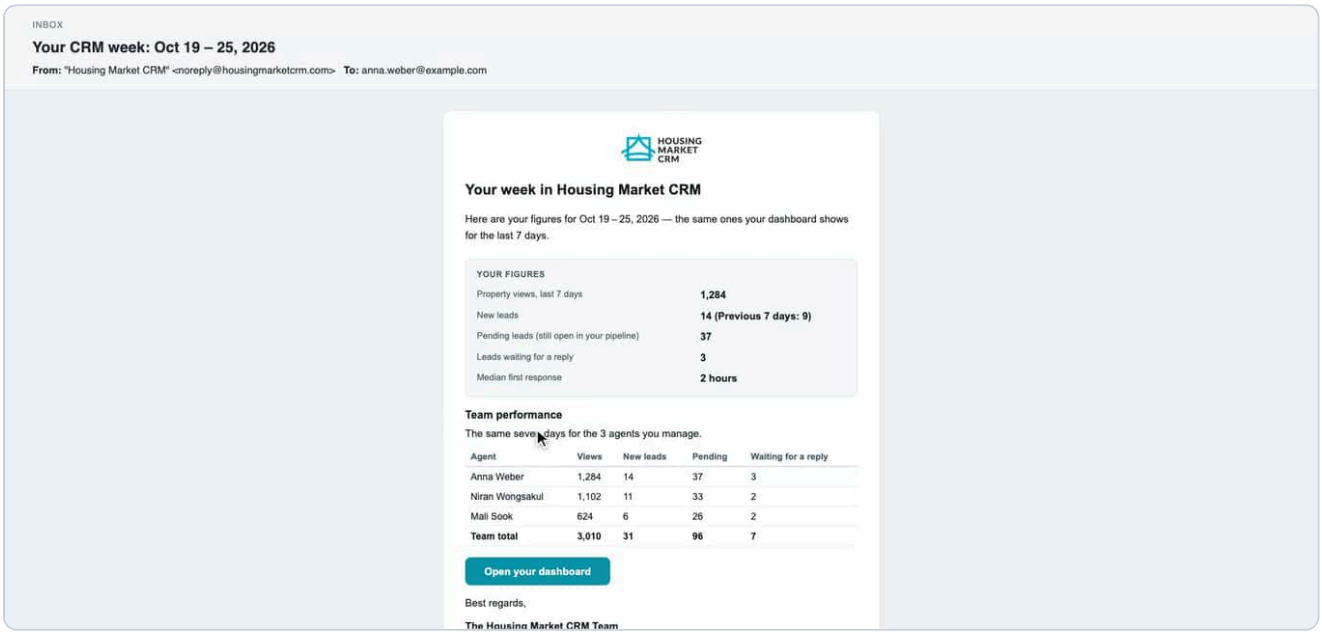


Figure 132.8 · Screen recorded 29 October 2026

9 Managers and admins on a plan with team reporting also get a **team table**.

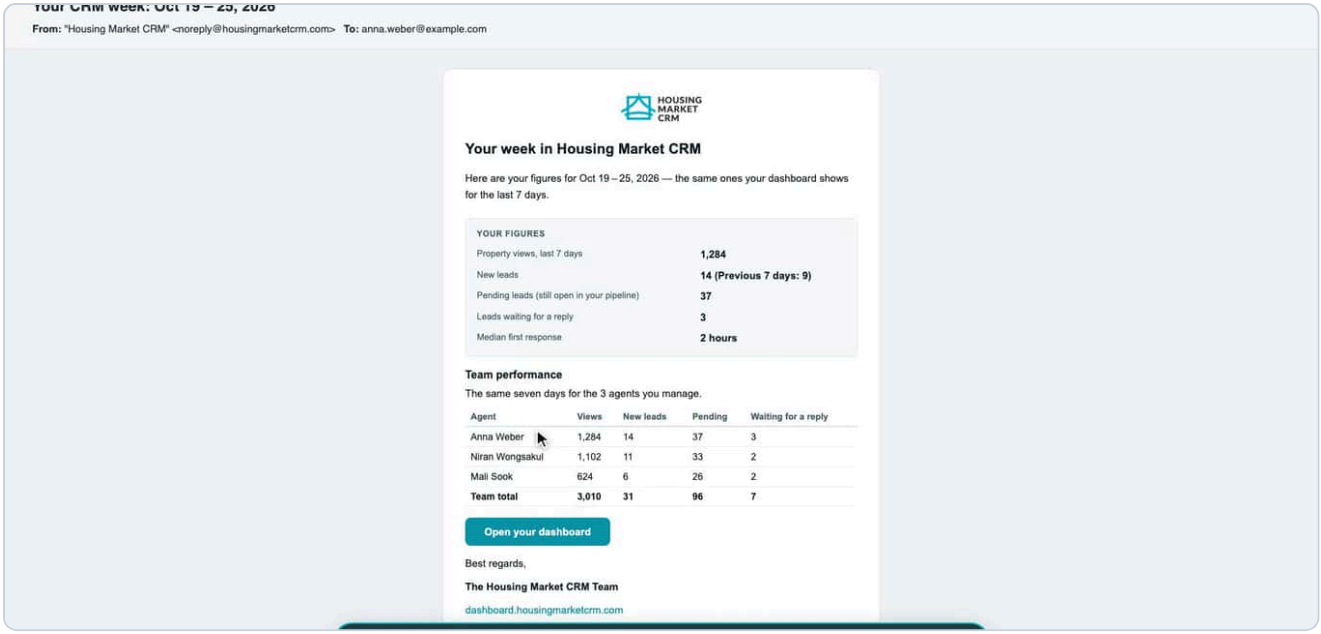


Figure 132.9 · Screen recorded 29 October 2026

10 **Team performance** shows each agent and a **team total**.

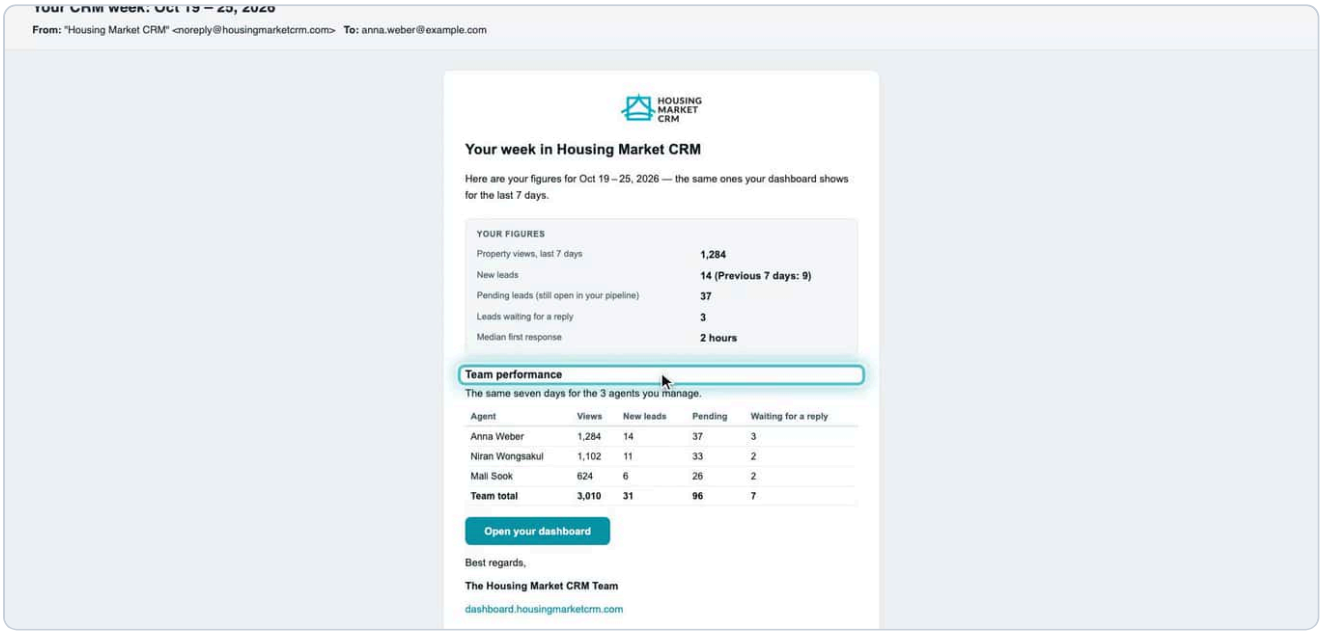


Figure 132.10 · Screen recorded 29 October 2026

11 It arrives **once a week**, during your working hours, normally on Monday.

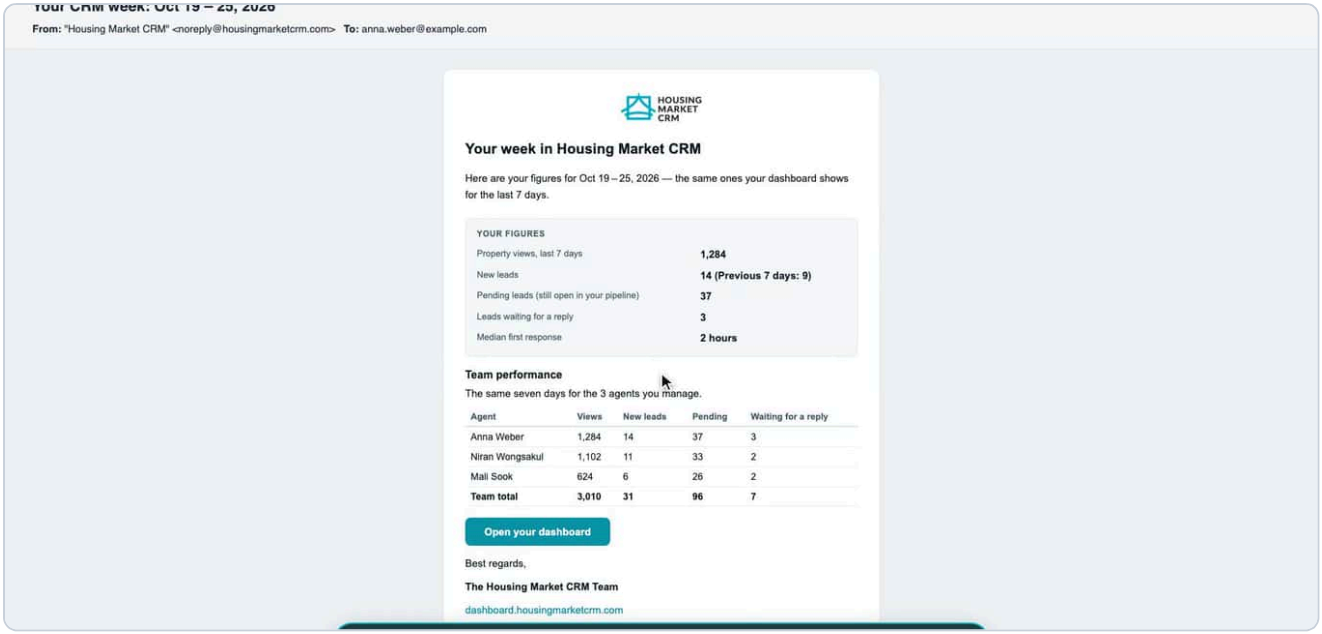


Figure 132.11 · Screen recorded 29 October 2026

12 A week with **nothing in it** is not mailed.

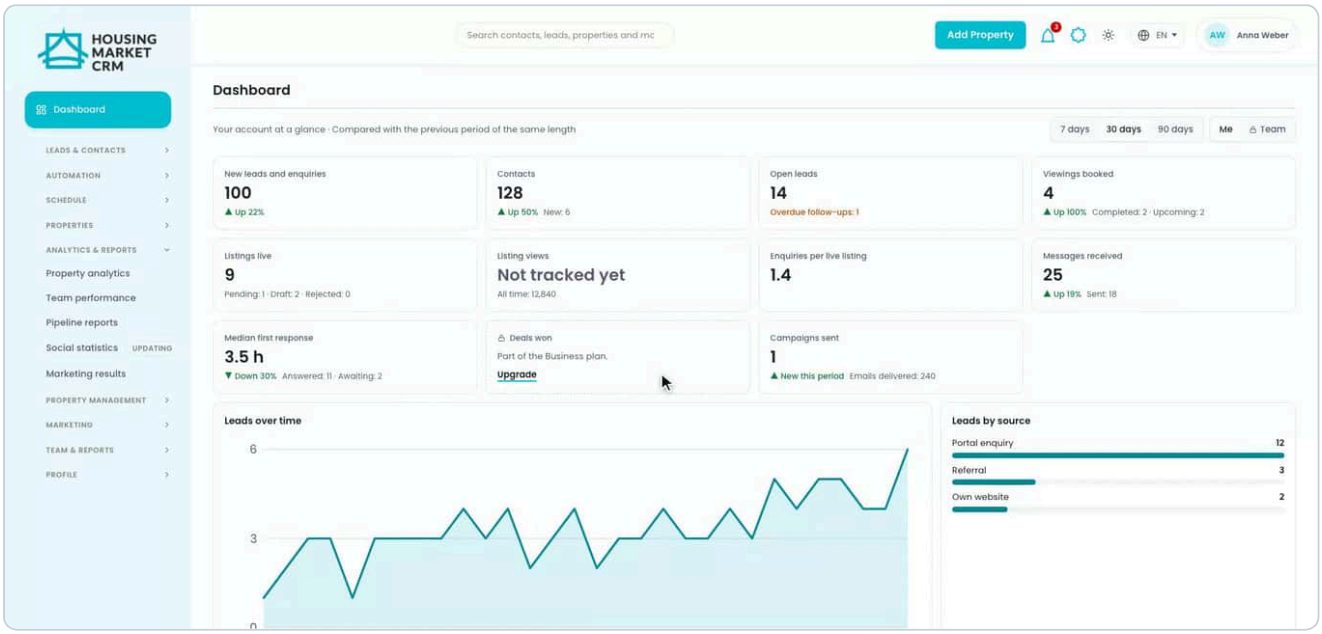


Figure 132.12 · Screen recorded 29 October 2026

13 To change it, open **Settings** in Housing Market CRM.

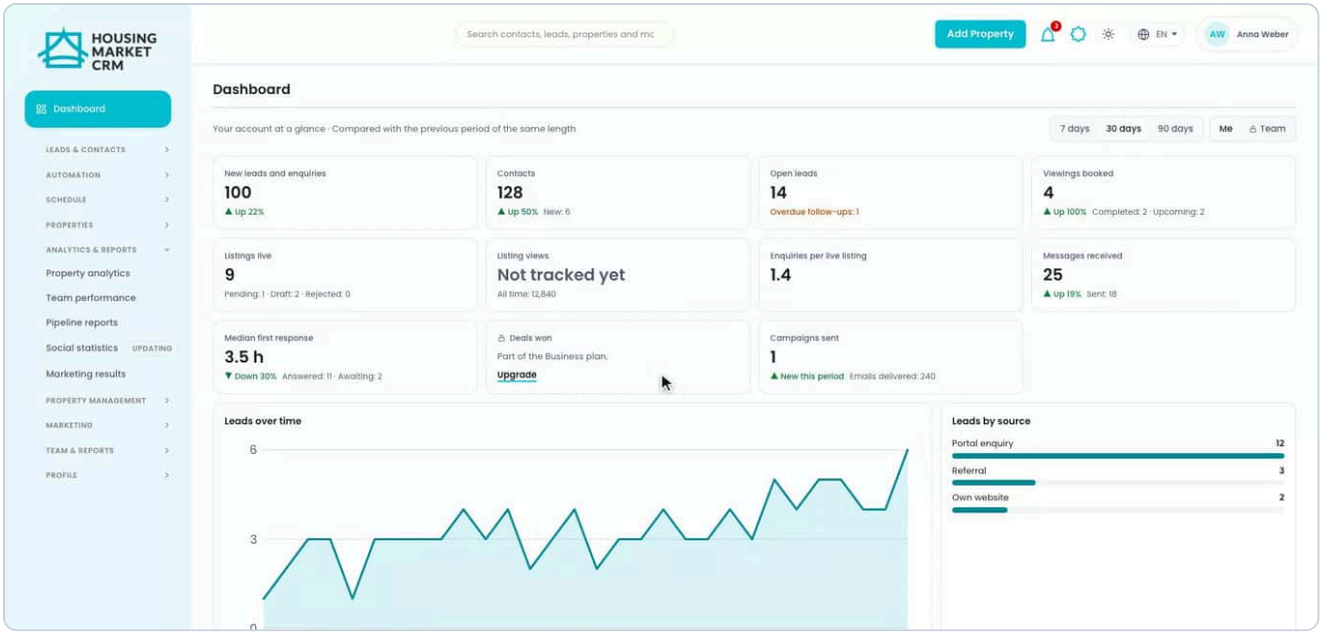


Figure 132.13 · Screen recorded 29 October 2026

14 Click the **Settings** icon at the top.

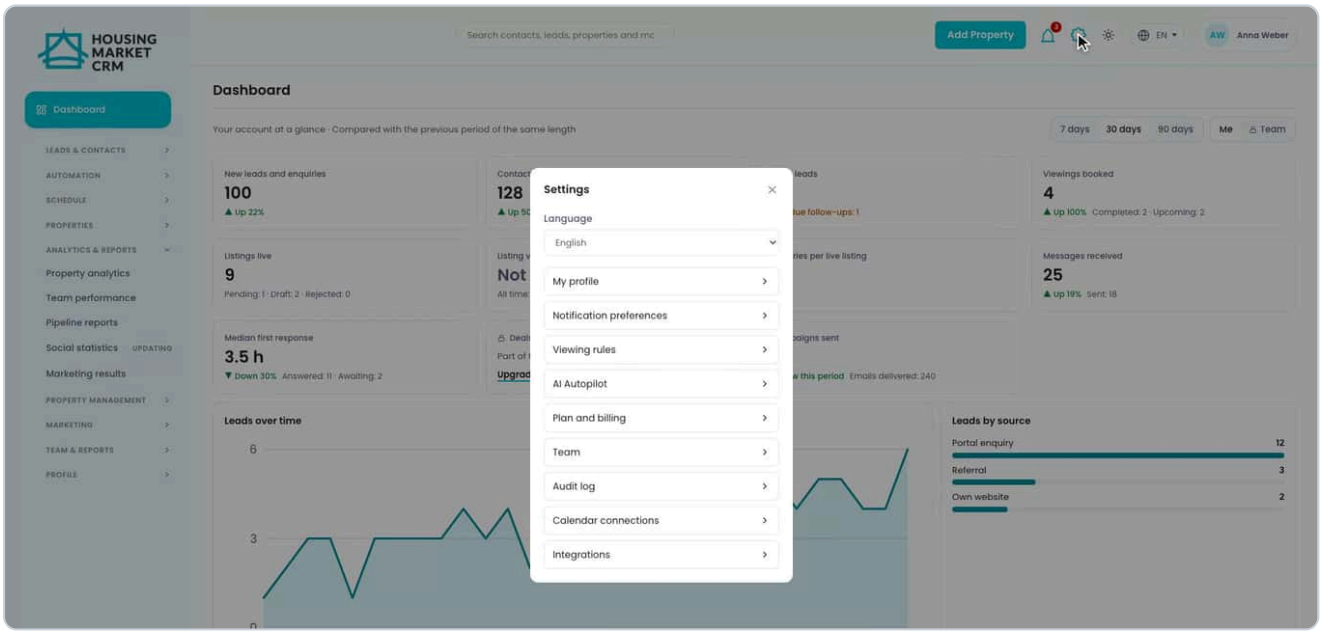


Figure 132.14 · Screen recorded 29 October 2026

15 Choose **Notification preferences**.

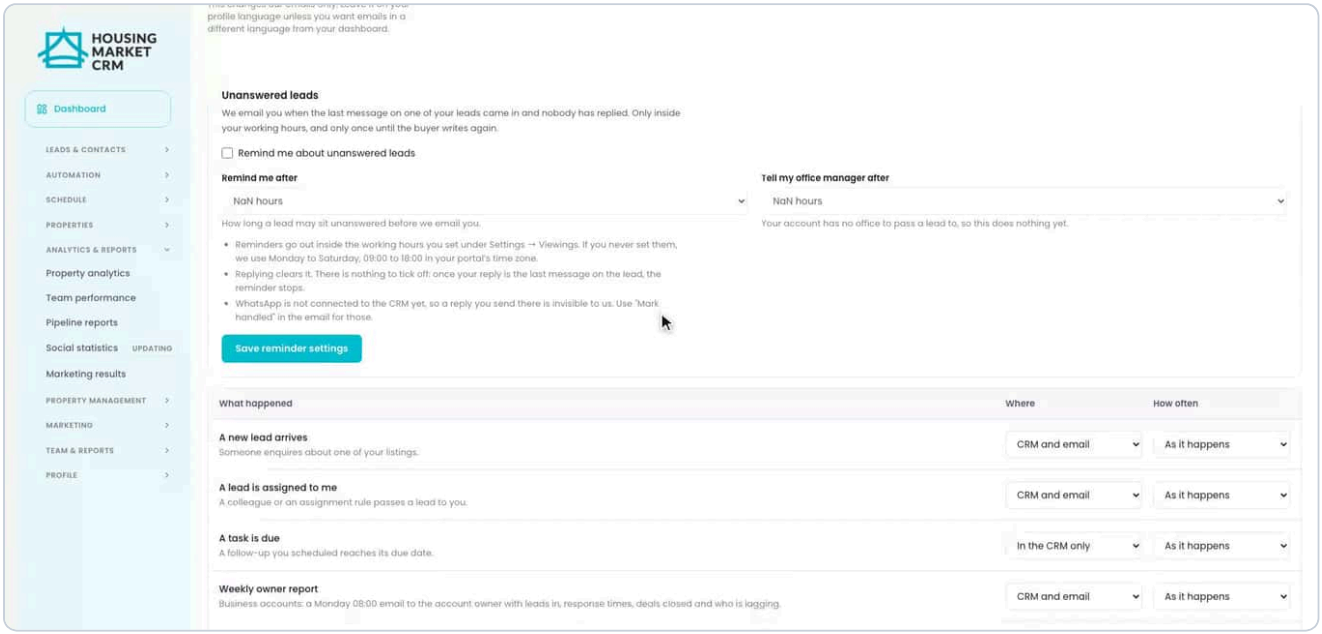


Figure 132.15 · Screen recorded 29 October 2026

16 Find **Weekly CRM statistics**.

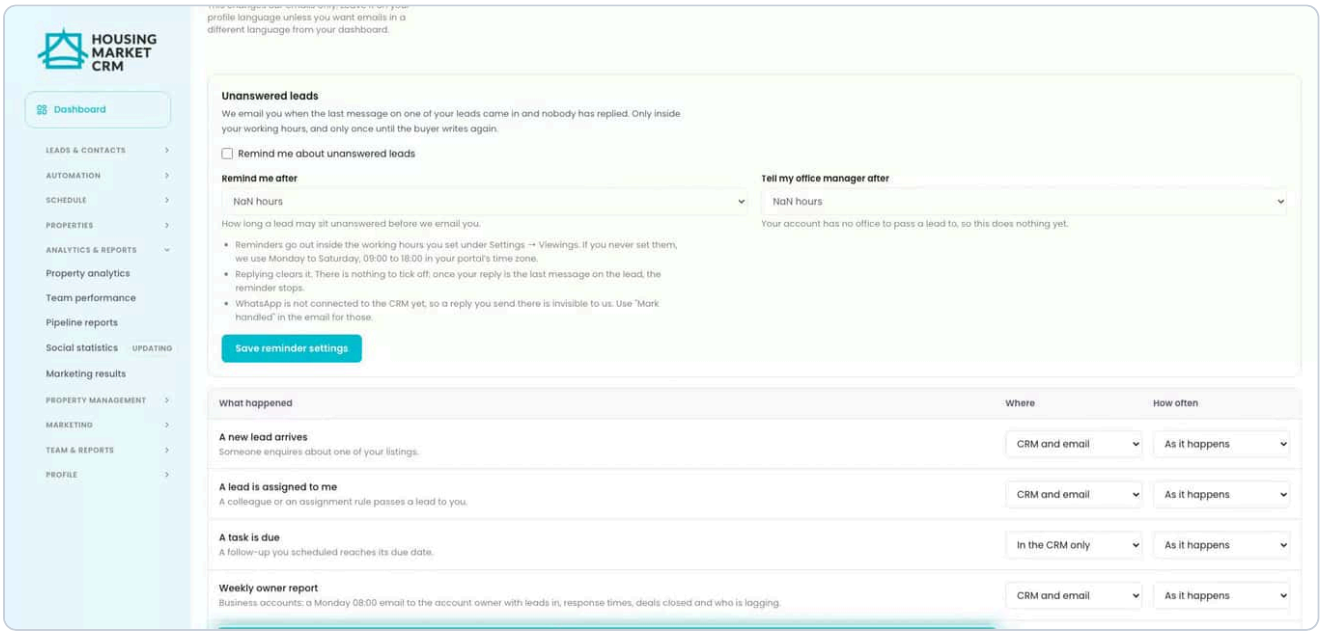


Figure 132.16 · Screen recorded 29 October 2026

17 Choose **Don't notify me** to switch the email off.

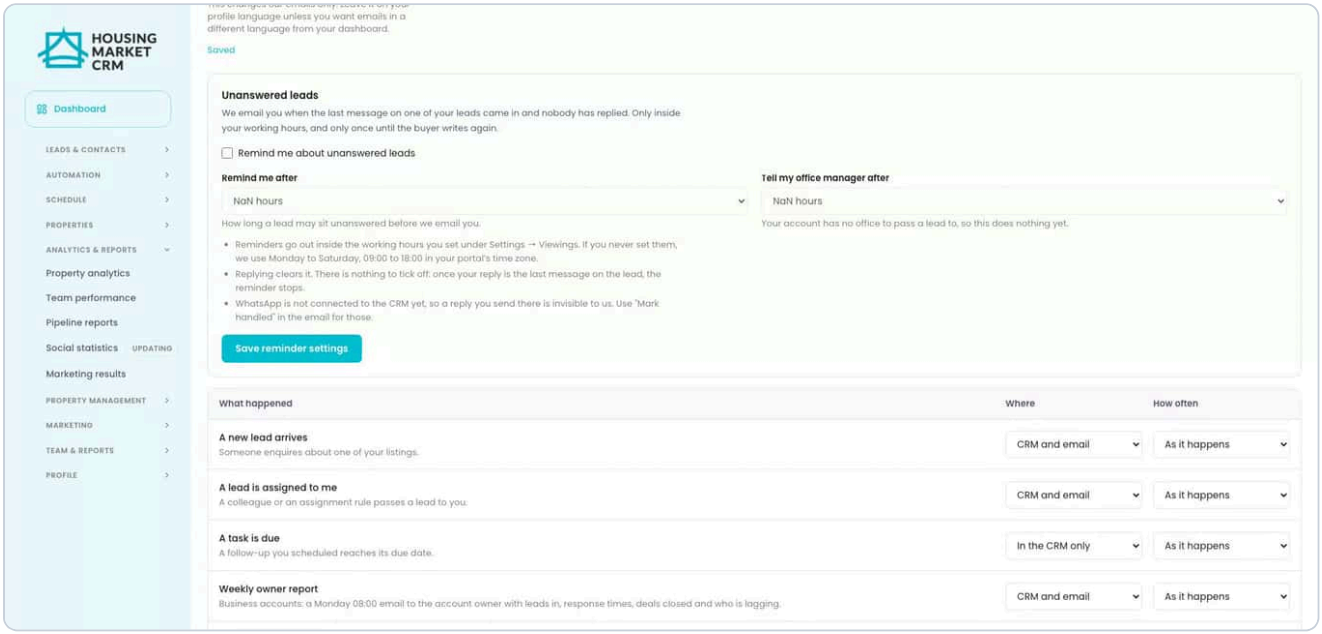


Figure 132.17 · Screen recorded 29 October 2026

18 The setting is **saved as you change it**.

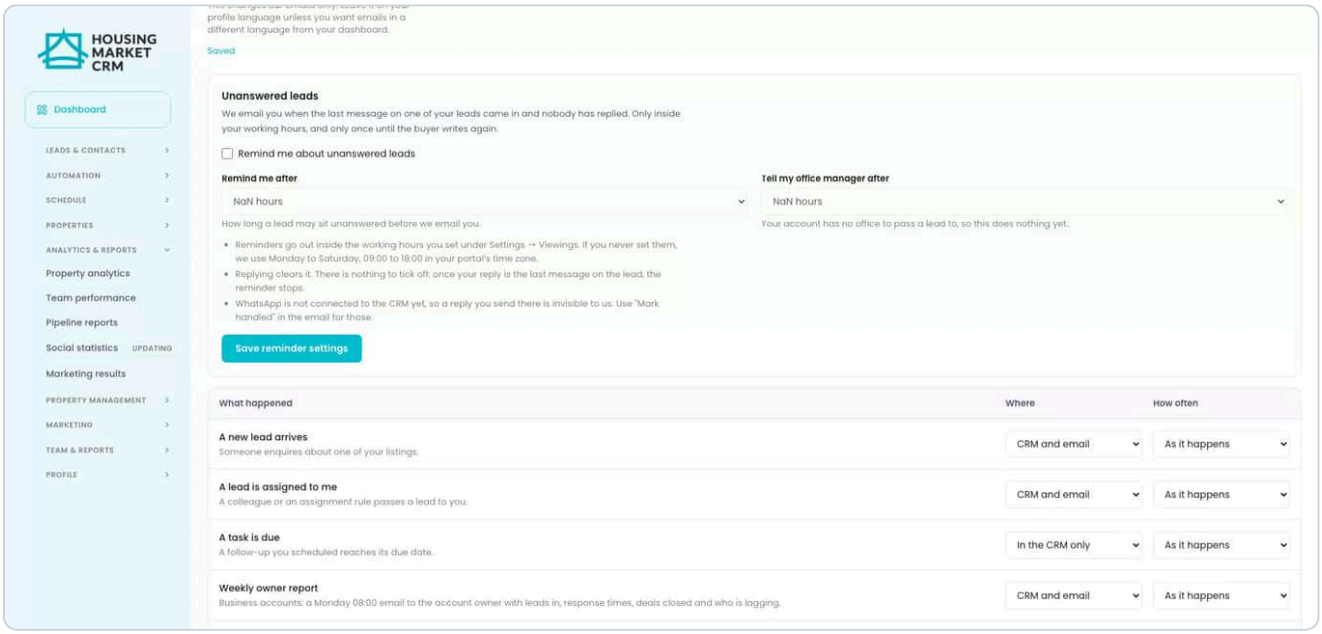


Figure 132.18 · Screen recorded 29 October 2026

19 Choose **CRM and email** to get it again.

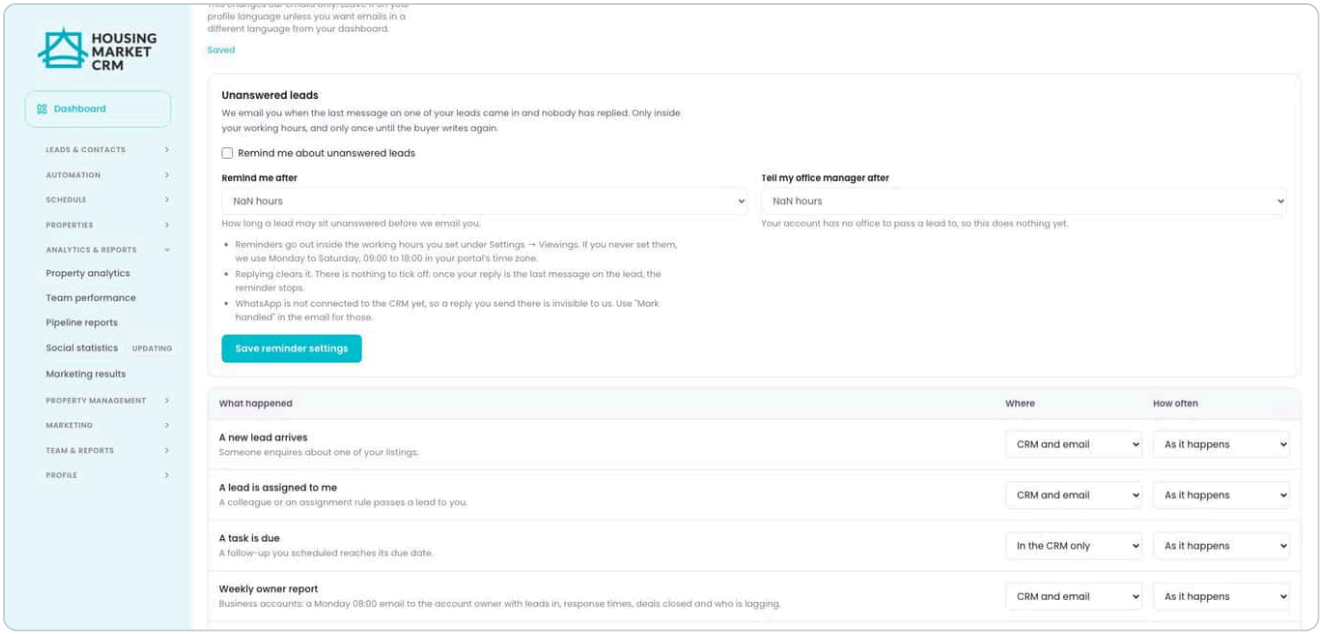


Figure 132.19 · Screen recorded 29 October 2026

20 Your mail app can also **unsubscribe you with one click**.

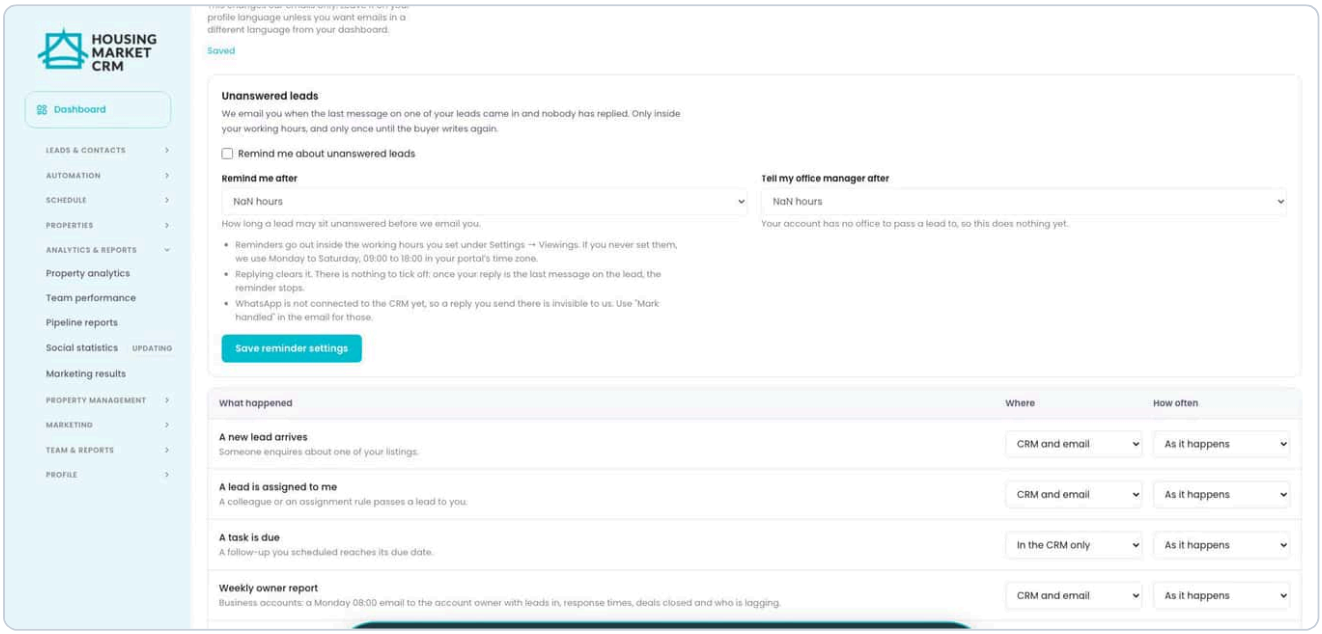


Figure 132.20 · Screen recorded 29 October 2026

RELATED HELP CENTER ARTICLES

What do team leaderboards and the weekly owner email show?	faq.housingmarketgroup.com/faq/what-do-team-leaderboards-and-the-weekly-owner-email-show

133 CHAPTER 133

The audit log

Business | For admins | Watch the video

OVERVIEW

Yes. The CRM records who changed what and when on an account from the day it opens, and reading the log is part of Business.

The audit log answers questions like who reassigned a lead, who deleted a contact, and whether a support session that signed in to the account changed anything.

Entries are written on every plan from the day an account opens, because history cannot be filled in afterwards: an office that upgrades to Business finds a log already there. Reading it is part of Business, since its purpose is managing other people.

Whoever may manage seats reads the whole account's log; everyone else sees only their own actions. Entries cannot be edited or deleted by anyone, including an admin.

From the Help Center: **Is there an audit log?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

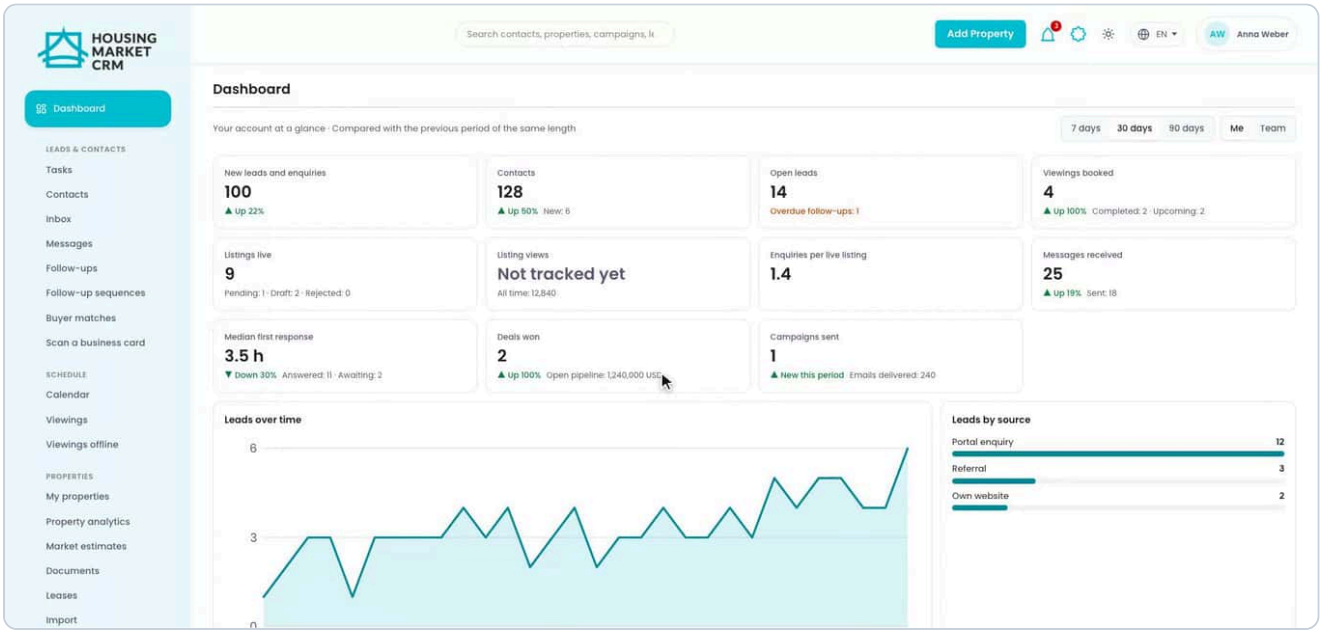


Figure 133.1 · Screen recorded 17 September 2026

2 Click the **Settings** icon at the top.

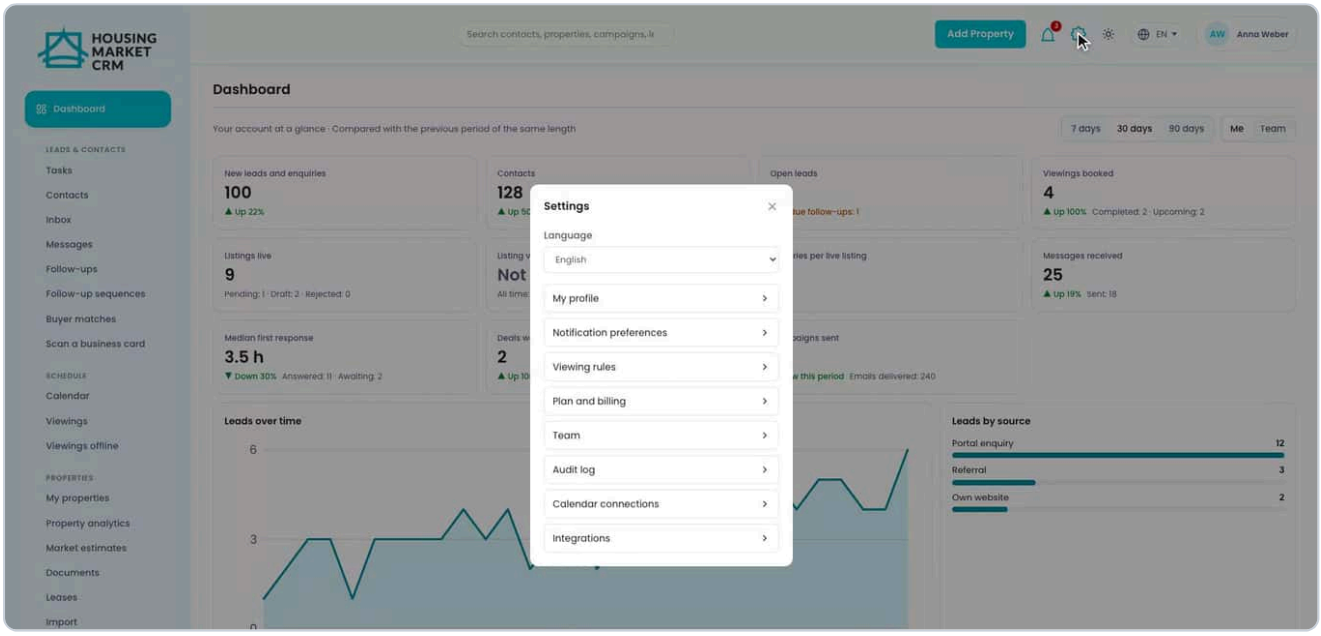


Figure 133.2 · Screen recorded 17 September 2026

3 Choose **Audit log**.

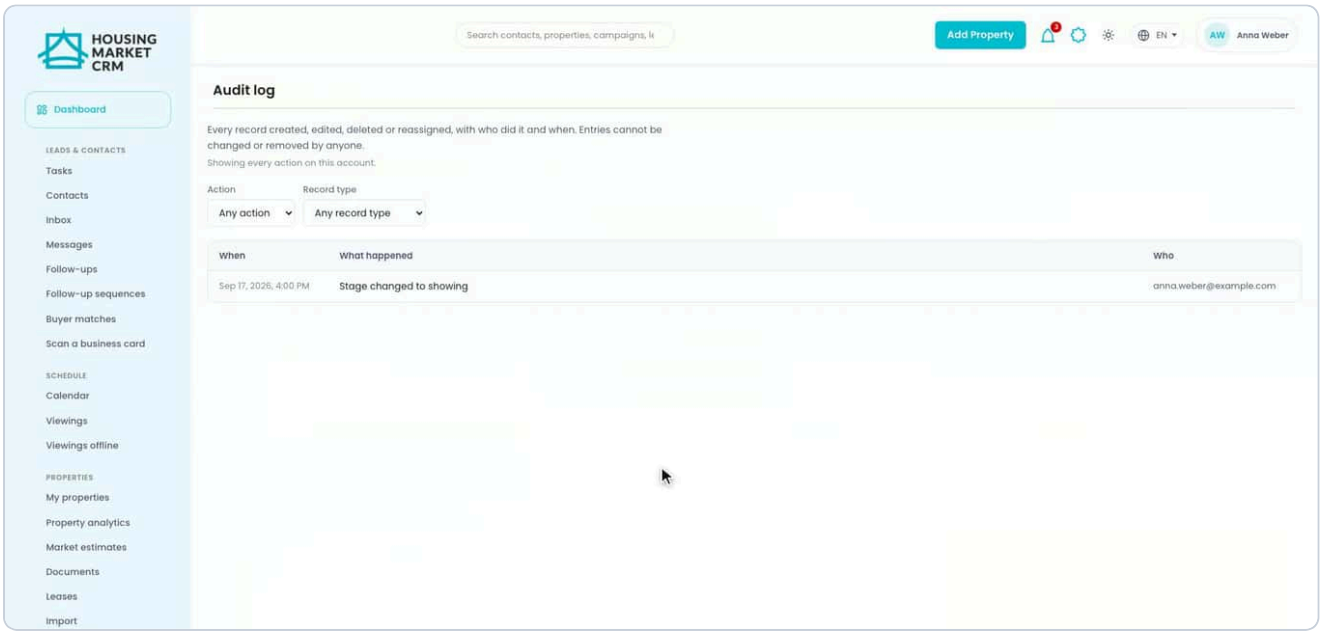


Figure 133.3 · Screen recorded 17 September 2026

4 Every create, edit, delete and reassignment is recorded — **permanently**.

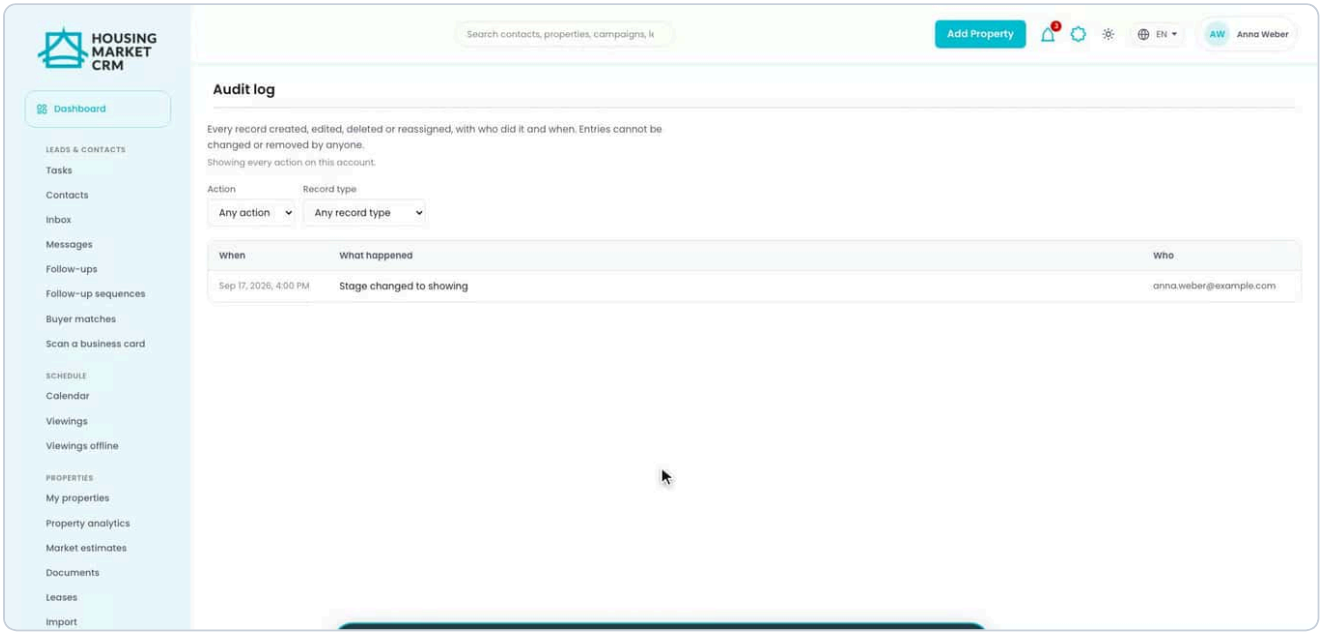


Figure 133.4 · Screen recorded 17 September 2026

5 Each entry shows **when**, **what** and **who**.

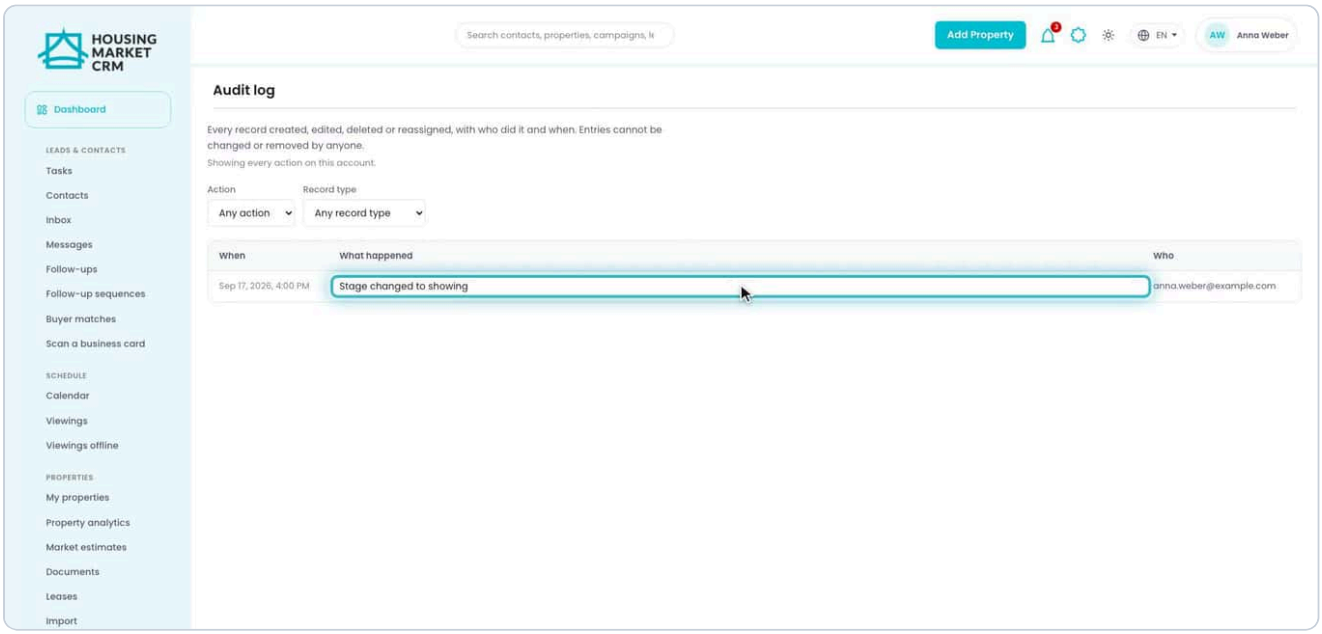


Figure 133.5 · Screen recorded 17 September 2026

6 Filter by **action** — e.g. **Reassigned** and by **record type**.

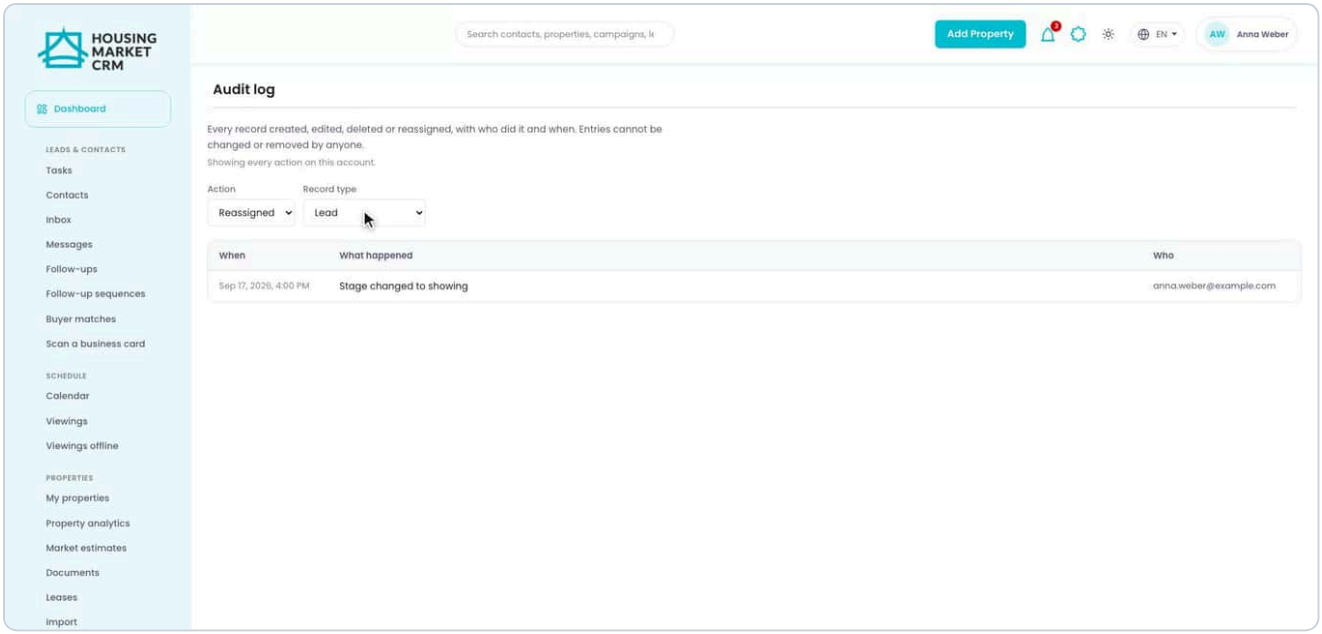


Figure 133.6 · Screen recorded 17 September 2026

134 CHAPTER 134

Extra users

Business | For office managers | Watch the video

TODO The Help Center says Business owners use "Change users" in Plan and billing; the video (2026-09-24) says the number of users is changed by asking support. Check the current screen and correct whichever is wrong.

OVERVIEW

In Plan and billing: choose Move to Pro or Move to Business, Change users on Business, and Manage billing to change your card or cancel.

On a computer, choose Settings (the gear) at the top of the screen and then Plan and billing. Only the account owner can buy or change anything; colleagues on a Business account see that the account is billed through the owner.

Moving to Pro or Business

Under Plans, choose Move to Pro (29 USD per month) or Move to Business (99 USD per month) and pay in the secure checkout. You come back to Plan and billing, which shows your new plan. Prices are in US dollars everywhere.

Users on Business

Business includes up to 10 users. To add more, choose Change users and set the total; each additional user is 5 USD per month, charged or credited pro rata on the next invoice. You cannot go below the users you have plus the ones you have invited. The card is on every plan, not only Business: on Free and Pro it explains that extra users come with Business and offers that upgrade instead of a control that could not work.

Where your own account cannot complete the change online, the card says so and asks you to contact support rather than drawing a button that would fail. And setting this number is only about how many users you are paying for — the people themselves join by email invitation from the Team page, never by being typed in here.

Importing from a file

Importing from a file is free on every plan, so there is nothing to buy for it here. An account that already has the Importer add-on keeps it as before.

Changing your card, invoices and cancelling

Choose Manage billing. It opens a secure billing page, where you can change plan, update your card, download invoices or cancel, and then brings you back. When a paid plan ends, the account returns to the free plan: nothing is deleted and the core CRM keeps working. Cancelling the Importer turns off only the Importer.

If Manage billing cannot open, the CRM tells you why instead of simply failing. It says that billing management is temporarily unavailable, that your plan and your data are not affected, and asks you to contact support so we can make the change for you. That sentence means the payment provider refused the request because of the way the account is set up, so pressing the button again will not help — and nothing has been charged, cancelled or changed in the meantime.

From the Help Center: **How do I upgrade, add users or cancel?**

STEP BY STEP

1. Open your **Housing Market CRM** account.

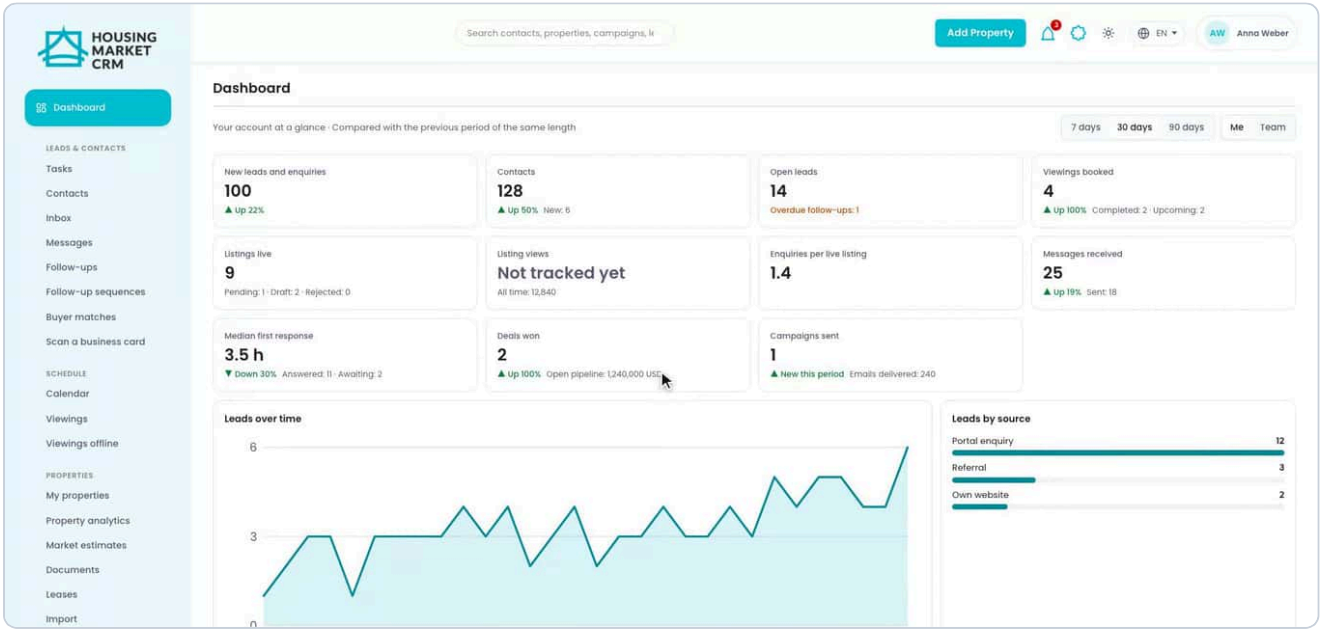


Figure 134.1 · Screen recorded 24 September 2026

2 Click **Team** in the left menu.

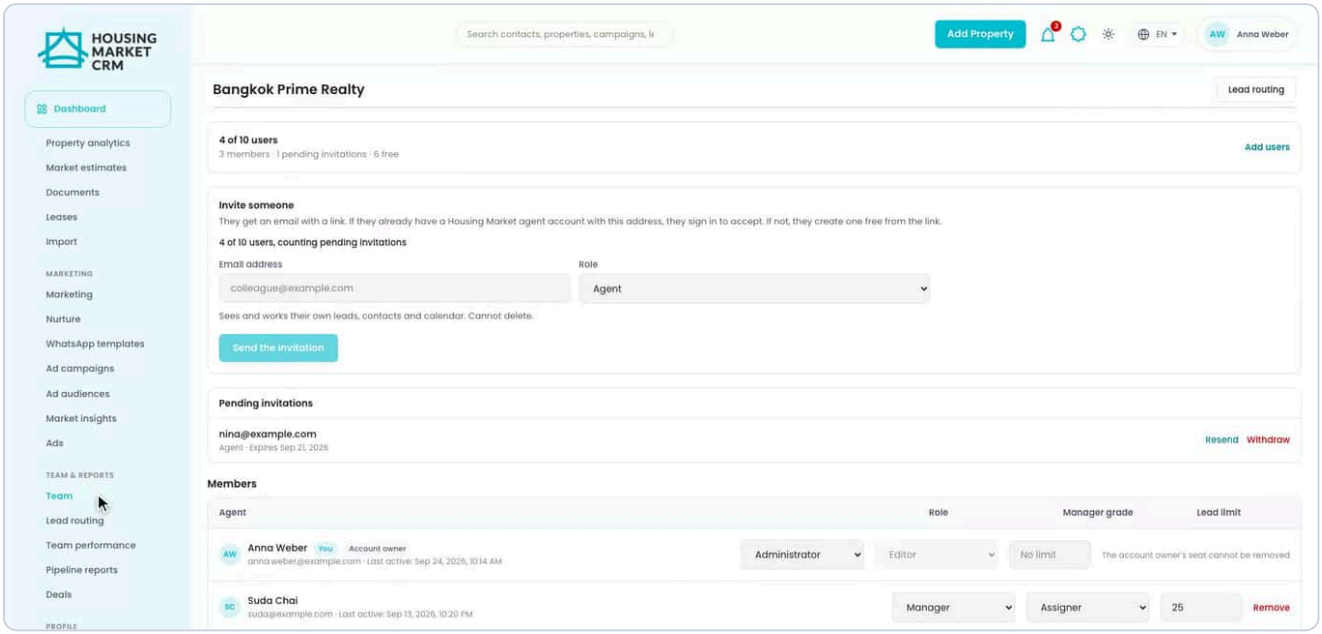


Figure 134.2 · Screen recorded 24 September 2026

3 Business includes **10 users**.

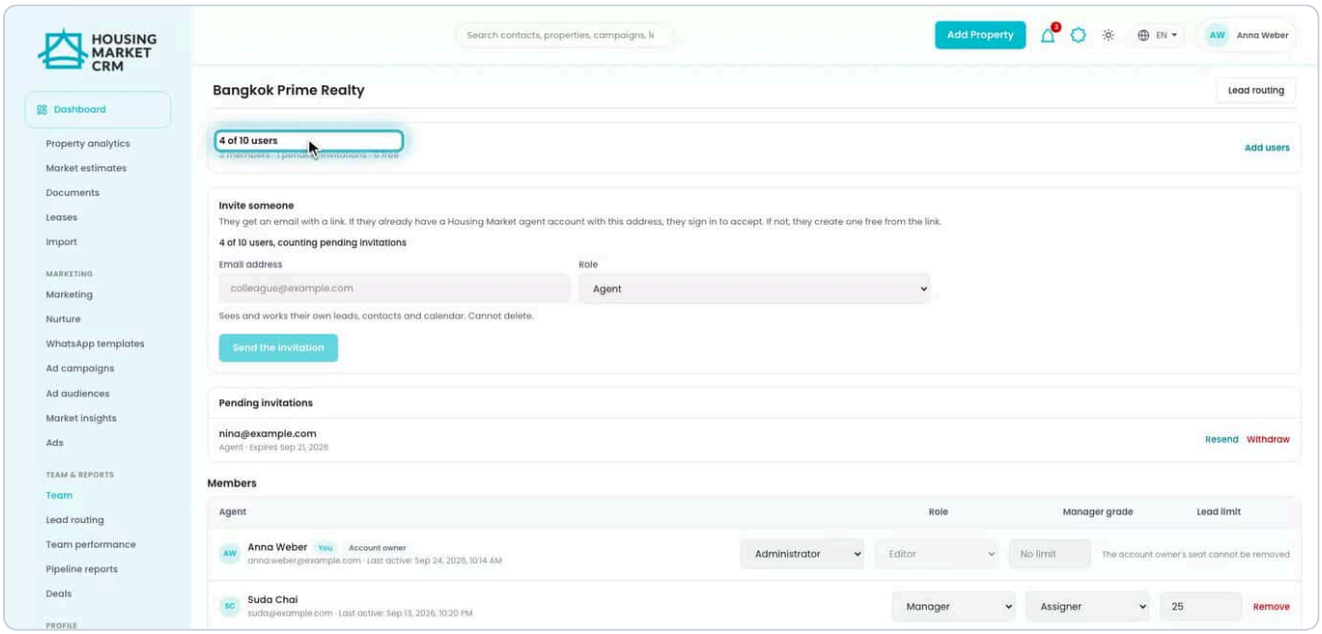


Figure 134.3 · Screen recorded 24 September 2026

4 Members and **pending invitations** both hold a seat.

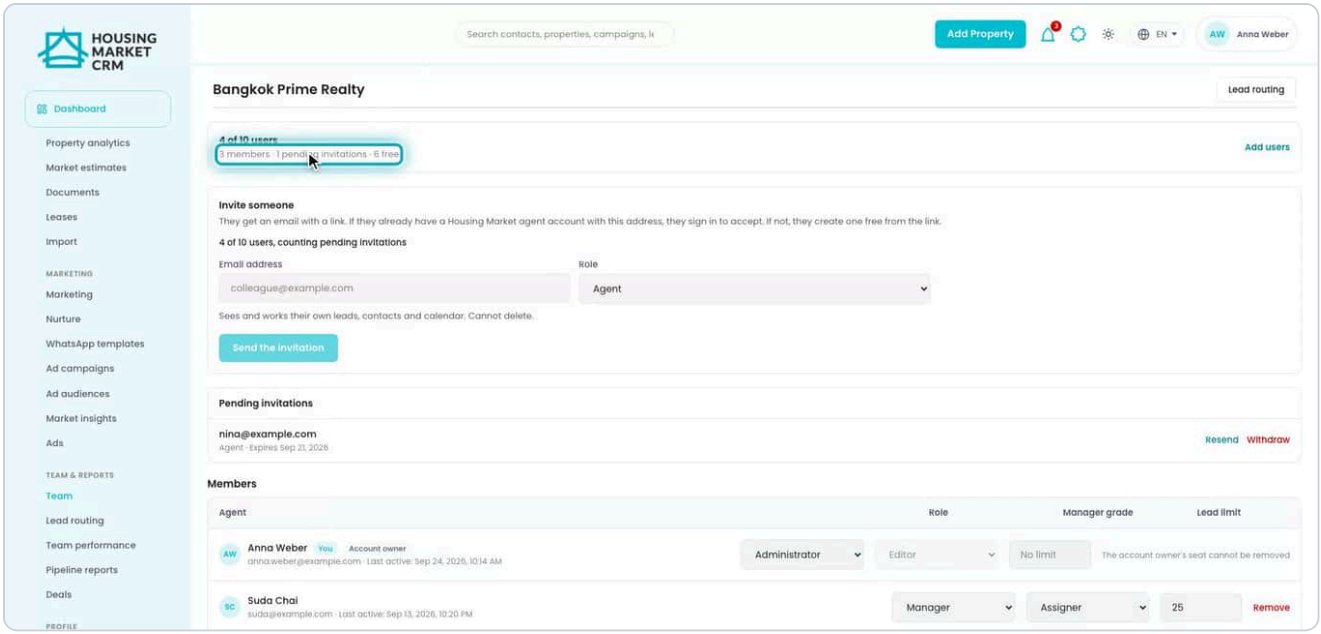


Figure 134.4 · Screen recorded 24 September 2026

5 Click **Add users.**

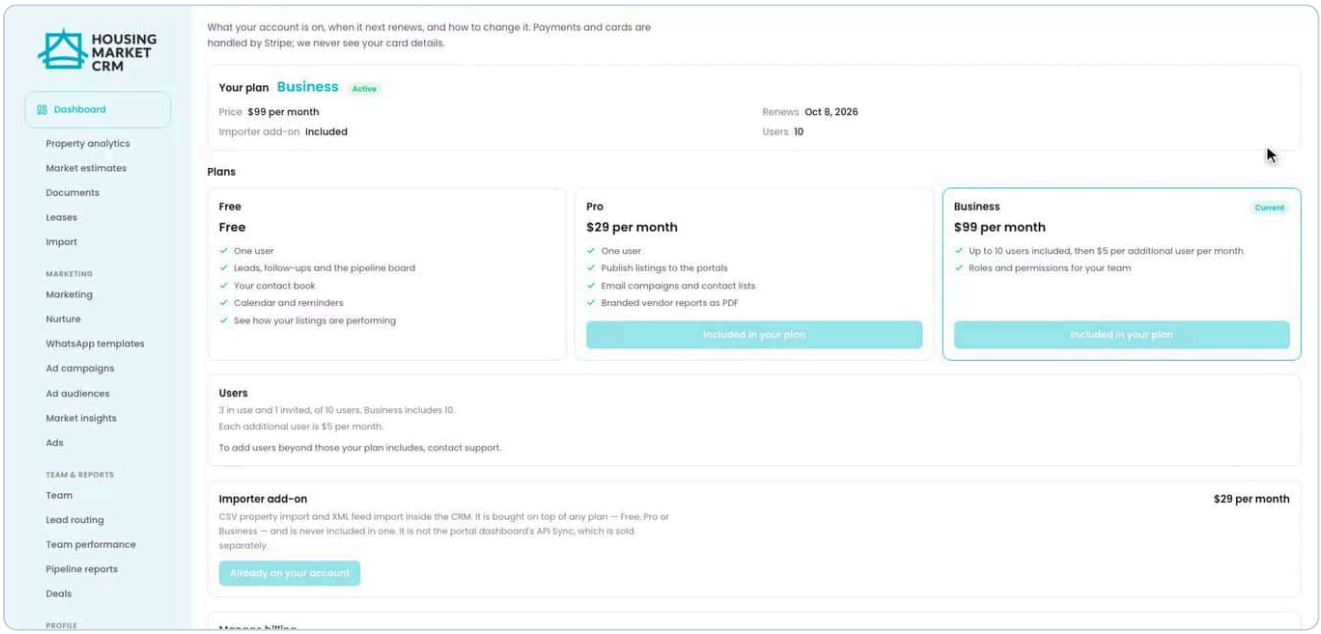


Figure 134.5 · Screen recorded 24 September 2026

6 It opens the **Users** card on Plan and billing.

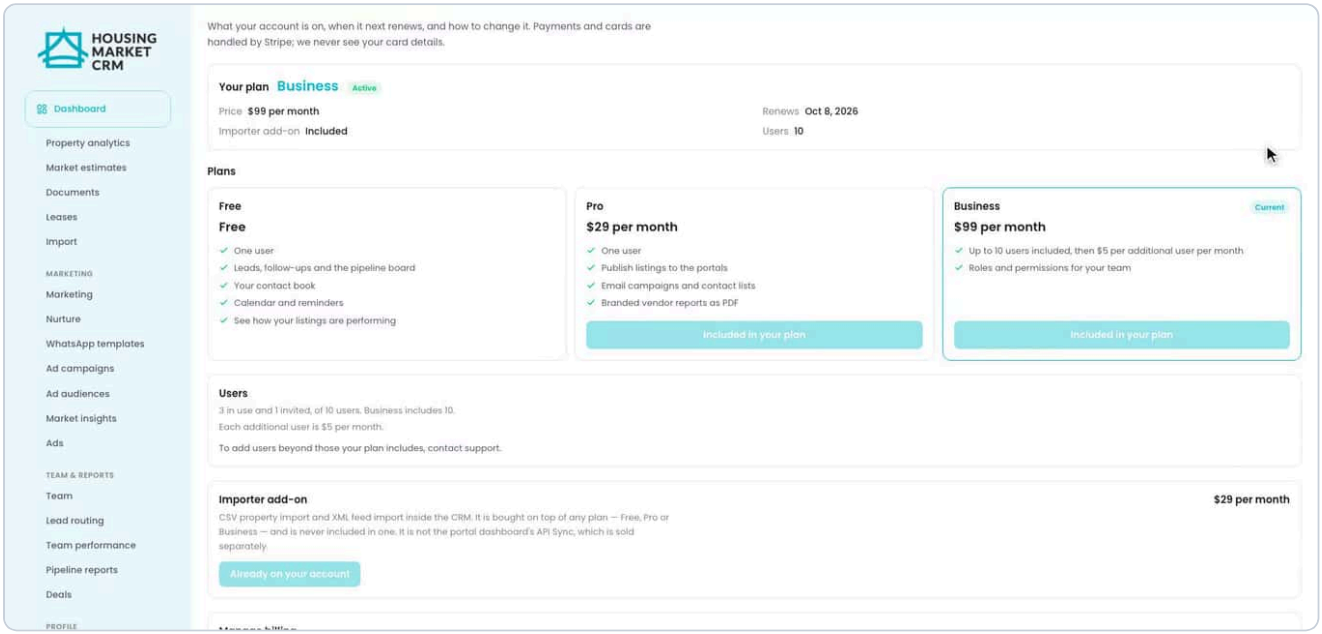


Figure 134.6 · Screen recorded 24 September 2026

7 Everything about the size of your team is here.

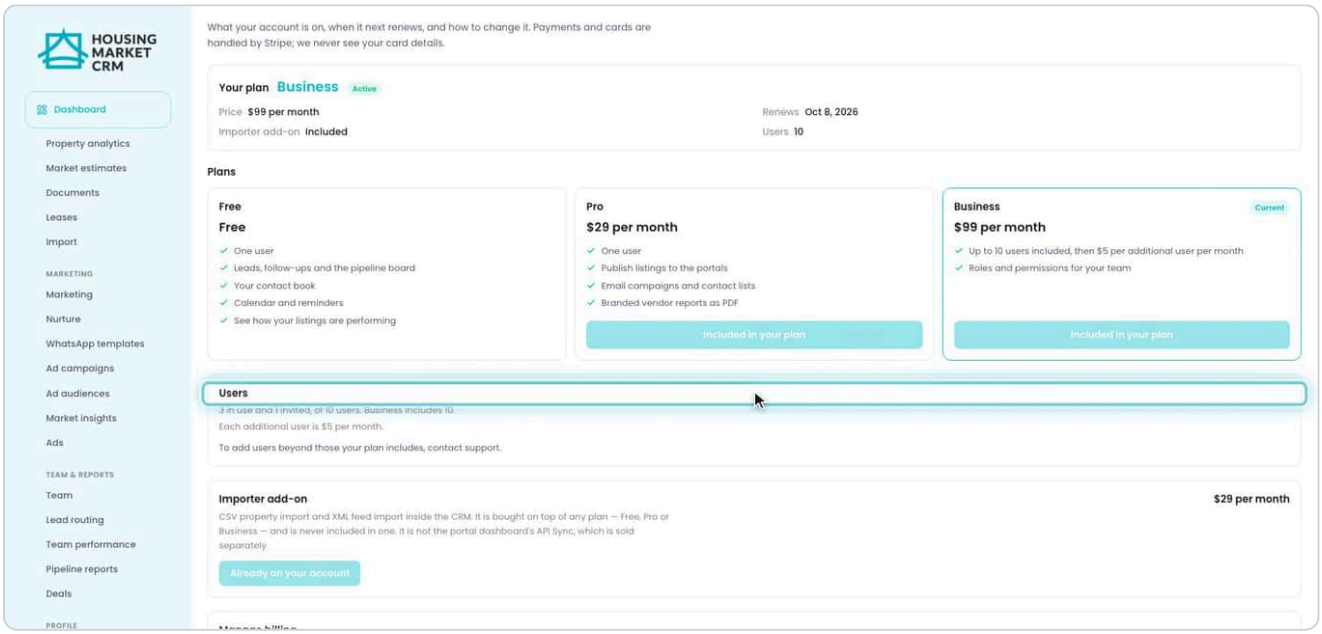


Figure 134.7 · Screen recorded 24 September 2026

8 In use, invited and **bought** — at a glance.

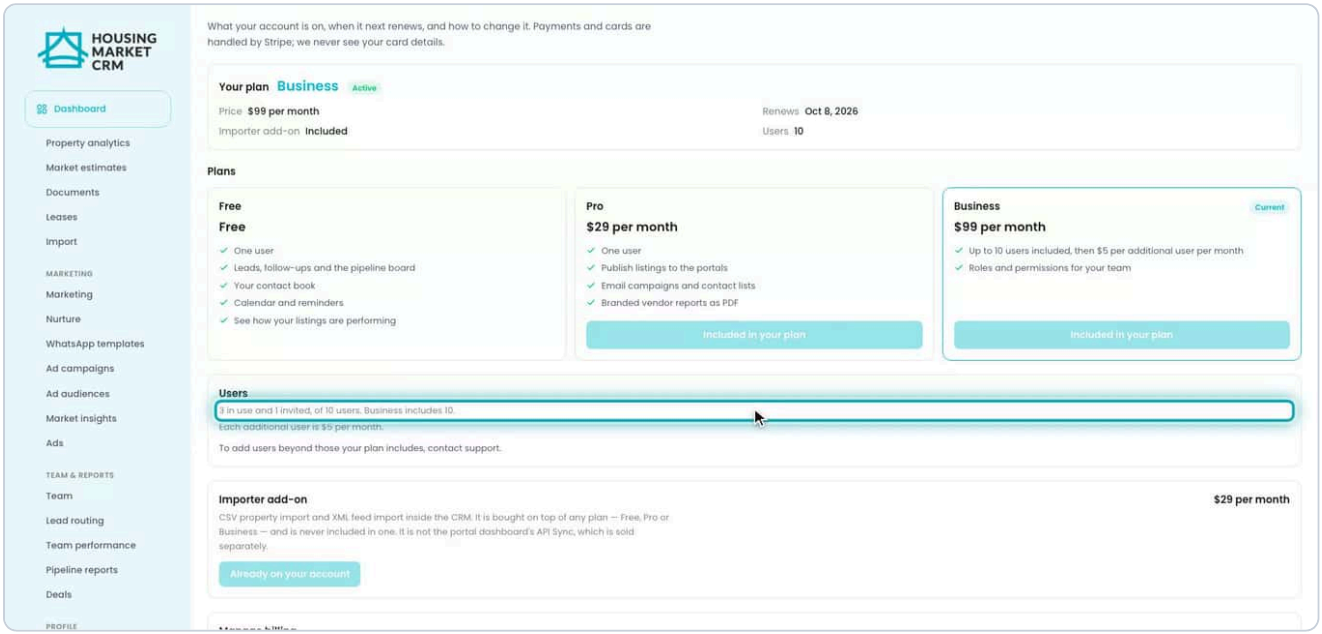


Figure 134.8 · Screen recorded 24 September 2026

9 Each additional user is **$5 per month**.

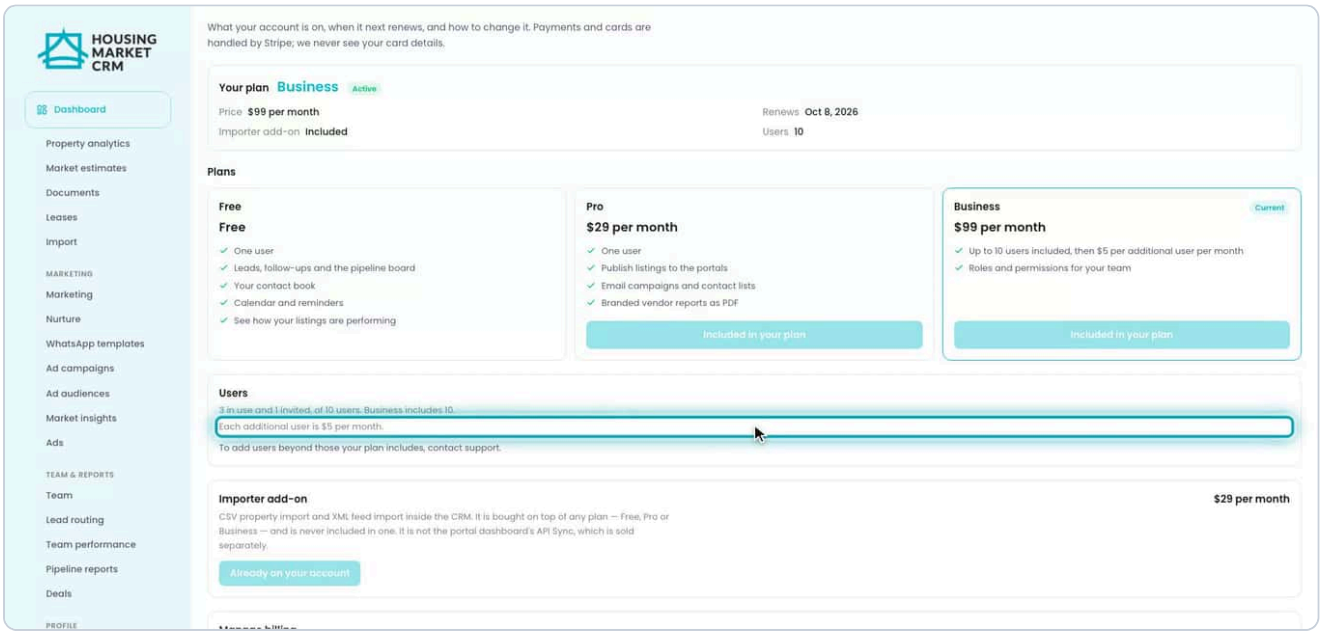


Figure 134.9 · Screen recorded 24 September 2026

10 The number of users is part of your **subscription** so you ask **support** for it, rather than changing it here.

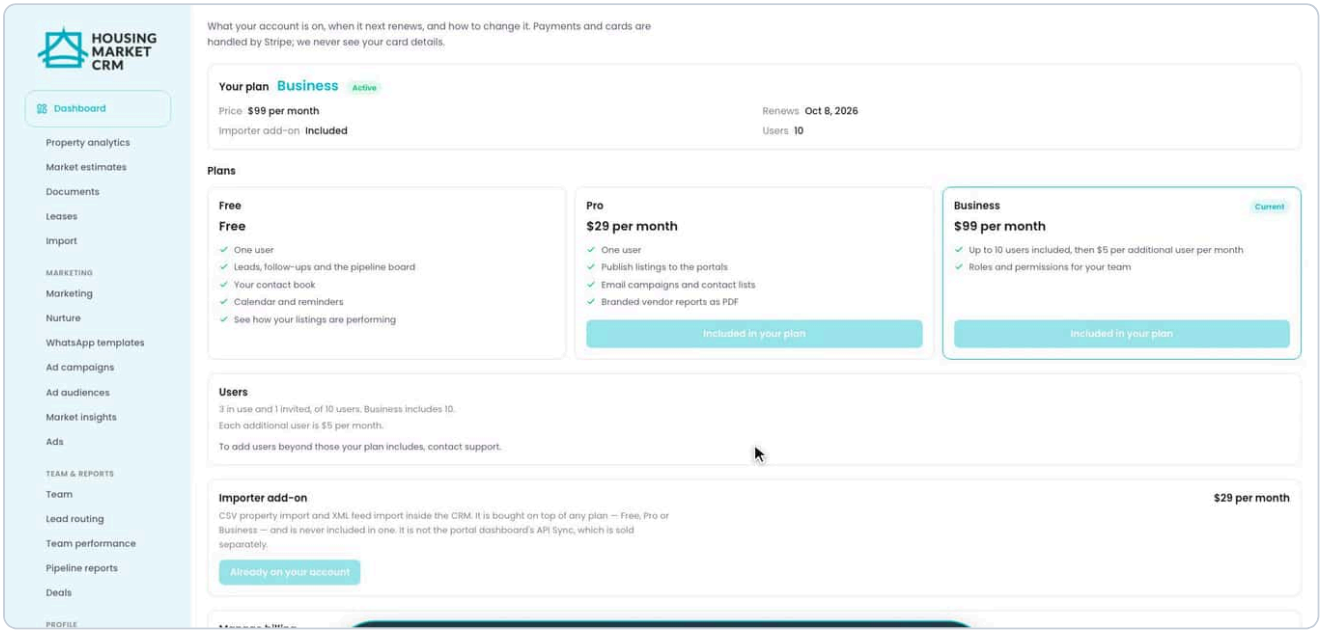


Figure 134.10 · Screen recorded 24 September 2026

11 **Fewer** users goes the same way — and is credited on your next invoice.

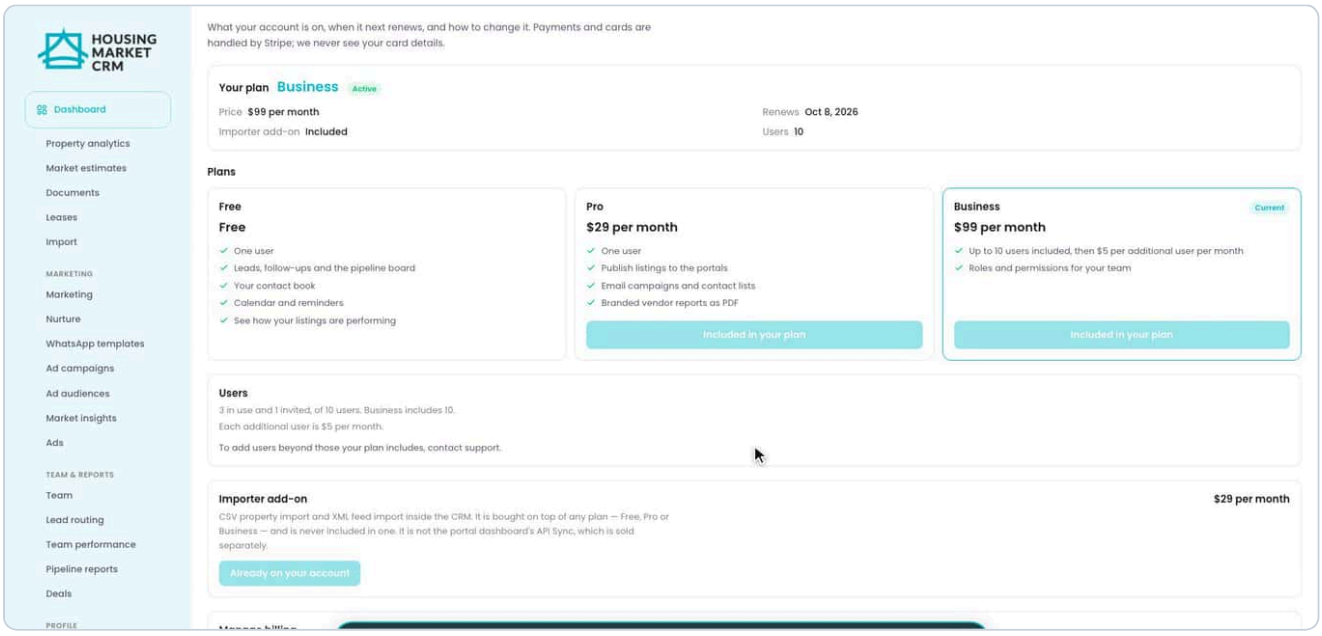


Figure 134.11 · Screen recorded 24 September 2026

12 On **Free** and **Pro** this card offers **Upgrade to Business** instead.

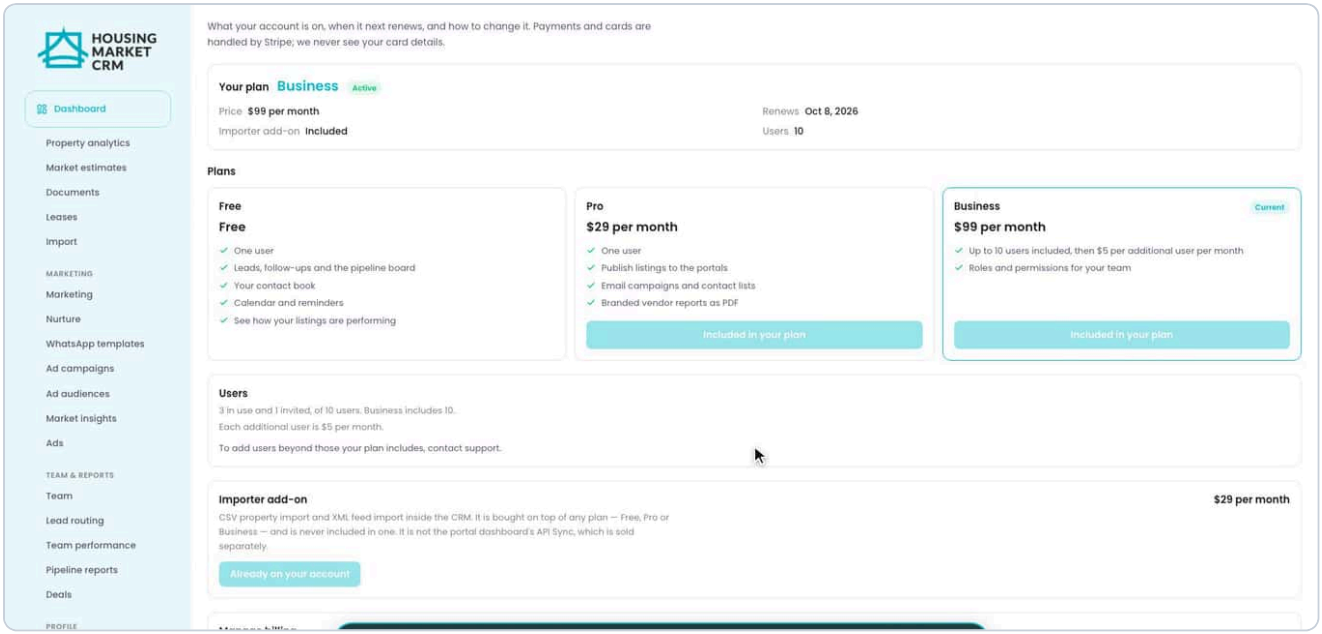


Figure 134.12 · Screen recorded 24 September 2026

GOOD TO KNOW

NOTE

Yes, on the Business plan: up to 10 users included, then 5 USD per additional user per month, with admin, manager and agent roles, assignment rules, and one view across every agent's board.

Help Center: Can multiple team members use the CRM?

PART 11

Marketing tools (Pro and Business)

135 The Marketing Pro tools: a tour

136 Build audience segments

137 Set up automatic email triggers

138 Use the Launch kit

139 Read your marketing results

140 Build a lead form

141 Publish a one-property website

142 Collect a video testimonial

143 The Marketing Business tools: a tour

144 Send a cross-border referral

145 Run a foreign buyer campaign

146 Share a listing with other agents

147 Pro tools: anniversaries and past-client referrals

148 Pro tools: coach and client shortlists

149 Pro tools: local market calendar

150 See your ad results in the Results tab

151 See your social results in the Results tab

152 Recommend a service provider

135 CHAPTER 135

The Marketing Pro tools: a tour

Pro and Business | For agents | Watch the video

OVERVIEW

Under Marketing, Pro tools holds an AI writer, seller presentations, weekly seller reports and a marketing score for each listing. Market and clients adds a market calendar, an area newsletter, anniversary emails, referral links, shortlists and a daily coach.

The Pro marketing tools are part of the Pro and Business plans. On a Free plan the tools are shown as locked, with the way to upgrade. Under Marketing, choose Pro tools, and open the Market and clients tab for the second group.

Pro tools

- AI writer writes a draft in seconds: a listing description, an email about a property or the text of a seller presentation, in any of seventeen languages. Listing descriptions can be written only in the languages your portal publishes. The draft uses only the details you give it and the listing you choose, prices and street addresses are never sent to the writer, and nothing is stored. Read it and correct it before you use it.
- Seller presentations makes a presentation for a seller meeting from one of your live listings: your pitch, a market estimate range from comparable listings, the price you suggest and how you will market the property. Print it or save it as a PDF in the seller's language. The market estimate is a snapshot of the day you made it, and when there are too few similar listings nearby the presentation says so instead of guessing.
- Seller reports keeps the owner of a listing informed with an email every Monday with the week's views, enquiries and viewings, and a live page they can open at any time with a link that you can replace. You first confirm that the seller asked for the report. Nothing is sent to someone who unsubscribed.
- Marketing score gives one of your live listings a score out of 100 from its photos, video and tour, description, details, price against the market estimate and views, and lists the few things that would raise it. A part that cannot be judged yet is left out instead of counting as zero.

Market and clients

- Market calendar has ready-made greetings for the key dates of a market, already written in every language. Pick a date, check the words, choose who gets it and when, and it is sent for you on the day. Nothing goes out without your confirmation.
- Area newsletter sends the people in one of your saved segments, once a month, the market figures of one district from Housing Market Insights with a few of your own live homes below. It is never sent twice in a month and never when there is too little data behind the figures.
- Anniversaries writes to each client on the anniversary of the day they got their home, with a short market estimate when we can stand behind one.
- Referral links gives each past client their own link. Anyone who opens it lands on your profile page, and an enquiry made within 30 days arrives as a lead with the source Referral. You see how many people opened each link, how many enquiries came through it and how many became deals.
- Shortlists puts some of your live homes behind one link that you send to a buyer. To open a home's page, the visitor gives you their name and email.
- Coach suggests three things worth doing today, picked from your own marketing. Nothing is sent for you.

Every email from these tools goes only to people you are allowed to write to, and each follows the same unsubscribe rules as your campaigns.

From the Help Center: **What are the Pro marketing tools?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

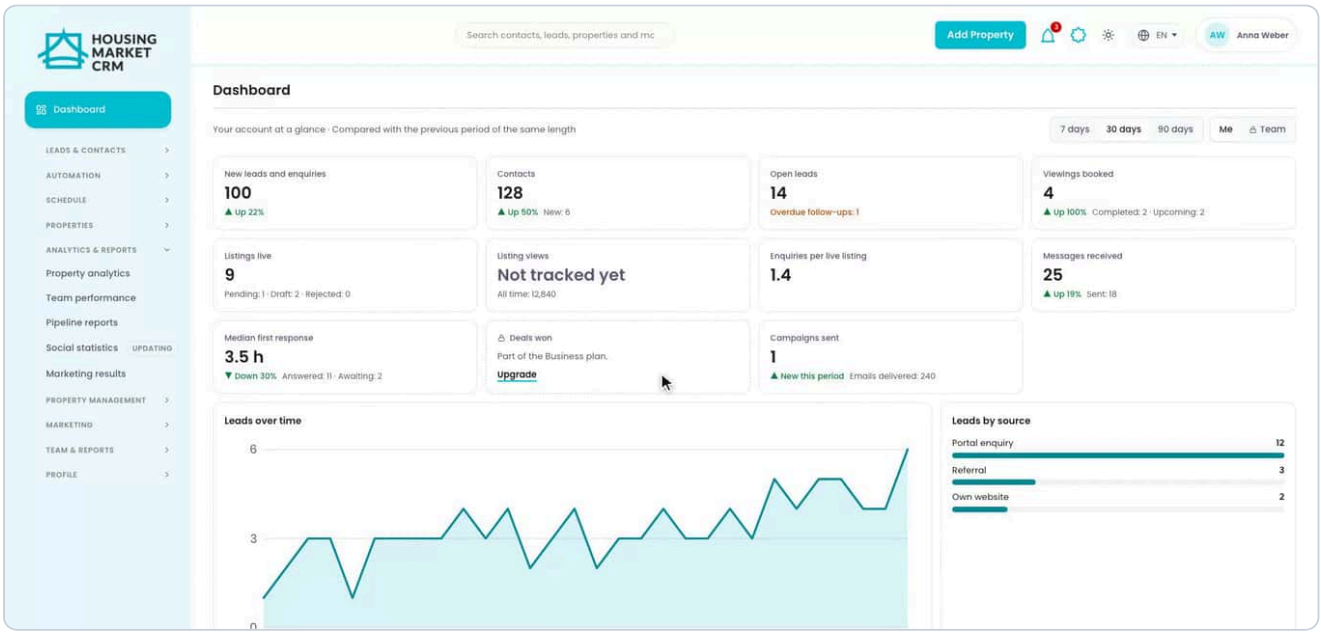


Figure 135.1 · Screen recorded 29 October 2026

2 Open the **Marketing** group in the left menu.

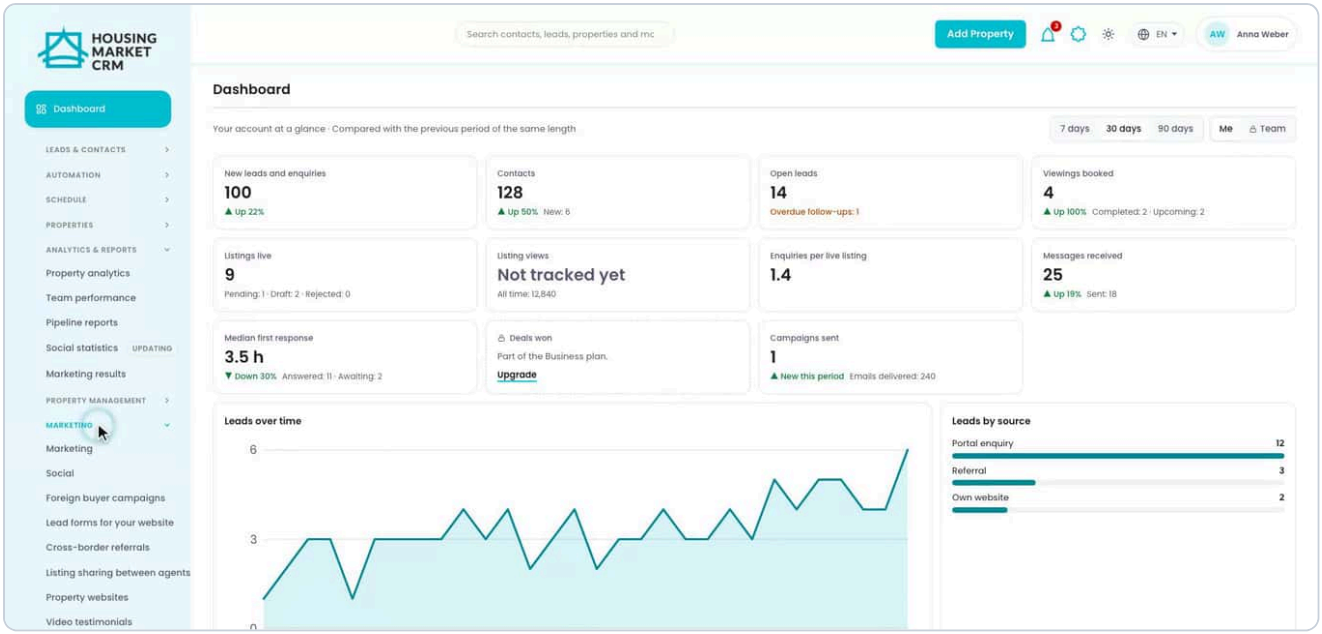


Figure 135.2 · Screen recorded 29 October 2026

3 Click **Marketing**.

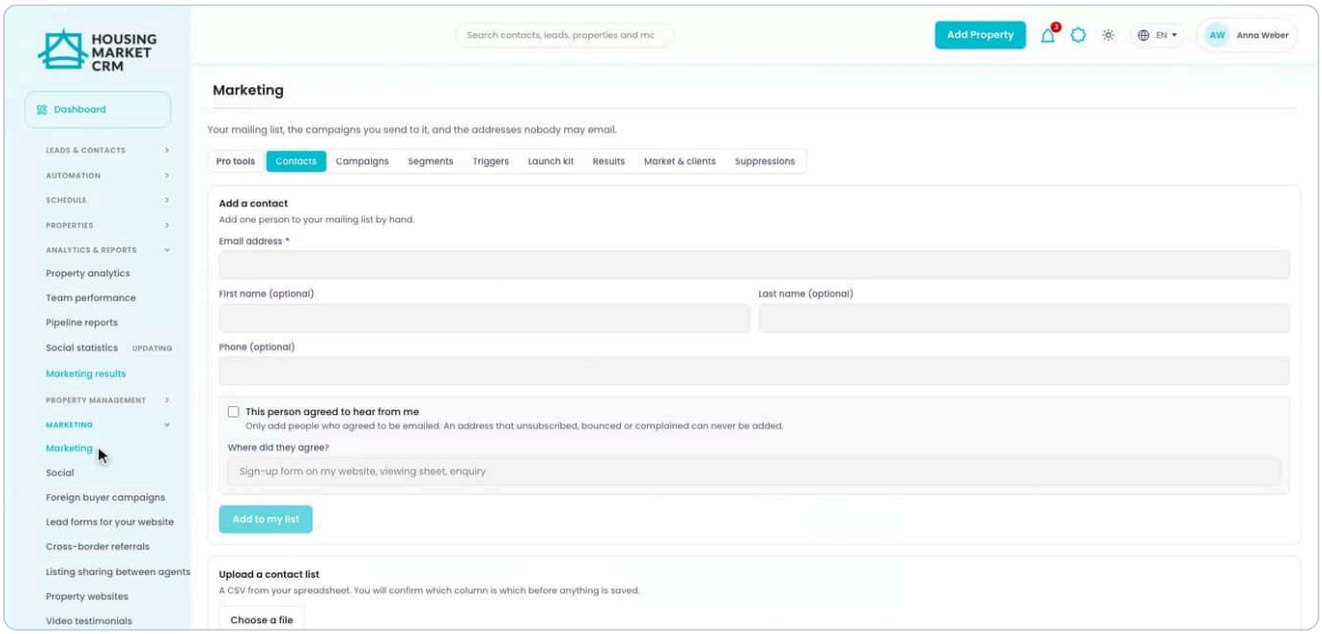


Figure 135.3 · Screen recorded 29 October 2026

4 The Pro marketing tools open from the **Pro tools** link.

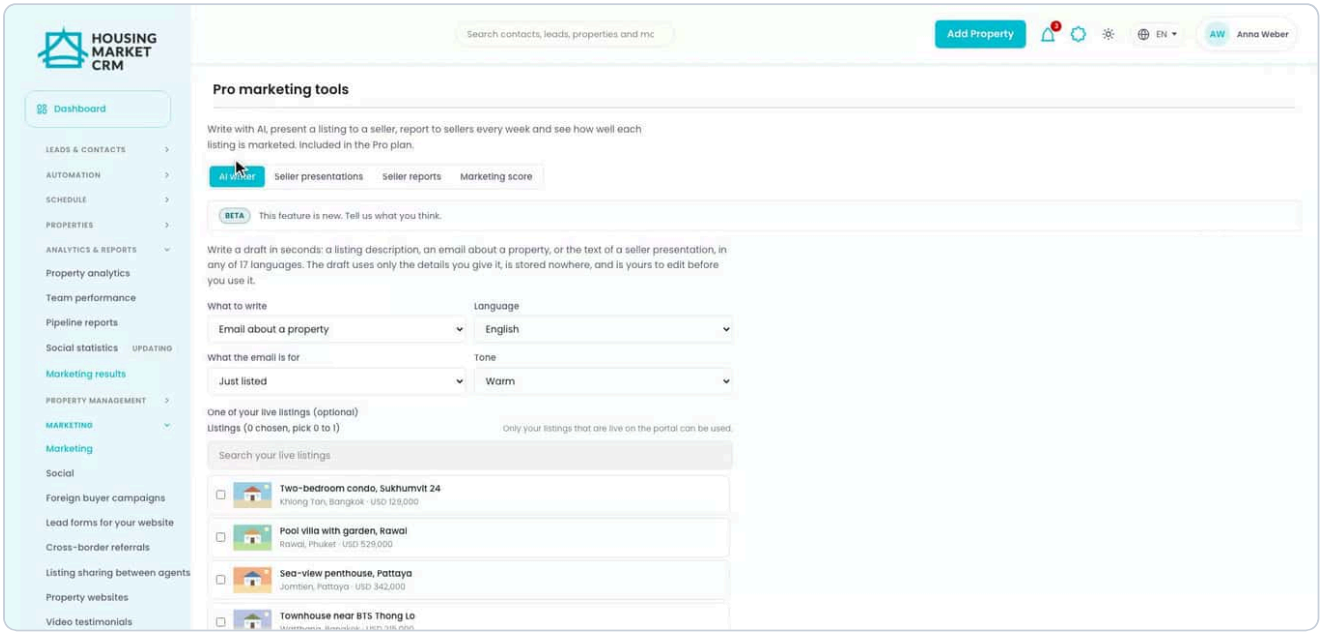


Figure 135.4 · Screen recorded 29 October 2026

5 The hub has **four tabs**, one for each tool.

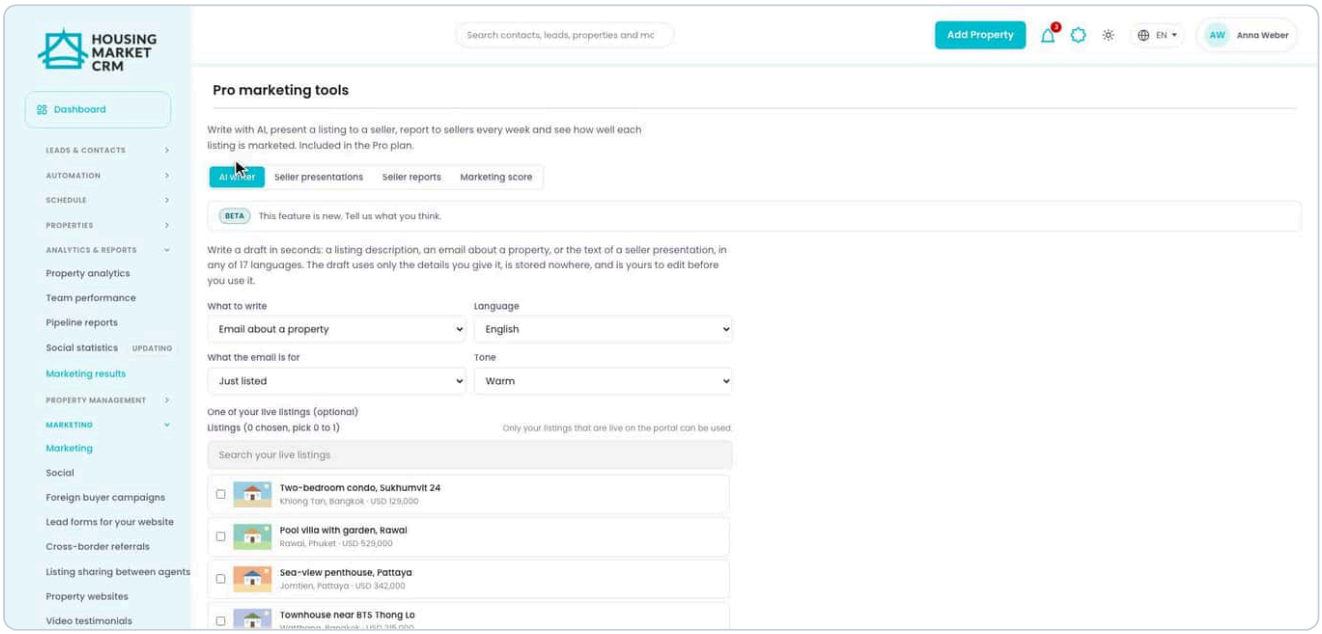


Figure 135.5 · Screen recorded 29 October 2026

6 These tools are new and show a **Beta** badge while we refine them.

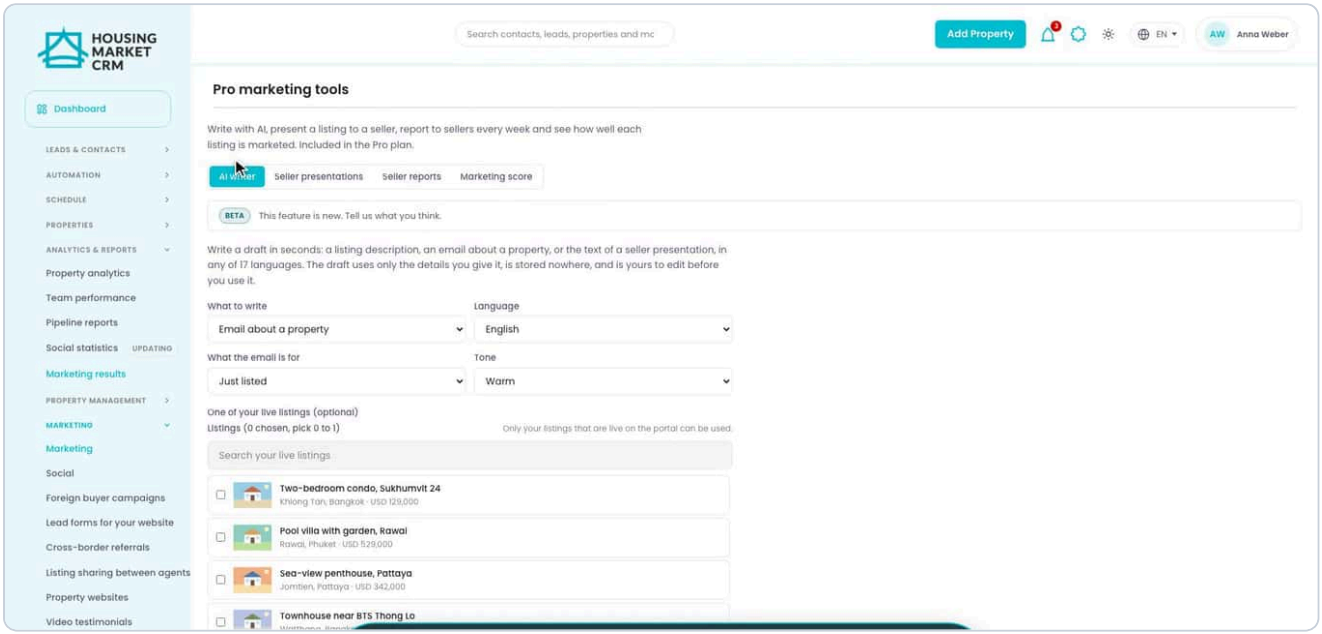


Figure 135.6 · Screen recorded 29 October 2026

7 The **AI writer** drafts text from the details you give it.

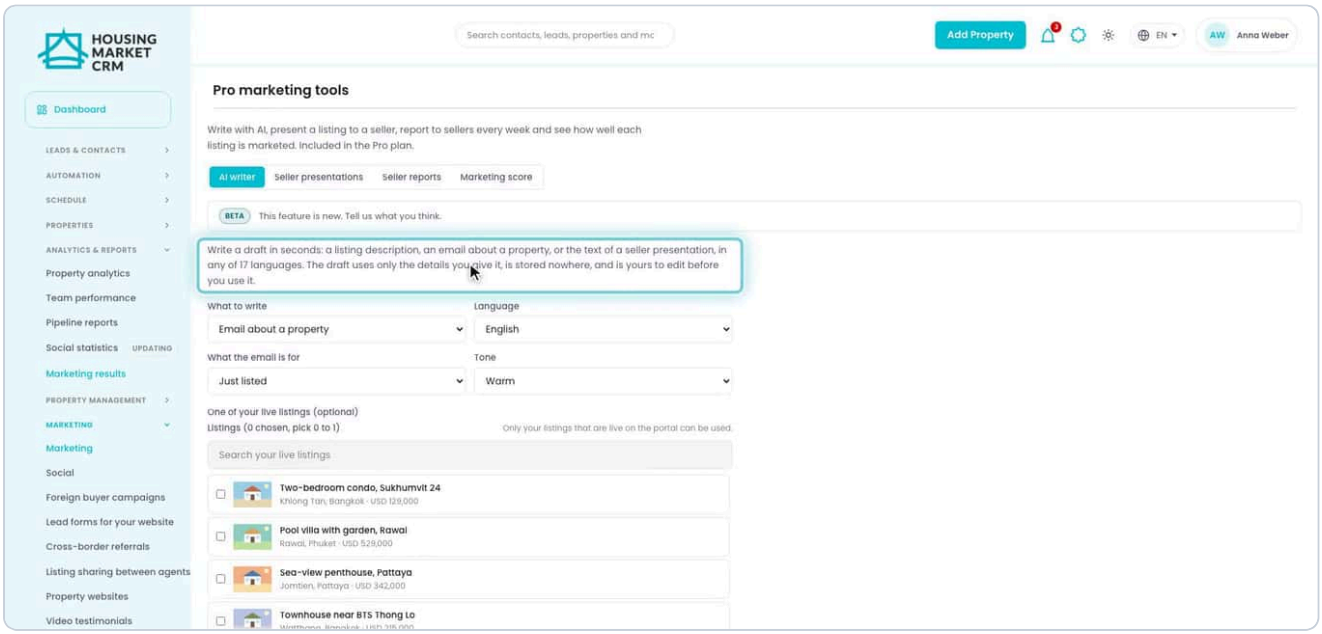


Figure 135.7 · Screen recorded 29 October 2026

8 Choose one of your live listings.

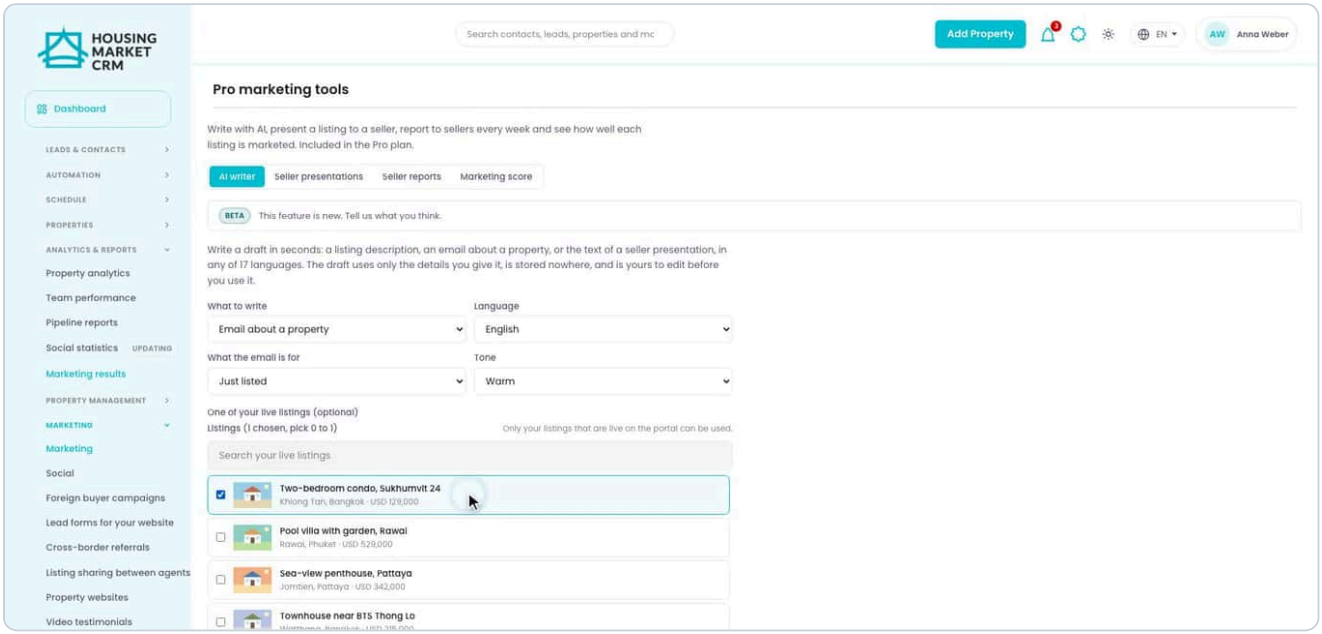


Figure 135.8 · Screen recorded 29 October 2026

9 Click **Write a draft**.

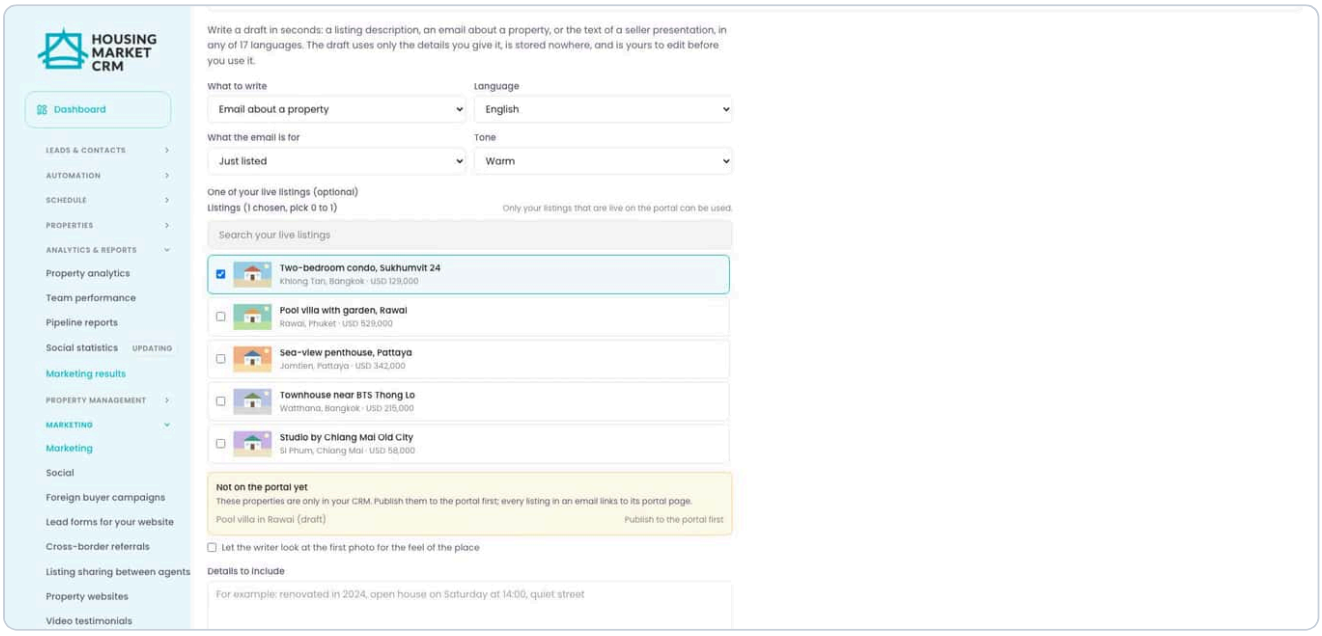


Figure 135.9 · Screen recorded 29 October 2026

10 Read it, edit it, and add your own details before you use it.

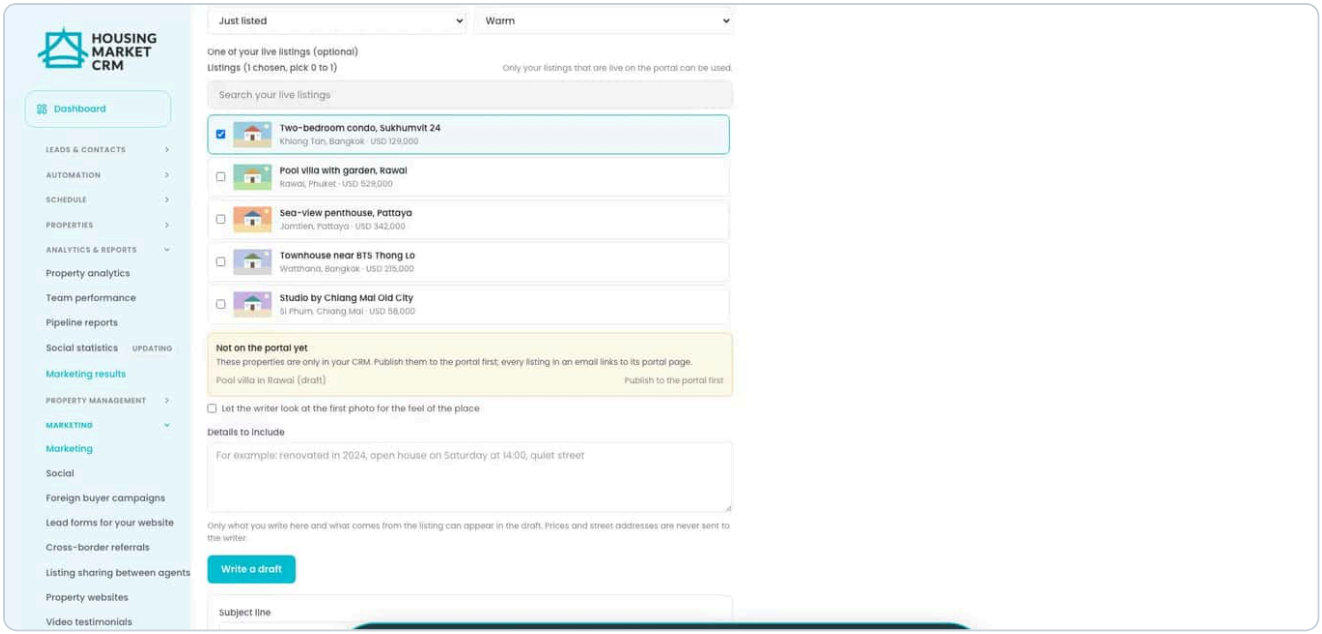


Figure 135.10 · Screen recorded 29 October 2026

11 Open **Seller presentations**.

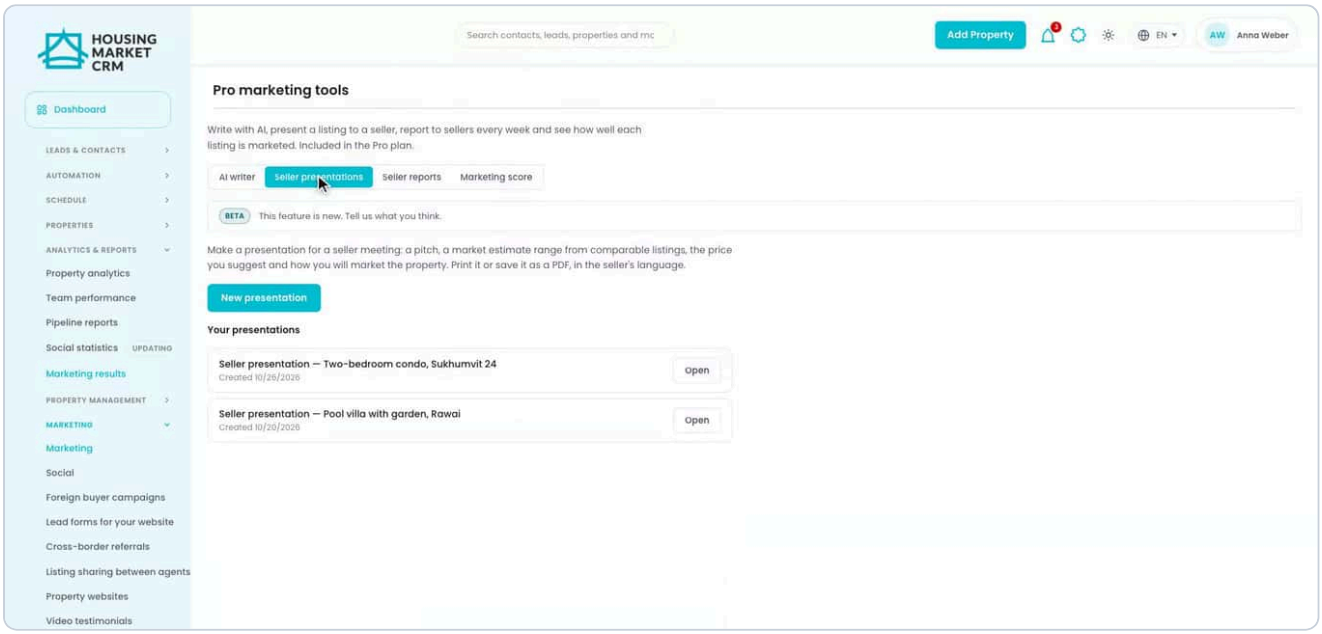


Figure 135.11 · Screen recorded 29 October 2026

12 Make a presentation for a **seller meeting**: pitch, market estimate and suggested price.

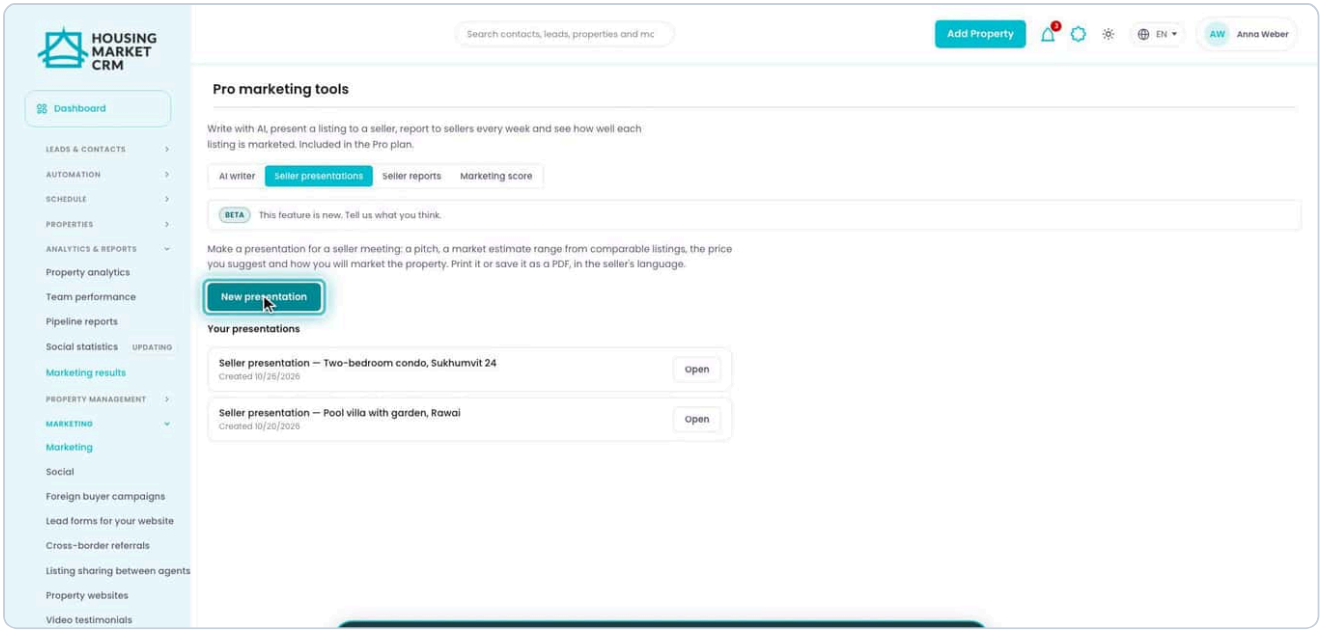


Figure 135.12 · Screen recorded 29 October 2026

13 Each one is saved here, and prints or saves as a PDF in the seller's language.

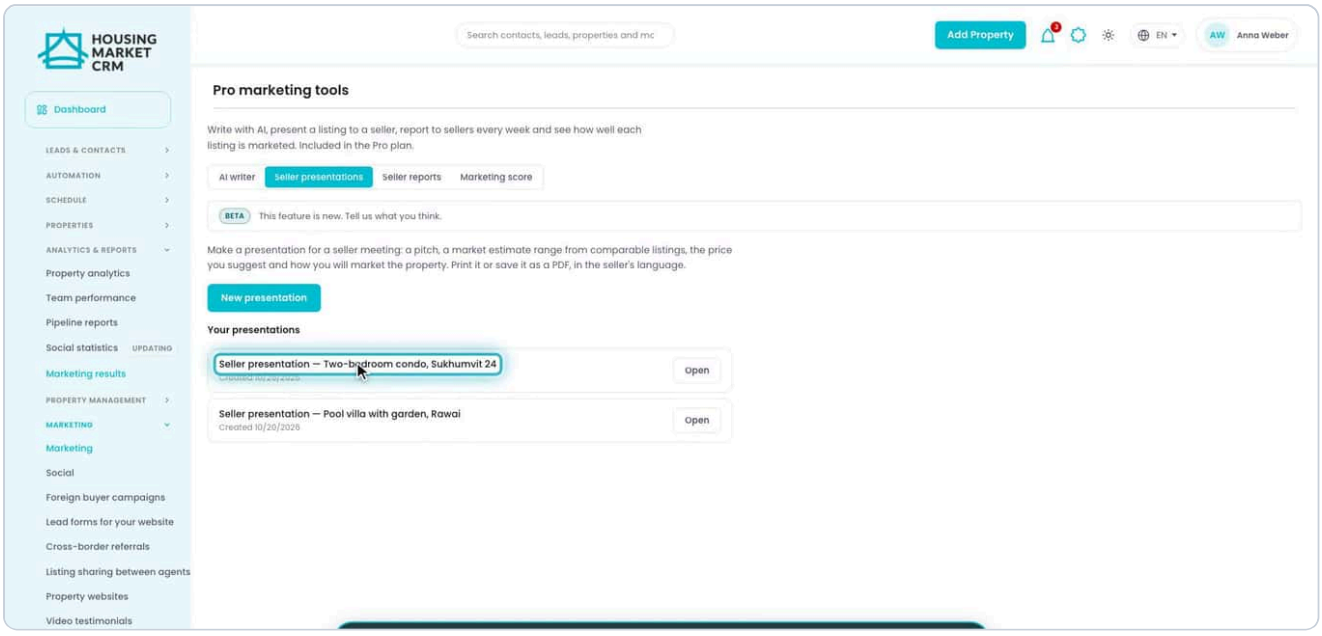


Figure 135.13 · Screen recorded 29 October 2026

14 Open **Seller reports**.

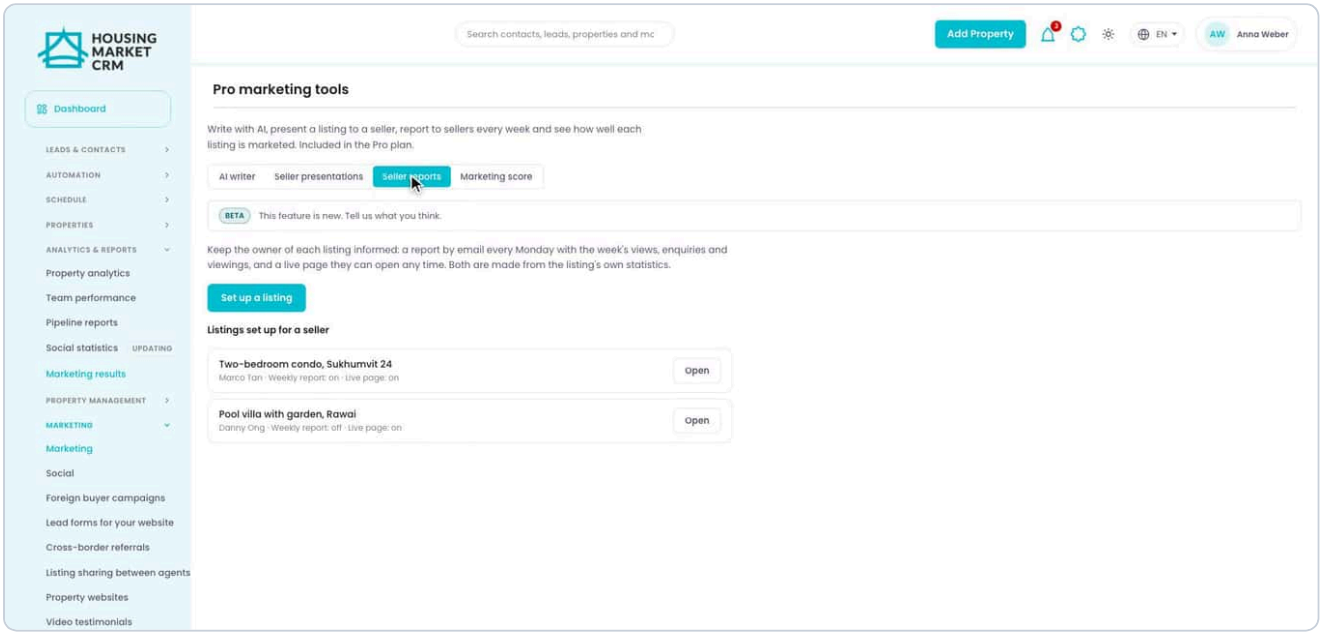


Figure 135.14 · Screen recorded 29 October 2026

15 Keep each owner informed: a **weekly report** by email and a **live page** they can open any time.

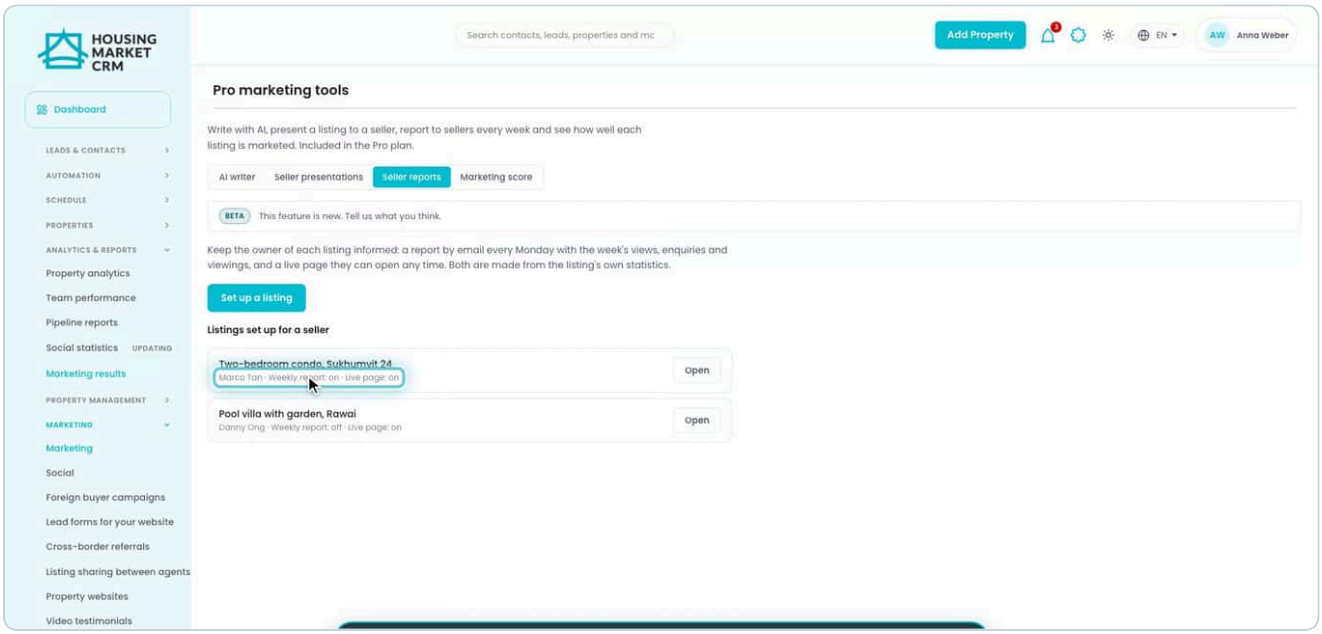


Figure 135.15 · Screen recorded 29 October 2026

16 Open **Marketing score**.

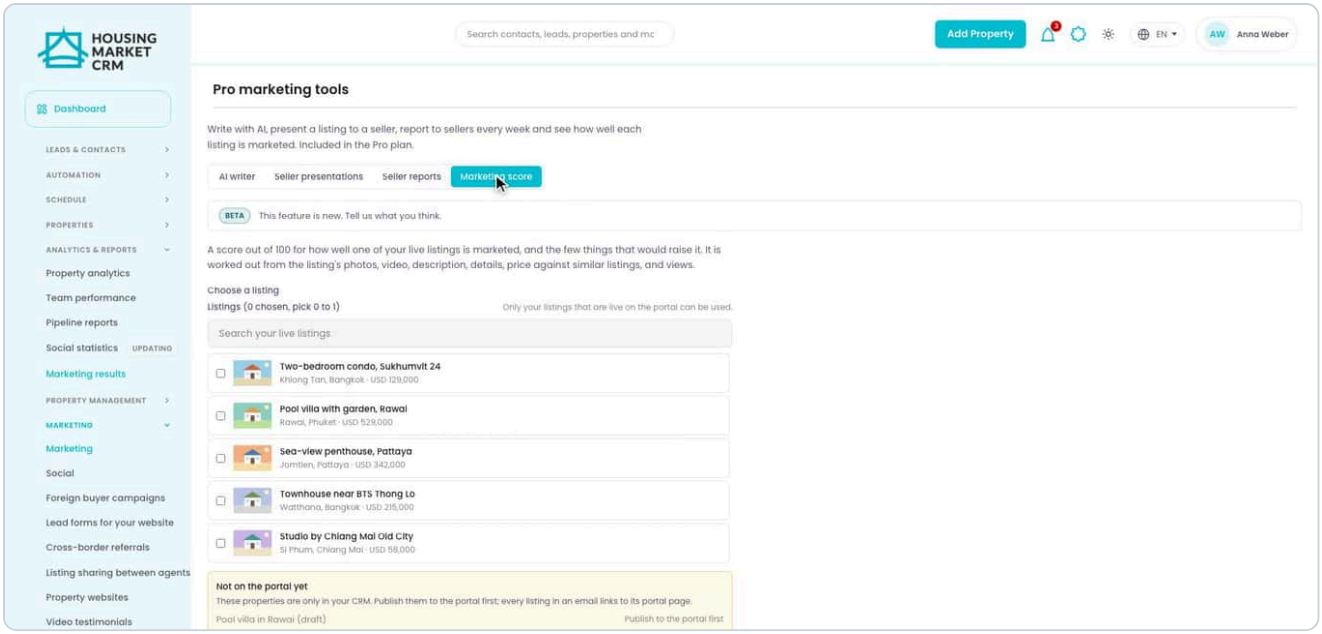


Figure 135.16 · Screen recorded 29 October 2026

17 Choose a live listing.

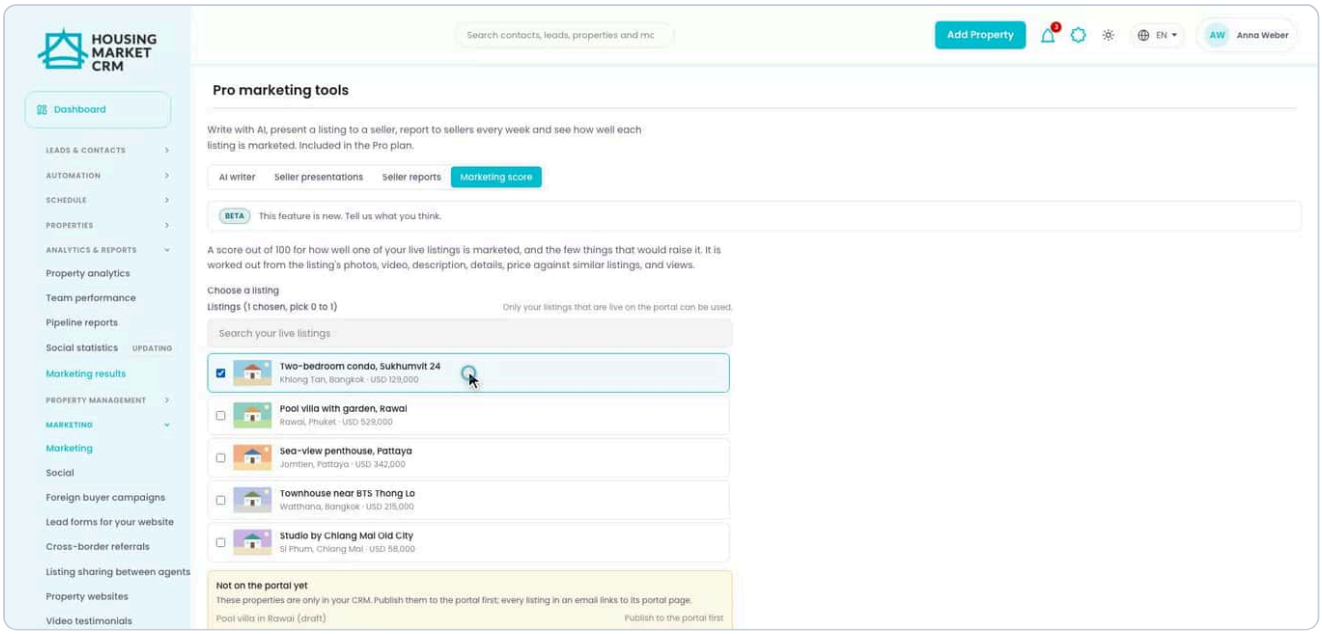


Figure 135.17 · Screen recorded 29 October 2026

18 You get a **score out of 100** and the few things that **would raise it**.

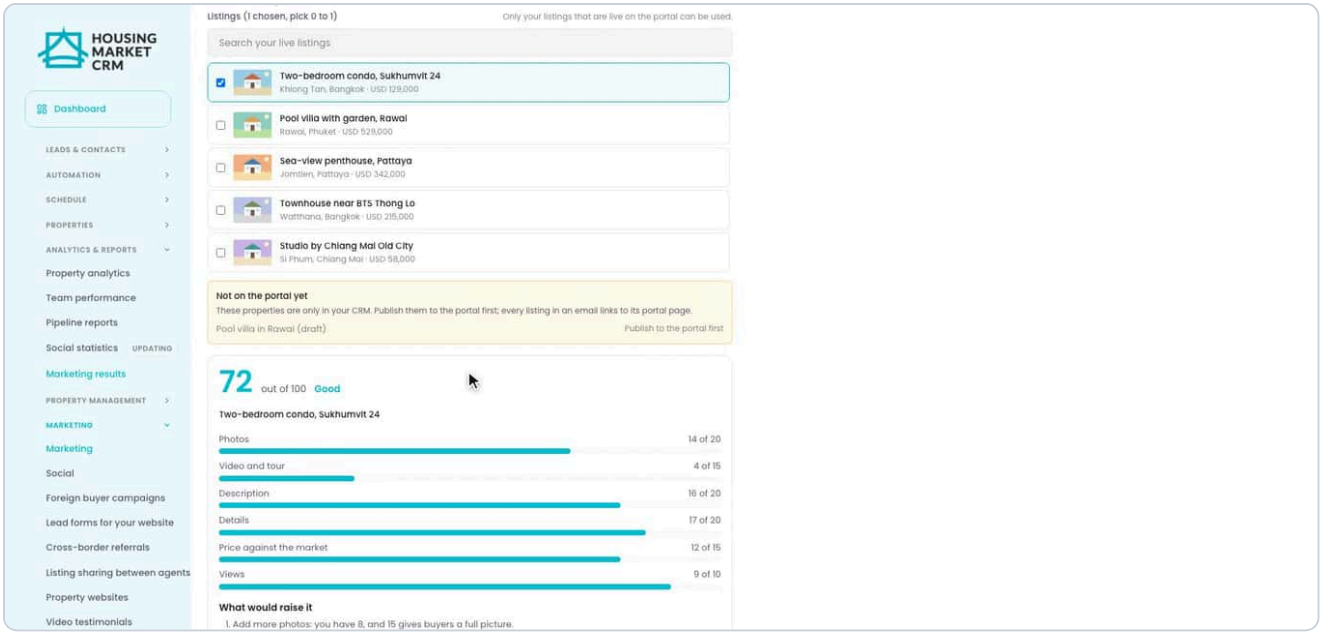


Figure 135.18 · Screen recorded 29 October 2026

19 Lead forms, property websites and video testimonials are Pro tools too.

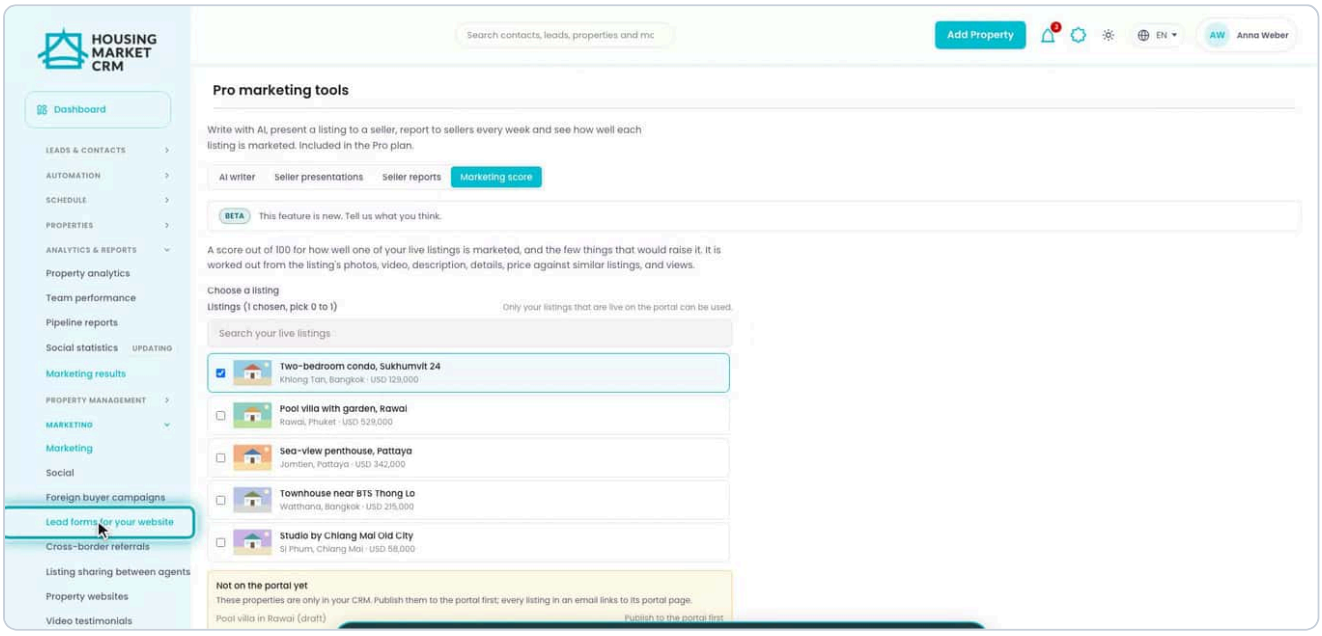


Figure 135.19 · Screen recorded 29 October 2026

20 Each one has its own tutorial.

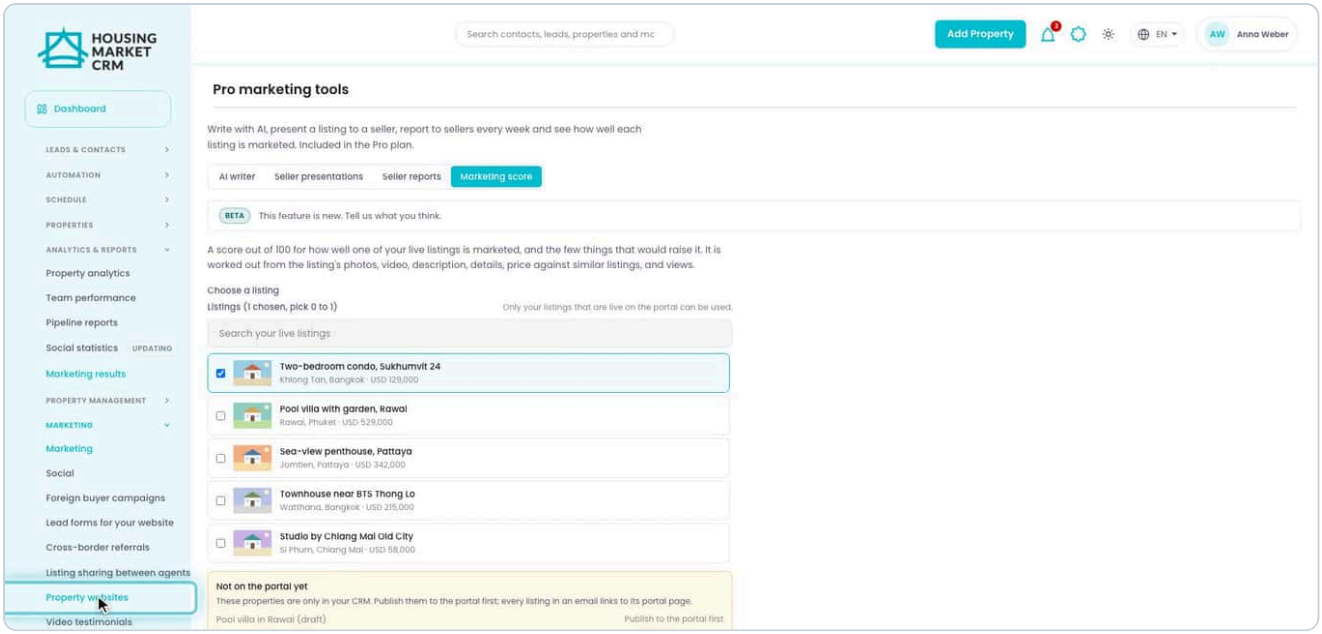


Figure 135.20 · Screen recorded 29 October 2026

21 A **Market and clients** tab on Marketing holds six more tools.

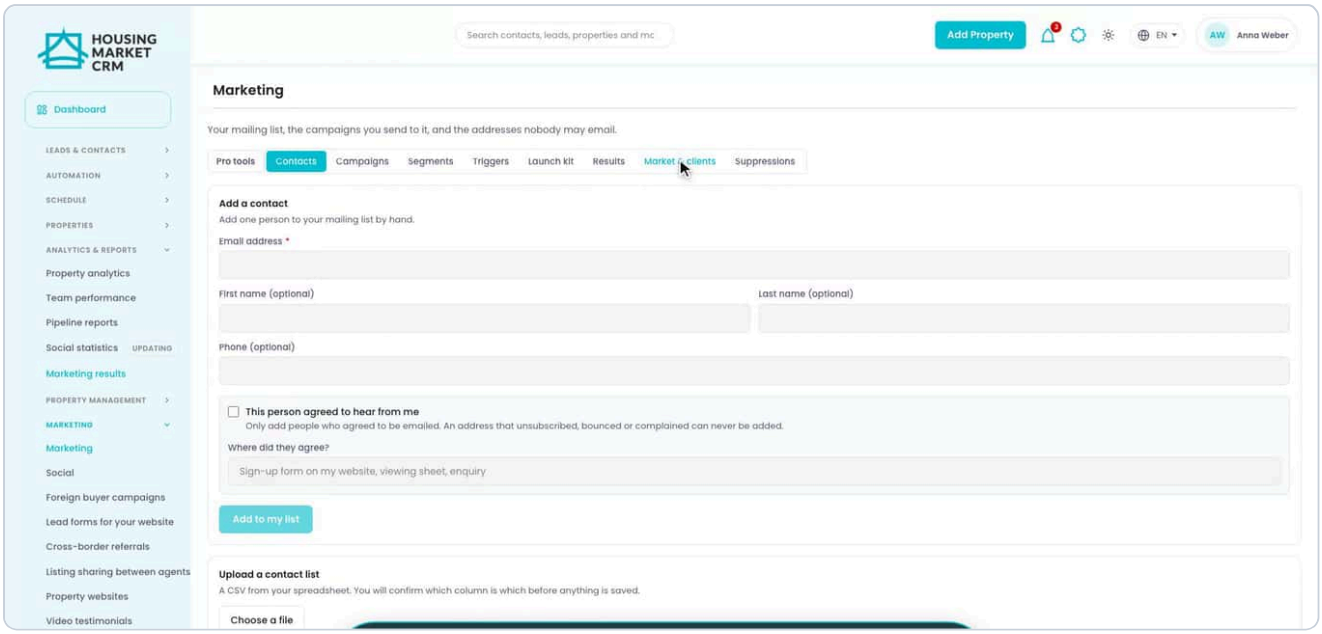


Figure 135.21 · Screen recorded 29 October 2026

136 CHAPTER 136

Build audience segments

Pro and Business | For agents | Watch the video

OVERVIEW

A segment is a saved description of the people you want to write to, for example by budget, area, type of property, last contact or lead score. It is part of Pro.

Open Marketing and then Segments. Name the segment and add conditions: each condition narrows the group, and an optional second list adds alternatives, such as two different areas.

- The area they are looking in
- Budget range, in one currency (amounts in different currencies are never compared)
- Type of property, and buying or renting
- Bedrooms wanted
- Time since the last contact
- Lead score, which needs lead scoring
- Tags, and where the contact came from
- Whether they have an open lead, and the state of their deals

Count the people to see how many match and how many can be emailed. The count also says why the others cannot be: no usable address, unsubscribed from your emails, on the suppression list after a bounce or complaint, sharing an address with another contact, or in a market where the law requires a recorded opt-in first. A person your account already emailed today is not dropped; they receive the campaign tomorrow.

Send a campaign to a segment from the same screen. For each send you confirm that the people asked you to write to them or have a relationship with you that allows it. A segment is read when you send, so it never holds a list of addresses, and nobody receives more than one marketing email a day from your account. Archiving a segment is for managers and administrators, and it keeps the history of the campaigns sent to it.

From the Help Center: **What are smart segments?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

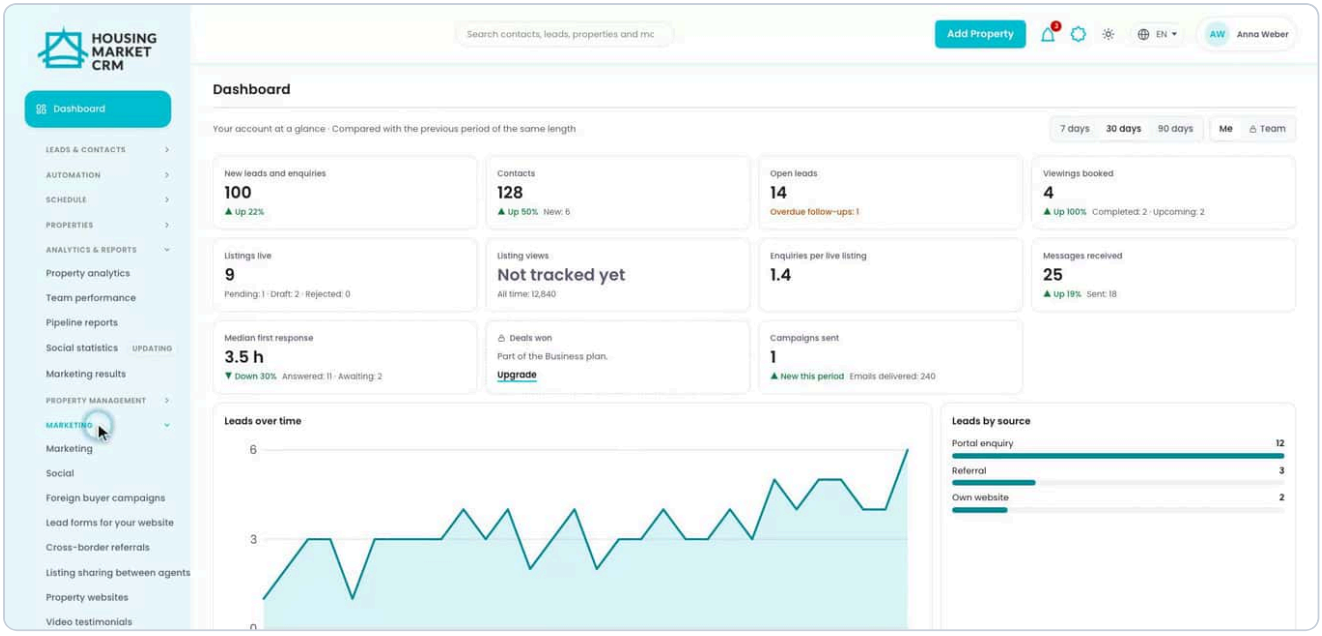


Figure 136.1 · Screen recorded 29 October 2026

2 Click **Marketing**.

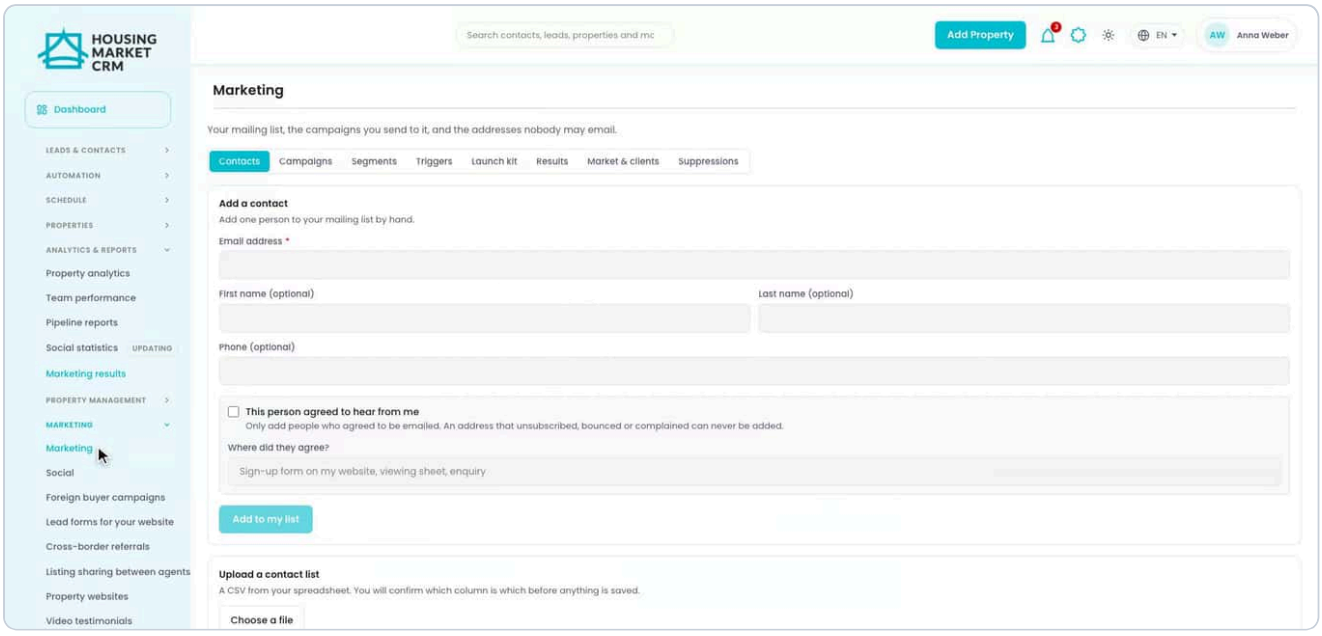


Figure 136.2 · Screen recorded 29 October 2026

3 Open the **Segments** tab.

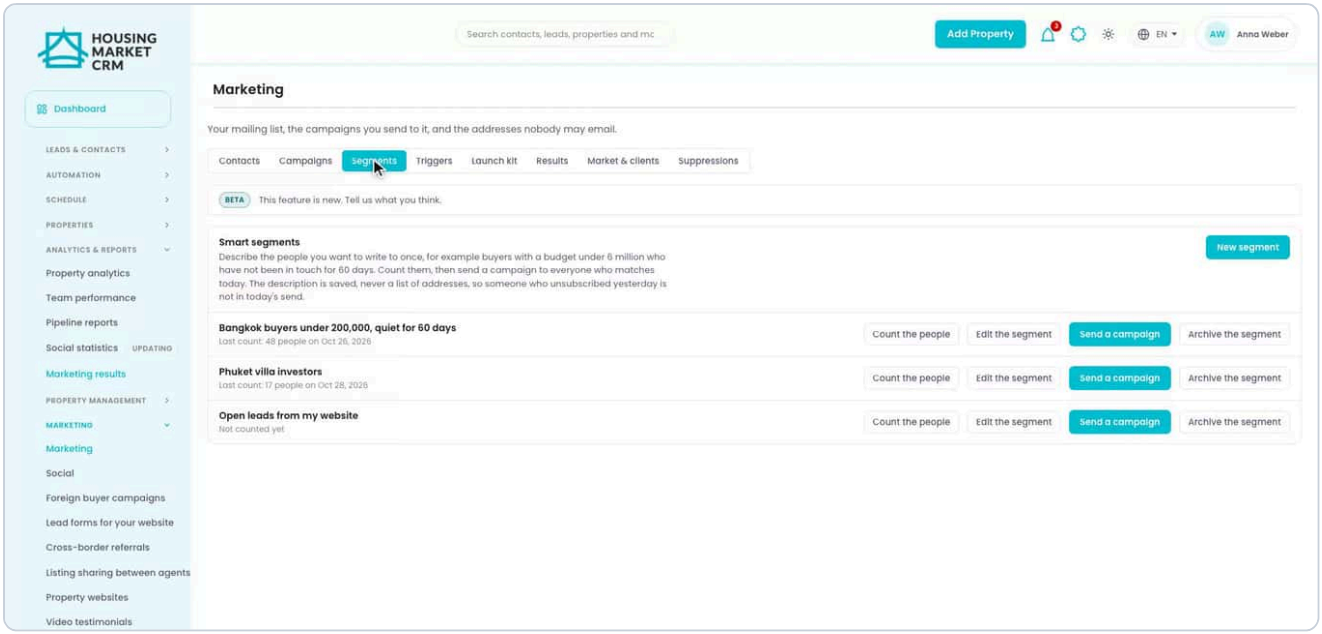


Figure 136.3 · Screen recorded 29 October 2026

4 This feature is new and shows a **Beta** badge while we refine it.

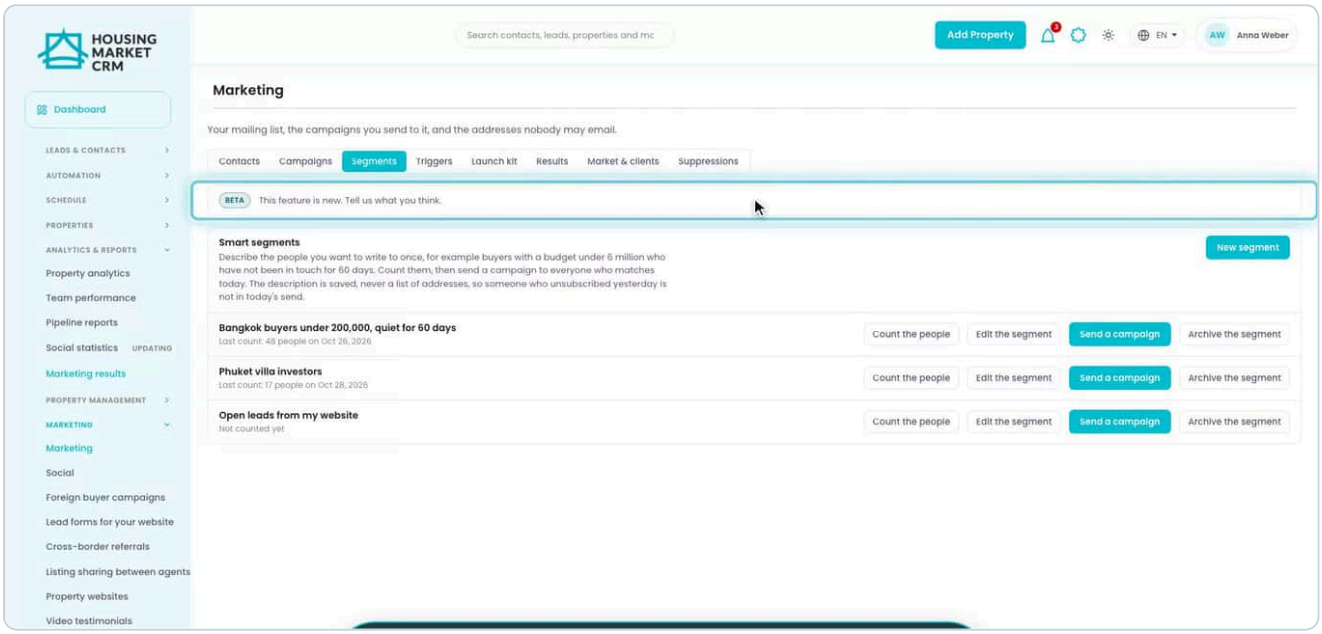


Figure 136.4 · Screen recorded 29 October 2026

5 A segment is **a saved description**. Never a list of addresses.

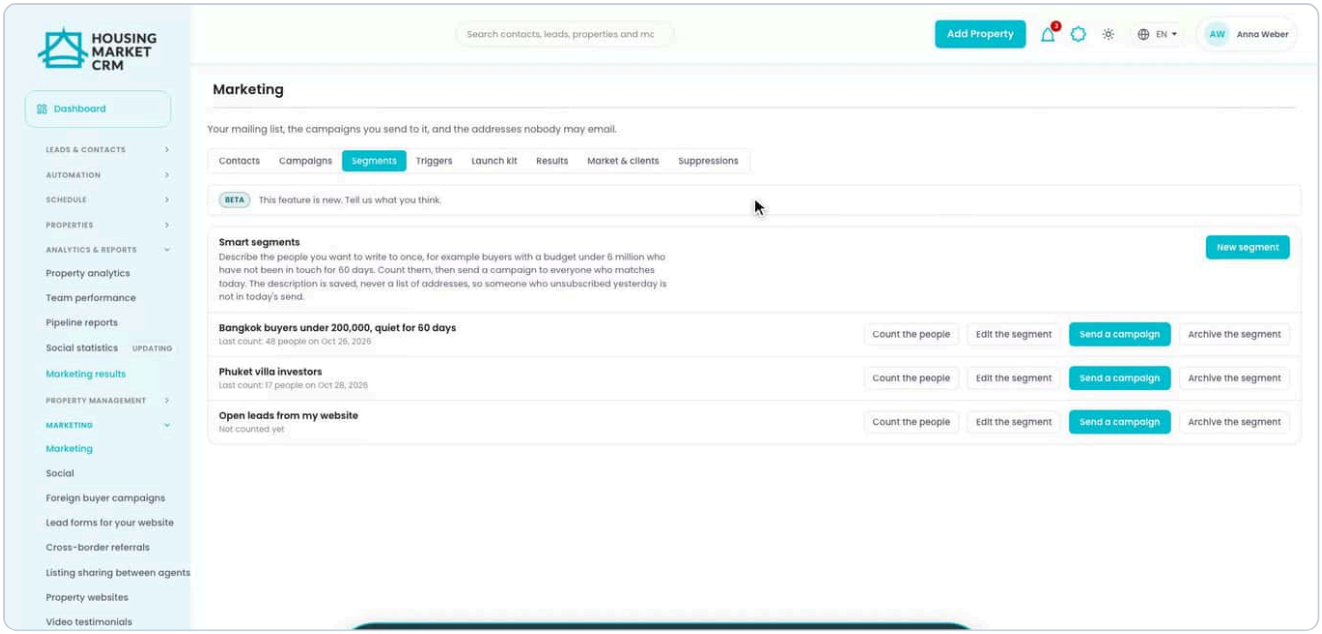


Figure 136.5 · Screen recorded 29 October 2026

6 Click **Count the people** on a saved segment.

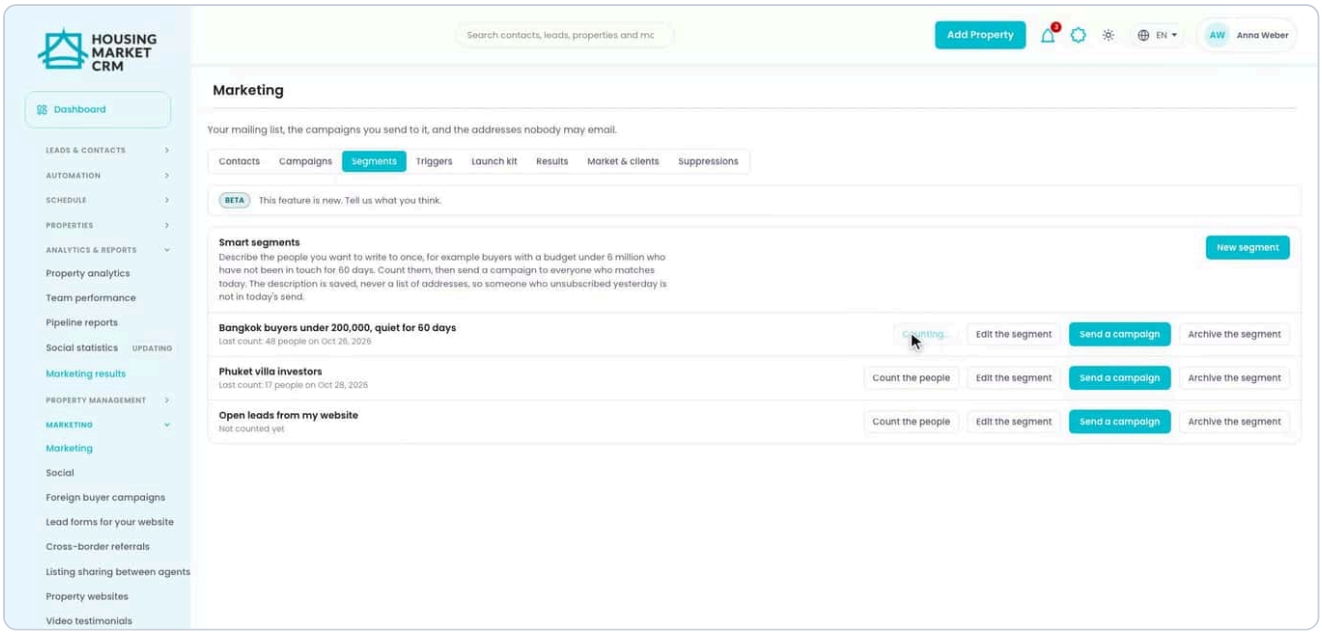


Figure 136.6 · Screen recorded 29 October 2026

7 It shows **how many people match** and **how many of them can be emailed**.

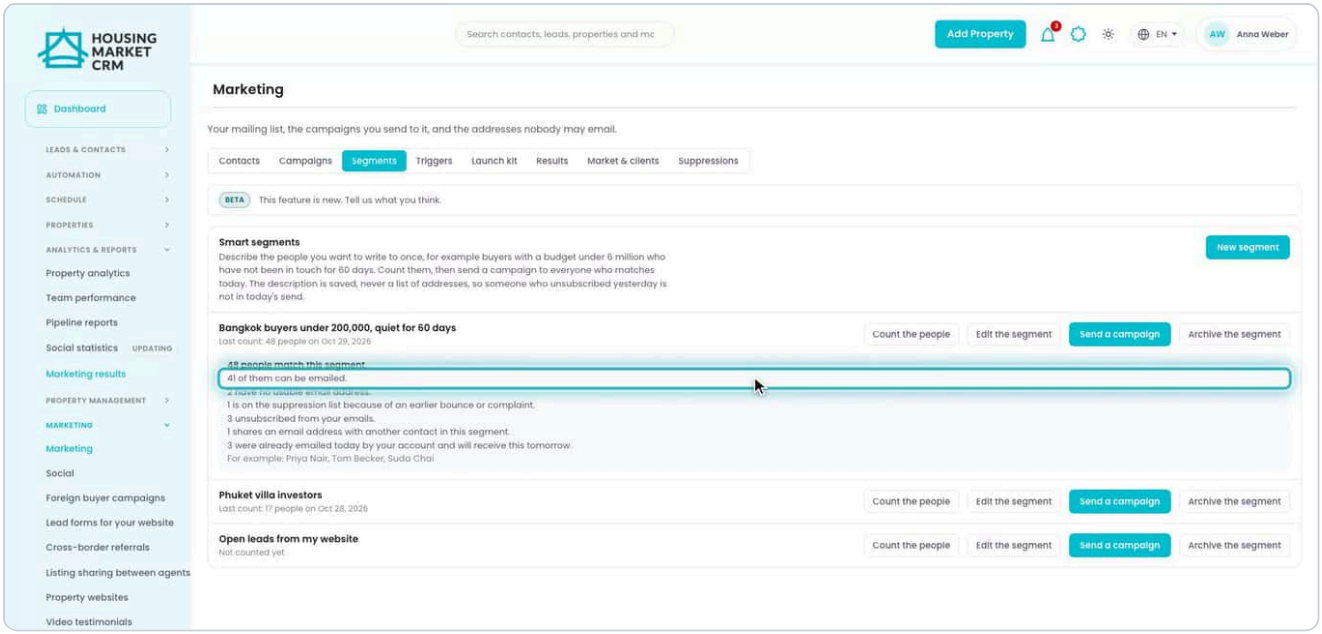


Figure 136.7 · Screen recorded 29 October 2026

8 People who **unsubscribed**, bounced or share an address are left out for you.

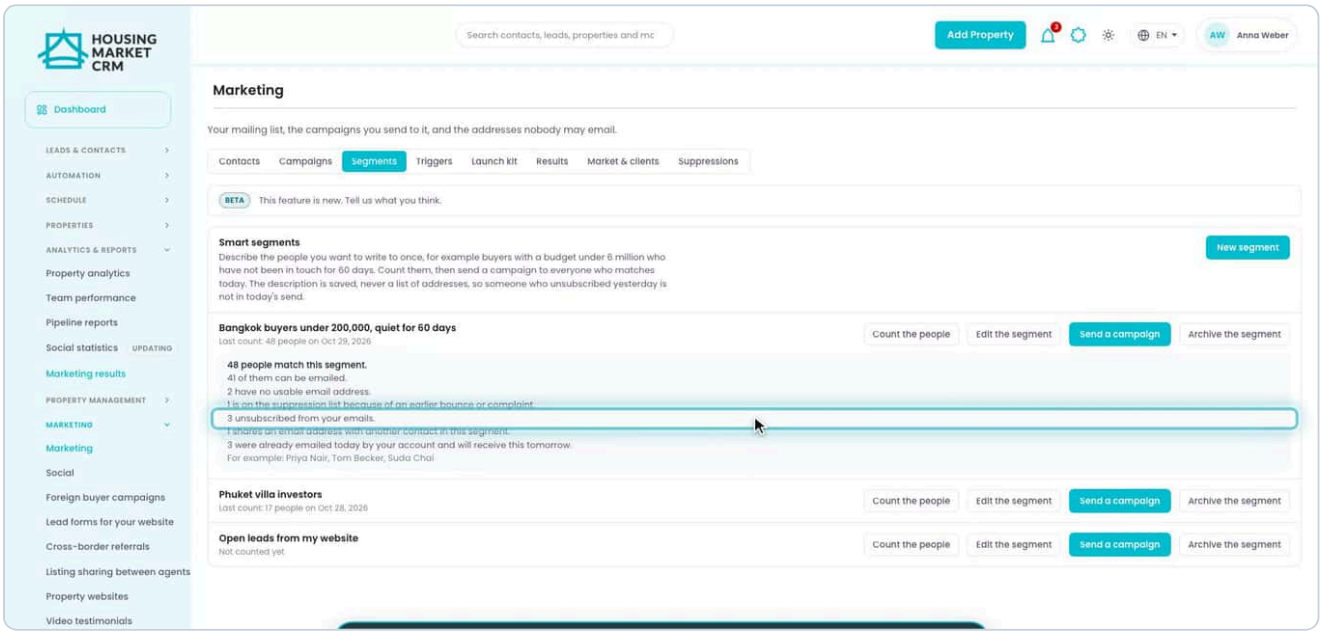


Figure 136.8 · Screen recorded 29 October 2026

9 Click **New segment**.

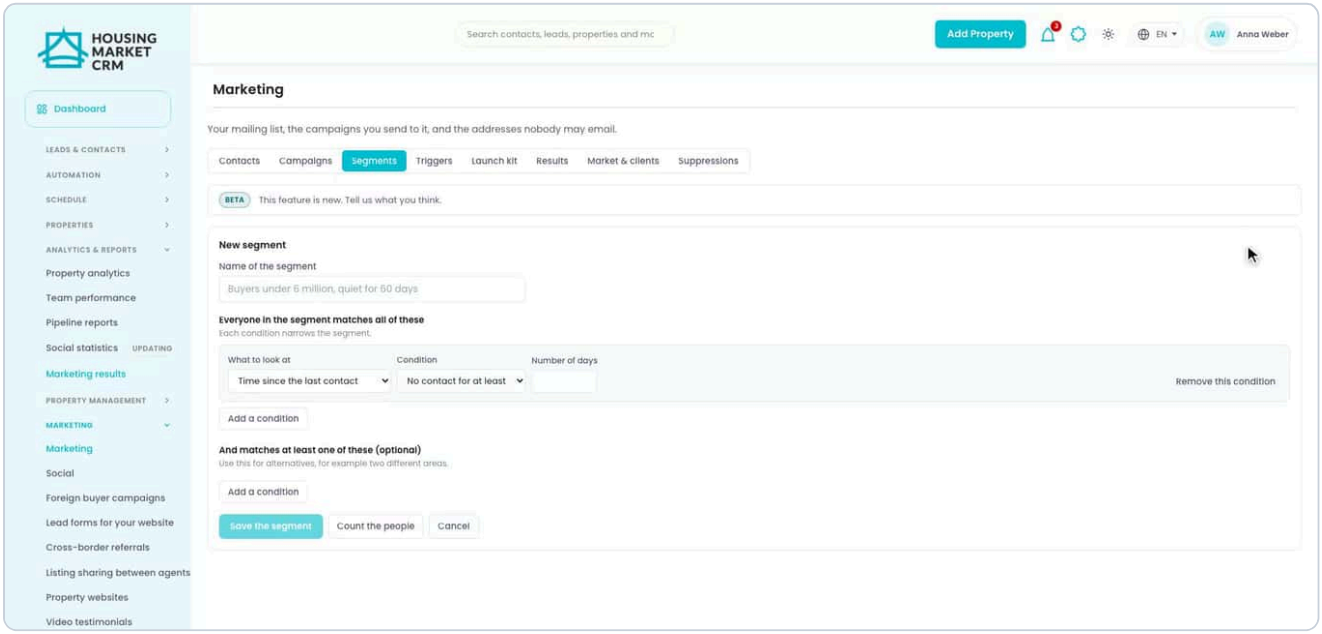


Figure 136.9 · Screen recorded 29 October 2026

10 Give the segment a **name** only you see.

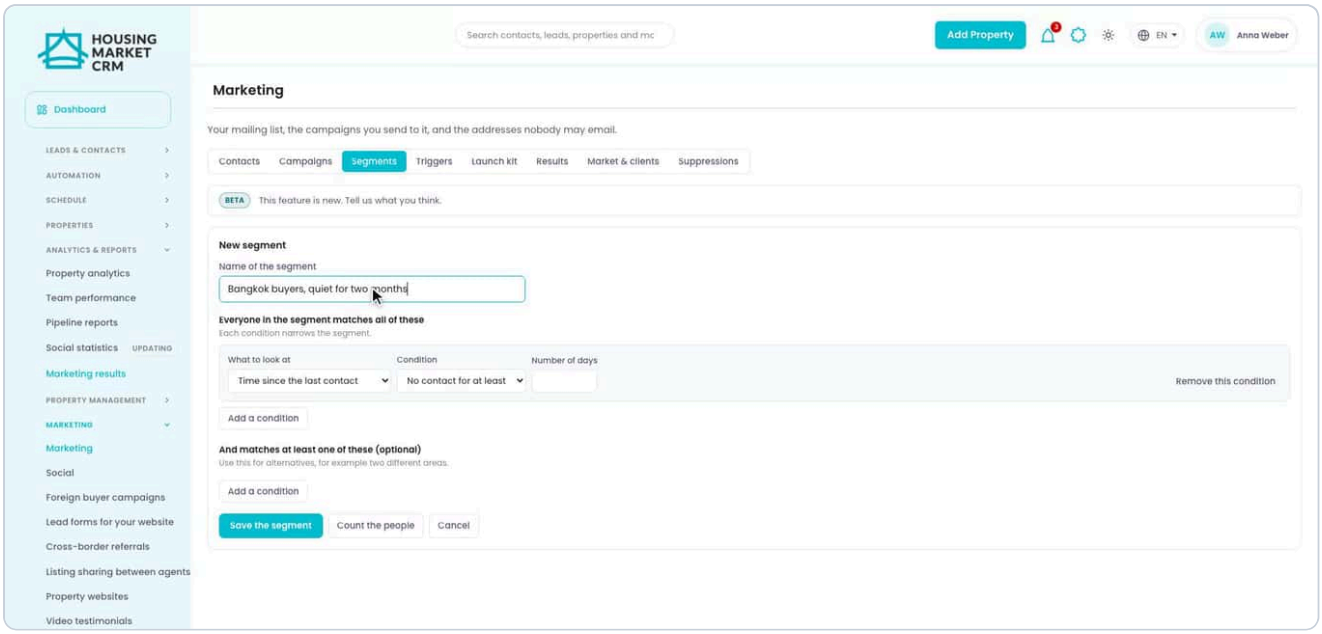


Figure 136.10 · Screen recorded 29 October 2026

11 Everyone in the segment must match **all** of these.

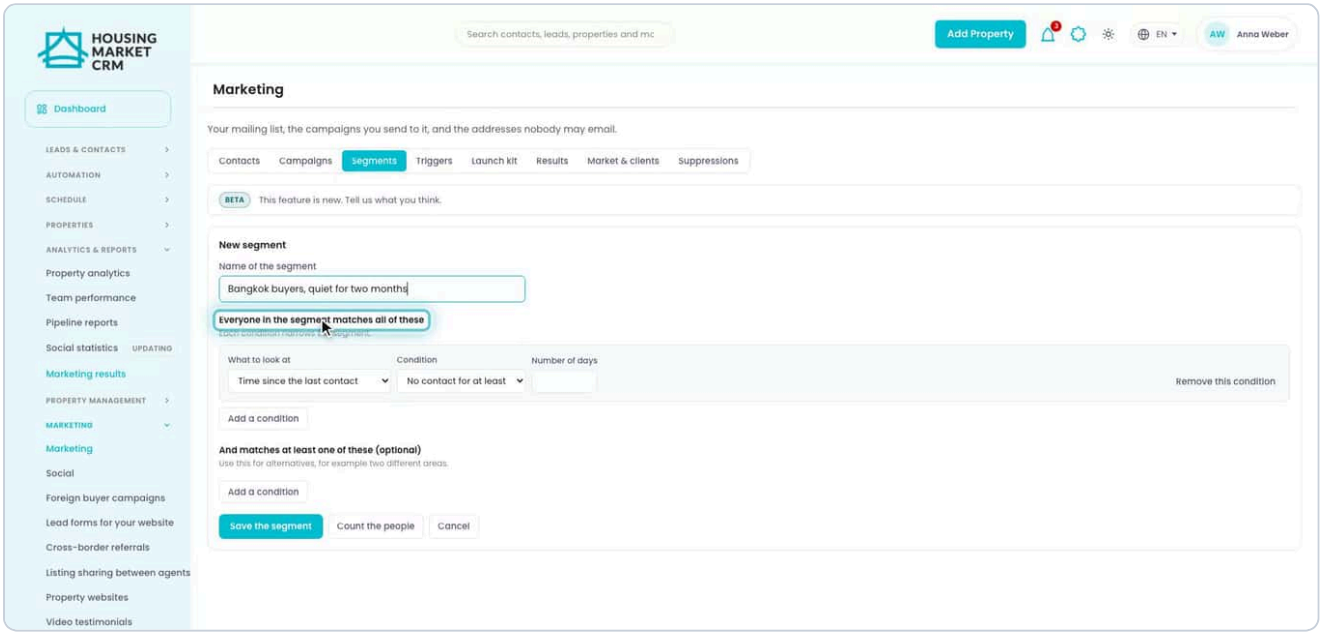


Figure 136.11 · Screen recorded 29 October 2026

12 The first condition is **no contact for at least 60 days**.

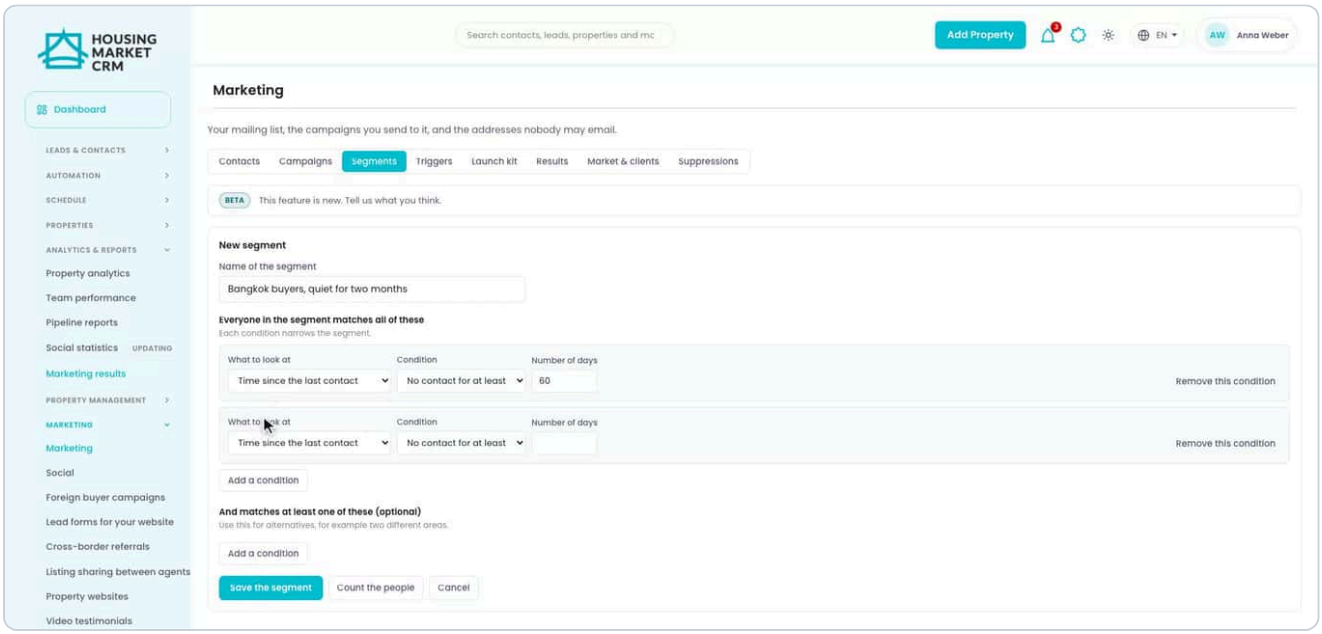


Figure 136.12 · Screen recorded 29 October 2026

13 Choose **Budget range**.

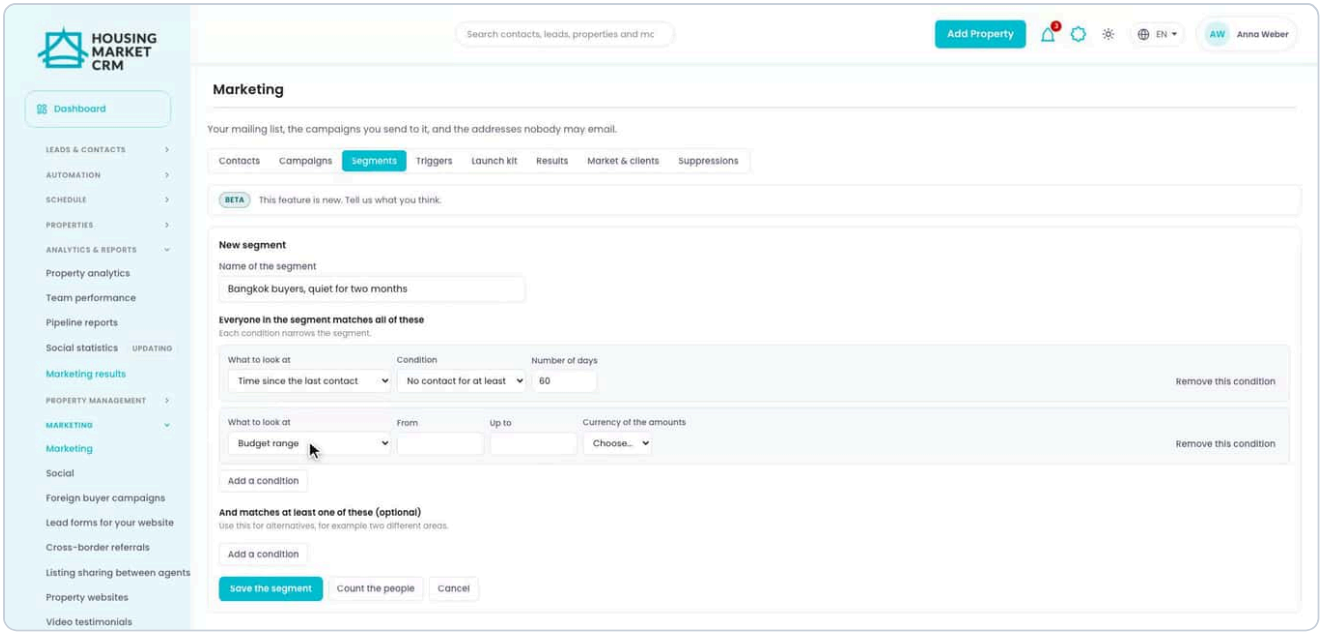


Figure 136.13 · Screen recorded 29 October 2026

14 Enter the **highest** amount.

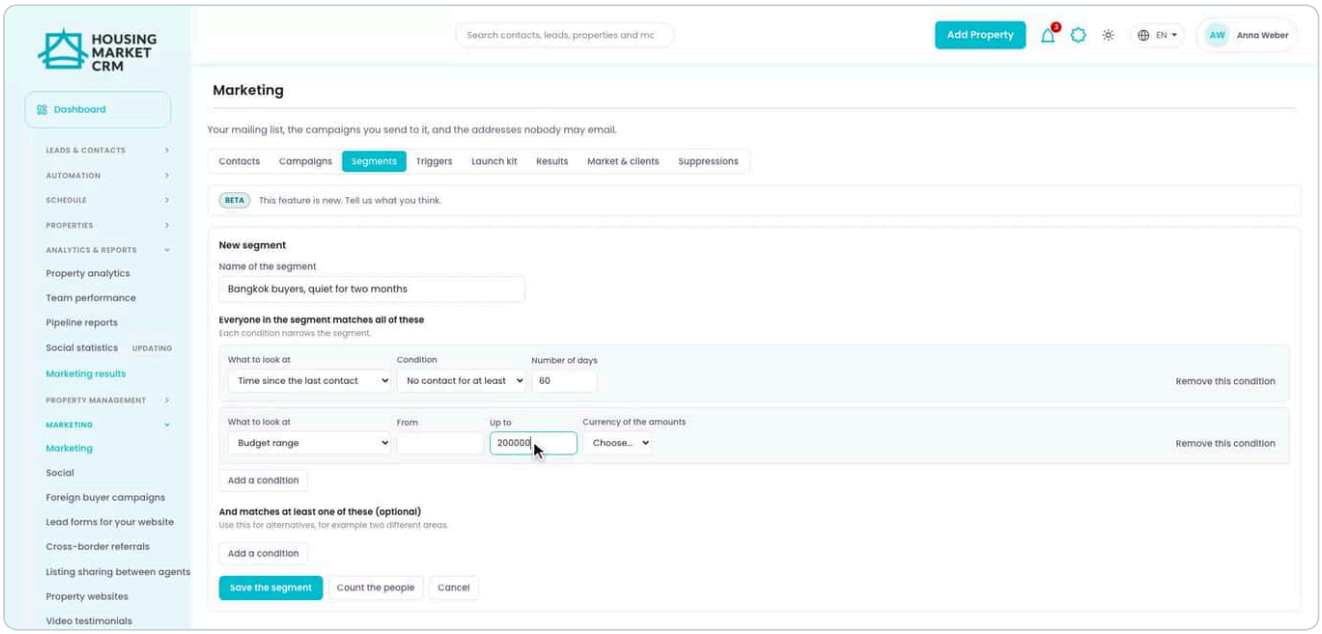


Figure 136.14 · Screen recorded 29 October 2026

15 Choose the **currency**. Different currencies are never compared.

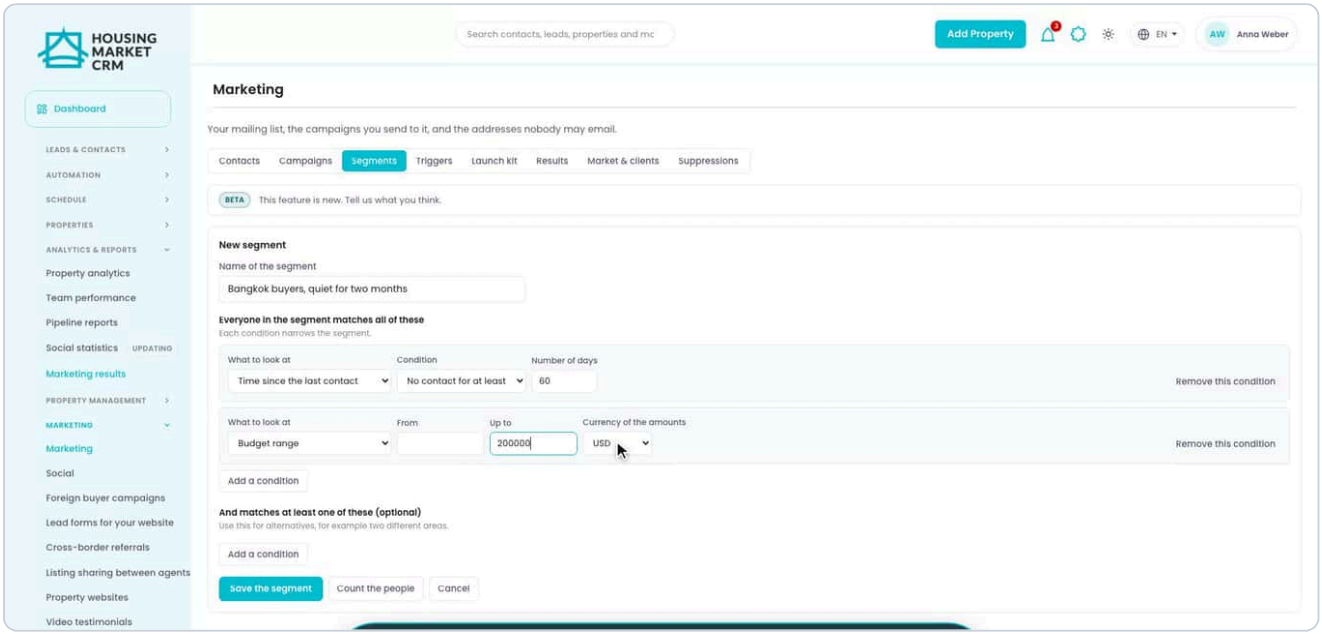


Figure 136.15 · Screen recorded 29 October 2026

16 The second group is for **alternatives**, and it is optional.

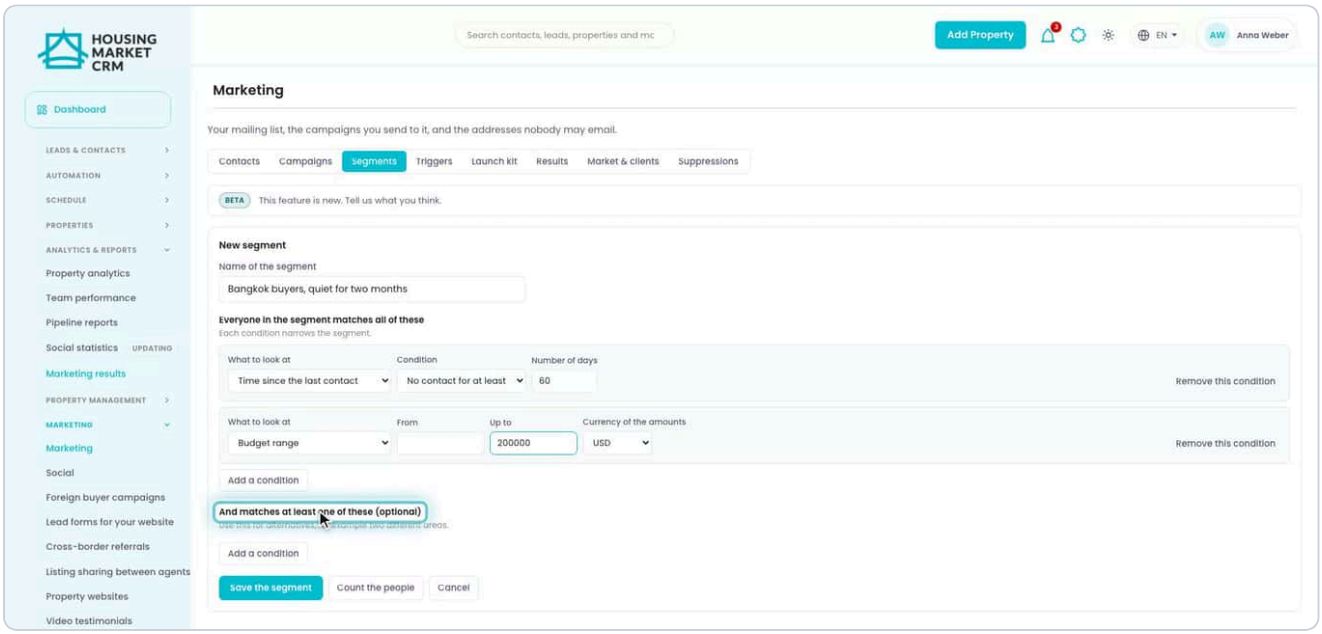


Figure 136.16 · Screen recorded 29 October 2026

17 Click **Count the people** before you save.

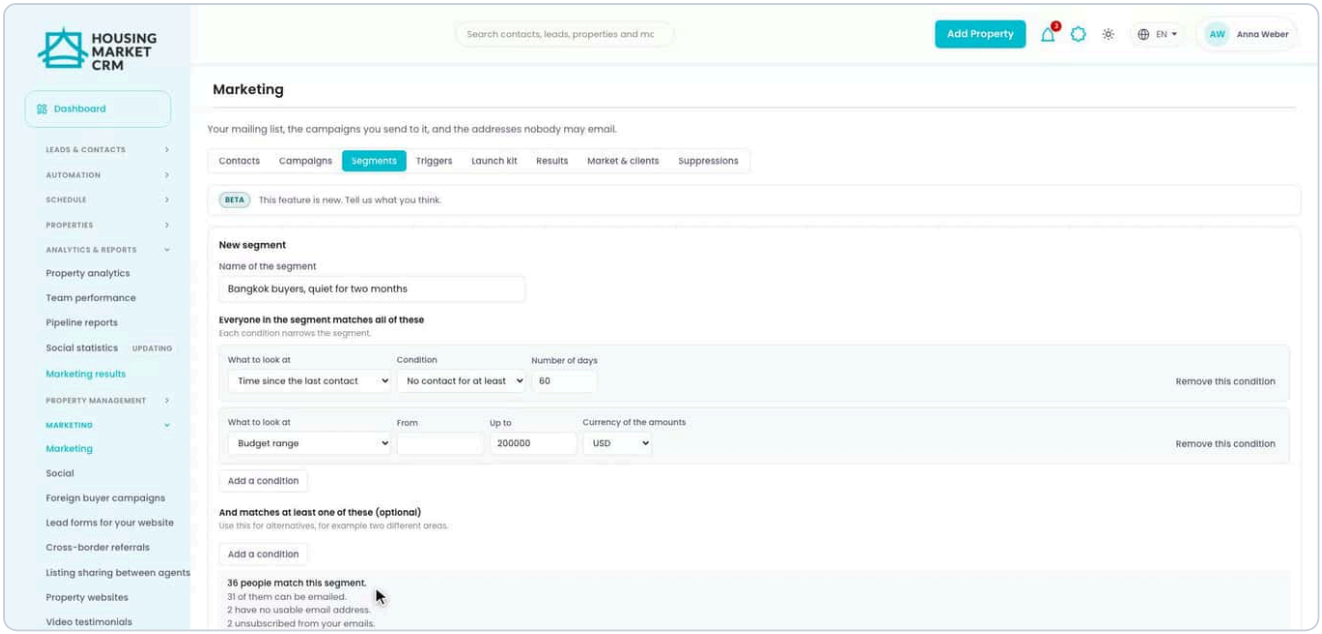


Figure 136.17 · Screen recorded 29 October 2026

18 Every figure is **a count**. An address is never shown.

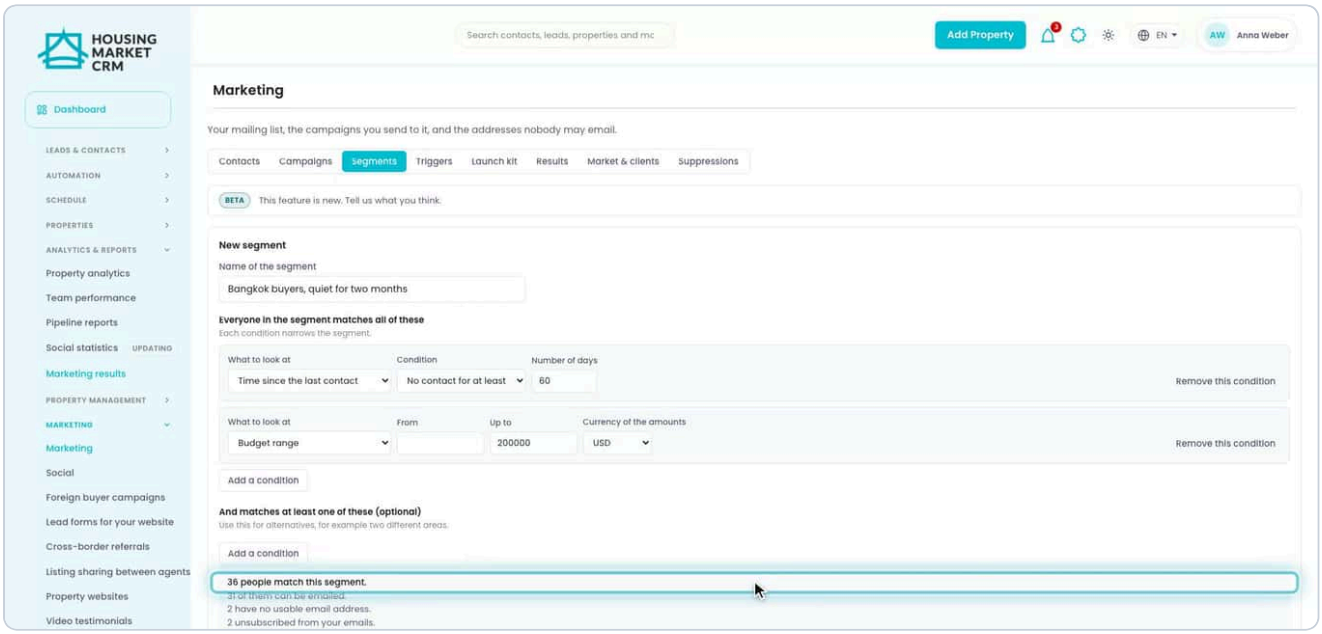


Figure 136.18 · Screen recorded 29 October 2026

19 Click **Save the segment.**

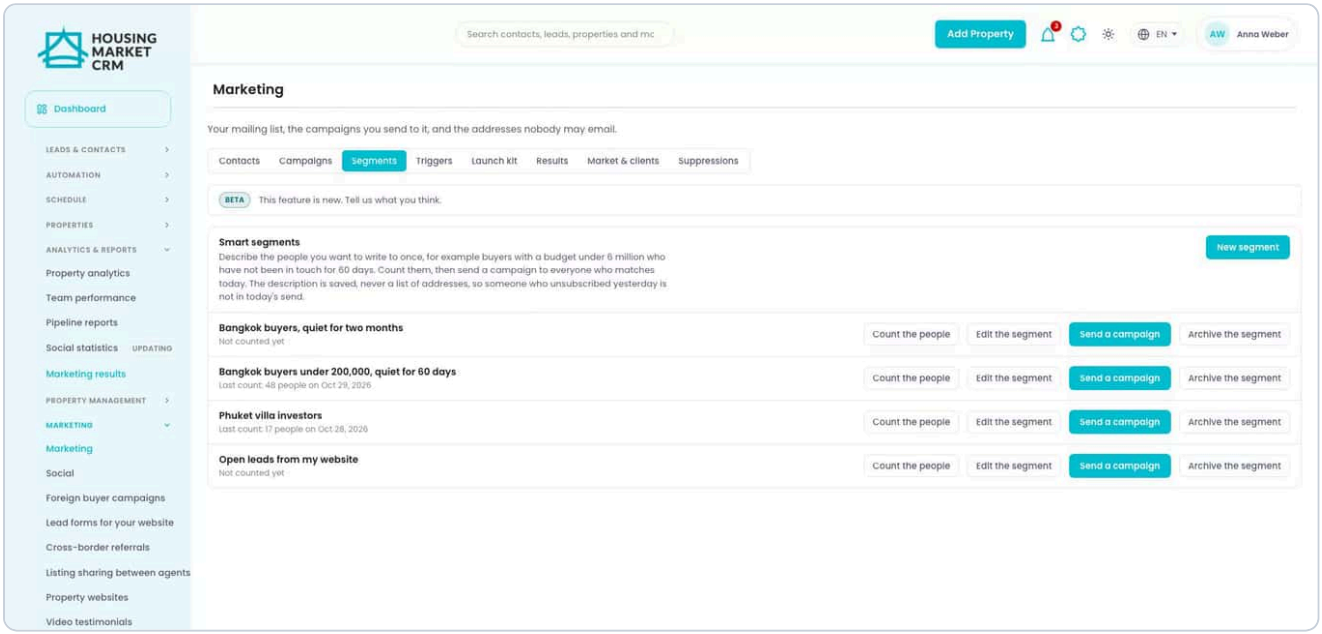


Figure 136.19 · Screen recorded 29 October 2026

20 The segment is saved. **Use it in any campaign.**

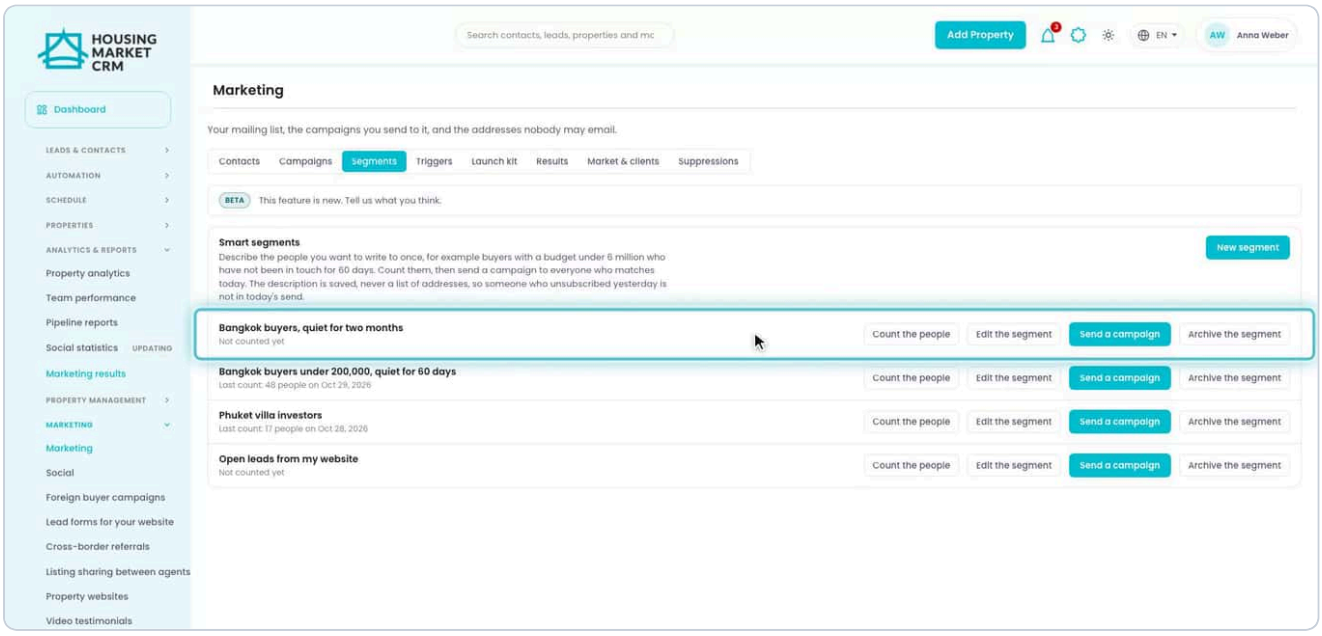


Figure 136.20 · Screen recorded 29 October 2026

21 Click **Send a campaign** on a segment.

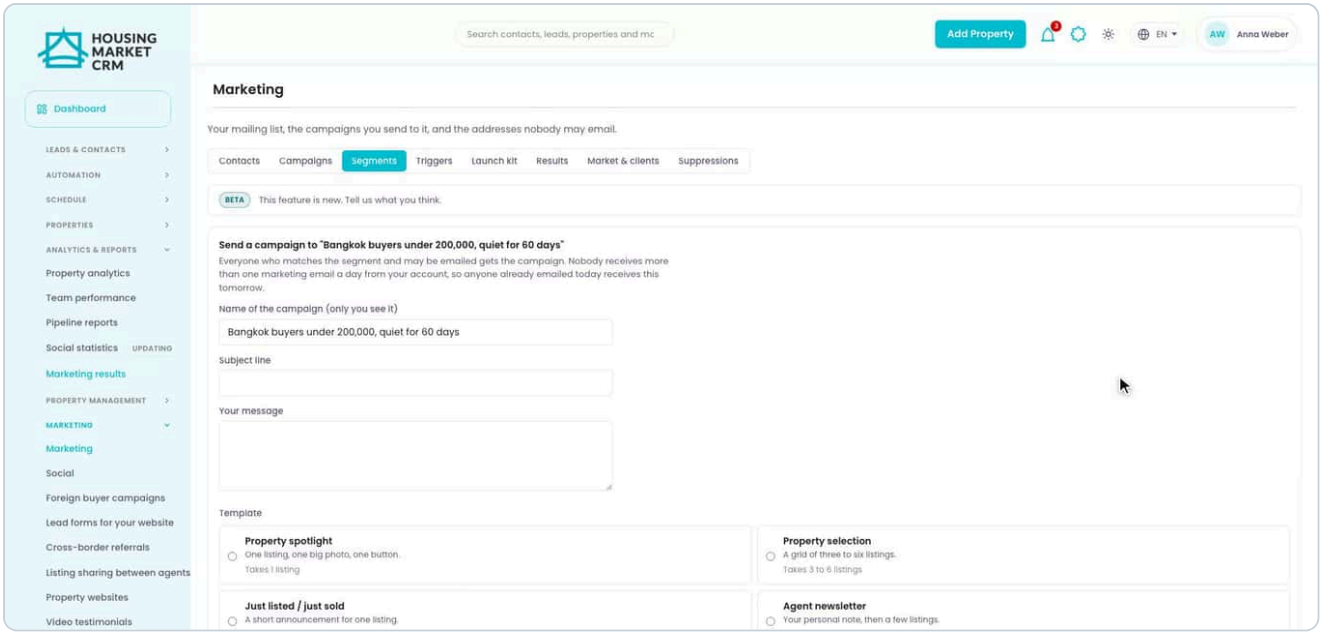


Figure 136.21 · Screen recorded 29 October 2026

22 Write the **subject line**.

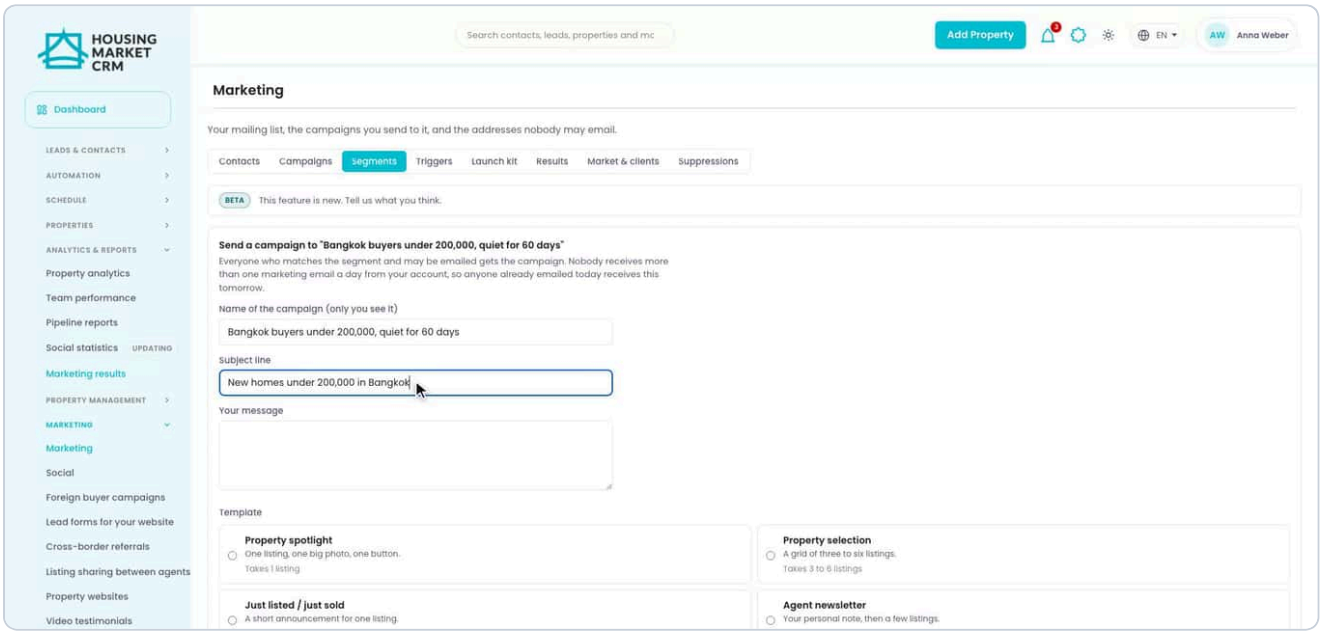


Figure 136.22 · Screen recorded 29 October 2026

23 Add **your message**.

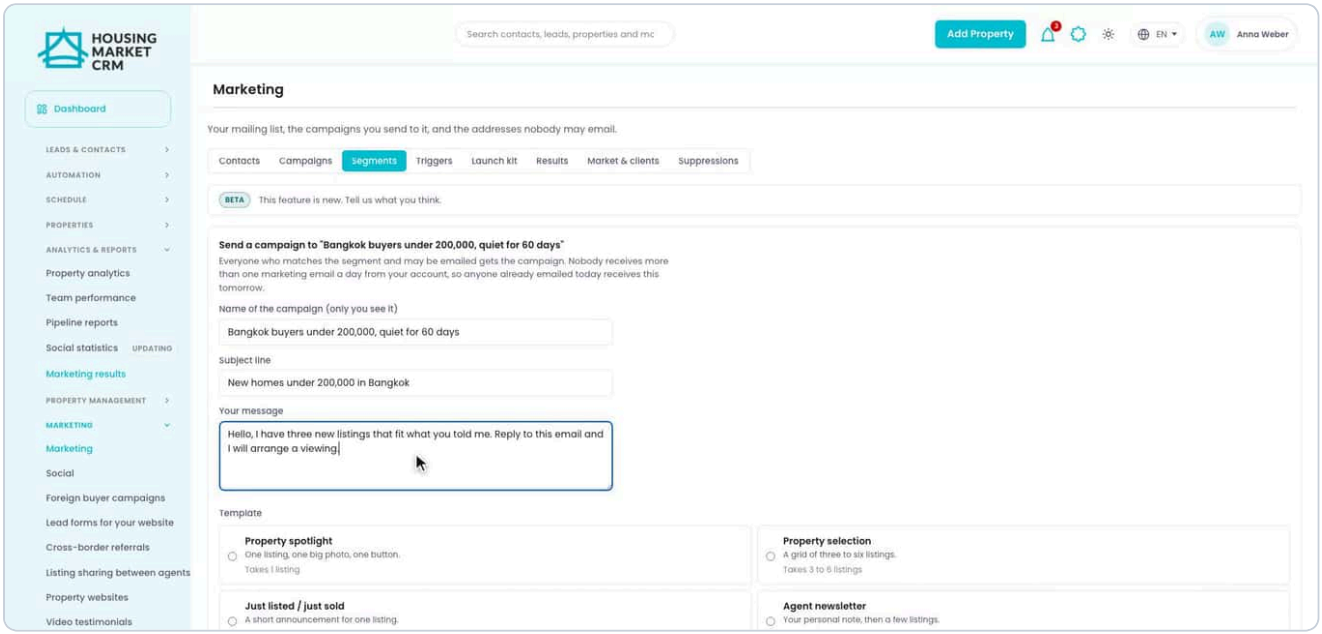


Figure 136.23 · Screen recorded 29 October 2026

24 Confirm that **these people asked to hear from you**. You confirm it for every send.

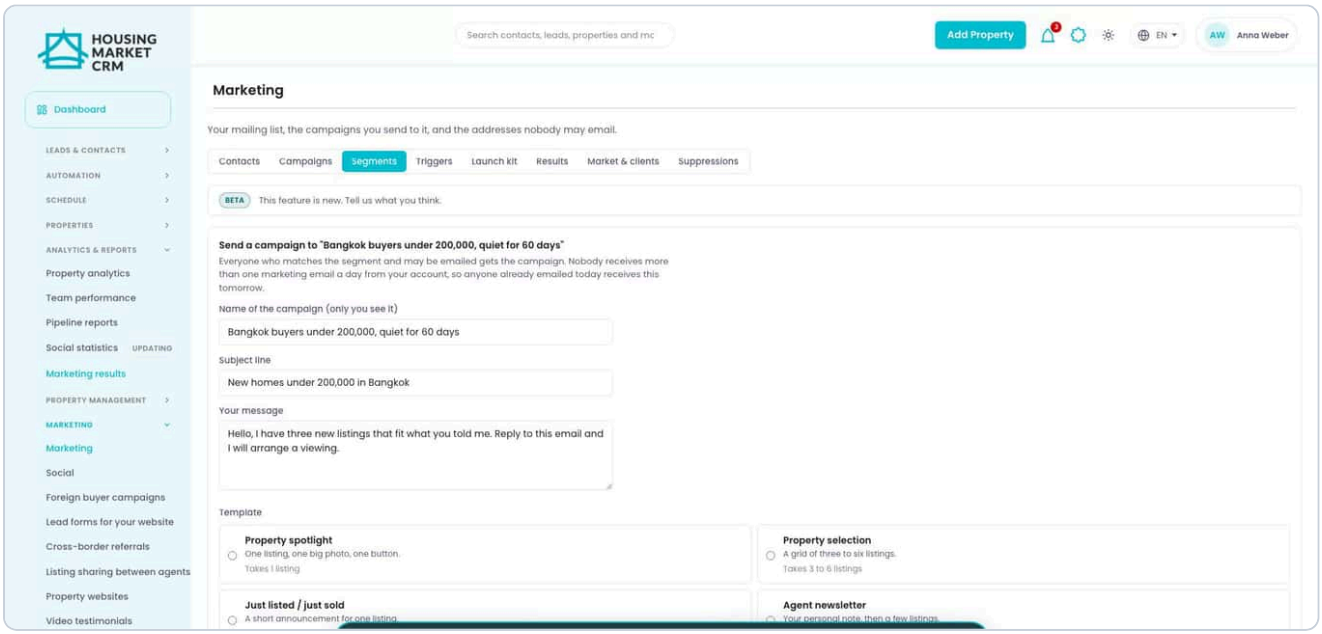


Figure 136.24 · Screen recorded 29 October 2026

25 Only then does **Send the campaign** unlock. We stop here: **nothing is sent** in this video.

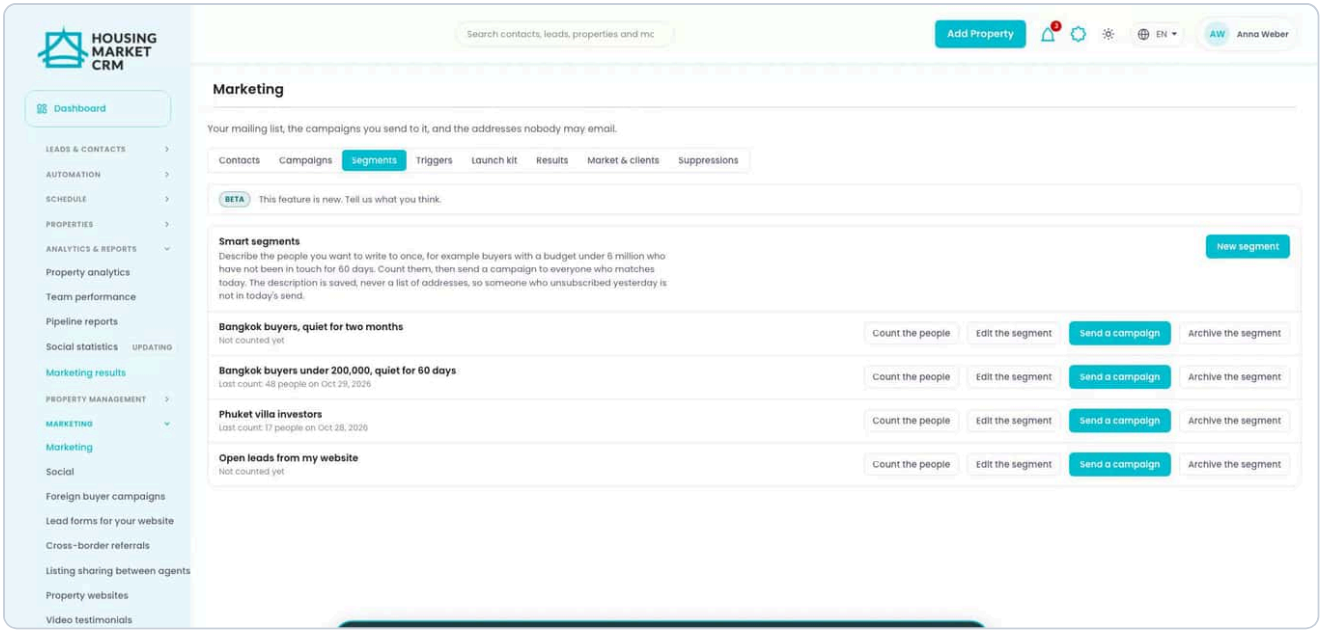


Figure 136.25 · Screen recorded 29 October 2026

RELATED HELP CENTER ARTICLES

How do I send an email campaign to my contacts?	faq.housingmarketgroup.com/faq/how-do-i-send-an-email-campaign

137 CHAPTER 137

Set up automatic email triggers

Pro and Business | For agents | Watch the video

OVERVIEW

A trigger writes to the right people when something happens: a new listing in an area, a price drop, a lead that has gone quiet or a deal you have won. It is part of Pro, and every trigger starts switched off.

Open Marketing and then Triggers, and choose what should start it:

- A new listing in a saved area: when a listing of yours goes live in the area you choose, for sale, for rent or both, the buyers whose stated needs it suits get an email featuring it.
- A price drop: when the price of one of your live listings falls by at least the percentage you set, the buyers it suits are told. The first time the CRM sees a listing it only records the price, so a drop is counted from then on.
- A lead that has gone quiet: when a lead has had no contact for the number of days you set, they get your message. It carries no listing.
- A deal that has been won: a few days after you win a deal, the client gets your thank-you message. It carries no listing.

A new trigger is saved switched off and writes to nobody. You switch it on yourself, and you confirm that the people it writes to asked to hear from you or have a relationship with you that allows it. Before that, Check what it would do now shows what it would send, and sends nothing.

Each firing happens once. Someone a trigger has written to is left alone for the number of days you set, and the one-marketing-email-a-day limit of your account still applies, so a person already emailed today receives it tomorrow. The same checks as for segments apply: no unsubscribed, suppressed or duplicate addresses, and a recorded opt-in where the market requires one. What each trigger has done is listed under What it has done. Triggers are part of Pro, and a downgrade stops them.

From the Help Center: **How do trigger campaigns work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

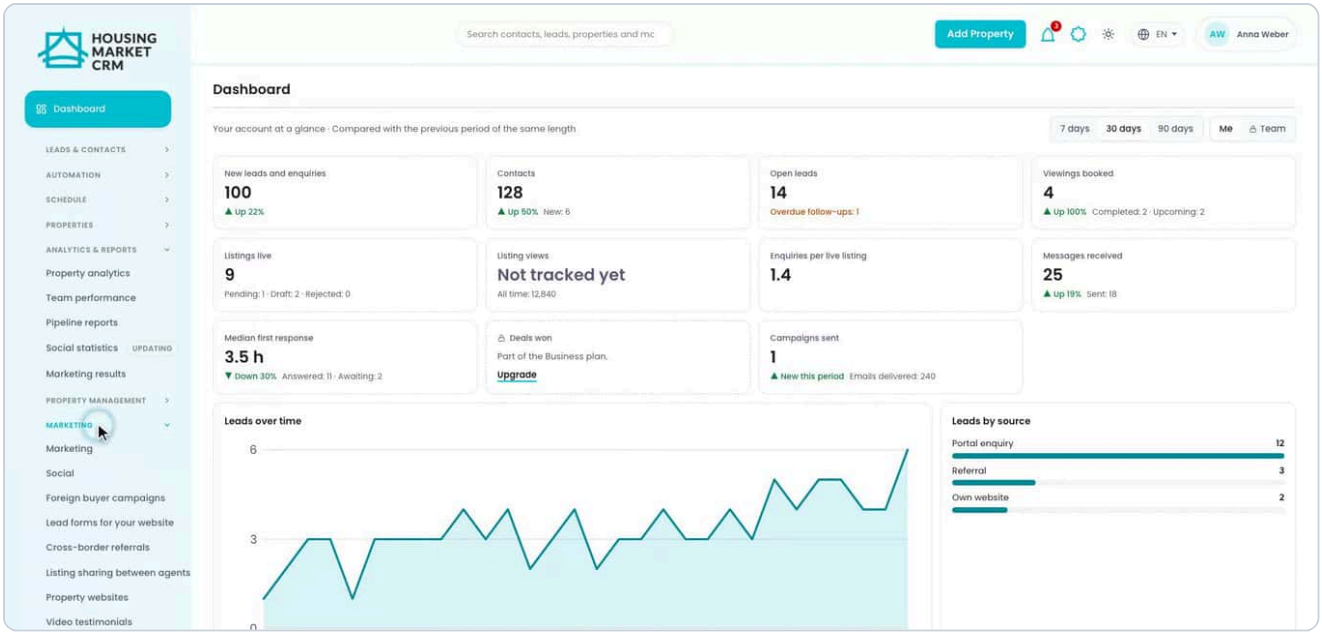


Figure 137.1 · Screen recorded 29 October 2026

2 Click **Marketing**.

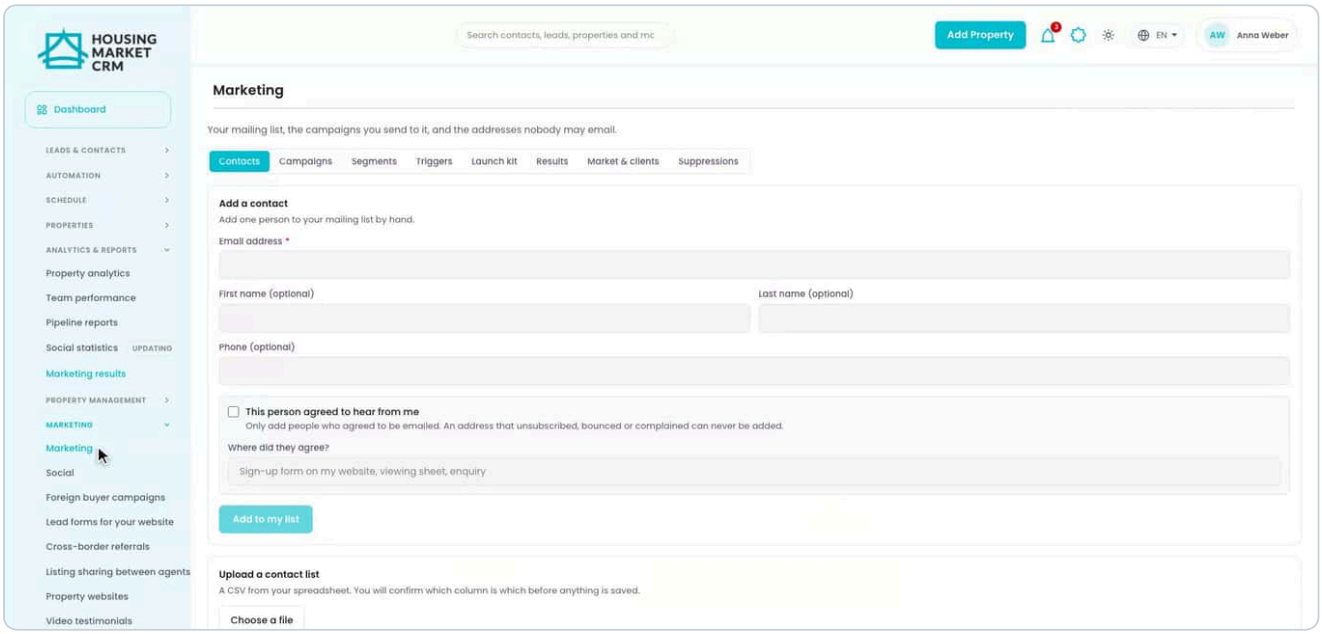


Figure 137.2 · Screen recorded 29 October 2026

3 Open the **Triggers** tab.

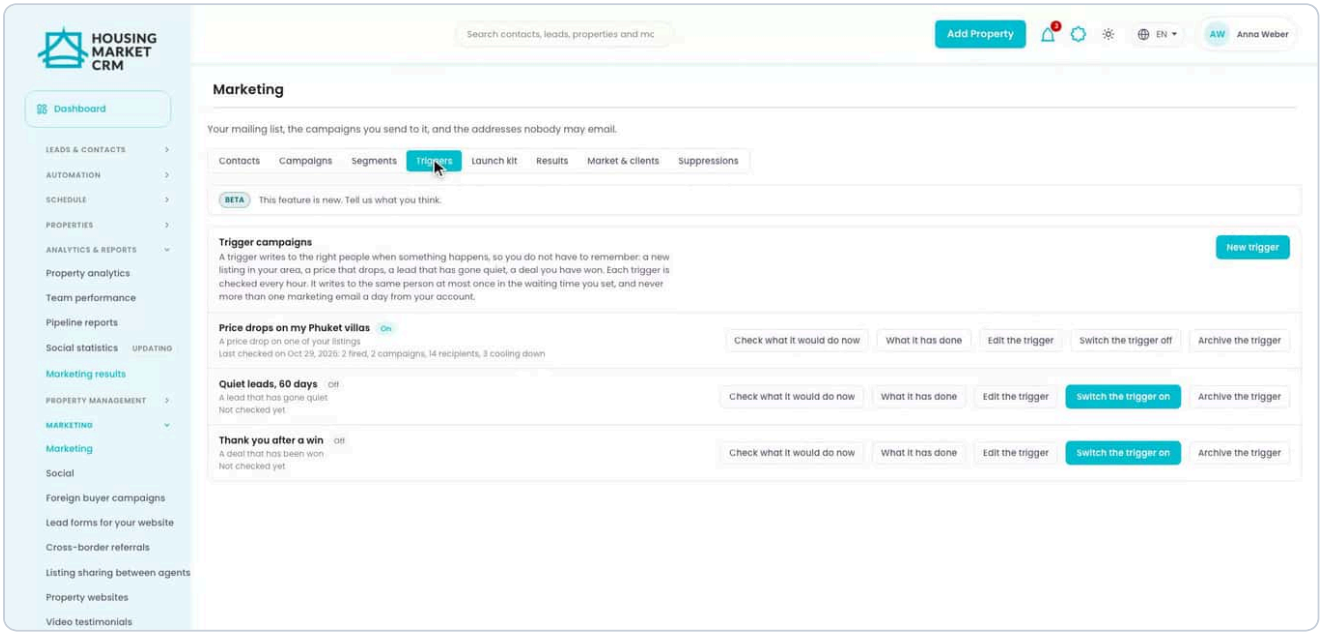


Figure 137.3 · Screen recorded 29 October 2026

4 This feature is new and shows a **Beta** badge while we refine it.

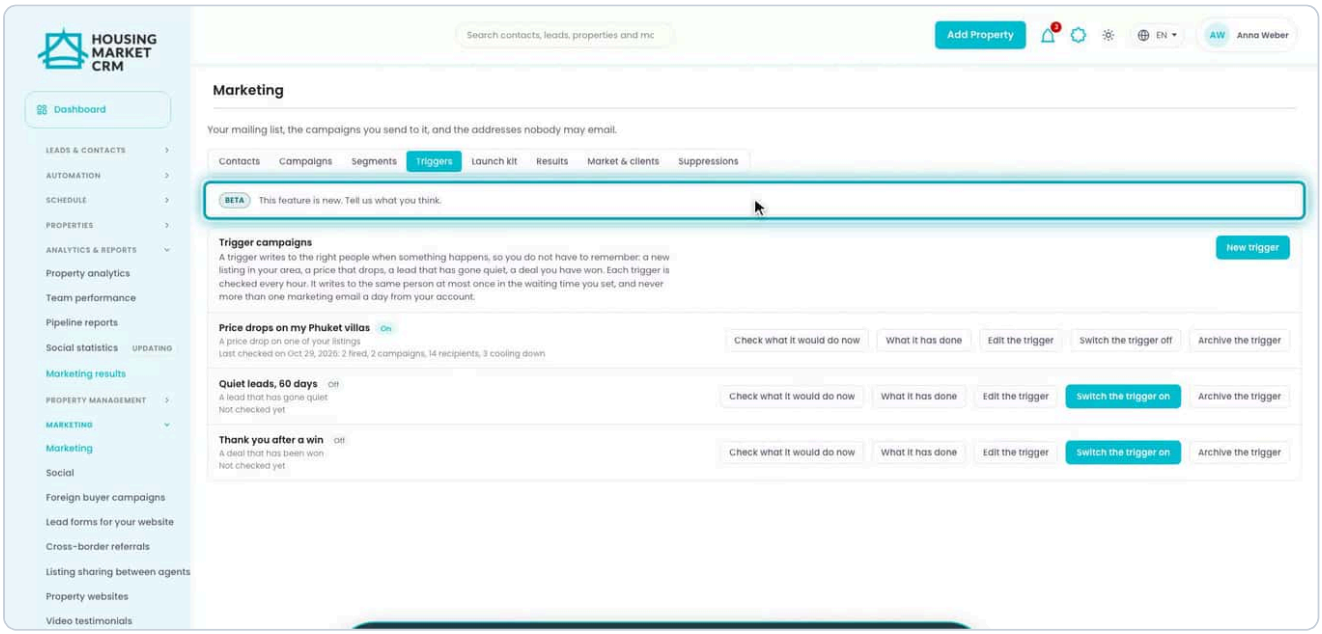


Figure 137.4 · Screen recorded 29 October 2026

5 A trigger writes to the right people **when something happens**.

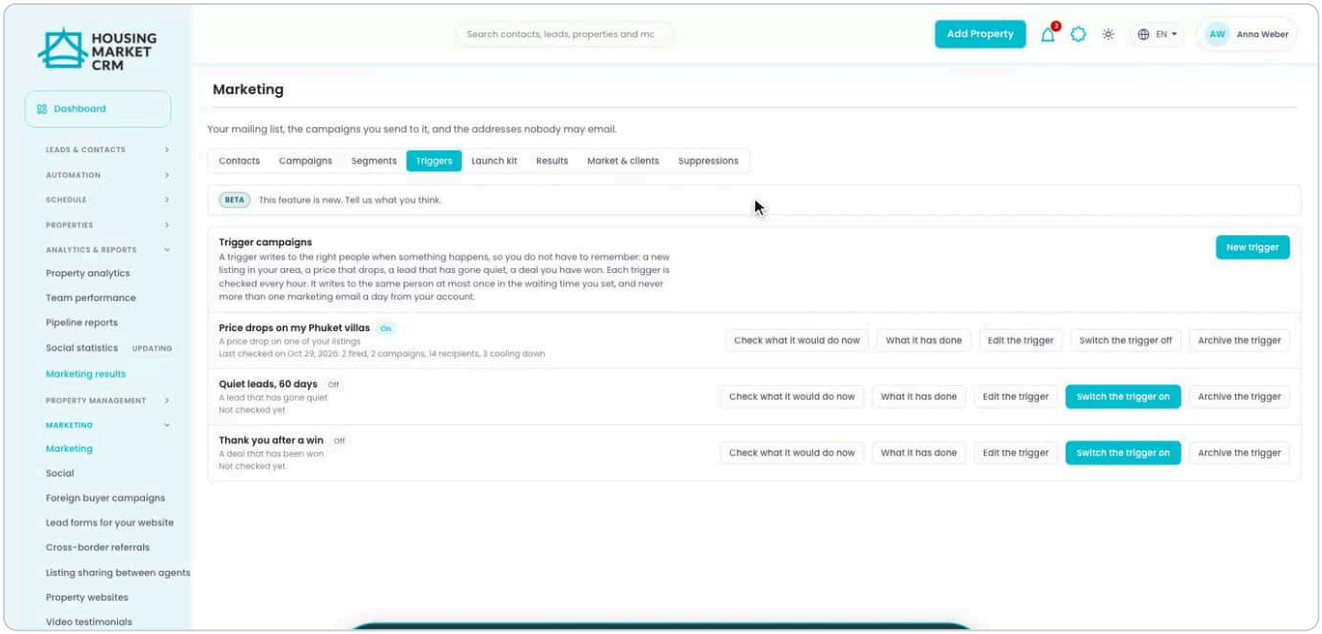


Figure 137.5 · Screen recorded 29 October 2026

6 This trigger is **On**. It is checked **every hour**.

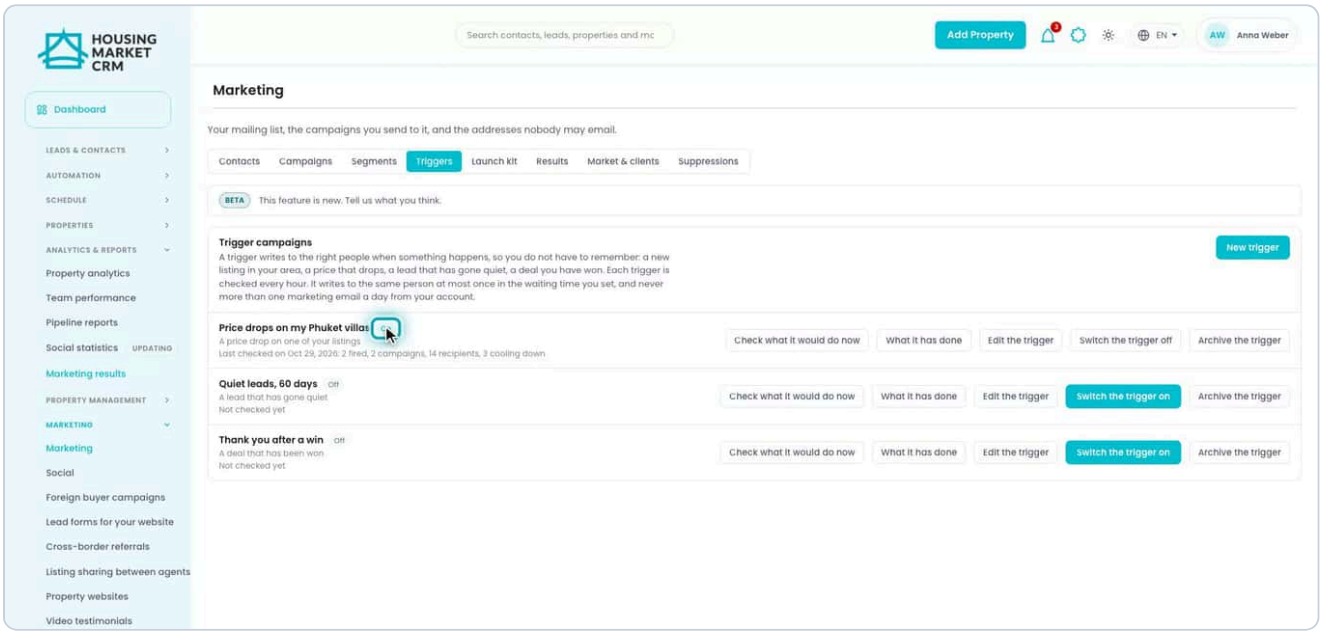


Figure 137.6 · Screen recorded 29 October 2026

7 Click **Check what it would do now**.

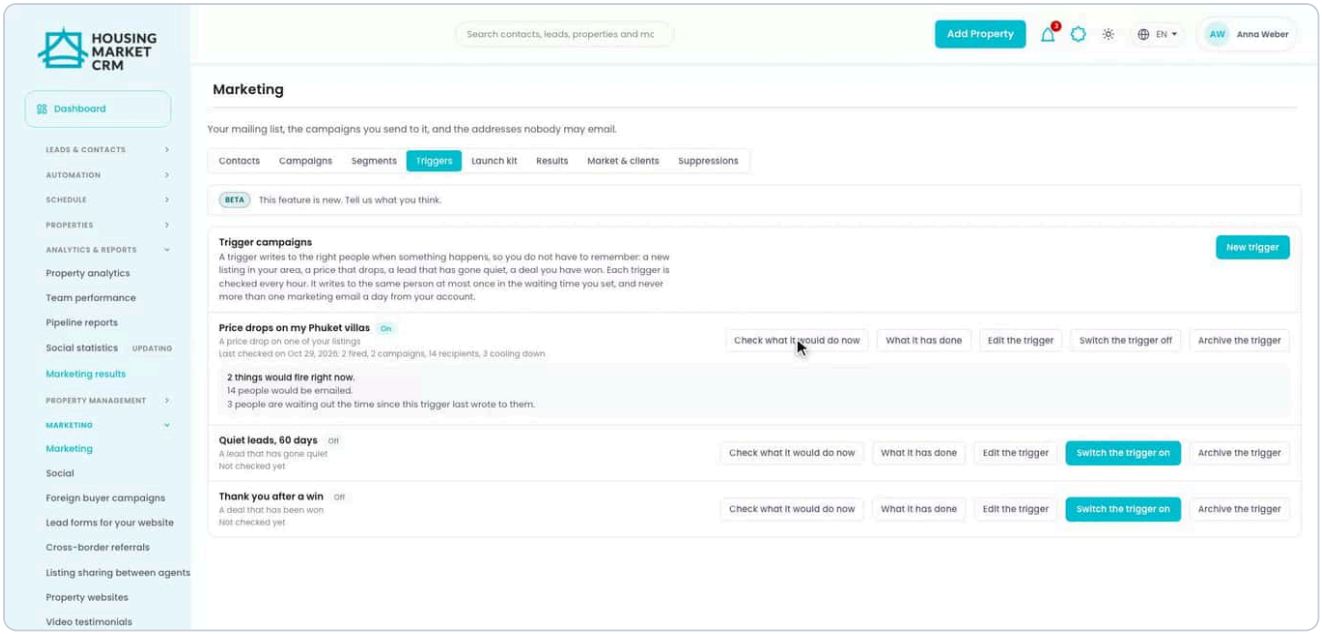


Figure 137.7 · Screen recorded 29 October 2026

8 It shows **what would happen right now**. Nothing is sent.

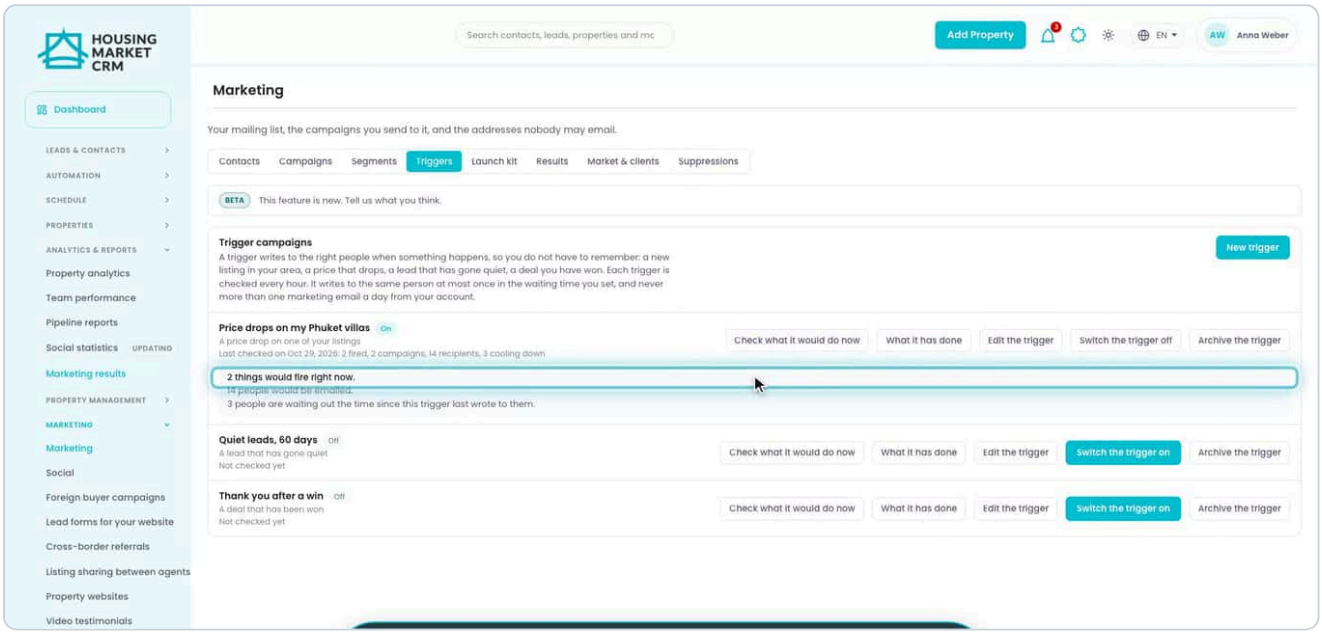


Figure 137.8 · Screen recorded 29 October 2026

9 People written to recently are **left alone** for the waiting time you set.

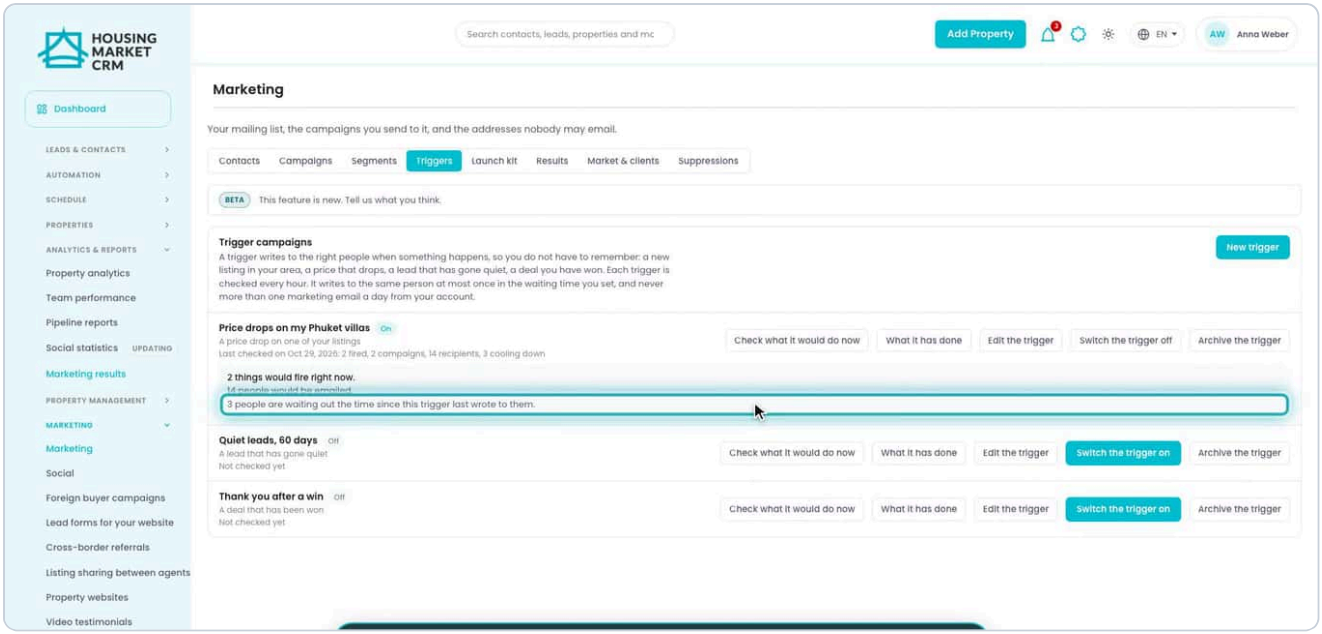


Figure 137.9 · Screen recorded 29 October 2026

10 Open **What it has done** to see every time it fired.

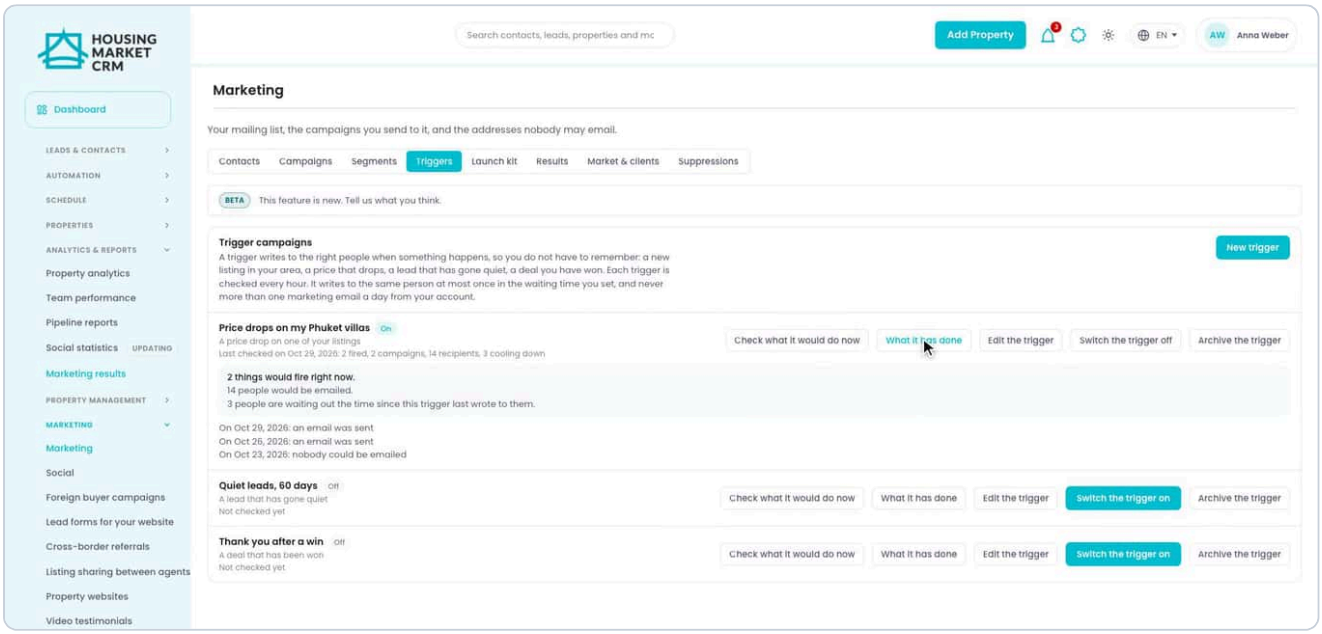


Figure 137.10 · Screen recorded 29 October 2026

11 Each row says **whether an email was sent**.

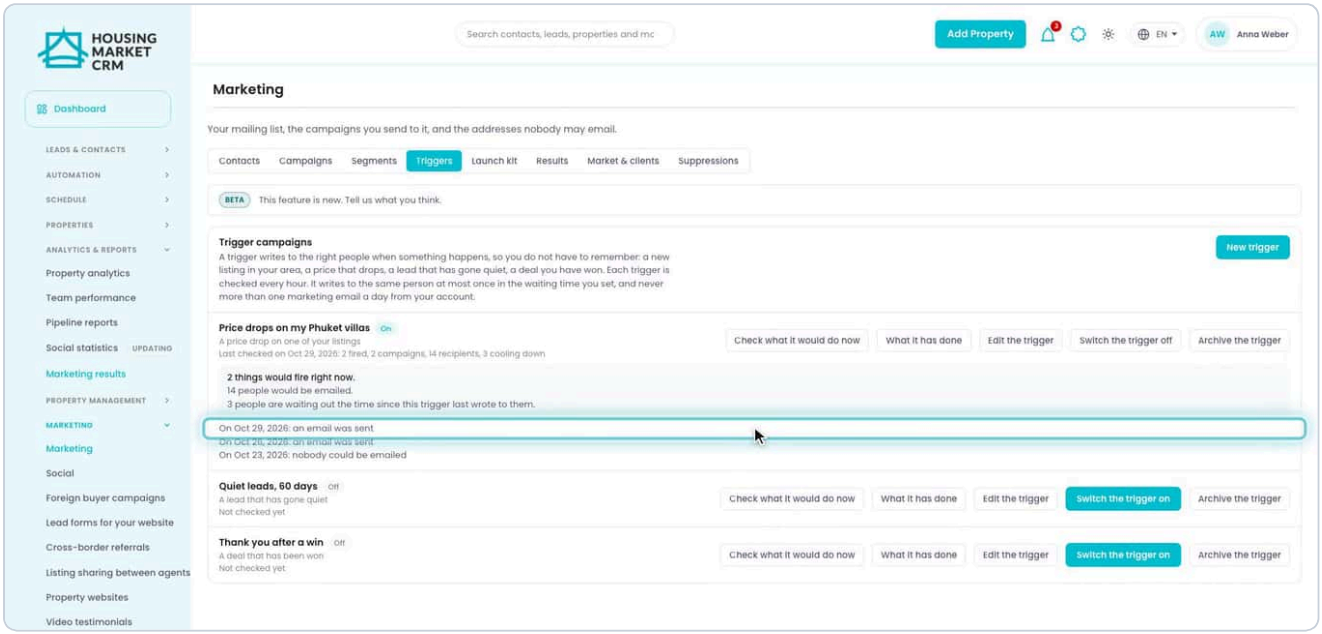


Figure 137.11 · Screen recorded 29 October 2026

12 Click **New trigger**.

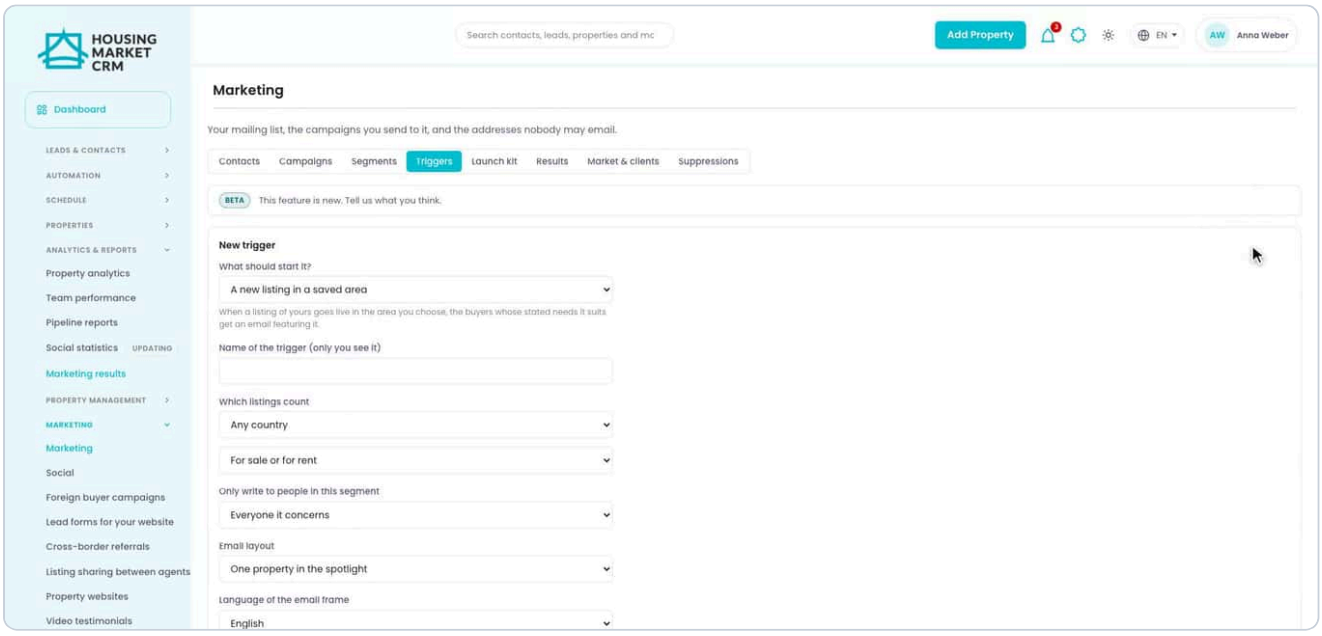


Figure 137.12 · Screen recorded 29 October 2026

13 Choose what should start it: a new listing, a price drop, a quiet lead or a won deal.

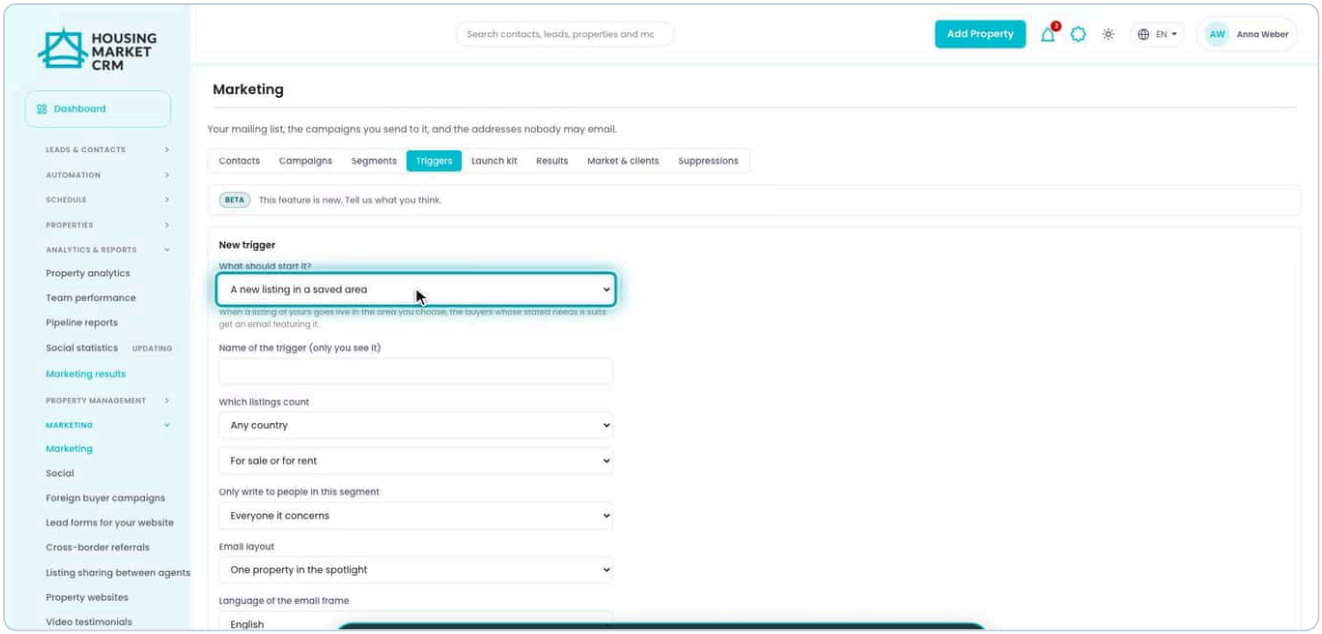


Figure 137.13 · Screen recorded 29 October 2026

14 Choose **A lead that has gone quiet**.

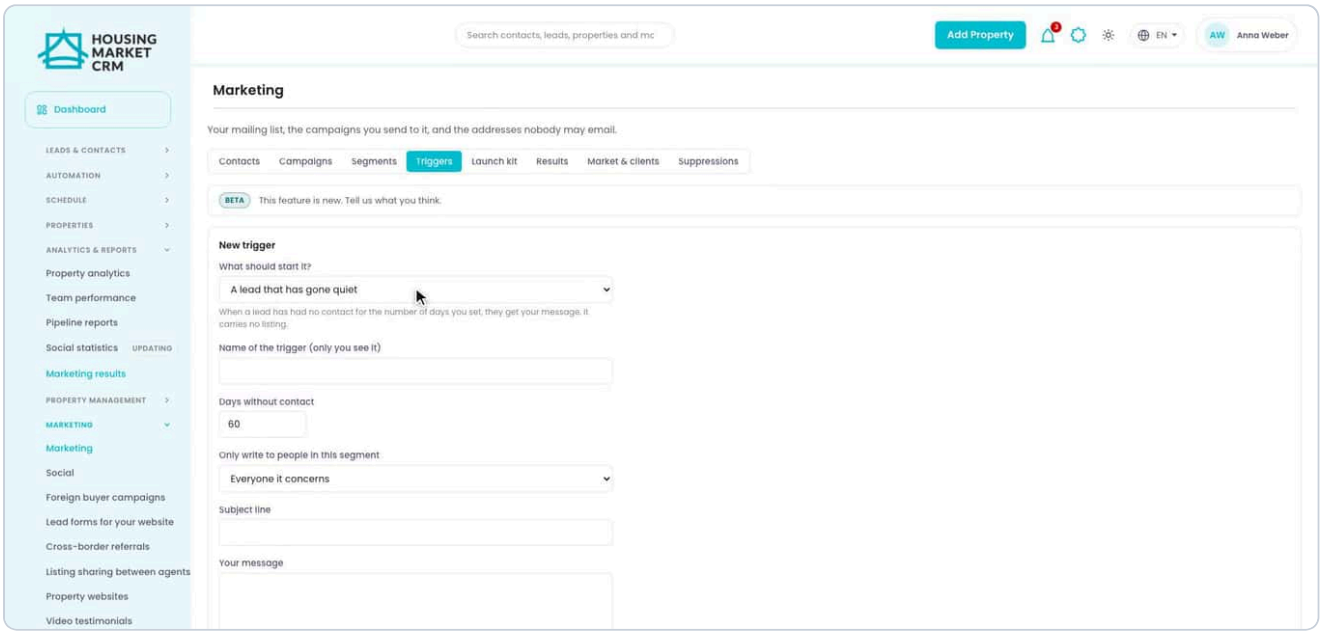


Figure 137.14 · Screen recorded 29 October 2026

15 Give the trigger a **name** only you see.

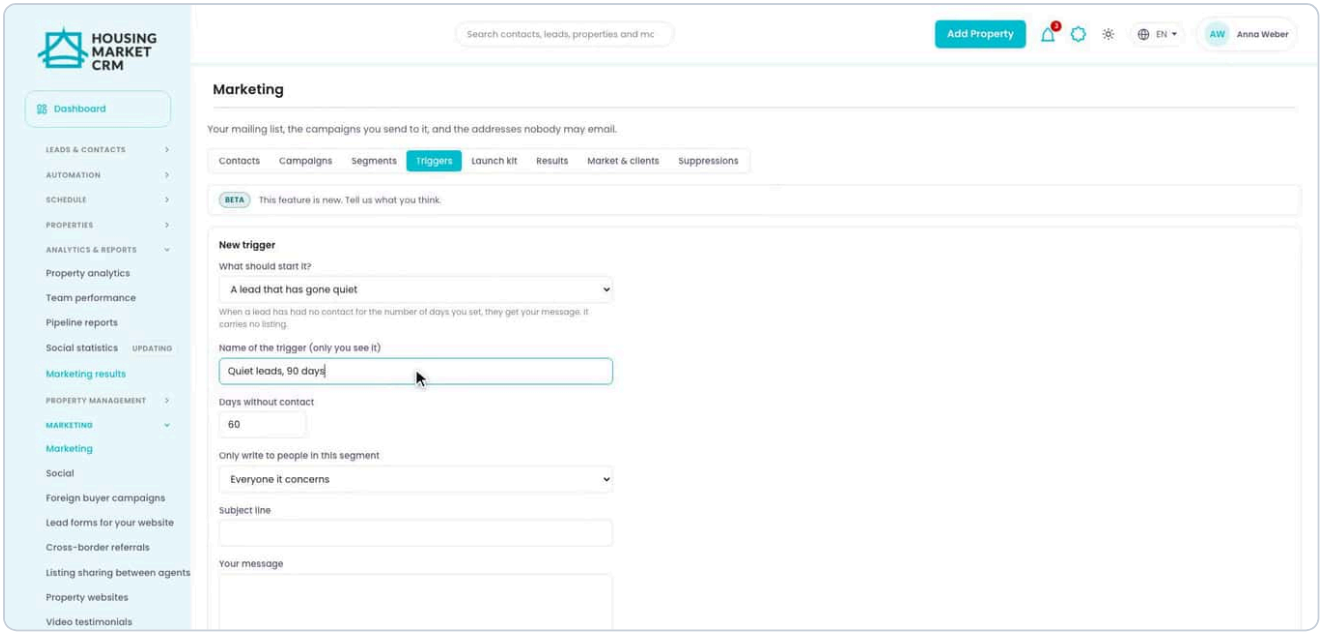


Figure 137.15 · Screen recorded 29 October 2026

16 Set the number of **days without contact**.

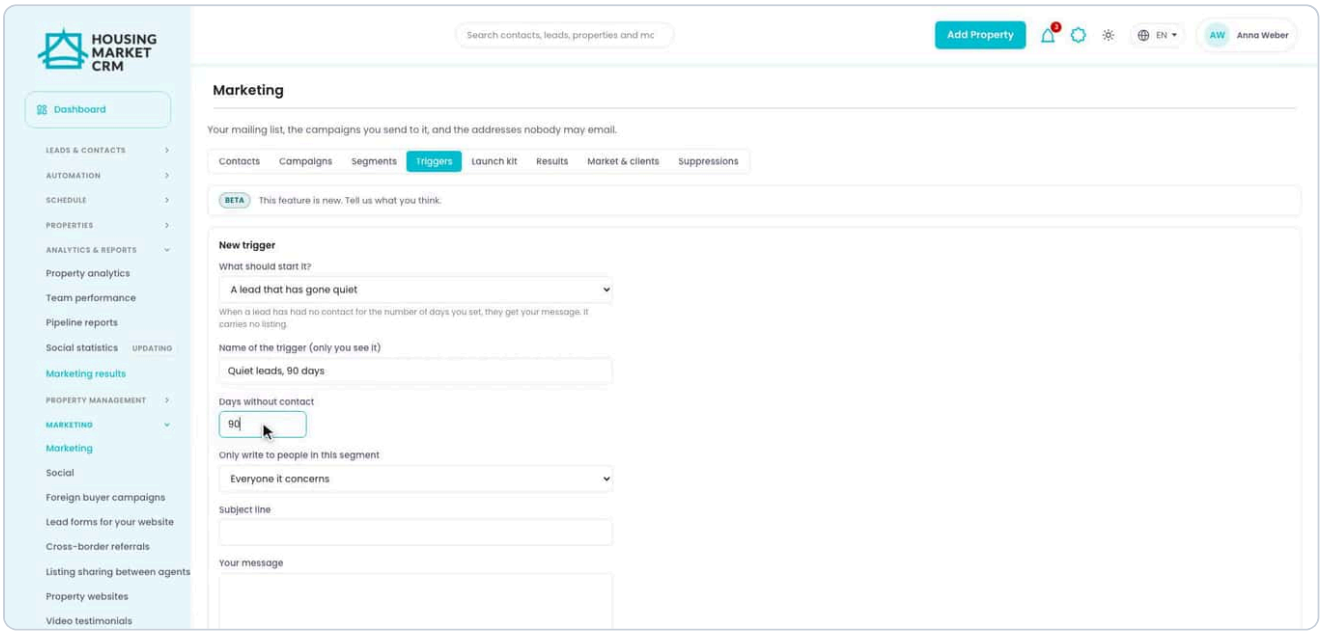


Figure 137.16 · Screen recorded 29 October 2026

17 Write the **subject line**.

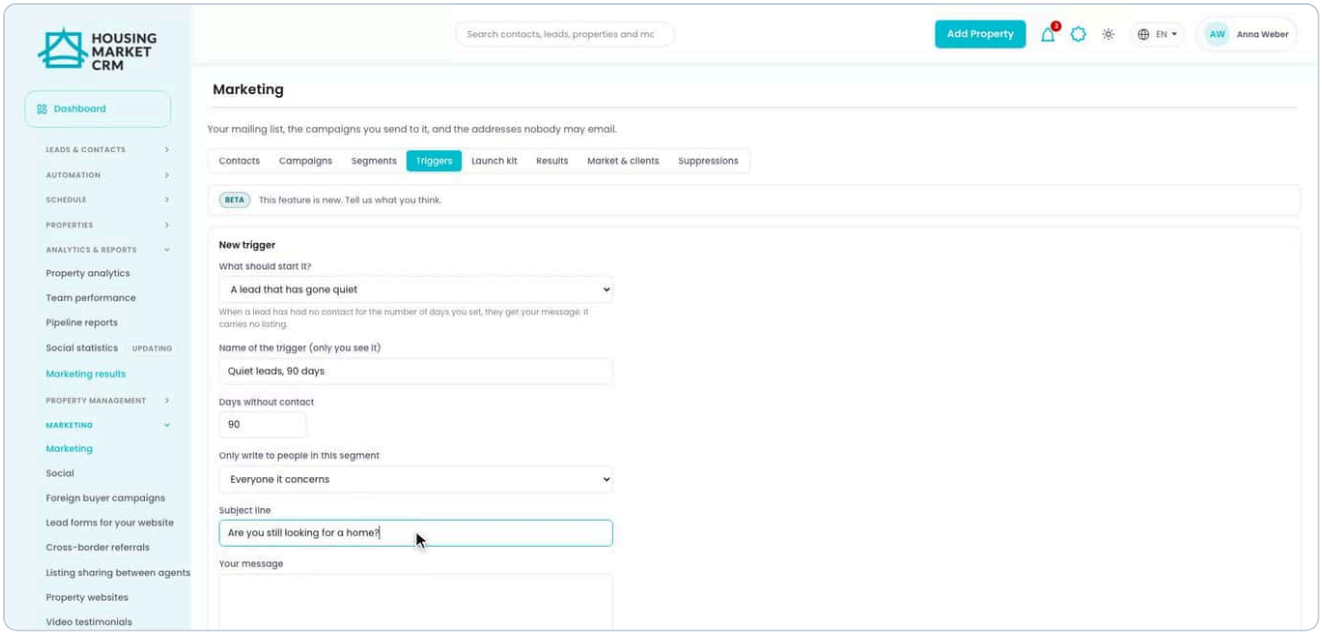


Figure 137.17 · Screen recorded 29 October 2026

18 Write **your message**.

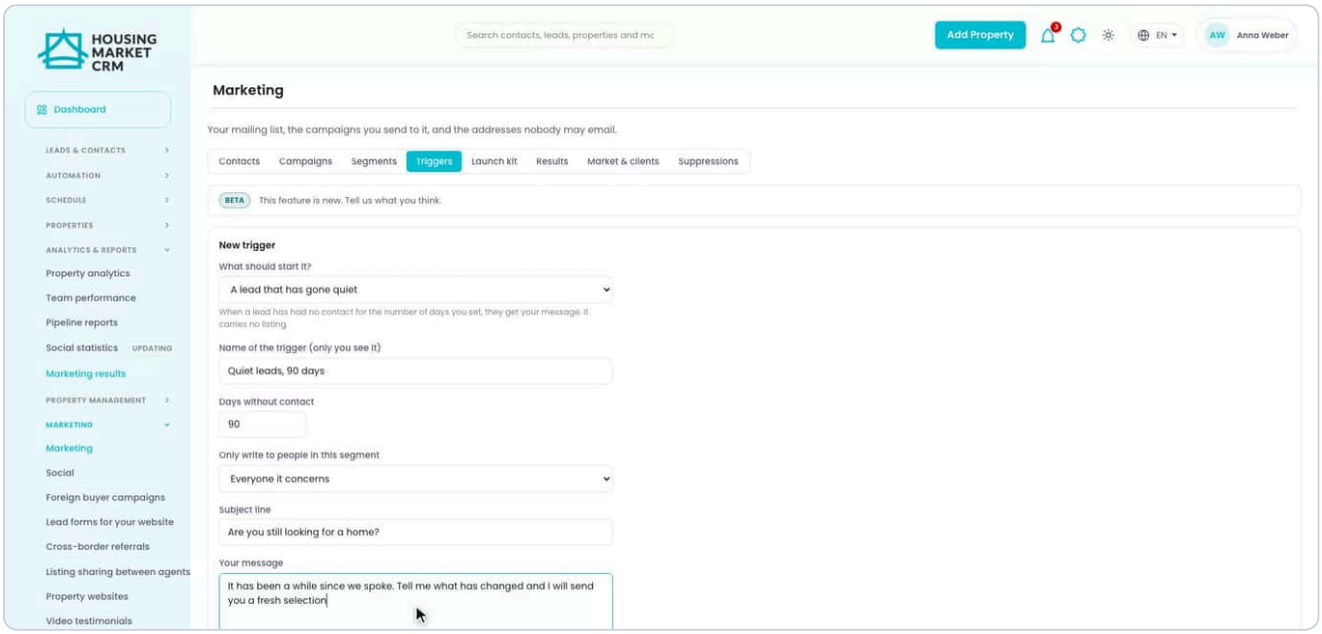


Figure 137.18 · Screen recorded 29 October 2026

19 A new trigger is saved **switched off**. It writes to nobody yet.

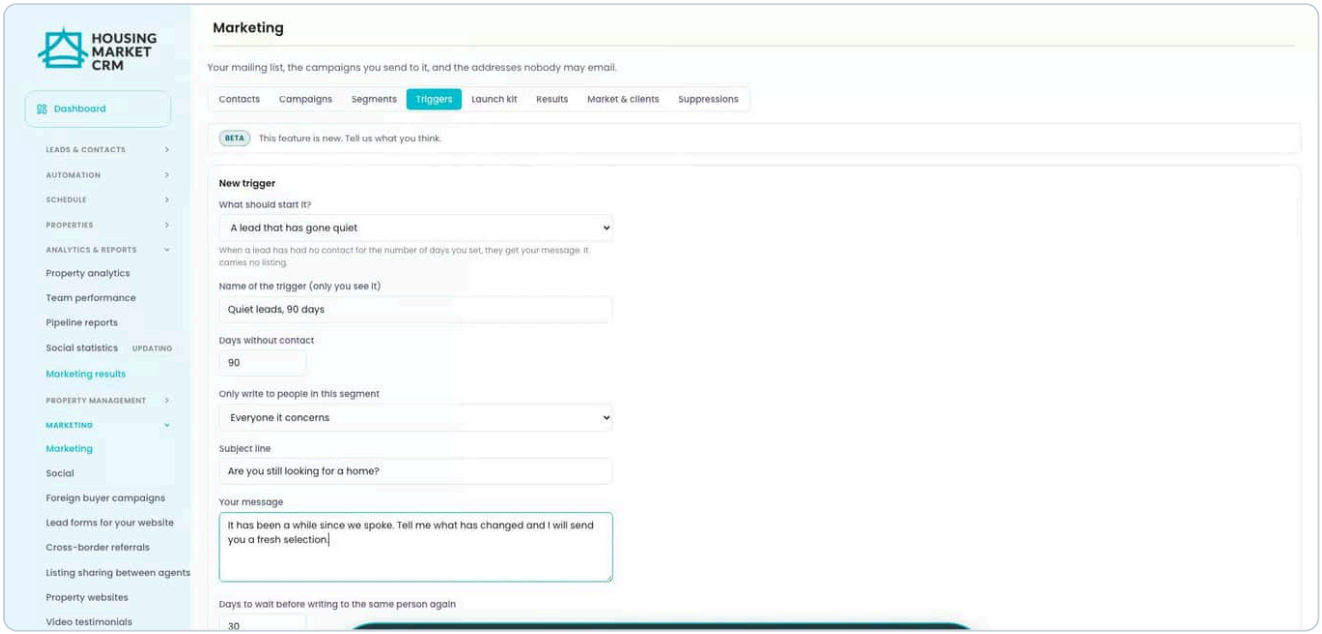


Figure 137.19 · Screen recorded 29 October 2026

20 Click **Save the trigger**.

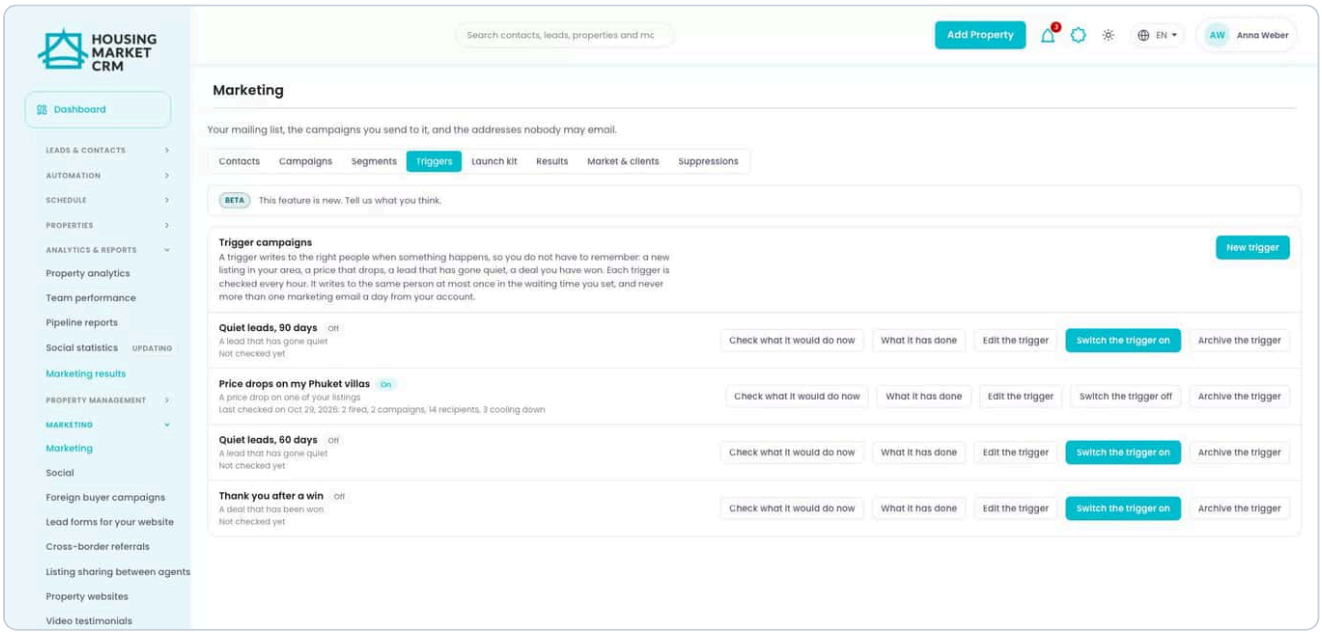


Figure 137.20 · Screen recorded 29 October 2026

21 A check on a switched-off trigger tells you what is missing.

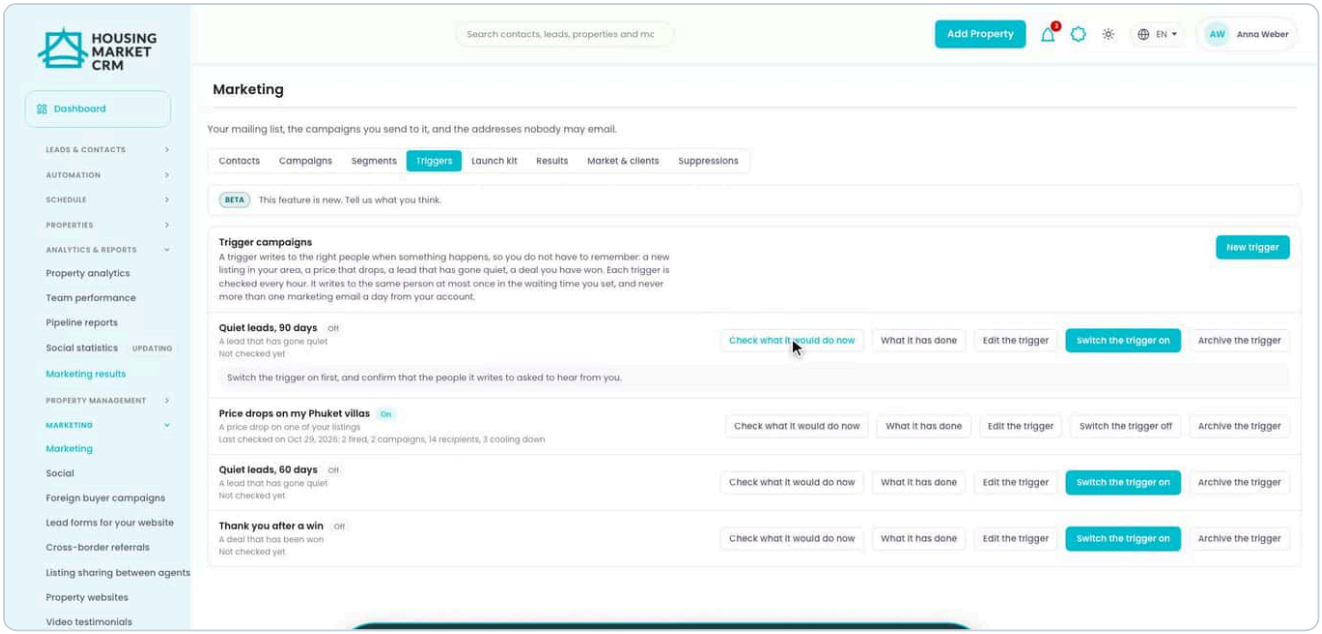


Figure 137.21 · Screen recorded 29 October 2026

22 It asks you to **confirm** that these people asked to hear from you.

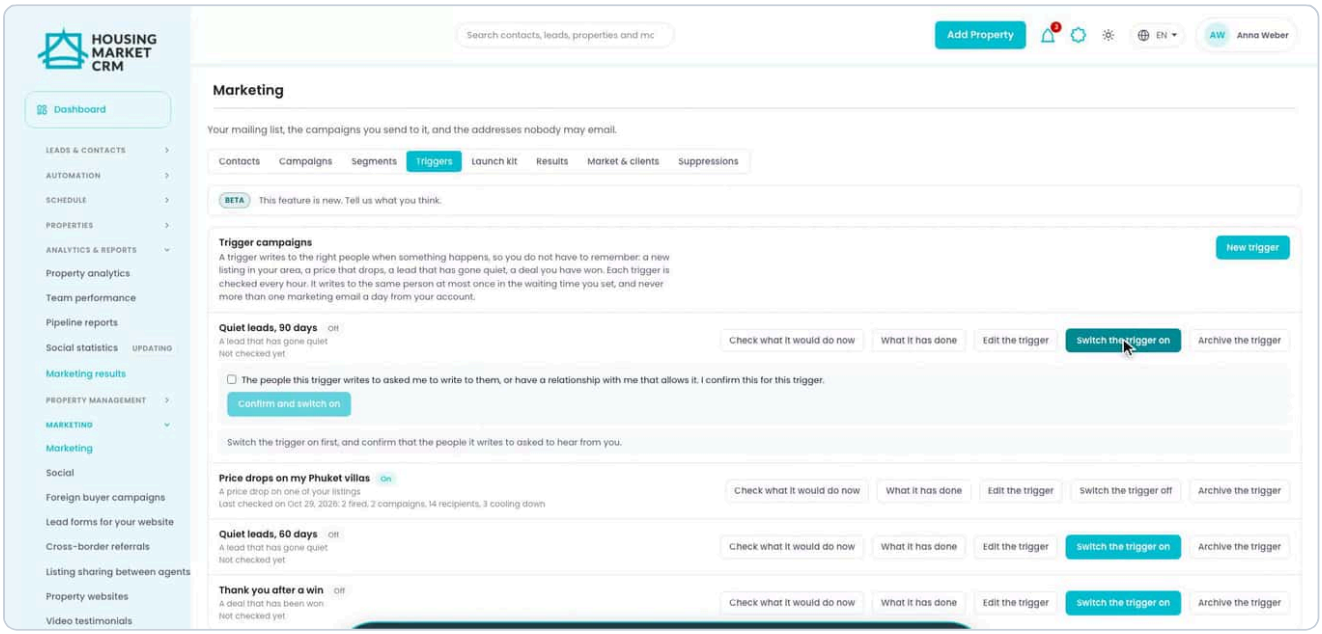


Figure 137.22 · Screen recorded 29 October 2026

23 You **declare** that the people asked to hear from you.

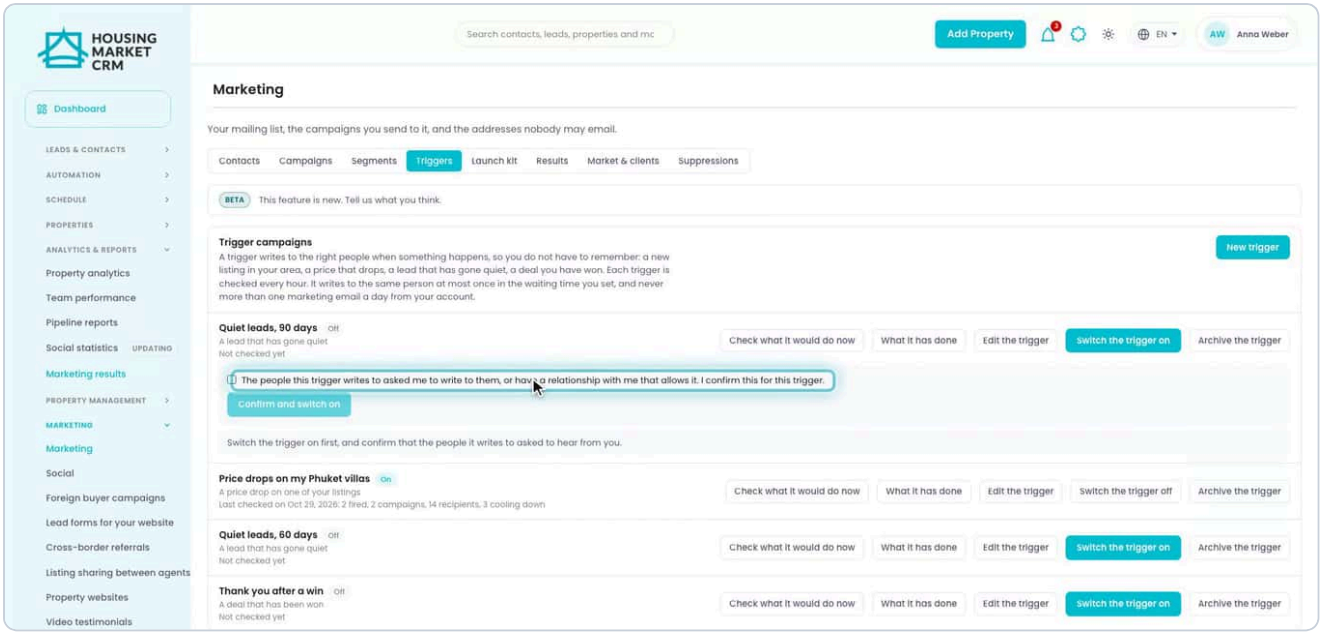


Figure 137.23 · Screen recorded 29 October 2026

24 Only after you tick the box can you click **Confirm and switch on**. We stop here, so this trigger stays off.

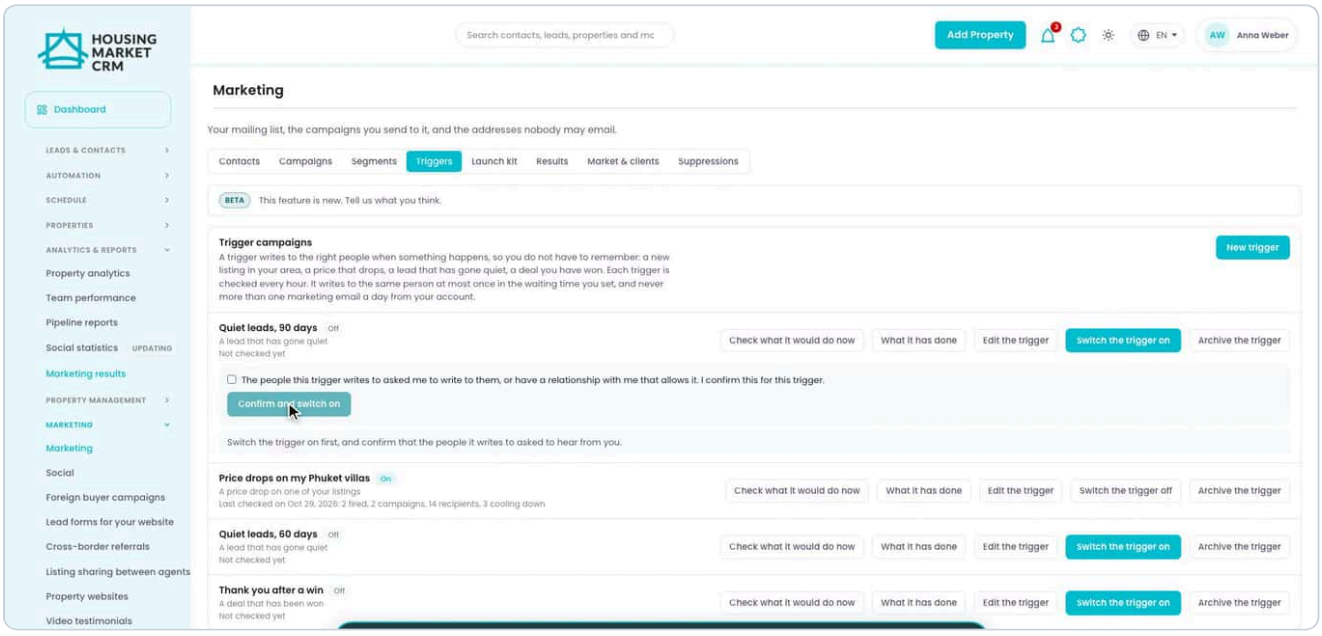


Figure 137.24 · Screen recorded 29 October 2026

RELATED HELP CENTER ARTICLES

How does nurture work? faq.housingmarketgroup.com/faq/how-does-nurture-work

138 CHAPTER 138

Use the Launch kit

Pro and Business | For agents | Watch the video

OVERVIEW

Choose a live listing and the kit emails the buyers it suits, makes the flyer and, if you set a daily budget, starts a Housing Market Ads campaign. It is part of Pro.

Open Marketing and then Launch kit, and choose Launch a listing. Only a live listing of yours can be launched, and a listing can be launched once. The steps are:

- Email: to the buyers the listing suits, or only to the people in a segment you choose. You write the subject and the message, and you confirm that the people asked to hear from you. Your account's limits and the one-email-a-day rule apply.
- Flyer: the listing's flyer with its QR code, made or reopened. It needs the flyer tool.
- Ads boost: a Housing Market Ads campaign for the listing. You type the daily budget for the launch, so a launch never spends an amount you did not choose, and a card must be saved in Housing Market Ads.
- Social posts: these need Housing Market Social. Without it the kit shows the offer to add it.
- Property website: not available yet. The kit shows it as not available instead of skipping it quietly.

Each step runs on its own and its outcome is kept as it finishes. The kit shows every step as done, failed, not available or not run, with the reason, and you can retry just the steps that failed. A step that already made something is never made twice.

From the Help Center: **What is the listing launch kit?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

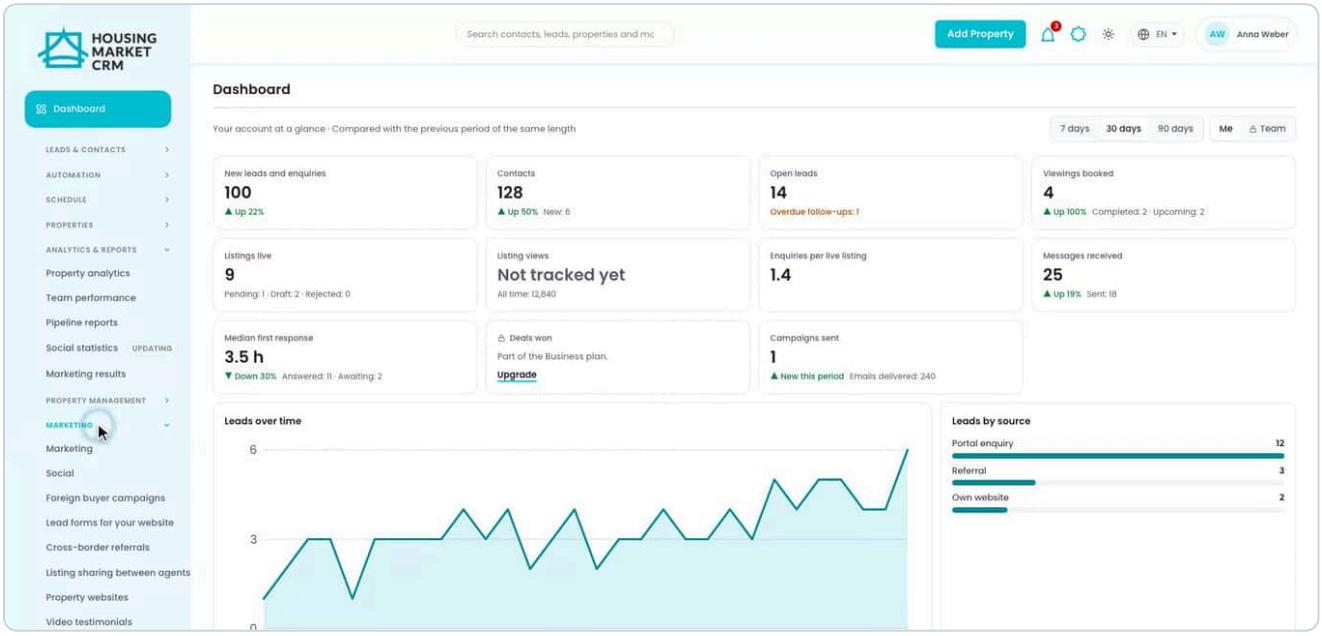


Figure 138.1 · Screen recorded 29 October 2026

2 Click **Marketing**.

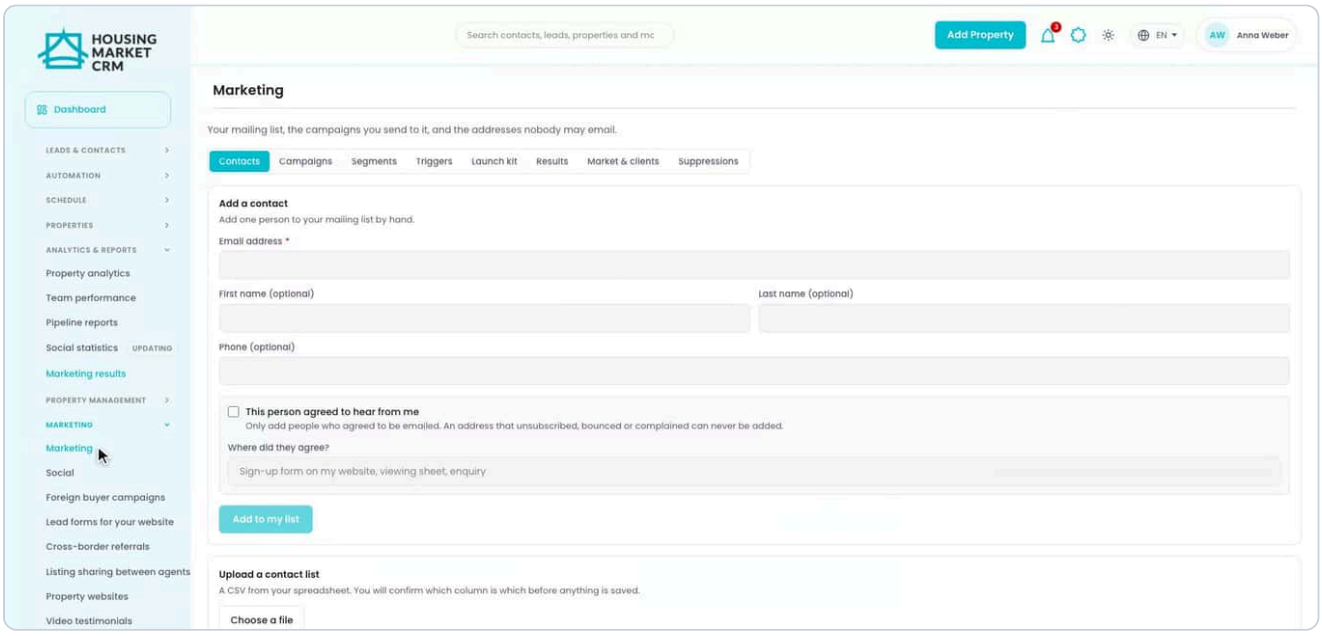


Figure 138.2 · Screen recorded 29 October 2026

3 Open the **Launch kit** tab.

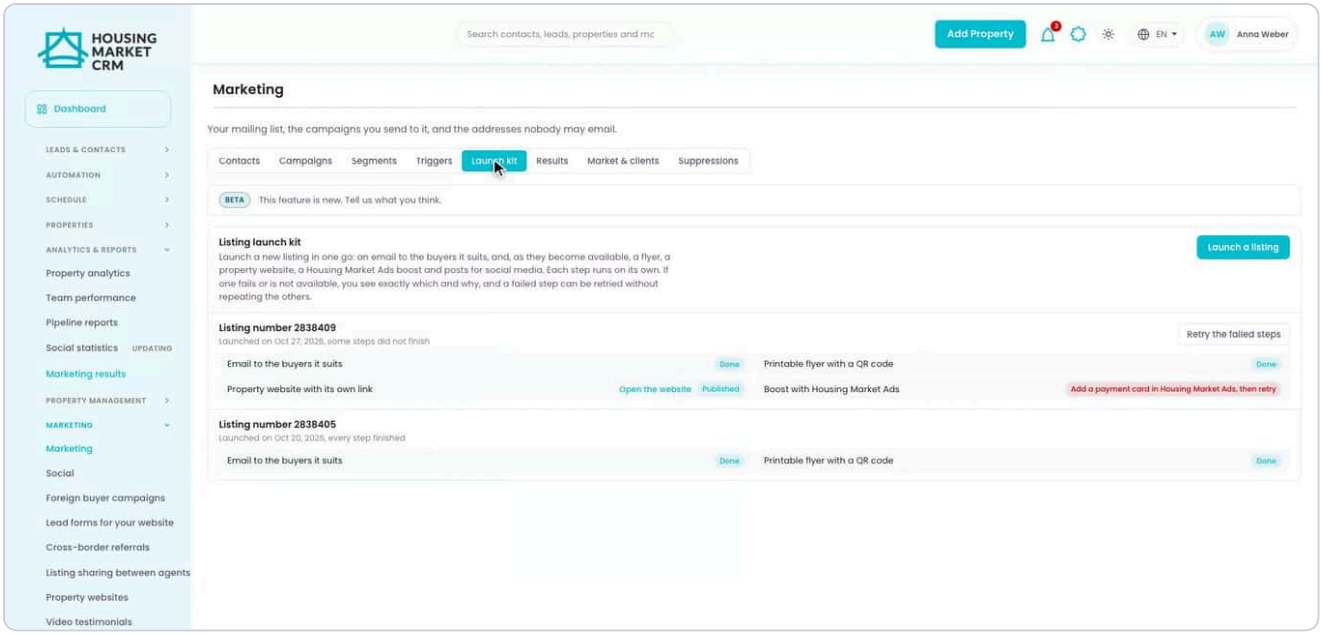


Figure 138.3 · Screen recorded 29 October 2026

4 This feature is new and shows a **Beta** badge while we refine it.

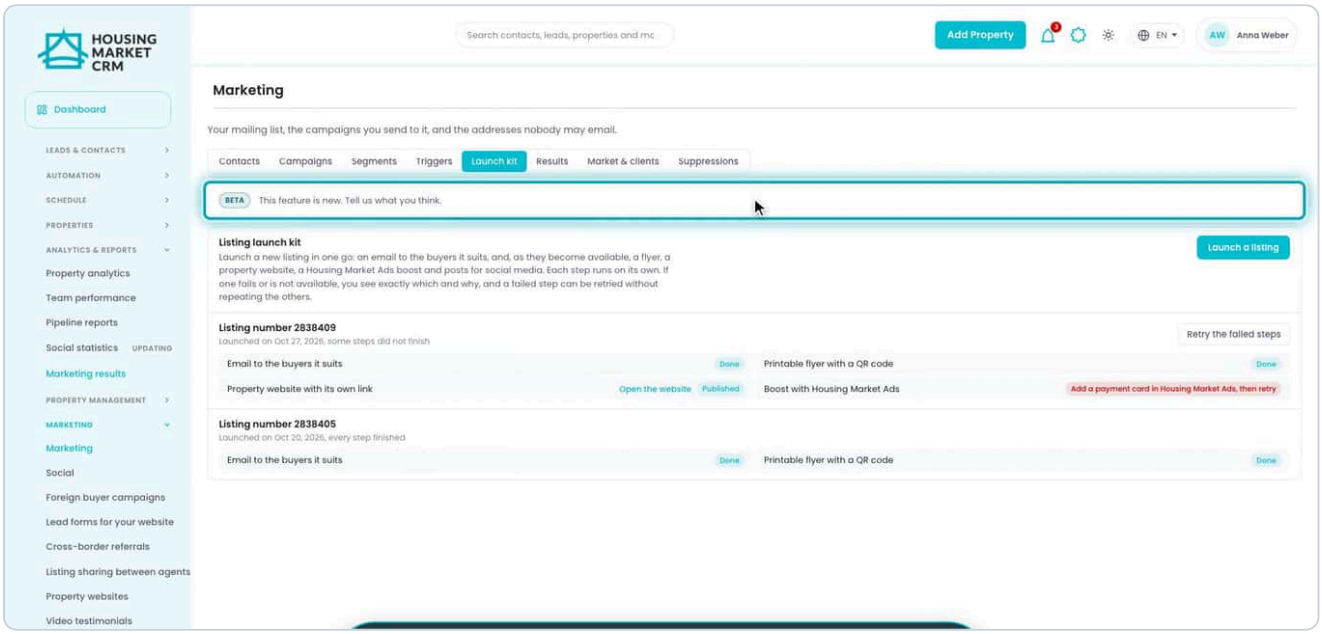


Figure 138.4 · Screen recorded 29 October 2026

5 Launch a new listing **in one go**. Each step runs on its own.

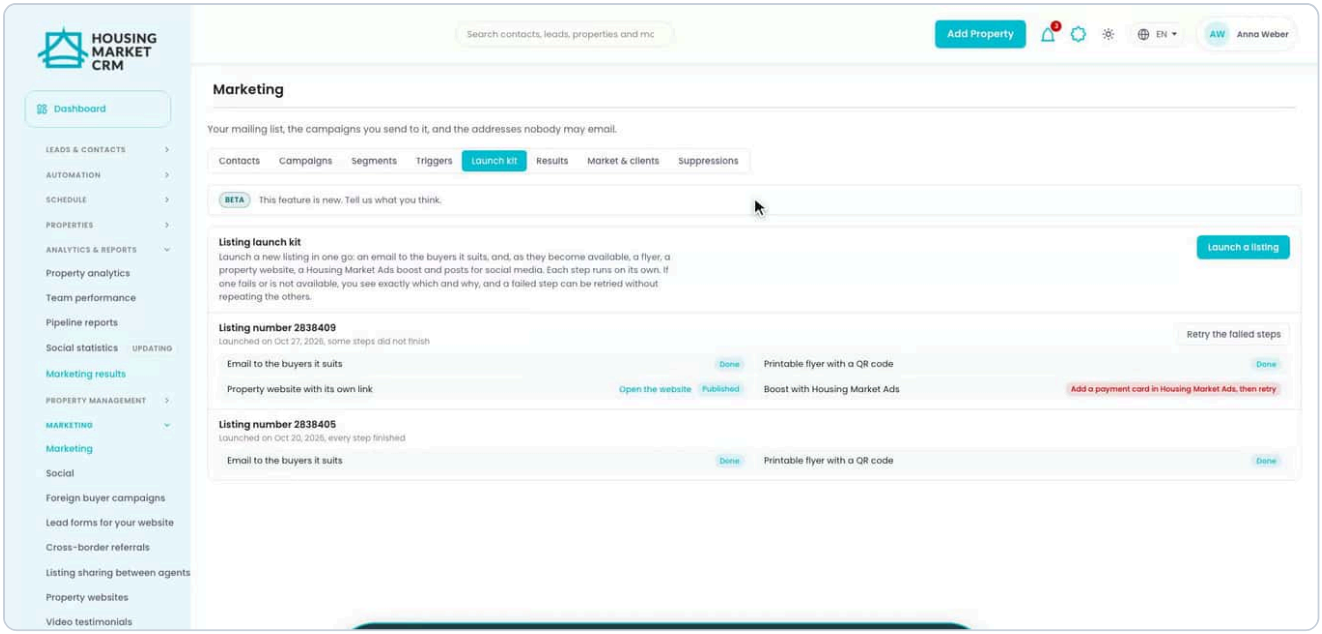


Figure 138.5 · Screen recorded 29 October 2026

6 Each launch lists its **steps** and the result of each.

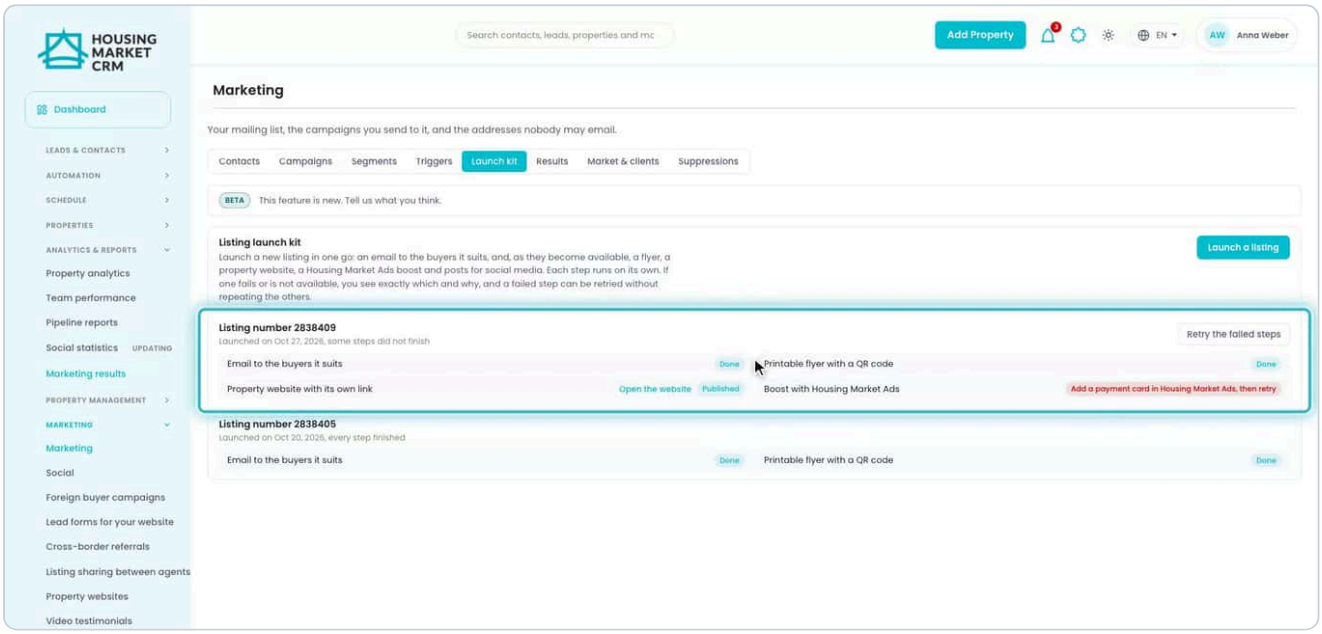


Figure 138.6 · Screen recorded 29 October 2026

7 A step that failed says **why**.

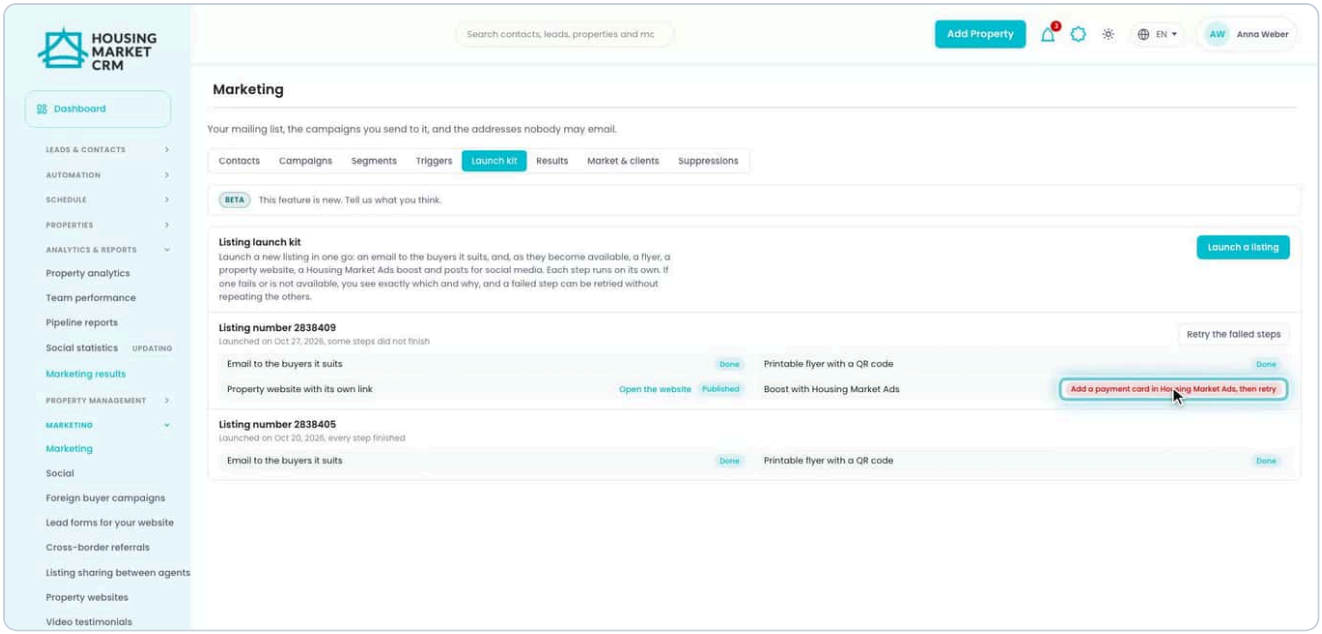


Figure 138.7 · Screen recorded 29 October 2026

8 Fix the cause, then **retry only the failed step**. The others are not repeated.

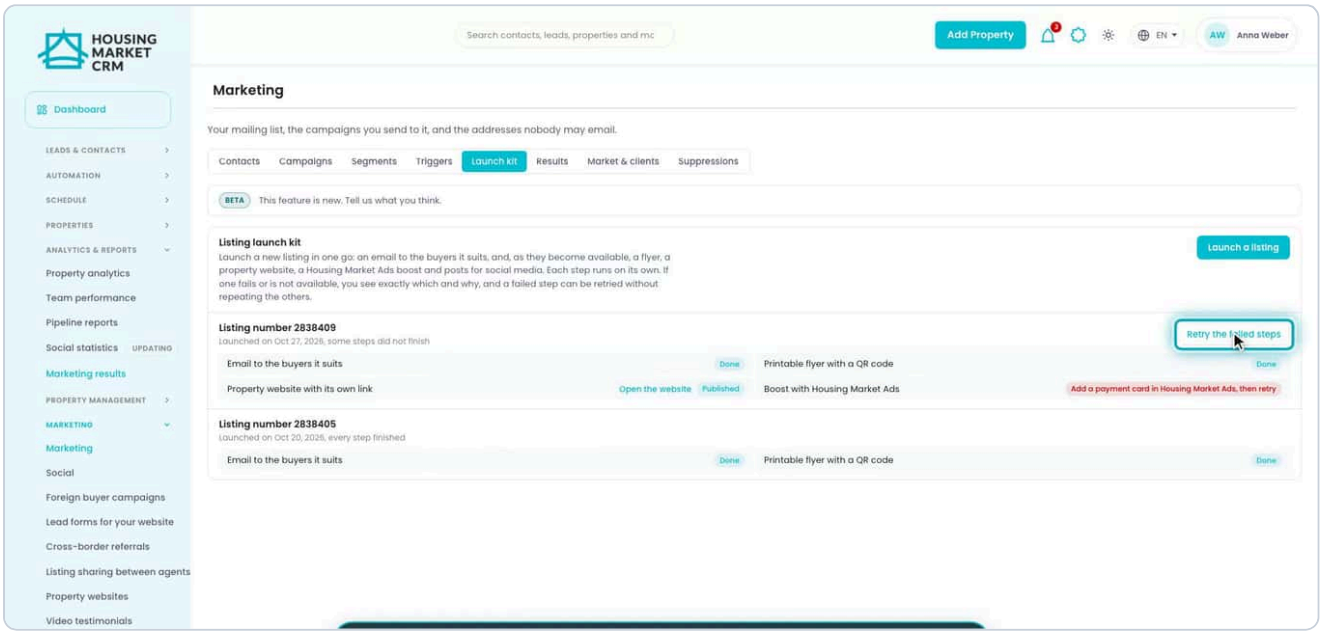


Figure 138.8 · Screen recorded 29 October 2026

9 A published step hands you its **link**.

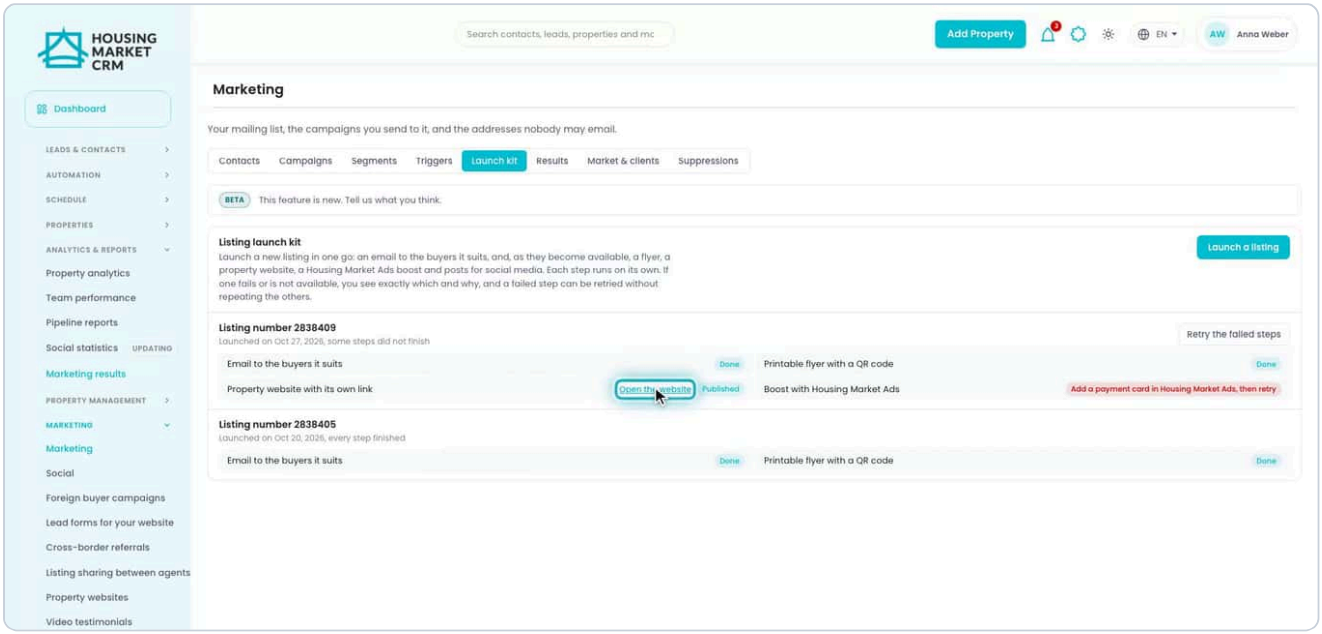


Figure 138.9 · Screen recorded 29 October 2026

10 Click **Launch a listing**.

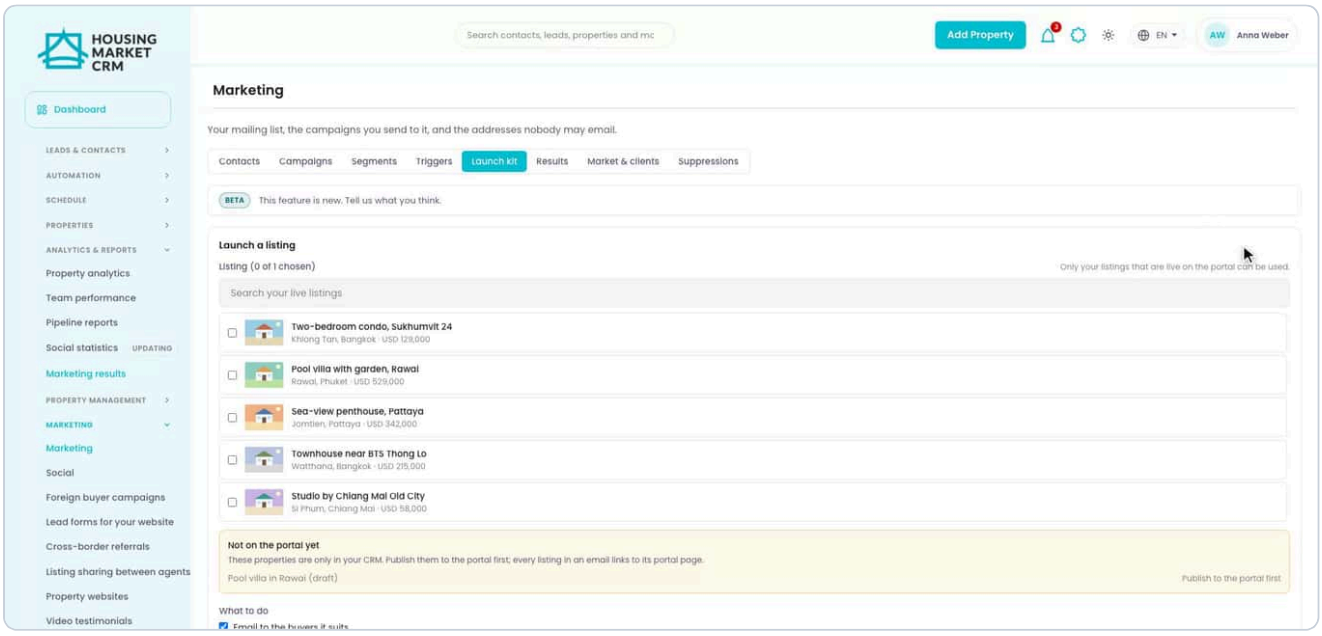


Figure 138.10 · Screen recorded 29 October 2026

11 Choose **one live listing**.

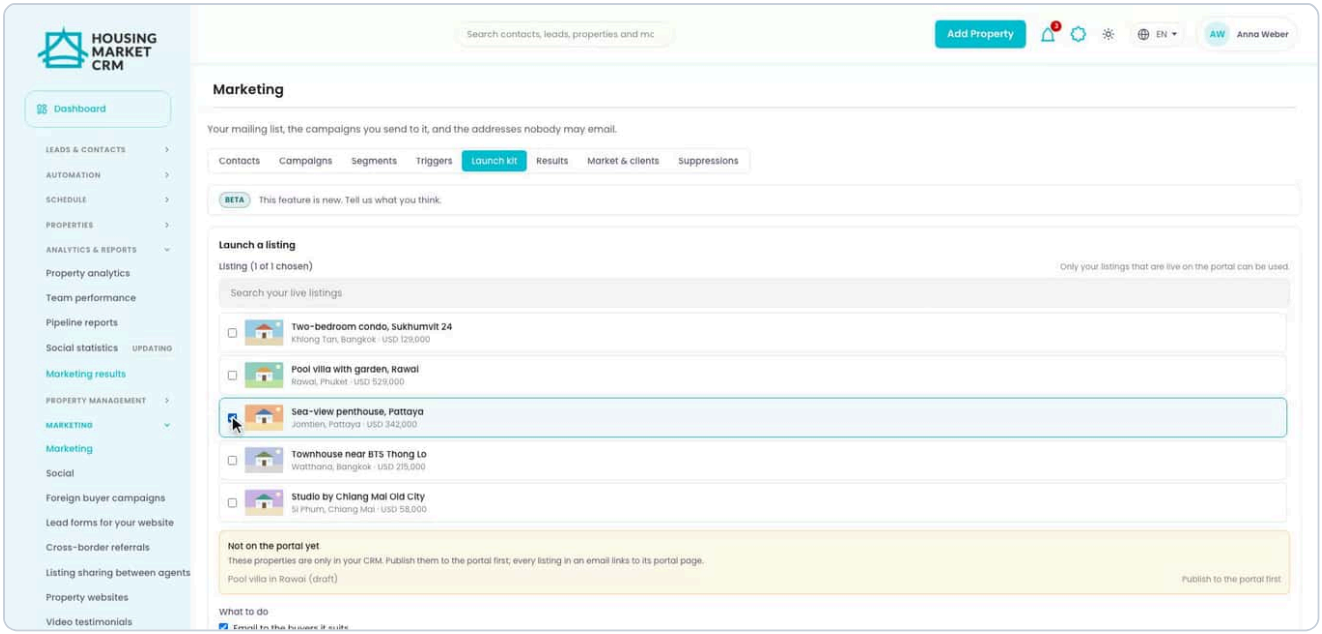


Figure 138.11 · Screen recorded 29 October 2026

12 Tick the **steps** you want.

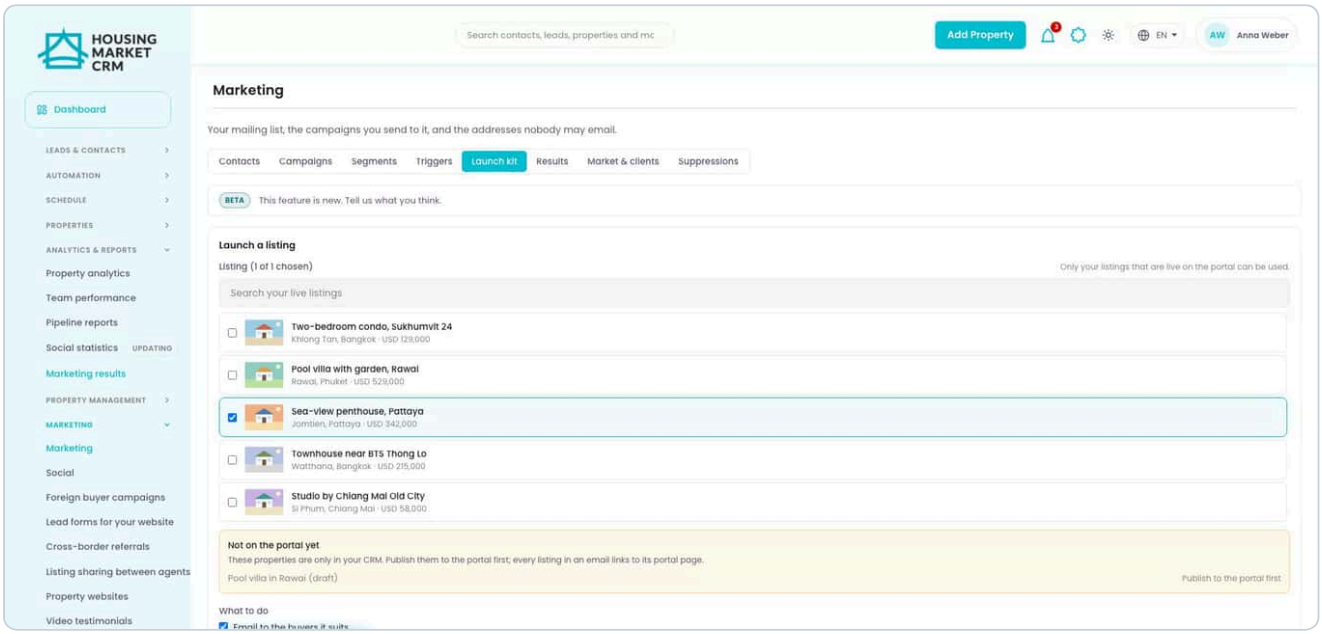


Figure 138.12 · Screen recorded 29 October 2026

13 Add the **printable flyer**.

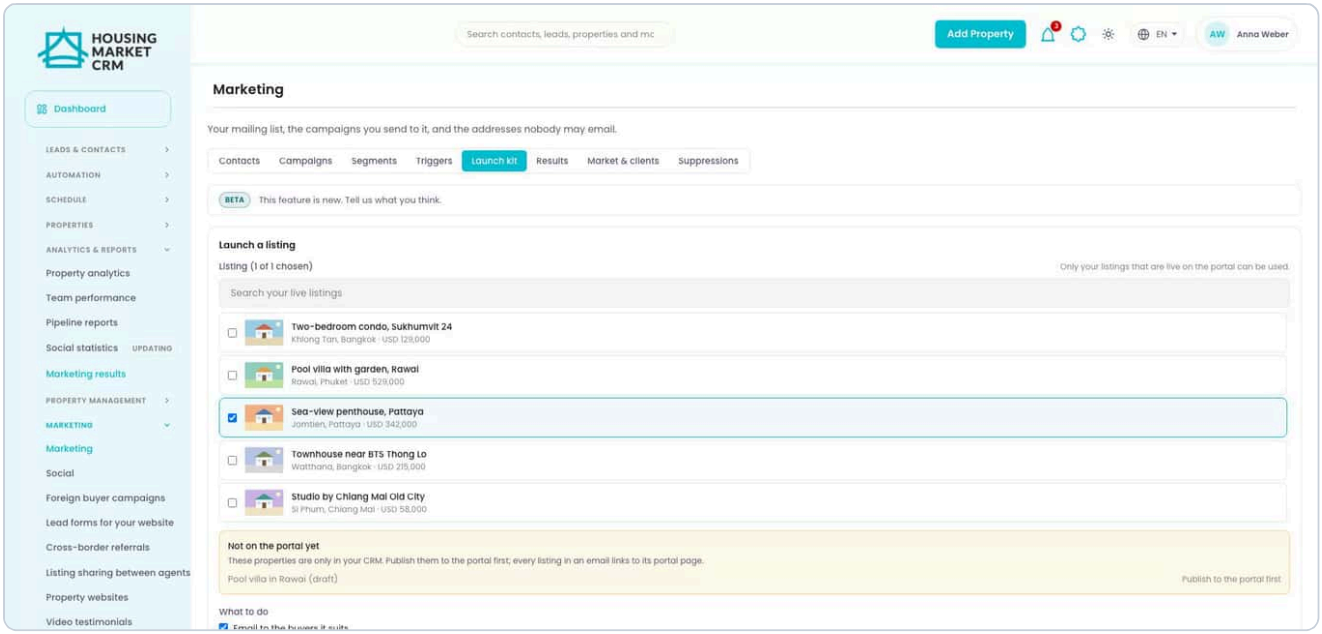


Figure 138.13 · Screen recorded 29 October 2026

14 Add the **property website**.

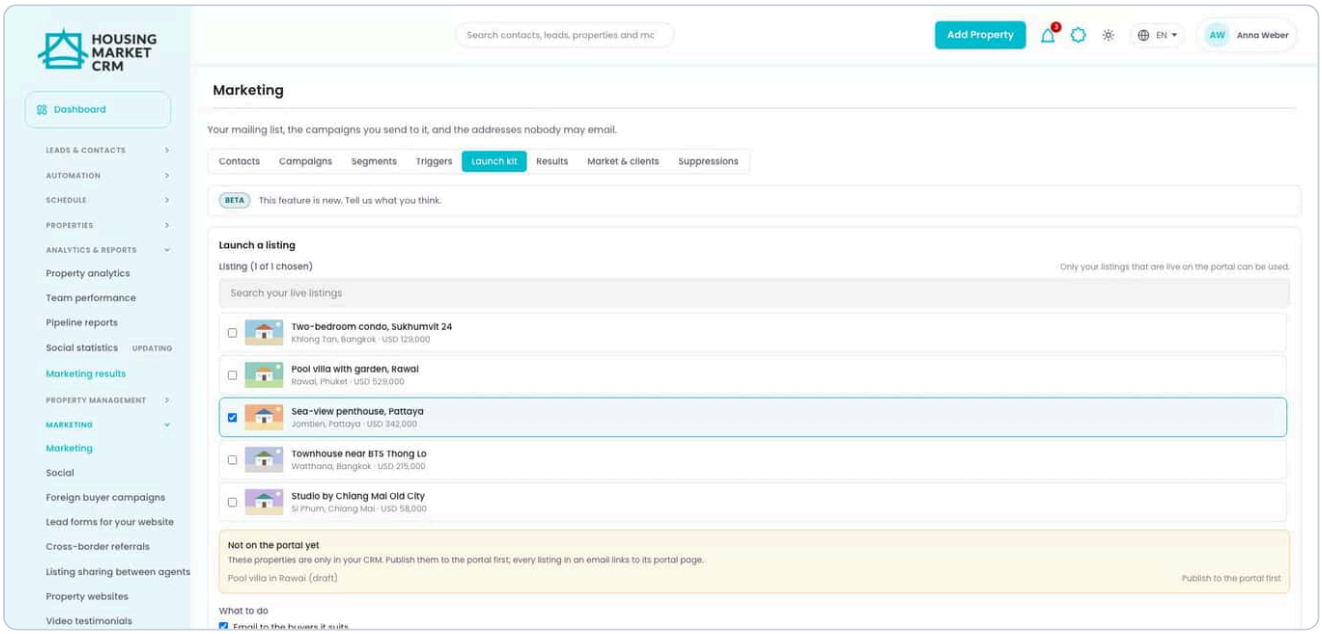


Figure 138.14 · Screen recorded 29 October 2026

15 A step that is **not available** says so, and cannot be ticked.

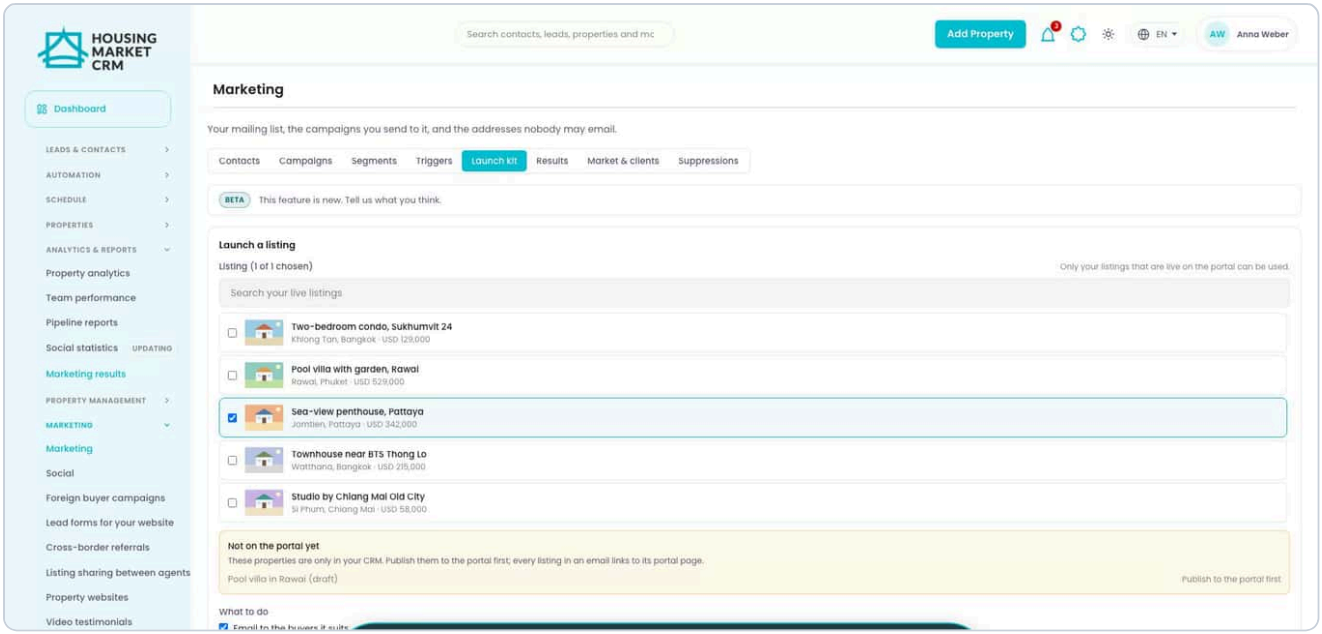


Figure 138.15 · Screen recorded 29 October 2026

16 Write the **subject line** of the email.

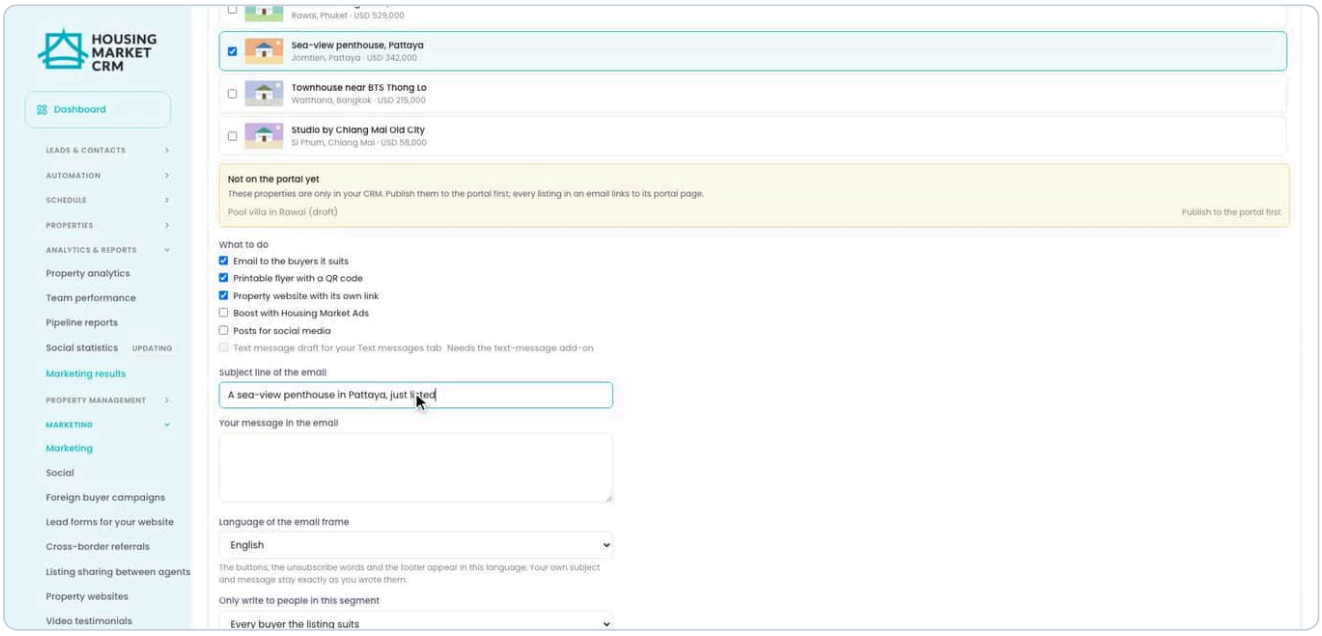


Figure 138.16 · Screen recorded 29 October 2026

17 Add **your message**.

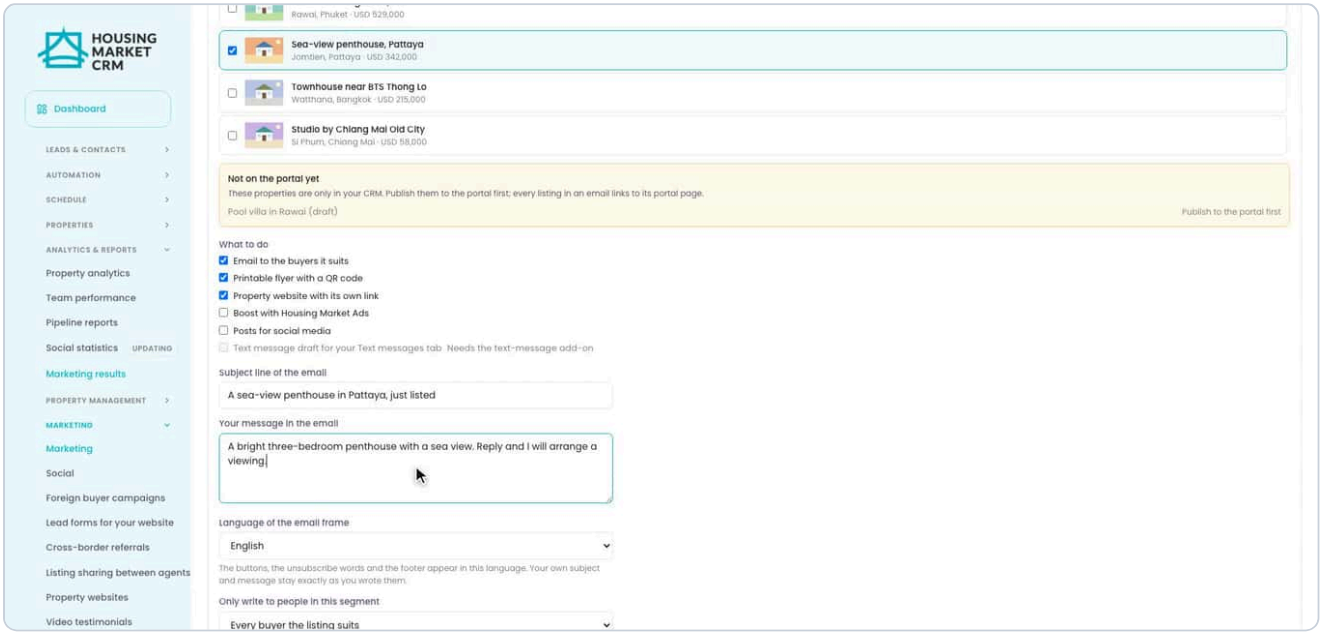


Figure 138.17 · Screen recorded 29 October 2026

18 The email goes to the buyers the listing suits, or only to **one of your segments**.

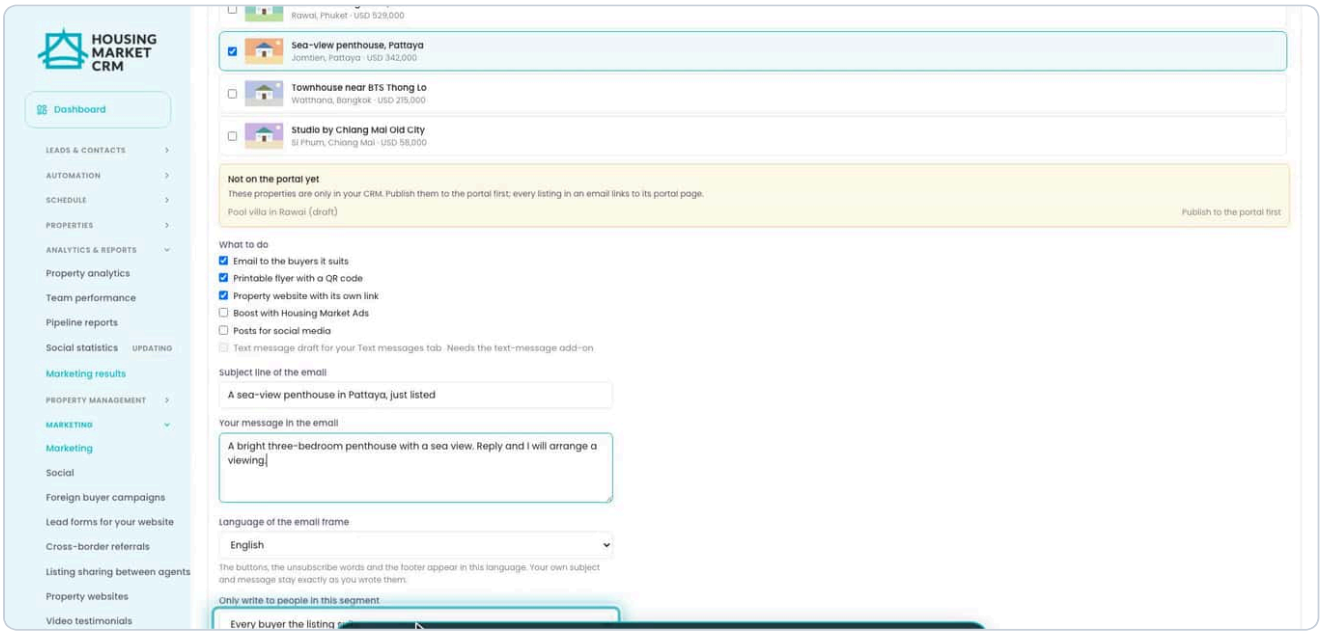


Figure 138.18 · Screen recorded 29 October 2026

19 Confirm that **the buyers asked to hear from you**.

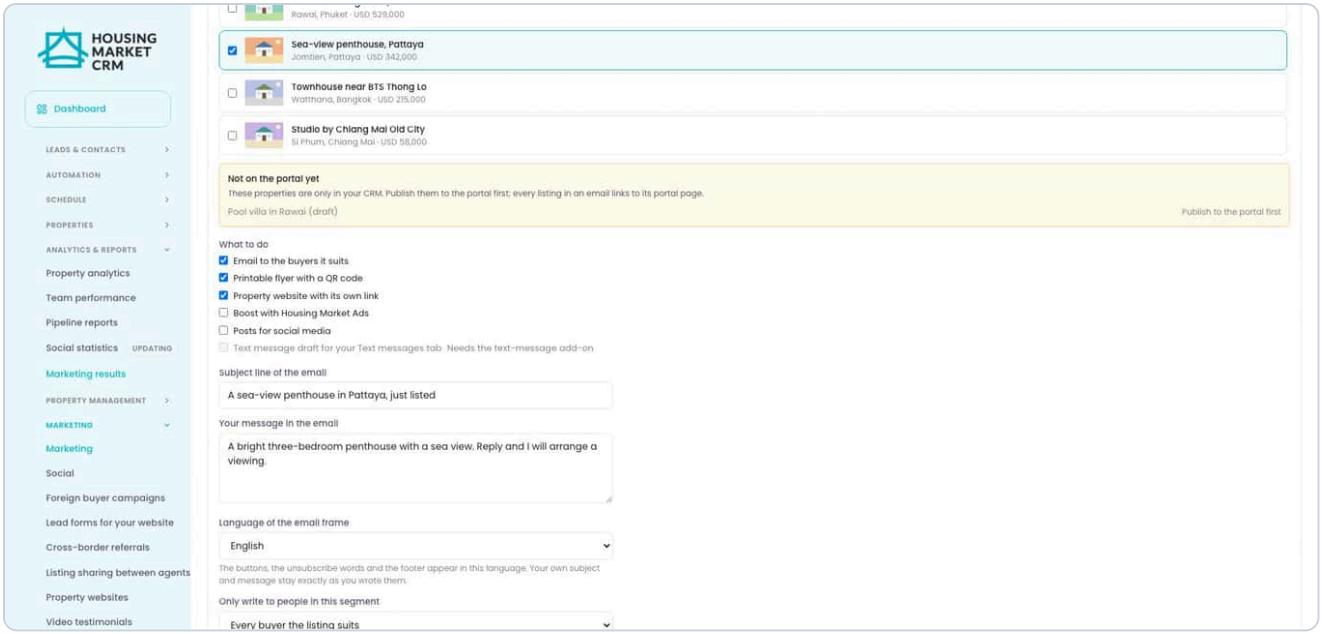


Figure 138.19 · Screen recorded 29 October 2026

20 Then **Launch the listing** unlocks. We stop here: **nothing is sent** in this video.

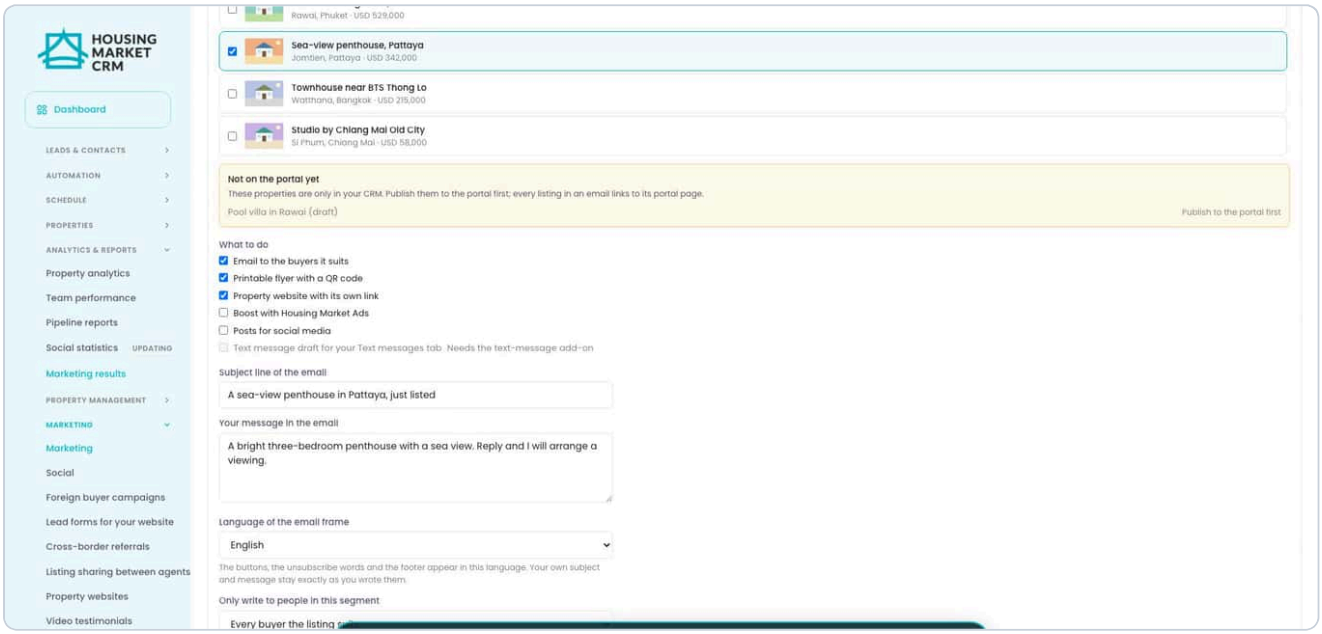


Figure 138.20 · Screen recorded 29 October 2026

21 Click **Cancel** to leave the launch unsent.

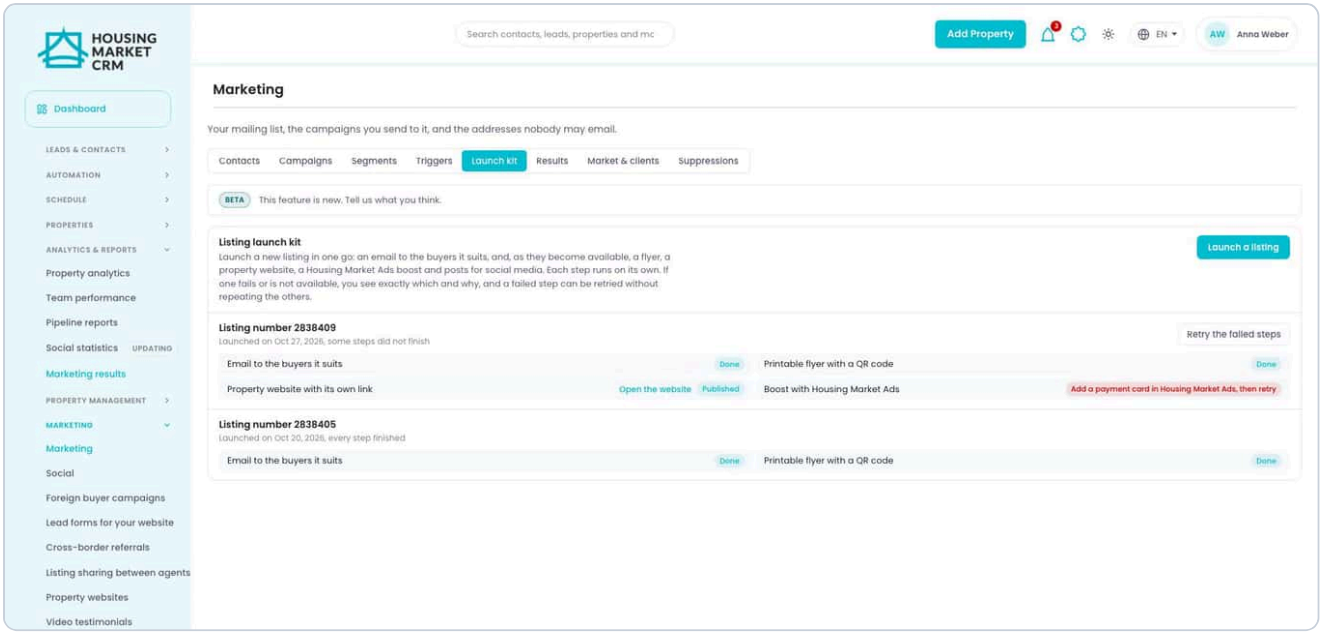


Figure 138.21 · Screen recorded 29 October 2026

22 The launch kit is part of the **Pro** plan.

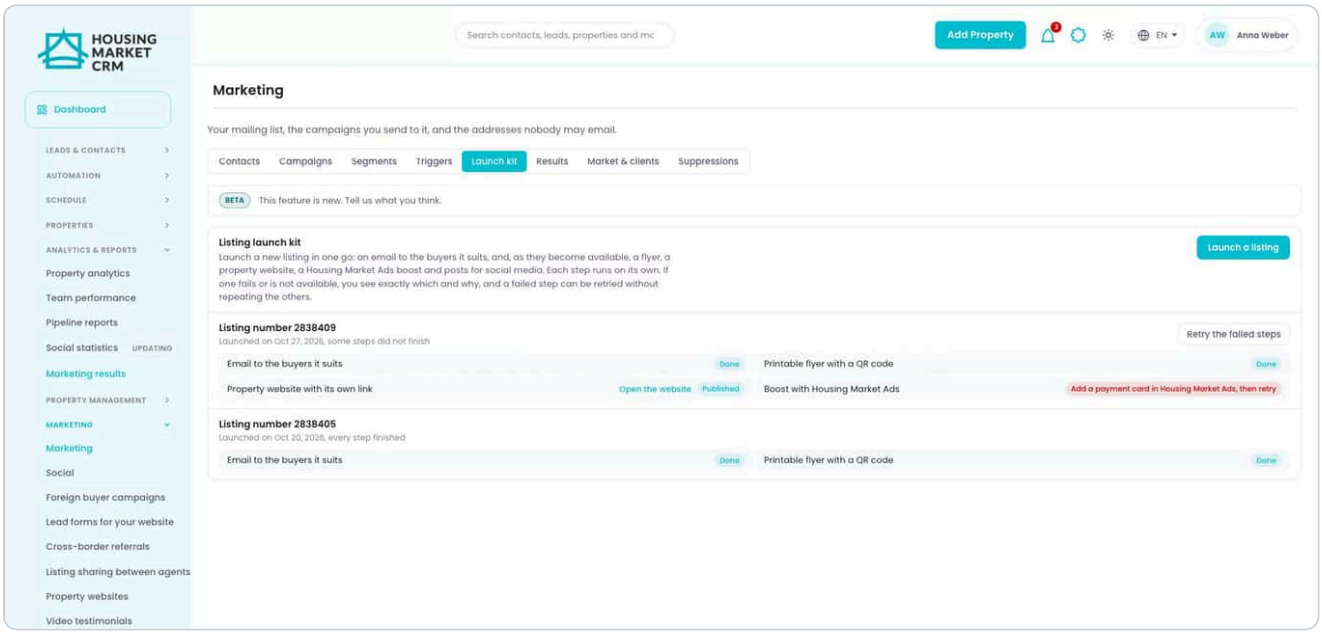


Figure 138.22 · Screen recorded 29 October 2026

139 CHAPTER 139

Read your marketing results

Pro and Business | For agents | Watch the video

OVERVIEW

For the last 7, 30 or 90 days: the emails you sent and what came of them, and the enquiries, viewings and closed deals that came through your marketing. It is part of Pro.

Open Marketing and then Results, and choose the last 7, 30 or 90 days. The tiles count the emails sent, opened, clicked, bounced and complained about, and the enquiries, viewings booked and deals closed that came through your marketing. A table shows the same by channel: email, social, ads, flyers and open houses, and websites. Your email campaigns are listed with their own figures.

Only enquiries that arrived through a link, a flyer, an open house, a social post, a website or an Ads campaign are counted. A portal enquiry, a phone call or an imported contact is not a marketing result. Deals are counted, not added up: the value of a deal is in its own currency and the tab does not total money.

The figures update every hour, so a new campaign or enquiry shows within an hour. Opens are approximate, because some mail apps load images in advance and others never do. A manager sees the figures of the whole office.

From the Help Center: **What does the marketing Results tab show?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

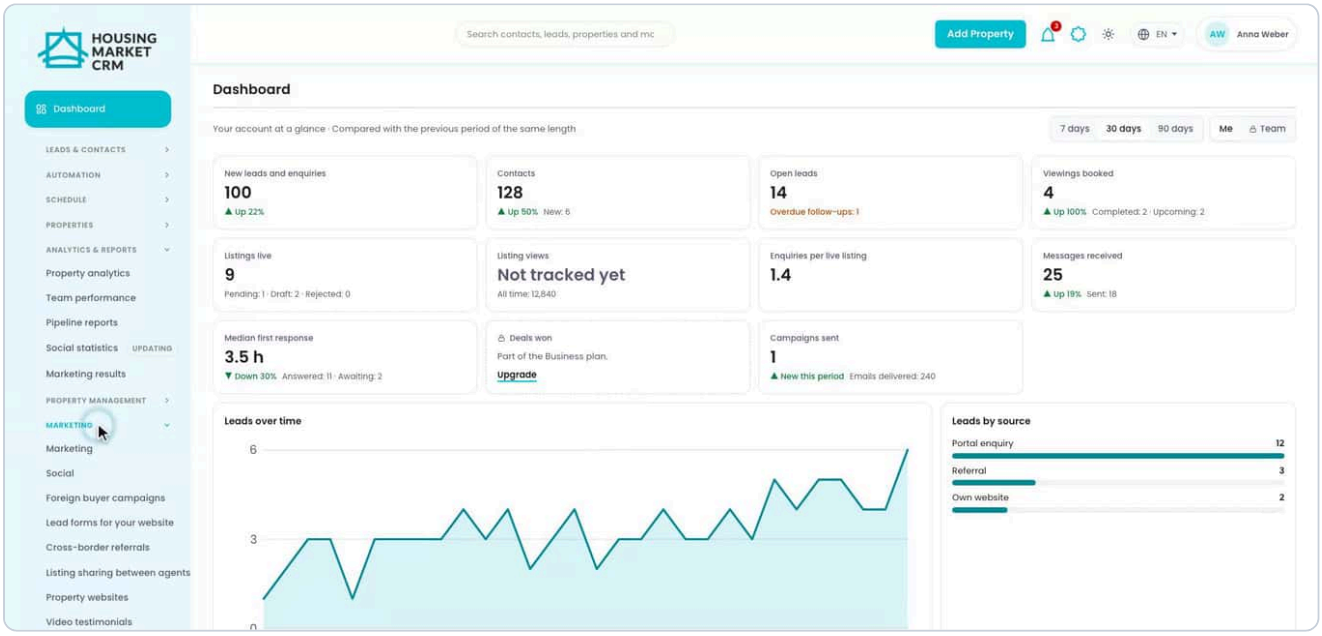


Figure 139.1 · Screen recorded 29 October 2026

2 Click **Marketing**.

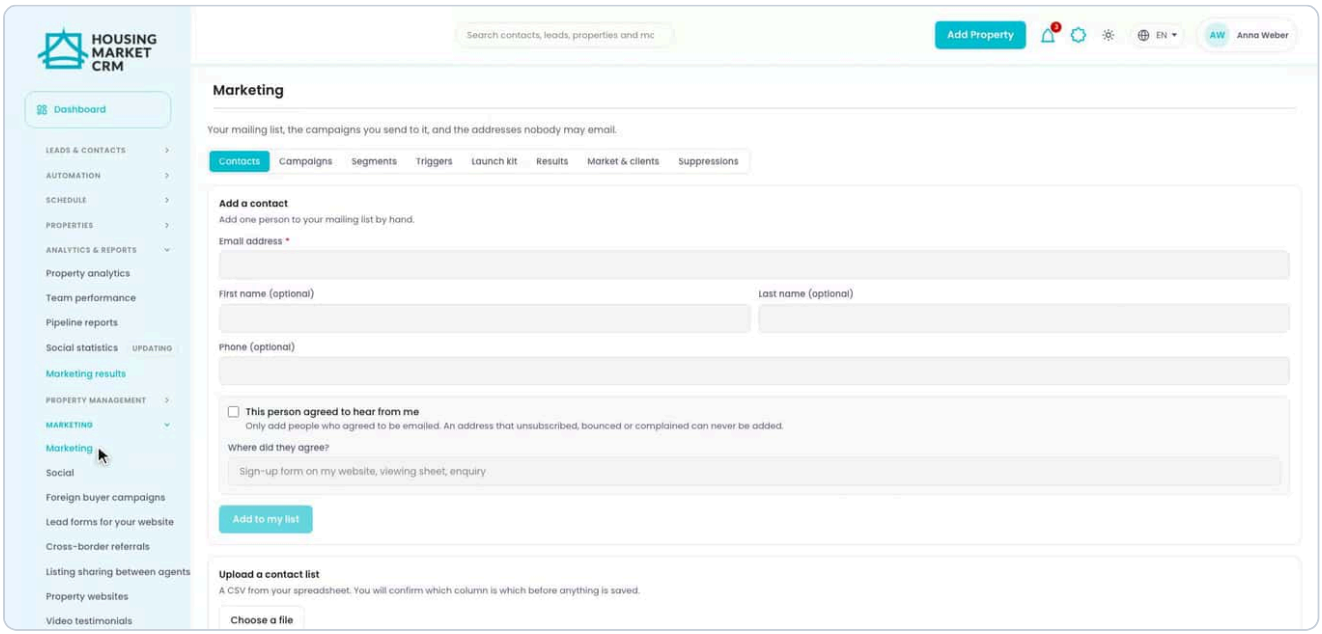


Figure 139.2 · Screen recorded 29 October 2026

3 Open the **Results** tab.

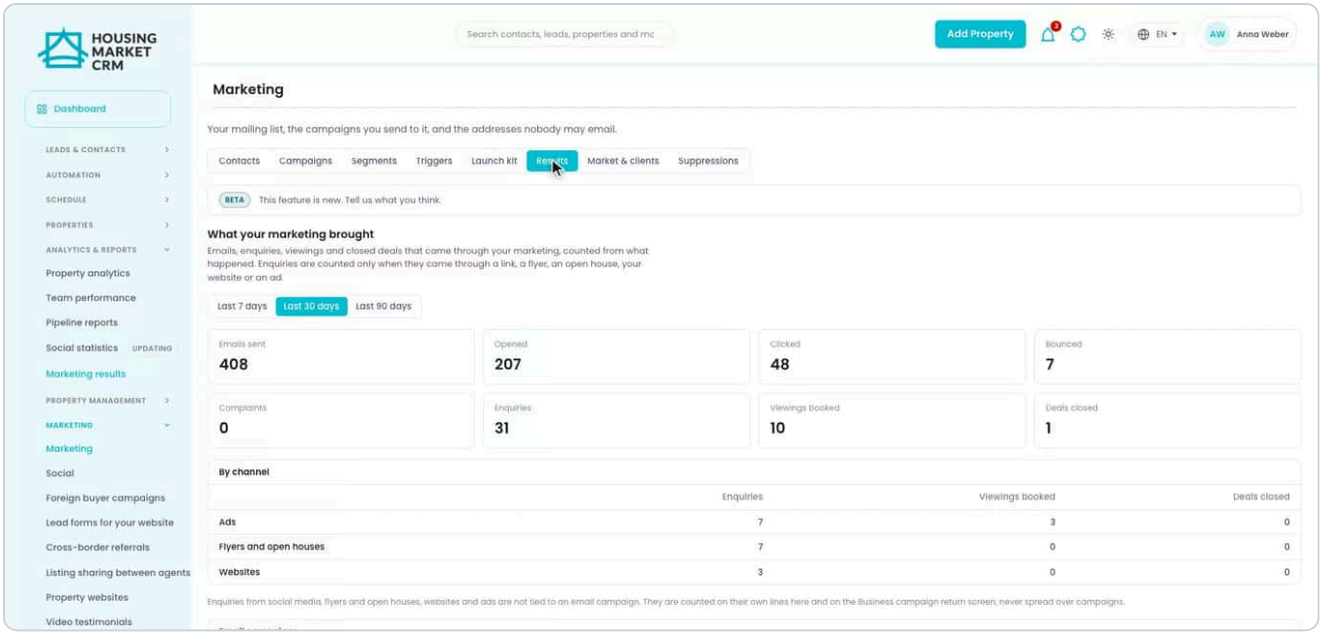


Figure 139.3 · Screen recorded 29 October 2026

4 This feature is new and shows a **Beta** badge while we refine it. The figures here are examples.

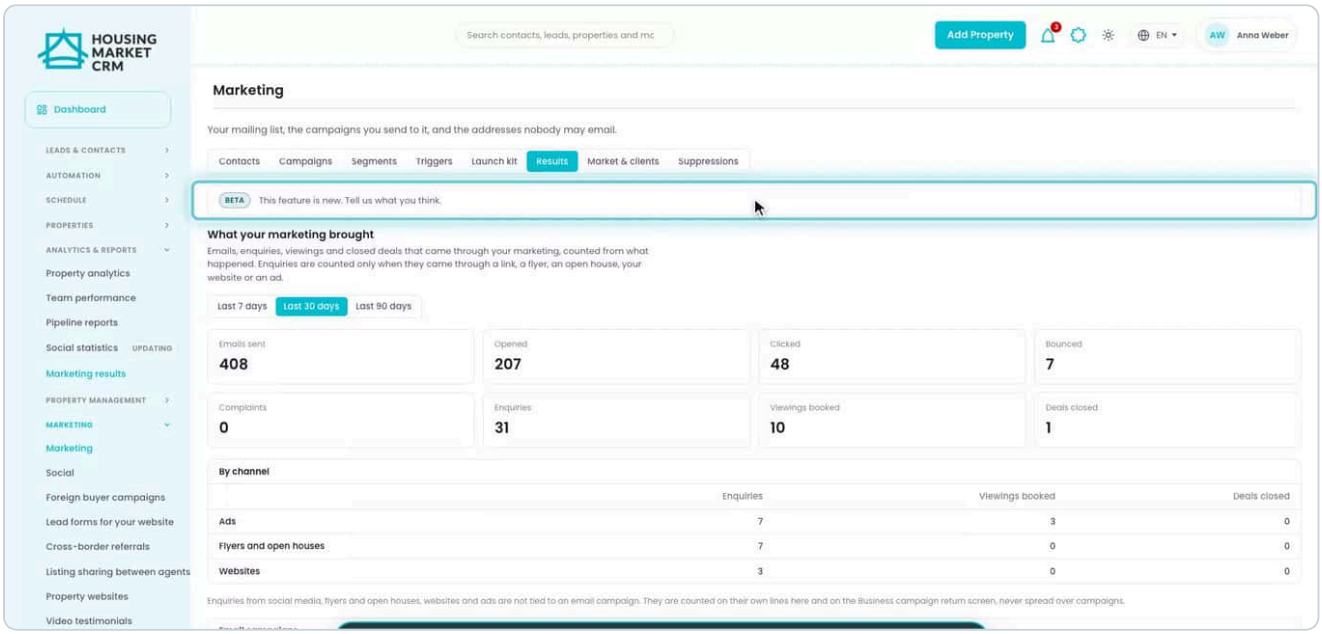


Figure 139.4 · Screen recorded 29 October 2026

5 You can also open it from **Marketing results** in the menu.

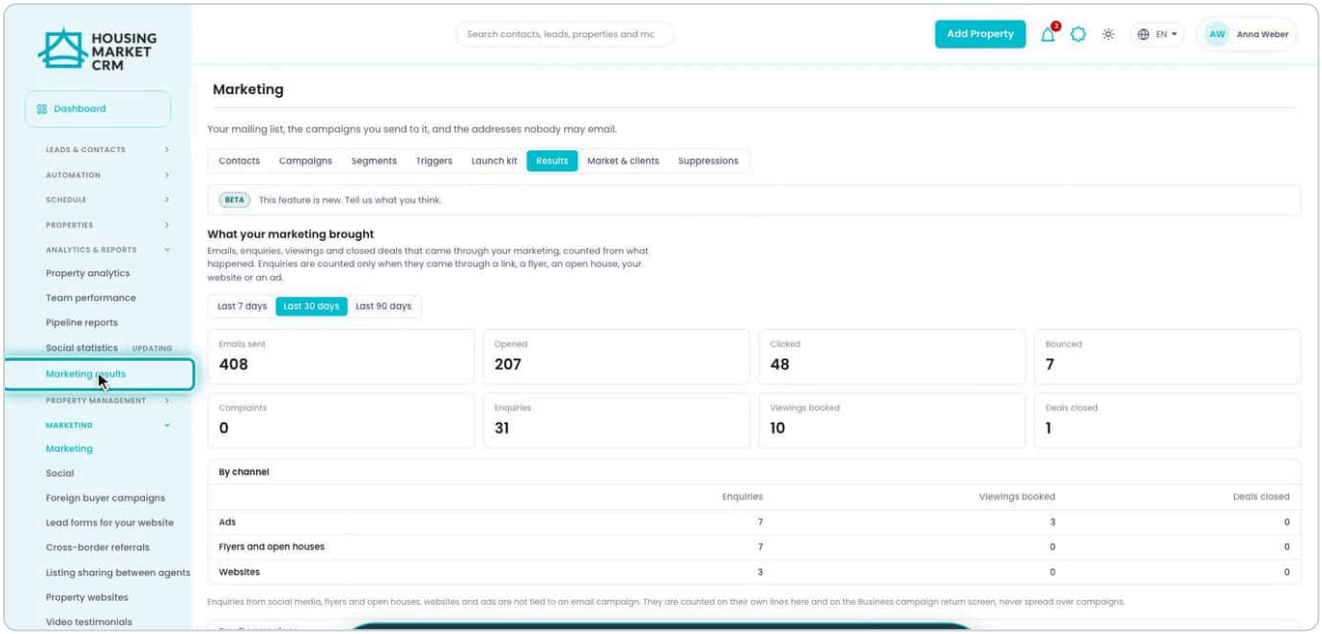


Figure 139.5 · Screen recorded 29 October 2026

6 See what your marketing **brought**, counted from what happened.

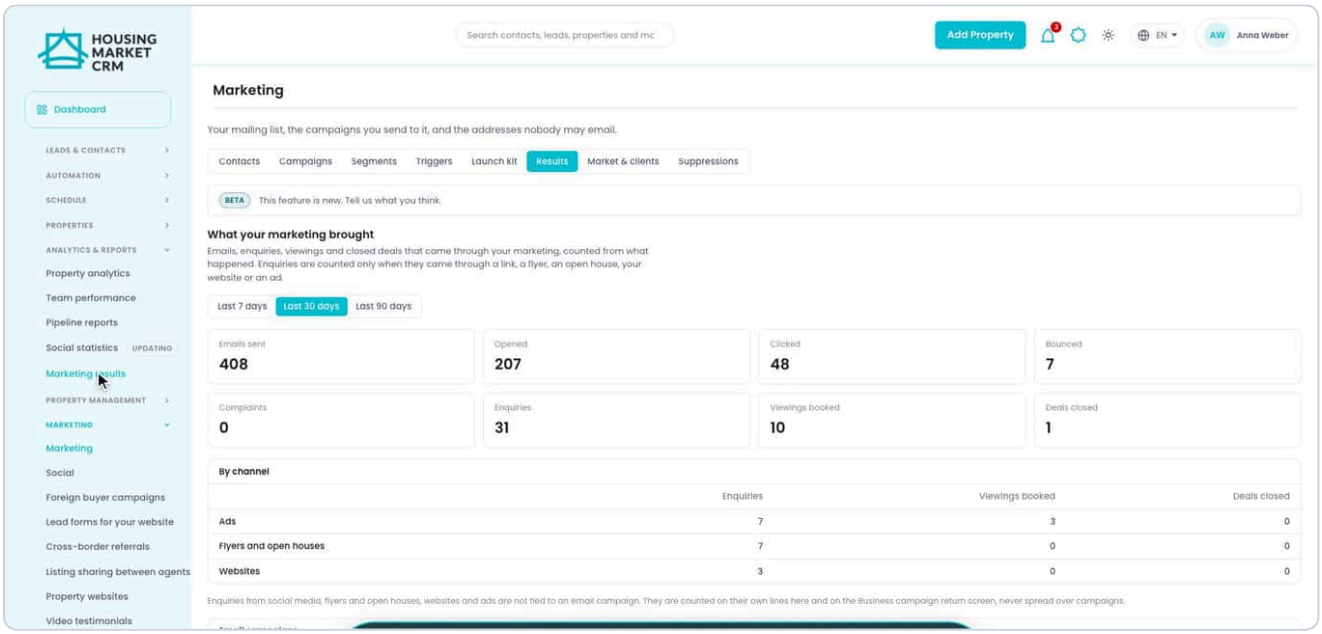


Figure 139.6 · Screen recorded 29 October 2026

7 The totals count **emails sent, opened and clicked bounces and complaints**.

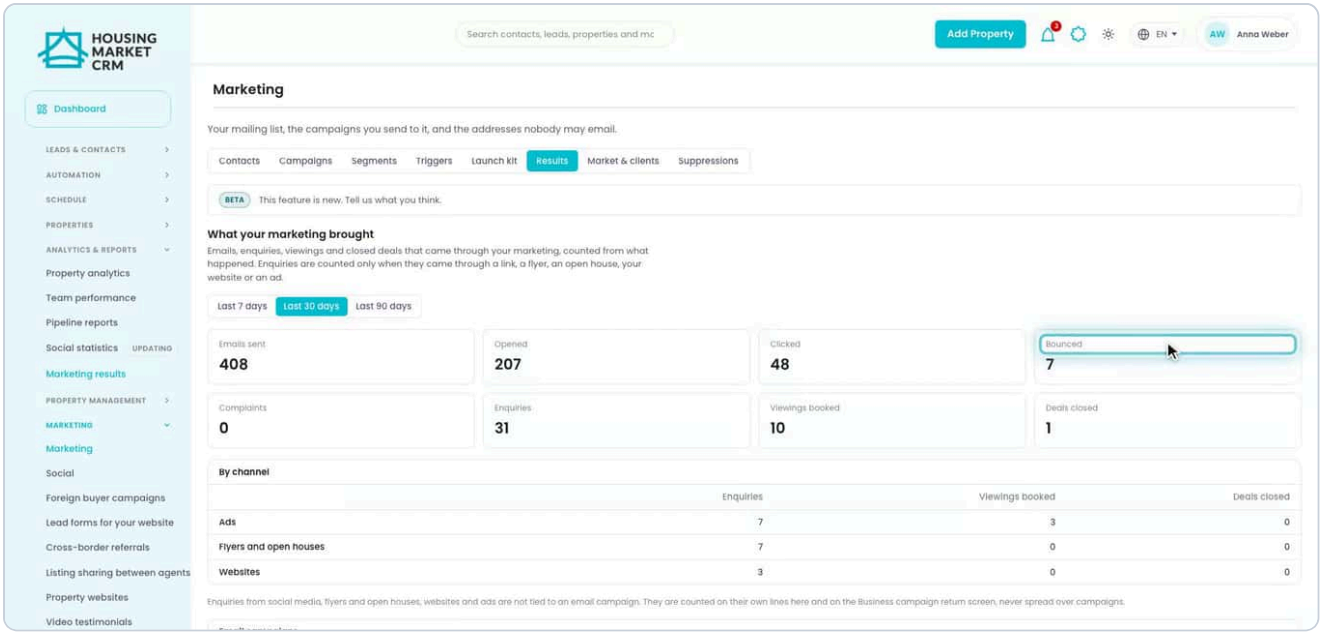


Figure 139.7 · Screen recorded 29 October 2026

8 and the **enquiries, viewings and deals** that followed.

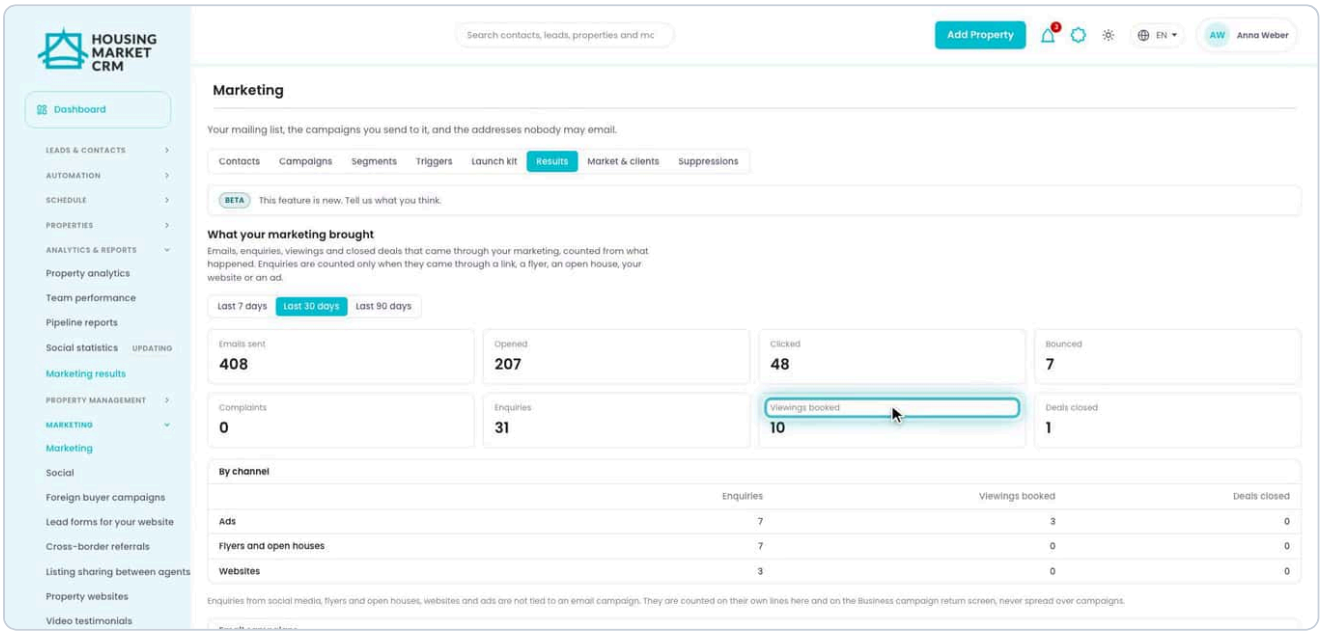


Figure 139.8 · Screen recorded 29 October 2026

9 The table **by channel** shows where enquiries came from.

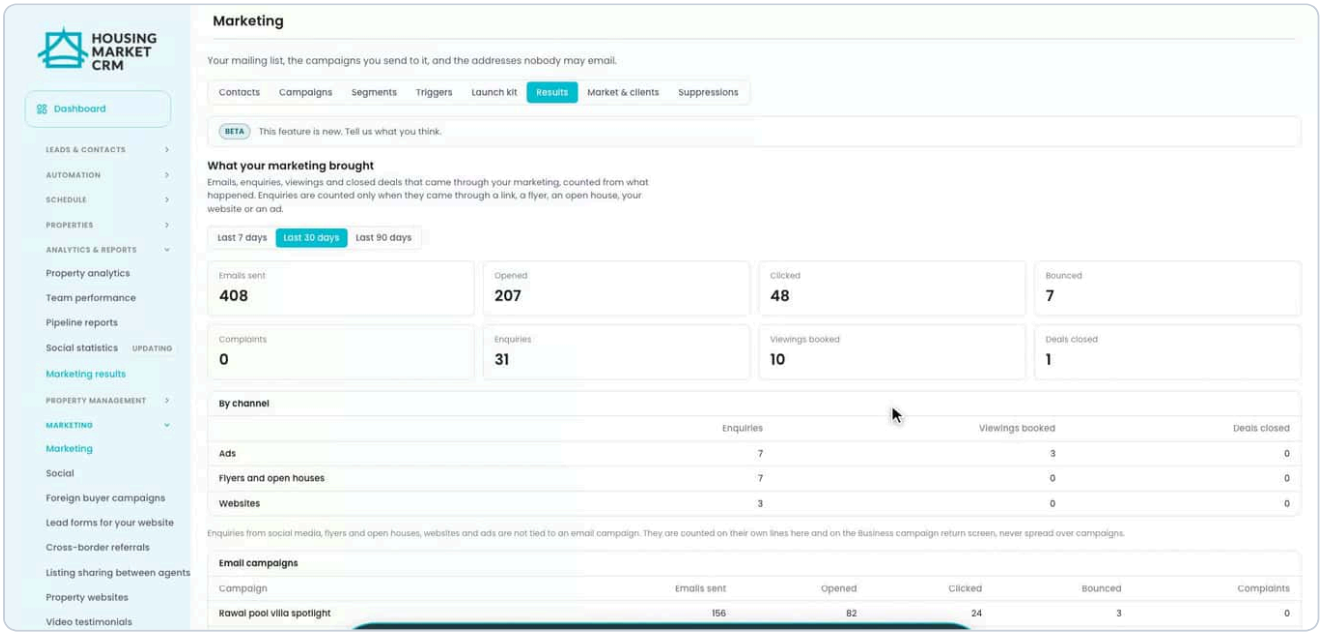


Figure 139.9 · Screen recorded 29 October 2026

10 Ads, flyers, open houses and websites each get **their own line**.

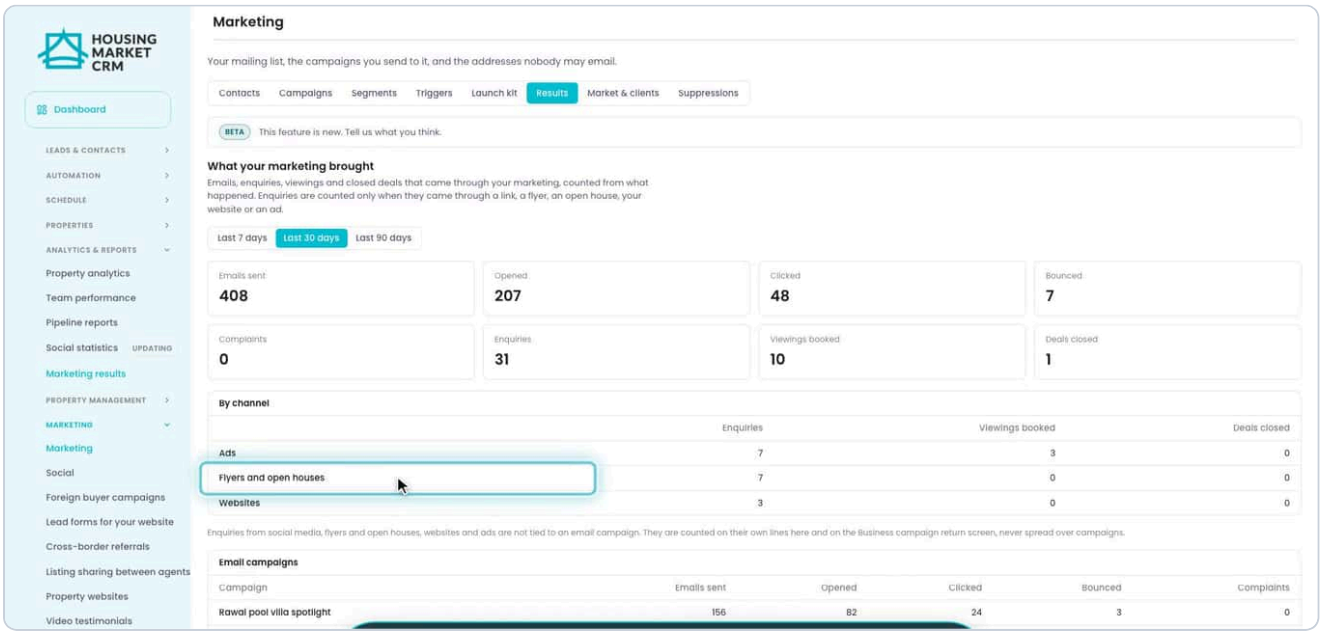


Figure 139.10 · Screen recorded 29 October 2026

11 They are **never spread over email campaigns**.

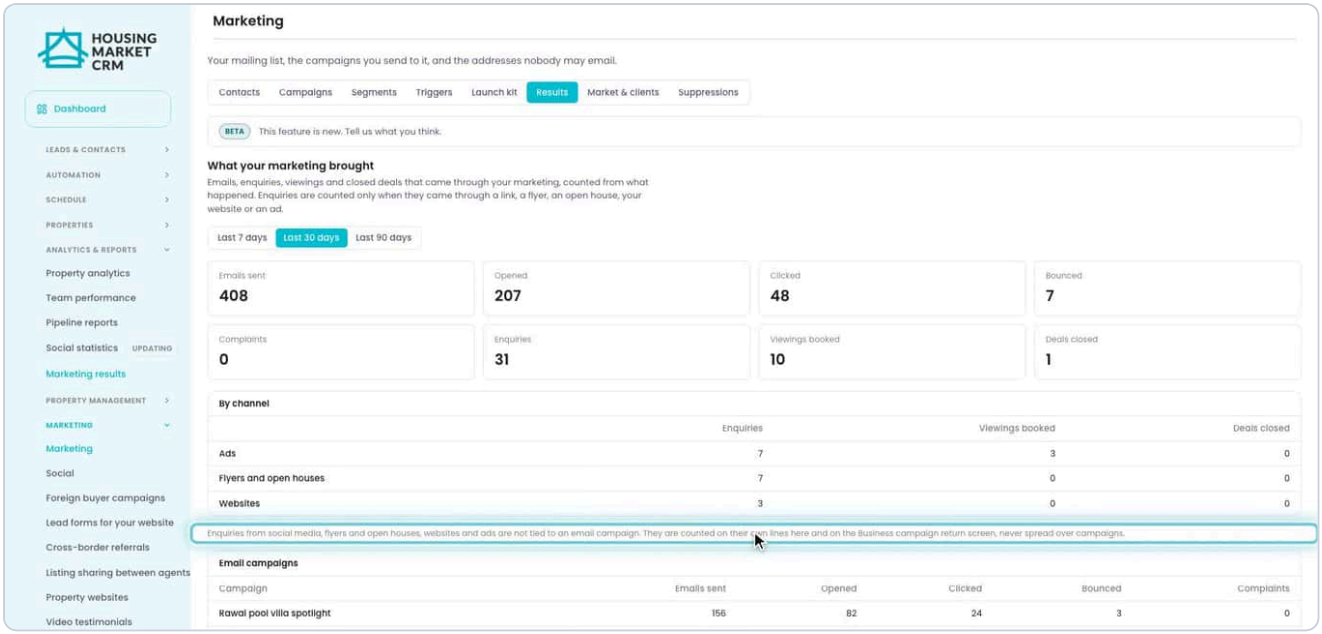


Figure 139.11 · Screen recorded 29 October 2026

12 Each **email campaign** has its own row.

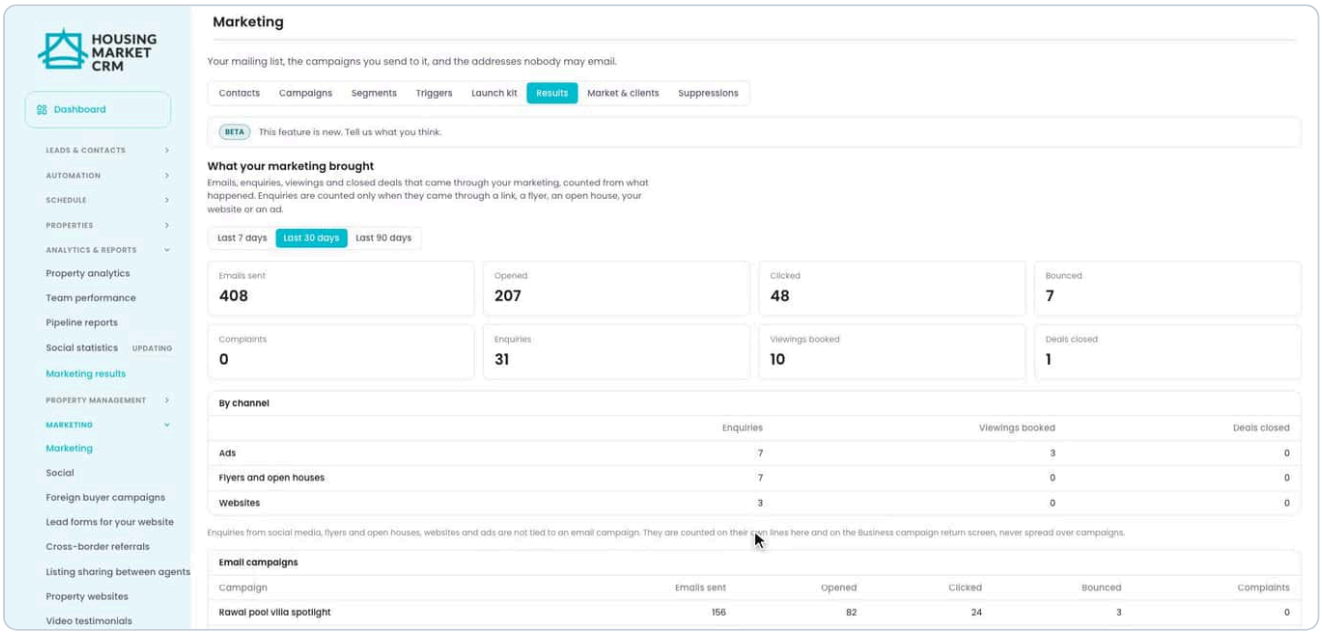


Figure 139.12 · Screen recorded 29 October 2026

13 Sent, opened, clicked, bounced and **complaints**.

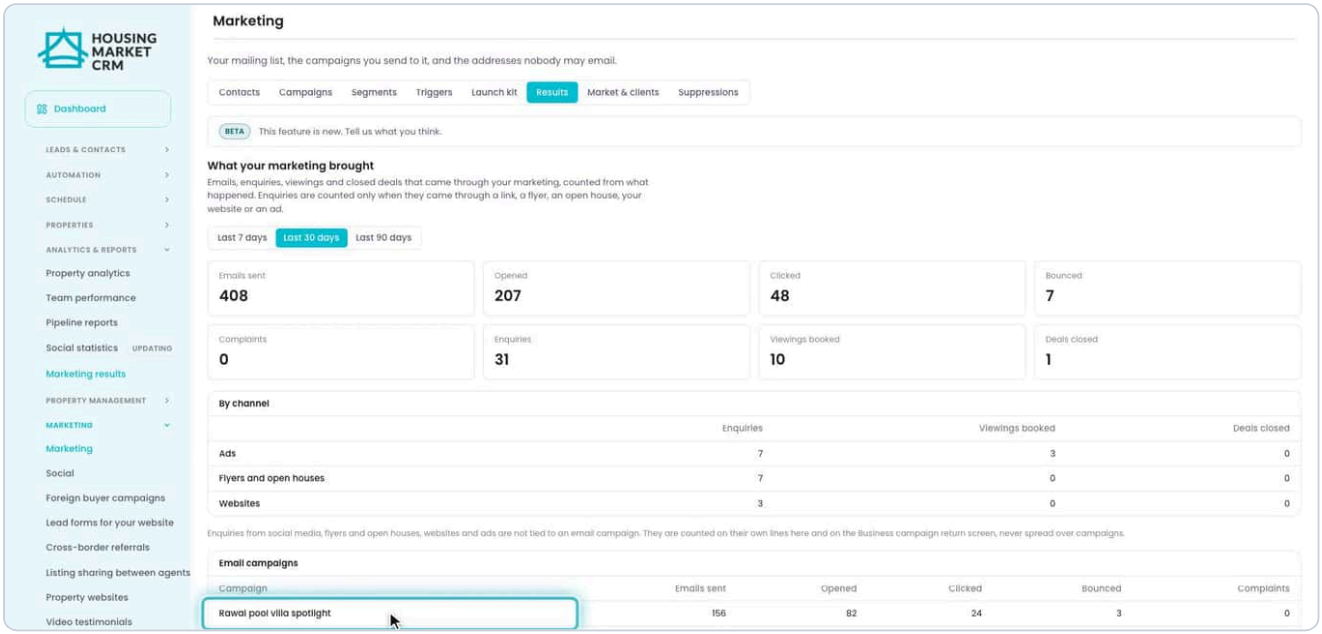


Figure 139.13 · Screen recorded 29 October 2026

14 **Opens are approximate**: some mail apps load images in advance.

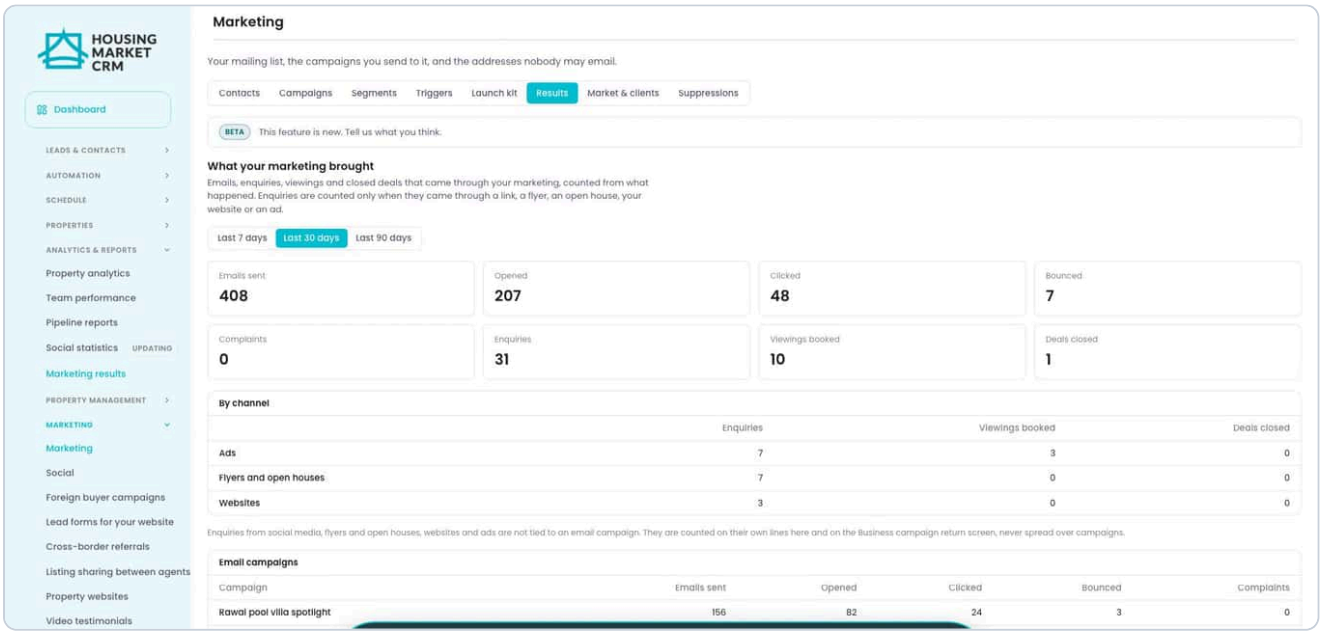


Figure 139.14 · Screen recorded 29 October 2026

15 The figures **update every hour**.

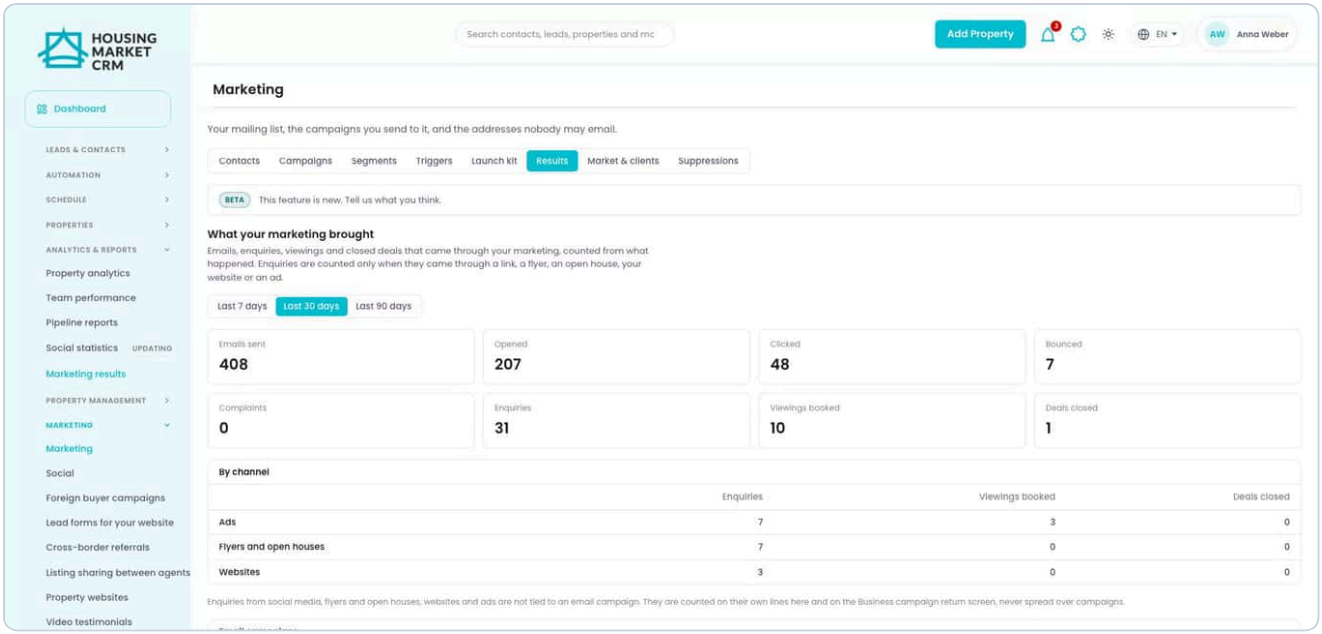


Figure 139.15 · Screen recorded 29 October 2026

16 Choose **Last 7 days**.

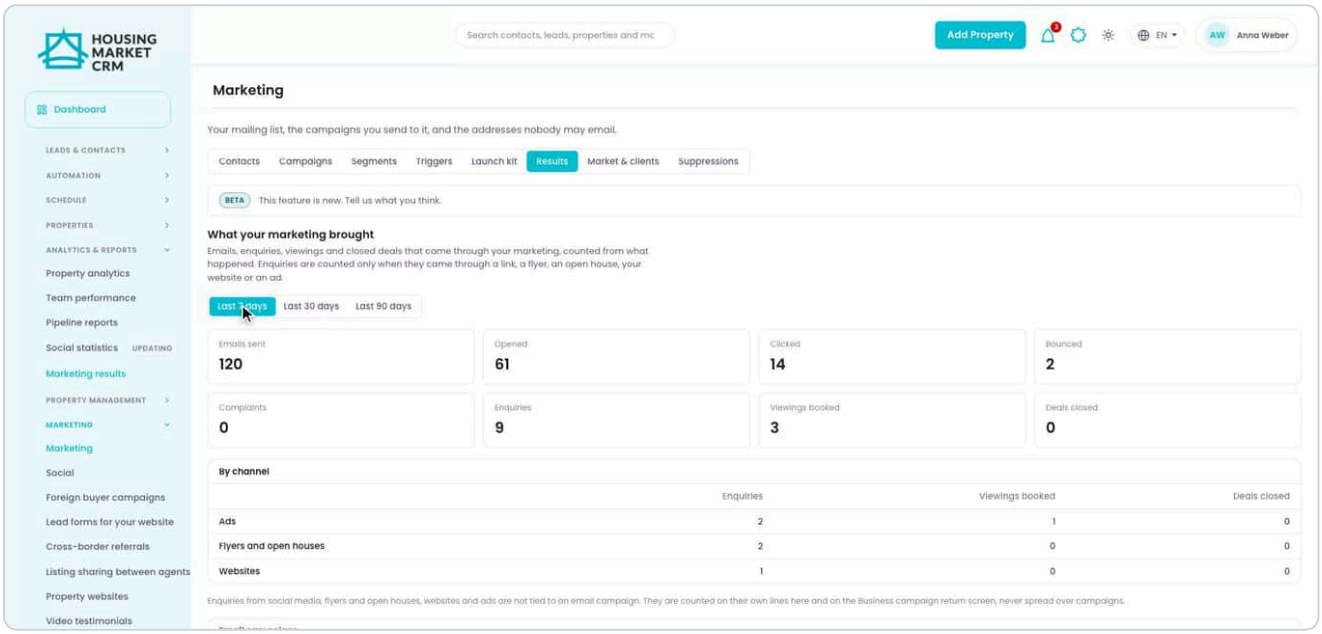


Figure 139.16 · Screen recorded 29 October 2026

17 Or Last 90 days.

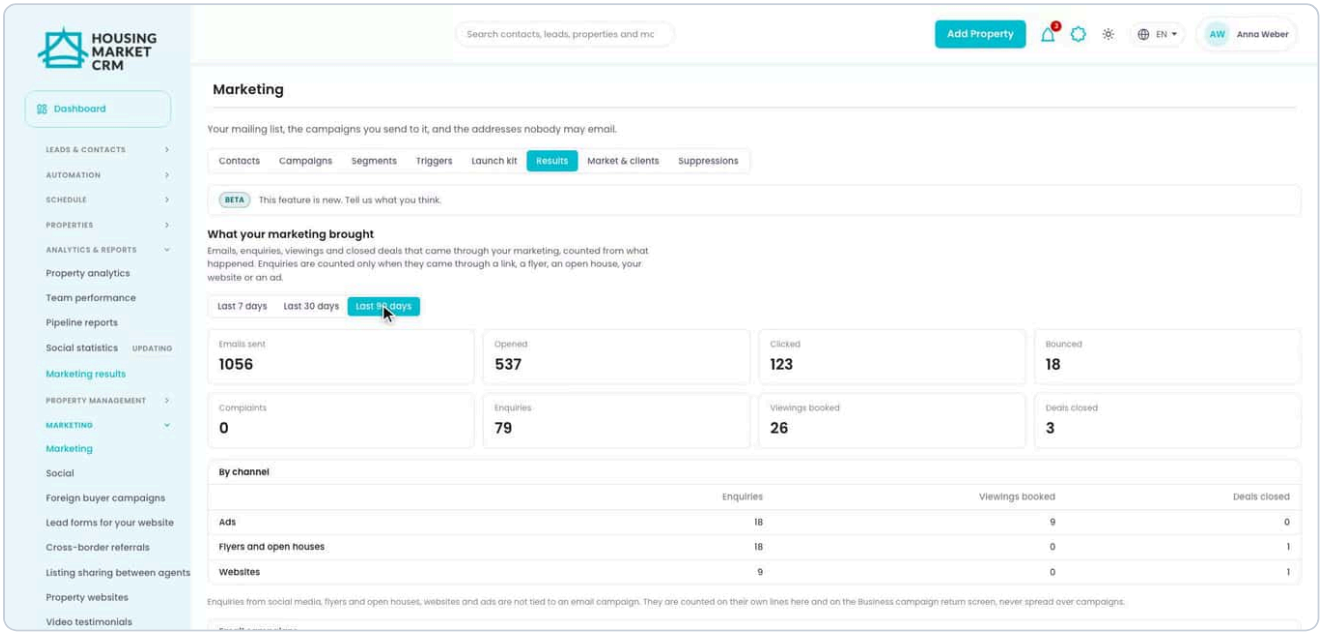


Figure 139.17 · Screen recorded 29 October 2026

18 The Results tab is part of the Pro plan.

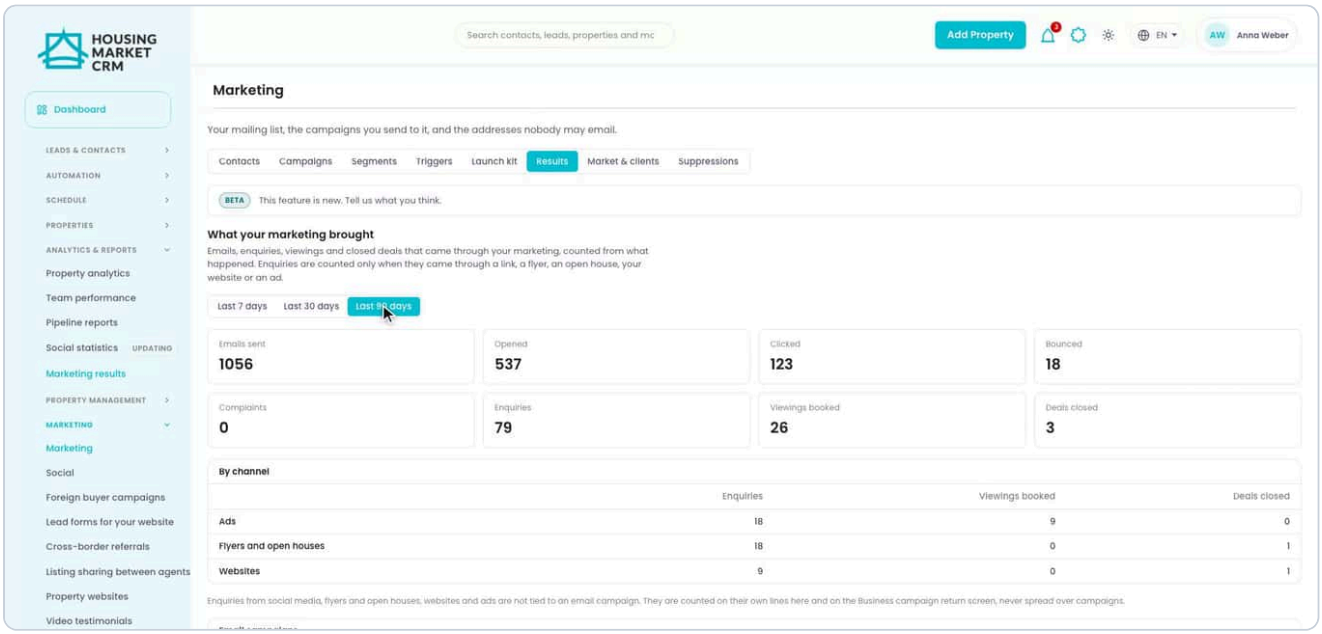


Figure 139.18 · Screen recorded 29 October 2026

140 CHAPTER 140

Build a lead form

Pro and Business | For agents | Watch the video

OVERVIEW

A lead form is a contact form you place on your own website. Every enquiry arrives in your CRM as a lead, together with where it came from. Lead forms are part of the Pro plan.

Under Marketing, choose Lead forms. Give the form a name that only you see, for example Homepage or Newsletter, and choose whether it asks for a phone number (do not ask, ask but optional, or required) and for a message. A heading is optional: leave it empty and the form uses a heading in the visitor's own language.

A new form is Not open yet. Choose Open the form to let it take enquiries and Pause the form to stop it, and you can change either whenever you like. Each form has a link and an embed code to paste into your website. If you list the websites that may show the form, other websites cannot; leave the list empty and any website can. That is a rule the browser keeps, not a secret.

To see where a lead came from, add ?utm_source=newsletter, or any utm_ tag, to the end of the form's link. The embed code passes your page's campaign tags to the form by itself. Choose Where leads came from to see the source, medium, campaign and page of the leads of a recent period.

You can show an unticked box for receiving property emails from you. A visitor who does not tick it is not added to your marketing list. The notice on the form names you as the person responsible for what visitors send and says Housing Market Group provides the page. If you delete a form its link stops working for good, and the leads it made stay in your CRM.

From the Help Center: **How do lead forms for my website work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

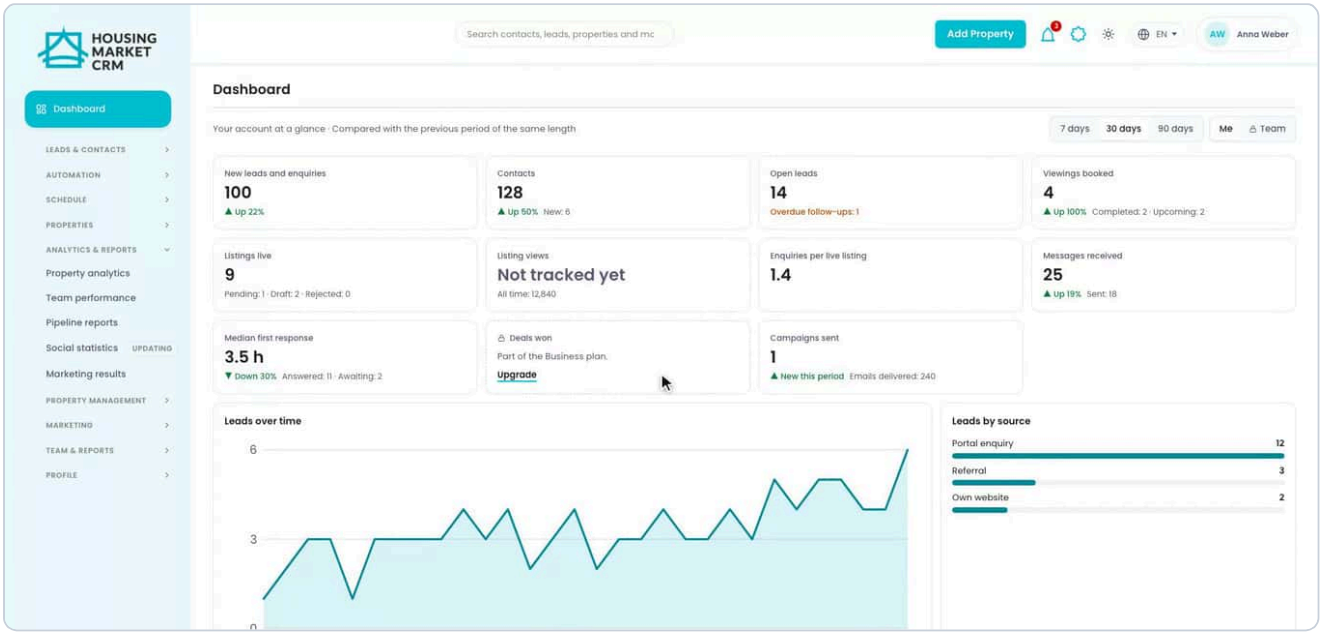


Figure 140.1 · Screen recorded 29 October 2026

2 Open the **Marketing** group in the left menu.

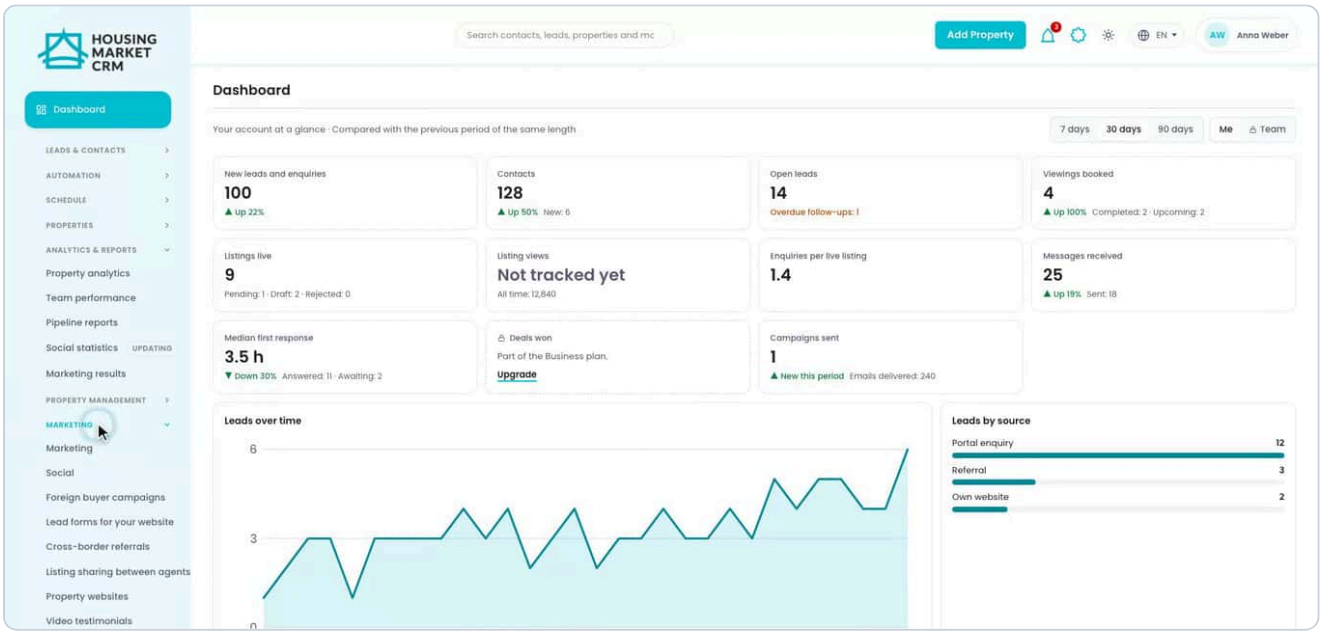


Figure 140.2 · Screen recorded 29 October 2026

3 Click **Lead forms for your website**.

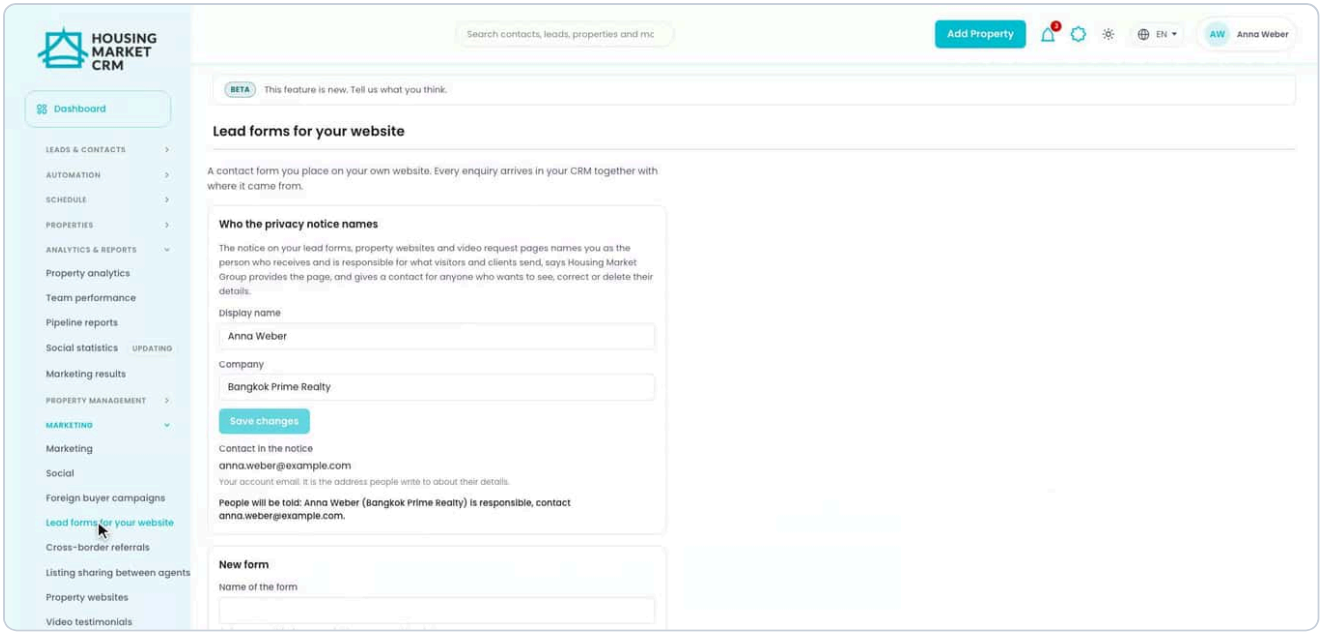


Figure 140.3 · Screen recorded 29 October 2026

4 This tool is new and shows a **Beta** badge while we refine it.

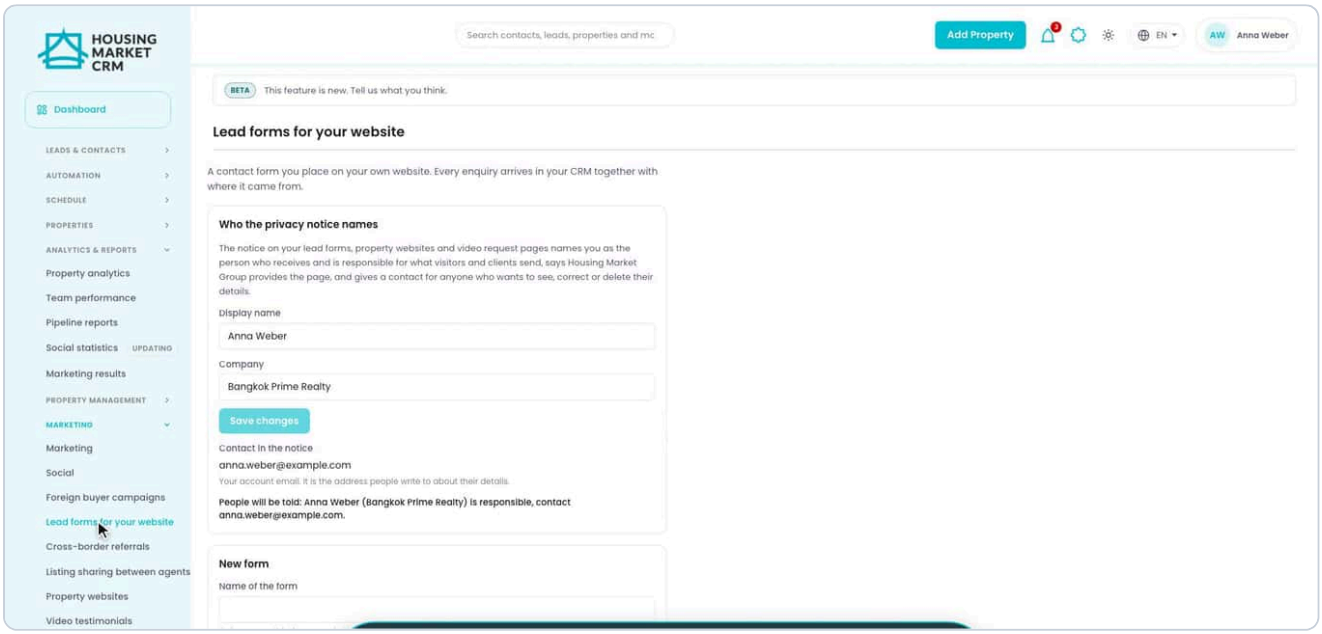


Figure 140.4 · Screen recorded 29 October 2026

5 The privacy notice names **you** and gives your contact, as shown here.

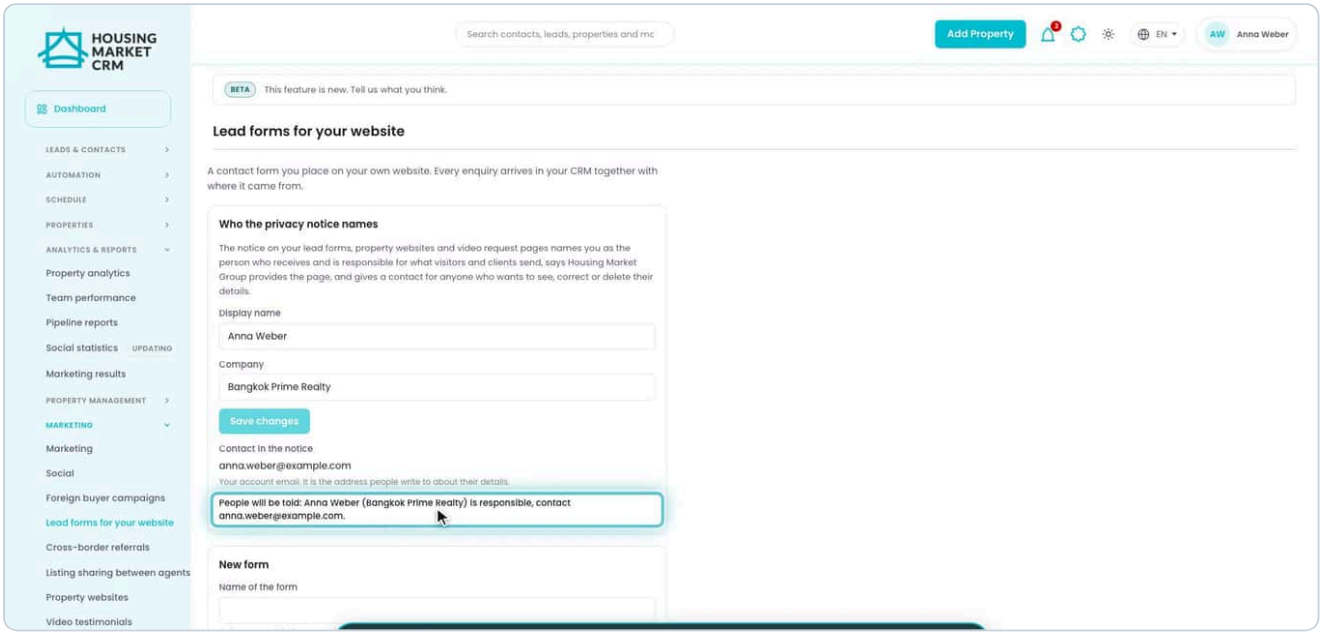


Figure 140.5 · Screen recorded 29 October 2026

6 Scroll down to **New form**.

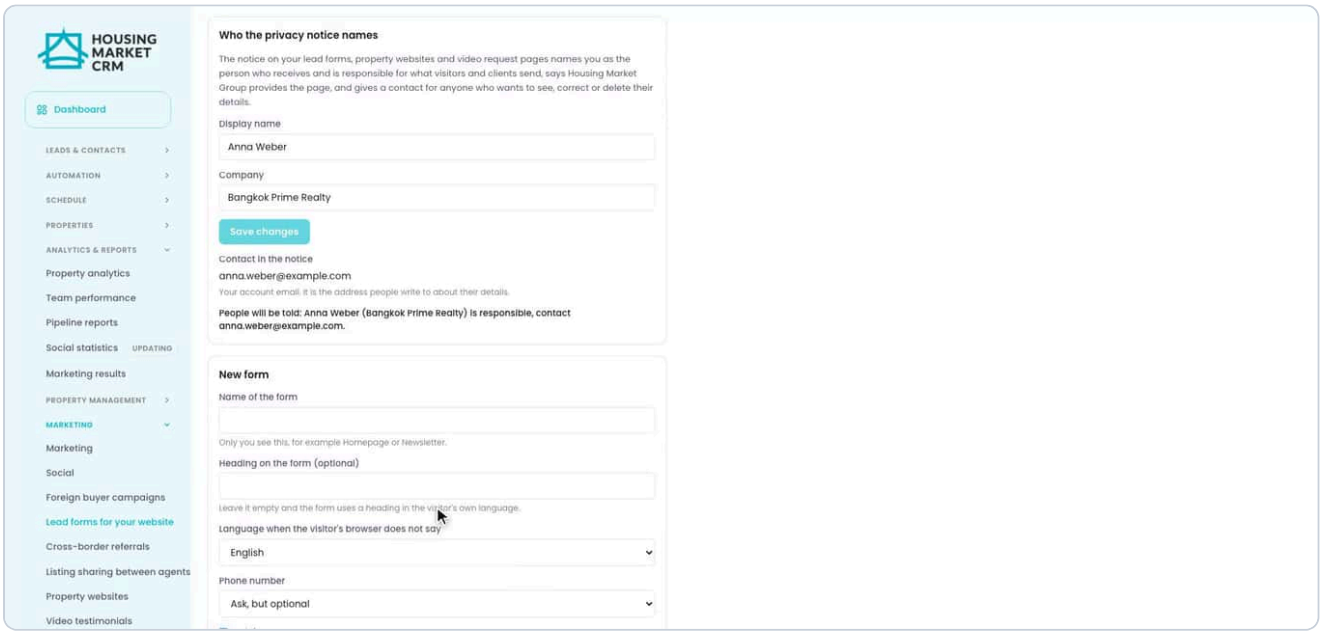


Figure 140.6 · Screen recorded 29 October 2026

7 Give the form a **name**. Only you see it.

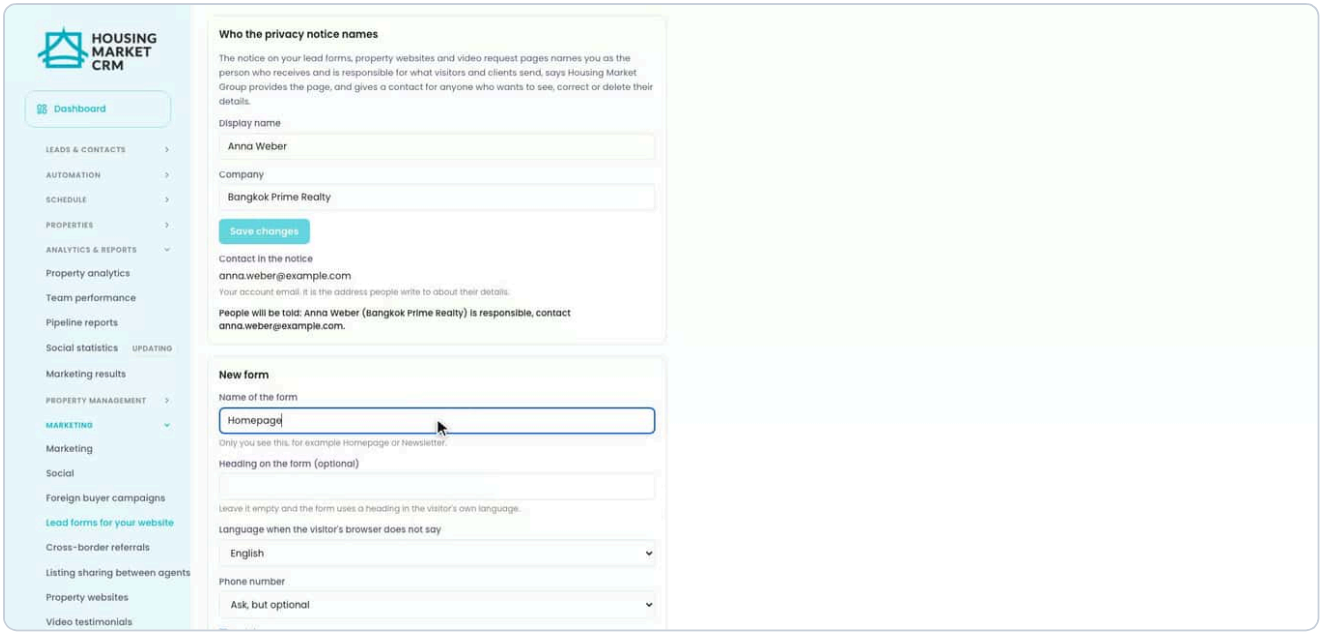


Figure 140.7 · Screen recorded 29 October 2026

8 Add a **heading** for the form, or leave it empty.

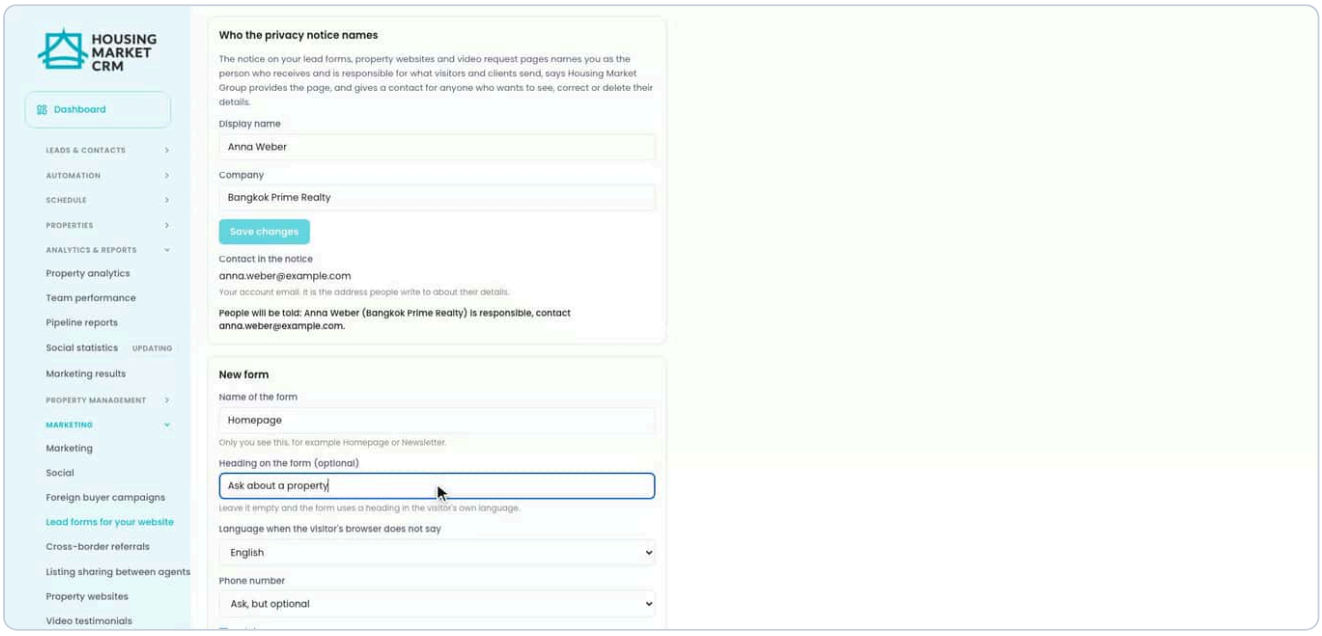


Figure 140.8 · Screen recorded 29 October 2026

9 Choose whether to ask for a **phone number**.

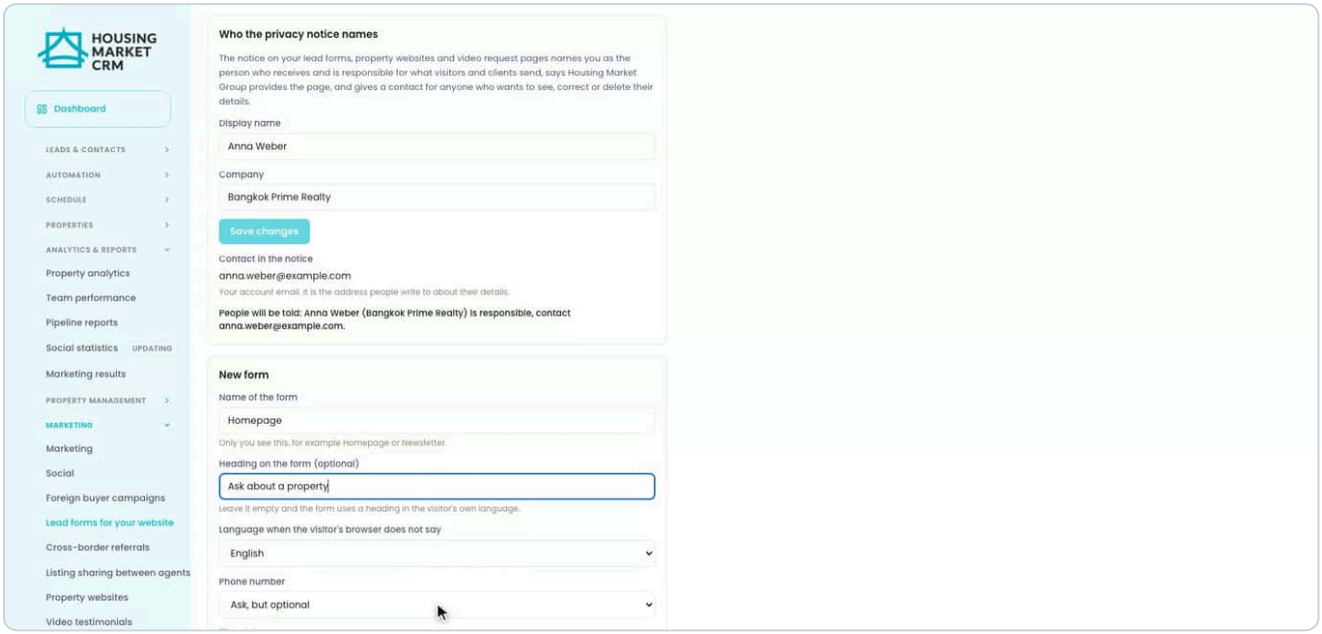


Figure 140.9 · Screen recorded 29 October 2026

10 Visitors see an **unticked** box to receive property emails from you.

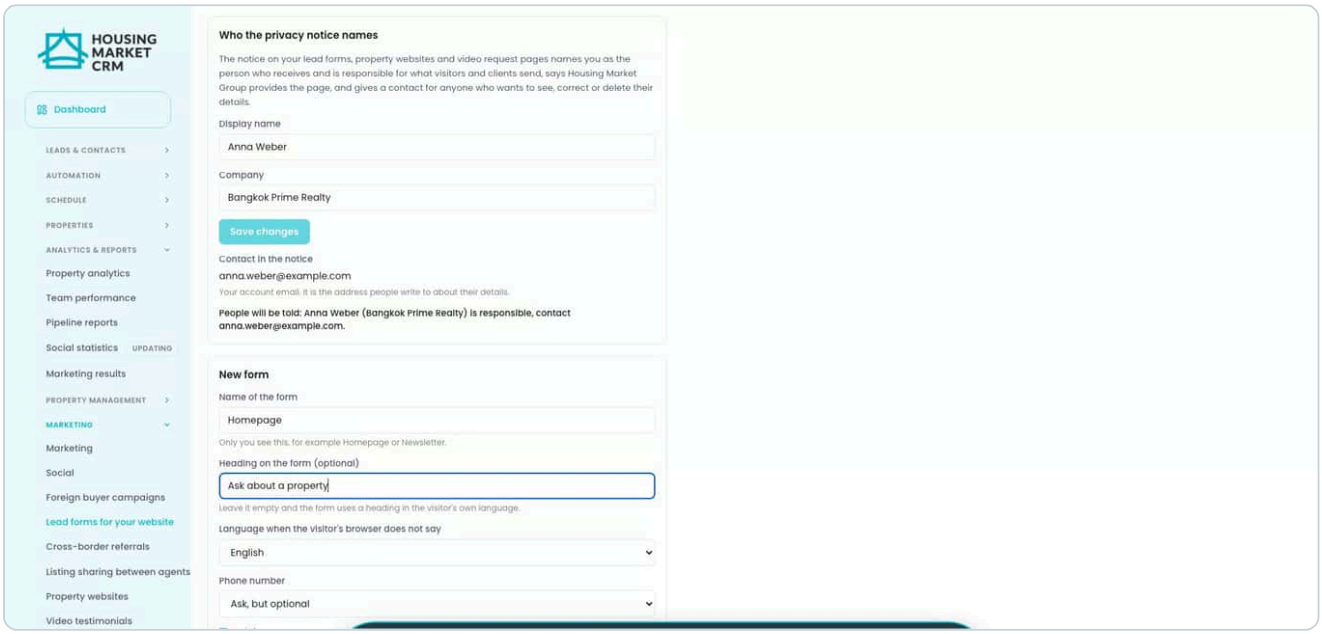


Figure 140.10 · Screen recorded 29 October 2026

11 List the **websites** that may show it, one per line.

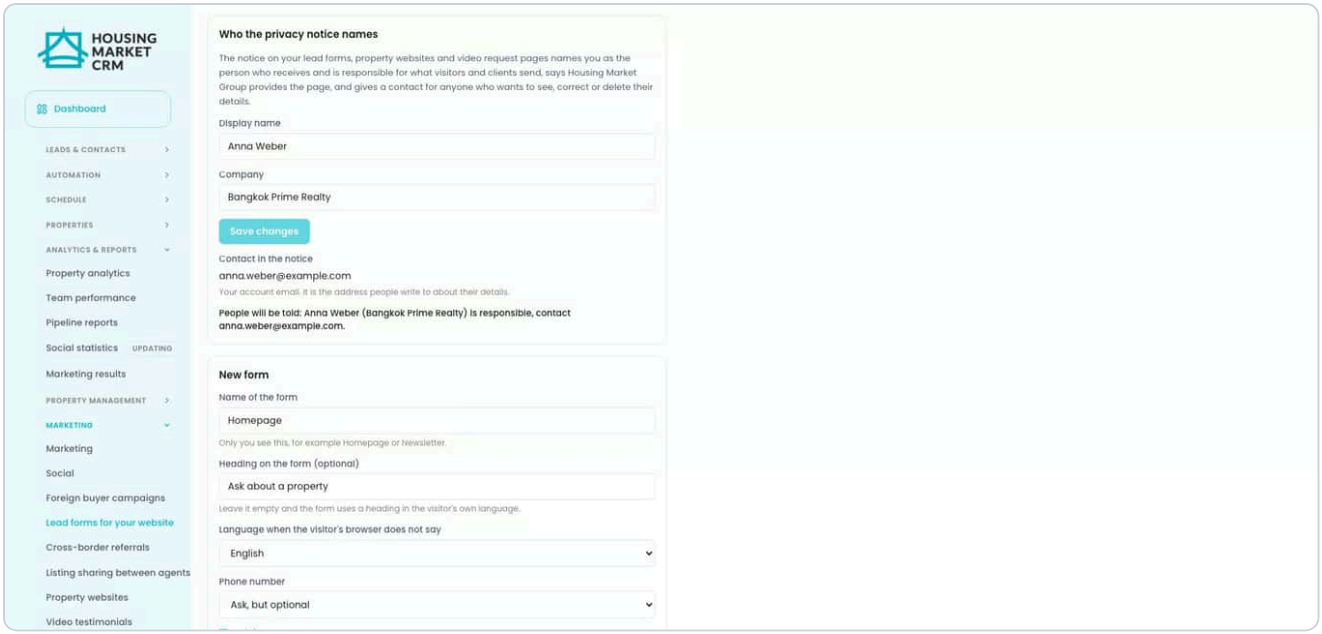


Figure 140.11 · Screen recorded 29 October 2026

12 Click **Create the form**.

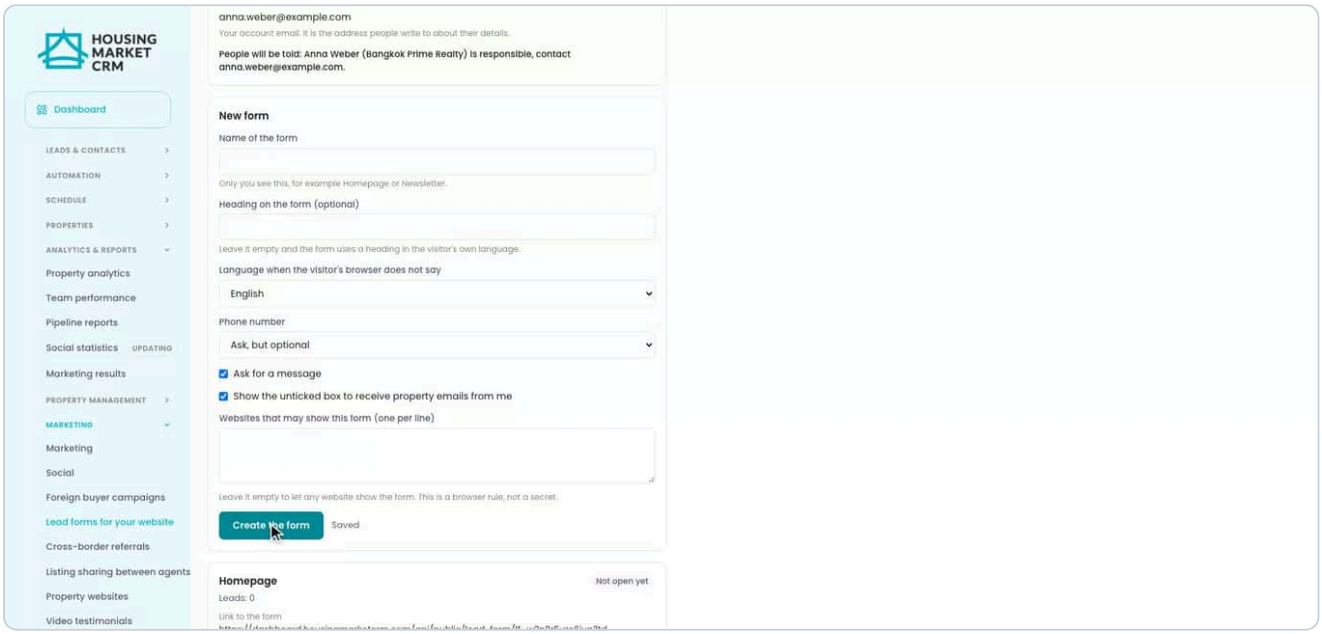


Figure 140.12 · Screen recorded 29 October 2026

13 The form is made, and it is **not open yet**.

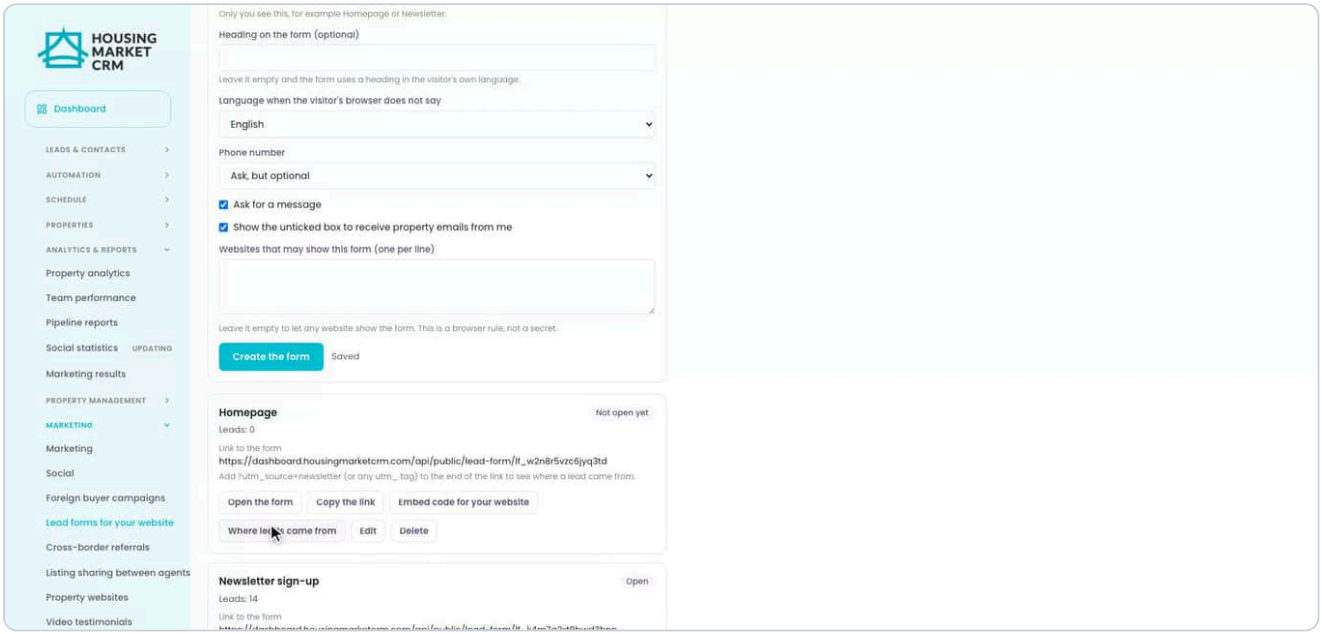


Figure 140.13 · Screen recorded 29 October 2026

14 Click **Open the form** to make its page public.

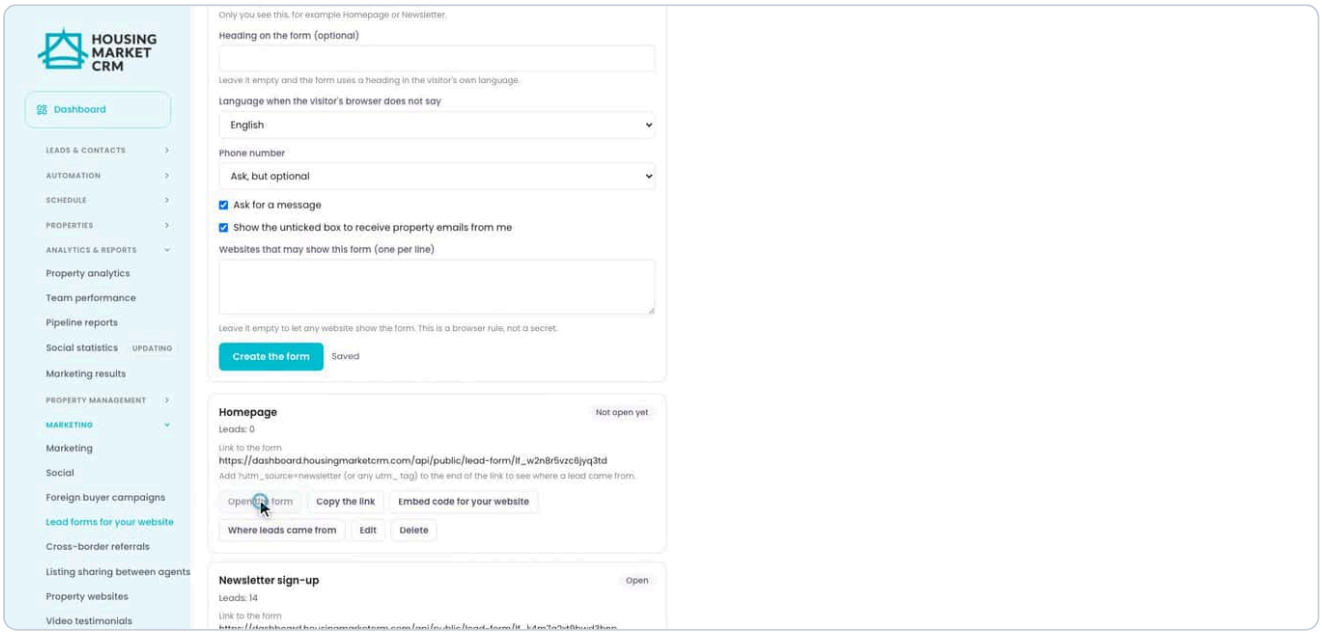


Figure 140.14 · Screen recorded 29 October 2026

15 Share the **link**, and add a utm_ tag to see where a lead came from.

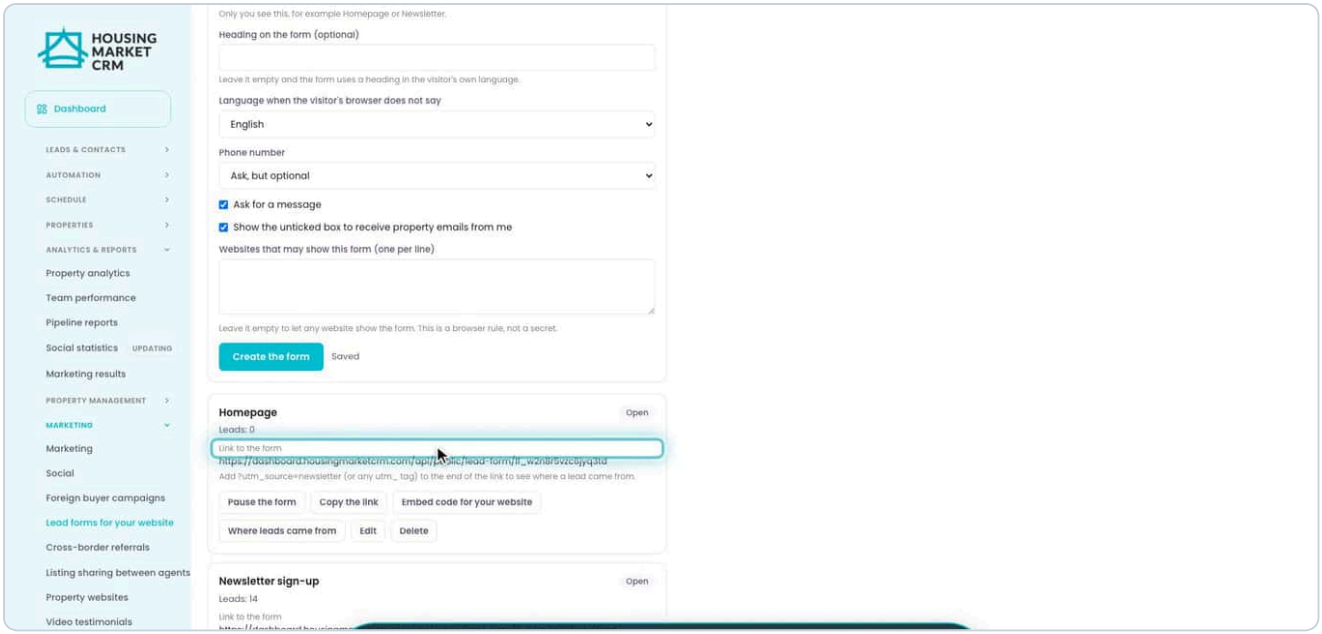


Figure 140.15 · Screen recorded 29 October 2026

16 Or paste the **embed code** on your own page.

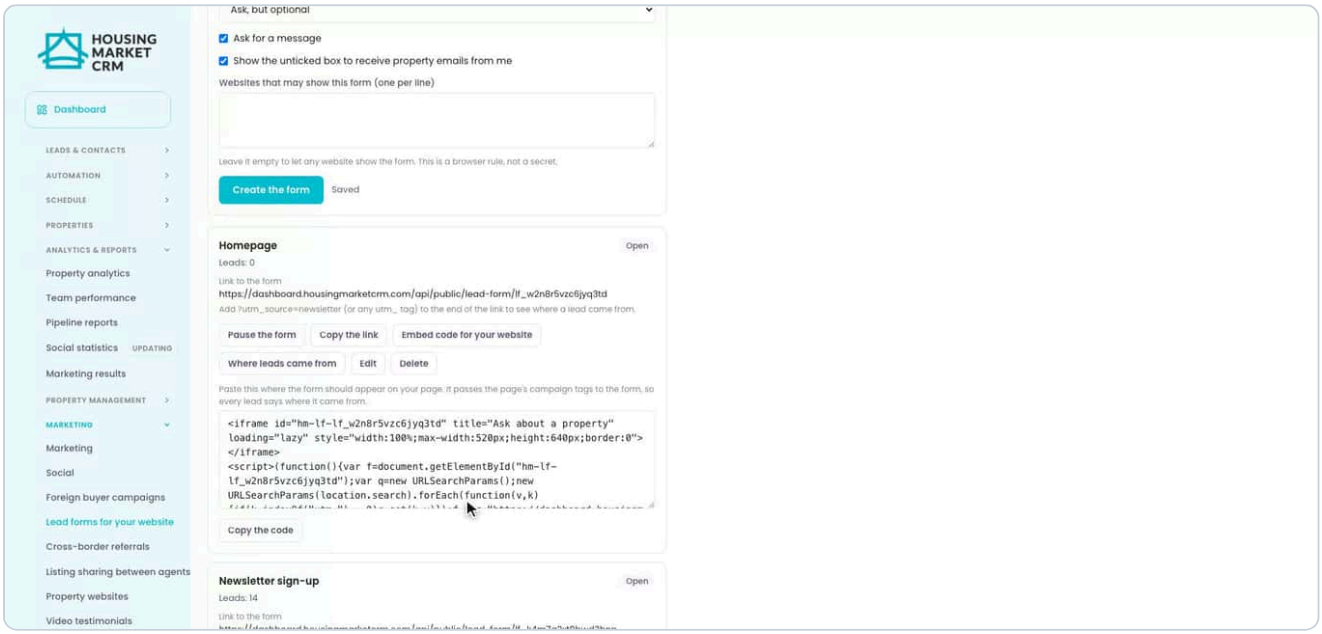


Figure 140.16 · Screen recorded 29 October 2026

17 Another form already has leads.

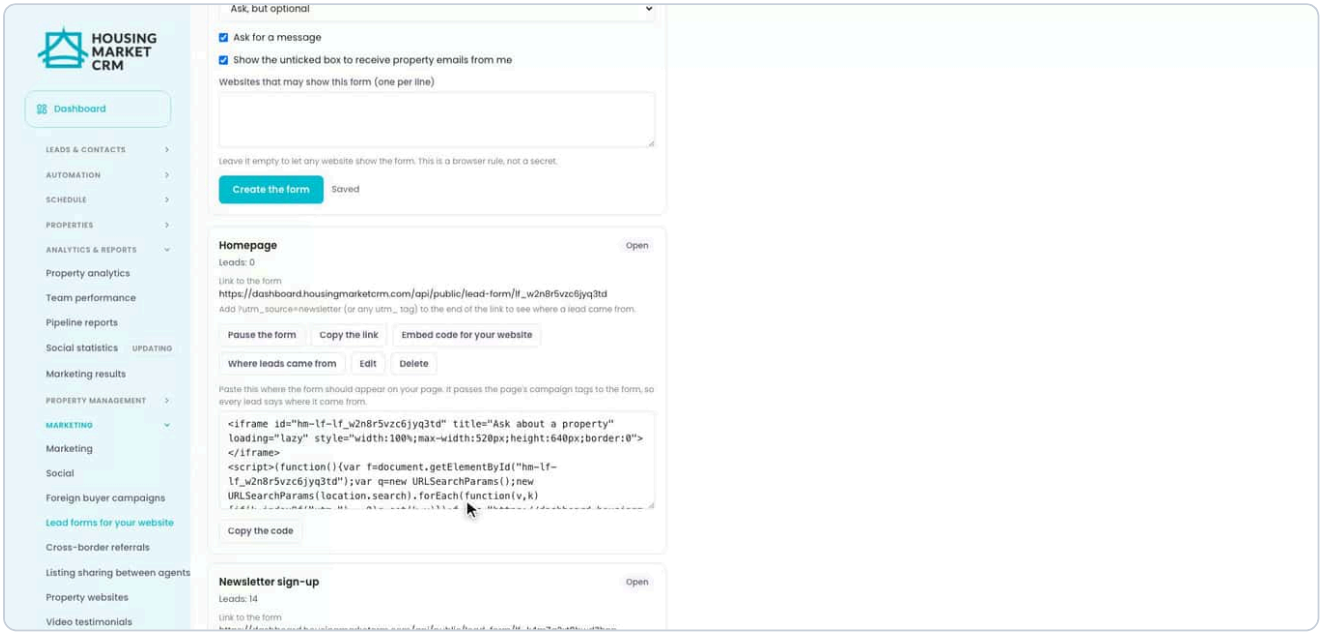


Figure 140.17 · Screen recorded 29 October 2026

18 Click **Where leads came from**.

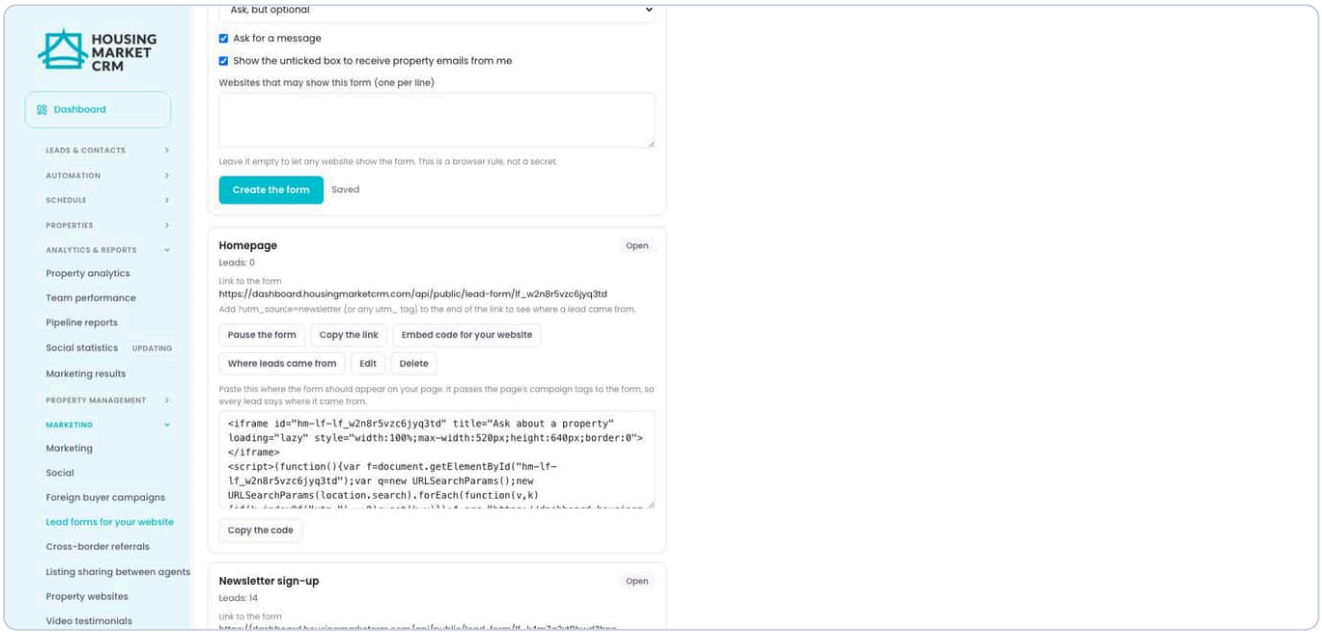


Figure 140.18 · Screen recorded 29 October 2026

19 See the **source**, **medium**, **campaign** and **page** of each lead.

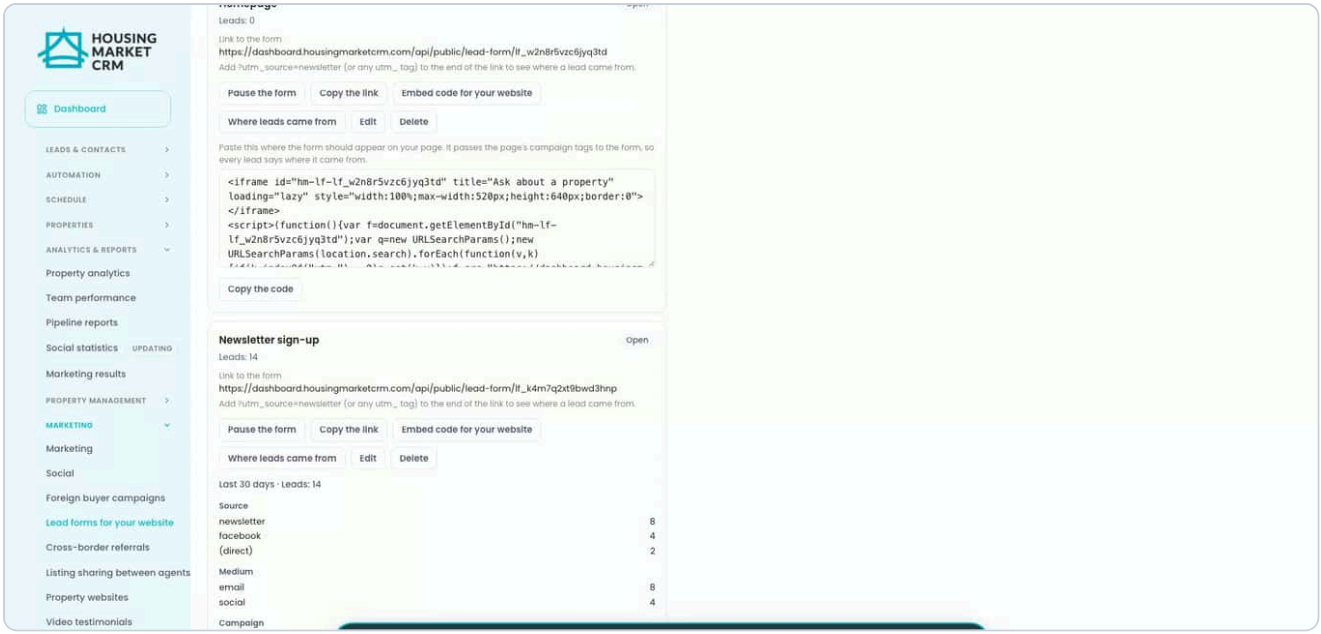


Figure 140.19 · Screen recorded 29 October 2026

141 CHAPTER 141

Publish a one-property website

Pro and Business | For agents | Watch the video

OVERVIEW

A property website is a web page of its own for one listing, with its own link and an enquiry form that sends each enquiry straight to your CRM. It is part of the Pro plan.

Open one of your properties and choose Property website, then Make the website. You can add a headline, which replaces the property title at the top, and a few lines of welcome text. Visitors see the page in the language of their own browser; you choose the language only for visitors whose browser does not say.

Your phone number and your email address are shown on the page only if you tick them. The page shows the property as it appears on your website: the street address stays hidden unless you chose to show the exact location.

A new page is Not published. Choose Publish and anyone with the link can open it; choose Unpublish and the link answers "page not found". Copy the link to share it, print it or put it in an advert. Each enquiry from the page arrives in your CRM as a lead, and the page shows how many came from it.

The page needs the property to be shown on your website or published on a portal. If it is not, the page tells visitors that the property is no longer available, so show it or publish it first. Under Marketing, choose Property websites to see every page you have made.

From the Help Center: **What is a property website in the CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

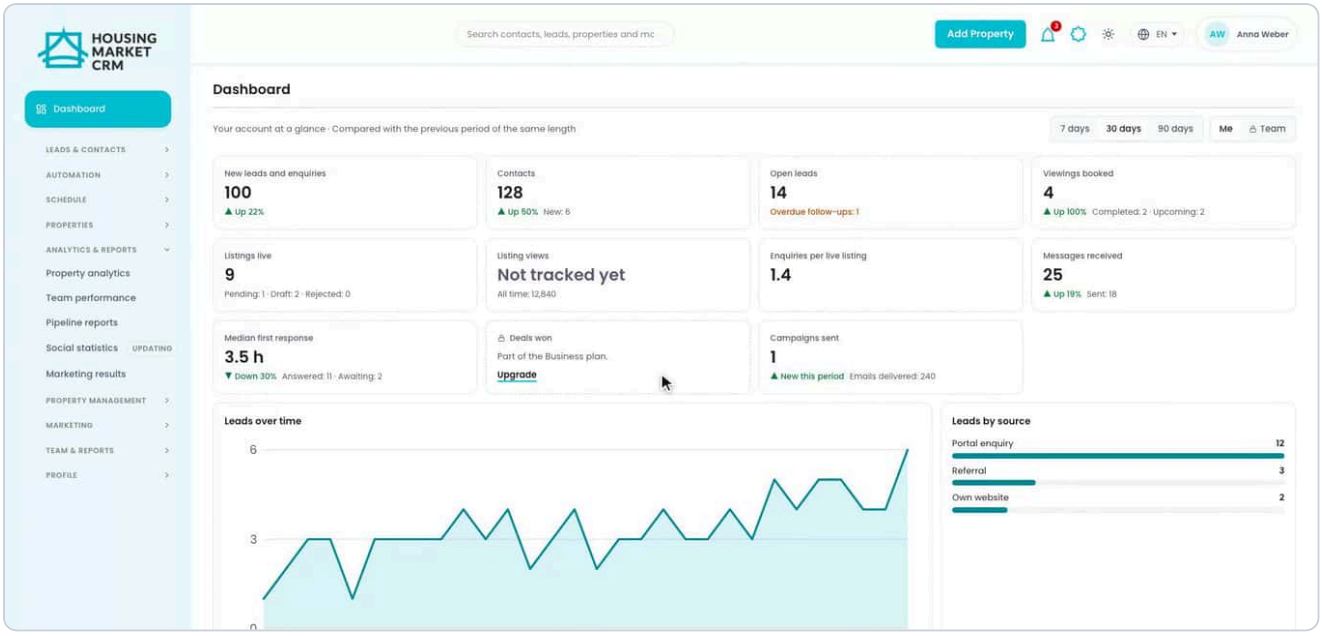


Figure 141.1 · Screen recorded 29 October 2026

2 Open **Properties** in the left menu.

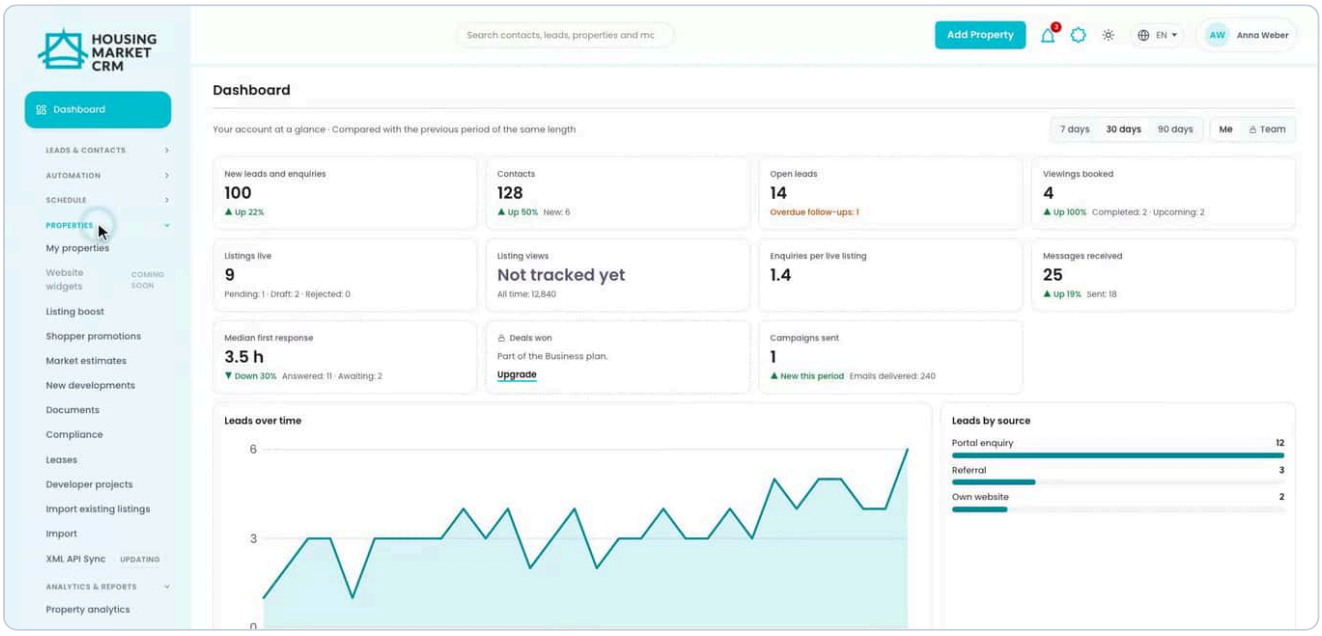


Figure 141.2 · Screen recorded 29 October 2026

3 Click **My properties**.

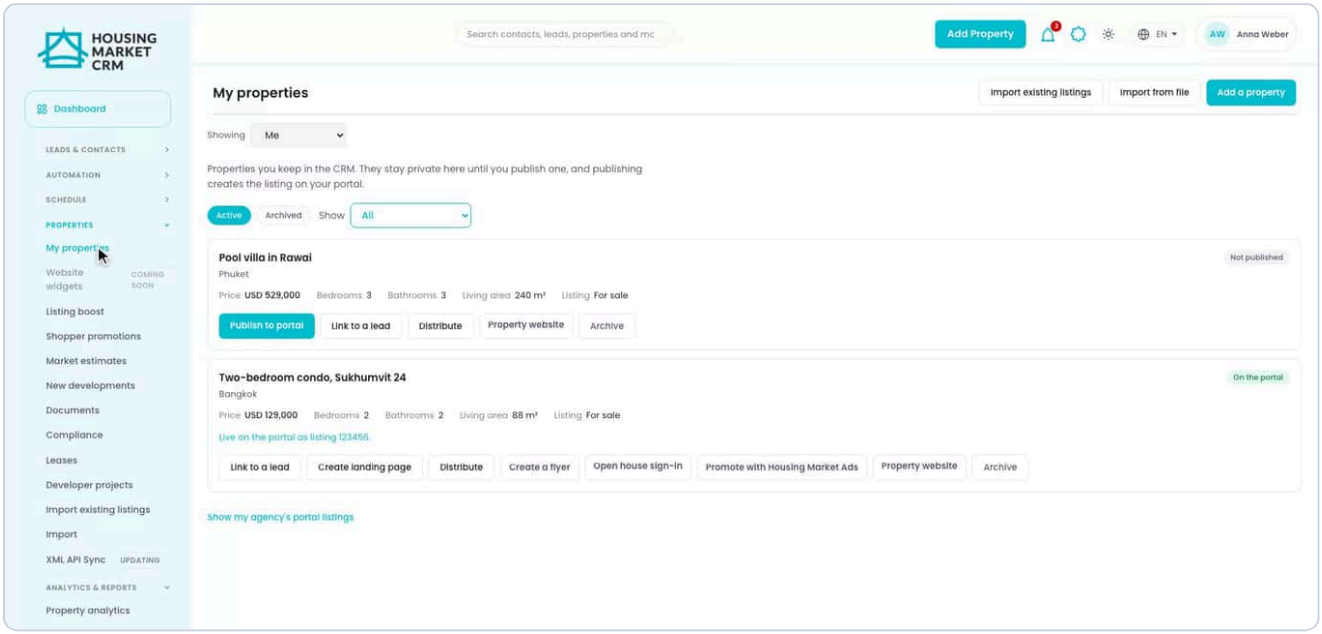


Figure 141.3 · Screen recorded 29 October 2026

4 Every property you keep in the CRM has a **Property website** button.

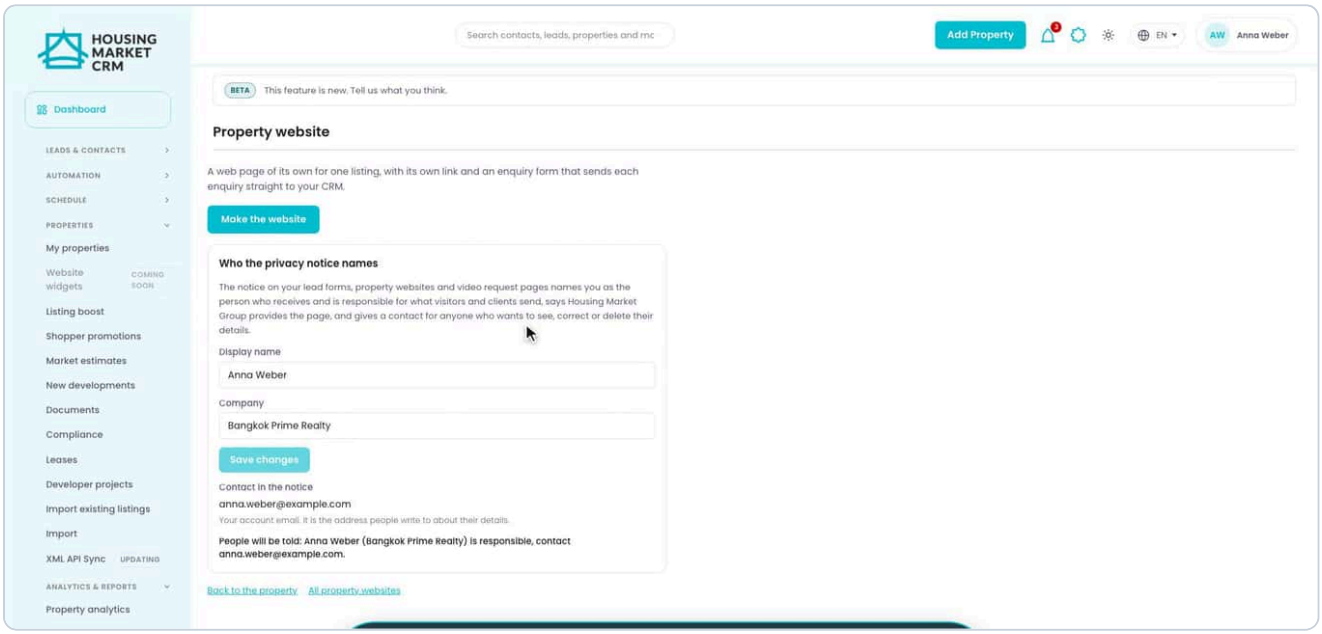


Figure 141.4 · Screen recorded 29 October 2026

5 This tool is new and shows a **Beta** badge while we refine it.

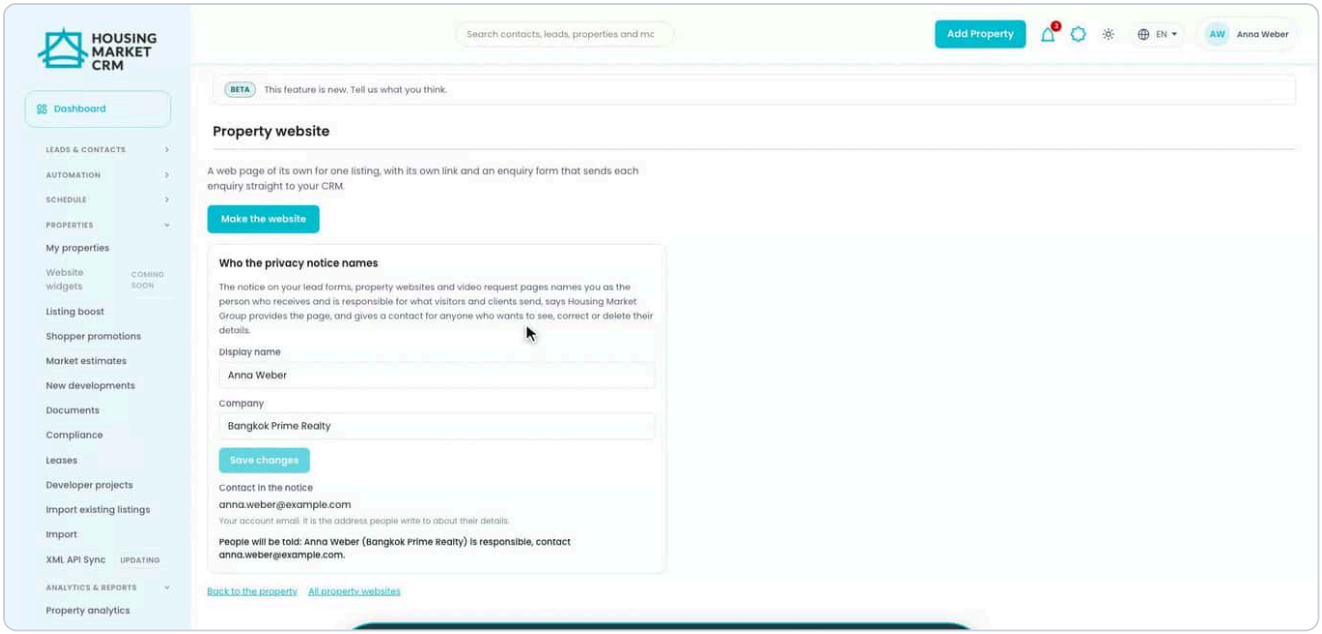


Figure 141.5 · Screen recorded 29 October 2026

6 The privacy notice names **you**, as shown here.

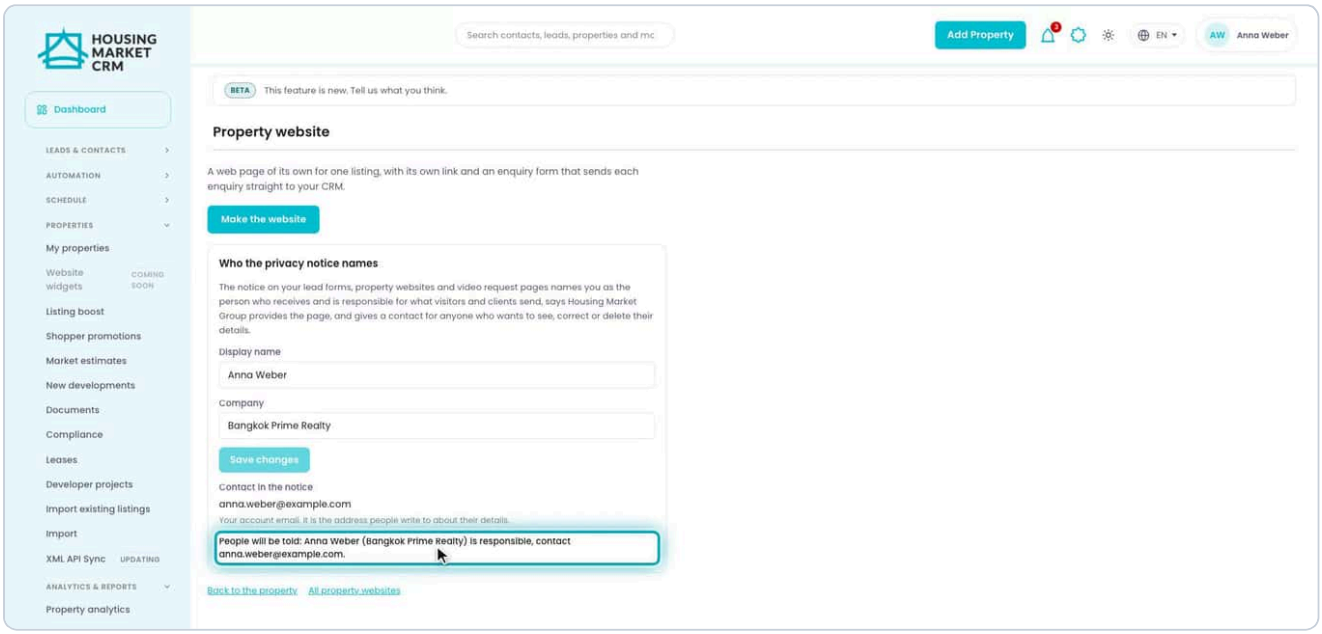


Figure 141.6 · Screen recorded 29 October 2026

7 Click **Make the website.**

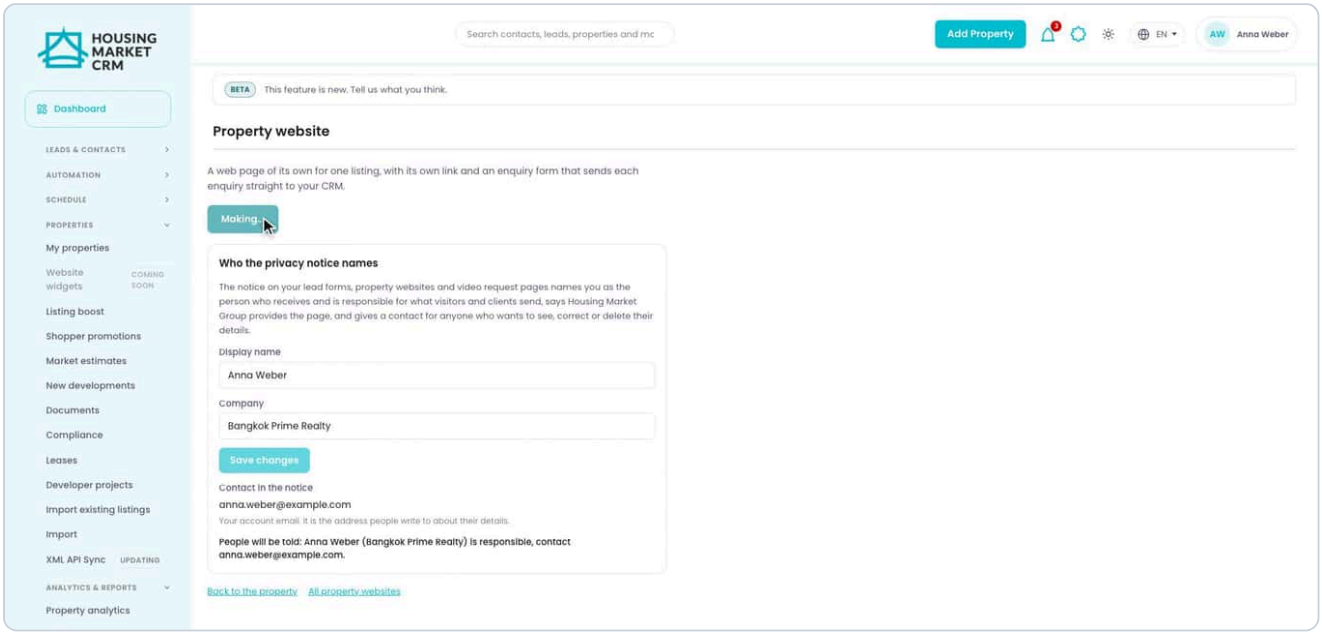


Figure 141.7 · Screen recorded 29 October 2026

8 Write a **headline**, or keep the property title.

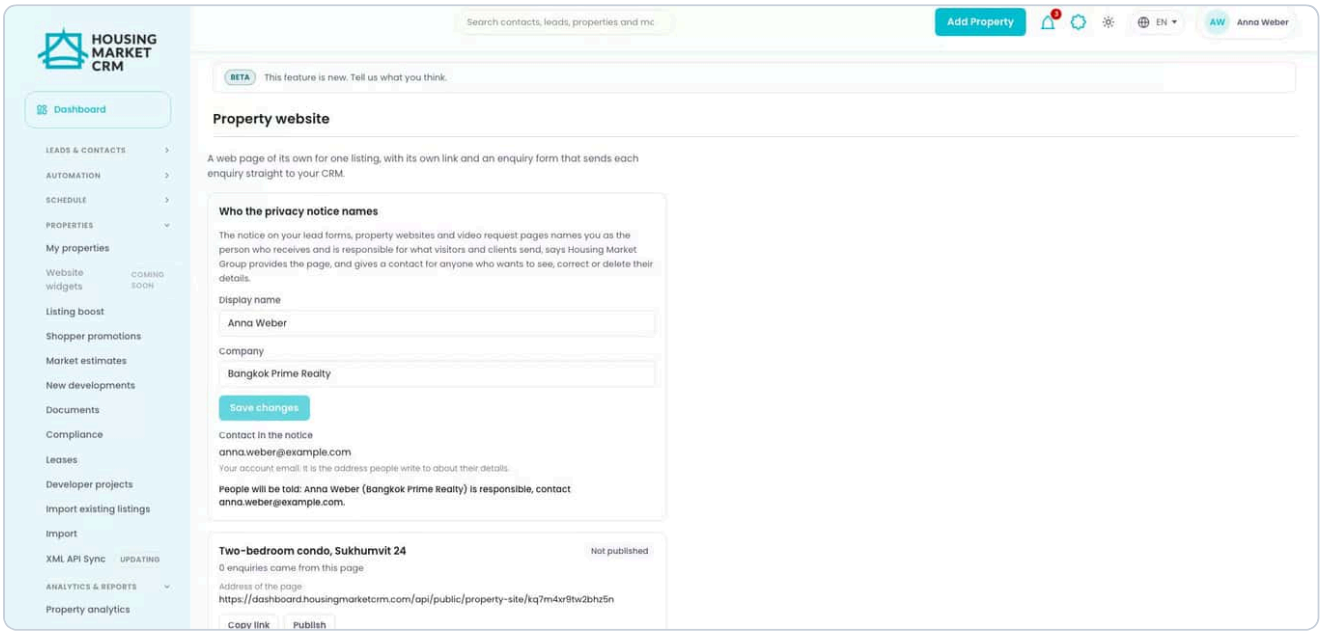


Figure 141.8 · Screen recorded 29 October 2026

9 Add a short **welcome text**.

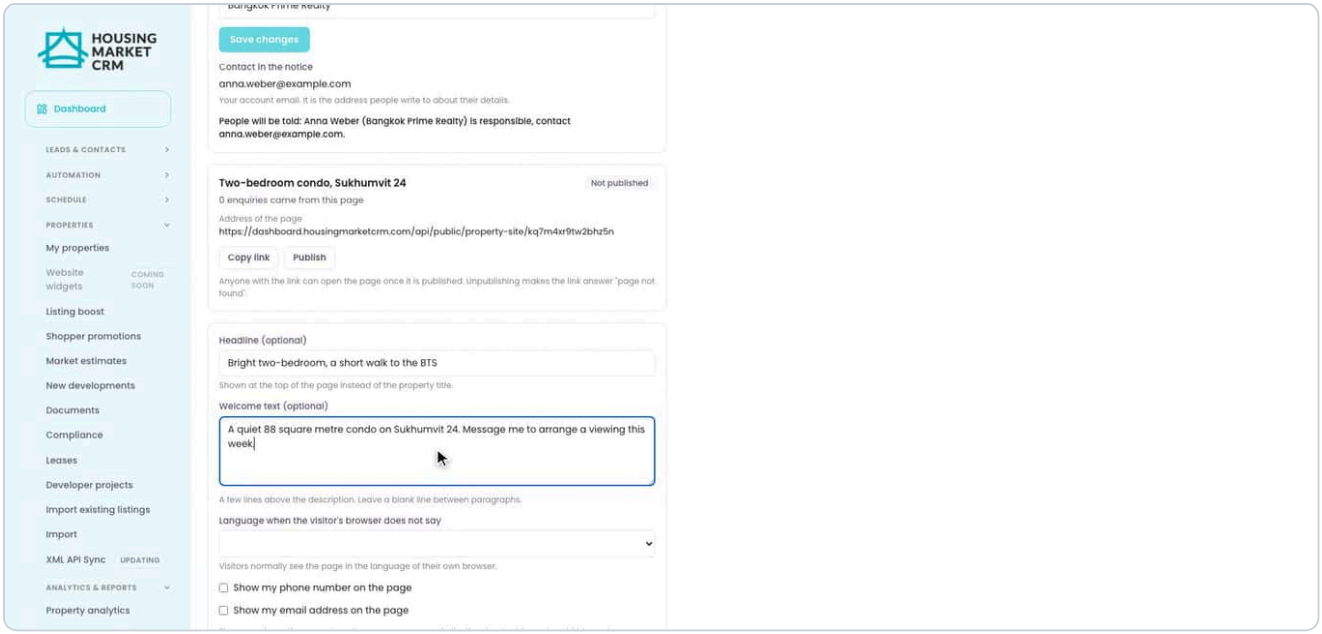


Figure 141.9 · Screen recorded 29 October 2026

10 Choose whether your **phone number** and **email address** show.

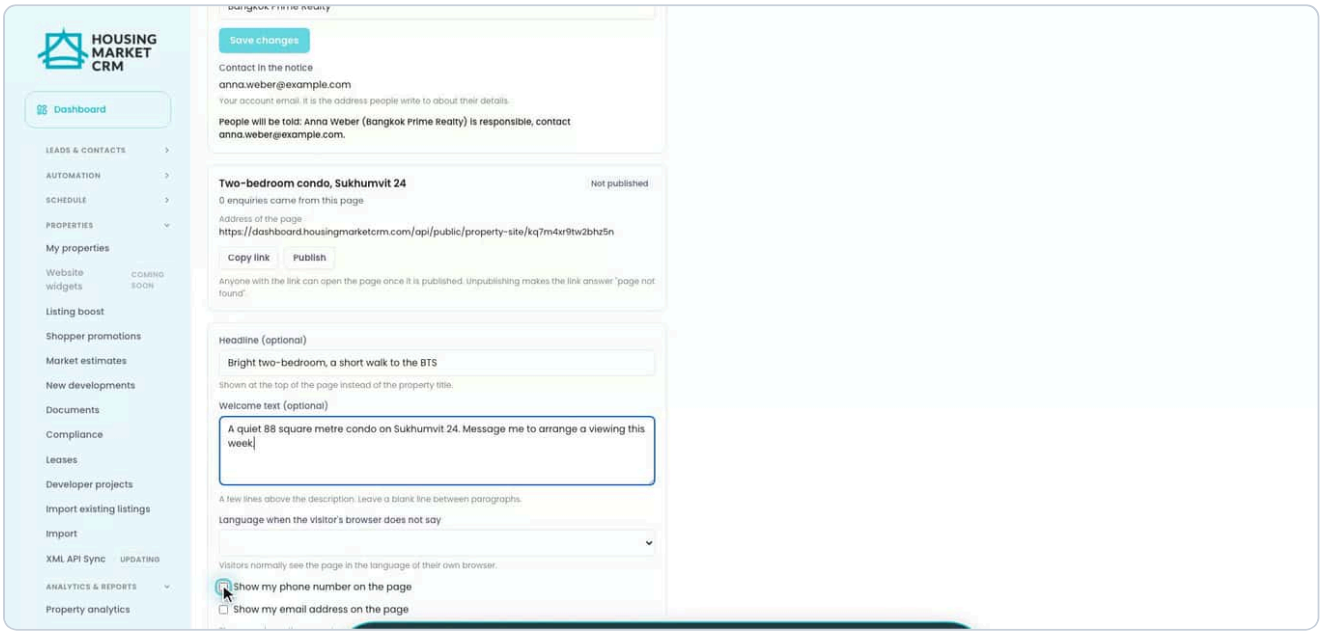


Figure 141.10 · Screen recorded 29 October 2026

11 The street address stays hidden unless you chose to show it.

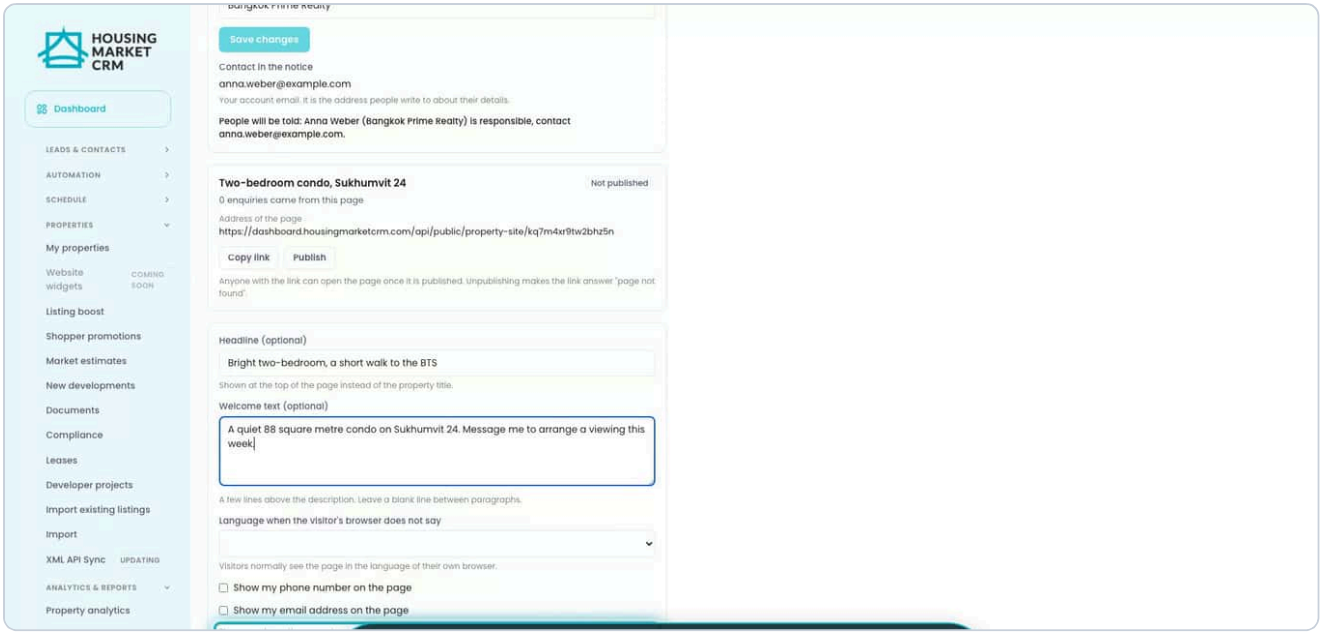


Figure 141.11 · Screen recorded 29 October 2026

12 Click **Save**.

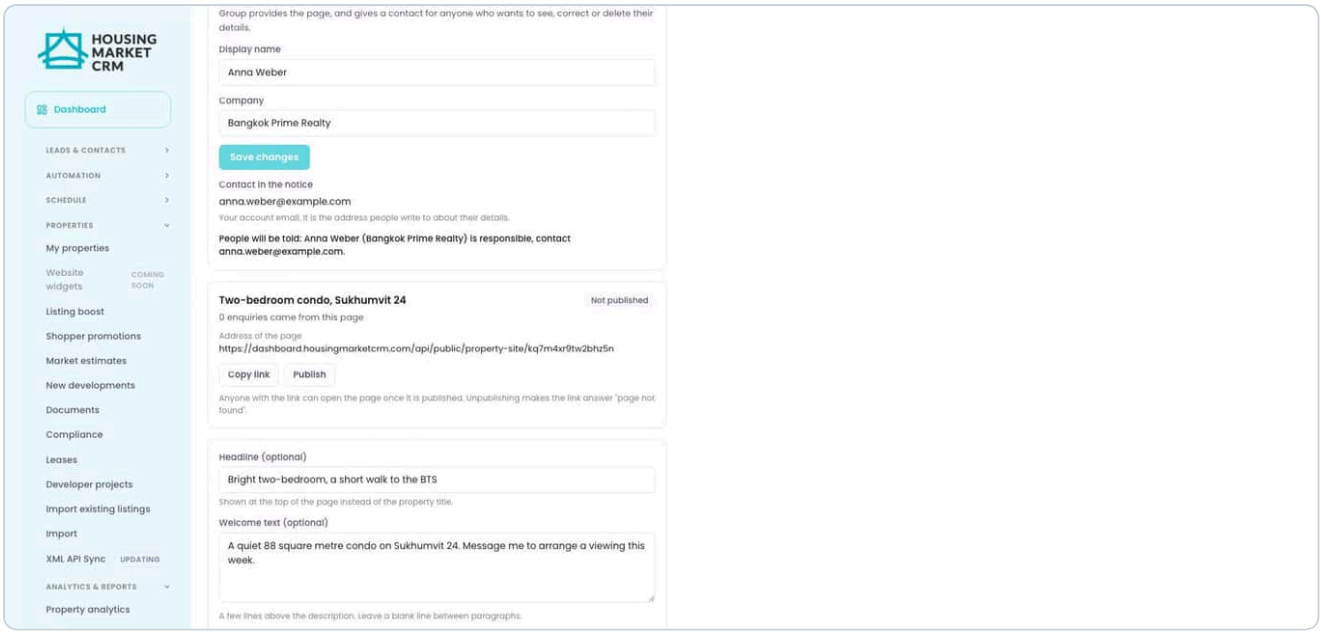


Figure 141.12 · Screen recorded 29 October 2026

13 Click **Publish** to open the page to anyone with the link.

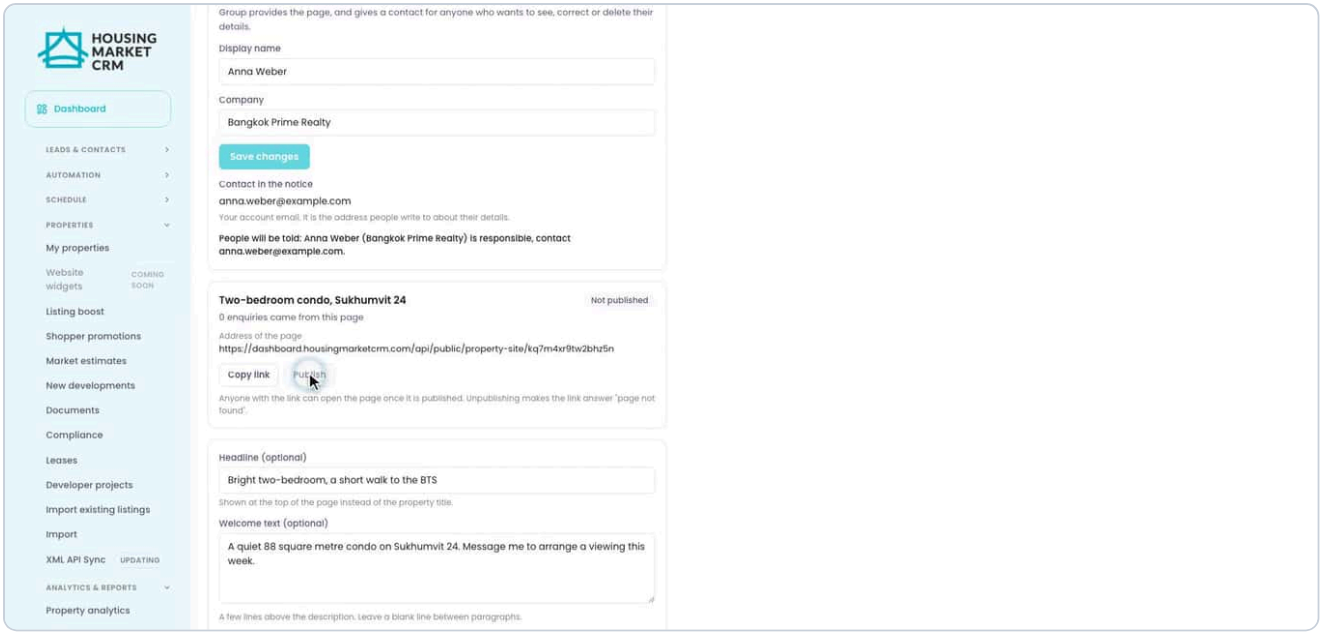


Figure 141.13 · Screen recorded 29 October 2026

14 The page has its own **address**. Copy it and share it.

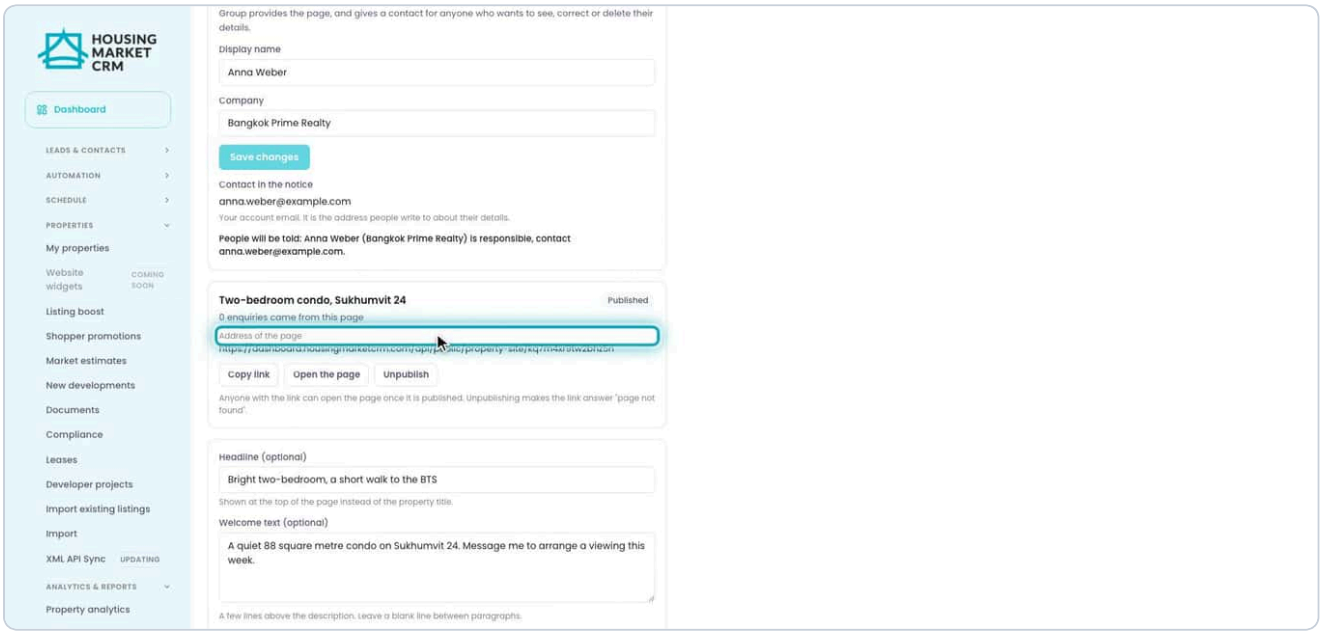


Figure 141.14 · Screen recorded 29 October 2026

15 Unpublish at any time and the link answers **page not found**.

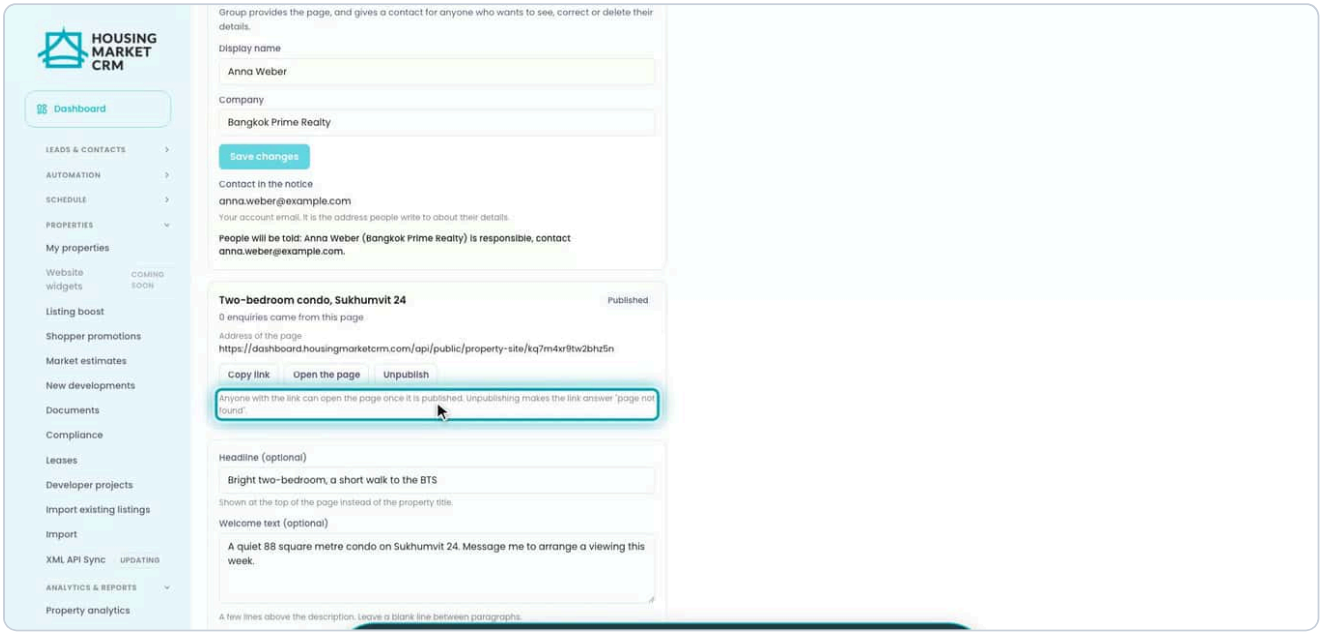


Figure 141.15 · Screen recorded 29 October 2026

16 Open **All property websites**.

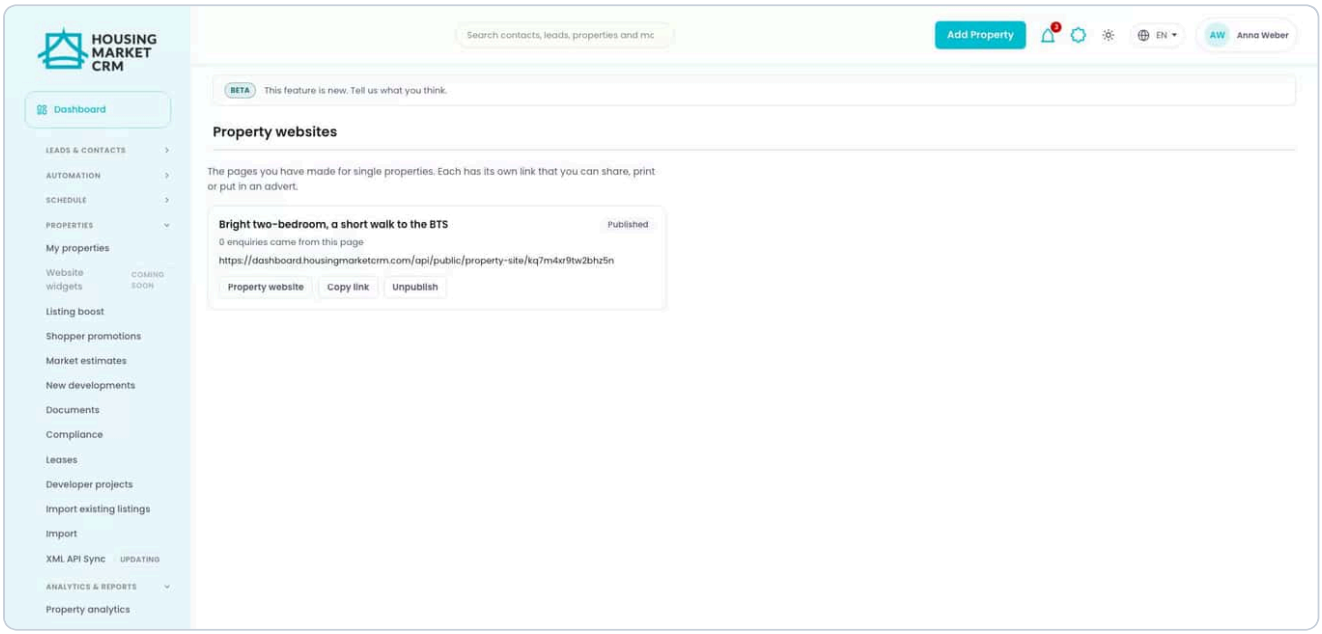


Figure 141.16 · Screen recorded 29 October 2026

17 Each page shows how many **enquiries** it brought.

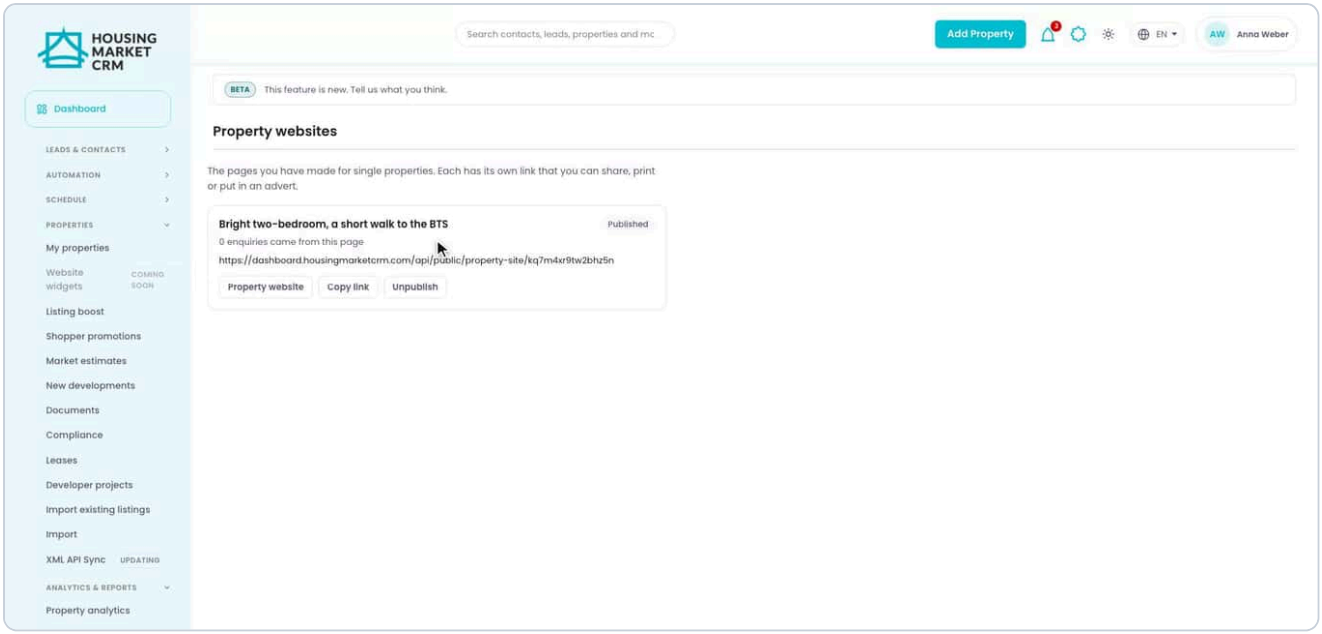


Figure 141.17 · Screen recorded 29 October 2026

142 CHAPTER 142

Collect a video testimonial

Pro and Business | For agents | Watch the video

OVERVIEW

Send a past client a link, they record a short video review, you watch it, and the ones you approve are shown on your public profile. Video testimonials are part of the Pro plan.

Under Marketing, choose Video testimonials, write who the request is for (only you see this) and choose Create the request link. Send the link to your client. The client uploads a short video from a phone or computer (MP4, MOV or WebM), chooses the name shown beside it, may add a line, and ticks that they agree and are 18 or older. The screen states the largest clip and how many days a link stays open, and an expired link is replaced by creating a new request.

Each request shows where it is: Waiting for the client, Ready for you to watch, Published on your profile, Taken off your profile, Not published, Taken back by the client or Removed. Choose Watch to see a video before anyone else does.

Nothing is shown until you approve it. Choose Publish on my profile to show a video, Do not publish to decline it, and Take off my profile to remove it later. The date the client agreed is recorded with the clip, and a clip without recorded consent cannot be published. A client can take a video back, and the video is then deleted. You can also delete a request together with its video.

From the Help Center: **How do video testimonials work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

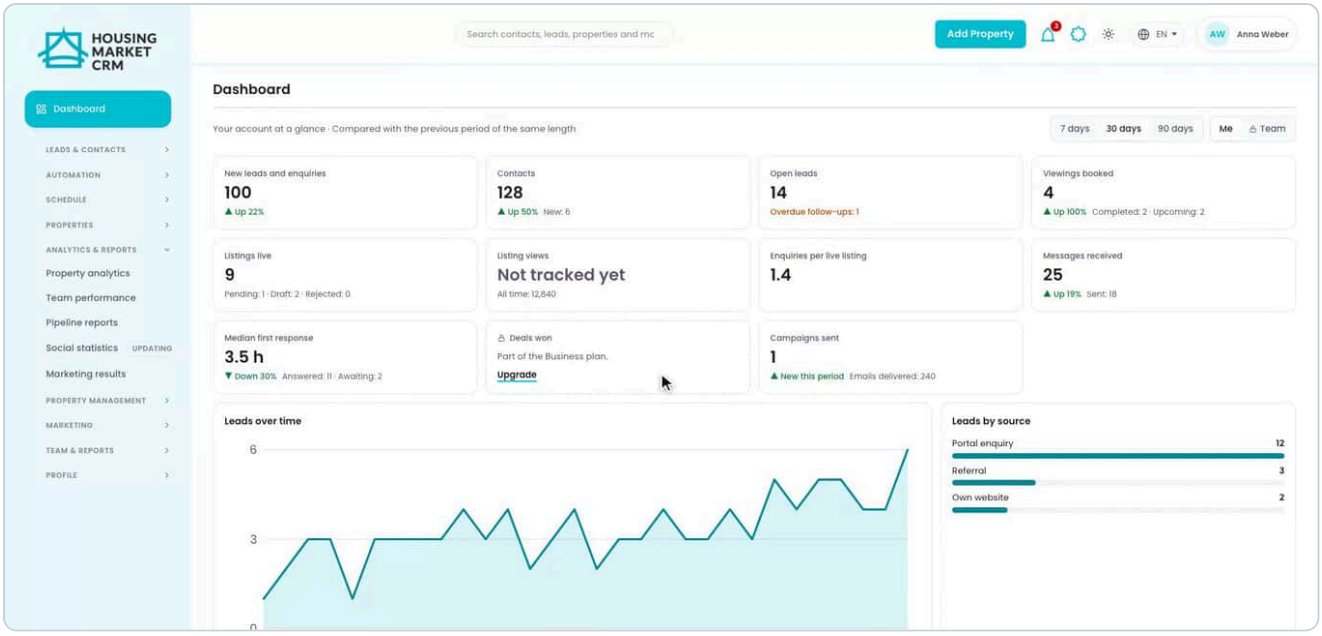


Figure 142.1 · Screen recorded 29 October 2026

2 Open the **Marketing** group in the left menu.

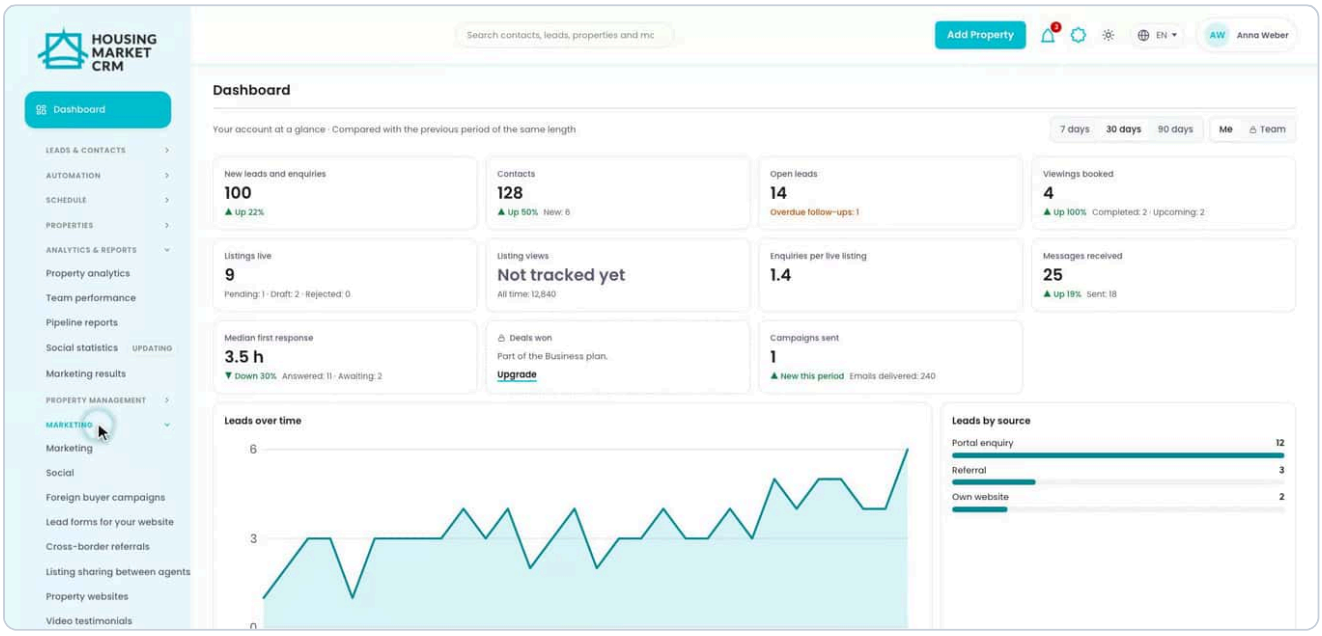


Figure 142.2 · Screen recorded 29 October 2026

3 Click **Video testimonials**.

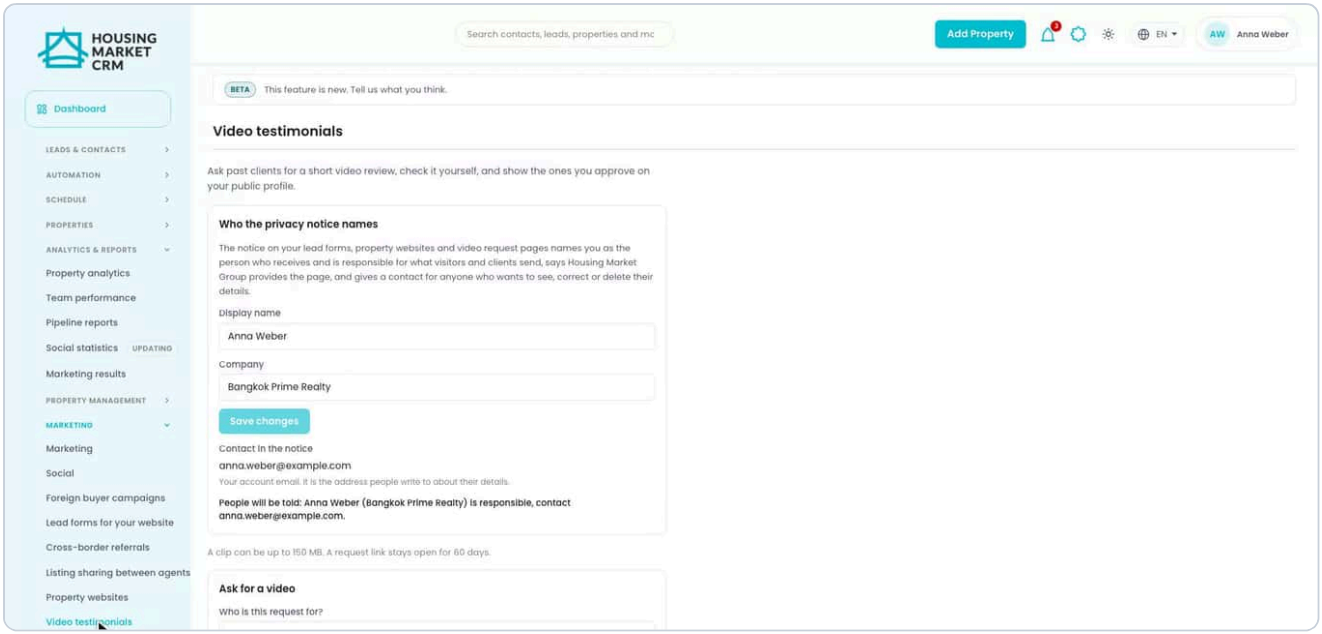


Figure 142.3 · Screen recorded 29 October 2026

4 This tool is new and shows a **Beta** badge while we refine it.

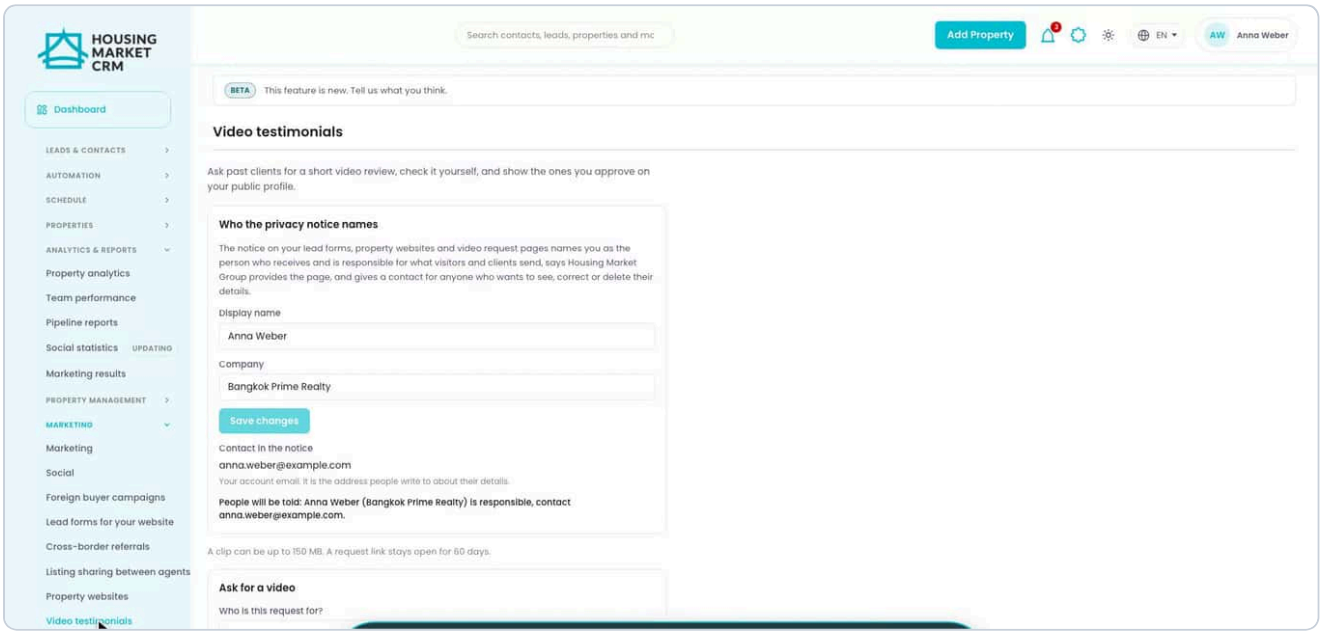


Figure 142.4 · Screen recorded 29 October 2026

5 The privacy notice names **you**, as shown here.

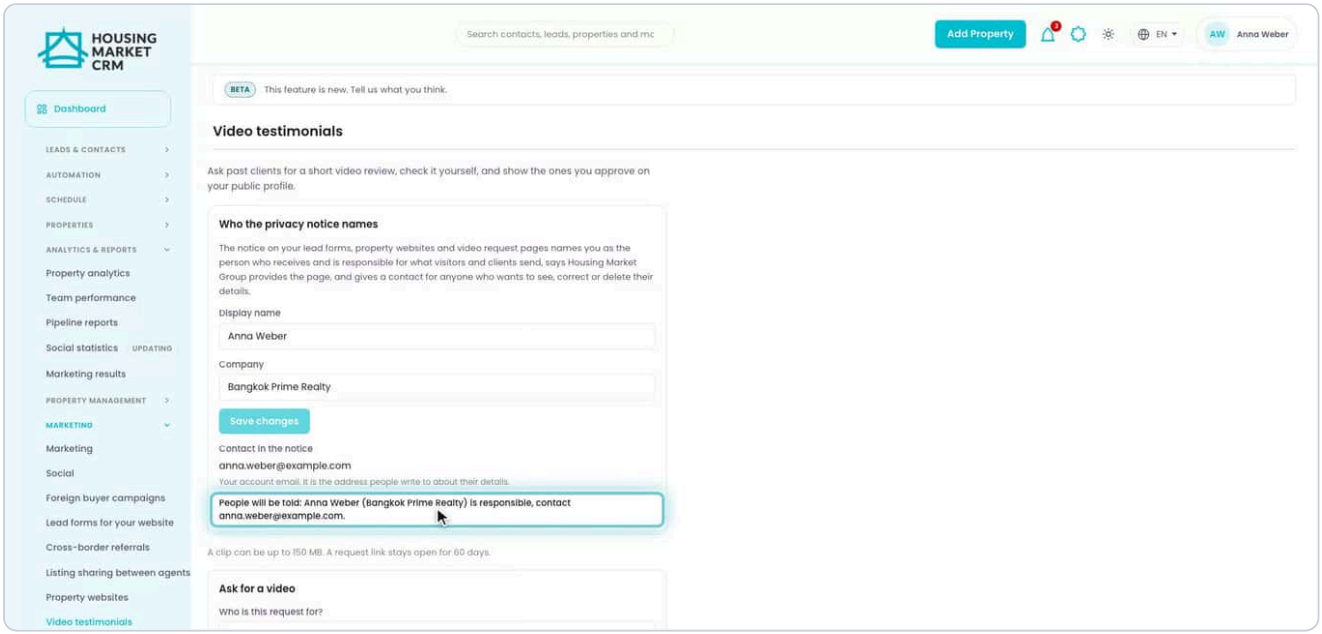


Figure 142.5 · Screen recorded 29 October 2026

6 The screen shows how large a clip can be, and how long a link stays open.

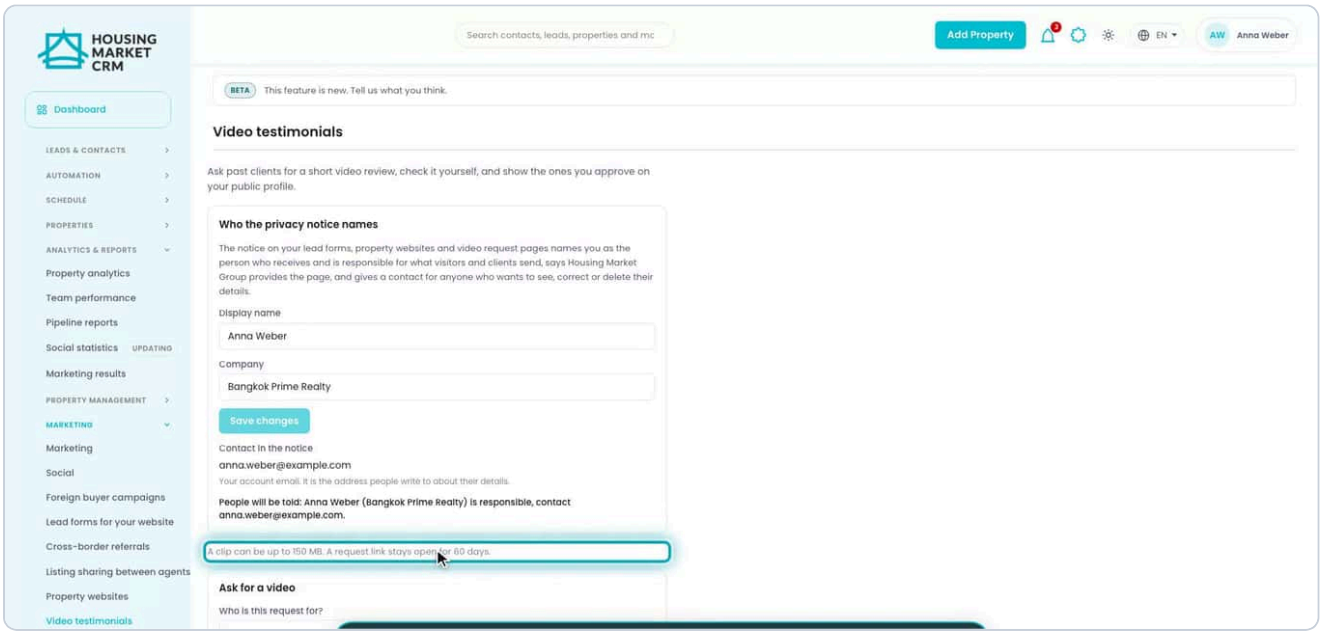


Figure 142.6 · Screen recorded 29 October 2026

7 Say who the request is for. **Only you** see this.

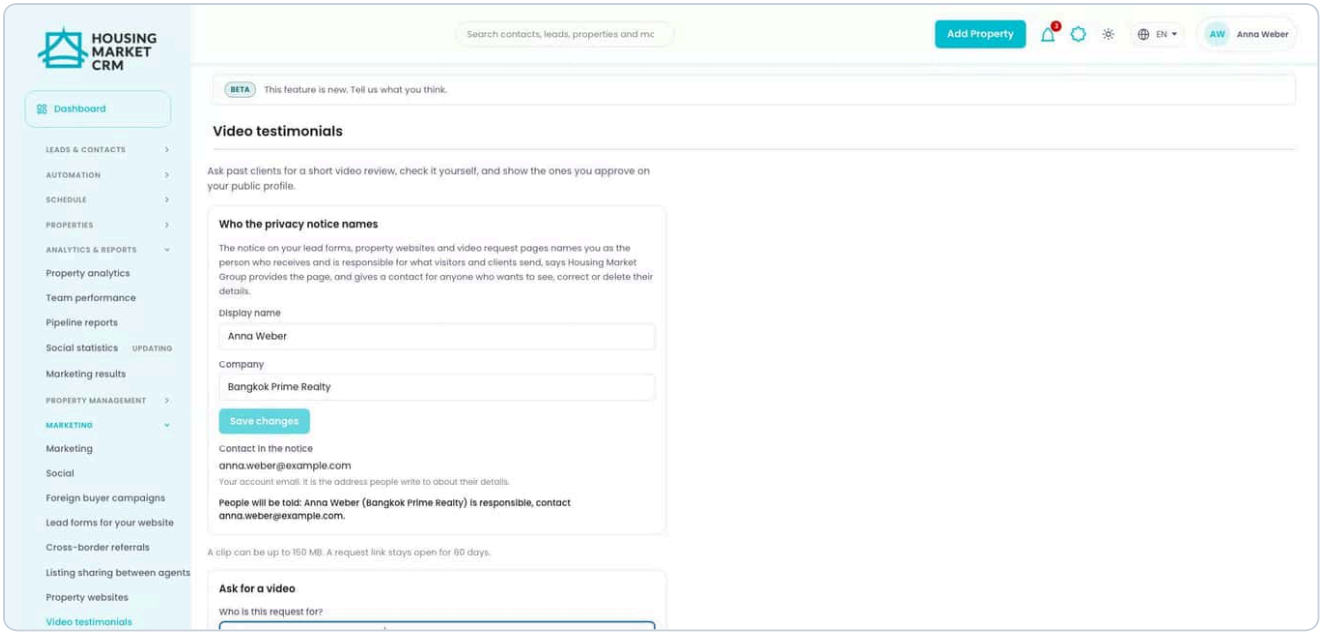


Figure 142.7 · Screen recorded 29 October 2026

8 Click **Create the request link**.

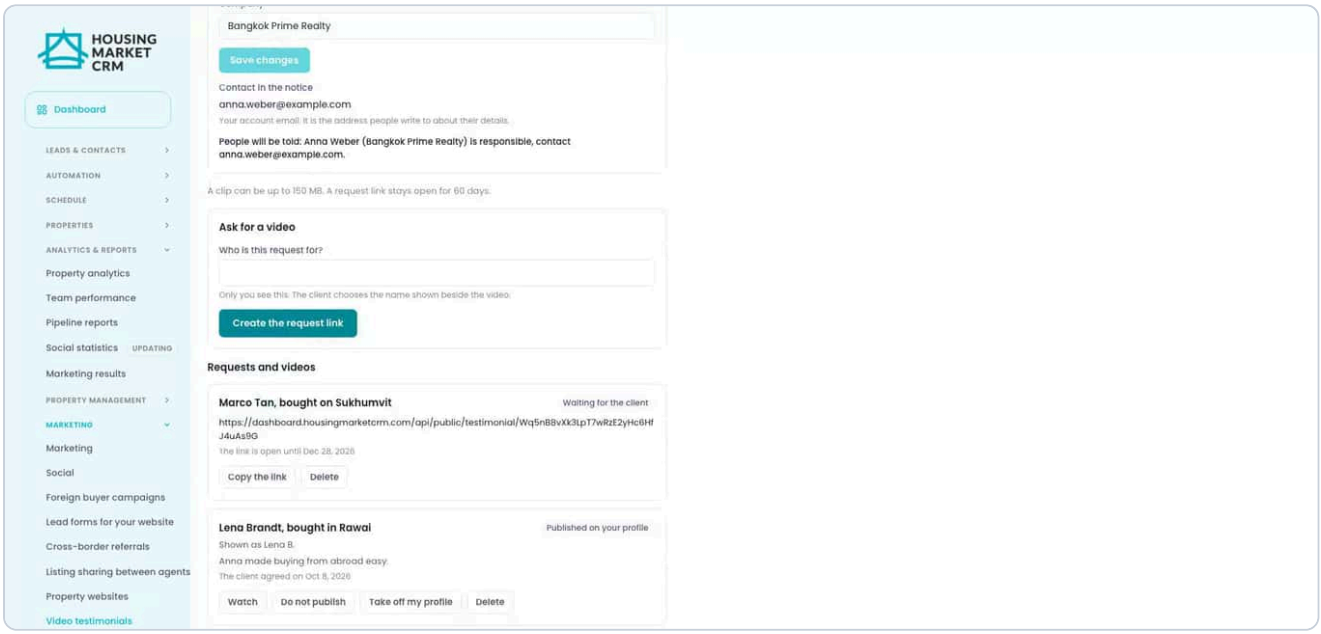


Figure 142.8 · Screen recorded 29 October 2026

9 The request waits for the client. **You** hand them the link.

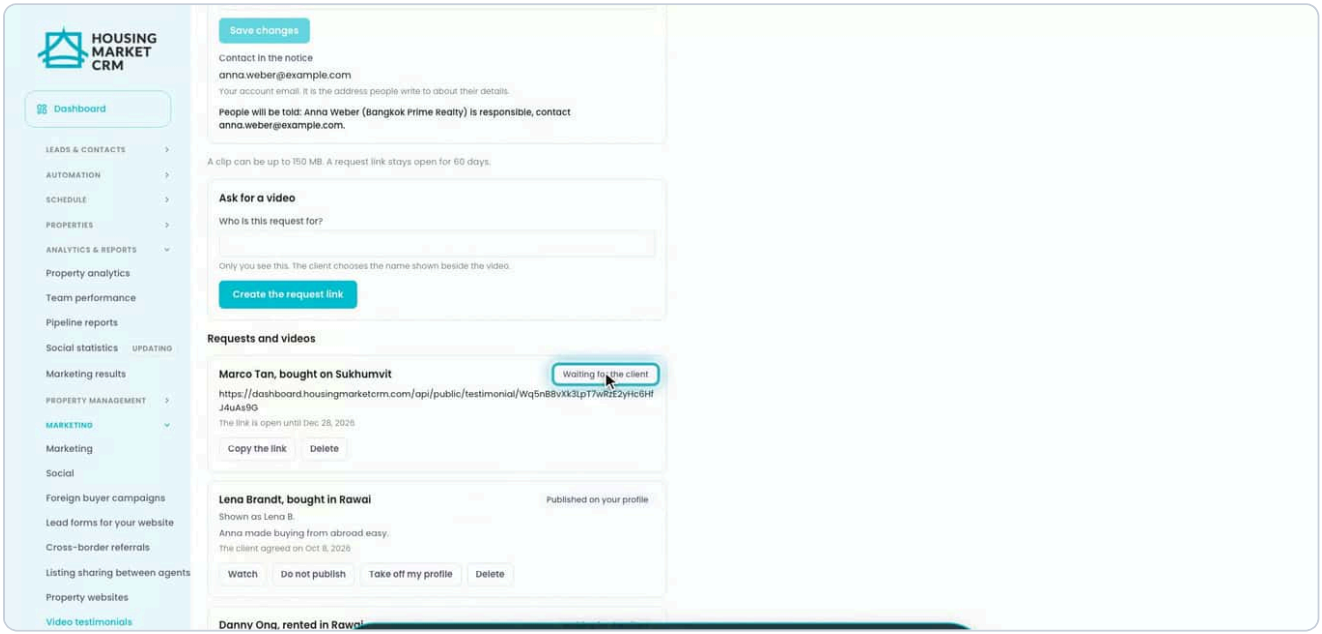


Figure 142.9 · Screen recorded 29 October 2026

10 Copy the link and send it yourself.

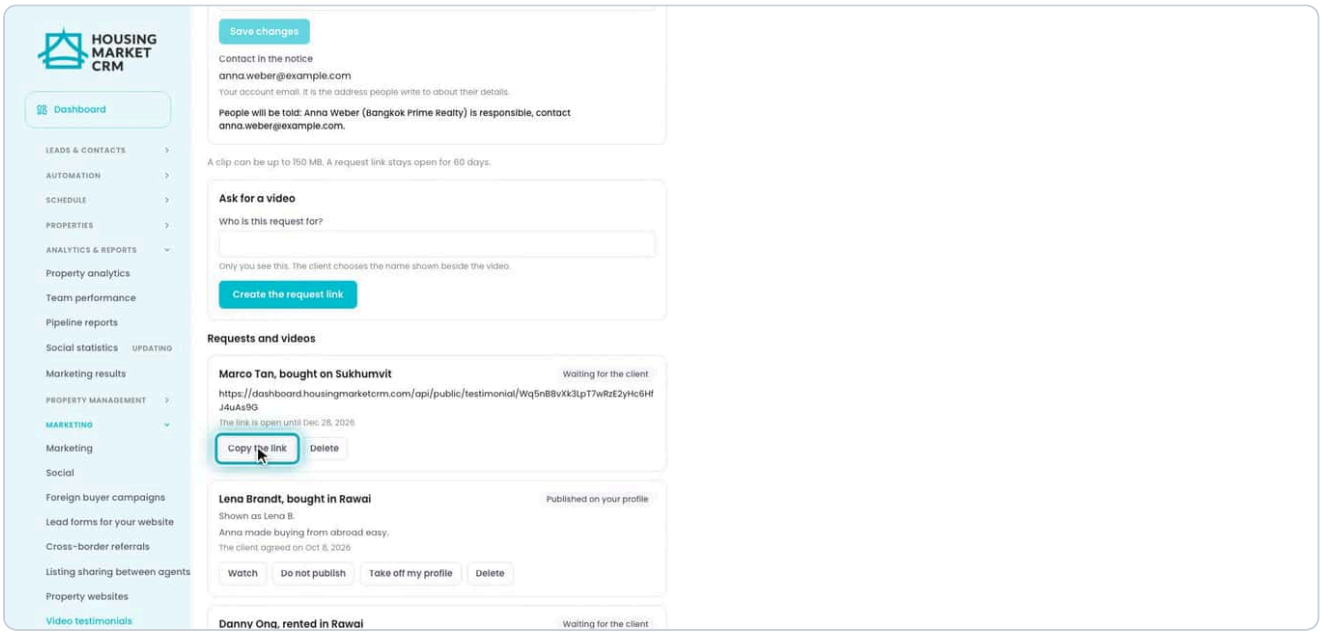


Figure 142.10 · Screen recorded 29 October 2026

11 When the client has sent a video, the request is ready for you.

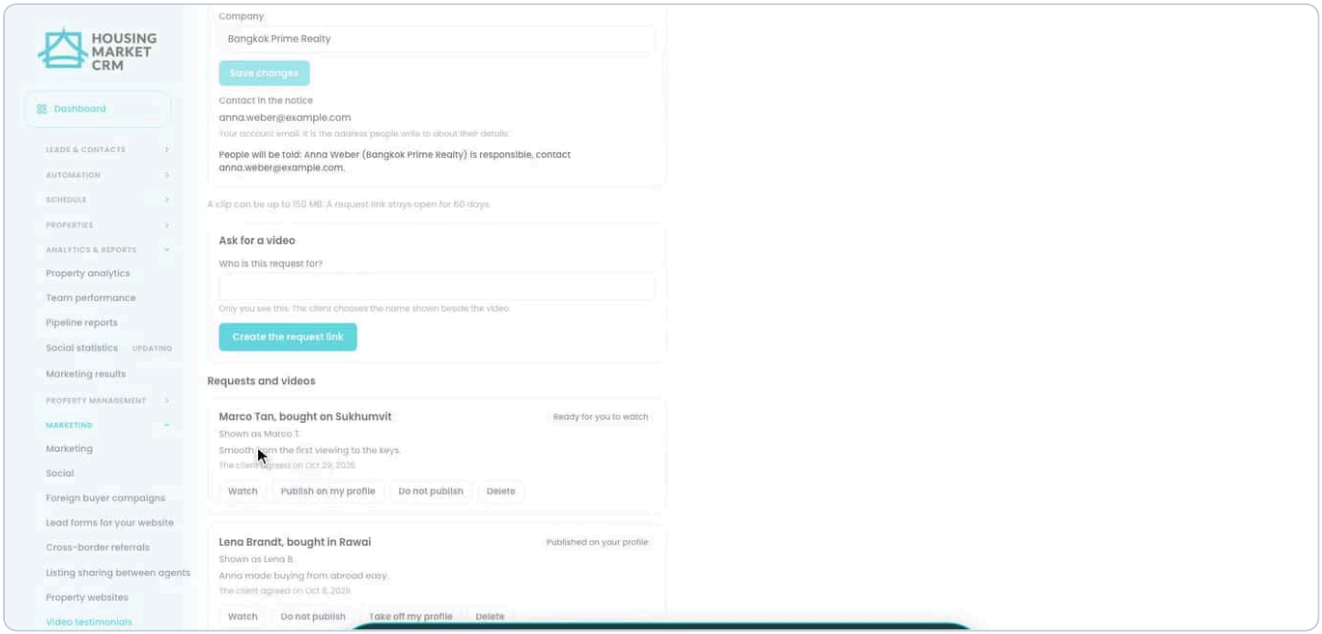


Figure 142.11 · Screen recorded 29 October 2026

12 It shows **ready for you to watch**, and the date the client agreed.

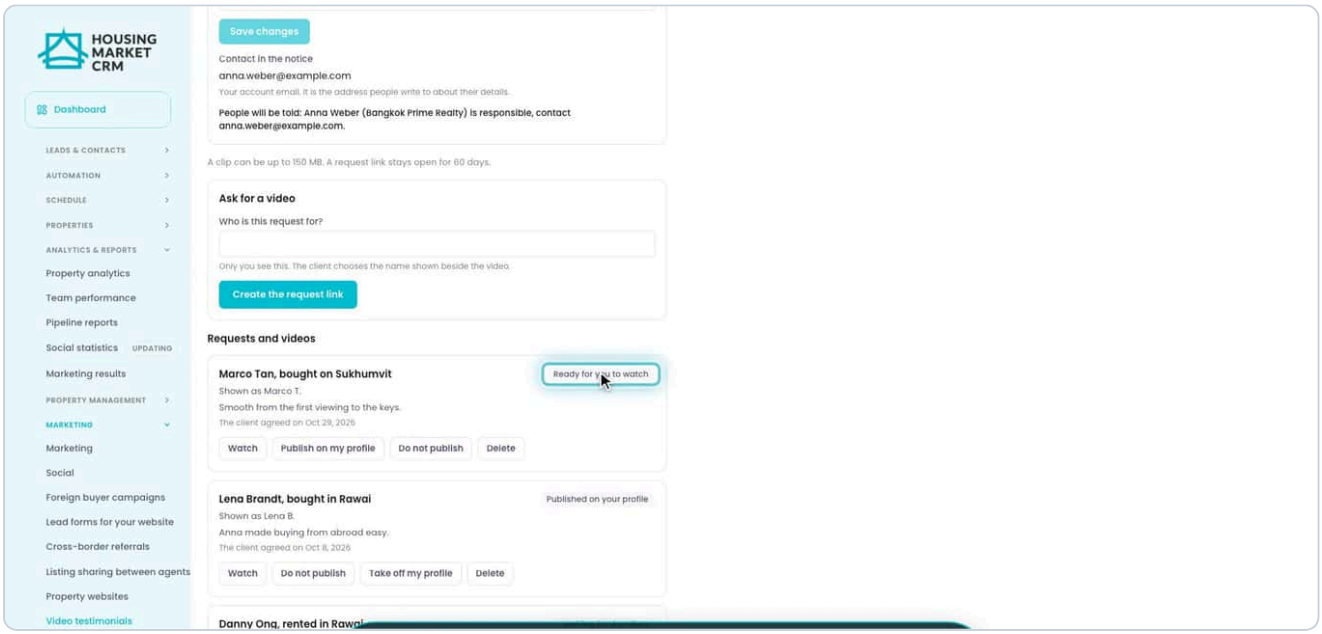


Figure 142.12 · Screen recorded 29 October 2026

13 Watch it first. Nothing is public yet.

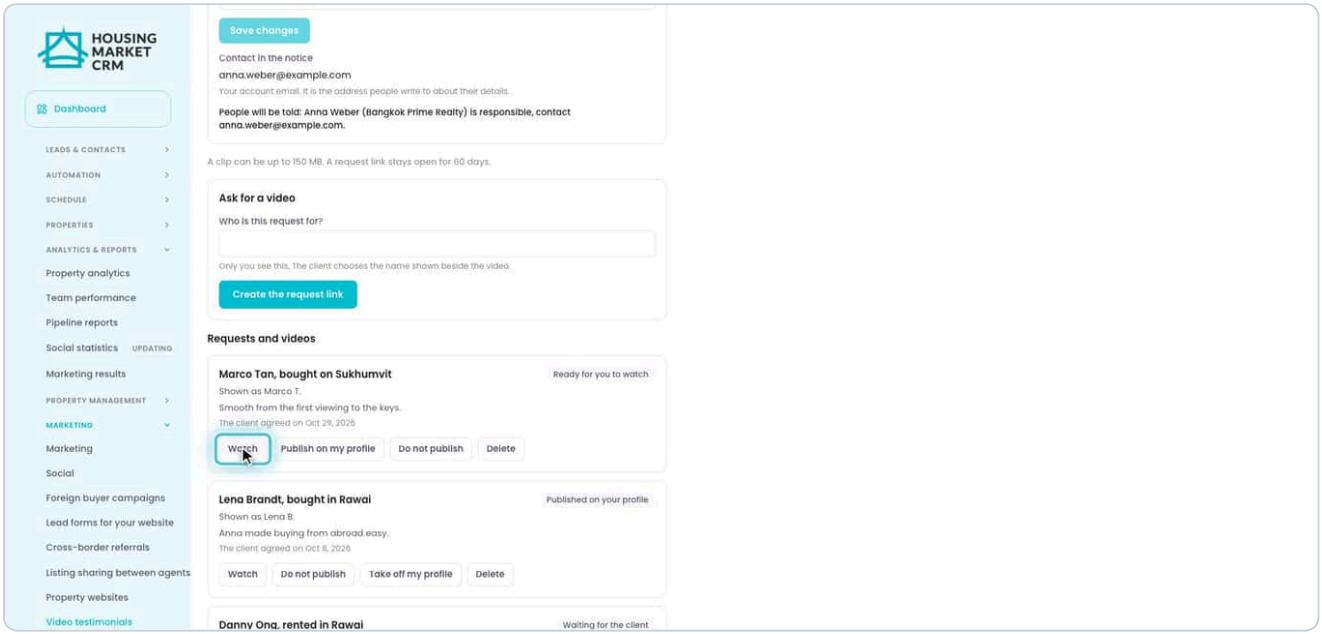


Figure 142.13 · Screen recorded 29 October 2026

14 You can choose Do not publish or Publish on my profile.

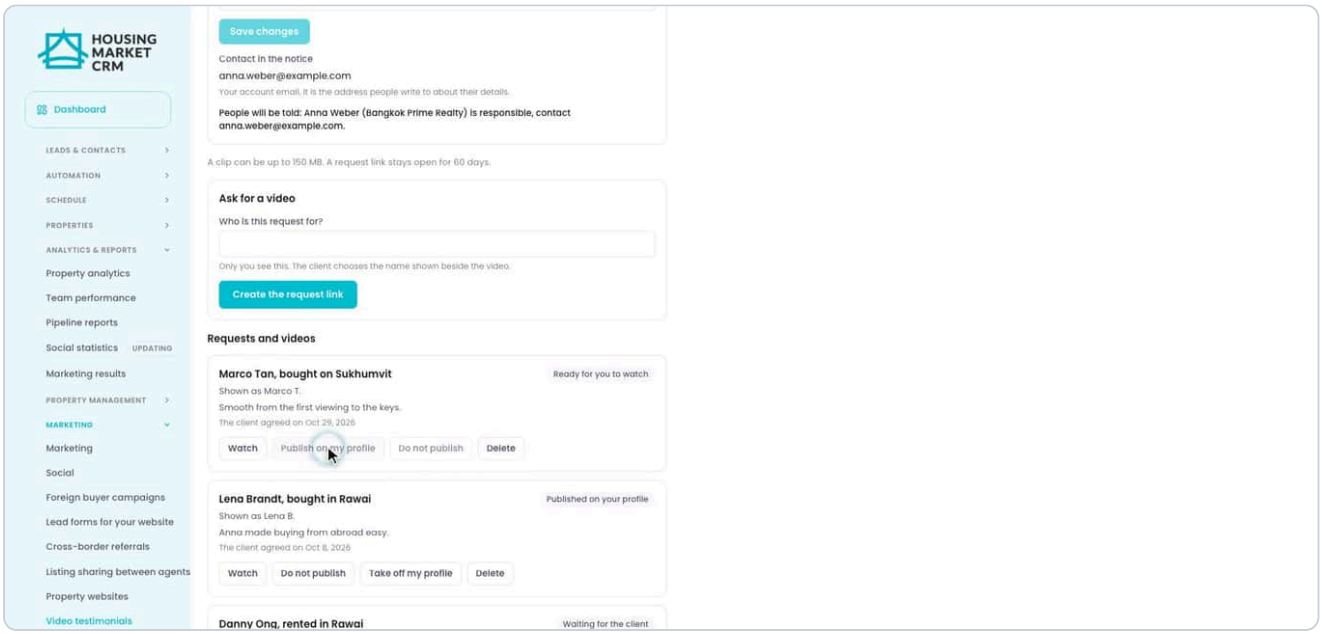


Figure 142.14 · Screen recorded 29 October 2026

15 It is **published on your profile**.

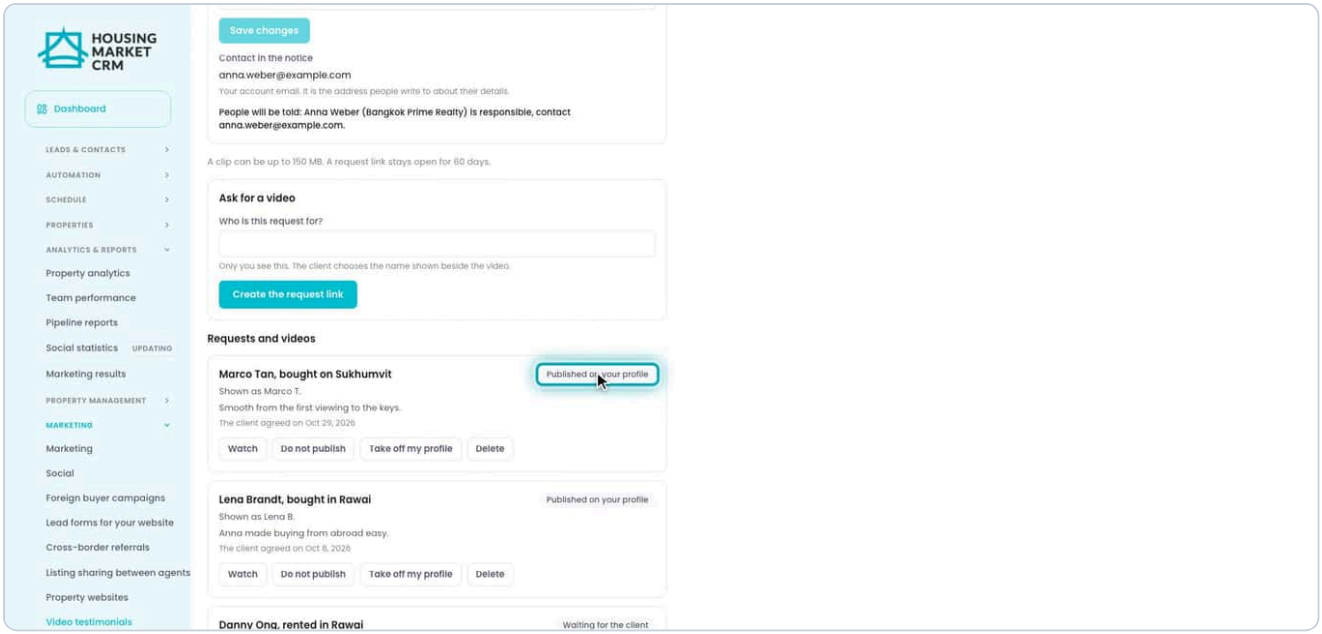


Figure 142.15 · Screen recorded 29 October 2026

16 Change your mind? **Take it off my profile** at any time.

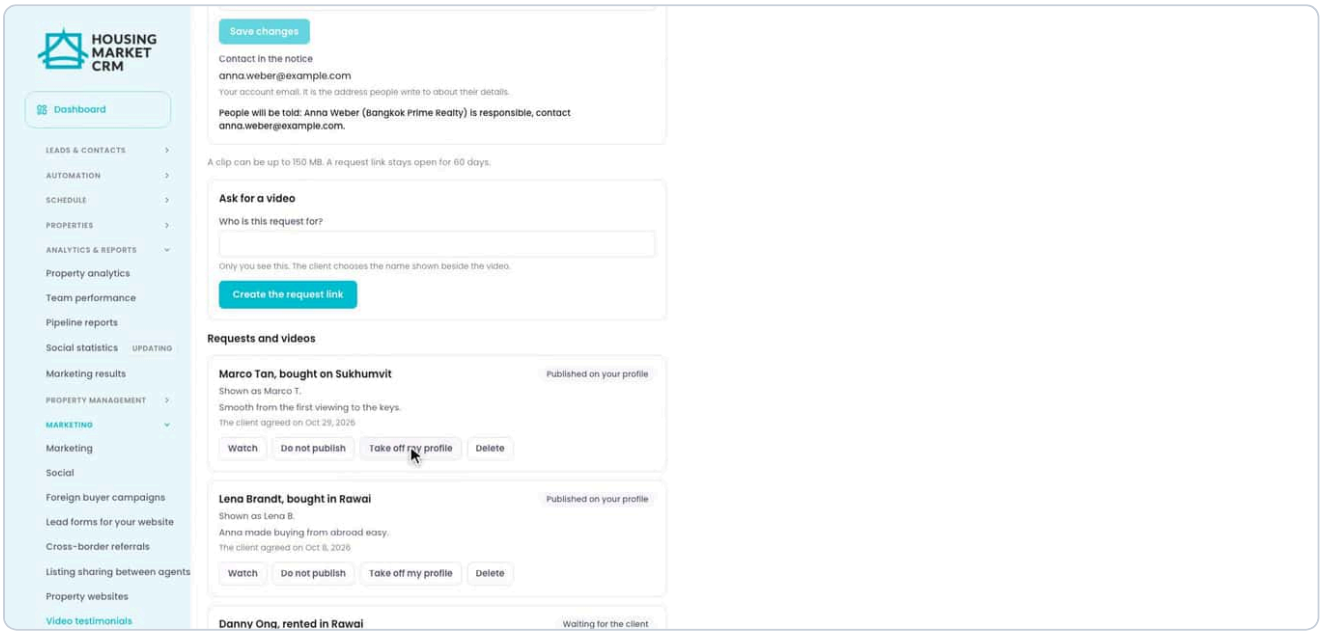


Figure 142.16 · Screen recorded 29 October 2026

143 CHAPTER 143

The Marketing Business tools: a tour

Business | For agents | Watch the video

OVERVIEW

Under Marketing, Business tools gives agencies on the Business plan six tools: campaign ROI, area farming, a brand kit with approvals, a team marketing calendar, developer co-marketing and ad audience sync.

Business tools is for agencies on the Business plan. Under Marketing, choose Business tools.

- Campaign ROI shows what happened after your email campaigns: who was sent each one, the leads that followed, the deals won from those leads and the commission recorded on them. Costs are what you type, because the CRM records no spend by itself, and commission is compared with cost only in the same currency.
- Area farming works a neighbourhood for sellers. Name the area, choose the agents who work it, write to the people in your own contacts whose address is there and see what came back. Only people who asked to hear from you are written to, and nothing is sent until you confirm it.
- Brand kit and approvals lets the agency set its logo, colour and templates once. If your agency requires approval, an agent's campaign is sent only after a manager has approved it.
- The team marketing calendar shows every email campaign your agency has scheduled or sent, and your scheduled social posts if you have Housing Market Social.
- Developer co-marketing launches a new development that is published on the portals to your own contacts: choose the project, one of your saved segments and a language, check who the email would reach and send it. The developer receives nothing from this, no contacts and no copy of the email.
- Ad audience sync puts people who agreed to it into an advertising audience for Facebook, Instagram and Google. You record each person's consent, your office accepts the platform's terms and you download a hashed customer file to upload yourself. Sending an audience to a platform from the CRM is not available yet.

A retargeting pixel for property websites is not available yet: it needs each visitor's consent and nothing is installed.

From the Help Center: **What are the Business marketing tools?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

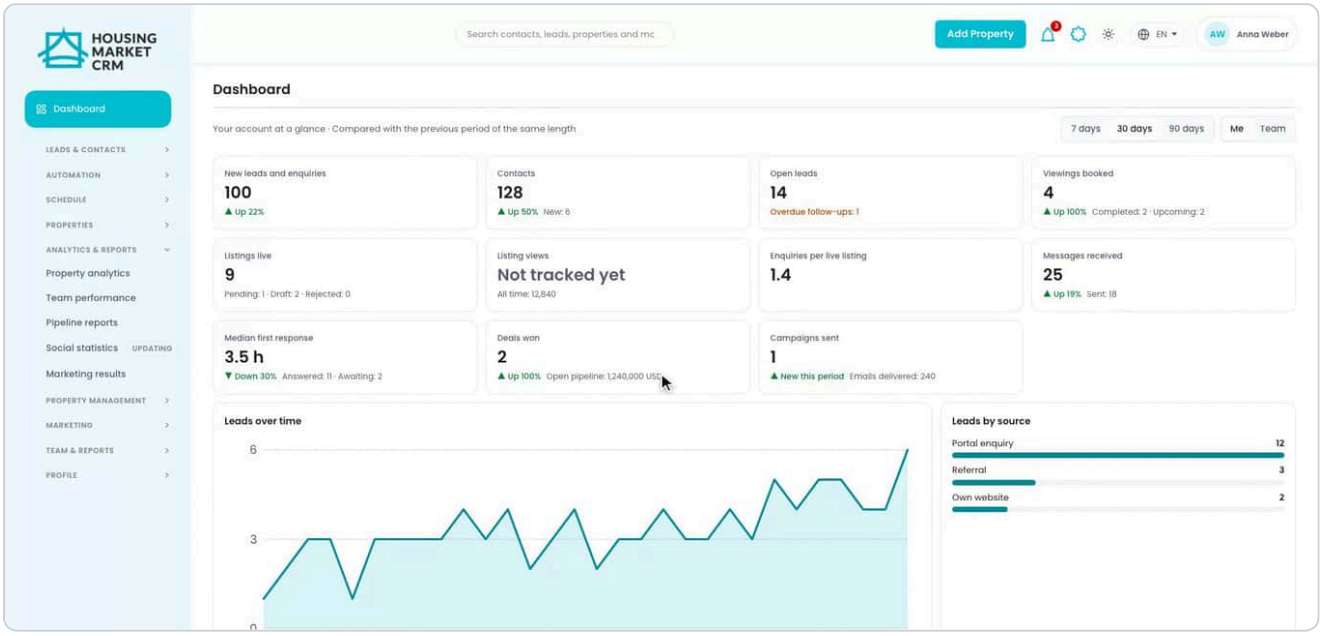


Figure 143.1 · Screen recorded 29 October 2026

2 Open the **Marketing** group in the left menu.

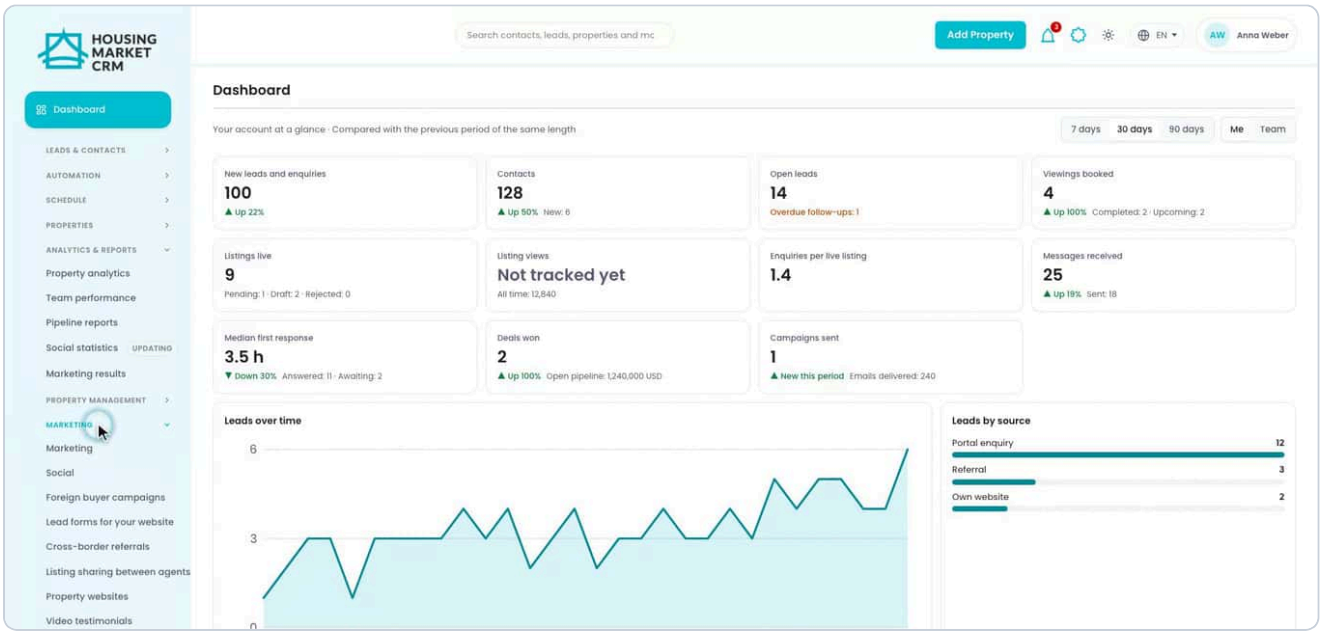


Figure 143.2 · Screen recorded 29 October 2026

3 Click **Business tools.**

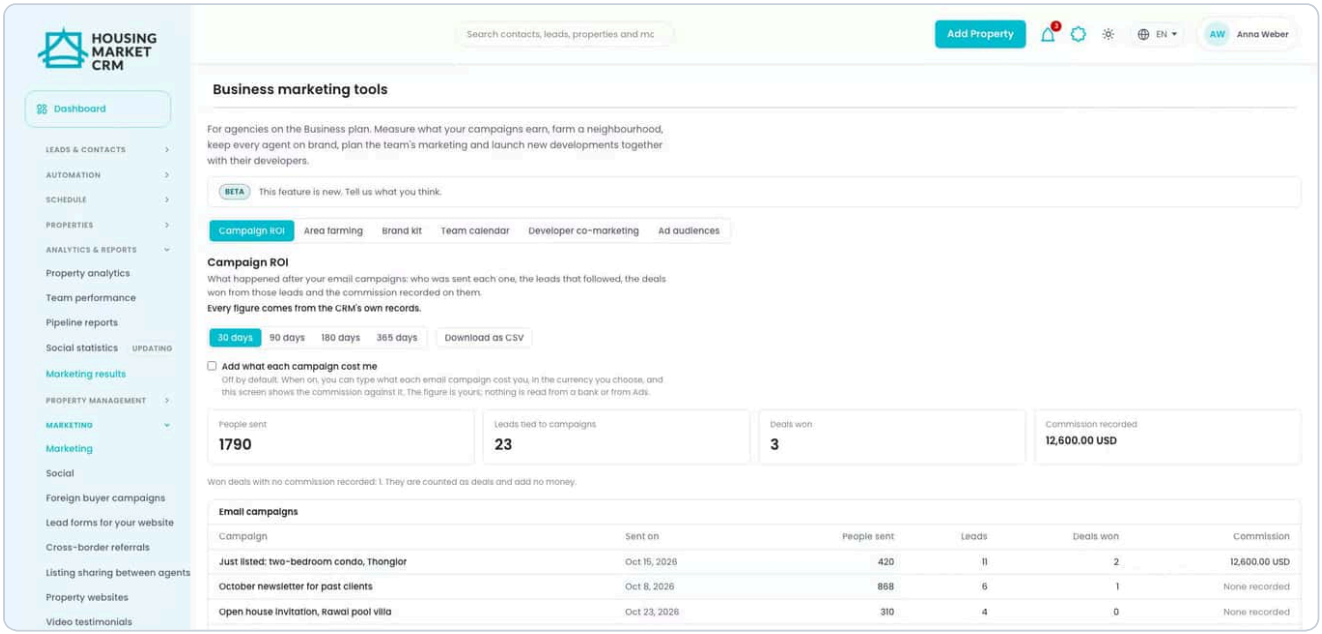


Figure 143.3 · Screen recorded 29 October 2026

4 This feature is new and shows a **Beta** badge while we refine it.

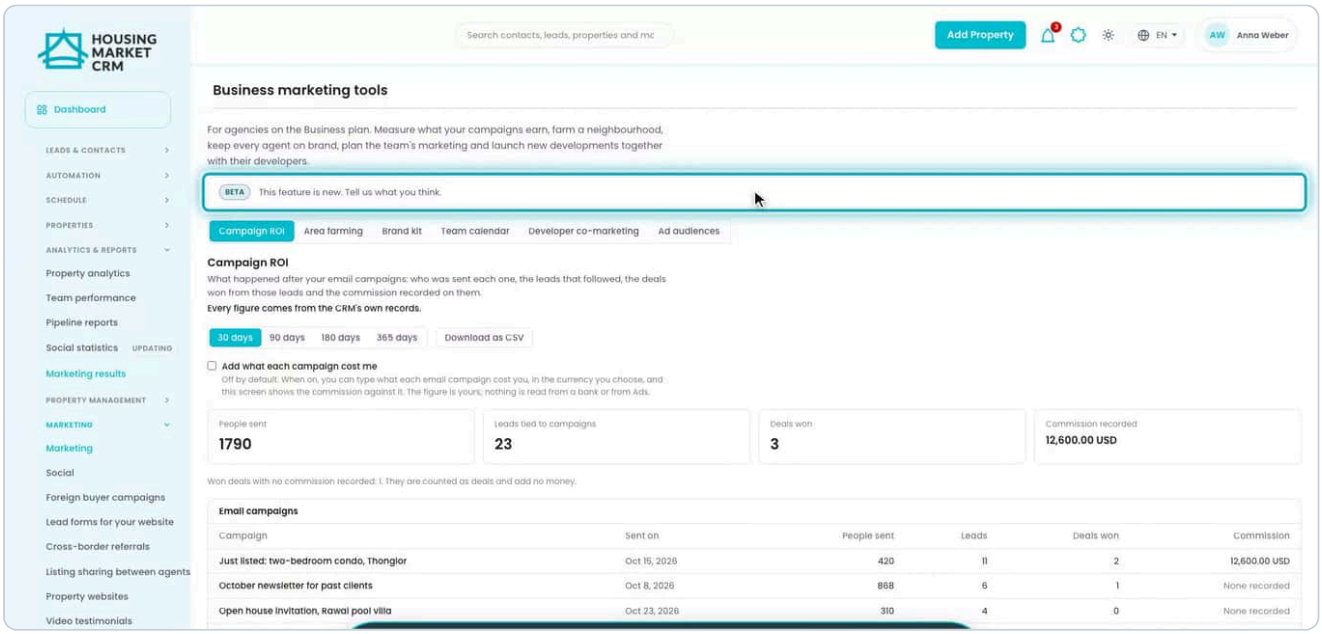


Figure 143.4 · Screen recorded 29 October 2026

5 Six tools, one tab each, for agencies on the **Business plan**.

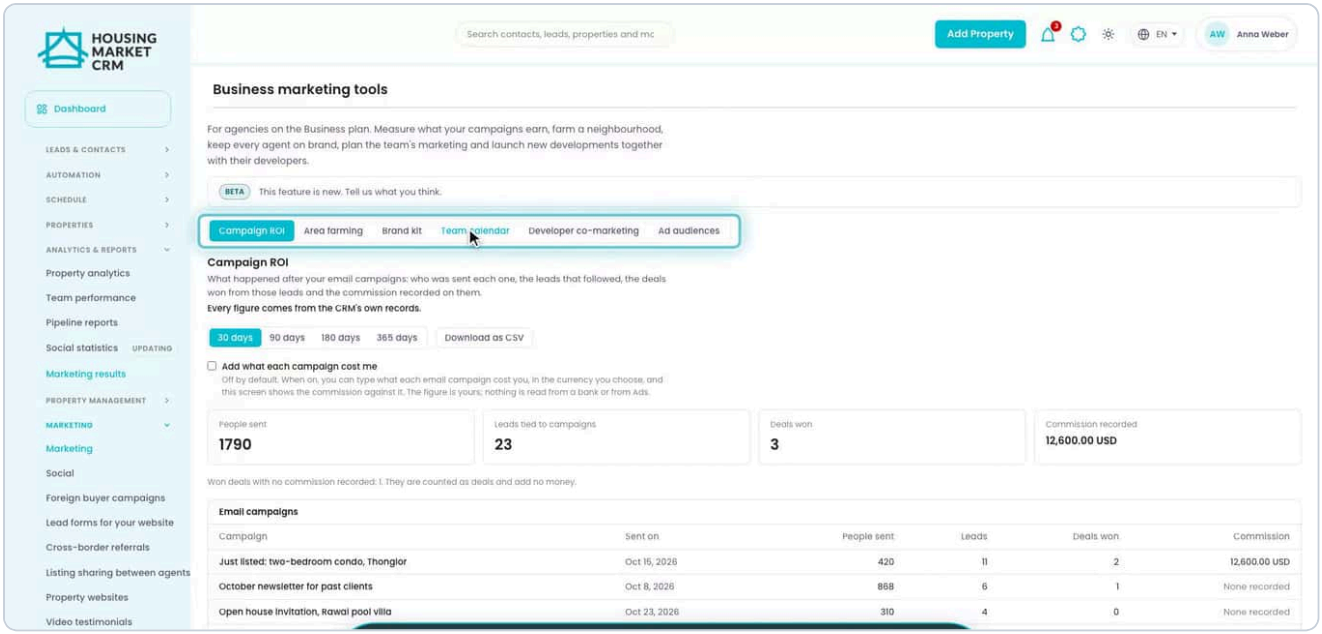


Figure 143.5 · Screen recorded 29 October 2026

6 Every figure comes from the **CRM's own records**.

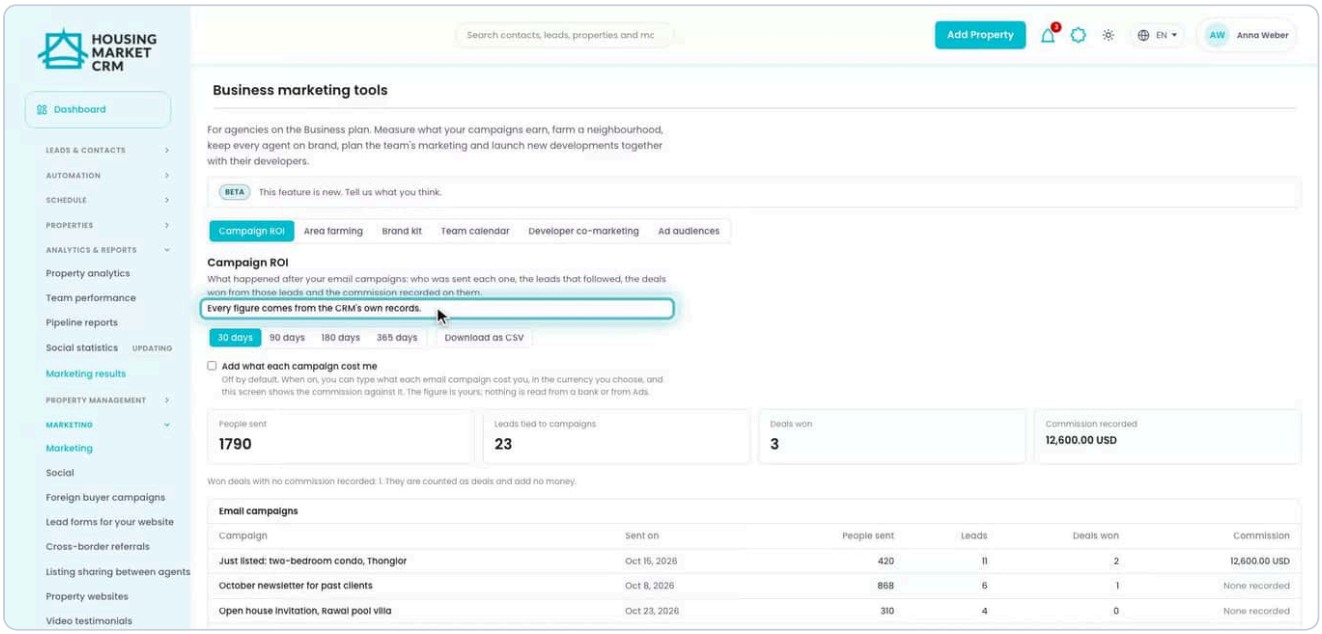


Figure 143.6 · Screen recorded 29 October 2026

7 See the **leads**, **deals won** and **commission** after each campaign.

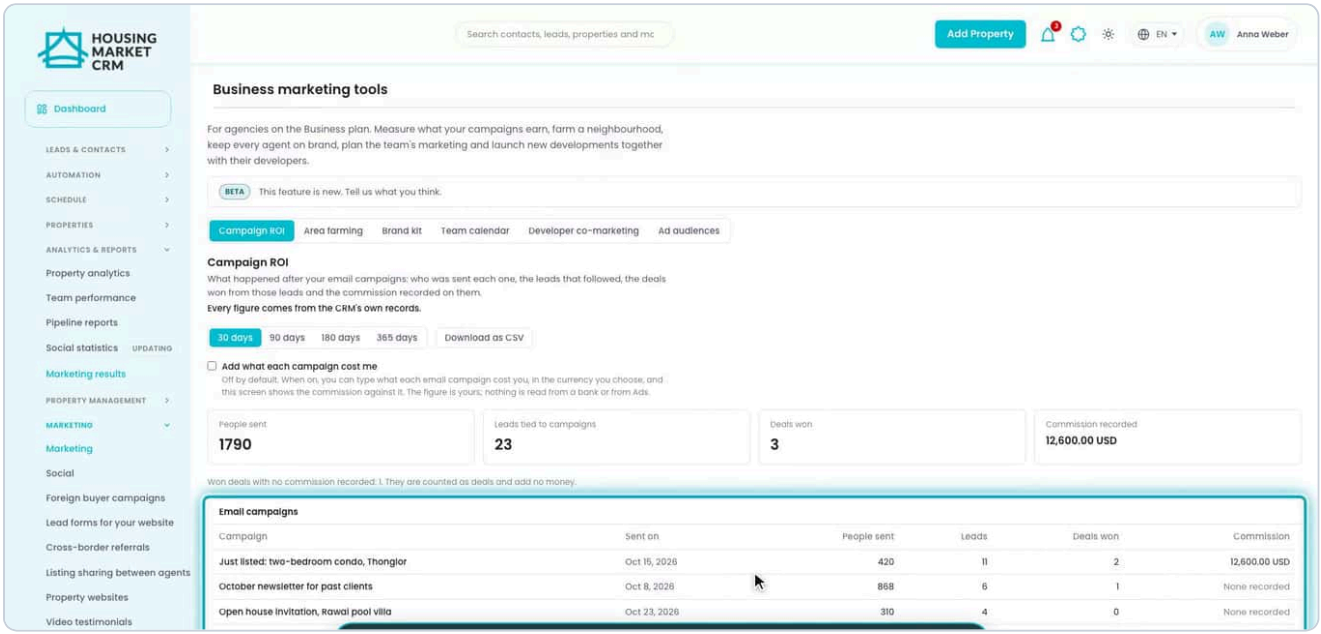


Figure 143.7 · Screen recorded 29 October 2026

8 No cost is recorded, so the figures are the **return**, not the profit.

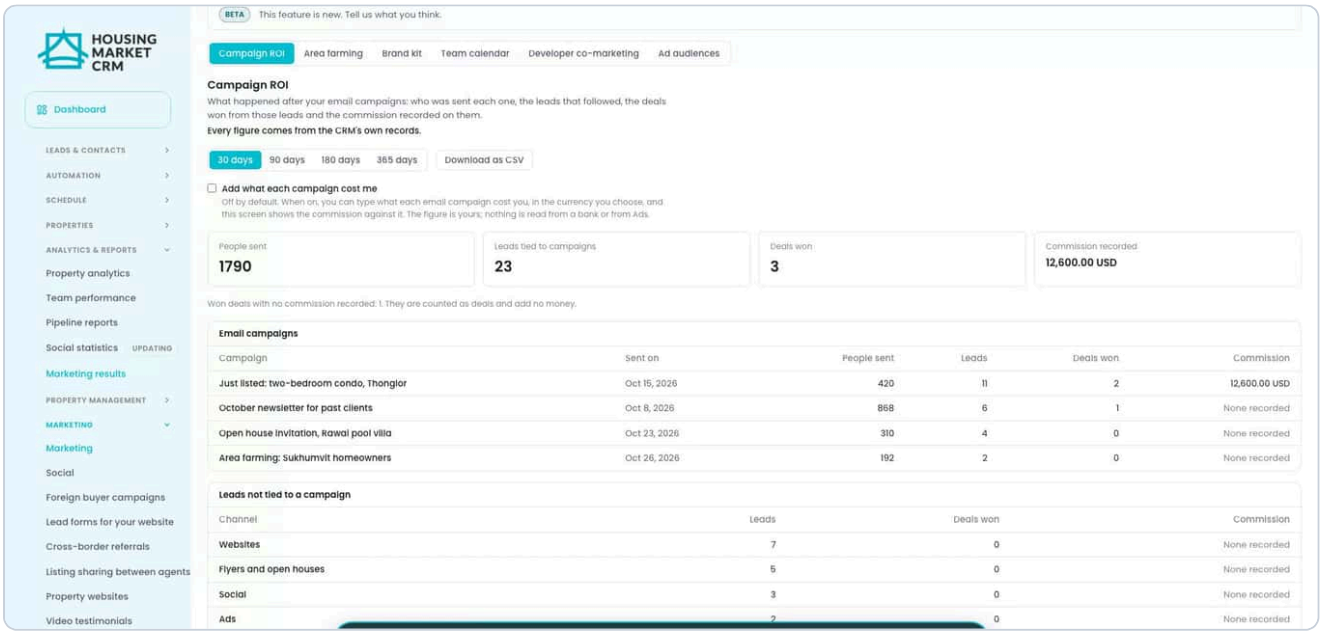


Figure 143.8 · Screen recorded 29 October 2026

9 Open **Area farming**.

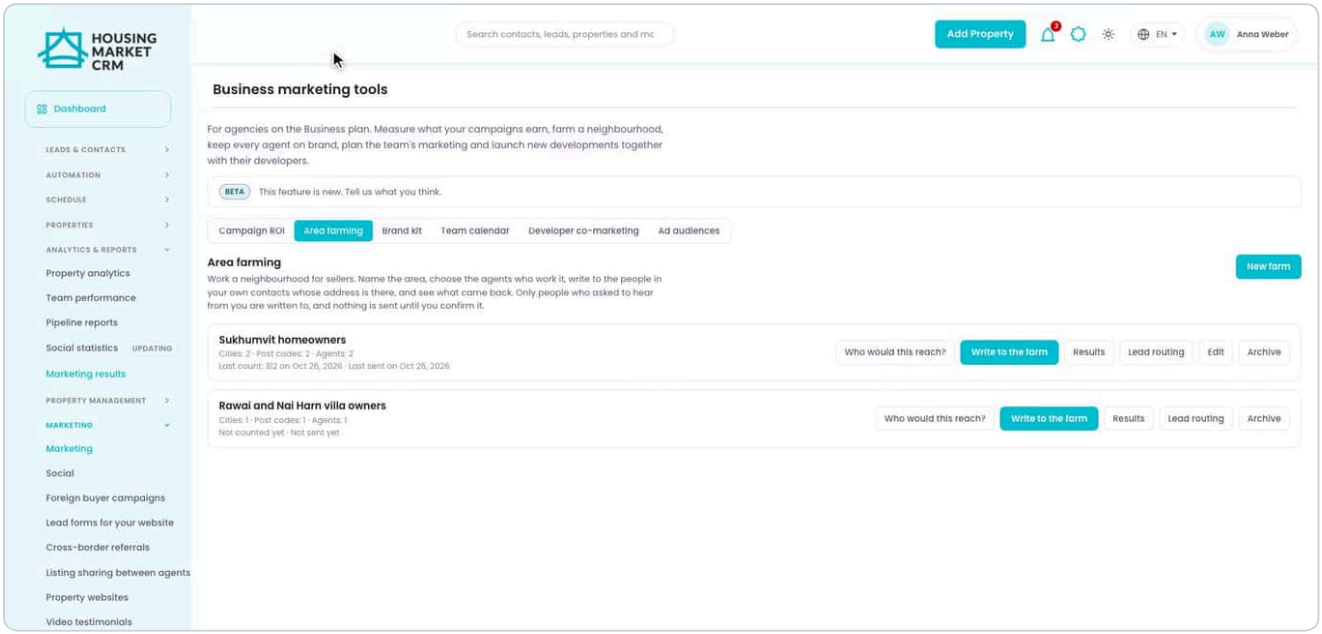


Figure 143.9 · Screen recorded 29 October 2026

10 A farm is a **neighbourhood** worked by the agents you choose.

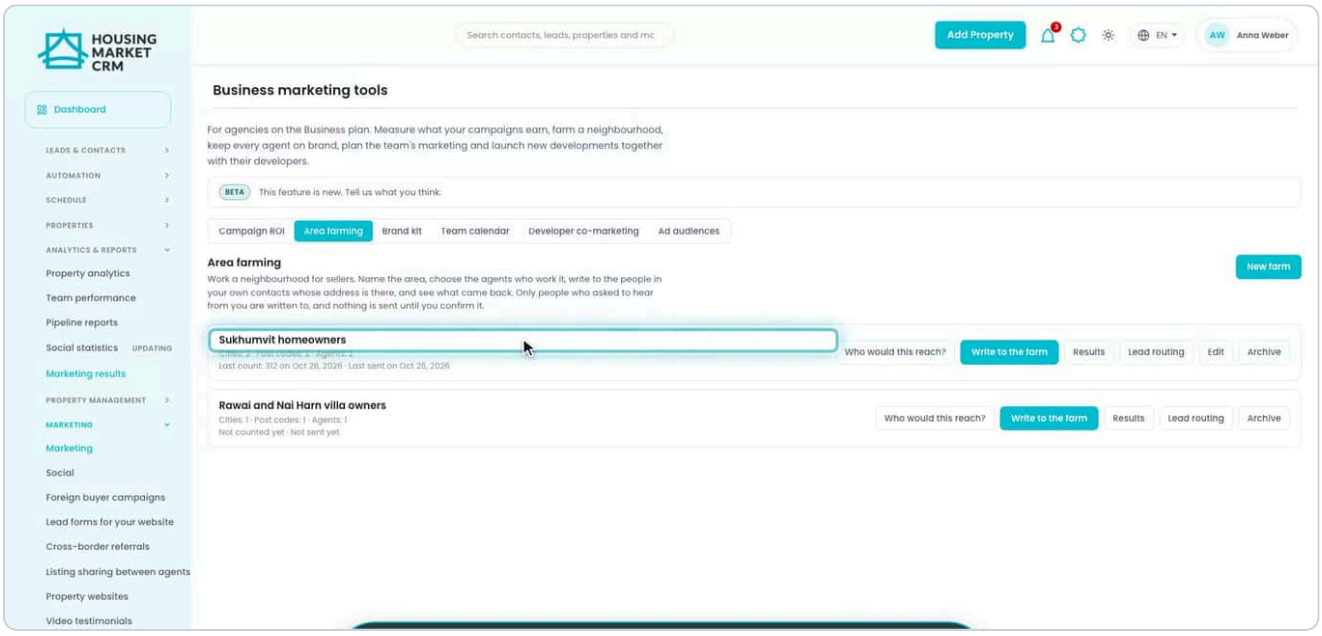


Figure 143.10 · Screen recorded 29 October 2026

11 Click **Who would this reach?**.

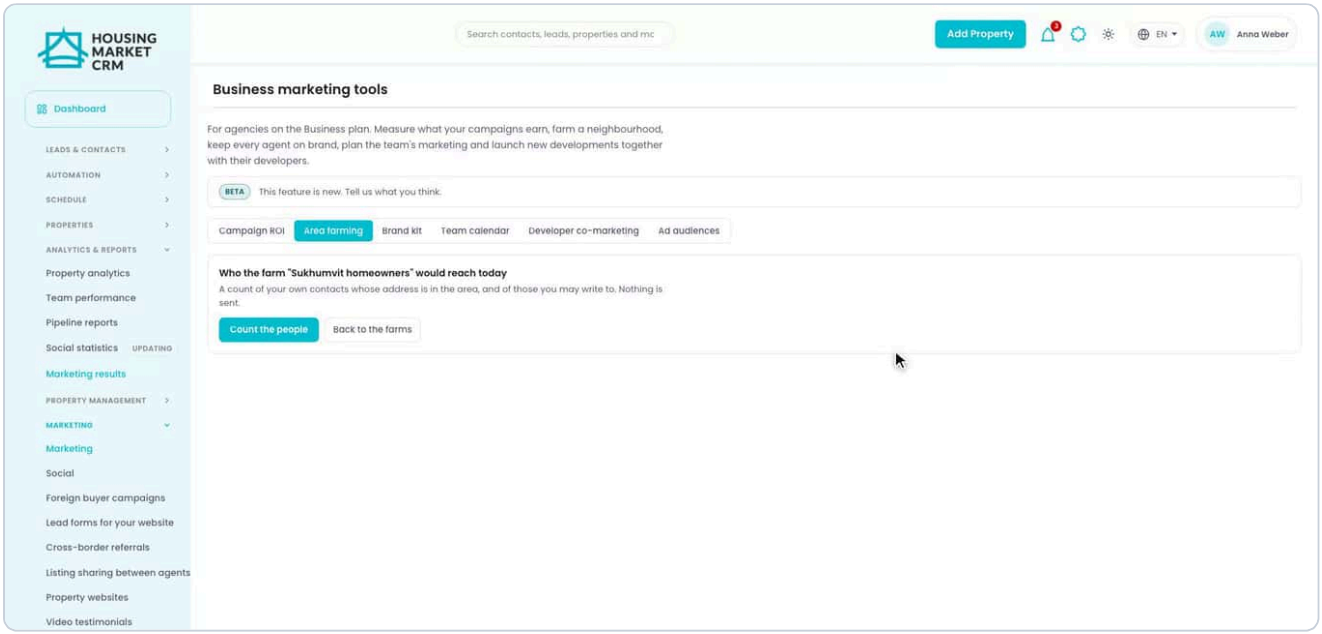


Figure 143.11 · Screen recorded 29 October 2026

12 Click **Count the people**.

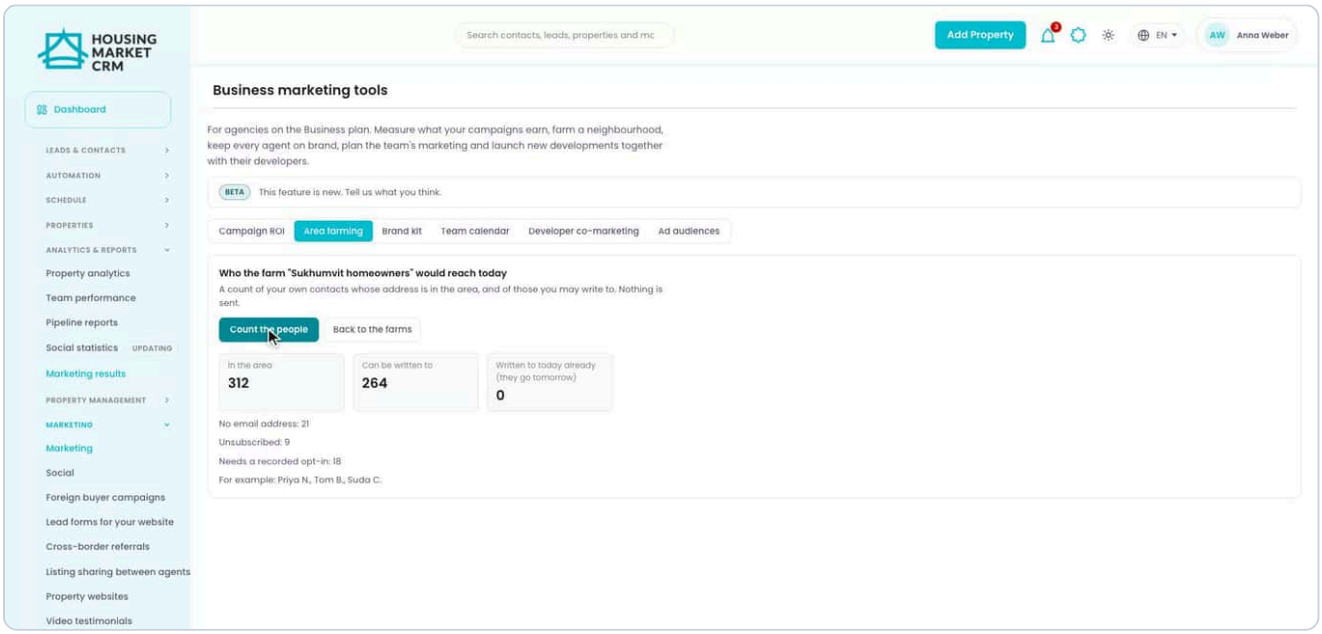


Figure 143.12 · Screen recorded 29 October 2026

13 It counts the people you **may write to**. Nothing is sent.

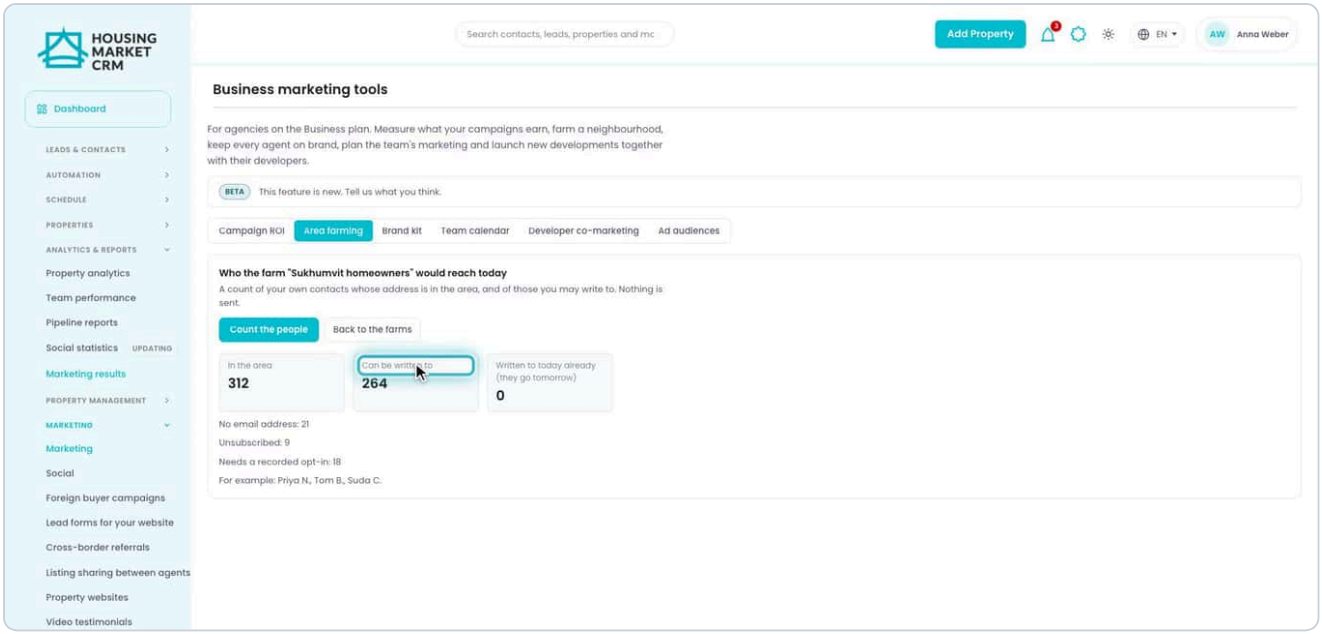


Figure 143.13 · Screen recorded 29 October 2026

14 Open **Brand kit**.

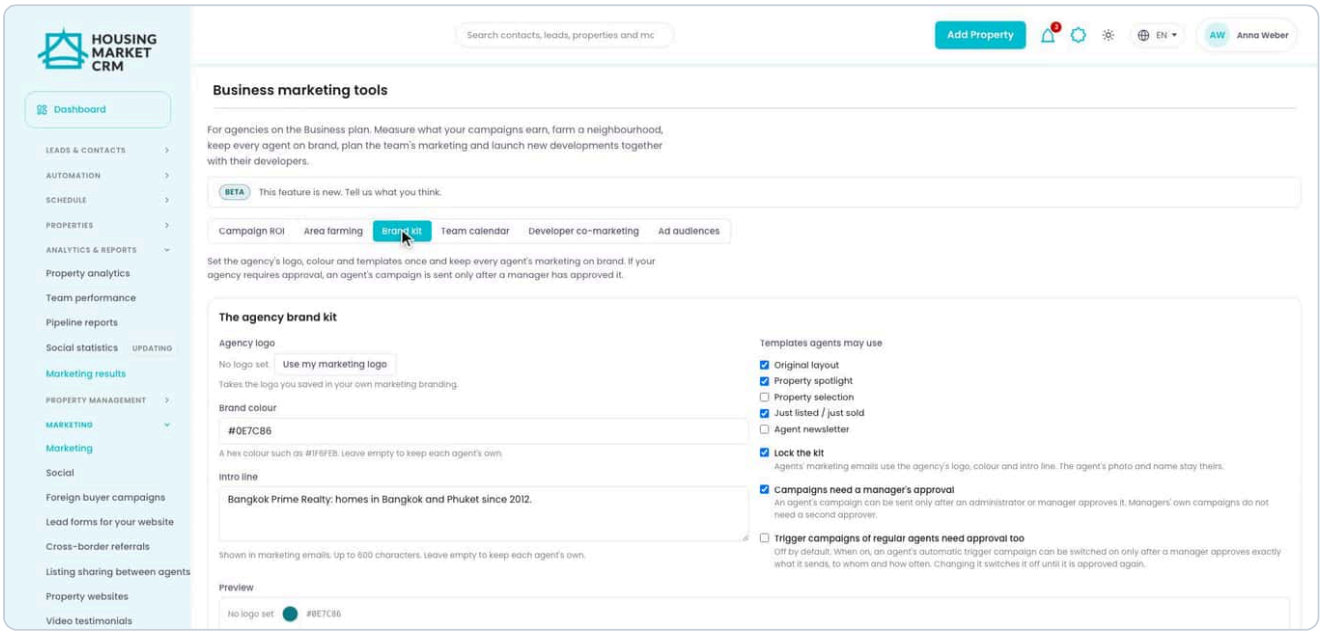


Figure 143.14 · Screen recorded 29 October 2026

15 Set the logo, colour and intro line **once** for the agency.

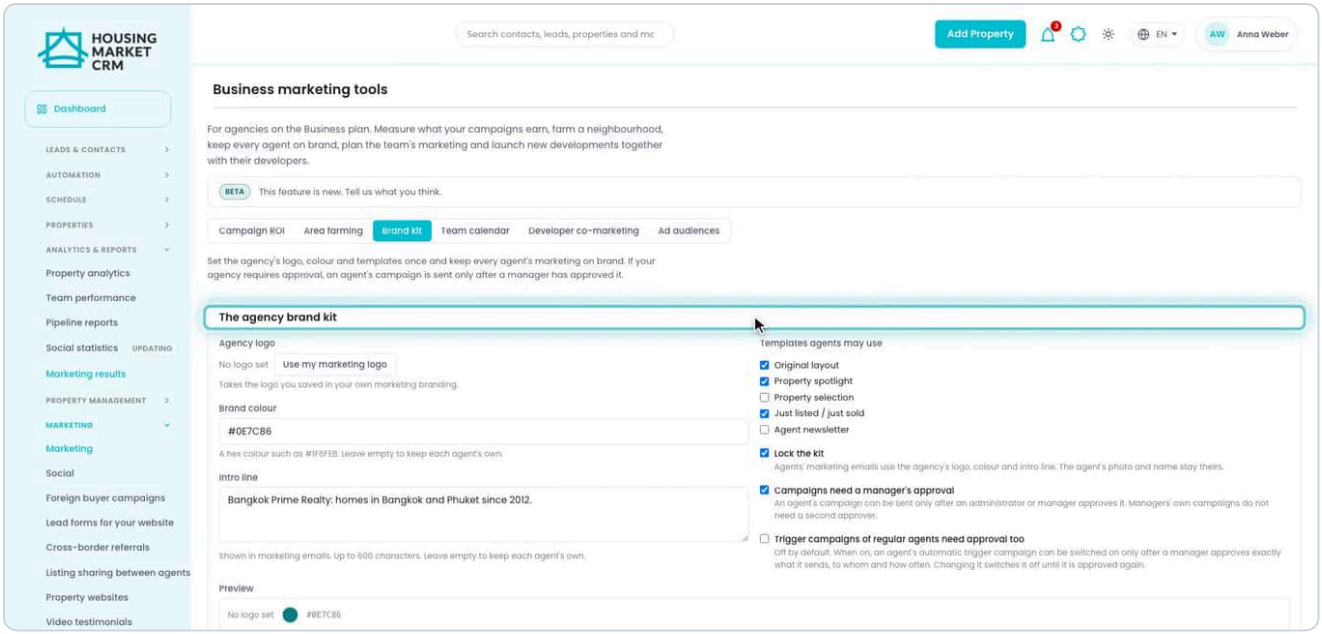


Figure 143.15 · Screen recorded 29 October 2026

16 A manager **approves** an agent's campaign before it is sent.

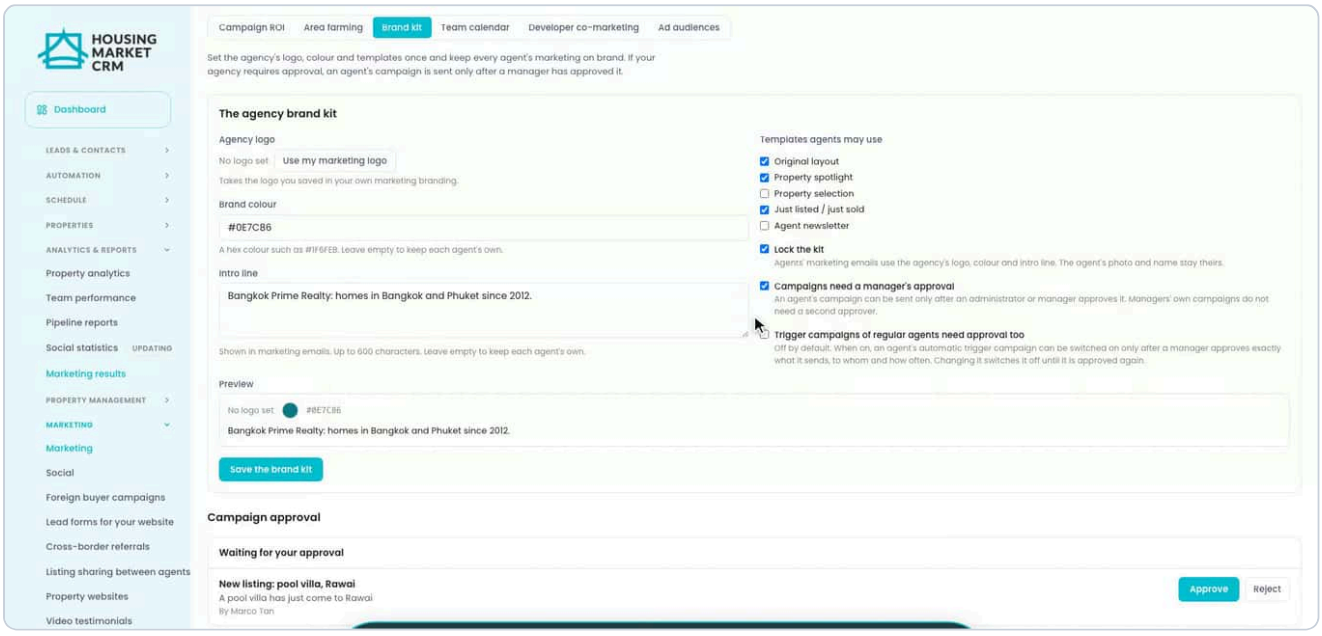


Figure 143.16 · Screen recorded 29 October 2026

17 Open **Team calendar**.

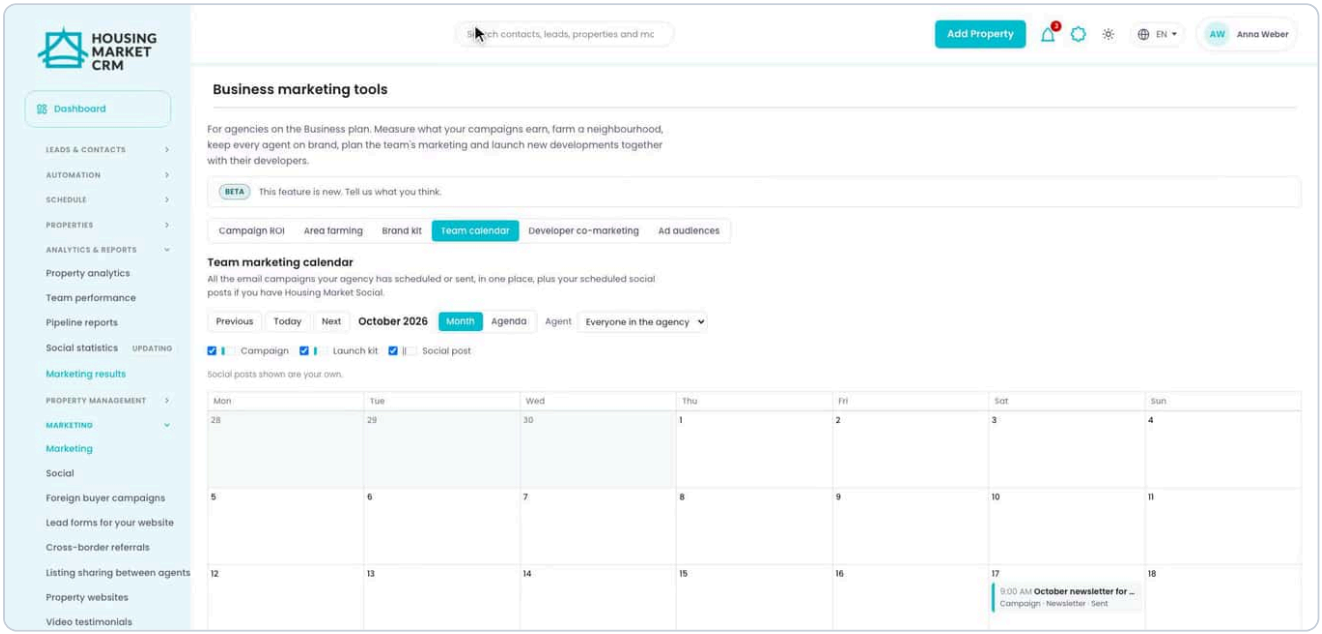


Figure 143.17 · Screen recorded 29 October 2026

18 Every **scheduled and sent campaign** of the agency, in one place.

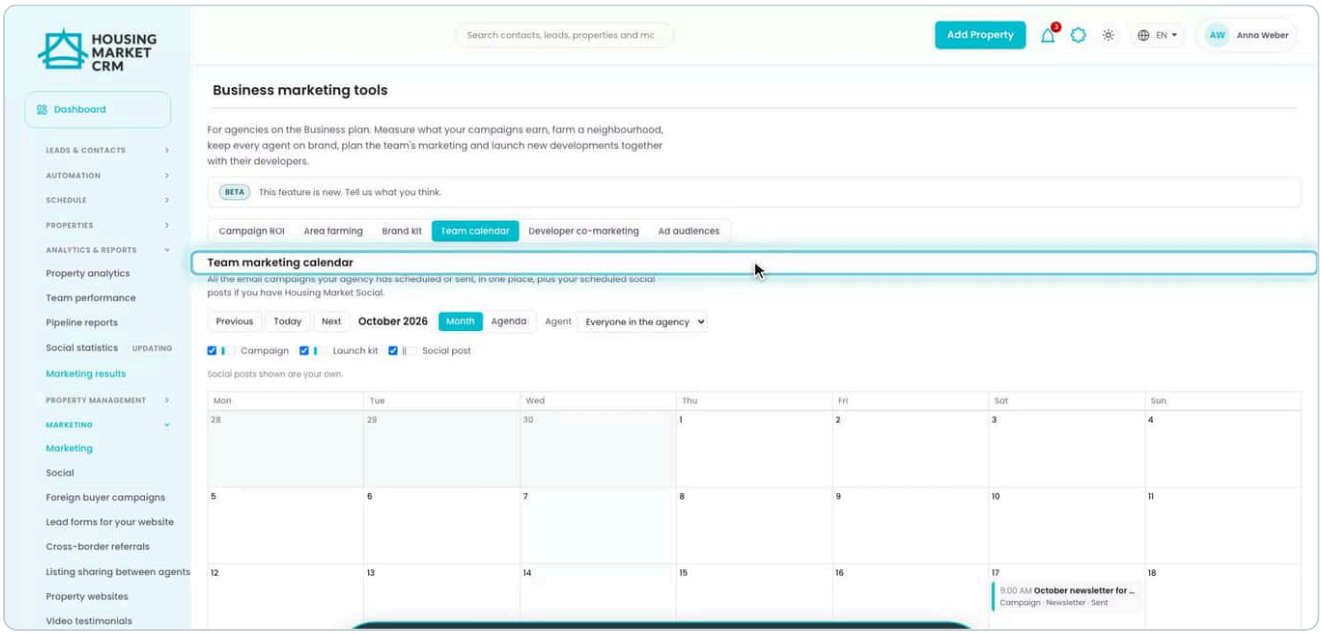


Figure 143.18 · Screen recorded 29 October 2026

19 Filter by agent or by type.

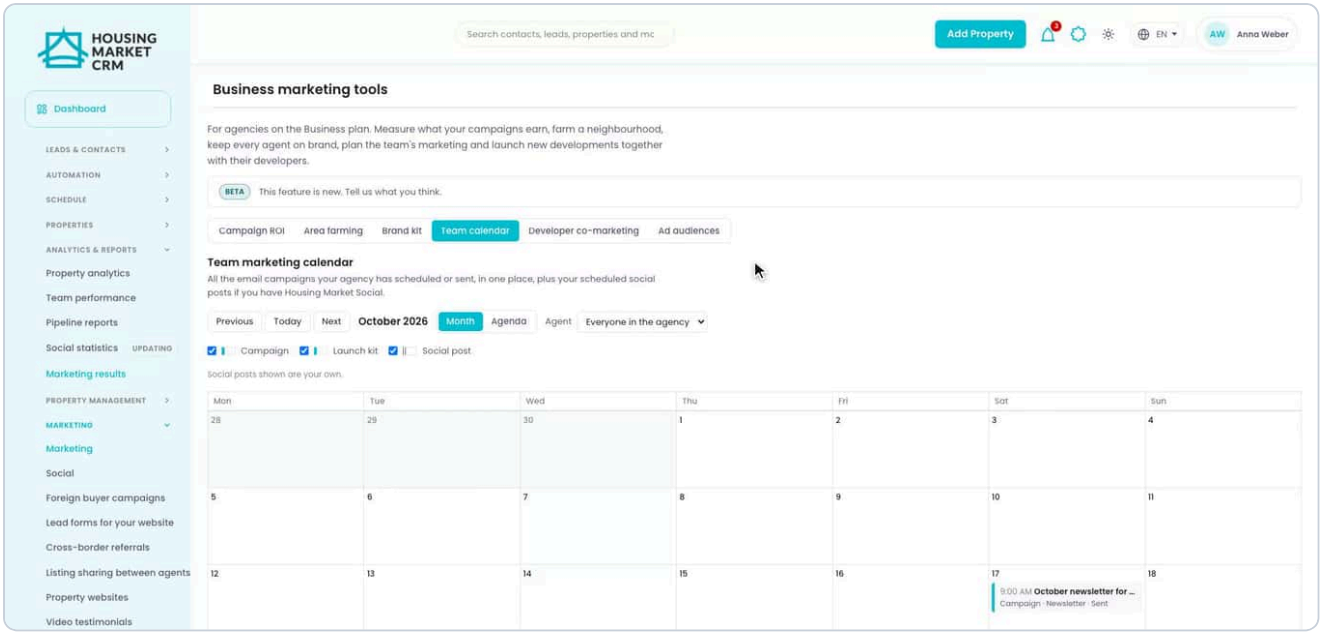


Figure 143.19 · Screen recorded 29 October 2026

20 Open **Developer co-marketing**.

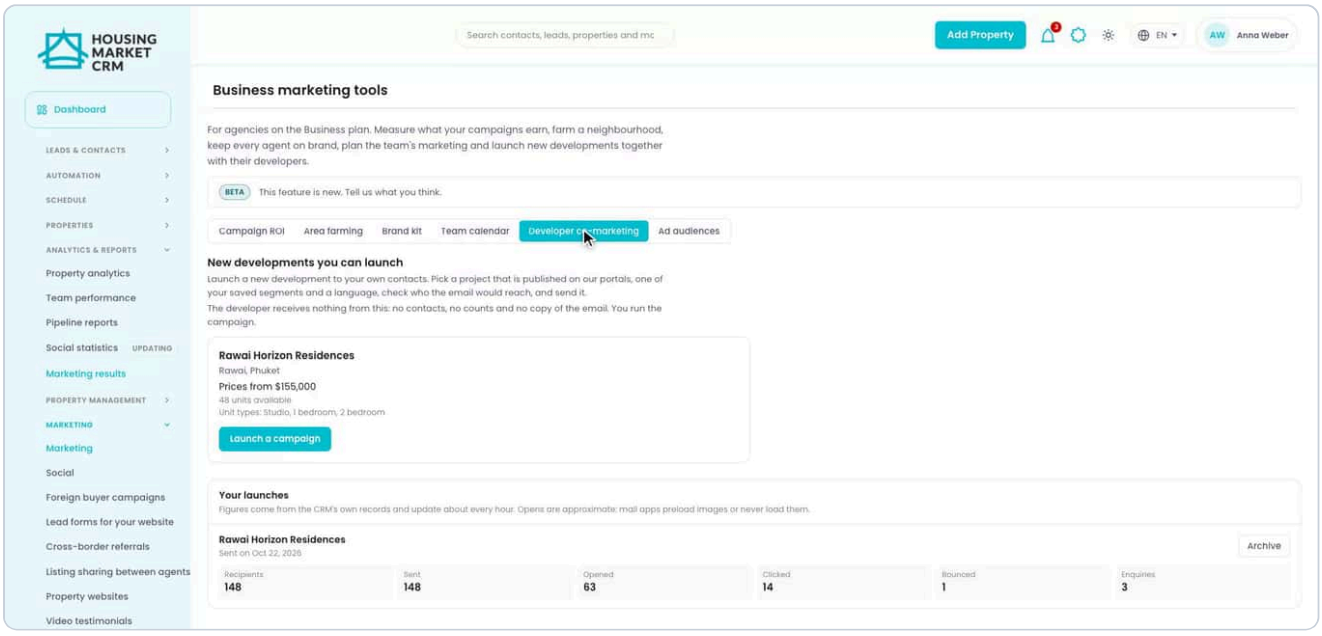


Figure 143.20 · Screen recorded 29 October 2026

21 Launch a **new development** to your own contacts.

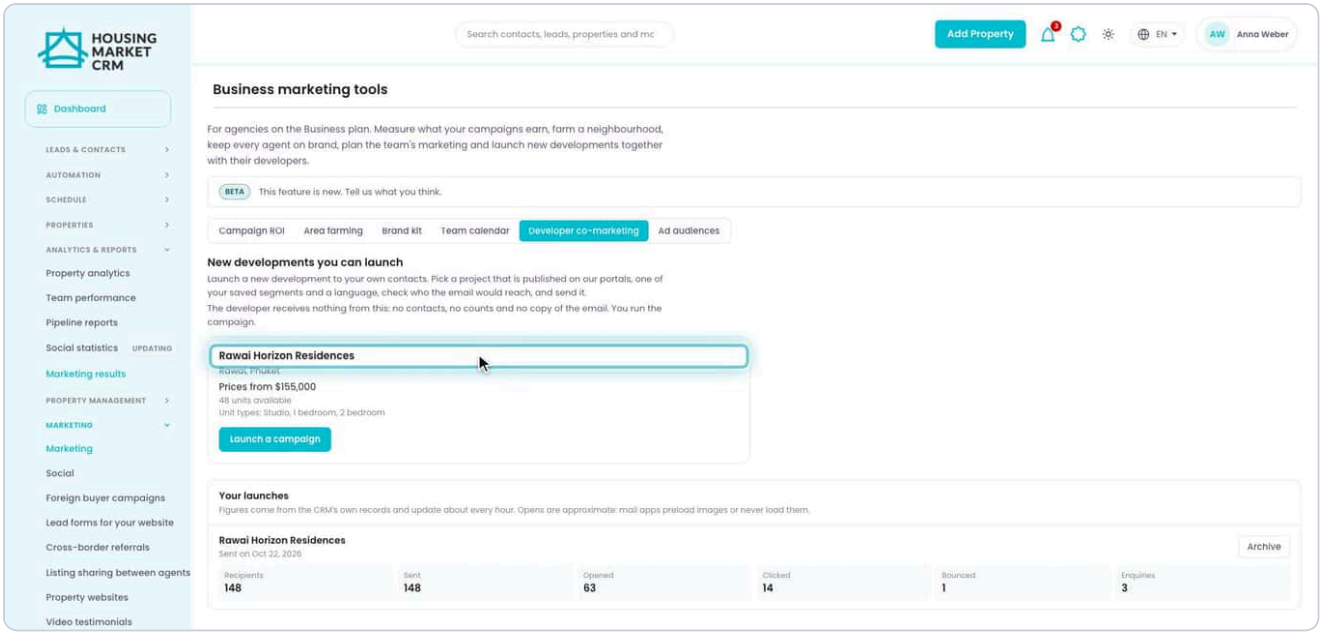


Figure 143.21 · Screen recorded 29 October 2026

22 The developer receives **no contacts and no counts**.

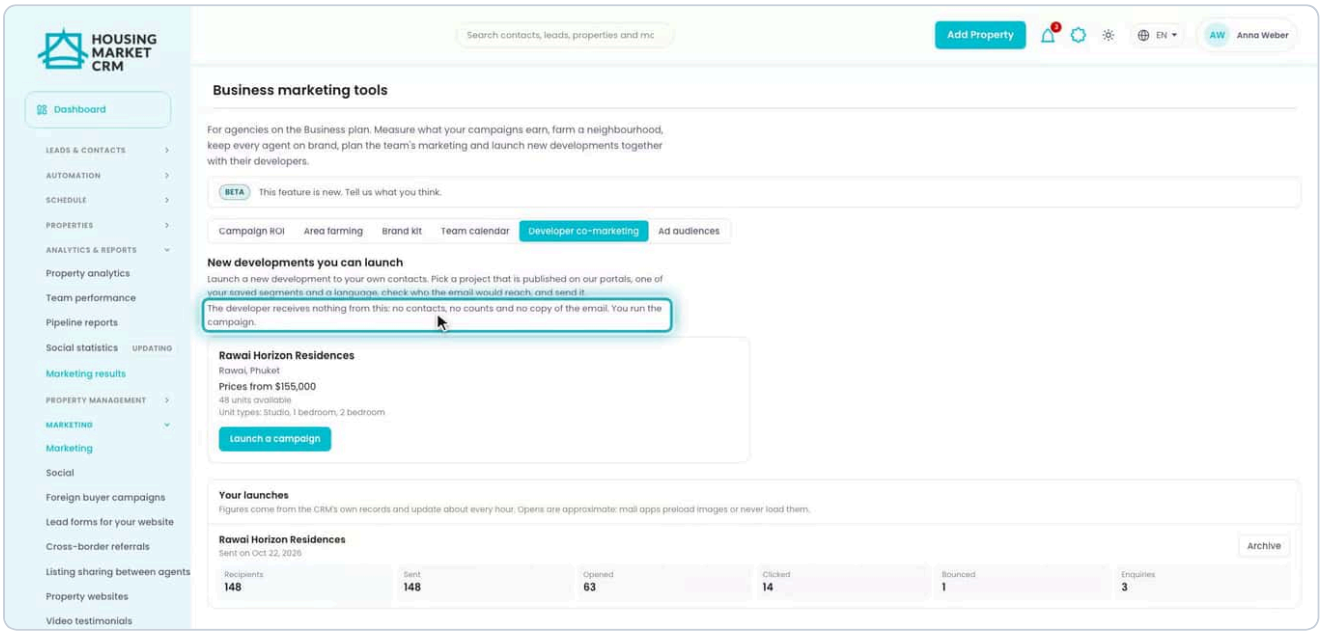


Figure 143.22 · Screen recorded 29 October 2026

23 Open **Ad audiences**.

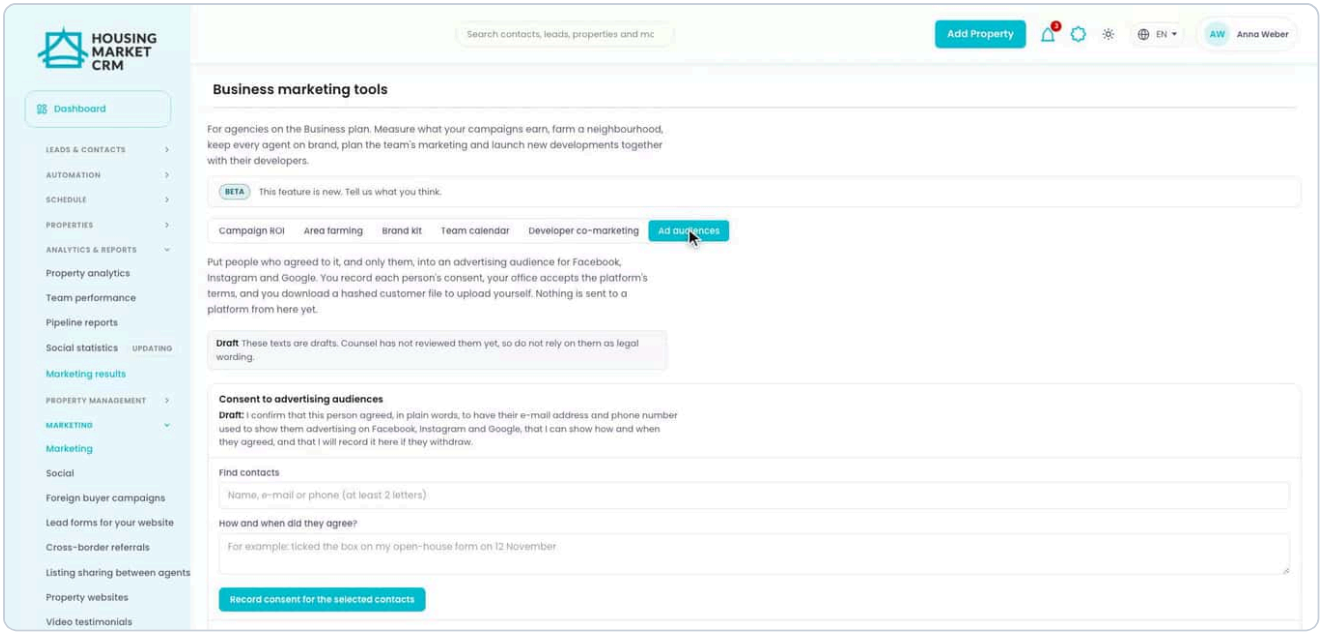


Figure 143.23 · Screen recorded 29 October 2026

24 Only people who **agreed** can go into an advertising audience.

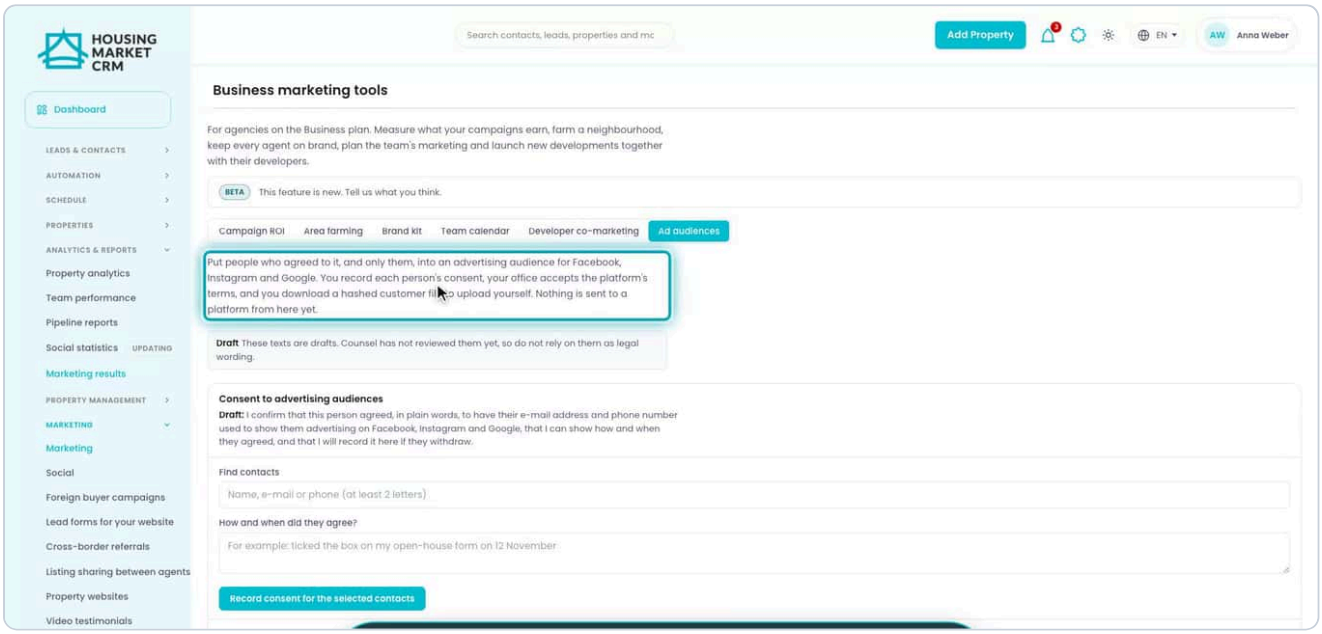


Figure 143.24 · Screen recorded 29 October 2026

25 You download a **hashed file** and upload it yourself.

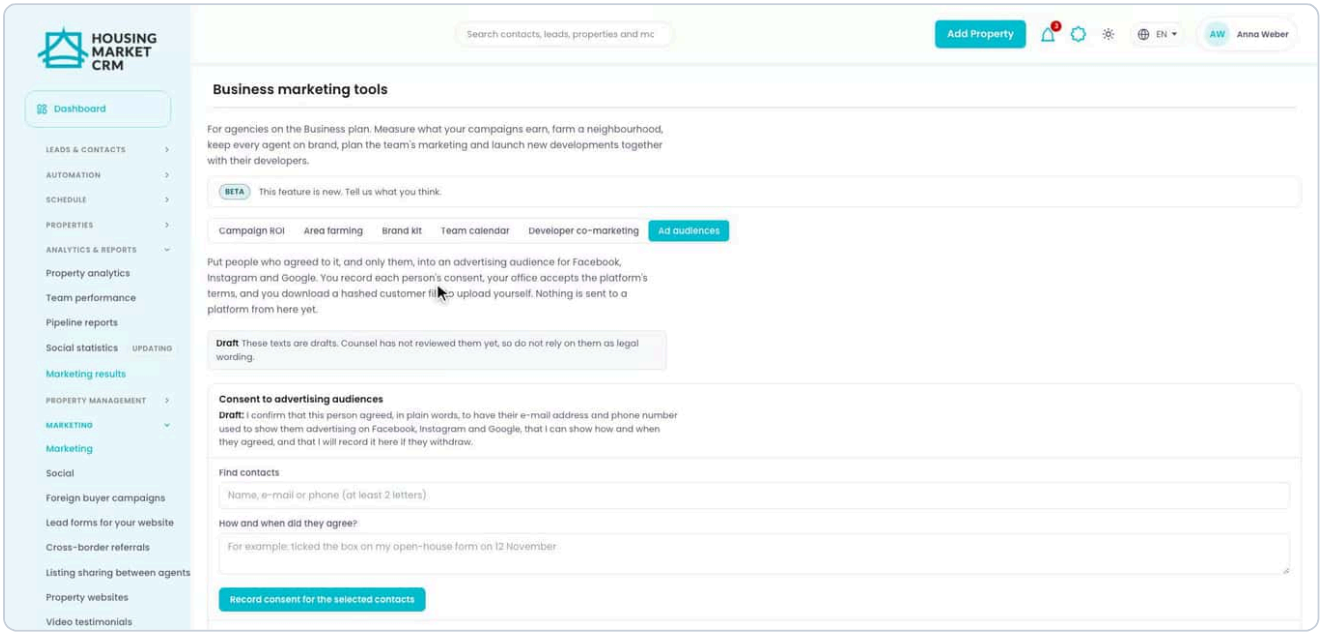


Figure 143.25 · Screen recorded 29 October 2026

144 CHAPTER 144

Send a cross-border referral

Pro and Business | For agents | Watch the video

OVERVIEW

Refer a client to an agent in another Housing Market country and keep track of the referral and the fee you agreed. No money moves through the CRM. It is part of the Pro plan.

Under Marketing, choose Cross-border referrals. To receive clients, join the referral network: choose the languages you can serve, add a line other agents read before they choose you, and switch on receiving referrals. Other agents then find you by name, company, market and language. Only agents in other markets who joined appear when you search.

To refer a client, choose an agent, give the client a short label, the client's name and email and what the client wants, and tick that the client agreed to be introduced. Do not put contact details in the description. The other agent sees the label and the description first. The client's name, email and phone reach her only if she accepts. If she declines, you withdraw or nobody answers in time, they are erased.

You can record a fee you agreed: none, a percentage of her commission or a flat amount. Housing Market only records it. You settle the fee between yourselves and mark it as paid, received or waived here. The agent who receives a referral may use the details only to contact the client about it, and may not add them to marketing lists or pass them on unless the client agrees separately.

Each referral shows its status: Waiting for an answer, Accepted, Declined, Withdrawn, Expired, Closed with a deal or Closed without a deal, and keeps a history. The record is kept for the number of months the screen states, so both agents can see the outcome, and after that the client's personal details are erased from it.

From the Help Center: **How do cross-border referrals work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

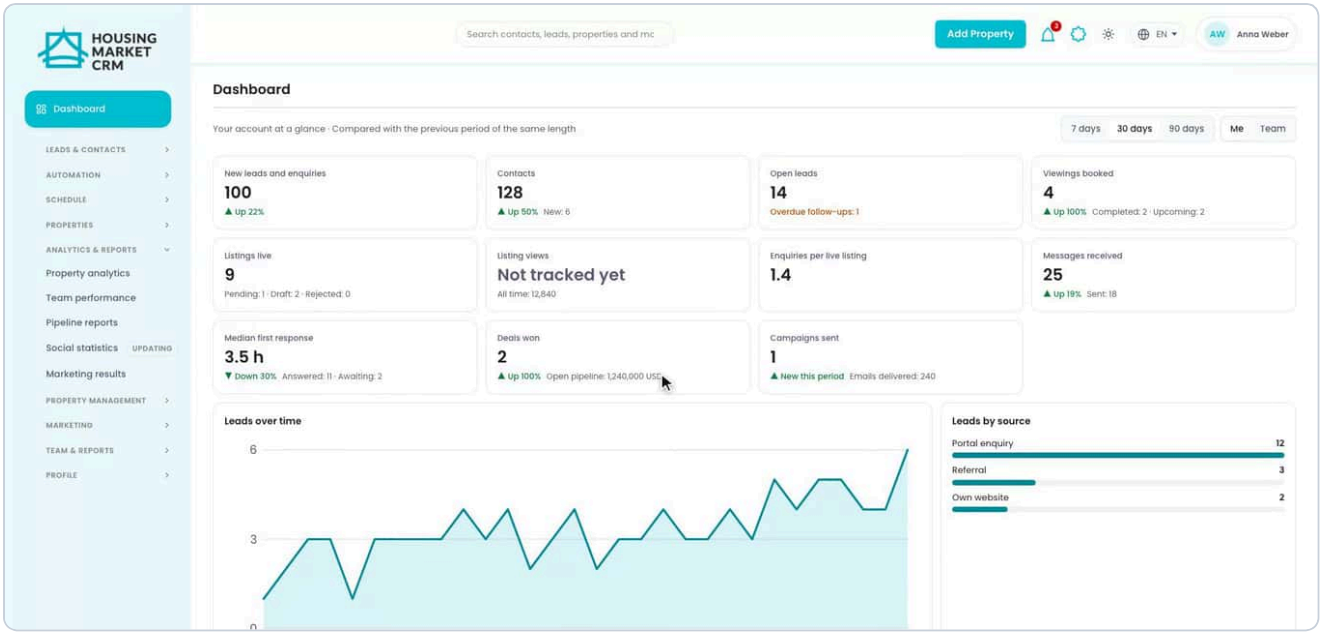


Figure 144.1 · Screen recorded 29 October 2026

2 Open the **Marketing** group in the left menu.

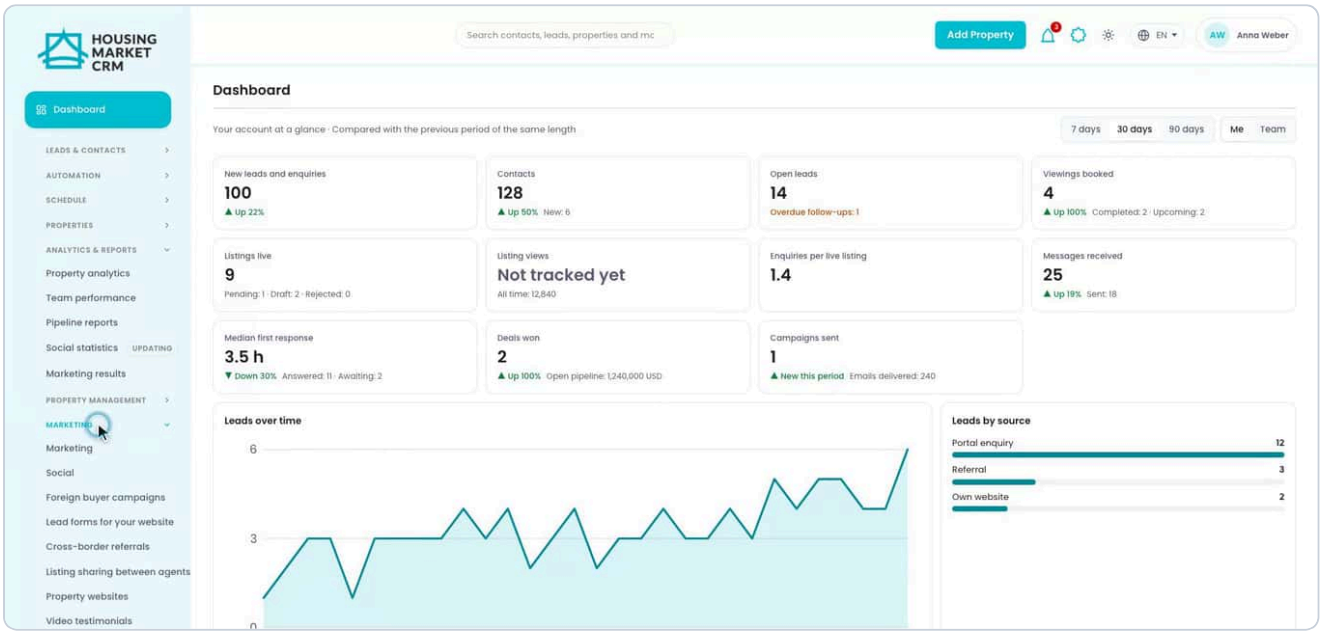


Figure 144.2 · Screen recorded 29 October 2026

3 Click **Cross-border referrals**.

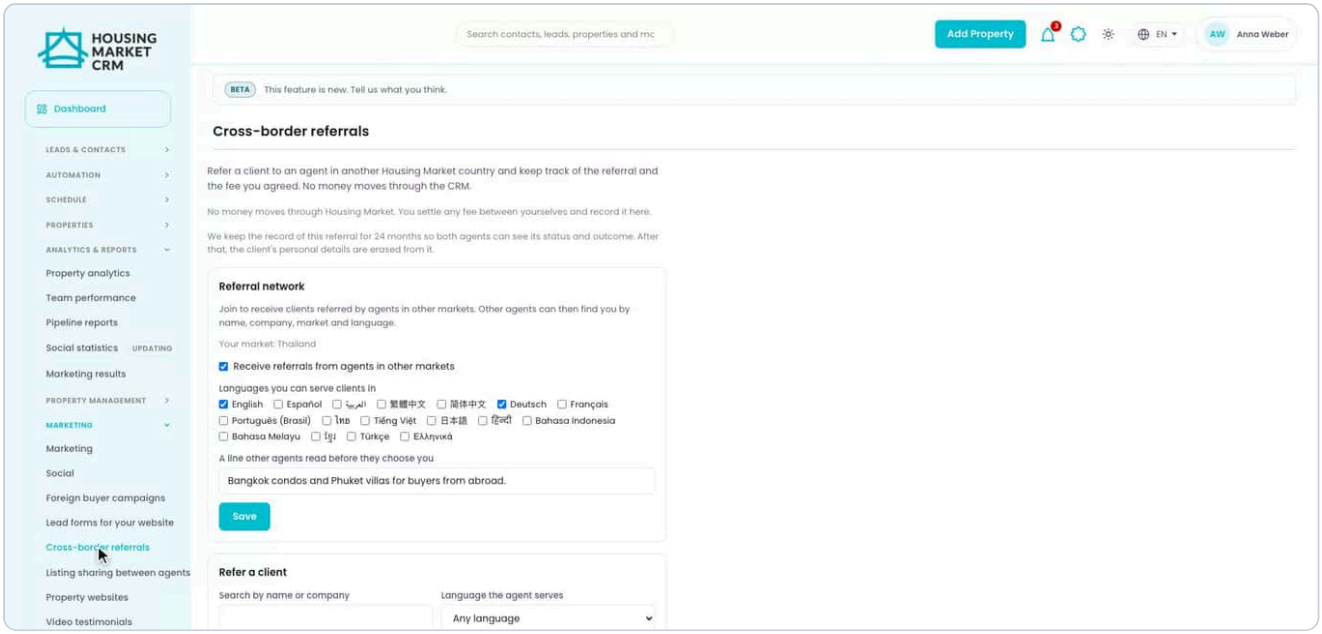


Figure 144.3 · Screen recorded 29 October 2026

4 This feature is new and shows a **Beta** badge while we refine it.

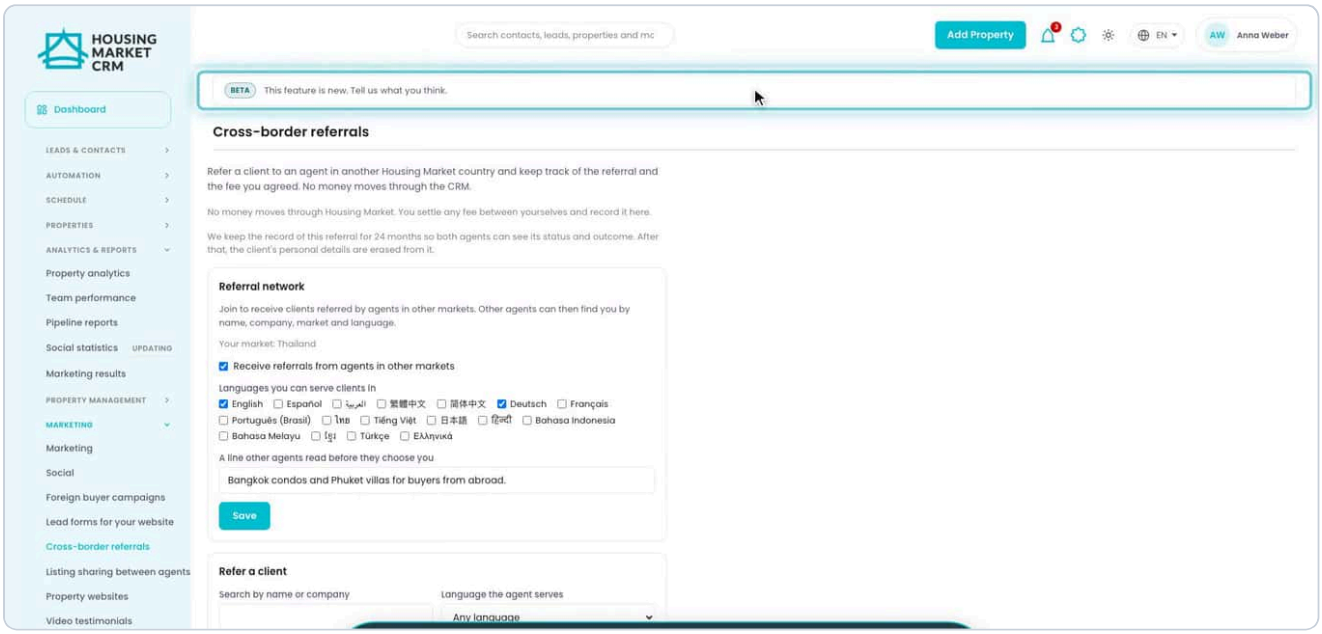


Figure 144.4 · Screen recorded 29 October 2026

5 **No money moves** through the CRM. The fee is only recorded.

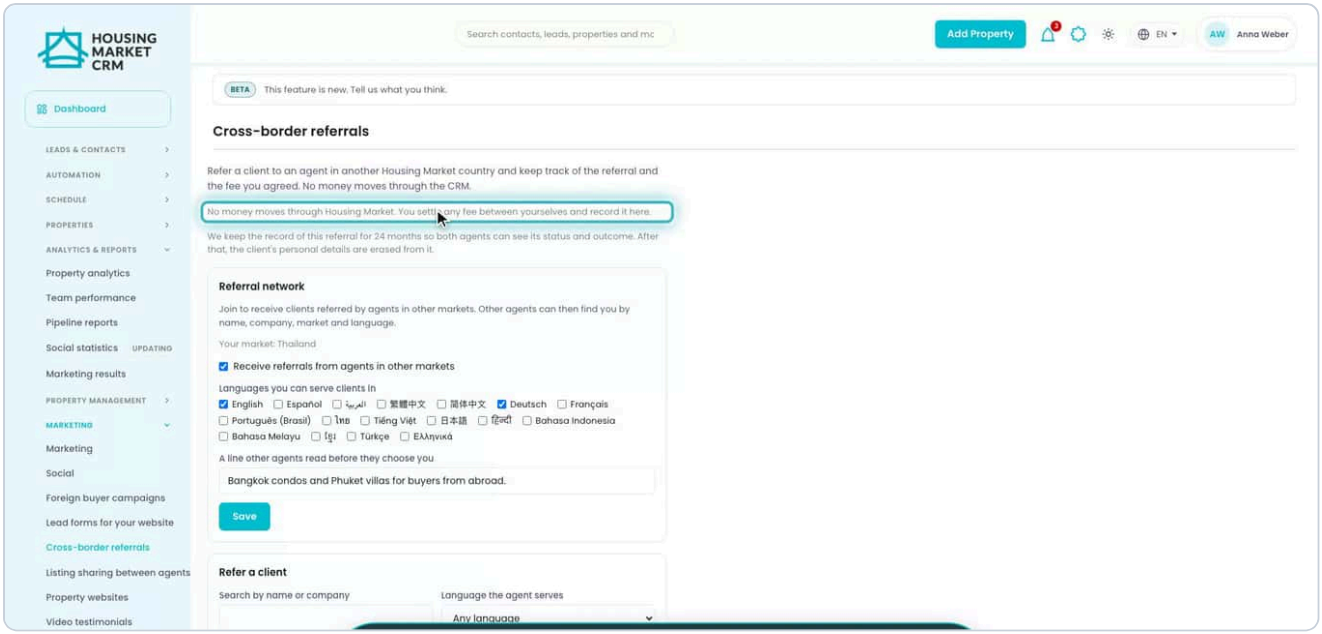


Figure 144.5 · Screen recorded 29 October 2026

6 Join the **referral network** so agents abroad can find you.

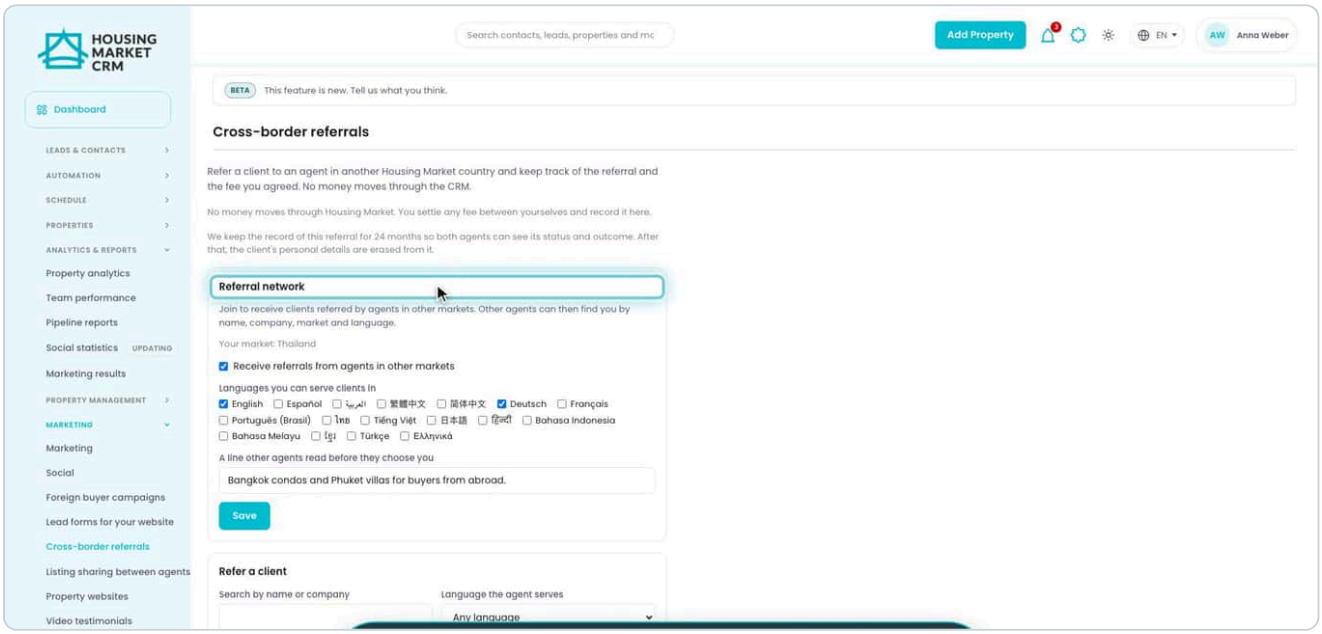


Figure 144.6 · Screen recorded 29 October 2026

7 Tick this to **receive** referrals too.

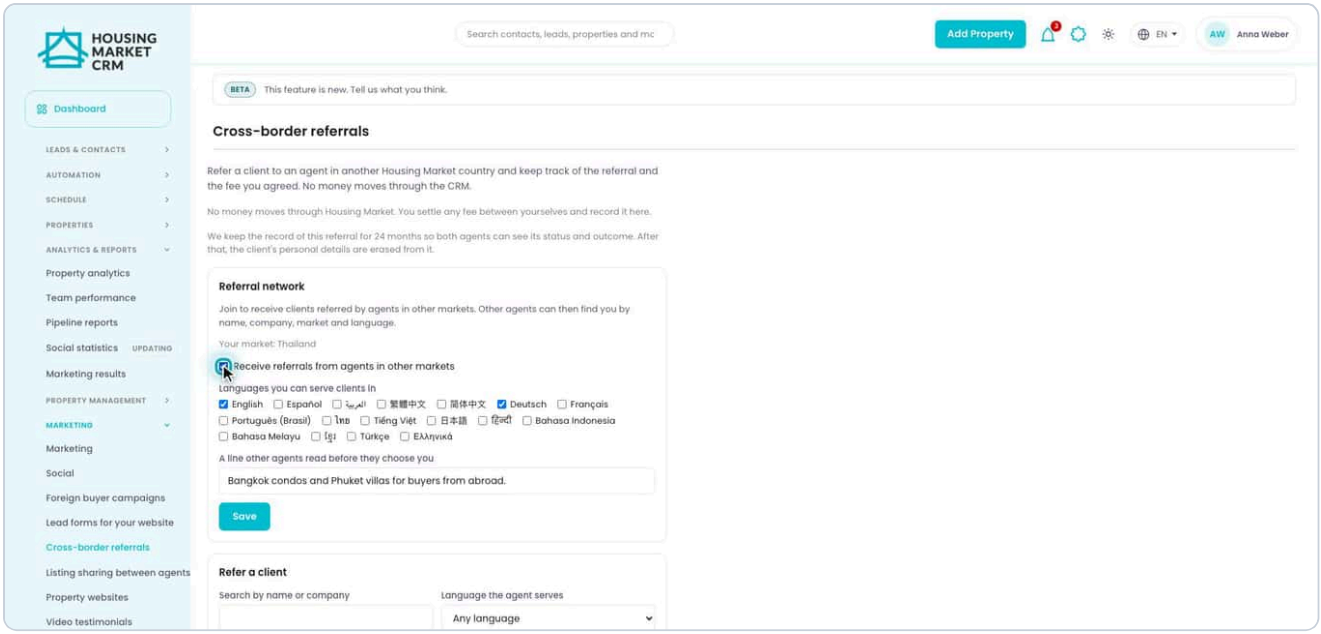


Figure 144.7 · Screen recorded 29 October 2026

8 Choose the **language** the agent serves.

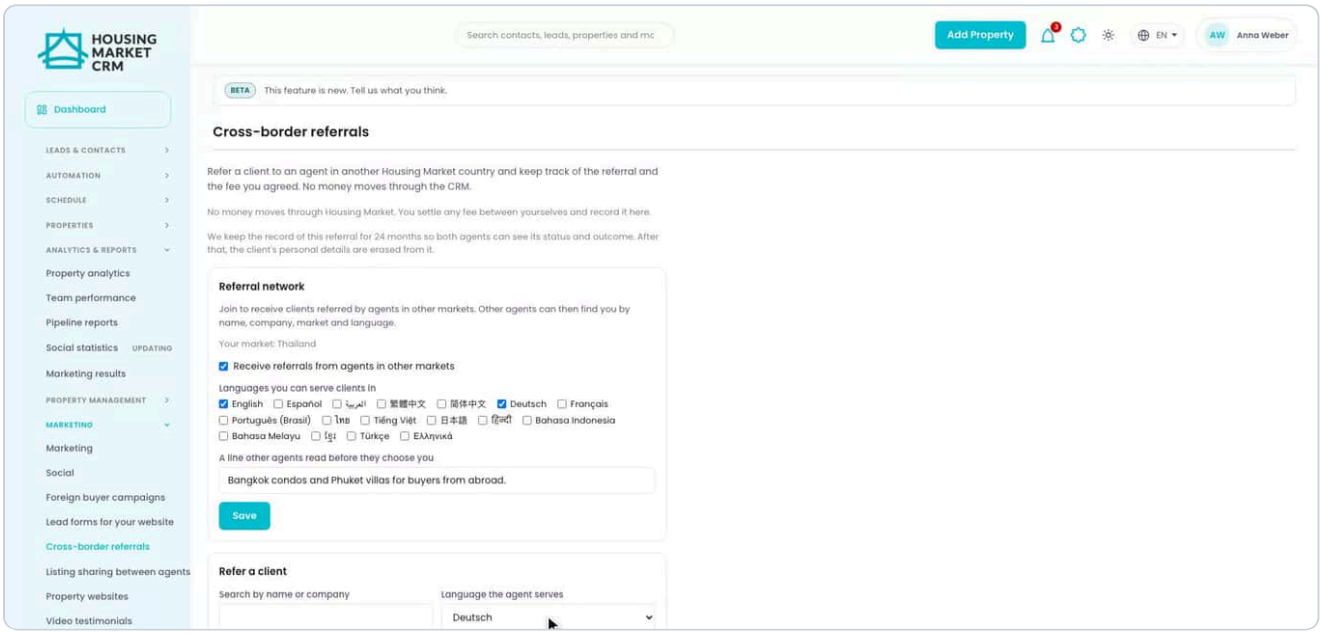


Figure 144.8 · Screen recorded 29 October 2026

9 Only agents in **other markets** who joined are listed.

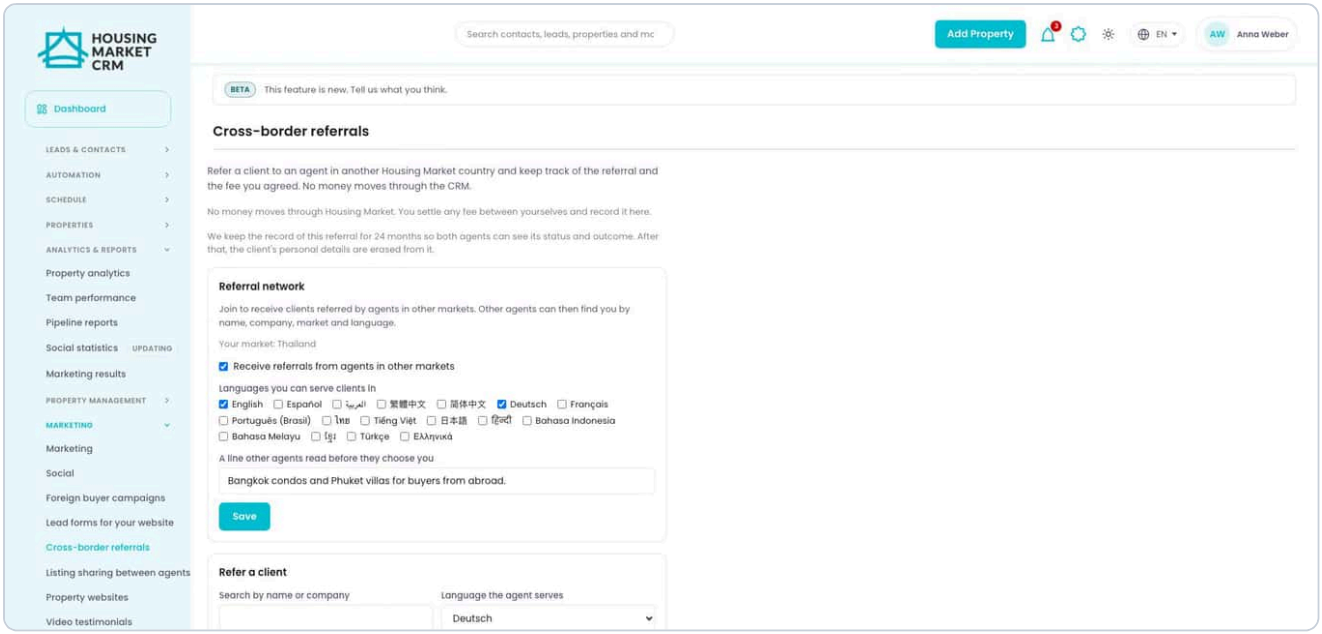


Figure 144.9 · Screen recorded 29 October 2026

10 Click **Choose**.

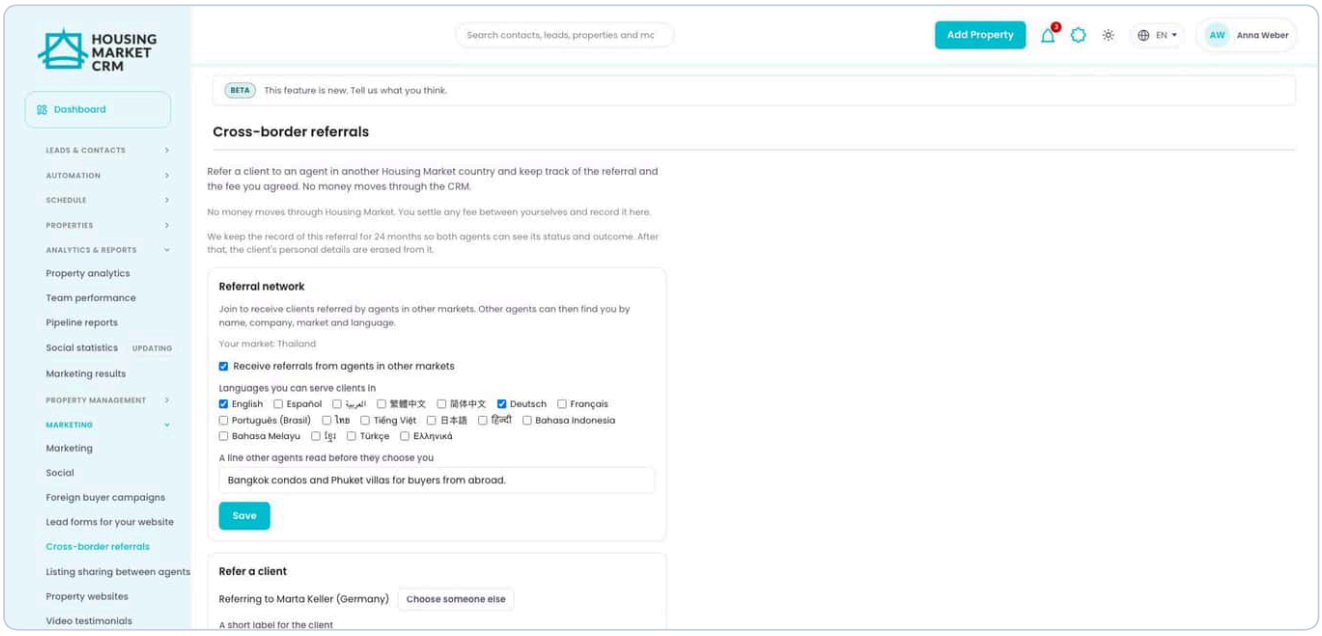


Figure 144.10 · Screen recorded 29 October 2026

11 Add a **short label**. The other agent sees it first.

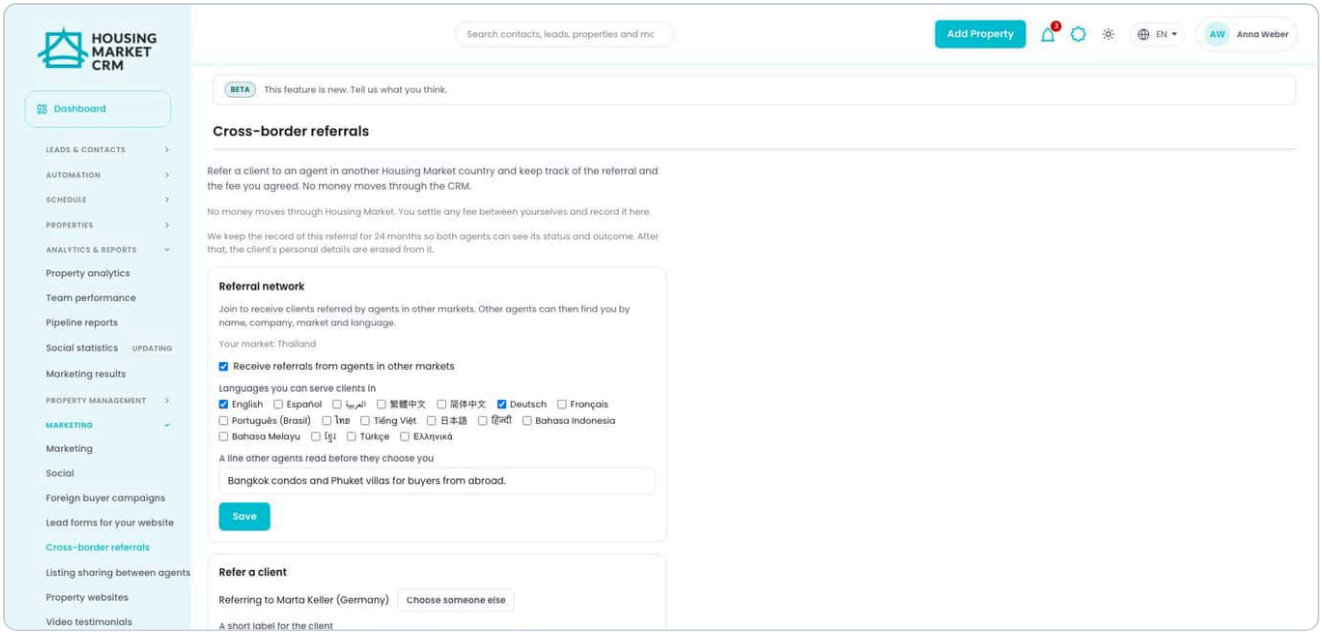


Figure 144.11 · Screen recorded 29 October 2026

12 Say what the client **wants**, without contact details.

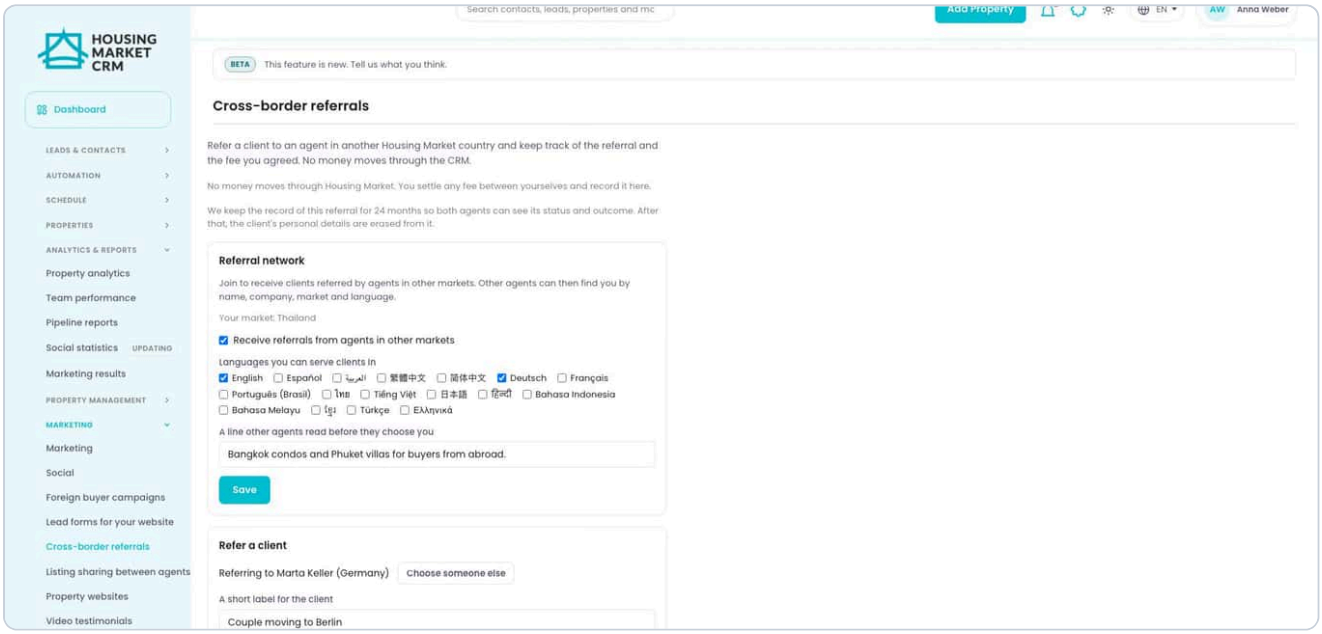


Figure 144.12 · Screen recorded 29 October 2026

13 Enter the client's **name** and **email**.

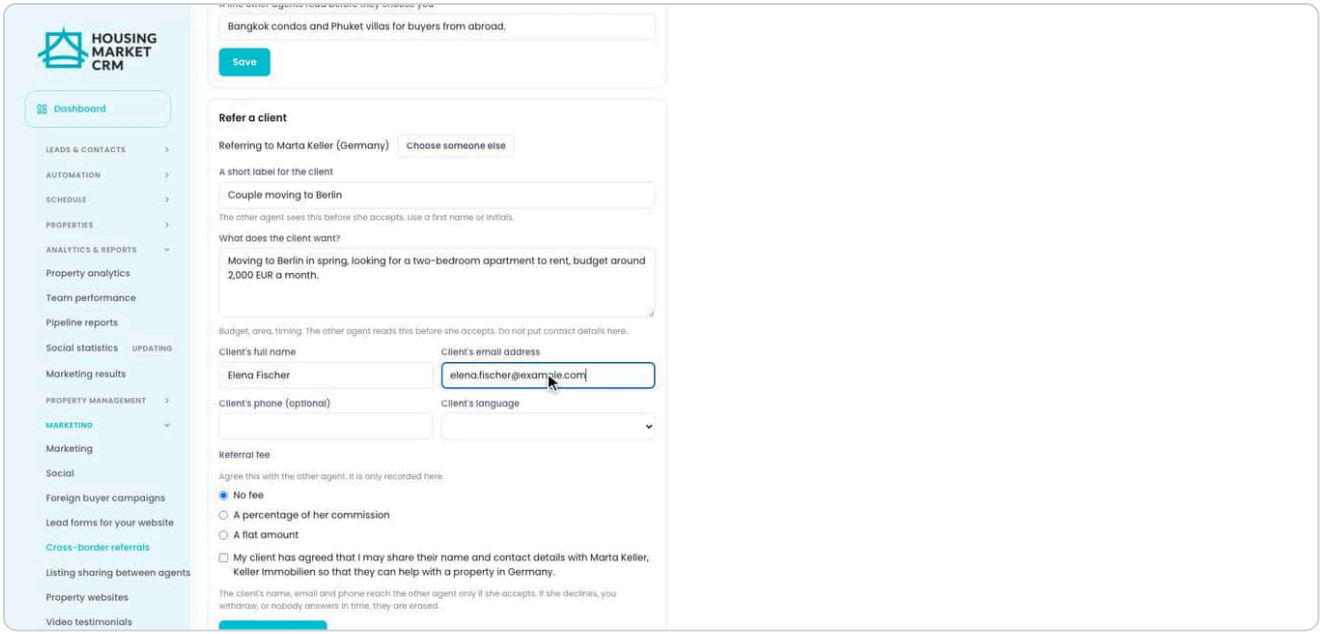


Figure 144.13 · Screen recorded 29 October 2026

14 Choose the client's **language**.

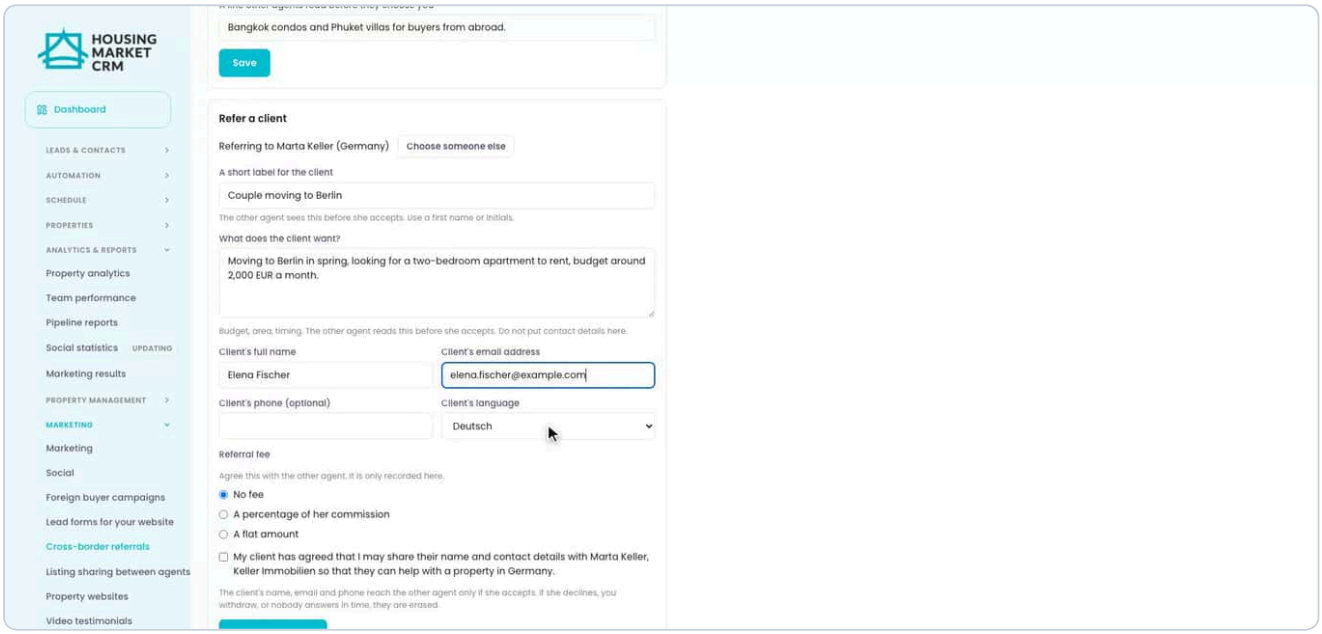


Figure 144.14 · Screen recorded 29 October 2026

15 Record the **fee** you agreed with the other agent.

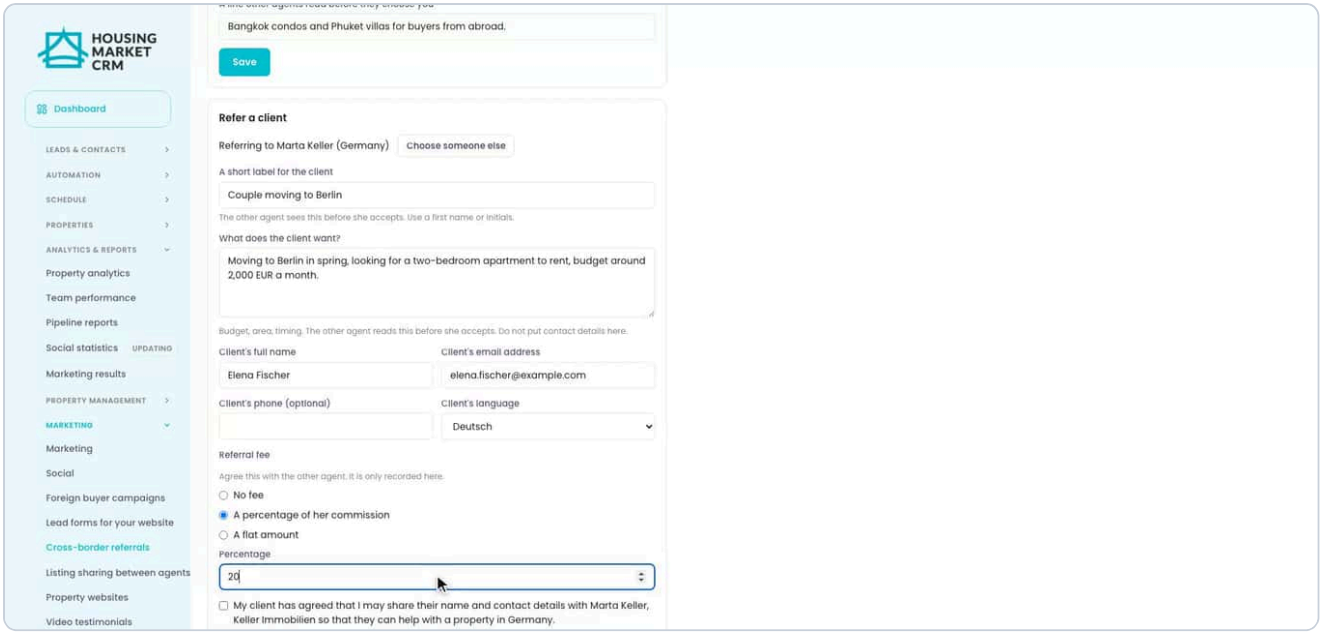


Figure 144.15 · Screen recorded 29 October 2026

16 Confirm that your client **agreed** to be introduced.

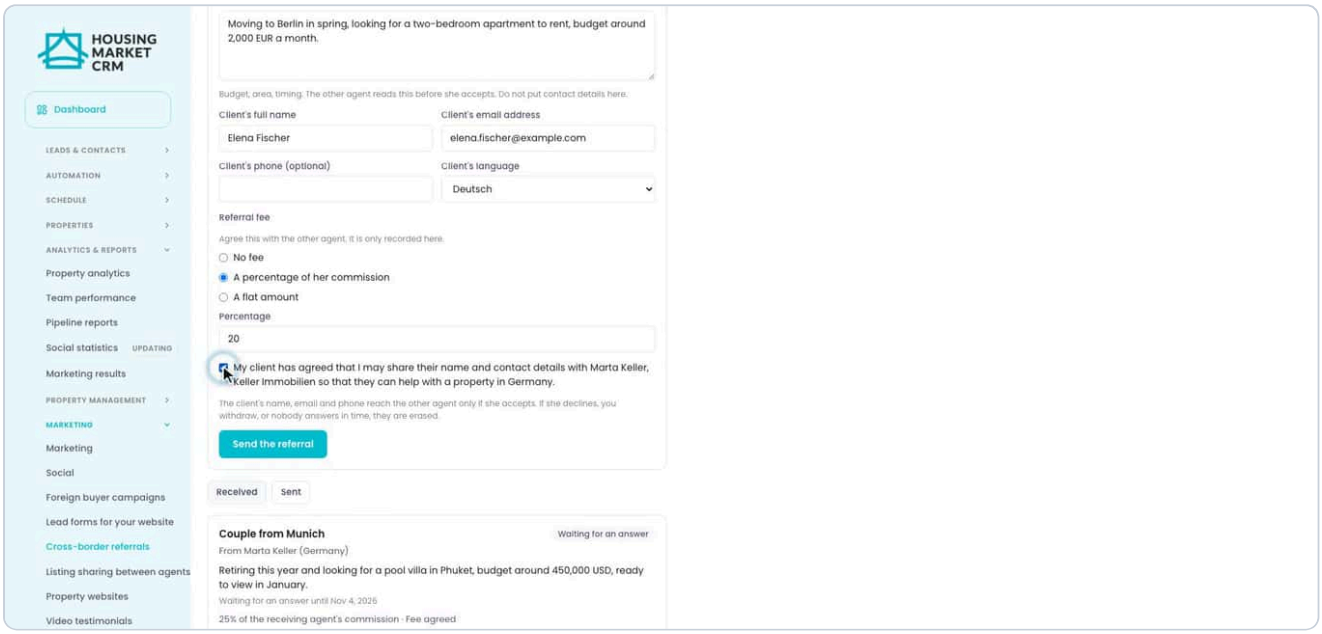


Figure 144.16 · Screen recorded 29 October 2026

17 Their details reach her **only if she accepts**.

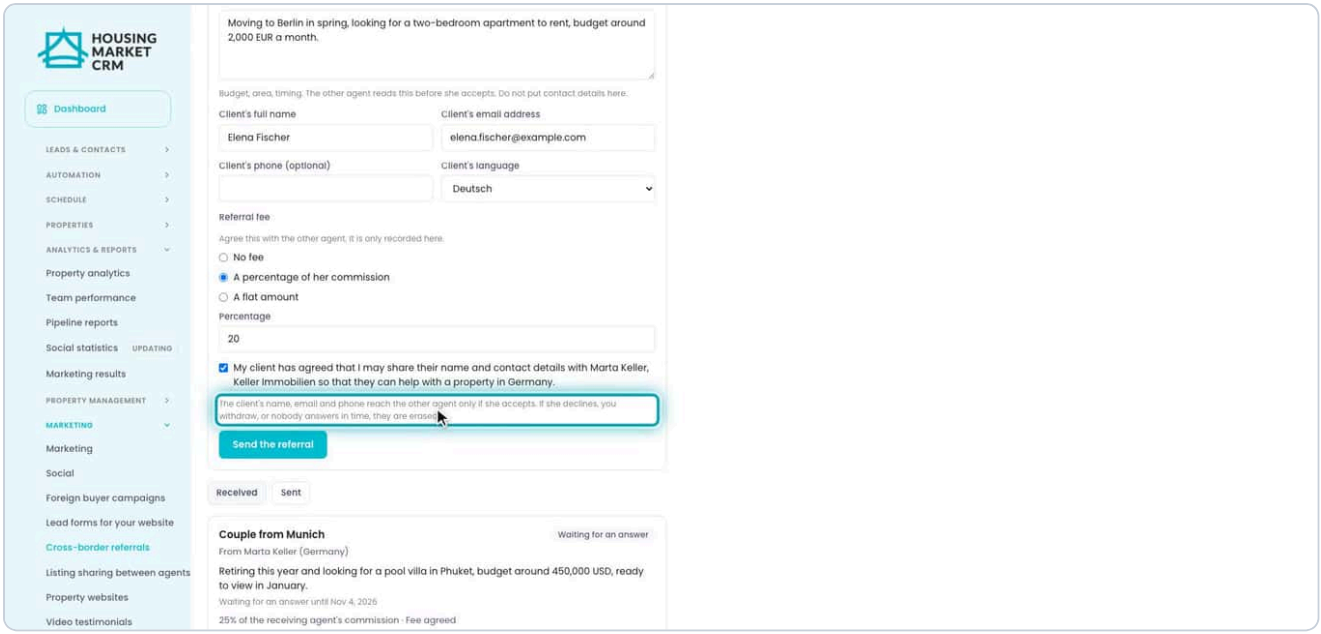


Figure 144.17 · Screen recorded 29 October 2026

18 Click **Send the referral**.

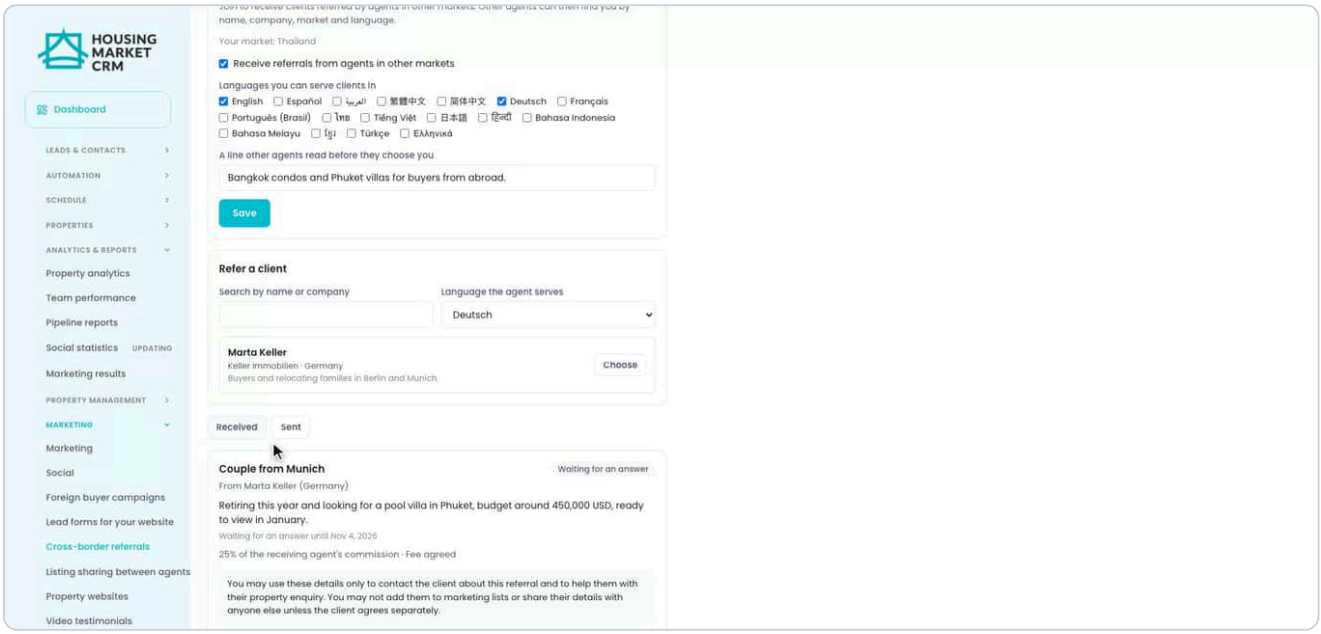


Figure 144.18 · Screen recorded 29 October 2026

19 Open the **Sent** tab.

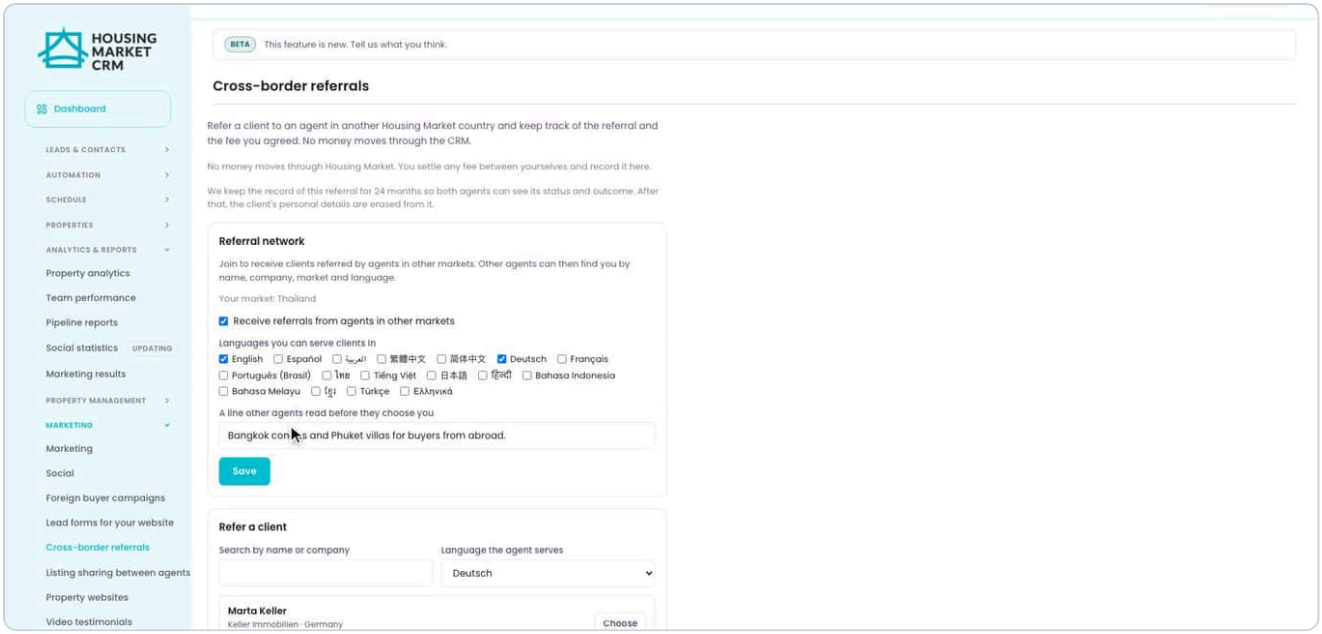


Figure 144.19 · Screen recorded 29 October 2026

20 Your referral **waits for an answer**.

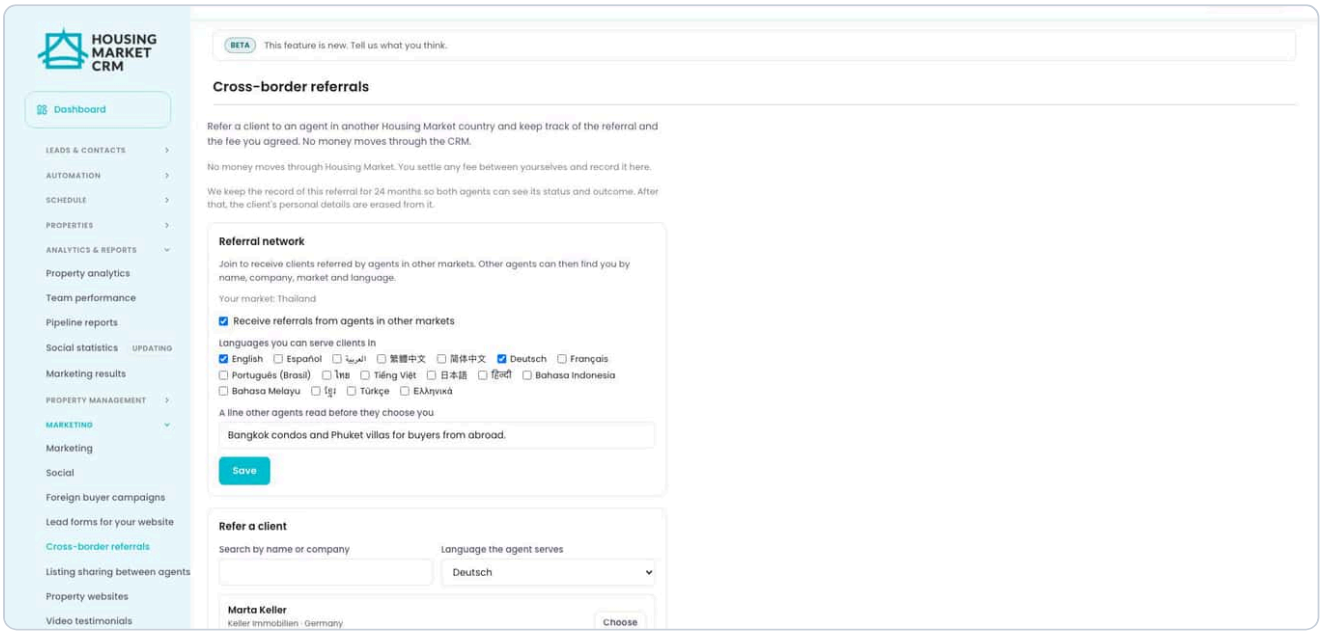


Figure 144.20 · Screen recorded 29 October 2026

21 Referrals sent to you are under **Received**.

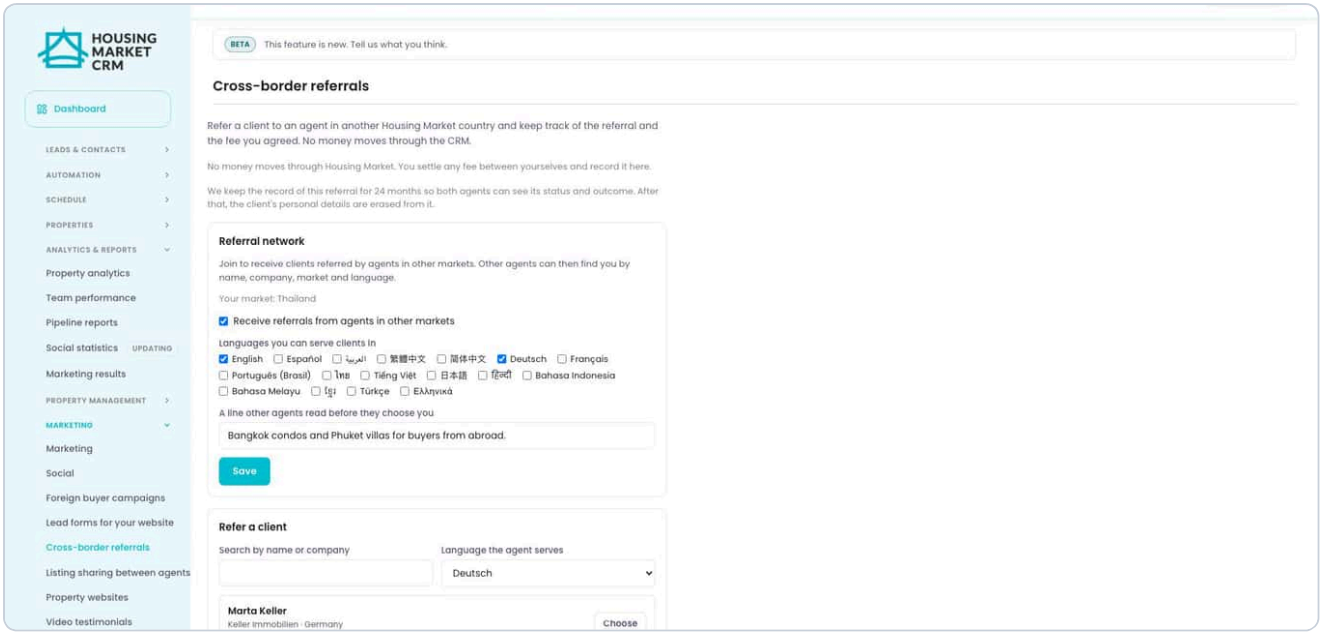


Figure 144.21 · Screen recorded 29 October 2026

22 You may use the details **only** for that referral.

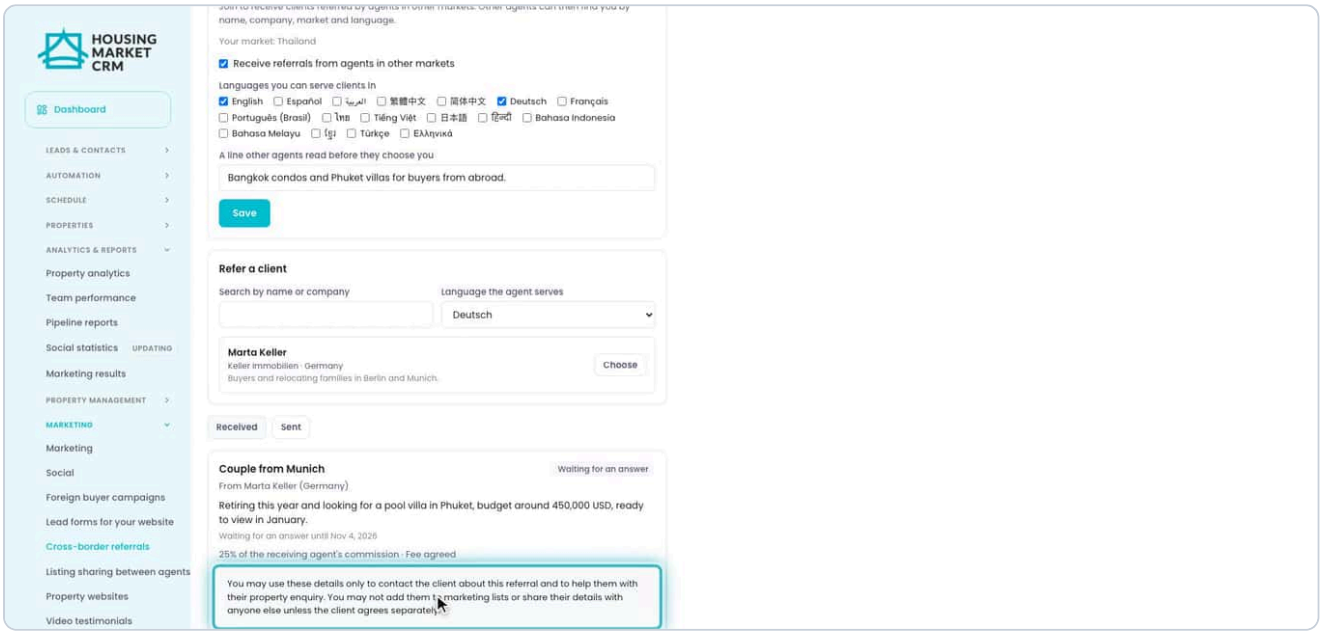


Figure 144.22 · Screen recorded 29 October 2026

23 Then **Accept** or **Decline**.

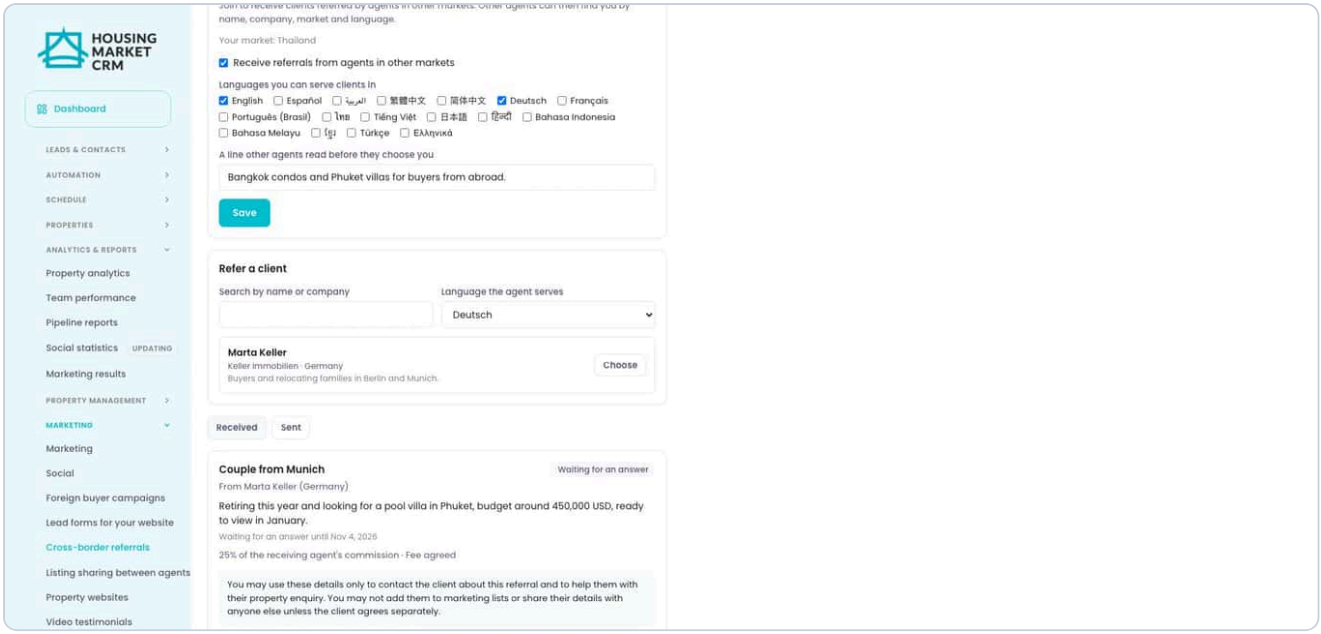


Figure 144.23 · Screen recorded 29 October 2026

145 CHAPTER 145

Run a foreign buyer campaign

Pro and Business | For agents | Watch the video

OVERVIEW

Promote a live listing to Housing Market shoppers in another country, in their own language, once the Housing Market team has approved it. You never see the shopper list. It is part of the Pro plan.

Under Marketing, choose Foreign buyer campaigns and then New campaign. Choose one of your live portal listings, search for the country the shoppers are from and choose the language of the email. The language is set from the country's most common language, and you can change it. Choose Check the audience to see how many matching shoppers there are. A campaign needs at least the number the screen states, and below that you are told there are too few.

Choose Write the draft. The writing assistant writes the subject and the message in the shoppers' language from your listing. You may add notes it should say, and it restates them without adding anything. Read the draft, edit it, preview the email and then choose Send for review. While it is waiting for review you can take it back.

The Housing Market team reviews every campaign. An approved campaign is emailed on your behalf to shoppers who asked to receive property offers and whose profile shows the country you chose. The country is the one in the shopper's profile, not their nationality and not where they are browsing from. No personal details are shared with you. You receive only the enquiries that shoppers choose to send.

Each campaign shows its status, from Draft and Sent for review to Waiting for review, Approved, Sending and Sent, with the audience, how many were sent and how many were delivered. The campaign is not charged.

From the Help Center: **How do foreign buyer campaigns work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

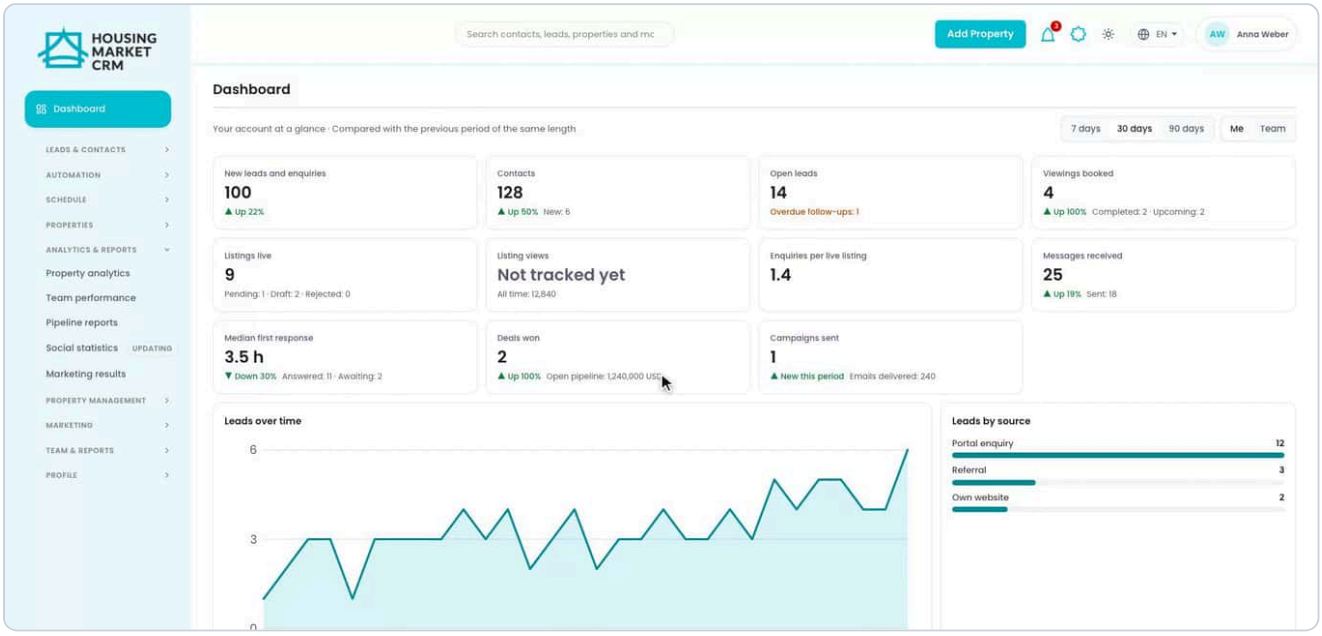


Figure 145.1 · Screen recorded 29 October 2026

2 Open the **Marketing** group in the left menu.

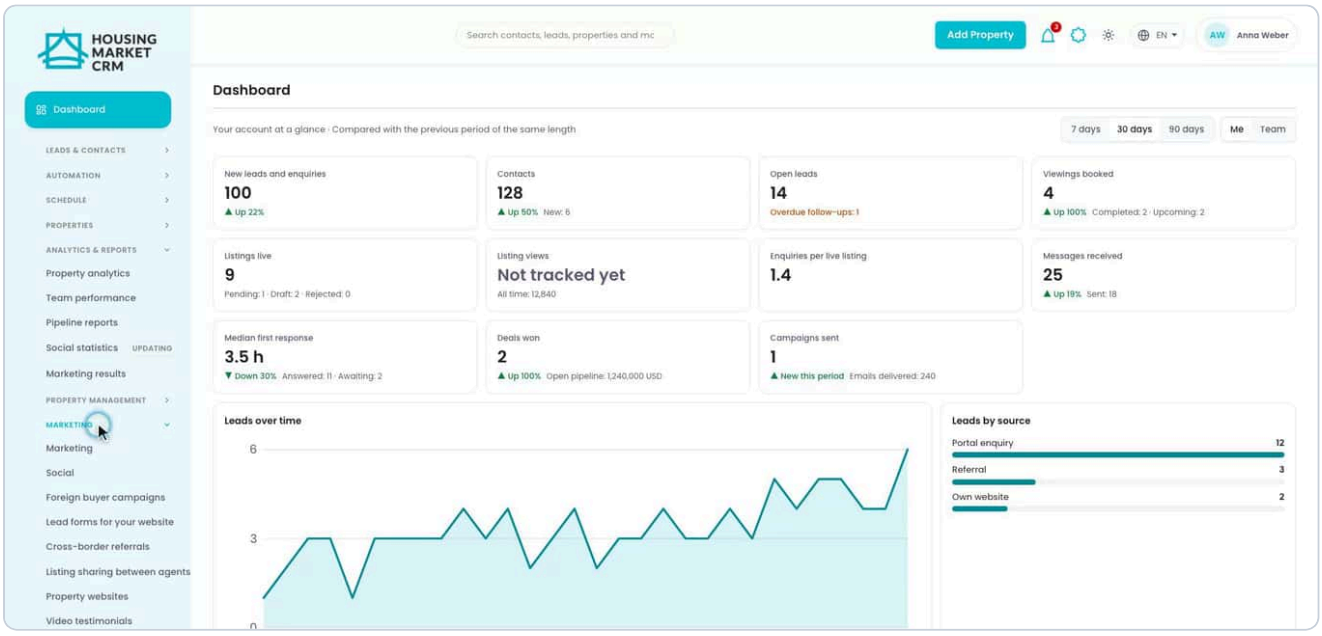


Figure 145.2 · Screen recorded 29 October 2026

3 Click **Foreign buyer campaigns**.

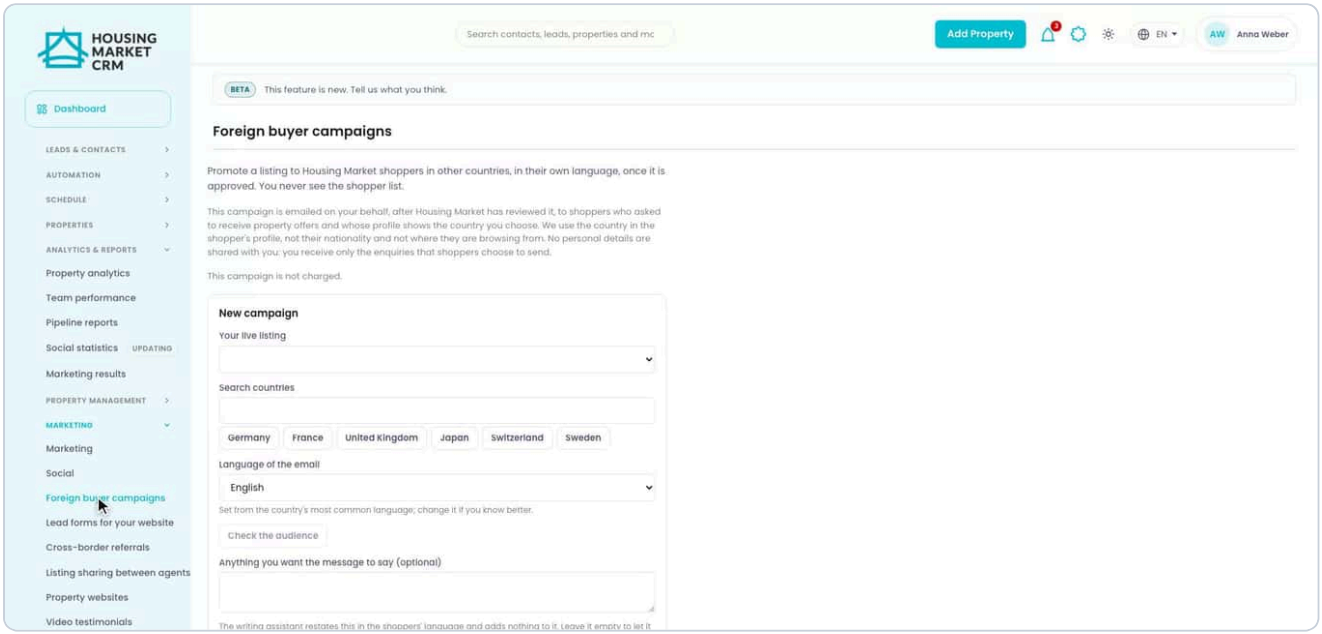


Figure 145.3 · Screen recorded 29 October 2026

4 This feature is new and shows a **Beta** badge while we refine it.

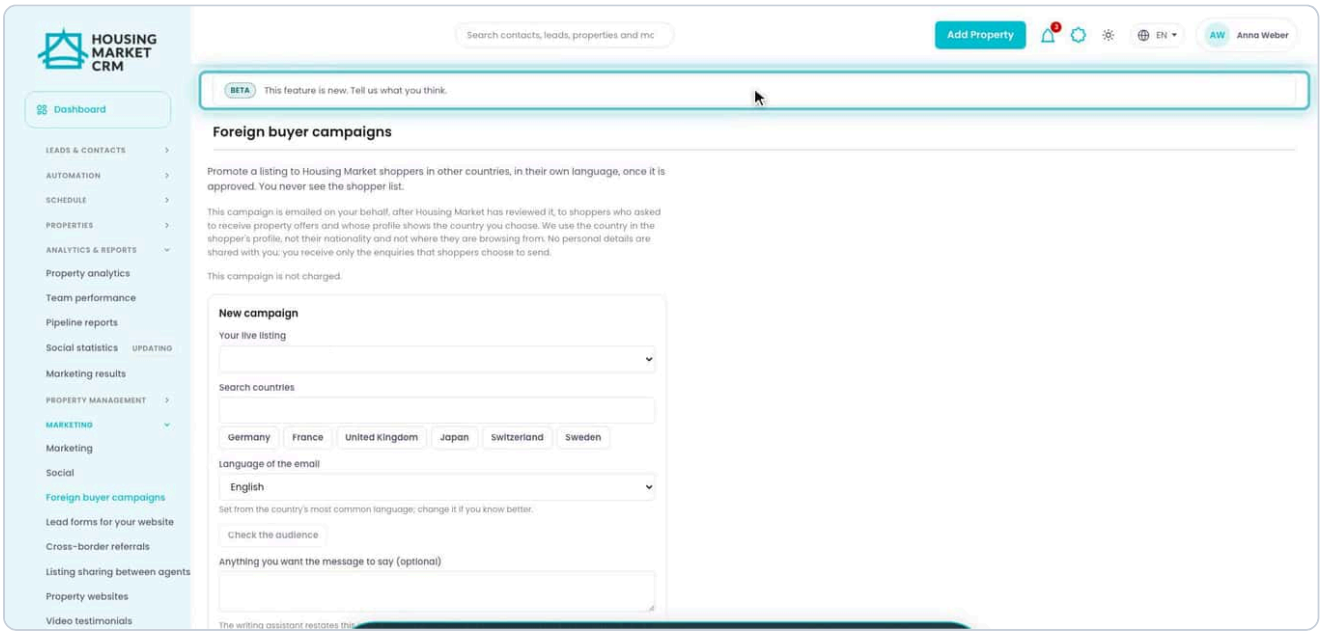


Figure 145.4 · Screen recorded 29 October 2026

5 You **never see** the shopper list.

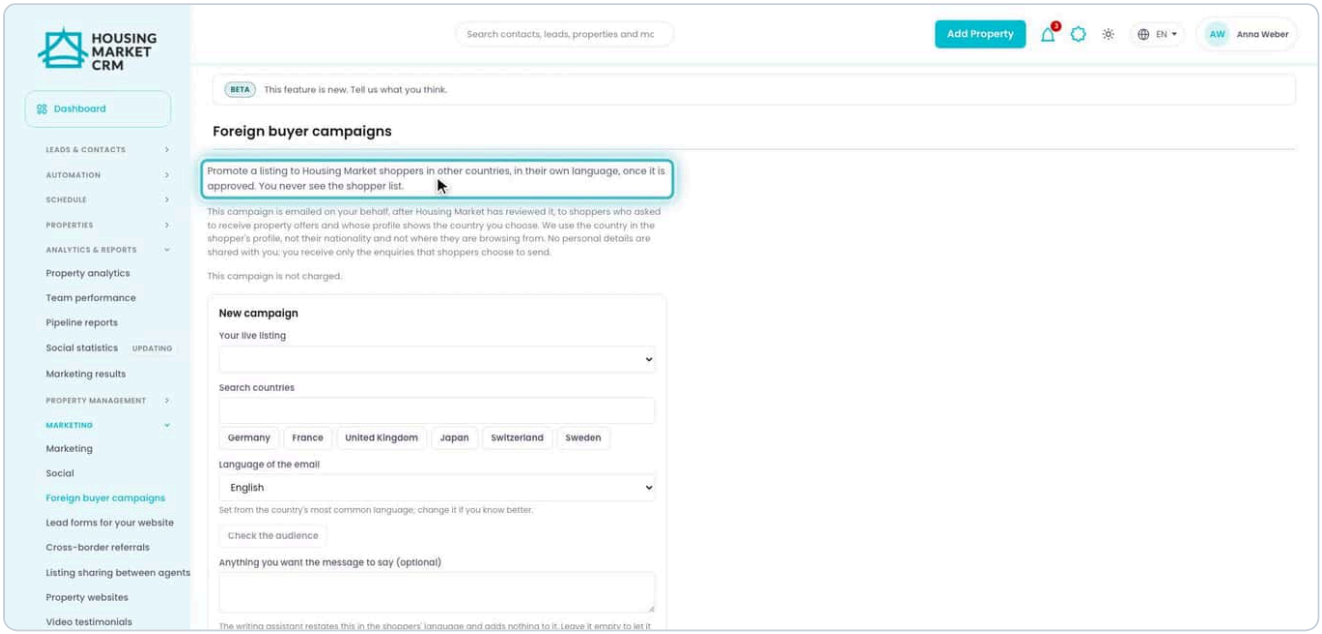


Figure 145.5 · Screen recorded 29 October 2026

6 The campaign is **not charged**.

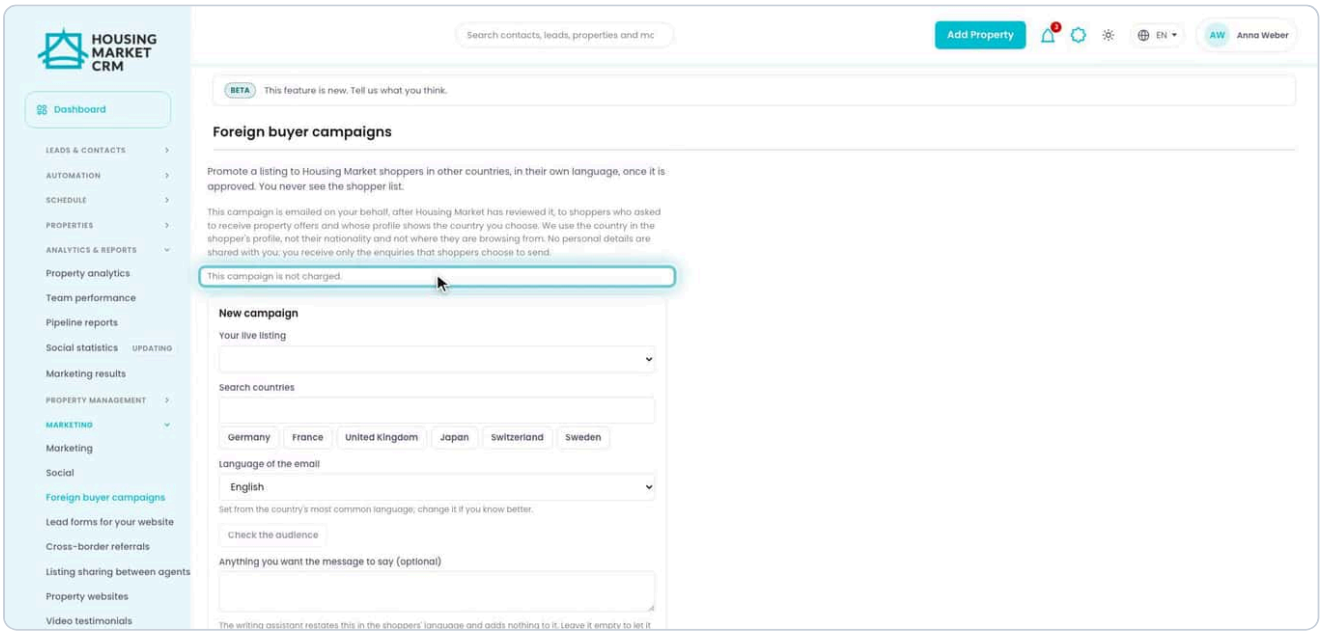


Figure 145.6 · Screen recorded 29 October 2026

7 Choose one of your **live listings**.

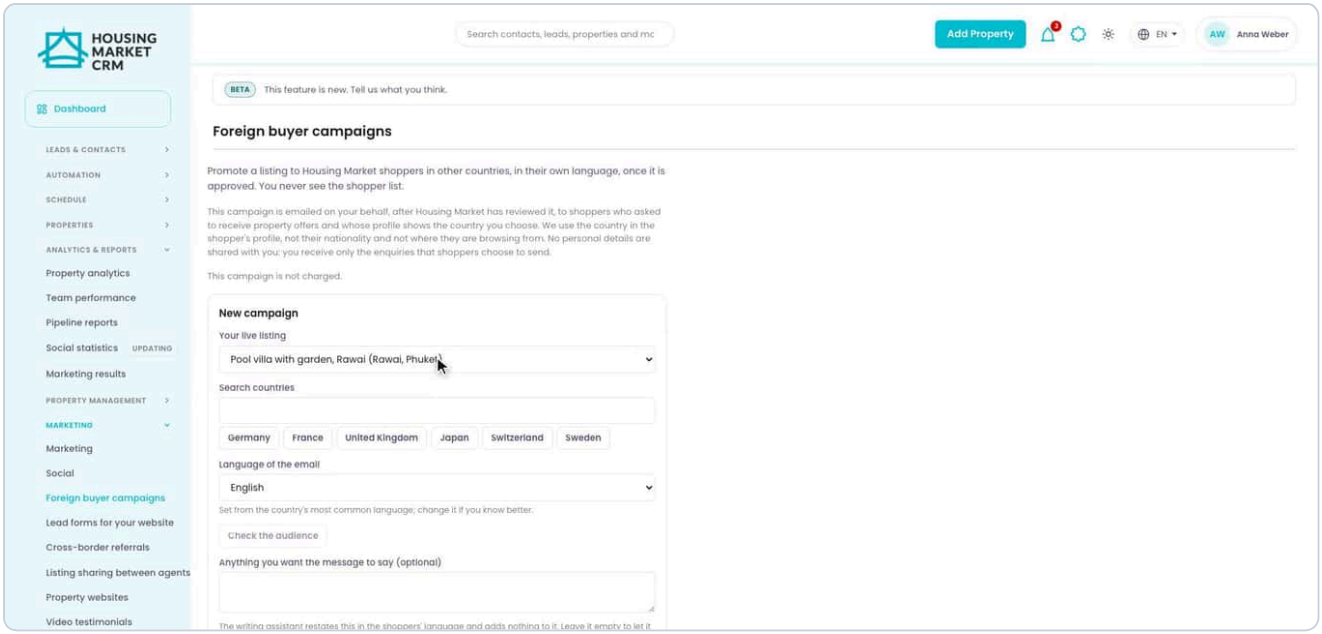


Figure 145.7 · Screen recorded 29 October 2026

8 Search for the **country** the shoppers are from.

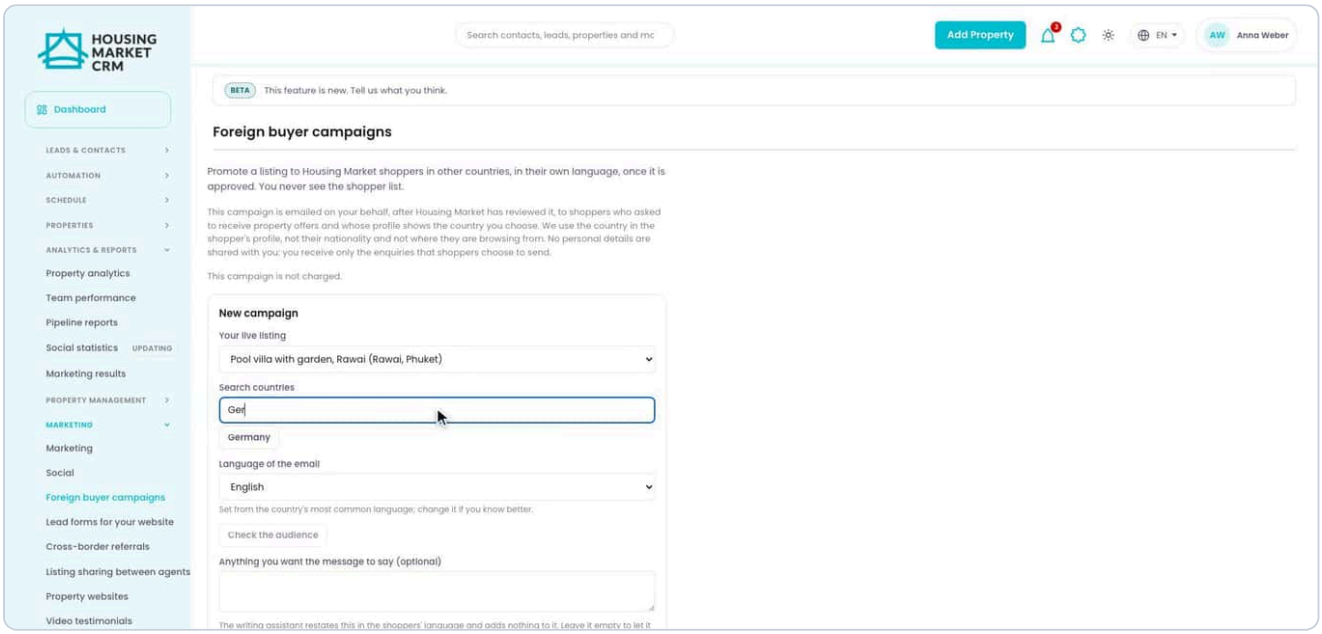


Figure 145.8 · Screen recorded 29 October 2026

9 Click **Germany**.

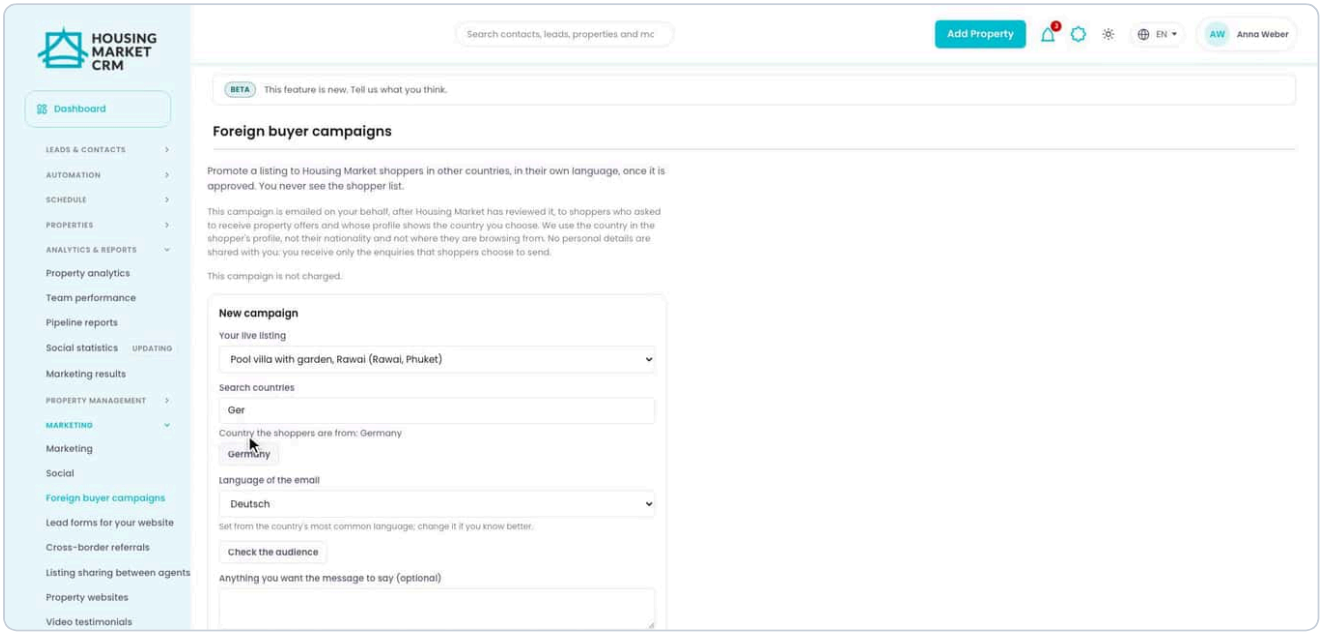


Figure 145.9 · Screen recorded 29 October 2026

10 The email **language** follows the country.

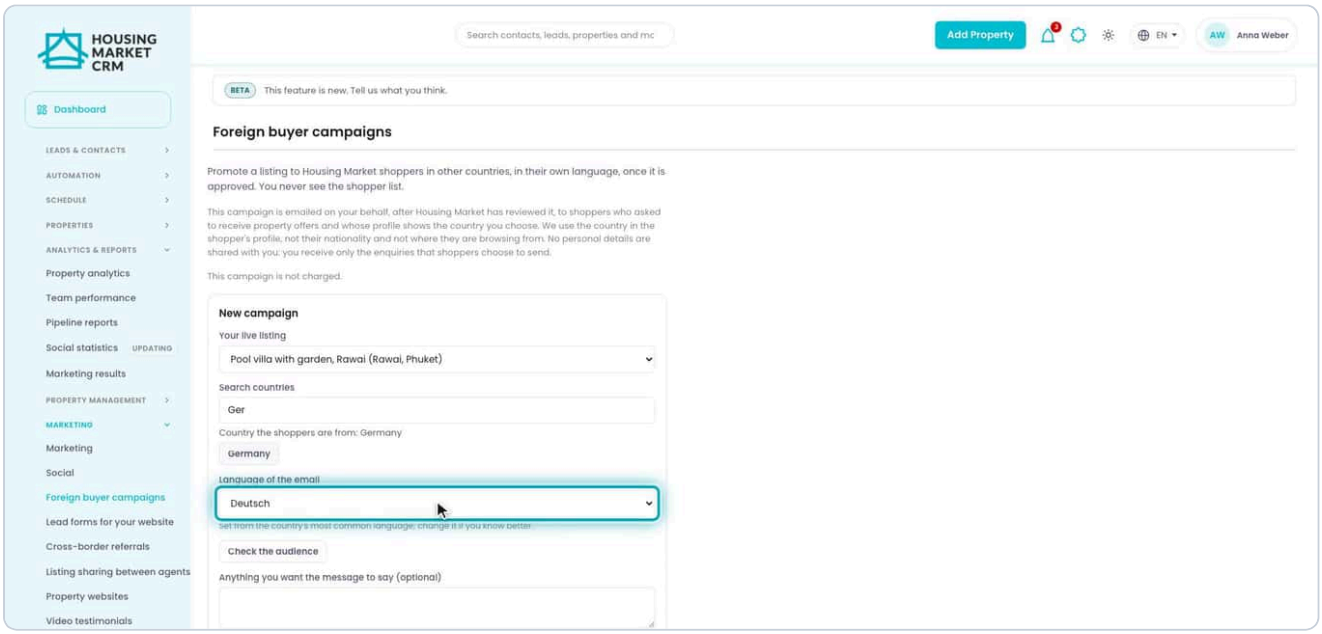


Figure 145.10 · Screen recorded 29 October 2026

11 Click **Check the audience**.

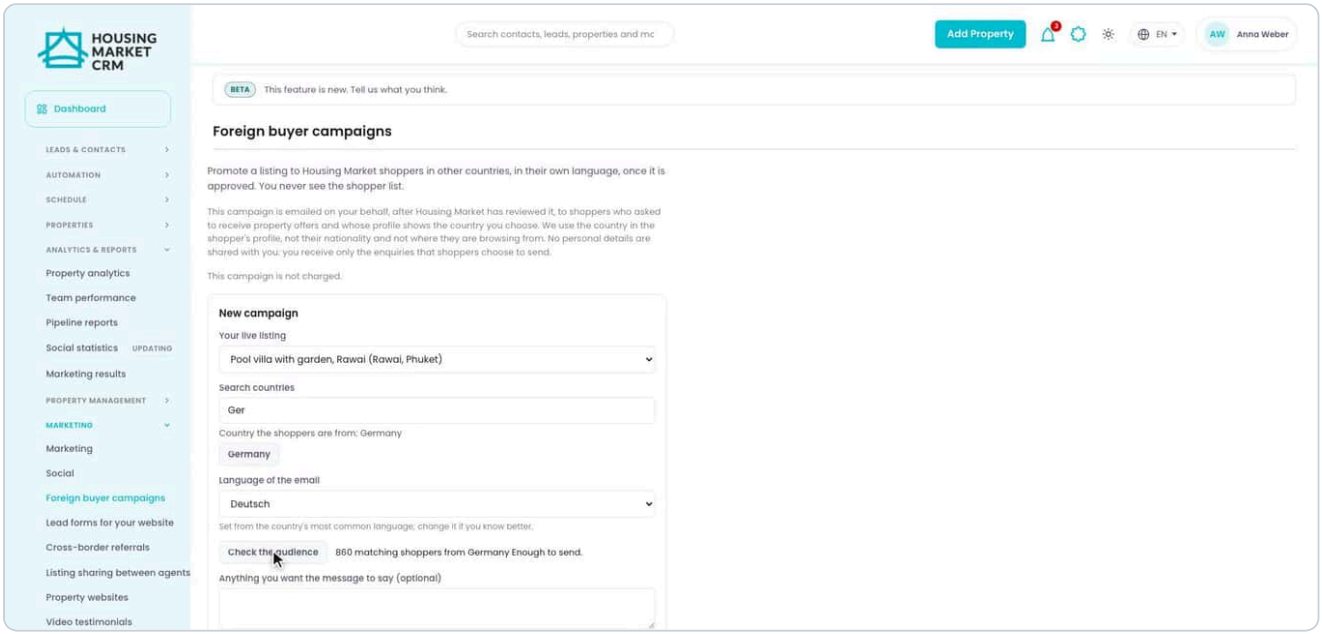


Figure 145.11 · Screen recorded 29 October 2026

12 You see a **number**, never a person.

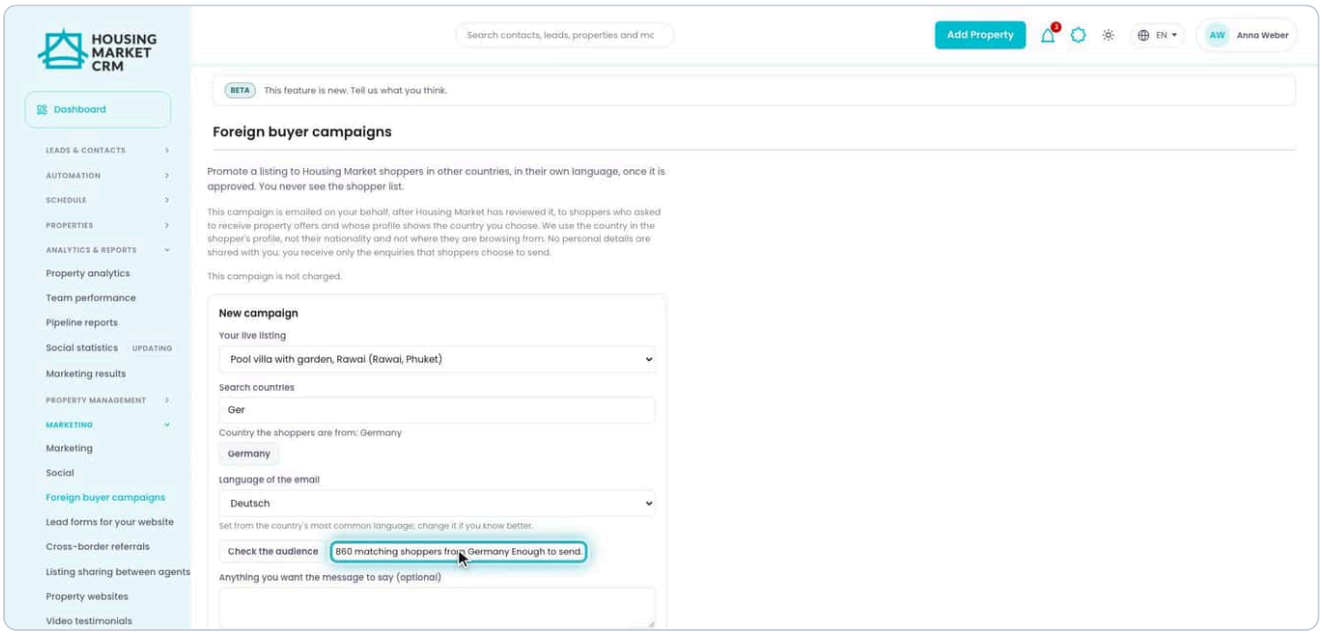


Figure 145.12 · Screen recorded 29 October 2026

13 Add anything you want the message to say, or leave it empty.

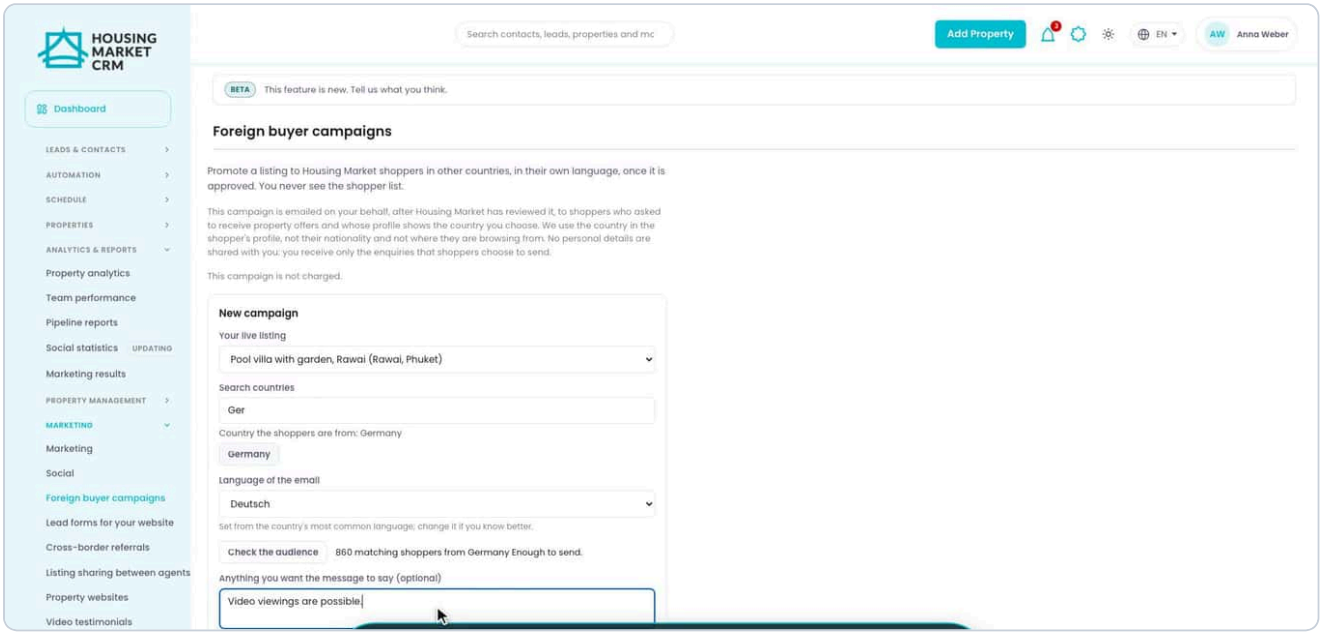


Figure 145.13 · Screen recorded 29 October 2026

14 Click **Write the draft**.

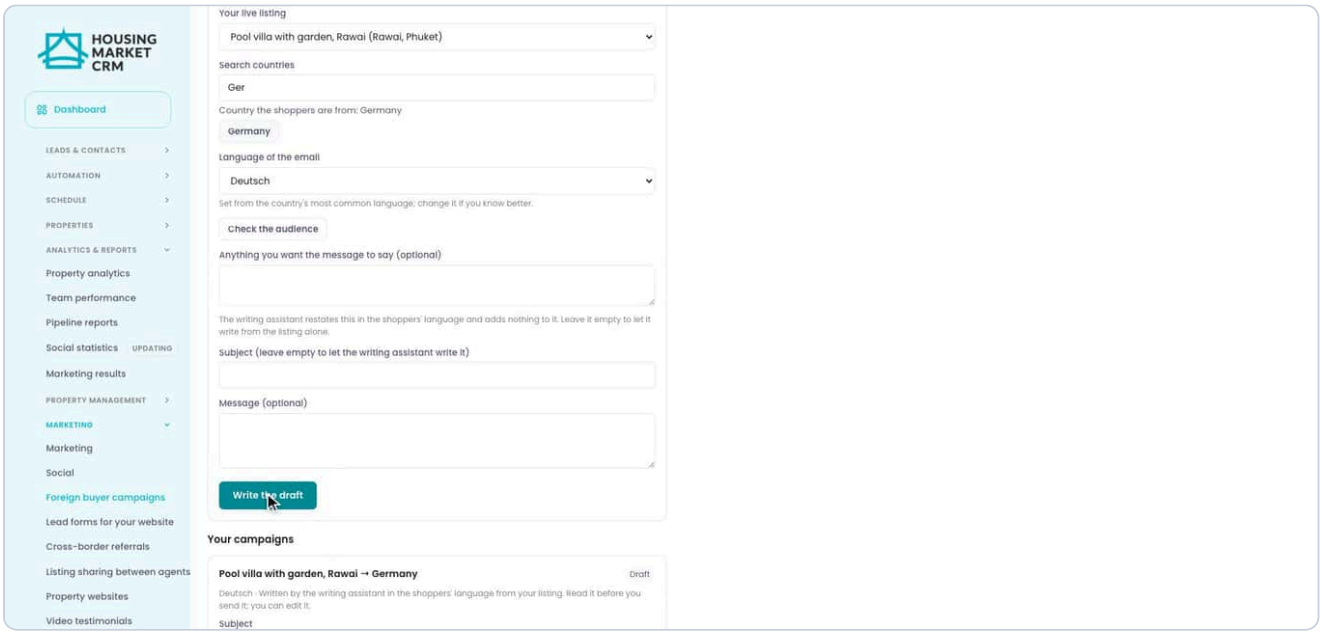


Figure 145.14 · Screen recorded 29 October 2026

15 The **writing assistant** writes it in the shoppers' language.

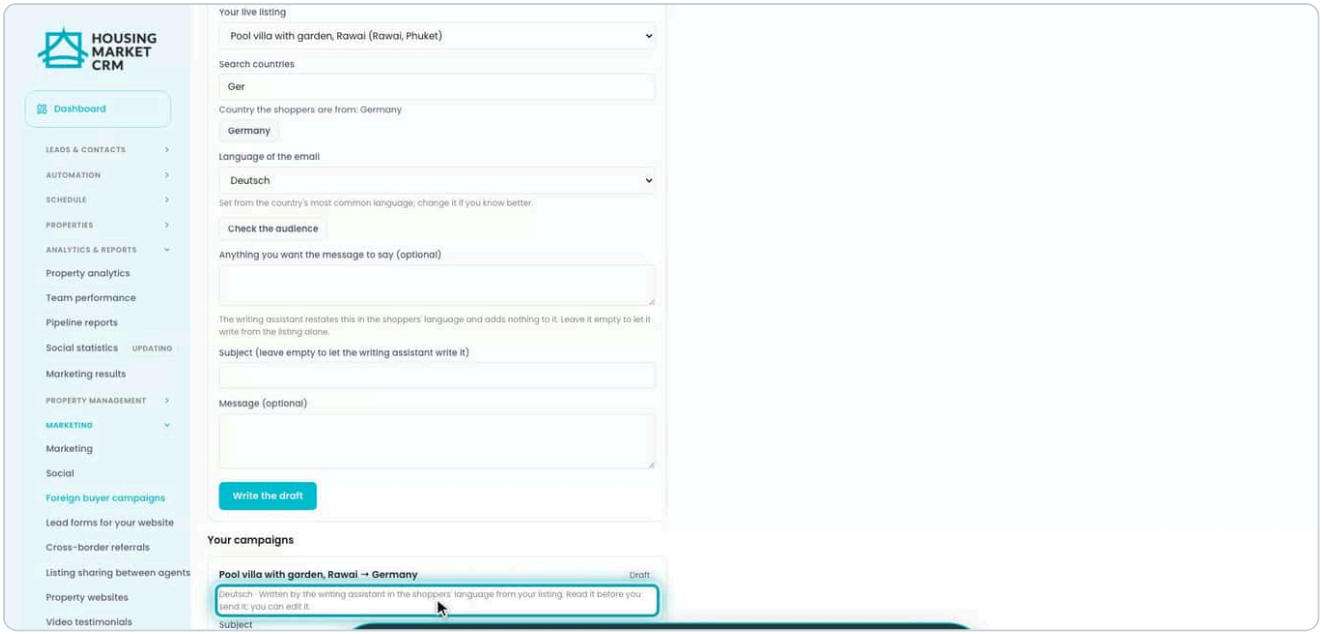


Figure 145.15 · Screen recorded 29 October 2026

16 Click **Preview the email**.

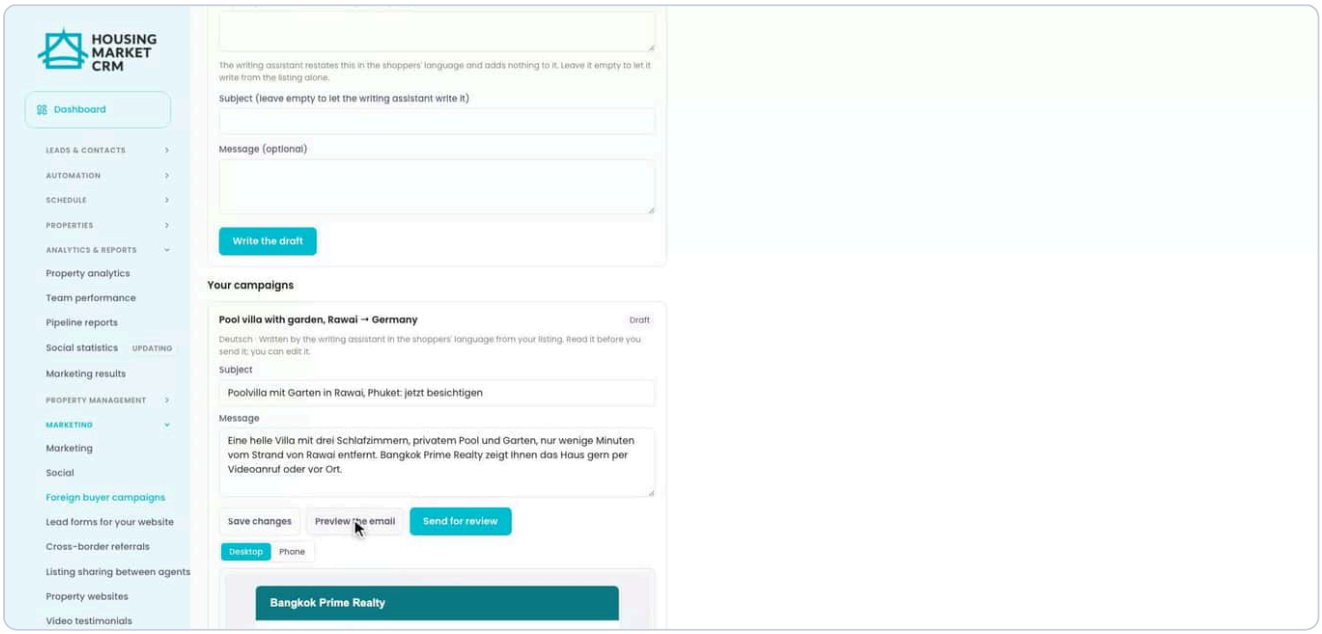


Figure 145.16 · Screen recorded 29 October 2026

17 Read it first. You can **edit** the subject and the message.

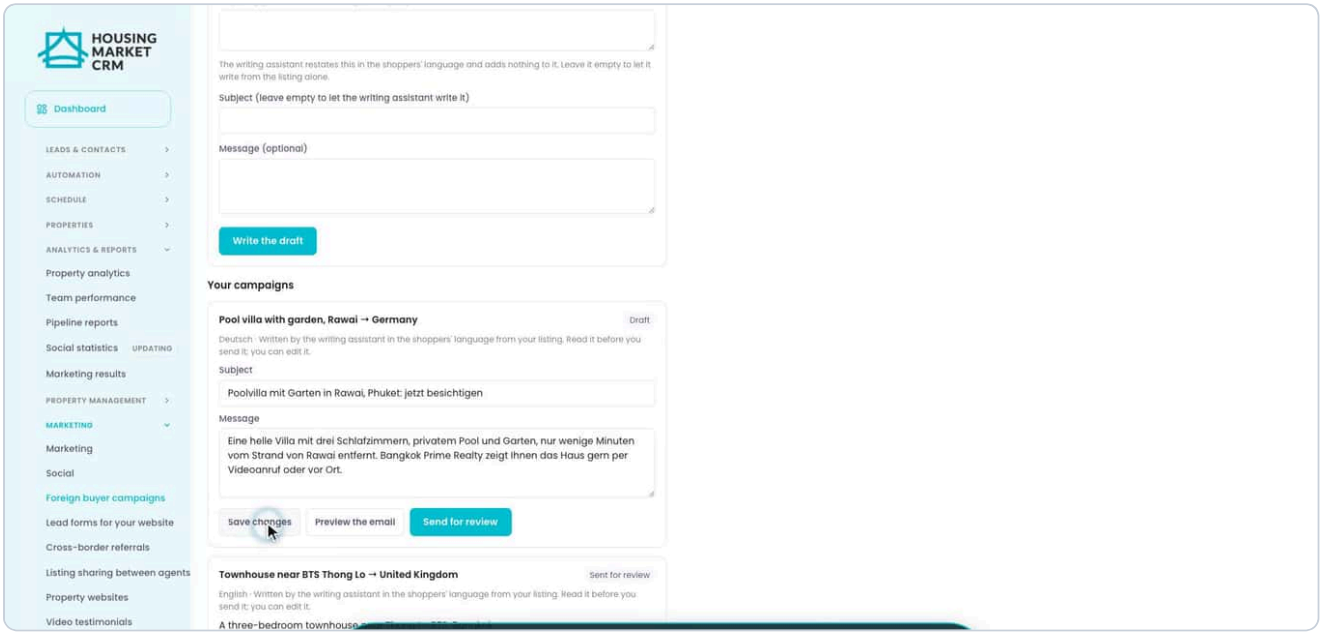


Figure 145.17 · Screen recorded 29 October 2026

18 Click **Send for review**.

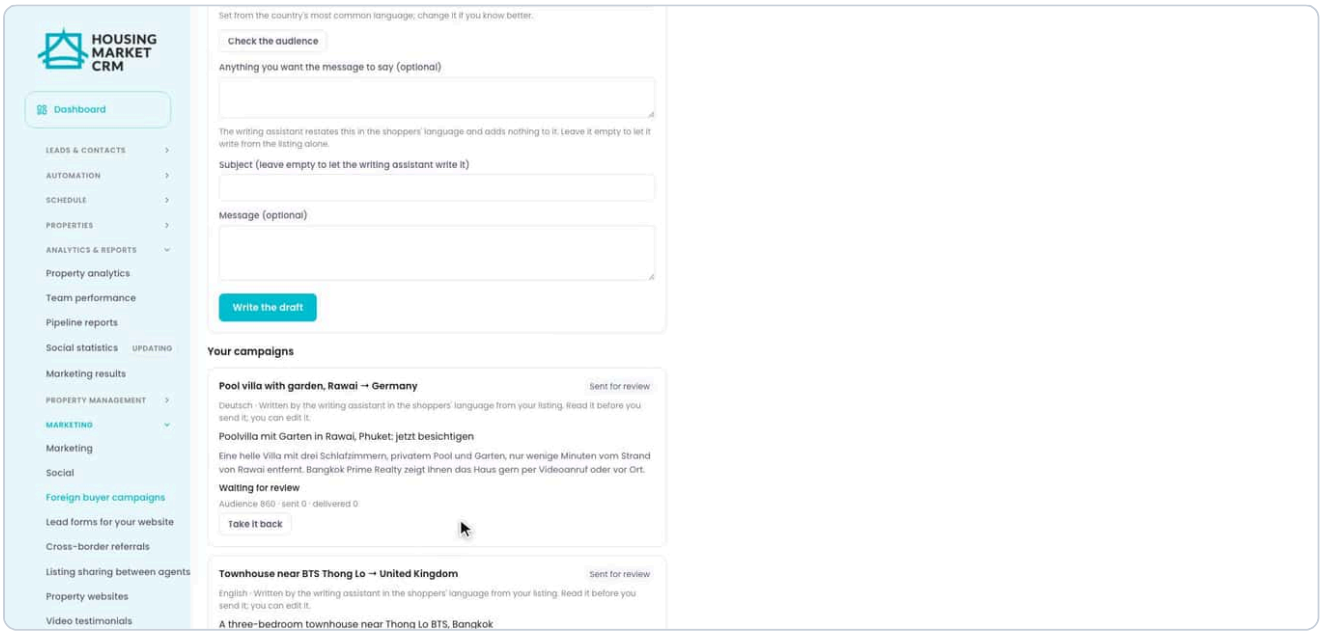


Figure 145.18 · Screen recorded 29 October 2026

19 Housing Market **reviews** it before it is sent.

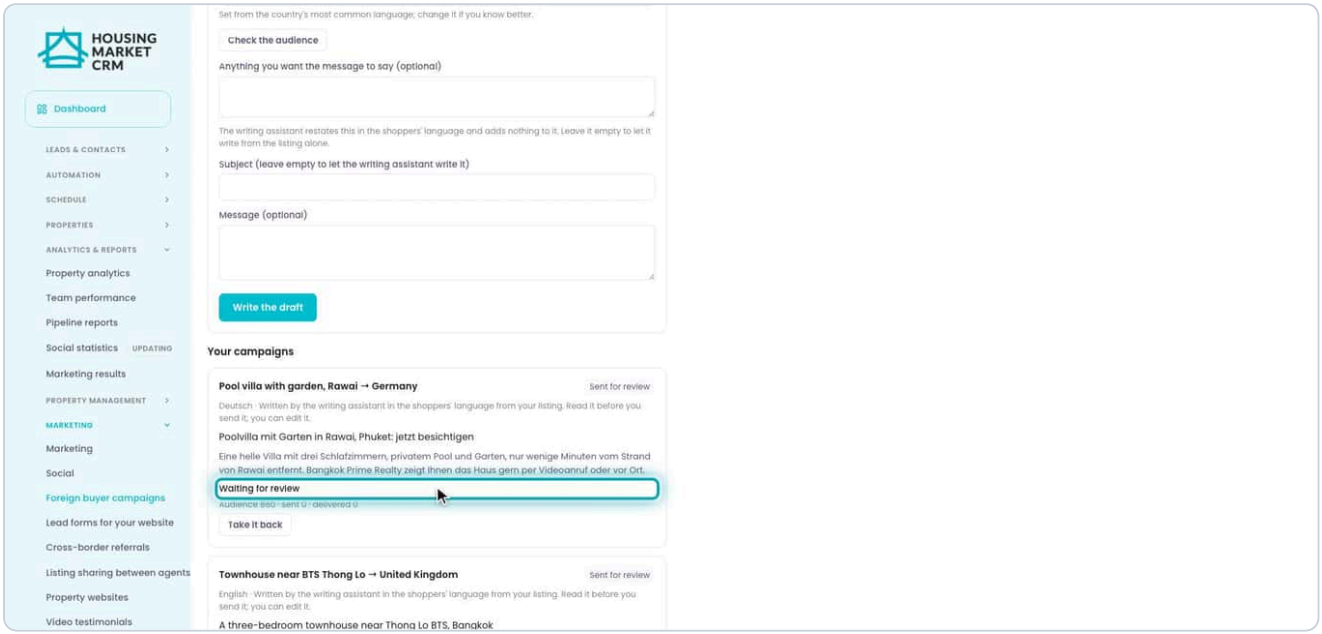


Figure 145.19 · Screen recorded 29 October 2026

20 Until it is approved, you can **take it back**.

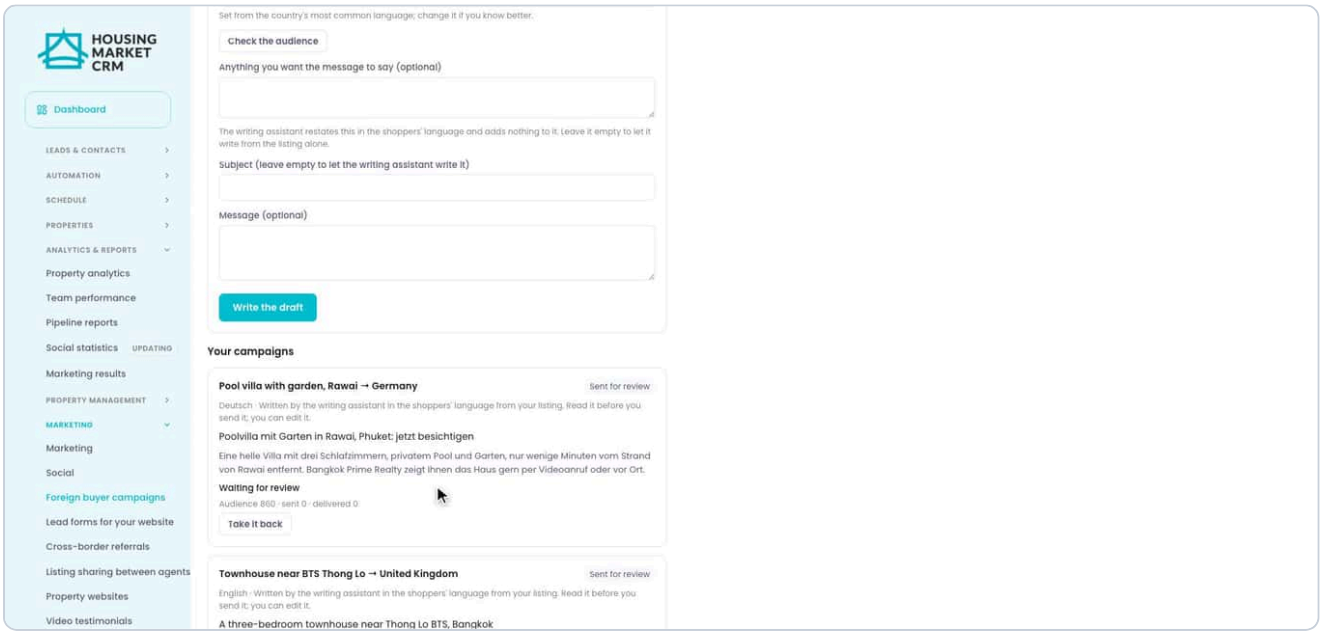


Figure 145.20 · Screen recorded 29 October 2026

146 CHAPTER 146

Share a listing with other agents

Pro and Business | For agents | Watch the video

OVERVIEW

Invite an agent you trust, agree a commission split and share your live listings, and they share theirs with you. The CRM records which link brought which buyer. It is part of the Pro plan.

Under Marketing, choose Listing sharing. Invite an agent by the email address she registered with, say what percent of the listing agent's commission goes to the agent whose link brings the buyer, and add a line for her if you like. The split is fixed in the invitation. To change it, end the partnership and invite again. She can accept or decline, and the invitation expires if she does not answer.

With an active partner you can share one of your live listings after you tick that you have the right to share it and that the owner agreed. The partner gets a tracked link for it. Anyone who enquires within 30 days of using that link, on the same device, is credited to the sharing agent. The buyer stays the listing agent's. Choose Stop sharing to withdraw a listing.

When a deal closes, record the commission and its currency on the lead. The deal then shows the agreed split as Split due, Marked as paid by the listing agent, Settled or Waived.

This is a record of what the two of you agreed. Housing Market does not calculate, collect or pay commission, is not a party to the agreement and is not responsible for it.

From the Help Center: **How does listing sharing between agents work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

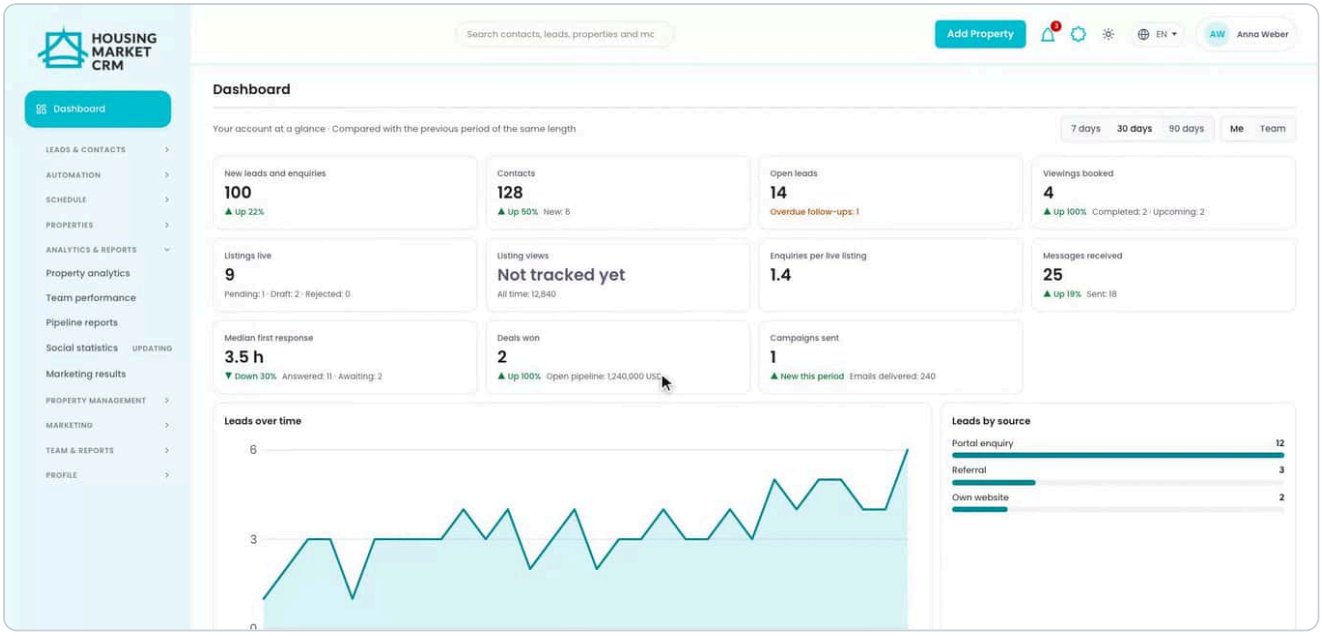


Figure 146.1 · Screen recorded 29 October 2026

2 Open the **Marketing** group in the left menu.

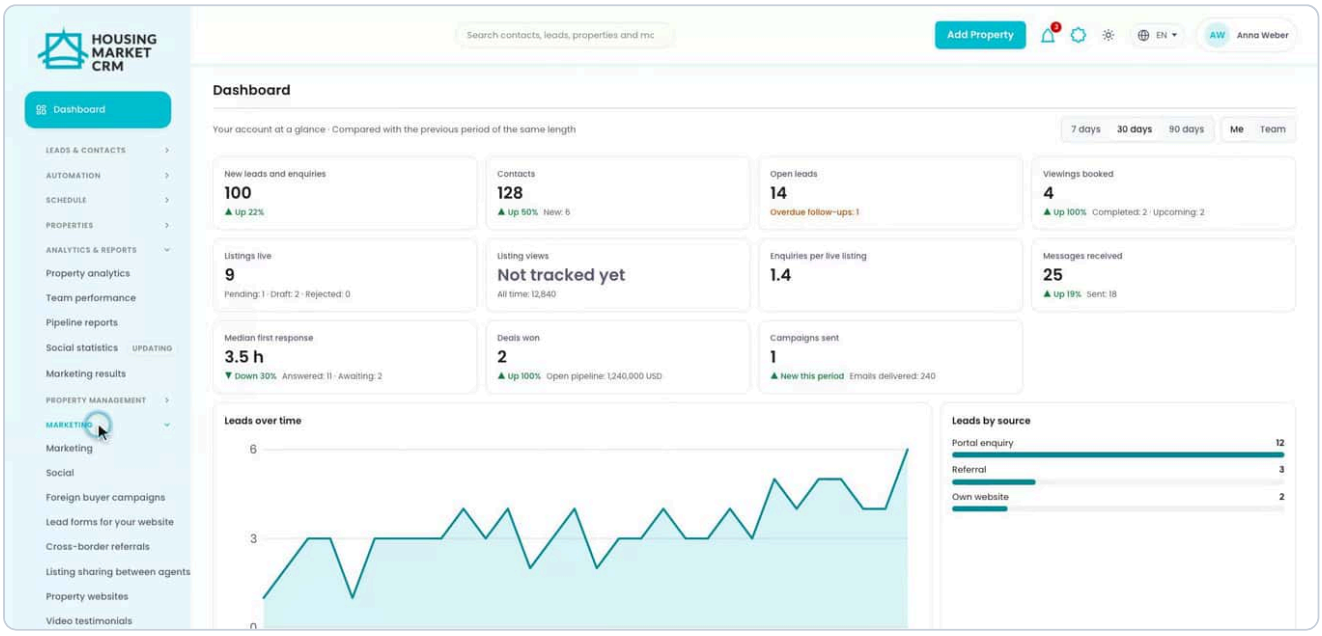


Figure 146.2 · Screen recorded 29 October 2026

3 Click **Listing sharing between agents**.

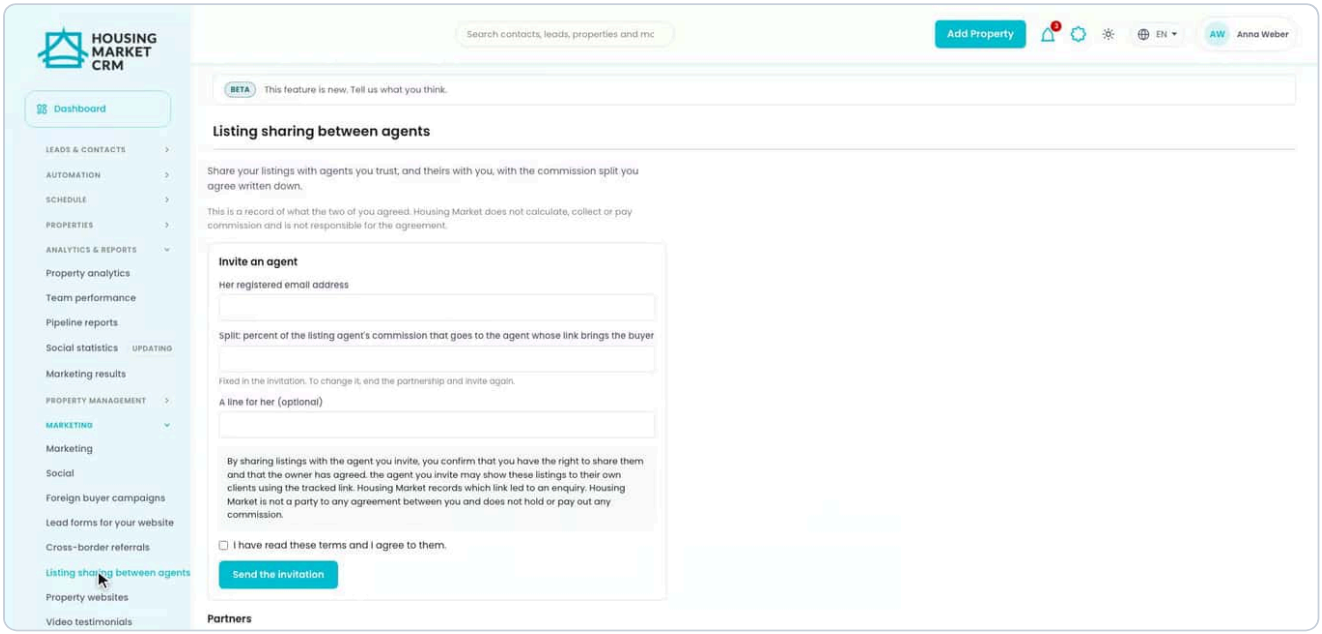


Figure 146.3 · Screen recorded 29 October 2026

4 This feature is new and shows a **Beta** badge while we refine it.

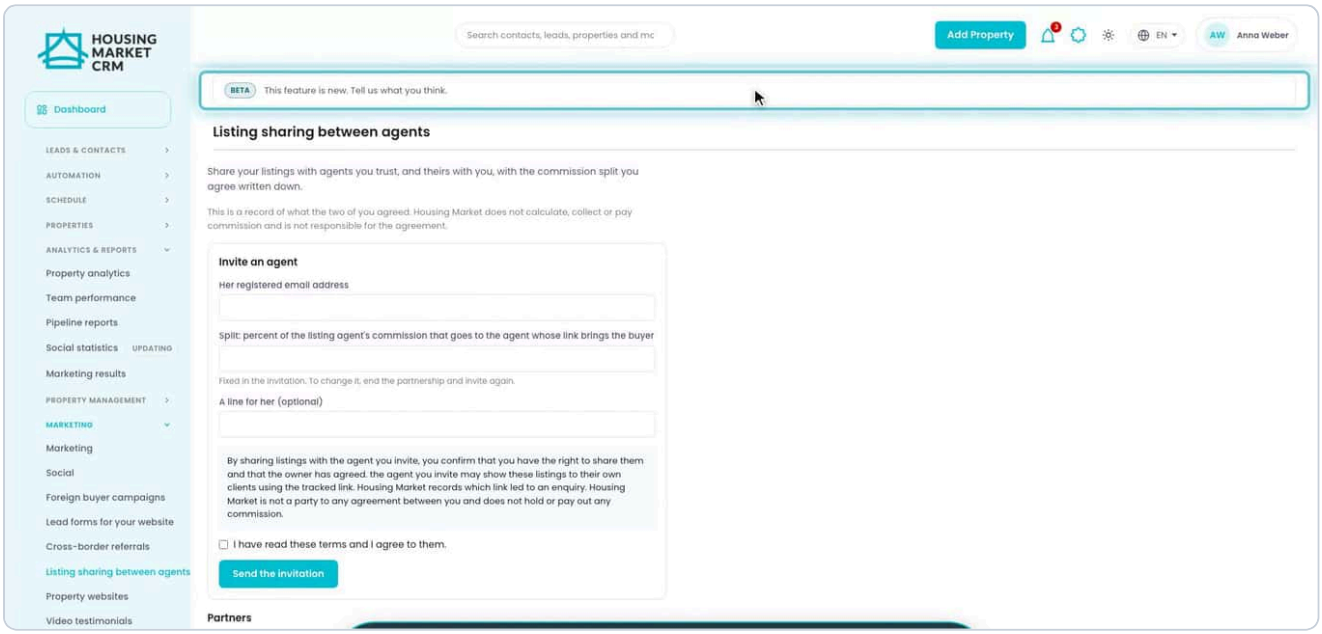


Figure 146.4 · Screen recorded 29 October 2026

5 It is a **record** of what you agreed. No money moves.

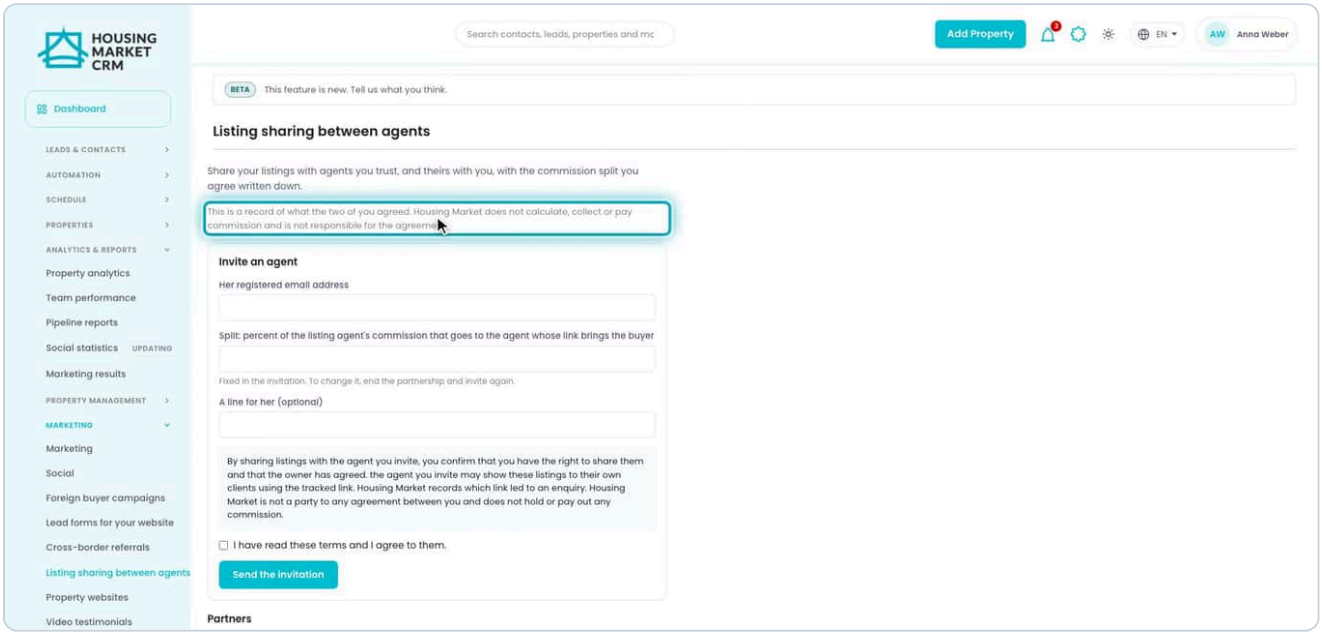


Figure 146.5 · Screen recorded 29 October 2026

6 Enter the agent's **registered email address**.

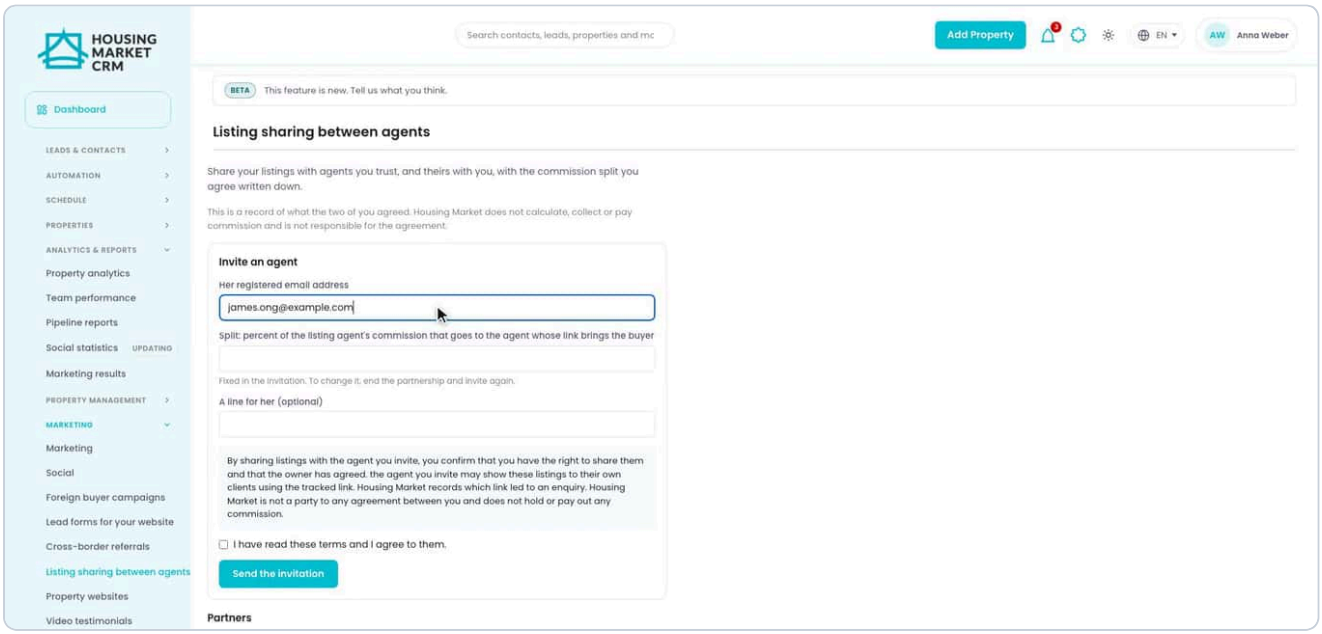


Figure 146.6 · Screen recorded 29 October 2026

7 Set the **split** in the invitation.

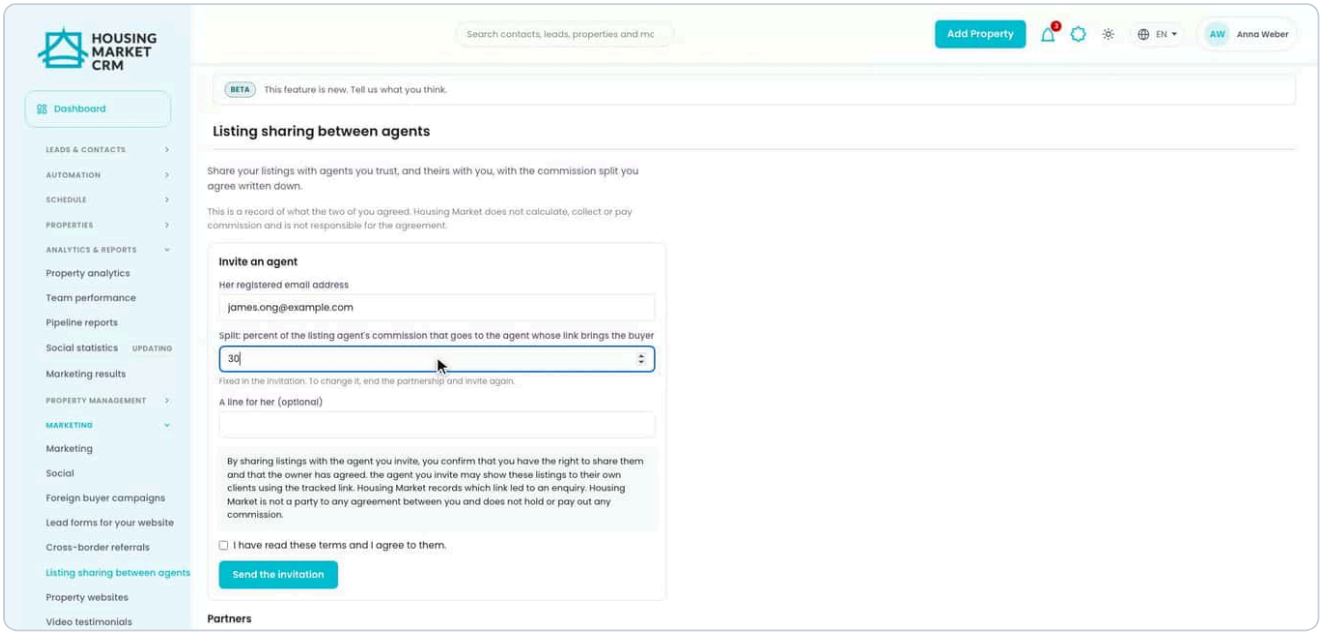


Figure 146.7 · Screen recorded 29 October 2026

8 To change it later, **end the partnership** and invite again.

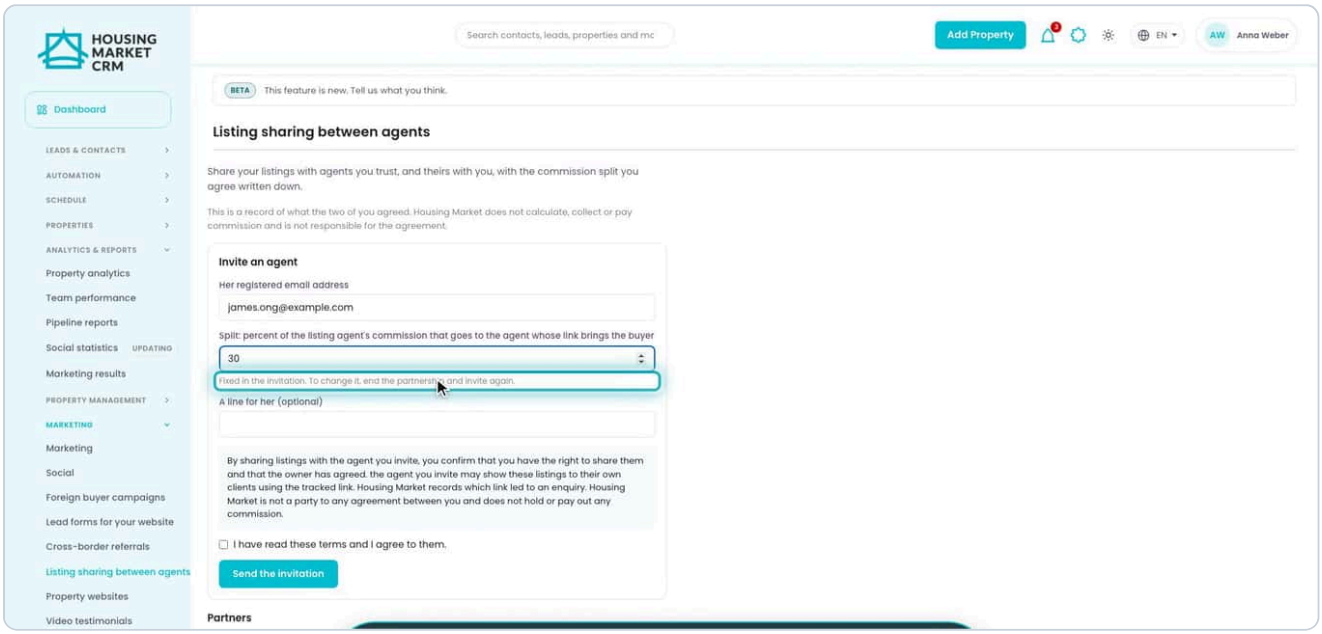


Figure 146.8 · Screen recorded 29 October 2026

9 Read the **terms** and tick the box.

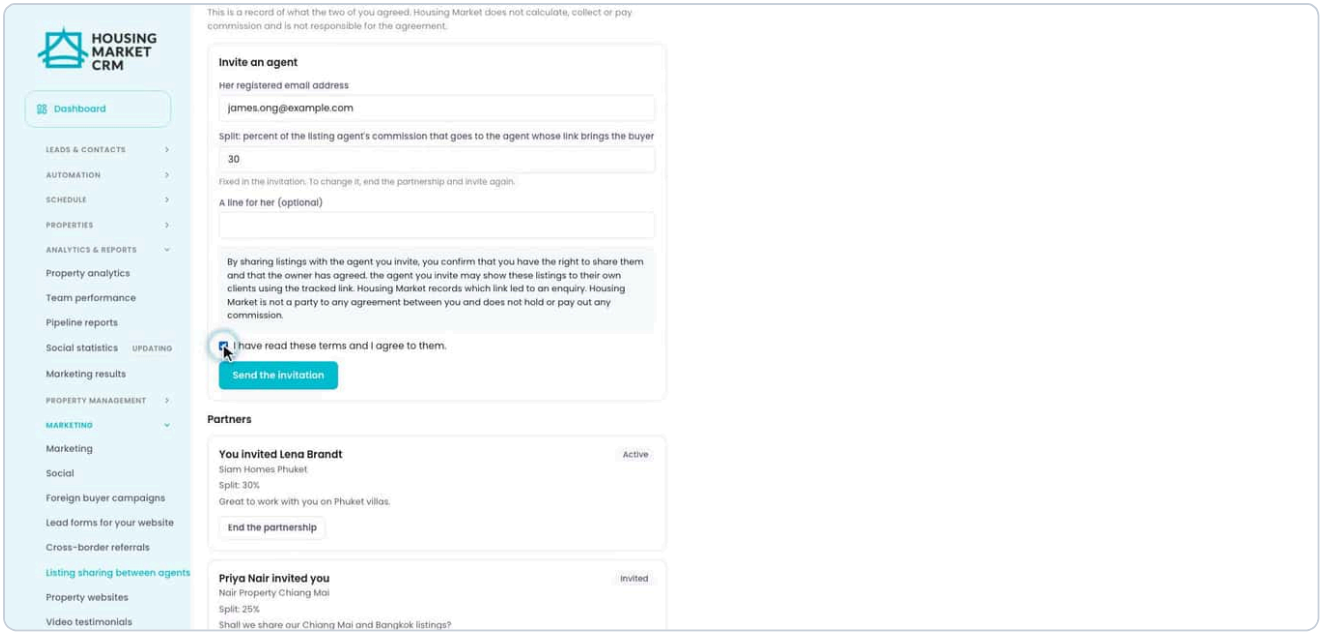


Figure 146.9 · Screen recorded 29 October 2026

10 Click **Send the invitation**.

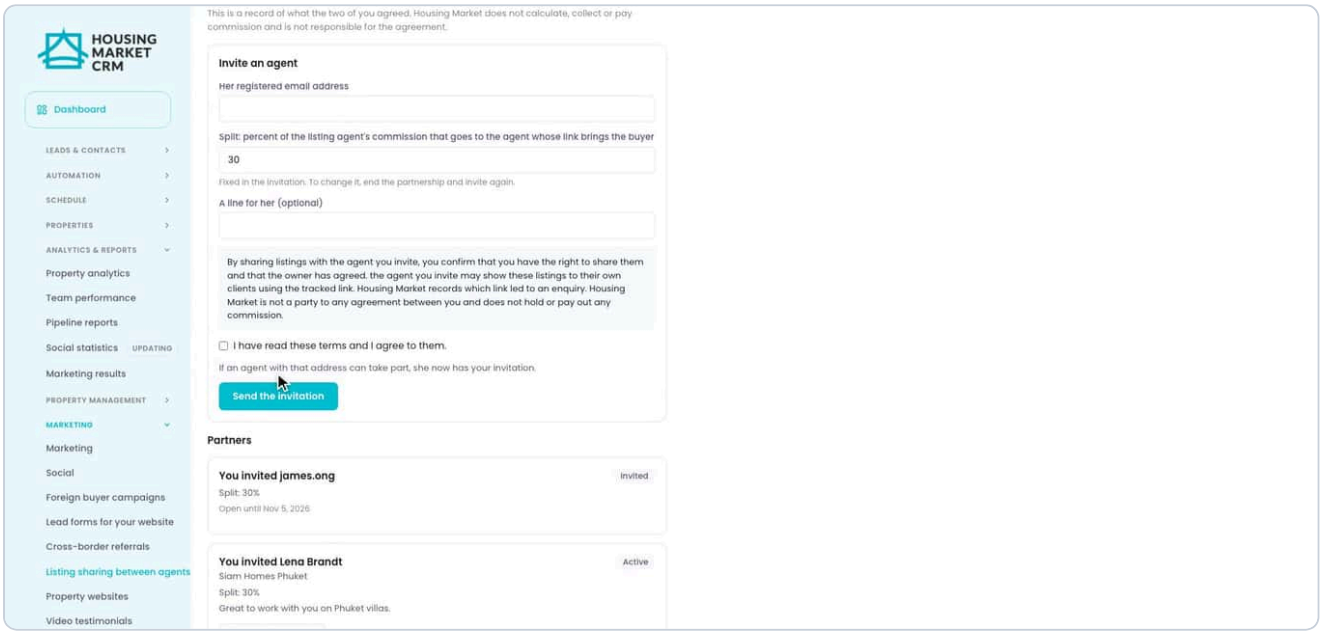


Figure 146.10 · Screen recorded 29 October 2026

11 Your partners and invitations are listed here.

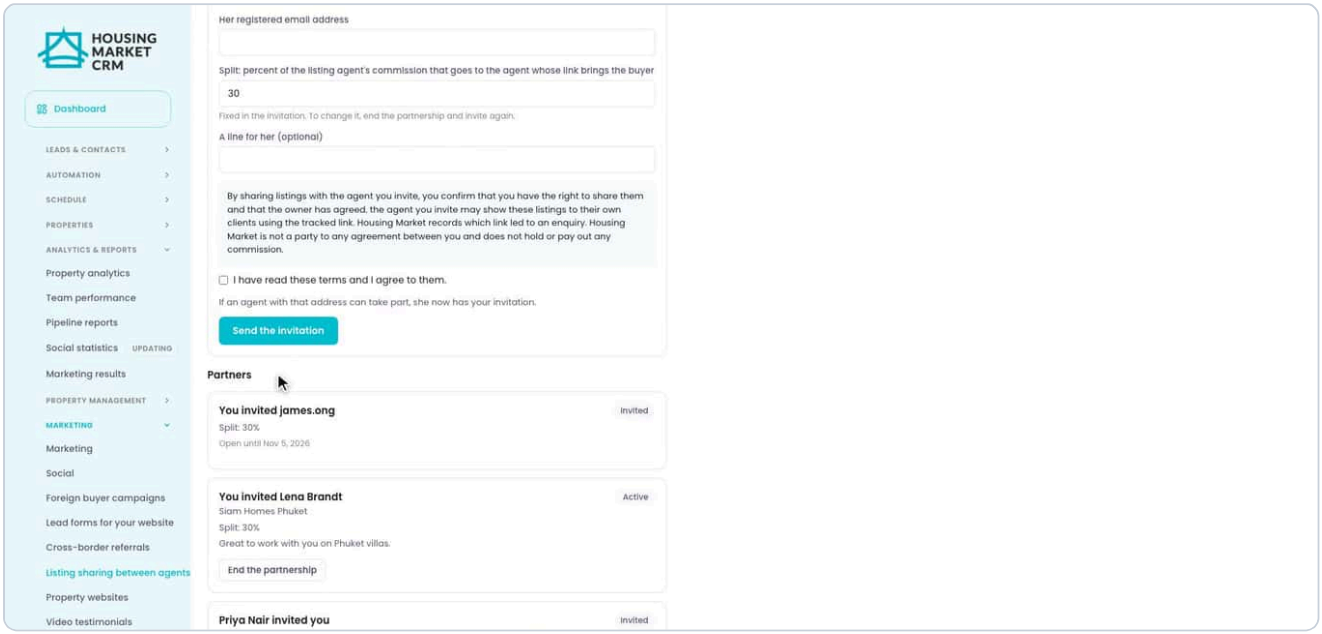


Figure 146.11 · Screen recorded 29 October 2026

12 An invitation you receive shows the **split** and the terms.

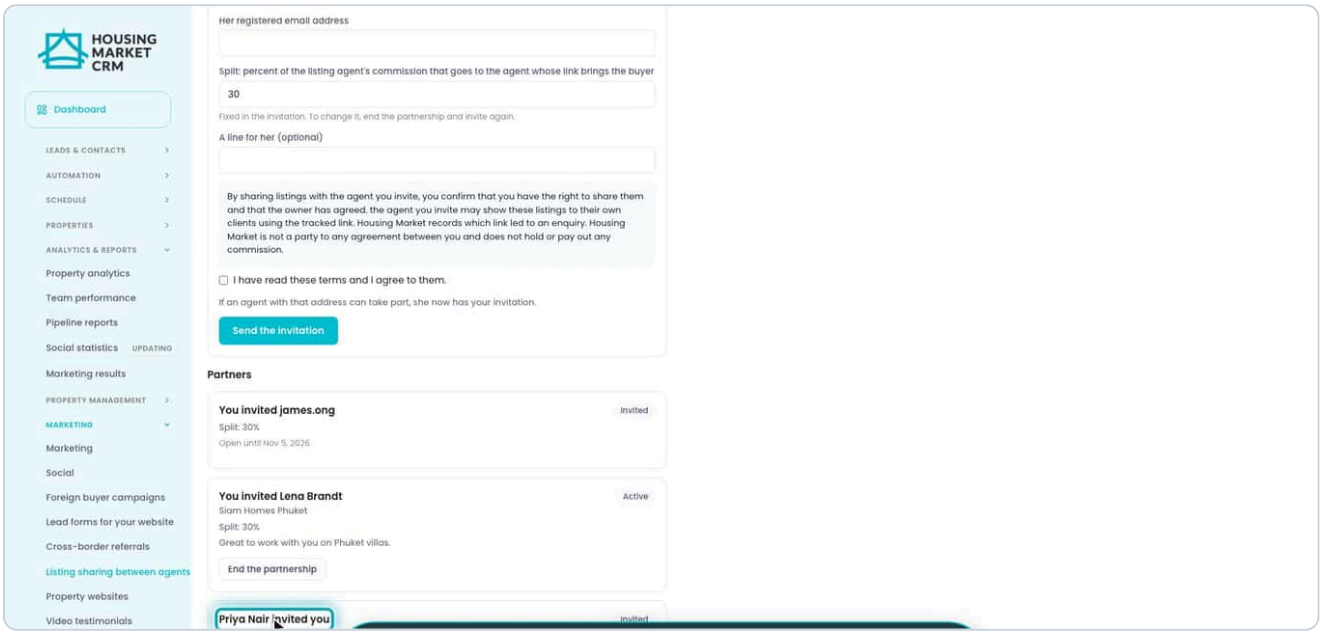


Figure 146.12 · Screen recorded 29 October 2026

13 Tick the terms, then **Accept** or **Decline**.

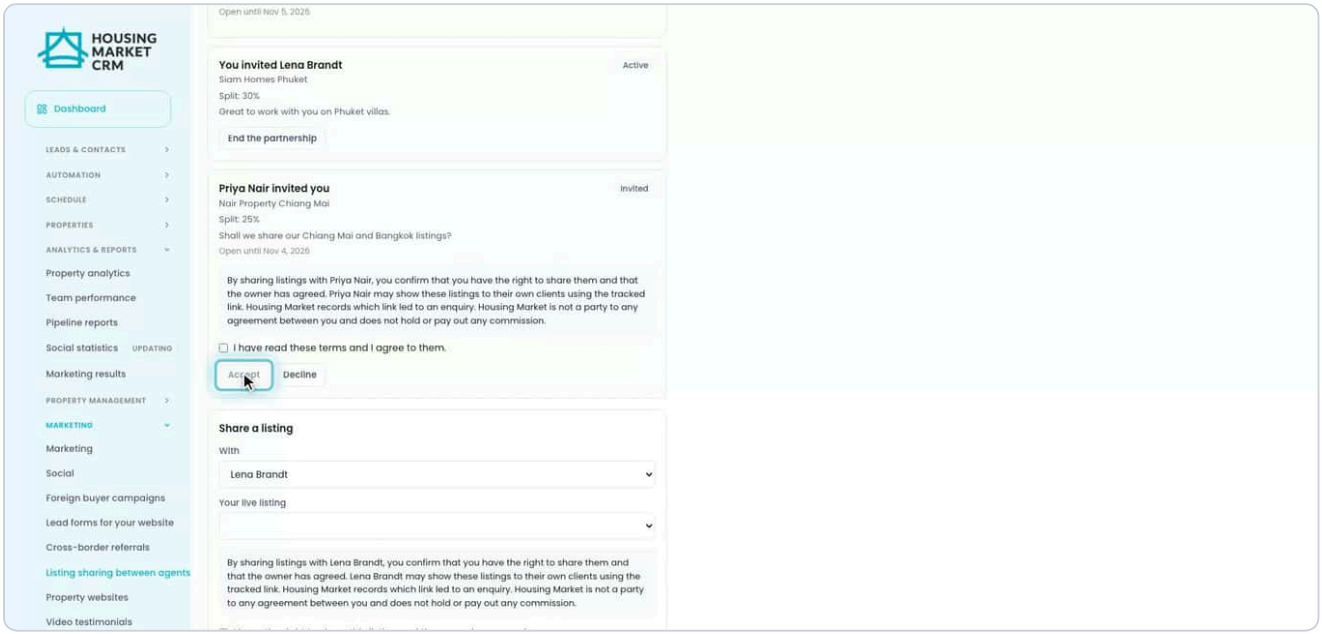


Figure 146.13 · Screen recorded 29 October 2026

14 Share a listing with an **active partner**.

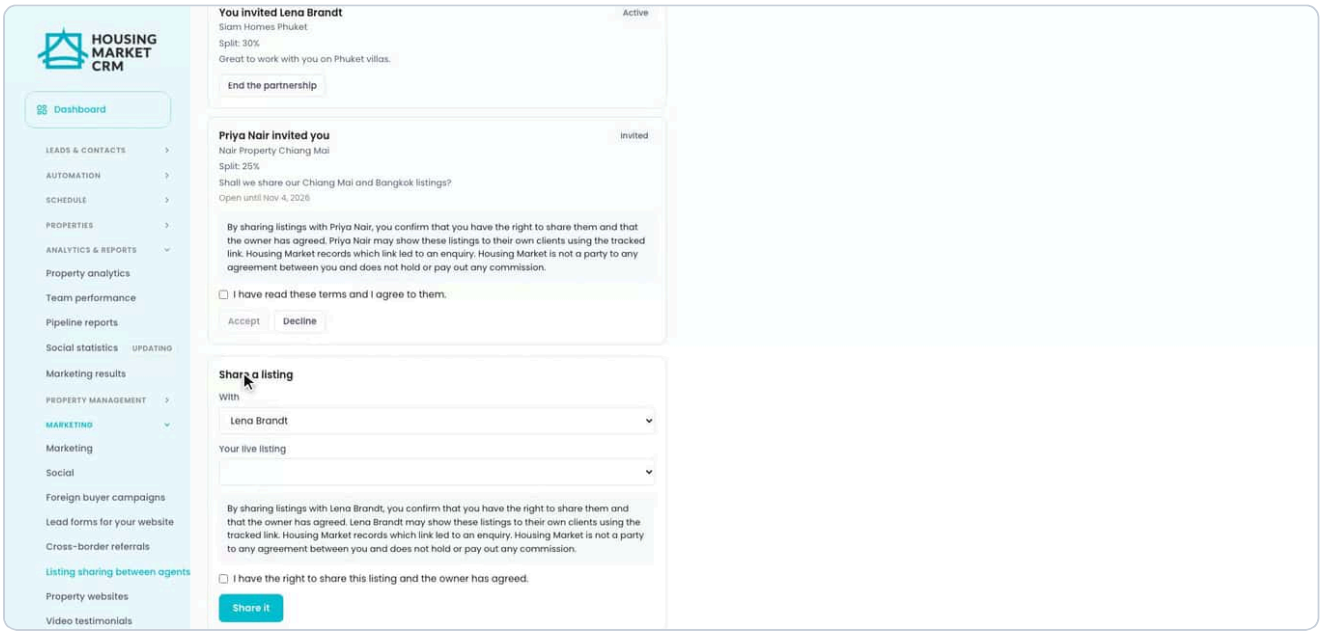


Figure 146.14 · Screen recorded 29 October 2026

15 Choose one of your **live listings**.

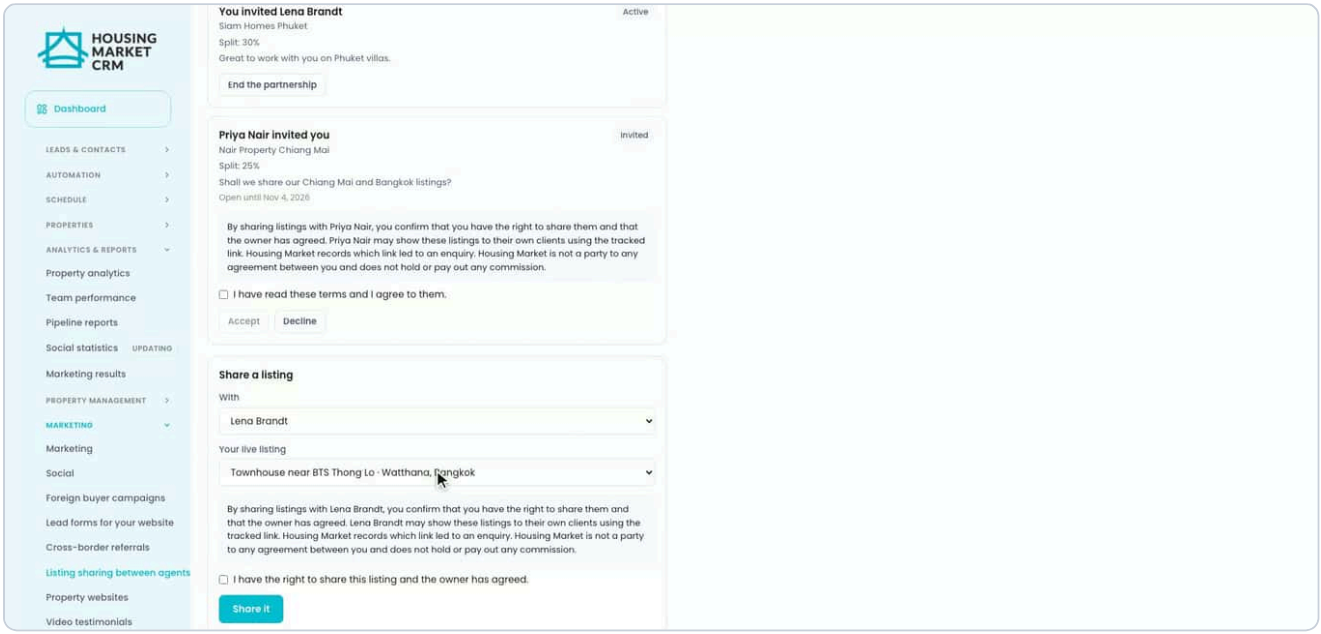


Figure 146.15 · Screen recorded 29 October 2026

16 Confirm that you have the **right** to share it.

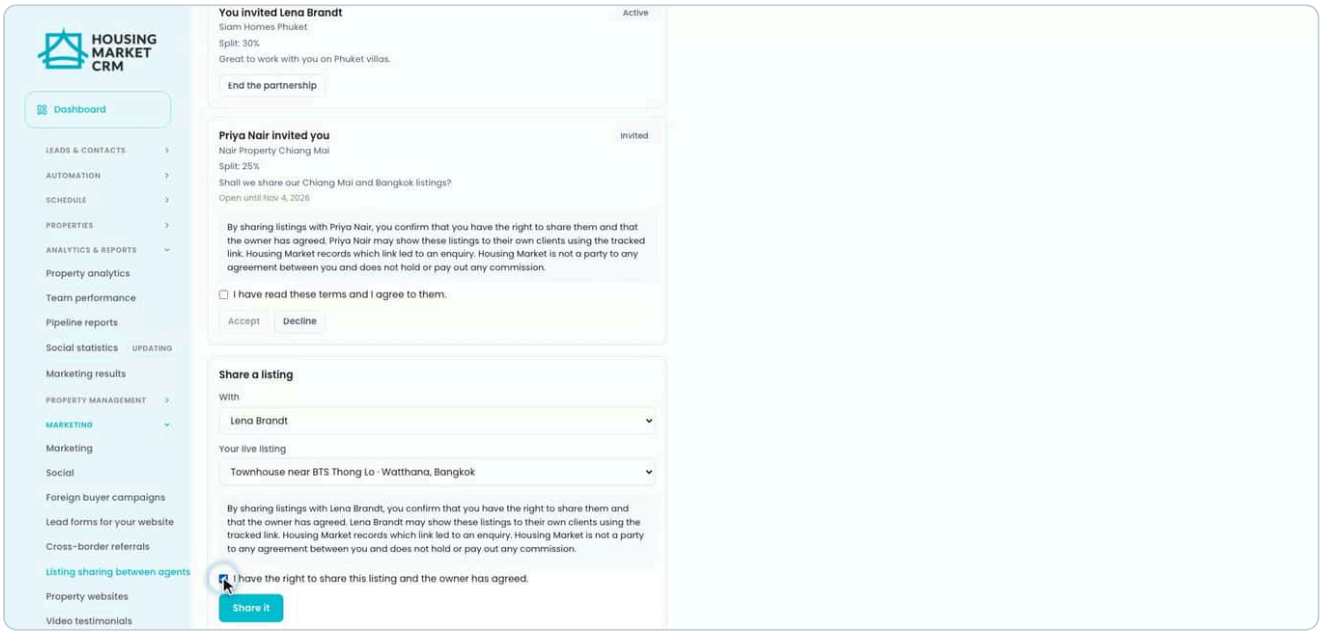


Figure 146.16 · Screen recorded 29 October 2026

17 Click **Share it**.

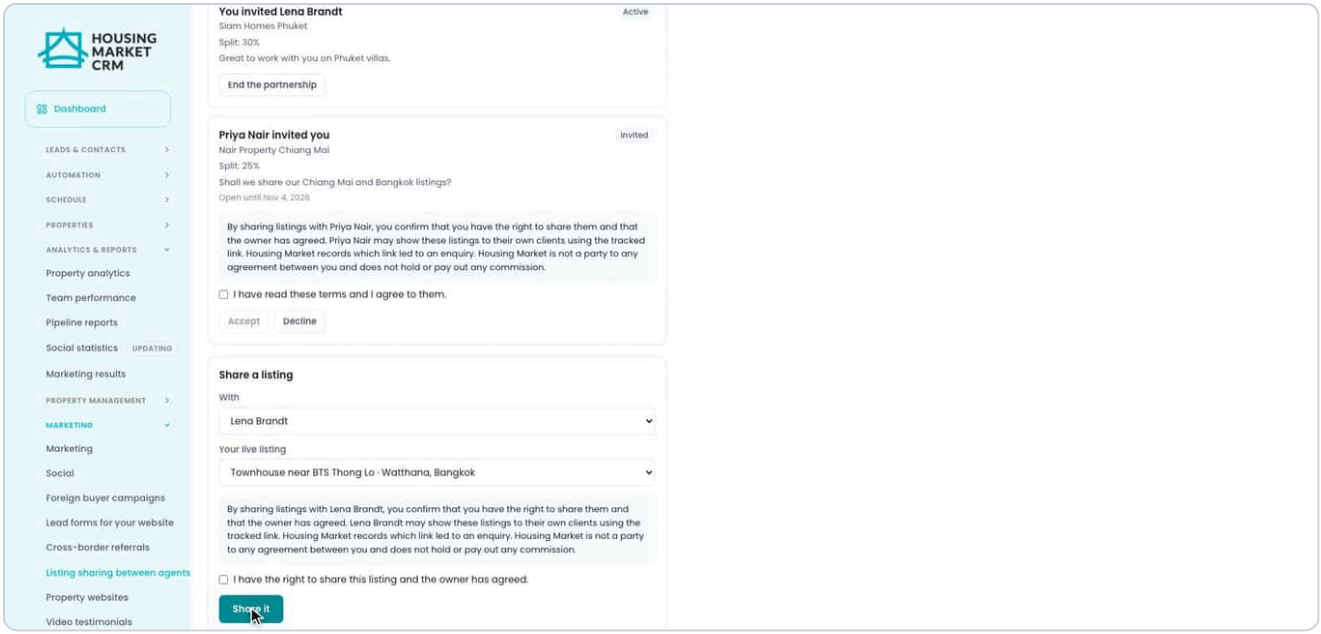


Figure 146.17 · Screen recorded 29 October 2026

18 It now appears under **Listings I shared**.

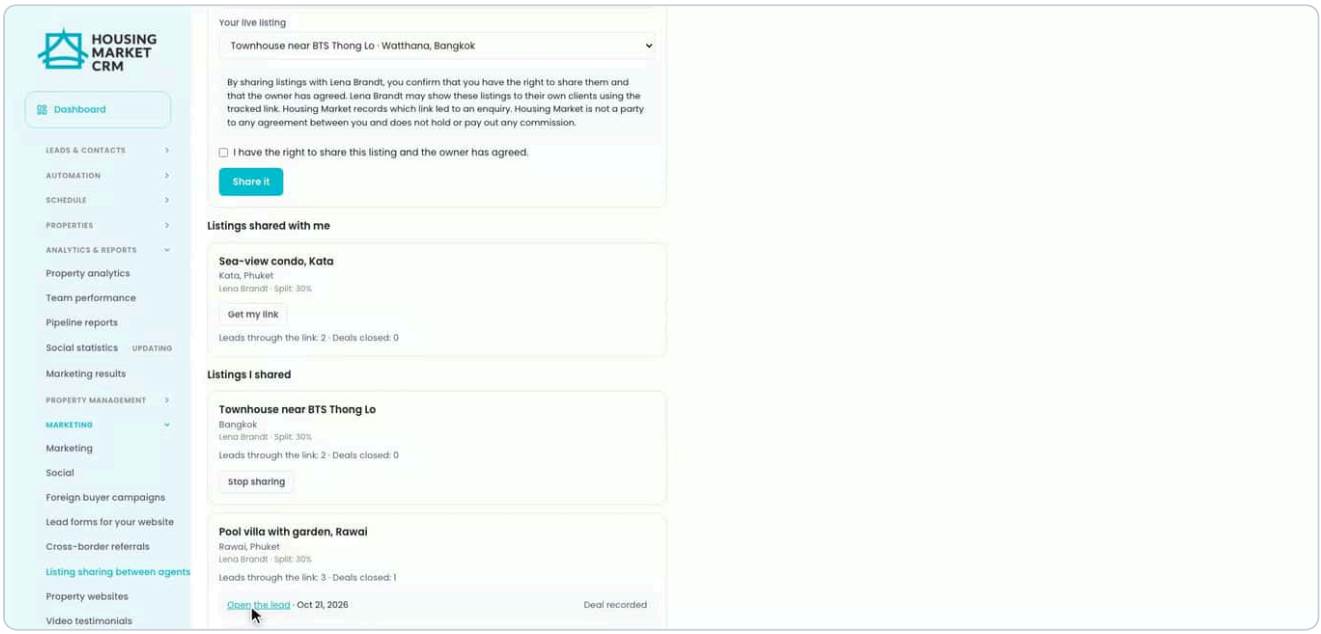


Figure 146.18 · Screen recorded 29 October 2026

19 Listings **shared with you** get your own link.

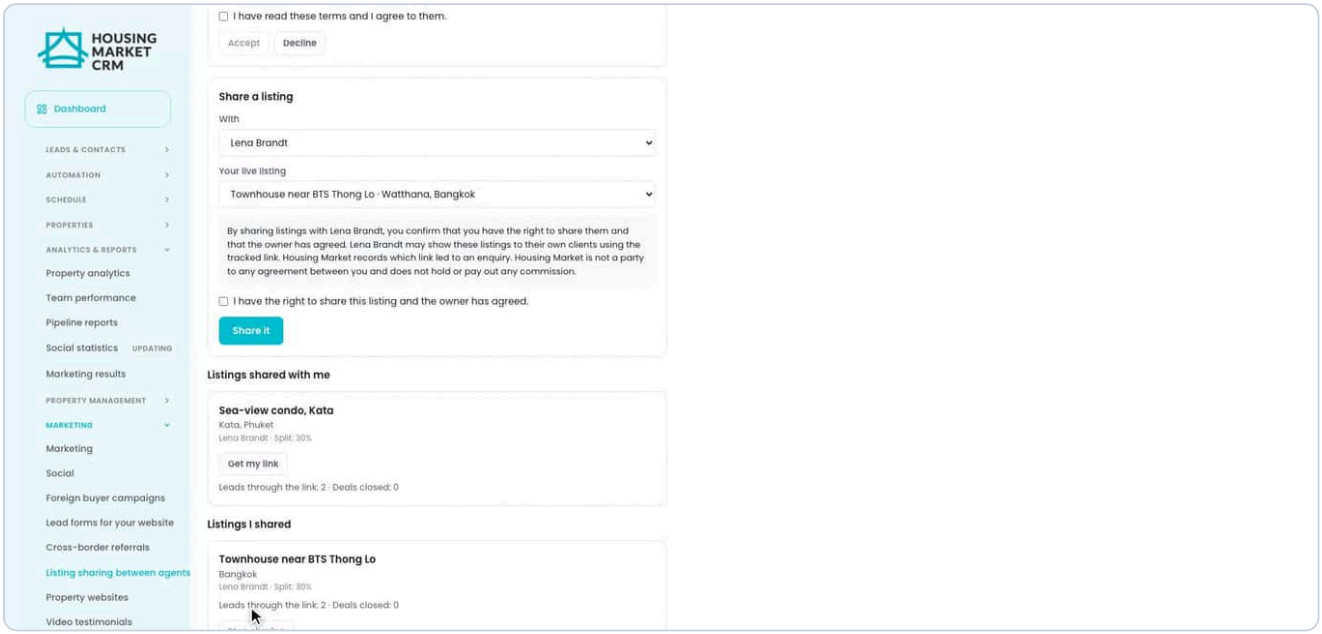


Figure 146.19 · Screen recorded 29 October 2026

20 Click **Get my link**.

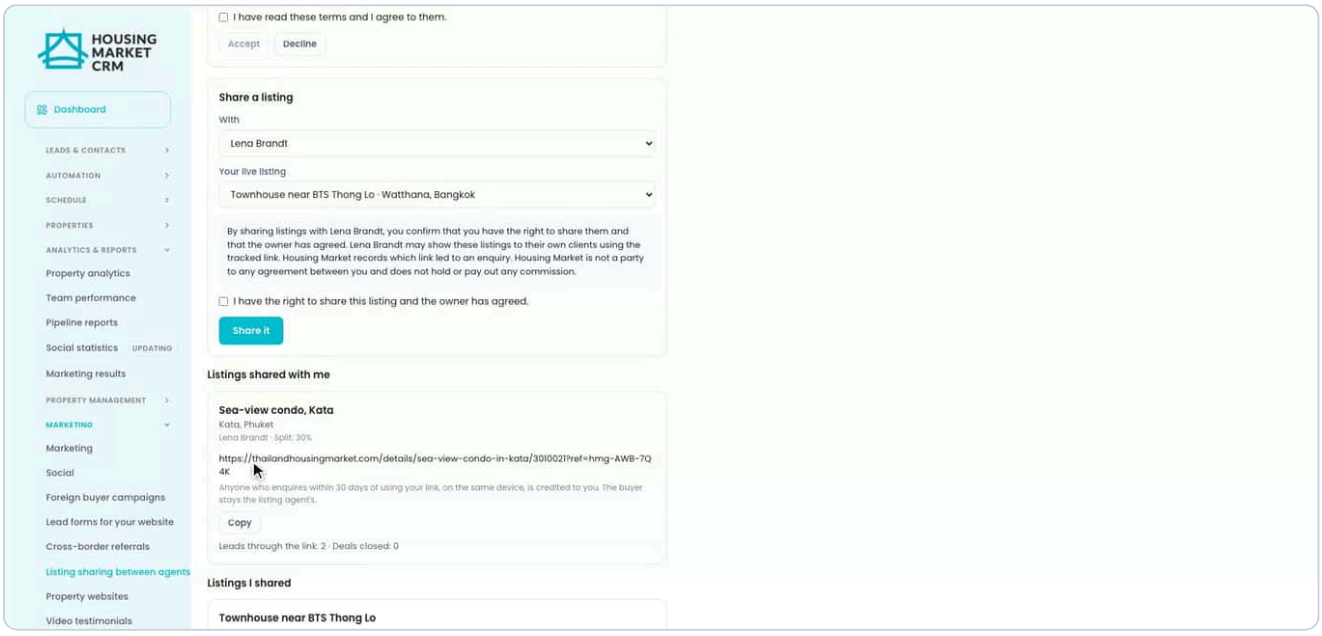


Figure 146.20 · Screen recorded 29 October 2026

21 Enquiries within **30 days** are credited to you.

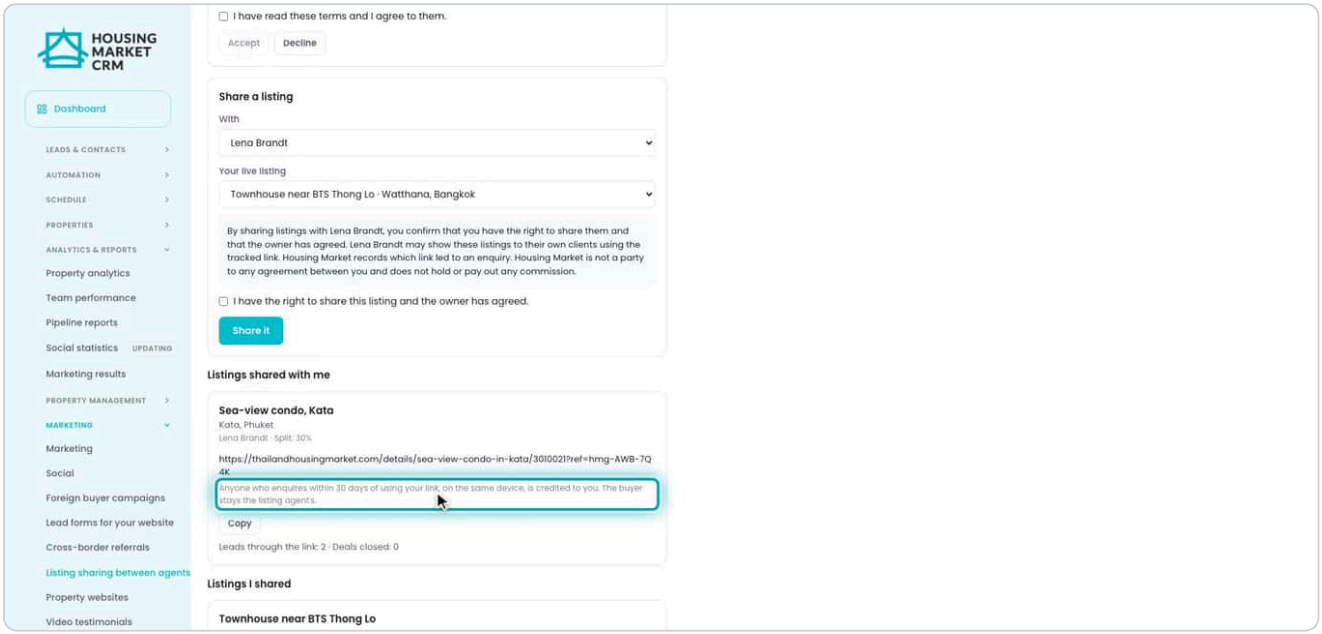


Figure 146.21 · Screen recorded 29 October 2026

22 Each closed deal and its split are **recorded** here.

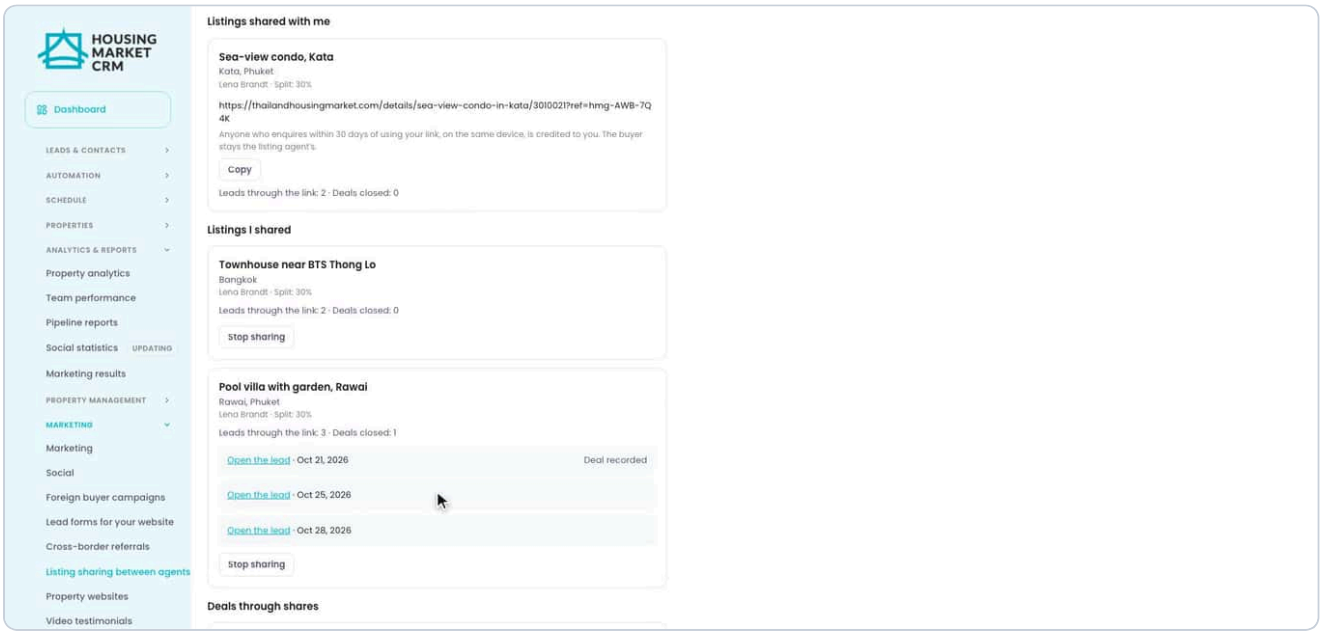


Figure 146.22 · Screen recorded 29 October 2026

147 CHAPTER 147

Pro tools: anniversaries and past-client referrals

Pro and Business | For agents who want their properties on their own website | Watch the video

OVERVIEW

Under Marketing, Pro tools holds an AI writer, seller presentations, weekly seller reports and a marketing score for each listing. Market and clients adds a market calendar, an area newsletter, anniversary emails, referral links, shortlists and a daily coach.

The Pro marketing tools are part of the Pro and Business plans. On a Free plan the tools are shown as locked, with the way to upgrade. Under Marketing, choose Pro tools, and open the Market and clients tab for the second group.

Pro tools

- AI writer writes a draft in seconds: a listing description, an email about a property or the text of a seller presentation, in any of seventeen languages. Listing descriptions can be written only in the languages your portal publishes. The draft uses only the details you give it and the listing you choose, prices and street addresses are never sent to the writer, and nothing is stored. Read it and correct it before you use it.
- Seller presentations makes a presentation for a seller meeting from one of your live listings: your pitch, a market estimate range from comparable listings, the price you suggest and how you will market the property. Print it or save it as a PDF in the seller's language. The market estimate is a snapshot of the day you made it, and when there are too few similar listings nearby the presentation says so instead of guessing.
- Seller reports keeps the owner of a listing informed with an email every Monday with the week's views, enquiries and viewings, and a live page they can open at any time with a link that you can replace. You first confirm that the seller asked for the report. Nothing is sent to someone who unsubscribed.
- Marketing score gives one of your live listings a score out of 100 from its photos, video and tour, description, details, price against the market estimate and views, and lists the few things that would raise it. A part that cannot be judged yet is left out instead of counting as zero.

Market and clients

- Market calendar has ready-made greetings for the key dates of a market, already written in every language. Pick a date, check the words, choose who gets it and when, and it is sent for you on the day. Nothing goes out without your confirmation.
- Area newsletter sends the people in one of your saved segments, once a month, the market figures of one district from Housing Market Insights with a few of your own live homes below. It is never sent twice in a month and never when there is too little data behind the figures.
- Anniversaries writes to each client on the anniversary of the day they got their home, with a short market estimate when we can stand behind one.
- Referral links gives each past client their own link. Anyone who opens it lands on your profile page, and an enquiry made within 30 days arrives as a lead with the source Referral. You see how many people opened each link, how many enquiries came through it and how many became deals.
- Shortlists puts some of your live homes behind one link that you send to a buyer. To open a home's page, the visitor gives you their name and email.
- Coach suggests three things worth doing today, picked from your own marketing. Nothing is sent for you.

Every email from these tools goes only to people you are allowed to write to, and each follows the same unsubscribe rules as your campaigns.

From the Help Center: **What are the Pro marketing tools?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

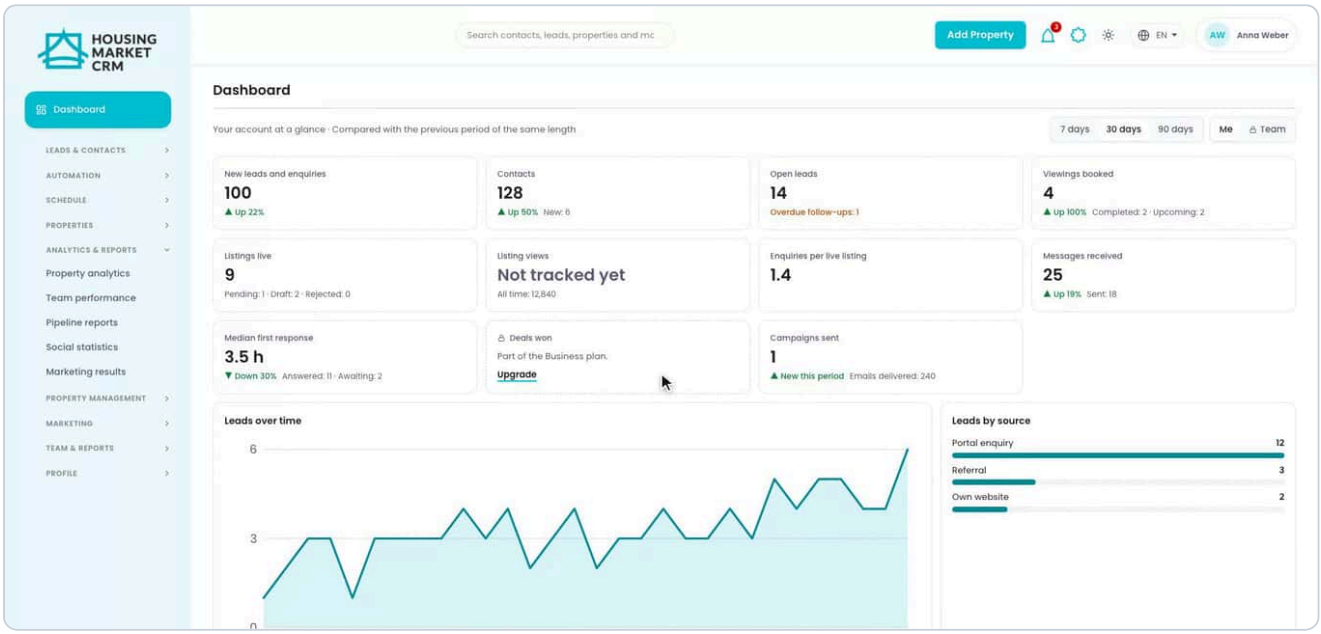


Figure 147.1 · Screen recorded 4 November 2026

2 Open **Marketing** in the left menu.

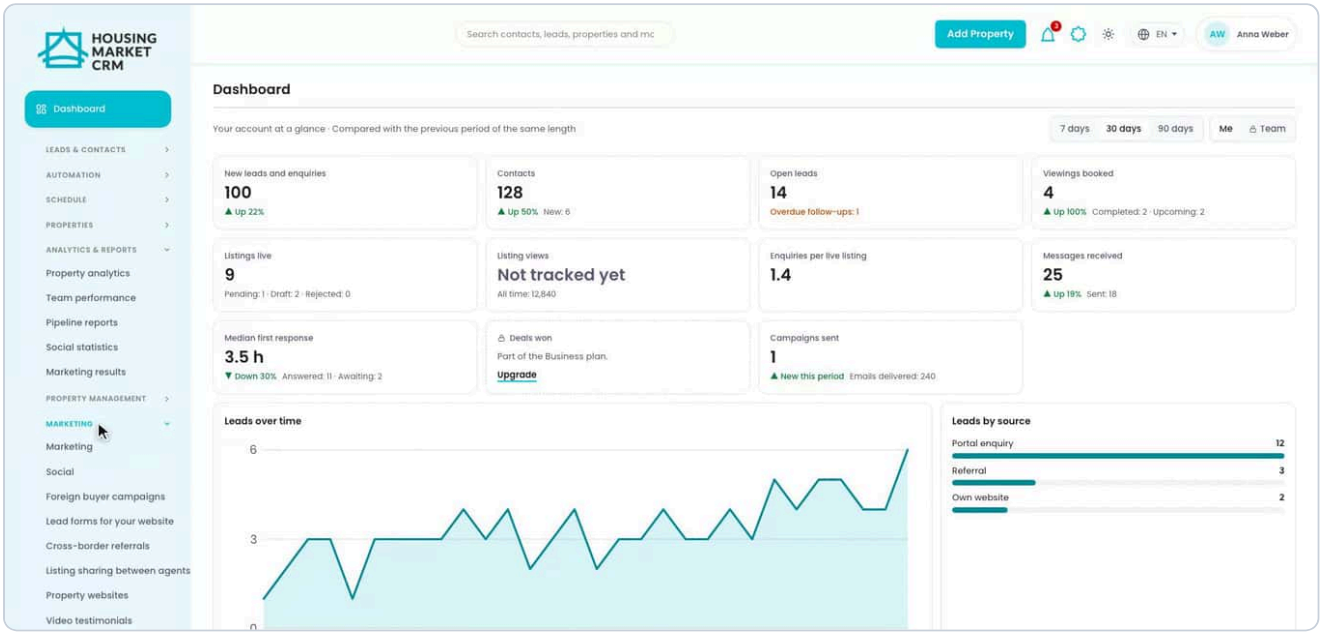


Figure 147.2 · Screen recorded 4 November 2026

3 Click **Marketing**.

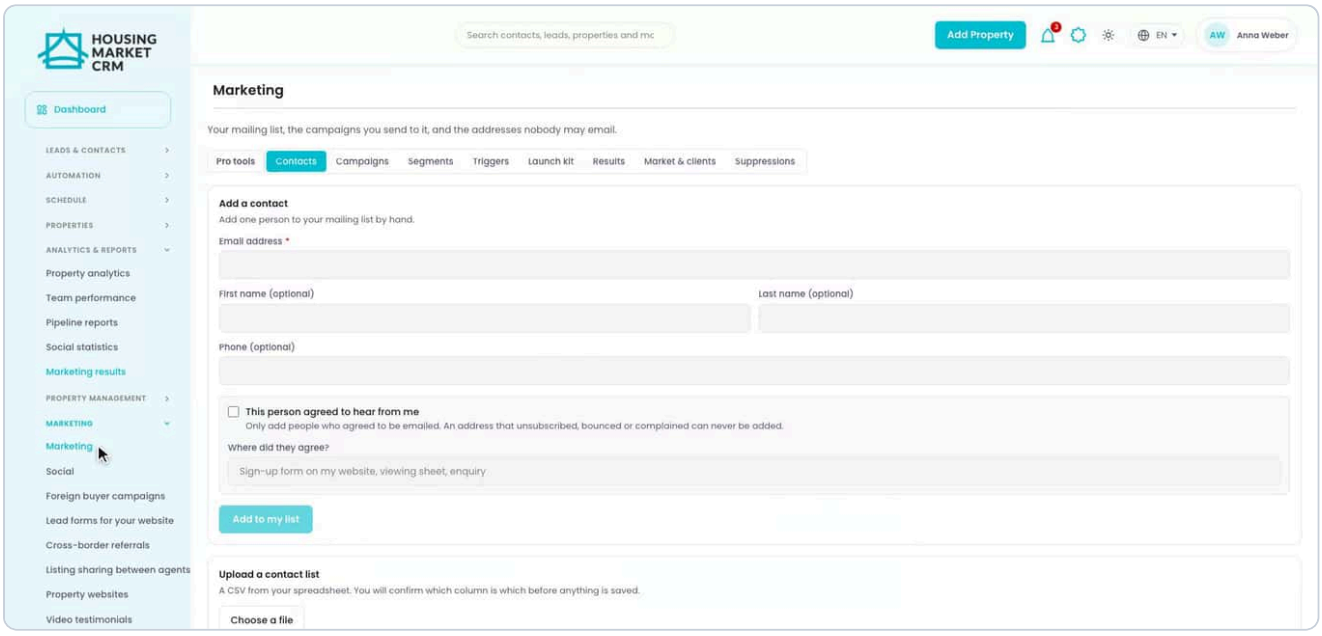


Figure 147.3 · Screen recorded 4 November 2026

4 Open the **Market & clients** tab.

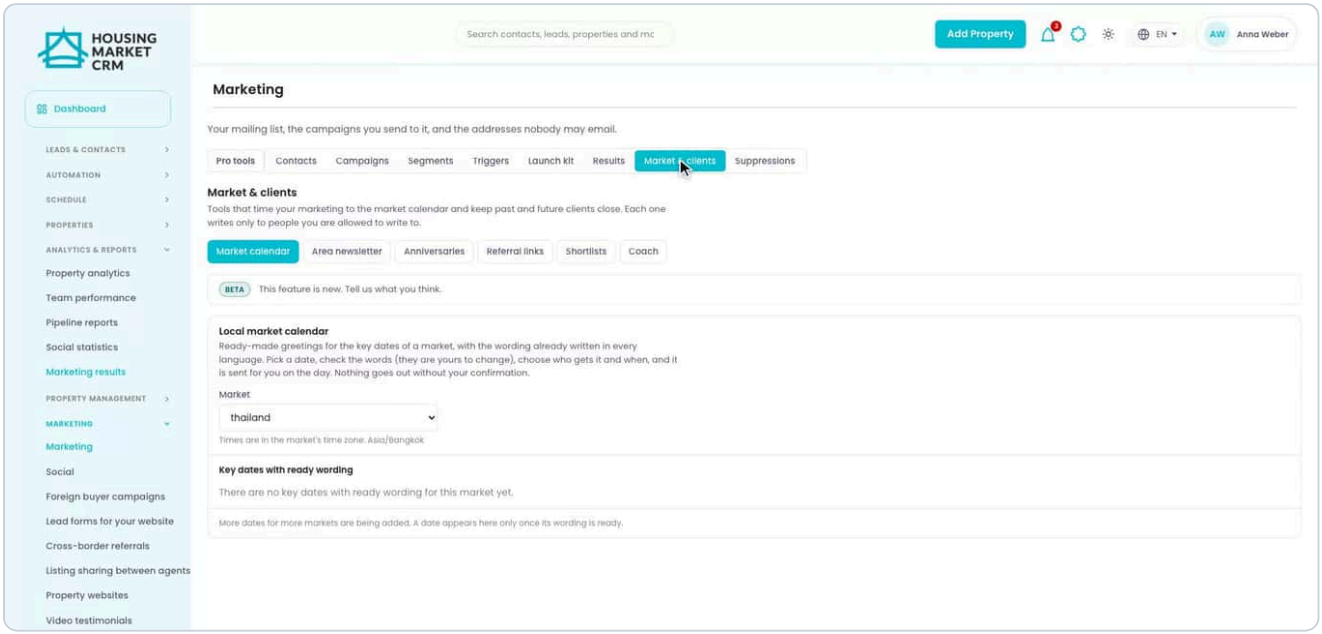


Figure 147.4 · Screen recorded 4 November 2026

5 Click **Anniversaries**.

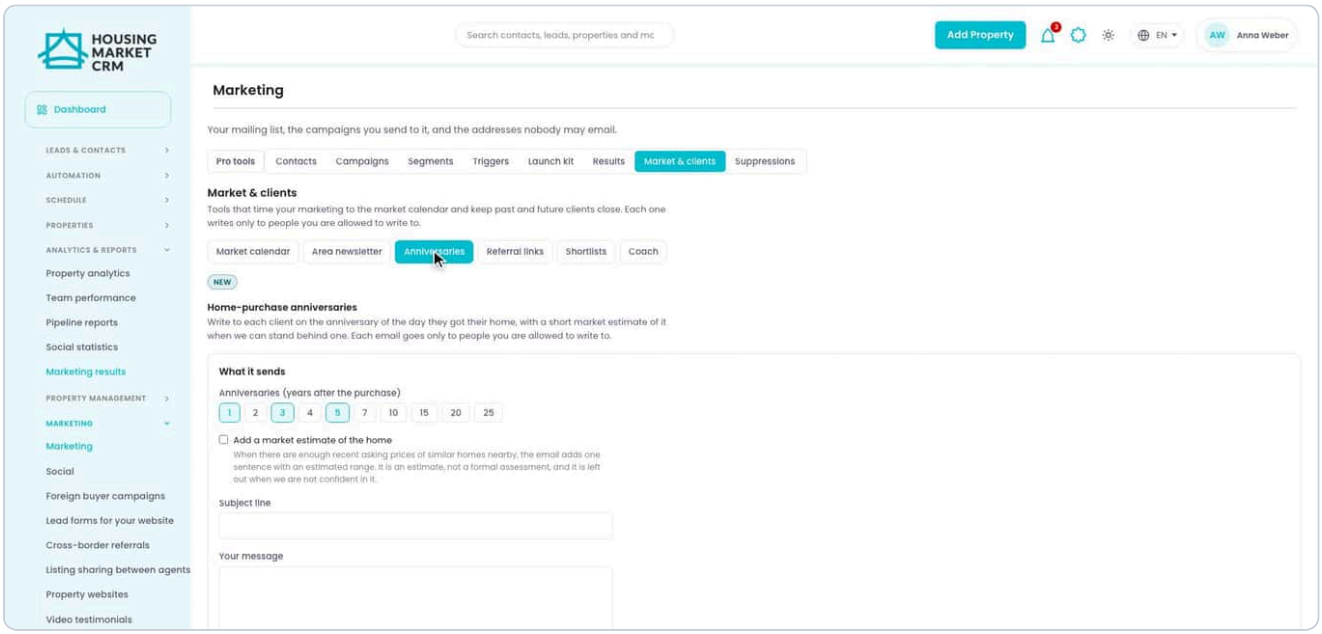


Figure 147.5 · Screen recorded 4 November 2026

6 Write to each client on the **anniversary of the day they got their home**.

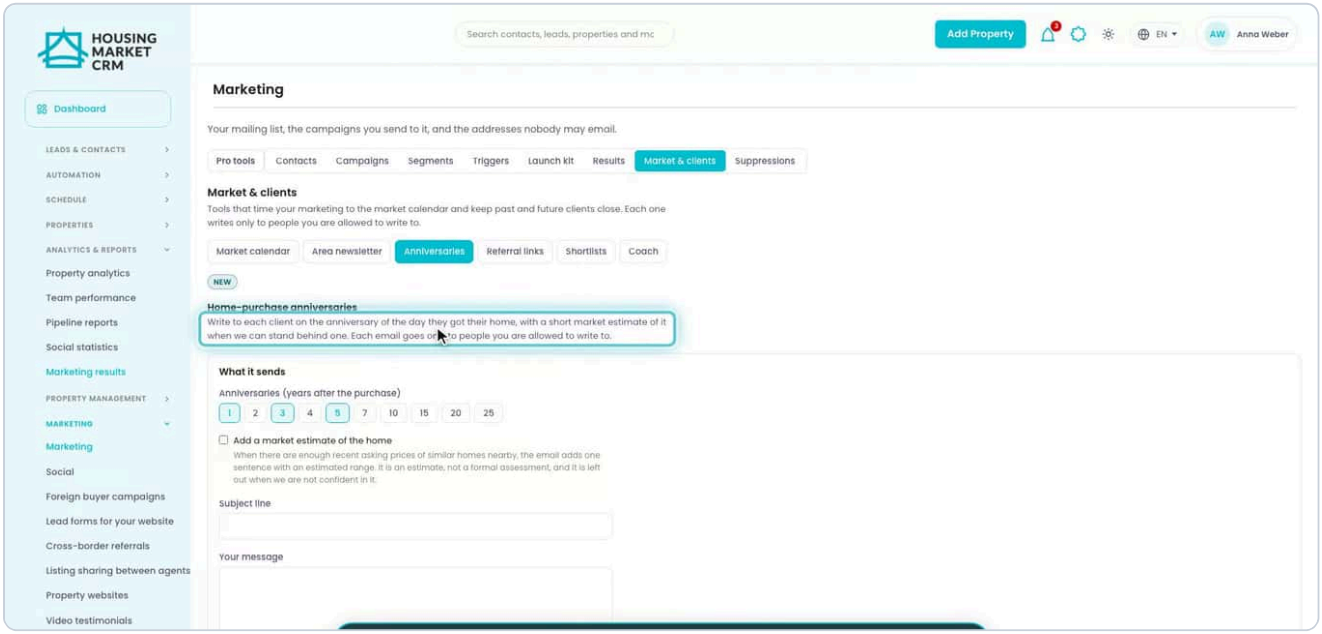


Figure 147.6 · Screen recorded 4 November 2026

7 Choose **which anniversaries**: 1, 3 and 5 years are ticked.

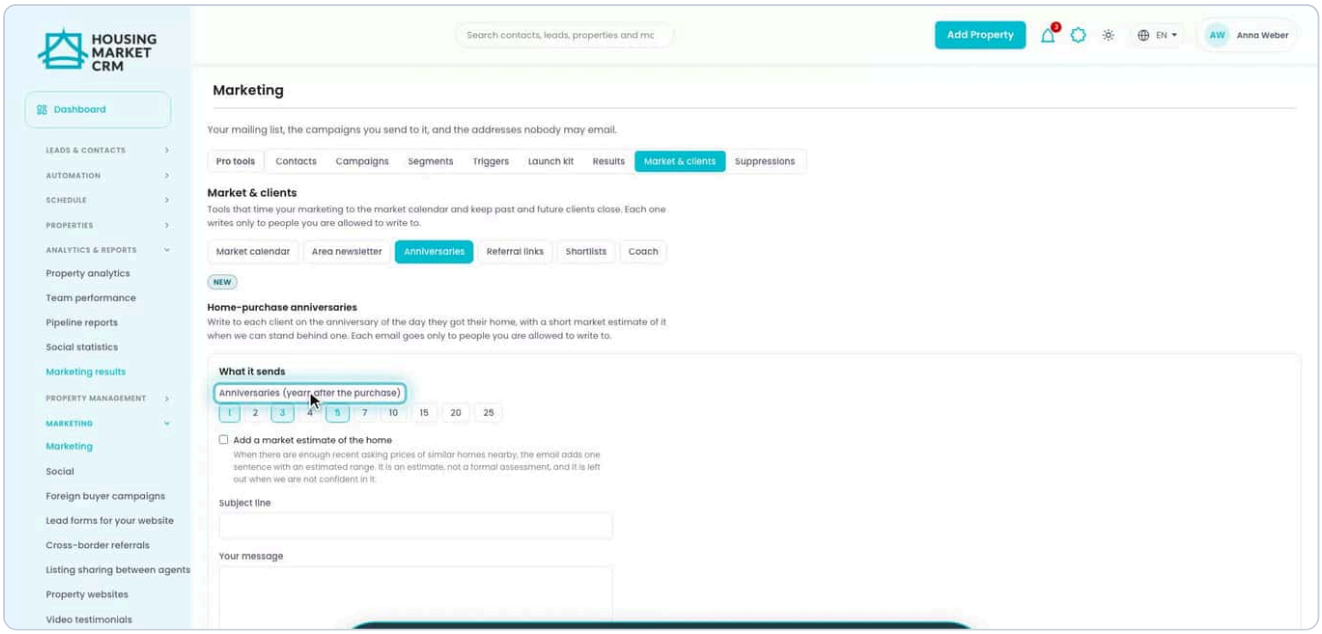


Figure 147.7 · Screen recorded 4 November 2026

8 Click **Fill in an example**, then write it in **your own words**.

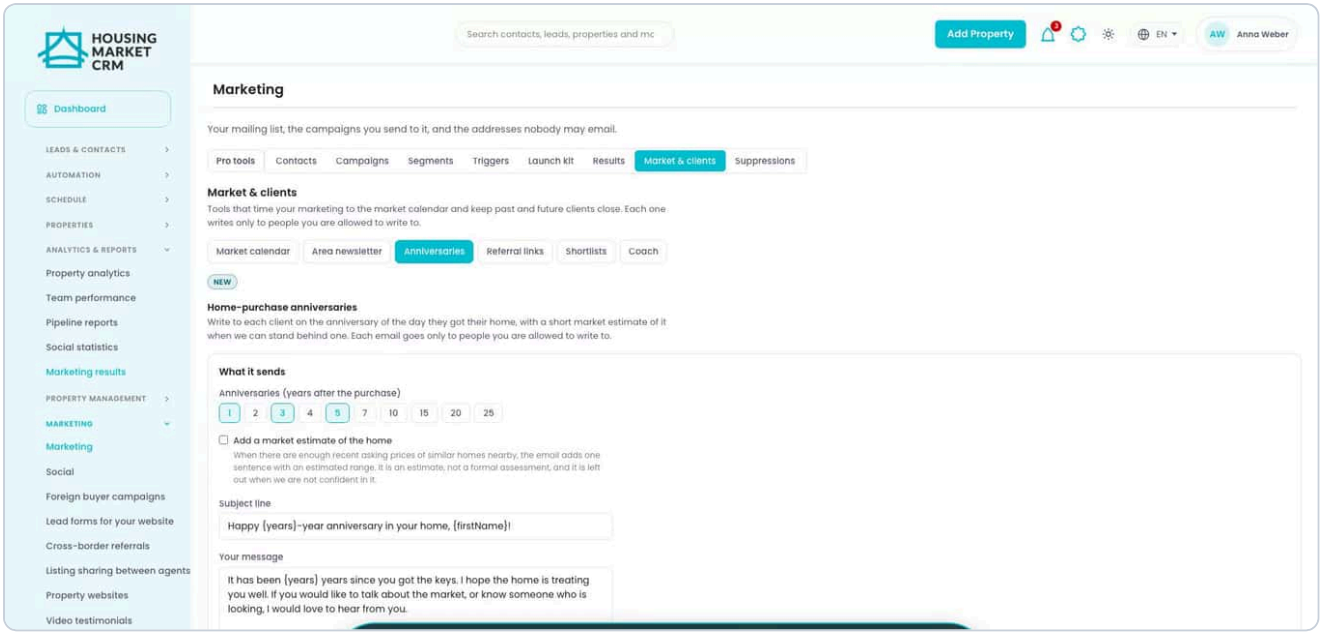


Figure 147.8 · Screen recorded 4 November 2026

9 You can add a **market estimate**, only when we can stand behind one.

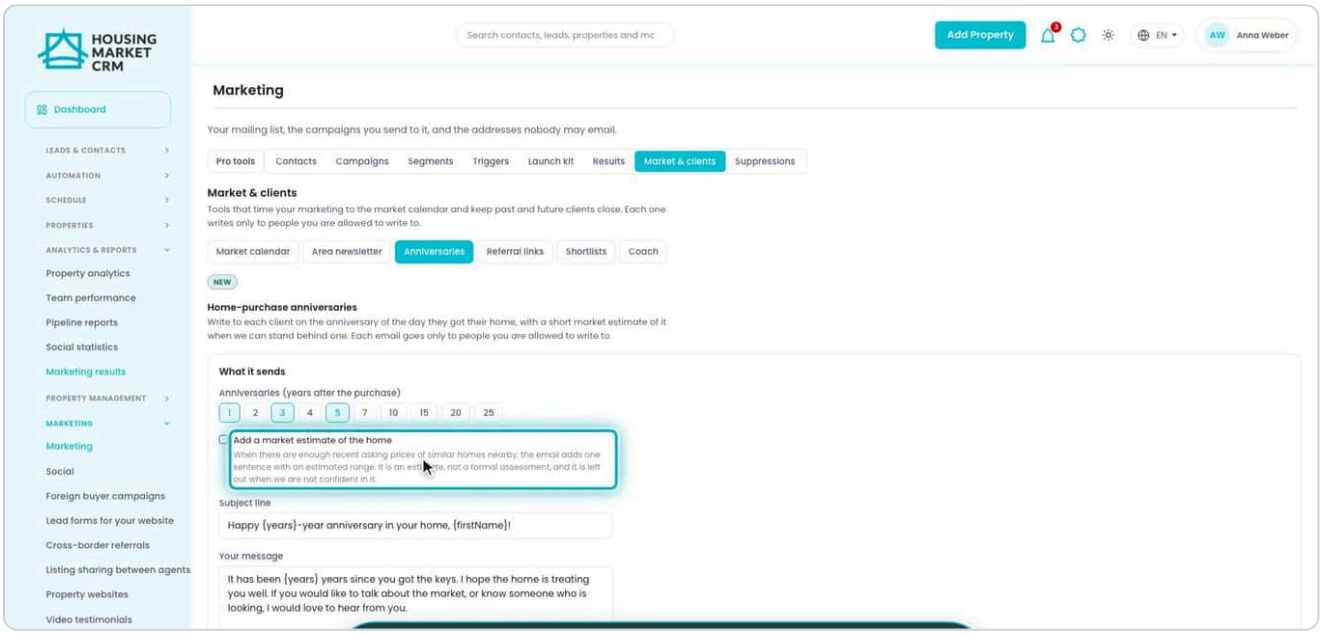


Figure 147.9 · Screen recorded 4 November 2026

10 Click **Create**.

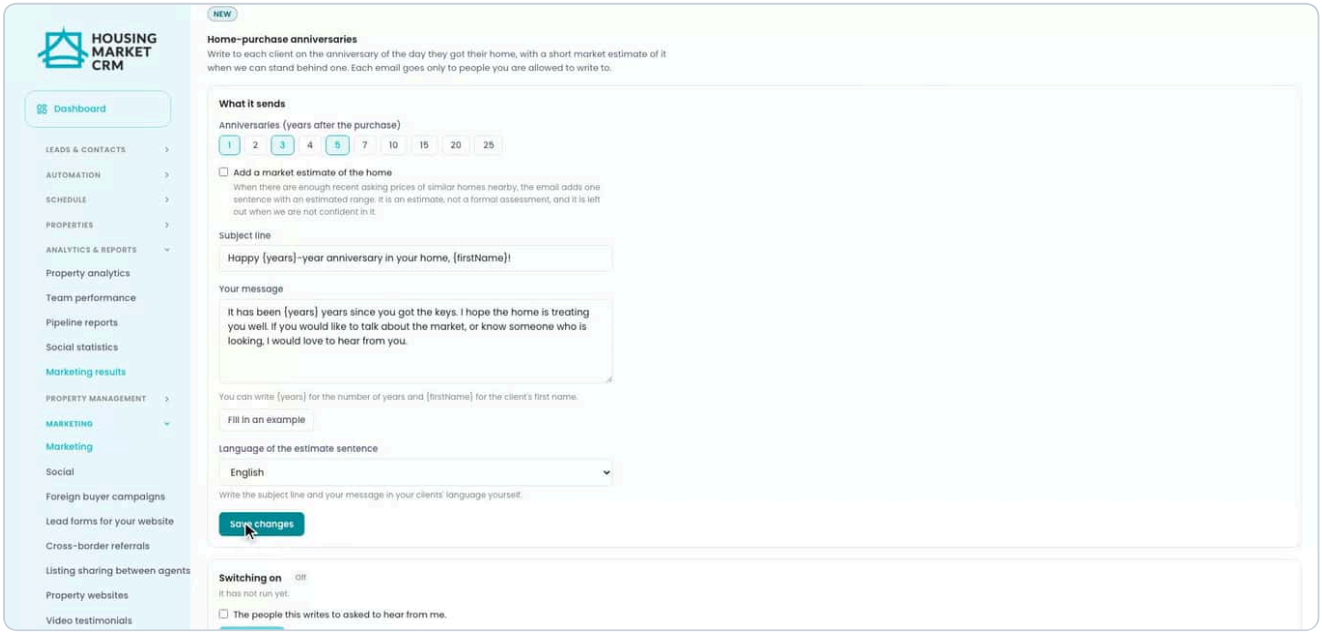


Figure 147.10 · Screen recorded 4 November 2026

11 **Nothing is sent** until you switch it on.

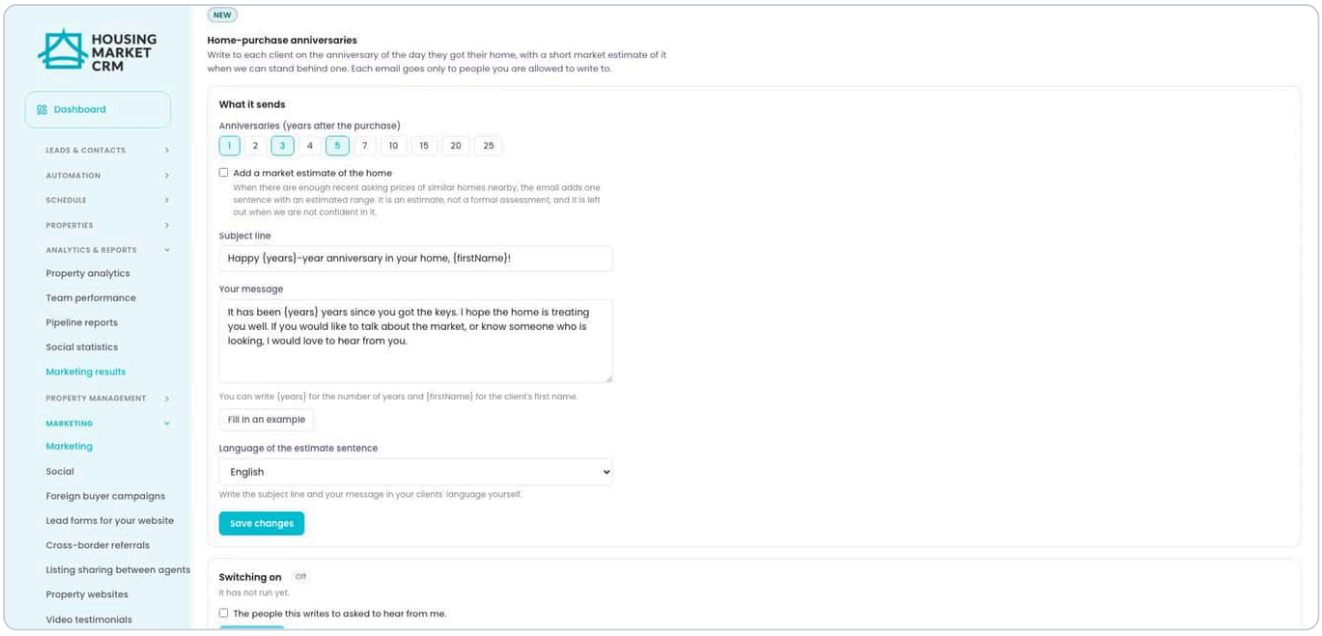


Figure 147.11 · Screen recorded 4 November 2026

12 Confirm the people it writes to **asked to hear from you**.

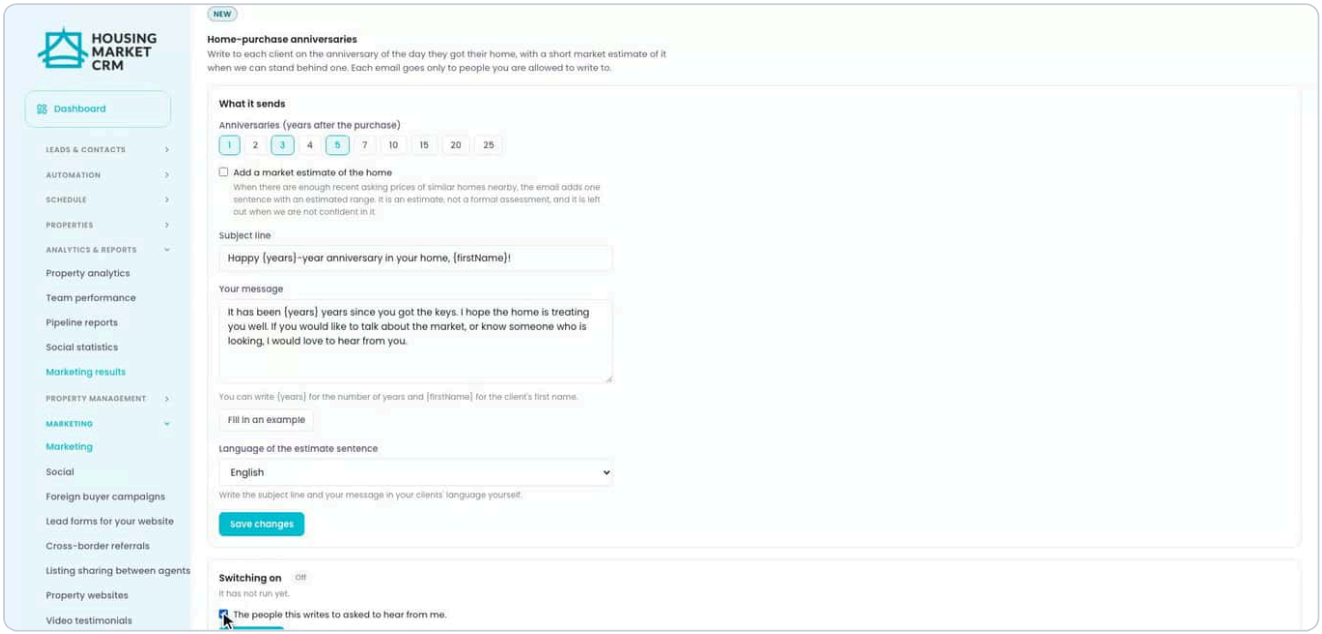


Figure 147.12 · Screen recorded 4 November 2026

13 First, **check what it would do now**.

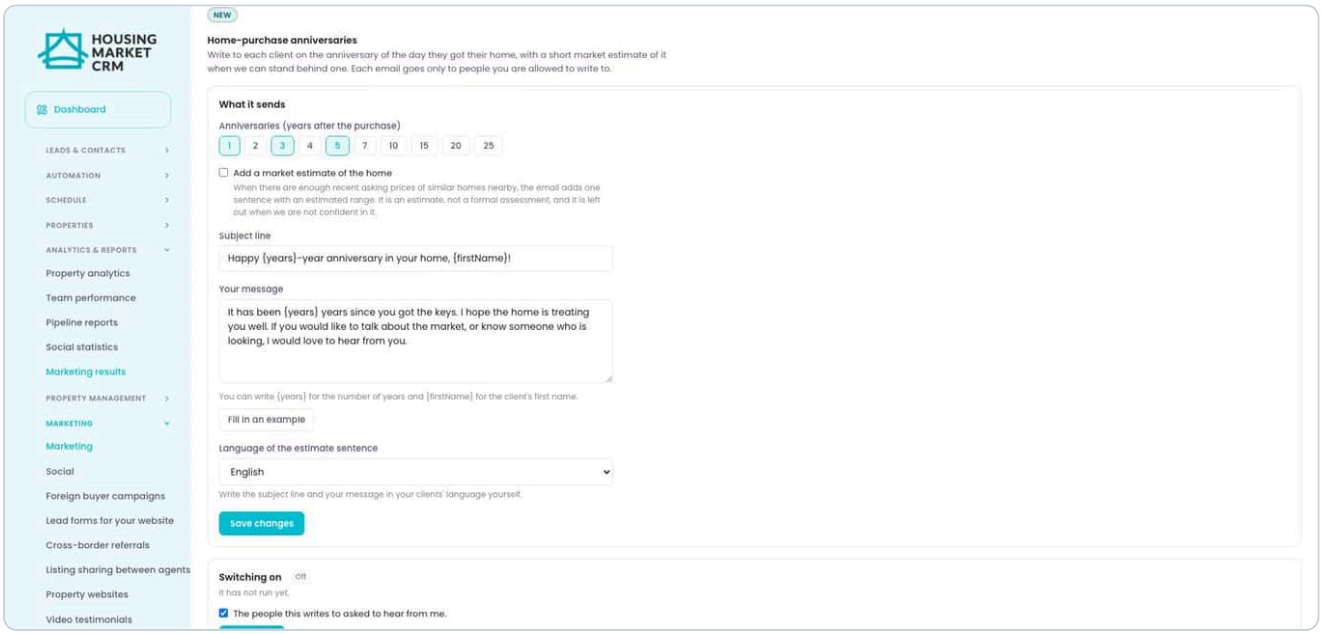


Figure 147.13 · Screen recorded 4 November 2026

14 The check **sends nothing**.

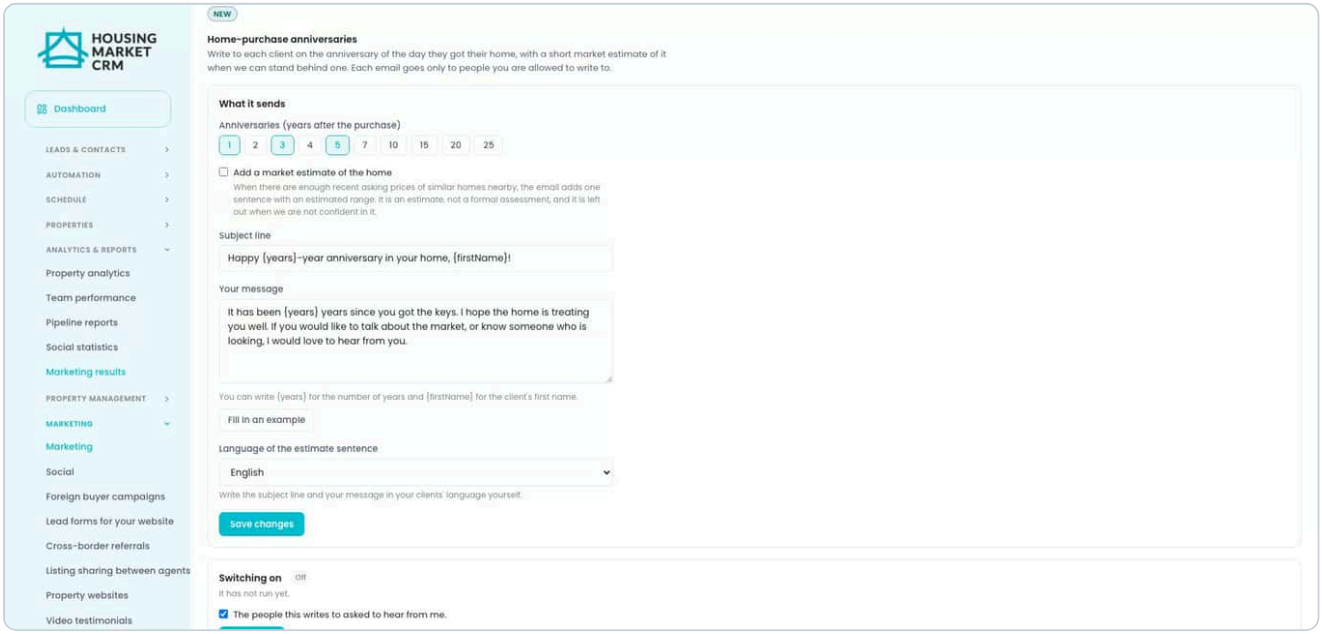


Figure 147.14 · Screen recorded 4 November 2026

15 Click **Switch on**.

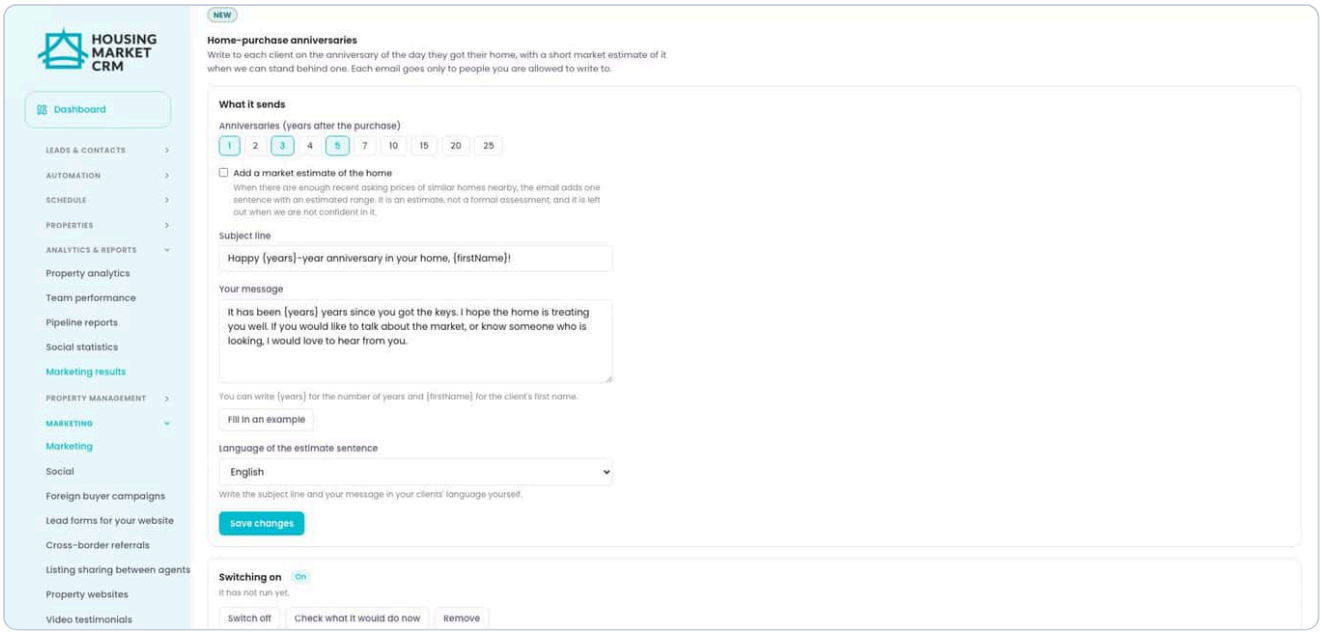


Figure 147.15 · Screen recorded 4 November 2026

16 **Coming up** lists the next 31 days.

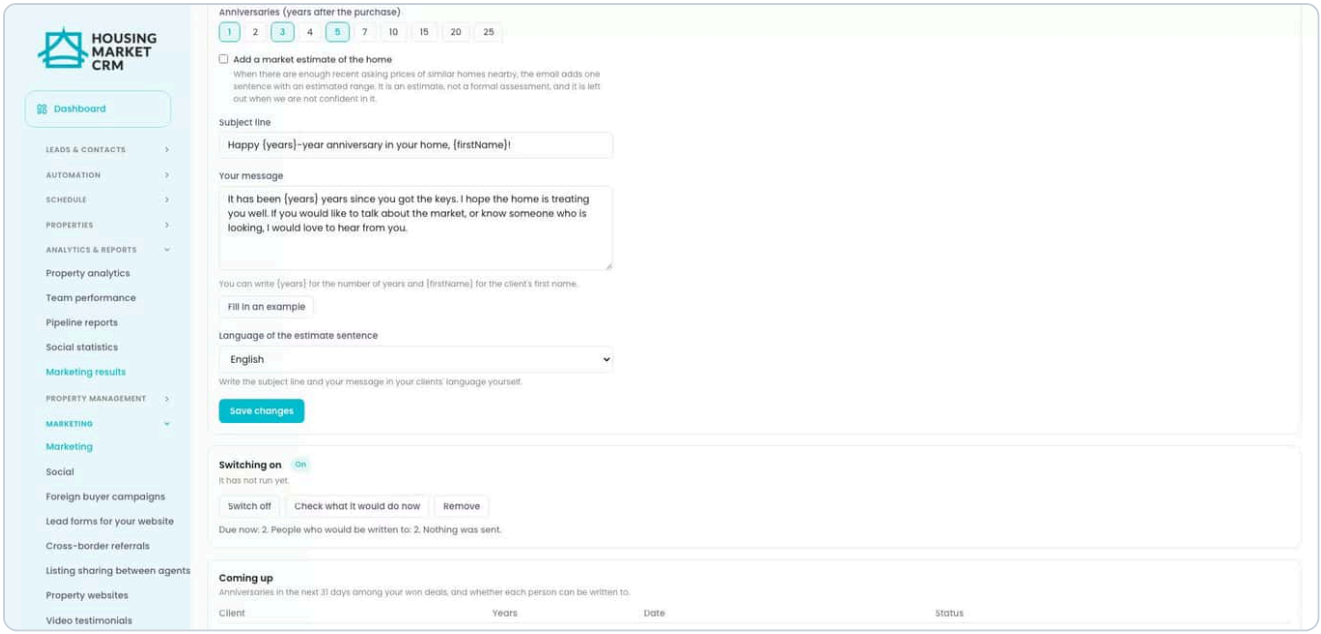


Figure 147.16 · Screen recorded 4 November 2026

17 It shows whether each person **will get an email** or why **not**. No address is ever shown.

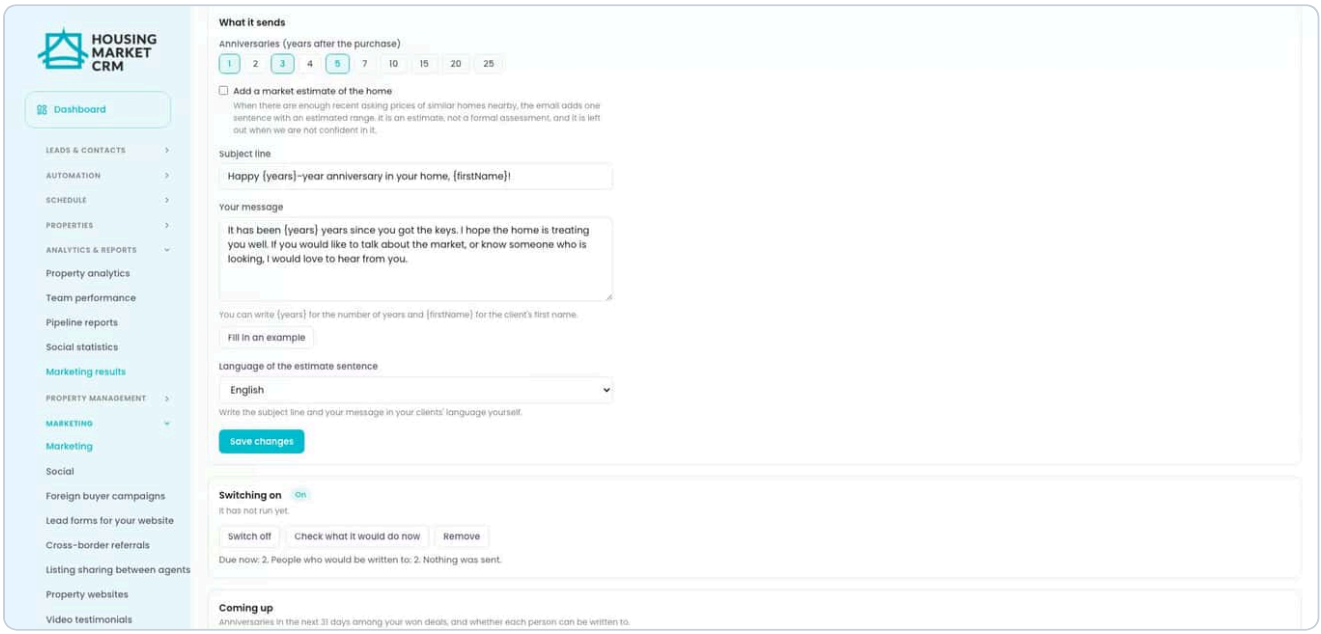


Figure 147.17 · Screen recorded 4 November 2026

18 Now open **Referral links**.

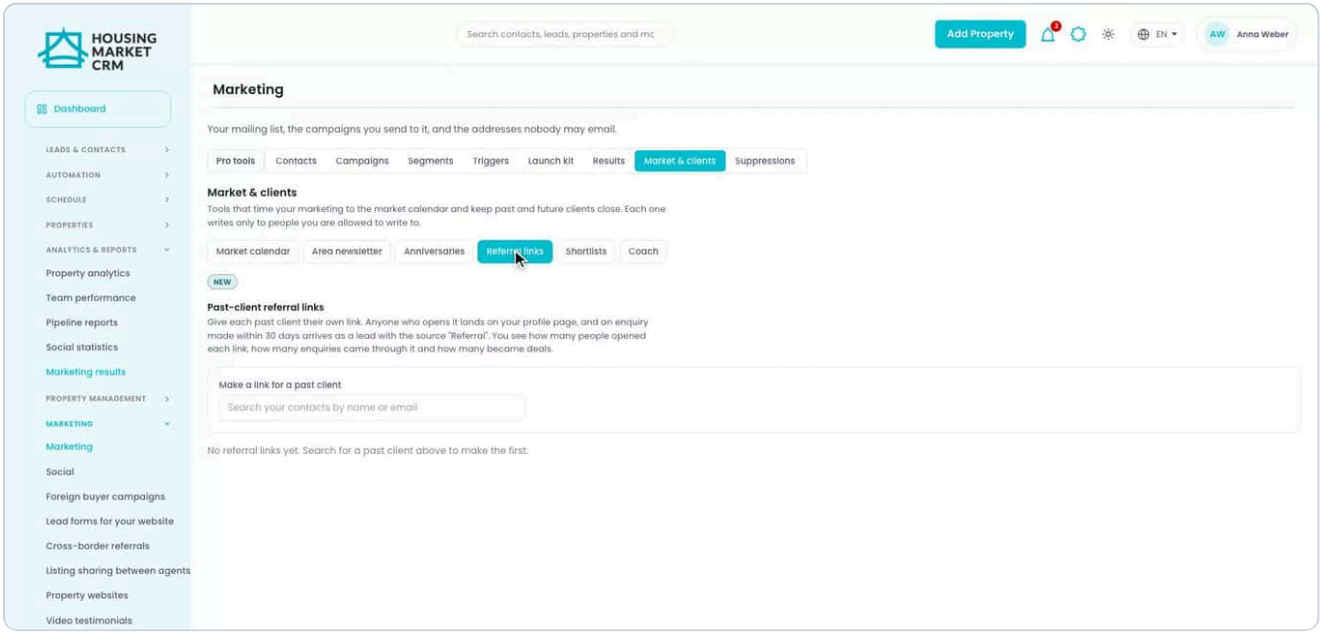


Figure 147.18 · Screen recorded 4 November 2026

19 Give each past client **their own link**.

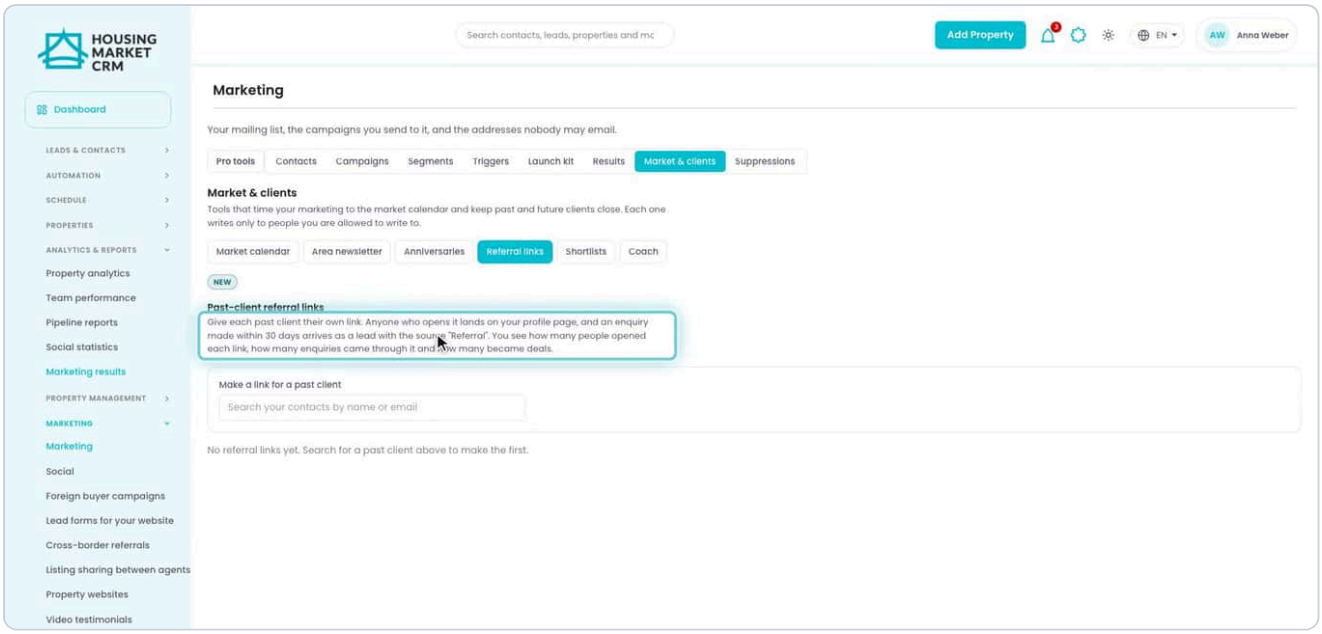


Figure 147.19 · Screen recorded 4 November 2026

20 Search for a **past client**.

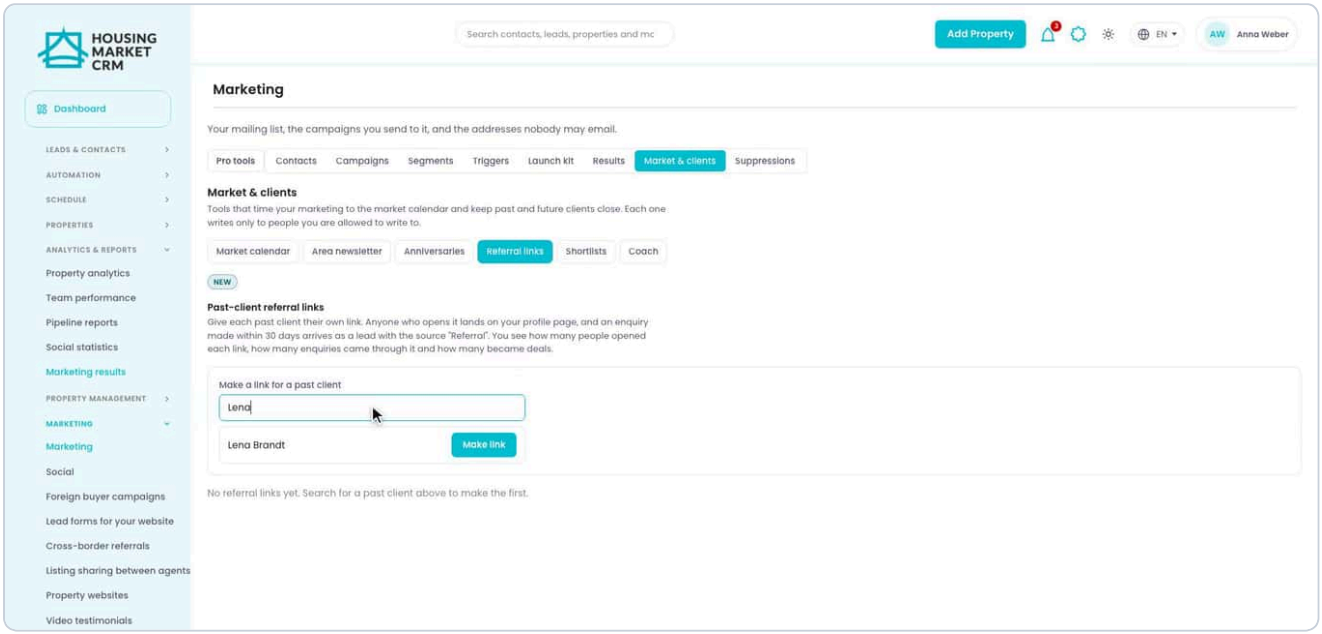


Figure 147.20 · Screen recorded 4 November 2026

21 Click **Make link**.

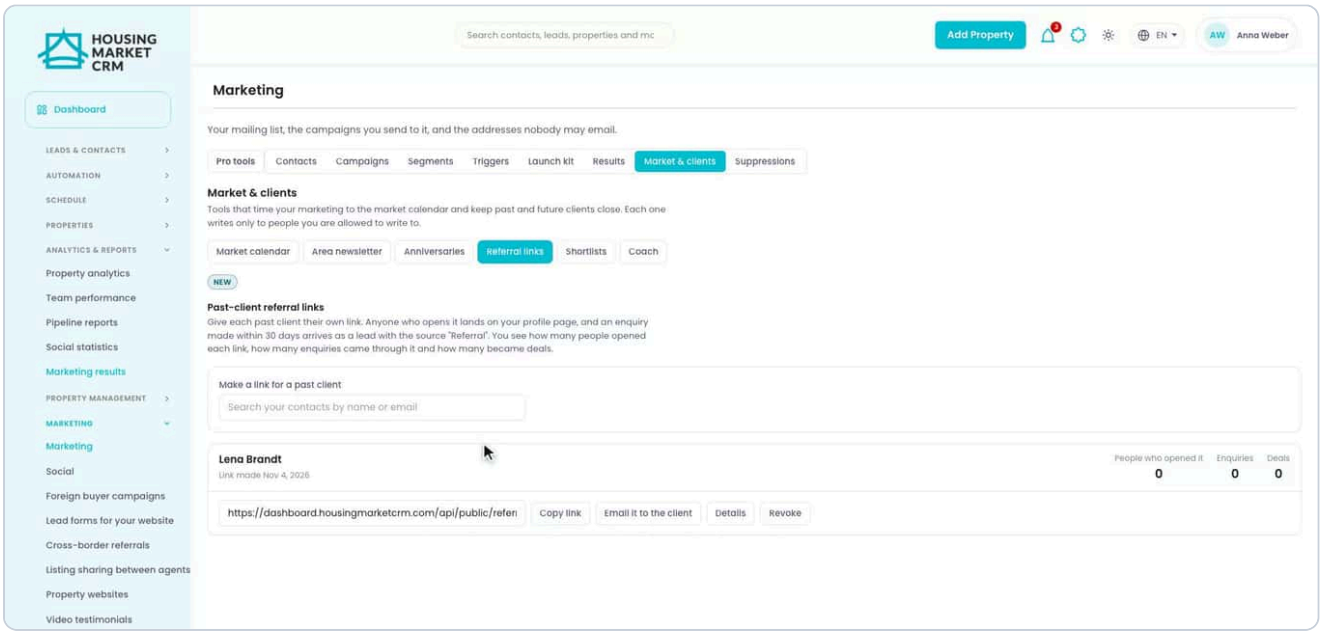


Figure 147.21 · Screen recorded 4 November 2026

22 Here is **their link**. Send it, or print it.

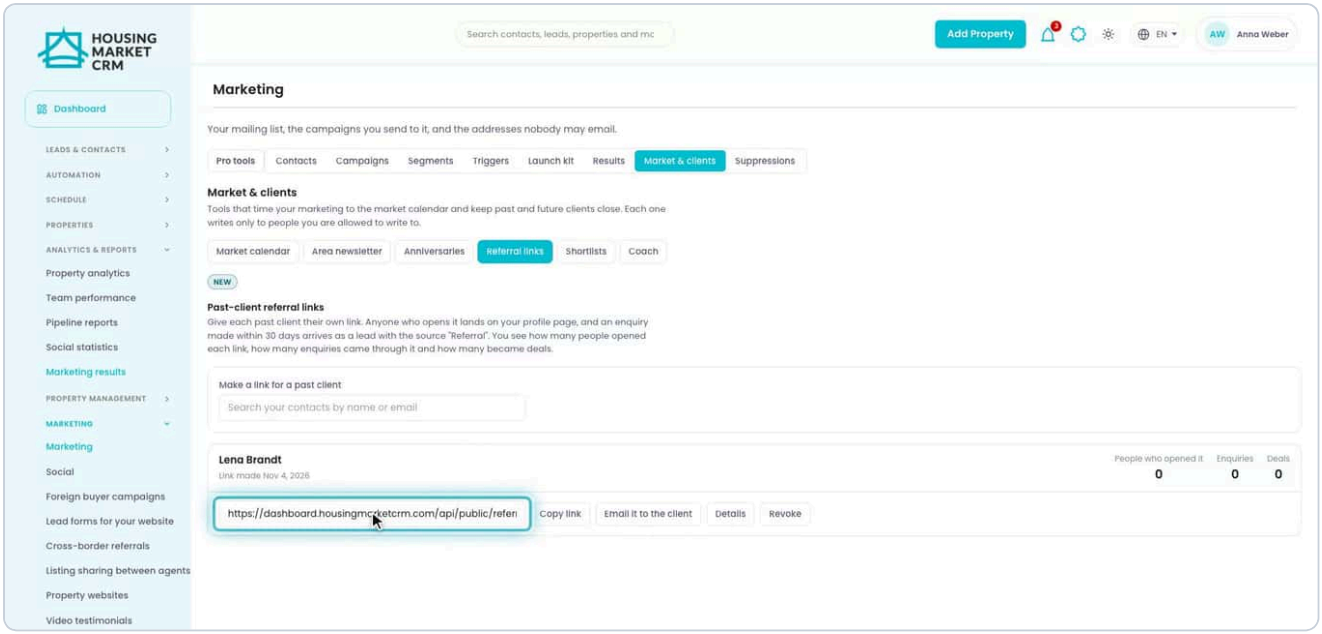


Figure 147.22 · Screen recorded 4 November 2026

23 You see **who opened it**, the **enquiries** and the **deals**.

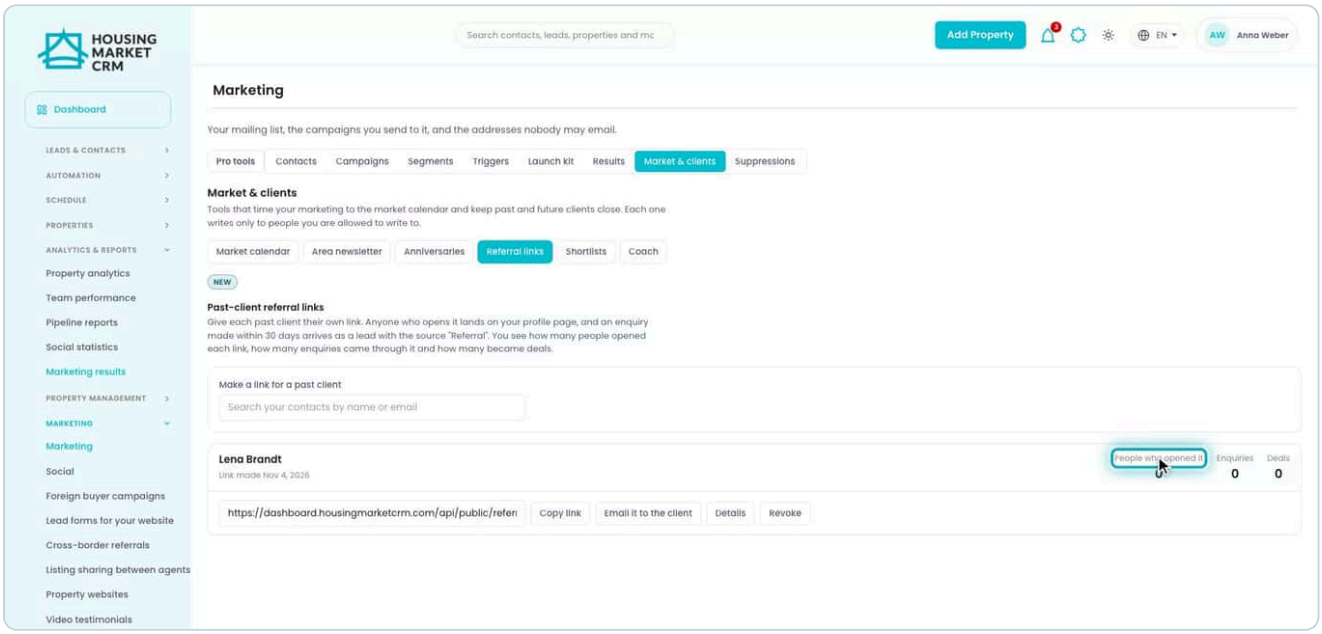


Figure 147.23 · Screen recorded 4 November 2026

24 An enquiry within **30 days** arrives as a lead with the source **Referral**.

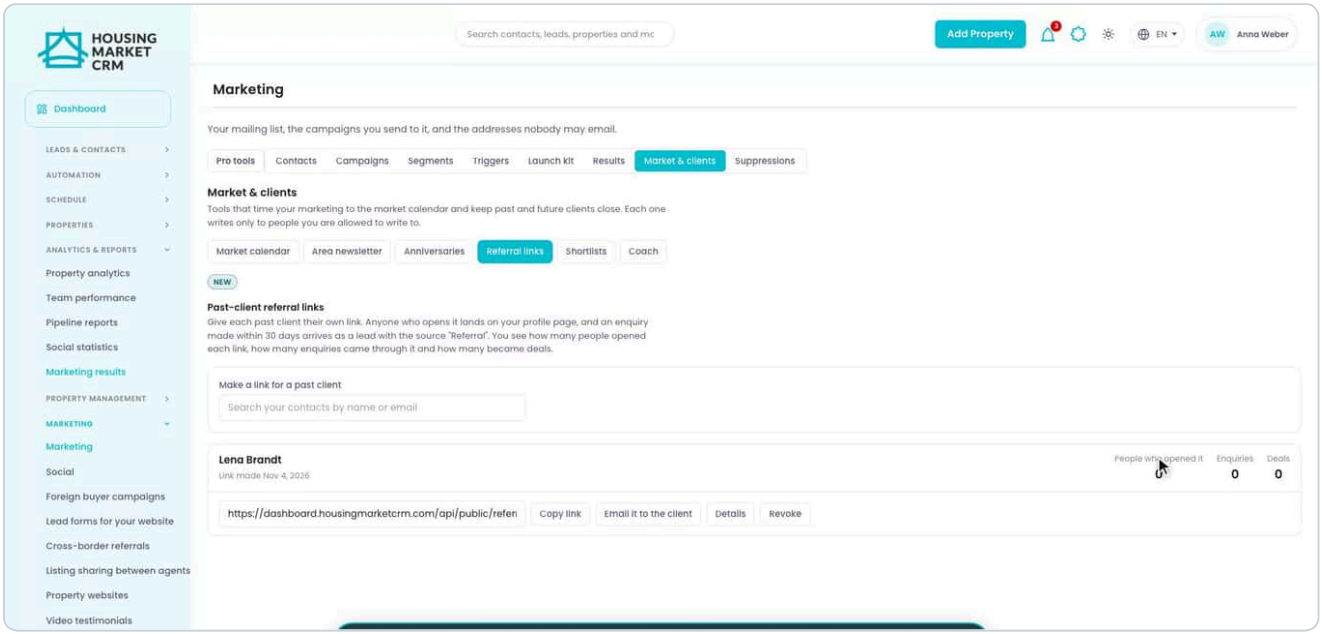


Figure 147.24 · Screen recorded 4 November 2026

148 CHAPTER 148

Pro tools: coach and client shortlists

Pro and Business | For agents who want their properties on their own website | Watch the video

OVERVIEW

Under Marketing, Pro tools holds an AI writer, seller presentations, weekly seller reports and a marketing score for each listing. Market and clients adds a market calendar, an area newsletter, anniversary emails, referral links, shortlists and a daily coach.

The Pro marketing tools are part of the Pro and Business plans. On a Free plan the tools are shown as locked, with the way to upgrade. Under Marketing, choose Pro tools, and open the Market and clients tab for the second group.

Pro tools

- AI writer writes a draft in seconds: a listing description, an email about a property or the text of a seller presentation, in any of seventeen languages. Listing descriptions can be written only in the languages your portal publishes. The draft uses only the details you give it and the listing you choose, prices and street addresses are never sent to the writer, and nothing is stored. Read it and correct it before you use it.
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- Referral links gives each past client their own link. Anyone who opens it lands on your profile page, and an enquiry made within 30 days arrives as a lead with the source Referral. You see how many people opened each link, how many enquiries came through it and how many became deals.
- Shortlists puts some of your live homes behind one link that you send to a buyer. To open a home's page, the visitor gives you their name and email.
- Coach suggests three things worth doing today, picked from your own marketing. Nothing is sent for you.

Every email from these tools goes only to people you are allowed to write to, and each follows the same unsubscribe rules as your campaigns.

From the Help Center: **What are the Pro marketing tools?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

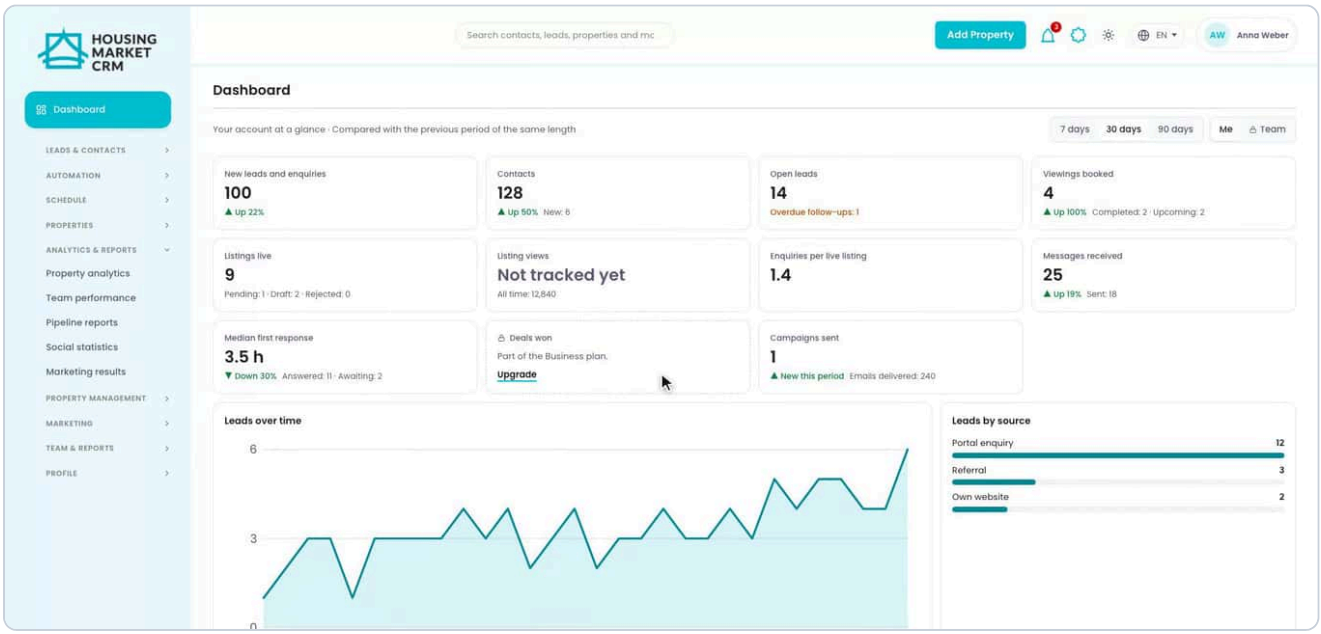


Figure 148.1 · Screen recorded 4 November 2026

2 Open **Marketing** in the left menu.

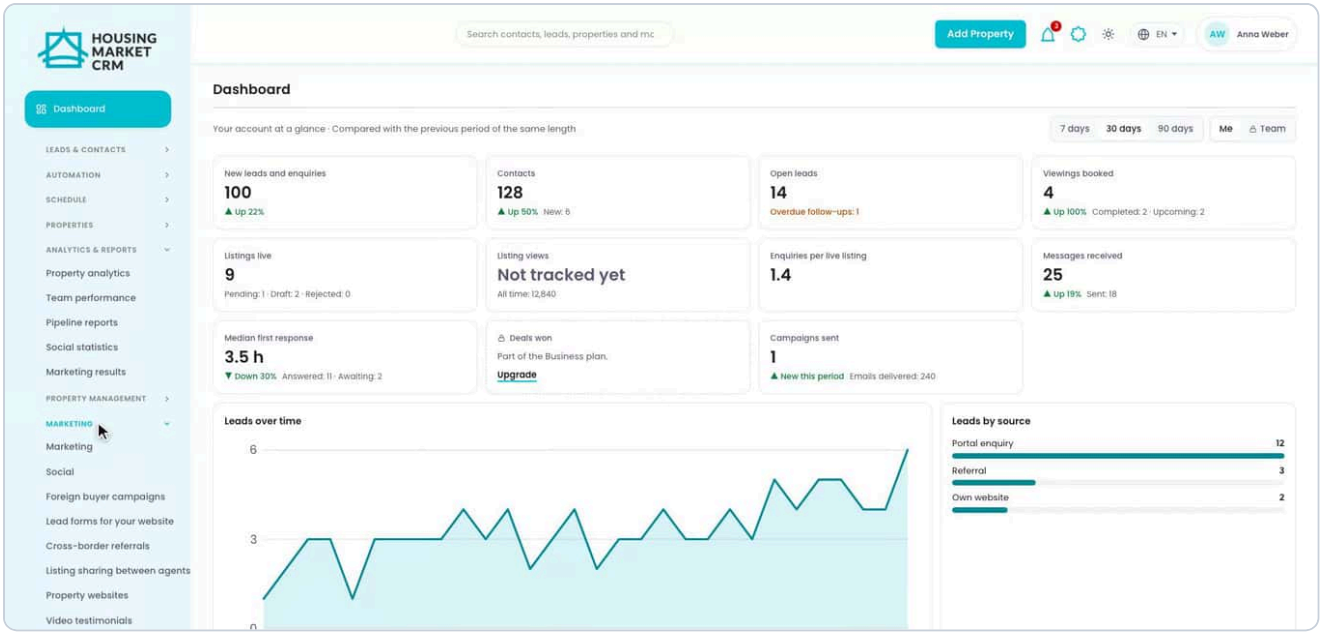


Figure 148.2 · Screen recorded 4 November 2026

3 Click **Marketing**.

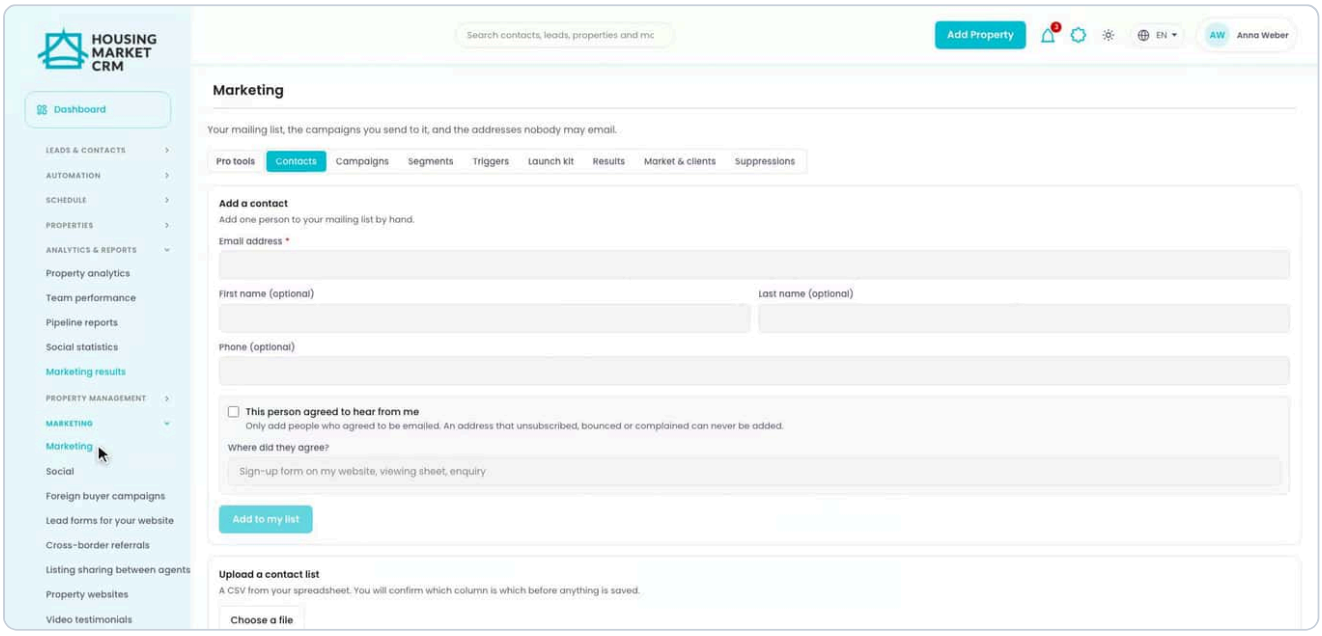


Figure 148.3 · Screen recorded 4 November 2026

4 Open the **Market & clients** tab.

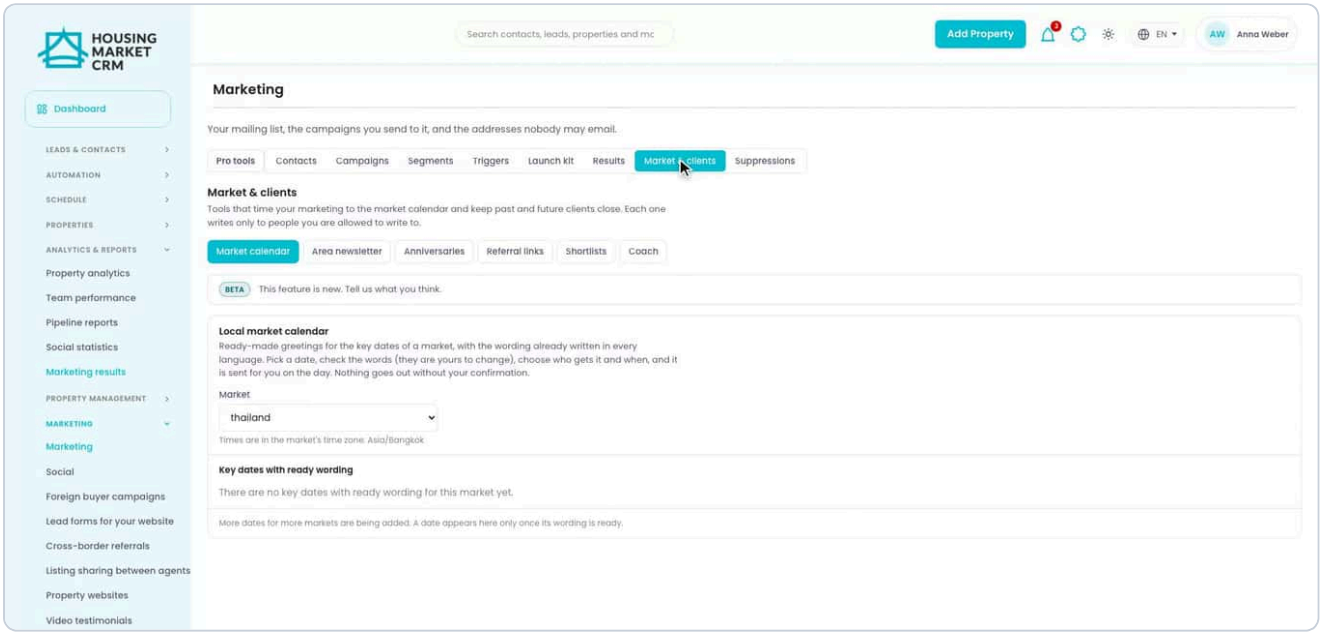


Figure 148.4 · Screen recorded 4 November 2026

5 Click **Coach**.

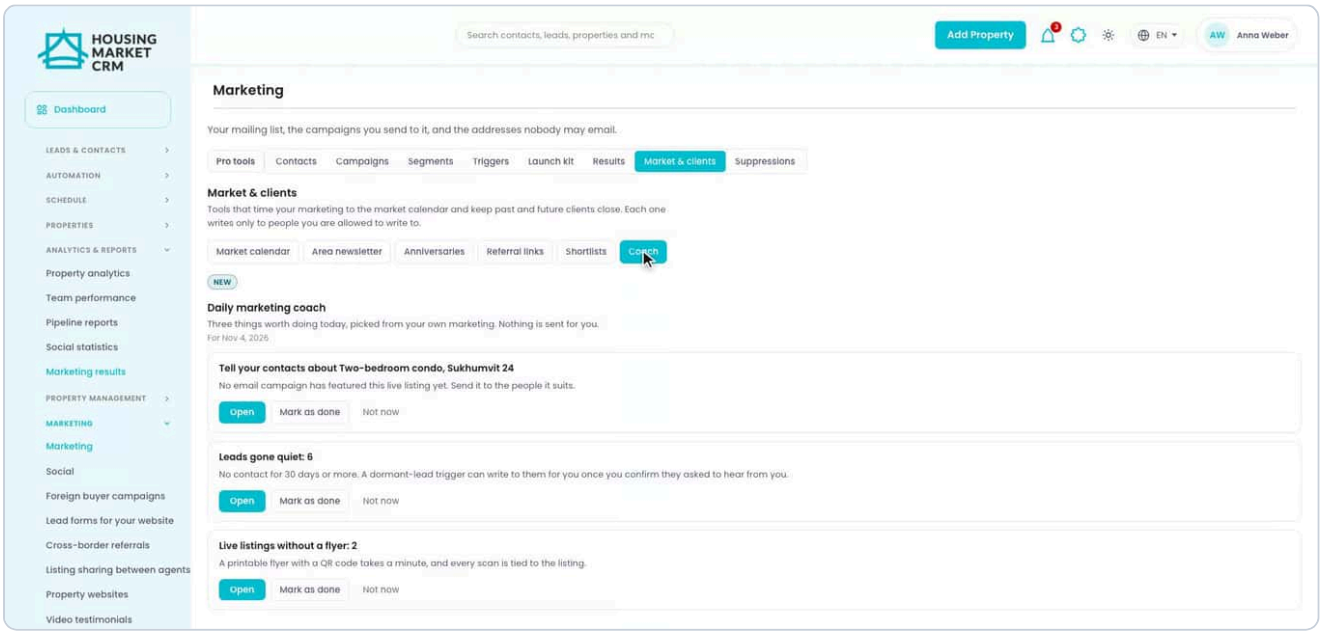


Figure 148.5 · Screen recorded 4 November 2026

6 **Three things** worth doing today, picked from your own marketing.

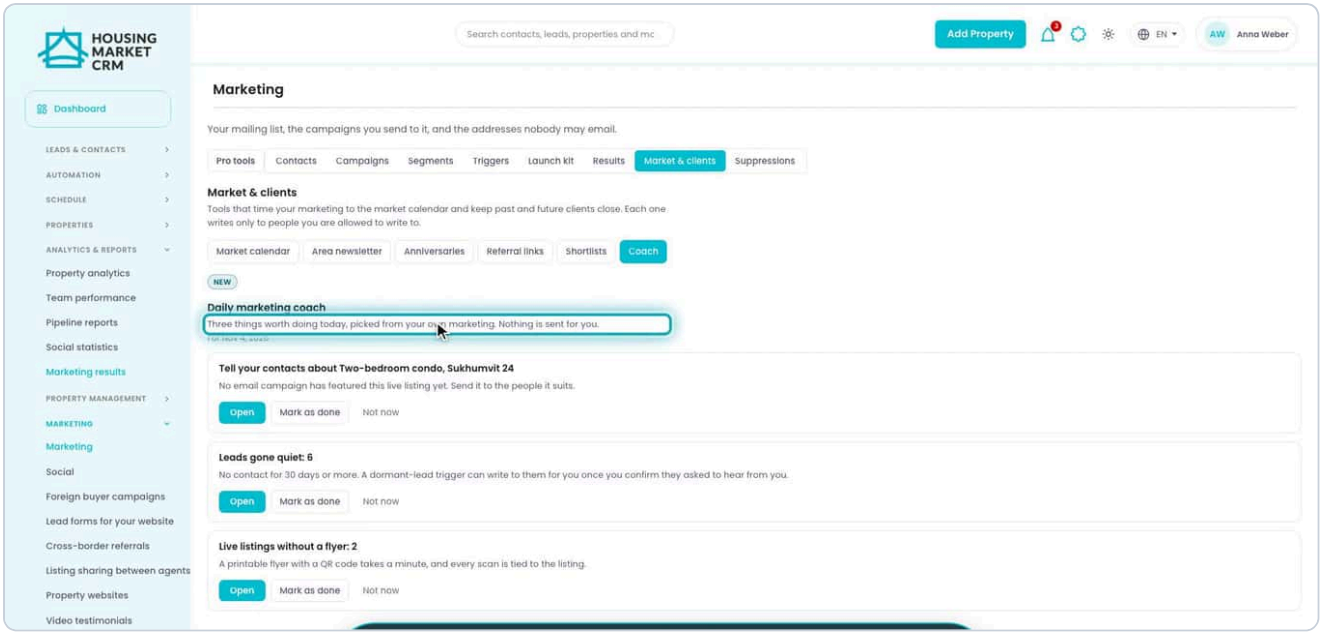


Figure 148.6 · Screen recorded 4 November 2026

7 **Nothing is sent for you**: you choose what to do.

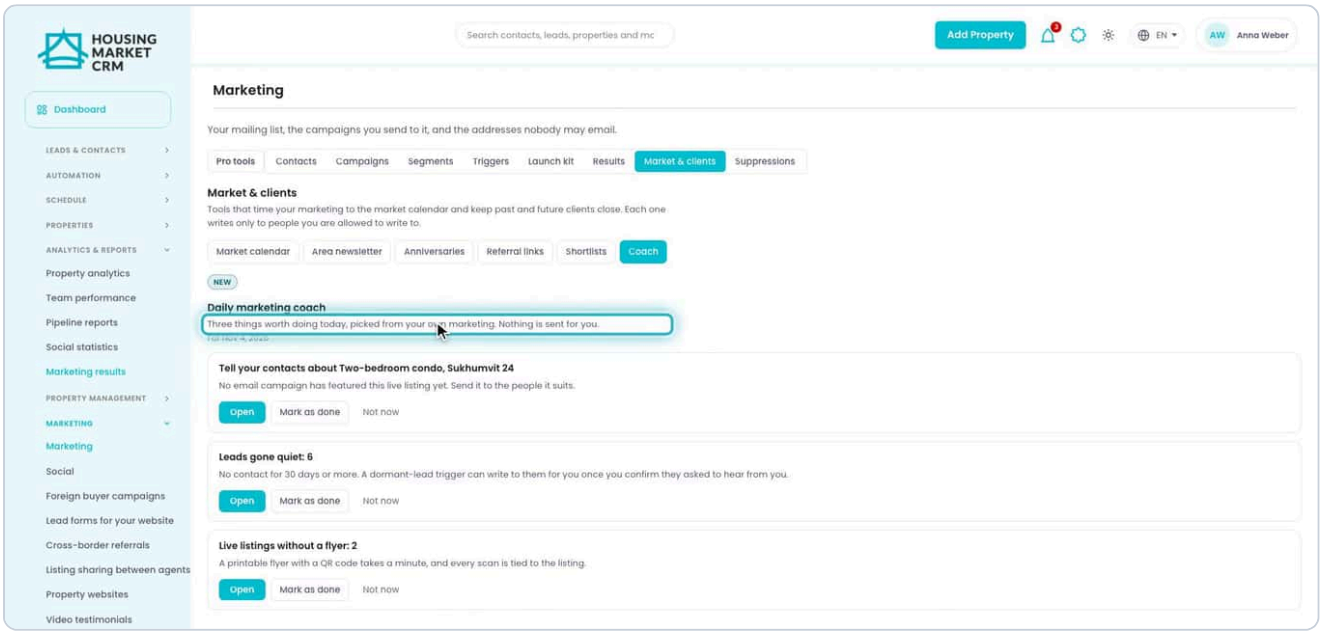


Figure 148.7 · Screen recorded 4 November 2026

8 Each suggestion says **why**.

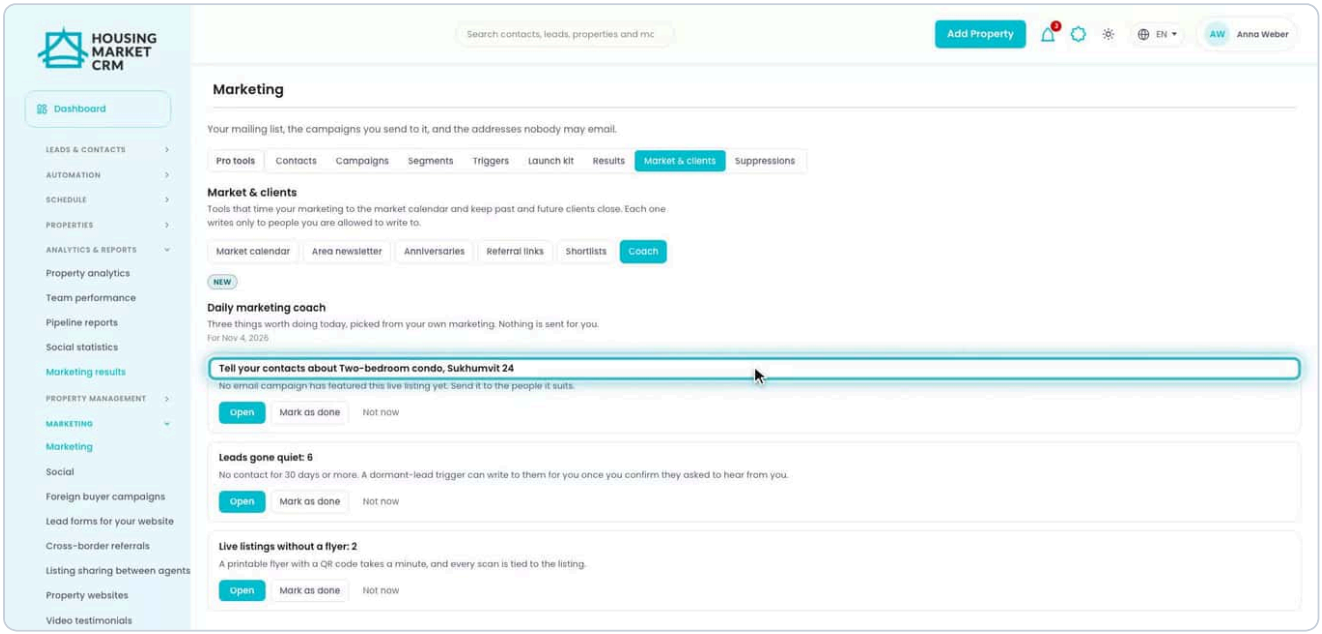


Figure 148.8 · Screen recorded 4 November 2026

9 Click **Mark as done** when you have acted on one or **Not now** to set one aside.

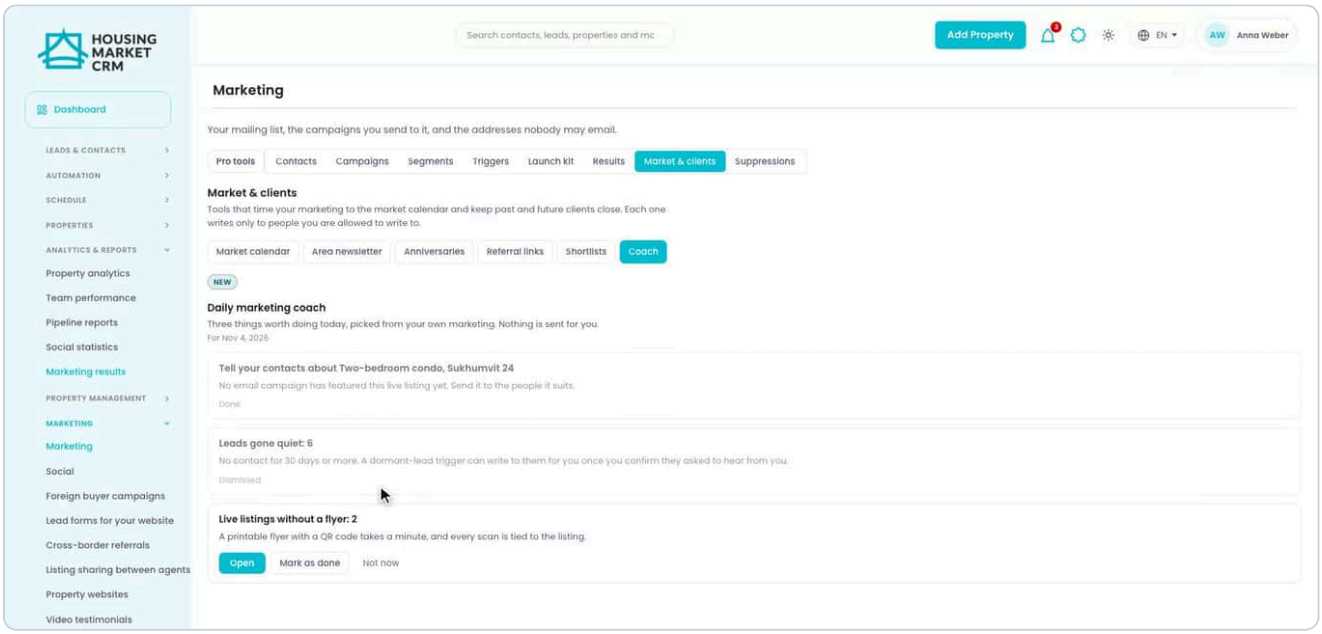


Figure 148.9 · Screen recorded 4 November 2026

10 Now open **Shortlists**.

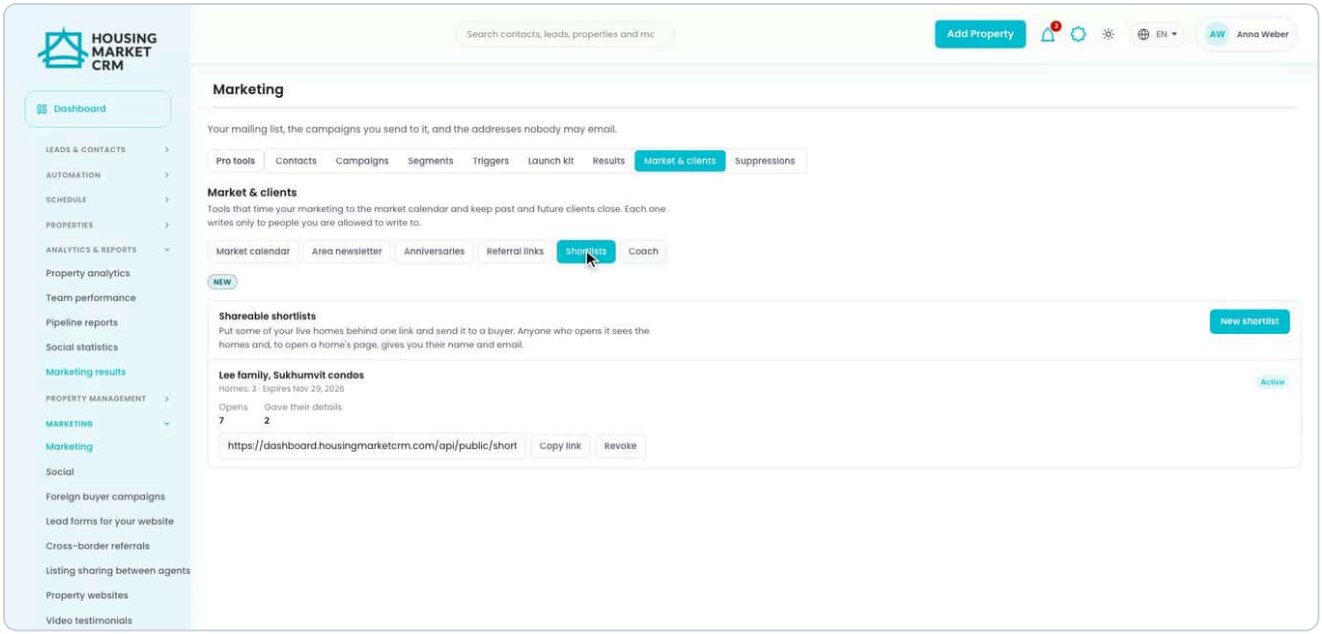


Figure 148.10 · Screen recorded 4 November 2026

11 Put **some of your live homes** behind **one link**.

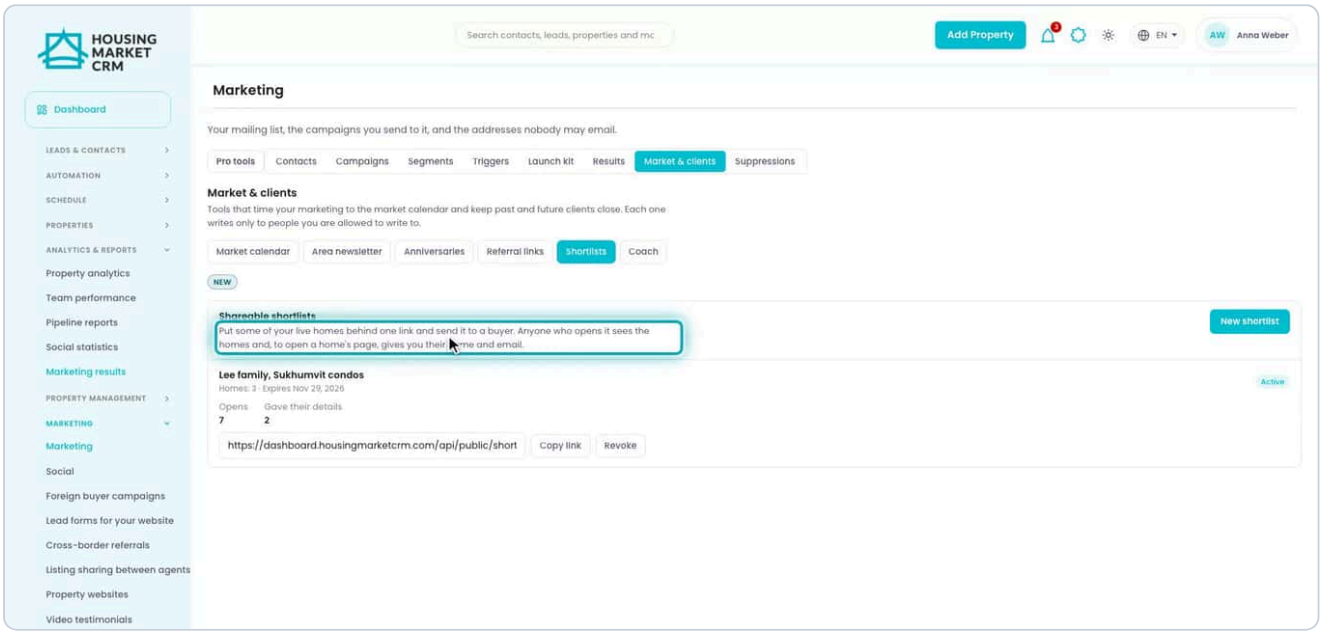


Figure 148.11 · Screen recorded 4 November 2026

12 Each shortlist shows how many people **opened** it and how many **gave their details**.

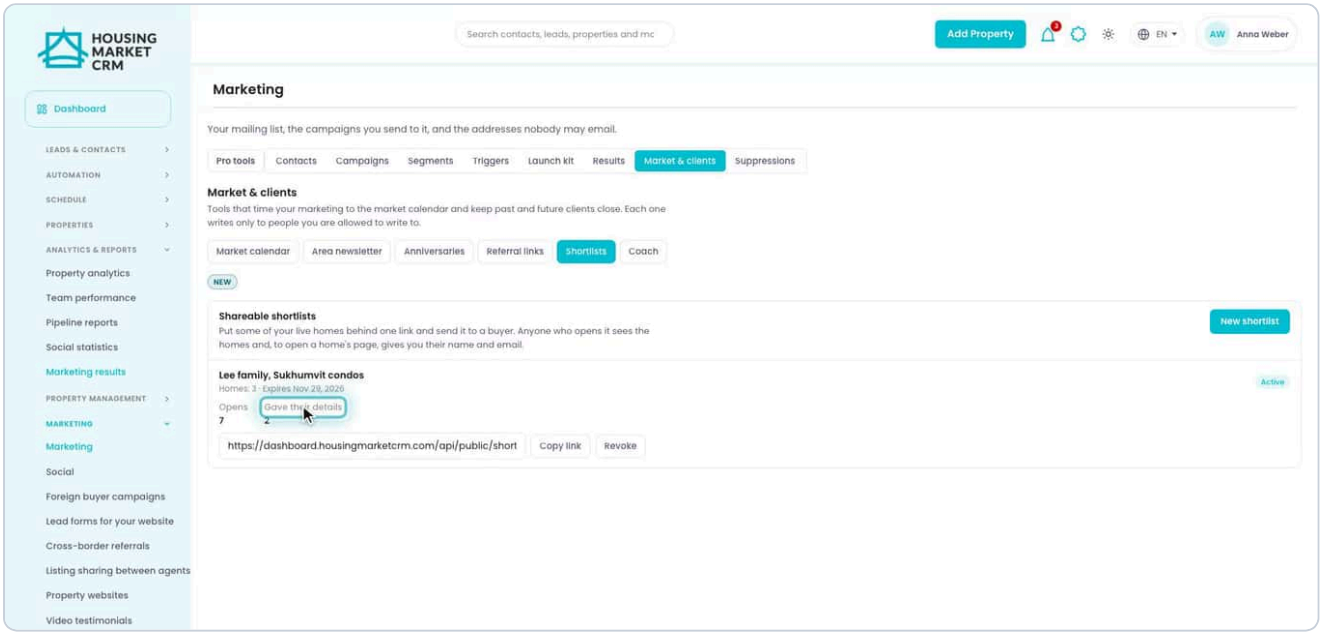


Figure 148.12 · Screen recorded 4 November 2026

13 Click **New shortlist**.

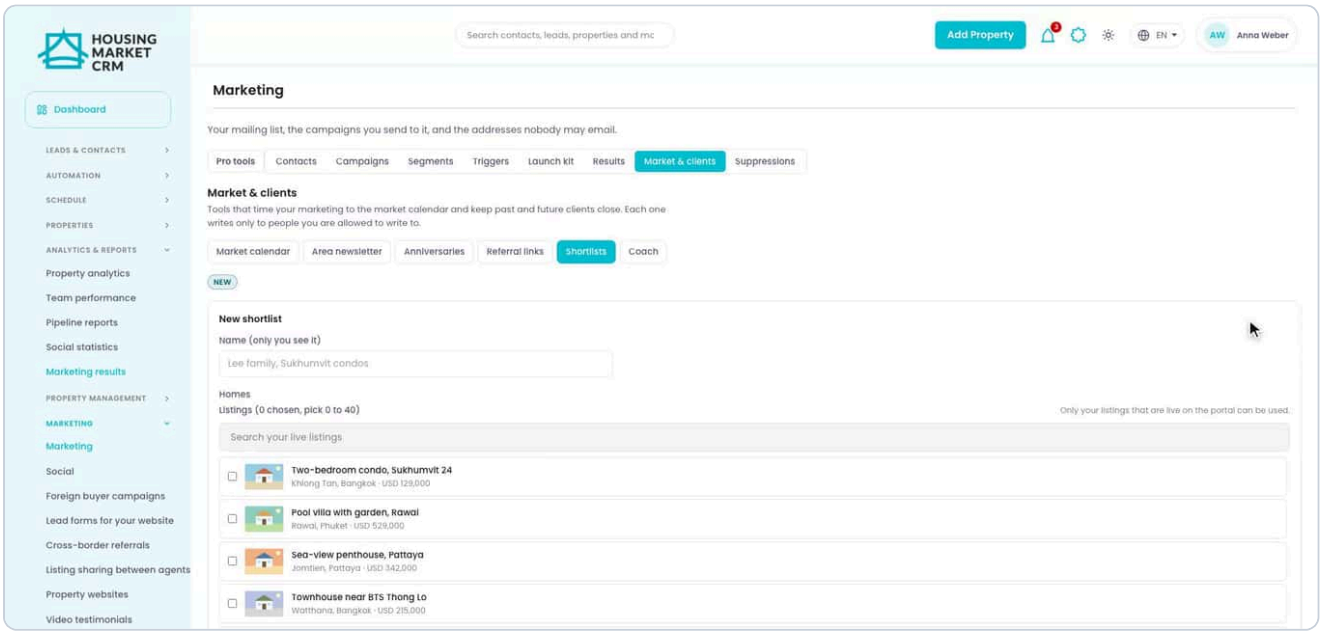


Figure 148.13 · Screen recorded 4 November 2026

14 Give it a **name**. Only you see it.

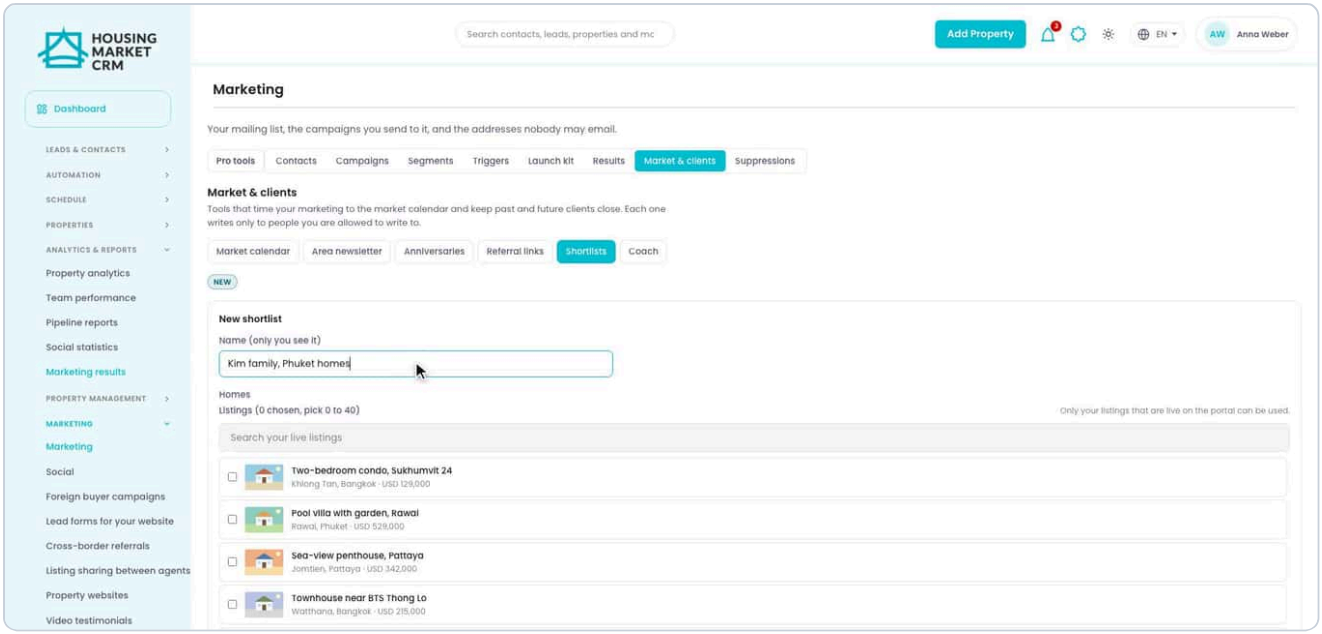


Figure 148.14 · Screen recorded 4 November 2026

15 Tick the **homes** to share.

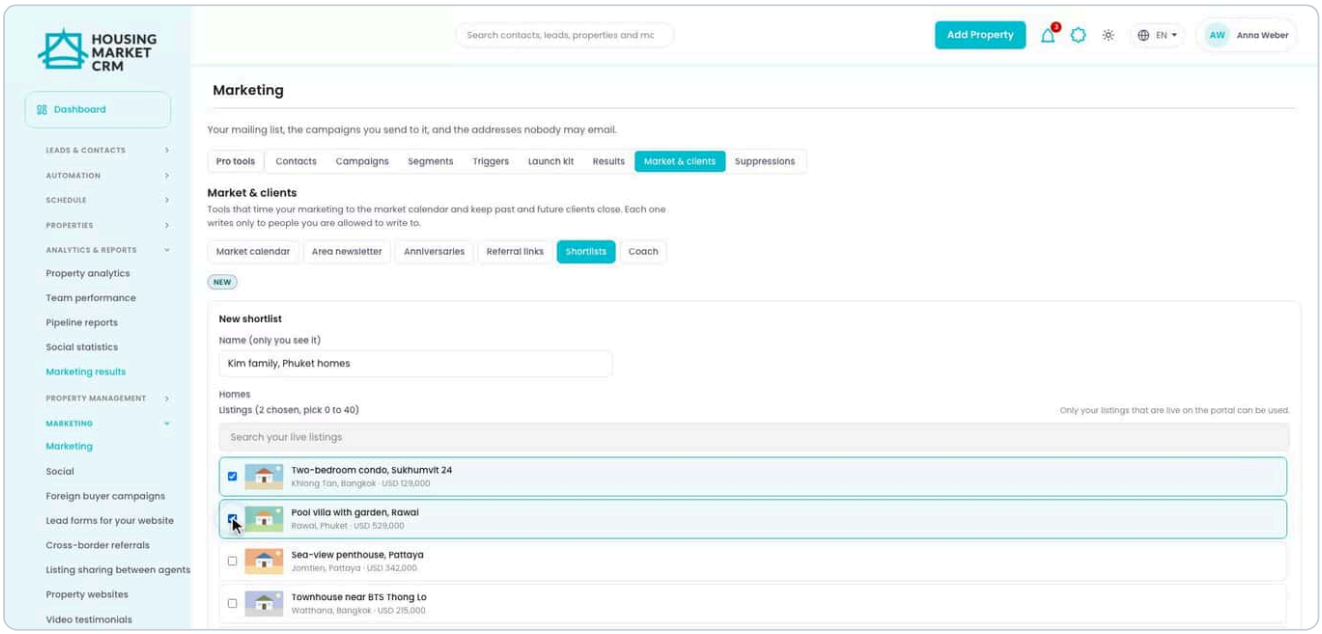


Figure 148.15 · Screen recorded 4 November 2026

16 Choose **how long** the link works.

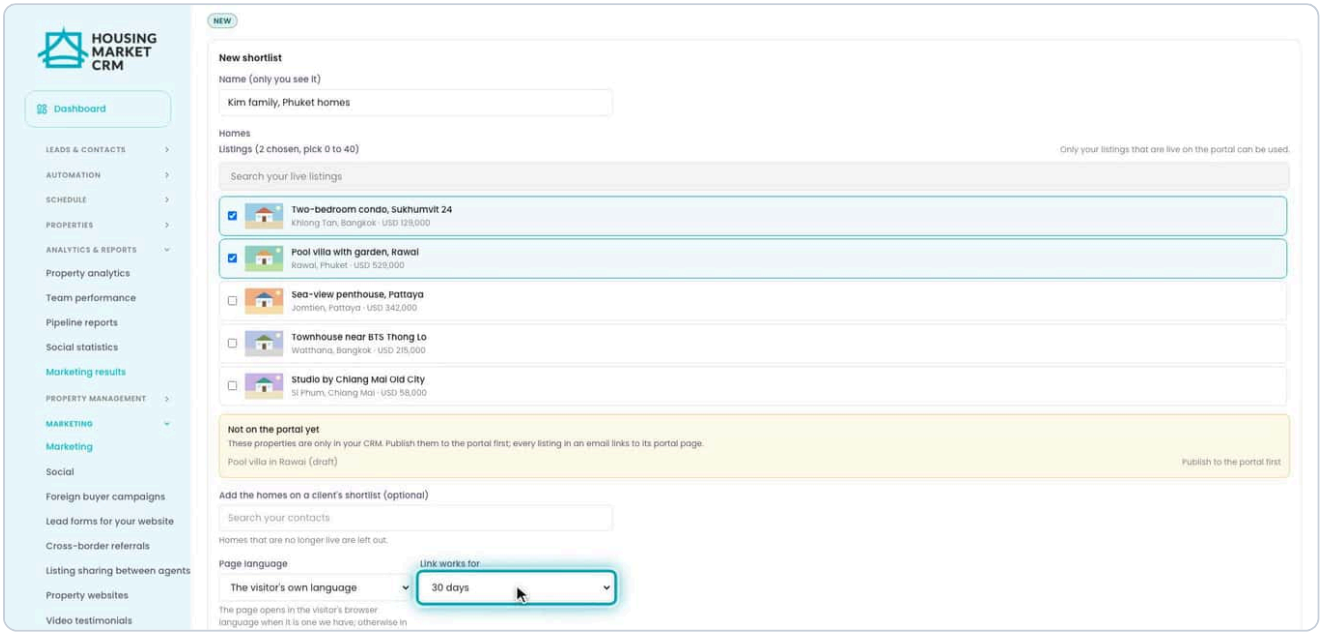


Figure 148.16 · Screen recorded 4 November 2026

17 Click **Create the link**.

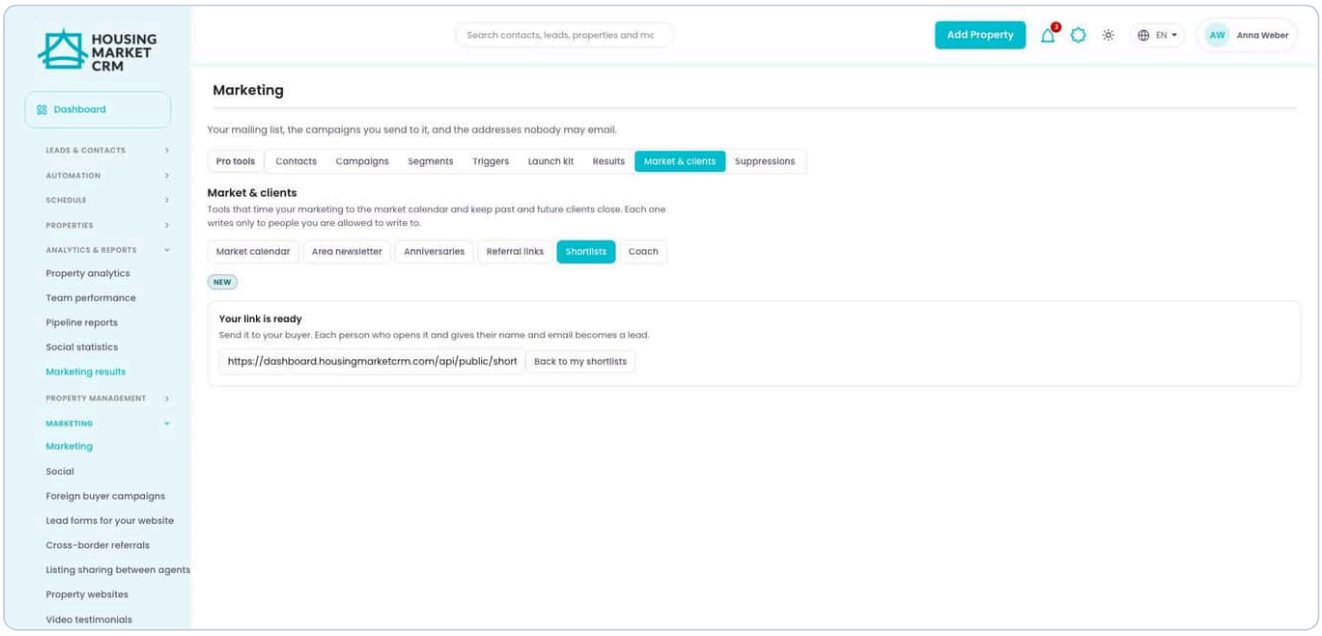


Figure 148.17 · Screen recorded 4 November 2026

18 Send the link to your buyer.

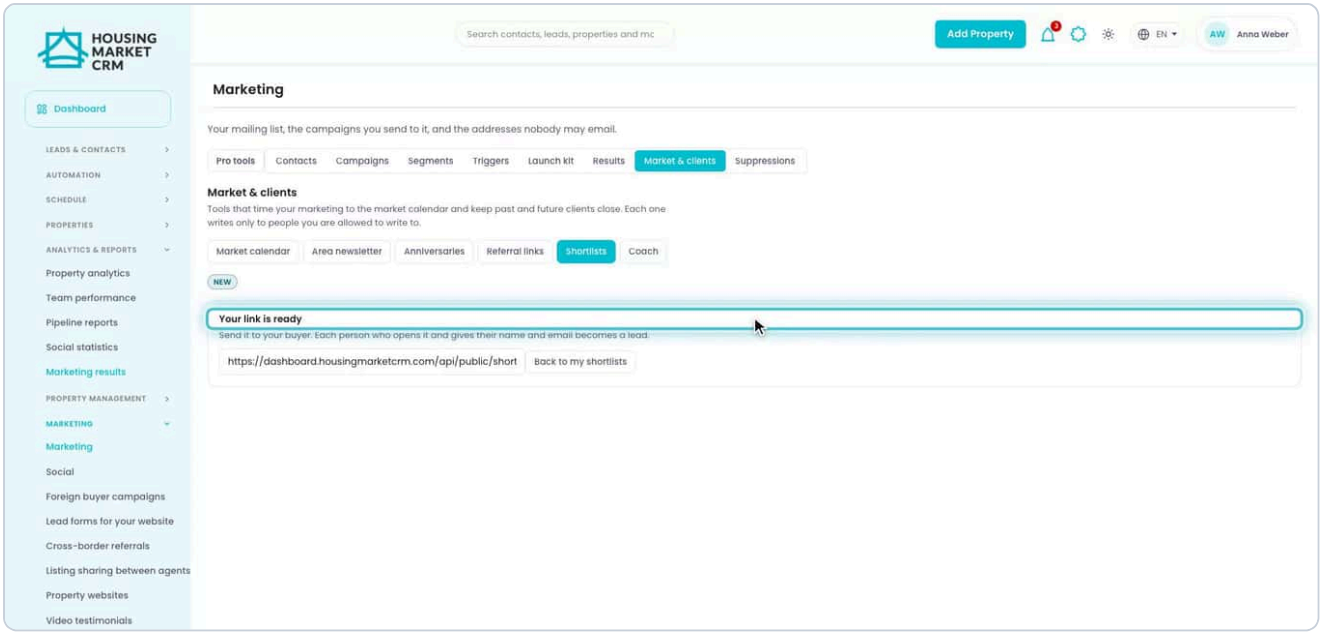


Figure 148.18 · Screen recorded 4 November 2026

19 Each person who opens it and **gives a name and email** becomes a **lead**.

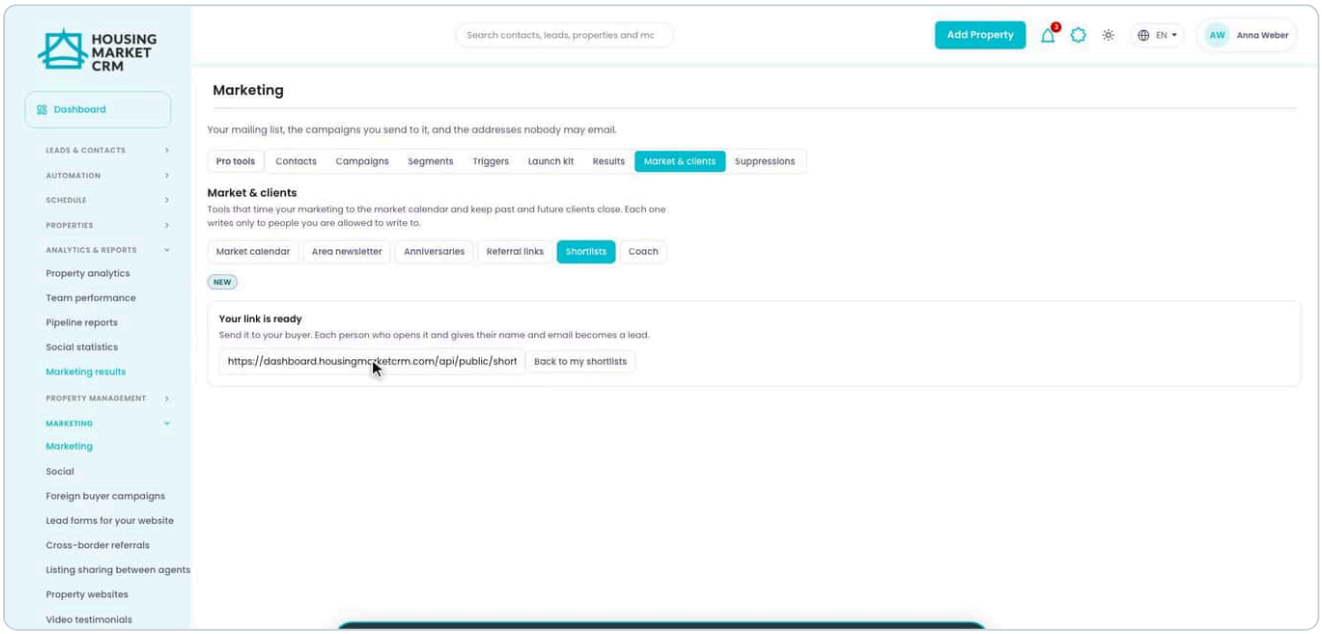


Figure 148.19 · Screen recorded 4 November 2026

149 CHAPTER 149

Pro tools: local market calendar

Pro and Business | For agents who want their properties on their own website | Watch the video

OVERVIEW

Under Marketing, Pro tools holds an AI writer, seller presentations, weekly seller reports and a marketing score for each listing. Market and clients adds a market calendar, an area newsletter, anniversary emails, referral links, shortlists and a daily coach.

The Pro marketing tools are part of the Pro and Business plans. On a Free plan the tools are shown as locked, with the way to upgrade. Under Marketing, choose Pro tools, and open the Market and clients tab for the second group.

Pro tools

- AI writer writes a draft in seconds: a listing description, an email about a property or the text of a seller presentation, in any of seventeen languages. Listing descriptions can be written only in the languages your portal publishes. The draft uses only the details you give it and the listing you choose, prices and street addresses are never sent to the writer, and nothing is stored. Read it and correct it before you use it.
- Seller presentations makes a presentation for a seller meeting from one of your live listings: your pitch, a market estimate range from comparable listings, the price you suggest and how you will market the property. Print it or save it as a PDF in the seller's language. The market estimate is a snapshot of the day you made it, and when there are too few similar listings nearby the presentation says so instead of guessing.
- Seller reports keeps the owner of a listing informed with an email every Monday with the week's views, enquiries and viewings, and a live page they can open at any time with a link that you can replace. You first confirm that the seller asked for the report. Nothing is sent to someone who unsubscribed.
- Marketing score gives one of your live listings a score out of 100 from its photos, video and tour, description, details, price against the market estimate and views, and lists the few things that would raise it. A part that cannot be judged yet is left out instead of counting as zero.

Market and clients

- Market calendar has ready-made greetings for the key dates of a market, already written in every language. Pick a date, check the words, choose who gets it and when, and it is sent for you on the day. Nothing goes out without your confirmation.
- Area newsletter sends the people in one of your saved segments, once a month, the market figures of one district from Housing Market Insights with a few of your own live homes below. It is never sent twice in a month and never when there is too little data behind the figures.
- Anniversaries writes to each client on the anniversary of the day they got their home, with a short market estimate when we can stand behind one.
- Referral links gives each past client their own link. Anyone who opens it lands on your profile page, and an enquiry made within 30 days arrives as a lead with the source Referral. You see how many people opened each link, how many enquiries came through it and how many became deals.
- Shortlists puts some of your live homes behind one link that you send to a buyer. To open a home's page, the visitor gives you their name and email.
- Coach suggests three things worth doing today, picked from your own marketing. Nothing is sent for you.

Every email from these tools goes only to people you are allowed to write to, and each follows the same unsubscribe rules as your campaigns.

From the Help Center: **What are the Pro marketing tools?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

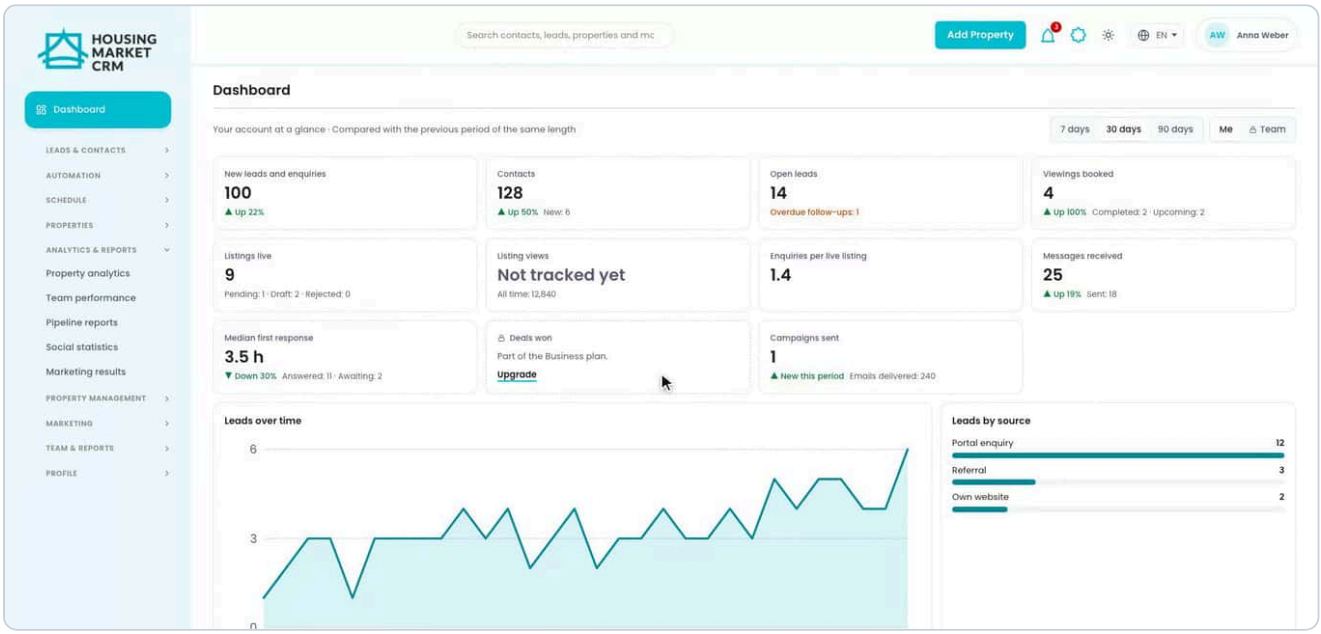


Figure 149.1 · Screen recorded 4 November 2026

2 Open **Marketing** in the left menu.

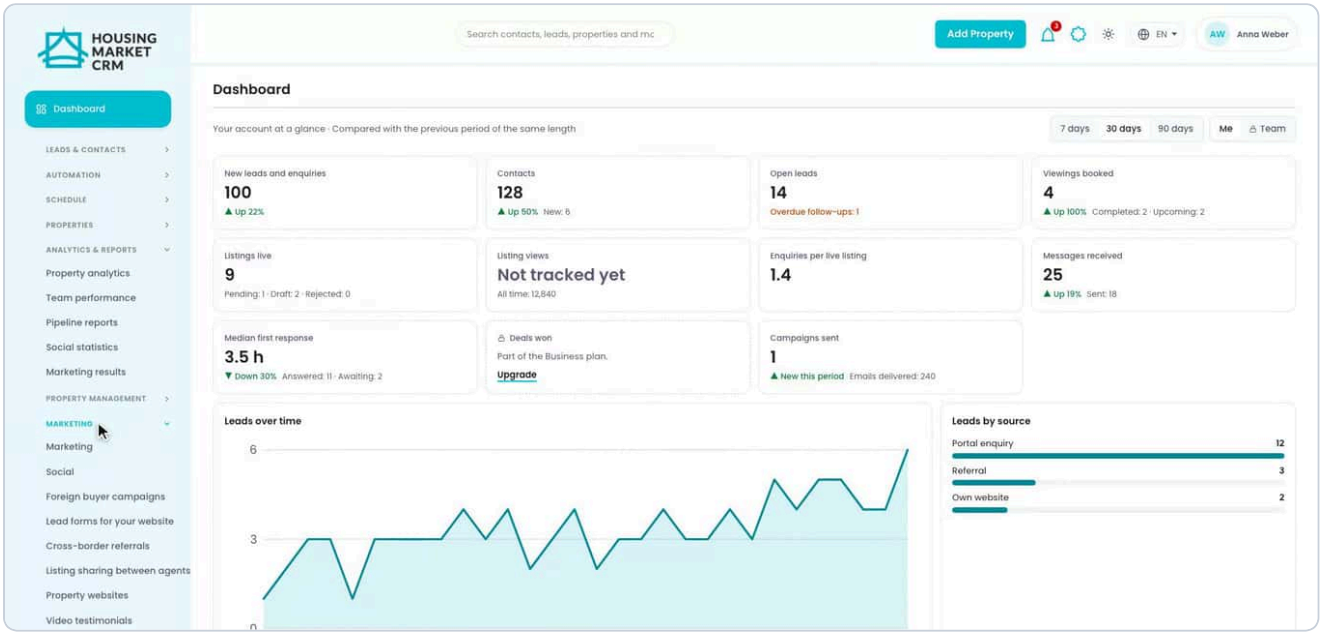


Figure 149.2 · Screen recorded 4 November 2026

3 Click **Marketing**.

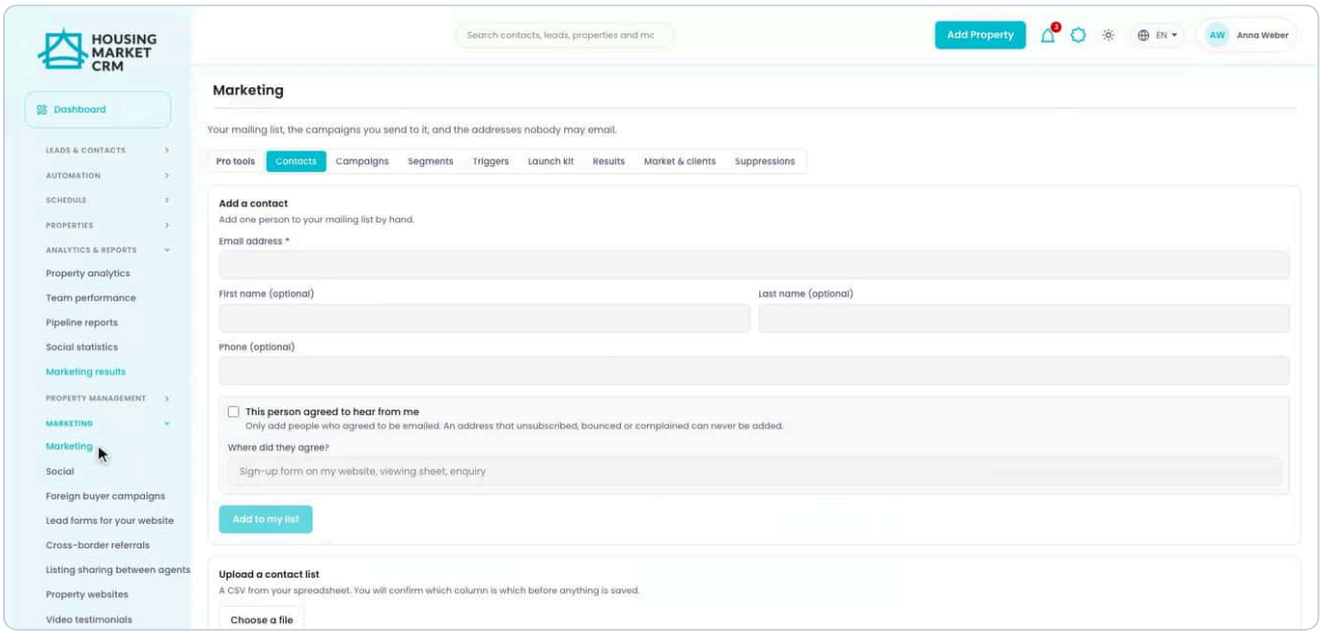


Figure 149.3 · Screen recorded 4 November 2026

4 Open the **Market & clients** tab.

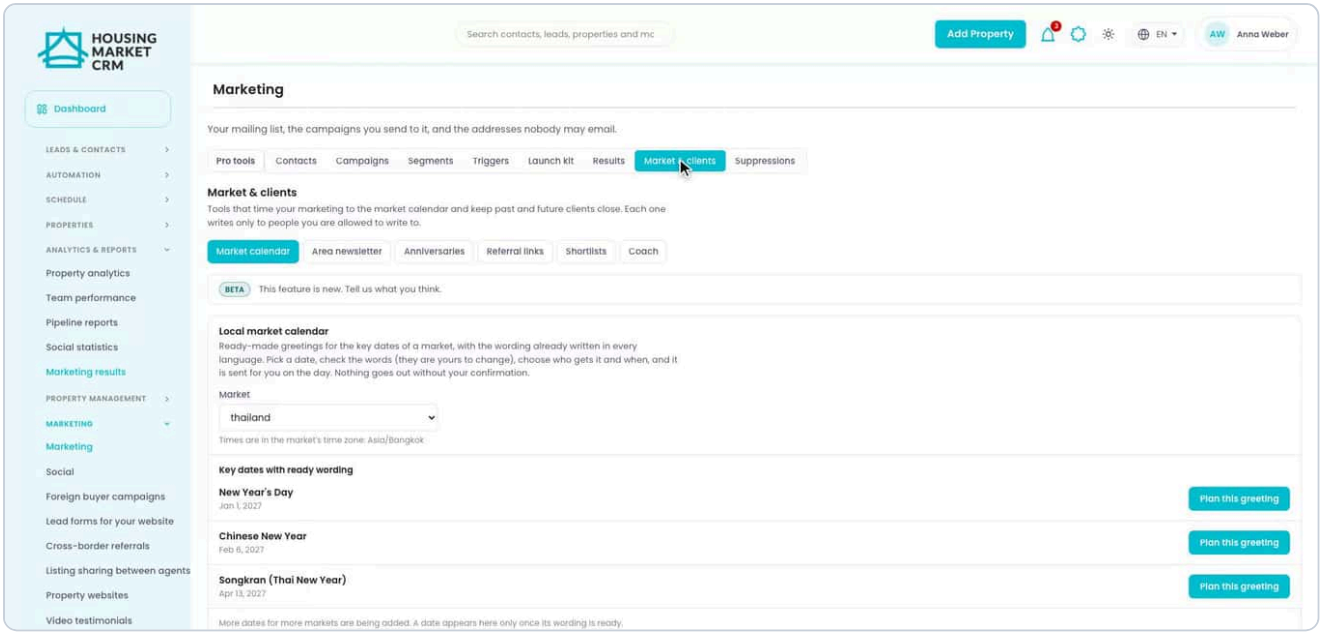


Figure 149.4 · Screen recorded 4 November 2026

5 Click **Market calendar**.

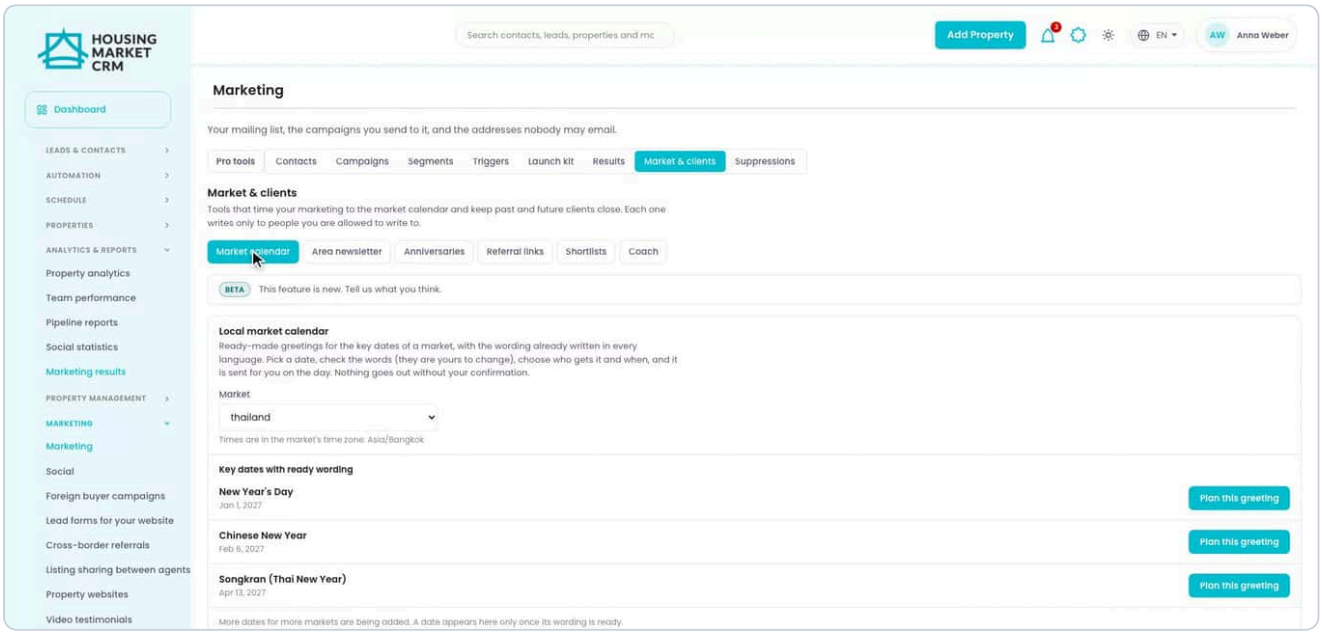


Figure 149.5 · Screen recorded 4 November 2026

6 **Ready-made greetings** for the key dates of your market.

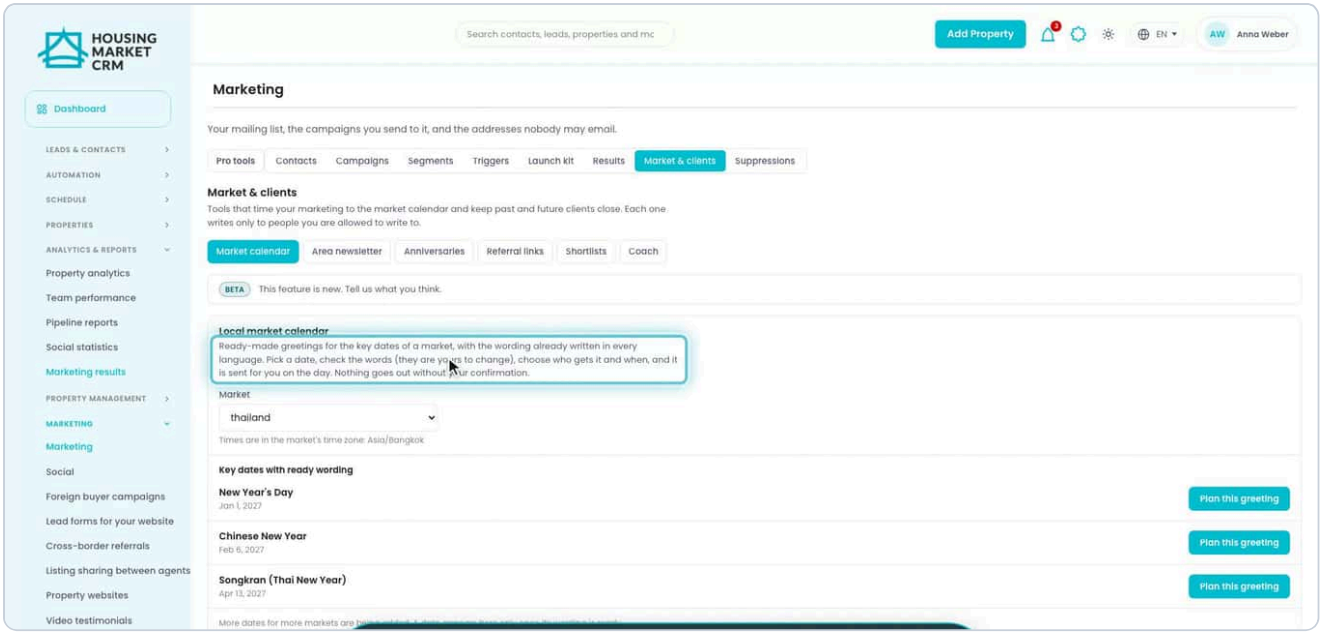


Figure 149.6 · Screen recorded 4 November 2026

7 A date appears here once its **wording is ready**.

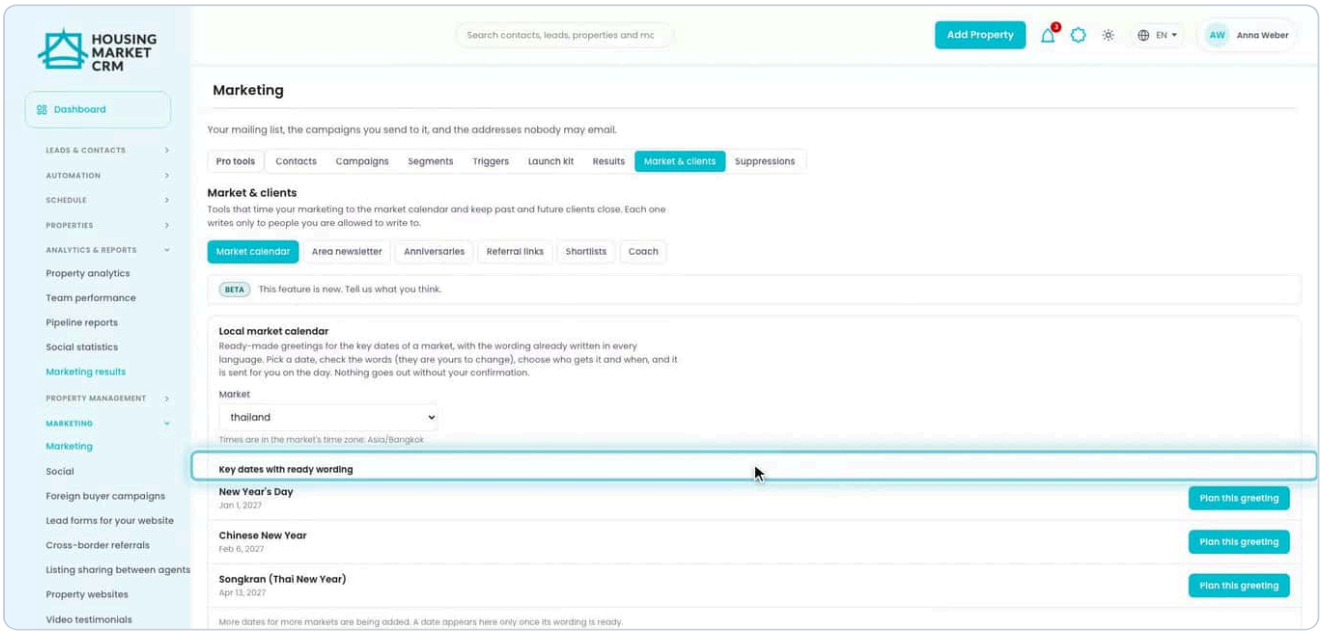


Figure 149.7 · Screen recorded 4 November 2026

8 Take **New Year's Day**.

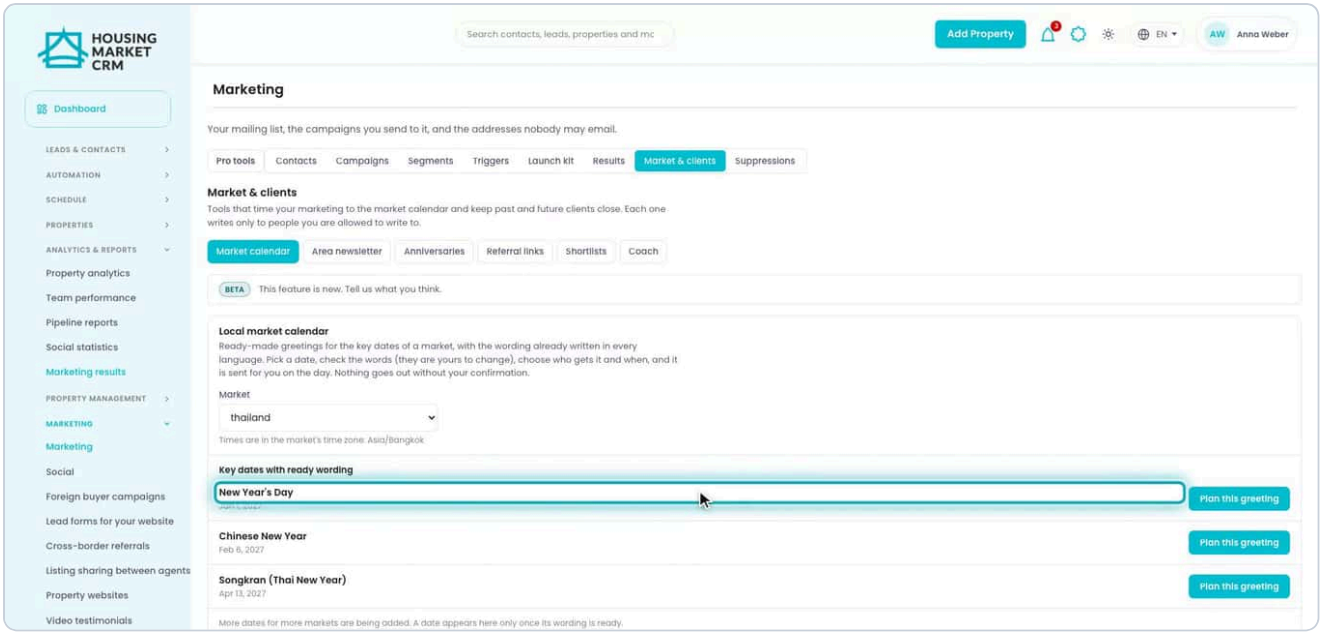


Figure 149.8 · Screen recorded 4 November 2026

9 Click **Plan this greeting**.

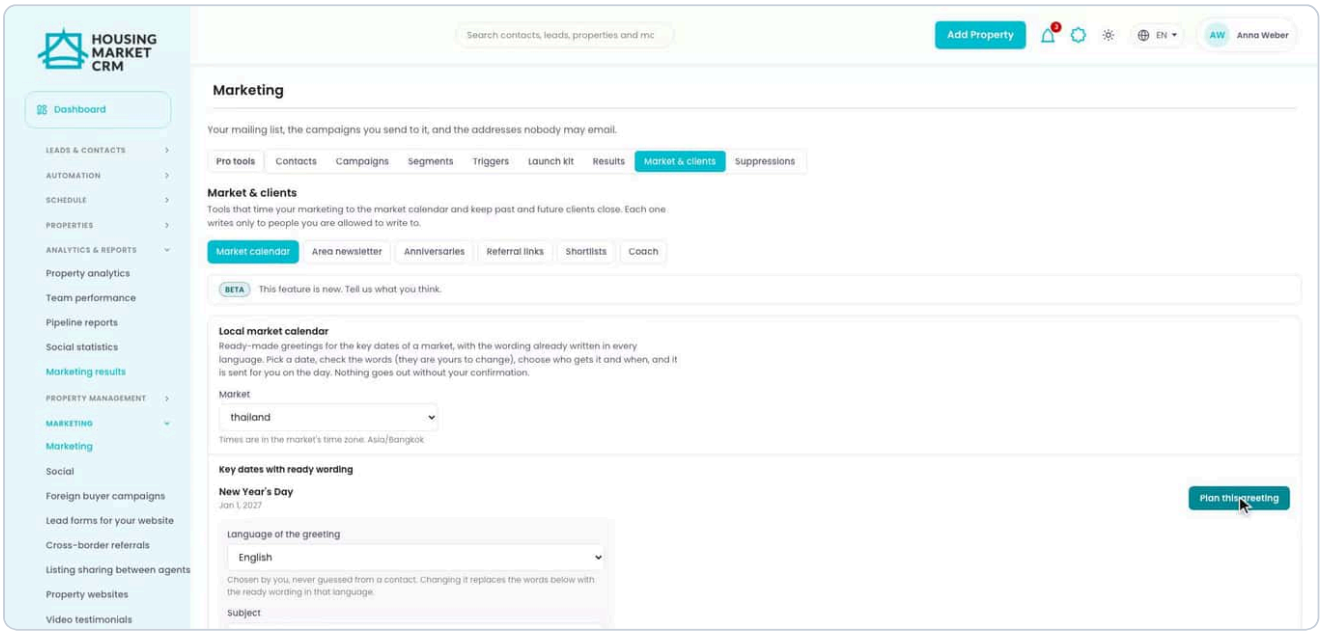


Figure 149.9 · Screen recorded 4 November 2026

10 The **wording is already written**. It is yours to change.

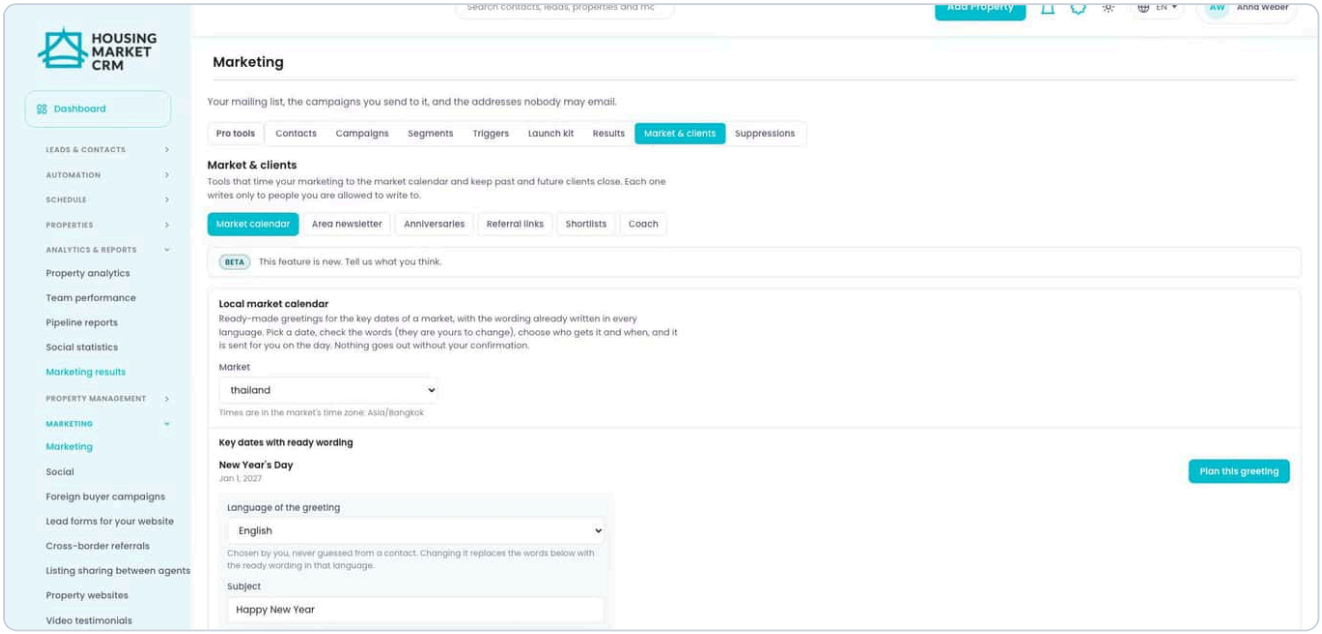


Figure 149.10 · Screen recorded 4 November 2026

11 Choose the **language** yourself.

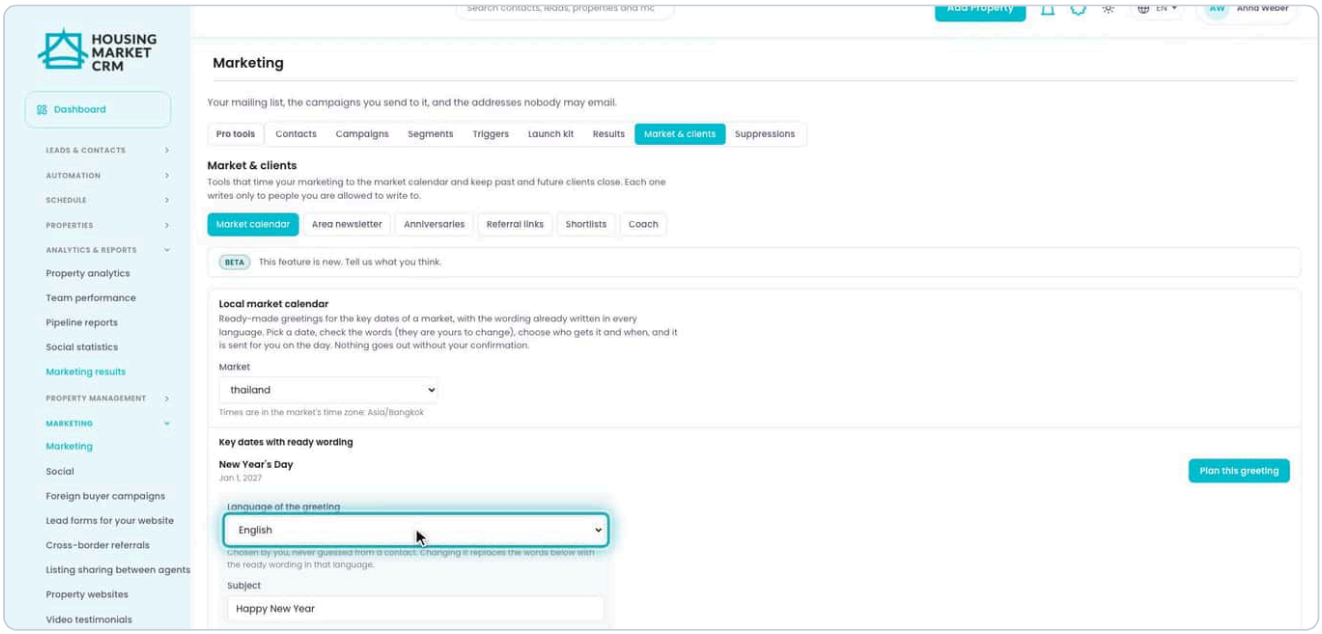


Figure 149.11 · Screen recorded 4 November 2026

12 Click **Count the people**.

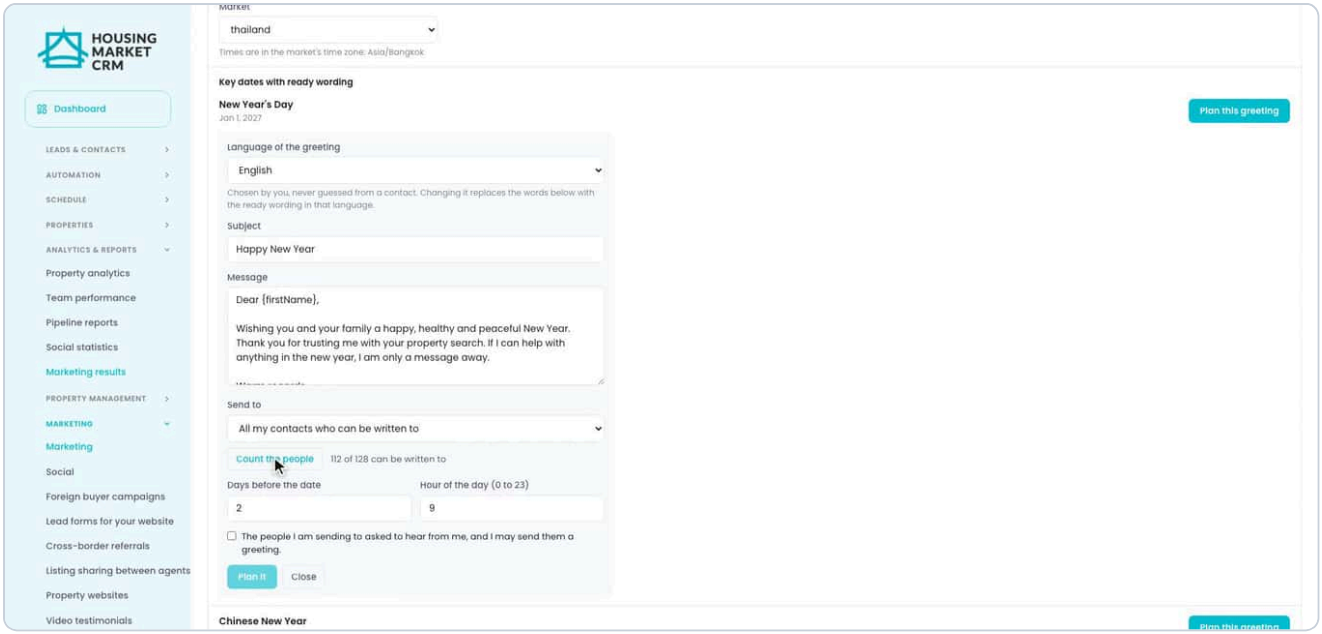


Figure 149.12 · Screen recorded 4 November 2026

13 See **how many** of your contacts can be written to.

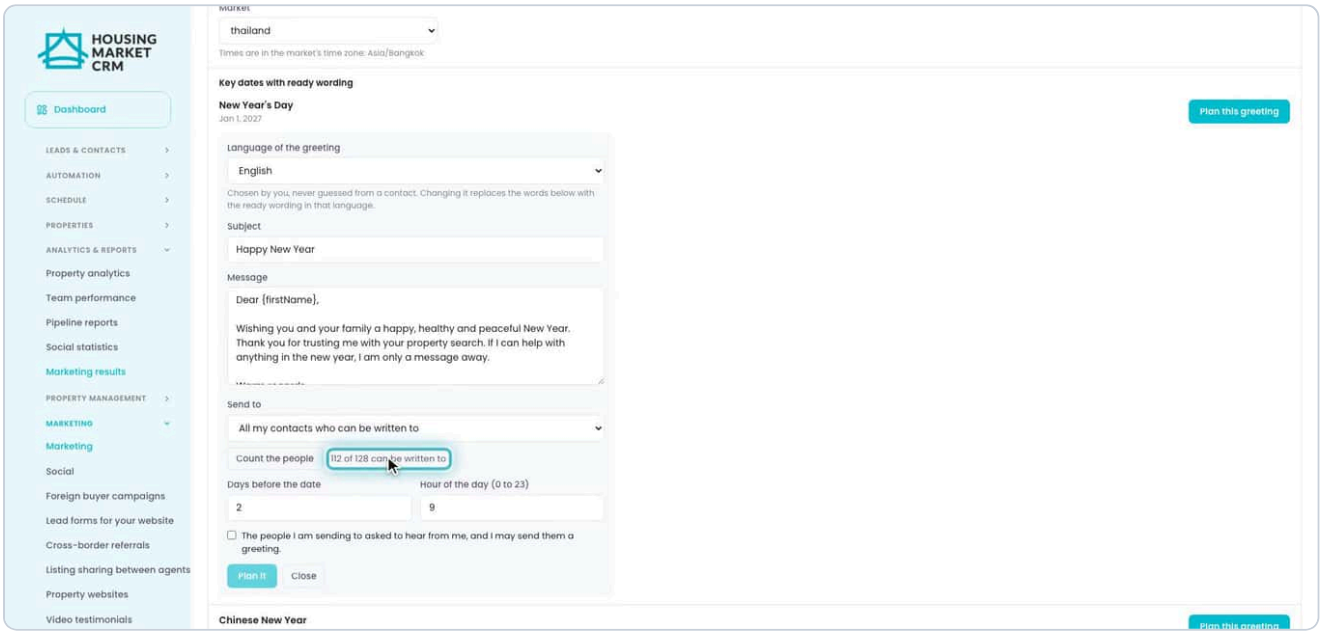


Figure 149.13 · Screen recorded 4 November 2026

14 Choose **how many days before** the date it goes out and the **hour**, in your market's time zone.

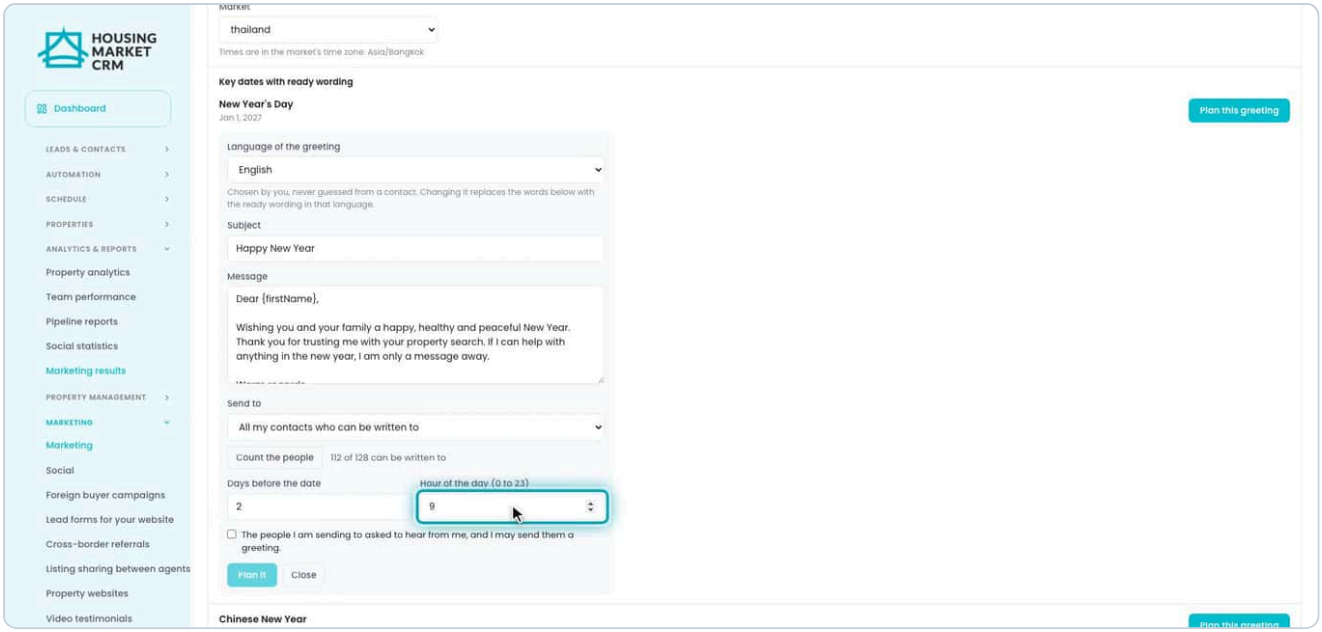


Figure 149.14 · Screen recorded 4 November 2026

15 Confirm the people **asked to hear from you**.

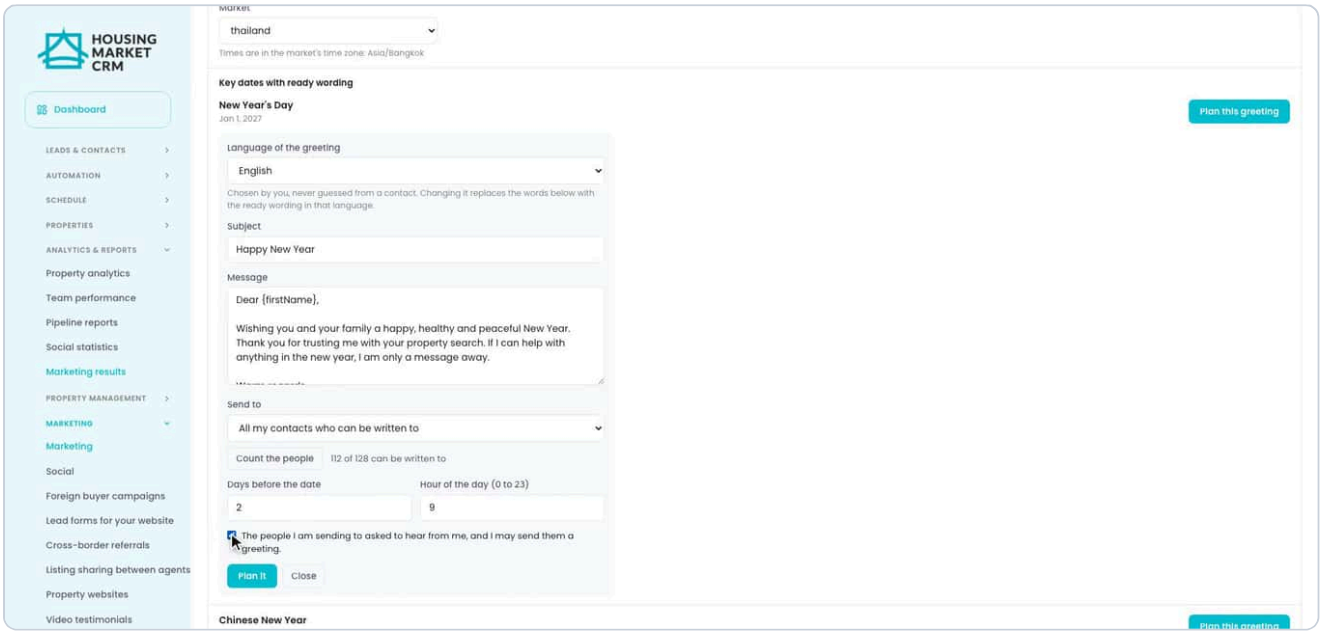


Figure 149.15 · Screen recorded 4 November 2026

16 Click **Plan it.**

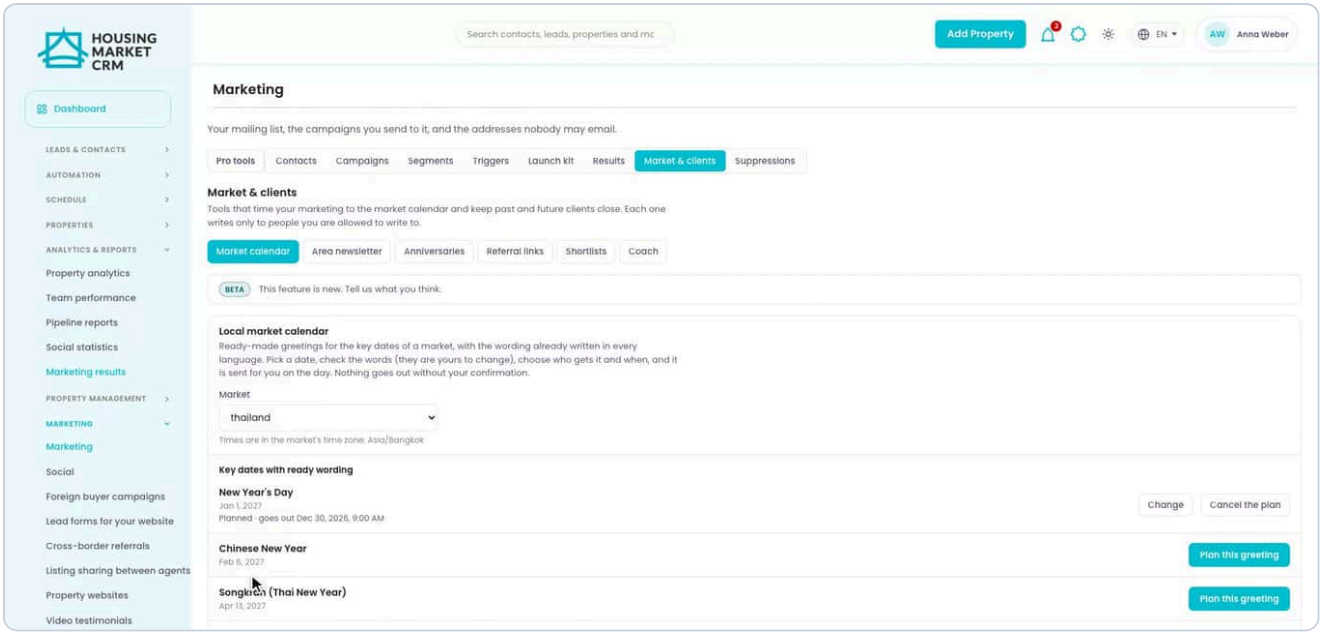


Figure 149.16 · Screen recorded 4 November 2026

17 The greeting is **planned**. It goes out for you on the day.

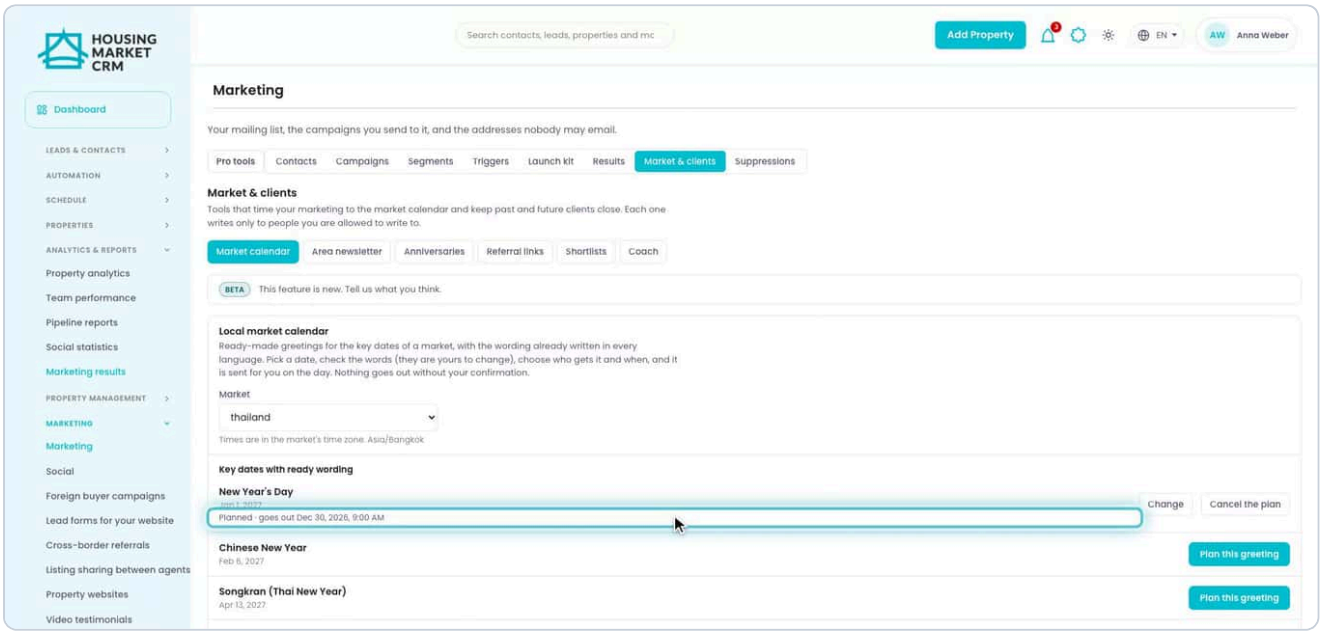


Figure 149.17 · Screen recorded 4 November 2026

18 You can **change** it or **cancel the plan** until it goes out.

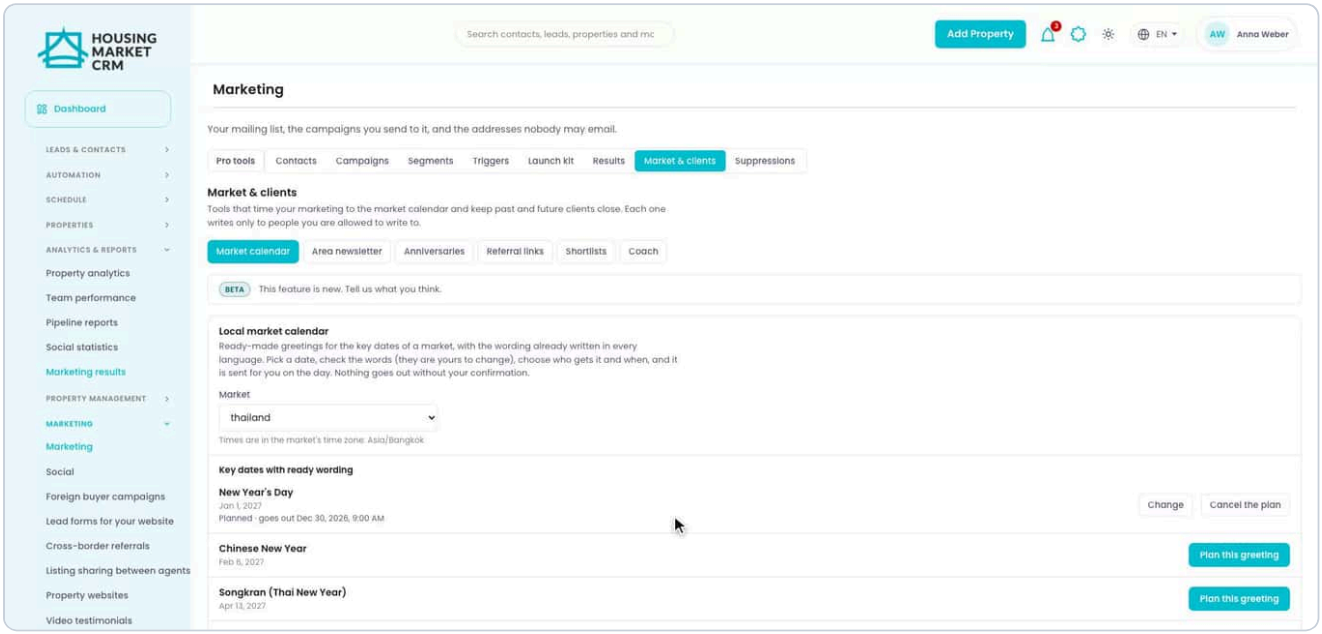


Figure 149.18 · Screen recorded 4 November 2026

150 CHAPTER 150

See your ad results in the Results tab

Pro and Business | For agents and agencies | Watch the video

OVERVIEW

For the last 7, 30 or 90 days: the emails you sent and what came of them, and the enquiries, viewings and closed deals that came through your marketing. It is part of Pro.

Open Marketing and then Results, and choose the last 7, 30 or 90 days. The tiles count the emails sent, opened, clicked, bounced and complained about, and the enquiries, viewings booked and deals closed that came through your marketing. A table shows the same by channel: email, social, ads, flyers and open houses, and websites. Your email campaigns are listed with their own figures.

Only enquiries that arrived through a link, a flyer, an open house, a social post, a website or an Ads campaign are counted. A portal enquiry, a phone call or an imported contact is not a marketing result. Deals are counted, not added up: the value of a deal is in its own currency and the tab does not total money.

The figures update every hour, so a new campaign or enquiry shows within an hour. Opens are approximate, because some mail apps load images in advance and others never do. A manager sees the figures of the whole office.

From the Help Center: **What does the marketing Results tab show?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

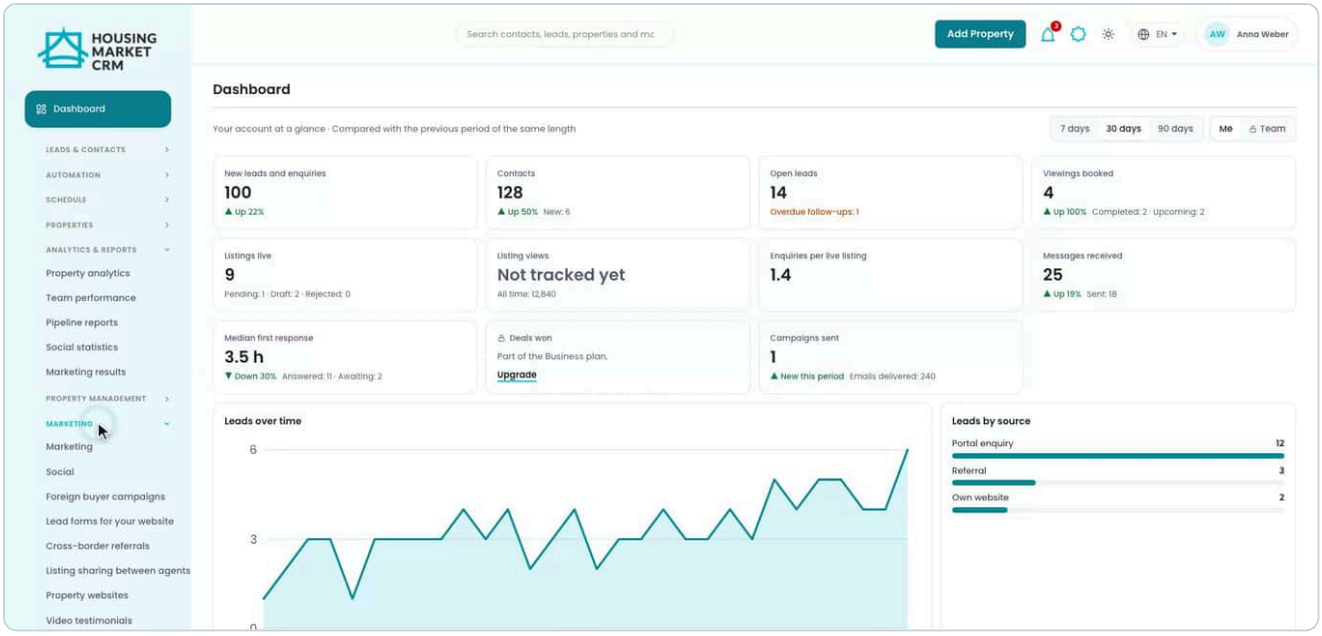


Figure 150.1 · Screen recorded 6 November 2026

2 Click **Marketing**.

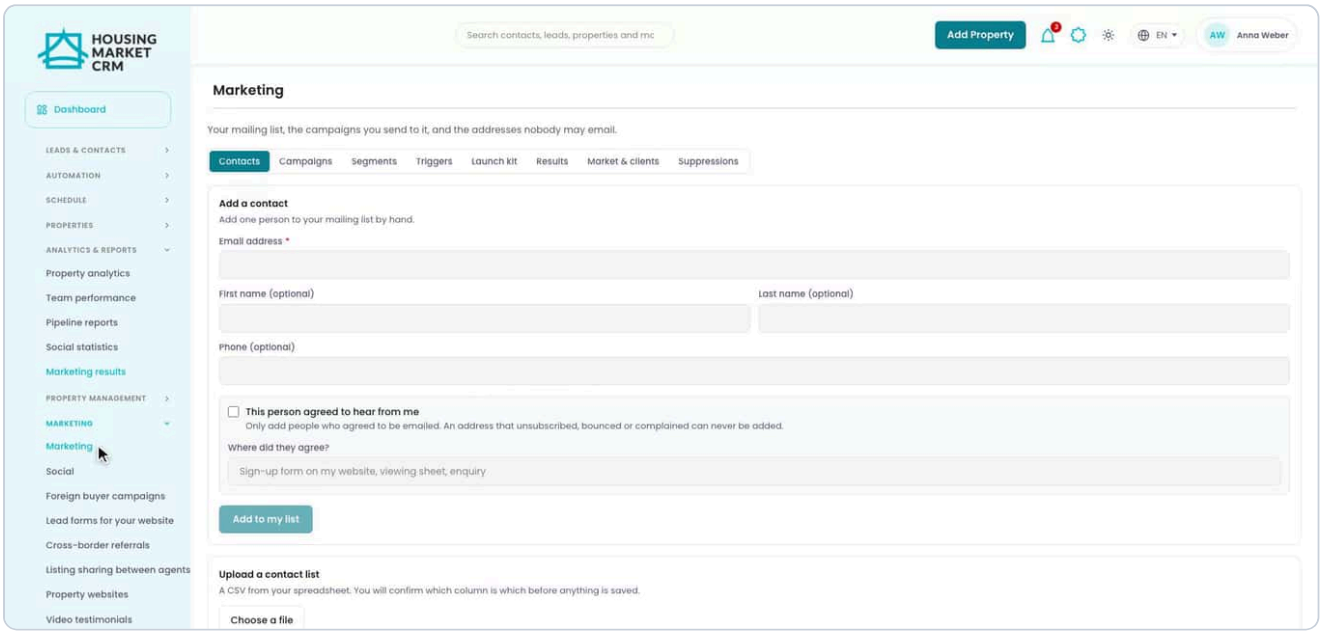


Figure 150.2 · Screen recorded 6 November 2026

3 Open the **Results** tab.

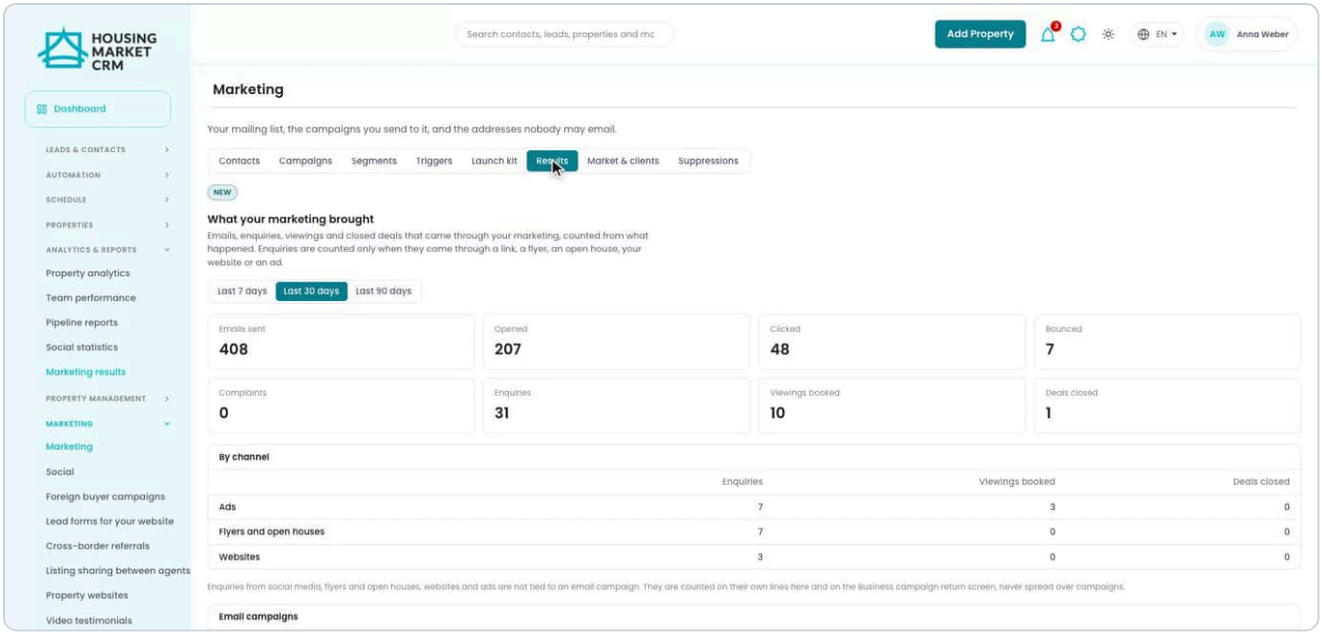


Figure 150.3 · Screen recorded 6 November 2026

4 Scroll to **Advertising**.

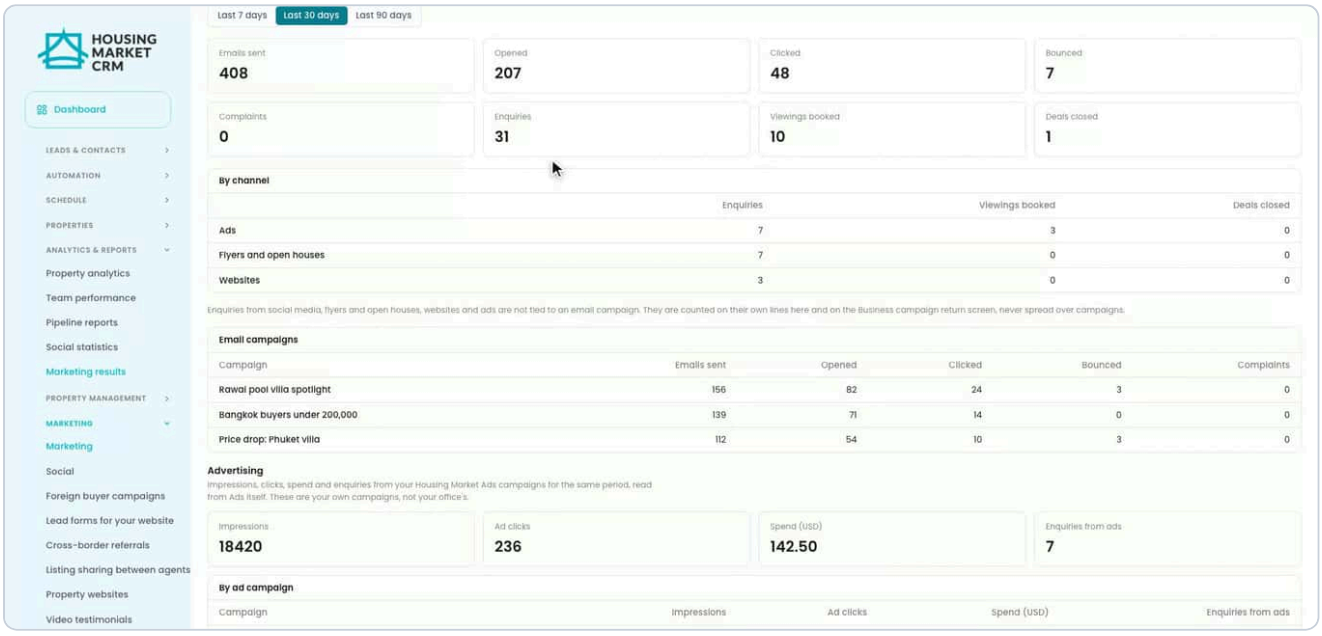


Figure 150.4 · Screen recorded 6 November 2026

5 These are the figures of **your own Housing Market Ads campaigns**.

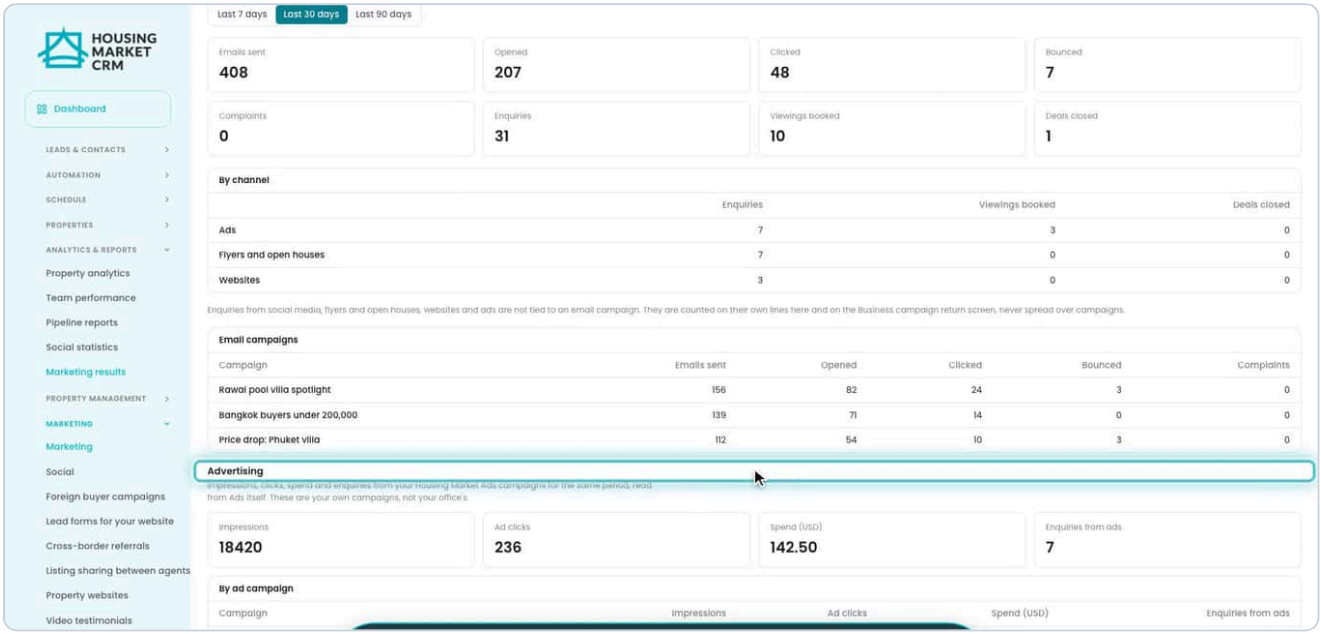


Figure 150.5 · Screen recorded 6 November 2026

6 **Impressions** and **ad clicks** what you **spent**.

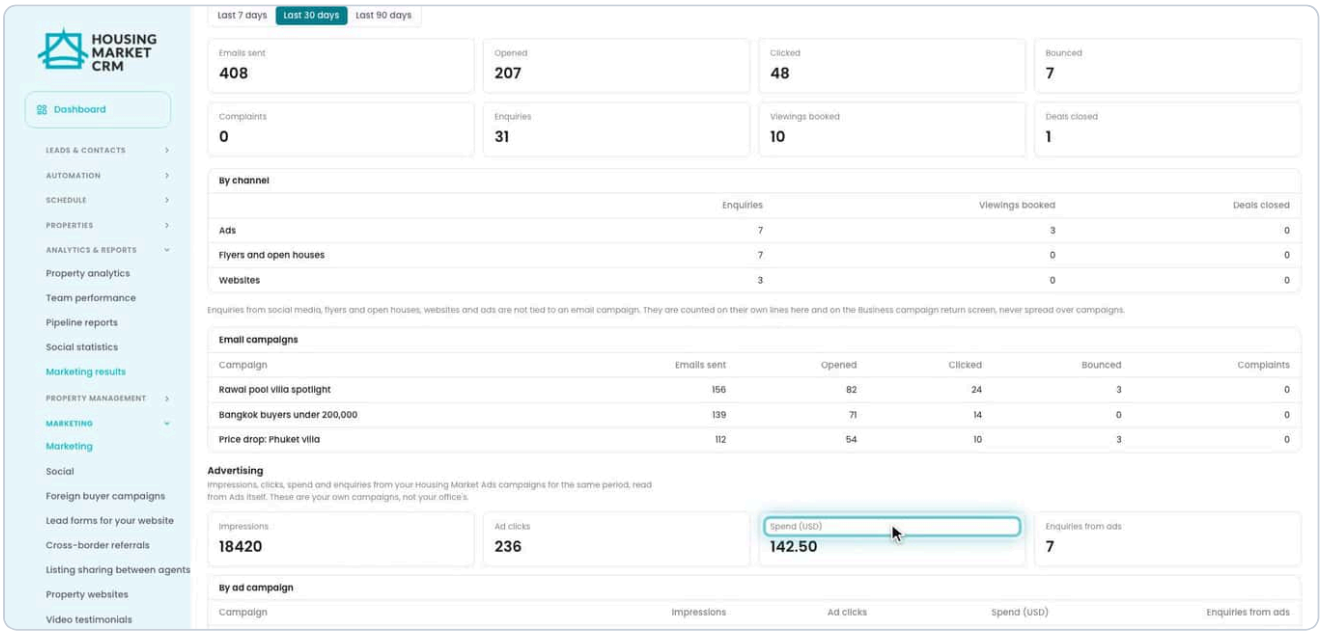


Figure 150.6 · Screen recorded 6 November 2026

7 and the **enquiries** that came from your ads.

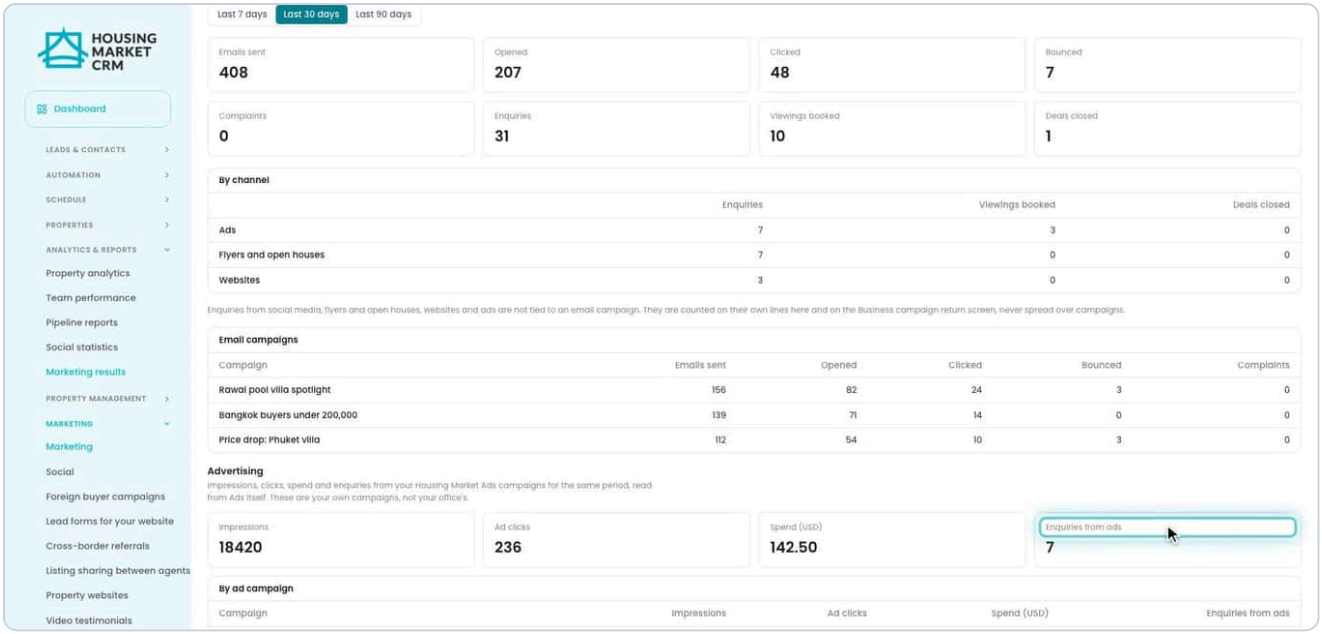


Figure 150.7 · Screen recorded 6 November 2026

8 Each campaign has **its own row**.

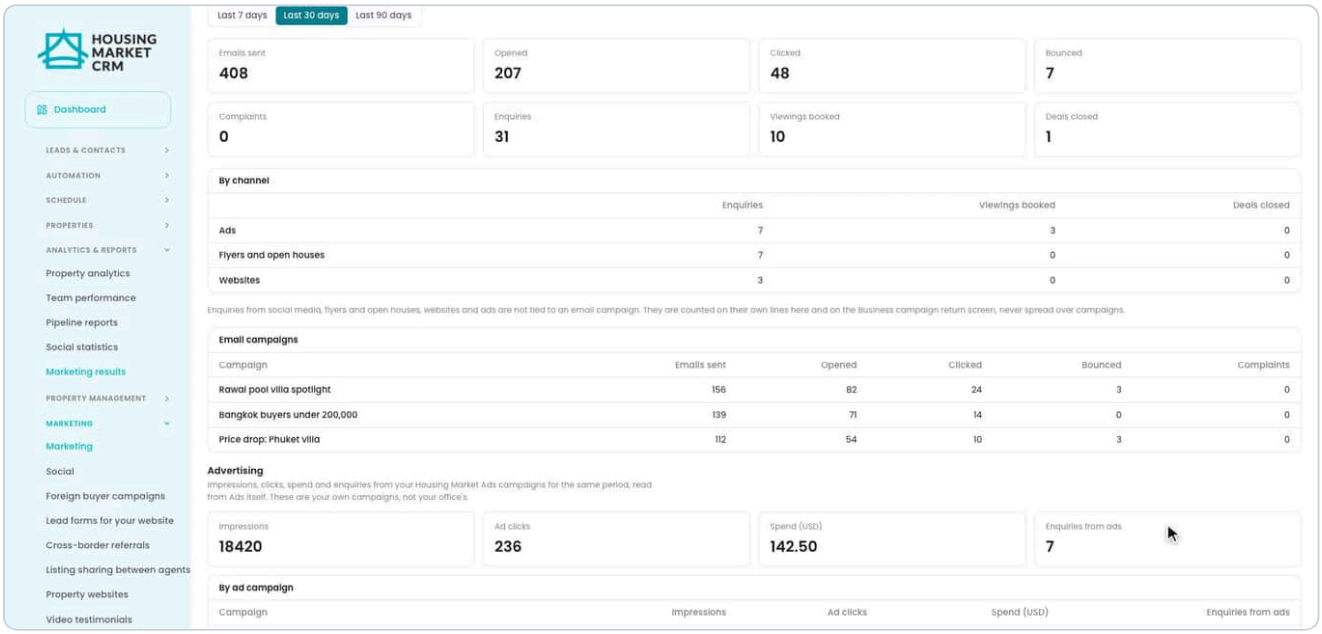


Figure 150.8 · Screen recorded 6 November 2026

9 Impressions, clicks, spend and enquiries **per campaign**.

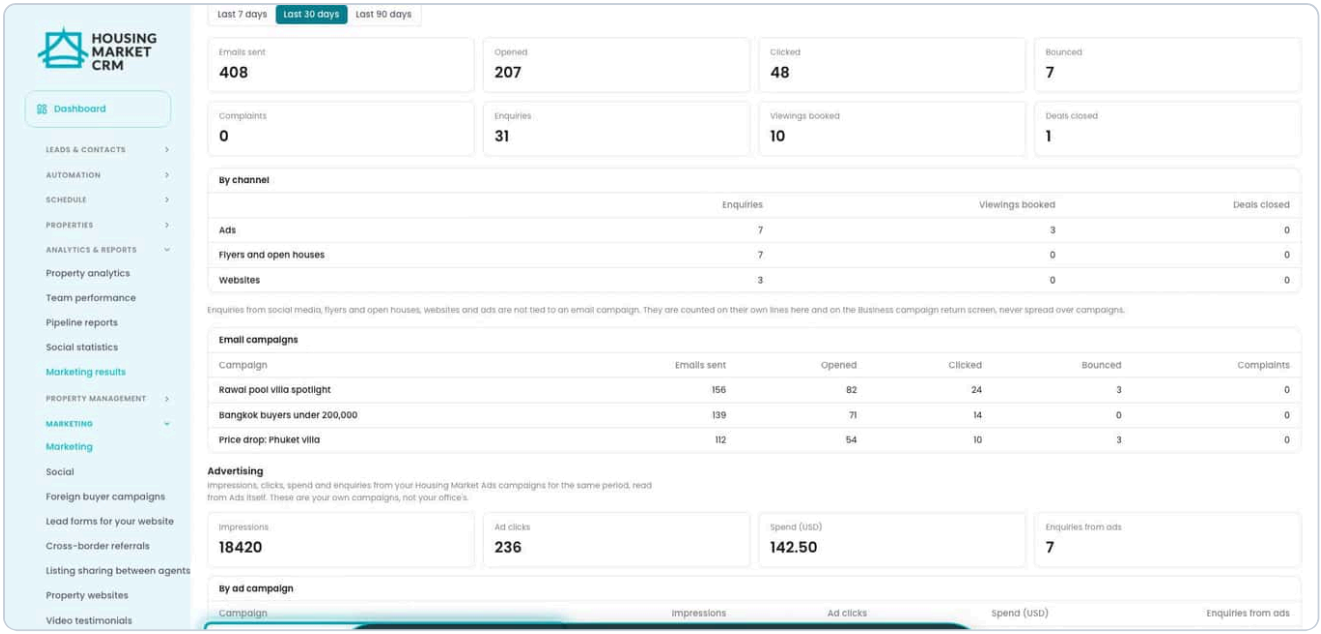


Figure 150.9 · Screen recorded 6 November 2026

10 An enquiry counts when the visitor **came from your ad** and their cookie choice **allows advertising measurement**.

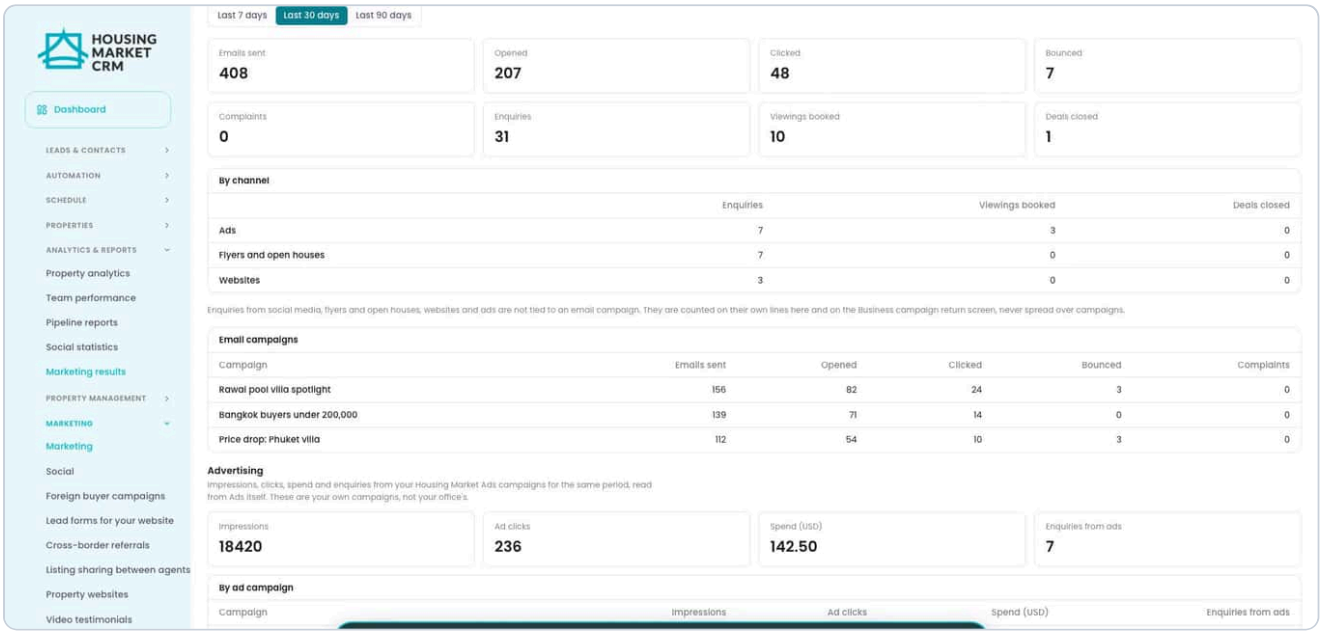


Figure 150.10 · Screen recorded 6 November 2026

11 So some enquiries are **never counted**. Use the figure as a guide.

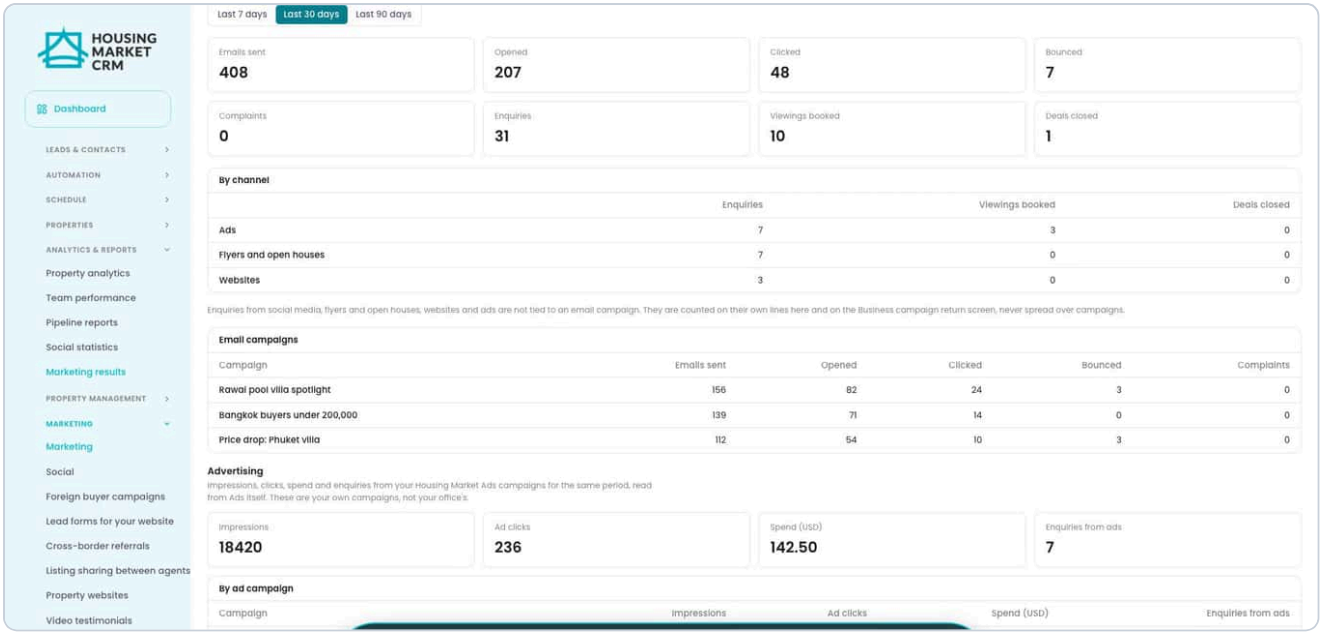


Figure 150.11 · Screen recorded 6 November 2026

RELATED HELP CENTER ARTICLES

Does the CRM work with Housing Market Ads?	faq.housingmarketgroup.com/faq/does-the-crm-work-with-housing-market-ads
What are the Pro marketing tools?	faq.housingmarketgroup.com/faq/what-are-the-pro-marketing-tools

151 CHAPTER 151

See your social results in the Results tab

Pro and Business | For agents and agencies | Watch the video

OVERVIEW

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From the Help Center: **What does the marketing Results tab show?**

STEP BY STEP

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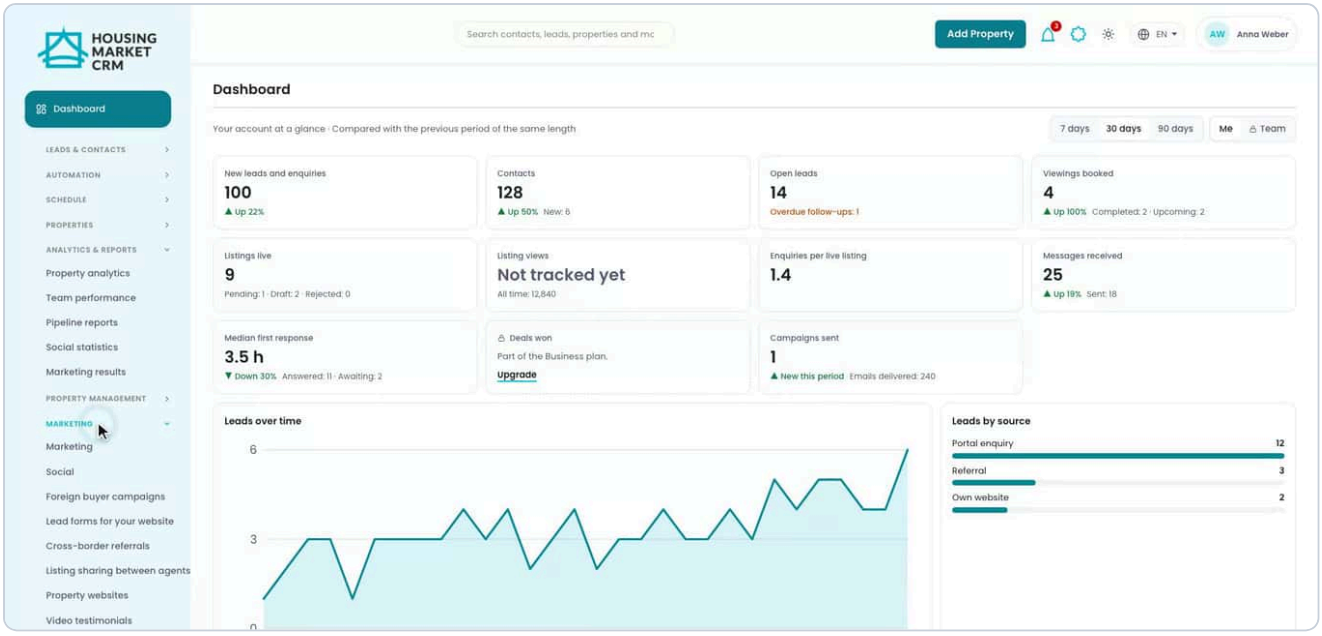


Figure 151.1 · Screen recorded 6 November 2026

2 Click **Marketing**.

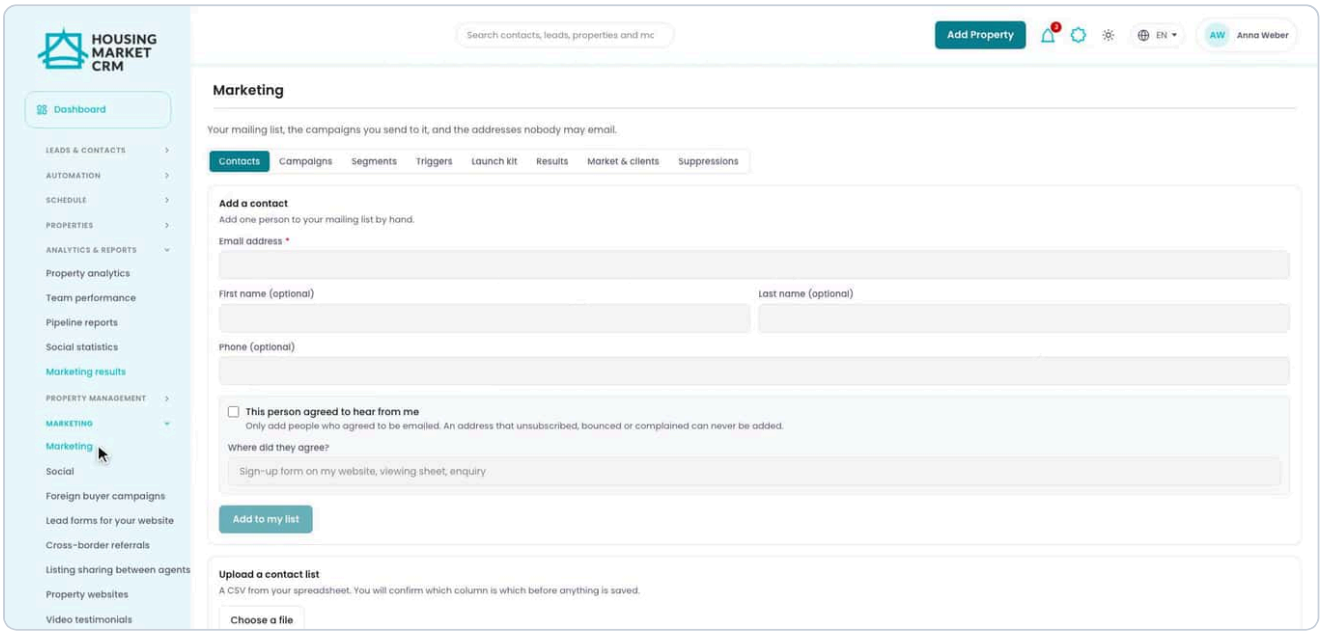


Figure 151.2 · Screen recorded 6 November 2026

3 Open the **Results** tab.

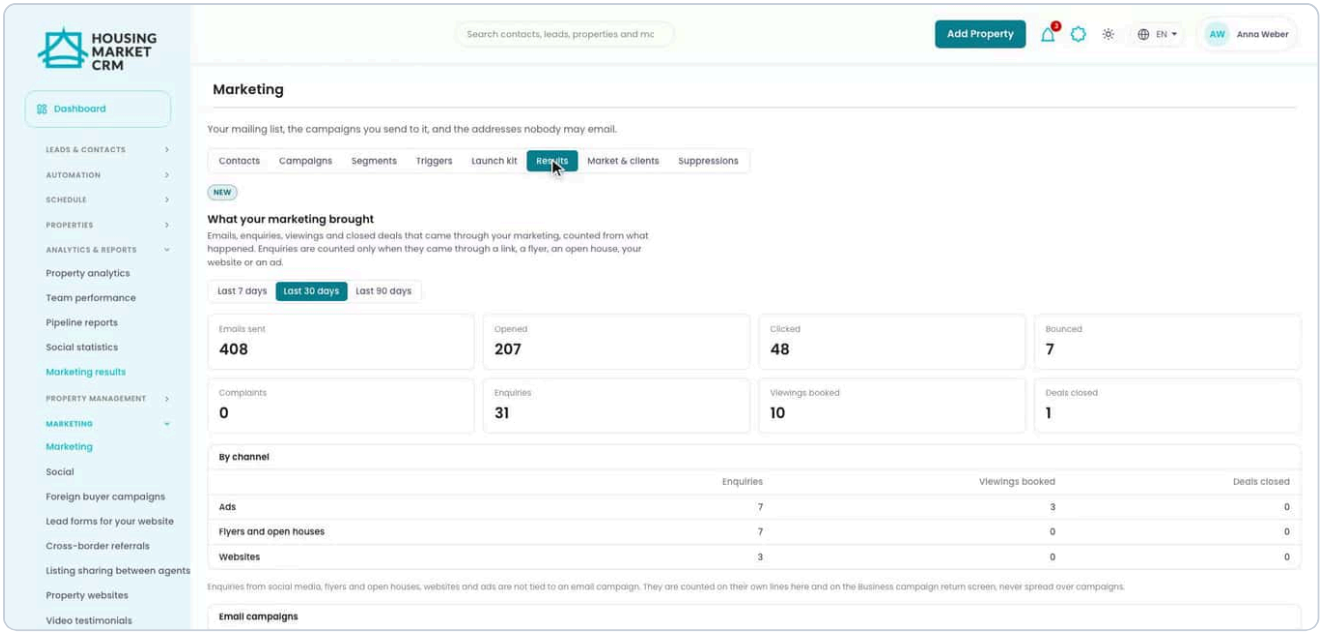


Figure 151.3 · Screen recorded 6 November 2026

4 Scroll to **Social media**.

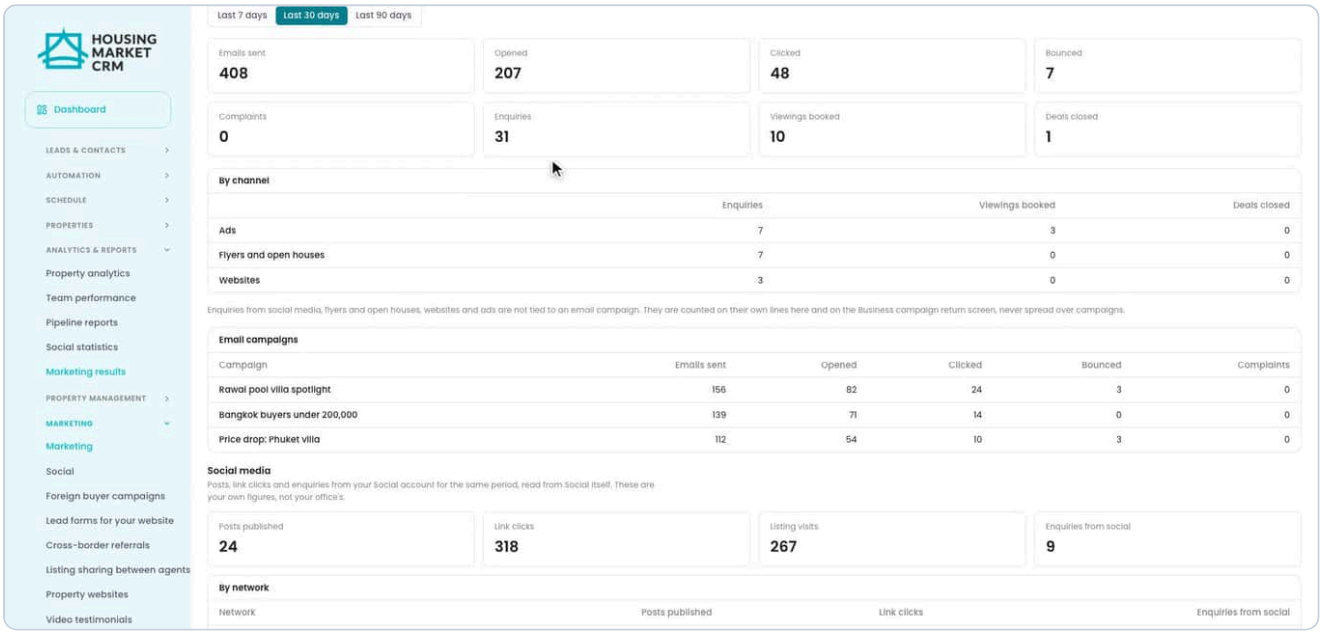


Figure 151.4 · Screen recorded 6 November 2026

5 These are the figures of **your own Housing Market Social account**.

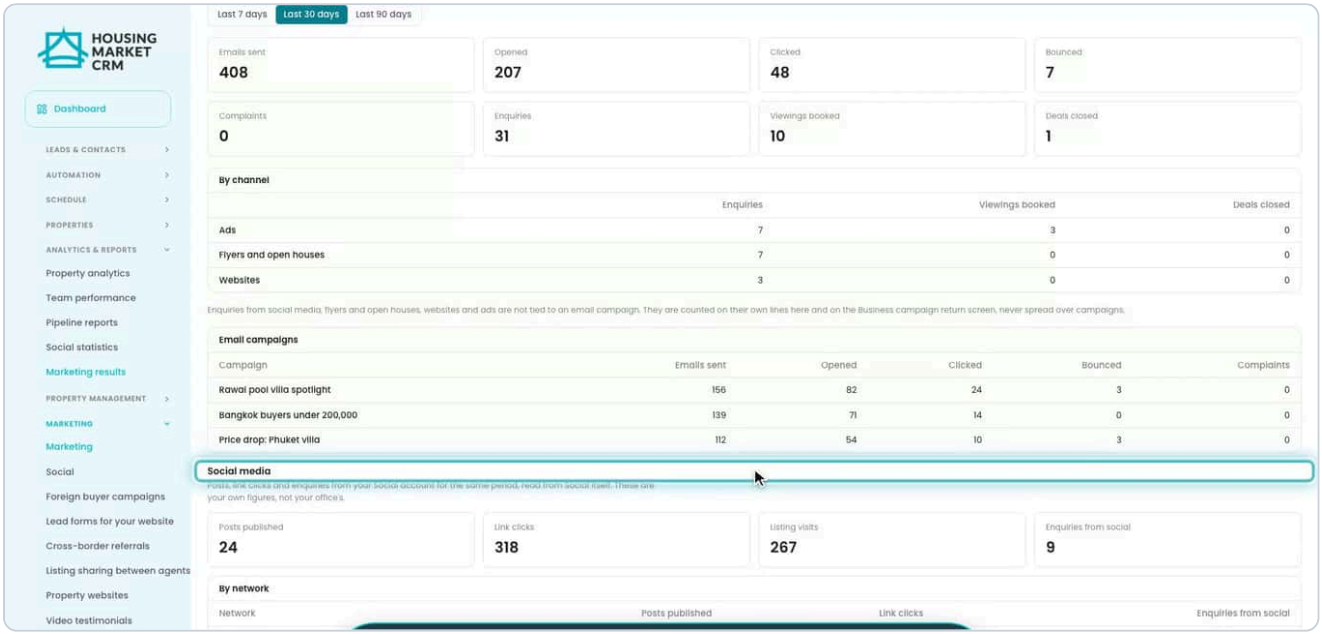


Figure 151.5 · Screen recorded 6 November 2026

6 The **posts you published** the **link clicks**.

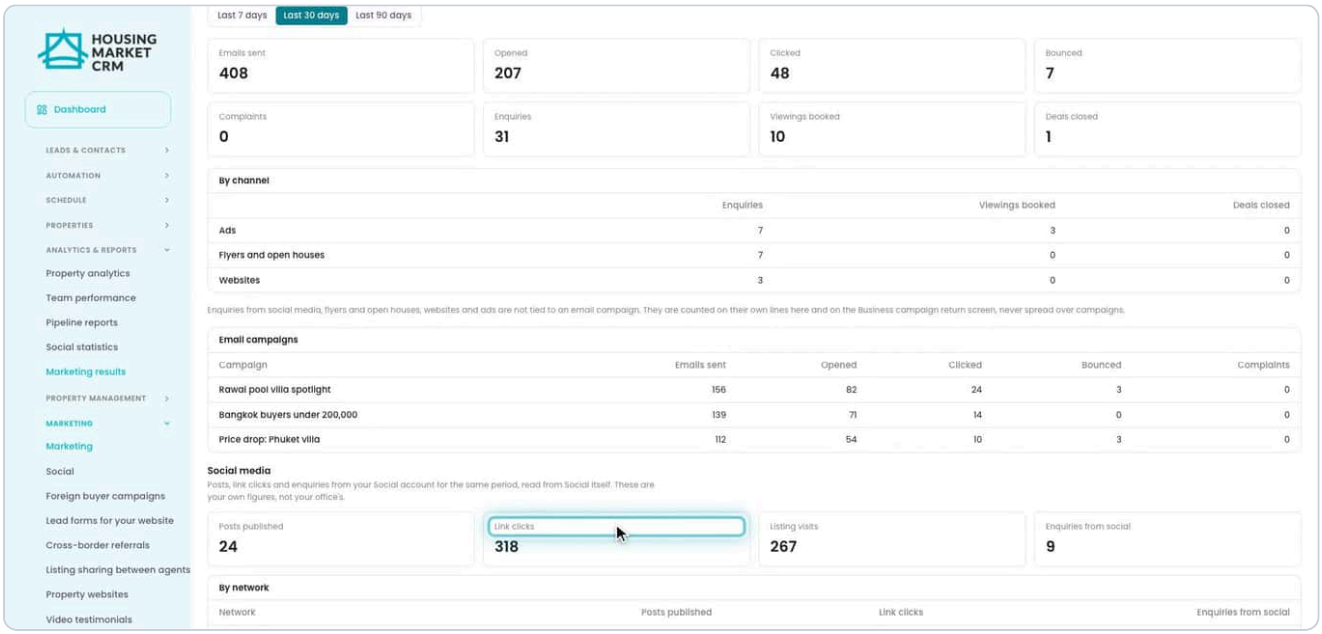


Figure 151.6 · Screen recorded 6 November 2026

7 and the **enquiries** that came from social.

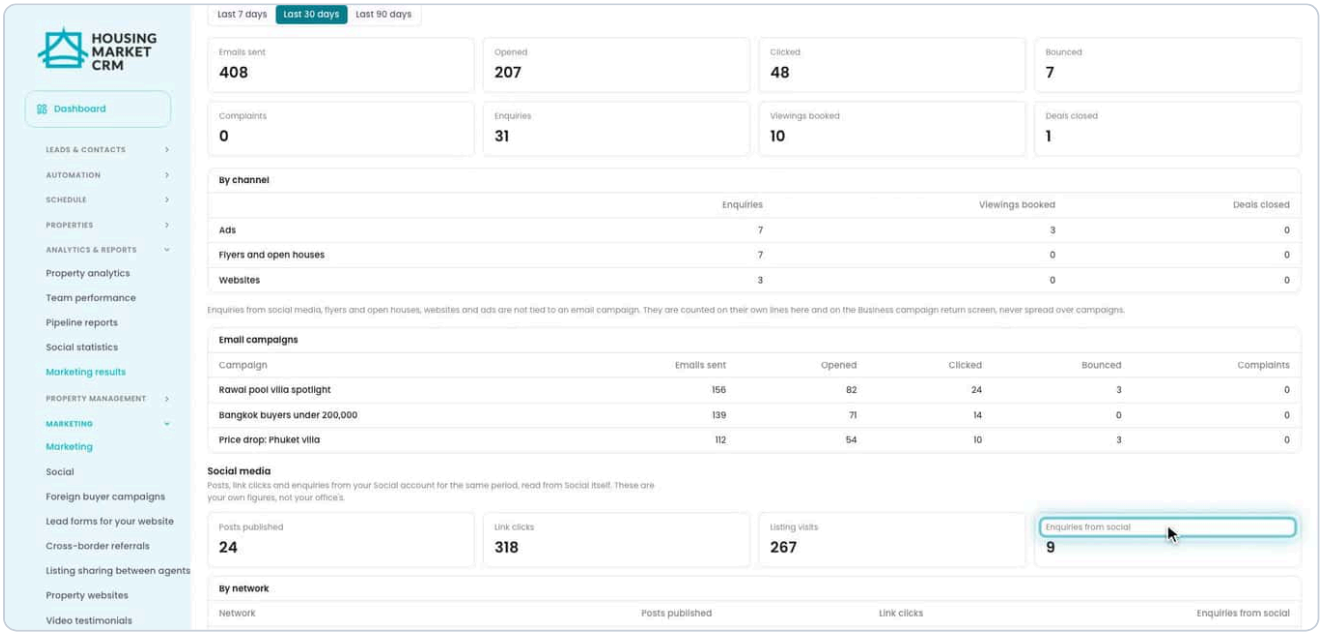


Figure 151.7 · Screen recorded 6 November 2026

8 Each **network** has its own row.

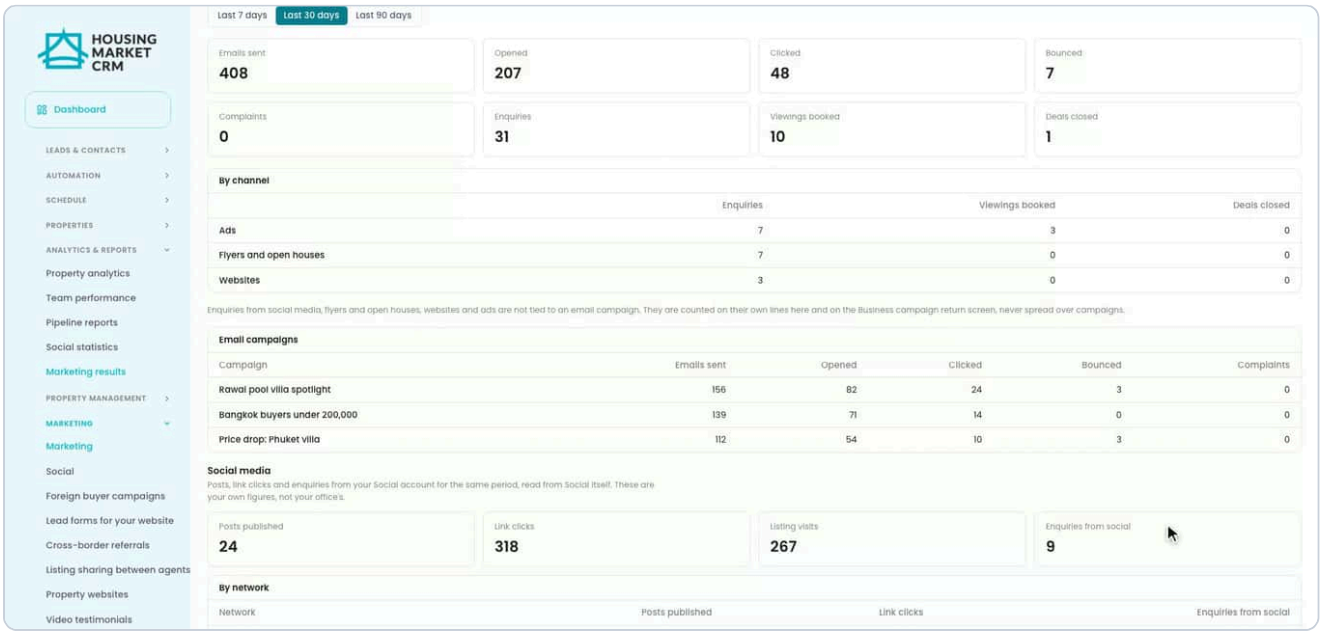


Figure 151.8 · Screen recorded 6 November 2026

9 Posts, clicks and enquiries **per network**.

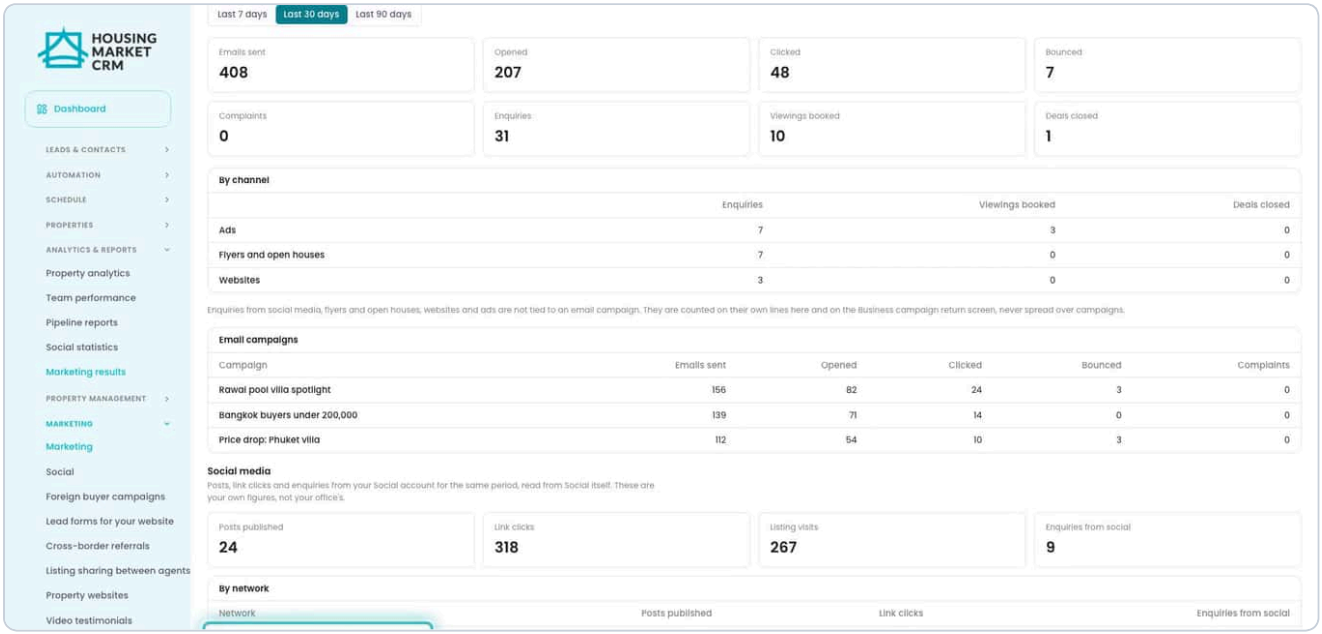


Figure 151.9 · Screen recorded 6 November 2026

10 Enquiries from social are counted **on their own line**, never spread over your email campaigns.

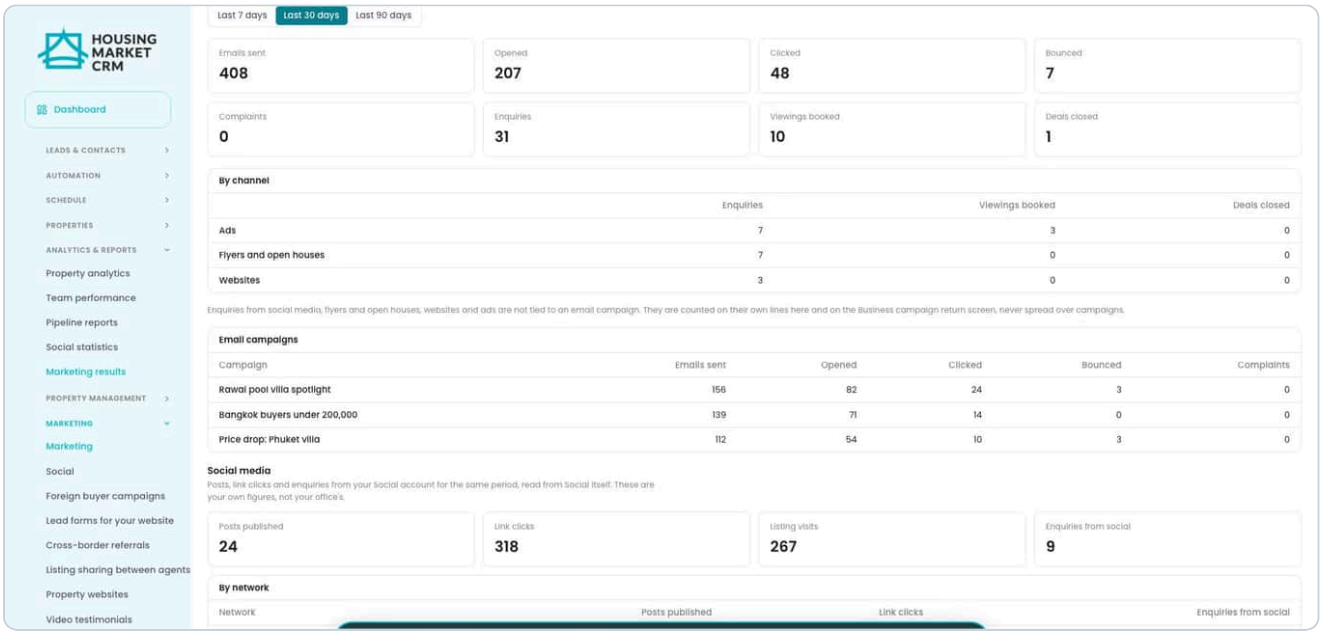


Figure 151.10 · Screen recorded 6 November 2026

RELATED HELP CENTER ARTICLES

What are the Pro marketing tools? faq.housingmarketgroup.com/faq/what-are-the-pro-marketing-tools

152 CHAPTER 152

Recommend a service provider

All plans | For agents | Watch the video

OVERVIEW

Open Service providers, find a mover, cleaner, inspector or other provider in your market, choose Recommend and copy the link for your client. Requests that come through your link appear under My referrals.

Open Service providers in the left menu. It shows the providers listed on Housing Market Services in the market of your portal, and it is part of every plan. The menu item appears when the service marketplace is open in your market.

- Use the filters to find one: Category (movers, cleaners, inspectors, lawyers, photographers, handymen or interior designers), City or the whole market, and Business name.
- Each card shows the provider's rating and number of reviews, a price to start from where it has one, and a Verified or Featured label where it has one. Choose Open profile to read the provider's page.
- Choose Recommend to make a link for your client. Choose Copy link and send it to the client in your own message.

The link opens the provider's page on the portal and carries your referral. Your referral is tracked for 30 days from the day the link was made, and the screen shows the date it ends. If referral tracking is not available, the screen says the link does not carry your referral code.

When a client sends a request to a provider through your link, it appears under My referrals, with who contacted which business and its status: Waiting for the provider, Accepted, Declined, Completed, Cancelled or Expired. The totals of requests, accepted and completed are shown at the top.

From the Help Center: **How do I recommend a service provider to a client?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

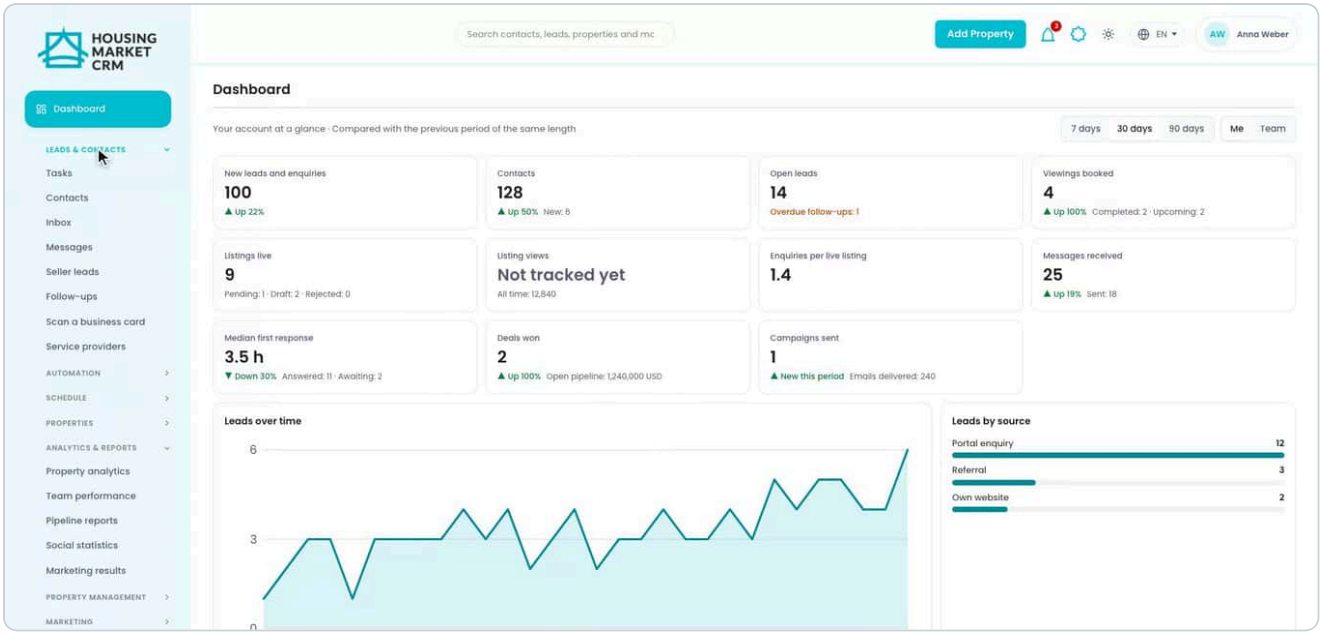


Figure 152.1 · Screen recorded 1 November 2026

2 Click **Service providers** in the left menu.

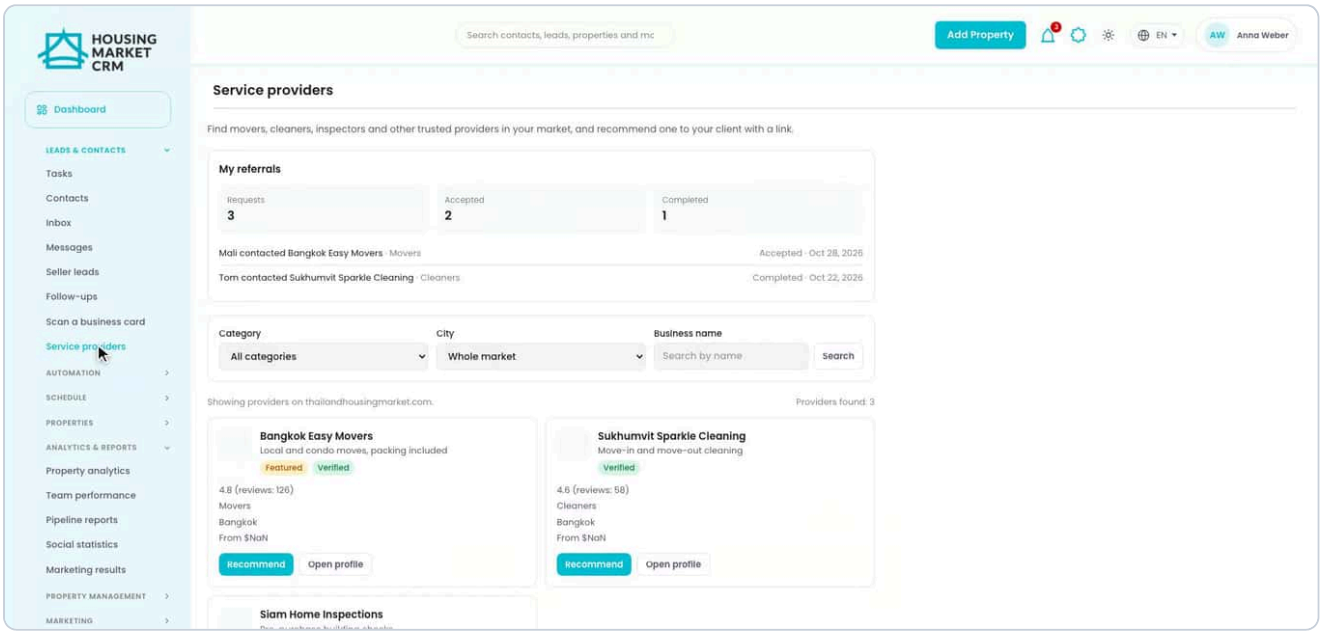


Figure 152.2 · Screen recorded 1 November 2026

3 Filter by **category** and **city**.

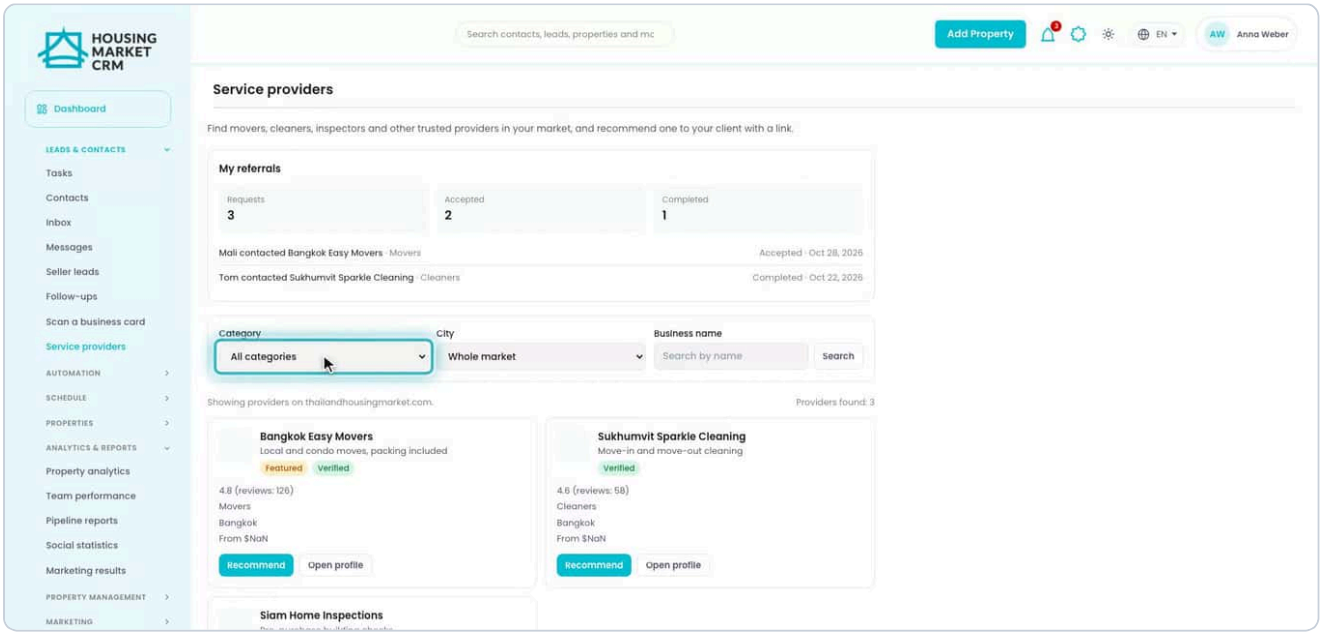


Figure 152.3 · Screen recorded 1 November 2026

4 Click **Recommend**.

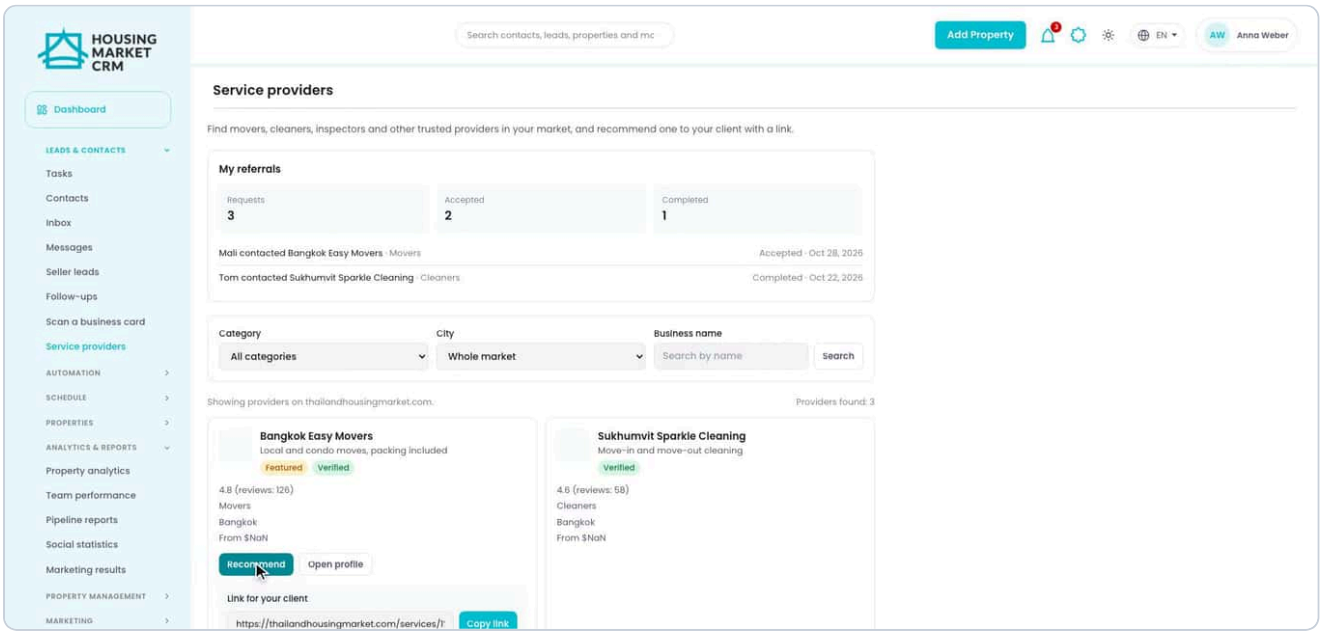


Figure 152.4 · Screen recorded 1 November 2026

5 Copy link and send it to your client.

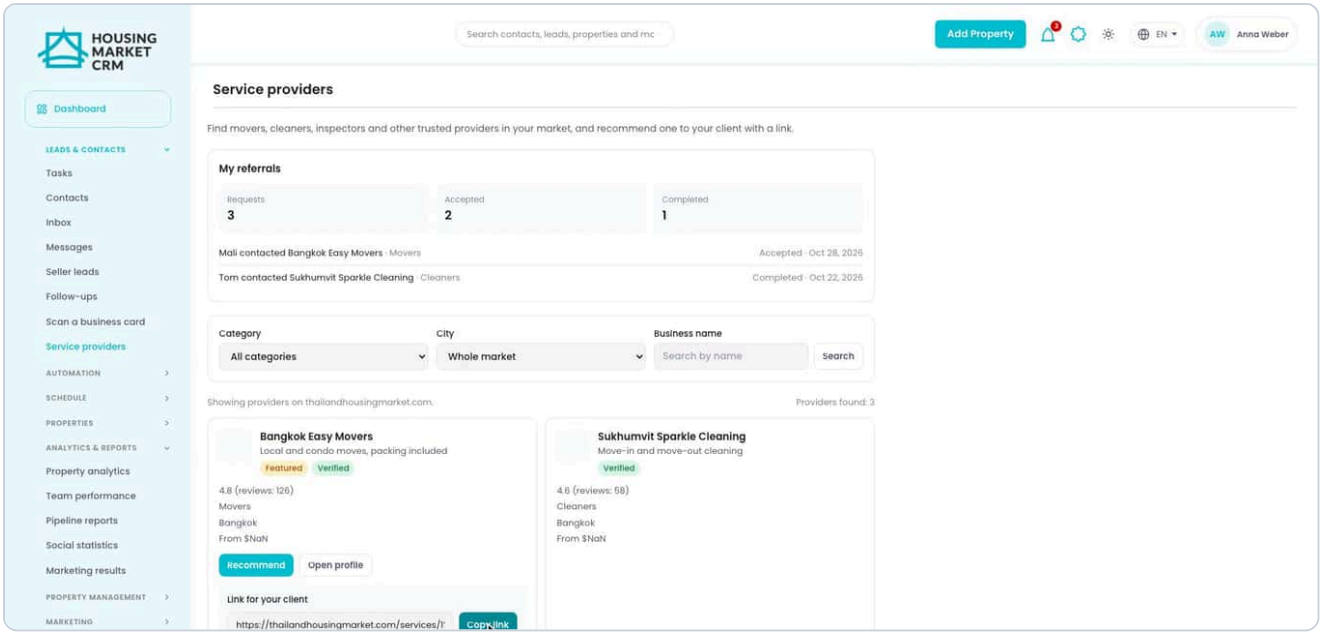


Figure 152.5 · Screen recorded 1 November 2026

6 Every link you sent is under My referrals.

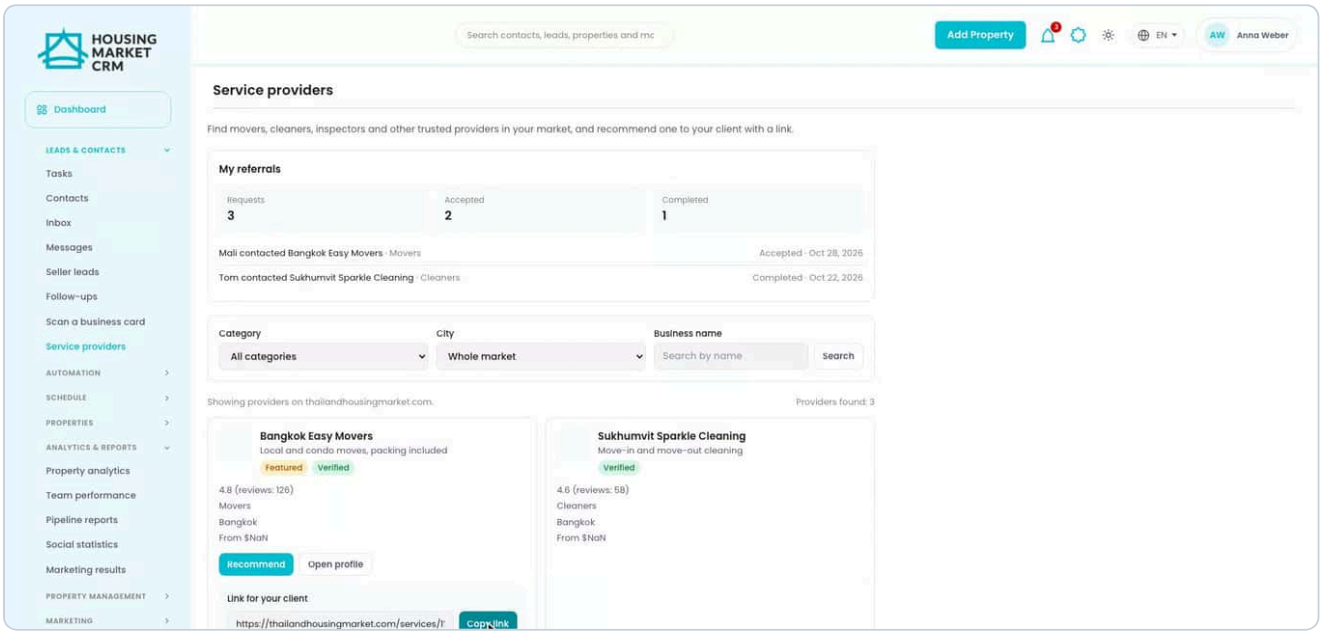


Figure 152.6 · Screen recorded 1 November 2026

7 Payment is agreed **between your client and the provider**.

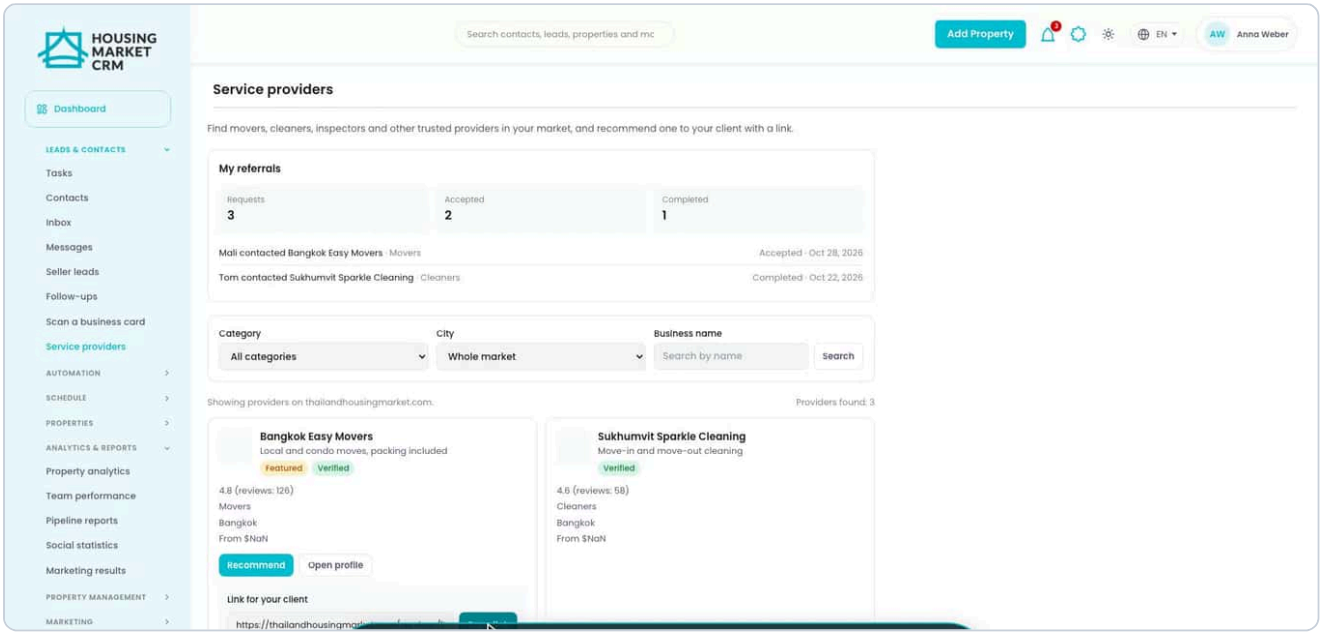


Figure 152.7 · Screen recorded 1 November 2026

RELATED HELP CENTER ARTICLES

What are the Business marketing tools?	faq.housingmarketgroup.com/faq/what-are-the-business-marketing-tools

PART 12

Plans and billing

153 Choose a plan

154 Upgrade your plan

155 Update billing details

156 Refer an agent

157 Download invoices

153 CHAPTER 153

Choose a plan

All plans | For agents, office managers | Watch the video

OVERVIEW

The core CRM is free and stays free. Two paid plans add the parts that reach outside the CRM.

There are three plans. The free one is the whole core CRM, it takes no card, and it is not a trial that expires. It carries the inbox and contact timelines, the lead board, contact records with duplicate detection and merging, browsing history on a lead, the calendar and dated follow-ups, the notification centre, properties kept in the CRM itself, the daily figures for your own listings and where their viewers come from, Housing Market Insights prompts for listings that are underperforming, the document vault, and your reviews, verification badges and profile analytics. It is for 1 user, and leads and contacts are not capped on it.

Pro is 29 USD per month for 1 user and adds the tools that do the work for you: lead scoring, reverse matching, follow-up sequences and nurture emails, the AI listing description writer, online viewing booking with calendar invites, publishing a property to the portal, email campaigns with per-campaign figures, uploaded contact lists with consent recorded, the branded vendor report, pipeline reports, Housing Market Ads campaigns and audiences, WhatsApp templates, business-card scan, contracts signed on screen, and lease records.

Business is 99 USD per month and turns it into a team system: up to 10 users included, then 5 USD per additional user per month, admin, manager and agent roles with grades inside the manager role, lead-assignment rules, team leaderboards and performance reporting, an audit log, commission and deal tracking with a pipeline forecast, market estimate reports with a branded PDF, a client portal with a weekly email to each seller, the open API and webhooks, and a weekly email to the owner.

Every plan is billed monthly and there is no annual commitment. Importing from a file is free on every plan, the free one included: properties, contacts, leads and deals, up to 5,000 rows per file. Keeping your listings in step with a feed automatically every day is a separate paid subscription, XML API Sync.

You change plan yourself: log in, open Plan and billing and choose Move to Pro or Move to Business. See "How do I upgrade, add users or cancel?".

From the Help Center: **Is Housing Market CRM free?**

STEP BY STEP

1 Open **Plan and billing** from Settings.

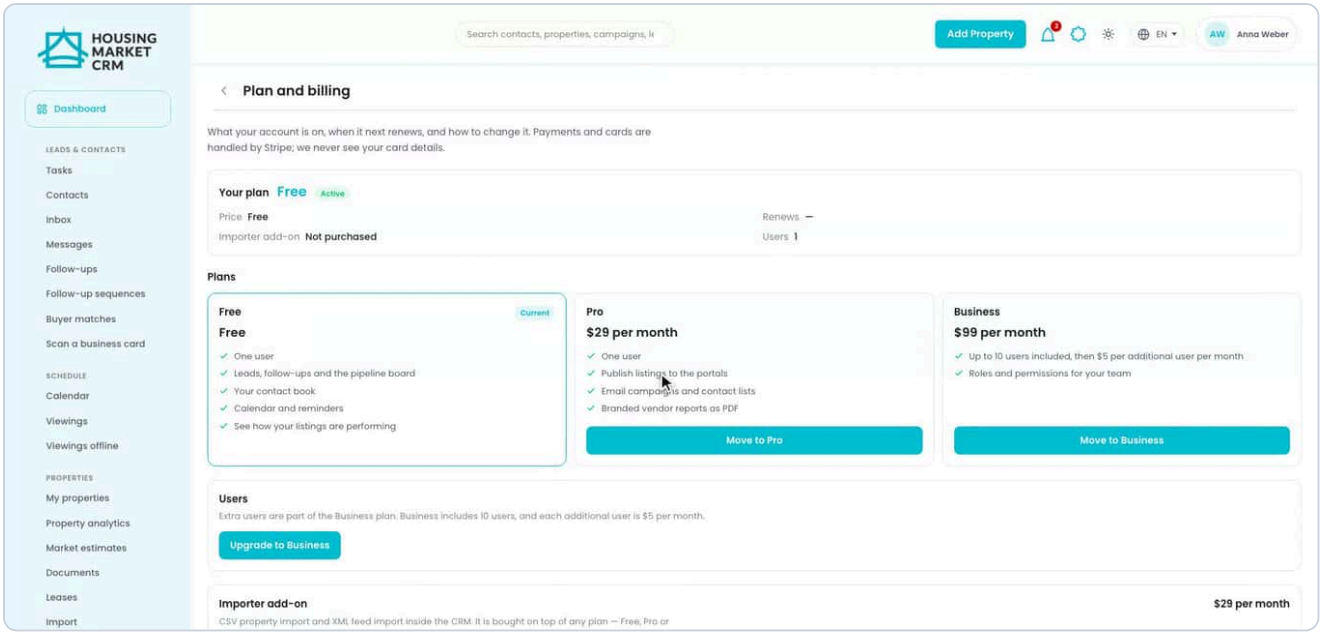


Figure 153.1 · Screen recorded 24 September 2026

2 **Your plan** shows what you are on today.

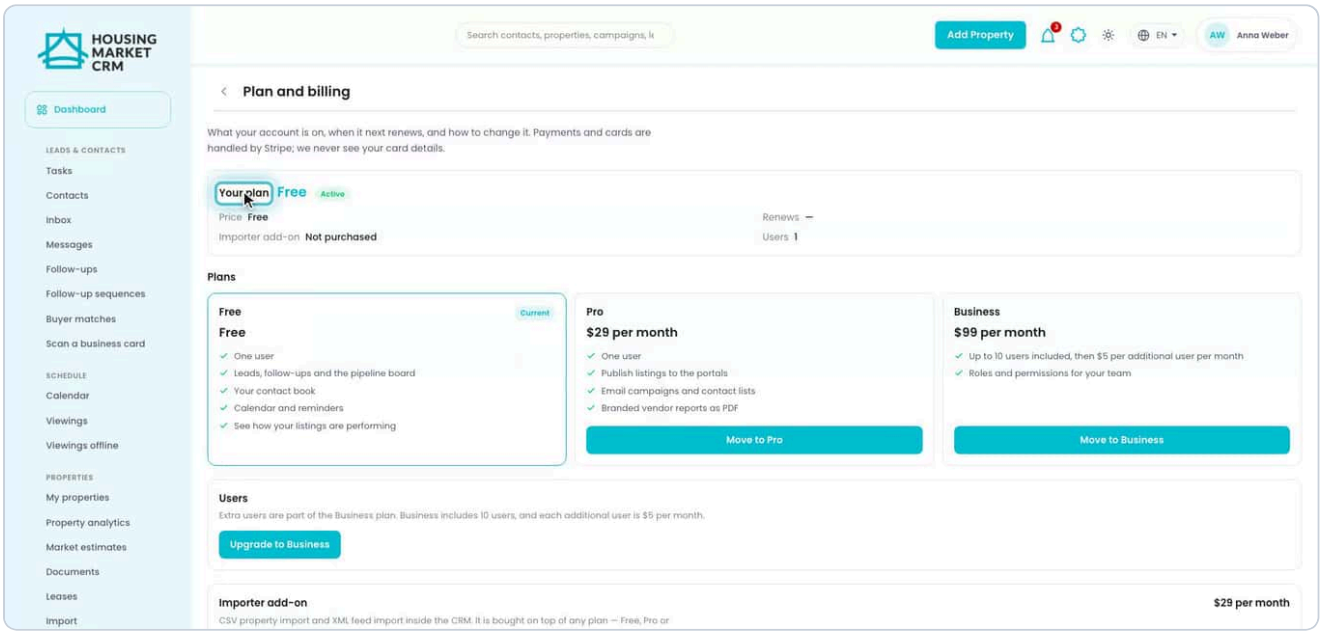


Figure 153.2 · Screen recorded 24 September 2026

3 Compare the three **plans** side by side.

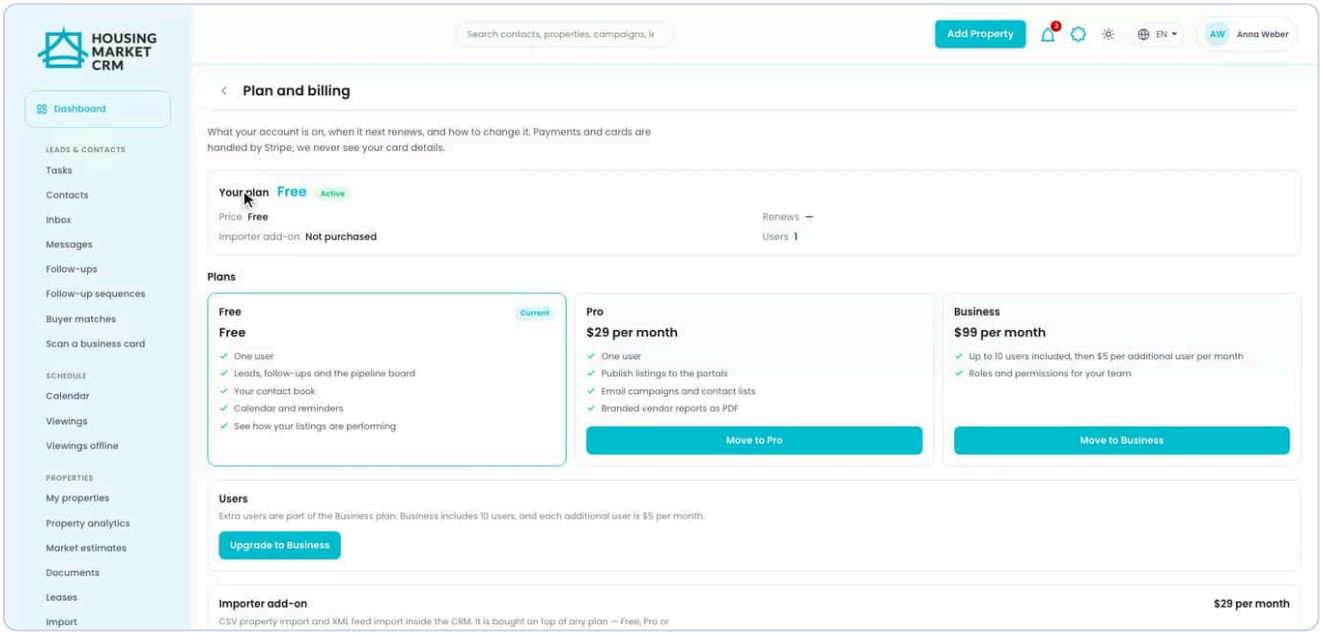


Figure 153.3 · Screen recorded 24 September 2026

4 **Free**: one user, leads, pipeline, contacts and calendar.

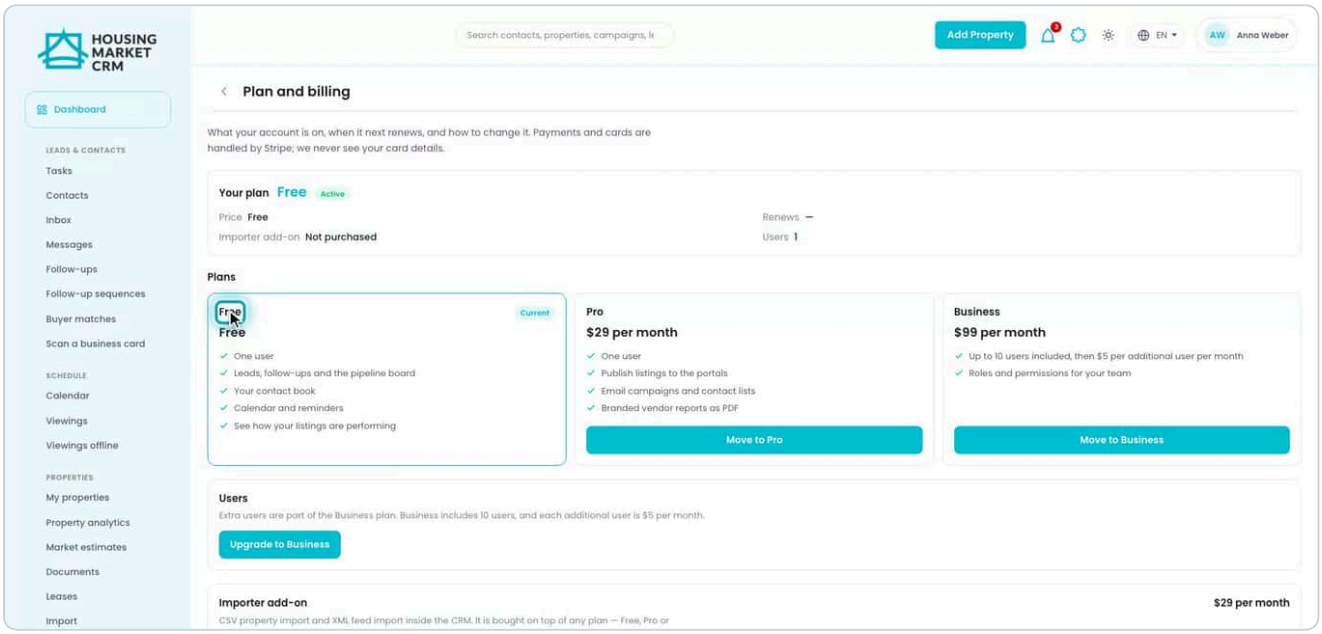


Figure 153.4 · Screen recorded 24 September 2026

5 **Pro**, $29 a month: publish to portals, campaigns, lead scoring.

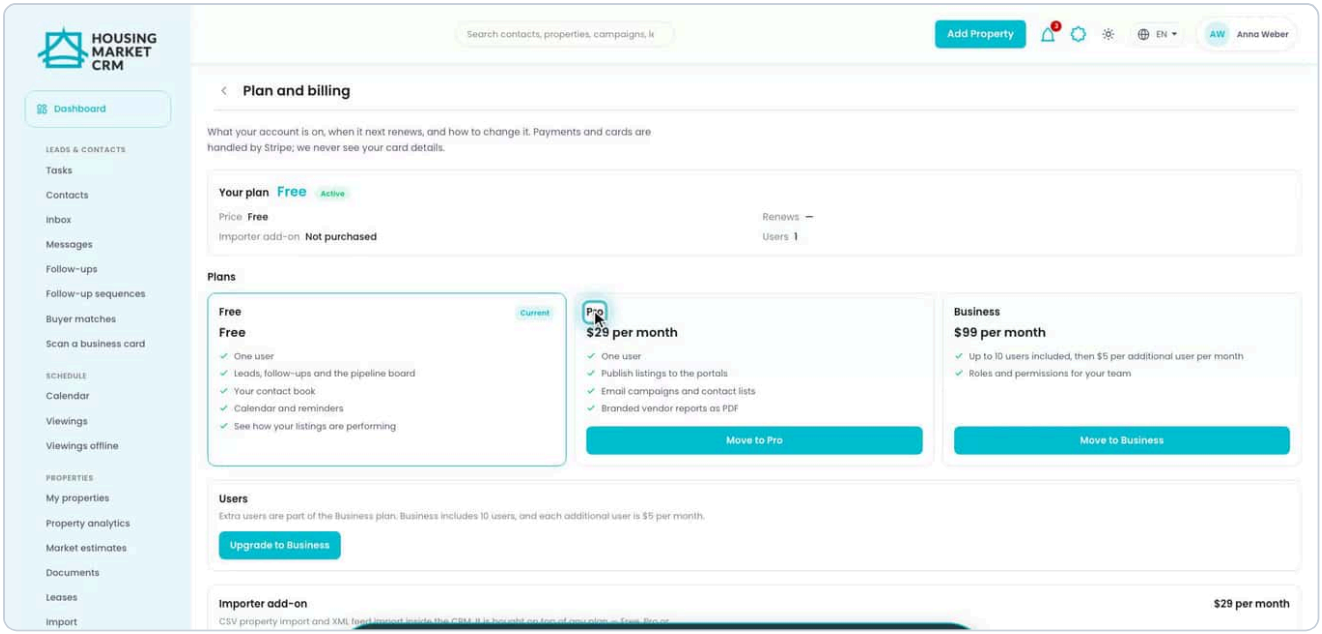


Figure 153.5 · Screen recorded 24 September 2026

6 **Business**, $99 a month: 10 users, roles, routing, team reports.

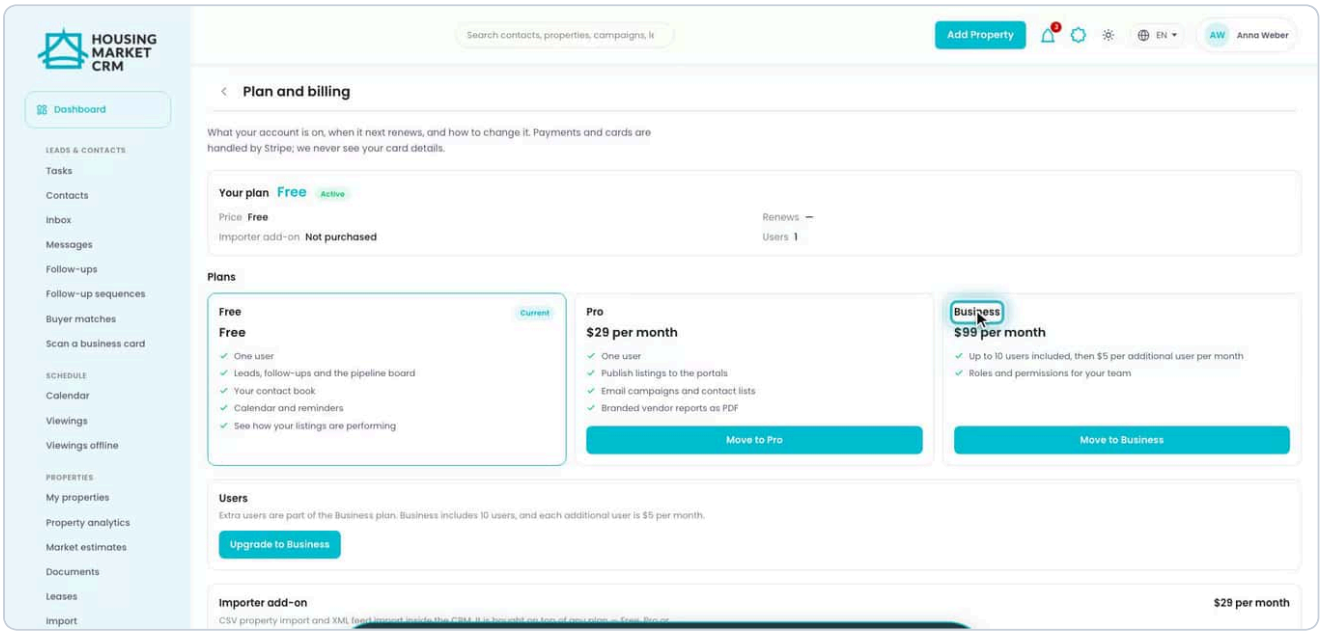


Figure 153.6 · Screen recorded 24 September 2026

7 The **Importer add-on** ($29/month) bulk-imports properties.

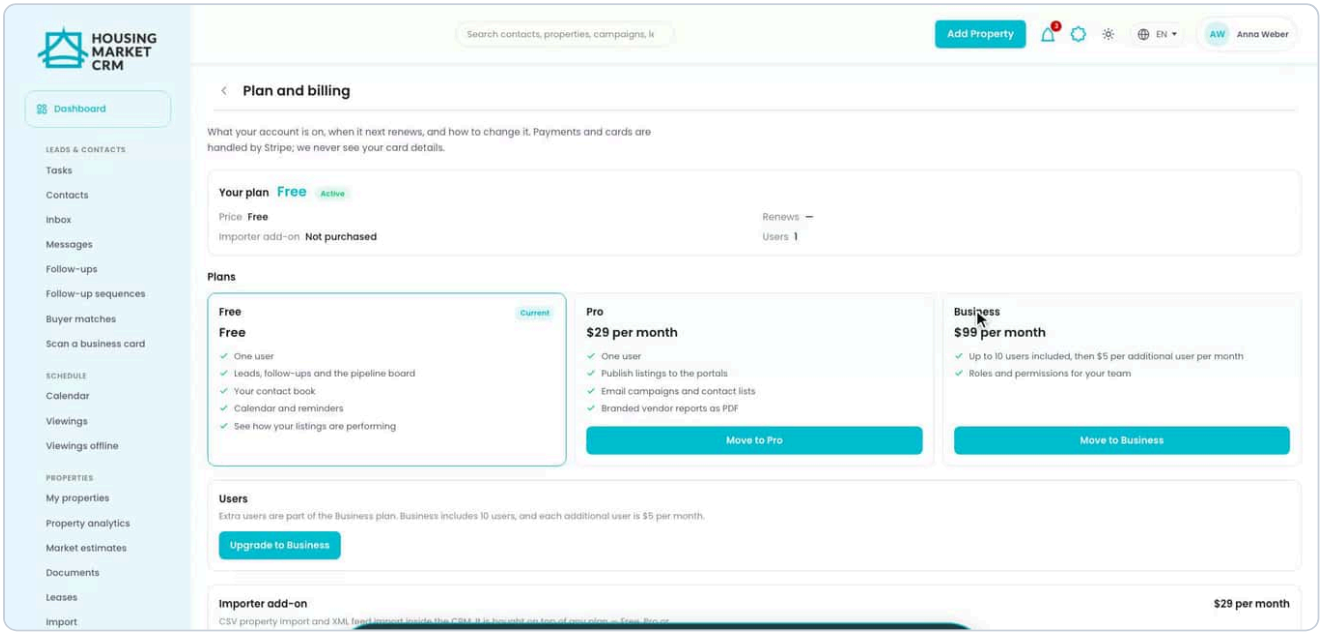


Figure 153.7 · Screen recorded 24 September 2026

RELATED HELP CENTER ARTICLES

How do I upgrade, add users or cancel?	faq.housingmarketgroup.com/faq/how-do-i-upgrade-add-users-or-cancel

154 CHAPTER 154

Upgrade your plan

All plans | For agents, office managers | Watch the video

OVERVIEW

In Plan and billing: choose Move to Pro or Move to Business, Change users on Business, and Manage billing to change your card or cancel.

On a computer, choose Settings (the gear) at the top of the screen and then Plan and billing. Only the account owner can buy or change anything; colleagues on a Business account see that the account is billed through the owner.

Moving to Pro or Business

Under Plans, choose Move to Pro (29 USD per month) or Move to Business (99 USD per month) and pay in the secure checkout. You come back to Plan and billing, which shows your new plan. Prices are in US dollars everywhere.

Users on Business

Business includes up to 10 users. To add more, choose Change users and set the total; each additional user is 5 USD per month, charged or credited pro rata on the next invoice. You cannot go below the users you have plus the ones you have invited. The card is on every plan, not only Business: on Free and Pro it explains that extra users come with Business and offers that upgrade instead of a control that could not work.

Where your own account cannot complete the change online, the card says so and asks you to contact support rather than drawing a button that would fail. And setting this number is only about how many users you are paying for — the people themselves join by email invitation from the Team page, never by being typed in here.

Importing from a file

Importing from a file is free on every plan, so there is nothing to buy for it here. An account that already has the Importer add-on keeps it as before.

Changing your card, invoices and cancelling

Choose Manage billing. It opens a secure billing page, where you can change plan, update your card, download invoices or cancel, and then brings you back. When a paid plan ends, the account returns to the free plan: nothing is deleted and the core CRM keeps working. Cancelling the Importer turns off only the Importer.

If Manage billing cannot open, the CRM tells you why instead of simply failing. It says that billing management is temporarily unavailable, that your plan and your data are not affected, and asks you to contact support so we can make the change for you. That sentence means the payment provider refused the request because of the way the account is set up, so pressing the button again will not help — and nothing has been charged, cancelled or changed in the meantime.

From the Help Center: **How do I upgrade, add users or cancel?**

STEP BY STEP

1. Locked features show which plan they belong to.

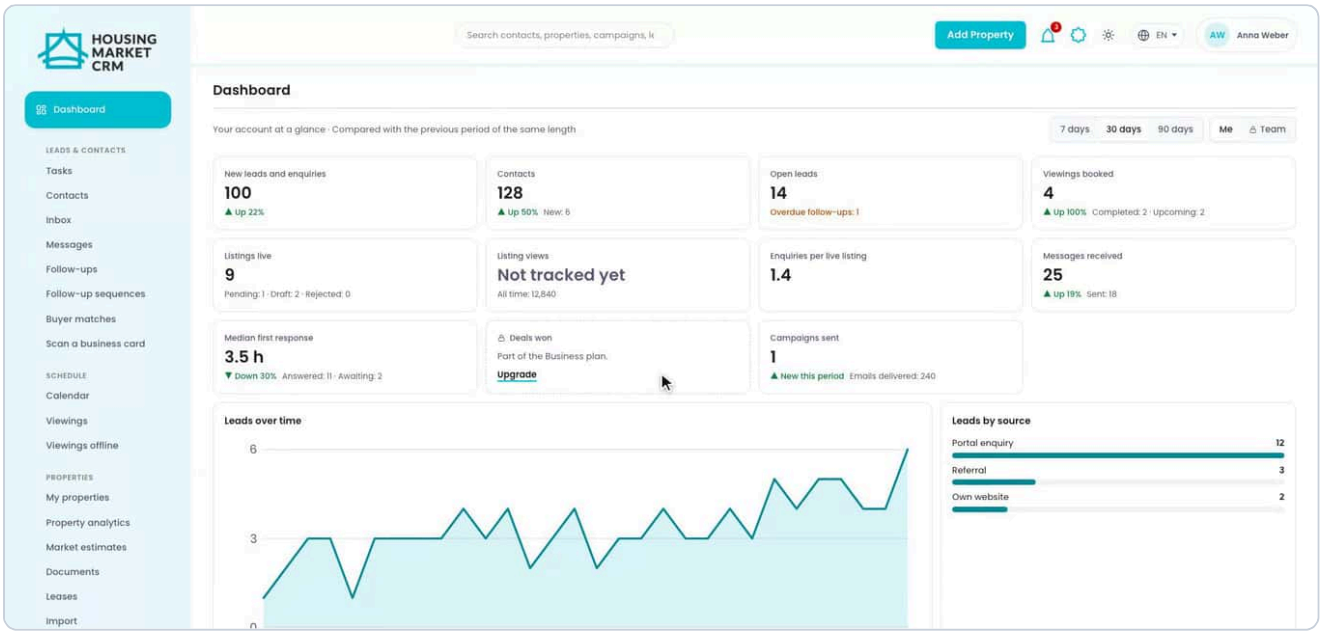


Figure 154.1 · Screen recorded 24 September 2026

2 Here, **Deals won** is part of the **Business** plan.

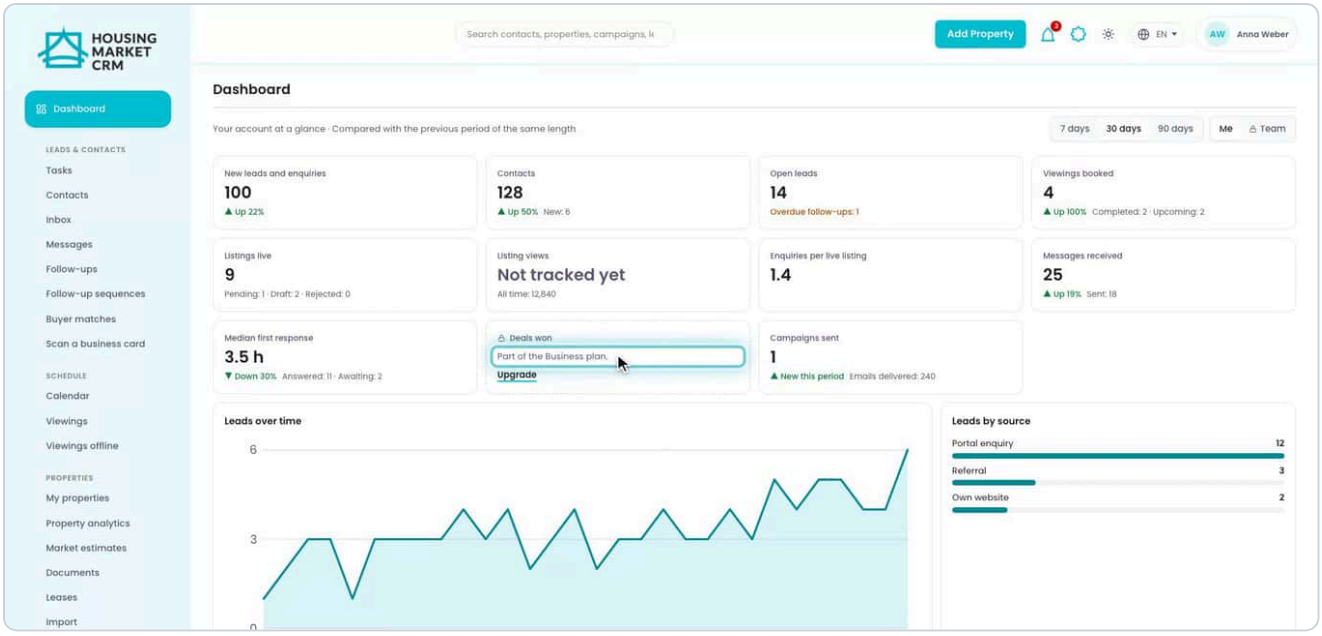


Figure 154.2 · Screen recorded 24 September 2026

3 Click **Upgrade**.

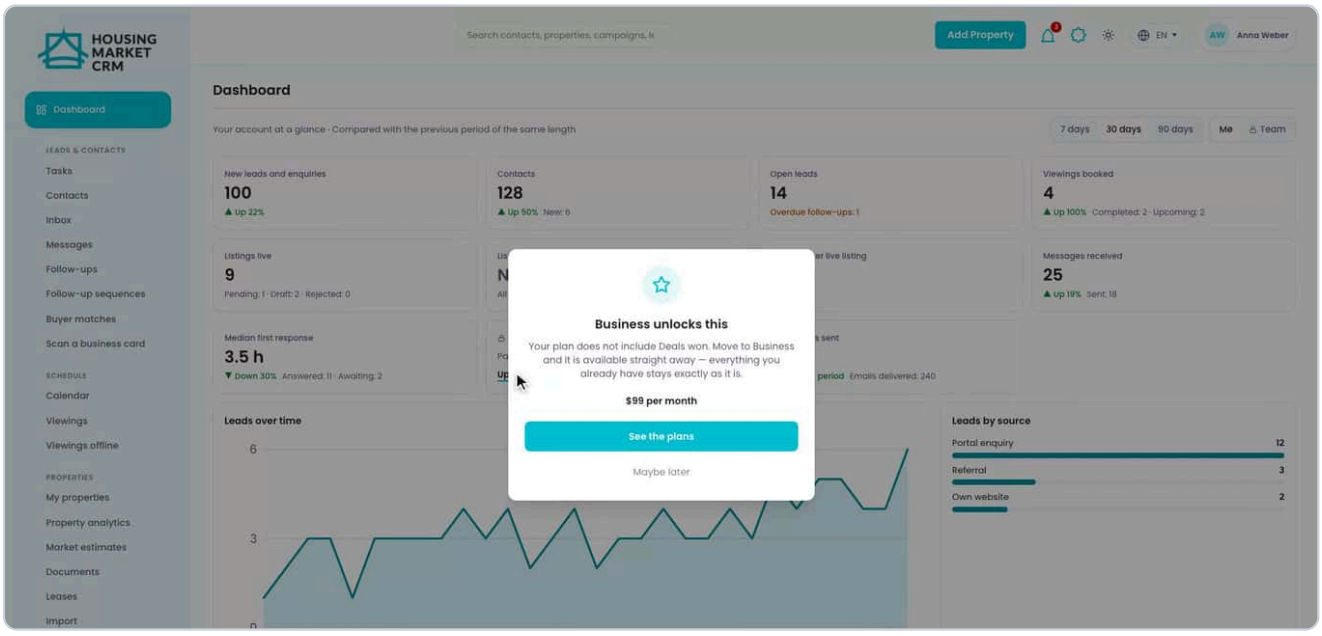


Figure 154.3 · Screen recorded 24 September 2026

4 The prompt explains what the plan includes.

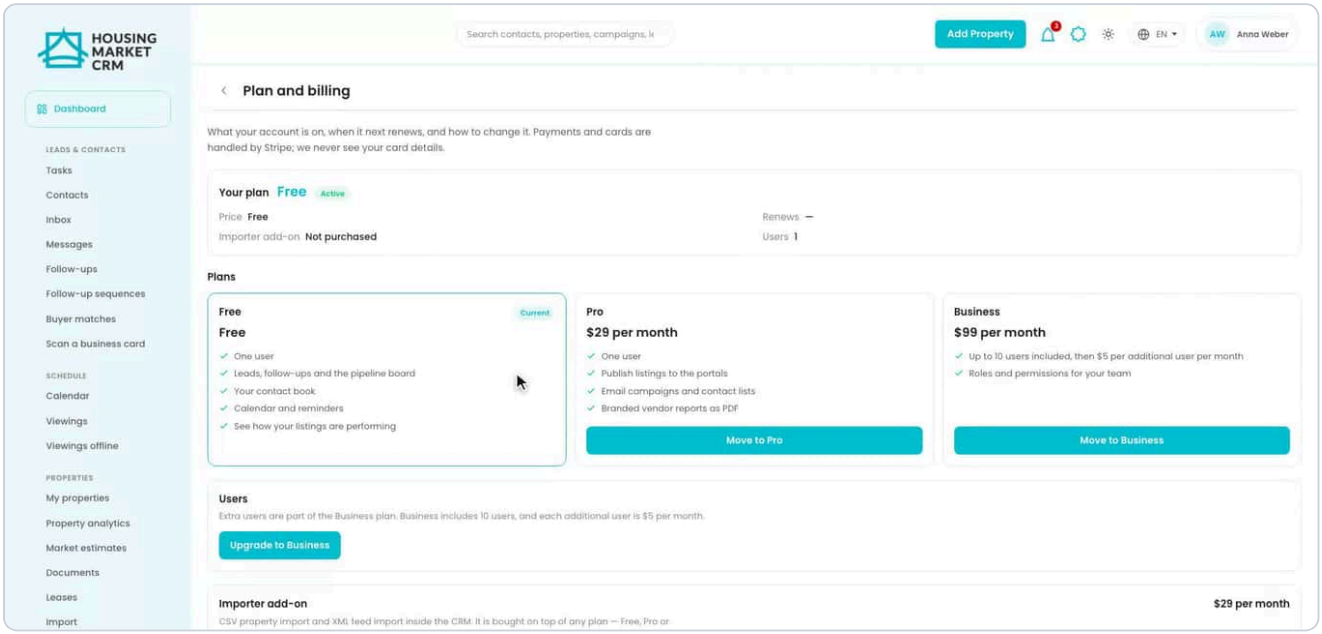


Figure 154.4 · Screen recorded 24 September 2026

5 Open **Plan and billing**.

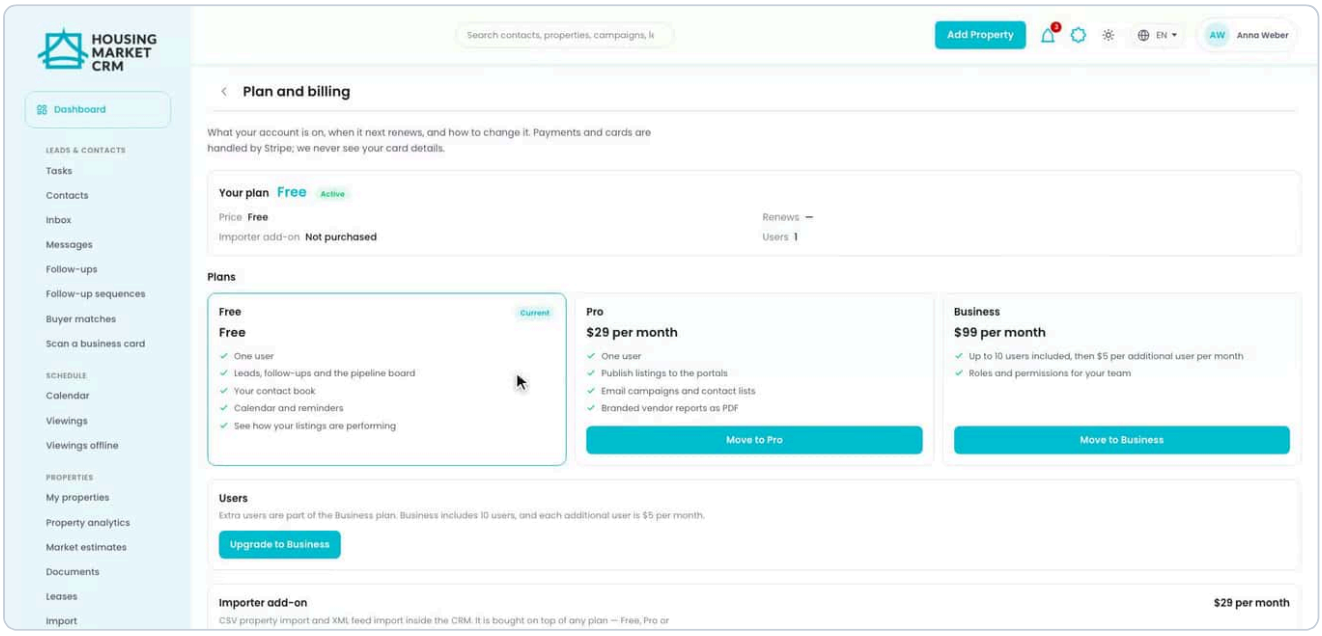


Figure 154.5 · Screen recorded 24 September 2026

6 Click **Move to Pro** ($29/month) or **Move to Business** ($99/month, 10 users).

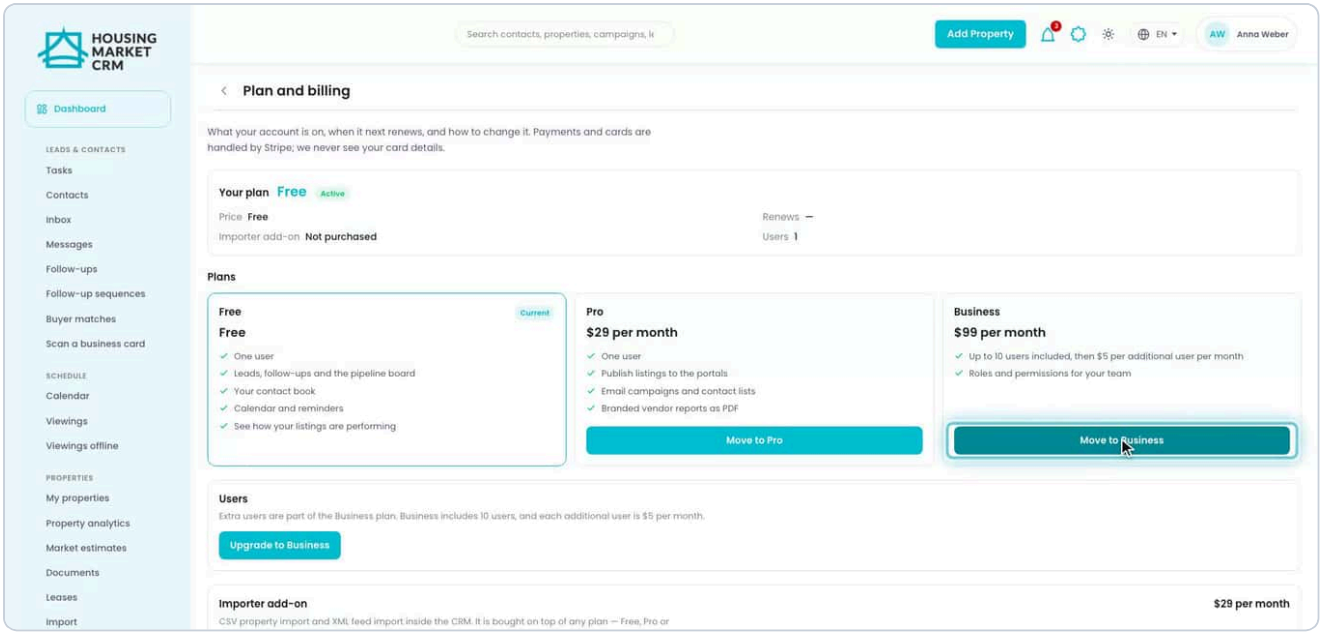


Figure 154.6 · Screen recorded 24 September 2026

7 Stripe’s secure checkout opens — enter your card details there.

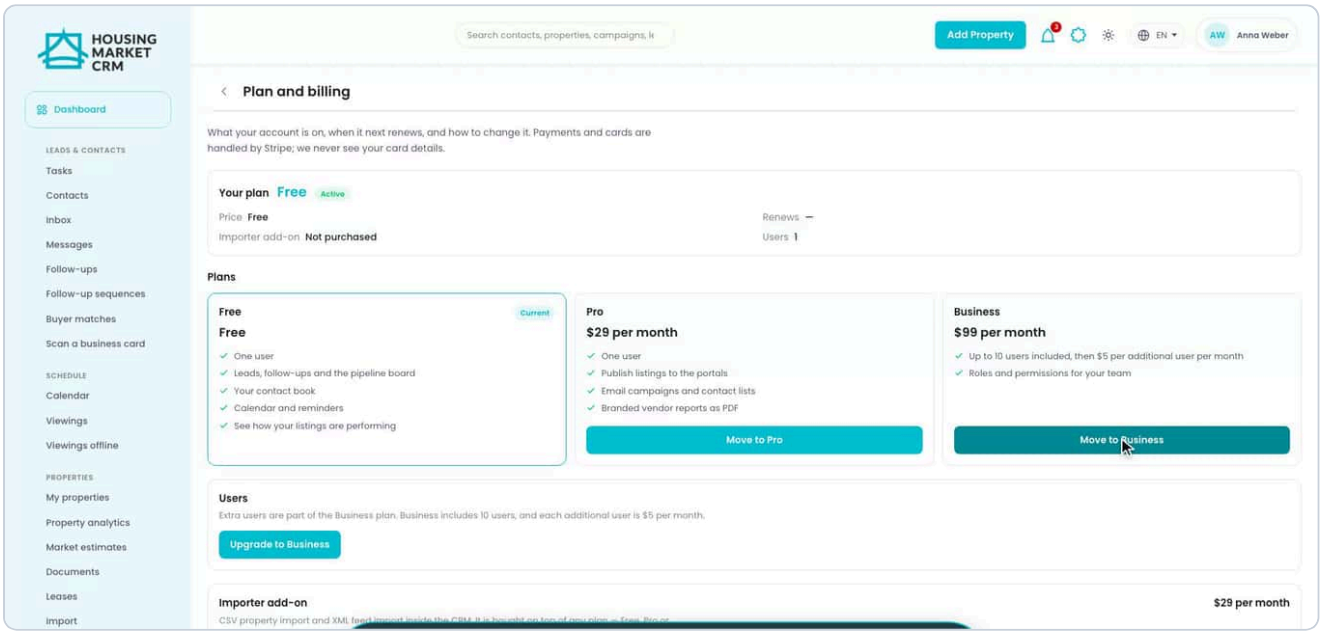


Figure 154.7 · Screen recorded 24 September 2026

8 Back in the CRM, the new features are **unlocked at once**.

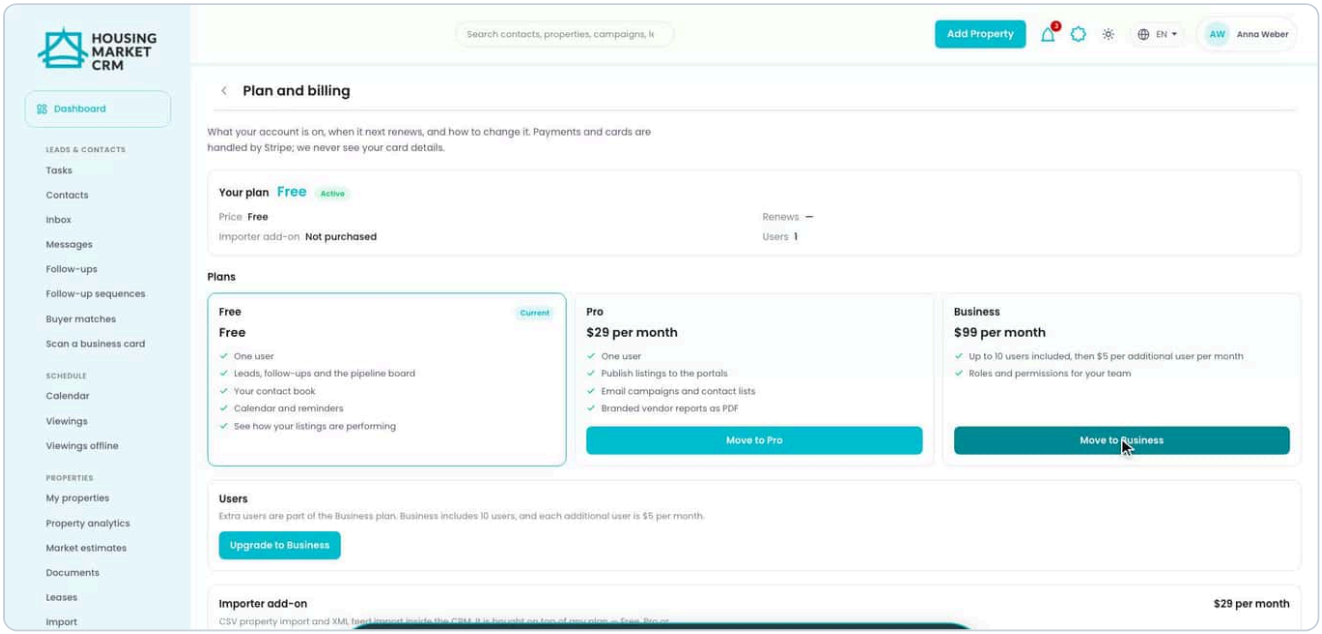


Figure 154.8 · Screen recorded 24 September 2026

RELATED HELP CENTER ARTICLES

Is Housing Market CRM free? faq.housingmarketgroup.com/faq/is-housing-market-crm-free

155 CHAPTER 155

Update billing details

All plans | For admins | Watch the video

OVERVIEW

In Plan and billing: choose Move to Pro or Move to Business, Change users on Business, and Manage billing to change your card or cancel.

On a computer, choose Settings (the gear) at the top of the screen and then Plan and billing. Only the account owner can buy or change anything; colleagues on a Business account see that the account is billed through the owner.

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Choose Manage billing. It opens a secure billing page, where you can change plan, update your card, download invoices or cancel, and then brings you back. When a paid plan ends, the account returns to the free plan: nothing is deleted and the core CRM keeps working. Cancelling the Importer turns off only the Importer.

If Manage billing cannot open, the CRM tells you why instead of simply failing. It says that billing management is temporarily unavailable, that your plan and your data are not affected, and asks you to contact support so we can make the change for you. That sentence means the payment provider refused the request because of the way the account is set up, so pressing the button again will not help — and nothing has been charged, cancelled or changed in the meantime.

From the Help Center: **How do I upgrade, add users or cancel?**

STEP BY STEP

1. Open your **Housing Market CRM** account.

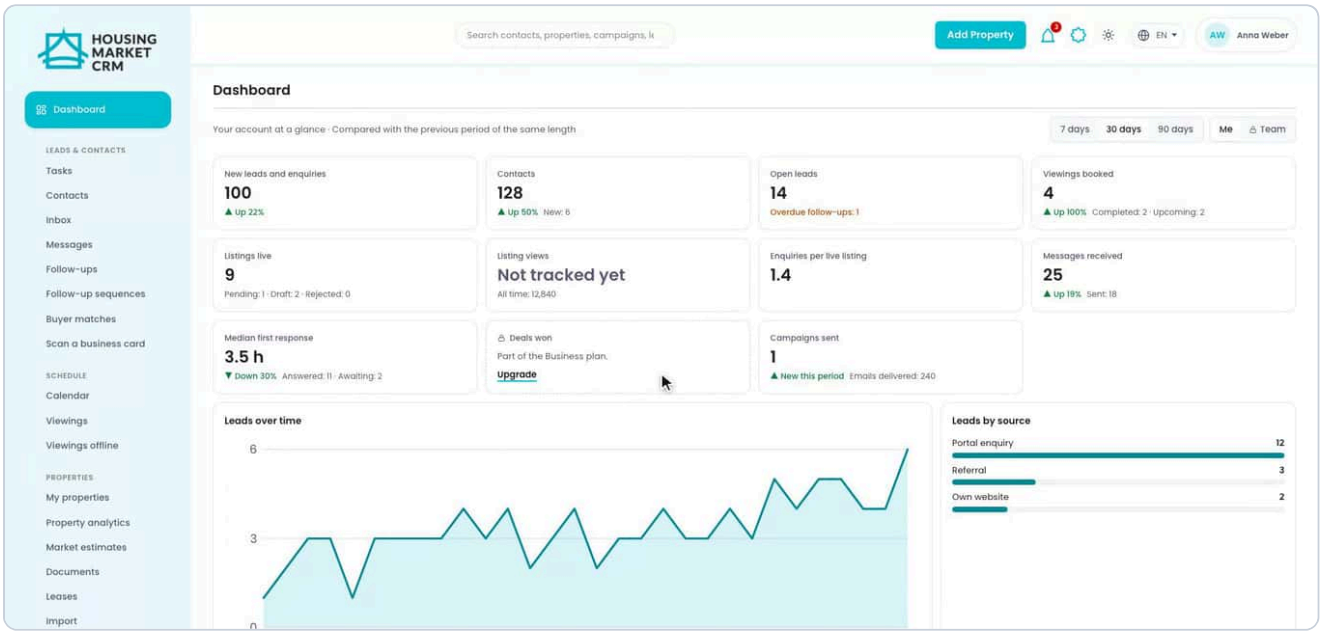


Figure 155.1 · Screen recorded 24 September 2026

2 Click the **Settings** icon at the top.

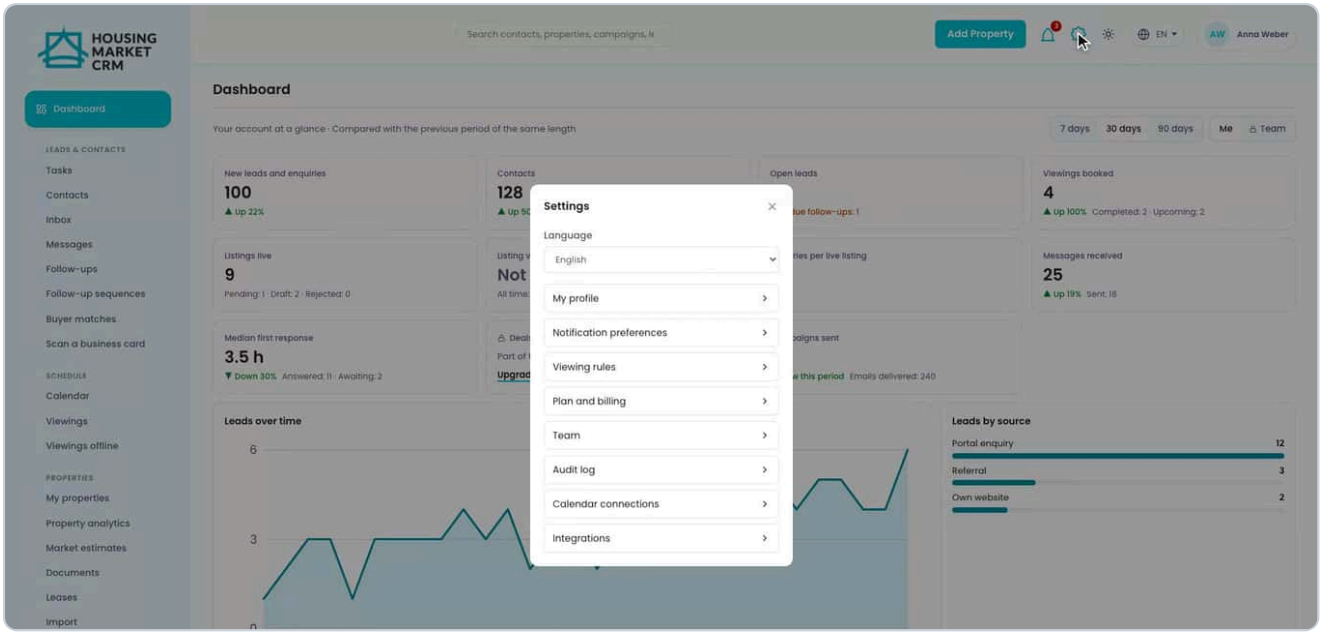


Figure 155.2 · Screen recorded 24 September 2026

3 Choose **Plan and billing**.

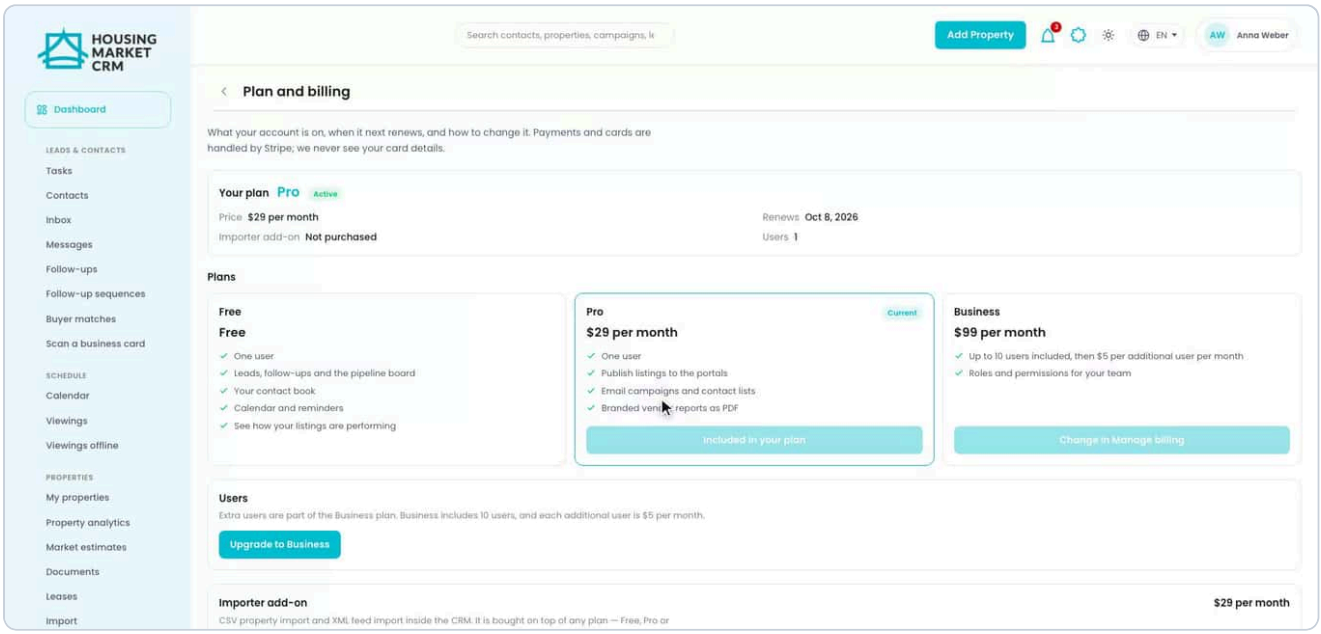


Figure 155.3 · Screen recorded 24 September 2026

4 **Your plan** shows the plan, renewal date and add-ons.

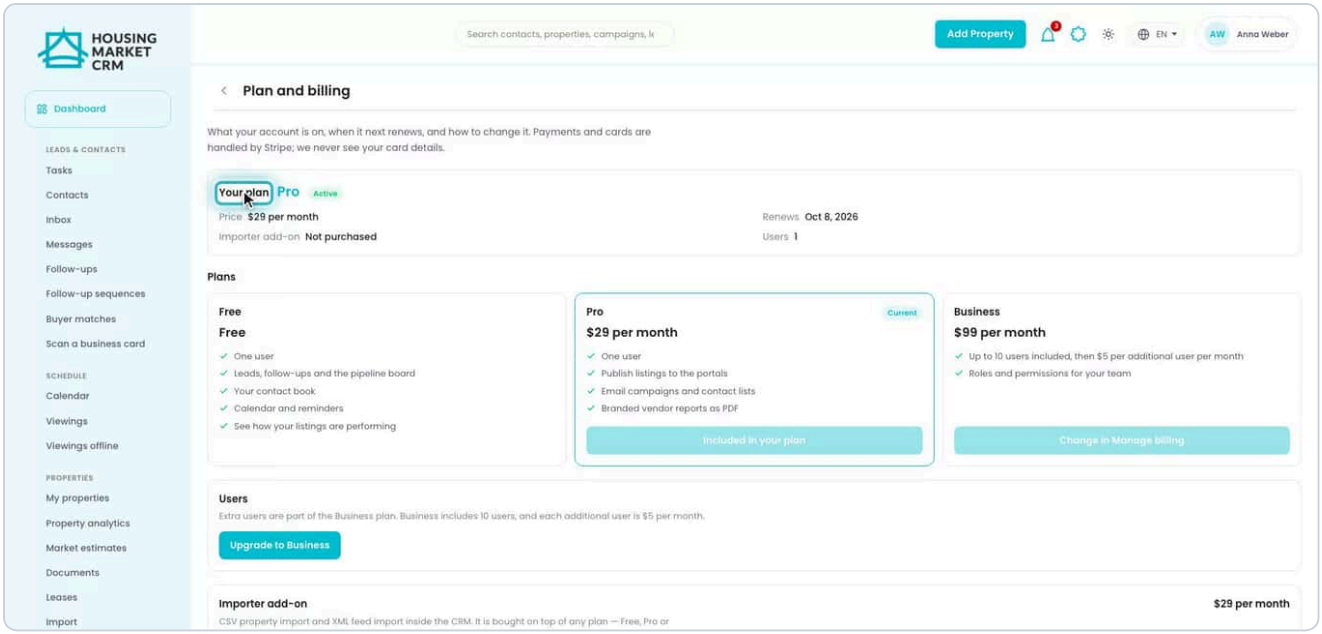


Figure 155.4 · Screen recorded 24 September 2026

5 Click **Manage billing**.

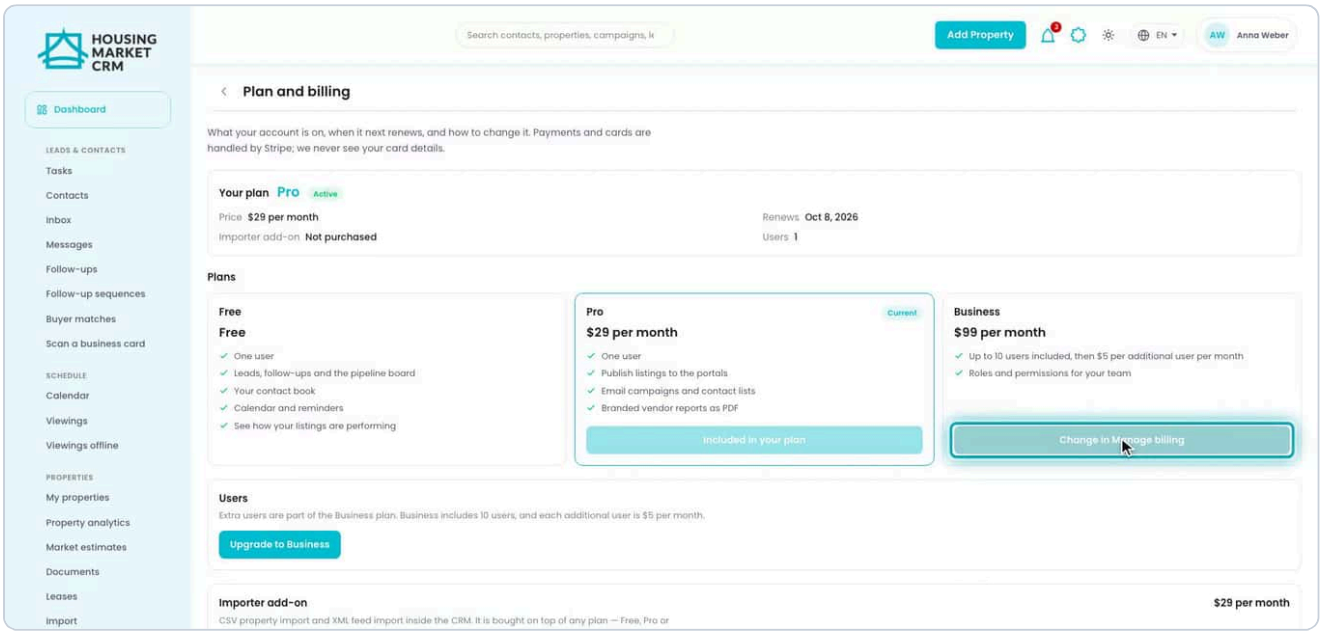


Figure 155.5 · Screen recorded 24 September 2026

6 Stripe’s secure page opens: change your **card**, **details** or **download invoices**.

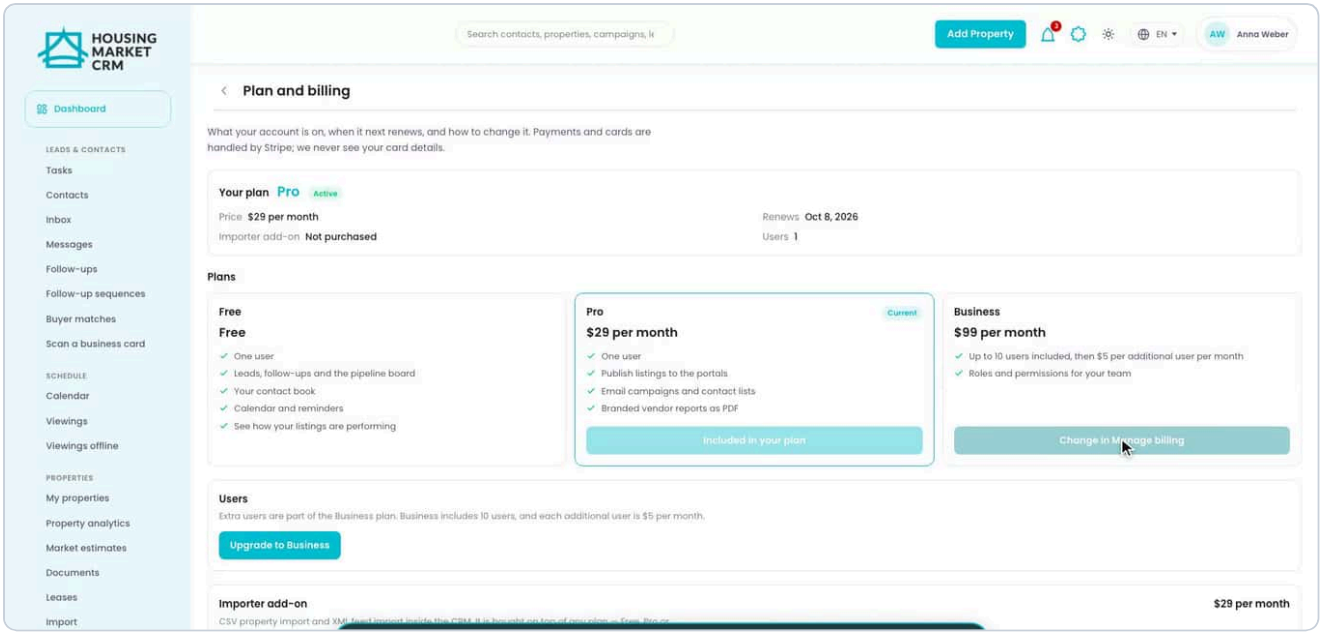


Figure 155.6 · Screen recorded 24 September 2026

7 The CRM never sees your **card number**.

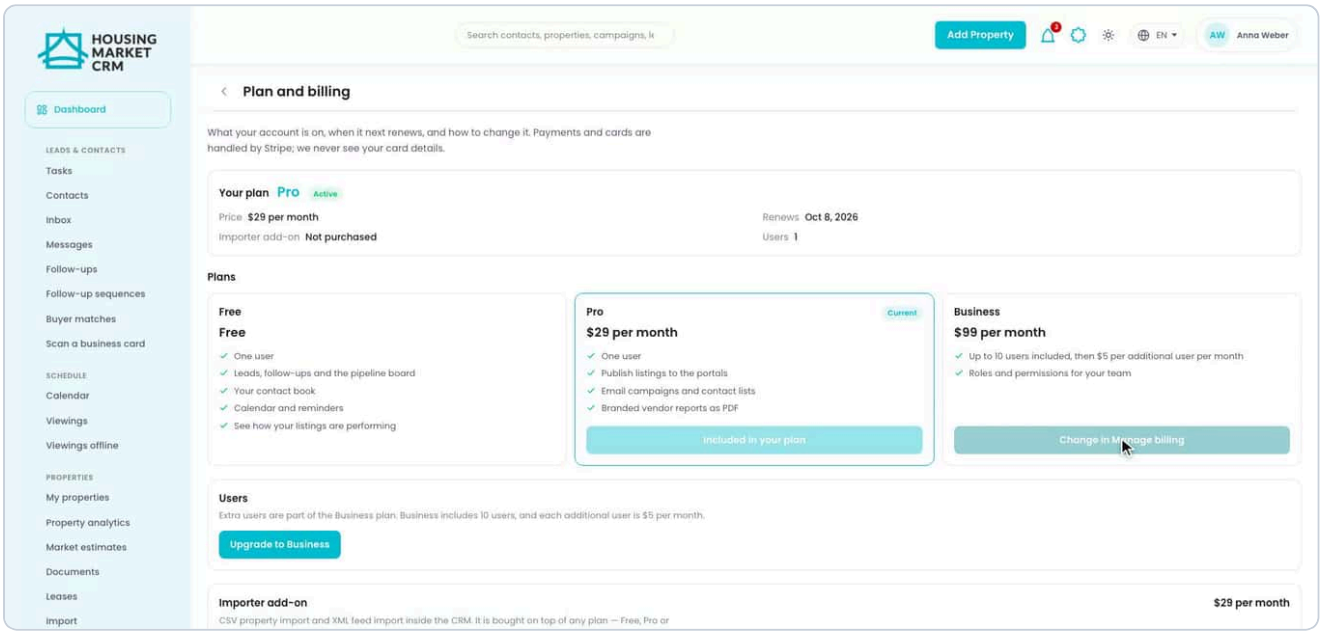


Figure 155.7 · Screen recorded 24 September 2026

8 Move between plans in the **Plans** section.

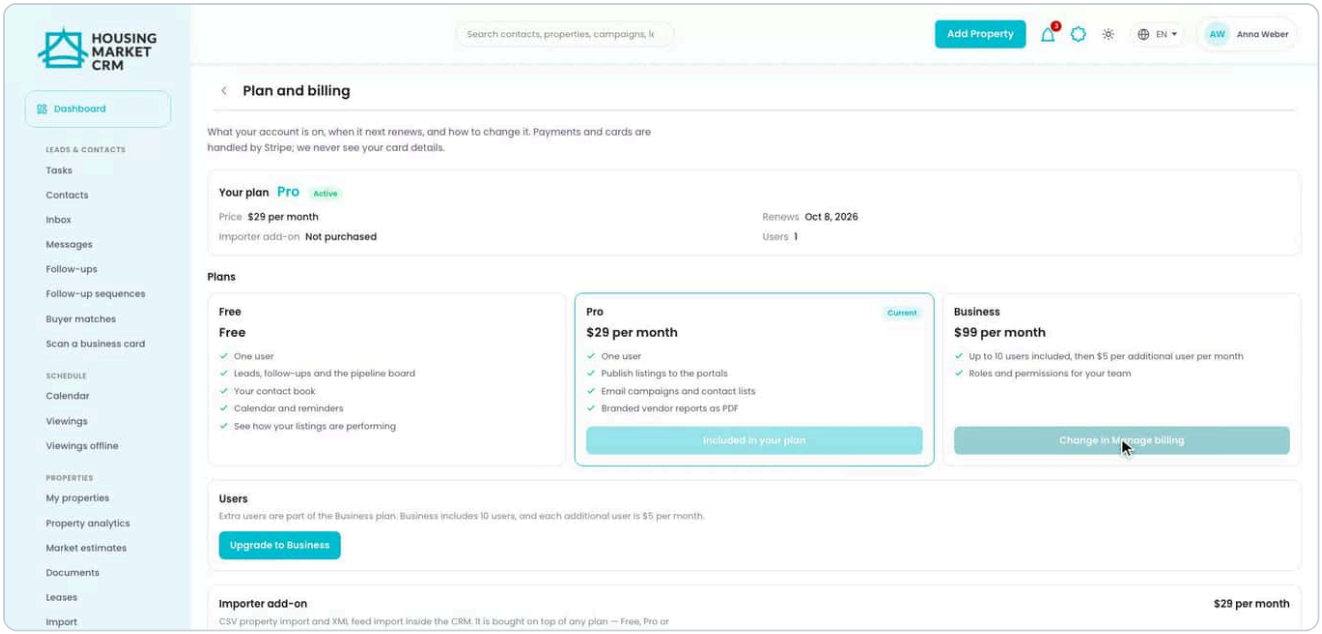


Figure 155.8 · Screen recorded 24 September 2026

156 CHAPTER 156

Refer an agent

All plans | For agents | Watch the video

OVERVIEW

Share your referral link from Refer an agent. When an agent who signed up through it becomes a paying Pro or Business customer of Housing Market CRM, you and they each get 50 USD of Housing Market Ads credit.

Choose Refer an agent in the left menu. The page gives you your own referral link; choose Copy link and send it to an agent you know.

When the credit is earned

An agent who creates their Housing Market CRM account through your link is recorded as referred by you. When they become a paying Pro or Business customer of Housing Market CRM, with their first paid Pro or Business plan invoice, you each get 50 USD of Housing Market Ads credit. The amount is shown on the Refer an agent page. Listing boosts and add-ons on their own (AI Autopilot, Developer Launch, the Importer, unit packs) do not count, and neither does an invoice for nothing, such as a free trial. Only the first paid Pro or Business plan invoice ever qualifies; an add-on bought before it does not use up the referral.

It is credit in Housing Market Ads, to spend on Ads campaigns. It is not paid out as money and it does not reduce your CRM bill.

Who counts

- Self-referrals are not eligible: an account with the same sign-in email as yours, or paying with the same payment account as yours, earns nothing.
- Each account can be referred once.
- The link works when the agent creates their account through it.

Following your referrals

The page totals how many agents signed up with your link, how many have paid, the credit you have earned and the credit on hold. Below that, each referral shows its status — Signed up, not paid yet; Paid; or Not eligible — and what has happened to your credit for it: Not due yet, On hold, or Added to Housing Market Ads.

Credit is added to a Housing Market Ads account. If you do not have one yet, or have not added a card in Housing Market Ads, your credit is held rather than lost, and the page says which of the two is missing; it is added once that is done. The agent you referred sees the same: a note that their credit has been added, or that it is waiting for them.

From the Help Center: **How does the referral programme work?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

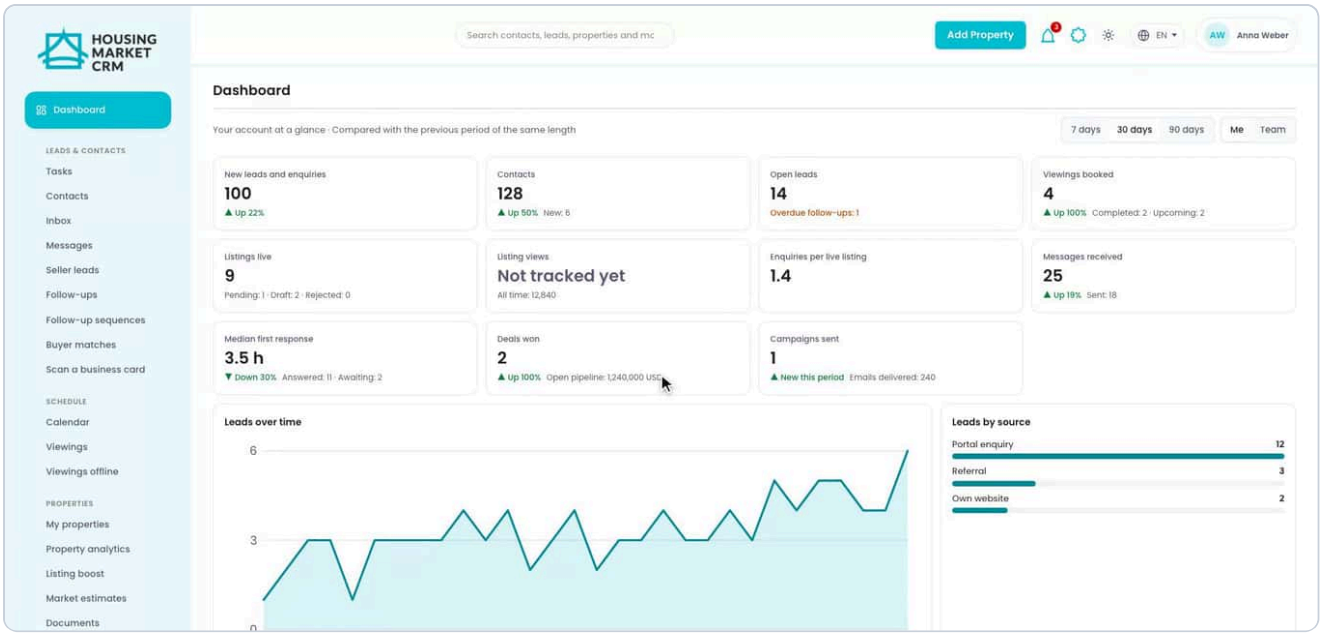


Figure 156.1 · Screen recorded 16 October 2026

2 Click **Refer an agent** in the left menu.

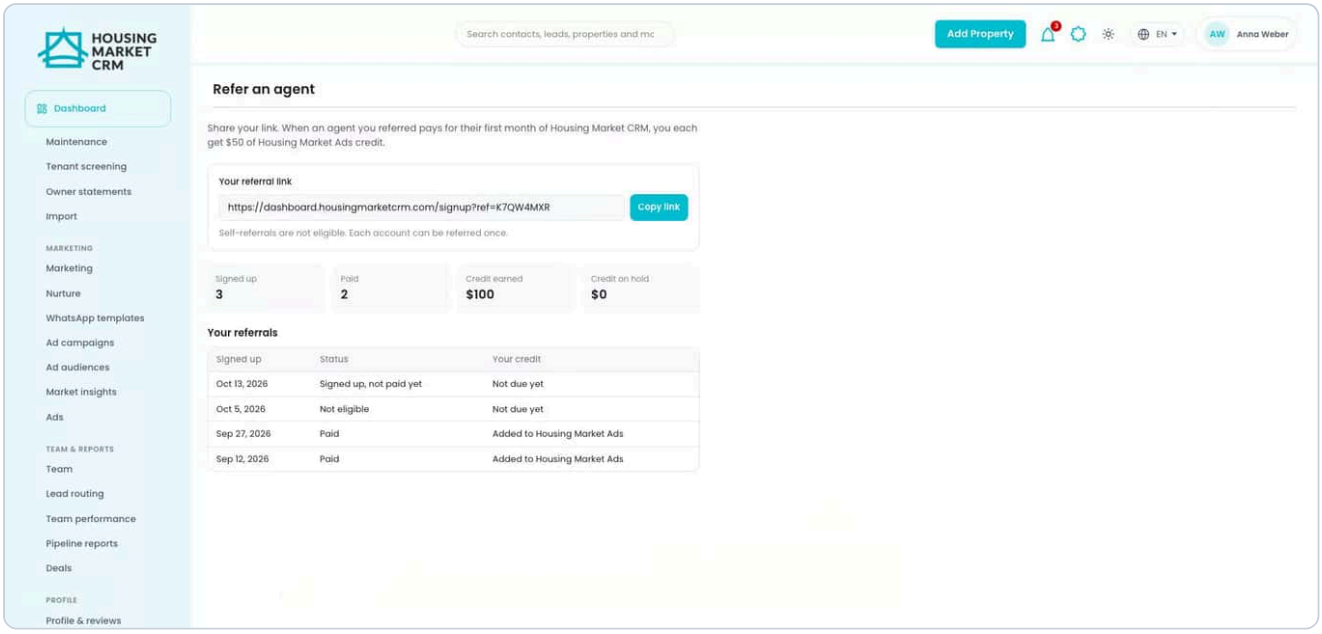


Figure 156.2 · Screen recorded 16 October 2026

3 When an agent you referred **pays their first month** you **each** get **$50** of Housing Market Ads credit.

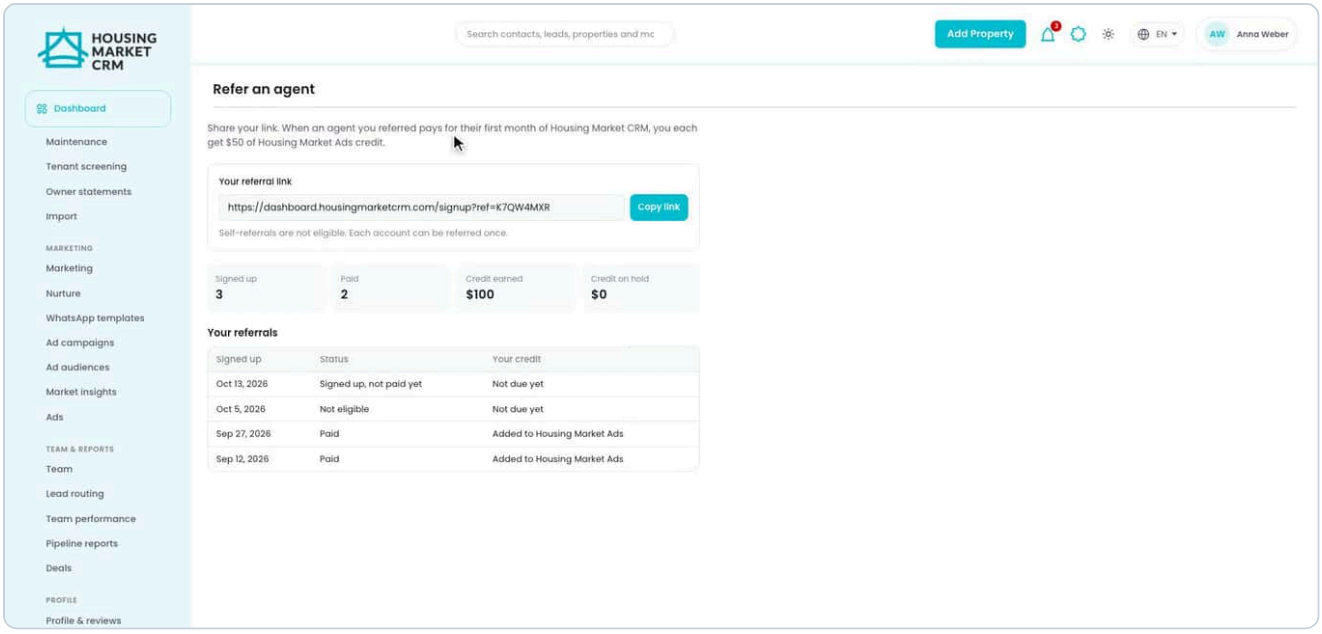


Figure 156.3 · Screen recorded 16 October 2026

4 This is **your referral link.**

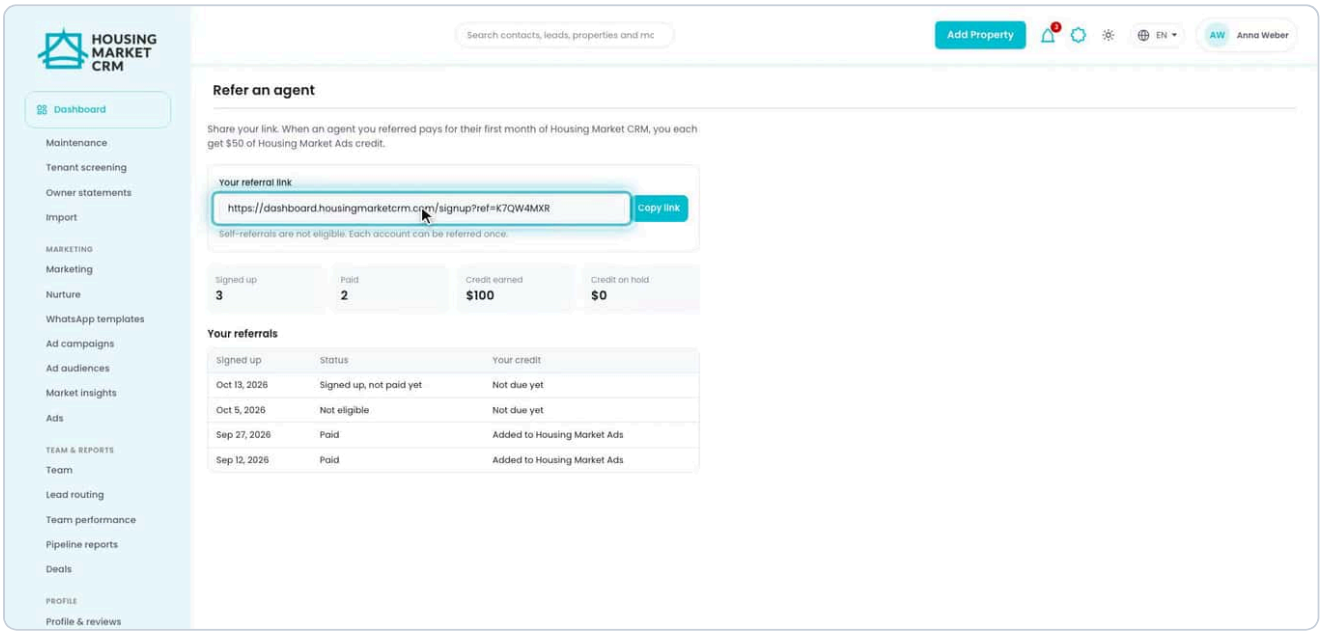


Figure 156.4 · Screen recorded 16 October 2026

5 Click **Copy link** and send it to an agent you know.

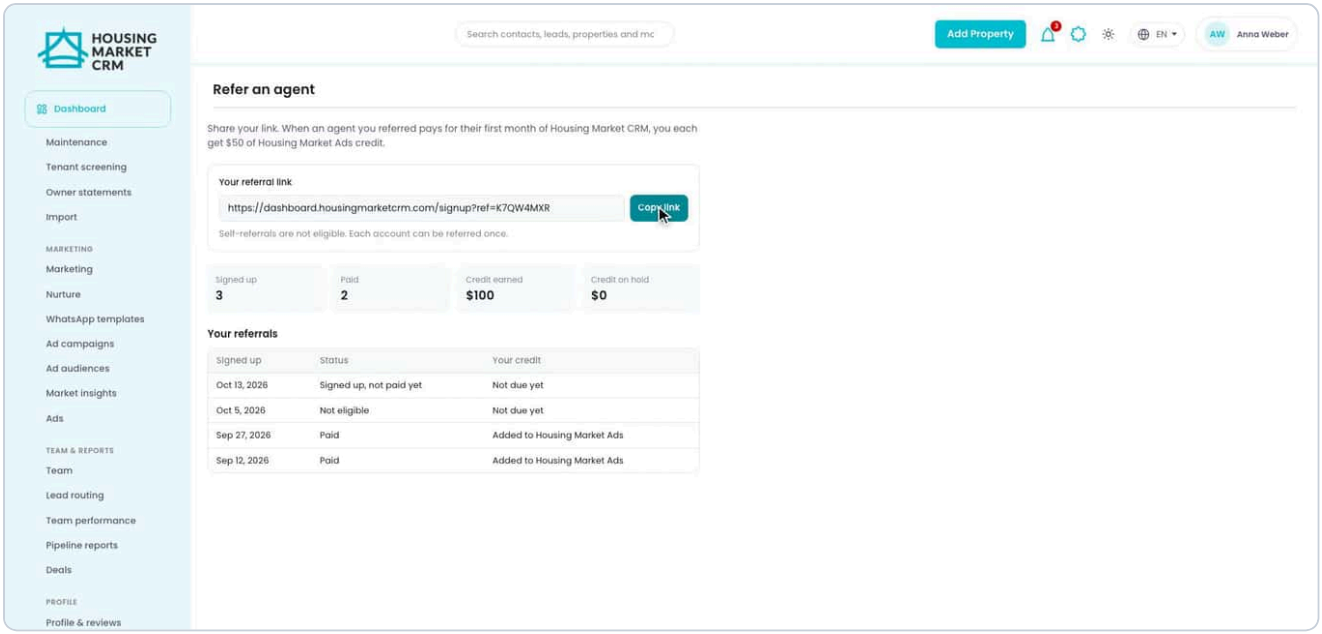


Figure 156.5 · Screen recorded 16 October 2026

6 Self-referrals do not count. Each account can be referred **once**.

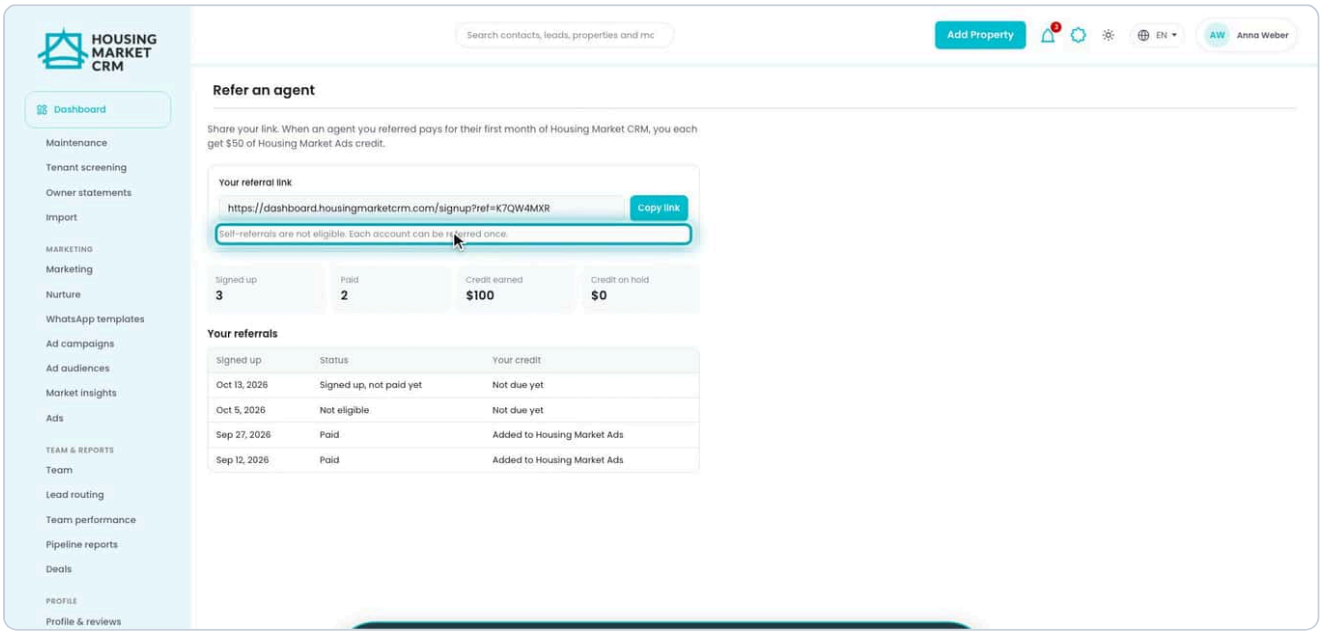


Figure 156.6 · Screen recorded 16 October 2026

7 Signed up, paid, credit earned and credit on hold.

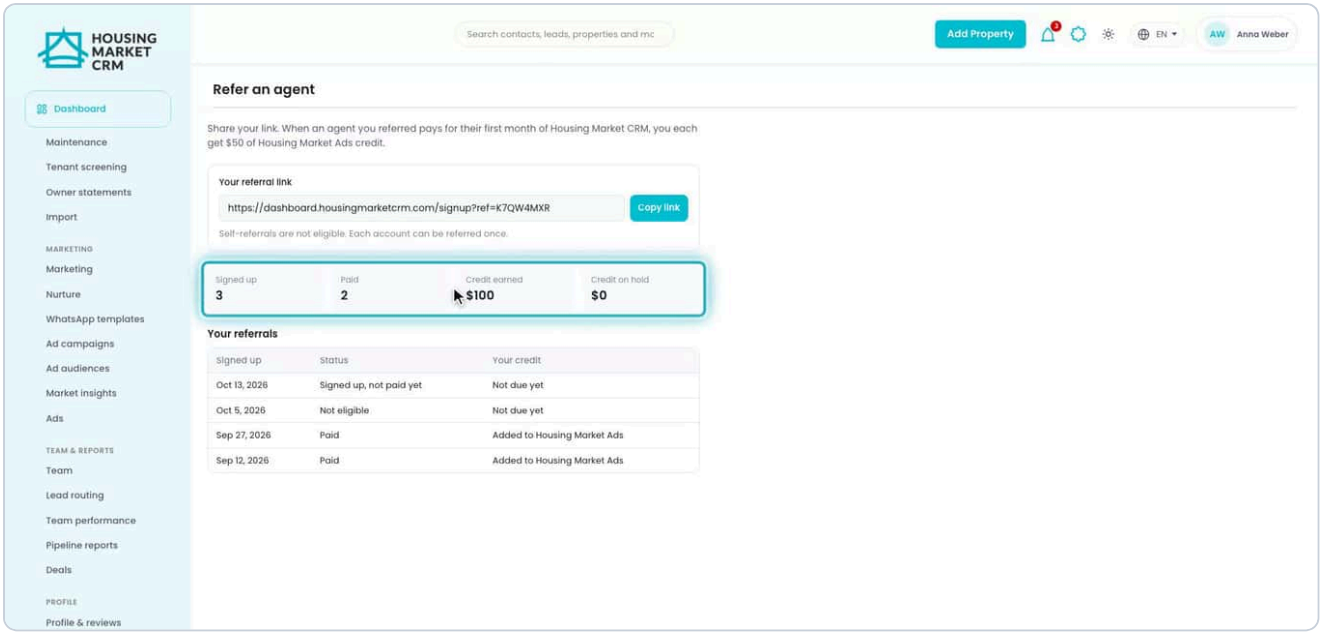


Figure 156.7 · Screen recorded 16 October 2026

8 Every agent who signed up with your link.

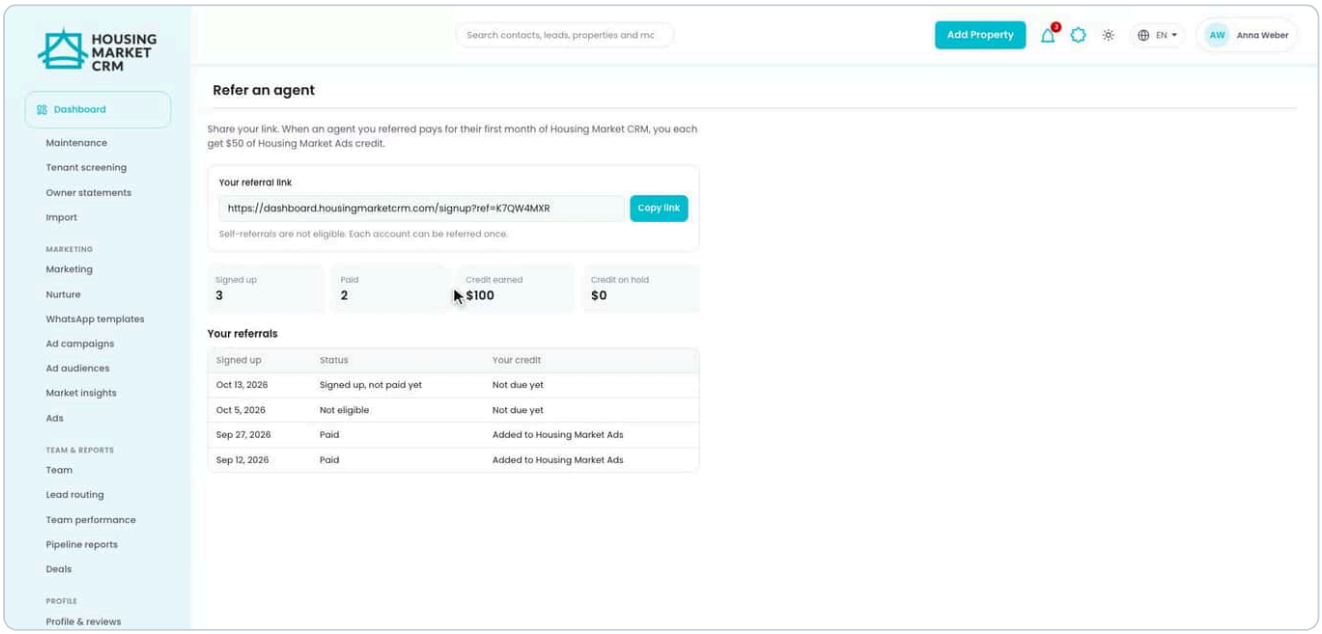


Figure 156.8 · Screen recorded 16 October 2026

9 Once they pay, the credit is **added to Housing Market Ads**.

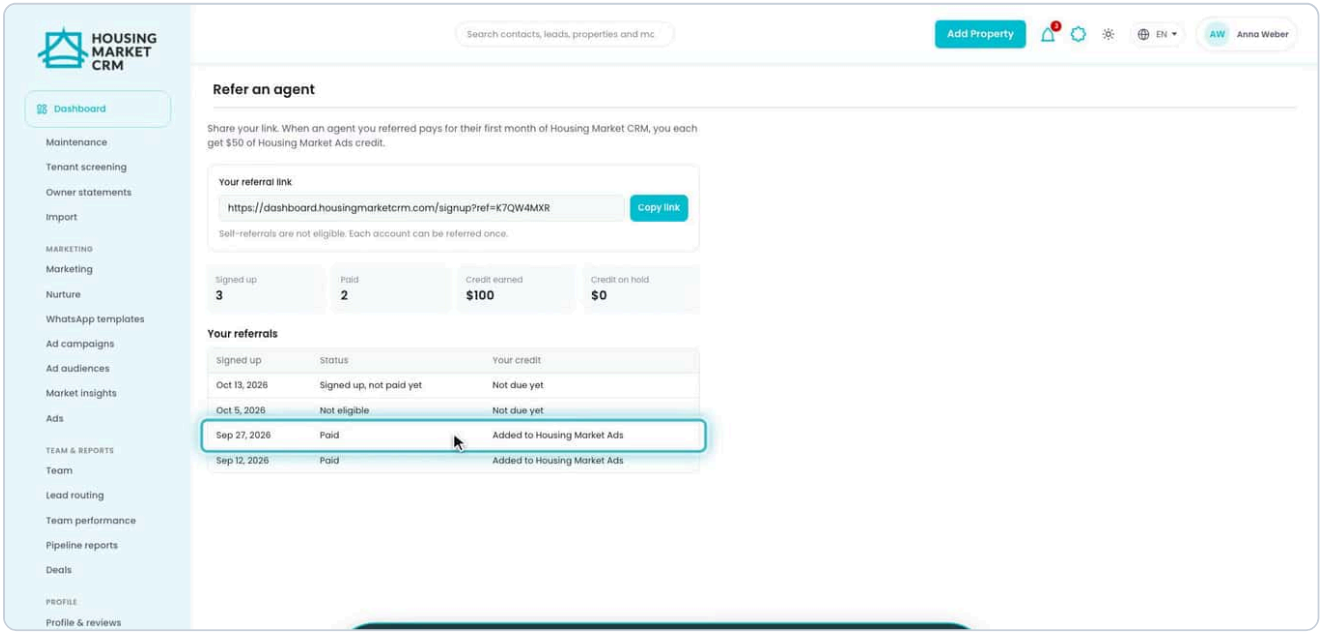


Figure 156.9 · Screen recorded 16 October 2026

10 Signed up but not paid yet: **not due** until they pay.

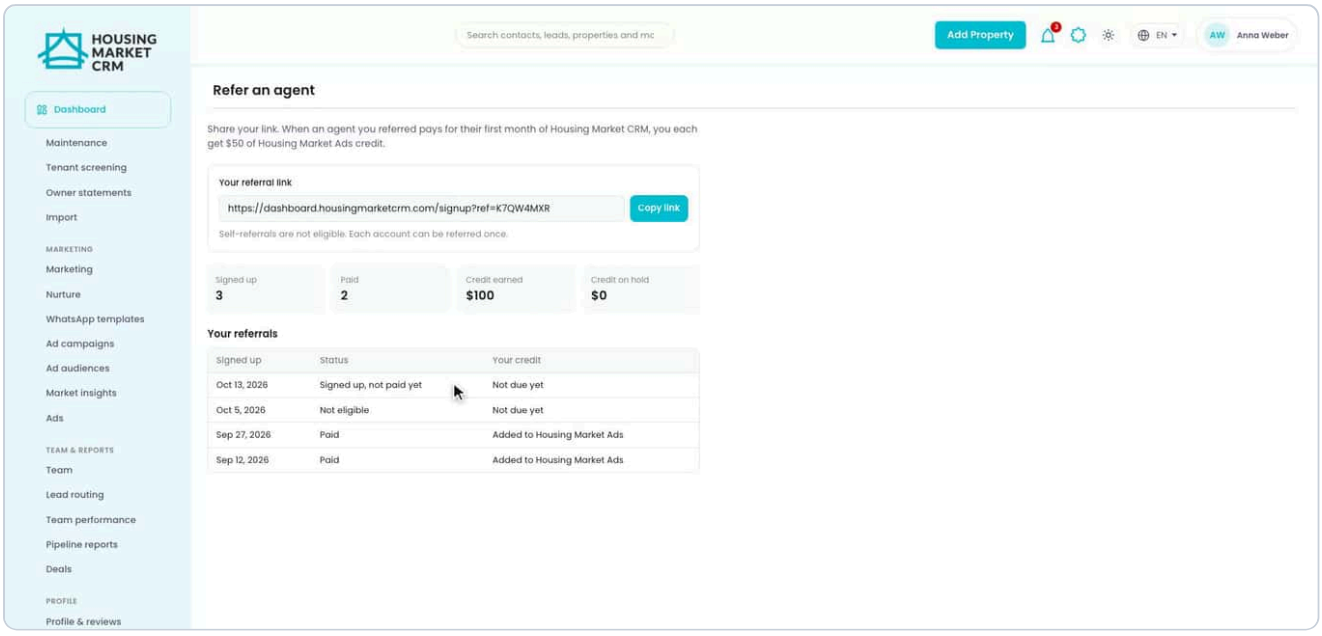


Figure 156.10 · Screen recorded 16 October 2026

RELATED HELP CENTER ARTICLES

Does the CRM work with Housing Market Ads?	faq.housingmarketgroup.com/faq/does-the-crm-work-with-housing-market-ads

157 CHAPTER 157

Download invoices

All plans | For admins | Watch the video

OVERVIEW

Billing is a link to the billing page of your Housing Market account. It is in the account menu, in Settings and on the Plan and billing screen, and it opens in the same tab.

Billing appears in three places: in the account menu, in Settings and on the Plan and billing screen beside Manage billing. Choose it and the CRM takes you, in the same tab and signed in as you, to the billing page of your Housing Market account.

It is an addition. Plan and billing, Manage billing and everything you used before are where they were. See "How do I upgrade, add users or cancel?" for the steps there.

If the billing page cannot be opened, the CRM shows "This part is being updated." and you stay where you are. Nothing is changed, charged or cancelled by that.

From the Help Center: **What is the Billing link in the CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

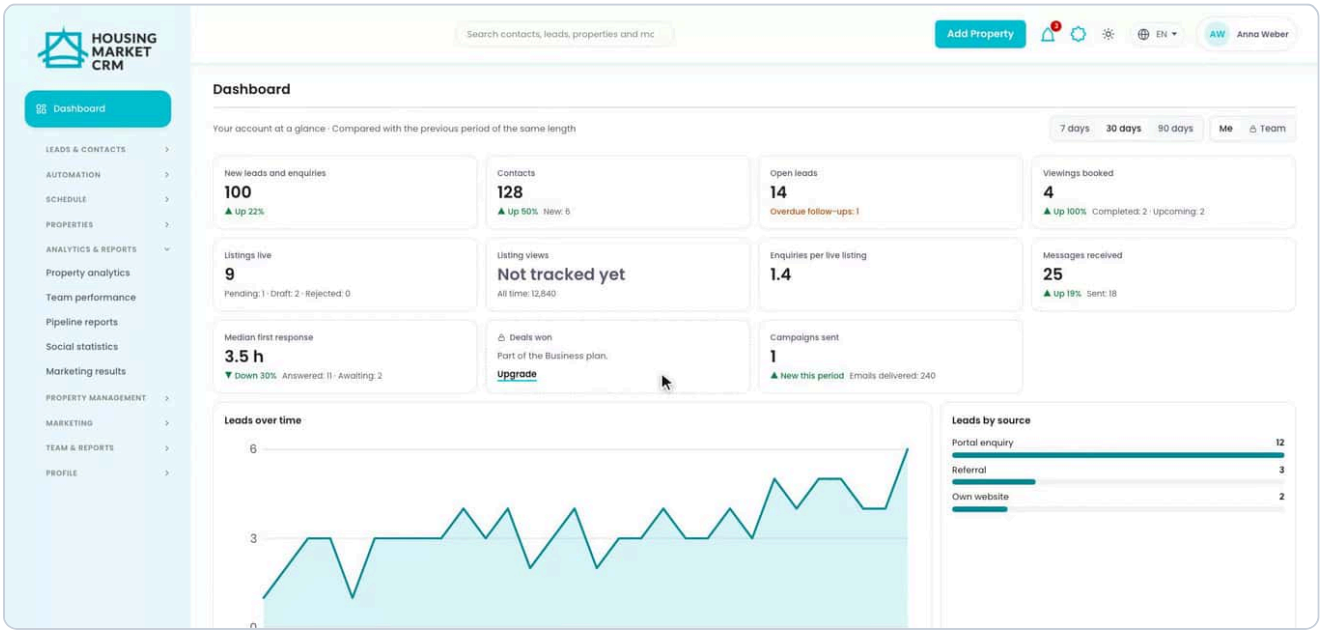


Figure 157.1 · Screen recorded 1 November 2026

2 Click the **Settings** icon at the top.

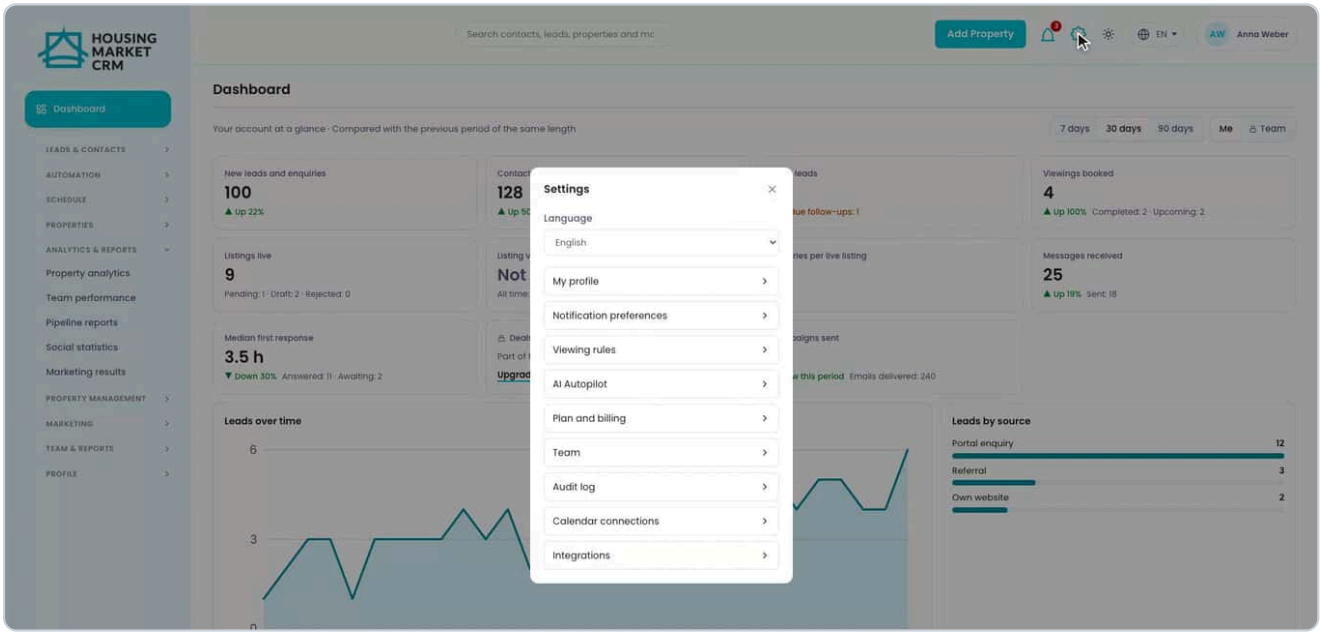


Figure 157.2 · Screen recorded 1 November 2026

3 Choose **Plan and billing**.

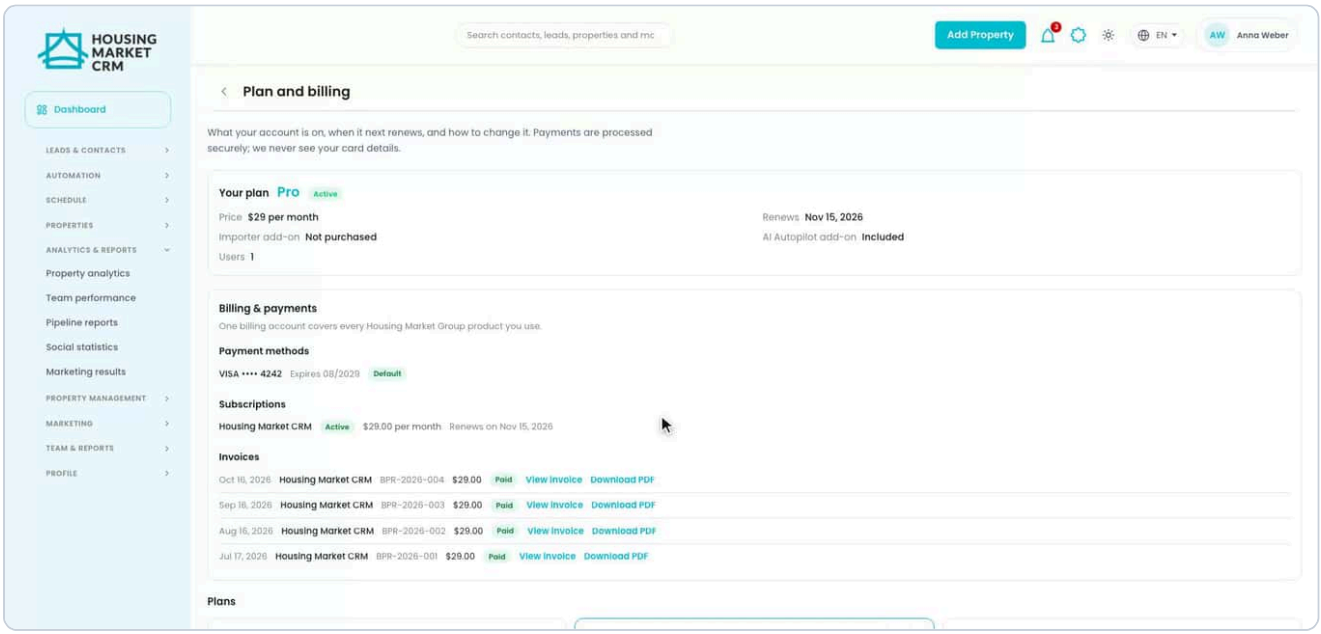


Figure 157.3 · Screen recorded 1 November 2026

4 Scroll to **Billing & payments**.

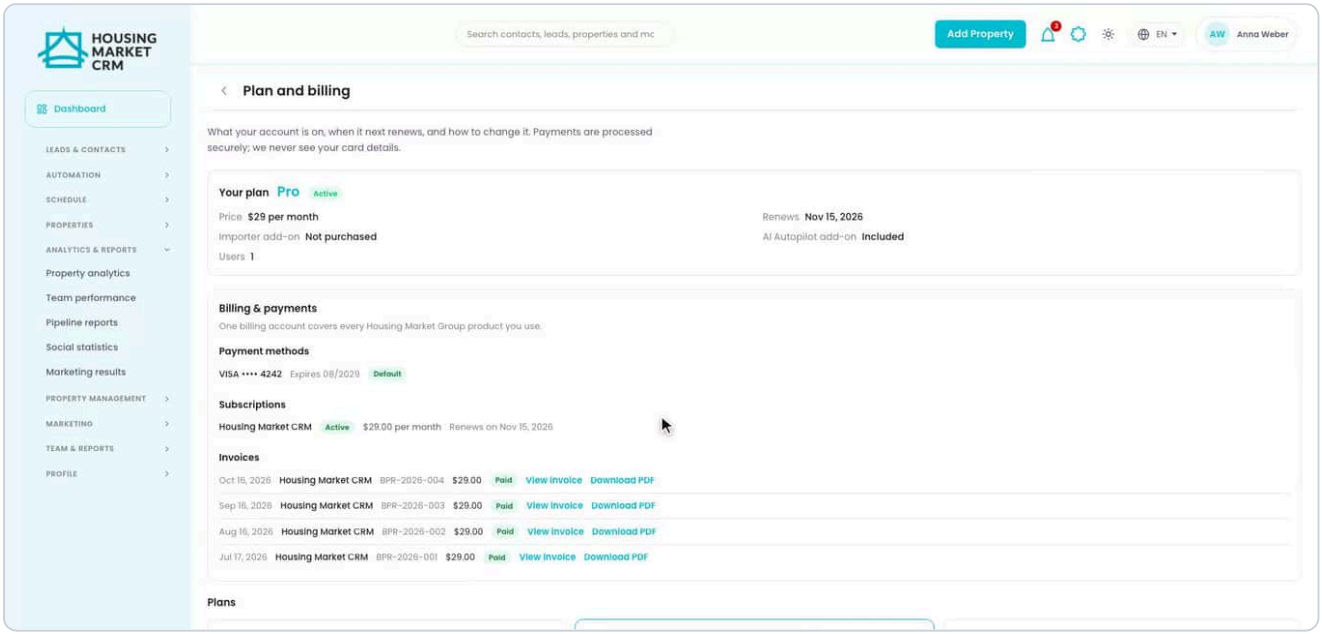


Figure 157.4 · Screen recorded 1 November 2026

5 One billing account covers every **Housing Market Group** product you use.

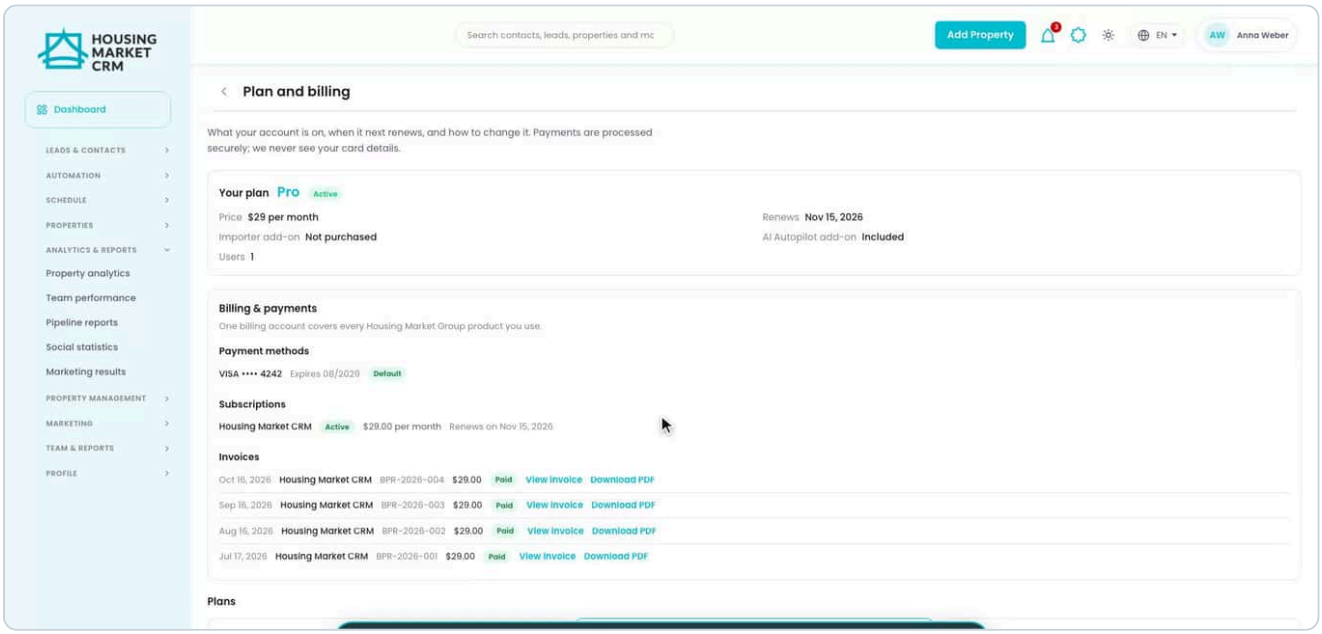


Figure 157.5 · Screen recorded 1 November 2026

6 Your saved **payment method** and your **subscriptions**, with the renewal date.

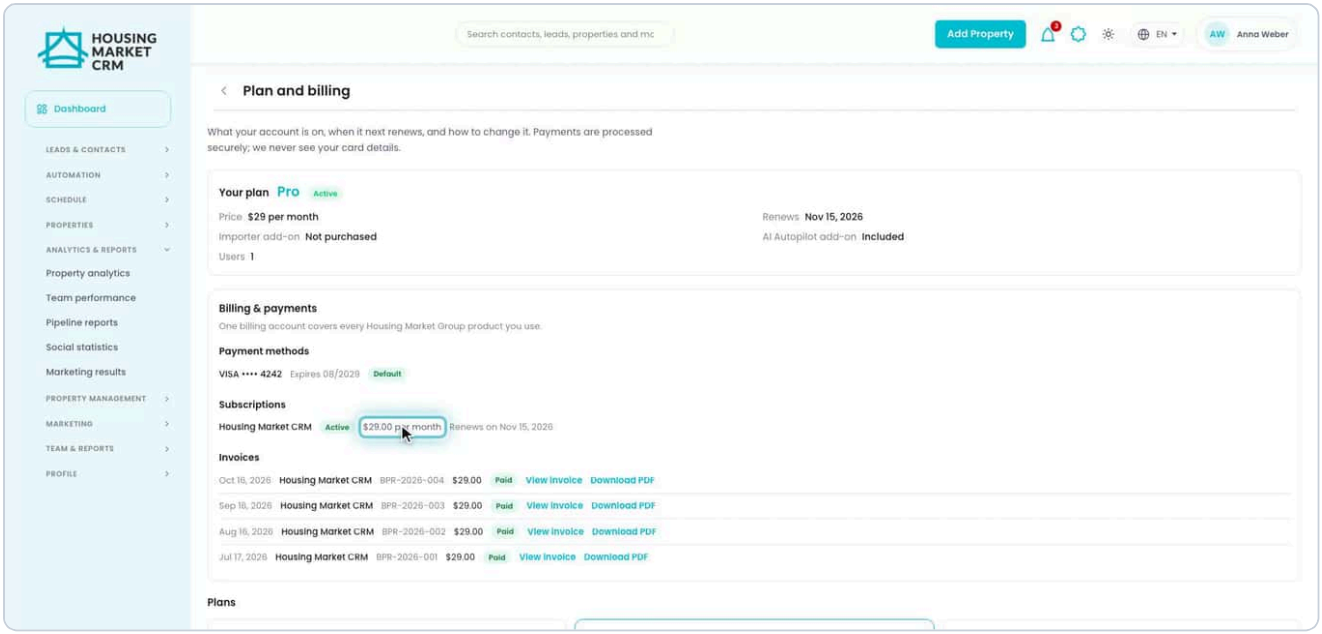


Figure 157.6 · Screen recorded 1 November 2026

7 Below them is the list of **invoices**, newest first.

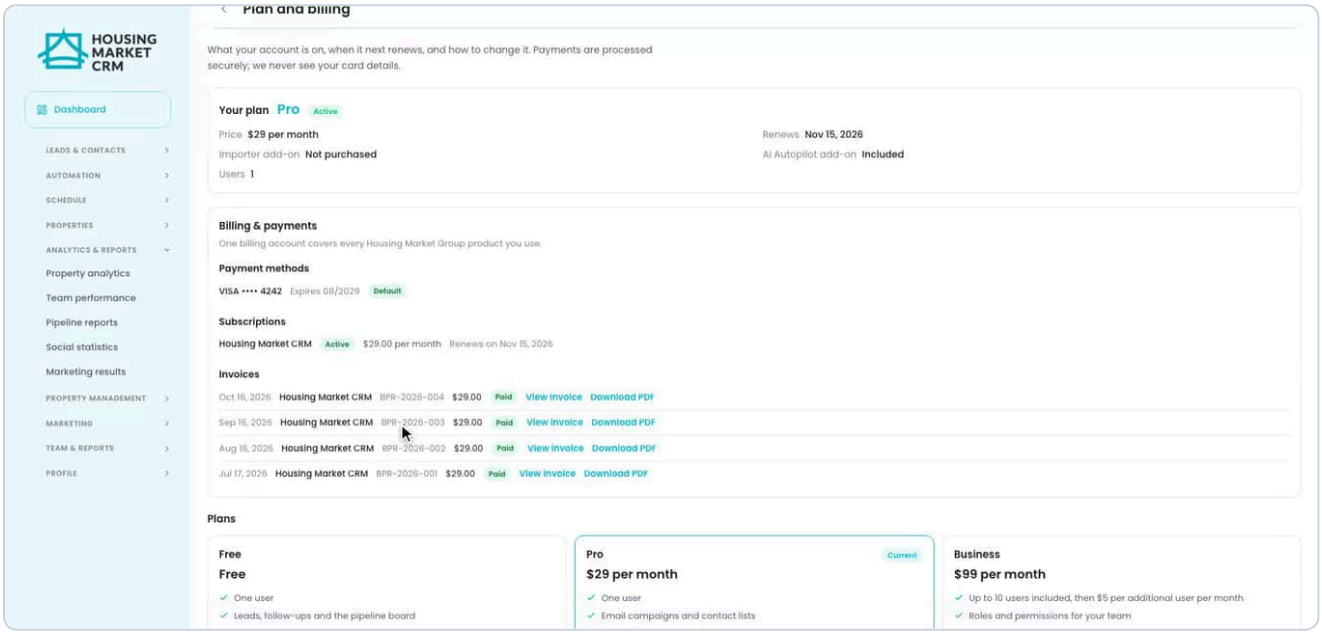


Figure 157.7 · Screen recorded 1 November 2026

8 Each shows its **date**, **number**, **amount** and **status**.

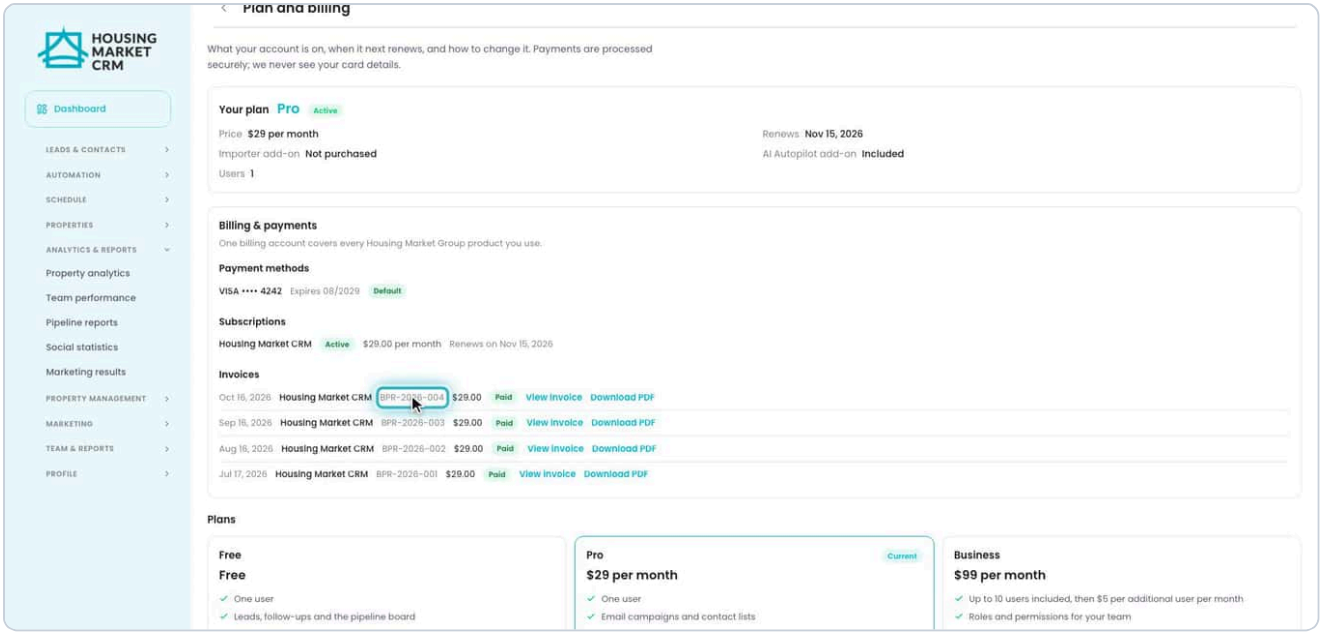


Figure 157.8 · Screen recorded 1 November 2026

9 **View invoice** opens it on a secure billing page.

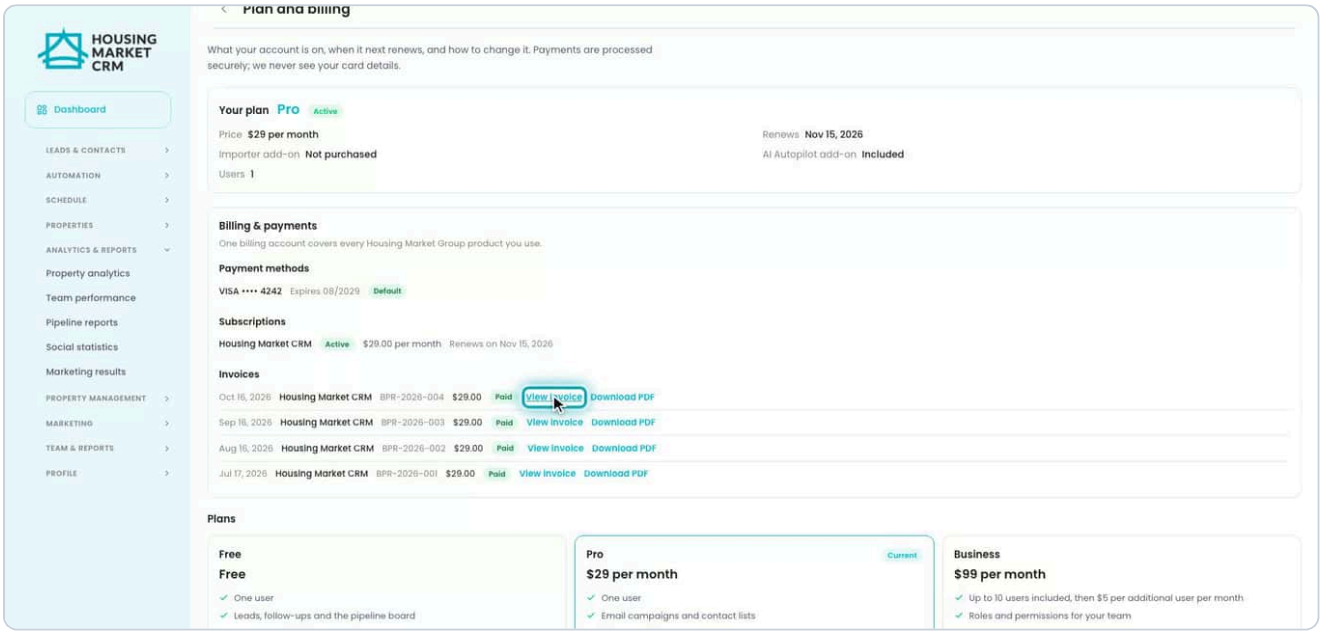


Figure 157.9 · Screen recorded 1 November 2026

10 Click **Download PDF** to save the invoice for your accounts.

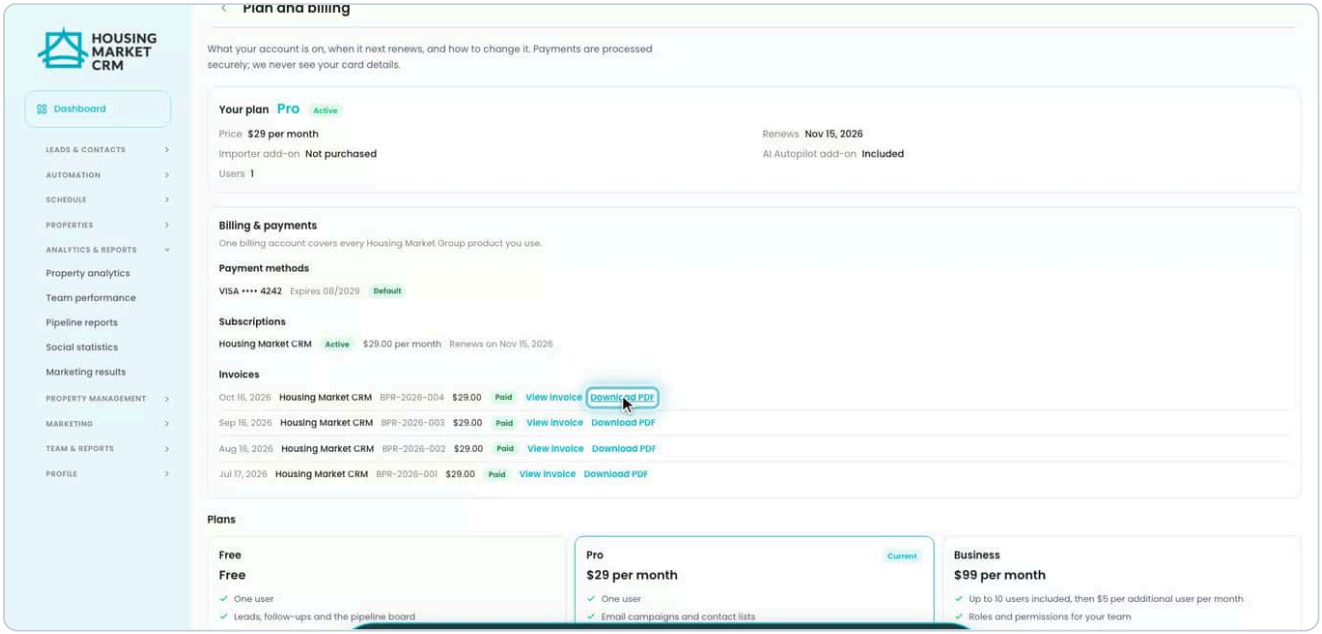


Figure 157.10 · Screen recorded 1 November 2026

11 Every earlier invoice has its own **Download PDF** link.

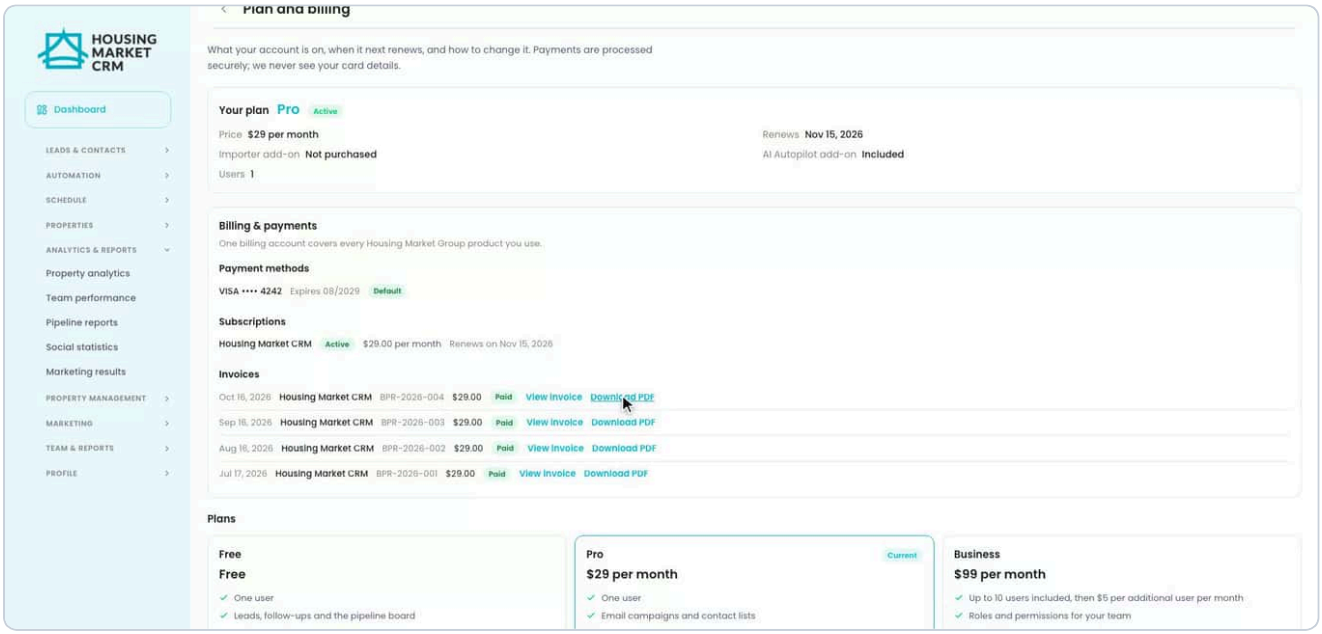


Figure 157.11 · Screen recorded 1 November 2026

12 To change the card that pays them, use **Manage billing**.

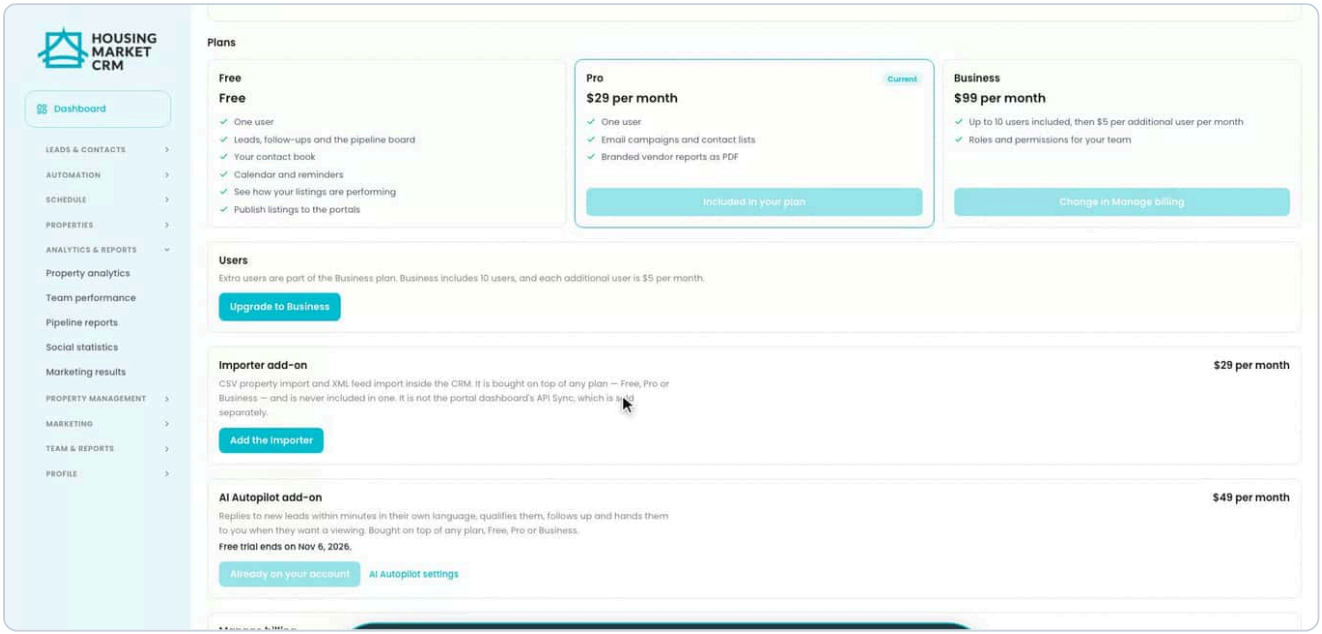


Figure 157.12 · Screen recorded 1 November 2026

RELATED HELP CENTER ARTICLES

How do I upgrade, add users or cancel?	faq.housingmarketgroup.com/faq/how-do-i-upgrade-add-users-or-cancel

PART 13

Website widgets

158 Create a website widget

159 Add a widget to your website

160 Limit a widget to your own website

161 Show or hide a property on your website

162 Website widget statistics

163 Retarget your website visitors with Ads

164 Promote a property with Ads from your widgets

165 Widget enquiries become leads in the CRM

166 Import your listings from your website

158 CHAPTER 158

Create a website widget

Pro and Business | For agents who want their properties on their own website | Watch the video

OVERVIEW

A snippet you copy from Housing Market CRM and paste into your own website to show your listings, a search bar, an enquiry form or your agent card.

The Housing Market Website Widget puts your Housing Market CRM listings on a website you own, without rebuilding the website. You copy a short snippet of code from the CRM and paste it into a page. It works on Wix, Squarespace, Webflow, Shopify, WordPress and websites that you or a developer built yourselves.

You set everything up in the CRM. In the properties area, open Website Widgets, create a widget, choose its type, colours and layout and which properties it shows, then copy the snippet it gives you. When you change the widget later, the website follows. You do not paste the code again.

Enquiries from the widget arrive in the CRM as leads, and the views and enquiries of each widget are in Property Analytics. You need a Housing Market CRM account, which is free to start. Some widget features need the Pro or Business plan.

From the Help Center: **What is the Housing Market Website Widget?**

Six: a listings grid, a search bar, a featured strip, a property card, an enquiry form and an agent card.

- Listings grid: your properties as a grid on any page.
- Search bar: lets a visitor choose what they want and either filters a grid on the same page or sends them to your listings page with their choices applied.
- Featured strip: a carousel of the properties you want to stand out (Pro and above).
- Property card: one property in full.
- Enquiry form: sends each enquiry to your CRM as a lead.
- Agent card: a card with your details as an agent.

In Website Widgets you choose the colours, the layout and the font. By default the widget uses your website's own font. A property opens in a window over the page, which has a link you can share and which the browser's Back button closes, or on the Housing Market portal, as you choose.

A widget shows the properties you have switched on for your website. In My Properties, open a property and tick Show on my website under On your website. Properties that are published on a portal show automatically. The address stays hidden and the map pin rounded, unless you choose to show the exact location.

From the Help Center: **Which widgets can I show on my website?**

STEP BY STEP

1 This is your **Housing Market CRM** dashboard.

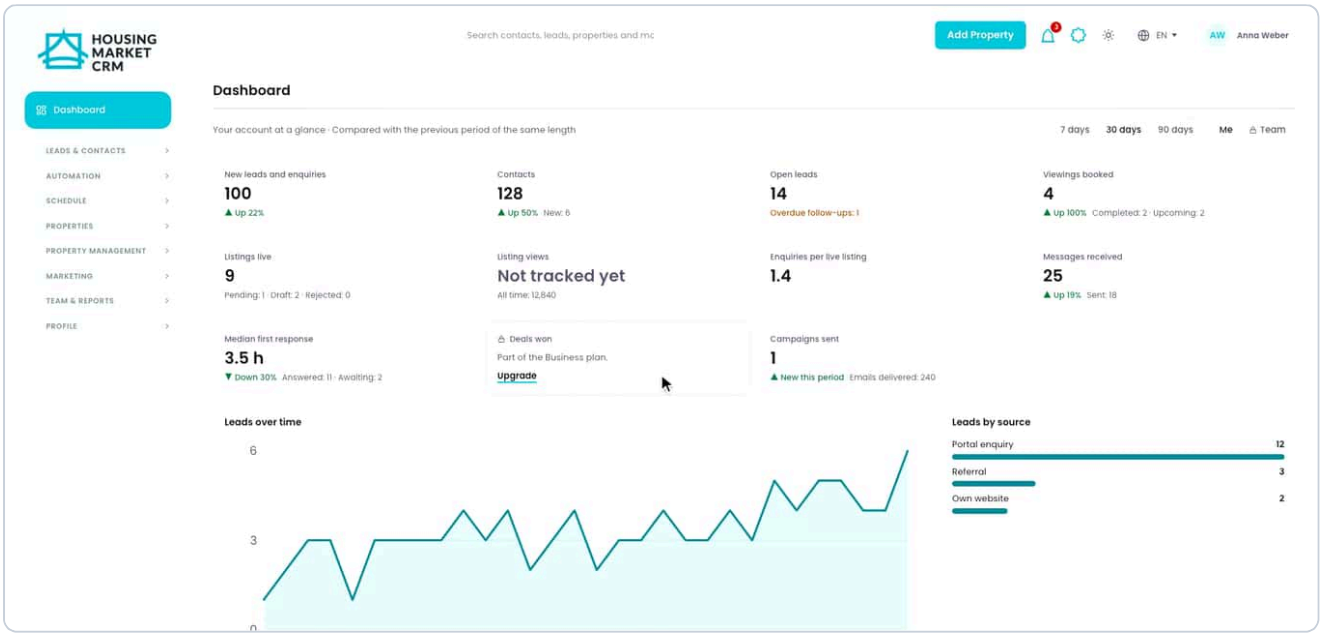


Figure 158.1 · Screen recorded 24 October 2026

2 Open **Properties** in the left menu.

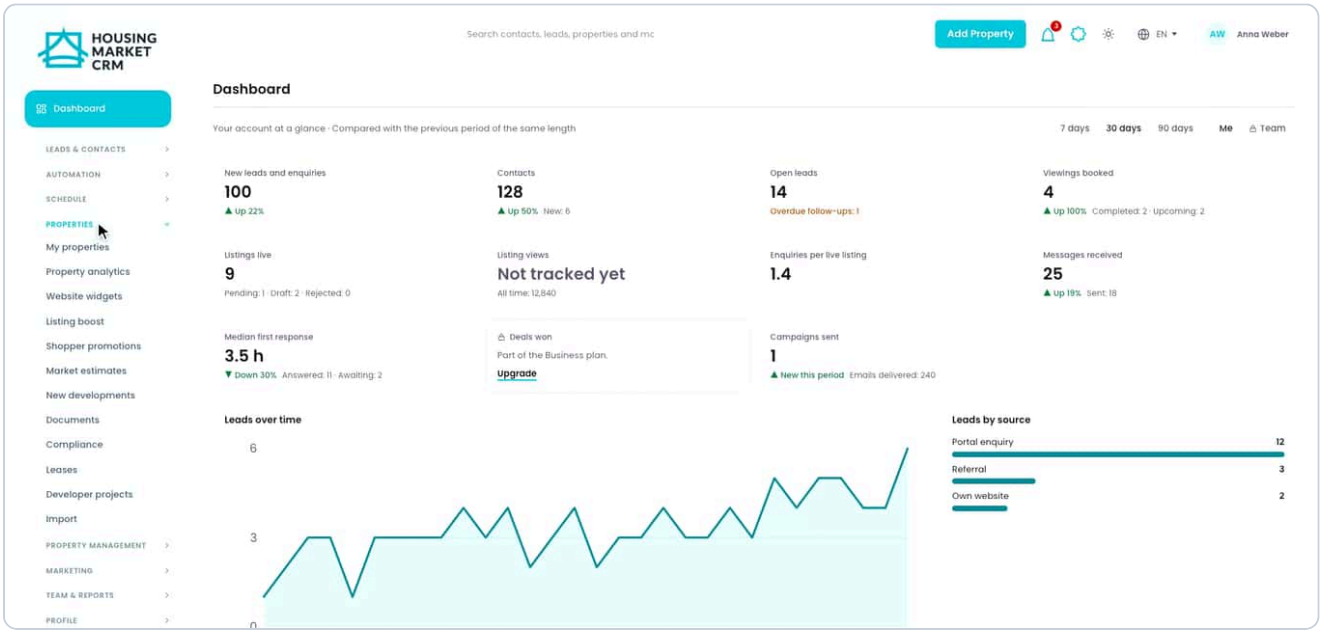


Figure 158.2 · Screen recorded 24 October 2026

3 Click **Website widgets**.

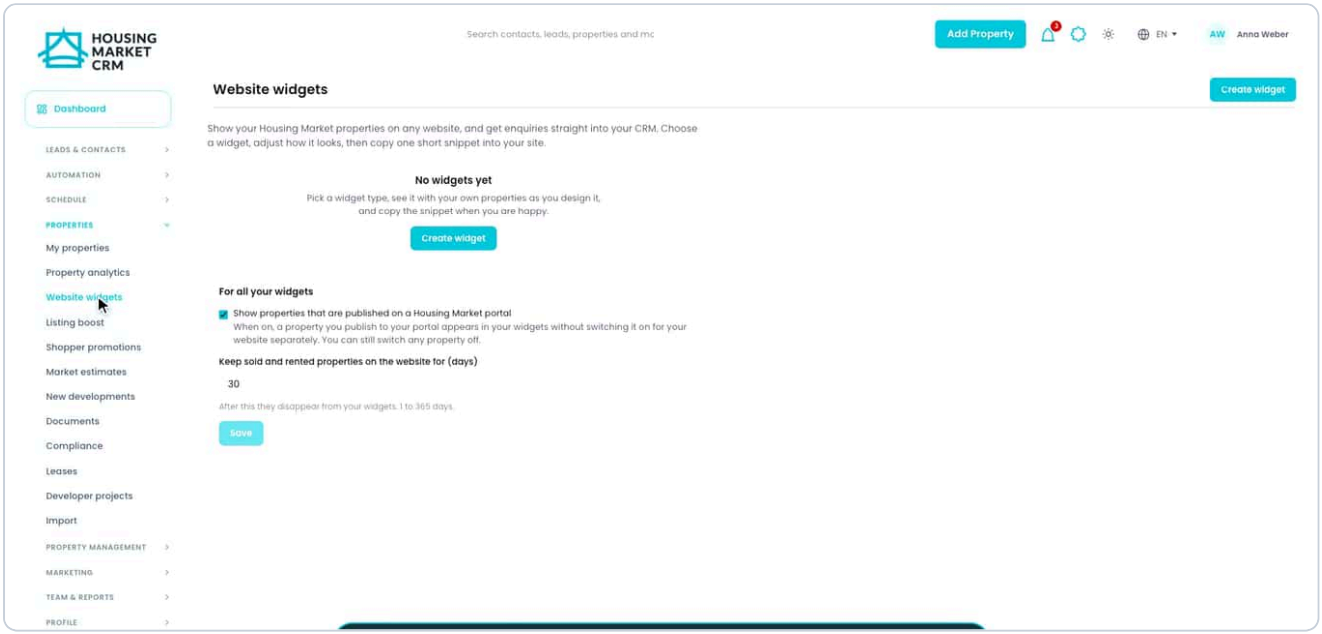


Figure 158.3 · Screen recorded 24 October 2026

4 Show your properties on **any website**, and get the enquiries in your CRM.

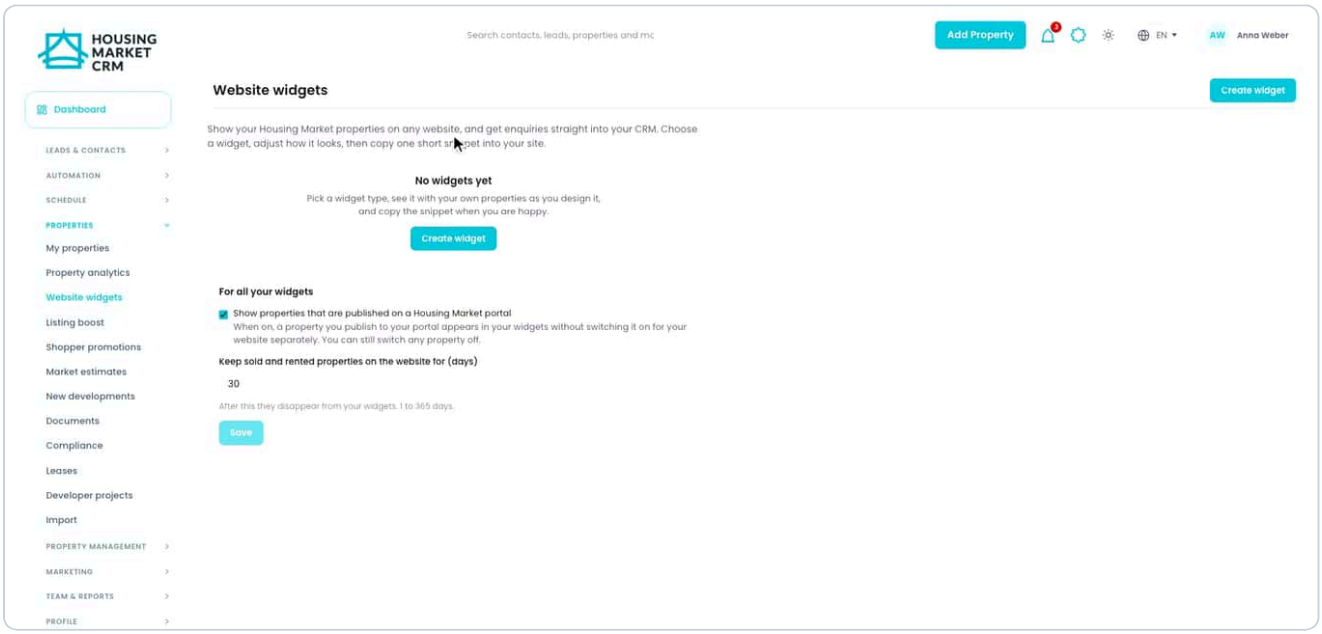


Figure 158.4 · Screen recorded 24 October 2026

5 Click **Create widget**.

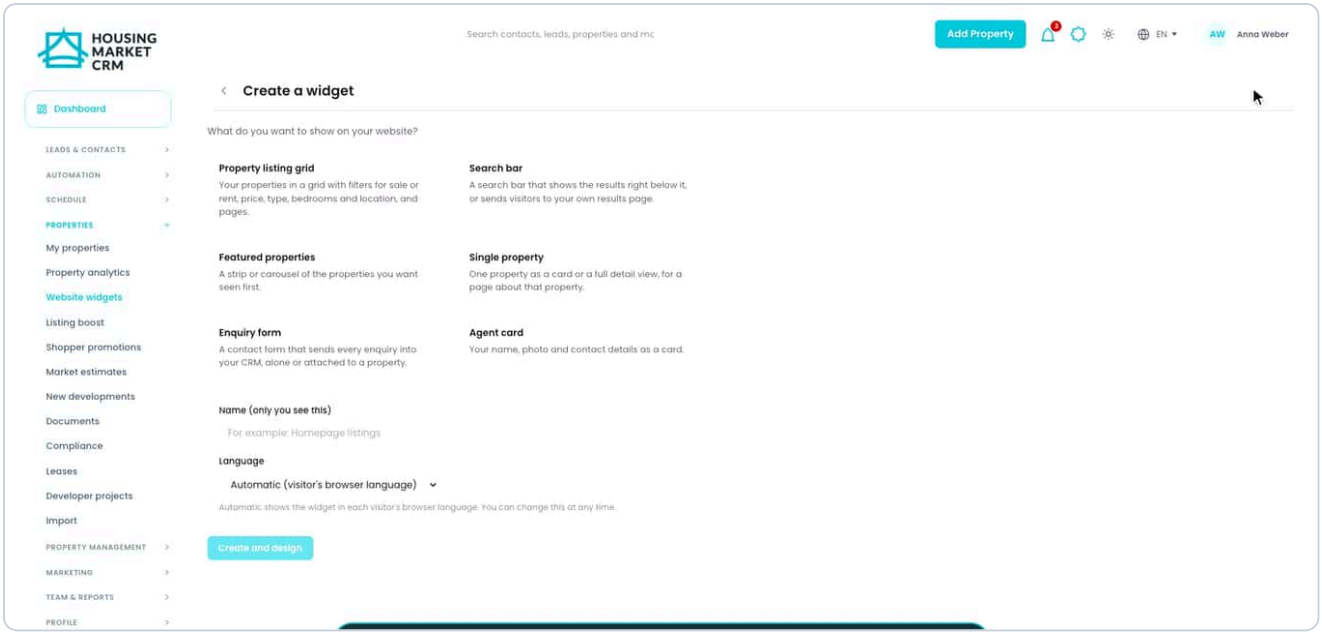


Figure 158.5 · Screen recorded 24 October 2026

6 Choose what to show: a **property grid**, a **search bar**, **featured properties**, a **single property**, an **enquiry form** or an **agent card**.

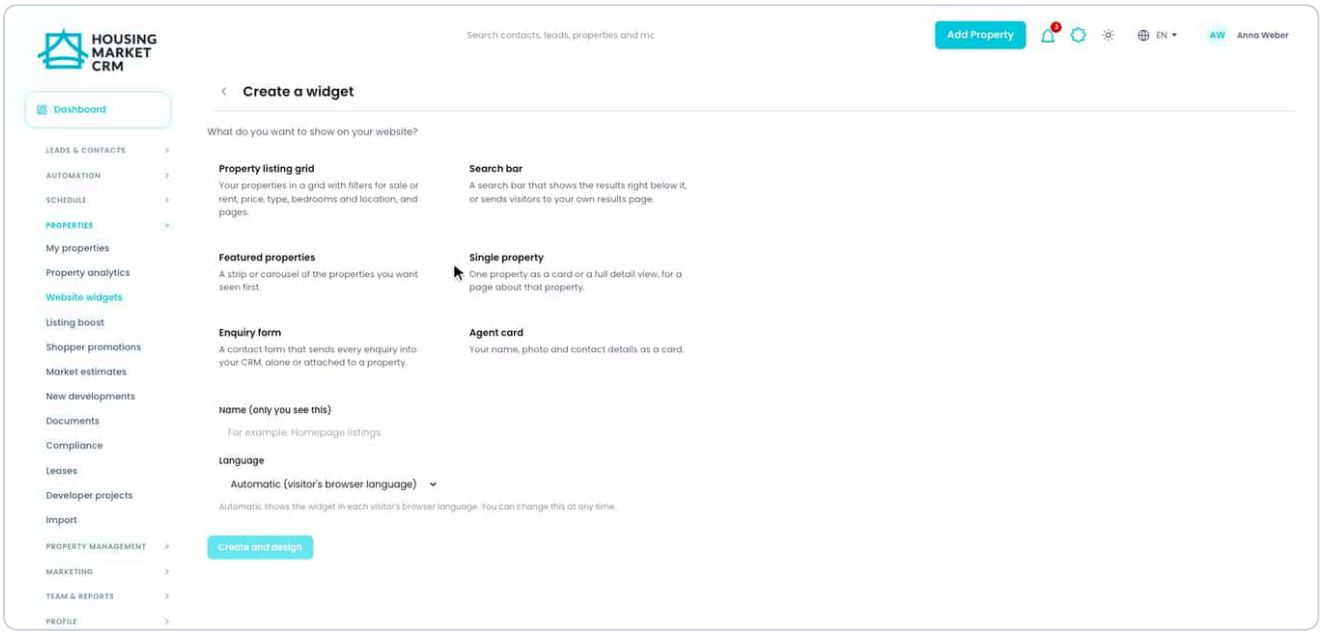


Figure 158.6 · Screen recorded 24 October 2026

7 We will make a **Property listing grid**.

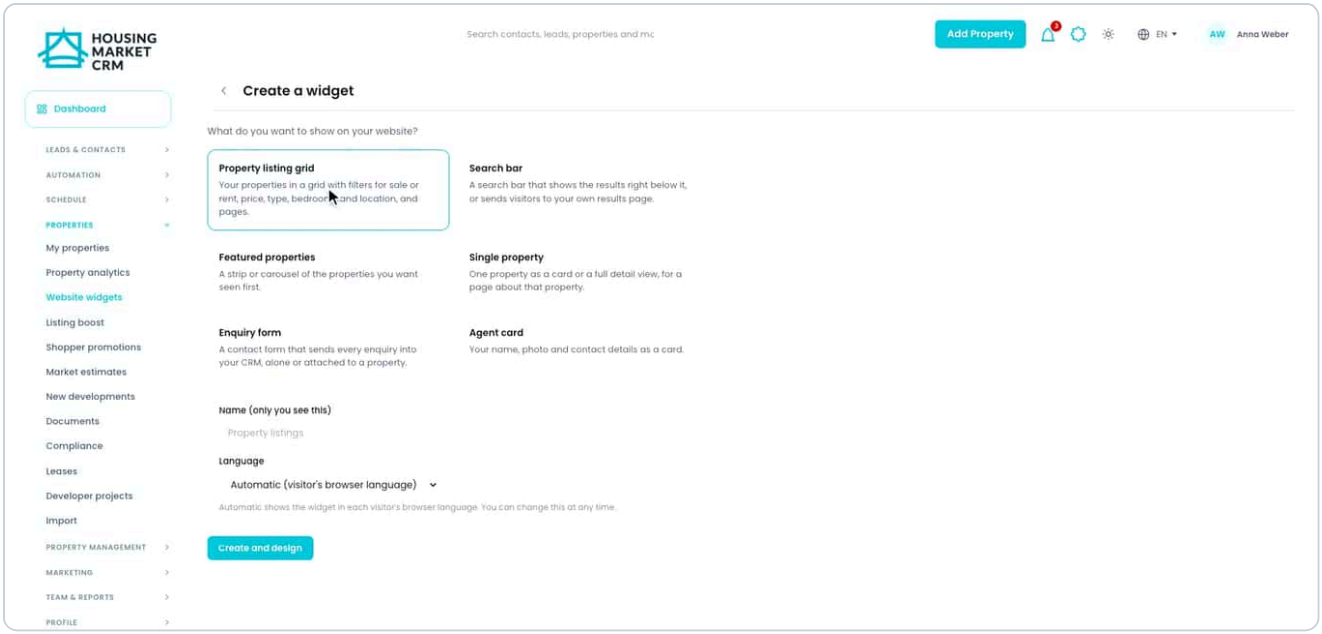


Figure 158.7 · Screen recorded 24 October 2026

8 Give it a **name**. Only you see it.

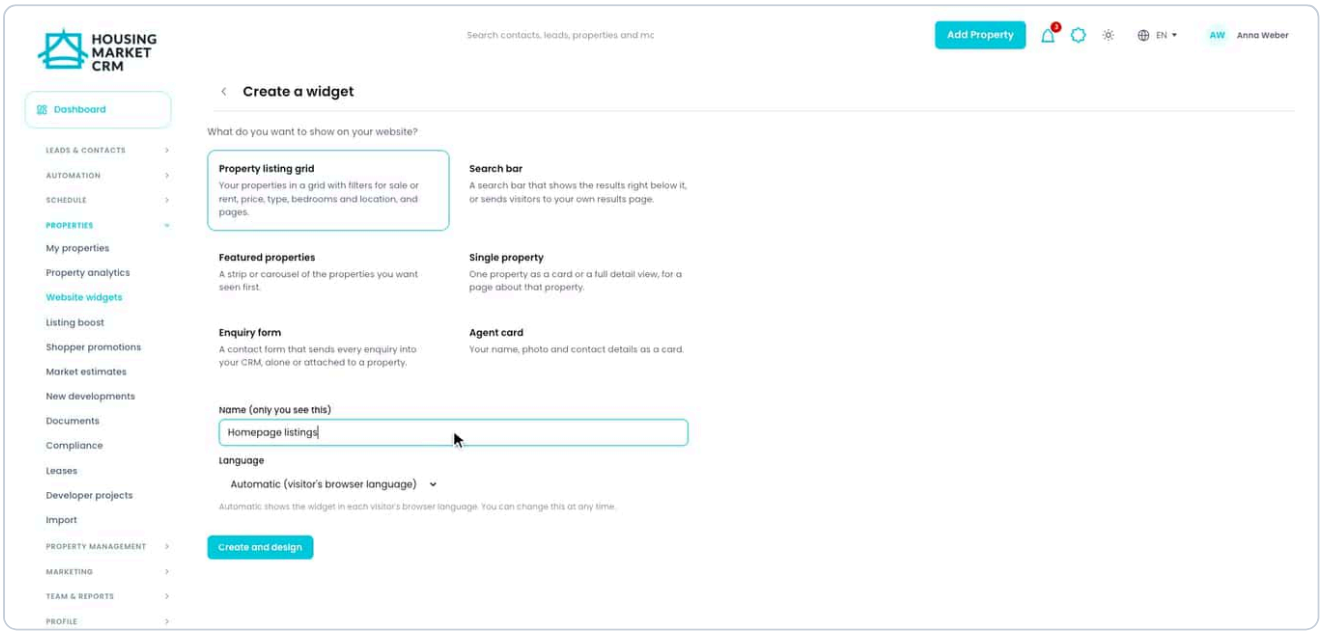


Figure 158.8 · Screen recorded 24 October 2026

9 Click **Create and design**.

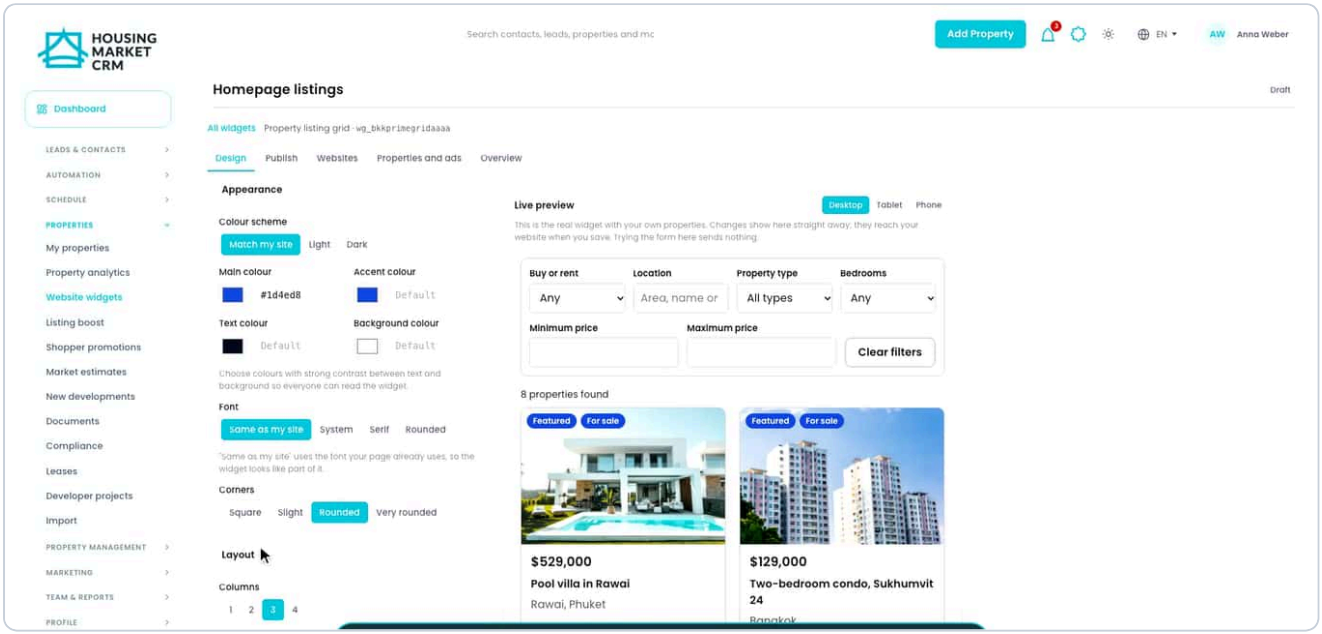


Figure 158.9 · Screen recorded 24 October 2026

10 The **live preview** shows the real widget with **your own properties**.

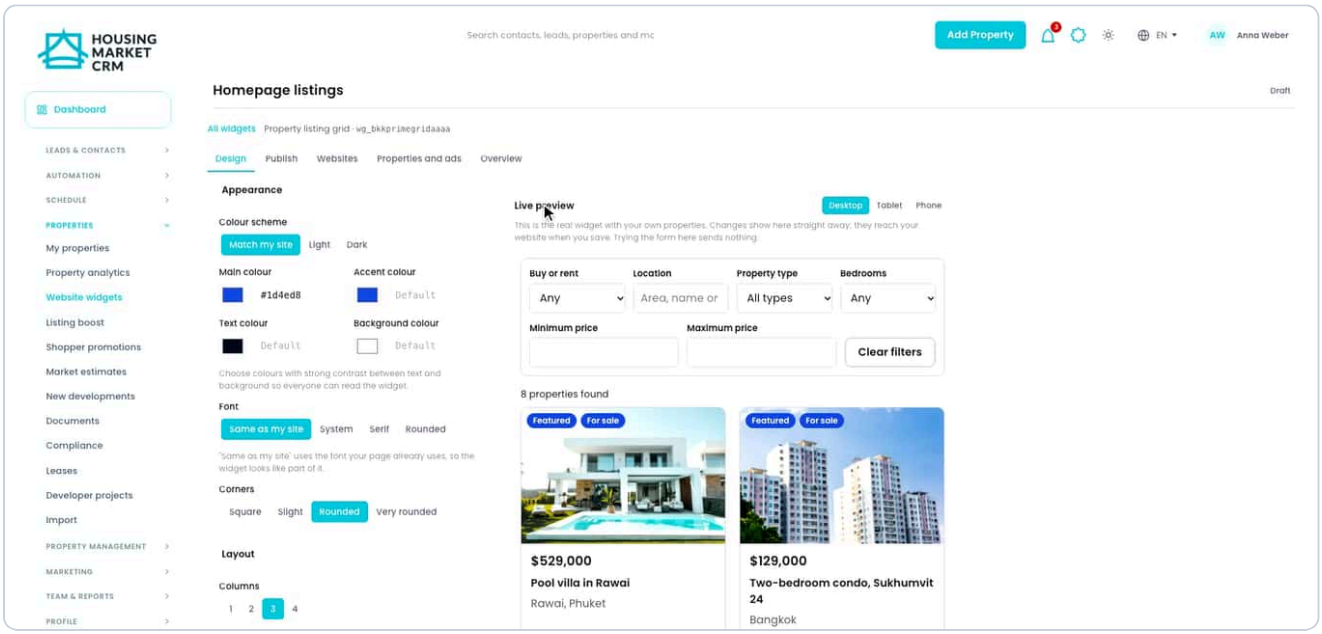


Figure 158.10 · Screen recorded 24 October 2026

11 Choose a **colour scheme**, or **Match my site**.

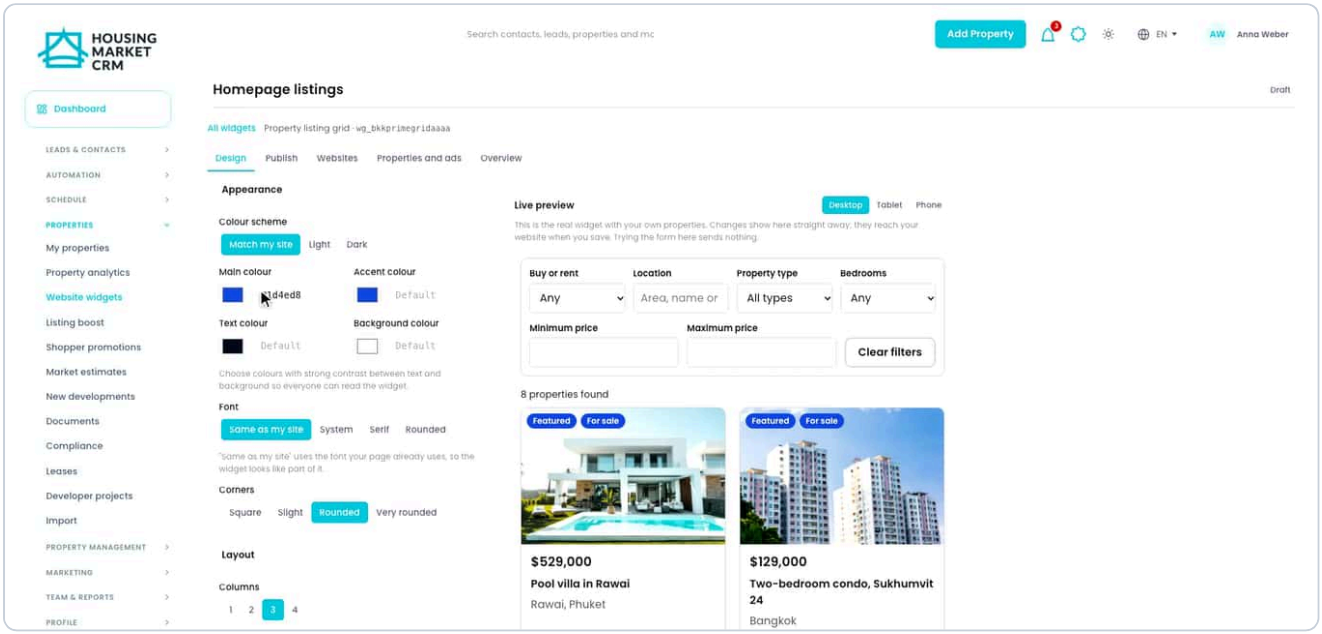


Figure 158.11 · Screen recorded 24 October 2026

12 Pick your **main colour**: buttons and prices use it.

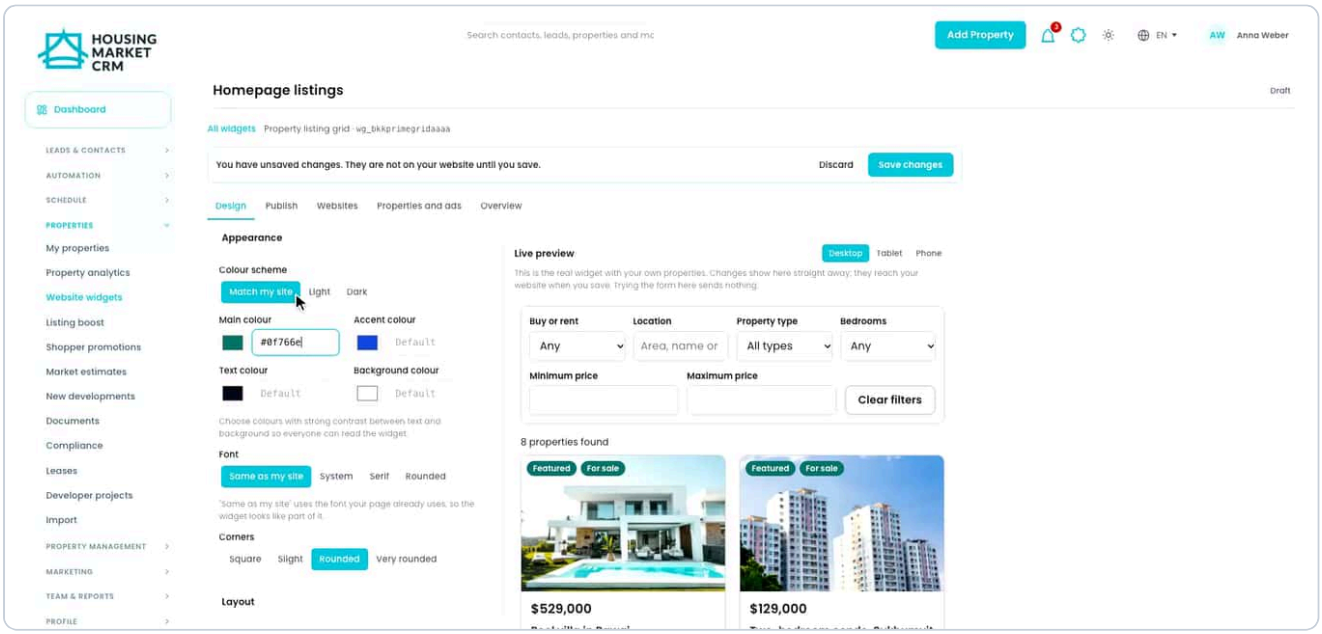


Figure 158.12 · Screen recorded 24 October 2026

13 The preview changes **straight away**.

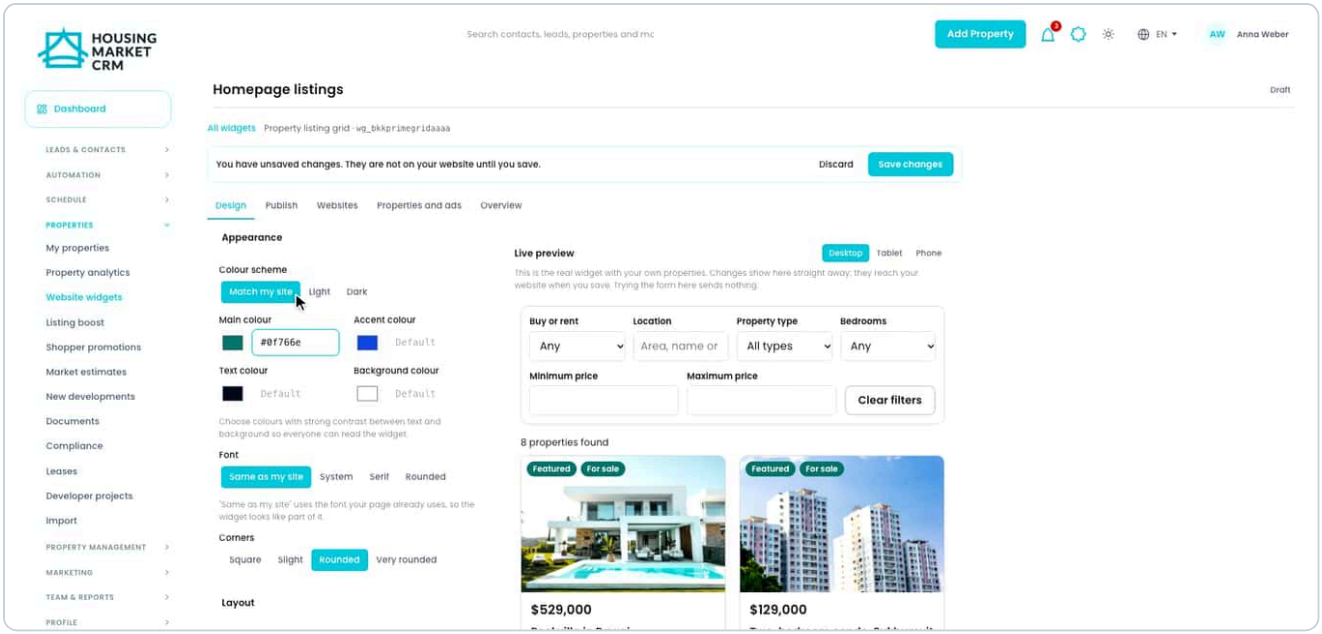


Figure 158.13 · Screen recorded 24 October 2026

14 Pick the **font** and how **rounded** the corners are.

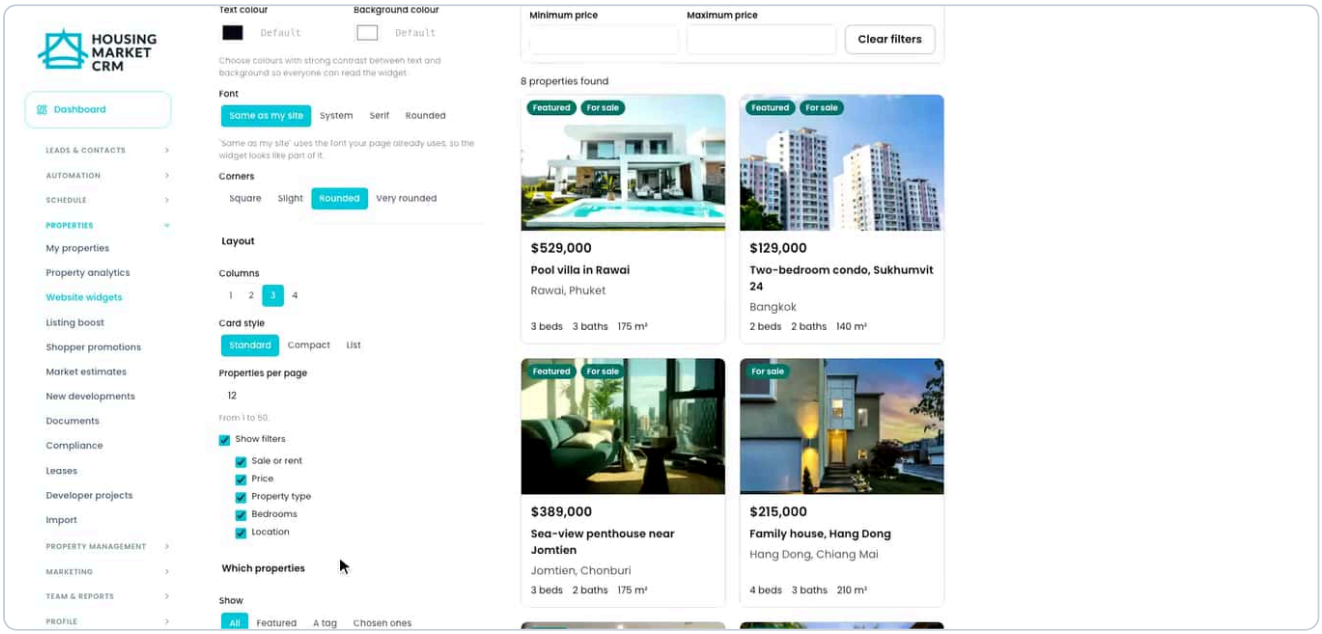


Figure 158.14 · Screen recorded 24 October 2026

15 Under **Layout**, choose the number of columns for example **2 columns**.

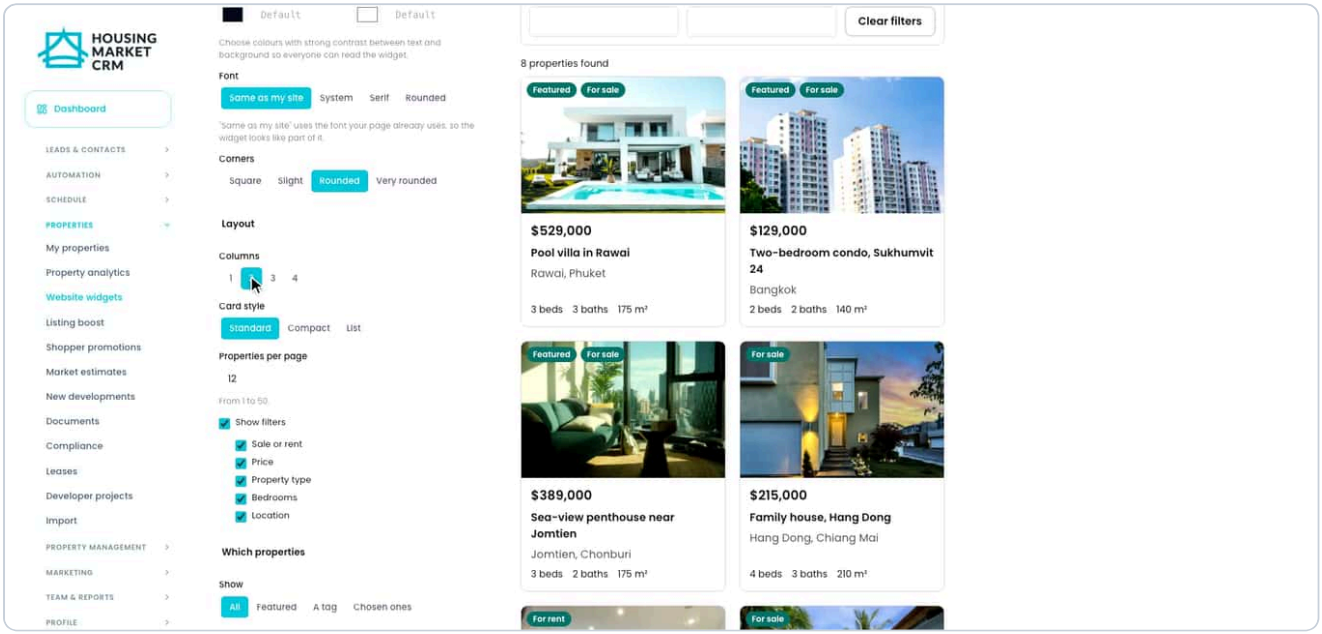


Figure 158.15 · Screen recorded 24 October 2026

16 Switch the **card style** to **Compact** or back to **Standard**.

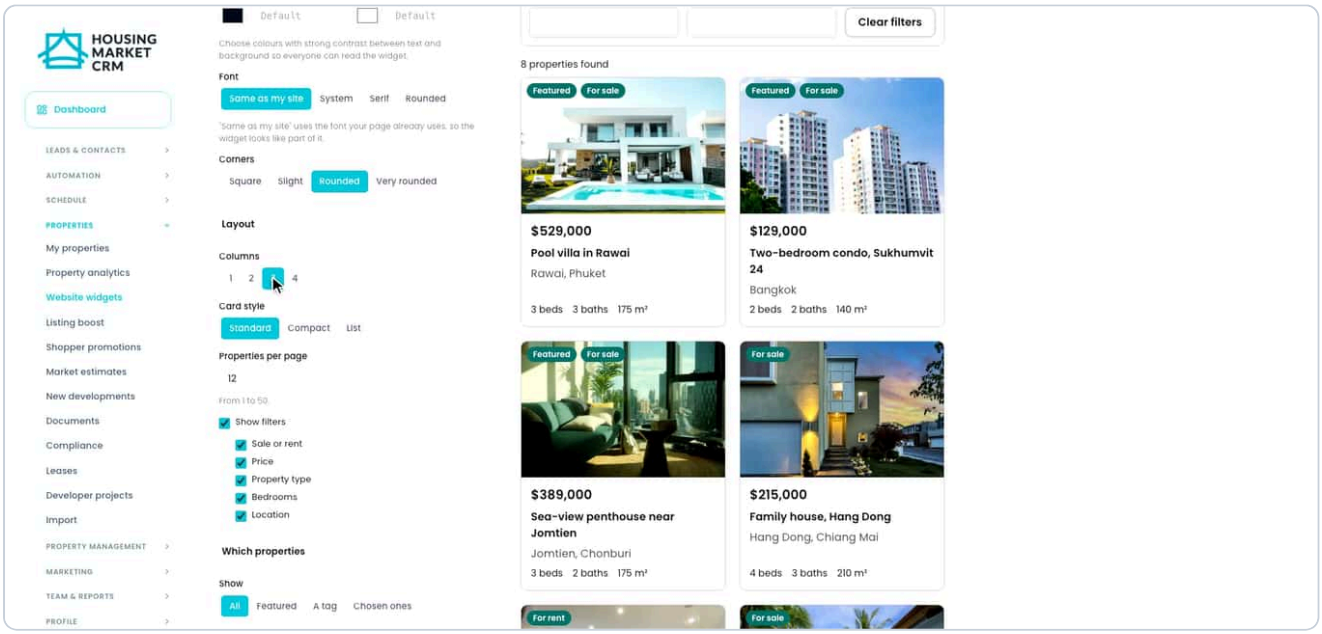


Figure 158.16 · Screen recorded 24 October 2026

17 Choose how many properties show per page.

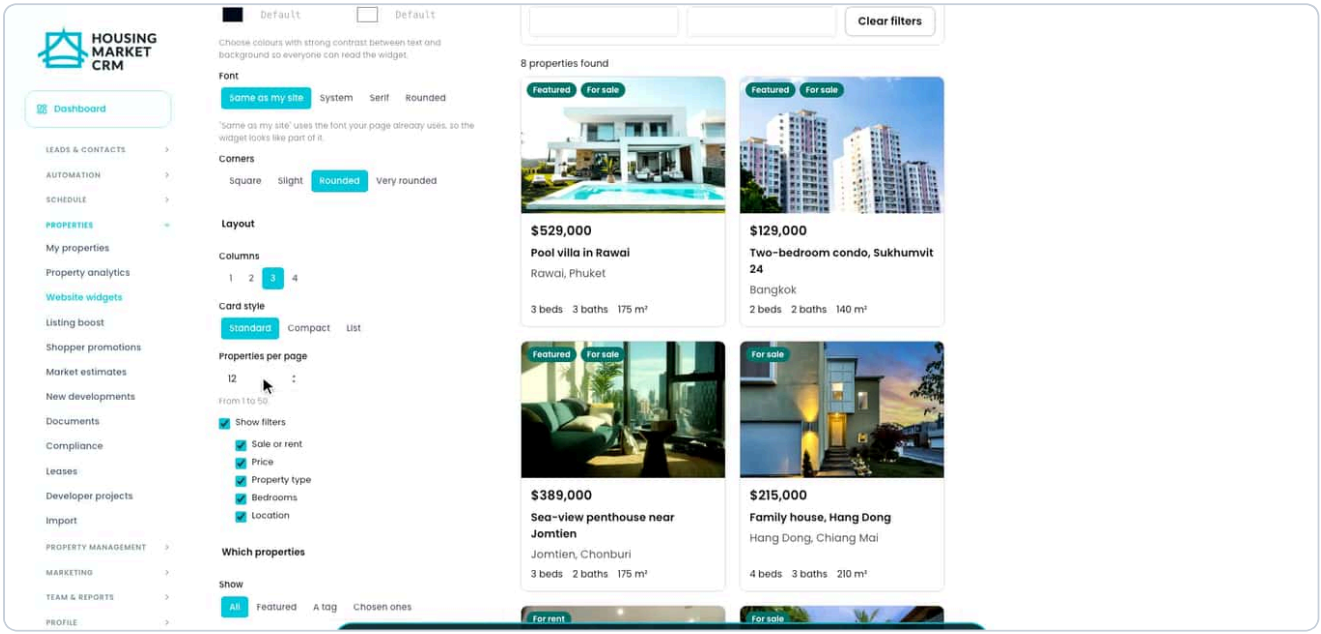


Figure 158.17 · Screen recorded 24 October 2026

18 Decide which **filters** your visitors get: sale or rent, price, type, bedrooms, location.

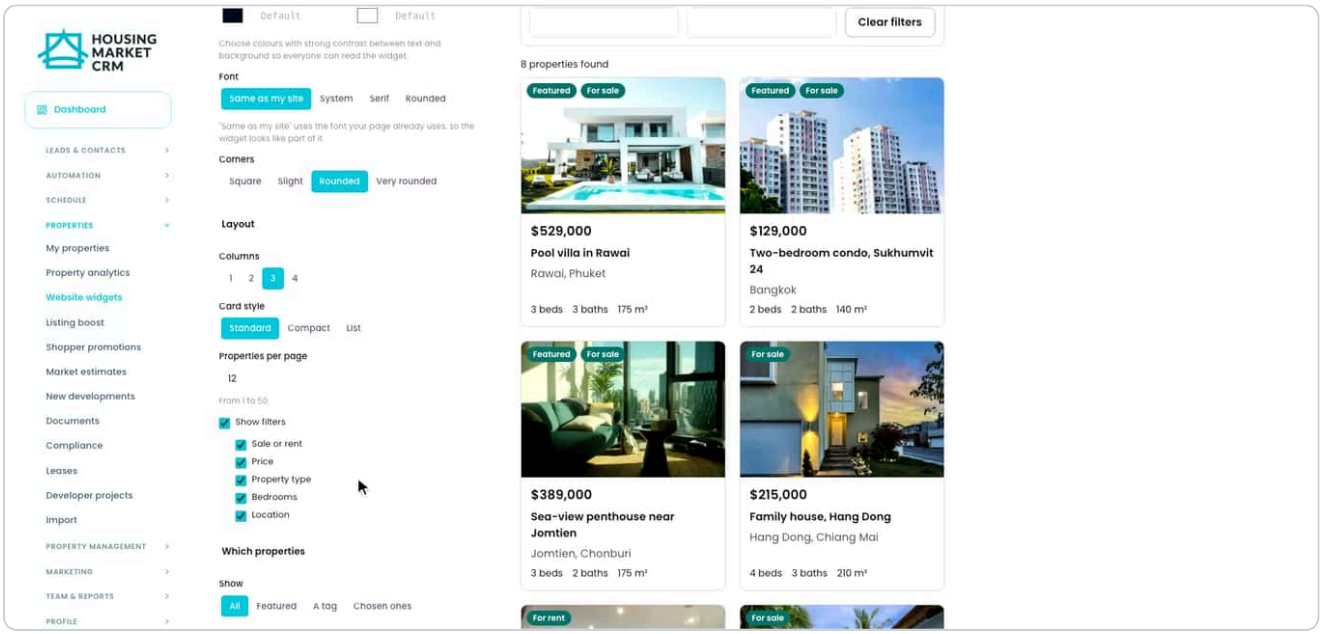


Figure 158.18 · Screen recorded 24 October 2026

19 Turn one **off**, for example **Location**.

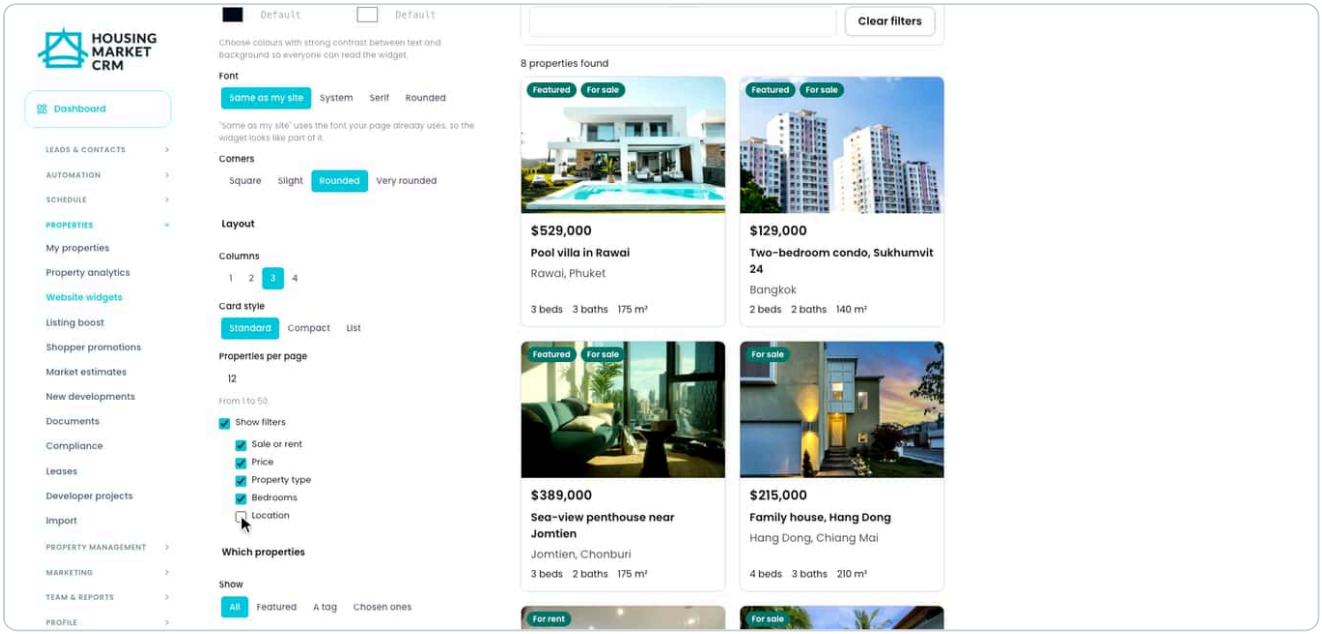


Figure 158.19 · Screen recorded 24 October 2026

20 And back **on**.

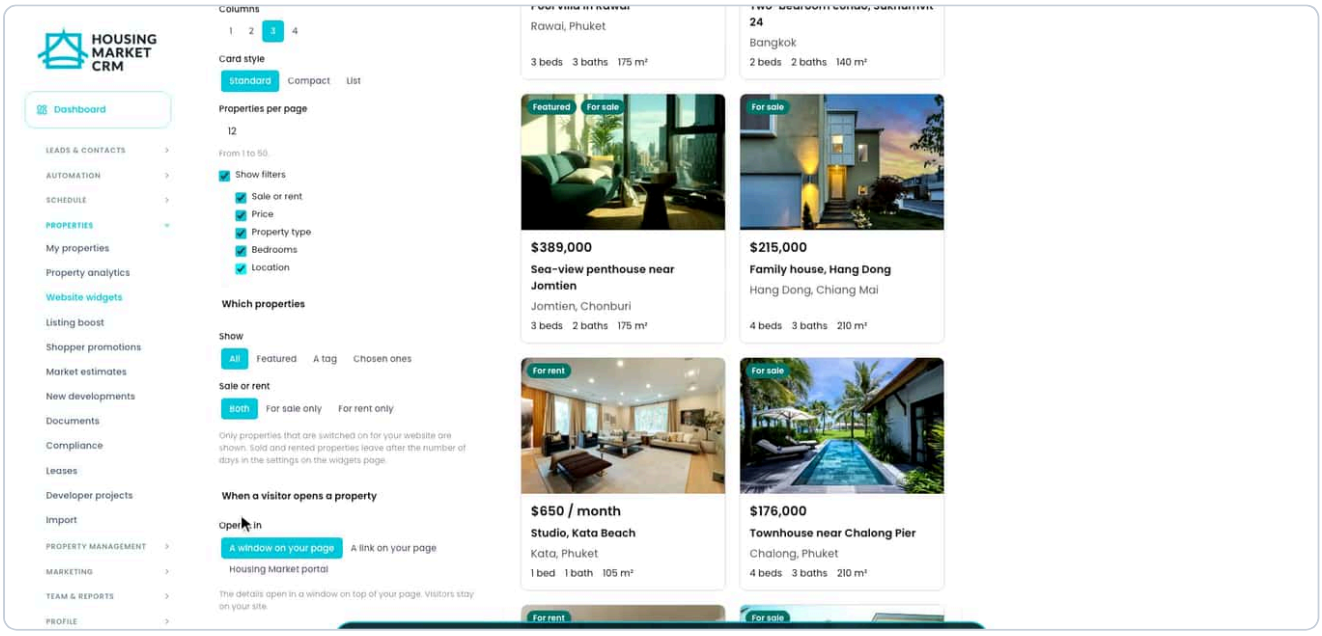


Figure 158.20 · Screen recorded 24 October 2026

21 Choose **which properties** the widget shows: all of them, featured ones, a tag or ones you pick.

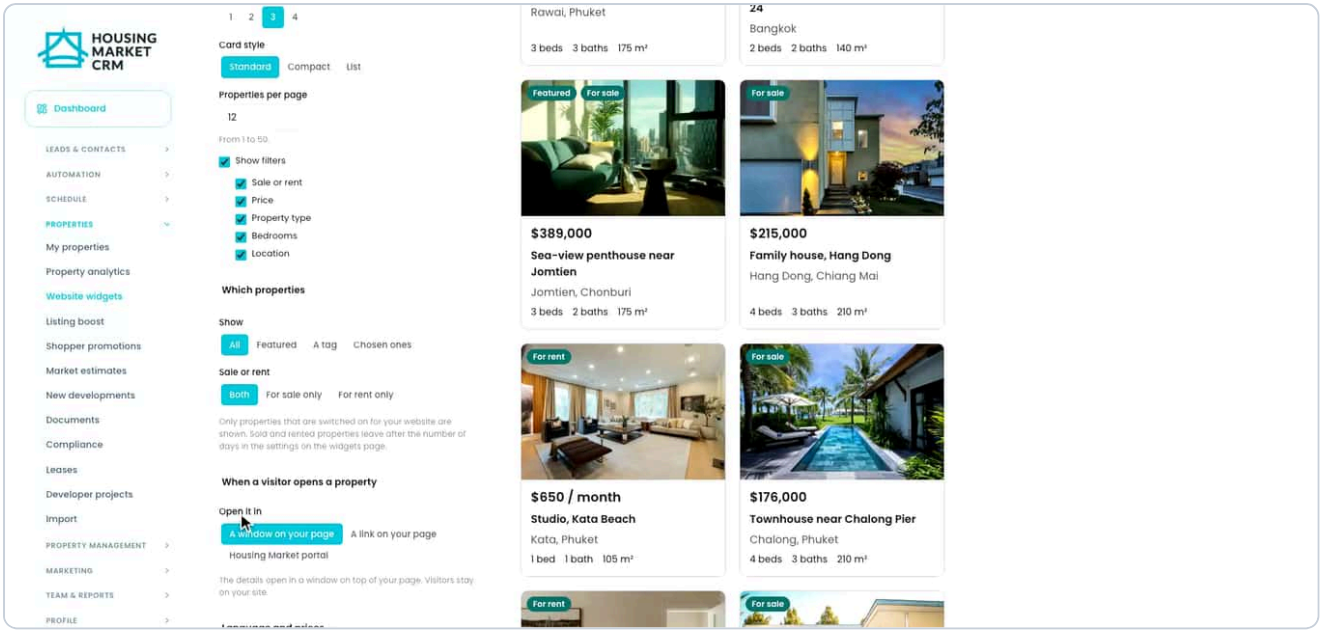


Figure 158.21 · Screen recorded 24 October 2026

22 Show only **Featured** properties or **All** of them.

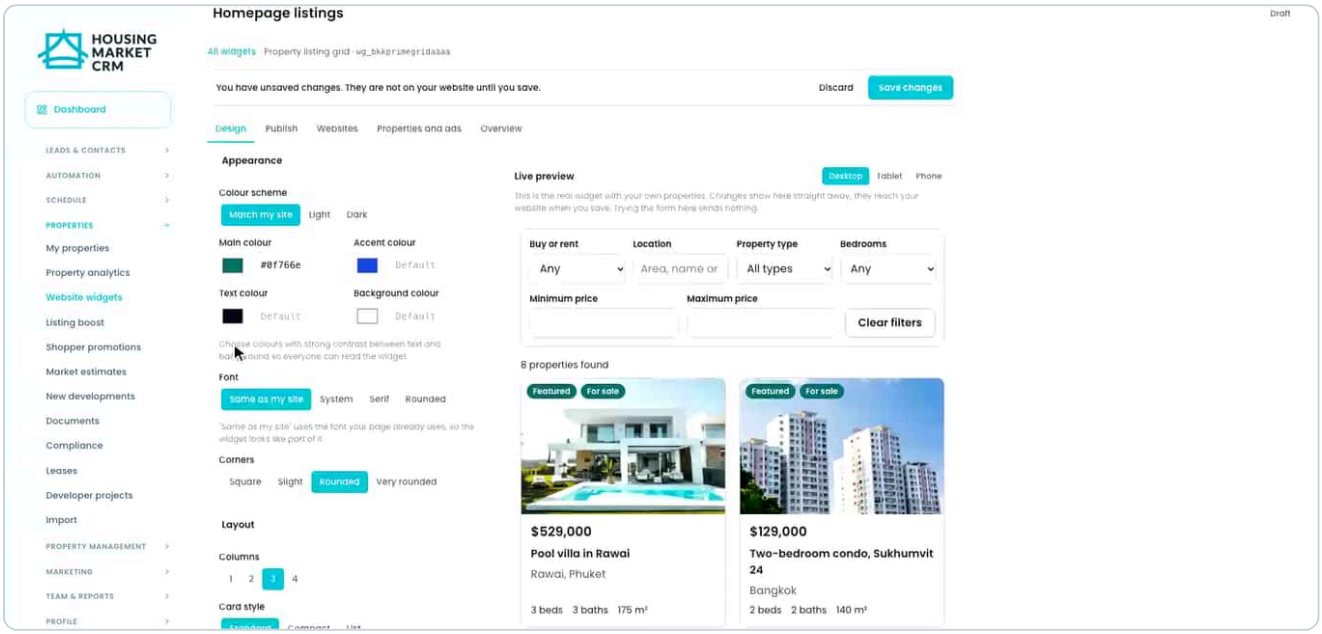


Figure 158.22 · Screen recorded 24 October 2026

23 Nothing is on your website until you **save**.

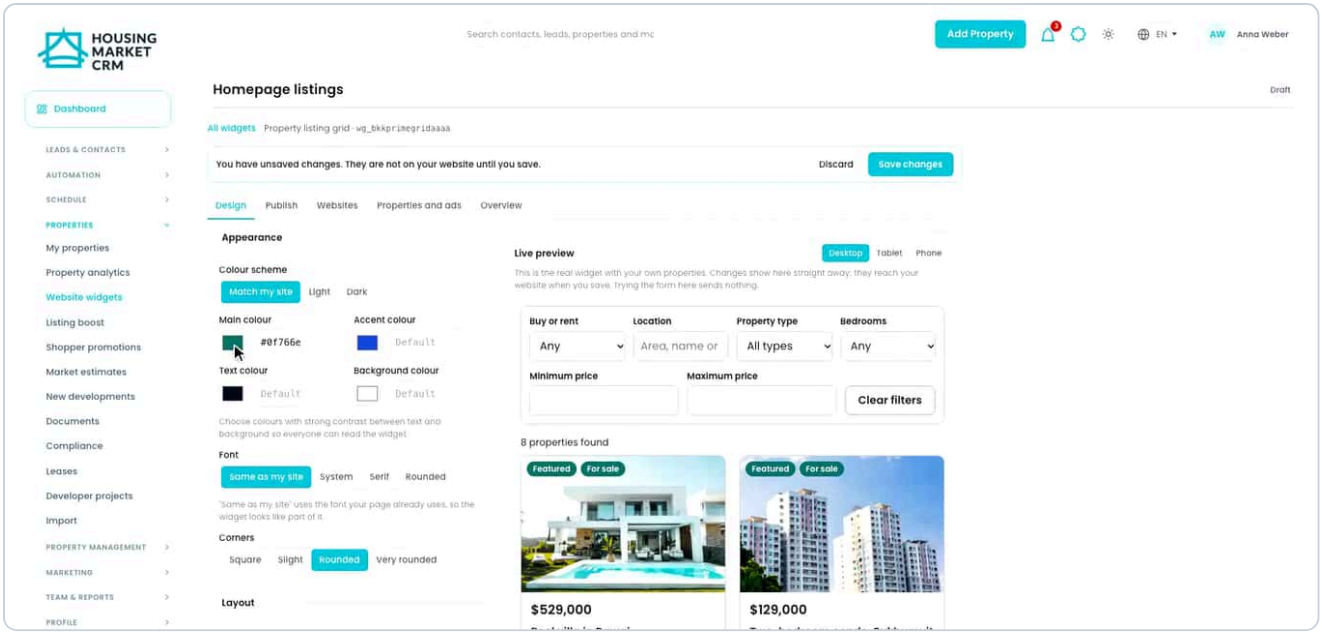


Figure 158.23 · Screen recorded 24 October 2026

24 Click **Save changes**.

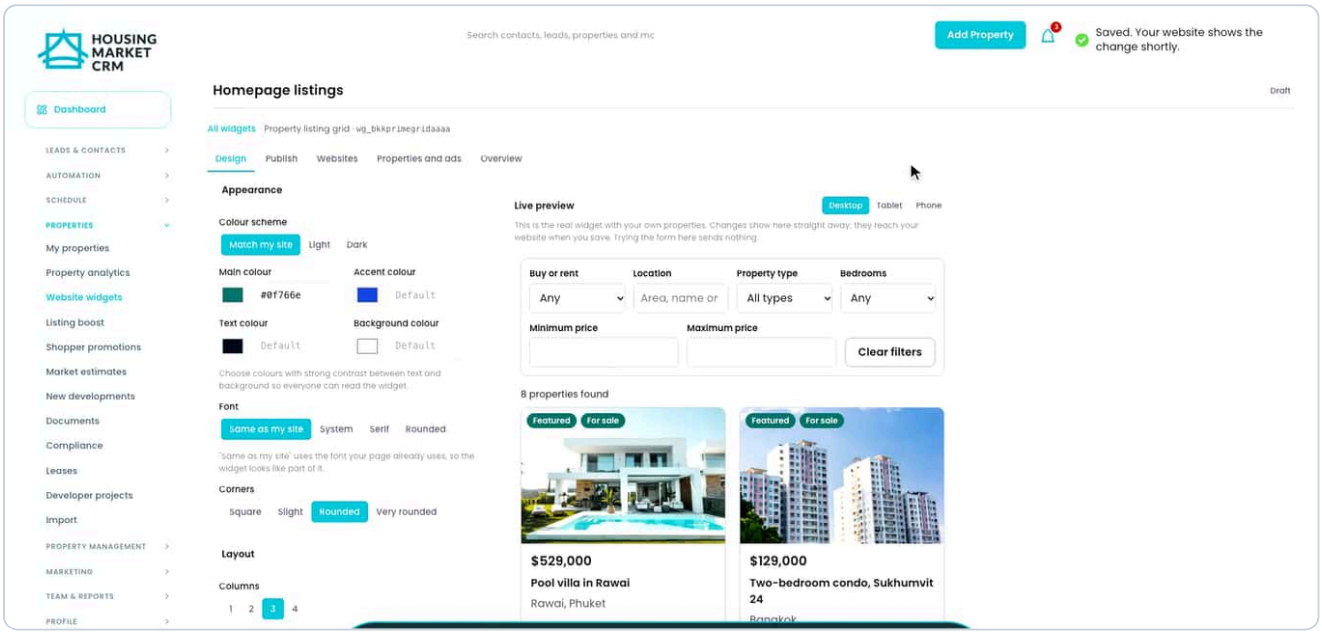


Figure 158.24 · Screen recorded 24 October 2026

25 Your website shows the change shortly. **No code to paste again.**

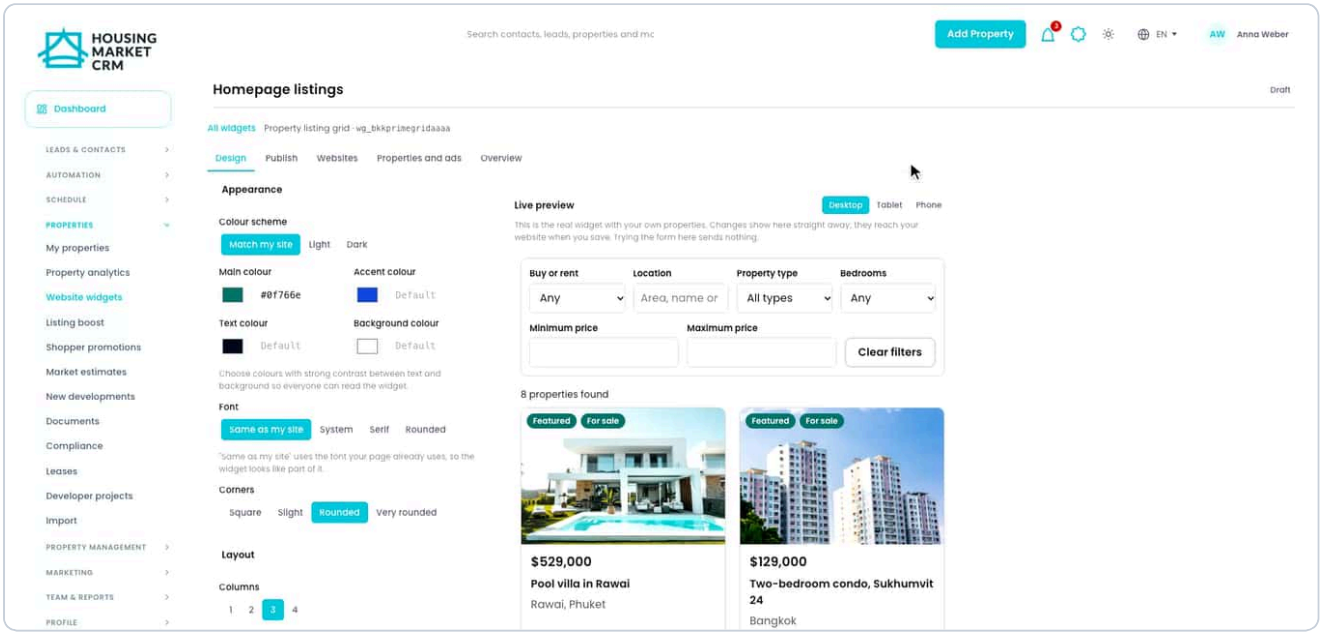


Figure 158.25 · Screen recorded 24 October 2026

26 Open **Overview**.

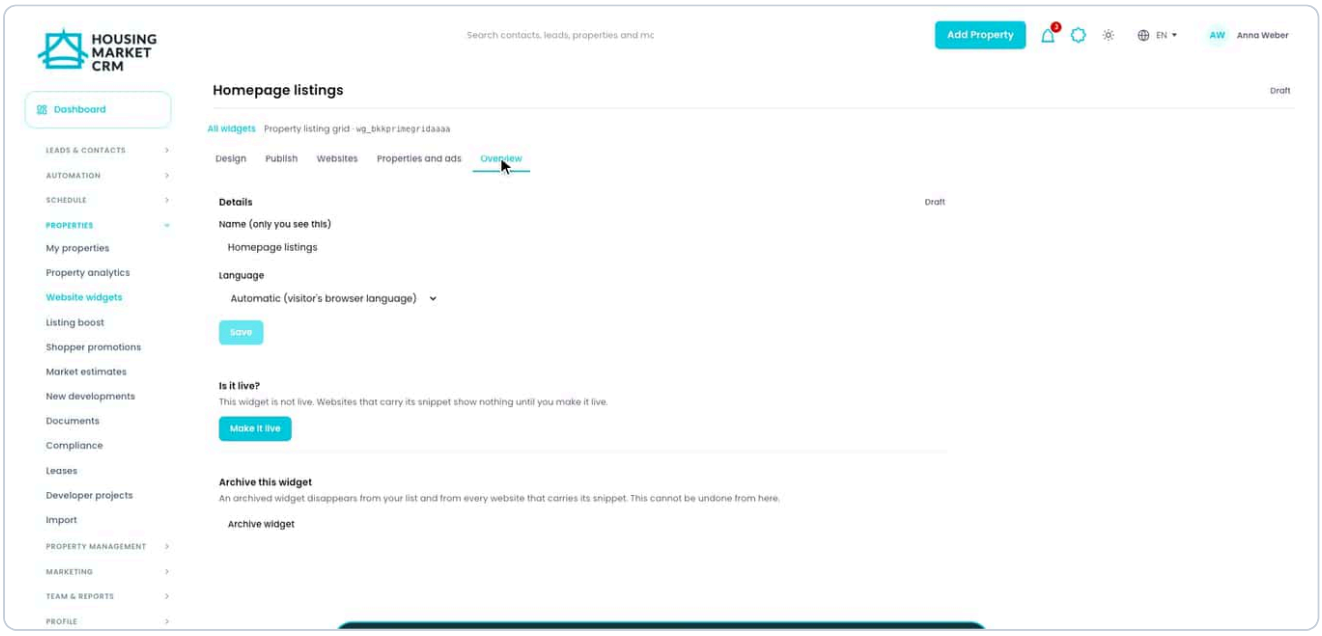


Figure 158.26 · Screen recorded 24 October 2026

27 A new widget is a **Draft**: websites that carry its code show nothing yet.

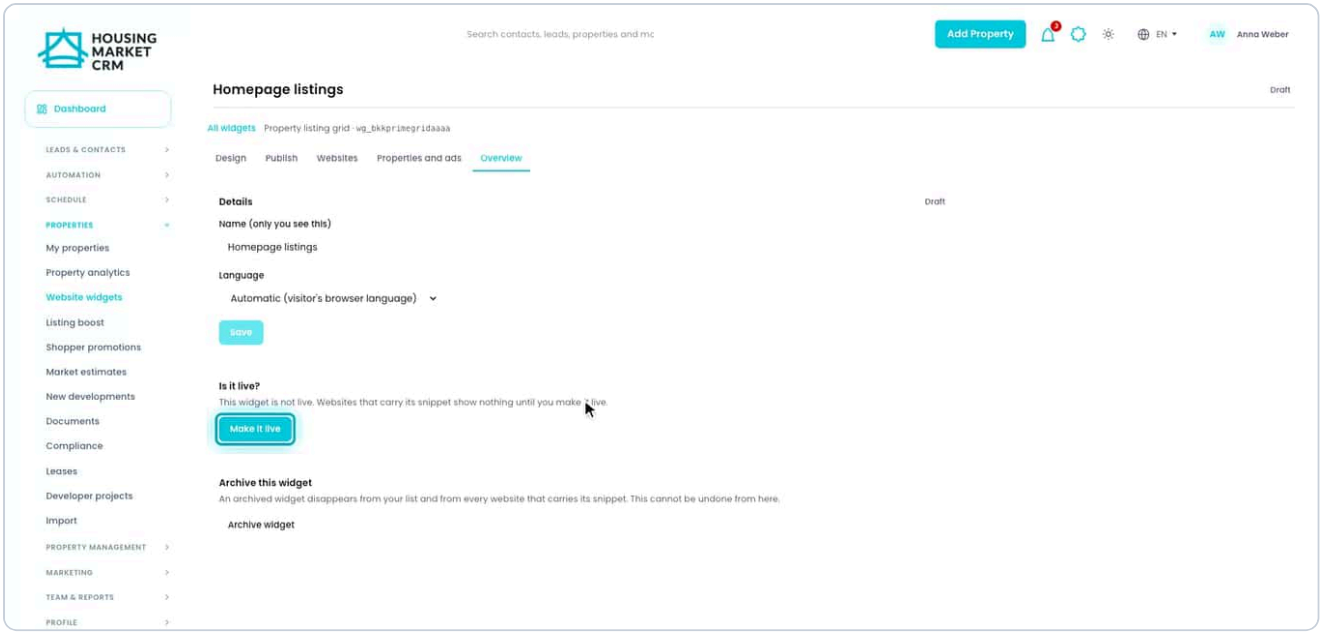


Figure 158.27 · Screen recorded 24 October 2026

28 Click **Make it live**.

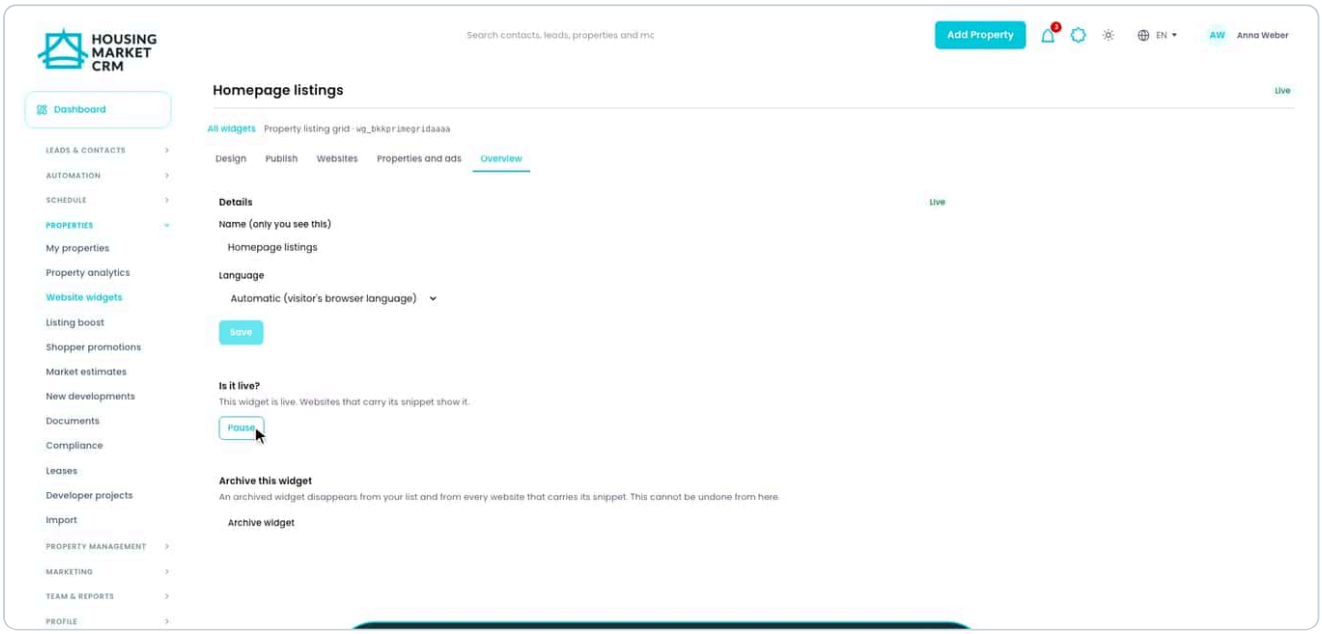


Figure 158.28 · Screen recorded 24 October 2026

29 The widget is **live**. Next: copy its code onto your website.

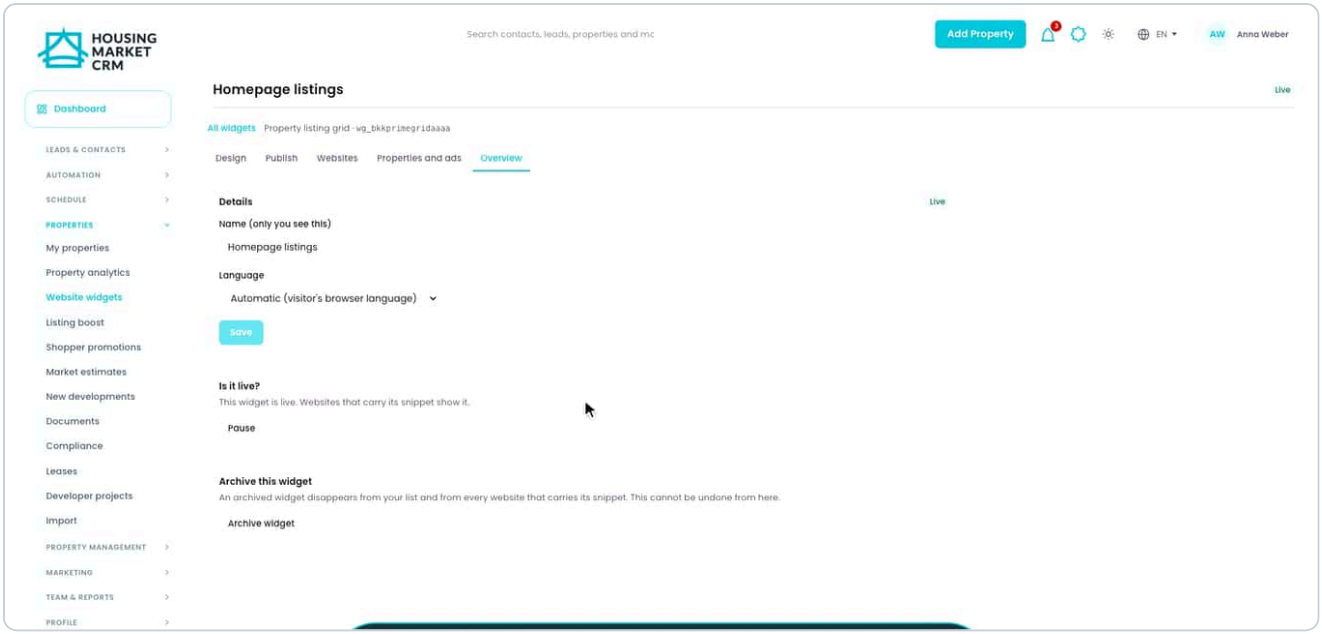


Figure 158.29 · Screen recorded 24 October 2026

RELATED HELP CENTER ARTICLES

What is a property website in the CRM?	faq.housingmarketgroup.com/faq/what-is-a-property-website-in-the-crm

159 CHAPTER 159

Add a widget to your website

Pro and Business | For agents who want their properties on their own website | Watch the video

OVERVIEW

Create the widget in the CRM's Website Widgets section, copy its snippet and paste it into the page where the listings should appear.

- In Housing Market CRM, open Website Widgets and create a widget. Choose its type, design and the properties it shows.
- Under Websites, add the address of your website and prove that it is yours.
- Open the Publish step and copy the snippet. The CRM shows the exact snippet for your widget, with the steps beside it.
- Paste it into your website where the listings should appear, then publish the page and check it.

The snippet has two parts: a script line that loads the widget once per page, however many widgets the page has, and a short placeholder line that marks where the widget appears. The script line looks like this: <script async src="..."></script>. Copy the real snippet from the CRM rather than typing it.

- Wix: Add elements, then Embed Code, then Embed HTML, and paste the snippet as code.
- Squarespace: add a Code block and paste the snippet. Code blocks depend on your Squarespace plan.
- Webflow: add an Embed element and paste the snippet, then publish the site.
- Shopify: in the theme customiser, add a Custom Liquid section and paste the snippet.
- WordPress: add a Custom HTML block and paste the snippet, or use the Housing Market WordPress plugin.
- Any other website: paste the snippet into the page's HTML where the listings should appear.

If your website builder removes script tags, the Pro plan offers an iframe version of the snippet that needs no script on your page. If the widget does not appear after pasting, see the answer in this section about a widget that is not showing.

From the Help Center: **How do I add the Website Widget to my website?**

STEP BY STEP

1 This is your **Housing Market CRM** dashboard.

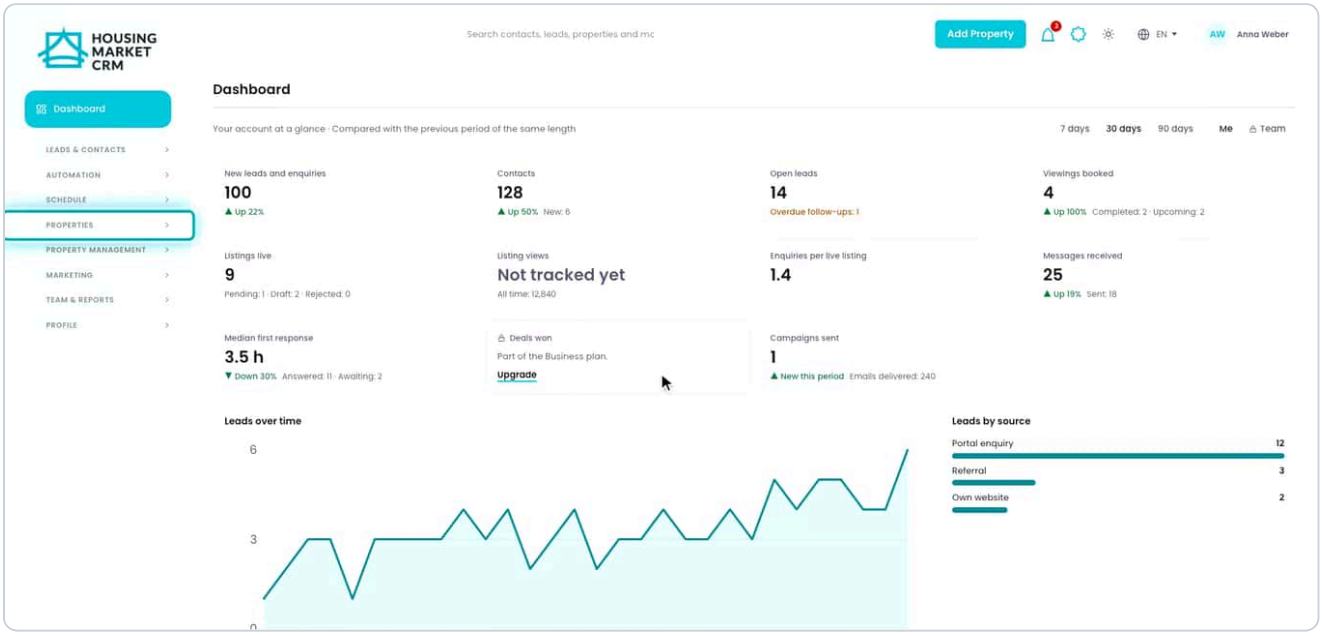


Figure 159.1 · Screen recorded 24 October 2026

2 Open **Properties** in the left menu.

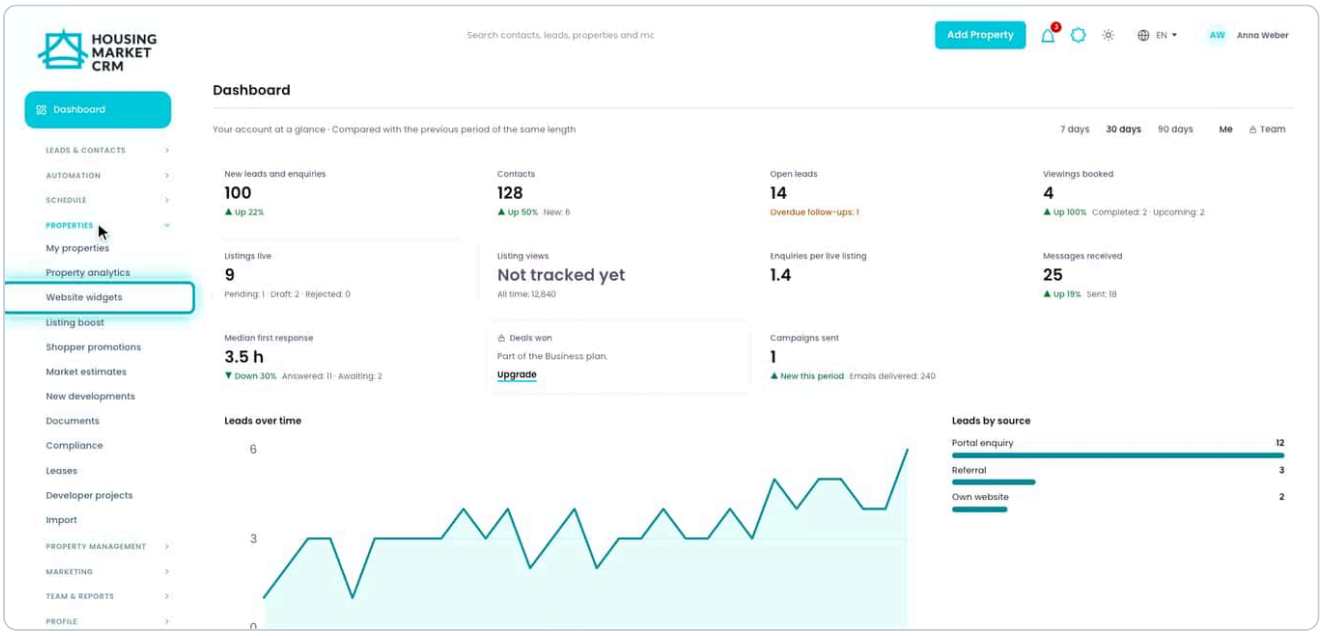


Figure 159.2 · Screen recorded 24 October 2026

3 Click **Website widgets.**

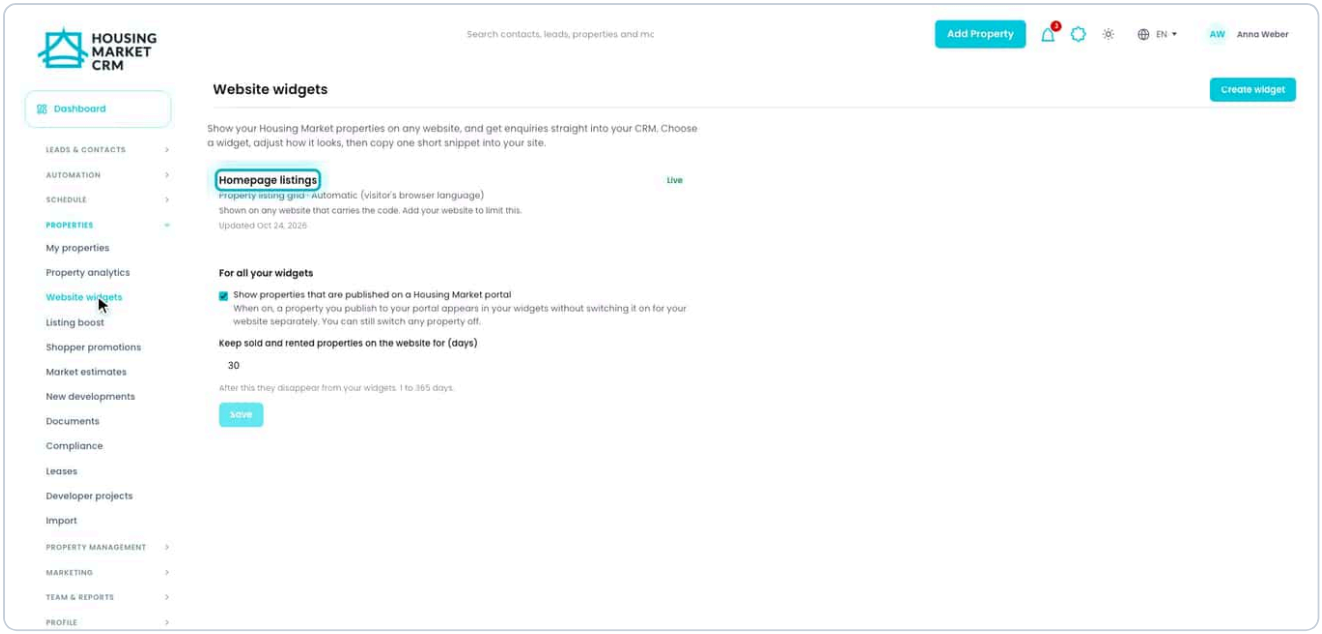


Figure 159.3 · Screen recorded 24 October 2026

4 Open **Homepage listings.**

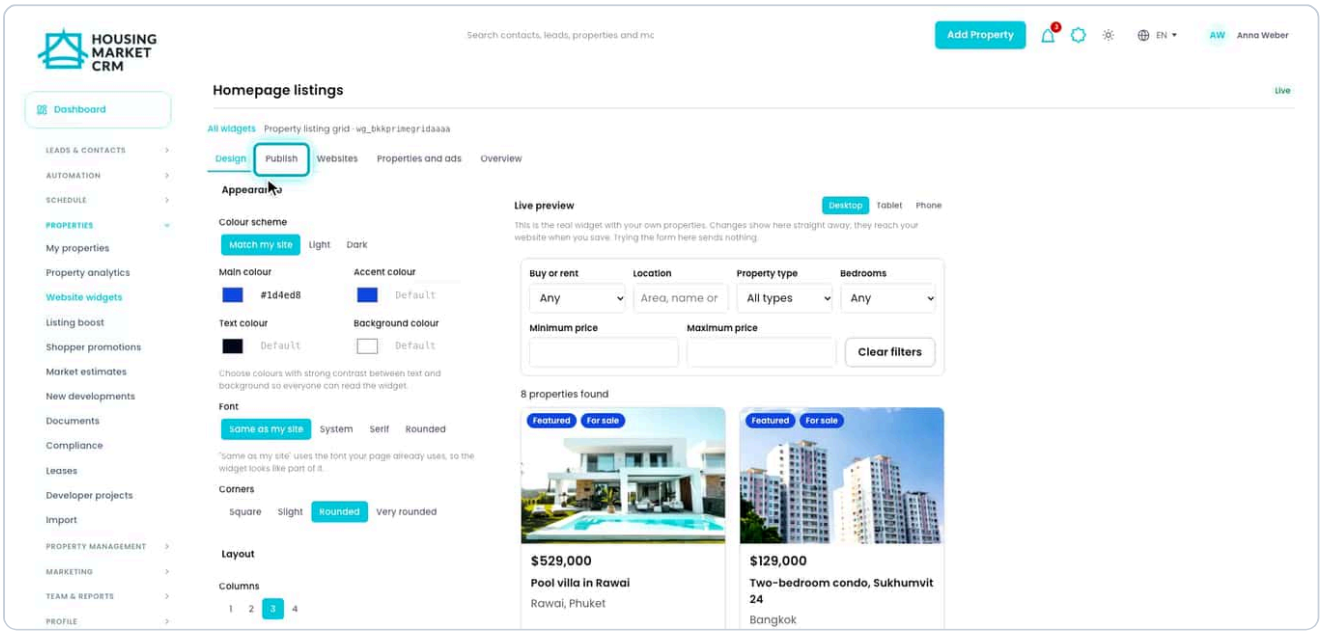


Figure 159.4 · Screen recorded 24 October 2026

5 Open the **Publish** tab.

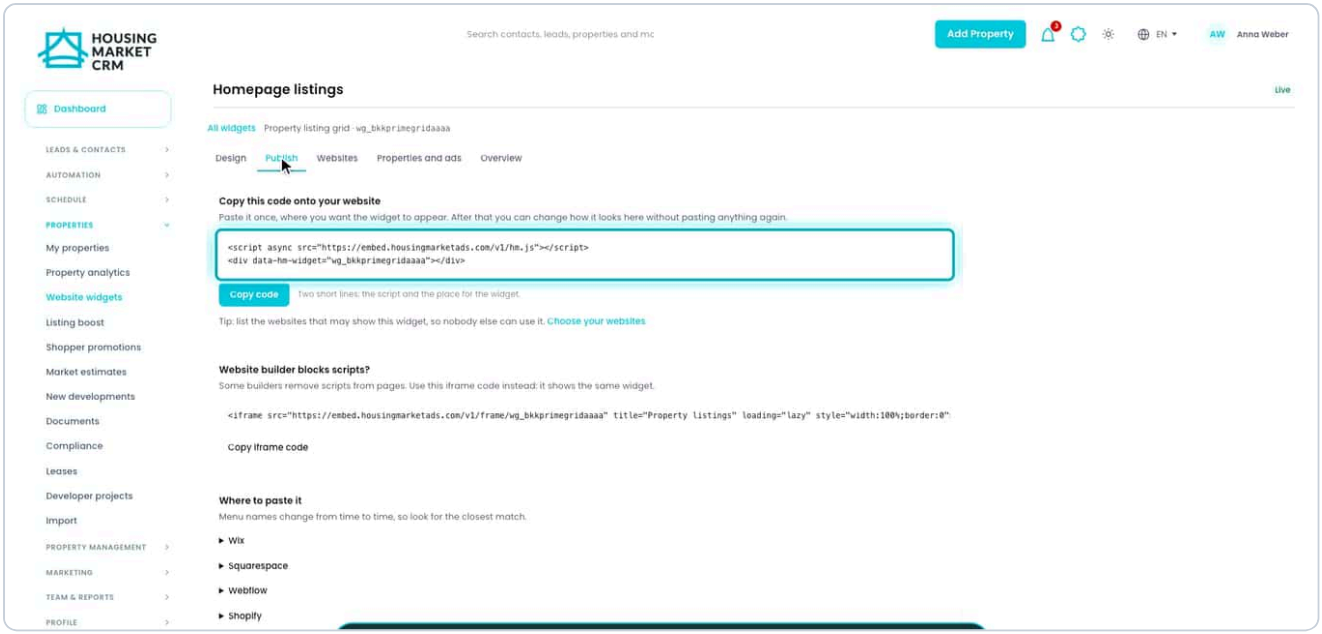


Figure 159.5 · Screen recorded 24 October 2026

6 This short **code** is all your website needs. It is **two lines**: the script and the place for the widget.

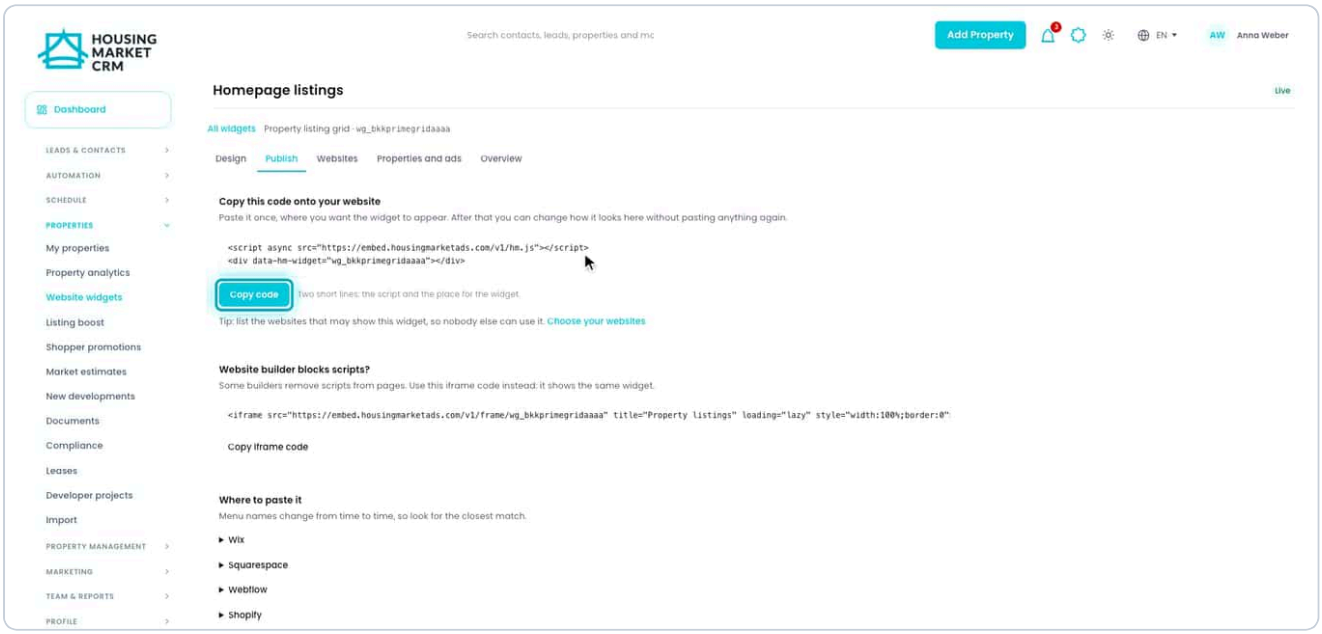


Figure 159.6 · Screen recorded 24 October 2026

7 Click **Copy code**.

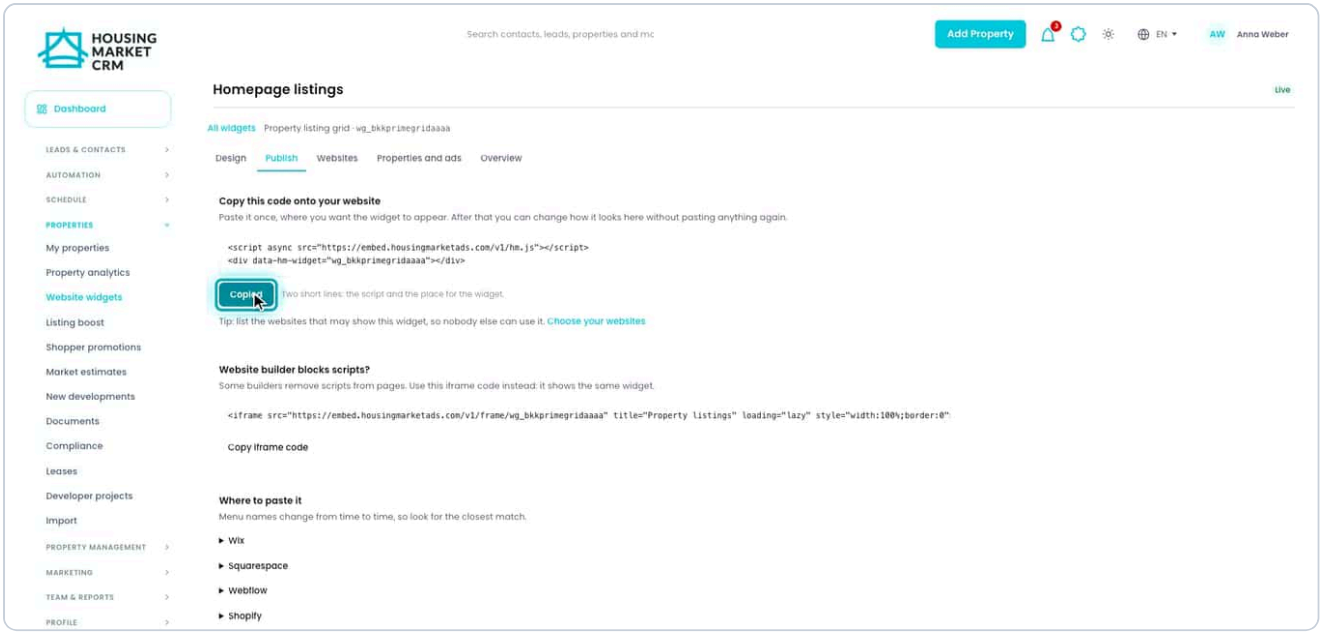


Figure 159.7 · Screen recorded 24 October 2026

8 It is **copied** to your clipboard.

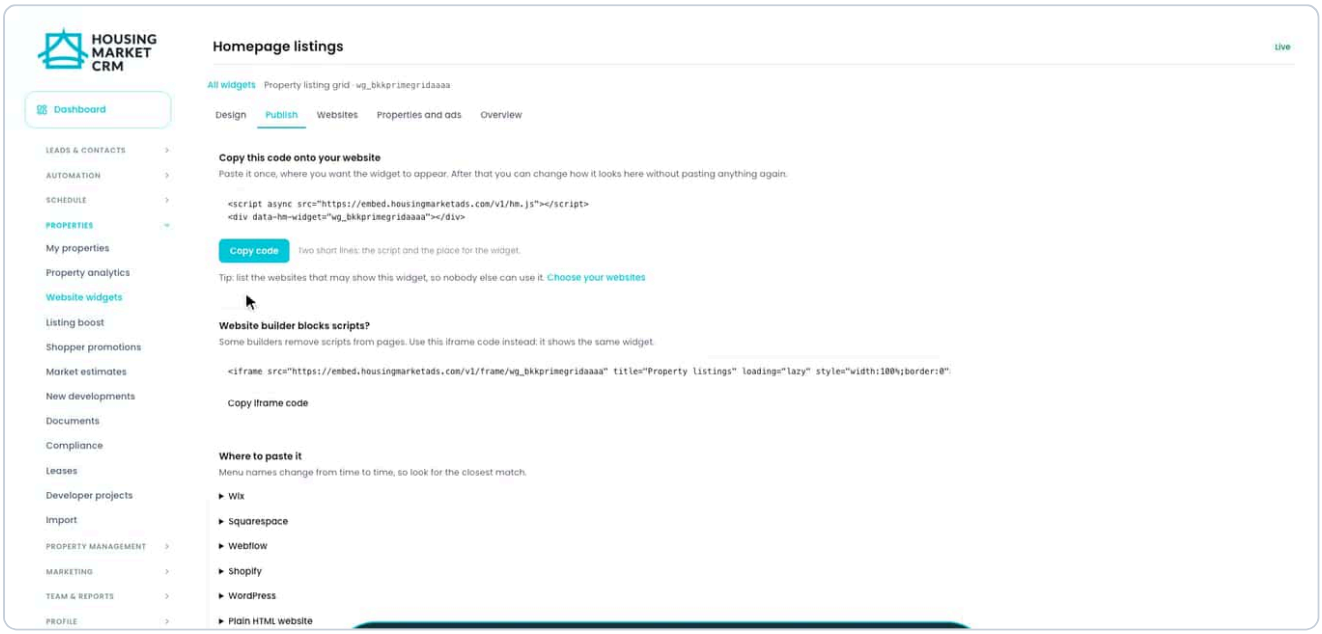


Figure 159.8 · Screen recorded 24 October 2026

9 Every website builder has its own place for **custom code**.

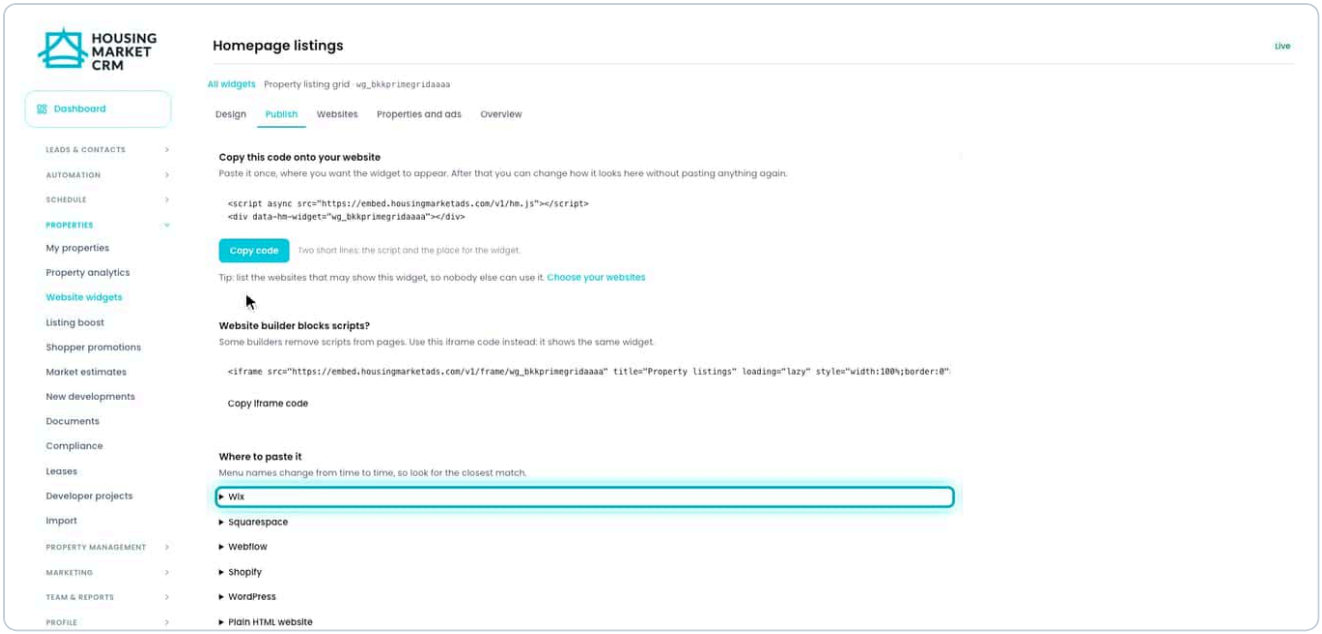


Figure 159.9 · Screen recorded 24 October 2026

10 **Wix**: Add Elements, Embed Code, Embed HTML.

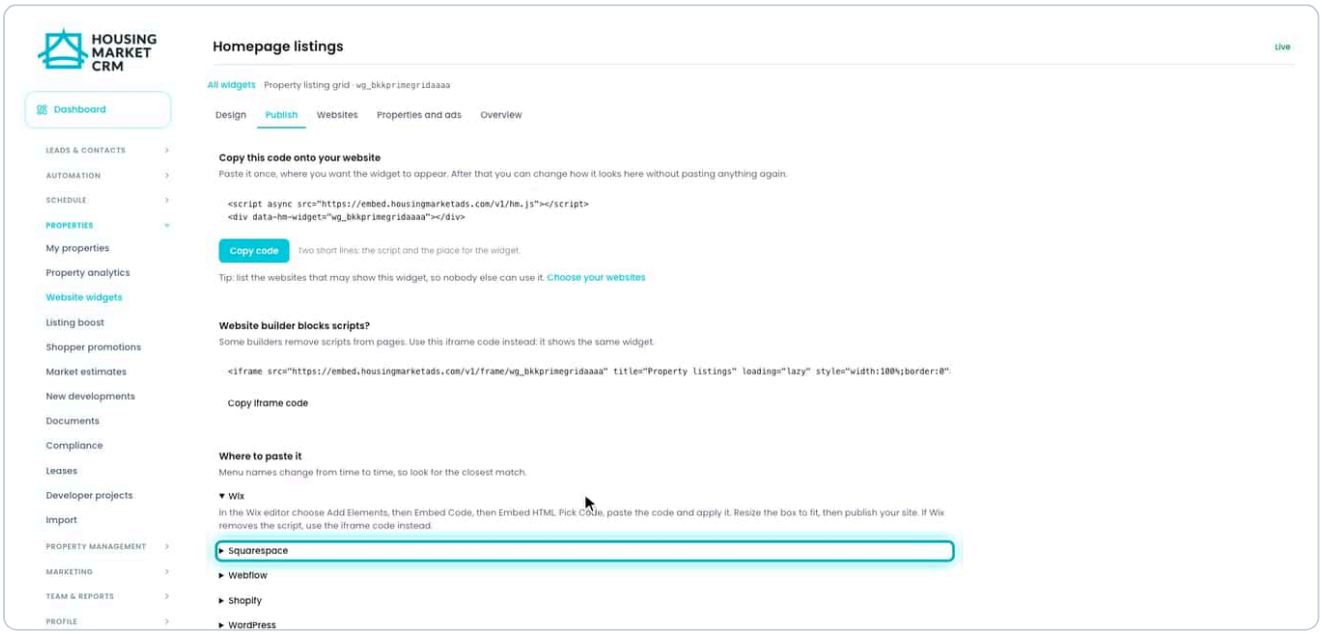


Figure 159.10 · Screen recorded 24 October 2026

11 Squarespace: add a Code block.

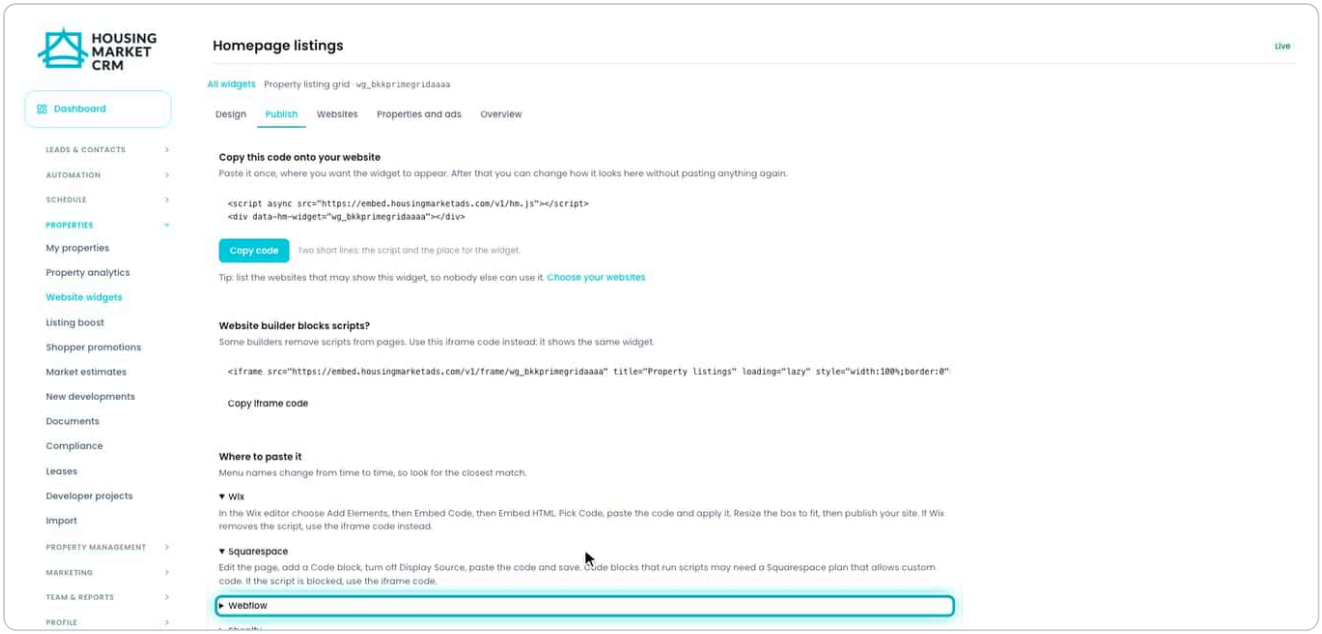


Figure 159.11 · Screen recorded 24 October 2026

12 Webflow: add an Embed element.

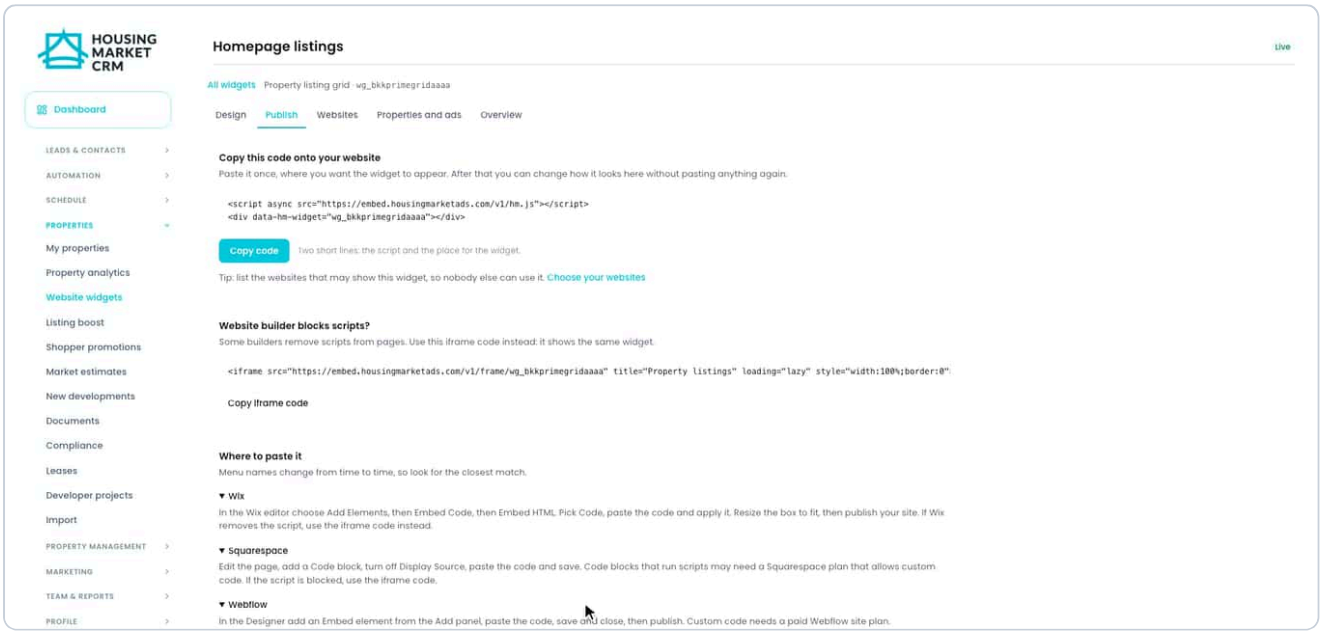


Figure 159.12 · Screen recorded 24 October 2026

13 On a **plain HTML page**, paste it inside the body.

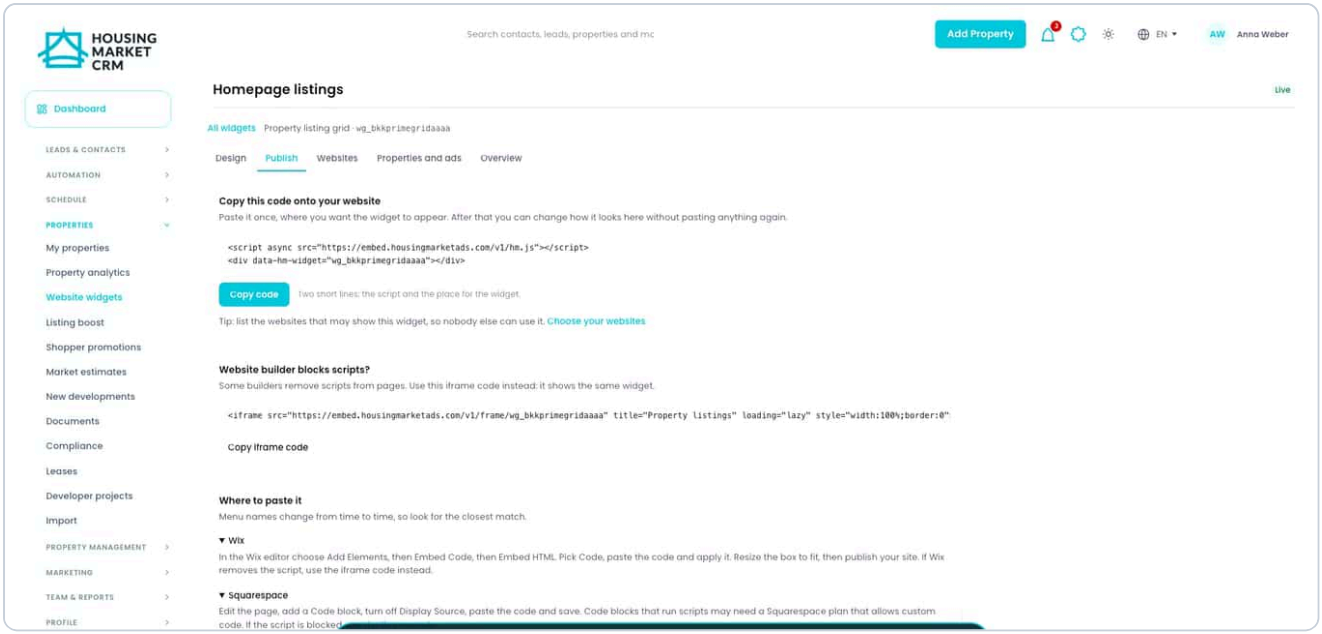


Figure 159.13 · Screen recorded 24 October 2026

14 If your builder **removes scripts**, use the **iframe code** instead. It shows the same widget.

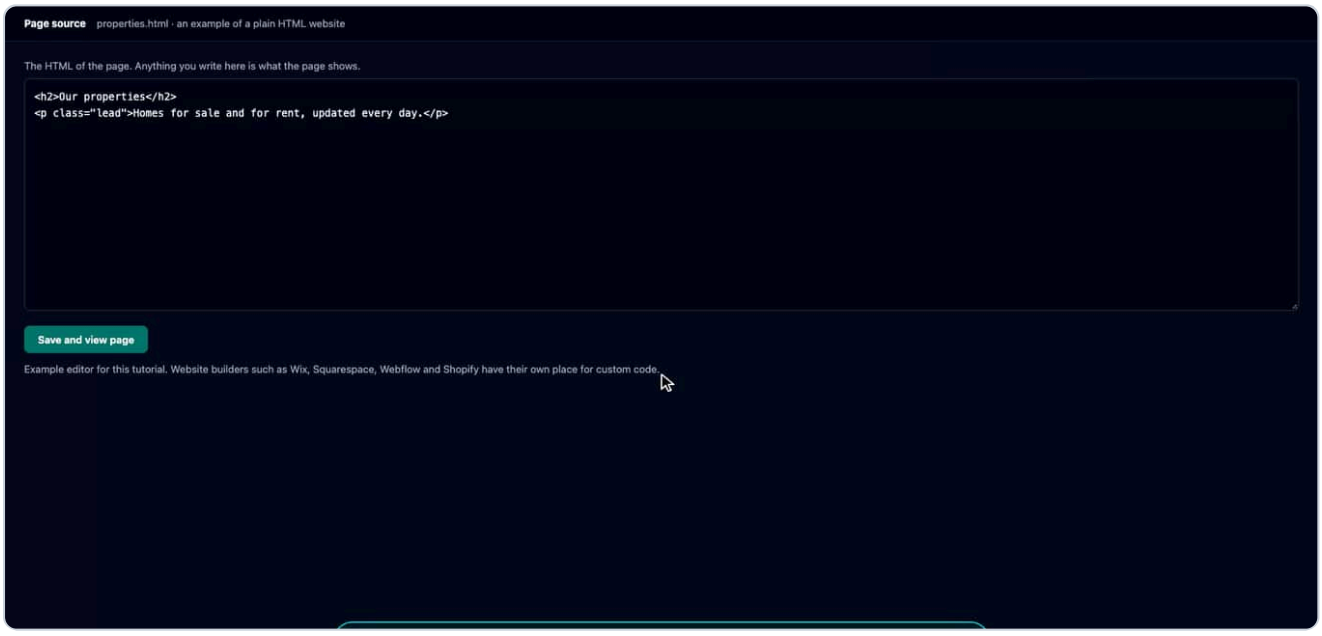


Figure 159.14 · Screen recorded 24 October 2026

15 Here is the **Properties page** of a website. Open the page where the widget should go.



Figure 159.15 · Screen recorded 24 October 2026

16 Click in the page where the widget should appear and **paste** the code.



Figure 159.16 · Screen recorded 24 October 2026

17 Save the page.

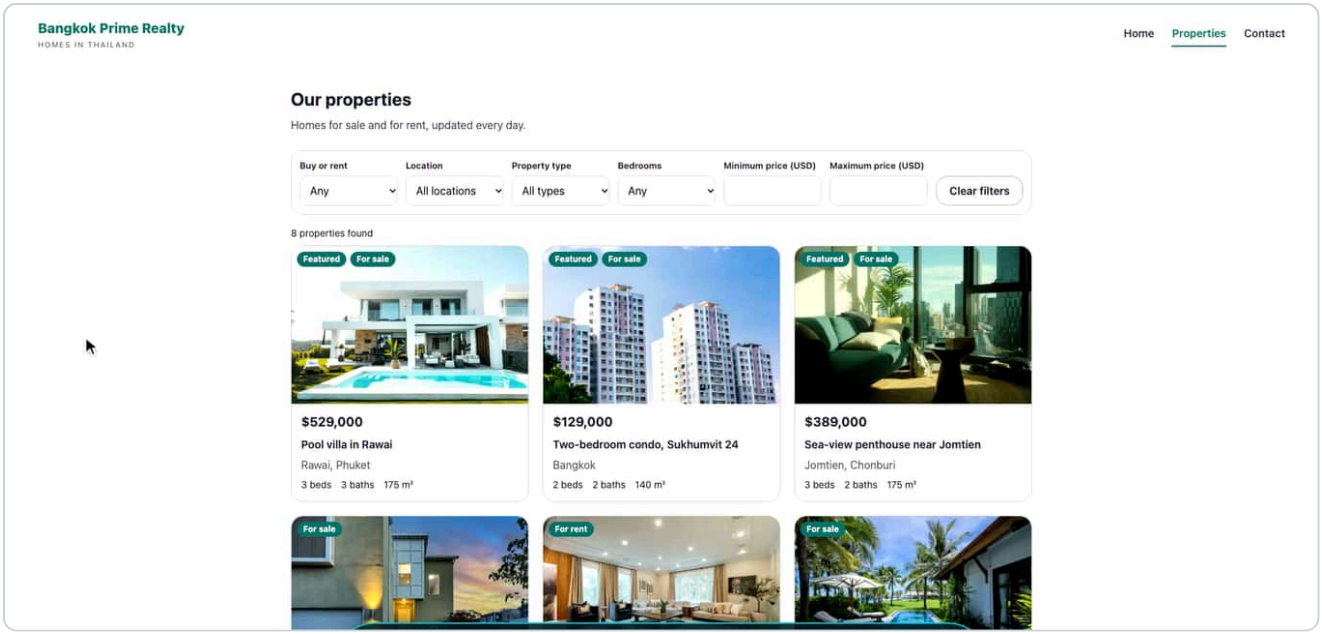


Figure 159.17 · Screen recorded 24 October 2026

18 Your properties are on the page, with their photos and prices.

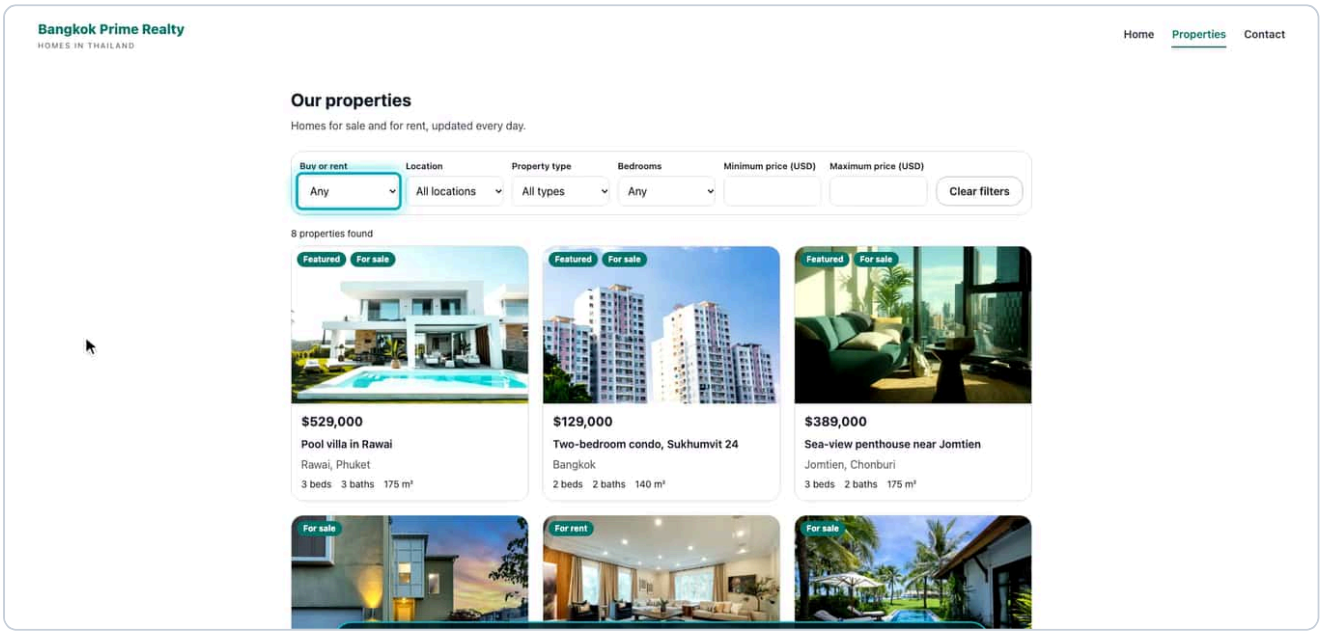


Figure 159.18 · Screen recorded 24 October 2026

19 Visitors can **filter** by sale or rent, price, type, bedrooms and location.

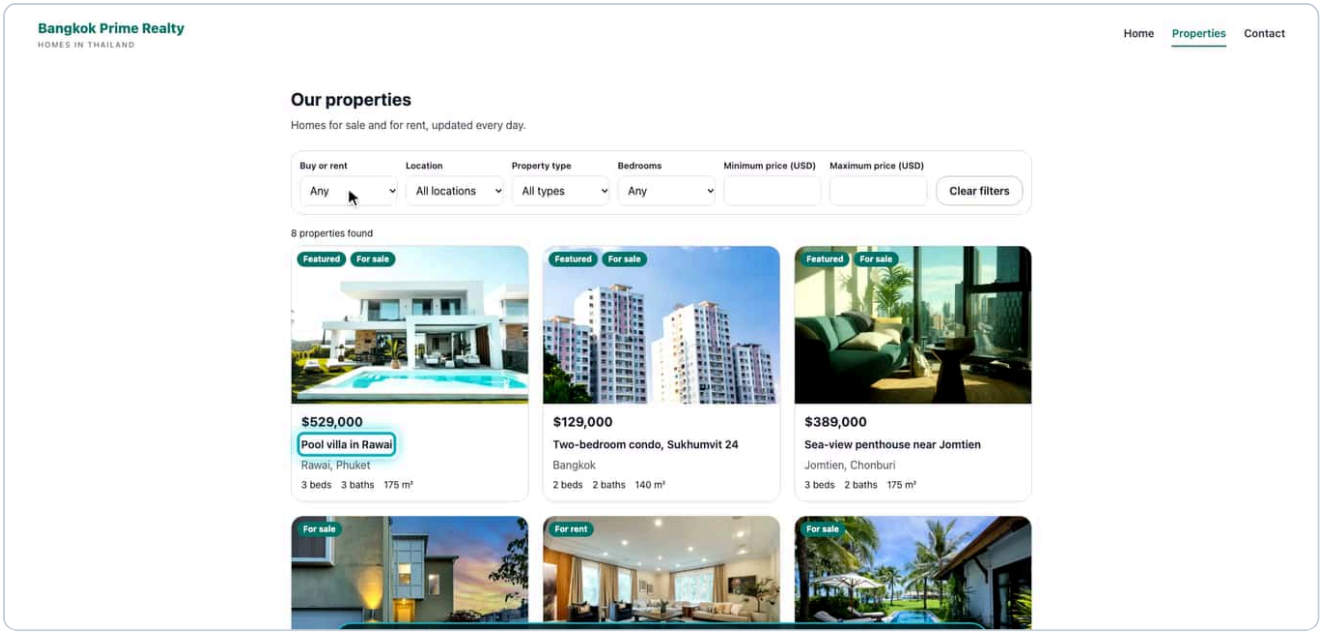


Figure 159.19 · Screen recorded 24 October 2026

20 Click a property to open its **details** in a window, without leaving your site.

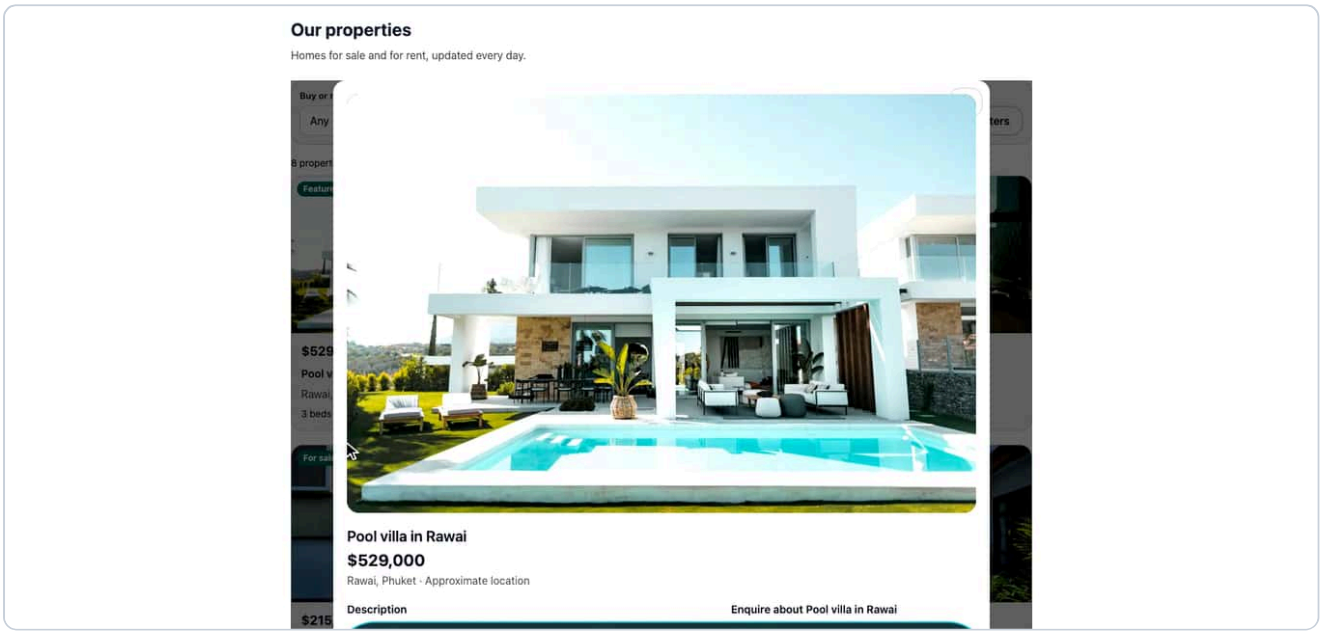


Figure 159.20 · Screen recorded 24 October 2026

21 Visitors see the photos, the description and a form to **enquire**.

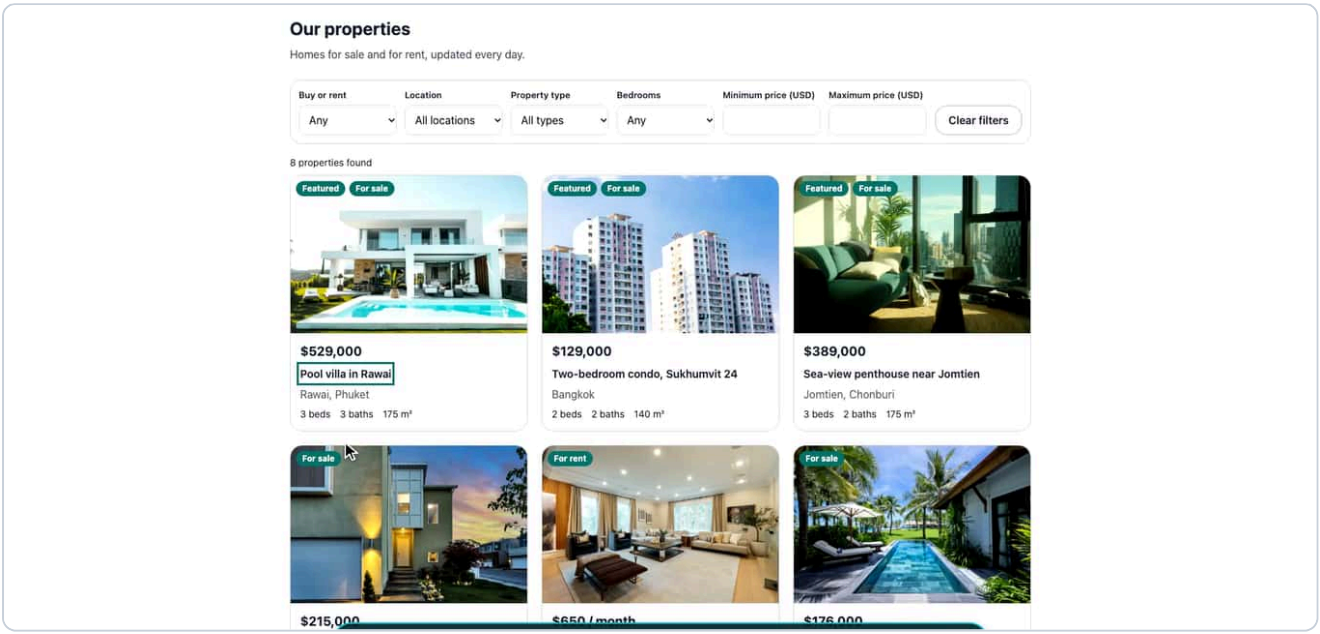


Figure 159.21 · Screen recorded 24 October 2026

22 Change the design in the CRM and this page follows. **No new code to paste.**

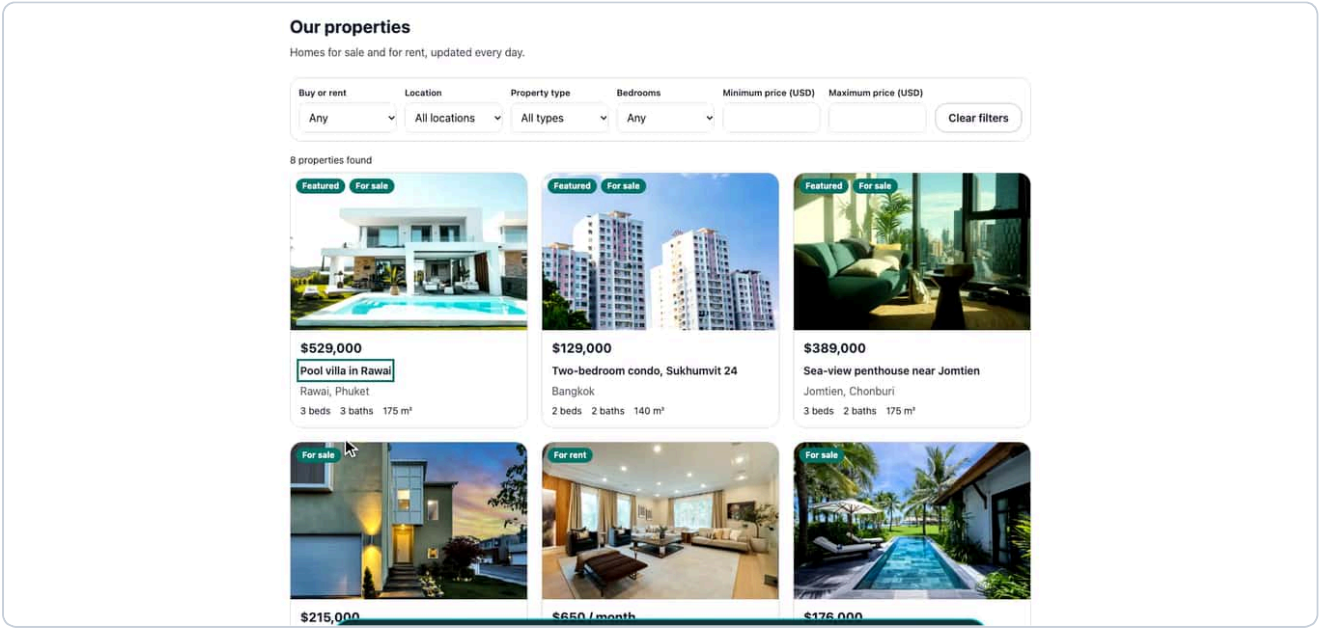


Figure 159.22 · Screen recorded 24 October 2026

RELATED HELP CENTER ARTICLES

What is a property website in the CRM? faq.housingmarketgroup.com/faq/what-is-a-property-website-in-the-crm

160 CHAPTER 160

Limit a widget to your own website

Pro and Business | For agents who want their properties on their own website | Watch the video

OVERVIEW

The websites you add under Websites in the widget settings and prove are yours. Until you add one, any website carrying your snippet can show it.

Once you have added at least one website, your widget is shown only on the websites you added. Until then, any website that carries your snippet can show it, so add your website before you paste the snippet.

- In Housing Market CRM, open Website Widgets and open your widget.
- Open the Websites tab and add the address of your website.
- Prove that it is yours in one of three ways: add a DNS TXT record, add a meta tag to your home page, or put a file on your website. The CRM shows the exact value to use.

The Free plan covers one website, Pro covers several, and Business has no limit. The website crawl importer (beta) reads listings only from a website you have proved is yours.

From the Help Center: **Which websites can show my Website Widget?**

STEP BY STEP

1 This is your **Housing Market CRM** dashboard.

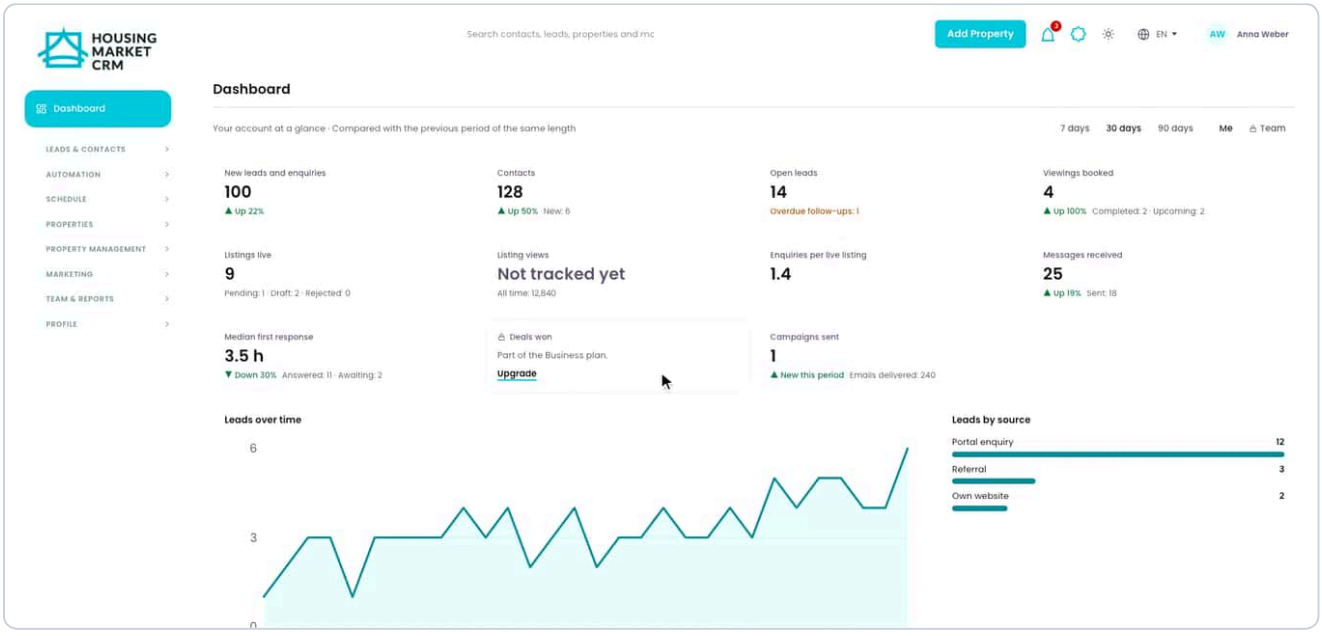


Figure 160.1 · Screen recorded 24 October 2026

2 Open **Properties** in the left menu.

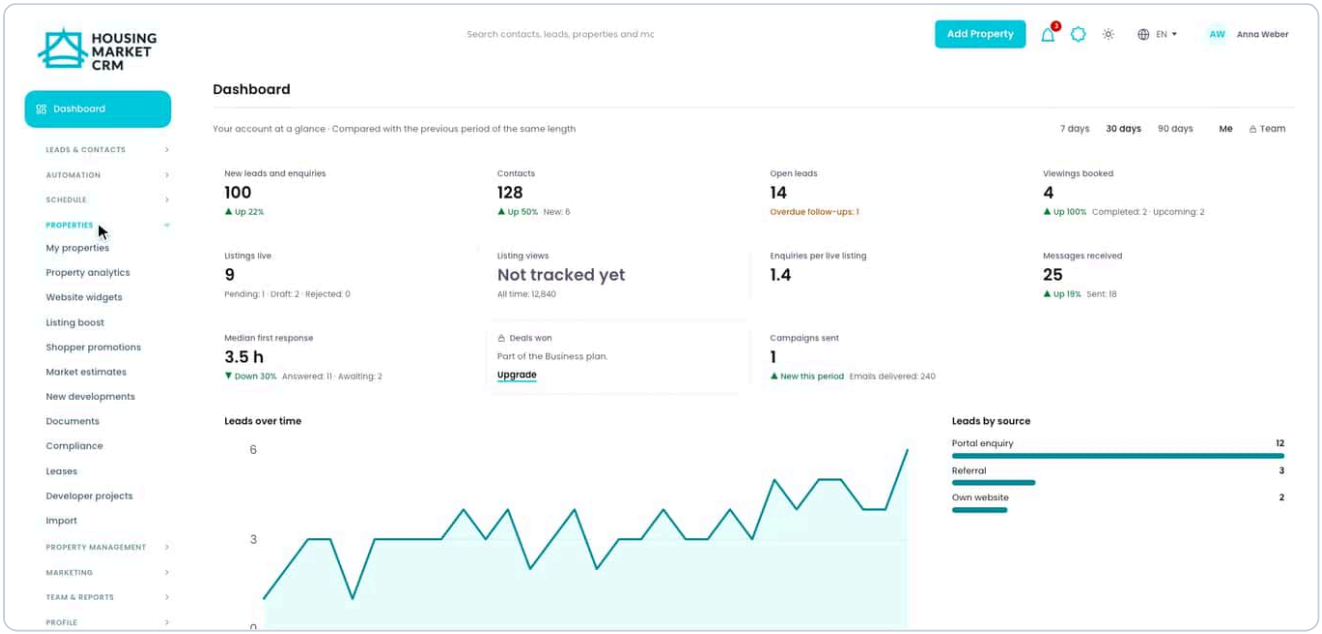


Figure 160.2 · Screen recorded 24 October 2026

3 Click **Website widgets**.

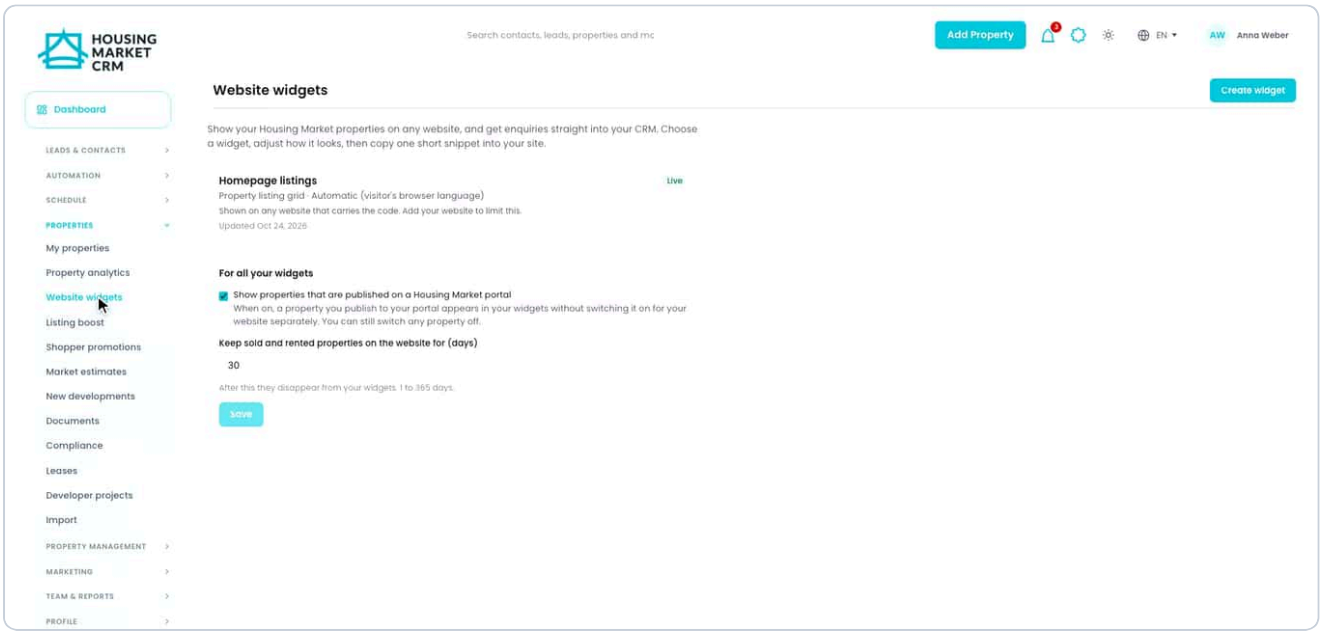


Figure 160.3 · Screen recorded 24 October 2026

4 Open **Homepage listings**.

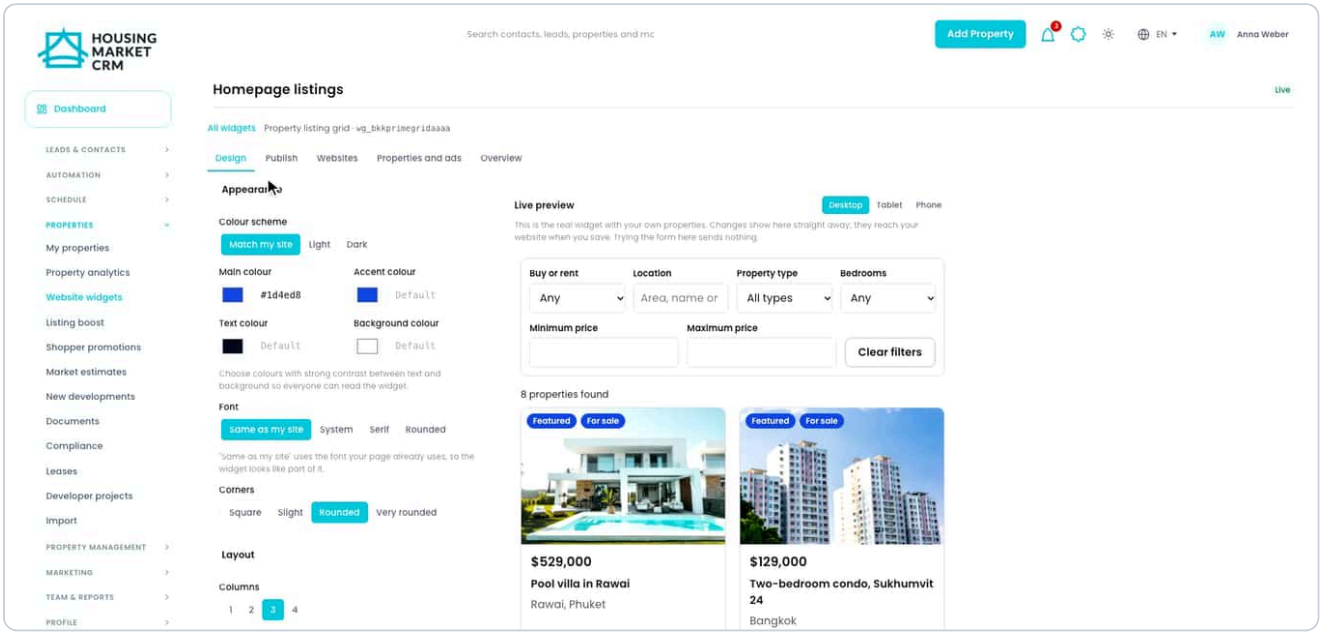


Figure 160.4 · Screen recorded 24 October 2026

5 Open the **Websites** tab.

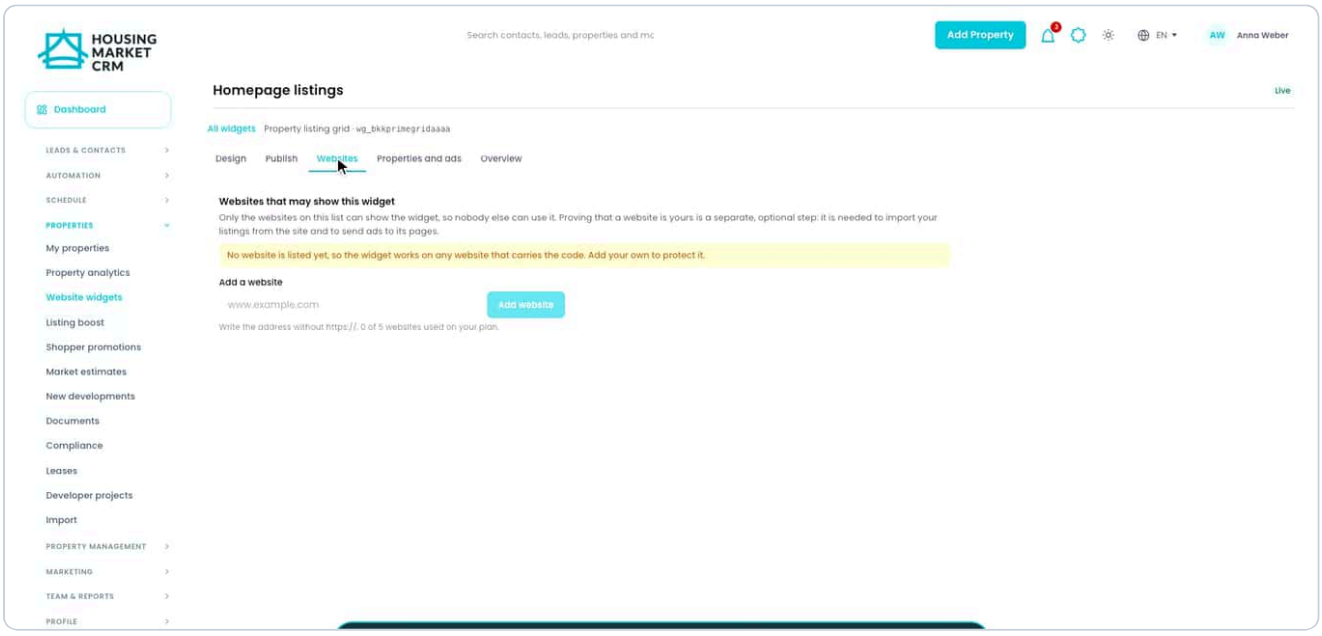


Figure 160.5 · Screen recorded 24 October 2026

6 With **no website listed**, the widget works on **any website** that carries the code.

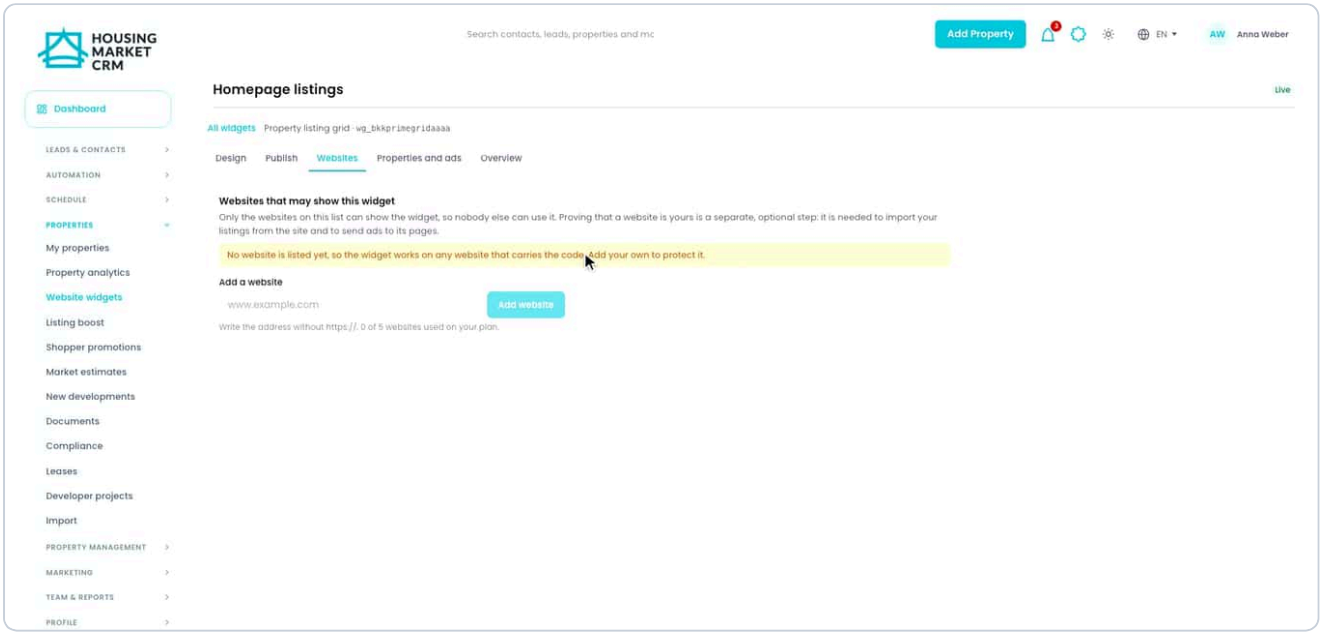


Figure 160.6 · Screen recorded 24 October 2026

7 Add **your own website**, without https://.

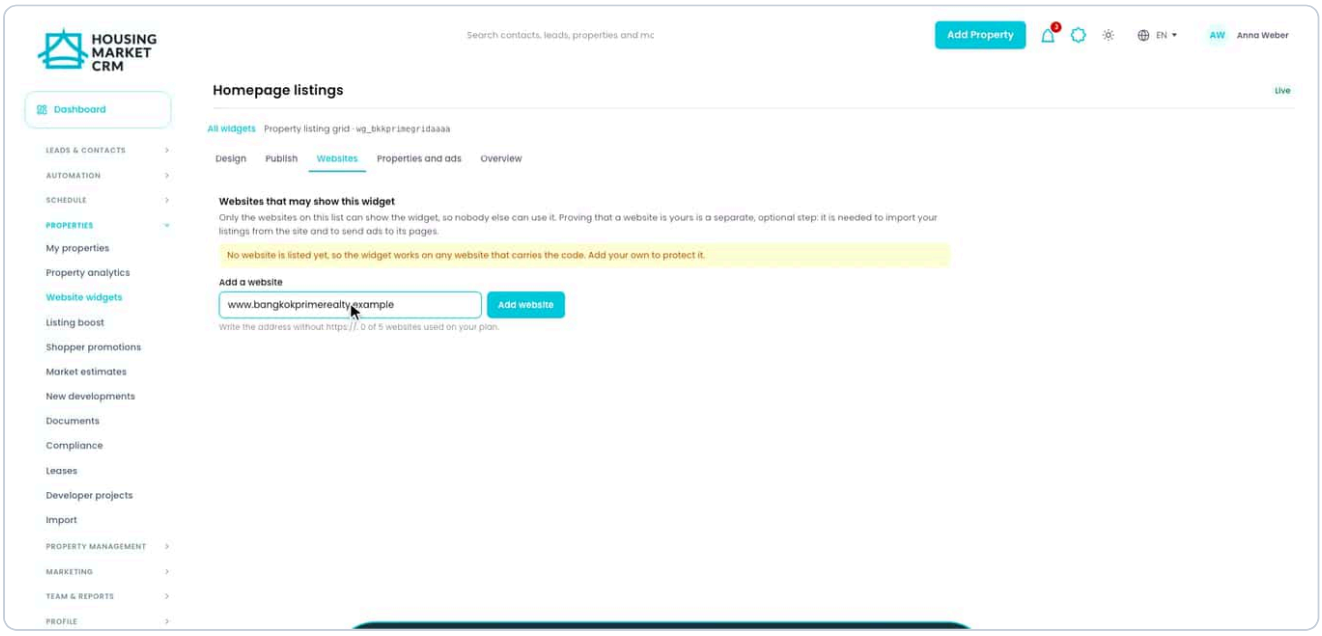


Figure 160.7 · Screen recorded 24 October 2026

8 Your **plan** says how many websites one widget may list.

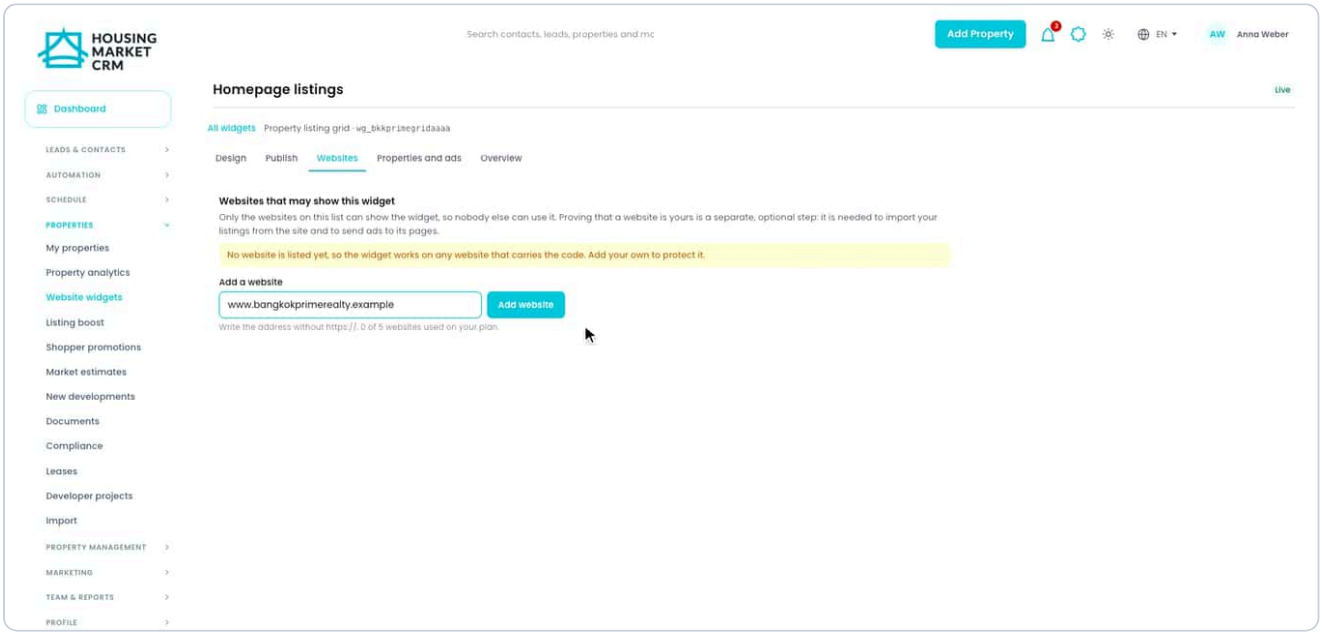


Figure 160.8 · Screen recorded 24 October 2026

9 Click **Add website**.

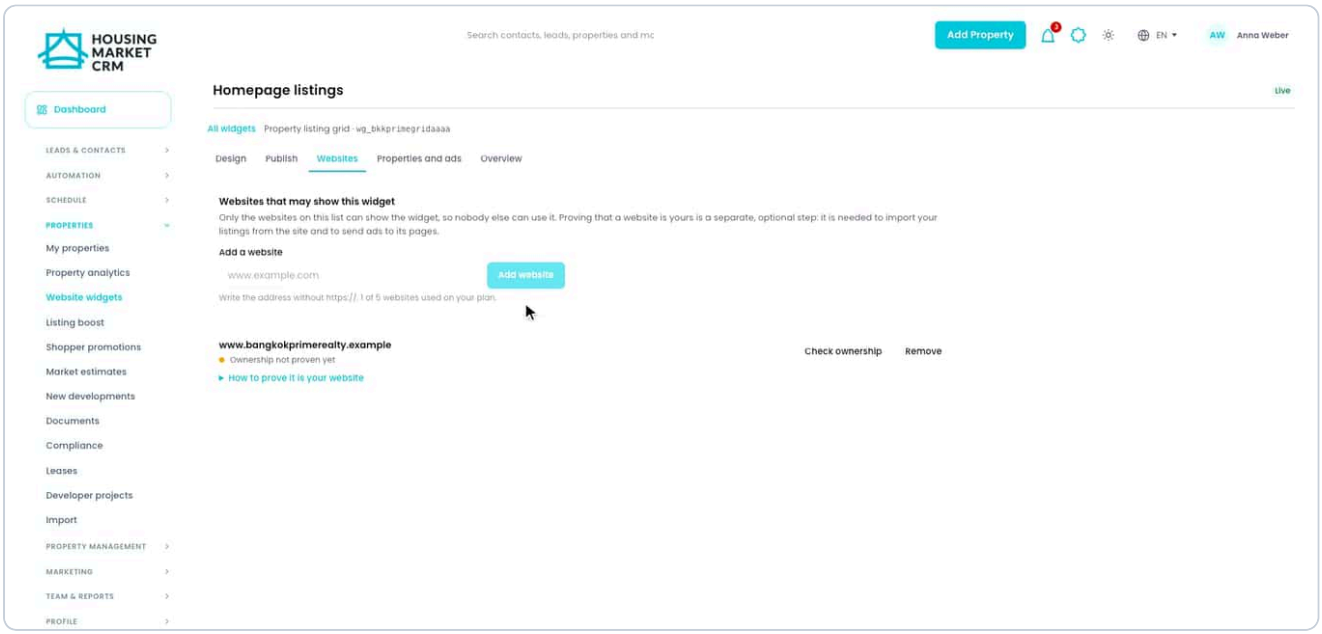


Figure 160.9 · Screen recorded 24 October 2026

10 Now **only this website** can show the widget.

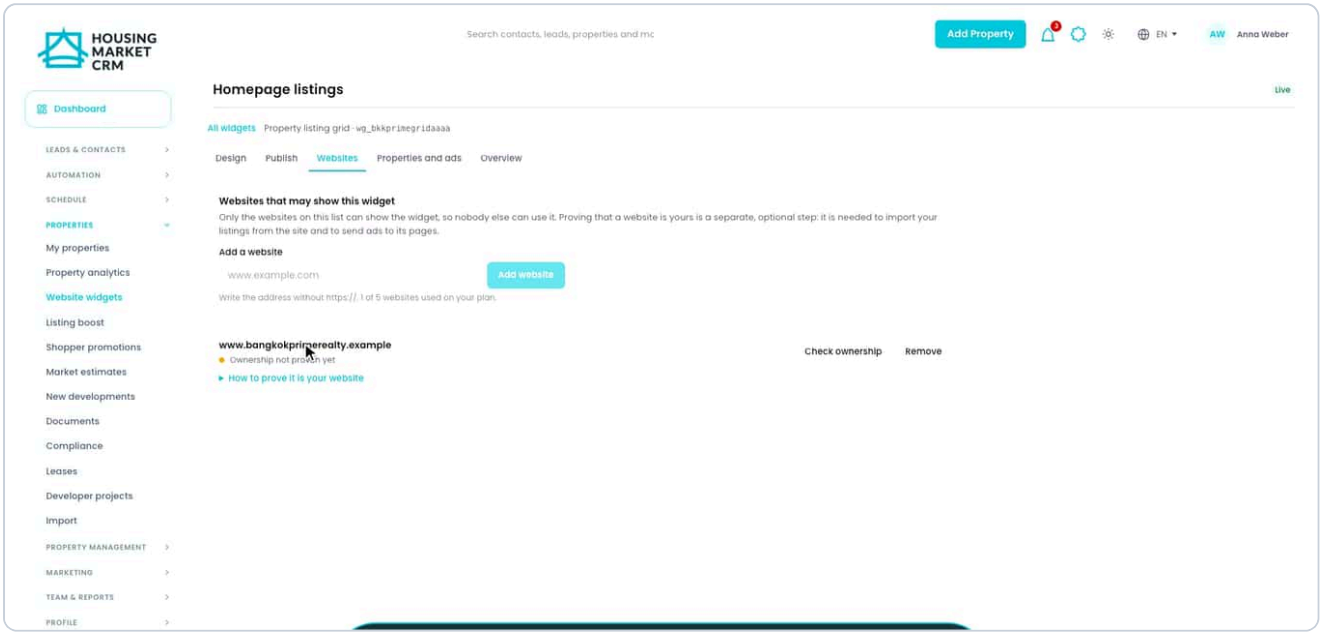


Figure 160.10 · Screen recorded 24 October 2026

11 Proving that the website is **yours** is a separate, optional step.

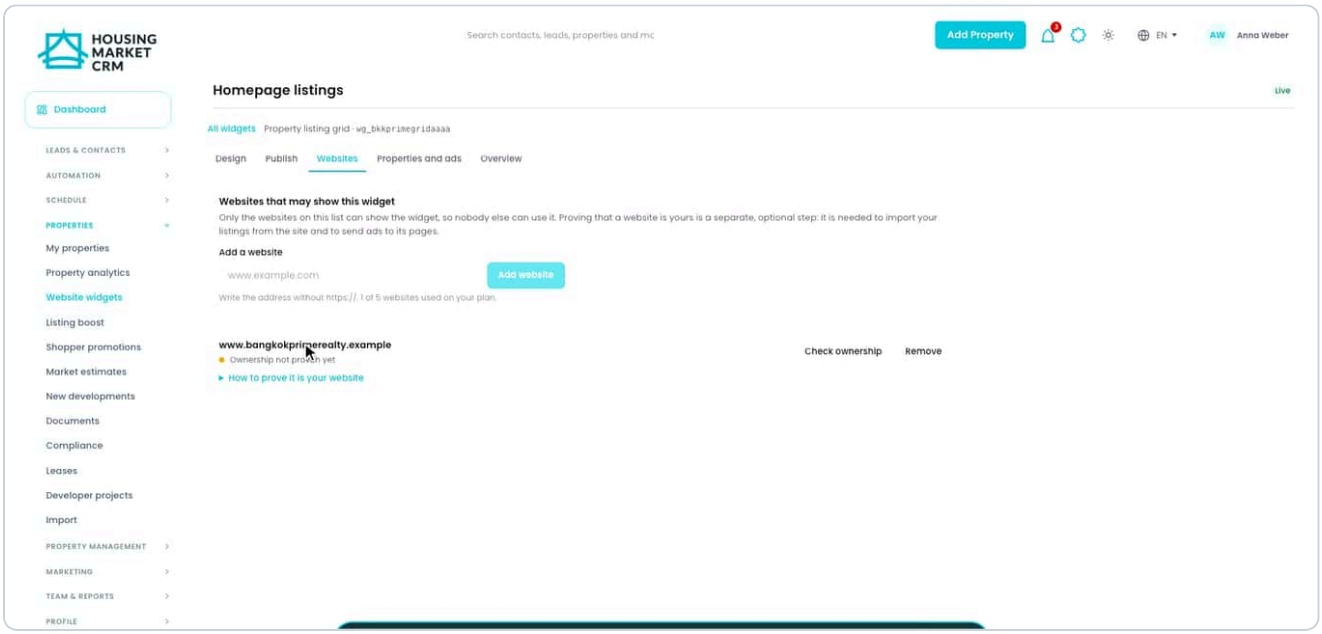


Figure 160.11 · Screen recorded 24 October 2026

12 It is needed to **import your listings** from the website and to **send ads** to its pages.

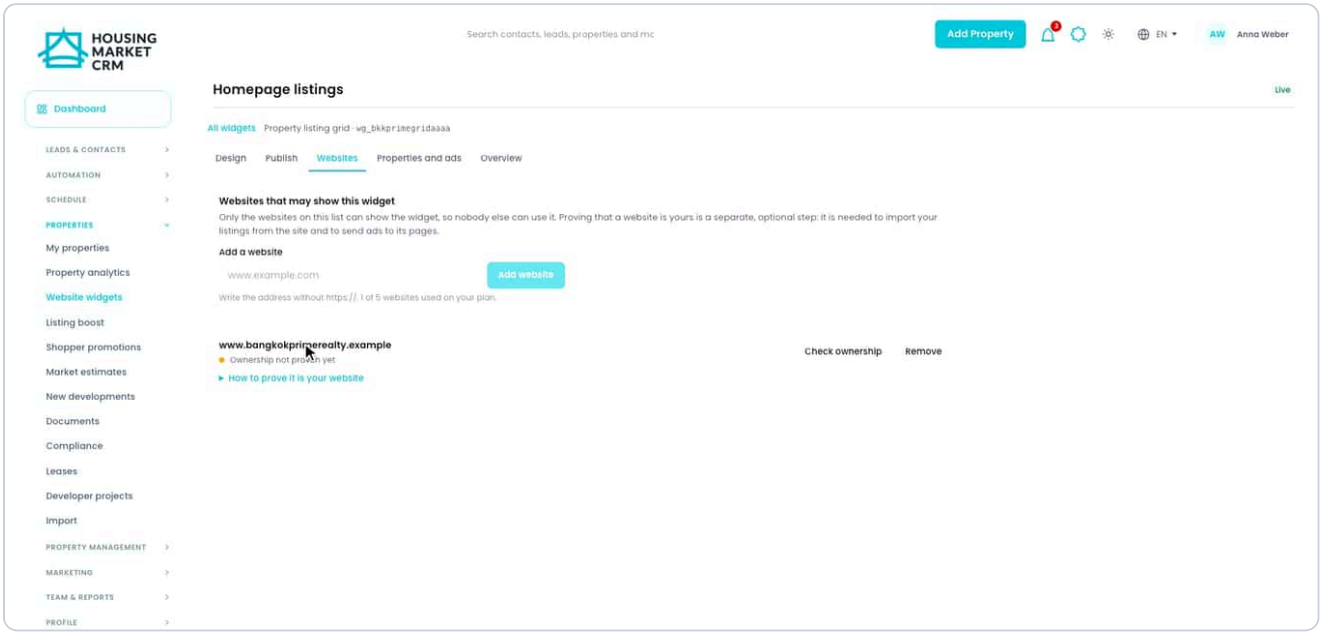


Figure 160.12 · Screen recorded 24 October 2026

13 Open **How to prove it is your website**.

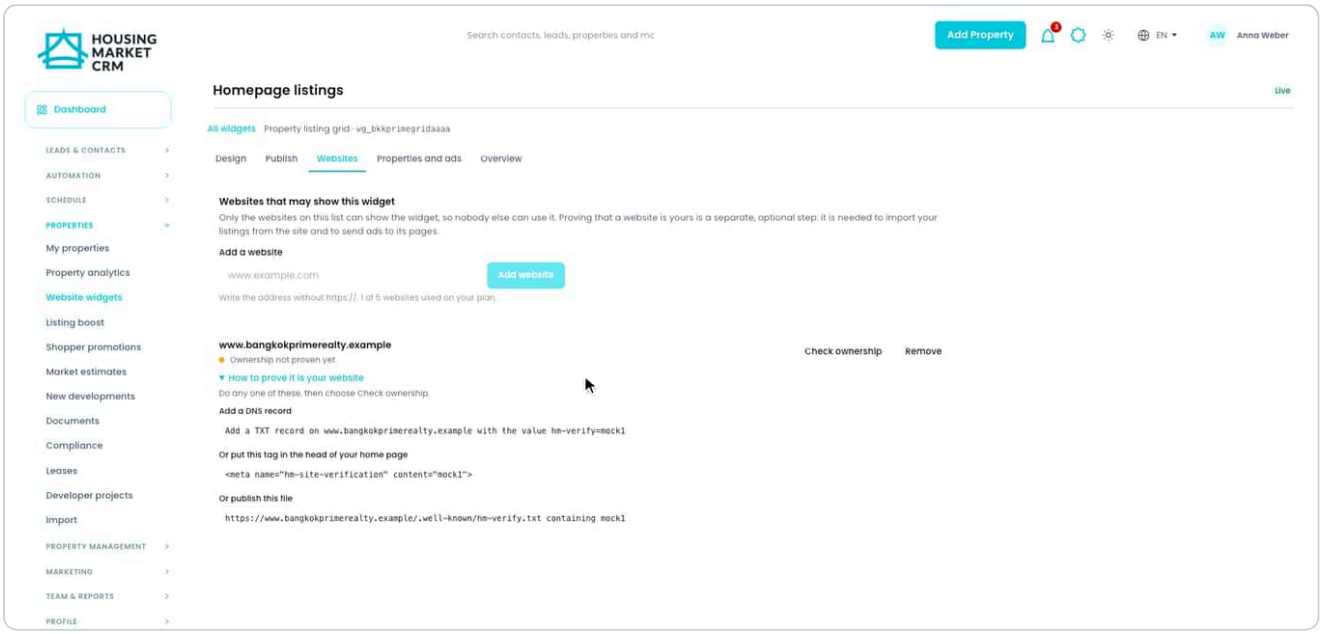


Figure 160.13 · Screen recorded 24 October 2026

14 Add a **DNS record** or put this **tag** in the head of your home page.

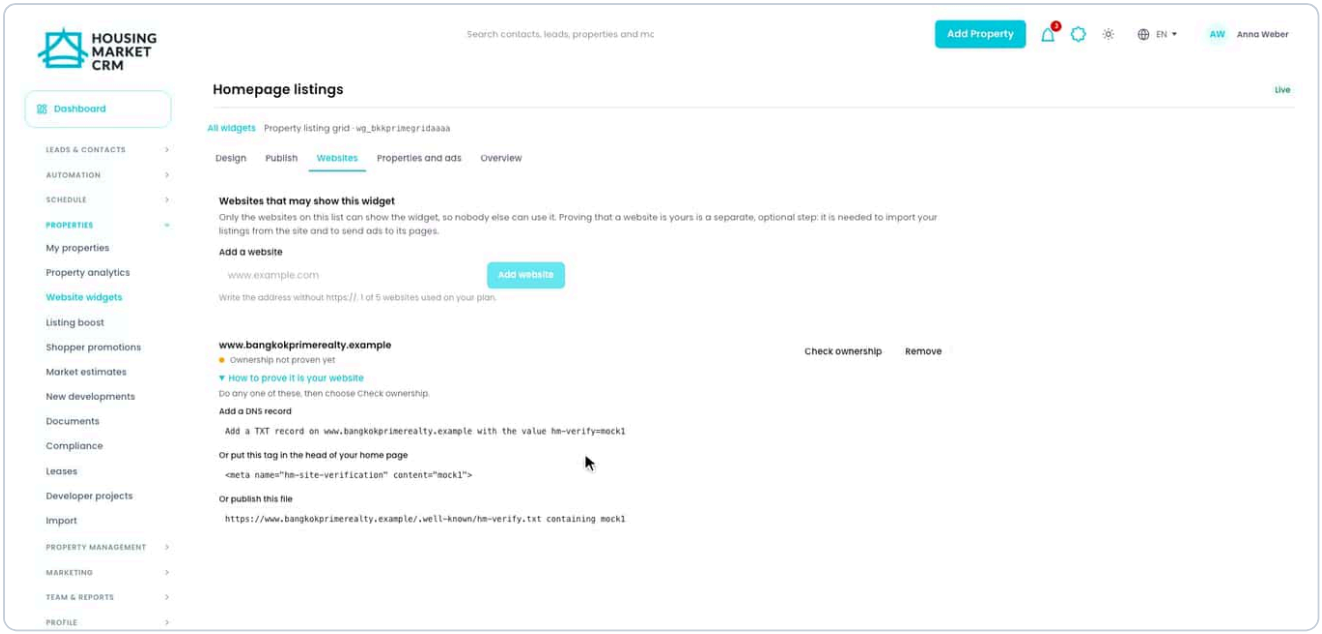


Figure 160.14 · Screen recorded 24 October 2026

15 or publish this **file**. Any **one** of them is enough.

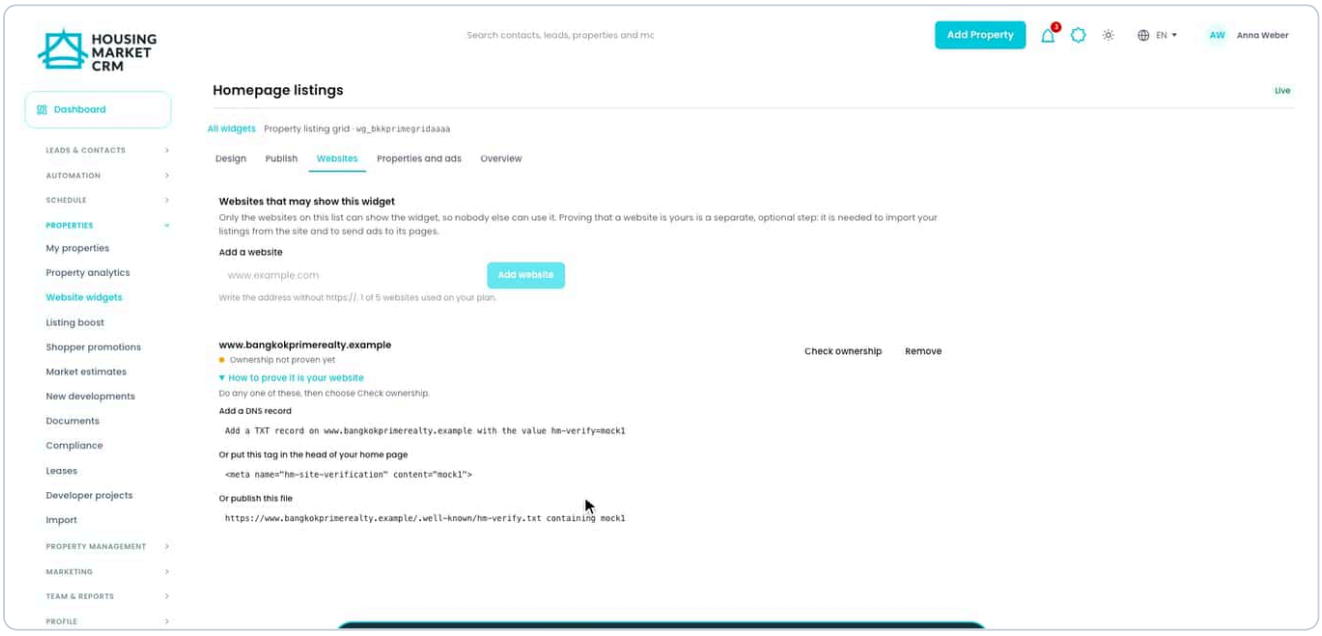


Figure 160.15 · Screen recorded 24 October 2026

16 Before the proof is in place, **Check ownership** says it cannot find it.

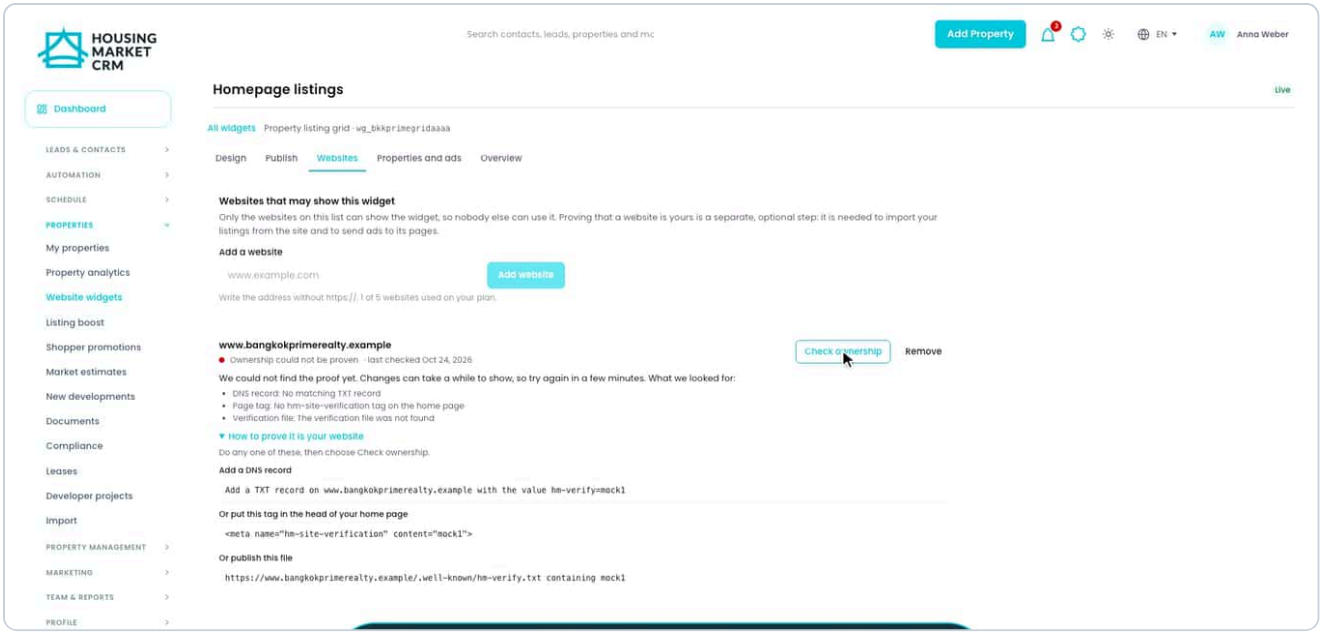


Figure 160.16 · Screen recorded 24 October 2026

17 Changes can take a while to show: **try again in a few minutes**.

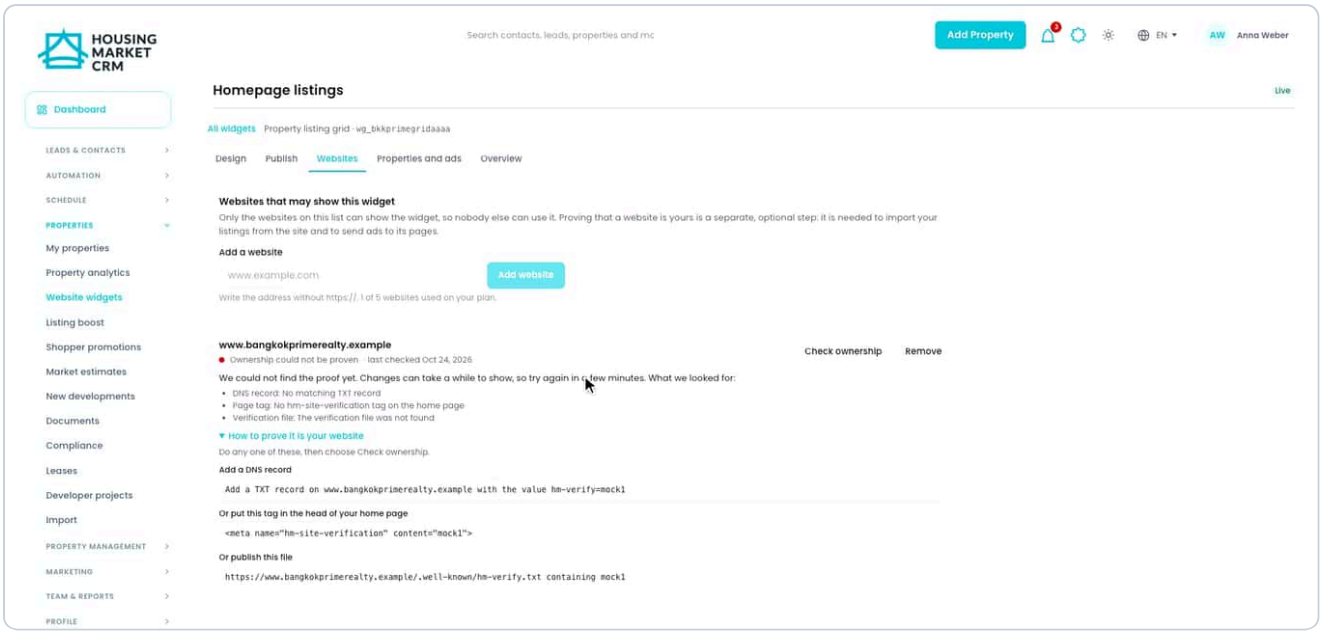


Figure 160.17 · Screen recorded 24 October 2026

18 Once your **record, tag or file** is live, check again.

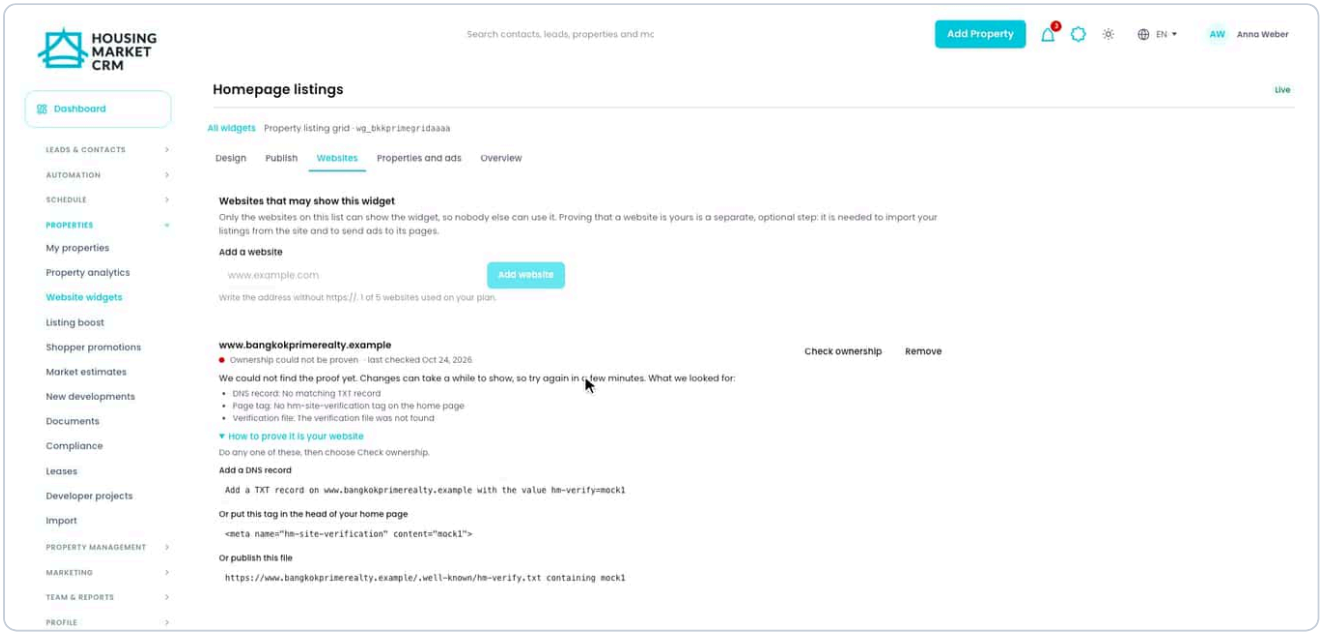


Figure 160.18 · Screen recorded 24 October 2026

19 Click **Check ownership**.

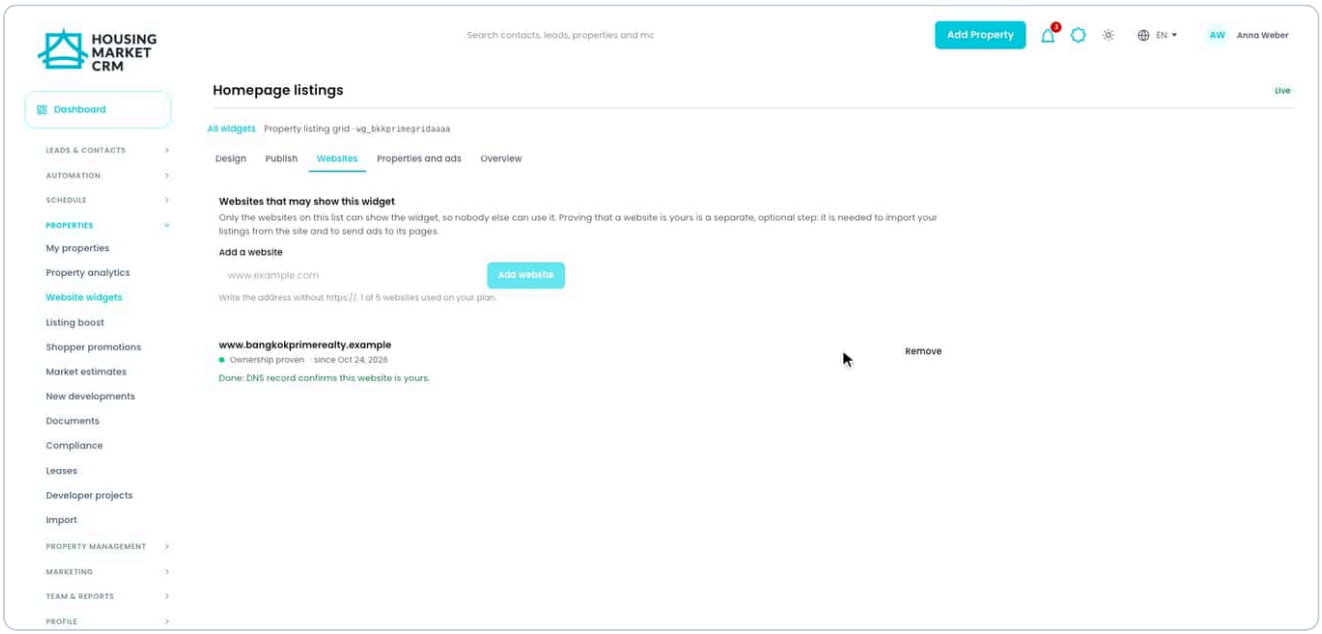


Figure 160.19 · Screen recorded 24 October 2026

20 Done: the website is **proven to be yours**.

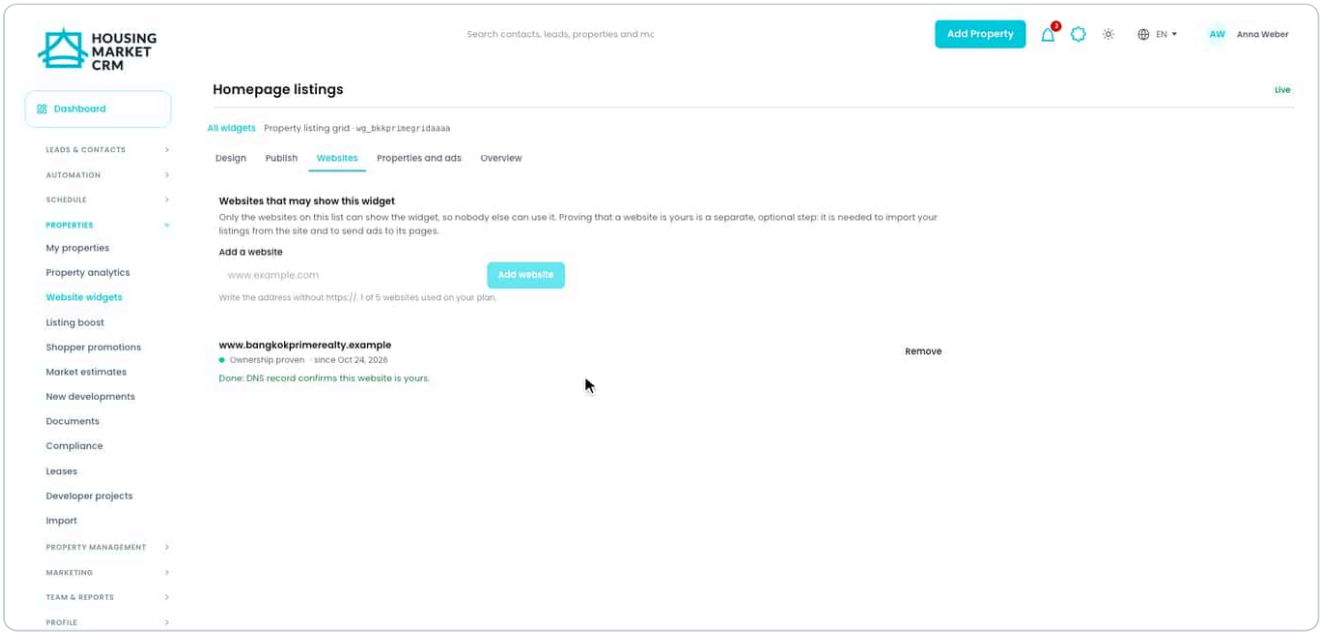


Figure 160.20 · Screen recorded 24 October 2026

21 The list shows **Ownership proven** and the date.

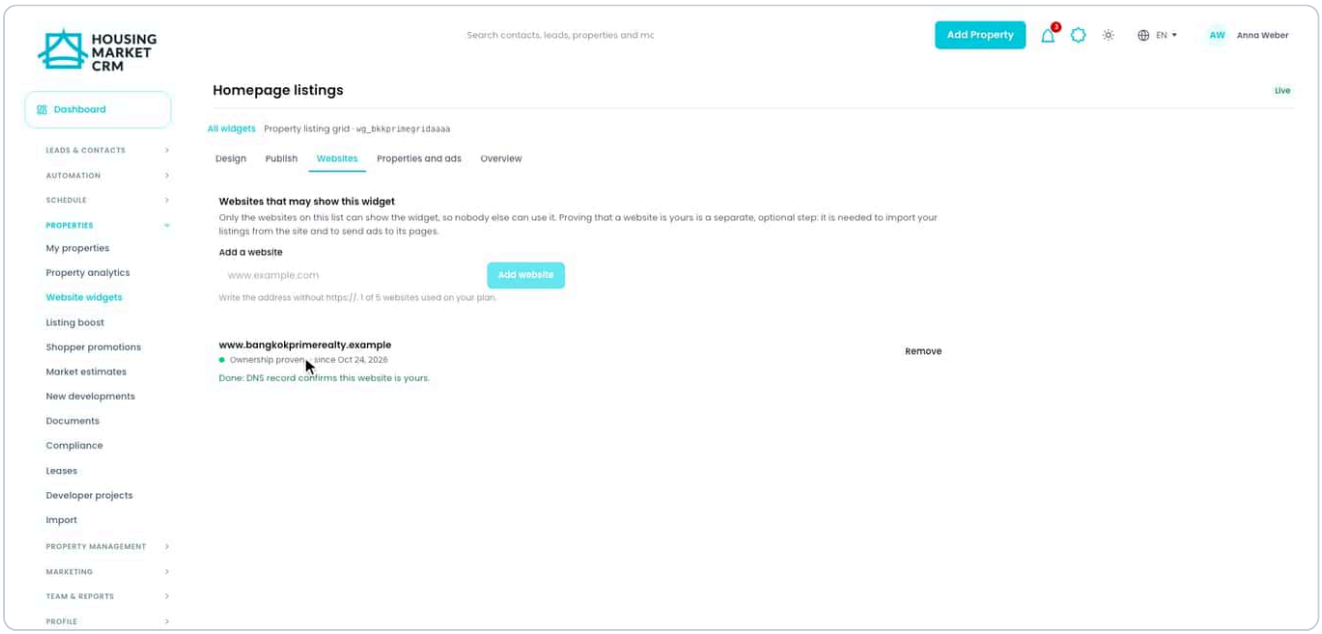


Figure 160.21 · Screen recorded 24 October 2026

22 The widget now shows **only on your website**.

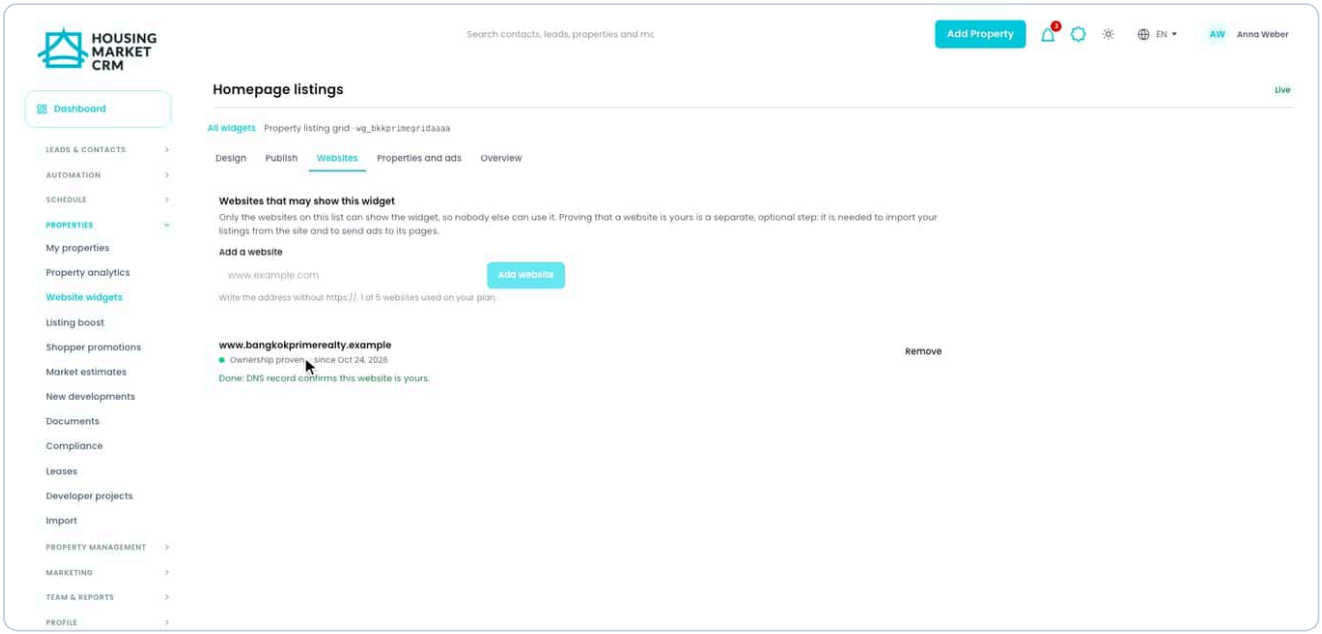


Figure 160.22 · Screen recorded 24 October 2026

RELATED HELP CENTER ARTICLES

What is a property website in the CRM?	faq.housingmarketgroup.com/faq/what-is-a-property-website-in-the-crm

161 CHAPTER 161

Show or hide a property on your website

Pro and Business | For agents who want their properties on their own website | Watch the video

OVERVIEW

Six: a listings grid, a search bar, a featured strip, a property card, an enquiry form and an agent card.

- Listings grid: your properties as a grid on any page.
- Search bar: lets a visitor choose what they want and either filters a grid on the same page or sends them to your listings page with their choices applied.
- Featured strip: a carousel of the properties you want to stand out (Pro and above).
- Property card: one property in full.
- Enquiry form: sends each enquiry to your CRM as a lead.
- Agent card: a card with your details as an agent.

In Website Widgets you choose the colours, the layout and the font. By default the widget uses your website's own font. A property opens in a window over the page, which has a link you can share and which the browser's Back button closes, or on the Housing Market portal, as you choose.

A widget shows the properties you have switched on for your website. In My Properties, open a property and tick Show on my website under On your website. Properties that are published on a portal show automatically. The address stays hidden and the map pin rounded, unless you choose to show the exact location.

From the Help Center: **Which widgets can I show on my website?**

STEP BY STEP

1 This is your **Housing Market CRM** dashboard.

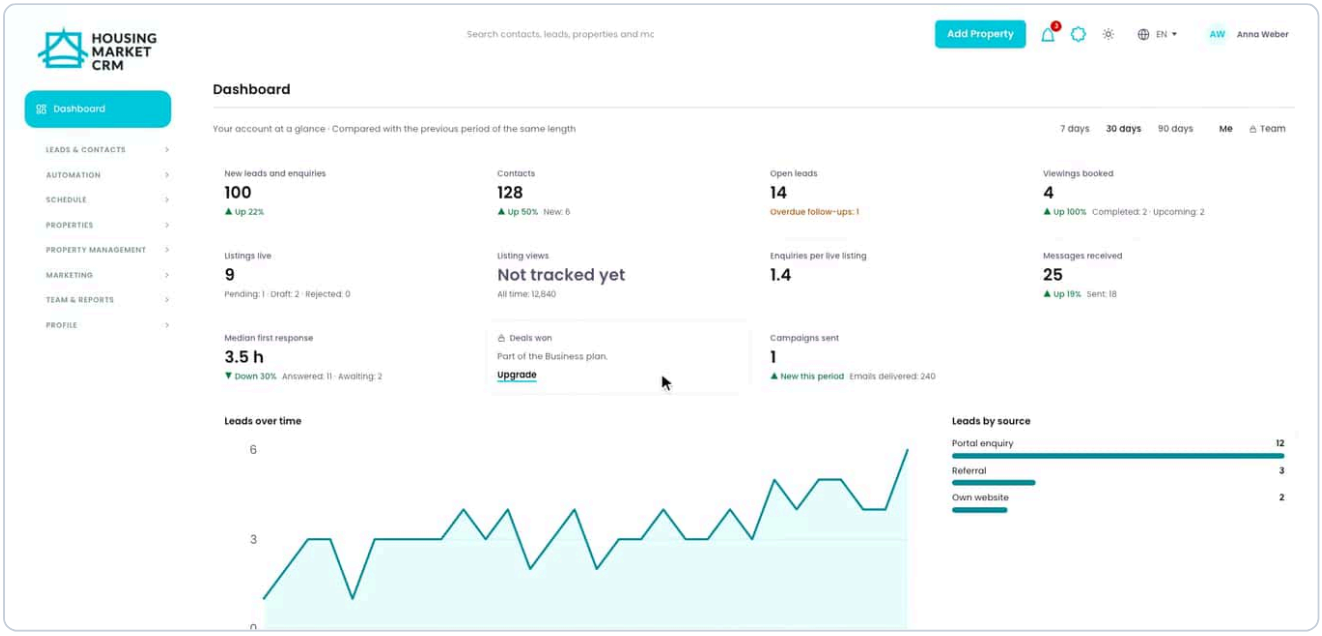


Figure 161.1 · Screen recorded 24 October 2026

2 Open **Properties** in the left menu.

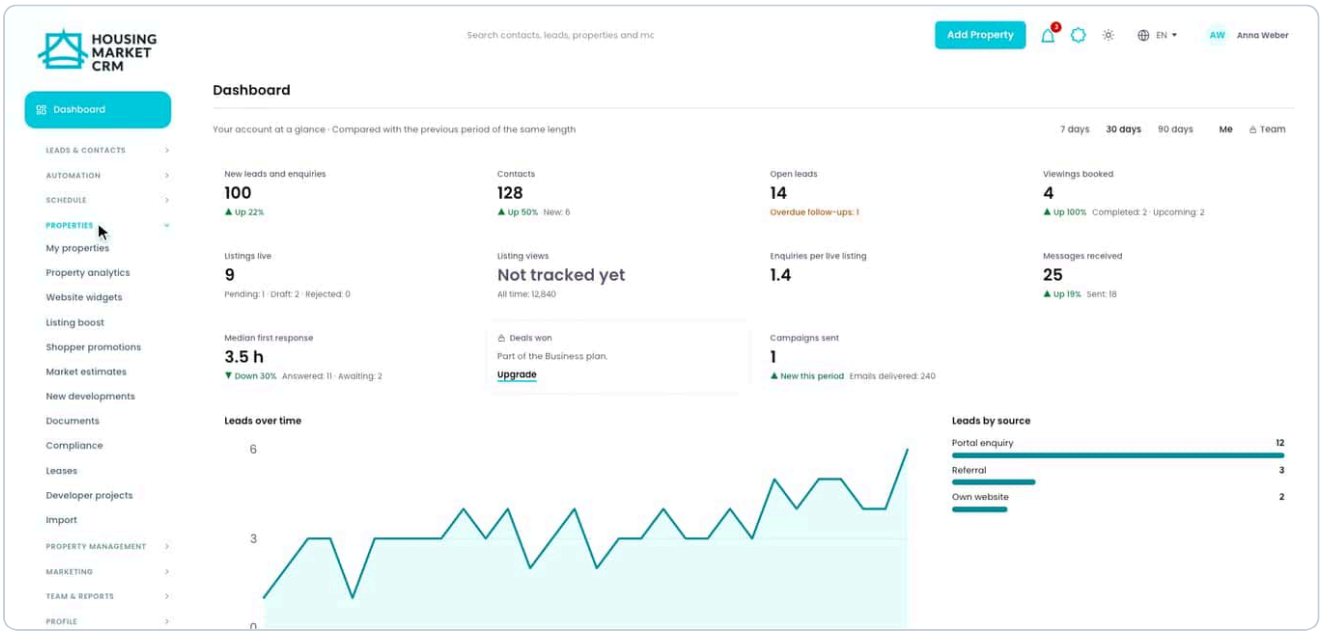


Figure 161.2 · Screen recorded 24 October 2026

3 Click **My properties.**

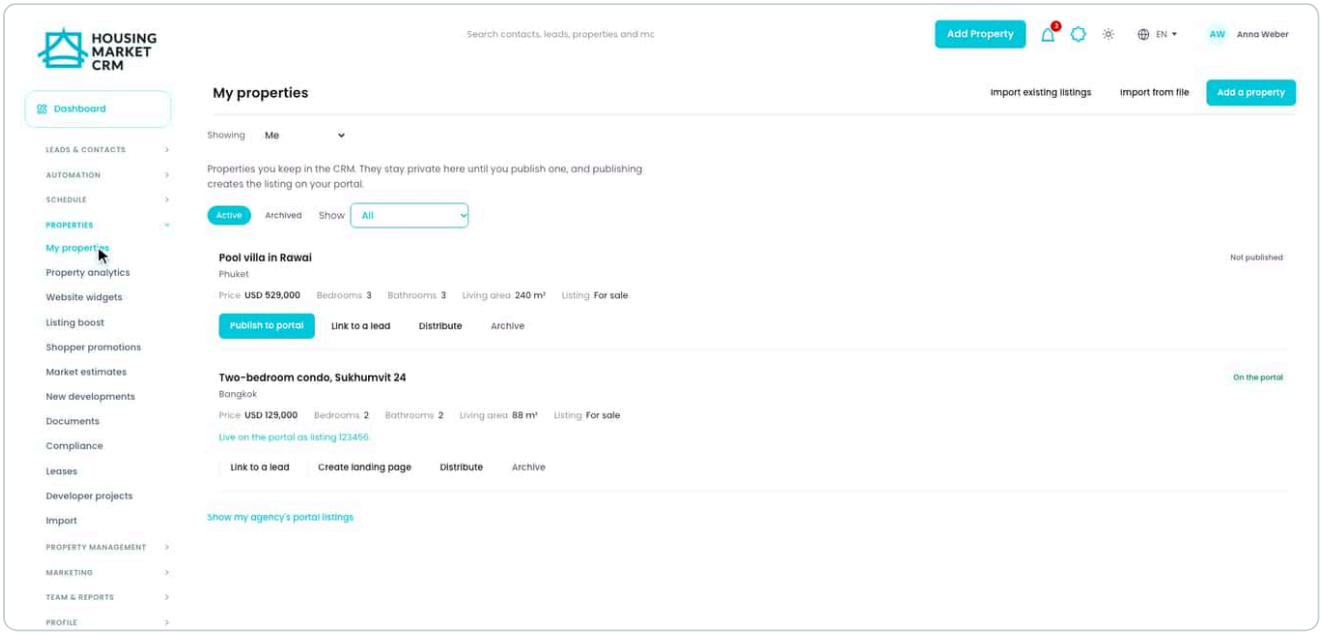


Figure 161.3 · Screen recorded 24 October 2026

4 Open a property.

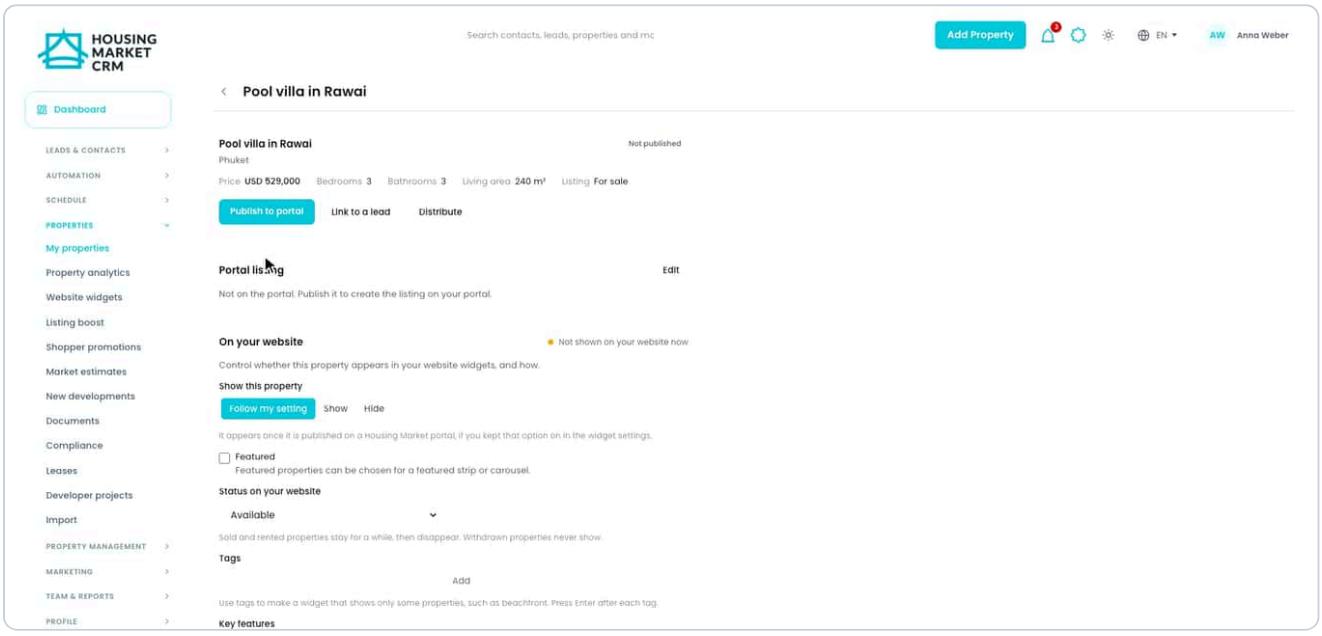


Figure 161.4 · Screen recorded 24 October 2026

5 Scroll to **On your website**.

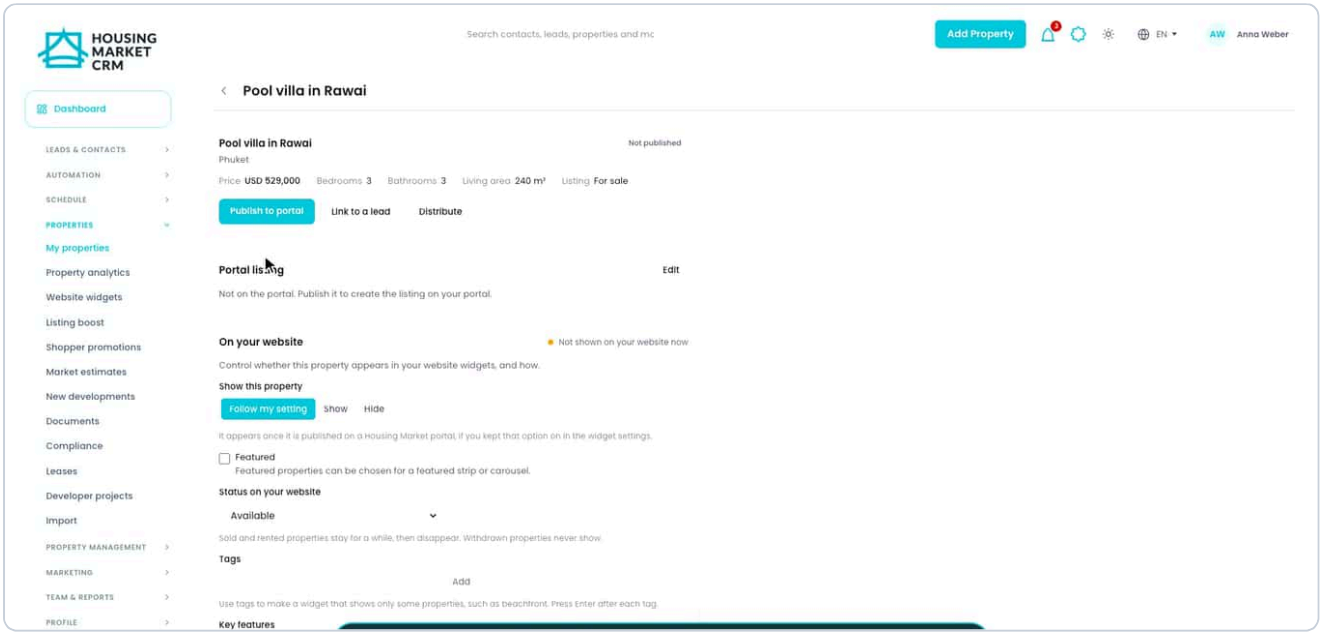


Figure 161.5 · Screen recorded 24 October 2026

6 Here you control whether this property appears in your **website widgets**, and how.

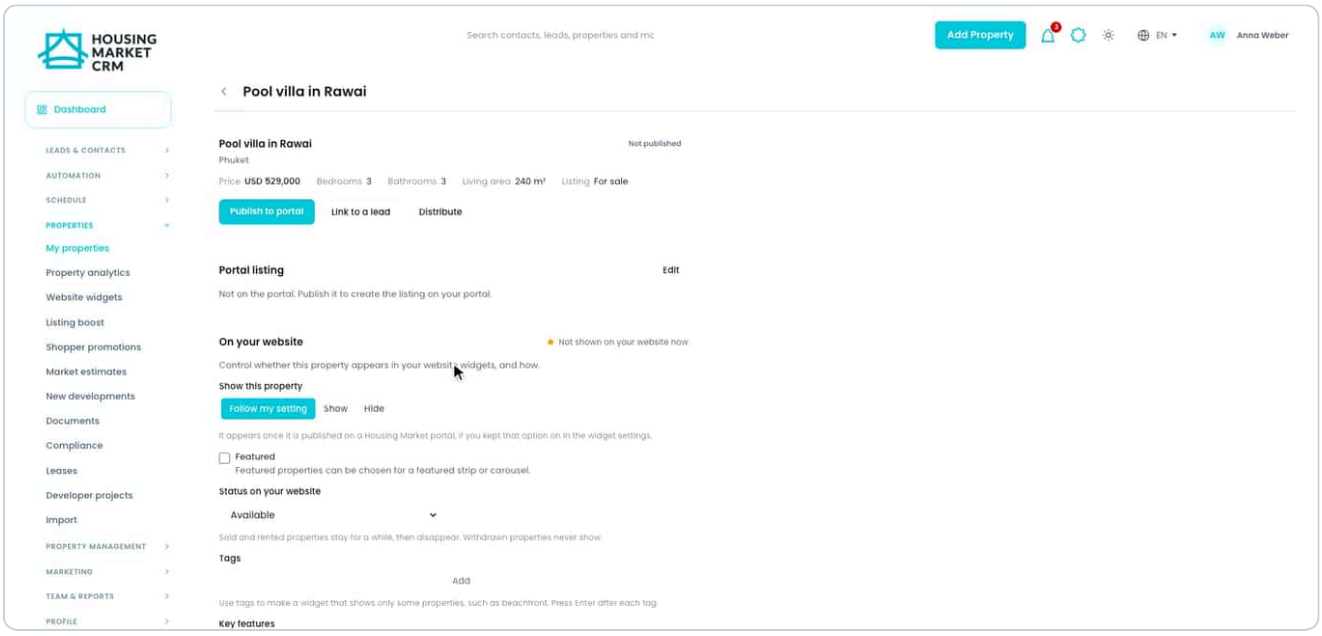


Figure 161.6 · Screen recorded 24 October 2026

7 The line at the top says what is true **right now**.

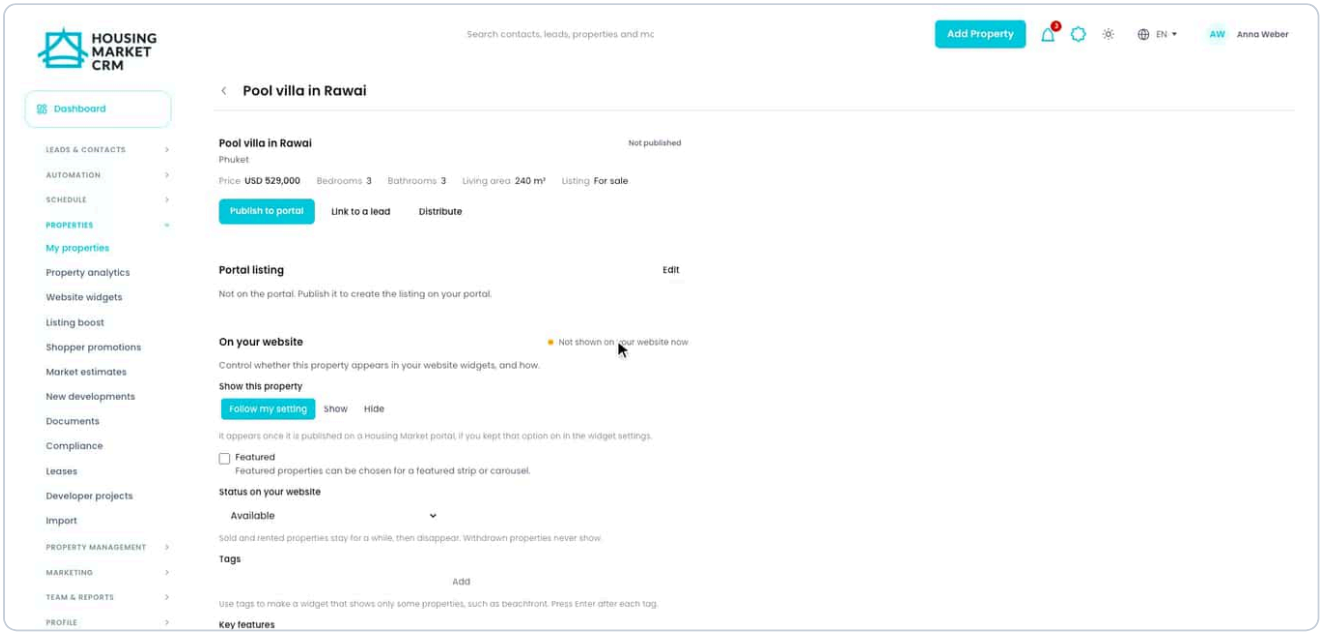


Figure 161.7 · Screen recorded 24 October 2026

8 **Follow my setting**, **Show** or **Hide**.

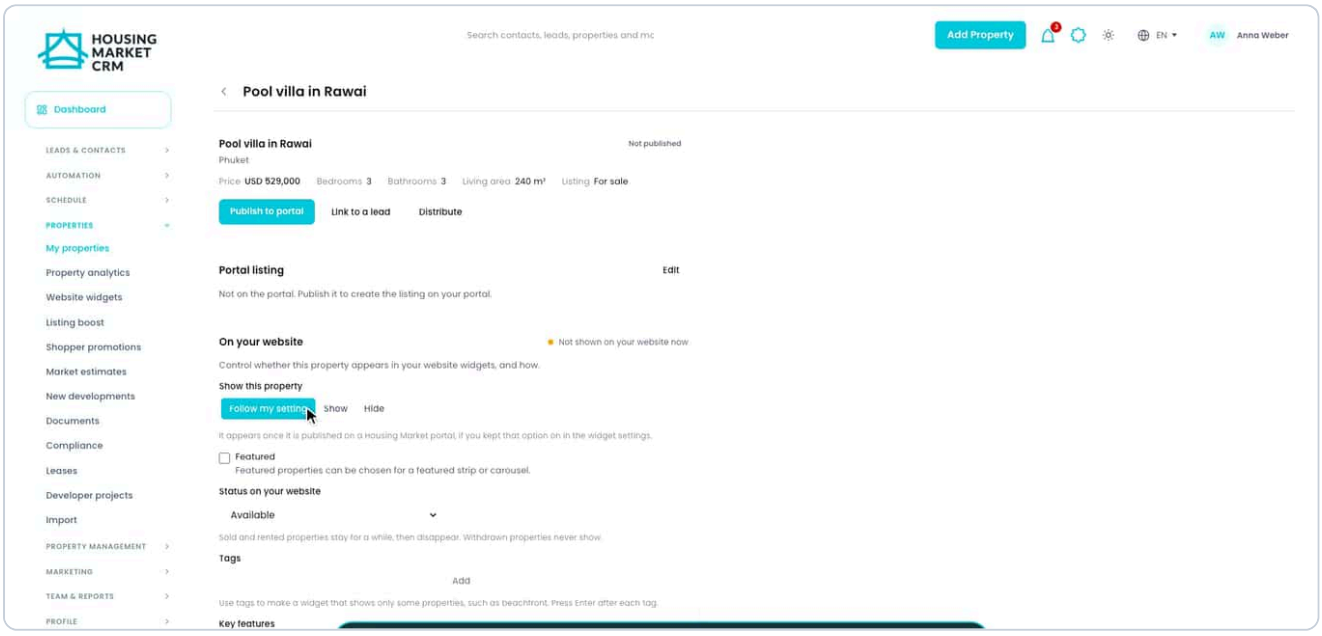


Figure 161.8 · Screen recorded 24 October 2026

9 Choose **Show**: it appears on your website even if it is not on a portal.

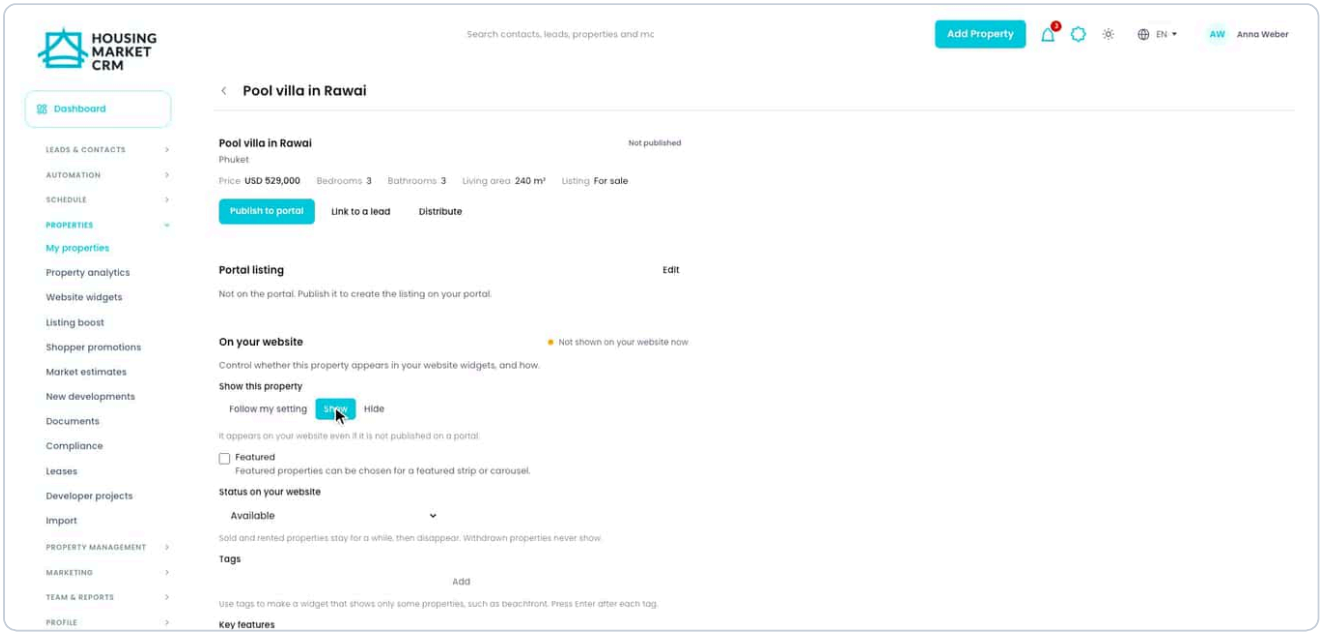


Figure 161.9 · Screen recorded 24 October 2026

10 Tick **Featured** to put it in a featured strip or carousel.

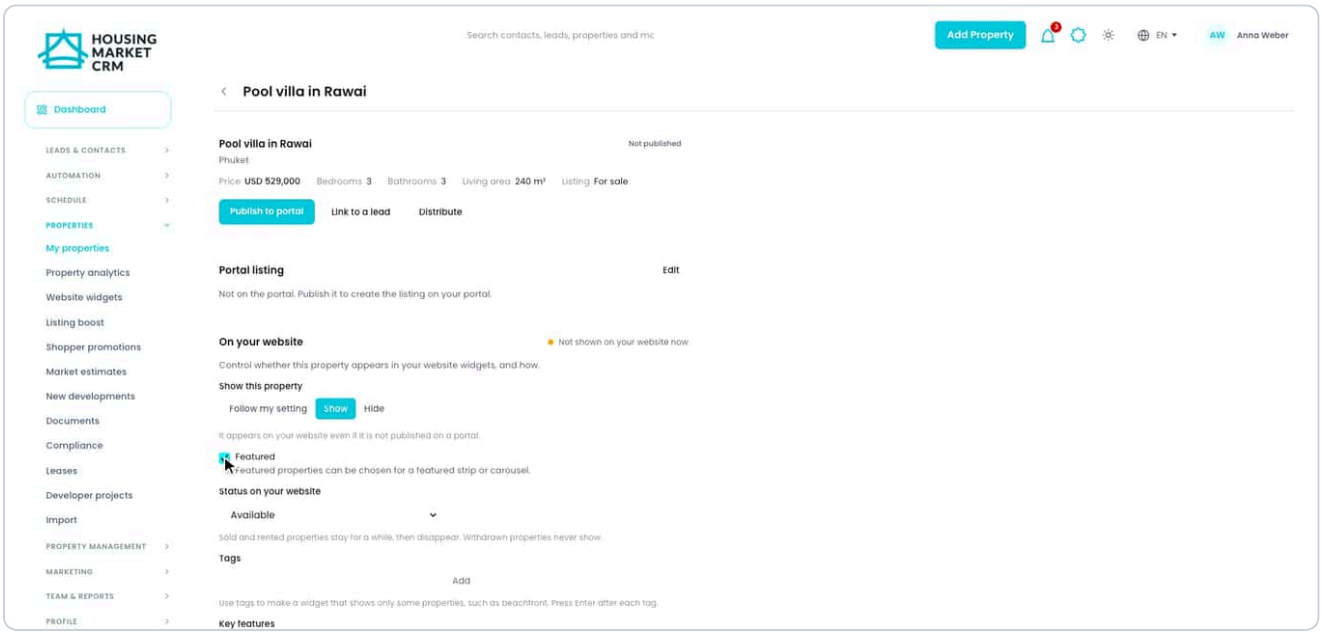


Figure 161.10 · Screen recorded 24 October 2026

11 Add a **tag**, for example *beachfront*. Press Enter.

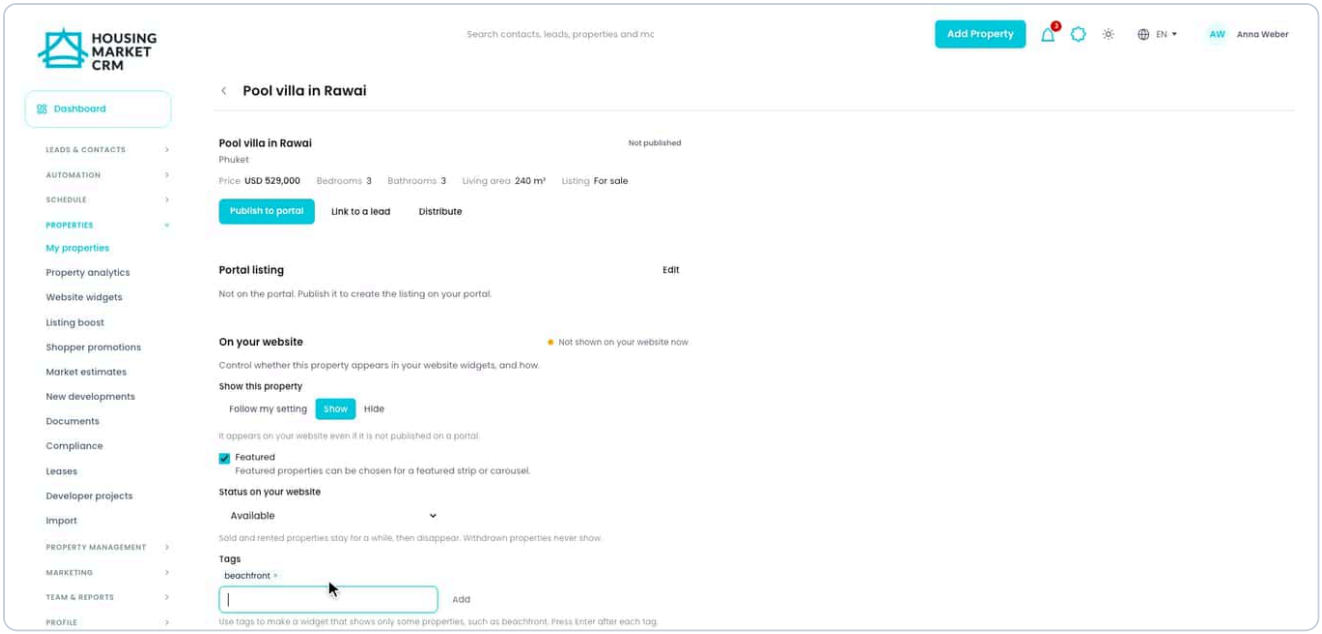


Figure 161.11 · Screen recorded 24 October 2026

12 A widget can show **only the properties with a tag**.

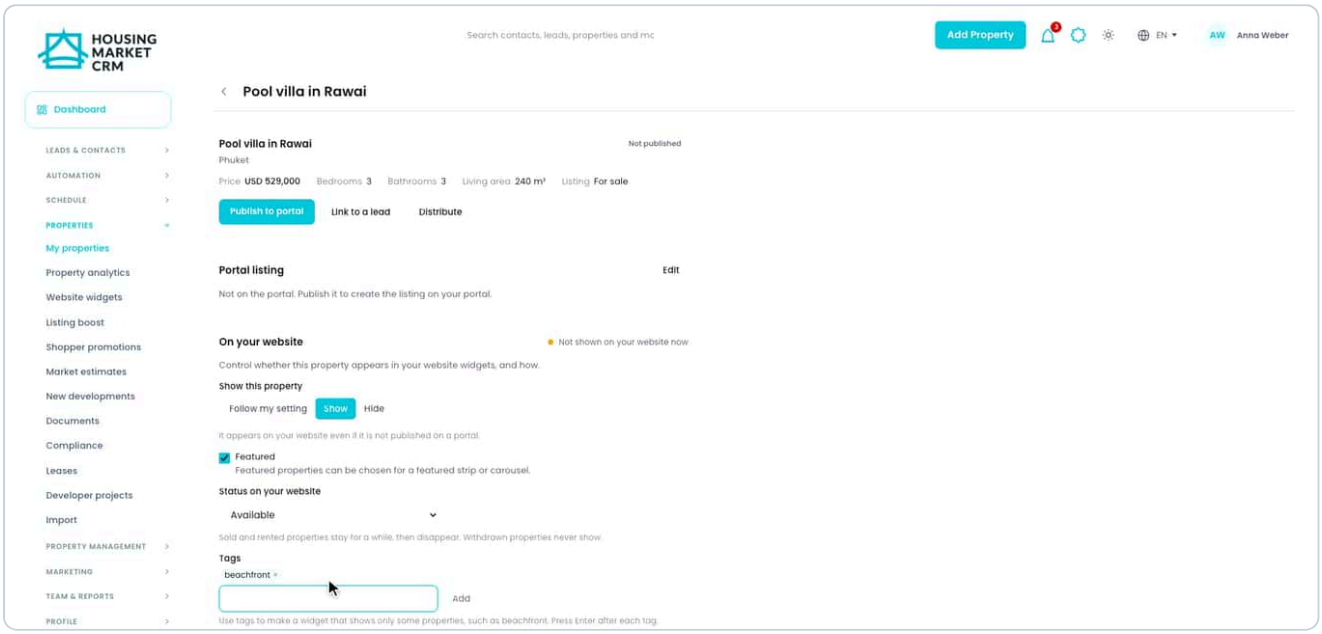


Figure 161.12 · Screen recorded 24 October 2026

13 Add **key features**, such as pool, parking or sea view.

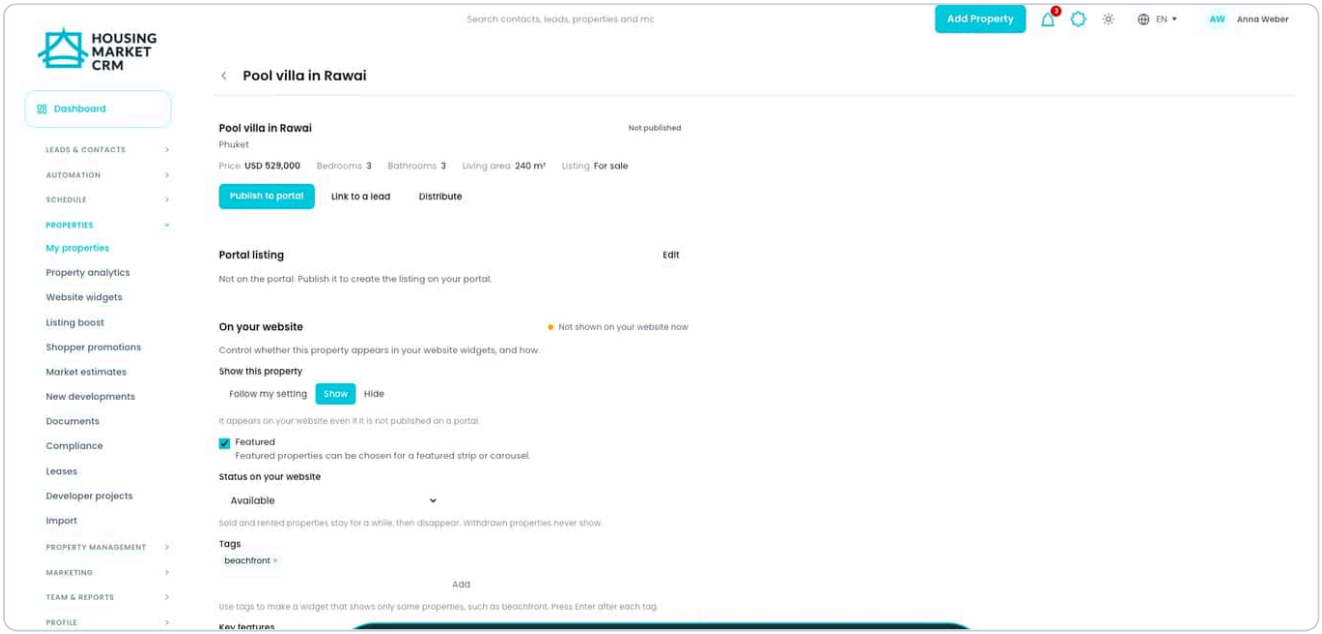


Figure 161.13 · Screen recorded 24 October 2026

14 Leave the **web address name** empty and one is made from the title.

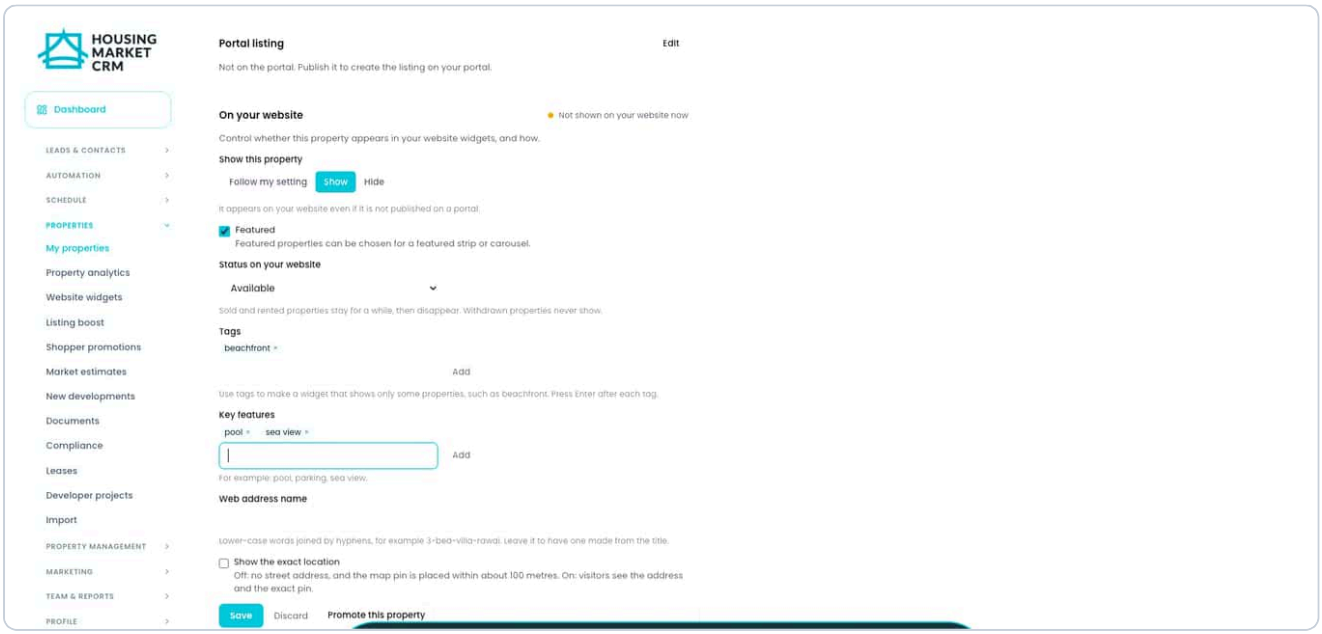


Figure 161.14 · Screen recorded 24 October 2026

15 **Show the exact location** is off: visitors see only the area.

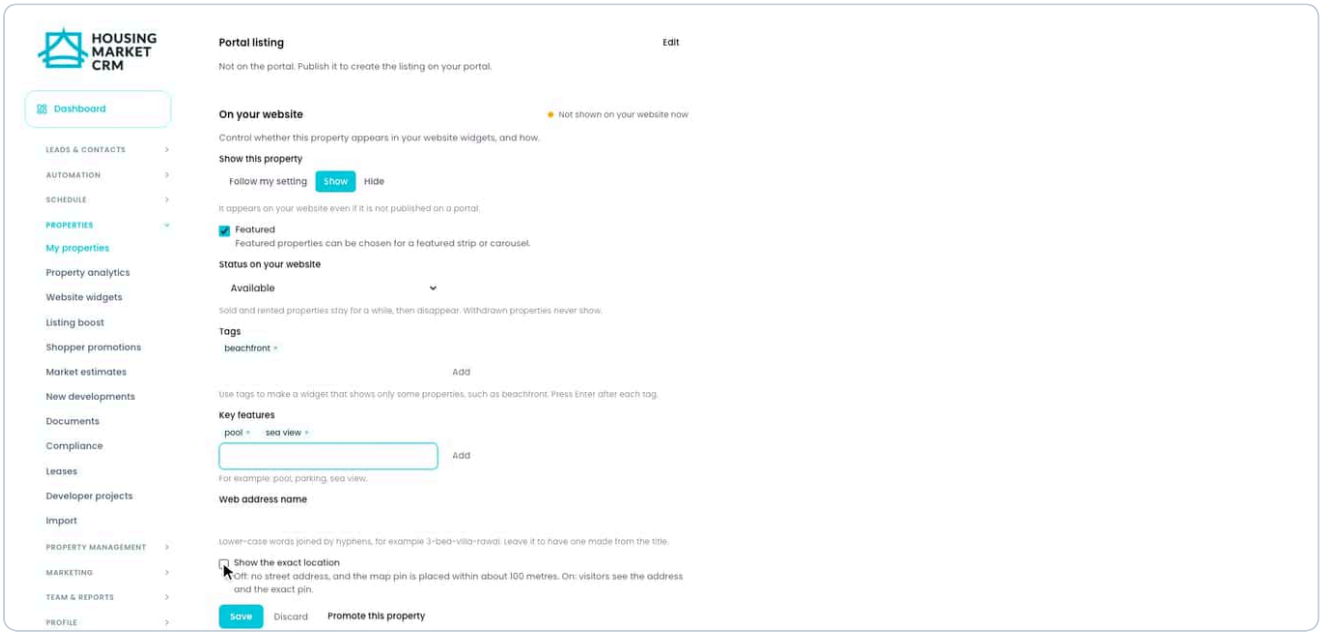


Figure 161.15 · Screen recorded 24 October 2026

16 Click **Save**.

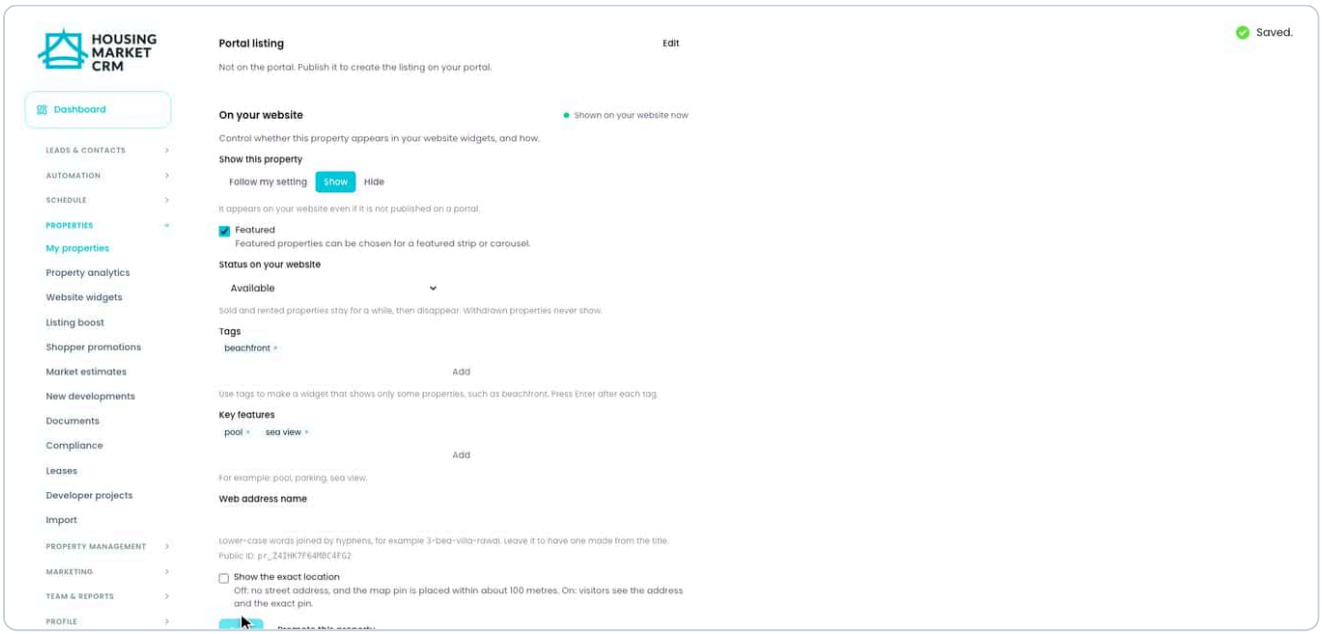


Figure 161.16 · Screen recorded 24 October 2026

17 The property is **shown on your website now**.

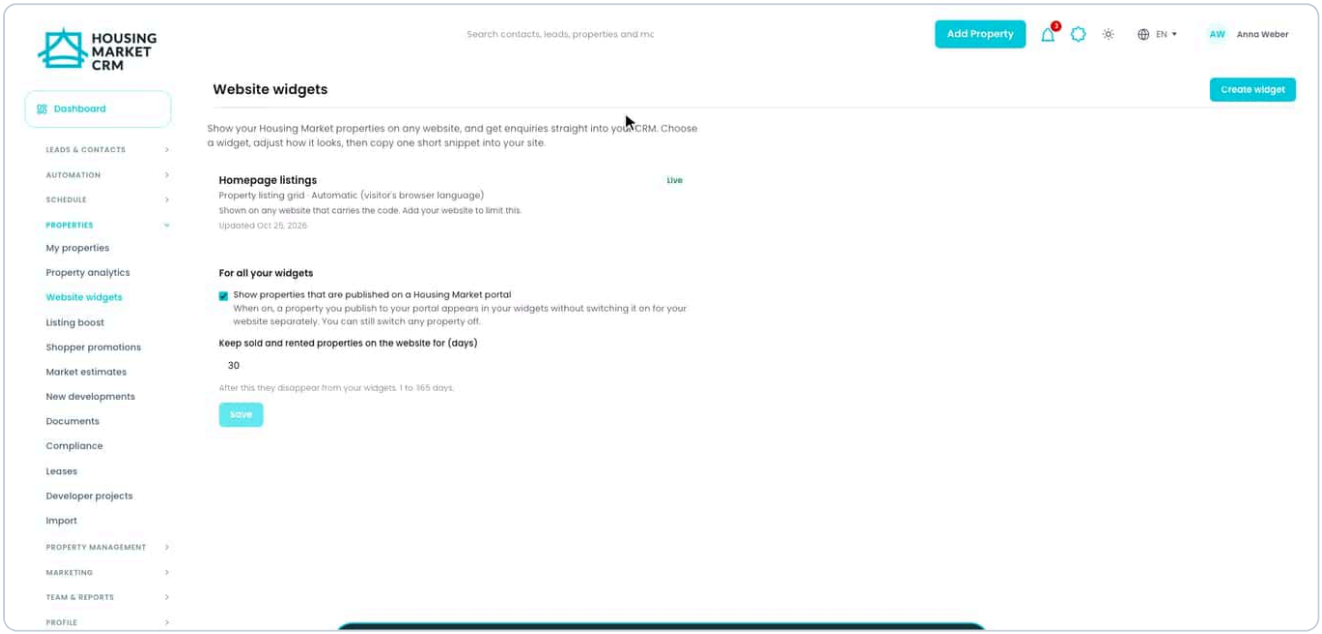


Figure 161.17 · Screen recorded 24 October 2026

18 Settings that apply to **all your widgets** are on the Website widgets page.

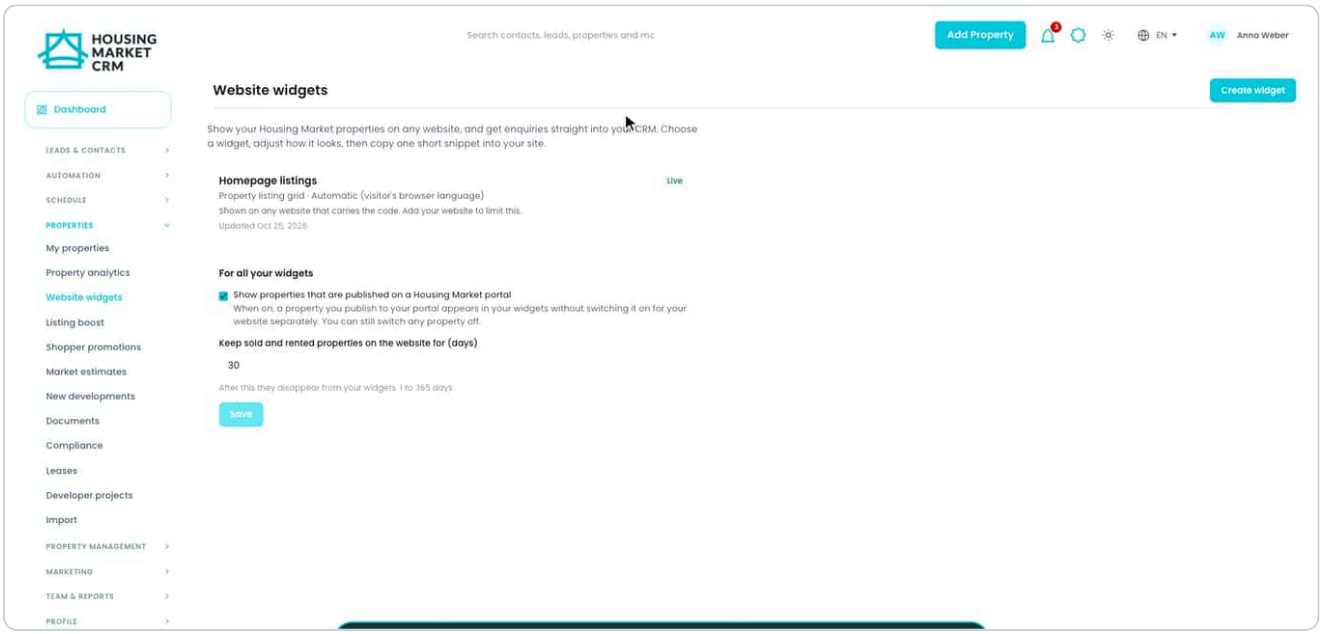


Figure 161.18 · Screen recorded 24 October 2026

19 Keep this on and a property you publish to your **portal** appears on your website by itself.

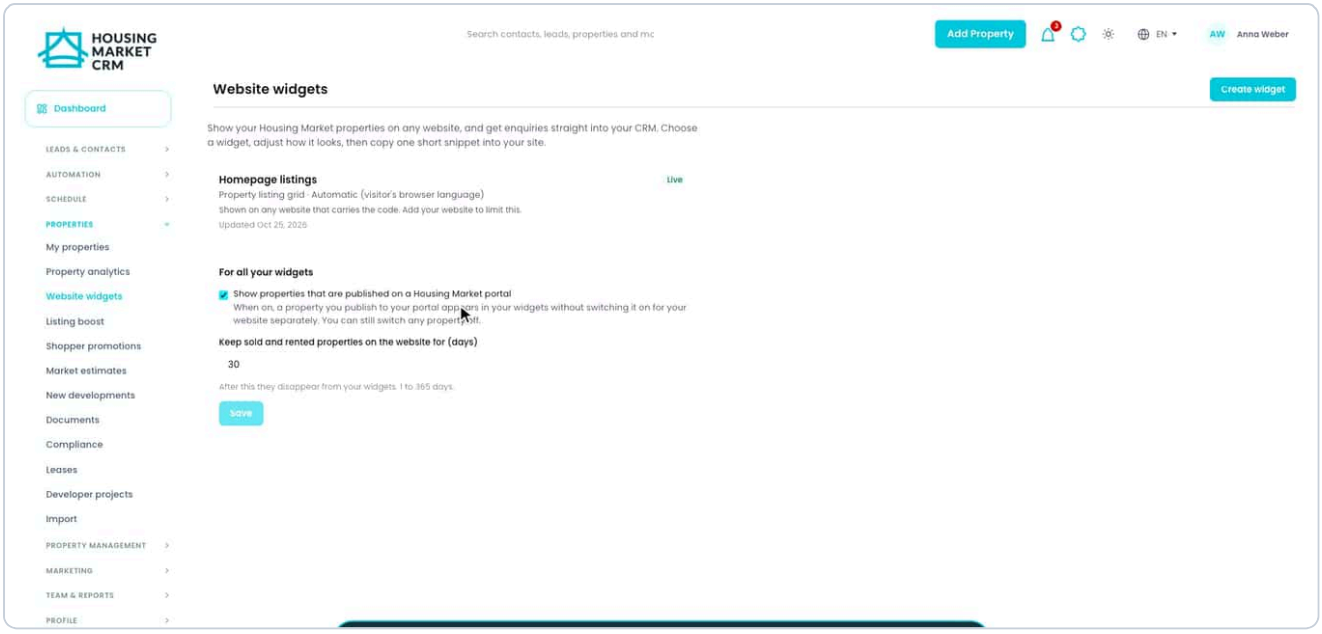


Figure 161.19 · Screen recorded 24 October 2026

20 **Sold and rented** properties stay on your website for this many days then they **disappear** from your widgets.

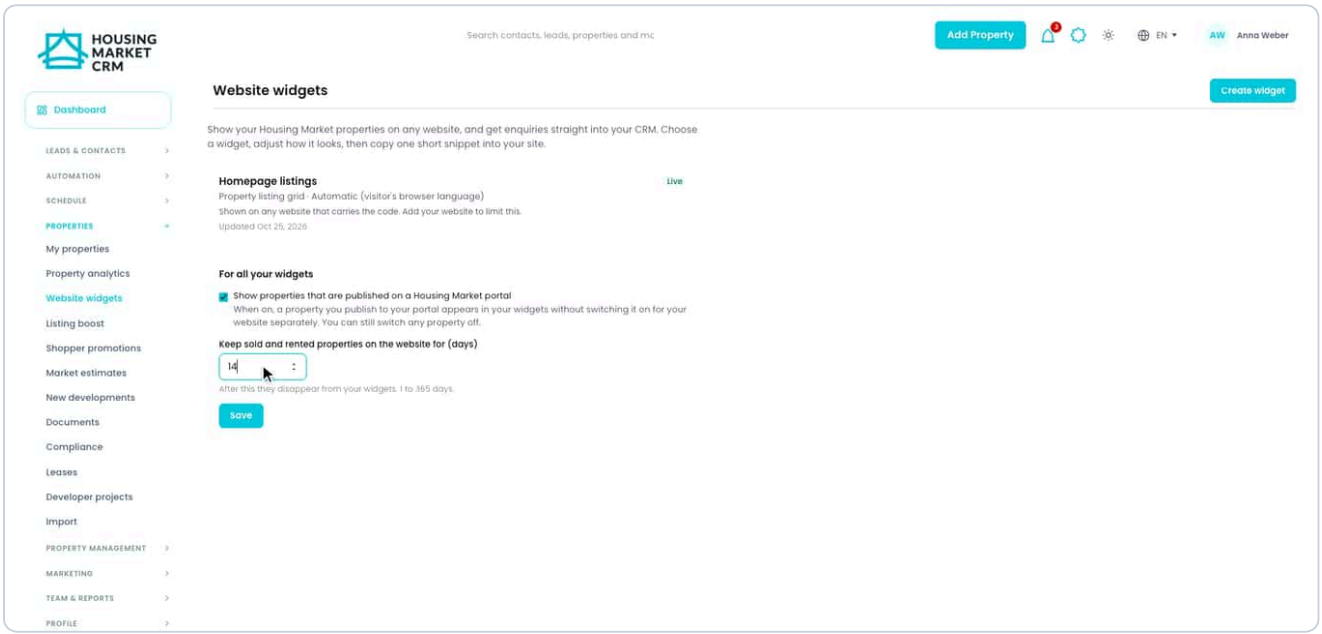


Figure 161.20 · Screen recorded 24 October 2026

21 Click **Save.**

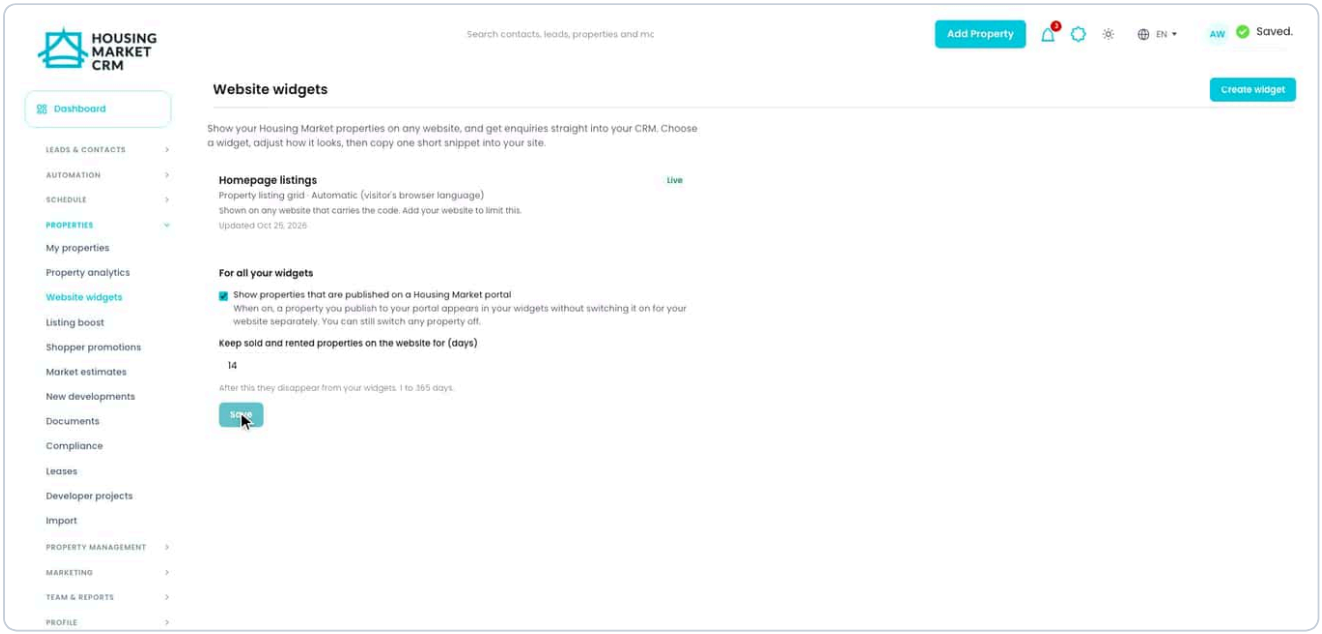


Figure 161.21 · Screen recorded 24 October 2026

22 Saved.

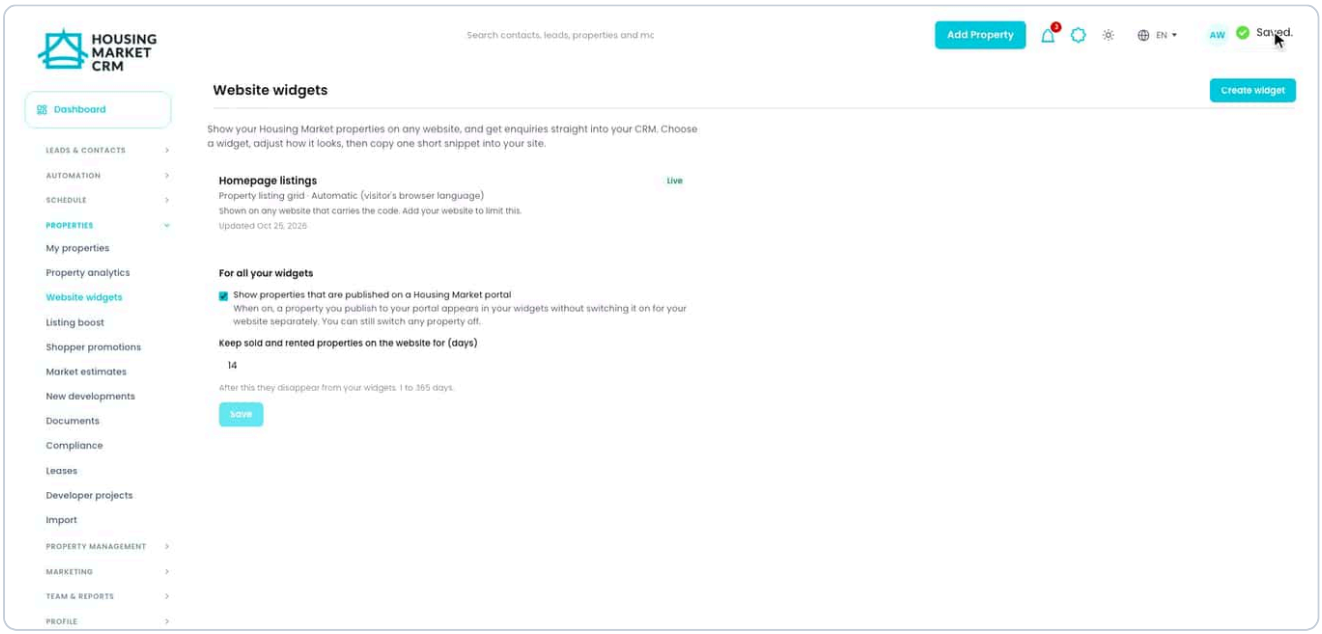


Figure 161.22 · Screen recorded 24 October 2026

RELATED HELP CENTER ARTICLES

Can I manage my property listings? faq.housingmarketgroup.com/faq/can-i-manage-my-property-listings

162 CHAPTER 162

Website widget statistics

Pro and Business | For agents who want their properties on their own website | Watch the video

OVERVIEW

In Property Analytics in Housing Market CRM, which shows the views and enquiries of each widget.

Open Property Analytics in Housing Market CRM to see how each widget is doing: how many times it was viewed and how many enquiries it produced.

Views are counted anonymously and without cookies. The widget works without setting a cookie or any tracking identifier on your visitors.

To see who enquired, open Leads. Every enquiry from a widget has the source “Website widget”.

From the Help Center: **Where do I see Website Widget statistics?**

STEP BY STEP

1 This is your **Housing Market CRM** dashboard.

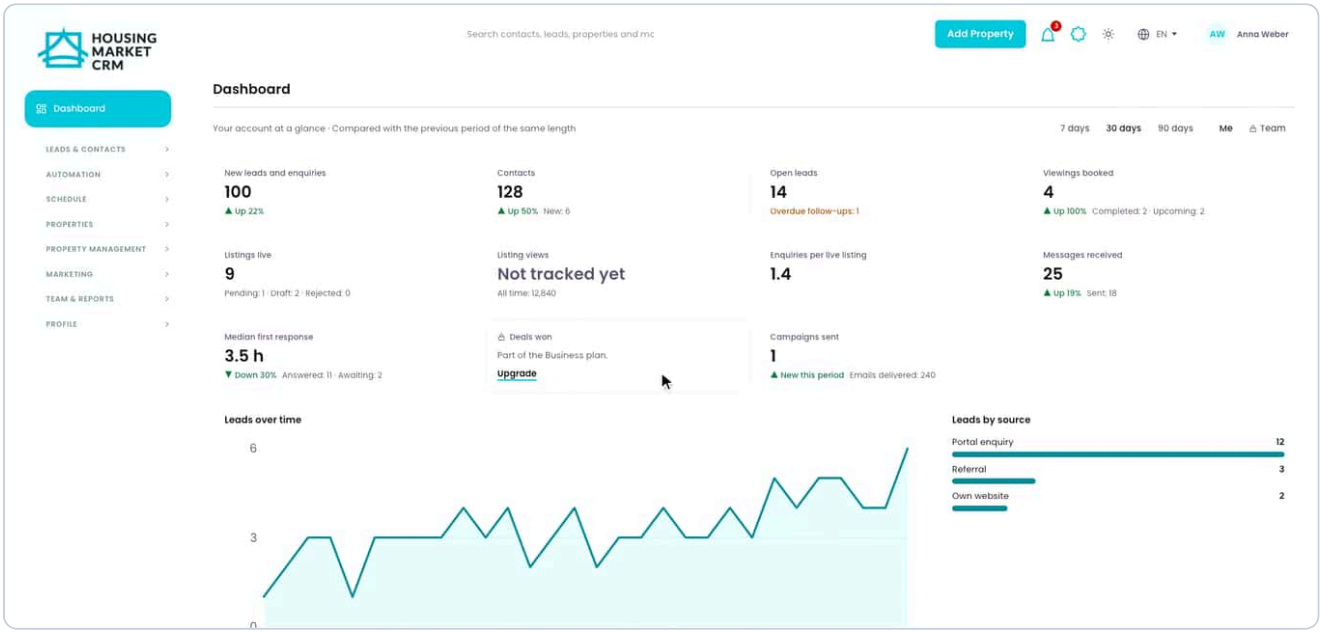


Figure 162.1 · Screen recorded 24 October 2026

2 Open **Properties** in the left menu.

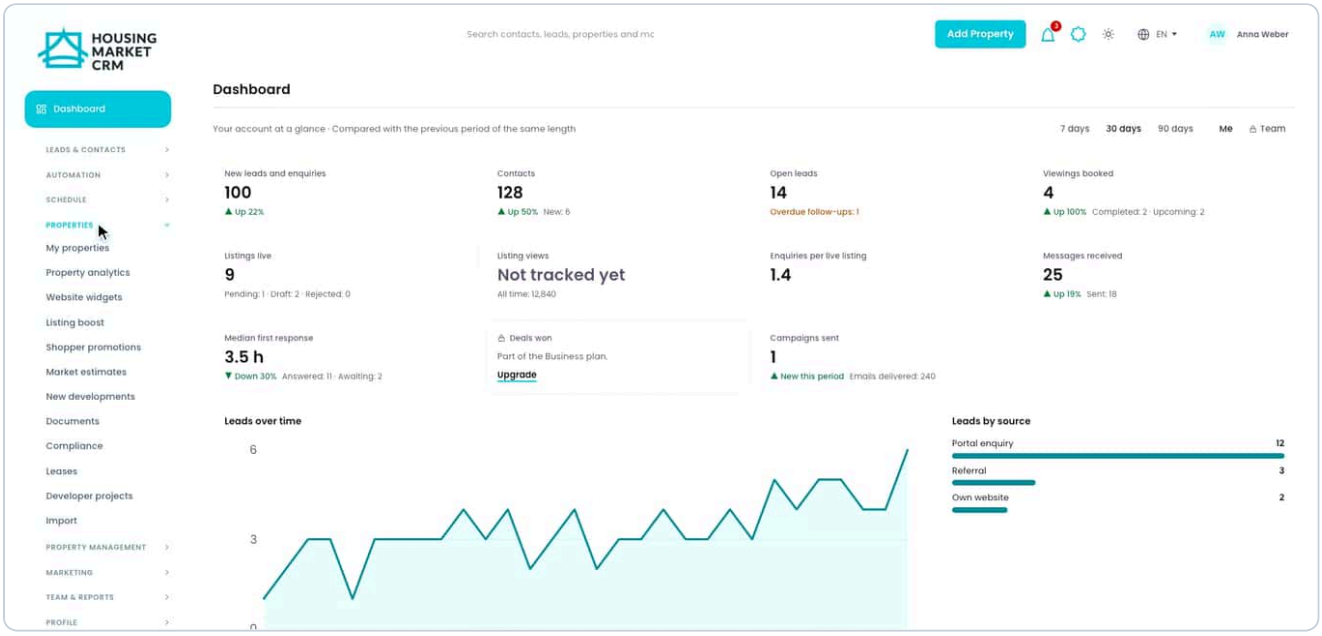


Figure 162.2 · Screen recorded 24 October 2026

3 Click **Property analytics**.

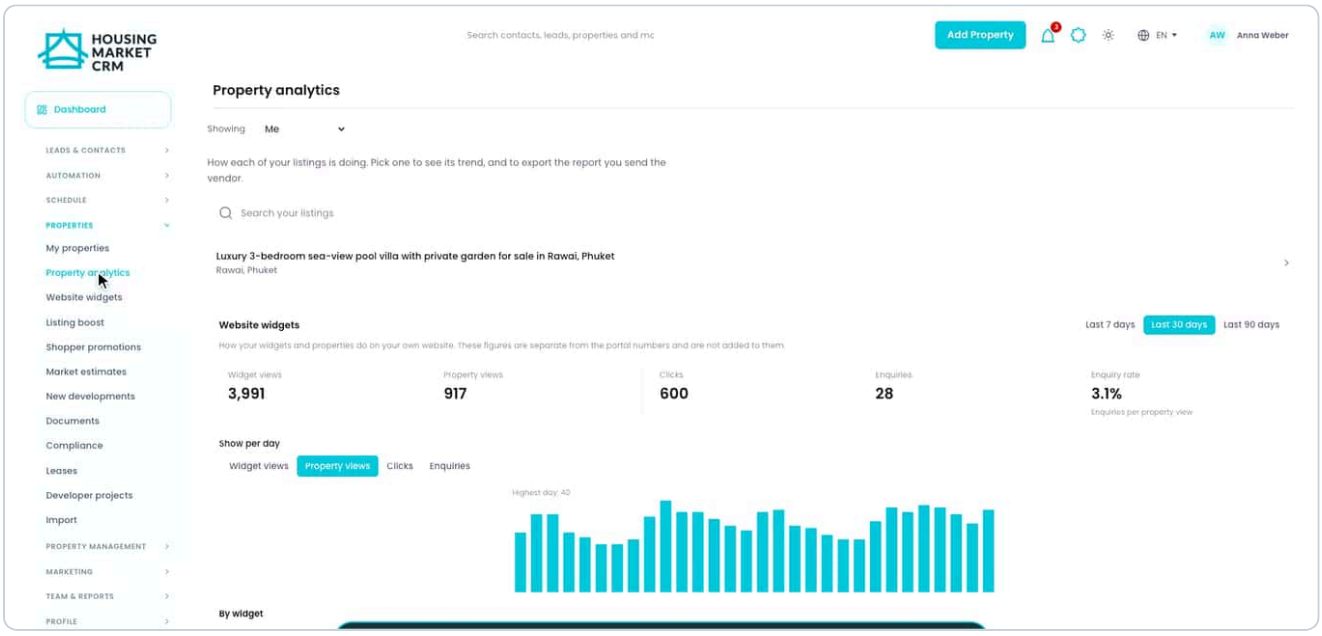


Figure 162.3 · Screen recorded 24 October 2026

4 At the bottom, **Website widgets** shows how your widgets do on your own website.

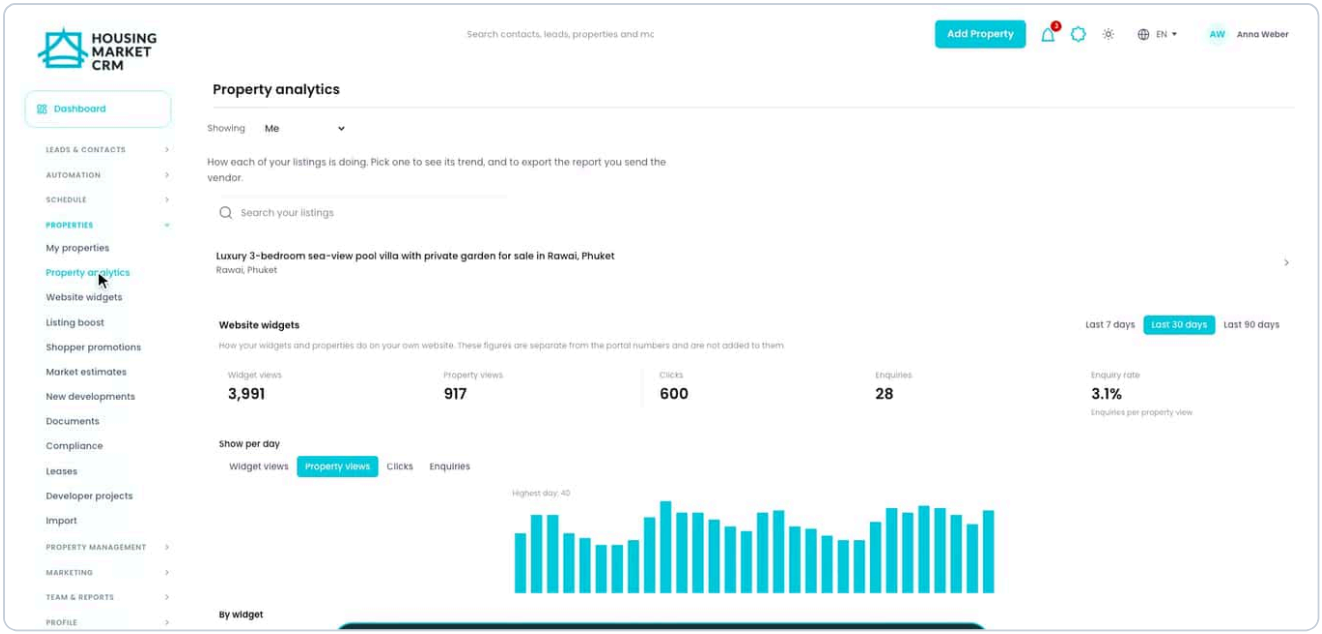


Figure 162.4 · Screen recorded 24 October 2026

5 These figures are **separate** from your portal numbers and are never added to them.

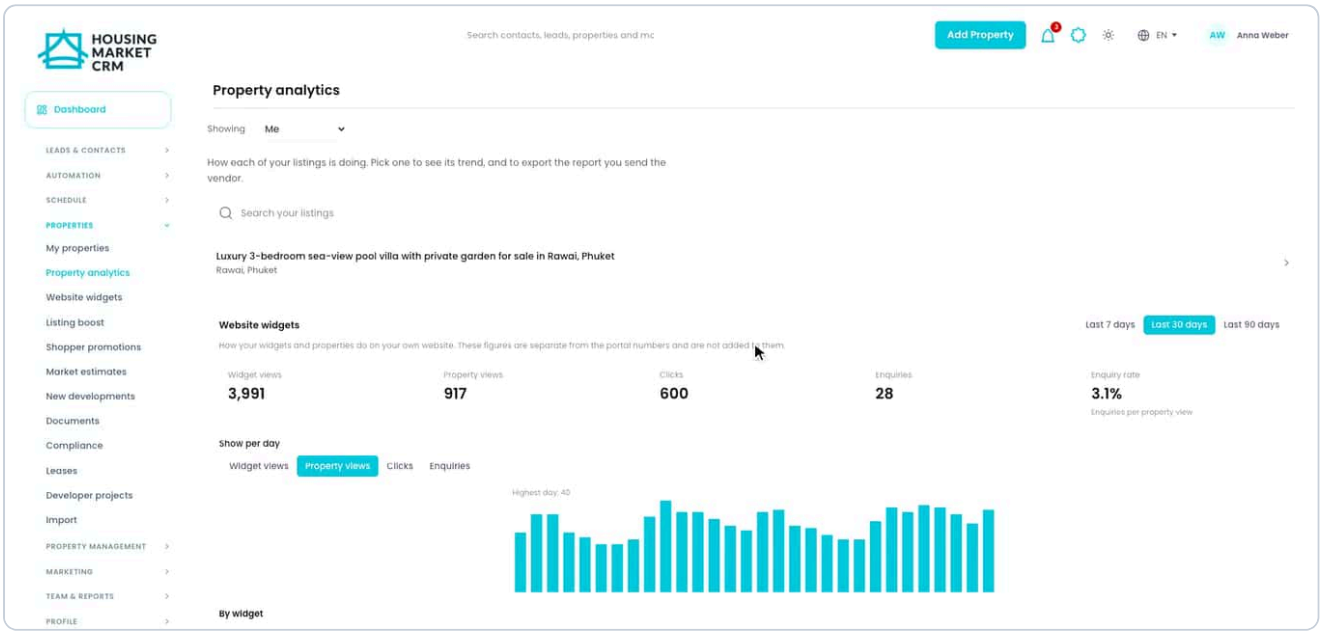


Figure 162.5 · Screen recorded 24 October 2026

6 **Widget views**: how often a widget was seen on a page.

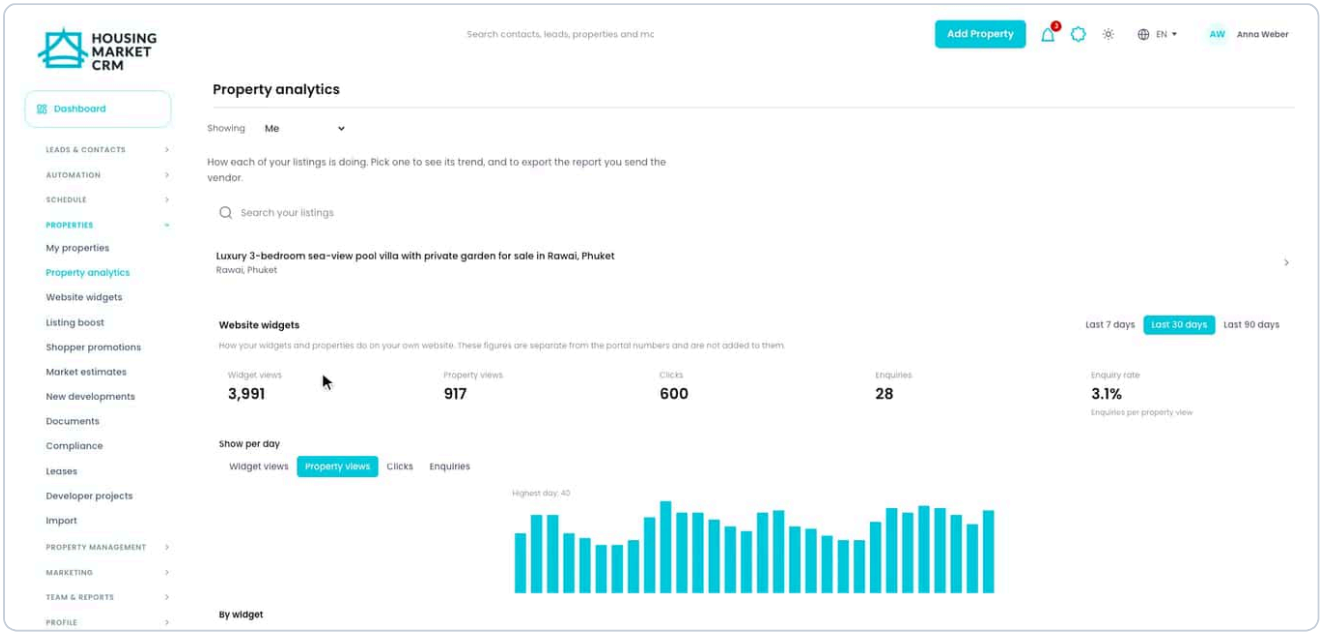


Figure 162.6 · Screen recorded 24 October 2026

7 **Property views**: how often a visitor opened a property.

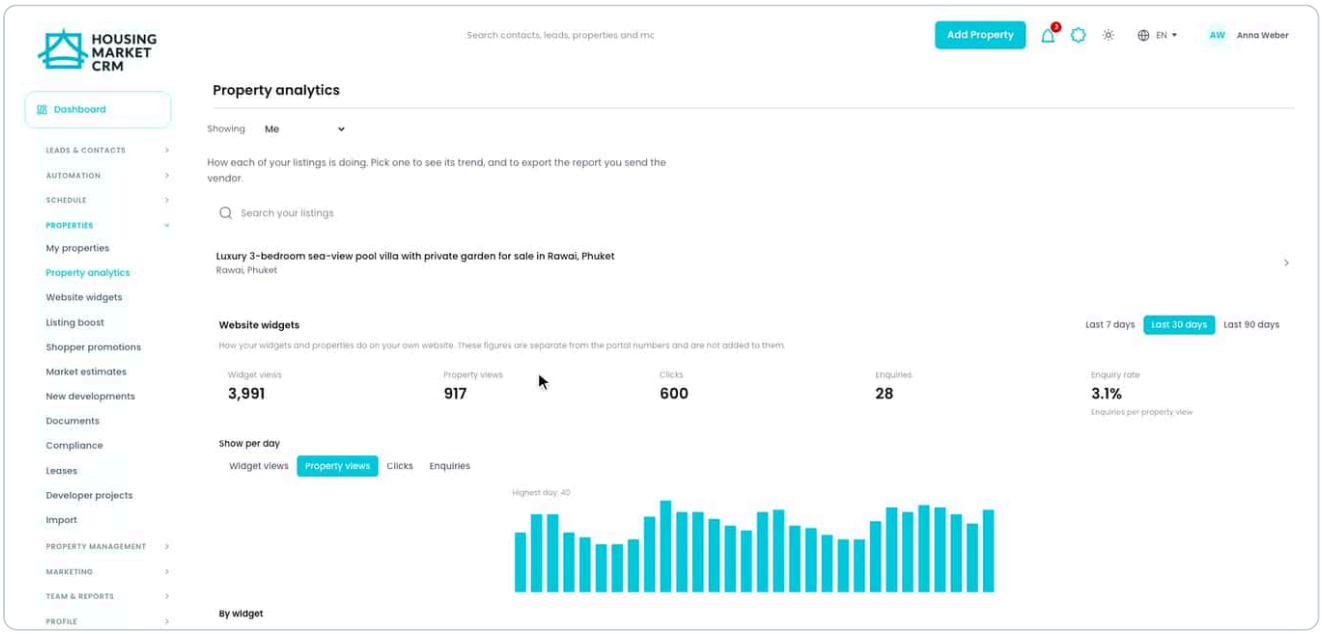


Figure 162.7 · Screen recorded 24 October 2026

8 Clicks and enquiries and the enquiry rate: enquiries for every property view.

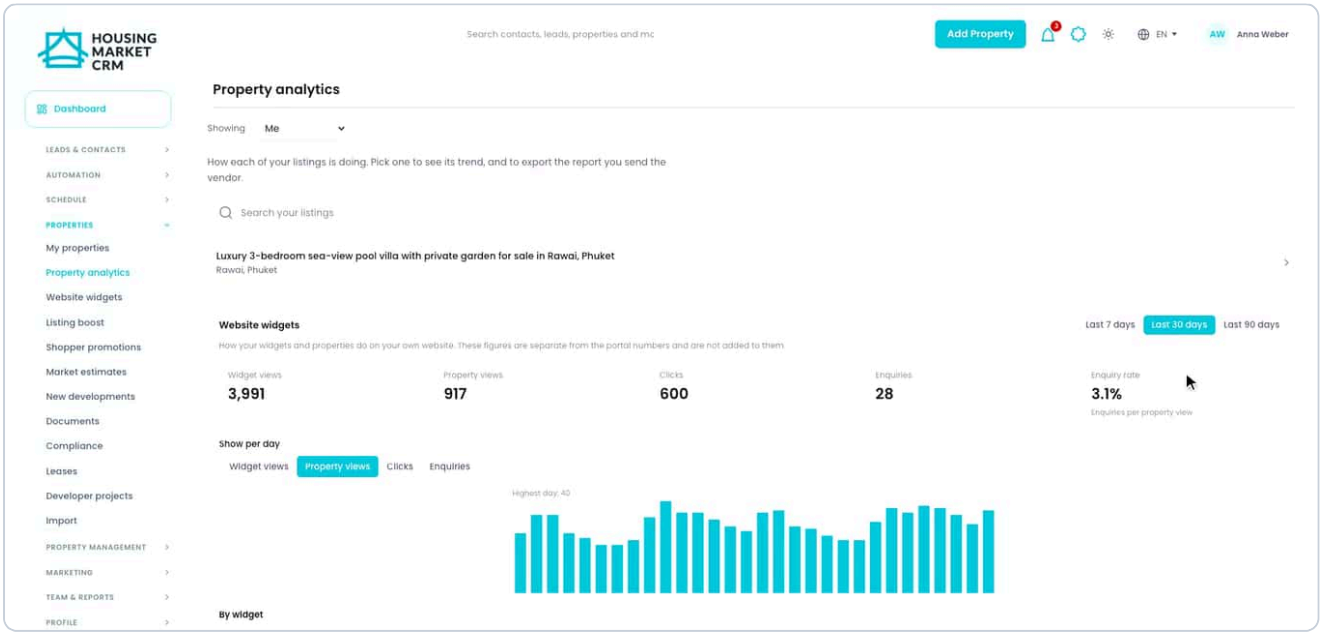


Figure 162.8 · Screen recorded 24 October 2026

9 Choose the period: the last 7 days or 90 days.

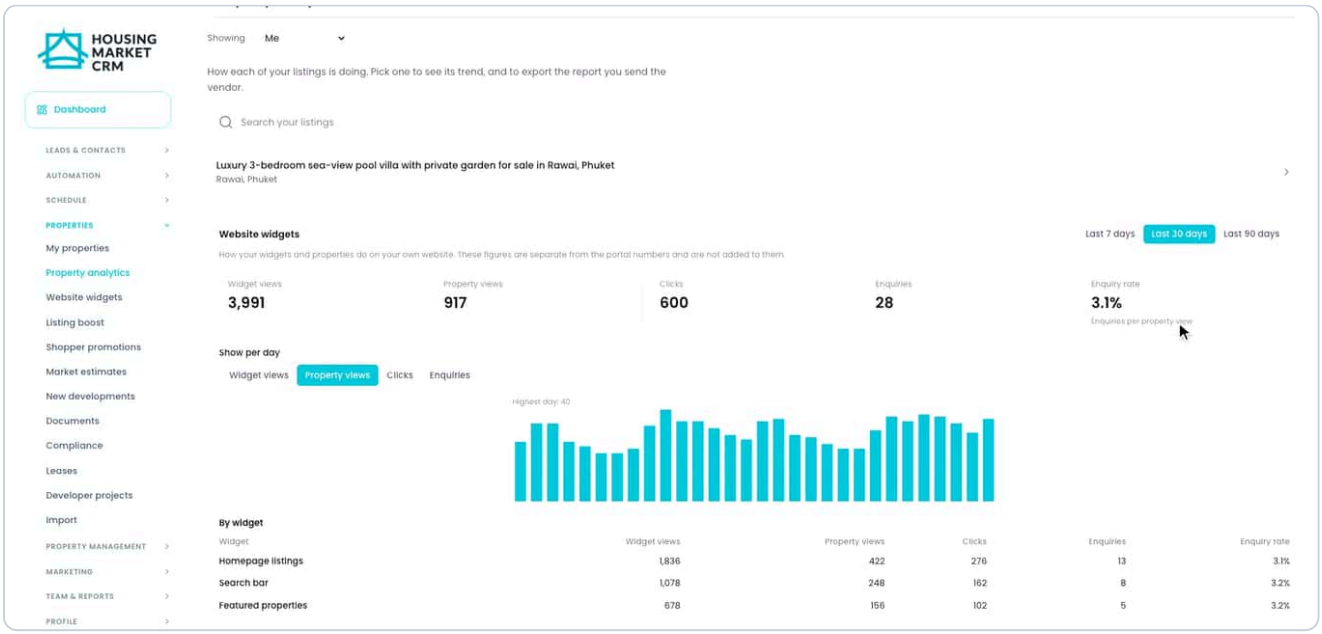


Figure 162.9 · Screen recorded 24 October 2026

10 Pick what to **chart** day by day.

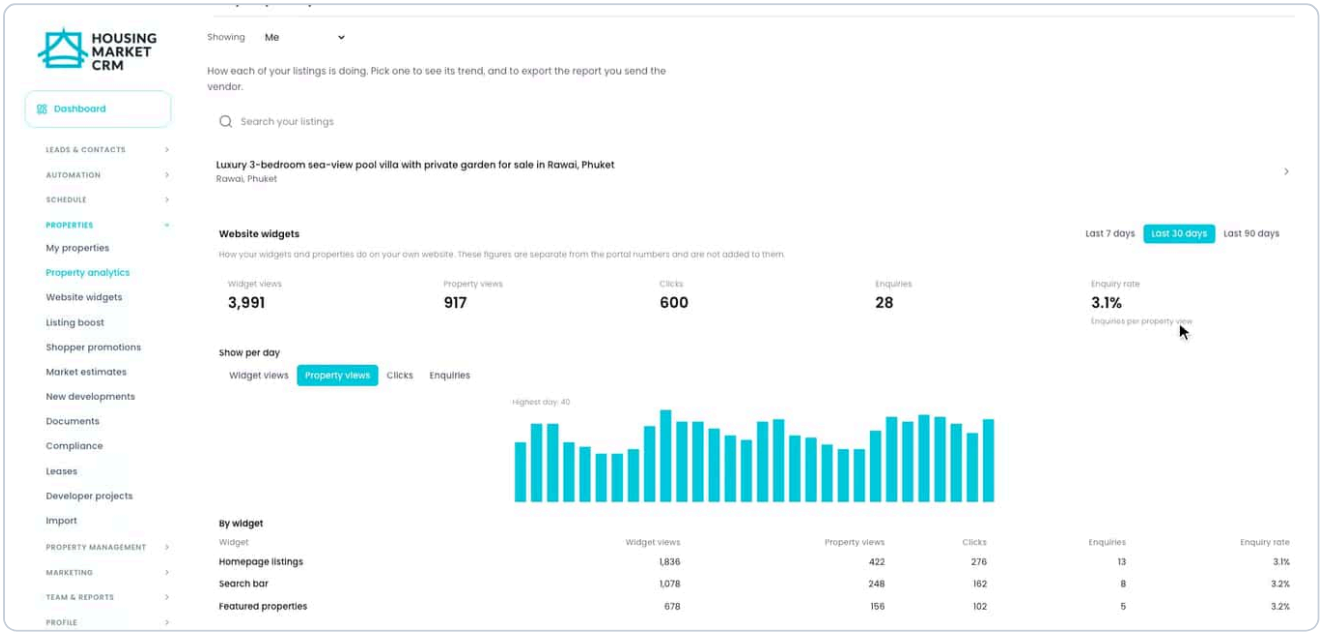


Figure 162.10 · Screen recorded 24 October 2026

11 For example your **enquiries**.

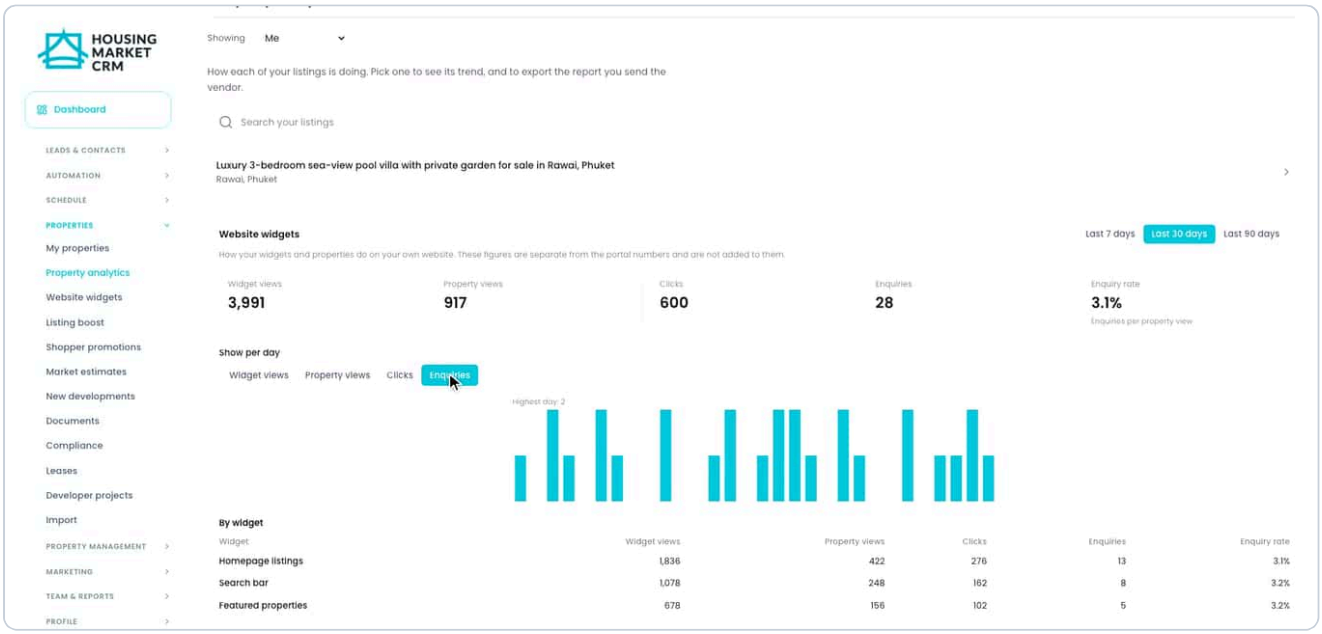


Figure 162.11 · Screen recorded 24 October 2026

12 Or your **widget views**.

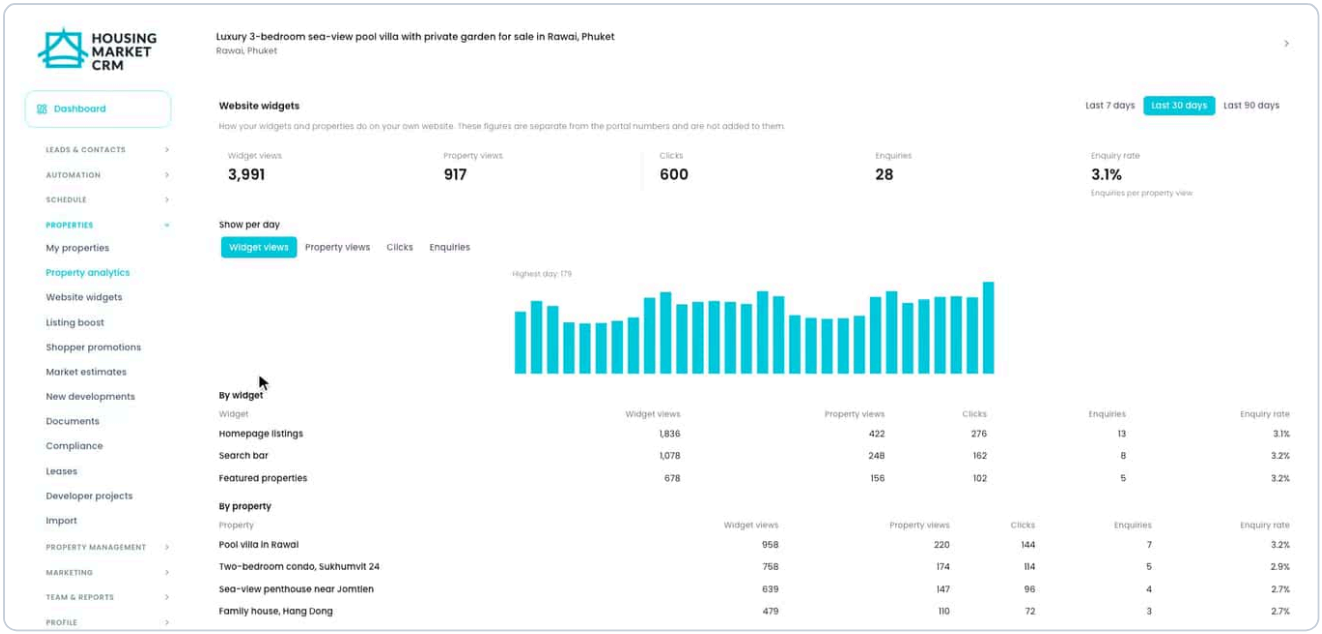


Figure 162.12 · Screen recorded 24 October 2026

13 **By widget**: which of your widgets brings the most.

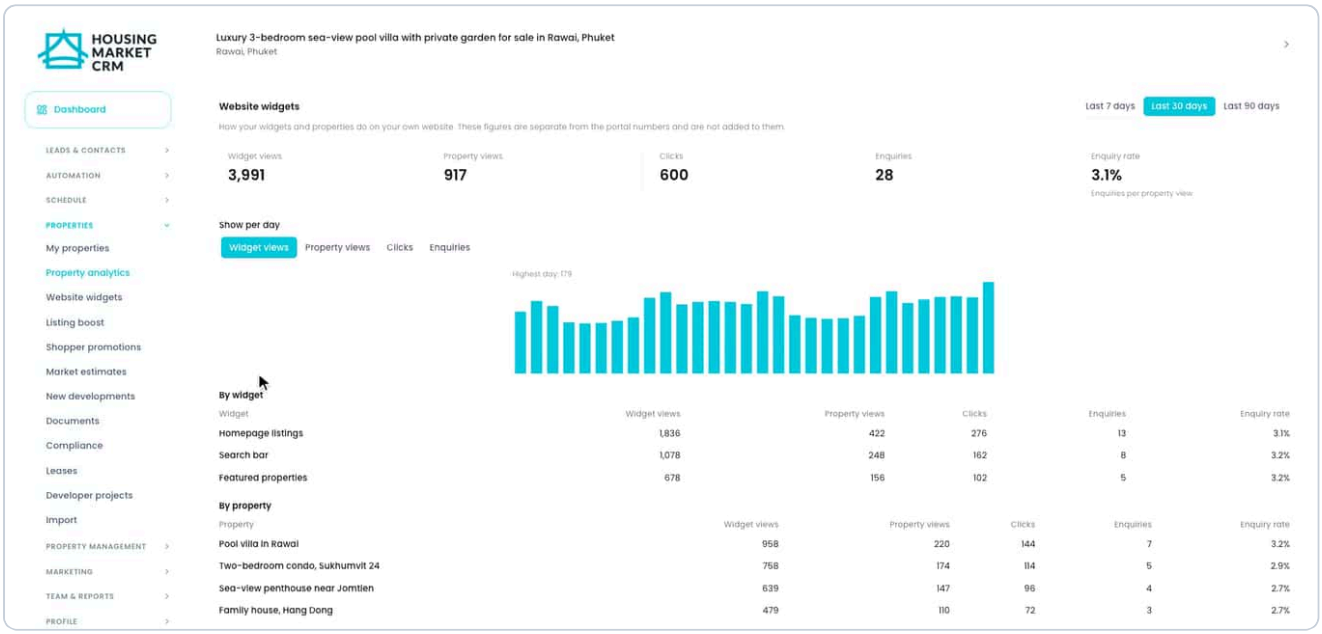


Figure 162.13 · Screen recorded 24 October 2026

14 Open a widget from this table to change it.

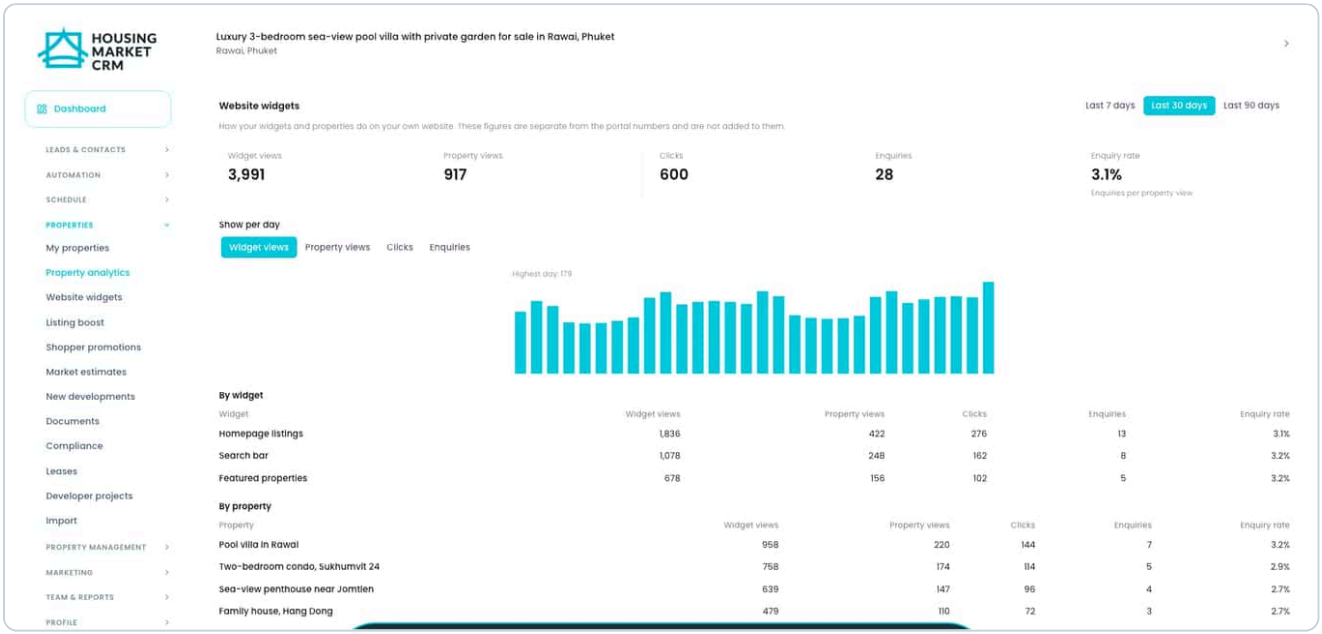


Figure 162.14 · Screen recorded 24 October 2026

15 By property: which homes visitors open and ask about.



Figure 162.15 · Screen recorded 24 October 2026

16 Many views and few enquiries? Look at that property's **photos** and **description**.

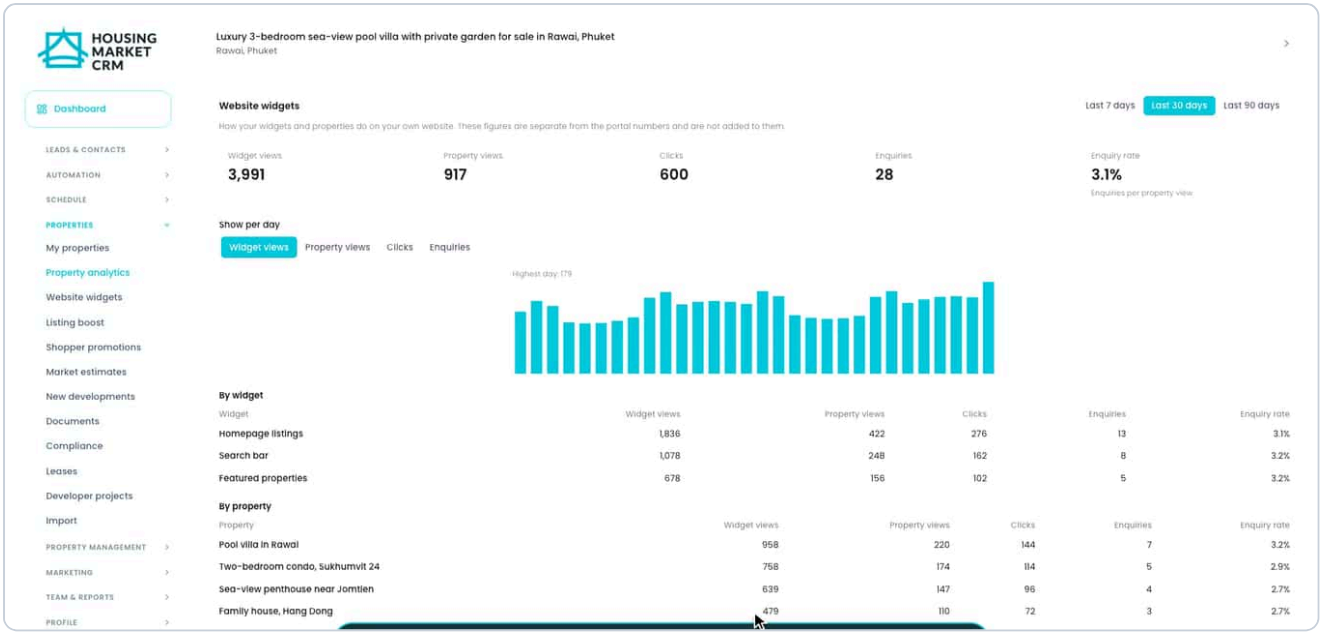


Figure 162.16 · Screen recorded 24 October 2026

RELATED HELP CENTER ARTICLES

Can I monitor my performance? — faq.housingmarketgroup.com/faq/can-i-monitor-my-performance

163 CHAPTER 163

Retarget your website visitors with Ads

Pro and Business | For agents who want their properties on their own website | Watch the video

OVERVIEW

An optional pixel, off by default, on Pro and above. It builds an audience from visitors to your own website who agreed to advertising, so your Housing Market Ads campaigns can show them your listings.

The widget can double as the pixel for Housing Market Ads. It is optional and off by default. Turn it on in the widget's Properties and ads tab. It needs the Pro plan or above and a Housing Market Ads account.

Consent comes first. Nothing that identifies a visitor is stored until they agree to advertising. The widget follows your website's own cookie banner (Cookiebot, CookieYes, Complianz, OneTrust, Google Consent Mode or an IAB TCF banner). If your website has none, the widget shows a small Accept and Decline bar.

A visitor is recognised only on your own website, not across other websites. Visitors who agreed can then be shown your listings by your Housing Market Ads campaigns. Remember to mention the widget and the pixel in your own website's privacy statement.

From the Help Center: **How does the Website Widget retargeting pixel work?**

STEP BY STEP

1 This is your **Housing Market CRM** dashboard.

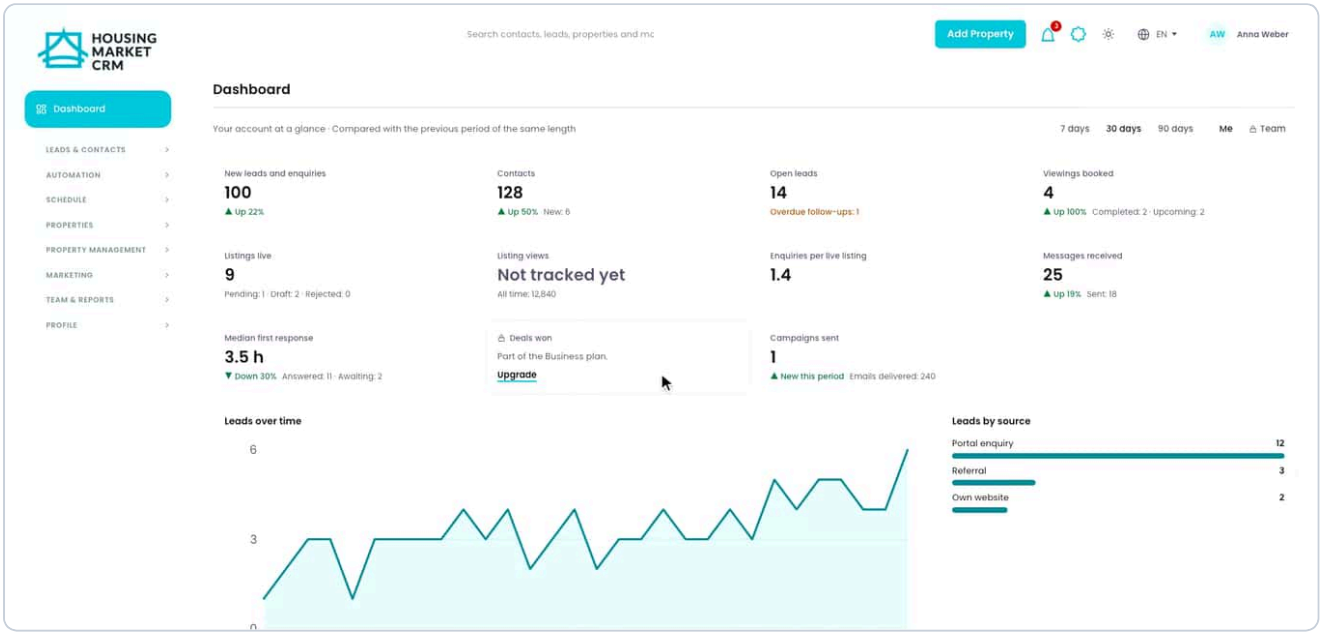


Figure 163.1 · Screen recorded 24 October 2026

2 Open **Properties** in the left menu.

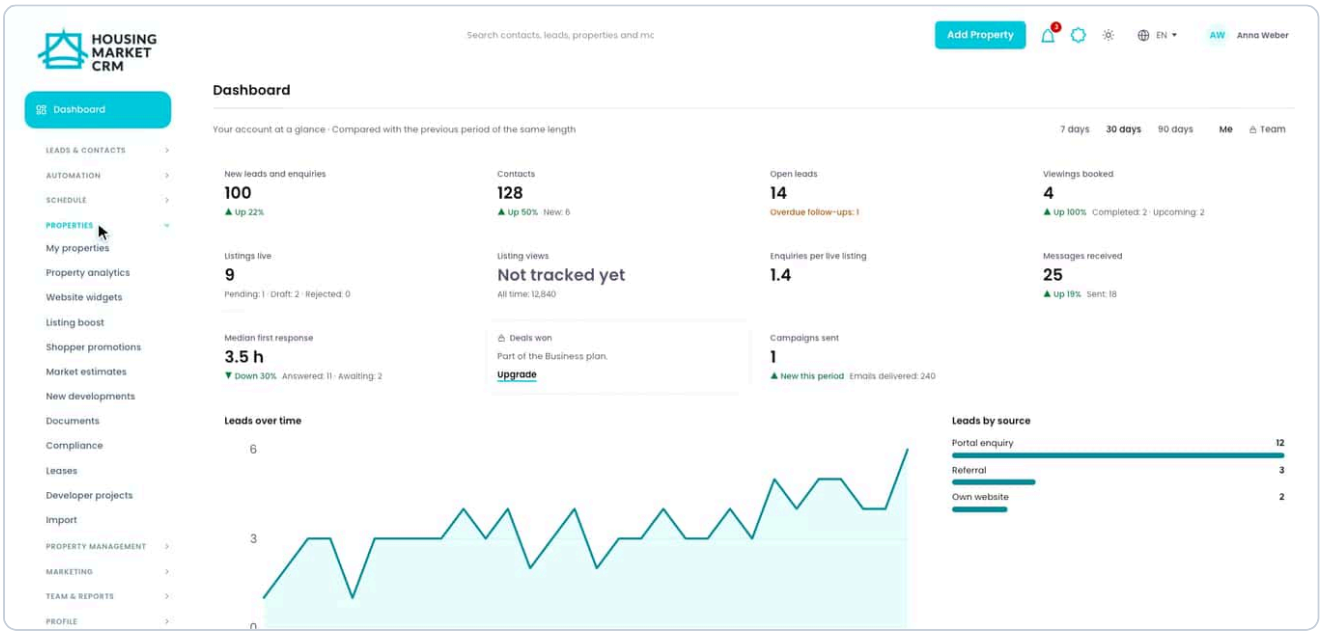


Figure 163.2 · Screen recorded 24 October 2026

3 Click **Website widgets.**

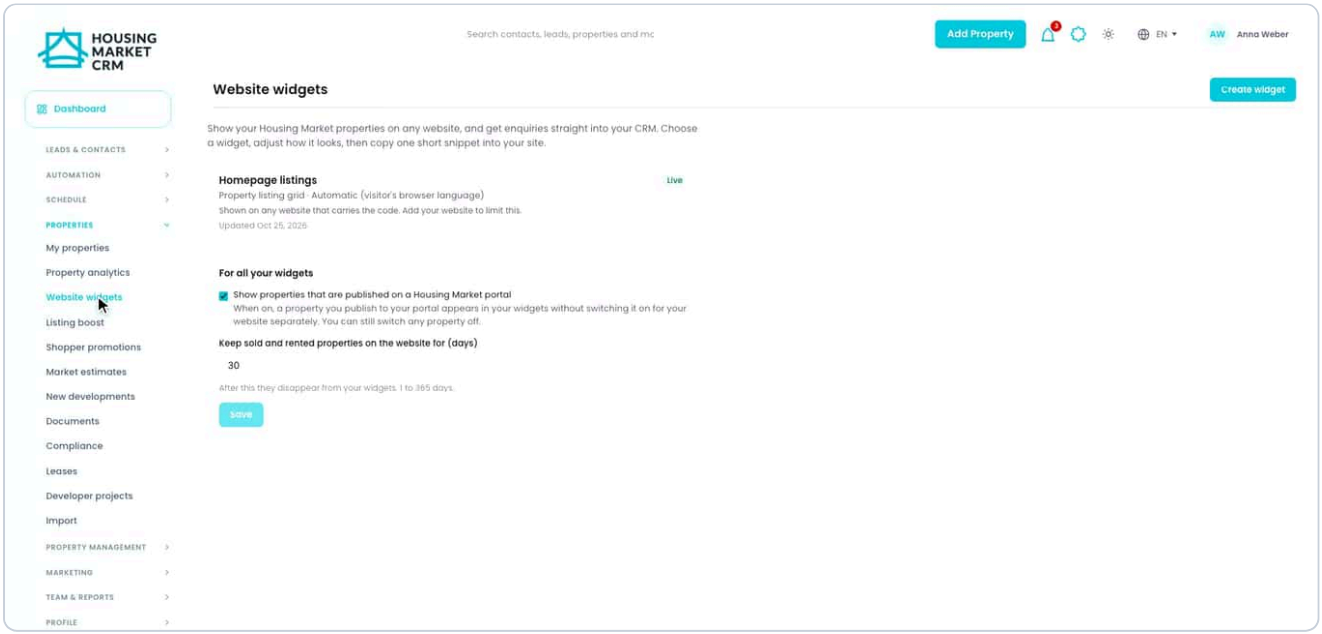


Figure 163.3 · Screen recorded 24 October 2026

4 Open **Homepage listings.**

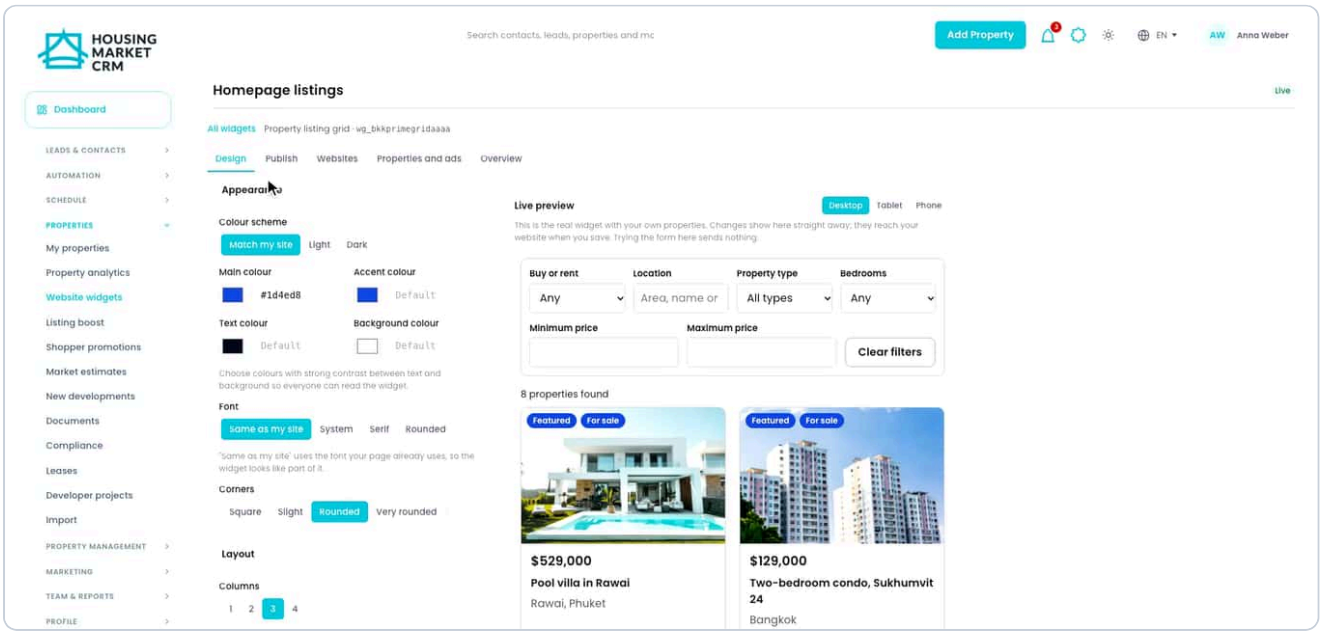


Figure 163.4 · Screen recorded 24 October 2026

5 Open the **Properties and ads** tab.

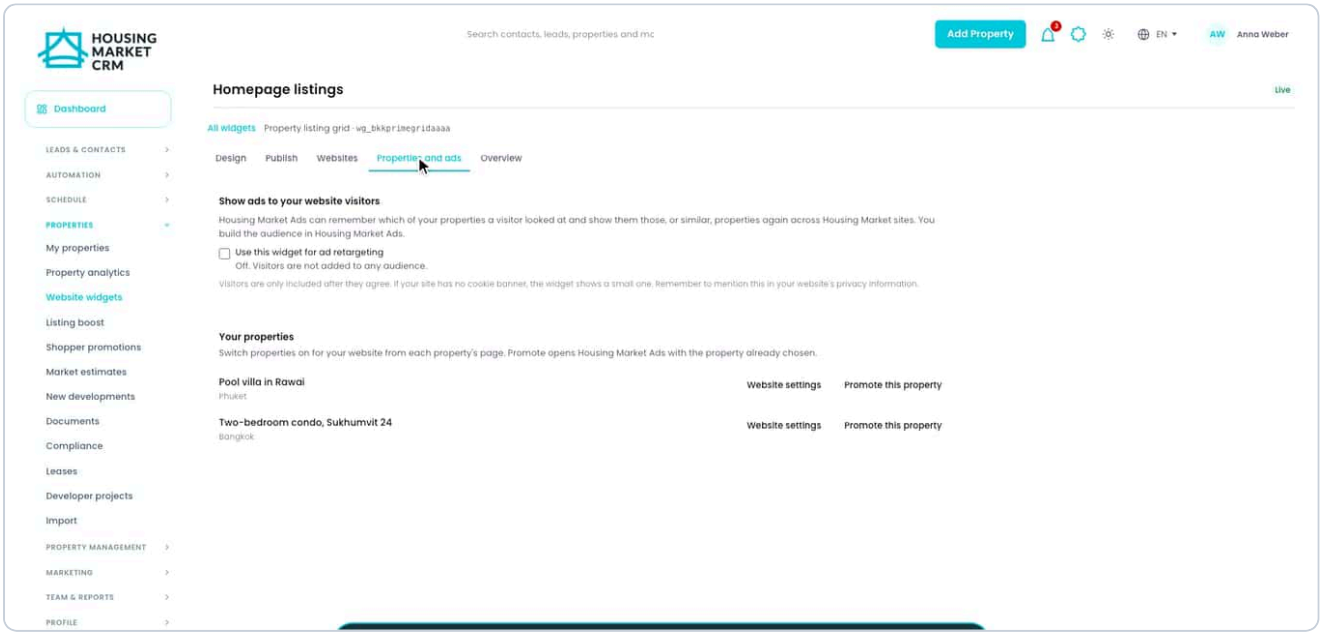


Figure 163.5 · Screen recorded 24 October 2026

6 **Retargeting** shows visitors the properties they looked at, again, across Housing Market sites.

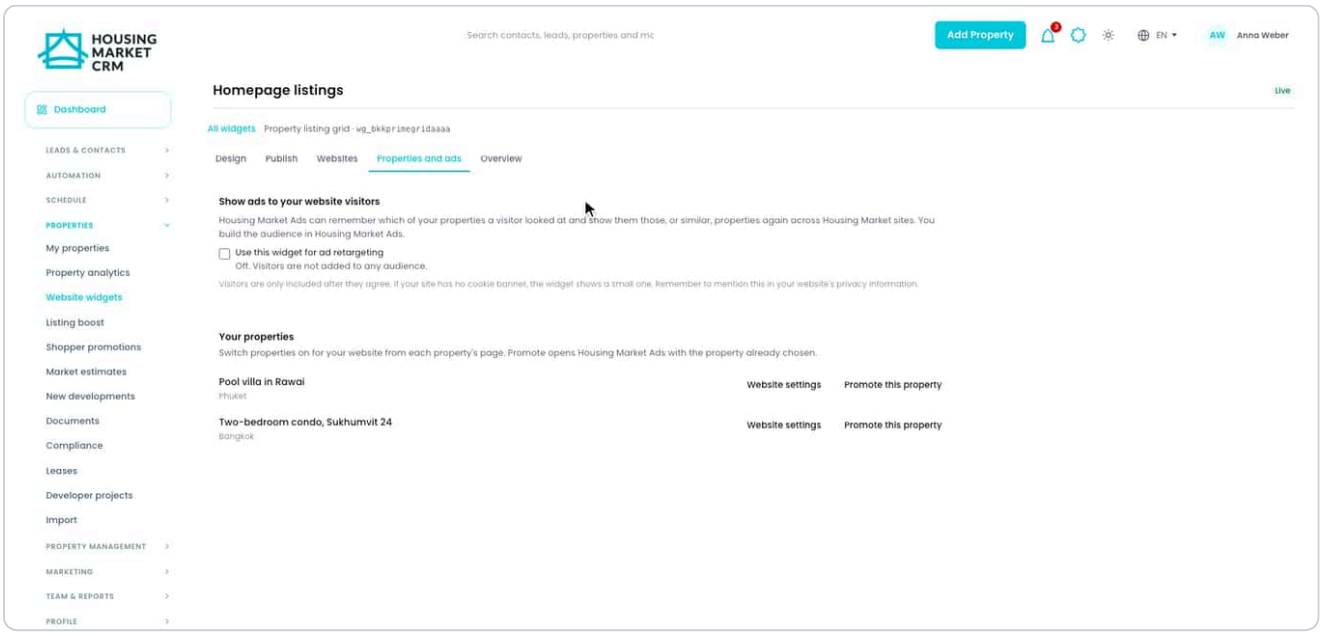


Figure 163.6 · Screen recorded 24 October 2026

7 It is **off** until you turn it on.

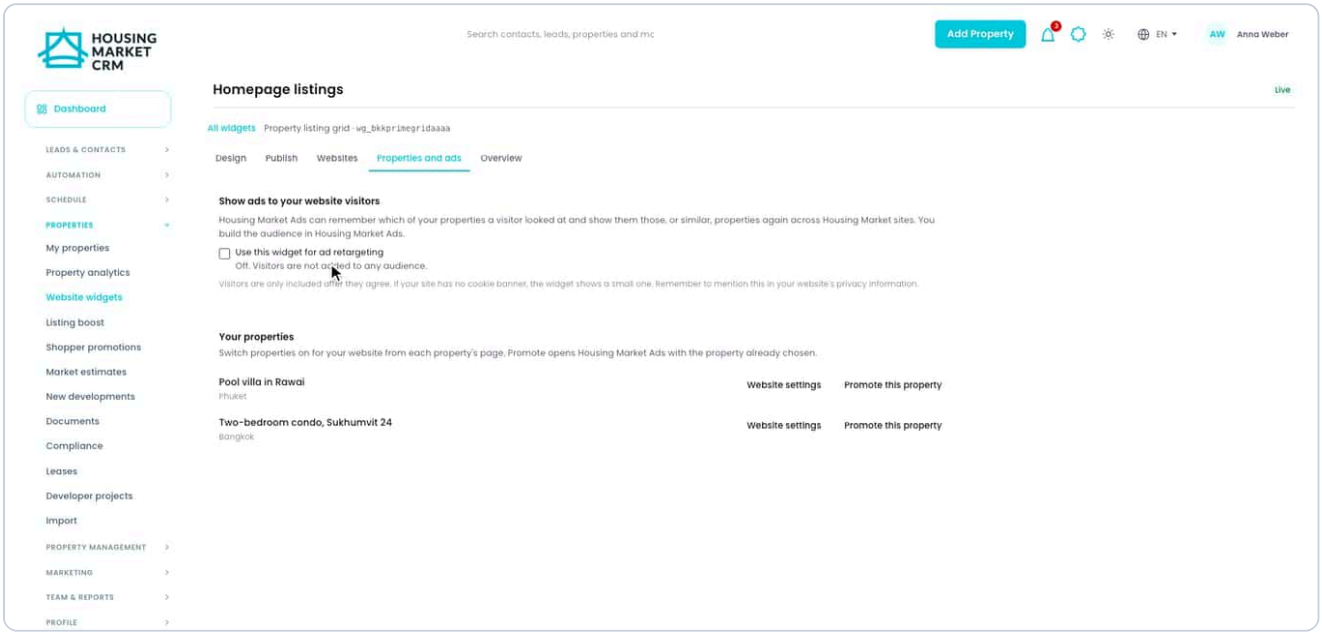


Figure 163.7 · Screen recorded 24 October 2026

8 Tick **Use this widget for ad retargeting**.

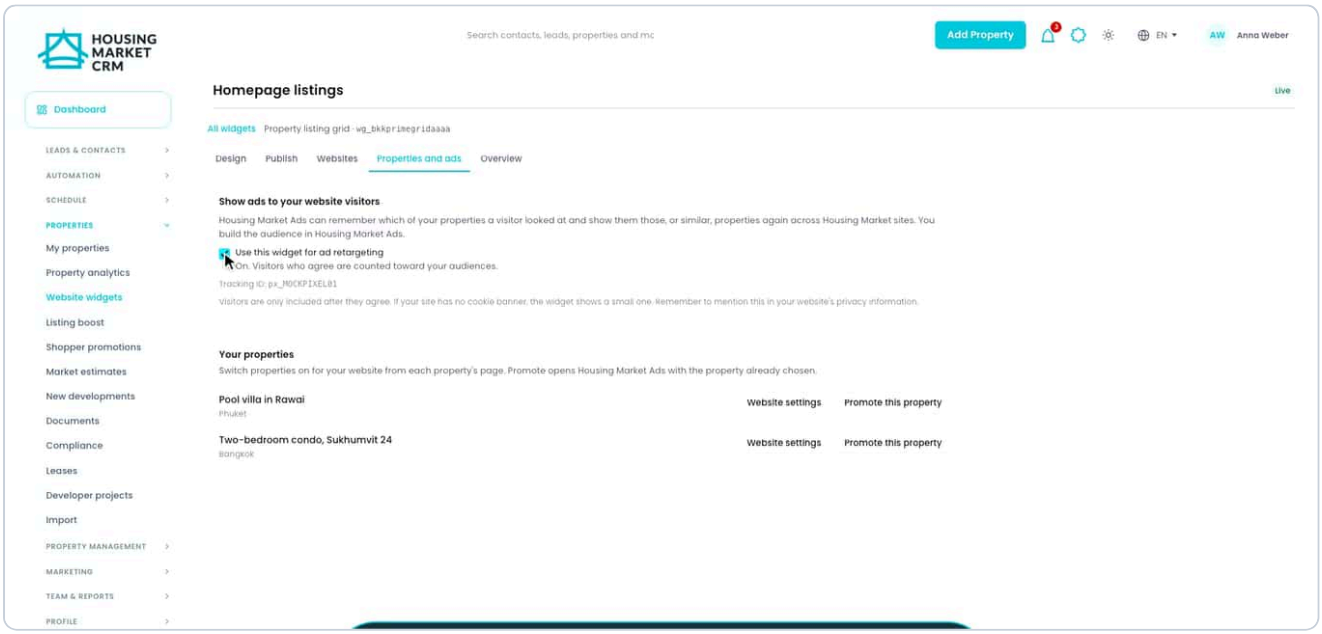


Figure 163.8 · Screen recorded 24 October 2026

9 It is **on**. Visitors who agree are counted toward your audiences.

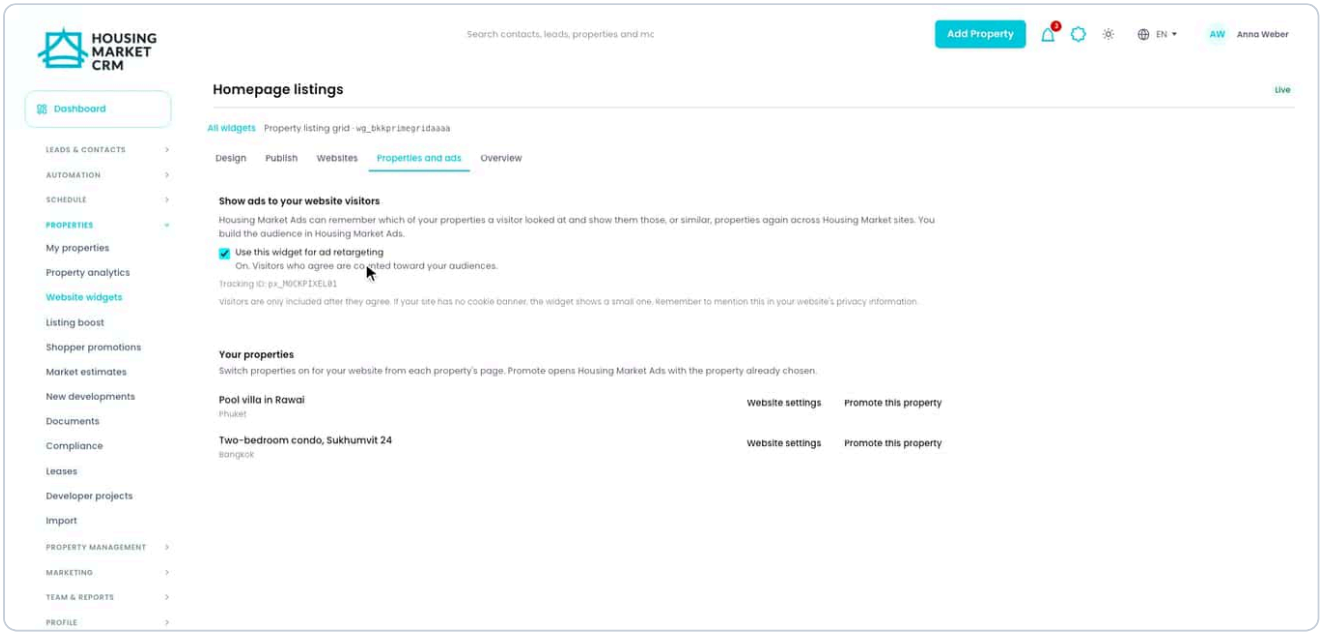


Figure 163.9 · Screen recorded 24 October 2026

10 The **tracking ID** links this widget to your Ads account.

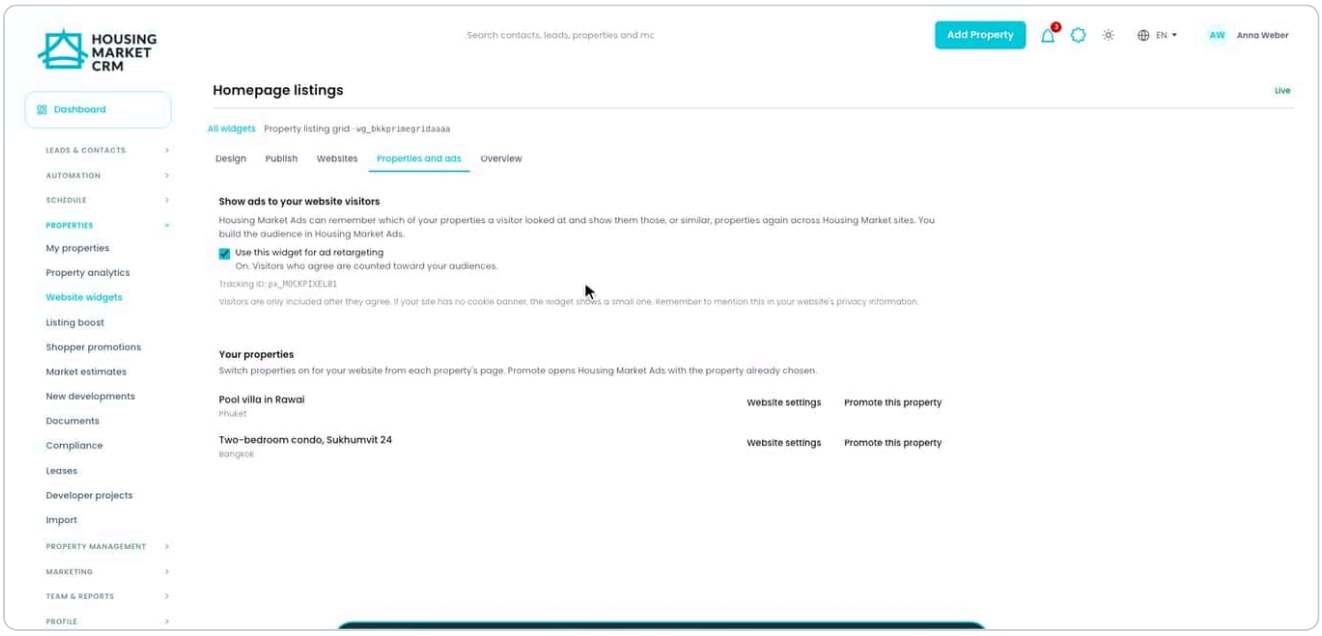


Figure 163.10 · Screen recorded 24 October 2026

11 Visitors are **only included after they agree**. With no cookie banner on your site, the widget shows a small one.

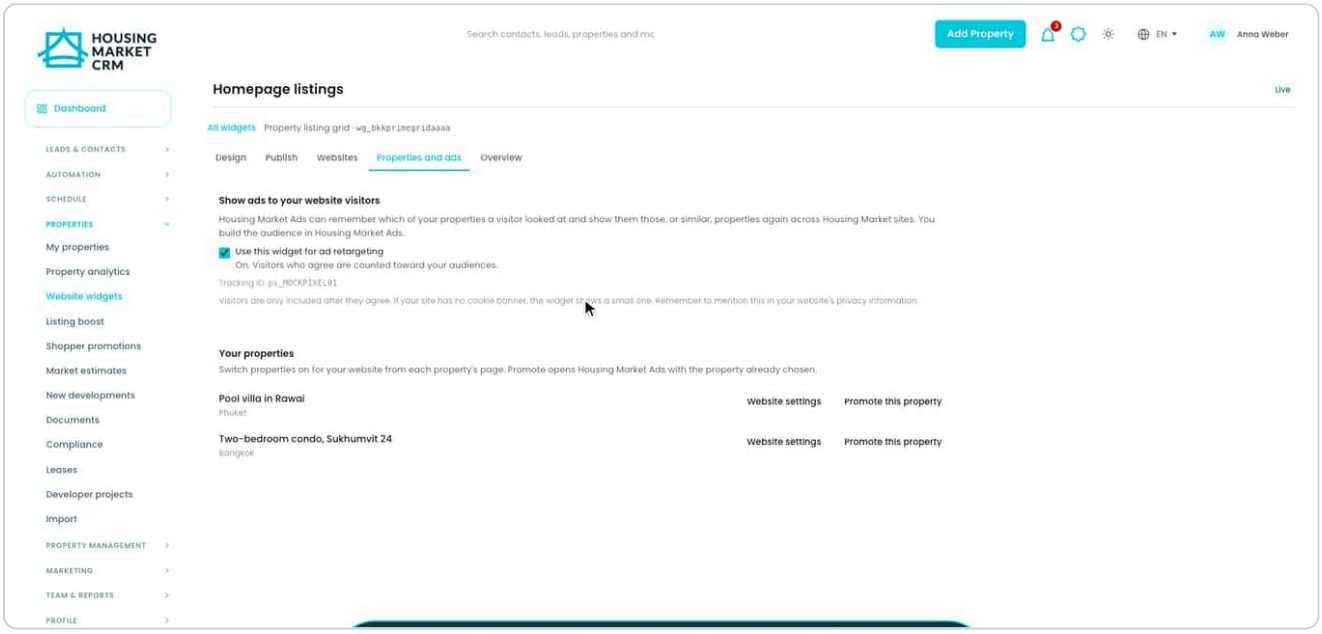


Figure 163.11 · Screen recorded 24 October 2026

12 Remember to mention it in your website's **privacy information**.

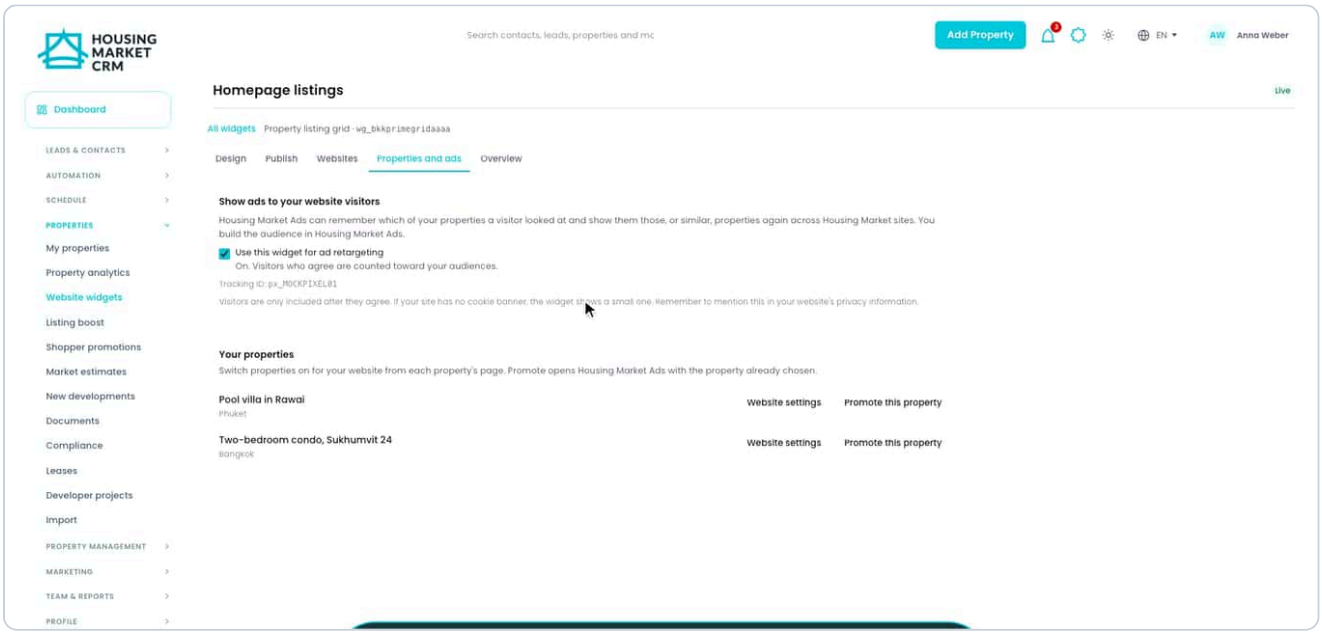


Figure 163.12 · Screen recorded 24 October 2026

13 You build and use the **audiences** in Housing Market Ads.

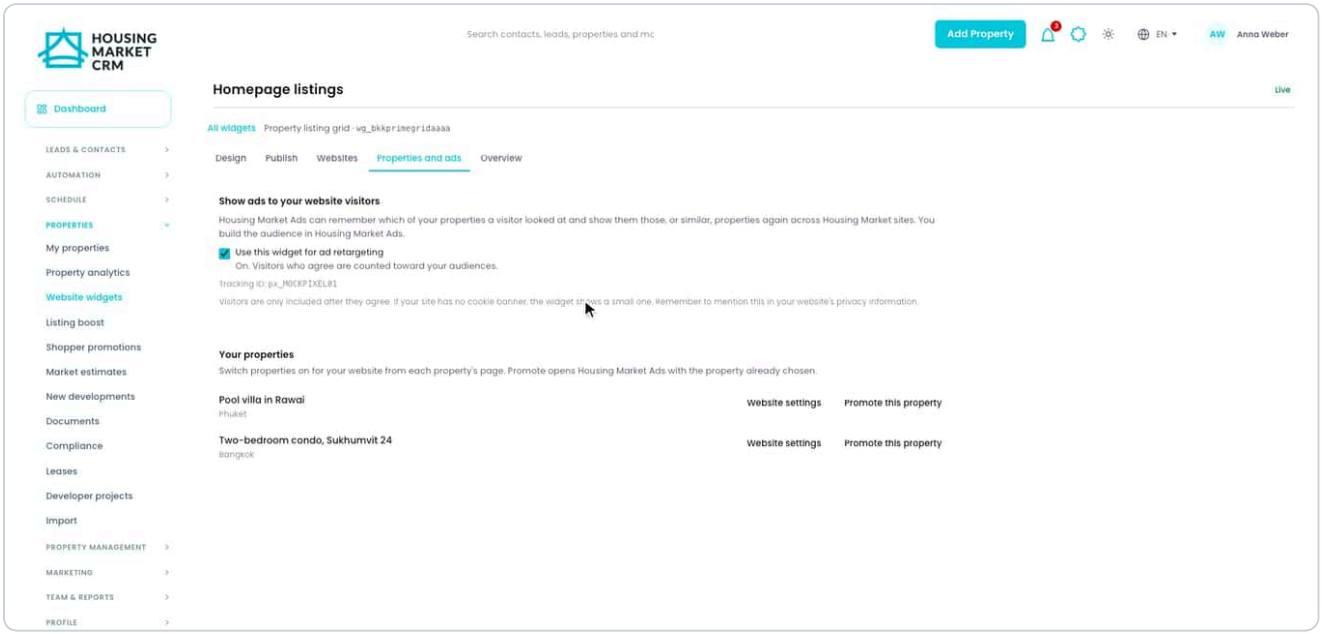


Figure 163.13 · Screen recorded 24 October 2026

14 Untick it to turn retargeting **off** again.

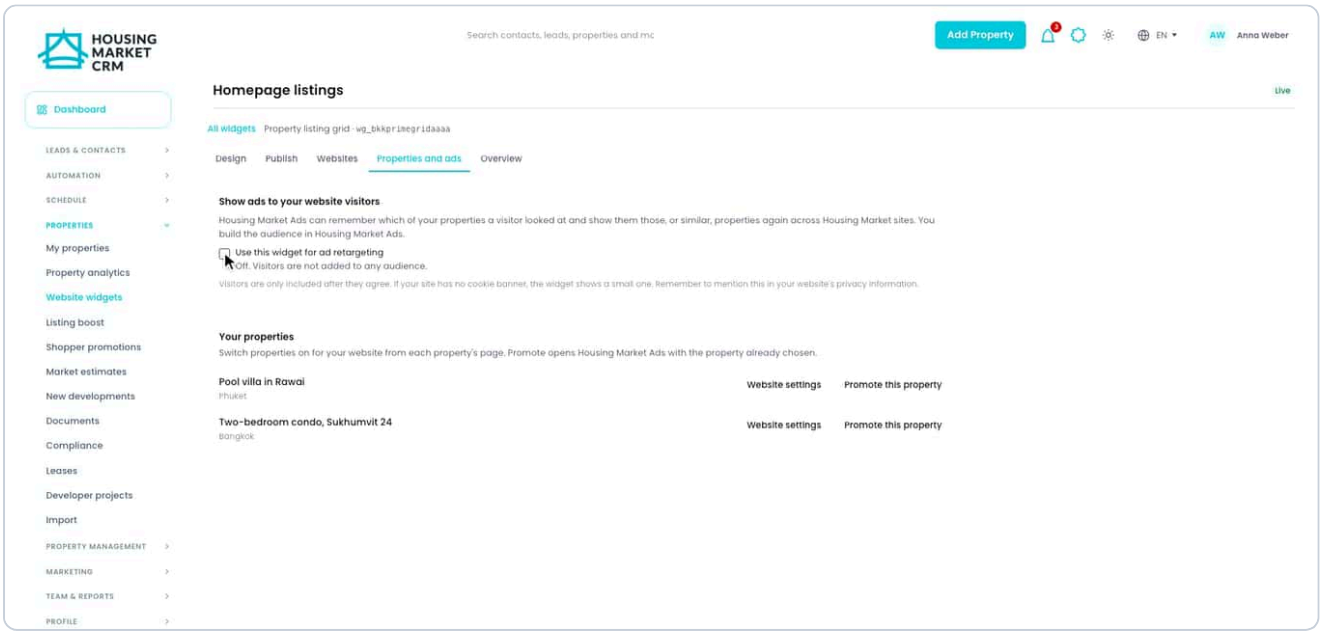


Figure 163.14 · Screen recorded 24 October 2026

RELATED HELP CENTER ARTICLES

Does the CRM work with Housing Market Ads?	faq.housingmarketgroup.com/faq/does-the-crm-work-with-housing-market-ads

164 CHAPTER 164

Promote a property with Ads from your widgets

Pro and Business | For agents who want their properties on their own website | Watch the video

TODO No Help Center article covers this task yet, so this chapter has no explanation. Write the article, then map it in packages/handbooks/src/products/crm.ts. (The Properties and ads tab, Promote this property, opens the Advertise page; nothing is spent in the video; Pro.)

STEP BY STEP

1 This is your **Housing Market CRM** dashboard.

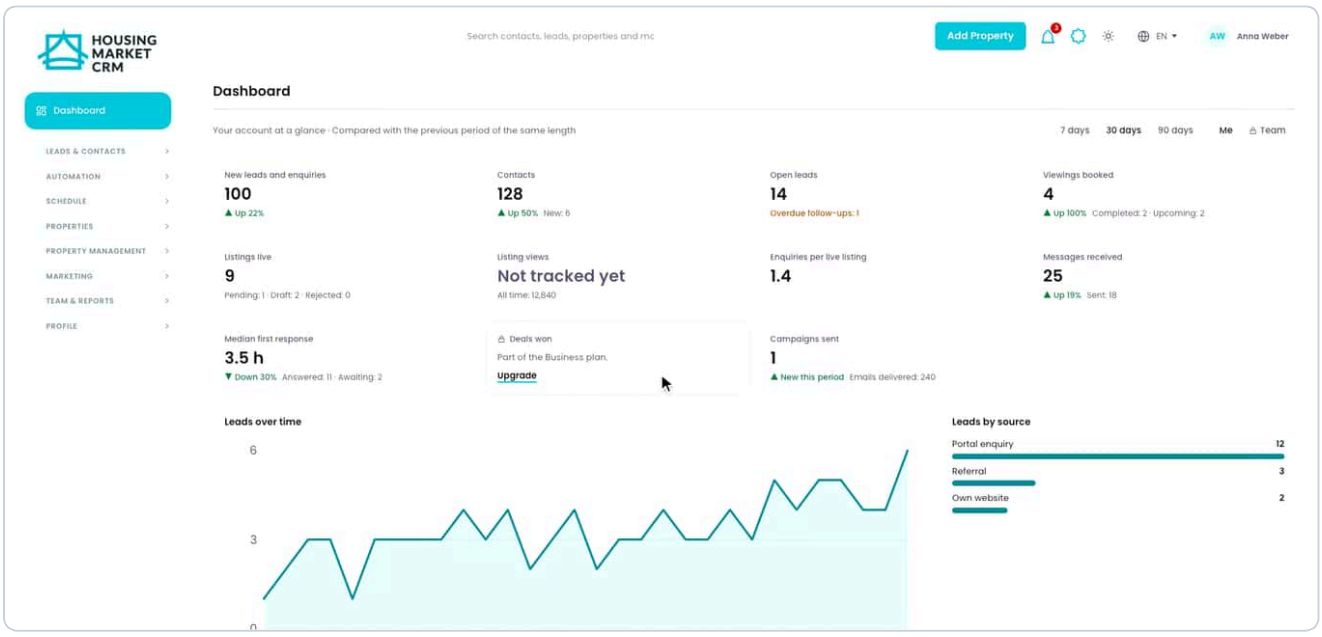


Figure 164.1 · Screen recorded 24 October 2026

2 Open **Properties** in the left menu.

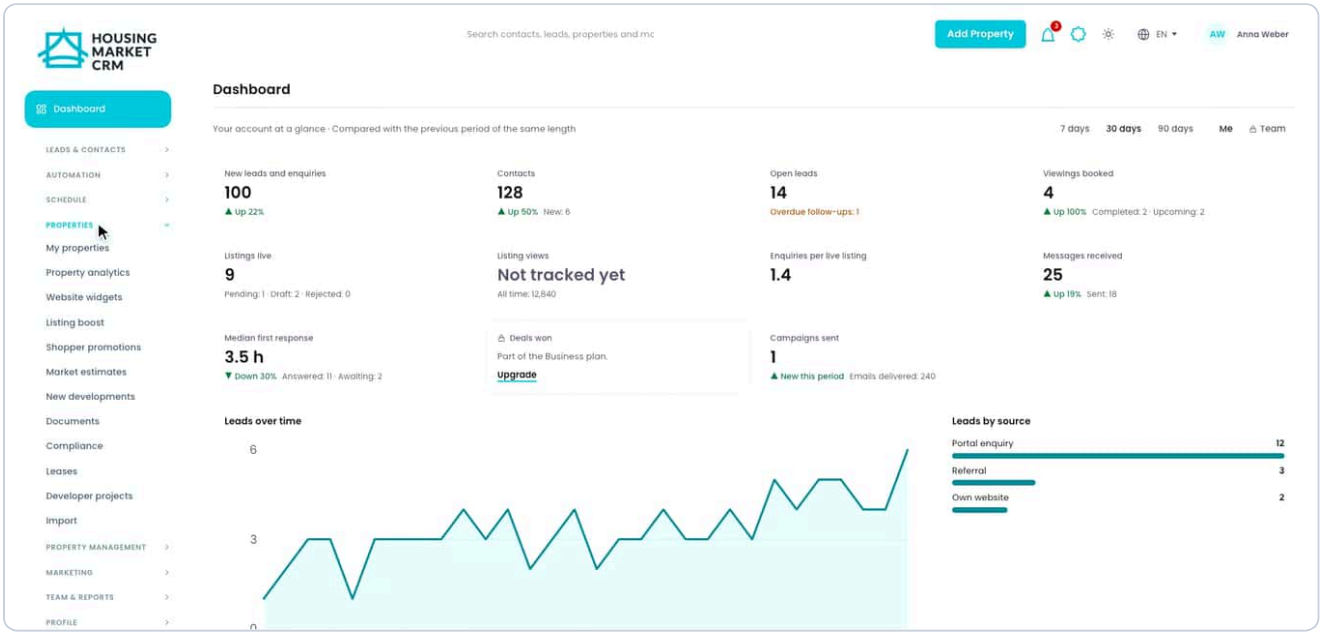


Figure 164.2 · Screen recorded 24 October 2026

3 Click **Website widgets**.

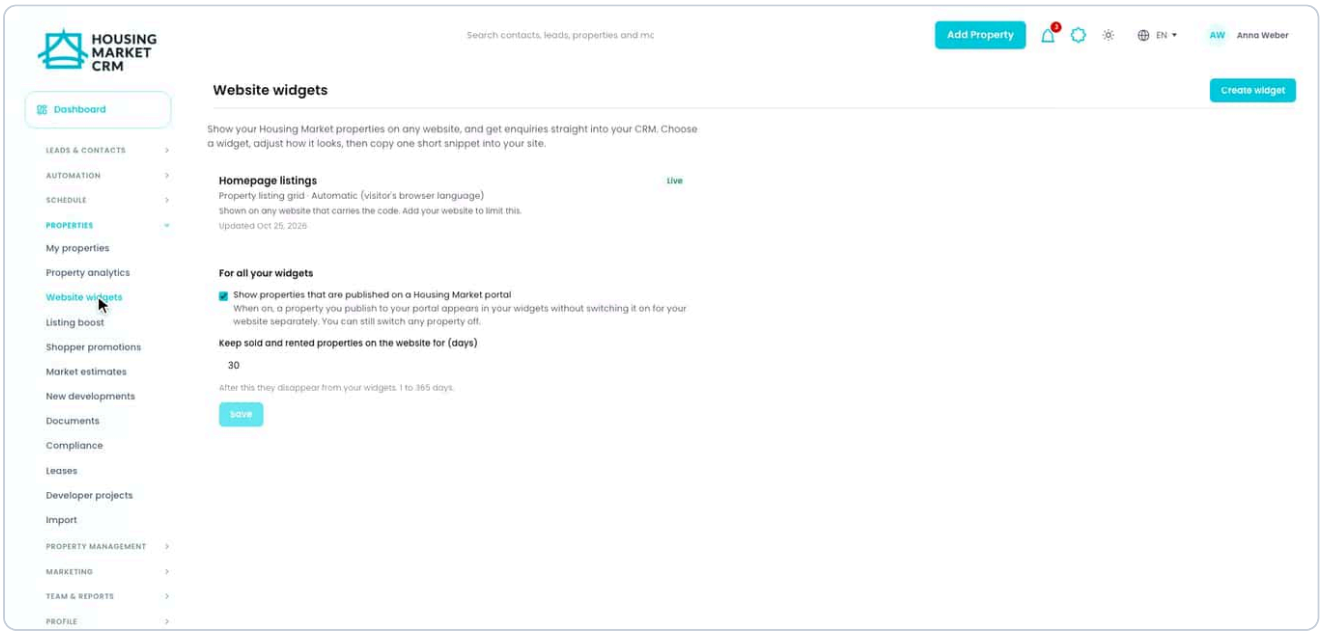


Figure 164.3 · Screen recorded 24 October 2026

4 Open **Homepage listings**.

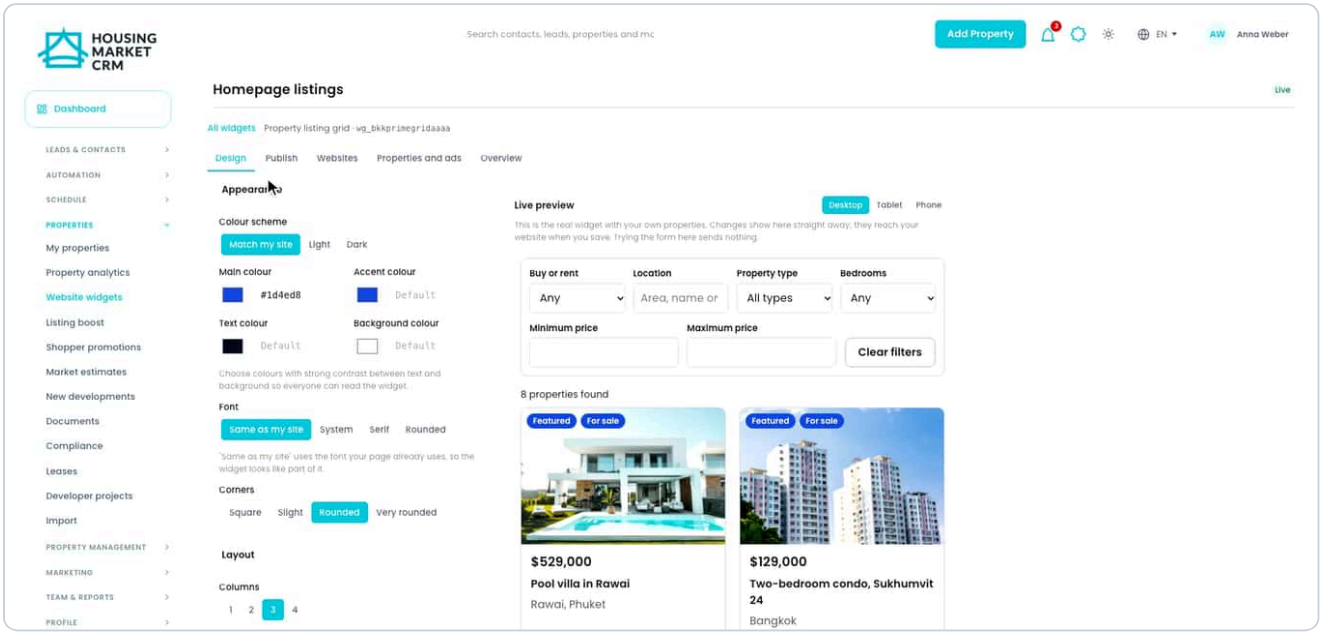


Figure 164.4 · Screen recorded 24 October 2026

5 Open the **Properties and ads** tab.

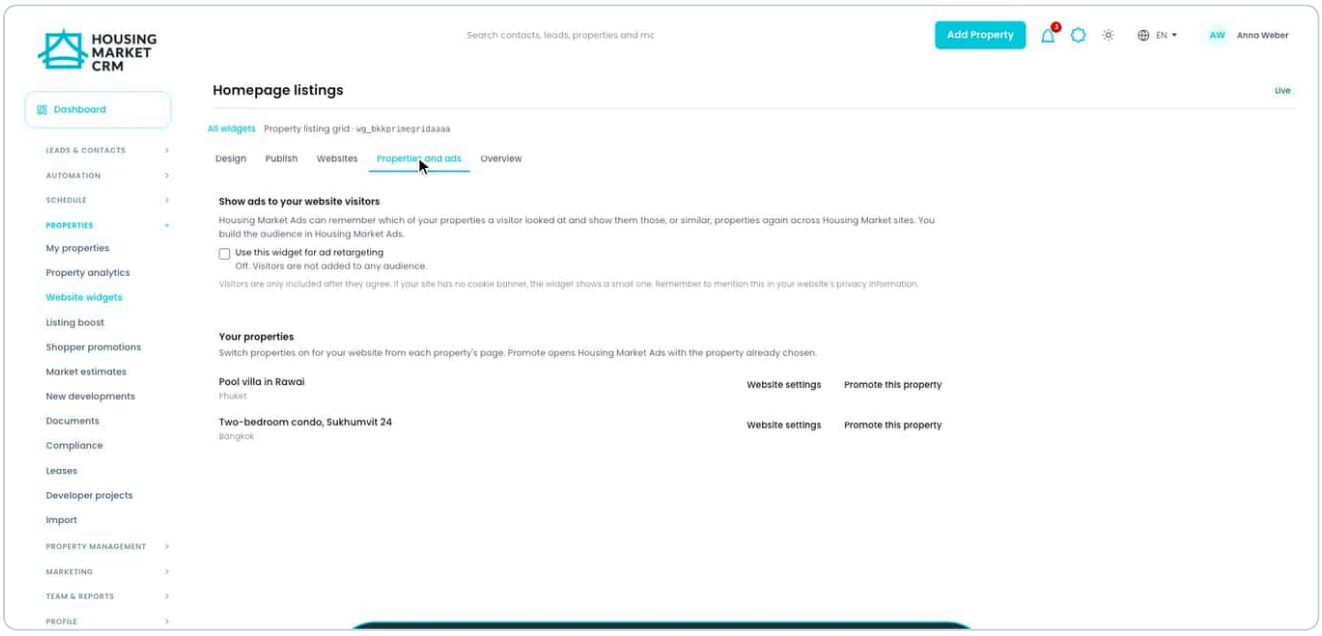


Figure 164.5 · Screen recorded 24 October 2026

6 Below retargeting, **Your properties** lists every property you have.

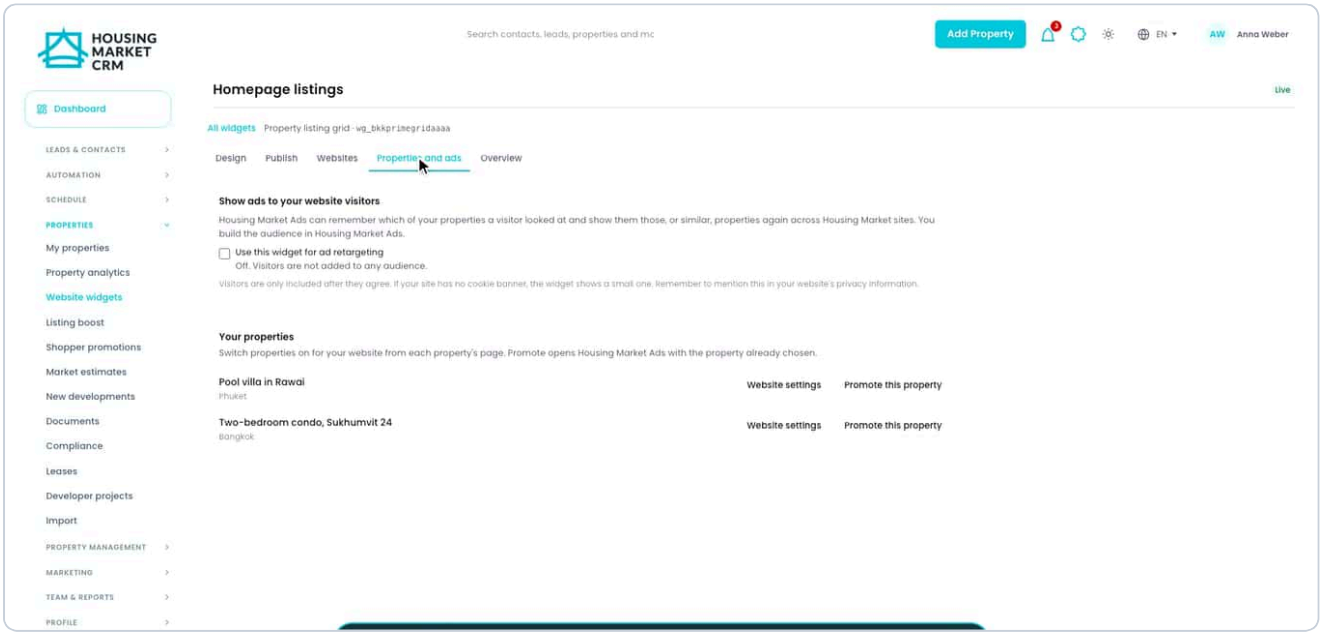


Figure 164.6 · Screen recorded 24 October 2026

7 **Website settings** opens the property, where you switch it on or off for your website.

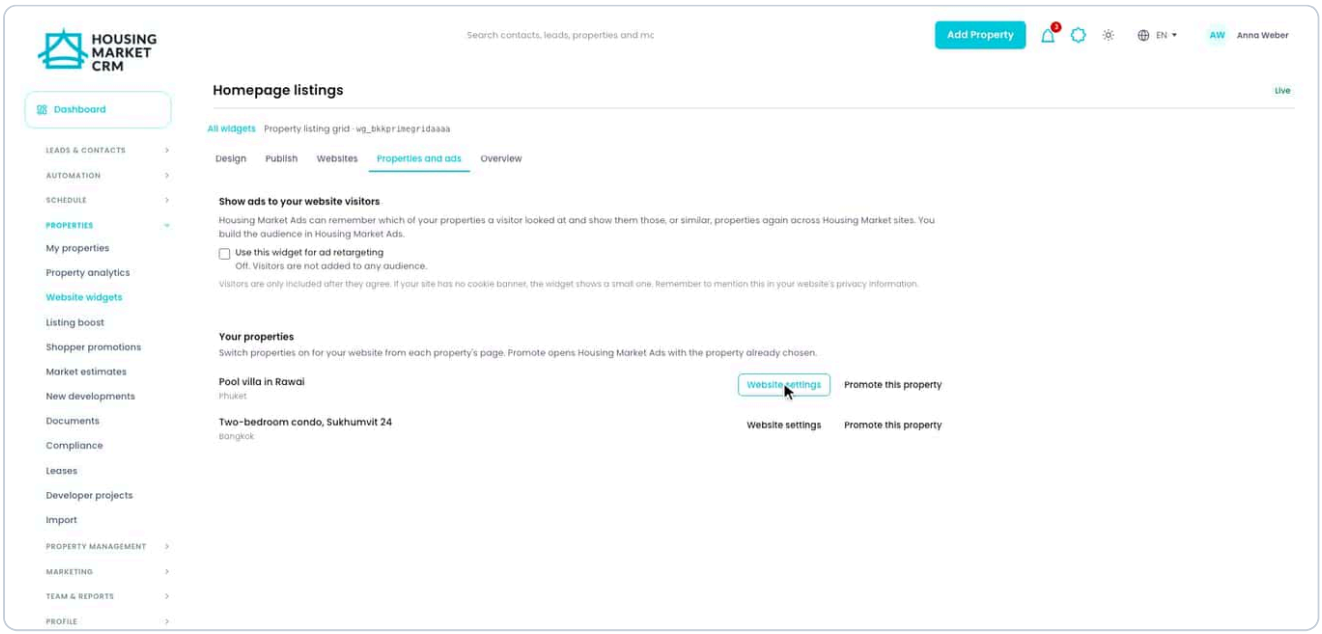


Figure 164.7 · Screen recorded 24 October 2026

8 This condo is published on a Housing Market portal.

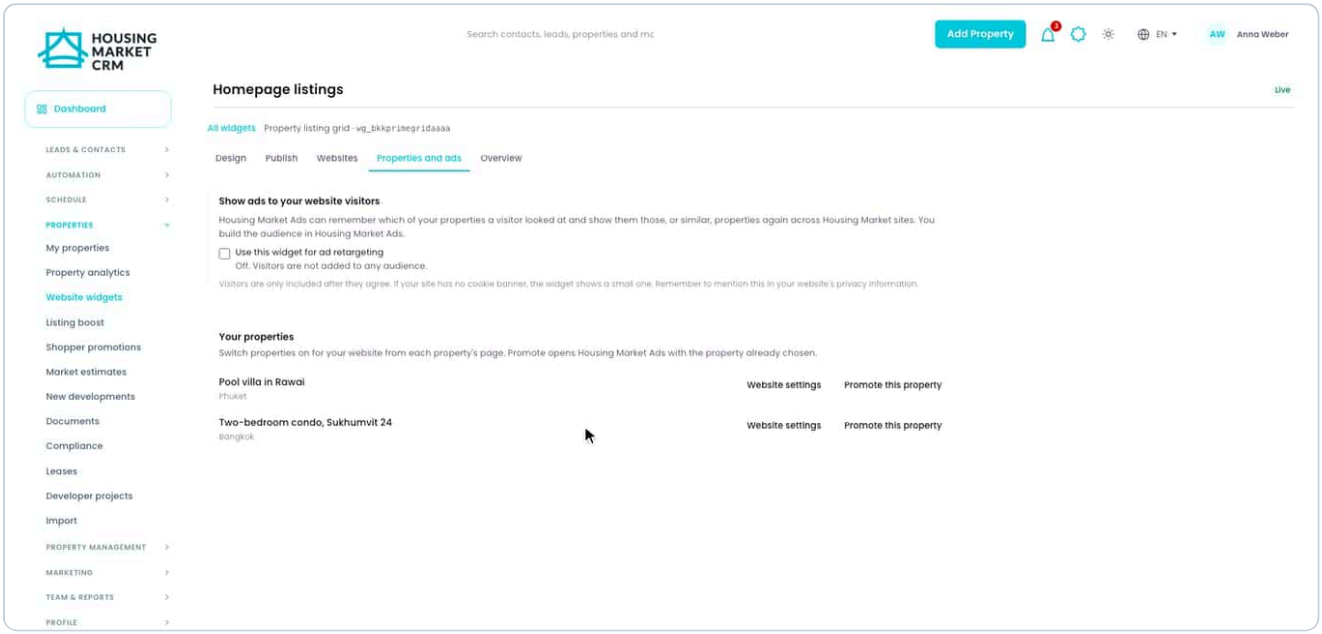


Figure 164.8 · Screen recorded 24 October 2026

9 Click **Promote this property**.

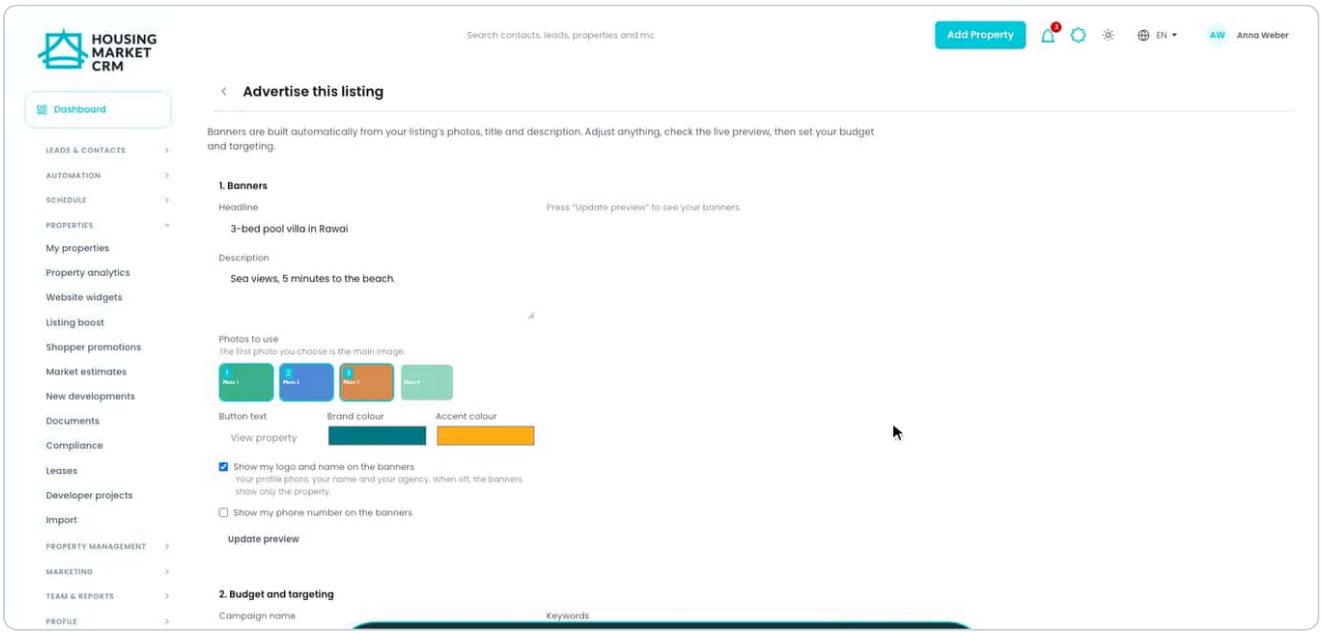


Figure 164.9 · Screen recorded 24 October 2026

10 **Housing Market Ads** opens with the property already chosen.

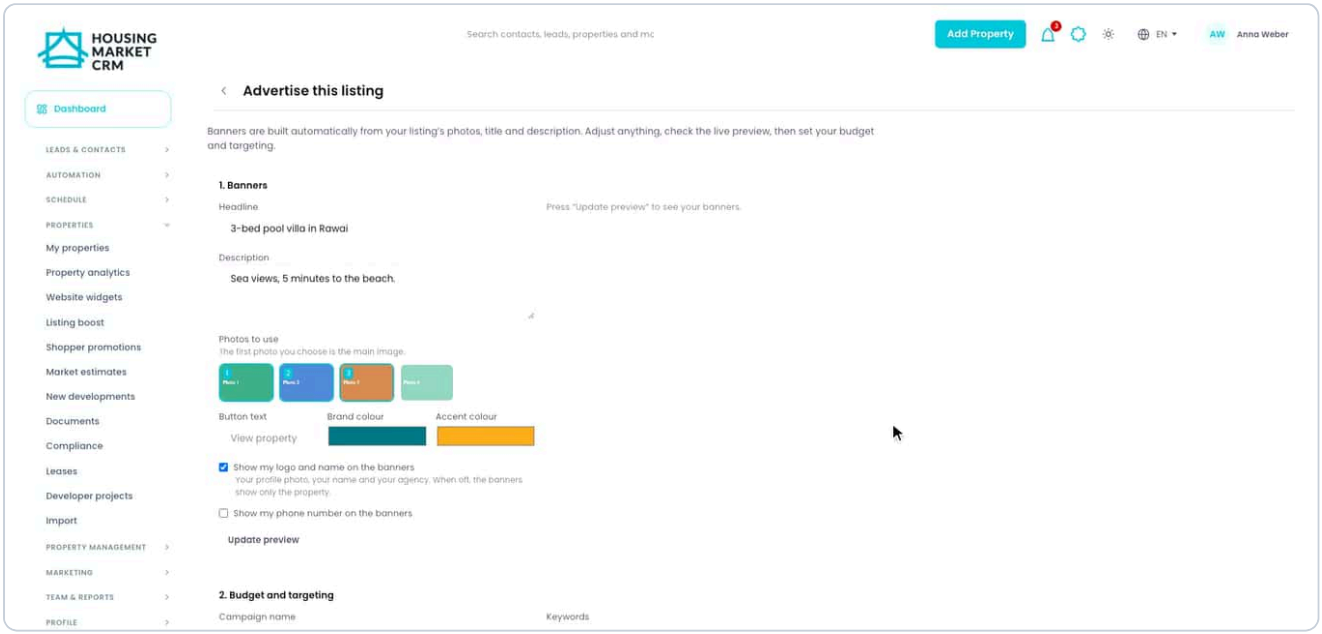


Figure 164.10 · Screen recorded 24 October 2026

11 The banners are built from its photos and text.

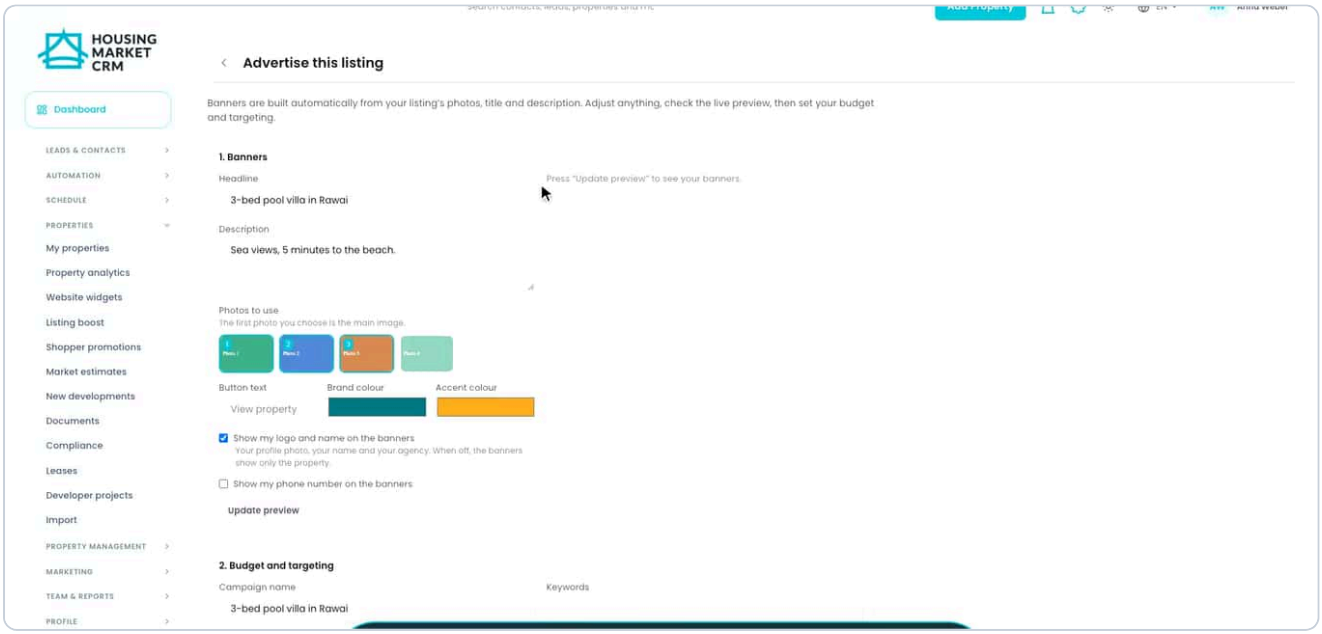


Figure 164.11 · Screen recorded 24 October 2026

12 Next you set a **budget** and **targeting**, as in the Ads tutorials.

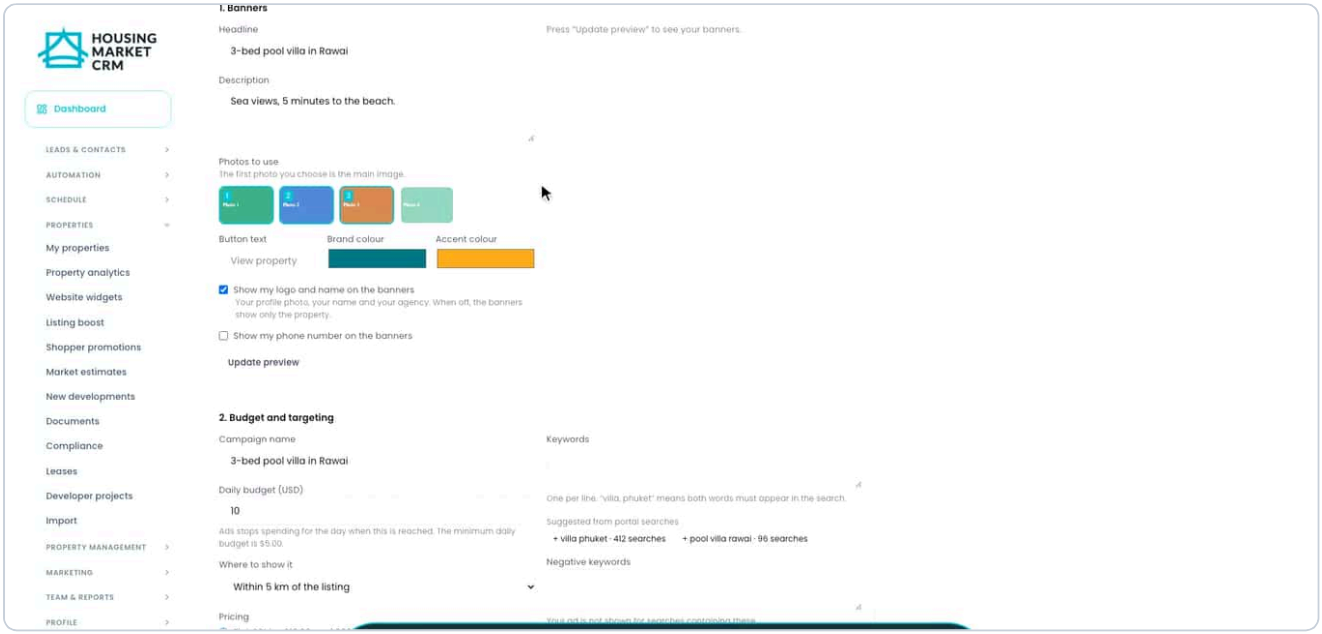


Figure 164.12 · Screen recorded 24 October 2026

RELATED HELP CENTER ARTICLES

Does the CRM work with Housing Market Ads?	faq.housingmarketgroup.com/faq/does-the-crm-work-with-housing-market-ads

165 CHAPTER 165

Widget enquiries become leads in the CRM

Business | For agents who want their properties on their own website | Watch the video

OVERVIEW

Each enquiry sent through the widget's form becomes a lead in Housing Market CRM, linked to the property, with the source "Website widget" and the name of your website.

When a visitor sends an enquiry from the widget, it is added to the Leads in your CRM as a new lead. The lead is linked to the property the visitor was looking at, its source is "Website widget", and it names the website it came from.

If the CRM cannot be reached at that moment, the enquiry from a real person is kept and sent again until it arrives. Spam protection runs on the form.

If an enquiry does not seem to arrive, look in Leads first, then check your notification settings in the CRM.

From the Help Center: **How do Website Widget enquiries reach my CRM?**

STEP BY STEP

1 A visitor opens the **Contact** page of your website. The **Enquiry form** widget is on it.

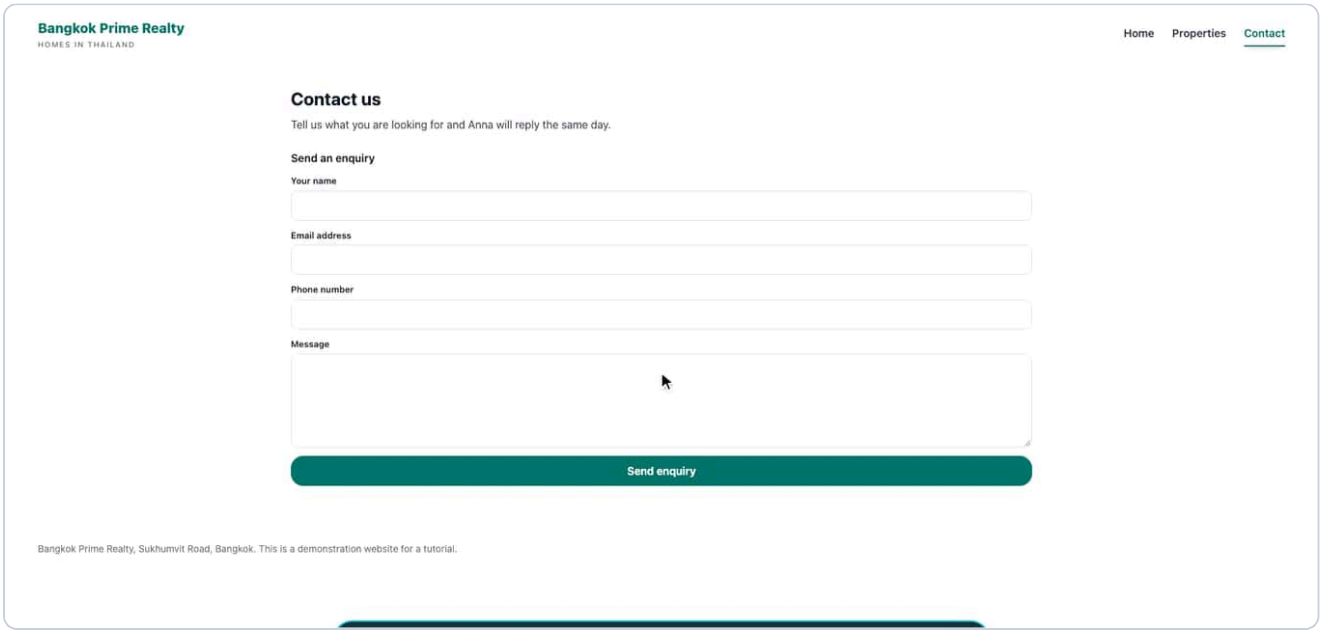


Figure 165.1 · Screen recorded 24 October 2026

2 They fill in their **name** their **email**.

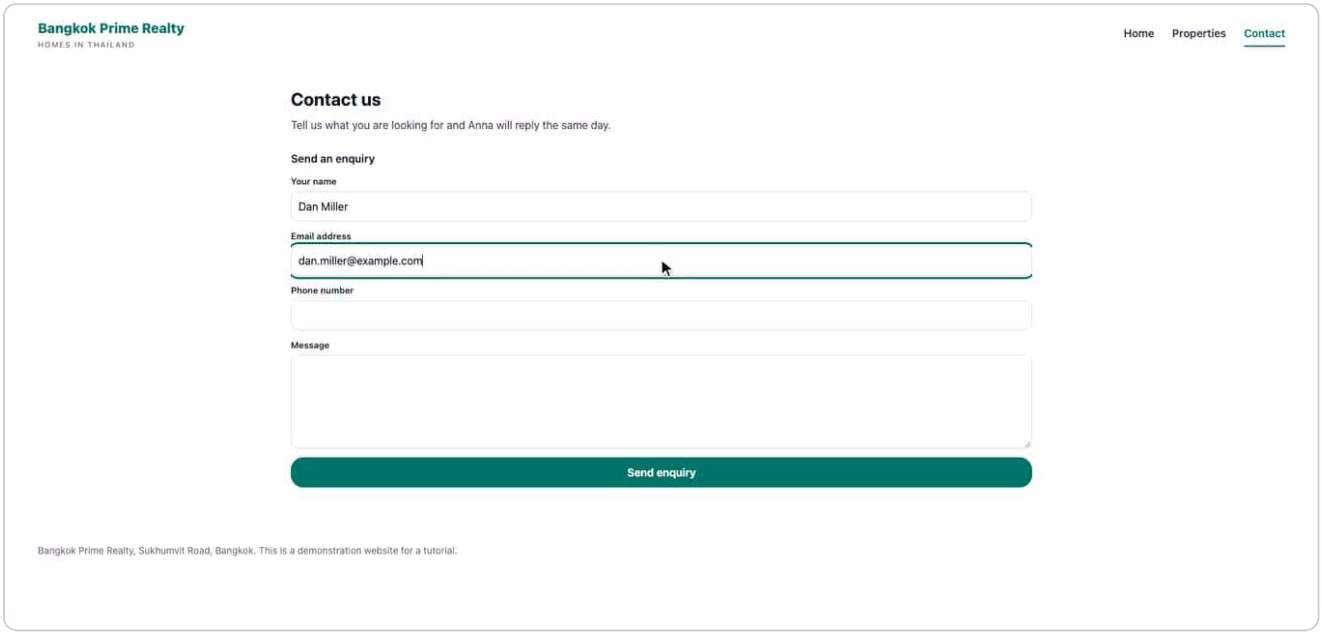


Figure 165.2 · Screen recorded 24 October 2026

3 their **phone number** and a **message**.

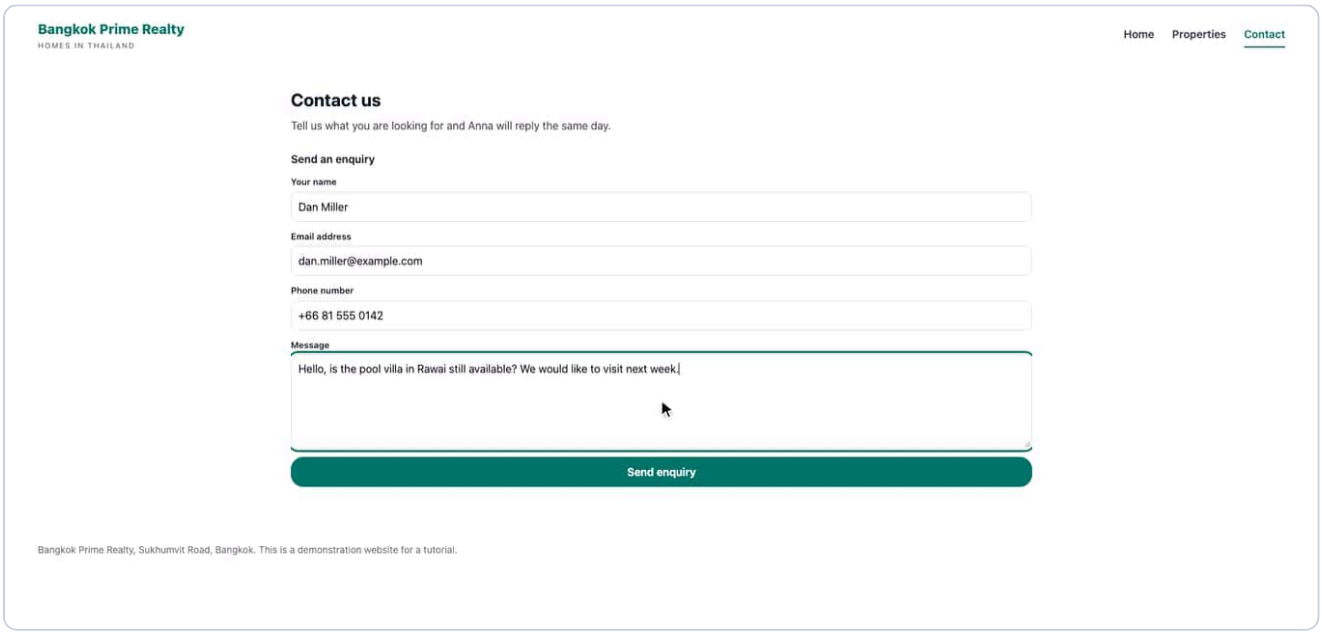


Figure 165.3 · Screen recorded 24 October 2026

4 They click **Send enquiry**.

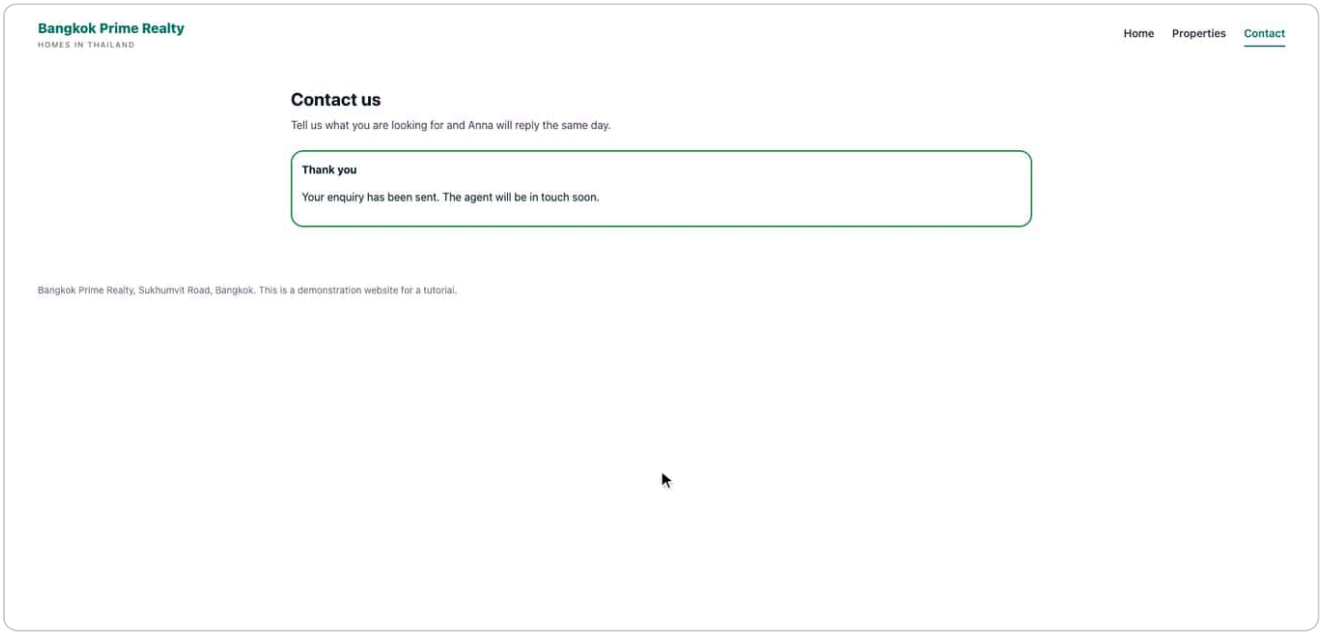


Figure 165.4 · Screen recorded 24 October 2026

5 The visitor sees a **thank you**. Their enquiry is already in your CRM.

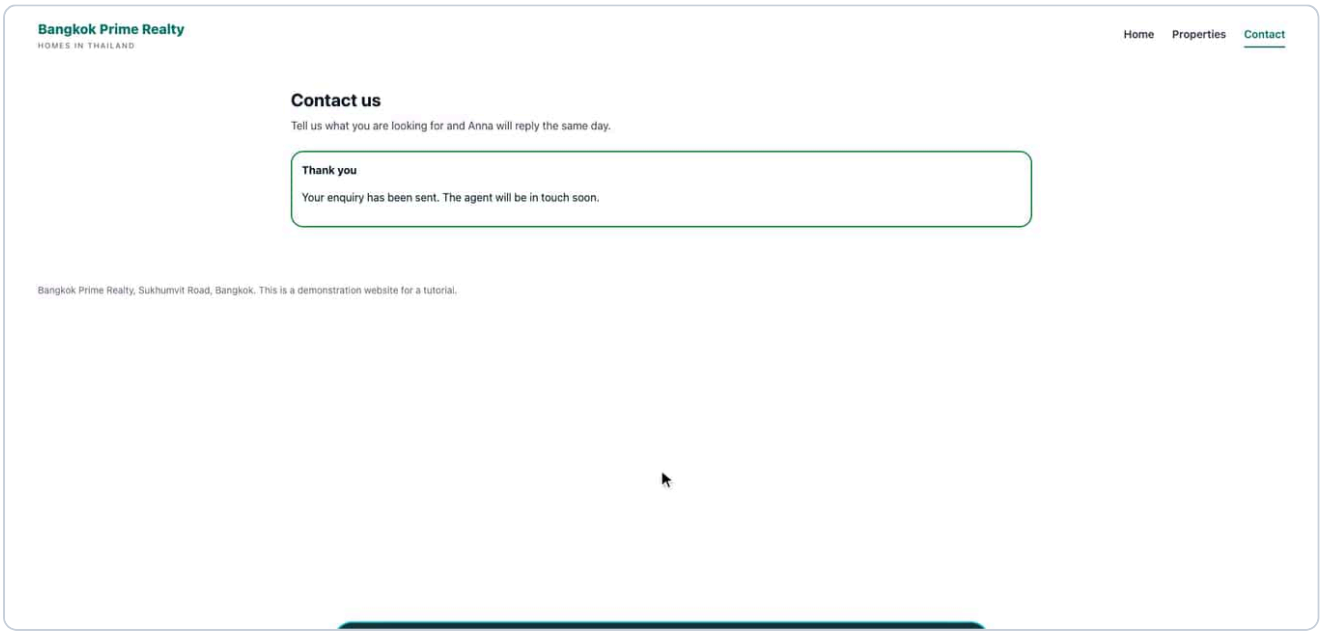


Figure 165.5 · Screen recorded 24 October 2026

6 In your CRM, open **Tasks**, your lead board.

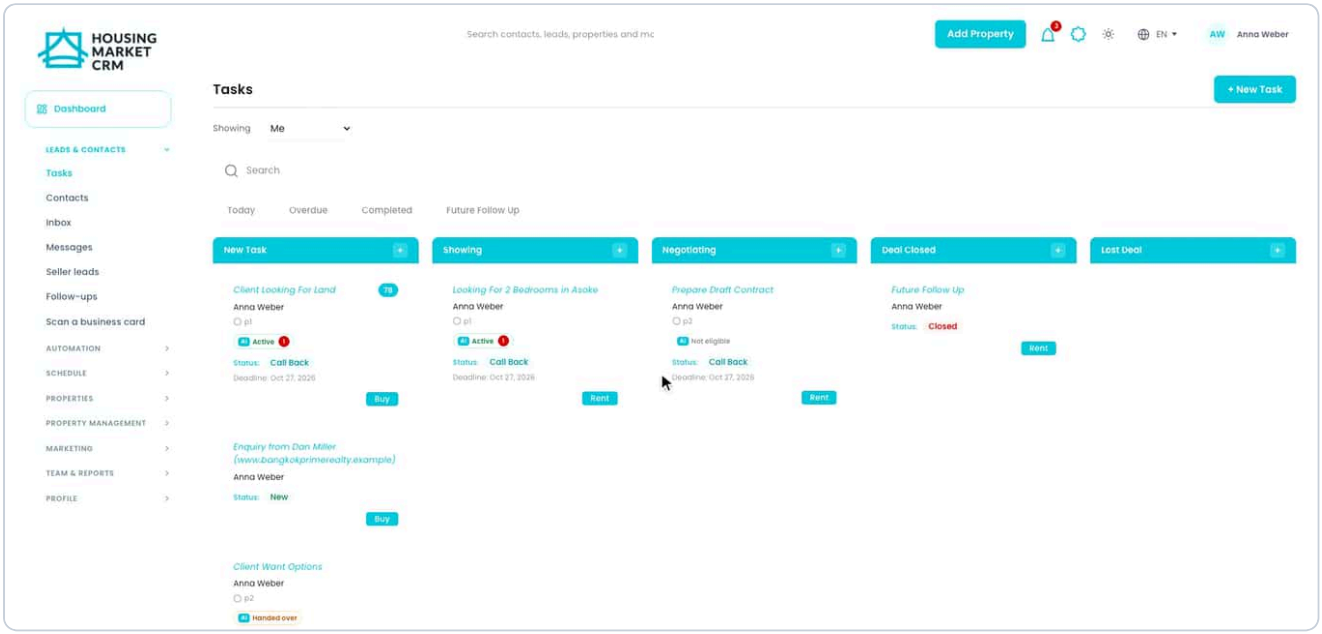


Figure 165.6 · Screen recorded 24 October 2026

7 The enquiry is already there as a **new lead**, with the website it came from.

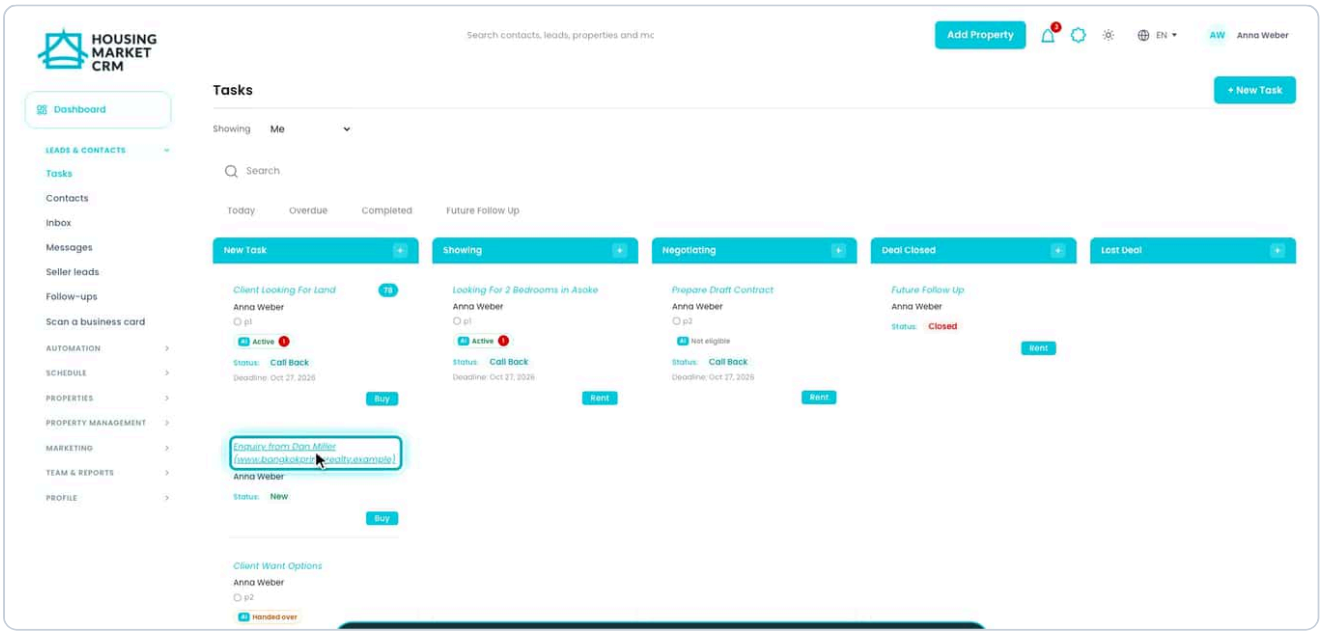


Figure 165.7 · Screen recorded 24 October 2026

8 Open it.

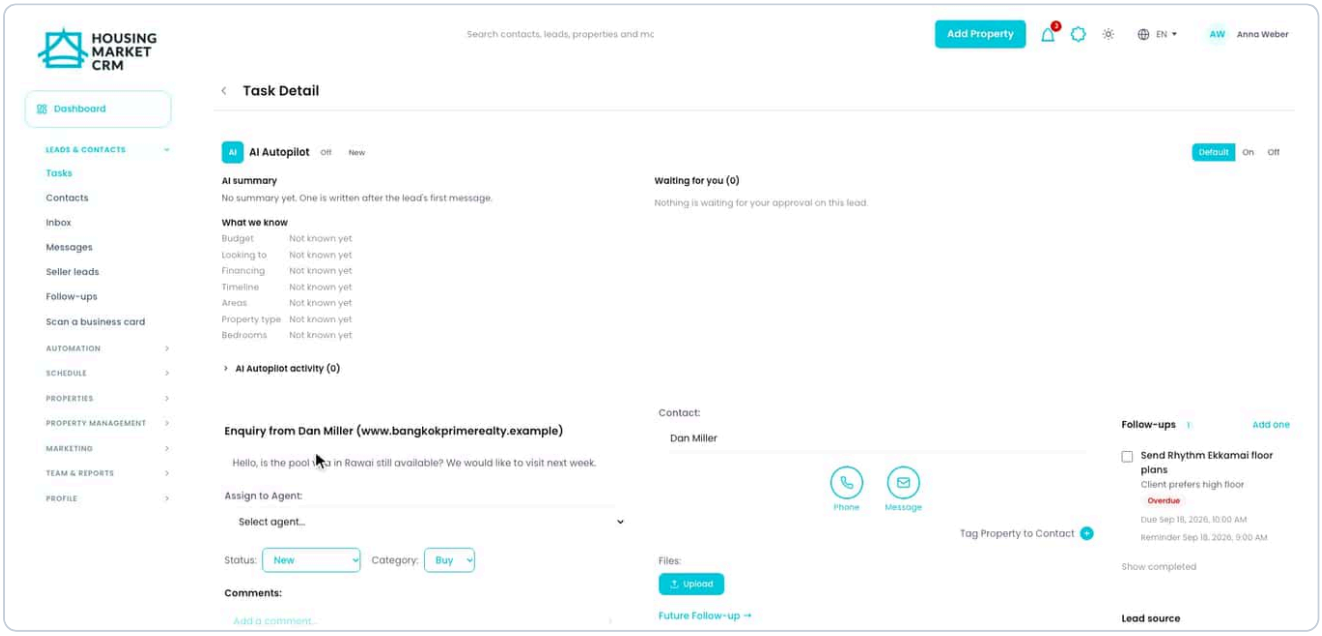


Figure 165.8 · Screen recorded 24 October 2026

9 The visitor's **message** is on the lead with their **phone** and **email**, so you can reply in one click.

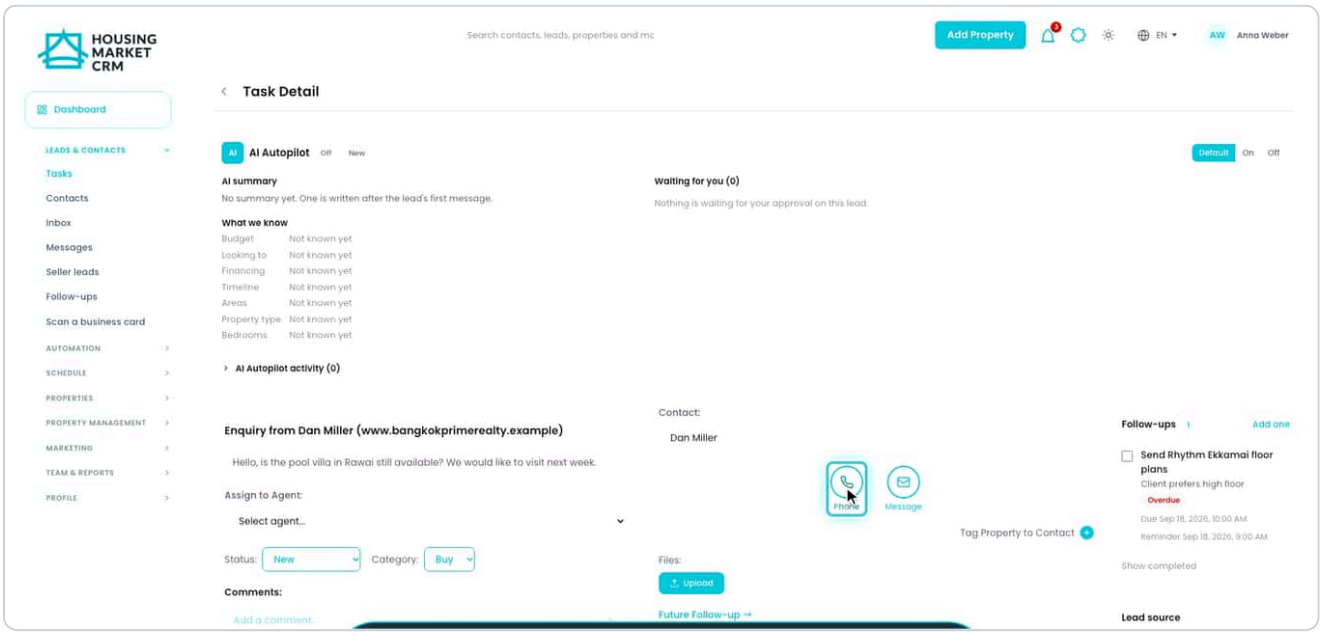


Figure 165.9 · Screen recorded 24 October 2026

10 The activity shows **where** the enquiry came from.

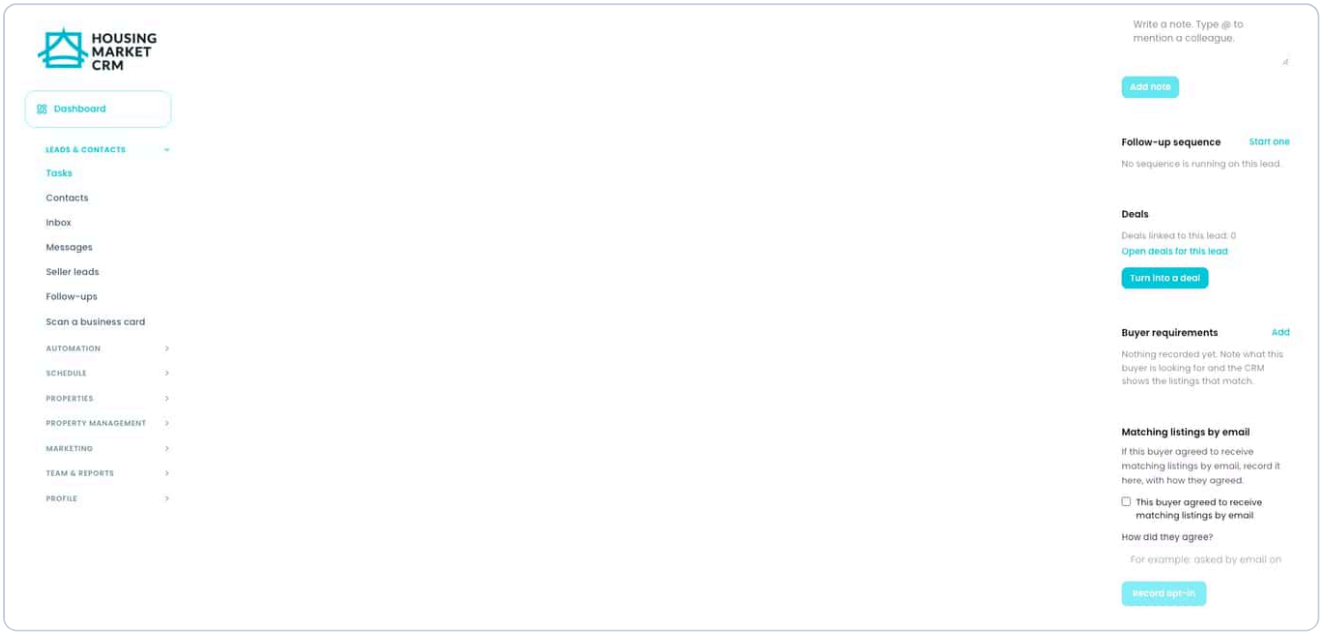


Figure 165.10 · Screen recorded 24 October 2026

11 Reply fast: you are **notified as usual** when a website enquiry arrives.

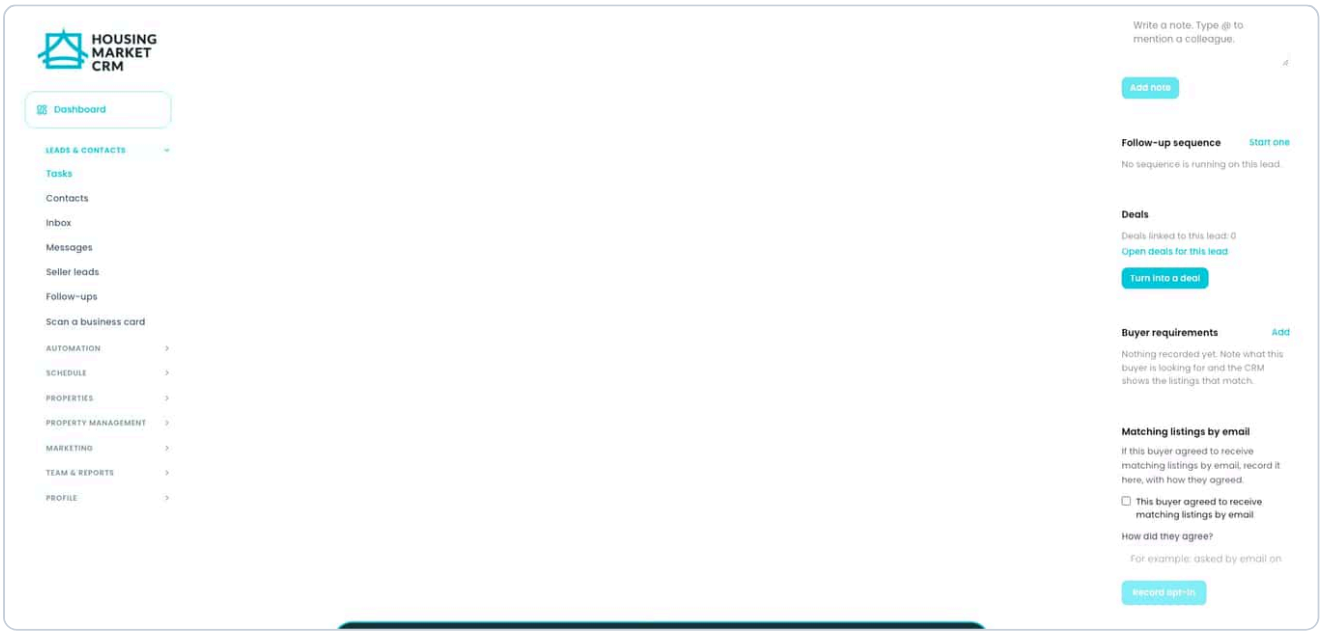


Figure 165.11 · Screen recorded 24 October 2026

RELATED HELP CENTER ARTICLES

How do lead forms for my website work?	faq.housingmarketgroup.com/faq/how-do-lead-forms-for-my-website-work
How are leads added to the CRM?	faq.housingmarketgroup.com/faq/how-are-leads-added-to-the-crm

166 CHAPTER 166

Import your listings from your website

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

Open Import existing listings and pick a spreadsheet, a feed, or your own website (beta). You review the listings first, and they land in My Properties.

In Housing Market CRM, open Import existing listings in the Properties menu. Pick where your listings are now, check what the CRM found, and confirm. You choose from three sources:

- A spreadsheet: a CSV, TSV or XLSX file. Column headings are recognised in several languages and you confirm which column is which. You can download a template. A one-time import from a file is free on every plan.
- A feed: Kyero, Property Finder, Bayut or Dubizzle, a RESO Web API, Zoopla, schema.org JSON-LD, RSS or GeoRSS, or a generic JSON or XML feed. Reading a feed once is free on every plan. Keeping a feed in sync automatically every day is a paid feature, and a sync never deletes anything.
- Your own website, the website crawl (beta, Business plan): it reads the listings from a website you have proved is yours. It obeys robots.txt, reads slowly and stops if your website refuses.

You review everything before it is imported. Imported properties land in My Properties as CRM-only: they are not published on a portal unless you choose to publish them and your plan allows it. Photos are copied across, importing again updates a property instead of duplicating it, and nothing is ever deleted.

From the Help Center: **How do I import my listings into Housing Market CRM?**

STEP BY STEP

1 This is your **Housing Market CRM** dashboard.

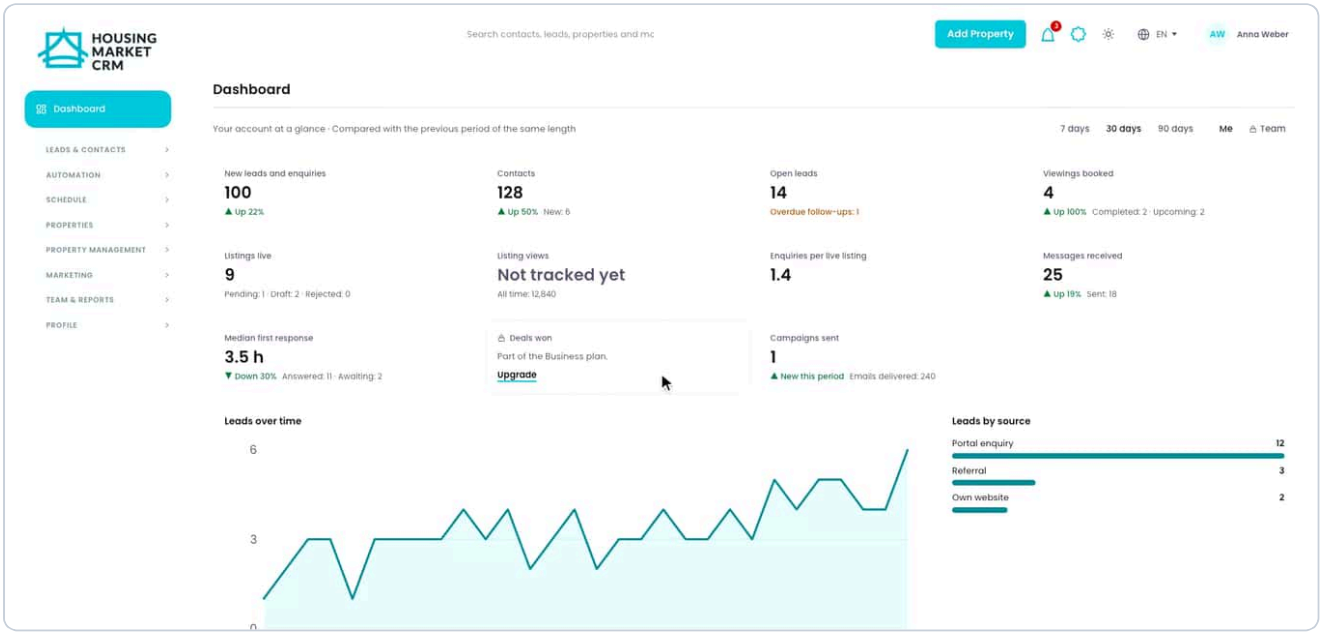


Figure 166.1 · Screen recorded 24 October 2026

2 Open **Properties** in the left menu.

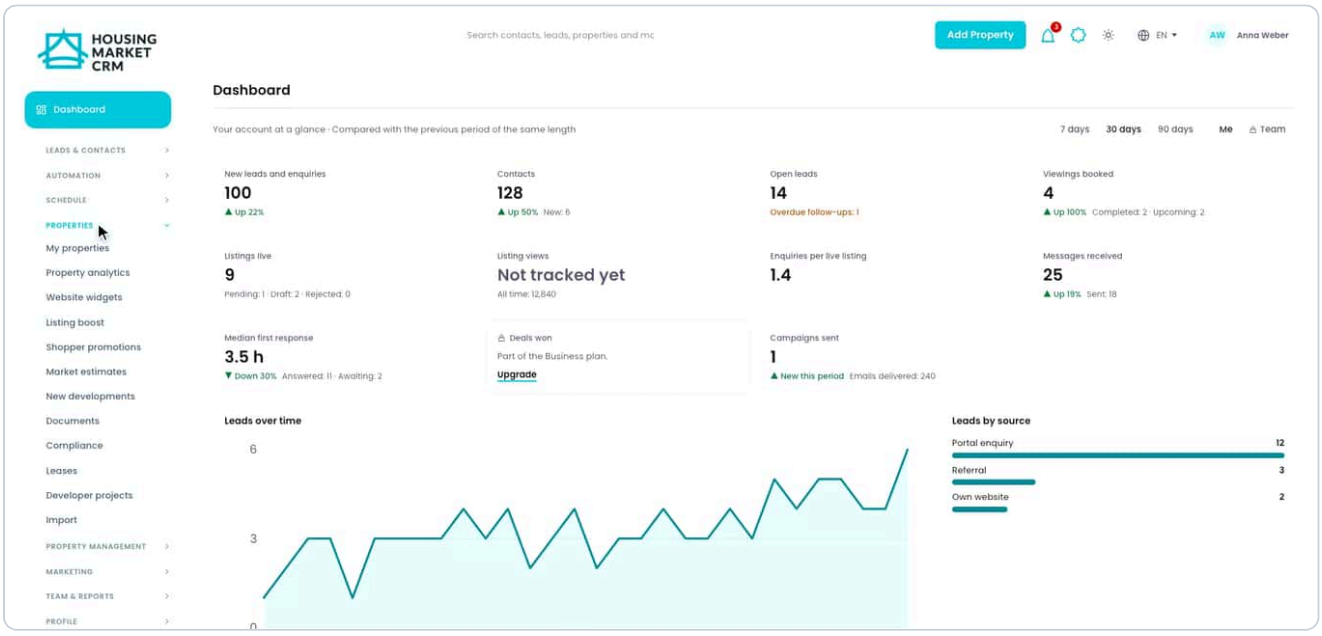


Figure 166.2 · Screen recorded 24 October 2026

3 Click **My properties.**

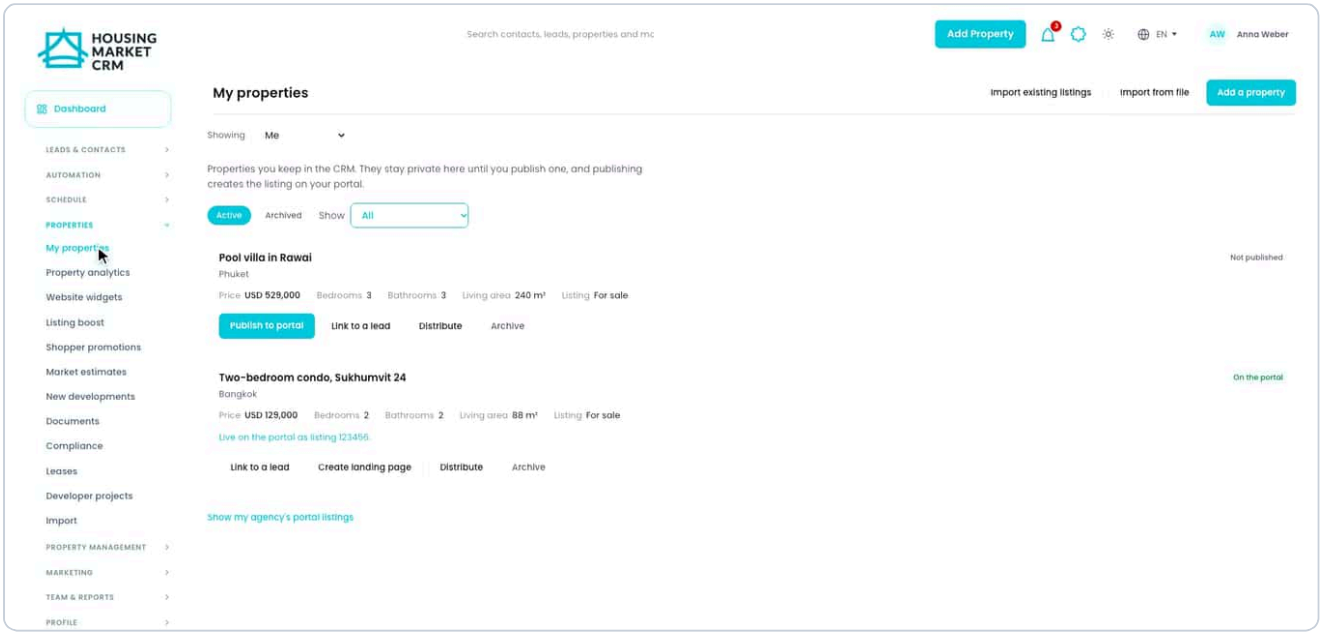


Figure 166.3 · Screen recorded 24 October 2026

4 Click **Import existing listings.**

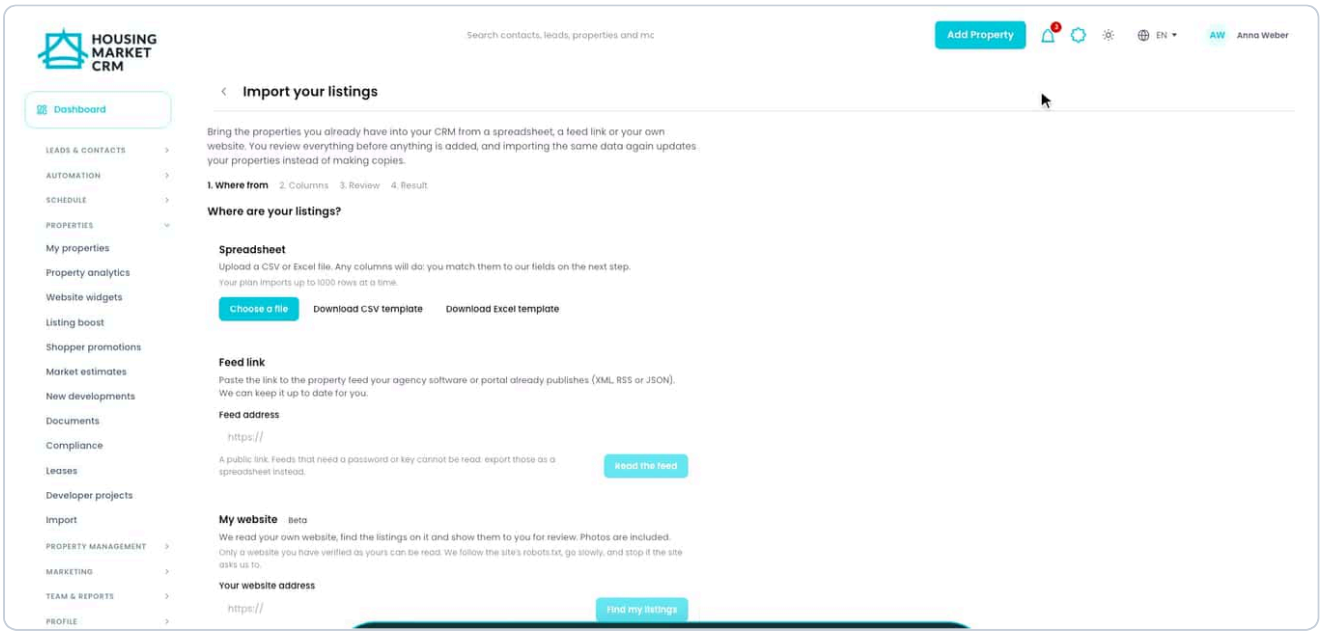


Figure 166.4 · Screen recorded 24 October 2026

5 A **spreadsheet**: upload a CSV or Excel file and match your columns.

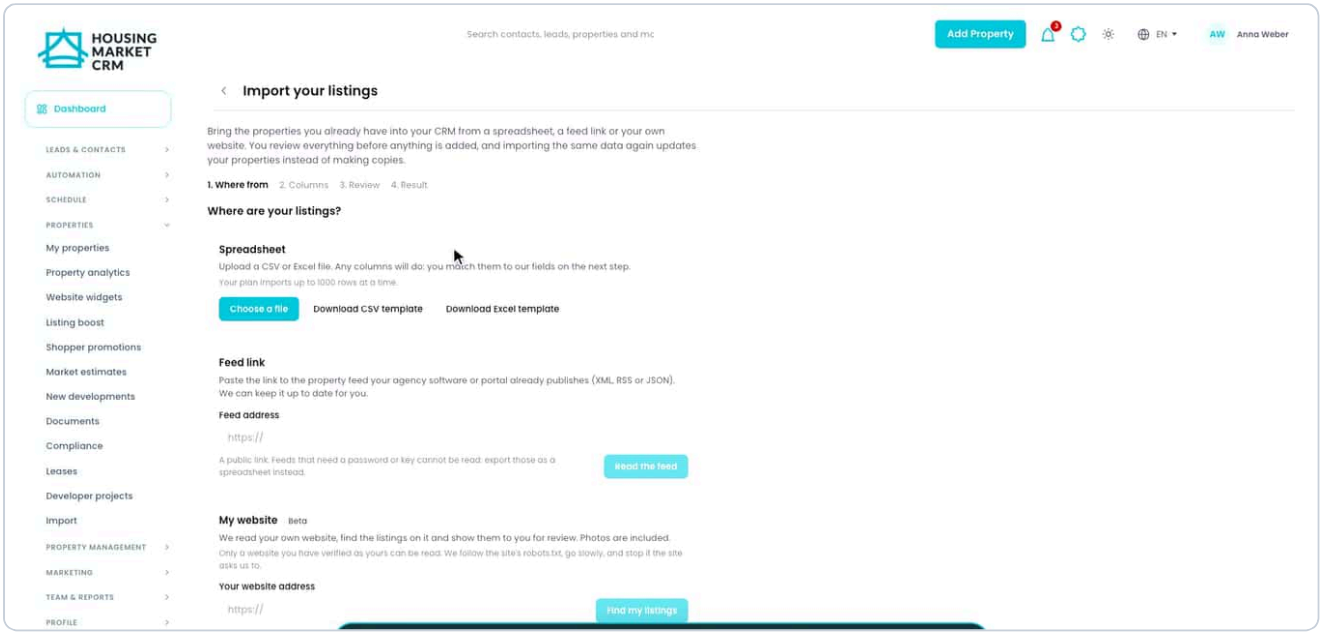


Figure 166.5 · Screen recorded 24 October 2026

6 A **feed link**: the property feed your agency software already publishes.

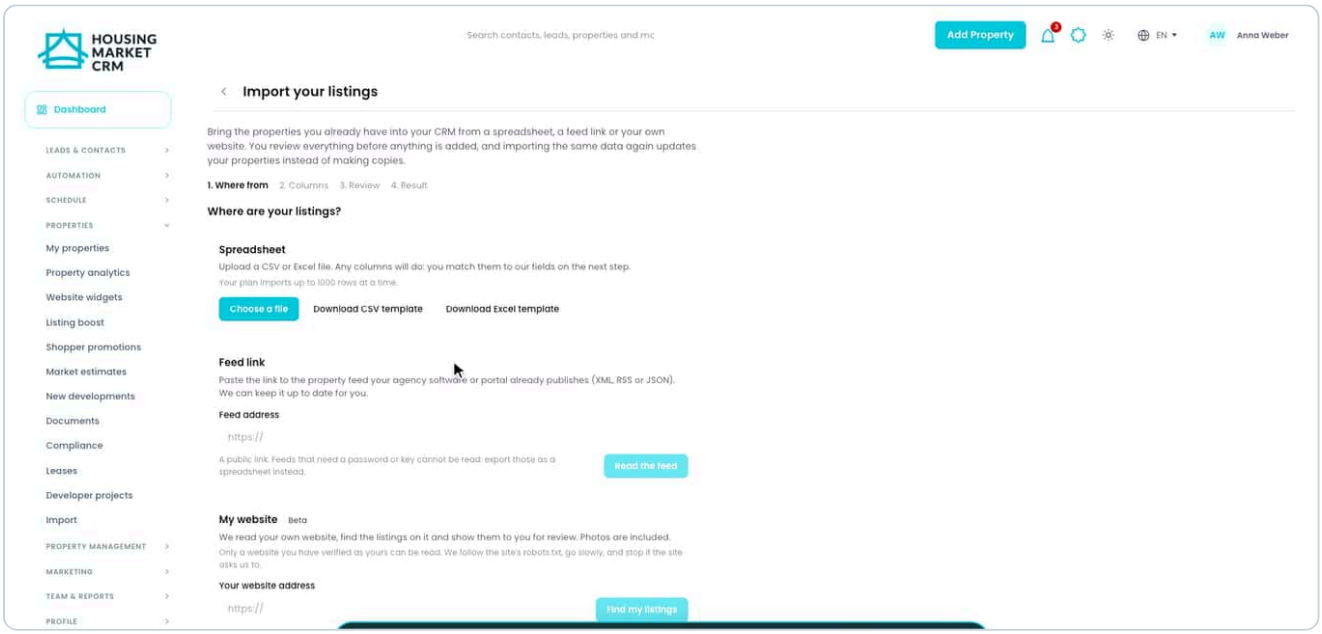


Figure 166.6 · Screen recorded 24 October 2026

7 Or **My website**: the CRM reads your own site and finds the listings on it.

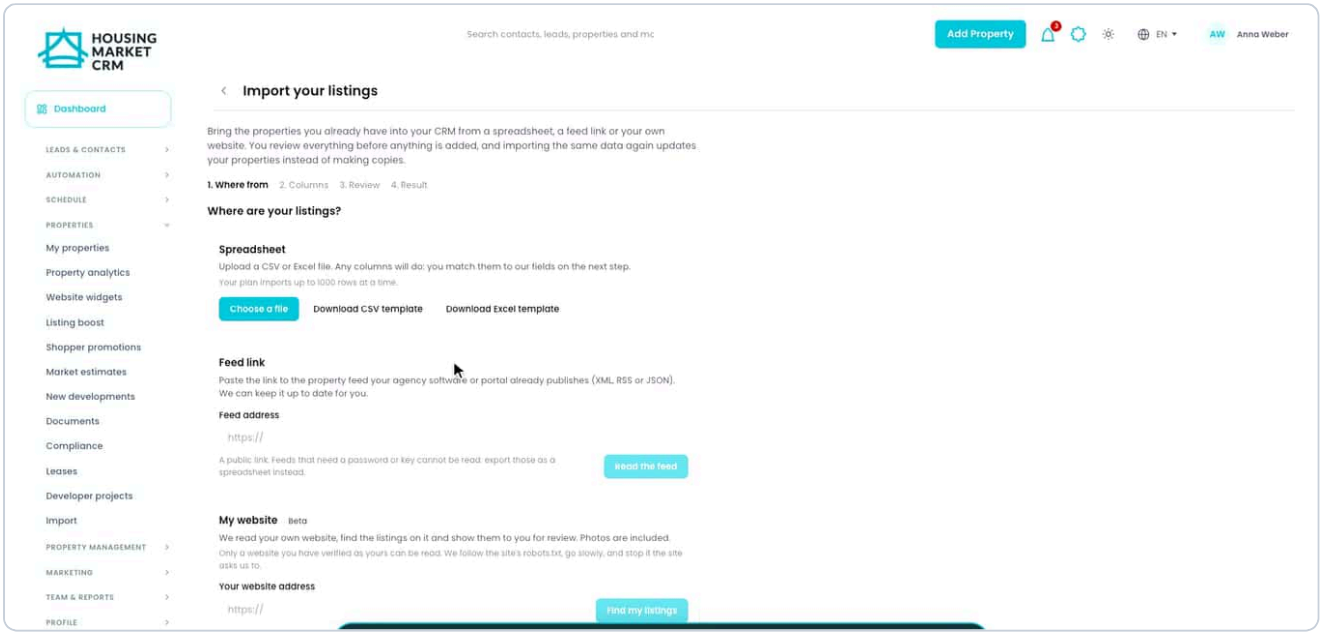


Figure 166.7 · Screen recorded 24 October 2026

8 Only a website you have **proven is yours** can be read, and it goes slowly and politely.

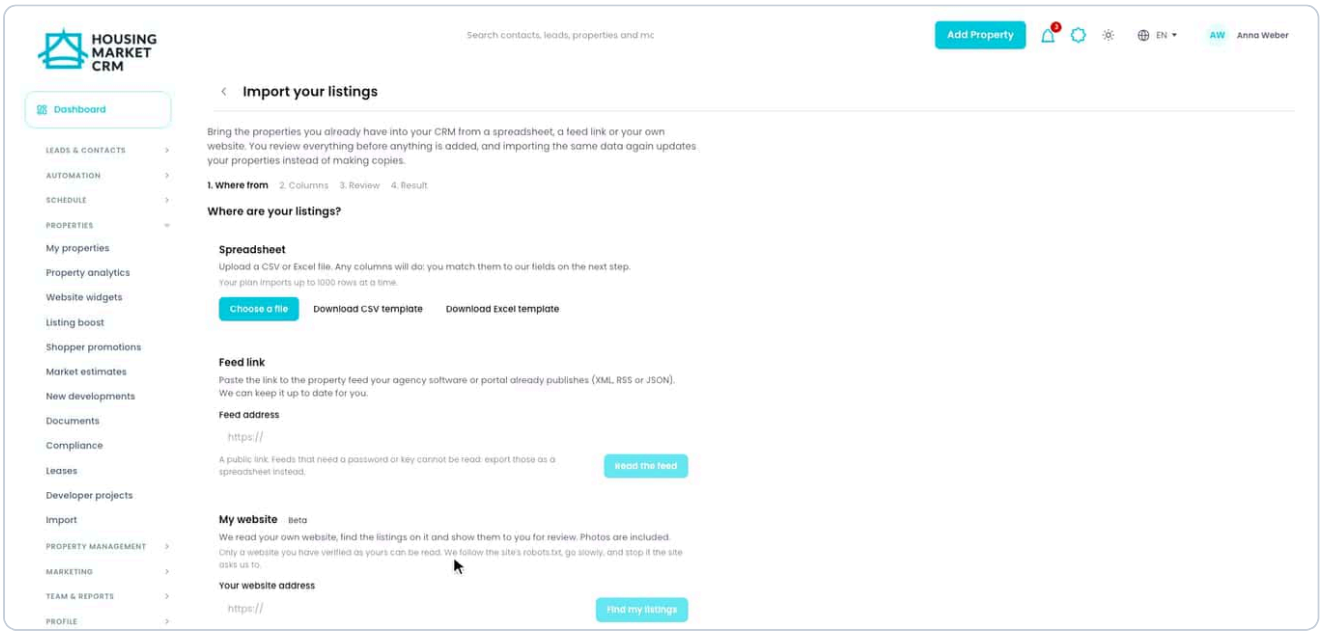


Figure 166.8 · Screen recorded 24 October 2026

9 Type your **website address.**

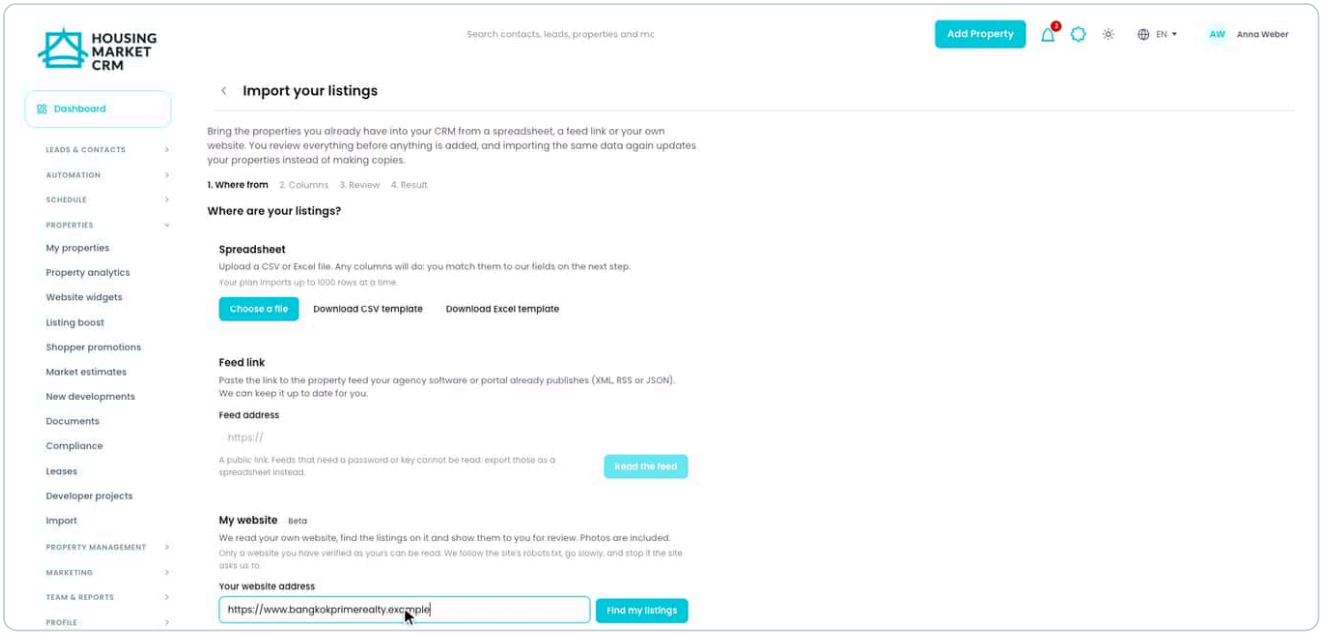


Figure 166.9 · Screen recorded 24 October 2026

10 Click **Find my listings.**

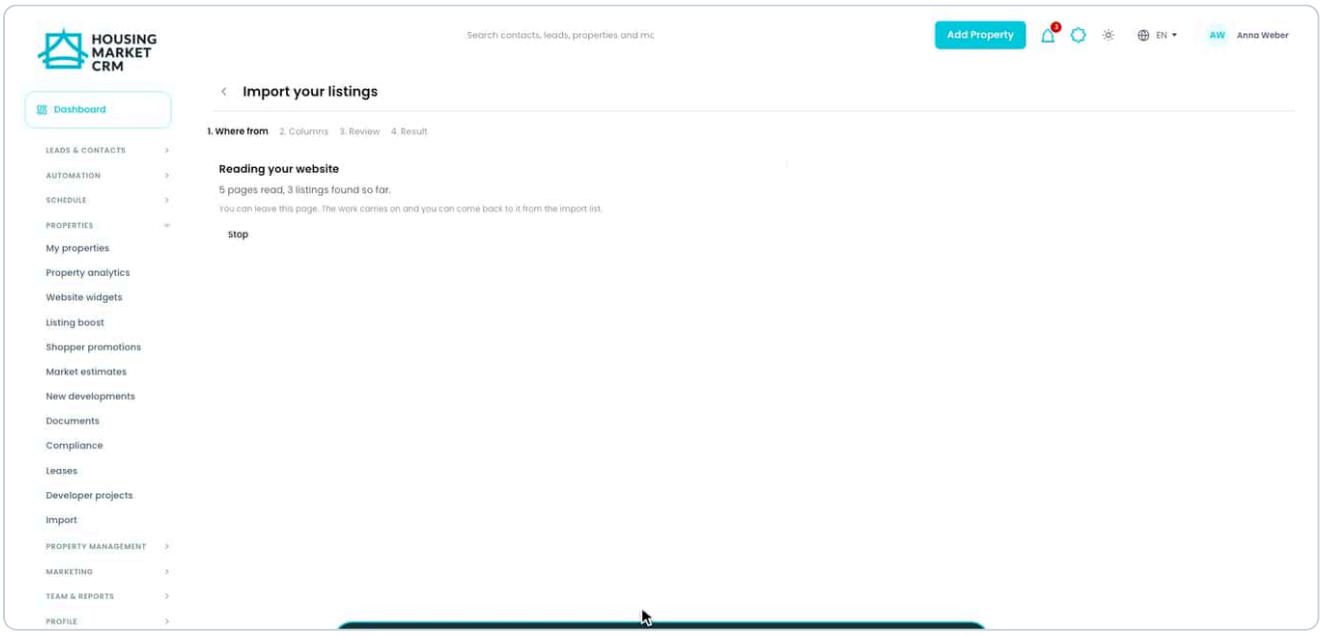


Figure 166.10 · Screen recorded 24 October 2026

11 The CRM reads your pages. You can **leave this page**: the work carries on.

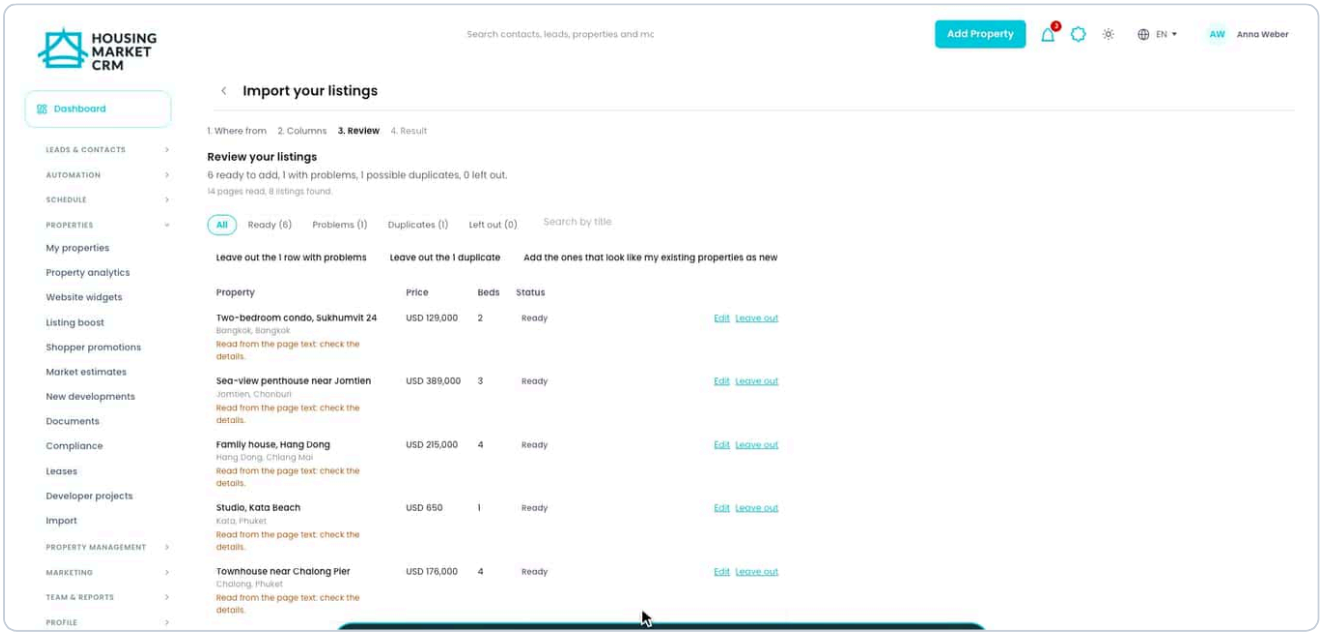


Figure 166.11 · Screen recorded 24 October 2026

12 Nothing is added yet. Here is **what was found**: ready, with problems, possible duplicates.

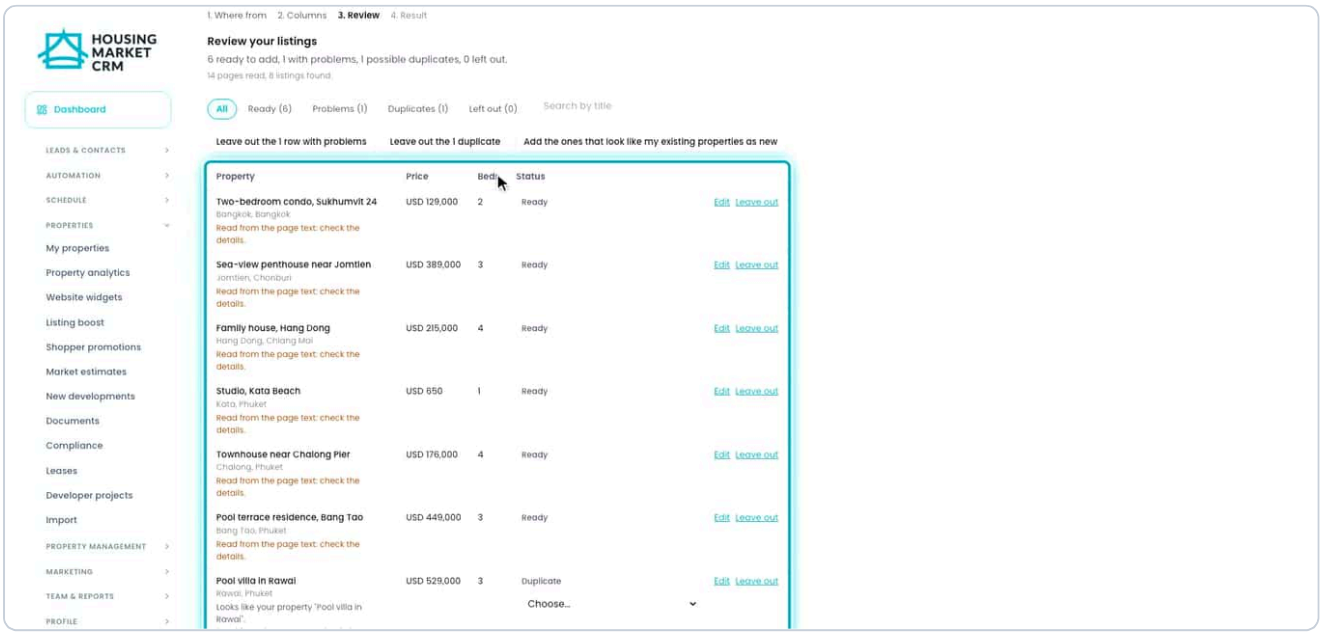


Figure 166.12 · Screen recorded 24 October 2026

13 Each listing shows its **price**, **bedrooms** and **status**.

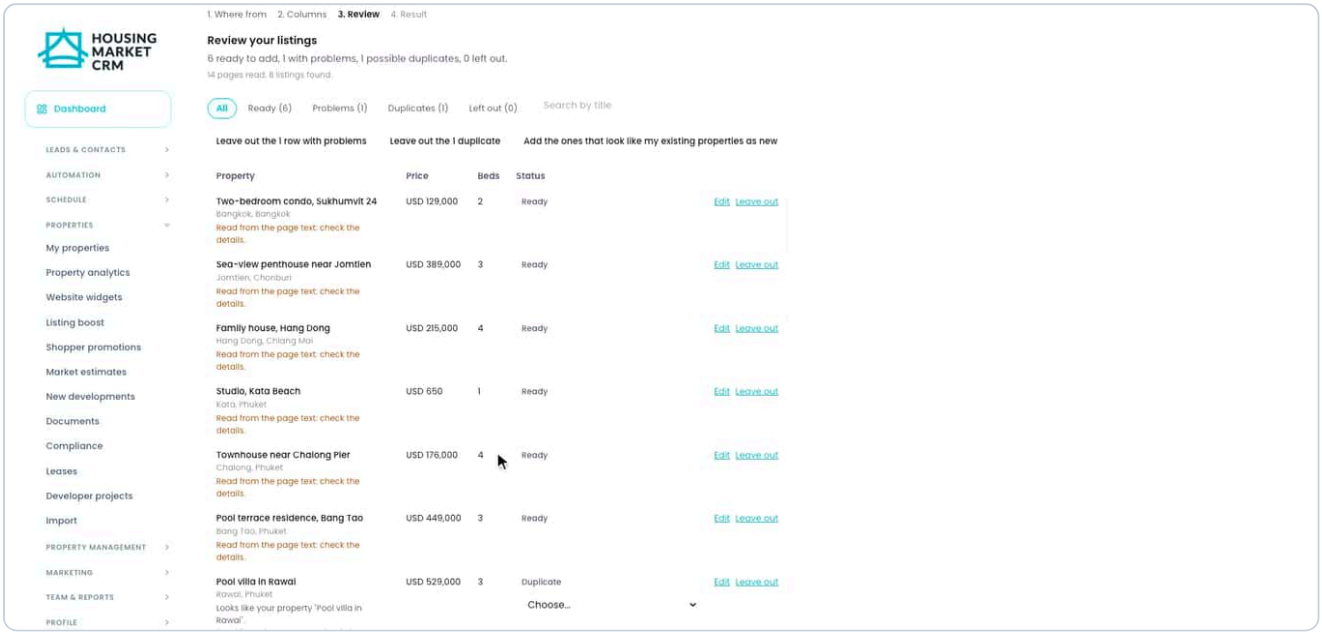


Figure 166.13 · Screen recorded 24 October 2026

14 Filter to the **possible duplicates**.

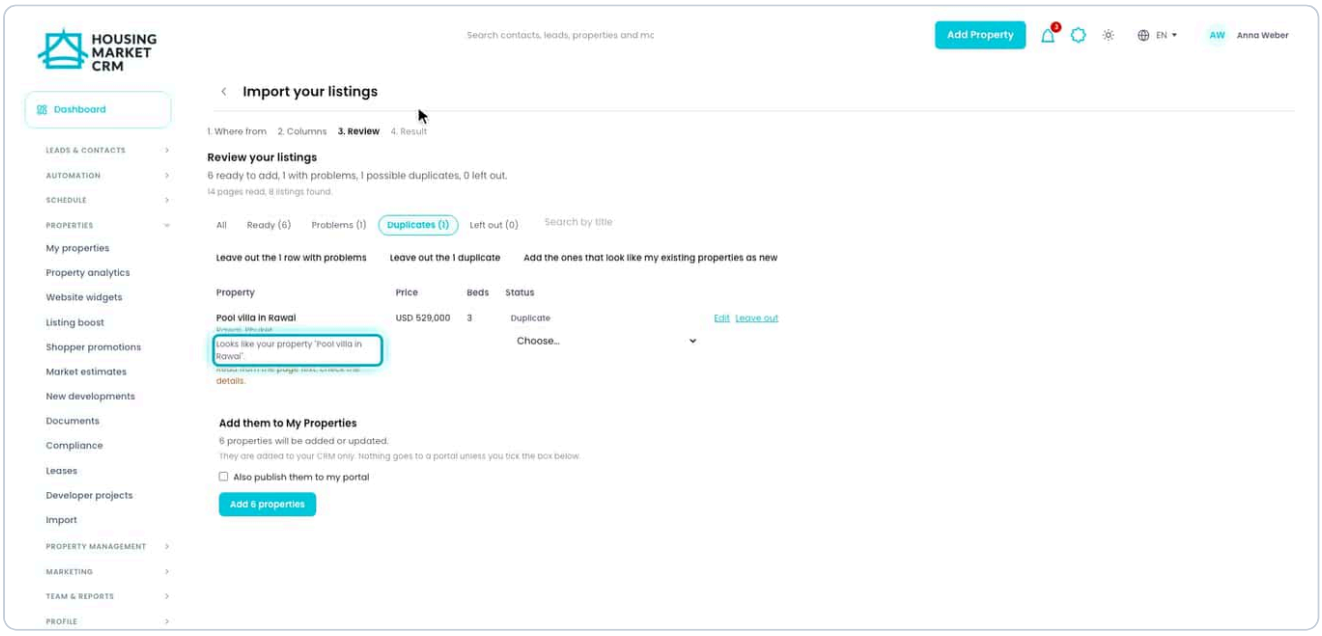


Figure 166.14 · Screen recorded 24 October 2026

15 This one **looks like a property you already have**.

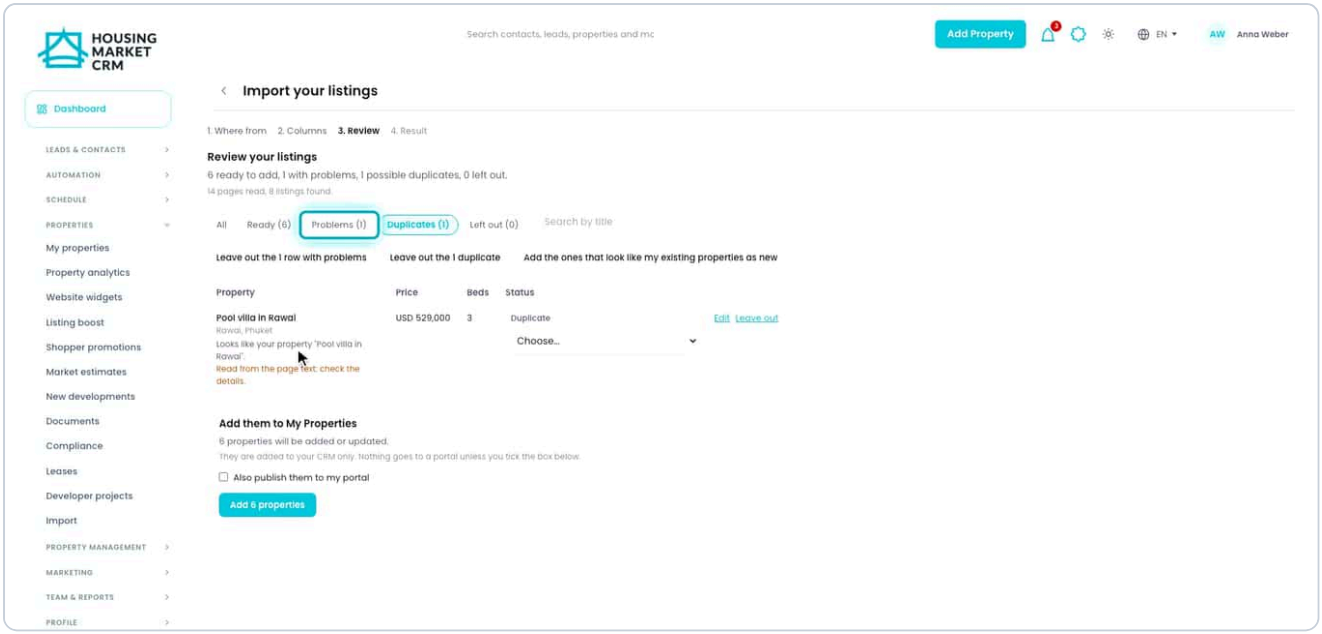


Figure 166.15 · Screen recorded 24 October 2026

16 And the **problems**.

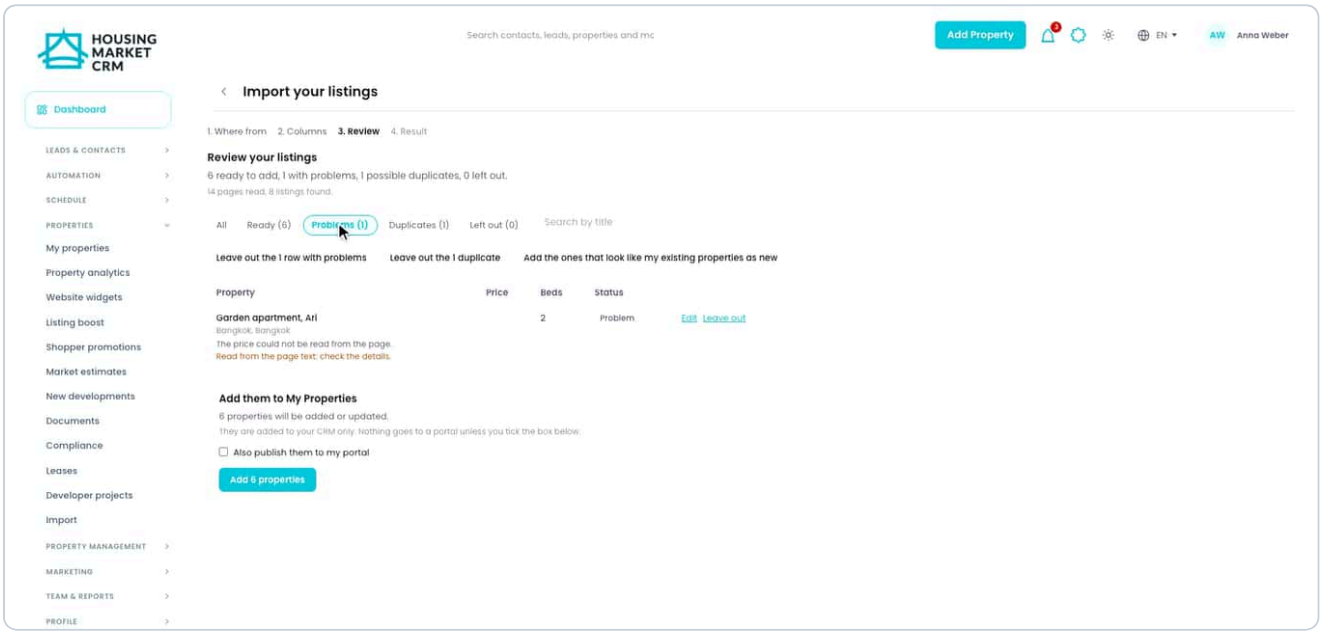


Figure 166.16 · Screen recorded 24 October 2026

17 The price on this page could not be read.

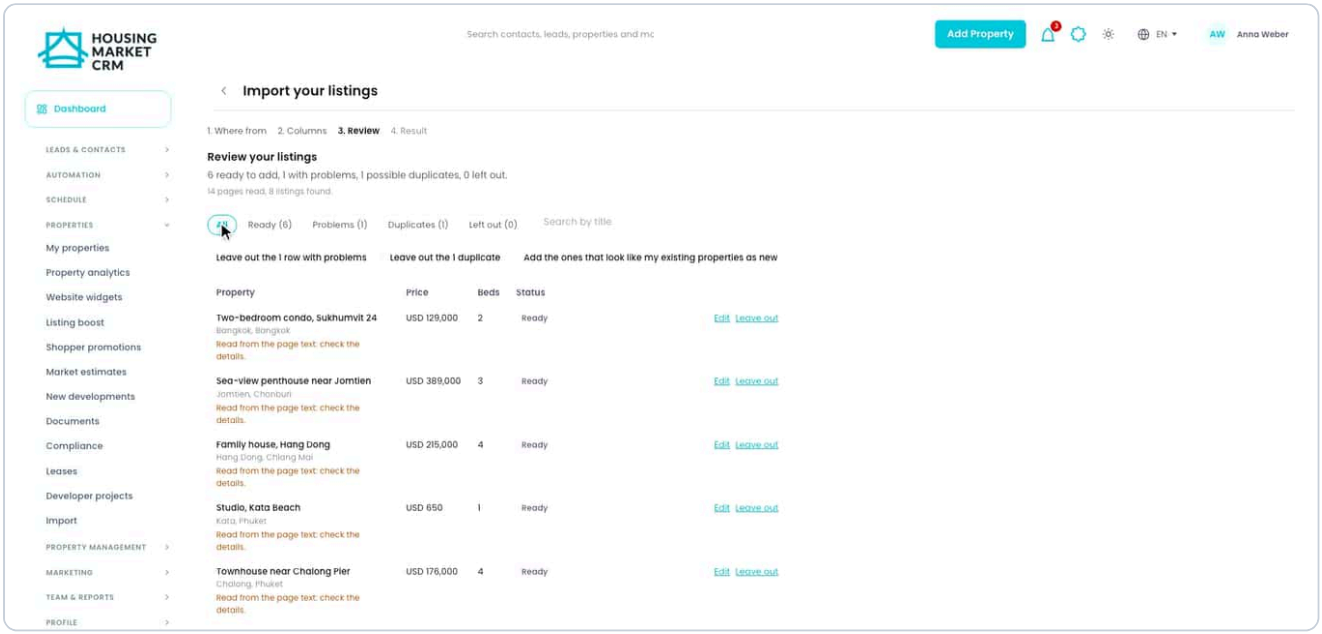


Figure 166.17 · Screen recorded 24 October 2026

18 Leave out the **duplicate** and the row with **problems**.

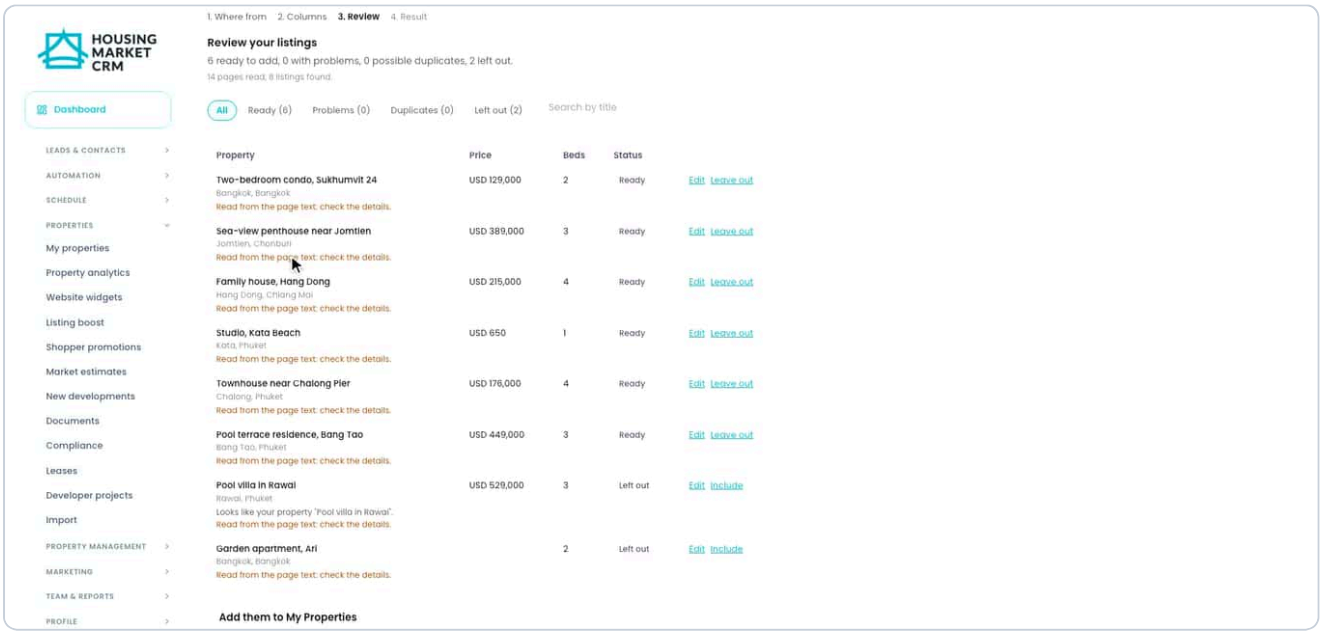


Figure 166.18 · Screen recorded 24 October 2026

19 The rest go into **My Properties**.

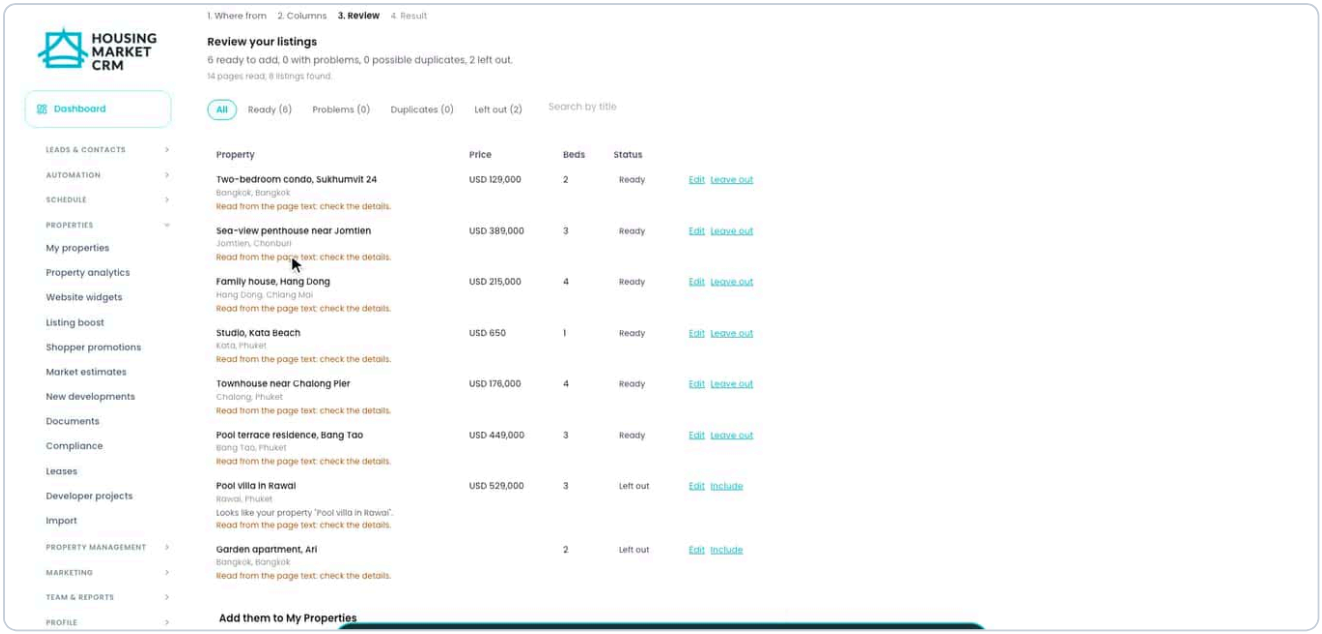


Figure 166.19 · Screen recorded 24 October 2026

20 They are added to your **CRM only**. Nothing goes to a portal unless you tick the box.

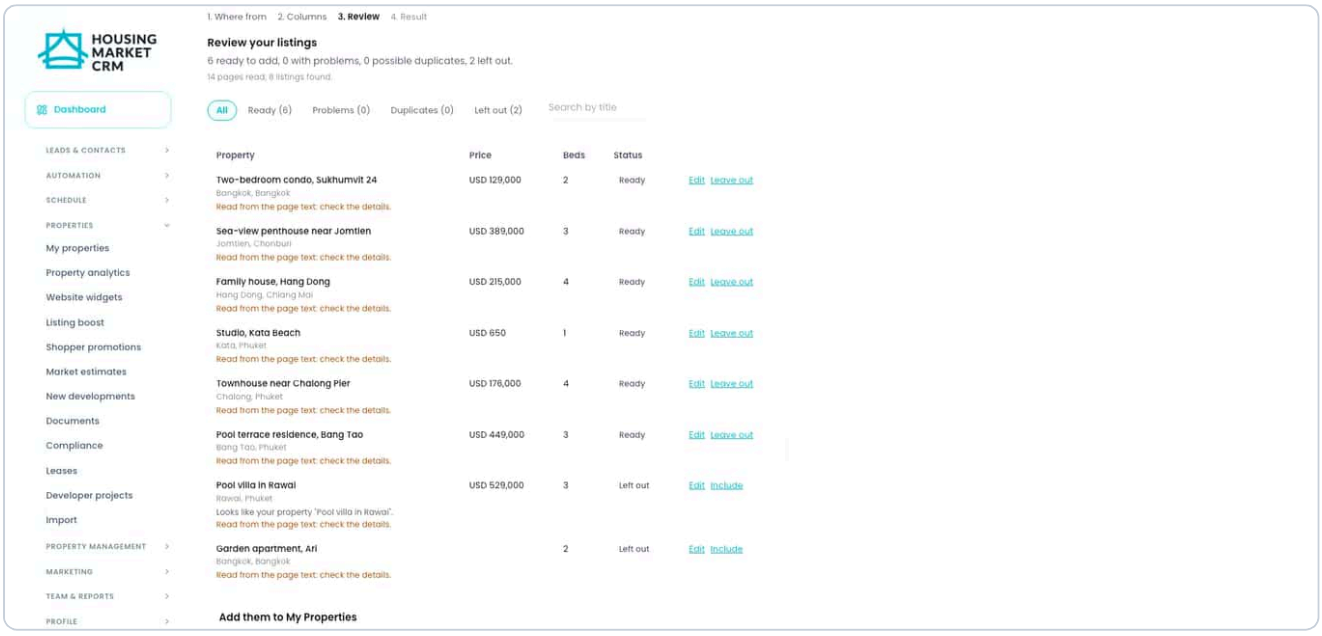


Figure 166.20 · Screen recorded 24 October 2026

21 Click **Add 6 properties**.

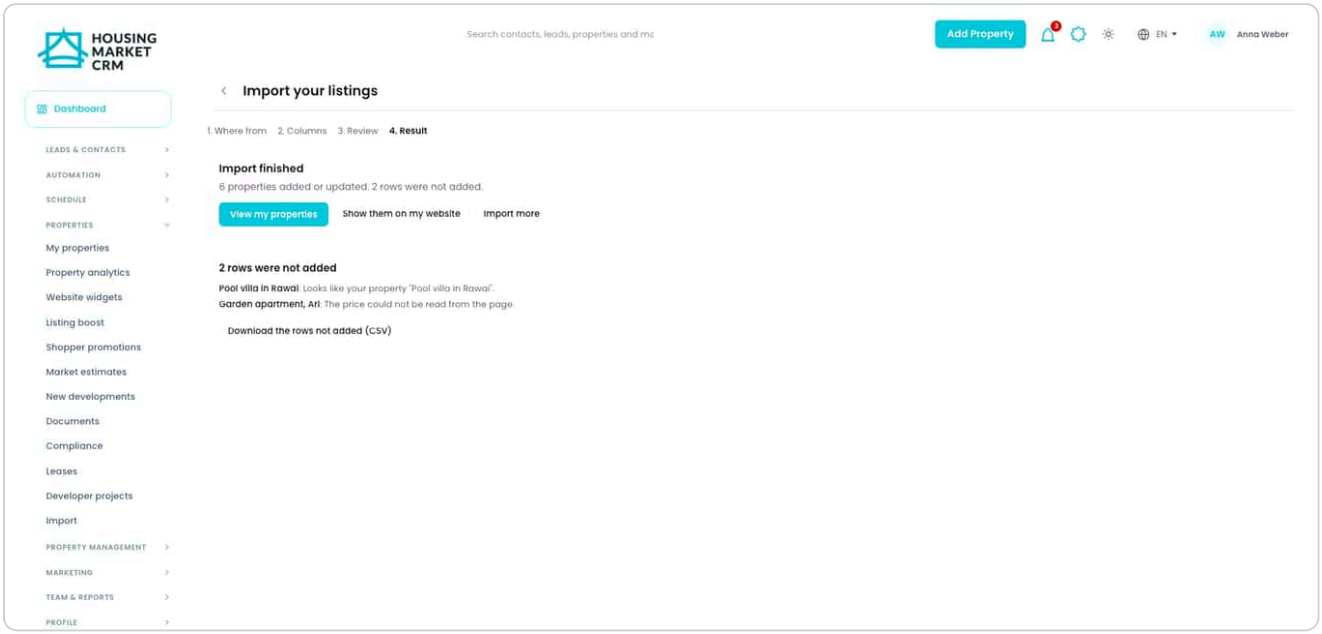


Figure 166.21 · Screen recorded 24 October 2026

22 **6 properties** were added.

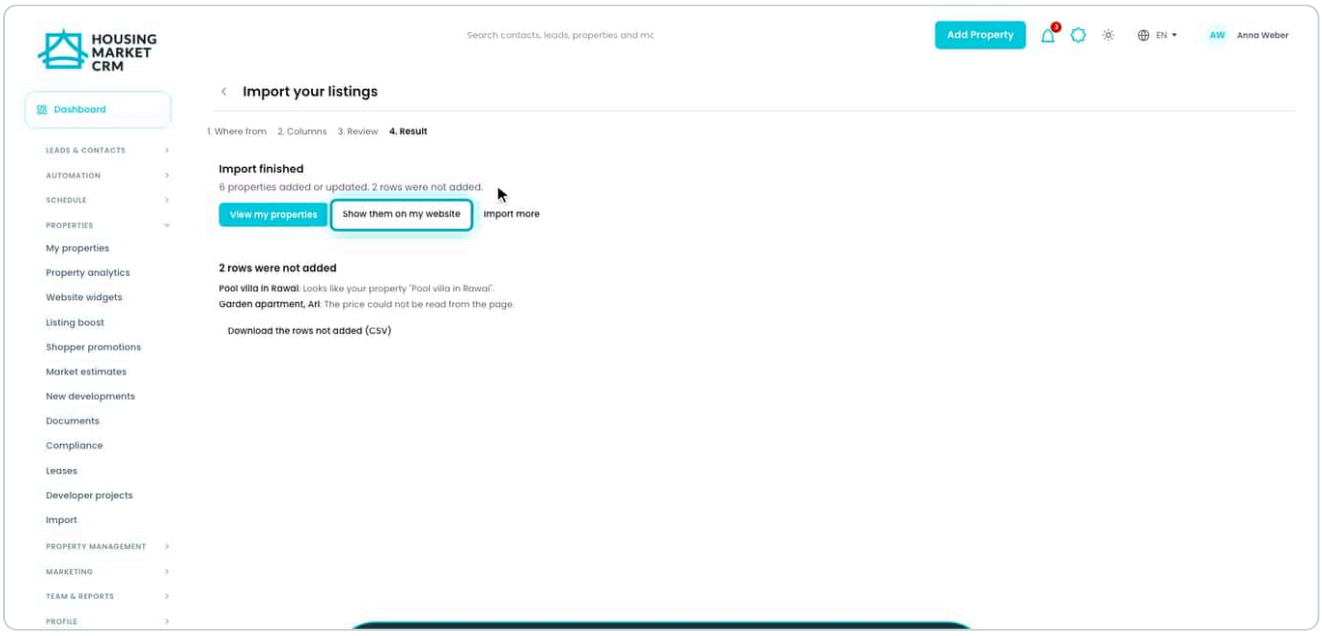


Figure 166.22 · Screen recorded 24 October 2026

23 **Show them on my website** takes you to the widget settings.

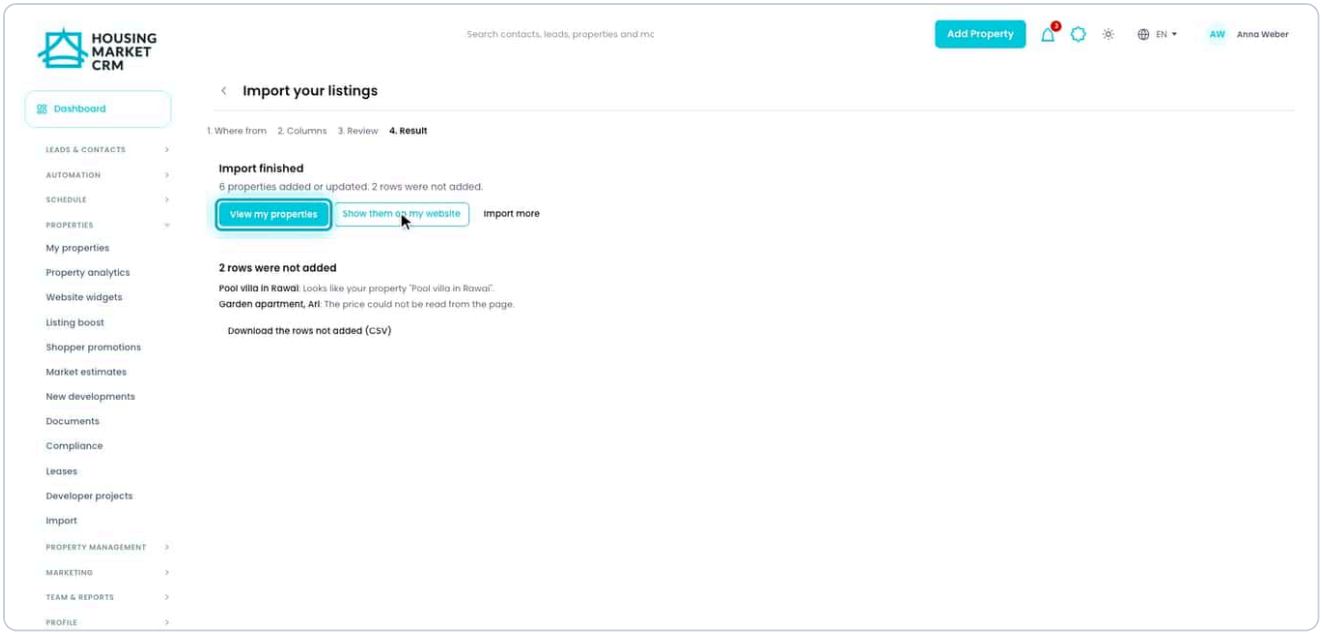


Figure 166.23 · Screen recorded 24 October 2026

24 Or open **My Properties** to see them.

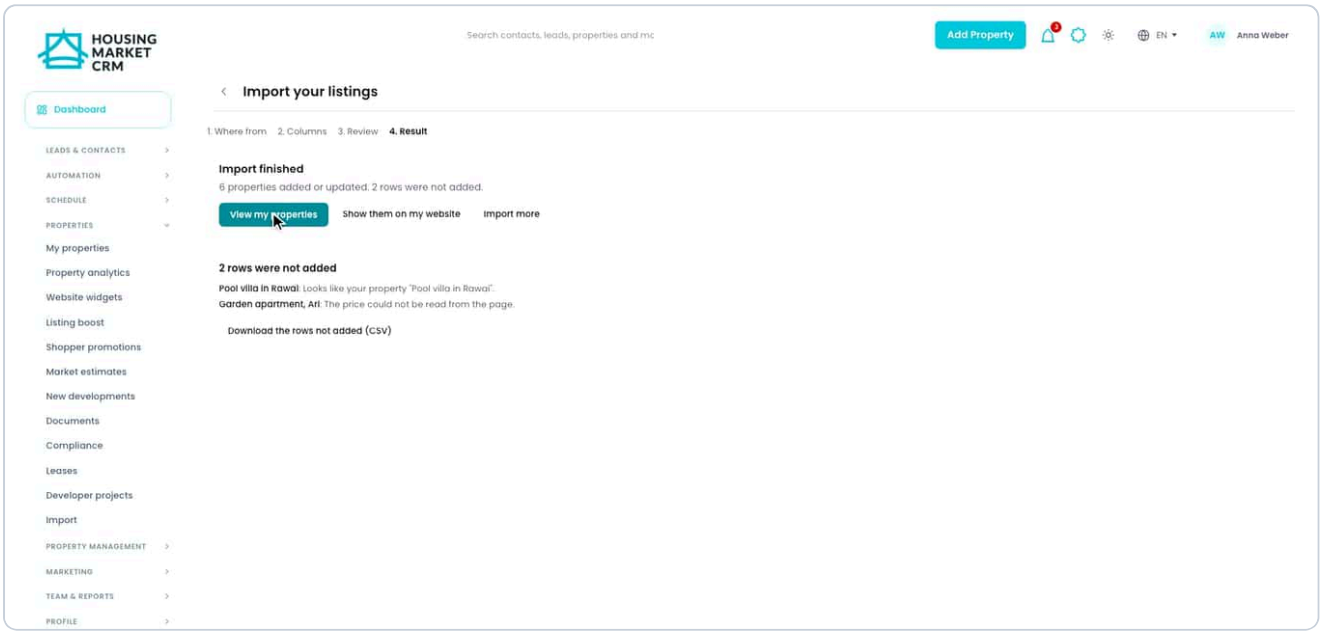


Figure 166.24 · Screen recorded 24 October 2026

RELATED HELP CENTER ARTICLES

Can I import from another CRM?	faq.housingmarketgroup.com/faq/can-i-import-from-another-crm
Can I manage my property listings?	faq.housingmarketgroup.com/faq/can-i-manage-my-property-listings

PART 14

WP Connect for WordPress

167 Connect your WordPress website to the CRM

168 Install and connect WP Connect on WordPress

169 Import your listings into WordPress

170 Show your properties on a WordPress site

171 WordPress enquiries, consent and the pixel

167 CHAPTER 167

Connect your WordPress website to the CRM

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

Install and activate the plugin, then in WordPress open Housing Market CRM Connect, then Connection, choose Connect to Housing Market, sign in and approve.

- Install and activate the Housing Market CRM Connect plugin. A Housing Market CRM Connect menu appears in WordPress.
- Open Housing Market CRM Connect, then Connection, and choose Connect to Housing Market.
- You arrive at the Housing Market CRM sign-in page. Sign in, or create an account.
- Check the name of your site and the permissions it asks for, and choose Approve.
- You return to WordPress, where the Connection page shows your account, country, plan and the health of the connection.

You need WordPress 6.2 or newer, PHP 8.1 or newer and a site on HTTPS. If your site has hundreds of properties and a custom theme, a rehearsal on a copy of the site costs nothing.

The Free plan of Housing Market CRM connects one site, and more sites need Pro. If the Connection page says the connection needs to be renewed, choose Connect to Housing Market again.

From the Help Center: **How do I connect my WordPress site to Housing Market CRM?**

STEP BY STEP

1 Open **Settings**, then **Integrations** in your CRM.

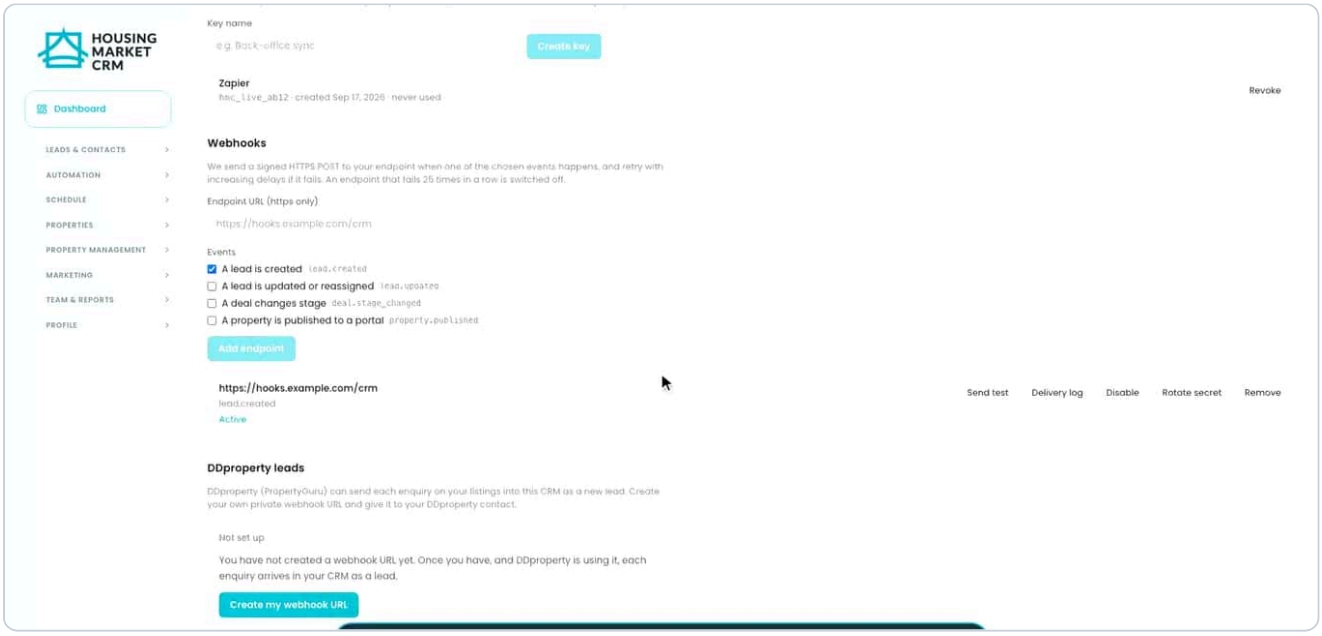


Figure 167.1 · Screen recorded 24 October 2026

2 **Connected websites** lists the WordPress sites linked to your account.

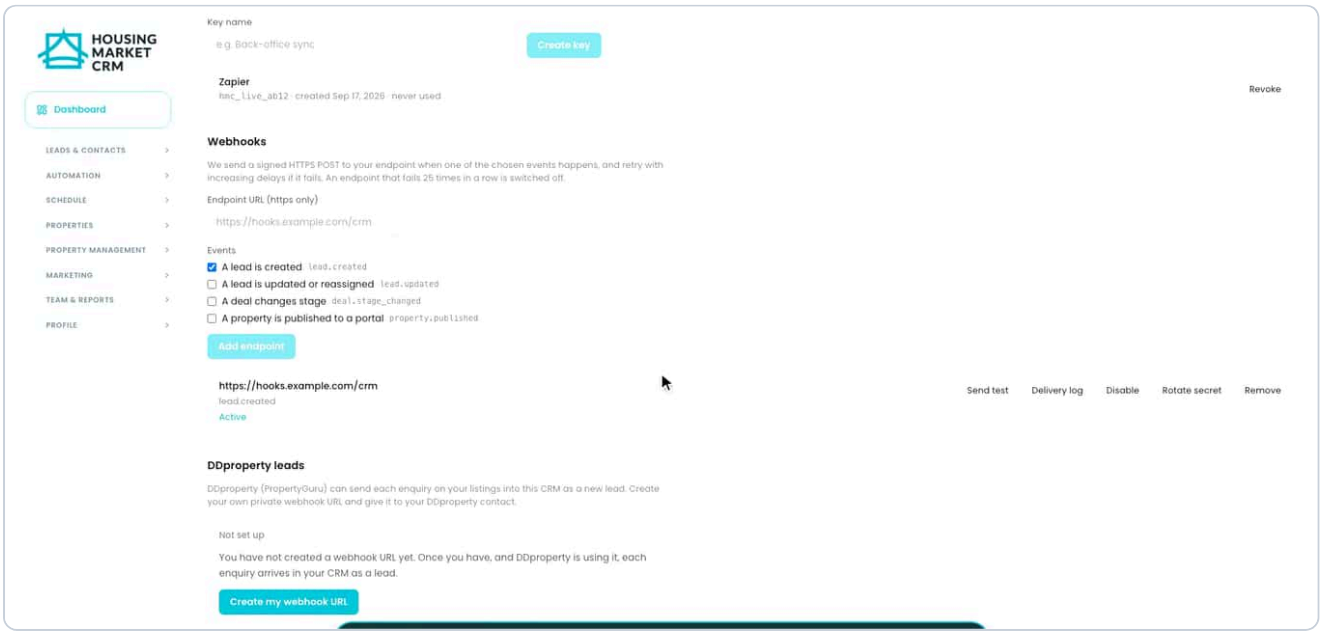


Figure 167.2 · Screen recorded 24 October 2026

3 None yet. Install the **WP Connect** plugin on your WordPress site and press **Connect**.

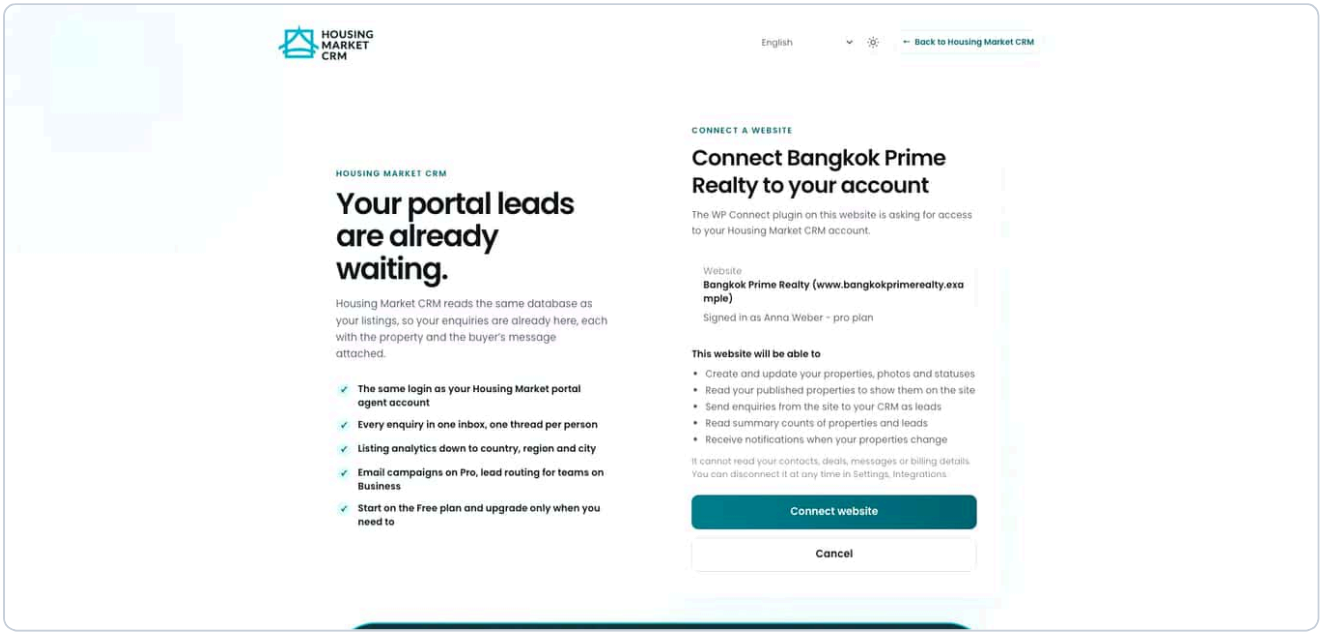


Figure 167.3 · Screen recorded 24 October 2026

4 Pressing **Connect** in the plugin sends you to this page in your CRM.

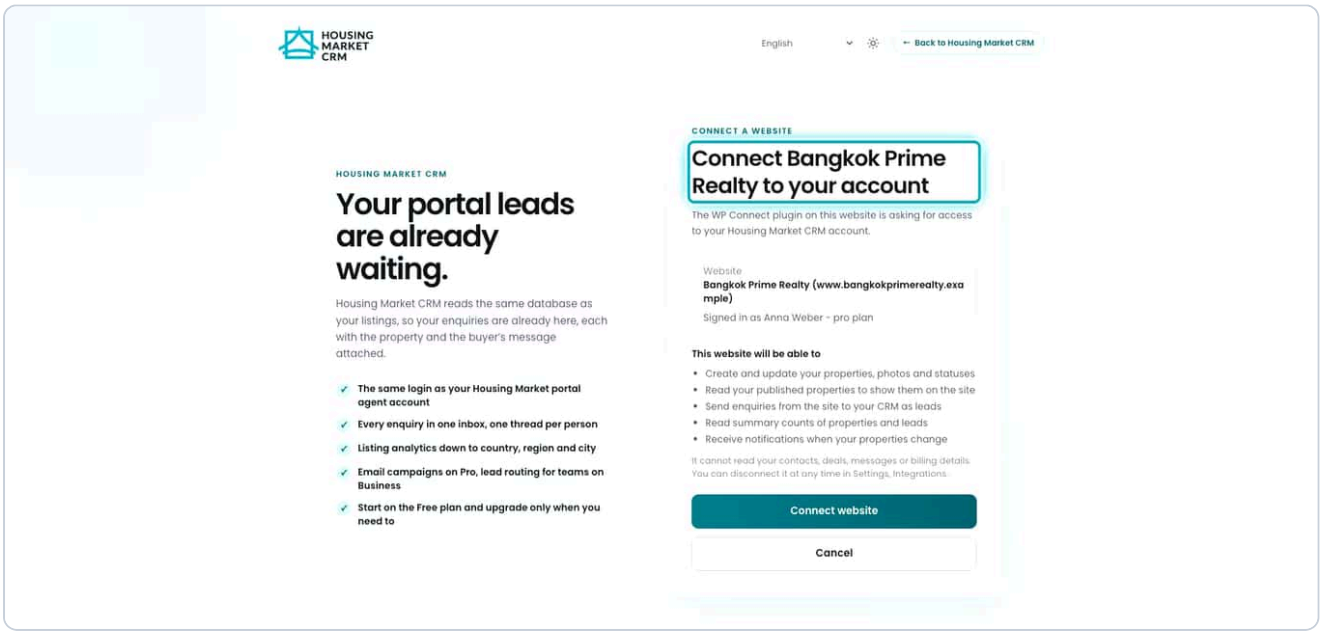


Figure 167.4 · Screen recorded 24 October 2026

5 Check the website that is asking to connect.

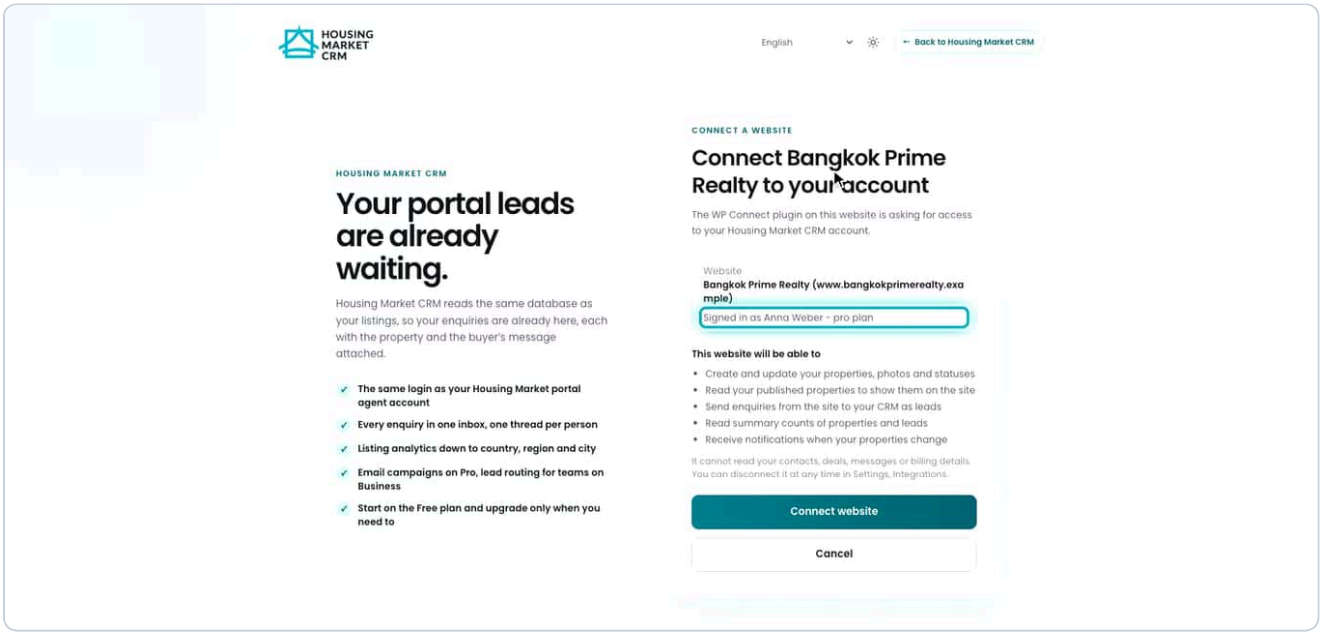


Figure 167.5 · Screen recorded 24 October 2026

6 It connects to the account you are signed in with.

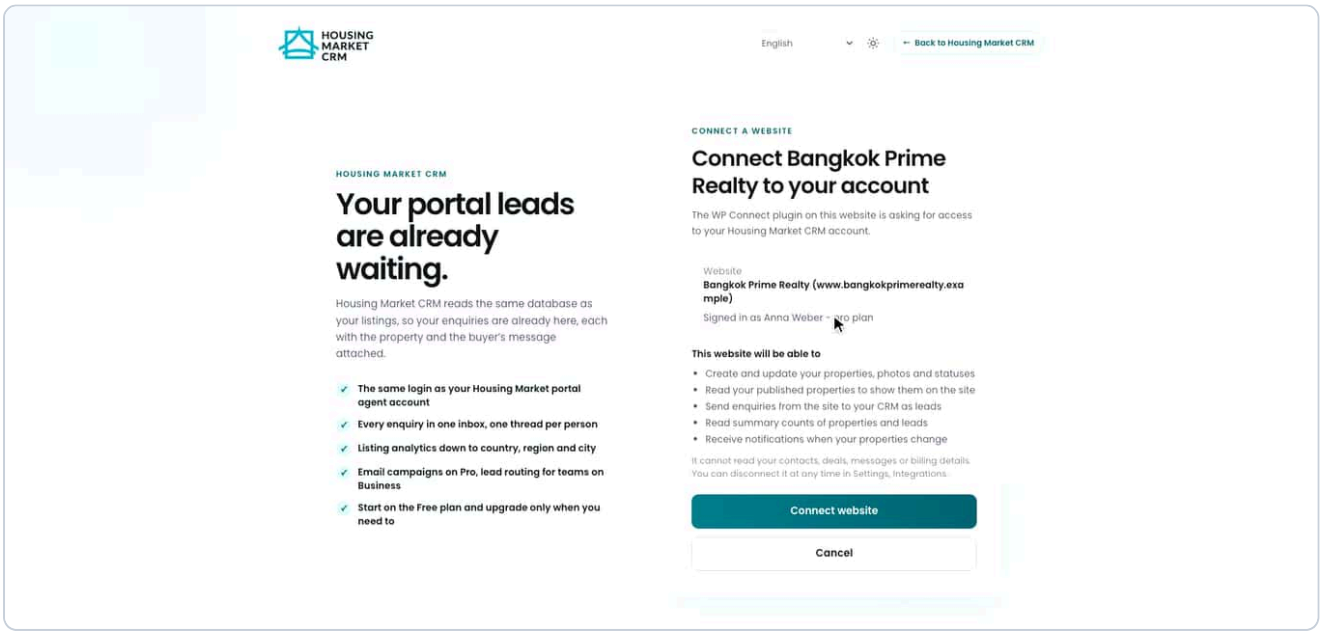


Figure 167.6 · Screen recorded 24 October 2026

7 These are the things it **will be able to do**:

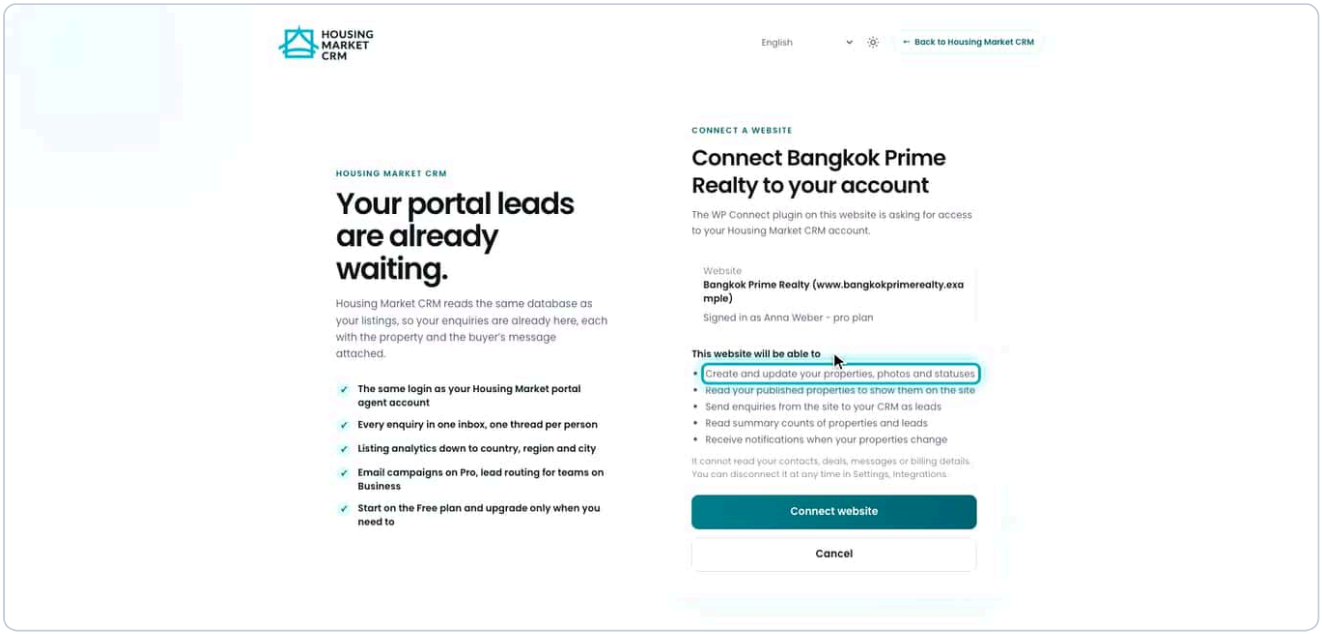


Figure 167.7 · Screen recorded 24 October 2026

8 Create and update your **properties** send its **enquiries** to your CRM as leads.

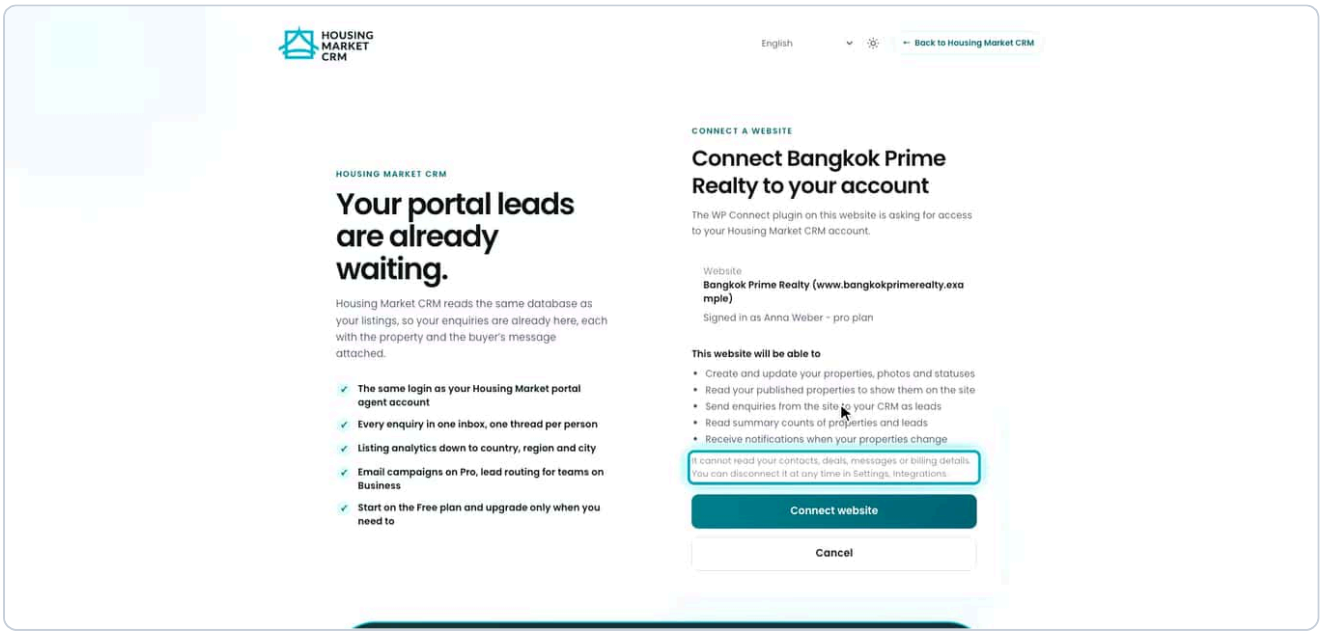


Figure 167.8 · Screen recorded 24 October 2026

9 It **cannot** read your contacts, deals, messages or billing details.

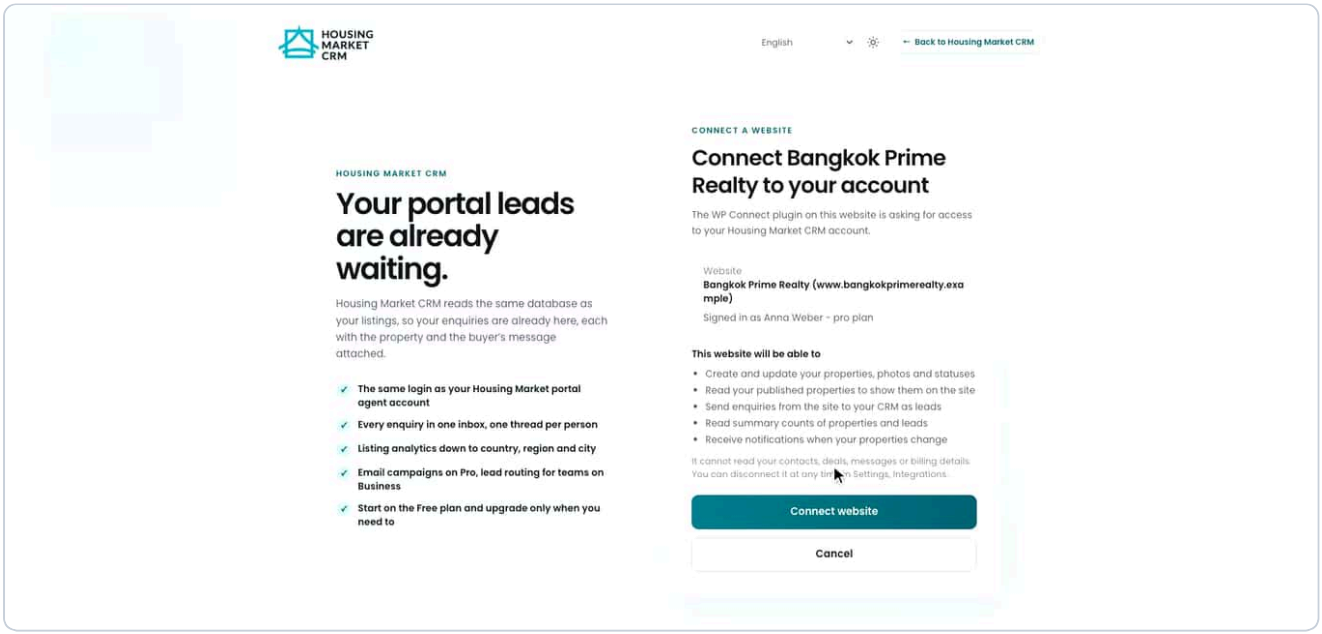


Figure 167.9 · Screen recorded 24 October 2026

10 If it is your website, click **Connect website**.

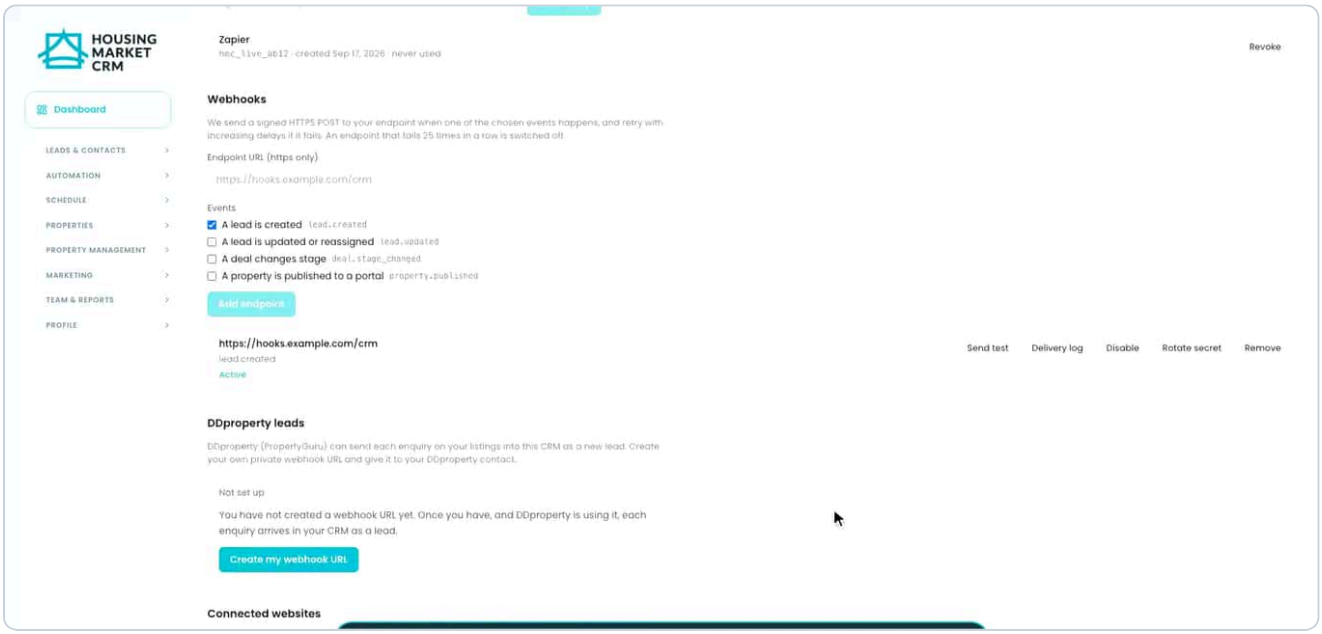


Figure 167.10 · Screen recorded 24 October 2026

11 WordPress takes over from here. In the CRM, the website now appears under **Settings, Integrations**.

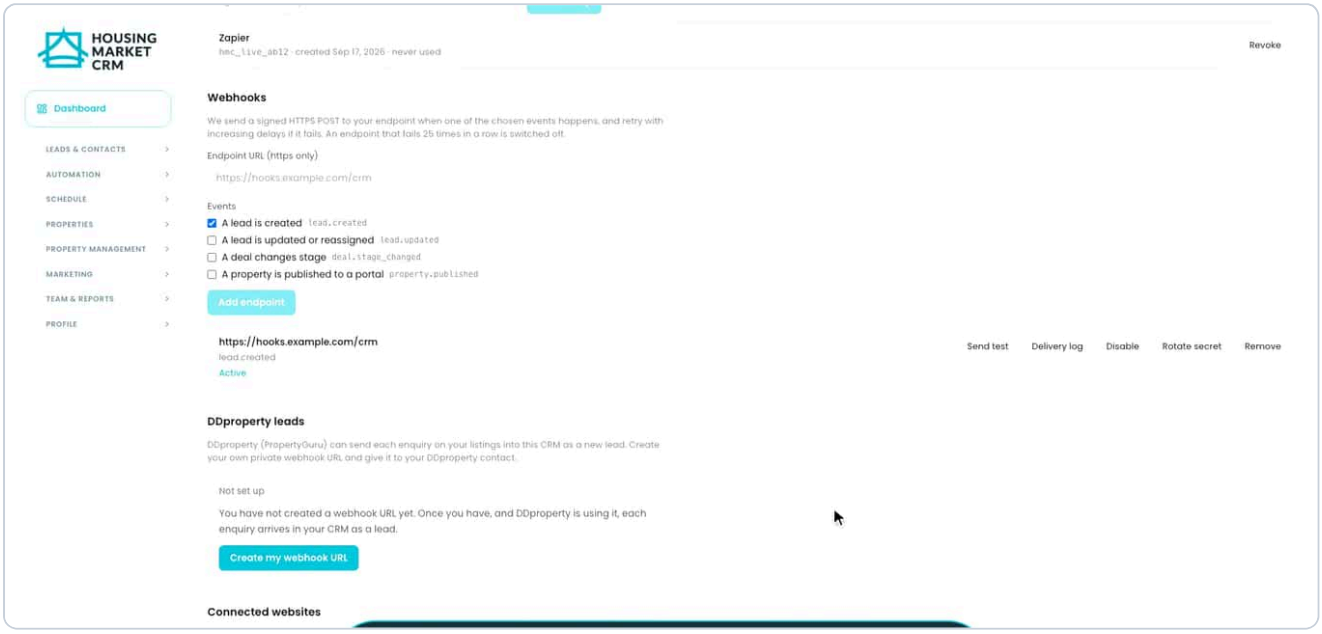


Figure 167.11 · Screen recorded 24 October 2026

12 You see when it was **connected** and when it was **last used**.

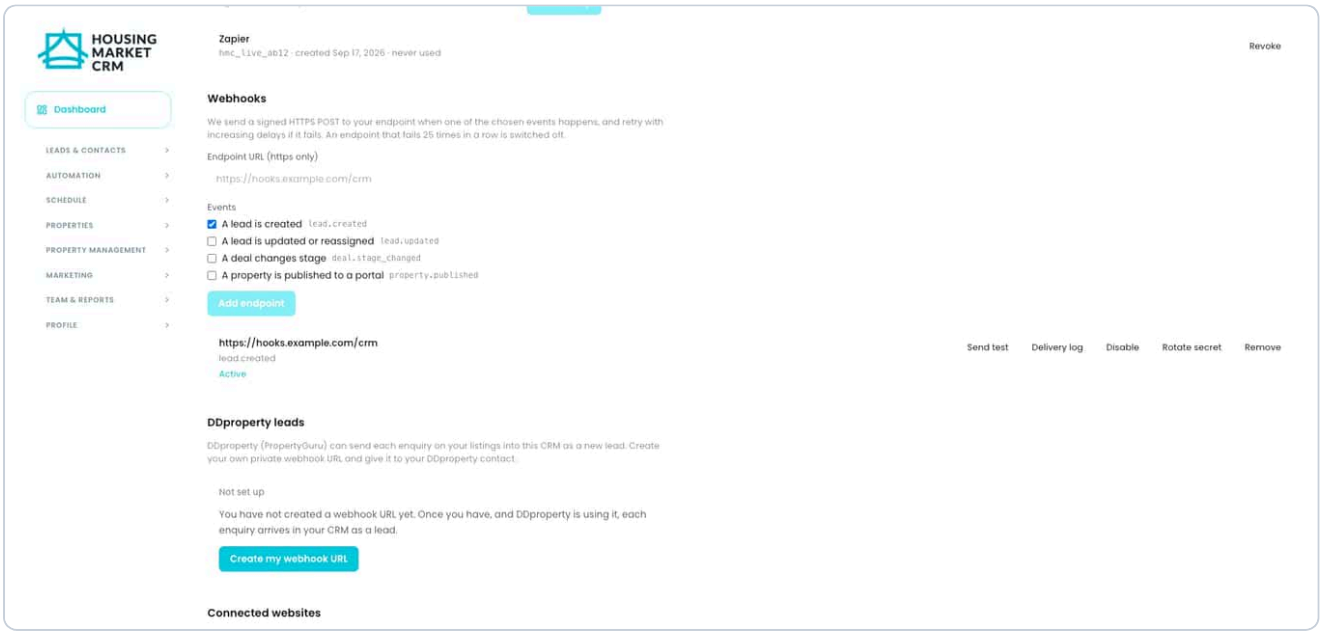


Figure 167.12 · Screen recorded 24 October 2026

13 You can **disconnect** it at any time.

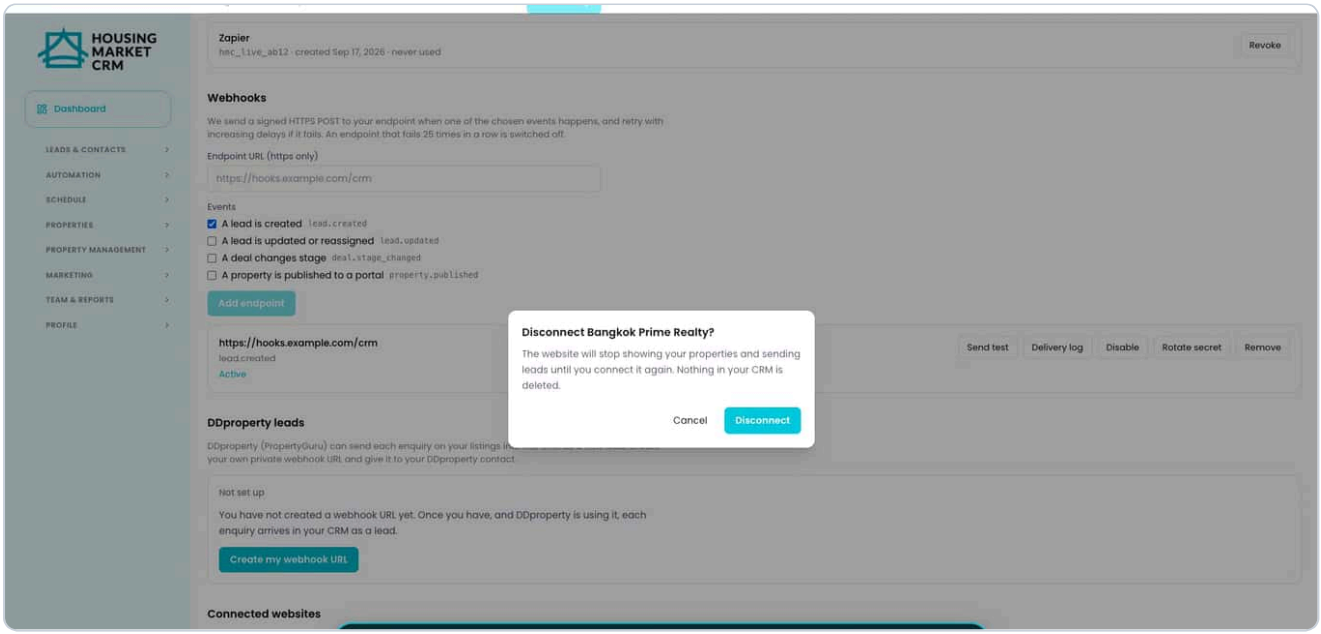


Figure 167.13 · Screen recorded 24 October 2026

14 The website stops showing your properties and sending leads, and **nothing in your CRM is deleted**.

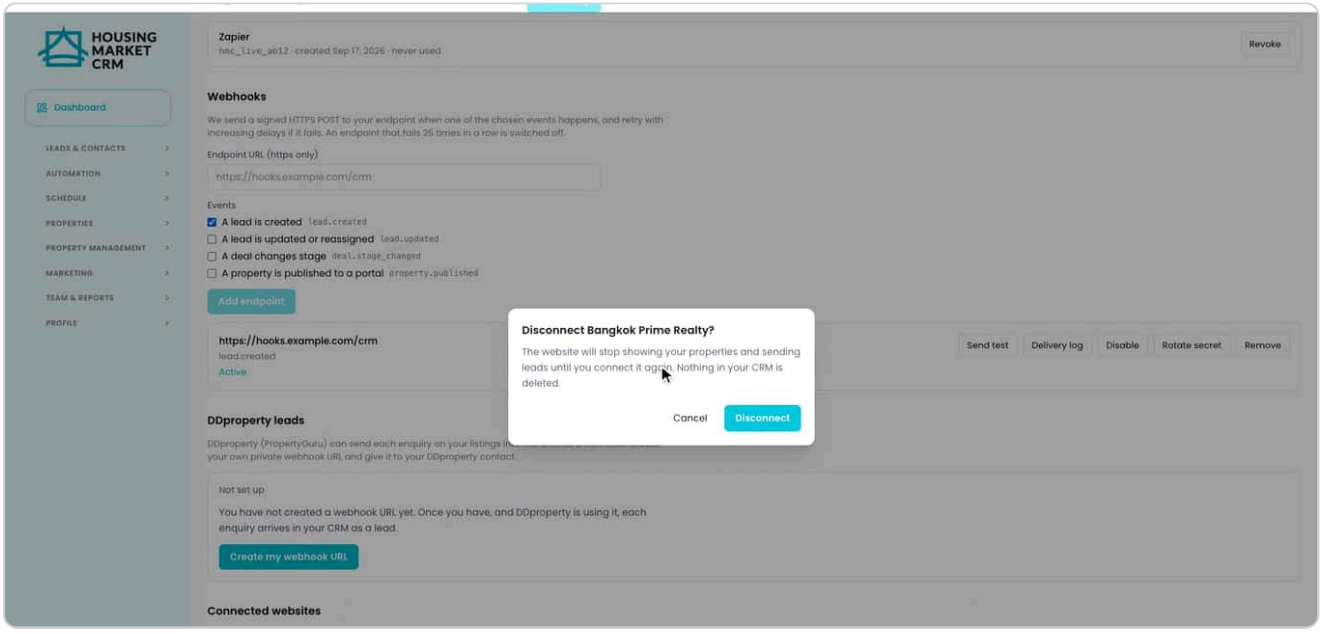


Figure 167.14 · Screen recorded 24 October 2026

15 We will keep it connected.

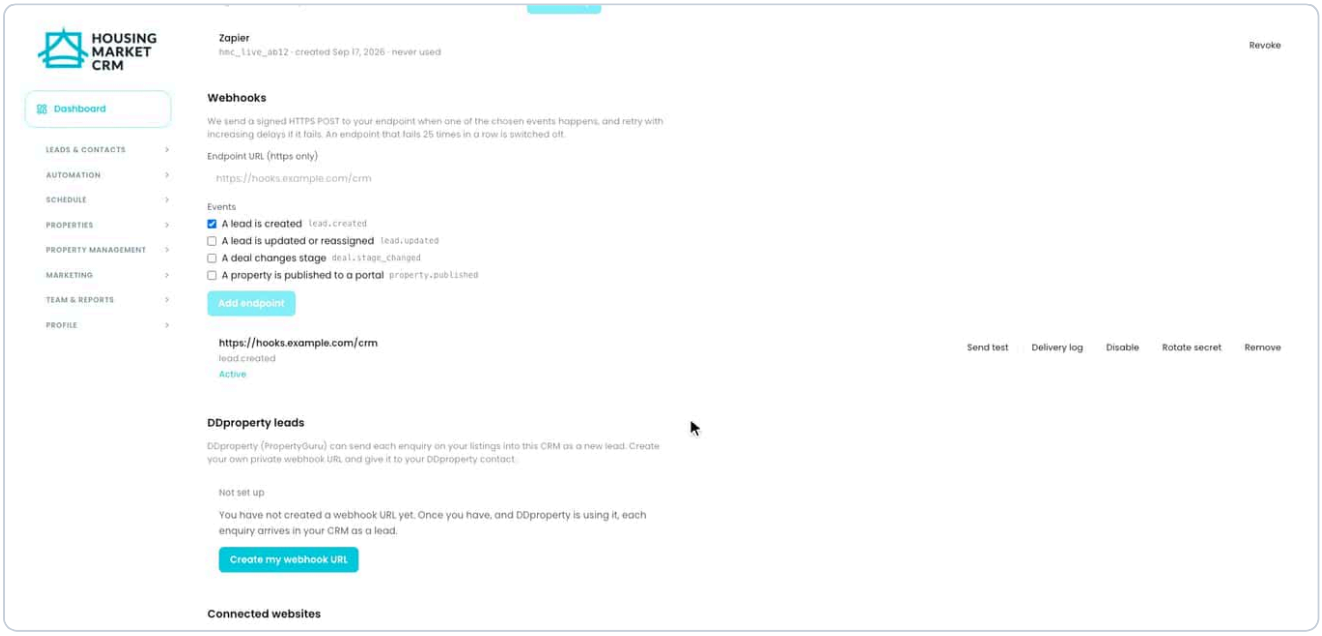


Figure 167.15 · Screen recorded 24 October 2026

RELATED HELP CENTER ARTICLES

What is a property website in the CRM?	faq.housingmarketgroup.com/faq/what-is-a-property-website-in-the-crm

168 CHAPTER 168

Install and connect WP Connect on WordPress

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

Install and activate the plugin, then in WordPress open Housing Market CRM Connect, then Connection, choose Connect to Housing Market, sign in and approve.

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You need WordPress 6.2 or newer, PHP 8.1 or newer and a site on HTTPS. If your site has hundreds of properties and a custom theme, a rehearsal on a copy of the site costs nothing.

The Free plan of Housing Market CRM connects one site, and more sites need Pro. If the Connection page says the connection needs to be renewed, choose Connect to Housing Market again.

From the Help Center: **How do I connect my WordPress site to Housing Market CRM?**

STEP BY STEP

1 In WordPress, open **Plugins**, **Add New Plugin**, then **Upload Plugin**.

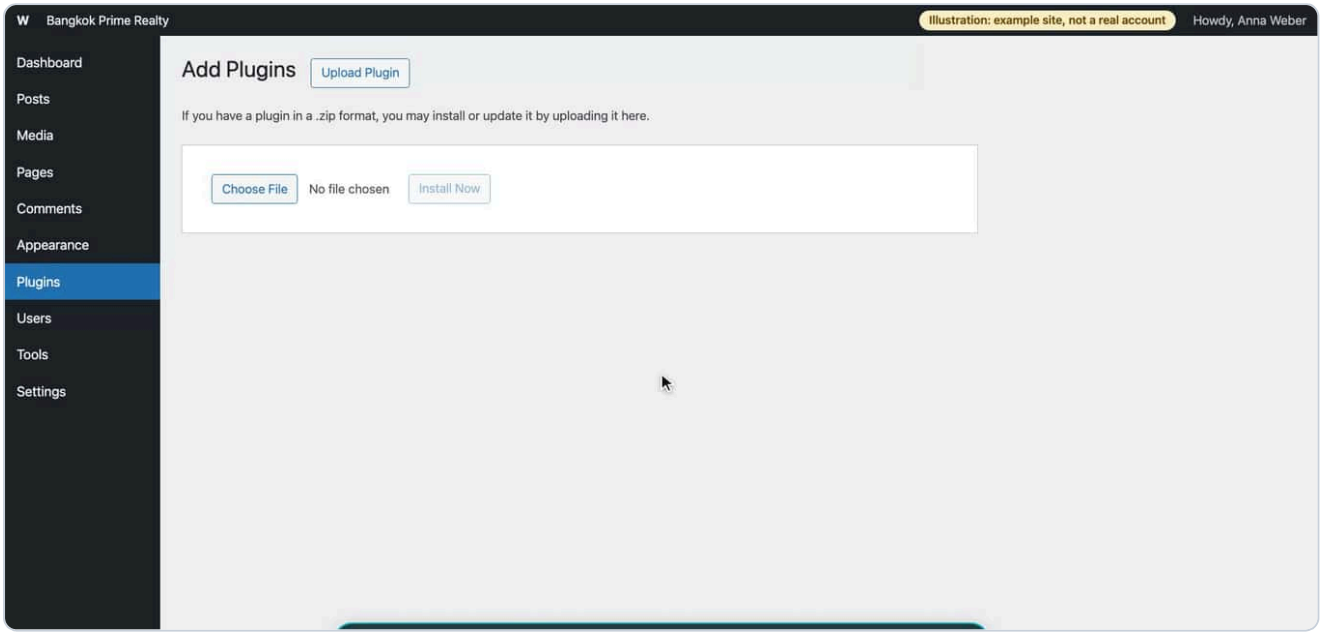


Figure 168.1 · Screen recorded 4 November 2026

2 Click **Choose File** and pick the **housing-market-wp-connect** zip then click **Install Now**.

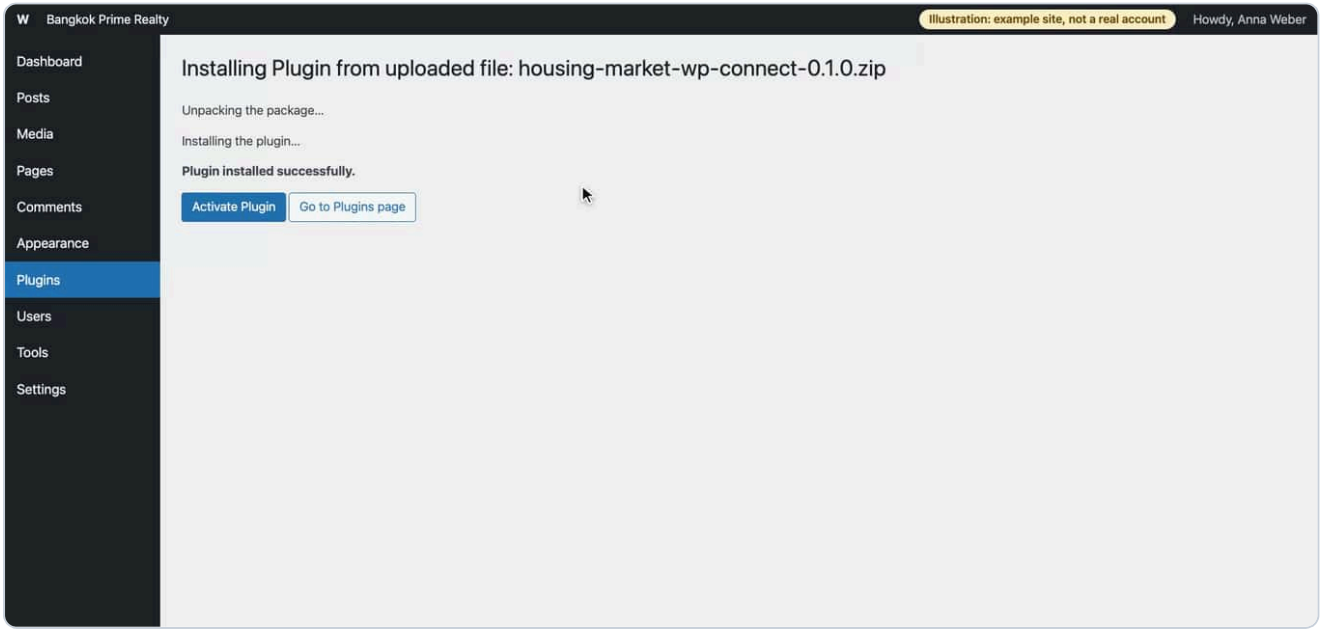


Figure 168.2 · Screen recorded 4 November 2026

3 WordPress unpacks and installs it.

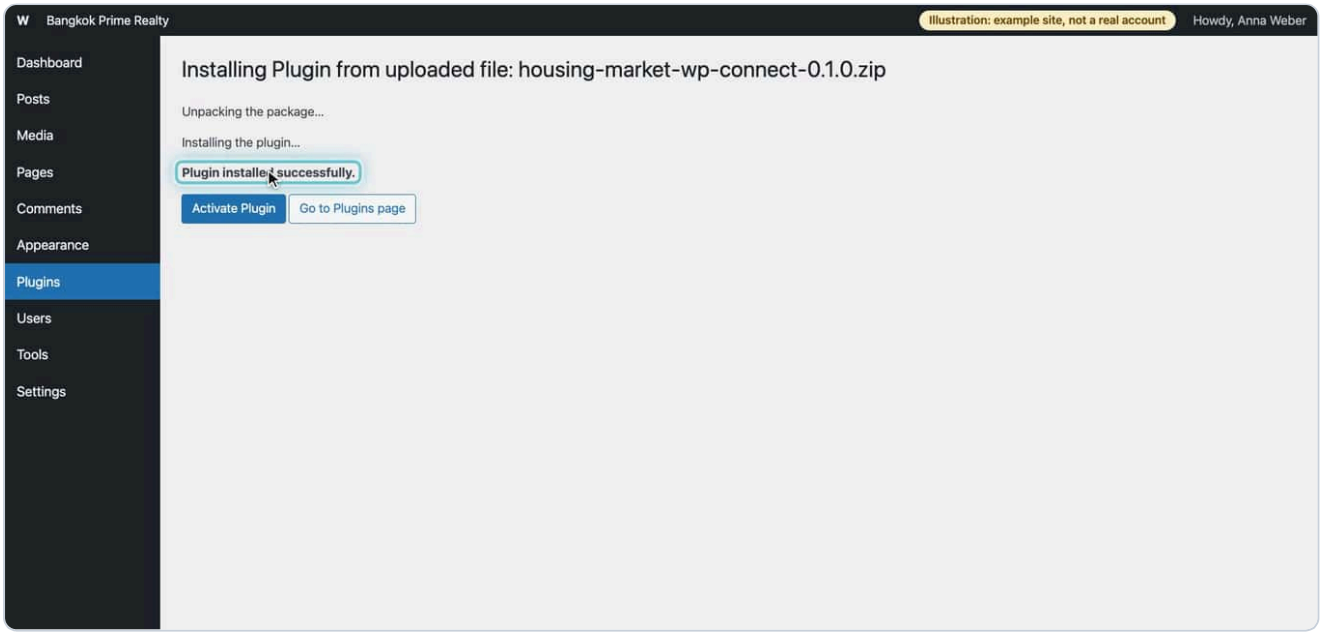


Figure 168.3 · Screen recorded 4 November 2026

4 Click **Activate Plugin**.

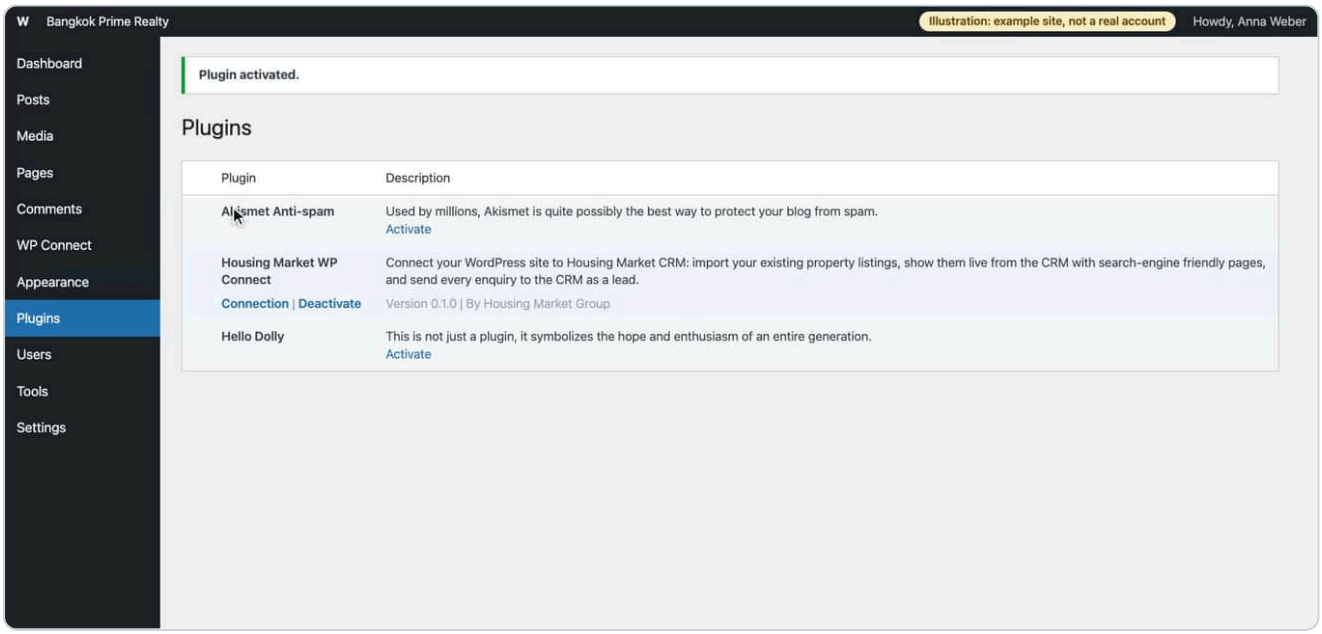


Figure 168.4 · Screen recorded 4 November 2026

5 The plugin is **active**, and a **WP Connect** menu appears.

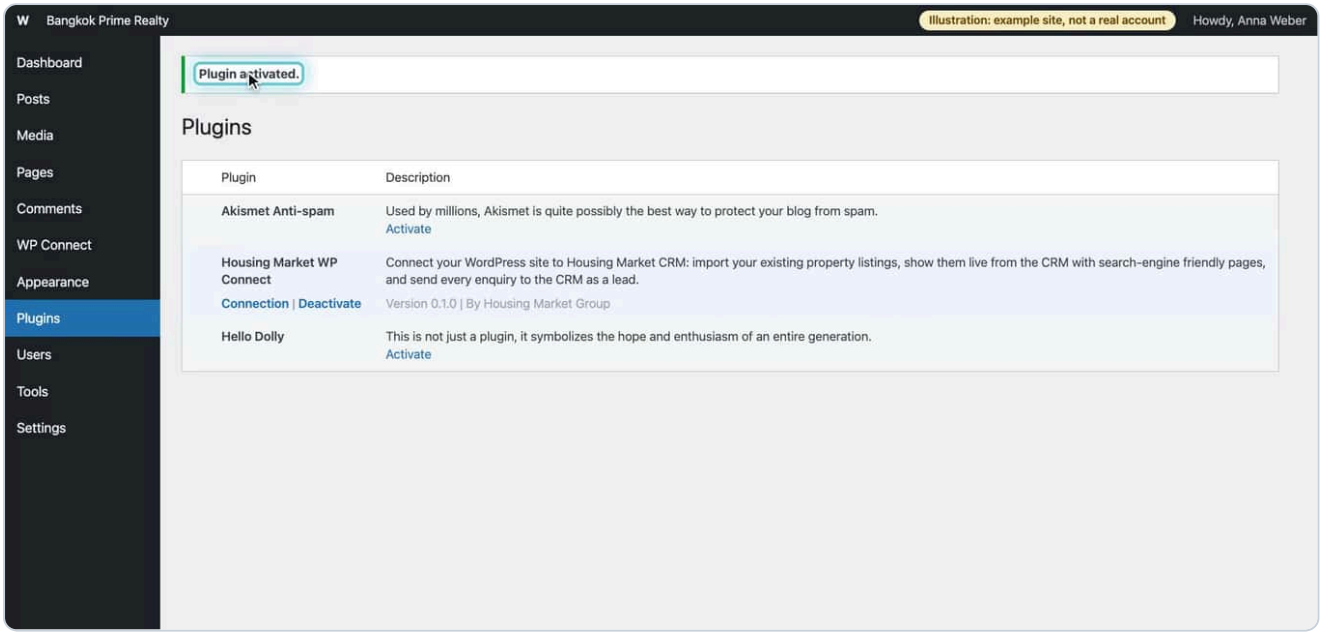


Figure 168.5 · Screen recorded 4 November 2026

6 Open **WP Connect**. The **Connection** screen is first.

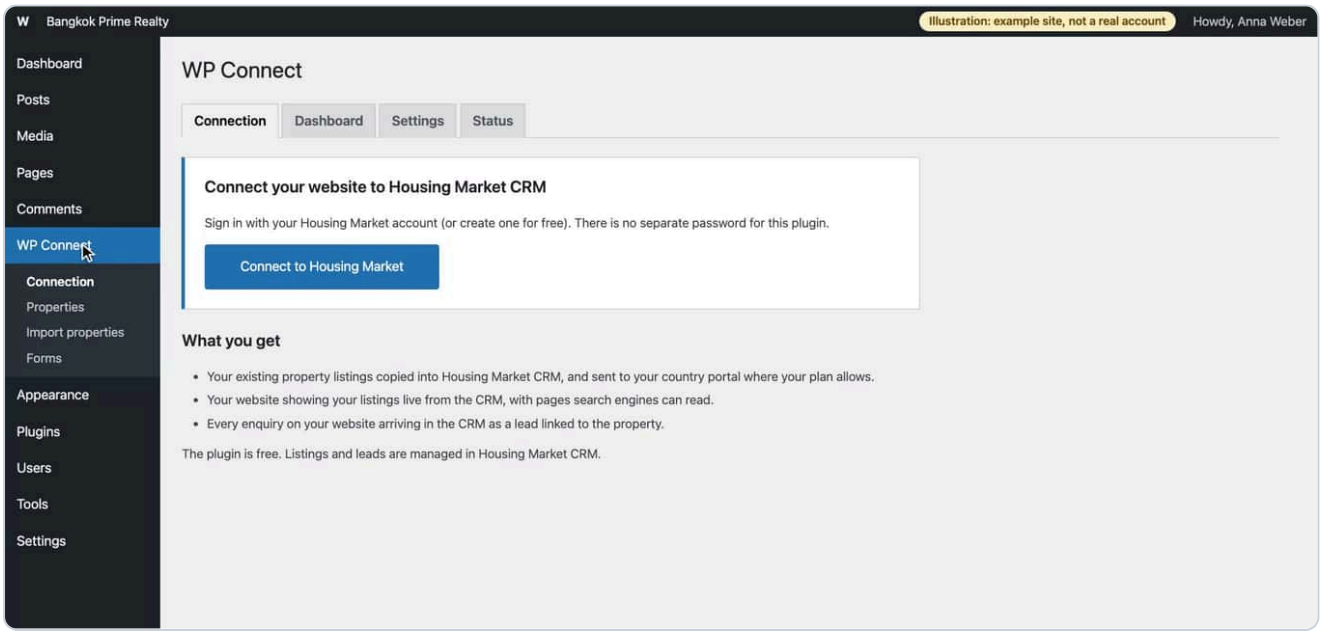


Figure 168.6 · Screen recorded 4 November 2026

7 Sign in with your Housing Market account, or create one for free.

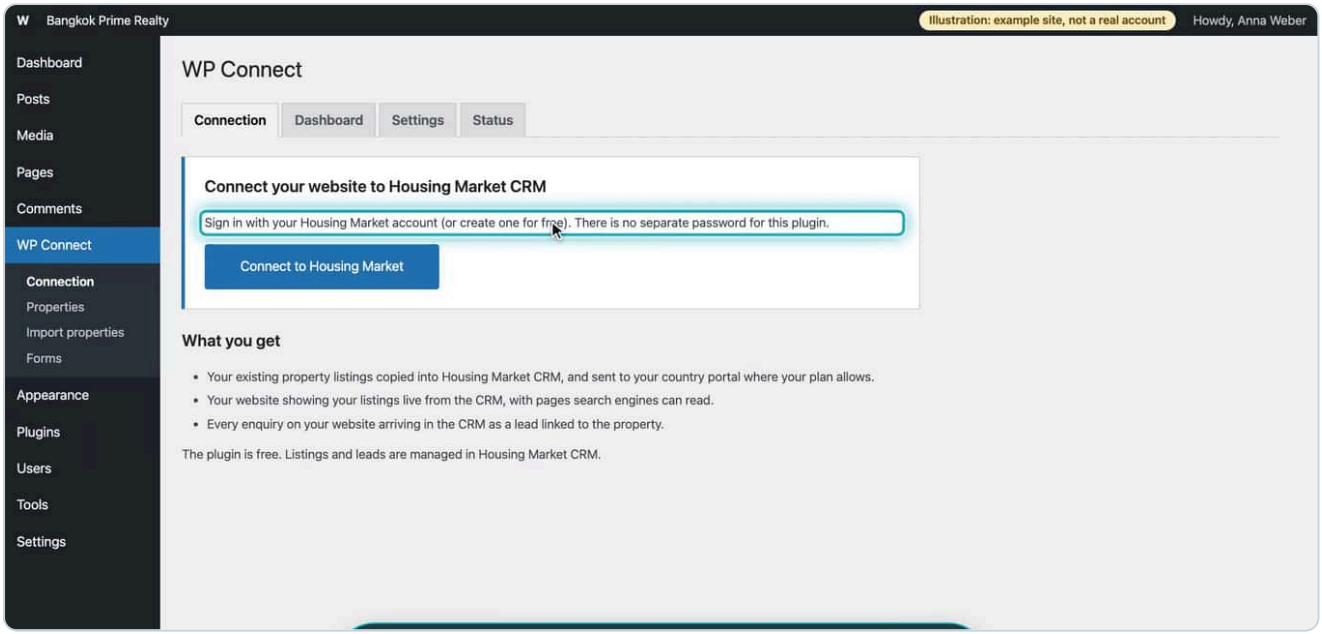


Figure 168.7 · Screen recorded 4 November 2026

8 There is no separate password for the plugin.

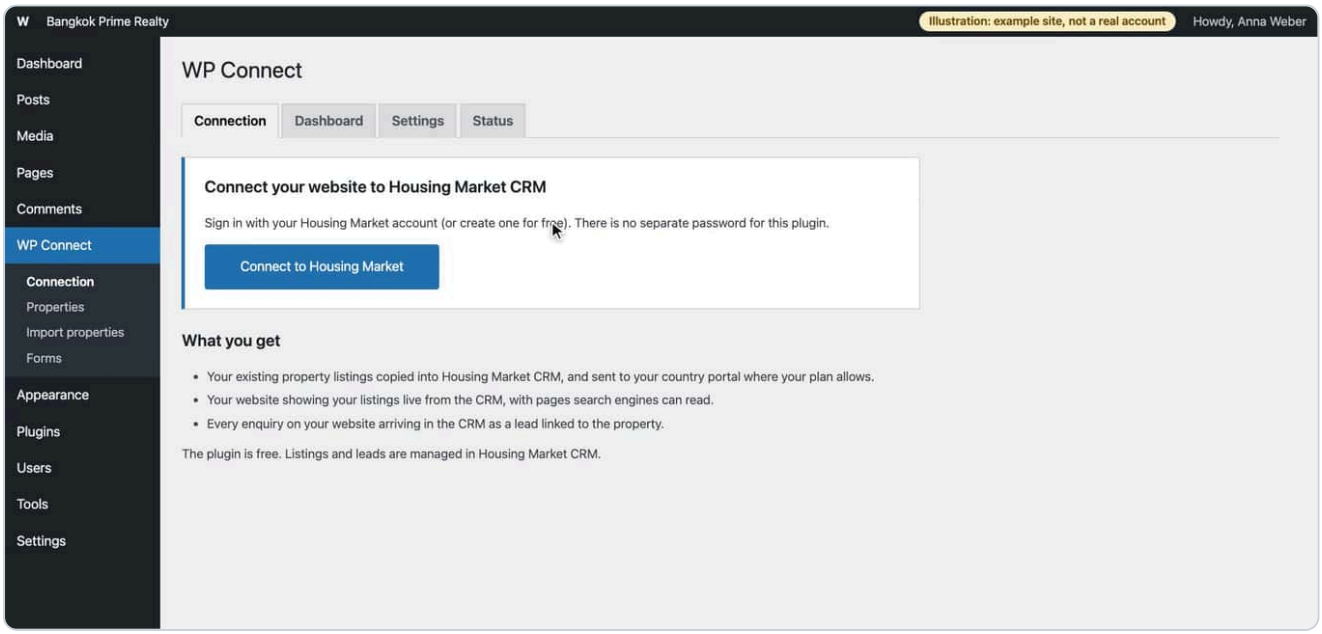


Figure 168.8 · Screen recorded 4 November 2026

9 Click **Connect to Housing Market**.

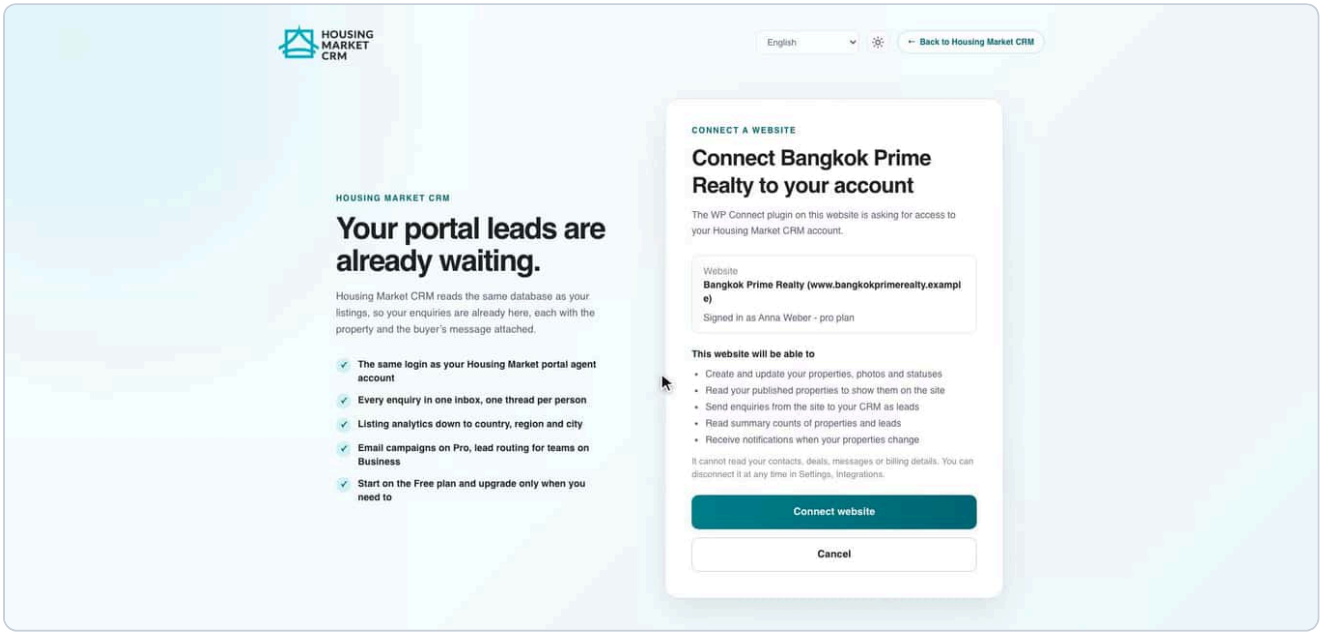


Figure 168.9 · Screen recorded 4 November 2026

10 You land on a **consent page** in your Housing Market CRM.

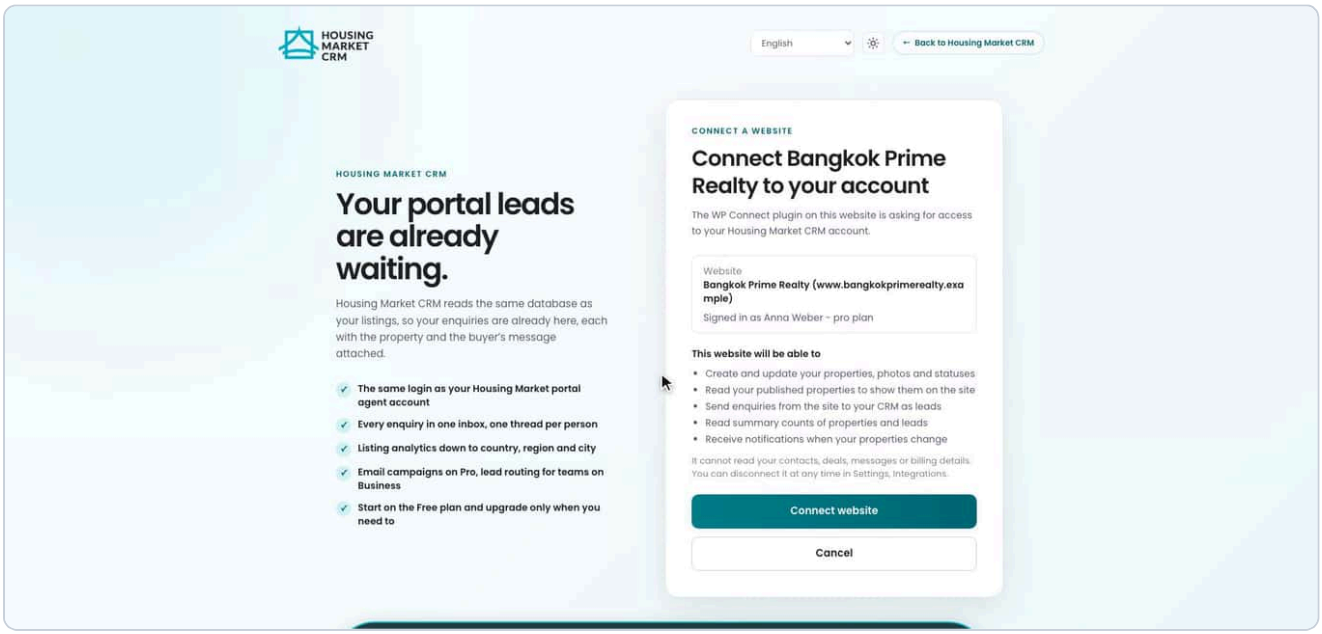


Figure 168.10 · Screen recorded 4 November 2026

11 Check the website that is asking to connect.

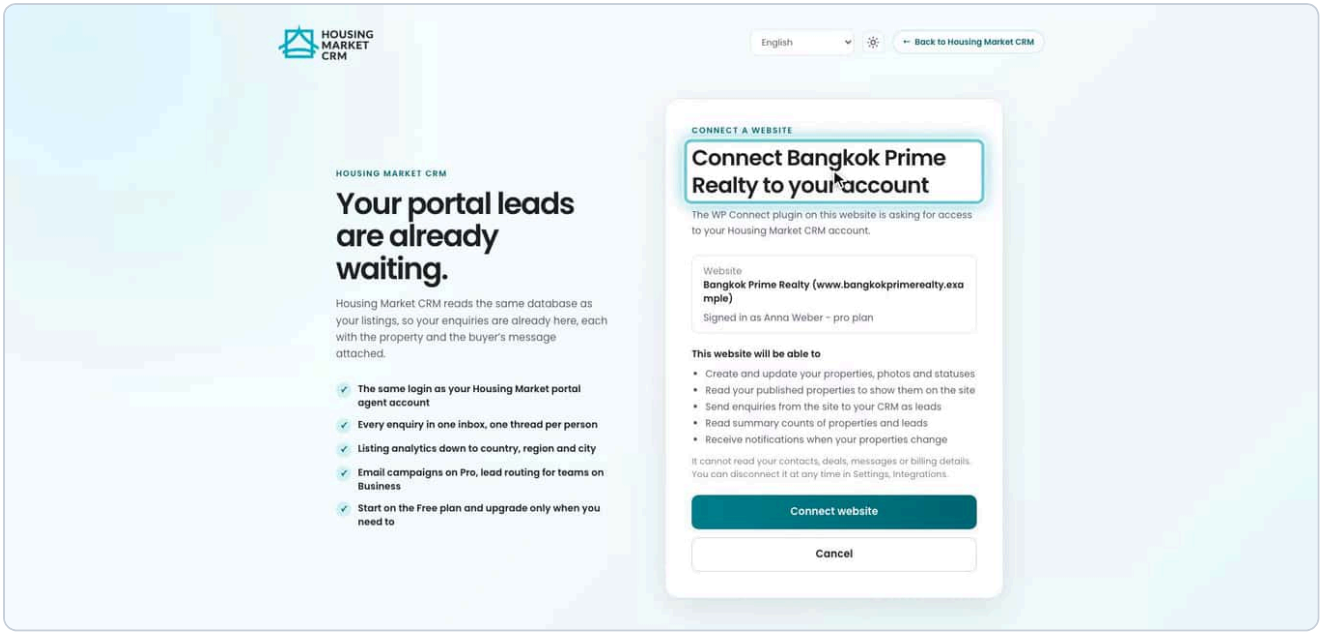


Figure 168.11 · Screen recorded 4 November 2026

12 These are the things it will be able to do.

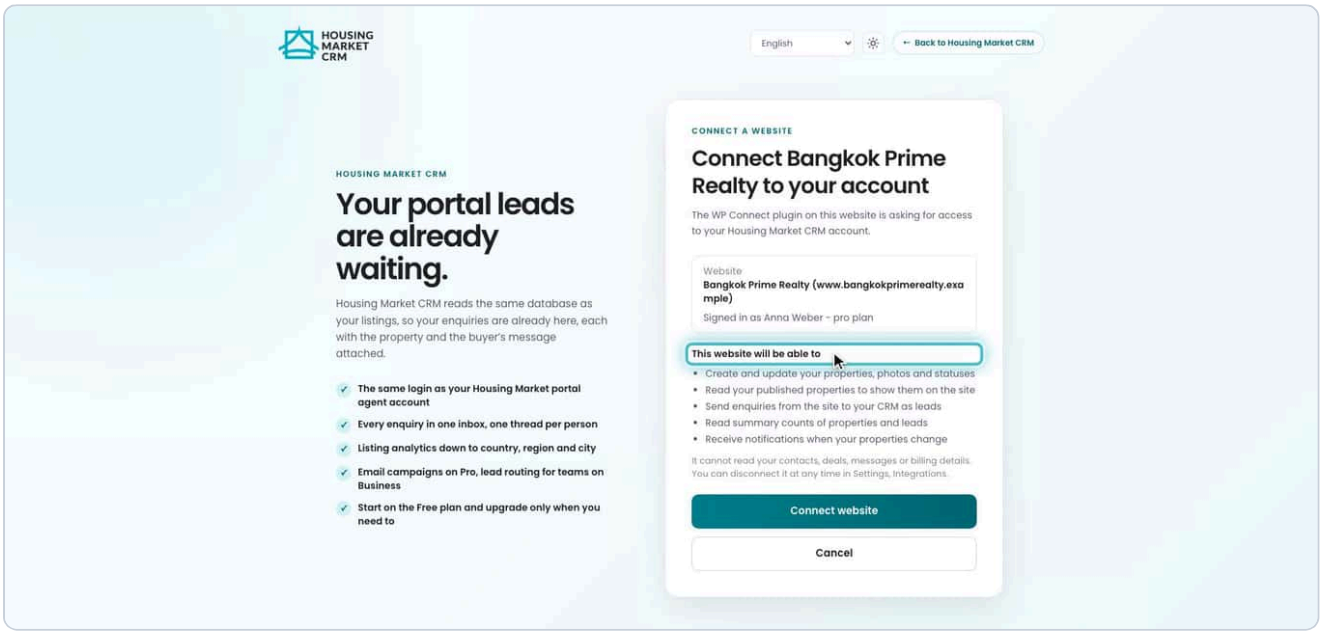


Figure 168.12 · Screen recorded 4 November 2026

13 It **cannot** read your contacts, deals, messages or billing details.

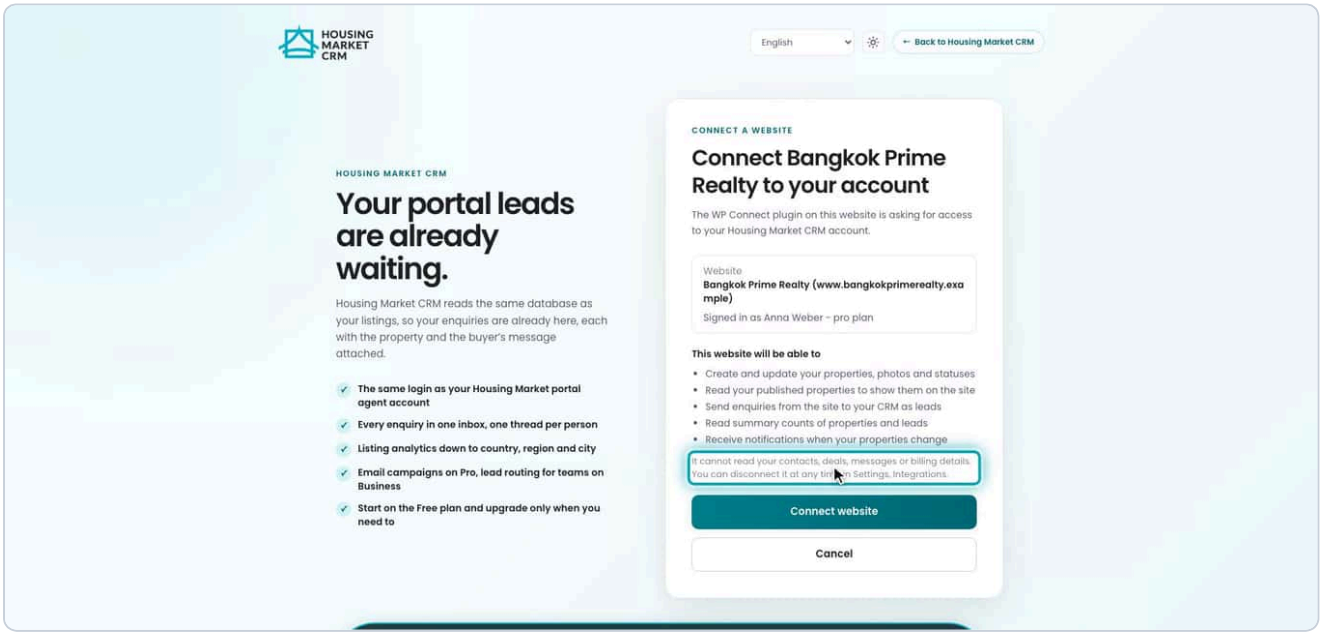


Figure 168.13 · Screen recorded 4 November 2026

14 If it is your website, click **Connect website**.

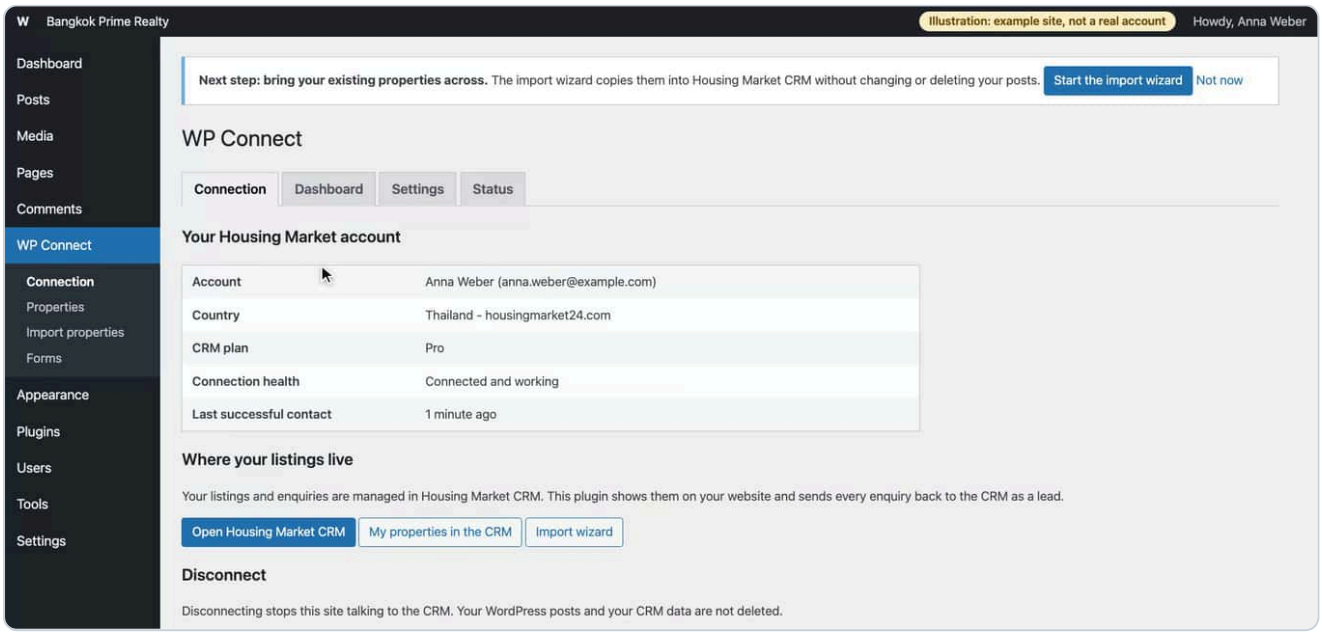


Figure 168.14 · Screen recorded 4 November 2026

15 Back in WordPress: your **account**, **country** and **plan** and the **health** of the connection.

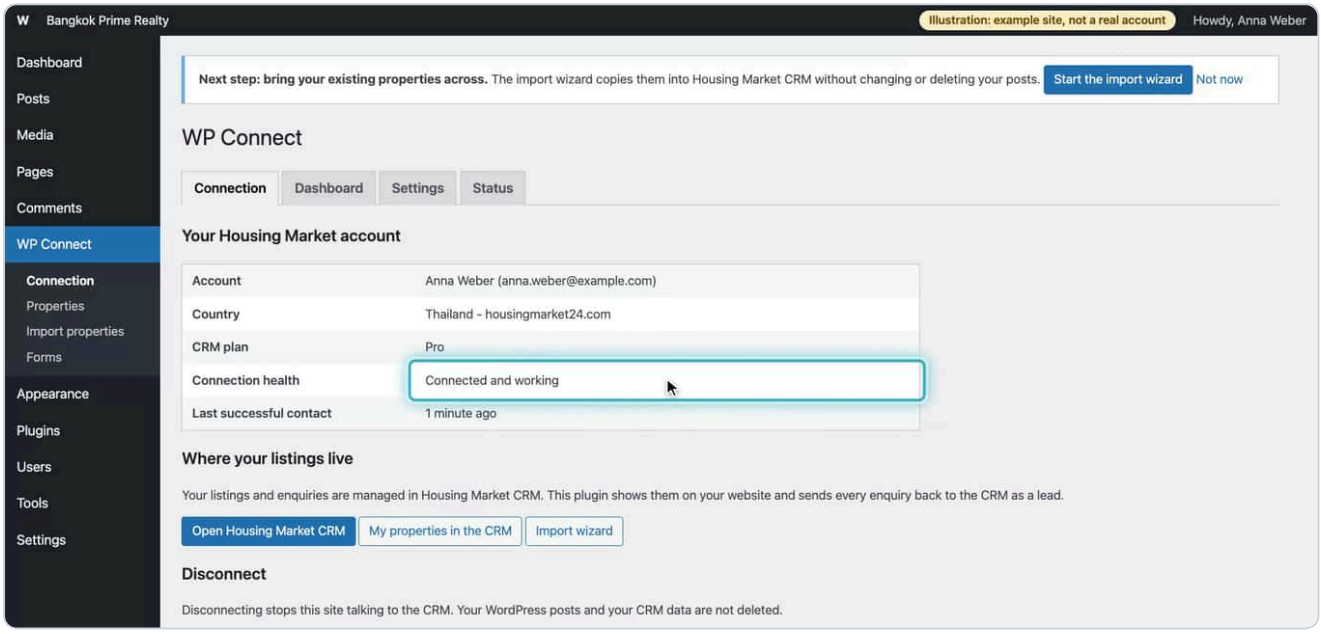


Figure 168.15 · Screen recorded 4 November 2026

16 Next, the **import wizard** offers to bring your properties across.

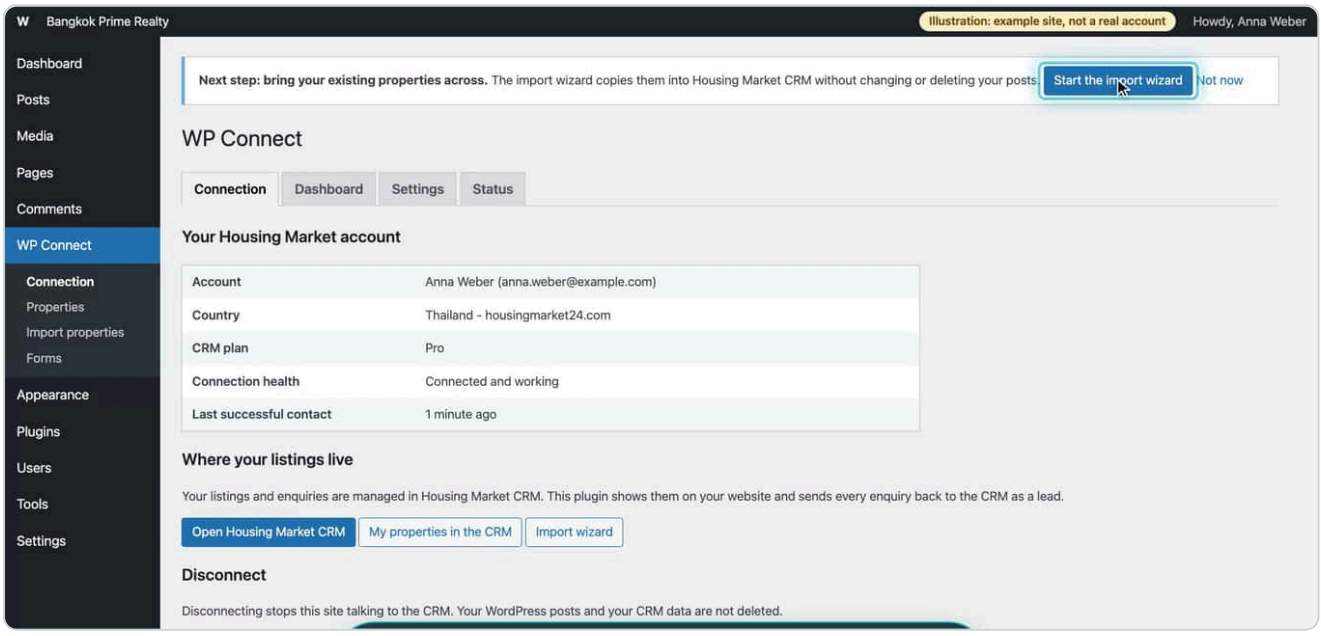


Figure 168.16 · Screen recorded 4 November 2026

17 You can **disconnect** here at any time.

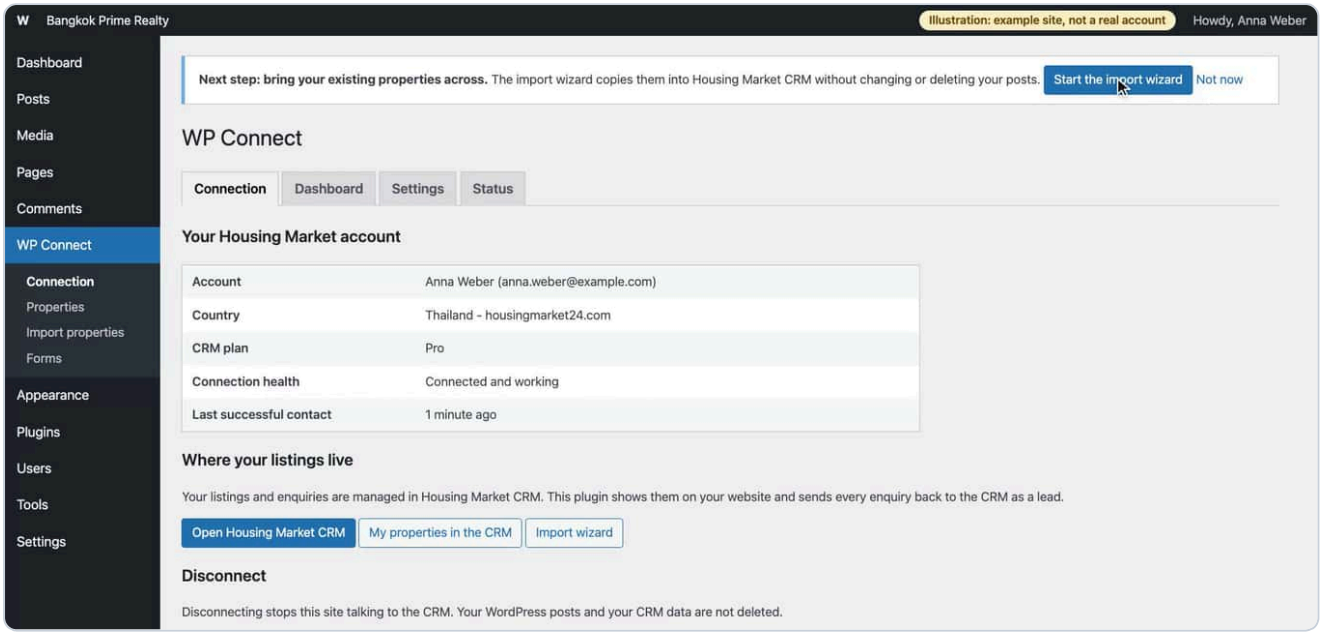


Figure 168.17 · Screen recorded 4 November 2026

18 Your WordPress posts and your CRM data are **not deleted**.

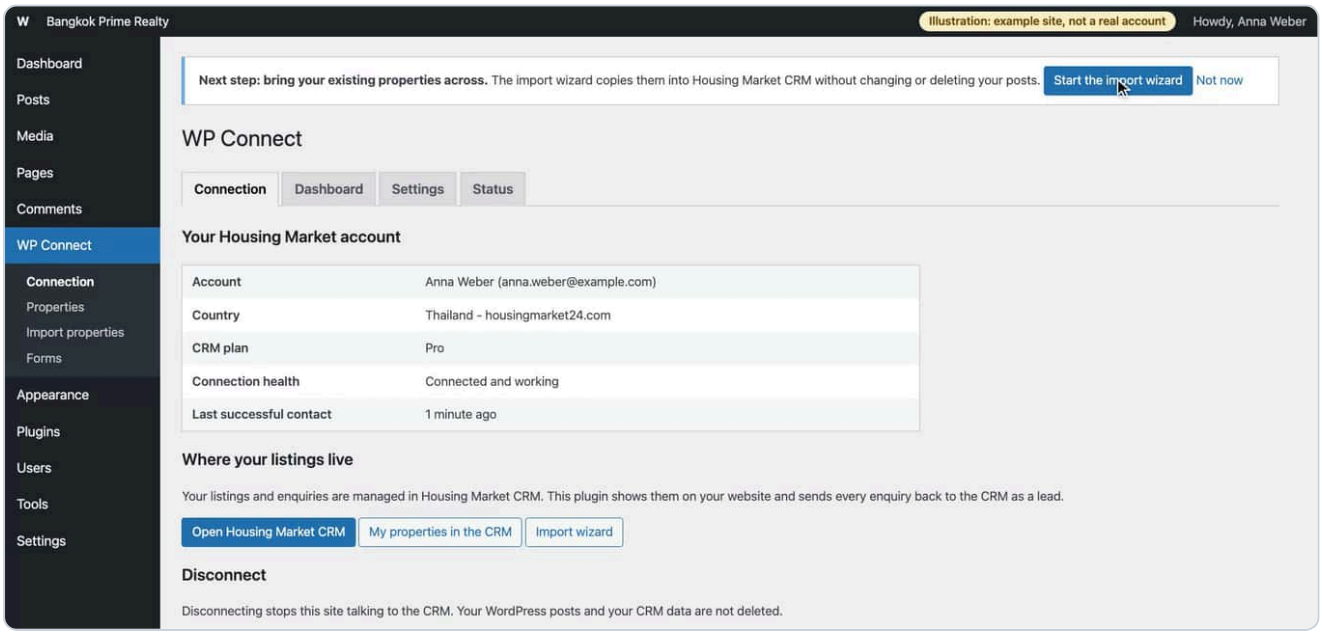


Figure 168.18 · Screen recorded 4 November 2026

RELATED HELP CENTER ARTICLES

What is a property website in the CRM?	faq.housingmarketgroup.com/faq/what-is-a-property-website-in-the-crm
Which WordPress property themes can the plugin import?	faq.housingmarketgroup.com/faq/which-wordpress-property-themes-can-the-plugin-import

169 CHAPTER 169

Import your listings into WordPress

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

No. Your original posts are never deleted. After the import you choose to keep them, make them drafts, or redirect their old addresses to the new pages.

No. The plugin copies your properties into the CRM; it does not remove the posts they came from. In the wizard's options step you choose what happens to your original posts afterwards:

- Keep them as they are.
- Make them drafts.
- Redirect their old addresses to the new property pages, with a permanent (301) redirect.

Running the import again is safe: each post is matched to its CRM property, so nothing is duplicated. Before the first run, the preview shows exactly what would be sent, and nothing is sent until you continue.

From the Help Center: **Will the WordPress plugin delete my existing properties?**

STEP BY STEP

1 Once connected, WP Connect offers to **bring your properties across**.

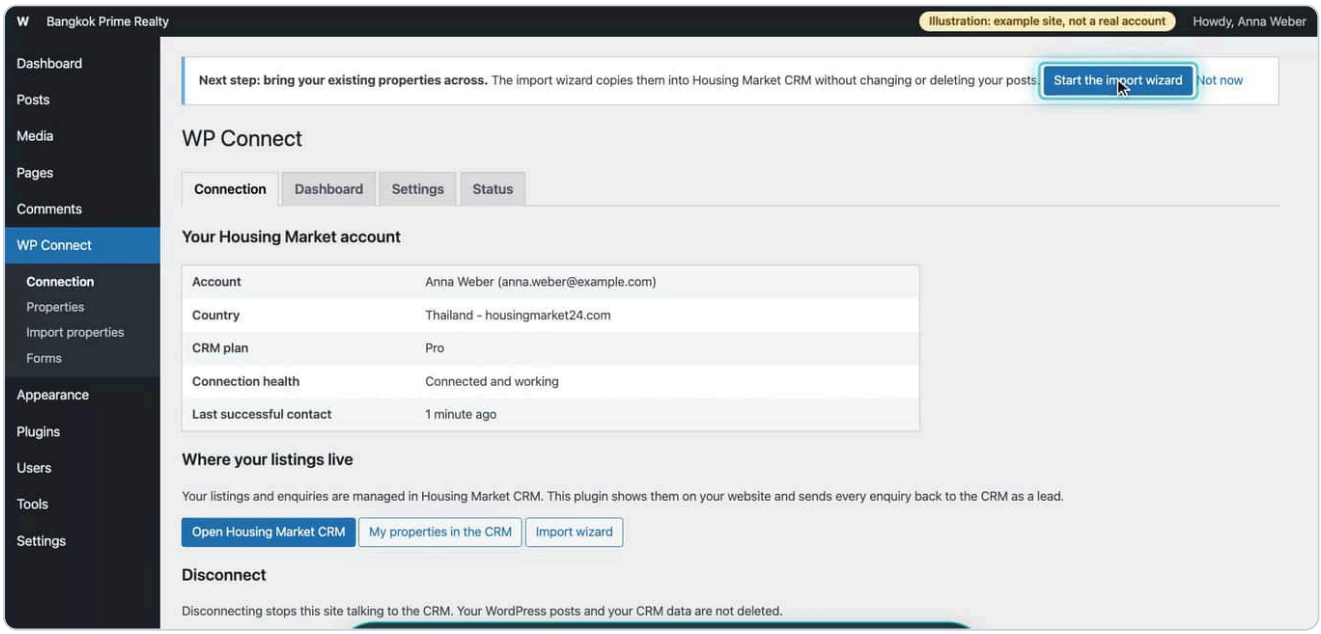


Figure 169.1 · Screen recorded 4 November 2026

2 The wizard copies them into your CRM **without changing or deleting** your posts.

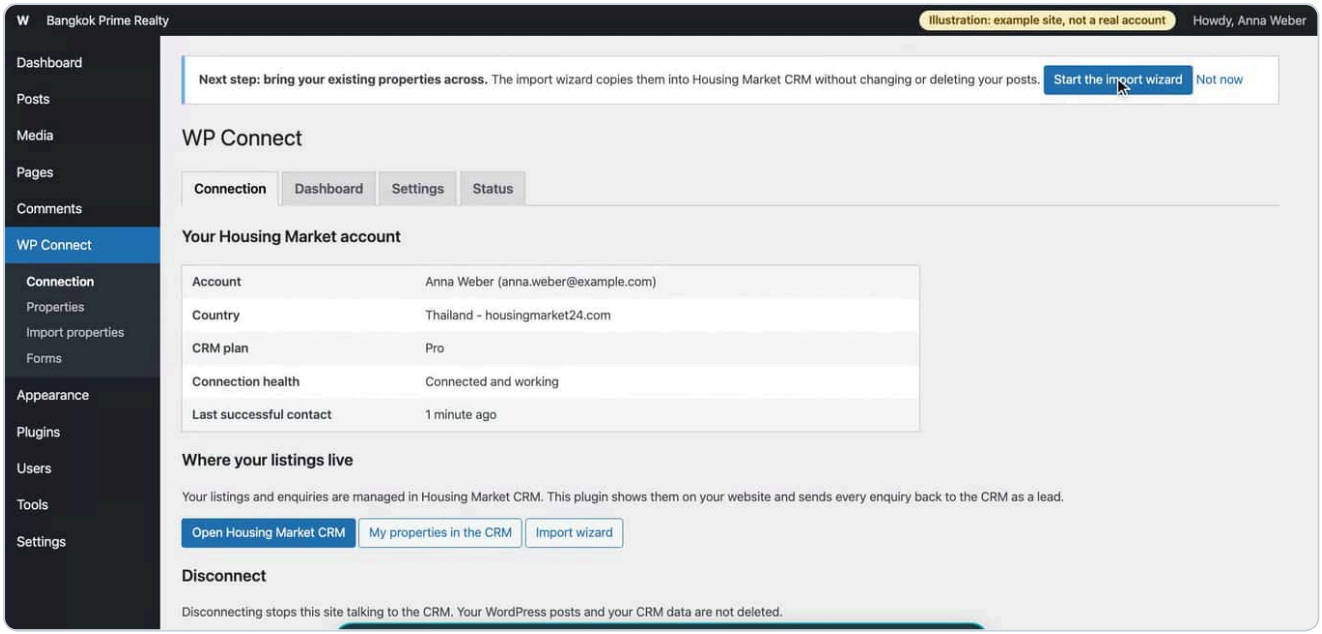


Figure 169.2 · Screen recorded 4 November 2026

3 Click **Start the import wizard**.

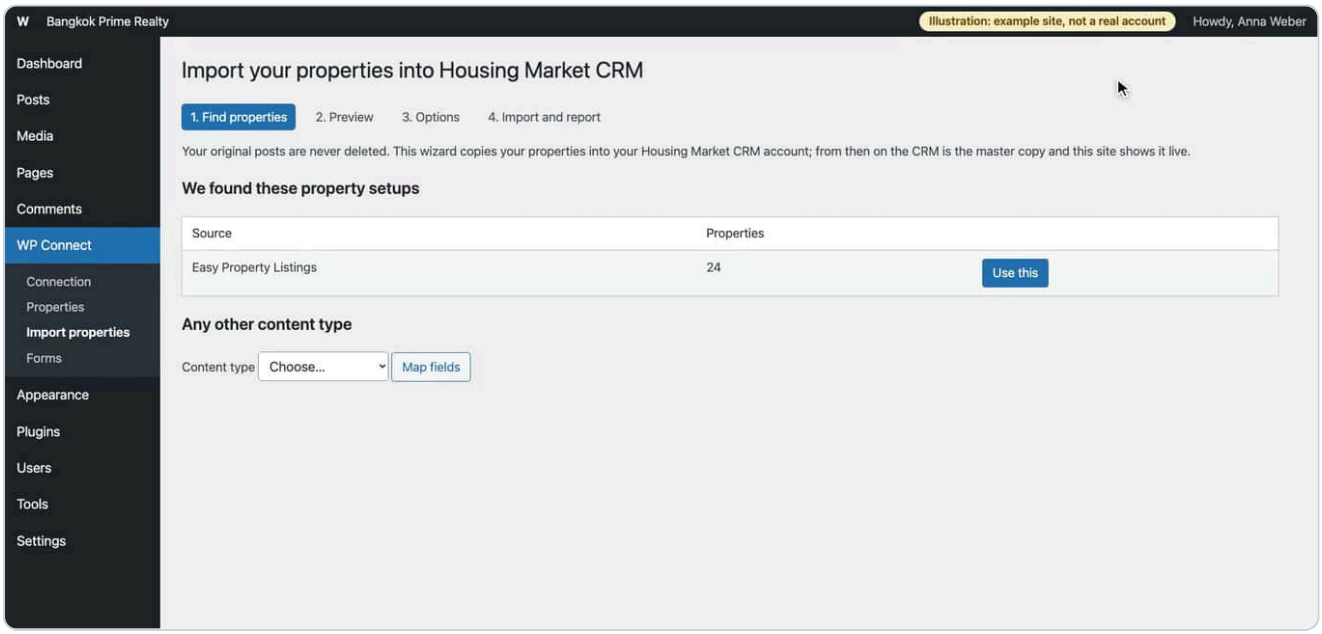


Figure 169.3 · Screen recorded 4 November 2026

4 Four steps: **find**, **preview**, **options**, **import and report**.

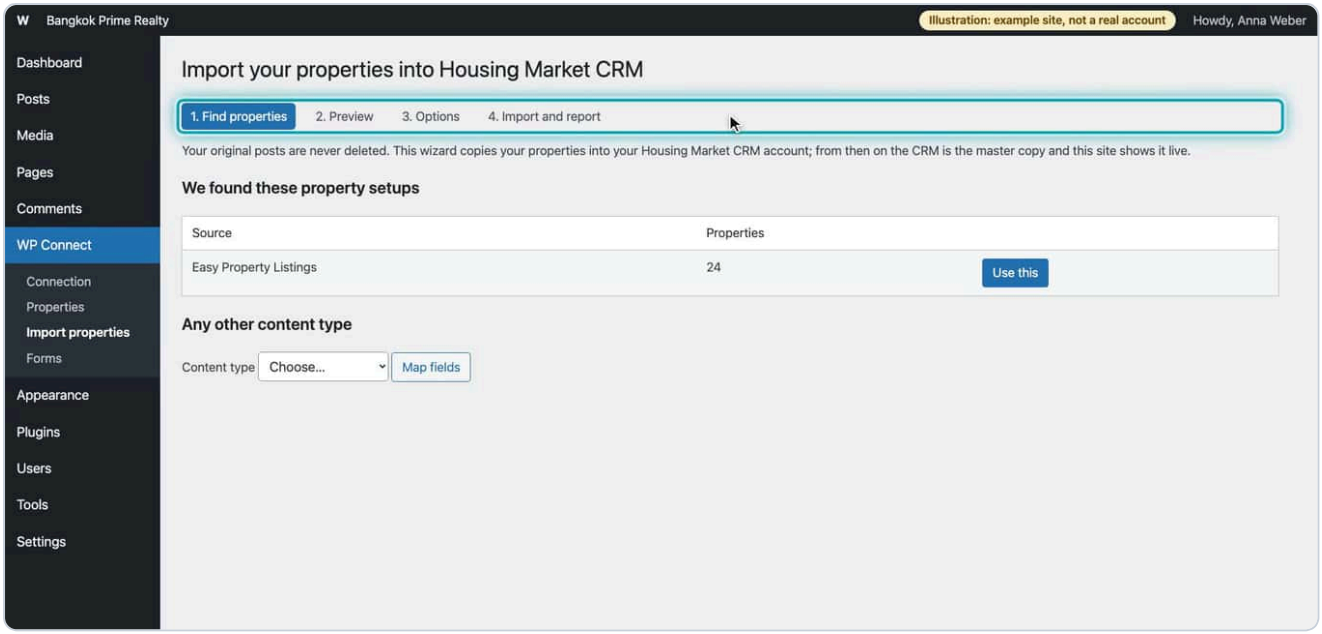


Figure 169.4 · Screen recorded 4 November 2026

5 Your original posts are **never deleted**.

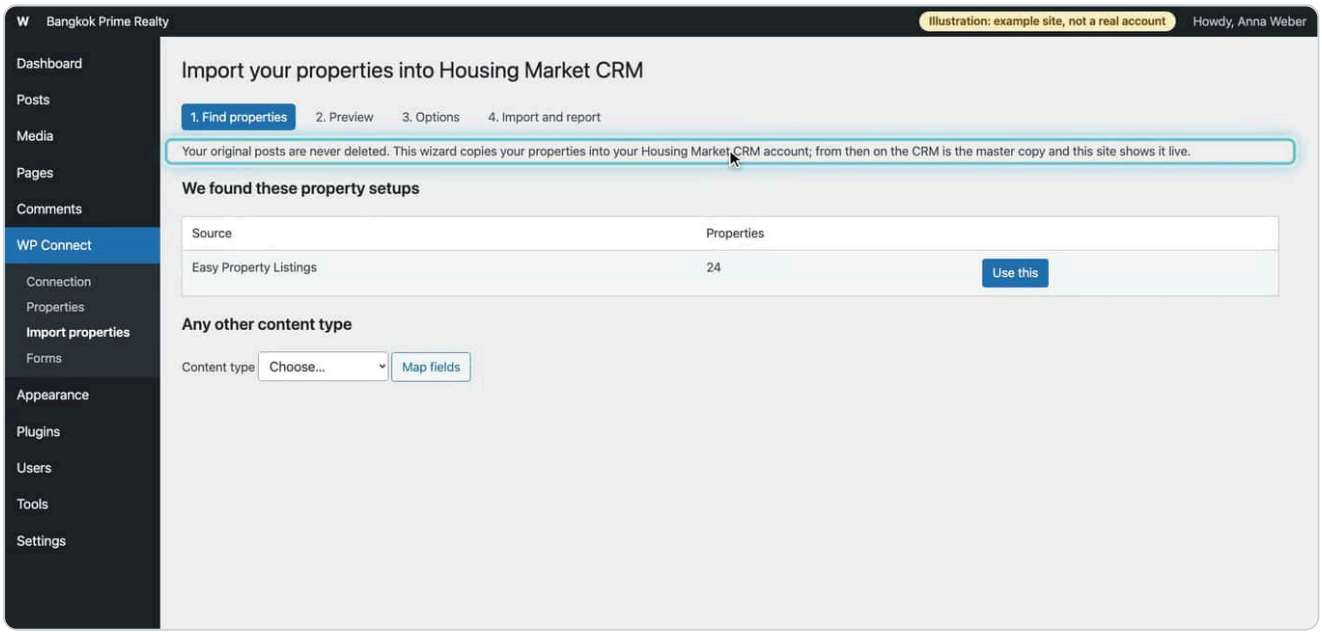


Figure 169.5 · Screen recorded 4 November 2026

6 The wizard has found your **property setup** and how many properties it holds.

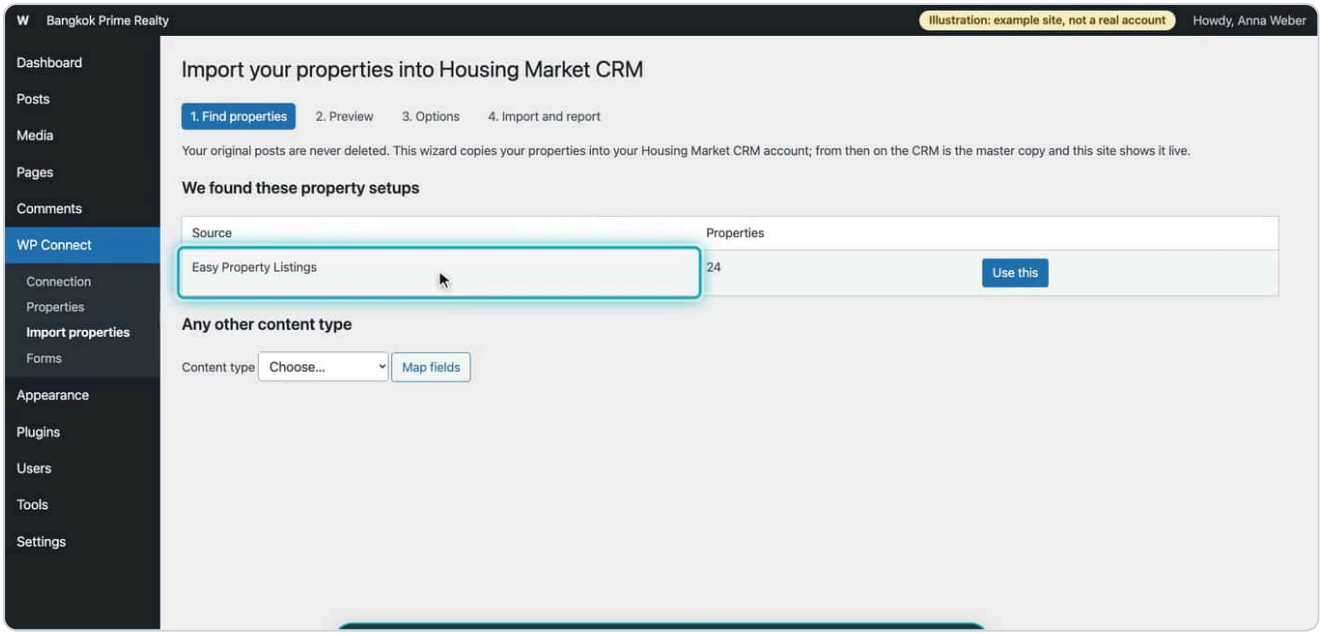


Figure 169.6 · Screen recorded 4 November 2026

7 Click **Use this**.

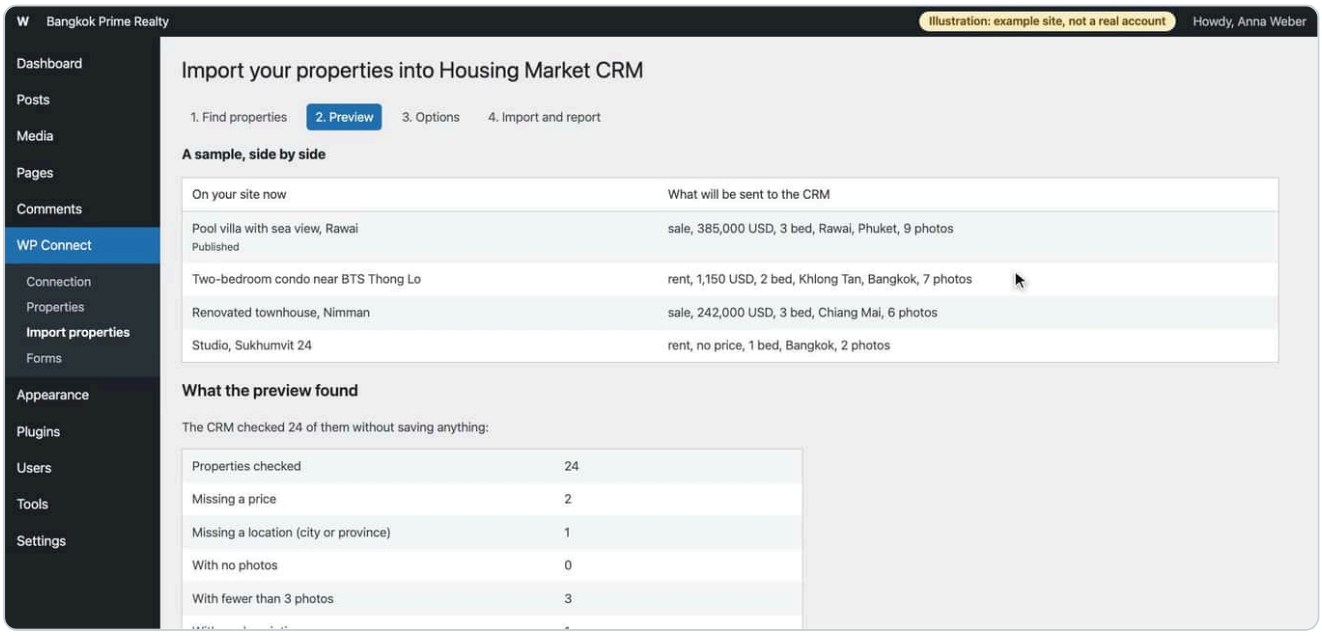


Figure 169.7 · Screen recorded 4 November 2026

8 A sample: what is on your site now, and what will be sent to the CRM.

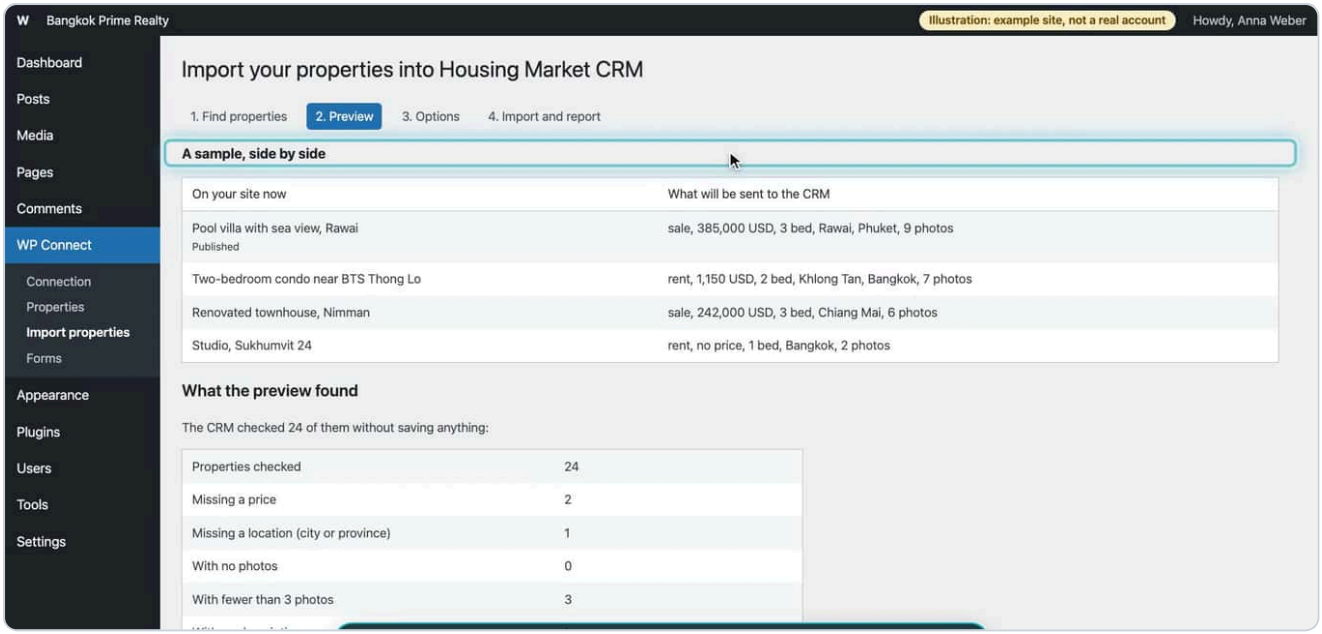


Figure 169.8 · Screen recorded 4 November 2026

9 The CRM checks every property without saving anything.

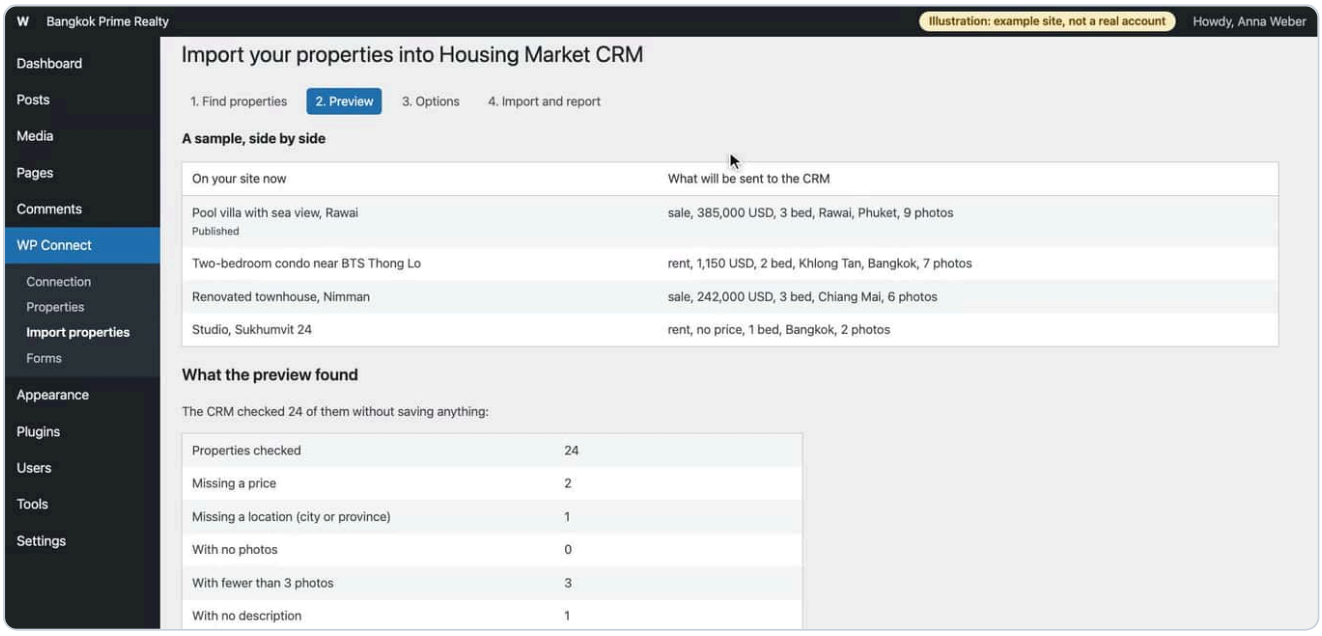


Figure 169.9 · Screen recorded 4 November 2026

10 Missing prices, missing locations, few photos, no description.

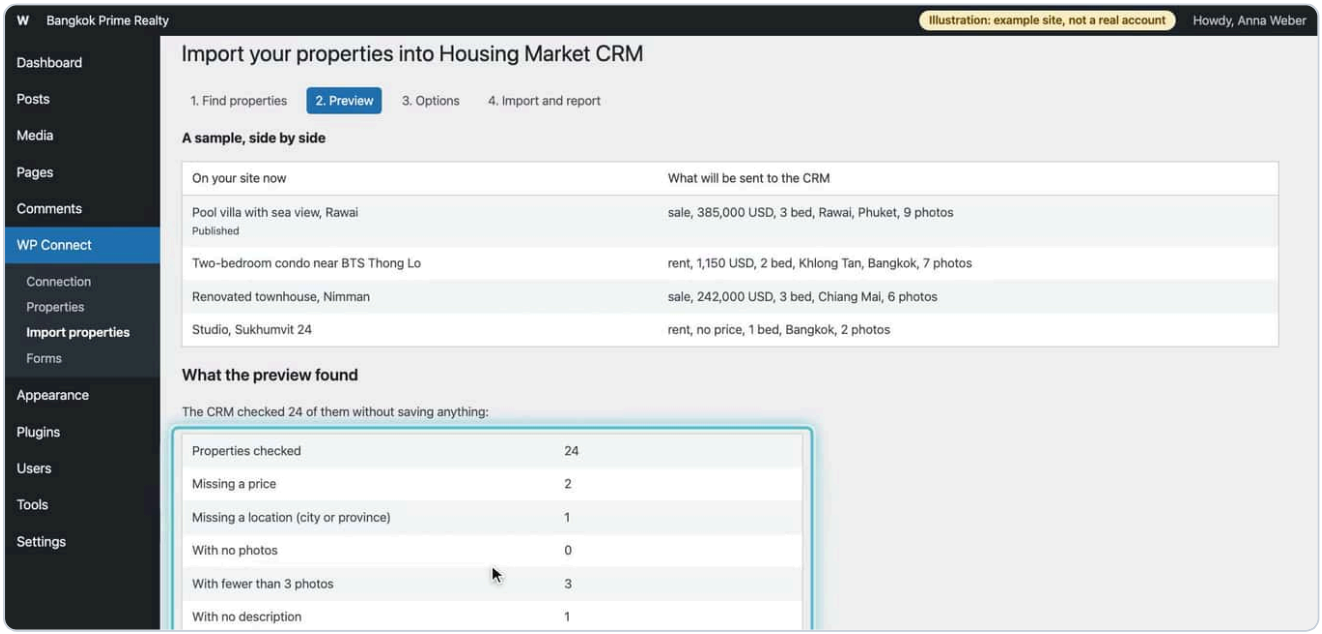


Figure 169.10 · Screen recorded 4 November 2026

11 Properties with gaps **stay in the CRM**, flagged with the reason.

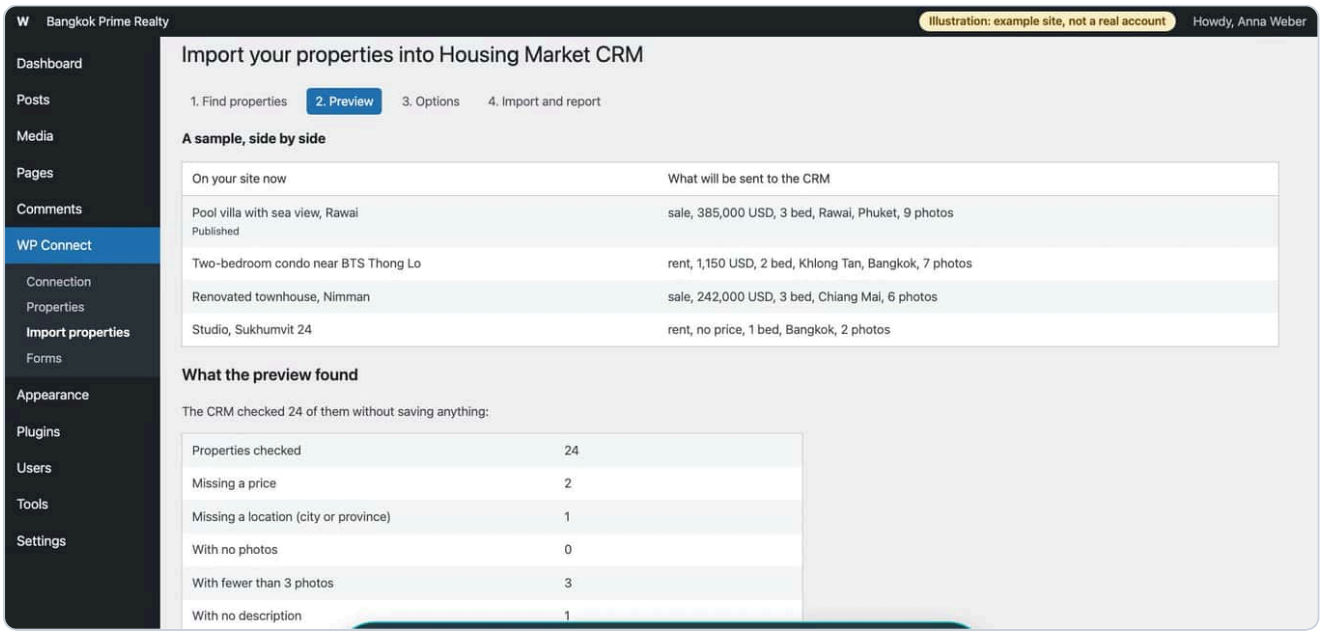


Figure 169.11 · Screen recorded 4 November 2026

12 Click **Continue**.

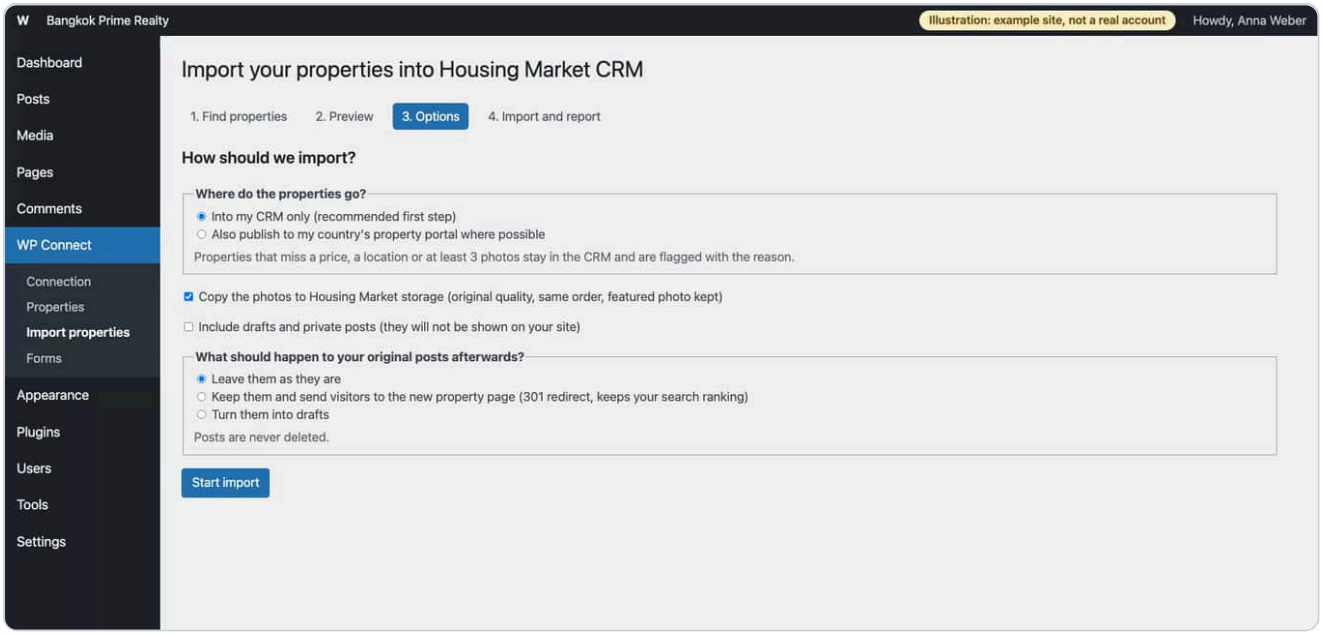


Figure 169.12 · Screen recorded 4 November 2026

13 Choose **where the properties go**. Into my CRM only is the safe first step.

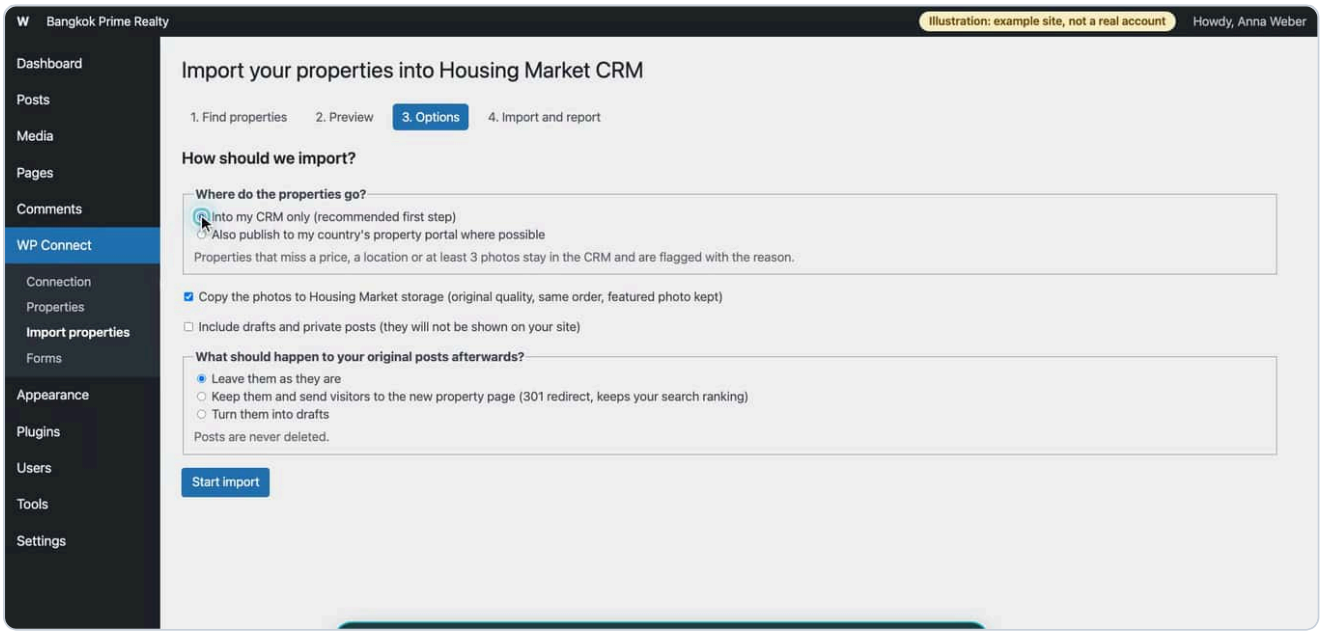


Figure 169.13 · Screen recorded 4 November 2026

14 You can also publish to your **country portal** where possible.

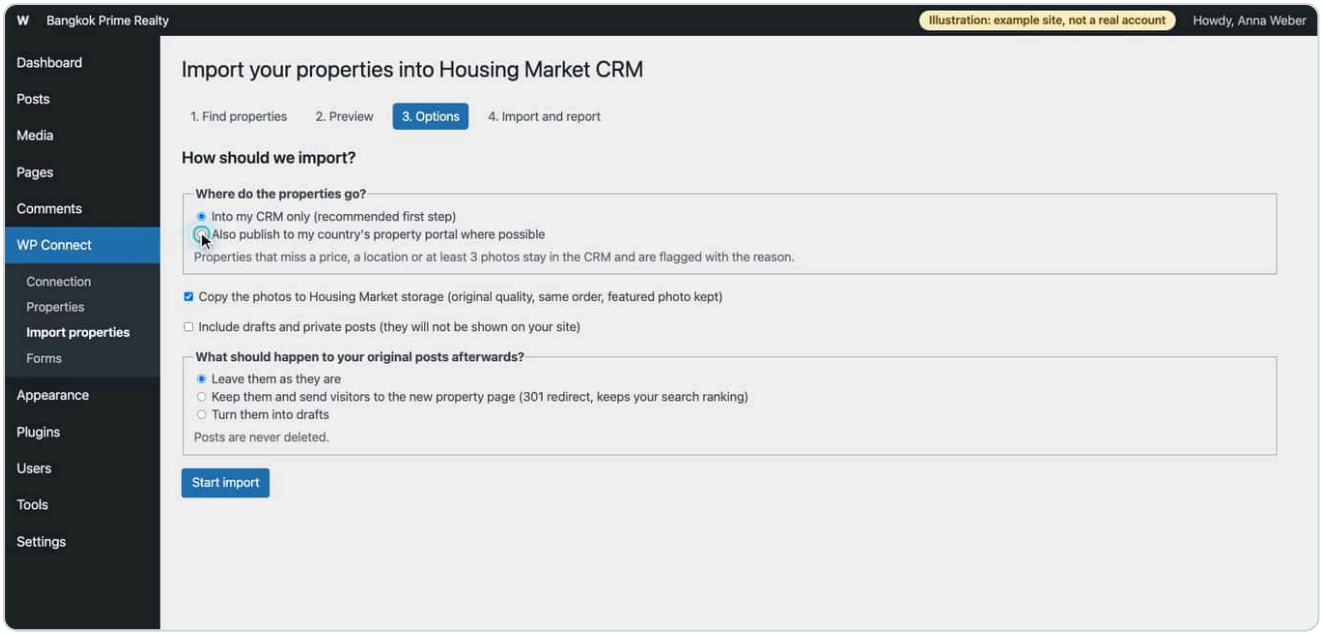


Figure 169.14 · Screen recorded 4 November 2026

15 Photos are copied in **original quality**, in the same order.

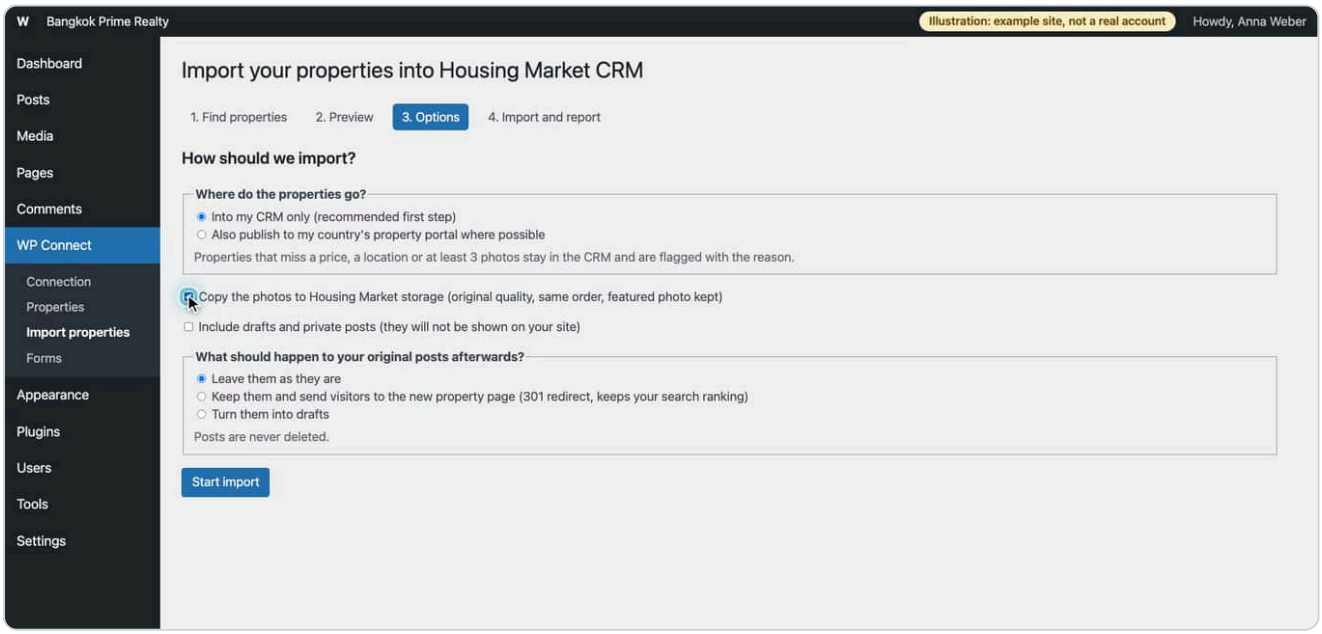


Figure 169.15 · Screen recorded 4 November 2026

16 Then decide what happens to your **original posts**.

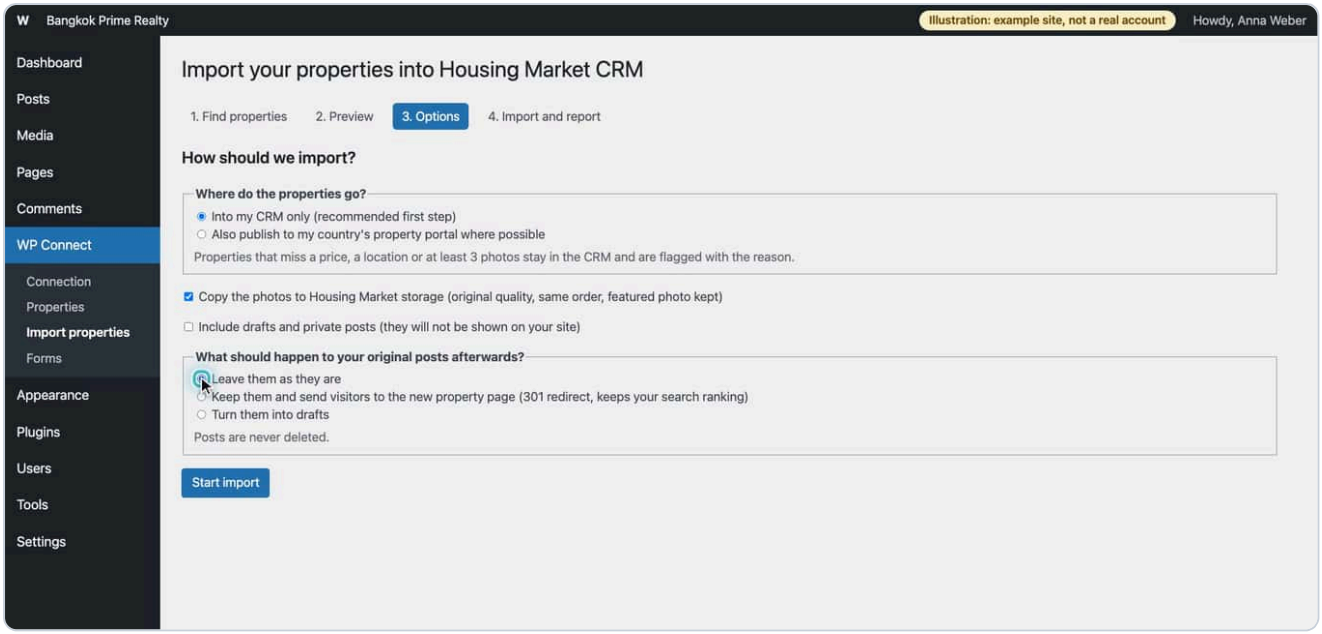


Figure 169.16 · Screen recorded 4 November 2026

17 Whatever you choose, **posts are never deleted**.

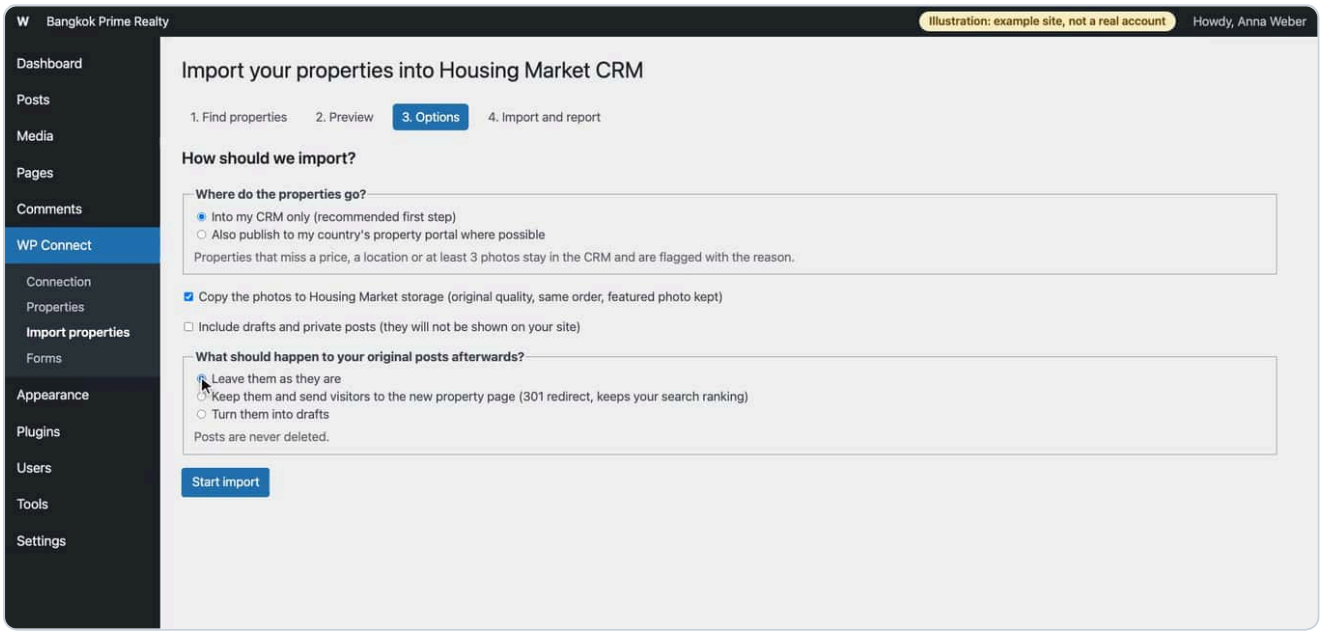


Figure 169.17 · Screen recorded 4 November 2026

18 Click **Start import**.

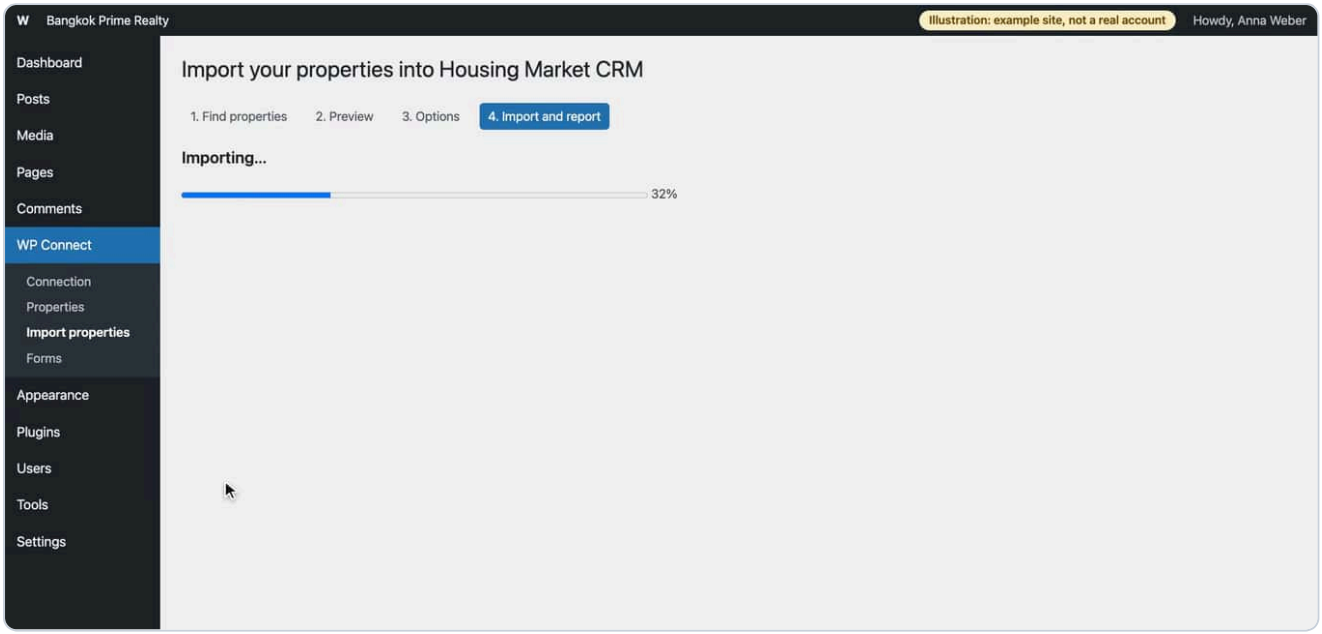


Figure 169.18 · Screen recorded 4 November 2026

19 The import runs, and shows its **progress**.

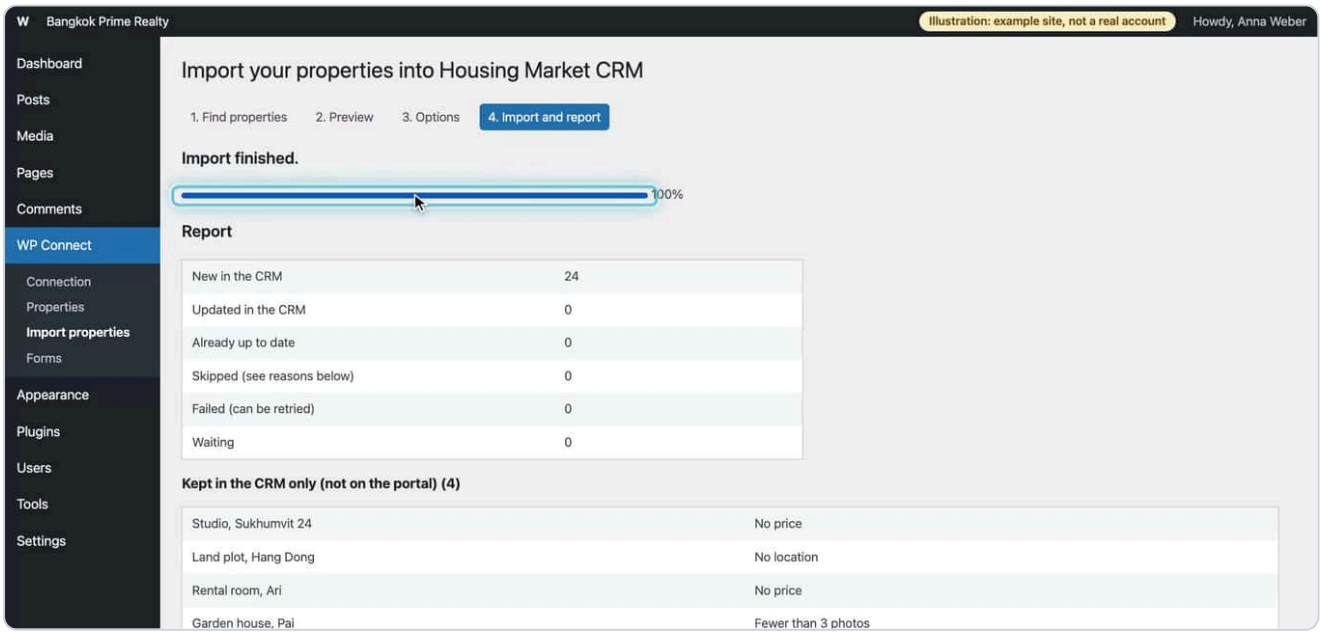


Figure 169.19 · Screen recorded 4 November 2026

20 The report counts what is new, updated, skipped or failed.

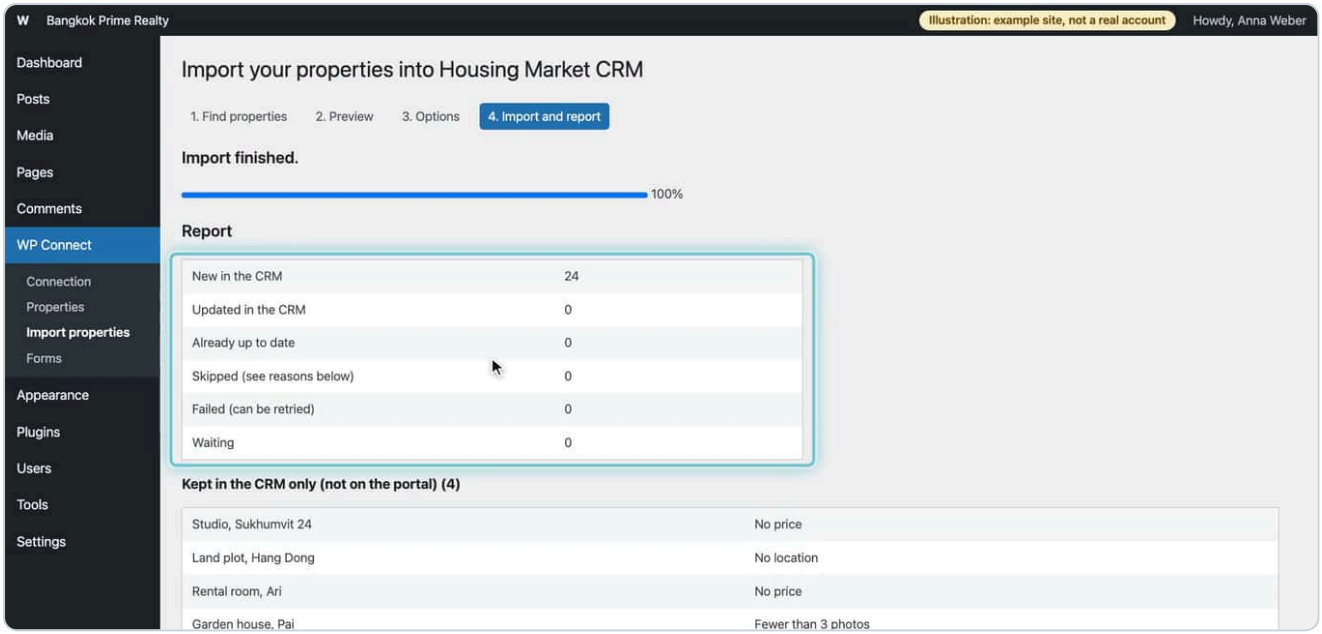


Figure 169.20 · Screen recorded 4 November 2026

21 Properties kept in the CRM only are listed with the reason.

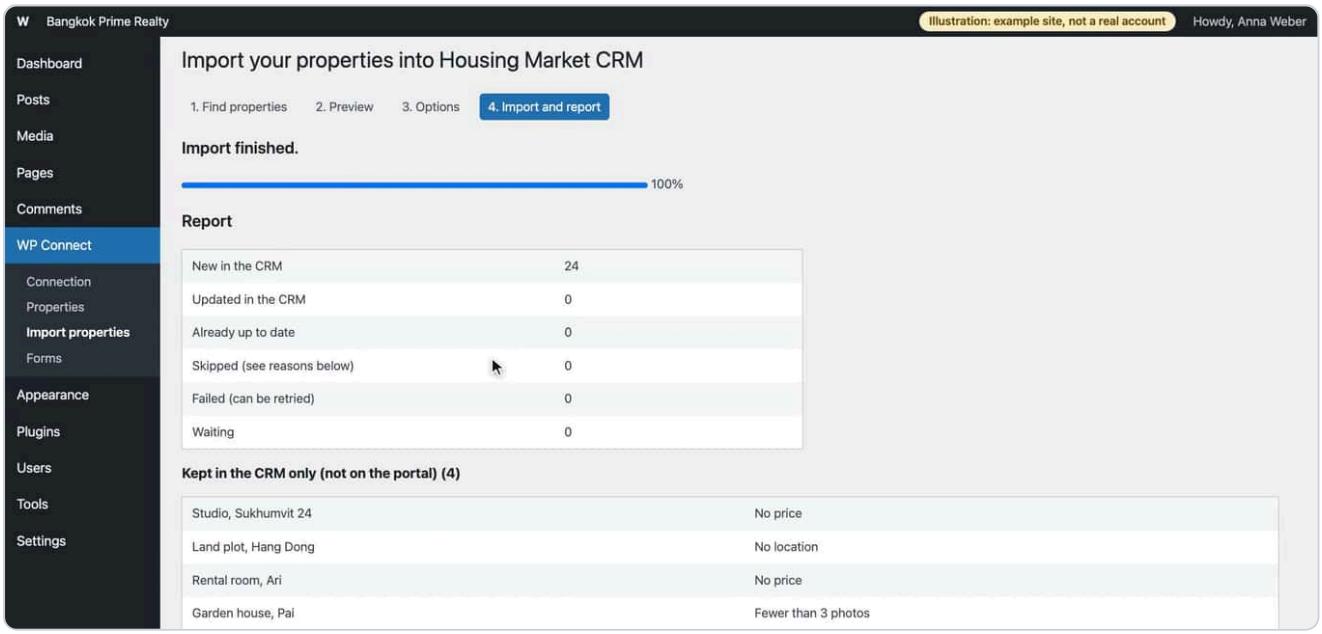


Figure 169.21 · Screen recorded 4 November 2026

22 Download the **full report** as a CSV file.

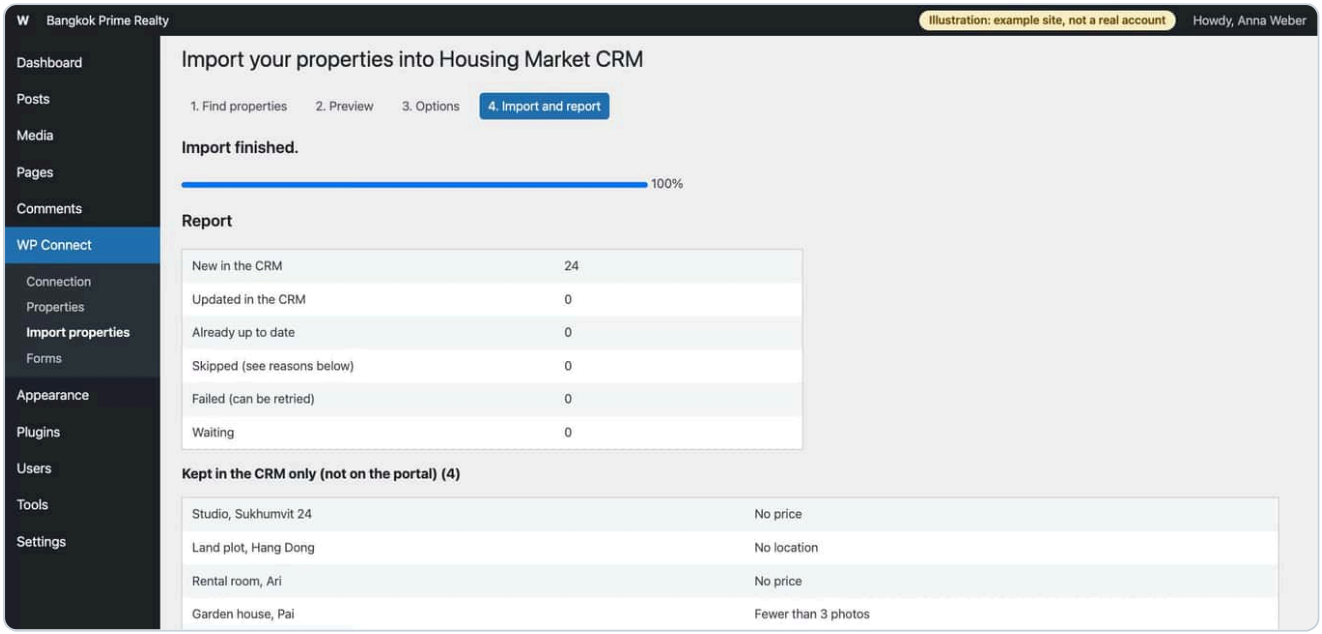


Figure 169.22 · Screen recorded 4 November 2026

23 Then open **My Properties** in the CRM to review them.

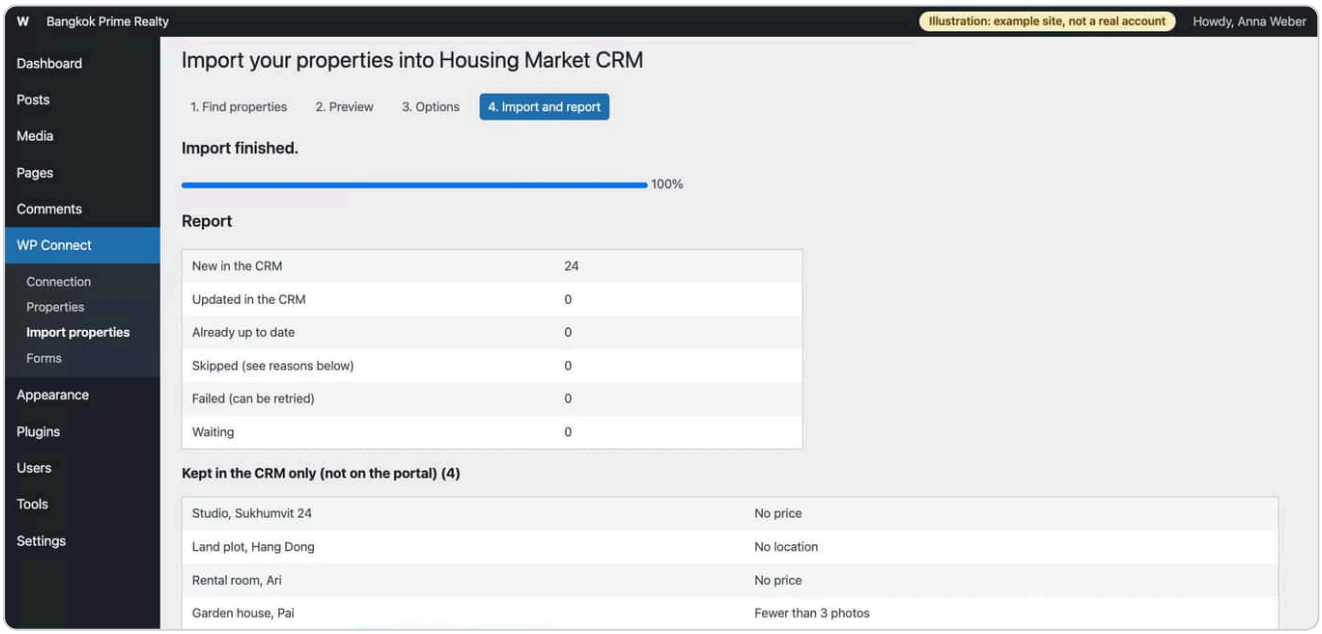


Figure 169.23 · Screen recorded 4 November 2026

24 From now on the **CRM is the master copy**, and your site shows it live.

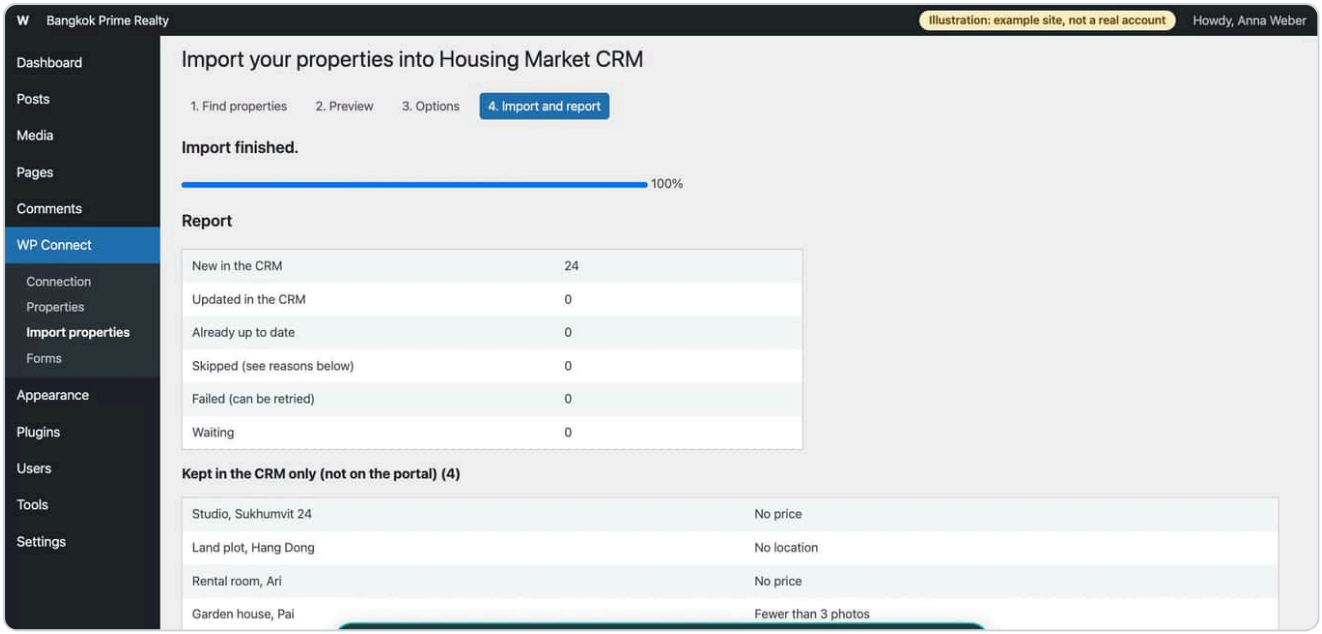


Figure 169.24 · Screen recorded 4 November 2026

RELATED HELP CENTER ARTICLES

Can I import from another CRM?	faq.housingmarketgroup.com/faq/can-i-import-from-another-crm
Which WordPress property themes can the plugin import?	faq.housingmarketgroup.com/faq/which-wordpress-property-themes-can-the-plugin-import

170 CHAPTER 170

Show your properties on a WordPress site

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

The plugin builds property pages on your own domain, and gives you blocks and shortcodes for a property grid, search, featured properties, a single property, an agent card and an enquiry form.

Once your site is connected, every property you show lives on a page of your own website at /properties/, which you can change in the plugin's Settings. The pages are built by your server and include schema.org data, Open Graph tags, entries in the WordPress sitemap and permanent redirects from old addresses, so that search engines can read them. No plugin can promise a place in search results.

To place properties on your own pages, add these blocks in the WordPress editor. Each also exists as a shortcode:

- Property grid and Property search.
- Featured properties.
- Property detail.
- Agent card.
- Enquiry form.
- Property location and Similar properties.

The CRM is the master copy. Edit a property in My Properties and your website follows within minutes. A property that is sold or rented shows a badge.

From the Help Center: **How do I show my CRM properties on my WordPress site?**

STEP BY STEP

1 In **WP Connect**, **Properties** lists what your CRM holds.

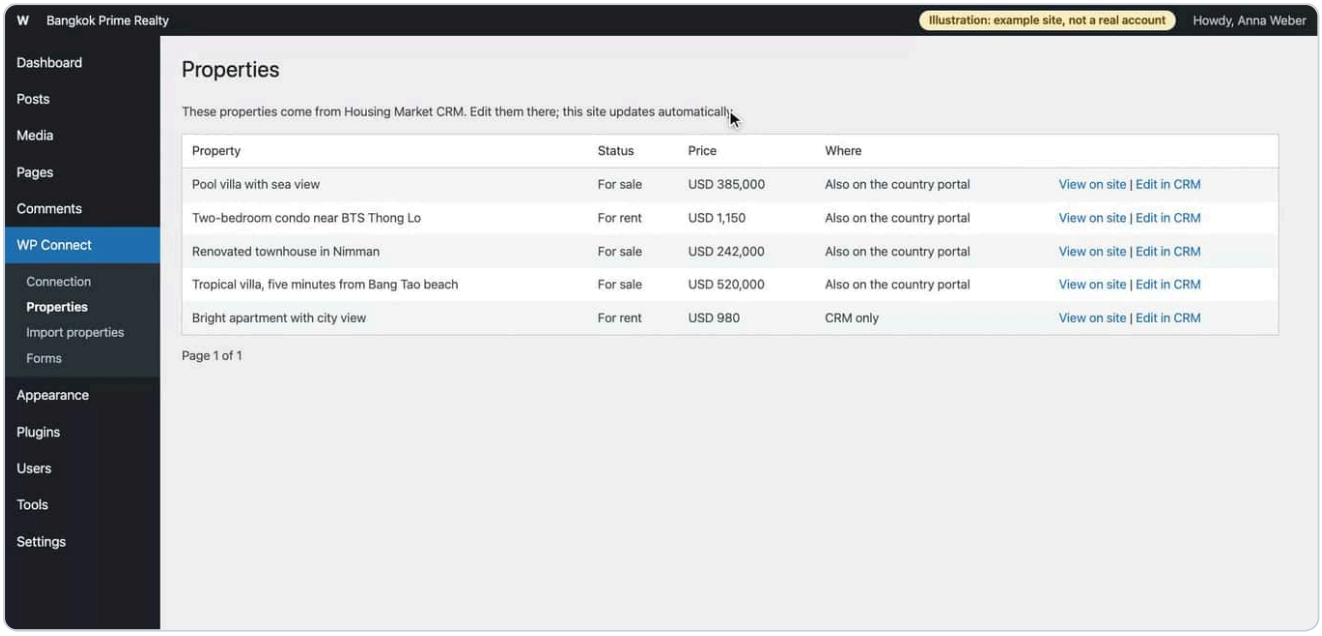


Figure 170.1 · Screen recorded 4 November 2026

2 You **edit them in the CRM**, and this site updates by itself.

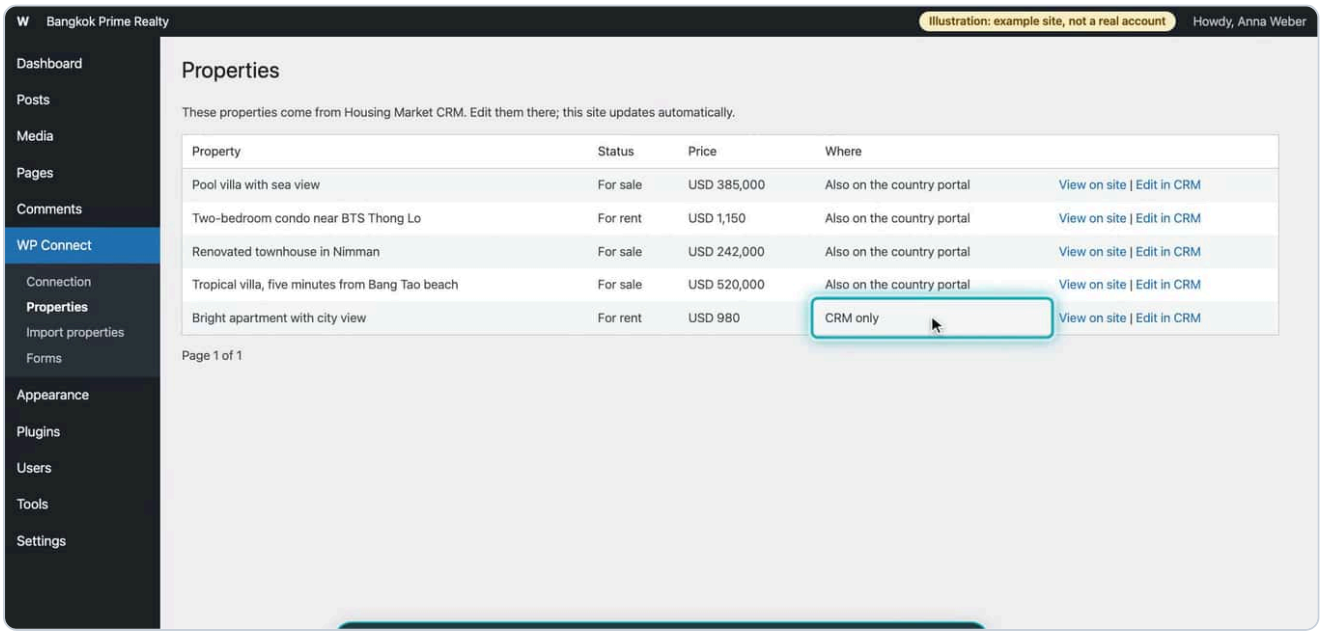


Figure 170.2 · Screen recorded 4 November 2026

3 It also shows which ones are **on the country portal** and which stay in the CRM.

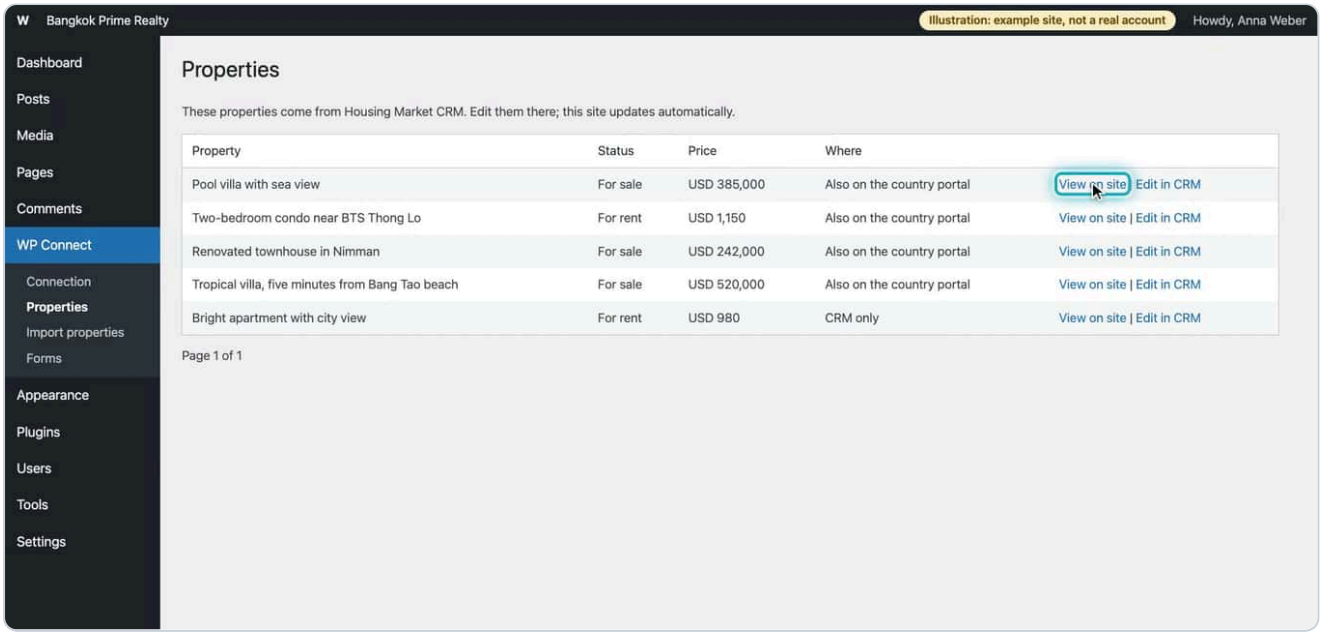


Figure 170.3 · Screen recorded 4 November 2026

4 Click **View on site**.

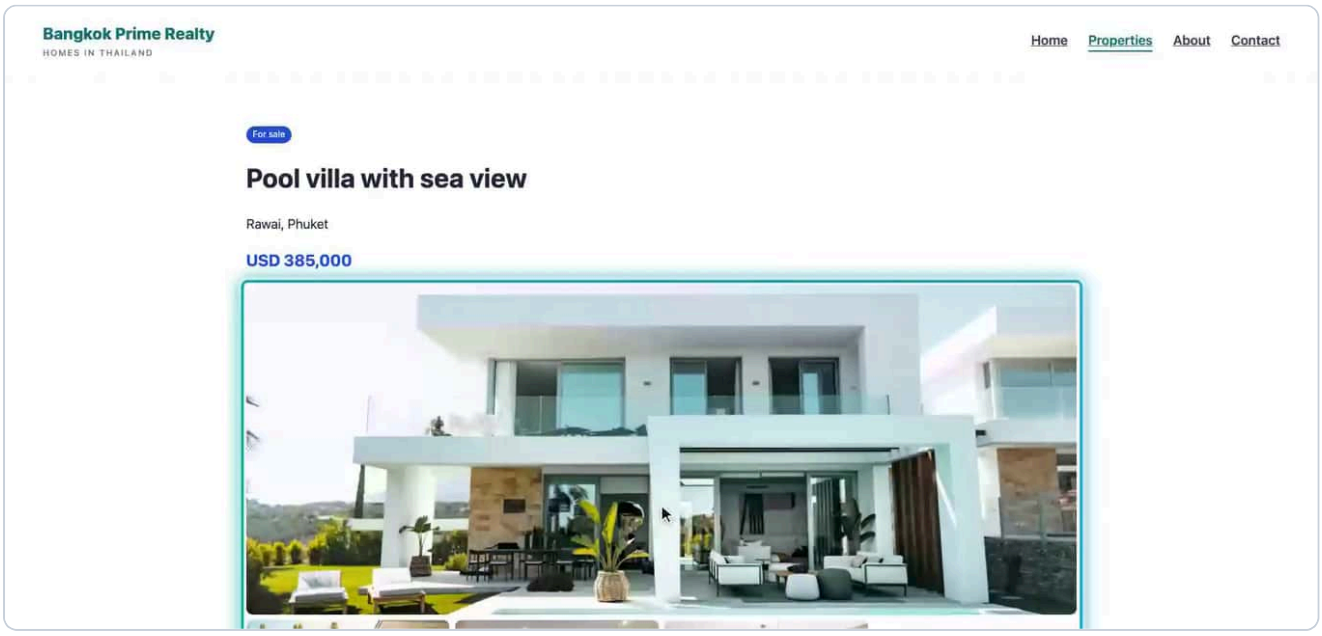


Figure 170.4 · Screen recorded 4 November 2026

5 Each property has **its own page**, with photos and its facts, taken from the CRM.

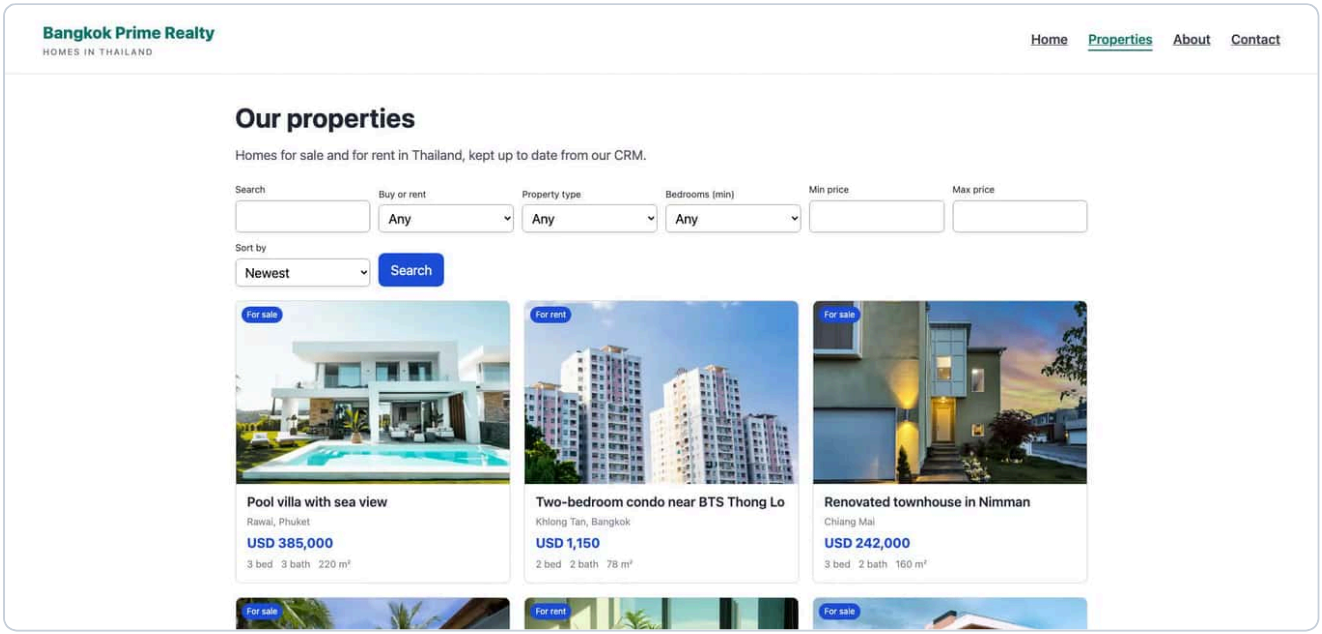


Figure 170.5 · Screen recorded 4 November 2026

6 All of them are listed at **/properties/**.

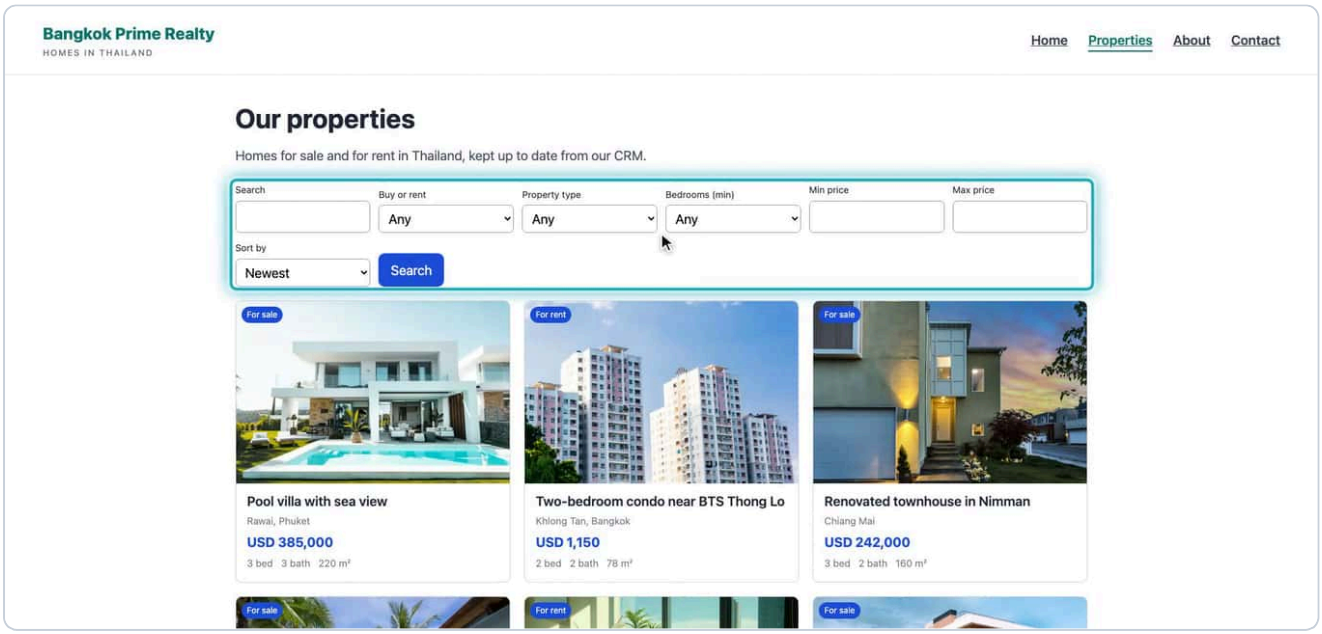


Figure 170.6 · Screen recorded 4 November 2026

7 Visitors can **search and filter**, sort and page through.

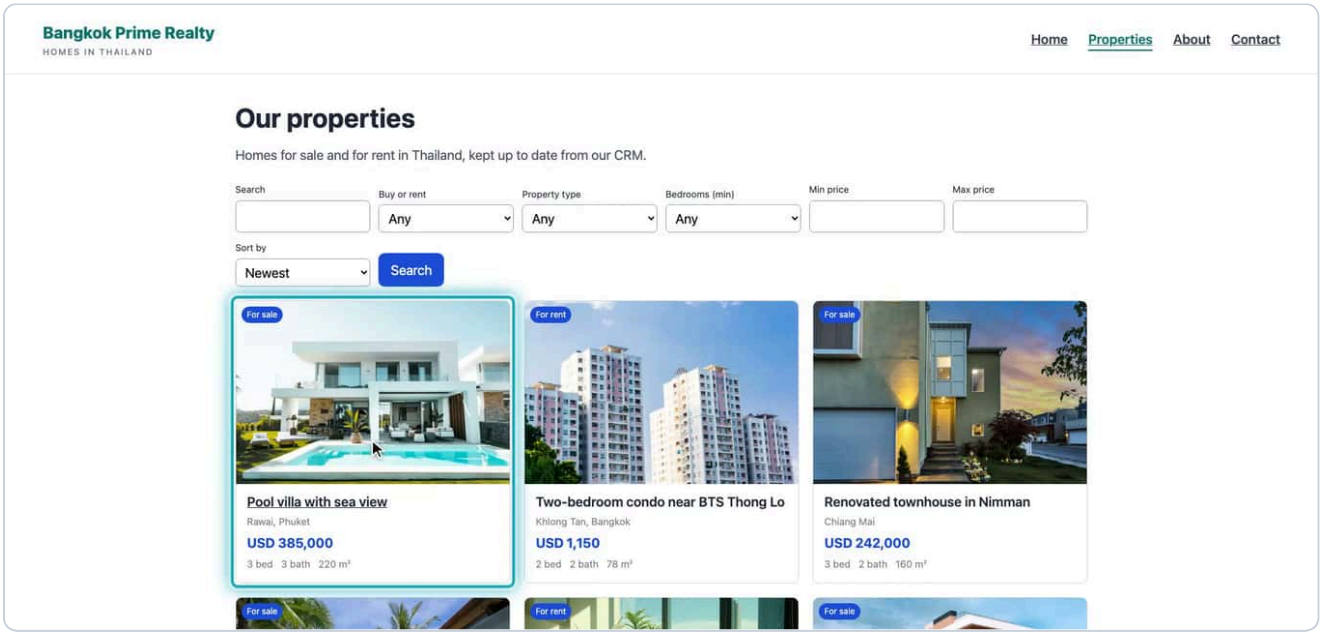


Figure 170.7 · Screen recorded 4 November 2026

8 Each card links to its property page.

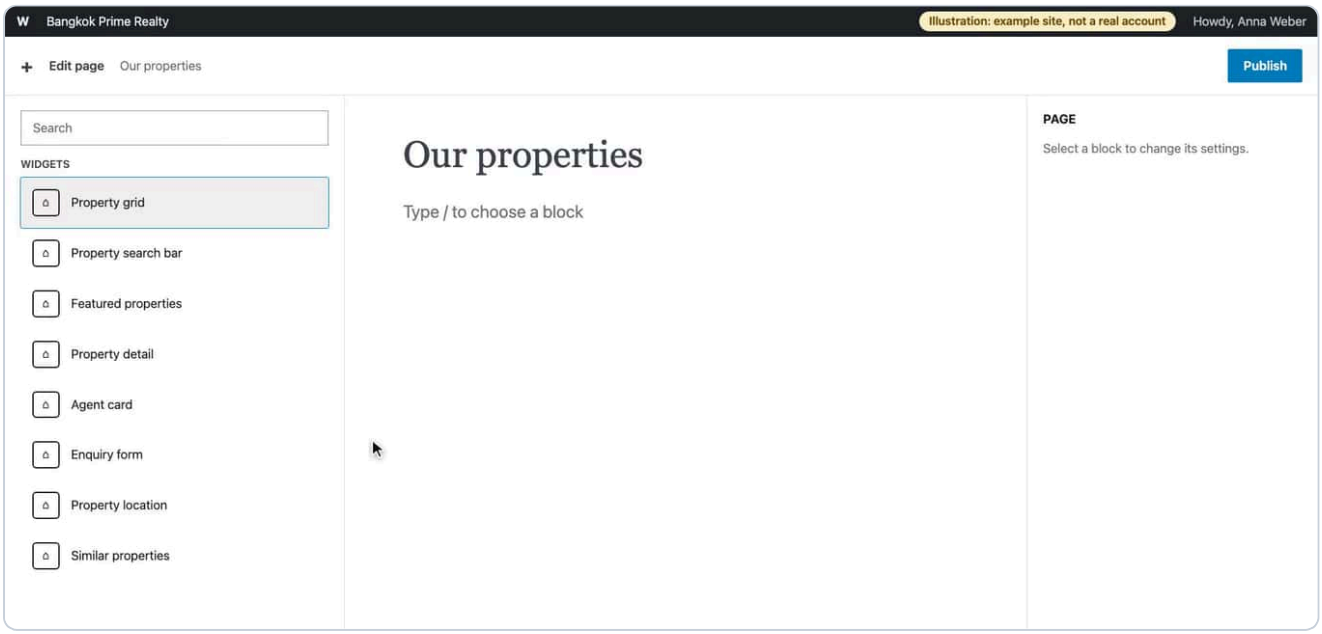


Figure 170.8 · Screen recorded 4 November 2026

9 To show properties on **any page**, open the page editor.

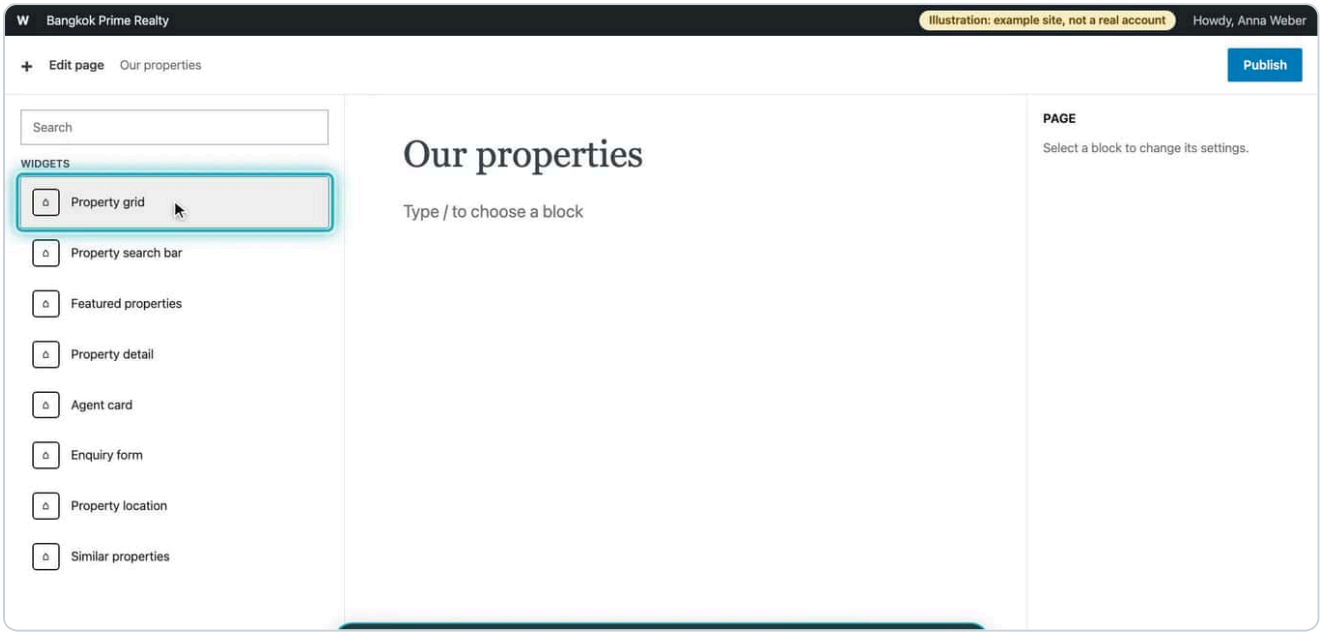


Figure 170.9 · Screen recorded 4 November 2026

10 Add the **Property grid** block. The plugin also has a search bar, featured properties and more.

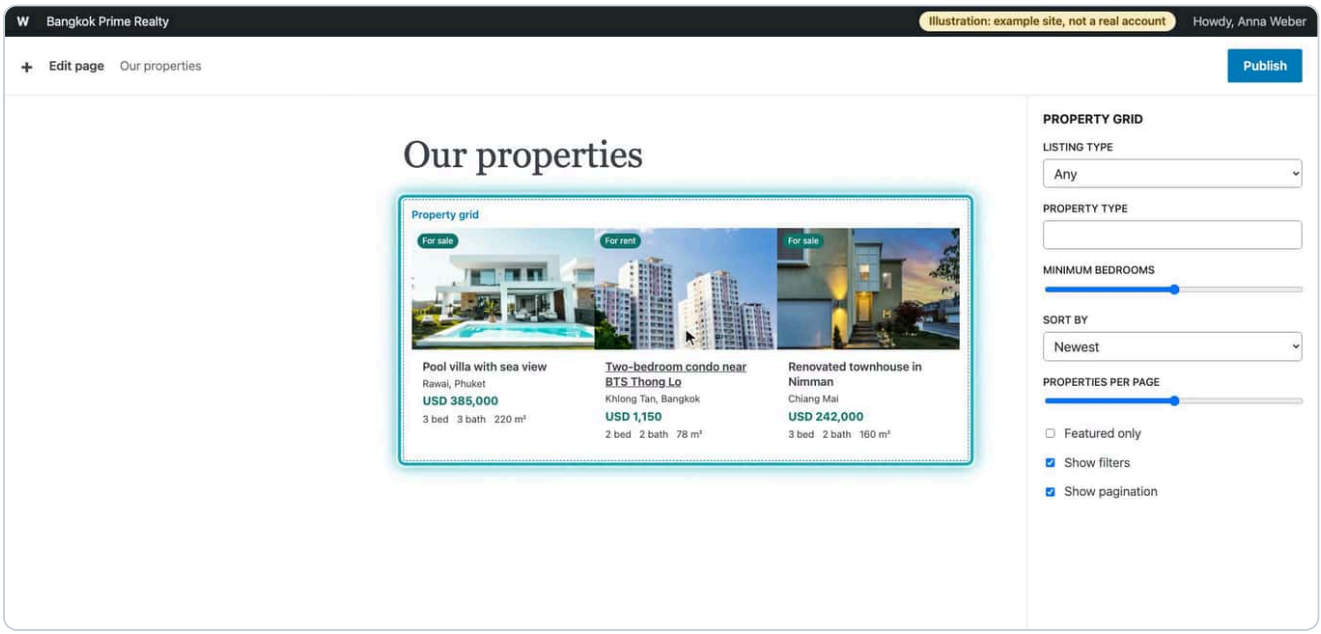


Figure 170.10 · Screen recorded 4 November 2026

11 The grid appears **right in the editor**.

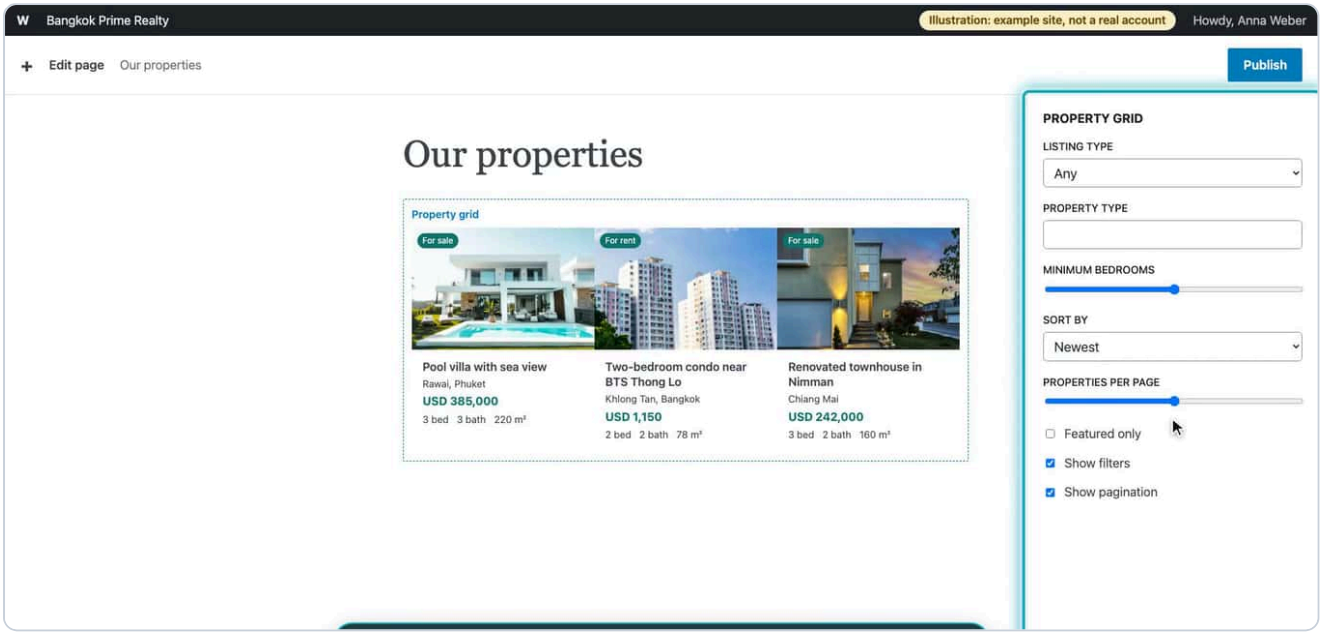


Figure 170.11 · Screen recorded 4 November 2026

12 On the right: listing type, bedrooms, sort order and how many per page.

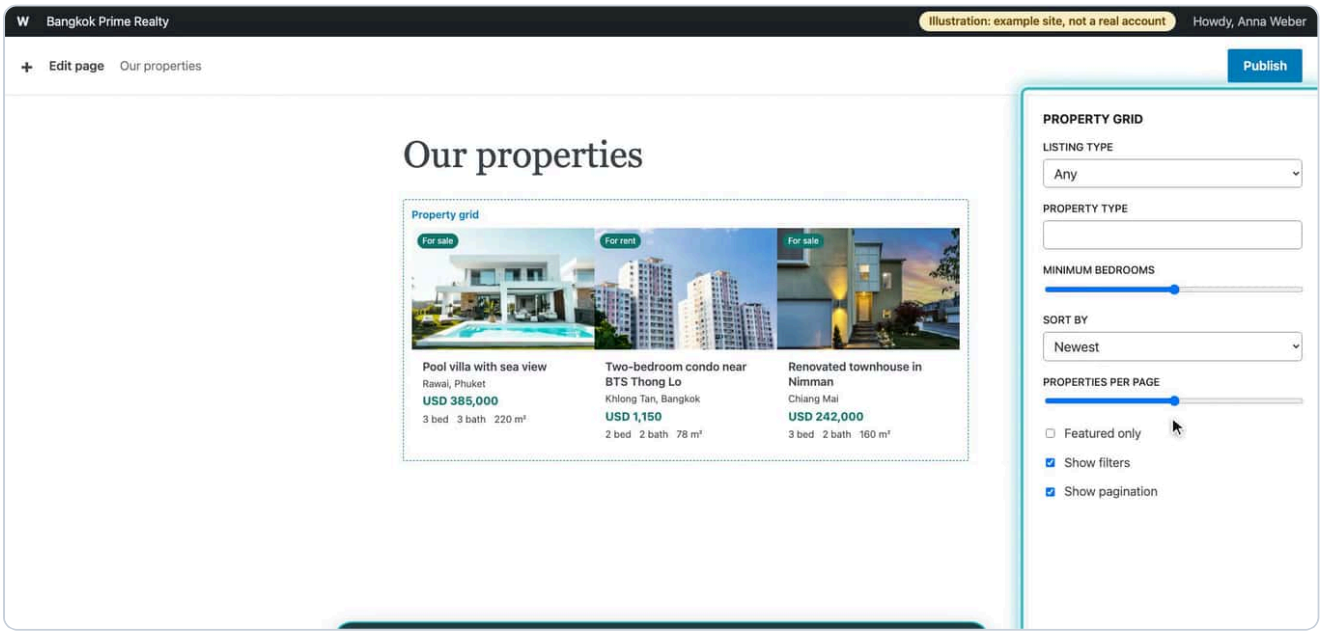


Figure 170.12 · Screen recorded 4 November 2026

13 Publish the page, and it shows your **live properties**.

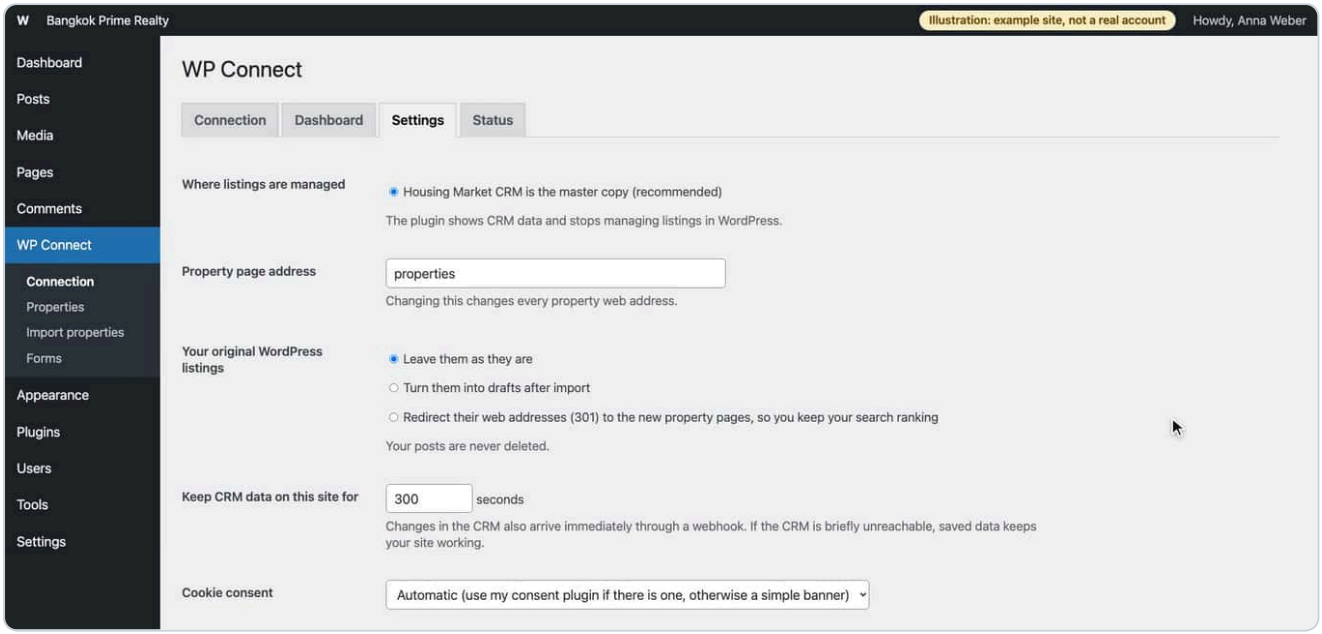


Figure 170.13 · Screen recorded 4 November 2026

14 In **WP Connect**, **Settings**, you decide how it works.

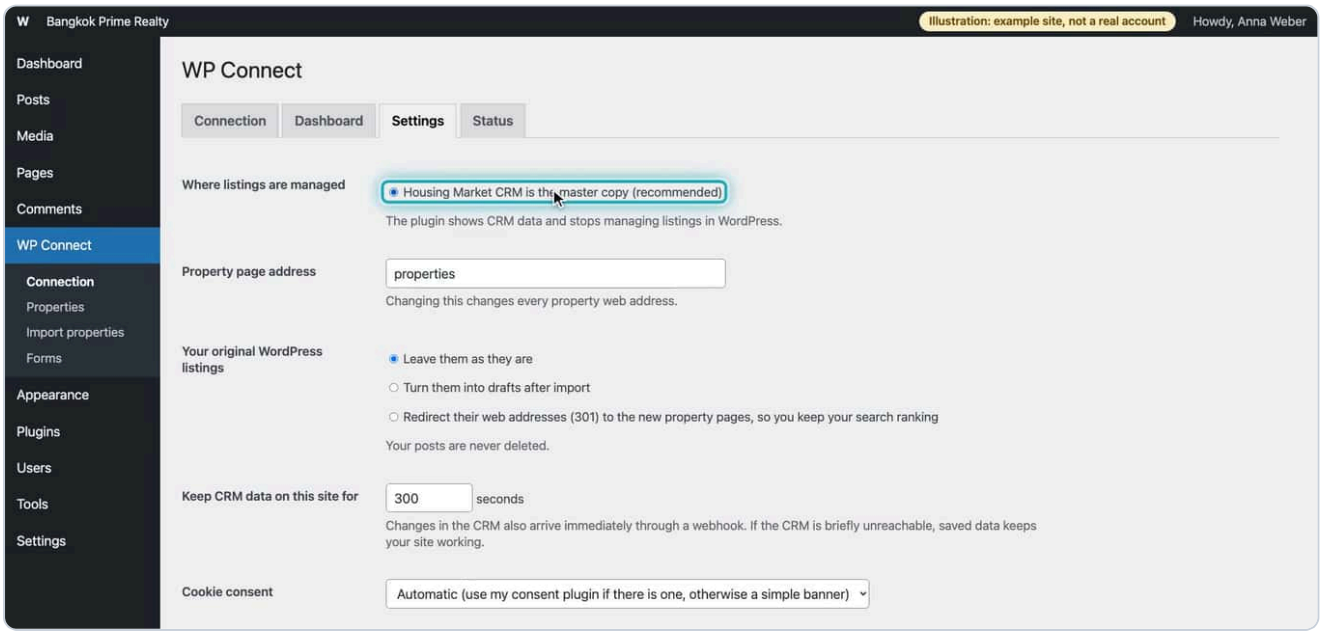


Figure 170.14 · Screen recorded 4 November 2026

15 The CRM stays the **master copy**.

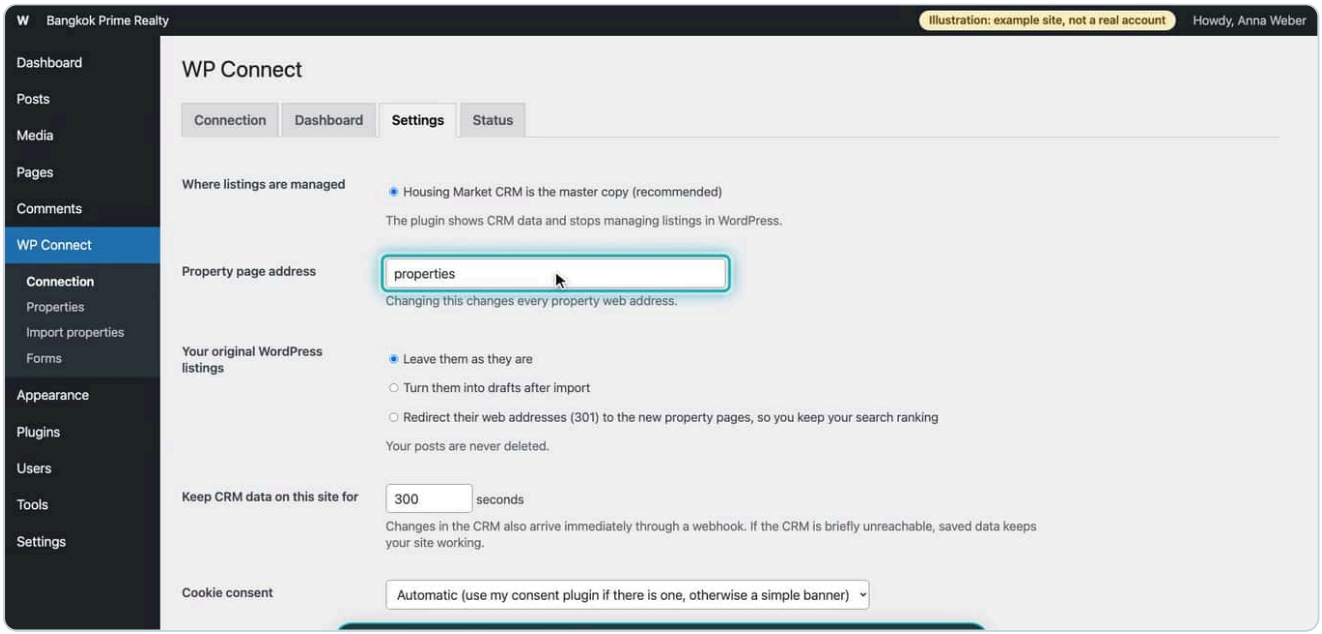


Figure 170.15 · Screen recorded 4 November 2026

16 The **property page address**. Changing it changes every property web address.

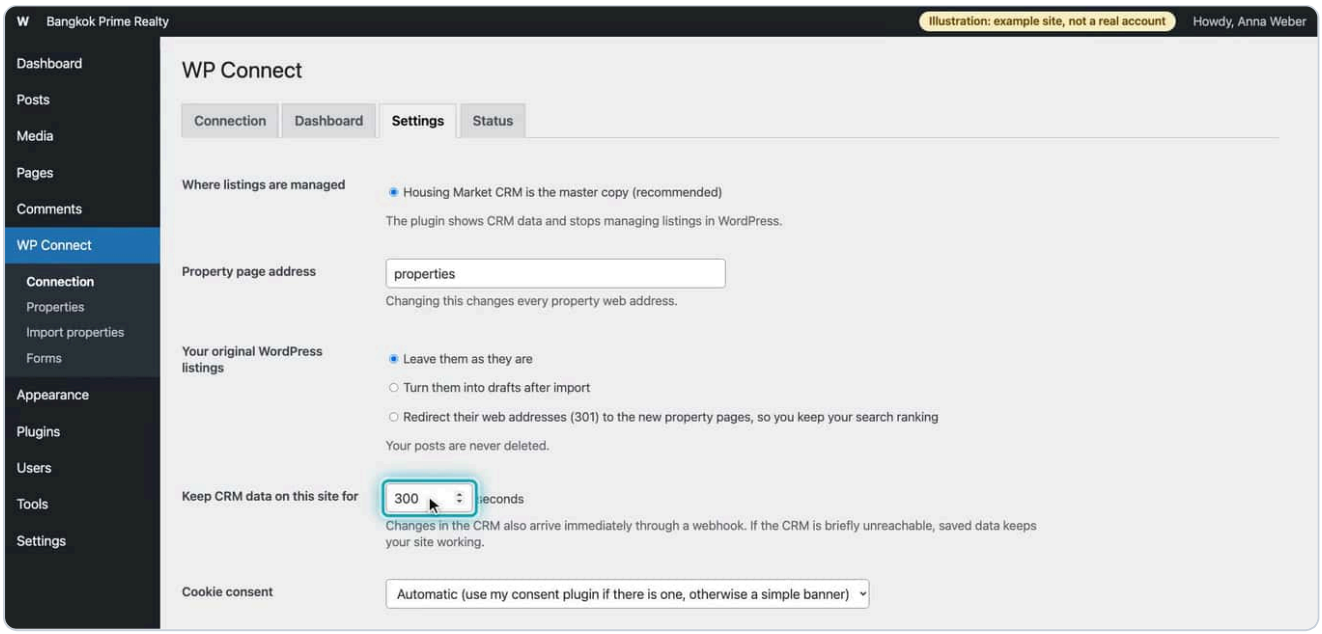


Figure 170.16 · Screen recorded 4 November 2026

17 A copy is kept for this many seconds, **300** by default.

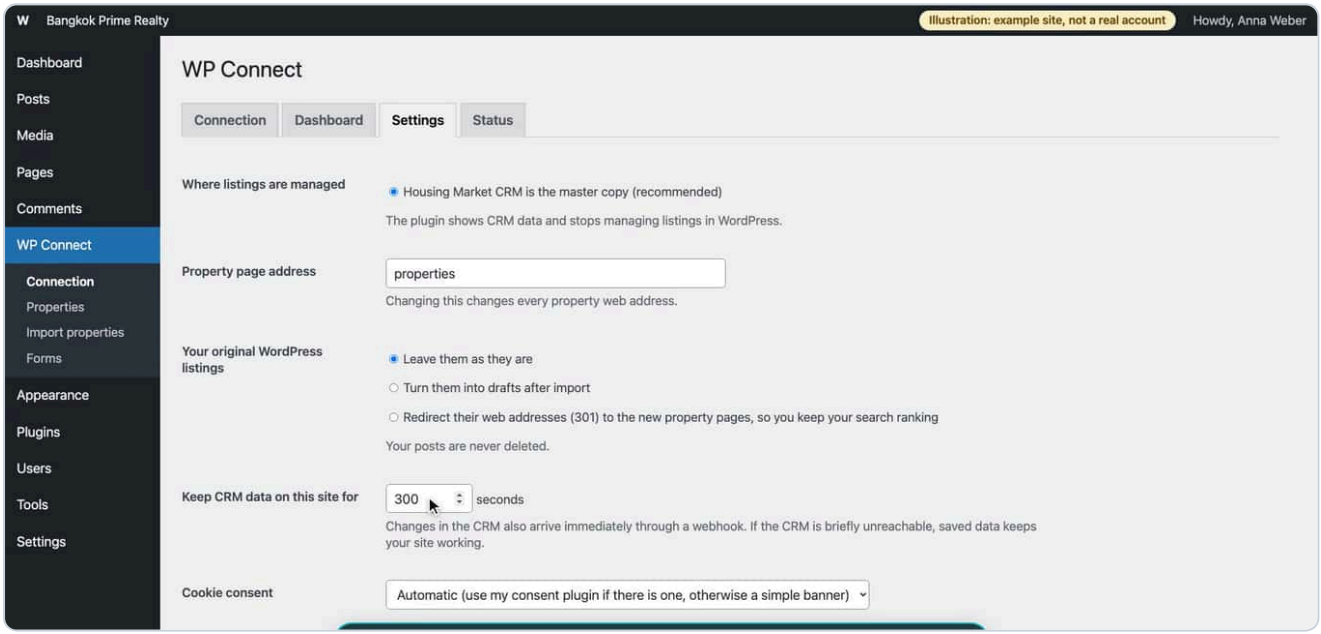


Figure 170.17 · Screen recorded 4 November 2026

18 If the CRM is briefly unreachable, **your site keeps working** from the saved copy.



Figure 170.18 · Screen recorded 4 November 2026

RELATED HELP CENTER ARTICLES

Can I manage my property listings? faq.housingmarketgroup.com/faq/can-i-manage-my-property-listings

171 CHAPTER 171

WordPress enquiries, consent and the pixel

All plans | For agents who want their properties on their own website | Watch the video

OVERVIEW

The plugin’s own enquiry form, and the form plugins you switch on, send each enquiry to the CRM as a lead linked to the property, with the source “WordPress plugin”.

Every enquiry becomes a lead in your CRM, linked to the property, with the source “WordPress plugin” and the address of your website. This works with the plugin’s built-in enquiry form, and with Contact Form 7, WPForms, Gravity Forms and Elementor Forms once you switch each one on under Housing Market CRM Connect, then Forms.

If the CRM cannot be reached at that moment, the enquiry is queued and sent again, so it is not lost. Spam protection includes a hidden field, a minimum time to fill in the form and a rate limit, and you can add Turnstile or reCAPTCHA in Settings.

To follow up, open Leads in the CRM.

From the Help Center: **How do WordPress enquiries reach my CRM?**

STEP BY STEP

1 A visitor opens a **property page** on your WordPress website.

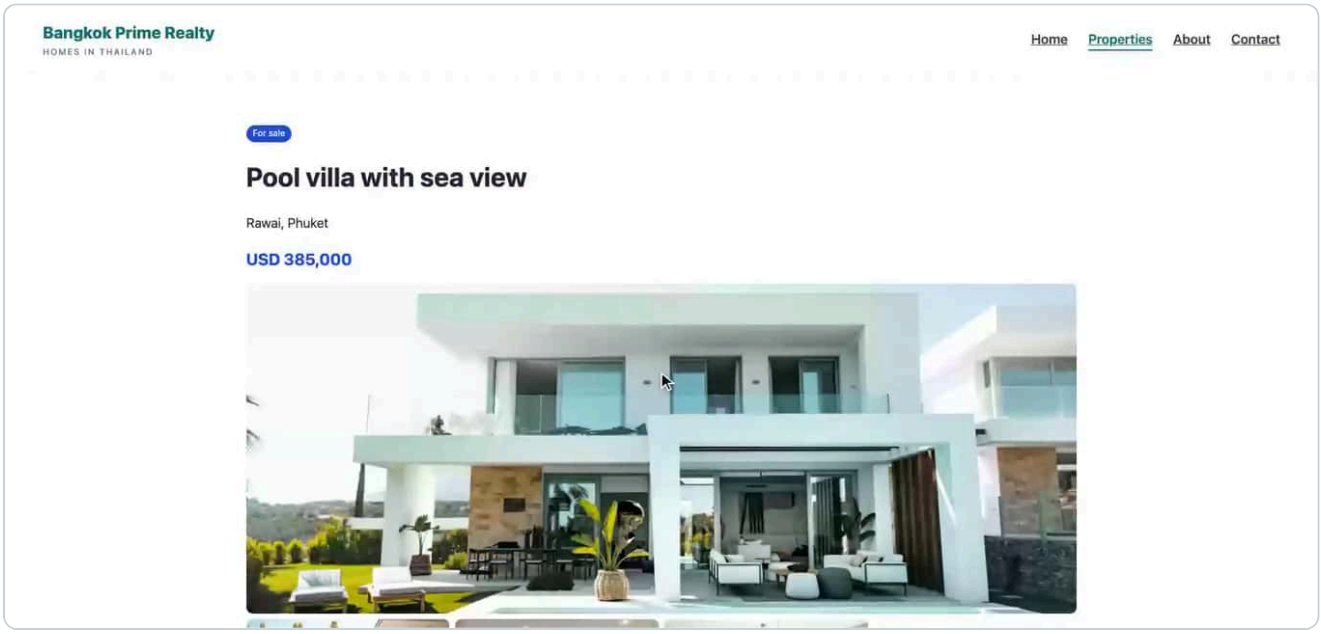


Figure 171.1 · Screen recorded 4 November 2026

2 Under the property is the **enquiry form**.

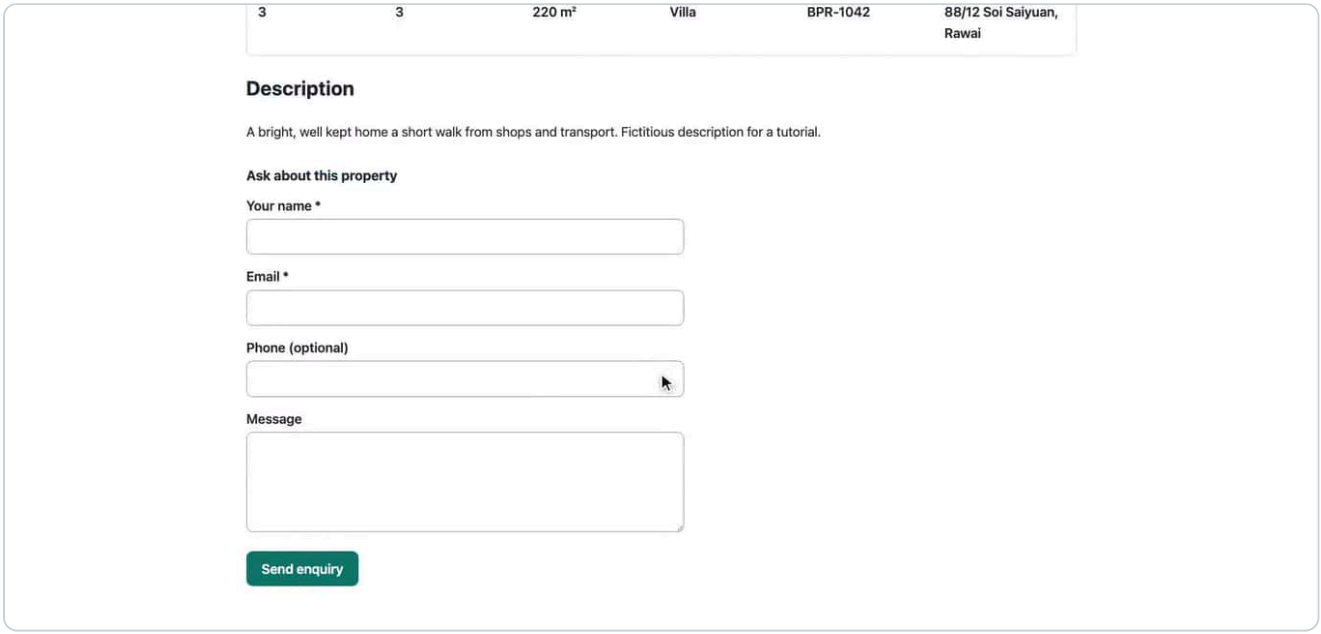


Figure 171.2 · Screen recorded 4 November 2026

3 They fill in their **name** their **email**.

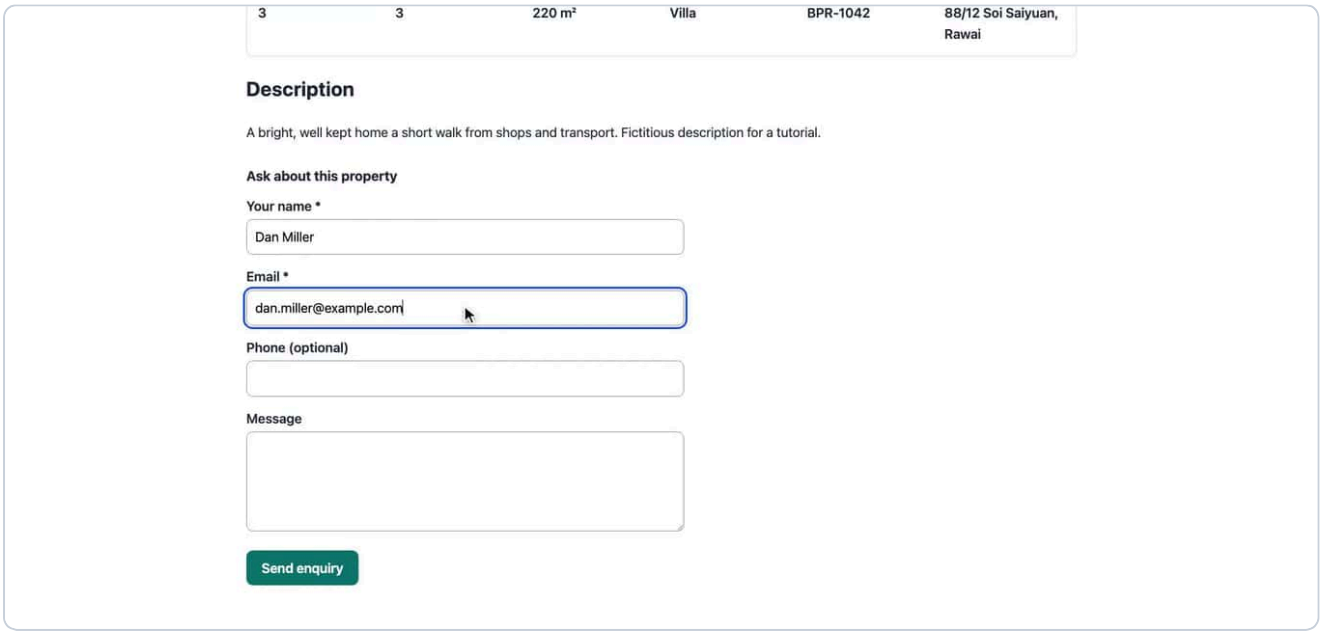


Figure 171.3 · Screen recorded 4 November 2026

4 their **phone**, if they want and a **message**.

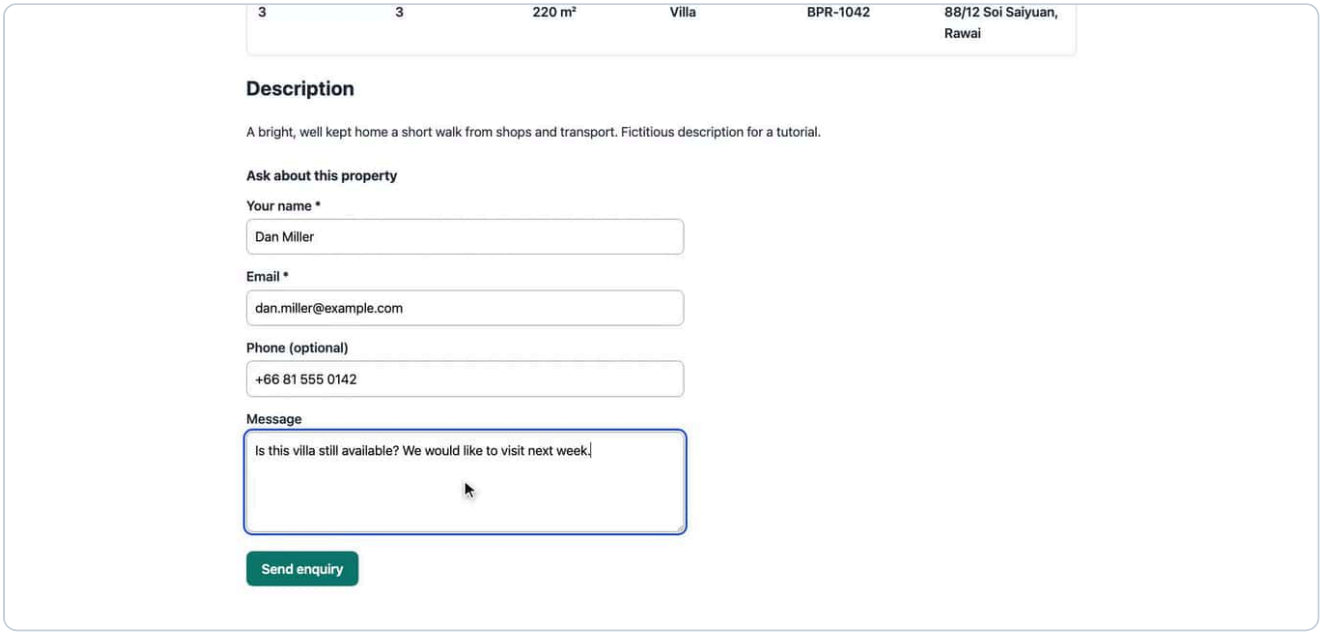


Figure 171.4 · Screen recorded 4 November 2026

5 They click **Send enquiry**.

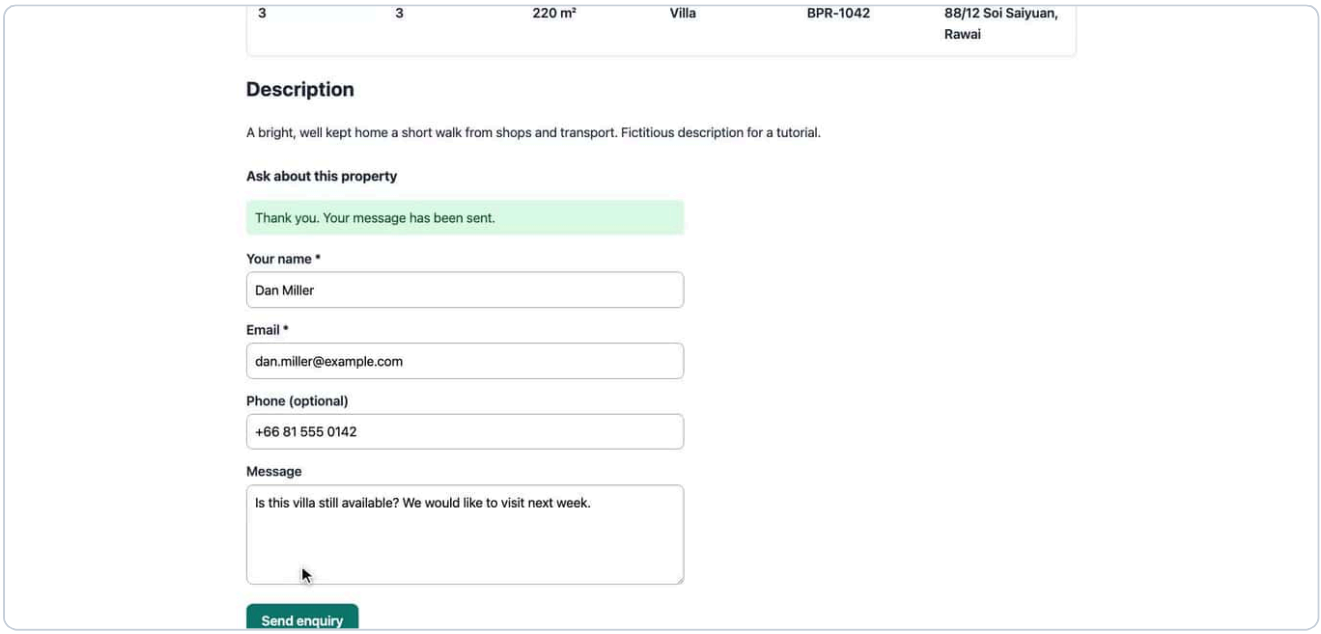


Figure 171.5 · Screen recorded 4 November 2026

6 The visitor sees a **thank you**. The enquiry is already on its way to your CRM.

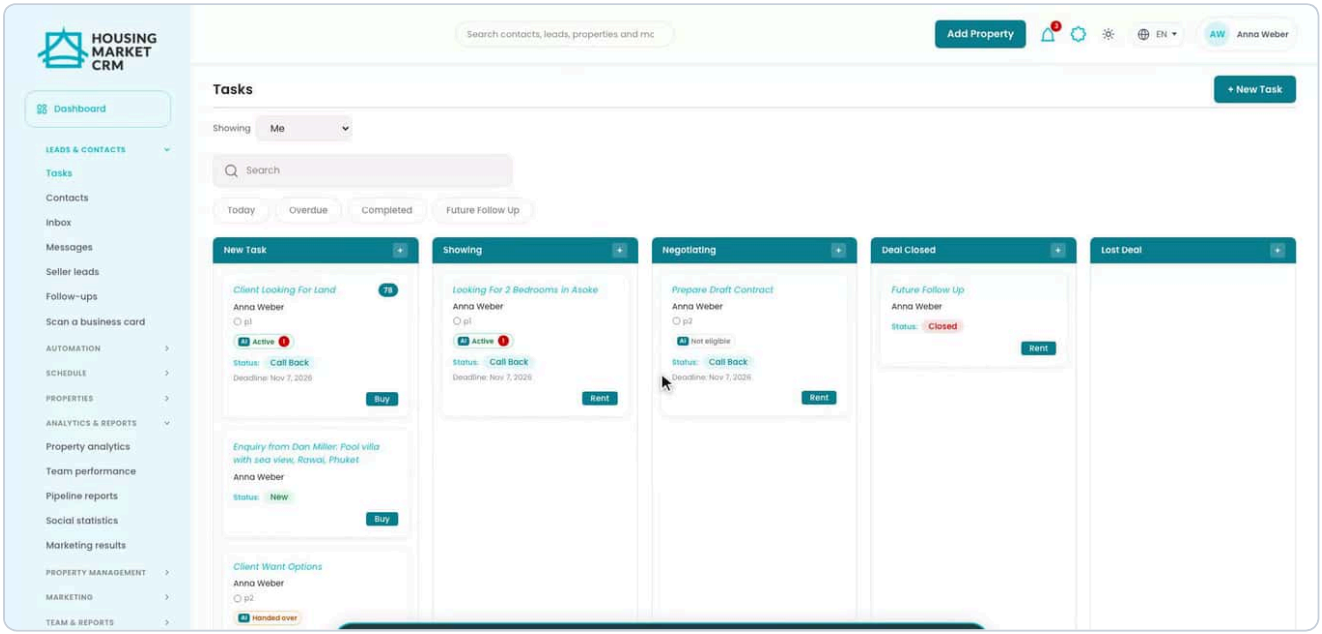


Figure 171.6 · Screen recorded 4 November 2026

7 In your CRM, open **Tasks**, your lead board.

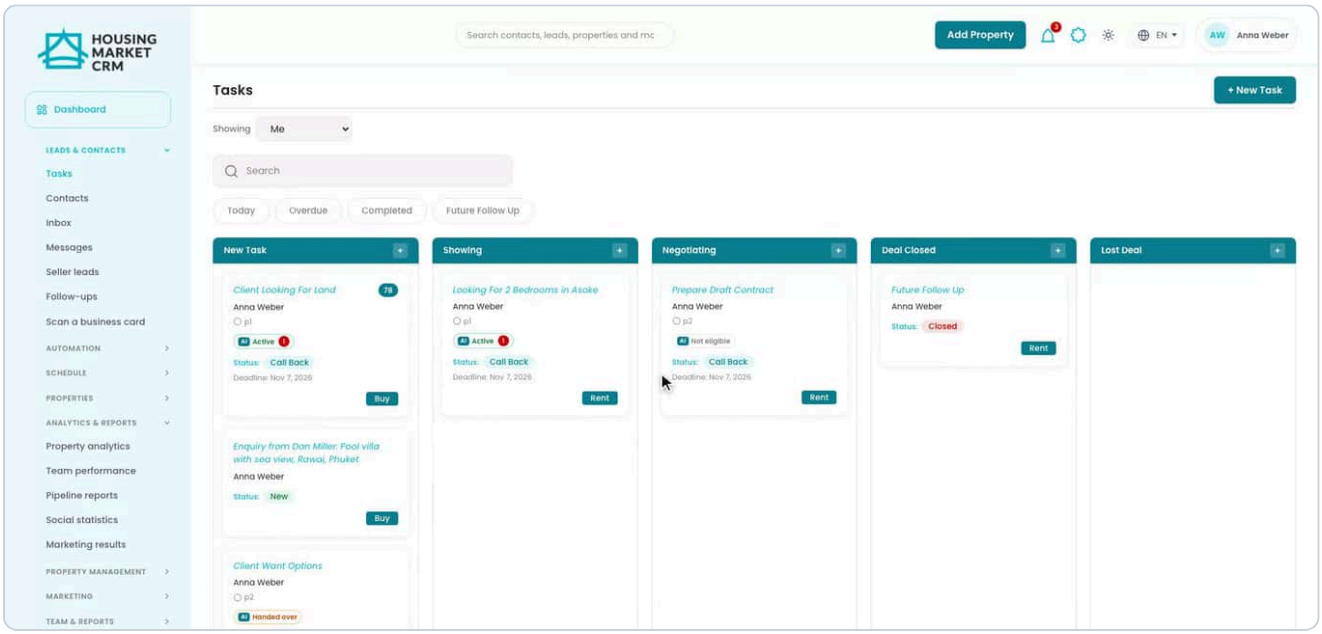


Figure 171.7 · Screen recorded 4 November 2026

8 The enquiry is there as a **new lead**, linked to the property.

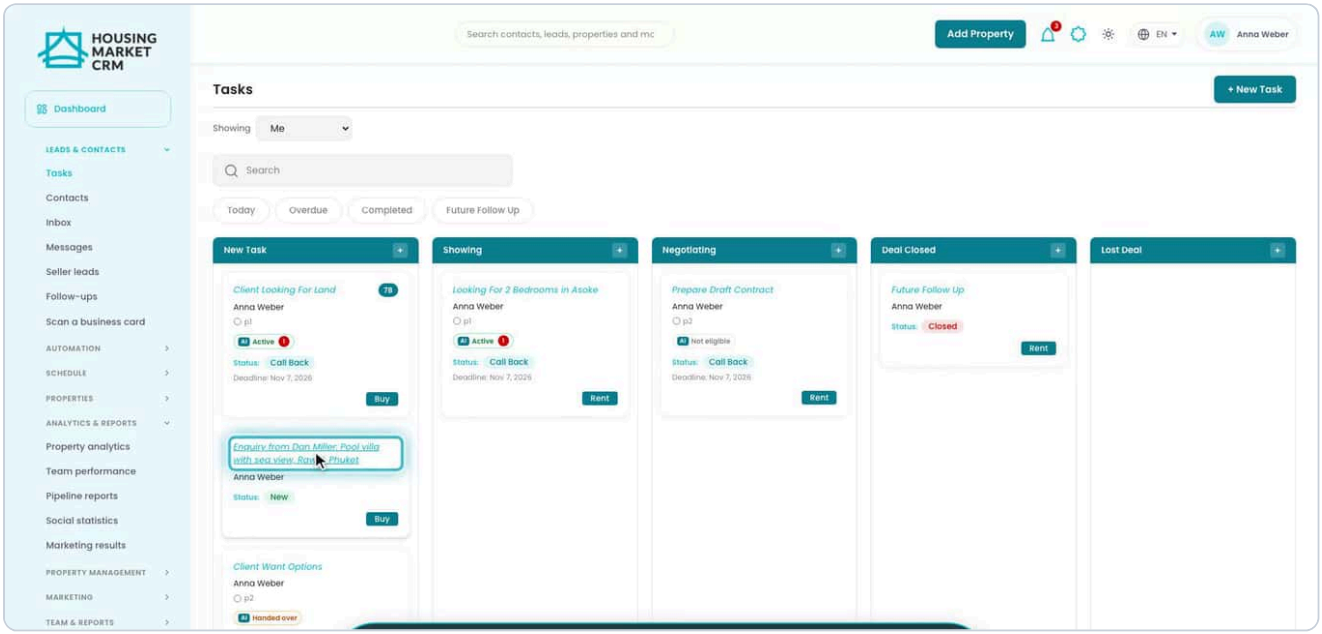


Figure 171.8 · Screen recorded 4 November 2026

9 Open it.

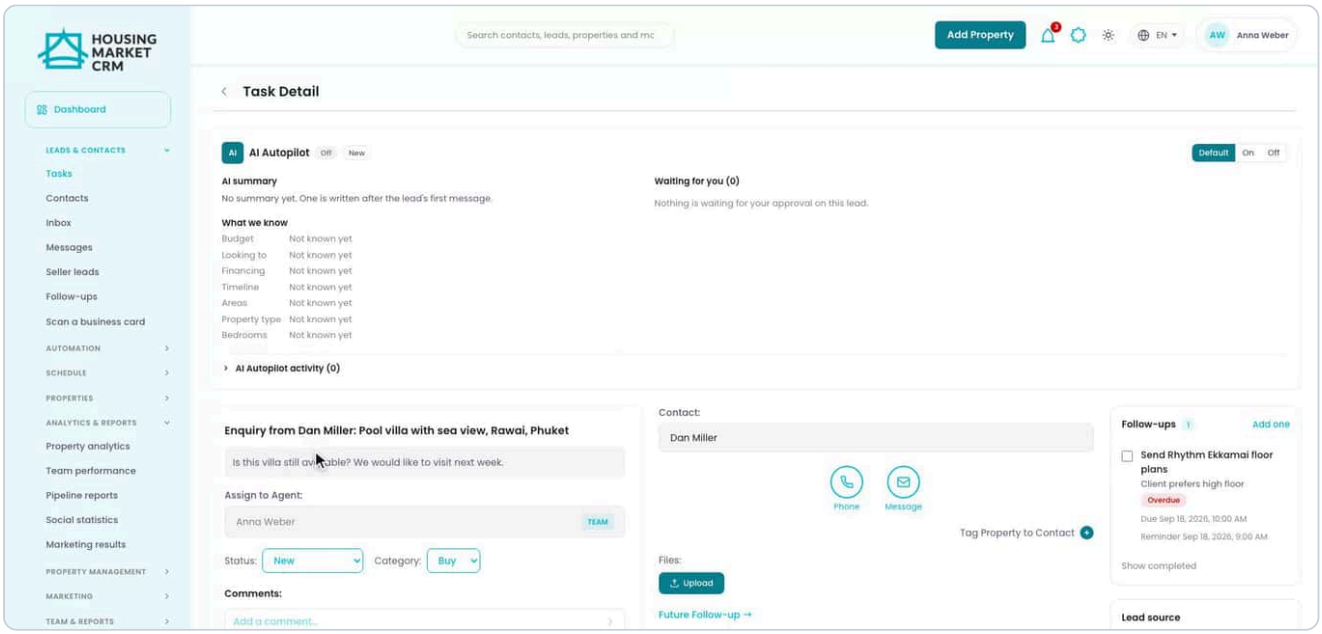


Figure 171.9 · Screen recorded 4 November 2026

10 The visitor's **message** and the activity shows it came from the **WordPress plugin**, and from which page.

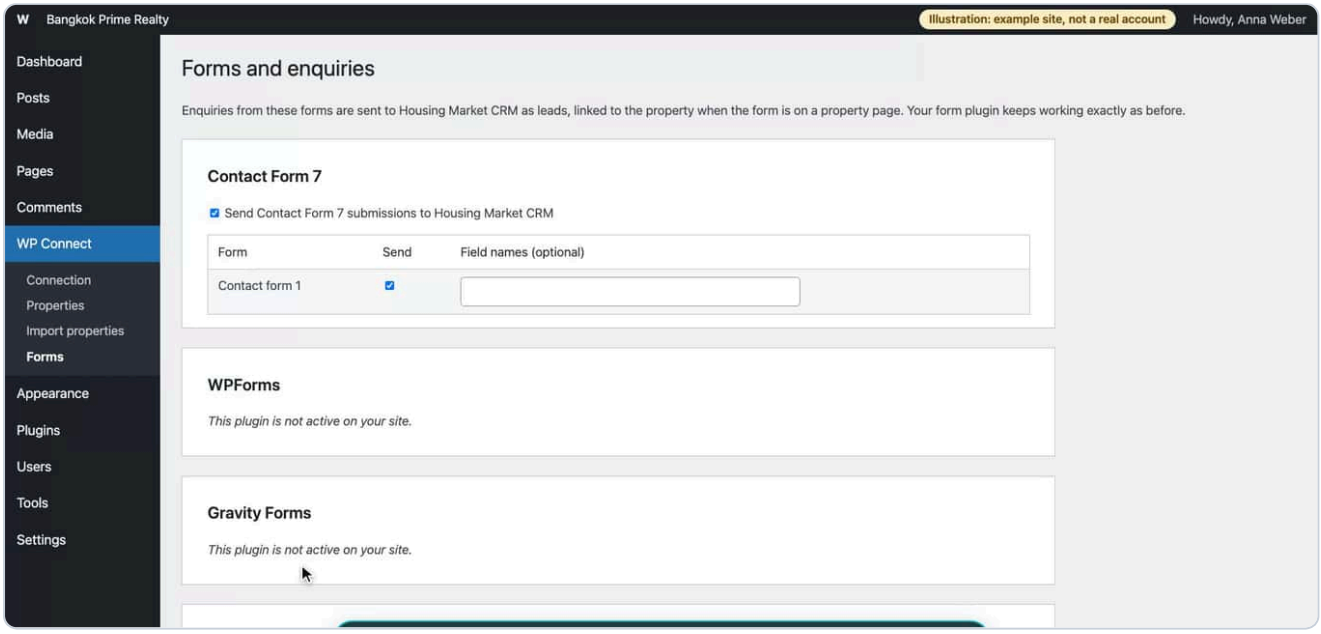


Figure 171.10 · Screen recorded 4 November 2026

11 Back in WordPress, **WP Connect**, **Forms**.

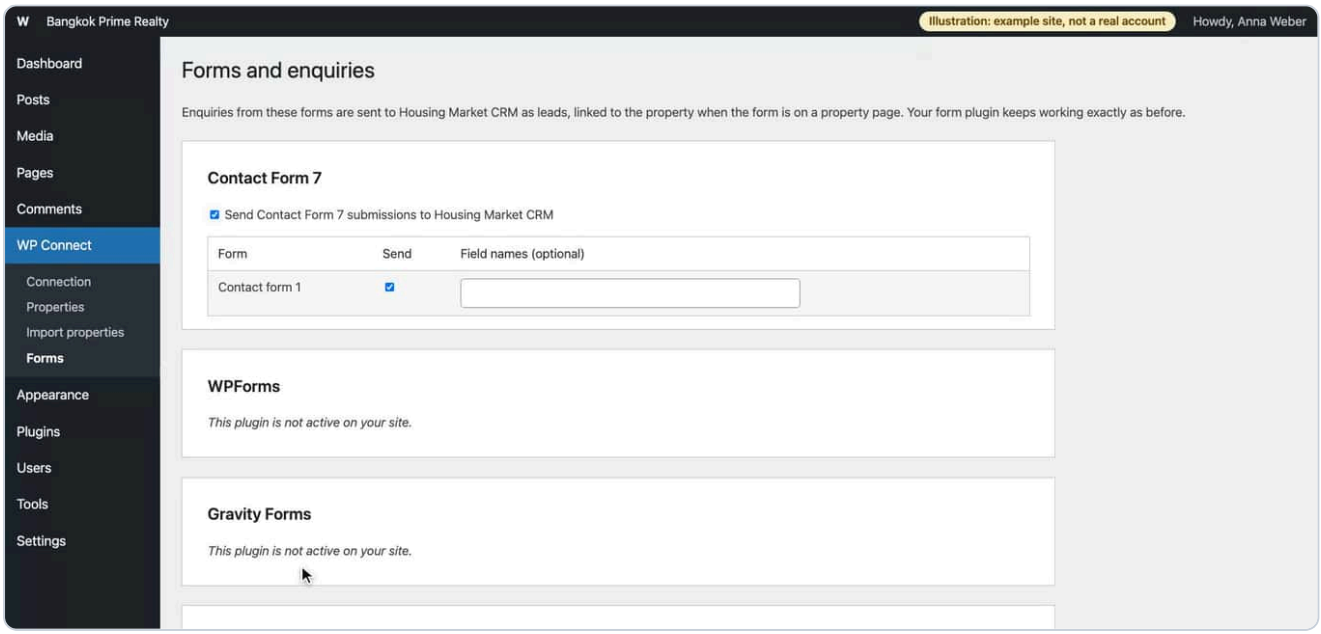


Figure 171.11 · Screen recorded 4 November 2026

12 Tick **Contact Form 7** and its enquiries become CRM leads too.

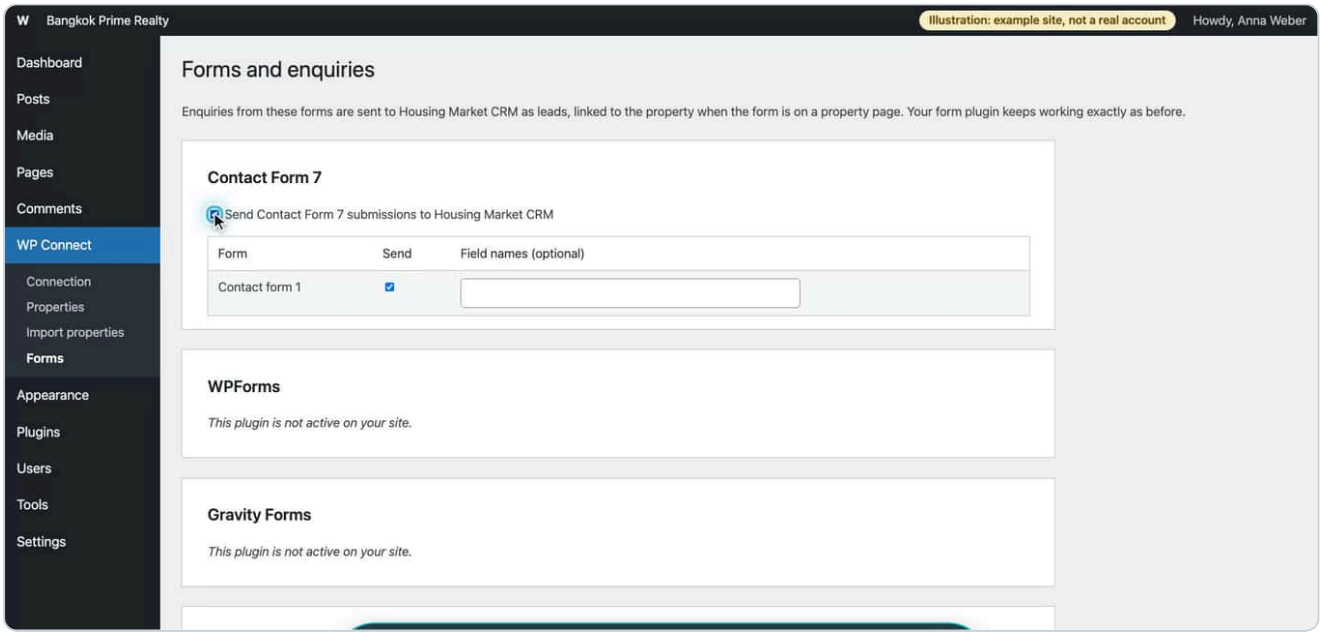


Figure 171.12 · Screen recorded 4 November 2026

13 WPForms, Gravity Forms and Elementor Forms work the same way when they are active.

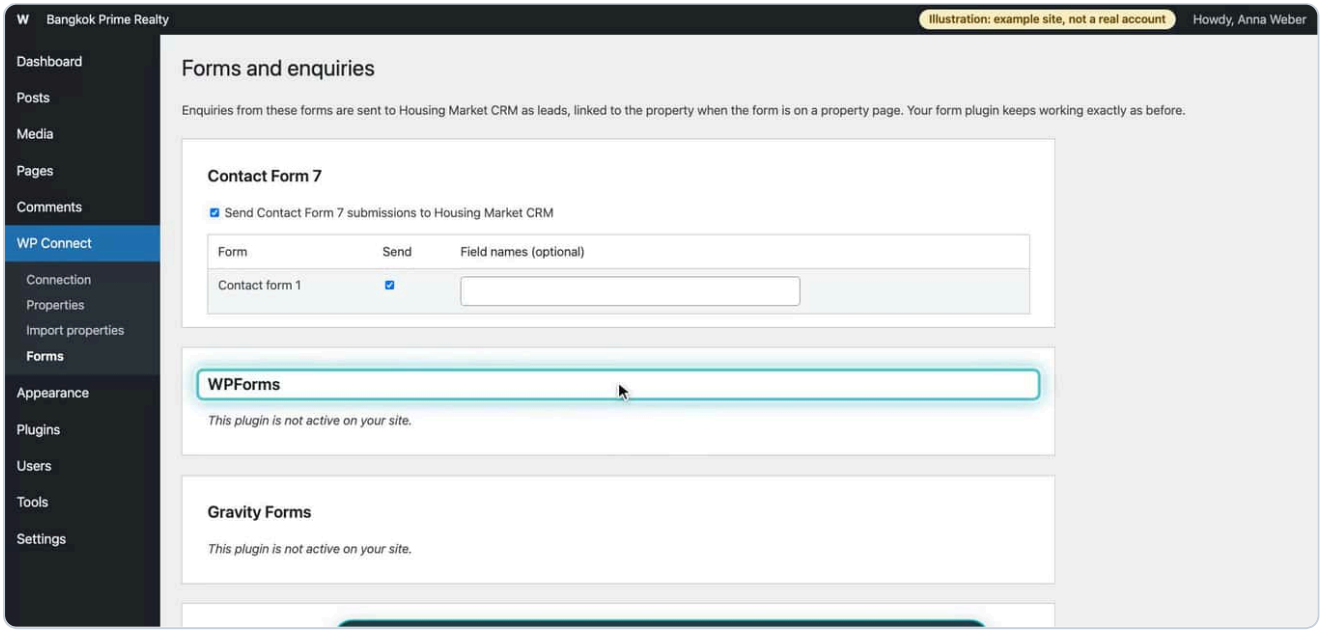


Figure 171.13 · Screen recorded 4 November 2026

14 Your form plugin keeps working **exactly as before**.

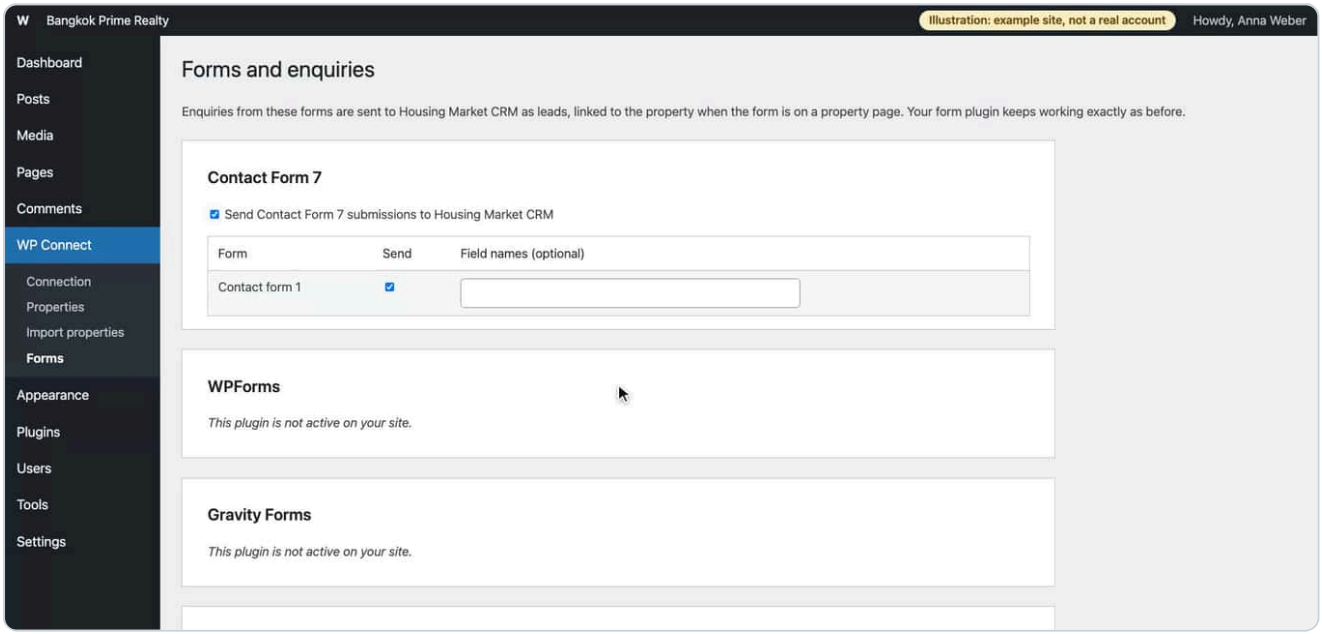


Figure 171.14 · Screen recorded 4 November 2026

15 **Enquiry delivery** shows what is waiting and what could not be delivered.

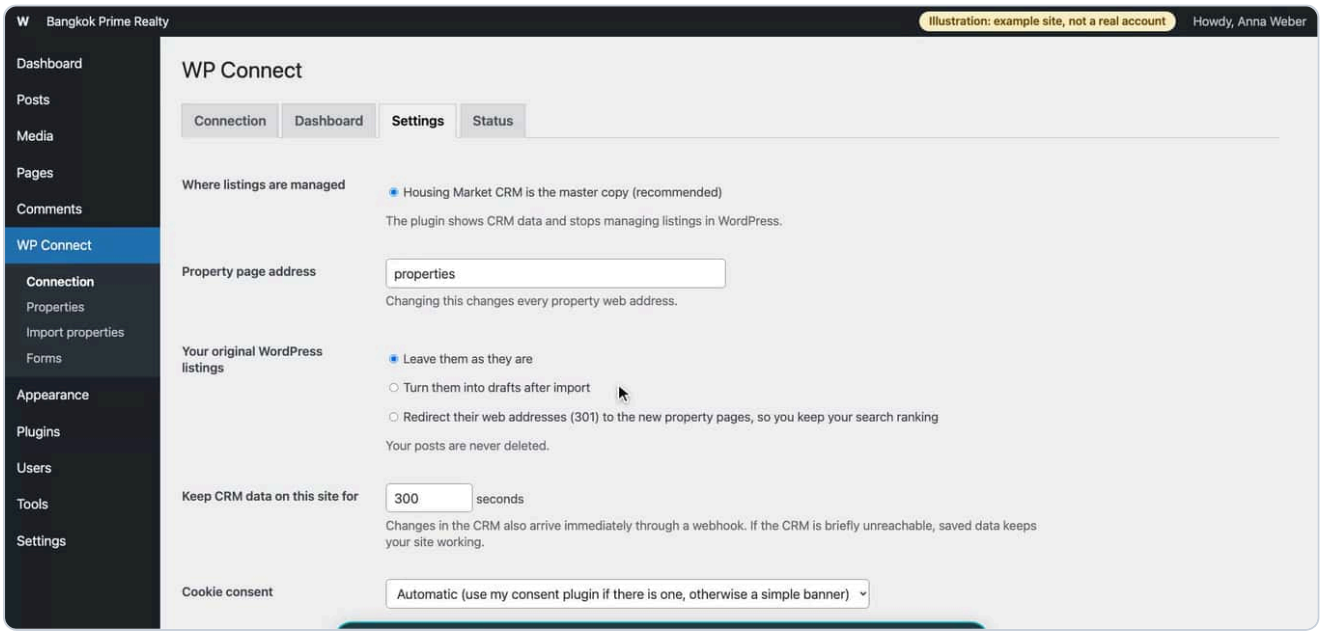


Figure 171.15 · Screen recorded 4 November 2026

16 In **Settings**, you choose how **cookie consent** and **spam protection** work.

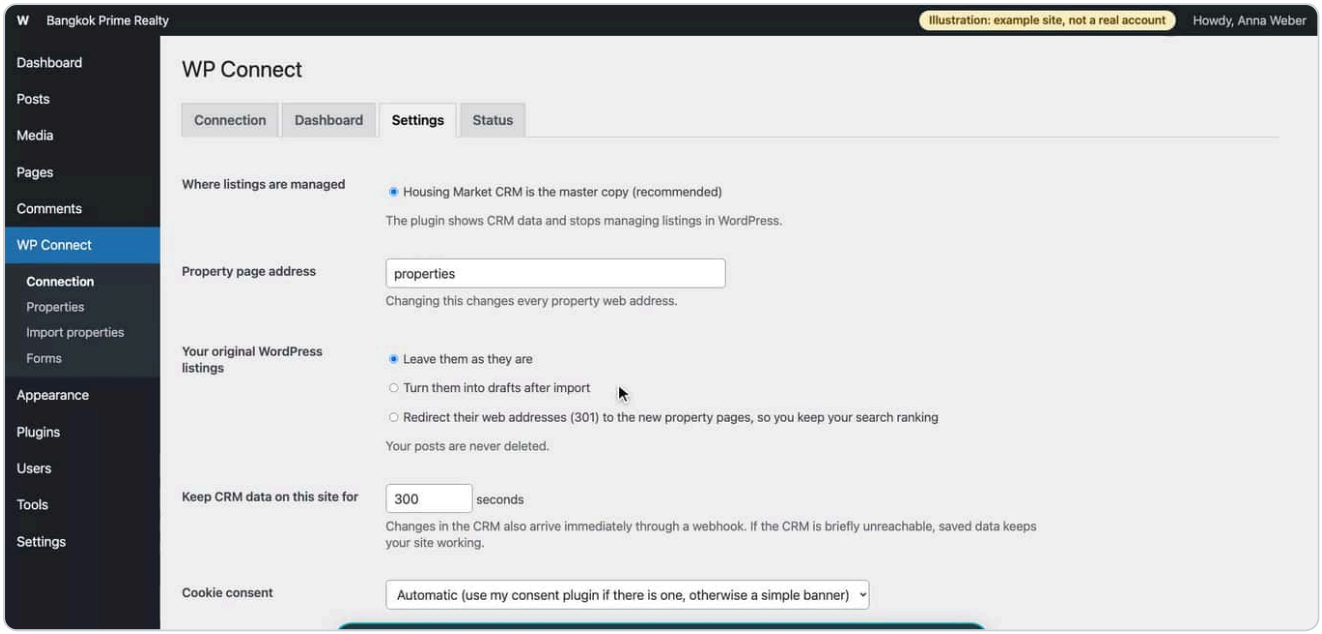


Figure 171.16 · Screen recorded 4 November 2026

17 **Cookie consent** can follow your own consent plugin, or use a simple built-in banner.

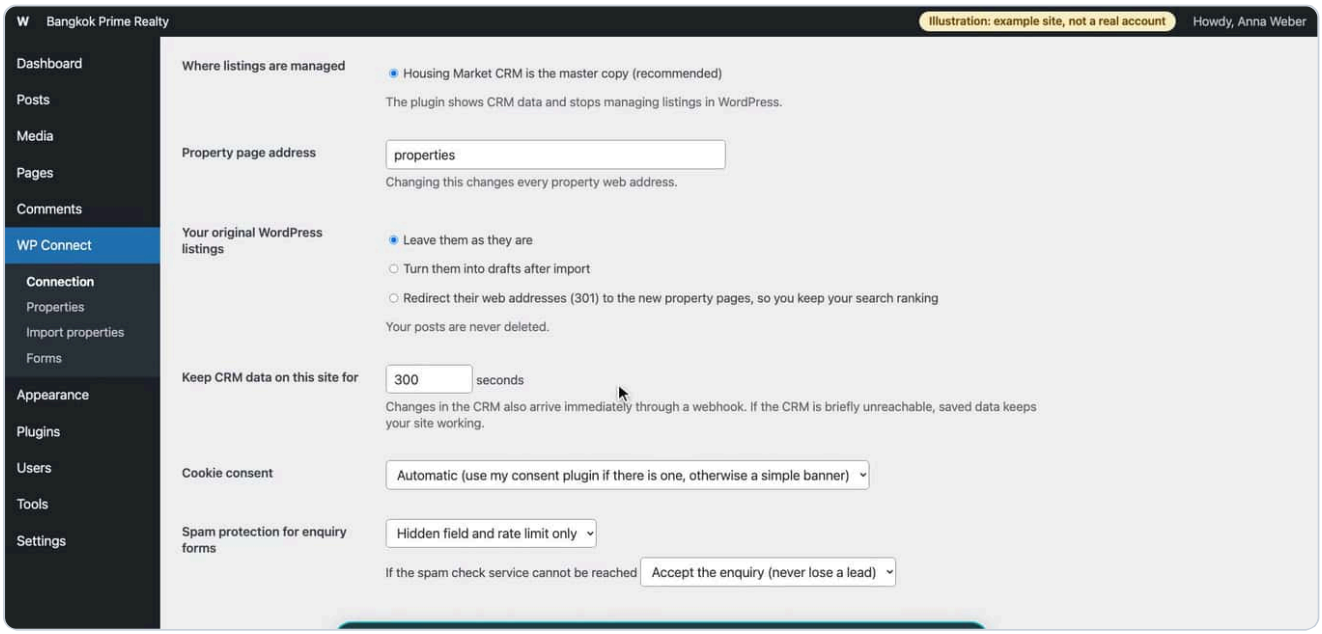


Figure 171.17 · Screen recorded 4 November 2026

18 **Spam protection**: a hidden field and rate limit, Cloudflare Turnstile or Google reCAPTCHA.

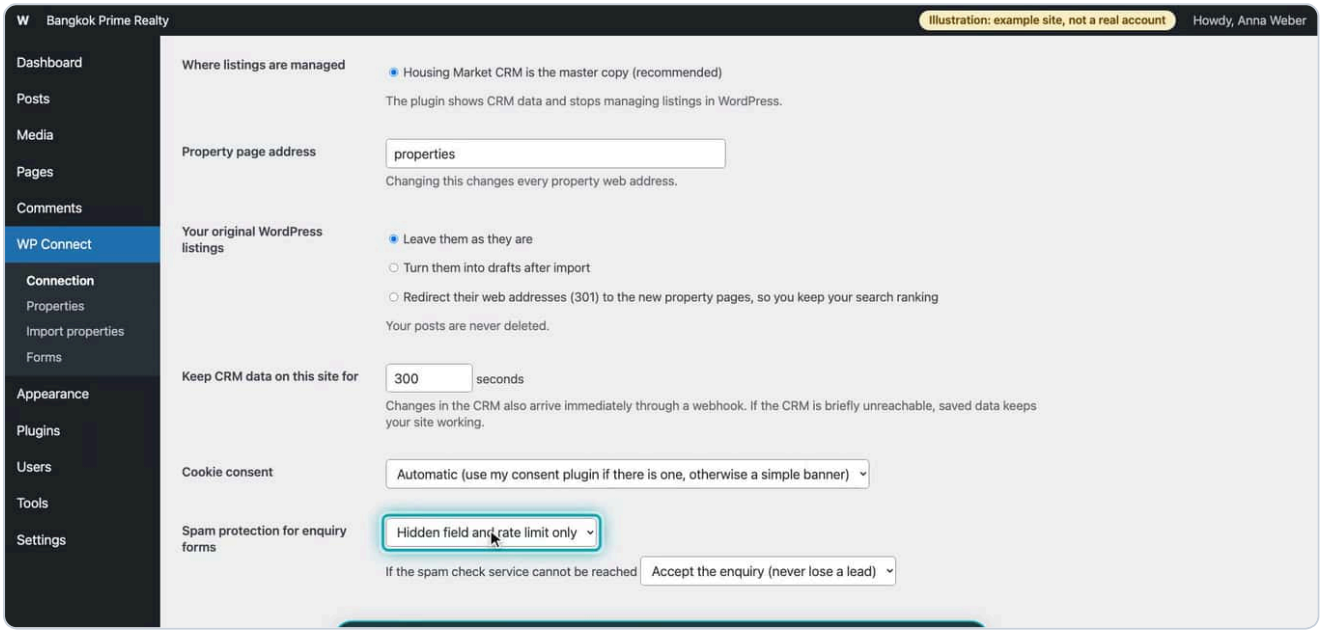


Figure 171.18 · Screen recorded 4 November 2026

19 If the spam check cannot be reached, you decide: **never lose a lead**, or refuse.

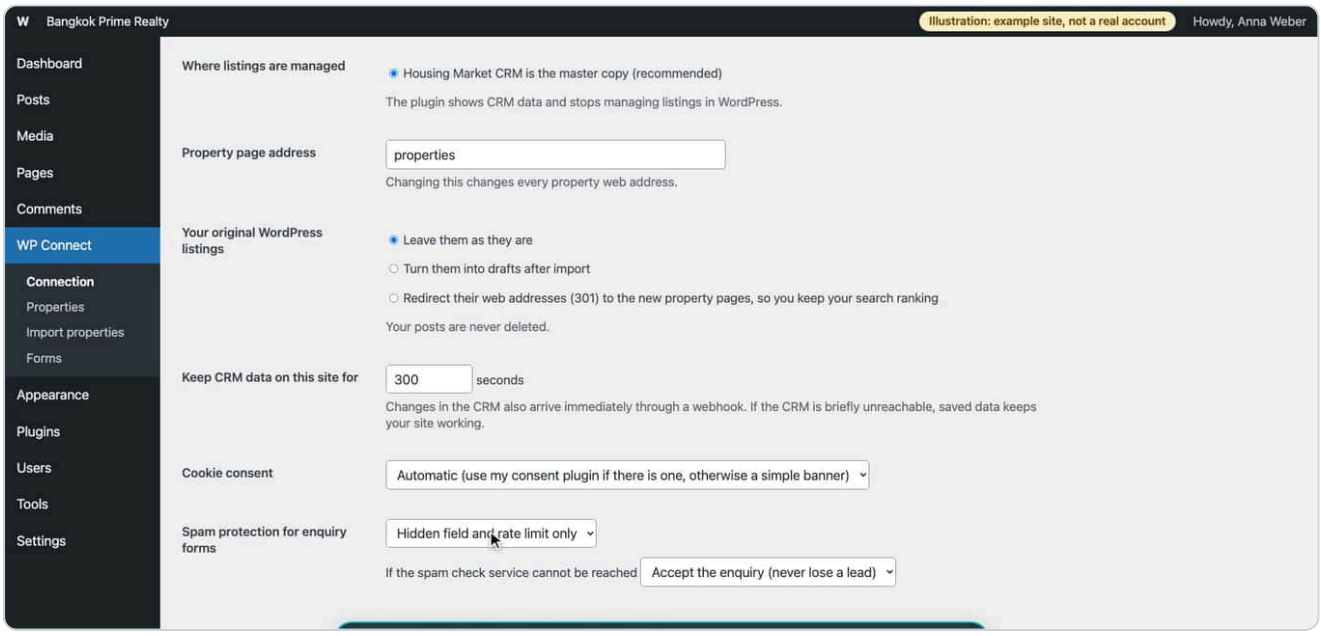


Figure 171.19 · Screen recorded 4 November 2026

20 Show the enquiry form under **every property**, or turn it off.

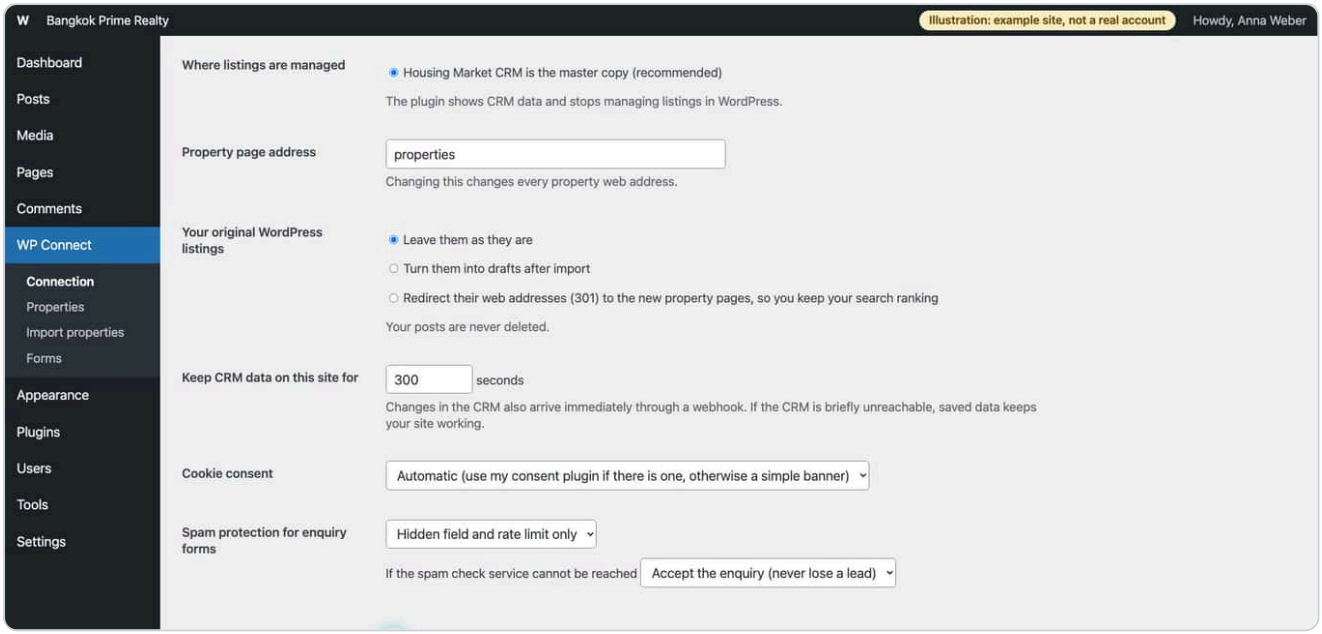


Figure 171.20 · Screen recorded 4 November 2026

21 The visitor retargeting pixel is **currently updating**, so it is not covered here.

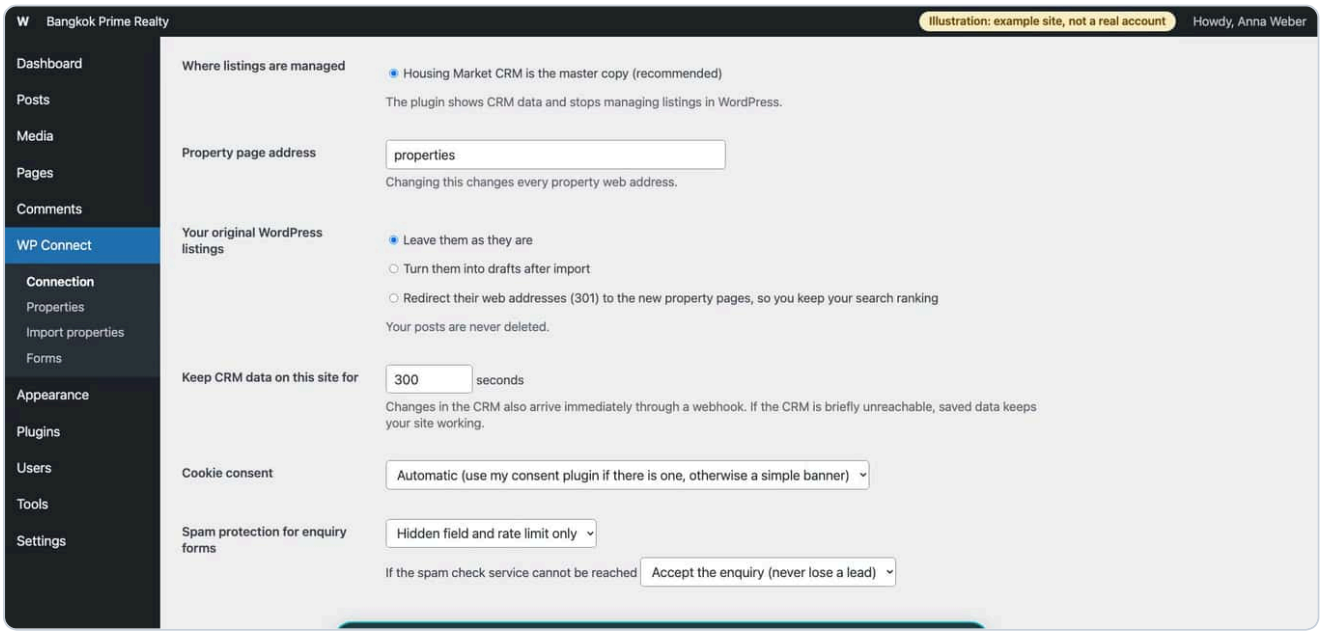


Figure 171.21 · Screen recorded 4 November 2026

RELATED HELP CENTER ARTICLES

How do lead forms for my website work?	faq.housingmarketgroup.com/faq/how-do-lead-forms-for-my-website-work

PART 15

Integrations

172 Advertise with Housing Market Ads

173 API keys and webhooks

174 Send CRM contacts to Ads as an audience

175 Receive DDproperty leads

176 Promote a listing with Ads in two clicks

172 CHAPTER 172

Advertise with Housing Market Ads

All plans | For agents | Watch the video

TODO The Help Center says to open Property analytics, choose a listing and choose Advertise in its Advertising panel; the video (2026-09-17) uses Ad campaigns in the left menu and Advertise a listing. Add the Ad campaigns route to the article if both exist.

TODO Plan: the Help Center says "Creating campaigns and audiences is part of Pro"; the video catalogue lists this task for all plans, so the chapter prints "All plans". Confirm the plan.

OVERVIEW

Yes. On Pro you can advertise a listing on Housing Market Ads and build Ads audiences from your own contacts without leaving the CRM, and Ads leads arrive in the inbox.

Advertising a listing

In the sidebar, open Property analytics, choose a listing, and choose Advertise in its Advertising panel. The CRM fills the campaign in from the listing, shows you the banners as they will look, suggests keywords from portal search data, and creates the campaign on your Housing Market Ads account, where it goes to our team for review before it runs. The listing then shows how its campaigns are performing. You need a Housing Market Ads account; budgets are in US dollars and Ads bills you for them as it always does — no money passes through the CRM.

If the CRM cannot create the campaign — for example because it cannot reach Housing Market Ads — the panel says so and offers Create the campaign in Housing Market Ads, which opens the Ads dashboard in a new tab so you can create it there.

Audiences

The CRM can send three kinds of audience to Housing Market Ads, built only from your own contacts: leads that have gone cold, past buyers, and people who enquired about a given property type. A contact is included only with positive consent on file and no unsubscribe, bounce or complaint against their address, and the CRM counts how many were left out and why.

Creating campaigns and audiences is part of Pro. Reading the figures of campaigns you already have, and pausing them, work on every plan, and an enquiry an Ads campaign produces reaches your inbox and lead board like any other.

From the Help Center: **Does the CRM work with Housing Market Ads?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

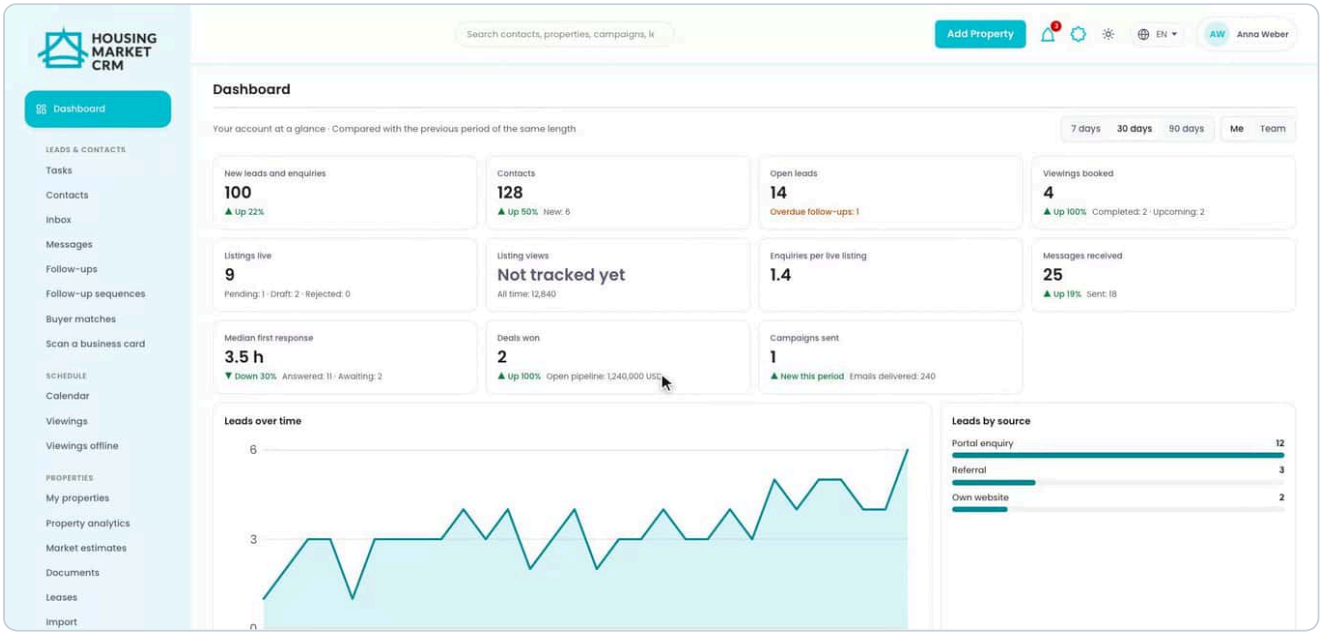


Figure 172.1 · Screen recorded 17 September 2026

2 Click **Ad campaigns** in the left menu.

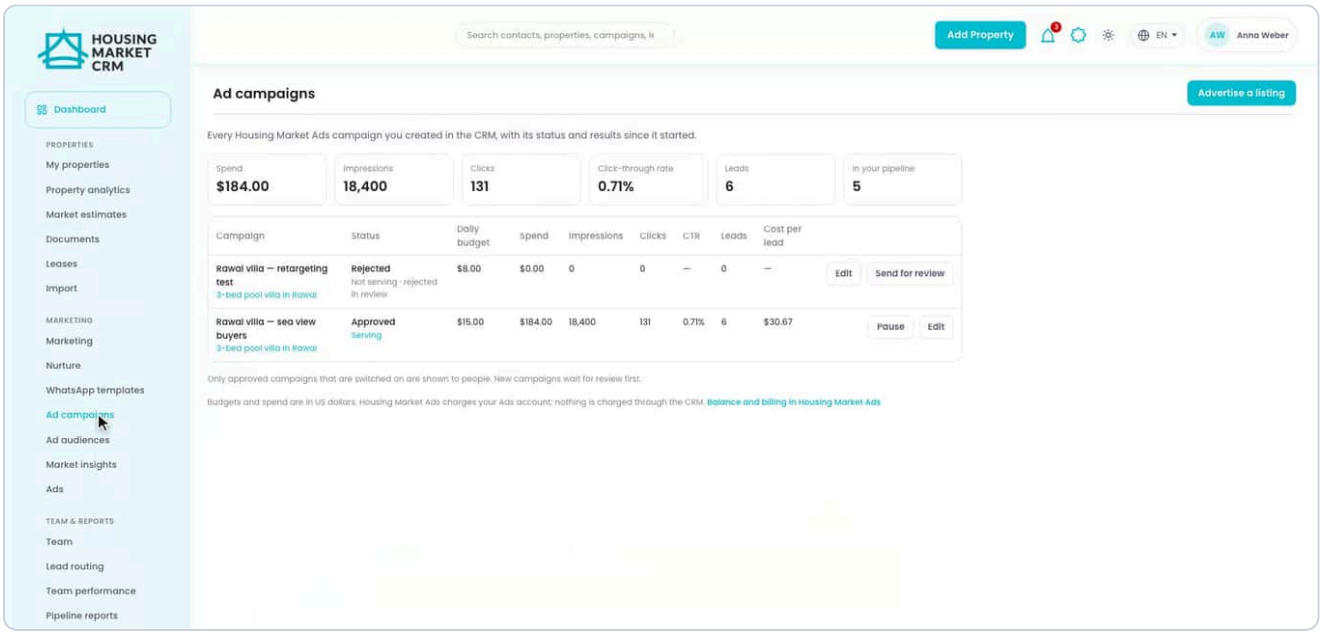


Figure 172.2 · Screen recorded 17 September 2026

3 See spend, impressions, clicks and leads at a glance.

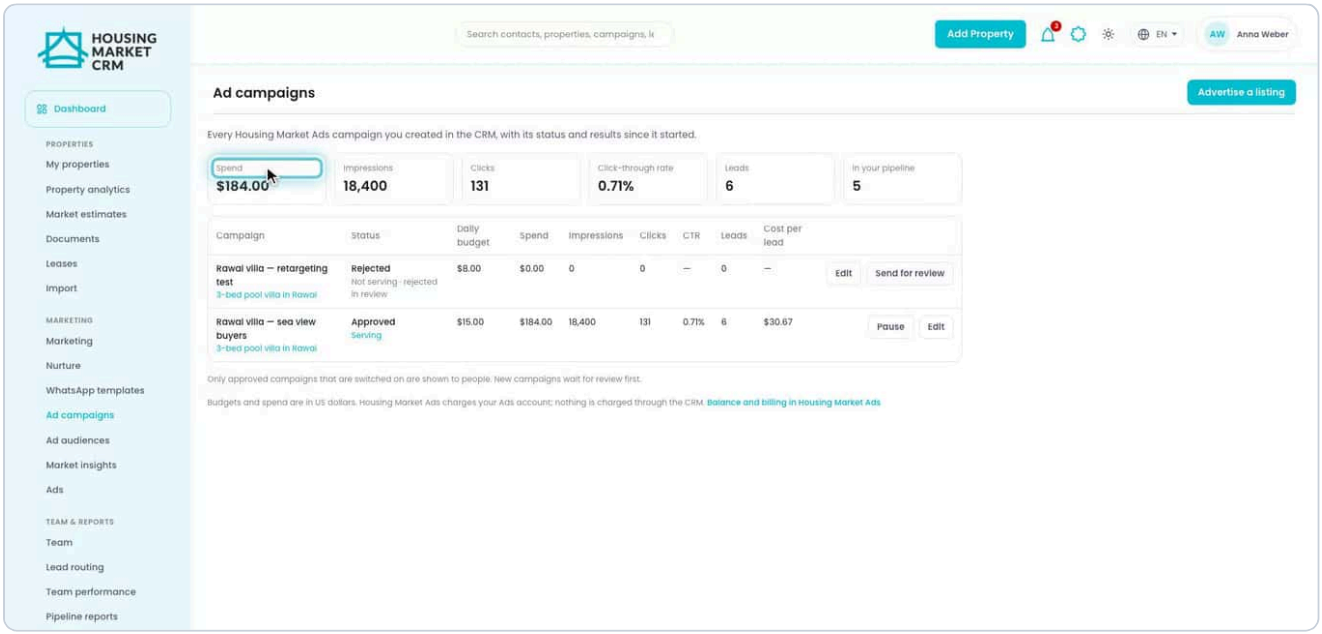


Figure 172.3 · Screen recorded 17 September 2026

4 Click **Advertise a listing**.

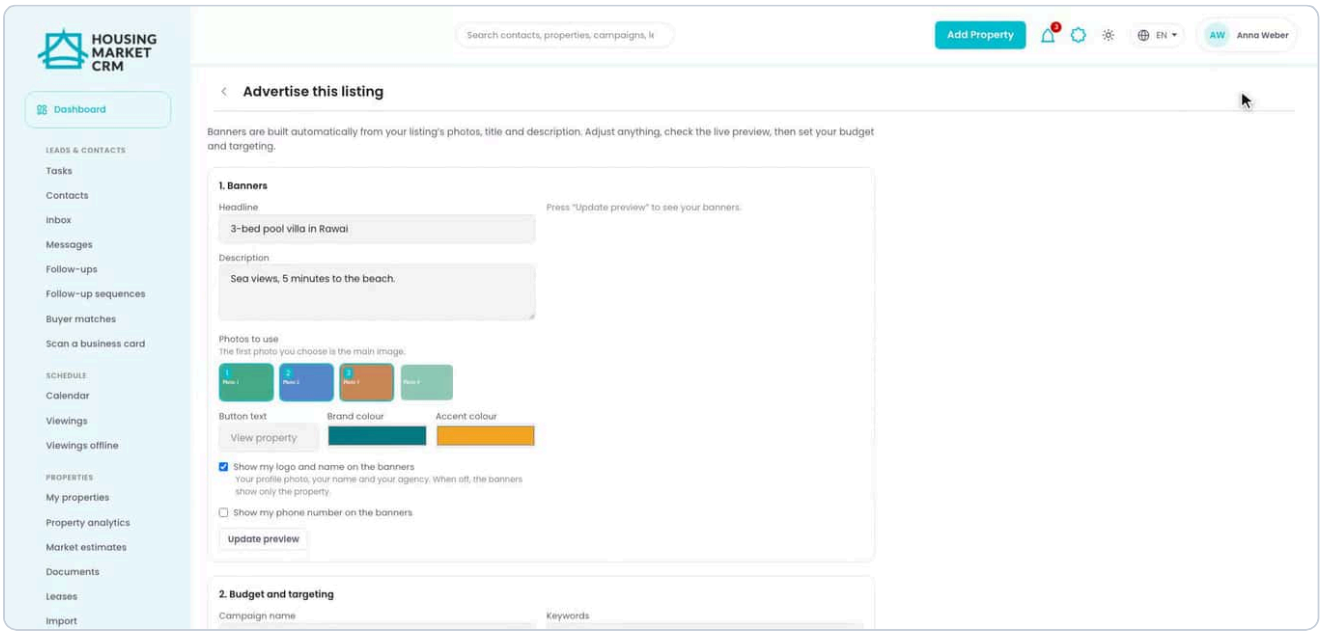


Figure 172.4 · Screen recorded 17 September 2026

5 Pick a listing to advertise.

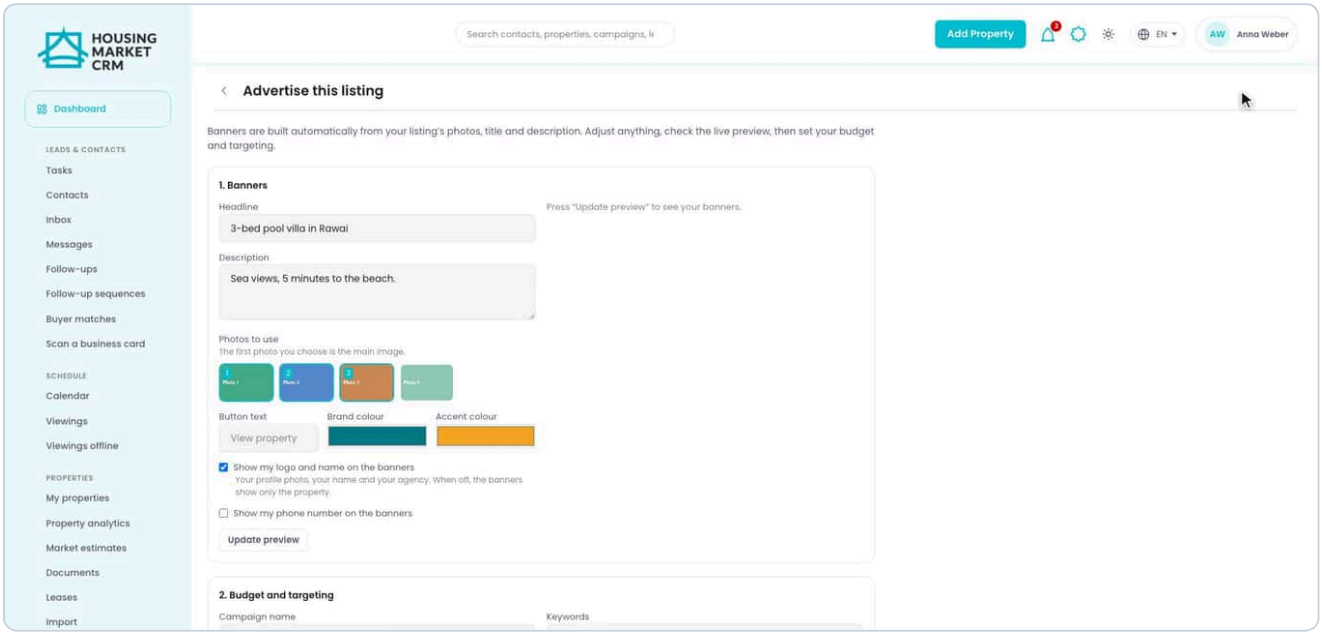


Figure 172.5 · Screen recorded 17 September 2026

6 Banners are built from your listing's **photos and text**.

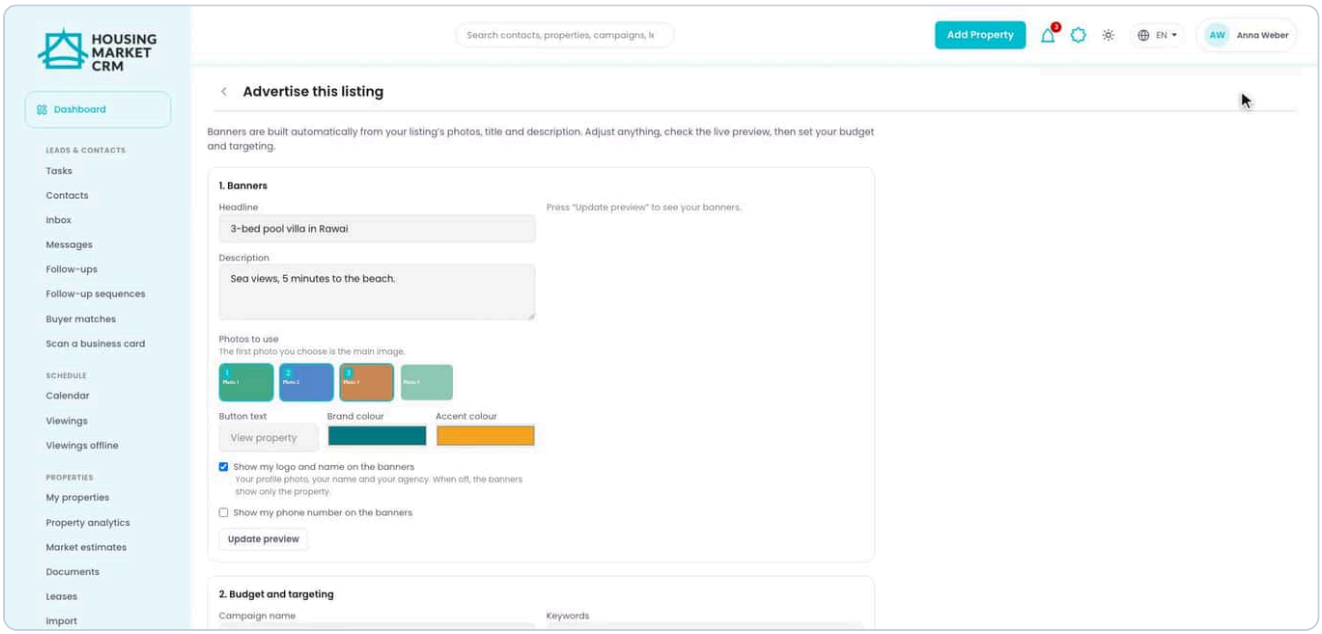


Figure 172.6 · Screen recorded 17 September 2026

7 Adjust the **headline** and click **Update preview**.

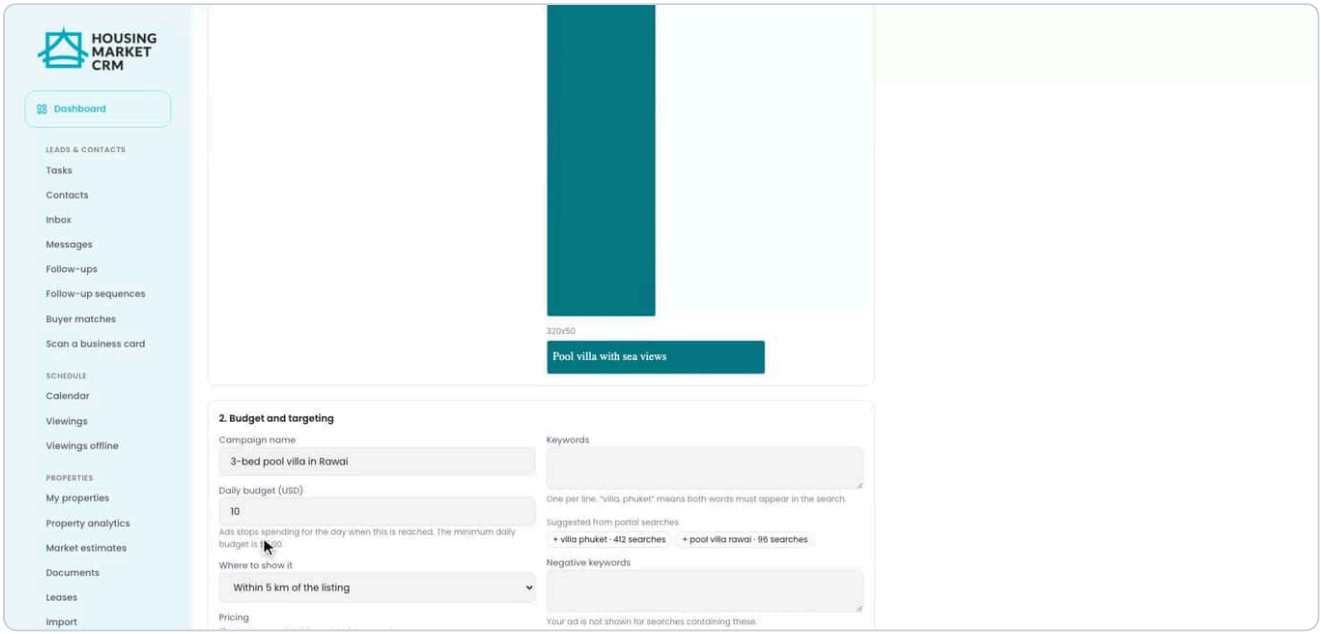


Figure 172.7 · Screen recorded 17 September 2026

8 Set a **daily budget** in US dollars.

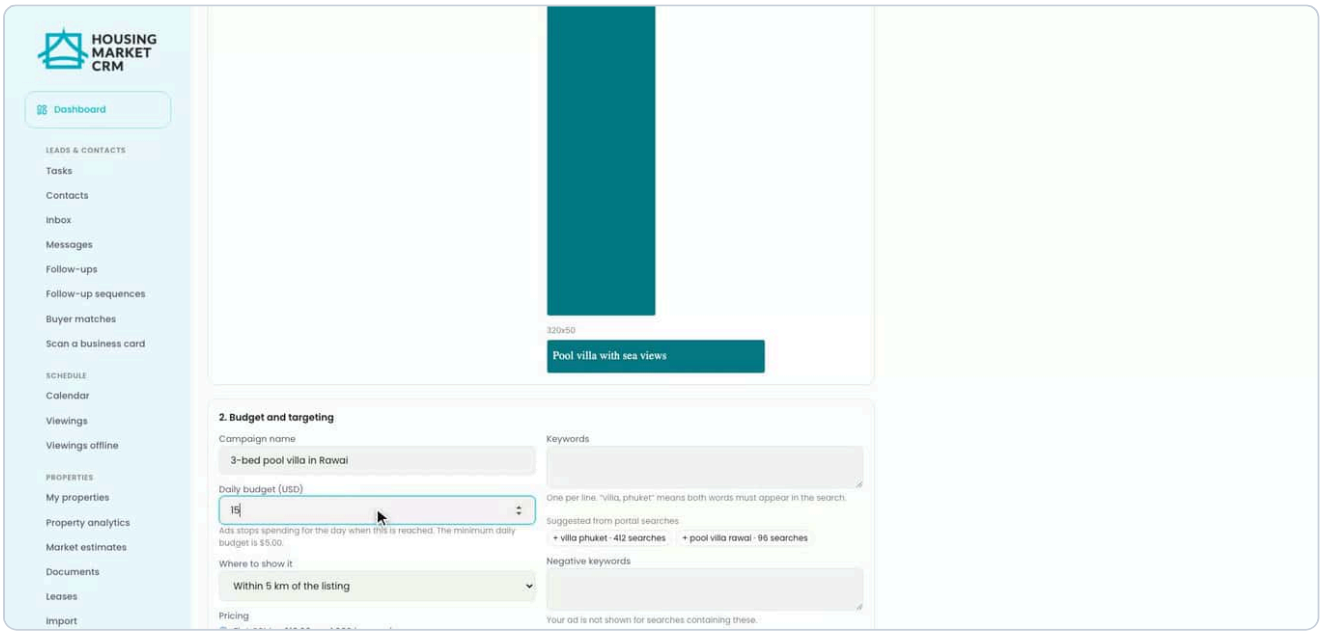


Figure 172.8 · Screen recorded 17 September 2026

9 Choose **where** to show it — e.g. near the listing.

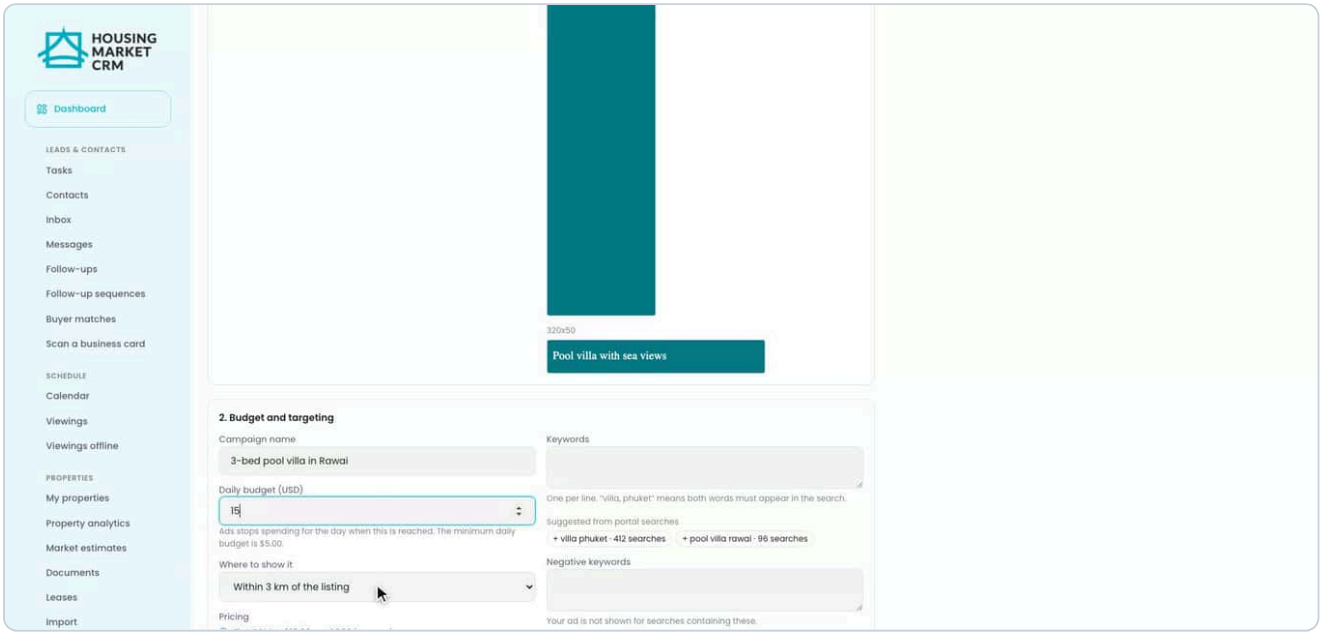


Figure 172.9 · Screen recorded 17 September 2026

10 Billing is a flat **$10 per 1,000 impressions**.

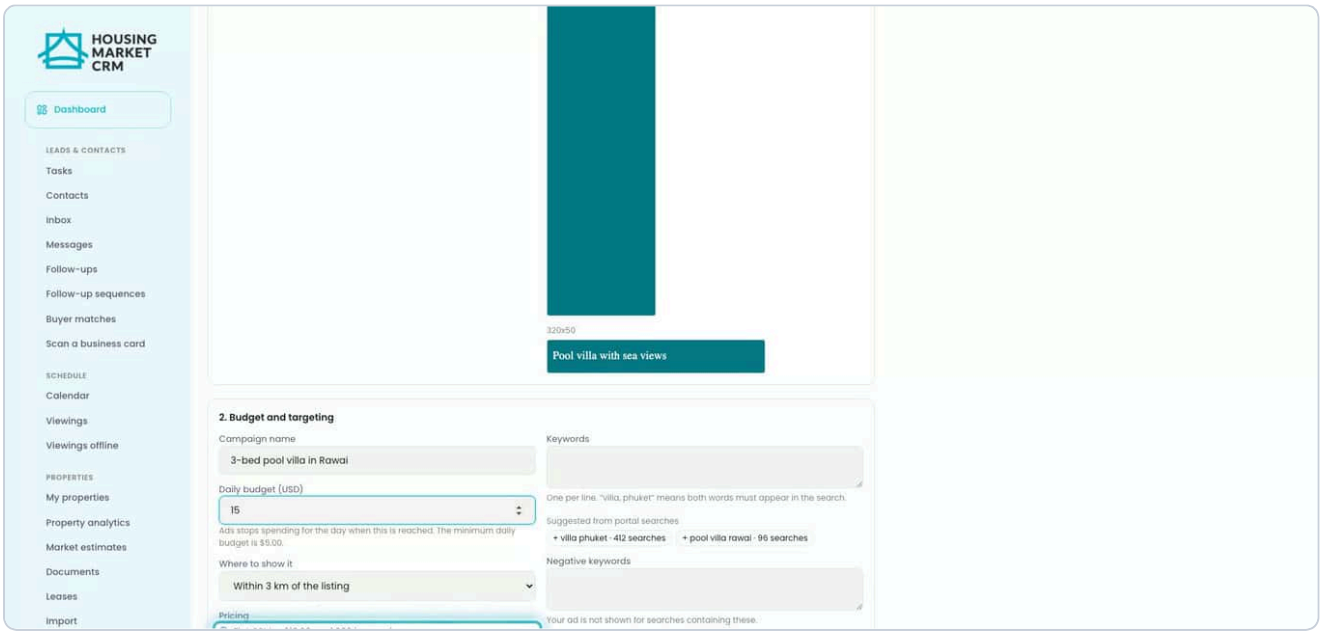


Figure 172.10 · Screen recorded 17 September 2026

11 Add suggested **keywords** — each shows its searches.

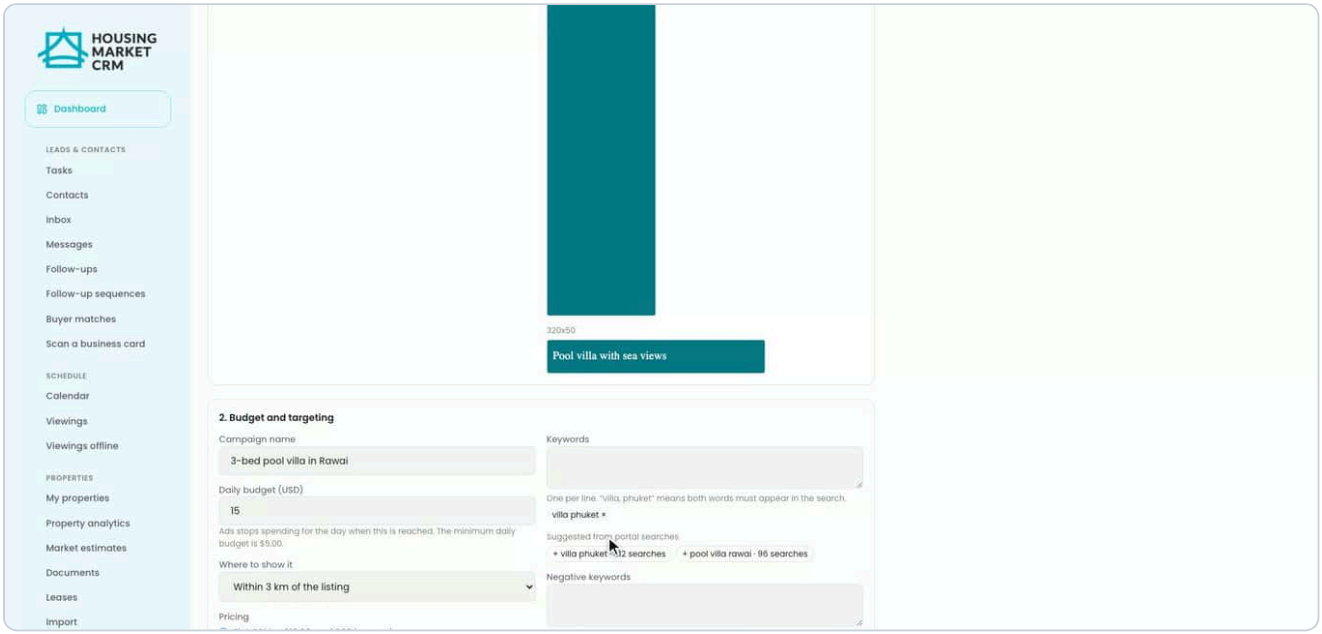


Figure 172.11 · Screen recorded 17 September 2026

12 Add suggested **negative keywords** too.

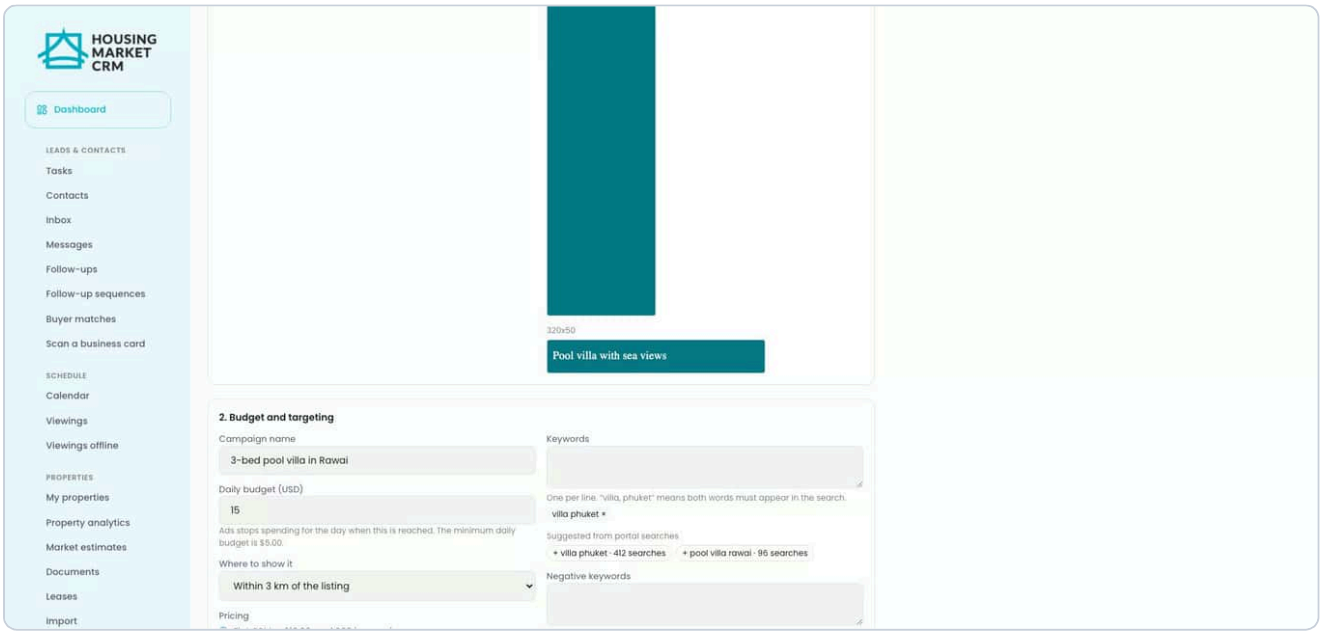


Figure 172.12 · Screen recorded 17 September 2026

13 Click **Create campaign**.

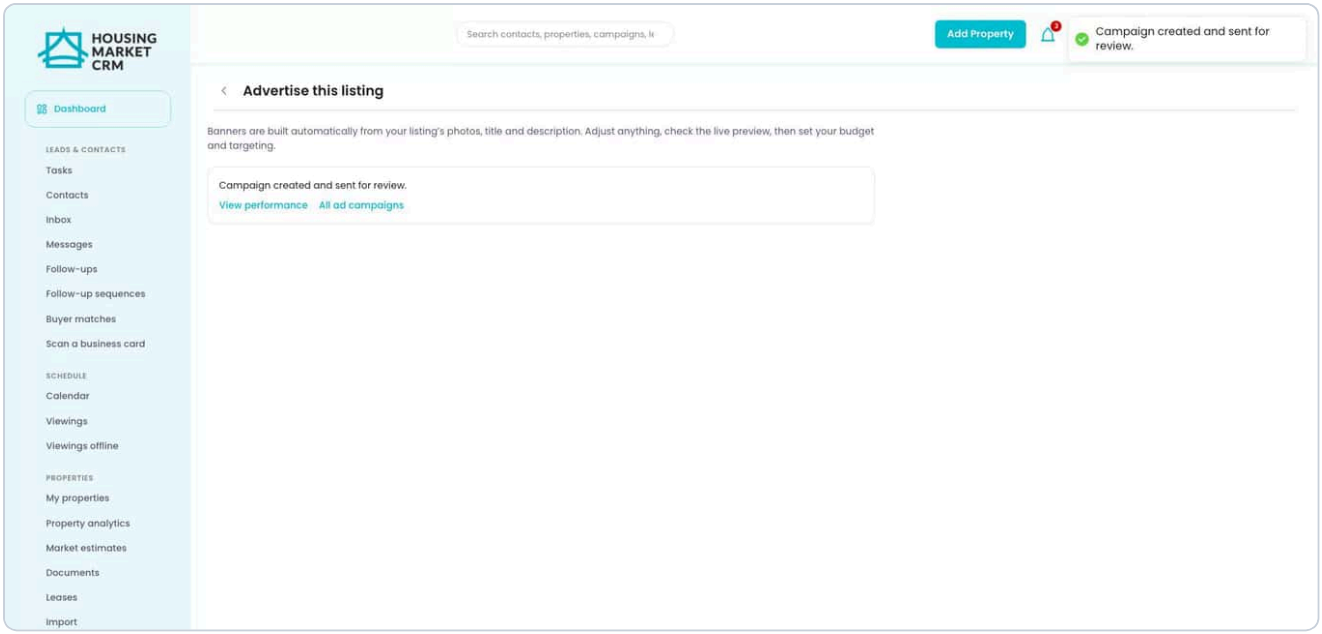


Figure 172.13 · Screen recorded 17 September 2026

14 The campaign is **reviewed**, then starts on the portals.

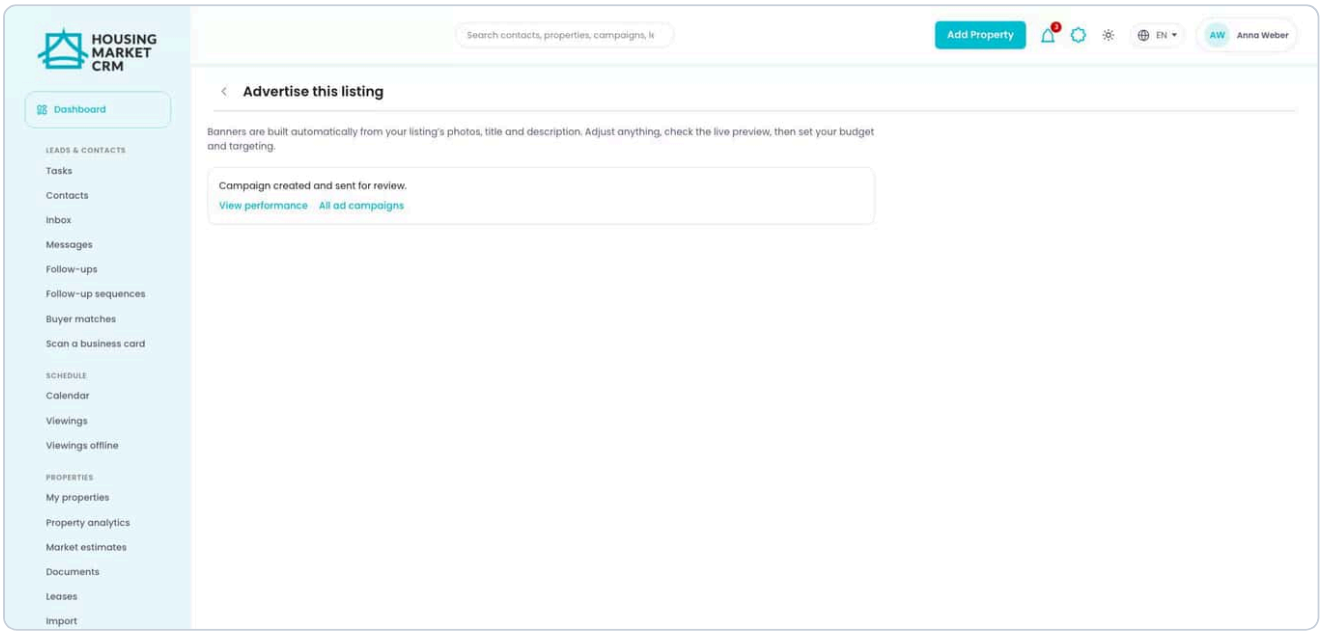


Figure 172.14 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

Is the CRM integrated with Housing Market Group?	faq.housingmarketgroup.com/faq/is-the-crm-integrated-with-housing-market-group

173 CHAPTER 173

API keys and webhooks

Business | For admins | Watch the video

OVERVIEW

Yes, on Business. Create an API key to read and write leads, contacts and deals over REST, and register webhooks to be told when leads, deals and published properties change.

In Settings, open Integrations to create API keys and webhook endpoints. The open API and webhooks are one feature on Business, because a key acts for the whole office rather than for one agent.

REST API

An API key reads and writes leads, contacts and deals, and reads properties. Requests are rate limited, responses are paginated, and CRM sign-in sessions are not accepted in place of a key.

Webhooks

Register an https endpoint and choose the events it receives:

- A lead is created — in the CRM, through the API, or from a portal enquiry
- A lead is updated or reassigned, including a stage change
- A deal changes state in the deal tracker
- A CRM property actually reaches its portal

Every delivery is signed so your system can check it came from us, failed deliveries are retried, and a delivery log shows what was sent and what your endpoint answered. Send test delivers a test event once, so you can check an endpoint before relying on it.

This is the CRM's own API. The Housing Market API for listings and feeds is a separate product with its own documentation.

From the Help Center: **Is there an API and webhooks?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

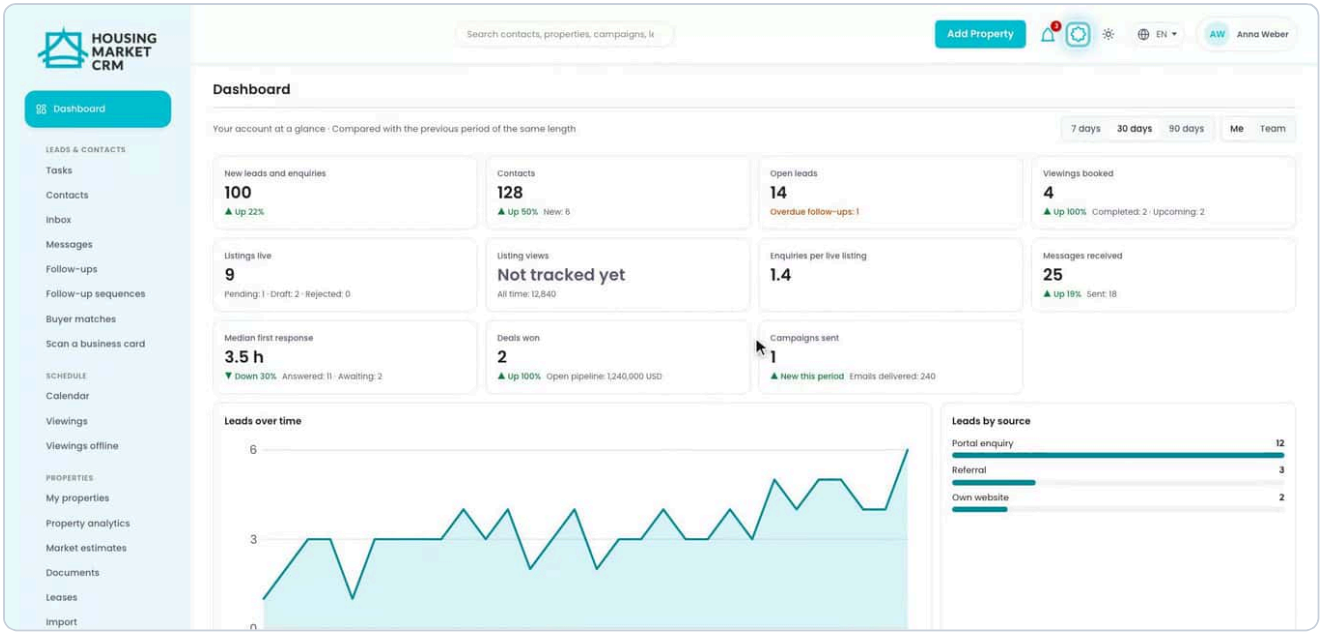


Figure 173.1 · Screen recorded 17 September 2026

2 Click the **Settings** icon at the top.

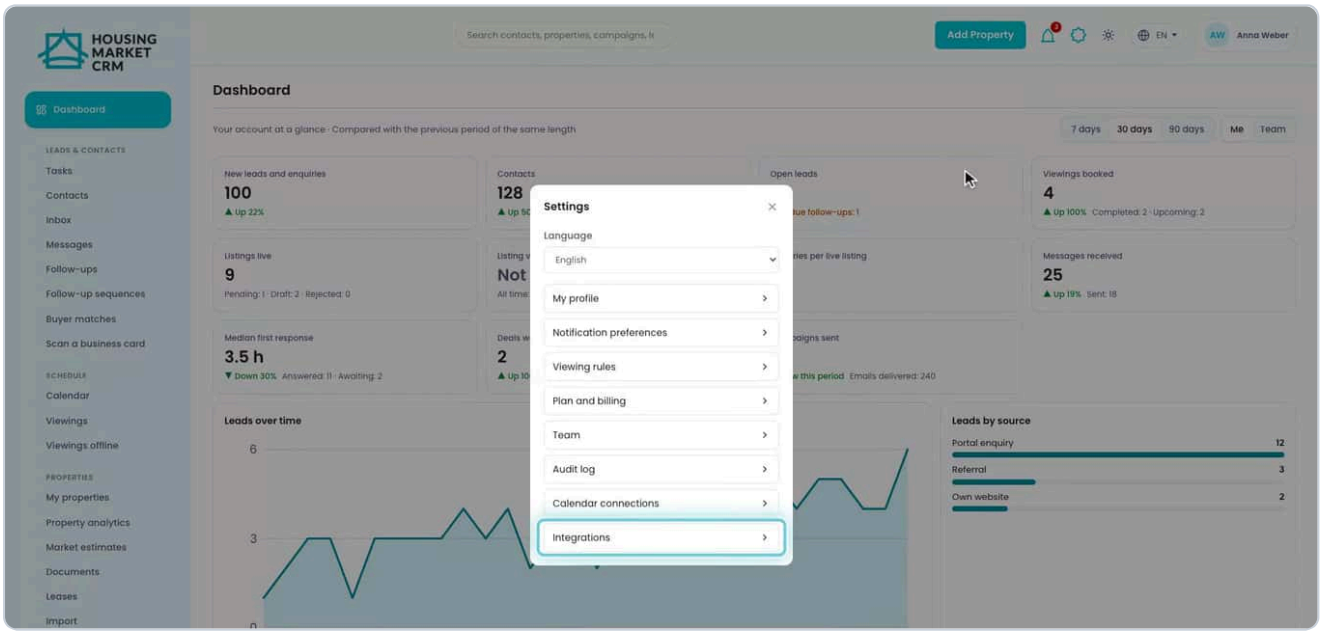


Figure 173.2 · Screen recorded 17 September 2026

3 Choose **Integrations**.

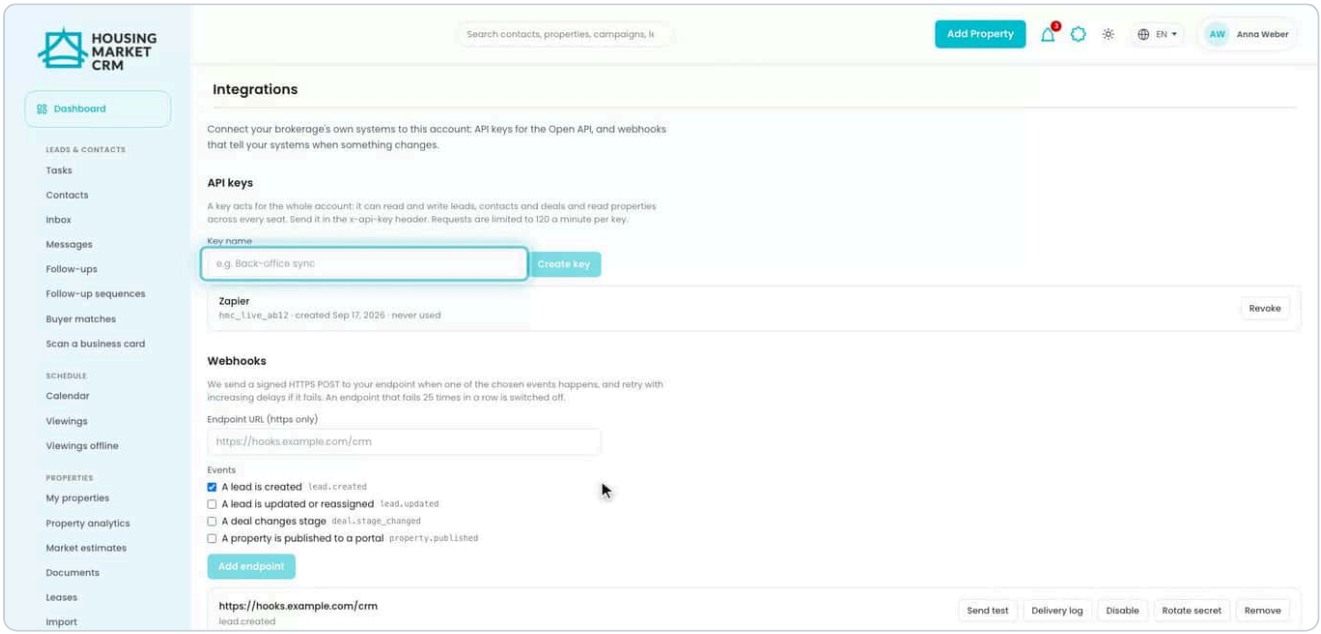


Figure 173.3 · Screen recorded 17 September 2026

4 Name a new **API key** and click **Create key**.

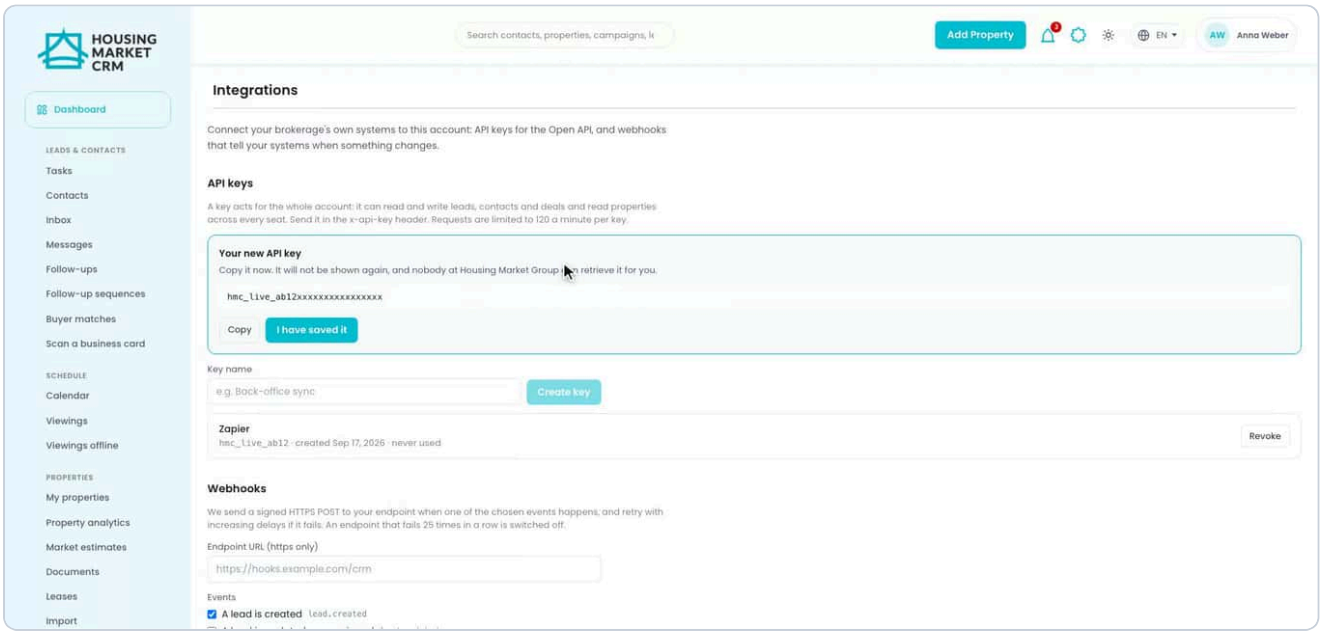


Figure 173.4 · Screen recorded 17 September 2026

5 The key is shown **once** — copy it to a safe place.

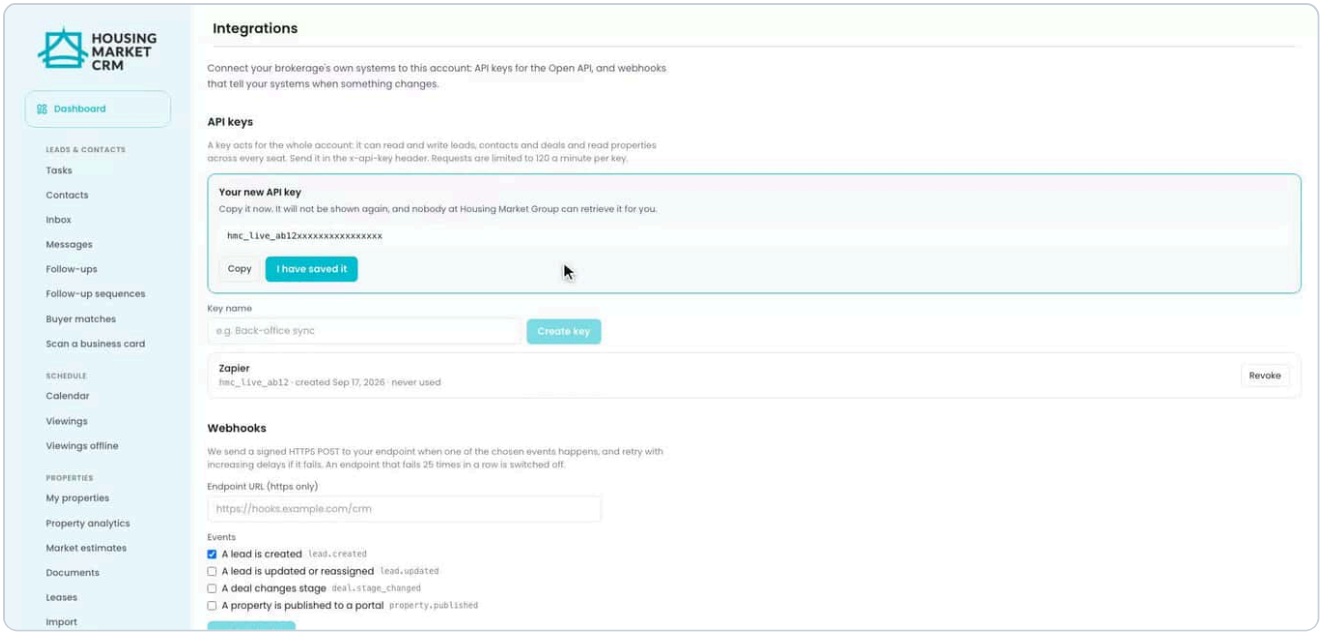


Figure 173.5 · Screen recorded 17 September 2026

6 Under **Webhooks** enter your **HTTPS endpoint**.

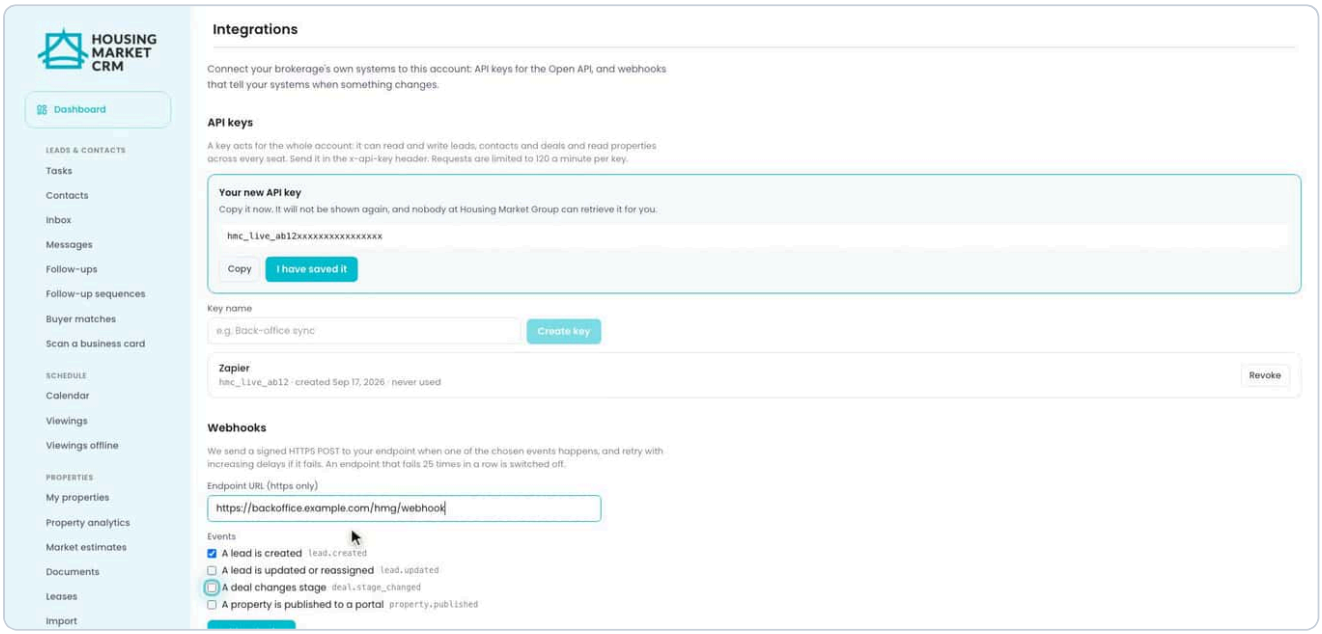


Figure 173.6 · Screen recorded 17 September 2026

7 Tick the **events** to receive.

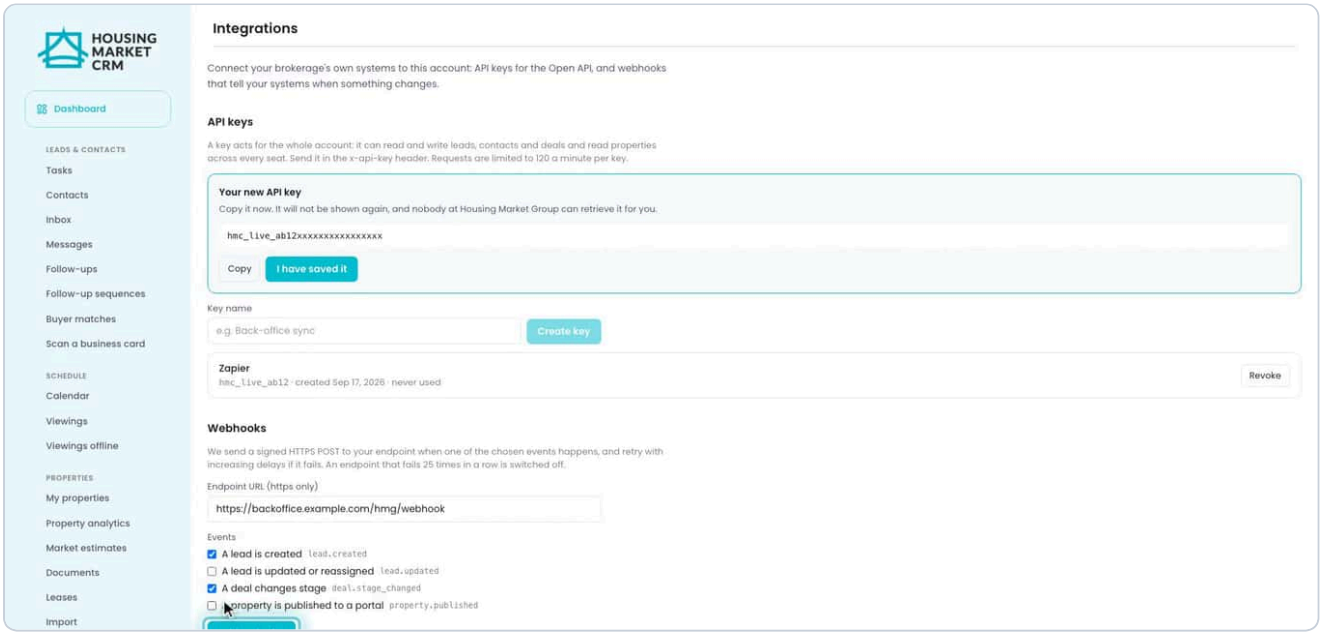


Figure 173.7 · Screen recorded 17 September 2026

8 Click **Add endpoint**.

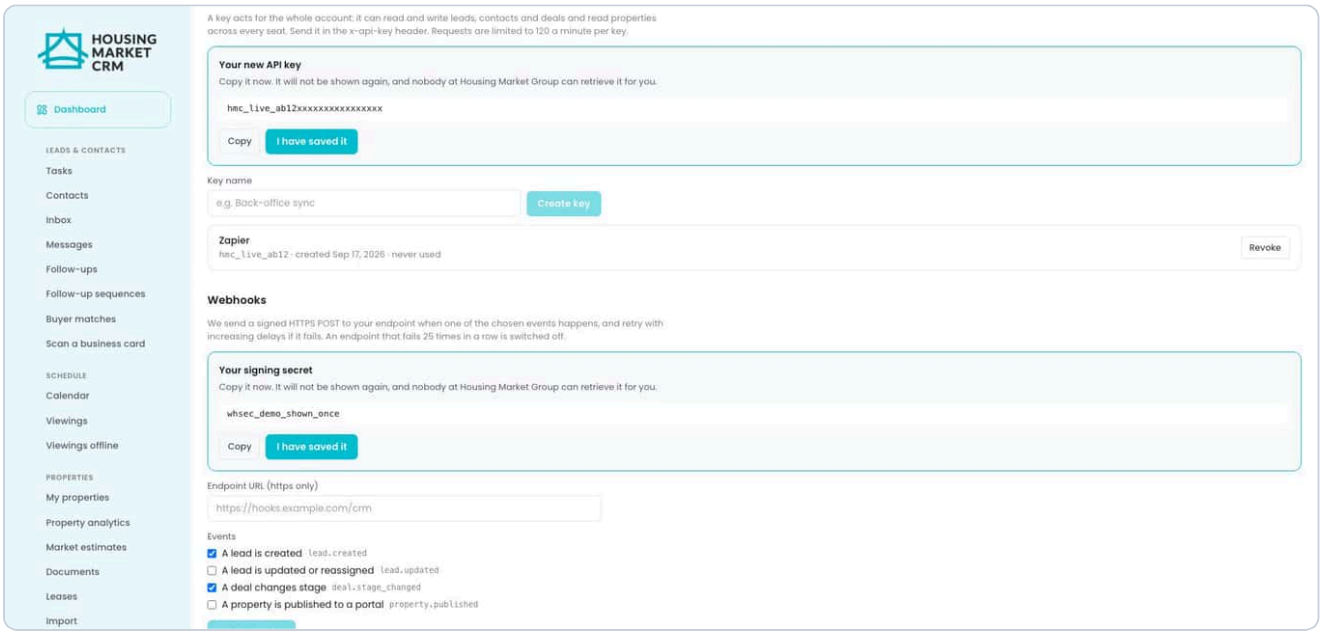


Figure 173.8 · Screen recorded 17 September 2026

9 Use **Send test**, then check the **Delivery log**.



Figure 173.9 · Screen recorded 17 September 2026

RELATED HELP CENTER ARTICLES

Is my data secure?	faq.housingmarketgroup.com/faq/is-my-data-secure

174 CHAPTER 174

Send CRM contacts to Ads as an audience

Pro and Business | For agents | Watch the video

OVERVIEW

Yes. On Pro you can advertise a listing on Housing Market Ads and build Ads audiences from your own contacts without leaving the CRM, and Ads leads arrive in the inbox.

Advertising a listing

In the sidebar, open Property analytics, choose a listing, and choose Advertise in its Advertising panel. The CRM fills the campaign in from the listing, shows you the banners as they will look, suggests keywords from portal search data, and creates the campaign on your Housing Market Ads account, where it goes to our team for review before it runs. The listing then shows how its campaigns are performing. You need a Housing Market Ads account; budgets are in US dollars and Ads bills you for them as it always does — no money passes through the CRM.

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From the Help Center: **Does the CRM work with Housing Market Ads?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

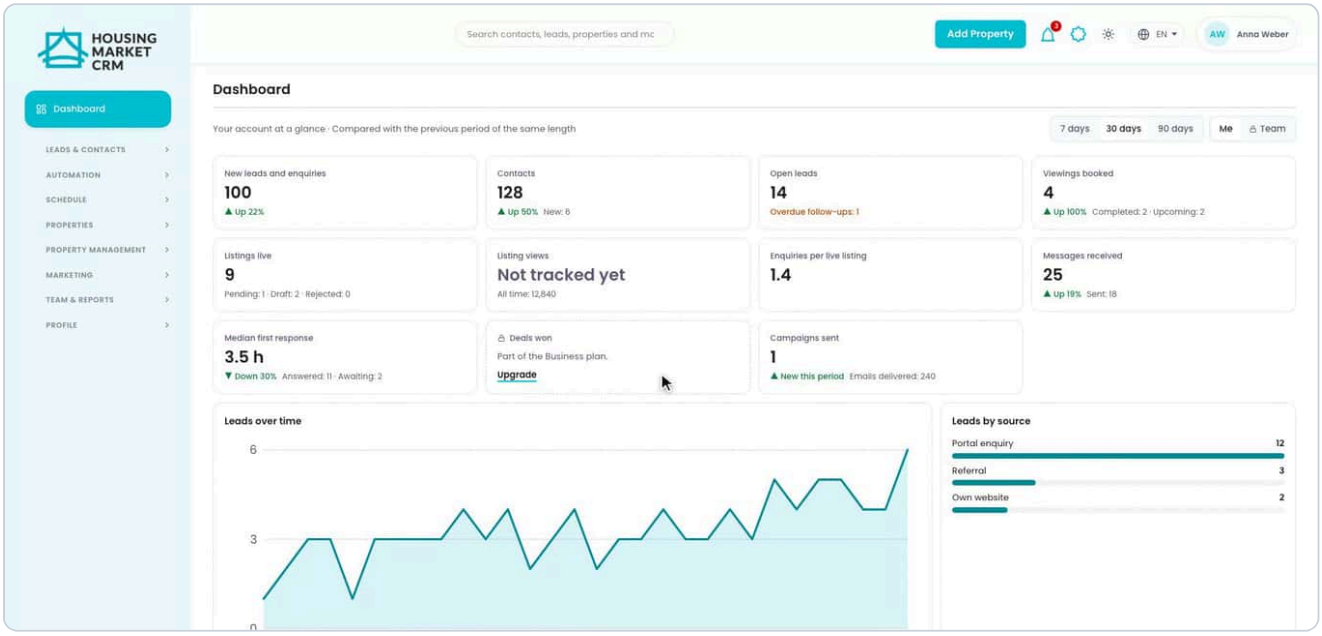


Figure 174.1 · Screen recorded 23 October 2026

2 Open **Marketing** in the left menu.

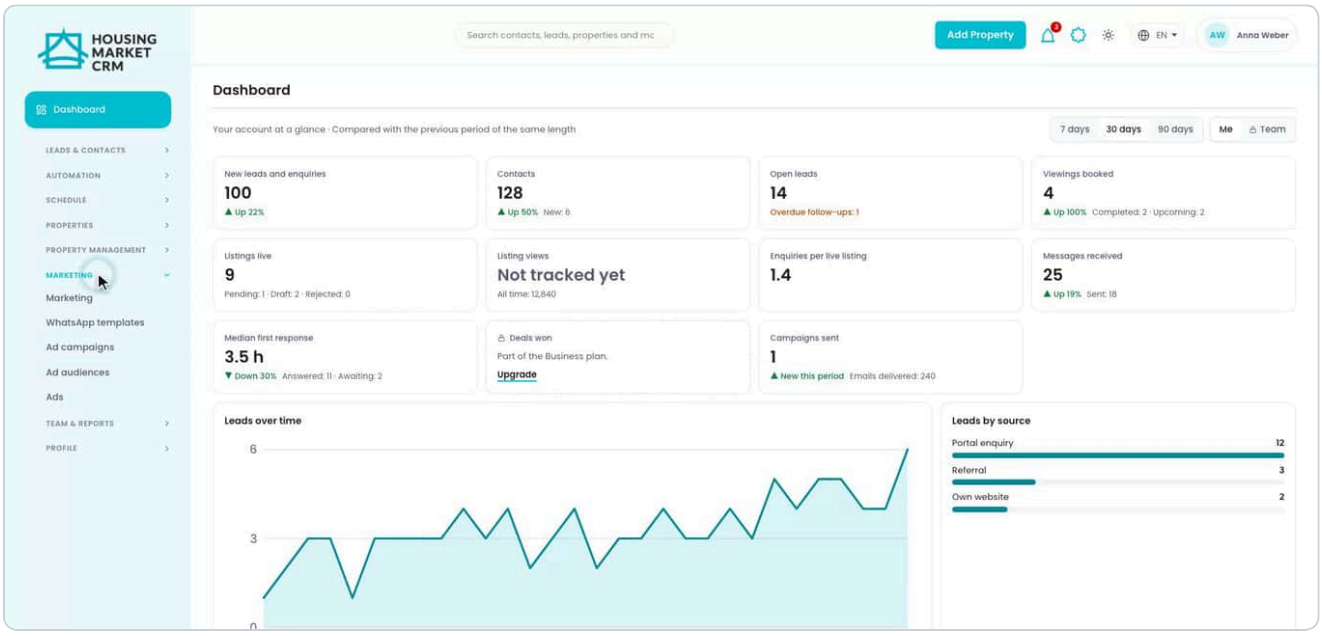


Figure 174.2 · Screen recorded 23 October 2026

3 Click **Ad audiences**.

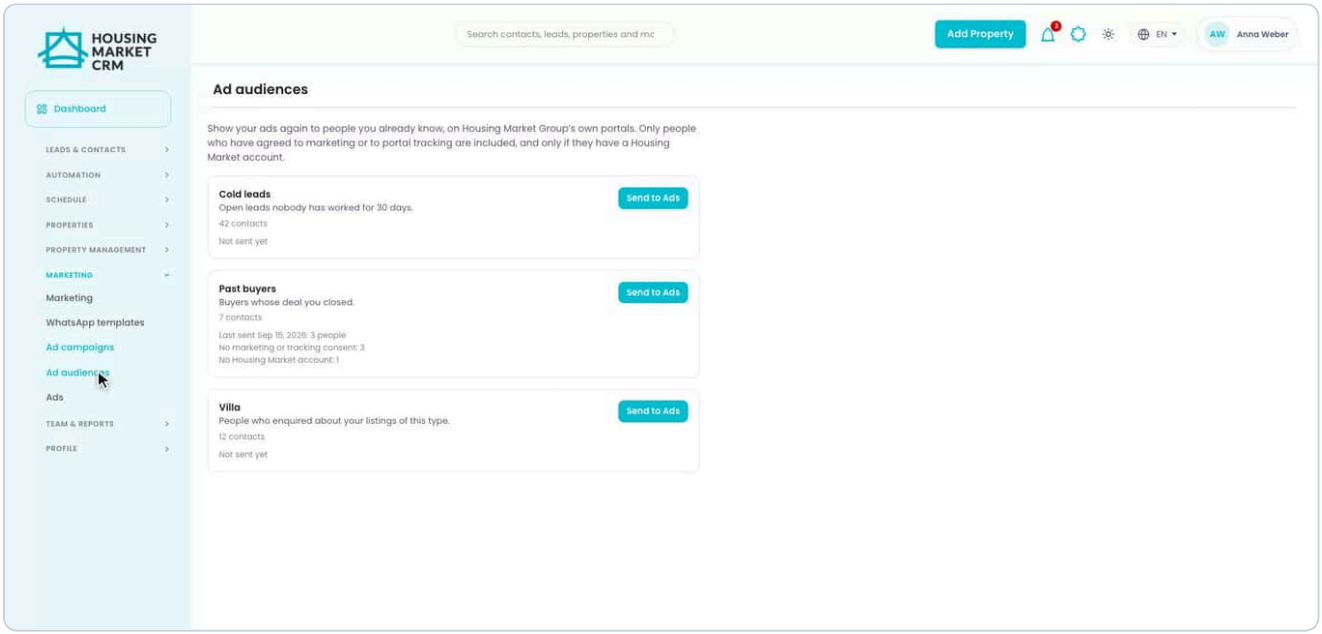


Figure 174.3 · Screen recorded 23 October 2026

4 Show your ads **again** to people you already know.

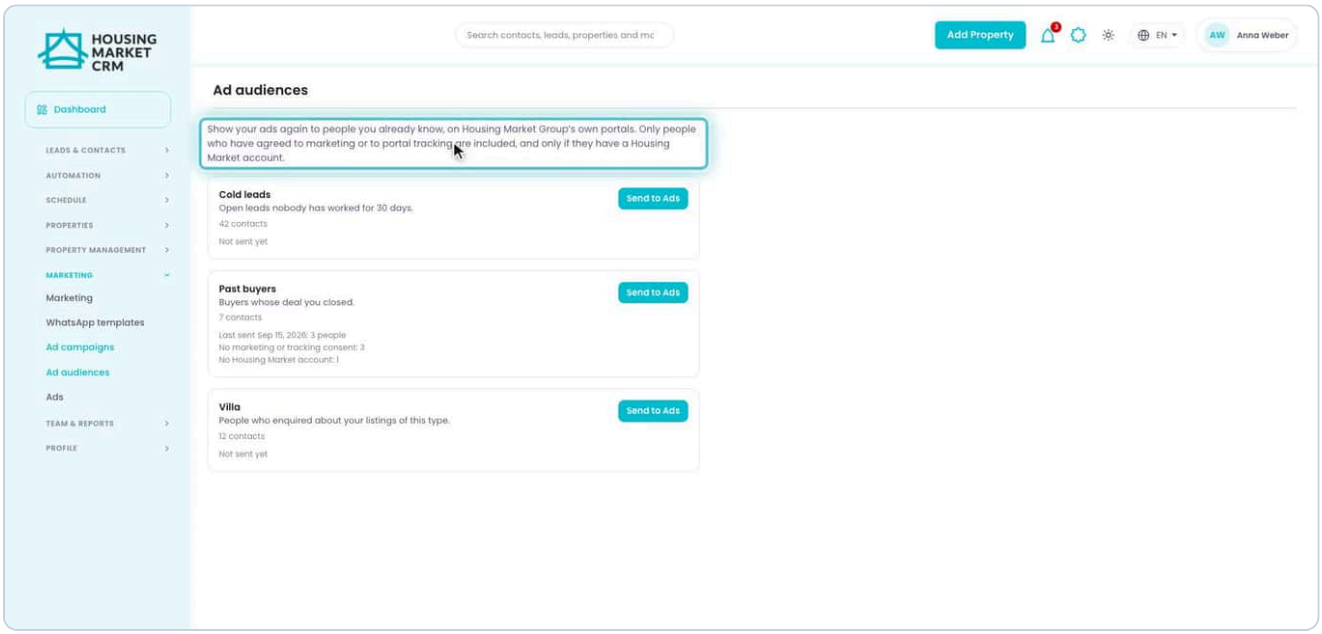


Figure 174.4 · Screen recorded 23 October 2026

5 **Cold leads** are open leads nobody has worked for a while.

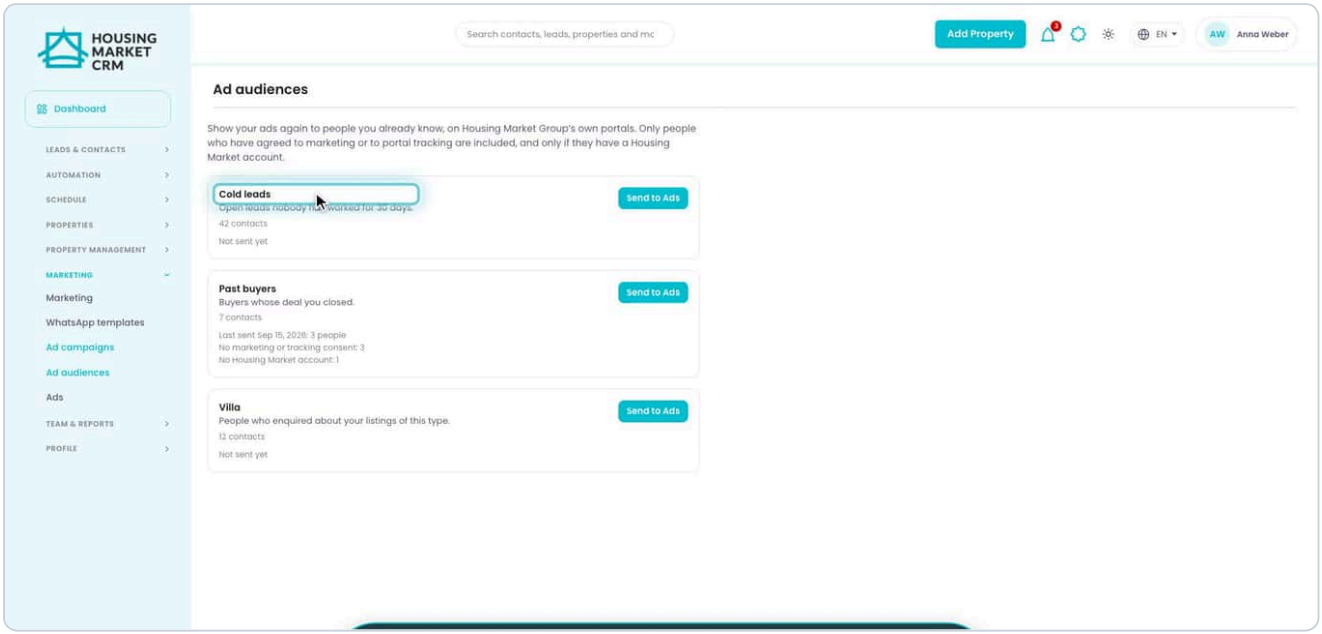


Figure 174.5 · Screen recorded 23 October 2026

6 **Past buyers** are people whose deal you closed.

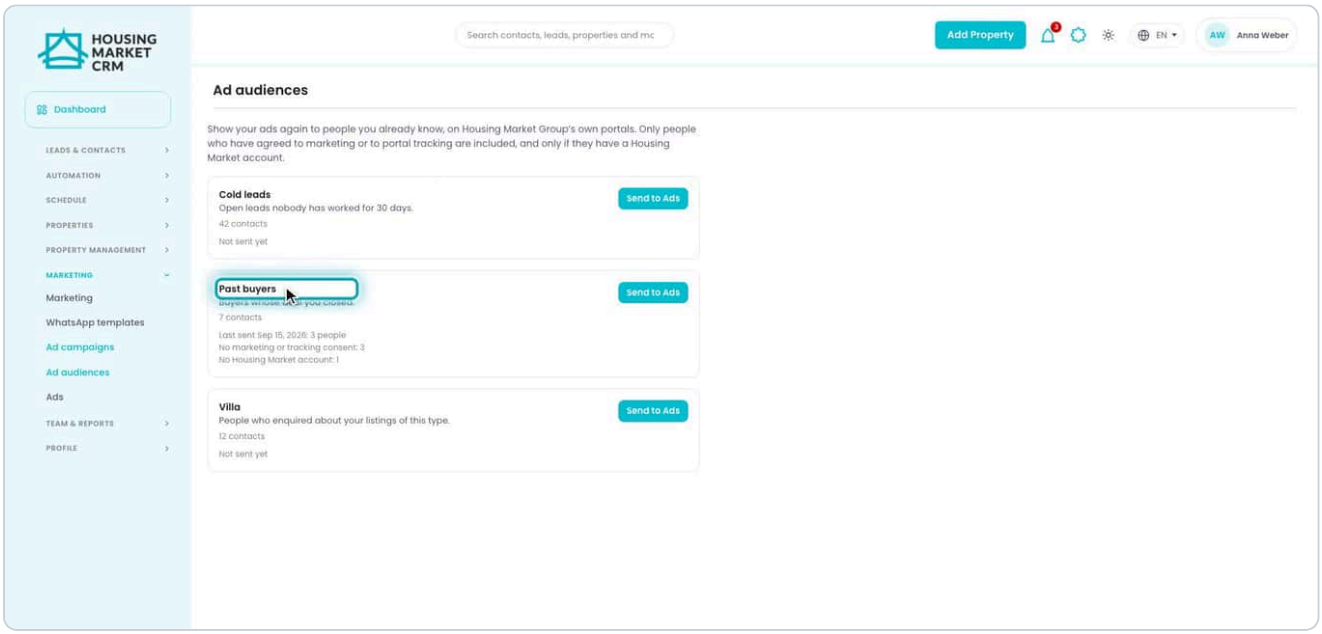


Figure 174.6 · Screen recorded 23 October 2026

7 There is one audience for each **property type** you list.

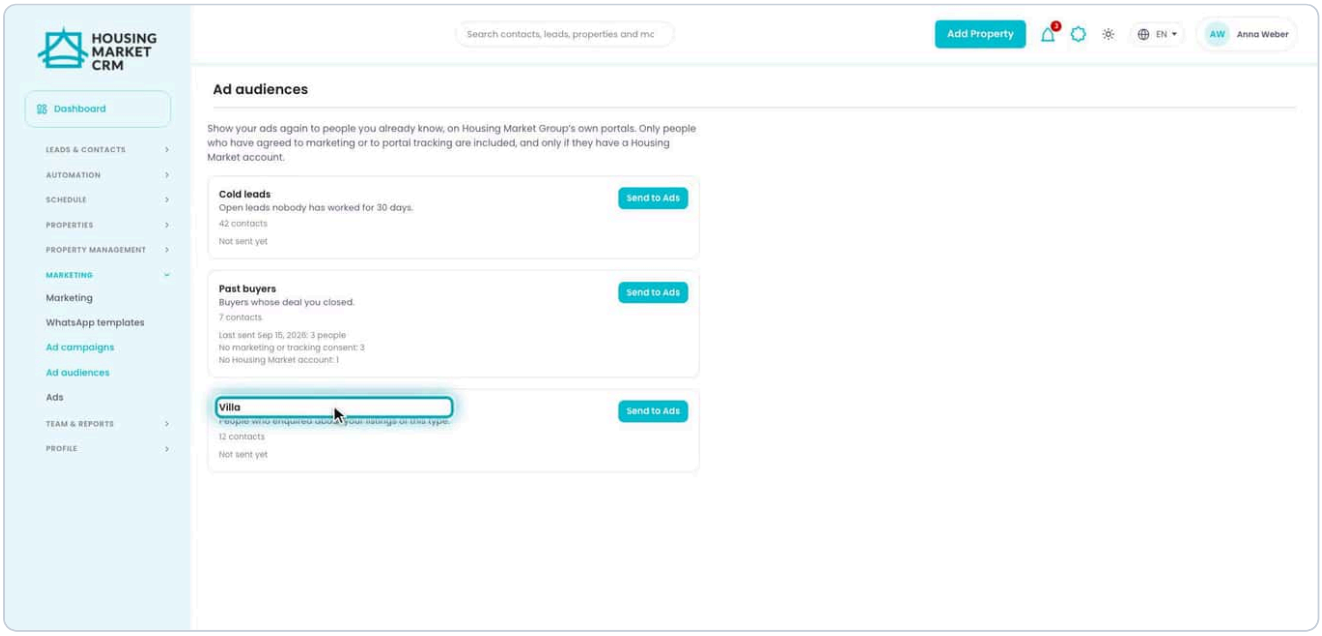


Figure 174.7 · Screen recorded 23 October 2026

8 The screen counts who was **left out**, and why. Never their names.

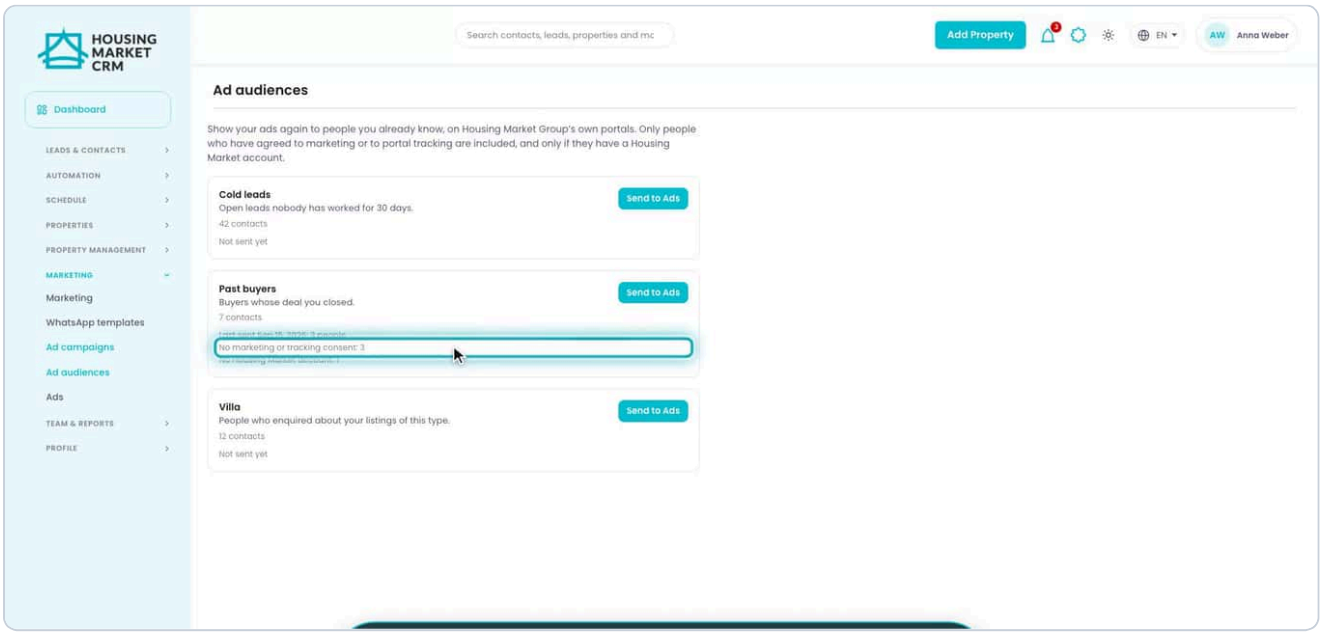


Figure 174.8 · Screen recorded 23 October 2026

9 Click **Send to Ads** to use an audience.

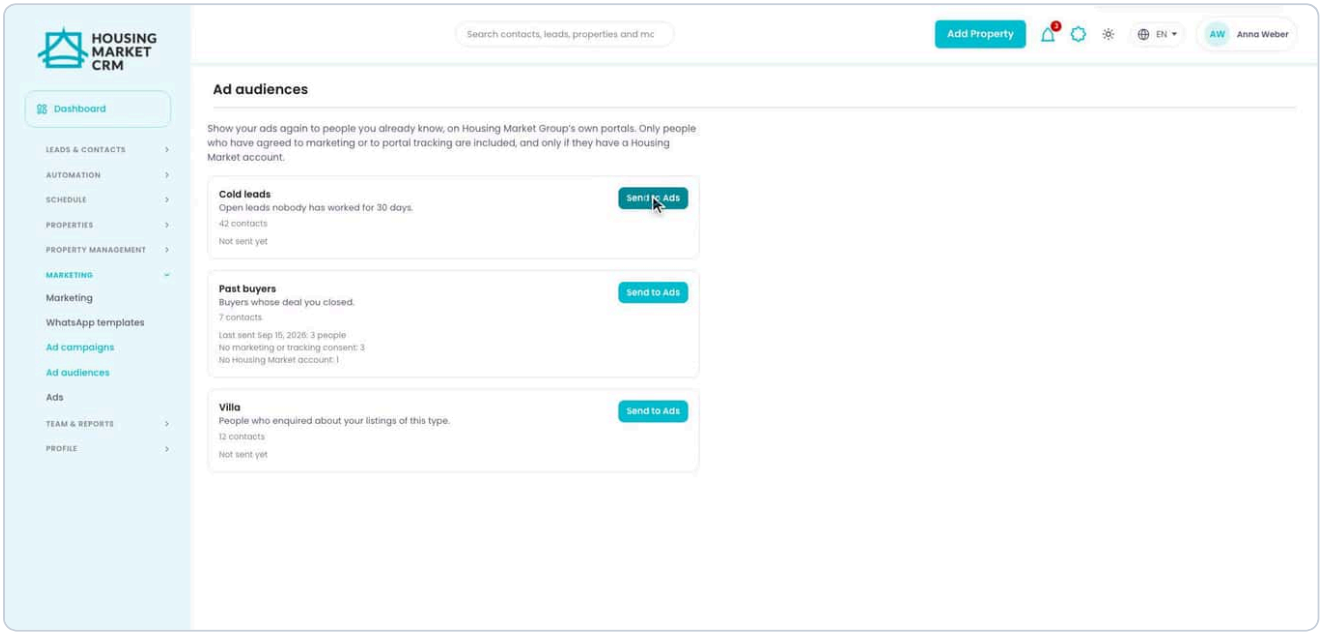


Figure 174.9 · Screen recorded 23 October 2026

10 You see how many people were sent.

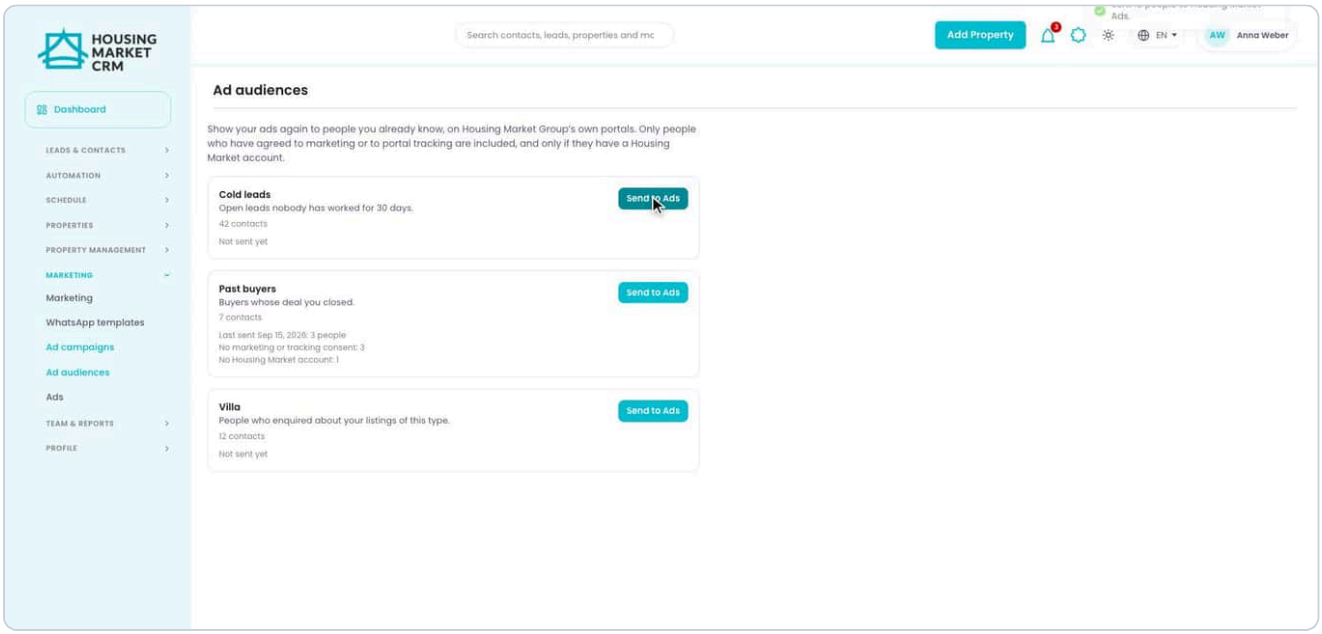


Figure 174.10 · Screen recorded 23 October 2026

11 Only people with consent and a Housing Market account are sent.

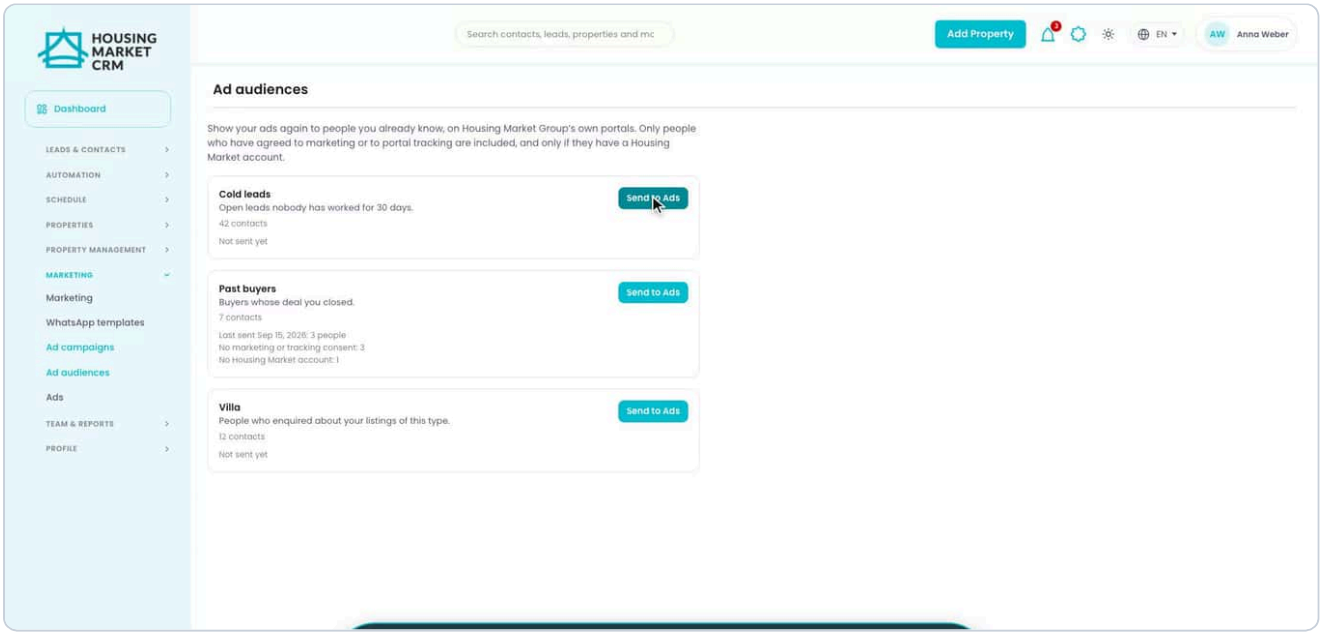


Figure 174.11 · Screen recorded 23 October 2026

RELATED HELP CENTER ARTICLES

Is the CRM integrated with Housing Market Group?	faq.housingmarketgroup.com/faq/is-the-crm-integrated-with-housing-market-group

175 CHAPTER 175

Receive DDproperty leads

Business | For agents in Thailand | Watch the video

OVERVIEW

In Settings, under Integrations, choose Create my webhook URL, copy your private address (it is shown only once) and send it to your DDproperty or PropertyGuru contact over a private channel.

- Open Settings, then Integrations, and find DDproperty leads. The feature is part of the Business plan; on other plans the card says so.
- Choose Create my webhook URL. The CRM shows your private address once. Copy it, then choose I have copied it.
- Send the address to your DDproperty or PropertyGuru contact over a private channel and ask them to deliver your enquiries to it. Anyone who has the address can add leads to your CRM, so do not post it anywhere public.
- Wait for the first enquiry. The card shows Last lead received with the date once one has arrived, and No lead received yet until then.

The address is shown only once. If you lose it, choose Rotate URL: the old address stops working immediately, so DDproperty stops delivering until you give them the new one, which is also shown once. Choose Revoke URL to stop DDproperty adding leads altogether; the leads you already have stay in your CRM, and you can create a new address later.

Under Advanced you can enter a shared secret, with the header name it arrives in, and a list of allowed IP ranges, if PropertyGuru gave you them. Most agents leave both empty, because the private address already identifies your account.

From the Help Center: **How do I connect DDproperty to Housing Market CRM?**

STEP BY STEP

1 Open your **Housing Market CRM** account.

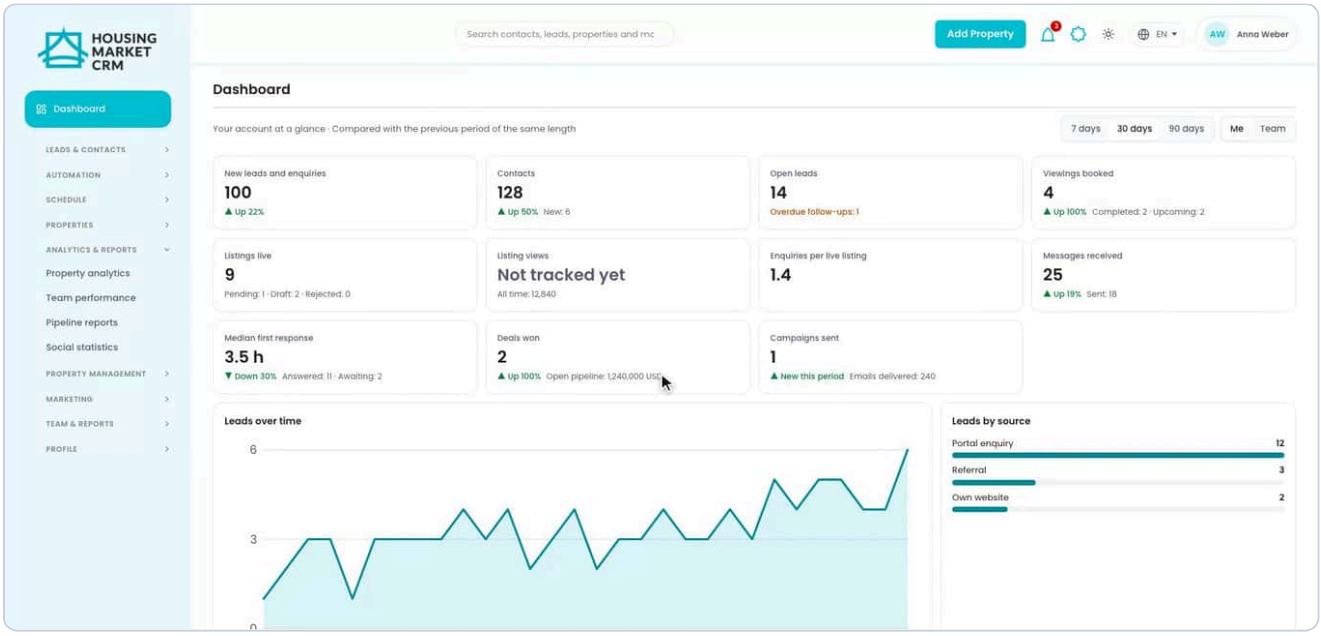


Figure 175.1 · Screen recorded 28 October 2026

2 Click the **Settings** icon at the top.

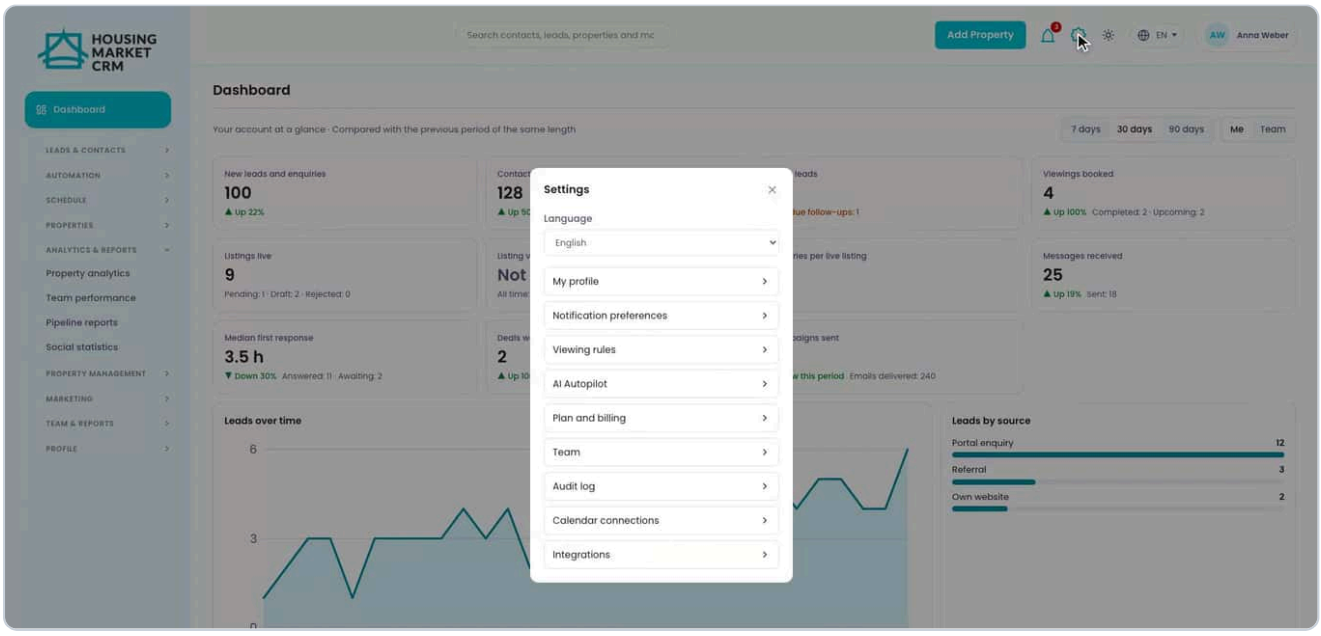


Figure 175.2 · Screen recorded 28 October 2026

3 Choose **Integrations**.

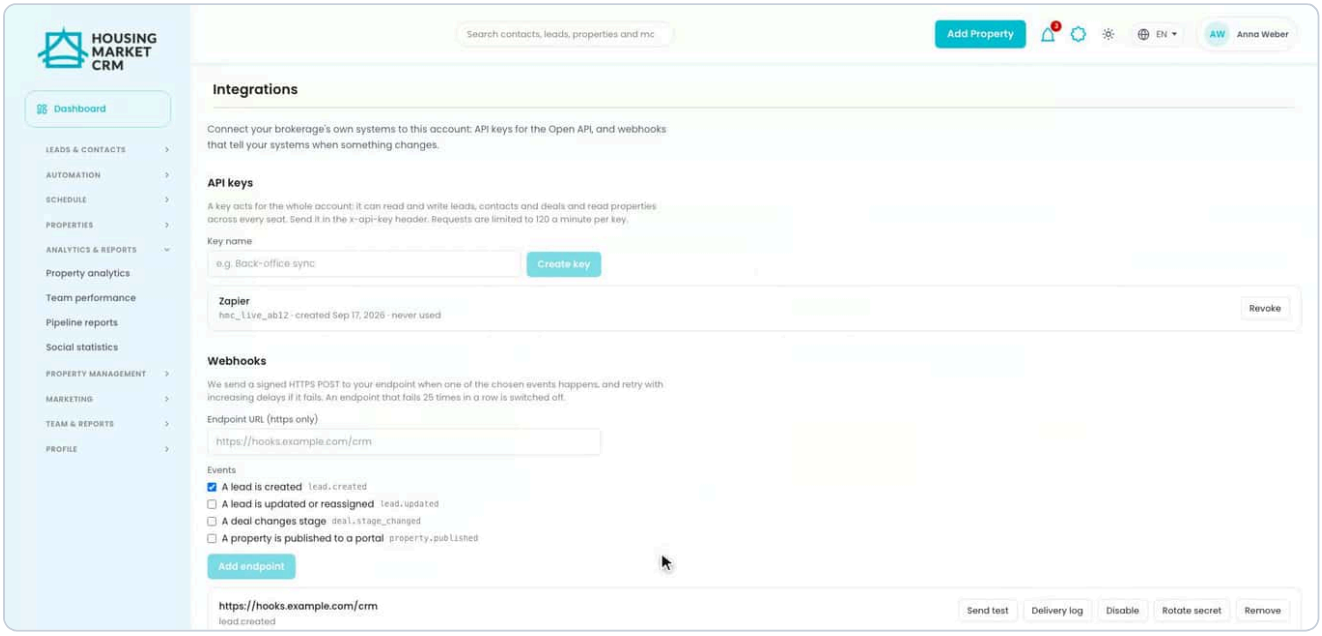


Figure 175.3 · Screen recorded 28 October 2026

4 Scroll to **DDproperty leads**.

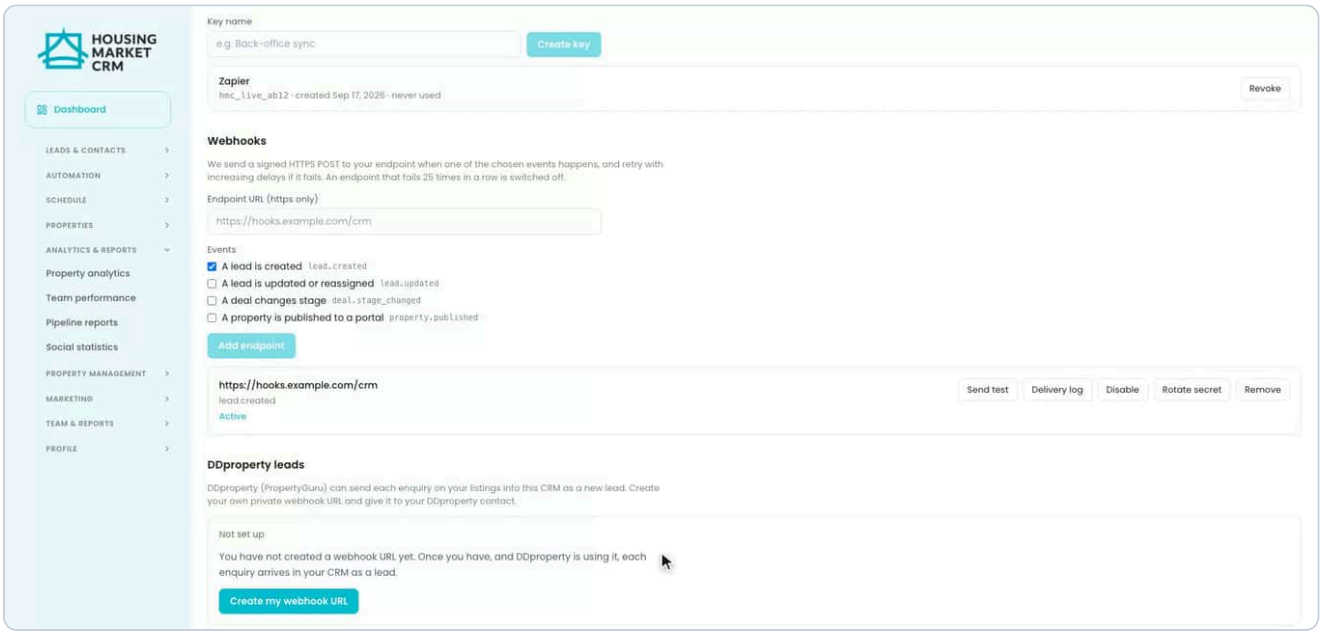


Figure 175.4 · Screen recorded 28 October 2026

5 Every **enquiry on your DDproperty listings** can arrive here as a new lead.

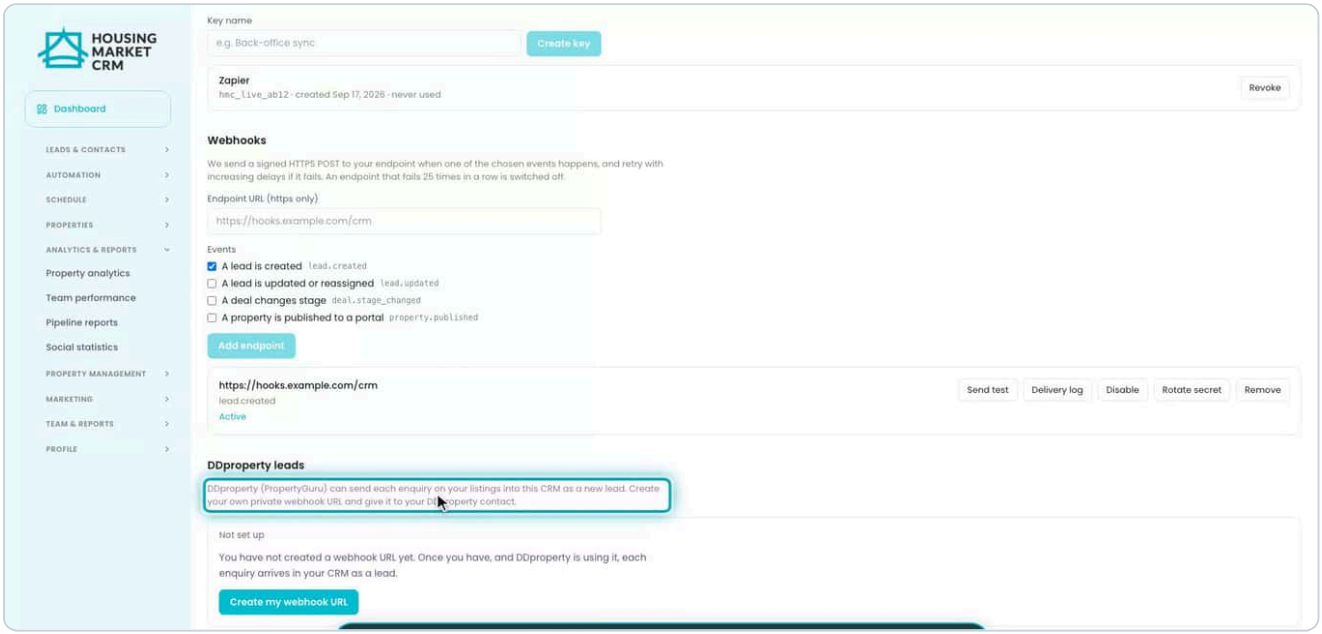


Figure 175.5 · Screen recorded 28 October 2026

6 Click **Create my webhook URL**.

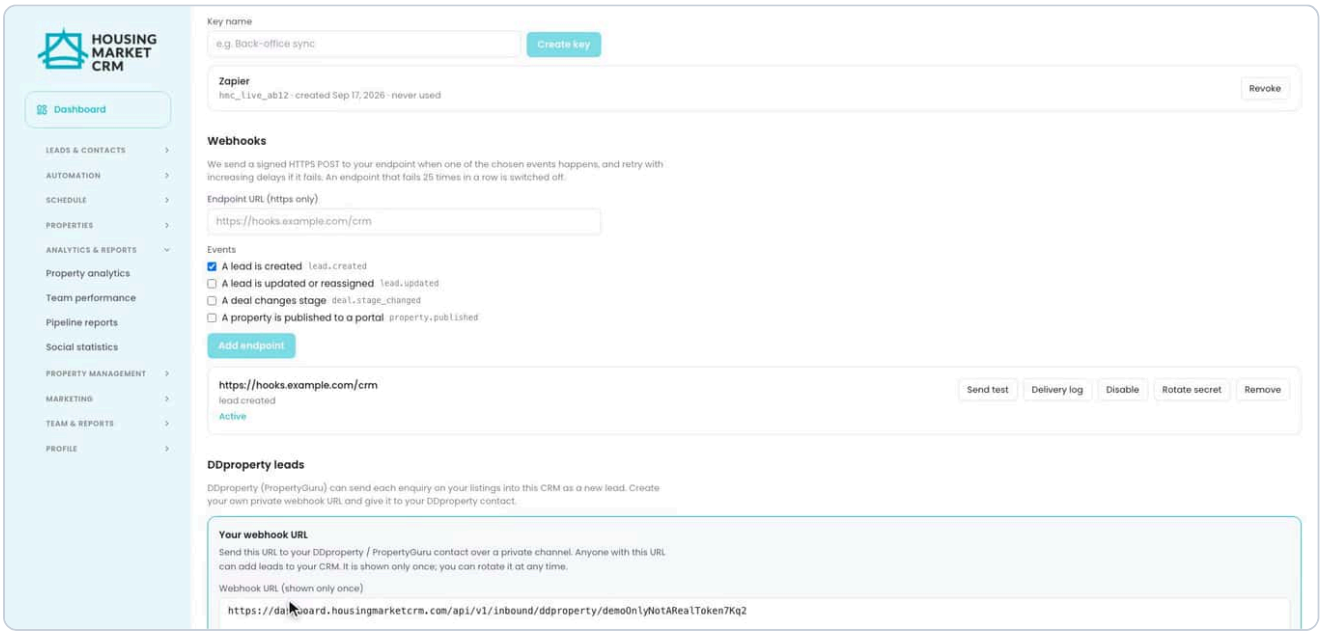


Figure 175.6 · Screen recorded 28 October 2026

7 This is **your private URL**. It is shown **only once**.

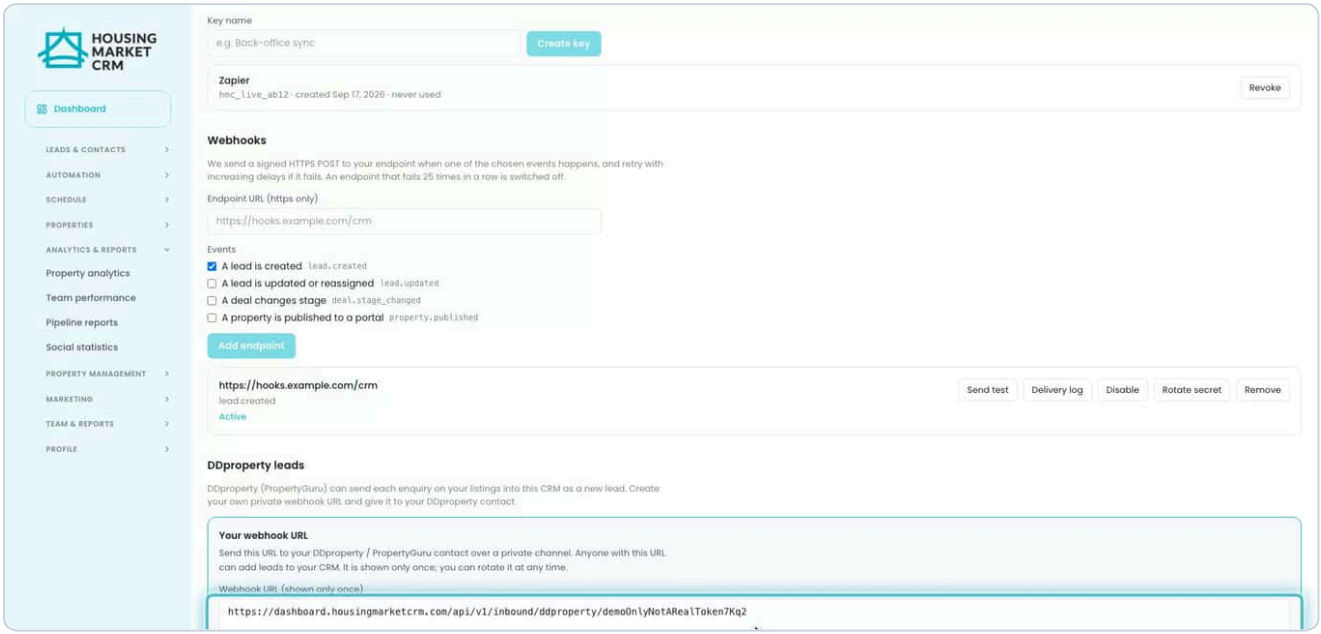


Figure 175.7 · Screen recorded 28 October 2026

8 Click **Copy**, then send it to your **DDproperty contact** privately.

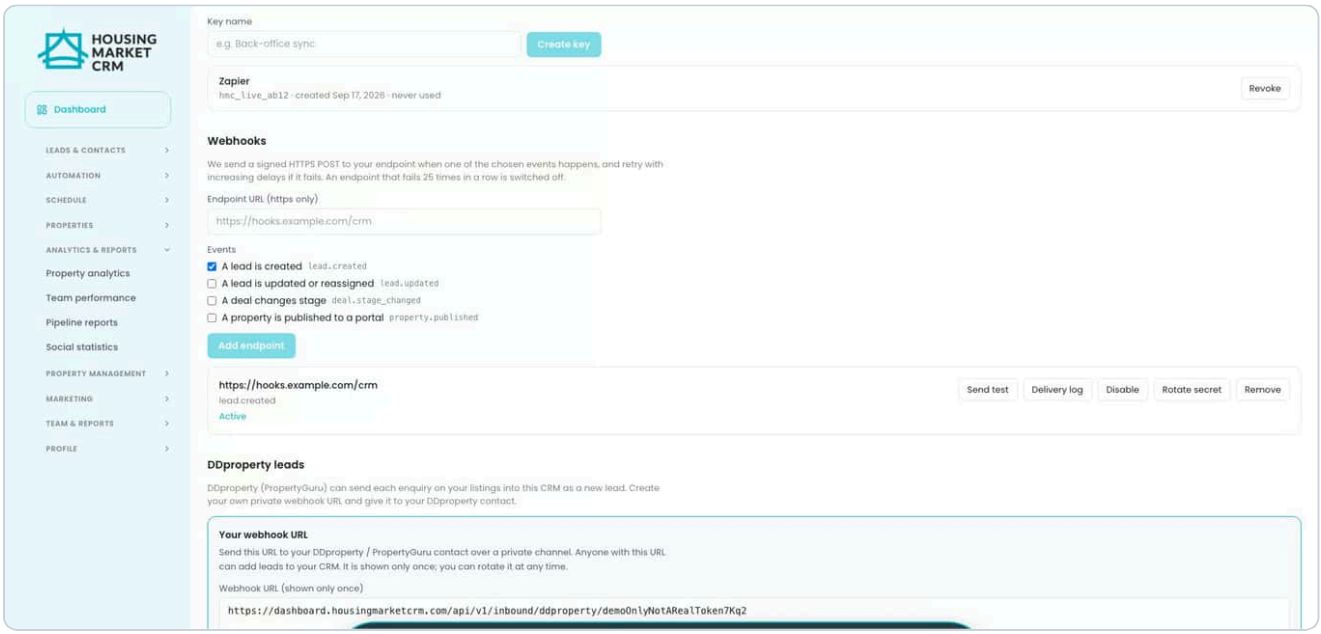


Figure 175.8 · Screen recorded 28 October 2026

9 Click **I have copied it**.

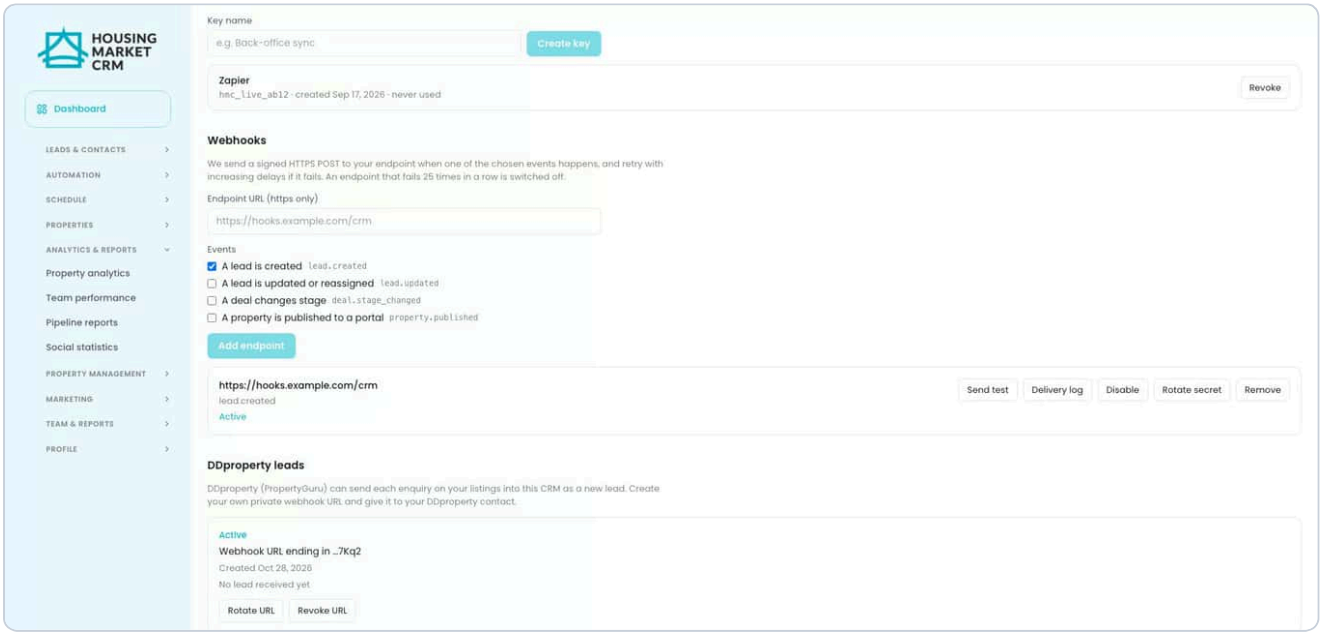


Figure 175.9 · Screen recorded 28 October 2026

10 The card now shows your URL as **Active**.

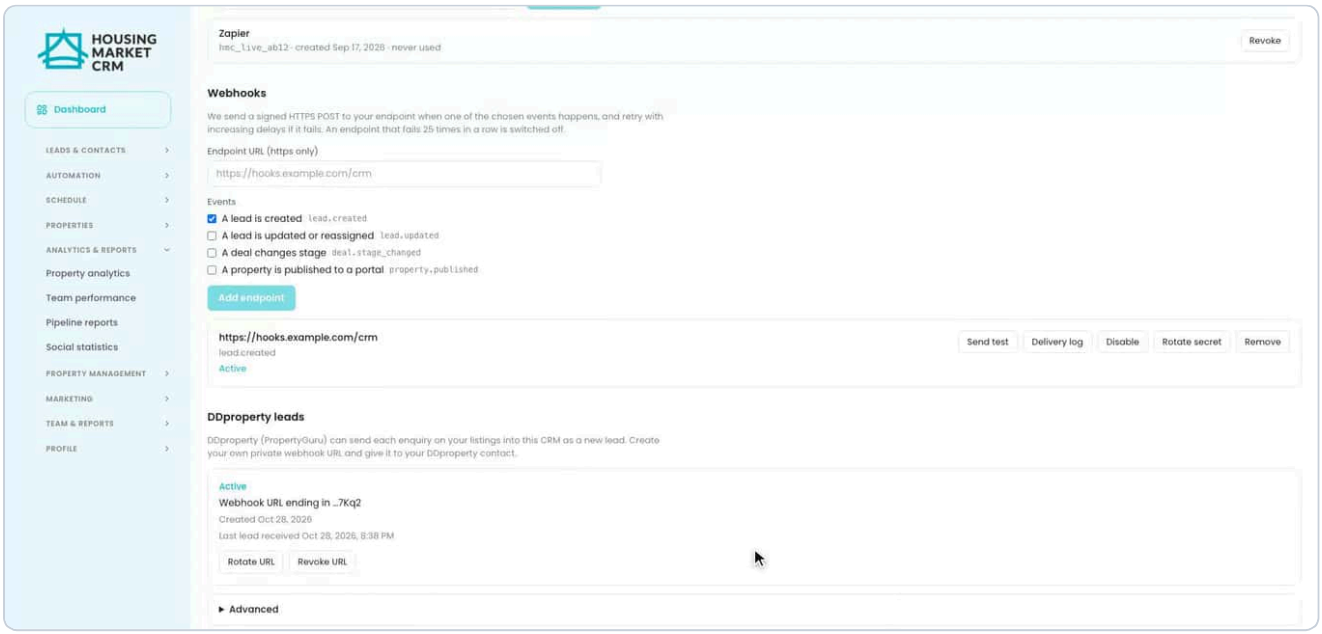


Figure 175.10 · Screen recorded 28 October 2026

11 Once DDproperty uses it, you see when the **last lead** arrived.

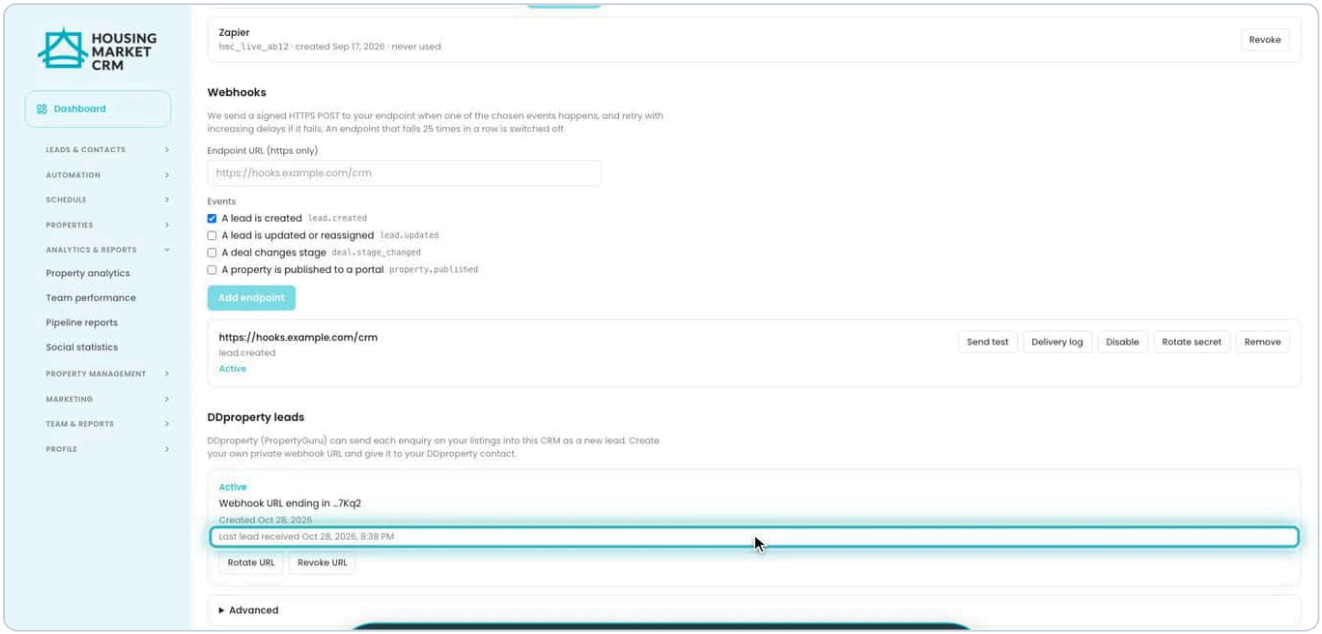


Figure 175.11 · Screen recorded 28 October 2026

12 URL leaked? **Rotate** it and give DDproperty the new one.

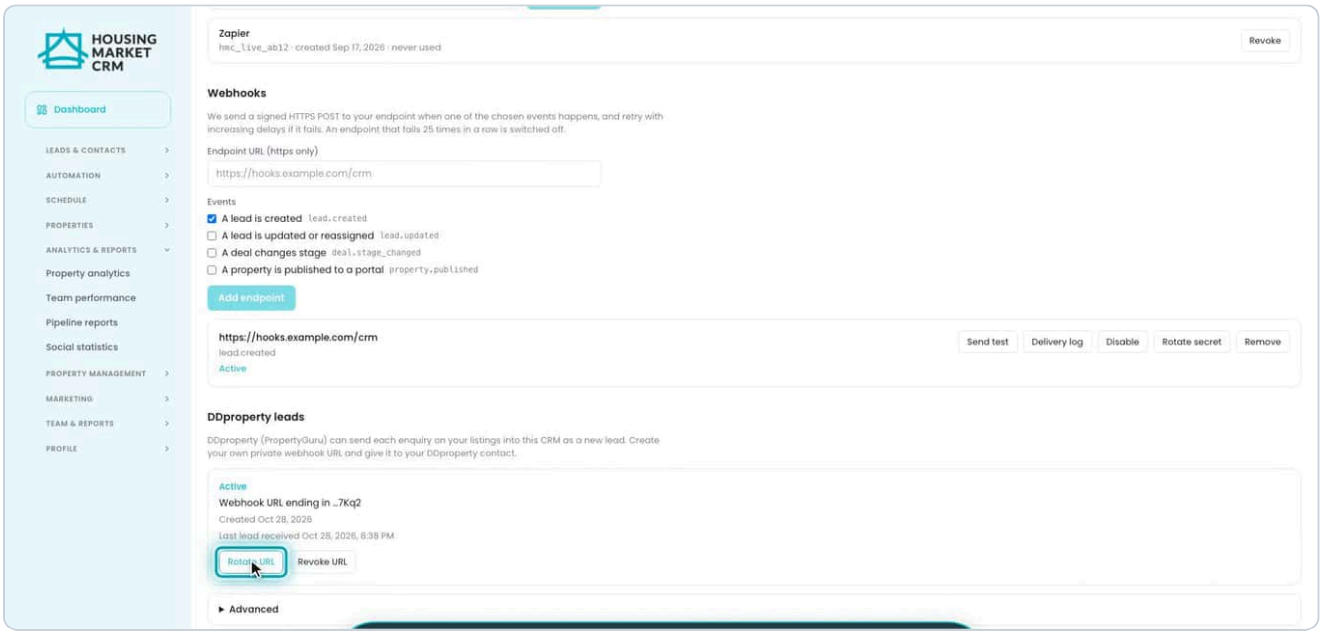


Figure 175.12 · Screen recorded 28 October 2026

13 Revoke stops new leads. Leads you already have stay.

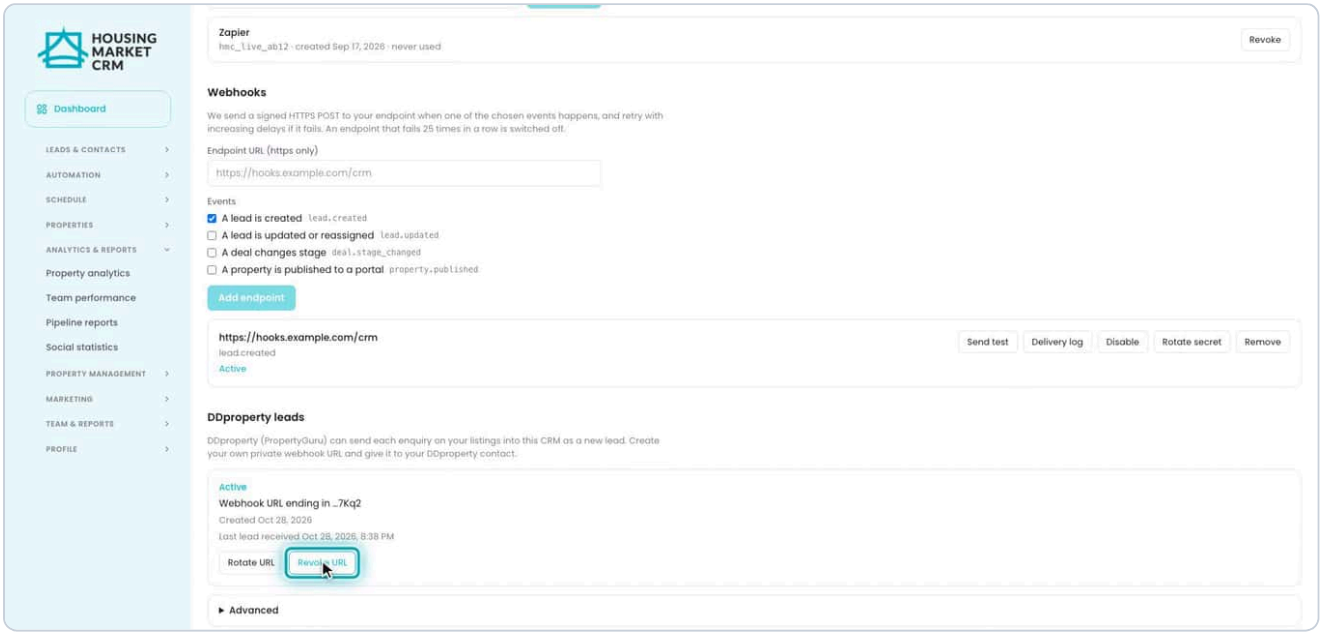


Figure 175.13 · Screen recorded 28 October 2026

14 DDproperty leads are part of Business.

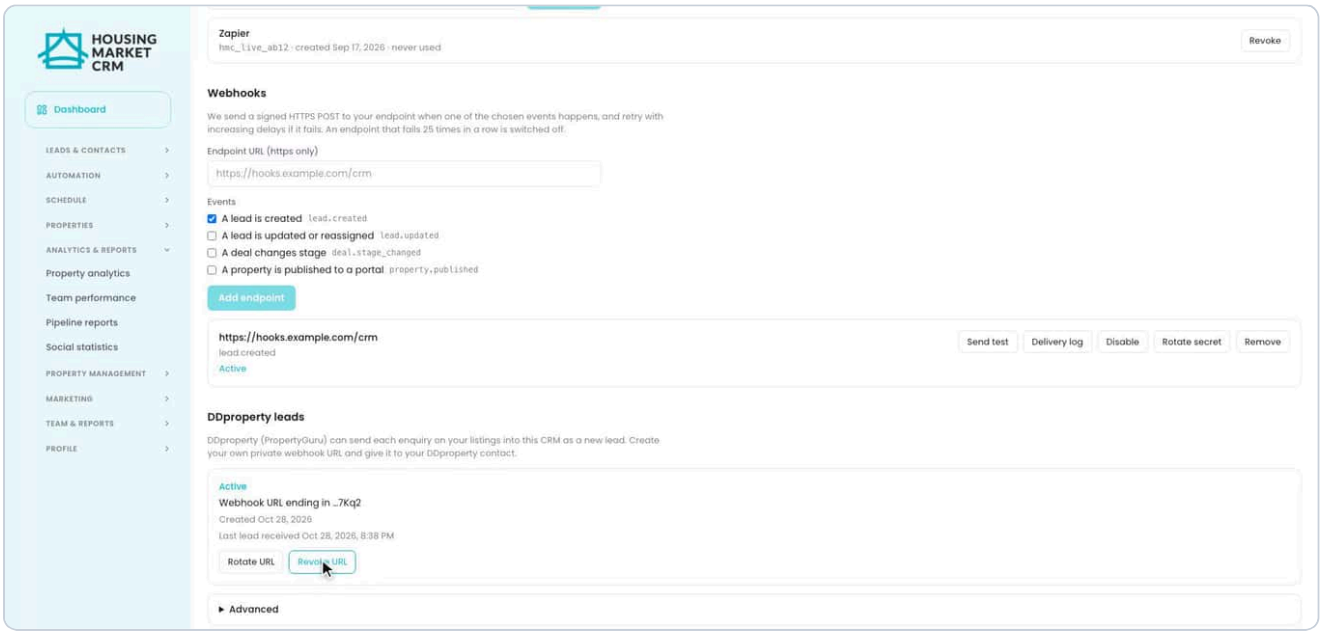


Figure 175.14 · Screen recorded 28 October 2026

GOOD TO KNOW

NOTE

If you advertise on DDproperty (PropertyGuru), the CRM can receive each enquiry on your listings as a new lead, with the details the enquirer gave and the listing it was about. It is part of the Business plan.

Help Center: What is DDproperty lead import in Housing Market CRM?

RELATED HELP CENTER ARTICLES

What happens to a DDproperty enquiry in Housing Market CRM?	faq.housingmarketgroup.com/faq/what-happens-to-a-ddproperty-enquiry-in-housing-market-crm

176 CHAPTER 176

Promote a listing with Ads in two clicks

All plans | For agents | Watch the video

OVERVIEW

Open a live listing in the CRM and choose Promote with Housing Market Ads. You choose a daily budget and the campaign is made from the listing.

The button is on every listing that is published on a portal, on every plan. It appears only when Housing Market Ads is connected to your CRM. The one decision is the daily budget, and the page shows the smallest budget allowed.

The banners and the text are made from the listing, and so is the area around it when the listing has a map pin. The campaign goes to Housing Market for review and is shown once it is approved.

You need a Housing Market Ads account with a card saved, and money in your Ads balance. The page shows your balance and links to the top-up, and tells you when the balance is low for a day at your budget. Nothing is paid through the CRM. You can pause the campaign at any time, and its spend, impressions, clicks and enquiries appear under Ads in the CRM.

The button makes a campaign in the same way as the Ads campaign wizard, with the same checks. The wizard itself, with its own targeting options, is part of Pro.

From the Help Center: **How does the Promote with Housing Market Ads button work?**

STEP BY STEP

1 Open **My properties** in Housing Market CRM.

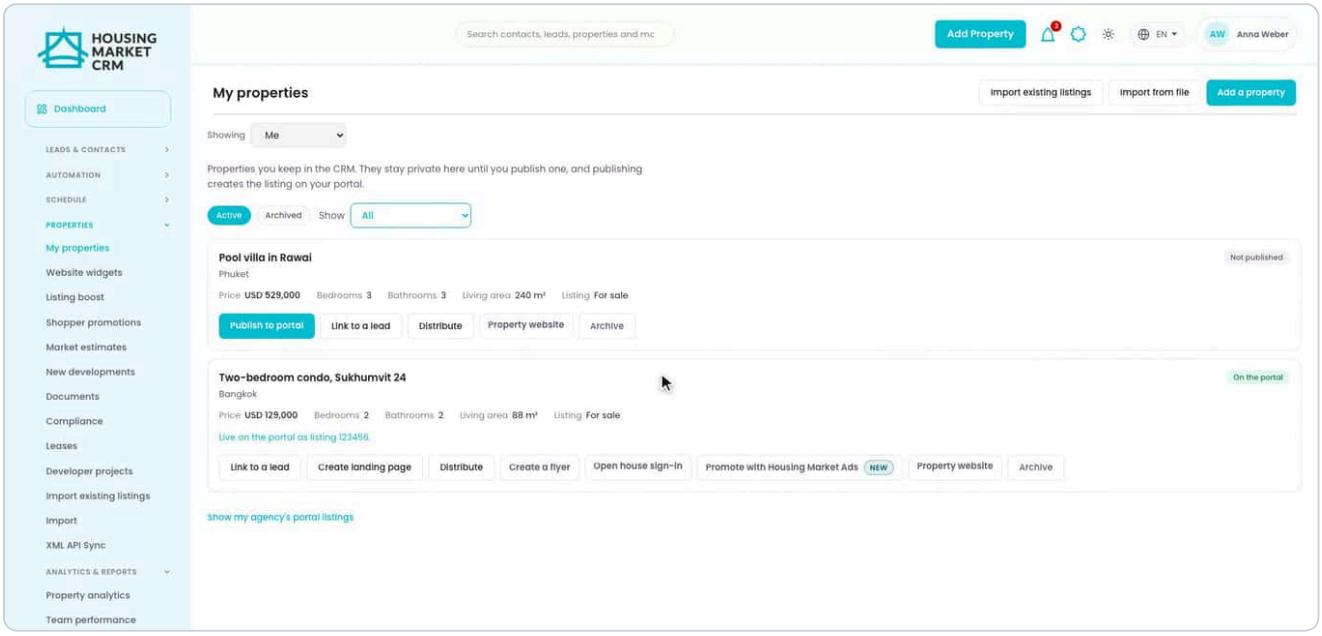


Figure 176.1 · Screen recorded 4 November 2026

2 The button is for listings that are **live on the portal**.

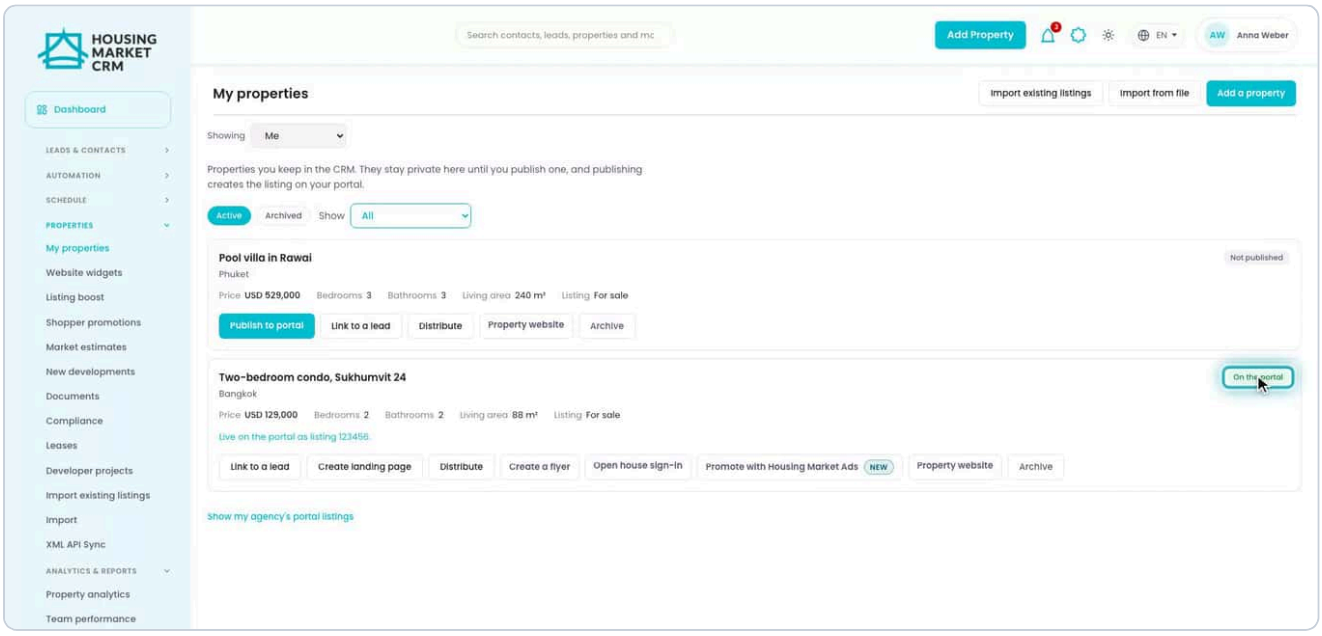


Figure 176.2 · Screen recorded 4 November 2026

3 Click **Promote with Housing Market Ads**.

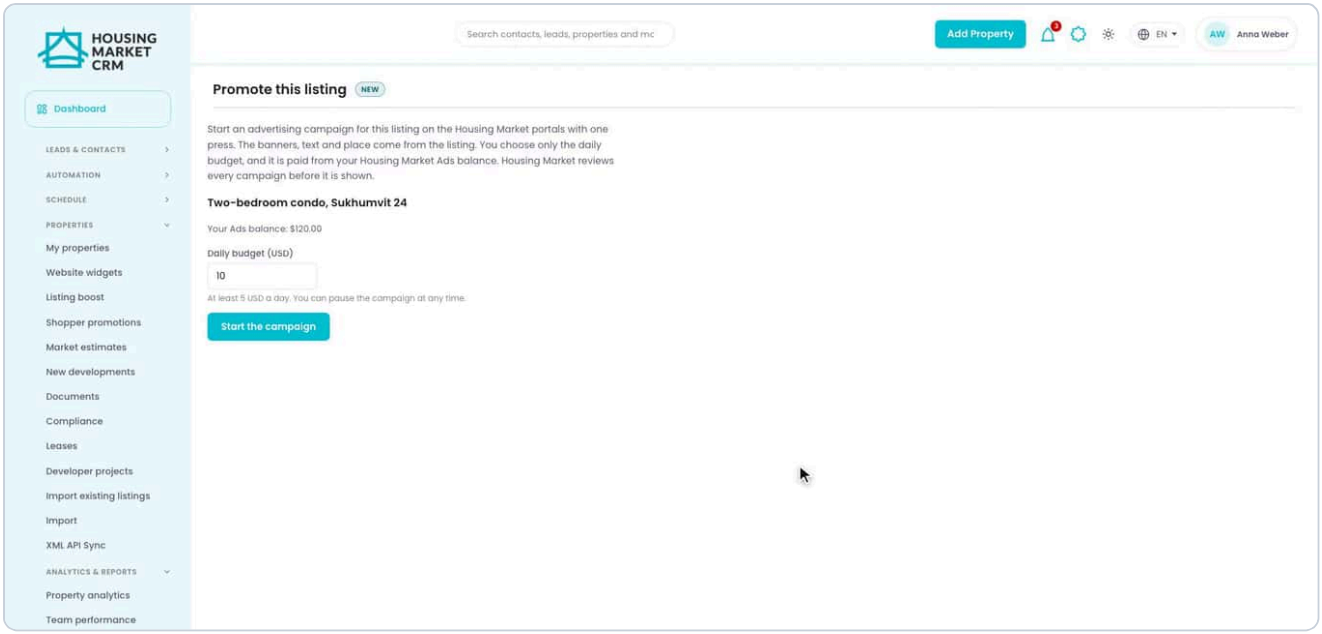


Figure 176.3 · Screen recorded 4 November 2026

4 One press starts an **advertising campaign** for this listing on the portals.

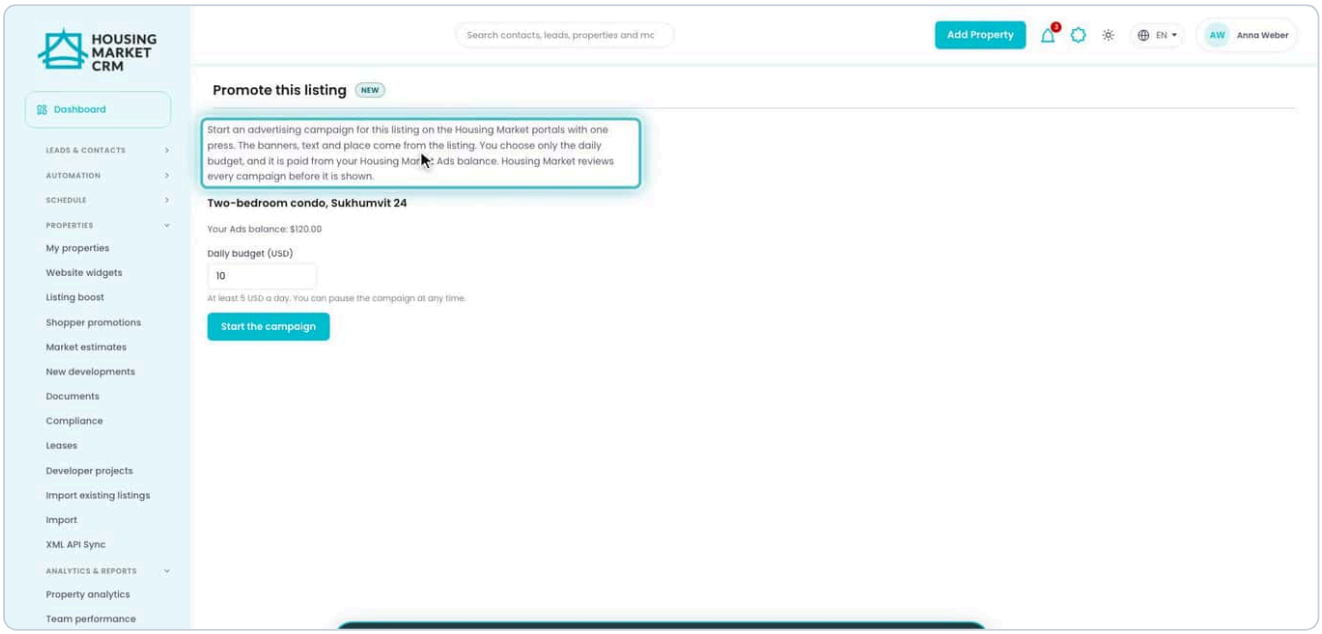


Figure 176.4 · Screen recorded 4 November 2026

5 The **banners, text and place** are made from the listing for you.

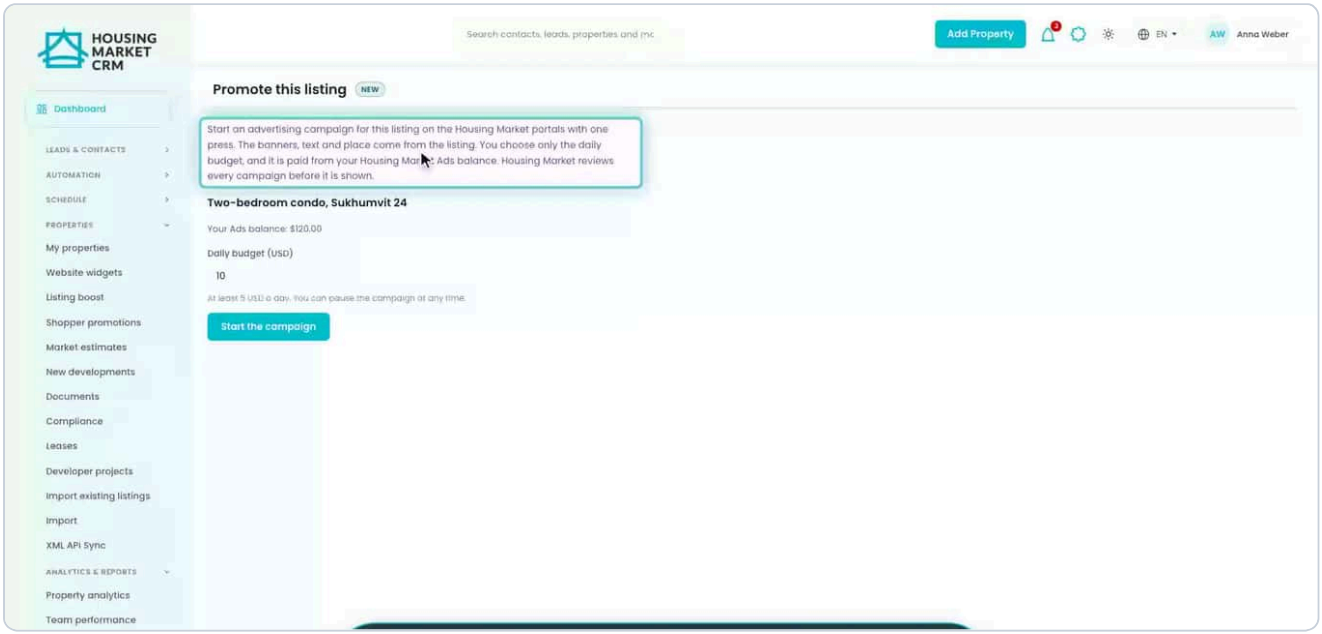


Figure 176.5 · Screen recorded 4 November 2026

6 You choose only the **daily budget**.

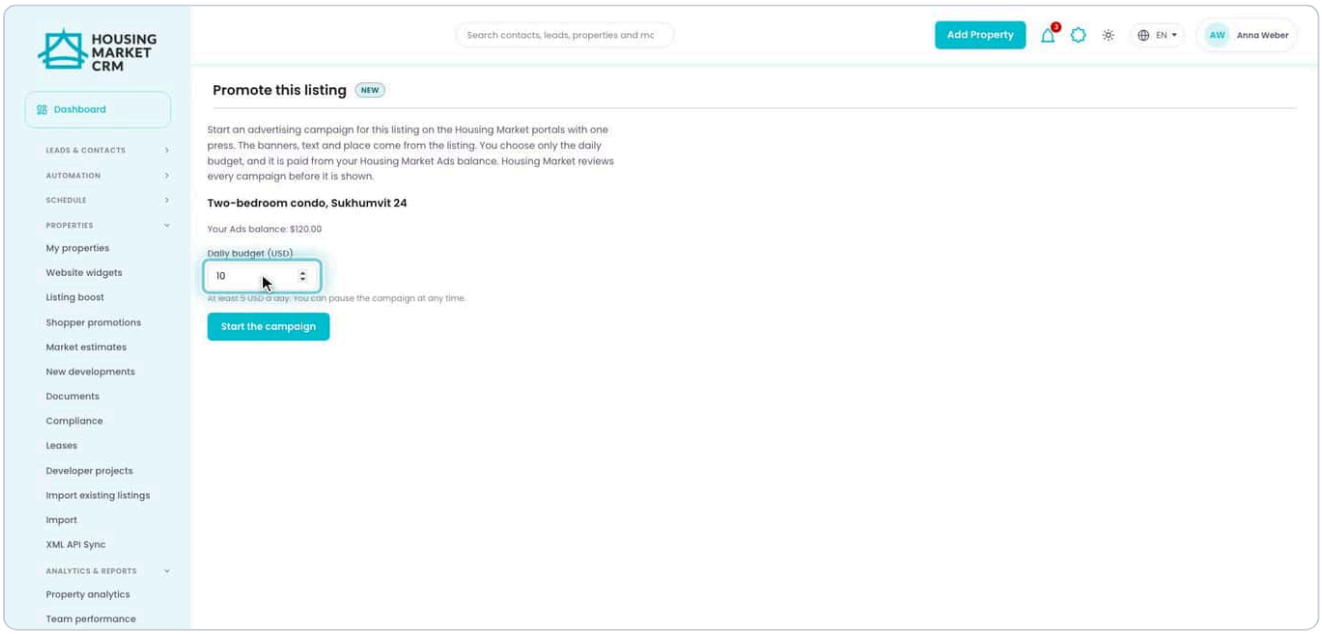


Figure 176.6 · Screen recorded 4 November 2026

7 It is paid from your own **Housing Market Ads balance**.

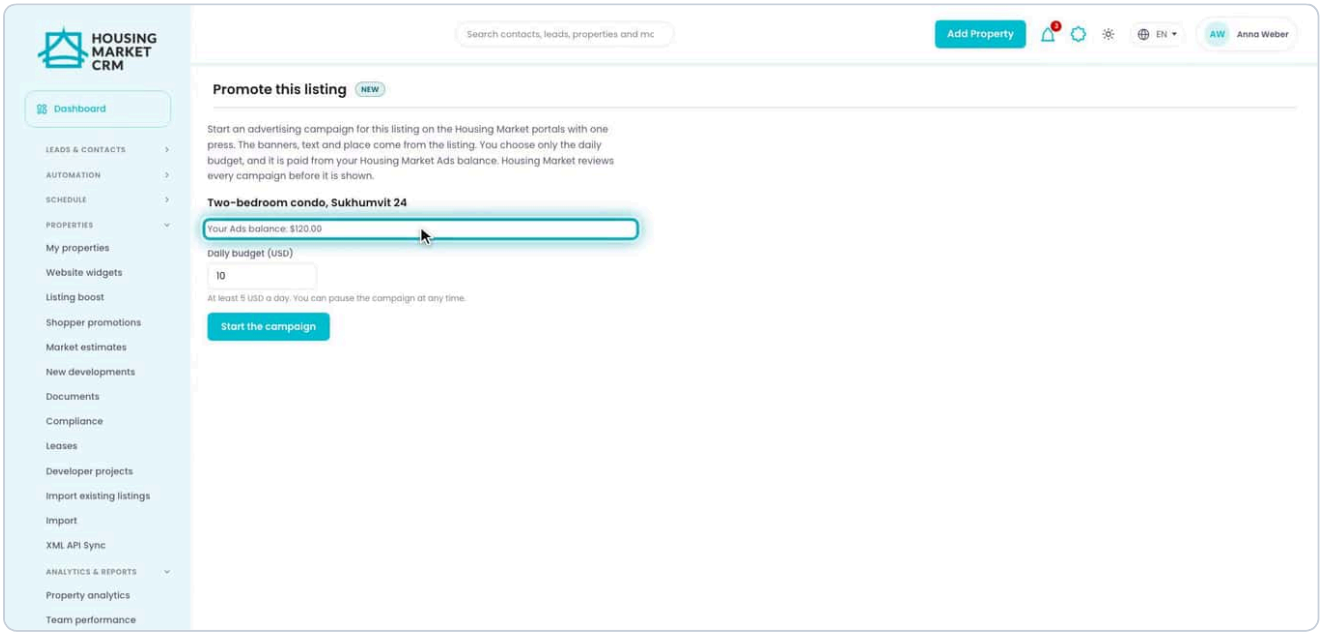


Figure 176.7 · Screen recorded 4 November 2026

8 Nothing is spent until you press **Start the campaign**. We stop here.

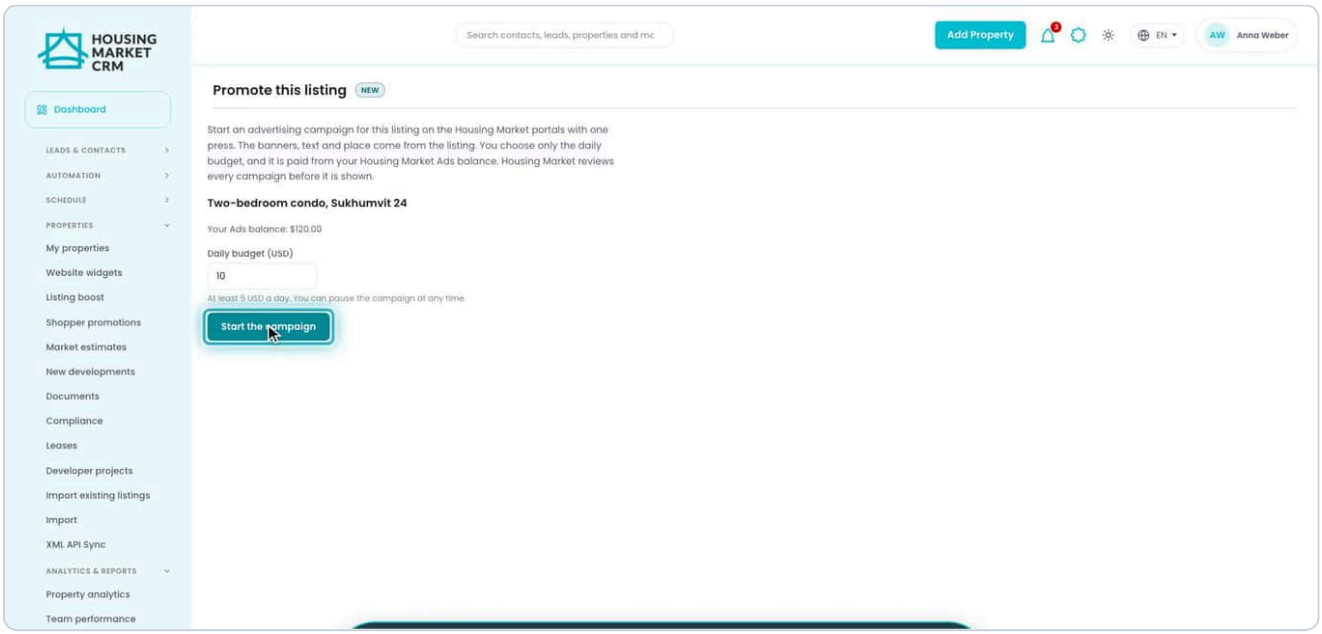


Figure 176.8 · Screen recorded 4 November 2026

9 Housing Market **reviews every campaign** before it is shown, and you can **pause** it at any time.

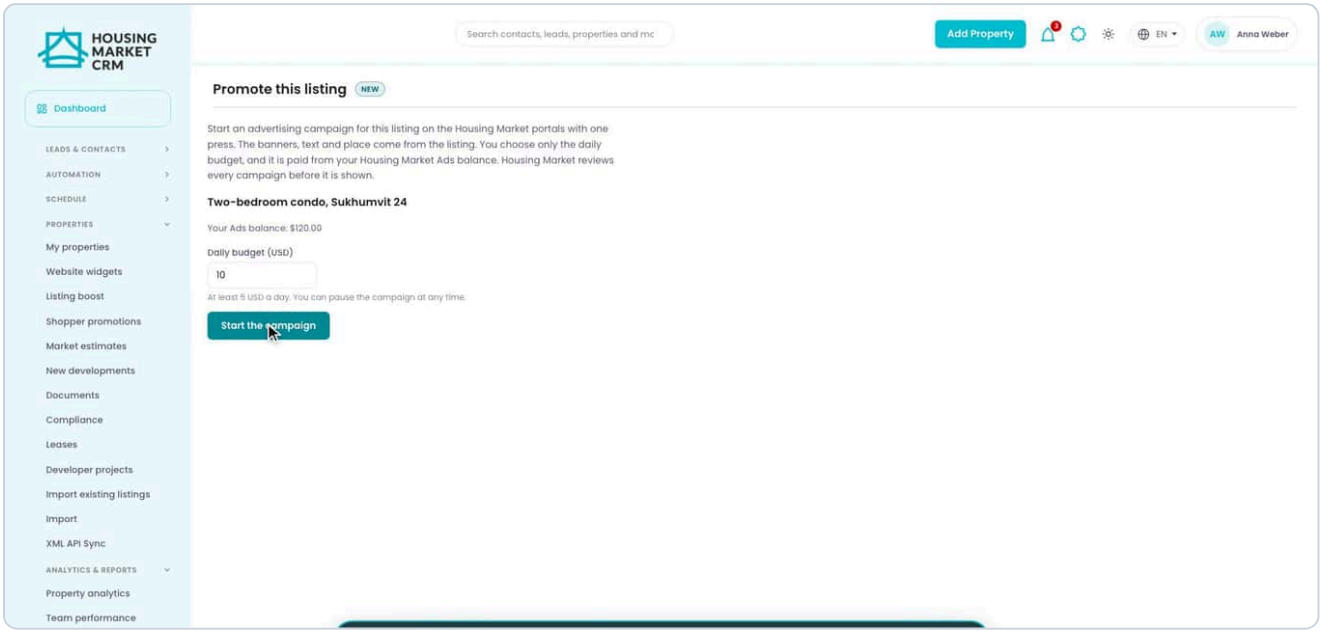


Figure 176.9 · Screen recorded 4 November 2026

10 Its results appear in your CRM under **Ads**.

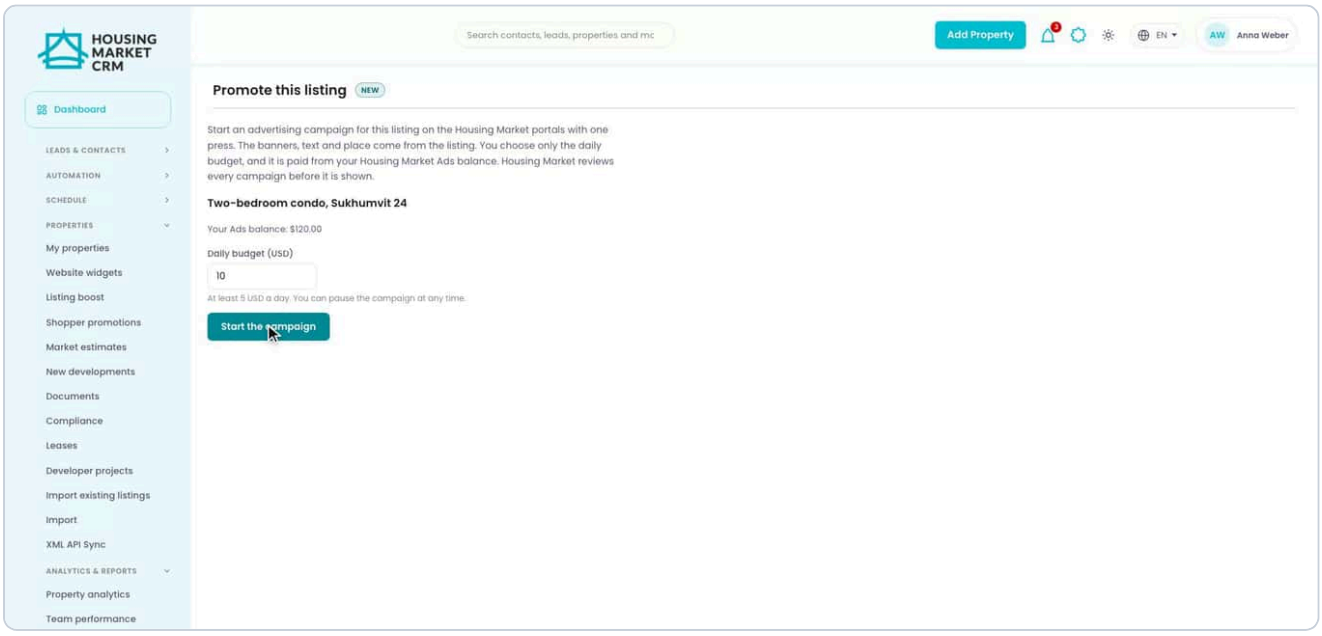


Figure 176.10 · Screen recorded 4 November 2026

RELATED HELP CENTER ARTICLES

Does the CRM work with Housing Market Ads?	faq.housingmarketgroup.com/faq/does-the-crm-work-with-housing-market-ads
How do I promote a listing to shoppers?	faq.housingmarketgroup.com/faq/how-do-i-promote-a-listing-to-shoppers

Need more help?

Every chapter of this handbook is also a short video, and every explanation in it comes from the Help Center.

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Housing Market CRM Handbook · Edition November 2026

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