

# Auction - Booking a Property Viewing and Updating CRM



This guide provides a step-by-step process for booking property viewings and updating the CRM through the iamsold platform. It ensures that all viewings are accurately recorded and linked to the property, streamlining the management of auction records.

By following this guide, users can enhance their efficiency in handling property viewings and maintain clear communication with potential buyers.



Any viewing added to the property record should be added to the iamsold auction record automatically.

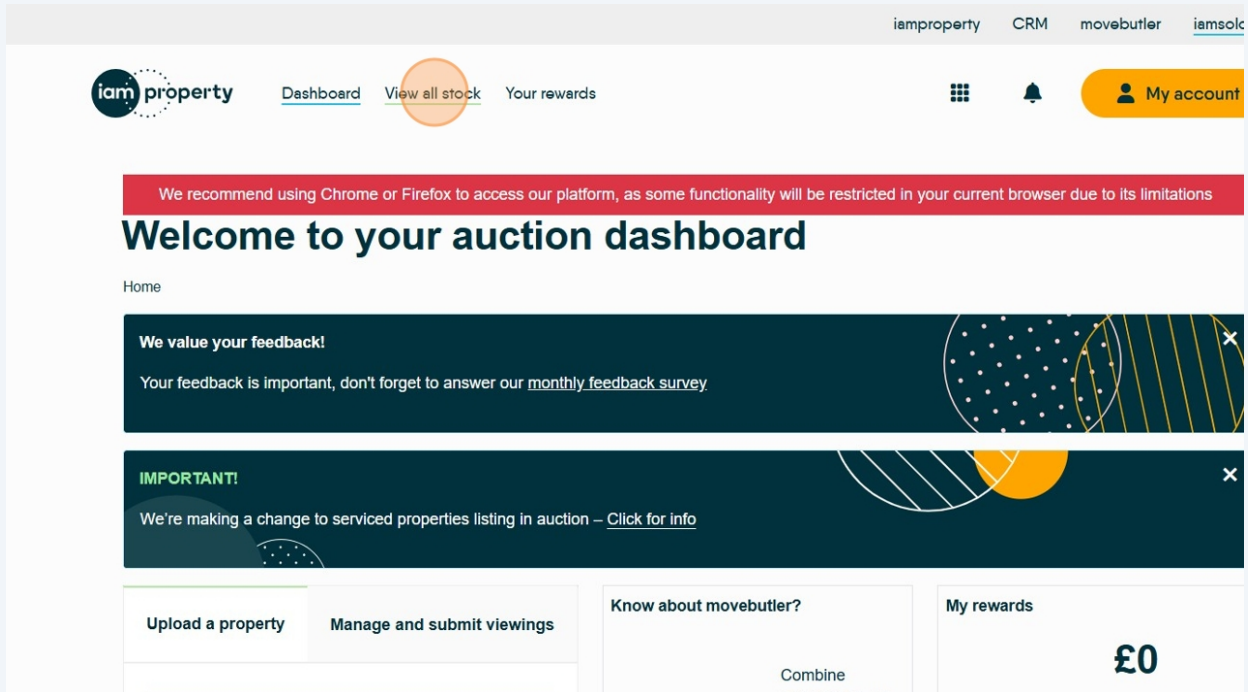
N.B. viewings added to auction DO NOT currently sync back to CRM.

1

Navigate to <https://my.iamproperty.com/ias/property>

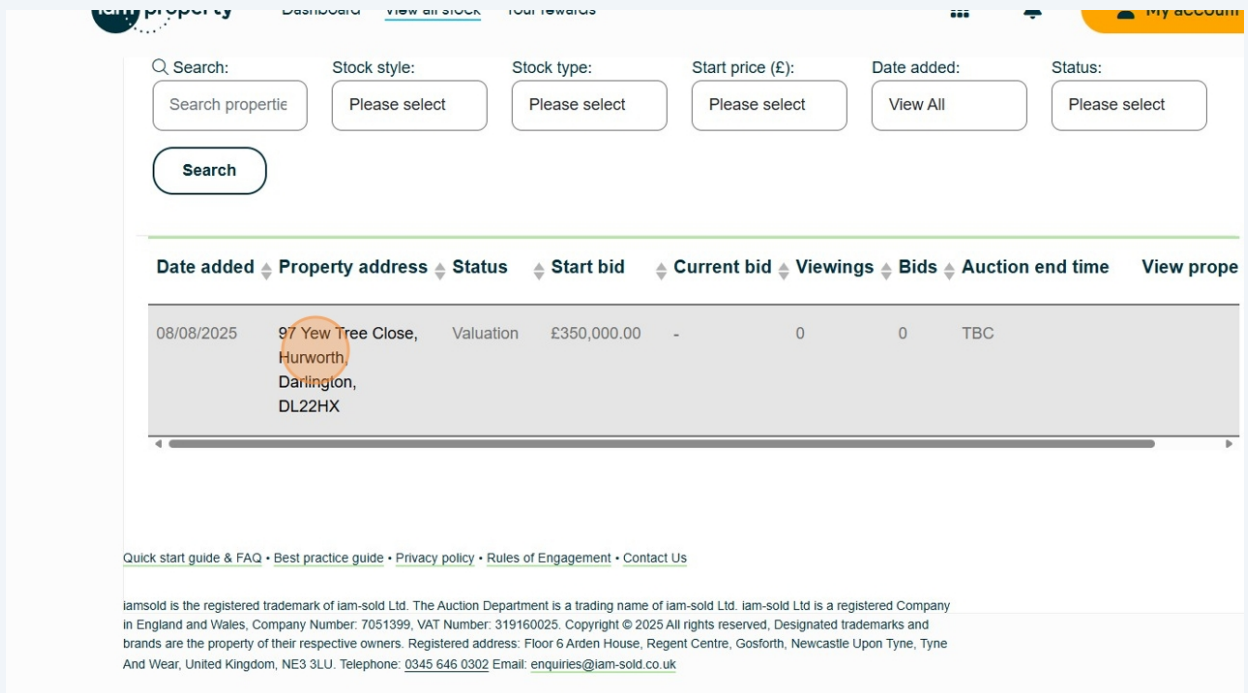
The screenshot shows the 'iam property' auction dashboard. At the top, there's a navigation bar with 'Dashboard', 'View all stock', and 'Your rewards'. A red banner at the top states: 'We recommend using Chrome or Firefox to access our platform, as some functionality will be restricted in your current browser due to its limitations'. Below this, the main heading is 'Welcome to your auction dashboard'. There are two dark blue notification banners: one for a feedback survey and another for a change in serviced properties listing. The dashboard is divided into three main sections: 'Upload a property' with a sub-section 'Manage and submit viewings' containing an 'Add property from CRM' button; 'Know about movebutler?' with a list of services including 'Combine compliance, up front legal prep, and'; and 'My rewards' showing an 'Available balance' of '£0'.

## 2 Click "View all stock"



The screenshot shows the iamproperty dashboard. The top navigation bar includes links for iamproperty, CRM, movebutler, and iam-sold. Below this, the main navigation bar has links for Dashboard, View all stock (highlighted with an orange circle), and Your rewards. A red banner at the top states: "We recommend using Chrome or Firefox to access our platform, as some functionality will be restricted in your current browser due to its limitations". The main heading is "Welcome to your auction dashboard". Below this, there are two dark blue banners: one for feedback ("We value your feedback! Your feedback is important, don't forget to answer our [monthly feedback survey](#).") and another for an important update ("IMPORTANT! We're making a change to serviced properties listing in auction – [Click for info](#)"). The bottom section contains four cards: "Upload a property", "Manage and submit viewings", "Know about movebutler?", and "My rewards" (showing £0). A "Combine" button is also visible.

## 3 Click on the property you are creating the viewing for.



The screenshot shows the iamproperty dashboard with the "View all stock" link highlighted in the top navigation bar. Below the navigation bar, there is a search section with filters for Search, Stock style, Stock type, Start price (£), Date added, and Status. A "Search" button is also present. Below the search section, there is a table of properties. The first row of the table is highlighted, showing the property "97 Yew Tree Close, Hurworth, Darlington, DL22HX". The table has columns for Date added, Property address, Status, Start bid, Current bid, Viewings, Bids, Auction end time, and View property.

| Date added | Property address                                | Status    | Start bid   | Current bid | Viewings | Bids | Auction end time | View property |
|------------|---|-----------|-------------|-------------|----------|------|------------------|---------------|
| 08/08/2025 | 97 Yew Tree Close, Hurworth, Darlington, DL22HX | Valuation | £350,000.00 | -           | 0        | 0    | TBC              |               |

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This field will show if the property is linked to CRM and the property ID, clicking the ID number will take you to the property record in CRM.

The screenshot shows the 'property' dashboard. At the top, there's a navigation bar with 'property', 'Dashboard', 'View all stock', and 'Your rewards'. On the right, there are icons for a grid, a bell, and a 'My account' button. The main content area features a large placeholder for a property image labeled 'Awaiting Image'. To the right of the image, there's a sidebar with 'Vendors: Mrs Pamela Green', 'Style: House Type: Detached', 'Referrer: Dave Morgan', 'Rewards recipient: Dave Morgan will be awarded up to £50.00 for this property.', and 'Linked to CRM? Yes - 10326114' with an external link icon. The 'Viewings' and 'Bids' counts are both 0. Below this, there's a green bar showing 'Starting bid: £350,000.00' and 'Current bid: Not available'. Two orange buttons are present: 'Submit and manage viewings' and 'Upload vendor certified ID'. At the bottom, there's a tabbed interface with 'Property notes (0)', 'Auctioneer's comments', 'Auction Pack', and 'Bid history'.

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Click "Submit and manage viewings"

This screenshot is identical to the one above, showing the 'property' dashboard. The 'Submit and manage viewings' button is highlighted with an orange circle, indicating the action to be taken. The rest of the interface, including the navigation bar, property details, and tabs, remains the same.

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Click the "Date \*" field and add the viewing date, either use the date picker or overtype the date field.

We recommend using Chrome or Firefox to access our platform, as some functionality will be restricted in your current browser due to its limitations

## Manage viewings

HOME / VIEWALL STOCK / VIEW PROPERTY / Manage viewings

97 Yew Tree Close  
Darlington  
DL22HX

Viewing date & time

Date \*

Time \*

View property details [↗](#) [↗](#)

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Click the "Time \*" field and add the viewing time, either use the date picker or overtype the date field.

We recommend using Chrome or Firefox to access our platform, as some functionality will be restricted in your current browser due to its limitations

## Manage viewings

HOME / VIEWALL STOCK / VIEW PROPERTY / Manage viewings

97 Yew Tree Close  
Darlington  
DL22HX

Viewing date & time

Date \*

Time \*

View property details [↗](#) [↗](#)

Add in the Applicant details. Complete these as accurately and completely as possible.

97 Yew Tree Close  
Darlington  
DL22HX

Viewing date & time

Date \*  
09/08/2025

Time \*  
10:00

View property details

Add new applicant details

Title \*  
Mr

First name \*

Surname \*

Mobile \*

Telephone

Email address \*

Postcode \*  
Postcode search  
or enter address manually

Additional info  
Type some information here

property

Dashboardview all stockTour rewards

my account

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# Manage viewings

HOME / VIEW ALL STOCK / VIEW PROPERTY / Manage viewings

97 Yew Tree Close  
Darlington  
DL22HX

Viewing date & time

Date \*  
09/08/2025

Time \*  
10:00

View property details

Add new applicant details

Title \*  
Mr

First name \*

Surname \*

Mobile \*

Telephone

Email address \*

Postcode \*  
Postcode search  
or enter address manually

Additional info  
Type some information here

property

Dashboardview all stockTour rewards

my account

We recommend using Chrome or Firefox to access our platform, as some functionality will be restricted in your current browser due to its limitations

## Manage viewings

HOME / VIEW ALL STOCK / VIEW PROPERTY / Manage viewings

17 Yew Tree Close  
Arlington  
DL22HX

Viewing date & time

Date \*

09/08/2025

Time \*

10:00

View property details [↗](#) [↗](#)

Add new applicant details

Title \*

Mr

First name \*

David

Surname \*

Morgan

Mobile \*

07885464639

Telephone

Email address \*

Postcode \*

DL22HX

12 Yew Tree Close, County Durham

14 Yew Tree Close, County Durham

15 Yew Tree Close, County Durham

16 Yew Tree Close, County Durham



Dashboard

View all stock

Your rewards



My account

View property details [↗](#) [↗](#)

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Yew Tree Close

Hurworth

City \*

Darlington

Postcode \*

DL2 2HX

Additional info

Type some information here

☐ Request a pre-viewing call?

Just before you proceed, please tick the boxes to confirm the following:

- ☐ That the viewer is aware that their information will be shared with iamsold, and that they are happy for us to contact them in relation to this viewing \*
- ☐ That the viewer is aware that calls to and from iamsold are recorded for training and monitoring purposes \*



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Click "Request a pre-viewing call?" if a pre-viewing call to the viewer is required.

View property details [↗](#) [↗](#)

16 Yew Tree Close Hurworth

City \* Postcode \*

Darlington DL2 2HX

Additional info

Testing for CRM Trainers knowledge base.

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☐ That the viewer is aware that calls to and from iamsold are recorded for training and monitoring purposes \*

Upload Viewing

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Click the "That the viewer is aware that their information will be shared with iamsold, and that they are happy for us to contact them in relation to this viewing \*" field.

View property details [↗](#) [↗](#)

16 Yew Tree Close Hurworth

City \* Postcode \*

Darlington DL2 2HX

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☐ That the viewer is aware that calls to and from iamsold are recorded for training and monitoring purposes \*

Upload Viewing

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Click the "That the viewer is aware that calls to and from iamsold are recorded for training and monitoring purposes \*" field.

[View property details](#)

16

Yew Tree Close

Hurworth

City \*

Postcode \*

Darlington

DL2 2HX

Additional info

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Upload Viewing

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Click "Upload Viewing"

[View property details](#)

16

Yew Tree Close

Hurworth

City \*

Postcode \*

Darlington

DL2 2HX

Additional info

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Upload Viewing