

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.

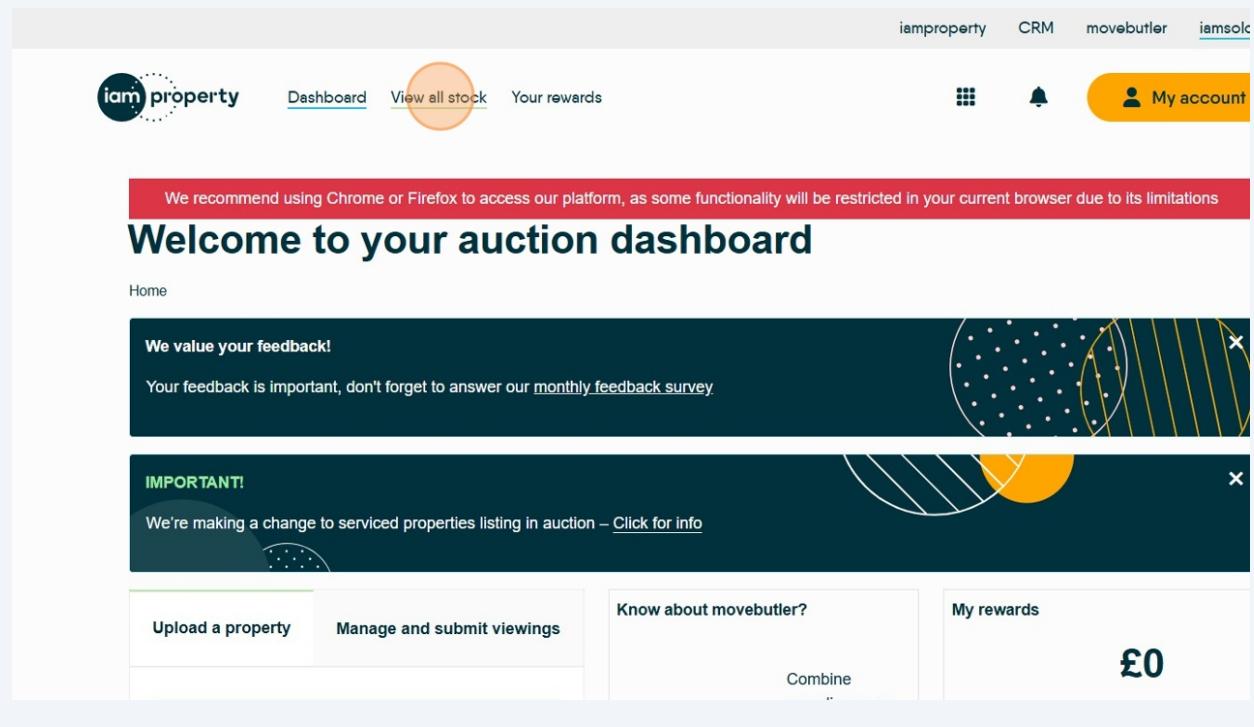
N.B. viewings added to auction DO NOT currently sync back to CRM.

1

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

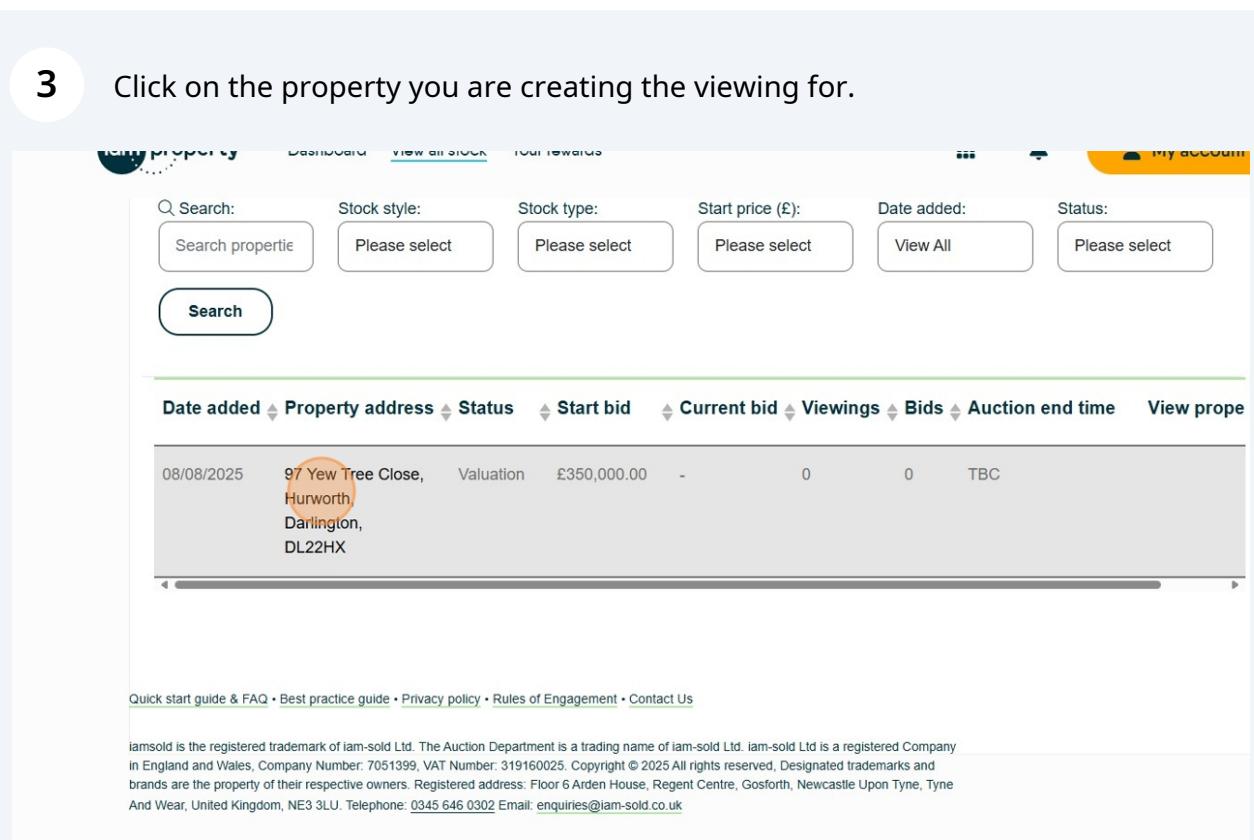
The screenshot shows the iamsold auction dashboard. At the top, there is a navigation bar with the 'iam property' logo, 'Dashboard', 'View all stock', 'Your rewards', and a 'My account' button. A red banner at the top of the dashboard recommends using Chrome or Firefox. Below the banner, the main title 'Welcome to your auction dashboard' is displayed. The dashboard features several cards: one for feedback (encouraging users to take a monthly survey), one for an important update about serviced properties, and one for uploading a property. The 'Manage and submit viewings' section is also visible. On the right, there is a 'My rewards' section showing a balance of £0 and an available balance of £0.

2 Click "View all stock"



The screenshot shows the iamproperty auction dashboard. At the top, there are navigation links: 'iamproperty', 'CRM', 'movebutler', and 'iamsold'. Below the navigation is a header with the 'iam property' logo, 'Dashboard', 'View all stock' (which is highlighted with a red oval), and 'Your rewards'. To the right of the header are icons for a grid, a bell, and 'My account'. A red banner at the top of the main content area reads: '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 the banner, the main title 'Welcome to your auction dashboard' is displayed. A dark blue sidebar on the left contains a 'We value your feedback!' message and an 'IMPORTANT!' message about changes to serviced properties listing in auction. The main content area features three buttons: 'Upload a property', 'Manage and submit viewings', 'Know about movebutler?', and 'My rewards' (which shows £0). The 'View all stock' button is located in the 'Manage and submit viewings' section.

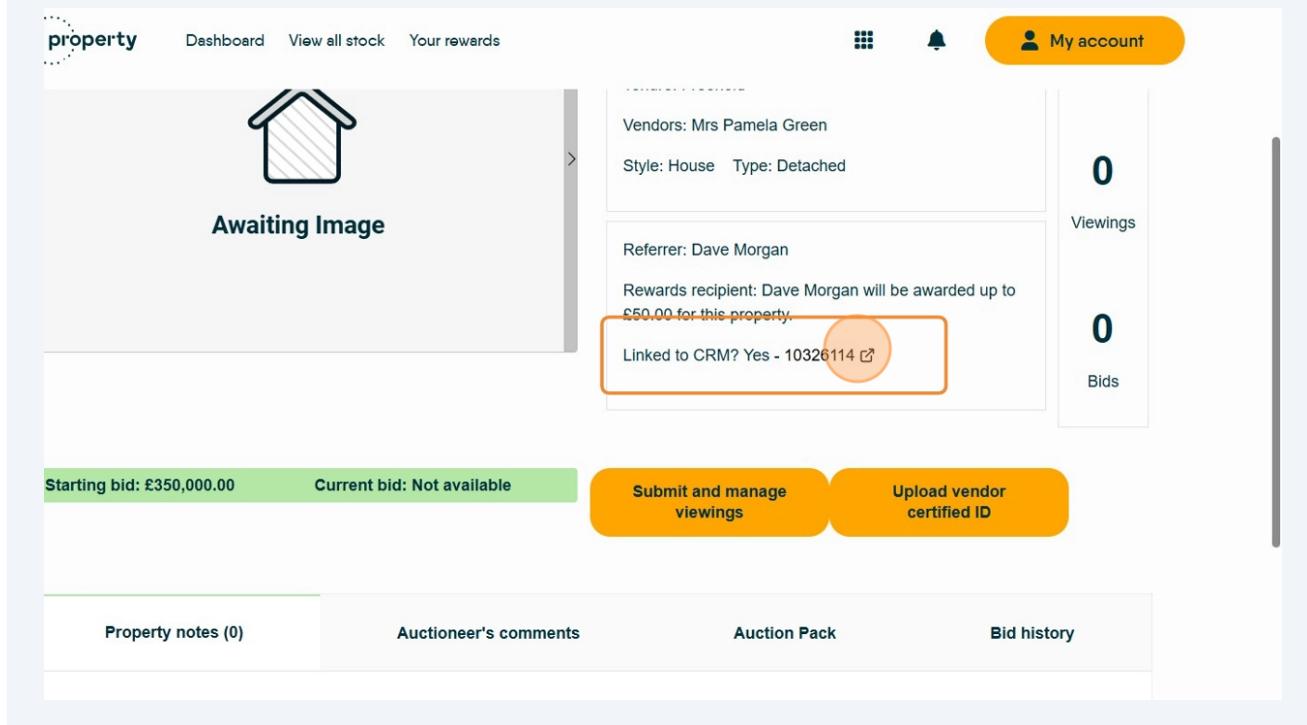
3 Click on the property you are creating the viewing for.



The screenshot shows the 'View all stock' page. At the top, there is a search bar with fields for 'Search', 'Stock style', 'Stock type', 'Start price (£)', 'Date added', and 'Status', each with a 'Please select' placeholder. Below the search bar is a 'Search' button. The main content area displays a table of properties. The first row shows a property listed as follows: Date added (08/08/2025), Property address (97 Yew Tree Close, Hurworth, Darlington, DL22HX), Valuation (£350,000.00), Start bid (-), Current bid (0), Viewings (0), Bids (0), Auction end time (TBC), and a 'View property' link. The property address '97 Yew Tree Close, Hurworth, Darlington, DL22HX' is highlighted with a red oval. At the bottom of the page, there are links for 'Quick start guide & FAQ', 'Best practice guide', 'Privacy policy', 'Rules of Engagement', and 'Contact Us'. A small note at the bottom states: 'iamsold is the registered trademark of iam-sold Ltd. The Auction Department is a trading name of iam-sold Ltd. iam-sold Ltd is a registered Company in England and Wales, Company Number: 7051399, VAT Number: 319160025. Copyright © 2025 All rights reserved. Designated trademarks and brands are the property of their respective owners. Registered address: Floor 6 Arden House, Regent Centre, Gosforth, Newcastle Upon Tyne, Tyne And Wear, United Kingdom, NE3 3LU. Telephone: 0345 646 0302 Email: enquiries@iam-sold.co.uk'.

4

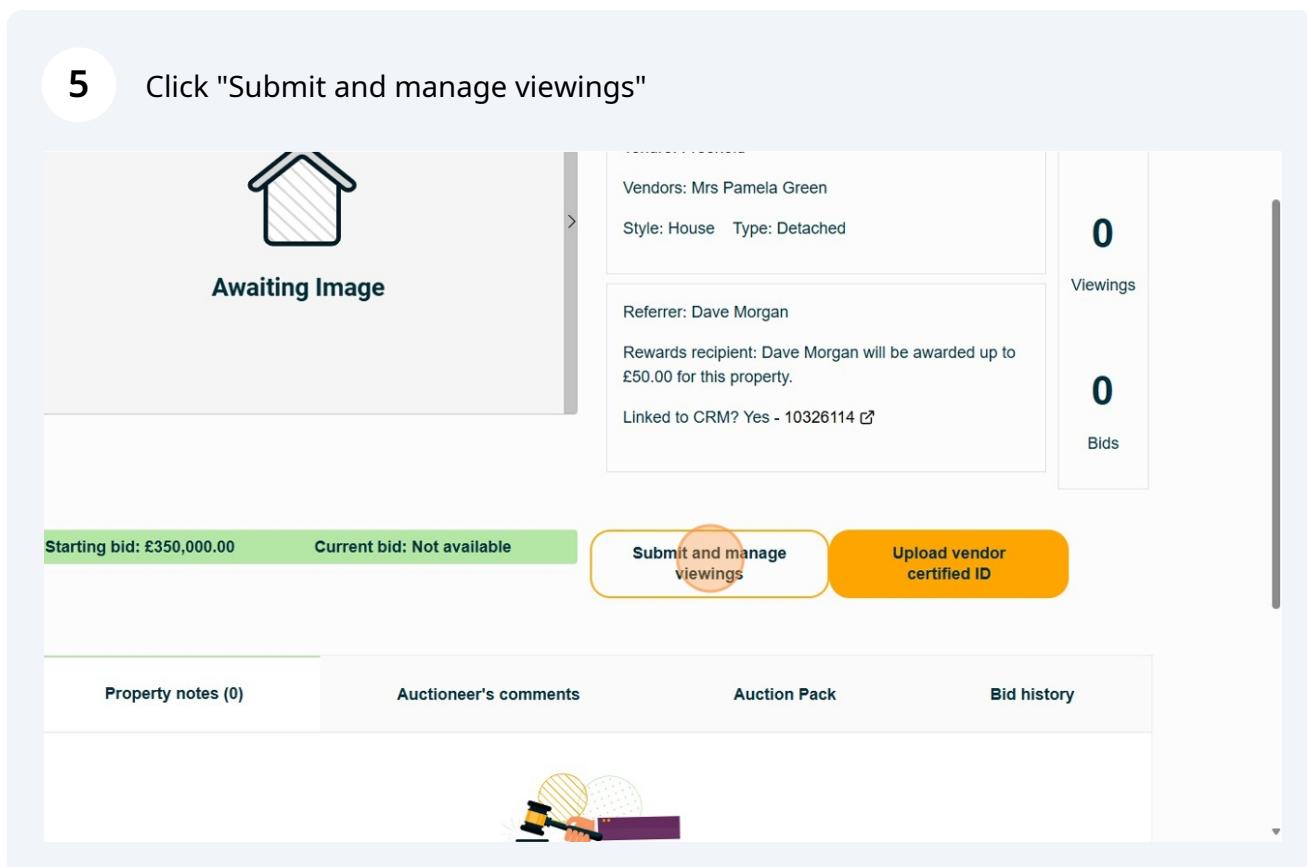
This field will show if the property is linked to CRM and the property ID, clicking the ID number will take you to the property record in CRM.



The screenshot shows a property listing interface. At the top, there is a navigation bar with 'property', 'Dashboard', 'View all stock', 'Your rewards', and 'My account' (with a notification icon). Below the navigation, there is a placeholder image icon with the text 'Awaiting Image'. To the right of the image, property details are listed: '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 a box containing 'Linked to CRM? Yes - 10326114' with a link icon, which is highlighted with an orange oval. To the right of the details, there are two boxes: 'Viewings' (0) and 'Bids' (0). At the bottom, there are buttons for 'Starting bid: £350,000.00', 'Current bid: Not available', 'Submit and manage viewings' (which is highlighted with an orange oval), 'Upload vendor certified ID', 'Property notes (0)', 'Auctioneer's comments', 'Auction Pack', and 'Bid history'.

5

Click "Submit and manage viewings"



The screenshot shows the same property listing interface as the previous one, but with a focus on the 'Submit and manage viewings' button. This button is highlighted with an orange oval. The rest of the interface remains the same, including the placeholder image, property details, and other buttons at the bottom.

6 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 / VIEW ALL STOCK / VIEW PROPERTY / Manage viewings

97 Yew Tree Close
Darlington
DL22HX

Viewing date & time

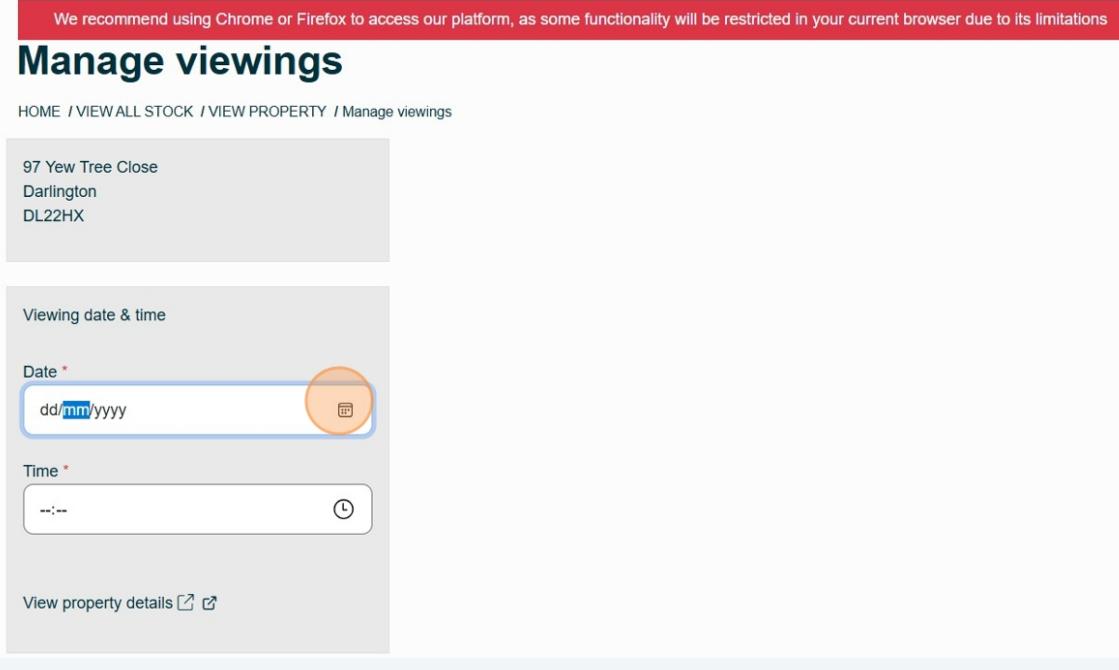
Date *

dd/mm/yyyy

Time *

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View property details  



7 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 / VIEW ALL STOCK / VIEW PROPERTY / Manage viewings

97 Yew Tree Close
Darlington
DL22HX

Viewing date & time

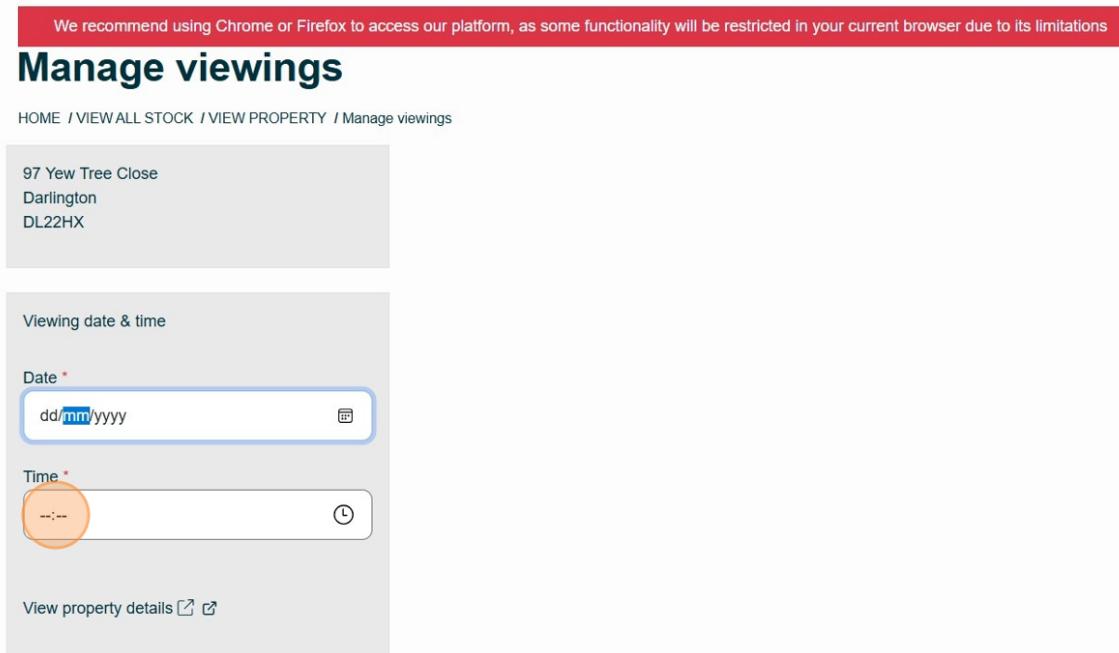
Date *

dd/mm/yyyy

Time *

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View property details  



8

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

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Manage viewings

HOME / VIEW ALL STOCK / VIEW PROPERTY / Manage viewings

97 Yew Tree Close Darlington DL22HX	Add new applicant details		
Viewing date & time	Title *	First name *	Surname *
Date *	Mr		
09/08/2025	Mobile *	Telephone	Email address *
Time *			
10:00	Postcode *	Postcode search	
	or enter address manually		
	Additional info		
	Type some information here		

PROPERTY Dashboard VIEW ALL STOCK TOUR REWARDS    

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

97 Yew Tree Close Darlington DL22HX	Add new applicant details		
Viewing date & time	Title *	First name *	Surname *
Date *	Mr	First name	Surname
09/08/2025	Mobile *	Telephone	Email address *
Time *			
10:00	Postcode *	Postcode search	
	or enter address manually		
	Additional info		
	Type some information here		

PROPERTY Dashboard VIEW ALL STOCK TOUR REWARDS    

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

7 Yew Tree Close
arlington
L22HX

Viewing date & time

Date *

09/08/2025

Time *

10:00

View property details  

Add new applicant details

Title * First name * Surname *

Mr David Morgan

Mobile * Telephone Email address *

07885464639

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  

16 Yew Tree Close Hurworth

City * Postcode *

Darlington DL2 2HX

Additional info

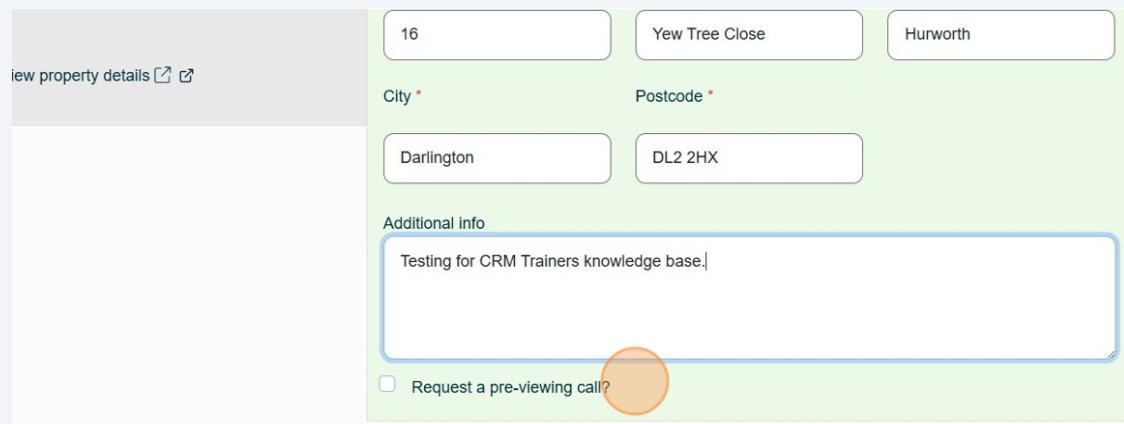
Type some information here

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 *

9 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.

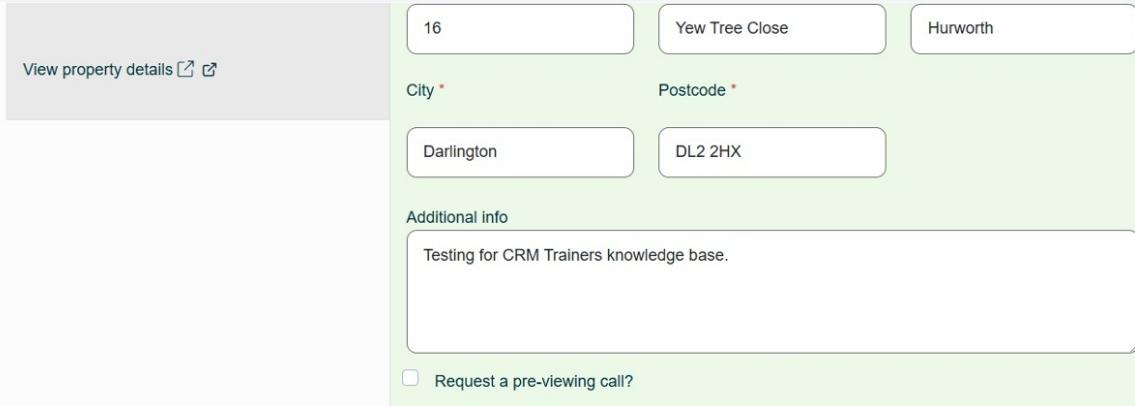
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- That the viewer is aware that calls to and from iamsold are recorded for training and monitoring purposes *

Upload Viewing

10 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	

Additional info

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Upload Viewing

11

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

Testing for CRM Trainers knowledge base.

Request a pre-viewing call?

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

Upload Viewing

12

Click "Upload Viewing"

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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Upload Viewing