

Referring a Property for Auction in iamproperty CRM



Learn how to navigate your CRM dashboard to identify suitable properties and refer them for auction. This guide walks you through verifying vendor details and finalising the referral submission process to streamline your workflow.

There are 2 ways a property is identified as a potential for Auction, from the My Day screen and from the property record.



Within CRM there are now Auction Triggers that will identify if a property would be suitable for Auction, these triggers give you guidance where the property has been on the market for longer than expected, had no offers etc. This indicators give you the opportunity to speak with the Vendor and discuss the option of Auction, also other options based on viewer feedback etc.

From My Day screen

1 Navigate to <https://crm.iamproperty.com/MyDay> and scroll down the screen.

The screenshot displays the 'My Day' dashboard in the iamproperty CRM. At the top, there is a navigation menu with options like 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A user profile button labeled 'My account' is on the right. The main heading reads 'Welcome back, Training'. Below this, there are three action buttons: '+ Add New Record', 'View property management', and 'Visit help centre'. A search bar is located below the buttons with the placeholder text 'Search all records'. The dashboard is divided into two main sections: 'Today's events' and 'My tasks'. The 'Today's events' section shows a table with two rows: '08:00 Jemmas 8-4.30' and '12:00 Test test'. The 'My tasks' section shows a table with four rows of tasks, all with a status of 'Not Started' and a priority of 'High'. The tasks are: 'Call Audrey' (due 08/Oct/2025), 'test' (due 24/Oct/2025), 'Visit' (due 28/Oct/2025), and 'title' (due 29/Oct/2025).

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At the bottom of the My Day screen is this **"Potentially suitable for auction"** section.

The screenshot shows the 'My Day' screen in the 'iam property' system. At the top, there is a navigation bar with 'iam property' logo, 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications' menus. A 'My account' button is on the right. Below the navigation bar, there is a task card for 'contact vendor for elton' with a status of 'Not Started', priority 'High', and due dates '19/Nov/2025'. Below this, there are 'View calendar' and 'View all tasks' buttons.

The main section is titled 'Potentially suitable for auction' and contains a table with the following data:

Property address	No. of triggers met	No. of days advertised	Last viewing added	Last offer added	Last price reduction	Latest offer fallen through	Withdrawal from market	Contract expires	
× 7553 Pelaw Crescent,...	▲ 2 triggers	146	-	-	23/01/26	-	-	12/03/26	Refer to auction
× 1 Kings Court Ryders Wynd,...	▲ 1 trigger	1215	22/12/22	-	-	-	-	-	Refer to auction
× 8 Carlton Moor Crescent,...	▲ 1 trigger	271	-	-	-	-	-	-	Refer to auction
∨ 63 Woodland	▲ 1 trigger	346	01/08/24	-	-	-	09/05/25	-	Refer to auction



Alert! Even though the property is 'For Sale' with your agency, it is still a requirement that you contact the Vendor to discuss using Auction, explain the process and for their permission to send the details to the Auction Specialists.

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To edit the Auction Triggers that are visible on screen, click here. In the menu, select the options you want visible and save.

The screenshot shows a web application interface with a navigation bar at the top containing 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. Below this is a task list with a task titled 'contact vendor for elton' due on 19/Nov/2025. A 'View all tasks' button is visible. Below the task list is a table titled 'Potentially suitable for auction'. The table has columns for 'Property address', 'No. of triggers met', 'No. of days advertised', 'Last viewing added', 'Last offer added', 'Last price reduction', 'Latest offer fallen through', and 'Withdrawal from market'. A menu is open over the table, showing a list of columns with checkboxes: 'Property address', 'No. of triggers met', 'No. of days advertised', 'Last viewing added', 'Last offer added', 'Last price reduction', 'Latest offer fallen through', and 'Withdrawal from market'. The 'No. of triggers met' checkbox is highlighted with an orange circle. 'Cancel' and 'Save' buttons are at the bottom of the menu.

Property address	No. of triggers met	No. of days advertised	Last viewing added	Last offer added	Last price reduction	Latest offer fallen through	Withdrawal from market	Contract expires
7553 Pelaw Crescent,...	2 triggers	146	-	-	23/01/26	-	-	12/01/25
1 Kings Court Ryders Wynd,...	1 trigger	1215	22/12/22	-	-	-	-	-
8 Carlton Moor Crescent,...	1 trigger	271	-	-	-	-	-	-
Woodland	1 trigger	346	01/08/24	-	-	-	09/05/25	-

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The 'No. of Triggers Met' option, when hovered over, shows the individual triggers hit to create the auction suggestion.

The screenshot shows the same web application interface as above, but with a tooltip displayed over the '2 triggers' cell for the '7553 Pelaw Crescent' property. The tooltip is titled 'Trigger(s) met:' and lists two triggers: 'Inactivity on 23/01/26' and 'Price reduction on 23/01/26'. The '2 triggers' cell is highlighted with an orange box.

Property address	No. of triggers met	No. of days advertised	Last viewing added	Last offer added
7553 Pelaw Crescent,...	2 triggers	146	-	-
1 Kings Court Ryders Wynd,...	1 trigger	1215	22/12/22	-
8 Carlton Moor Crescent,...	1 trigger	271	-	-

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Scrolling across the screen gives visibility of the Vendor details to enable contact, so a discussion around auction can be had before referring to auction.

calendar

Not Started contact vendor for elton High 19/Nov/2025 19/Nov/2025

< Prev Next >

View all tasks

Partially suitable for auction

Latest offer valid through	Withdrawal from market	Contract expires	Negotiator	Branch	Lead vendor	Lead vendor phone number	Occupier	Date of latest trigger	
-	-	12/03/26	Training Dave	Morgan & Co	Sales Vendor184	07854112121	-	23/01/26	Refer to auction
-	-	-	Training Dave	Morgan & Co	Eve Harmon	07733889944	-	06/10/25	Refer to auction
-	-	-	David-George Morgan	Morgan & Co	Arthur Morgan	07788996666	-	18/12/25	Refer to auction
09/05/25	-	-	David-	Morgan &	Arthur	07788996666	-	23/02/26	Refer to auction

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Click "Refer to auction" to refer the property to the Auction Specialist team who will handle the process from this point onwards.

calendar

Not Started contact vendor for elton High 19/Nov/2025 19/Nov/2025

< Prev Next >

View all tasks

Partially suitable for auction

Latest offer valid through	Withdrawal from market	Contract expires	Negotiator	Branch	Lead vendor	Lead vendor phone number	Occupier	Date of latest trigger	
-	-	12/03/26	Training Dave	Morgan & Co	Sales Vendor184	07854112121	-	23/01/26	Refer to auction
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-	-	-	David-George Morgan	Morgan & Co	Arthur Morgan	07788996666	-	18/12/25	Refer to auction
09/05/25	-	-	David-	Morgan &	Arthur	07788996666	-	23/02/26	Refer to auction

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Once 'Refer to Auction' is clicked this screen will show all the relevant details for the property, taken from CRM. Additional Information can be added to, or edited from the 'Background Information' field. Complete any spaces that are not completed.

The screenshot shows the 'Property details' form in the iam property system. The navigation bar at the top includes 'iam property', 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', 'Communications', and 'My account'. The form contains the following sections:

- Property details:** 7553 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, Bedroom: 3, Bathrooms: 1, Receptions: 1.
- Referrer:** Training Dave (dropdown menu).
- Background information:** Referral type: Asking Price: Default £160000, Property Type: Semi-Detached House, Property Styles: (empty).
- Does the property have an auction contract?** Yes No
- Was the property previously on the market?** Yes No

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Scroll down to "**Lead vendor details**" and add in any missing information. Once complete the 'Refer' option will be available to click and send the property to the Auction Specialists.

The screenshot shows the 'Lead vendor details' form in the iam property system. The form contains the following sections:

- Lead vendor details:** Sales Vendor184, Email: zagg.dave@gmail.com, Mobile: 07854112121, Address: Same as property.
- Is the vendor an organisation?** Yes No
- Title:** (empty text box)
- Forename:** Sales
- Surname:** Vendor184
- Telephone Number:** 07854112121
- Vendor's address is different to the property
- Vendor confirms details can be shared with iamsold.
- Buttons:** Cancel, Refer

From a Property Record

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Click **"Refer Property for Auction"** this is shown on all properties not just those that are suggested.

The screenshot shows a web application interface for property management. At the top, there are navigation links: iamproperty, CRM, movebutler, and iamsold. Below this is a main navigation bar with dropdown menus for Lettings, Sales, Accounts, Reporting, and Communications. On the right side of this bar are icons for a grid, calendar, notifications (with a red '14' badge), search, and a 'My account' button. The main content area has a dark blue header with the property address '3 Pelaw Crescent, Chester le Street, DH2 2HX' and price '£ 160,000'. It also shows '3' bedrooms and '1' bathroom, and an 'Available' status. A 'Lead vendor: Sales Vendor184' is listed with a 'View Vendors' button. A 'Refer Property for Auction' button is highlighted with an orange box. Other buttons include 'Appraisal' and 'WARNING'. Below the header are filters for 'Negotiator Training Dave', 'Branch Morgan & Co', and 'Status For Sale'. The bottom section is divided into 'PROPERTY PICTURES' with an 'Upload' button and 'Property Address' with an 'Edit Address' button and a search field for the postcode 'DH2 2HX'.

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The same screen as previously shown will show. Complete the screen and click the 'Refer' option.

[Go back to property](#) >> [Refer property to auction](#)

Refer property to auction

Property details

7553 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX,
Bedroom: 3 Bathrooms: 1
Receptions: 1

Referrer

Training Dave

Background information

Referral type: Manual
Asking Price: Default £160000
Property Type: Semi-Detached House
Property Styles:

Does the property have an auction contract?



Alert! Once the Property has been accepted for Auction, please make sure you add the Auction notes etc to the properties marketing and re-upload to portals and your website.

Also change any status indicators you use in CRM to show this property is now an auction property.