

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.



Alert! Auction Triggers needs to be enabled for the Account and per user in CRM. Contact crm.support@iamproperty.com to have the feature enabled and either request the feature is switched on for your users, or add the feature in the 'Users' menu in CRM Control Centre.



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. These 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.

iamproperty My day Lettings Sales Accounts Reporting Communications My account

Welcome back, Training

+ Add New Record View property management Visit help centre

Search all records

Today's events

Time	Name
08:00	Jemmas 8-4.30
12:00	Test test

My tasks

Status	Name	Priority	Start date	Due date
Not Started	Call Audrey	High	08/Oct/2025	08/Oct/2025
Not Started	test	High	24/Oct/2025	24/Oct/2025
Not Started	Visit	High	28/Oct/2025	28/Oct/2025
Not Started	title	High	29/Oct/2025	29/Oct/2025

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

iamproperty CRM movebutler iamsold

iamproperty My day Lettings Sales Accounts Reporting Communications My account

Potentially suitable for auction

Showing 1 - 3 of 3

Property address	No. of triggers met	Date of latest trigger	No. of days advertised	Last viewing added	Last offer added	Last price reduction	Latest offer fallen through
7553 Pelaw Crescent, Cheste...	2 triggers	23/01/26	188			23/01/26	
8 Carlton Moor Crescent,...	1 trigger	18/12/25	313				
1 Kings Court Ryders Wynd,...	1 trigger	06/10/25	1257	22/12/22			

2.48.0_20052026.19 | OV1

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CRM

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iamsold

iamproperty

My day

Lettings

Sales

Accounts

Reporting

Communications

My account

View calendar

View all tasks

Potentially suitable for auction

Showing 1 - 3 of 3

Property address

Withdrawal from market

Contract expires

Negotiator

Branch

Lead vendor

Lead vendor phone number

Occupier

7553 Pelaw Crescent, Cheste...

12/03/26

Training Dave

Morgan & Co

Sales Vendor184

07854112121

8 Carlton Moor Crescent,...

David-George Morgan

Morgan & Co

Arthur Morgan

07788996666

1 Kings Court Ryders Wynd,...

Training Dave

Morgan & Co

Eve Harmon

07733889944

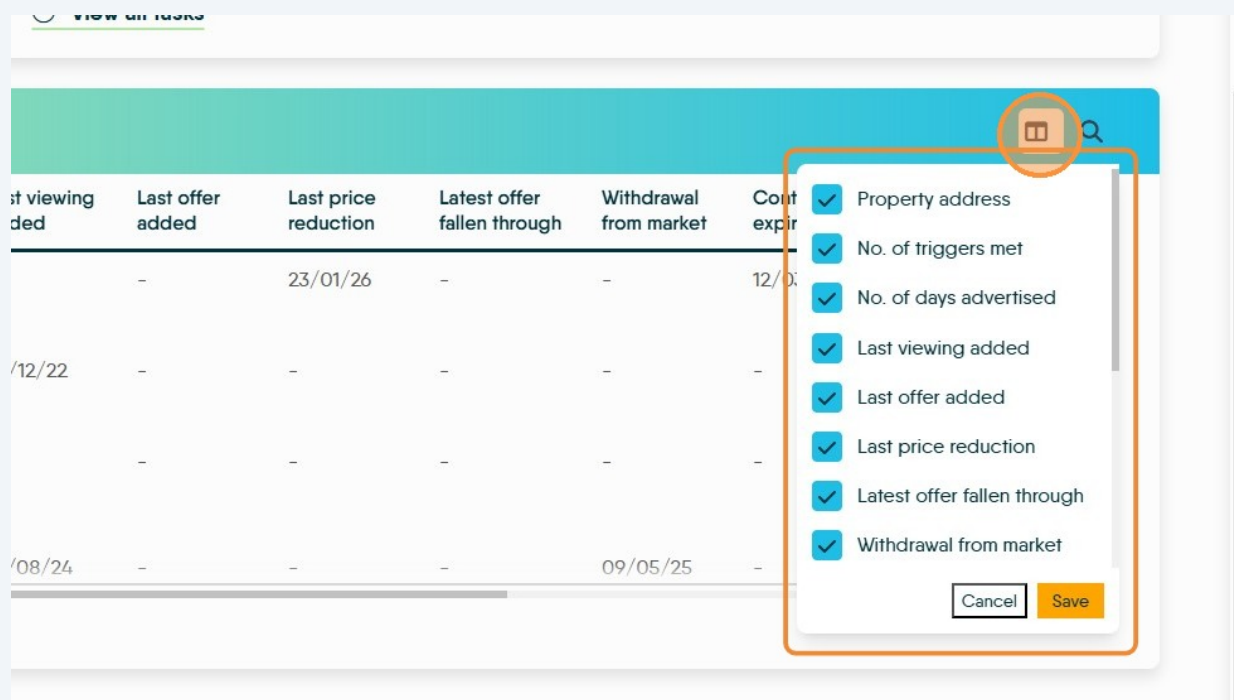
2.48.0_20052026_19 | OV1



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.

3

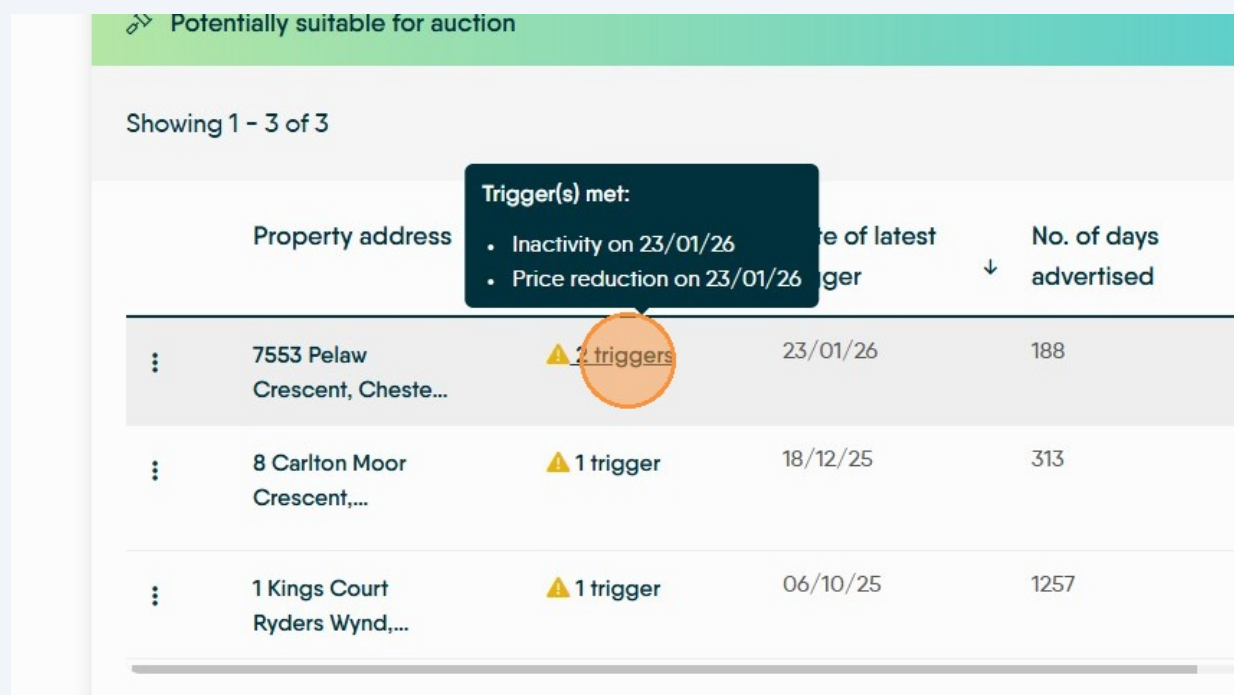
There are a number of auction triggers that cause a property to show in this list, these are shown below. To edit the **Auction Triggers** that control which properties are added to this list, click here. In the menu, select the options you want visible and save.



Property address	Last offer added	Last price reduction	Latest offer fallen through	Withdrawal from market	Count
-	-	23/01/26	-	-	12/01/26
/12/22	-	-	-	-	-
/08/24	-	-	-	09/05/25	-

4

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

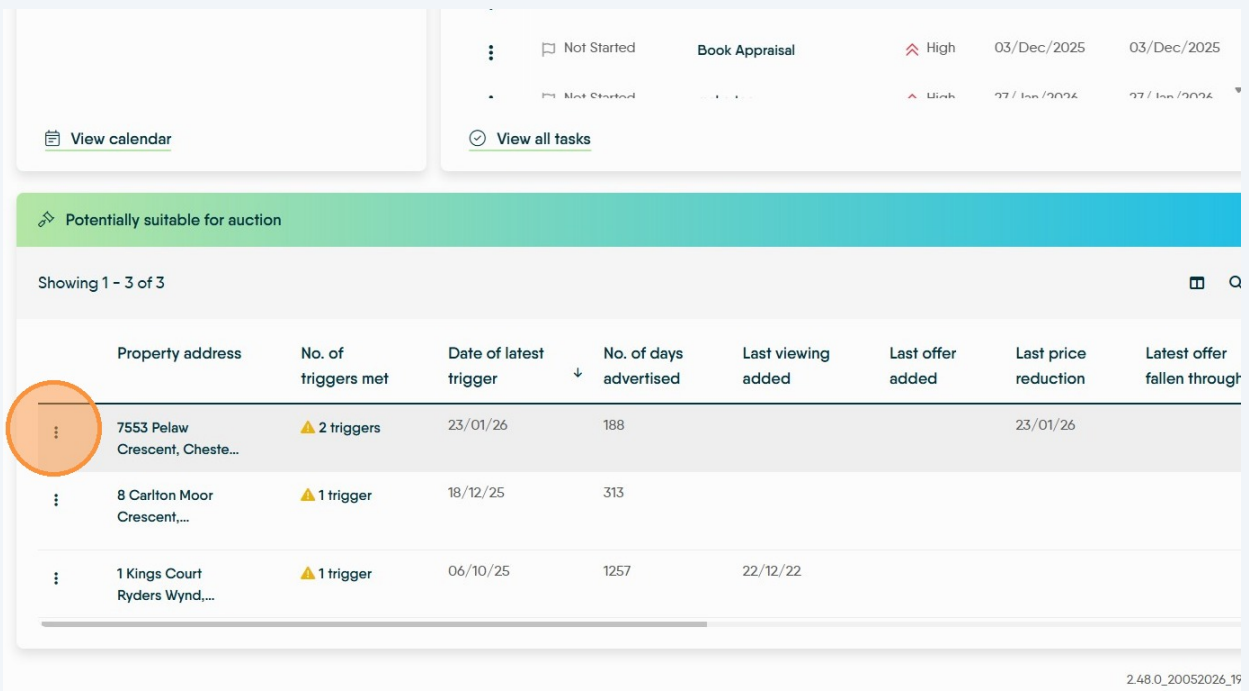


Potentially suitable for auction

Showing 1 - 3 of 3

Property address	No. of latest trigger	No. of days advertised
7553 Pelaw Crescent, Cheshire	2 triggers	188
8 Carlton Moor Crescent, Cheshire	1 trigger	313
1 Kings Court Ryders Wynd, Cheshire	1 trigger	1257

5 Click "3-dot" menu



The screenshot shows a software interface with a table of properties. A red circle highlights the '3-dot' menu icon in the first row of the table. The table has the following columns: Property address, No. of triggers met, Date of latest trigger, No. of days advertised, Last viewing added, Last offer added, Last price reduction, and Latest offer fallen through.

Property address	No. of triggers met	Date of latest trigger	No. of days advertised	Last viewing added	Last offer added	Last price reduction	Latest offer fallen through
7553 Pelaw Crescent, Cheste...	▲ 2 triggers	23/01/26	188			23/01/26	
8 Carlton Moor Crescent,...	▲ 1 trigger	18/12/25	313				
1 Kings Court Ryders Wynd,...	▲ 1 trigger	06/10/25	1257	22/12/22			

Showing 1 - 3 of 3

2.48.0_20052026_19

6 There are a number of options on this menu.

- **"Refer to auction"**
- **"Send email"**
- **"Add task to contact later"**
- **"Send email & add task to contact later"**
- **"Not suitable for auction"**

"Send Email" will send a standard email to the Vendor/Vendors explaining what the auction process is and the key benefits. For the email text click [here](#)

"Add Task to contact later" opens a prefilled Task screen to create a task to remind you to make the call/contact later, by changing the name of the allocated user it can also be allocated to anyone else so they get the task to contact later.

Showing 1 - 3 of 3

	Property address	No. of triggers met	Date of latest trigger	No. of days advertised
	7553 Pelaw Crescent Chester	 2 triggers	23/01/26	188
		 1 trigger	18/12/25	313
		 1 trigger	06/10/25	1257
				
				
				

To:

zagg.dave@gmail.com X

zagg.dave@gmail.com

Bcc:

Subject: Ways to help move your sale forward faster

File Edit View Insert Format Tools Table

      **B** *I* U  System Font 12pt ...

To see how it works and whether it could suit your sale, take a look at our short guide:

{Auction Marketing Material Link}

Or if you'd rather chat it through, just give us a call on {Branch Phone 1} .

Kind regards,

{User Forename} / {Branch Name}

Select Contacts X

 Mr Horace Wimpole
Vendor Solicitor

 Salesetta Vendor235
Vendor

 Sales Vendor235
Vendor

 Salesetta Vendor235
Vendor

£ 150,000

8199 Pelaw Crescent, Chester le Street, DH2 2HX |

Default £ 150,000 | 3 | 1

Available

Lead vendor: Sales Vendor235

View Vendors

Reference

Negotiator Training Dave

Branch Morgan & Co

PROPERTY PICTURES

Upload

Property Address

Postcode DH2 2HX

Address 8199 Pelaw Crescent, Che

Price/Instructed Date

Prefix

High

Medium

Low

Select User Training Dave

Training Dave

david.morgan@iamproperty.com

Title task Auction opportunity - 8199 Pelaw Crescen

Start Date 01/06/2026

Due Date 02/06/2026

Description

Property potentially suitable for auction on 01/0

Primary vendor:

Mobile: 078551234564

Phone: 078551234564

What do you need to do?

Add

Select Record 8199 Pelaw Crescent, Chester le Street

8199 Pelaw Crescent, Chester

7

Once **'Refer to Auction'** is clicked this screen will show displaying 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 fields that are not completed.

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

Does the property have an auction contract?

☐ Yes ☐ No

Was the property previously on the market?

☐ Yes ☐ No

8

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.

Lead vendor details

Sales Vendor184
Email: zagg.dave@gmail.com Mobile: 07854112121
Address: Same as property

Is the vendor an organisation?

☐ Yes ☒ No

Title

Forename

Surname

Telephone Number

☐ Vendor's address is different to the property

☐ Vendor confirms details can be shared with iamsold.

Cancel

Refer

9

"Not suitable for auction" Clicking this will show a "Remove from list and don't remind again?" option, click confirm to stop the property from being suggested in the future.

View calendar

Not Started Book Appraisal High 03/Dec/2025 03/Dec/2025
 Not Started High 27/Jan/2026 27/Jan/2026
 View all tasks

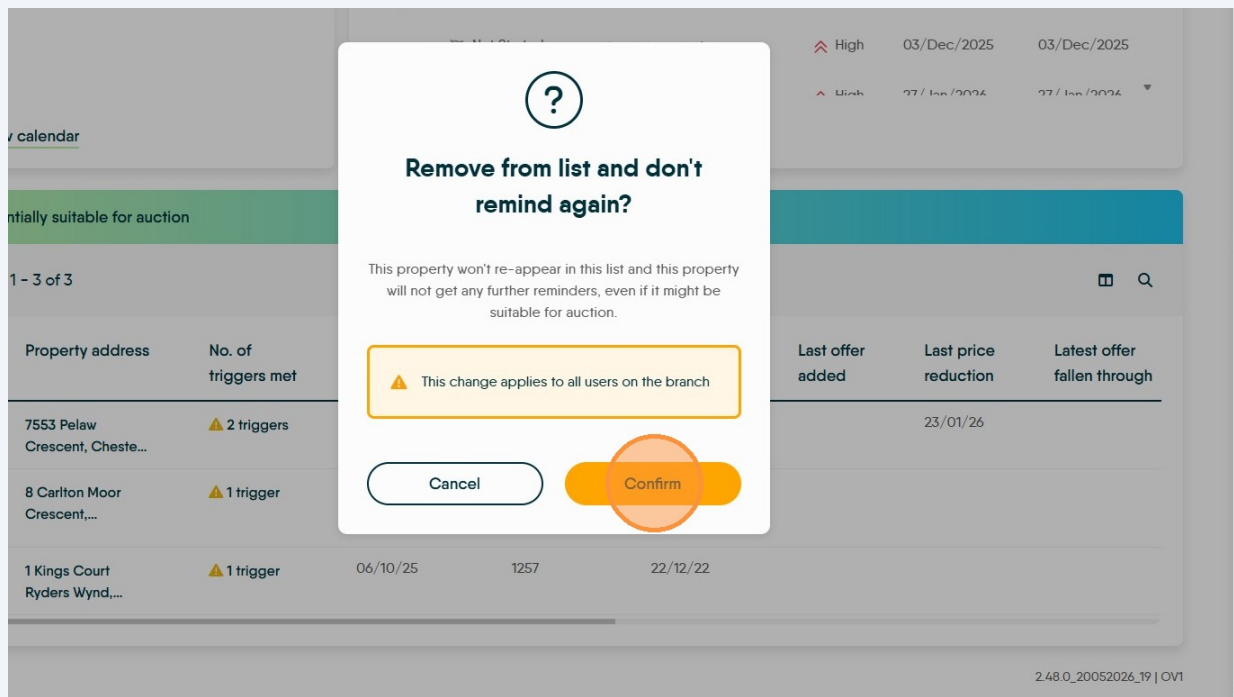
Potentially suitable for auction

Showing 1 - 3 of 3

	Property address	No. of triggers met	Date of latest trigger	No. of days advertised	Last viewing added	Last offer added	Last price reduction	Latest or fallen th
	7553 Pelaw Crescent, Chest...	2 triggers	23/01/26	188			23/01/26	
		1 trigger	18/12/25	313				
		1 trigger	06/10/25	1257	22/12/22			

- Refer to auction
- Send email
- Add task to contact later
- Send email & add task to contact later
- Not suitable for auction

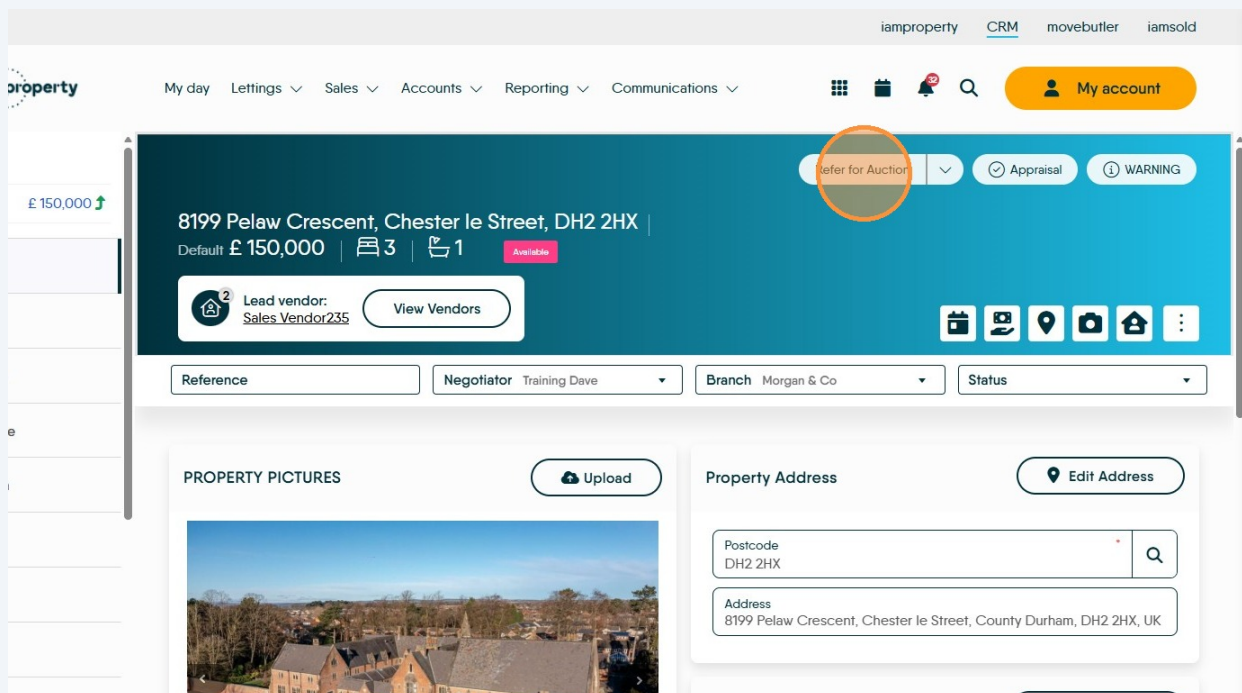
2.48.0_20052



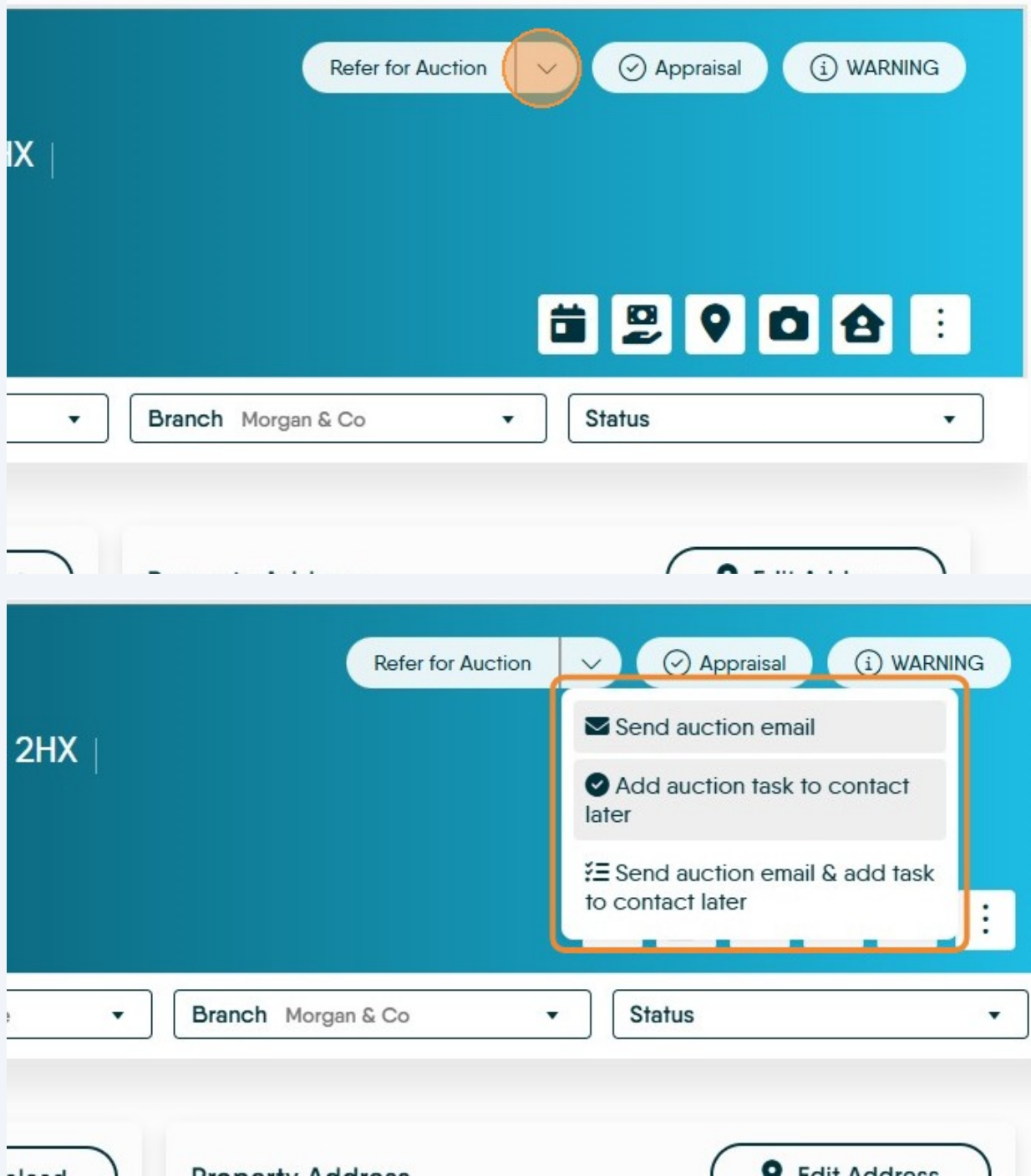
From a Property Record

10

Click **"Refer Property for Auction"** this is shown on all properties not just those that are suggested. To refer the property for Auction click [here](#) to see the process.



11 Click [here](#). Other than 'Refer for Auction' there are 3 other options.



12 Click "Send auction email"

The screenshot shows the iamproperty CRM interface. At the top, there's a navigation bar with 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. A search bar and 'My account' button are on the right. The main content area displays property details for '8199 Pelaw Crescent, Chester le Street, DH2 2HX'. Below this, there's a 'Lead vendor' section with 'Sales Vendor235' and a 'View Vendors' button. A dropdown menu is open, showing three options: 'Send auction email', 'Add auction task to contact later', and 'Send auction email & add task to contact later'. The 'Send auction email' option is highlighted with an orange circle. Below the menu, there are filters for 'Reference', 'Negotiator' (Training Dave), 'Branch' (Morgan & Co), and 'Status'. The bottom section shows 'PROPERTY PICTURES' with an 'Upload' button and 'Property Address' with an 'Edit Address' button. The address field contains 'Postcode: DH2 2HX' and 'Address: 8199 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX, UK'.

13 This will create an email addressed to the **Primary Vendor**, the secondary vendors can be selected if required. As can the Vendor Solicitor. The text is pre set although can be edited on a case by case basis if required. Click send (at bottom of the screen) to send email.

To view the email text click [here](#)

The screenshot shows the email composition screen. The 'To' field is filled with 'zagg.dave@gmail.com'. The 'Subject' is 'Ways to help move your sale forward faster'. The email body contains the following text: 'To see how it works and whether it could suit your sale, take a look at our short guide: {Auction Marketing Material Link}. Or if you'd rather chat it through, just give us a call on {Branch Phone 1}. Kind regards, {User Forename} / {Branch Name}'. On the right, there's a 'Select Contacts' panel with a list of contacts: 'Mr Horace Wimpole Vendor Solicitor' (HW), 'Salesetta Vendor235 Vendor' (SV), 'Sales Vendor235 Vendor' (SV), and 'Salesetta Vendor235 Vendor' (SV). The 'Send' button is at the bottom right.

14

"Add Auction Task to contact later" will create a task to remind you, or whoever is nominated, to contact the Vendor and discuss the Auction opportunity. The task list shows on the 'My Day' page, once the task has reached its start date it will show in the Task List.

By clicking into **'Select User'** the person responsible for contacting the Vendor can be changed, to any user in your branch/company (depending on branch settings). By default it is the person creating the task.

The **'Start'** and **'Due'** dates can be edited and control when the Task shows on screen.

The **'Select Record'** screen shows the detail for the property and has a link to the CRM Property record.

£ 150,000 ↑

8199 Pelaw Crescent, Chester le Street, DH2 2HX |
Default £ 150,000 | 3 | 1 Available

Lead vendor: Sales Vendor235 View Vendors

Reference Negotiator Training Dave Branch Morgan & Co

PROPERTY PICTURES Upload

Property Address

Postcode DH2 2HX

Address 8199 Pelaw Crescent, Che

Price/Instructed Date

Prefix

Mark Task as Completed

High Medium Low

Select User Training Dave

Training Dave david.morgan@iamproperty.com

Title task Auction opportunity - 8199 Pelaw Crescen

Start Date 01/06/2026 Due Date 02/06/2026

Description B I U Property potentially suitable for auction on 01/0

Primary vendor: Mobile: 078551234564 Phone: 078551234564

What do you need to do? Add

Select Record 8199 Pelaw Crescent, Chester le Street

15

"Send auction email & add task to contact later" is merge of both of the other options, sending both the email and creating the task.

Refer Property to Auction

16

Click **"Refer Property to Auction"** on any screen and this is the screen you will come to.

Property Details are the first screen.

Ensure that all screens are correctly completed and all options marked with a red star are completed.

If the information in CRM is correct it will be copied over to here.

Refer property to auction

Property details

8199 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX

Bedrooms: 3 Bathrooms: 1 Receptions: 2

Referrer *

Training Dave



Background information *

Referral type: Manual
Asking Price: Default £150000
Property Type: Semi-Detached House
Property Styles:

8199 Pelaw Crescent, Chester le Street, County Durham, DH2 2HX

Bedrooms: 3 Bathrooms: 1 Receptions: 2

Referrer *

Training Dave



Background information *

Referral type: Manual
Asking Price: Default £150000
Property Type: Semi-Detached House
Property Styles:

Does the property have an auction contract? *

☐ Yes ☐ No

Was the property previously on the market? *

☐ Yes ☐ No

17

Next screen is "**Lead Vendor details**" the detail will be brought over from CRM, ensure it is correct and all fields with a red star are completed. Once completed, click "**Refer**"

Lead vendor details

Sales Vendor235

Email: zaggy.dave@gmail.com

Contact number: 078551234564

Address: 8199 Pelaw Crescent, Chester le Street, County Durham, DH22HX

Is the vendor an organisation? *

☐

Yes

☒

No

Title *

Forename *

Surname *

Contact number *

☐

Vendor confirms details can be shared with iamsold *

Cancel

Refer

Lead vendor details

Mr Sales Vendor235

Email: zaggy.dave@gmail.com

Contact number: 078551234564

Address: 8199 Pelaw Crescent, Chester le Street, County Durham, DH22HX

Is the vendor an organisation? *

☐

Yes

☒

No

Title *

Forename *

Surname *

Contact number *

☒

Vendor confirms details can be shared with iamsold *

Cancel

Refer



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.

Email Text

18 Auction Referral Email Text

n.b. any words in the { } braces are merge fields where the data is pulled in from the property record to personalise the email.

Hi {Forename} ,

We've been reviewing the marketing of your property and wanted to share another option that could help move your sale forward.

Selling by Modern Method of Auction offers a clear timeline, committed buyers and the potential to complete in as little as **56-days***. Buyers can also purchase with a mortgage, helping open your property to a wider pool of potential buyers.

Key benefits include:

More certainty, with buyers committing financially to the purchase

Faster timescales, helping you plan your move with confidence

Transparent bidding, which can help drive competitive offers

An undisclosed Reserve Price, so your property won't sell for less than you're willing to accept

To see how it works and whether it could suit your sale, take a look at our short guide:

{Auction Marketing Material Link}

Or if you'd rather chat it through, just give us a call on {Branch Phone 1} .

Kind regards,
{User Forename} / {Branch Name}