AgentRoof CRM Settings

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Manage Tags

Tags help organize leads and make it easier to perform bulk actions on groups of leads.

What Are Tags?

A tag is used to group leads based on a common category or characteristic. Tags can be used to filter leads and perform bulk operations.

- A lead can have multiple tags.
- A tag can be assigned to multiple leads.

> **Note:** System tags created by AgentRoof cannot be edited or deleted.

View Leads Assigned to a Tag

1. Navigate to **Settings** from the left-hand menu.
2. Click **Tags**.
3. Locate the tag you want to view.
4. Click the number displayed in the **Leads** column.

The list of leads assigned to the selected tag will be displayed.

Remove a Tag from Assigned Leads

1. Select the checkbox next to the desired leads, or use **Select All**.
2. Click **Remove Tag**.

The selected tag will be removed from the chosen leads.

Create a New Tag

1. Navigate to **Settings** > **Tags**.
2. Click **+ Add New** at the top of the page.
3. Enter the tag name.
4. Click **Add Tag**.

The new tag will be created successfully.

Edit a Tag

> **Note:** System tags cannot be edited.

1. Navigate to **Settings** > **Tags**.
2. Locate the tag you want to edit.
3. Click **Edit** in the **Actions** column.
4. Update the tag name as needed.
5. Click **Update Tag**.

The tag will be updated successfully.

Delete a Tag

> **Notes:**
>
> - System tags created by AgentRoof cannot be deleted.
> - When a tag is deleted, it will be removed from all assigned leads, action plans, listing alerts, newsletters, and market updates.
> - Action plans assigned through the tag will be paused.
> - Listing alerts, newsletters, and market updates assigned through the tag will be removed.

Steps

1. Navigate to **Settings** > **Tags**.
2. Locate the tag you want to delete.
3. Click **Delete** in the **Actions** column.
4. Review the warning message.
5. Click **Confirm Delete**.

The tag will be deleted successfully.

Merge Tags

> **Notes:**
>
> - Certain system-managed tags cannot be merged. These include **Bounced**, **Do Not Disturb**, **Spam Reported**, **Stop SMS**, and **Unsubscribed**.
> - A minimum of 2 and a maximum of 10 tags can be merged at a time

> - When custom tags are merged, all non-main tags are deleted after the merge, and their associated leads are moved to the selected Main Tag.
> - System-managed tags behave differently. If a system tag is included in a merge and is **not selected as the Main Tag**, it will **not be deleted** after the merge. The tag will remain in the system to preserve communication preferences and compliance settings.

Steps

1. Navigate to **Settings** > **Tags**.
2. Select the checkboxes next to the tags you want to merge.
3. Click **Merge** from the top menu.
4. In the popup window, select the **Main Tag**.
5. Review the merge details.
6. Click **Merge Tags** to complete the process.

The selected tags will be merged successfully.

When tags are merged:

- The selected tags will be removed from all associated leads.
- The Main Tag will be assigned to all leads belonging to the merged tags if it is not already assigned.

Optional: Move Associated Items

You can choose to move the following items from the selected tags to the Main Tag:

- Action Plans
- Listing Alerts
- Newsletters
- Market Updates

When this option is selected, these items will be assigned to leads under the Main Tag if they are not already assigned.

Managing Stages in AgentRoof CRM

What Are Stages?

Stages help organize leads based on their current position in the sales process. Examples of stages include **Lead**, **Active Buyer**, **Active Seller**, and other custom stages that match your workflow.

> **Note:** A lead can be assigned to only one stage at a time, while a single stage can contain multiple leads.

Why Are Stages Important?

Stages provide a structured way to track lead progress and manage your sales pipeline. By using stages, you can:

- Monitor where leads are in the sales process.
- Organize leads based on their current status.
- Filter and manage leads more efficiently.
- Apply stage-specific automations and communications.
- Gain better visibility into your pipeline.

> **Note:** System default stages created by AgentRoof cannot be edited or deleted.

Viewing Leads by Stage

1. Navigate to **Settings**, and then select **Stages**.
2. All available stages will be displayed on the Stages page.
3. If needed, use the **Search Stage** field to quickly find a specific stage.
4. Click the number displayed in the **Leads** column.

The list of leads assigned to the selected stage will be displayed.

Creating a New Stage

1. Navigate to **Settings > Stages**.
2. Click the **+** icon or **Add New** button.
3. Enter the stage name.
4. Click **Add Stage**.

The new stage will be created successfully.

Merging Stages

> **Notes:**
>
> - When a custom stage is merged, the custom stage is deleted after its leads are moved to the selected stage. AgentRoof default stages cannot be deleted and will remain available after the merge.
> - A minimum of 2 and a maximum of 10 stages can be merged at a time.

Steps

1. Select the checkboxes next to the stages you want to merge.
2. Click **Merge Stages** from the top menu.
3. In the pop-up window, select the **Main Stage**.
4. Review the merging details.
5. Click **Merge Stages** to complete the process.

The selected stages will be merged successfully, and all associated leads and optional stage-related assignments will be consolidated under the Main Stage.

What Happens During a Stage Merge?

When stages are merged:

- The selected stages are removed from all associated leads.
- The Main Stage is assigned to all leads belonging to the selected stages if it is not already assigned.
- The selected stages are removed after the merge is completed.

Moving Associated Items

You can optionally move the following items from the selected stages to the Main Stage:

- Action Plans
- Listing Alerts
- Newsletters
- Market Updates

When this option is selected:

- Action Plans, Listing Alerts, Newsletters, and Market Updates from the selected stages will be assigned to leads under the Main Stage if they are not already assigned.

Manage Source

Sources help identify where your leads originate from, such as website inquiries, direct imports, Facebook campaigns, referrals, and other lead generation channels.

Sources are automatically created when a lead is added with a source name that does not already exist in the system.

View Sources

1. Log in to AgentRoof CRM.
2. From the left-hand menu, click **Settings**.
3. Select **Sources**.

The Sources page displays all available lead sources.

View Leads Assigned to a Source

1. Locate the desired source.
2. Click the number displayed in the **Leads** column.

A list of leads assigned to the selected source will be displayed.

You can review all leads currently associated with the selected source.

Create a New Source

1. Navigate to **Settings** > **Sources**.
2. Click **+ Add New** at the top of the page.
3. Enter the source name.
4. Click **Add Source**.

The source will be created successfully and will be available for lead assignment.

Edit a Source

> **Note:** System sources cannot be edited.

1. Navigate to **Settings** > **Sources**.
2. Locate the source you want to edit.
3. Click **Edit** in the Actions column.
4. Update the source name.

5. Click **Update Source**.

The source will be updated successfully.

Merge Sources

Merging sources allows you to consolidate multiple lead sources into a single source.

Steps

1. Navigate to **Settings** > **Sources**.
2. Select the sources you want to merge.
3. Click **Merge** from the top menu.
4. Select the **Main Source**.
5. Click **Merge Sources** to complete the process.

The selected sources have been merged successfully.

When sources are merged:

- The selected sources will be removed from all associated leads.
- The Main Source will be assigned to all leads belonging to the merged sources if it is not already assigned.

Optional: Move Associated Items

You may select the option:

Move Action Plans, Listing Alerts, Newsletters, and Market Updates from selected Sources to Main Source

When enabled:

- Action plans, listing alerts, newsletters, and market updates from the selected sources will be assigned to leads under the Main Source if they are not already assigned.

System Source Behavior

If a system source is included in the merge:

- The system source itself will not be deleted.
- Leads assigned to the system source will be reassigned to the selected Main Source.

You have successfully learned how to manage sources in AgentRoof CRM.

How to merge Leads Under Same Tag

Tag merging logic and constrains

Managing Signatures in AgentRoof CRM

What Are Signatures?

Email signatures are predefined blocks of content that are automatically added to the end of emails sent from AgentRoof CRM.

A signature can contain text, images, contact information, social media links, company branding, and other professional details.

Common examples include:

- Thank you and regards messages
- Agent name and designation
- Contact information
- Company logo
- Social media links
- Custom branded email footers

Why Are Signatures Important?

Signatures help maintain a professional and consistent appearance across all outgoing communications. They can be used in manually sent emails as well as automated email campaigns.

By using signatures, you can:

- Present a professional brand image.
- Provide contact information to recipients.
- Maintain consistency across communications.
- Include company logos and branding.
- Save time by automatically appending information to emails.

Accessing the Signatures Page

1. Navigate to the menu bar and click **Settings**.
2. Select **Signatures**.

The Signatures page will display all available signatures in your CRM.

Creating a Signature

1. Open the **Signatures** page.
2. Use the editor workspace to create your signature.

3. Customize the content using the available formatting options, including:
    - Text alignment
    - Font styles
    - Font size
    - Text color
    - Lists and formatting tools
4. Enter the desired signature content.

You can also switch to the HTML editor and create a signature using custom HTML code.

5. Click **Save Signature**.

The signature will be created successfully.

Creating Multiple Signatures

1. Click the **+** icon located in the Signatures row.
2. Enter a name for the signature.
3. If you want the signature to be used by default, enable the **Default** toggle.
4. Enter the signature content in the editor workspace.
5. Scroll down and click **Add Signature**.

The new signature will be created and added to the list of available signatures.

Setting a Default Signature

1. Locate the signature you want to use as the default.
2. Enable the **Default** toggle for that signature.
3. Save the changes if required.

The selected signature will be used as the default signature for emails.

Adding an Image to a Signature

1. Open the signature editor.
2. Click the **Insert/Edit Image** icon in the editor toolbar.
3. If you have the image URL, paste it into the source field.
4. Enter the desired image width and height.
5. Click **Save**.

Alternatively:

1. Select the **Upload** option.
2. Drag and drop the image or click **Browse** to select an image from your device.
3. Upload the image.
4. Click **Save**.

The image will be added to the signature.

Need a Custom Signature?

If you would like a professionally designed signature that matches your branding, contact the AgentRoof Support Team for assistance.

Your signatures are now available for use in emails sent from AgentRoof CRM, including automated email communications and campaigns.

Listing Settings

Will do later

Billing Portal

What is Billing Portal?

The Billing Portal page will display your billing information, payment methods, invoices, and subscription-related details.

How to Access the Billing Portal

1. Navigate to **Settings > Billing Portal** from the left-hand menu.
2. A new window will open automatically.

How to View Payment History

1. Scroll down to the **Invoice History** section.

All previous invoices and payment records will be displayed.

How to Change Your Payment Card

1. Navigate to the **Payment Methods** section.
2. Click **Add Payment Method**.
3. Enter the required card information.
4. Save the payment method.

The new card will be added successfully.

How to Set a Card as the Default Payment Method

1. Locate the card you want to set as the default payment method.
2. Click the three-dot menu located on the right side of the card.
3. Select **Make Default**.

The selected card will be used as the default payment method for future charges.

How to Download an Invoice

1. Scroll down to the **Invoice History** section.
2. Locate the invoice you want to download.
3. Click **Download Invoice**.

The invoice will be downloaded to your device.

How to Update Your Billing Information

1. Click **Update Information** under the **Billing Information**.
2. Enter or modify the required billing details.
3. Click **Save**.

The billing information will be updated successfully.

Important Information

> **Note:** AgentRoof does not store your card details. All payment methods are securely managed through the Stripe Billing Portal.

> AgentRoof may create invoices for subscription charges and additional services. These invoices can be automatically charged to your default payment method through Stripe.

How to Contact AgentRoof Support

AgentRoof Support can be contacted through multiple channels depending on your preference and the type of assistance required.

Contacting Support by Phone, WhatsApp, or Email

You can contact AgentRoof Support directly using:

- Phone
- WhatsApp
- Email

These contact methods are available for general inquiries, technical assistance, and account-related questions.

Contacting Support Through the CRM

1. Log in to AgentRoof CRM.
2. From the left-hand navigation menu, click **Contact Us**.
3. The Contact Us page will be displayed.

You can either contact support directly using the email address provided on the page or submit a support request using the help form.

Submitting a Support Request

1. Select what you need help with:
   - Website
   - Subscription
   - CRM
2. Enter your question, comment, or issue in the message field.
3. If required, attach a supporting file, document, or screenshot.

Supported file formats include:

- JPG
- JPEG
- PNG
- DOC
- DOCX
- PDF

- TXT
- CSV

> **Note:** The maximum supported file size is 10 MB.

4. Submit the support request.

The AgentRoof Support Team will review your request and respond accordingly.

Contacting Support Through the AgentRoof Website

1. Navigate to the AgentRoof website.
2. Hover over the **More** option in the top navigation menu.
3. Click **Contact Us**.
4. Select the toggle whether your want **Support** or **Sales**

On the Contact Us page, provide the following information:

1. Enter your name.
2. Enter your email address.
3. Enter your phone number.
4. Enter your message in the field labeled **"Do you have any message for us?"**

> **Note:** Before submitting the form, select the consent checkbox indicating that you agree to share your information for communication purposes, including support responses and promotional communications.

5. Click **Submit**.

Your inquiry will be submitted to the AgentRoof Support Team and they will assist you through the appropriate communication channel.