Brokerage

CRM Features of a brokerage user

- My Realtors
- My Brokerage
- Lead Sharing
- Action Plan Sharing

My Realtors

What Is a Brokerage?

A Brokerage account allows brokers to manage and collaborate with realtors within AgentRoof CRM.

Brokerages can manage their own leads, assign leads to realtors, and control how new leads are distributed among realtors.

The My Realtors section allows brokerages to add realtors, manage realtor relationships, configure lead transfer settings, and monitor assigned leads.

Access My Realtors

1. Log in to your Brokerage account.
2. From the left-hand menu, click **My Realtors**.

The My Realtors page displays all realtors associated with the brokerage.

From this page, you can view:

- Realtor Name
- Email Address
- Website
- Assigned Leads
- Source
- Available Actions

Add a Realtor

1. Navigate to **My Realtors**.
2. Click **Add Realtor**.
3. Select one or more realtors.
4. Click **Submit**.

An invitation will be sent to the selected realtor(s).

Invitation Status

After the invitation is sent, the Actions column will display **Request Sent**.

Once the realtor accepts the invitation, their status becomes active and they will appear as an active realtor under the brokerage.

Configure Lead Transfer

Lead Transfer controls how new leads are assigned to realtors.

1. Navigate to **My Realtors**.
2. Click **Lead Transfer**.

You can choose one of the following options:

Manual Assignment

New leads are not assigned automatically.

The brokerage must manually assign leads to realtors.

Automatic Assignment

New leads are assigned automatically to realtors.

Round Robin Distribution

Round Robin distributes new leads evenly among active realtors.

For example:

3 realtors Realtor A, Realtor B & Realtor C are connected with the brokerage, then the leads 1 to 5 will be assigned as follows,

Lead 1 → Realtor A
Lead 2 → Realtor B
Lead 3 → Realtor C
Lead 4 → Realtor A
Lead 5 → Realtor B

This process continues in sequence to ensure fair lead distribution.

Click **Save** after selecting the desired lead transfer method.

Assign Sources to a Realtor

Sources can be assigned to realtors to automatically direct leads from selected sources to the assigned realtor.

1. Navigate to **My Realtors**.
2. Select the desired realtor.
3. Click **Assign Source**.
4. Select one or more sources.
5. Click **Apply**.

The selected sources will be assigned to the realtor successfully.

For example:

Realtor A & B got assigned to the source 'Website" and Realtor C got assigned with the source "Facebook". Assume that the leads are coming in the order such as Leads 1 & 2 from website, Lead 3 from Facebook, Lead 4, 5 & 6 from website, then the leads will distributed as follows

Lead 1 → Realtor A
Lead 2 → Realtor B
Lead 3 → Realtor C
Lead 4 → Realtor A
Lead 5 → Realtor B
Lead 6 → Realtor A

View Leads Assigned to a Realtor

1. Navigate to **My Realtors**.
2. Locate the desired realtor.
3. Click **View** in the Actions column.

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

Remove a Realtor

1. Navigate to **My Realtors**.
2. Locate the desired realtor.
3. Click **Delete** in the Actions column.
4. Confirm the deletion.

The realtor will be removed from the brokerage successfully.

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

My Brokerage

What is My Brokerage?

My Brokerage allows realtors to review and manage brokerage invitations sent to their account.

Through the My Brokerage page, realtors can:

- Review brokerage invitations
- View brokerage information
- Accept or reject brokerage requests
- Manage their brokerage association
- Exit an existing brokerage relationship

Access My Brokerage

1. Navigate to the left-hand menu.
2. Click **My Brokerage**.

The My Brokerage page will be displayed.

Review Brokerage Invitations

When a brokerage sends an invitation, it will appear on the My Brokerage page.

The invitation includes brokerage details such as:

- Brokerage Name
- Email Address
- Phone Number
- Website

Review the information carefully before deciding whether to accept or reject the invitation.

Accept a Brokerage Invitation

1. Open the **My Brokerage** page.
2. Review the brokerage details.
3. Click **Accept**.

The brokerage request will be approved and your account will become associated with the selected brokerage.

Once accepted, the brokerage information will be displayed on the My Brokerage page.

> **Note**
>
> A realtor can only be associated with **one brokerage at a time**.

Reject a Brokerage Invitation

1. Open the **My Brokerage** page.
2. Review the brokerage details.
3. Click **Reject**.

The invitation will be declined and no brokerage association will be created.

View Brokerage Information

After accepting a brokerage invitation, the My Brokerage page displays the details of your associated brokerage.

Available information includes:

- Brokerage Name
- Email Address
- Phone Number
- Website

This information can be reviewed at any time from the My Brokerage page.

Exit a Brokerage

If you no longer wish to be associated with a brokerage:

1. Navigate to **My Brokerage**.
2. Click **Exit the Brokerage**.
3. Confirm the action if prompted.

The brokerage association will be removed successfully.

Once removed, you will no longer be connected to the brokerage and may choose to associate with a different brokerage in the future.

Note

Because a realtor can only be associated with one brokerage at a time, you must exit your current brokerage before joining another brokerage.

Conclusion

You have successfully learned how to use the My Brokerage feature in AgentRoof CRM, including reviewing brokerage invitations, accepting or rejecting requests, viewing brokerage information, and managing your brokerage association.

Lead Sharing

What Is a Brokerage?

A brokerage account allows brokers to manage realtors and distribute leads among them.

Lead Sharing enables brokers to transfer leads from the brokerage account to connected realtors. Once transferred, the lead becomes available in the realtor's CRM while remaining visible to the brokerage.

Access Lead Sharing

1. Log in to your Brokerage account.
2. Navigate to **CRM** from the left-hand menu.

The CRM page displays all leads available to the brokerage.

From this page, you can view information such as:

- Lead Name
- Phone Number
- Email Address
- Activity
- Transfer Date
- Lead Status
- Assigned Realtor Information
- Additional Lead Details

Transferred leads display a label indicating the assigned realtor.

Example:

Assigned To: Realtor Name

Lead Tabs

The CRM page contains two tabs:

All Leads

Displays all leads within the brokerage account, including leads that have been transferred to realtors.

My Leads

Displays only leads that currently belong to the brokerage and have not been transferred to a realtor.

Transfer Leads to a Realtor

1. Navigate to **CRM**.
2. Select one or more leads.
3. Click **More** from the top menu.
4. Click **Lead Transfer.**
5. Select the realtor who will receive the leads.
6. Click **Submit**.

The selected leads will be transferred successfully.

Important Note

Only realtors who have accepted the invitation from the **My Realtors** page can receive transferred leads.

Transferred Lead Identification

After a lead is transferred:

- The lead remains visible within the brokerage CRM.
- The lead displays a label showing the assigned realtor.

Example:

Assigned To: Realtor Name

This allows brokers to easily identify which realtor is responsible for the lead.

Lead Visibility in the Realtor Account

When a lead is transferred:

1. The lead is automatically added to the realtor's CRM.
2. The realtor can manage the lead like any other assigned lead.
3. The lead displays a label indicating the brokerage that assigned it.

Example:

Assigned By: Brokerage Name

This helps the realtor identify where the lead originated.

You have successfully learned how to manage Lead Sharing in AgentRoof CRM.

Action Plan Sharing

What Is an Action Plan?

An Action Plan is an automated workflow that performs predefined actions for assigned leads over a specified period of time.

Action Plans help automate follow-up activities such as sending emails, sending SMS messages, adding tags, changing stages, creating notes, assigning other action plans, and more.

What Is a Brokerage?

A brokerage account allows brokers to manage realtors and share resources such as Action Plans with connected realtors.

Sharing Action Plans helps ensure that realtors can use brokerage-approved automation workflows without needing to recreate them manually.

Share an Action Plan

1. Log in to your Brokerage account.
2. From the left-hand menu, click **Automation**.
3. Select **Action Plans**.
4. Select the Action Plan you want to share.
5. Click **Share** from the top menu.
6. Select one or more realtors.
7. Click **Submit**.

The Action Plan will be shared successfully.

Important Notes

- Action Plans created by the Super Admin cannot be shared with realtors.
- Only brokerage-created Action Plans can be shared.
- Multiple realtors can be selected during the sharing process.

Shared Templates

When an Action Plan is shared, any templates associated with the Action Plan are automatically transferred to the realtor account.

This includes:

- Email Templates
- SMS Templates

The transferred templates will appear in the realtor's Templates section.

Templates shared from a brokerage are identified with the label:

Created by Brokerage

This allows realtors to distinguish brokerage-provided templates from their own templates.

You have successfully learned how to share Action Plans in AgentRoof CRM.