Listing Alerts

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New Lisiting Alerts

What is a New Listing Alert?

The **New Listing Alert** feature allows you to automatically notify leads about newly listed properties that match their preferences.

Alerts can be configured using various property criteria, including location, property details, pricing, and other listing preferences. You can choose how often alerts are sent and assign them to individual leads, tags, stages, or sources.

Once configured, email alerts will be sent whenever matching properties become available, helping keep your leads informed about the latest listings.

Access New Listing Alerts

1. From the left-hand menu, click **Alerts**.
2. Select **New Listing Alerts**.

The New Listing Alerts page will be displayed.

This page provides a centralized view of all listing alerts configured in your CRM. From here, you can monitor alert assignments, view active and paused leads, and perform actions such as creating, editing, assigning, or deleting alerts.

You can also click the numbers displayed under the **Active** and **Paused** columns to view and manage the leads assigned to a particular alert.

Create a New Listing Alert

1. Navigate to the **New Listing Alerts** page.
2. Click **+ Add New Listing Alert**.

A popup window will appear prompting you to enter the alert details.

3. Enter an **Alert Name**.
4. Select one or more **Areas or Cities**.
5. Choose the **Property Category**.
6. Select the **Building Type**.
7. Select the **Building Style**.
8. Specify the **Property Status**.
9. Select the preferred **Basement Type**.
10. Enter the required **Garage Spaces**.

11. Specify the **Square Footage** requirements.
12. Enter the preferred **Days on Market**.
13. Select the **Alert Frequency**.
14. Specify the **Number of Properties** to include in each alert.
15. Define the **Bedroom Requirements**.
16. Define the **Bathroom Requirements**.
17. Enter the desired **Price Range**.
18. Click **Create Alert**.

The listing alert will be created successfully.

Edit a Listing Alert

1. Navigate to the **New Listing Alerts** page.

2. Locate the alert you want to modify.
3. Click **Edit**.
4. Make the required changes.
5. Click **Update Alert**.

The alert will be updated successfully.

Edit a New Listing Alert from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead.
3. Select the **Profile** tab.
4. Scroll down to the **New Listing Alerts** section.
5. Locate the alert you want to edit.
6. Review the ownership label displayed for the alert:
    - **Self** – The alert was created and is managed by the lead.
    - **Agent** – The alert is managed by the realtor.
7. Click **Edit**.
8. If the alert is marked as **Self**, a confirmation message will appear indicating that ownership of the alert will be transferred from **Self** to **Agent**.
9. Click **Confirm** to continue.
10. Update the desired alert settings.
11. Click **Update Alert**.

The alert will be updated successfully.

Note: Editing a Self-managed alert transfers ownership of the alert from the lead to the realtor. After the transfer, the ownership label will be displayed as **Agent**.

View Leads Assigned to a Listing Alert

1. Navigate to the **New Listing Alerts** page.
2. Locate the desired listing alert.
3. Click the number displayed in the **Active** column to view active leads.
4. Click the number displayed in the **Paused** column to view paused leads.

The corresponding list of assigned leads will be displayed.

Manage Active Lead Assignments

1. Click the number displayed in the **Active** column.
2. Select one or more leads from the list.
3. Choose one of the following actions:
    - **Pause** – Temporarily stop sending the alert to the selected leads.

- **Remove** – Remove the alert from the selected leads.

The selected action will be applied successfully.

Manage Paused Lead Assignments

1. Click the number displayed in the **Paused** column.
2. Select one or more leads from the list.
3. Choose one of the following actions:
    - **Resume** – Reactivate the alert for the selected leads.
    - **Remove** – Remove the alert from the selected leads.

The selected action will be applied successfully.

Manage Listing Alert Status from a Lead Profile

You can also pause or resume a New Listing Alert directly from a lead profile.

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **New Listing Alerts** section.
4. Find the alert you want to manage.

Pause a Listing Alert

1. Click **Pause** next to the alert.
2. A confirmation message will appear.
3. Click **Confirm**.

The alert will be paused for the selected lead, and no further listing alert emails will be sent until it is resumed.

Resume a Listing Alert

1. Click **Resume** next to the paused alert.
2. A confirmation message will appear.
3. Click **Confirm**.

The alert will be reactivated and will continue sending matching listing alerts to the lead.

Assign a Listing Alert

Listing alerts can be assigned from multiple locations within AgentRoof CRM.

Assign from the Alerts Page

1. Navigate to **New Listing Alerts**.
2. Select the desired listing alert.
3. Click **Assign**.

You can assign the alert using any of the following options:

Assign to Leads

1. Click **Leads**.
2. Select one or more leads.
3. Click **Apply**.

Assign to Tags

1. Click **Tags**.
2. Select one or more tags.
3. Click **Apply**.

The alert will be assigned to all leads associated with the selected tags.

Assign to Stages

1. Click **Stages**.
2. Select one or more stages.
3. Click **Apply**.

The alert will be assigned to all leads associated with the selected stages.

Assign to Sources

1. Click **Sources**.
2. Select one or more sources.
3. Click **Apply**.

The alert will be assigned to all leads associated with the selected sources.

Assign from the CRM Page

1. Navigate to **CRM**.
2. Select one or more leads.
3. Click M**ore** from the top menu.
4. Click **New Listing Alert.**
5. Select the desired alert.
6. Click **Apply**.

The alert will be assigned successfully.

Assign from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **New Listing Alerts** section.
4. Click **Add Alert**.
5. Select the desired listing alert.
6. Click **Submit**.

The alert will be assigned successfully.

Remove a Listing Alert from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **New Listing Alerts** section.
4. Find the alert you want to remove.
5. Click **Delete**.
6. Confirm the removal if prompted.

The listing alert will be removed successfully from the lead.

Note: This action only removes the alert assignment from the lead profile. The New Listing Alert itself will remain available in the CRM. To permanently delete a New Listing Alert, it must be removed from all assigned leads and then deleted from the **New Listing Alerts** page.

Delete a Listing Alert

1. Navigate to the **New Listing Alerts** page.
2. Select the checkbox next to the alert you want to delete.
3. Click **Delete** from the top menu.
4. Confirm the deletion.

> **Note:** Listing alerts that are currently assigned to one or more leads cannot be deleted. Remove the alert assignment from all associated leads before attempting to delete the alert.

The selected listing alert will be deleted successfully.

Alert Execution

Listing alerts are processed automatically each day between **9:00 AM and 10:00 AM**.

Matching property listings will be sent to assigned leads according to the selected alert frequency.

Important Notes

- If a lead does not open up to 10 consecutive listing alert emails, the alert will automatically stop sending to that lead. This helps protect email deliverability and reduces the likelihood of emails being marked as spam.
- Listing alerts assigned to leads cannot be deleted until they have been removed from all associated leads.

You have successfully learned how to manage New Listing Alerts in AgentRoof CRM.

Neighborhood Alert

What is a Neighbourhood Alert?

The Neighbourhood Alert feature allows you to send sold listing alerts to your leads based on specific criteria such as City, Property Type, Price Range, Bedrooms, Bathrooms, and more.

You can configure the alert frequency and assign alerts to Tags, Stages, Sources, or individual leads. Once configured, email notifications are automatically sent whenever a property matching the selected criteria is sold, helping your leads stay informed about activity in their neighbourhood.

Create a Neighbourhood Alert

1. Navigate to the **Alerts** page.
2. Click **Neighbourhood Alert**.
3. Click the **+** icon in the Neighbourhood Alerts row.

Complete the Required Fields

1. Enter the name of the alert.
2. Select the area.
3. Select the property category.
4. Select the building type.
5. Select the building style.
6. Select the property status.
7. Select the basement option.
8. Select the garage space requirement.
9. Select the square footage range.
10. Select the sold period (in months).
11. Select the alert frequency.
12. Enter the number of properties to send. A maximum of 10 properties can be included in a single alert.
13. Enter the number of bedrooms.
14. Enter the number of bathrooms.
15. Specify the price range between $0 and $5,000,000.
16. Click **Create Alert**.

The new Neighbourhood Alert will be created successfully.

Edit a Neighbourhood Alert

Neighbourhood Alerts can be edited from either the Neighbourhood Alerts page or directly from a lead's profile.

Edit from the Neighbourhood Alerts Page

1. Locate the Neighbourhood Alert you want to modify.
2. Click **Edit** under the Actions column.
3. Update the required criteria and settings.
4. Click **Update Alert**.

The changes will be saved successfully.

Edit from the Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Scroll down to the **Neighbourhood Alert** section.
5. Click the **Edit** icon next to the desired alert.

> **Note:** If the alert is labelled **Self**, it was originally created by the lead through the website.

6. Review the confirmation message and click **Continue**.
7. Update the required criteria and settings.
8. Click **Update Alert**.

> **Note:** Editing a lead-created alert may override the lead's original preferences. Once the changes are saved, ownership of the alert will change from **Self** to **Agent**.

The changes will be saved successfully.

Delete a Neighbourhood Alert

1. Select the checkbox next to the Neighbourhood Alert you want to delete.
2. Click the **Delete** icon from the Neighbourhood Alerts row.
3. Review the confirmation message.
4. Click **Confirm**.

The selected Neighbourhood Alert will be deleted successfully.

> **Note:** Neighbourhood Alerts that are currently assigned to active leads cannot be deleted.

Assign a Neighbourhood Alert

Neighbourhood Alerts can be assigned from multiple locations within AgentRoof CRM.

Assign from the Neighbourhood Alert Page

1. Select the checkbox next to the desired Neighbourhood Alert.

Assign to Leads

1. Hover over the **Lead** icon.
2. Click **Assign to Lead**.
3. Search for and select the desired leads.
4. Click **Assign**.

You can assign the alert to multiple leads.

Assign to Tags

1. Hover over the **Tag** icon.
2. Click **Assign to Tag**.
3. Select one or more tags.
4. Click **Assign**.

Assign to Stages

1. Hover over the **Stage** icon.
2. Click **Assign to Stage**.
3. Select one or more stages.
4. Click **Assign**.

Assign to Sources

1. Hover over the **Source** icon.
2. Click **Assign to Source**.
3. Select one or more sources.
4. Click **Assign**.

> **Note:** If the required Tag, Stage, or Source is not available, you can create a new one directly from the assignment window before completing the assignment.

The selected Neighbourhood Alert will be assigned successfully.

Assign from the CRM Page

1. Navigate to **CRM**.
2. Select the checkbox next to the desired lead.
3. Click **Neighbourhood Alert** from the action bar.
4. Select the Neighbourhood Alert you want to assign.
5. Click **Assign**.

The selected Neighbourhood Alert will be assigned successfully.

Assign from the Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Scroll to the **Neighbourhood Alert** section.
5. Click the **+** icon.
6. Select the desired Neighbourhood Alert.
7. Confirm the selection.

The selected Neighbourhood Alert will be assigned successfully.

Manage Leads Assigned to a Neighbourhood Alert

View Active Leads

1. Locate the desired Neighbourhood Alert.
2. Click the **Active Lead Count**.

A pop-up window displays all active leads currently assigned to the selected Neighbourhood Alert.

Pause Active Leads

1. Click the **Active Lead Count** for the desired Neighbourhood Alert.
2. Select the checkbox next to the lead or leads you want to pause.
3. Click **Pause**.
4. Review the confirmation message.
5. Click **Confirm**.

The selected leads will remain assigned to the Neighbourhood Alert but will temporarily stop receiving alert notifications.

View Paused Leads

1. Click the **Paused Lead Count** for the desired Neighbourhood Alert.

A pop-up window displays all leads currently paused for the selected Neighbourhood Alert.

Resume Paused Leads

1. Click the **Paused Lead Count** for the desired Neighbourhood Alert.
2. Select the checkbox next to the lead or leads you want to resume.

3. Click **Resume**.
4. Review the confirmation message.
5. Click **Confirm**.

The selected leads will resume receiving Neighbourhood Alert notifications based on the configured alert schedule.

Remove Leads from a Neighbourhood Alert

1. Click the **Active Lead Count** for the desired Neighbourhood Alert.
2. Select the checkbox next to the lead or leads you want to remove.
3. Click **Remove**.
4. Review the confirmation message.
5. Click **Confirm**.

The selected leads will be removed from the Neighbourhood Alert and will no longer receive notifications associated with that alert.

> **Important Notes**
>
> - Multiple leads can be selected and managed simultaneously.
> - Paused leads remain assigned to the Neighbourhood Alert.
> - Removed leads are no longer associated with the Neighbourhood Alert.
> - Active and paused lead counts update automatically after changes.

Manage Neighbourhood Alerts from a Lead Profile

Pause a Neighbourhood Alert

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Locate the **Neighbourhood Alert** section.
5. Click **Pause** next to the desired alert.
6. Review the confirmation message.
7. Click **Confirm**.

The Neighbourhood Alert will be paused successfully and the lead will temporarily stop receiving notifications from that alert.

Resume a Neighbourhood Alert

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Locate the paused Neighbourhood Alert.
5. Click **Resume**.
6. Review the confirmation message.
7. Click **Confirm**.

The Neighbourhood Alert will be reactivated successfully and the lead will begin receiving notifications again according to the configured schedule.

Remove a Neighbourhood Alert from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Locate the **Neighbourhood Alert** section.
5. Click **Delete** next to the desired alert.
6. Review the confirmation message.
7. Click **Confirm**.

The Neighbourhood Alert will be removed successfully from the lead profile.

How and When Are Neighbourhood Alerts Executed?

Neighbourhood Alerts are processed according to the configured alert frequency.

Alert emails are generated and delivered between **9:00 AM and 10:00 AM** on the scheduled execution date.

> **Important Note**
>
> If a lead does not open up to 10 consecutive Neighbourhood Alert emails, AgentRoof CRM automatically stops sending additional Neighbourhood Alert emails to that lead. This helps maintain email deliverability and reduces the likelihood of messages being marked as spam.

Conclusion

You have successfully learned how to create, edit, delete, assign, pause, resume, and manage Neighbourhood Alerts in AgentRoof CRM.

Open House Alert

What Is an Open House Alert?

An **Open House** is a scheduled event where a property is made available for prospective buyers or tenants to visit and view in person.

The **Open House Alert** feature allows you to automatically notify leads about upcoming open houses that match their preferences. Alerts can be configured based on criteria such as city, property type, price range, open house date, bedrooms, bathrooms, and more.

You can choose the alert frequency and assign alerts to leads, tags, stages, or sources. Once configured, email alerts will be sent whenever matching open house listings become available.

Access Open House Alerts

1. From the left-hand menu, click **Alerts**.
2. Select **Open House Alerts**.

Create an Open House Alert

1. Click the **+ Add New Open House Alert** button.
2. Complete the required fields:
   - Alert Name
   - Area or City
   - Property Category
   - Building Type
   - Building Style
   - Property Status
   - Basement Type
   - Garage Spaces
   - Square Footage
   - Days on Market
   - Open On Date
   - Alert Frequency
   - Number of Properties to Include
   - Bedroom Requirements
   - Bathroom Requirements
   - Price Range
3. Click **Create Alert**.

The Open House Alert will be created successfully.

Edit an Open House Alert

1. Navigate to **Open House Alerts**.
2. Locate the alert you want to modify.
3. Click **Edit**.
4. Update the required fields.
5. Click **Update Alert**.

The alert will be updated successfully.

View Leads Assigned to an Open House Alert

1. Navigate to **Open House Alerts**.
2. Locate the desired alert.

The number of assigned leads is displayed under the alert.

View Active Leads

1. Click the number displayed in the **Active** column.

The list of active leads assigned to the alert will be displayed.

2. Select one or more leads, or use **Select All**.
3. Choose one of the following actions:
   - **Pause** – Temporarily stop sending the alert to the selected leads.
   - **Delete** – Remove the alert from the selected leads.

View Paused Leads

1. Click the number displayed in the **Paused** column.

The list of paused leads assigned to the alert will be displayed.

2. Select one or more leads, or use **Select All**.
3. Choose one of the following actions:
   - **Resume** – Reactivate the alert for the selected leads.
   - **Delete** – Remove the alert from the selected leads.

Manage Open House Alert Status from a Lead Profile

You can also pause or resume an Open House Alert directly from a lead profile.

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **Open House Alerts** section.

4. Find the alert you want to manage.

Pause an Open House Alert

1. Click **Pause** next to the alert.
2. A confirmation message will appear.
3. Click **Confirm**.

The alert will be paused successfully, and no further Open House Alert emails will be sent until it is resumed.

Resume an Open House Alert

1. Click **Resume** next to the paused alert.
2. A confirmation message will appear.
3. Click **Confirm**.

The alert will be reactivated successfully, and matching Open House Alert emails will continue to be sent to the lead.

Assign an Open House Alert

Open House Alerts can be assigned from the Alerts page, CRM page, or a Lead Profile.

Assign from the Alerts Page

1. Navigate to **Open House Alerts**.
2. Select the desired alert.

Assign to Leads

1. Click **Leads** from the top menu.
2. Select one or more leads.
3. Click **Submit**.

Assign to Tags

1. Click **Tags** from the top menu.
2. Select one or more tags.
3. Click **Apply**.

The alert will be assigned to all leads associated with the selected tags.

Assign to Stages

1. Click **Stages** from the top menu.
2. Select one or more stages.

3. Click **Apply**.

The alert will be assigned to all leads associated with the selected stages.

Assign to Sources

1. Click **Sources** from the top menu.
2. Select one or more sources.
3. Click **Apply**.

The alert will be assigned to all leads associated with the selected sources.

Assign from the CRM Page

1. Navigate to **CRM**.
2. Select one or more leads.
3. Click **More** from the top menu.
4. Click **Open House Alert.**
5. Select the desired Open House Alert.
6. Save the assignment.

Assign from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **Open House Alerts** section.
4. Click **Add**.
5. Select the desired Open House Alert.
6. Click **Submit**.

The alert will be assigned successfully.

> **Note:** Alerts assigned to one or more leads cannot be deleted. Remove the alert from all associated leads before attempting to delete it.

Delete from the Alerts Page

1. Navigate to **Open House Alerts**.
2. Select the alert you want to delete.
3. Click **Delete** from the top menu.

4. Confirm the deletion.

Delete from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **Open House Alerts** section.
4. Click **Delete** next to the alert you want to remove.
5. Confirm the action.

The Open House Alert will be removed successfully from the selected lead.

Note: This action only removes the alert assignment from the lead profile. The Open House Alert itself will remain available in the CRM. To permanently delete an Open House Alert, it must be removed from all assigned leads and then deleted from the **Open House Alerts** page.

Alert Execution

Open House Alerts are processed automatically each day between **9:00 AM and 10:00 AM**.

Matching open house listings will be sent to assigned leads according to the selected frequency.

Important Notes

- If a lead does not open up to 10 consecutive alert emails, the alert will automatically stop sending to that lead. This helps protect email deliverability and reduces the likelihood of emails being marked as spam.
- Alerts assigned to leads cannot be deleted until they have been removed from all associated leads.

You have successfully learned how to manage Open House Alerts in AgentRoof CRM.

Price Drop Alert

What is Price Drop Alert?

The Price Drop Alert feature allows you to send listing alerts to your leads based on specific criteria such as City, Property Type, Price Range, Percentage of Price Drop, Bedrooms, Bathrooms, and more.

You can configure the alert frequency and assign alerts to Tags, Stages, Sources, or individual leads. Once configured, email notifications are automatically sent whenever a property matching the selected criteria experiences a price reduction, helping your leads stay informed about the latest price drop opportunities.

Create a Price Drop Alert

1. Navigate to **Alerts > Price Drop Alerts**.
2. Click the **+** icon in the Price Drop Alerts row.
3. Enter the name of the alert.
4. Select the area.
5. Select the property category.
6. Select one or more building types.
7. Select one or more building styles.
8. Select the property status.
9. Select the basement option.
10. Select the garage space requirement.
11. Select the square footage range.
12. Select the Days on Market.
13. Select the alert frequency.
14. Enter the number of properties to send. A maximum of 10 properties can be included in a single alert.
15. Enter the number of bedrooms.
16. Enter the number of bathrooms.
17. Specify the price range between $0 and $5,000,000.
18. Select the percentage of price drop between 1% and 50%.
19. Click **Create Alert**.

The new Price Drop Alert will be created successfully.

Edit a Price Drop Alert

Price Drop Alerts can be edited from either the Price Drop Alerts page or directly from a lead's profile.

Edit from the Price Drop Alerts Page

1. Navigate to the Price Drop Alerts page.
2. Locate the alert you want to update.
3. Click **Edit** under the Actions column.
4. Modify the required criteria and settings.
5. Click **Update Alert**.

The changes will be saved successfully.

Edit from the Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Scroll down to the **Price Drop Alerts** section.
5. Click the **Edit** icon next to the desired alert.

> **Note:** If the alert is labelled **Self**, it was originally created by the lead through the website.

6. Review the confirmation message and click **Continue**.
7. Modify the required criteria and settings.
8. Click **Update Alert**.

> **Note:** Editing a lead-created alert may override the lead's original preferences. Once the changes are saved, ownership of the alert will change from **Self** to **Agent**.

The changes will be saved successfully.

Delete a Price Drop Alert

How to Delete a Price Drop Alert?

1. Navigate to the **Price Drop Alerts** page.
2. Select the checkbox next to the alert you want to delete.
3. Click the **Delete** icon from the Price Drop Alerts row.
4. Review the confirmation message.
5. Click **Confirm** to proceed.

The selected alert will be deleted successfully.

> **Note**
>
> Price Drop Alerts that are currently assigned to active leads cannot be deleted.

Assign a Price Drop Alert

Price Drop Alerts can be assigned from multiple locations within AgentRoof CRM.

Assign from the Price Drop Alerts Page

1. Navigate to the **Price Drop Alerts** page.
2. Select the checkbox next to the alert you want to assign.

Assign to Leads

1. Hover over the **Lead** icon.
2. Click **Assign to Lead**.
3. Search for and select one or more leads.
4. Click **Assign**.

Assign to Tags

1. Hover over the **Tag** icon.
2. Click **Assign to Tag**.
3. Select one or more tags.
4. Click **Assign**.

Assign to Stages

1. Hover over the **Stage** icon.
2. Click **Assign to Stage**.
3. Select one or more stages.
4. Click **Assign**.

Assign to Sources

1. Hover over the **Source** icon.
2. Click **Assign to Source**.
3. Select one or more sources.
4. Click **Assign**.

> **Note**
>
> If the required Tag, Stage, or Source is not available, you can create a new one directly from the assignment window before completing the assignment.

The selected Price Drop Alert will be assigned successfully.

Assign from the CRM Page

1. Navigate to **CRM**.
2. Select the checkbox next to the desired lead.
3. Click **Price Drop Alert** from the action bar.
4. Select the Price Drop Alert you want to assign.
5. Click **Assign**.

The selected Price Drop Alert will be assigned successfully.

Assign from the Lead Profile Page

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Scroll to the **Price Drop Alert** section.
5. Click the **+** icon.
6. Select the desired Price Drop Alert.
7. Confirm the selection.

The selected Price Drop Alert will be assigned successfully.

Manage Leads Assigned to a Price Drop Alert

View Active Leads

1. Locate the desired Price Drop Alert.
2. Click the **Active Lead Count**.

A pop-up window displays all active leads currently assigned to the selected Price Drop Alert.

Pause Active Leads

1. Click the **Active Lead Count** for the desired Price Drop Alert.
2. Select the checkbox next to the lead or leads you want to pause.
3. Click **Pause**.

4. Review the confirmation message.
5. Click **Confirm**.

The selected leads will remain assigned to the Price Drop Alert but will temporarily stop receiving alert notifications.

View Paused Leads

1. Click the **Paused Lead Count** for the desired Price Drop Alert.

A pop-up window displays all leads currently paused for the selected Price Drop Alert.

Resume Paused Leads

1. Click the **Paused Lead Count** for the desired Price Drop Alert.
2. Select the checkbox next to the lead or leads you want to resume.
3. Click **Resume**.
4. Review the confirmation message.
5. Click **Confirm**.

The selected leads will resume receiving Price Drop Alert notifications according to the configured alert schedule.

Remove Leads from a Price Drop Alert

1. Click the **Active Lead Count** for the desired Price Drop Alert.
2. Select the checkbox next to the lead or leads you want to remove.
3. Click **Remove**.
4. Review the confirmation message.
5. Click **Confirm**.

The selected leads will be removed from the Price Drop Alert and will no longer receive notifications associated with that alert.

> **Important Notes**
>
> - Multiple leads can be selected and managed simultaneously.
> - Paused leads remain assigned to the Price Drop Alert.
> - Removed leads are no longer associated with the Price Drop Alert.
> - Active and paused lead counts update automatically after changes.

Manage Price Drop Alerts from a Lead Profile

Pause a Price Drop Alert

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Locate the **Price Drop Alert** section.
5. Click **Pause** next to the desired alert.
6. Review the confirmation message.
7. Click **Confirm**.

The Price Drop Alert will be paused successfully and the lead will temporarily stop receiving Price Drop Alert notifications.

Resume a Price Drop Alert

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Locate the paused Price Drop Alert.
5. Click **Resume**.
6. Review the confirmation message.
7. Click **Confirm**.

The Price Drop Alert will be reactivated successfully and the lead will begin receiving notifications again according to the configured schedule.

Remove a Price Drop Alert from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Locate the **Price Drop Alert** section.
5. Click **Delete** next to the desired alert.
6. Review the confirmation message.
7. Click **Confirm**.

The Price Drop Alert will be removed successfully from the lead profile.

How and When Are Price Drop Alerts Executed?

Price Drop Alerts are processed according to the configured alert frequency.

Alert emails are generated and delivered between **9:00 AM and 10:00 AM** on the scheduled execution date.

> **Note**
>
> If a lead does not open up to 10 consecutive Price Drop Alert emails, AgentRoof CRM automatically stops sending additional Price Drop Alert emails to that lead. This helps maintain email deliverability and reduces the likelihood of messages being marked as spam.

Conclusion

You have successfully learned how to create, edit, delete, assign, pause, resume, and manage Price Drop Alerts in AgentRoof CRM.