

Lead Engagement Alert

What Are Lead Engagement Alerts?

Lead Engagement Alerts help you stay informed about how your leads interact with your website, emails, and SMS communications.

AgentRoof CRM provides comprehensive options to track lead engagement across your website, emails, and SMS. You can choose to be notified when leads become active after a set number of hours or days, when they interact with properties, or when they perform actions such as subscribing to listing alerts. You can also track email and SMS engagement, such as when a lead clicks a link, unsubscribes, or replies.

Notifications can be delivered through the AgentRoof application, email, or both, depending on the alert type.

Access Lead Engagement Alerts

1. From the left-hand menu, click **Automation**.
2. Select **Lead Engagement Alerts**.

The Lead Engagement Alerts page will be displayed.

“ **Note:** Some engagement alerts are system defaults and cannot be modified.

Enable or Disable Lead Engagement Alerts

A toggle switch is available at the top of the Lead Engagement Alerts page.

- Turn the toggle **On** to enable Lead Engagement Alerts.
- Turn the toggle **Off** to disable all Lead Engagement Alerts.

When disabled, no lead engagement notifications will be sent regardless of the individual alert settings configured below.

Click **Update** to save the changes.

Website Engagement Alerts

Notify When a Lead Becomes Active After Selected Hours

Receive a notification when a lead becomes active after a specified number of hours.

- Minimum value: 1 hour
- Maximum value: 23 hours

Select how you would like to receive the notification:

- App Notification
- Email Notification

Notify When a Lead Becomes Active After Selected Days

Receive a notification when a lead becomes active after a specified number of days.

- Minimum value: 1 day
- Maximum value: 364 days

Select the desired notification method.

Notify When a Lead Becomes Inactive

Receive a notification when a lead becomes inactive for a specified number of days.

- Minimum value: 7 days
- Maximum value: 99 days

Select the desired notification method.

Notify When a Lead Views the Same Property Multiple Times

Receive a notification when a lead views the same property repeatedly.

- Minimum value: 2 views
- Maximum value: 99 views

Select the desired notification method.

Notify When a Lead Views Multiple Different Properties

Receive a notification when a lead views more than a specified number of different properties.

- Minimum value: 2 properties
- Maximum value: 99 properties

Select the desired notification method.

Notify When a Lead Subscribes to a Listing Alert

Receive a notification whenever a lead subscribes to a Listing Alert.

“ **Note:** This is a default system notification. The App and Email notification options cannot be modified.

Email Engagement Alerts

Use the checkboxes next to each alert to choose whether notifications should be sent through the App, Email, or both.

Available Email Engagement Notifications

- Notify me when a lead clicks a link in an email.
- Notify me when a lead opens an email.
- Notify me when a lead unsubscribes from email communications.
- Notify me when a lead replies to an email.

“ **Note:** The notification for lead email replies is enabled by default.

SMS Engagement Alerts

Notify When a Lead Replies to an SMS

Receive a notification whenever a lead replies to an SMS message.

“ **Note:** This notification is enabled by default.

Save Changes

After making any changes to the notification settings:

1. Click **Update**.

The Lead Engagement Alert settings will be updated successfully.

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

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