

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.

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