

# 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.

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## 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.

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## 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.

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## 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.

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