

# Market Updates

## What Are Market Updates?

Market Updates help keep your leads informed about current real estate market trends and activity in their area.

These updates are automatically sent to assigned leads and provide valuable market information, helping agents stay connected with their audience through regular communication.

## Access Market Updates

1. From the left-hand menu, click **Automation**.
2. Select **Market Updates**.

The Market Updates page will be displayed.

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## Market Update Details

The Market Updates page displays information including:

- Active
- Paused
- Frequency
- Run On
- Next Email Date
- Assigned Tags
- Assigned Stages
- Assigned Sources
- Actions

These details help you track Market Update schedules and assignments.

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## View Market Updates

1. Navigate to **Automation > Market Updates**.
2. Locate the desired Market Update.
3. Click the **View** button.

You can view the selected Market Update.

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## View Active Leads

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

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

2. Select one or more leads.
3. Choose one of the following actions:
  - **Pause** – Temporarily stop sending Market Updates to the selected leads.
  - **Delete** – Remove the Market Update from the selected leads.

## View Paused Leads

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

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

2. Select one or more leads.
3. Choose one of the following actions:
  - **Resume** - Reactivate the Market Update for the selected leads.
  - **Delete** - Remove the Market Update from the selected leads.

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## Assign a Market Update

Market Updates can be assigned through the Market Updates page or directly from a Lead Profile.

### Assign from the Market Updates Page

1. Select the desired Market Update.
2. Click **Assign**.

You can assign the Market Update 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 Market Update 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 Market Update 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 Market Update 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 using the checkboxes.
3. Click **More** from the top menu.
4. Click **Market Updates**.
5. Select the desired Market Update.
6. Click **Submit**.

The Market Update will be assigned successfully.

## Assign from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **Market Updates** section.
4. Click **Add**.
5. Select the desired Market Update.

6. Click **Submit**.

The Market Update will be assigned successfully.

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## Market Update Execution

Market Updates are processed automatically at **7:30 AM**.

Currently, Market Updates are scheduled to run **monthly on the 10th of each month**.

## Important Notes

- Market Updates cannot be created manually.
- Existing Market Updates cannot be deleted.
- Market Updates can only be viewed and assigned to leads, tags, stages, or sources.
- Lead assignments can be managed by pausing, resuming, or removing the Market Update from individual leads.

You have successfully learned how to manage Market Updates in AgentRoof CRM.

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