

My Realtors

What Is a Brokerage?

A Brokerage account allows brokers to manage and collaborate with realtors within AgentRoof CRM.

Brokerages can manage their own leads, assign leads to realtors, and control how new leads are distributed among realtors.

The My Realtors section allows brokerages to add realtors, manage realtor relationships, configure lead transfer settings, and monitor assigned leads.

Access My Realtors

1. Log in to your Brokerage account.
2. From the left-hand menu, click **My Realtors**.

The My Realtors page displays all realtors associated with the brokerage.

From this page, you can view:

- Realtor Name
 - Email Address
 - Website
 - Assigned Leads
 - Source
 - Available Actions
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Add a Realtor

1. Navigate to **My Realtors**.
2. Click **Add Realtor**.
3. Select one or more realtors.
4. Click **Submit**.

An invitation will be sent to the selected realtor(s).

Invitation Status

After the invitation is sent, the Actions column will display **Request Sent**.

Once the realtor accepts the invitation, their status becomes active and they will appear as an active realtor under the brokerage.

Configure Lead Transfer

Lead Transfer controls how new leads are assigned to realtors.

1. Navigate to **My Realtors**.
2. Click **Lead Transfer**.

You can choose one of the following options:

Manual Assignment

New leads are not assigned automatically.

The brokerage must manually assign leads to realtors.

Automatic Assignment

New leads are assigned automatically to realtors.

Round Robin Distribution

Round Robin distributes new leads evenly among active realtors.

For example:

3 realtors Realtor A, Realtor B & Realtor C are connected with the brokerage, then the leads 1 to 5 will be assigned as follows,

Lead 1 → Realtor A
Lead 2 → Realtor B
Lead 3 → Realtor C
Lead 4 → Realtor A
Lead 5 → Realtor B

This process continues in sequence to ensure fair lead distribution.

Click **Save** after selecting the desired lead transfer method.

Assign Sources to a Realtor

Sources can be assigned to realtors to automatically direct leads from selected sources to the assigned realtor.

1. Navigate to **My Realtors**.
2. Select the desired realtor.
3. Click **Assign Source**.
4. Select one or more sources.
5. Click **Apply**.

The selected sources will be assigned to the realtor successfully.

For example:

Realtor A & B got assigned to the source "Website" and Realtor C got assigned with the source "Facebook". Assume that the leads are coming in the order such as Leads 1 & 2 from website, Lead 3 from Facebook, Lead 4, 5 & 6 from website, then the leads will distributed as follows

Lead 1 → Realtor A
Lead 2 → Realtor B
Lead 3 → Realtor C
Lead 4 → Realtor A
Lead 5 → Realtor B
Lead 6 → Realtor A

View Leads Assigned to a Realtor

1. Navigate to **My Realtors**.
2. Locate the desired realtor.
3. Click **View** in the Actions column.

The list of leads assigned to the selected realtor will be displayed.

Remove a Realtor

1. Navigate to **My Realtors**.
2. Locate the desired realtor.
3. Click **Delete** in the Actions column.
4. Confirm the deletion.

The realtor will be removed from the brokerage successfully.

You have successfully learned how to manage Realtors in AgentRoof CRM.

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