

# Neighborhood Alert

## What is a Neighbourhood Alert?

The Neighbourhood Alert feature allows you to send sold listing alerts to your leads based on specific criteria such as City, Property Type, Price Range, Bedrooms, Bathrooms, and more.

You can configure the alert frequency and assign alerts to Tags, Stages, Sources, or individual leads. Once configured, email notifications are automatically sent whenever a property matching the selected criteria is sold, helping your leads stay informed about activity in their neighbourhood.

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## Create a Neighbourhood Alert

1. Navigate to the **Alerts** page.
2. Click **Neighbourhood Alert**.
3. Click the + icon in the Neighbourhood Alerts row.

## Complete the Required Fields

1. Enter the name of the alert.
2. Select the area.
3. Select the property category.
4. Select the building type.
5. Select the building style.
6. Select the property status.
7. Select the basement option.
8. Select the garage space requirement.
9. Select the square footage range.
10. Select the sold period (in months).
11. Select the alert frequency.
12. Enter the number of properties to send. A maximum of 10 properties can be included in a single alert.
13. Enter the number of bedrooms.
14. Enter the number of bathrooms.
15. Specify the price range between \$0 and \$5,000,000.
16. Click **Create Alert**.

The new Neighbourhood Alert will be created successfully.

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## Edit a Neighbourhood Alert

Neighbourhood Alerts can be edited from either the Neighbourhood Alerts page or directly from a lead's profile.

### Edit from the Neighbourhood Alerts Page

1. Locate the Neighbourhood Alert you want to modify.
2. Click **Edit** under the Actions column.
3. Update the required criteria and settings.
4. Click **Update Alert**.

The changes will be saved successfully.

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### Edit from the Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Scroll down to the **Neighbourhood Alert** section.
5. Click the **Edit** icon next to the desired alert.

“ **Note:** If the alert is labelled **Self**, it was originally created by the lead through the website.

6. Review the confirmation message and click **Continue**.
7. Update the required criteria and settings.
8. Click **Update Alert**.

“ **Note:** Editing a lead-created alert may override the lead's original preferences. Once the changes are saved, ownership of the alert will change from **Self** to **Agent**.

The changes will be saved successfully.

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## Delete a Neighbourhood Alert

1. Select the checkbox next to the Neighbourhood Alert you want to delete.
2. Click the **Delete** icon from the Neighbourhood Alerts row.
3. Review the confirmation message.
4. Click **Confirm**.

The selected Neighbourhood Alert will be deleted successfully.

“ **Note:** Neighbourhood Alerts that are currently assigned to active leads cannot be deleted.

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## Assign a Neighbourhood Alert

Neighbourhood Alerts can be assigned from multiple locations within AgentRoof CRM.

### Assign from the Neighbourhood Alert Page

1. Select the checkbox next to the desired Neighbourhood Alert.

## Assign to Leads

1. Hover over the **Lead** icon.
2. Click **Assign to Lead**.
3. Search for and select the desired leads.
4. Click **Assign**.

You can assign the alert to multiple leads.

## Assign to Tags

1. Hover over the **Tag** icon.
2. Click **Assign to Tag**.
3. Select one or more tags.
4. Click **Assign**.

## Assign to Stages

1. Hover over the **Stage** icon.
2. Click **Assign to Stage**.
3. Select one or more stages.
4. Click **Assign**.

## Assign to Sources

1. Hover over the **Source** icon.
2. Click **Assign to Source**.
3. Select one or more sources.
4. Click **Assign**.

“ **Note:** If the required Tag, Stage, or Source is not available, you can create a new one directly from the assignment window before completing the assignment.

The selected Neighbourhood Alert will be assigned successfully.

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## Assign from the CRM Page

1. Navigate to **CRM**.
2. Select the checkbox next to the desired lead.
3. Click **Neighbourhood Alert** from the action bar.
4. Select the Neighbourhood Alert you want to assign.
5. Click **Assign**.

The selected Neighbourhood Alert will be assigned successfully.

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## Assign from the Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Scroll to the **Neighbourhood Alert** section.
5. Click the **+** icon.
6. Select the desired Neighbourhood Alert.
7. Confirm the selection.

The selected Neighbourhood Alert will be assigned successfully.

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## Manage Leads Assigned to a Neighbourhood Alert

### View Active Leads

1. Locate the desired Neighbourhood Alert.
2. Click the **Active Lead Count**.

A pop-up window displays all active leads currently assigned to the selected Neighbourhood Alert.

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### Pause Active Leads

1. Click the **Active Lead Count** for the desired Neighbourhood Alert.
2. Select the checkbox next to the lead or leads you want to pause.
3. Click **Pause**.
4. Review the confirmation message.
5. Click **Confirm**.

The selected leads will remain assigned to the Neighbourhood Alert but will temporarily stop receiving alert notifications.

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### View Paused Leads

1. Click the **Paused Lead Count** for the desired Neighbourhood Alert.

A pop-up window displays all leads currently paused for the selected Neighbourhood Alert.

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### Resume Paused Leads

1. Click the **Paused Lead Count** for the desired Neighbourhood Alert.
2. Select the checkbox next to the lead or leads you want to resume.

3. Click **Resume**.
4. Review the confirmation message.
5. Click **Confirm**.

The selected leads will resume receiving Neighbourhood Alert notifications based on the configured alert schedule.

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## Remove Leads from a Neighbourhood Alert

1. Click the **Active Lead Count** for the desired Neighbourhood Alert.
2. Select the checkbox next to the lead or leads you want to remove.
3. Click **Remove**.
4. Review the confirmation message.
5. Click **Confirm**.

The selected leads will be removed from the Neighbourhood Alert and will no longer receive notifications associated with that alert.

### “ Important Notes

- Multiple leads can be selected and managed simultaneously.
- Paused leads remain assigned to the Neighbourhood Alert.
- Removed leads are no longer associated with the Neighbourhood Alert.
- Active and paused lead counts update automatically after changes.

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## Manage Neighbourhood Alerts from a Lead Profile

### Pause a Neighbourhood Alert

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Locate the **Neighbourhood Alert** section.
5. Click **Pause** next to the desired alert.
6. Review the confirmation message.
7. Click **Confirm**.

The Neighbourhood Alert will be paused successfully and the lead will temporarily stop receiving notifications from that alert.

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### Resume a Neighbourhood Alert

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Locate the paused Neighbourhood Alert.
5. Click **Resume**.
6. Review the confirmation message.
7. Click **Confirm**.

The Neighbourhood Alert will be reactivated successfully and the lead will begin receiving notifications again according to the configured schedule.

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## Remove a Neighbourhood Alert from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Locate the **Neighbourhood Alert** section.
5. Click **Delete** next to the desired alert.
6. Review the confirmation message.
7. Click **Confirm**.

The Neighbourhood Alert will be removed successfully from the lead profile.

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## How and When Are Neighbourhood Alerts Executed?

Neighbourhood Alerts are processed according to the configured alert frequency.

Alert emails are generated and delivered between **9:00 AM and 10:00 AM** on the scheduled execution date.

### “ Important Note

If a lead does not open up to 10 consecutive Neighbourhood Alert emails, AgentRoof CRM automatically stops sending additional Neighbourhood Alert emails to that lead. This helps maintain email deliverability and reduces the likelihood of messages being marked as spam.

## Conclusion

You have successfully learned how to create, edit, delete, assign, pause, resume, and manage Neighbourhood Alerts in AgentRoof CRM.

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