New Lisiting Alerts

What is a New Listing Alert?

The **New Listing Alert** feature allows you to automatically notify leads about newly listed properties that match their preferences.

Alerts can be configured using various property criteria, including location, property details, pricing, and other listing preferences. You can choose how often alerts are sent and assign them to individual leads, tags, stages, or sources.

Once configured, email alerts will be sent whenever matching properties become available, helping keep your leads informed about the latest listings.

Access New Listing Alerts

1. From the left-hand menu, click **Alerts**.
2. Select **New Listing Alerts**.

The New Listing Alerts page will be displayed.

This page provides a centralized view of all listing alerts configured in your CRM. From here, you can monitor alert assignments, view active and paused leads, and perform actions such as creating, editing, assigning, or deleting alerts.

You can also click the numbers displayed under the **Active** and **Paused** columns to view and manage the leads assigned to a particular alert.

Create a New Listing Alert

1. Navigate to the **New Listing Alerts** page.
2. Click **+ Add New Listing Alert**.

A popup window will appear prompting you to enter the alert details.

3. Enter an **Alert Name**.
4. Select one or more **Areas or Cities**.
5. Choose the **Property Category**.
6. Select the **Building Type**.
7. Select the **Building Style**.
8. Specify the **Property Status**.
9. Select the preferred **Basement Type**.

10. Enter the required **Garage Spaces**.
11. Specify the **Square Footage** requirements.
12. Enter the preferred **Days on Market**.
13. Select the **Alert Frequency**.
14. Specify the **Number of Properties** to include in each alert.
15. Define the **Bedroom Requirements**.
16. Define the **Bathroom Requirements**.
17. Enter the desired **Price Range**.
18. Click **Create Alert**.

The listing alert will be created successfully.

Edit a Listing Alert

1. Navigate to the **New Listing Alerts** page.
2. Locate the alert you want to modify.
3. Click **Edit**.
4. Make the required changes.
5. Click **Update Alert**.

The alert will be updated successfully.

Edit a New Listing Alert from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead.
3. Select the **Profile** tab.
4. Scroll down to the **New Listing Alerts** section.
5. Locate the alert you want to edit.
6. Review the ownership label displayed for the alert:
   - **Self** – The alert was created and is managed by the lead.
   - **Agent** – The alert is managed by the realtor.
7. Click **Edit**.
8. If the alert is marked as **Self**, a confirmation message will appear indicating that ownership of the alert will be transferred from **Self** to **Agent**.
9. Click **Confirm** to continue.
10. Update the desired alert settings.
11. Click **Update Alert**.

The alert will be updated successfully.

Note: Editing a Self-managed alert transfers ownership of the alert from the lead to the realtor. After the transfer, the ownership label will be displayed as **Agent**.

View Leads Assigned to a Listing Alert

1. Navigate to the **New Listing Alerts** page.
2. Locate the desired listing alert.
3. Click the number displayed in the **Active** column to view active leads.
4. Click the number displayed in the **Paused** column to view paused leads.

The corresponding list of assigned leads will be displayed.

Manage Active Lead Assignments

1. Click the number displayed in the **Active** column.
2. Select one or more leads from the list.
3. Choose one of the following actions:

- **Pause** – Temporarily stop sending the alert to the selected leads.
- **Remove** – Remove the alert from the selected leads.

The selected action will be applied successfully.

Manage Paused Lead Assignments

1. Click the number displayed in the **Paused** column.
2. Select one or more leads from the list.
3. Choose one of the following actions:
    - **Resume** – Reactivate the alert for the selected leads.
    - **Remove** – Remove the alert from the selected leads.

The selected action will be applied successfully.

Manage Listing Alert Status from a Lead Profile

You can also pause or resume a New Listing Alert directly from a lead profile.

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **New Listing Alerts** section.
4. Find the alert you want to manage.

Pause a Listing Alert

1. Click **Pause** next to the alert.
2. A confirmation message will appear.
3. Click **Confirm**.

The alert will be paused for the selected lead, and no further listing alert emails will be sent until it is resumed.

Resume a Listing Alert

1. Click **Resume** next to the paused alert.
2. A confirmation message will appear.
3. Click **Confirm**.

The alert will be reactivated and will continue sending matching listing alerts to the lead.

Assign a Listing Alert

Listing alerts can be assigned from multiple locations within AgentRoof CRM.

Assign from the Alerts Page

1. Navigate to **New Listing Alerts**.
2. Select the desired listing alert.
3. Click **Assign**.

You can assign the alert 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 alert 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 alert 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 alert 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.
3. Click M**ore** from the top menu.
4. Click **New Listing Alert.**
5. Select the desired alert.
6. Click **Apply**.

The alert will be assigned successfully.

Assign from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **New Listing Alerts** section.
4. Click **Add Alert**.
5. Select the desired listing alert.
6. Click **Submit**.

The alert will be assigned successfully.

Remove a Listing Alert from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **New Listing Alerts** section.
4. Find the alert you want to remove.
5. Click **Delete**.
6. Confirm the removal if prompted.

The listing alert will be removed successfully from the lead.

Note: This action only removes the alert assignment from the lead profile. The New Listing Alert itself will remain available in the CRM. To permanently delete a New Listing Alert, it must be removed from all assigned leads and then deleted from the **New Listing Alerts** page.

Delete a Listing Alert

1. Navigate to the **New Listing Alerts** page.
2. Select the checkbox next to the alert you want to delete.
3. Click **Delete** from the top menu.
4. Confirm the deletion.

> **Note:** Listing alerts that are currently assigned to one or more leads cannot be deleted. Remove the alert assignment from all associated leads before attempting to delete the alert.

The selected listing alert will be deleted successfully.

Alert Execution

Listing alerts are processed automatically each day between **9:00 AM and 10:00 AM**.

Matching property listings will be sent to assigned leads according to the selected alert frequency.

Important Notes

- If a lead does not open up to 10 consecutive listing alert emails, the alert will automatically stop sending to that lead. This helps protect email deliverability and reduces the likelihood of emails being marked as spam.
- Listing alerts assigned to leads cannot be deleted until they have been removed from all associated leads.

You have successfully learned how to manage New Listing Alerts in AgentRoof CRM.

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