

Realestate News

What Are Real Estate Newsletters?

Real Estate Newsletters help keep your leads informed with regular real estate content and updates.

These newsletters are automatically sent to assigned leads based on a predefined schedule and help agents stay connected with their audience through ongoing communication.

Access Real Estate Newsletters

1. Log in to AgentRoof CRM.
2. From the left-hand menu, click **Automation**.
3. Select **Real Estate Newsletters**.

The Real Estate Newsletters page displays information such as:

- Newsletter Name
 - Active Leads
 - Paused Leads
 - Frequency
 - Run On
 - Next Email On
 - Assigned Tags
 - Assigned Stages
 - Assigned Source
 - Actions
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View a Newsletter Preview

1. Navigate to **Automation > Real Estate Newsletters**.
2. Locate the desired newsletter.
3. Click **View** in the Actions column.

The newsletter preview will be displayed.

Important Notes

- Real Estate Newsletters are system-managed.
- Newsletters cannot be created manually.

- Newsletters cannot be deleted.
 - Newsletters can only be viewed and assigned to leads, tags, stages, or sources.
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View Active Leads

1. Navigate to **Automation > Real Estate Newsletters**.
2. Locate the desired newsletter.
3. Click the number displayed in the **Active** column.

A list of active leads assigned to the newsletter will be displayed.

Manage Active Leads

1. Select one or more leads.
2. Choose one of the following actions:
 - **Pause** - Temporarily stop sending the newsletter to the selected leads.
 - **Delete**- Remove the newsletter from the selected leads.

The selected action will be applied successfully.

View Paused Leads

1. Navigate to **Automation > Real Estate Newsletters**.
2. Locate the desired newsletter.
3. Click the number displayed in the **Paused** column.

A list of paused leads assigned to the newsletter will be displayed.

Manage Paused Leads

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

The selected action will be applied successfully.

Assign a Real Estate Newsletter

Real Estate Newsletters can be assigned through the Real Estate Newsletters page, the CRM page, or directly from a Lead Profile.

Assign from the Real Estate Newsletters Page

1. Navigate to **Automation > Real Estate Newsletters**.

2. Select the desired newsletter.

Assign to Leads

1. Click **Leads**.
2. Select one or more leads.
3. Click **Submit**.

The newsletter will be assigned successfully.

Assign to Tags

1. Click **Tags**.
2. Select one or more tags.
3. Click **Apply**.

The newsletter 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 newsletter 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 newsletter 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 **More** from the top menu.
4. Click **Newsletter**.
5. Select the desired newsletter.
6. Click **Submit**.

The newsletter will be assigned successfully.

Assign from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Locate the **Newsletters** section.
4. Click **Add**.
5. Select the desired newsletter.
6. Click **Submit**.

The newsletter will be assigned successfully.

Newsletter Execution

Real Estate Newsletters are processed automatically at **7:30 AM**.

Currently, newsletters are scheduled to run **biweekly**, on the **first and third Friday of each month**.

Matching newsletter content will be delivered automatically to all assigned leads according to the configured schedule.

You have successfully learned how to manage Real Estate Newsletters in AgentRoof CRM.

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