

5. Brokerage

Brokerage Module — Manage broker companies and their agents, track broker leads, requests, and CILs, log broker activities, handle broker contracts, and monitor broker performance reports.

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Brokerage Module — Overview

Overview

The **Brokerage Module** manages broker companies and their agents, tracks broker-submitted leads and CILs, and handles broker contracts and activities.

Module Sections

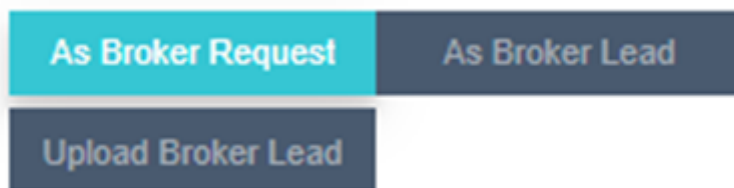
Section	Description
Add Broker Request / Lead	Add a new broker request or broker lead into the system.
Broker CILs	View and manage CILs (Client Information Letters) submitted by broker companies.
Active Brokers	List of all active broker companies.
Pending / Blocked Brokers	Broker companies pending approval or blocked from the system.
Send Mail	Send bulk emails to broker companies.
Activities Management	Track and manage activities with broker companies.
Upload Brokers	Bulk import broker companies via Excel.
Broker Contract	Manage and download broker contracts.

Add Broker Request / Lead

Overview

When adding from the Brokerage module, you have two options:

- **As Broker Request** — A request submitted by a broker company for a specific unit type (e.g., "4-bedroom duplex"). This is not a regular lead — it comes with a specific property requirement.
- **As Broker Lead** — A standard lead that comes through a broker company and enters the CRM normally.
- **Upload Broker Lead** — Bulk import broker leads via Excel file.



Broker Request vs Broker Lead

	Broker Request	Broker Lead
What it is	A property inquiry from a broker company for a specific unit	A regular lead referred by a broker
Fields	Different from standard lead fields — includes property requirements	Similar to standard lead fields
Lead ID	Uses a special static source called "Brokers" — the Lead ID only appears in Brokerage tabs, not in the standard Add Lead screen	Standard Lead ID

How to Add a Broker Request / Lead

1. Go to **Brokerage Module** → **Add Broker Request / Lead**.
2. Choose: **As Broker Request** or **As Broker Lead**.
3. Fill in the required fields:

Field	Required	Description
Brokerage Company	<input type="checkbox"/>	Select the broker company.
Broker Agent	Optional	Select the agent within that company.
Assign To	<input type="checkbox"/>	Assign to a salesman.
State	Optional	Select the lead state.
Leads ID	<input type="checkbox"/>	Select the Lead ID for this broker request/lead. The Lead ID must be created under the Brokers source in the Marketing Module — this is a static source dedicated to broker leads. Lead IDs from other sources will not appear here. To create one: go to Marketing → Lead IDs → Add New → set Source to "Brokers" → save.

Brokerage Company *

SELECT

Broker Agent

Select

Assign To *

Select

State

Select

Leads ID

SELECT

Upload Broker Lead

Works the same as the standard Upload Leads feature, with one additional required field:

Extra Field	Description
-------------	-------------

Broker Company ID

The ID of the broker company. Get this from the broker's profile in Active Brokers.

“📄 To find the Broker Company ID, go to **Active Brokers** → open the broker's profile → copy the ID.

Adding Custom Fields to the Broker Request Form

1. Go to **Setup** → **Fields Setup**.
2. Click **Add New**.
3. Set **Broker Request** option to **True**.
4. Configure: Field Name, Data Type, Set as Unique if needed.
5. **Save** — the field will appear on the Broker Request form.

Broker CILs

Overview

Broker CILs (Client Information Letters) are submitted by broker companies through their own CRM login. This tab shows all CILs received from brokers.

BROKER CILS All

Search...

Name	Salesman	Phone	Email	Date	Broker	User	Actions
test	Admin	201094489113	QGzUjdpEV4@nomail.com.net	2026-06-07 17:18:41	koo	koo	<input type="button" value="REJECT"/>
Quick Broker		201094489116	9dCEO4phiK@nomail.com.net	2026-03-11 12:04:26	Pepperstone	Admin	<input type="button" value="REJECT"/>
Unit Space		201123456112	bWzVnGTa8S@nomail.com.edu	2026-03-10 13:52:53	IC Markets	Admin	<input type="button" value="CONVERT TO LEAD"/> <input type="button" value="REJECT"/>
hany hani	Admin	201005060208	abc@abc.cz	2026-01-17 00:14:33	Ally Invest	Admin	
test cil	Sales Agent	201002030405	admin@dotshub.netfgfg	2025-11-17 13:50:21	amir real estate	Admin	<input type="button" value="REJECT"/>
Eslam		201127182052	T3Z7PMXq9F@nomail.com.org	2025-09-15 18:42:02	Kofiii	Kofiii	<input type="button" value="REJECT"/>

How It Works

1. A broker company has a profile in the system and can **log in to the CRM**.
2. They submit CILs for clients they are bringing to you.
3. The CIL appears in this tab for review.

Broker CILs List

Column	Description
Name	Client name on the CIL.
Salesman	Salesman assigned (if converted).
Phone	Client phone number.
Email	Client email address.

Column	Description
Date	Date the CIL was submitted.
Broker	The broker company that submitted the CIL.
User	The user who processed the CIL.
Actions	Convert to Lead or Reject.

Converting a CIL to a Lead

1. Review the CIL details.
2. Click **Convert to Lead**.
3. Select the **salesman** to assign the lead to.
4. The salesman must be linked to the broker company — otherwise they won't appear in the dropdown.
5. Confirm — the CIL becomes a lead in the salesman's pipeline.

“ ⚠ If the CIL shows **Reject** instead of Convert to Lead, it means the lead already exists in the system as a duplicate. Check the Duplicated Leads section.

Filters

Filter	Description
Date	Filter by submission date (From / To).
Broker	Filter by broker company.
Broker Agents	Filter by specific broker agent.

Adding Custom Fields to the CIL Form

1. Go to **Setup** → **Fields Setup**.
2. Click **Add New**.

3. Set **CIL** option to **True**.
 4. Configure: Field Name, Data Type, Set as Unique if needed.
 5. **Save** — the field will appear on the CIL form.
-

Adding a CIL Manually

You can also add a CIL manually by clicking **Add New** in this tab and filling in the client details.

Active Brokers

Overview

The **Active Brokers** tab shows all broker companies currently active in the system.

Brokers Leads Search...

Filters

NUMBER OF BROKERS : 99 Search...

<input type="checkbox"/>	broker name	Authorized Name	Mobile	Indirect Sales	Total Agents	Creation date	Didn't Add Lead Since	Actions
<input type="checkbox"/>	Aily Invest	Aily Invest	201539016314	Sales Agent & 2 Others	0	2025-08-31	2026-01-17 5 Month 11 Days	...
<input type="checkbox"/>	Alpari	Alpari	201007841914	Sales Agent	0	2025-08-31	---:--- 0 Month 0 Days	...
<input type="checkbox"/>	amir real estate	hamdy	01005060708	Admin & 1 Others	1	2025-11-17	2025-11-17 7 Month 12 Days	...
<input type="checkbox"/>	AvaOptions	AvaOptions	201193768724	Admin	0	2025-08-31	---:--- 0 Month 0 Days	...
<input type="checkbox"/>	AvaTrade	AvaTrade	201173377814	Sales Agent	0	2025-08-31	---:--- 0 Month 0 Days	...
<input type="checkbox"/>	Axi	Axi	201513713911	Admin	0	2025-08-31	2025-12-01 6 Month 28 Days	...
<input type="checkbox"/>	BUX	BUX	201187760591	Sales Agent	0	2025-08-31	---:--- 0 Month 0 Days	...

Brokers List

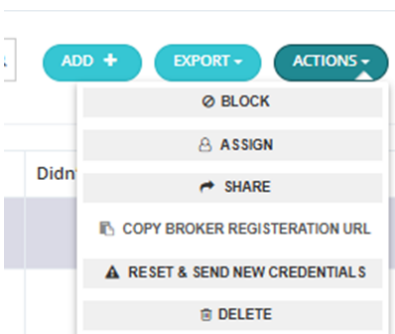
Column	Description
Broker Name	The broker company name.
Authorized Name	The authorized representative's name.
Mobile	Contact number.
Indirect Sales	Which salesmen are assigned as indirect sales for this broker.
Total Agents	Number of broker agents under this company.
Creation Date	When this broker was added to the system.
Didn't Add Lead Since	How long since this broker submitted a lead — useful for identifying inactive brokers.

Column	Description
Actions	Options menu (⋮).

Available Actions

From the **Actions** dropdown (top right) or the (⋮) menu on each row:

Action	Description
Block	Block the broker from submitting new leads or CILs.
Assign	Assign a salesman to this broker.
Share	Share broker information.
Copy Broker Registration URL	Copies a registration link to send to the broker company. When the broker opens the link, they fill in their own data directly — no need for you to enter it manually. The registration form includes: Type, Company Name, Authorized Name, Authorized ID Number, CRN, Tax Card, Mobile, Email, Address, Description, Files (e.g., tax card scan, commercial registration), Land Line, Tag, Co. History, Website/Social Media, Branches, Owners, Sales Team, Administrative Contact Person, Finance Team, and Logo. After submitting, the broker also receives their contract automatically — the system generates it based on whichever contract template is configured in Broker Settings . The broker can then print it, sign it physically, and bring it to the company or upload it back.
Reset & Send New Credentials	Reset the broker's CRM login and send new credentials to their email.
Delete	Remove the broker from the system.
Export	Export the broker list.



Broker Profile

Clicking on a broker company opens their full profile with these tabs:

Tab	Description
Broker Info	Full company details (ID, Type, Name, Authorized Name, CRN, Tax Card, Mobile, Email, Address).
Broker Agents	List of agents working under this company.
Analysis	Performance data for this broker.
Broker History	Log of all interactions and changes.
Broker Activities	Activities logged against this broker.

A **Download Broker Contract** button is available on the profile page.

Brokers Leads Search...

BROKER Show EXPORT CONTRACT

[Broker info](#)
[Broker Agents](#)
[Analysis](#)
[Broker History](#)
[Broker Activities](#)

Broker info EDIT

Broker ID	161
Broker Type	broker
Name	Ally Invest
Authorized Name	Ally Invest
Authorized ID Number	2040317308766
CRN	TRN-TZ-001295
Tax card	N/A
mobile	201539016314
E-mail	allyinvest@allyinvest.com

How to Add a New Broker

Click **Add** and choose:

Add Broker (Company)

Field	Required	Description
Type	<input type="checkbox"/>	Broker type.
Company Name	<input type="checkbox"/>	Official company name.
Authorized Name	Optional	Name of the authorized representative.
Authorized ID Number	Optional	ID number of the authorized rep.
CRN	Optional	Commercial Registration Number.

Field	Required	Description
Tax Card	Optional	Tax card number.
Mobile	<input type="checkbox"/>	Contact number.
Email	<input type="checkbox"/>	Email address (changing this affects login credentials).
Address	Optional	Company address.
Description	Optional	Notes about the company.
Indirect Sale	Optional	Assign indirect sales team members.
Files	Optional	Upload documents.
Land Line	Optional	Landline number.
Tag	Optional	Tags for filtering.
Co. History	Optional	Company history notes.
Website / Social Media	Optional	Online presence links.
Branches	Optional	Branch information.
Owners	Optional	Owner details.
Sales Team	Optional	Assign sales team members.
Administrative Contact Person	Optional	Admin contact details.
Finance Team	Optional	Finance team assignment.
Logo	Optional	Company logo.

Add Broker Agent

Field	Required	Description
Broker	<input type="checkbox"/>	Select the parent broker company.
Name	<input type="checkbox"/>	Agent's full name.
Mobile	<input type="checkbox"/>	Agent's mobile number.
ID	Optional	Agent's ID number.
Bank Account	Optional	Agent's bank account details.

Pending / Blocked Brokers

Overview

This tab shows broker companies that are either **pending approval** or have been **blocked** from the system.

NUMBER OF BROKERS : 1								
<input type="checkbox"/>	broker name	authorized name	Mobile	Indirect Sales	total agents	Creation date	Didn't Add Lead Since	Actions
<input type="checkbox"/>	Alpari	Alpari	201007841914	Sales Agent	0	2025-08-31	0 Month 0 Days	...

Brokers List

Same columns as Active Brokers: Broker Name, Authorized Name, Mobile, Indirect Sales, Total Agents, Creation Date, Didn't Add Lead Since.

Available Actions

Action	Description
Unblock	Reactivate a blocked broker and move them to Active Brokers.
Delete	Permanently remove the broker.
Assign	Assign a salesman to the broker.

Available Filters

Filter	Description
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Indirect Sales	Filter by assigned indirect sales team member.
Broker Creator	Filter by who added the broker.
Type	Filter by broker type.
Creation Date	Filter by when the broker was added (From / To).
Last Update Date	Filter by when the broker record was last updated (From / To).
Didn't Add Lead Since	Filter brokers who haven't submitted leads since a certain date.

Block New Brokers By Default

If the setting **Block New Brokers By Default** is enabled in **Broker Settings**, all newly registered brokers will automatically land in this tab as Pending/Blocked until manually approved.

“ Go to **Settings** → **Broker Settings** to enable or disable this option.

Activities Management

Overview

The **Activities Management** tab lets you log and track activities with broker companies — such as workshops, site visits, orientations, and contract signings.

The screenshot displays the 'Activities Management' interface. At the top, there is a 'Filters' section with dropdown menus for 'Broker', 'Indirect Sale', 'Creators', and 'Activity Types', all currently set to 'NOTHING SELECTED'. Below these are date range inputs for 'Status', 'Creation Date', 'To Do Date', and 'Close Date'. A 'FILTER' button and a 'RESET FILTER' button are located below the date inputs. Below the filters, there is a section for 'ACTIVITIES (20)' with a search bar and buttons for '+ SET ACTIVITY' and 'EXPORT'. The main part of the interface is a table with the following columns: Activity Type, Status, To Do Date, Close Date, Indirect Sale, Broker, Feedback, and Actions. The table contains three rows of activity data.

Activity Type	Status	To Do Date	Close Date	Indirect Sale	Broker	Feedback	Actions
Work Shop	DONE	2025-12-15 12:00:00	2026-02-04 12:00:00	Sales Agent	Evest		[Info] [Edit] [Delete]
Work Shop	IN PROGRESS	2025-12-22 12:00:00		Sales Agent	Evest		[Info] [Edit] [Delete]
Orientation	DONE	2025-12-31 14:02:00	2025-12-31 15:00:00	Admin	Kofiii		[Info] [Edit] [Delete]

Activities List

Column	Description
Activity Type	The type of activity (e.g., Work Shop, Orientation, Site Visit, Contract Sign).
Status	Current status (Done, In Progress, etc.).
To Do Date	Scheduled date for the activity.
Close Date	Date the activity was closed/completed.
Indirect Sale	The salesman associated with this activity.
Broker	The broker company this activity is for.
Feedback	Any feedback recorded for this activity.
Actions	Edit or Delete the activity.

Available Filters

Filter	Description
Broker	Filter by broker company.
Indirect Sale	Filter by assigned salesman.
Creators	Filter by who created the activity.
Activity Types	Filter by activity type.
Status	Filter by activity status.
Creation Date	Filter by when the activity was created (From / To).
To Do Date	Filter by scheduled date (From / To).
Close Date	Filter by completion date (From / To).

How to Set a New Activity








Click **Set Activity** and fill in:

Field	Required	Description
Activity Type	<input type="checkbox"/>	Select the type (e.g., Workshop, Site Visit, Orientation, Contract Sign).
Status	<input type="checkbox"/>	Current status of the activity.
Todo Date	<input type="checkbox"/>	Scheduled date and time.
Reminder Date	<input type="checkbox"/>	When to send a reminder.
Broker	<input type="checkbox"/>	Select the broker company.
Indirect Sale	<input type="checkbox"/>	Select the indirect sales team member.
Feedback	Optional	Notes or feedback about the activity.
Activity Image	Optional	Upload an image related to the activity.
Check-in	Optional	Log a check-in for this activity.

Activity Types Setup

Activity types are configured via **Setup** → **Broker Activity**. Each type has:

- **Order** — Display order.
- **Name** — Type name (e.g., Orientation, Work Shop, Site Visit, Contract Sign).
- **Icon** — Visual icon.
- **Color** — Color label.
- **Image Required** — Whether an image must be uploaded for this activity type.

Order	Name	Icon	Color	Image Required	Actions
1	Orientation			YES	EDIT DELETE
2	Work Shop			NO	EDIT DELETE
3	Site Visit			NO	EDIT DELETE
4	Contract Sign			NO	EDIT DELETE

Brokers Emails

Overview

The **Send Mail** tab allows you to send bulk emails to broker companies.

SEND BROKERS EMAILS

Message*

Upload Emails

Choose File | No file chosen

FILE MUST BE ONE COLUMN CONTAINS ALL CONTACTS YOU NEED TO COMMUNICATE WITH. You can leave it empty and use filter below

Brokers Type

IF NO CATEGORIES SELECTED, A MESSAGE WILL BE SEND TO ALL TYPES OF THE BROKERS.

SEND

How to Send a Broker Email

1. Go to **Brokerage Module** → **Send Mail**.
2. Fill in the **Message** field.
3. Choose recipients:
 - **Upload Emails** — upload a file with one email per row.
 - **OR use the Broker Type filter** to target specific broker types.
4. If no type is selected, the email goes to **all broker types**.
5. Send.

Key Things to Know

- If no category is selected, the message is sent to **all brokers**.
- SMTP must be configured in General Settings for emails to work.

Upload Brokers

Overview

The **Upload Brokers** feature allows you to bulk import broker companies via Excel. It is accessed via **Setup → Broker Upload**.

UPLOAD BROKERS SCRIPTS

Upload Brokers For Assign: when uploading brokers, the CRM will replace the old indirect salesmen with the new assignee.
After upload, if the broker is assigned to users, it will Replace the current users with new users based on the attached sheet.

The screenshot shows a 'File Templates' section with two buttons: 'BROKER TEMPLATE' and 'DOWNLOAD BROKERS FOR ASSIGN'. Below these is a note: 'Fill the files, Remove the first row and save it as CSV "Comma Delemeted"'. Below that is a 'Browse' section with a 'Choose File' button, the text 'No file chosen', and 'Allowed File Types: CSV'. There are two radio buttons: 'Broker' (selected) and 'Upload Brokers For Assign'. A 'SUBMIT' button is at the bottom.

Two Upload Templates

When you open the upload page, two templates are available:

Template	Purpose
Broker Template	For adding new broker companies to the system.
Broker for Assign	For updating the assigned salesman for existing broker companies.

Broker Template — Required Fields

The Excel file must contain the following columns (highlighted in red are required):

Column	Required	Description
Company Name	<input type="checkbox"/>	Official broker company name.

Column	Required	Description
Authorized Name	Optional	Authorized representative name.
Country Code	☐	Phone country code.
Mobile	☐	Contact number.
Email	☐	Email address.
CRN	Optional	Commercial Registration Number.
Address	Optional	Company address.
Descriptions	Optional	Notes about the company.
Type	☐	Broker type.
Salesman	Optional	Salesman name — must match exactly as it appears in the CRM.
Authorized ID Number	Optional	Authorized rep's ID number.
Owner	Optional	Owner name.
Tag	Optional	Tags.
Tax Card	Optional	Tax card number.

“ ⚠ The **Salesman** field must be written exactly as it appears in the CRM — same spelling, capitalization, and spacing. If more than one salesman is assigned, separate names with a comma: `Ahmed ,Mohamed ,Ali`.

Duplication Check

The system checks for duplicate broker companies based on:

- **Mobile**
- **Email**
- **CRN**
- **Tax Card**

If any of these match an existing broker, the row will be **rejected**.

File Format

- After filling in the data, **delete the first row** (the example/header row that comes with the template) before uploading.
 - Save your Excel file as **CSV UTF-8** before uploading.
 - The same applies for the **Broker for Assign** template — delete the first row and save as CSV UTF-8 before uploading.
-

Broker for Assign Template

Used to update which salesman is assigned to existing broker companies. Download the template, update the Salesman column, and re-upload.

Broker Contract

Overview

The **Broker Contract** feature allows you to create contract templates that can be auto-filled with broker company data and downloaded as a Word document.

How It Works

Contracts are built using **Document Words** — placeholder codes that the system replaces automatically with real data from the broker's profile when the contract is generated.

For example, the code `-broker-name-` in the contract template will be replaced with the actual broker company name when downloaded.

Document Words

Available placeholder codes include:

Broker Information Codes:

Field	Code
Broker Type	<code>-Broker_type-</code>
Broker Company Name	<code>-Broker_company_name-</code>
Broker Authorized Name	<code>-Broker_authorized_name-</code>
Broker Authorized ID Number	<code>-Broker_authorized_id_number-</code>
Broker CRN	<code>-Broker_CRN-</code>
Broker Tax Card	<code>-Broker_tax_card-</code>
Broker Mobile	<code>-Broker_mobile-</code>
Broker Email	<code>-Broker_email-</code>
Broker Address	<code>-Broker_address-</code>

Field	Code
Broker Description	-Broker_description-
Broker Indirect Sale	-Broker_indirect_sale-
Broker Land Line	-Broker_land_line-
Broker Tag	-Broker_tag-
Broker Co. History	-Broker_co_history-
Broker Website / Social Media	-Broker_website-
Broker Branches	-Broker_branches-
Broker Owners	-Broker_owners-
Broker Sales Team	-Broker_sales_team-
Broker Administrative Contact Person	-Broker_administrative-
Broker Finance Team	-Broker_finance_team-

Code	Description
-broker-name-	Broker company name.
-payments-	Payment methods.
-payments_list-	List of payments.
-reservation_fees-	Reservation fees amount.
-total_paid-	Total amount paid.
-total_remaining-	Total remaining amount.
-total_amount-	Total contract amount.
-maintenance-	Maintenance fees.

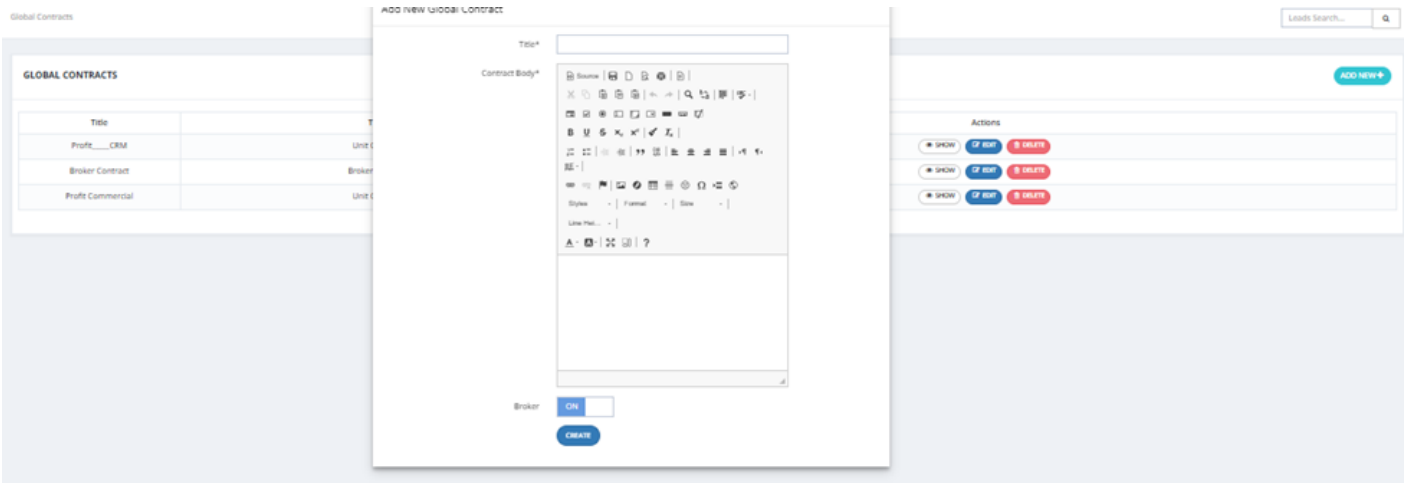
And many more — view the full list in **Setup → Global Contracts → Document Words**.

How to Create a Broker Contract Template

1. Go to **Setup → Global Contracts**.
2. Click **Add New**.
3. Fill in:
 - **Title** — Contract name (e.g., "Broker Contract 2025").
 - **Contract Body** — Write the contract text and insert placeholder codes where dynamic data should appear.

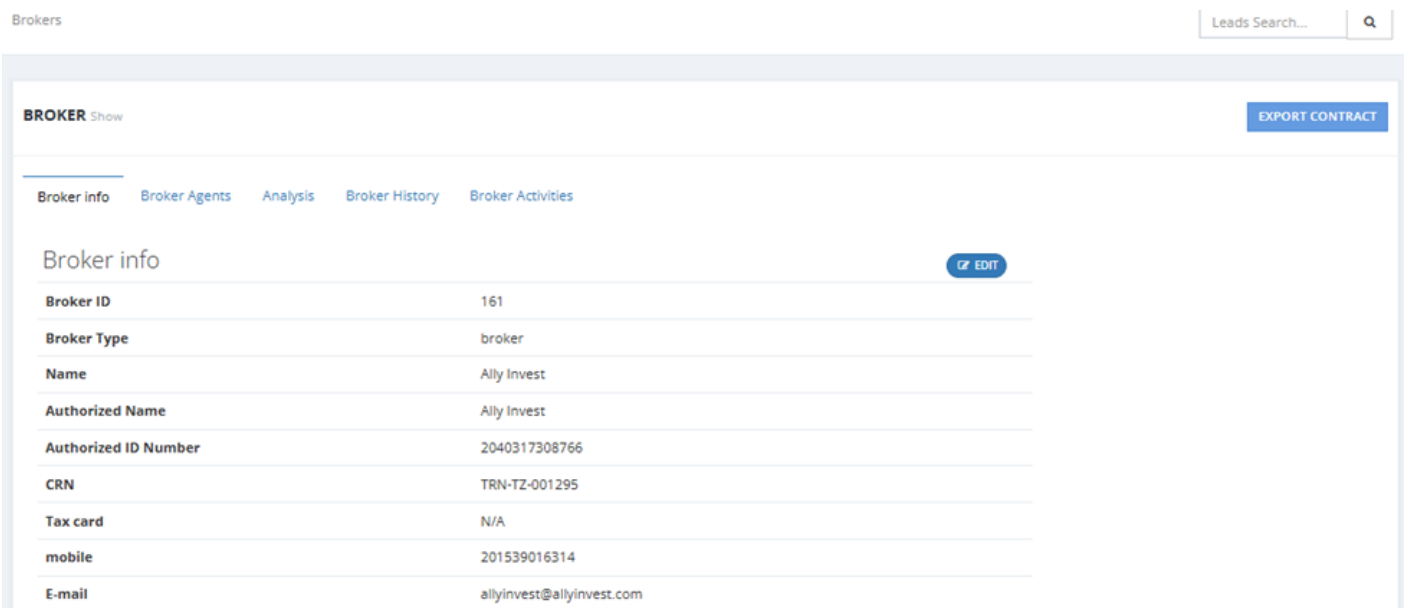
- **Broker** — Toggle ON to mark this as a broker contract.

4. Click **Create**.



How to Download a Broker Contract

1. Go to **Active Brokers** → open the broker's profile.
2. Click **Download Broker Contract** (or **Export Contract**).
3. Select which contract template to use.
4. The system generates a Word document with the broker's data filled in automatically.



Broker Settings

Access via **Settings** → **Broker Settings**:

Setting	Description
Broker Contract	Upload the default contract file template.
Can't Add Duplicated CIL	When ON, prevents duplicate CILs from being added.
Can't Add Duplicated CIL to the Same Broker CILs	When ON, prevents the same broker from submitting a duplicate CIL.
CIL Duplication Rejection Message	Message shown when a CIL is rejected as duplicate (e.g., "This CIL is Rejected").
CIL Duplication Acceptance Message	Message shown when a CIL is accepted (e.g., "CIL Added Successfully").
CIL Expiration Days	Number of days before a CIL expires.
Leads ID	Default Lead ID assigned to broker leads.
Block New Brokers By Default	When ON, all new brokers go to Pending/Blocked tab automatically.
Activity Todo Date (accept old date)	When ON, allows setting past dates for activity todo dates.
Start Contract Serial From	The starting number for contract serial numbering.

Broker Settings

Broker Settings

BROKERS SETTINGS

Broker Contract No file chosen

Can't add Duplicated CIL OFF

Can't Adding a duplicated cil to the same broker cils OFF

CIL duplication rejection message

CIL duplication acceptance message

CIL Expiration Days

Leads ID ▼

Block New Brokers By Default OFF

Activity Todo Date (accept old date) OFF

Start Contract Serial From

Access via **Settings** → **Broker Settings**:

Setting	Description
Broker Contract	Upload the default contract file template.
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