

# 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... **ADD +** **EXPORT -** **ACTIONS -**

<input type="checkbox"/>	broker name	Authorized Name	Mobile	Indirect Sales	Total Agents	Creation date	Didn't Add Lead Since	Actions
<input type="checkbox"/>	Ally Invest	Ally 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

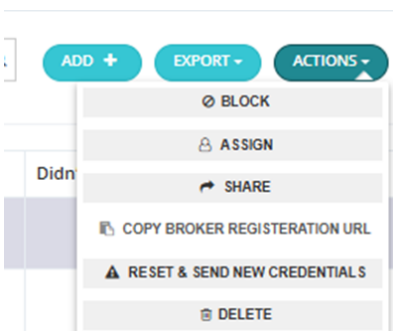
Column	Description
<b>Broker Name</b>	The broker company name.
<b>Authorized Name</b>	The authorized representative's name.
<b>Mobile</b>	Contact number.
<b>Indirect Sales</b>	Which salesmen are assigned as indirect sales for this broker.
<b>Total Agents</b>	Number of broker agents under this company.
<b>Creation Date</b>	When this broker was added to the system.

Column	Description
<b>Didn't Add Lead Since</b>	How long since this broker submitted a lead — useful for identifying inactive brokers.
<b>Actions</b>	Options menu (⋮).

# Available Actions

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

Action	Description
<b>Block</b>	Block the broker from submitting new leads or CILs.
<b>Assign</b>	Assign a salesman to this broker.
<b>Share</b>	Share broker information.
<b>Copy Broker Registration URL</b>	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 <b>contract</b> automatically — the system generates it based on whichever contract template is configured in <b>Broker Settings</b> . The broker can then print it, sign it physically, and bring it to the company or upload it back.
<b>Reset &amp; Send New Credentials</b>	Reset the broker's CRM login and send new credentials to their email.
<b>Delete</b>	Remove the broker from the system.
<b>Export</b>	Export the broker list.



# Broker Profile

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

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

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

Brokers Leads Search...

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**BROKER** Show EXPORT CONTRACT

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

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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.

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

## Add Broker Agent

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

Created 2026-06-28 09:04:26 UTC by Admin  
Updated 2026-07-08 13:42:19 UTC by Admin