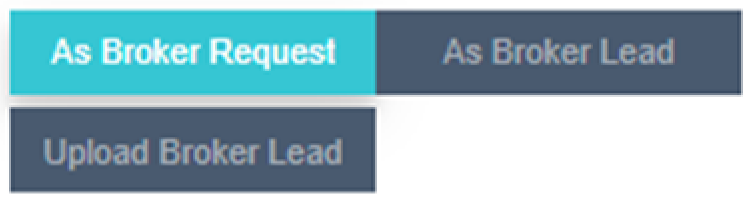
Add Broker Request / Lead

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.



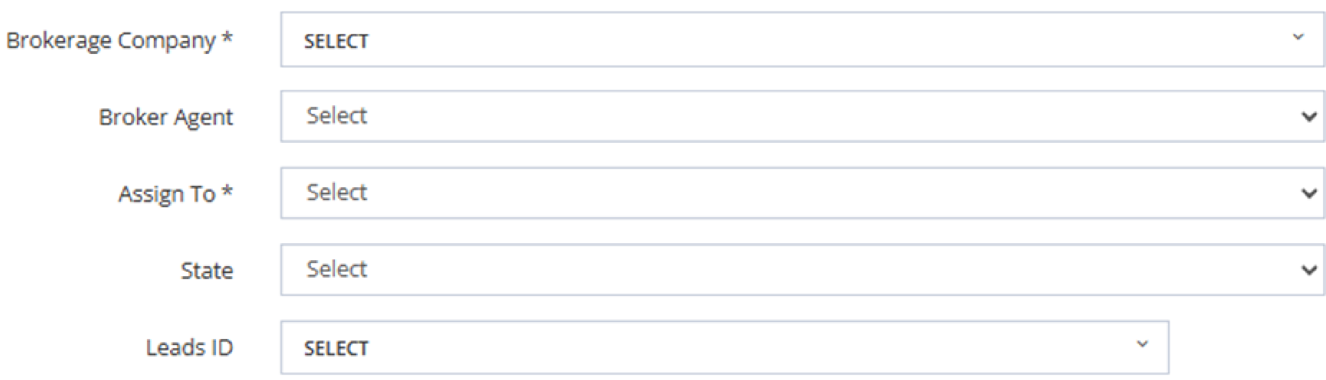
Broker Request vs Broker Lead

	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	□	Select the broker company.
Broker Agent	Optional	Select the agent within that company.
Assign To	□	Assign to a salesman.
State	Optional	Select the lead state.
Leads ID	□	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.



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.

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