

# Agent Roster Guide

Setting Up & Managing  
Your Agent Roster



smarter agent mobile

**CREATING YOUR COMPANY'S ROSTER...**



# CREATING YOUR FIRST ROSTER:

For an easy-to-follow instructional video on how to manage your agent roster, click [here](#) or go to the last slide.

- When setting up new agents for the first time, fill out the applicable columns highlighted in yellow below for your agents. (Not all columns are required for initial setup.)

	A	B	C	D	E	F	G	H	I	J
1	AGENT_NAME	DEFAULT_PHONE_NUMBER	EMAIL_ADDRESS	TEXT_CODE	DOWNLOAD_URL	PHOTO_URL	VANITY_TEXT_CODE	WEBSITE_URL	BRE_NUMBER	STATUS
2										

Please do NOT delete any blank columns found in the roster.



# Agent Information:

A	B	C	D	E	F	G	H	I	J
AGENT_NAME	DEFAULT_PHONE_NUMBER	EMAIL_ADDRESS	TEXT_CODE	DOWNLOAD_URL	PHOTO_URL	VANITY_TEXT_CODE	WEBSITE_URL	BRE_NUMBER	STATUS

- **Agent Name:** Write the agent (or team)'s name exactly how you would like it to appear in the app.
- **Phone #:** Phone number where the agent wishes to be contacted through their app. **DO NOT** include any punctuation or dashes.
- **Email:** Lead email address where agent wishes to be contacted through their app, this will also be their agent login username.
- **Photo:** Please provide an up-to-date photo for each agent. To pull the photo from your website, visit their photo, right click, click to open the image in a new tab, and insert that link into the roster.
  - *(250 character limit-if the URL is very long please choose a different photo or reach out to your account manager.)*
- **Status:** Write ACTIVE in that field - this will create the agent's app once the roster processes; if an agent is no longer active change the status to INACTIVE so that all of their users revert back to the company app.

# CREATING AGENT TEXT CODES:

- On the roster sheet, you will create custom app text codes for each of your agents in the **VANITY TEXT CODE** column. They must be unique with a matching prefix.
- Each agent's code will start with the same company prefix. Please work with your account manager on your selection as this needs to be set up ahead of time prior to submitting the first roster.

	A	B	C	D	E	F	G	H	I	J
1	AGENT_NAME	DEFAULT_PHONE_NUMBER	EMAIL_ADDRESS	TEXT_CODE	DOWNLOAD_URL	PHOTO_URL	VANITY_TEXT_CODE	WEBSITE_URL	BRE_NUMBER	STATUS
2										

**Smarter Agent Tip:** Stick to first initial + last name (for consistency and less repeats). You cannot have duplicate text codes in the roster. When the roster processes, it will move the text code over to the regular text code column to confirm it was created.

# SUBMITTING YOUR ROSTER:

## Instructions on how to submit:

- Make edits/additions to your roster & save
- Save the file as a .CSV (not excel file)
- When you are saving the file, change the name of the file to:
  - (your 20 digit company code) OR Roster\_(your 20 digit company code)
    - your 20 digit company code can be found in your Launch Guide, or you can reach out to your account manager.
- In the subject line of a new email, put ONLY:
  - (your 20 digit company code)
- Attach the roster file to the email

Email to [roster@smarteragent.com](mailto:roster@smarteragent.com)

# YOUR UPDATED ROSTER:

- Once the roster is sent in & processed, you will be emailed the next morning with the updated roster and notification that the agents' individual apps are being processed. They will be live that day.
- The **Text Code** and Download URL columns will be populated in the roster for each agent. You can look them up here if an agent ever needs them.
- **SAVE** this copy of your roster for making the next updates. **ALWAYS** update your most recent copy (reach out to [support@smarteragent.com](mailto:support@smarteragent.com) or your account manager if you are unsure if you have the right version.)



# MANAGING YOUR ROSTER...





# UPDATING YOUR ROSTER:

For an easy-to-follow instructional video on how to manage your agent roster, click [here](#) or go to the last slide.

- **Always** remember to make edits to the most recently processed roster received from [roster@smarteragent.com](mailto:roster@smarteragent.com) (or from your account manager).
  - If you are not currently receiving rosters, please alert your account manager to be added to the recipient list.
  - We want to use the most recently processed roster and if you make edits to an old roster, you may overwrite important changes and create issues that would need to be resolved with our support team later.

# CHANGING AGENT INFORMATION:

- *If you want to update an existing agent's info, like their name, phone, email or photo, you can update that info directly in that field. When the roster processes it will update that info in their app.*
- *If you want to overwrite and agent's text code, leave all existing information in tact (including the existing text code), and put the NEW text code in the **VANITY TEXT CODE** column. When the roster processes, it will overwrite the existing text code and move the new one over to the regular Text Code column. It will also update the Download URL for the agent.*

# DEACTIVATING AN AGENT:

- When you want to deactivate an agent, change their status to **INACTIVE** (leave all other information in tact).
- Instead of deleting the agent, they are deactivated. ***We do this so that your users who utilize the agent's app will still have access to your company's app when the agent's app is deactivated.***

**This way you are not losing users and your users are not losing their app.**

**\*\*If you delete the agent off the roster, they will be added back when the roster processes.\*\***

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[CLICK HERE TO WATCH  
THE ROSTER SETUP TUTORIAL](#)

