

Agent Offboarding

When an agent requests to leave Epique and offboard from the brokerage, a few things in the Power Portal need to happen.

- On the People page, the agent lead should be moved to the Archived pipeline, tagged as archived, and the Agent role in the profile should be changed to Archived Agents
 - Click on the lead name to view the profile
 - Click Pipeline and select Archived
 - Click the + icon in the Tag section and search/select archived (as shown in screenshot)
 -

POWER PORTAL People ▾ Transactions Calendar Markets

Lofty Guide

Agent

Pipeline: Archived ▾ Segment: - - ▾

[Call](#) [Text](#) [Email](#)

Details

Phone: 📞 +1 123-456-7890 (Bad Number)
Email: ✉ no-reply15119254698457236427@lo...
Source: Other
Reg Date: Sep 26, 2025
Buying Time Frame: 1-3
Tag: archived +

[+ Add Family Member](#)

[View Full Details](#)

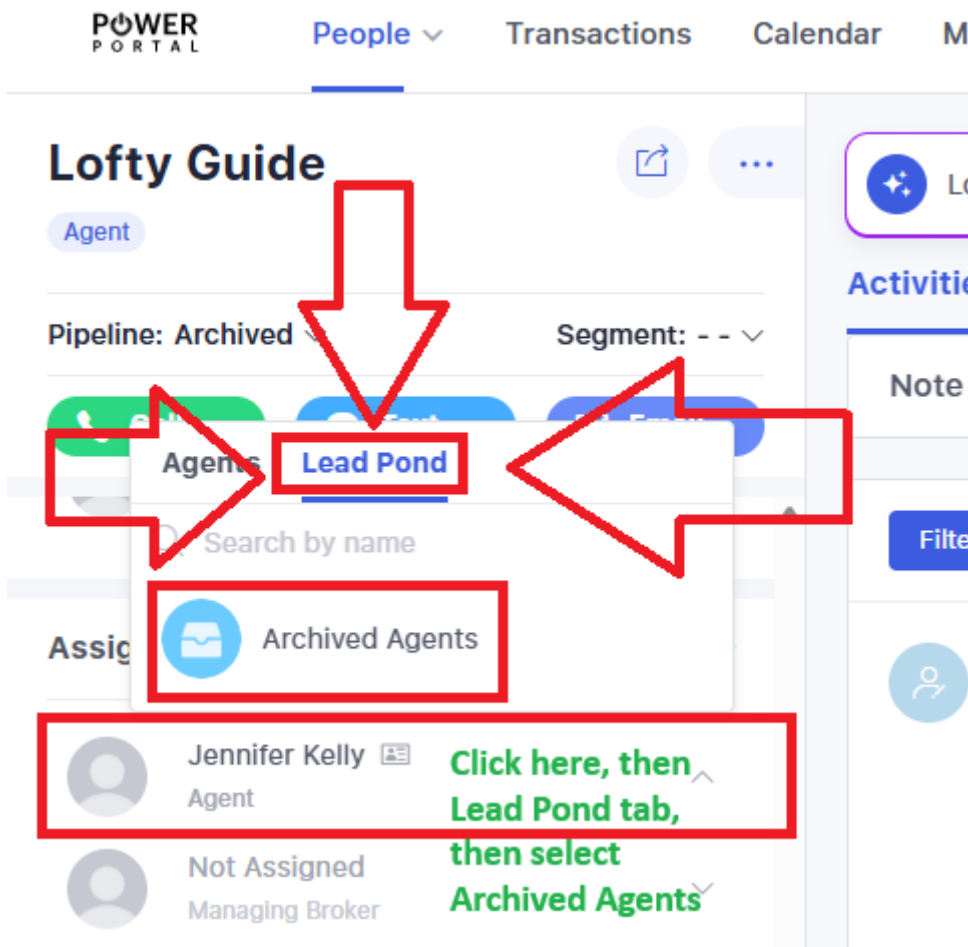
Insight

[Analysis](#)

Lead Score Last Touch Last Website Visit

- Scroll down on the left side until the Assignment roster is shown

- Click the Agent field, then click the Lead Pond tab, then select Archived Agents
- This change to the Pond will instantly remove all assigned roles and replace the Agent role with the lead pond name, Archived Agents
 - **From this point, only select Admins will have access to see these agent leads**



The agent lead will then be kept in that lead pond. If the agent rejoins, they can be brought out of the lead pond and information updated as needed.

Revision #3

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