

Activities of a Lead

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Timeline

What Is the Timeline Page?

The Timeline page provides a centralized view of all activities, communications, and interactions associated with a specific lead.

It allows you to review lead engagement history and quickly perform common actions without leaving the lead record.

The Timeline page helps you monitor ongoing conversations, track lead activity, and manage follow-up tasks from a single location.

Access the Timeline Page

1. Navigate to **CRM**.
2. Locate the desired lead.
3. Click the lead's name.

The lead record will open in the Timeline page by default.

Timeline Activity Filters

The left side of the Timeline page contains activity filters that allow you to quickly organize and review lead interactions.

All

Displays all activities associated with the lead, including:

- SMS
- Email
- Notes
- Call Logs
- Web Activity

SMS

Displays only SMS conversations associated with the lead.

Email

Displays only email communications associated with the lead.

Notes

Displays notes that have been created for the lead.

Call Log

Displays call activities associated with the lead.

Web Activity

Displays website activities performed by the lead.

Quick Actions

The Timeline page also provides quick actions that allow you to perform common lead management tasks.

To access these options:

1. Click the + icon in the bottom-right corner.

The following actions are available.

Add Task

Create a new task associated with the lead.

Add Action Plan

Assign an Action Plan to the lead.

Add Note

Create a new note for the lead.

Add Tag

Assign one or more tags to the lead.

Send Email

Send an email directly to the lead.

Send SMS from Smart Number

Send an SMS message using your configured Smart Number.

Benefits of Using the Timeline Page

The Timeline page helps you:

- View all lead activities in one place
 - Monitor communication history
 - Track website interactions
 - Organize lead notes
 - Access lead management tools quickly
 - Perform follow-up actions without leaving the lead record
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Lead Profile

What Is the Lead Profile?

The Lead Profile page provides a centralized view of all information associated with a specific lead.

It allows you to manage lead details, monitor alerts, action plans, task and appointments organize files

The Lead Profile helps you maintain a complete overview of your relationship with a lead and quickly access important information when needed.

Access the Lead Profile

1. Navigate to **CRM**.
2. Locate the desired lead.
3. Click the lead's name.
4. Click the **Profile** tab.

The Lead Profile page will be displayed.

Manage Contact Information

The top left section of the Lead Profile displays important lead information, including:

- Lead Name
- Phone Numbers
- Email Addresses
- Addresses
- Lead basic details
- Files
- Background city

Edit Lead Information

Most information within the Lead Profile can be edited directly from this page.

You can:

- Add or update tags
- Add, edit, or remove phone numbers
- Change the lead stage
- Add, edit, or remove email addresses

- Update various lead details throughout the profile

“ **Note:** The lead source cannot be edited from the Lead Profile page.

Addresses

This section displays addresses associated with the lead.

You can review and manage address information from here.

Property Alert Sections

The Lead Profile allows you to manage various property-related alerts assigned to the lead.

New Listing Alerts

Displays all New Listing Alerts assigned to the lead.

Neighbourhood Alerts

Displays all Neighbourhood Alerts assigned to the lead.

Open House Alerts

Displays all Open House Alerts assigned to the lead.

Price Drop Alerts

Displays all Price Drop Alerts assigned to the lead.

Files

The Files section allows you to upload, view, and manage documents associated with the lead.

Background

The Background section allows you to store additional notes or information related to the lead.

City

Displays city information associated with the lead.

Action Plans

Displays all Action Plans currently assigned to the lead.

You can also monitor their status from this section.

Real Estate Newsletter

Displays newsletter subscriptions associated with the lead.

Market Updates

Displays market update subscriptions assigned to the lead.

Tasks

Displays tasks associated with the lead.

This helps you track pending activities and follow-ups.

Appointments

Displays appointments scheduled for the lead.

This section helps you manage upcoming meetings and events.

Delete a Lead

You can also delete a lead directly from the Lead Profile page.

1. Scroll down within the Lead Profile page.
2. Click **Delete Lead**.
3. Review the confirmation message.
4. Click **Yes** to confirm.

The lead will be removed from the active CRM records.

“ **Note:** AgentRoof CRM uses a soft-delete process. If the same lead is recreated using the same primary contact information, previously associated information

may be restored.

Benefits of Using the Lead Profile

The Lead Profile helps you:

- View all lead information in one place
 - Edit and manage lead details
 - Organize lead-related documents
 - Monitor assigned alerts and automations
 - Track appointments and tasks
 - Manage communication and follow-ups
 - Delete leads when necessary
 - Maintain a complete history of lead activities
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Conclusion

You have successfully learned how to access and navigate the Lead Profile page in AgentRoof CRM.

Analytics

WEB Activity

Notes

What Are Notes?

Notes allow you to record important information, reminders, and updates associated with a lead.

They help you maintain a history of conversations, follow-up details, and other relevant information that can be referenced later.

Notes are stored within the lead record and can be viewed at any time.

View Notes

From the Timeline Page

1. Navigate to **CRM**.
 2. Select the desired lead.
 3. The lead record will open in the Timeline page.
 4. Under **All**, locate the notes associated with the lead.
 5. You can also click **Notes** from the activity filters to display only notes.
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Create a Note

1. From the lead's Timeline page, click the + icon in the bottom-right corner.
2. Click **Add Note**.
3. A pop-up window will appear.
4. Enter the note content.
5. Click **Submit**.

The note will be created successfully.

Preview a Note

1. Navigate to the lead's Timeline page.
2. Locate the desired note.
3. Click the note.

The complete note preview will be displayed.

Benefits of Using Notes

Notes help you:

- Record important lead information
 - Keep track of conversations and follow-ups
 - Maintain a history of lead interactions
 - Organize lead-related updates
 - Share information across your team
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Conclusion

You have successfully learned how to create, view, and preview notes in AgentRoof CRM.

You have successfully learned how to access and navigate the Timeline page in AgentRoof CRM.

Call Log