Lead Management

How to Create a Lead in AgentRoof CRM

Follow these steps to add a new lead to AgentRoof CRM.

Steps

1. Log in to AgentRoof CRM using your assigned credentials.
2. From the left-hand navigation menu, click **CRM**.
3. On the CRM page, click the + button located in the Leads row to create a new lead.
4. In the pop-up window, enter the lead's **Full Name**.
5. Provide atleast one contact method for the lead by entering a **Phone Number**, an **Email Address**, or both.
6. Select the appropriate **Lead Source** from the available options.
7. If the required source is not available, click the **+** button next to the Source field and create a new source.
8. Click **Save** to create the lead.

Result

The newly created lead will be displayed on the CRM page and is ready for follow-up and management.

You have successfully created a lead in AgentRoof CRM.

How to Import Multiple Leads into AgentRoof CRM

Follow these steps to import multiple leads into AgentRoof CRM using a CSV file.

Steps

1. Log in to AgentRoof CRM.
2. From the left-hand menu, click **CRM**.
3. Locate the yellow box icon in the Leads row and click **Import**.
4. Under **Select From**, choose the appropriate import option:
   - Direct Import
   - Facebook Import
5. Click the blue **Given Format** link to download the sample CSV file for the selected import type.
6. Open the downloaded CSV file.
7. Enter the lead information in the corresponding columns.

Direct Import Fields

For Direct Import, complete the following fields:

- Name
- Phone Number
- Email ID
- Tags
- Source
- Stage
- Notes

Field Requirements

- Each lead must have a valid name.
- Provide at least one contact method: a phone number, an email address, or both.
- Phone numbers must be valid 10-digit numbers without country codes or brackets.
- To add multiple phone numbers, separate them using a comma and a space. The first phone number will be used as the primary phone number.
- Email addresses must be entered in a valid format.
- To add multiple email addresses, separate them using a comma and a space. The first email address will be used as the primary email address.
- To assign multiple tags, enter them as comma-separated values.
- If no tag is provided, no tag will be assigned during import.

- If the Stage field is left blank, the lead will be assigned the default stage **Lead**.
- If the Source field is left blank, the lead will be assigned the default source **Import**.

Facebook Import Fields

For Facebook Import, the CSV file must contain the following columns:

- id
- created_time
- ad_id
- ad_name
- adset_id
- adset_name
- campaign_id
- campaign_name
- form_id
- form_name
- is_organic
- platform
- full_name
- phone_number
- email

8. Save the completed CSV file.
9. Return to AgentRoof CRM and upload the file.
10. Submit the import request.

Result

The import process will run in the background. A confirmation message will be displayed when the file is successfully added to the queue.

Once the import process is complete, an email notification will be sent to your registered email address indicating the import status.

- Successful imports will display the number of leads imported.
- Failed imports will include the corresponding error details.

You can view the imported leads from the Leads section in AgentRoof CRM.

You have successfully imported multiple leads into AgentRoof CRM.

How to Delete a lead in AgentRoof CRM?

What Happens When a Lead Is Deleted?

Deleting a lead removes the lead from the active CRM records and makes it no longer visible on the CRM page.

AgentRoof CRM uses a soft-delete process. If the same lead is recreated using the exact same primary contact information, such as the same email address or phone number, previously associated information—including notes, action plans, and email history—can be restored.

Method 1: Delete a Lead from the CRM Page

Steps

1. Navigate to **CRM**.
2. Select the checkbox next to the lead you want to delete.
3. Go to the more option
4. Click the **Delete** button.
5. Review the confirmation message.
6. Click **Yes** to confirm the deletion.

The selected lead will be deleted successfully.

Method 2: Delete a Lead from the Lead Profile Page

You can also delete a lead directly from its profile page.

Steps

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.
4. Scroll down and click **Delete Lead**.
5. Review the confirmation message.
6. Click **Yes** to confirm the deletion.

The selected lead will be deleted successfully.

Note

Deleting a lead does not permanently erase all associated information from the system. AgentRoof CRM uses a soft-delete mechanism to preserve historical data for future restoration if the same lead is recreated.

Conclusion

You have successfully learned how to delete leads from the CRM page and the Lead Profile page in AgentRoof CRM.

How to Search A lead?

The lead search feature allows you to quickly locate leads in AgentRoof CRM using a lead's name, phone number, or email address.

The search function supports partial matching. For example, if a lead's name is **Emma Taylor**, searching for **mma** will still return the matching lead. Similarly, you can search using a portion of an email address, phone number, or name, and the CRM will display relevant results.

Steps

1. Navigate to the CRM page.
2. Locate the search box on the top-left side of the listing page, directly below the **Leads** title.
3. Enter the lead's name, phone number, email address, or a portion of any of these values.
4. The CRM will automatically filter and display matching leads.

Result

The CRM will display all leads that match the search criteria, making it easier to locate and manage specific lead records.

How to Export the Leads?

Exporting leads allows you to download lead information from AgentRoof CRM into a CSV file for reporting, backup, analysis, or migration purposes.

The exported file can contain lead details such as names, phone numbers, email addresses, sources, tags, stages, and notes.

Exporting Selected Leads

1. Navigate to the **CRM** page.
2. Select the checkbox next to the leads you want to export. Alternatively, you can use filters such as Tags, Sources, Stages, or other available criteria to narrow down the leads you want to export.
3. Click the **More** option.
4. Under the more option click the **Export Leads** button.
5. An OTP will be sent to your registered email address and the phone number.
6. Enter the OTP to verify the export request.
7. Once verification is complete, the export process will begin automatically.

Exporting All Leads

1. Navigate to the **CRM** page.
2. Select the **Select All** checkbox.
3. Click the **More** option.
4. Under the more option click the **Export Leads** button.
5. An OTP will be sent to your registered email address and the phone number.
6. Enter the OTP to verify the export request.
7. Once verification is complete, the export process will begin automatically.

> **Note:** The OTP is valid for 10 minutes.

Export File Details

The exported file will be downloaded in CSV format.

The CSV file may contain the following lead information:

- Name

- Phone Numbers
- Email Addresses
- Source
- Tags
- Stage
- Notes

Result

The selected leads will be exported successfully and downloaded as a CSV file, allowing you to view, store, or manage lead information outside of AgentRoof CRM.

How to select lead?

Selecting leads allows you to perform actions on one or more leads at the same time. Once selected, leads can be used for various CRM operations such as assigning tags, stages, alerts, action plans, exporting data, and other bulk actions.

Steps

1. Navigate to the **CRM** page.
2. To select all leads currently displayed on the page, click the **Select All** checkbox located in the left-most column of the Leads row.
3. To select specific leads, click the checkbox next to each lead you want to select.
4. To view all selected leads, click **Selected Leads** located in the Leads row.
5. A pop-up window will appear displaying the list of currently selected leads.
6. To remove an individual lead from the selection, click the **X** icon next to that lead.
7. To remove all selected leads at once, click **Clear All**.

Result

The selected leads will remain available for bulk actions until they are removed individually or cleared from the selection list.

How to Filter all Leads?

Lead filtering helps you quickly narrow down your lead list and focus on specific groups of leads. This makes it easier to find relevant records, monitor lead activity, and perform targeted follow-ups without manually searching through all leads.

Steps

1. Navigate to the **CRM** page.

Filter by Recent Activity

1. Locate the **Recent Active** filter on the CRM page.
2. Click the filter to view recently active leads.
3. You can also filter leads based on activity from the last seven days.

Filter by Email Status

1. In the **Email** column, click the filter icon.
2. Select one of the available options:
    - Good
    - Bad
    - Empty
    - All

The CRM will display leads matching the selected email status.

Filter by Phone Status

1. In the **Phone** column, click the filter icon.
2. Select one of the available options:
    - Good
    - Bad
    - Empty
    - All

The CRM will display leads matching the selected phone status.

Filter by Created Date

1. In the **Created Date** column, click the filter icon.
2. Select a predefined date range or specify a custom date range.
3. Apply the filter.

The CRM will display leads created within the selected date range.

Filter by Tags

1. In the **Tags** column, click the filter icon.
2. Select one or more tags.
3. Apply the filter.

The CRM will display leads assigned to the selected tags.

Filter by Stage

1. In the **Stage** column, click the filter icon.
2. Select one or more stages.
3. Apply the filter.

The CRM will display leads assigned to the selected stages.

Filter by Source

1. In the **Source** column, click the filter icon.
2. Select one or more sources.
3. Apply the filter.

The CRM will display leads associated with the selected sources.

> **Note:** When filtering by source, the CRM includes leads that currently have the selected source as well as leads that have had the selected source at any point in their source history.

Result

The CRM will display only the leads that match the selected filter criteria, making it easier to locate, organize, and manage specific groups of leads.

How to Customize CRM Page Columns

The CRM page displays a set of default columns to help you view and manage lead information. You can customize these columns to display only the information that is most relevant to your workflow and rearrange their order to make the CRM page easier to navigate and manage.

There are two ways to customize CRM page columns in AgentRoof CRM.

Method 1: Show or Hide Columns

Steps

1. Navigate to the CRM page.
2. Click the **Settings** icon located on the CRM page.
3. A list of available columns will be displayed.
4. Select or deselect the columns you want to display on the CRM page.
5. The CRM page will update to reflect your selected column preferences.

Method 2: Reorder Columns

Steps

1. Navigate to the CRM page.
2. Locate the column you want to reposition.
3. Click and drag the selected column to your desired location.
4. Release the column to place it in its new position.
5. The CRM page will automatically update the column order.

> **Note**
>
> - The first column is fixed and cannot be reordered.
> - Displaying too many columns may impact the loading speed of the CRM page.
> - Any changes made to the column arrangement will be reflected immediately on the CRM page.

Result

The CRM page will display only the selected columns and their updated order, allowing you to customize the lead view according to your business needs and preferences.

How to assign Tags to Leads?

Tags help organize leads based on shared characteristics and make it easier to perform bulk actions, automate communications, and manage lead groups within AgentRoof CRM.

Method 1: Assign Tags from the Leads Listing Page

Steps

1. Navigate to the CRM page.
2. Select the checkbox next to the lead you want to assign a tag to.
3. Click the **Assign Tag** icon located in the Leads row.
4. A pop-up window will appear displaying all available tags.
5. Select the tag(s) you want to assign to the lead.
6. Click **Apply** or confirm the selection.

Method 2: Assign Tags from the Lead Profile Page

Steps

1. Select the desired lead.
2. Click the **Profile** button to open the lead profile page.
3. Locate the **Tags** section and click the **+** button beside it.
4. Select the checkbox for the tag(s) you want to assign. You can select multiple tags if needed.
5. Click **Apply** to confirm your changes.

> **Note:** When a lead is assigned to a tag, any active items associated with that tag—such as Action Plans, New Listing Alerts, Market Updates, Newsletters, or other tag-based automations—may also be applied to the lead, depending on the tag configuration.

Result

The selected lead will be assigned to the chosen tag and will become part of any workflows, communications, or automations associated with that tag.

How to assign Stages to a Lead?

Stages help organize leads based on their current position in the sales process, making it easier to track progress and manage lead pipelines within AgentRoof CRM.

Method 1: Assign Stages from the Leads Listing Page

Steps

1. Navigate to the CRM page.
2. Select the checkbox next to the lead you want to assign a stage to.
3. Click the **Assign Stage** icon located in the Leads row.
4. A pop-up window will appear displaying all available stages.
5. Select the stage you want to assign to the lead.
6. Click **Apply** or confirm the selection.

Method 2: Assign Stages from the Lead Profile Page

Steps

1. Select the desired lead.
2. Click the **Profile** button to open the lead profile page.
3. Locate the **Stage** section and click the current stage name.
4. Select the stage you want to assign to the lead.
5. The selected stage will be updated successfully.

> **Note:**
>
> - A lead can only have one stage at a time. To change a lead's stage, click the current stage name and select a new stage.
> - When a lead is assigned to a stage, any active items associated with that stage—such as Action Plans, Listing Alerts, Price Drop Alerts, Market Updates, Newsletters, or other stage-based automations—may also be applied to the lead, depending on the stage configuration.

Result

The selected lead will be assigned to the chosen stage and may automatically inherit any workflows, alerts, communications, or automations associated with that stage.

How to merge two leads in AgentRoof CRM?

Lead merging allows you to consolidate duplicate or similar lead records into a single lead profile. This is useful when multiple lead records contain overlapping information and you want to maintain a cleaner and more organized CRM database.

Steps

1. Navigate to the **CRM** page.
2. Select the checkboxes next to the leads you want to merge.
   - Minimum selection: 2 leads
   - Maximum selection: 10 leads
3. Click the **More** option.
4. Click the **Merge Leads** button
5. A pop-up window will appear displaying the selected leads.
6. Select the **Primary Lead** that you want to retain after the merge.
7. Review the merge details and confirm the action.
8. Click **Merge Leads**.

The selected leads will be merged successfully.

> **Note:** Transferred leads cannot be merged and will be excluded from the merge selection.

What Happens During a Merge?

When leads are merged:

- The selected Primary Lead will be retained.
- Contact information and associated activities from the other selected leads will be transferred to the Primary Lead.
- The remaining lead records will be removed from the CRM.

The following items associated with the merged leads will be permanently discarded:

- Action Plans
- Alerts
- Stages
- Tags

- Sources
- Tasks
- Appointments
- Newsletters
- Market Updates
- Scheduled Items

> **Important:** Lead merging is a permanent action and cannot be undone.

Result

The selected leads will be consolidated into the chosen Primary Lead, helping maintain a cleaner CRM database while preserving contact information and associated activities under a single lead record.