

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.

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