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**
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> - 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.

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