

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.

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