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.

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