

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.

Revision #4

Created 2026-06-01 12:02:38 UTC by AgentRoof

Updated 2026-06-16 06:10:16 UTC by AgentRoof