Lead Profile

What Is the Lead Profile?

The Lead Profile page provides a centralized view of all information associated with a specific lead.

It allows you to manage lead details, monitor alerts, action plans, task and appointments organize files

The Lead Profile helps you maintain a complete overview of your relationship with a lead and quickly access important information when needed.

Access the Lead Profile

1. Navigate to **CRM**.
2. Locate the desired lead.
3. Click the lead's name.
4. Click the **Profile** tab.

The Lead Profile page will be displayed.

Manage Contact Information

The top left section of the Lead Profile displays important lead information, including:

- Lead Name
- Phone Numbers
- Email Addresses
- Addresses
- Lead basic details
- Files
- Background city

Edit Lead Information

Most information within the Lead Profile can be edited directly from this page.

You can:

- Add or update tags
- Add, edit, or remove phone numbers
- Change the lead stage

- Add, edit, or remove email addresses
- Update various lead details throughout the profile

> **Note:** The lead source cannot be edited from the Lead Profile page.

Addresses

This section displays addresses associated with the lead.

You can review and manage address information from here.

Property Alert Sections

The Lead Profile allows you to manage various property-related alerts assigned to the lead.

New Listing Alerts

Displays all New Listing Alerts assigned to the lead.

Neighbourhood Alerts

Displays all Neighbourhood Alerts assigned to the lead.

Open House Alerts

Displays all Open House Alerts assigned to the lead.

Price Drop Alerts

Displays all Price Drop Alerts assigned to the lead.

Files

The Files section allows you to upload, view, and manage documents associated with the lead.

Background

The Background section allows you to store additional notes or information related to the lead.

City

Displays city information associated with the lead.

Action Plans

Displays all Action Plans currently assigned to the lead.

You can also monitor their status from this section.

Real Estate Newsletter

Displays newsletter subscriptions associated with the lead.

Market Updates

Displays market update subscriptions assigned to the lead.

Tasks

Displays tasks associated with the lead.

This helps you track pending activities and follow-ups.

Appointments

Displays appointments scheduled for the lead.

This section helps you manage upcoming meetings and events.

Delete a Lead

You can also delete a lead directly from the Lead Profile page.

1. Scroll down within the Lead Profile page.
2. Click **Delete Lead**.
3. Review the confirmation message.
4. Click **Yes** to confirm.

The lead will be removed from the active CRM records.

> **Note:** AgentRoof CRM uses a soft-delete process. If the same lead is recreated using the same primary contact information, previously associated information may be restored.

Benefits of Using the Lead Profile

The Lead Profile helps you:

- View all lead information in one place
- Edit and manage lead details
- Organize lead-related documents
- Monitor assigned alerts and automations
- Track appointments and tasks
- Manage communication and follow-ups
- Delete leads when necessary
- Maintain a complete history of lead activities

Conclusion

You have successfully learned how to access and navigate the Lead Profile page in AgentRoof CRM.

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