Notes

What Are Notes?

Notes allow you to record important information, reminders, and updates associated with a lead.

They help you maintain a history of conversations, follow-up details, and other relevant information that can be referenced later.

Notes are stored within the lead record and can be viewed at any time.

View Notes

From the Timeline Page

1. Navigate to **CRM**.
2. Select the desired lead.
3. The lead record will open in the Timeline page.
4. Under **All**, locate the notes associated with the lead.
5. You can also click **Notes** from the activity filters to display only notes.

Create a Note

1. From the lead's Timeline page, click the **+** icon in the bottom-right corner.
2. Click **Add Note**.
3. A pop-up window will appear.
4. Enter the note content.
5. Click **Submit**.

The note will be created successfully.

Preview a Note

1. Navigate to the lead's Timeline page.
2. Locate the desired note.
3. Click the note.

The complete note preview will be displayed.

Benefits of Using Notes

Notes help you:

- Record important lead information
- Keep track of conversations and follow-ups
- Maintain a history of lead interactions
- Organize lead-related updates
- Share information across your team

Conclusion

You have successfully learned how to create, view, and preview notes in AgentRoof CRM.

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

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