

Timeline

What Is the Timeline Page?

The Timeline page provides a centralized view of all activities, communications, and interactions associated with a specific lead.

It allows you to review lead engagement history and quickly perform common actions without leaving the lead record.

The Timeline page helps you monitor ongoing conversations, track lead activity, and manage follow-up tasks from a single location.

Access the Timeline Page

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

The lead record will open in the Timeline page by default.

Timeline Activity Filters

The left side of the Timeline page contains activity filters that allow you to quickly organize and review lead interactions.

All

Displays all activities associated with the lead, including:

- SMS
- Email
- Notes
- Call Logs
- Web Activity

SMS

Displays only SMS conversations associated with the lead.

Email

Displays only email communications associated with the lead.

Notes

Displays notes that have been created for the lead.

Call Log

Displays call activities associated with the lead.

Web Activity

Displays website activities performed by the lead.

Quick Actions

The Timeline page also provides quick actions that allow you to perform common lead management tasks.

To access these options:

1. Click the + icon in the bottom-right corner.

The following actions are available.

Add Task

Create a new task associated with the lead.

Add Action Plan

Assign an Action Plan to the lead.

Add Note

Create a new note for the lead.

Add Tag

Assign one or more tags to the lead.

Send Email

Send an email directly to the lead.

Send SMS from Smart Number

Send an SMS message using your configured Smart Number.

Benefits of Using the Timeline Page

The Timeline page helps you:

- View all lead activities in one place
 - Monitor communication history
 - Track website interactions
 - Organize lead notes
 - Access lead management tools quickly
 - Perform follow-up actions without leaving the lead record
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Revision #7

Created 2026-06-15 07:33:59 UTC by AgentRoof

Updated 2026-06-22 17:32:15 UTC by AgentRoof