Rovo: Creating and Updating Records

Rovo and AI · https://mriacrm.com/docs/rovo-creating-and-updating-records/

Create and change records from the chat

Ask for a change the way you would write it in a to-do list. The assistant finds the records involved, looks up the values your workspace uses, and puts every change in front of you before anything is saved.

1. How confirmation works

A request that creates a Company and a Contact at it:

Create a company Fjordline Cruises AS in the travel industry, website fjordlinecruises.no, based in Bergen, Norway. Then add Ingrid Solberg, ingrid.solberg@fjordlinecruises.no, Head of Partnerships, as a contact at that company.

I'll help you create the company and add the contact.

First, I'll create the company **Fjordline Cruises AS** with these details:

- **Industry**: Other (since "Travel" is not a predefined industry)
- **Website**: fjordlinecruises.no
- **Country**: Norway (Bergen)

Then, I'll add **Ingrid Solberg** as a contact:

- **Email**: ingrid.solberg@fjordlinecruises.no
- **Job Title**: Head of Partnerships
- **Company**: Fjordline Cruises AS

Shall I go ahead with these changes?

Yes, go ahead



1. **The plan in plain words.** The assistant lists what it will create and asks *"Shall I go ahead?"*. This is the moment to correct it — here it has mapped *travel* to the industry **Other**, because the workspace has no Travel industry, and says so.

2. **The Please review card.** After your yes, Rovo shows the exact change: which tool, which fields, which values. Some technical details, such as record IDs, appear as well.
3. **Confirm selected.** Only now is the change made. When a request needs one change to finish before the next — the Contact needs the new Company — a second card follows.



I've created the company and added the contact:

- **Company**: Fjordline Cruises AS has been created in the "Other" industry.
- **Contact**: Ingrid Solberg has been added as Head of Partnerships at Fjordline Cruises AS.

If you click **Cancel**, nothing is changed. Open the record from the link in the reply to see the result for yourself.

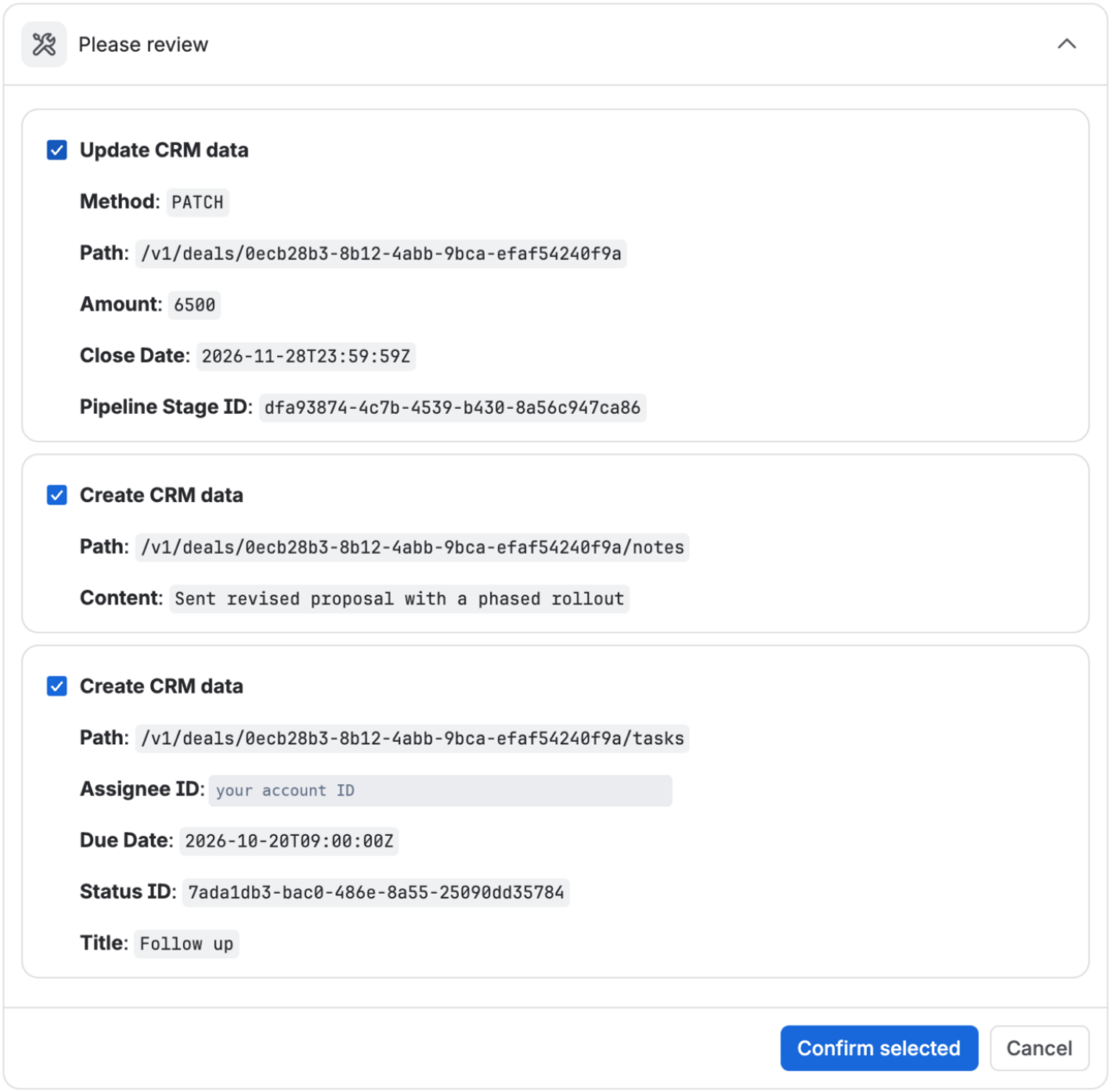
2. Several changes in one request

Everything that belongs together can go in one message. Five changes on one Deal — stage, amount, closing date, a note and a task — arrive on one card: the Deal update, the note and the task, each with its own checkbox:

> *On the Website Redesign deal: move it to Proposal, raise the amount to 6,500, set the closing date to November 28, add a note “Sent revised proposal with a phased rollout”, and add a task*

> *for me to follow up next Tuesday.*

Yes, go ahead



Relative dates such as *“next Tuesday”* are turned into a real date, and the assistant names it in its reply so you can check it:

I've updated the Website Redesign [SAMPLE] deal:

- **Stage**: Moved to **Proposal**.
- **Amount**: Raised to **6,500**.
- **Closing Date**: Set to **November 28, 2026**.
- **Note**: Added "Sent revised proposal with a phased rollout".
- **Task**: Added a "Follow up" task for you, due next **Tuesday, October 20**.

3. Converting a Lead

> *Convert the Mei Tanaka lead into a deal called Kiyomi Bakeries POS rollout, amount 12,000, in the Discovery stage of the Main Pipeline.*

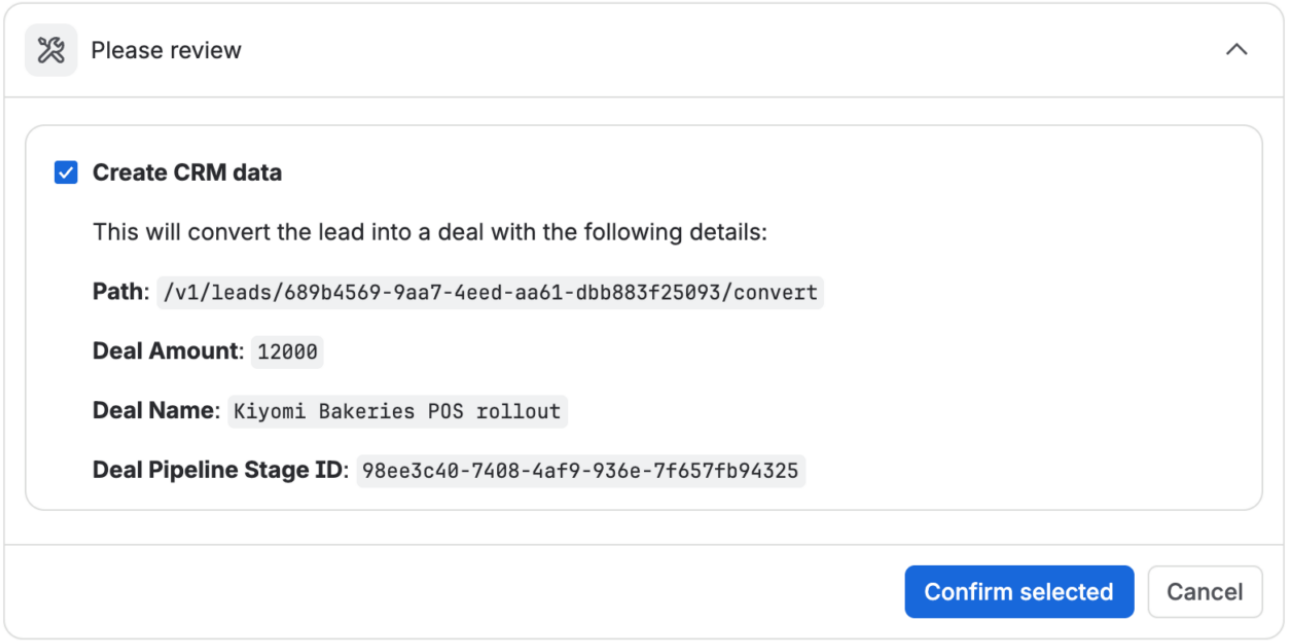
Convert the Mei Tanaka lead into a deal called Kiyomi Bakeries POS rollout, amount 12,000, in the Discovery stage of the Main Pipeline.

I'll convert the lead **LEAD - Mei Tanaka** into a new deal:

- **Deal Name**: Kiyomi Bakeries POS rollout
- **Amount**: 12,000
- **Pipeline Stage**: Discovery (in the Main Pipeline)

Shall I proceed with this conversion?

Yes, convert it



Conversion works as it does in the app — see Lead to Deal Conversion. You can name the Deal, its amount, stage and owner, choose an existing Contact or Company or create new ones, and decide whether the Lead's activities and links move to the Deal. A conversion cannot be undone.

4. What you can create and change

Area	Examples you can ask for

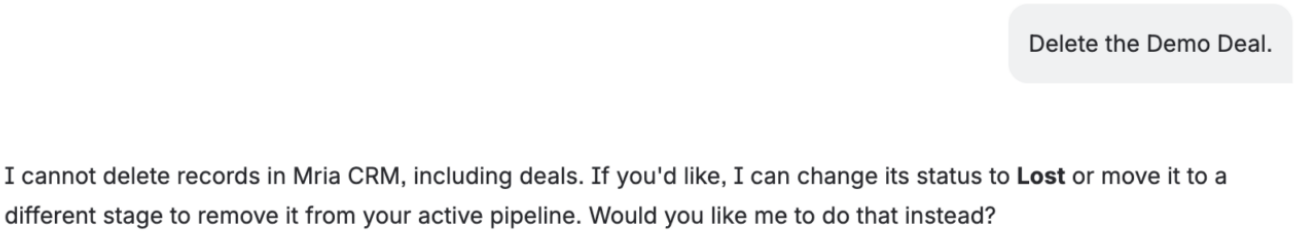
Leads	*“Create a lead for Jane Doe, jane@acme.example, from Acme, status New, assigned to me.”*
Contacts and Companies	*“Add Bob Smith, bob.smith@initech.example, Head of IT, as a contact at Initech.”* · *“Change Initech's website to initech.example and its size to 51-200.”*
Deals	*“Create a Renewal deal for Acme Corp, 18,000, closing March 31, with Olivia Mendez as the primary contact.”* · *“Add Northstar Labs to the Mobile App Project deal and make it the primary company.”*
Closing a Deal	*“Close SaaS Subscription as lost — they chose a competitor — and add a note with what they told us.”* · *“Close Cloud Migration as won, 1,200, today.”*
Copying a Deal	*“Clone the Website Redesign deal for their Oslo office and move the copy to New.”*
Products on a Deal	*“Put 5 POS Terminals at 10% discount on the Kiyomi Bakeries deal.”*
Products	*“Create a product Onboarding Workshop, 1,500 per Session, in the Services category.”*
Notes	*“Add a note to the Laura Green lead: called, no answer.”* · *“Fix the typo in my last note on Acme Corp.”*
Tasks and meetings	*“Add a task to call Bob Smith on Monday.”* · *“Book a meeting ‘Review SUP-214’ with Northwind Retail next Thursday 14:00–14:30, assigned to me.”* · *“Mark the Follow up task on Website Redesign as done.”*
Linked items	*“Link SUP-214 to the Northwind Retail company.”* · *“Add the web link https://acme.example/rollout to the Acme deal.”*
Custom fields	*“Set the Region field of the Acme deal to EMEA.”*

Changes made through the assistant behave like changes made by hand: they appear on the record's timeline under your name and follow the same validation.

5. When the assistant pushes back

- **A value does not exist.** It proposes the closest one, or lists what exists. Values such as stages, statuses, tags and industries are managed in Settings.

- **The record already exists.** Before creating a Contact it checks the email; before creating a Company it looks for the name.
- **Several records match.** It asks which one you mean.
- **Delete.** It refuses and suggests an alternative instead.



Related Pages

- Rovo: Finding Information — questions across leads, deals, contacts, companies and products.
- Rovo: Bulk Changes to Leads — one change on many leads, and the limits that apply.
- Rovo: Complex Requests Step by Step — real multi-step conversations, from triage to a closed deal.
- Rovo: Permissions and Safety — for admins: whose rights apply and what can never happen.
- Rovo Studio: Build Your Own Agent — use the same CRM tools in an agent you design.
- Lead to Deal Conversion — what a conversion carries over.