Sending Emails & SMS from the CRM

How to Send the Emails?

What Is the Send Email Feature?

The Send Email feature allows you to send emails directly to leads from multiple locations within AgentRoof CRM.

Emails can be sent using existing email templates or by modifying the content before sending. You can also choose a signature before sending the email.

Send Email is available from:

- CRM Page
- Lead Profile
- User Profile Email Section
- Inbox

Send Email from the CRM Page

1. Navigate to **CRM**.
2. Select one or more leads.
3. Click **Email** from the top menu.

A compose email window will appear.

4. Either you can type the message manually or select an existing email template

You can:

- Search for a template.
- Browse available templates.

5. Click **OK**.

The selected template content will be loaded.

6. Select the desired email signature.

By default, your default signature will be selected automatically.

You may choose a different signature if required.

7. Review or modify the email content.
8. Click **Send**.

The email will be sent successfully.

Send Email from a Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead profile.
3. Click The **Plus** button from the bottom right.
4. Select **Send Email**.

The email editor will appear.

5. Enter or modify the email details.

You can:

- Change the subject.
- Modify the email body.
- Select a template.
- Select a signature.

6. Click **Send**.

The email will be sent successfully.

Send Email from the User Profile

1. Open your profile.
2. Locate the Email Ids
3. Click on the Send Email Icon against an Email Id

The email compose window will appear.

4. Enter or modify the email details.
5. Review the content.
6. Click **Send**.

The email will be sent successfully.

Inbox Overview

The Inbox allows you to view and manage:

- Sent emails
- Received emails
- Sent SMS messages

- Received SMS messages

All communication history with leads can be viewed from the Inbox.

Send Email from Inbox

The Inbox allows you to send new emails to leads, compose emails for specific leads, and reply to existing email conversations.

Send a New Email

1. Navigate to **Inbox**.
2. Click **Send New Email** from the top menu.
3. Select the lead you want to email.
4. Enter or modify the required email details.
5. Click **Send**.

The email will be sent successfully.

Send Email from a Specific Conversation

1. Navigate to **Inbox**.
2. Click on the **Email** tab (by default, the email tab will be selected)
3. Locate the lead you want to email (click on the conversation)
4. Click **Compose (**on the top of the conversation details at the right side**)**
5. The email editor will open for the selected lead.
6. Enter or modify the email content.
7. Click **Send**.

The email will be sent successfully.

Reply to an Email

1. Click Email Tab
2. Select **Inbox** from the dropdown menu.
3. Locate the lead you want to email.
4. Click on the **reply button of the respective email**.
5. The email editor will open for the selected email.
6. Enter or modify the email content.
7. Click **Send**.

The reply will be sent successfully.

Reply to an Email from the profile

1. Open a lead detail page
2. Click on the timeline
3. Select the Email Activity Section
4. Click on the reply icon on the email you want to reply
5. The email editor will open for the selected email.
6. Enter or modify the email content.
7. Click **Send**.

Email Templates While Sending Emails

When composing an email from any available location, you can:

1. Select an Email Template.
2. Search for the desired template if needed.
3. Load the template content.
4. Modify the subject or body if required.
5. Send the email.

This allows quick communication while maintaining consistent messaging.

You have successfully learned how to send emails in AgentRoof CRM.

How to Send the SMS?

What Is SMS Messaging?

SMS Messaging allows you to communicate directly with leads from multiple areas within AgentRoof CRM.

You can send personalized text messages, use SMS templates, and insert merge fields to streamline lead communication and follow-up activities.

AgentRoof CRM provides multiple ways to send SMS messages, allowing you to choose the workflow that best suits your needs.

Before sending an SMS message, ensure that:

- The lead has a valid phone number.
- Sufficient SMS credits are available in your account.
- SMS templates have been created if you intend to use them.
- Merge fields are configured as needed for personalization.

Method 1: Send SMS from the CRM Page

Access the CRM Page

1. Navigate to **CRM**.
2. Select the checkbox next to the desired lead or leads.
3. Click **Send SMS** from the action bar.

The SMS composer will open.

Compose the Message

1. Enter the SMS content.
2. Optionally use:
    - SMS Templates
    - Merge Fields

Send the SMS

1. Review the message.

2. Click **Send**.

The SMS will be sent successfully to the selected lead or leads.

Method 2: Send SMS from a Lead Record

Open a Lead Record

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

The lead record will open.

Open the SMS Composer

1. Click the **+** icon in the bottom-right corner.
2. Click the **SMS** icon.

The SMS composer will open.

Compose the Message

1. Enter the SMS content.
2. Optionally use:
   - SMS Templates
   - Merge Fields

Send the SMS

1. Review the message.
2. Click **Send**.

The SMS will be sent successfully to the selected lead.

Method 3: Send SMS from the Lead Profile

Open the Lead Profile

1. Navigate to **CRM**.
2. Open the desired lead record.
3. Click the **Profile** tab.

Locate the Phone Number

1. Scroll down to the **Phone Numbers** section.

2. Click the **SMS** icon next to the desired phone number.

The SMS composer will open.

Compose the Message

1. Enter the SMS content.
2. Optionally use:
   - SMS Templates
   - Merge Fields

Send the SMS

1. Review the message.
2. Click **Send**.

The SMS will be sent successfully to the selected lead.

Method 4: Send SMS from the Inbox

Access the Inbox

1. Click **Inbox** from the top navigation bar.
2. Click **Send New SMS**.

The Smart SMS composer will open.

Compose the Message

1. Click the **+** icon.
2. Search for and select the lead you want to message.
3. Enter your SMS content.

Optional features:

- Select an SMS Template.
- Insert Merge Fields.

Send the SMS

1. Review the message.
2. Click **Send**.

The SMS will be sent successfully to the selected lead.

Send an SMS to an Existing Lead Conversation

You can also send SMS messages directly within an existing lead conversation from the Inbox.

Steps

1. Navigate to **Inbox**.
2. Click the **SMS** tab.
3. Locate and open the desired lead conversation.

You can send an SMS in two different ways.

Method 1: Send an SMS Using the Send SMS Button

1. Click **Send SMS**.
2. Compose your message.
3. Optional:
   - Select an **SMS Template**.
   - Insert **Merge Fields** to personalize the message.
4. Click **Send**.

Method 2: Send an SMS Directly from the Conversation

1. Locate the **Enter Message** field at the bottom of the conversation.
2. Type your message.
3. Click the **Send** icon.

The SMS will be sent successfully to the selected lead and will appear within the conversation history.

SMS Personalization Features

While composing an SMS message, you can use additional tools to personalize and review your message before sending it.

Preview

The Preview feature allows you to review the final SMS before sending it to the recipient.

1. Click the **Preview** (Eye) icon while composing the message.
2. Review the recipient information and message content.
3. Close the preview window to return to the composer, or continue editing if needed.

Using Preview helps you verify the message before it is sent.

SMS Templates

SMS Templates allow you to insert preconfigured message content into your SMS.

Merge Fields

Merge Fields allow you to insert dynamic lead information into the message automatically.

Examples include:

- Lead Name
- Email Address
- Phone Number

Conclusion

You have successfully learned the different ways to send SMS messages in AgentRoof CRM, including sending messages from the Inbox, CRM page, lead record, and lead profile.

How to Send Bulk Emails?

What Is Bulk Email?

The Bulk Email feature allows you to send a single email to multiple leads at the same time.

Bulk emails help you communicate with multiple leads efficiently without sending individual emails one by one. They can be used to share updates, follow up with groups of leads, deliver important information, and maintain consistent communication across your contact database.

Bulk emails can be sent from:

- CRM Page
- Inbox

Note: When sending a bulk email, the system checks whether you have sufficient email credits available. If the number of recipients exceeds your available email credits, an error message will be displayed indicating that there are not enough credits to send the email. Additional email credits can be purchased from your Profile page if needed.

Send Bulk Emails from the CRM Page

1. Navigate to **CRM**.
2. Select the leads you want to email.

You may:

- Select individual leads.
- Click **Select All** to select all available leads.
- Use filters such as **Status**, **Source**, **Tags**, **Stages**, and other available filters to locate specific groups of leads.

3. Click **Email** from the top menu.

The email composer window will appear.

4. Enter or modify the email details.

You can:

- Select an Email Template.
- Choose an Email Signature.
- Insert Merge Fields to personalize the email.
- Modify the email subject.

- Modify the email body.

5. Review the email content.
6. Click **Send**.

The email will be sent successfully to all selected leads.

Send Bulk Emails from Inbox

1. Navigate to **Inbox**.
2. Click **Send New Email**.

The compose email window will appear.

3. Select the leads you want to email.
4. Enter or modify the email details.

You can:

- Select an Email Template.
- Choose an Email Signature.
- Insert Merge Fields to personalize the email.
- Modify the email subject.
- Modify the email body.

5. Review the email content.
6. Click **Send**.

The email will be sent successfully to all selected leads.

Email Templates While Sending Bulk Emails

While composing a bulk email, you can select an existing Email Template.

1. Click **Select Template**.
2. Choose the desired template.

The template content will automatically populate the email editor.

You may modify the subject or email body before sending.

Email Signatures While Sending Bulk Emails

While composing a bulk email, you can select an email signature.

By default, your default signature will be selected automatically.

You may choose a different signature if required.

The selected signature will be included in the email before sending.

Merge Fields While Sending Bulk Emails

While composing a bulk email, you can insert Merge Fields into the subject or email body.

Merge Fields automatically replace placeholders with the corresponding lead information when the email is sent, helping personalize each email for the recipient.

You have successfully learned how to send bulk emails in AgentRoof CRM.

How to Send Bulk SMS?

Bulk SMS allows you to send a single SMS message to multiple leads at the same time, helping you communicate efficiently with groups of leads within AgentRoof CRM.

There are two ways to send bulk SMS in AgentRoof CRM.

Method 1: Send Bulk SMS from the CRM Page

Steps

1. Navigate to the **CRM** page.
2. Select the leads you want to message.
3. You can send a bulk SMS by:
   - selecting all leads,
   - selecting filtered leads,
   - or selecting specific leads using the checkboxes.
4. Click the **SMS** button.
5. Compose your SMS message.
6. If needed, use templates and merge fields to personalize the message.
7. Click **Send** to send the SMS to the selected leads.

Method 2: Send Bulk SMS from the Inbox Page

Steps

1. Navigate to the **Inbox** page.
2. Click the **Send New SMS** button.
3. Click the **+** button to add recipients.
4. Select the leads you want to include in the bulk SMS.
5. Click **Select** to confirm your lead selection.
6. Compose your SMS message.
7. If needed, use templates and merge fields to quickly create and personalize the message.
8. Click **Send** to send the SMS to the selected leads.

> **Note**
>
> - Ensure that sufficient SMS credits are available before sending a bulk SMS campaign. If there are not enough credits available, the SMS messages will not be sent.
> - If additional credits are required, you must purchase more SMS credits before sending the campaign

> - Ensure the selected leads have valid phone numbers before sending the message.

Result

The bulk SMS will be sent to all selected leads, allowing you to communicate with multiple recipients efficiently from a single message.

How to Schedule Emails & SMS?

AgentRoof CRM allows you to schedule SMS messages and emails to be sent at a later date and time. Scheduled communications help you plan outreach in advance and ensure messages are delivered at the appropriate time.

You can also view and manage all scheduled communications from the Scheduled section within the Inbox page.

There are two ways to schedule communications in AgentRoof CRM.

Schedule an SMS

Steps

1. Open an **SMS composer** from any location in AgentRoof CRM where SMS messages can be created, such as Inbox, CRM, or a lead record.
2. Select the lead(s) you want to message.
3. Compose your SMS message.
4. You can either create the message manually or use a pre-built template.
5. Click the **Schedule** (clock) icon.
6. Select the desired date and time.
7. Confirm the schedule.

View and Manage Scheduled SMS

1. Navigate to the **Inbox** box.
2. Click the **Scheduled** tab.
3. Locate the scheduled SMS.
4. From here, you can:
   - **Send Now**
   - **Edit**
   - **Reschedule**
   - **Delete**

Schedule an Email

Steps

1. Open an **Email composer** from any location in AgentRoof CRM where SMS messages can be created, such as Inbox, CRM, or a lead record.

2. Select the lead(s) you want to email.
3. Enter the subject and compose your email.
4. You can either create the email manually or use a pre-built template.
5. Click the **Schedule** (clock) icon.
6. Select the desired date and time.
7. Confirm the schedule.

View and Manage Scheduled Emails

1. Navigate to the **Inbox** box.
2. Click the **Scheduled** tab.
3. Locate the scheduled email.
4. From here, you can:
   - **Send Now**
   - **Edit**
   - **Reschedule**
   - **Delete**

> Note
>
> - Scheduled communications remain available in the **Scheduled** tab until they are sent or deleted.

Result

The SMS or email will be scheduled for the selected date and time. You can manage scheduled communications until they are sent or deleted.

Email and SMS Reports

What Are Email and SMS Reports?

Email and SMS Reports provide a centralized view of all communication activities performed within AgentRoof CRM.

These reports help you monitor message delivery, track recipient engagement, and identify potential delivery issues.

By reviewing these reports, you can better understand how your email and SMS campaigns are performing and take appropriate actions when needed.

Access Reports

1. Navigate to **Reports** from the left-hand menu.

The Reports page will be displayed.

From here, you can access both:

- Email Reports
- SMS Reports

Email Reports

Access Email Reports

1. Navigate to **Reports**.
2. Click **Email Reports**.

The Email Reports page will be displayed.

This page provides detailed information about email delivery status, recipient engagement, and email performance.

Email Report Fields

Subject

Displays the subject line of the email that was sent.

Date

Displays the date and time when the email activity occurred.

Recipients

Displays the recipient who received the email.

Delivered

Indicates that the email has been successfully accepted by the recipient's mail server.

Opened

Indicates that the recipient opened the email with images enabled.

This event is recorded each time the email is viewed.

Clicked

Indicates that the recipient clicked a call-to-action link within the email.

This helps track recipient engagement.

Skipped

Indicates that the email was not sent because the recipient's email address was invalid or unsubscribed.

Processed

Indicates that the email was successfully sent from AgentRoof CRM, but no status update was received from the recipient's mail server.

Dropped

Indicates that the recipient's email provider blocked or filtered the email before it could be delivered.

This commonly occurs due to spam filtering policies.

Deferred

Indicates that the email could not be delivered immediately.

The system will continue attempting delivery for up to 72 hours.

Bounced

Indicates that the recipient's mail server permanently rejected the email.

Spam Reported

Indicates that the recipient marked the email as spam.

SMS Reports

Access SMS Reports

1. Navigate to **Reports**.
2. Click **SMS Reports**.

The SMS Reports page will be displayed.

This page provides information about SMS delivery activity and recipient details.

SMS Report Fields

Content

Displays the content of the SMS message that was sent.

Date

Displays the date and time when the SMS was sent.

Recipients

Displays the number of leads selected to receive the email or SMS.

Delivered

Indicates that the SMS was successfully delivered to the recipient.

Benefits of Using Reports

Reports help you:

- Monitor communication activity
- Track recipient engagement
- Identify delivery issues
- Review message history
- Improve communication performance

Conclusion

You have successfully learned how to access and use Email Reports and SMS Reports in AgentRoof CRM.

What is Inbox? How to Manage Emails & SMS from the Inbox?

What Is Inbox?

The Inbox provides a centralized location for managing all email and SMS communications with leads.

From the Inbox, you can:

- View incoming emails and SMS messages from leads.
- View sent emails and SMS messages.
- View scheduled emails and SMS messages.
- Review complete communication history with leads.
- Send new emails and SMS messages.
- Reply to existing email conversations.
- Continue SMS conversations with leads.

Access Inbox

1. Click **Inbox** from the top menu.

The Inbox page will be displayed.

Inbox Tabs

The Inbox contains two tabs:

Email

Displays all email communications with leads.

SMS

Displays all SMS communications with leads.

Select the desired tab to view the corresponding communication history.

Send a New Email

1. Navigate to **Inbox**.

2. Click **Send New Email**.

The compose email window will appear.

3. Select one or more leads.
4. Enter the email details.
5. Specify the email content.
6. Click **Send**.

The email will be sent successfully.

Send a New SMS

1. Navigate to **Inbox**.
2. Click **Send New SMS**.

The compose SMS window will appear.

3. Select one or more leads.
4. Enter the SMS message.
5. Click **Send**.

The SMS will be sent successfully.

View Inbox, Sent, and Scheduled Communications

Both Email and SMS tabs allow you to view communications based on their status.

Available views include:

- Inbox
- Sent
- Scheduled

To change the view:

1. Click the dropdown menu.
2. Select the desired option.

Inbox

Displays communications received from leads.

Sent

Displays communications sent by the realtor.

Scheduled

Displays communications that are scheduled to be sent at a future date.

Send an Email to a Specific Lead

1. Navigate to the **Email** tab.
2. Locate and select the desired lead.

The complete email history for the selected lead will be displayed.

4. Click **Compose**.
5. Enter or modify the email content.
6. Click **Send**.

The email will be sent successfully to the selected lead.

Reply to an Email

1. Open the desired email conversation.
2. Locate the email received from the lead.
3. Click **Reply**.
4. Enter your response.
5. Click **Send**.

The reply will be sent successfully.

SMS Conversations

1. Navigate to the **SMS** tab.
2. Select a lead.

The complete SMS conversation history for the selected lead will be displayed.

Send a New SMS to a Specific Lead

1. Locate and select the desired lead.
2. Click **Compose.**
3. Enter the message content.
4. Click **Send**.

The SMS will be sent successfully.

Continue an Existing SMS Conversation

1. Select the message field at the bottom of the conversation.
2. Enter your message.
3. Press Enter or click Send.

The message will be delivered to the lead successfully.

You have successfully learned how to use Inbox in AgentRoof CRM.