

# 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**

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## 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.

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Revision #5

Created 2026-06-15 06:47:19 UTC by AgentRoof

Updated 2026-06-22 18:38:52 UTC by AgentRoof