

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.

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