

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**.
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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.

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