

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.