

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.

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