

# How to use the SMS Inbox in CRM

1 Navigate to the **SMS Inbox**.

Click "**Communications**"

The screenshot shows the CRM interface with the 'Communications' menu item highlighted in the top navigation bar. The main content area displays a welcome message for 'Tim' and a table of tasks.

Today's events

Time	Name
10:30	Viewing - 1 Hayday Close, Yawnton, Kidlington, Oxfordshire, OX5 1FS

My tasks

Status	Name	Priority	Start date	Due date
Not Started	<u>13</u>	High	13/Aug/2021	13/Aug/2021
Not Started	<u>14</u>	High	14/Aug/2021	14/Aug/2021
Not Started	<u>demojt</u>	High	23/Nov/2021	23/Nov/2021

## 2 Click "SMS Inbox"

The screenshot shows the IAM Property Communications dashboard. The navigation bar includes 'My day', 'Lettings', 'Sales', 'Accounts', 'Reporting', and 'Communications'. The 'Communications' section is active, showing a grid of communication tools: SMS Inbox (highlighted), Email Tracker, Mail Merge, Email Merge, E-Sign, Marketing toolkit, and SMS Merge. Below this, there are two sections: 'Today's events' and 'My tasks'.

Time	Name
00:30	Viewing - 1 Hayday Close, Yeanton, Kullington, Oxfordshire, OX5 7FS

Status	Name	Priority	Start date	Due date
<input type="checkbox"/> Not Started		High	13/Aug/2025	13/Aug/2025
<input type="checkbox"/> Not Started		High	14/Aug/2025	14/Aug/2025
<input type="checkbox"/> Not Started	demo2	High	23/Nov/2025	23/Nov/2025

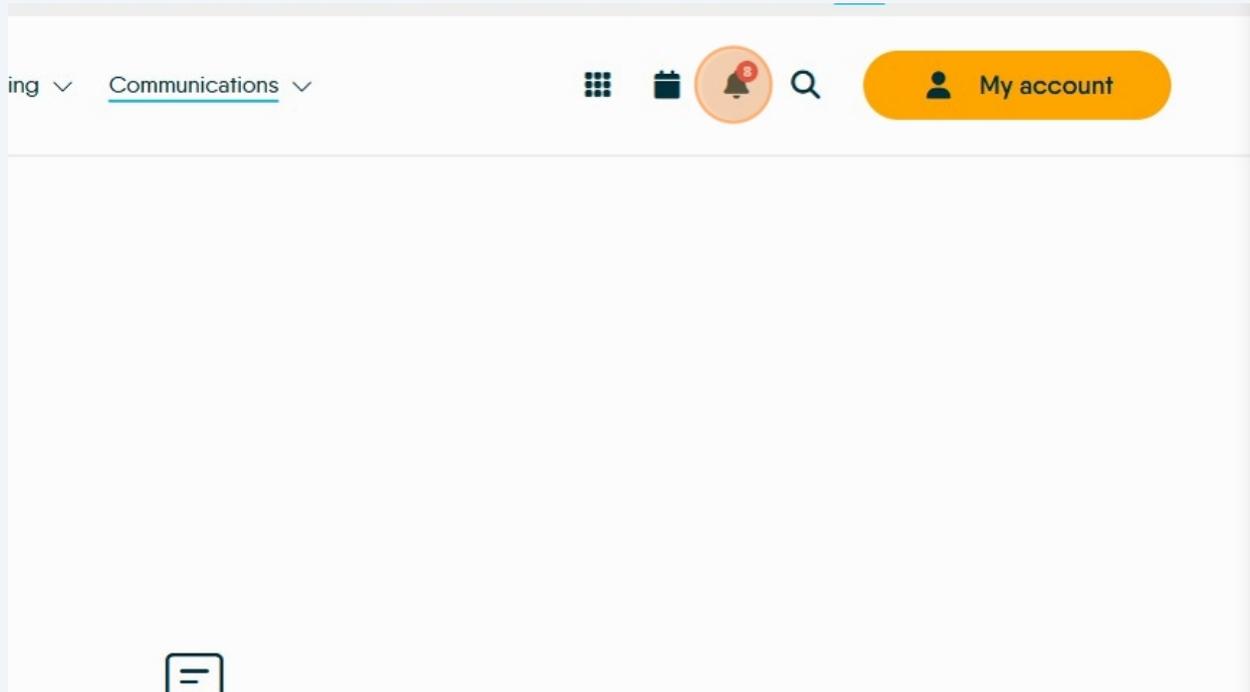
## 3 In the **SMS Inbox**, you will see all your conversations.

New messages will be marked with an orange dot.

The screenshot shows the IAM Property SMS inbox. The 'SMS' header is highlighted. The inbox shows a list of messages from Rodney Mullen, Tori King, Preston Garvey, Paul Wood, Dwight Schrute, and Dave Cosmo. The message from Rodney Mullen is highlighted with an orange dot. The message text is: "The viewing at 14:00 is now confirmed. Thanks!".

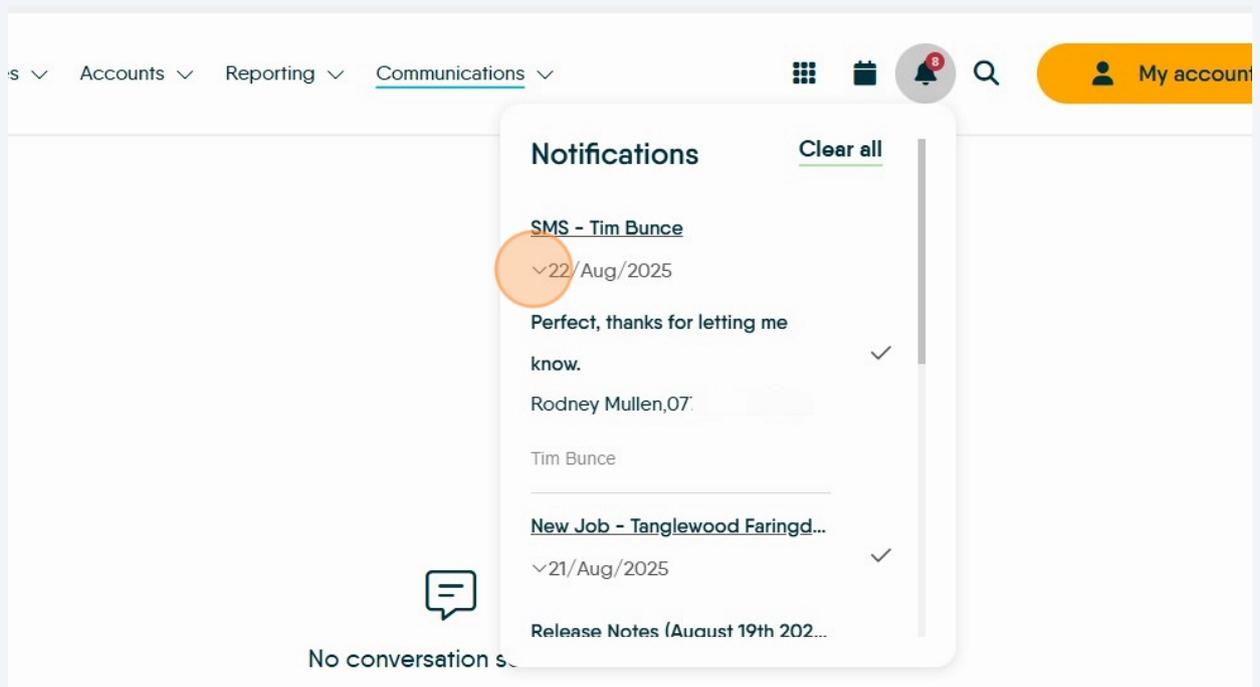
Name	Date	Message
Rodney Mullen	22/08/2025	The viewing at 14:00 is now confirmed. Thanks!
Tori King	22/08/2025	Thanks
Preston Garvey	19/08/2025	Hello
Paul Wood	19/08/2025	Hi Paul , Would you like to discuss auction?...
Dwight Schrute	06/08/2025	10 the street , , UG5 9SD, UK x Mr Schrute...
Dave Cosmo	06/08/2025	Hi Tim , give me a call on , I have a property yo...

4 If a recipient responds to your message, you will get a **notification** within CRM.



5 Click the "**Notification**" icon.

You can also expand the notification for a preview of the message.



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To view the message in full, navigate to the **SMS Inbox** and click into the conversation.

The screenshot shows an SMS inbox interface. On the left is a list of messages with sender names and dates. The main area shows a detailed view of a conversation with a contact named 'Tim Bunce'. The messages in the conversation are: 'The viewing at 14:00 is now confirmed. Thanks!' (sent 22/08/2025 12:22) and 'Perfect, thanks for letting me know.' (received 22/08/2025 14:32). At the bottom of the conversation view, there is a text input field with a cursor and a 'Send' button. An orange circle highlights the input field.

Date	Sender	Message
Today	Rodney Mullen	Perfect, thanks for letting me know.
22/08/2025	Tori King	Thanks
19/08/2025	Preston Garvey	Hello
19/08/2025	Paul Wood	Hi Paul , Would you like to discuss auction?...
06/08/2025	Dwight Schrute	10 the street , , UG5 9SD, UK x Mr Schrute...
06/08/2025	Dave Cosmo	Hi Tim , give me a call on , I have a property yo...
30/07/2025	Tori King	Hi Tori King Please see your new email on our...

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You can respond in the **SMS Inbox** conversation chain.

This screenshot is identical to the one above, but the text input field at the bottom now contains the text 'No problem, see you then.' and the 'Send' button is highlighted with an orange circle.

## 8 To remove the orange "new message" indicator, click "Mark as actioned"

PLEASE NOTE: new records may take upto 24hrs to appear in Global Search. Please continue to use dashboard search for new records in the meantime.

My day Lettings Sales Accounts Reporting Communications My account

Filter

Rodney Mullen  
Replying as 07

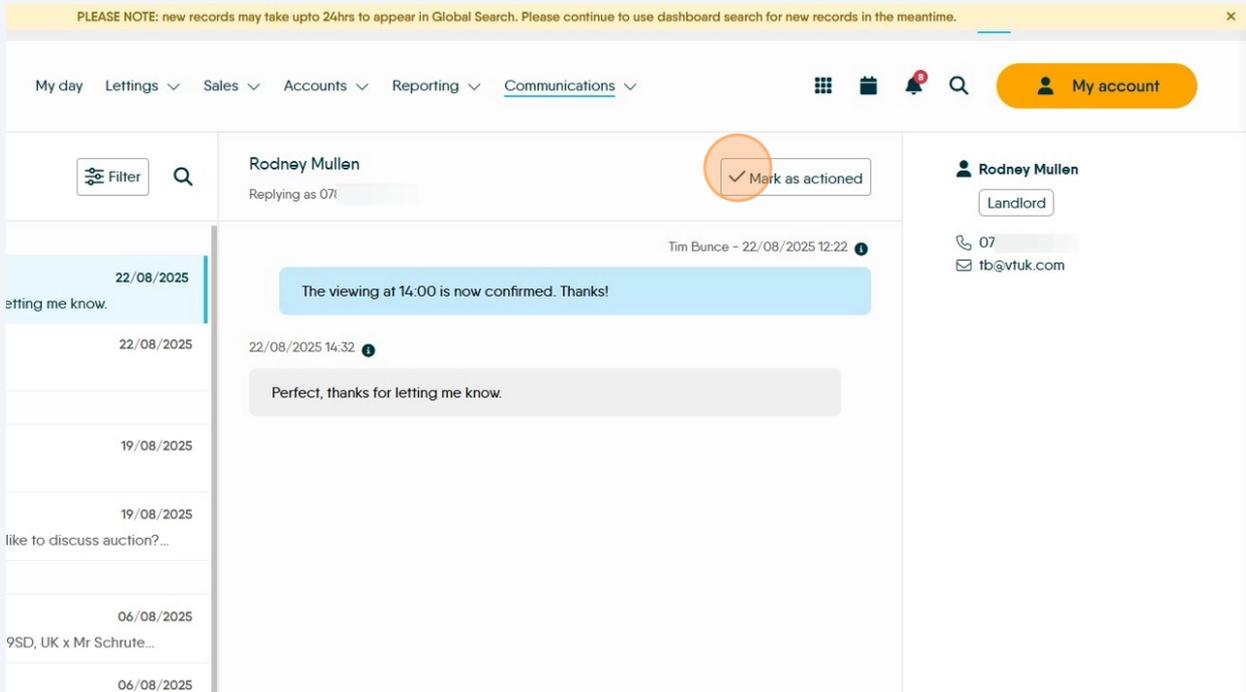
Tim Bunce - 22/08/2025 12:22

The viewing at 14:00 is now confirmed. Thanks!

22/08/2025 14:32

Perfect, thanks for letting me know.

Rodney Mullen  
Landlord  
07  
tb@vtuk.com



## 9 Messages sent and received in the SMS Inbox will also appear in the Journal.

Sort Journal

Start 22/05/2025 End 22/08/2025

Search

Clear filters

Rodney Mullen

Tim Bunce

Tom Herzig

Email

File

SMS

Task

TB  
Tim Bunce  
22/08/2025 14:38:32  
SMS

No problem, see you then.

Landlord - Mr Rodney Mull

RM  
Rodney Mullen  
22/08/2025 14:32:00  
SMS

Perfect, thanks for letting me know.

Landlord - Mr Rodney Mull

TB  
Tim Bunce  
22/08/2025 12:22:17  
SMS

The viewing at 14:00 is now confirmed. Thanks!

