Inbox

The **Inbox** is a centralized communication hub where you can manage all conversations with your leads across multiple channels (Email, LinkedIn, and Tasks). It has been enhanced with AI to help you organize conversations, track every interaction, and reply faster with ready-to-send AI drafts.

Its key purpose is to enable users to view, filter, respond to, and organize all interactions in a single place.

Permissions & Configuration

Access to conversations is determined by user permissions managed by Admins:

- **Full Access:** Users with access to "All Identities" can view all conversations in the Inbox.
- **Limited Access:** Users with access to specific identities only will only see conversations related to those identities.

⚙️ **Configuration Path:** *Settings > Edit User Permissions > Campaign Tab > Identities Access* .

Interface Overview

The Inbox interface is divided into four main columns to streamline your workflow:

- **Column 1:** Folders & Tags (Sidebar)
- **Column 2:** Conversations (Message List)
- **Column 3:** Chat View (Conversation Timeline)
- **Column 4:** Contact Details (Side Panel)

Folders & Tags (Sidebar) 📂

The sidebar is your primary navigation tool, organizing your workload into Folders and Tags.

📁 Folders

Folders help you focus on what matters most by categorizing conversations based on their state.

- **Inbox:** Shows active conversations with at least one reply. Use this to centralize all ongoing interactions.
- **AI Drafts:** Displays conversations where AI has generated a suggested reply. The AI Draft appears automatically in the composition box, allowing you to review and send.
- **Unread:** Contains messages you haven't opened yet.
- **Scheduled:** Shows messages planned for future delivery.
- **Sent:** Displays conversations where you have sent at least one message.
  - *Note:* LinkedIn connection requests sent with a note (InMail) only appear here *after* acceptance.

🏷️ Tags

Tags allow you to categorize and filter conversations based on context. A conversation can have multiple tags simultaneously. Clicking a tag in the sidebar filters your view to show only conversations with that tag.

✨ AI Tags (Auto-Tagged)

The system automatically applies tags based on the lead's intent. These appear with a **sparkle icon** and show as "auto-tagged" events in the timeline .

- **Included AI Tags:** *Interested, Not Interested, Bad Timing, Meeting Booked, Not the Target Persona, Out of Office, Referred*.
- **Reasoning:** You can hover over an AI tag to see a tooltip explaining why it was applied (e.g., "Explicitly declines due to current timing...").
- **Custom AI Tags:** You can create your own AI tags by assigning a sentiment (Neutral, Positive, Negative) and adding a custom AI prompt so the system knows when to apply it .

🛠️ Manual Tags

Users can create custom tags with unique names and colors. These appear as "Tagged as" events in the timeline, distinguishing them from AI tags.

Rules & Compatibility

- **Dynamic Updates:** Tags update automatically as the conversation evolves; old tags may be removed and new ones added.
- **Compatibility Matrix:** The AI uses a compatibility matrix to ensure accuracy (e.g., a lead can be both "Interested" and "Bad Timing") .

Conversations (Message List) 💬

This column displays all conversations matching your selected folder or filter.

Conversation Card Details

Each conversation preview includes:

- **Contact Info:** Name, Job Title, and Company .
- **Visual Indicators:**
  - **Blue Dot:** Unread message.
  - **Badges:** Colored badges for tags.
  - **Channel Icons:** Indicates if the chat is via Email or LinkedIn.
- **Preview:** First ~90 characters of the last message + Timestamp.
- **ICP Score Badge:** Indicates lead fit (Green = High, Yellow = Medium, Red = Low/Disqualified).

🔍 Search & Filters

You can apply multiple filters simultaneously to refine your list.

- **Available Filters:** Status (Active, Paused, Completed), Tags, Channel (LinkedIn, Email, Tasks), Campaign, Company, ICP Score, and Date Range.
- **How to use:** Click the filter icon (top right), select criteria, and view them as chips above the list.

✨ Bulk Actions

Select multiple conversations using the checkboxes to reveal the action toolbar :

- **Mark as Read/Unread:** Change status in bulk.
- **Apply/Update Tags:** Add or remove tags from selected conversations.
- **Pause Conversations:** Stops campaign activity for selected leads (only affects active, non-finished conversations).
- **Export:** Download selected conversations to CSV or sync to CRM. Includes an option to download full transcripts.

Chat View (Timeline) 🗣️

This view shows the full chronological history of all interactions, including messages, tasks, and campaign activities.

Timeline Elements

- **Messages:** Emails and LinkedIn DMs with sender avatars.
- **Audio Messages:** LinkedIn voice notes with playback controls.
- **Campaign Activity:** Logs actions like "Visited profile" or "Email opened".
- **Tasks:** Displays task descriptions, due dates, and completion controls.
- **Translation:** You can translate incoming messages to your preferred language to understand global leads faster.

Sending & Replying

The composition box allows you to choose the **Channel** (Email vs. LinkedIn) and the **Sender Identity** directly from the inbox .

📧 Email Features

- **Rich Text Editor:** Bold, Italic, Underline, Lists.
- **Attachments:** Images (JPEG, PNG, GIF) and files (PDF) up to 5.0 MB. *Note: Files are sent as links to prevent spam/bounce issues* .
- **Signatures:** Automatically included.

👔 LinkedIn Features

- **Text Only:** Plain text (LinkedIn limitation) with an 8,000 character limit .
- **Attachments:** Images and PDFs supported (Max 2.0 MB) .

- **Emoji Reactions:** React to LinkedIn messages with emojis directly from the inbox.
- **Open in LinkedIn:** Option to view the thread in a new browser tab.

🤖 AI Drafts & Suggestions

If the AI detects a positive or engaging message, it generates a draft.

- **Suggestion Text:** Appears inside the text box.
- **Tap to Edit:** Load the suggestion to review and personalize it.
- **Directly Send:** Send the AI response immediately.

🕒 Scheduling Messages

1. Compose your message.
2. Click the **expand icon** next to Send.
3. Choose a time:
    - **Quick Options:** Today (9AM, 1PM, 6PM) or Tomorrow (9AM, 1PM) .
    - **Custom:** Pick any future date/time.
4. **Management:** Scheduled messages appear in the timeline with "Send Now" and "Cancel" buttons.

Contact Details (Side Panel) 👤

Displays complete lead and company information. Toggle this panel by clicking the lead's name.

Header Actions

- **Pause Conversations:** Pause at contact or company level.
- **Open in CRM:** Direct link to the CRM record. If connected to both Contact and Lead, a dropdown allows you to choose .
- **More Options (3 dots):** Add to Blocklist, Add to another campaign, Create Task .

Contact & Company Information

- **Details:** Email (with verification status), Phone, Job Title, and Location .

- **Enrichment:** Option to enrich missing data directly here.
- **Work History:** Lists previous roles and companies with tenure duration to help you personalize replies.
- **Company Stats:** Employee count, growth rate, and a count of other contacts from the same company .

Activity & Sync

- **Activity Timeline:** Logs interactions (opens, clicks, replies) from the last 19 months.
- **CRM Sync:** Shows "Resync" button or "Enable Sync" if not connected .
- **Campaign Status:** Shows all campaigns the lead is enrolled in (In Progress, Paused, Finished). Hover over "In Progress" to pause specific campaign messages .