Smart Inbox - Technical Documentation

1. Overview

What is the Inbox?

The Inbox is a centralized communication hub where users manage all conversations with their leads across multiple channels (Email, LinkedIn and Tasks). It unifies sales communication into one interface for easier outreach, follow-up, and conversation management.

Key Purpose

Enable users to view, filter, respond to, and organize all conversations with contacts in a single place.

2. Permissions

Admins can manage user access to identities, which determines which messages and campaigns a user can view or send from.

- If a user has access to all identities, they can view all conversations in the Inbox.

- If a user has access to specific identities only, they will only see those identities' conversations.

Configuration path:

Settings > Edit User Permissions > Campaign Tab > Identities Access

3. Interface Layout

The Inbox interface is divided into four main columns:

1. **Column 1:** Folders (Sidebar)

2. **Column 2:** Conversations (Message List)

3. **Column 3:** Chat View (Conversation Timeline)

4. **Column 4:** Contact Details (Side Panel)

4. Column 1: Folders (Sidebar)

Folder	Description	Use Case
Inbox	Shows active conversations with at least one reply.	Centralize all ongoing interactions.
AI Draft	Displays conversations where AI has generated a suggested reply. The AI Draft appears automatically in the composition box.	Review and use AI-generated responses.
Unread	Contains conversations marked as unread. Automatically updates when opened.	Focus on new, unseen messages.
Scheduled	Shows messages scheduled for future delivery.	Monitor upcoming automated sends.
Sent	Displays conversations where you've sent at least one message.	
Note: LinkedIn requests with a note (InMail) appear only after acceptance.	Review all engaged conversations.	

Tags

What Are Tags?

Tags (manual or AI-generated) categorize and organize conversations.

A conversation can have multiple tags simultaneously.

How Tags Work

Tags help organize conversations by categorizing them based on context. Conversations can have multiple tags applied simultaneously.

- Users can create custom tags with unique names and colors.

- Tags can be applied manually or automatically by AI.

- Clicking a tag in the sidebar filters conversations by that tag.

- Each tag displays a count badge indicating how many conversations use it.

AI Tags

The system automatically applies essential AI tags that detect the most common conversation outcomes:

Included AI Tags:

Interested, Not Interested, Bad Timing, Meeting Booked, Not the Target Persona, Out of Office, Referred.

- AI provides reasoning for each applied tag (visible via tooltip on hover).

  Example:

  Tag: Bad Timing

  Reason: "Explicitly declines due to current timing and indicates future openness (e.g., 'Maybe another time')."

- AI-generated tags display a sparkle icon ✨

- In the activity timeline, AI-applied tags appear as "auto-tagged" events, indicating that the system applied them automatically.

- Each AI tag also includes a reason tooltip explaining why it was applied (e.g., "Explicitly declines due to current timing and indicates future openness").

User created AI Tags:

A part from included tags users can create AI Tags from the Inbox. Each tag allows you to:

- Assign a sentiment category: Neutral, Positive, or Negative.

- Add a custom AI prompt (so the system knows when to apply it).

- Enabling auto tagging

  Important: AI tags must have a valid prompt before activation.

Tag Compatibility Rules

To ensure accuracy, AI uses a **compatibility matrix**:

- A conversation can have **multiple tags** (e.g., *Interested* and *Bad Timing*).

- Tags are automatically **updated** as the conversation evolves, old tags may be removed and new ones added.

- This ensures analytics remain current and contextually accurate.

Manual Tags

Users can create and manage their own tags manually.

- Manual tags appear as "Tagged as" events in the activity timeline, showing the user who applied it and the timestamp, differentiating them from AI tags, which appear as "auto-tagged".

5. Column 2: Conversations (Message List)

Displays all conversations matching the selected folder or filter.

Conversation Preview Includes

- **Contact Information:**
  - Name
  - Job title
  - Company
- **Visual Indicators:**
  - **Blue dot** → Unread message
  - **Tags** → Colored badges with tag names
  - **Channel icons** → Email / LinkedIn (Tasks are not shown)
- **Last Message Preview:**
  - First ~90 characters of the last message
  - Timestamp
- **ICP Score Badge:**
  - **Green:** High fit
  - **Yellow:** Medium fit
  - **Red:** Low or disqualified

Search and Filters

Use the **search bar** or apply **filters** to find specific conversations.

Bulk Actions

1. Select multiple conversations using checkboxes or "Select All".

   a. The checkbox appears after a slight delay to preserve good UX while scrolling in the list of conversations.

2. When selected, a toolbar appears with:

Action	Description
Mark as Read / Unread	Change read status in bulk.
Apply Tags	Add tags to selected conversations (create new tags if needed).
Pause Conversations	Pause by contact or company (stops campaign activity). Will only affect converstions that are running not finished or replied.
Update Tags	Add or remove tags from all selected conversations.
Export	Export selected conversations to you CRM or download them as CSV. Includes an option to download all conversations transcripts as plain text.

Filters

Filters refine which conversations appear in the middle panel. You can apply multiple filters simultaneously.

Available Filters

Filter	Description
Status	Active, Paused, or Completed.
Tags	Show conversations with selected tags.
Channel	LinkedIn, Email, or Tasks.
Campaign	Filter by specific campaign.
Company	Filter by company.
ICP Score	High, Medium, Low, Disqualified, or Missing Data.
Date Range	Filter conversations with messages sendn within the range.

How to Add Filters:

1. Click the filter icon (top right).

2. Select a filter type and define criteria.

3. Filters appear as chips above the conversation list.

4. Click **X** to remove a filter.

6. Column 3: Chat View (Conversation timeline)

Shows the full chronological history of all interactions with a lead, including messages, tasks, and campaign activities from your entire team.

Note: Access to this complete history depends on user permissions, a user must have the appropriate access rights to view the full timeline of team interactions.

Included Elements

Element	Description
Campaign Activity	Shows campaign actions (e.g., "Visited profile", "Email opened").
Messages	Email and LinkedIn messages with sender avatars and status indicators whether sent manually or auto-generated with AI variables.
Messages can be translated to user's prefered language.	
Audio Messages	LinkedIn voice notes with playback controls.
Tasks	Display task description, due date, notes, and completion controls.
Tag Events	Logs tag changes and indicates whether applied by AI or user.
Actions	Added to blocklist by user - time. / Pause conversations by user - time.
Scheduled Messages	Queued messages with scheduled send time.

New Messages Divider	Blue line separating unread messages from viewed ones.

Sending Messages

Composition Box

Located at the bottom of the chat view. Adapts based on the conversation channel.

Replying and Channel Selection

At the bottom of the chat view, the composition box allows the user to choose whom to reply to when the conversation history includes messages from multiple senders. Additionally, the user can select the channel to respond through.

- If previous messages were sent via Email and LinkedIn, the user can choose which channel to use for the reply.
- This ensures continuity and allows responses to follow the same communication channel as the existing conversation.

Email

- Pre-filled "To" field and subject line.
- Rich text editor with formatting tools. (Bold, Italic, Underline, Ordered list, Bullet list)
- Send images supported (Max size 5.0 MB, Formats jpeg, png and gif)
- Send files as links supported (Max size 5.0 MB, Formats pdf)

Note: In order to prevent spam or bounce issues, all files will be send as a link.

- Email signature automatically included.

LinkedIn

- Plain text only (LinkedIn limitation).
- Character limit: 8,000.
- File attachments supported (Images max size 2.0 MB)
- File attachments (PDF max size 2.0 MB)
- Conversations can be opened in a new browser tab, allowing users to view the full LinkedIn thread directly on the platform.

AI Suggestions

If AI has drafted a reply:

- A suggestion text appears inside the text box.

- **Tap to edit:** Use this option to load the suggested message into the composition box, allowing you to edit and send it.

- **Directly send:** Press the send button to send the suggestion.

Scheduling Messages

1. Compose your message

2. Click the expand icon next to Send.

3. Choose a time:

   - **Quick options**: today or tomorrow at best time.

   - Today has 3 time slots (9AM, 13PM, 18PM) if one has already passed the next one will be suggested.

   - Tomorrow has 2 time slots (9AM and 13PM). Only the 9AM will be shown unless all 3 today options are impossible (we are passed the 18PM mark) so both for tomorrow will be shown

   - **Custom time**: Pick any future date/time

4. When a message is scheduled, it appears in the timeline with the scheduled time and displays action buttons: Send Now to send immediately, and Cancel to remove the scheduled message.

7. Column 4 – Contact Details (Side Panel)

Displays complete lead and company information with actionable shortcuts.

NOTE: by default this columns is hidden. It can be opened by clicking the name of the lead at the top of the messages or with the button in the top-right corner.

Header

- **Contact summary:** Name, position, company.

- **Action buttons:**

  - **Pause conversations** (contact or company level)

- **View LinkedIn profile**
- **Open in CRM :**
- Disabled if the contact is not in CRM.
- When a CRM is active, a button appears that opens CRM records. If the contact has both Contact and Lead associations, a dropdown menu lets you choose which one to open. If there's only one association, the button opens it directly. If there are no associations, the button is disabled.
- **View in table**
- **Add Tags** (manual or AI)

In the more menu under the 3 dots:

- **Add to blocklist (contact/company)**
- **Add to another campaign**
- **Create Task**

Note: Once performed, actions like Add to Blocklist (contact/company), Create Task, and Add Tags (manual or AI) are recorded in the activity timeline, showing the user who performed the action and the timestamp.

Contact Information

- Email (with verification status)
- Phone number
- Enrichment option (if missing contact data)
- ICP score (with explanation)
- Job title and location
- **CRM Sync:**
  - Shows owner and last sync time.
  - "Resync" button if connected.
  - "Enable Sync" button if not yet connected (opens CRM export modal).

Company Information

- Company name

- Employee count and growth rate

- Number of contacts from this company in Genesy (with "View Contacts" and "Add Contacts" CTAs)

- Company score

- Website, LinkedIn, phone, and HQ location

Activity Timeline

Chronological log of all interactions in the last 19 weeks months:

- Messages sent/received

- Campaign steps

- Profile visits, requests

- Email opens, invitation accepted, link clicks, etc

Campaign Status

Displays all campaigns where the lead is enrolled:

Field	Description
Campaign Name	Linked campaign name.
Current Status	In Progress, Paused, Finished, or Replied (hover to pause/resume).

Note: For In Progress campaigns, users can pause the conversation by hovering over the status and selecting the pause option, allowing temporary control over campaign messages.

Work History

Lists previous roles and companies, including tenure duration — helpful for understanding the contact's career trajectory.