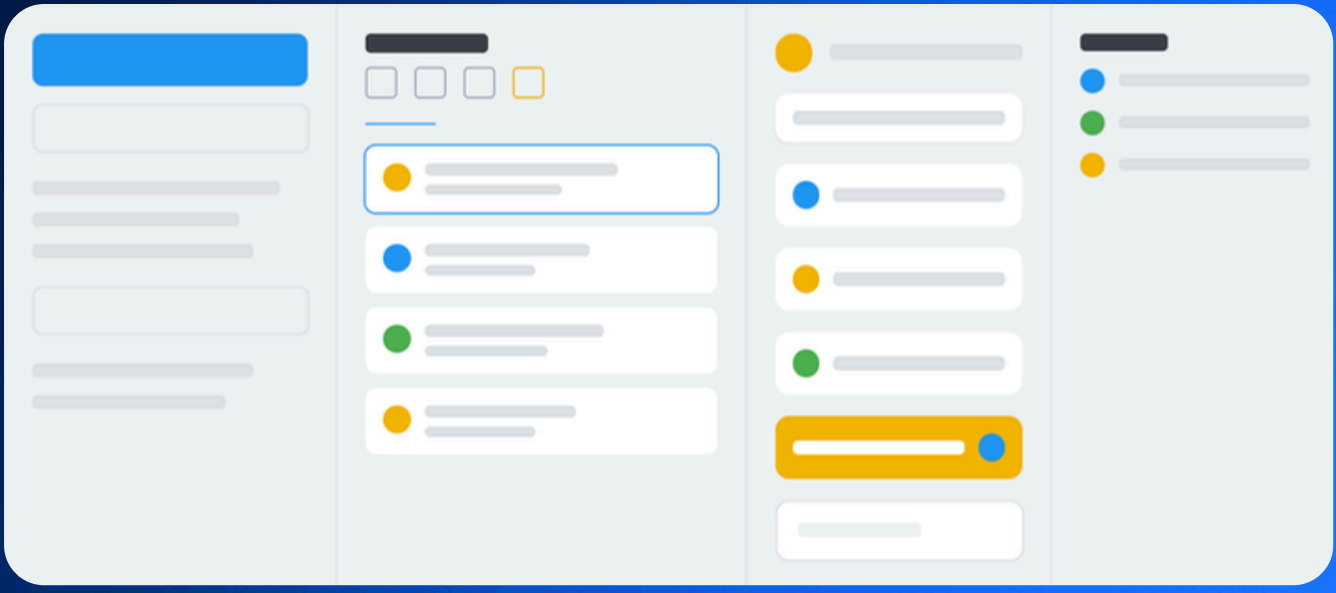
REFERENCE GUIDE

Conversations

Your Complete Guide To Messaging, Follow-Up, And Response Time



A general companion to the Conversations feature: what it is, how it works, and how to get the most out of it as your account grows.

CONVERSATIONS

The Unified Inbox

What It Is

Conversations is where every message with a contact lives, no matter which channel it came in on. Text, email, and other channels all land in one thread, organized into four working columns so you always know what needs a reply.

How It Works For Your Business

- The four columns are: a filter and navigation menu, the conversation list, the open conversation thread, and the contact's details panel.
- Every conversation is tied to one contact record, so the full message history stays together even as the conversation moves across channels.
- Use the reply channel selector inside a conversation to choose exactly how your response goes out, whether that's text, email, or another connected channel.
- Archiving a conversation clears it from your active list without deleting anything. Deleting removes the conversation and its history for good, so treat that as a one-way action.
- Automations like missed-call text back and first-response replies can open or continue a conversation automatically, so a new lead never sits unanswered.

Think of Conversations as your one inbox for every channel. Everything about a contact lives on that same thread.

The Unified Inbox – Tips & Guidelines

Tips

- Check the conversation list regularly. New messages sort to the top, so recency alone tells you what needs attention.
- Use the filter and navigation column to narrow the list down to unread, unassigned, or a specific channel when the inbox gets busy.
- Open the contact details panel before replying to a new thread, so you have context on who you're talking to.
- Set up a missed-call text back and a first-response automation so no incoming message goes unanswered while you're away.

DO

- Reply from inside the correct thread so history stays attached to the right contact
- Use archive for conversations you're done with but may need again
- Confirm the reply channel before sending, especially for a contact with multiple channels on file
- Set up automated first replies for common channels

DON'T

- Delete a conversation unless you're certain you'll never need that history again
- Ignore the filter options and scroll through everything unsorted
- Reply on the wrong channel just because it's the one already open
- Assume a missed call was seen if no one replied to the automated text

Inbox, Chat & Views

What It Is

Starting a conversation, working your inbox in a consistent order, and saving your own custom views are what turn a busy stream of messages into something you can manage every single day, not just when things are quiet.

How It Works For Your Business

- Use New Conversation to message a contact directly, or to start a private internal chat with one or more teammates.
- Your inbox sorts into All, Unread, Recent, and Starred, plus Assigned To Me and Followed By Me, both set from the contact record itself.
- Internal chat is completely separate from contact conversations. It's private, visible only to the people in that thread, and the right place to coordinate about a contact without them seeing it.
- A View is a saved filter combination, like every conversation tagged "active" or every conversation where you're mentioned, ready in one click instead of rebuilt from scratch each time.
- Live Chat lets you talk with a contact in real time when they're active on your site, on top of the channels you're already using.

Check unread first, every time. The sooner you respond, the better things go.

Inbox, Chat & Views - Tips & Guidelines

Tips

- Mark a conversation as read once you've actually handled it, so your unread count stays a true signal of what's left.
- Save a draft message when you're not ready to send, instead of losing a half-written reply.
- Use CC and BCC in the email composer when a reply needs to loop in or quietly copy someone else.
- Star anything you're not sure about instead of leaving it unread. It's the simplest way to make sure nothing gets forgotten.

DO

- Build a View for any filter you check daily, like a tag or your mentions
- Use internal chat for any team discussion about a contact
- Check a contact's engagement score when deciding how to follow up
- Attach files directly in a conversation instead of sending them elsewhere

DON'T

- Mix team chatter into a contact-facing conversation thread
- Rebuild the same filter by hand every day instead of saving it as a View
- Leave messages unread once you've already replied
- Forget to check Starred for anything you meant to follow up on later

Conversation Threads

What It Is

The conversation thread is where the back-and-forth with a contact actually happens. It brings together channel sorting, a reply composer, snippets and trigger links, and quick access to custom values, all in one place.

How It Works For Your Business

- Sort a thread by channel when a contact has messaged you more than one way, so you can see just the texts, or just the emails, at a glance.
- The reply composer is where you write and send your response, and it supports inserting snippets and trigger links directly into what you're typing.
- Custom values let you personalize a reply automatically, pulling in details like a contact's name or another field without retyping them.
- Marking a conversation as read clears it from your unread list once you've handled it, keeping your active queue accurate.
- A payment request can be sent directly from a conversation thread, letting a contact pay on the spot without leaving the chat.
- The workflow trail shows which automations have touched this conversation, so you can see what already happened before you reply.

A fast, personal reply usually starts with a good snippet and the right custom value already built in.

Conversation Threads – Tips & Guidelines

Tips

- Check the workflow trail before replying if an automation may have already reached out, so you don't duplicate a message.
- Use snippets for anything you type often. It's faster and keeps your wording consistent.
- Add an internal note when you need to leave context for a teammate without sending anything to the contact.
- Send a payment request directly from the thread when a contact is ready to pay, instead of sending them elsewhere.

DO

- Sort by channel when a contact has multiple open threads
- Use custom values to personalize replies automatically
- Review the workflow trail before sending a manual reply
- Mark a conversation as read once you've fully handled it

DON'T

- Send the same generic reply without checking for context first
- Forget to leave an internal note before handing a conversation off
- Ignore what automations have already sent on this thread
- Leave a conversation marked unread once you're actually finished with it

Contact Details

What It Is

The contact details panel sits alongside every conversation and holds the full picture of who you're talking to: ownership, tags, activity, and quick actions you can take without leaving the thread.

How It Works For Your Business

- Owner and followers show who's responsible for this contact and who else should stay in the loop on updates.
- Tags and custom fields let you label and organize contacts so you can find and filter them later.
- Do Not Disturb can be turned on for a contact who has asked not to be messaged, and your account will respect that setting.
- Quick actions let you add a note, create an opportunity, or set a follow-up task right from the panel, without switching screens.
- The full record view shows a contact's complete activity and associations, including past conversations, tasks, and opportunities.

A quick look at contact details before you reply often tells you everything you need to personalize the conversation.

Contact Details - Tips & Guidelines

Tips

- Add a quick note mid-conversation so important context isn't lost once the thread moves on.
- Create an opportunity directly from a conversation when a contact shows real interest, so it doesn't get missed later.
- Set a follow-up task before you close out a conversation you're not fully done with.
- Check the activity card on a contact for a fast history of past conversations and interactions before you reply.
- Use tags consistently across contacts so filtering and reporting stay accurate.

DO

- Set Do Not Disturb the moment a contact asks not to be contacted
- Add or update the owner when responsibility for a contact changes
- Create a follow-up task instead of trying to remember to circle back
- Check the full record before assuming this is a first-time contact

DON'T

- Message a contact marked Do Not Disturb
- Leave a contact unassigned when someone should clearly own it
- Skip tagging because it feels like an extra step
- Close a conversation with an open commitment and no follow-up task set

Manual Actions

What It Is

A manual action is a call or text task that requires a real person to carry it out, rather than something your account sends automatically. It shows up as a task queue you or your team can work through in order.

How It Works For Your Business

- A call manual action prompts someone to place an actual phone call to the contact, while a text manual action prompts a real, personally written message.
- Every manual action has an assignee, the team member responsible for completing it.
- Use Let's Start to launch into your queue of manual actions and work through them one at a time without hunting for the next one.
- Filter your manual action queue by type or assignee so you can focus on just calls, just texts, or just your own tasks.
- Manual actions are commonly triggered by workflows, for example queuing a personal call task after a new lead comes in.

Manual actions exist for the moments automation shouldn't handle alone: a real call, a real conversation, a real human touch.

Manual Actions - Tips & Guidelines

Tips

- Use Let's Start at the beginning of a work session to move through your queue efficiently instead of picking tasks at random.
- Assign manual actions to a specific team member whenever a task needs clear ownership.
- Filter your queue by type when you're focused on one kind of outreach, like calls only.
- Pair a manual action with a workflow trigger for moments that genuinely need a personal touch, like a brand-new lead.

DO

- Assign every manual action to a clear owner
- Use Let's Start to work through your queue in order
- Reserve manual actions for outreach that benefits from a real, personal touch
- Filter the queue so your team can focus on their own tasks

DON'T

- Let manual action tasks pile up unassigned
- Treat a manual action like it will send itself
- Skip the queue and rely on memory to find pending tasks
- Overload manual actions with routine messages better suited to automation

Snippets For Text & Email

What It Is

A snippet is a saved block of text you can insert into a reply instead of typing it out again. Snippets work for both text and email, and they can include custom values so each message still feels personal.

How It Works For Your Business

- Build separate email snippets and text snippets, since tone and length usually differ between the two channels.
- Insert a custom value, also called a placeholder, into a snippet so a detail like a contact's name fills in automatically.
- Organize snippets into folders by purpose, such as follow-ups, reviews, or referrals, so your team can find the right one fast.
- Duplicate an existing snippet as a starting point when you need a close variation instead of writing one from scratch.
- Snippets can be inserted from anywhere you're replying to a contact, including directly inside the conversation composer.

Send a test message before rolling a new snippet out to your whole team, so you can confirm the custom values fill in correctly.

Snippets - Tips & Guidelines

Tips

- Use a test send to confirm a new snippet's custom values fill in correctly before your team relies on it.
- Keep separate folders for email and text snippets so the right one is easy to find under pressure.
- Write snippets for your most repeated replies first: referrals, review requests, and common follow-ups.
- Use quick replies on Facebook and Instagram messages for the same speed benefit snippets give you elsewhere.
- Review your snippet library periodically and archive anything that's gone stale or out of date.

DO

- Test a snippet's custom values before rolling it out
- Organize snippets into folders by purpose
- Duplicate a close match instead of starting from a blank snippet
- Update snippets as your messaging or offers change

DON'T

- Send an untested snippet with custom values to a real contact
- Let every team member freestyle instead of using shared snippets
- Mix email-toned language into a text snippet
- Leave outdated snippets active in the shared library

Trigger Links

What It Is

A trigger link is a trackable link you can send in a conversation, email, or campaign that fires an action, like a workflow or automation, the moment a contact clicks it.

How It Works For Your Business

- A custom value trigger link can carry a specific value along with the click, useful for tracking which offer or campaign a click came from.
- Trigger links can be permanent, meaning the same link keeps working for future contacts and campaigns, not just a single send.
- Watch for a Trigger Link Clicked event to know exactly when and by whom a link was opened, so you can follow up right away.
- Add trigger links to your saved snippets so your most-used links are always one click away from any conversation.
- Trigger links can be dropped into campaigns and automations, not just one-off conversations, to track engagement at scale.
- Analytics on a trigger link show total clicks and click sources, which helps you see what's actually landing with contacts.

A trigger link turns a simple click into a signal you can act on immediately, rather than just a link that goes nowhere.

Trigger Links - Tips & Guidelines

Tips

- Save your most-used trigger links into snippets so they're always ready to send.
- Check click analytics regularly to see which links and campaigns are actually getting engagement.
- Use a custom value trigger link when you need to know which specific campaign or offer drove the click.
- Follow up quickly after a Trigger Link Clicked event while the contact's interest is still fresh.

DO

- Track clicks on any link you send in bulk or in campaigns
- Reuse a permanent trigger link across multiple campaigns
- Follow up promptly after a link is clicked
- Review analytics to see what's resonating with contacts

DON'T

- Send an untracked plain link when a trigger link would tell you more
- Ignore click analytics once a link is live
- Wait days to follow up after a high-intent click
- Recreate a new link every time when a permanent one already exists

SLA Settings

What It Is

An SLA, or service level agreement, sets a target response time for conversations so your team knows how quickly a message needs a reply, and so nothing important sits unanswered too long.

How It Works For Your Business

- A common SLA applies one overall response-time target across your account, while a channel-specific SLA sets a different target per channel, like text versus social.
- Timer colors give a visual read at a glance: on track, due soon, and overdue, so priority is obvious without opening every thread.
- A conversation becomes overdue once it passes its SLA target without a reply, which is the clearest signal something needs attention now.
- SLA settings work alongside automated and AI-assisted replies, so a quick automated response can help you stay inside your target while a person follows up.
- Filter and sort your conversation list by SLA status to work the most time-sensitive threads first.

An SLA turns response time from a vague goal into a number you and your team can actually see and manage.

SLA Settings – Tips & Guidelines

Tips

- Set a channel-specific SLA for faster channels like text or social, where contacts expect a quicker reply than email.
- Sort your inbox by SLA status during busy periods so overdue conversations always surface first.
- Use an automated first reply to buy time on fast-moving channels while a team member prepares a fuller response.
- Review overdue conversations regularly as a coaching tool for response-time habits, not just a one-off fix.

DO

- Set realistic SLA targets per channel based on how contacts actually expect a reply
- Sort conversations by SLA status when the queue is busy
- Use timer colors as your at-a-glance priority signal
- Review overdue conversations as a team, regularly

DON'T

- Set the same SLA target for every channel regardless of how contacts use it
- Let a conversation sit past its SLA target without addressing it
- Ignore timer colors and work threads in random order
- Treat SLA as a one-time setup instead of something you check in on

Key Terms Glossary

Unified Inbox
The single place every conversation with a contact lives, across every connected channel.

New Conversation
The button that starts a conversation from scratch, with a contact or a teammate.

Group Chat
A conversation with more than one contact at once, available on a connected SMS number.

My Inbox
Your personal view of conversations: assigned to you, followed by you, or where you're mentioned.

Team Inbox
A wider view of conversations across your account, beyond just your own messages.

Internal Chat
A private chat thread with teammates, separate from any contact-facing conversation.

View
A saved filter combination you can reuse any time with one click.

Live Chat
Real-time chat with a contact who is active on your site.

Reply Channel
The specific channel, such as text or email, a reply will be sent on.

Archive
Removing a conversation from your active list without deleting its history.

Channel Sort
Filtering a conversation thread to show messages from just one channel.

Custom Value
A placeholder that automatically fills in a contact-specific detail, like a name, in a message.

Workflow Trail
A record of which automations have already acted on a given conversation.

Owner
The team member responsible for a contact.

Followers
Team members who stay updated on a contact without owning it directly.

Do Not Disturb
A setting that stops messages from going out to a specific contact.

Activity Card
A quick summary of a contact's past conversations and interactions.

Manual Action
A call or text task that requires a real person to complete it.

Assignee
The team member responsible for completing a manual action.

Let's Start
The feature that launches you into your manual action queue.

Key Terms Glossary (Continued)

Snippet

A saved block of reply text you can insert instead of retyping it.

Quick Reply

A templated response for Facebook and Instagram messages.

Trigger Link

A trackable link that fires an action, like a workflow, when clicked.

Trigger Link Clicked

The event that fires the moment a contact clicks a trigger link.

Overdue

The status a conversation gets once it passes its SLA target unanswered.

Engagement Score

A measure of how actively a contact is interacting with your messages.

Test Send

Sending a snippet to yourself first to confirm it fills in correctly.

Draft Message

A composed reply saved before sending, so you can finish it later.

Permanent Link

A trigger link built to keep working across future campaigns and contacts.

SLA

Service level agreement: a target response time for conversations.

Payment Request

A request for payment sent to a contact directly from a conversation.

Getting The Most From Conversations

1

Work One Inbox

Handle every channel from the same unified thread instead of checking separate apps.

2

Personalize With Snippets

Use snippets and custom values so fast replies still feel personal.

3

Let Automation Cover Gaps

Missed-call text back, first-response automations, and manual actions catch what a person can't get to instantly.

4

Watch Your SLA

Use timer colors and SLA status to make sure nothing important goes unanswered too long.

Conversations works best as one habit: one inbox, fast personal replies, and automation covering the gaps.

Getting Help

- Keep this guide close as you set up snippets, trigger links, manual actions, and SLA settings.
- Come back to it any time a new team member needs to get oriented on Conversations.
- Reach out to your support team if you have a question this guide does not answer.