THE TOOLBOX · BUSINESS HUB OS CRM · LESSON 19

One Inbox — Field Guide

Answer your leads in the Inbox · Watch time 3:02

Every conversation with your leads lands in one inbox. Every text, email, and DM in one list, with the AI working beside you — answering what it knows, handing you what it doesn't, and learning from every answer you give.

WORK THE INBOX — THE STEPS

1. **Open the Inbox.** In your sub-account, click **Inbox** in the left menu. Every text, email, and message from your leads lands here, newest first. A red number means they wrote and you haven't read it yet.
2. **Start with Needs Reply.** Click **Needs Reply** to see everyone waiting on you: a message nobody answered, a missed call, or a question the AI handed to you. Work this list first, every day.
3. **Find anyone fast.** Type in **Search** — a name, a number, or a word they wrote. Filter by channel (Instagram, Messenger, website chat) to see one kind at a time. DM-only contacts stay in Messages until they give you a phone number or an email.
4. **Open the conversation.** The thread is in the middle — texts the AI sent say **Sent by AI**. On the right are the lead's details: call them, book them, see their stage, or turn the AI on or off just for them.
5. **Answer what the AI handed you.** When the AI doesn't know, it stops and marks the conversation **Needs your answer**. Click **Train the AI** — the question is already filled in. Type the answer the way you'd tell a customer, tick **Send this answer as a text** so they get it now, then **Save to Knowledge Base**. The AI knows it for good.
6. **Use the reply ideas.** Not sure what to say? Click the **sparkle** next to the message box and you get three reply ideas. Pick one, change any word you like, then send.
7. **Take over without talking over the AI.** The moment you text a lead yourself, the AI steps back on that lead. When you're done, click **Turn back on** — or set **Auto-resume AI** in Settings → Messaging so it picks back up on its own after you reply.
8. **Add a private note.** Click **Note** under the message box to write what only your team sees — like what they told you on the phone. The customer never sees it.
9. **Hand off, archive, or mark unread. Assign to** gives the conversation (and its appointments) to a teammate. **Archive** puts a finished thread away — the lead stays, and a new message brings it back. **Mark as unread** puts the red dot back so you remember to return.

WHAT GOOD LOOKS LIKE

- **Needs Reply is empty by the end of the day** — nobody who wrote to you is still waiting on an answer.
- **You and the AI never talk over each other** — when you step in, it steps back; when you step out, it resumes.
- **Every AI handoff gets answered once and saved**, so the same question never lands on your plate twice.
- **Finished conversations are archived, not lost** — the lead stays in your CRM and any new message brings the thread right back.