13. How to Send Messages to Clients

«Send a message» allows you to send a private message from the system directly to a client. The client receives a notification (e.g., via their online cabinet or any integrated notifications system), letting them know you've sent them a message.

Messages and notifications can be integrated into the client's environment via API, so clients see your messages in their portal or other integrated system.

Why Use "Send a Message"?

1. **Direct Communication**
   Instantly reach out to clients to resolve support issues, confirm details, or share updates without leaving the CRM interface.
2. **Integrated Notifications**
   Through API integration, messages appear in any client-facing application (web portal, mobile app, etc.), increasing visibility and reducing "missed" communications.
3. **Secure & Auditable**
   Only users granted the **Send a private message** permission can access this feature. Every message is logged with sender metadata for compliance, auditing, and traceability.

Key Use Cases

1. **Support Follow-Up:** Send troubleshooting steps or request additional information to help clients resolve issues quickly.
2. **KYC/Compliance Queries:** Ask for missing verification documents or answers to compliance questions directly within the CRM.
3. **Account Notifications:** Alert clients to policy changes, scheduled maintenance, or service upgrades in real time.
4. **Personalized Outreach:** Deliver tailored offers, onboarding tips, or renewal reminders to individual clients for improved engagement.

Prerequisites:
User Permissions: Ensure your role includes the **Send a private message** permission.
API Integration (Optional): For client-portal notifications, configure the "outgoing message" endpoint in your integration settings.

How It Works

1. Locate the Client:
Navigate to the **Clients** page in the CRM sidebar.
Scroll or use the search bar to find the client you wish to message.
In that client's row, hover toward the far-right **Actions** column until you see the three-dot icon.
Click the three-dot icon to open the actions menu, then choose **Send a message.**

2. Compose Your Message:
A slide-out panel or modal appears on the right side of the screen.
Click inside the text field at the top of this panel (it may display a placeholder like "Type your message…").
Enter your message—this can be free-form text, variables (e.g. `{{firstName}}`), or templates if configured.

3. Send and Notify:
Once your message is ready, click the green **Send** button at the bottom of the panel.
You'll see a brief loading indicator, then a success toast confirming delivery.

Behind the scenes:

1. The message is sent via your CRM's messaging API.
2. If your system is integrated, the client receives an in-portal notification (or email/mobile push) notifying them of your message.
3. All messages are logged in the client's activity history, attributed to your user account for auditing.

> **Note**: The client is notified (only if this is integrated via API with your business) that a manager or staff member has sent them a message.

The message is attributed to the currently logged-in user.

4. Verify Delivery & History:
After sending, you can re-open the panel any time to review sent messages in that session.
For a full conversation history, open the client's **Details** or **Activity Log** drawer—your message will appear there with timestamp and sender metadata.

5. Permissions & Error Handling:
The **Send a private message** action only appears for users granted the appropriate permission. If you don't see it, request access from your CRM administrator.
If sending fails (e.g., API error or network issue), an error toast will appear. You can retry by clicking **Send** again once the issue is resolved.

> **Tip:** Keep messages concise and track all important communications in the client’s activity log for full transparency and a complete audit trail.

Best Practices

1. **Personalize**: Use the client’s name and reference recent interactions.
2. **Actionable**: End with a clear call-to-action (e.g., “Please reply with…”).
3. **Track Responses**: Follow up if the client doesn’t respond within your SLA window.
4. **Archive**: For audit purposes, download message logs periodically via the **Export** feature.

The **Send a Message** action streamlines secure, auditable, and integrated client communication—all from within the CRM. By leveraging API integration, it delivers your messages straight into the client’s environment, ensuring high visibility and engagement without switching contexts or tools. Use it to accelerate support, compliance workflows, and proactive outreach, while maintaining full control over permissions and logging.

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