Shared Inbox (iConnect Inbox)

Keep customer conversations moving when people change

For service and sales teams that share customer conversations

Controlled rollout: conversation workspace shown on demonstration data; each channel is set up and verified per deployment.

Does this sound familiar?

Messages sit with one person, ownership is unclear, and a colleague taking over has to ask the customer to start again.

Replies slow down, customers repeat their story to each new person, and the history of the relationship leaves with the employee.

From the problem to the business gain

Conceptual illustration, not a product screen

The problem	What your team does	What you get	What the business gains
Messages stuck with one person	Take ownership, set the status, reply	An owned thread with history and notes	Continuity when people change

Three practical gains

Less dependence on one colleague

Every conversation has an owner and a status the whole team can see.

Handover without starting again

The thread, notes and customer record stay together when a colleague takes over.

More consistent replies

Agreed templates and shared quick replies keep answers aligned across the team.

What your team does

- ✓ A team lead assigns each conversation to a team member
- ✓ The owner sets it open, pending or closed, with internal notes beside the thread
- ✓ Replies use agreed templates and quick replies

The useful output

- → An owned conversation with a clear status
- → A traceable handover the next owner can read
- → A conversation kept on the customer's record, not on one person's phone

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Ref. 6

What it needs

- **Customer records in iConnect CRM (Controlled rollout)**
  Matched by phone number, never by display name
- **A channel activated for your company**
  Your own WhatsApp Business account; activation and verification pending
- **Team members with roles**
  Who can see, own and reply to conversations
- **Agreed templates and staffed hours**
  Response expectations follow your staffing

What you gain by connecting it

6 → 1 CRM

Configured per deployment

Once a channel is activated, each conversation links to its contact in iConnect CRM (Controlled rollout).

6 ← 5 iSupport AI

Configured per deployment

iSupport AI (Controlled rollout) adds a draft from approved knowledge; a person reviews it before sending.

6 – → 2 iSales

Planned

iSales (Controlled rollout) works from the same contact as the conversation; a direct sales hand-off is planned.

Configured per deployment: built, then set up and verified for your accounts · Planned: illustrative; not implemented yet

How your team uses it

Team lead
Assigns a new conversation
→ A named owner and an open status

Team member
Replies with a template and adds a note
→ A thread with its context beside it

Colleague covering
Opens the thread and the contact
→ A reply that continues, not restarts

What your business gains
Customers do not repeat their story when people change.

Next step

Book a tailored iConnect Inbox demo

We show it on demonstration data, shaped around your workflow, and agree the first scope together.

https://iconsultants.tech/iconnect/demo

Technical detail: iConnect Technical Evaluation Guide

Scan to request the demo