



The Orlo Inbox Best Practices



Orloville



Thank you for bringing this to our attention. We've arranged for a member of our team to take a look at your issue who will get back to you shortly.

Public



Message Actioned

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DM Reply Link

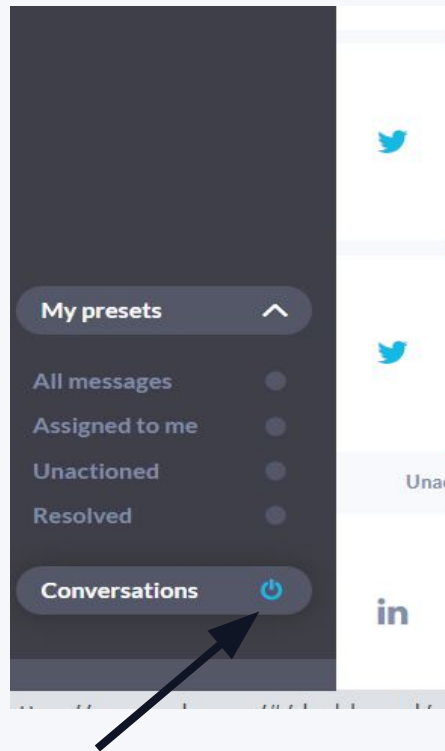
Snippets

Conversations Mode

Conversations mode is great for grouping together all of your conversations, and helping to manage and view the Orlo inbox better.

For our full list of benefits click on our help guide on the link below:

<https://support.orlo.tech/conversations-mode>



To enable conversations mode. The conversations icon shown above must be turned on, with the icon showing as blue.

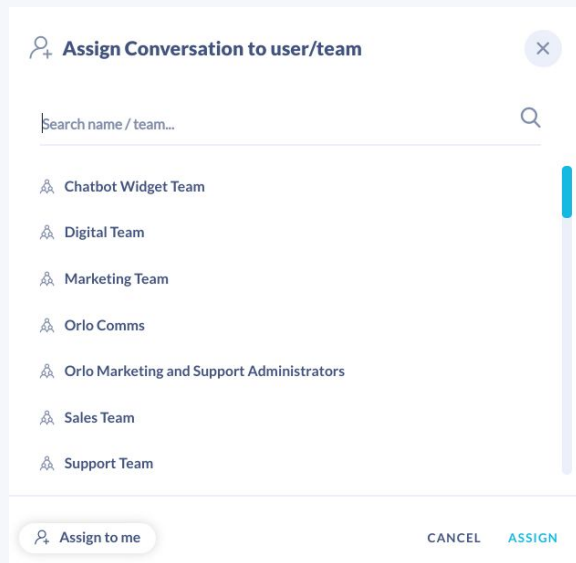
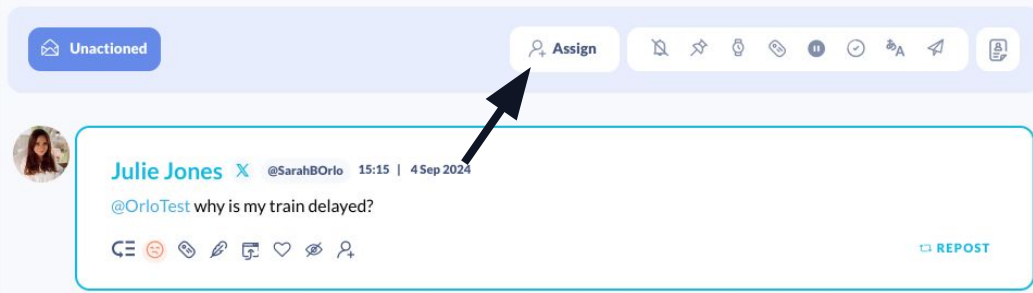
Assigning Messages

When clicking into a message in Orlo agents must either assign a message to themselves, a colleague or a Team if they have the teams functionality enabled in Orlo.

The benefit of assigning messages allows you to start tracking Inbox metrics such as response times within the Inbox report or filtering messages by assignee.

<https://support.orlo.tech/assigning-an-inbox-message>

First click on assign when clicking into a message in the Orlo inbox



Then assign the message either to yourself, your colleagues or a team if this has been set up in your Orlo user settings.



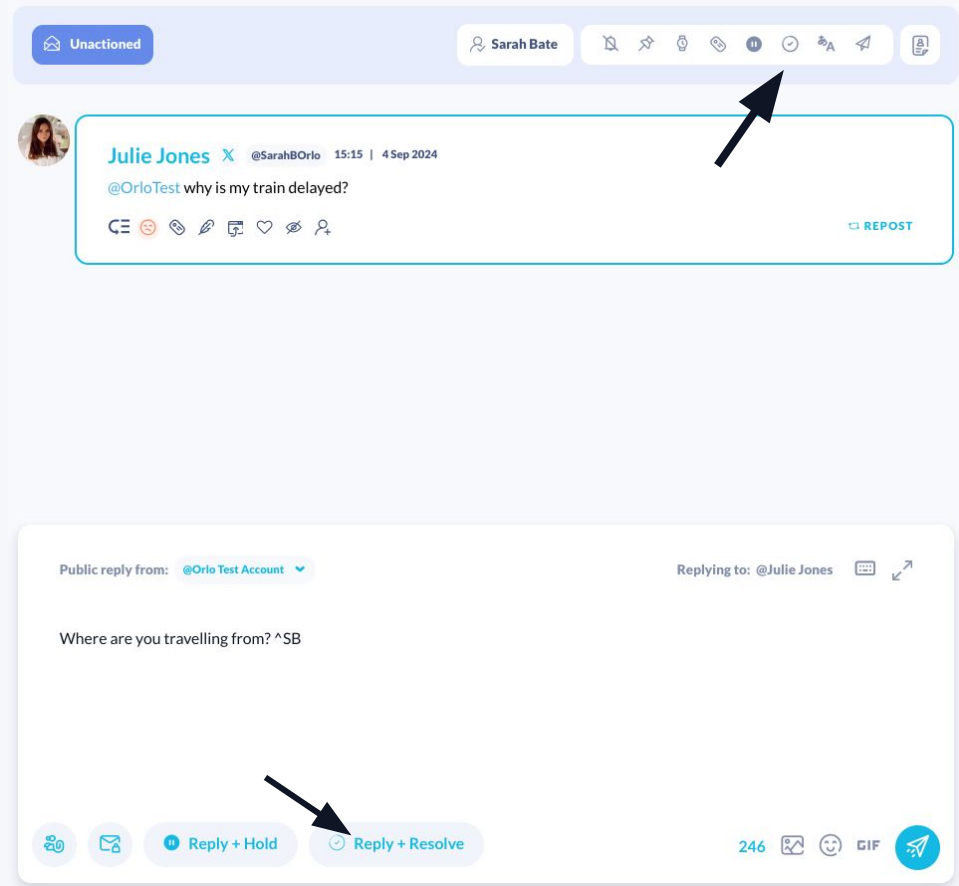
Resolving Conversations

Conversations mode allows agents to resolve messages that have been dealt with to remove them from the Orlo inbox view.

These resolved conversations are then stored in our 'Resolved' preset view.

This helps to clear your Inbox to maintain a streamlined view of your unread and unactioned conversations.

From this you can also report on resolution time within the Inbox Report metrics.



Once you have typed out your reply, you can resolve a conversation by clicking on the resolve button in the message box. If it doesn't need a reply, you can click on the resolve conversation icon located on the top bar.

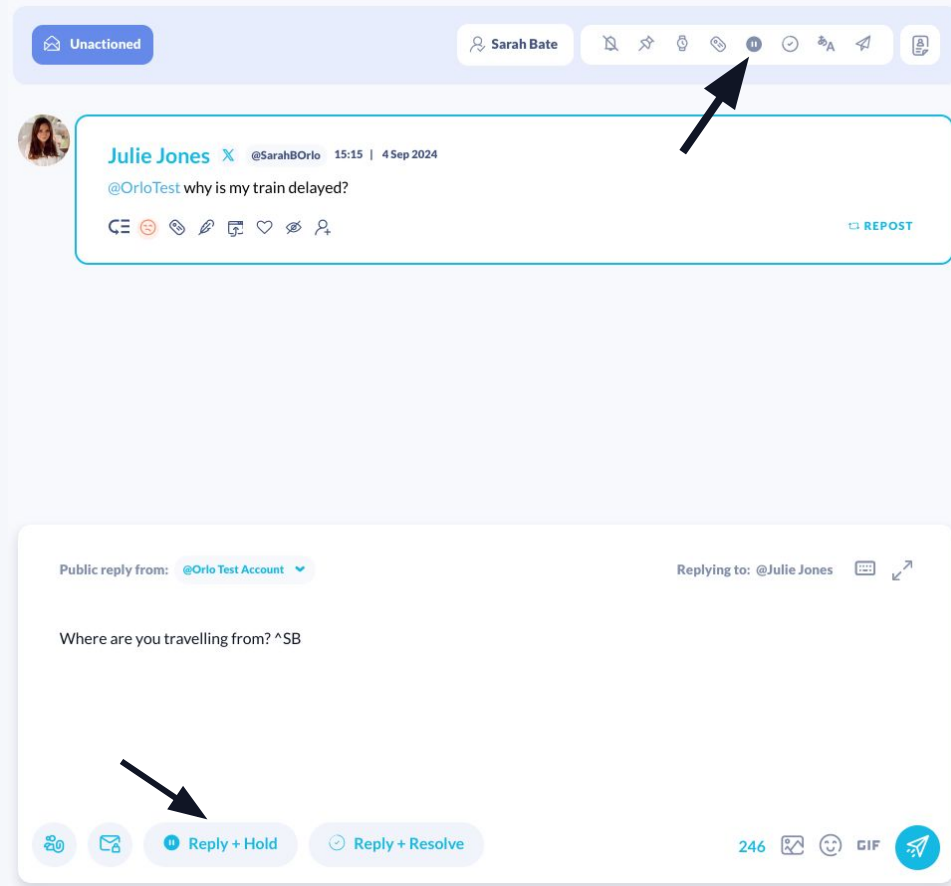


On-Hold Conversations

On hold allows agents to put a conversation on hold if you're waiting on a reply / need to respond later. This stops the clock on your Resolution time. You can select whether the conversation is on hold internally or externally.

On Hold Conversations can be viewed via the Status filter.

This helps to clear your Inbox to maintain a streamlined view of your unread and unactioned conversations without impacting your Resolution time.



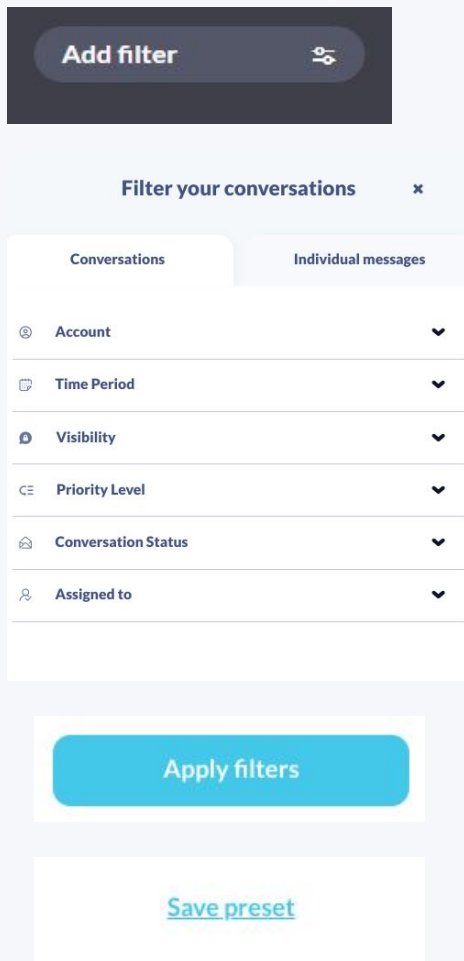
Once you have typed out your reply, you can select 'Reply + Hold'. If it doesn't need a reply, you can manually action the message and select the on hold icon located on the top bar.

Filters and Presets

Filters and Presets are great to personalise the Orlo Inbox and view the messages that you want to see.

Presets differ to filters by allowing agents to save their particular filtered view, and toggle between different Inbox views.

<https://support.orlo.tech/inbox-filters>



The screenshot shows the Orlo Inbox filter interface. At the top, there is a dark grey button labeled 'Add filter' with a filter icon. Below this is a section titled 'Filter your conversations' with a close icon. Underneath, there are two tabs: 'Conversations' (selected) and 'Individual messages'. A list of filter categories follows, each with an icon and a dropdown arrow: 'Account', 'Time Period', 'Visibility', 'Priority Level', 'Conversation Status', and 'Assigned to'. At the bottom, there is a large blue button labeled 'Apply filters' and a smaller button labeled 'Save preset'.

Click on 'Add Filter' on the left hand side of the Inbox.



Select your filters from the Conversations or Individual Messages filters options.



Once you have selected your filter, you have the option to select the save preset option, and name your preset. E.g. Instagram Inbox.



Tagging Messages

Message Tags in the Inbox are great for labelling messages with particular themes.

The benefits of message tagging allows you to see particular message trends in your Inbox. Allowing you to run Inbox reports around message tags to see volume of messages, and response times.

Message Tags can be set up by going to Settings -> Inbox Settings -> Create Message Tag



To Add a message tag, you can select the tag icon as above, click 't' on your keyboard or use the Automation feature to auto-apply the tags to messages with certain criteria e.g. keywords.

Message Notes

Message Notes in Orlo are great for internal communication between colleagues when responding to messages.

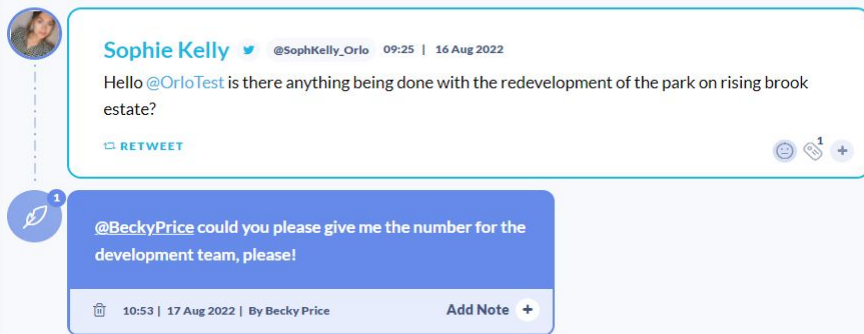
When you @ a colleague an email notification will be triggered to ensure nothing is missed.

This may be an update for a case, or asking a colleague for advice when responding to a message.

<https://support.orlo.tech/addin-g-note>



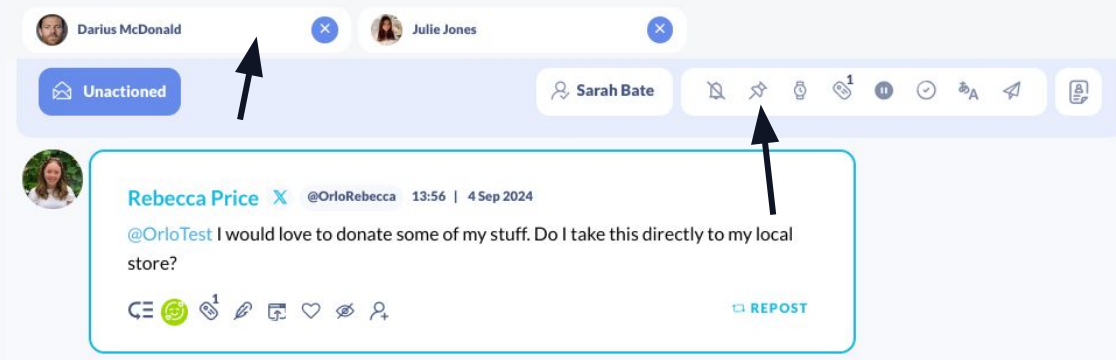
To Add a message note, click on the notes icon. Your note will then appear underneath the message. Notes can automatically be applied to messages with a certain criteria using our Automation feature.



Pinning a Message

In the Orlo inbox, agents are able to pin conversations, which is great for helping agents who are responding to multiple messages at one time.

Pinned messages can be toggled between and unpinned once the message has been dealt with. You are able to pin multiple messages at one time.



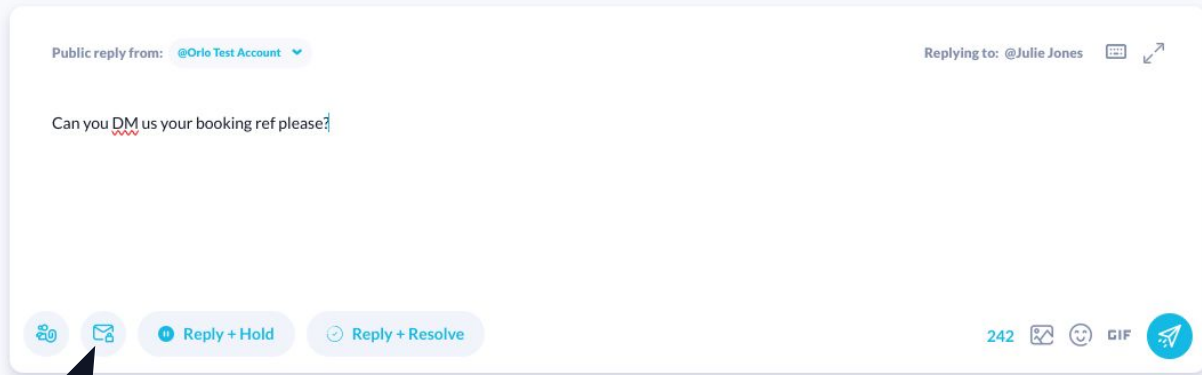
To Pin a message in Orlo, you will need to click on the pin icon which is located on the top bar. This will then pin the message to the top of the screen to toggle between the two messages. Only the person who has created the pinned message will see it and they will stay there until they are removed.

DM Reply Link

The DM reply link button in the Orlo Inbox allows agents to offer the option of opening up a private message to a customer to continue the conversation.

This is great if you need to move a conversation offline where it may cause reputational issues or involve a sensitive topic.

You will not see this link in Orlo, but this will show natively.



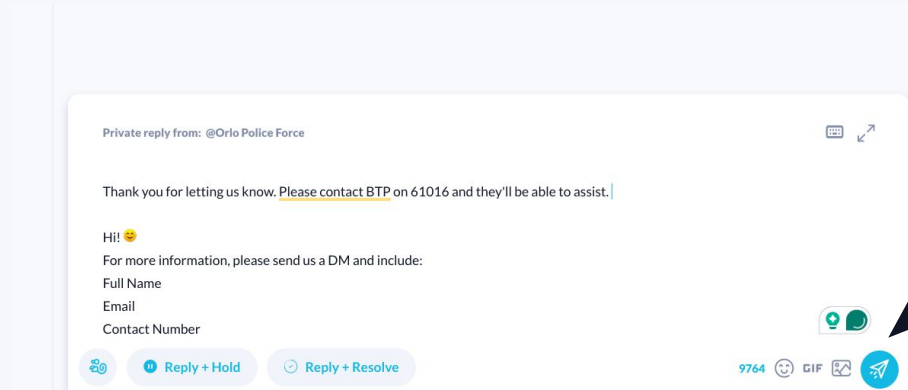
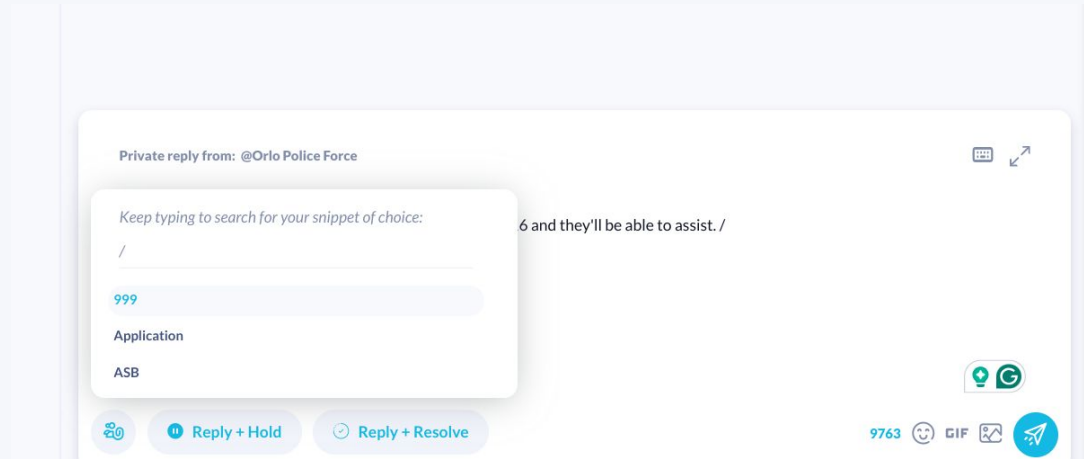
The DM reply link button is located in the message reply box. To add the DM reply link click on this button. The button will change to display 'DM Reply Link Added', and will send a link when replying to a customer

Adding Snippets

Snippets are great for frequently asked questions, saving time from having to write the same reply time and time again.

When agents select the '/' key on their device any saved snippets will be available for agents to use.

Snippets can still be edited in the reply box if needed to add any additional information.



**Agents can then
send messages
out via the reply
button**

