

# Getting started with Front

User guide

# Front User Guide

We're excited to have you on board!  
We'll help you learn how to work with your team in your new shared inbox.

We know getting used to a new tool can take some time, so please [reach out](#) to us if you have questions. We're always happy to help.

**Ready to start working in Front?** This User Guide will help you learn everything you need to know, plus our best tips to help get you up and running quickly.

**Need more help?** Explore our [Community Site](#), where you can read more detailed support articles, watch video tutorials, and ask questions.

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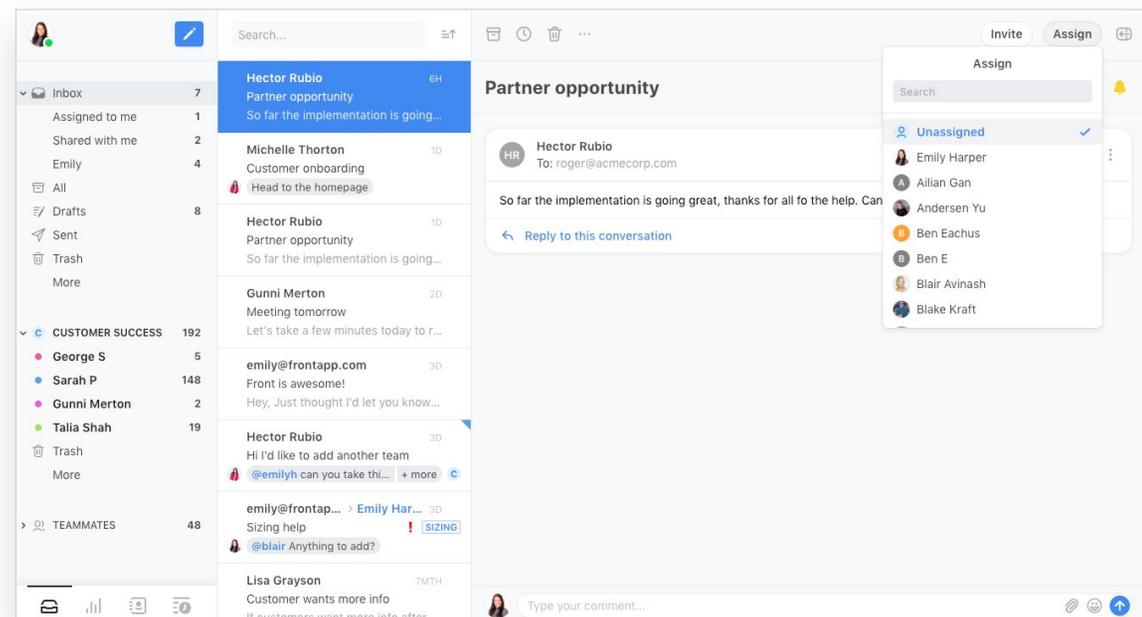
## Front Basics

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## Front 101

### What's Front?

Front is a platform that brings all your work communication in one place. Instead of logging in to Gmail or Outlook to check and respond to your email, you'll log in to Front. If you use customer communications apps for SMS texting, live website chat, social media messaging, or support ticketing, you can manage those in Front too.



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### What can I expect when I start using Front?

Front makes it easy for you and your team to answer all your messages, faster. Here's what you'll find when you're all set up on Front:

- You'll use a shared inbox, so your team will work more collaboratively.
- You can share specific conversations with teammates by @mentioning them on the message, so you don't need to forward or copy them on replies
- Your CRM and other apps can integrate with Front, so you'll have all the information you need to answer messages, right in your inbox.
- You'll spend a lot less time hunting for things buried in your threads, because Front keeps you and your team organized.

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## Quick Start

*Follow the steps below to dive right into Front, or read on to follow the full guide*

Front gives your team a shared inbox for collaborating on all your work communication. We'll walk you through the initial set up process to get you and your team off to a running start.

### Finishing your account set up

1. [Sync your work email](#) to manage it in Front (don't worry — it stays private and separate from your team inbox).
2. [Change your Front settings](#) to fit your working style.
3. [Install the Front desktop and mobile apps](#) to access your inbox from any device.

### Working with your team

4. [Assign messages to the right owners](#), so no one spends time working on the same thing.
5. [@Mention teammates in comments](#), and they can follow along without being copied.

### Boost your productivity

6. Keep your inbox organized by [snoozing messages for later](#) or [tagging](#) related messages
7. Automate tasks you often repeat by creating [rules](#).
8. Set up [canned responses](#) to help you reply faster, or work on [shared drafts](#) to edit responses with your team in real time
9. Get around Front faster with shortcuts, like 'A' for Reply All, 'E' to Archive, and 'M' to Comment — [try them all](#) to see what works best for you.

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## How teams use Front

*A few common workflows we see from our customers*

Front allows all types of teams to collaborate openly without noisy chat rooms, complicated processes, or switching between tools. Here are some example workflows to get your ideas flowing!

**Support:** Respond to customers over multiple communication channels, escalate requests through tags or issue tracker integrations, and increase customer satisfaction with faster replies.

**Sales:** Snooze messages to keep track of follow ups, update opportunities right from your inbox with the Salesforce integration, and @mention engineers behind-the-scenes on technical conversations with prospects.

**Operations:** Respond to SMS and email in one place, assign messages to owners so nothing slips through the cracks, and use rules to automate message routing for more efficient follow up.

**Recruiting:** Coordinate interviews, feedback, and decisions in one conversation with comments and @mentions, and share email drafts with hiring managers to edit them together in real time.

**Engineering:** Get more visibility into customer feedback, collaborate through comments, or build a plugin that makes it easier for teammates to access the important information they need.

# Account preferences

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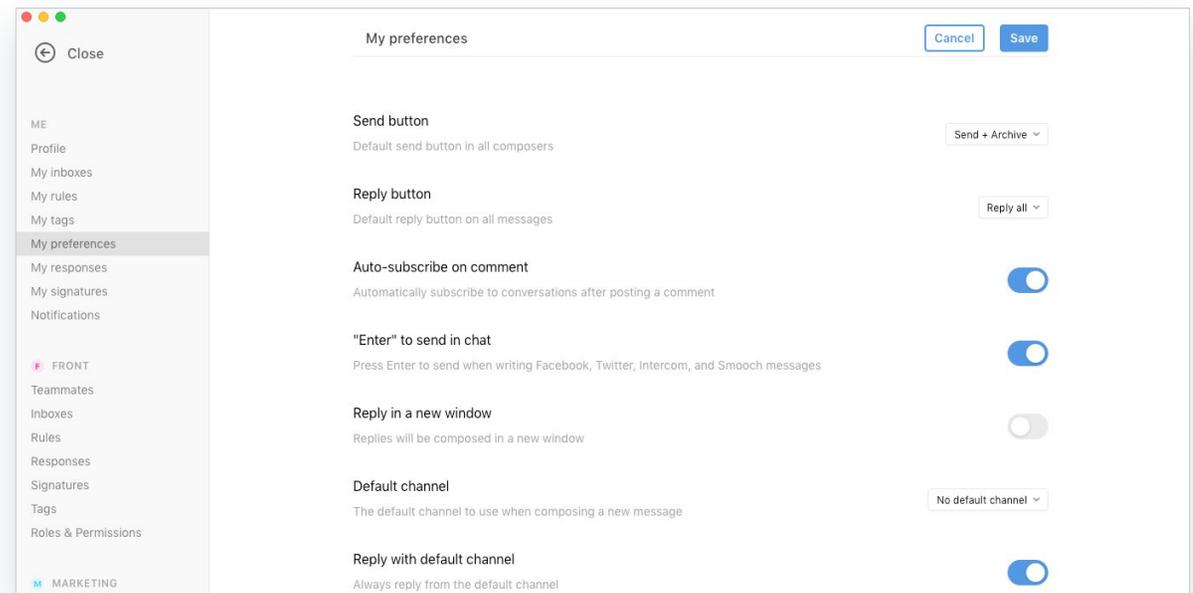
Front Basics

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## Update your settings

*Set preferences that work for you*

You can find your Settings by clicking on your avatar in the upper left corner of Front. From here you can customize your Front workspace to fit how you work.



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### Profile

Change your username, account password, or enable two-factor authentication

**My inboxes:** Connect an email address or other account to sync with Front — it will only be visible to you, not your team

**My rules:** Automate repetitive tasks for your individual inbox, like sending auto-replies or tagging messages based on the sender or keywords

**My tags:** Create or delete private tags (you can tell when you use a private tag by whether it has a lock symbol on it)

### My preferences

Change your Front workflow options — choose the default email address your messages are sent from, make Front your default email client, set your snooze timing options, and more

**My responses:** Create or edit your private canned responses (which only you can use) or set your vacation auto-responder

**My signatures:** Create a signature for every occasion — Front designates the first signature as the default, so make sure the one you usually want to use is at the top

### Notifications

Enable desktop notifications, mobile push notifications, or email notifications for activities you care about, like being mentioned in a comment or receiving a new message



**Tip:** Click on your avatar and then on the green “Available” banner to mute your notifications, like when you’re in an important meeting or out of the office

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## Connect your work email

*Keep your focus by managing everything in one place*

Front works for your individual email, too. Mention teammates on your messages instead of forwarding them or sort your email with rules — just like your team inbox.

Your individual inbox is kept **private** by default.

### HERE'S HOW IT WORKS

- Your emails will sync automatically with Gmail or Outlook, so you don't have to switch between Front and a second inbox
- You can share specific conversations with teammates by @mentioning them on the message, so you don't need to forward or copy them on replies
- You can have a teammate cover your email when you're out sick or on vacation, without needing to share your password

### Set up instructions

- [Gmail accounts](#)
- [Office 365 accounts](#)
- [Other email providers](#)

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## Download the apps

*Work at your desk or on the go — everything stays in sync*

### Installing Front on desktop

1. [Visit this page and download Front's desktop client.](#)
2. Open the downloaded file and double-click the Front logo to begin.
3. Enter your Front account information to log in once you've installed the app. If you don't have an account, ask your Front administrator to invite you.
4. You're done!

### Installing Front on your phone or tablet

1. Download the Front app for your device from the [App Store](#) or [Google Play](#).
2. Open the app and enter your Front account information to log in. If you don't have an account, ask your Front administrator to invite you.
3. You're done!

# Front Basics

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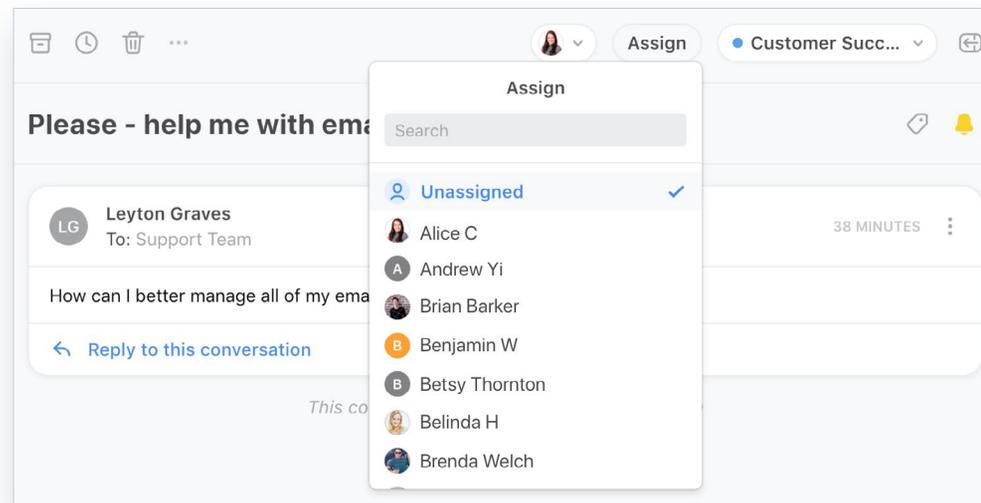
Mastering your team inbox

## Assign and follow messages

*Have ownership across your inboxes and prevent duplicate work*

Ever been a part of a Google Group or distribution list? Usually it means getting bombarded by reply-all emails, but never really being sure that every message has been handled.

That's the problem that [assigning messages](#) solves in Front. With assignments, you know exactly who's working on what and can avoid duplicating efforts on the same message. And if you don't have the bandwidth or context to handle what you've been assigned, just unassign it or reassign it to someone else on your team.



 **Tip:** Front will assign messages to you when you reply to them first by default — but you can [turn that option off](#) if you want! You can always see what's on your plate under **Assigned to me**.

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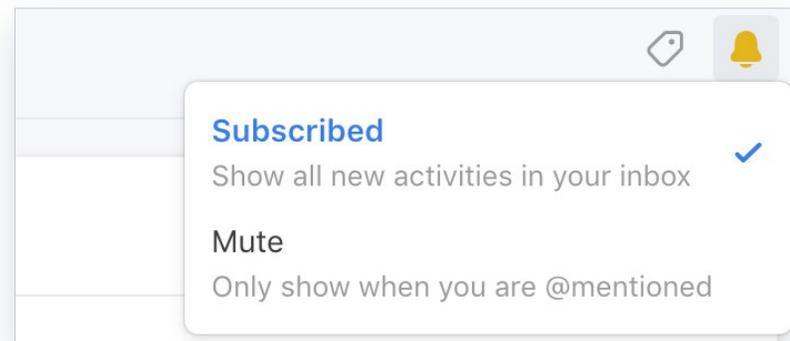
[Assign and subscribe to messages](#)

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You can also [subscribe to](#) conversations to see what's happening without being copied on them. When you comment or are @mentioned on a conversation, you'll automatically be subscribed to the conversation. If you don't want to get notifications about it anymore, you can mute it.



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Assign and follow messages

**Comment with @mentions**

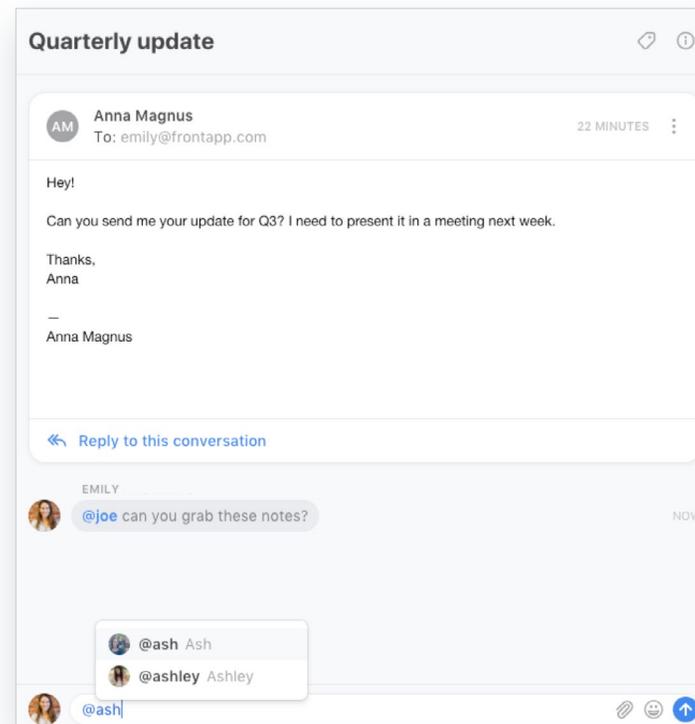
Snooze messages for later

Mastering your team inbox

## Comment with @mentions

*Talk with your teammates behind-the-scenes*

Most of the time, there's a lot more going on internally than what the customer sees. When you need some help from a teammate, you can just @mention them in a comment instead of kicking off a separate thread or pinging them in Slack. The internal discussion is saved right on the message for future reference, so everyone can see what's going on.



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## HERE'S HOW IT WORKS

### Team inbox

You can @mention anyone on your team to have them chime in on the conversation. Once someone is mentioned, they'll follow the conversation automatically and get all the comments after that.



**Tip:** Type '@username' to notify someone on your team, or use '@all' to mention everyone who has access to that inbox

### Individual inbox

The nice thing about having your private inbox in Front is being able to collaborate quickly when you need to. If you want to share a message, just @mention your teammate on it. They'll only get access to that message and can chat with you about it in comments, or even reply to it directly. Don't worry about sharing something by mistake — Front will always prompt you to confirm you want to share the message.



**Tip:** Type '@username' to notify someone on your team, or use '@all' to mention everyone who has access to that inbox

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## Snooze messages for later

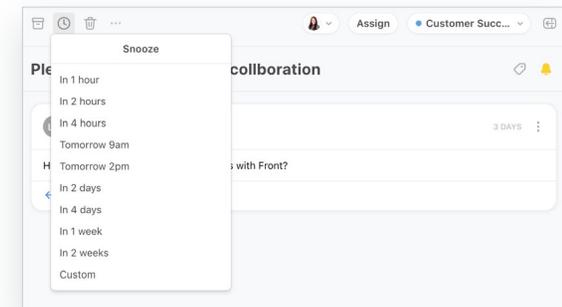
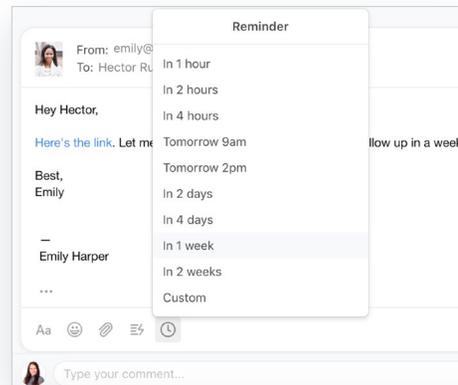
*Keep your inbox clean and never forget to follow up*

### Reminders

A lot of the time, sending that initial message is only 25% of the job. The last 75% is follow up. That's where reminders come in. When you send a message, you can pick a time for it to pop up in your inbox if you haven't heard back.

### Snooze

Snooze works the same way. Just pick a time, and the message will be hidden until then. By snoozing messages until you need them, you can focus on what you need to do now without forgetting to follow up later.



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[Manage your messages](#)

Organize with tags

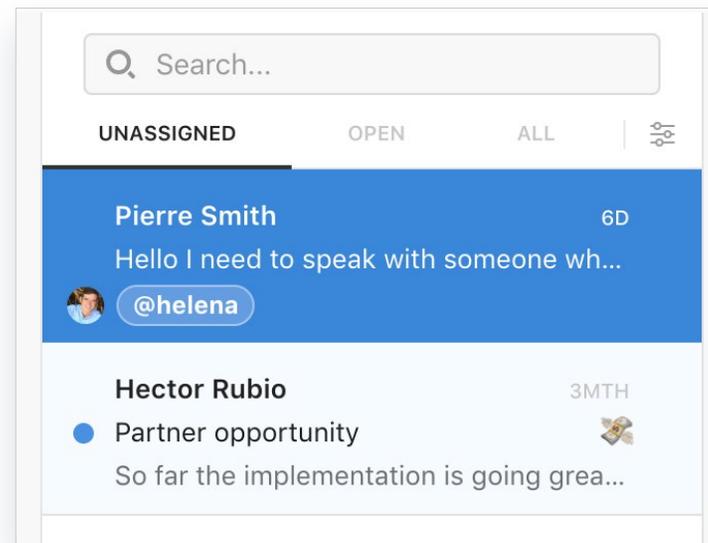
Share canned responses and drafts

Send a mail merge sequence

## Manage your messages

*Stay on top of new messages to get to "inbox zero" as a team*

Front keeps your team inbox from becoming a black hole. You can always see the status of a message in your team inbox to know exactly what's going on.



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## Unassigned

Your new messages! Or messages that were unassigned by a teammate or by rules.

## Open

These are assigned and unassigned messages that haven't been archived yet. You should try to keep as few open messages in your inbox as possible to help your team stay organized.

## Archived

These messages have been handled, but that doesn't always mean they're gone for good. They might be snoozed to re-open at a later time if you don't get a reply. That way, you don't lose track of messages that need follow up, but they don't clutter up your inbox.



**Tip:** Wondering what those numbers in your team inbox mean? [You can choose](#) — they can either be the number of unassigned messages or the number of open ones.

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## Organize with tags

*Label messages to keep them organized or signal a teammate to take action*

Front has two kinds of conversation tags: private and public. Private tags are only visible to you, and public tags are shared with your team so anyone can use them.

 [Read more on our Community Site](#)

### Creating a tag

Click the **+Tag** button at the top of any message, and you'll have the option to pick a tag to use or create a new one. Be sure to specify whether it's private or shared with your team.

#### Create tag

Name

 Sales ▼

Highlight

View in conversation list

■ ■ ■ ■ | ■

■ ■ ■ ■



**Tip:** If you pick a color or emoji for the tag, the tag will be shown in your conversation list. Otherwise, you'll only see it if it's been applied when you open the conversation.

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## Creating a tag

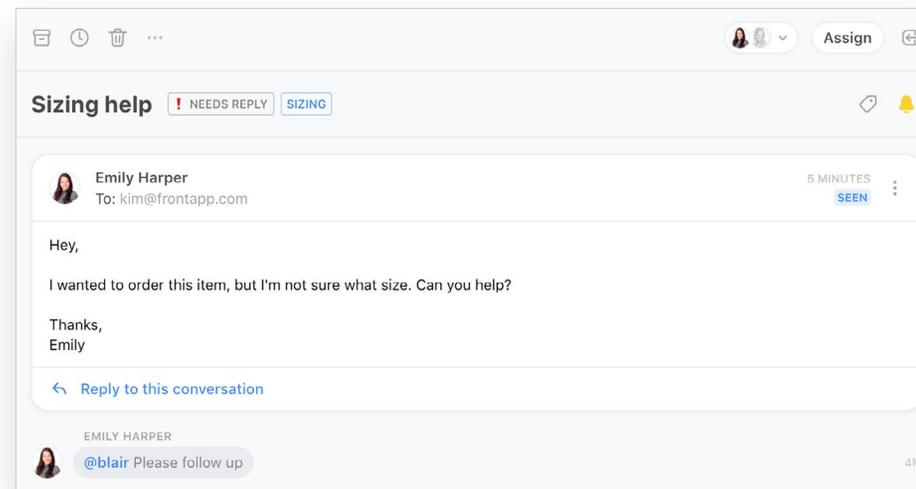
Click the +Tag button at the top of any message, and you'll have the option to pick a tag to use or create a new one. Be sure to specify whether it's private or shared with your team.

## Managing tags

You can edit or delete tags in your Settings under My tags (for private tags) or Tags (for public tags). You can also pick whether public tags are available for all team inboxes or only specific ones.

## Using tags

Click the +Tag button to label your message — you can use [rules](#) to tag messages automatically or trigger other actions, or you can run [analytics reports](#) to see how frequently certain tags are being used.



 **Tip:** Click **More** in your individual workspace to [pin your frequently used tags](#) to get those messages even faster, like messages tagged “Urgent” or “Needs Follow Up”

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## Share canned responses and drafts

*Re-use your best messages or get a second pair of eyes on your draft*

Ever felt like you're writing the same email over and over again? Save it as a canned response. You can save them as individual responses that are private for you, or share canned responses with your team for consistent replies to customer questions.



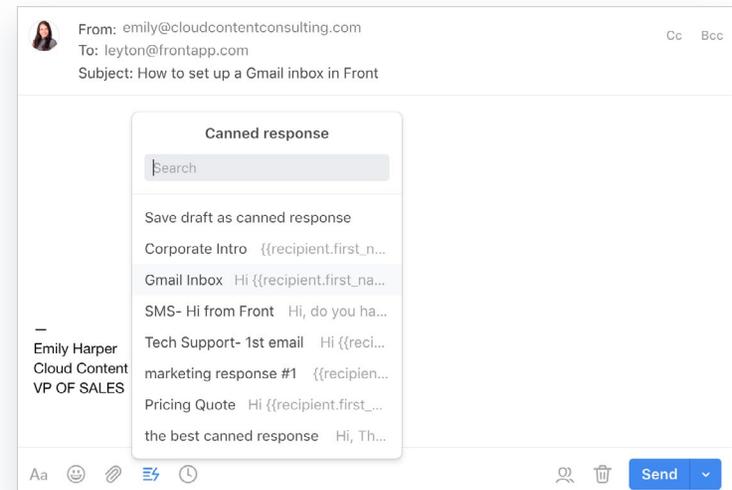
**Tip:** Insert **dynamic variables** in your canned responses (type {{ to pull up the full list). It's an easy way to balance being efficient while keeping things feeling personal.

### HERE'S HOW IT WORKS

1. Create individual or team canned responses in Settings — you can edit them here later
2. Click the tape recorder icon in your composer window to insert a canned response
3. You can also save new canned responses directly from your composer



**Tip:** Organization matters — your list of responses gets long quickly! Try saving team responses with a prefix of who's using it, like 'Support - xyz' or 'Sales - abc'.



[Read more on our Community Site](#)

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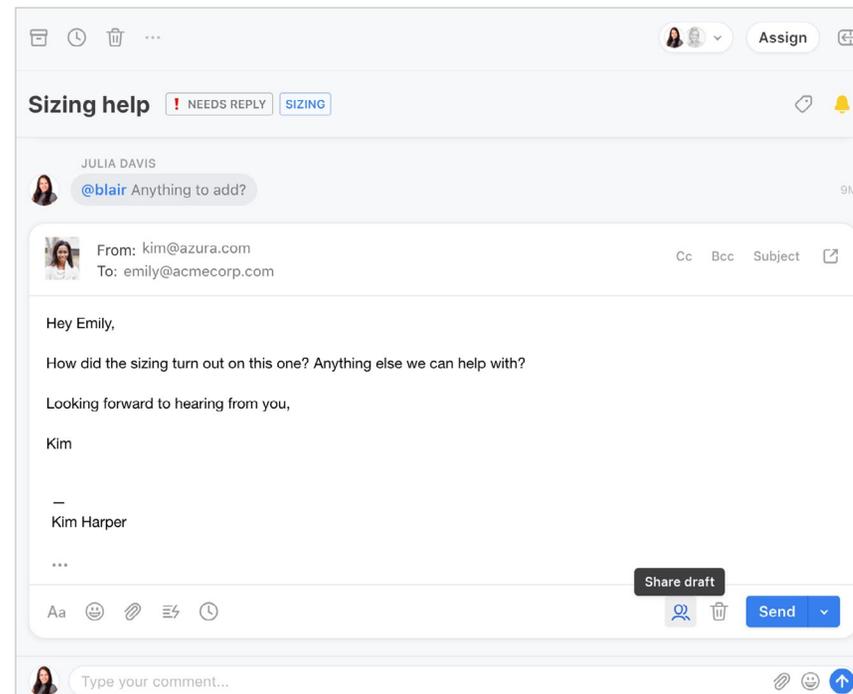
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When you need some help on a message, you can **share and edit a draft** with your teammates — just like a Google Doc. Click the person icon next to the Send button to share your draft.



 **Tip:** Shared drafts can only be edited by one teammate at a time to prevent conflicts! Front will prompt you to “take over” the draft so there’s no confusion about who’s editing.

 [Read more on our Community Site](#)

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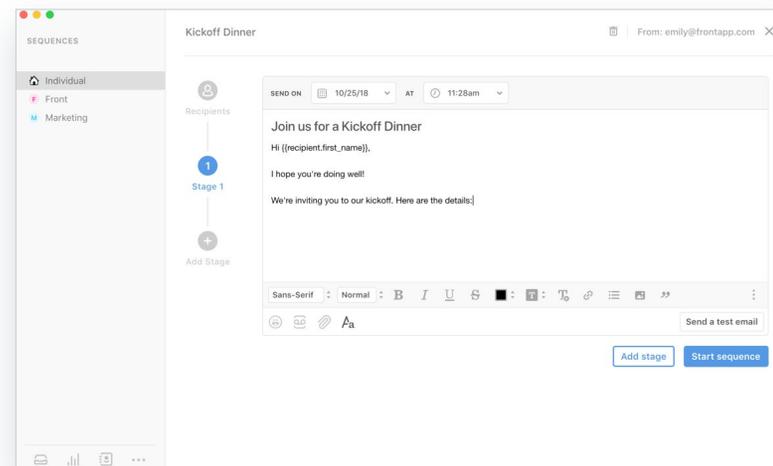
Share canned responses and drafts

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## Send a mail merge sequence

*Put your email blasts on auto-pilot*

If you send messages to specific groups, like a newsletter to your book of accounts or a weekly update to your team, **sequences** might help. Once you pick your recipients and craft your email, Front will automatically do the mail merge to send each one a personalized message.



 **Tip:** You can make custom campaigns with multi-stage sequence. Just click **Add Stage** to set a follow up email to send a certain number of days after the first message.

 [Read more on our Community Site](#)