WITH A MANDA RICHARDS FRIDAY NOVEMBER 20, 2020

Daily Bite Size Training

Topic: Actions in Contacts

Different Categories in Contacts



Actions in Contacts

Make changes in contact information for any updates. You can change field values quickly & click update.



						000	Add New	
	- 🔆 - 8 Inactive Clients •	(L 114 Pros	oects 😐	Company 2 Others •	Leads •		57	
e 🔵 inactive 🕘 Prospec	t Others Leads					 Search Con 	tact	
me ¢	First Name Ø	Middle Name ©	Last Name #	Email ¢	Mobile \$	Togs \$	Action	
Zoom ★ ★ ★				no-reply@zoom.us 👛		Edit Add Note	1	
Alex Doe	Alex		Doe	filzaginsuredmine.com	• (999) 999-3336 •	Send Emoil Send Text Add Activity	а.	
Emily Butler 🗙 🕿 🚖	Emily		Butler	Cick to est	 (558) 689-4423 	Merge Contact Assign Single Drip Add Deal Add Policy	э.	
Lucas Black	Lucos		Black			Add Tosk Delete	а.	
Junita ★☆★				demo@insuredmine.com	 (339) 223-8902 			
sally wong					- (160) 616 1001 -			

	Tags ≑	Action	
	Edit Add Note		
0	Send Email Send Text Add Activity	I	
b	Merge Contact Assign Single Drip Add Deal Add Policy	I	
	Add Task Delete		

Merge Contacts

- 1. Go to Contacts from the left
 - navigation bar
- 2. Select the contact you want to merge
- 3.go to the right end and click on the 3
 - dots
- 4. Select Merge Contact and another
 - page will pop up





Contacts > Merge Contact

O Select this contact as Master



Contacts 360

- 1. Overview
- 2. Documents
- 3. Events
- 4. Card History
- 5. Campaigns
- 6. Other Details
- 7. Chat History
- 8. Intake Form
- 9. Client Pulse
- 10. Phone Logs

Outact 360 Image: Contact 360 Image: Co



Contacts > Contact 360 Aditya Kumar Overview Policy Documents 🖂 Send Email 🖹 Take Note 👸 Events Card History Past 🚯 Campaigns E Other Details All 📵 Chat History Notes 🕑 Intake Form Email 🗊 Client Pulse Files Profile Logs Activities SMS Tasks Calls

THANK YOU!

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