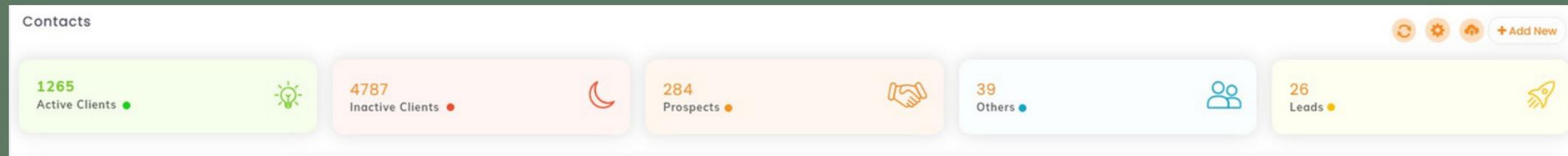


WITH AMANDA RICHARDS  
FRIDAY NOVEMBER 20, 2020

# Daily Bite Size Training

Topic:  
Actions in Contacts

# Different Categories in Contacts



Active Clients - Contacts with active policies (current customers)

Inactive Clients - Contacts with no active policies but had policies in the past

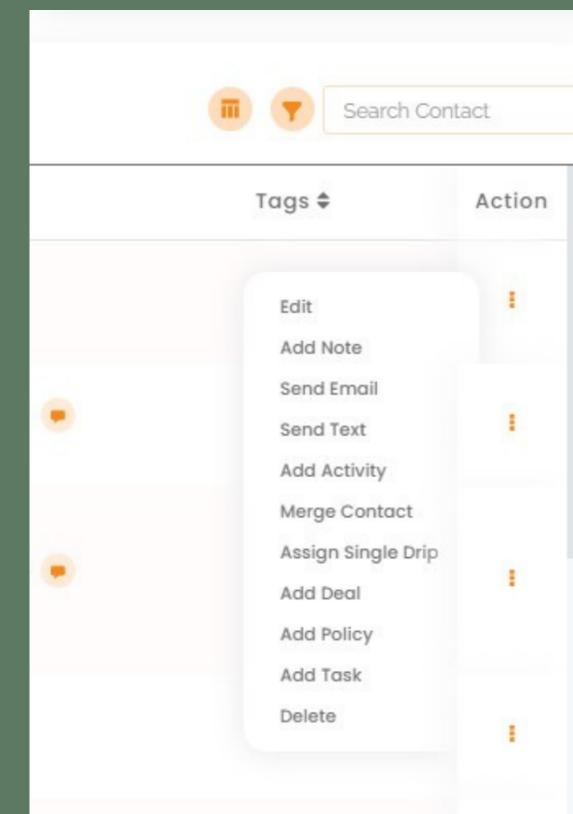
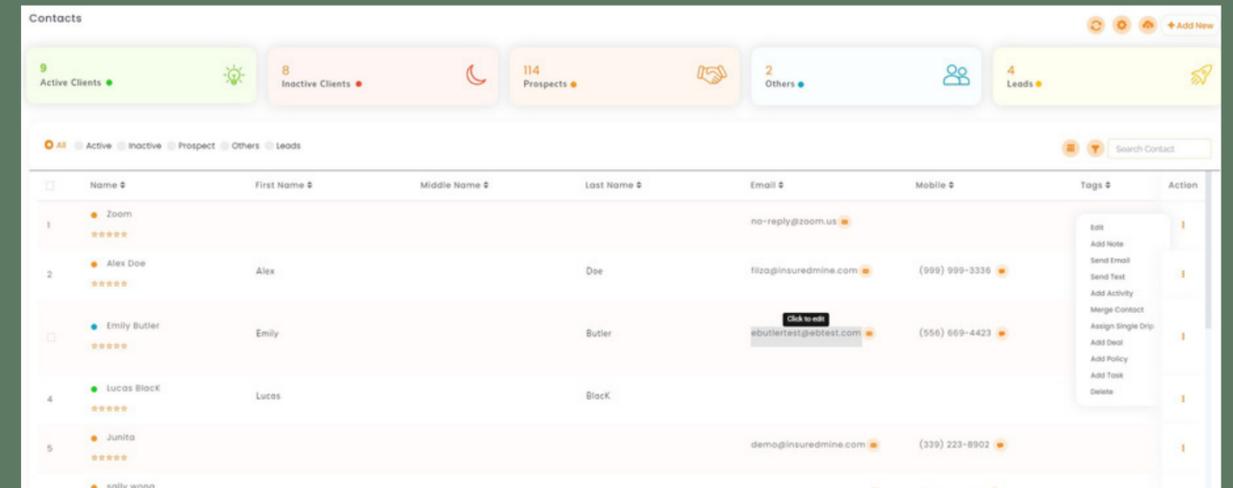
Prospects - Contacts interested in products (policies) and services you offer

Leads - Contacts who are your target clients but have not shown any interest so far in products (policies) and services you offer

Others - Contacts who are not target clients

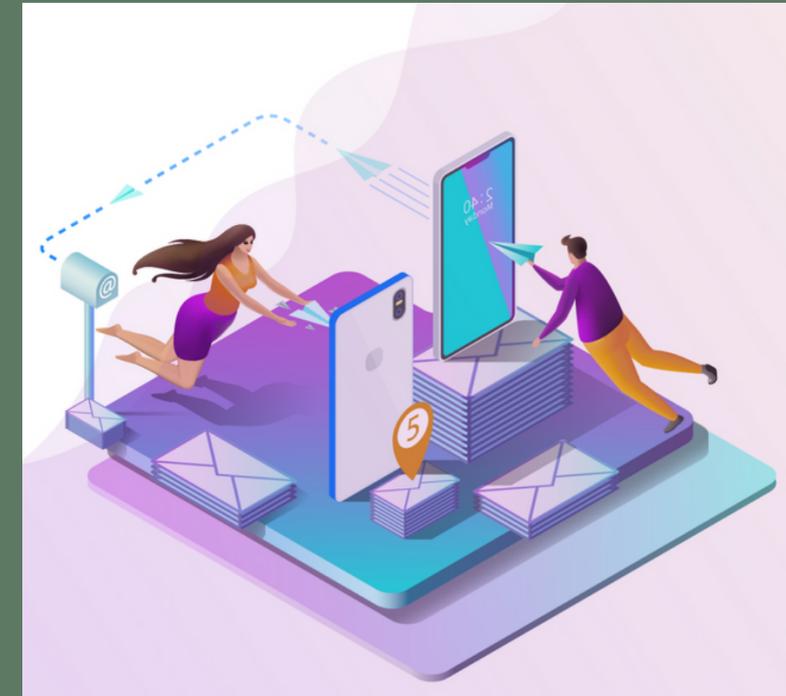
# Actions in Contacts

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



# 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

Select this contact as Master

aditya kumar

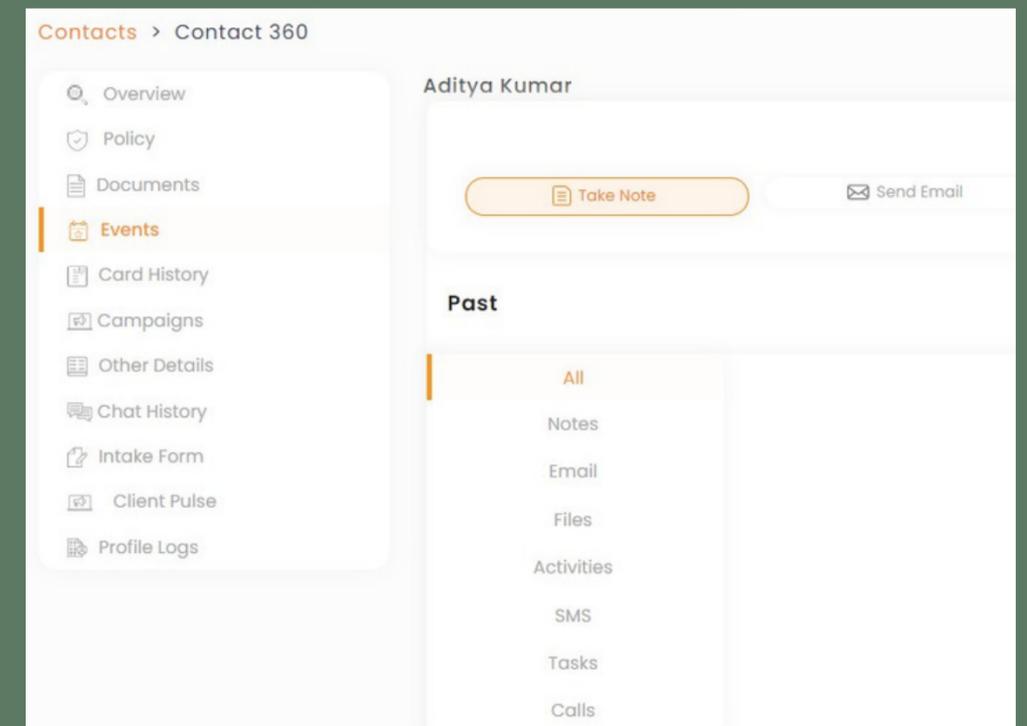
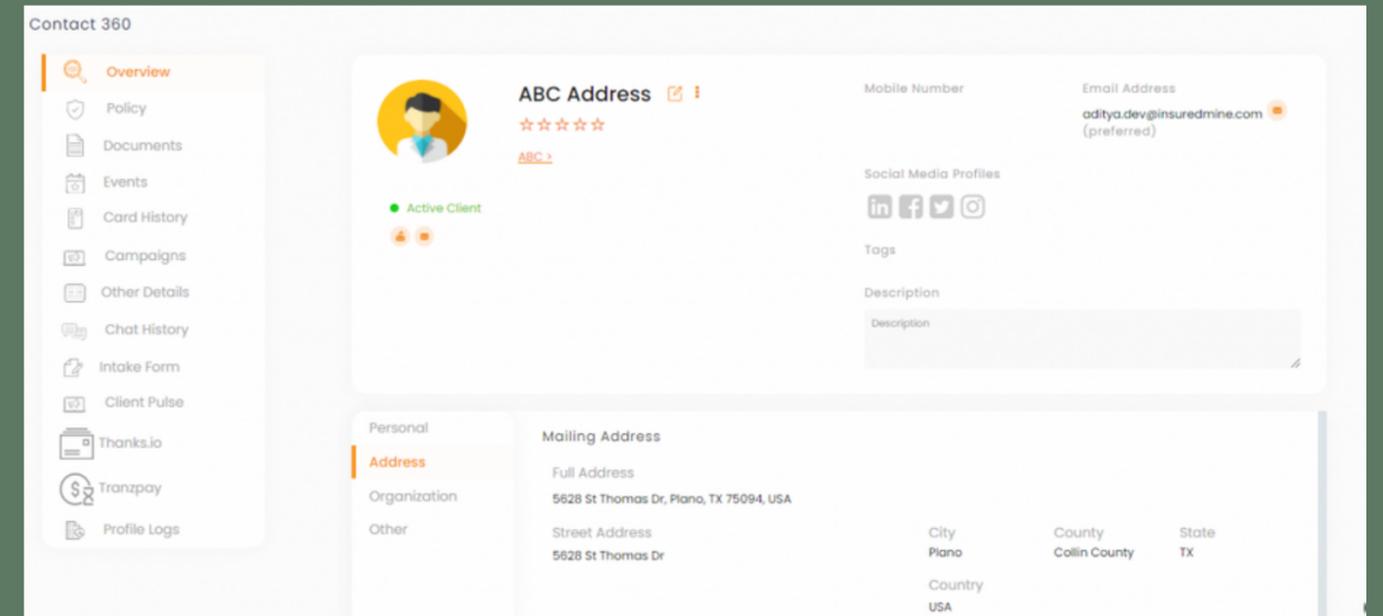
Select all fields in this section

Income: \$5,000.00

ad|

# 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



# THANK YOU!

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