

WITH AMANDA RICHARDS
TUESDAY NOVEMBER 3, 2020

Daily Bite Size Training

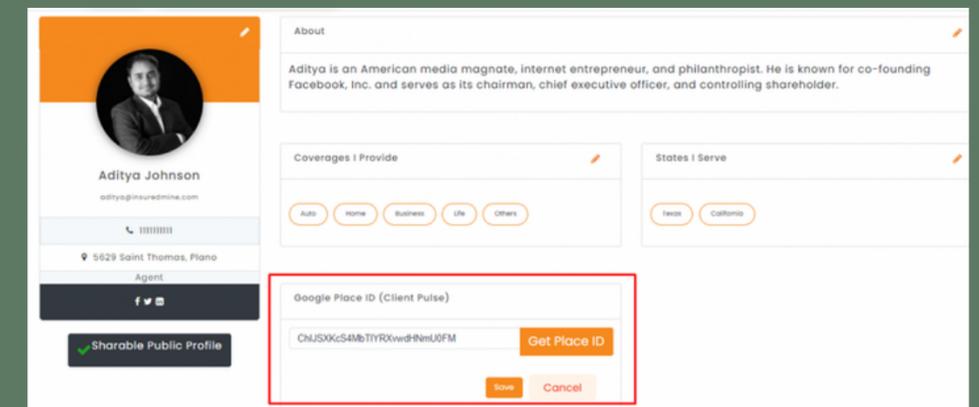
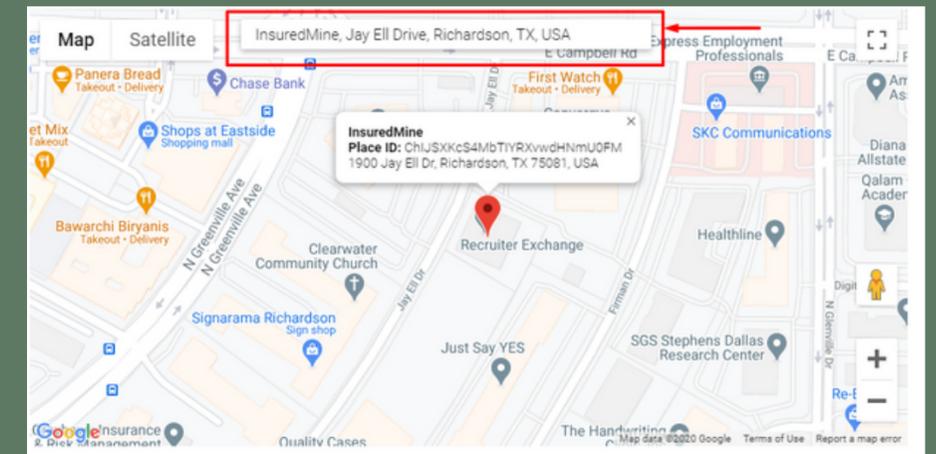
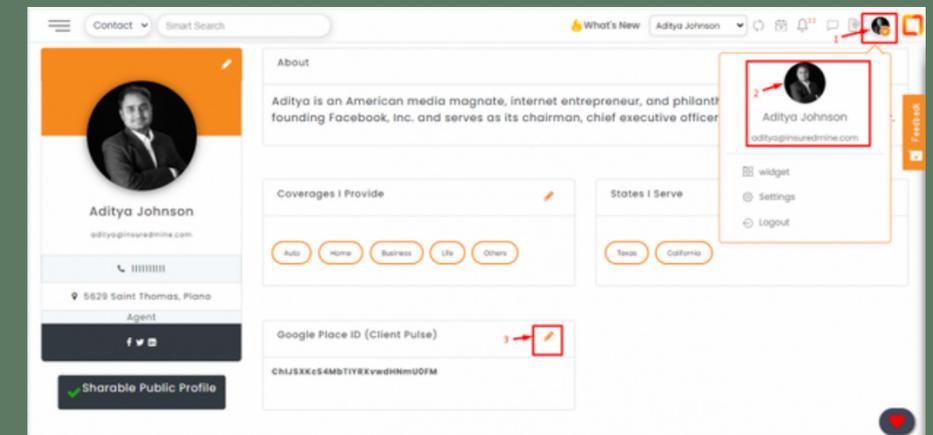
Topic:
Google Reviews
Client Pulse

GOOGLE PLACE ID

How to set up Google Place ID?

1. Make sure Google My Business page is set up
2. Log into your profile
3. Click on your profile picture
4. Click the edit button next to Google Place ID (Client Pulse)
5. If Google place ID Link is blank then click on the Get Place ID
6. and enter your office location

Click here to learn more:
[Google Place ID](#)



CLIENT PULSE AUTOMATION

How to create Client Pulse Automation?

1. Navigate to Engagement
2. Click Create under Automation
3. Select Get Started right of Client Pulse
4. Name the Workflow
5. **Select the mode(s) to send the workflow**
 - a. Email
 - b. Text
 - c. Task
 - d. Reminder
6. Decide after how many days the Client Pulse email will go out

This is not when you will be notified. You will be notified 3 days prior.

The screenshot shows the 'Client Pulse' workflow configuration page. At the top, it says 'Grow your business with more reviews'. The 'Workflow Name' field is filled with 'Client Pulse'. Under 'Select the mode to send the workflow?', the 'Email' option is selected. The 'Select a list' dropdown is set to 'Active Client', with a note that 'Total recipients till now: 2610'. The trigger is set to 'when' followed by 'After' and 'days' set to '20'. A note at the bottom states: 'Note: Automation email/messages for Client Pulse workflow automation will be triggered 20 days after for the "Active Client" list. 3 days before, Agent will get users list notification email.'

The screenshot shows the 'Stage 1' configuration for the workflow. A red box highlights the 'EMAIL' mode selection. The configuration includes: 'Send' set to 'After 4 Days 10:00am', 'From Email' set to 'Agent's Email', 'Template' set to 'Select Template', 'Subject' set to 'How did we do?', and 'Signature' set to 'Select a Signature'. There are also checkboxes for 'Skip Weekend' and 'Add Unsubscribe Link'. The email content area shows a rich text editor with the subject 'How did we do?' and a 'log' button.

HOW TO CREATE AUTOMATION?

1. Fill out what time it'll send
 - a. Skip weekend feature
2. Select From Email
3. Select Template (optional)
4. Fill out Subject Line
5. Select Signature (optional)
6. To Preview click Send to myself
7. Select Any Tags

The screenshot shows a configuration interface for an email automation. At the top left, it says "Stage 1". In the top right, there is an orange "EMAIL" button and a refresh icon. Below this, there are several fields and options:

- Send***: A dropdown menu with "After", "4", "Days", and "10:00am".
- From Email***: A dropdown menu with "saloni@insuredmine.com Saloni".
- Template**: A dropdown menu with "Select Template".
- Send To Myself**: A button with a checkbox for "Add Unsubscribe Link".
- Subject***: A text input field with "How did we do?".
- Signature**: A dropdown menu with "Select a Signature".
- Skip Weekend**: A checkbox.

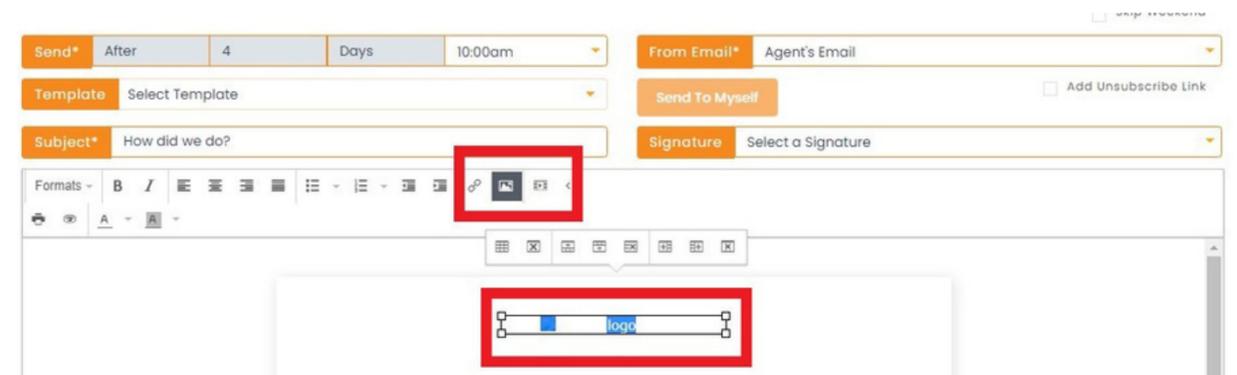
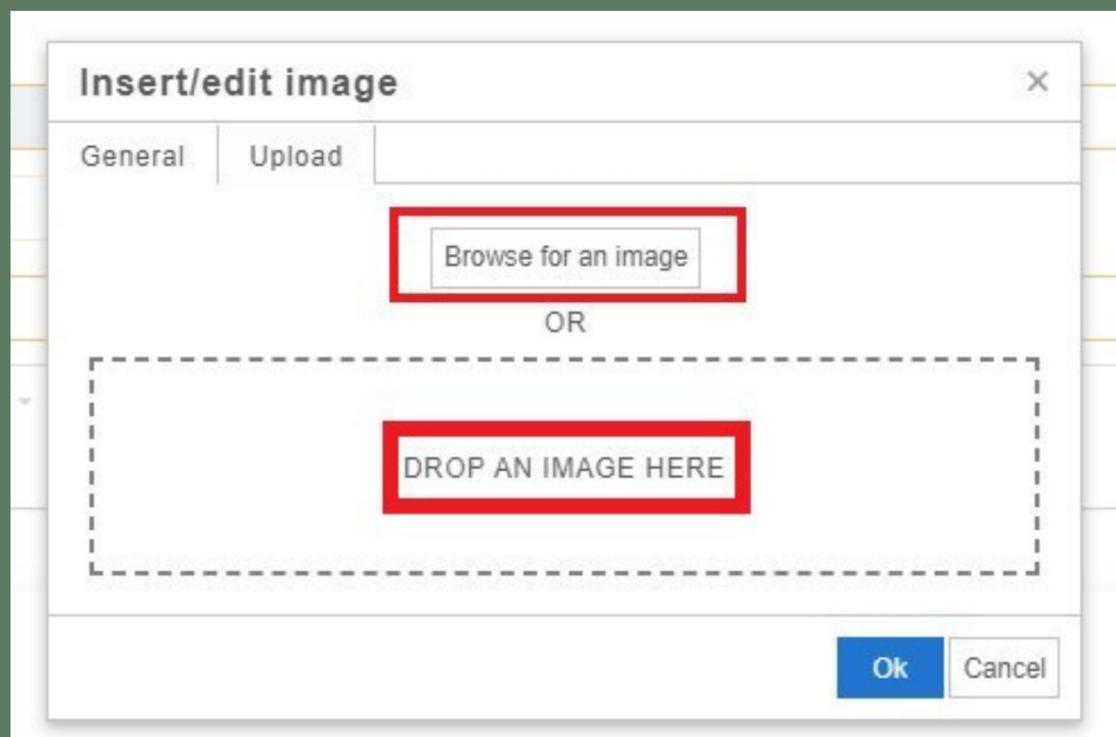
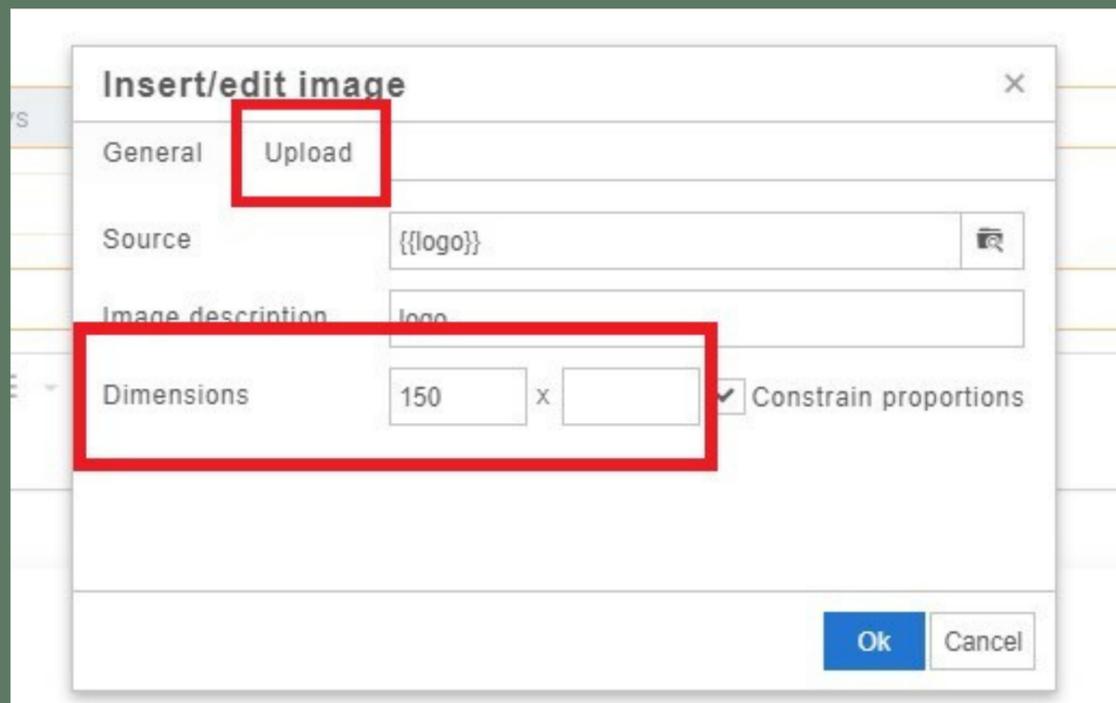
At the bottom, there is a rich text editor toolbar with options for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, image, and video. Below the toolbar is a text input area.

FILL OUT
NECESSARY
FIELDS

**INSERT YOUR
LOGO & LINK**

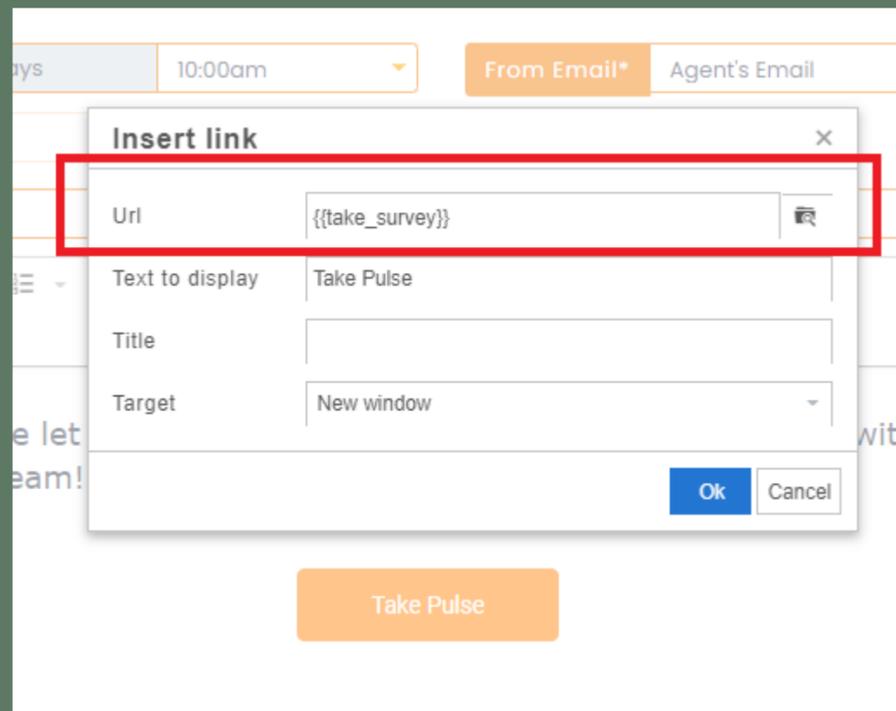
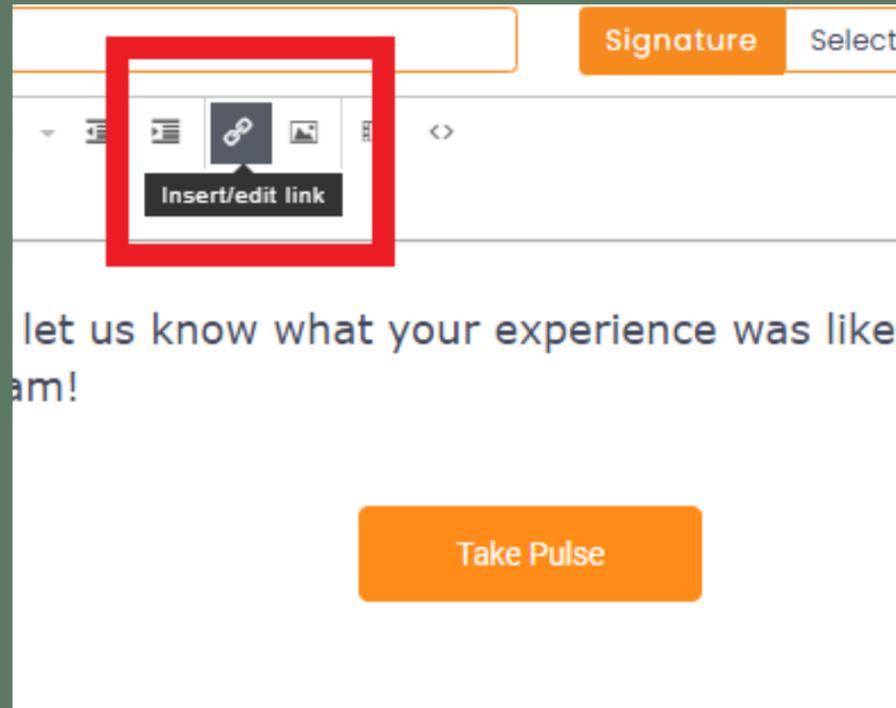
Insert Your Logo

1. Navigate to the body of the message
2. Click the logo so it is selected
3. Hover over the small box that says Insert/Edit Image
4. A popup window will appear
5. Click Upload and select Browse for an Image here or DROP AN IMAGE HERE
6. Change the size accordingly in the Dimensions field
7. Click ok and your logo will appear
8. Adjust logo size accordingly



Insert Your Link

1. Navigate to the body of the message
2. Hover over the button that says Insert/edit link
3. Click the small box that says Insert/Edit link
4. A popup window will appear
5. Paste your link into the field: Url
6. Optional - change the Text to display to change the name on the button



THANK YOU!

To learn more please visit:

[Knowledge base](#)

Email: support@insuredmine.com

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