#### WITH A MANDA RICHARDS WEDNESDAY NOVEMBER 4, 2020

# Daily Bite Size Training

Topic: Notifications

#### How to set/change Subscribe Notification settings:

- 1. In the Pipeline Manager module navigate to the gear settings icon
- 2. Click Settings
- 3. Select Notifications Settings
- 4. Select from the drop-down menu which agents you want to receive notifications for each board.

#### If an agent is not subscribed but mentioned they will still receive a notification



Set default Pipeline and Stage for Webforms Coal Setting Notification Settings Lost Deal Reasons Service Board Pipeline Leaderboard Round Robin	Won Deal Announcement	am.	~
	Subscribe Notifications		
	Pipeline	Agents	
Retention Pipeline	Commercial Ins	× Jake Williams × Jeff Stewart ×	
	Dealboard	Gina Williams	
		John Doe	
		Mark Jones	
	kenewal - Training	× Gina Williams × 👻	

### Subscribe Notifications

Can only be done at Admin level

These setting are available under Pipeline Manager settings, not general settings

Subscribed agents will receive an email notification for the pipeline activities they are assigned to

## MENTION NOTIFICATIONS



#### @ Mentions - Agents

- Can be done at both Admin and Agent level
- Regardless if the agent is assigned to deal card they can still receive notifications when 'Mentioned'
- The mentioned agent(s) will get a notification about the comment



## How to Mention an Agent:

- 1. In the Pipeline Manager module navigate to Quick actions
- 2. Click on Notes
- 3. Type the @ symbol and begin typing the agent's name
- 4. The agent mentioned will receive an email

## THANK YOU!

To learn more please visit: <u>Knowledge base</u> Email: support@insuredmine.com CALL: +14696161821

