

WITH AMANDA RICHARDS  
WEDNESDAY NOVEMBER 4, 2020

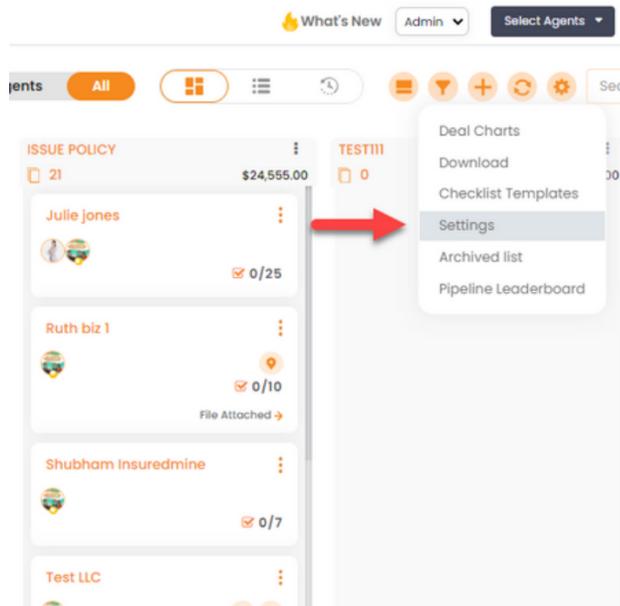
# Daily Bite Size Training

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*

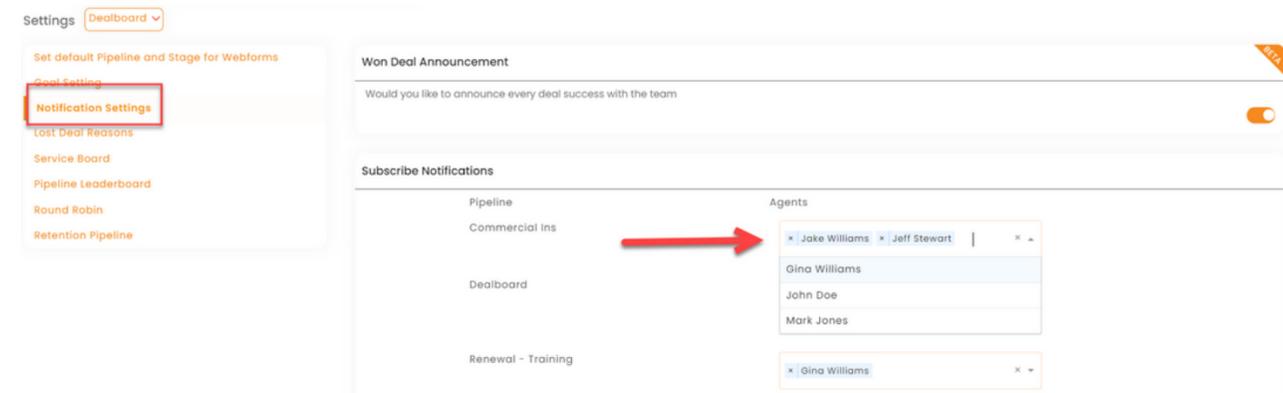


# Subscribe Notifications

Can only be done at **Admin** level

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

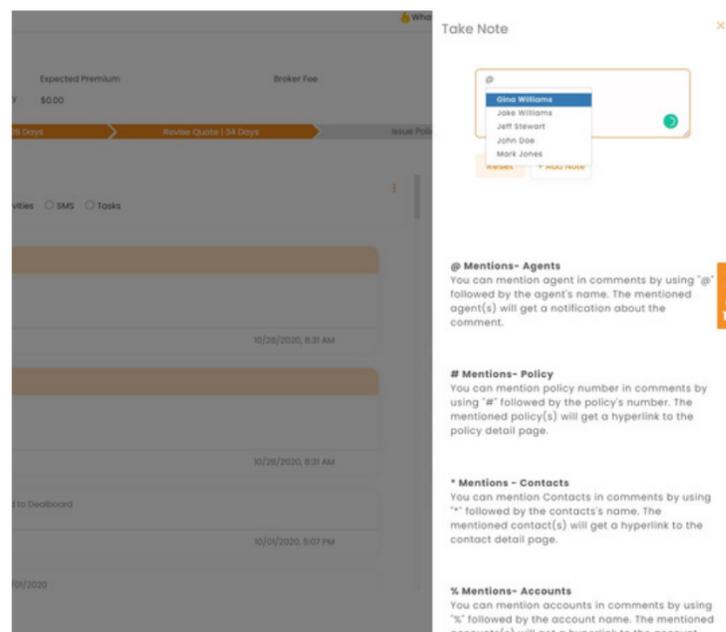
Subscribed agents will receive an email notification for the pipeline activities they are assigned to



# 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:

[Knowledge base](#)

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