

WITH AMANDA RICHARDS
FRIDAY OCTOBER 23, 2020

Daily Bite Size Training

Topic:
10 Most Common FAQ Answered!

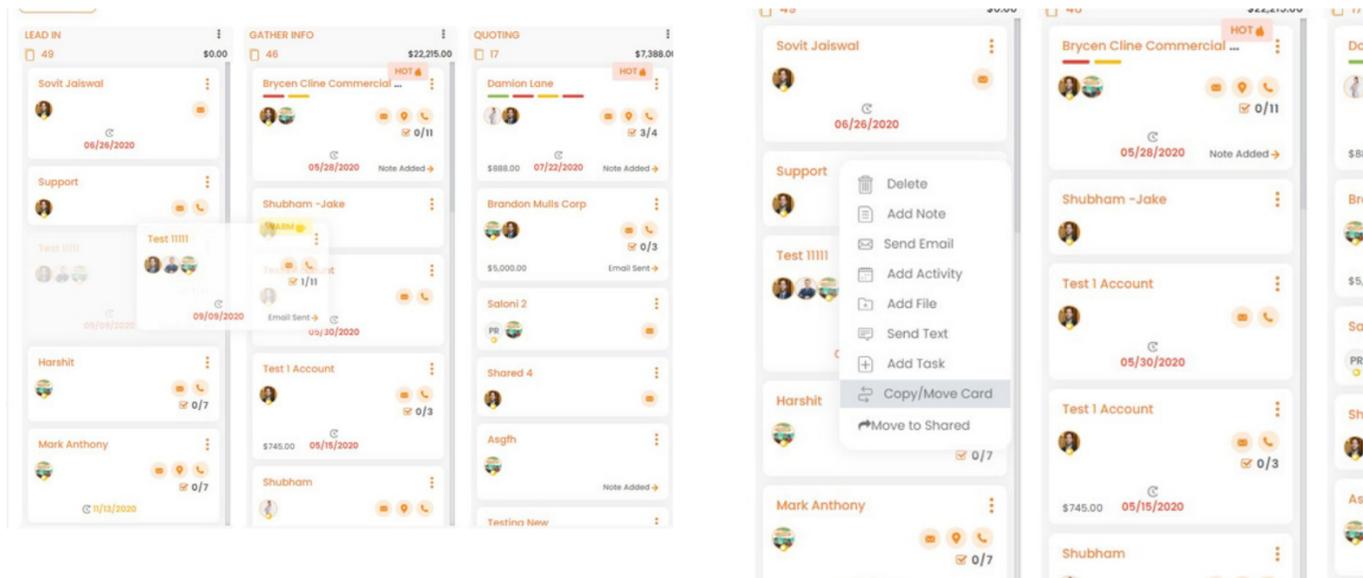
1. How to move from one board to another?

There are 2 ways:

- You can click on the card and drag/drop it to the desired pipeline

or

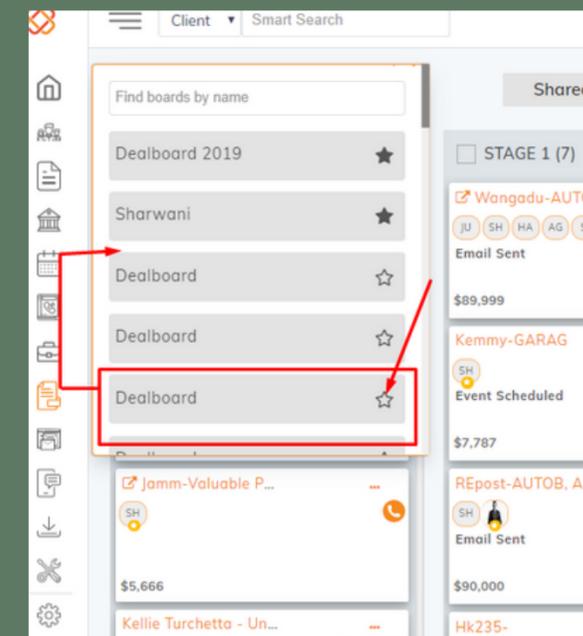
- Click the 3 dots and select Move/Copy



2. In Pipeline Manager what is the star sign near the board names?

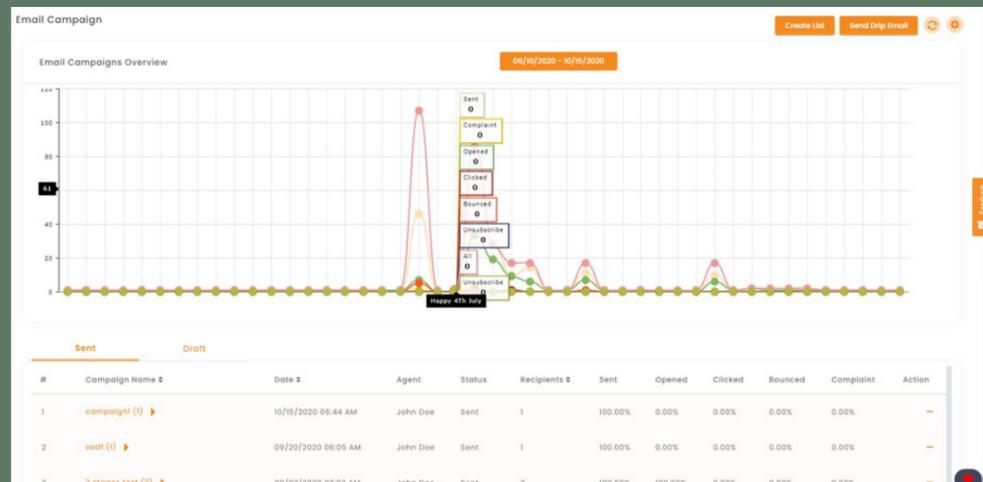
The star is your priority boards

The board will appear at the top of your list like favorites



3. Where do I view all the campaigns I have sent?

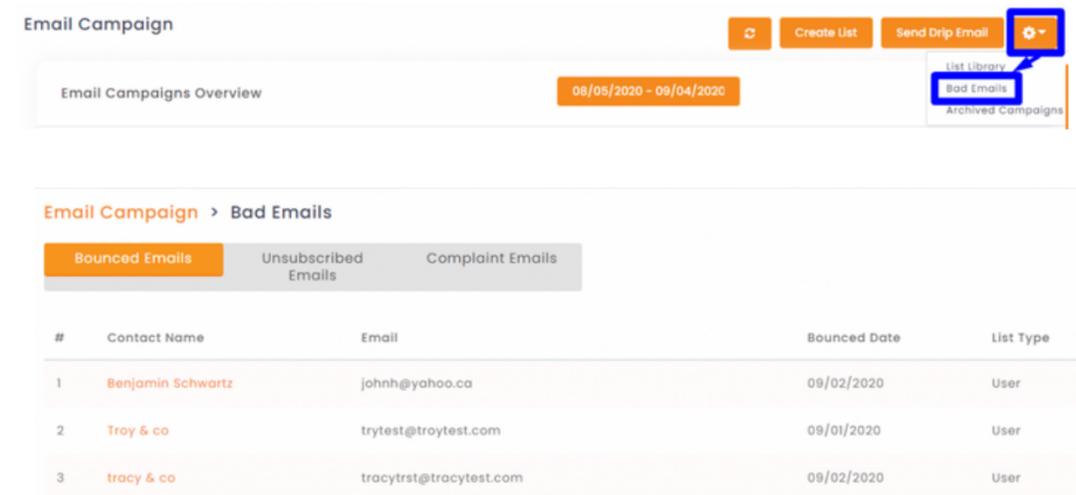
- 1. Go to Engagement
- 2. Click Email Campaign Analytics
- 3. Under the sent section, you can view all the campaigns you have sent



4. How to view bad email analytics?

Bad emails undermine your marketing efforts

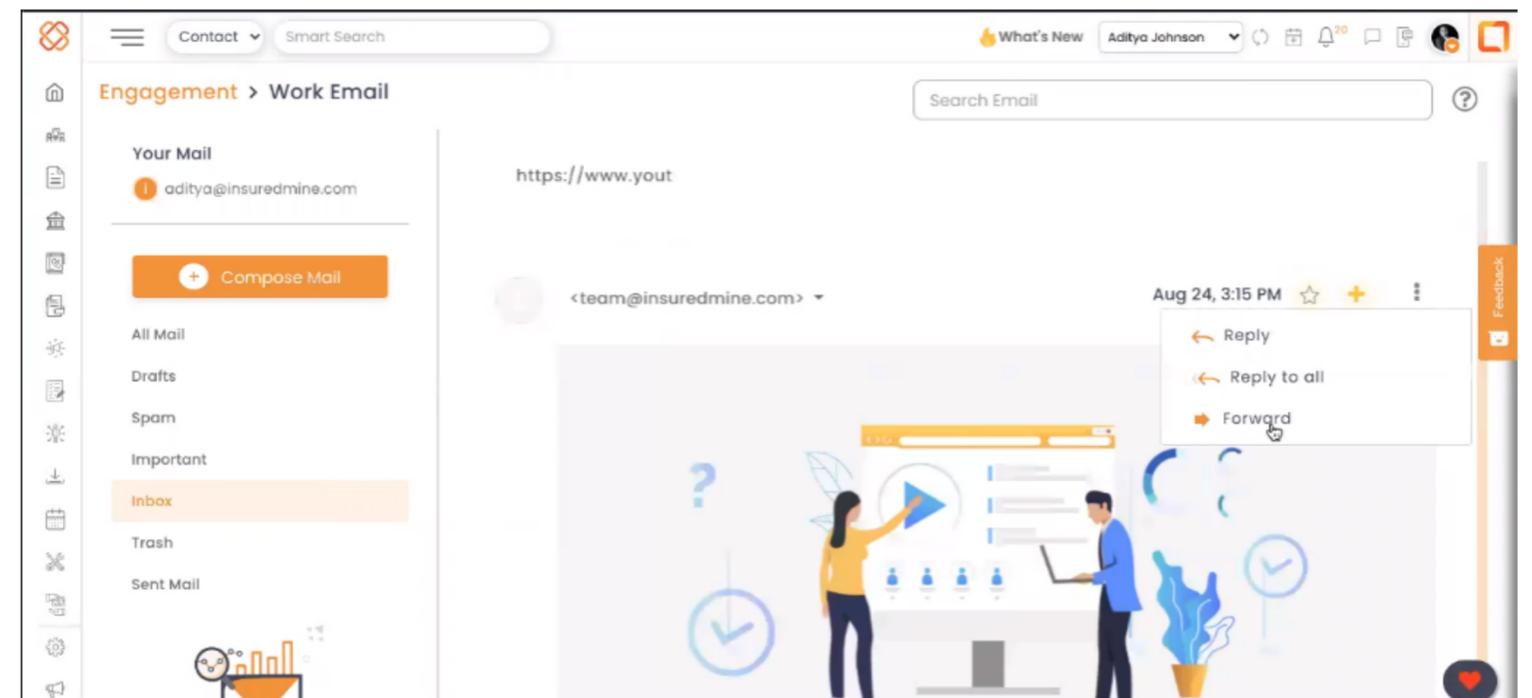
- 1. Navigate to Engagement > Email campaigns > Analytics
- 2. Click on the gear icon towards the top right corner for Settings.
- 3. Select Bad Emails
- 4. On the Bad email screen, you can click on Bounced Emails, Unsubscribe emails, or Complaint email to view the respective list

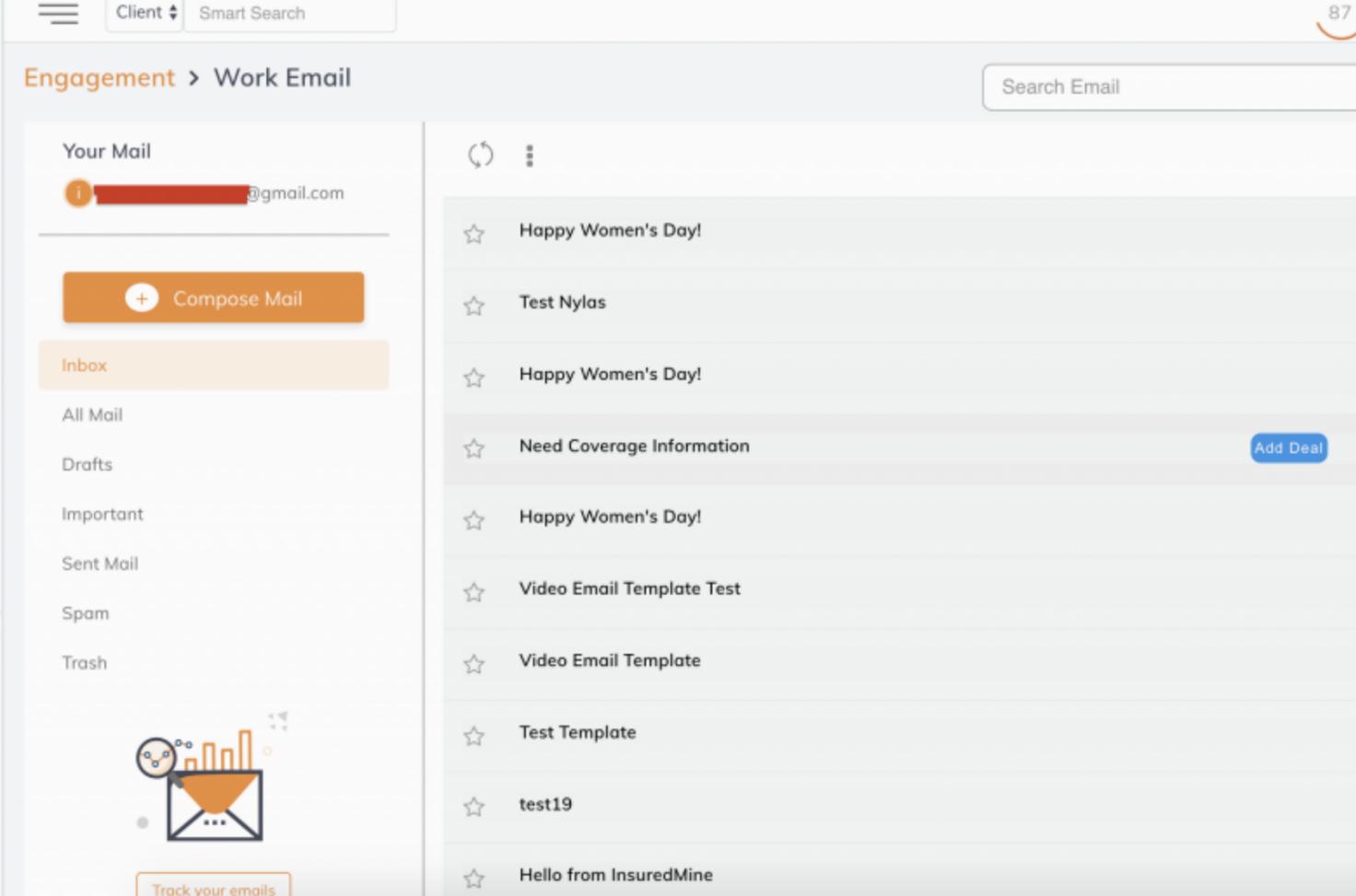


WORK EMAIL IN IM

5. HOW FORWARD EMAILS IN IM?

1. Navigate to the Engagements module
2. In the work mail segment, click Inbox
3. Open the email you want to use
4. Click on the ellipses (3 dots) to the top right and select Forward





6. If I reply to an email in IM will it show up in my email platform?

Yes, the reply email will be seen in the main work email (native application - outlook or Gsuite) account as well as all email are in sync.

Customer-related:

- Renewals approaching notification
- meeting requests,
- quote requests,
- updated information notification

Engagement > Work Email Tracking

Analyze what happens to your emails after you press send LIVE

5 TRACKED EMAILS

4 OPENED EMAILS

2 CLICKED EMAILS

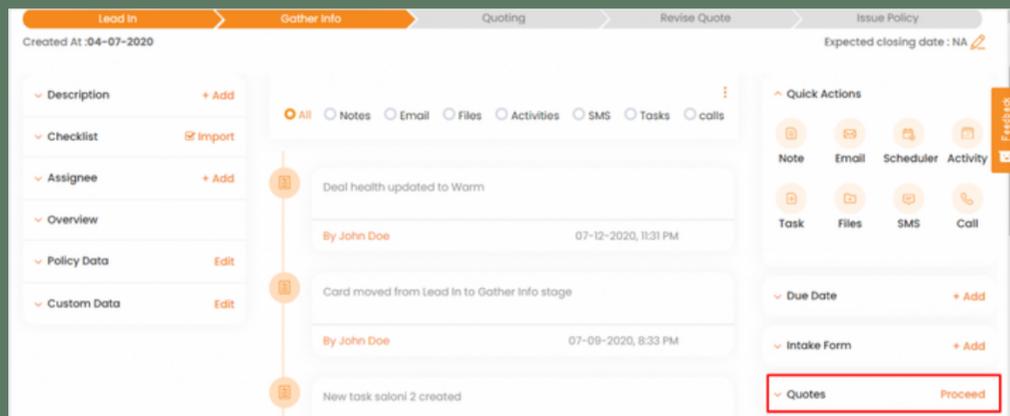
0 REPLIED EMAILS

#	Recipient	Subject	Sent	Open Count	Latest Open	Click Count	Latest Clicked	Action
1	aditya@insuredmine.com	Happy Women's Day!	03-04-2020 01:26 AM	4	03-04-2020 12:38 PM	0	×	👁️
2	aditya@insuredmine.com	Video Email Template Test	03-03-2020 01:02 AM	8	03-11-2020 06:46 PM	1	03-03-2020 01:03 AM	👁️
3	aditya@insuredmine.com	Video Email Template	03-03-2020 12:55 AM	38	03-03-2020 01:01 AM	7	03-03-2020 01:01 AM	👁️
5	aditya@insuredmine.com	Test Sent Email 1	01-13-2020 06:43 PM	2	01-14-2020 07:56 PM	0	×	👁️

Feedback

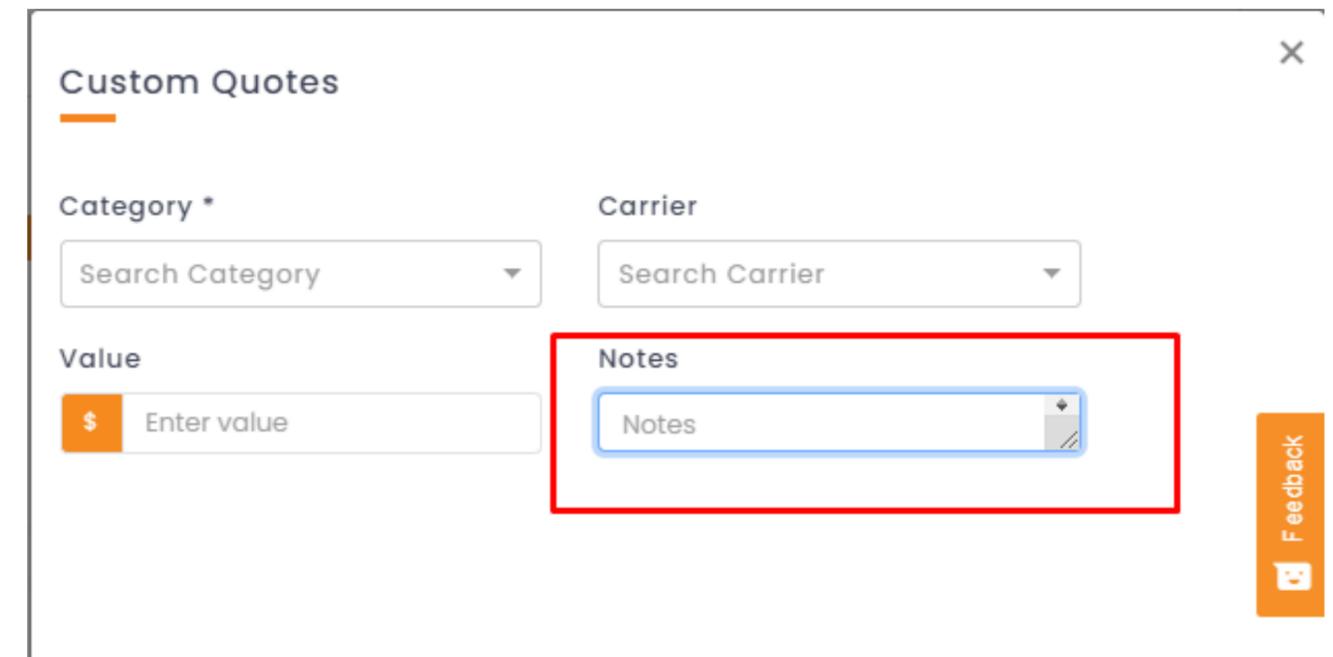
7. How to add a quote?

1. Navigate to Pipeline Manager
2. Click on the deal card for an expanded view
3. Click Proceed in the Quotes segment
4. Fill out the necessary fields



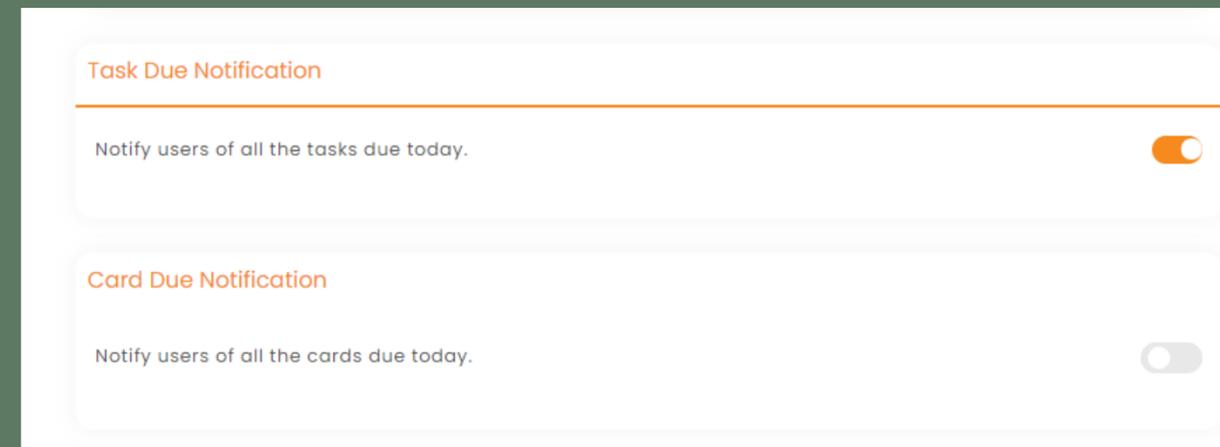
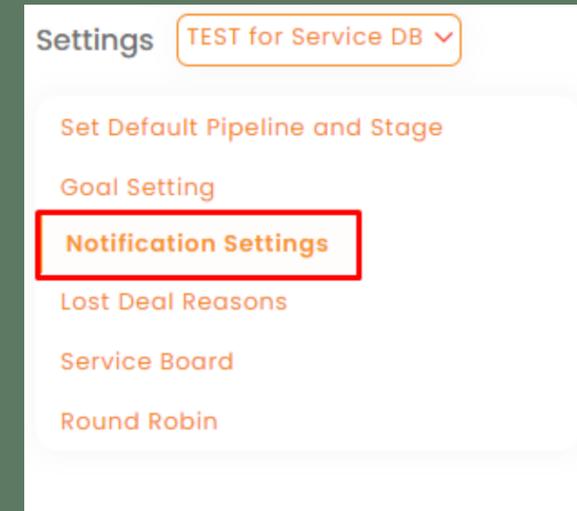
8. What is the notes feature in Quotes for?

- Add custom quotes
- Add policy info, product details
- Any other relevant information



9. How to enable/disable notifications for tasks and cards due?

1. Make sure you are logged in as Manager(Admin)
2. Navigate to Pipeline Manager
3. Click on the gear icon and select Settings.
4. Select Notification Subscription on the left panel in the Settings screen



10. CAN DEALS REACH INSURED MINE FROM THE WEBSITE?

Yes, deals reach Insuredmine through the intake forms on the website.

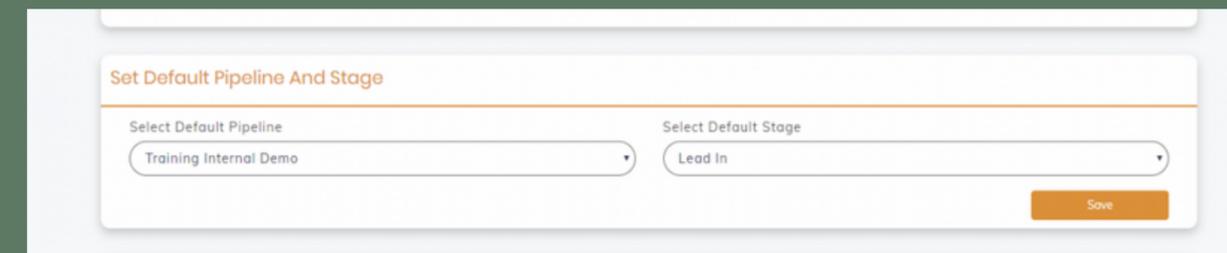
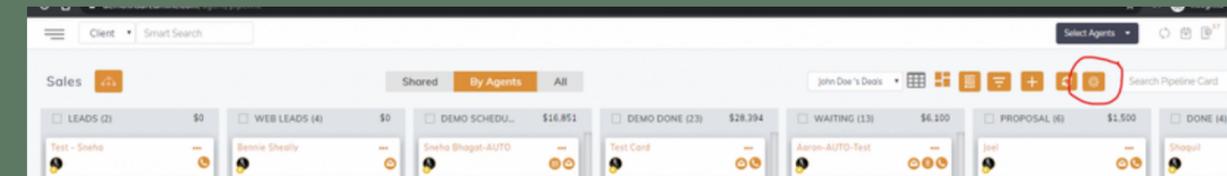
Click to know more about implementing intake form or quote sheet iframe into the website.

HOW TO SET UP?

1. Go to Pipeline Setting
2. Set Default Pipeline And Stage selection.

WHAT THIS ALLOWS?

This will allow all deals go from "Get Quotes" button on the agent public profile to come directly to specified pipeline to a specified deal stage.



THANK YOU!

To learn more please visit:

[Knowledge base](#)

Email: support@insuredmine.com

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