#### 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

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## 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?

- 1. Navigate to Engagement> Email campaigns >
  - Analytics
- 2. Click on the gear icon towards the top right corner for Settings.
- 3. Select Bad Emails
- - Bounced Emails, Unsubscribe emails, or



- Bad emails undermine your marketing efforts

- 4. On the Bad email screen, you can click on
  - Complaint email to view the respective list

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## WORK EMAILIN 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



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

#### **Customer-related:**

- quote requests,

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.

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

## 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

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## 8. What is the notes feature in Quotes for?



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

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## 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



Task Due Notification

Notify users of all the tasks due today

#### Card Due Notification

Notify users of all the cards due today.

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## 10. CAN DEALS REACH INSUREDMINE 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.

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## THANK YOU!

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

