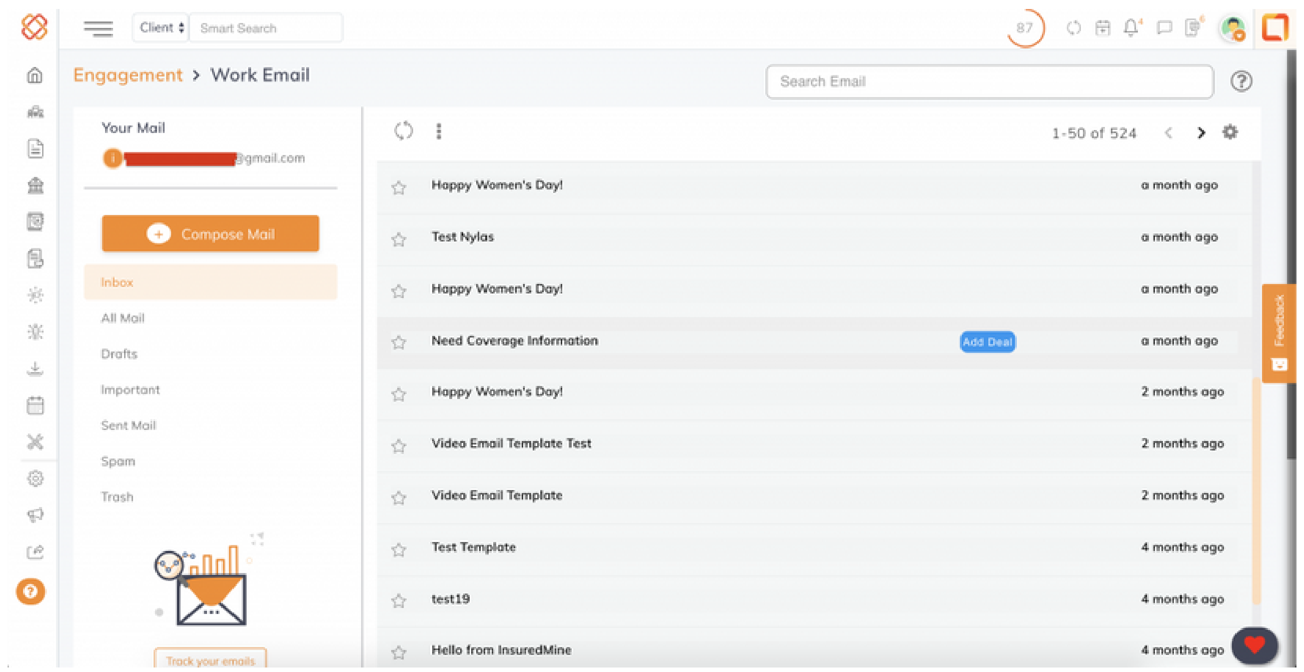
WITH AMANDA RICHARDS
FRIDAY OCTOBER 30, 2020

Daily Bite Size Training

Topic:
10 Most Common FAQ Answered!

1. **Can deals be added from the work email inbox?**

Yes, the deals can be added through the add deal button on the email inbox list. Also, within the email there is an option to add deal by clicking the + icon.



2. Are email campaigns only for bulk emails? Can I also use an email campaign for sending emails to a single customer?

Email campaigns are not just for bulk email. It is possible to run a campaign for a single contact through the **Single contact drip.**

3.Can I automate email & text communication in the pipeline?

Yes, you can automate email and text communication in the pipeline manager.

- Navigate to expanded deal card
- Click on Add drip button

4.What kind of notification is received by an agent in the agent portal?

Customer-related:

- Renewals approaching notification
- Meeting requests
- Quote requests
- Updated information notification

Insuredmine related:

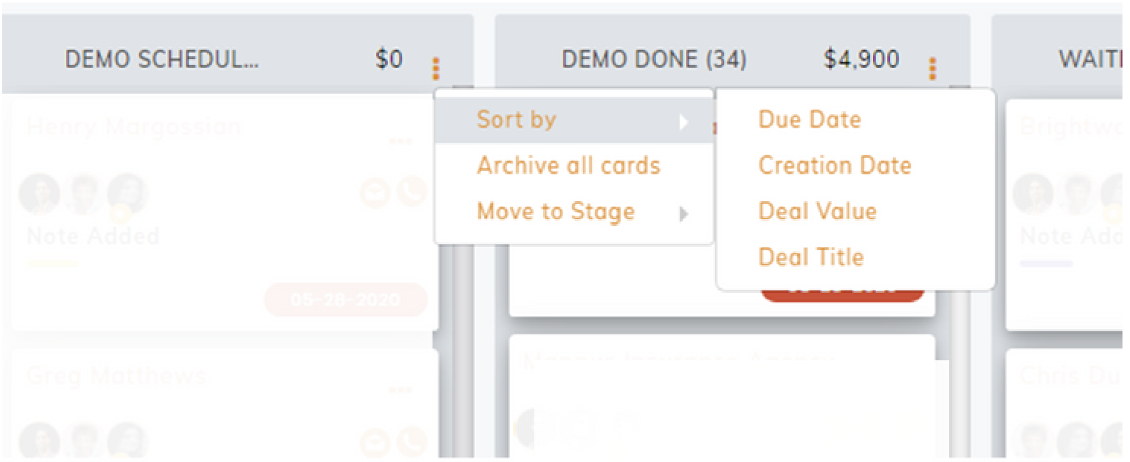
Any new feature update information is also shared with agents in a notification, in a separate tab called Features.

5. What does the eye icon mean on top right of my task list?

The eye icon reveals the detailed analytics of the task list.

6. How to sort deal cards within a stage?

1. Go to the Pipeline manager module
2. Click on the action dots (3 dots) in the deal card stage name as shown in the image below
3. Click on Sort by and select the relevant action
    a. Due Date
    b. Creation Date
    c. Deal Value
    d. Deal Title



7. Is there a draft folder for email campaigns where I can find the incomplete campaign which I left unfinished while creating?

1. Go to the Engagement module
2. Click Email Campaign Analytics
3. Under the Drafts section, you can find all your unfinished campaigns.

8. Where can I view the text content of the sent bulk text campaigns?

1. Go to the Engagement module
2. Click Analytics in Bulk text,
3. Click on the campaign and you can find the sent bulk text campaigns

9.What information are available in the accounts directory?

- Account name
- Primary contact
- Premium
- Number of policies held
- City
- Agent name

10. What are Policies by me and x dates?

1. **Policies by me** indicate the policies assigned to the agent
2. **X dates** refer to third party data of policy nearing expiry dates.

X Dates are selling opportunities for agents as the clients are actively looking for policy quotes at a cheaper rate.

THANK YOU!

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Knowledge base

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