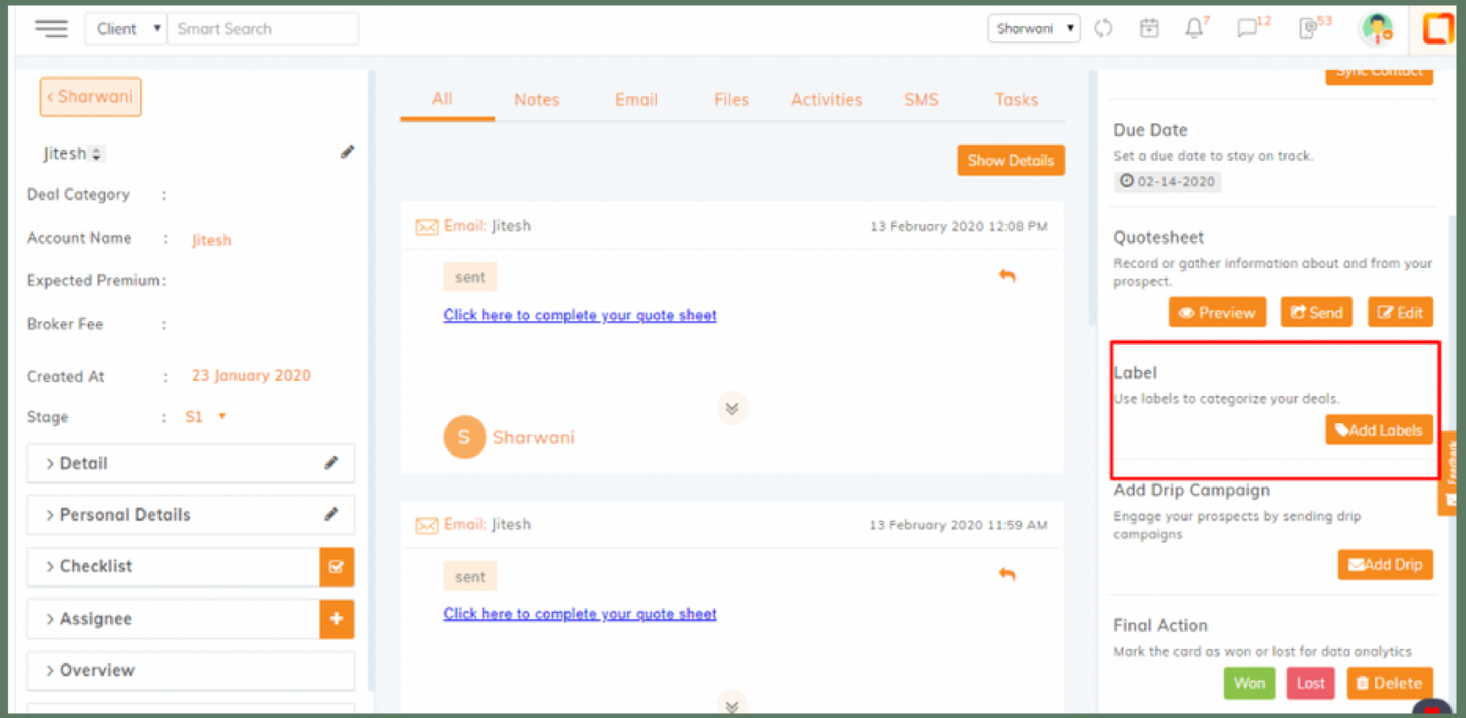
Daily Bite Size Training

Topic:
Add Labels

WITH AMANDA RICHARDS
MONDAY DECEMBER 7, 2020

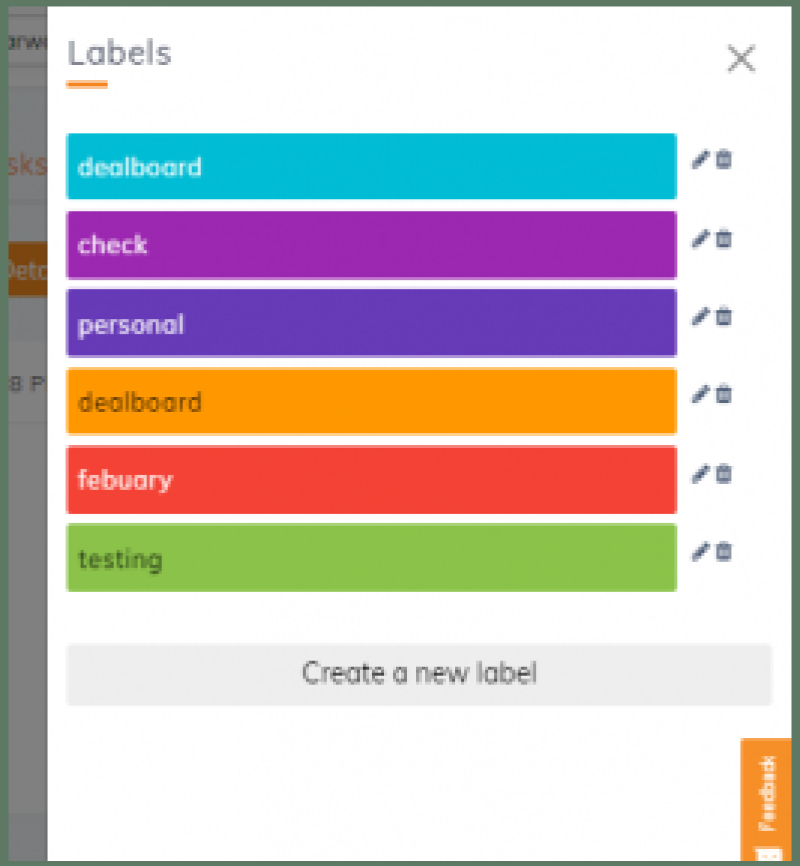
Purpose of Labels

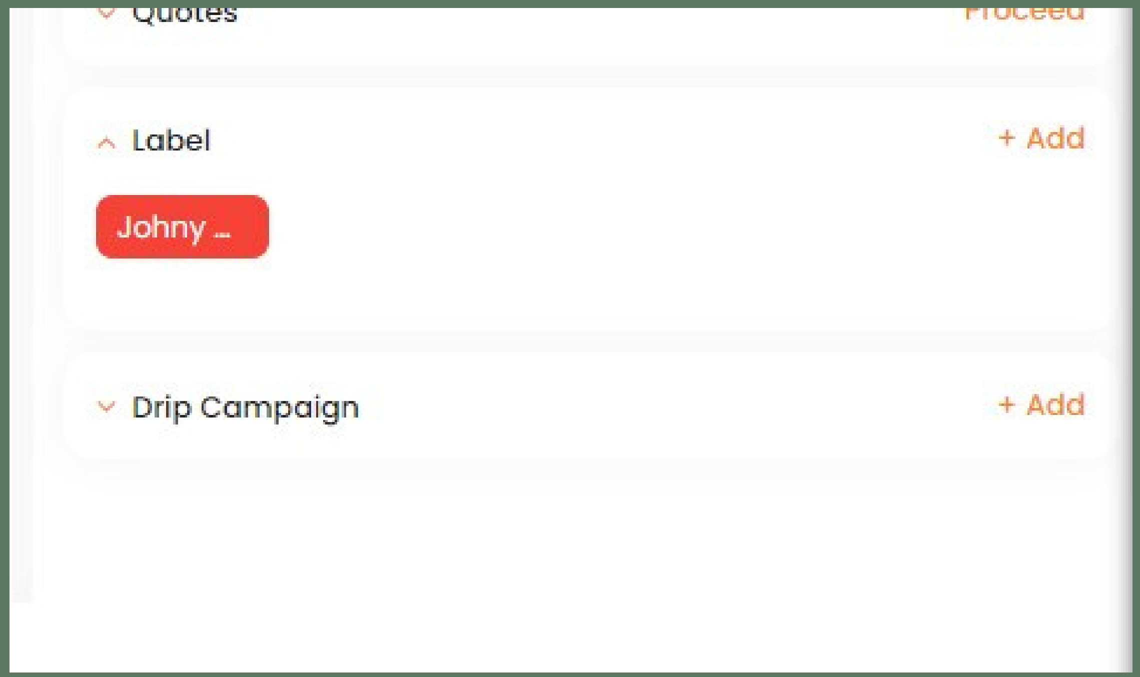
- Labels help you categorize deals
- You can label each deal as you wish
- Add as many labels as you would like
- *Example: Adding labels for referral channels*



How to Add a Label

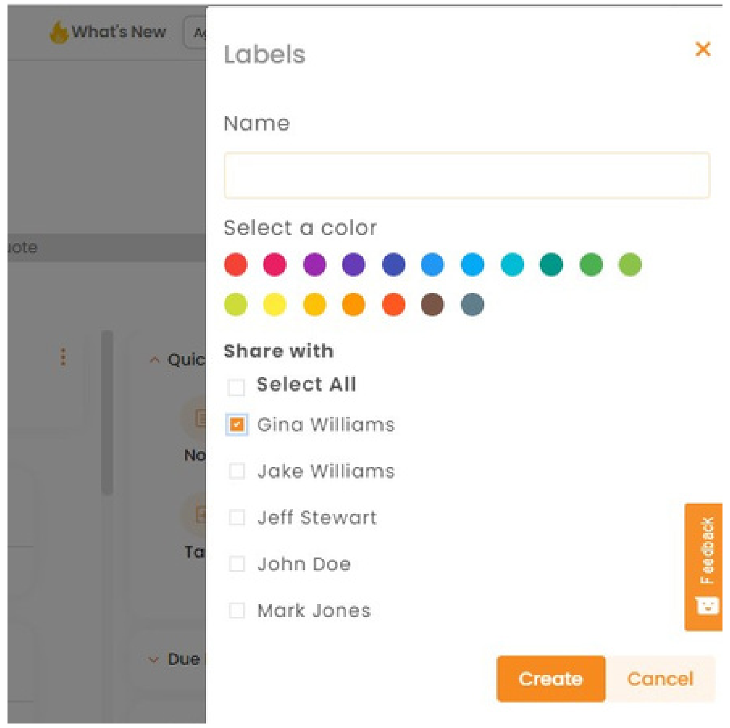
1. Go to Pipeline Manager and open the dealcard
2. Select Add Labels Under Label on the Actions board to the right
3. You will get a drop-down menu of all of the current labels available
4. Add multiple labels to one deal card, or you can create new labels.





Share Labels in Pipeline Manager

- Sharing labels helps to easily track deals
- Enables maintaining regularity in the system
- Similar to sharing tags in contacts



How to Share Labels

1. In the Pipeline Manager, expand the deal card you want to work on
2. Click the Add label under Label field to the right
3. Click create a new label or edit(pen) icon of the existing label
4. Under Share with segment, mark the agent names to share labels or click select all
5. Click Create

What are the benefits of labels?

1. Labeling where a deal came from will help you **identify the lead**
2. You can assign a label & later **run a report** to show you where your leads came from.
3. Labels are an attribute that you may want to **assign to the deal**

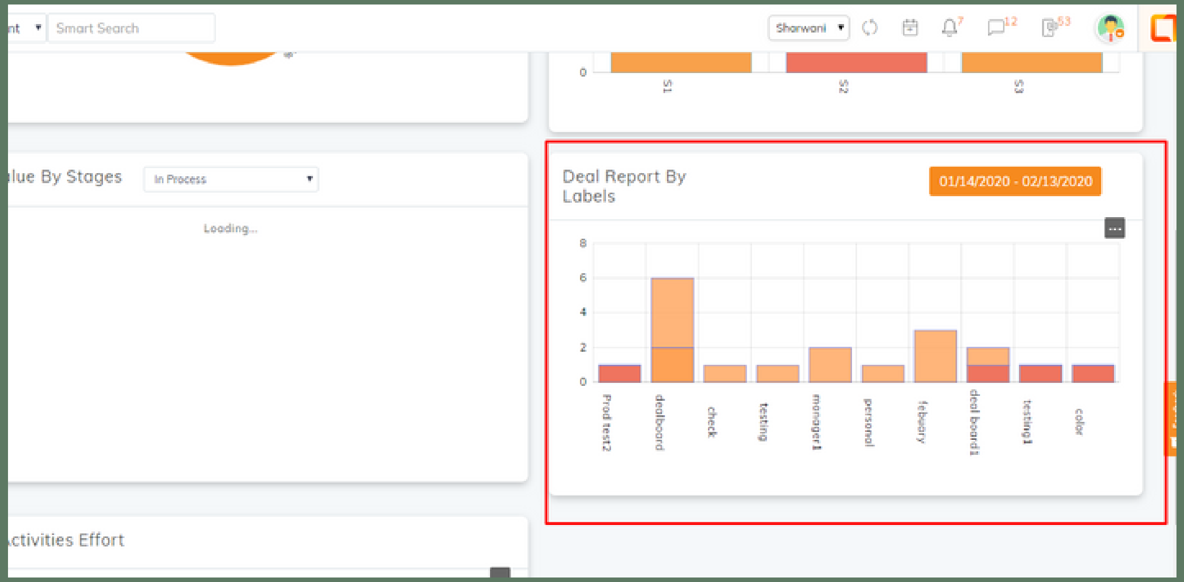
Examples of Labels

Lead source

Lead size

Priority

Anything else that will help you categorize and analyze in the future



THANK YOU!

To learn more please visit Knowledge base

Email: support@insuredmine.com

Join our Facebook Group

CALL: +14696161821

FOLLOW US!