

Changes to how you view and access agents: user guide

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At a glance

You will now only see results from agents you own or are subscribed to. Public agents are still visible to everyone, but you choose which ones to subscribe to.

What	Before	After
Results you see	Your agents plus every public agent	Only agents you own or are subscribed to
Public agents	Results shown to everyone automatically	Listed on the Browse all agents page; subscribe to see results
Sidebar	Mine, Teams and Public tabs	Every agent you're subscribed to, grouped by agent type
Monitoring agents	As before	Everyone in your organisation is always subscribed
Admins	Saw only their own and public agents	Optional permission to view and manage every agent

The aim is a cleaner workspace: fewer results you didn't ask for, and a clear way for admins to keep track of every agent in the organisation.

Your agents

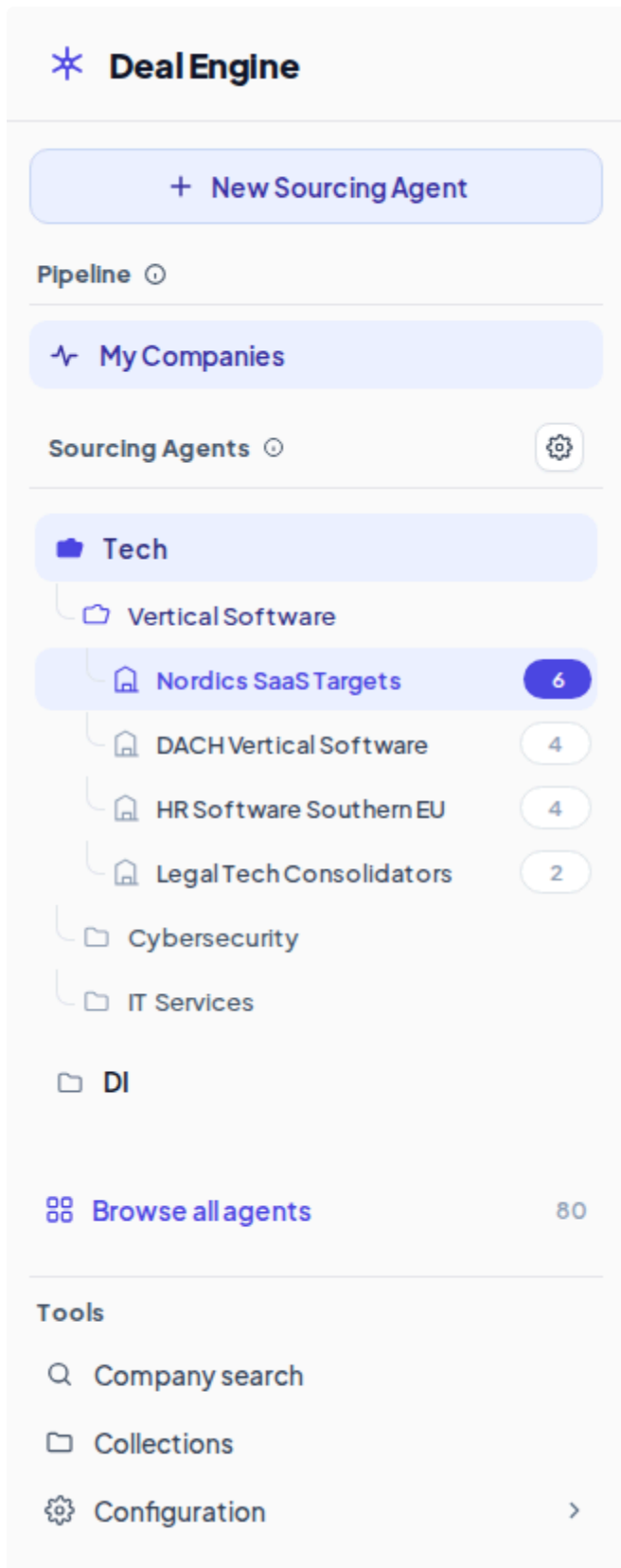
An agent is "yours" if you are its owner or a subscribed member. Only these agents send you results.

- **Owner:** you created the agent. You are subscribed automatically and cannot unsubscribe.
- **Subscriber:** you subscribed to a public agent, or were added to one. You can unsubscribe at any time.

Your sidebar

The Sourcing Agents list in the sidebar changes in three ways:

- **Membership filter:** it shows only agents you're subscribed to: agents you own, were added to, or subscribed to yourself. The Mine, Teams and Public tabs are removed.
- **Grouping:** agents are grouped by agent type by default. Sector grouping, the existing sector-based view, is still available and is set for your organisation.
- **Entry point:** select **View all** next to Sourcing Agents to open the Browse all agents page, where a toggle lets you subscribe or unsubscribe.



Finding and subscribing to public agents

Public agents are visible to everyone in your organisation, but you only see their results once you subscribe.

1. Select **View all** next to Sourcing Agents in the sidebar.
2. Browse the list, or search by agent or owner name.
3. Switch on the **Subscribe** toggle for any agent you want to follow. It's added to your sidebar and you start getting its new companies.

Switch the toggle off to unsubscribe. Agents you own are always subscribed, so their toggle is locked on.

DealEngine

Agents Second Chair

Browse all agents

Subscribe to an agent to add it to your sidebar and get its new companies.

Subscribe	Agent	Visibility	Owner	New companies
☐	Medical Device Testing Accredited labs testing and certifying medical devices across the UK and EU.	Public	Chris Hale	20
☒	Serviced Offices Providers Independent flexible workspace operators with three or more sites.	Public	Monish Shah	0
☒	Information Services UK UK data and information providers selling subscriptions to professional users.	Public	Dan Byrne	5
☐	Data and Insights V3 Market research and analytics firms with recurring client revenue, £5-50m.	Public	Amir Iqbal	20
☒	Managing General Agents Specialist MGAs underwriting niche commercial lines in the UK and Ireland.	Private	Alina Brook	20
☒	Tech-enabled Services Services businesses where proprietary software drives margin, owner-managed.	Public	Chris Hale	20
☐	Software Founder-owned B2B software companies in Europe with £3-30m revenue.	Public	Monish Shah	20
☒	Specialist Insurance Brokers Commercial insurance brokers focused on a single sector or risk class.	Public	Callum Moss	12
☒	Vertical SaaS Nordics Industry-specific software vendors in the Nordics with high retention.	Public	Amir Iqbal	18
☐	Healthcare Services DACH Outpatient and specialist care providers in Germany, Austria and Switzerland.	Public	Clara Fischer	11

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Unsubscribing from an agent

To stop receiving an agent's results, open the agent and select **Unsubscribe** in the top right of the page, or switch off its toggle on the Browse all agents page.

The Unsubscribe button is disabled on agents you own, because owners are always subscribed. If you no longer need an agent you own, deactivate it instead.

Unsubscribing from a public agent doesn't affect anyone else, and you can subscribe again later from Browse all agents.

Creating an agent

When you create an agent, you are made its owner and subscribed to it automatically. There is nothing extra to set up.

If you mark the agent **Public**, other users in your organisation can see it on the Browse all agents page and choose to subscribe. The create agent window now explains this next to the option. Making an agent public does not send its results to anyone until they subscribe.

Monitoring agents

Every user in your organisation is always subscribed to monitoring agents. You don't need to subscribe to them yourself, and they keep appearing in your sidebar and briefings.

Monitoring agents are also prioritised over sourcing agents.

Admin access to all agents

Administrators can be given a new permission to view and manage every agent in the organisation, including private ones. It is optional and added to a user's role.

With this permission, you log in with your usual details and can:

- View every agent anyone in your organisation has created
- Edit any agent, whoever owns it
- Deactivate any agent
- See deactivated agents and reactivate them

FAQ

Why have results from some public agents disappeared? You now only see results from agents you're subscribed to. Go to **Browse all agents** and subscribe to any you want back.

Will I lose agents I created? No. Owners are subscribed automatically and always see their own agents.

Can I unsubscribe from an agent I own? No. Owners are always subscribed; deactivate the agent if you no longer need it.

Do I need to subscribe to monitoring agents? No. Everyone in your organisation is subscribed to them automatically.

Can other people see my private agents? Only users with the admin permission to manage all agents.