







Daxko Engage: Lead Management Updates and More!









Lead Management | Objection Reasons by Opportunity Type & New Lead Updates

Based on Customer Feedback and for improved tracking of Opportunity Objection Reasons, we've added new Objections Reasons by Opportunity Type. We now include 'Invalid Lead' as an Objection Reason for all Opportunity Types to help you gauge the quality of your leads. There are also unique Objection Reasons for Fundraising Growth, Program Growth, and Childcare Growth which are outlined below.

Fundraising Growth

-  Giving to Another Cause
-  Cannot Afford to Give
-  Undecided
-  Would rather volunteer
-  Would rather give non-monetary gift
-  Invalid Lead

Program Growth

-  Price
-  Location
-  Undecided
-  Work Circumstances
-  Program Offerings
-  Not Enough Time
-  Chose Other Provider
-  Invalid Lead

Childcare Growth

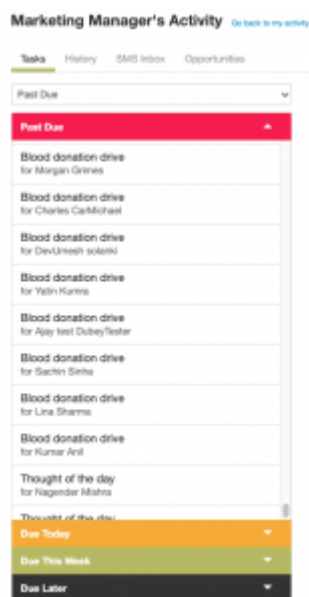
-  Price
-  Location
-  Undecided
-  Work Circumstances
-  Program Offerings
-  Not Enough Time
-  Chose Other Provider
-  Invalid Lead

More updates include adding the newest Lead to the *top* of your lead list and lastly, for Lead Management, the New Lead status will only change once an action is taken (Change Stage, Mark as Converted, Mark as Lost Lead, Reassign) to ensure you can properly follow up with all New Leads.

Interested in learning more about Lead Management for Daxko Engage? Please contact sales@daxko.com for more details.

Activity Page | Control Your Focus with Expandable Sections

This small change is sure to make a helpful impact on your day! Users can control the tasks they wish to focus on with expandable and collapsible sections for Past Due, Due Today, Due This Week, and Due Later tasks.



Group Rules | Membership Types specify which types are disabled

Based on customer feedback, we recognize the importance of identifying which Membership Types have been disabled in Daxko Operations. Group Rules by Membership Types now specify which types are disabled.

- ☐ Adult 123
- ☐ Family
- ☐ JH Monthly
- ☐ Participant DISABLED
- ☐ Senior Adult DISABLED
- ☐ Senior Adult Couple DISABLED
- ☐ Single-Parent Family DISABLED
- ☐ Taxed Membership DISABLED
- ☐ Youth DISABLED

These updates will be available for all associations using Daxko Engage on **Tuesday, September 20**. Please contact support@daxko.com if you have any questions.

Project Thrive: “Ask the Expert” Sessions



The Daxko Team is offering a new webinar series called **Project Thrive**. During our “Ask the Expert” sessions, our team of product experts hold office hours to cover the basics of Daxko solutions AND give you time to ask questions. We’ll be offering new “Ask the Expert” sessions every week, so stay tuned for more...

Check out upcoming and past sessions [here](#).