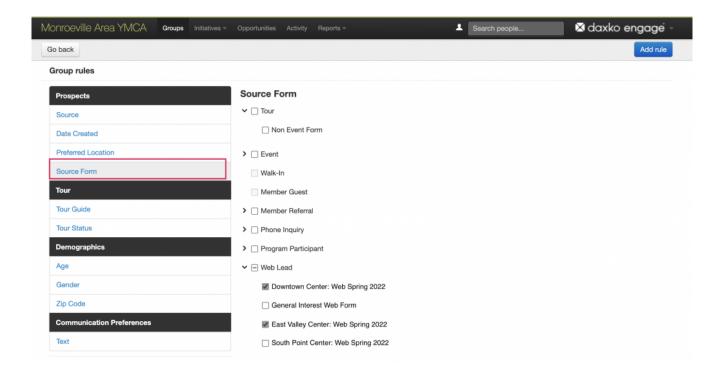
Daxko Engage Release: Prospect Source Form Group Rule

Allowing people to complete a simple prospect form is a lightweight and efficient way for associations to manage prospects. From there, users can then create automated initiatives to follow up with those prospects, ensuring that the right people get the right message in a timely way. And associations using **Lead Management** with Daxko Engage also have the option of assigning these prospect leads as part of an Opportunity Playbook in order to guide them along their prospect journey.

Since the release of <u>prospecting forms</u> in Daxko Operations and <u>prospecting group rules</u>, we have learned from Daxko Engage users of the need to more easily segment prospects by **specific prospect forms**. The new **Prospect Source Form** Group Rule allows users to do just that.



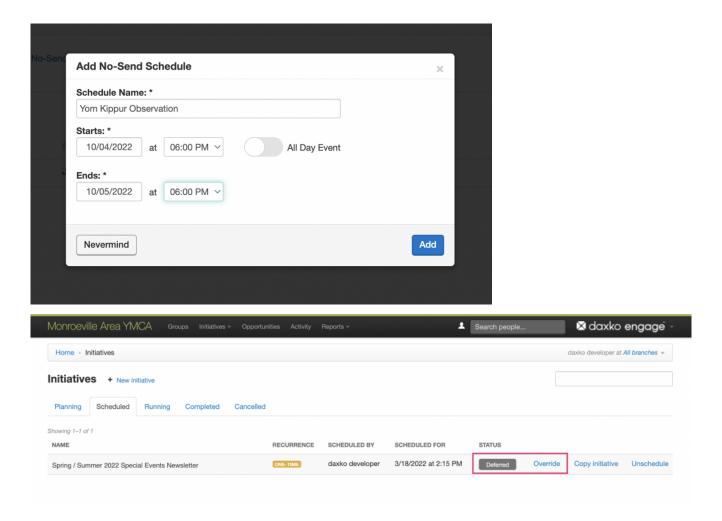
View the full <u>release guide here</u>.

The Prospect Source Form Group Rule will be available for all associations using Daxko Engage on **Friday**, **April 22**. Please contact support@daxko.com if you have any questions.

Coming Soon: No-Send Schedules for Initiatives

Setting up automated initiatives can be a huge efficiency gain for associations using Daxko Engage, as well as a great way to ensure that members receive engagement touchpoints at appropriate times. However, we also understand that there are occasionally holidays and other special events when associations do not want emails or text messages to send to members or the community.

Because of this need, we are excited to share that we will soon introduce a new ability to create **No-Send Schedules**, periods during which communication from initiatives is paused for a short time and deferred until later.



We already have early adopter associations using No-Send Schedules, and we are planning to release this functionality to all associations by the end of May 2022. If your association is interested in taking a deeper look at this before then, please contact the <u>product team</u>.