

# 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 [prospecting forms](#) in Daxko Operations and [prospecting group rules](#), 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.

The screenshot shows the Daxko Engage user interface for the 'Monroeville Area YMCA'. At the top, there's a navigation bar with tabs for Groups, Initiatives, Opportunities, Activity, and Reports. A search bar and a 'Go back' button are also present. The main content area is titled 'Group rules' and features a sidebar with categories: Prospects, Tour, Demographics, and Communication Preferences. The 'Source Form' section is expanded, showing a list of form types with checkboxes: Tour, Non Event Form, Event, Walk-In, Member Guest, Member Referral, Phone Inquiry, Program Participant, and Web Lead. The 'Web Lead' section is further expanded, showing specific forms with checkboxes: Downtown Center: Web Spring 2022, General Interest Web Form, East Valley Center: Web Spring 2022, and South Point Center: Web Spring 2022.

View the full [release guide here](#).

The Prospect Source Form Group Rule will be available for all associations using Daxko Engage on **Friday, April 22**. Please contact [support@daxko.com](mailto: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.

The image shows a screenshot of the Daxko Engage web application. The top part of the image displays a modal window titled "Add No-Send Schedule". This modal contains the following fields and controls:

- Schedule Name: \***: A text input field containing "Yom Kippur Observation".
- Starts: \***: A date and time selector showing "10/04/2022" at "06:00 PM". There is a toggle switch for "All Day Event" which is currently turned off.
- Ends: \***: A date and time selector showing "10/05/2022" at "06:00 PM".
- At the bottom of the modal are two buttons: "Nevermind" and "Add".

The bottom part of the image shows the main interface of the application. The header includes the logo "Monroeville Area YMCA" and navigation links for "Groups", "Initiatives", "Opportunities", "Activity", and "Reports". A search bar and the "daxko engage" logo are also present. Below the header, the "Initiatives" section is active, showing a list of initiatives. The list has columns for "NAME", "RECURRENCE", "SCHEDULED BY", "SCHEDULED FOR", and "STATUS". One initiative is listed: "Spring / Summer 2022 Special Events Newsletter". Its status is "Deferred", which is highlighted with a red box. Other status options shown are "Override", "Copy initiative", and "Unschedule".

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 [product team](#).