

New! Initiative Wizard

When creating an initiative, the last thing any user wants is to lose his or her hard work due to a timeout or an interruption. With this week's release, we will now assist users in saving your work along the way!

Initiative Wizard

Creating an initiative requires multiple steps. Previously, all of these steps appeared on one page, which did not allow users to save their work incrementally. This release introduces an all-new wizard format that guides Daxko Engage users step by step through each portion of initiative creation.

The screenshot shows the 'Create Initiative' wizard in the Daxko Engage application. The interface features a dark header with the 'Test Client1' name, navigation links for 'Groups', 'Initiatives', 'Tasks', and 'Reports', a search bar, and the Daxko Engage logo. A breadcrumb trail indicates the path: Home > Initiatives > Create Initiative. The main content area is titled 'Create Initiative' and displays a four-step progress bar: 1. Identify the Purpose (active), 2. Select Group, 3. Define Workflow, and 4. Review. Below the progress bar, the 'Identify the Purpose' step contains several form fields: 'Initiative Name' with a text input, 'Branch' with a dropdown menu and a note about messaging, 'Purpose' with a dropdown menu and a note about email preferences, and 'Recurrence' with radio buttons for 'ONE-TIME' (selected) and 'ONGOING', accompanied by a detailed note about one-time initiative rules. At the bottom right, there are three buttons: 'Cancel', 'Delete', and 'Save and Continue'.

For each step, there will now be a *Save and Continue* button. Should a user need to perform a different task, the initiative will be preserved to the most recently saved step in the process.

Once the user is ready to resume the creation of the initiative, the user will navigate to the list of planning initiatives and select the name of their initiative to proceed.

Step One: Identify the Purpose

While step one includes the same set of fields, you will first notice the new *Save and Continue* button here. Once a user has added information to the required fields, this initiative may be saved and accessed at a later date.

Test Client1 Groups Initiatives Tasks Reports Search people... **daxko engage**

Home > Initiatives > Create Initiative Becki Irby at All branches

Create Initiative

1 Identify the Purpose 2 Select Group 3 Define Workflow 4 Review

Initiative Name *

Branch * Branch the messaging will be tied to, and not the branch for members.

Purpose * This list drives the email preferences that your recipients can choose. Any emails in this initiative will be tied to this email preference option.

Recurrence * ☒ ONE-TIME ☐ ONGOING Initiatives set to one-time will run for the people in the associated group only at the time of initiative launch. People who meet the group's rules after initiative launch will not be included in the initiative.

Step Two: Select Group

Step Two now displays an approximate number of individuals in each group. Additionally, users now have the ability to quickly preview the group rules and, if the group was imported, view the details of the import process.

Test Client1 Groups Initiatives Tasks Reports Search people... daxko engage

Home Initiatives Create Initiative Becki Irby at All branches

Create Initiative

Identify the Purpose **2 Select Group** 3 Define Workflow 4 Review

Created Groups Search by group name...

<input checked="" type="radio"/> Active Adults	14,145 people
<input type="radio"/> 1 member Dane	1 people
<input type="radio"/> adult and child	2 people
<input type="radio"/> Another test group from templates	17,106 people
<input type="radio"/> Auburn Valley Mem Types	825 people
<input type="radio"/> Birthdays Next Month	1,304 people
<input type="radio"/> Camp Have Not Registered	20,720 people
<input type="radio"/> DG rule	0 people
<input type="radio"/> Discount Group Safeco	86 people

Step Three: Define Workflow

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Home Initiatives Create Initiative Becki Irby at All branches

Create Initiative

Identify the Purpose Select Group **3 Define Workflow** 4 Review

Add Email ☒ Add Task Add Wait less than 1 day to complete.

STEP 1

Email Subject *
You can help!

From name *
Becki Irby

From address *
birby@test.com

Edit Email Remove

STEP 2

Task Name *

Instructions

Complete within *
0 days.

After this amount of time has passed, the task is considered *past due*.

Remove

Defining the workflow of the initiative is typically the most time-consuming step. Users will continue to have the ability to add emails, tasks, and wait times.

Most initiatives require creative and detailed efforts in the Daxko Engage email

editor. We know that losing any of that hard work can set back important projects for your team. Therefore, we will now save progress on step three, including the email editor, *every three minutes* to ensure that no work is lost along the way.

Step Four: Review

Step Four will now offer a full screen view of all of these details to more clearly lay out each portion of the initiative. Whether a user is previewing the email design or wanting to understand the estimated run time of an initiative, all of these details are easily accessible.

The screenshot displays the 'Create Initiative' wizard in the Daxko Engage system, specifically the 'Review' step. The interface is divided into two main sections: a left sidebar for initiative details and a right section for the email preview.

Top Navigation: Test Client1 | Groups | Initiatives | Tasks | Reports | Search people... | daxko engage

Breadcrumbs: Home > Initiatives > Create Initiative

User: Becki Irby at All branches

Progress Bar: 1. Identify the Purpose (checked) | 2. Select Group (checked) | 3. Define Workflow (checked) | 4. Review (active)

Initiative Details (Left Sidebar):

- Name:** Major Donations
- Branch:** Bellevue Family YMCA
- Purpose:** Giving
- Recurrence:** ONE-TIME
Initiatives set to one-time will run for the people in the associated group only at the time of initiative launch. People who meet the group's rules after initiative launch will not be included in the initiative.
- Group:**
Erika - template copy - Member Communications - Gener
• *Home branch is Association Office
There are currently 50 people in this group.
- Workflow:**
This workflow has 3 step(s) and will take about 7 days to complete.
1. Email: You can help!
2. Wait: 5 days
3. Task: Personal Phone Call (2 days to complete)

Email Previewer (Right Section):

- Previewer:** You can help! (dropdown menu)
- Views:** Mobile | Desktop (selected)
- Header:** Header placeholder image (600px X 150px)
- Title:** Write a Short Title
- Text:** If you want to feature more than one topic, or share more information about a single topic, the 1:2 layout works best.
- Image:** Placeholder image (200px X 150px)
- Action:** Write a brief overview that contains one or two sentences about the event or offering. On the other side of your text, choose a relevant image and customize the button below to drive them to an action.
- Promote:** This section raises interest in what you are trying to promote.
- Button:** Button

Love this new initiative wizard or have feedback or questions? Email support@daxko.com.