New Prospecting Features: Create Forms + More (Training Site Release)
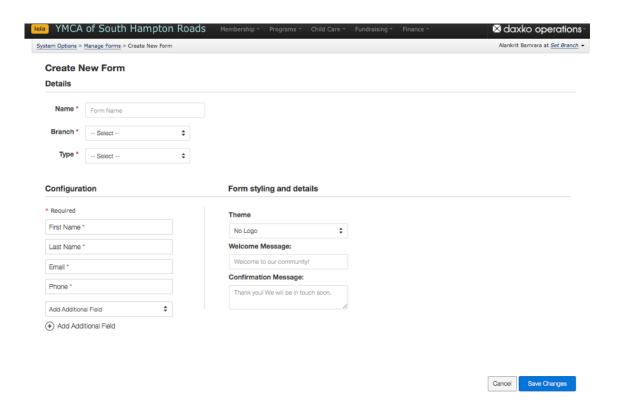
As our customers begin reopening efforts and plan for welcoming their community back, we are excited to release new functionality and other updates to member prospecting in Daxko Operations! These features will be available **Wednesday, May 20**, on your **Daxko Operations Training Site**. We encourage you and your team to begin familiarizing yourself with these new features before the release to the Live Site in **June.**
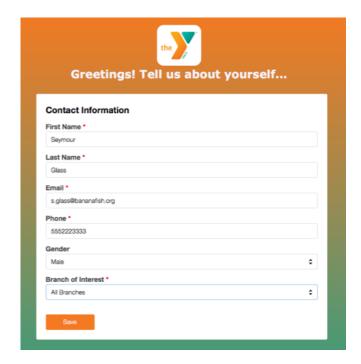
This release includes the following:

- New **Prospect Forms** for Websites and Lead Capture
- Updated **Add Prospect** Experience
- Enhanced **Prospect Profile**
- New **View Prospects** Page
- Read the User Guide for all the details

New! **Creating and Managing Prospecting Forms**

With this release, users have the ability to create simple forms to collect prospecting leads directly into Daxko Operations. This allows people to submit their own lead or interest form, saving valuable staff time.
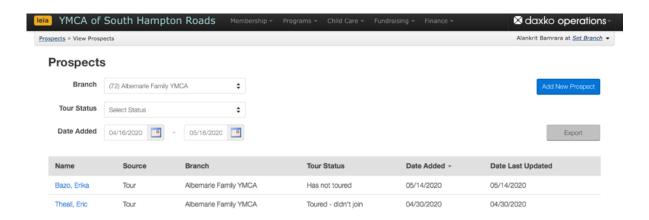
Choose how you would like to use each form: either as an embeddable form or through a URL. If you are embedding the form, copy the script code and add to your website. If you are using the **URL** version of the form, copy the link and share. The URL can also be used to generate a QR code, allowing people to simply scan it with their phone to access a mobile-friendly version of the form.
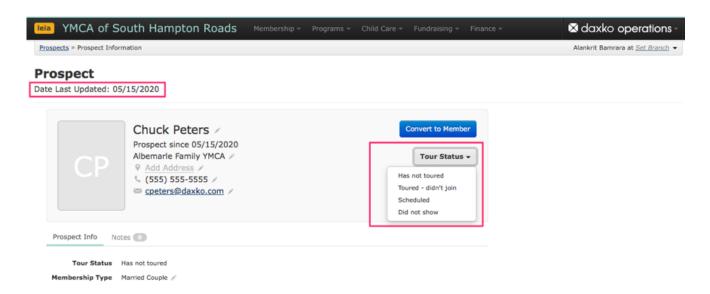

Viewing a List of Prospects

Another new feature for Prospecting in Daxko Operations is the View Prospects

Page. This is where users can see a list prospects who have been entered, whether manually through Add Prospects or through prospect forms. Select a prospect's name to view his or her profile.

Viewing the Prospect Profile

We have revamped the Prospect Profile, making it look a little more like a Member Profile. The Prospect Profile displays any information you have about that person and provides a way to quickly update with any new information or add notes as your relationship with them deepens.

To read the full details of this release, check out this week's Training Site User Guide.

We need your feedback regarding these enhancements to Prospecting prior to our release of this functionality in June to your Live Site. You may send your feedback to Charlie Peters, Associate Product Manager, to cpeters@daxko.com.