Prospect Notes, Texting Updates + New Email Editor Content Option

This week's Daxko Engage release includes another update to improve how your team engages with prospects. Plus, a minor change to the way we handle SMS opt ins, a new email content option, and a few other small fixes.

Prospecting Updates: Notes

Now you can log notes pertaining to prospects. These notes will be displayed as part of the prospect profile in Daxko Engage as well as in Daxko Operations.

Monroeville Area YMCA Groups Initiatives + Tasks Reports +		L Search peop	ale	🛚 daxko engage 🗉
Home + Prospect + New Prospect		Daxko Developer at All branches ~		
New Prospect		What's New been up to?		Note Task Add Unit
NP Prospect		8/19/2020		
Prospect Info New has been a Prospect since 8/7/2020	See more			
Initiatives There are 5 initiatives that engage New	See more			

Text Messaging Opt Ins

Prior to this release, Daxko Engage would occasionally process multiple SMS opt ins for members who share the same primary phone number. This meant that when confirming an opt-in request, we would send multiple messages. With this release, when we receive an opt-in request, we will opt in every member who has that primary phone number and send only one confirmation message.

If you'd like more information about our new text messaging features, please contact <u>marketing@daxko.com</u>.

New "Menu" Content in Email Editor

With this release, we have enabled a new content option for the email editor. If you want to add a simple, text-based link element, use **Menu** block available in the content tab.

	CONTENT	ROWS	SETTINGS
	Т	IMAGE	BUTTON
HOMEPAGE EVENTS DONATE CONTACT US	DIVIDER	SOCIAL	HTML
Dear * first_name *,	H. H		_
We hope you and your family are staying nice and cool during these hot weeks of summer!		☆	=
If you're looking for some ways to stay chill, check out all the events we have coming up in a few weeks	VIDEO	ICONS	MENU
LEARN MORE!			

Additional Features & Fixes

This release also includes a small fix for initiative exports:

• Exports of "Emails Sent" in Initiatives: now, when users export a list of people who were sent an email as part of an initiative, the csv includes a new column, **Recipient Email**, which displays the email address that received the email. This is helpful for instances when an email is sent to a unit primary instead of a child 16 or younger.

The above features and fixes will be available on **Friday**, **August 21**. Read the full release notes <u>here</u>. If you have questions or feedback, please connect with <u>support@daxko.com</u> for more details.