

# Prospect Texting

Engage with your prospects through SMS texting! [Last month](#), we released new prospect group rules with Daxko Engage. Now, include text messages in the initiatives you create to engage prospects.

## Send Texts to Prospects through Initiatives

Text messaging is a great way to connect with your prospects. Send a quick message thanking them for their visit, or follow up with additional information about joining your community.

With this release, initiatives that engage prospects can include text message steps. Simply select the “Add Text” and create your message.

The screenshot shows the 'Edit Initiative' interface for the 'Monroeville Area YMCA'. The top navigation bar includes 'Groups', 'Initiatives', 'Tasks', and 'Reports'. A search bar and the 'daxko engage' logo are also present. The main content area shows a progress bar with four steps: 'Identify the Purpose', 'Select Group', 'Define Workflow', and 'Review'. Below the progress bar, there are buttons for 'Add Email', 'Add Task', 'Add Wait', and 'Add Text'. The 'Add Text' button is highlighted with a red box. Below the buttons, there is a section for 'STEP 1 Text Message \*'. It includes a text area with the message: 'Engage Msgs from the Y: Thxs for stopping by. We enjoyed meeting you the other day! Check out more info on joining here: bit.ly.132efg See you at the Y soon'. Below the text area, it shows 'Characters: 156 | Number of segments: 1'. A blue banner below the text area reads: 'Heads Up! For ongoing and multi-step initiatives, we only send text messages between 8am - 9pm local time.' Below this, there is a section for 'STEP 2 Email Subject \*' with a text input field containing 'Hey ya, Prospect!'. To the right of the input field are 'Edit Email' and 'Remove' buttons. Below the input field, there are two more input fields: 'From name \*' with 'Chuck @ Down East Center' and 'From address \*' with 'chuck@whatsup.org'.

## Manage Prospect Text Preferences

As with any text messaging campaign, it's important to only message people who have opted in to receive texts. We have made it simple to manage opt-in preferences with Daxko Operations, much as you can with members today.

There are four ways to facilitate text opt ins for prospects:

### 1. Prospect Forms

2. Adding Prospects in Daxko Operations
3. Prospect Profile in Daxko Operations
4. Text to opt in for Prospects

To view full details about the text opt-in management process for prospects in Daxko Operations, [view those release notes here](#).

### **Text Preferences in Daxko Engage**

Text preferences are managed in Daxko Operations, but you can view a prospect's text opt-in status on her profile in Daxko Engage. With this release, you'll also have access to new Group Rules for prospect communication preferences. Segment your prospects using rules for the "Allow SMS" opt-in statuses in Daxko Operations.

The above features will be available on **Friday, August 28**. Check out the [full release notes here](#). If you have questions or feedback, please connect with [support@daxko.com](mailto:support@daxko.com) for more details.