

PropFuel Hacks!



11-3-22

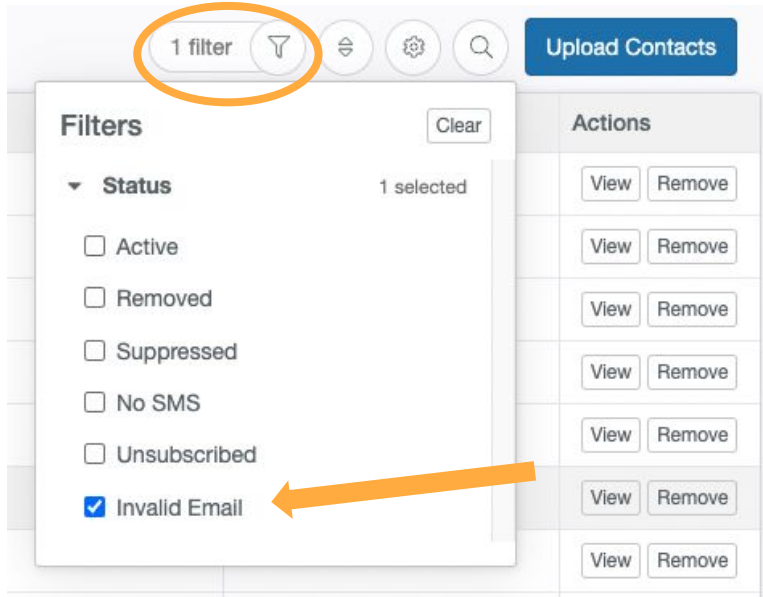
Client Roundtable



Problem: How do I find out which email addresses bounced?

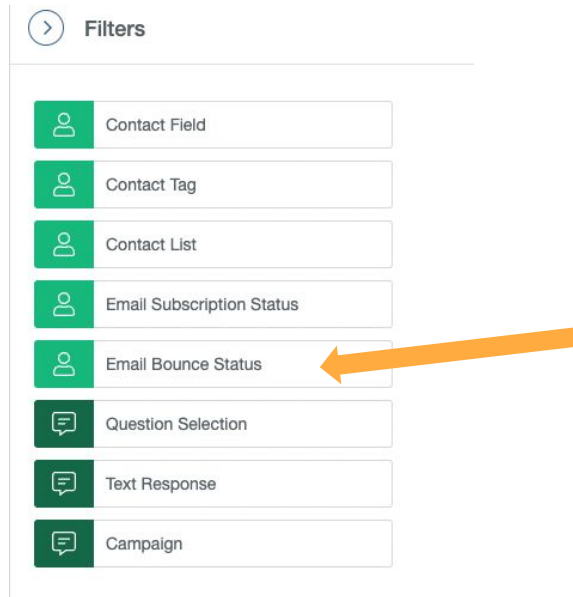
Solution: Invalid emails now show in Campaigns & Lists!

In a campaign:



The screenshot shows a campaign management interface. At the top, there is a toolbar with a filter icon (a funnel) circled in orange, next to the text '1 filter'. Below the toolbar, a 'Filters' dropdown menu is open, showing a list of status options under the heading 'Status' (with '1 selected' next to it). The options are: Active, Removed, Suppressed, No SMS, Unsubscribed, and Invalid Email. The 'Invalid Email' option is checked with a blue square. An orange arrow points from the 'Invalid Email' option to the right. To the right of the filter menu is an 'Actions' column with 'View' and 'Remove' buttons for each row.

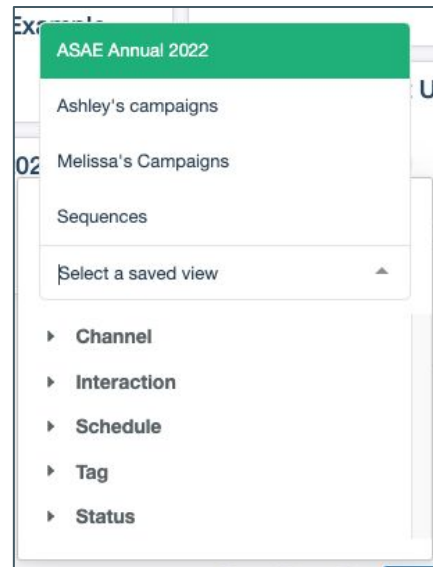
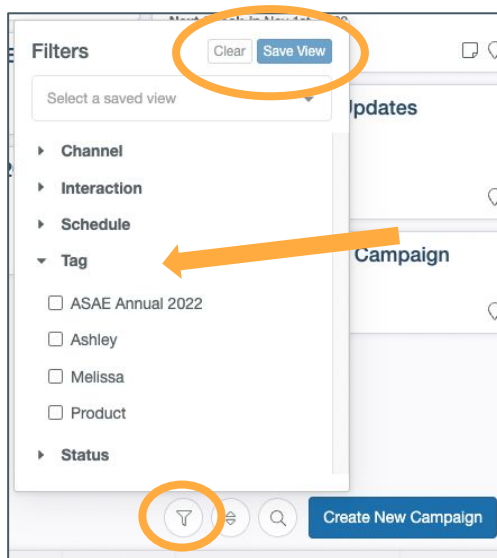
In a list:






The screenshot shows a list management interface. At the top, there is a 'Filters' dropdown menu. The menu is open, showing a list of filter options, each with a green icon and a text label. The options are: Contact Field, Contact Tag, Contact List, Email Subscription Status, Email Bounce Status, Question Selection, Text Response, and Campaign. The 'Email Bounce Status' option is highlighted with a green background, and an orange arrow points from the right towards it.




Problem: My Campaigns page is a mess!

Solution: Use tags and filters to create Saved Views!



Campaigns

1 filter    [Create New Campaign](#)

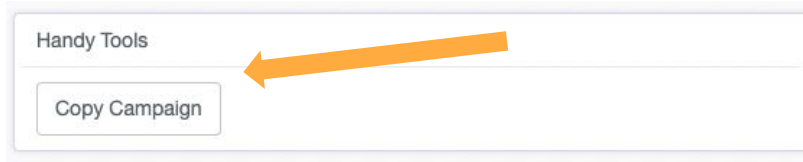
Campaign Name	Channel	Interaction	Activity	Actions
2022 Client Engagement Campaign  Melissa	Email	Outbound Scheduled	Created on Dec 17th, 2021 Last Activity Jun 30th, 2022 Next Send Mar 1st, 2023	 Edit 

Showing 1 of 1 rows

Problem: My scheduled check-in is no longer on the Design tab!
Where did it go and how do I get it back?!

Solution: Copy the campaign!

In the Settings tab in the campaign:

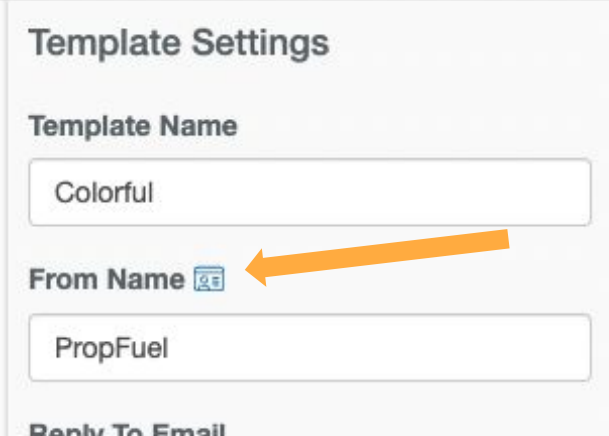


Tips:

- Give the campaign an updated name!
- Archive the old campaign

Problem: I need to customize who the check-in is From based on who the individual is familiar with.

Solution: Use a Personalization Token in the “From” on an email template



The image shows a 'Template Settings' form. It has a 'Template Name' field with the value 'Colorful'. Below it is a 'From Name' field with the value 'PropFuel'. An orange arrow points to the 'From Name' field. There is a small icon next to the 'From Name' label. Below the 'From Name' field, the text 'Reply To Email' is partially visible.

Tips

- The Name of the “From person” must be assigned to the contact (most likely via CSV Upload to a Personalization Token)
- You can input other fields here with a Personalization Token, but a person’s name makes the most sense!
- This is great for regional or chapter segmentation! You could use a chapter leader’s name as the From name, customized to each person’s chapter.

Problem: You need a list of people who didn't answer your check-in/campaign.

Solution: Build two lists that will work together!

- 1. Everyone who answered the question(s). Let's call it "Answered."**
- 2. Everyone in the campaign + not in "Answered" list.**

Didn't Answer Campaign

Last run Oct 28th 2022 1:42 p.m. [Run Now](#)

[< All Lists](#)

[Members](#)

[Settings](#)

[>](#) Filters

Campaign

Has ever been in Join a Committee 2022

[delete](#)

and

Contact List

Contact Is Not In "Answered"

[delete](#)



Problem:

You want to continue the conversation based on how someone answered (but didn't plan ahead!)

Solution: Use lists to group people based on their answers (so you can fire additional actions)!

The screenshot shows a CRM interface for a list named "Committees 2022". The list was last run on Oct 28th 2022 at 1:48 p.m. and has a "Run Now" button. Below the list name are tabs for "Members" and "Settings". To the right, a "Filters" panel is open, showing a filter rule: "Are you sure you don't want to serve on a committee for the coming year?" is set to be equal to "Sure, I'll serve on a committee.". At the bottom right of the filter panel are "Cancel" and "Apply Filter" buttons.

Committees 2022
Last run Oct 28th 2022 1:48 p.m. [Run Now](#)

[< All Lists](#)

[Members](#) [Settings](#)

> Filters

Are you sure you don't want to serve on a committee for the coming year? = Sure, I'll serve on a committee.

[Cancel](#) [Apply Filter](#)



Problem: You don't want contacts in a campaign after they've taken a certain action (renewed, tested, etc.).

Solution: Use lists to suppress people from campaigns!

Suppression Lists

Add Suppression List

A great for solution for...

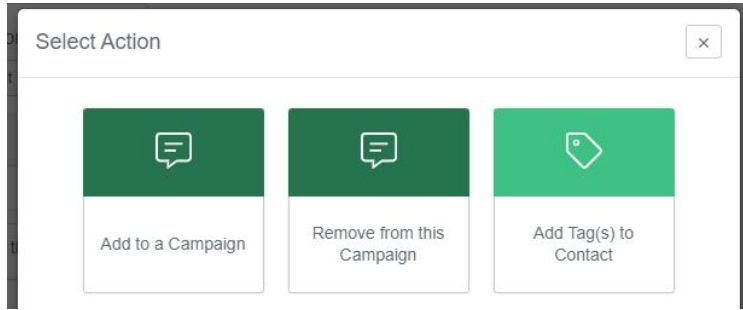
- Suppressing staff after they've tested a campaign that has “add to another campaign” actions.
- Suppressing contacts once they renew, join, register, etc.



Problem:

You want to automate the nurturing process (and have planned ahead!)

Solution: Add contacts directly to a nurture campaign



If Question Answered matches Selection = I will renew, just not now

Then Show Text on Landing Page

and Send Email

and Remove from this Campaign

and Add to a Campaign - 2022 Renewal NURTURE - Said "yes!"

Add Another Action

Could be a drip campaign (immediate action) or a scheduled campaign (later engagement)

Problem: You want to follow-up based on responses in PropFuel or elsewhere (and you planned ahead)

Solution: Use tags in PropFuel or write-backs to other systems




If Question Answered matches Selection = Staying up-to-date on industry research and trends

Then Show Text on Landing Page
and Add Tag(s) to Contact - Industry Research and Trends

Add Another Action



If Question Answered matches Selection = Community

Then Redirect to Another Question - x - New Member Onboarding - Area of Expertise Community 
and Informz - Add Interest

Add Another Action



Problem: You need everyone to answer the additional questions

Solution: Add a tag to the emailed question and remove a tag when they answer the additional question(s)

“Should you remain the primary billing contact for your company's membership renewal?”

Please provide the name and email address of the person we should contact to renew your company's membership.



If Question Answered matches Selection = No
Then Redirect to Another Question - 2023 Renewal - Who is primary contact and Add Tag(s) to Contact - Needs to provide primary contact name

Add Another Action

Saved Workflows

Create New Workflow

Click to Name Workflow

On



If Question Answered matches Text Response Filled
Then Show Text on Landing Page
and Remove Tag(s) from Contact - Needs to provide primary contact name

Add Another Action



Problem: You aren't 1,000,000% confident about your campaign.

Solution: Reach out to your Client Success Manager!

