PropFuel Hacks!

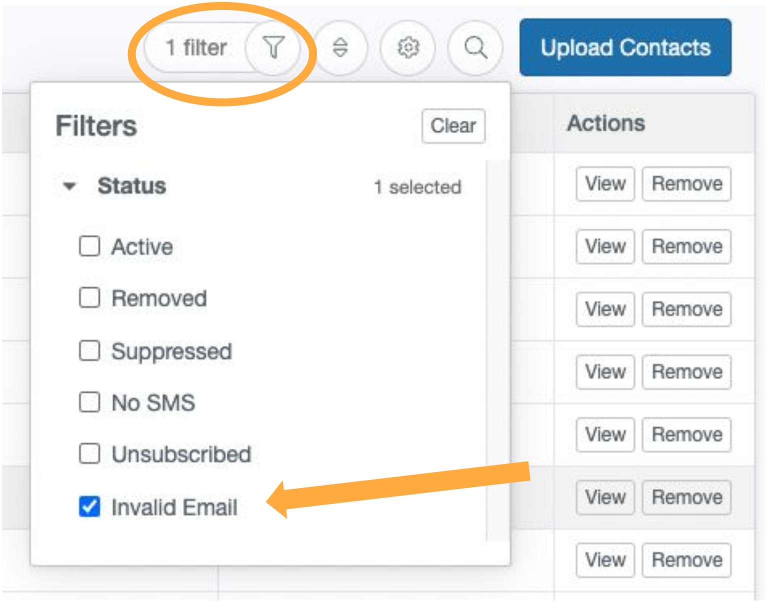
11-3-22

Client Roundtable

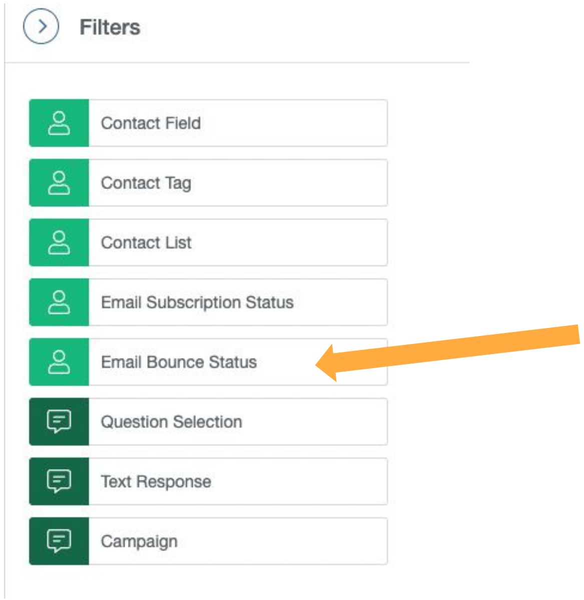
Problem: How do I find out which email addresses bounced?

Solution: Invalid emails now show in Campaigns & Lists!

In a campaign:

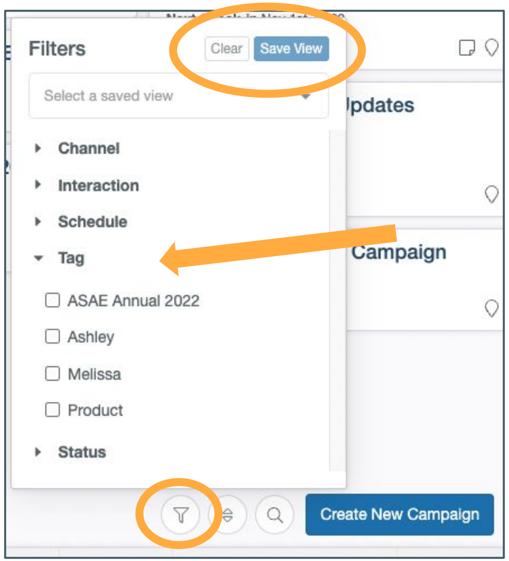


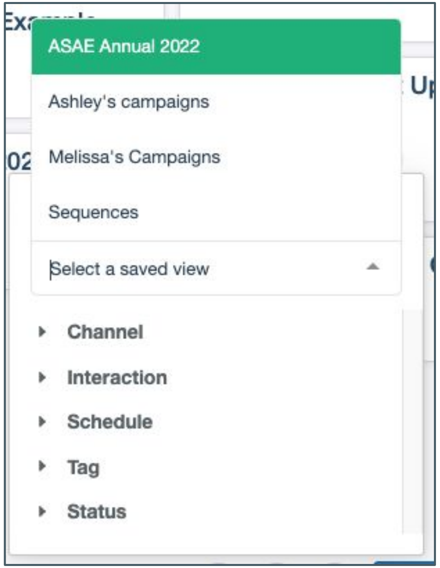
In a list:

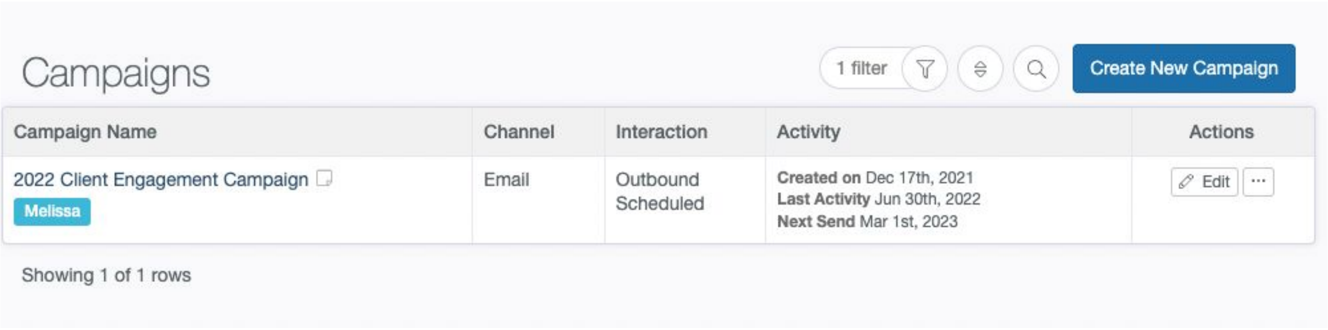


Problem: My Campaigns page is a mess!

Solution: Use tags and filters to create Saved Views!



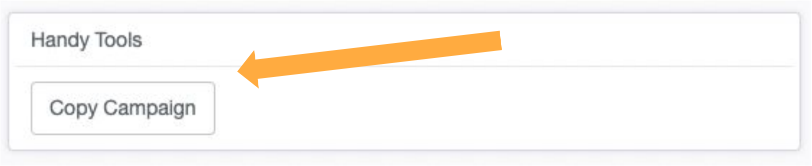




Problem: **My scheduled check-in is no longer on the Design tab! Where did it go and how do I get it back?!**

Solution: Copy the campaign!

In the Settings tab in the campaign:

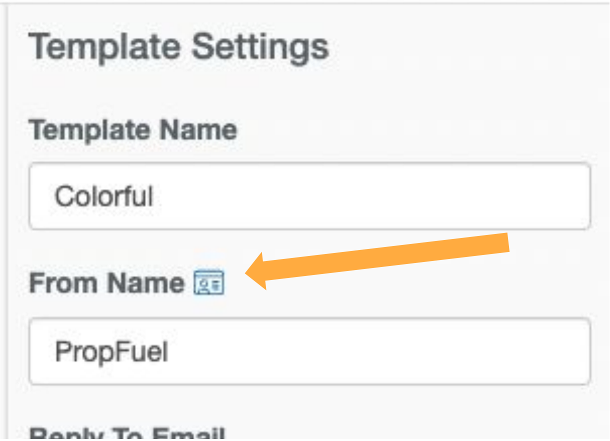


Tips:

- 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



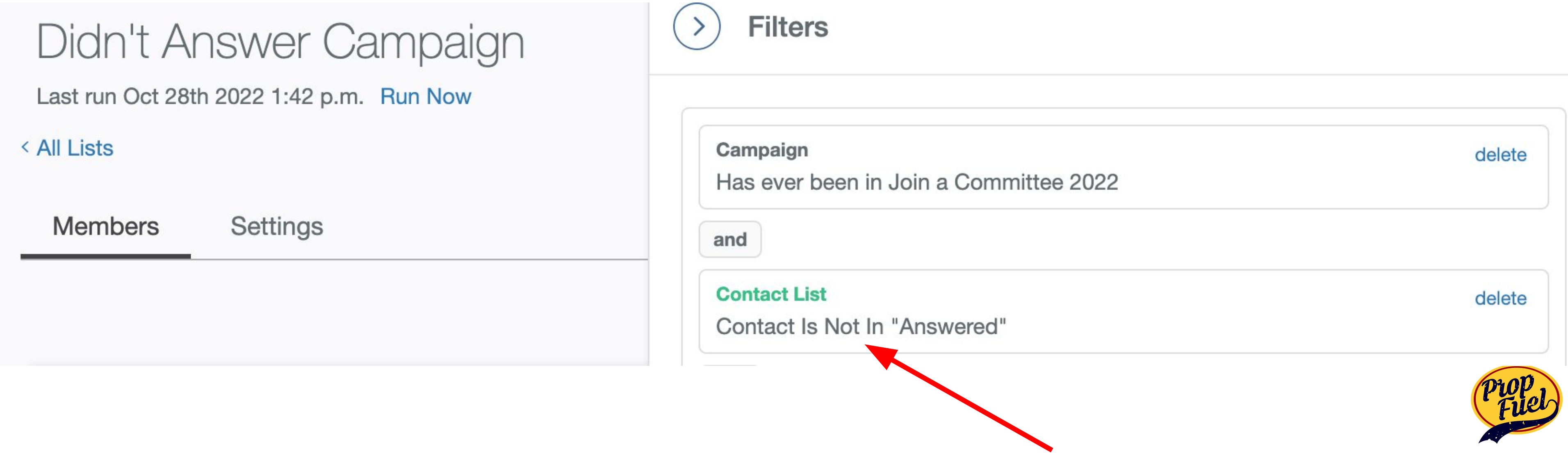
Tips

- 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!

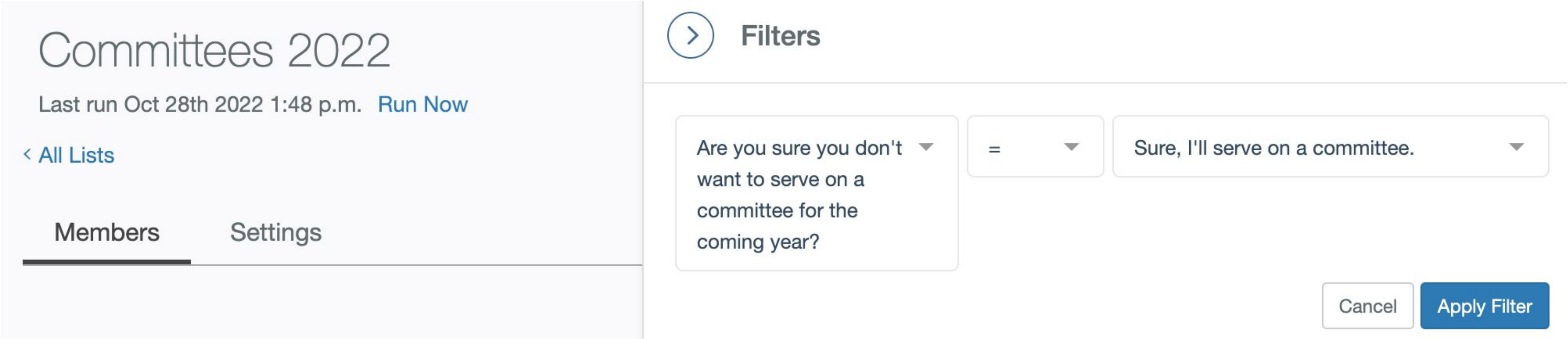
1. Everyone who answered the question(s). Let's call it "Answered."
2. Everyone in the campaign + not in "Answered" list.



Problem:

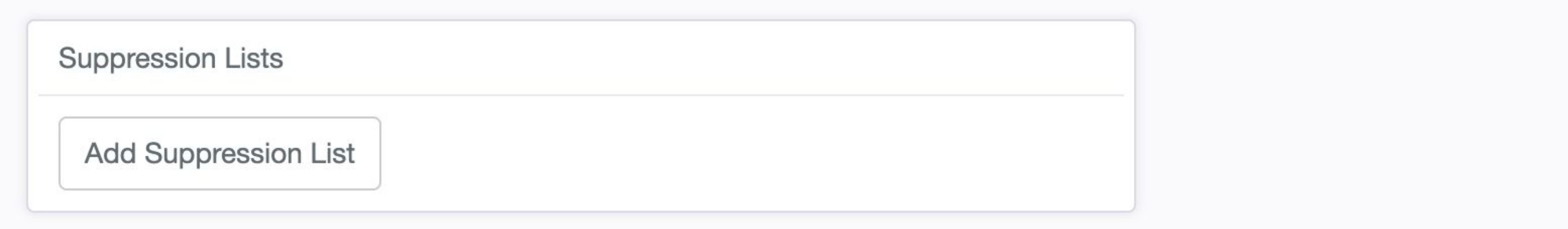
You want to continue the conversation based on how someone answered (but didn’t plan ahead!)

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



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!



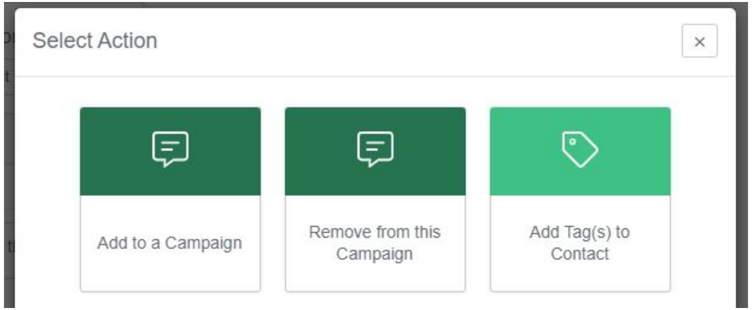
A great for solution for...

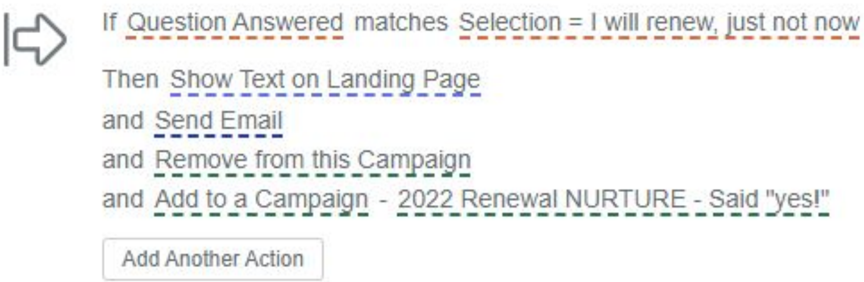
- Suppressing staff after they’ve tested a campaign that has “add to another campaign” actions.
- Suppressing contacts once they renew, join, register, etc.

Problem:

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

Solution: Add contacts directly to a nurture campaign

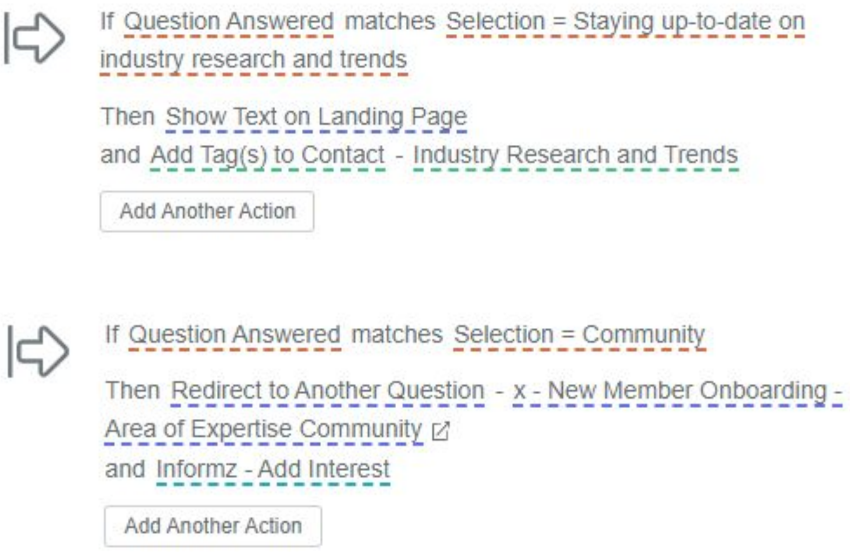




Could be a drip campaign (immediate action) or a scheduled campaign (later engagement)

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



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?”

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

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

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!