

Automation: 6-week post-settlement check-in

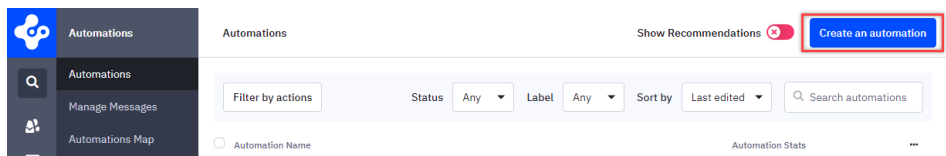
URL to import: <https://tplshare.com/uKw7Hdb>

Overview

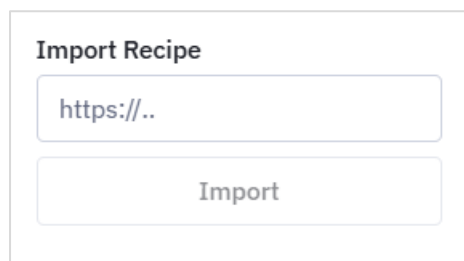
This automation allows you to send a check-in email 6 weeks after a client settled a loan, offering ongoing support for any loan-related inquiries. It also encourages the client to refer others who may need financial services.

Here is how to import the automation:

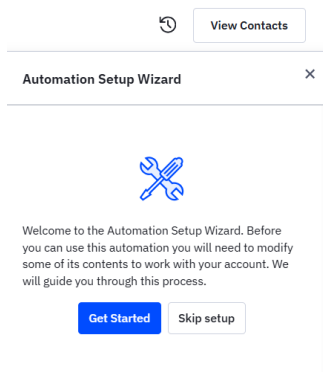
- 1) Navigate to the Automations tab of your account and select “Create an automation”



- 2) On the lower-left side of the page, locate the “Import Recipe field”. Paste the shared automation URL <https://tplshare.com/uKw7Hdb> and click “Import”



- 3) This will create the automation. On the right-hand side of the page, the “Automation Setup Wizard” will appear. Click “Get Started”



- 4) The wizard will guide you through mapping the trigger fields. Select the appropriate Settlement Date field, Timezone, Contact Relationship field, and Loan Status field, and active list subscription field. Complete the trigger setup for all three Opportunities.

Contact's field matches date

Field
1_DateSettled

Timezone
Australia/Victoria

ADVANCED

☒ Segment the contacts entering this automation

Build with segment conditions (3)

1_Relationship X Contains Applicant

AND OR

1_LoanStatus X Is Settled

AND OR

Is subscribed...X At... Mercury

+ Add another condition

Add condition group

Add conditions from a saved segment

Clear all conditions

Step 1/5

Cancel

Next

Contact's field matches date

Field
2_DateSettled

Timezone
Australia/Victoria

ADVANCED

☒ Segment the contacts entering this automation

Build with segment conditions (3)

2_Relationship X Contains Applicant

AND OR

2_LoanStatus X Is Settled

AND OR

Is subscribed...X At... Mercury

+ Add another condition

Add condition group

Add conditions from a saved segment

Clear all conditions

Step 2/5

Cancel

Next

Contact's field matches date

Field
3_DateSettled

Timezone
Australia/Victoria

ADVANCED

☒ Segment the contacts entering this automation

Build with segment conditions (3)

3_Relationship X Contains Applicant

AND OR

3_LoanStatus X Is Settled

AND OR

Is subscribed...X At... Mercury

+ Add another condition

Add condition group

Add conditions from a saved segment

Clear all conditions

Step 3/5

Cancel

Next

- 5) Next page will show the email in this automation.

Send an email - Step 4/5

A marketing email for subscribed contacts

Email name: Automation: 6-week post-settlement check-in

Subject line: How is everything going with your home loan?

Preheader: Write your preheader

From: Marketing Hub - marketinghub@connective.com.au

Reply to: marketinghub@connective.com.au

Tracking: Opens, clicks a link and Google Analytics

Send: Immediately

Predictive Send

Hi %FIRSTNAME%,

Cancel

Finish

Next



- 6) Click “Edit” on the right side of the “From” section of the email. (Highlighted yellow in the screenshot above)

From:

From name

Marketing Hub

From email

marketinghub@connective.com.au

☒ Use this email as my reply to address

Done

- 7) You need to personalise the email so that it appears from the relevant Relationship Manager’s name and email.

- Click the lightning bolt icon next to the “From Name” field.
- In the “Select Field” choose “Contact: BrokerPreferredFullName” so the Relationship Manager’s preferred full name appears as the email sender.
- Place the Default Relationship Manager’s full name in the “Default Name” field.
- Click Save.

Select Field

BrokerPreferredFullName

Default Name ⓘ

Broker Name

Remove Personalization

Close Save

- 8) Complete the same process for the “From Email”
- “BrokerEmail” in the Select Field and
 - the Default Relationship Manager’s Email in the Default Email Field.
 - Click Save.
 - Click Done.

Select Field

BrokerEmail

Default Email ⓘ

broker@connective.com.au

Remove Personalization

Close Save



- 9) Click “Edit” on the right side of the Tracking options. (Highlighted blue in the previous screenshot) Make sure that everything is ticked. Then Click on “Done”.

Tracking:

- ☒ **Open/Read Tracking**
Track when a contact opens or reads your email [Automate](#) ⓘ
- ☒ **Link Tracking**
Track when a contact clicks a link in your email [Customize](#) ⓘ
- ☒ **Reply Tracking**
Track when a contact replies to your email [Automate](#) ⓘ
- ☒ **Google Analytics**
In-depth insight into various tracking metrics [Customize](#) ⓘ

[Done](#)

- 10) Click “Next” on the lower right of the window.

Preview of an email template showing a placeholder for a logo (%logo%) and a placeholder for a greeting (Hi %FIRSTNAME%). Below the preview are buttons for [Cancel](#), [Finish](#), and [Next](#). A yellow arrow points to the [Next](#) button.

- 11) Update your receiver and sender for your notification. You can also change the message in the notification during this step.

Subject line: * Automation Notice: 6-week post-settlement ch... 🤗 ⚡

Send to: [%BROKEREMAIL%](#) ✕
Enter up to 5 email addresses

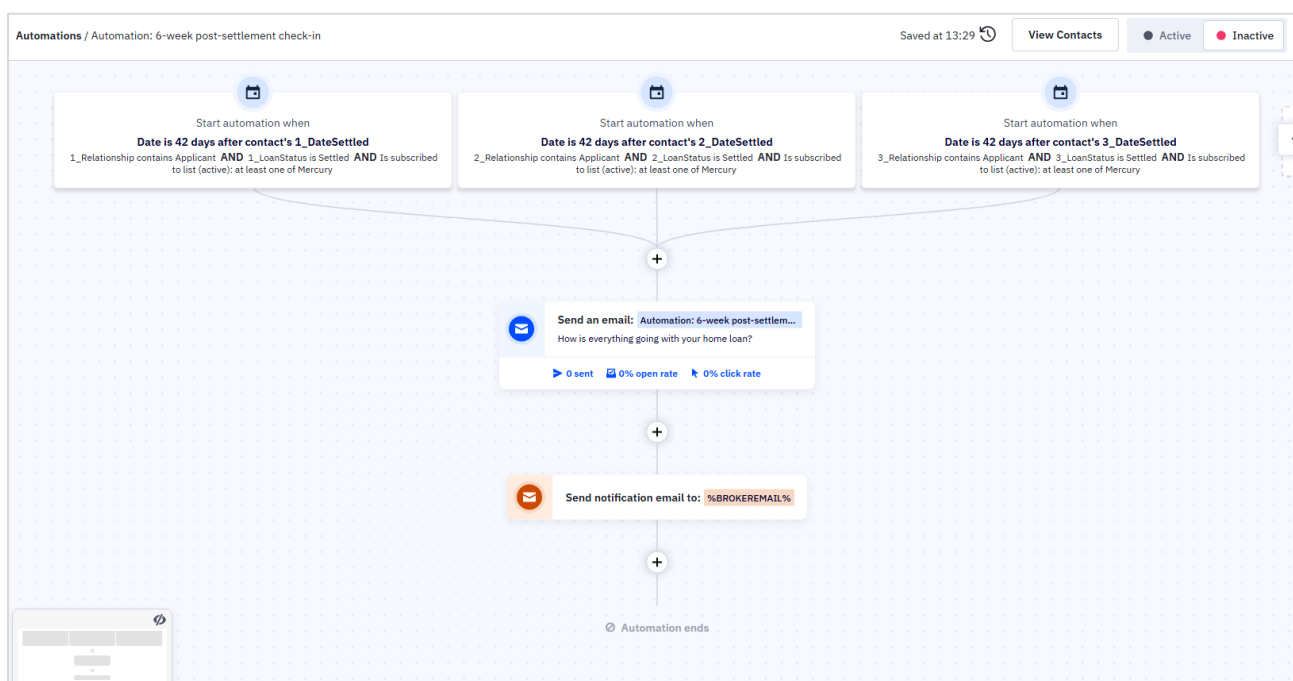
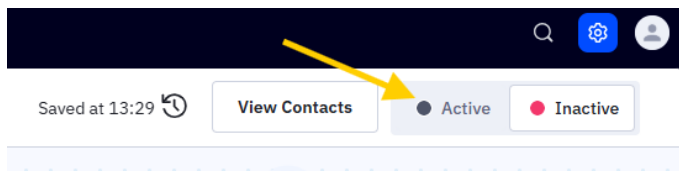
From: Broker Name - broker@connective.com.au [Edit](#)

Include: A link to the contact and contact's field values [Edit](#)

%FULLNAME% has entered the "6-week post-settlement check-in" automation and has been sent the "How is everything going with your home loan?" email.

12) Click “Done” on the lower right of the window.

13) The Automation is now Complete! Make sure to set it to “Active” in the top right corner when you are ready.



For more information, you can visit the [Digital Marketing Automation Hub – Automations](#) page on the Wiki or contact the Digital Marketing Hub team at marketinghub@connective.com.au.