Digital Marketing Hub

Automation: 6-week post-settlement check-in

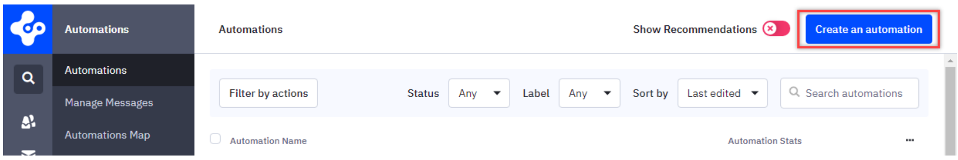
URL to import: https://tplshare.com/uKw7Hdb

Overview

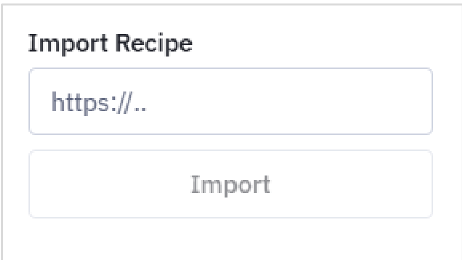
This automation allows you to send a check-in email 6 weeks after a client settled a loan, offering ongoing support for any loan-related inquiries. It also encourages the client to refer others who may need financial services.

Here is how to import the automation:

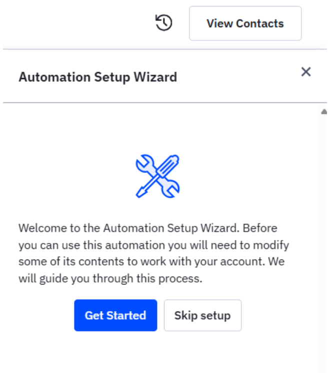
1) Navigate to the Automations tab of your account and select "Create an automation"



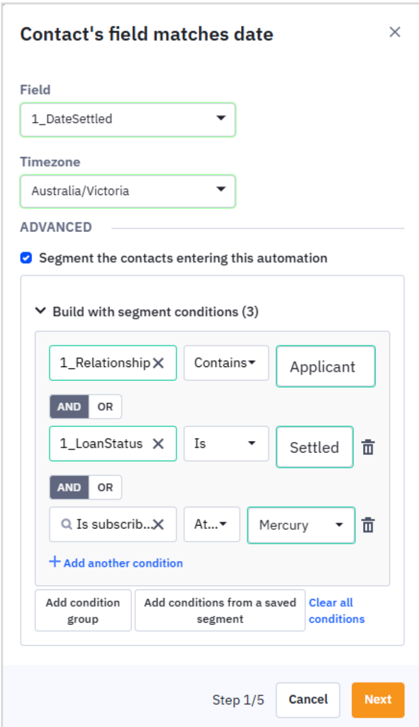
2) On the lower-left side of the page, locate the "Import Recipe field". Paste the shared automation URL https://tplshare.com/uKw7Hdb and click "Import"

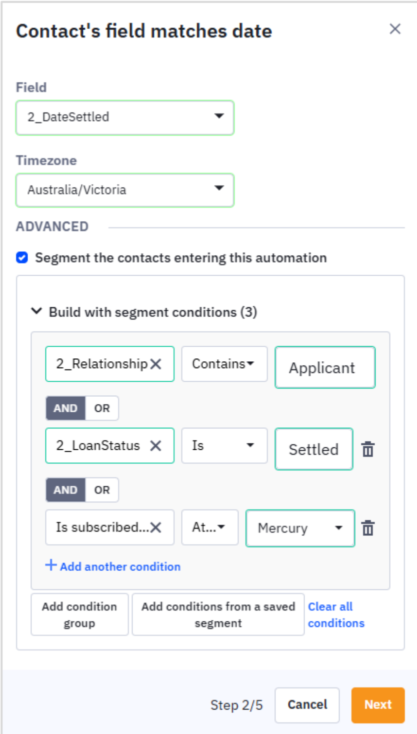


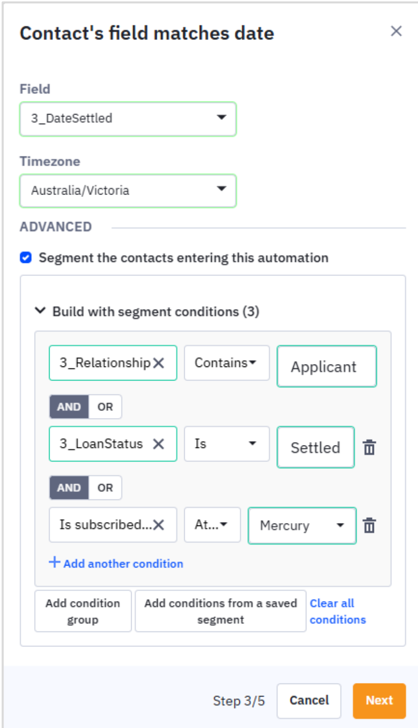
3) This will create the automation. On the right-hand side of the page, the "Automation Setup Wizard" will appear. Click "Get Started"



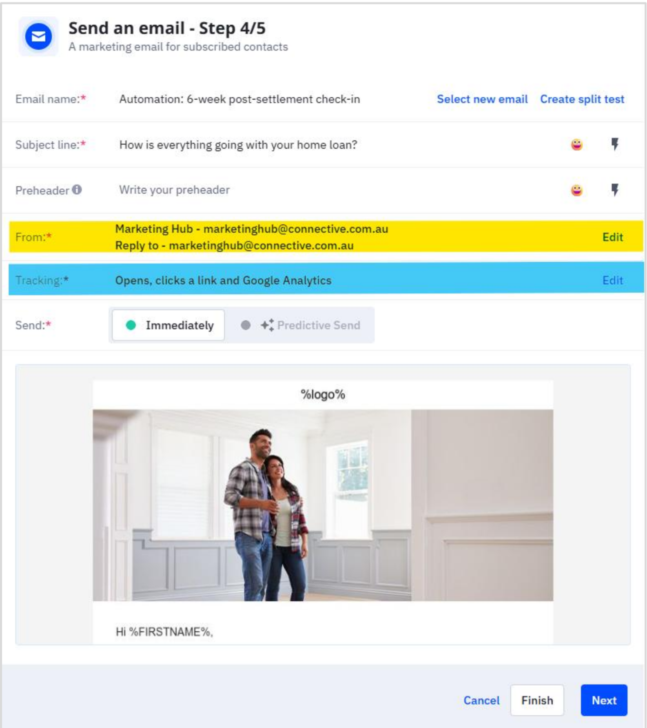
4) The wizard will guide you through mapping the trigger fields. Select the appropriate Settlement Date field, Timezone, Contact Relationship field, and Loan Status field, and active list subscription field. Complete the trigger setup for all three Opportunities.



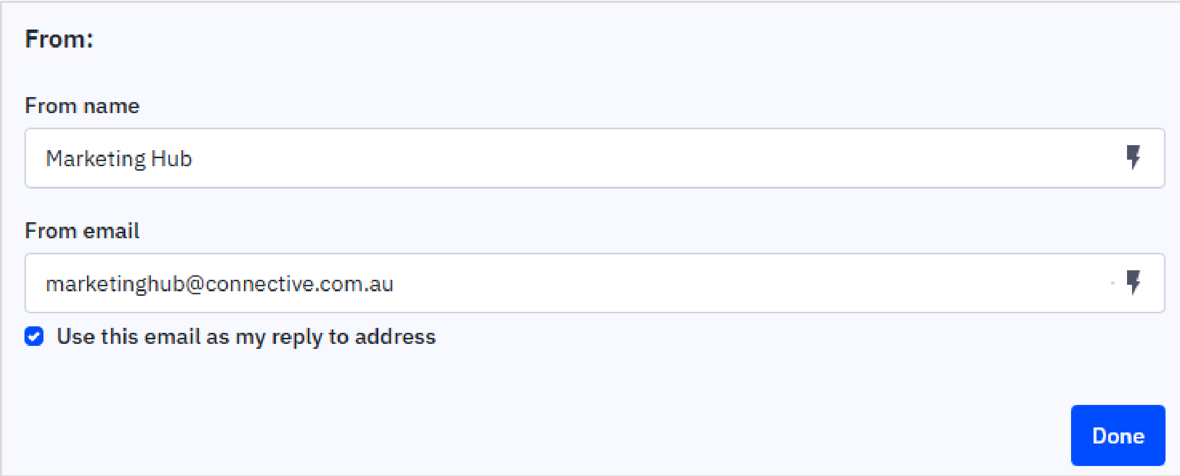




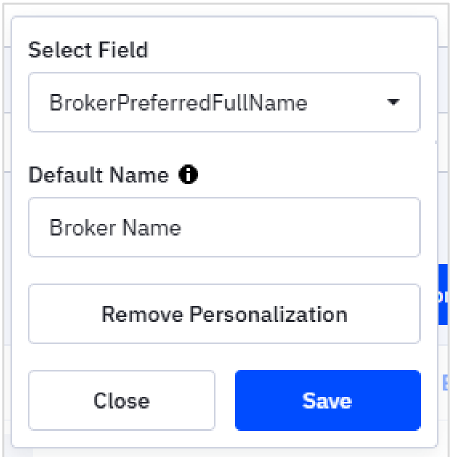
5) Next page will show the email in this automation.



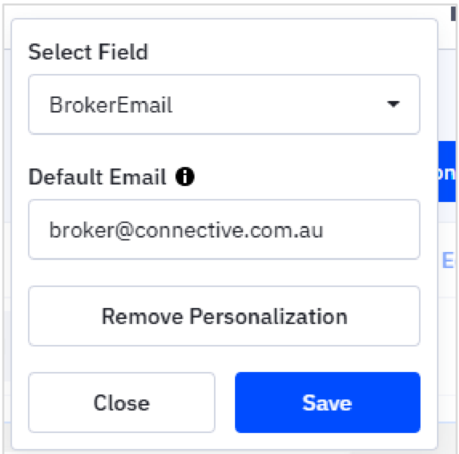
6) Click “Edit” on the right side of the “From” section of the email. (Highlighted yellow in the screenshot above)



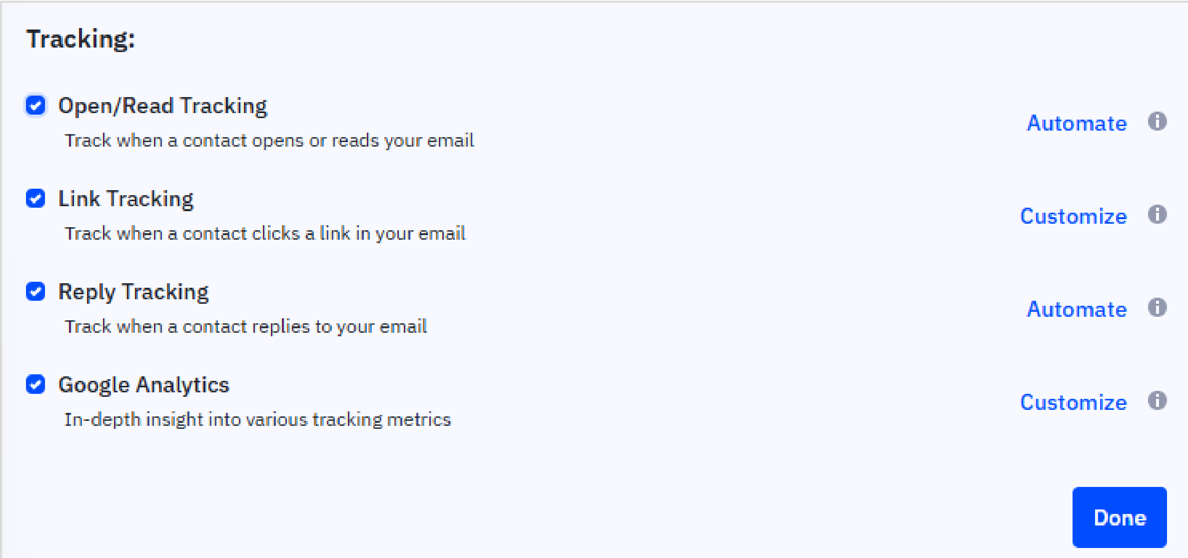
7) You need to personalise the email so that it appears from the relevant Relationship Manager’s name and email.
    a. Click the lightning bolt icon next to the “From Name” field.
    b. In the “Select Field” choose “Contact: BrokerPreferredFullName” so the Relationship Manager’s preferred full name appears as the email sender.
    c. Place the Default Relationship Manager’s full name in the “Default Name” field.
    d. Click Save.



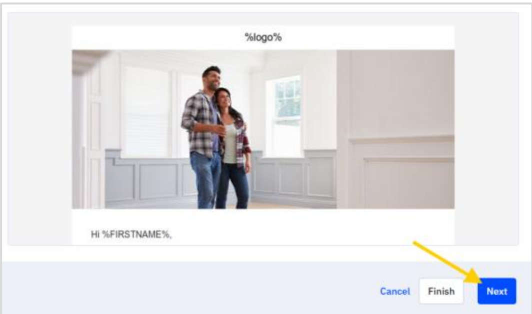
8) Complete the same process for the “From Email”
    a. “BrokerEmail” in the Select Field and
    b. the Default Relationship Manager’s Email in the Default Email Field.
    c. Click Save.
    d. Click Done.



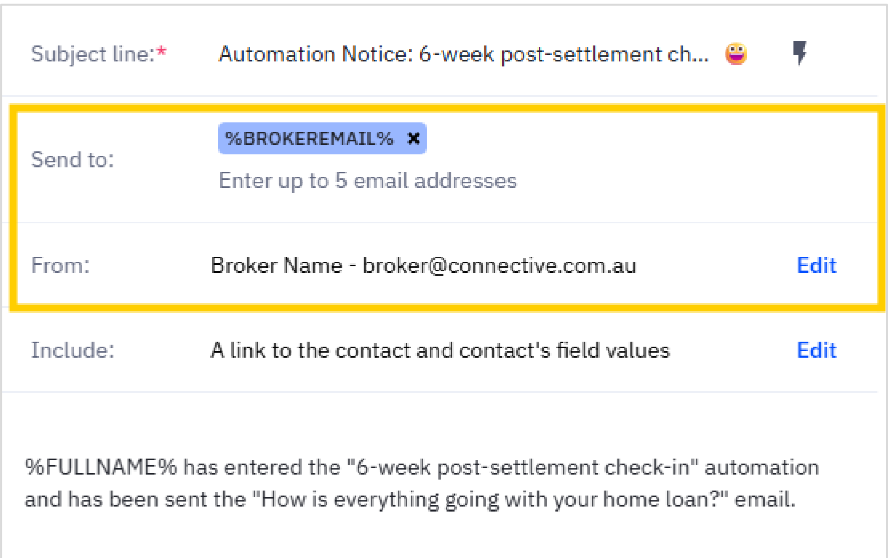
9) Click “Edit” on the right side of the Tracking options. (Highlighted blue in the previous screenshot) Make sure that everything is ticked. Then Click on “Done”.



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

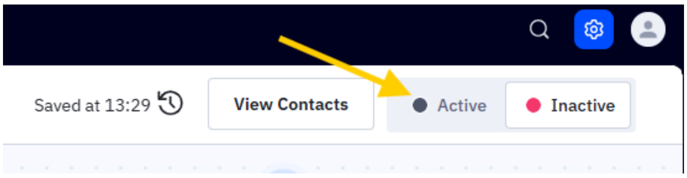


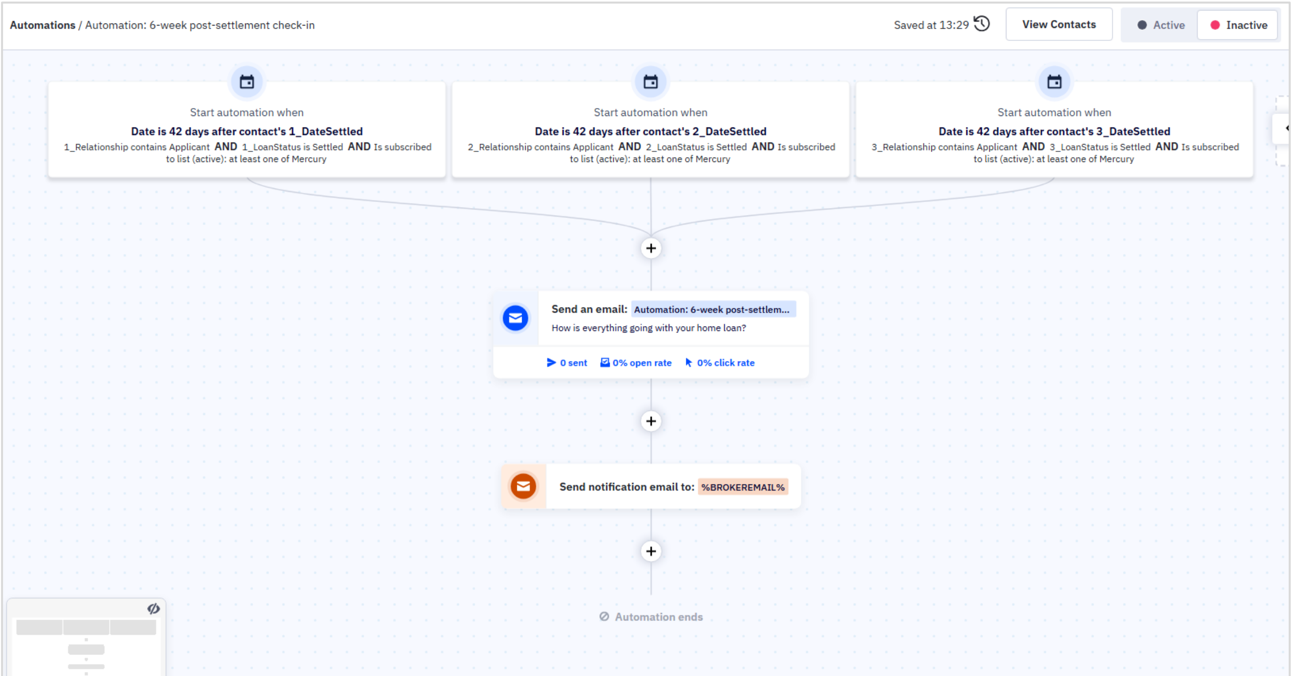
11) Update your receiver and sender for your notification. You can also change the message in the notification during this step.



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]().