



Flexing Journeys to Bring Custom Fields into Focused Views

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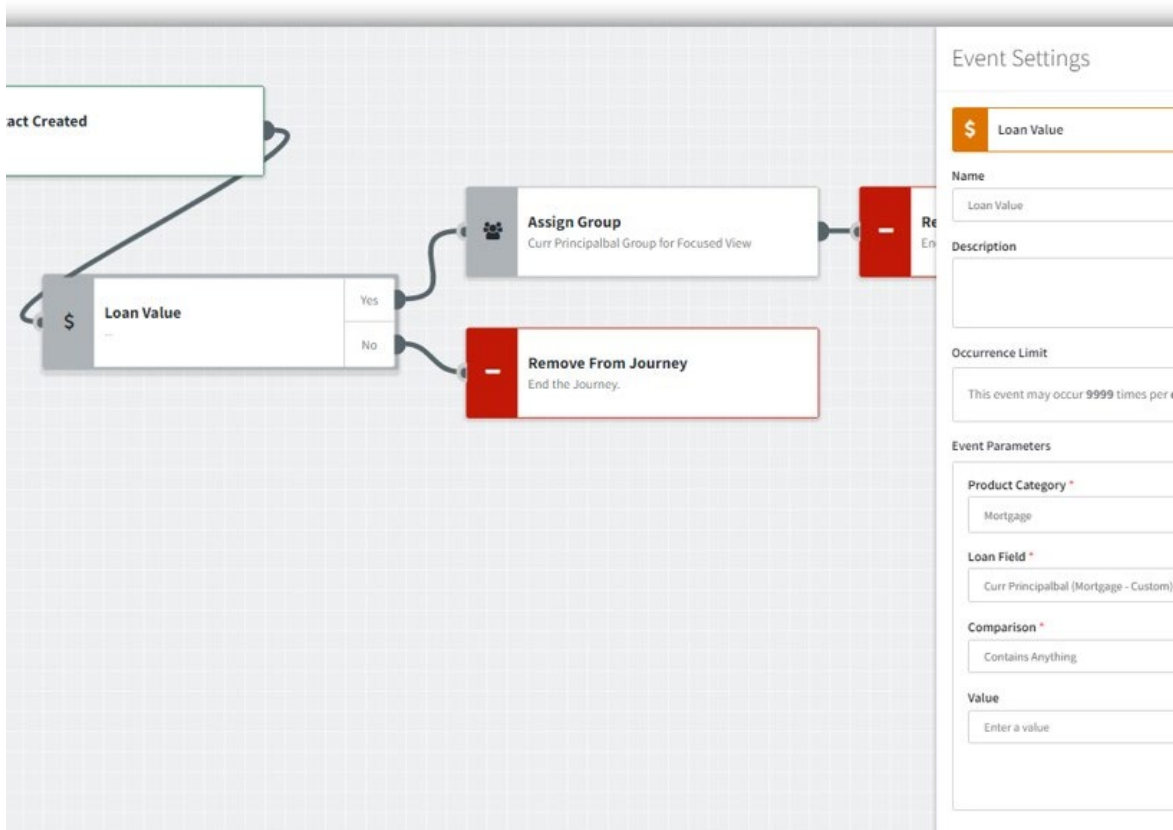
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Best Practices

Currently, custom fields cannot be used as inclusion/exclusion criteria within Focused Views. Some customers perform workarounds for this by leveraging Journeys, since Journeys will allow for the filtering of contacts based on both standard and custom fields.

Step 1: Creating the Journey

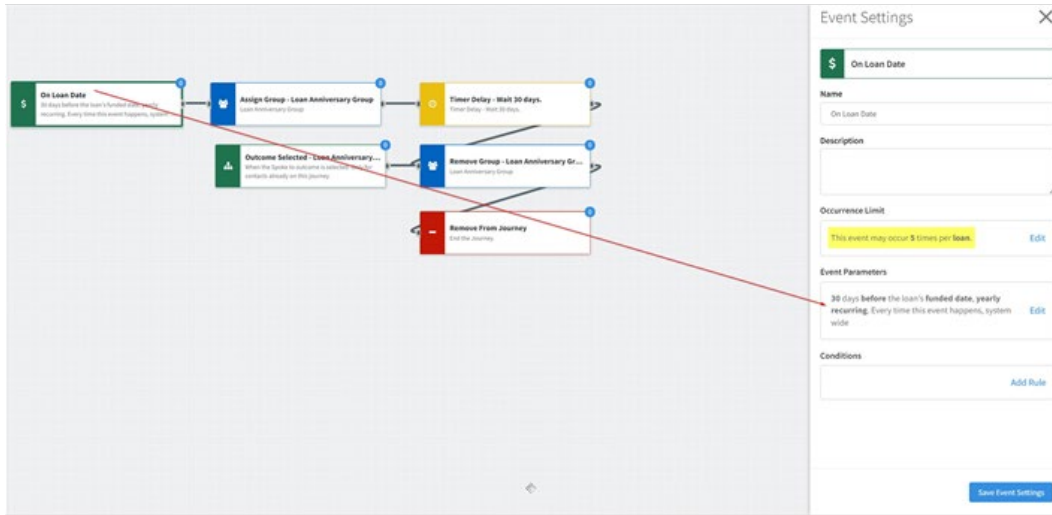
If you create a Journey with an inline condition to check for a value in a specific custom field, you could have those contacts placed into a group and then use that group name as the criteria within your Focused View.





Example Journey

This process could be used for creating a Loan Anniversary Focused View by creating a simple Journey with a recurring Loan Date trigger that is set for 30 days before the loan's funded date. Based on that trigger being met, the Journey will onboard contacts when their loan anniversary is 30 days out and place them into a loan anniversary group, which can then be used to build your Focused View. The yearly recurring trigger will allow contacts to be brought onto the journey continuously each year as they approach their loan anniversary.



Following the Group Assignment action, you would include a Timer Delay to wait for 30 days, followed by an Action to remove the contacts from that group after 30 days have passed, or if the user selects a specific Outcome that signifies they have reached out to the contact.

Tip

As a best practice, we recommend that you set an occurrence limit of 5 in the “On Loan Date” trigger, which will allow contacts to be picked up annually throughout the next 5 years.

Step 2: Building Your Focused View

After your Journey is set up, build your Focused View by selecting an inclusion rule with the group designated in your Journey.

