

# Changes to Transactions and Prospect Conversion

This release contains workflow and style changes to the Prospect Create Membership process, Transactions page, and Apply Adjustments page. While none of these are major changes, we know that staff members will need to be aware as the changes are noticeable and on frequently accessed pages. These changes will be available on **Wednesday, October 2nd**.

## ***In This Release***

### **Transactions now Responsive**

The transactions page is one of the most often accessed pages in Daxko Operations. Prior to this release, the page was not responsive, meaning sizing changes to the viewing window by the user or imposed by the device would cut off information on the page. By implementing responsiveness to this page, a user on a tablet or mobile device would more readily have access to the full page.

### **Apply Adjustments now Responsive**

With the above update to the transactions page, we have also updated the adjustments page to be responsive, as these pages pull in similar data and views.

*Also, we made one functional change:* users may no longer apply system credits from two places. By eliminating this capability from the adjustments page, users may now apply system credits through the make payment process. We are implementing this change to improve the training experience, as this previously caused confusion.

### **Prospect Conversion - New Workflow**

In order to provide a consistent experience for our associations, the prospect convert to membership experience now uses the same workflow as a new join. While this improves the training experience for staff, it also allows associations to capture agreements by using our updated add membership process.

Learn more about this release by accessing our [User Guide](#).

Need to know more? Email [support@daxko.com](mailto:support@daxko.com).

## ***Research***

### **Online Member Experience**

We are currently researching the online experience for your members, and also how we can allow more actions to take place online to maximize staff efficiency. We would love to hear from you! Please access our survey [HERE](#).