

Daxko Operations: Edit Pledge Schedule, Prospect Photos + More

With this Daxko Operations release, we are excited to announce an updated workflow for managing pledge schedules in our Fundraising module.

In addition to that, users now have the ability to capture photos on the prospect information page. Plus, we'll be making minor, "behind-the-scenes" technical updates to the SMS messages we send to aid online account access.

Be sure to read the full details below!

Fundraising Enhancements: Pledge Information & Pledge Schedules

We are excited to share a new look and feel to the way fundraising staff view and manage pledges in Daxko Operations. With this release, we have made improvements to the workflow and navigation across several pages related to viewing and editing pledges on a donor record, all with the purpose of making the most important information more visible and the most common tasks easier to do.

Old Pledge Information

beta

Test Client 3

Membership ▾

Programs ▾

Child Care ▾

Fundraising ▾

Finance ▾

Appointments ▾

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Caleb Tucker at [Set Branch](#)

[Membership Info](#) » [Donation History](#) » Pledge Information

Membership Unit: 1/19/2011 12:51:49 AM, Willow (32168)

Member	Willow 1/19/2011 12:51:49 AM	Date Pledge Made	3/6/2023
Campaign	Unsolicited	Campaigner	Unassigned
Section		Source	
Designation	NONE - NONE	General Ledger	(1-0110-01000-0900-0) Unsolicited Campaign
Memorial/Honorarium		Recognition	Willow 1/19/2011 12:51:49 AM
Addressee		Salutation	
General Sort		Comments	
Payment Method	Send Invoice to 5 5th ave 5 5th ave Birmingham, 35222 US AL Edit		Edit Pledge Info

Scheduled Date	Scheduled Amount	Amount Paid	Written Off	Balance Due	Payment Amount	Detail
Mar 07, 2023	\$100.00	\$0.00	\$0.00	\$100.00	\$ 0.00	-
Totals:	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	

[Back to Donation History](#)[Delete Pledge](#)[Edit Schedule](#)[Make Adjustment](#)[Make Payment](#)

□ New Pledge Information

beta

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[Membership Info](#) » [Donation History](#) » Pledge Information

Pledge Information

Overdue

Status Labels

1/19/2011 12:51:49 AM, Willow 32168-01

Unsolicited

Send Invoice to 5 5th ave 5 5th ave Birmingham, 35222 US AL

[See more](#) Consolidated Donation Details

Pledge Progress

\$100.00 / \$300.00

[Delete Pledge](#)

Payment Schedule

[Edit Schedule](#)

<input type="checkbox"/>	Scheduled Date	Pledge	Paid	Written-off	Due	Amount
<input checked="" type="checkbox"/>	03/06/2023	\$100.00	\$0.00	\$0.00	\$100.00	\$ 100.00
<input type="checkbox"/>	03/07/2023	\$100.00	\$100.00	\$0.00	\$0.00	\$
<input type="checkbox"/>	03/10/2023	\$100.00	\$0.00	\$0.00	\$100.00	\$
Totals		\$300.00	\$100.00	\$0.00	\$200.00	\$100.00

Write Off

Make Adjustment

Make Payment

Old Edit Pledge Schedule

beta

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New Edit Pledge Schedule

beta

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Caleb Tucker at [\(01\) Association Office](#) ▾

[Membership Info](#) » [Donation History](#) » [Pledge Information](#) » Edit Payment Schedule

Edit Payment Schedule

Edit Payments

Add Payments

Due Date	Scheduled	Paid	
Deleted 03/06/2023	\$100.00	\$0.00	↺
03/07/2023	\$100.00	\$100.00	
Edited 03/11/2023	\$100.00	\$0.00	✎ 🗑
Added 03/30/2023	\$25.00	\$0.00	✎ 🗑
Total	\$225.00	\$100.00	

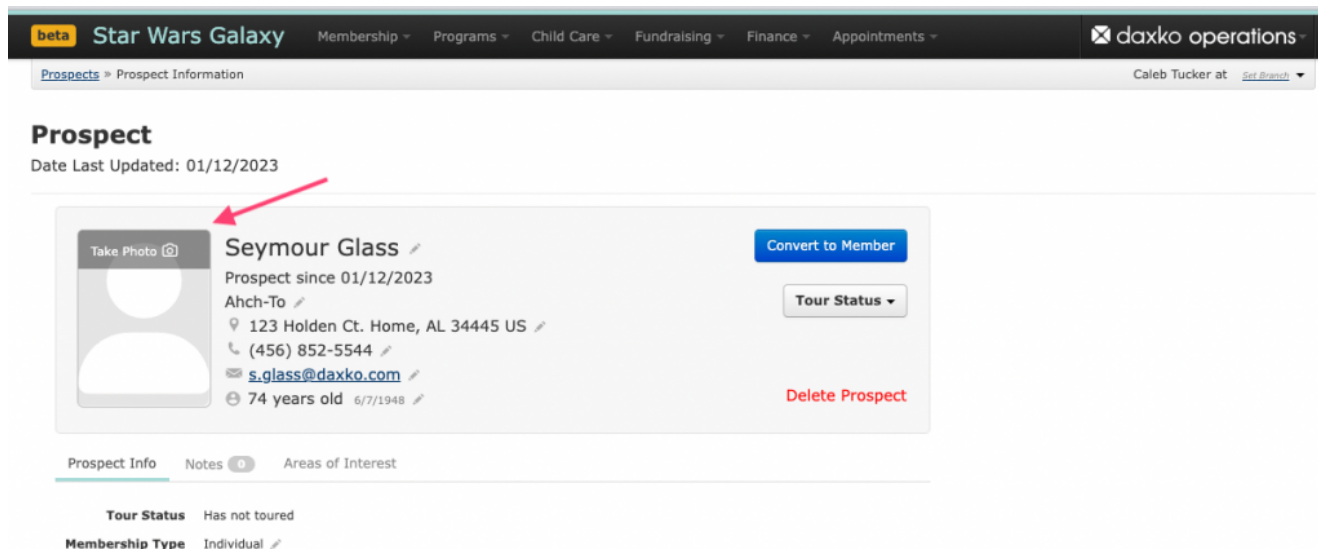
Cancel

Save

This release will be available to all customers in Live Sites on **March 15th, 2023**. To learn more, check out the [user guide here](#).

📷 Say “Cheese!” Adding Photos for Prospects

When it comes to engaging with your prospects, not only do you need basic contact information, details about prospects’ interests and what membership they’re exploring – you also sometimes need to put a face with a name.



With this release, users can now add photos to prospect profiles. We’re happy to provide this functionality to help you grow your community! This feature will be available for all organizations in Live Sites on **March 15, 2023**. Check out the [user guide here](#).

Updates to SMS Notifications

In Daxko Operations, we send SMS texts (and optional voice calls) to deliver **temporary login codes** for members accessing their online account. We will be updating the technology we use to send these messages. While we anticipate no changes to functionality, throughout this process users and members may notice that the login code text messages will be delivered by a different phone number than was used previously. If you have any questions or concerns about this minor update, please don’t hesitate to contact us at support@daxko.com.