# Daxko Operations Release: Design and Usability Updates + More

With this release, we're excited to introduce an updated design to a few commonly used pages and reports, the first in a series of releases focused on improving the overall usability and consistency of Daxko Operations. Read below for more details around that.

In addition to these design upgrades, this release also includes a handful of other new features and enhancements:

- Block Online Access for Members
- Event Log Entries for Trial Memberships
- New Partnerships Page for Integrations
- Daxko Scheduling: Appointment Manager Updates

# **Design & Usability Updates - Our New DNA**

Ease of use is essential for Daxko Operations — now more than ever, as associations have been operating with smaller teams or are onboarding new users who aren't familiar with the system. Your teams need software tools that are intuitive, easy to use, and faster to learn so that you can focus on serving your community.

In support of enhancing usability, we will be making a series of design upgrades across Daxko Operations. With this, we're establishing new, consistent patterns throughout the system, as well as redesigning pages to improve usability and functionality, improvements all driven by data and research. We're excited to introduce 3 of those updated pages in this release.

- Transactions
- Membership History
- Account Balance

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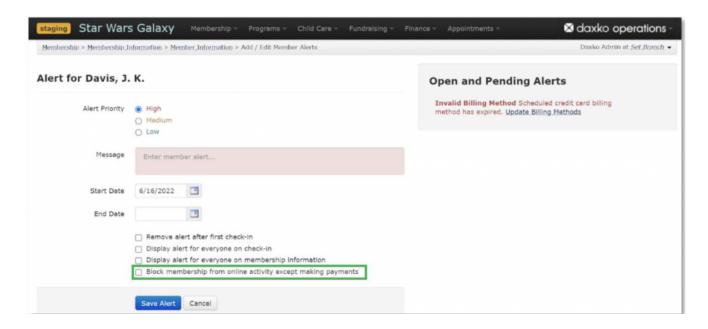
Read more about these <u>updates here</u>.

Also, in case you missed it: Last week, we hosted a **Project Thrive Ask the Expert session** about the design upgrades our team has been working on. <u>Check</u> <u>that out here</u>.

## **Other Features and Enhancements**

### **Block Online Access for Members**

In some circumstances, associations may need to prevent members for accessing their online account. For example, if a member has an outstanding balances, associations may wish to block him or her from registering for a program or taking some other actions online. With this new feature, users with appropriate permissions can place a high-level alert on a member's record and block all online actions except for paying a balance.



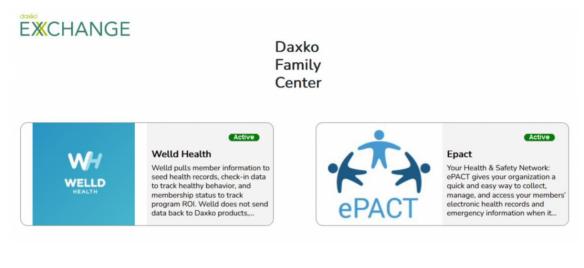
Review the <u>user guide here</u> for more details about how this works.

### **Event Log Entries for Trial Memberships**

Trial Memberships are a great way for associations to allow prospective members to try out a branch for a specified number of days. With this release, we have added event log entries to help associations keep track of when Trial Memberships have been enabled or disabled for a branch, as well as if the trial period has been updated.

#### **New Partnerships Page**

Did you know Daxko has a partner network of best-in-breed providers? Check out the <u>Daxko Exchange</u> for more details. With this release, we've added a new item in the System Menu, which allows Administrators to view which partners their association has approved to interact with Daxko Operations as well as the types of data the partner has access to and when their data was last accessed.



Review the full <u>user guide here</u>.

#### **Daxko Scheduling: Appointment Manager Updates**

We know that associations are tracking orientations as part of their membership metrics. Now, associations using Daxko Scheduling now have a simpler way to view the total number of open and completed appointments at a glance, as well as a way to export appointment details for selected range of time.

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