

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
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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

Name	Phone	Email
John Doe	555-555-5555	john.doe@example.com
Jane Smith	555-555-5556	jane.smith@example.com
Bob Johnson	555-555-5557	bob.johnson@example.com
Alice Brown	555-555-5558	alice.brown@example.com

Name	Phone	Email
John Doe	555-555-5555	john.doe@example.com
Jane Smith	555-555-5556	jane.smith@example.com
Bob Johnson	555-555-5557	bob.johnson@example.com
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Read more about these [updates here](#).

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. [Check that out here](#).

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.

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Membership » Membership Information » Member Information » Add / Edit Member Alerts Daxko Admin at Set Branch

Alert for Davis, J. K.

Alert Priority ☒ High ☐ Medium ☐ Low

Message

Start Date

End Date

☐ Remove alert after first check-in
☐ Display alert for everyone on check-in
☐ Display alert for everyone on membership information
☒ Block membership from online activity except making payments

Open and Pending Alerts
Invalid Billing Method Scheduled credit card billing method has expired. Update Billing Methods


Review the [user guide here](#) 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 [Daxko Exchange](#) 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.



WellD Health

WellD pulls member information to seed health records, check-in data to track healthy behavior, and membership status to track program ROI. WellD does not send data back to Daxko products,...

Active



Epact

Your Health & Safety Network: ePACT gives your organization a quick and easy way to collect, manage, and access your members' electronic health records and emergency information when it...

Active

Review the full [user guide here](#).

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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Appointments Manager Caleb Tucker at (31) Ahch-To

Appointments Manager

Date Custom

Custom Range 06/01/2021 12/13/2021

Type All

Branch All

Sites All

Assigned Staff All

Search Export

Open Completed

Total 5 records

Date and Time ^	Membership Name	Member Name	Appointment Name	Assign	Complete
7/15/2021 10:00 AM - 11:00 AM	sirr, maria	sirr, maria	Jump Start	Assign	Complete
7/22/2021 10:00 AM - 11:00 AM	demo, demo	demo, demo	Jump Start	Assign	Complete