

New Prospecting Features: Create Forms + More (Training Site Release)

As our customers begin reopening efforts and plan for welcoming their community back, we are excited to release new functionality and other updates to member prospecting in Daxko Operations! These features will be available **Wednesday, May 20**, on your **Daxko Operations Training Site**. We encourage you and your team to begin familiarizing yourself with these new features before the release to the Live Site in **June**.

This release includes the following:

- New **Prospect Forms** for Websites and Lead Capture
- Updated **Add Prospect** Experience
- Enhanced **Prospect Profile**
- New **View Prospects** Page
- Read the [User Guide](#) for all the details

New! Creating and Managing Prospecting Forms

With this release, users have the ability to create simple forms to collect prospecting leads directly into Daxko Operations. This allows people to submit their own lead or interest form, saving valuable staff time.

YMC of South Hampton Roads
 Membership Programs Child Care Fundraising Finance
 daxko operations

System Options Manage Forms Create New Form

Alankrit Bamrara at [Set Branch](#)

Create New Form

Details

Name *

Branch *

-- Select --

Type *

-- Select --

Configuration

* Required

First Name *

Last Name *

Email *

Phone *

Add Additional Field

+ Add Additional Field

Form styling and details

Theme

No Logo

Welcome Message:


Welcome to our community!

Confirmation Message:

Thank you! We will be in touch soon.

Cancel

Save Changes



Greetings! Tell us about yourself...

Contact Information

First Name *

Last Name *

Email *

Phone *

Gender

Branch of Interest *

Save

Another new feature for Prospecting in Daxko Operations is the View Prospects

Page. This is where users can see a list prospects who have been entered, whether manually through Add Prospects or through prospect forms. Select a prospect's name to view his or her profile.

The screenshot shows the 'Prospects' page. At the top, there's a navigation bar with 'leia YMCAs of South Hampton Roads' and various menu items like 'Membership', 'Programs', 'Child Care', 'Fundraising', and 'Finance'. A user profile for 'Alankrit Bamrara' is visible. Below the navigation bar, the page title is 'Prospects > View Prospects'. The main section is titled 'Prospects' and contains filters for 'Branch' (set to '(72) Albemarle Family YMCA'), 'Tour Status' (set to 'Select Status'), and 'Date Added' (range from 04/16/2020 to 05/16/2020). There are buttons for 'Add New Prospect' and 'Export'. Below the filters is a table with columns: Name, Source, Branch, Tour Status, Date Added, and Date Last Updated. The table lists two prospects: 'Bazo, Erika' and 'Theall, Eric'.

Name	Source	Branch	Tour Status	Date Added	Date Last Updated
Bazo, Erika	Tour	Albemarle Family YMCA	Has not toured	05/14/2020	05/14/2020
Theall, Eric	Tour	Albemarle Family YMCA	Toured - didn't join	04/30/2020	04/30/2020

Viewing the Prospect Profile

We have revamped the Prospect Profile, making it look a little more like a Member Profile. The Prospect Profile displays any information you have about that person and provides a way to quickly update with any new information or add notes as your relationship with them deepens.

The screenshot shows the 'Prospect' profile for 'Chuck Peters'. The page title is 'Prospect > Prospect Information'. A red box highlights the 'Date Last Updated: 05/15/2020' text. The profile card shows a placeholder image with 'CP', the name 'Chuck Peters', and details: 'Prospect since 05/15/2020', 'Albemarle Family YMCA', 'Add Address', '(555) 555-5555', and 'cpeters@daxko.com'. There is a 'Convert to Member' button and a 'Tour Status' dropdown menu. The dropdown menu is open, showing options: 'Has not toured', 'Toured - didn't join', 'Scheduled', and 'Did not show'. Below the profile card, there are tabs for 'Prospect Info' and 'Notes'. At the bottom, the 'Tour Status' is 'Has not toured' and the 'Membership Type' is 'Married Couple'.

To read the full details of this release, check out this week's Training Site [User Guide](#).

We need your feedback regarding these enhancements to Prospecting prior to our release of this functionality in June to your Live Site. You may send your feedback to Charlie Peters, Associate Product Manager, to cpeters@daxko.com.