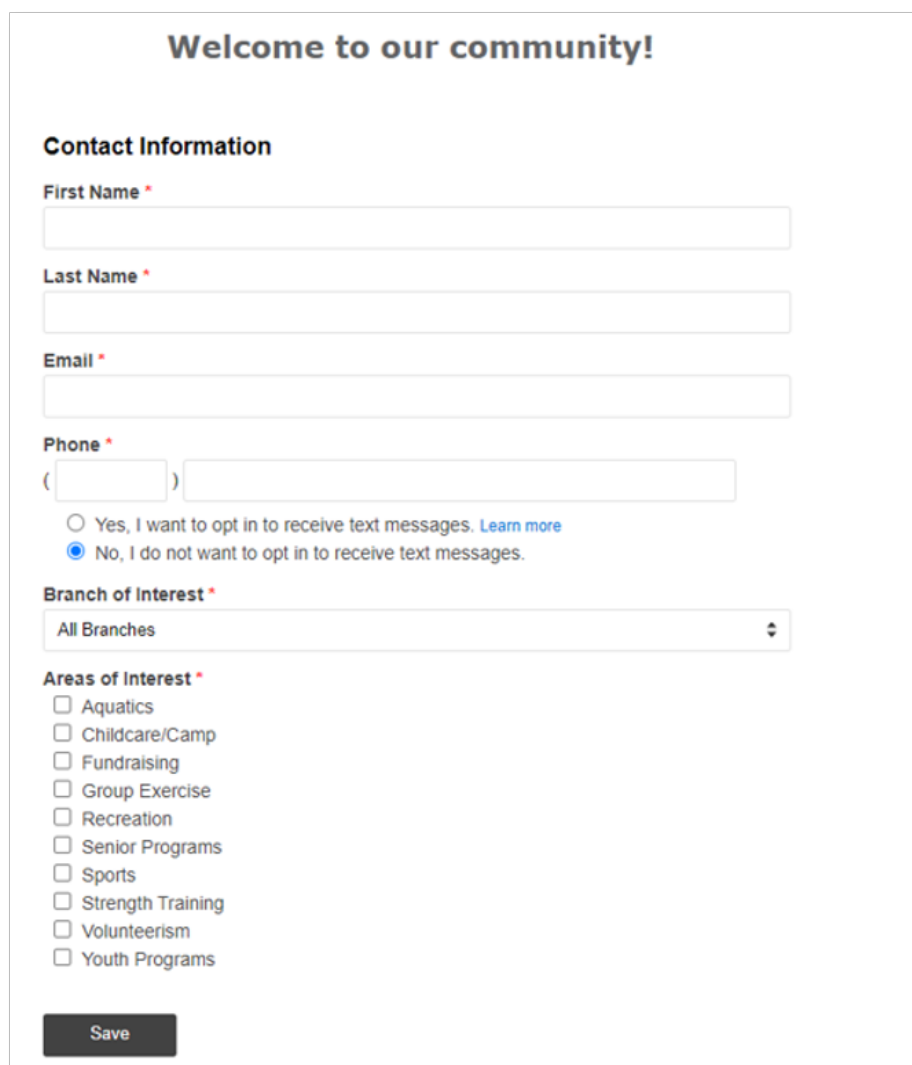


# Daxko Operations: Prospecting Enhancements

This Daxko Operations release includes a few exciting enhancements to prospecting, including better ways to capture prospect interests and new prospect conversion metrics.

## Prospecting Enhancements

Knowing what prospective members are interested in can be a helpful way to follow up with them. Now, users can collect **prospect interests** through prospect forms.



The screenshot shows a web form for prospecting. At the top, it says "Welcome to our community!". Below this is a section titled "Contact Information" with fields for "First Name \*", "Last Name \*", "Email \*", and "Phone \*". The phone field is split into a country code dropdown and a main number field. Below the phone field are two radio buttons for opting in to receive text messages: "Yes, I want to opt in to receive text messages. [Learn more](#)" and "No, I do not want to opt in to receive text messages." (which is selected). Below this is a "Branch of Interest \*" dropdown menu currently set to "All Branches". At the bottom is an "Areas of Interest \*" section with a list of checkboxes: Aquatics, Childcare/Camp, Fundraising, Group Exercise, Recreation, Senior Programs, Sports, Strength Training, Volunteerism, and Youth Programs. A "Save" button is at the bottom left.

**Welcome to our community!**

**Contact Information**

First Name \*

Last Name \*

Email \*

Phone \*

( )

☐ Yes, I want to opt in to receive text messages. [Learn more](#)

☒ No, I do not want to opt in to receive text messages.

**Branch of Interest \***

All Branches

**Areas of Interest \***

☐ Aquatics

☐ Childcare/Camp

☐ Fundraising

☐ Group Exercise

☐ Recreation

☐ Senior Programs

☐ Sports

☐ Strength Training

☐ Volunteerism

☐ Youth Programs

Save

In addition, staff users can now track **prospect conversion metrics** over a selected time period. To find the report, navigate to the System Menu > Browse

Reports > Prospect Conversion.

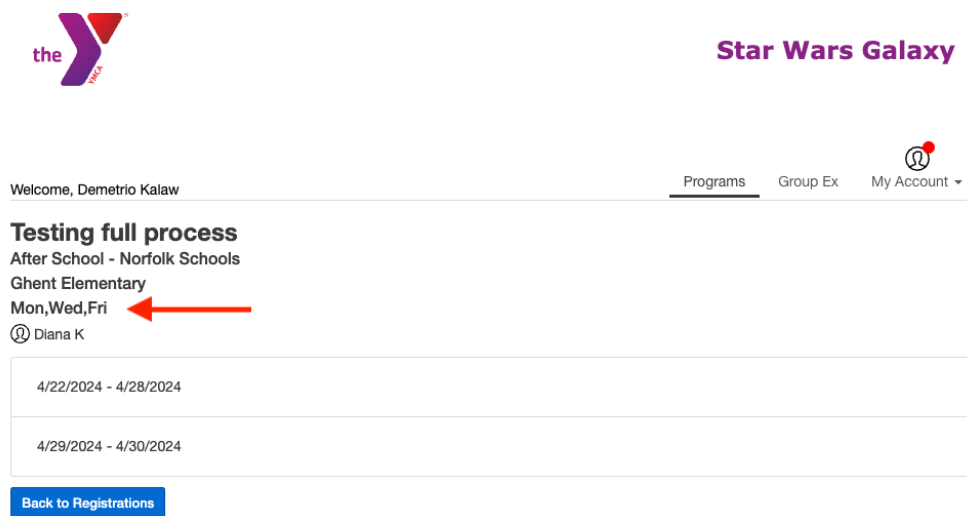
Check out the [full user guide here](#) for more details about these prospecting updates.

## Other Items

In addition to some maintenance items, this release also includes an update to the way childcare program registration days display in a member's online account and no longer requiring a campaigner when assigning gifts from 'Manage Online Donations'.

- Display days of childcare programs online

Now parents can see the days their child will attend the program when viewing the registration details online. To view the childcare registration details, navigate to My Account > Registrations > select 'View Details'.



The screenshot shows the Y logo on the left and the "Star Wars Galaxy" program title on the right. Below the title, the user is logged in as "Demetrio Kalaw". The navigation bar includes "Programs", "Group Ex", and "My Account". The main content area displays the program details: "Testing full process", "After School - Norfolk Schools", "Ghent Elementary", and "Mon, Wed, Fri". A red arrow points to the "Mon, Wed, Fri" text. Below this, there are two rows of dates: "4/22/2024 - 4/28/2024" and "4/29/2024 - 4/30/2024". At the bottom, there is a blue button labeled "Back to Registrations".

| Program               | Days          |
|-----------------------|---------------|
| Testing full process  | Mon, Wed, Fri |
| 4/22/2024 - 4/28/2024 |               |
| 4/29/2024 - 4/30/2024 |               |

- New *optional* "Campaigner" selection from Manage Online Donations

The screenshot shows the Daxko Operations interface for managing online donations. A modal window is open for assigning a campaign to a specific pledge. The modal has three dropdown menus: 'Campaign Branch' (set to 'Select a branch'), 'Campaign' (set to 'No campaign for the branch'), and 'Campaigner (Optional)' (set to 'No campaigner'). The 'Campaigner (Optional)' label is highlighted with a red rectangle. At the bottom of the modal are 'Cancel' and 'Assign' buttons. In the background, a table lists donors: Buddy Yeet, Devi User1, and Devin Williams. Devin Williams has a pledge of \$500.00 on 3/17/2022. To the right, an 'Assignment Status' section shows '1 pledge', '2 pledges', and '1 of 1 unassigned pledge'.

The above features and enhancements will be available in Live sites for all associations on **October 26, 2022**. Please contact [support@daxko.com](mailto:support@daxko.com) if you have any questions or concerns.

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## Join Us for a 2022 Release Review

Fallen behind on last quarter's Daxko releases? Join members of our Professional Services team on **October 26, 2022 at 1:00 pm CST** to review Daxko Operations, Daxko Engage, and Daxko Accounting enhancements made during the 3rd Quarter of 2022 (July, August, and September). [Register here](#).