



SKEEHAN & YOUNG, CPA INC.

Daxko Operations

Comprehensive Training Guide

Complete module-by-module reference for Childcare, Membership, Finance, Fundraising, and Program operations.

Outsourced accounting & financial strategy for mission-driven nonprofits.

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CHILDCARE MODULE

Complete guide to managing youth programs, registrations, attendance, and third-party billing

Part 1: The Absolute Basics

What Daxko Childcare Operations Actually Does

Daxko Operations is the software your organization uses to manage all things childcare:

- Registering kids for programs
- Managing waitlists
- Processing payments (including complicated stuff like third-party subsidies)
- Tracking attendance
- Creating tax statements for parents

Think of it as the digital command center for your childcare empire.

The Five Questions Every New Childcare Person Asks

1. "How do I register a child for a program?" → Part 2
2. "What do I do when a program is full?" → Part 3 (Waitlist management)
3. "How do I deal with subsidized childcare?" → Part 4 (Third-party billing)
4. "How do I track which kids are actually here today?" → Part 5 (Attendance)
5. "How do I not mess everything up?" → Addressed throughout

Part 2: Setting Up and Running Childcare Programs

Step 1: Creating Rate Plans (The Foundation of Everything)

1. Navigate to Child Care > Settings > Rate Plans
2. Click Add Rate Plan
3. Choose Child Care option
4. Select the Frequency:
 - Daily: Charged per day registered (good for drop-ins)
 - Weekly: Charged per week (most common for after-school care)
 - Monthly: Charged per month (common for ongoing programs)
 - Flat: One-time charge for the whole period
5. Enter a Rate Plan Name that makes sense (e.g., "After School: 3 days/wk")
6. Select your Branch (who's responsible for this rate plan)
7. Choose your Category (what type of care this is)
8. Set your Rate Availability time period (IMPORTANT: Make this cover from program setup through end date)
9. For Weekly/Bi-Weekly/Monthly plans, select number of days per week and specific days offered
10. Select when care is provided: Before school, After school, Both, or All day

11. Check the boxes next to the Registration Groups that can register
12. Enter the Dollar amounts each group will pay
13. Select when the fee is due
14. Optionally, add Rate Exceptions (for holidays) or Availability Exceptions
15. Click Save rate plan

PRO TIP: Create a rate plan for EACH pricing option you offer. If you offer 3-day and 5-day options, those are two separate rate plans.

PRO TIP: For partial-day programs (before/after school), make sure to set 'Care Provided' correctly, or your waitlist functionality won't work properly.

Step 2: Creating Programs

Navigate to Child Care > Programs > Add Child Care Program and fill in each tab:

Program Information Tab:

- Select Branch, Category, Program Name
- Enter Program Dates (start and end of the whole program)
- Select Care Provided (Partial Day or All Day)
- Write a Description (this shows online!)
- Optional: Add notification emails to receive alerts when someone registers online

Registration Tab:

- Set registration options (in-house and/or online)
- Choose whether to use different dates for each registration group
- Optional: Add a registration fee
- Enable Tax Statements (usually Yes)
- Set Eligibility Rules (age restrictions, gender requirements)

Location Tab:

- Check the locations offering this program
- Enter contact information for each location
- Set enrollment numbers (Min, Max, Goal)
- Select waitlist options (Not Allowed, Allowed-Show Count, Allowed-Hide Count)

Rates Tab:

- Click Select rate plans to view available options
- Check boxes next to the rate plans for this program
- Click Add rate plans
- Arrange the order they'll appear during registration

Publish Tab:

- Review everything and click Publish when ready

⚠ WARNING: Once you publish, the program is LIVE! Make sure everything is correct before hitting that button.

Editing Rate Plans and Programs

To edit Rate Plans: Child Care > Settings > Rate Plans > click the edit pencil

To edit Programs: Child Care > Browse Programs > find your program > click the edit pencil

⚠ WARNING: Changes only affect FUTURE registrations, not existing ones!

Part 3: Registration and Waitlist Management

Registering a Child for a Program (In-house)

1. Search for the child through Membership > Members > Search
2. Select the child from search results
3. Click Actions > Register for Programs
4. Select the appropriate Tag
5. Select the program to register for
6. Click Register
7. Complete all screen prompts
8. Review registration data
9. Click Register to complete
10. Go to Account Balance screen to collect payment

PRO TIP: If you get an error about eligibility requirements, you might need to override restrictions (if you have permission).

Managing the Waitlist

Setting Up a Waitlist:

During program setup on the Location tab, select one of these waitlist options:

- Not Allowed: Enforces the maximum number and cuts off further registration
- Allowed - Show Count: Shows staff and parents their position in line
- Allowed - Hide Count: Shows there's a waitlist but not their position

Viewing and Managing the Waitlist:

1. Child Care > Manage Programs
2. Select the Program Name
3. Click on Roster or Roster for All
4. In the top right corner, click View Waiting List
5. From here you can: Add registrant to roster or Delete from waitlist

IMPORTANT: When someone is added to the roster from the waitlist: Fees will now be due on their profile, you may need to collect payment info, and YOU must notify them they've been added (no automatic notification).

Making Changes After Registration

Changing Days, Rate Plans, or Locations:

1. Go to child's member unit
2. Select the child and click the Child Care tab
3. Under Registrations, click the one you need to change
4. Select Modify Instances

5. Choose: Change days, Change rate plan, or Change location
6. Follow the steps to complete the change

Note: You can only make changes within the SAME program. To move to a different program, you must cancel and re-register.

Canceling Registrations:

1. Go to child's member unit
2. Select the child and click the Child Care tab
3. Find the registration to cancel
4. Check the box next to instance(s) to cancel
5. Click Cancel
6. Review cancellation details
7. Choose whether to leave them in the roster (usually no)
8. Click Cancel Now
9. If payments were made, process any refunds

Part 4: Payment Processing and Third-Party Billing

Setting Up Third-Party Subsidies

Creating a Third-Party Contract for a Child:

1. Go to the child's profile
2. Click Member Actions > Edit Member Information > Child Care Profile
3. Select Add a third party subsidy
4. Complete the contract information:
 - Organization providing the subsidy
 - Provider/Location allowed for care
 - Start/End dates for the contract
 - Parent co-pay amount
 - Org. full day pay amount
 - Org. part day pay amount
 - Contract Number and other details
5. Click Save

Note: These amounts are daily rates, even if the original contract uses different periods. Convert as needed!

Applying Subsidies to Registrations:

1. Navigate to the child's Account Balance page
2. Select the fees to be subsidized
3. Click Subsidize Registration
4. Enter the subsidy amount
5. Click Apply then Save Changes

PRO TIP: You'll need to do this for EACH child and EACH eligible registration.

Managing Organization Payments

Viewing Organization Balances:

1. Go to Membership > Organization > Organization Info
2. Find the organization and click the Balance Due link
3. Toggle to Child Care/Camp Fees
4. Click View

Recording Payments from Organizations:

1. From the organization's balance screen, select Record Payments
2. Enter the amount received and service period dates
3. Click Continue
4. Apply the payment to specific children's balances
5. Click Make Payment

IMPORTANT: If an organization sends more than the amount due, you have two options: Apply the full amount (overpayment goes to the member) or Apply a partial payment (remainder stays with the organization).

Creating Invoices for Organizations:

1. From the organization's balance screen, select Create Invoice
2. Enter the service period dates
3. Click Continue
4. Review children on the invoice
5. Click Save Invoice and then Print Invoice

Part 5: Attendance Tracking

Using the Attendance Tracker

Checking Children In/Out:

1. Navigate to Membership > Members > Child Watch Check-in
2. Search for the child
3. Select the child and click Check In
4. For check-out, find the child in the "Checked In" tab and click Check Out

Marking Absences:

1. In the Attendance Tracker, locate the child
2. Click the Mark Absent button
3. Select the absence period (AM, PM, or both for partial day programs)
4. Optionally enter an absence reason
5. Click Confirm

PRO TIP: You can reverse an absence by clicking on the "Absent" marker and selecting Reverse Absence, or by checking in the child.

Filtering and Reporting Attendance:

1. Use the Status filter to view specific groups (Absent, Expected, etc.)
2. For attendance reports, go to Child Care > Attendance > Dashboard > Export

3. Select Attendance and Absence report

Managing Child Profiles

Setting Up the Child Profile Questionnaire:

1. Navigate to Child Care > Settings > Child Profile
2. Add sections by clicking + Add Section
3. Name each section and add instructions
4. Add questions by clicking + Add Question in each section
5. Select question types (Checkboxes, Date, Dropdown, etc.)
6. Set whether questions are required during registration
7. Click Publish when ready

Part 6: Tax Statements and Reporting

Generating Child Care Tax Statements

Mass Printing Tax Statements:

1. Navigate to Child Care > Statements > Tax Statements
2. Click Print for PDF statements or Download for Excel format
3. Select branch (if multi-branch)
4. Click Submit
5. PDFs will be available to print or Excel file to download

Printing Individual Tax Statements:

1. Go to the child's account
2. Click Child Care tab > Child Care button
3. Under Quick Links, click Tax Statement
4. Select Print for PDF or Download for Excel

Running Reports for Child Care

Custom Reports:

1. Navigate to System Menu > Custom Reports > Child Care and Camp Reports
2. Select the report you need
3. Set parameters (date range, locations, etc.)
4. Run the report

Subsidy Summary Report:

1. Navigate to Finance > Reports > Subsidy Summary
2. Select the organization
3. Choose view type (Payments or Activity)
4. Set Subsidy Type to Child Care
5. Set timeframe
6. Click View

Part 7: Advanced Features and Troubleshooting

Setting Up Sibling Discounts

1. Navigate to System Menu > Manage Roles
2. Add permission "Add, Edit, Delete Sibling Discounts" to applicable roles
3. Go to Child Care > Manage Programs
4. Click the details icon for the program
5. Select Create to build the sibling discount
6. Choose percentage-based or amount-based discount
7. Enter appropriate amounts for each fee group
8. Click Save

Managing Online Camp Moves

1. Navigate to Child Care > Browse Programs
2. Find the program and click the edit pencil
3. Click on Registration tab
4. Enable Allow Online Changes
5. Set number of weeks prior for changes
6. Optionally add a change fee
7. Click Save

Troubleshooting Common Issues

"We just created a new program but no Rate Plans are available."

- Check that the Rate Plan's Branch and Category match the program
- Verify the Rate Plan Valid Date Range includes today

"Our program is not showing online."

- Verify the Category is available online: Child Care > Categories > edit pencil > toggle Show Online to Yes
- Check that the correct link is embedded on your website

"Why am I getting 'ineligible member status' during registration?"

- Review the Rate Plan to ensure the Membership Type's Program Registration Group is enabled
- Check that the member has the correct membership type

"Why is the deposit amount not populating during registration?"

- If dues are payable "At Registration," the deposit won't be separated from dues

"We have unscheduled Child Care balances not being automatically drafted."

- Only online registrations are automatically scheduled
- In-house registrations must be manually set up to draft

Childcare Quick Reference

Child Care > Settings > Rate Plans — Create/manage rate plans

Child Care > Programs > Add Child Care Program — Create programs

Child Care > Manage Programs — View all programs
Child Care > Attendance — Track daily attendance
Child Care > Statements > Tax Statements — Generate tax docs

MEMBERSHIP MODULE

Complete guide to membership types, status changes, discounts, check-in, and data management

Part 1: The Absolute Basics

What Daxko Membership Operations Actually Does

Daxko Operations is the software your organization uses to manage all things membership:

- Creating and selling membership packages
- Processing member applications and sign-ups
- Managing renewals, holds, and terminations
- Tracking facility usage
- Processing payments

Think of it as the digital command center for your membership empire.

The Five Questions Every New Membership Person Asks

1. "How do I set up and sell memberships?" → Part 2
2. "What do I do when a member wants to put their membership on hold?" → Part 3
3. "How do I process discounts and corporate memberships?" → Part 4
4. "How do I track who's using our facilities?" → Part 5
5. "How do I not mess everything up?" → Addressed throughout

Part 2: Setting Up and Managing Membership Types

Creating Membership Types (The Building Blocks)

In Daxko, Membership Types are the foundation of EVERYTHING membership-related.

1. Navigate to Membership > Settings > Membership Types > Add New Membership Type
2. On the General Information tab:
 - Enter a Membership Type name (keep it simple like "Adult" or "Family")
 - Write a clear Description (this shows both in-house AND online!)
 - Select the Program Registration Group (usually "Member")
 - Choose the Membership Category ("Facility Member" for most active memberships)
 - Check Allow Discounts if you'll offer discounts on this membership type
 - Check Auto-Renewable for continuous memberships (HIGHLY recommended!)
 - Check Show Online if members can join online

3. On the Membership Rate tab:

- Select the Term (Monthly, Quarterly, Semi-Annual, Annual)
- Choose a Draft Date for automatic payments
- Enter the Join Fee amount (if applicable)
- Enter the Membership Fee amount
- Select the appropriate GL accounts

4. On the Branch Access tab:

- Check the branches where this membership type allows access
- Click Create to finalize

PRO TIP: The membership type NAME appears in dropdown menus, so keep it concise, while the DESCRIPTION can be more detailed about what's included.

Auto-Renew vs. Auto-Terminate (Choose Wisely!)

Auto-Renew Benefits:

- Membership remains continuously active
- Pro-rated dues generate additional revenue
- Billing is consistent (always on the 1st)
- Compatible with discount groups
- Higher retention rates

Auto-Terminate Considerations:

- No pro-rated fees (exact advertised rate)
- Membership automatically ends on anniversary date
- Cannot use discount groups
- Requires manual renewal
- Lower retention rates

IMPORTANT: Daxko strongly recommends setting all your core membership types as auto-renew for optimized retention and easier management!

Special Membership Configurations

Youth Memberships:

- Create specific youth membership types: "Youth" (1 child), "Youth (2)" (2 children), etc.
- Price "Youth (3)" close to a family membership price to encourage families to choose family membership
- Always tie children to an adult account (set adult status to "Inactive" for youth-only memberships)

Trial Memberships:

1. Navigate to System Options > Manage Branches
2. Edit the branch where you want to offer trials
3. Toggle Trial Memberships to "Yes"
4. Set the number of days (1-30)
5. Optionally set age restrictions
6. Refresh the page to get the direct URL for online sign-ups

Short-Term Memberships (Summer, College, etc.):

1. Create a \$0 "Short Term" membership type that auto-terminates
2. Set up a standard program for each short-term offering
3. Add the unit to the "Short Term" membership type
4. Register them for the appropriate program
5. Take payment for program fees (not membership dues)

Part 3: Adding Members and Managing Membership Status

Adding New Memberships

1. Go to Membership > Members > Add Unit
2. Select the appropriate branch and membership type
3. Enter the primary adult's information (name, contact, address)
4. Click Next
5. Add additional members if needed
6. Capture signatures for any required agreements
7. On the Membership Dues Setup screen:
 - Verify the billing cycle and draft date
 - Add any applicable discount groups
 - Add recurring fees if needed (locker rentals, etc.)
8. Click Next
9. Add payment method for auto-renew memberships
10. Click Make Payment to collect initial payment
11. Take photos and add barcodes for all members

PRO TIP: ALWAYS search for the person first (Membership > Search) before adding new units to avoid creating duplicates!

Managing Membership Status Changes

Putting a Membership on Hold:

1. From the Unit Information page, click the edit pencil next to Active Status
2. Select Hold option
3. Choose a reason for the hold
4. Set the start and end dates
5. Enter the "Hold Membership without dues until" date
6. Click Finalize Hold

Hold status automatically releases on the end date, but can be manually released earlier if needed.

Terminating a Membership:

1. From the Unit Information page, click the edit pencil next to Active Status
2. Select Terminate Membership
3. Choose a reason
4. Add any relevant notes
5. Select the end date

6. Click Submit

IMPORTANT: Carefully consider whether a hold or termination is appropriate based on your organization's policies!

Part 4: Discounts, Rate Changes, and Financial Management

Setting Up Discount Groups

1. Navigate to Membership > Settings > Discount Groups
2. Click Add New Discount Group
3. On the General Information step:
 - Enter a unique Group Name
 - Add a Description
 - Set Approval requirements if needed
 - Set an Expiration date if applicable
4. On the Subsidy Billing step (for corporate memberships):
 - Check Link Organization for corporate memberships
 - Add billing contact information
5. On the Discount Amount step:
 - Choose percentage or dollar amount discounts
 - Set Join Fee and Membership Rate discounts
 - Toggle Round Up if desired
 - Set appropriate GL accounts
 - Click Calculate to see the impact
 - Verify each membership type's pricing
 - Click Save

PRO TIP: Create your discount group naming with a standard format (like "FA-50%" for 50% financial assistance) to stay organized!

Adding a Discount Group to a Unit:

During Add Unit:

- On the Membership Dues Setup screen, click Add Discount Group
- Select the appropriate discount group
- Complete the join process

For Existing Units:

- Navigate to the unit
- Click Financial > Dues
- Click Add Discount Group
- Select the discount group
- Click Submit

Note: Only auto-renewing membership types can have discount groups!

Changing Membership Rates

1. Navigate to Membership > Settings > Change Rates

2. Select the membership type to update
3. Enter the new membership rate
4. Specify whether changes apply to:
 - All Units (current, new, and renewing)
 - New and Renewing Units Only
5. Enter a reason for the change
6. Update discount groups using the calculator icon
7. Click Save Changes

IMPORTANT: Rate changes take effect immediately and cannot be scheduled for future dates. They must be submitted before the 1st of the month to impact that month's dues!

The Pay The Day Promotion

This popular promotion makes the join fee match the calendar date:

1. Navigate to Manage Branches > Edit
2. Enable Pay The Day promotion
3. Set start date and length
4. Choose whether to waive prorate
5. Click Update Branch

When active, a member joining on the 14th pays a \$14 join fee. If the standard join fee is less than the date, the lower fee is charged.

Part 5: Check-In and Facility Usage

Rapid Check-In (The Front Desk Lifesaver)

1. Navigate to Membership > Members > Rapid Check-In
2. Configure Device Settings for check-in sounds
3. Use the screen to:
 - View recent check-ins (last 60 minutes)
 - Check in additional family members
 - View scheduled services
 - Check members into specific areas
 - View member notes and alerts
4. Handle alerts and access denials with quick actions:
 - Process payments for outstanding balances
 - Capture required signatures
 - Update expired payment methods
 - Review potential sex offender matches

PRO TIP: Collapsible panels let you hide sensitive information when members are nearby!

Digital Barcodes (For Members Who Forget Their Cards)

1. From membership information, click the edit pencil next to the barcode
2. Select Send to Member
3. Choose SMS or Email delivery

4. Select recipient(s)
5. Click Send

Member Photos and Barcodes

Taking Photos:

1. On the Unit Information screen, click the picture image
2. Position the camera
3. Click Take Photo
4. If needed, click Retake Photo
5. Click Use Photo when satisfied

Adding Barcodes:

1. Hover over the barcode area
2. Click the edit pencil
3. Enter the barcode number from their card
4. Save changes

Part 6: Data Management and Reporting

Merging and Moving Member Records

1. Navigate to Membership > Settings > Data Manager > New Action
2. Select the appropriate action:
 - Merge Member (combines two member records)
 - Move Member (moves a member to another unit)
 - Delete Member (only for zero-data records)
3. Search for the member to modify
4. Select the destination record/unit
5. Review and submit

What transfers in a merge/move: Member notes, Program registrations, Facility usage details, Personal information, Transaction history, Pledges and fundraising information

Key Membership Reports

Membership Summary Report:

- Shows new units/members, current units/members, terminated units, renewed units
- Updates monthly

Membership Sales & Activity Report:

- Displays sales, renewals, terminations, and visits
- Refreshes in real-time

Membership Change Tracking Report:

- Navigate to Browse Reports > Member Information > Membership Change Tracking
- Monitors membership changes (terminations, holds, type changes)
- Helps identify accounts needing policy adjustments



Trial Membership Report:

- Lists all trial memberships with remaining days
- Filters by home branch, trial status, and start date

Part 7: Advanced Features and Tips

Staff Alerts (Important Communications)

1. Go to the system menu > Staff Alerts
2. Click Create a New Staff Alert
3. Enter title and message
4. Select recipients from each quadrant
5. Set display date and acknowledgment requirements
6. Click Save

Member Notes and Alerts

Member Notes (Internal/Staff-Facing):

1. Search for the member
2. Click on their name
3. Click the Notes tab
4. Click Add Note
5. Choose type and enter message
6. Click Save Note

Member Alerts (Member-Facing):

1. Search for the member
2. Click on their name
3. Click Actions > Add Alert
4. Select + New Alert
5. Choose priority, start date, end date
6. Set display options
7. Enter alert message
8. Click Save

GOOD ALERT: "Please pick up your cell phone from the lost and found box at the front desk."

BAD ALERT: "Member left cell phone in the locker room."

Preferred Names

For members who use different names:

1. Locate the Preferred Name field on the member's profile
2. Add their preferred name
3. This will display throughout the system (check-in, online account, etc.)

Membership Quick Reference

Membership > Settings > Membership Types — Create/manage types
Membership > Settings > Discount Groups — Create/manage discounts
Membership > Members > Add Unit — Add new memberships
Membership > Members > Rapid Check-In — Process check-ins
Browse Reports > Member Information — Access reports

FINANCE MODULE

Complete guide to payments, refunds, recurring drafts, and accounting integration

Part 1: The Absolute Basics

What Daxko Finance Operations Actually Does

Daxko Operations handles all your organization's money-related activities:

- Processing payments (credit cards, EFT, cash, checks)
- Managing membership drafts and recurring payments
- Handling refunds, returns, and reversals (and yes, they're all different!)
- Tracking revenue through general ledger accounts
- Exporting financial data to your accounting system

Think of it as the digital cash register and financial control center for your entire organization.

The Five Questions Every New Finance Person Asks

1. "How do I take payments and process them correctly?" → Part 2
2. "What happens when someone wants their money back?" → Part 3
3. "How do I handle membership drafts and recurring payments?" → Part 4
4. "How do the financial transactions make it to our accounting system?" → Part 5
5. "Why are there so many types of payments and what's the difference?" → Throughout

Part 2: Taking Payments & Closing Out Your Day

Understanding Payment Types in Daxko

Daxko handles several different types of payments:

- Credit Card — Processed electronically through Daxko using your merchant account
- Swipe — Credit card processed through an external terminal (not through Daxko)
- EFT — Electronic Funds Transfer (bank draft)
- Cash — Physical cash payments
- Check — Physical check payments

IMPORTANT: Each type is processed differently in the system, so it's important to select the correct payment method when receipting payments.

How to Process Payments Correctly

1. Find the member's account by searching for them
2. Click on their Balance Due to get to the Account Balance screen
3. Select the fees you want to pay by checking the boxes next to them
4. Click Make Payment
5. Enter the payment amount (defaults to the full amount due)
6. Select the payment method:
 - Stored Credit Card/EFT: If the member has payment info on file
 - New Credit Card: For one-time card payments
 - Cash: For cash payments
 - Check: For check payments (be sure to enter the check number!)
 - Swipe Terminal: For external credit card terminal payments
7. Click Pay Now

PRO TIP: When using the Swipe Terminal option, you need to enter both the cardholder name AND the authorization code from your terminal. This proves the payment was actually processed.

Splitting Payments Among Multiple Parties

Sometimes grandparents pay for their grandkids, or divorced parents split program costs:

1. Process the first payment as usual, but only enter the amount that the first party is paying
2. Click Make Payment
3. Complete the payment
4. Return to the account balance screen
5. Repeat the process for each party who is contributing

End-of-Day: Shift Close-Outs

At the end of your shift, you need to reconcile all the cash and check payments:

1. Navigate to Finance > Checks/Cash > Shift Close-Outs
2. If you have multiple branches, select your branch
3. Click New Close-out
4. You'll see a list of all payments you've taken today
5. Check the boxes next to all the payments that need to be closed out
6. NOTE: Checks and cash are in separate tabs, so check both!
7. Click Close-out at the bottom of the screen
8. Review the close-out summary and print it if needed

WHAT IF THE MONEY DOESN'T MATCH? If what's in your drawer doesn't match what Daxko says:

- Payment Reverse: For incorrect payment amounts or methods
- Edit Payment Branch: If a payment was recorded to the wrong branch
- For shortages or overages, make a written note on your close-out receipt

Completing the Deposit

The day after all shift close-outs are done, someone needs to create a deposit:

1. Navigate to Finance > Checks/Cash > Deposit List
2. If multi-branch, select the correct branch
3. Click New Deposit
4. The current date will appear as the deposit date
5. Check the boxes next to the shift close-outs to include in the deposit
6. Review the amounts for accuracy
7. Click Deposit to finalize

⚠ WARNING: Create a deposit that aligns with what was taken to the bank. Bank deposit slip should equal the deposit made in Daxko. A deposit can only be reversed on the same day it was created.

Part 3: Refunds, Returns, and Reversals

This is where people get confused, so pay close attention! These three processes might sound similar, but they're used in completely different situations:

Refunds

Used when a transaction is complete, but you need to return money to the member:

1. Go to the member's Transactions screen
2. Click the detail arrow next to the fee (not the payment!)
3. Check the boxes next to the items to refund
4. Click Cancel
5. Review and click Cancel Now
6. Select the refund method (will default to original payment type)
7. Enter the refund amount and reason
8. Click Submit Refund for Unit

IMPORTANT: Credit Card, EFT, and Check refunds must be approved before processing! Navigate to Finance > Accounting > Refunds > Approve Refund to complete the process.

Reversals

Used for unfinished transactions that haven't been deposited yet:

1. Go to Finance > Checks/Cash > Payment Reverse
2. Select the branch and whether the reversal is "Before Close-Out" or "After Close-Out"
3. Find the payment and click the Reverse icon
4. Click Cancel Payment

This puts the balance back on the member's account without going through the refund approval process.

Returns

Used when a payment fails after processing (like a bounced check or credit card chargeback):

1. Go to the member's Transactions screen
2. Click the detail arrow next to the payment (not the fee!)

3. Select a Return Reason from the dropdown
4. Click Post Bounced Payment

This adds the payment to the Returns Manager report and puts the balance back on the member's account.

⚠ WARNING: Once a return is processed, it can't be turned into a refund. If needed, you'll have to manually issue a check or refund a different fee.

Part 4: Managing Recurring Payments and Drafts

Understanding the Pending Batch

The Pending Batch is where all scheduled EFT and Credit Card payments wait until they process:

- Membership dues drafts
- Scheduled program payments
- Child care payments
- Scheduled pledge payments

To view the Pending Batch:

1. Go to Finance > Electronic Payments > Pending Batch
2. Use filters to find what you're looking for:
 - Branch: For multi-branch organizations
 - Type: Operations or Pledges
 - Payment Method: EFT or Credit Card
 - Batch Status: Automatically Scheduled, Manually Scheduled, or Processed Today
 - Next ___ Days: Filter by upcoming draft date

Note: You can only view next month's drafts after the 1st of the current month.

Removing a Payment from the Pending Batch

1. Locate the payment in the Pending Batch
2. Click into the detail of that day's batch
3. Find the specific payment (you can search by name or unit ID)
4. Click the Reverse edit pencil
5. Click Cancel Schedule

IMPORTANT: This only removes the scheduled payment. The balance will remain on the member's account unless you also cancel the fee.

Using the Due Pre-Calculate Report

This is the best report for preparing for the upcoming membership draft:

1. Go to Finance > Accounting > Due Pre-Calculate
2. The report is initially generated on the 20th of the month for the next month's draft
3. It updates nightly until the last day of the month
4. Review each tab:
 - Summary: Overview of draft amounts by date
 - EFT: Units drafting via bank account

- Credit Card: Units drafting via credit card
- Invoice: Units being invoiced
- Termination: Units terminating before month-end
- Next Process Date: Units with past process dates (red flag!)
- GL Account: Projected cash flow by GL account
- Adjustments: Units receiving discounts

Updating Billing Methods

If a member wants to change their payment method:

1. Go to the member's Membership Information screen
2. Click Financial > Billing Methods
3. Click Add Credit Card or use the dropdown to Add Electronic Fund Transfer
4. Enter the new payment information
5. Check Set as default to make this the primary payment method
6. Click Add Billing Method
7. In the "Scheduled Payments" modal that appears, select which payment types to update
8. Click Yes, Use New Method

GREAT NEWS: Membership drafts in the pending batch will automatically update to the new method. Other scheduled payments will need to be manually updated.

Part 5: Financial Reporting and Accounting Integration

Understanding Account Entries

Account Entries shows all the financial transactions in Daxko organized by general ledger (GL) account:

1. Navigate to Finance > Accounting > Account Entries
2. You'll see three tabs:
 - Cash Entries: All payment activity organized by type
 - Close-Out Entries: Revenue and receivables entries
 - Pledge Entries: All pledge-related entries

PRO TIP: You can fix mis-coded revenue before export by going to the Close-Out tab, finding the incorrect GL, clicking the detail icon, and using the edit pencil to select the correct GL.

Exporting to Your Accounting System

Daxko Operations can export financial data to your accounting system:

1. Go to Finance > Accounting > Export
2. Click New Export
3. The start date will populate based on your last export
4. Enter the end date and select your accounting system
5. Click View then Export
6. Click Export to accounting
7. Once posted in your accounting system, click Mark as Posted

BEST PRACTICE: Export daily for the most detailed accounting records.

Integration with Daxko Accounting

If you use Daxko Accounting, there's a direct integration:

1. In Daxko Operations, navigate as above and export
2. In Daxko Accounting, go to General Ledger > Importing
3. Click Import Journal Entry File
4. Select your file and click Import file
5. Validate the file in the Queue
6. Review the entries and click Post now

Note: You must update the file status in Daxko Operations by clicking "Mark as Posted" after successfully posting in Daxko Accounting.

Setting Up GL Accounts

In Daxko Accounting:

1. Go to General Ledger > Chart of Accounts > Manage Account Components
2. Set up your account components (Fund, Branch, Department, etc.)
3. Then go to General Ledger > Chart of Accounts > Create One Account
4. Select components, name the account, and set status to "Active"

In Daxko Operations:

1. Go to Finance > Settings > GL Acct. Setup
2. Click Add New GL Account
3. Enter the Account Number and Name (must match the format in Daxko Accounting)
4. Select the Account Type (Revenue, Liability, Asset, or Expense)
5. Configure Account Settings and Display options
6. Click Add Account

⚠ WARNING: The account number format must match exactly between systems, including dashes!

Finance Quick Reference

Finance > Checks/Cash > Shift Close-Outs — End-of-day reconciliation

Finance > Checks/Cash > Deposit List — Create deposits

Finance > Electronic Payments > Pending Batch — View scheduled drafts

Finance > Accounting > Account Entries — View GL transactions

Finance > Accounting > Export — Export to accounting system

Finance > Accounting > Refunds > Approve Refund — Approve refunds

FUNDRAISING MODULE

Complete guide to pledges, campaigns, online giving, and donor management

Part 1: The Absolute Basics

What Daxko Fundraising Operations Actually Does

Daxko Fundraising is the module within Daxko Operations that handles all donation-related activities:

- Tracking pledges and donations
- Managing fundraising campaigns
- Processing payments on pledges
- Creating tax statements for donors
- Handling online giving
- Integrating with external fundraising platforms

Think of it as your digital pledge card and donation tracking system all rolled into one.

Fundraising Terminology Explained

- Campaign — An organized fundraising effort with a specific timeline and goal (e.g., "2025 Annual Campaign")
- Campaigner — A volunteer or staff member who solicits donations
- Prospect — A potential donor you plan to solicit
- Pledge — A promise to give a specific amount (can be paid at once or over time)
- Donor — Someone who has made a pledge or gift to your organization
- Campaign Season — The timeframe when a campaign is active
- Template — The category or type of campaign (e.g., Annual Campaign, Capital Campaign)
- Designation — A specific purpose for which a donation is intended (e.g., "Scholarship Fund")

Part 2: Entering Pledges and Donations

Entering a One-Time Gift

When a donor makes a one-time gift (they pledge and pay immediately):

1. Look up the donor by searching from the homepage (Last Name, First Name)
2. Click Financial > Donations
3. From the Gifts tab, select + Add Pledge
4. Enter the pledge details and single payment amount
5. Set Frequency to Once
6. Choose a payment method
7. Review and click Give Today
8. If the donor is paying immediately by cash/check, go to Donation History
9. Click the detail icon of the pledge
10. Enter/confirm payment amount
11. Click Make Payment
12. Enter payment details and click Submit

Entering a Recurring Gift

For a donor who wants to give over time (like a monthly draft):

1. Look up the donor by searching from the homepage
2. Click Financial > Donations
3. From the Gifts tab, select + Add Pledge
4. Enter the pledge details and recurring payment amount:
 - Enter the total pledge amount
 - Create the desired recurring schedule
 - Pledge draft dates can differ from membership draft dates
5. Choose a payment method
6. Review and click Give Today

PRO TIP: Recurring donations set up with a draft payment method will automatically process on the scheduled dates. No manual intervention required!

Editing a Pledge

If No Payments Have Been Made:

1. Navigate to the donor's Donations page
2. Click the detail icon for the pledge
3. Click Edit Schedule
4. Click the Edit Pencil
5. Change the amount and click the checkmark
6. Click Save

If Payments Have Been Made and You Need to Increase:

1. Navigate to the donor's Donations page
2. Click the detail icon for the pledge
3. Click Edit Schedule
4. Click Add Payments
5. Enter the additional amount
6. Click Apply then Save

IMPORTANT: You cannot decrease a pledge amount after any payments have been made. To handle this situation, you'll need to either write off the remaining balance or use the Corrections Campaign.

Deleting a Pledge Made in Error

You can only delete pledges that are either unpaid or fully refunded:

1. Navigate to the donor's Donations page
2. Click the detail icon for the pledge
3. Click Delete Pledge
4. Optional: Enter a reason for deletion
5. Click Delete Now

⚠ WARNING: Once a pledge is deleted, the action cannot be undone. The pledge will be removed from the donor's record, including their donation tax statement.

Part 3: Campaign Setup and Management

Understanding Campaigns, Seasons, and Templates

Before you can enter pledges, you need to have campaigns set up correctly:

- Templates categorize the type of campaign (Annual, Capital, Special Event)
- Seasons define the timeframe when the campaign is active
- Campaigns are the specific fundraising efforts tied to a template and season

Setting Up a Campaign Season:

1. Navigate to Fundraising > Settings > Campaign Seasons
2. Click Add Season
3. Enter a Season Code (like "2025") and Season Name
4. Enter the Start Date and End Date for the season
5. Click Add Season

Setting Up a Campaign Template:

1. Navigate to Fundraising > Settings > Templates
2. Click Add New Template
3. Enter the Template Code and Template Name
4. Choose a Campaign Type (e.g., Annual Campaign)
5. Click Update

Creating a New Campaign:

1. Navigate to Fundraising > Campaigns > Manage Campaigns
2. Click Add New Campaign
3. Enter the Campaign Code and Campaign Name
4. Select the Branch
5. Choose the Template and Season
6. Set a Campaign Goal amount
7. Choose the Revenue GL account
8. Click Create

Setting Up Designations

Designations allow donors to specify how they want their donation used:

1. Navigate to Fundraising > Settings > Designations
2. Click Add Designation
3. Enter the Designation Name
4. Choose the Status (Active or Inactive)
5. Link to the appropriate General Ledger accounts
6. Click Save

Note: Always have one designation labeled "None" to handle donations without a specific designation.

Part 4: Online Giving and Integrations

Setting Up Online Giving

1. Navigate to Fundraising > Settings > Online Giving
2. Set Do you wish to accept donations during online checkout? to Yes
3. Choose a campaign to link to online donations
4. Optionally add a custom message
5. Click Save

Customizing Online Donation Amounts:

1. Navigate to Fundraising > Manage Campaigns
2. Click the Control Panel icon for your campaign
3. Click Edit
4. Modify the amounts in the Suggested Donation Amounts boxes
5. Click Update

Managing Online Donations

When donations come in online, you'll need to match them to existing members or create new records:

1. Navigate to Fundraising > Online Giving > Manage Online Donations
2. Set your date range and click View
3. For each donation, click Check duplicates
4. If it's a match, click Move Donation
5. If it's not a match, click Create Unit to create a new member record

PRO TIP: The system will automatically match donors when their first name, last name, email, and phone match exactly what's in your database.

Integrating with External Fundraising Platforms

Daxko can integrate with several external fundraising platforms like Classy and Funraise:

Setting Up Classy Integration:

1. Contact Daxko Support to enable the integration
2. Ensure you have the Manage Integrations permission
3. Navigate to Fundraising > Tools > Integrations
4. Select Classy
5. Enter your Organization ID, Client ID, and Client Secret from Classy
6. Click Connect
7. Map your Classy campaigns to Daxko campaigns
8. Set a start date for syncing donations
9. Click Save and Turn On

IMPORTANT: These integrations are one-way, from the external platform to Daxko. Donations made in these platforms are automatically adjusted since the revenue recognition happens in those systems.

Part 5: Special Donation Situations

Handling In-Kind Gifts

For non-cash donations (like equipment, services, or assets):

1. Navigate to the donor's Donations page
2. Click Add In-Kind Gift
3. Fill in required fields:
 - Description of the gift
 - Fair Market Value
 - Method of Valuation
 - Date Gift Made
 - Asset Account
 - Check Include in Campaign Reports if you want the value included in campaign totals
4. Click Submit

Processing Anonymous Donations

1. Create a member unit called "Anonymous Donor"
2. Navigate to Financial > Donations
3. Add a pledge and record the payment as usual
4. The donation will appear in your campaign totals without identifying the donor

Converting Regular Fees to Donations

For Unpaid Balances:

1. On the Account Balance screen, select the fee
2. Click the arrow next to Make Payment
3. Select Convert to Donation
4. Select the appropriate campaign
5. Enter payment details
6. Click Submit

For Already Paid Fees:

1. Navigate to Financial > Transactions
2. Click the detail icon on the payment
3. Click Convert Payment to Donation
4. Select the appropriate campaign
5. Click Submit

Refunding a Pledge Payment

1. Navigate to the donor's Donations page
2. Click on the Amount Paid for the pledge
3. Check the box beside the payment to refund
4. Select a Refund Method from the dropdown
5. Choose either:
 - Refund and Write Off Amount: The payment is refunded and the balance is zeroed out

- Refund and Keep Balance: The payment is refunded but the pledge balance remains

6. Confirm with Yes

Note: Refunds must be approved in Finance > Accounting > Refunds > Approve Refund before they're processed.

Part 6: Reporting and Analysis

Key Fundraising Reports

Pledge Amount Summary:

- Navigate to Fundraising > Reports > Pledge Amount Summary
- Shows pledges made for a particular campaign and date range
- Includes totals for pledge amount, paid amount, written off amount, and balance due

Pledge Payment Summary:

- Navigate to Fundraising > Reports > Pledge Payment Summary
- Shows payments made during a specific date range
- Filters by payment method, donation method, and campaign

Pledge Payment Projection:

- Navigate to Fundraising > Reports > Pledge Payment Projection
- Shows expected future payments based on current pledges
- Useful for cash flow projections

Pledge Reminder:

- Navigate to Fundraising > Reports > Pledge Reminder
- Identifies donors who have scheduled payments or pledges due
- Great for sending invoice reminders

Designation Summary:

- Navigate to Fundraising > Reports > Designation Summary
- Shows pledge and payment information by designation
- Helps track how designated funds are coming in

Creating a "Do Not Call" List

1. Create a Note Type with code "DNC" and description "Do Not Call"
2. Add this note to donors who don't wish to be contacted
3. Run the Fundraising: Note Type Report from Custom Reports to generate a "Do Not Call" list

Fundraising Quick Reference

Financial > Donations > Add Pledge — Enter new pledges

Fundraising > Campaigns > Manage Campaigns — Manage campaigns

Fundraising > Settings > Campaign Seasons — Set up seasons

Fundraising > Online Giving > Manage Online Donations — Process online gifts

Fundraising > Reports — Access all fundraising reports

PROGRAM MODULE

Complete guide to program setup, registrations, waitlists, and package management

Part 1: The Absolute Basics

What Daxko Program Operations Actually Does

Daxko Operations is the software your organization uses to manage all things program-related:

- Creating and organizing program offerings
- Managing registrations and waitlists
- Processing payments and scheduling installments
- Tracking attendance and participation
- Handling package programs like personal training

Think of it as the digital command center for your program empire.

The Five Questions Every New Program Person Asks

1. "How do I set up a new program?" → Part 2
2. "What do I do when a program is full?" → Part 3 (Waitlist management)
3. "How do I handle program packages like personal training?" → Part 4
4. "How do I move a participant from one program to another?" → Part 5
5. "How do I not mess everything up?" → Addressed throughout

Part 2: Setting Up Standard Programs

Understanding the Program Structure

In Daxko, the program hierarchy is structured like this:

Programs → Sessions → Segments

- Program: The overall category (e.g., "Youth Basketball")
- Session: The specific offering (e.g., "Fall Youth Basketball")
- Segment: The individual timeframes within a session (e.g., specific weeks or dates)

Getting this structure clear in your head will make everything else much easier!

Step 1: Creating a Program (The Foundation)

1. Navigate to Programs > Create Program > Standard Program
2. Enter a unique Program Name (keep it simple but descriptive)
3. Optionally add a Registration Fee (charged once, in addition to session fees)
4. Select appropriate Program Tags (departments, branches, seasons, etc.)
5. Click Create Program

PRO TIP: Use a naming convention that makes programs easy to find. Some organizations use numbers at the beginning of names to control the order they appear in.

PRO TIP: Program Tags are super important for organization and searchability. Be consistent with your tagging strategy!

Step 2: Creating a Session

After creating the Program, choose "Create a Session" and complete these tabs:

Tab 1: General Information

- Enter a descriptive Session Name (this is what members will see!)
- Add a detailed Description (be thorough - this displays online!)
- Tags from the Program automatically transfer, but you can add more
- Add any required Agreements (waivers, conduct codes, etc.)
- List any special Requirements

Tab 2: Locations and Instructors

- Select the Branch, Site, and optionally an Area
- Choose Days of the Week and Times
- Add Contact Information for the program manager
- Enter Instructor Information to display during registration
- Set up Communication options like notification emails

Tab 3: Registration Settings

- Select eligible Registration Groups (Member, Non-Member, etc.)
- Set Registration Dates (can be different for each group)
- Configure Segment Selection options
- Set up Fees and GL Accounts (can differ by registration group)
- Enable and set Age Restrictions if needed
- Specify Gender Restrictions if applicable
- Enable Scholarships if they can be used for this session

Setting Up Segments

Click Add Segments and choose either:

Add Single Segment (for one continuous period):

- Set Start Date and End Date
- Choose when payment is Due (at registration or future date)
- Optionally set Minimums, Maximums, and Goals for participation
- Configure Waitlist options
- Enter optional Deposit and required Fee Amount

Add Recurring Segments (for multiple, repeated periods):

- Set Recurrence Pattern (daily, weekly, monthly)
- Enter Start Date and either end date or number of occurrences
- Configure Due Date options (can be different for each segment)
- Set participation limits and waitlist options

- Enter fee information

IMPORTANT: Make sure the Segment Selection setting on Tab 3 is configured correctly for your recurring segments! This determines whether participants can choose specific segments or must register for all of them.

Part 3: Managing Registrations and Waitlists

Registering a Participant for a Program

1. Search for the participant through Membership > Members > Search
2. Select the participant from search results
3. Click Member Actions > Register for Programs
4. Select the appropriate Program Tag
5. Find the program and click Register
6. For multiple offerings, select Register for multiple offerings
7. Complete all screen prompts (including answering any program questions)
8. Review registration details
9. Click Register to complete
10. Process payment or schedule future payments on the Account Balance screen

Setting Up and Managing Waitlists

Setting Up a Waitlist:

During program setup on the Registration Settings tab, select one of these waitlist options:

- Not Allowed: Enforces the maximum number and cuts off further registration
- Allowed - Show Count: Shows staff and parents their position in line
- Allowed - Hide Count: Shows there's a waitlist but not their position

Managing a Waitlist:

1. Navigate to Programs > Manage Programs
2. Select the Program and Session
3. Click Create Roster or Balance Due Roster
4. In the top right corner, click View Waiting List
5. From here you can: Add registrant to roster or Delete from waitlist

IMPORTANT: When someone is moved from the waitlist to the roster: Fees will now be due on their profile (you'll need to collect payment), and YOU must notify them they've been added (no automatic notification happens).

Moving or Cancelling Participants

Moving a Participant to a Different Program:

1. Go to the participant's Membership Information page
2. Click Financial > Transactions
3. Find the initial registration and click the detail arrow
4. Check the box next to the program you want to move them from
5. Select Move Participant

6. Select the new program and session
7. Complete the process (answering any new questions or signing waivers)
8. Review and finalize the move

Cancelling a Registration:

1. Go to the participant's Membership Information page
2. Click Financial > Transactions
3. Find the registration to cancel and click the detail arrow
4. Click Cancel (for single segment) or select segments and click Cancel Registration
5. Choose whether to keep them on the roster (usually no)
6. If payment was made, process a refund or issue system credit

PRO TIP: If you need to change a fee from member to non-member rate (or vice versa), you'll need to cancel the registration and re-register the person at the correct rate.

Part 4: Program Packages and Payment Management

Setting Up Program Packages

Program Packages are perfect for services that involve multiple sessions redeemable over time, like personal training:

Creating a Program Package:

1. Navigate to Programs > Create Program > Package Program
2. Enter a unique Program Name
3. Add Program Tags (use separate tags from standard programs!)
4. Click Create Program
5. Set up your Package Session with:
 - Session details (name, description, tags, agreements)
 - Location and instructor information
 - Package offerings (combining quantities and durations)
 - Registration settings (eligibility, dates, fees)

Best Practices for Program Packages:

- Separate packages at the point that the same duration/quantity is offered at different prices
- For group packages (like buddy training), have each participant purchase their own package
- Always set appropriate Expiration Dates for packages
- Collect payment at the time of purchase
- Consider whether to enable recurring monthly packages (for predictable revenue)

Redeeming Package Sessions

Instructor Redemption (Mobile-Friendly Experience):

1. Enable appropriate permissions: "Instructor Redemption - Basic" or "Instructor Redemption - Admin"
2. Access the redemption tool at operations.daxko.com/redeem
3. Log in with Daxko credentials

4. View list of registrants with available sessions
5. Select a registrant to view details
6. Click Redeem Session
7. Have participant sign to confirm
8. View updated session count and expiration date

PRO TIP: Create a home screen shortcut on mobile devices for quick access to the redemption tool!

Managing Program Payments

Scheduling Future Payments:

1. Complete program registration
2. On the Account Balance screen, check boxes next to fees to schedule
3. Click the dropdown on Make Payment and select Schedule Payments
4. Choose a payment method (stored or new)
5. Select draft schedule (by due dates or custom)
6. Click Generate Schedule
7. Review and save

Splitting Payments Among Multiple Parties:

For situations like divorced parents or team registrations:

1. Complete registration and go to Account Balance
2. Enter the amount the first party is paying
3. Click Make Payment and process that payment
4. Return to Account Balance
5. Repeat for other parties until balance is paid

Part 5: Advanced Program Features

Program Questions (Collecting Additional Information)

Adding questions to programs allows you to collect crucial information during registration:

1. Navigate to the Program level (not Session) and scroll to "Program Questions"
2. Click Add Section to create a category for your questions
3. Click the green + next to your section
4. Choose between:
 - Member Questions: Pull from existing member data
 - Custom Questions: Create new questions with various formats
5. For custom questions, select type (text, dropdown, etc.)
6. For answer lists, add all possible answers
7. Optionally add fees to specific answers

PRO TIP: Question fees (like t-shirt sizes) are separate from session fees, and you'll need to set GL accounts for each answer option.

Copy Program Sessions (Huge Time-Saver!)

This feature is your best friend for recurring programs:

1. Navigate to Programs > Manage Programs
2. Find the session you want to copy
3. Click the Copy icon
4. Use the modal to adjust:
 - General Information (name, description)
 - Days and Time
 - Registration Dates
 - Segment Dates
5. Click Save or Save and Edit for more advanced changes

This works great for: Copying a session with different days/times, Moving a program from last year to this year, Duplicating programs with multiple segments.

Camp Sub-Rosters

For camp programs that need organized groups:

1. Create the first sub-roster shell (e.g., "Activity Alpha")
2. Click Quick Create
3. Choose to copy the description
4. Select instances that need this same sub-roster
5. Click Create

This saves massive time when creating the same activities across multiple camp instances!

Part 6: Reporting and Best Practices

Program Entry Standards

Consistent naming and organization makes everyone's life easier:

Program Names:

- Keep them short and descriptive
- Capitalize each word
- Use numbers at the beginning for ordering if needed

Session Names:

- Include relevant details like age ranges
- Consider what appears on receipts
- Be consistent with formatting

Tags:

- Capitalize and spell consistently
- Avoid internal terms or abbreviations
- Create a tag bank for staff to copy from
- Regularly clean up and edit tags

Q&A Rosters and Reports



Need to see what participants answered to your questions?

1. Navigate to the program
2. Create a roster
3. Click Q&A Roster
4. View or export participant responses

Program Quick Reference

Programs > Create Program > Standard Program — Create traditional programs

Programs > Create Program > Package Program — Create personal training/packages

Programs > Manage Tags — Organize and clean up tags

Programs > Manage Programs — Access roster and waitlists

Financial > Transactions — View/manage registration payments

You've Made It!

Don't worry if it all feels overwhelming right now — nobody masters this in a day. Keep this guide handy, bookmark those frequently used pages, and ask for help when you need it.

Need Help?

Skeehan & Young specializes in Daxko implementations and ongoing support for YMCAs and nonprofits.

www.skeehanandyoung.com