

## Virtual Areas

This release contains a new feature that allows associations to create business rules required for barcode access to virtual webpages by creating virtual areas. These updates will be available to all associations on **Wednesday, June 10<sup>th</sup>**.

This release will require setup in Daxko Operations as well as changes to an association's website to link to a barcode validation page. This dual effort is required as Daxko does not own the content (videos, articles, resources, etc) that resides on each association's website. For those associations wishing to use advanced features it will require more extensive web development.

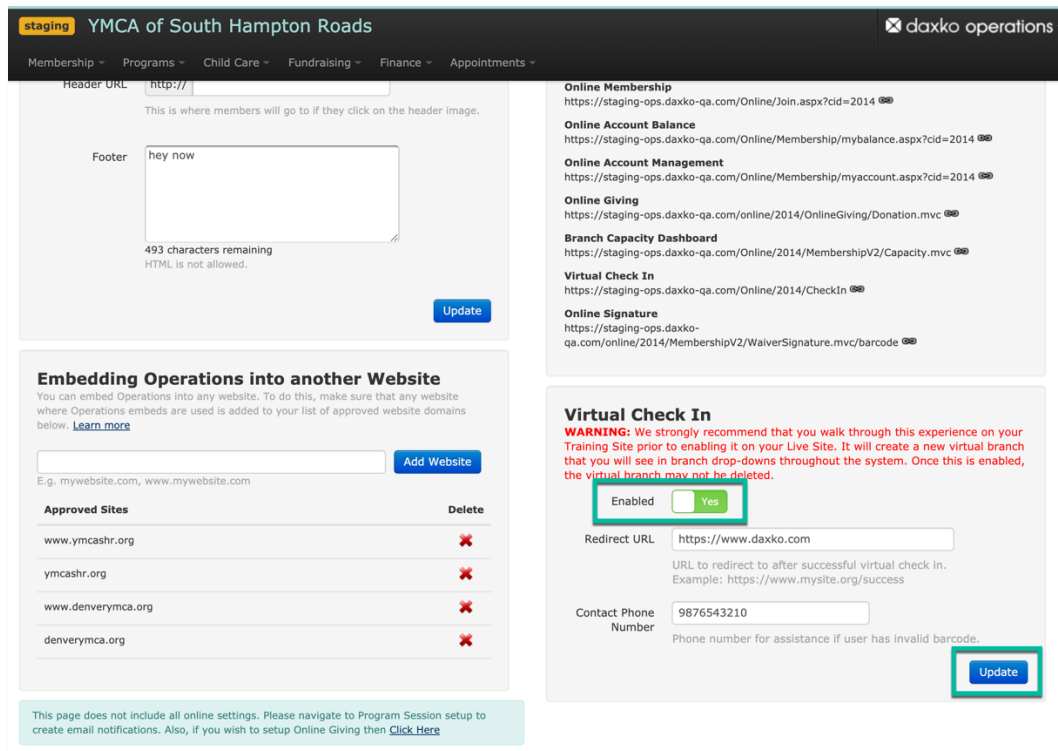
This guide contains instructions for the setup and ongoing changes in Daxko Operations. Please note that a more advanced integration will require the skills and expertise of a web developer outside of Daxko Operations. Our Support Team will be available to assist on the functionality contained in Daxko Operations, and Virtual Areas includes instructions for web developers to begin the tasks required for website changes.

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## Create Virtual Branch

To begin, each association must enable Virtual Check In in Online Settings. Once this feature is enabled, your association will be able to create Virtual Areas.

To learn more about Virtual Check In, please access our April 15<sup>th</sup> release on the Daxko Product Blog.



The screenshot displays the Daxko Operations interface for the YMCA of South Hampton Roads. The top navigation bar includes links for Membership, Programs, Child Care, Fundraising, Finance, and Appointments. The main content area is divided into several sections:

- Header URL:** A text input field containing "http://". Below it, a note states: "This is where members will go to if they click on the header image."
- Footer:** A text input field containing "hey now". Below it, a note states: "493 characters remaining. HTML is not allowed." An "Update" button is located below the footer field.
- Embedding Operations into another Website:** A section with a text input field for a website URL (example: "www.mywebsite.com") and an "Add Website" button. Below this is a table of "Approved Sites":

Approved Sites	Delete
www.ymcashr.org	✖
ymcashr.org	✖
www.denverymca.org	✖
denverymca.org	✖
- Online Membership:** A link to "https://staging-ops.daxko-qa.com/Online/Join.aspx?cid=2014".
- Online Account Balance:** A link to "https://staging-ops.daxko-qa.com/Online/Membership/mybalance.aspx?cid=2014".
- Online Account Management:** A link to "https://staging-ops.daxko-qa.com/Online/Membership/myaccount.aspx?cid=2014".
- Online Giving:** A link to "https://staging-ops.daxko-qa.com/online/2014/OnlineGiving/Donation.mvc".
- Branch Capacity Dashboard:** A link to "https://staging-ops.daxko-qa.com/Online/2014/MembershipV2/Capacity.mvc".
- Virtual Check In:** A section with a "WARNING" message: "We strongly recommend that you walk through this experience on your Training Site prior to enabling it on your Live Site. It will create a new virtual branch that you will see in branch drop-downs throughout the system. Once this is enabled, the virtual branch may not be deleted." Below the warning is a toggle switch for "Enabled" set to "Yes". There is a "Redirect URL" input field containing "https://www.daxko.com" and a note: "URL to redirect to after successful virtual check in. Example: https://www.mysite.org/success". There is also a "Contact Phone Number" input field containing "9876543210" and a note: "Phone number for assistance if user has invalid barcode." An "Update" button is located at the bottom right of this section.



## New Permissions

We have added two new permissions for this release. The first permission – Virtual Areas – allows users to access the list of virtual areas, add areas, and edit areas. The second permission – Virtual Areas Custom Integration – should only be given to staff with web development responsibilities, as making changes to custom integrations can have cascading effects on your website.

The screenshot shows the permissions interface for the YMCA of South Hampton Roads. The 'Membership' section contains a list of permissions, with 'Virtual Areas' and 'Virtual Areas - Custom Integration' highlighted by a red box. Other permissions include Search Members, Add New Units, Edit Unit, Change Status, View Transactions, Edit Credit Card Billing Methods, View Member Info, Edit Member Info, Add New Members, View History, Membership Cards, Update Photo, Membership Dues, Update Next Process Date, View Membership Information, Reset Next Process Date, Update Unit Contact Info, Edit EFT Billing Method, View Full EFT Account Numbers, Apply One-time Adjustments, Apply Recurring Adjustments, Apply Discount Groups, Edit Member Type, Remove Pending Batch / Write Off At Termination, Update Scheduled Payments, Mark As Deceased, Approve Discount Group, Edit Discount Group Expiration, Scan Drivers License, View Areas, Manage Areas, Child Watch Area Checkin, Account Balance, Make Payments, Manage Unit Fee Setup, Manage Scholarship, Facility Access - Read Only, Facility Access - Manage, Change Authorized Pickups, Convert Prospect, Apply Admin Adjustments, and Data Cleansing Updates.

## Add Virtual Area

To begin, those users with permissions will navigate to Membership > Settings > Virtual Areas.

The screenshot shows the navigation menu for the YMCA of South Hampton Roads. The 'Membership' menu is open, showing categories: Members, Organizations, Prospects, Settings, and Reports. The 'Virtual Areas' option is highlighted under the 'Settings' category.

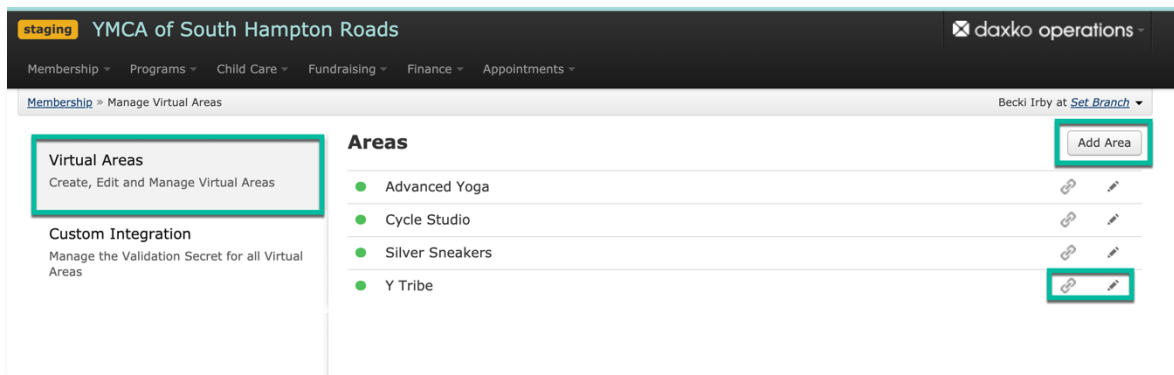


## Daxko Operations: Virtual Areas

This new page contains two tabs. The first will be used to create virtual areas for your association. Some associations will create only one virtual area, but note that you are able to create as many as needed based on the business rules contained in the add process. When creating each area, users will consider the area as a section of web content only accessible by those who meet a set of criteria.

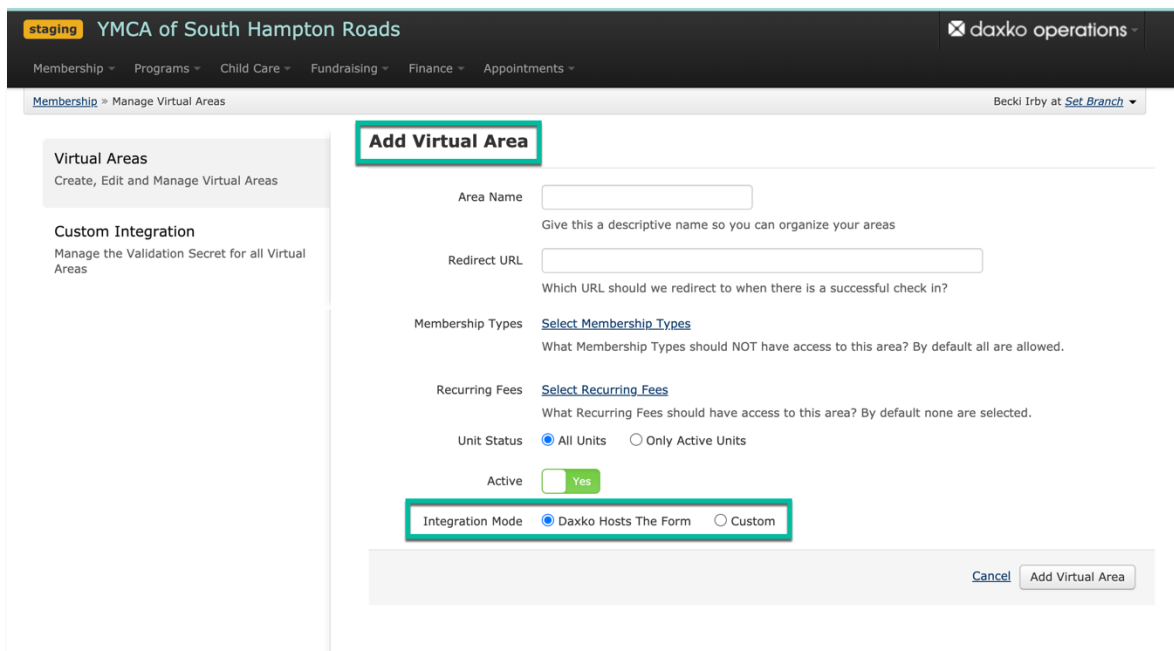
For example, if an association has several top tier memberships that include virtual workouts, associations will want to create one area and establish rules for the valid memberships across branches.

If, in addition, the association wants all family membership types to have access to educational content for children, a second area may be created for that purpose. We recommend using the Training Site to add areas to practice the functionality, which will be quite helpful in determining the number of virtual areas needed.



The screenshot shows the 'Manage Virtual Areas' page for the YMCA of South Hampton Roads. The page has a navigation menu with options like Membership, Programs, Child Care, Fundraising, Finance, and Appointments. The main content area is titled 'Virtual Areas' and contains a list of existing areas: Advanced Yoga, Cycle Studio, Silver Sneakers, and Y Tribe. Each area has a link icon and an edit icon. A red box highlights the 'Add Area' button in the top right corner.

When a user selects Add Area, the user will enter an area name and a redirect URL for successful check ins. Also, users may set a status for the area – active or inactive. Most importantly, users will select an integration mode which we will detail in the integration section below. Once saved, a URL link may be copied per area.



The screenshot shows the 'Add Virtual Area' form. The form includes the following fields and options:

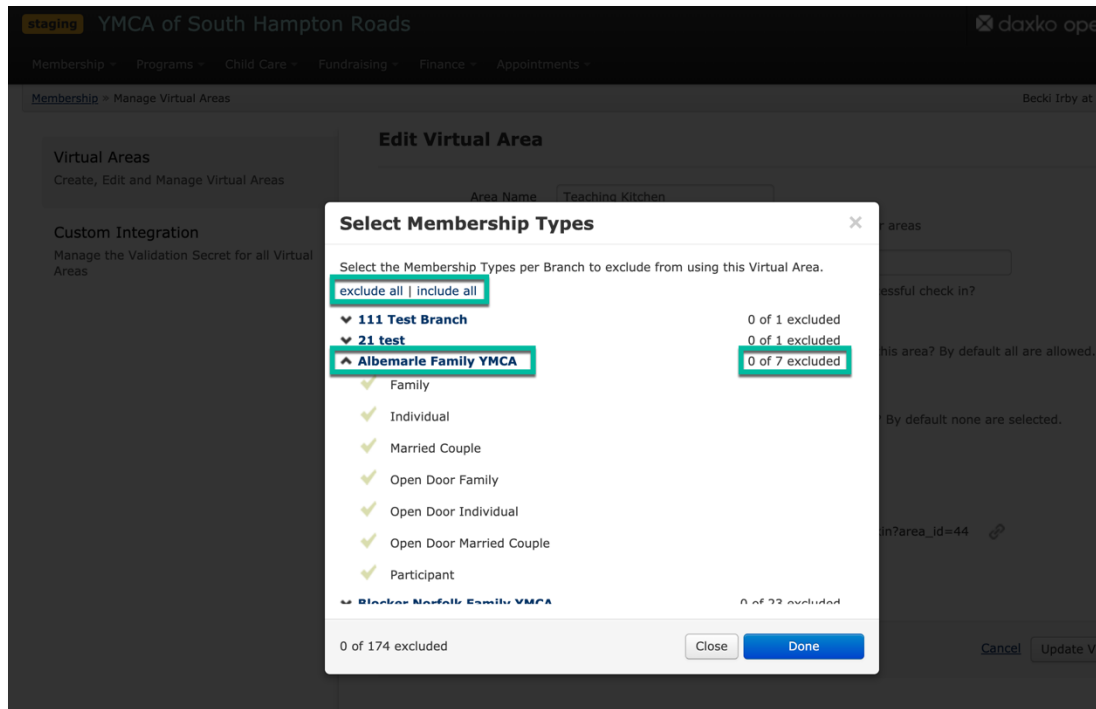
- Area Name:** A text input field with a placeholder "Give this a descriptive name so you can organize your areas".
- Redirect URL:** A text input field with a placeholder "Which URL should we redirect to when there is a successful check in?".
- Membership Types:** A link labeled "Select Membership Types" with a placeholder "What Membership Types should NOT have access to this area? By default all are allowed."
- Recurring Fees:** A link labeled "Select Recurring Fees" with a placeholder "What Recurring Fees should have access to this area? By default none are selected."
- Unit Status:** Radio buttons for "All Units" (selected) and "Only Active Units".
- Active:** A checkbox labeled "Active" with a "Yes" button next to it.
- Integration Mode:** Radio buttons for "Daxko Hosts The Form" (selected) and "Custom".

A red box highlights the "Integration Mode" section. At the bottom right, there are "Cancel" and "Add Virtual Area" buttons.

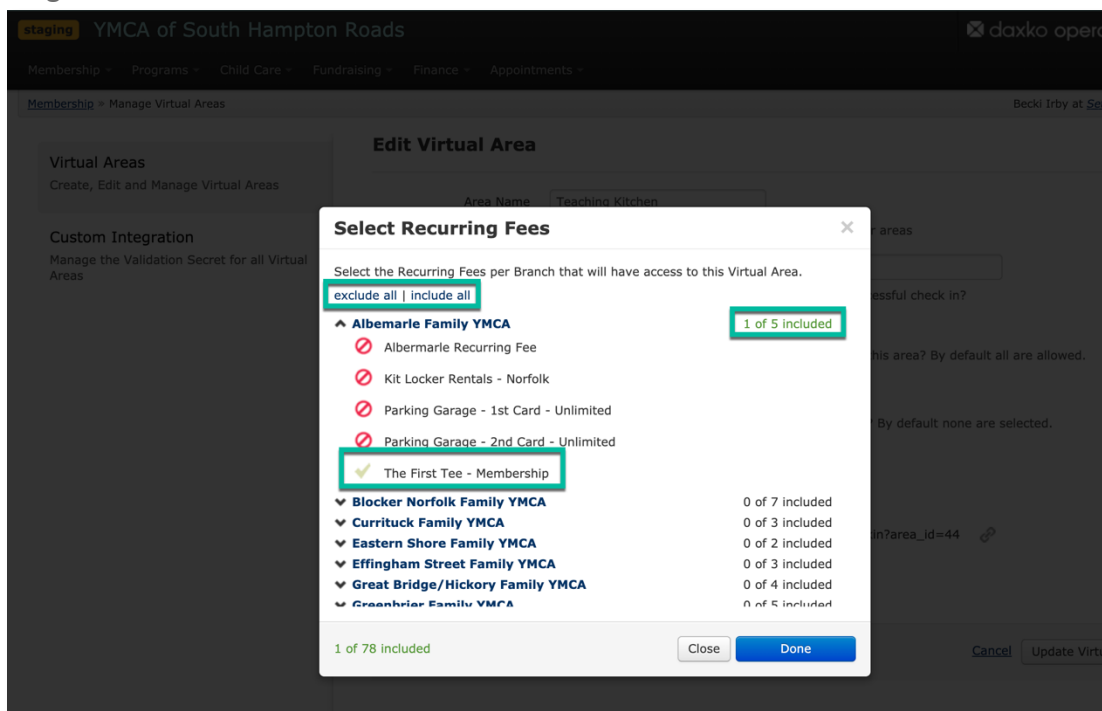


## Daxko Operations: Virtual Areas

The selection of membership types establishes which membership types have access to the content within this area. Users will be able to set up valid membership types across all branches. Options to include all or exclude all will assist associations in the time required to implement the preferred rules.



The recurring fees selection is optional, and allows an association to create an additional requirement that the valid membership types must also have a specific recurring fee in order to have a successful virtual check in. The same include all and exclude all actions are available for recurring fees.



## Integration Options

When creating a virtual area, users select one of two integration modes:

- Daxko Hosts The Form – This option requires minimal web development, as Daxko Operations provides a link on the list of virtual areas for embedding a Daxko Operations webpage containing the barcode validator. This validator will obey the rules set up for each area.
- Custom – Use this option if you want to host the barcode form on your web site and write custom code to handle barcode validation success and failures. In addition to completely controlling the user experience, we provide a way for your developers write code to validate that a URL to a protected area on your web site was not shared with someone else or bookmarked.

The screenshot shows the 'Custom Integration' page for a virtual area. On the left, a sidebar menu has 'Custom Integration' highlighted with a red box. The main content area has a yellow warning banner: 'WARNING The Custom Integration setup for Virtual Areas requires knowledge of web development.' Below this is a 'Validation Secret' field containing the string '3F907C500DB0FBCB21F3ED907B469BB2C4C0C41156BD2638C71E6D2EB7667007' and a 'Generate New Secret' button. A green arrow points to the button. Below the secret is the text: 'The key used for secured validation of the Virtual Area check-in result'. Underneath is the section 'Front-End Development for Check-In Submit' with instructions: 'First, you will need a form submission similar to below. You may customize as you please, but ensure the following: 1. The form submission is a POST 2. The form action URL is the area integration URL that is attempting to be checked in to (Note: this is different for every area) 3. The request must contain: a. "mode" = "custom" b. "barcode" = { entered barcode }'. A code block shows the following HTML: 

```
<form method="post" action="https://staging-ops.daxko-qa.com/online/2014/checkin/submit?area_id=1234">
  <input type="hidden" name="mode" value="custom" />
  Enter Barcode: <input type="text" name="barcode" />
  <button type="submit">Check In</button>
</form>
```

**Note:** The Daxko Support Team will be able to assist associations in navigating to the content a web developer will need to get started. Any website functionality will require associations to consult with a web development team.

For this reason, we have created a technical resource for web developers at <https://github.com/daxko/dax-signature-validation>

For custom integrations, a Validation Secret exists that may be used for all virtual areas by your developers to create a solution to prevent protected URLs from being bookmarked or shared. In order to access this page and generate a new secret, users must have the appropriate permissions.



Generating a new secret will require changes on an association's website, and therefore we include a warning message to make sure the user understands the ramifications.

**Are you sure?**

The Validation Secret is used for **ALL** Virtual Areas using Custom Integration. After Generating a new Secret, ensure you validate check-in results with the new Secret.

Generate Cancel

1. The form submission is a POST
2. The form action URL is the area integration URL that is attempting to be checked in to (Note: every area)
3. The request must contain:
  - a. "mode" = "custom"
  - b. "barcode" = { entered barcode }

```
<form method="post" action="https://staging-ops.daxko-qa.com/online/2014/checkin/submit"
  <input type="hidden" name="mode" value="custom" />
  Enter Barcode: <input type="text" name="barcode" />
```

These custom integration instructions are for your developers and include details on creating a custom virtual check-in experience that also validates that URLs to protected areas cannot be bookmarked or shared.

**Redirect Result**

When we redirect to the given Redirect URL for the provided area, we will include the following parameters in the query string for your validation:

URL Parameter	Description
status	<ul style="list-style-type: none"> <li>"success": member assigned to barcode was found, unique, and passed any possible area restrictions</li> <li>"not_found": member assigned to barcode was NOT found</li> <li>"access_denied": member assigned to barcode was found, unique, but did NOT pass area restrictions</li> <li>"duplicate_barcode": multiple members were found assigned to barcode</li> <li>"invalid": custom integration set for area, but did not get "mode"="custom" in the request OR custom integration NOT set for area and did get "mode"="custom" in the request</li> </ul>
daxExpiration	When the redirect link expires in UTC milliseconds since unix epoch (10 minutes from when the check in is submitted)
area_id	The Area ID where the member is checking in
daxSignature	HMAC SHA256 digest of: <ul style="list-style-type: none"> <li>Input: [daxExpiration]+[status]+[area_id] (in that order) converted to an ASCII byte array</li> <li>key: Your Validation Secret above converted from a Hexadecimal string to a byte array</li> </ul>

**Example:**

```
https://my-ymca.org/this_is_the_redirect_url?status=success
&area_id=0
&daxExpiration=1591662791543
&daxSignature=E4B0EC12C3148BBBCD955E51616A5E028D25D8B03D62B6242CBC973594EBF5F06
```

**NOTE:** You can use the above Redirect Result example to test your implementation of the Server Side Validation below.

The daxSignature was generated with your Validation Secret and:

- status: success
- area\_id: 0
- daxExpiration: 1591662791543



## Event Log

Due to the importance of changes to these new features, we have added six new events:

- Virtual Area Updated
- Virtual Area Validation Secret Updated
- Virtual Area Recurring Fees Included
- Virtual Area Recurring Fees Inclusion Removal
- Virtual Areas Membership Types Exclusion
- Virtual Areas Membership Type Exclusion Removal

staging YMCA of South Hampton Roads daxko operations

Membership - Programs - Child Care - Fundraising - Finance - Appointments -

Tools » Event Log Becki Irby at [Set Branch](#)

Unit Name:  View

Unit ID:

User Name: Becki Irby Clear

Event Type: All

Date Range: 06/08/2020 To: 06/08/2020 Print Export

Date	Event Type	Unit Name	Description
6/8/2020 8:43:20 PM	Virtual Area Validation Secret Updated		Old Value: 3F907C500DB0FBCB21F3ED907B469BB2C4C0C41156BD2638C71E6D2EB7667007, New Value: 224971EFE6D34A430A32C0F0EE9D235F0BB04E1931DA3AE5DE0DBC599DABE31B
6/8/2020 8:41:32 PM	New Virtual Area Created		Area ID: 44, Area Name: Teaching Kitchen, Redirect URL: <a href="https://thecommunitykitchens.org/">https://thecommunitykitchens.org/</a> , Unit Status: 2, Active: True, Integration Mode: 2
6/8/2020 8:20:59 PM	Virtual Area Updated		Area ID: 42, Area Name: Silver Sneakers, Redirect URL: <a href="https://en.wikiquote.org/wiki/The_Lord_of_the_Rings:_The_Return_of_the_King">https://en.wikiquote.org/wiki/The_Lord_of_the_Rings:_The_Return_of_the_King</a> , Unit Status: 1, Active: True, Integration Mode: 1

## Feedback + Questions

Please send an email to [support@daxko.com](mailto:support@daxko.com) if you have questions, concerns, or feedback for our team.

