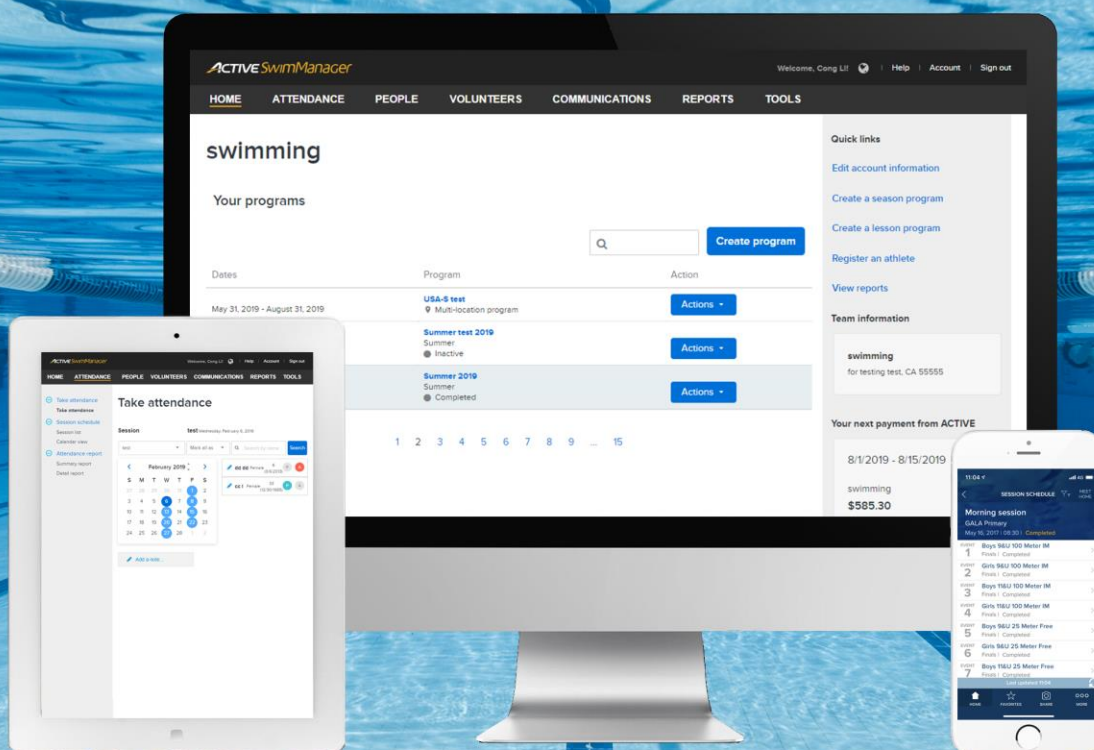




## Product Release Notes for ActiveWorks Swim Manager – April 26, 2020



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## Enhancements

### Program Page Improvements

For better usability, the following enhancements have been implemented in the ACTIVE Swim Manager:

On the homepage, you and your staff can now:

- filter programs by clicking the new **Status** filter and selecting one of the following statuses:
  - **All** (selected by default)
  - **Active**
  - **Registration scheduled** (for programs that are scheduled to open registrations)
  - **Registration closed**
  - **Program completed**
  - **Inactive**

Note: For a multi-location program, if any of its locations matches the selected status, then the program is displayed.

The screenshot displays the ACTIVE Swim Manager interface for the 'swimming' program. The top navigation bar includes links for HOME, ATTENDANCE, PEOPLE, VOLUNTEERS, COMMUNICATIONS, REPORTS, and TOOLS. The main content area shows a list of programs with columns for Dates, Program, and Status. A 'Status' filter dropdown is open, showing options: All, Active, Registration scheduled, Registration closed, Program completed, and Inactive. The table lists three programs: 'Swimming Fall 2020' (Inactive), 'Swimming Summer 2020' (Active), and 'Swimming Spring 2020' (Closed). The right sidebar contains quick links, team information, and the next payment date.

Dates	Program	Status
September 1, 2020 - November 30, 2020	Swimming Fall 2020 Fall	Inactive
June 1, 2020 - August 31, 2020	Swimming Summer 2020 Summer	Active
February 1, 2020 - April 30, 2020	Swimming Spring 2020 Spring	Closed

- archive/hide an inactive program by clicking the required program > **Actions** dropdown > **Archive program** option:



The screenshot shows the 'swimming' page with a navigation bar at the top containing links: HOME, ATTENDANCE, PEOPLE, VOLUNTEERS, COMMUNICATIONS, REPORTS, and TOOLS. Below the navigation bar, the page title 'swimming' is displayed. Under 'Your programs', there is a table with columns: Dates, Program, and Action. The table lists three programs: 'swimming 2020' (Inactive), 'Swimming winter 2019X Winter' (Completed), and 'Swimming lessons winter 2019' (Active). The 'Actions' dropdown menu for the 'swimming 2020' program is open, showing options: Complete program, Manage training groups, Copy program, Archive program (highlighted with a red box), and Remove program. On the right side, there are 'Quick links' and 'Team information' sections.

The screenshot shows the 'swimming' page with a 'Confirm' dialog box open. The dialog box has a title 'Confirm' and a close button (X). It contains the following text: 'Please note that archived programs:' followed by a list of bullet points: 'Will not be displayed on the homepage.', 'Will not be displayed on listing pages.', 'Cannot be registered via the registration link or the parent portal.', and 'Will be listed at the bottom in other program lists (if any).'. Below the list, it asks: 'Are you sure you want to archive this program [swimming 2020] [January 13, 2020]?'. At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Confirm' (highlighted with a red box). The background of the page is dimmed.

Note:

- Only inactive (or deactivated) programs can be archived.
- Archived programs are hidden on the Swim Manager home page and listing pages.
- Consumers cannot register for an archived program via the parent portal.
- unarchive an archived program by clicking the **Archived** button > **Archived programs** popup > required program > **Unarchive** > **Confirm**. The program will then reappear on the homepage in the inactive status:



[HOME](#) [ATTENDANCE](#) [PEOPLE](#) [VOLUNTEERS](#) [COMMUNICATIONS](#) [REPORTS](#) [TOOLS](#)

# swimming

Your programs

Create program Archived

Search here

Status All

View 3 / page

Dates	Program	Action
June 1, 2020 - August 31, 2020	<b>Swimming Summer 2020</b> Summer ● Inactive	Actions
February 1, 2020 - April 30, 2020	<b>Swimming Spring 2020</b> Spring ● Closed	Actions
November 9, 2019 - December 31, 2020	<b>Swimming lessons winter 2019</b> ● Active	Actions

1

2

3

...

15

View 3 / page

Quick links

[Edit account information](#)

[Create a season program](#)

[Create a lesson program](#)

[Register an athlete](#)

[View reports](#)

Team information

swimming

for testing test, CA 55555

Your next payment from ACTIVE

[HOME](#) [ATTENDANCE](#)

# swimming

Your programs

Dates

June 1, 2020 - August 31, 2020

February 1, 2020 - April 30, 2020

November 9, 2019 - December 31, 2020

Your meets

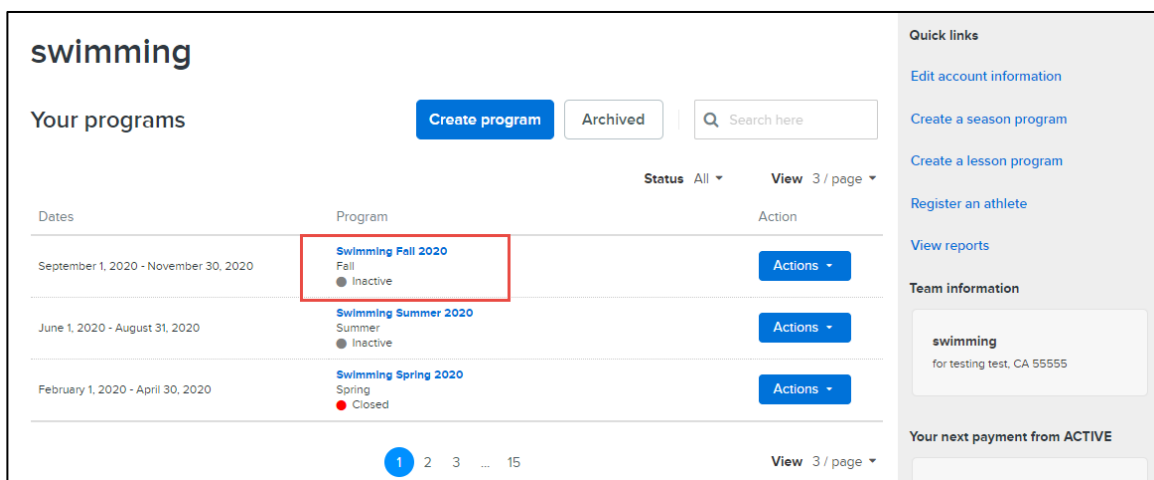
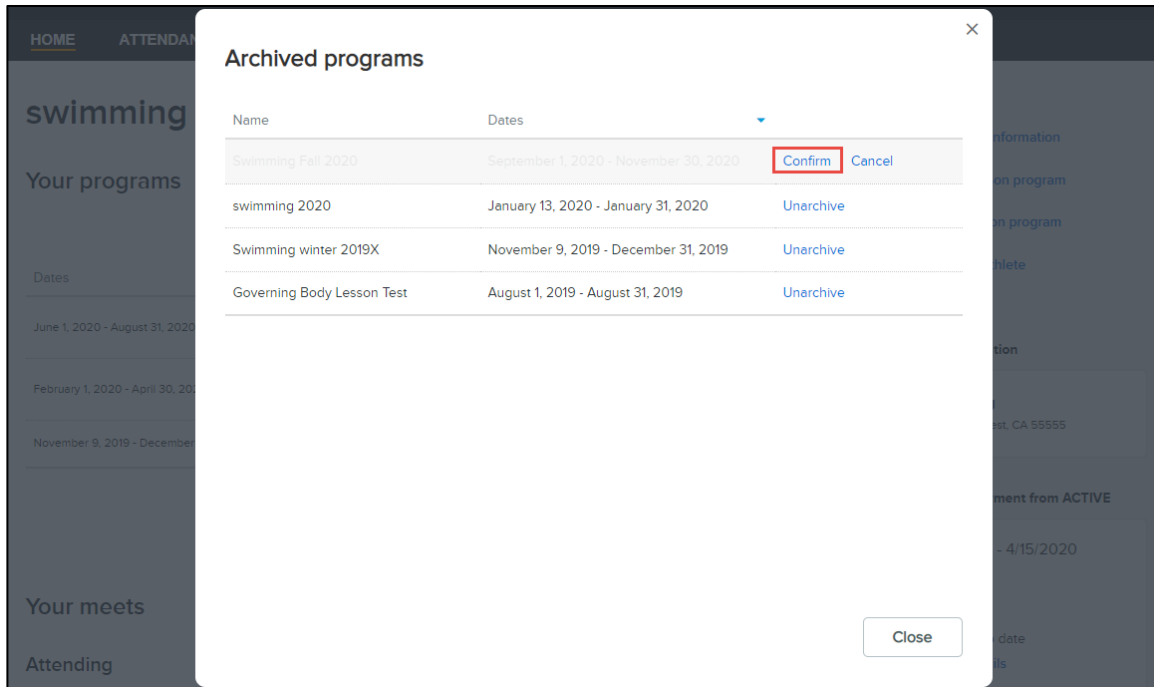
Attending

Archived programs

Name	Dates	
Swimming Fall 2020	September 1, 2020 - November 30, 2020	Unarchive
swimming 2020	January 13, 2020 - January 31, 2020	Unarchive
Swimming winter 2019X	November 9, 2019 - December 31, 2019	Unarchive
Governing Body Lesson Test	August 1, 2019 - August 31, 2019	Unarchive

Close





In addition, when creating an email or text or when linking meets to a program (including importing meets, importing results, creating meets or creating volunteer events/meets), in all relevant filters or popups, non-archived programs are listed first in the following order, followed by archived programs in the same order:

1. programs are primarily sorted by start date, with the most recent start date at the top.
2. programs with the same start date are sorted again by end date, with the most recent end date at the top.
3. programs with the same start date and end date are sorted again by name in the alphabetical order.

## GL Code

Previously, when assigning existing GL codes to products or fees, you (administrators or treasurers) had to double-click the corresponding **Enter GL code** field for the dropdown list of existing GL codes to appear.

Now, the dropdown list of existing GL codes appears after a single click, for example:



## Discounts and fees

### Automatic discounts & fees

Enable the discounts and fees you want to apply automatically when an athlete is registered. This discount will apply to all groups.

Early registration discounts ☐ \$0.00 discount when athletes register by   
Discount must be less than the first billing amount.

Late registration fees ☒ 30.00 fee when athletes register after

GL code   
Additional purchase (333-232-000)  
miscellaneous (333-000-1234)  
Registration (333-232-211-222)

Family discounts ☐ Offer discounts to families

### Coupons

Create a coupon to give discounts when an athlete is registered.

- Registration setup
- Program summary
- Program details
- Groups
- Prices and billing
- Discounts and fees
- Form questions
- Additional purchases
- Waivers
- Confirmation email
- Registration dates
- ACTIVE.com listing

## Email Tool

Previously, in the Email tool, no changes could be saved to an existing email template (any changes to an existing email template had to be saved as a new template).

Now, you and your staff can save changes to an existing template or enter a new template name to save the changes to a new template.

## Saving Credit Card Information During Registration Checkout

Previously, when swimmers with no credit card information on file were added to a meet, agencies were unable to charge them for the OME fees or other miscellaneous fees.

Now, you (administrators or treasurers) can require registrants to save a credit card or eCheck during checkout by checking the Swim Manager > **Account** > **Organization settings** > **Require participants to save a credit card/eCheck during checkout** radio button (defaults to **Yes**), so that your agency can automatically charge meet or miscellaneous fees from swimmers:



**ACTIVE SwimManager** Welcome, Cong Li! | Help | Account | Sign out

HOME ATTENDANCE PEOPLE VOLUNTEERS COMMUNICATIONS REPORTS TOOLS

## Organization settings

### Organization

For security, some fields have been locked.  
\*\* For security reasons, you must [contact your support representative](#) to make any changes.

**Main contact**

Organization name swimming \*\*

**Primary contact**

First name \* Cong

Last name \* Li

Phone number \* 555555 Ext. 5555

Fax number

Processing fee for online registrations ☐ Pass fee on to participants ☒ Absorb fee

Note: Changes to this setting may take up to five minutes to take effect for new order.

Require participants to save a credit card/eCheck during checkout ☒ Yes ☐ No

Note: By selecting Yes, participants will be required to save a credit card/eCheck in order to complete a registration.

Cancel Save

**Account settings**

- Organization
- Agency locations
- Payment accounts
- Custom skin
- Users
- USA Swimming Membership Integration
- GL code

**Frequently asked questions**

- [How do I change my organization name and address?](#)
- [What is the credit card statement name?](#)

Once this requirement is enabled, then in the parent portal, registrants must save a credit card or eCheck during registration checkout in order to complete a registration:



CHOOSE PARTICIPANT

SELECT GROUP

COMPLETE FORM

CHECKOUT

## Review cart & check out

ORDER DETAILS

[+ Add Another Registration](#)

ITEMS	TOTAL
Swimming Fall 2020 registration Athlete: Dora White Group: Group1 <a href="#">Edit</a>   <a href="#">Remove</a>	\$200.00
Late Registration Fee	\$30.00
Deposit Fee	\$50.00

Coupon code

[APPLY](#)

Subtotal  
Total  
Active Network, LLC will charge the amount above

\$280.00  
\$280.00

## CHECK OUT

PAYMENT INFORMATION

swimming requires all of its participants to save a credit card/eCheck for future meet fees or miscellaneous fees charged by the agency.

Please choose a credit card.

☒ \*\*\*\* 4113 11/2024

CVV/CVC \*

☐ \*\*\*\* 4061 10/2025

☐ Add a new credit card

Note: for registrations with a zero checkout payment (for example, a free-of-charge order), registrants will not be required to save a credit card or eCheck.

## Miscellaneous

In the Swim Manager:

- When you or your staff process a refund (such as canceling an order or transferring a registration), if your agency has exceeded the refund limit, then an error message is displayed with a link to the [REFUND LIMIT REACHED -ACTIVEWORKS SWIMMING](#) help article.
- Your user preferences for the homepage > **View** page number (a previously-released feature) and the above **Status** filter are remembered for future sessions until you change the settings, clear the browser cache or change to a different browser.





## Resolved Issues

- Previously, agencies were unable to import .SD3 results files with a missing AgeOrCalss(64-66) field into AWS programs. This issue has been resolved in this release.



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For more information about ACTIVE Network, LLC products and services, please visit [ACTIVEnetwork.com](https://ACTIVEnetwork.com).

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