



ACTIVE Works Swimming Technical Release Notes

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ACTIVE Network, LLC

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About ACTIVE Network, LLC

ACTIVE Network, LLC is a technology and media company that helps millions of people find and register for things to do and helps organizations increase participation in their activities and events.

For more information about ACTIVE Network, LLC products and services, please visit ACTIVEnetwork.com.

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1. Enhancements

1.1 Email Tool Enhancements

For better usability, the Email tool has been enhanced as follows:

- Previously, when adding email recipients by importing a CSV file, if the CSV file contained a recipient's non-primary email (instead of his/her existing primary email in the system), then the email would only be sent to the primary email address. Now, the email is also sent to non-primary email addresses in the imported CSV file.
- For email addresses that are imported from a CSV file, the unsubscribe link in the sent emails now functions correctly. Once recipients click the unsubscribe link, they will no longer receive any emails.

1.2 Transfer to Group Enhancements

To reduce confusion when transferring a swimmer to a new group, the **People** > an athlete > a registration > **Transfer** workflow has been enhanced as follows:

- On the **Transfer** page, the previous **Fully refund current group, then recharge the full price for transfer to group** option has been replaced by a new **Transfer options** section with the following options:
 - **Turn on proration:** when this option is selected, the current group is partially refunded and then the prorated price of the new group is charged. For example, when transferring from Group A (\$100) to Group B (\$200) halfway through a billing cycle, the consumer is refunded \$50 (half of the Group A price) and then charged \$100 (half of the Group B price).
 - **Turn off proration:** when this option is selected, the current group is fully refunded and then the full price of the new group is charged. For example, when transferring from Group A (\$100) to Group B (\$200) any day before the next billing cycle, the consumer is refunded \$100 and then charged \$200.
 - **No refund/charge for this transfer** (not available for waitlist transfers): when this option is selected, there is no refund or charge at the time of the transfer. The price of the new group will be charged from the next billing date and all discounts will be carried over by default.

Transfer Lee Alexander

Program Swimming lessons winter 2019
Saturday, November 9, 2019-
Thursday, December 31, 2020
for testing test, CA 55555

Transfer from Session3 - sss
Status Open
Payment Type Pay in Full
Price \$30.00

Transfer to Select a session

session2 ^

NAME	CAPACITY	PAY IN FULL PRICE	BILLING SCHEDULES
<input checked="" type="radio"/> t1	1/1 available	\$100.00	--

☒ Pay in full \$100.00 Total

Session3 v

Transfer options ?

☒ Turn on proration

☐ Turn off proration

☐ No refund/charge for this transfer. New price will be charged starting from the next billing date

Additional options

☐ Apply additional or transfer fee of \$

☒ Send confirmation email when transfer to other group

Cancel

Continue to review page

- In the **Transfer** page > **Additional options** section, a new **Send confirmation email when transfer to other group** checkbox has been added (checked by default). If this checkbox is checked, then a confirmation email is sent to the parent (or swimmer) when the swimmer is transferred to a new group:

Transfer Lee Alexander

Program Swimming lessons winter 2019
 Saturday, November 9, 2019-
 Thursday, December 31, 2020
 for testing test, CA 55555

Transfer from Session3 - sss
Status Open
Payment Type Pay in Full
Price \$30.00

Transfer to Select a session

session2			
NAME	CAPACITY	PAY IN FULL PRICE	BILLING SCHEDULES

Additional options ☐ Apply additional or transfer fee of \$

☒ Send confirmation email when transfer to other group

Cancel

Continue to review page

- If the new group is on a billing schedule, then in the **Confirm transfer** page > **Transfer summary** section, a **Next billing date and estimated amount** field is now displayed under the **Updated order balance**:

Confirm transfer for Lee Alexander

Transfer summary

ITEMS	PRICE
TRANSFER FROM	
Session: Session3 - sss	\$2.39
Subtotal	\$2.39
TRANSFER TO	
Session: Session3 - sss	\$2.86
Transfer from: Session3 - sss	
Swimming lessons winter 2019 registration	
Athlete: Lee Alexander	
Transfer Fee	\$10.00
Processing fee	\$6.00
Subtotal	\$18.86
Retained order lines	\$55.37
Original amount paid by customer	-\$84.76
Updated order balance	-\$2.86
Next billing date and estimated amount	7/8/2020 \$20.00

- If the order for the current registration has an eCheck payment method saved on file and the transfer generates a charge (or is on a new billing schedule), then in the **Confirm transfer** page > **Payment information** section, an **eCheck** option is displayed with a list of saved eCheck accounts. Agency users can select an existing eCheck account to pay for the transfer or the billing schedule:

Confirm transfer for Lee Alexander

Transfer summary

ITEMS	PRICE
TRANSFER FROM	
Session: Session3 - sss	\$13.39
Transfer from: session2 - t1	
Swimming lessons winter 2019 registration	
Athlete: Lee Alexander	
<hr/>	
Original amount paid by customer	-\$84.76
<hr/>	
Updated order balance	-\$2.86
<hr/>	
Next billing date and estimated amount	7/8/2020 \$20.00

Please select an option for future billings * ⓘ

☒ Bill me automatically

Payment information

An additional fee is charged to your organization for each transaction. All fees are processed in the next payment period, and are deducted from the total amount paid to your organization.

☐ Credit/Debit card

☒ eCheck

Please choose an account

☒ Account number ending in 5819

1.3 Training Group Enhancements

On the **Home** > a program > **Actions** > **Manage training groups** > **Add / remove athletes** popup, to allow agency users to filter swimmers by a specific training group (registration group) or billing group, the following enhancements have been implemented:

- A new **Billing group** filter has been added, which lists groups and sessions under the current program (**All** is selected by default).
- The previous **Group** filter label has been changed to **Assignment status**:

Manage training groups

Program

[+ New training group](#)

111
test

Gender

Female & Male

Age

No min - No max

Assignment status

All

Billing group

All

☐ Last name First name Age(birthday) Gender Bill

☒ yang zhou 30 (1/4/1990) Female Ses

☐ Yang Guo 21 (10/25/1998) Male Session2 test

☒ Yang Lela 18 (10/17/2001) Female Session3 111

2. Resolved Issues

No issues were resolved in this release.