ACTIVE works®

Product Release Notes for ACTIVEWorks Swimming – January 9, 2020
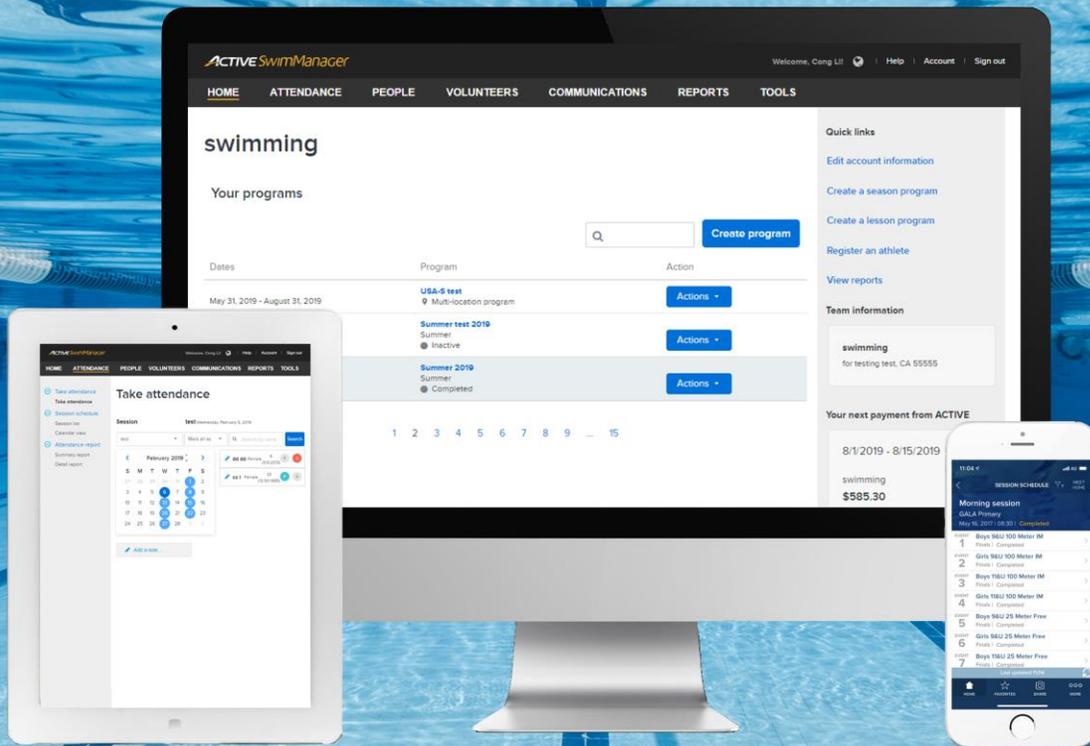
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New Email Tool

To provide you and your staff with more customization of your email communications, more precisely targeted recipients and richer contents, a new email tool is now available in the ACTIVE Swim Manager AUI.

Locations:

- **COMMUNICATIONS** tab > **Create an email** button
- **VOLUNTEERS** tab > a meet/event > **Email reminder** link
- **ATTENDANCE** tab > **Session schedule** > **Calendar view** > **Day** tab > a scheduled session > **Email** link

The new email tool contains the following three steps:

Step 1: Email information

You can now edit the sender name and reply email address by clicking the **From** > ✎ icon.

For email recipients, you can directly enter email addresses (separated by commas) in the **Recipients** text box or select recipient lists by clicking **Add**. In the dropdown list, pre-configured **All contacts**, **Primary contacts**, **Swimmers**, **Past Due** and **Balance Owed** recipient lists are available.

You can also select the **Custom filter for participants...** option to filter a custom group of recipients by:

- All or selected **Program**, **Meet** or **Session**
- **Contact type: Parents, Athletes** and/or **Secondary contacts**
- **Gender** or **Age** (for athletes only)
- **Payment status**: **Past due** or **Balance owed**
- Range of **Registration dates**

You can name and save a custom filter for future use by selecting the **Save this filter** checkbox and entering an optional filter name:
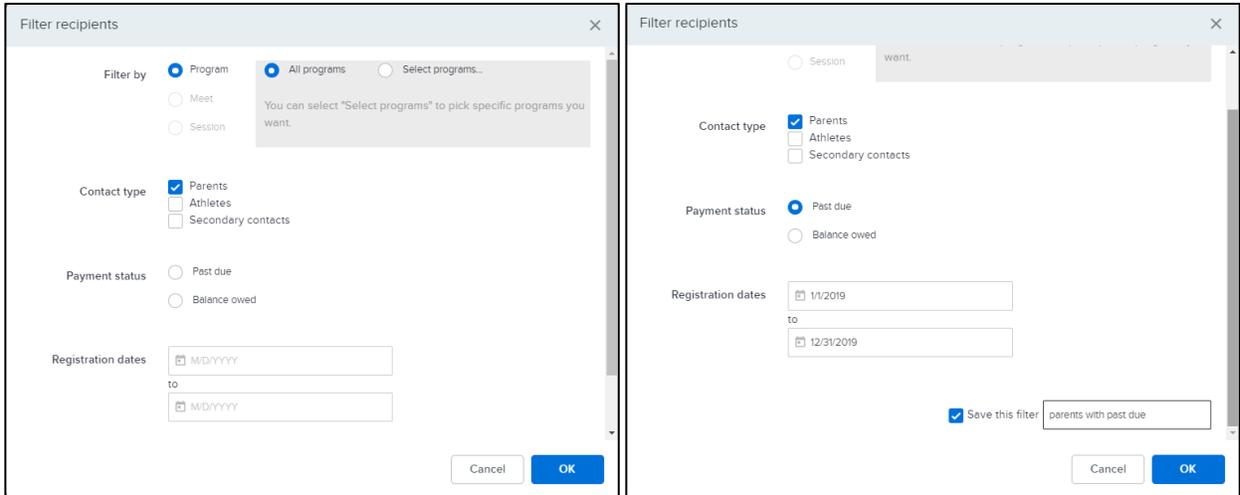
You may also import a list of recipients from a CSV file by selecting the **Import CSV** option:
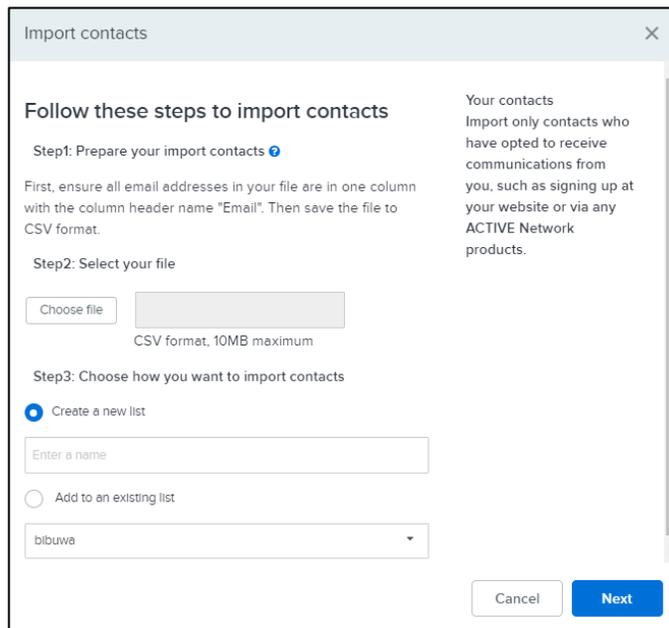
If you wish to add a saved custom filter to the email recipients list, then you can click the **Select from saved lists…** option and select the required filter:
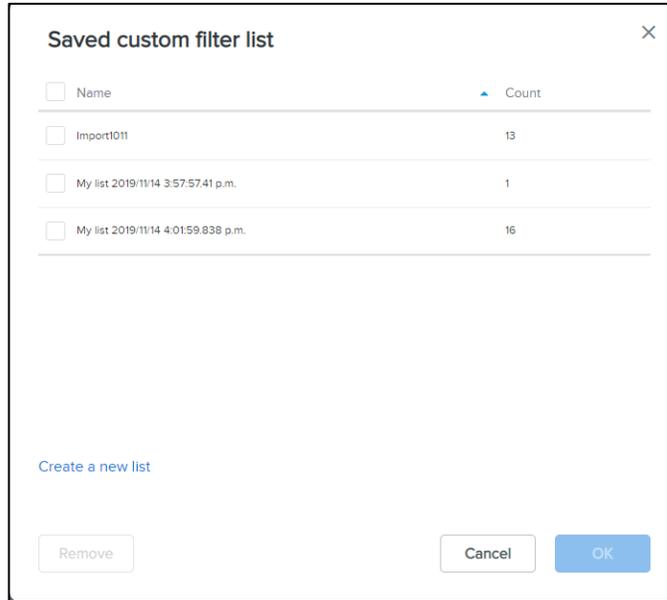
After adding recipients, you can review and adjust the final recipient list by clicking the **View all** link and then selecting or deselecting recipients as required. To sort the list, click the **First Name**, **Last Name** or **Email** column header:

Note:

When sending emails from the **ATTENDANCE** or **VOLUNTEERS** tab, the recipients list is automatically pre-filled with participants attending or volunteering in that specific session (including both genders and all ages):

After setting up the required email information, click **Continue** to proceed to the **Design** step.

<u>Step 2: Design</u>

In this step, you can either select an existing template or create a new design for the email.
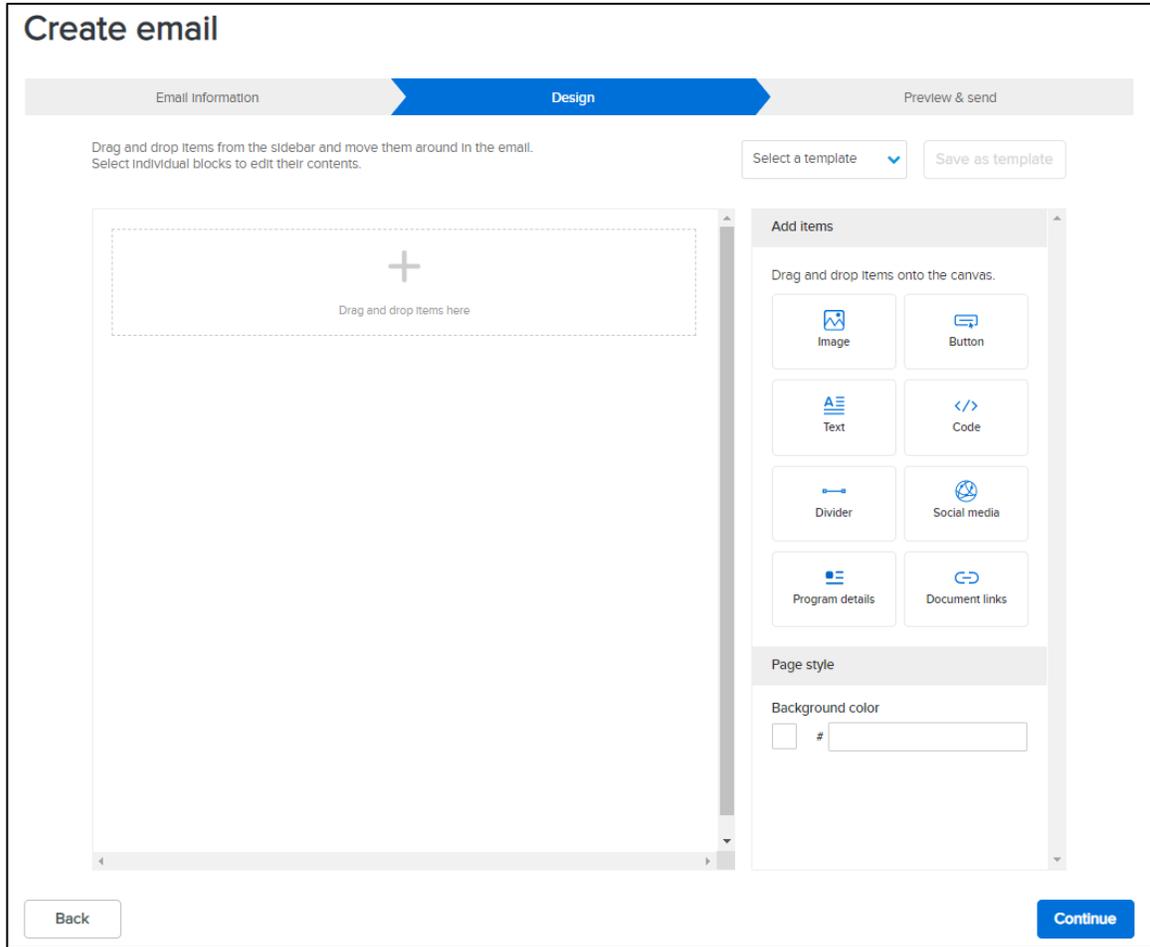
To use a default or a saved custom template, click **Select a template** > the required template.
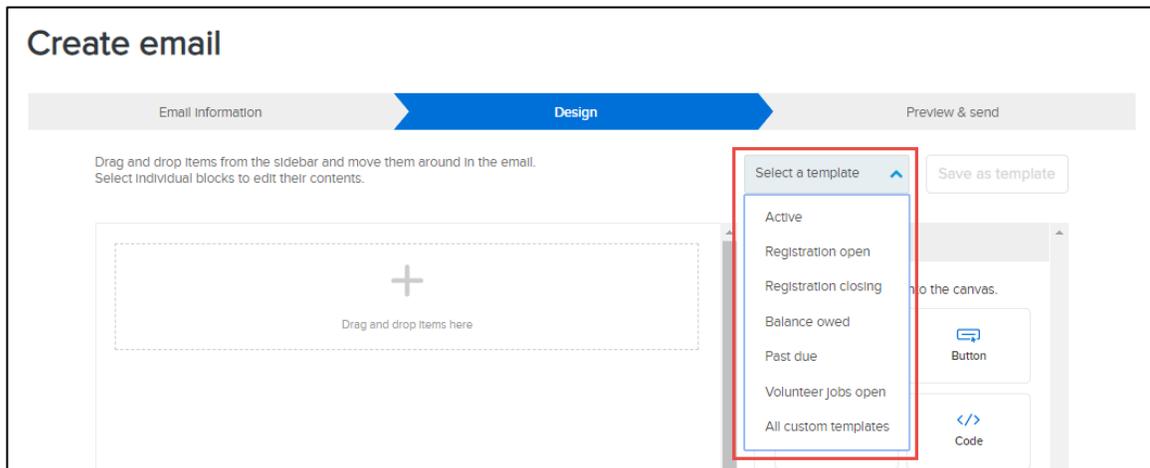
The following default templates are available:

- **Active**
- **Registration open**
- **Registration closing**
- **Balance owed**

- **Past due**
- **Volunteer jobs open**

Note:

- Legacy custom email templates have been migrated to the new email tool and are available under **All custom templates**.
- The **Active** template now includes the ACTIVE logo, program details, a registration button, text and a swimming image:
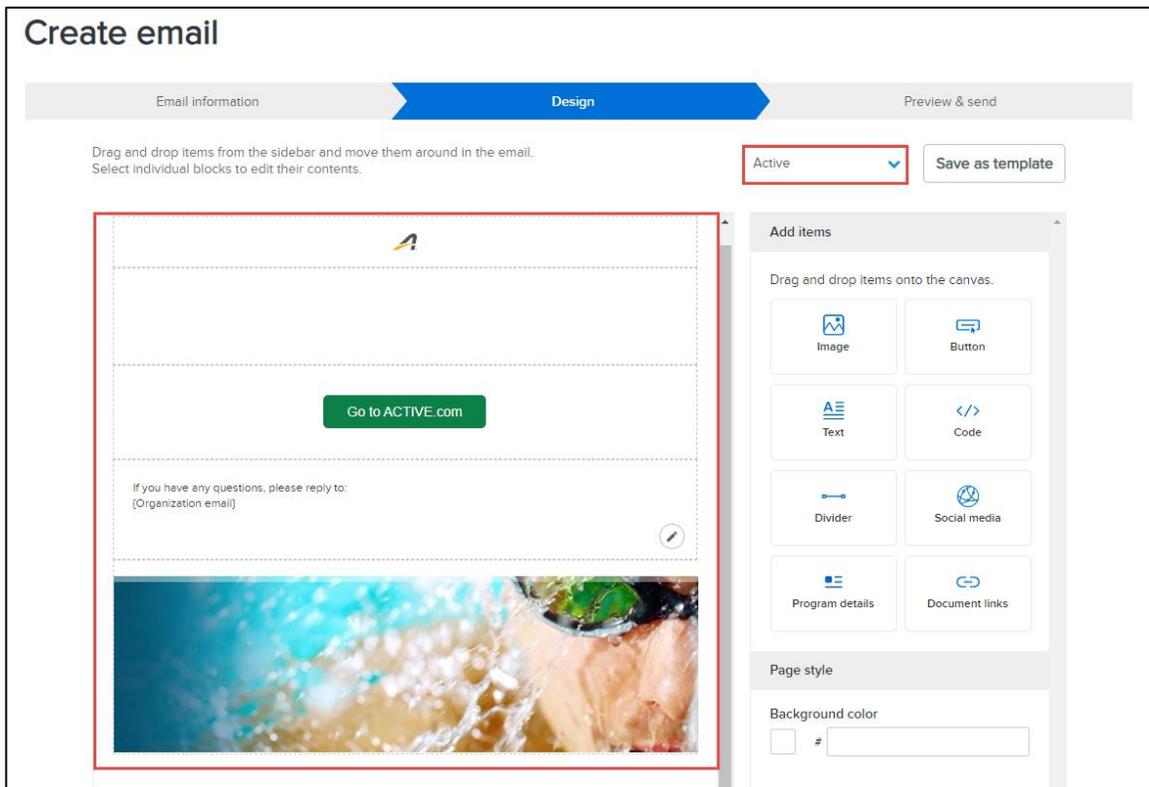

- Both **Active** and **Volunteer jobs open** templates now includes a new {Organization email} variable field to dynamically insert the email address configured in **Account** > **Organization**:
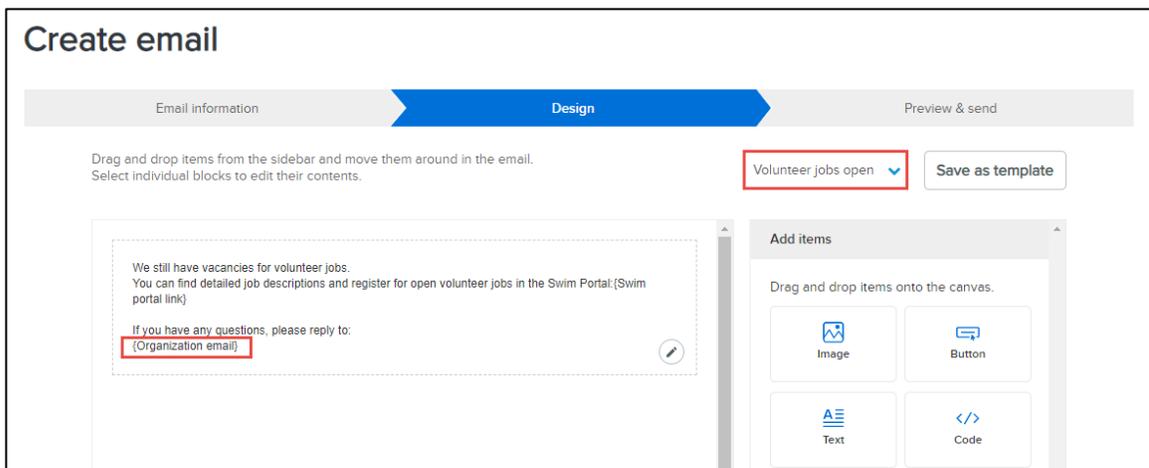
To create a new design, you can drag-and-drop the required **Add Items** > **Image**, **Button**, **Text**, **Code**, **Divider**, **Social media**, **Program details** and **Document links** items onto the canvas. For example:
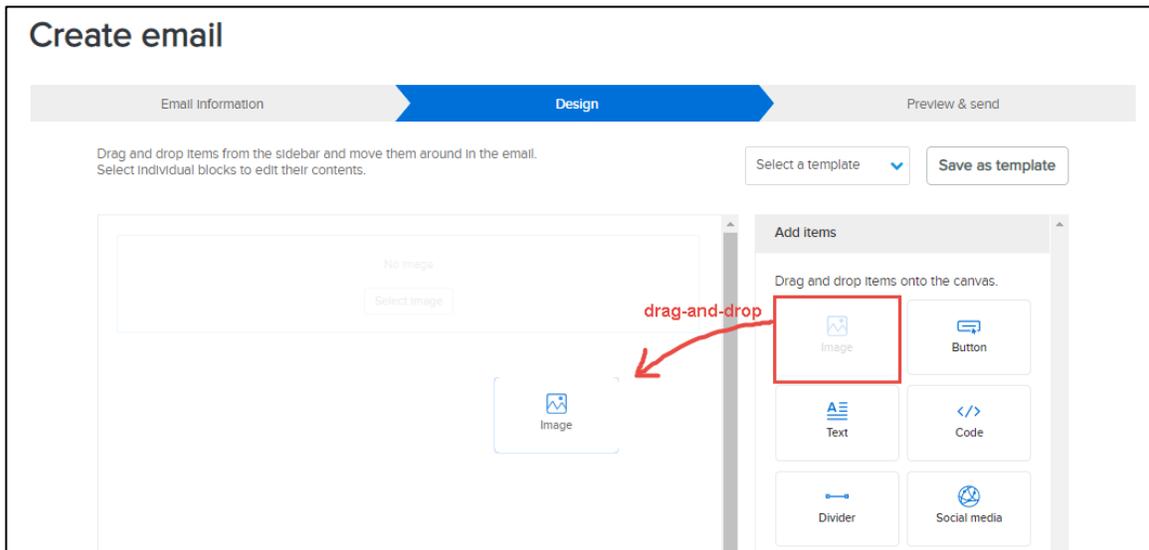
To customize an item's properties, click the required item on the canvas to display its properties in the lower-right corner and then edit the properties as required. For example:
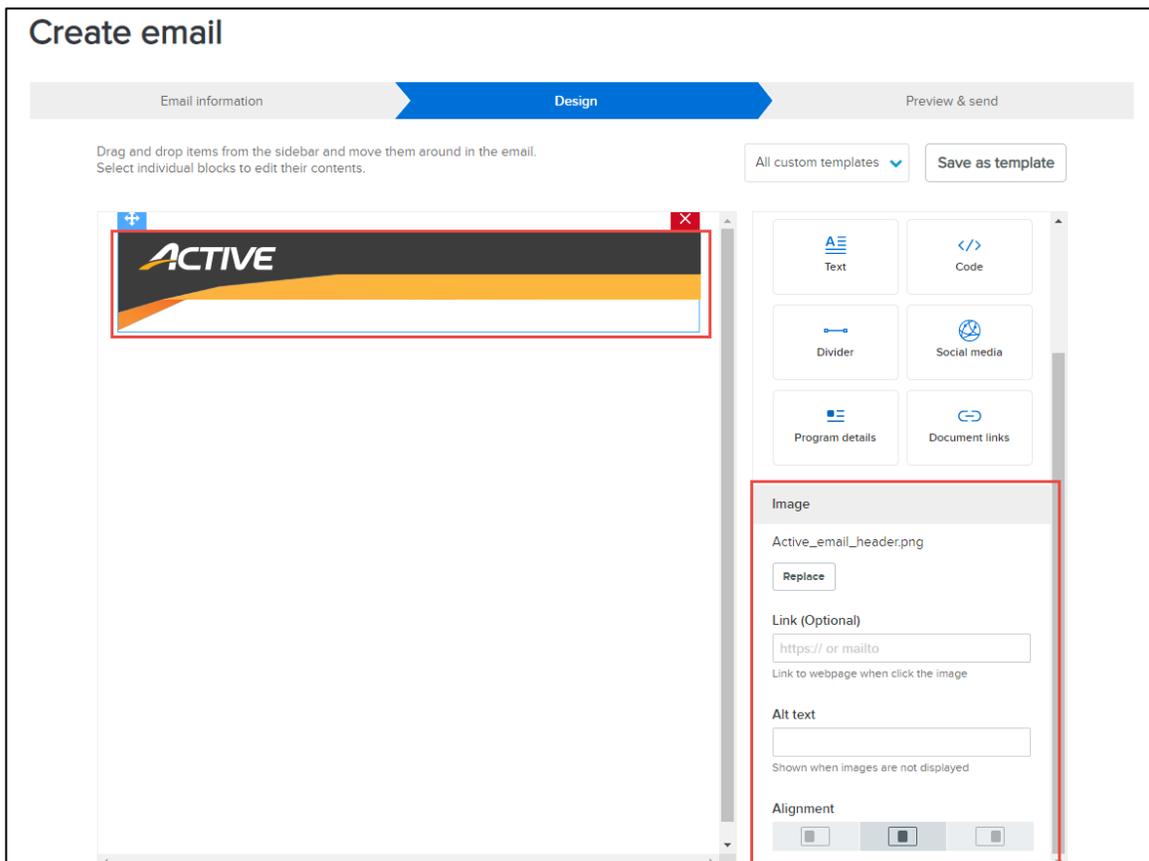

To remove an item from the email canvas, click or hover the cursor over the required item and then click ✕:
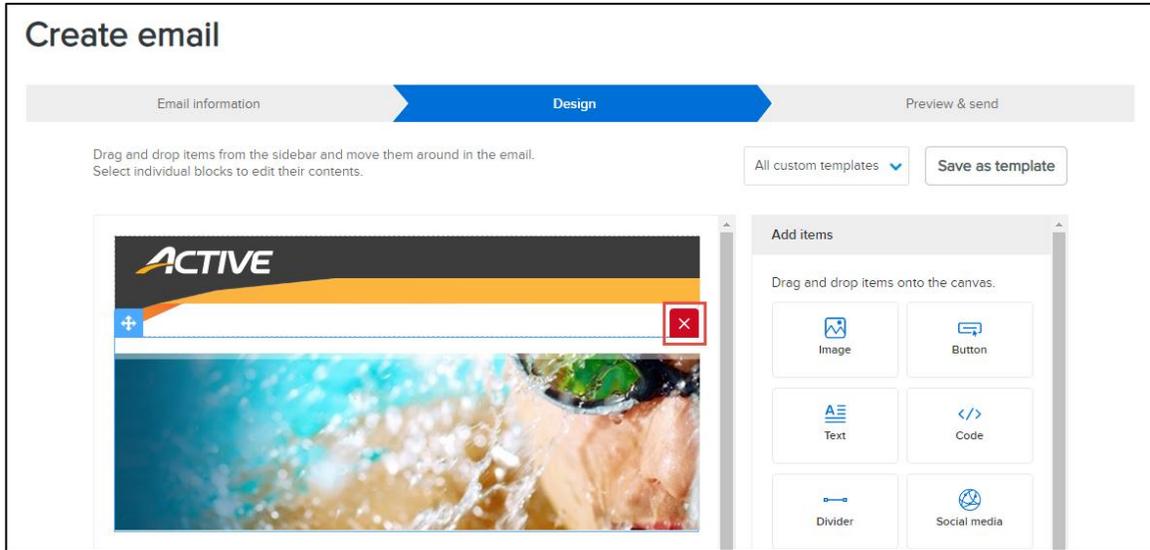
- Adding an image:

    To add an image to the email, drag-and-drop the **Image** item onto the canvas and then click **Select Image**.
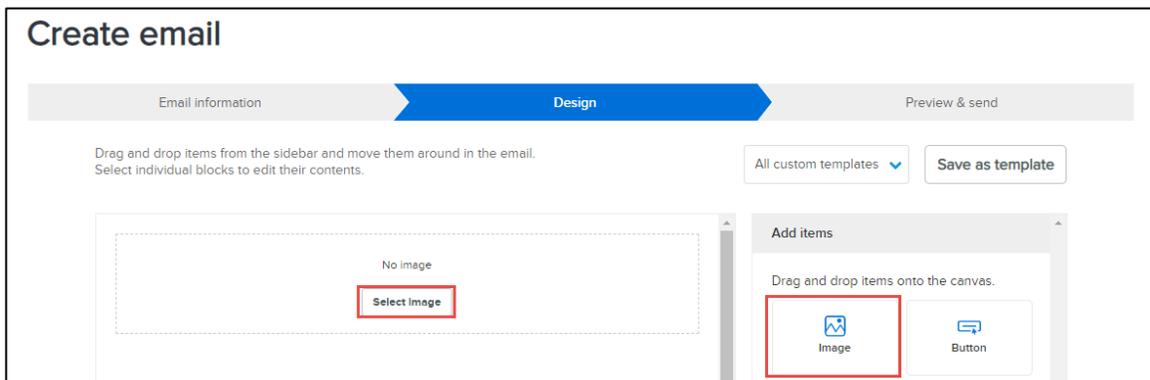

    On the **Select image** popup, search for and select an existing image from the image library or upload a new image by clicking the **Upload new image** button (the image must be in JPG, JPEG, GIF or PNG format and under 2 MB in size).
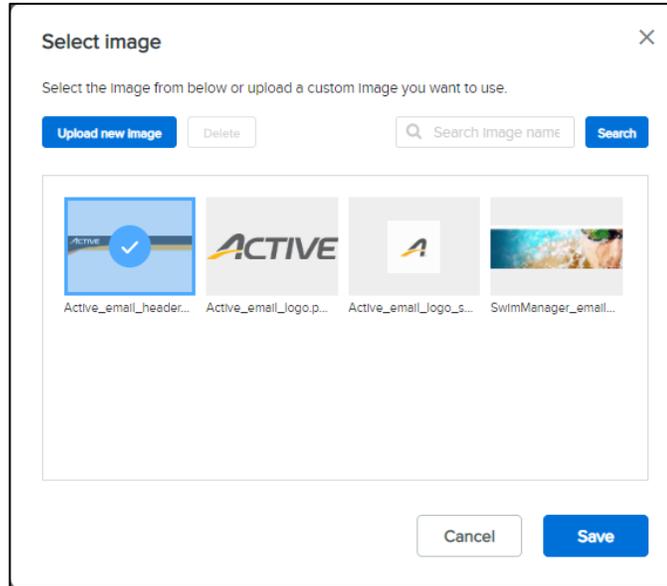
To change an image, hover the cursor over the image and then click **Replace**.
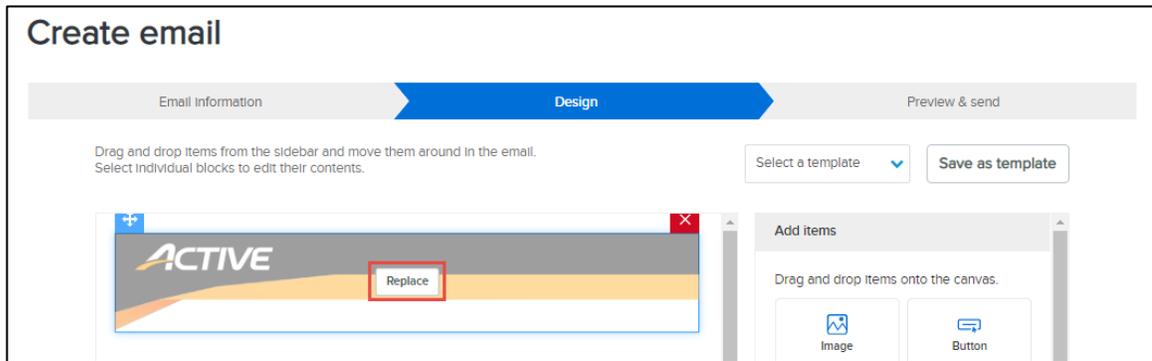
You can then customize the image properties in the lower-right corner:
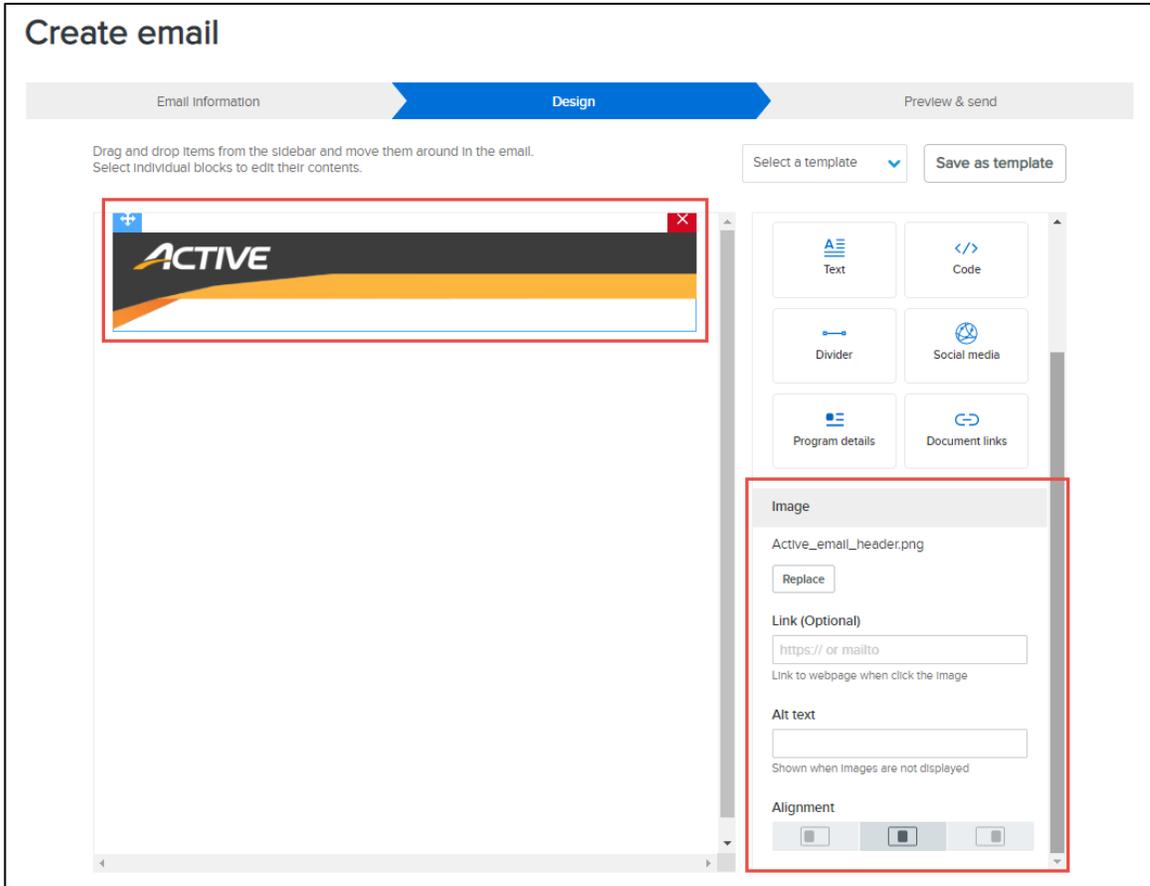
- Adding a button:
  To add a button to the email, drag-and-drop the **Button** item onto the canvas.
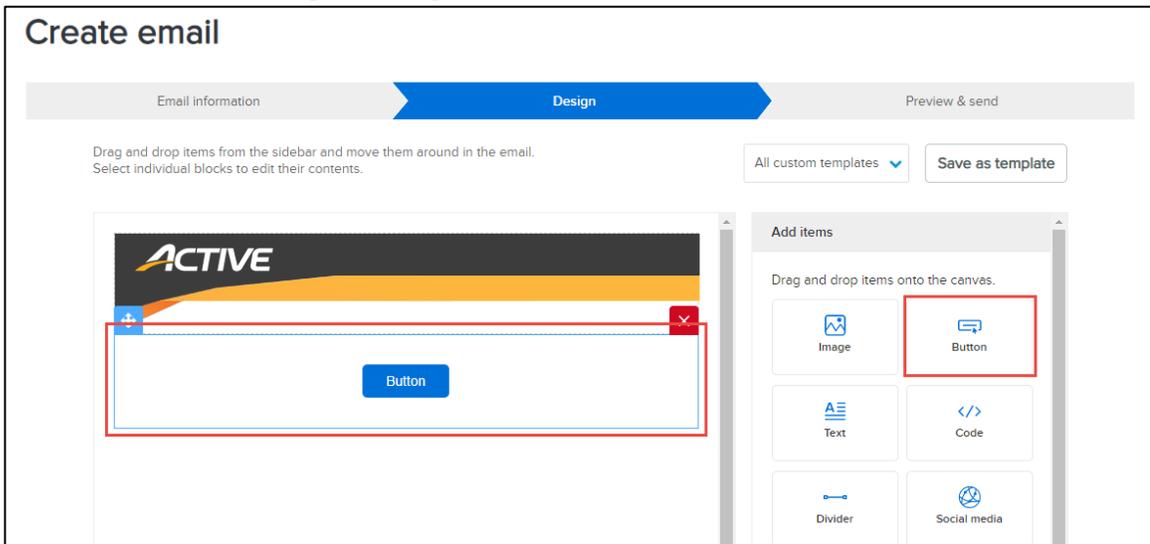
In the button properties section, you can select the required button type from the **Button type** dropdown and then customize its label, color or link as required:

– **Custom link** (you can enter the required link and label):

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–   **Go to ACTIVE.com** (link defaults to https://www.active.com/. Both the link and label are editable):

– **Register a program** (label defaults to "**Register now**" and cannot be edited. A **Select a program** link is displayed for you to select the required program):

Create email

Email information	Design	Preview & send

Drag and drop items from the sidebar and move them around in the email.
Select individual blocks to edit their contents.

Select a template ▼ | Save as template

ACTIVE

⊕   ✕

Register now
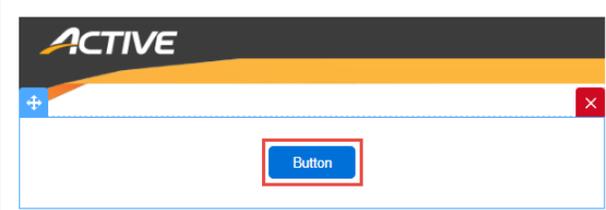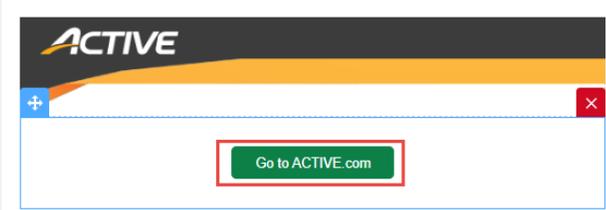
Button

Font
Arial ▼

Text color
☐ # ffffff

Button color
■ # 0070d9

Background color
☐ # ffffff

Corners
☐ ▣

Alignment
▣ ▣ ▣

Button type
Register a program ▼

Link to your program
Select a program

Select a program

✕

Select your program to display its name, date and location

|	Program	Program start date ▲
☑	Swimming Spring 2020 - Primary location	2/1/2020
☐	Swimming winter 2019X - Primary location	11/9/2019
☐	Swimming lessons winter 2019 - Primary location	11/9/2019
☐	swimming Winter 2019 - Primary location	11/2/2019
☐	swimming Winter 2019 - Second location	11/2/2019
☐	swimming Summer 2017 pp test 1 - Primary location	1/1/2018
☐	swimming Winter 2016 USA-S - Primary location	9/30/2016

Close | **Select**

- Adding customized text:
  To add customized text to the email, drag-and-drop the **Text** item onto the canvas and then enter the required text using the full-featured text editor:
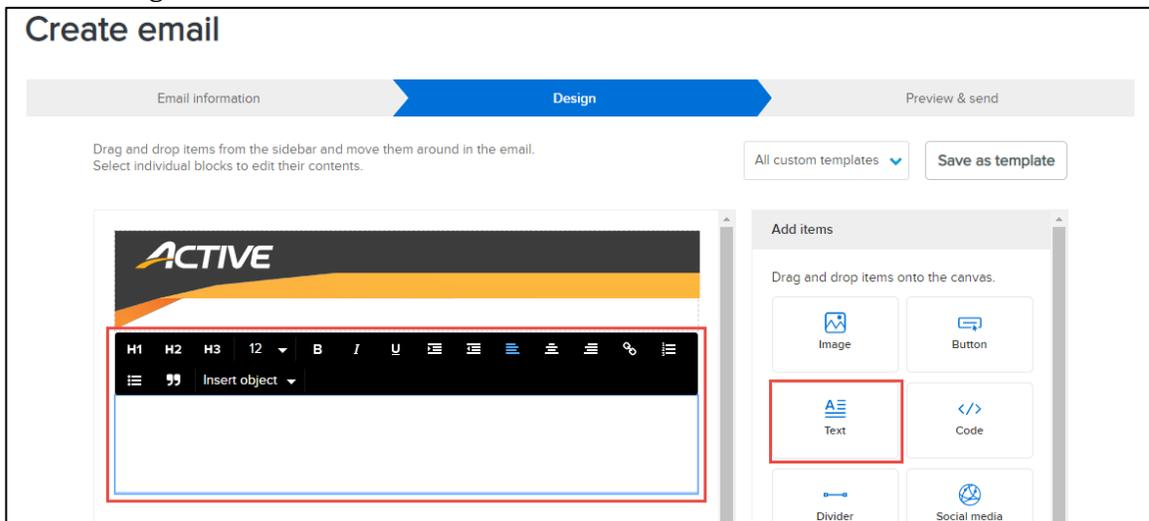
You can insert variable fields including **{Recipient first name}**, **{Recipient last name}**, **{Athlete first name}**, **{Athlete last name}**, **{Swim portal link}** and **{Organization email}** by clicking the **Insert object** dropdown list.
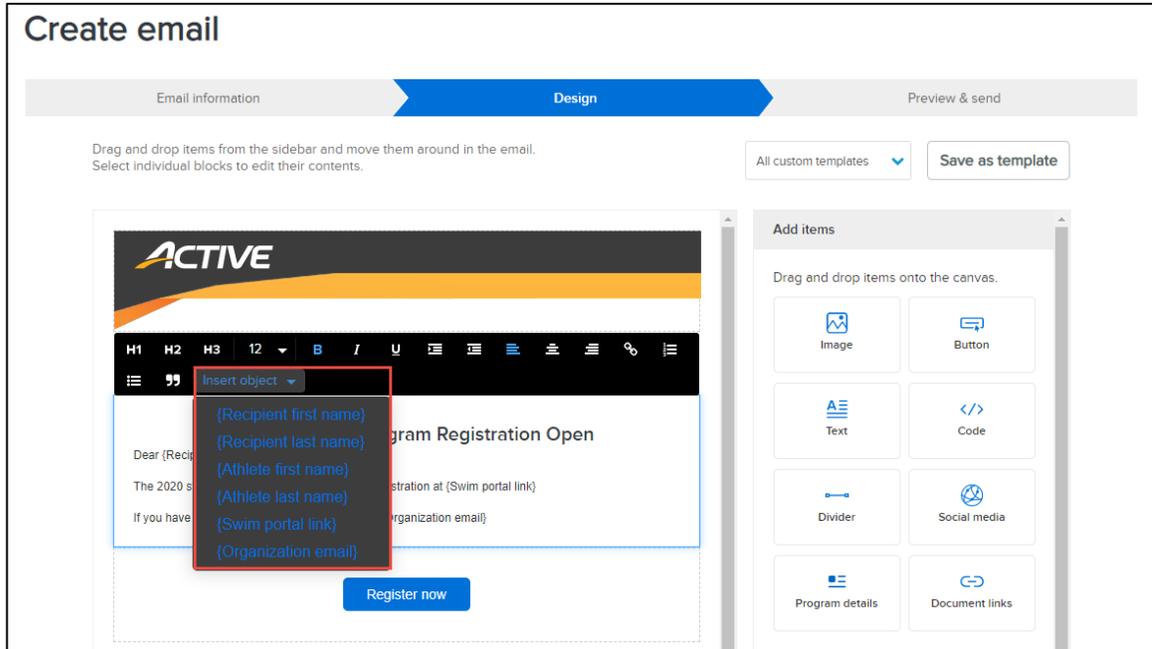
- Adding customized code:

  To add custom HTML code to the email, drag-and-drop the **Code** item onto the canvas and then enter the required HTML code in the code editor in the lower-right corner. After clicking **Update**, a preview of the code is displayed on the canvas.

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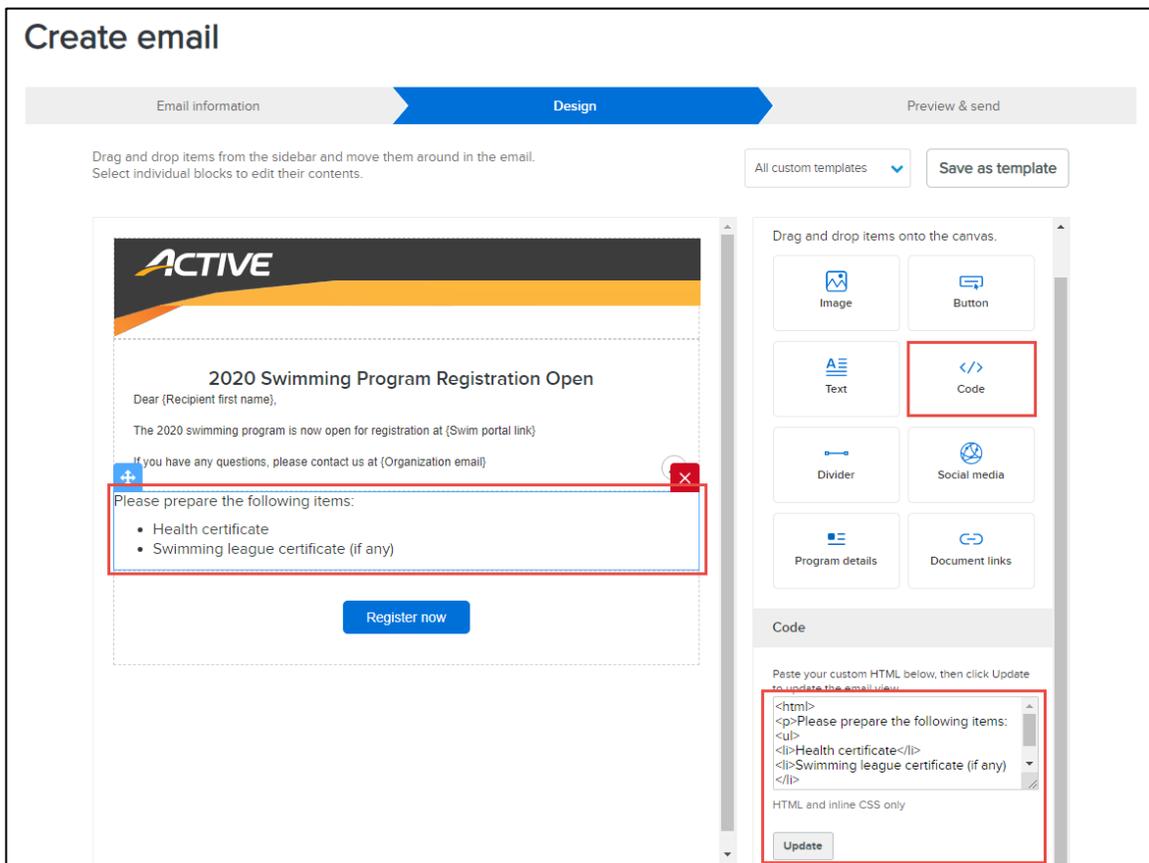
- Adding a divider:

  To add a divider to the template, drag-and-drop the **Divider** item onto the canvas and then drag the divider up or down, or edit its properties (paddings, color and width) as required.
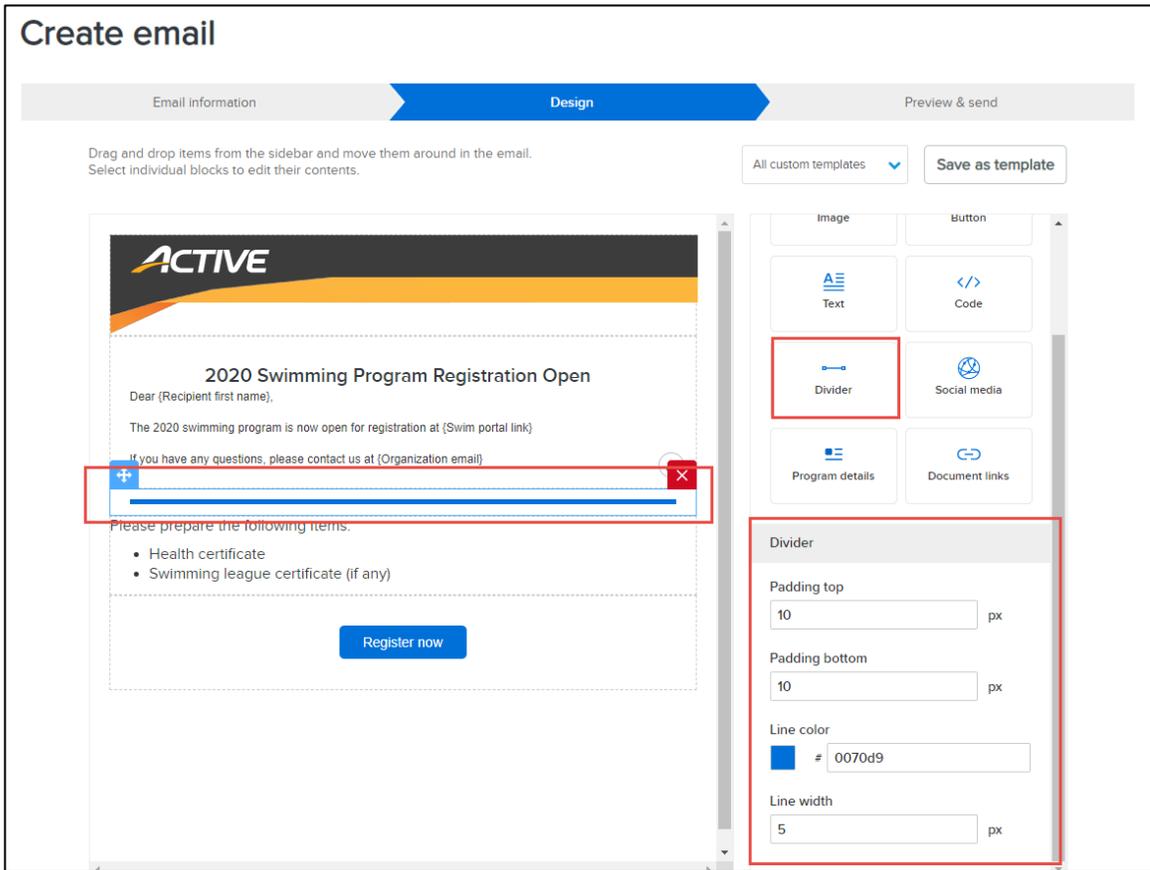
- Adding social media links:

  To add social media links to the email, drag-and-drop the **Social media** item onto the canvas and then enter the required links in the lower-right property section.

  Links to Facebook, Twitter, Instagram and YouTube are supported. You can click **+ Add more** to add up to 6 social media links to the email.

- Adding program details:

  To add details for a specific program (including program name, start date and address) to the email, drag-and-drop the **Program details** item onto the canvas and then click **Select a program** in the lower-right corner > the required program.

Create email

Email information	Design	Preview & send

Drag and drop items from the sidebar and move them around in the email. Select individual blocks to edit their contents.

Active ▼   Save as template

ACTIVE

2020 Swimming Program Registration Open

Dear {Recipient first name},

The 2020 swimming program is now open for registration at {Swim portal link}

If you have any questions, please contact us at {Organization email}

Please prepare the following items:
- Health certificate
- Swimming league certificate (if any)

Register now

Program details   **Document links**

Program details

Font
Arial ▼

Name font size
16 ▼

Detail font size
12 ▼

Text color
333333

Background color
FFFFFF

Alignment

Display program detail

Select a program

Select a program

Select your program to display its name, date and location

Program	Program start date ▲
☑ Swimming Spring 2020 - Primary location	2/1/2020
☐ Swimming winter 2019X - Primary location	11/9/2019
☐ Swimming lessons winter 2019 - Primary location	11/9/2019
☐ swimming Winter 2019 - Primary location	11/2/2019
☐ swimming Winter 2019 - Second location	11/2/2019
☐ swimming Summer 2017 pp test 1 - Primary location	1/1/2018
☐ swimming Winter 2016 USA-S - Primary location	9/30/2016

Close   **Select**

Note: program details are not editable.

- Adding document links:

  To add document links (such as links to waivers or registration forms) to the email, drag-and-drop the **Document links** item onto the canvas and then click **Select files**.
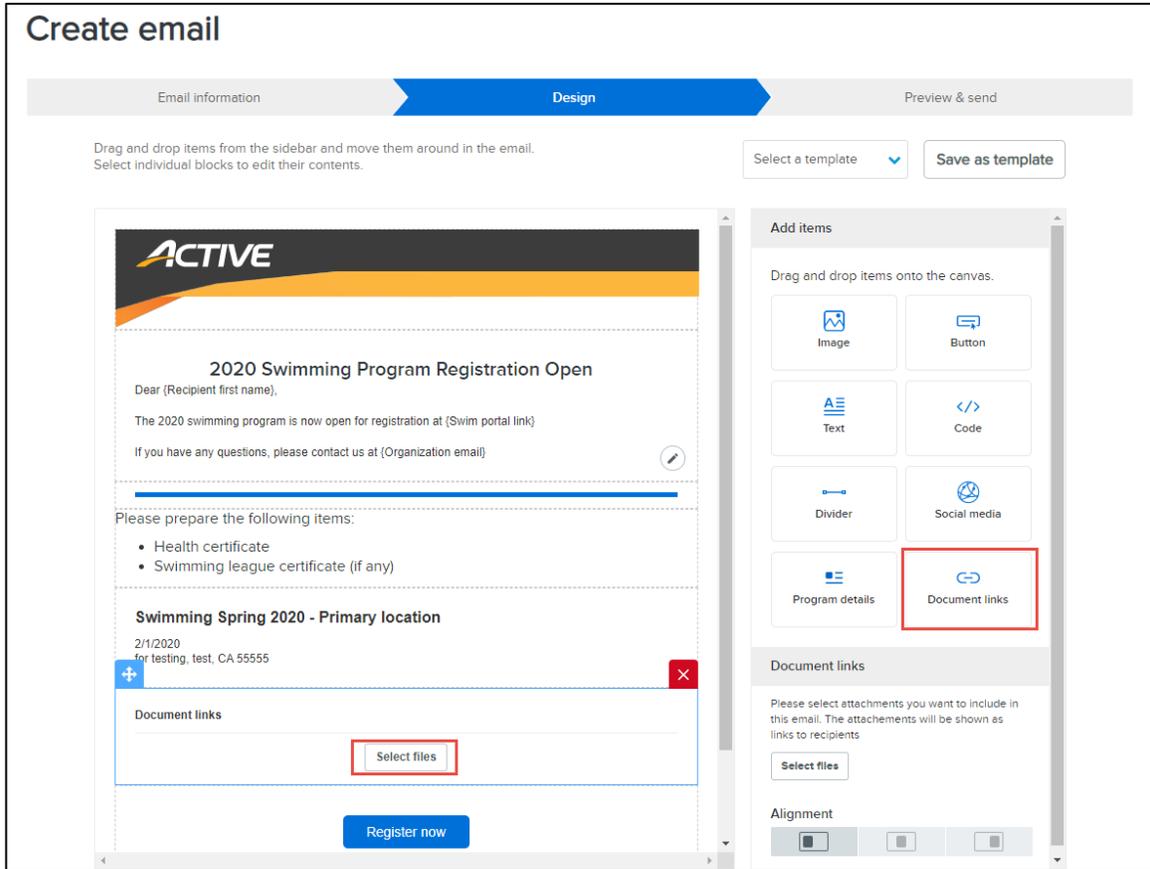
On the **Select files** popup, you can:

- select one or more existing files from the file library.
- upload a new file by clicking the **Upload new file** button (supported file formats include doc, docx, txt, csv, bmp, gif, jpg, jpeg, jpe, png, xls, xlsx and pdf with no size restrictions).
- remove unwanted files from the library by selecting the unwanted files and then clicking **Delete**.
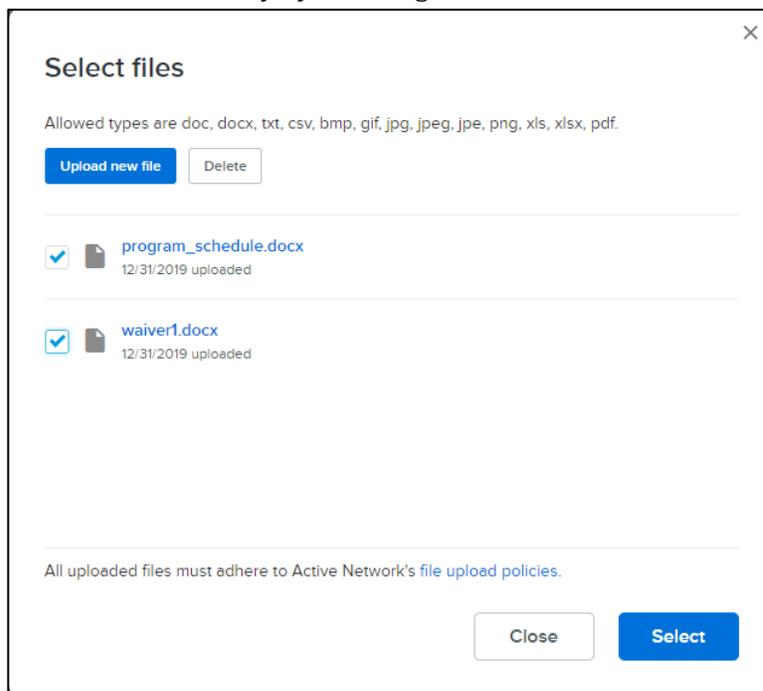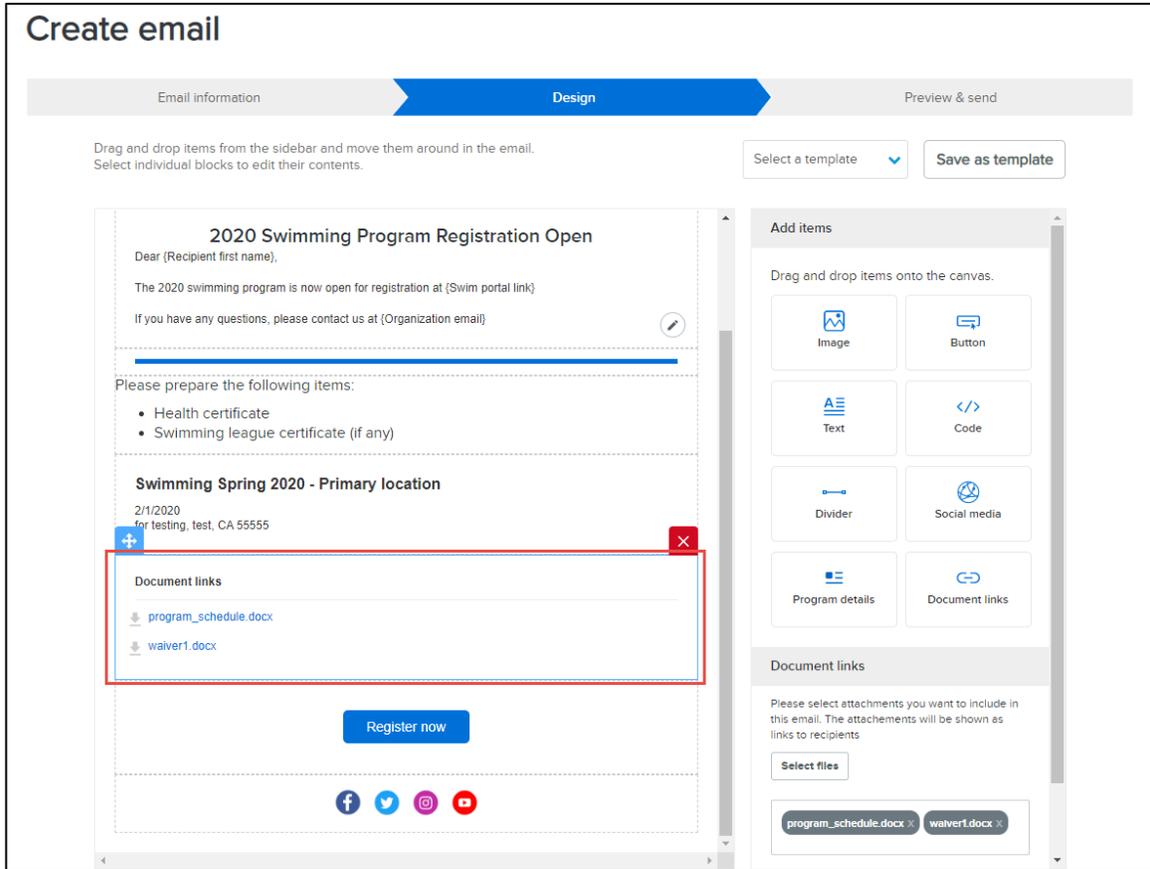
You can then save the customized email as a template for future use by clicking the **Save as template** button (note: the template name must be unique with a maximum length of 20 characters).
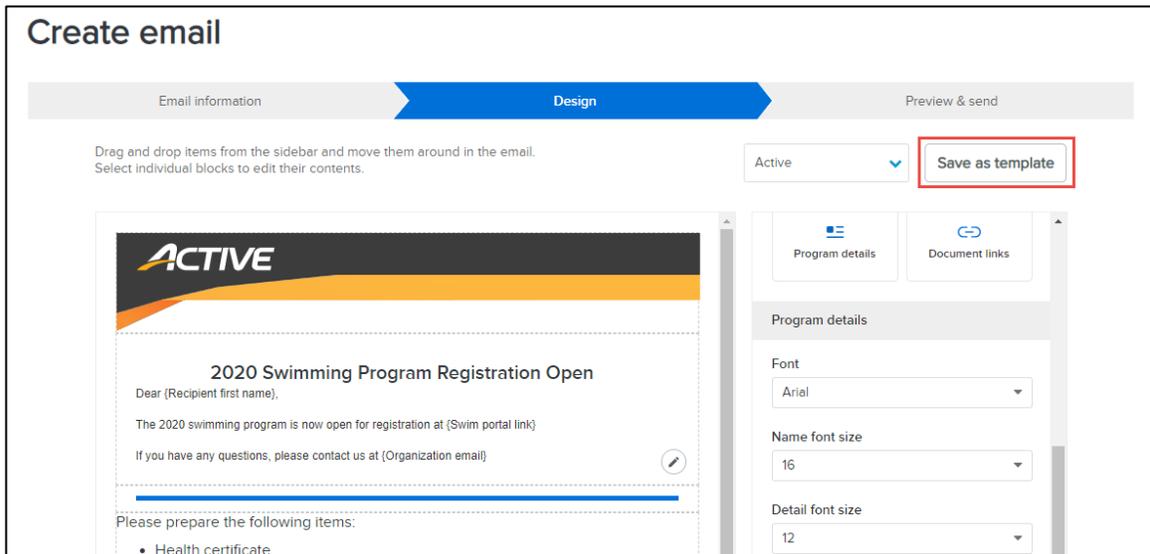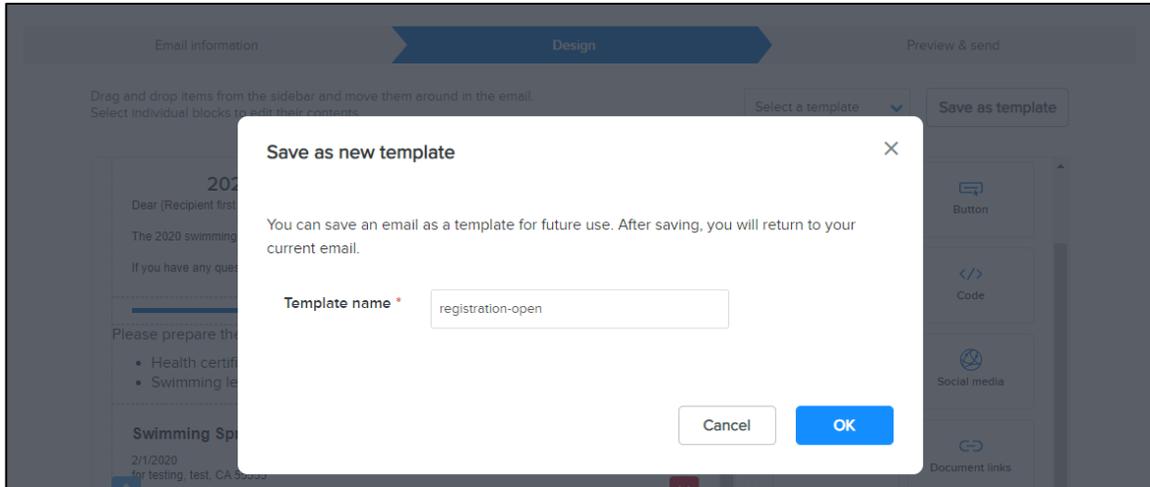
To delete saved custom templates, click **Select a template** > **All custom templates** > the unwanted templates and then click **Delete**.
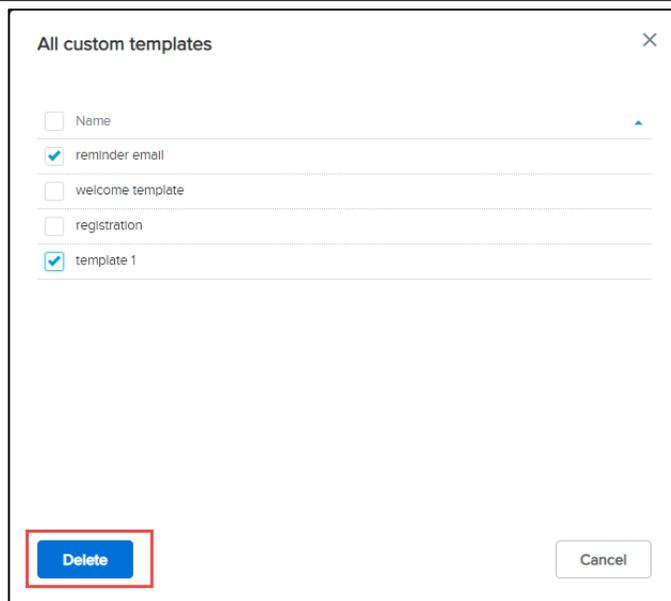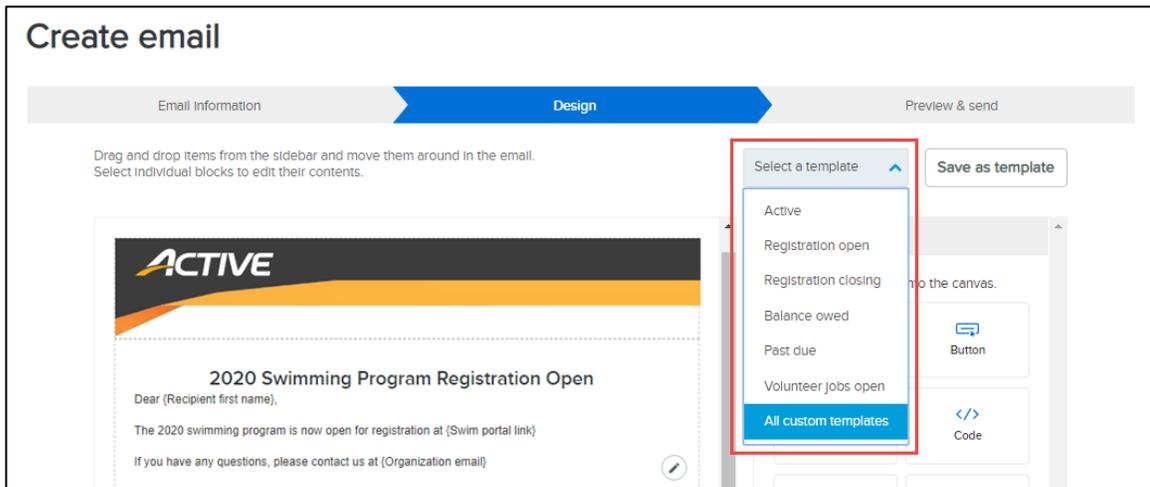
After setting up the email, click **Continue** to proceed to the final **Preview & send** step.

Step 3: Preview & send

In this step, the customized email is displayed in both desktop and mobile previews:
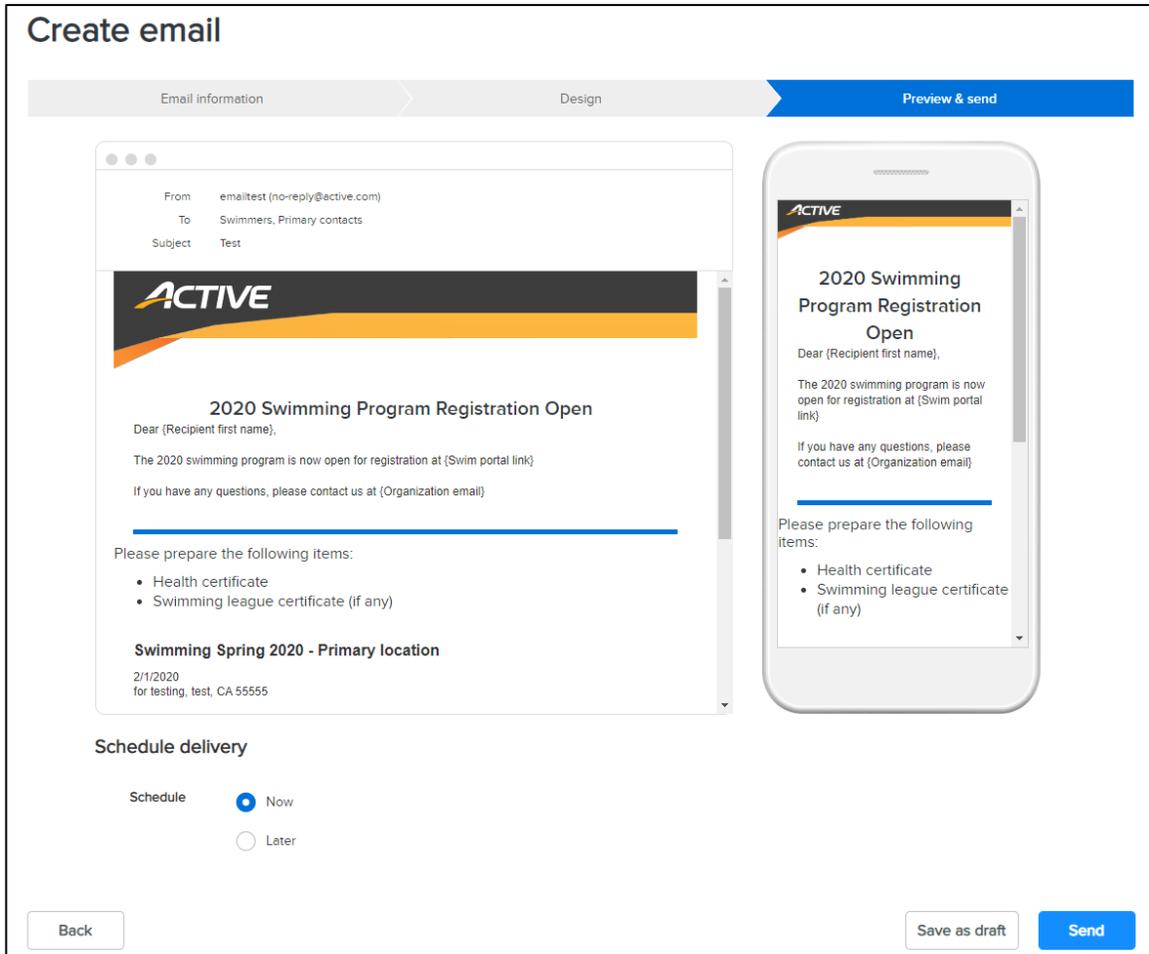
You can:

- save the email as a draft by clicking **Save as draft**. Draft emails can be viewed and edited under the **COMMUNICATIONS** tab > **View all emails** > **Draft** tab.
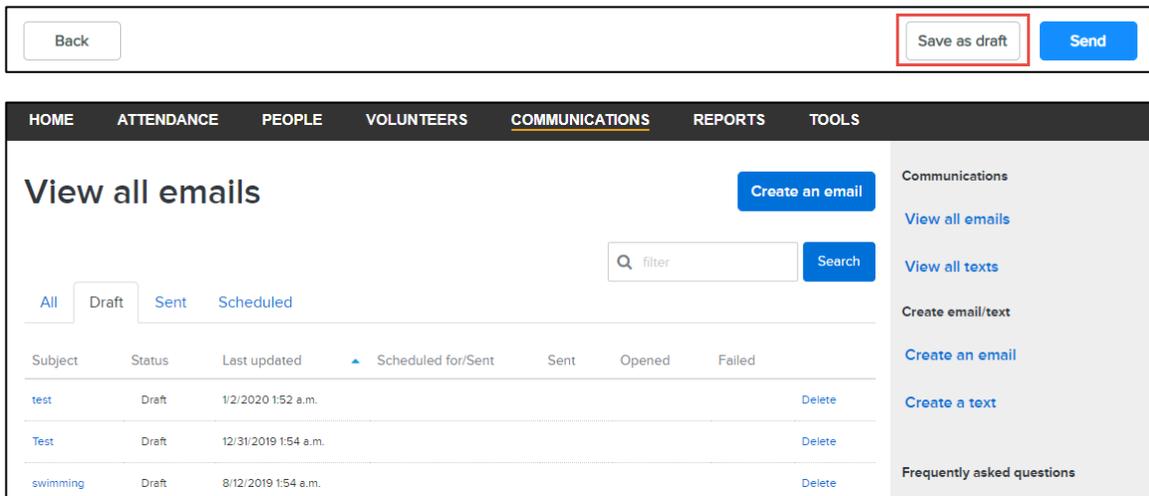
- send the email immediately by selecting **Schedule** > **Now** and then clicking **Send**.

- schedule to send the email later by selecting **Schedule** > **Later**, entering or selecting the required date and time and then clicking **Send when scheduled**.

Legacy emails that were created or sent before this new email tool have been migrated into this tool, subject to the following rules:

- When opening a legacy draft email (**COMMUNICATIONS** tab > **View all emails** > **Draft** tab), the **Subject**, **From** address and **Description** fields are pre-filled in the **Email information** step and the saved contents are displayed as text in the **Preview** step. For example:

- When opening a legacy scheduled or sent email (**COMMUNICATIONS** tab > **View all emails** > **Sent** or **Scheduled** tab), the email contents are displayed in the new desktop preview style. For example:
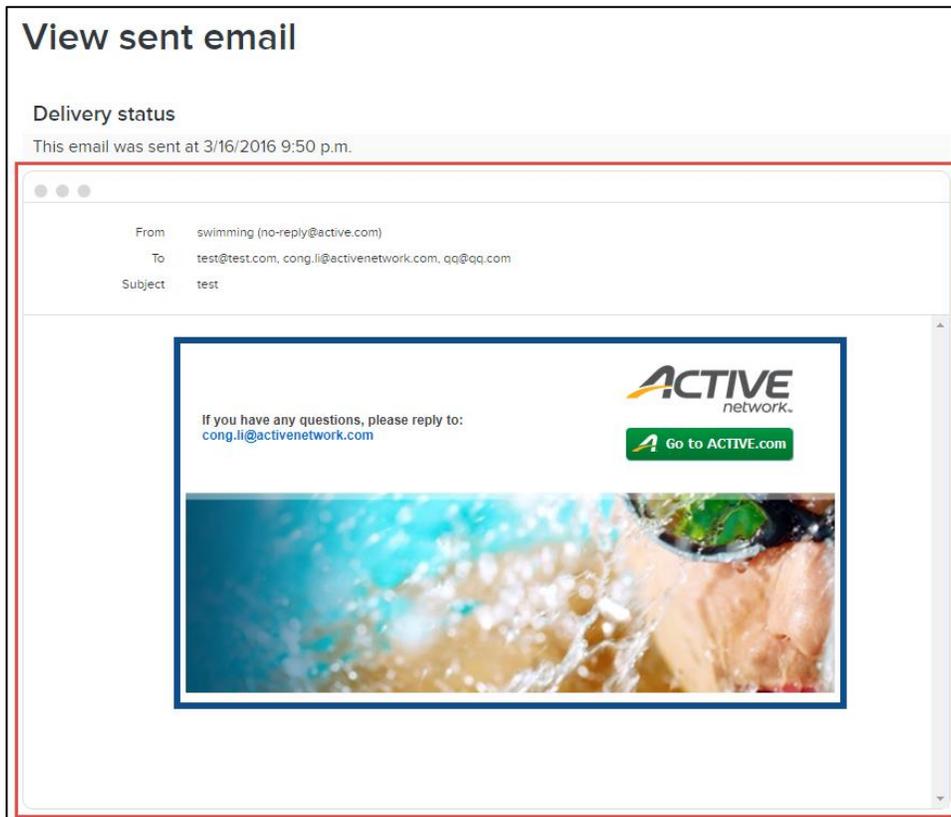
Resolved Issues

No issues were resolved in this release.

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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