



Product Release Notes for ACTIVEWorks Swimming – January 9, 2020

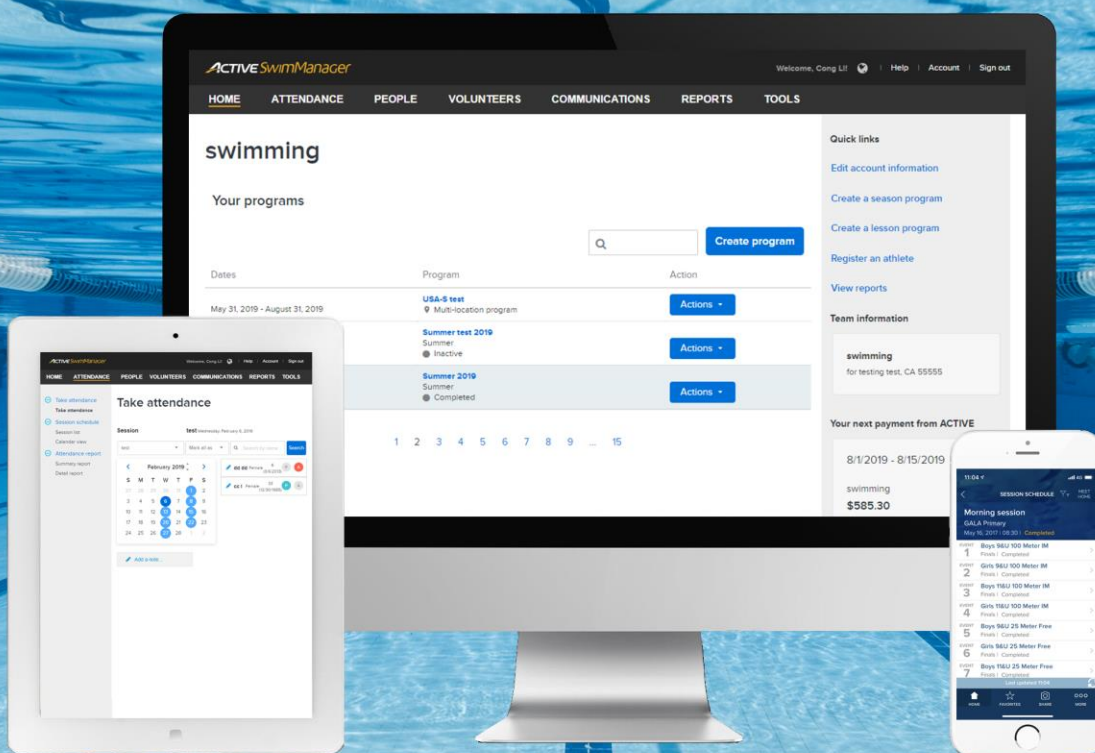


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New Email Tool

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

HOME ATTENDANCE PEOPLE VOLUNTEERS **COMMUNICATIONS** REPORTS TOOLS

Create email

Email information Design Preview & send

Subject *

From emailtest (no-reply@active.com)

Recipients * Click Add recipient lists to choose contacts. Or, type email addresses, separated by comma or semicolon Add

Description * Briefly describe the purpose of this email

For internal reference only, email recipients will not see this description

Exit Continue

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

From address

Customize the "From" email address that recipients can reply to.

Name * emailtest

Reply email address no-reply@active.com

Cancel OK



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.

The screenshot shows the 'Create email' interface with three tabs: 'Email information' (active), 'Design', and 'Preview & send'. The 'Email information' tab contains the following fields:

- Subject ***: A text box containing 'Test'.
- From**: A text box containing 'emailtest (no-reply@active.com)' with an edit icon.
- Recipients ***: A text box with instructions: 'Click Add recipient lists to choose contacts. Or, type email addresses, separated by comma or semicolon'. Below this is a button labeled 'Primary contacts X' and a status message: '17 unique recipient(s) in total, 0 excluded from sending View all'.
- Description ***: A text box with the placeholder 'Briefly describe the purpose of this email'.

A red box highlights the dropdown menu for the 'Recipients' field, which lists the following options:

- Primary contacts (selected)
- All contacts
- Primary contacts
- Swimmers
- Past Due
- Balance Owed
- Custom filter for participants...
- Select from saved lists...
- Import CSV

At the bottom of the form, there is an 'Exit' button on the left and a 'Continue' button on the right. A small note at the bottom center states: 'For internal reference only, email recipients will not see this description'.

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:



Filter recipients

Filter by: ☒ Program ☐ Meet ☐ Session

☒ All programs ☐ Select programs...
You can select "Select programs" to pick specific programs you want.

Contact type: ☒ Parents ☐ Athletes ☐ Secondary contacts

Payment status: ☐ Past due ☐ Balance owed

Registration dates: to

Cancel OK

Filter recipients

☐ Session ☒ want.

Contact type: ☒ Parents ☐ Athletes ☐ Secondary contacts

Payment status: ☒ Past due ☐ Balance owed

Registration dates: to

☒ Save this filter

Cancel OK

You may also import a list of recipients from a CSV file by selecting the **Import CSV** option:

Import contacts

Follow these steps to import contacts

Step1: Prepare your import contacts

First, ensure all email addresses in your file are in one column with the column header name "Email". Then save the file to CSV format.

Step2: Select your file

CSV format, 10MB maximum

Step3: Choose how you want to import contacts

☒ Create a new list

☐ Add to an existing list

Cancel Next

Your contacts
Import only contacts who have opted to receive communications from you, such as signing up at your website or via any ACTIVE Network products.

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:



×

Saved custom filter list

<input type="checkbox"/> Name	Count
<input type="checkbox"/> Import1011	13
<input type="checkbox"/> My list 2019/11/14 3:57:57.41 p.m.	1
<input type="checkbox"/> My list 2019/11/14 4:01:59.838 p.m.	16

Create a new list

Remove

Cancel

OK

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:

Create email

Email information

Design

Preview & send

Subject *

Test

From

emailtest
(no-reply@active.com)

Recipients *

Click Add recipient lists to choose contacts. Or, type email addresses, separated by comma or semicolon

Swimmers

Primary contacts X Swimmers X

5 unique recipient(s) in total, 0 excluded from sending

View all

Description *

Briefly describe the purpose of this email

For internal reference only, email recipients will not see this description

Exit

Continue



Selected recipient(s) ×			
<input checked="" type="checkbox"/>	First Name	Last Name	Email
<input checked="" type="checkbox"/>	John	Behadur	john.bahadur@aaa.com
<input checked="" type="checkbox"/>	John	Jackson	bjohn@aaa.com
<input checked="" type="checkbox"/>	John	Jackson	john.jackson@aaa.com
<input checked="" type="checkbox"/>	Neil	Jackson	neil.jackson@aaa.com
<input checked="" type="checkbox"/>	Andolan	Thapa	andolan.thapa@bbb.com

Close

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):

HOMEATTENDANCEPEOPLEVOLUNTEERSCOMMUNICATIONSREPORTSTOOLS

Create email

Email informationDesignPreview & send

Subject *

From

swimming
(no-reply@active.com)

Recipients *

Click Add recipient lists to choose contacts. Or, type email addresses, separated by comma or semicolon

Add

Workout session participants on 2019/12/13 4:31:44.282 p.m. ×

1 unique recipient(s) in total, 0 excluded from sending [View all](#)

Description *

Briefly describe the purpose of this email

For internal reference only, email recipients will not see this description



HOME ATTENDANCE PEOPLE **VOLUNTEERS** COMMUNICATIONS REPORTS TOOLS

Create email

Email information Design Preview & send

Subject *

From swimming (no-reply@active.com)

Recipients * [Add](#)

Program participants volunteering on 2019/12/13 4:22-11:290 p.m. X

1 unique recipient(s) in total, 0 excluded from sending [View all](#)

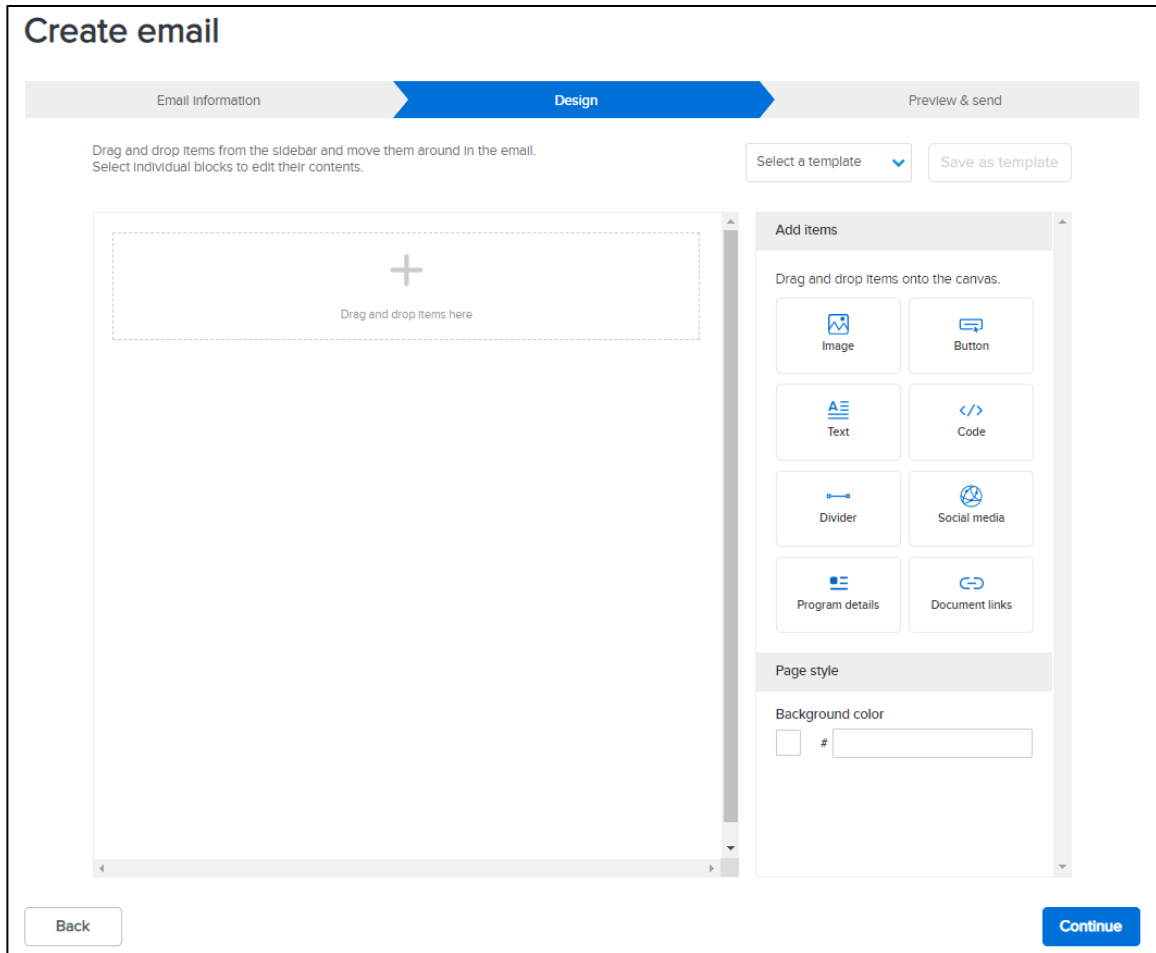
Description *

For internal reference only, email recipients will not see this description

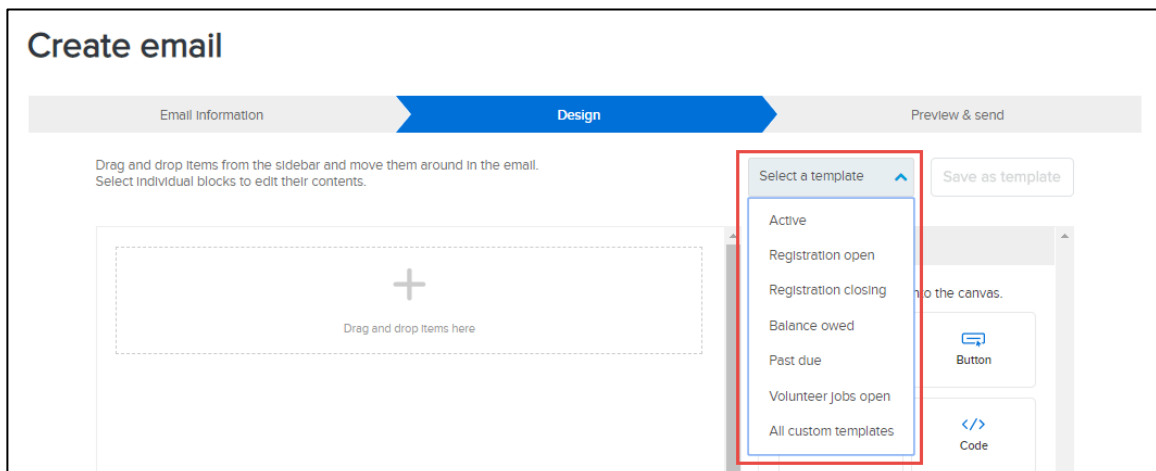
After setting up the required email information, click **Continue** to proceed to the **Design** step.

Step 2: Design

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:

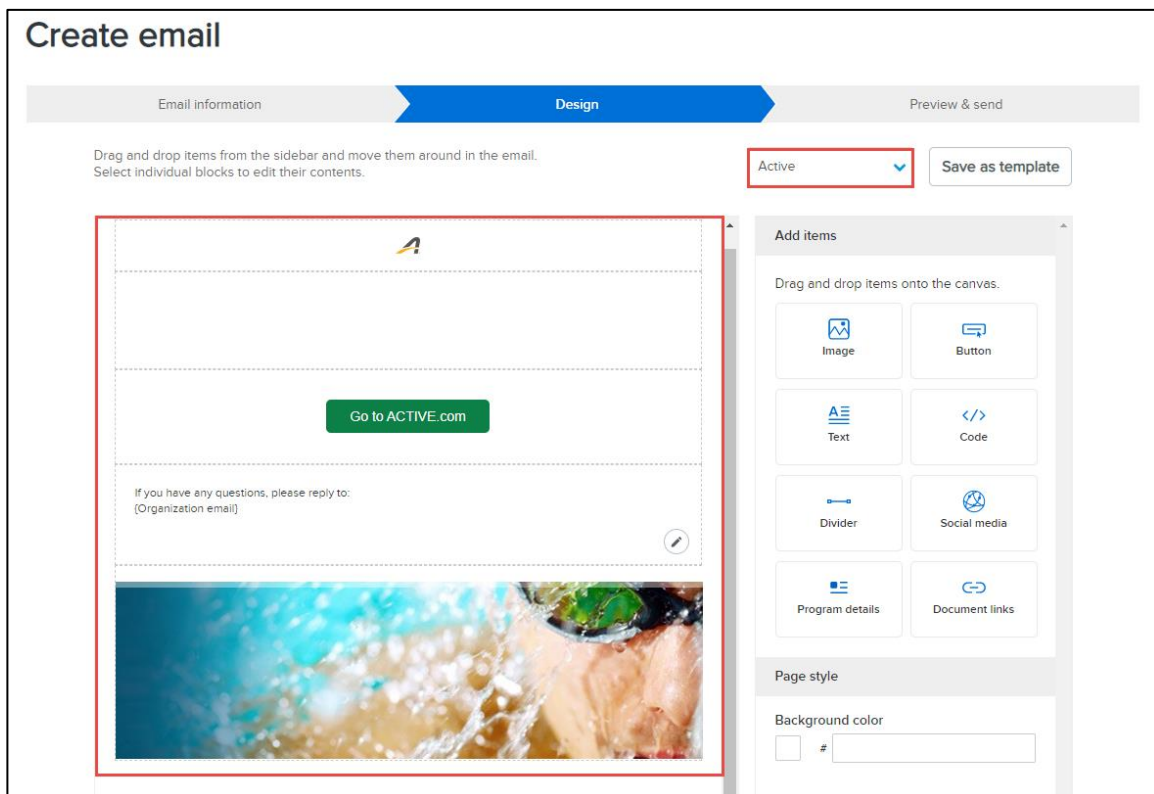
- **Active**
- **Registration open**
- **Registration closing**
- **Balance owed**



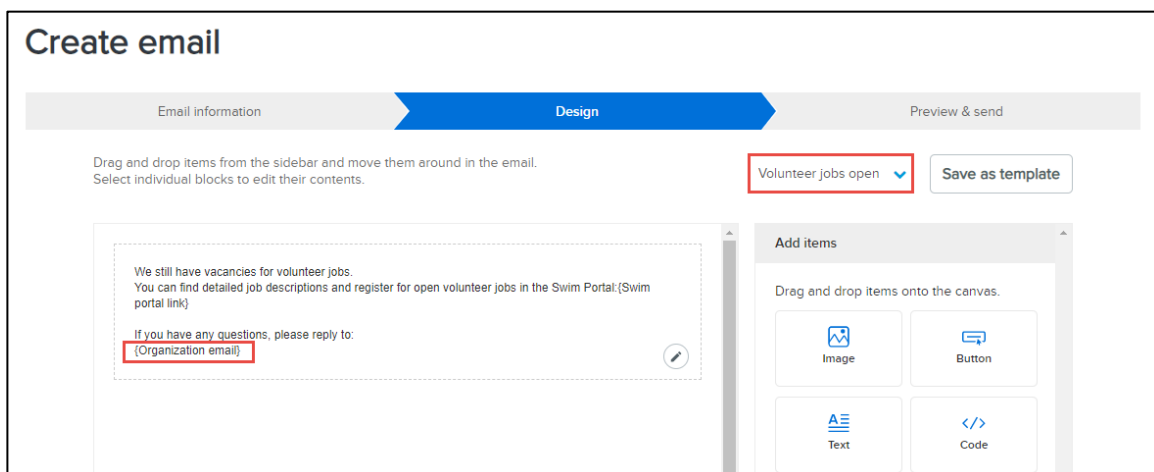
- **Past due**
- **Volunteer jobs open**

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:

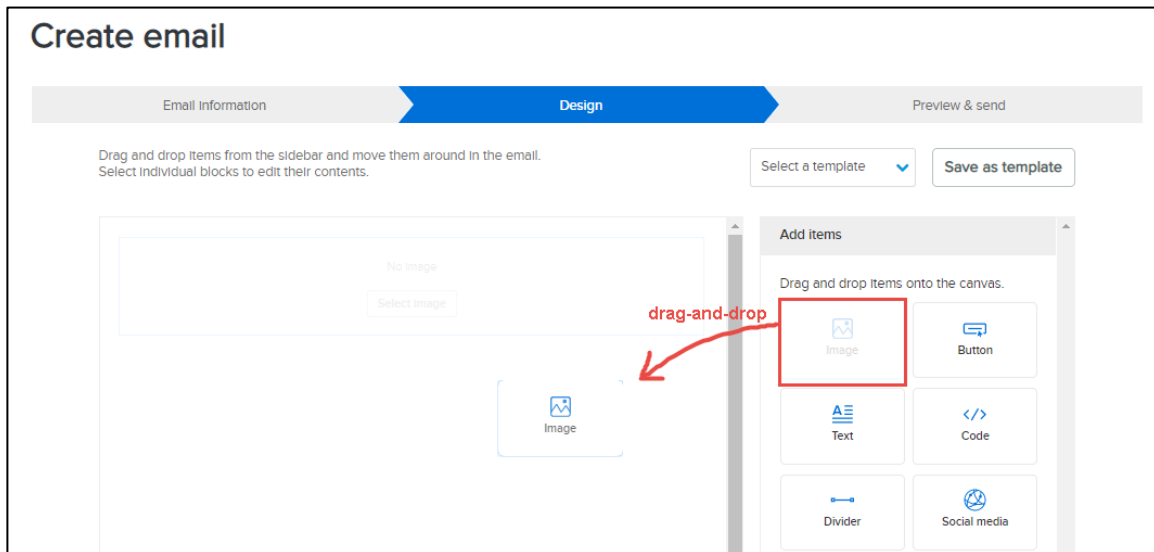


- Both **Active** and **Volunteer jobs open** templates now includes a new {Organization email} variable field to dynamically insert the email address configured in **Account > Organization**:

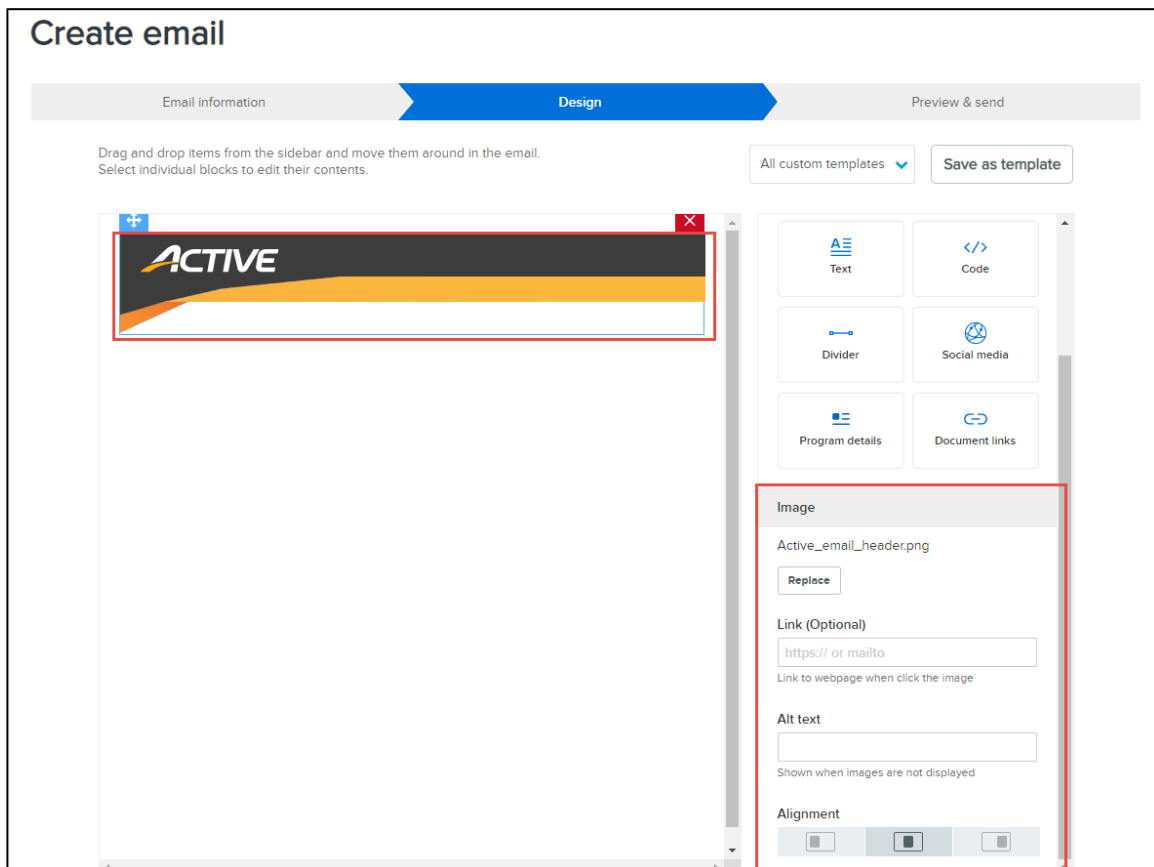




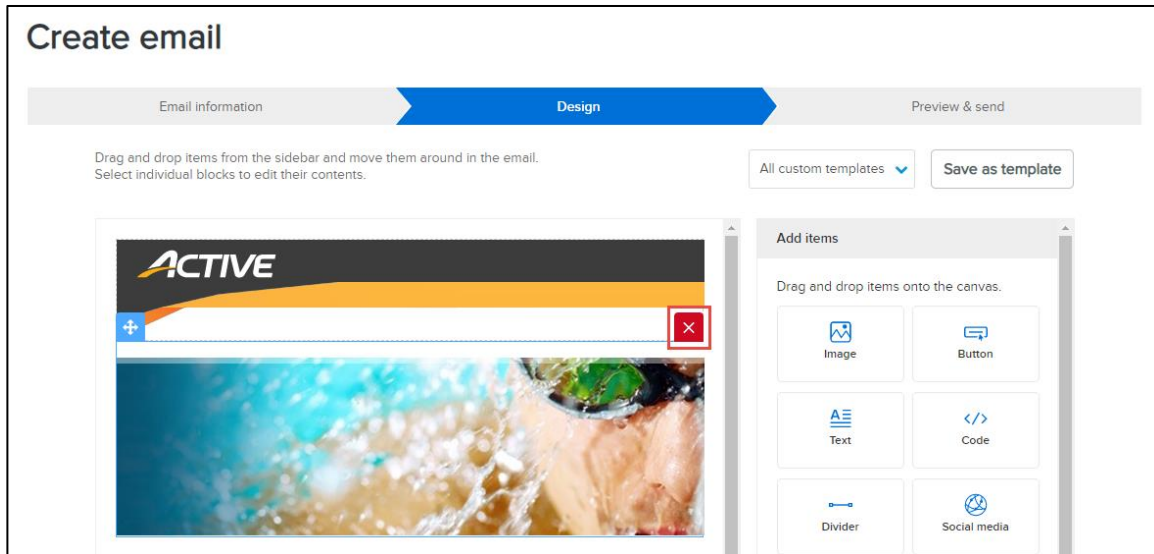
To create a new design, you can drag-and-drop the required **Add Items > Image, Button, Text, Code, Divider, Social media, Program details** and **Document links** items onto the canvas. For example:



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:

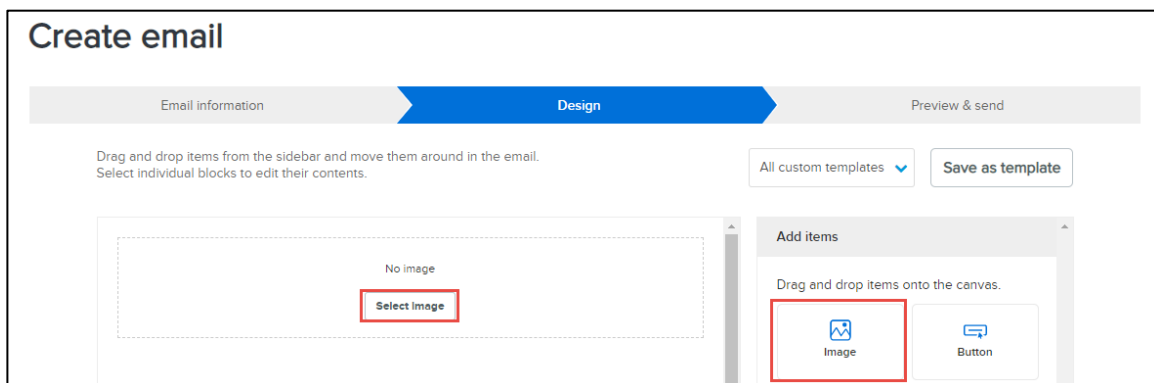


To remove an item from the email canvas, click or hover the cursor over the required item and then click :

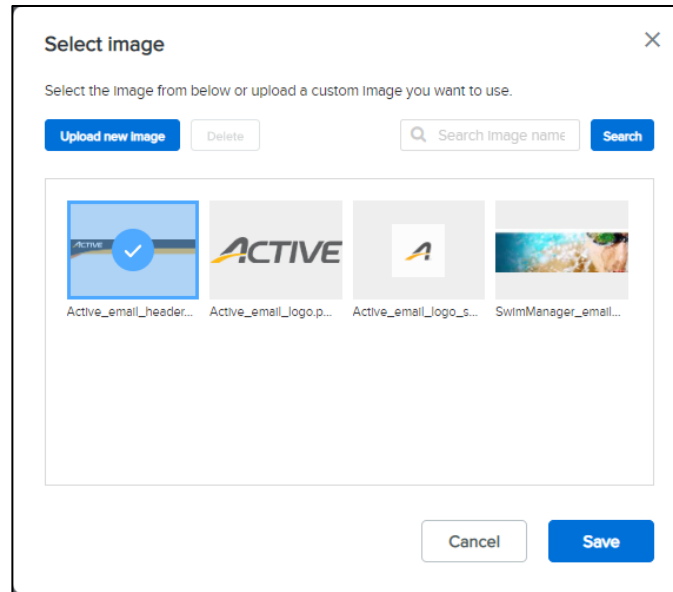


- Adding an image:

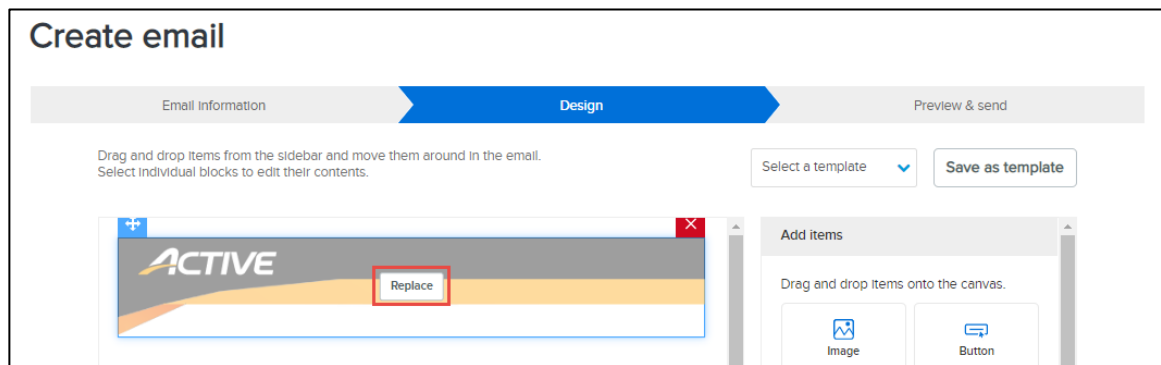
To add an image to the email, drag-and-drop the **Image** item onto the canvas and then click **Select Image**.



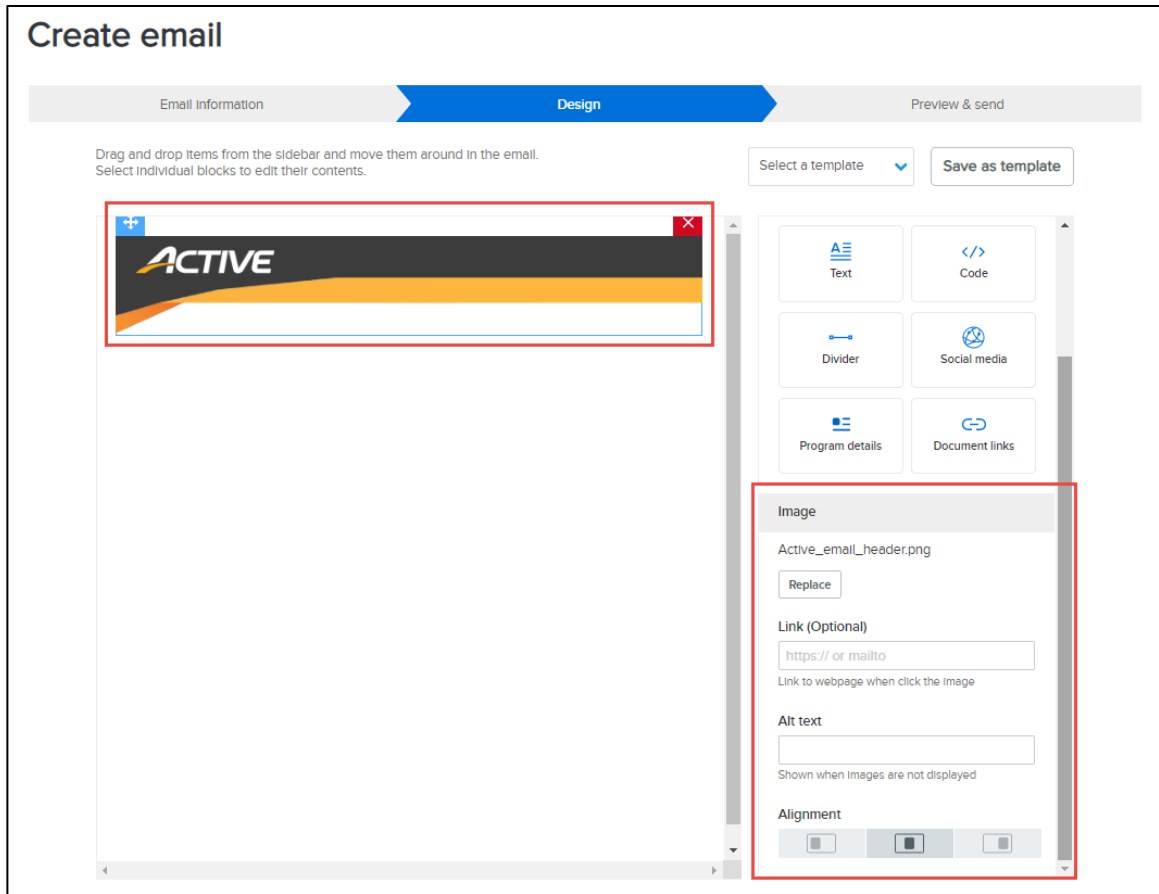
On the **Select image** popup, search for and select an existing image from the image library or upload a new image by clicking the **Upload new image** button (the image must be in JPG, JPEG, GIF or PNG format and under 2 MB in size).



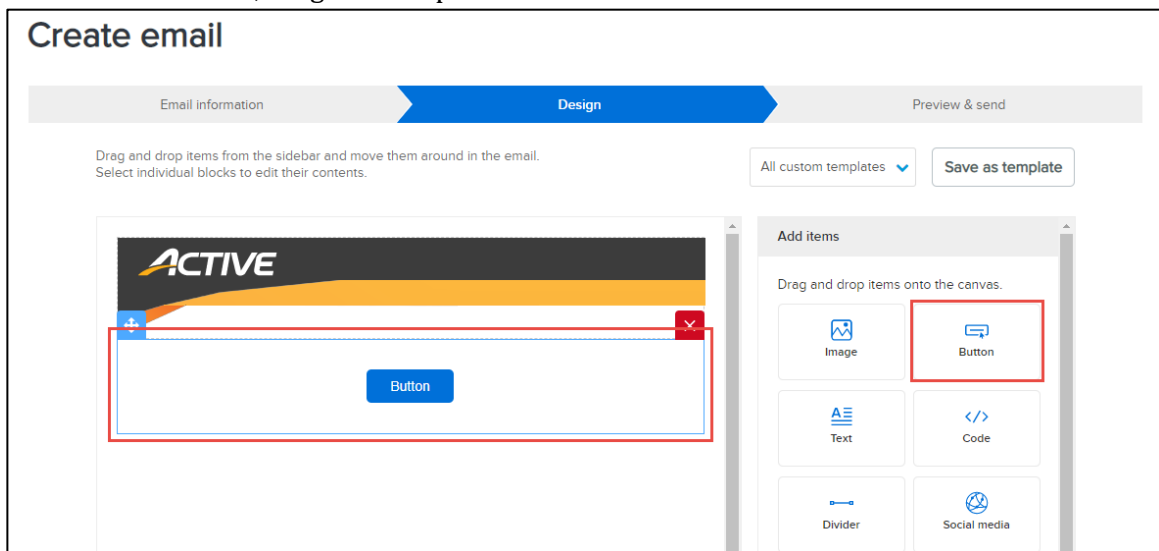
To change an image, hover the cursor over the image and then click **Replace**.



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):



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

+

×

Button

Font

Arial

Text color

ffffff

Button color

0070d9

Background color

ffffff

Corners

Alignment

Button type

Custom link

Button label

Button

Button link

https:// or mailto

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




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.



+

Go to ACTIVE.com

×

Font

Arial

Text color

☐ # ffffff

Button color

☒ # 0c8047

Background color

☐ # ffffff

Corners

☐ ☒

Alignment

☐ ☒ ☐

Button type

Go to ACTIVE.com

Button label

Go to ACTIVE.com

Button link

https://www.active.com/

- **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

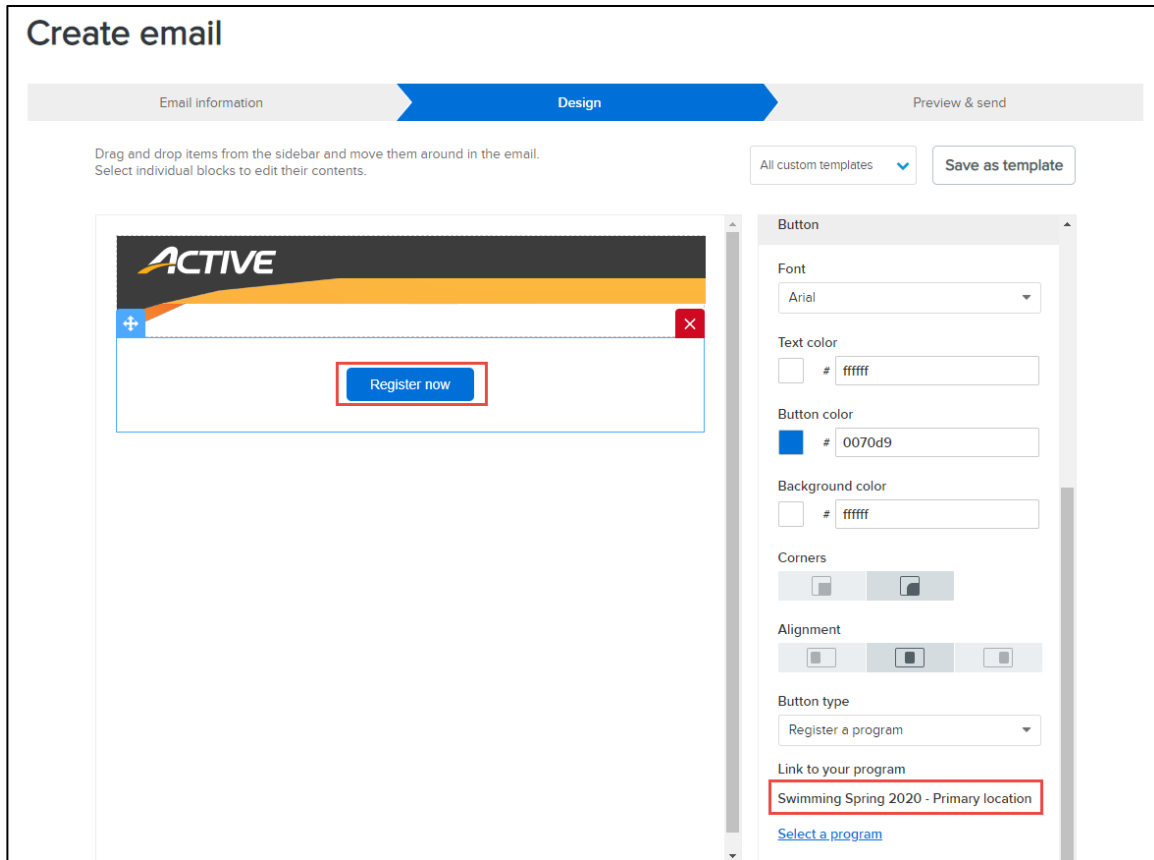
Select a program

Select your program to display its name, date and location

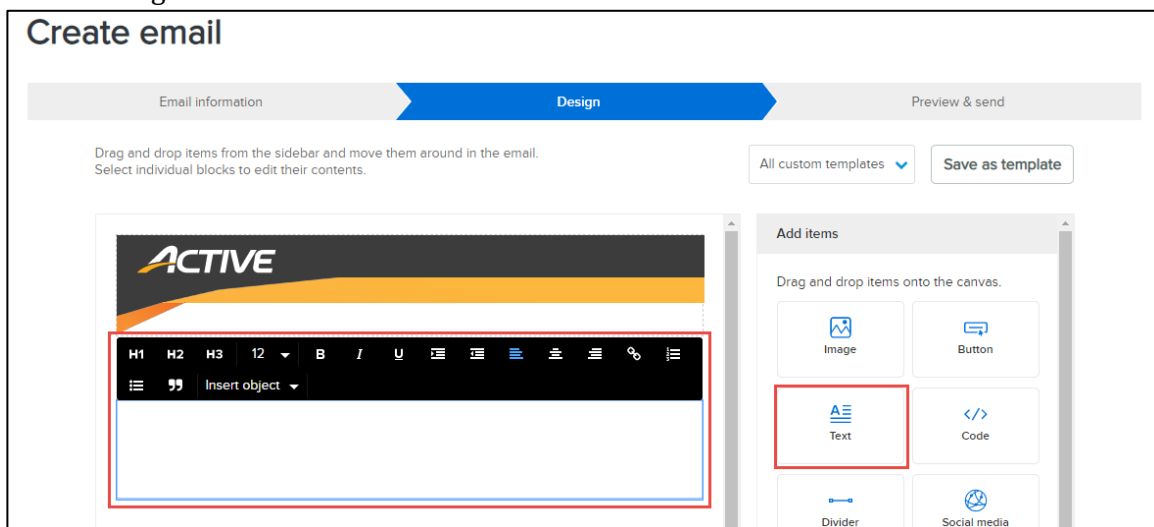
	Program	Program start date
<input checked="" type="checkbox"/>	Swimming Spring 2020 - Primary location	2/1/2020
<input type="checkbox"/>	Swimming winter 2019X - Primary location	11/9/2019
<input type="checkbox"/>	Swimming lessons winter 2019 - Primary location	11/9/2019
<input type="checkbox"/>	swimming Winter 2019 - Primary location	11/2/2019
<input type="checkbox"/>	swimming Winter 2019 - Second location	11/2/2019
<input type="checkbox"/>	swimming Summer 2017 pp test 1 - Primary location	1/1/2018
<input type="checkbox"/>	swimming Winter 2016 USA-S - Primary location	9/30/2016

Close

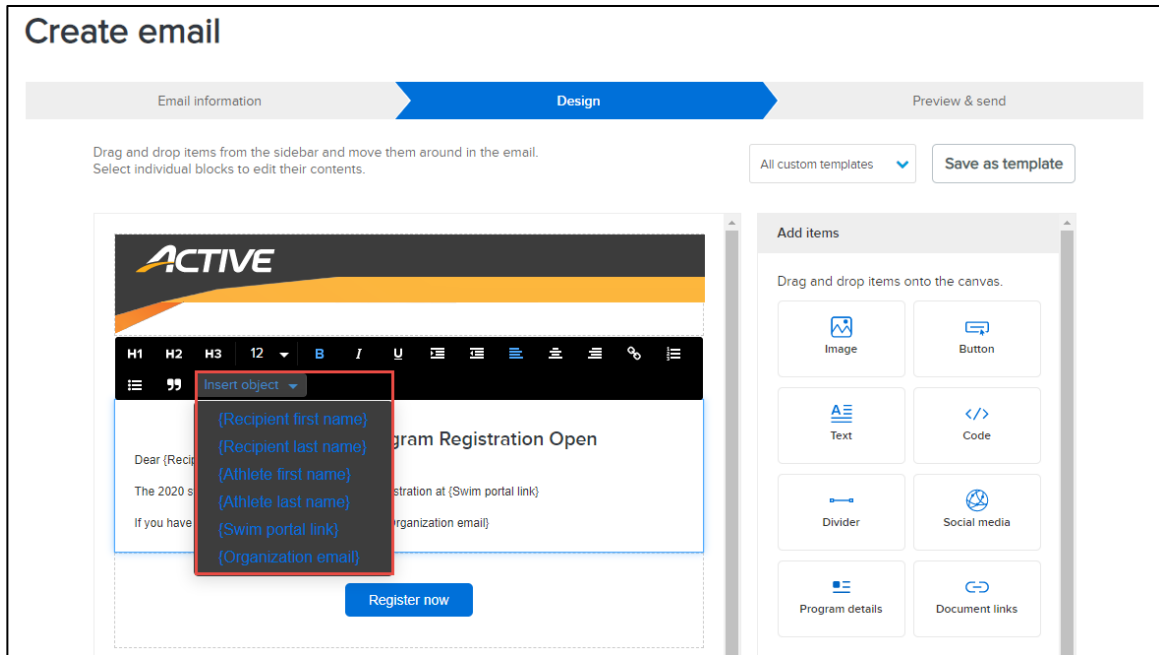
Select



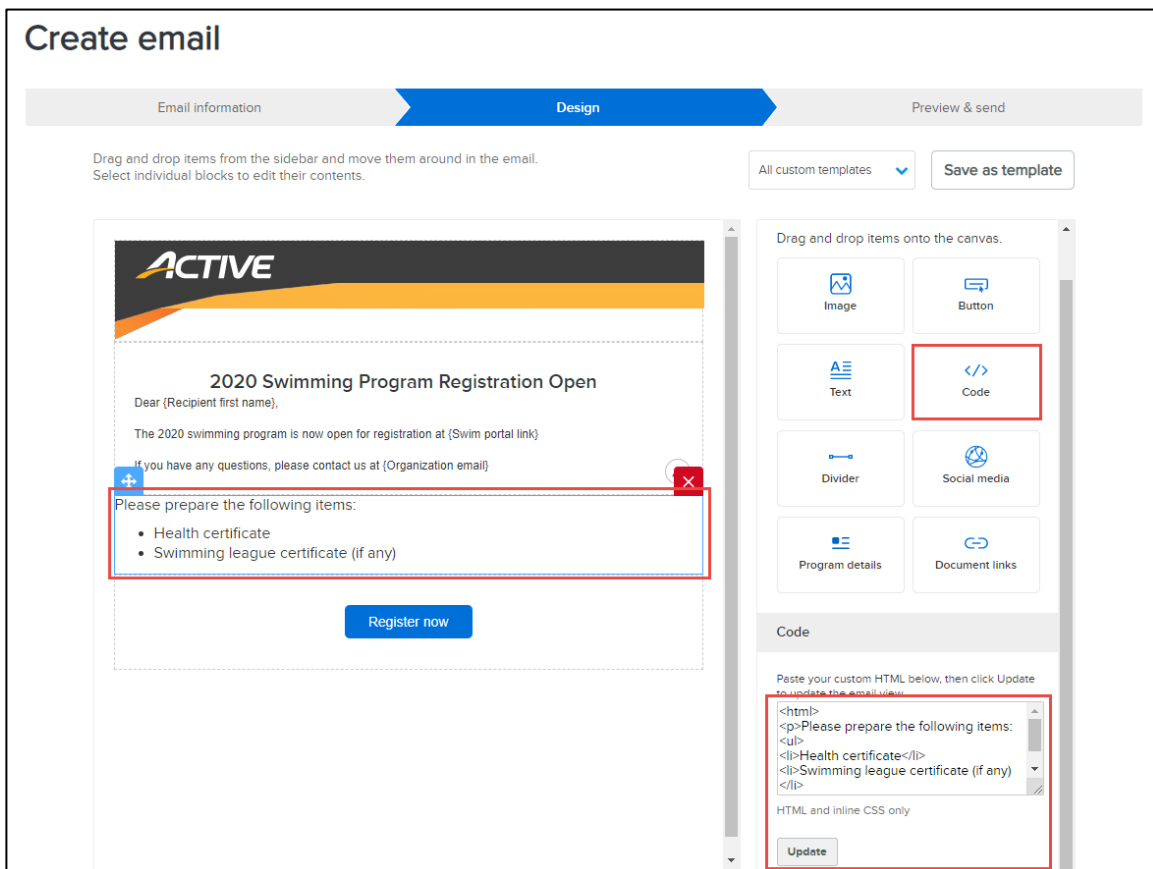
- Adding customized text:
To add customized text to the email, drag-and-drop the **Text** item onto the canvas and then enter the required text using the full-featured text editor:



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.



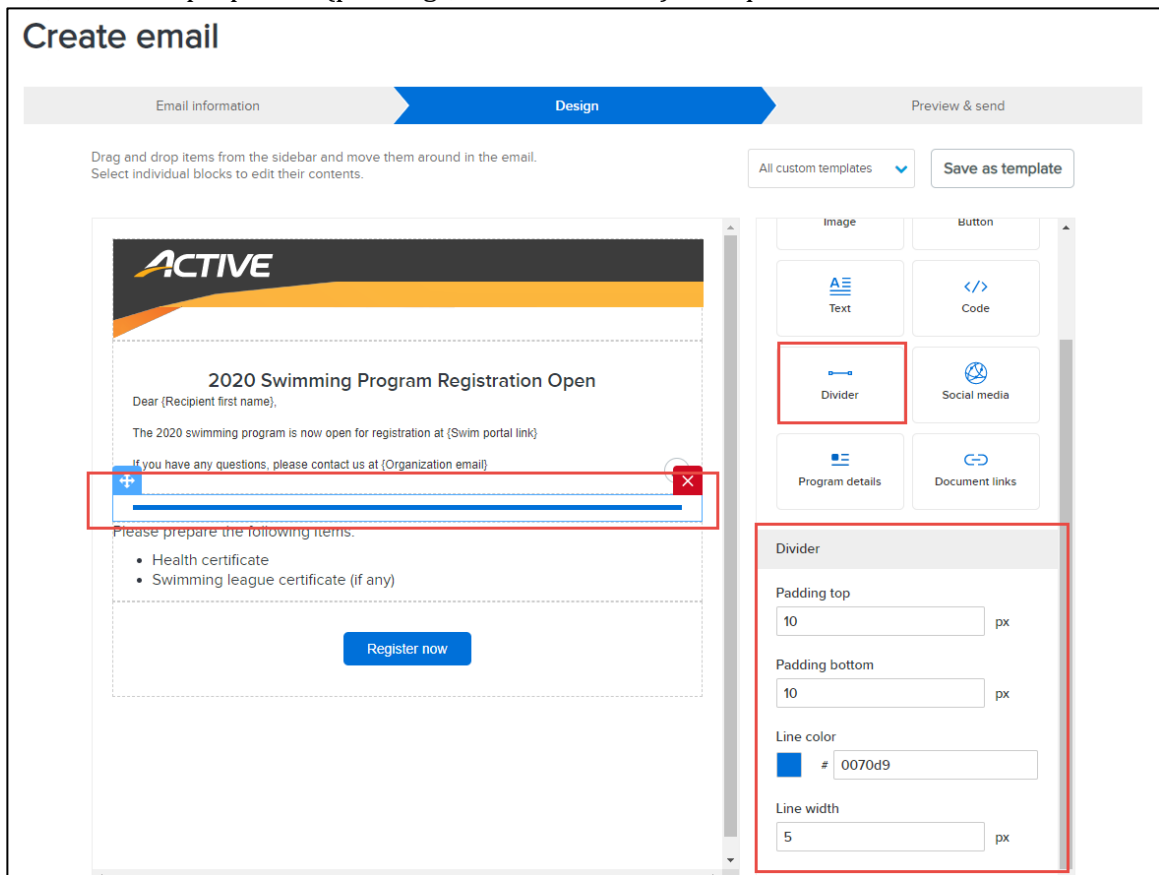
- Adding customized code:
To add custom HTML code to the email, drag-and-drop the **Code** item onto the canvas and then enter the required HTML code in the code editor in the lower-right corner. After clicking **Update**, a preview of the code is displayed on the canvas.





- 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 (padding, 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.



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.

All custom templates Save as template

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

Divider

Social media

Program details

Document links

Social media

Insert your organization's social media URLs so that your email recipients can follow you online.

Show link text for each site ☐

Facebook URL

Twitter URL

Instagram URL

- 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

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
Ariel

Name font size
16

Detail font size
12

Text color
333333

Background color
FFFFFFFF

Alignment

Display program detail
[Select a program](#)

Select a program

Select your program to display its name, date and location

Program	Program start date
<input checked="" type="checkbox"/> Swimming Spring 2020 - Primary location	2/1/2020
<input type="checkbox"/> Swimming winter 2019X - Primary location	11/9/2019
<input type="checkbox"/> Swimming lessons winter 2019 - Primary location	11/9/2019
<input type="checkbox"/> swimming Winter 2019 - Primary location	11/2/2019
<input type="checkbox"/> swimming Winter 2019 - Second location	11/2/2019
<input type="checkbox"/> swimming Summer 2017 pp test 1 - Primary location	1/1/2018
<input type="checkbox"/> swimming Winter 2016 USA-S - Primary location	9/30/2016

Close

Select

21

ACTIVENetwork.com | Product Release



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



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)


Swimming Spring 2020 - Primary location
2/1/2020
for testing, test, CA 55555


Register now





Add items


Drag and drop items onto the canvas.



Image



Button



Text


Code


Divider


Social media


Program details


Document links

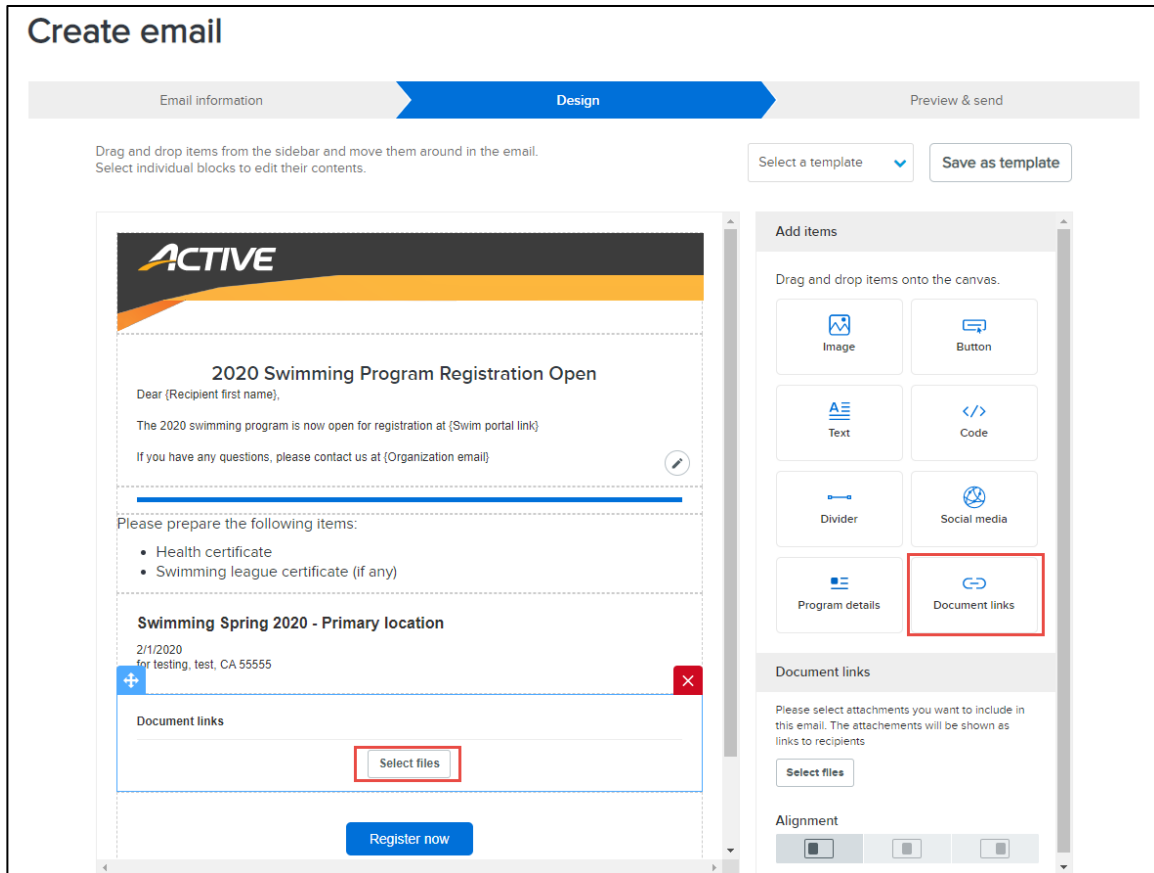
Page style

Background color

#

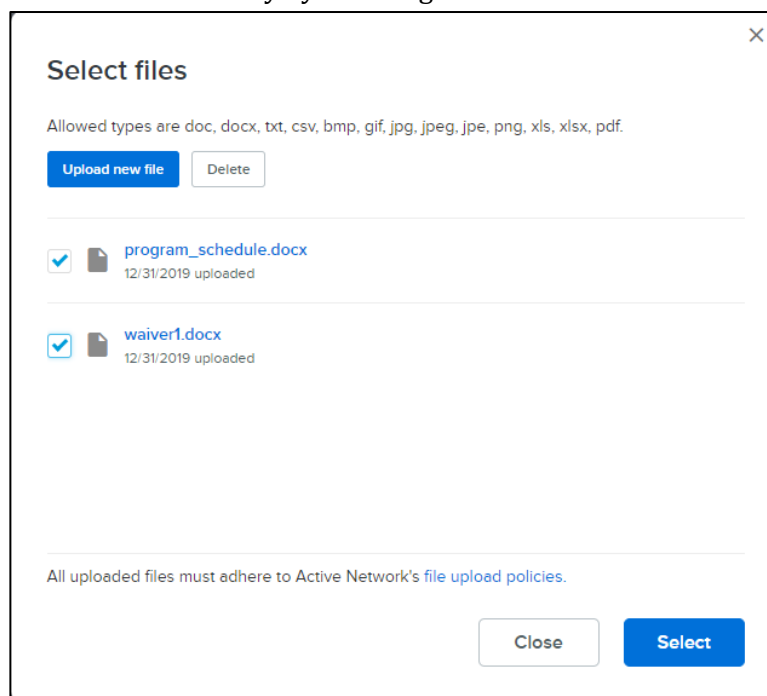
Note: program details are not editable.

- 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**.





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.

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)

Swimming Spring 2020 - Primary location

2/1/2020
for testing, test, CA 55555

Document links

program_schedule.docx

waiver1.docx

Register now

f

t

i

y

Add items

Drag and drop items onto the canvas.

Image

Button

Text

Code

Divider

Social media

Program details

Document links

Document links

Please select attachments you want to include in this email. The attachments will be shown as links to recipients

Select files

program_schedule.docx

waiver1.docx

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).

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

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

Active

Program details

Document links

Program details

Font

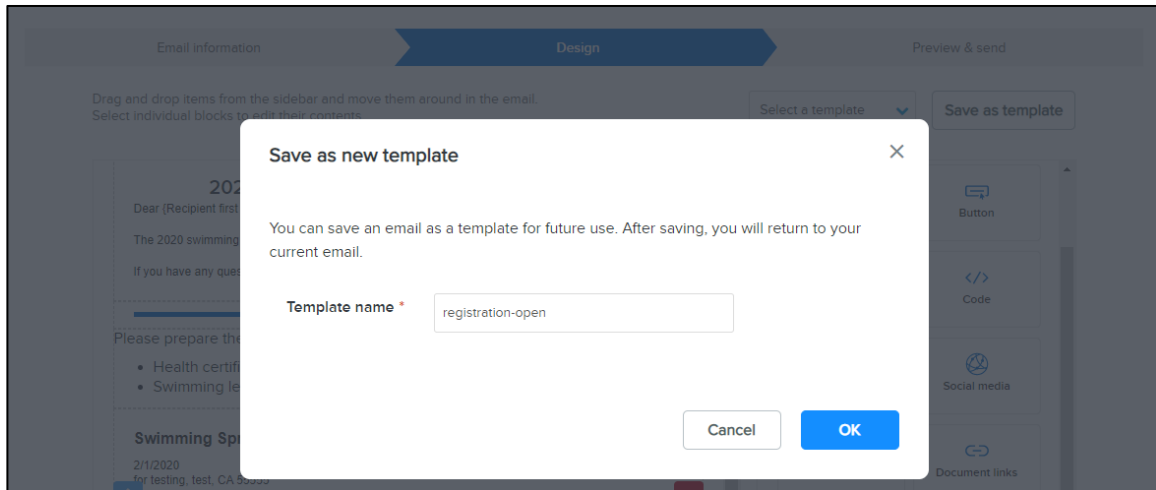
Arial

Name font size

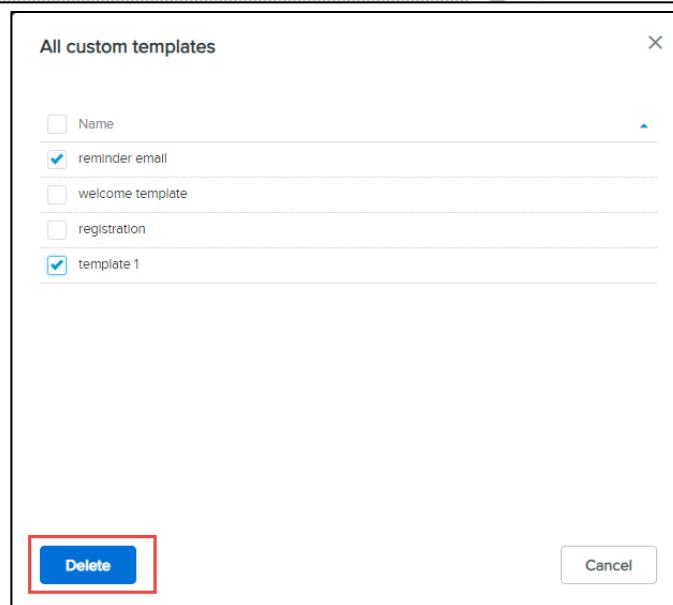
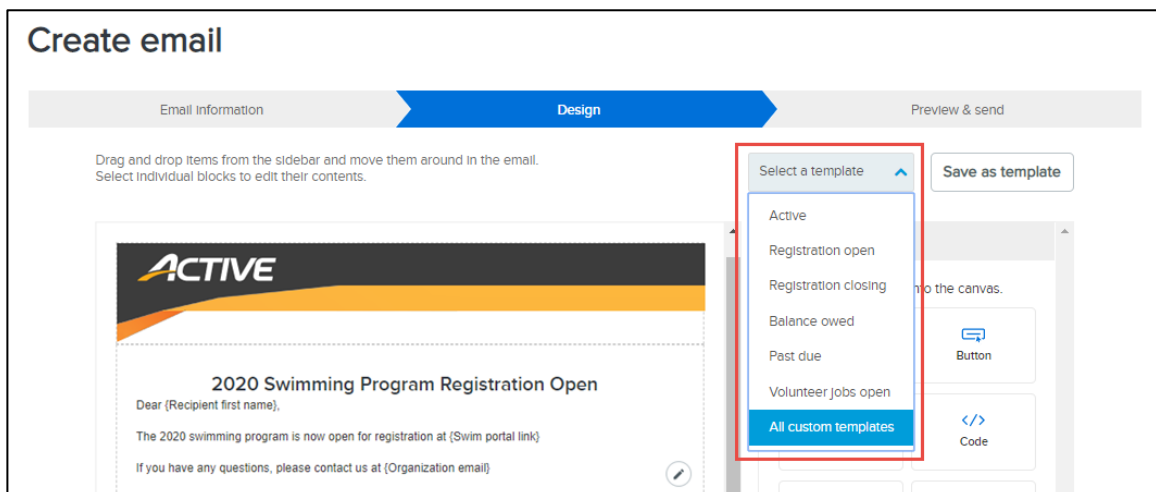
16

Detail font size

12



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:

The screenshot shows the 'Create email' interface with three tabs: 'Email information', 'Design', and 'Preview & send'. The 'Preview & send' tab is active, displaying two preview windows. The desktop preview shows an email with the 'ACTIVE' logo, a subject line '2020 Swimming Program Registration Open', a greeting 'Dear (Recipient first name),', a body paragraph about the 2020 swimming program, a list of items to prepare (Health certificate, Swimming league certificate), and a footer with the date '2/1/2020' and location 'for testing, test, CA 55555'. The mobile preview shows the same content adapted for a smaller screen. Below the previews, there is a 'Schedule delivery' section with 'Now' selected and 'Later' as an option. At the bottom, there are buttons for 'Back', 'Save as draft', and 'Send'.

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.

The screenshot shows the 'View all emails' interface. At the top, there is a navigation bar with tabs: 'HOME', 'ATTENDANCE', 'PEOPLE', 'VOLUNTEERS', 'COMMUNICATIONS' (highlighted), 'REPORTS', and 'TOOLS'. Below the navigation bar, there is a 'View all emails' section with a 'Create an email' button. There is a search bar with a 'filter' placeholder and a 'Search' button. Below the search bar, there are tabs for 'All', 'Draft', 'Sent', and 'Scheduled'. The 'Draft' tab is selected, showing a list of draft emails. The list has columns for 'Subject', 'Status', 'Last updated', 'Scheduled for/Sent', 'Sent', 'Opened', and 'Failed'. There are three draft emails listed: 'test', 'Test', and 'swimming'. Each email has a 'Delete' button next to it. On the right side, there is a sidebar with links for 'Communications', 'View all emails', 'View all texts', 'Create email/text', 'Create an email', 'Create a text', and 'Frequently asked questions'.



- send the email immediately by selecting **Schedule > Now** and then clicking **Send**.

The screenshot shows the 'Schedule delivery' form. Under the 'Schedule' section, the 'Now' radio button is selected and highlighted with a red box. At the bottom right, the 'Send' button is also highlighted with a red box. Other elements include a 'Back' button on the bottom left and a 'Save as draft' button next to the 'Send' button.

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

The screenshot shows the 'Schedule delivery' form with the 'Later' radio button selected and highlighted with a red box. Below it, a date field contains '1/6/2020' and a time field contains '10:00 a.m.', both also highlighted with a red box. At the bottom right, the 'Send when scheduled' button is highlighted with a red box. Other elements include a 'Back' button on the bottom left and a 'Save as draft' button next to the 'Send when scheduled' button.

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:

The screenshot shows the 'View all emails' interface. It features a table with columns: Subject, Status, Last updated, Scheduled for/Sent, Sent, Opened, and Failed. The 'swimming' draft is highlighted with a red box. On the right, there is a sidebar with navigation links for 'Communications', 'View all emails', 'View all texts', 'Create email/text', 'Create an email', 'Create a text', and 'Frequently asked questions'. A 'Create an email' button is also present at the top right.

Subject	Status	Last updated	Scheduled for/Sent	Sent	Opened	Failed
test	Draft	1/2/2020 1:52 a.m.				Delete
Test	Draft	12/31/2019 1:54 a.m.				Delete
swimming	Draft	8/12/2019 1:54 a.m.				Delete



Edit email

Email information

Design

Preview & send

Subject * swimming

From swimming (no-reply@active.com)

Recipients * lc5022@gmail.com, li@qq.com

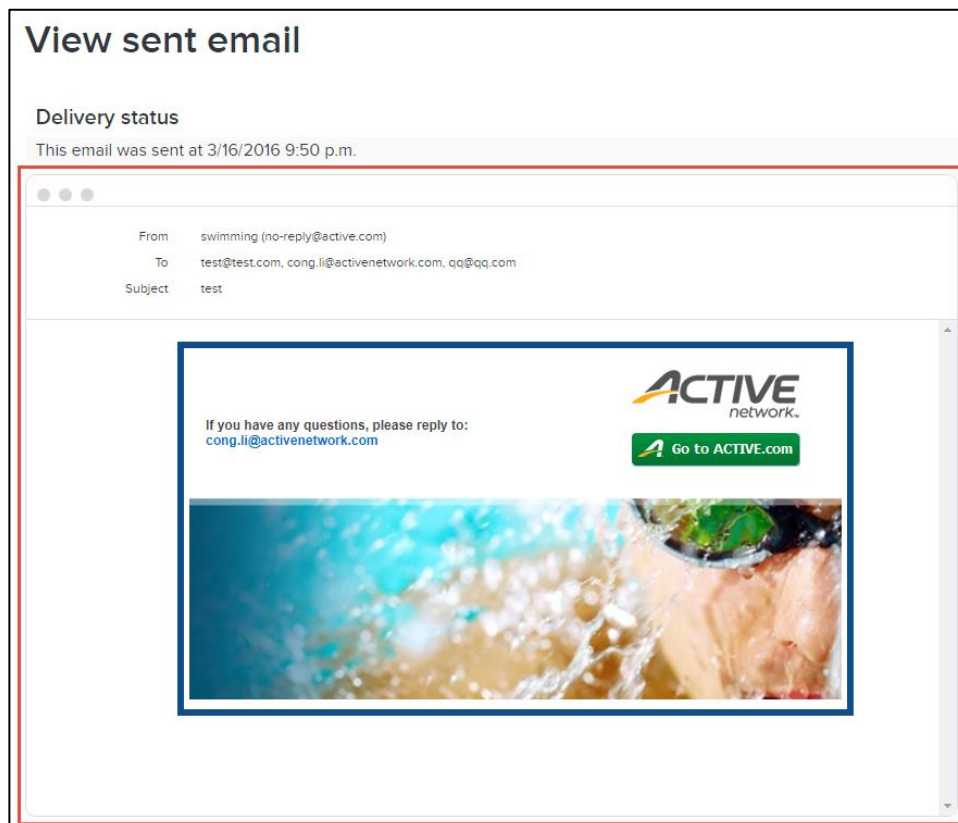
Description * sss

10 unique recipient(s) in total, 0 excluded from sending [View all](#)

For internal reference only, email recipients will not see this description

[Exit](#) [Continue](#)

- 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.



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