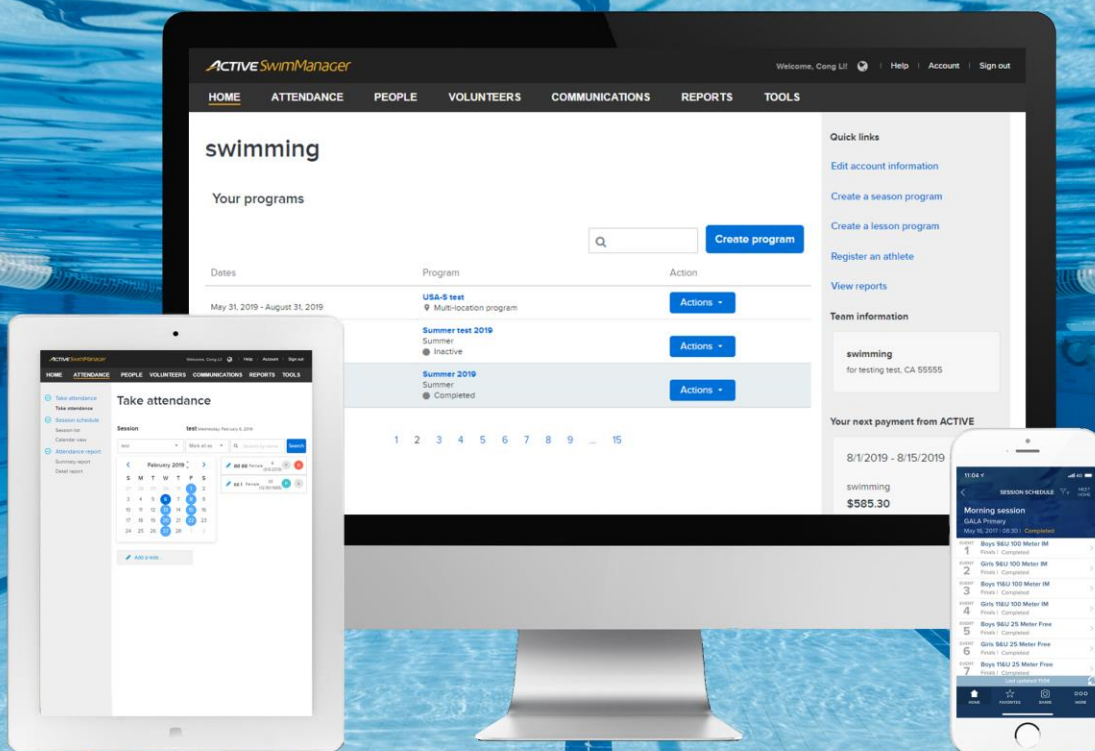




## Product Release Notes for ACTIVEWorks Swimming – February 12, 2020



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## GL Codes

To allow you (administrators and treasurers) to set up and manage General Ledger (GL) codes for your programs and meets so that your agency can track the revenues by GL codes, a new **Account > GL code** feature has been added to the ACTIVE Swim Manager AUI:

The screenshot shows the 'General ledger codes' page in the ACTIVE Swim Manager AUI. The page has a dark header with the logo and navigation links. The main content area shows a table of GL codes. A sidebar on the right contains account settings, and a 'GL code' link is highlighted at the bottom.

Name	Code
Additional purchase	333-232-000
Registration	333-232-211-222

On this page, you can:

- view existing GL codes (by default, the GL codes are listed in ascending, alphabetical order by **Name**. You can click the **Sort by** dropdown list to sort the list from A-to-Z or Z-to-A.)
- add a new GL code by clicking **Add GL code**, entering a **Name** and unique **Code** and then clicking to save the record (to abandon the record, click ):

The screenshot shows the 'General ledger codes' page with the 'Add GL code' form highlighted. The form has fields for 'Name' and 'Code', and a 'Sort by' dropdown. The 'Add GL code' button is highlighted with a red box. The form is also highlighted with a red box.

Name	Code
Example: Registrations, Additional Purchases, ...	Example: 400
Registration	333-232-211-222

- edit an existing GL code by double-clicking the required **Name** or **Code**:



### General ledger codes

Add GL code

Sort by Name A-Z

Name	Code	
<input type="text" value="Additional purchase"/>	<input type="text" value="333-232-000"/>	<div><div>✕</div><div>✓</div></div>
Registration	333-232-211-222	<div><div></div></div>

Note:

- If a GL code has been assigned to any products or is associated with any transactions, then the **Code** field cannot be edited.
- Editing the **Name** of a GL code will update the information in all products and legacy transaction records associated with this GL code.

- delete an existing GL code by clicking  .

Registration	333-232-211-222	<div><div></div></div>
--------------	-----------------	------------------------

Note:

- If a GL code has been assigned to any products, then deleting the GL code unassigns it from all products using this code.
- If a GL code is associated with any transactions, then it cannot be deleted.

After setting up GL codes, you can then assign GL codes to the following products by clicking the **GL code** entry fields (matching results are automatically displayed when you enter a value):

- Programs (note: copying a program with products assigned with GL codes also copies the GL codes to the new program):
  - Registration fees (**HOME** > a program > **Prices and billing** > **GL code** section > **Setup GL code**):



On the **Setup GL codes** popup, GL codes are available to assign to programs, groups, pay in full (if used) and billing schedules (if used):

- Additional purchases (**HOME** > a program > **Additional purchases** > **Edit additional purchases** > an add-on > **Edit properties** > **GL code**):





HOME ATTENDANCE PEOPLE VOLUNTEERS COMMUNICATIONS REPORTS TOOLS

Templates

- Men's swim suit
- Woman's swim suit
- Goggles
- T-shirt
- Swim cap
- Bumper sticker
- Parka
- Warm-up jacket
- Warm-up pants
- Sweatshirt
- Sweatpants
- Custom

## Additional purchases

### Edit properties

[Advanced settings](#)

Name \* Men's swim suit

GL code Additional purchase (333-232-000)

☐ Purchase is required

Description

Note: copying an add-on assigned with a GL code also copies the GL code to the new add-on. You can edit the GL code as required:

### Edit properties

[Advanced settings](#)

Name \* Copy of Men's swim suit

GL code Additional purchase (333-232-000)

☐ Purchase is required

- Volunteer buyout (**HOME** > a program > **Prices and billing** > **Volunteer buyout** section > **Offer volunteer buyout?** checkbox > **GL code**):



**HOME** ATTENDANCE PEOPLE VOLUNTEERS COMMUNICATIONS REPORTS TOOLS

## Prices and billing

Setup prices and billing for your program.

**Price & billing options**

☒ Use same billing settings for all groups.

☐ Prorate the price when athletes register after the season start date. ⓘ

**Offline Payments Note** ⓘ  
You can add a note to participants here about their offline payment. ex. Please make your payment to 12345 Street, City, State 75075. We accept cash, check, and cards (Mastercard and Visa only).

Deposit amount ⓘ \$ 0.00

**Payment Timing**

**All groups**

**Volunteer buyout**  
Give families the option to pay a fee instead of volunteering.

**Offer volunteer buyout?**

☒ families can waive their volunteer commitment by paying 10.00

**GL code** Enter GL code

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

- Late registration fees (**HOME** > a program > **Discounts and fees** > **Late registration fees** checkbox > **GL code**):

**HOME** ATTENDANCE PEOPLE VOLUNTEERS COMMUNICATIONS REPORTS TOOLS

## 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** ☐ 10.00 discount when athletes register by 3/31/2020  
Discount must be less than the first billing amount.

**Late registration fees** ☒ 20.00 fee when athletes register after 5/15/2020

**GL code** Enter GL code

**Family discounts** ☐ Offer discounts to families registering more than one child.

Registration setup  
Program summary  
Program details  
Groups  
Prices and billing  
Discounts and fees  
Form questions  
Additional purchases  
Waivers  
Confirmation email

- Meets:
  - Meet entry fees (**HOME** > a meet > **Actions** > **Meet entry fees**):



	Meet host fees	Custom fees	GL code
Swimmer surcharge:	<input checked="" type="radio"/> \$24.50	<input type="radio"/> x.xx	Enter GL code
Individual events:	<input checked="" type="radio"/> \$1.50	<input type="radio"/> x.xx	Enter GL code
Relay events:	<input checked="" type="radio"/> \$3.00	<input type="radio"/> x.xx	Enter GL code
Team surcharge:	\$0.00		
Facility surcharge:	\$0.00		

- Miscellaneous fees:
  - Batch miscellaneous fees (**PEOPLE > Add miscellaneous fee > GL code**):

Search p Search

People

Add miscellaneous fee Register an athlete

View

Athletes

Parents

Athletes

Active programs

Add miscellaneous fee

Miscellaneous fee detail

Name \*

Description \*

Price \*

Auto charge ☒ Charge automatically if there is card on file.

GL code

Charging list

This miscellaneous fee will be charged from adult athletes or the parent of underage athletes.

- Miscellaneous fees for a single person (**PEOPLE > an adult athlete or a parent > Add miscellaneous fee > GL code**):



Search p Search

## People Record

View

Athlete info

Performance goals

Seasonal Improvement

Back

**Nathan Zhang** - Athlete

USA Swimming ID: 030780NAT\*ZHAN

Gender: MALE

Age (DOB): 39 March 7, 1980

Family

Parents/Guardians

Children

Edit person

Send email

### Wallet

nathan zhang

\*\*\*\*\*5678

ELECTRONIC\_CHECK

nathan

\*\*\*\* \* 4113

Expires: 05/2019

VISA

### Miscellaneous fees

Registrations

Add miscellaneous fee

Search p Search

## People Record

View

Athlete info

Performance goals

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Back

**Nathan Zhang** - Athlete

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### Wallet

nathan zhang

\*\*\*\*\*5678

ELECTRONIC\_CHECK

nathan

\*\*\*\* \* 4113

Expires: 05/2019

VISA

### Miscellaneous fees

Registrations

Add miscellaneous fee

#### Create a miscellaneous fee

Name \*

Description \*

Price \*

☒ Auto bill swimmers if the credit card is on file.

GL code

Enter GL code

Cancel OK

You can also filter the **REPORTS > Transactions** report by **GL code**, and view and sort transactions by GL code using the **GL code** column:





## Transactions

[Back](#)

Filter by

Order type: All

GL code: All

Date: ☒ All  
☐ Additional purchase (333-2...  
☐ Registration (333-232-211-2...

[Apply](#)

Order type: ALL

\$ 140,021.26 (\$ 5,436.93) (\$ 218.96) (\$ 43,573.76)

Total Sales \* Total Processing Fee Total Discounts Total Refunds

\*Total sales does not include discounts, returns and fees

Transaction Date	Order ID	Parent first name	Parent last name	Transfer From	Type	Description	Tender type	Charge	Addon	Discount	Processing fee	Payment	Remittance amount	GL code
1/31/2020	C-76XSH80B168	cc	I		Agency absorbed processing fee (%)	swimming Winter 2016 USA-S athlete: Rrrrrr Li group: Group1					(\$ 29.70)		(\$ 29.70)	
1/31/2020	C-76XSH80B168	cc	I		Registration	swimming Winter 2016 USA-S athlete: Rrrrrr Li group: Group1		\$ 600.00						
1/31/2020	C-76XSH80B168	cc	I		Payment	Credit card payment	Credit card					\$ 600.00	\$ 600.00	
1/14/2020	C-76XSH3NUN1X	cc	I		Agency absorbed processing fee (flat)	Swimming lessons winter 2019 athlete: Rrrrrr Li					(\$ 5.00)		(\$ 5.00)	

## Email Tool: New FAQ links

To assist you and your staff in using the new Email tool implemented in the previous release, the Help Center articles in the **COMMUNICATIONS > Frequently asked questions** section have been replaced by the following new articles:

## Communications

[Create a text](#) [Create an email](#)

Communications

[View all emails](#)

[View all texts](#)

Create email/text

[Create an email](#)

[Create a text](#)

Frequently asked questions

[How do I send emails?](#)

[How do I create an email template?](#)

[How do I customize items on email template?](#)

[How do I send text messages?](#)

### Scheduled and draft emails

Subject	Status	Last updated	Scheduled for/Sent
test	Draft	1/2/2020	-
Test	Draft	12/31/2019	-
swimming	Draft	8/12/2019	-

[View All](#)

### Recent sent emails

Subject	Status	Last updated	Sent
rr	Sent	11/13/2019	11/13/2019
aaa	Sent	9/27/2019	9/27/2019



## Resolved Issues

- Previously, email analytics in the **COMMUNICATIONS > View all emails** feature failed to track opened email statistics. This issue has been resolved in this release.



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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](https://ACTIVEnetwork.com).

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