ACTIVEworks

Product Release Notes for ACTIVEWorks Swimming – February 12, 2020
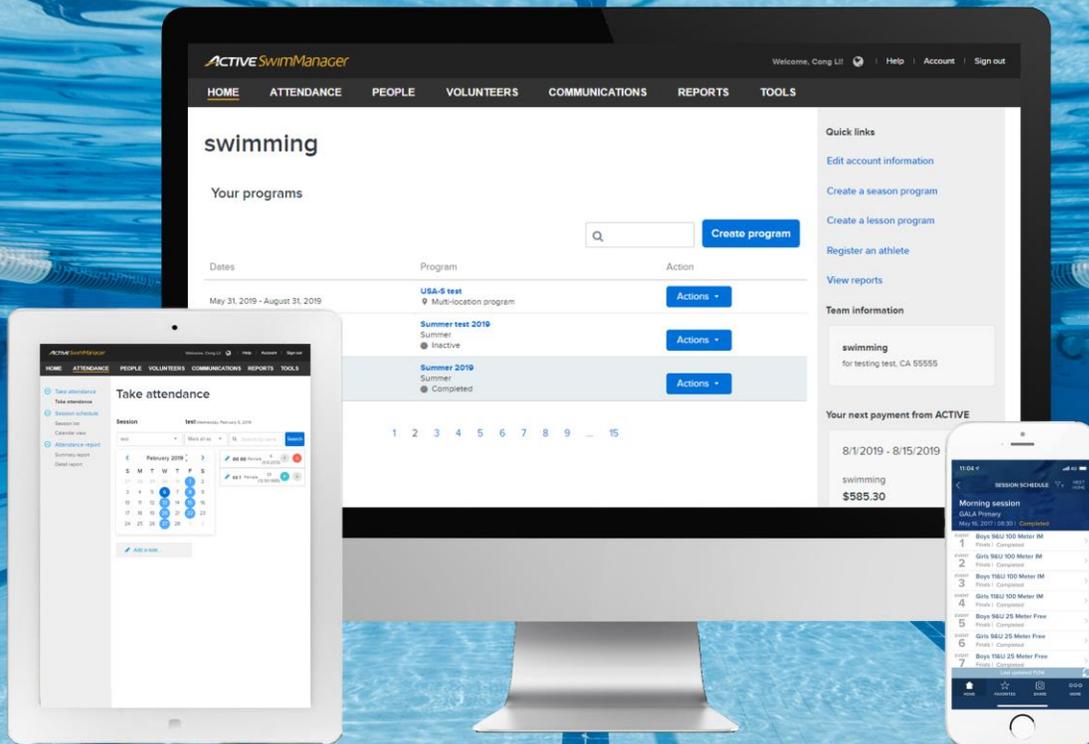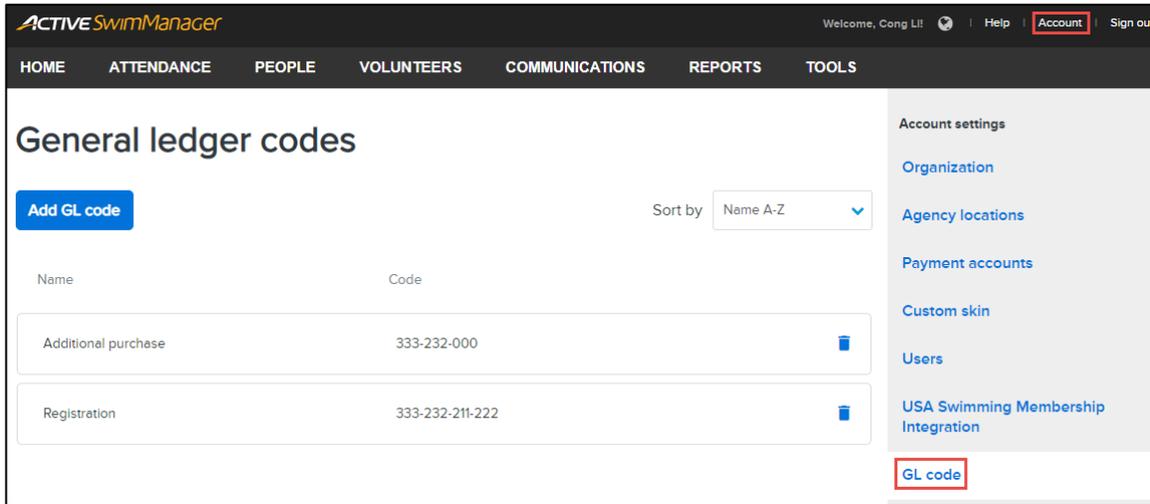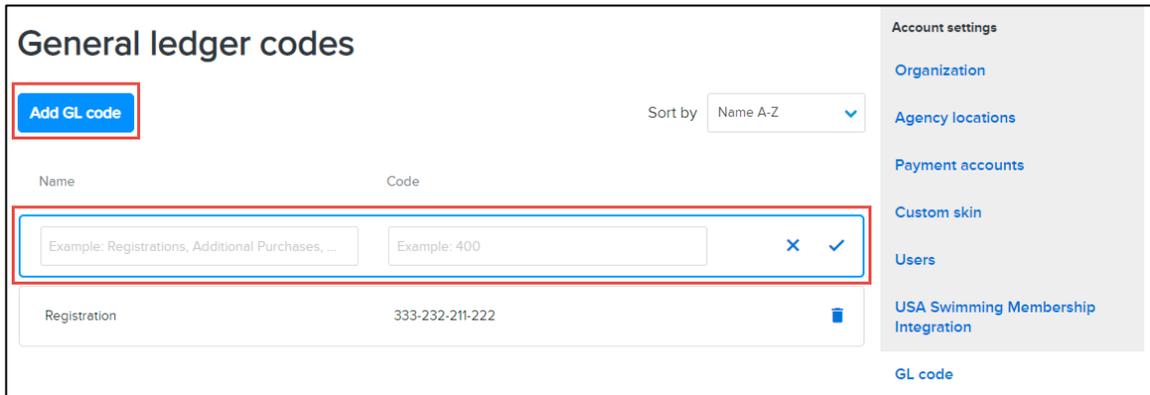
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GL Codes

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:

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 ✕):

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

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 🗑 .

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**):
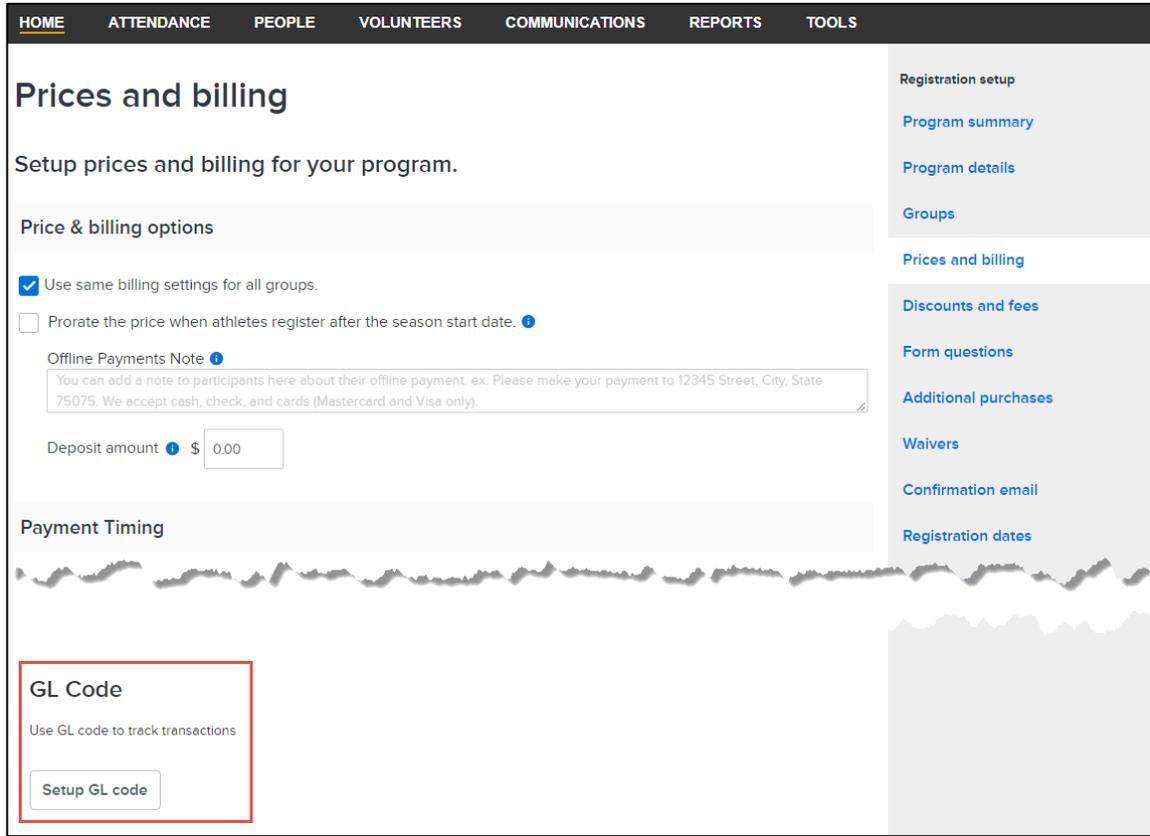
On the **Setup GL codes** popup, GL codes are available to assign to programs, groups, pay in full (if used) and billing schedules (if used):
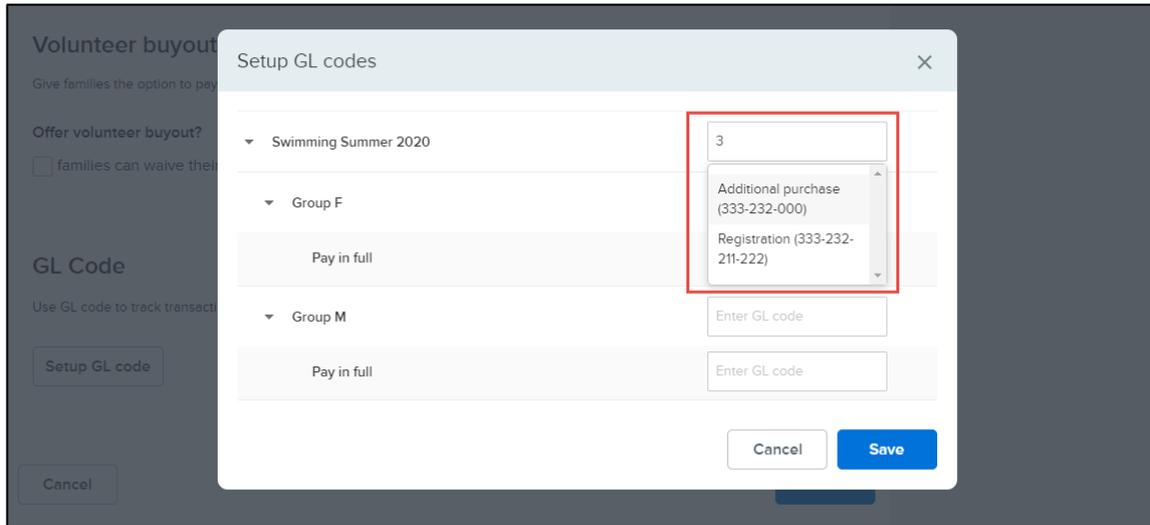
‒ Additional purchases (**HOME** > a program > **Additional purchases** > **Edit additional purchases** > an add-on > **Edit properties** > **GL code**):

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:

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

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

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

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

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

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

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:

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.

ACTIVE Network, LLC

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