Camp & Class Manager

RELEASE NOTES 10.4

Tuesday, April 7, 2020

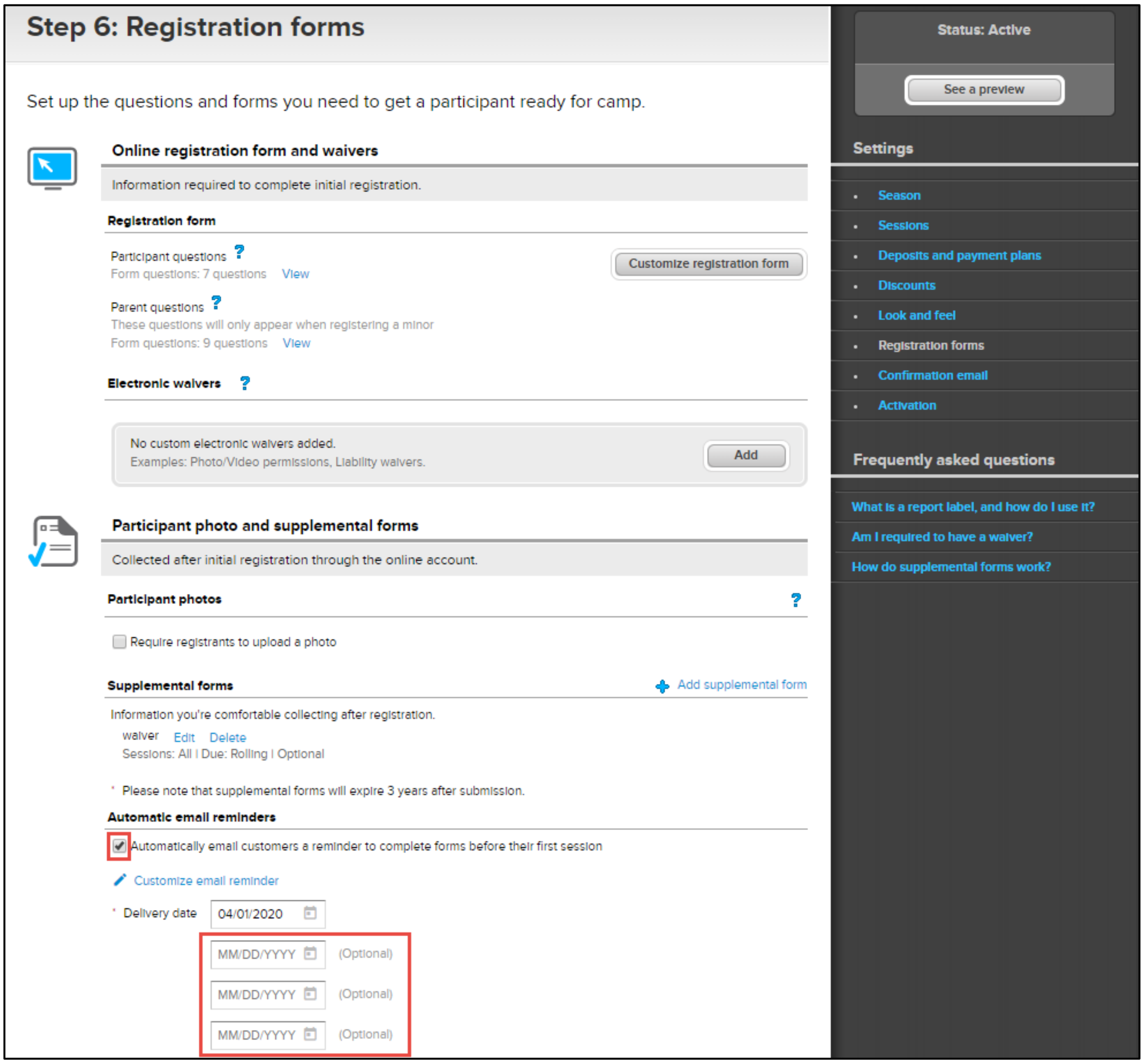
Contents

Supplemental Forms

Automatic Email Reminders

Previously, agency users could only set a single date on which to automatically send email reminders to participants who failed to submit the required forms (if additional reminders were required, then agency users had to manually change the date for each reminder).

Now, agency users can schedule reminders to be sent on multiple dates by checking the Admin Site > **Home** > a season > **Setup** > **Registration forms** > **Participant photo and supplemental forms** section > **Automatic email reminders** checkbox and then selecting up to three additional dates:



Note:

- Duplicate dates are allowed.
- Users can set the dates in a random order, but the reminder emails will be sent in chronological order, for example, setting:
  - Required: *03/30/2020*
  - Optional: *04/22/2020*
  - Optional: *03/23/2020*

- Optional: *05/30/2020*

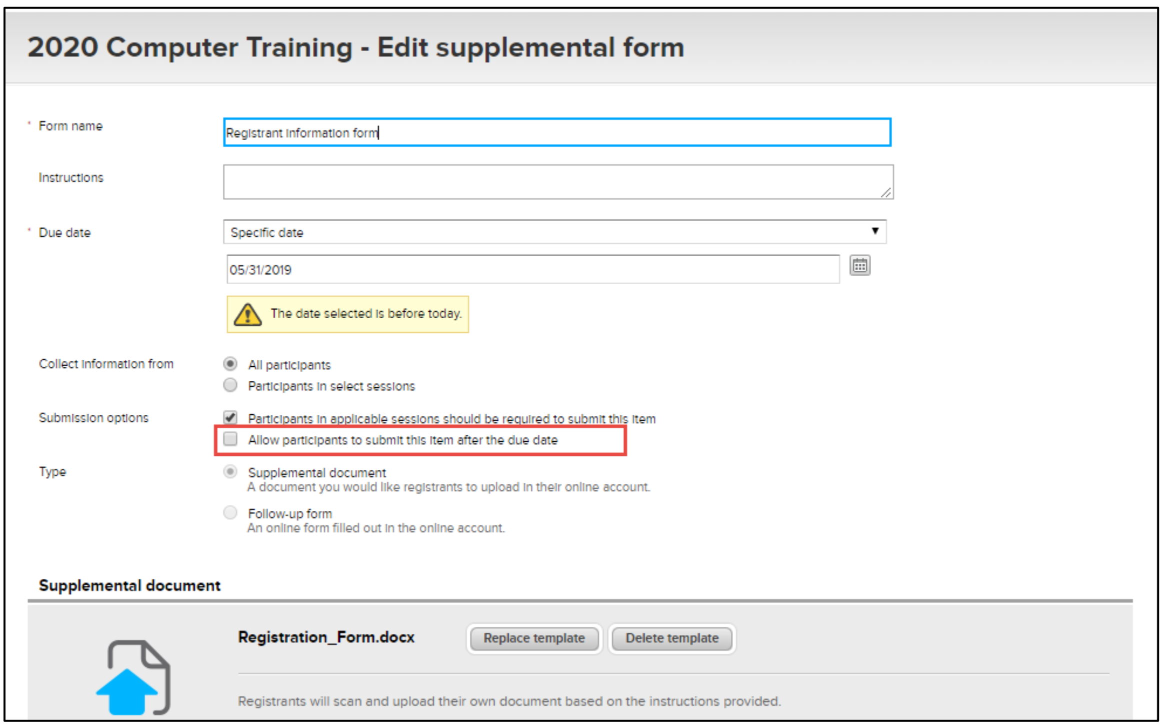
will send reminders on 3/23, 3/30, 4/22 and 5/30.

Once the dates are set, a reminder email will be sent on each scheduled date to the most recent recipient list (if duplicated dates are set, then only a single email reminder will be sent on the duplicated date).

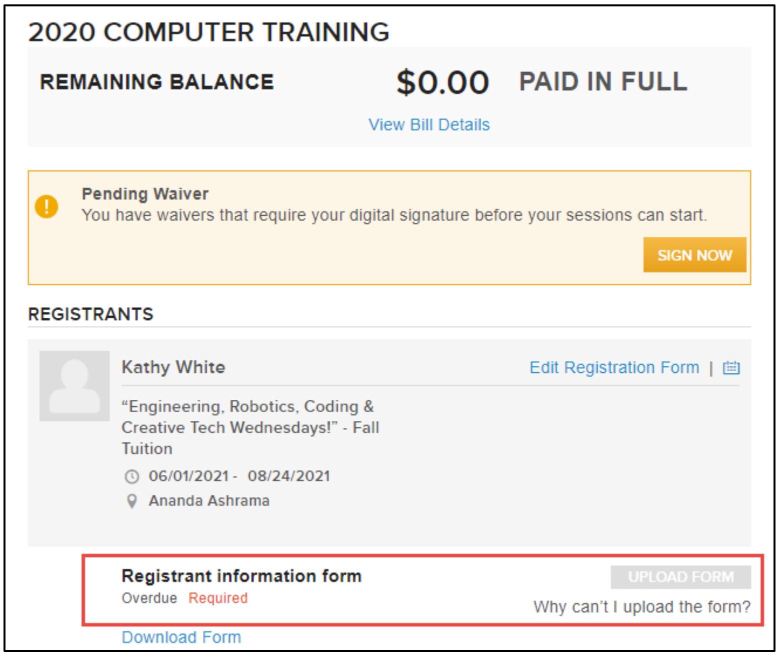
Submission After Due Date

Previously, consumers could upload a supplemental form even after its due date via the Customer Online Account Page (but could not submit an overdue follow-up form).

Now, agency users can control whether to allow late submissions by setting the Admin Site > **Home** > a season > **Setup** > **Registration forms** > **Participant photo and supplemental forms** section > **Supplemental forms** > **Add** a new form/**Edit** an existing form > **Allow participants to submit this item after the due date** checkbox (unchecked by default):

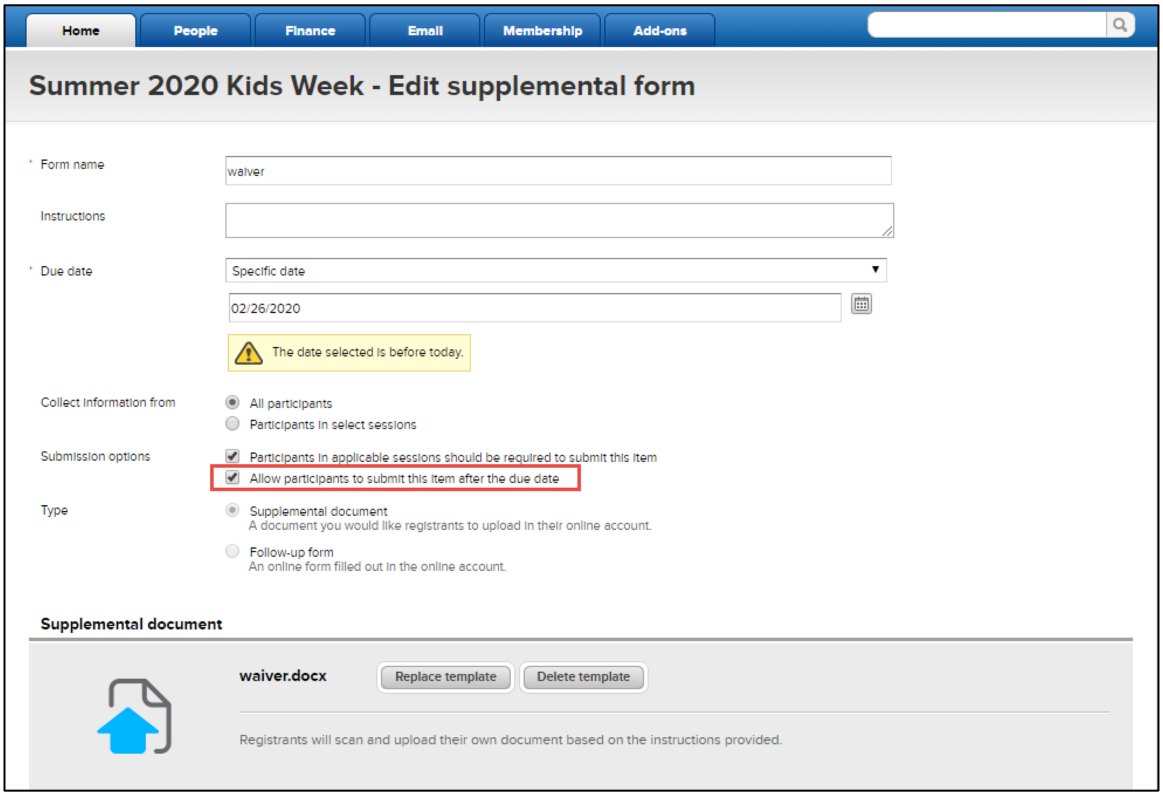


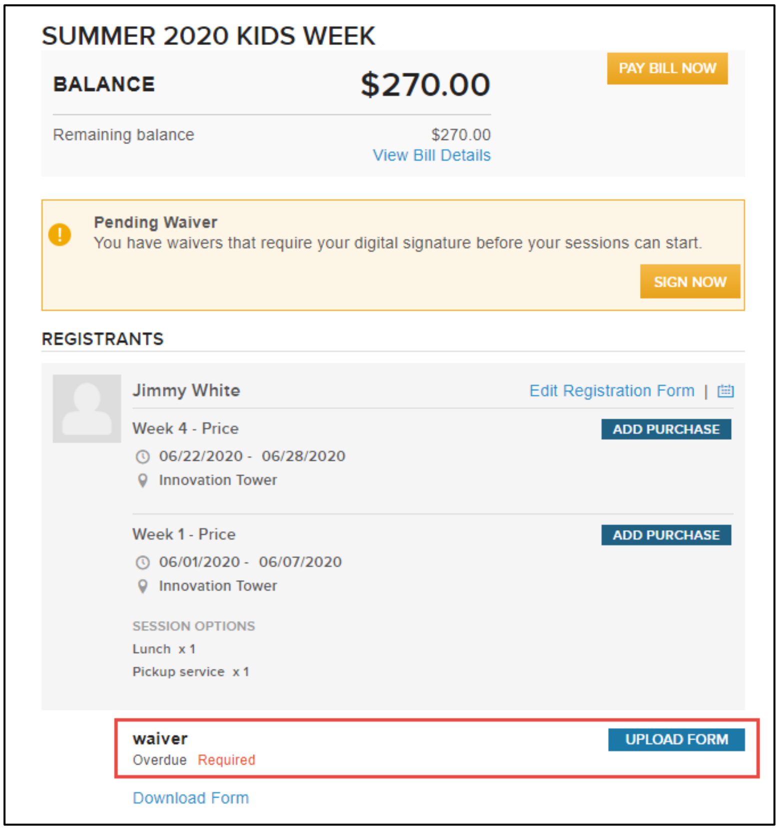
When this checkbox is unchecked, the Customer Online Account > **UPLOAD FORM** (or **FILL OUT FORM**) button for the form will be disabled after the due date so that consumers can no longer submit the form:



If agency users check the Admin Site > **Allow participants to submit this item after the due date** checkbox, then consumers can upload (or submit) the form after its due date by clicking the Customer Online Account Page > required form > **UPLOAD FORM** (or **FILL OUT FORM**) button.

Note: for existing seasons that already have supplemental forms set up, if the agency wishes to allow their consumers to submit the forms after the due date, then they must go to the season setup and check this checkbox for each form:

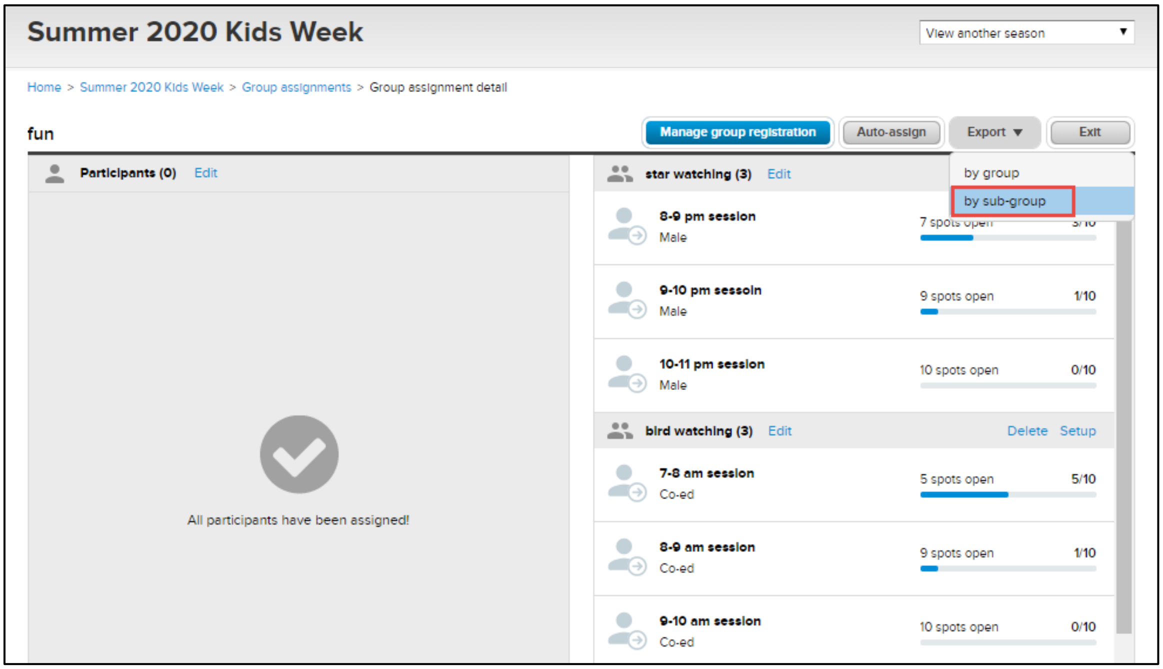

Home
People
Finance
Email
Membership
Add-ons
Summer 2020 Kids Week - Edit supplemental form
Form name
waiver
Instructions
Due date
Specific date
02/26/2020
The date selected is before today.
Collect information from
All participants
Participants in select sessions
Submission options
Participants in applicable sessions should be required to submit this item
Allow participants to submit this item after the due date
Type
Supplemental document
A document you would like registrants to upload in their online account.
Follow-up form
An online form filled out in the online account.
Supplemental document
waiver.docx
Replace template
Delete template
Registrants will scan and upload their own document based on the instructions provided.

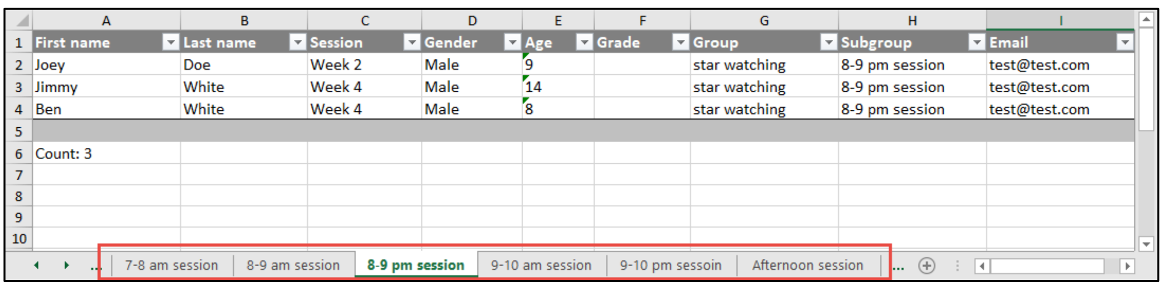


Automated Group Assignment

The following enhancements to the automated group assignment feature (Admin Site > **Home** > a season > **Group assignment** tab) have been implemented:

- Previously, agency users could only export a group type's group assignment report by group (required group type > **Export** button > **by group**). Now, they can also export the report **by sub-group**:





First name	Last name	Session	Gender	Age	Grade	Group	Subgroup	Email
Joey	Doe	Week 2	Male	9		star watching	8-9 pm session	test@test.com
Jimmy	White	Week 4	Male	14		star watching	8-9 pm session	test@test.com
Ben	White	Week 4	Male	8		star watching	8-9 pm session	test@test.com
Count: 3								

- Previously, if group-level **Gender**, **Age restriction** or **Grade restriction** were configured (required group > **Setup** link), then these restrictions applied to all sub-groups (required group > **Edit** link) and could not be overridden. Also, if the **Gender**, **Grade** or **Age** restrictions were configured at the sub-group level, then they were disabled and could not be edited at the group level. Now, agency users can edit sub-group restrictions regardless of the group-level restrictions, and vice versa.
  - Editing group-level or sub-group restrictions will remove all previously assigned participants from their assigned groups/sub-groups.
  - Changes to group-level restrictions apply to both the Online Registration Site group selection and Admin Site group assignment workflows.

- Changes to sub-group restrictions do not affect the Online Registration Site group selection workflow, but only apply to the Admin Site group assignment workflow.

Indirect Sales Tax

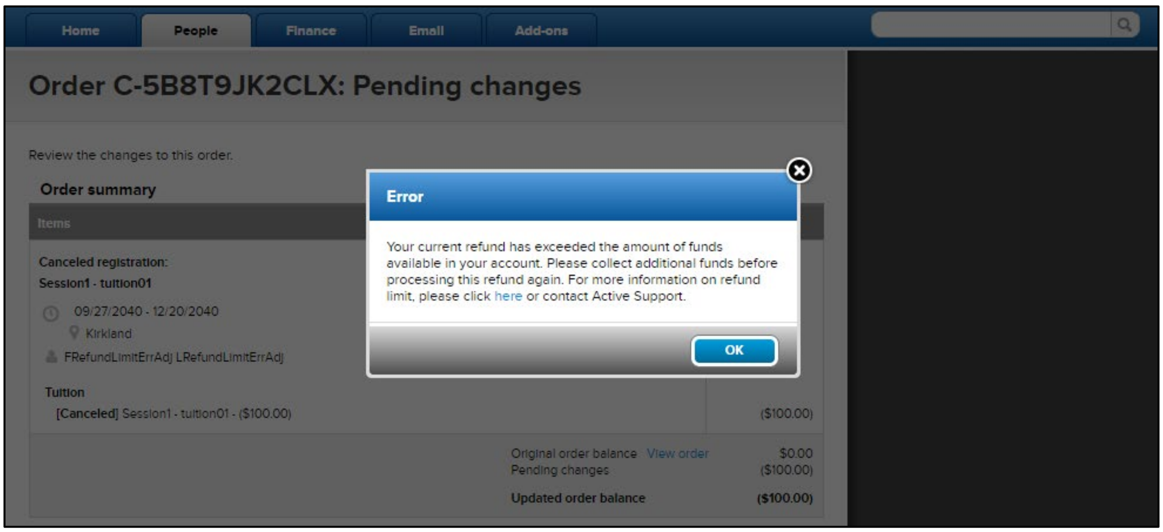
For agencies that are not tax exempt and have configured their processing fees to be absorbed by their customers, an indirect sales tax is charged on orders that have processing fees. In the following Admin Site workflows, fields that include processing fees now correctly include indirect sales taxes passed on to customers:

- Session overview:
  - Session dashboard > **Revenue** section > **Total**
  - Session dashboard > **Registrations** section > **Balance**
  - Session dashboard > **Registrations** section > a registrant > **Season balance**
  - Session dashboard > **Registrations** section > a registrant > **Registrations and attendance** section > **Balance**
- Family view:
  - **Order history** section > **Total**/**Amount paid**/**Balance**
  - **Order history** section > an order > **Balance**/**Remaining balance**/**Processing fee**/**Amount paid**/**Total**
  - **Order history** section > an order > **View transactions** > **Processing fee**/**Additional processing fee**/**Total**
  - **Order history** section > an order > **View transactions** > **Adjust payment** popup
- Front-Desk-Registration (FDR) workflow:
  - **Review order and check out** page > **Total**/**Custom amount** alert message
  - Order details page > **Balance**/**Remaining balance**/**Processing fee**/**Amount paid**/**Total**
  - **Make a payment** page > **Processing fee**/**Recommended payment amount**
  - **Make a payment** page > **Manage allocation** popup > **Total price**/**Balance**
  - Edit purchase **Change registration** page > **Amount paid**/**Remaining balance**/**Total**
  - Edit purchase **Pending changes** page > **Processing fee credit**/**Original order balance**/**Pending changes**/**Additional Processing fee**/**Updated order balance**/**Total amount due**
  - Edit purchase **Pending changes** page > **View order** popup
  - Edit purchase order details page > **Balance**/**Remaining balance**/**Processing fee**/**Amount paid**/**Total**
- Membership purchase workflow:

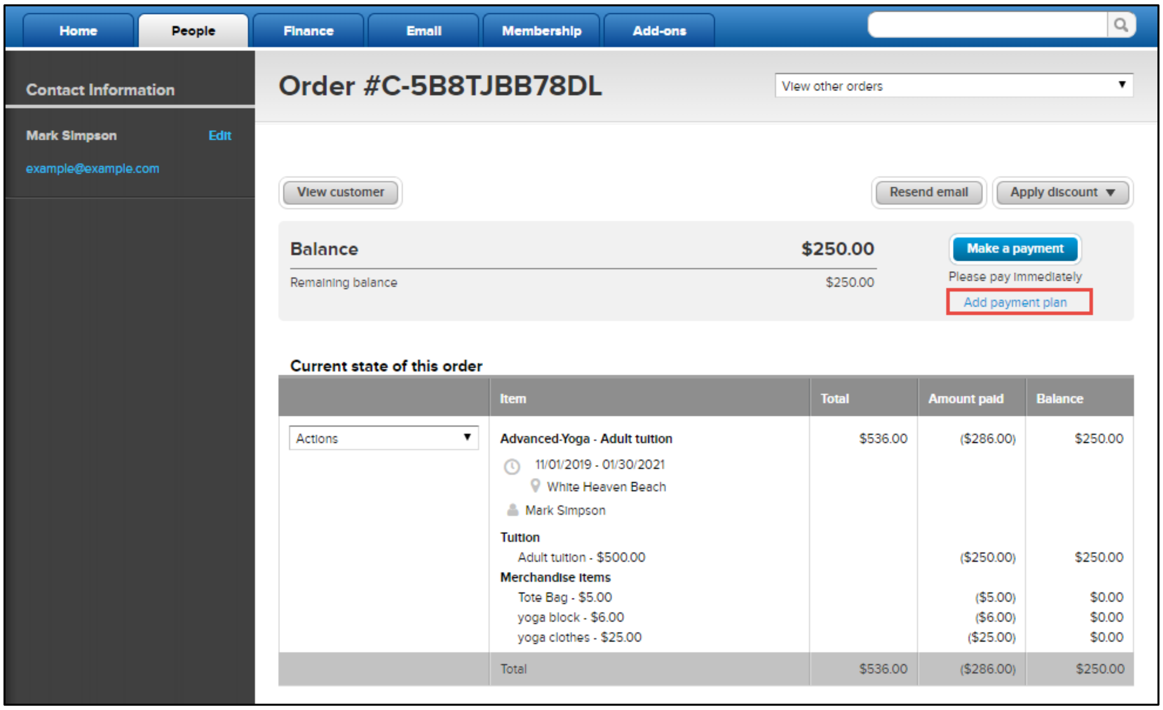
  - Membership purchase **Order summary** page > **View order** popup
  - **Cancel membership** page
  - Order of a membership purchase > **Current state of this order** > **Total**
  - Membership order payment workflow
  - Membership auto-renewal workflow
- Canceling order workflow
  - **Cancel registration** page > **Total** / **Amount paid** / **Remaining balance**
  - Cancel registration **Pending changes** page > **Original order balance** / **Updated order balance**
  - Cancel registration **Pending changes** page > **View order** popup
  - Canceled-order details page > **Total**/**Amount paid**
- Transferring order workflow:
  - **Transfer to another session** page > **Total**/**Amount paid**/**Remaining balance**
  - Transfer registration **Pending changes** page > **Processing fee credit**/**Original order balance**/**Pending changes**/**Additional Processing fee**/**Updated order balance**/**Total amount due**
  - Transfer registration **Pending changes** page > **View order** popup > **Processing fee**/**Total**/**Balance**
  - Order details page > **Balance**/**Remaining balance**/**Processing fee**/**Amount paid**/**Total**
- Applying (or removing) discount/coupon workflow:
  - Apply (or remove) discount/coupon **Pending changes** page > **Original order balance**/**Updated order balance**/**Total amount due**
  - Apply (or remove) discount/coupon **Pending changes** page > **View order** popup
  - Apply (or remove) discount/coupon order details page > **Balance**/**Remaining balance**/**Processing fee**/**Amount paid**/**Total**
- Email workflow:
  - Email **Subject**/**Design** phase > **{Family balance}**/**{Registration balance}**/**{Season balance}** merge fields
- Season-level reports:
  - **Check-In report** > **Reg Balance**/**Total**
  - **Registration form report** > **Balance**
  - **Participant attendance report** > **Balance**
  - Custom reports > **Balance**/**Paid**/**Sold**/**Active fee paid by registrant**

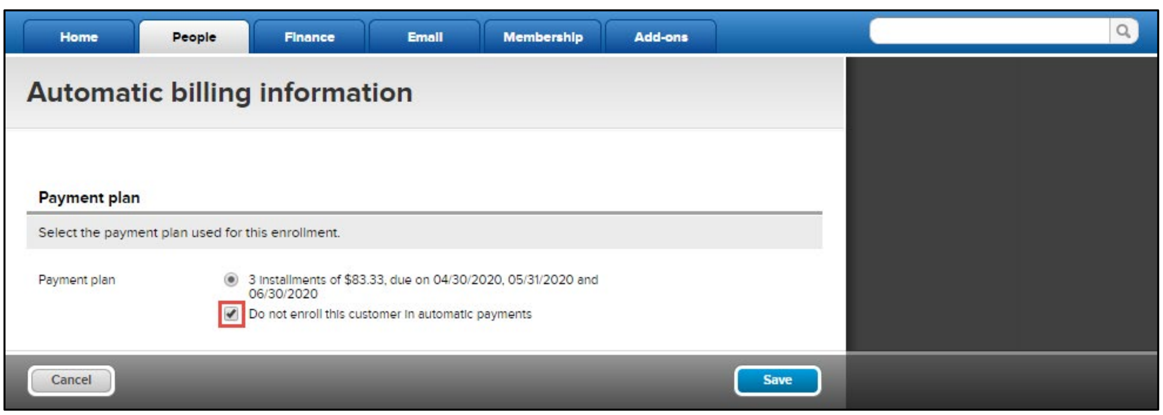
Miscellaneous Enhancements

In the Admin Site, when agency users process a refund (such as canceling an order, refunding a credit balance, transferring a registration or canceling a membership package), if the agency has exceeded their refund limit, then an error message is displayed with a link to the new **Refund Limit** help article:



Now, when agency users add a payment plan to an existing FDR order (by clicking the order details page > **Add payment plan** link), if the **Do not enroll this customer in automatic payments** checkbox is checked, then the **Payment information** and **Payer information** sections are hidden so that the order can be completed without entering credit card or other payment information:


Home
People
Finance
Email
Membership
Add-ons
Contact Information
Mark Simpson
Edit
example@example.com
Order #C-5B8TJBB78DL
View other orders
View customer
Resend email
Apply discount
Balance
$250.00
Remaining balance
$250.00
Make a payment
Please pay immediately
Add payment plan
Current state of this order
Item
Total
Amount paid
Balance
Actions
Advanced-Yoga - Adult tuition
$536.00
($286.00)
$250.00
11/01/2019 - 01/30/2021
White Heaven Beach
Mark Simpson
Tuition
Adult tuition - $500.00
($250.00)
$250.00
Merchandise items
Tote Bag - $5.00
($5.00)
$0.00
yoga block - $6.00
($6.00)
$0.00
yoga clothes - $25.00
($25.00)
$0.00
Total
$536.00
($286.00)
$250.00


Home
People
Finance
Email
Membership
Add-ons
Automatic billing information
Payment plan
Select the payment plan used for this enrollment.
Payment plan
3 installments of $83.33, due on 04/30/2020, 05/31/2020 and 06/30/2020
Do not enroll this customer in automatic payments
Cancel
Save

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.

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