

Cross Season Reporting

6/11/2019

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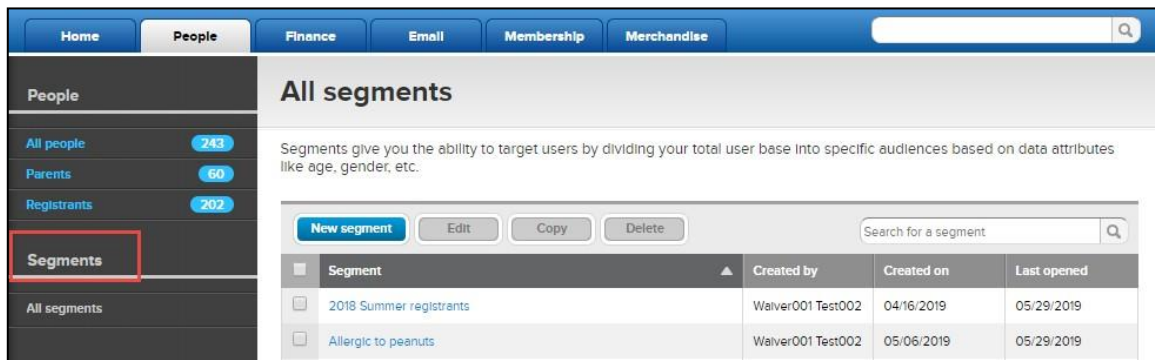
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CROSS-SEASON REPORTING


To increase efficiency and provide better marketing analysis and targeted services, a new **Cross-season reporting** feature is now available under the Admin site > **People** tab for agency users to group target users based on specific attributes such as age, gender or registered seasons and sessions. Agency users can now:

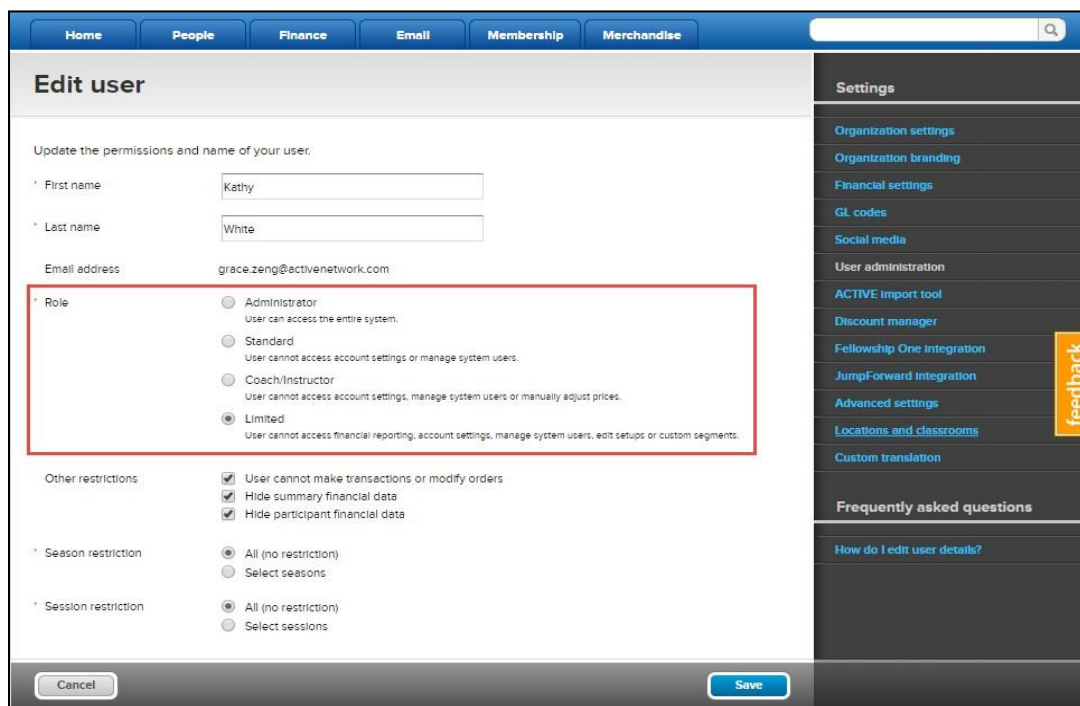
- Create up to 100 custom segments by registered season, session or people attributes.
- Filter and view a complete list of registrants that meet the search criteria of a saved segment.
- Generate a report containing registrant data.
- Send a targeted e-mail campaign to people in a segment.



For instructors and system users, the following access restrictions apply:

- Instructors or contacts: No access to the **Segments** feature.
- System users with the **Limited** role: No access to the **Segments** feature.

Agency administrators or Active users can modify a system user's access privileges at: Admin site >  > **Settings** > **User administration** link > **System users** tab > a system user > **Edit** link > **Role**



- System users (other than the **Limited** role) with access to specific seasons or sessions can only view people filtered from those seasons and sessions visible to them.

For example: Segment 1 is set up to include people from Seasons A, B and C.

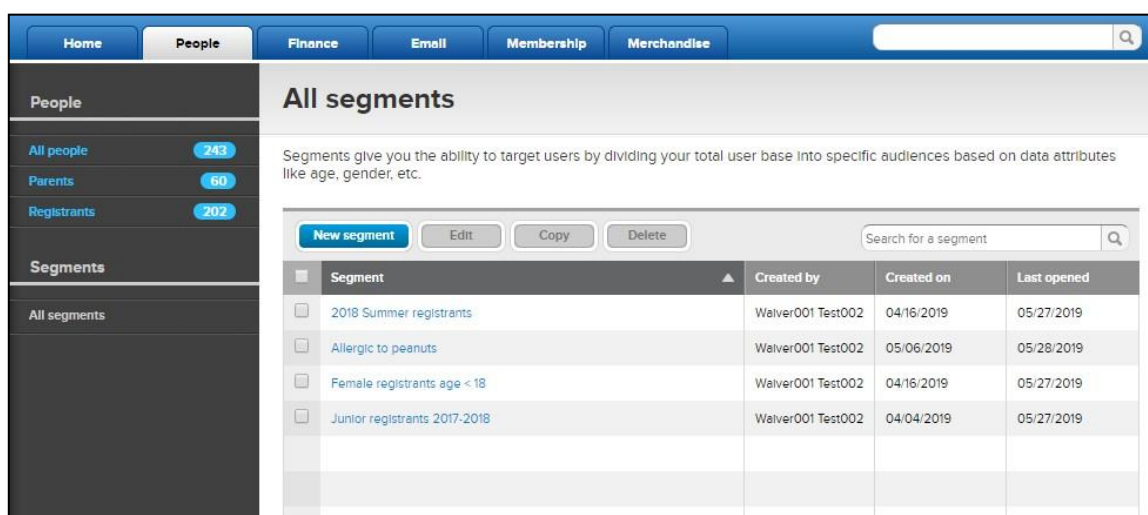
- If a system user cannot access Season A, then after clicking Segment 1, he or she:
 - Can only see people filtered from Seasons B and C.
 - Cannot edit, delete, copy or pin (as a frequently used segment) Segment 1 (see [Managing existing segments](#) for more information).
 - Can only send emails to people or export demographic information filtered from Seasons B and C (see [emailing](#) or [exporting a segment](#) for more information).
 - Can set up a new segment, but cannot select Season A as a filter criterion (see [Setting up a new segment](#) for more information).
- If a system user cannot access Seasons A, B and C, then he or she:
 - Cannot access Segment 1 (the link is disabled).
 - Can set up a new segment, but cannot select Seasons A, B or C as filter criteria.
- If a system user has access to Seasons A, B and C, then he or she:
 - Has full access to view, edit, delete, copy or pin (as a frequently used segment) Segment 1.
 - Has full access when setting up a new segment.

Note: Descriptions in the following sections are based on a user with full access.

Viewing Existing Segments

Agency users can view existing segments by clicking the Admin site > **People** tab > **Segments** > **All segments** link. If no segment exists, then a **Create your first segment** button is displayed, which opens the **New segment** page (see [Setting up a new segment](#) for more information).

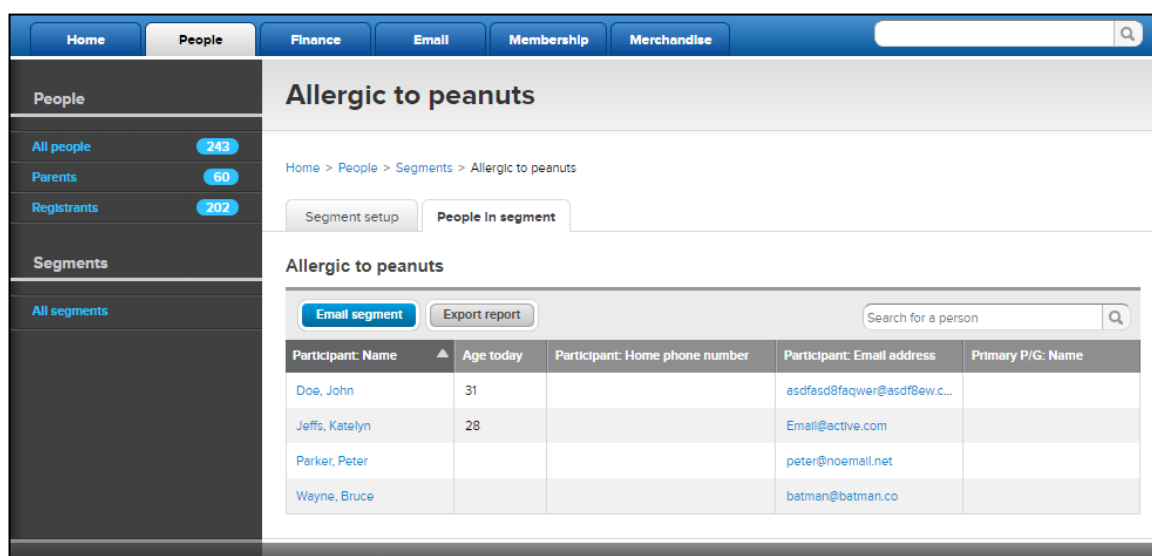
On the **All segments** page, agency users can search for a segment by segment name, creation date, creator name and last opened date.



The screenshot shows the 'All segments' page. The top navigation bar includes 'Home', 'People', 'Finance', 'Email', 'Membership', and 'Merchandise'. The left sidebar shows 'People' selected, with 'All people' (243), 'Parents' (60), and 'Registrants' (202) listed. The 'Segments' section is also visible. The main content area shows a list of segments with columns for Segment, Created by, Created on, and Last opened. The segments listed are: 2018 Summer registrants, Allergic to peanuts, Female registrants age < 18, and Junior registrants 2017-2018. Each segment is created by 'Walver001 Test002'.

When clicking a saved segment (Admin site > **People** tab > **Segments** > **All segments** link > a saved segment), the **People in segment** tab is displayed by default. People who registered normally or are waitlisted and match the segment criteria are listed. Each column is sortable by clicking the column header.

Agency users can search for a registrant by name, age, phone number, email or primary parent or guardian name. Clicking a participant or the parent or guardian name opens the family view page.



The screenshot shows the 'Allergic to peanuts' segment page. The top navigation bar includes 'Home', 'People', 'Finance', 'Email', 'Membership', and 'Merchandise'. The left sidebar shows 'People' selected, with 'All people' (243), 'Parents' (60), and 'Registrants' (202) listed. The 'Segments' section is also visible. The main content area shows a list of participants with columns for Participant Name, Age today, Participant Home phone number, Participant Email address, and Primary P/G Name. The participants listed are: Doe, John (Age 31), Jeffs, Katelyn (Age 28), Parker, Peter, and Wayne, Bruce. Each participant is associated with an email address.

Setting Up a New Segment

In the Admin site, agency users can set up a new segment following the steps below:

1. Click the **People** tab > **Segments** > **All segments** link > **New segment** button. The **New segment** page opens:

The screenshot shows the 'New segment' page in the Admin site. The page has a top navigation bar with tabs: Home, People, Finance, Email, Membership, and Merchandise. The 'People' tab is selected. On the left, there is a sidebar with 'People' and 'Segments' sections. Under 'People', there are links for 'All people' (243), 'Parents' (60), and 'Registrants' (202). Under 'Segments', there is a link for 'All segments'. The main content area is titled 'New segment' and has a breadcrumb trail: Home > People > Segments > Segment setup. There are two tabs: 'Segment setup' (selected) and 'People in segment'. Below the tabs, there is a section for 'Basic settings' with a text input for 'Segment name' containing '2018 frequent registrants' and a character count of '34 characters left'. Below this is a section for 'Segment conditions' with a dropdown for 'Registered for' set to 'all' and a dropdown for 'selected seasons/sessions:' set to 'Dance 2018 and 3 others'. There are checkboxes for 'Select seasons' and radio buttons for 'Select all sessions' and 'Select sessions'. Below this is a section for 'NOT registered for any following seasons:' with a dropdown for 'Select seasons' and radio buttons for 'Select all sessions' and 'Select sessions'. At the bottom, there is a '+ Add conditions' button and 'Cancel' and 'Save' buttons.

2. Under **Basic settings**, enter the **Segment name**.
3. Under **Segment conditions**, to set the season and session filters, check the relevant season checkboxes and session radio buttons, and then select seasons and sessions from the dropdown list. Conditions include:

- Seasons (Note: At least one season must be selected before saving a segment)
 - Registered for all or any of the selected seasons.
 - Not registered for all of the selected seasons.
 - Sessions
 - Registered for any of the selected sessions.
 - Not registered for all of the selected sessions.
4. To add additional filters to the segment, click the **+ Add conditions** link and select the required filter criteria from the dropdown list. The following filters are available:
- Birthday
 - Custom question (Note: Only custom questions belonging to the filtered seasons are listed. Each segment can have a maximum of three custom questions, and a question can only be selected once.)
 - Date of birth
 - Gender
 - Registration date

For example:

People who match All following conditions:

- ⊖ Birthday is Jan 1st
- ⊖ Custom question is Participant: Do you have any medical... None of the above
- ⊖ Registration date is between 04/01/2019 and 05/01/2019

⊕ [Add conditions](#)

5. Click **Save** to save the segment. People who match all season, session and additional condition filters are then filtered and displayed under the **People in segment** tab.

Home | **People** | Finance | Email | Membership | Merchandise

People

- All people 243
- Parents 60
- Registrants 202

Segments

- All segments

2018 frequent registrants

Home > People > Segments > 2018 frequent registrants

Segment setup | **People in segment**





2018 frequent registrants

[Email segment](#) | [Export report](#) |

Participant: Name	Age today	Participant: Home phone number	Participant: Email address	Primary P/G: Name
Anderson, Brian	20	2142402429	branders21@hotmail.com	
Dancer, Rumba	38	2142402429	fasdf834er90sfAZSDfwe@a...	Anderson, Brian
Kelly, Grace	42		noahskocilich-monicadema...	
White, Kathy	37	4044341234	1790303374@qq.com	

The following examples show how to set up the **Segment conditions** for specific scenarios:

Scenario	Segment conditions setup flow
Filter people who are:	1. For the Registered for condition, select <i>any</i> from the dropdown list.

<ul style="list-style-type: none"> Registered in session A or session B or both in season A, OR session C or D or both in season B. 	<ol style="list-style-type: none"> Under the Registered for section, check the Select seasons checkbox, and then select <i>season A</i> and <i>season B</i> from the dropdown list. Check the Select sessions radio button. Click the  icon, and then select <i>sessions A, B, C</i> and <i>D</i>.
<p>Filter people who are:</p> <ul style="list-style-type: none"> Registered in any session in season A, AND any session in season B. 	<ol style="list-style-type: none"> For the Registered for condition, select <i>all</i> from the dropdown list. Under the Registered for section, check the Select seasons checkbox, and then select <i>season A</i> and <i>season B</i> from the dropdown list. Check the Select all sessions radio button.
<p>Filter people who are:</p> <ul style="list-style-type: none"> Not registered in session A or session B or both in season A. 	<ol style="list-style-type: none"> Under the NOT registered for section, check the Select seasons checkbox, and then select <i>season A</i> from the dropdown list. Check the Select sessions radio button. Click the  icon, and then select both <i>session A</i> and <i>session B</i>.
<p>Filter people who are:</p> <ul style="list-style-type: none"> Registered in the 2018 football season, sessions level 1 or level 2 or both. Not registered in any sessions in the 2019 football season. 	<ol style="list-style-type: none"> Under the Registered for section, check the Select seasons checkbox, and then select <i>2018 football</i> from the dropdown list. Check the Select sessions radio button. Click the  icon, and then select <i>level 1</i> and <i>level 2</i>. Under the NOT registered for section, check the Select seasons checkbox, and then select <i>2019 football</i> from the dropdown list. Check the Select all sessions radio button.
<p>Filter people who are:</p> <ul style="list-style-type: none"> Male. Registered in sessions A, B and C of season A. Registered between December 1st 2018 and January 1st 2019. 	<ol style="list-style-type: none"> For the Registered for condition, select <i>all</i> from the dropdown list. Under the Registered for section, check the Select seasons checkbox, and then select <i>season A</i> from the dropdown list. Check the Select sessions radio button. Click the  icon, and then select <i>session A</i>, <i>session B</i> and <i>session C</i>. Click the + Add conditions link. For the People who match condition, select <i>All</i> from the dropdown list. From the Select a condition dropdown list, select the <i>Gender > Male</i> option. Click the + Add conditions link again. From the Select a condition dropdown list, select the <i>Registration date > is between xx date and xx date</i> option. Enter or select <i>December 1st 2018</i> and <i>January 1st 2019</i> as the start and end dates.

Filter people who have:

- Registered for season A or B.
- Either answered the question “What's your favorite color?” with the answer “White”.
- Or answered the question “Do you like the Camps class introduced?” with any answer.

1. For the **Registered for** condition, select *any* from the dropdown list.
2. Under the **Registered for** section, check the **Select seasons** checkbox, and then select *season A* and *season B* from the dropdown list.
3. Check the **Select all sessions** radio button.
4. Click the **+ Add conditions** link.
5. For the **People who match** condition, select *Any* from the dropdown list.
6. From the **Select a condition** dropdown list, select the *Custom question > What's your favorite color? > White* option.
7. Click the **+ Add conditions** link again.
8. From the **Select a condition** dropdown list, select the *Custom question > Do you like the Camps class introduced? > Any* option.

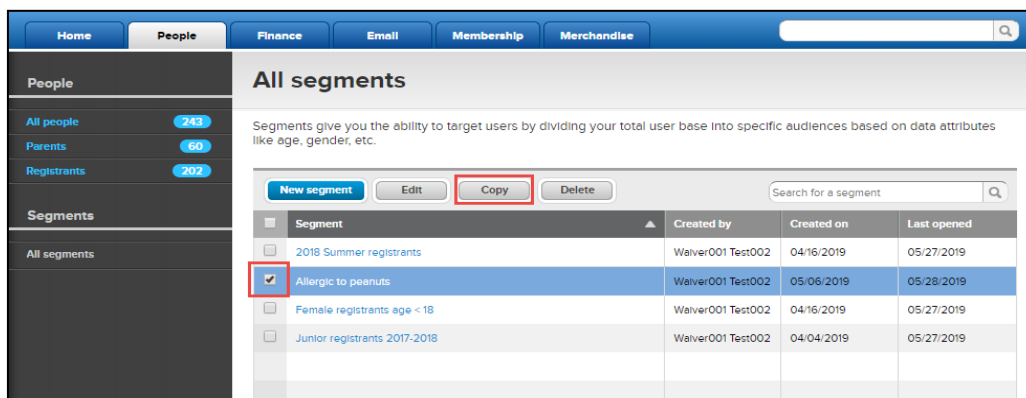
Managing Existing Segments

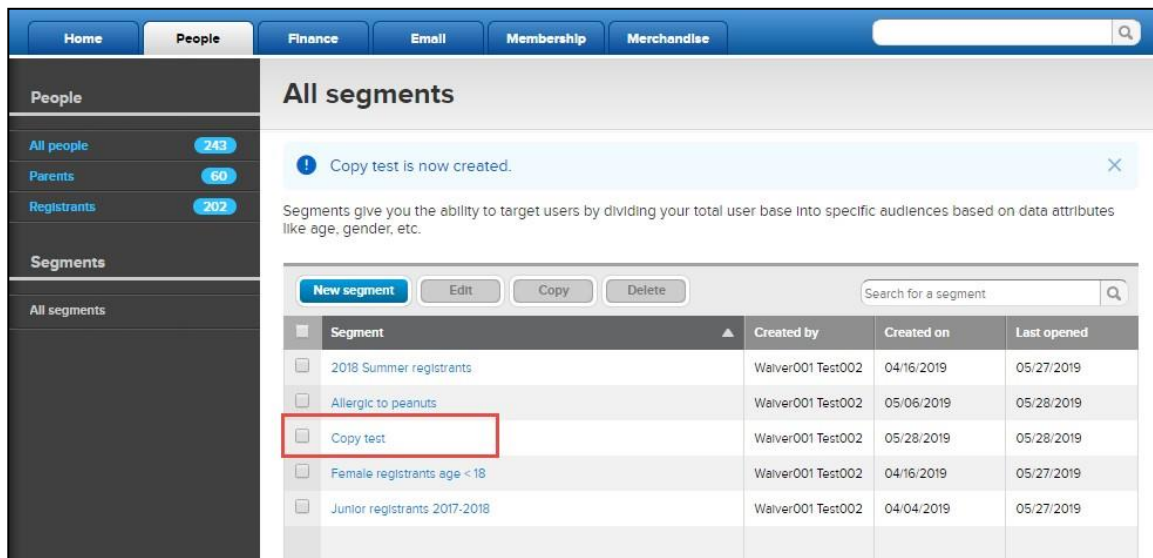
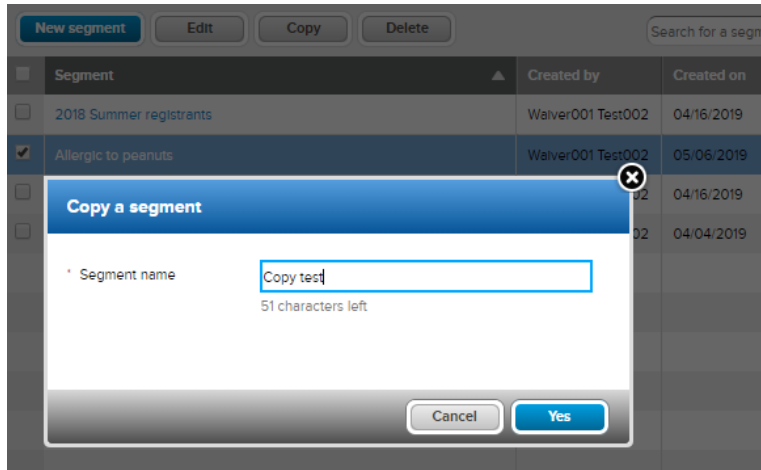
Copying a segment

Agency users can create a new segment by copying an existing segment, and then change segment settings as required.

To copy an existing segment:

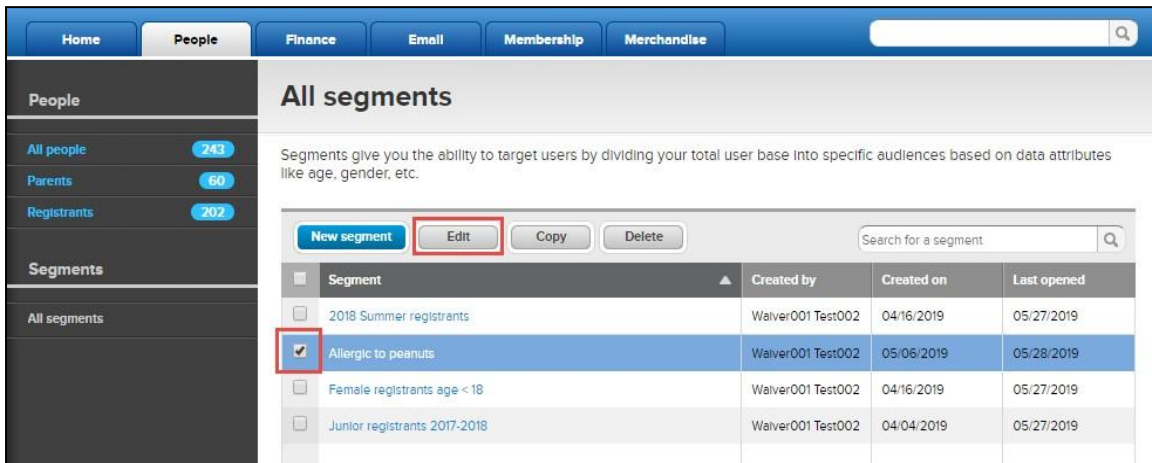
1. On the Admin site > **People** tab > **Segments** > **All segments** page, check the segment to be copied.
2. Click **Copy**.
 - Users can only select and copy one segment at a time.
 - If 100 segments already exist, then a warning will pop up to prevent the copy.
3. On the **Copy a segment** popup, enter the new **Segment name**, and then click **Yes**.
4. To change the new segment settings, on the **All segments** page, click the newly copied segment name > **Segment setup** tab.





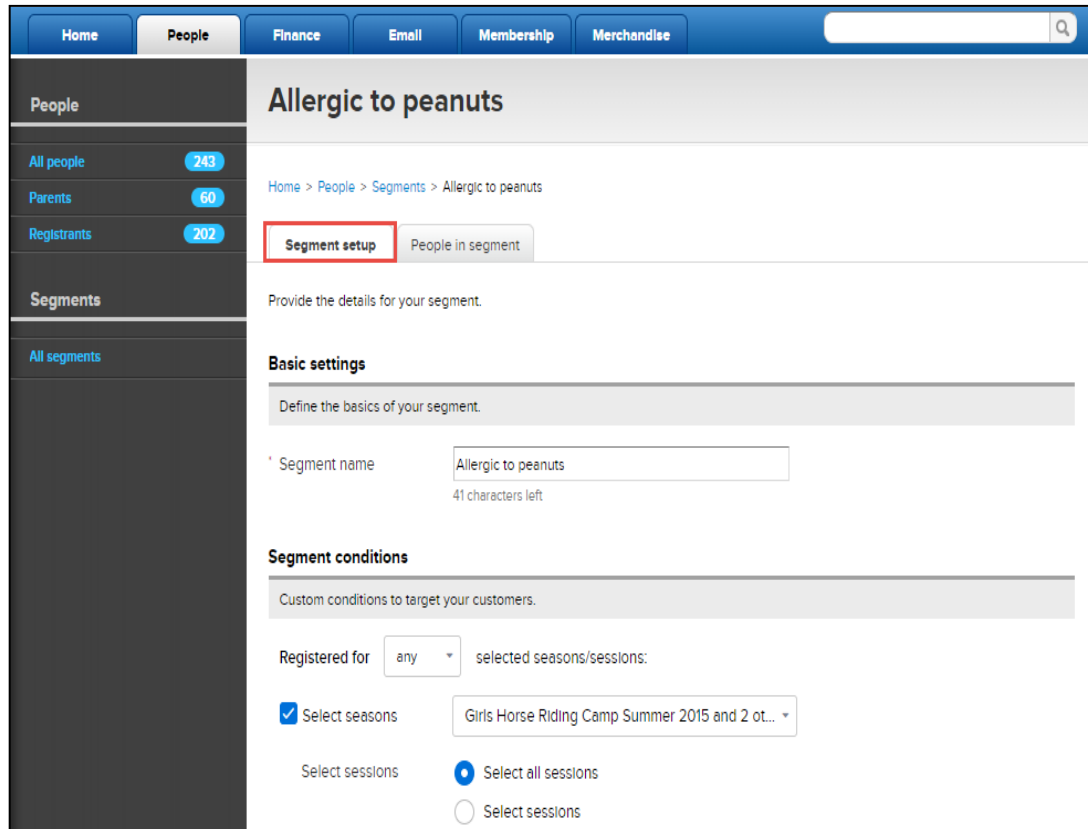
Editing a segment

Agency users can edit an existing segment's name and filter conditions by selecting the required segment and then clicking the **Edit** button > **Segment setup** tab.



The screenshot shows the 'All segments' page. The left sidebar has a 'People' section with 'All people' (243), 'Parents' (60), and 'Registrants' (202). Below it is a 'Segments' section with 'All segments'. The main content area is titled 'All segments' and includes a description: 'Segments give you the ability to target users by dividing your total user base into specific audiences based on data attributes like age, gender, etc.' Below this is a toolbar with 'New segment', 'Edit' (highlighted with a red box), 'Copy', and 'Delete' buttons. A search bar is also present. A table lists segments:

Segment	Created by	Created on	Last opened
<input type="checkbox"/> 2018 Summer registrants	Walver001 Test002	04/16/2019	05/27/2019
<input checked="" type="checkbox"/> Allergic to peanuts	Walver001 Test002	05/06/2019	05/28/2019
<input type="checkbox"/> Female registrants age < 18	Walver001 Test002	04/16/2019	05/27/2019
<input type="checkbox"/> Junior registrants 2017-2018	Walver001 Test002	04/04/2019	05/27/2019



The screenshot shows the 'Allergic to peanuts' segment setup page. The left sidebar is the same as the previous screenshot. The main content area is titled 'Allergic to peanuts' and includes a breadcrumb trail: 'Home > People > Segments > Allergic to peanuts'. Below this is a tabbed interface with 'Segment setup' (highlighted with a red box) and 'People in segment' tabs. The 'Segment setup' tab contains the following sections:

Provide the details for your segment.

Basic settings

Define the basics of your segment.

* Segment name: Allergic to peanuts (41 characters left)

Segment conditions


Custom conditions to target your customers.

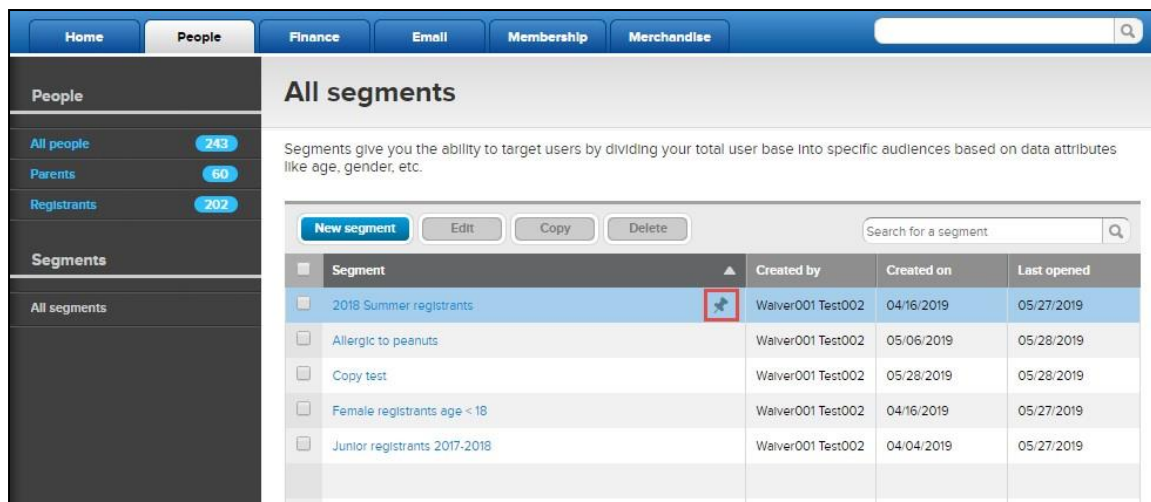
Registered for: any selected seasons/sessions:

☒ Select seasons: Girls Horse Riding Camp Summer 2015 and 2 ot... ▼

Select sessions: ☒ Select all sessions ☐ Select sessions

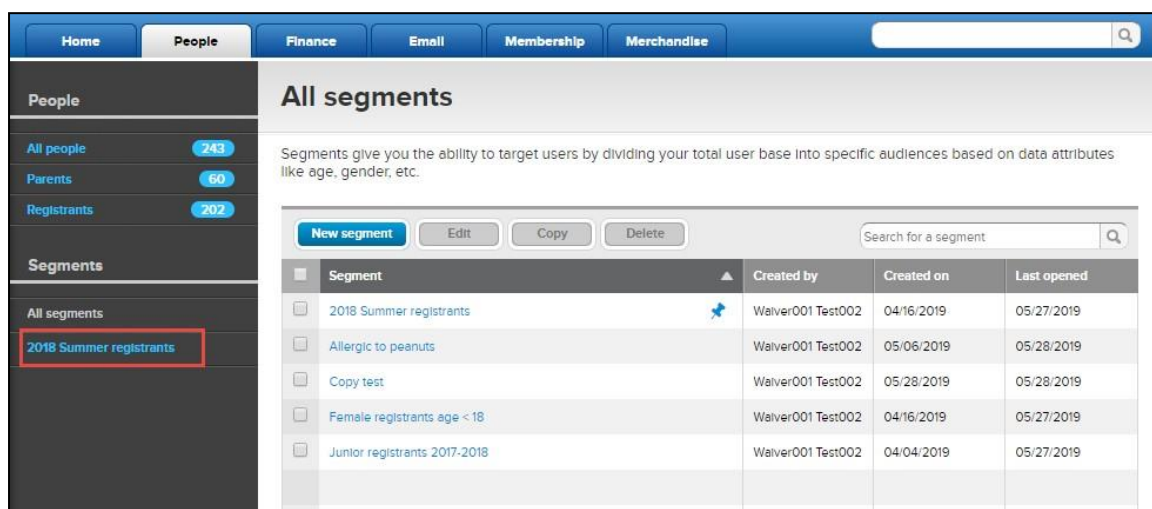
Pinning a segment

On the **All segments** page, agency users can pin up to five frequently-used segments on the left navigation pane by hovering the cursor over a segment, and then clicking the  icon. Pinned segments are listed for quick access under the **People** tab > **Segments** section:





The screenshot shows the 'All segments' page. The left navigation pane has a 'People' tab selected, showing 'All people' (243), 'Parents' (60), and 'Registrants' (202). The 'Segments' section is expanded, showing 'All segments'. The main content area is titled 'All segments' and includes a description: 'Segments give you the ability to target users by dividing your total user base into specific audiences based on data attributes like age, gender, etc.' Below this is a table of segments. The '2018 Summer registrants' segment is highlighted, and a pin icon is visible next to its name.

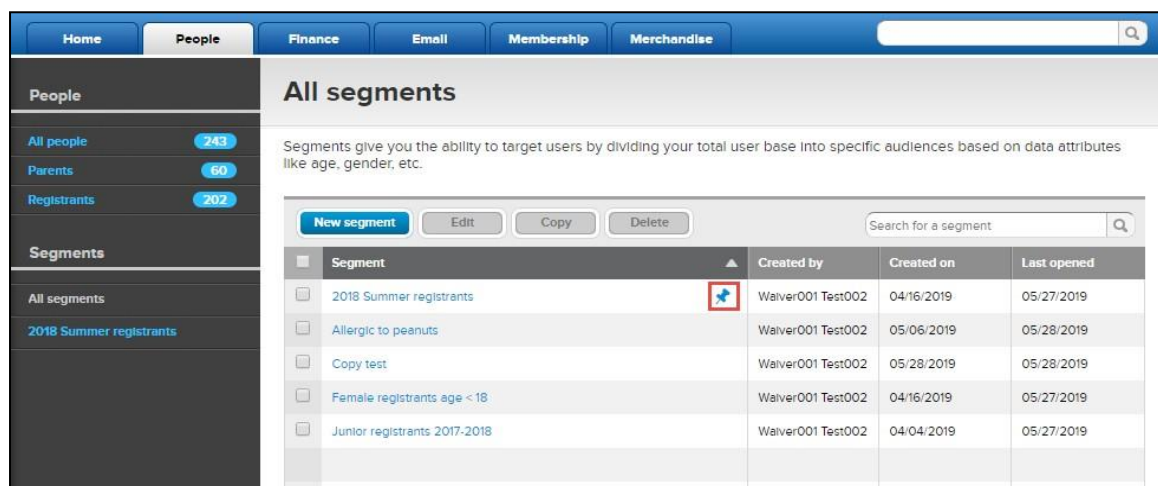
Segment	Created by	Created on	Last opened
2018 Summer registrants	Waiver001 Test002	04/16/2019	05/27/2019
Allergic to peanuts	Waiver001 Test002	05/06/2019	05/28/2019
Copy test	Waiver001 Test002	05/28/2019	05/28/2019
Female registrants age < 18	Waiver001 Test002	04/16/2019	05/27/2019
Junior registrants 2017-2018	Waiver001 Test002	04/04/2019	05/27/2019



The screenshot shows the 'All segments' page after the '2018 Summer registrants' segment has been pinned. The left navigation pane now shows '2018 Summer registrants' under the 'Segments' section, highlighted with a red box. The main content area shows the same table of segments, but the '2018 Summer registrants' segment now has a pin icon next to its name.

Segment	Created by	Created on	Last opened
2018 Summer registrants	Waiver001 Test002	04/16/2019	05/27/2019
Allergic to peanuts	Waiver001 Test002	05/06/2019	05/28/2019
Copy test	Waiver001 Test002	05/28/2019	05/28/2019
Female registrants age < 18	Waiver001 Test002	04/16/2019	05/27/2019
Junior registrants 2017-2018	Waiver001 Test002	04/04/2019	05/27/2019

Once a segment is pinned, on the **All segments** page, a  icon is displayed next to the segment name. To un-pin and remove the segment from the left navigation pane, click the  icon:



The screenshot shows the 'All segments' page after the '2018 Summer registrants' segment has been pinned. The left navigation pane now shows '2018 Summer registrants' under the 'Segments' section, highlighted with a red box. The main content area shows the same table of segments, but the '2018 Summer registrants' segment now has a pin icon next to its name.

Segment	Created by	Created on	Last opened
2018 Summer registrants	Waiver001 Test002	04/16/2019	05/27/2019
Allergic to peanuts	Waiver001 Test002	05/06/2019	05/28/2019
Copy test	Waiver001 Test002	05/28/2019	05/28/2019
Female registrants age < 18	Waiver001 Test002	04/16/2019	05/27/2019
Junior registrants 2017-2018	Waiver001 Test002	04/04/2019	05/27/2019

Deleting segments

Agency users can delete one or more segments by selecting the required segments and then clicking the **Delete** button.

Home

People

Finance

Email

Membership

Merchandise

People

All people243

Parents60

Registrants202

Segments

All segments

All segments

Segments give you the ability to target users by dividing your total user base into specific audiences based on data attributes like age, gender, etc.

New segment

Edit

Copy

Delete

Search for a segment

	Segment	Created by	Created on	Last opened
<input checked="" type="checkbox"/>	2018 Summer registrants	Waiver001 Test002	04/16/2019	05/27/2019
<input checked="" type="checkbox"/>	Allergic to peanuts	Waiver001 Test002	05/06/2019	05/28/2019
<input type="checkbox"/>	Copy test	Waiver001 Test002	05/28/2019	05/28/2019
<input type="checkbox"/>	Female registrants age < 18	Waiver001 Test002	04/16/2019	05/27/2019
<input type="checkbox"/>	Junior registrants 2017-2018	Waiver001 Test002	04/04/2019	05/27/2019

Emailing People in a Segment

If a segment contains registrants, then agency users can send targeted emails to all registrants matching the segment setup by clicking the segment > **Email segment** button.

The screenshot shows the 'Allergic to peanuts' segment page. The left sidebar lists 'People' (243), 'Parents' (60), and 'Registrants' (202). The main content area has tabs for 'Segment setup' and 'People in segment'. The 'Email segment' button is highlighted with a red box. Below it is a table of participants in the segment.

Participant: Name	Age today	Participant: Home phone number	Participant: Email address	Primary P/G: Name
Doe, John	31		asdfasd8faqwer@asdf8ew.c...	
Jeffs, Katelyn	28		Email@active.com	
Parker, Peter			peter@noemail.net	
Wayne, Bruce			batman@batman.co	

The new email workflow is displayed, with the registrants in the segment listed as recipients.

The screenshot shows the 'Allergic to peanuts' segment page with the 'Email segment' button highlighted. A 'Create email' dialog box is open in the foreground, showing options to 'Create an email' (selected) or 'Select an existing template'. The dialog box has 'Cancel' and 'OK' buttons.

Home > People > Segments > Allergic to peanuts > Email segment

Email information Design Preview & Send

Subject *

From Public Contact (public@public.com)

Recipient **Allergic to peanuts**
4 unique recipients

Description * Briefly describe the purpose of this email
For internal reference only, email recipients will not see this description.

Exporting a Segment

If a segment contains registrants, then agency users can export selected registrant information to an Excel report by clicking the segment > **Export report** button:

Home > People > Segments > Allergic to peanuts

Segment setup People in segment

Allergic to peanuts

Email segment **Export report** Search for a person

Participant Name	Age today	Participant Home phone number	Participant Email address	Primary P/G Name
Doe, John	31		asdfsdf8faqwer@asdfsdf.c...	
Jeffs, Katelyn	28		Email@active.com	
Parker, Peter			peter@noemail.net	
Wayne, Bruce			batman@batman.co	

In the **Choose columns** popup > **Available columns** section, customizable columns including information on registrants, primary and secondary parents/guardians, and custom questions are displayed.

- To add columns to a report, under **Available columns**, select the required columns and then click
- To remove columns from the report, under **Selected columns**, select the required columns and then click

Allergic to peanuts

Home > People > Segments > Allergic to peanuts

Choose columns

Available columns		Selected columns
<input checked="" type="checkbox"/> Participant: Address	<input type="button" value="▶"/> <input type="button" value="◀"/>	<input type="checkbox"/> Participant: Name
<input type="checkbox"/> Participant: Address 1		<input type="checkbox"/> Age today
<input type="checkbox"/> Participant: Address 2		<input type="checkbox"/> Participant: Home phone number
<input checked="" type="checkbox"/> Participant: City		<input type="checkbox"/> Participant: Email address
<input type="checkbox"/> Participant: Control question		<input type="checkbox"/> Primary P/G: Name
<input type="checkbox"/> Participant: Date of birth		
<input type="checkbox"/> Participant: Do you like music		
<input type="checkbox"/> Participant: Do you really like bikin...		
<input checked="" type="checkbox"/> Participant: Gender		
<input type="checkbox"/>		

Reset to default Add a blank column

Column label

Cancel Save and download report

Choose columns

Available columns		Selected columns
<input type="checkbox"/> Participant: Address 1	<input type="button" value="▶"/> <input type="button" value="◀"/>	<input type="checkbox"/> Participant: Name
<input type="checkbox"/> Participant: Address 2		<input type="checkbox"/> Age today
<input type="checkbox"/> Participant: Control question		<input type="checkbox"/> Participant: Home phone number
<input type="checkbox"/> Participant: Date of birth		<input type="checkbox"/> Participant: Email address
<input type="checkbox"/> Participant: Do you like music		<input type="checkbox"/> Primary P/G: Name
<input type="checkbox"/> Participant: Do you really like bikin...		<input type="checkbox"/> Participant: Address
<input type="checkbox"/> Participant: State		<input type="checkbox"/> Participant: City
<input type="checkbox"/> Participant: What Indian Restauran...		<input type="checkbox"/> Participant: Gender
<input type="checkbox"/> Participant: What kind of food do y...		
<input type="checkbox"/>		

Reset to default Add a blank column

Column label

Cancel Save and download report

To download the Excel report, click **Save and download report**. Selected columns are saved for future exports (Note: If a segment export includes custom question columns, then for future exports, the custom questions are displayed depending on the logged-in user's access restrictions).

AutoSave Off Segment Report - Allergic to peanuts.xlsx - Protected View - Excel Jiang, Kay

File Home Insert Page Layout Formulas Data Review View Help Search Share Comments

I6 :

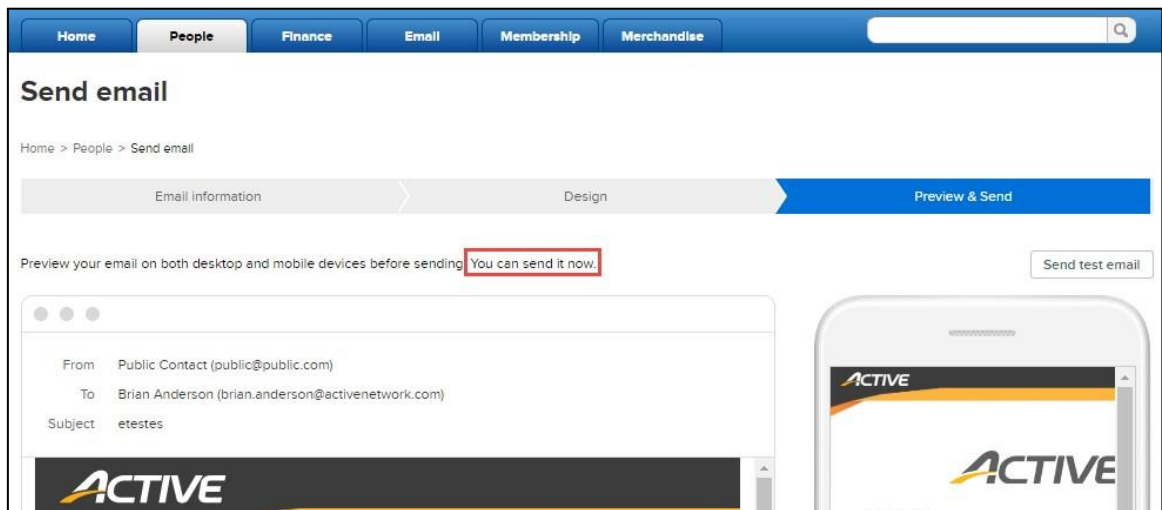
	A	B	C	D	E	F	G	H
1	Participant: Name	Age today	Participant: Home	Participant: Email	Primary P/G: Name	Participant: Address	Participant: City	Participant: Gender
2	Doe, John	31		asdfasd8faqwer@asd				
3	Jeffs, Katelyn	28		Email@active.com				
4	Parker, Peter			peter@noemail.net				
5	Wayne, Bruce			batman@batman.co				
6								
7	Count: 4							

PERFORMANCE ENHANCEMENTS

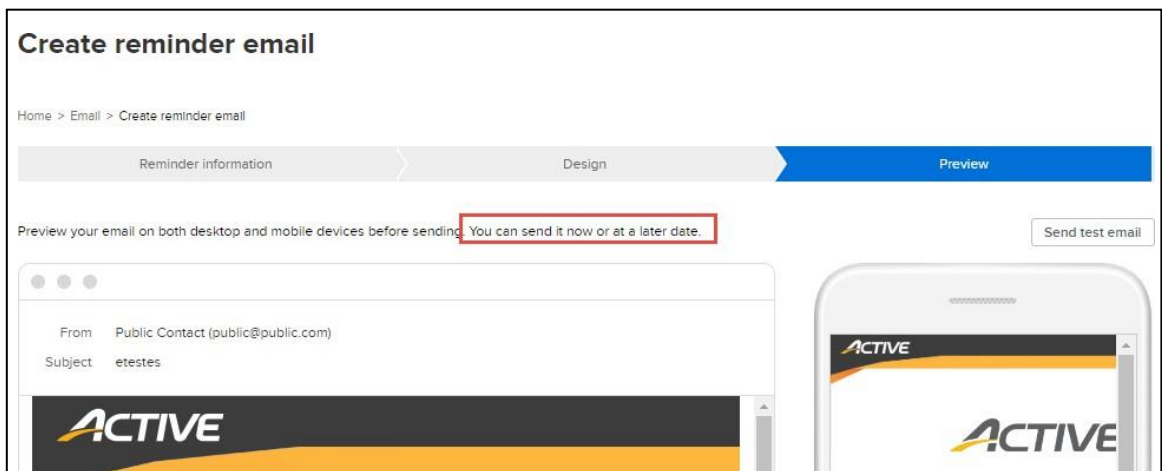
Communications Message Improvement

In the Admin site, in the final step to send an email, the UI copy has been improved to avoid confusion between whether the email is to be sent now or later:

- When emailing from the family/participant view or sending a cart abandonment report, the UI copy indicates that the email is to be sent now:



- When sending a new email, new reminder email or finance email report, the UI copy indicates that the email can be sent now or at a later date:



Failed Payment Report Terminology Change

The **Failed payment report** has been renamed to **Failed installment payment report**. All occurrences of the phrase “failed payment” have been changed to “failed installment payment” in the following locations:

- The Admin site > **Finance** > **Recently viewed reports** section:

The screenshot shows the 'Financial center' dashboard. The 'Recently viewed reports' sidebar on the right lists several reports, with 'Failed installment payment report' highlighted by a red box. The main content area shows 'Financial performance' with a chart and a summary box indicating 'Last payment from ACTIVE' of \$12.65 for the period May 1-15, 2019.

- The Admin site > **Finance** > **Reports** tab:

The screenshot shows the 'Reports' section of the 'Financial center'. The 'Failed installment payment report' is listed among other reports like 'Customer payments/refunds' and 'Deferred revenue report'. It is highlighted by a red box. The report description states: 'View all failed installment payments within a specified date range.'

- On the report page:

The screenshot shows the 'Failed installment payment report' page. The title 'Failed installment payment report' is highlighted by a red box. The page displays a summary of failed payments, including a total of \$36.67, which is also highlighted by a red box. Below the summary is a table listing individual failed payments.

Customer	Order number	Season	Payment date	Payment method	Reason for failure	Payment amount
Kenji Cheung	C-5B8TJLKX2FL	76ers Overnight Bask...	02/27/2019	Visa	Invalid Account Num...	\$36.67
						\$36.67

- After clicking **Share**, on the **Email this report** popup:

Home

People

Failed installment p

Home > Finance > Reports > Failed installm

Failed installment payment report

Time period: 04/30/2018 to 05/30/2

\$36.67

Total failed installment payments

Send email

<input checked="" type="checkbox"/>	Customer	Order num
<input checked="" type="checkbox"/>	Kenji Cheung	C-5B8TJL

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☐ Brittany Dusek (brittany.dusek@activenetwork.com)

☐ Cong Li (cong.li@activenetwork.com)

☐ Cong Li (lc5022@gmail.com)

☐ elaine z (elaine.zhong@activenetwork.com)

☐ Jesse Pl (jesse.pl@activenetwork.com)

0 selected

Subject

Quick report link for Failed installment payment report

Message

shared a report with you for Sattvic Retreats. Click the link below to view it (you will need to log in). You can also bookmark this link for quick access to run this report in the future.

<https://campsul-vip.qa.aw.dev.activenetwork.com/SattvicRetreats#/finance/failedPaymentReport?startDate=1525046400000&endDate=1559174400000&groupBy=null>

Add your own custom text to this message.

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Send



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ACTIVE Network, LLC
717 North Harwood Street
Suite 2500
Dallas, TX 75201