

A group of diverse young children are holding hands in a circle on a playground. One child in the foreground is wearing a red and white checkered shirt and blue jeans, looking up with a joyful expression. Another child in a light blue shirt is visible behind them. The scene is outdoors with trees and a building in the background.

 *Camp & Class Manager*

# RELEASE NOTES 9.10

Tuesday, August 13, 2019

# Camp and Class Manager Release Notes

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## Camp and Class Manager Release Notes

### Report Concierge

Now, with the new **Report concierge** feature, agency users can schedule up to 100 active automated report deliveries, allowing recipients to receive the following reports on a regular basis, by email, without logging into the Admin site:

#### Financial reports

Location: Admin site > **Home** tab > **Finance** tab > **Reports** tab

- **Accounts receivable** report
- **Credit balance** report
- **Customer payments/refunds** report
- **Failed installment payment** report
- **Financial activity** report
- **Internal discount** report
- **Payment plan** report
- **Transactions** report

#### Season reports

Location: Admin site > **Home** tab > a season > **Reports** link

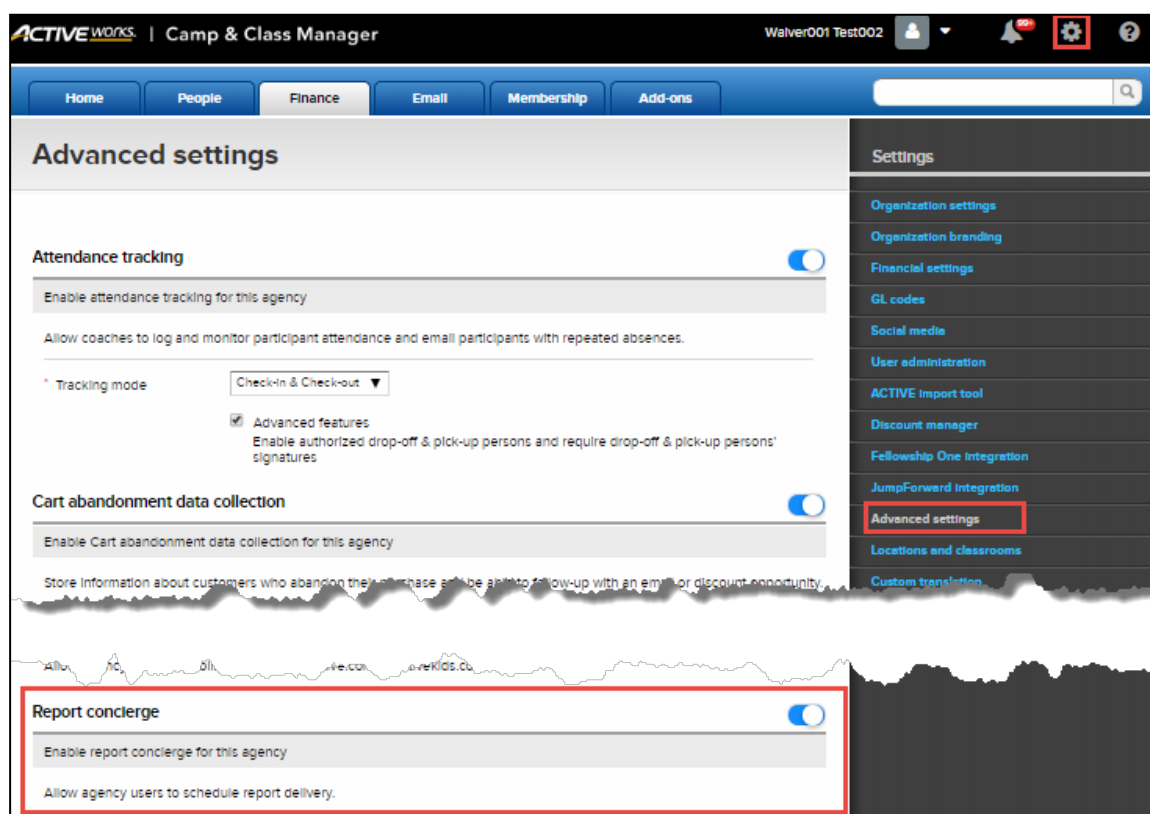
- **Cart abandonment e-mail** report
- **Check-in report** (PDF)
- **Daily Attendance Report**
- **Merchandise purchase** report
- **Participant attendance** report
- **Session capacity** report
- **Waitlist and session registration history** report (PDF)
- **Waitlist** report
- Custom reports

### Enable/disable the Report concierge feature

ACTIVE administrators can enable or disable the **Report concierge** feature at the agency level.

Location: Admin site > **Settings** (wheel icon on top) > **Advanced settings** > **Report concierge** switch (defaults to ON)

# Camp and Class Manager Release Notes



## Schedule automated report delivery

### General workflow

In the Admin site, after the **Report concierge** feature is enabled, a **Schedule** button appears on a supported report page. For example, on the **Accounts receivable** report page:

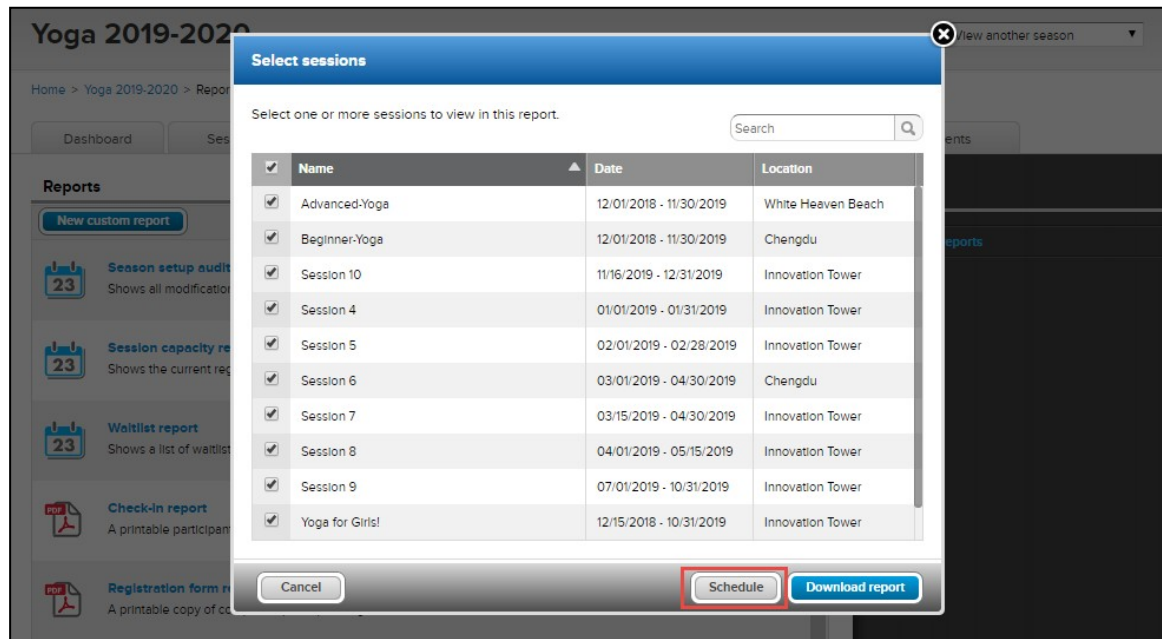
Accounts receivable																															
Home > Finance > Reports > Accounts receivable																															
Accounts receivable																															
For all orders placed <a href="#">Edit</a>																															
Showing 53 of 53																															
<div> <div>\$17,917.85</div> <div>\$16,868.90</div> <div>\$0.00</div> <div>\$0.00</div> <div>\$0.00</div> <div>\$1,048.95</div> </div> <div> <div>Outstanding balances</div> <div>Current</div> <div>1-30 days</div> <div>31-60 days</div> <div>61-90 days</div> <div>91+ days</div> </div>																															
<div> <div>Send email</div> </div> <table> <tr> <th>Customer</th><th>Current</th><th>1-30 days</th><th>31-60 days</th><th>61-90 days</th><th>91+ days</th><th>Past due</th><th>Total due</th></tr> <tr> <td><input type="checkbox"/> <a href="#">Rebecca Strege</a></td><td>\$270.00</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>\$270.00</td></tr> <tr> <td><input type="checkbox"/> <a href="#">Peter Parker</a></td><td>\$810.00</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>\$0.00</td><td>\$810.00</td></tr> </table>								Customer	Current	1-30 days	31-60 days	61-90 days	91+ days	Past due	Total due	<input type="checkbox"/> <a href="#">Rebecca Strege</a>	\$270.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$270.00	<input type="checkbox"/> <a href="#">Peter Parker</a>	\$810.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$810.00
Customer	Current	1-30 days	31-60 days	61-90 days	91+ days	Past due	Total due																								
<input type="checkbox"/> <a href="#">Rebecca Strege</a>	\$270.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$270.00																								
<input type="checkbox"/> <a href="#">Peter Parker</a>	\$810.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$810.00																								

### Exceptions:

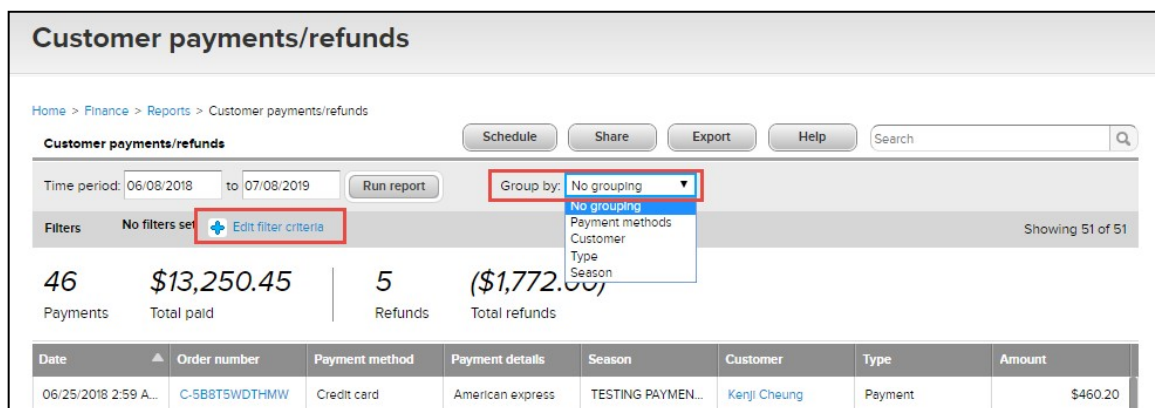
- For the season **Check-in report** and the **Waitlist and session registration history** report, after clicking the report, the **Schedule** button is displayed on the **Select sessions** popup. The rest of the workflow is the same as below.



## Camp and Class Manager Release Notes



- Scheduled reports will inherit any filters or **Group by** configuration that are set up at the time of scheduling (see [Example: schedule a report with additional filters and view-configuration](#) for more information). For example, filters on the **Customer payments/refunds** report page:



By clicking the **Schedule** button, a **Report delivery schedule** popup appears for agency users to enter or select the required schedule information:

- Scheduled report name:** For example, “weekly check-in report” or “monthly financial activity report”.
- Schedule status:** Whether the schedule is activated or paused (note: the 100-limit on scheduled reports only applies to active schedules, not expired or paused schedules).
- Set a date range:** Choose to include data from a relative date range.
- Choose a pattern:** Whether to send the report on a weekly (any selected day or days in a week) or monthly (first day of every calendar month) basis.
- Expiration date:**
  - For financial reports, the maximum schedule expiration date is 365 days after the schedule is saved.
  - For season reports, the default schedule expiration date is 31 days after the season ends. Agency users can also select an expiration date up to a maximum of 365 days after the schedule is saved.
  - A season’s end date is defined by the latest session end date at time of scheduling.
- Send to:** Recipients who will be automatically emailed the report.

## Camp and Class Manager Release Notes

- **Subject:** Email subject for the scheduled report.
- **Message:** Email message. Agency users can enter a custom message which will be appended to the default message.

**Report delivery schedule**

\* Scheduled report name: Scheduled weekly report, for example  
60 characters left

Season: All seasons

Schedule status: Activated

Set a date range: Last 7 days

Choose a pattern: This report will be run at UTC 0:00 on the days/dates selected.

☒ Weekly  
Will send weekly on selected days

M T W Th F Sa Su

☐ Monthly  
Will send monthly on the first day of every calendar month

Expiration date: 07/24/2020

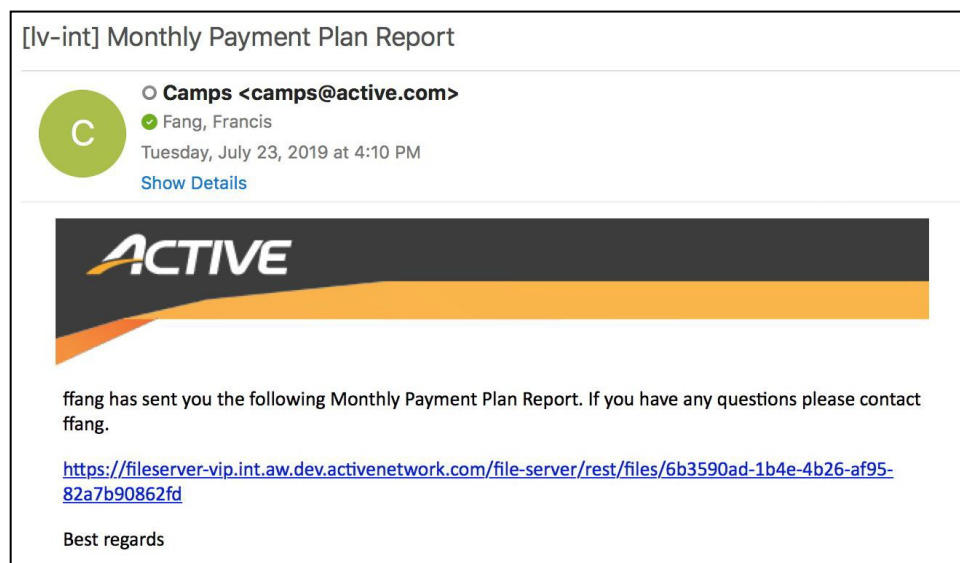
\* Send to:

User
<input type="checkbox"/> Brittany Dusek (brittany.dusek@activenetwork.com)
<input type="checkbox"/> Cong Li (cong.li@activenetwork.com)
<input type="checkbox"/> Cong Li (lc5022@gmail.com)

0 selected

Cancel Save

Once a report is successfully scheduled, the report will be emailed on the scheduled days or dates as a hyperlink to the selected recipients, allowing them to download and view the report without logging into the AUI, for example:



### Example: schedule a financial report

To schedule weekly email delivery of the **Accounts receivable** report on every Friday:

1. Under the Admin site > **Finance** tab > **Reports** tab, click **Accounts receivable**.

## Camp and Class Manager Release Notes

- On the report page, click **Schedule**.

**Accounts receivable**

Home > Finance > Reports > Accounts receivable

Accounts receivable Schedule Share Export Help

For all orders placed [Edit](#) Showing 53 of 53

<b>\$17,917.85</b>	<b>\$16,868.90</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,048.95</b>
Outstanding balances	Current	1-30 days	31-60 days	61-90 days	91+ days

[Send email](#)

<input type="checkbox"/>	Customer	Current	1-30 days	31-60 days	61-90 days	91+ days	Past due	Total due
<input type="checkbox"/>	Rebecca Stregge	\$270.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$270.00
<input type="checkbox"/>	Peter Parker	\$810.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$810.00
<input type="checkbox"/>	Patricia Wittenberg	\$165.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$165.00
<input type="checkbox"/>	Patricia Pritchard	\$270.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$270.00

- On the **Report delivery schedule** popup, complete the required schedule information (in this example, the report is scheduled for delivery every Friday, so in the **Choose a pattern** field, select **Weekly > F**).

**Accounts receivable**

Home > Finance > Reports > Accounts receivable

Accounts receivable Schedule Share Export Help

For all orders placed [Edit](#) Showing 53 of 53

**\$17,917.85** **\$16,868.90**

Outstanding balances Current

[Send email](#)

**Report delivery schedule**

\* Scheduled report name  34 characters left

Schedule status

Choose a pattern This report will be run at UTC 0:00 on the days/dates selected.

☒ Weekly Will send weekly on selected days

☐ Monthly Will send monthly on the first day of every calendar month

Expiration date

\* Send to

<input type="checkbox"/>	User
<input checked="" type="checkbox"/>	Kathy White (kay.jiang@activenetwork.com)
<input checked="" type="checkbox"/>	Lisa Wang (lisa.wang@activenetwork.com)
<input checked="" type="checkbox"/>	Noah Standard (noahskocilich+1120b@gmail.com)
<input checked="" type="checkbox"/>	Robin Smith (satva@ahimse.org)

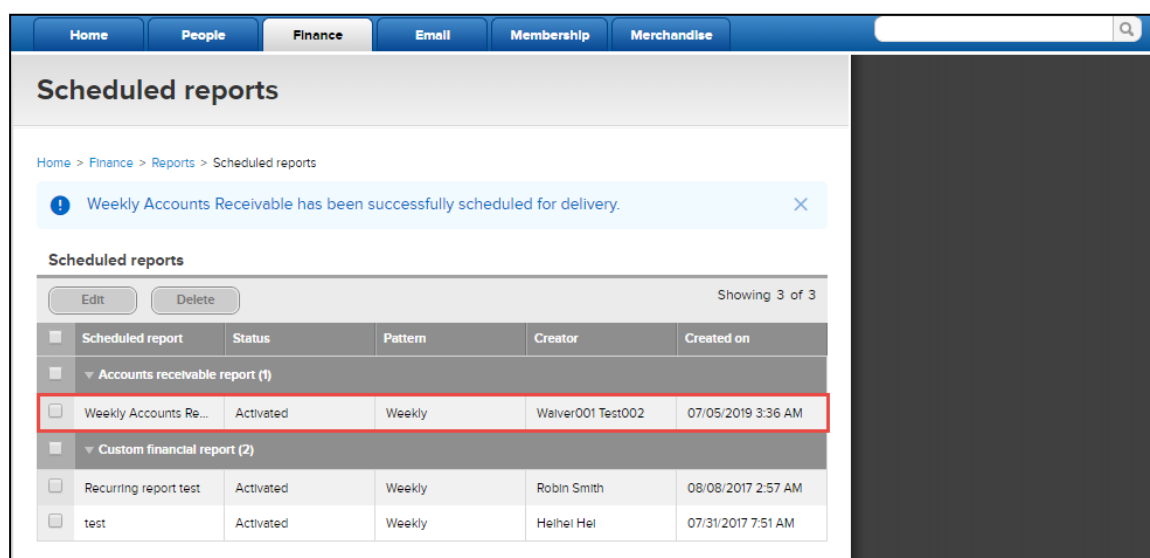
5 selected

\* Subject

[Cancel](#) [Save](#)

- Click **Save**. The scheduled report is then listed on the **Scheduled reports** page (see [Manage scheduled financial reports](#) for more information).

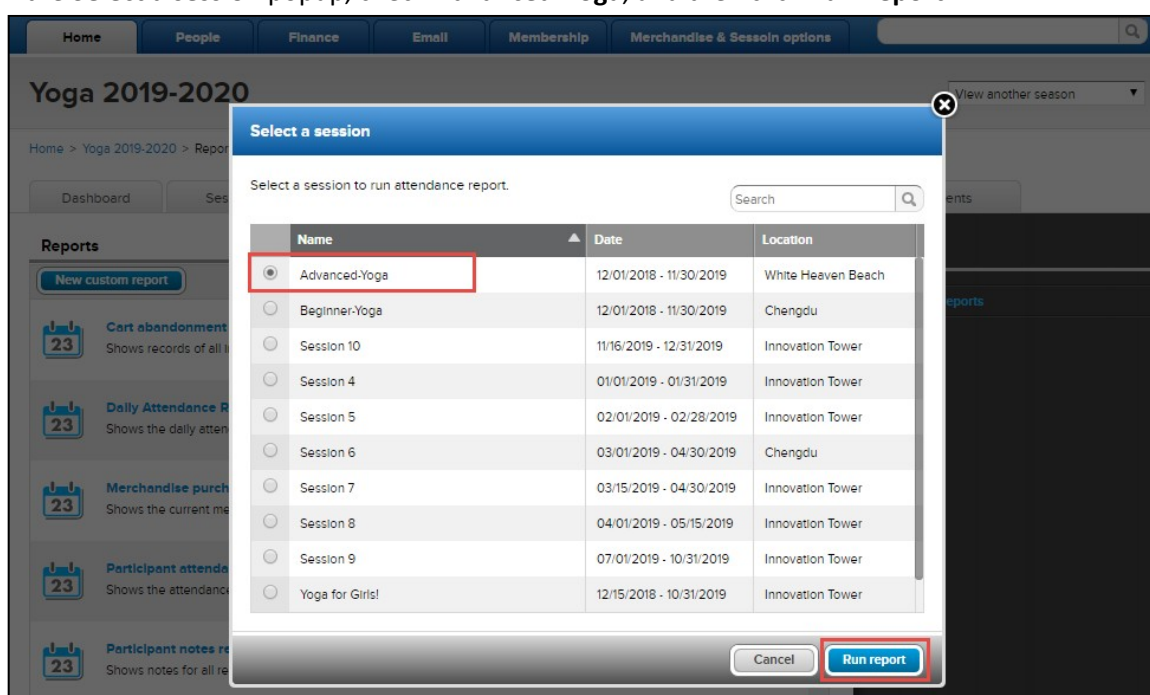
## Camp and Class Manager Release Notes



### Example: schedule a season report

To schedule monthly email delivery of the **Participant attendance report** for the Yoga 2019-2020 season, Advanced-Yoga session:

1. Under the Admin site > **Home** tab > **Yoga 2019-2020** season, click **Reports** > **Participant attendance report**.
2. On the **Select a session** popup, check **Advanced-Yoga**, and then click **Run Report**.



3. On the **Yoga 2019-2020 Participant attendance report** page, click **Schedule**.



## Camp and Class Manager Release Notes

**Yoga 2019-2020** View another season

Home > Yoga 2019-2020

Dashboard Sessions Coupons **Reports** Supplemental forms Group assignments

**Participant attendance report** Schedule Export report Share Customize Search

Session: Advanced-Yoga Showing 6 of 6

Date range: From MM/DD/YYYY to MM/DD/YYYY Update

Email selected people

	Name	Gender	Date of birth	Grade	Registratio...	06/29	06/30	07/06	07/07	07/13	07/14
<input type="checkbox"/>	Simpson, Mark	Male		Adult (18-)	Active						
<input type="checkbox"/>	Smith, Jenny	Female		10th	Active						
<input type="checkbox"/>	Wells, Mary	Female		Adult (18-)	Active						
<input type="checkbox"/>	White, Tracy	Female	08/01/1991		Active						
<input type="checkbox"/>	Wittenberg, June		12/18/2010		Active						
<input type="checkbox"/>	Zhang, Lulu	Female	02/12/2000	11th	Active						

- On the **Report delivery schedule** popup, complete the required schedule information (in this example, the report is scheduled for monthly delivery, so in the **Choose a pattern** field, select **Monthly**).

**Report delivery schedule**

\* Scheduled report name monthly advanced-yoga session attendance report  
13 characters left

Session Advanced-Yoga

Schedule status Activated

Set a date range Most recent full month

Choose a pattern This report will be run at UTC 0:00 on the days/dates selected.

☐ Weekly  
Will send weekly on selected days

☒ **Monthly**  
Will send monthly on the first day of every calendar month

Expiration date ☒ **31 days after the season ends**  
☐ Select an expiration date

\* Send to

	User
<input checked="" type="checkbox"/>	Kathy White (kay.jiang@activenetwork.com)
<input checked="" type="checkbox"/>	Lisa Wang (lisa.wang@activenetwork.com)
<input checked="" type="checkbox"/>	Noah Standard (noahskocilich+1120b@gmail.com)

3 selected

Cancel Save

POWERED BY **ACTIVE**

- Click **Save**. The scheduled season report is then listed on the season's **Delivery schedule** page (see [Manage scheduled season reports](#) for more information).

## Camp and Class Manager Release Notes

**Yoga 2019-2020** View another season

Home > Yoga 2019-2020 > Reports > Delivery schedule

monthly advanced-yoga session attendance report has been successfully scheduled for delivery.

Dashboard Sessions Coupons **Reports** Supplemental forms Group assignments

**Delivery schedule**

Edit Delete Showing 3 of 3

Scheduled report	Status	Pattern	Creator	Created on
▼ Cart abandonment e-mail report (1)				
<input type="checkbox"/> Scheduled weekly ca...	Activated	Weekly	Waiver001 Test002	07/22/2019 8:58 AM
▼ Check-in report (1)				
<input type="checkbox"/> Yoga all sessions mo...	Activated	Monthly	Waiver001 Test002	07/22/2019 9:09 AM
▼ Participant attendance report (1)				
<input type="checkbox"/> monthly advanced-y...	Activated	Monthly	Waiver001 Test002	07/25/2019 6:59 AM

### Example: schedule a report with additional filters and view-configuration

Scheduled reports will inherit any filters or **Group by** configuration that are set up at the time of scheduling. The selected criteria are displayed on the **Report delivery schedule** popup.

For example, to schedule monthly email delivery of the **Customer payments/refunds** report with additional settings:

1. Under the Admin site > **Finance** tab > **Reports** tab, click **Customer payments/refunds**.
2. The **Customer payments/refunds** report has additional **Season**, **Payment types** and **Refund types** filters and **Group by** view-configuration. Click the **+ Edit filter criteria** link or the **Group by** dropdown list, and then select the required configuration.

**Customer payments/refunds**

Home > Finance > Reports > Customer payments/refunds

Schedule Share Export Help Search

Customer payments/refunds

Time period: 06/08/2018 to 07/08/2019 Run report Group by: No grouping

Filters No filters set Edit filter criteria

Showing 51 of 51

46 Payments \$13,250.45 Total paid 5 Refunds (\$1,772.00) Total refunds

Date	Order number	Payment method	Payment details	Season	Customer	Type	Amount
06/25/2018 2:59 A...	C-5B8T5WDTHMW	Credit card	American express	TESTING PAYMEN...	Kenji Cheung	Payment	\$460.20
06/25/2018 7:55 AM	C-5B8TJ9F0G29	eCheck	Successful	76ers Overnight B...	Kenji Cheung	Payment	\$125.95
06/26/2018 10:13 ...	C-5B8TJ9SF7SK	Credit card	Visa	76ers Overnight B...	Kenji Cheung	Payment	\$125.95
06/28/2018 8:54 A...	C-5B8TJBB2WXX	Cash		Yoga 2018-2019	Jane Smith	Payment	\$26.00

## Camp and Class Manager Release Notes

Time period: 06/08/2018 to 07/08/2019

Filters No filters set Edit filter criteria

46 Payments \$13,250.45 Total paid

Date	Order number	Payment method	Payment details	Season	Customer	Type	Amount
06/25/2018 2:59 A...	C-5B8T5WDTHMW	Credit card				Payment	\$460.20
06/25/2018 7:55 AM	C-5B8TJ9F0G29	Credit card				Payment	\$125.95
06/26/2018 10:13 ...	C-5B8TJ9SF75K	Credit card				Payment	\$125.95

Showing 51 of 51

### Customer payments/refunds

Home > Finance > Reports > Customer payments/refunds

Customer payments/refunds Schedule Share Export Help Search

Time period: 06/08/2018 to 07/08/2019 Run report Group by: Customer

Filters Payment types: All payment... Refund types: Credit card Edit filter criteria Showing 49 of 49

46 Payments \$13,250.45 Total paid 3 Refunds (\$860.00) Total refunds

Date	Order number	Payment method	Payment details	Season	Customer	Type	Amount
▼ Andy Chen (1)							\$576.70
02/21/2019 9:29 AM	C-5B8TLT8F1YL	Credit card	Master card	Yoga 2018-2019	Andy Chen	Payment	\$576.70
▼ Anna Skocilich (1)							\$486.00
09/11/2018 9:20 AM	C-5B8TK5CDB8L	Cash		Yoga 2018-2019	Anna Skocilich	Payment	\$486.00
▼ Brad Pitt (1)							\$540.00
12/05/2018 4:42 PM	C-5B8TKZ4FCYX	Cash		Membership	Brad Pitt	Payment	\$540.00
▼ Brian Anderson (3)							\$1,251.00
12/21/2018 6:47 AM	C-5B8TL3RYXD6	Credit card	Visa	Yoga 2018-2019	Brian Anderson	Payment	\$461.00

- Click **Schedule**.
- On the **Report delivery schedule** popup, complete the required schedule information (in this example, the report is scheduled for monthly delivery, so in the **Choose a pattern** field, select **Monthly**).  
**Note:** The additional filter criteria set in Step 2 are displayed on the popup.

## Camp and Class Manager Release Notes

**Customer payments/refunds**

Home > Finance > Reports > Customer payments/refunds

Time period: 06/08/2018 to 07/08/2018

Filters: Payment types: All payment types

46 Payments    \$13,250.40 Total paid

**Report delivery schedule**

Scheduled report name: Monthly payments/refunds report (29 characters left)

Group by: Customer

Payment types: All payment types

Refund types: Credit cards

Season: All seasons

Schedule status: Activated

Set a date range: Most recent full month

Choose a pattern: This report will be run at UTC 0:00 on the days/dates selected.

☐ Weekly  
Will send weekly on selected days

☒ Monthly  
Will send monthly on the first day of every calendar month

Expiration date: ☒ Never expire  
☐ Select an expiration date

Send to: User

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

Cancel Save

- Click **Save**. The scheduled report is then listed on the **Scheduled reports** page (see [Manage scheduled reports](#) for more information).

**Scheduled reports**

Home > Finance > Reports > Scheduled reports

Monthly payments/refunds report has been successfully scheduled for delivery.

**Scheduled reports**

Edit Delete Showing 4 of 4

Scheduled report	Status	Pattern	Creator	Created on
▼ Accounts receivable report (1)				
Weekly Accounts Re...	Activated	Weekly	Waiver001 Test002	07/05/2019 3:36 AM
▼ Customer payments/refunds report (1)				
Monthly payments/re...	Activated	Monthly	Waiver001 Test002	07/08/2019 8:58 AM

### Manage scheduled reports

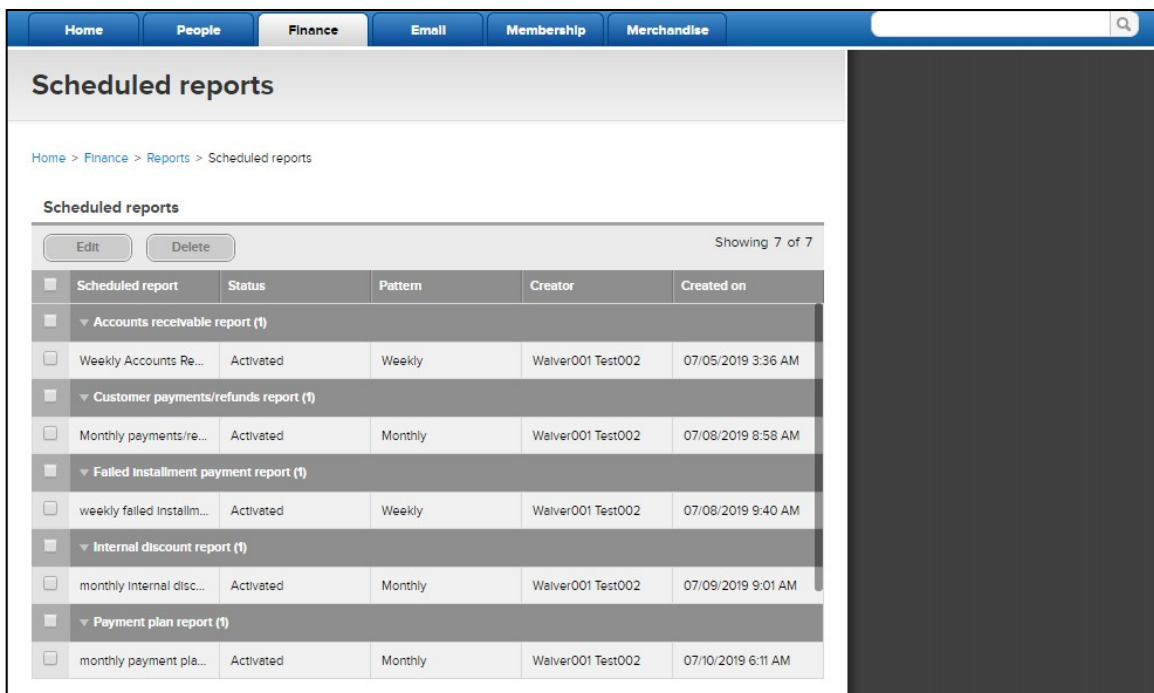
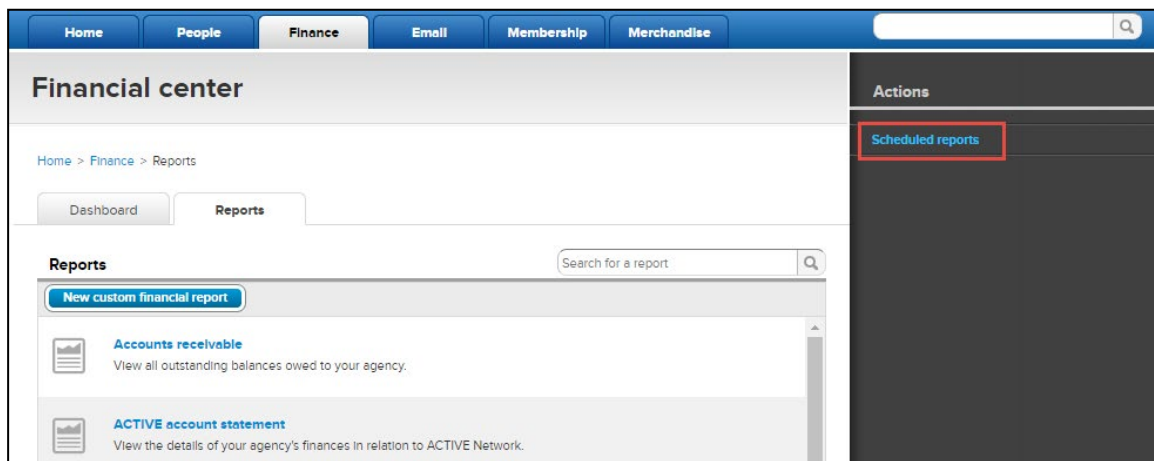
Administrators and report owners (agency users who scheduled the reports) can view schedule details, and edit or delete the scheduled reports:

#### Manage scheduled financial reports

Location: Admin site > **Finance** tab > **Reports** tab > **Actions** > **Scheduled reports** link



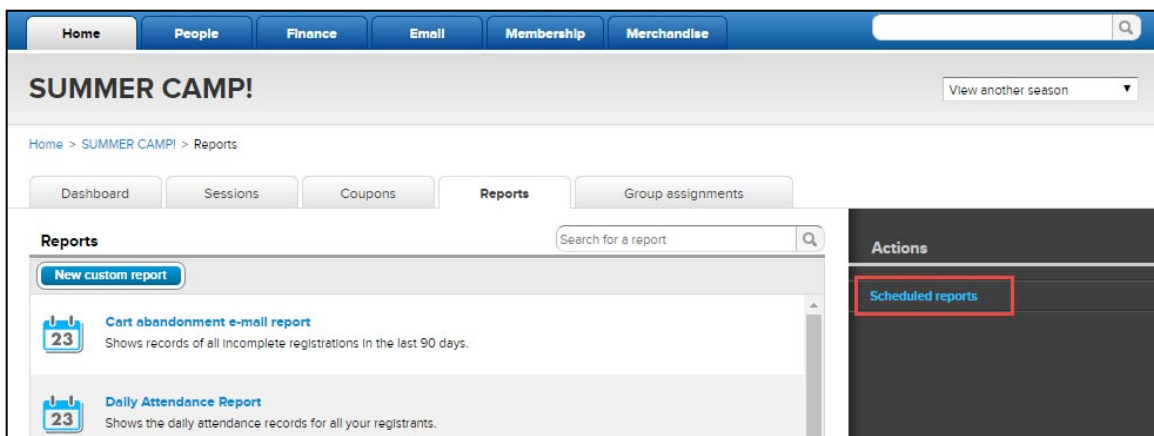
## Camp and Class Manager Release Notes



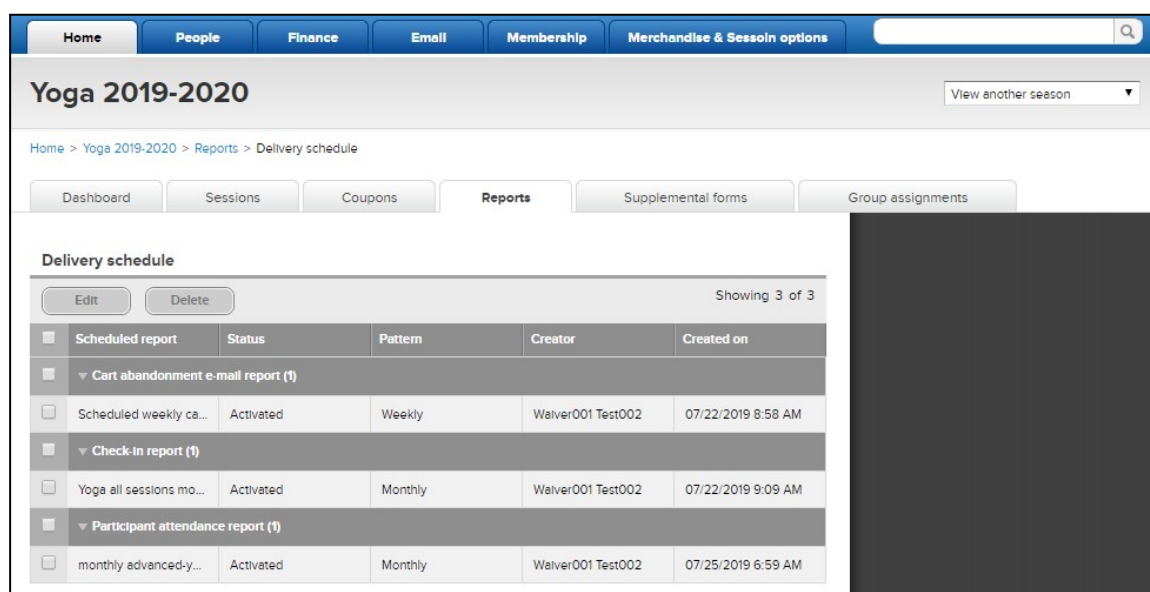
- To edit a scheduled financial report, select the required schedule and then click **Edit**.
- To delete one or more delivery schedules, select the unwanted schedules and then click **Delete**.

### Manage scheduled season reports

Location: Admin site > **Home** tab > a season > **Reports** link > **Actions** > **Scheduled reports** link



## Camp and Class Manager Release Notes



- To edit a scheduled season report, select the schedule and then click **Edit**.
- To delete one or more delivery schedules, select the unwanted schedules and then click **Delete**.

### Manage scheduled custom financial reports

The workflow and popup screen for scheduling a custom financial report is the same as before. After a custom financial report is scheduled, administrators and report owners can edit or delete the schedule from either the:

- Admin site > **Finance** tab > **Reports** tab > **Actions** > **Scheduled reports** link
- Admin site > **Finance** tab > **Reports** tab > required report

**Note:** Deleting a custom financial report on the **Scheduled reports** page only deletes the delivery schedule, NOT the actual report.

## CCM Conversion Improvement

### Promotion tag visibility switch

Now, in the Admin site, agency users can turn on or off the **Promotion tag visibility** feature to control the display of discount or payment-plan tags shown on the CUI.

Season-level switch location:

Admin site > **Home** tab > a season > **Setup** link > **Settings** > **Season** link > **Promotion tag visibility** toggle switch

## Camp and Class Manager Release Notes

The screenshot displays the 'Step 1: Season' configuration page in the Camp and Class Manager interface. At the top, a navigation bar includes tabs for Home, People, Finance, Email, Membership, and Merchandise & Session options. The main content area is titled 'Step 1: Season' and instructs the user to 'Let's get started! First, name your season.' Below this, there is a 'Season name' input field containing 'Yoga 2019-2020' and a 'Categories' section with tags for 'Yoga' and 'Fitness and well-being'. A 'Promotion tag visibility' toggle switch is shown in the 'ON' position. On the right side, a sidebar contains a 'Status: Active' indicator, a 'See a preview' button, and a 'Settings' menu where 'Season' is the selected option. The bottom of the page features a contact information section for Kate Willson and a link to 'Enable program settings for this season'.

If the season-level switch is OFF, then no promotion tags or information popups are displayed on the CUI session selection page for that season.

If the season-level switch is ON, then on the session-level setup, a **Promotion tags** section appears: Admin site > **Home** tab > a season > **Setup** link > **Settings** > **Session** link > **Promotion tags** section.

## Camp and Class Manager Release Notes

### Step 2: Sessions

Set up your session

Provide the details for your session, including location and tuition options.

#### Basic settings

Define the basics of your session, including dates, location and for what participants may register.

\* Session name

Payment plans This session is associated with the payment plans:  
[3 installments](#)

\* Dates  to

\* Overnight? ☐ Overnight ☒ Day ☐ Evening

Session location

Display remaining capacity ☒ Allow urgency driving tool to encourage registrations. This will not apply to sessions or tuitions which have unlimited capacity.

When capacity is  % full, display 'Only X spots left!'

Promotion tags

☒ Display discount tag

☒ Display payment plan tag

Waitlists ☒ Allow waitlist registrations when capacities are reached [?](#)

[Customize waitlist policy](#)

Membership restrictions ☐ No restriction ☒ Requires membership to register/purchase ☐ Hidden from non-members

Status: Active

[See a preview](#)

#### Settings

- Season
- Sessions
- Session groups
- Deposits and payment plans
- Discounts
- Look and feel
- Registration forms
- Confirmation email
- Activation

### Note:

The session-level checkbox options reflect the selection on the season level. For example, if the season-level switch is on and the **Display discount tag only** radio button is selected, then on the session level, only the **Display discount tag** checkbox is displayed.

## Performance Enhancements

The time required to download the Active Account Statement report with one month's data has been reduced.



## Camp and Class Manager Release Notes