

RELEASE NOTES 9.4

Tuesday, April 9th, 2019



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CCM CONVERSION IMPROVEMENTS

To facilitate customers' purchase decisions during normal and session group workflows and to increase conversion rates, the following improvements have been applied to both the Admin Site and Online Registration Site:

Admin:

To drive booking urgency, now during season setup, for sessions with limited capacity, authorized agency users can enable the new **Display remaining capacity** switch to set a threshold (0 to 99%) at which the number of remaining spots is displayed in the CUI to encourage consumers to purchase.

Enabling these settings at the season level helps agency users to avoid entering the settings again at the session level. Agency users can also disable these settings if they do not want to show the capacity drivers in the CUI.

Location: Admin Site > **Home** tab > a season > **Setup** link > **Season**

The screenshot shows the 'Step 1: Season' setup page in the Admin Site. The page has a blue navigation bar with tabs for Home, People, Finance, Email, Membership, and Merchandise. The main content area is titled 'Step 1: Season' and includes a 'Status: Active' indicator and a 'See a preview' button. The 'Settings' sidebar on the right lists various options, with 'Season' highlighted in red. The main form includes fields for 'Season name' (Yoga 2018-2019), 'Categories' (Yoga, Fitness and well-being), 'Contact' (Kate Willson), and 'Attendance tracking' (enabled). A red box highlights the 'Display remaining capacity' section, which includes a toggle switch (enabled), a description, and a field for 'When capacity is 90 % full, display 'Only X spots left!'.

If the season-level **Display remaining capacity** switch is on, then agency users can also set up each individual session capacity threshold to override the season-level threshold. It is useful for seasons comprised of multiple sessions with different capacities.

Location: Admin Site > **Home** tab > a season > **Setup** link > **Sessions** > a session > **Display remaining capacity**

Home People Finance Email Membership Merchandise

Step 2: Sessions

Status: Active
See a preview

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: Beginner-Yoga

Payment plans: This session is associated with the payment plans: 1 installment

* Dates: 12/01/2018 to 11/30/2019

* Overnight? Overnight

Session capacity: 15

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 80 % full, display "Only X spots left!"

Waitlists Allow waitlist registrations when capacities are reached ?
Customize waitlist policy

Settings

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

Frequently asked questions

Online Registration Site:

Now, on the online registration site > **Session Selection** page:

- If the Admin site capacity switch is on and the capacity threshold is configured, then in the online registration page, when a session registration reaches the threshold (%), an **"Only X spots left!"** message is displayed. The following rules apply when displaying the message:
 - If only the session capacity is set, then the message is displayed at the session level and "X" is the remaining number of session-level spots.

Desktop

Mobile

Session Selection

SELECT ONE OR MORE SESSIONS BELOW. YOU CAN REGISTER MULTIPLE PEOPLE AT THE SAME TIME.

FILTER BY

SESSION LIST

LOCATION

All locations

Advanced-Yoga
View more details

12/01/2018 - 11/30/2019 SU, SA, 3:00 PM - 4:30 PM
White Heaven Beach
Ages 10-20 | Male | Grades Pre-K to 10th

Adult tuition **WAITLIST ONLY** \$550.00

ADD TO CART

DATES

Starts after MM/DD/YYYY
Ends before MM/DD/YYYY

INSTRUCTORS

Search

Beginner-Yoga
View more details

12/01/2018 - 11/30/2019 SU, SA, 9:30 AM - 11:00 AM
Chengdu

Discount tuition (age <25 or >55) \$450.00
Adult tuition (age 25-55) \$500.00

Only 4 spots left!

AGE

10 15
11 16
12 17

YOUR SHOPPING CART

You have no sessions selected. Get started by adding a session on the left.

CONTINUE

HAVE QUESTIONS?

Agency primary contact
1-800-123-1234
public@public.com

Yoga 2018-2019 contact
Kate Willson

Session Selection

ACTIVE | Sattvic Retreats

Filter | Your cart

Advanced-Yoga

View more details

12/01/2018 - 11/30/2019 SU, SA, 3:00 PM - 4:30 PM
White Heaven Beach
Ages 10-20 | Male | Grades Pre-K to 10th

Adult tuition **WAITLIST ONLY** \$550.00

ADD TO CART

Beginner-Yoga

View more details

12/01/2018 - 11/30/2019 SU, SA, 9:30 AM - 11:00 AM
Chengdu

Discount tuition (age <25 or >55) \$450.00

Only 4 spots left!

- If only the tuition capacity is set, then the message is displayed at the individual tuition level and "X" is the remaining number of spots for that tuition:

Session Selection

SELECT ONE OR MORE SESSIONS BELOW. YOU CAN REGISTER MULTIPLE PEOPLE AT THE SAME TIME.

FILTER BY

SESSION LIST

LOCATION

All locations

Advanced-Yoga
View more details

12/01/2018 - 11/30/2019 SU, SA, 3:00 PM - 4:30 PM
White Heaven Beach
Payment plan available Discount available

Adult tuition \$550.00

ADD TO CART

DATES

Starts after MM/DD/YYYY
Ends before MM/DD/YYYY

INSTRUCTORS

Search

Beginner-Yoga
View more details

12/01/2018 - 11/30/2019 SU, SA, 9:30 AM - 11:00 AM
Chengdu
Payment plan available Discount available

Discount tuition (age <25 or >55) \$450.00
Adult tuition (age 25-55) \$500.00

Only 2 spots left!

GENDER

Male only
Female only
Co-ed

YOUR SHOPPING CART

You have no sessions selected. Get started by adding a session on the left.

CONTINUE

HAVE QUESTIONS?

Agency primary contact
1-800-123-1234
public@public.com

Yoga 2018-2019 contact
Kate Willson
1234567890
two@one.com

Session Selection

ACTIVE | Sattvic Retreats

Filter | Your cart

Advanced-Yoga

View more details

12/01/2018 - 11/30/2019 SU, SA, 3:00 PM - 4:30 PM
White Heaven Beach
Payment plan available Discount available

Adult tuition \$550.00

ADD TO CART

Beginner-Yoga

View more details

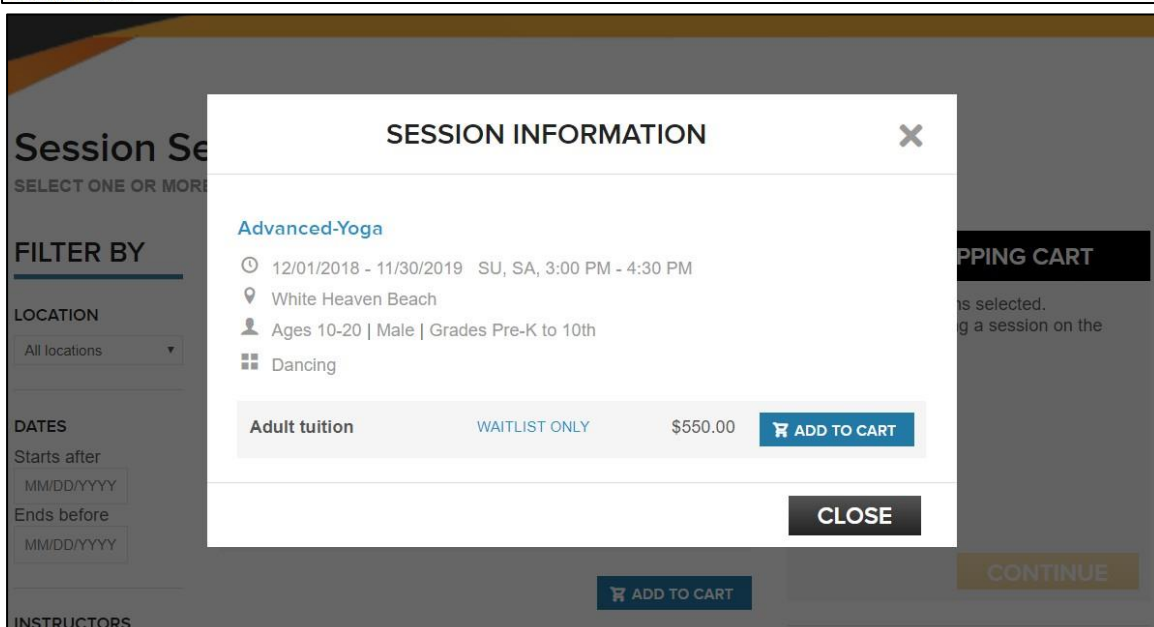
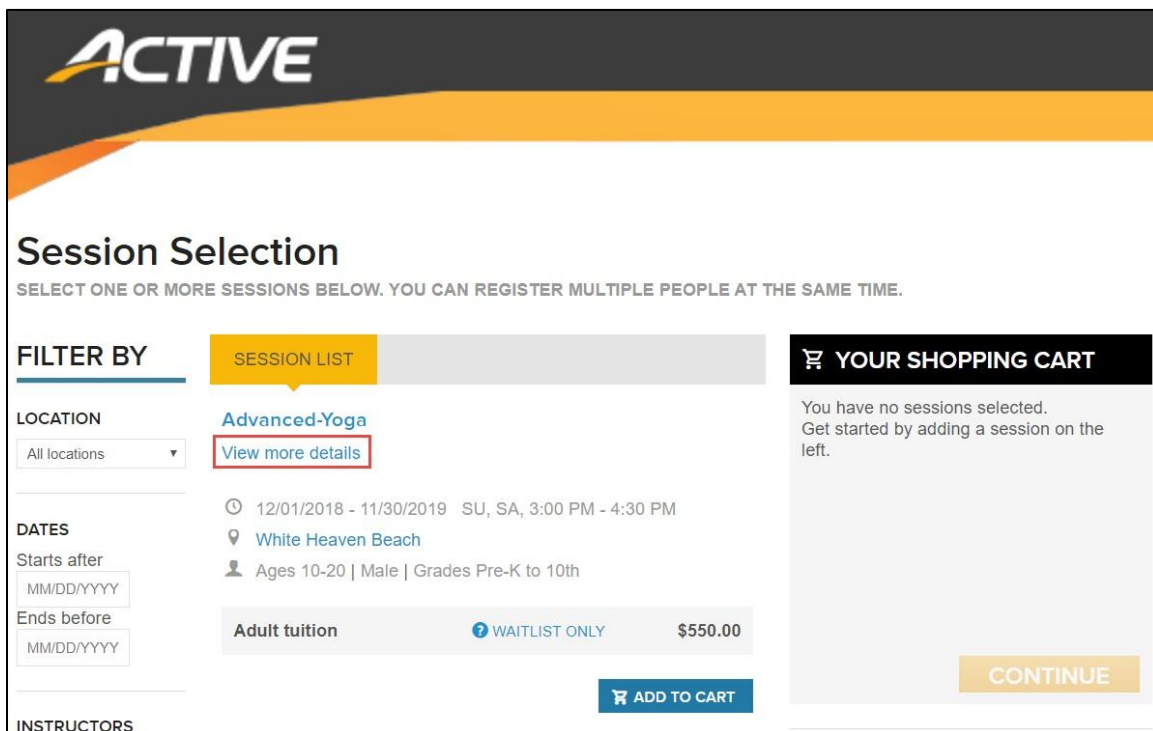
12/01/2018 - 11/30/2019 SU, SA, 9:30 AM - 11:00 AM
Chengdu
Payment plan available Discount available

Discount tuition (age <25 or >55) \$450.00
Adult tuition (age 25-55) \$500.00

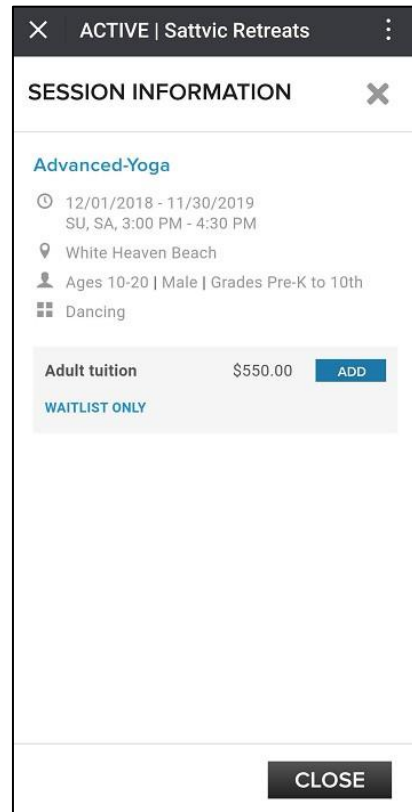
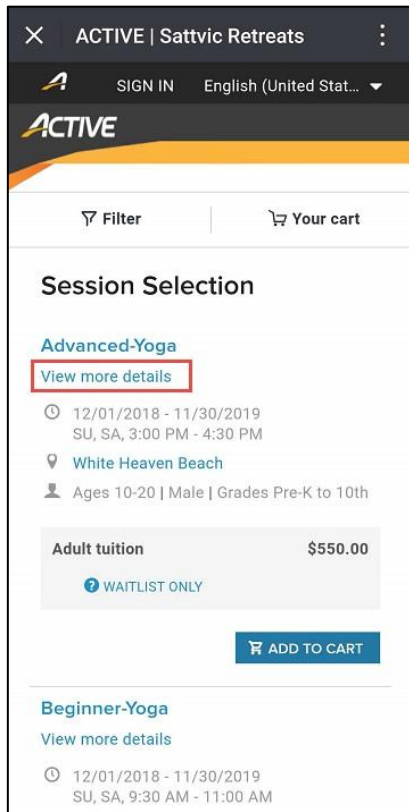
Only 2 spots left!

- If both the session and tuition capacities are set, then the message is displayed at the session level:
 - ✓ If only some tuition capacities are set, then “X” is the remaining number of session-level spots.
 - ✓ If all tuition capacities are set and the session-level capacity \leq sum of the tuition-level capacities, then “X” is the remaining number of session-level spots.
 - ✓ If all tuition capacities are set and the session-level capacity $>$ sum of the tuition-level capacities, then “X” is the sum of all remaining tuition-level spots.
- To improve the visibility of session titles as clickable links, a new **View more details** link has been added under each session title. Clicking either the session title or this link opens a **SESSION INFORMATION** popup with detailed session information:

Desktop

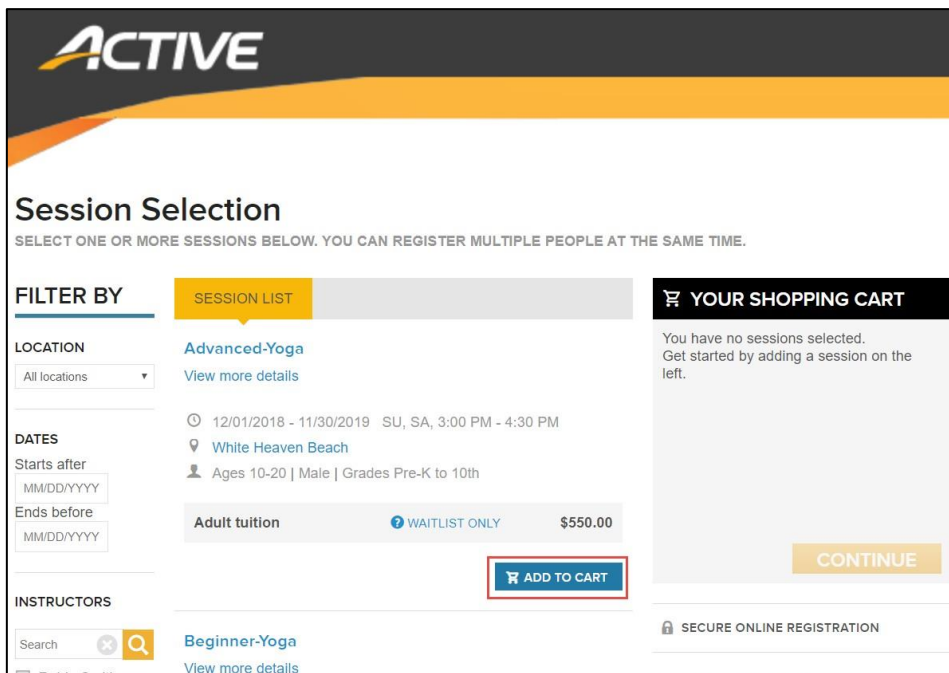


Mobile

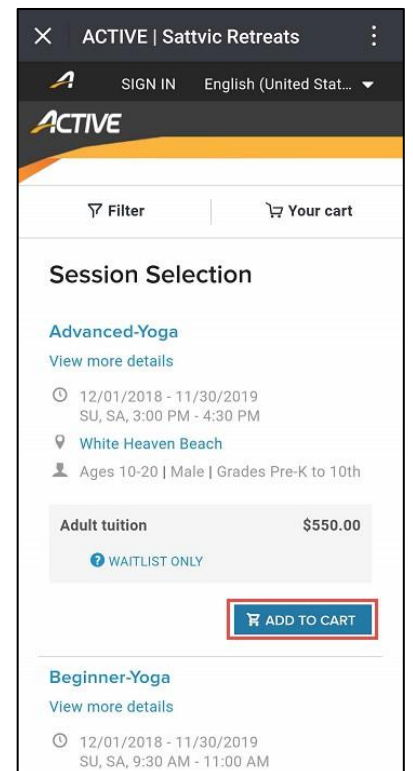


- The ADD button text has been replaced by “ADD TO CART”:

Desktop



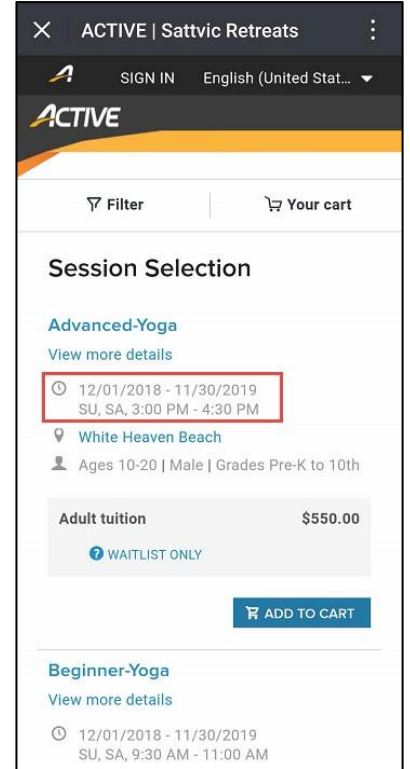
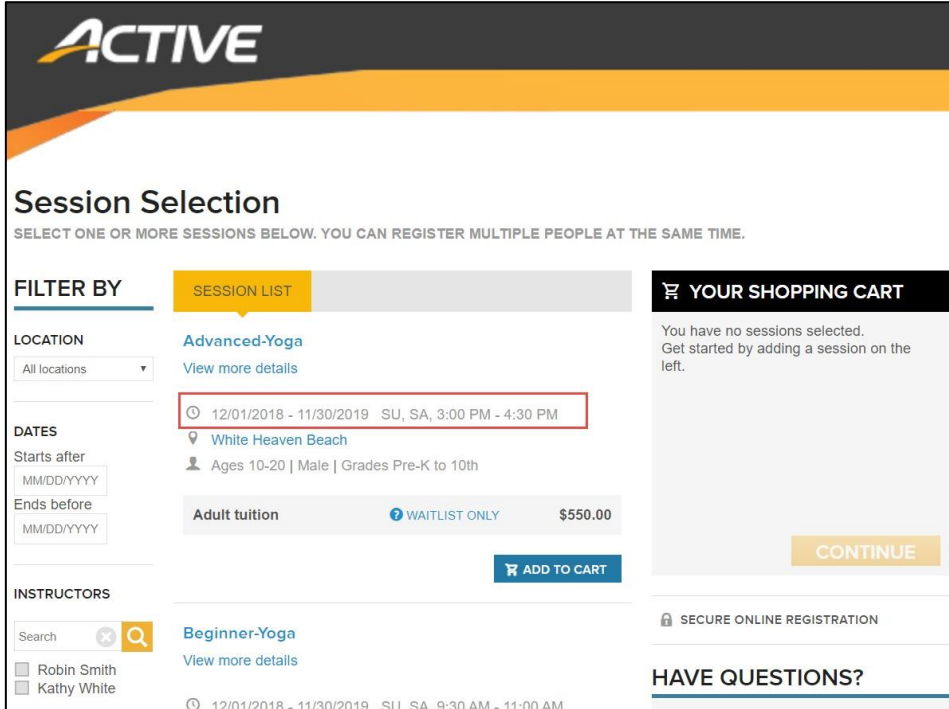
Mobile



- Display of session dates is now aligned with the session group header:

Desktop

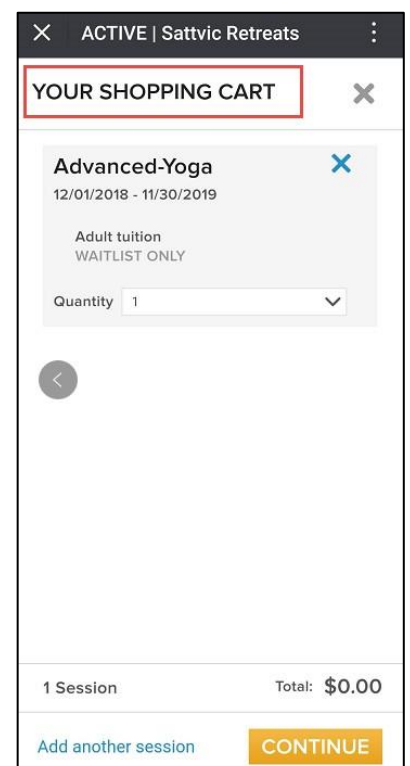
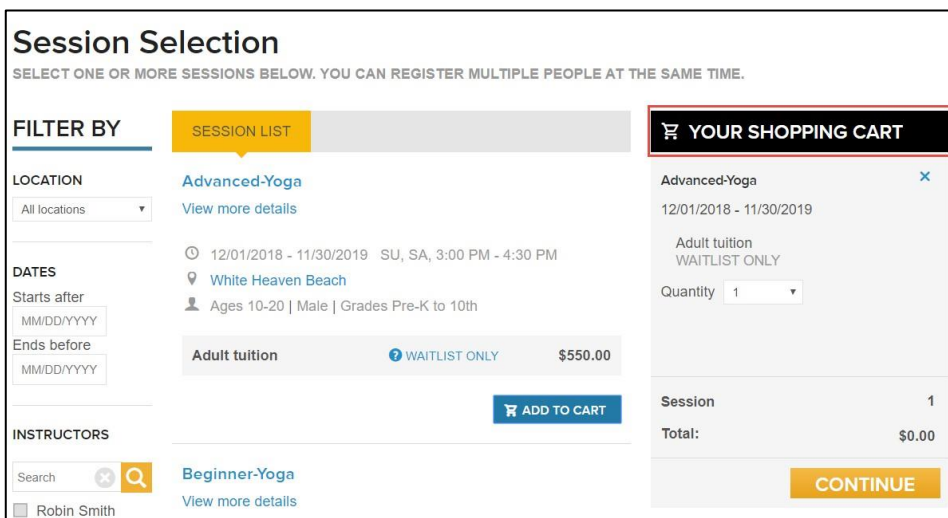
Mobile



- The cart header has been changed from “YOUR SELECTIONS” to “YOUR SHOPPING CART”:

Desktop

Mobil

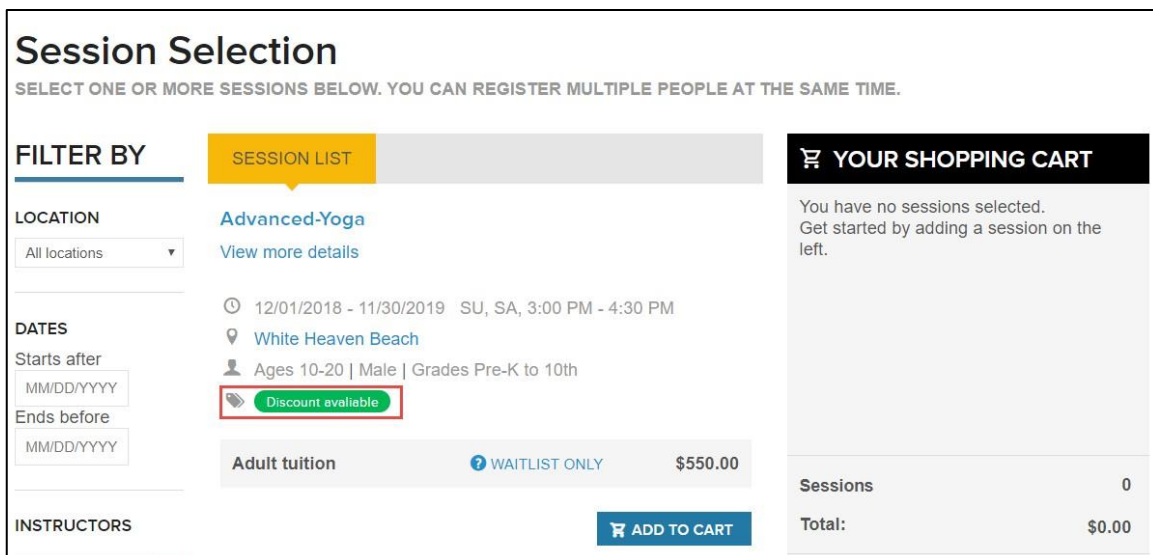


- If a session has applicable discounts (as configured in the AUI), then a “**Discount available**” tag is displayed.

Clicking this tag opens the **SESSION INFORMATION** popup with detailed discount information. The following rules apply when displaying the discount messages:

- For multi-person discount, display message: “**X% off when you register Y people**”.
- For multi-session discount, display message: “**X% off when you register Y for the same person**”.
- For membership discount, display message: “**X\$ off with membership**” (note: the currency symbol matches the tuition currency).
- Membership discount is only displayed if it is configured in the AUI as “Requires membership to register/purchase” or “Hidden from non-members”.
- For session groups, applicable discounts are only displayed at the individual session level after clicking the **VIEW SESSIONS** dropdown list.
- If multiple discounts are available for a session, then the messages are displayed in the following order:
 - ✓ Multi-person discount
 - ✓ Multi-session discount
 - ✓ Membership discount

Desktop



Desktop

The desktop screenshot shows a modal window titled "SESSION INFORMATION" for an "Advanced-Yoga" session. The session details include the dates "12/01/2018 - 11/30/2019" on "SU, SA" from "3:00 PM - 4:30 PM" at "White Heaven Beach". The session is for "Ages 10-20 | Male | Grades Pre-K to 10th" and includes "Dancing". A green callout box highlights the text "10% off when you register 2 people". The pricing section shows "Adult tuition" at "\$550.00" with a "WAITLIST ONLY" status and an "ADD TO CART" button. A "CLOSE" button is located at the bottom right of the modal.

Mobile

The mobile screenshot shows the "Session Selection" screen for "Advanced-Yoga". The session details are displayed in a card format, including the dates "12/01/2018 - 11/30/2019" on "SU, SA" from "3:00 PM - 4:30 PM" at "White Heaven Beach". The session is for "Ages 10-20 | Male | Grades Pre-K to 10th". A green callout box highlights the text "Discount available". The pricing section shows "Adult tuition" at "\$550.00" with a "WAITLIST ONLY" status and an "ADD TO CART" button. A "Beginner-Yoga" session is also visible below.

The mobile screenshot shows a modal window titled "SESSION INFORMATION" for an "Advanced-Yoga" session. The session details include the dates "12/01/2018 - 11/30/2019" on "SU, SA" from "3:00 PM - 4:30 PM" at "White Heaven Beach". The session is for "Ages 10-20 | Male | Grades Pre-K to 10th" and includes "Dancing". A green callout box highlights the text "10% off when you register 2 people". The pricing section shows "Adult tuition" at "\$550.00" with a "WAITLIST ONLY" status and an "ADD" button. A "CLOSE" button is located at the bottom right of the modal.

- If a session has payment plans available (as configured in the AUI), then a “**Payment plan available**” tag (unclickable) is displayed to remind consumers that this session allows payment by installments.

Desktop

Session Selection
SELECT ONE OR MORE SESSIONS BELOW. YOU CAN REGISTER MULTIPLE PEOPLE AT THE SAME TIME.

FILTER BY | **SESSION LIST** | **YOUR SHOPPING CART**

LOCATION
All Locations | **Advanced-Yoga** | [View more details](#)

DATES
Starts after: MM/DD/YYYY
Ends before: MM/DD/YYYY

12/01/2018 - 11/30/2019 SU, SA, 3:00 PM - 4:30 PM
White Heaven Beach
Ages 10-20 | Male | Grades Pre-K to 10th

Payment plan available | **Discount available**

Adult tuition | **WAITLIST ONLY** | \$550.00 | **CONTINUE**

ADD TO CART

Mobile

ACTIVE | Sattvic Retreats | SIGN IN | English (United Stat...)

ACTIVE

Filter | Your cart

Session Selection

Advanced-Yoga
[View more details](#)

12/01/2018 - 11/30/2019 SU, SA, 3:00 PM - 4:30 PM
White Heaven Beach
Ages 10-20 | Male | Grades Pre-K to 10th

Payment plan available | **Discount available**

Adult tuition | **WAITLIST ONLY** | \$550.00

ADD TO CART

Beginner-Yoga
[View more details](#)

12/01/2018 - 11/30/2019

Note: If the payment plan has expired or is configured as internal only, then this tag is not displayed

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