

 *Camp & Class Manager*

Advanced Email Editor Release 9.1

March 19, 2019

Camp and Class Manager Release Notes

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Communications 1.0

In order to allow a higher level of customization in agencies' email communications and marketing efforts, a new three-step communication workflow with improvements to existing features have been implemented in the Admin Site. Agency users can now:

- Customize new templates, emails or reminders by dragging-and-dropping various components.
- Insert dynamic fields in the email subject line to better target recipients and increase opening rates.
- Use a saved, customized template to send emails or reminders.
- Track sent emails or templates with more detailed analytics.
- Send confirmation, reminder, invitation or report emails, or email a family using the new three-step workflow.

For old email templates, the following conversion rules apply:

- When agency users use an old template to create broadcast emails, confirmation emails or reminders, the new workflow is displayed, allowing template reuse or customization. After save, customers will receive the newly converted template.
- When agency users use an old template for campaign emails, the new workflow does not apply and customers will still receive the old template.
- When agency users open an old template directly (Admin Site > **Email** tab > **Templates** link), the new workflow is displayed. After save, the old template is converted to a new template for agency users to create broadcast emails, confirmation emails, reminders or campaign emails, and customers will receive the newly converted template.

New Template Workflow

The new template workflow (Admin Site > **Email** tab > **New** button > **New template**) now contains the following three steps:

Step 1: Template information

In this step, agency users can insert dynamic fields from the following audiences in the subject line by clicking the new **Insert merge fields** dropdown list:

- | | |
|--|---|
| <ul style="list-style-type: none">• Family level<ul style="list-style-type: none">– Primary parent first name– Primary parent last name– Secondary parent first name– Secondary parent last name– Family balance• Participant level<ul style="list-style-type: none">– Participant first name– Participant last name | <ul style="list-style-type: none">• Registration level<ul style="list-style-type: none">– Session name– Session type– Session location name– Session start date– Session end date– Session start time– Session end time– Registration balance– Group Assignment |
|--|---|

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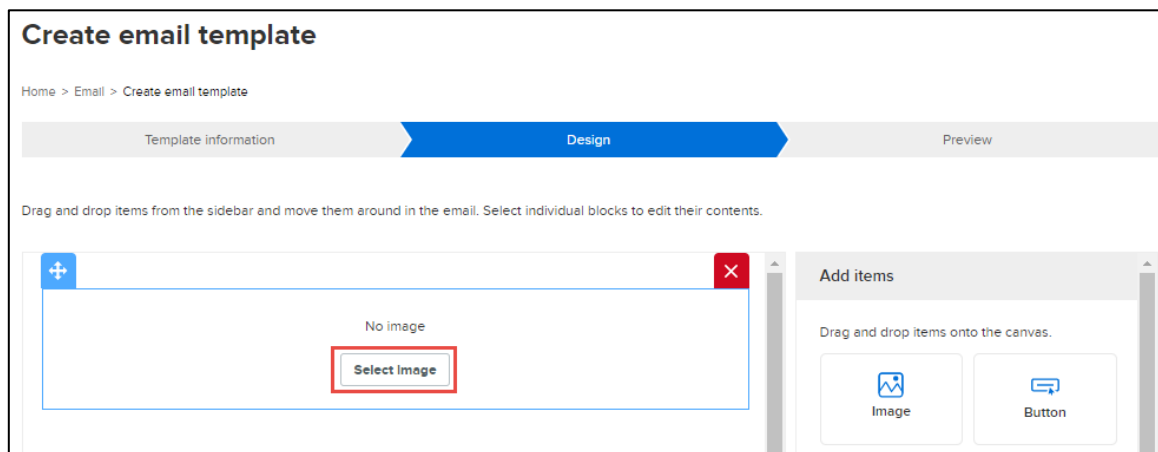
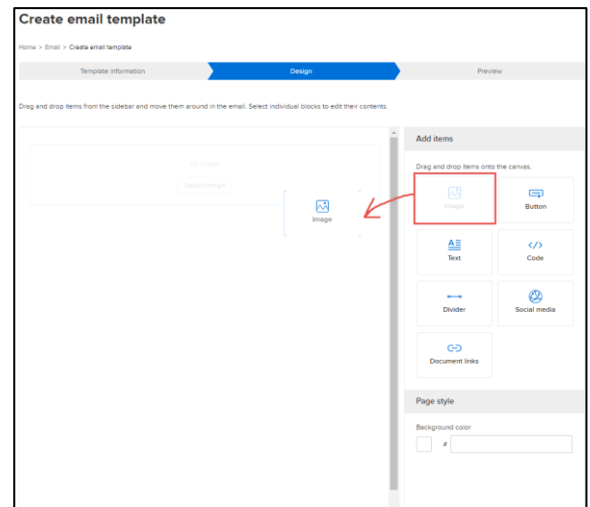
Step 2: Design

In this step, agency users can drag-and-drop different items onto the template canvas, including images, buttons, text, custom HTML code, section dividers, social media links and document links.

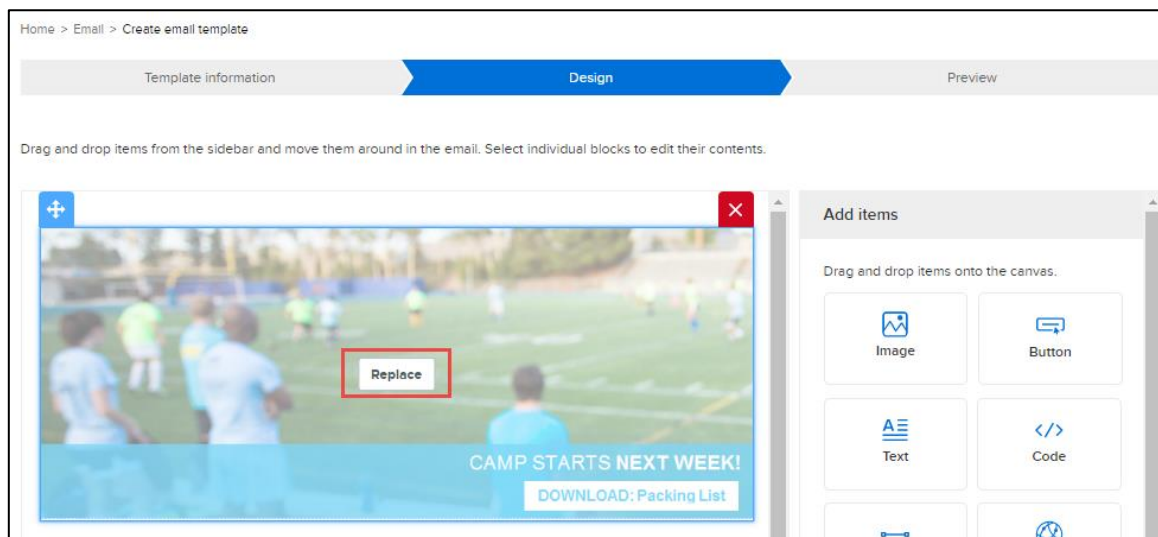
To customize an item, click on the item on the canvas and the item properties will appear in the lower-right corner.

- **Add an image:**
To add an image to the template, under the **Add items** section, drag-and-drop the **Image** icon onto the canvas on the left.

Agency users can then select an existing image from the image library, or upload a new image under 2 MB. On the **Select image** popup, agency users now can search for an image by name or image type.



To replace an inserted image, hover the cursor over the image and then click **Replace**.

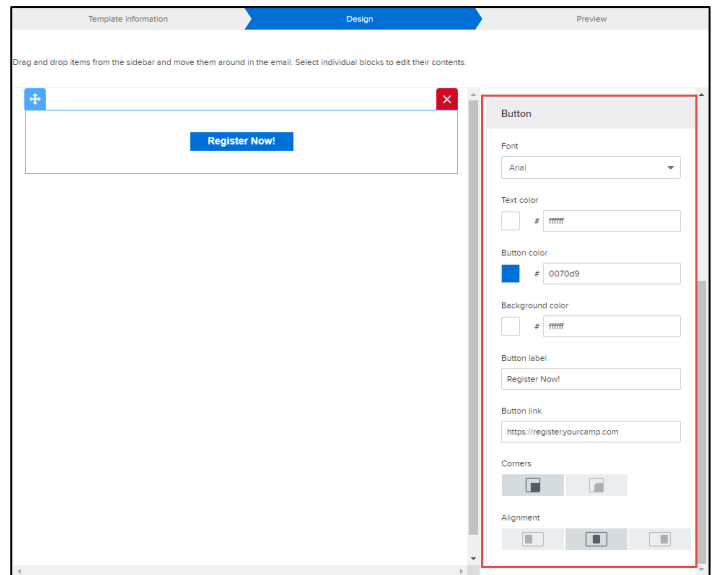


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- Add a button:

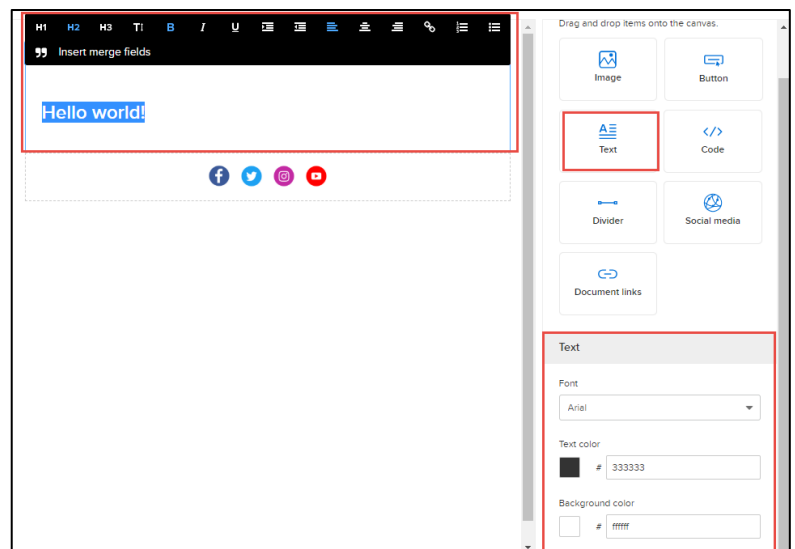
To add a button to the template, drag-and-drop the **Button** icon onto the canvas.

To customize the button, click the item and then edit the **Button** properties as required:



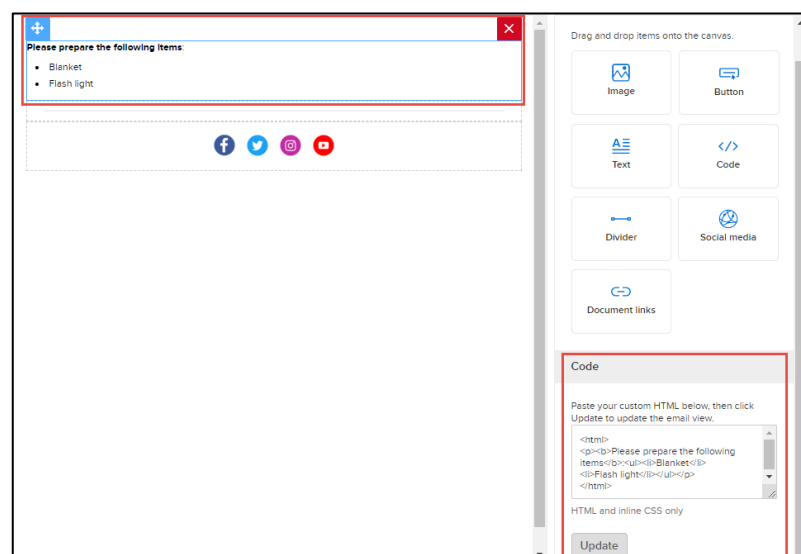
- Add customized text:

To add customized text to the template, drag-and-drop the **Text** icon onto the canvas. Agency users can then type or paste customized text in the editor, or change the text display properties as required.



- Add custom HTML code:

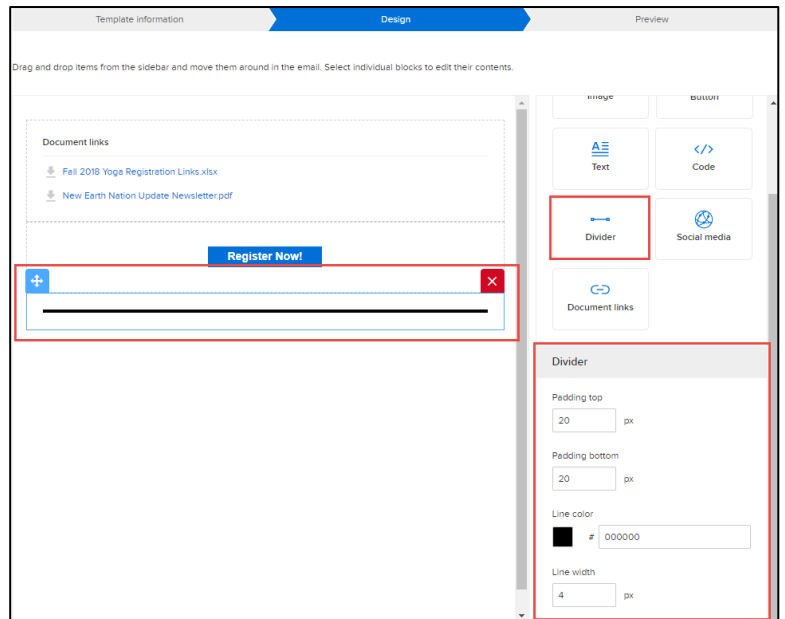
To add custom HTML code, drag-and-drop the **Code** icon onto the canvas, and then type or paste HTML code in the code editor in the lower-right corner. A preview of the code is immediately displayed on the canvas.



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- Add a divider:

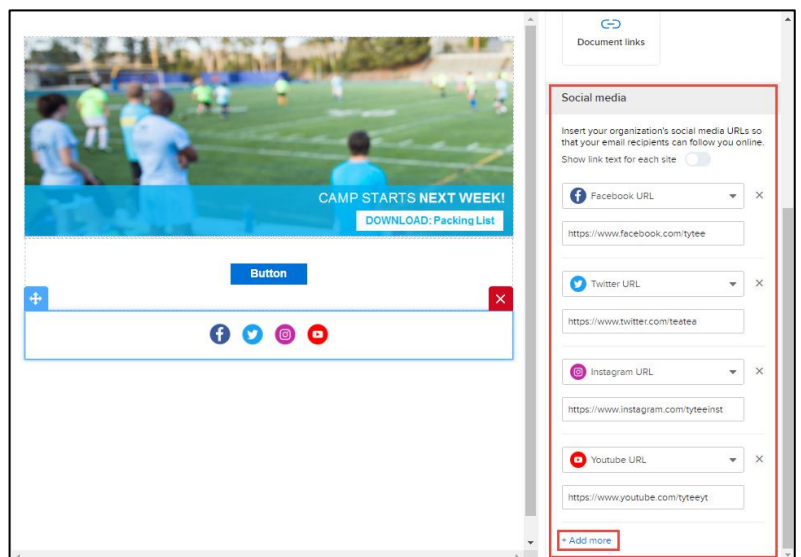
To add a divider to the template, drag-and-drop the **Divider** icon onto the canvas. Agency users can then drag the divider up and down, or change the divider properties (padding, color and width) as required.



- Add social media links:

To add the organization's social media links, drag-and-drop the **Social media** icon onto the canvas. Four types of social media links are available: Facebook, Twitter, Instagram and YouTube. Click + **Add more** to add up to 10 social media links to a template.

Agency users can now customize social media links for each template without affecting the default links configured at the agency level (Admin Site >  icon > **Settings** > **Social media** link), and the agency-level **Social media** page now also includes Instagram and YouTube:

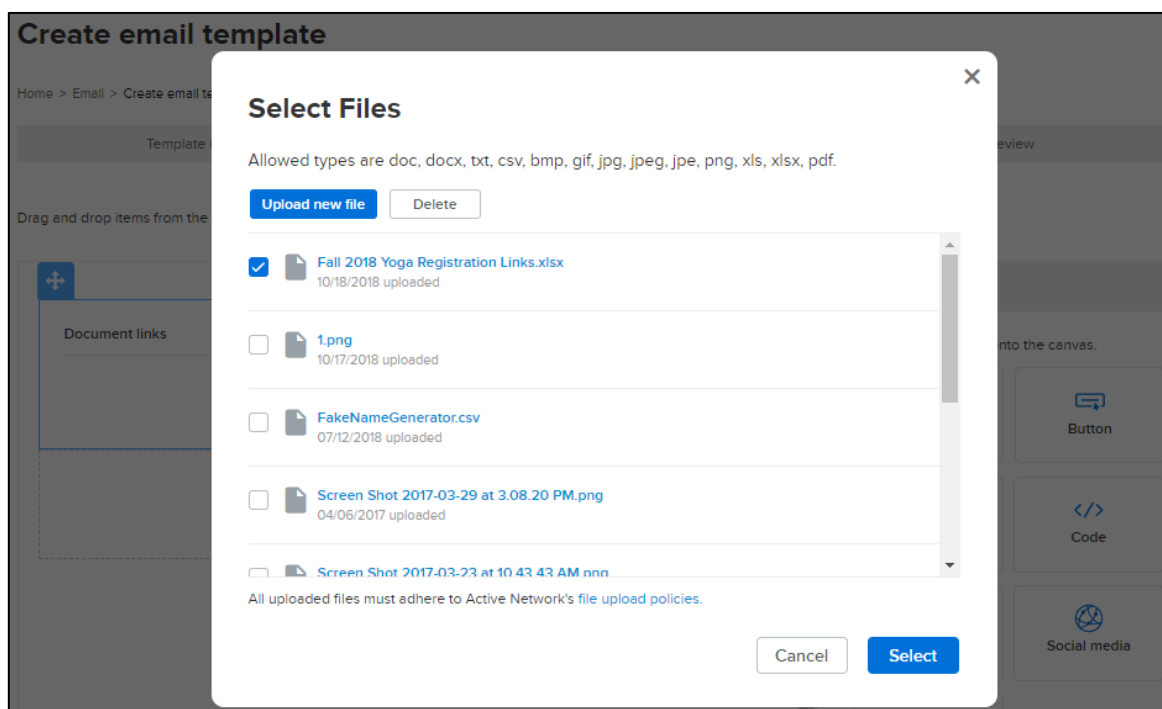
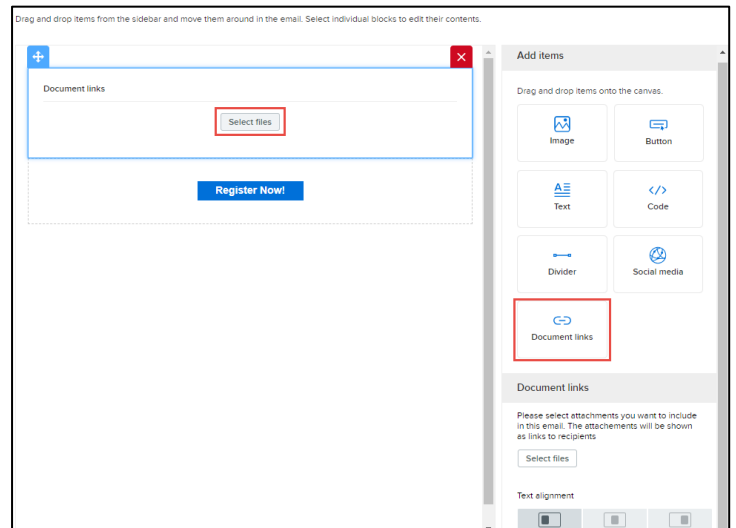


When first-time agency users set up a new season, on the **Account information** page, social media links now also include Instagram and YouTube.

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- **Add document links:**
To add links to documents (such as waivers or registration forms), drag-and-drop the **Document links** icon onto the canvas.

Agency users can then select existing files from the file library, or upload a new file.

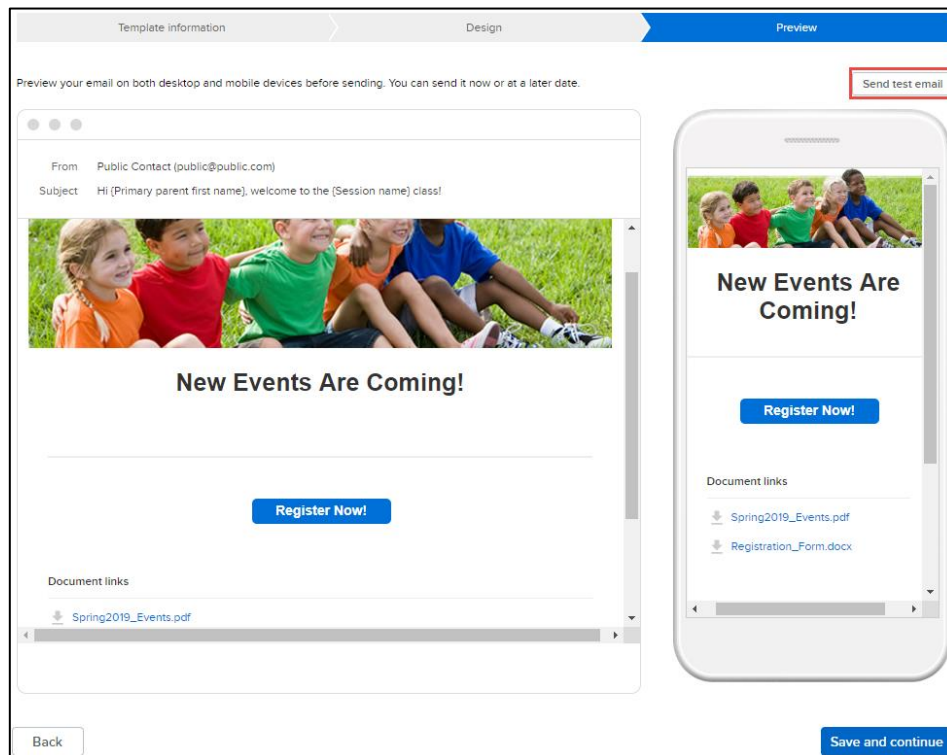


When all required items have been added to the template and customized, click the **Save and continue** button to proceed to the next step.

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Step 3: Preview

In this step, the customized template is displayed in both desktop and mobile previews, and agency users can send a test email to up to five email addresses.



Note: If the template includes merge fields in the subject field, then the test email subject line will display preset, testing values different from the actual email subject line. For example:

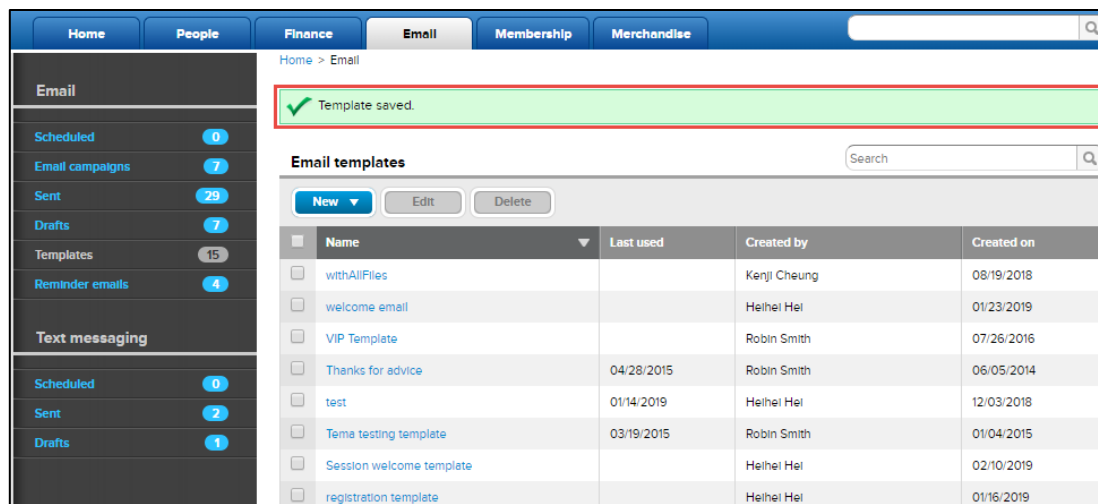
Test email received:



Actual email received:



After clicking the **Save and continue** button on the **Preview** page, the new template is now saved.



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Season Setup: Confirmation/Reminder/Invitation Email using New Template Workflow

During season setup, the new template workflow appears when agency users edit confirmation email or reminder email (cart abandonment email) templates for a particular season.

Confirmation email:

Location: **Home** tab > a season > **Setup** > **Settings** > **Confirmation email** > **Confirmation email** section

Step 8: Confirmation email

Confirmation email

Customize the email registrants automatically receive when they register.

From: Sattvic Retreats (public@public.com)

Subject: {Participant}'s registration confirmation for {season}

Registered on: {Reg date}

Balance: {Season balance}

Sessions

{Session Name}

{Date, Times}

{Location}

{Classroom name}

{Instructor name}

Customize

Status: Active

See a preview

Settings

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

Frequently asked questions

How can I customize the text for different

After clicking the **Customize** button, the new template workflow is displayed.

Customize confirmation email

Home > Confirmation email > Customize confirmation email

Template information Design Preview

Subject * {Participant}'s registration confirmation for {season}

From Sattvic Retreats (public@public.com)

Exit Save and continue

Note:

For the **Text** item in the **Design** step of a confirmation email, agency users can now:

- Edit and delete the default “Thank you for registering” text editor item in the default confirmation email template (other default text editors are not editable and cannot be deleted).
- Select which sessions the customized text will be displayed for by using the new **Conditional Display** property. If specific sessions are selected, then in the **Preview** step, a reminder message is displayed.

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Reminder email (cart abandonment email):

Location: **Home** tab > a season > **Setup** > **Settings** > **Confirmation email** > **Reminder Email** section checkbox

Step 8: Confirmation email

Confirmation email

Customize the email registrants automatically receive when they register.

From: Sattvic Retreats (public@public.com) [Customize](#)

Subject: {Participant}'s registration confirmation for {season}

Registered on: {Reg date}
Balance: {Season balance}

Sessions
{Session Name}
{Date, Times}
{Location}
{Classroom name}
{Instructor name}
{Purchases}
{Group assignment}

Important links

[Add to your calendar](#)
[Manage your online account](#)
[Create website](#)

Reminder email

Customize the email registrants automatically receive when they register.

☒ Send this email 24 hours after the prospective registrant abandons their cart. It focus on marketing to encourage the customer to come back and register for the event.

From: Sattvic Retreats (public@public.com) [Customize](#)

Subject: Register Now !

ACTIVE

Status: Active

[See a preview](#)

Settings

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

Frequently asked questions

How can I customize the text for different sessions?

How am I notified when people register?

The default subject contains {Participant} and {season}. What are these?

What address is the confirmation email sent to?

Can I send a copy of the confirmation email to multiple addresses?

After clicking the **Customize** button, the new template workflow is displayed.

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

Customize reminder email

Home > Confirmation email > Customize reminder email

Template information Design Preview

Subject * Register Now !

From Sattvic Retreats (public@public.com)

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New Email Workflow

The new email workflow (Admin Site > **Email** tab > **New** button > **New email**) now contains the following three steps, which are similar to the template workflow:

Step 1: Email Information

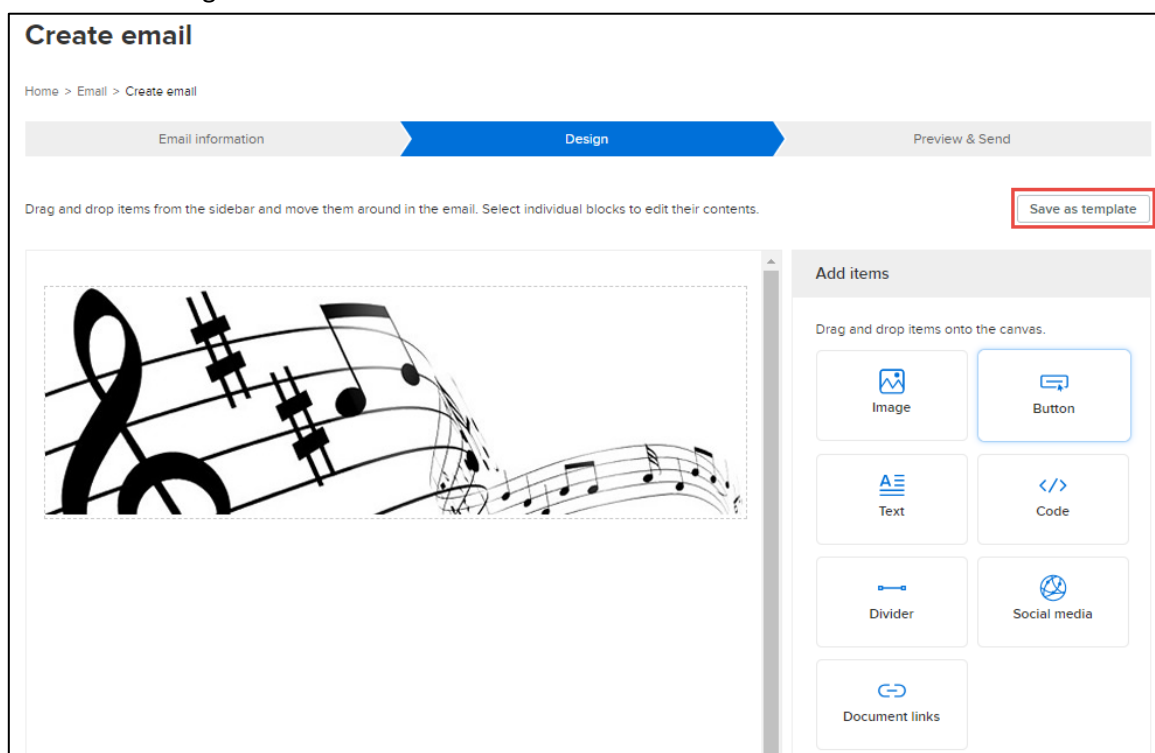
In this step, agency users can insert dynamic fields for the following audiences in the subject line by clicking the **Insert merge fields** dropdown list:

- Family level
 - Primary parent first name
 - Primary parent last name
 - Secondary parent first name
 - Secondary parent last name
 - Family balance
- Participant level
 - Participant first name
 - Participant last name
- Registration level
 - Session name
 - Session type
 - Session location name
 - Session start date
 - Session end date
 - Session start time
 - Session end time
 - Registration balance
 - Group Assignment

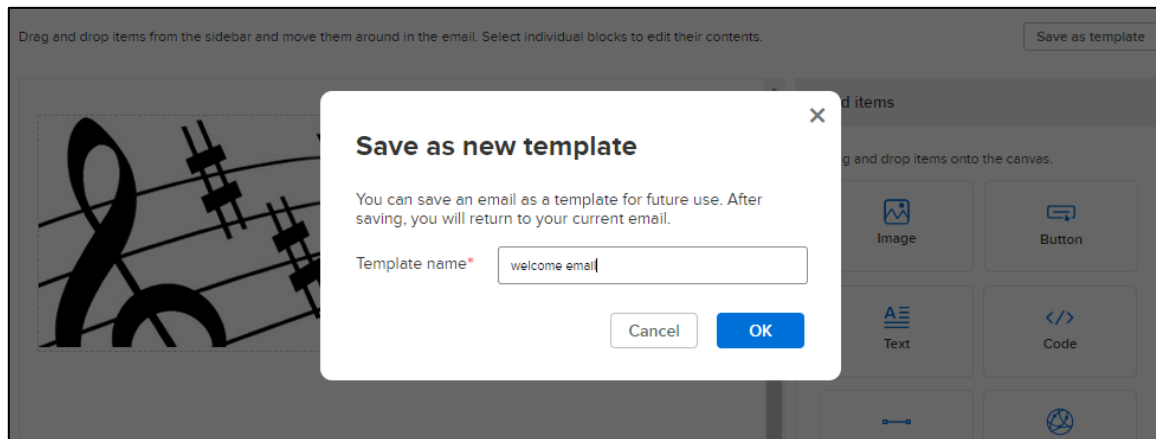
Step 2: Design

In this step, the same items as in the template workflow are available to be dragged-and-dropped onto the canvas. See section [New Template Workflow > Step 2: Design](#) for detailed information on each item.

During email design, agency users can now save the email as a template by clicking the **Save as template** button, and then reuse it when creating other emails:



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Step 3: Preview & Send



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Sending Reports using New Email Workflow

When sending the following reports or forms, after agency users select the required recipients and then click the **Send email** or **Email selected people** button, the new email workflow is displayed. The path displayed on the email page indicates which specific report or form the email is for.

- Financial reports (Admin Site > **Finance** tab > **Reports** tab):
 - Accounts receivable** report
 - Credit balance** report
 - Deferred revenue** report
 - Failed payment** report
 - Payment plan** report
- Member roster report** (Admin Site > **Membership** tab > **Member roster report** link)
- Season reports (Admin Site > **Home** tab > a season > **Reports**):
 - Cart abandonment e-mail report** (note: emailing this report does not support **Insert merge fields** in the email subject line)
 - Daily Attendance Report**
 - Participant attendance report**
 - Waitlist report**
 - New custom report** or saved custom report
- Merchandise **Fulfillment report** (Admin Site > **Merchandise** tab > **Fulfillment report** link)
- Season supplemental forms (Admin Site > **Home** tab > a season > **Supplemental forms** tab)
- Session dashboard report (Admin Site > **Home** tab > a season > **Sessions** > **Send email** button)

The following screenshots use the merchandise **Fulfillment report** as an example:

Fulfillment report

Merchandise setup > Fulfillment report

Share Export Search

Fulfillment report

Season: Yoga 2018-2019 Sessions: All sessions Edit

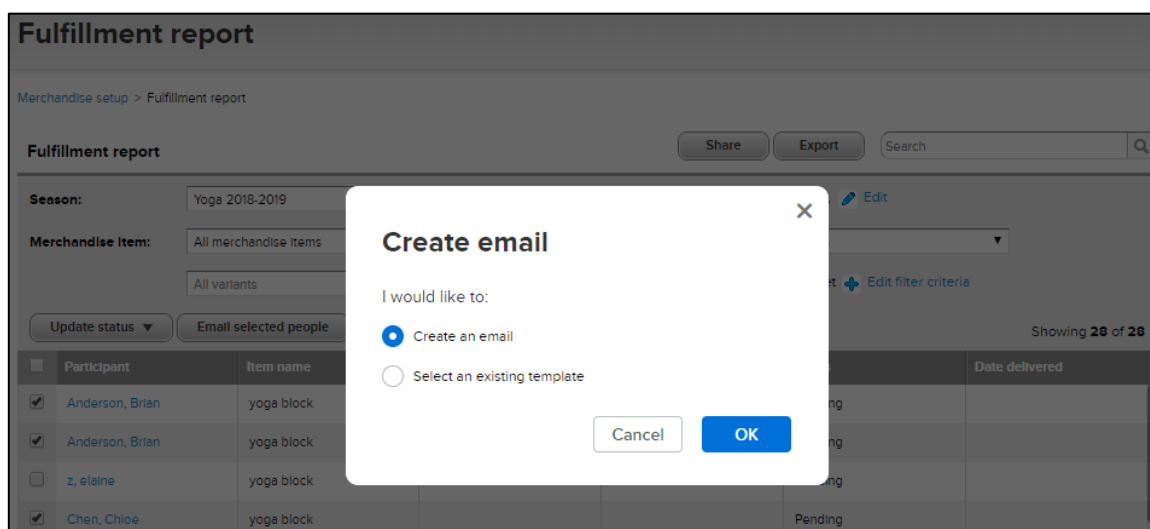
Merchandise Item: All merchandise items Status: All statuses

All variants Filters: No filters set Edit filter criteria

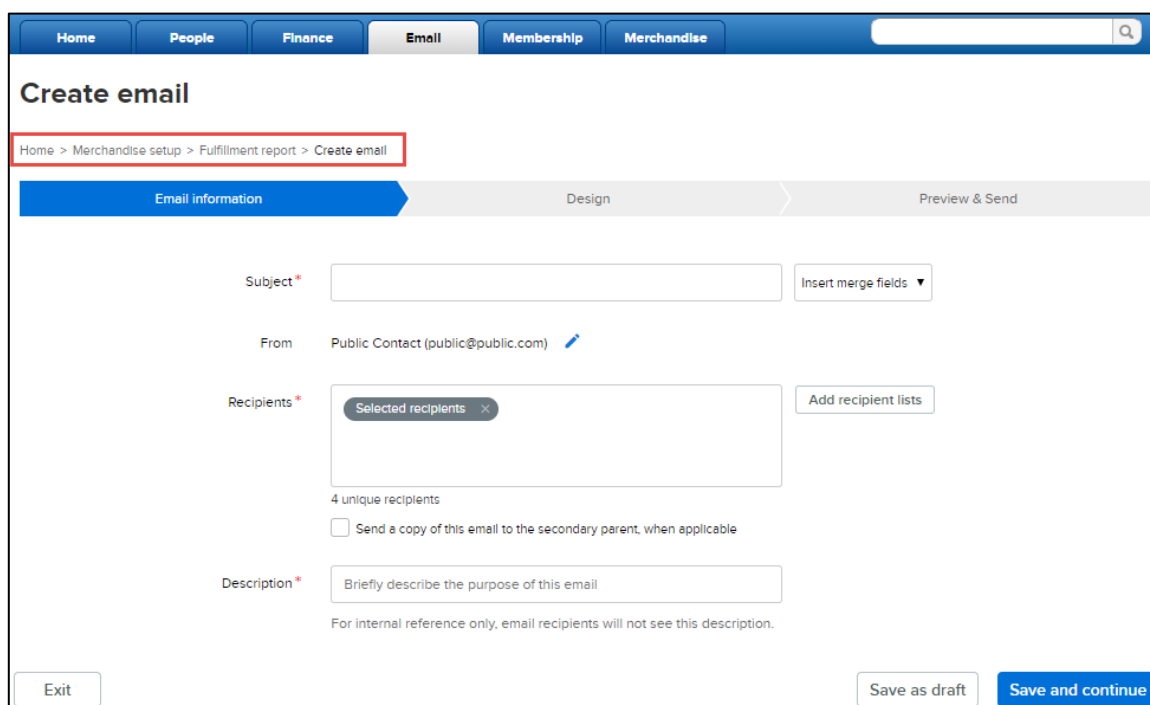
Update status Email selected people Showing 28 of 28

	Participant	Item name	Variant	Item SKU	Status	Date delivered
<input checked="" type="checkbox"/>	Anderson, Brian	yoga block			Pending	
<input checked="" type="checkbox"/>	Anderson, Brian	yoga block			Pending	
<input type="checkbox"/>	z, elaine	yoga block			Pending	
<input checked="" type="checkbox"/>	Chen, Chloe	yoga block			Pending	
<input checked="" type="checkbox"/>	Smith, John	yoga clothes			Pending	
<input checked="" type="checkbox"/>	Decker, Evelyn	yoga clothes			Pending	

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In this example, on the **Create email** page, the path indicates that this email is for the merchandise fulfillment report:



Emailing Family using New Email Workflow

When agency users send emails to the following recipients, the new email workflow is displayed.

- Family (Admin Site > **People** tab > **Parents** > a parent > **Send email**)
- Participant (Admin Site > **People** tab > a person > **Current seasons** > **View** > **Send email**)

Note: in this case, the **Recipient** field is pre-filled with the selected family or participant and cannot be changed.

New features include:

- Create an email from an existing template when emailing families or participants.
- If using an existing template, then changing the email subject will not affect the original template.
- In the **Subject** field, insert the following family-level dynamic fields from the **Insert merge fields** dropdown list to better target the email subject and increase opening rates:

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- Primary parent first name
 - Primary parent last name
 - Secondary parent first name
 - Secondary parent last name
 - Family balance
- Send a copy of the email to secondary parent by clicking the new checkbox:

The screenshot shows the 'Send email' interface with the 'Email information' step selected. The form includes fields for Subject, From, Recipient, and Description. A red box highlights the 'Send a copy of this email to the secondary parent, when applicable' checkbox, which is checked. Another red box highlights the 'Insert merge fields' dropdown menu, which is open and shows options: Primary parent first name, Primary parent last name, Secondary parent first name, Secondary parent last name, and Family balance.

- In the **Design** step, include a financial statement by dragging the **Document Link** icon onto the canvas.
 - If the **Include link to financial statement** checkbox is checked, then all seasons are included in the financial statement by default. Agency users can uncheck seasons as required.

The screenshot shows the 'Send email' interface in the 'Design' step. The 'Document links' sidebar is open, showing a 'Financial statement' icon. A red box highlights this icon. Another red box highlights the 'Include link to financial statement' checkbox, which is checked. Below this checkbox, there is a section for selecting seasons to include in the statement, with a dropdown menu set to 'All seasons' and several checkboxes selected: Any, Art Classes Summer 2017, Fashion Me Now - G Testing, and Yoga 2018-2019.

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New Reminder Workflow

The new reminder workflow (Admin Site > **Email** tab > **New** button > **New reminder**) now contains the following three steps, which are similar to the template workflow:

Step 1: Reminder information

In this step, agency users can insert dynamic fields for the following audiences in the subject line by clicking the **Insert merge fields** dropdown list:

- Family level
 - Primary parent first name
 - Primary parent last name
 - Secondary parent first name
 - Secondary parent last name
 - Family balance
- Participant level
 - Participant first name
 - Participant last name
- Registration level
 - Session name
 - Session type
 - Session location name
 - Session start date
 - Session end date
 - Session start time
 - Session end time
 - Registration balance
 - Group Assignment

Agency users can now select multiple sessions from different seasons using the **Select seasons** dropdown list and **Select sessions** radio button (previously, the **Select sessions** option was only available when a single season was selected):

The image shows three screenshots of the new reminder workflow interface. The top-left screenshot shows the 'Select seasons' dropdown menu with options: 'All seasons', 'Any', 'Yoga 2018-2019', and 'Fashion Me Now - G Testing'. The top-right screenshot shows the 'Select sessions' radio button selected, with a '0 selected' indicator and a 'Done' button. The bottom screenshot shows the 'Create reminder email' screen with the 'Select sessions' modal open. The modal displays a table of sessions with columns for Session Name, Date, and Location. The table lists 7 sessions, with 5 sessions selected (Advanced-Yoga, Beginner-Yoga, Fashion Me now part 2, Fashion Me now part 3, and Fashion Me now part 4). The modal also includes a search bar, a 'Only show selected sessions' checkbox, and 'Cancel' and 'Save' buttons.

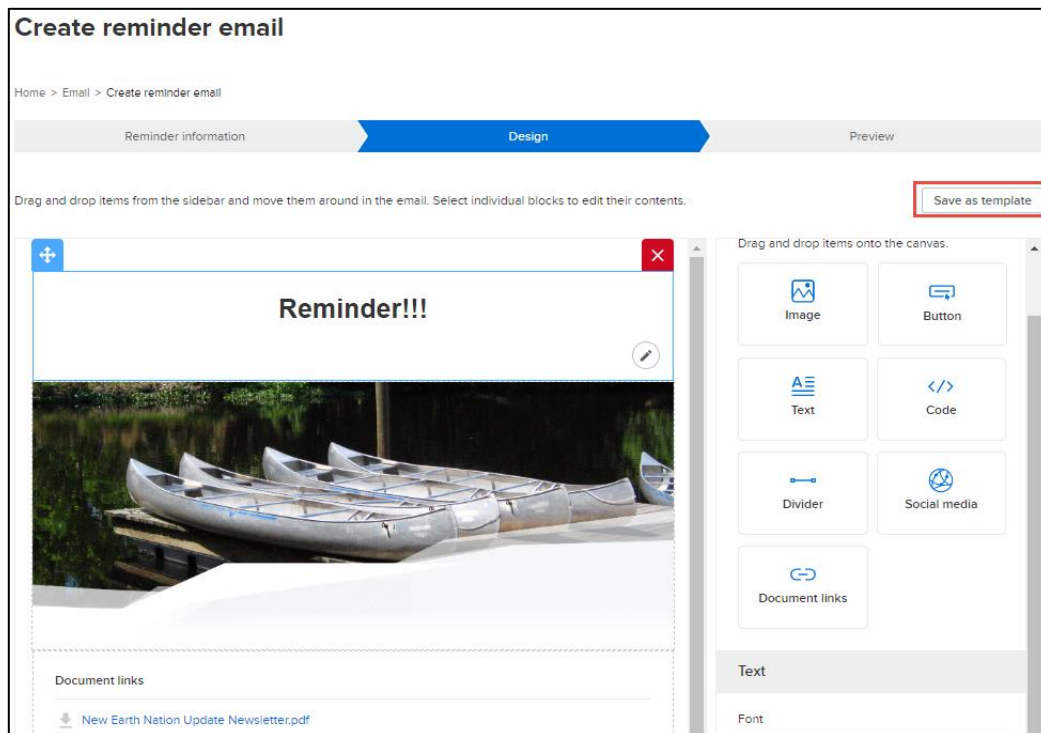
Session Name	Date	Location
<input checked="" type="checkbox"/> Advanced-Yoga	12/01/2018 - 11/30/2019	White Heaven Beach
<input checked="" type="checkbox"/> Beginner-Yoga	12/01/2018 - 11/30/2019	Chengdu
<input type="checkbox"/> bickhvAKid	09/28/2018 - 11/30/2018	Trinity College - Seattl...
<input type="checkbox"/> Fashion Me now part 1	01/31/2018 - 01/31/2022	Camp Hidden Pines
<input checked="" type="checkbox"/> Fashion Me now part 2	11/16/2018 - 11/16/2019	The Palouse
<input checked="" type="checkbox"/> Fashion Me now part 3	06/27/2018 - 12/31/2019	Richland Desert
<input checked="" type="checkbox"/> Fashion Me now part 4	12/28/2018 - 12/31/2019	Community Building
<input type="checkbox"/> Fashion Me now part 5	05/31/2018 - 12/31/2018	Trinity College - Spoka...
<input type="checkbox"/> Fashion Me now part 6	05/31/2018 - 12/31/2018	Community Building
<input type="checkbox"/> Fashion Me now part 7	05/31/2018 - 12/31/2018	Community Building

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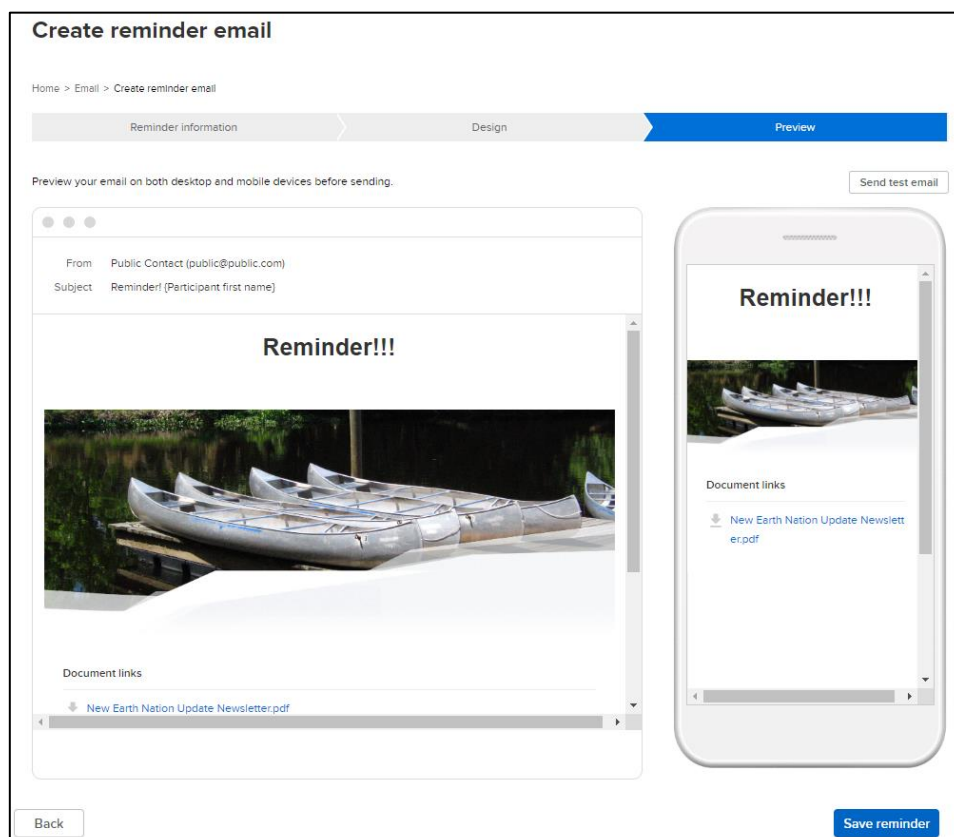
Step 2: Design

In this step, the same items as in the template workflow are available to be dragged-and-dropped onto the canvas. See section [New Template Workflow > Step 2: Design](#) for detailed information on each item.

During reminder email design, agency users can now save the reminder email as a template by clicking the **Save as template** button, and then reuse it when creating other reminder emails.



Step 3: Preview



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User Interface Improvements

For a better user experience, improvements have been applied to the following communication features:

Add recipient lists

A more user-friendly **Add recipient lists** popup now appears when:

- Creating a new broadcast or campaign email (Admin Site > **Email** tab > **New** button > **New email/New campaign** > **Add recipient lists** button)
- Creating a text message (Admin Site > **Email** tab > **Text messaging** section > **Scheduled/Sent/Drafts** link > **New text message blast** button > **Select recipient** button)

The screenshot shows a modal window titled "Add recipient lists" with a close button (X) in the top right corner. Below the title, it says "Select the required recipient lists." There are three buttons: "New list" (highlighted in blue), "Edit", and "Delete". Below these buttons is a table with the following columns: "List name", "Recipients", "Created by", and "Created on". The table has one row with the following data: "Dance class list" (with a checkbox), "Dynamic", "Robin Smith", and "12/05/2018". Below the table, there is a note: "* The number of recipients in a dynamic list may change over time." At the bottom right, there are "Cancel" and "Select" buttons.

<input type="checkbox"/>	List name	Recipients	Created by	Created on
<input type="checkbox"/>	Dance class list	Dynamic	Robin Smith	12/05/2018

Agency users can select from existing recipient lists or create a new list.

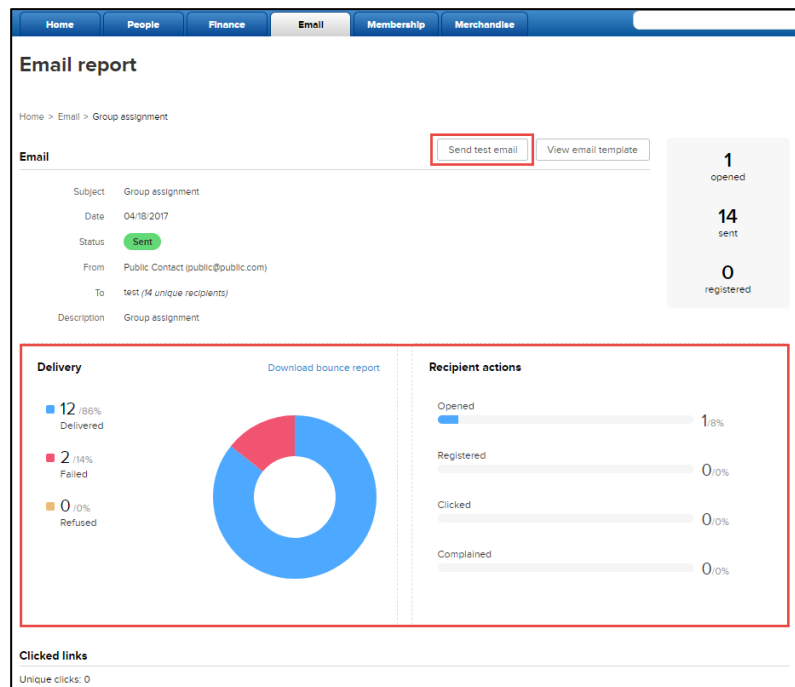
The screenshot shows the "Create recipient list" page in the Admin Site. The top navigation bar includes "Home", "People", "Finance", "Email" (selected), "Membership", and "Merchandise". The page title is "Create recipient list". Below the title, there is a breadcrumb trail: "Home > Email > Create text message > Create recipient list". The main content area is divided into two sections: "Recipient list settings" and "Recipients". The "Recipient list settings" section has a "Types of recipients" section with two radio buttons: "Dynamic list" (selected) and "Imported list". The "Recipients" section has a "Registered for" section with three checkboxes: "Select seasons", "Select sessions", and "Registration date". The "Select seasons" checkbox is checked, and there is a "Select seasons" button. The "Select sessions" checkbox is unchecked, and there are two radio buttons: "All sessions" (selected) and "Selected sessions". The "Registration date" checkbox is unchecked, and there is a dropdown menu for "All registration dates". The "Not registered for" section has a "Select seasons" checkbox, which is checked, and a "Select seasons" button. On the right side of the page, there is a "Frequently asked questions" section with four questions: "How do I email past participants who have not yet registered for the current season?", "How do I email only participants with a balance owing?", "How do I import a recipient list from my contact records?", and "Why did my contact import fail?".

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Email report

The following improvements have been implemented in the **Email report** (Admin > Email tab > Email section > Sent link > sent email)

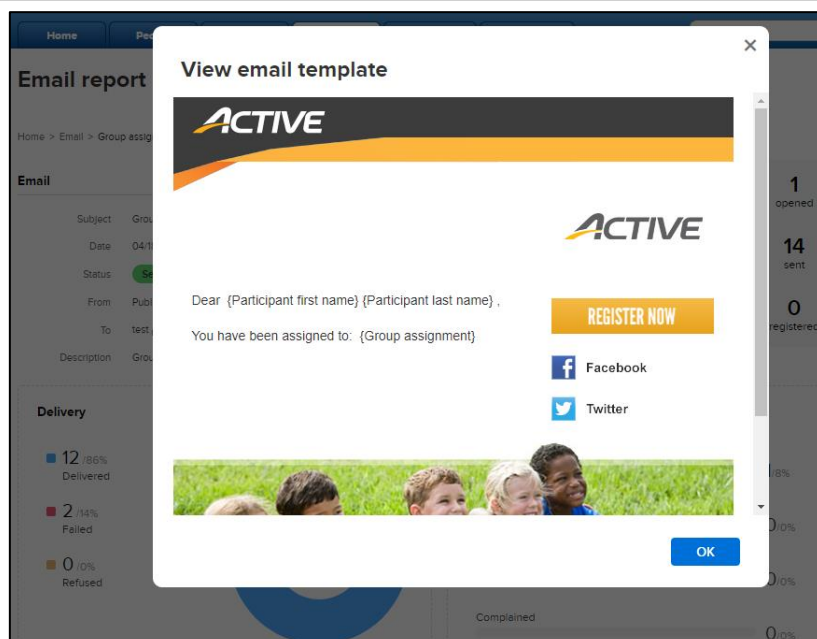
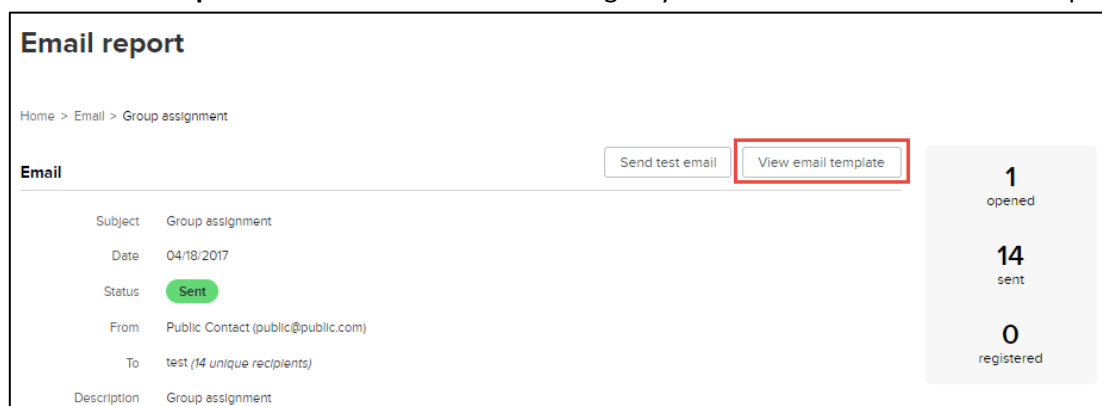
- The **Send test email** link is now a button.
- **Delivery** statistics are now displayed as a pie chart.
- **Recipient actions** statistics are displayed as bar charts.



Site
a

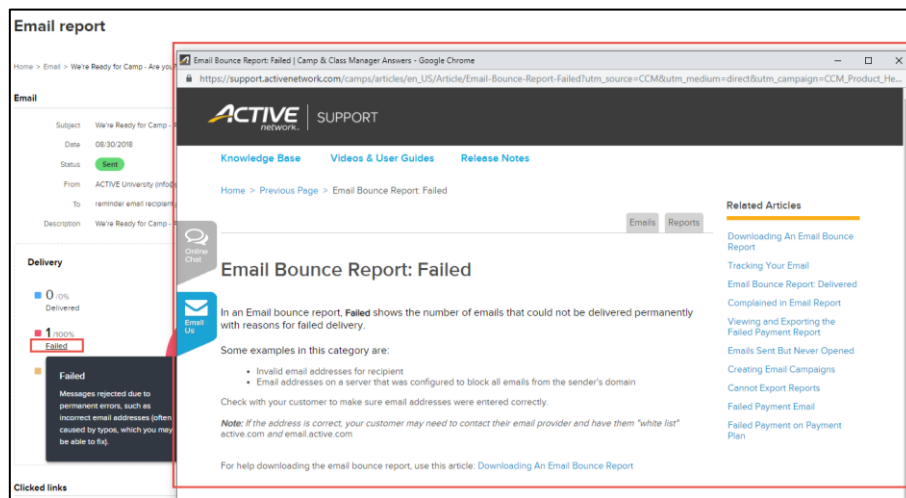
now

- A **View email template** button has been added for agency users to view the sent email template.



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- Under the **Delivery** and **Recipient actions** sections, hovering the cursor over a status label now displays an explanatory tooltip. Clicking the status label link opens the relevant support page.

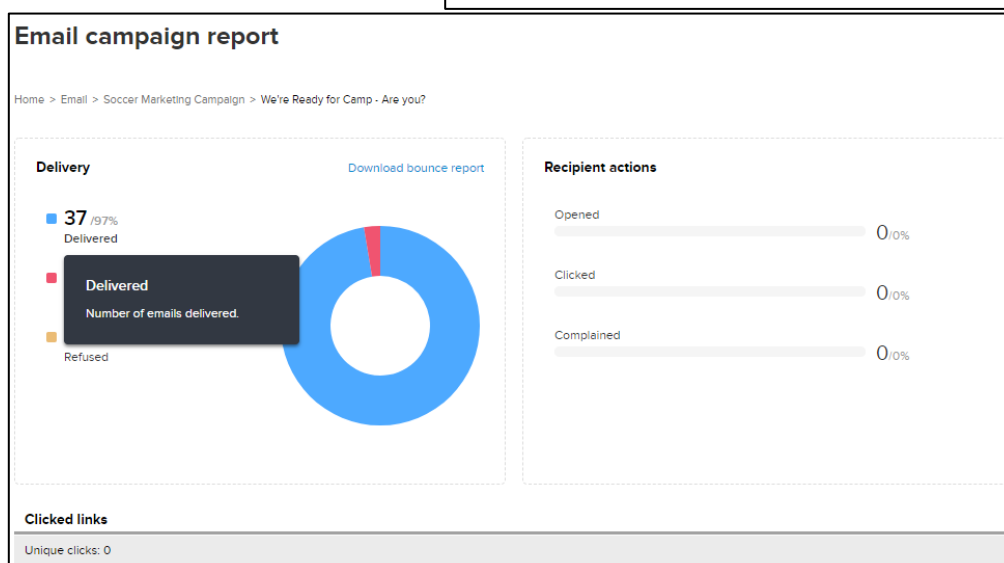
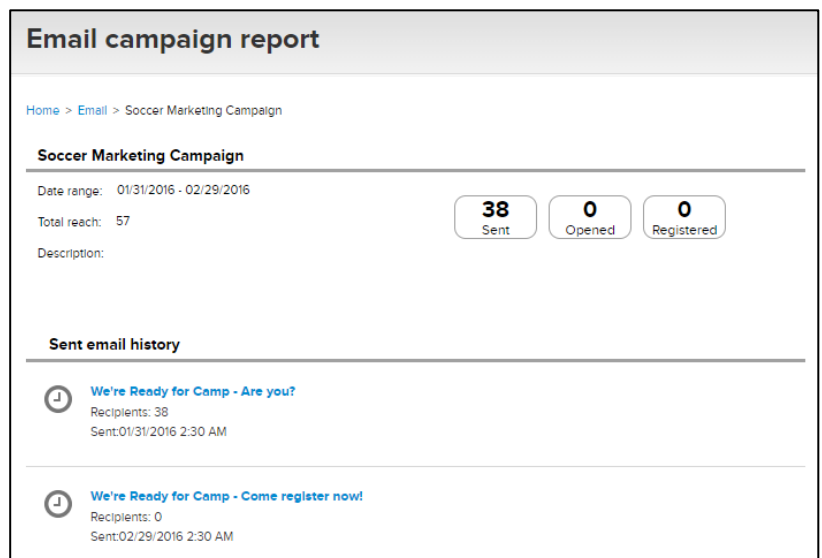


Email campaign report

The **Email campaign report** now has a new appearance (Admin Site > **Email** tab > **Email** section > **Email campaigns** link > check a sent campaign checkbox > **View report** button):

Under the **Sent email history** section, clicking a sent email link opens the detailed report for that email. The following enhancements have been implemented:

- Delivery** statistics are now displayed as a pie chart.
- Recipient actions** statistics are now displayed as bar charts.
- Under the **Delivery** and **Recipient actions** sections, hovering the cursor over a status label now displays an explanatory tooltip. Clicking the status label link opens the relevant support page.



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Creating an email campaign: Insert merge fields

When creating an email campaign (Admin Site > **Email** tab > **New** button > **New campaign**), the new **Insert merge fields** dropdown list is now available for agency users to insert the following dynamic fields in the subject line:

- Family level
 - Primary parent first name
 - Primary parent last name
 - Secondary parent first name
 - Secondary parent last name
 - Family balance
- Participant level
 - Participant first name
 - Participant last name
- Registration level
 - Session name
 - Session type
 - Session location name
 - Session start date
 - Session end date
 - Session start time
 - Session end time
 - Registration balance
 - Group Assignment

Confirmation emails

In confirmation emails received by parents or registrants:

- The **Supplemental forms** section has been moved up to a more prominent location for recipients to see:

Desktop

Supplemental forms	
ExtralongfilenameExtralongfilenameExtralongfilename.pdf Due 120 days before session start date	Participant driving licence Due 120 days before session start date
Offline E-waiver to Collect_Please hand over when session begins.doc Due by 21/12/2019	Hotel Accommodations Due by 21/12/2019

Dear Camper,

On behalf of The Philadelphia Phillies, this is a confirmation email for your 2019 Phillies Phantasy Camp enrollment. The countdown to your phantasy has begun and all of us are excited that you will be on the team!

Below are a few items to note and complete as we help prepare you for your experience:

Please complete Side 1 of the Health History Record as an on-line follow up form that is located in your online account. Have your physician complete Side 2 and upload the completed form to your account or **return it to us by December 15, 2018.**

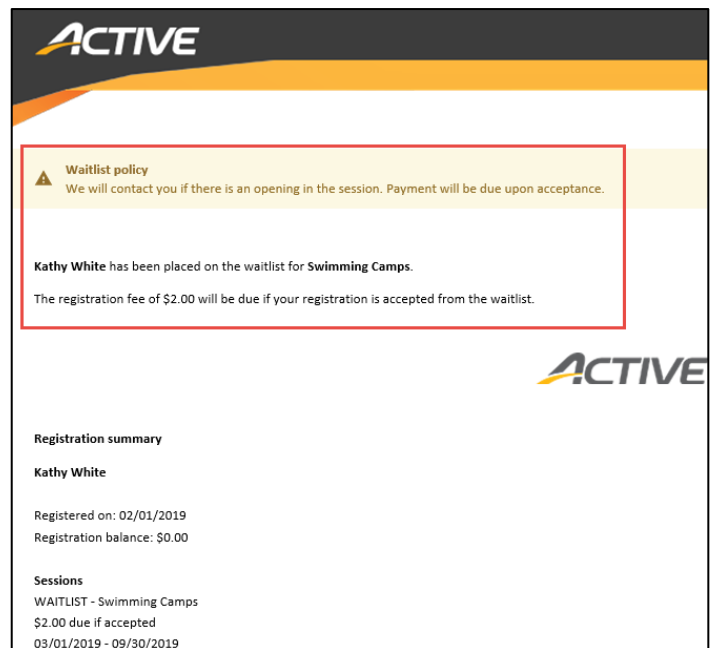
Mobile

Supplemental forms

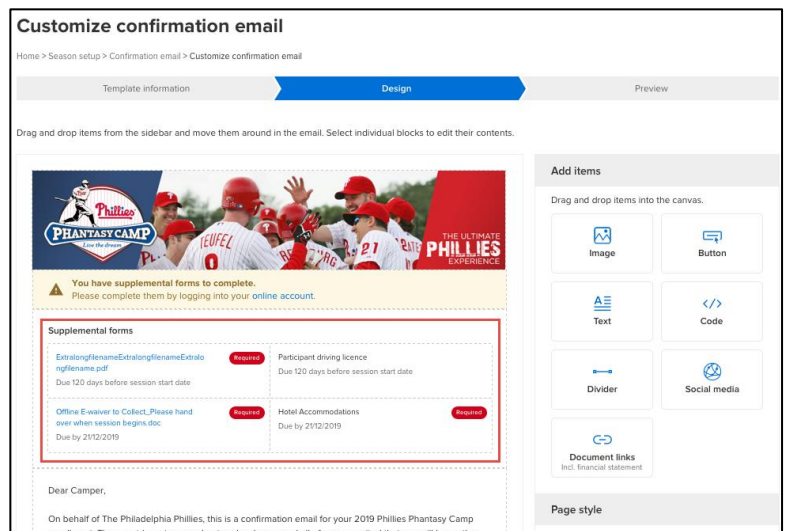
ExtralongfilenameExtralongfilenameExtralongfilename.pdf Due 120 days before session start date	Participant driving licence Due 120 days before session start date
Offline E-waiver to Collect_Please hand over when session begins.doc Due by 21/12/2019	Hotel Accommodations Due by 21/12/2019

Camp and Class Manager Release Notes

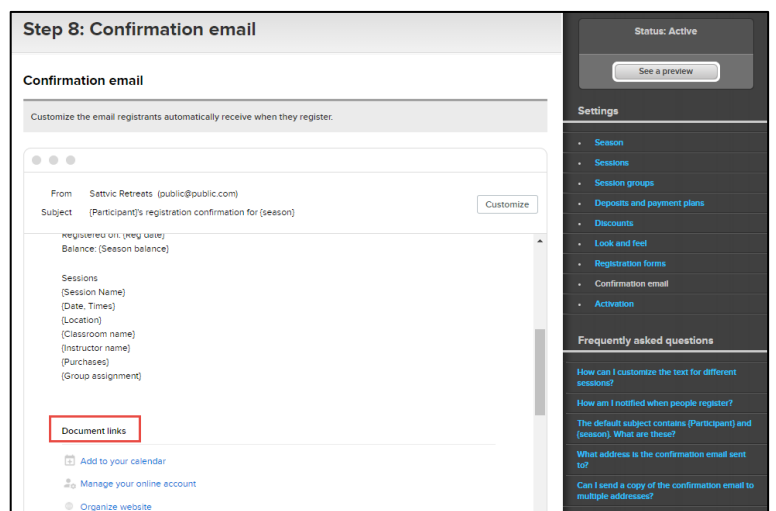
- If some or all sessions purchased in a registration are waitlisted, then a waitlist message is displayed (if all purchased sessions are waitlisted, then the balance due for the registration is also displayed):



The above enhancements also apply when agency users edit the confirmation email template by clicking the Admin Site > **Home** tab > a season > **Setup > Settings > Confirmation email > Confirmation email section > Customize** button.



In addition, in the confirmation email, the section heading "Important links" has been changed to "Document links":



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