

Release Notes 8.15  
Tuesday, Dec. 18th, 2018



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## Categorize eCheck Returns

To differentiate eCheck return transactions from other refunds, on the order detail page (AUI > **People** tab > a person > **Order history** > an order):

- In the **View transactions** column, eCheck transactions are now labeled as “ECP Returns”.
- In the **Refunds** column, the negative refund amount is displayed in red brackets.

[Home](#)
[People](#)
[Finance](#)
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[Membership](#)
[Merchandise](#)

Contact Information

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Edit

Order #C-5B8THJ833MM

View customer

Resend email

Apply discount

Balance

\$100.00

Make a payment

Remaining balance

\$100.00

Please pay immediately

Current state of this order

	Item	Total	Amount paid	Balance
Actions	<div>Beginning Tabata - Class Fee</div> <div>06/01/2018 - 11/30/2018</div> <div>Lewis and Clark High School</div> <div>Nemo Cheung</div> <div>Tuition</div> <div>Class Fee - \$100.00</div>	\$100.00	(\$0.00)	\$100.00
	Total	\$100.00	(\$0.00)	\$100.00

Transaction history for this order

View transactions	Date/time	Payments	Refunds	Entered by
<div>Sale</div> <div>View transactions</div>	04/20/2018 7:43 PM	----	----	Nemo Cheung
<div>Payment</div> <div>View transactions</div>	04/20/2018 7:49 PM	\$100.00	----	----
<div>ECP Returns</div> <div>View transactions</div>	04/20/2018 8:00 PM	----	(\$100.00)	Nemo Cheung

## Multiple Price Tiers: Edit previous early-bird purchases

When editing an early-bird purchase that was made before the release of the new price-tier feature, an “Early bird price” label is now displayed.

Location: AUI > **People** tab > a person > **Order history** tab > an order > **Actions** > **Edit purchases**

### Change registration

Change the registration of ELaine A from:

**ELaine A**  
Fashion Me now part 6 (05/31/2018 - 12/31/2018)  
Community Building

**\$72.00**  
Amount paid

Price 2	\$30.00	<b>\$0.00</b> Remaining balance
lunch	\$20.00	
Box	\$10.00	
abc	\$12.00	
<b>Total:</b>	<b>\$72.00</b>	

Modify registration for ELaine A

Session
Form questions

**Fashion Me now part 6** (05/31/2018 - 12/31/2018)  
Community Building

Select a tuition

<input checked="" type="radio"/> Price 1	Early bird price:	\$90.00	Edit ▼	Unlimited
<input type="radio"/> Price 2		\$100.00		Unlimited

Select session options

<input checked="" type="checkbox"/> lunch	Qty.	1	Price	\$20.00	Edit ▼	Spots left	Unlimited
---	------	---	-------	---------	--------	------------	-----------

Select merchandise

<input checked="" type="checkbox"/> Box	Qty.	1	Price	\$10.00	Edit ▼	Items left	Unlimited
<input checked="" type="checkbox"/> abc		1		\$12.00	Edit ▼		Unlimited
<input type="checkbox"/> Dancing 2017 T-shirt		1		\$15.00			Unlimited
<input type="checkbox"/> Petite rib bodycon mini dress with horn buttons Options available			From \$32.00				

## Support Chargebacks

Previously in CCM, chargebacks (direct return transactions between customers and their banks) were categorized as "Payments". To correctly treat chargebacks as refunds, the following updates have been applied:

### Home page:

Under the AUI > **Home** tab > **Next payment from ACTIVE** section, the remittance amounts are now calculated with chargebacks counted as refunds.

**ACTIVEworks** | Camp & Class Manager

Heihei Hei

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

### MOR

**Seasons**

[Create a season](#) View: [Current seasons](#)

Season Name	Dates	Status	Registrations Collected	Total Sales
<b>French Training Class</b>	Monday, July 23, 2018 - Thursday, February 28, 2019	Active	3	\$909.00
<b>CFR SEASON</b>	Tuesday, January 23, 2018 - Wednesday, July 31, 2019	Active	24	\$18,236.00
<b>Dance Dance Club</b>	Sunday, December 9, 2018 - Sunday, December 30, 2018	Active	3	\$390.00
<b>AlaTestSeason</b>	Sunday, December 10, 2017 - Thursday, February 28, 2019	Draft	3	\$51.00

**Quick Links**

**Link to attendance portal**  
Allow coaches or teachers to mark attendance of participant directly from the attendance portal.  
[Copy attendance portal URL](#)

**Actions**

- [Register someone](#)
- [Email registrants](#)
- [Update account information](#)
- [Submit a feature request](#)

**Next payment from ACTIVE**

(\$100.00) (so far)  
This period: 08/01/2018 - 08/15/2018

**\$905.30**  
Last period: 07/16/2018 - 07/31/2018

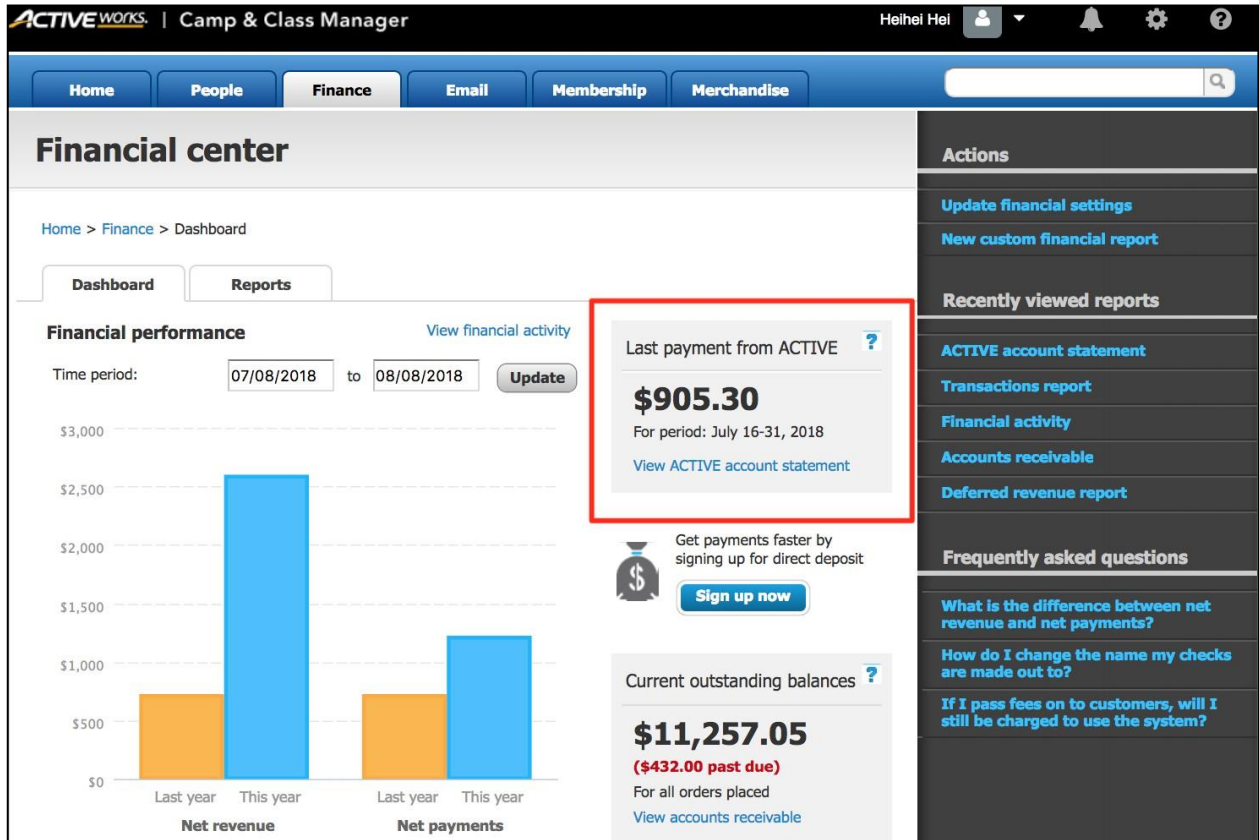
[Payment schedule](#)

[View ACTIVE account statement](#)

Last updated: 08/07/2018 6:05 PM

## Camp and Class Manager Release Notes

### Financial summary:



Under the AUI > **Finance** tab > **Last payment from ACTIVE** section, the remittance amount is now calculated with chargebacks counted as refunds.



## Camp and Class Manager Release Notes

### Order details page:

On the order detail page (AUI > **People** tab > a person > **Order history** tab > an order):

- In the **View transactions** column, chargeback transactions are now labeled as “Customer Chargeback”.
- In the **Refunds** column, the negative refund amount is displayed in red brackets.

**Order #C-5B8T7RNP27**

View other orders

View customer

Resend email

Apply discount

**Balance** **\$100.00**

Make a payment

Remaining balance \$100.00 Please pay immediately

**Current state of this order**

	Item	Total	Amount paid	Balance
Actions	Price	\$100.00	(\$0.00)	\$100.00
	Tuition			
	Price - \$100.00		(\$0.00)	\$100.00
	Total	\$100.00	(\$0.00)	\$100.00

**Transaction history for this order**

View transactions	Date/time	Payments	Refunds	Entered by
Payment - Sale View transactions	11/28/2018 2:02 PM	\$100.00	----	Camps User
Customer Chargeback View transactions	11/29/2018 11:21 AM	----	(\$100.00)	Camps User

Chargeback information is displayed under the **View transactions** link > **Refund details** section:

**Order C-5B8T7RNP27: Order history**

Return to order

11/29/2018 11:21 AM Entered by Camps User

Previous transaction

**Refund details**

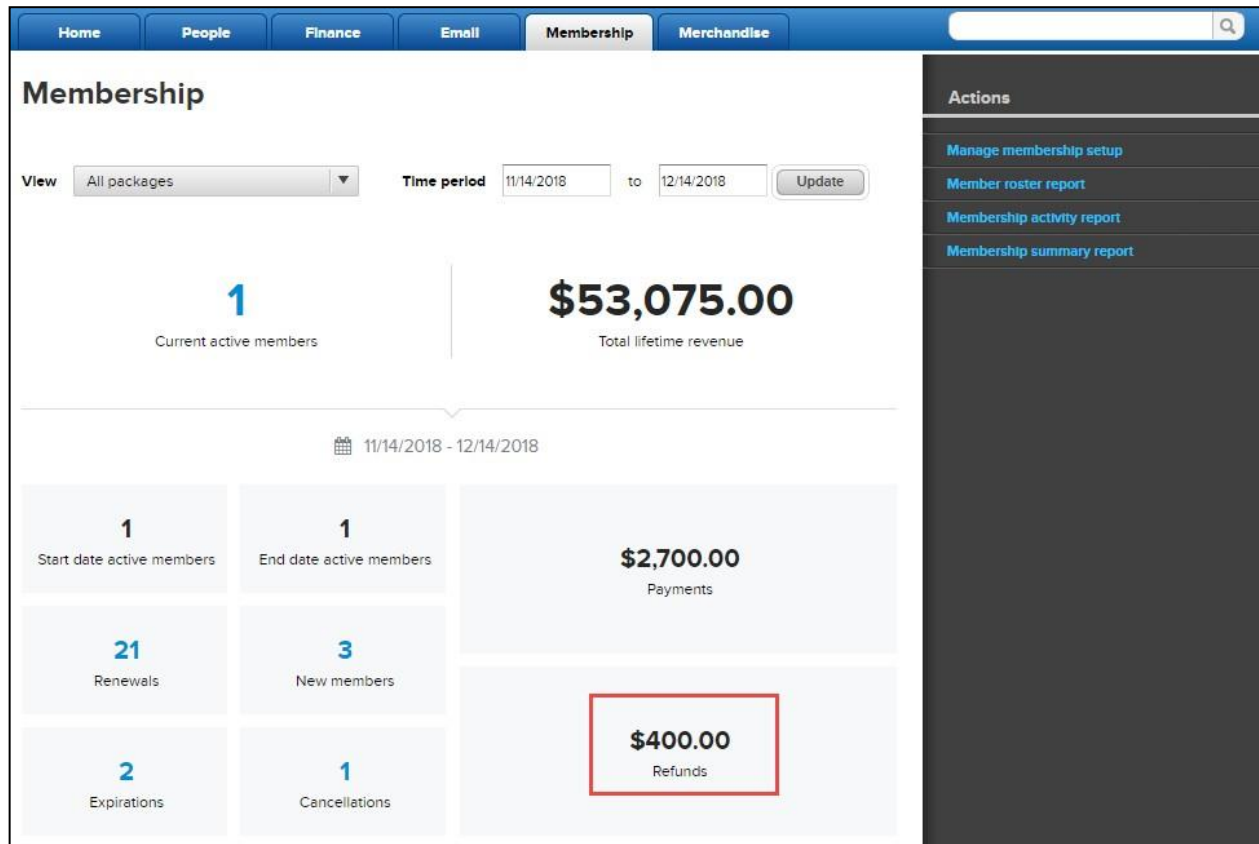
\$100.00 was refunded to Test Chargeback.

Refunded to VISA \*\*\*\*1881

### Membership homepage:

Under the AUI > **Membership** tab, the total **Refunds** amount is now calculated with chargebacks counted as refunds.

## Camp and Class Manager Release Notes



### Membership summary report:

In the AUI > **Membership** tab > **Membership summary report**, whether grouped by *Package*, or by *Package and option*, the amounts displayed in the **Refunds** column are now calculated with chargebacks counted as refunds.

**Membership**

Membership > Membership summary report

Membership summary report Share Export Package

Time period: 11/14/2018 to 12/14/2018 Update Group by: Package Showing 1 of 1

Package	Members at start	New members	Cancellations	Renewals	Expirations	Members at end	Payments	Refunds
new pack	1	3	1	21	2	1	\$2,700.00	\$400.00
	1	3	1	21	2	1	\$2,700.00	\$400.00





## Session summary report and Session type summary report:

In the AUI > Finance tab > Reports tab > **ACTIVE** account statement > Run report button > Session summary report or Session type summary report > Refunds processed through ACTIVE column, the negative amounts of chargeback transactions are displayed in brackets.

Purchases	Cancelled purchase	Discounts	Cancelled discount	Payments processed through ACTIVE	Refunds processed through ACTIVE
\$0.00	\$0.00	\$0.00	\$0.00	\$400.00	(\$200.00)
\$1,000.00	\$0.00	\$0.00	\$0.00	\$1,000.00	(\$500.00)
\$0.00	(\$254.00)	\$0.00	\$0.00	\$0.00	(\$50.00)
<b>\$1,000.00</b>	<b>(\$254.00)</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,400.00</b>	<b>(\$750.00)</b>

Purchases	Cancelled purchase	Discounts	Cancelled discount	Payments processed through ACTIVE	Refunds processed through ACTIVE
\$1,000.00	(\$254.00)	\$0.00	\$0.00	\$1,400.00	(\$750.00)
<b>\$1,000.00</b>	<b>(\$254.00)</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,400.00</b>	<b>(\$750.00)</b>

## Allocation report:

In the AUI > Finance tab > Reports tab > **ACTIVE** account statement > Run report button > **Allocation report** > Allocation Type column, chargeback transactions are now labeled as "Refund Allocation", and the negative amounts are displayed in brackets.

Transaction Date	Payment ID	Refund Payment	Payment Type	Payment Method	Allocation Type	Amount	Item Name
12/03/2018 2:09:27	#289254002		CREDIT_CARD	Visa	Initial Allocation	\$200.00	Price
12/03/2018 2:51:57	#289254002	289277301	CREDIT_CARD	Visa	Refund Allocation	(\$200.00)	Price
12/03/2018 6:11:35	#289263102		CREDIT_CARD	Visa	Initial Allocation	\$200.00	Price
12/05/2018 6:09:03	#20000000000149100		CREDIT_CARD	Visa	Initial Allocation	\$500.00	Price
12/06/2018 5:09:45	#20000000000179200		CREDIT_CARD	Visa	Initial Allocation	\$200.00	Price
12/06/2018 5:11:45	#20000000000189100		CREDIT_CARD	Visa	Initial Allocation	\$300.00	Price
12/06/2018 5:16:15	#20000000000189100	20000000000189300	CREDIT_CARD	Visa	Refund Allocation	(\$300.00)	Price
12/06/2018 5:16:16	#20000000000179200	20000000000189400	CREDIT_CARD	Visa	Refund Allocation	(\$200.00)	Price
12/06/2018 6:42:16	#283946002		CREDIT_CARD	Visa	Transfer Out	(\$10.00)	Monday
12/06/2018 6:42:16	#284499902		CREDIT_CARD	Discover	Transfer Out	(\$10.00)	10
12/06/2018 6:42:16	#284499902		CREDIT_CARD	Discover	Transfer In	\$10.00	Monday
12/06/2018 6:42:16	#284343902		CREDIT_CARD	Visa	Transfer In	\$10.00	DECLINED

## Master financial report:

In the AUI > Finance tab > Reports tab > **ACTIVE** account statement > Master financial report > transaction\_type column, chargeback transactions are now labeled as "ALLOCATION – REFUND TO CUSTOMER", and the amounts are displayed as negative numbers.

transaction_type	order_nur	session_n	season_name	date	time	amount	check_nur	location_r
CREDIT_CARD_PAYMENT_OUT	C-5B8TKY5C66K		Membership	12/10/2018	1:53:55	-105		
ALLOCATION - REFUND TO CUSTOMER	C-5B8TKY5	new pack	Membership	12/10/2018	1:53:55	-105		
SALE	C-5B8TL00	finance ta	season 1	12/10/2018	3:17:00	100		CA locatio
ALLOCATION - ORIGINAL PAYMENT	C-5B8TL00	finance ta	season 1	12/10/2018	3:17:01	100		CA locatio
REGISTRATION PROCESSING FEE - PAID BY AGENCY	C-5B8TL00	finance ta	season 1	12/10/2018	3:18:02	-4.95		CA locatio
CC PROCESSING FEE	C-5B8TL005DXL		season 1	12/10/2018	3:18:02	-3.95		
CREDIT_CARD_PAYMENT_IN	C-5B8TL005DXL		season 1	12/10/2018	3:18:02	100		
CREDIT_CARD_PAYMENT_OUT	C-5B8TL005DXL		season 1	12/10/2018	3:20:08	-100		
ALLOCATION - REFUND TO CUSTOMER	C-5B8TL00	finance ta	season 1	12/10/2018	3:20:08	-100		CA locatio
CREDIT_CARD_PAYMENT_OUT	C-5B8TK1C	V5BX	merchandise	12/10/2018	7:47:45	-45		
ALLOCATION - REFUND TO CUSTOMER	C-5B8TK1C	session a	merchandise	12/10/2018	7:47:45	-45		CA locatio
SALE	C-5B8TL0S	chargebac	chargeback season	12/11/2018	1:21:47	100		CA locatio
ALLOCATION - ORIGINAL PAYMENT	C-5B8TL0S	chargebac	chargeback season	12/11/2018	1:21:47	100		CA locatio
REGISTRATION PROCESSING FEE - PAID BY AGENCY	C-5B8TL0S	chargebac	chargeback season	12/11/2018	1:22:54	-4.95		CA locatio
CC PROCESSING FEE	C-5B8TL0S0FMY		chargeback season	12/11/2018	1:22:54	-3.95		
CREDIT_CARD_PAYMENT_IN	C-5B8TL0S0FMY		chargeback season	12/11/2018	1:22:54	100		
CREDIT_CARD_PAYMENT_OUT	C-5B8TDYBGZ8W		Camps2292412	12/11/2018	1:38:04	-20		
ALLOCATION - REFUND TO CUSTOMER	C-5B8TDYI	SessionA1	Camps2292412	12/11/2018	1:38:04	-20		Location0
CREDIT_CARD_PAYMENT_OUT	C-5B8TL0S0FMY		chargeback season	12/11/2018	2:07:33	-100		
ALLOCATION - REFUND TO CUSTOMER	C-5B8TL0S	chargebac	chargeback season	12/11/2018	2:07:33	-100		CA locatio

# Camp and Class Manager Release Notes

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