



Camp & Class Manager 12.4 Release Notes

Release Date	Tuesday, Mar. 29 th , 2022
Release Overview	Automated waitlist management
Market/Strategic Goals	Product milestones and usability enhancements
Target Customers	Lite and Plus Customers

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New features

Automated waitlist management

Once enabled for a season/session, when a spot becomes available for a tuition with a waitlist, an email invitation will be automatically sent to the first registrant on the waitlist. The registrant will be given a customized length of time to either accept the invitation and complete their registration with payment or decline the invitation and remove themselves from the waitlist.

After either the registrant declines or the invitation expires, a new invitation will be automatically sent to the next registrant on the waitlist for the open spot.

Customize invitation rules

If **Automated waitlist management** is enabled for an agency, then agency users can set up waitlist automation rules in the season setup workflow > **Waitlist automation** step:

Step 8: Waitlist automation

Set up the waitlist automation rule when there are openings for sessions.

Waitlist automation

Allow automatically sending registration invitations to registrants who are on the waitlist when the lesson is available.

Customize invitation rules

For designated sessions, invitations will be sent by customized rules

Invitation expires in hour(s) after the invitation emails are sent

Stop sending invitations to waitlisted registrants day(s) before registration closes

Session applicability ☐ None ☐ All sessions ☒ Selected sessions

1 selected [Edit](#)

Waitlist invitation email

Customize the email registrants automatically receive after there are opening for sessions.

From: SattvicRetreats (noreply@active.com)

Subject: (Participant)'s registration invitation for (Session name)

[Customize header](#)

Status: Active

[See a preview](#)

Settings

- Season
- Sessions
- Deposits and payment plans
- Discounts
- Look and feel
- Registration forms
- Confirmation email
- Waitlist automation**
- 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?

Agency users can customize:

- The invitation email expiration time (whole hours only; defaults to 24 hours and can be set to a maximum of 72 hours) after invitation emails have been sent to registrants.
 - Once the invitation expires, the registrant will be removed from the waitlist and will no longer be able to register through the invitation link. If there is still an available spot remaining, then an invitation will automatically be emailed to the next registrant on the waitlist.
- The number of days (whole days only; defaults to 3 days and can be set to a maximum of 60 days) before the registration close date to stop sending invitation emails.
- Sessions to which the automatic invitation rules apply. To set the **Session applicability**, select one of the following:

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- **None** – do not send any invitations.
- **All sessions** – including all new sessions created in the future.
- **Selected sessions** – apply invitation rules to only the selected sessions. Agency users can click **Edit** to:
 - Select one or more sessions.
 - Change the display order by clicking the **Name**, **Date** or **Location** column header.
 - Select all sessions which will change the **Session applicability** to **All sessions**, and will also apply the invitation rules to all new sessions created in the future.

Waitlist invitation email

In the **Waitlist invitation email** section, agency users can see a preview of the invitation email that will be automatically sent to waitlist registrants when a spot for their tuition/session becomes available (each waitlist registrant will only be sent a single invitation email).

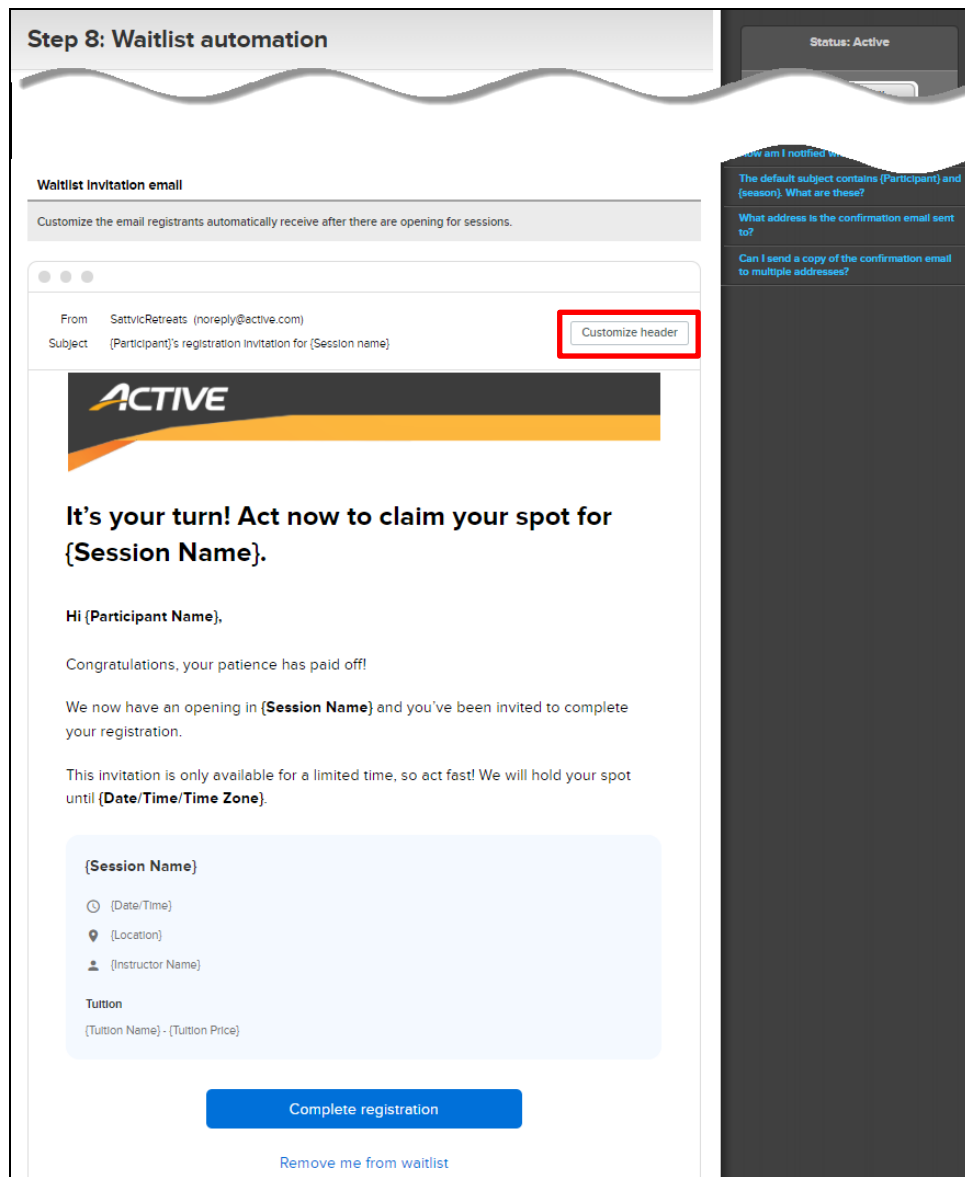
Each invitation email contains the following information:

- Name of the invited participant
- Session name
- Session date and times
- Session location
- Session instructor name (if applicable)
- Tuition name and tuition price
- Date and time of when this invitation will expire (displayed in the agency's local time zone)

Each invitation email sent to a waitlist registrant is saved in the participant's profile (**People > Email history**).

To customize the invitation header, click **Customize header**:

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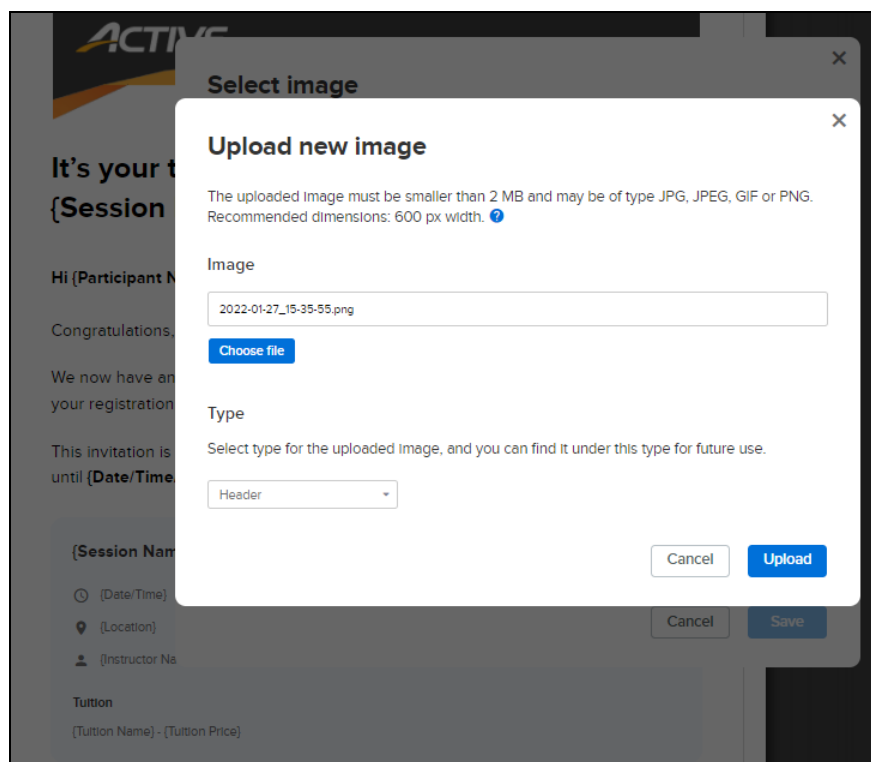
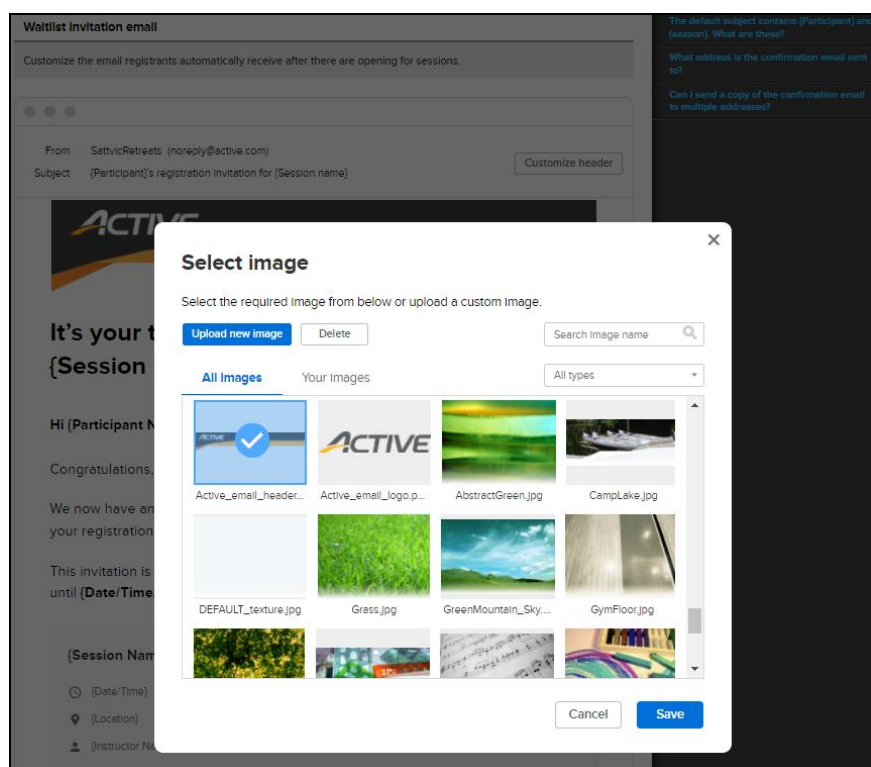


Agency users can then customize an image in the invitation email by:

- Choosing an existing image under the **All images** or **Your images** tab.
- Uploading a new image by clicking **Upload new image**.
*Note: when uploading a new image (for future use), agency users must select a type for the uploaded image, for example, **Header, Merchandise, Background, Logo** or **Footer**, so that they can find this image in future under this type. The default header image is the ACTIVE logo.*

A preview of the image is then displayed.

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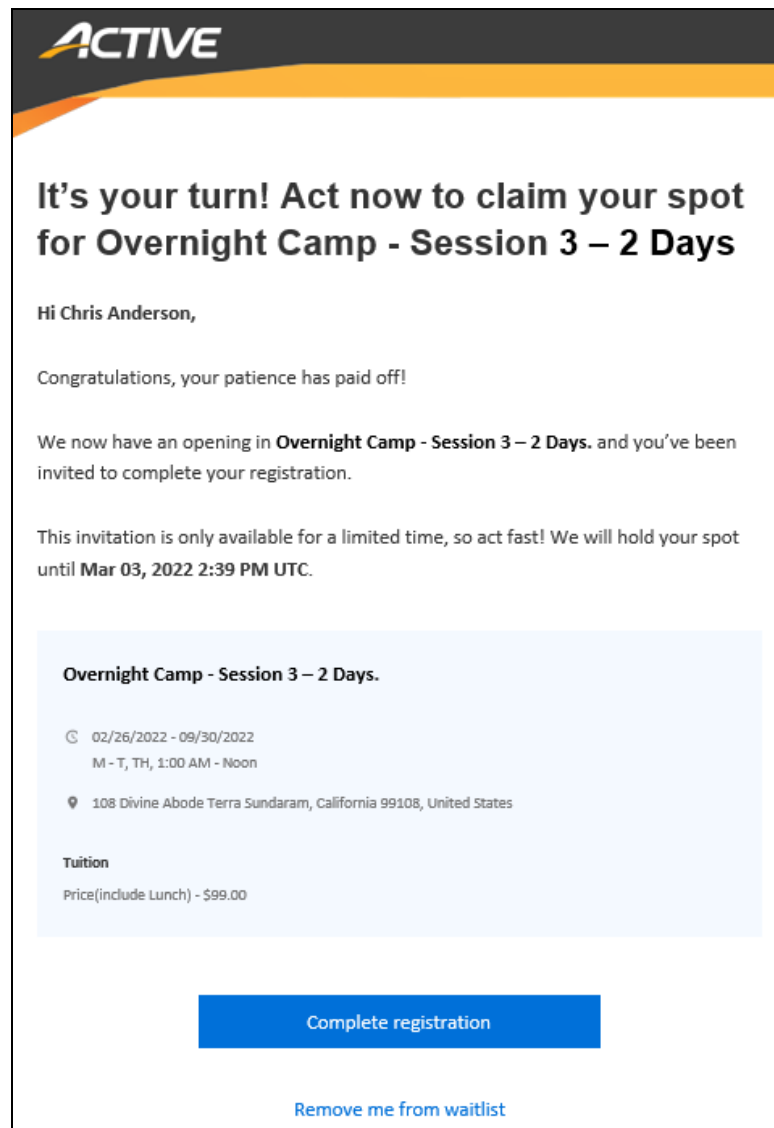


Waitlist registrants complete registration via invitation email

When waitlist registrants receive the invitation email, they can either:

- Complete their registration by clicking the **Complete registration** button, which will otherwise expire after the time limit configured in [Customize invitation rules](#).
- Give up their spot immediately and permanently remove themselves from the waitlist by clicking the **Remove me from waitlist** link.

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After clicking the **Complete registration** button, the registrant will be requested to sign into their account and then taken directly to a checkout page where any required payments for this session will be collected.

- Payments can be made by credit card or using the available credit balance in their account.
- If any deposits or payment plans are available for the session, then they will be displayed for the registrant to select.
- Once the payment is complete, the registrant will see a registration confirmation page.

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Complete registration

Order review

Waitlisted

WAITLIST - SessionA - TuitionA1

09/27/2017 - 12/20/2041

Kirkland

AutoFIArzt/NF AutoLIArzt/NF

\$0.00

Registered

SessionA - TuitionA1

09/27/2017 - 12/20/2041

Kirkland

AutoFIArzt/NF AutoLIArzt/NF

\$100.00

YOUR ORDER

Subtotal	\$100.00
Processing fee	\$0.00
Total	\$100.00
Amount due	\$100.00

Pay now

Coupon

Apply a coupon before you enter other information.

Apply

Payment options

☐ Pay in full

\$100.00

☒ Pay deposit

Enroll in payment plan

SessionA - TuitionA1

\$20.00

Amount due now

Choose payment plan

2 installments

10/15/2040

12/10/2040

Select billing option

Bill me automatically

Payment information

We accept the following card types:

VISA

MasterCard

Discover

Amex

Apple Pay

Name on card *

After paying for the registration, confirmation and receipt emails will be sent to the registrant.

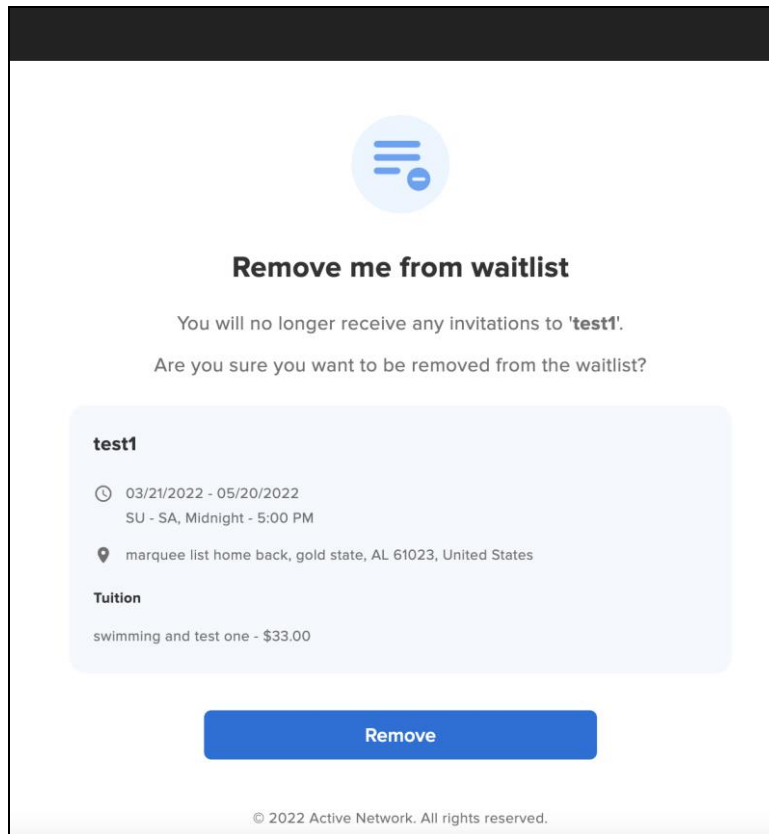
If a registrant attempts to accept an invitation after it has expired, then they will see the following page:

Invitation expired

The invitation you are trying to complete a registration for has now expired.

If a registrant clicks the **Remove me from waitlist** link, then they will see the following page:

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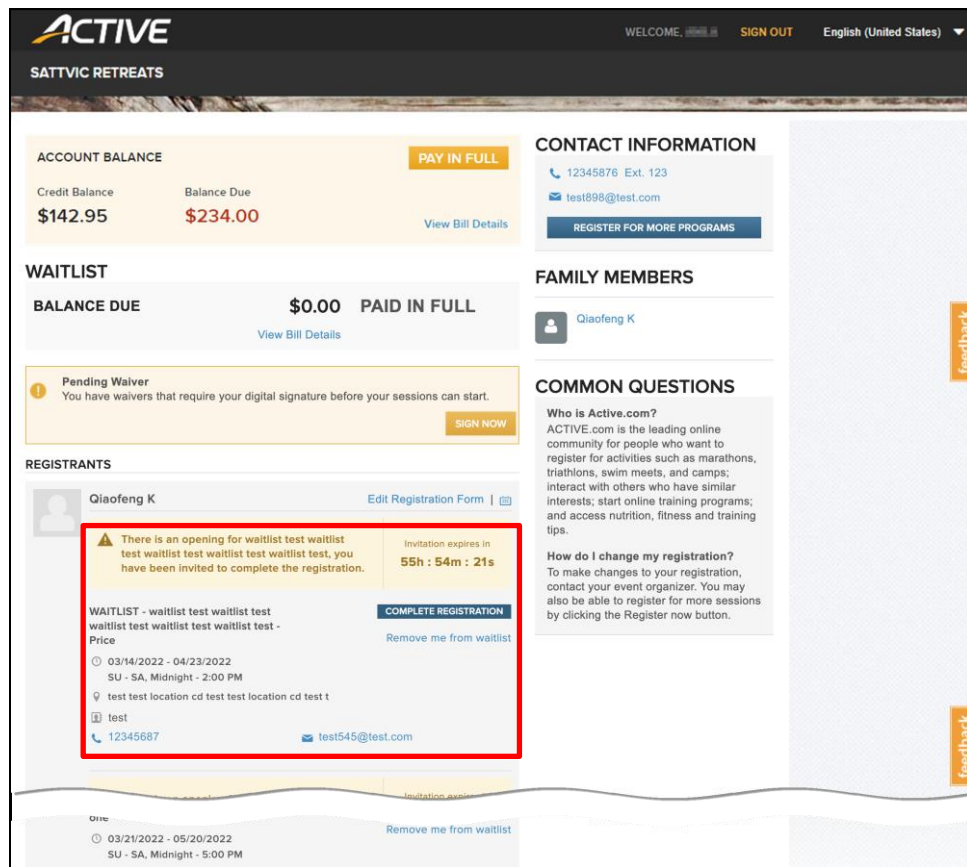


Waitlist registrants complete registration via the SSUI

The registrants' SSUI page displays invitations to waitlisted sessions and corresponding countdown times. Registrants can either:

- Complete their registration by clicking the **Complete Registration** button, which will otherwise expire after the time limit configured in [Customize invitation rules](#).
- Give up their spot immediately and permanently remove themselves from the waitlist by clicking the **Remove me from waitlist** link.

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View and manage waitlists

When using Automated Waitlists, a new **Waitlist** tab will be available in the season for viewing the remaining waitlist registrants.

On the season home page > **Waitlist** tab, agency users can:

- Search for a waitlist registrant by participant name or parent name.
- Filter displayed waitlist registrants by sessions or tuitions.
- Manually move a registrant to the top of the waitlist for their tuition by clicking the corresponding **T** icon.


Teresa's school						
View another season						
Home > Teresa's school > Waitlist						
Dashboard	Sessions	Coupons	Reports	Supplemental forms	Group assignments	Waitlist
Waitlist						
Export report Search						
Session	MS Office	Tuition	All tuitions	Showing 6 of 6		
Order number	Registration date	Participant	Date of birth	Primary parent	Waitlist ranking	Prioritization
Waitlist - MS Office - Beginner (2)						
C-76X5P3W13V3	09/02/2021 8:35 PM				3	
C-76X5N56WCD3	06/15/2021 2:16 AM				4	
Waitlist - MS Office - Advance (4)						
C-76X5N56WCD3	06/15/2021 2:16 AM				1	
C-76X5N56WCD3	06/15/2021 2:16 AM				2	
C-76X5N51KB8G	06/15/2021 1:45 AM			Anila Green	5	
C-76X5Q2TJPSY	03/16/2022 8:14 PM			Anila Green	6	


Waitlist rankings

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- Registrants are displayed in groups based on the specific tuition in which they are waitlisted (displayed as *Waitlist - Session Name – Tuition Name*) and are listed by rank in the waitlist for this specific tuition. This rank is based on the time at which each participant joined the waitlist.
- The **Waitlist ranking** column displays each registrant's waitlist rank for the overall session.
- Although participants always register for specific tuitions when joining a waitlist, both ranking views are included to provide clarity for agencies using any combination of capacity settings (session-level, tuition-level or both).

Manually adjust rankings

When a registrant is moved to the top of the waitlist by clicking the  icon, they will be moved to the top of the waitlist for both the tuition and the session.

- The registrant will be listed at the top of their tuition group, and their session rank will be changed to **1**. When an opening becomes available for their session and/or tuition (or when a pending invitation is declined/expires), this registrant will be the first to receive an invitation to accept the spot.
- If another registrant in the same session/tuition is later moved to the top of the waitlist by clicking the  icon, then the previous top registrant will be moved down one spot in the session rank to **2** if they have not yet received an invitation.

Export waitlist report

Agency users can export the waitlist information to an Excel file by clicking the **Export report** button:

Waitlist - MS Office - Beginner					
Order number	Registration date	Participant	Date of birth	Primary parent	Offer status
C-76X5N56WCD3	06/15/2021 2:16 AM	[REDACTED]	[REDACTED]		Not invited
C-76X5P3W13V3	09/02/2021 8:35 PM	[REDACTED]	[REDACTED]		Not invited
Count: 2					
Waitlist - MS Office - Advance					
Order number	Registration date	Participant	Date of birth	Primary parent	Offer status
C-76X5N51KB8G	06/15/2021 1:45 AM	[REDACTED]	[REDACTED]	Anila Green	Not invited
C-76X5N56WCD3	06/15/2021 2:16 AM	[REDACTED]	[REDACTED]		Not invited
C-76X5N56WCD3	06/15/2021 2:16 AM	[REDACTED]	[REDACTED]		Not invited
C-76X5QZTJPSY	03/16/2022 8:14 PM	[REDACTED]	[REDACTED]	Anila Green	Not invited
Count: 4					

The exported report includes an expanded list of each registrant who has been on the waitlist and their current offer status, including:

- **Not invited:** The waitlist registrant is in the waitlist queue.
- **Cancelled:** If an agency user cancels a waitlist registration before an invitation is emailed to the registrant, then this waitlist registrant will NOT be emailed an invitation.
- **Invited:** The waitlist registrant has been emailed an invitation but has not yet completed the registration.
- **Accepted:** The waitlist registrant has been emailed an invitation and has completed the registration.
- **Declined:** The waitlist registrant has received the invitation and has declined the registration.
- **Expired:** The waitlist registrant has been emailed an invitation but did not complete or decline the registration before the invitation expired.