



Camp & Class Manager 14.5 Release Notes

Release Date	Wednesday, July 31, 2024
Release Overview	Self-Transfer: Overview and Set-Up SSUI Registrant Workflow
Market/Strategic Goals	Product milestones and usability enhancements
Target Customers	Lite and Plus Customers

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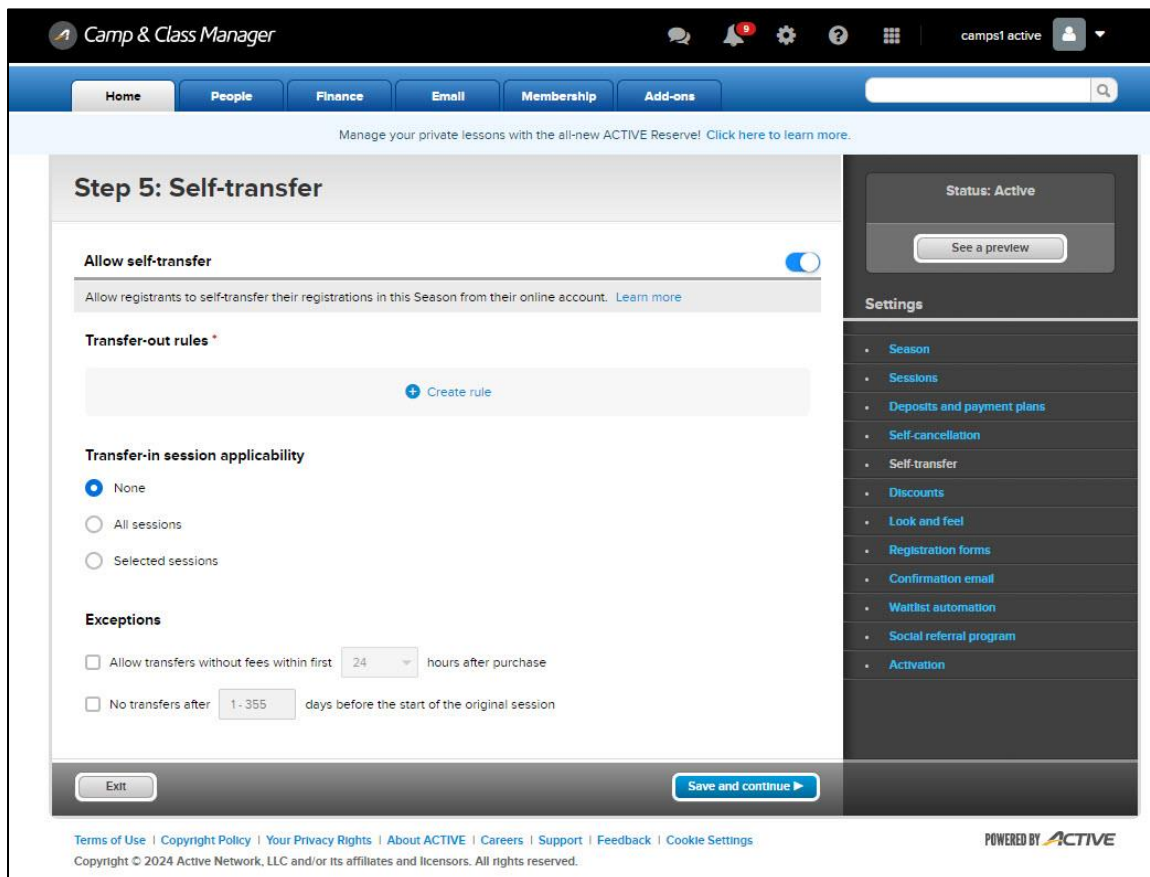
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Self-Transfer: Overview and Set-Up

Camp & Class Manager can now be configured to allow consumers to transfer their registration from one Session to another from within their online accounts (SSUI).

This feature provides agency users with the ability to create transfer rules that can be used to align what is allowed in the system with the organization's own transfer policy. These rules dictate which Sessions can be transferred in or out of, what transfer fees to charge, and what time frame to allow transfers within.

In the AUI, agency users can enable self-transfers for a season by switching on the **Home** tab > **Seasons** > a season > **Setup** link > **Settings** menu > **Self-transfer** > **Allow self-transfer** switch (disabled by default):



On the Self-Transfer set-up page, there are three areas for configuring Self-Transfer restrictions.

- **Transfer-Out Rules** define what date range to allow self-transfer during, and what transfer fees to charge during this window of time. A rule can be applied to all Sessions in a Season, or can be applied to selected Sessions only.
 - If an organization charges differing transfer fees based on program type within the same Season, separate Transfer-Out Rules can be created and assigned to the applicable group of Sessions.
 - If the amount an organization charges in transfer fees for a program varies based on the date of transfer, multiple tiers can be created within a single rule to support this.

For example, 1/1/2025-03/01/2025 may charge a 10% transfer fee, and 03/02/2025-05/01/2025 charges a 25% transfer fee. This can be set-up as two tiers within a single rule.

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- **Transfer-Out Session Applicability** defines which Sessions the Transfer-Out Rule being created applies to.
- **Transfer-In Session Applicability** defines which Sessions are eligible for applicable registrants to be able to transfer into.
- **Exceptions** are optional to use. These settings define any additional criteria that override the existing rule set-up.
 - Allow transfers without fees within first [24/48] hours after purchase.
 - Don't allow transfers [X] days before the start of the original Session the participant is registered for.

To configure these self-transfer restrictions for the season, agency users can:

1. Create a transfer-out eligibility rule by clicking **Create rule** (up to 20 transfer-out eligibility rules can be created) and then:
 - Configure a date range for this rule during which registrants can transfer their registrations.
 - Configure a **Transfer fee** amount and **Fee type (Flat Dollar Amount or Percentage)** to charge on the transfer-out registration. If **Percentage** is selected, then the transfer fee = Total amount of the original registration * Transfer fee Percentage.
 - If needed, configure additional date range and **Transfer fee** tiers within this rule by clicking **Create tier** (up to 20 transfer-out eligibility tiers can be created), for example, to charge more for transfers as the date approaches the season start date.

Create rule

Registrants can self-transfer date range *	Transfer fee	Fee type
01/01/2025 - 03/01/2025	10	Percentage
03/02/2025 - 05/01/2025	25	Percentage

+ Create tier

Transfer-out session applicability

All sessions

Selected sessions



1 selected [Edit](#)

Cancel Save

- Discounts
- Look and feel
- Registration forms
- Confirmation email
- Waitlist automation
- Social referral program
- Activation

- Select the transfer-out sessions to which this rule applies by selecting **Transfer-out session applicability** > **All sessions** or **Selected sessions** and then clicking **Edit** to select the required sessions:

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- Save the rule by clicking the **Save** button.
- After creating the rule, agency users can optionally:
 - Create another transfer-out eligibility rule by clicking **Create rule**. (**Note:** Each session can only be associated with one rule; once all sessions are associated with rules, no additional rules can be created).
 - View transfer-out sessions associated with a rule, click **View**.
 - Edit a rule by clicking the corresponding  icon.
 - Delete a rule by clicking the corresponding  icon.

2. Select the eligible transfer-in sessions from **Transfer-in session applicability** > **None**, **All sessions** or **Selected sessions** and then clicking **Edit** to select the required sessions:

Please note that of the Sessions selected in this step, registrants can only view and select Sessions within the Self-Transfer flow that are open for registration, are set to *Session Display Status: Online*, and have spots available.

3. Configure **Exceptions** for self-transfers [unchecked by default]:
 - **Allow transfers without fees within first [24 or 48] hours after purchase**
 - **No transfers after [] days before the start of the original session**

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Exceptions

Allow transfers without fees within first hours after purchase

No transfers after days to days to of the original session

If time conflicted, it will override all the other rules.

SSUI Registrant Workflow

Based on the rules defined by the organization within Self-Transfer set-up, applicable participants can see the option to transfer their registration to a different Session within their online accounts (SSUI). This new workflow allows registrants to select the Session and Tuition they want to transfer into, make add-on selections, complete any registration form updates, sign waivers for the new Sessions, and then check out for any necessary payments or refunds.

In the SSUI, to self-transfer the session, a registrant who registered for an eligible session can:

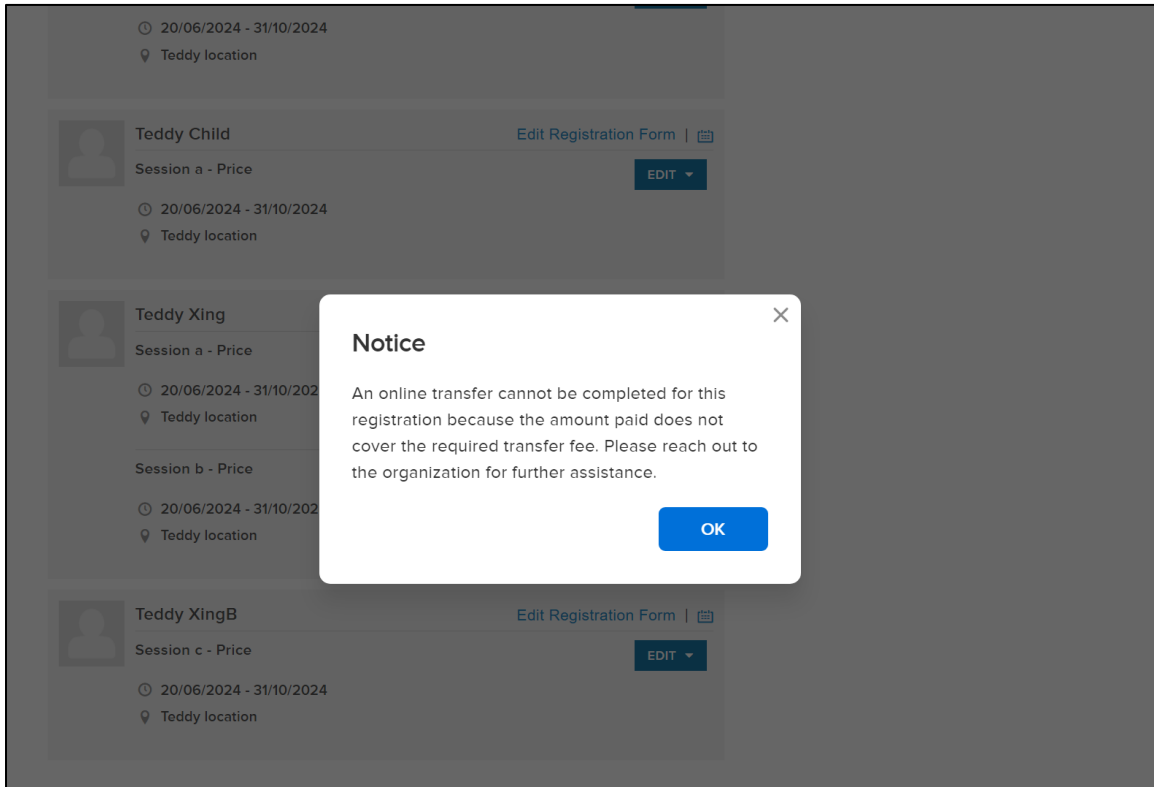
1. Select the transfer-out session by navigating to the SSUI homepage > **Current & Upcoming** tab > identify the session they want to transfer out of > **EDIT** button > **Transfer** link:

The screenshot displays the user account interface for Molly Jones. At the top, it says 'CAMPS NEW TEST' and 'WELCOME, MOLLY'. The account balance is shown as \$0.00 credit and \$0.00 due. Contact information includes the phone number 877-339-2783 and email crystal.tan@active.com. The '2024 MONT SEASON' section shows a balance due of \$0.00, which is 'PAID IN FULL'. Under 'REGISTRANTS', Molly Jones is listed with two sessions. The first session is 'session 1 - Price' for '07/08/2024 - 07/31/2024' at 'West Climbing Club'. It includes session options like 'lunch x 1' and merchandise 'merchandise 4 x 1'. There are 'EDIT', 'Add purchase', and 'Transfer' buttons for this session. The second session is 'session 1 - Tuition' for the same dates and location, also with 'EDIT' and 'Transfer' buttons. A 'COMMON QUESTIONS' section on the right provides instructions on how to cancel registration and how to transfer it.

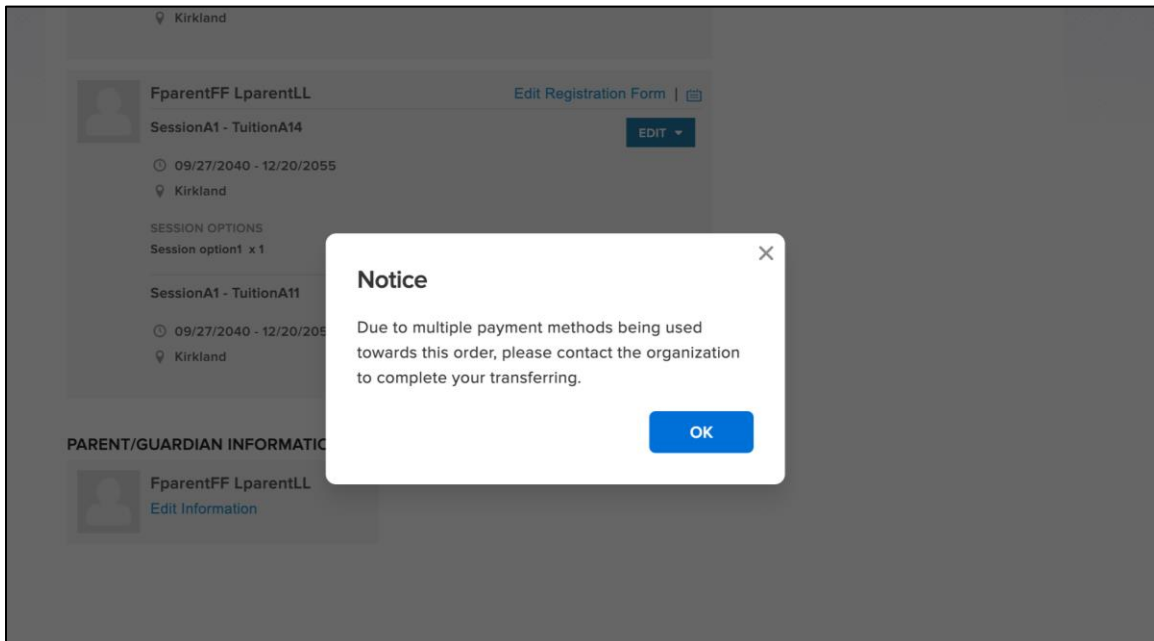
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After clicking the **Transfer** link, the following conditions may occur:

- If the registrant has not paid enough of their balance to cover the transfer fee:



- If payments have been made offline or by multiple payment methods:



Note: The **Transfer** link is enabled only when the following conditions are met:

- The season-level **Allow self-transfer** toggle in the AUI is ON.

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- The selected Session is eligible for self-transfer as defined by the transfer-out rules for the Season and is within the configured date ranges for the applicable rule.
 - The registration is not on a waitlist and has no chargebacks.
 - The session dates are either current or in the future.
2. On the **Transfer registration** page, the registrant is shown a list of eligible sessions to transfer into. The table displays session details to help registrants find the program they are interested in, including:
- Start and end dates
 - Session times and days of the week
 - Any grade, age, and/or gender restrictions
 - Price or price range for the Tuitions in the Session
 - The Session location, with the ability to click for a map view and address details
 - The Session description is displayed in the popup window when a Session name is selected

Registrants can scroll through the table or search for a Session via the **Search by session name** box, and then click the hyperlinked Session name:

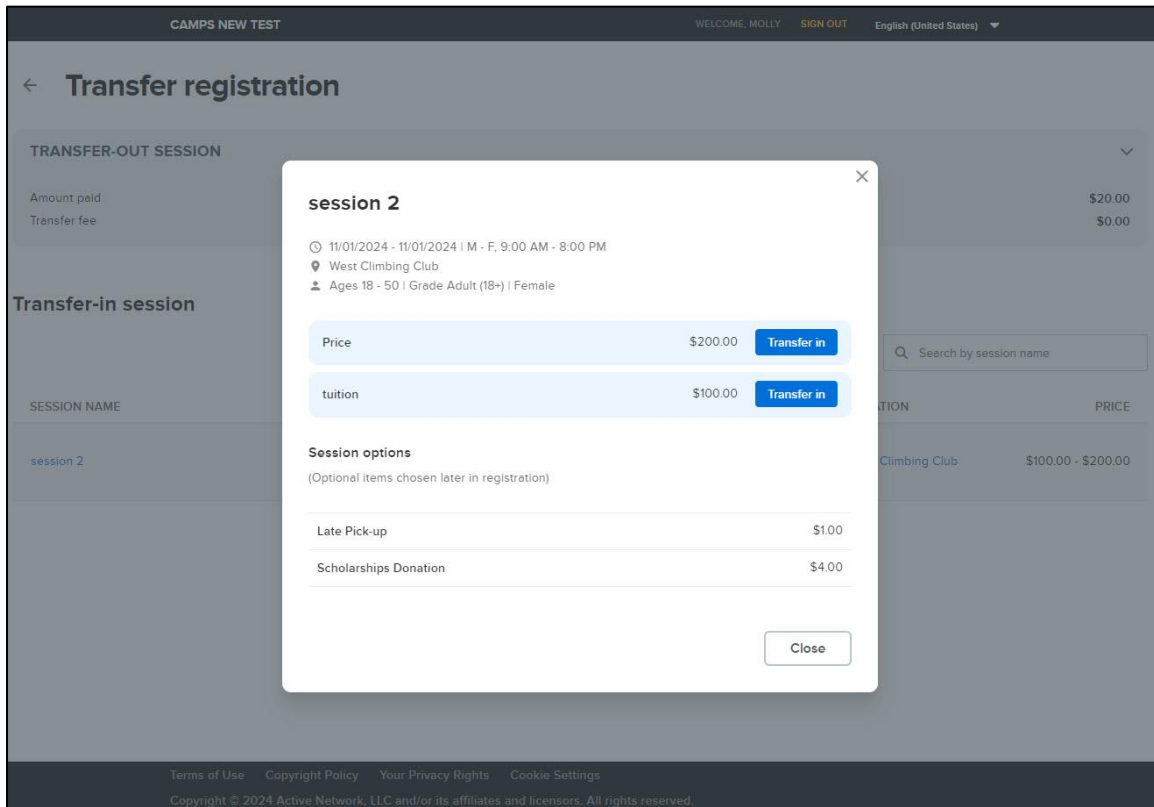
The screenshot shows the 'Transfer registration' page. At the top, there is a navigation bar with 'CAMPS NEW TEST', 'WELCOME, MOLLY', 'SIGN OUT', and 'English (United States)'. Below the navigation bar, the page title is 'Transfer registration'. Underneath, there is a section for 'TRANSFER-OUT SESSION' with a dropdown arrow. It shows 'Amount paid' as \$20.00 and 'Transfer fee' as \$0.00. Below this is the 'Transfer-in session' section, which includes a search box labeled 'Search by session name'. A table lists the available sessions:

SESSION NAME	DATE RANGE	SCHEDULE	RESTRICTIONS	LOCATION	PRICE
session 2	11/01/2024 - 11/01/2024	M - F, 9:00 AM - 8:00 PM	Ages 18 - 50, Grade Adult (18+), Female	West Climbing Club	\$100.00 - \$200.00

At the bottom of the page, there are links for 'Terms of Use', 'Copyright Policy', 'Your Privacy Rights', and 'Cookie Settings', along with a copyright notice: 'Copyright © 2024 Active Network, LLC and/or its affiliates and licensors. All rights reserved.'

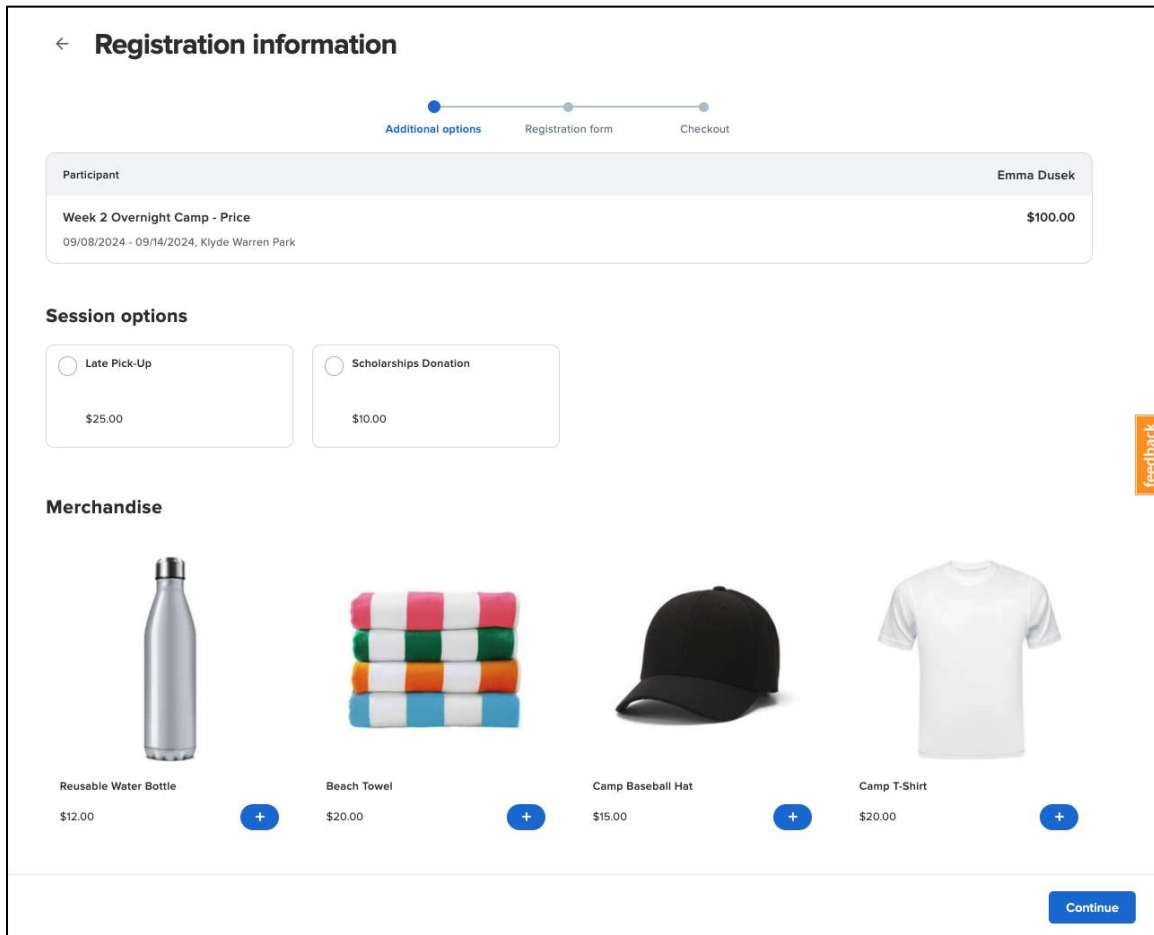
3. The Session details popup shows the Tuitions that are available in this Session, where the registrant can select **Transfer in** next to the Tuition of their choosing:

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4. After Session selection, the registrant can review available add-ons and select items to add to their cart with the new registration, then click the **Continue** button.
 - Prechecked or prechecked and required add-ons are displayed and selected accordingly on this page.
 - Clicking a merchandise item opens a pop-up view displaying associated images and variant options to select from.
 - Please note that Session Options configured as *auto-apply to cart* are not supported for transfer-in Sessions in this release.

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5. The Participant Information page is prefilled with saved answers for questions answered previously by this registrant. The registrant can review their registration form and answer any outstanding questions or modify answers for this registration:

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CAMPS NEW TEST WELCOME, MOLLY SIGN OUT English (United States)

← Registration information

Additional options Registration form Checkout

Participant Information

Name *
Molly Jones

Gender *
 Male
 Female

Date of birth *
Jul 4 2000

Email address *
Molly@123.com

Home phone number *
01085541227

Country *
United States

Address *
3rd North 75 3rd Ave

Address line 2

City *
New York

State *
New York

ZIP *
10003

Waivers and agreements

Please read the following waivers and agreements carefully.

I agree to the [Active Agreement and Waiver](#)

6. On the **Waivers and agreements** section, the registrant must sign required waivers for the transfer-in Session before clicking the **Continue** button:

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Waivers and agreements

Please read the following waivers and agreements carefully.

I agree to the [Active Agreement and Waiver](#)

Digital signature

Write your signature

By signing my name below, I acknowledge that I have read and agree to all the waivers and agreements that I have selected above.

Mary Jones

Type your signature

Clear

Back Continue

feedback

7. On the **Checkout** page, the registrant can review the pending changes to their order.
- The cart view displays the items within this order that have been removed, added, or modified as part of this transfer and any applicable transfer fees.
 - If the Session transfer impacts eligibility for automated discounts (e.g. multi-session or multi-person discounts), discounts applied will automatically update at this step
 - Please note: Internal discounts configured to trigger by a specific answer to a registration form question are not supported for transfer-in Sessions with this release.
 - The Order Summary displayed in the upper right of the screen includes:
 - **Transfer Out** amount
 - **Transfer In** amount
 - **Processing Fee** amount (if applicable)
 - **Remaining Balance:** [outstanding balance resulted from previous purchase]
 - **Total**

When reviewing any applicable fee changes, if the **Total** is greater than \$0, there is a balance due for the updated order.

- If the transfer-out Session was on an existing payment plan with remaining installment dates, this payment plan is available to inherit for the new transfer-in Session. In this case, the registrant can select between **Payment Plan** or **Pay in Full** for the outstanding balance.
- When **Payment Plan** is selected, the remaining installment dates are displayed for review.
- When **Pay in Full** is selected, the registrant can select a card saved on file, enter new credit card information for payment, or apply available credit balances from their account.

Note:

- The registration must be purchased by a single online payment method (credit card, credit balance, or electronic check).
- If the coupon applied to the transfer-out session is still valid, it can be applied to the transfer-in session. If the coupon is out of date, or invalid, it will not be displayed and cannot be applied to the transfer-in session.

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← Checkout

Transferred items

ITEM	
Transfer out	SUBTOTAL
session 1 - Tuition	-\$15.00
<small>07/08/2024 - 07/31/2024 West Climbing Club Participant: Molly Jones</small>	
Transfer fee	\$2.00
lunch	1 x -\$5.00
Transfer in	
session 2 - tuition	\$100.00
<small>11/01/2024 - 11/01/2024 M - F 9:00 AM - 8:00 PM West Climbing Club Participant: Molly Jones</small>	

Order summary

Transfer out	-\$10.00
Transfer in	\$100.00
Processing fee	\$1.00
Total	\$83.00

Confirm

Cancel

Payment option

Pay in full \$83.00

Payment Information

Please choose a credit card:

**** 4113 07/2031

**** 5454 04/2030

Add a new credit card

Billing address

First name * Last name *

Email *

Phone number *

When reviewing any applicable fee changes, if the **Total** is less than \$0, there is a refund due for the updated order. Under **Refund To**, the registrant can select to receive their refund by original online payment (e-check or credit card) or to receive the refund as a credit balance on their account, then click **Confirm** to submit the order updates.

Please note that if there are other registrations within this order that have an outstanding balance, any refund from the transfer-out Session will be applied towards the order balance before a refund is offered to the registrant.

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Checkout

Transferred items

ITEM	SUBTOTAL
Transfer out	
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"> - </div> <div> <p>session 2 - tuition</p> <p>📅 11/01/2024 - 11/01/2024</p> <p>📍 West Climbing Club</p> <p>Participant: Molly Jones</p> </div> </div>	-\$100.00
Processing fee - session 2 - tuition	-\$1.00
Transfer fee	\$2.00
Transfer in	
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"> + </div> <div> <p>Session 5 - Price</p> <p>📅 07/09/2024 - 08/31/2024 Su, Sa</p> <p>📍 West Climbing Club</p> <p>Participant: Molly Jones</p> </div> </div>	\$50.00

Order summary

Transfer out	-\$99.00
Transfer in	\$50.00
Processing fee	\$1.00
Total	-\$48.00

Confirm

Cancel

Refund to

Credit balance

**** 4113 Original payment method

When reviewing any applicable fee changes, if the **Total** equals \$0, the registrant can click the **Confirm** button to submit their order changes:

←

Checkout

Transferred items

ITEM	SUBTOTAL
Transfer out	
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"> - </div> <div> <p>session 2 - tuition</p> <p>📅 11/01/2024 - 11/01/2024</p> <p>📍 West Climbing Club</p> <p>Participant: Molly Jones</p> </div> </div>	-\$100.00
Processing fee - session 2 - tuition	-\$1.00
Transfer fee	\$2.00
Transfer in	
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"> + </div> <div> <p>Session 5 - Price</p> <p>📅 07/09/2024 - 08/31/2024 Su, Sa</p> <p>📍 West Climbing Club</p> <p>Participant: Molly Jones</p> </div> </div>	\$50.00
Sports Bottle	1 x \$48.00

Order summary

Transfer out	-\$99.00
Transfer in	\$98.00
Processing fee	\$1.00
Total	\$0.00

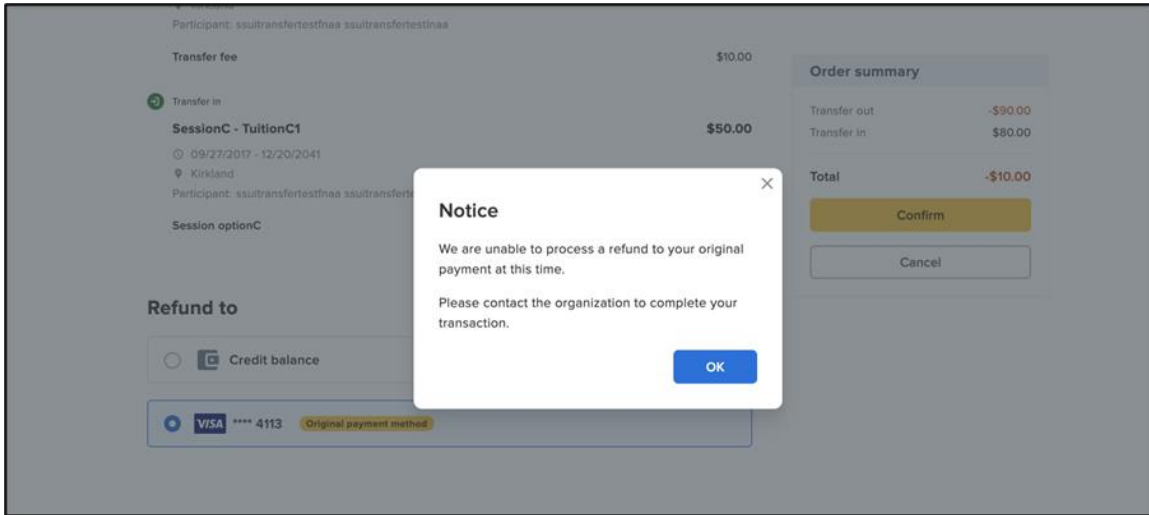
Confirm

Cancel

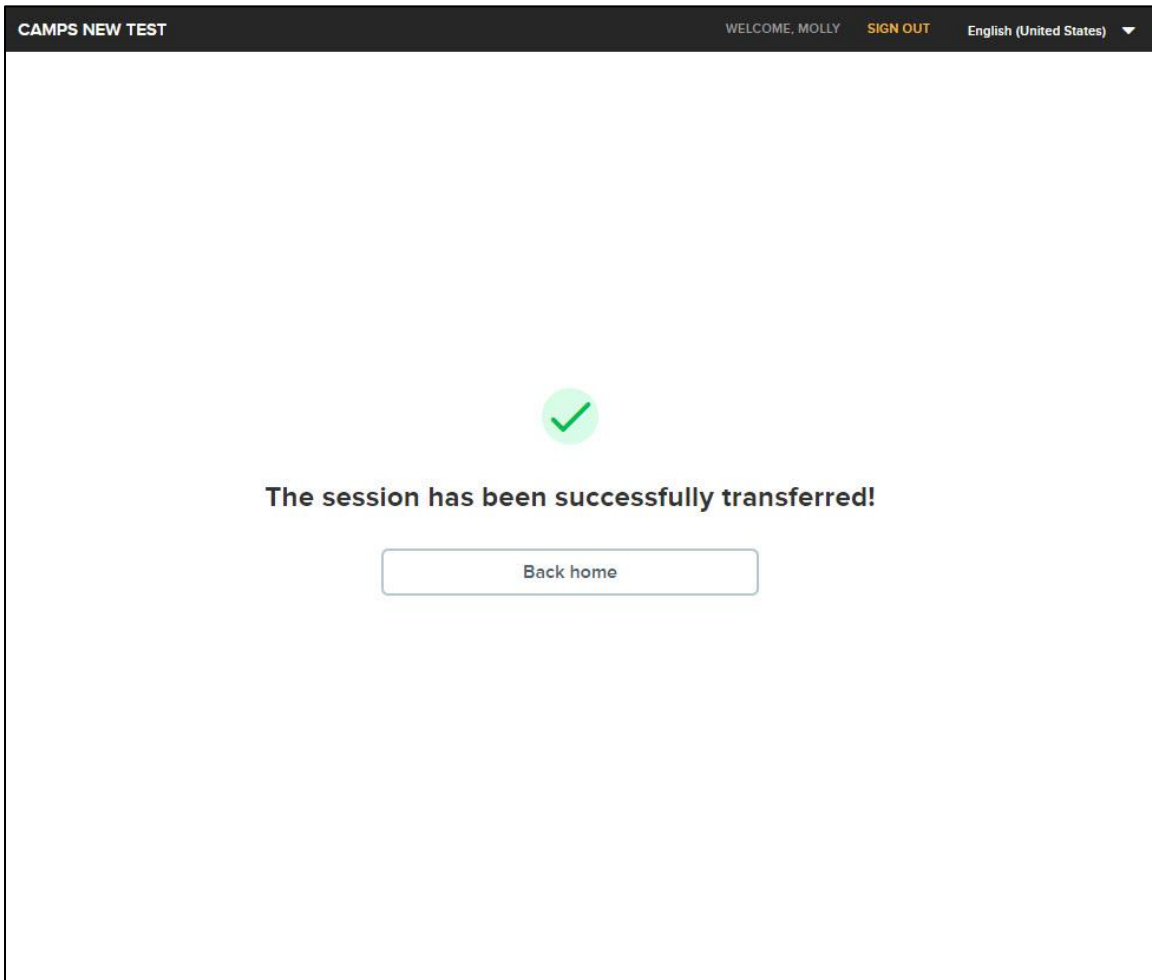
If the organization does not have sufficient funds in their remittance to cover a refund, the popup below will appear:

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8. Click **Back home** to redirect to the SSUI homepage:



The registrant can receive a confirmation email along with the receipt.