

Release Notes 6.16
December 5, 2016

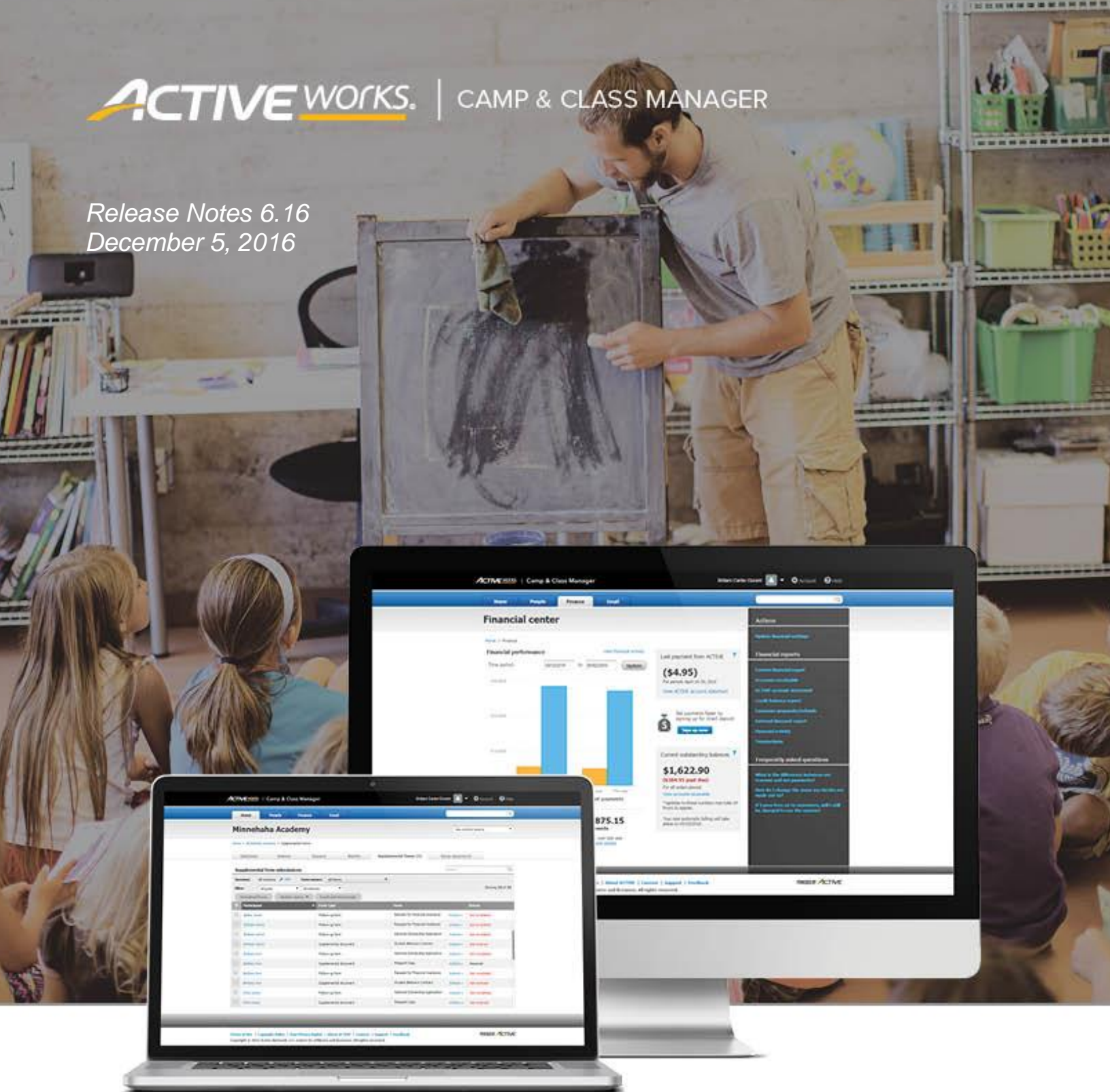


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Release Summary

The purpose of this Release Notes document is to provide a brief, educational summary of the items updated or added in this product release.

Besides providing this document, we will also update existing documentation in the Help Center to show updated workflows. If you have additional questions about this release, please contact the Support team.

Release 6.16 is comprised of product updates on session specific payment plans. Users can now create payment plans that would only apply to specific sessions as well as the plans for the entire season. When purchasing several sessions with different payment plans, separate orders will be created for each payment plan.

We have also added a payment allocation feature that allows users to make payments towards specific items in the order. For example, you can now make a partial payment towards the order, and choose to only pay for a water bottle or a T-shirt instead of a random item in the order.

Organization users can also set up session options that will display on the cart automatically. For instance, mandatory registration fees and late fees can be configured using this option. This option will not be available for purchase on the registration form.

Enhanced Product Features

Session Specific Payment Plans

Payment plan schedules are used to create one or more installments to break up the cost of registration. This allows families to pay a portion of the fee up front, and subsequent installment payments later.

Organization users can now configure payment plans to apply to all sessions or to only selected sessions. This gives organizations an opportunity to create flexible payment dates for sessions that start later in the season.

Create Session Specific Payment Plan

To Create a Session Specific Payment Plan:

1. Go to **Setup**
2. Select **3. Deposits and payment plans**
 - **Note:** Make sure you have one of the *Initial deposit payment amount option* selected
3. Under **Outstanding balance payment options**, select **Payment plan(s) with multiple installment dates**
4. Click **Create a payment plan** button
5. Enter required information:
 - Installments
 - Installment due dates
 - Automatic billing option
6. Select **Selected sessions** for **Session applicability**
7. Select desired sessions
8. **Save payment plan**

Note: Session specific payment plans will show *Selected sessions* under *Session applicability*. Payment plans that apply to all sessions will show *All sessions*.

Rules for Session Specific Payment Plans

- When a new session is created, the new session can use all payment plans in the season that are set up for **All sessions** by default
- When a session that has a payment plan assigned to it is copied, the newly-created session(s) will have the same payment plan
- Sessions are placed on the eligible payment plan with the greatest number of outstanding installments, and if two or more payment plans are tied, then the most recently created payment plan is selected.
- If all sessions in the order are on the same payment plan, then the order is completed as a single order.
- If the sessions are on different payment plans, then the order is split into separate orders by payment plan.
- Confirmation emails are sent only once per purchase per participant, even if more than one order was created

Step 3: Deposits and payment plans

Break up the price of camp by setting up deposits or payment plans.

Initial deposit amount

Specify the minimum amount a customer needs to pay to secure their spot when registering online.

* Deposit amount

- Customers must pay in full in order to check out.
- Customers must pay a deposit of \$ of tuitions in order to check out.
Note that merchandise items always require full payment at the time of purchase
- Customers must pay a deposit of % of session tuitions in order to check out.
Note percentage does not include session options but that merchandise items always require full payment at the time of purchase
- Customers can check out without making any payment.
Note that merchandise items always require full payment at the time of purchase

* Deposit option available until:

Hide full price On session selection page show deposit amount in place of full price.

Outstanding balance payment options

Select method of paying off outstanding balances that best suits your organization.

* Choose how you will have customers pay their remaining balance

- Payment plan(s) with one or several installments
- I will collect the remaining balances myself [Help me choose](#)

Payment plans

Installments	Payment due dates	Availability	Session applicability
4 installments Edit Delete	11/24/2016, 11/30/2016, 01/...	Public	Selected sessions
6 installments Edit Delete	11/29/2016, 11/30/2016, 12/...	Public	Selected sessions
3 installments Edit Delete	11/21/2016, 11/24/2016, 11/...	Public	Selected sessions

[Exit](#) [Save and continue +](#)

Edit payment plan

* Installments:

Payment Schedule: Initial deposit Paid at time of registration

* Installment due dates

1st installment	<input type="text" value="11/24/2016"/>
2nd installment	<input type="text" value="11/30/2016"/>
3rd installment	<input type="text" value="01/05/2017"/>
4th installment	<input type="text" value="01/31/2017"/>

How are the amounts of the installments broken out?

Session applicability

- All sessions
- Selected sessions
2 selected [Edit](#)

* Automatic billing option

- Required ?
- Optional

Payment plan options Internal only ?

[Cancel](#) [Save payment plan](#)

Payment Allocation

Previously, there was not a way for organization users or customers to allocate payments to specific items in an order. Now, you have an option to allocate a specific amount to each line item.

During an internal registration, or on customer online accounts, if a **Custom amount** option is selected, then you can click the **Manage allocation** link to allocate a specific payment amount to each line item in the order. This does not apply to merchandise line items, which are automatically allocated full payment and cannot be modified by the user. Processing fees for registrations are included in the relevant line item.

You may also click the **Auto-fill** link to automatically allocate payment to line items, edit the allocated payment amount for a line item, or click the **Clear all** link to clear all payments allocated to line items.

Allocating payments on Internal Registration

When registering someone internally, if organization users select to pay a Custom amount, then they can click the **Manage allocation** link to allocate a specific payment amount to each line item in the order. Here is an example of the checkout page for an internal registration:

Allocating payments on Internal Customer Account

When making a payment on a customer account under **People** tab, organization users can click **Manage allocation** to see the amount already paid and the outstanding balance for each line item, and allocate a specific amount from a payment to each line item. Below is an example of the options organization users may see:

Item	Total price	Allocation	Balance
Session 1			
John Doe			
Price	\$540.00	\$ 100	\$440.00
Session Option 1	\$54.00	\$ 54	\$0.00
Session 2			
John Doe			
Price	\$200.00	\$	\$200.00

Items	Subtotal
Session 1 - Price Edit Remove 06/05/2017 - 06/09/2017 Community Building John Doe Tuition Price - \$540.00	\$540.00
Session options Session Option 1 - \$54.00	\$54.00
Session 2 - Price Edit Remove 06/12/2017 - 06/16/2017 M - W Community Building John Doe Tuition Price - \$200.00	\$200.00
Subtotal	\$794.00
Total	\$794.00

Payment amount

Pay in full (\$794.00)
 Deposit (\$216.00)
 Custom amount \$ 216.00
 Recommended payment amount \$216.00
 Payment will be automatically allocated. [Manage allocation](#)

Items	Total
House Dance - Advanced Class 12/30/2017 - 01/28/2018 Dancing Classrooms John Doe Session options Lunch	\$500.00
Processing fee	\$5.45
Total	\$515.45
Amount paid	\$105.45
Remaining balance	\$410.00

Payment amount

Total amount due \$410.00
 Pay in full (\$410.00)
 Recommended amount (\$68.34)
 Custom amount \$ 100
 Recommended payment amount \$68.34
 Payment will be automatically allocated. [Manage allocation](#)

Item	Total price	Amount paid	Allocation	Balance
House Dance				
John Doe				
Advanced Class	\$504.95 *	\$104.95	\$	\$400.00
Lunch	\$10.50 *	\$0.50	\$	\$10.00

* Includes processing fee

Allocating payments on Customer Online Account

In customer online accounts, parents can see the outstanding balance for each line item in an order, and allocate a specific payment amount to each line item. Below is an example of the payment allocation page parents may encounter:

Desktop Experience:

ACTIVE SATTVIC RETREATS

Home > Order #C-58BTGQMN9WW > Make Payment

MAKE PAYMENT

PAYMENT AMOUNT

- Minimum payment \$68.34
- Remaining balance \$410.00
- A custom amount** \$
 - Payment will be automatically allocated.
 - [Manage allocation](#)

CARD INFORMATION

* Card type: (VISA, MASTERCARD, AMEX)

CONTACT INFORMATION

the Life

Visit Website
Call 509-555-1212
Send Email

REGISTER FOR MORE PROGRAMS

COMMON QUESTIONS

Who is Active.com?
ACTIVE.com is the leading online

MANAGE ALLOCATION

\$200.00 Intended payment amount | \$200.00 Remaining to allocate | \$0.00 Amount allocated

Auto-fill | Clear all

ITEM	TOTAL PRICE	AMOUNT PAID	ALLOCATION	BALANCE
House Dance				
John Doe				
Advanced Class	\$504.95 *	\$100.00	<input type="text" value=""/>	\$404.95
Lunch	\$10.50 *	\$0.00	<input type="text" value=""/>	\$10.50

* Includes processing fee

CANCEL OK

Mobile Device Experience:

ADIDAS AMERICA INC.

Home > Order #C-1NJDZB8MJ8 > Make payment

Make payment

PAYMENT AMOUNT

- Remaining balance \$20,000.25
- Custom amount** \$
 - Payment will be automatically allocated.

CARD INFORMATION

* Card type: (VISA, MASTERCARD, AMEX)

Session Options to Add on Checkout Page

Mandatory session options can now be set up to apply automatically to the cart. It will not be available as an option on the **2. Participants & Options** section on the registration form.

Set Up Session Options to Automatically Add on Checkout Page

To Configure a Session Option to Auto-Apply to Cart:

1. Go to **Setup > 2. Sessions**
2. Click session name
3. Click **Edit details** next to Session option
4. **Create new session option type**
5. Display type: **Add on checkout page**
6. Display condition: **Always display**
7. **Save**
8. **Save and Continue**

Create new session option type

Set a display type and display condition for all session options of this type.

* Session option type:

Display type:

Display condition:

Cancel Save

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