

Product Release Notes for ACTIVEWorks Endurance – July 17, 2018

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Consumer journey improvement: Someone else 18 or over / under 18 question forms

Getting people to convert during the registration flow is very important; limiting unnecessary fields and merchandise during the flow helps increase conversion. You can now configure different sets of questions to appear on the registration form, depending on whether your customer is:

- Registering for themselves (**Myself** tab).
- Registering on behalf of an adult (Someone else 18 or over tab).
- Registering on behalf of a minor (Someone else under 18 tab).

Customers registering on behalf of someone else or a group no longer need to know other people's information (other than their names, dates of birth and email addresses), which could otherwise hold-up or derail the registration.

To use this new feature:

- the HOME > an event > Setup > Event setup > Restrictions and settings > Allow multiple selection on registration page must be set to Yes.
- you must confirm that you wish to use these new forms, as you must remember to configure the questions on these new forms and you cannot revert back to displaying only the **Myself** form (to stick with only the **Myself** form, just click **Keep existing forms**).

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HOME PEOPLE FINANCIALS EMAIL GLOBAL MERCHANDISE GLOBAL DISCOUR	NT RACE PASS DOCUMENT Q	
Step 6: Form qu	Event setup	
Myseif To edit the sections of them By utiling outcom question of disks (which may be addressed) Oto addressed of the new Someone else 18 or over and Someone else und forms, policies domines, dark or concerning health or securit Mote: Hyou select to use this new feature, then you must configure yo questions in the new Someone else 18 or over and Someone else und forms. After selecting to use the new forms, it is not possible to revert to sing only the old forms. Mote: Participant name First name *	Our ler 18 Dur ler 18 Myself Someone else 18 or over Someone else under 18 To edit the sections of the someone else 18 or over form, click Edit form. Image: By utilizing custom questions on the registration form, you agree not to collect or elicit any special categories of data (which may be amended from time to time), including, but not limited to data revealing racial or ethnic origin, political opinions, or religious or other beliefs, trade-union membership, as well as	Event setup 1. Event details 2. Restrictions and see 3. Registration catego 4. Self-registration test 5. Self-edit setup 6. Form questions 7. Giving
Last name *	personal data concerning health or sexual life or criminal convictions.	8. Additional purchase
		9. Waivers
	Participant name Edit form	10. Emails sent out
	First name *	11. ACTIVE.com listing 12. Activation
	Last name *	Additional links
		Event summary
	Gender * Male Female	Dashboard
		Tools
	Date of birth * MM/DD/YYYY	Preview registration f
	Email address *	Questions?
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	Clown shoe size	

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When customers register on behalf of another person, they can now select **Someone else**, **18 or older** or **Someone else**, **below 18** forms to complete the corresponding set of questions:

ACTIVE		
		English (United States) +
SELECT CATEGORY	COMPLETE FORM	CHECKOUT
Registration		
⊘You may lose your registration spot if y	our browser session is idle for more than 15 minutes.	
alexander.fu@activenetwork.com	1	Change account
YOUR INFORMATION		
Lilo Stitch (alexander.fu@active	etwork.com)	COMPLETE V
Running-1K - Individual /	Age group/open	
Participant #1		
* Who is this registration for?	Someone else, 18 or older	*
	Myself	
PARTICIPANT INFO	Someone else, 18 or older	
* First name	Someone else, below 18	
* Last name		
* Gender	Male Female	
Date of birth	Month T Day T 2018	.
* Email address		
* Day phone	Ext.	
Clown shoe size		

Organizations using the **Language Translations Tool** (a Premium-tier feature) can provide translations of the questions on the new **Someone else, 18 or older** or **Someone else, below 18** forms, to ensure that all of their customers can easily register for their events:

Someone else 18 or ov	ver form			
Participant name				
Nombre *				
Apellidos *				
			Translate	
Gender *	Hombre Mujer			
			Translate	
Date of birth *	D/M/YYYY		Translate	
Email address *			Translate "Date of birth" properties	×
Day phone *		Ext.	Question Fecha de nacimiento	
Clown shoe size				
			4	
			Cancel Save	

Merge duplicate persons

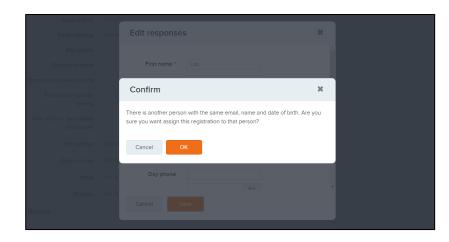
Duplicated customer accounts cause confusion and make it harder for you to manage registrations and understand the value of your customers.

In this release, we've cleaned up the data by merging multiple persons with identical **First Name**s, **Last Name**s, **Email**s and **Date**s **of birth** into a single person (if they have different **Gender**s, **Day phone**s or addresses, then the most recently updated data is retained).

For Premium-tier organizations using the Customer Relationship Management (CRM) feature (the **PEOPLE** tab), this means that revenue, registration, referral and email engagement statistics, which were previously spread out across multiple persons, are now correctly consolidated into a single person. This gives you a far more accurate picture of that person's contribution to your organization.

And for persons with different **First Name**s, **Last Name**s, **Date**s **of birth** or **Email**s who should actually be one person, both you and your customers can now edit this information to merge duplicate persons.

In the Registration View, you or your staff can edit a person's **First Name**, **Last Name**, **Date of birth** and **Email**. If these fields match another person's account, then the two accounts are merged:



When your customers register for an event, they can edit their **First Name**, **Last Name** and **Date of birth**. If these fields and their **Email** address match another person's account, then the two accounts are merged:

		Merge accounts ×	English (United States) -
SELECT		s another person with the same email, name and date of birth. J sure you want to merge your accounts together?	
Edit person	Cano	cel <mark>OK</mark>	
Warning! Any changes yo future).	ou make t	o your personal information will update your profile on ALL registrations and purchases	
Active.com acco	ount		
* First	name		
* Last	name		
* G		Male Female	
* Date o		January 👻 1 💌 1970 👻	
Email ac	dress		

When your customers use the **My Events** website to manage their registrations, they can now edit their **Date of birth**. If their **Date of birth**, **First Name**, **Last Name**, and **Email** address match another person's account, then the two accounts are merged:

		Merge	accounts		×	English (United States) -
Personal info - A		another person with the same en sure you want to merge your acc		ate of birth.		
Warning! Any changes	Cano	ОК				ent and future).
Participant	name	Lilo Stitch			_	
* Gi	ender	 Male Female 				
* Date of	f birth	January	1 -	1971 -	7	
Email ad	ldress	alexander.fu@activenetwork.com				

After two accounts are merged:

- All registrations belonging to the original accounts are placed under the single, final account.
- All statistics for the final account are re-calculated by combining the data in the original accounts.
- The merge cannot be undone.

Customer Relationship Management permission

You can now grant access to the Customer Relationship Management (CRM) tool (the **PEOPLE** tab; a Premiumtier feature) to trusted staff members, who can then use this powerful tool to search for and engage with your customers.

Organization **Owner**s can now add the new **Customer Relationship Management** permission to a custom role. **Owner** and **Coordinator** roles are also granted this permission by default.

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		Role description	s will be added in invi	itation emails.	li li	People							
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		Bib ma	nagement										
		Create	series and events			People who ma	tch all 🗸 of the	following condition	IS				Save as custom segment (
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		Docum	ent management			G Add condit	lon						Clear Search
						20 Results							
						20 Results NAME	EMAIL ADDRESS	PH	ONE (CITY STAT	re geni	DER REVENUE	

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