Product Release Notes for ACTIVEWorks Endurance – July 17, 2018
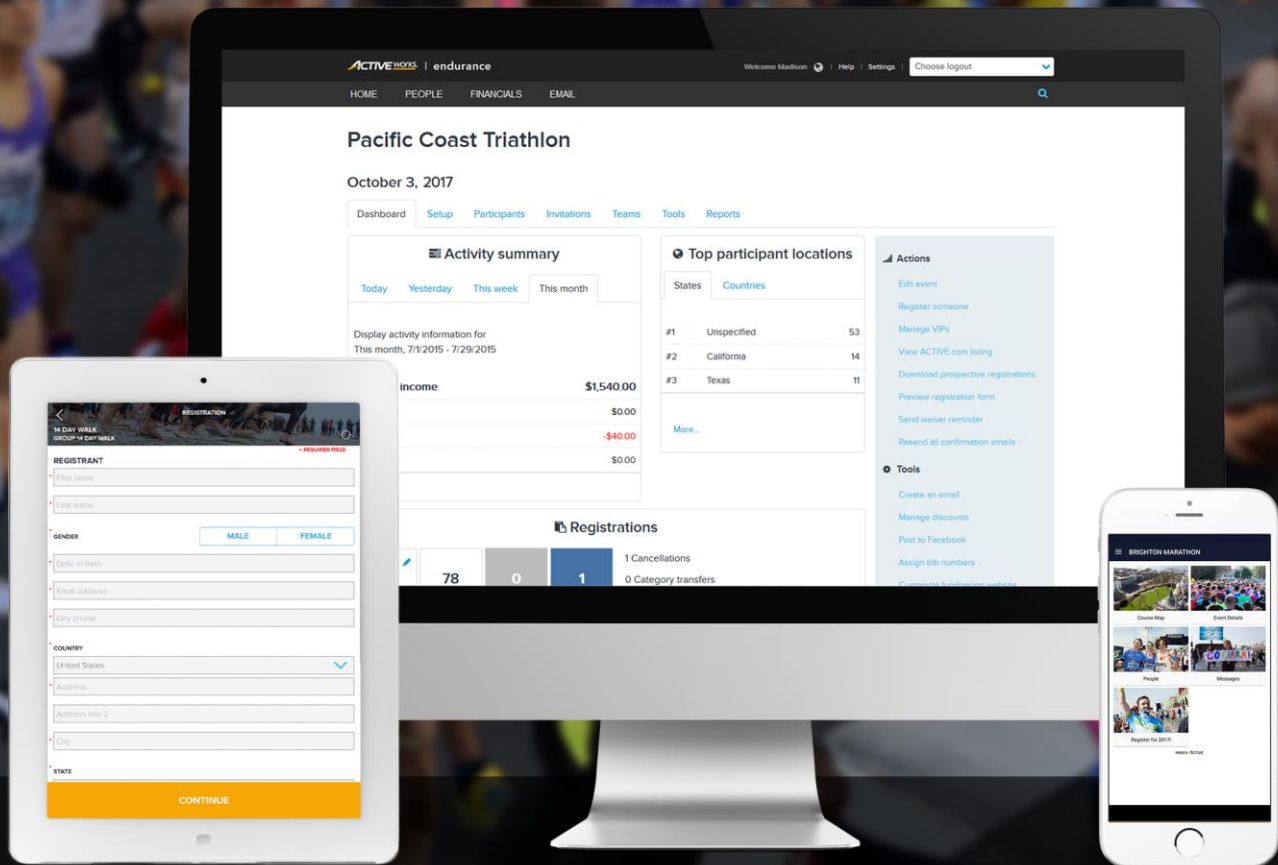
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Consumer journey improvement: Someone else 18 or over / under 18 question forms

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**).

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:

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:

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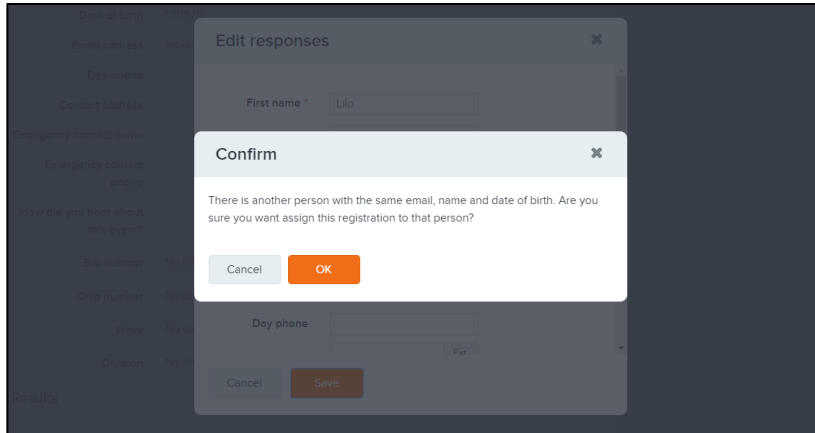
When your customers register for an event, they can edit their **First Name**, **Last Name** and **Date of birth**. If these fields and their **Email** address match another person's account, then the two accounts are merged:
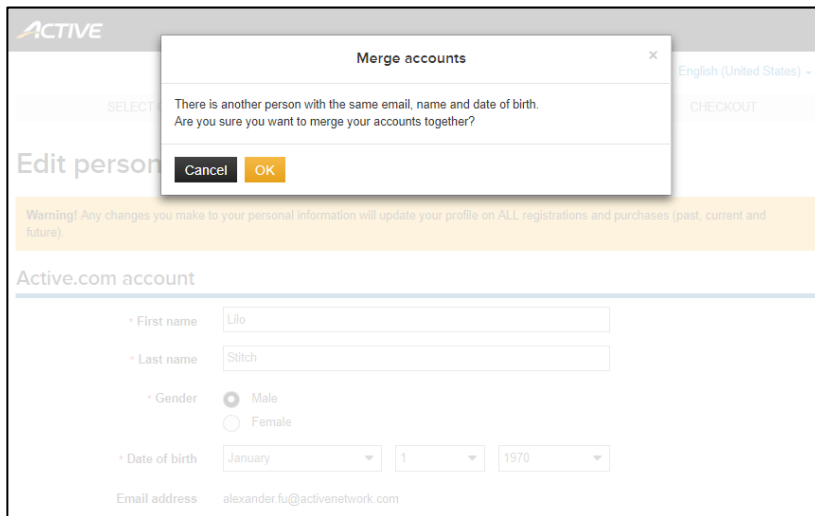
When your customers use the **My Events** website to manage their registrations, they can now edit their **Date of birth**. If their **Date of birth**, **First Name**, **Last Name**, and **Email** address match another person's account, then the two accounts are merged:
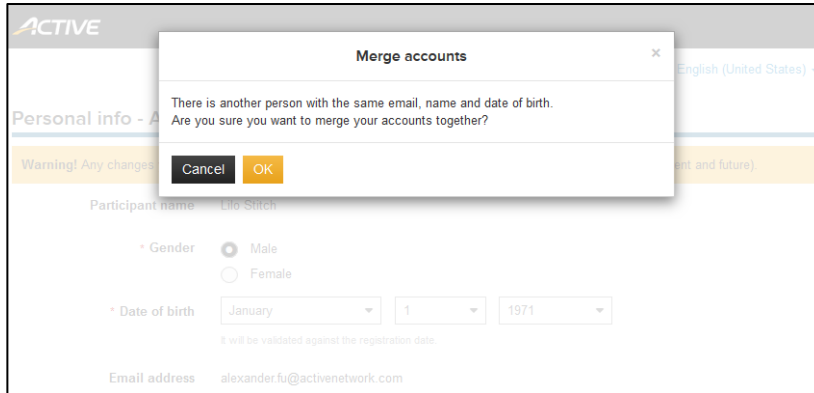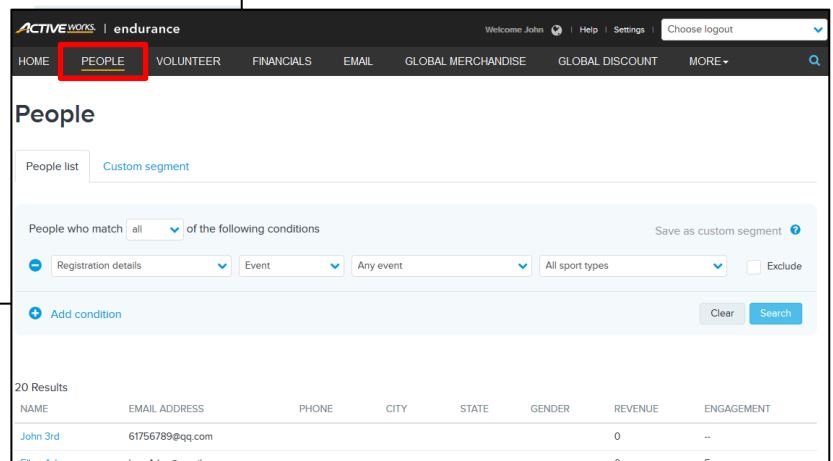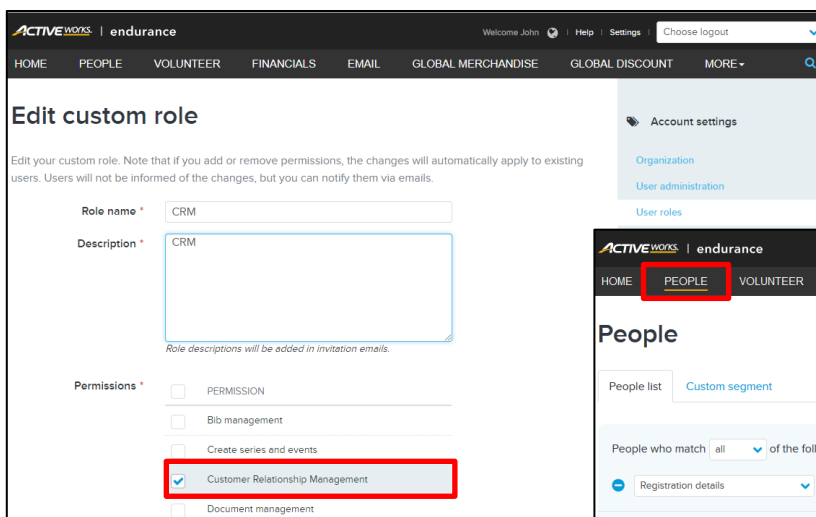
After two accounts are merged:

- 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 Premium-tier 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.

ACTIVE Network, LLC

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