



Product Release Notes for ACTIVEWorks – April 6, 2023

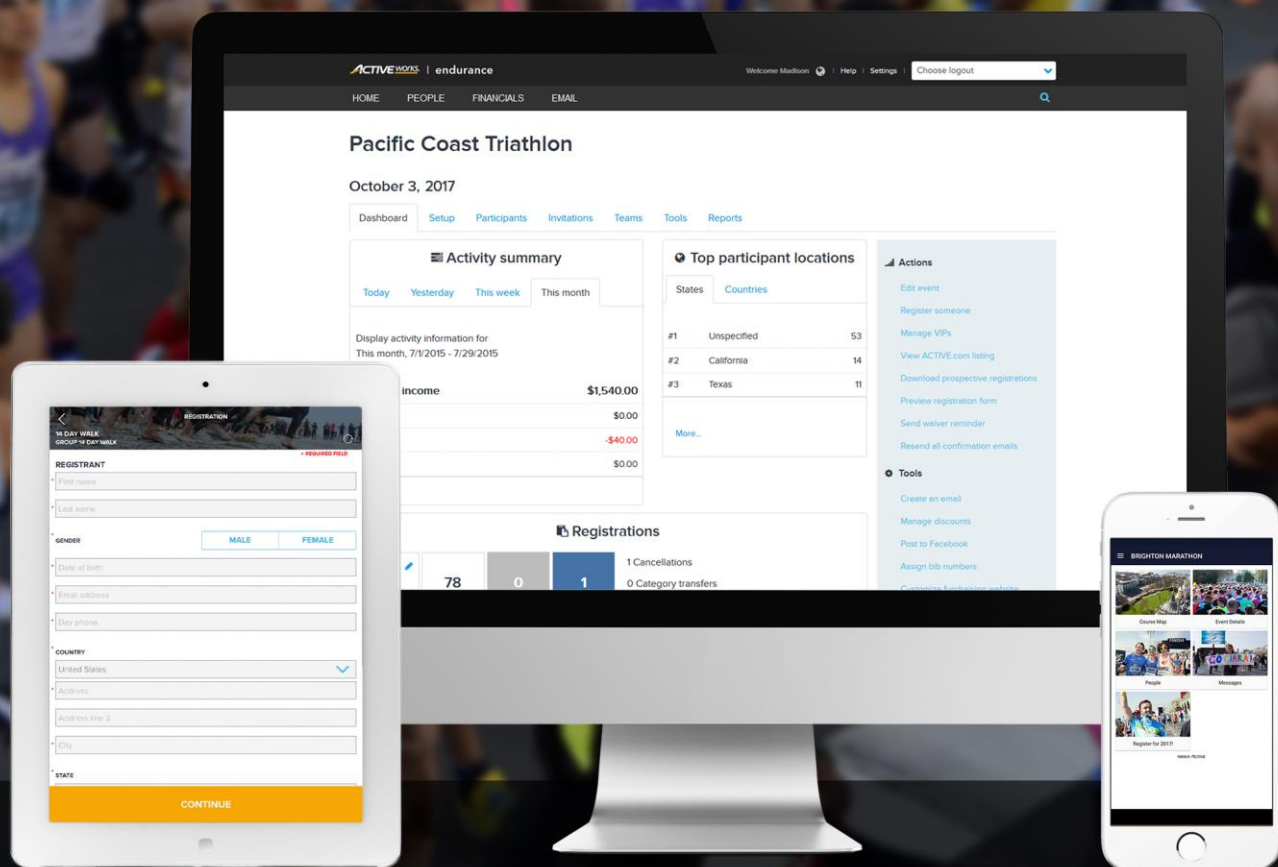


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Credit balance enhancements

The credit balance feature has been enhanced:

- On the **Settings > Payment accounts** page, a new **Credit balance settings** section has been added. You can now configure credit balances from refunds to:
 - Never expires**
 - Expire a number of **day(s) after refund**

ACTIVE WORKS Welcome Anila What's new! Help Settings Choose logout

HOME PEOPLE VOLUNTEER FINANCIALS EMAIL GLOBAL MERCHANDISE GLOBAL QUESTIONS GLOBAL DISCOUNT RACE PASS DOCUMENT

Payment accounts

Your organization's payment accounts are listed below. You can set up multiple accounts to be used for specific events.

To specify which payment account to be used for an event, go to your event's Setup tab, and then click Event setup.

[Add an account](#) [Edit](#)

	ACCOUNT DESCRIPTION	ISSUE PAYMENT AS	PAYABLE TO	SEND PAYMENTS TO	CURRENCY	STATUS
<input type="checkbox"/>	Primary account	Check	Simpsons Sports	6 Broad Street worchester, test W...	USD	Active
<input type="checkbox"/>	secondary account	Check	Simpsons Sports	717 North Harwoo... Dallas, TX 75201	USD	Active

Credit balance settings

Credit balances from refunds

Expiration date* ☐ Never expires
☒ 60 day(s) after refund

[Cancel](#) [Save](#)

Account settings
Organization
User administration
Payment accounts
Custom branding
Multi-event app
Price type restrictions
Custom analytics

- The **FINANCIALS > Credit balance report** now includes new **Expiration date** and **Is Expired** columns:

First name	Last name	Email	Credit balance	Currency	Credit creation date	Agency payment account	ActiveID/ AgencyID	Expiration date	Is expired
			13.8	USD	12/21/2021	Simpsons Sports	AgencyID	11/27/2023	FALSE
			22	USD	12/21/2021	Simpsons Sports	AgencyID	11/27/2023	FALSE
			6	USD	3/7/2023	Simpsons Sports	AgencyID	3/30/2023	FALSE
			10	USD	3/7/2023	Simpsons Sports	AgencyID	3/31/2023	FALSE
			300	USD	1/20/2022	Simpsons Sports	AgencyID	3/15/2022	TRUE



- On the **PEOPLE** tab > a participant > **CREDIT BALANCES** tab, you can now view a record of all credits issued to the participant by clicking the new **View history** button:

People > camps1 active

camps1 active

Female | 38 (■■■■■)

✎

✉ ■■■■■

☎ ■■■■■

📍 ■■■■■

Gross revenue

\$65.00

■

\$65.00 REGISTRATION \$0.00 MERCHANDISE

0 Referrals \$0.00 Referral revenue 0 Events shared

Registrations

2

Email engagement

F

No influence

☆☆☆☆☆

EVENTS EMAILS VOLUNTEER RESULTS **CREDIT BALANCES**

Total amount

\$338.00

◀ ▶

Add balance **View history**

Simpsons Sports \$338.00 ⓘ Refund

PAYMENT ACCOUNT CREDIT

Balance history ✕

DATE & TIME	AMOUNT	EXPIRE ON	ADDED BY	NOTES
3/6/2023 9:02 p.m.	\$6.00	3/30/2023	May. ■■■■■	
3/6/2023 9:03 p.m.	\$10.00	3/31/2023	May. ■■■■■	

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Close



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