



Product Release Notes for ACTIVEWorks – May 18, 2023

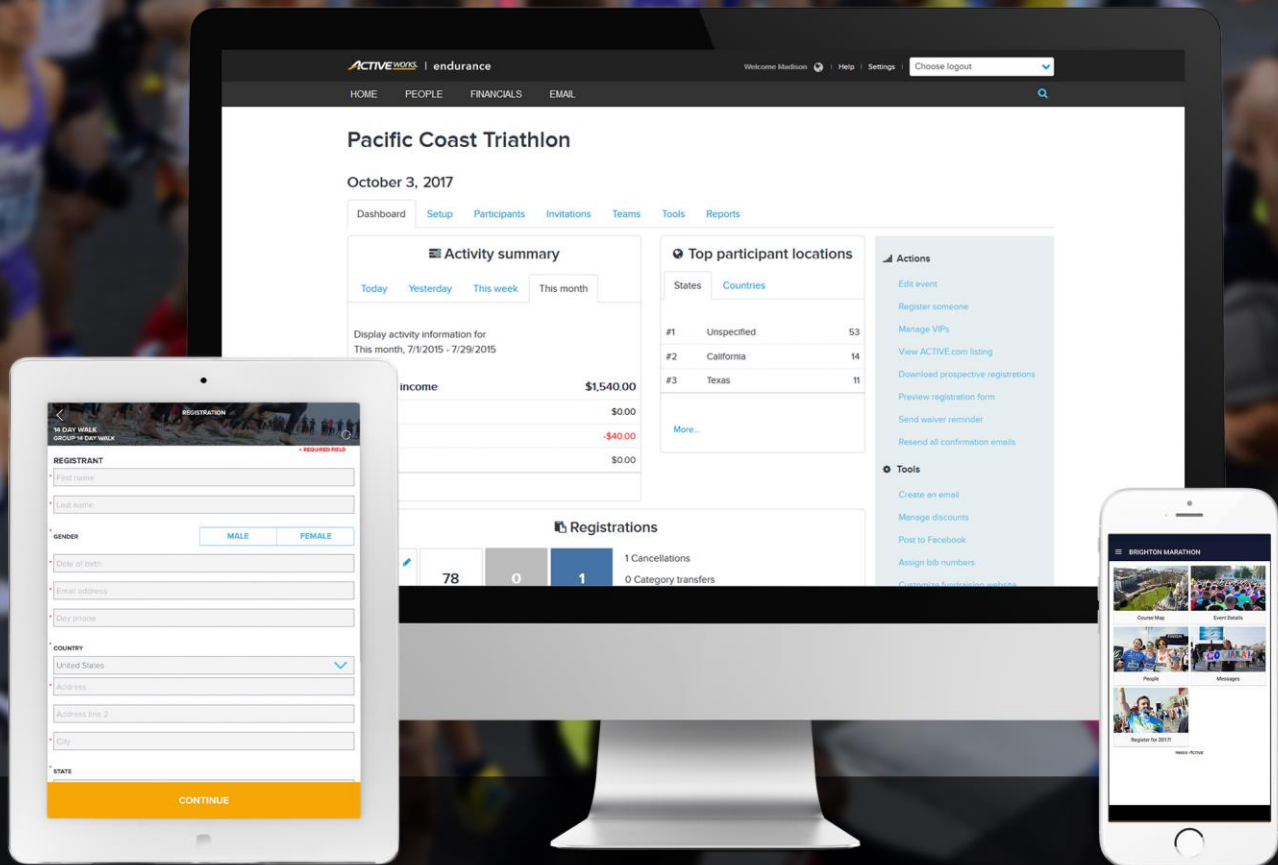


Table of Contents

Credit balance enhancement: New permission	2
Credit balance enhancement: Edit credit balance expiration date	3



Credit balance enhancement: New permission

Staff users with the new **Settings > Account settings > User administration > User roles > Create custom role > Permissions > Manage credit balances** permission can view and edit customers' credit balances.

- The **Owner** user role has the **Manage credit balances** permission by default.

ACTIVEWORKS Welcome As [What's new!](#) [Help](#) | [Settings](#) | [Choose logout](#)

[HOME](#) [PEOPLE](#) [VOLUNTEER](#) [FINANCIALS](#) [EMAIL](#) [GLOBAL MERCHANDISE](#) [GLOBAL QUESTIONS](#) [GLOBAL DISCOUNT](#) [RACE PASS](#) [DOCUMENT](#)

Create custom role

Create a role with customized permissions.

Role name *

Description *
Role descriptions will be added in invitation emails.

Permissions *

- ☐ PERMISSION
- ☐ Bib management
- ☐ Create series, events and passes
- ☐ Document management
- ☐ Event financial reports
- ☐ Event maintenance
- ☐ Financial settings management (Org. functionality)
- ☐ Front desk registration
- ☒ **Manage credit balances**
- ☐ Manage global discount

[Account settings](#)

[Organization](#)

[User administration](#)

[User roles](#)


[Payment accounts](#)

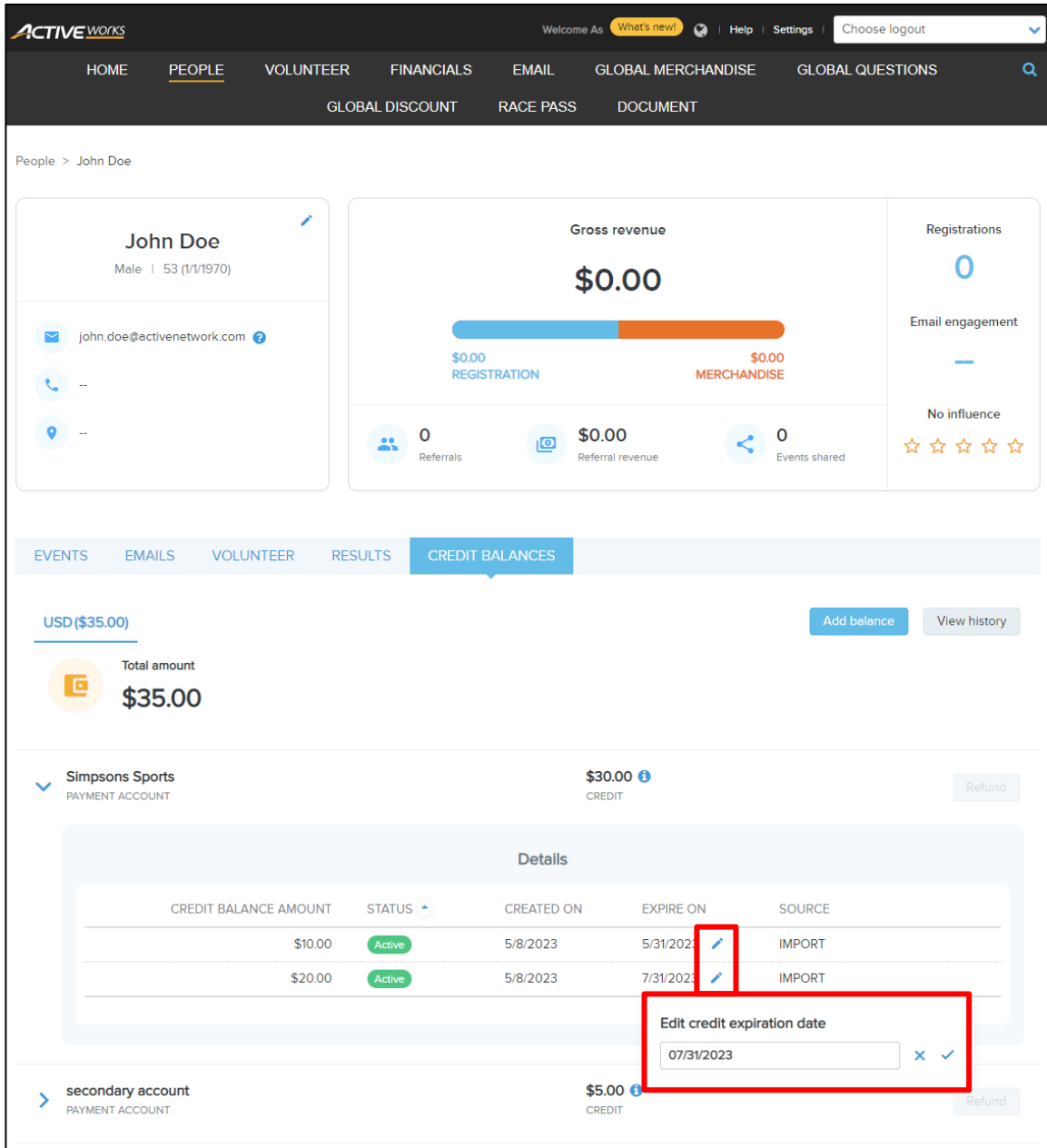
[Custom branding](#)

[ACTIVE admin settings](#)



Credit balance enhancement: Edit credit balance expiration date

You can now edit the expiration date of a customer's credit balance by clicking the **PEOPLE** tab > a participant > **CREDIT BALANCES** tab > a currency tab > an account > **EXPIRE ON** column > an expiration date >  icon and then select a new expiration date:



The screenshot displays the ActiveWorks interface for managing a customer's credit balance. The top navigation bar includes tabs for HOME, PEOPLE, VOLUNTEER, FINANCIALS, EMAIL, GLOBAL MERCHANDISE, GLOBAL QUESTIONS, GLOBAL DISCOUNT, RACE PASS, and DOCUMENT. The sub-header indicates the user is viewing 'People > John Doe'.

The main content area shows a profile card for John Doe (Male, 53, 1/1/1970) with contact information. Below this, a 'Gross revenue' section shows \$0.00, broken down into \$0.00 for REGISTRATION and \$0.00 for MERCHANDISE. A 'Registrations' section shows 0 registrations, and an 'Email engagement' section shows no influence.

The 'CREDIT BALANCES' tab is selected, showing a total amount of USD (\$35.00). Below this, a 'Details' table lists credit balances:

CREDIT BALANCE AMOUNT	STATUS	CREATED ON	EXPIRE ON	SOURCE
\$10.00	Active	5/8/2023	5/31/2023	IMPORT
\$20.00	Active	5/8/2023	7/31/2023	IMPORT

A modal dialog titled 'Edit credit expiration date' is open, showing a date input field with '07/31/2023' and buttons for 'x' and '✓'.