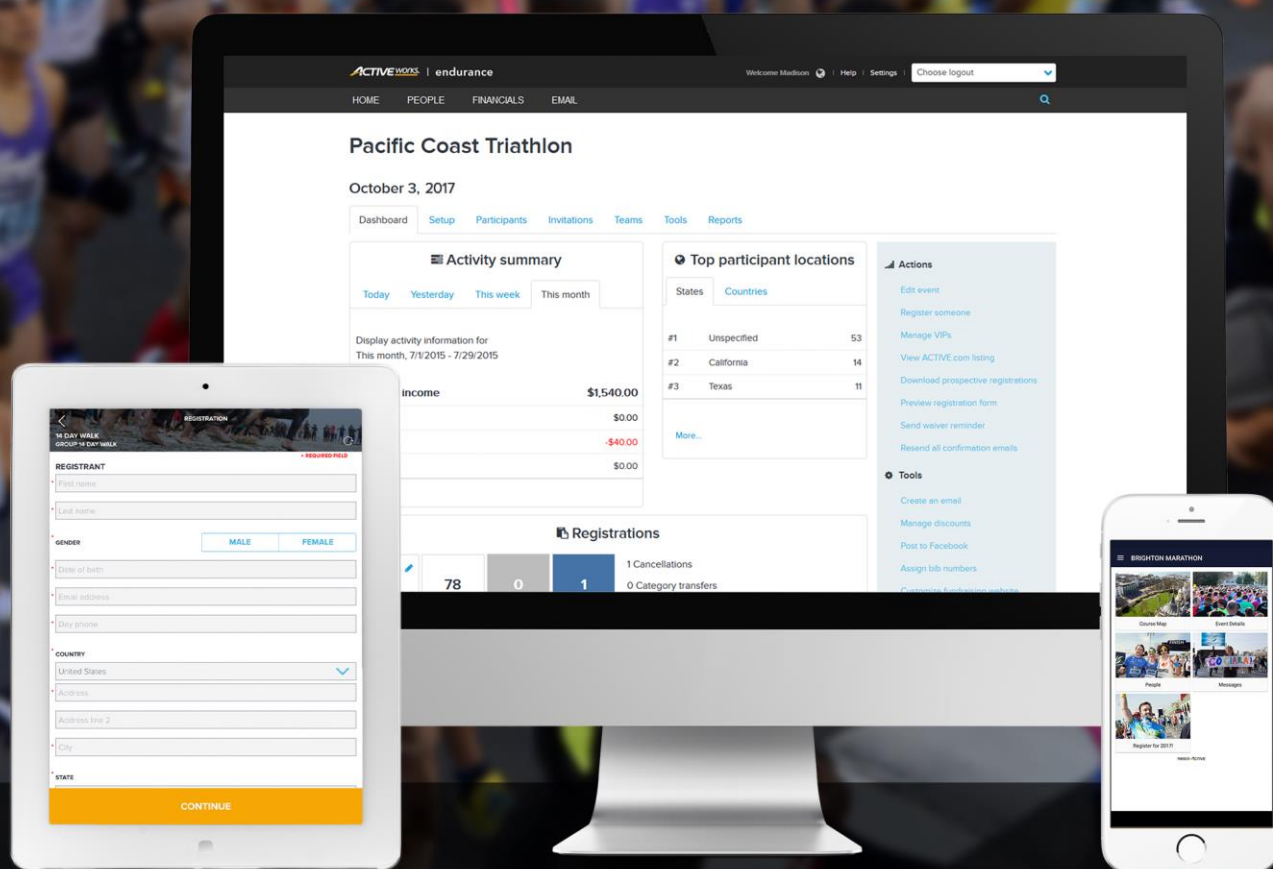




## Product Release Notes for ACTIVEWorks – September 13, 2022



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## Event price type registration restriction by consumer categories

### New API: Consumer registration form access control

Several event organizers have asked for access control tools that allow them to restrict consumers' access to events and categories based on unique rules.

Those rules are controlled by event organizers and are held in a database that is stored outside of ACTIVEWorks: for example, you might have a database of athletes and their historical race times which make them eligible for certain races or starting corrals. You might also have a membership database or other database that categorizes your consumers, e.g., as Gold Members, Silver Members, Elite Athletes or VIPs, or it could be a key sponsor's database that they do not want to share.

Moving data around is subject to many rules and processes and obtaining consent is often hard to achieve. This new feature allows you to create a query connection between a 3<sup>rd</sup>-party database and the ACTIVEWorks registration form that will allow or deny a consumer to access registration.

#### Step 1: Agency-level activation

1. Navigate to ACTIVEWorks > **Settings** > **Account settings** > **Price type restrictions**.
2. Turn on the **Enable price type restriction by consumer category** switch.
3. Enter the API **URL** and **KEY** for your organization's consumer category database. You can test the connectivity by clicking the **Test Connection** button.
4. Create and add **Consumer category mappings** which map each consumer **CATEGORY ID** (from your organization's consumer category database) to a **CATEGORY NAME** in ACTIVEWorks.

**Note:** For specific information on the API that your organization needs to provide (including **URL**, **KEY** and **CATEGORY ID**), please see the [ACTIVEWorks Consumer Category API Contract](#).



## Price type restrictions

☒ **Enable price type restriction by consumer category**  
Your organization can restrict visibility and accessibility of an event price type to specific consumers by consumers' category.

For ACTIVEWorks to determine which consumers belong to which categories, enter the API URL for your organization's consumer category database (specifications for this API can be found [HERE](#)).

URL

KEY

### Consumer category mapping

Specify the consumer category name to appear in ACTIVEWorks corresponding to the ID returned by your organization's consumer category API above.

CATEGORY NAME	CATEGORY ID	
Platinum	1001	
Gold	1002	
Silver	1003	

Add consumer category

#### Account settings

- Organization
- User administration
- Payment accounts
- Custom branding
- Multi-event app
- Price type restrictions**

## Step 2: Configure registration restrictions by consumer categories for a specific event

Ensure that you have completed [Step 1: Agency-level activation](#) and you have a live connection from ACTIVEWorks to your organization's consumer category API URL.

To configure registration restrictions by consumer categories for a specific event:

1. Select the event > **Setup** > **Registration categories** > a **Price Type** > **Price restrictions** settings.
2. Turn on the **Price type eligibility** switch.
3. Select the consumer categories (e.g., membership types in your database) that can register for this price type from the **Consumer categories** dropdown.
4. To apply these restrictions in a date range, select the **Restrict by date** checkbox and then select the **Start date** (required) and **End date** (optional), between these dates these restrictions are applicable and everyone can register for this price type outside of this date range after it is published.



### Edit price type restrictions

Registration password

☐ Address restriction

☒ Price type eligibility

Consumer categories

☒ Restrict by date

Start date

End date

### Registration categories

Create at least one registration category for your event.

**Running-5K** [Edit](#) [Delete](#)

Category type: Running | Distance: 5K

**Category restrictions** [Edit](#)  
Unlimited capacity | Ages 0 to 60 as of registration date | Male & Female | Everyone

**Date & location** [Edit](#)  
12/31/2022 Springfield

**Individual Age group/open** [Edit](#) [Delete](#)  
Price type: Individual | Price: \$10.00

**Price restrictions** [Edit](#)  
Unlimited capacity | Ages 0 to 60 as of registration date | Male & Female | Everyone | No password

Eligible consumer categories: 2 selected

**Event setup**  
[Event details](#)  
[Restrictions and settings](#)  
**[Registration categories](#)**

**Questions?**  
[Help center](#)

## Comments



## Demo: Consumers register for an event restricted by consumer categories

In the event registration flow, a price type restricted to specific consumer categories is displayed with the corresponding eligible consumer category tags. Only consumers belonging to the eligible categories can register for the price type.

**Note:** If a consumer is already logged in, then their ineligible price types are NOT displayed.

ACTIVE

English (United States) ▾

SELECT CATEGORY COMPLETE FORM CHECKOUT

### Run for fun

#### Running-5K

Individual Age group/open \$10.00 - 0 +

Platinum Gold

Ages 60 and under as of registration date

Run for fun

#### Running-3K

#### Running-5K

Individual Age group/open \$10.00 - 0 +

Only customers in the listed categories are eligible to register for this.

Platinum Gold

Ages 60 and under as of registration date




Non-participating team captain \$3.00 - 0 +


Ages 60 and under as of registration date

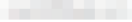


If a consumer is NOT eligible for a registration, then the following message is displayed:


**YOUR INFORMATION**


  **INCOMPLETE** 

 You are **ONLY** eligible for tickets that are open to all customer categories. Please click [HERE](#) to start over and reselect.




Email address 



☒ Send me an email reminder if my registration is incomplete.

\* First name 

\* Last name 

\* Gender ☒ Male ☐ Female

\* Date of birth   

\* Day phone  Ext. 

**NEXT**

## Improved event-level custom reports for affiliates and partners: New PromoLink Name and PromoLink Discount Amount columns

PromoLinks have now increased reporting capability at the event level, with **Promo Link Name** and **Promo Link Discount Amount** available as filters in custom reports.

Example case: As an event organizer, you may work with affiliates and partners to help grow and advertise your events; they could be individual marketplaces, charities, corporates, social influencers or digital platforms who are willing to advertise your events. You might offer these partners discounts to end-consumers or offer a commission based on success/registrations.

Measuring attribution and performance is critical to managing these partners. Providing real-time reporting to those partners is critical to allow you to track performance at the registrant and revenue level.

Some ACTIVEWorks clients are working with a digital marketplace called <https://worldsmarathons.com/> (WSG) who advertises their events to their audience of international athletes. You can independently agree to pay them a fee for each unique registration they generate and you need a system to support both of you.

### Step 1: Create a PromoLink

1. Go to the event > **Tools** > **Discounts** > **PromoLink**.
2. Create a Promolink for \$0 discount.





3. Name it something logical, e.g., “Your Event Name\_World Sports Group Affiliate”.
4. Share that unique PromoLink registration URL with WSG.
  - a. WSG can then publish that link on their digital platforms.
  - b. Anyone who registers for your event via that unique URL is tracked and reported in ACTIVEWorks.

## **Step 2: Create a custom report with PromoLink information**

To create a custom report for WSG so that you can both track the success of the campaign:

1. Go to the event > **Reports** > **Custom Registration Reports**.
2. Create a custom report.
3. Add the columns that you require including **Promo Link Name & Promo Link Discount Amount**.
4. Filter the report by **Promo link name**.
5. Enter a name for the report, e.g., “Your Event Name\_World Sports Group Affiliate”.
6. Share the custom report via a unique URL with WSG.

**Note:** Please be aware of sharing your customers’ personal information with 3<sup>rd</sup> parties and ensure that you have the consent to do so.

Another example where this can be used to help grow participation:

Your events attract a lot of people who run for good causes. You should reach out to 50 charities and ask them to advertise your event. In return, you might give each of them a fixed-price entry (e.g., \$25) or fixed discount (e.g., 25%) for their athletes. This allows your 50 charities to publish their unique PromoLink on their platforms and use the custom report to track who signed up, they can then create follow-up campaigns with John Smith and Joe Bloggs on their side to encourage them to fundraise or give them training tips, etc. It becomes their responsibility to activate the fundraising, but you receive an all-important registered participant.

**Note:** For more information on PromoLink discounts, please see [Creating Promolink Discounts](#) and [Access Promolink](#).



[Dashboard](#) [Setup](#) [Participants](#) [Invitations](#) [Teams](#) [Tools](#) [Reports](#) [Express registrations](#) [Virtual race](#)

[Revenue report](#)  
Provides a list of all payments and transactions, including summaries for total net income, refunds and processing fees.

[VIP invitation report](#)  
Provide a list of personal information for your VIP invitees.

### Custom Registration Reports

Select one of the following custom registration reports, or create a new one that displays the data of your choice.  
All times displayed in reports reflect Greenwich Mean Time (GMT).

[Create](#) [Edit](#) [Delete](#) [Share](#)

☐

all

☒

Your Event Name\_World Sports Group Affiliate

☐

promo link 1





### Add and remove columns

Choose the data you want to appear in your report. Drag and drop to reorder and move items.

Copy columns from an existing report Select an event

#### Available

Emergency contact name

Emergency contact phone

How did you hear about this event?

Promo link name

Promo link discount amount

+

+

+

+

+

#### Selected

Registration time

Registration gross revenue

Registration discount

Discount name

Registration type

⊖

⊖

⊖

⊖

⊖

Add all >

< Remove all

### Filter results

Refine the list of people who will appear in your report.

People who match all of the following conditions

⊖

Promo link name

Your Event Name\_World Sports

+ Add condition

Clear

### Save

☒ Save report (enter a custom registration report name if desired)

Your Event Name\_World Spor

Cancel

Create report

The screenshot shows how to create a report that has no personal information belonging to your customers; this is often best practice to protect both you and your partner:

Registration number	Event number	Registration ID	Price type	Registration category	Registration time	Registration gross revenue	Registration discount	Discount name	Registration type	Promo link name	Promo link discount amount
R-10PT42PSBR7	E-00V5541B	27039691661681	Individual Age group/open	Running-1K	9/2/2022 6:37	18	2.7	Group Affiliate	PromoLink	Your Event Name_World Sports Group Affiliate	2.7

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## **About ACTIVE Network, LLC**

ACTIVE Network, LLC is a technology and media company that helps millions of people find and register for things to do and helps organizations increase participation in their activities and events.

For more information about ACTIVE Network, LLC products and services, please visit [ACTIVEnetwork.com](https://ACTIVEnetwork.com).

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