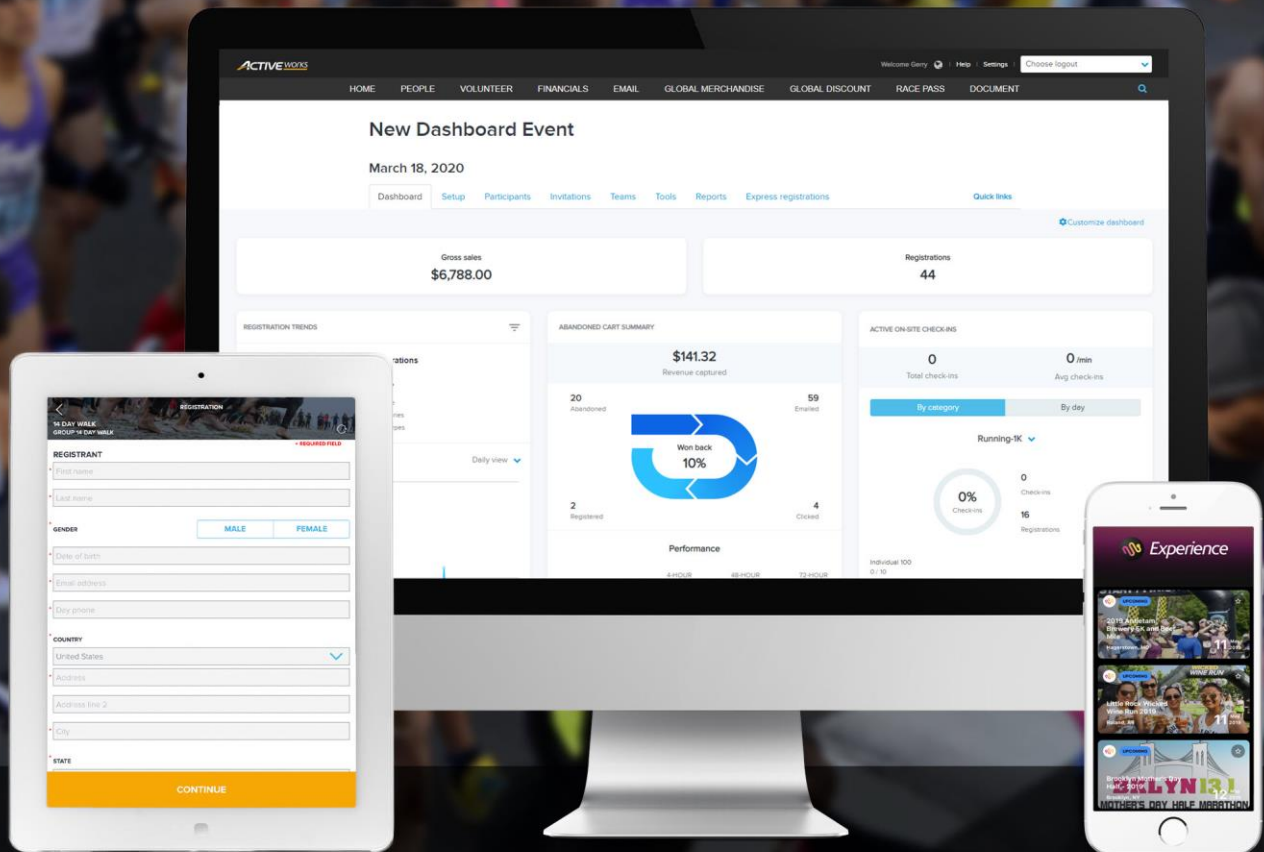




## Product Release Notes for ACTIVEWorks – September 22, 2020



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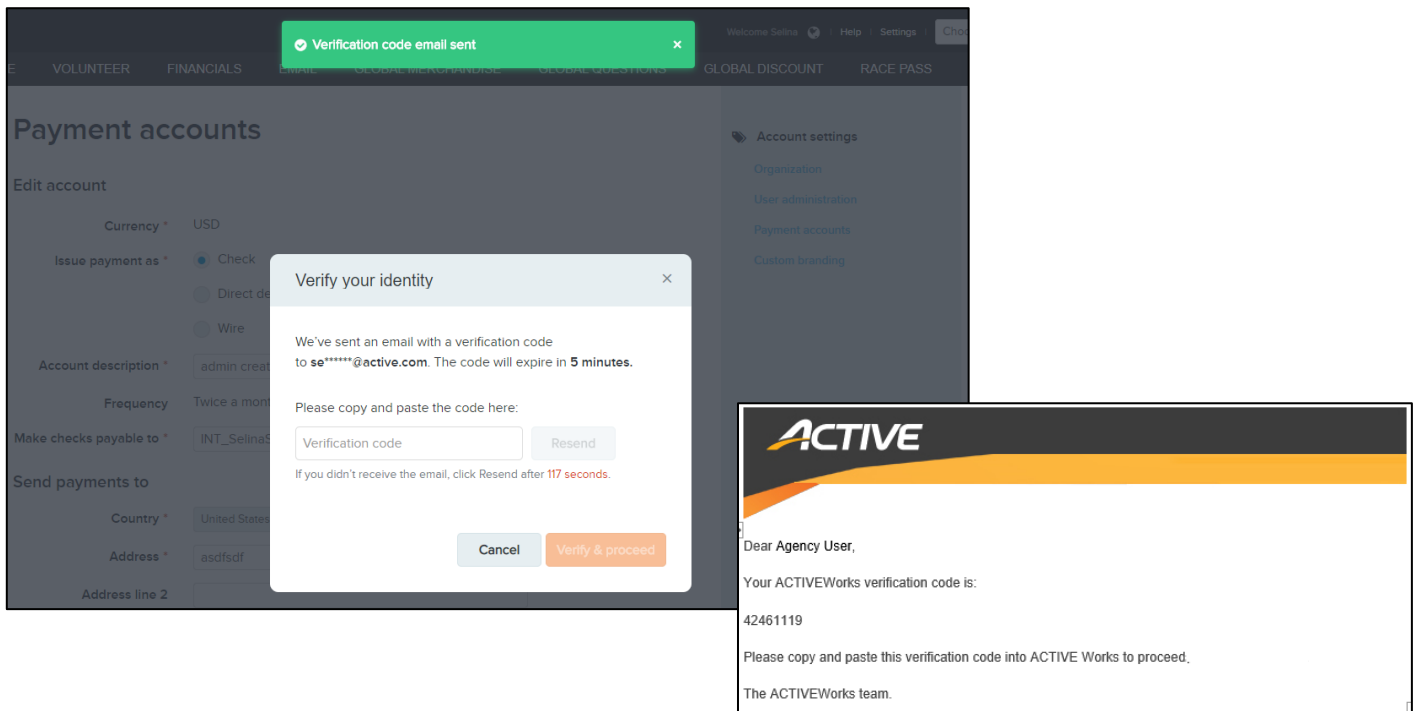


## Enhanced security for payment accounts and user administration

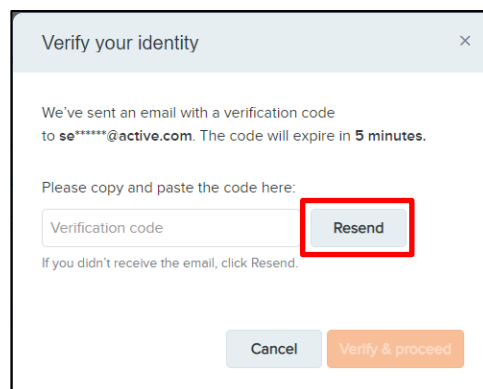
To enhance security, before you or your staff can:

- Add or **Edit** a payment account (**Settings** > **Account settings** > **Payment accounts**)
- **Invite a new user**, edit or **Delete** a user (**Settings** > **Account settings** > **User administration**)

you must first verify your identity by entering a verification code that is sent to your registered email address:



- The verification code is valid for 5 minutes after it is first emailed out.
- If you fail to receive the verification code email after 120 seconds, then you can click the **Resend** button:



- Entering an incorrect verification code more than 5 times will block the verification process for 5 minutes.



## JustGiving fundraising and donations

As CrowdRise fundraising and donations are no longer available, US, UK, Australian and Canadian organizations can now use JustGiving for fundraising.


In the **Setup** tab > **Giving** step > :

- **Fundraising** tab, you can configure fundraising via JustGiving:

### Giving

Fundraising

Donations



#### JustGiving event Information

Before you get started, create a JustGiving Event by logging in to your JustGiving Charity account at [www.justgiving.com](http://www.justgiving.com) or by contacting JustGiving at [eventregistration@justgiving.com](mailto:eventregistration@justgiving.com).

Great North Run (3)

September 16, 2001

#### Select a charity

Add one or more charities for participants to choose from during registration.

Add a charity

Delete

	CHARITY NAME	CHARITY REGISTRATION NUMBER	JUSTGIVING CHARITY ID	DESCRIPTION
<input type="checkbox"/>	Save the Children	England and Wales (213890) Scotland (SC039570)	18570	Save the Children exists to help every child reach their full potential. In the UK and around the world, we make sure children stay safe, healthy and keep learning, so they can become who they want to be.

#### Registration form

Enter the copy to be displayed in the fundraising section of the registration form encouraging registrations to fundraise.

Fundraising introduction \*

a charity. All charities listed are registered with JustGiving.  
Max 3000 characters

Fundraising opt-out label \*

Not fundraising

#### Fundraising page defaults

Enter the values to be displayed by default on all JustGiving fundraising pages created for participants through the ACTIVE Works® registration flow.

Default page story

Max 2500 characters

Default image

Edit

Event setup

Event details

Restrictions and settings

Registration categories

Payments and installments

Self-registration team setup

Self-edit setup

Form questions

**Giving**

Additional purchases

Waivers

Emails sent out

ACTIVE.com listing

Activation

Additional links

Event summary

Dashboard

Tools

Preview registration form

Questions?

Help center



- **Donations** tab (only for US-based events in US Dollars), you can configure donations via JustGiving:

## Giving

[Fundraising](#)[Donations](#)

### Select charity

Add one or more charities for participants to choose from during registration.

[Add charity](#)[Delete](#)

	CHARITY NAME	CHARITY REGISTRATION NUMBER	JUSTGIVING CHARITY ID	DESCRIPTION
<input type="checkbox"/>	Save the Children	England and Wales (213890) Scotland (SC039570)	18570	Save the Children exists to help every child reach their full potential. In the UK and around the world, we make sure children stay safe, healthy and keep learning, so they can become who they want to be.

### Registration form options

Enable donations and fundraising on your registration form.

☒ Enable all participants to make donations.

☐ Donations are required

Minimum donation \*

USD

Suggested donation \*

USD

[Event setup](#)[Event details](#)[Restrictions and settings](#)[Registration categories](#)[Payments and installments](#)[Self-registration team setup](#)[Self-edit setup](#)[Form questions](#)**Giving**[Additional purchases](#)[Waivers](#)[Emails sent out](#)[ACTIVE.com listing](#)[Activation](#)[Additional links](#)[Event summary](#)[Dashboard](#)[Tools](#)[Preview registration form](#)[Questions?](#)[Help center](#)

When registering for an event, your customers can select to fundraise for or donate to one of the configured charities:



**GIVING**

**Fundraise**

As a participant of this event, you can fundraise for a charity. All charities listed are registered with [JustGiving](#).

Save the Children

Do you have a **JustGiving** account?

☒ Yes

☐ No

**JustGiving account**

To log into your [JustGiving](#) account and create a fundraising page for this event, please complete the form below. When you submit this form, Active will share the information you enter in this section with JustGiving for to facilitate your fundraising for this event, and otherwise for use in accordance with the [JustGiving Terms of Service](#) and [Privacy Policy](#).

• JustGiving username

@activenetwork.com

• JustGiving password

Stay up to date

☐ Yes, please opt me in to JustGiving emails

**Fundraising setup**

• Your fundraising page

www.justgiving.com/

• Page title

In memory

☐ I'm doing this event in memory of someone

The **Reports** tab > **Fundraising** report includes JustGiving-related transactions. If you create a new event by copying an existing event where fundraising and donations were provided by CrowdRise, then the new event will switch to using JustGiving as the fundraising and donations provider.



## Credit balances

To help your organization retain both customers and funds when canceling registrations, you can now select to refund a canceled order to a credit balance belonging to the customer (a Premium-tier feature). The customer can then spend the credit balance on future registrations or add-on purchases associated with the same remittance account.

When you or your staff cancel and refund an order, you can select between refunding to either the original payment method or to the customer's credit balance (associated with the event's remittance account):

**Review modified items**

Please review the items below. To complete your transaction, click next. ?

**Order ?**

ITEMS	PRICE	QUANTITY	SUBTOTAL
ENDR-43981 - Running-Marathon - Individual Age group/open - Lee Alexander <a href="#">Lee Alexander</a> Registration Id: <a href="#">R-10PT40WLB5L</a>	\$10.00	-1	-\$10.00
Included t-shirt - Extra large	\$0.00	-1	\$0.00
SUBTOTAL:			-\$10.00
CANCELLATION FEE: ?			\$0.00
TOTAL:			-\$10.00

**Refund to**

☐ Original payment method

☒ Credit balance ?

Customers may spend this credit balance on future registrations or add-on purchases for events with the same payment account as this event.

[Back](#) [Cancel](#) [Next](#)

**Note:** Refunding to a credit balance is NOT permitted if:

- The customer did NOT have an ACTIVE account when making the original purchase.
- The registration was made via Front Desk Registration (**Register someone**) or the On-Site app.

Confirmation of a successful cancelation and refund to credit balance is emailed to the customer:



ACTIVE

Dear Lee,

Your payment to dantling\_test\_agency has been refunded.

Order information

Order ID: C-76X5JNBG8SG

Date: June 30, 2020

Item	Price
Cancellation of ENDR-43981 - Running-Marathon - Individual Age group/open	(10.00)
Lee Alexander	
Cancellation fee	0.00
Cancellation of Included t-shirt - Extra large	0.00
Cancellation fee	0.00
Grand total:	(\$ 10.00)
Refund(s) issued:	\$ 10.00
Order balance:	\$ 0.00

Refund information

Amount: \$ 10.00

Refunded to: Credit balance

Credit balance: \$ 10.00

You and your staff can check a customer's available credit balances in the **PEOPLE** tab > a customer > **CREDIT BALANCES** tab:

ACTIVEworks

Welcome Gerry | Help | Settings | Choose logout

HOME

PEOPLE

VOLUNTEER

FINANCIALS

EMAIL

GLOBAL MERCHANDISE

GLOBAL QUESTIONS

GLOBAL DISCOUNT

RACE PASS

DOCUMENT

Lee Alexander

@activenetwork.com

0000000000

EVENTS

EMAILS

VOLUNTEER

RESULTS

CREDIT BALANCES

Second Payment Account

PAYMENT ACCOUNT

\$10.00

CREDIT

During checkout, customers can use a credit balance to pay for their purchase:



- A credit balance can only be used by the customer to pay for purchases associated with the same remittance account as the credit balance (if your organization has 6 events associated with remittance account A and 4 events associated with remittance account B, and you issue a credit balance to a customer for an event associated with remittance account B, then the customer can only spend that credit balance on events associated with remittance account B).
- For an order on a payment plan, a credit balance can only be used to pay for the deposit, not for installments.
- Payment by credit balance is not available if an order results in payment to more than one remittance account (e.g. the order includes a donation, third-party merchandise purchase, USAT membership fee or an event series).
- Credit balances can be used to partially pay for an order in conjunction with a credit card or eCheck payment:

SELECT CATEGORY

COMPLETE FORM

CHECKOUT

## Review cart & check out

### ORDER DETAILS

ITEMS	TOTAL
ENDR-43981 - Running-Marathon - Individual Age group/open Lee Alexander	\$20.00
Included t-shirt - Extra large	\$0.00

Coupon code

APPLY

Subtotal

\$20.00

Processing fee

\$3.00

What's this?

Total

\$23.00

Credit Applied

\$10.00

Amount Due

\$13.00

Active Network, LLC will charge the amount above

CREDIT BALANCE INFORMATION

☒ Apply \$10.00 of your \$10.00 credit balance to this order.

PAYMENT INFORMATION

Please choose a credit card.


\*\*\*\* 1881

01/2021





The order receipt email breaks down the payment by **Payment type** and lists the remaining **Credit balance** available to the customer:



Dear Lee,

Thank you for your order with danting\_test\_agency. Please save a copy of this receipt for your records.

**Order information**

---

Order ID: C-76X5JQSQL92  
Date: July 9, 2020

Item	Price
ENDR-43981 - Running-Marathon - Individual Age group/open	20.00
Lee Alexander	
Included t-shirt - Extra large	0.00
<hr/>	
Subtotal:	\$ 20.00
* Processing fee:	\$ 3.00
Grand total:	\$ 23.00
Amount paid:	(\$ 23.00)
Order balance:	\$ 0.00

**Billing information**

---

Billed to: Lee Alexander  
test address  
test address  
test city, AP 00000  
United States


Amount: \$ 13.00  
Payment type: Visa \*1881

Your card has been charged by Active Network, LLC. This charge will appear as ACT\*danting\_test\_agency on your billing statement.

Amount: \$ 10.00  
Payment type: Credit balance  
Credit balance: \$ 0.00

You and your staff can see if an order was paid using a credit balance in the **Participant** tab > a participant > order ID link > order page:





Order ID: C-76X5JQSQL92  
Order date: 7/9/2020

Amount: \$23.00  
Balance: \$0.00

Actions  
Cancel  
Apply credit

View: | All | [Order summary](#) | [Original order](#) | [Payment information](#) | [Comment](#)

Order summary

ITEMS	PRICE	QUANTITY	SUBTOTAL
ENDR-43981 - Running-Marathon - Individual Age group/open - Lee Alexander	\$20.00	1	\$20.00
Included t-shirt - Extra large	\$0.00	1	\$0.00
SUBTOTAL:			\$20.00
TOTAL:			\$20.00

Original order

ITEMS	PRICE	QUANTITY	SUBTOTAL
ENDR-43981 - Running-Marathon - Individual Age group/open - Lee Alexander	\$20.00	1	\$20.00
<a href="#">Lee Alexander</a>			
Registration Id: R-10PT4QWX9KB			
Included t-shirt - Extra large	\$0.00	1	\$0.00
SUBTOTAL:			\$20.00
PROCESSING FEE:			\$3.00
TOTAL:			\$23.00

Payment Information

DATE	PAYMENT METHOD	BILLING INFORMATION	TYPE	AMOUNT
7/9/2020 10:46 a.m.	Credit balance		Payment (Pending)	\$10.00
7/9/2020 10:46 a.m.	Visa / Visa Electron *****1881	Lee Alexander <a href="#">Contact Information</a>	Payment	\$13.00
TOTAL PAID:				\$13.00

In the following workflows, you and your staff can see payment methods for the original order and the breakdown of refunds to different payment methods (including partial payment by and refund to a credit balance):

- **Participants** tab > a participant >:
  - **Actions** dropdown >:
    - **Cancel** workflow.
    - **Apply credit** workflow.
    - **Transfer to another event** workflow.
    - **Transfer to another category** workflow.
  - **Actions** > **Modify T-shirts and other included items** workflow.
- **Teams** tab > :
  - **Transfer team** workflow.



- **Remove team** workflow.
- **Merge with...** workflow.

Refund review page:

### Review modified items

Please review the items below. To complete your transaction, click next. ?

#### Order ?

ITEMS	PRICE	QUANTITY	SUBTOTAL
CBE08a - Running-1K - Individual 1 - Lee Alexander <a href="#">Lee Alexander</a> Registration Id: R-10PT410QLZY	\$200.00	-1	-\$200.00
Included t-shirt - Large	\$50.00	-1	-\$50.00
G0129c - Medium	\$40.00	-1	-\$40.00
SUBTOTAL:			-\$290.00
CANCELLATION FEE: ?			\$40.00
TOTAL:			-\$250.00

#### Refund to

☒ Original payment method

☐ Credit balance ?

#### Refund payment Information

All refunds are processed in the next remittance cycle. Your agency is responsible for disbursing the refunds of cash, check, Alipay, Wechat, or OXXO.

Payment type:

Credit balance

Payment type:

Credit/Debit Card

ACTIVE.com has charged your card for your order. The order will appear as A1234 on your billing statement.

Card type: MasterCard / Maestro

Card number: \*\*\*\*\*4444



## Refund complete page:

### Order successfully canceled

#### Order Information

Order ID: C-76X5K7T6YLS

Order date: Tuesday, August 25, 2020

Order amount: -\$250.00

#### Order modifications

Modified items

C-76X5K7T6YLS 8/25/2020 10:27 a.m.	Canceled - CBE08a - Running-1K - Individual 1 - Lee Alexander Refunded \$200.00 of \$213.25	-\$200.00
	Canceled - Included t-shirt - Large Refunded \$50.00 of \$53.38	-\$50.00
	Canceled - G0129c - Medium Refunded \$0.00 of \$42.70	\$0.00
SUBTOTAL:		-\$250.00
TOTAL:		-\$250.00

#### Original order

ITEMS	PRICE	QUANTITY	SUBTOTAL
CBE08a - Running-1K - Individual 1 - Lee Alexander Lee Alexander Registration Id: R-10PT410QLZY	\$200.00	1	\$200.00
Included t-shirt - Large	\$50.00	1	\$50.00
G0129c - Medium	\$40.00	1	\$40.00
SUBTOTAL:			\$290.00
PROCESSING FEE:			\$19.33
TOTAL:			\$309.33

#### Payment Information

Amount:	\$190.67
Payment type:	Credit balance

Amount:	\$59.33
Payment type:	Credit/Debit Card

ACTIVE.com has changed your card for your order. The order will appear as A1234 on your billing statement.

Card type: MasterCard / Maestro

Card number: \*\*\*\*\*4444



## Refund email sent to the customer:

Dear Lee,

Your payment to A1234 has been refunded.

**Order information**

Order ID: C-76X5K7T6YLS  
Date: August 25, 2020

Item	Price
Cancellation of CBE08a - Running-1K - Individual 1	(200.00)
Lee Alexander	
Cancellation fee	0.00
Cancellation of Included t-shirt - Large	(50.00)
Cancellation fee	0.00
Cancellation of G0129c - Medium	(40.00)
Cancellation fee	40.00
Grand total:	(\$ 250.00)
Refund(s) issued:	\$ 250.00
Order balance:	\$ 0.00

**Refund information**

Amount: \$ 190.67  
Refunded to: Credit balance  
Credit balance: \$ 190.67  
Amount: \$ 59.33  
Refunded to: MasterCard \*4444  
This refund will appear as ACT\*A1234 on your billing statement.

In the **FINANCIALS** tab > **Credit Balance** report, you and your treasurer can keep track of customers with credit balances and credit balance transactions:

- **Summary report** of customers who have credit balances:


	A	B	C	D	E	F	G
1	First name	Last name	Email	Credit balance	Currency	Credit creation date	Agency payment account
2	Gerry	Active2	@activenetwork.com	14.1	USD	6/17/2020	danting_test_agency
3	Gerry	Active2	@activenetwork.com	12	USD	6/18/2020	3 remittance account
4	Danting	Deng	@activenetwork.com	28.9	USD	6/18/2020	3 remittance account
5	Gerry	Active2	@activenetwork.com	0	HKD	6/22/2020	HKD account
6	Danting	Deng	@activenetwork.com	0	USD	6/22/2020	Second Payment Account
7	dengdanting5	test	@163.com	22	USD	6/22/2020	Second Payment Account
8	Gerry	Active2	@activenetwork.com	48.35	USD	6/22/2020	Second Payment Account
9	first	last	@ive.com	2	USD	6/24/2020	3 remittance account
10	Danting	Deng	@activenetwork.com	6.05	USD	6/24/2020	danting_test_agency
11	Lee	Alexander	@activenetwork.com	0	USD	6/30/2020	Second Payment Account



- **Detailed report** of transactions which created or consumed credit balances:

	A	B	C	D	E	F	G
1	First name	Last name	Email	Credit balance used/received	Currency	Transaction date	Agency payment account
2	Gerry	Active2	ictivenetwork.com	8 USD		6/17/2020	danting_test_agency
3	Gerry	Active2	ictivenetwork.com	6 USD		6/18/2020	3 remittance account
4	Gerry	Active2	ictivenetwork.com	1 USD		6/18/2020	3 remittance account
5	Gerry	Active2	ictivenetwork.com	1 USD		6/18/2020	danting_test_agency
6	Danting	Deng	@activenetwork.com	3 USD		6/18/2020	3 remittance account
7	Gerry	Active2	ictivenetwork.com	110 USD		6/18/2020	danting_test_agency
8	Danting	Deng	@activenetwork.com	22 USD		6/18/2020	3 remittance account
9	Danting	Deng	@activenetwork.com	-13.95 USD		6/18/2020	3 remittance account
10	Gerry	Active2	ictivenetwork.com	2 HKD		6/22/2020	HKD account
11	Gerry	Active2	ictivenetwork.com	5 USD		6/22/2020	danting_test_agency
12	Gerry	Active2	ictivenetwork.com	-10 USD		6/22/2020	danting_test_agency

In the **My Events** site, your customers can see for themselves if an order was paid using a credit balance:

English (United States) ▾

**Order Receipt**

Order ID: C-76X5JQSQL92

Payment Status: APPROVED

Order Date: 7/9/2020 10:46 a.m.

Order Amount: \$23.00

Order Balance: \$0.00

Items	Item Price	Quantity	Total
ENDR-43981 - Running-Marathon - Individual Age group/open Lee Alexander	\$20.00	1	\$20.00
Included t-shirt - Extra large	\$0.00	1	\$0.00
Sub Total			\$20.00
Processing Fee			\$3.00
Total			\$23.00

**Related Registrations**  
Running-Marathon - Individual Age group/open [View Registration](#)

**Payment Information**  
Amount: \$13.00  
Payment Method: Credit Card  
Card Number: \*\*\*\* \* 1881  
Status: Approved

Amount: \$10.00  
Payment Method: Credit Balance  
Status: Approved



## **ACTIVE Network, LLC**

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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).

ACTIVE Network, LLC

717 North Harwood Street

Suite 2500

Dallas, TX 75201