



Product Release Notes for ACTIVEWorks – July 19, 2023

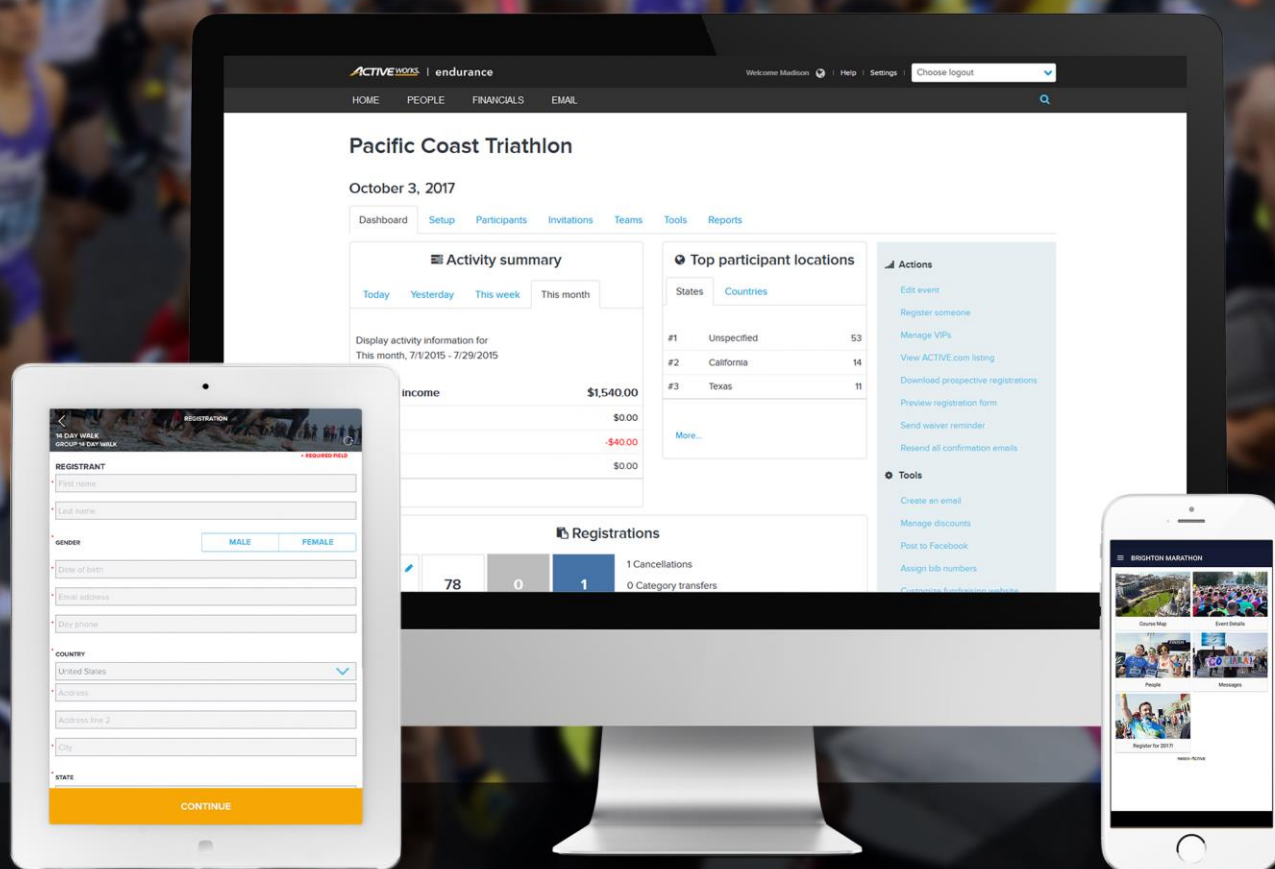


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New Giving Module


The **Event setup** > **Giving** module has been completely redesigned for greater flexibility and to provide compelling fundraising and donation options to your customers:

- Setup all your charities, fundraising and donations on a single page.
- Differentiate your charities by tier to reflect your organization's relationship with each charity.
- Display your charities to your customers as large, medium or small image slideshows or listed in tables or dropdowns.
- Drag-and-drop the order in which your tiers and charities are displayed to your customers.

Giving

Online fundraising platforms

Before connecting to a fundraising event, please ensure that the fundraising event exists on the fundraising platform. You can submit your fundraising event to a fundraising platform via your charity account. If you are not a charity, then please contact the fundraising platform.

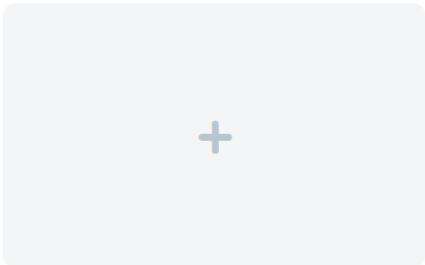
PLATFORM	FUNDRAISING EVENT
 JustGiving	+ Connect to fundraising event ?

Charities [Add tier](#)

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

Default tier

Display as: Image grid (Large) Random off



Donation settings

Enable donations on your registration form.

Minimum amount *

0.00 AUD

Fast donation amount *

0.00 AUD

[+ Add fast donation amount](#)

☐ Donations are mandatory

[Back](#) [Save & continue](#)

Event setup

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Giving

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Activation

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Dashboard

Tools

Preview registration form

Questions?

Help center



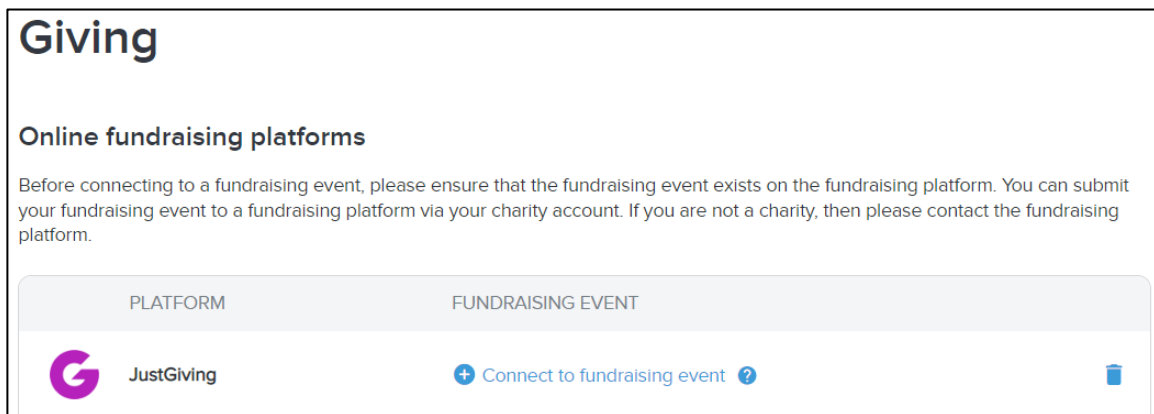
Connecting to a JustGiving fundraising event

We're thrilled to offer the opportunity to link your Giving event to a JustGiving fundraiser! Your customers can create a personalized fundraising page for a cause they're passionate about and invite their friends and family to donate.

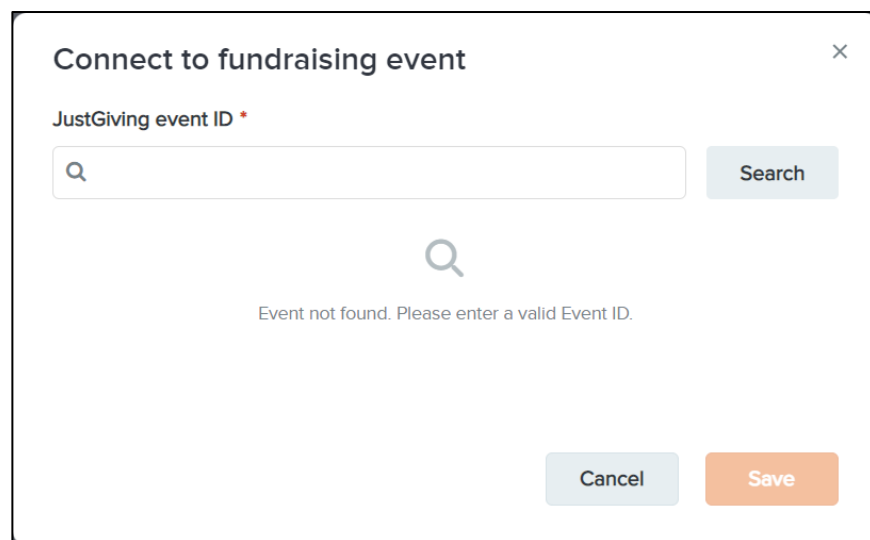
To ensure a seamless connection, please confirm that the fundraiser exists on the JustGiving platform and obtain its unique ID number. Together, we can make a positive impact and support meaningful causes.


To connect to a JustGiving fundraising event:

1. Click the **+ Connect to fundraising event** link:



2. Search for a fundraising event by entering the fundraising event ID and then click **Save**.







3. To configure the **Fundraising page settings**, click the  icon:



Giving

Online fundraising platforms

Before connecting to a fundraising event, please ensure that the fundraising event exists on the fundraising platform. You can submit your fundraising event to a fundraising platform via your charity account. If you are not a charity, then please contact the fundraising platform.

PLATFORM	FUNDRAISING EVENT
 JUSTGIVING	London Marathon   Apr 21, 2001 - Jun 21, 2001 Unspecified location 

Fundraising page settings



London Marathon

Apr 21, 2001 - Jun 21, 2001 | Unspecified location

The 2001 Flora London Marathon on the 22nd of April 2001 aims to raise over £25 million for charity. Three-quarters of the runners now raise money for some 700 charities. The race will be started by Sir Steven Redgrave, who will be running with his wife to raise funds for his newly-formed Charitable...

Registration form

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

Fundraising introduction *

Start your fundraising journey today with the selected charity. Your personal fundraising page with the JUSTGIVING will be created at the end of this registration.

163/3,000 characters

Fundraising opt-out label *

Not fundraising

Fundraising page defaults

Enter the default values your fundraiser will see when they create their fundraising page. They will be able to edit these if desired on the JUSTGIVING.

Image



Page story

0/2,500 characters

Video



Fundraising target

Unlimited

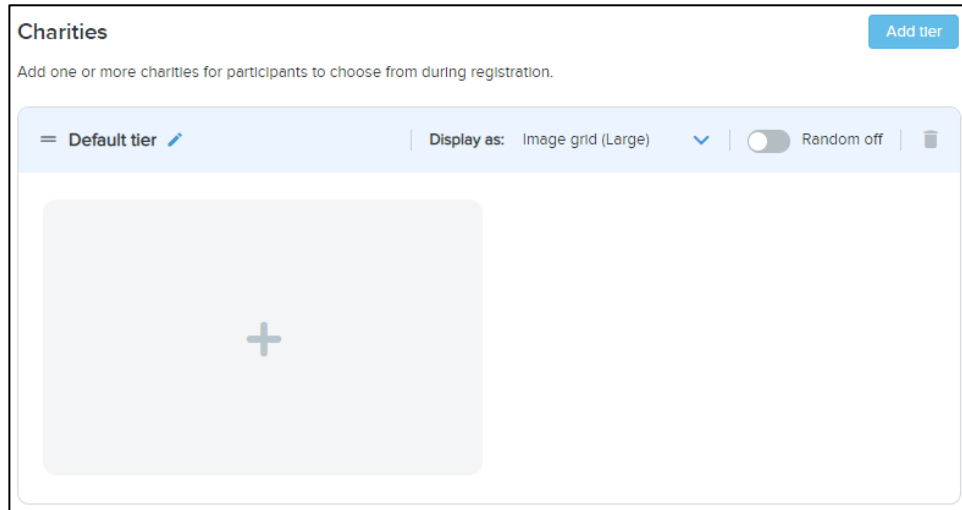
Cancel

Save




Adding charities

In the **Charities** section, you can add and organize charities by tiers. When your customers register, they can choose which charities they want to fundraise for or donate to:



To add a charity tier:

1. Click the **Add tier** button.
2. Edit the charity **Tier name** by clicking the  icon.
3. Select how you want to display charities to consumers from the **Display as** dropdown:
 - **Image grid (Large)**
 - **Image grid (Medium)**
 - **Image grid (Small)**
 - **Text list**
 - **Text dropdown**
4. To display charities to your customers in:
 - The configured order, turn on the **Random off** switch.
 - Random order, turn off the **Random off** switch.

To delete a charity tier and its charities, click the corresponding  icon.

To add a charity to a charity tier:

1. In the required tier, click either the **+** icon or the **+Add charity** link.







Add charity

×

JustGiving

312331312

Search

	CHARITY	REGISTERED NO.	CHARITY ID
<input checked="" type="radio"/>	 justgiving-charity1	11-1111111	111
<input type="radio"/>	 justgiving-charity2	11-1111112	222
<input type="radio"/>	 justgiving-charity3	11-1111113	333
<input type="radio"/>	 justgiving-charity4	11-1111114	444
<input type="radio"/>	 justgiving-charity5	11-1111115	555
<input type="radio"/>	 justgiving-charity6	11-1111116	666

<

1

2

>


Cancel

Continue

- In the **Add charity** popup:
 - Filter the listed charities by charity platform by selecting the required charity platform icon.
 - Search for a charity by entering its name or registration number in the **Search** box.
- Select the required charity and then click the **Continue** button.

Add charity

×

 1 Heart 1 Mission (465343112)

Charity tier *

New tier

Enable to

☒ Fundraise

i

☒ Donate

Description

0/2,500 characters

Images

i

No images for this charity yet.

Upload

Back

Cancel

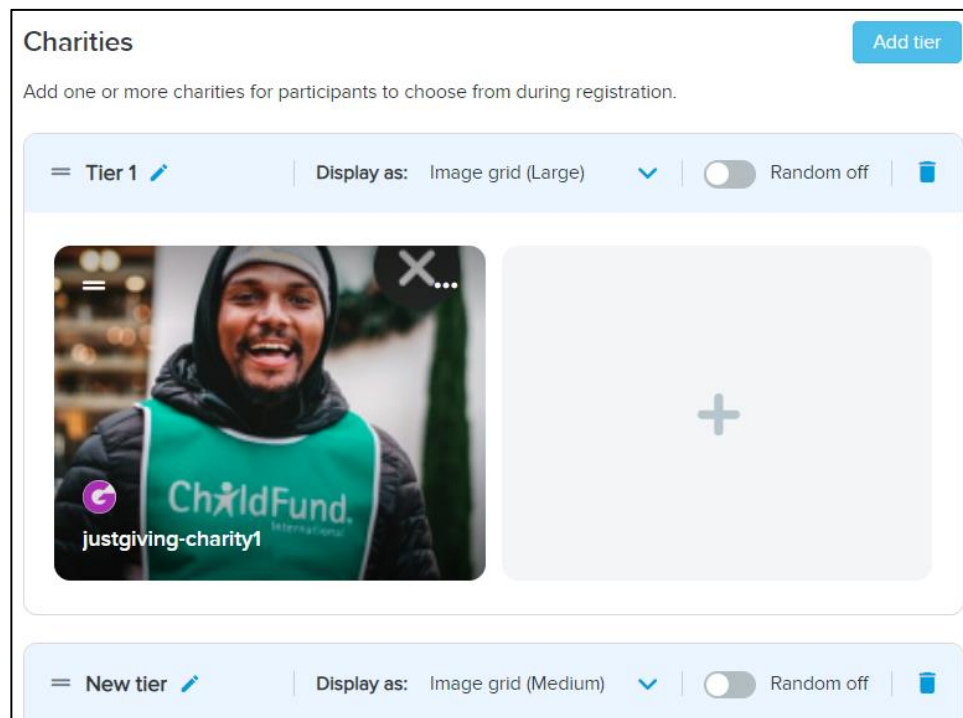
Save



4. Verify or change the **Charity tier** as required.
5. To enable fundraising and/or donations for this charity, switch on the **Enable to > Fundraise** and/or **Donate** switches.
6. Enter a **Description** for the charity.
7. Upload up to 6 images for the charity (which will be displayed to consumers during registration) by clicking the **Images > Upload** button.
8. Click the **Save** button.

After adding a charity to a charity tier:

- To change the order in which the charities in a charity tier are listed (if the tier is not configured for random ordering), click-and-drag a charity's **=** icon.
- To edit a charity, click the charity's **...** > icon.
- To delete a charity from the charity tier, click the charity's **...** > **x** icon.



Configuring donations

To increase donations during registration, you have the option to add up to four quick donation buttons that offer **Fast donation amounts** in the currency of your event. For example, you can offer donations such as \$5, \$10, \$25, and \$40, or \$2, \$5, \$10, and \$15.

It's essential to select amounts that will encourage registrants to donate. Additionally, registrants have the option to enter a custom amount if they choose. You can also set a minimum donation amount, such as \$5.



Donation settings

Enable donations on your registration form.

Minimum amount *

Fast donation amount *

Add fast donation amount

☒ Donations are mandatory

Giving configuration summary

An event's giving configuration is summarized in the **HOME** tab > **Your events** tab > the **EVENT** > **Setup** tab > **Event summary** > **Settings** panel:

ACTIVEWORKS

power up

Welcome camps1 | Help | Settings | Choose logout

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

Test giving event

March 9, 2000

Dashboard Setup Participants Invitations Teams Tools Reports Express registrations Virtual race

Event overview

Event setup

Test giving event

3/9/2000 - 3/9/2088


Building 468

1 Main Street

5-93182-0001

ACTIVE.com

ACTIVE.com listing



Here's your unique QR code, which links to your ACTIVE.com listing. Click the image to download or view a larger version.

Event setup

Event summary

Event details

Restrictions and settings

Registration categories

Triathlon-Super Sprint

Individual Age group/open

\$1.00

Triathlon-Sprint

Individual Age group/open

\$1.00

Settings

Giving - Donations and fundraising enabled

15 charities selected

Additional purchases - 1 item

Waivers - 0 waivers

Confirmation email - Custom email

Activate form - Registration is activated

ACTIVE.com listing

Activation



Consumer registration flow


During the registration process, your customers will be presented with a giving section that is more engaging and user-friendly, based on your configuration:

Desktop:

Select a charity *

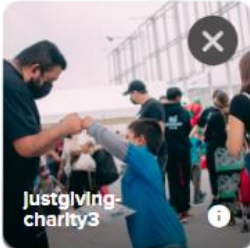
Please select a charity you want to fundraise/donation.

Tier 1




justgiving-charity1

New tier



justgiving-charity3



justgiving-charity9

Tier 3

justgiving-charity8

justgiving-charity7

Tier 4


Please select

Mobile:

Select a charity *

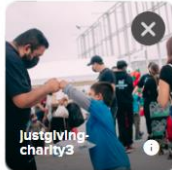
Please select a charity you want to fundraise/donation.

Tier 1




justgiving-charity1

New tier



justgiving-charity3



justgiving-charity9

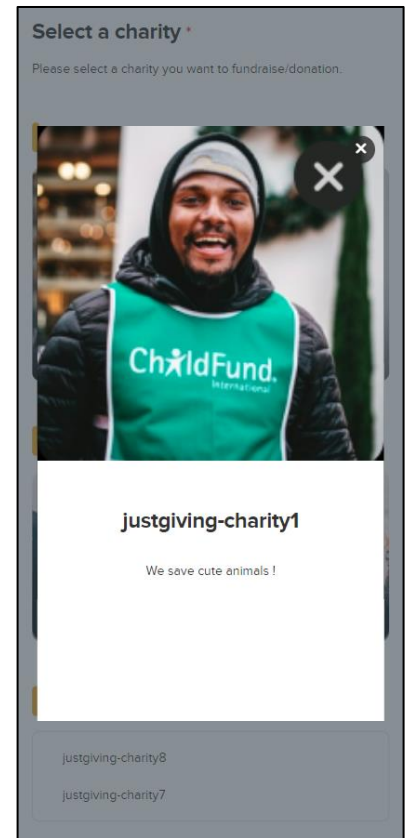
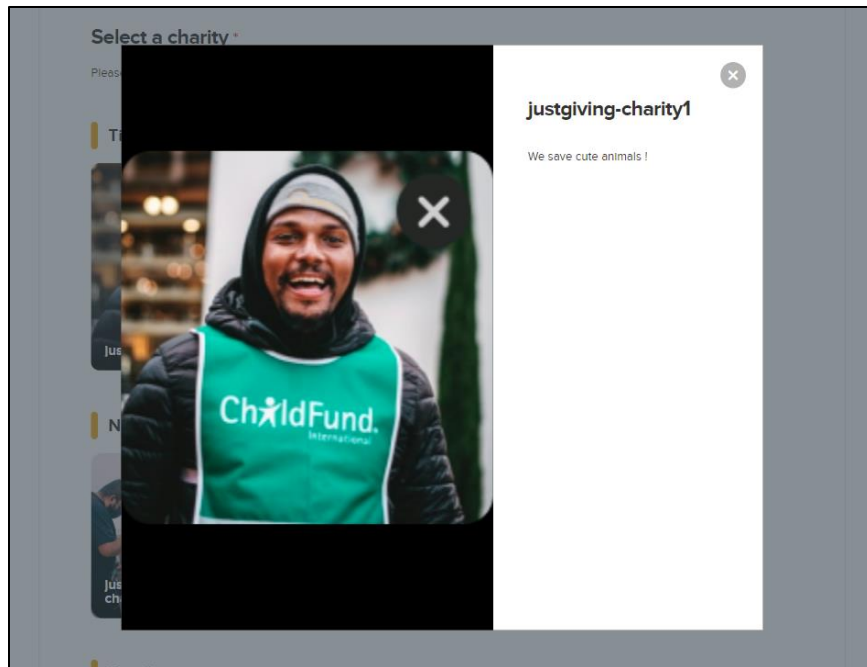
Tier 3

justgiving-charity8

justgiving-charity7

Tier 4


Please select



Customers can click/tap a charity of their choice and then enter their fundraising details or make a donation:



Desktop:



justgiving-charity1

Change charity

Fundraise

Start your fundraising journey today with the selected charity. Your personal fundraising page with the JUSTGIVING will be created at the end of this registration.

Fundraise for
London Marathon (1)

Fundraising target amount
--

☒ Fundraising

☐ Not fundraising

Personal information

Email address *

First name *

Last name *

Country *

Please select

Fundraising setup

Your fundraising page *

http://www.justgiving.com

Page title *

Make a donation

Donation amount

\$10.00


\$20.00

\$50.00

\$ Other amount

\$10.00 is the minimum donation. All donations are tax-deductible. [i](#)

Mobile:



justgiving-charity1

Change charity

Fundraise

Start your fundraising Journey today with the selected charity. Your personal fundraising page with the JUSTGIVING will be created at the end of this registration.

Fundraise for
London Marathon (1)

Fundraising target amount
--

☒ Fundraising

☐ Not fundraising

Personal information

Email address *

First name *

Last name *

Country *



Fundraising setup

Your fundraising page *

Page title *

Make a donation

Donation amount

\$10.00 is the minimum donation. All donations are tax-deductible. ⓘ

After your customers finish registering for fundraising, they will receive a **Registration Confirmation** email that includes a **Fundraising** section. This section has a button that they can click to open the fundraising platform site:

Registration Confirmation

Dear John Doe,

You are registered for Mega Marathon - Individual Age group/open.

Mega Marathon
help@mega-marathon.com

Fundraising

To claim your fundraising page, please click on the following link to be redirected to our online fundraising partner. From there, you can either sign up or log in to claim your page.
Alternatively, you can visit MyEvents to claim your fundraising page.

[Claim your page](#)



My Events

Your customers can monitor their fundraising progress through their personal **My Events** page.

- To open their fundraising page, your customers can click the **View** button.

The screenshot shows the 'MY EVENTS' interface. At the top, there's a header with the 'MY EVENTS' title and a 'Credit balance' dropdown. Below this, a filter 'Display : Current events' and a sort option 'Sort by : Date ↑' are visible. The main event card is titled 'FUNDRAISING TEST EVENT' with an 'INDIVIDUAL' tag. It lists the user 'John Doe', the event 'Running-1K - Individual Age group/open', the dates 'March 8, 2000 - March 9, 2026', and the location '1 Test building, Test street, Test city, AE - Armed Forces Europe, 92182-0001'. There are two buttons: 'Registration & QR code' and 'Group packet pickup'. A red box highlights a 'FUNDRAISING' summary card. This card includes a 'View' button, a purple 'G' icon, the event name 'Fundraising test event', and a progress indicator showing 'USD 2,625 Raised' (131%) out of a 'USD 2,000 Goal'.

Category	Value
Raised	USD 2,625
Goal	USD 2,000
Progress	131%

Reports

You and your team can download fundraising information at the:

- Organization level as a .csv file on the **FINANCIALS** tab > **Fundraising** report page by selecting the required **Dates** and then clicking the **Download** button:



ACTIVEworks

power up

Welcome Jack | Help | Settings | Choose logout

HOME

PEOPLE

VOLUNTEER

FINANCIALS

EMAIL

GLOBAL MERCHANDISE

GLOBAL QUESTIONS

GLOBAL DISCOUNT

RACE PASS

DOCUMENT

Financials

View and download from financial reports for your organization.

Revenue report

View a list of payments from Active and transactions by participants for your organization.

Remittance Report

View a list of payments from Active and transactions by participants for your organization.

Fundraising report

Details fundraising information, including number of fundraisers, charities and amounts raised.

Fundraising report

To view report details, download the report. All times displayed in reports reflect Greenwich Mean Time (GMT).

Dates

Custom date range

Start 1/1/2023 End 7/9/2023

Today (7/10/2023)

Yesterday (7/9/2023)

This week (7/10/2023)

This month (7/1/2023 - 7/10/2023)

This year (1/1/2023 - 7/10/2023)

Last year (2022)

Payment period

Custom date range

Back

Download

Download Fundraising Report - 7/10/2023

Please note that data synchronization may result in a delay of up to 6 hours.

This file opens in your browser (CSV format).

	A	B	C	D	E
1	Registration first name	Registration last name	Registration ID	Event name	Fundraising page owner
2	John	Doe	R-0N3K8D5N	2023 Giving Test Event	Homer Simpson
3	Jane	Doe	R-0NF85M2K	2023 Giving Test Event	Marge Simpson
4	Jack	Doe	R-0NG8C5L2	2023 Giving Test Event	Bart Simpson
5	Jennifer	Doe	R-0NJ5G7B4	2023 Giving Test Event	Lisa Simpson

F	G	H	I	J
Fundraising event	Fundraising target	Total raised	Title	Page url
Test Fundraising Event	0	1800.41	Test fundraiser 1	https://www.justgiving.com/hsimpson
Test Fundraising Event	350	0	Test fundraiser 2	https://www.justgiving.com/msimpson
Test Fundraising Event	500	855	Test fundraiser 3	https://www.justgiving.com/bsimpson
Test Fundraising Event	500	556.35	Test fundraiser 4	https://www.justgiving.com/lsimpson



- Event level as a .csv file on the **HOME** tab > **EVENT** > an event > **Reports** tab > **Fundraising** report page by clicking the **Download** button:

	A	B	C	D	E
1	Registration first name	Registration last name	Registration ID	Event name	Fundraising page owner
2	John	Doe	R-0N3K8D5N	2023 Giving Test Event	Homer Simpson
3	Jane	Doe	R-0NF85M2K	2023 Giving Test Event	Marge Simpson
4	Jack	Doe	R-0NG8C5L2	2023 Giving Test Event	Bart Simpson
5	Jennifer	Doe	R-0NJ5G7B4	2023 Giving Test Event	Lisa Simpson

F	G	H	I	J
Fundraising event	Fundraising target	Total raised	Title	Page url
Test Fundraising Event	0	1800.41	Test fundraiser 1	https://www.justgiving.com/hsimpson
Test Fundraising Event	350	0	Test fundraiser 2	https://www.justgiving.com/msimpson
Test Fundraising Event	500	855	Test fundraiser 3	https://www.justgiving.com/bsimpson
Test Fundraising Event	500	556.35	Test fundraiser 4	https://www.justgiving.com/lsimpson

You and your team can download donation information at the:

- Organization level as a .csv file on the **FINANCIALS** tab > **Donations** report page by selecting the required **Dates** and then clicking the **Download** button:



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

Financials

View and download from financial reports for your organization.

[Revenue report](#)
View a list of payments from Active and transactions by participants for your organization.

[Express registration report](#)
View how many participants choose Express registration, and if they are complete, in events where it is enabled.

[Donations](#)
Provide a list of your event's donations.


[Charge back report](#)
View a list of charge back transactions.

Donations report

To view report details, download the report. All times displayed in reports reflect Greenwich Mean Time (GMT).

Dates This week (6/12/2023 - 6/16/2023) ▾

[Back](#) [Download](#)

[Donations report - 6/16/2023](#)

Data may be delayed by up to 30 minutes.

This file opens in your browser (CSV format).

	A	B	C	D	E	F	G	H
1	Donation platform	Date	Donation amount	Currency	Remittance amount	Donated to	Check number	Event name
2	JUSTGIVING	6/13/2023 5:42	10	USD	9.65	justgiving-charity1		2023 IRONMAN
3	JUSTGIVING	6/13/2023 16:36	10	USD	9.65	justgiving-charity1		2023 IRONMAN
4	JUSTGIVING	6/13/2023 18:40	10	USD	9.65	justgiving-charity1		2023 IRONMAN
5	JUSTGIVING	6/13/2023 18:46	10	USD	9.65	justgiving-charity2		2023 IRONMAN
6	JUSTGIVING	6/15/2023 19:22	10	USD	9.65	justgiving-charity1		2023 IRONMAN
7	JUSTGIVING	6/15/2023 19:35	10	USD	9.65	justgiving-charity1		2023 IRONMAN

I	J	K	L	M	N	O	P	Q	R	S
Event ID	Donor name	Email	Street Address	City	State	ZIP code	Country	Gift Aid Clarification	Gift Aid Waiver1	Gift Aid Waiver2
E-00V52Y99	John Doe	alexander	Test	Test	AP	11111	United States	FALSE		
E-00V52Y99	Jane Doe	cfcf@v.co	123	irving	TX	75063	United States	FALSE		
E-00V52Y99	Jane Doe	cfcf@v.co	123	irving	TX	75063	United States	FALSE		
E-00V52Y99	Jane Doe	cfcf@v.co	123	irving	TX	75063	United States	FALSE		
E-00V52Y99	Jack Doe	gvg@g.co	123	irving	TX	75063	United States	FALSE		
E-00V52Y99	Jack Doe	gvg@g.co	123	irving	TX	75063	United States	FALSE		

- Event level as a .csv file on the **HOME** tab > **EVENT** > an event > **Reports** tab > **Donation** report page by clicking the **Download** button:



HOMEPEOPLEVOLUNTEERFINANCIALSEMAILGLOBAL MERCHANDISEGLOBAL QUESTIONS

GLOBAL DISCOUNTRACE PASSDOCUMENT

2023 New Giving Event

January 1, 2024

DashboardSetupParticipantsInvitationsTeamsToolsReportsExpress registrationsVirtual race

Revenue report

Provides a list of all payments and transactions, including summaries for total net income, refunds and processing fees.

Discounts

Provides a list of all discounts that have been used during registration. Referral rebates are also counted as discounts and categorized into this report.

Donation

Details of donation, including donors, charities and amounts.

Transfer report

Provides a list of registration transferred between events or price types.

Donation report - 2023 New Giving Event

To view report details, download the report. All times displayed in reports reflect Greenwich Mean Time (GMT).

BackViewDownload

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DONATIONS

Event charities

CHARITY	ONLINE DONATIONS	CURRENCY	AMOUNT
justgiving-charity1	20	USD	240
justgiving-charity2	2	USD	20
justgiving-charity3	3	USD	40
justgiving-charity7	1	USD	10
justgiving-charity8	0	USD	0
justgiving-charity9	0	USD	0
Spotting Cancer	23	USD	280

Data may be delayed by up to 30 minutes.

	A	B	C	D	E
1	Participant name	Charity name	Donation platform	Donation amount	Currency
2	May yin	justgiving-charity1	JUSTGIVING	10	USD
3	May yin	justgiving-charity1	JUSTGIVING	10	USD
4	May yin	justgiving-charity1	JUSTGIVING	10	USD
5	May yin	justgiving-charity1	JUSTGIVING	10	USD
6	May yin	justgiving-charity1	JUSTGIVING	10	USD
7	mec stepsix	justgiving-charity1	JUSTGIVING	10	USD
8	someonee elsee	justgiving-charity1	JUSTGIVING	10	USD
9	zoe ma	justgiving-charity1	JUSTGIVING	10	USD
10	Jesse Pi	justgiving-charity1	JUSTGIVING	10	USD
11	Praveen Chowdar	justgiving-charity1	JUSTGIVING	10	USD