



Product Release Notes for ACTIVEWorks – January 10, 2024

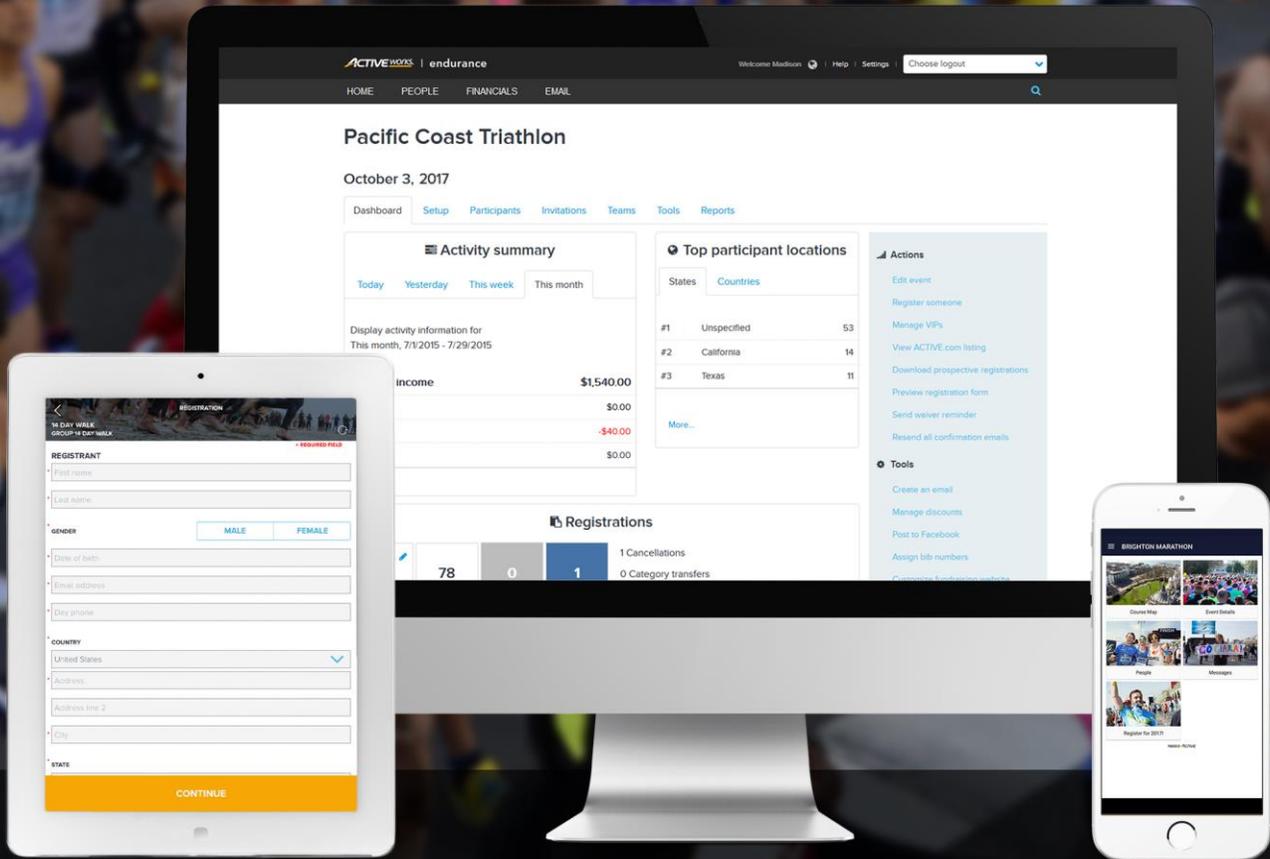


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Team management

Event directors can now provide team captains with a selection of multiple team types (such as tiered or corporate team types) and the option of either pre-paying registration fees for their team members or paying registration fees later after team members register.

If an event is configured with the **Setup > Registration Categories > a category > a price type > Allow self-registration teams** checkbox selected, then on the **Setup > Self-registration team setup step > Team payment settings** section, event directors can now select to:

- **Allow team captains to pre-pay for team members** and then select to:
 - **Enable pre-pay options for:**
 - **Team captains**
 - **Event organizers**
 - **Both event organizers and team captains**
 - **Allow pre-pay for different price categories**
- **Allow team captains to pay later for team members** and then configure the **Reminder date for team payment** as:
 - A number of **days before event starts**
 - A number of **days after team creation**
 - On a specified date



ACTIVEWORKS power up Welcome Jack | [Help](#) | [Settings](#) | [Choose logout](#)

[HOME](#) [PEOPLE](#) [VOLUNTEER](#) [FINANCIALS](#) [EMAIL](#) [GLOBAL MERCHANDISE](#) [SEARCH](#)

[GLOBAL QUESTIONS](#) [GLOBAL DISCOUNT](#) [RACE PASS](#) [DOCUMENT](#)

Self-registration team setup

Self-registration teams were selected for one or more categories for this event. Set up the details below.

Self-registration teams enable a team captain to create a team, and each team member to register themselves. Examples: Corporate teams, community teams, fundraising teams.

Team payment settings

Configure the ability for team captains to pay in advance for their team members during team creation, or pay later for their team members after registration. If no option is selected, team captains and members will only be allowed to pay for themselves when they register.

Allow team captains to pre-pay for team members
Allow team captains to pay in advance for members when setting up their teams. Captains will be able to send out pre-paid ticket invites as well as normal invites.

Enable pre-pay options for

- Team captains
- Event organizers
- Both event organizers and team captains

Pre-pay settings Allow pre-pay for different price categories

Allow team captains to pay later for team members
Allow team captains to pay for their members after registration. Captains will be able to set up the number of pay-later registrations during team creation, and send out pay-later ticket invites as well as normal invites. This can be enabled/disabled for each team type you add below. [?](#)

Reminder date for team payment *

- 7 day(s) before event starts
- 1 day(s) after team creation
- M/d/yyyy

Event setup

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

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If **Allow team captains to pay later for team members** is:

- Switched off, then event directors can configure the **Team creation settings** which control whether team captains can create public/hidden (join by invitation email only) teams and if a password is required to join a team:



Team payment settings

Configure the ability for team captains to pay in advance for their team members during team creation, or pay later for their team members after registration. If no option is selected, payment will be made at the time of registration.

Allow team captains to pre-pay for team members
Allow team captains to pay in advance for members when setting up their teams. Captains will be able to send out pre-paid registration invites and invite members to pay on their own.

Allow team captains to pay later for team members
Allow team captains to pay for their team after registration. Captains will be able to decide which members they will pay for. This option can be enabled/disabled for each team type you add below. ⓘ

Team creation settings

Allow captains to create

Public team only

A public team or a hidden team

When captains create a public team

No password is required for team registration

Password is optional for team registration

Password is required for team registration

ⓘ **NOTE:** When captains choose to pay later for members, password would be REQUIRED for public team registration.

Additional settings Enable general team invite on My Events

- Self-registration team setup
- MyEvents 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

- Switched on, then the **Team creation settings** cannot be changed by event directors:

Allow team captains to pay later for team members
Allow team captains to pay for their team after registration. Captains will be able to decide which members they will pay for. This option can be enabled/disabled for each team type you add below. ⓘ

Reminder date for team payment

7 day(s) before event starts

1 day(s) after team creation

M/d/yyyy

Team creation settings

Allow captains to create

Public team only

A public team or a hidden team

When captains create a public team

No password is required for team registration

Password is optional for team registration

Password is required for team registration

ⓘ **NOTE:** When captains choose to pay later for members, password would be REQUIRED for public team registration.

Additional settings Enable general team invite on My Events

- Emails sent out
- ACTIVE.com listing
- Activation
- Additional links
- Event summary
- Dashboard
- Tools
- Preview registration form
- Questions?
- Help center

Event directors can then create multiple team types in the **Team settings** section by clicking the **Add team type** button and then:

- Edit the team type name by clicking the **General Team** > icon.
- Selecting if the team type is to **Allow team to pay later** (this option is displayed only if the **Team payment settings** > **Allow team captains to pay later for team members** switch is enabled).



3. Entering the team type **Description**.
4. Configuring the **Team creation dates** and **Team join dates**.
5. Configuring the team **Price settings**.

Team settings

Create single or multiple team types for captains to choose from, including corporate teams or tiered team packages.

[Add team type](#)

General Team

Registration options

Description

Team creation dates –

Team join dates –

Price settings

Team creation fee * AUD
If you enter a team creation fee, post-registration team creation will be disabled.

GL code

Team member discount Percentage

Note: If a non-zero **Team creation fee** is configured, then post-registration team creation is NOT allowed.

During registration, team captains creating a team can select the **Team type**:



TEAM INFO

* Do you want to join or create a team?

No

Join a team

Create a team

Create team

Team members register themselves. As the team captain, you can use the team captain center to manage and invite team members.

* Team type Free

General team

Team type1 \$10.00

* Team name

Team description

Payment for team member

All members pay for themselves
All team members should pay for themselves during registration

I will pay later
You can pay for some or all of your invited team member registrations

I will pay in advance
You can pay for some or all of your invited members in advance of their registration

Is this team hidden?

No - anyone can see the team when registering

Hide team from all registrants

Is this a private team?

No - anyone can join

Yes - require a password

* Team password

Team captains can then select how to pay for team members' registrations from **Payment for team member** > :

- **All members pay for themselves.**
- **I will pay later** and then:
 - **Set maximum limit of registrations you are willing to pay for**
 - **Set Is this team hidden?** and if **No**, then set the password to join the team.



Payment for team member

All members pay for themselves
All team members should pay for themselves during registration

I will pay later
You can pay for some or all of your invited team member registrations

Set maximum limit of registrations you are willing to pay for

Maximum available team size: 500

I will pay in advance
You can pay for some or all of your invited members in advance of their registration

Is this team hidden?

No - anyone can see the team when registering

Set password for registrants to join the team

Hide team from all registrants

- **I will pay in advance** and then:
 - Set the maximum number of team **MEMBERS** in each price **CATEGORY** that you are willing to pay for.
 - Send invitation emails to team members by clicking the **INVITE NOW** button.
 - Set **Is this team hidden?**
 - Set **Is this a private team?** and if **Yes**, then then set the **Team password** to join the team.



Payment for team member

- All members pay for themselves
All team members should pay for themselves during registration
- I will pay later
You can pay for some or all of your invited team member registrations
- I will pay in advance
You can pay for some or all of your invited members in advance of their registration

CATEGORY	PRICE	MEMBER	SUBTOTAL	
Running-Marathon - Individual Age group/open	\$0.00	<input type="text" value="0"/>	\$0.00	INVITE NOW
Running-Marathon - Individual Age group/open	\$1.00	<input type="text" value="0"/>	\$0.00	INVITE NOW
Running-Marathon - Individual Age group/open	\$1.00	<input type="text" value="0"/>	\$0.00	INVITE NOW
TOTAL			\$0.00	

Is this team hidden?

- No - anyone can see the team when registering
- Hide team from all registrants

Is this a private team?

- No - anyone can join
- Yes - require a password

* Team password

Payment for team member All members pay for themselves

Invite team member via email

Input email addresses

Separate email addresses using a comma or semicolon

You could also invite more members in "MyEvents" after your registration.

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

In the Front Desk Registration workflow, event directors registering a team captain can **Create a team** and select a **Team type**:



Do you want to participate with a team?

No

Create a team

Join a team

Create a team where team members register on their own. Team captain can use the team captain center to manage and invite team members.

Team type * Company team - \$10.00

Team name *

Team description

Is this a private team?

No - anyone can join when registering

Require password to join team

Enter password *

Is this a hidden team?

No - anyone can see the team when registering

Hide team from all registrants

In the My Events site, team captains can invite team members to register and join their team by clicking/tapping an event > **Team center** button > **Invite team members to pay on their own** or **Invite team members I will pay for** button and then entering team member email addresses (separated by ;), selecting the price category (selecting **Any** allows teams members to freely select a price category when registering) and if required editing the invitation email:



 **DEFER TEAM DEMO EVENT** TEAM CAPTAIN

[Sign waivers](#) Sign now

 May-act Yin

 Running-Marathon - Individual Age group/open

 June 3, 2024 - August 2, 2025

 8205 WHITETAIL DR, Racine, Wisconsin, 53406

[Registration & QR code](#) [Edit registration](#) [Purchase merchandise](#)

TEAM CAPTAIN



TEAM

defer payment team

Team center

My Events > Team center

TEAM CENTER

[Invite team members to pay on their own](#) [Invite team members I will pay for](#)

defer payment team

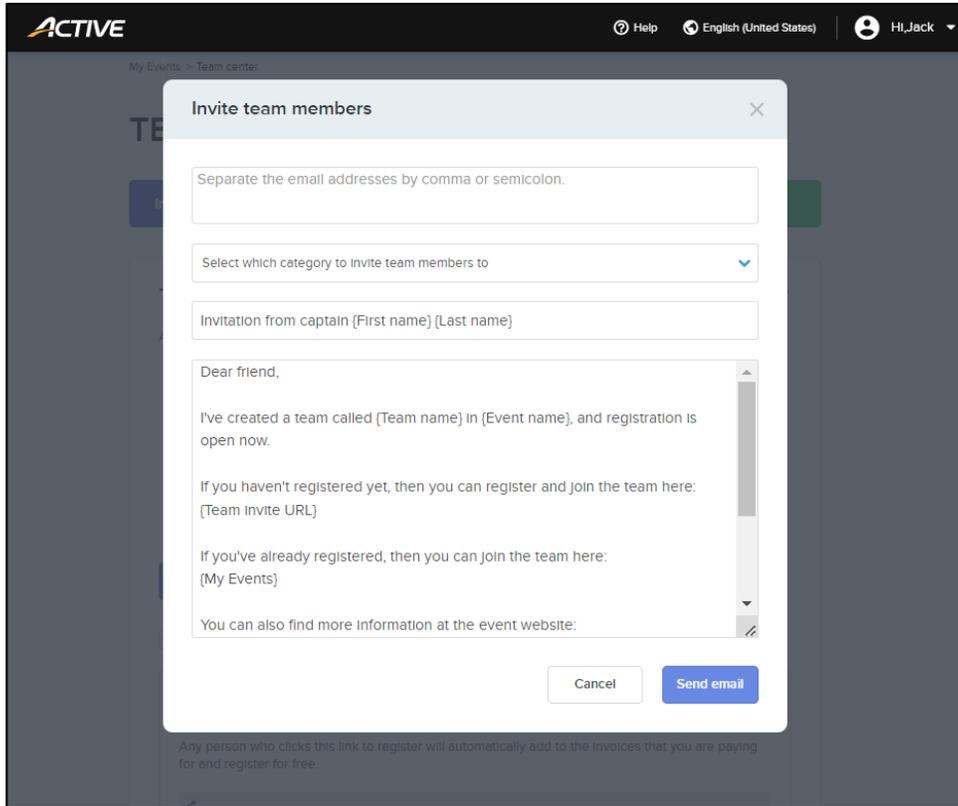


<p>TEAM CAPTAIN</p> <p>MAY-ACT YIN</p> <p>mayyin@activenetwork.com</p>	<p>MEMBERS</p> <p>2</p>	<p> defer team demo event</p> <p> June 3, 2024 - August 2, 2025</p> <p> 8205 WHITETAIL DR, Racine, Wisconsin, 53406</p>
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[Send invites](#) [Email team members](#) [Member report](#)

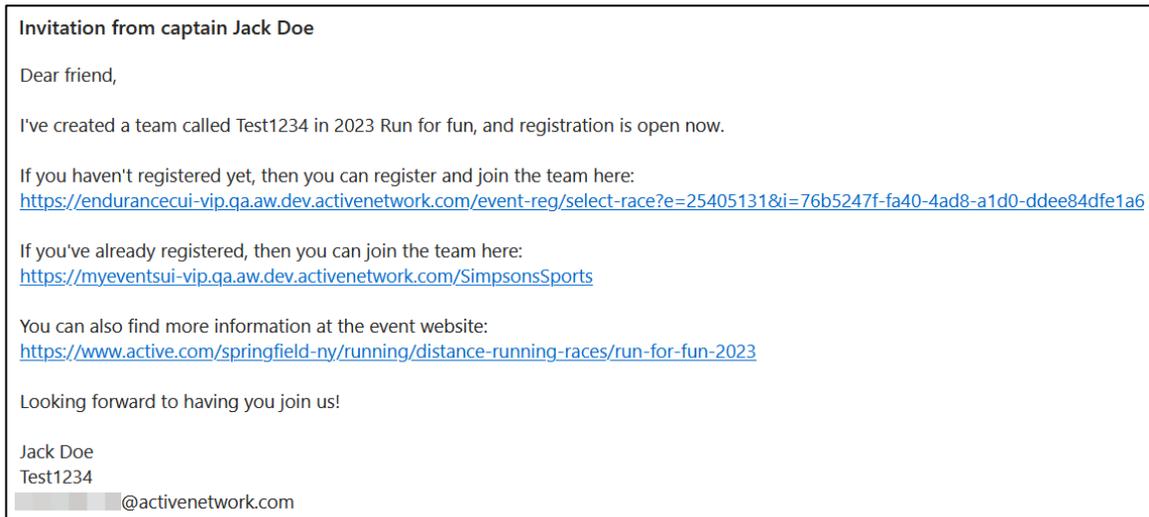
Email me of team activities

REGISTRATIONS PAID BY CAPTAIN



The team members are then sent the following invitation emails:

- **Invite team members to pay on their own case:**



- **Invite team members I will pay for case:**



Invitation from captain Jack Doe

Dear friend,

I've created a team called Test1234 and registration is now open. Click the link below to register and join my team:
[Your registration link](#)

I will cover your registration fee.

Looking forward to having you join us!

Jack Doe
Test1234
[@activenetwork.com](#)

For pay later teams:

- Email reminders are sent to team captains on the configured **Reminder date for team payment**. Team captains pay for their team members' registrations by clicking/tapping the **Pay Now** link:

Urgent: Outstanding Balance Reminder for 2023 Run for fun - Test1234



Hi Jack Doe,

Please note that your team, Test1234, for event 2023 Run for fun, has an outstanding balance of \$ 11.49.

Please [Pay Now](#) to ensure that your team registrations are secured. Alternatively, you can log into your [MyEvents](#) account to view the balance details.

If you have any questions, please contact [@activenetwork.com](#).

Thanks and Regards,
Simpsons Sports

- Team captains can also pay for their team members' registrations by clicking/tapping their **My Events** page > an event > **Team center** button > **REGISTRATIONS PAID BY CAPTAIN** section > **Pay now** button:

REGISTRATIONS PAID BY CAPTAIN

Pay-later invites activated ?

PENDING PAYMENT \$4.95 Due on May 27, 2024 Pay now Download details	INVENTORY CLAIMED 1 / 90 REGISTRATIONS PAID 0 / 1
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ACTIVE

Make a payment

Hello, May-act Yin
i@activenetwork.com

YOUR ORDER

Total \$4.95

[Pay now](#)

Items review

ITEMS	QUANTITY
defer team demo event - Running-Marathon - Individual Age group/open	1

Payment

Payment options

Pay in full now \$4.95

Payment methods

Credit card

Payment information

We accept the following card types:

Name on card *

Card number *

Expiration date *

Month / Year

CVV/CVC *

Store this card for future use

Billing address

Note: Pay later team member registrations can be cancelled but cannot be transferred to another price category, event or person by the organization or the registrant in the My Events site.

In the **My Events** page > an event > **Team center** button > **REGISTRATIONS PAID BY CAPTAIN** section, team captains can also:

- Turn on or off **Pay-later invites**.
- View the number of registrations claimed and the maximum number of registrations in the **INVENTORY CLAIMED** section.

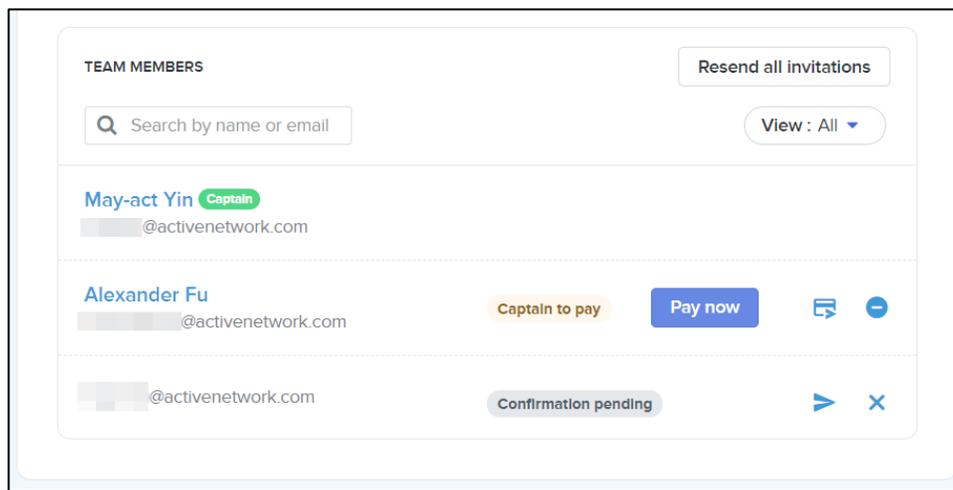


- View the number of registrations paid and the total number of registrations in the **REGISTRATIONS PAID section**.
- View the total **PENDING PAYMENT** due (and the **Due on** date) for team members who have registered without payment. Team captains can download a report of the corresponding team member registrations by clicking the **Download details** link:

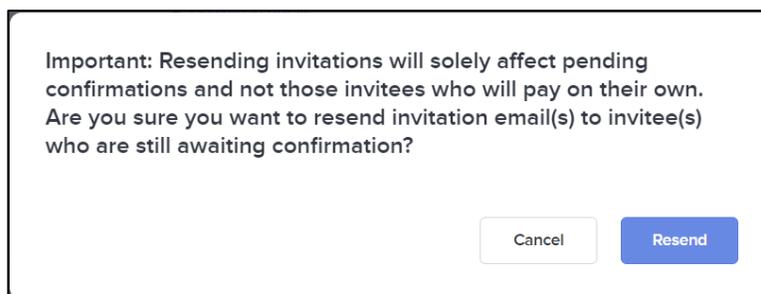
	A	B	C	D	E	F	G	H	I	J
1	Member name	Member email	Registration date	Category	Price type	Price	Discount	Consumer absorbed processing fee	Balance	Payment status
2	Alexander Fu	@activenetwork.com	12/19/2023 23:15	Running-Marathon	Individual Age group/open	4.95	0		3.95	4.95 UNPAID
3										

- View and copy the registration link for paid-by-team-captain registrations.

In the **My Events** page > an event > **Team center** button > **TEAM MEMBERS** section, team captains can:



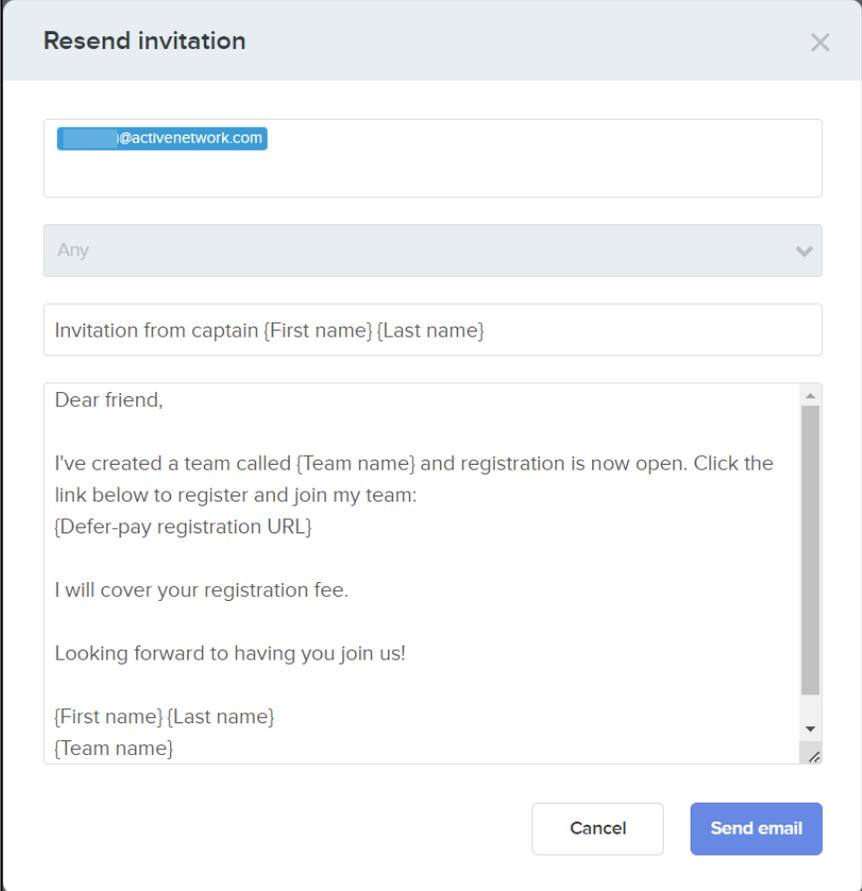
- Resend invitations to all **Confirmation pending** team members by clicking the **Resend all invitations** button.



- Search for a specific team member by entering the team member’s name or email address in the **Search by name or email** field.
- Filter the listed team members by registration status (**View > All, Confirmed or Confirmation pending**).
- View a list of their team members with the corresponding:
 - Team member name and email address.
 - Registration status:
 - **Confirmation pending** (invitation email sent but not yet registered)
 - **Individual to pay**
 - **Individual paid**



- **Captain to pay**; team captains can pay for the registration by clicking/tapping the **Pay now** button.
- **Captain paid**
- Actions:
 - **Resend invitation email** : Resend the invitation email to **Confirmation pending** team members:



The dialog box is titled "Resend invitation" and has a close button (X) in the top right corner. It contains the following elements:

- An email address input field with a blue highlight on the domain "@activenetwork.com".
- A dropdown menu currently set to "Any".
- A text input field containing the placeholder "Invitation from captain {First name} {Last name}".
- A large text area containing a pre-filled email template:

Dear friend,

I've created a team called {Team name} and registration is now open. Click the link below to register and join my team:
{Defer-pay registration URL}

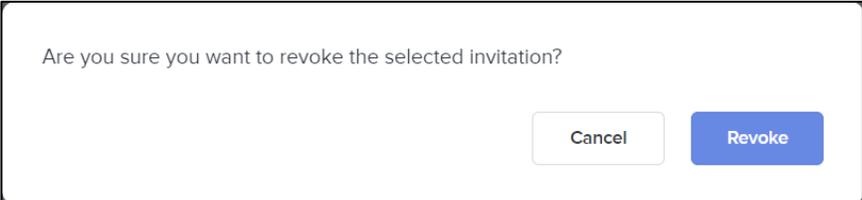
I will cover your registration fee.

Looking forward to having you join us!

{First name} {Last name}

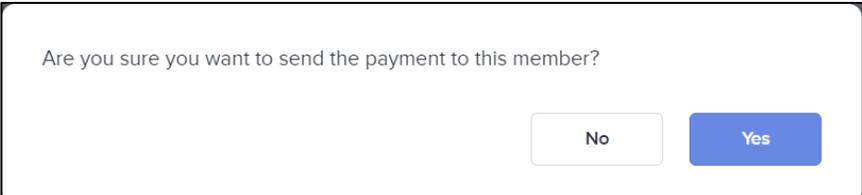
{Team name}
- Two buttons at the bottom: "Cancel" and "Send email".

- **Revoke invitation** :



The dialog box contains the text "Are you sure you want to revoke the selected invitation?" and two buttons: "Cancel" and "Revoke".

- **Send payment to member** : Send an email to team members requesting that they pay for their own registration:



The dialog box contains the text "Are you sure you want to send the payment to this member?" and two buttons: "No" and "Yes".



- **Remove from team** :

Confirm

Are you sure you want to remove this member from your team?



Giving enhancements

During registration:

- If only a single charity is available, then it will be automatically selected:

GIVING



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	Fundraising target amount
Phoenix Demo Event (1181270)	--

Fundraising Not fundraising

Make a donation

USD 2.00 USD 3.00

USD Other amount

USD 1.00 is the minimum donation. All donations are tax-deductible. ⓘ

[Proceed without donating](#)

- Your customers can search for a charity by typing the first few characters of a charity's name in the new search field:



GIVING

Select a charity

Please make your selection from the charity options below.

Default tier

Deaf Children Australia.

Deaf Children Australia



Cancer Council

Cancer Council Australia

New tier

No results found

New tier 2

Unico Found

Neuroend
Seeking the cu
Neuroendocri

New tier 3

Bowel Cancer Australia

- For more streamlined donations, if donations are configured to be optional, then consumers can now skip making a donation by clicking the **Proceed without donating** link:



Make a donation

\$ 1.00 is the minimum donation. All donations are tax-deductible. ⓘ

[Proceed without donating](#)