



Product Release Notes for ACTIVEWorks – November 16, 2021

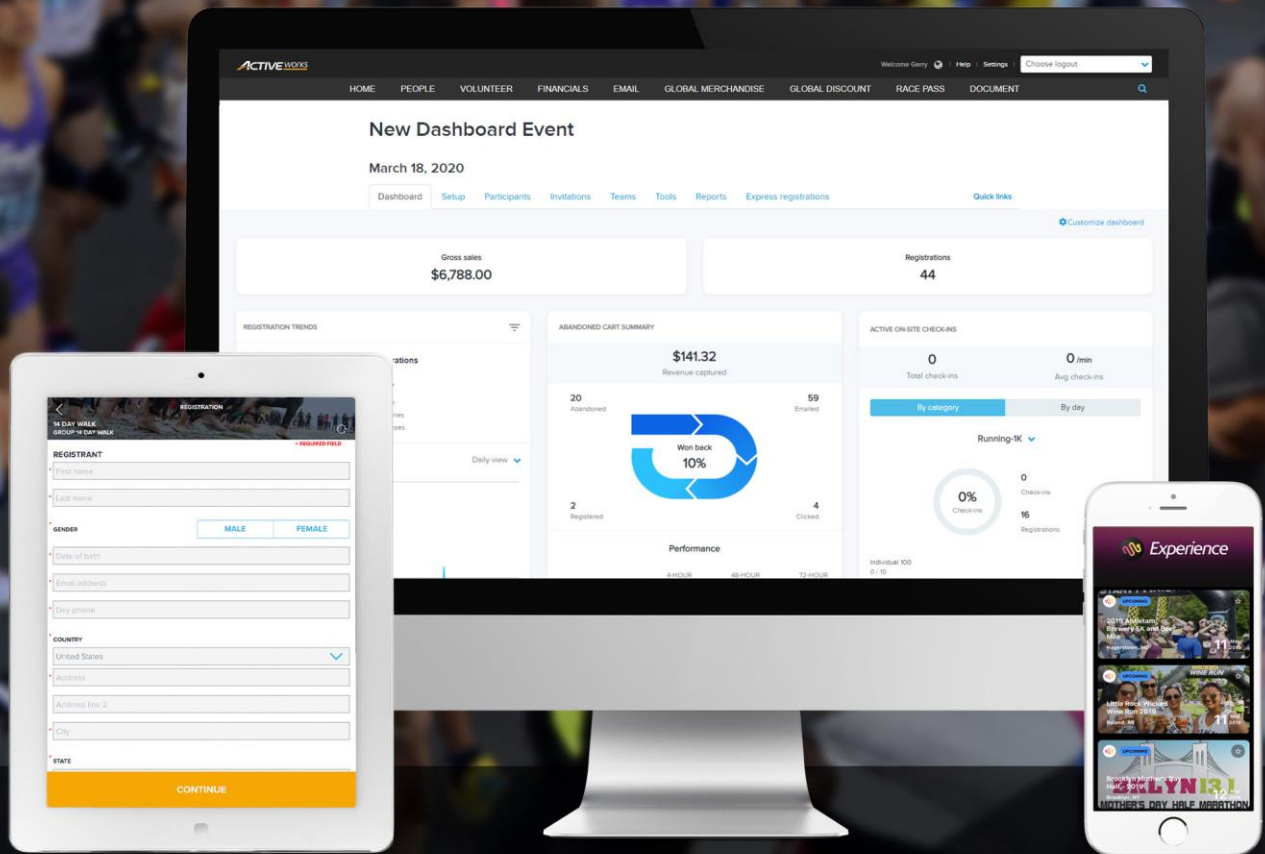


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Customer Relationship Management (CRM): download custom segments

The Customer Relationship Management (CRM) database (the **PEOPLE** tab) module enables you to sort your customers into customized segments according to personal and event information, their purchase history, their email opening rates, their referral history and many other data points. These are saved as Custom Segments.

BACKGROUND TO CUSTOM DATABASE SEGMENTS

The segmenting tool in the **PEOPLE** section allows you to build segments/cohorts/slices of your customer database which continuously update as new data is added to your account. These segments are particularly powerful for marketing purposes and are managed on the **Custom segment** tab.

Custom segments can also be created from the event **Dashboard > PARTICIPANT LOCATIONS** mapping tool. For example, many marketers like to create segments of their customer database based on where customers live, instead of entering numerous zip/post codes. Simply stamp the areas on the map that you want to include in your custom segment, for example, everyone who lives in Texas, except Austin or everyone in New York except Manhattan. These segments can be created in seconds.

WHAT'S NEW?

In this release, you can now download custom segments (with your customers' names, genders, emails, addresses, phone numbers, cities, states, countries, revenues and engagements).

This allows you to better leverage these powerful preorganized datasets with 3rd-party platforms, for example, many marketers like to retarget these exact people in other platforms (such as Facebook), and then create lookalike audiences to further expand their marketing reach and grow their registrations.

There are 2 locations in which you can download a custom segment into a CSV file:

1. The **People list** tab:

You will find your entire database of all participants who have registered for your events. Filter and search for your required subset of customers, and then click the **Download custom segment** button:



The screenshot shows the 'People' interface with a 'Custom segment' tab selected. At the top right, there are two buttons: 'Save as a custom segment' and 'Download custom segment', with the latter highlighted by a red box. Below this is a filter section with an 'Exclude' toggle and a 'Registration details' dropdown. The filter includes several dropdown menus: 'Event' (Run for fun), 'All categories', 'Cancelled', and 'All registration dates'. At the bottom of the filter section are 'Add condition', 'Clear', and 'Search' buttons. Below the filter is a table with 1 result:


NAME	EMAIL ADDRESS	PHONE	CITY	STATE	COUNTRY	GENDER	REVENUE	ENGAGEMENT
Susan Liew	[REDACTED]	[REDACTED]	Dallas	TX	United States	Female	141.00	A

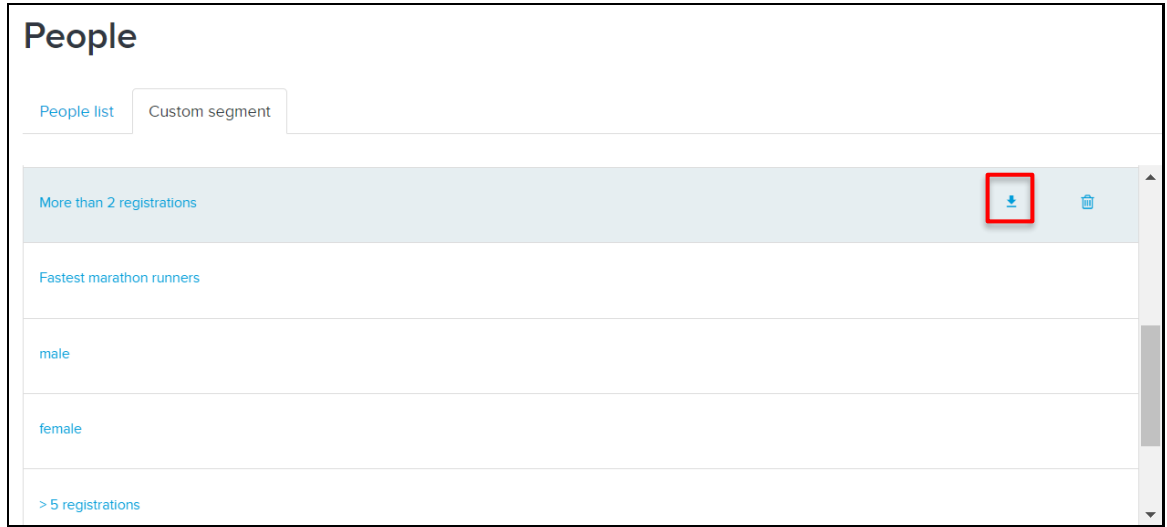
You can then either:

- **Download only**
- **Download and save as new custom segment** (a unique segment name is required)

The modal dialog box is titled 'Download custom segment' and contains the following text: 'Would you also like to save this custom segment as well as download it?'. There are two radio button options: 'Download only' and 'Download and save as new custom segment'. At the bottom right, there are 'Cancel' and 'Download' buttons.

2. The **Custom segment** tab:

- a. Your most recent custom segment is saved at the top of the **Custom segment** tab.
- b. Download a custom segment as a CSV file by hovering the cursor over the required custom segment and then clicking the  icon:



If you want to review the people in the custom segment before downloading, then simply click the custom segment name:



This will navigate you back to the **People list** tab with the filters for that dataset pre-configured and the corresponding people list displayed. After reviewing the segment's people list, click the **Download custom segment** button:



People

People list **Custom segment**

Save as a custom segment **Download custom segment**

Exclude ×

Registration quantity **more than**

5 Results

NAME	EMAIL ADDRESS	PHONE	CITY	STATE	COUNTRY	GENDER	REVENUE	ENGAGEMENT
Lee Alexander			test city	AP	United States	Male	2635.01	A
John Doe			test city	AP	United States	Male	45.00	A
Krusty Klown						Male	400.00	A

As you are reviewing a pre-saved custom segment, you can then either:

- **Download only**
- **Download and update custom segment "<custom segment name>"**
- **Download and save as new custom segment** (a unique segment name is required)

Download custom segment ×

Would you also like to save this custom segment as well as download it?

Download only

Download and update custom segment "More than 2 registrations"

Download and save as new custom segment



Race pass: home page enhancement

To make it easier for you or your staff to view race passes (an Elite-tier feature) and their purchase details, the **RACE PASS > Race pass** tab has been enhanced:

	HOME	PEOPLE	VOLUNTEER	FINANCIALS	EMAIL	GLOBAL MERCHANDISE	MORE ▾
<h3>Race pass</h3>							
Race pass Reports							
Add, edit and manage your race pass.							
Create Delete							
	NAME	PRICE	REDEMPTION PERIOD	SALE PERIOD	ACTION		
<input type="checkbox"/>	Mega Pass	\$25.00	1 Year	3/1/2021 - 3/8/2022	Owners		

- To edit race pass details, click the race pass **NAME**.
- The **START DATE** and **END DATE** columns have been combined and renamed to **REDEMPTION PERIOD** and now displays either the date range or duration in which each race pass can be redeemed for registrations against events.
- A new **SALE PERIOD** column displays when race passes are available for sale to consumers.
- A new **ACTIONS** column > **Owners** link allows athlete services managers to navigate to a list of all owners of that race pass.

Race pass: view owners of each race pass report

You or your staff can now view the owners of each race pass (an Elite-tier feature) by clicking **RACE PASS > Race pass** tab > **ACTIONS > Owners**:

	HOME	PEOPLE	VOLUNTEER	FINANCIALS	EMAIL	GLOBAL MERCHANDISE	MORE ▾
<h3>Race pass</h3>							
Race pass Reports							
Add, edit and manage your race pass.							
Create Delete							
	NAME	PRICE	REDEMPTION PERIOD	SALE PERIOD	ACTION		
<input type="checkbox"/>	Mega Pass	\$25.00	1 Year	3/1/2021 - 3/8/2022	Owners		



HOME	PEOPLE	VOLUNTEER	FINANCIALS	EMAIL	GLOBAL MERCHANDISE	GLOBAL QUESTIONS	MORE -	
Race pass > Owners								
Owners - Mega Pass								
ORDER DATE	ORDER NUMBER	RACE PASS CODE	NAME	GENDER	DOB	EMAIL	USAGE	STATUS
11/8/2021	C-76X5PQVYF68	RP-032YWNVG	Bob Stone	Female	4/11/1990	[REDACTED]	0/3	Confirmed
10/27/2021	C-76X5PNT2XQ9	RP-032F43PH	Susan Liew	Female	1/23/2002	[REDACTED]	0/3	Confirmed

Additional functionality will be added in the future releases to enable you or your staff to manage and edit the individual owners of each race pass.



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