



Product Release Notes for ACTIVEWorks – January 4, 2022

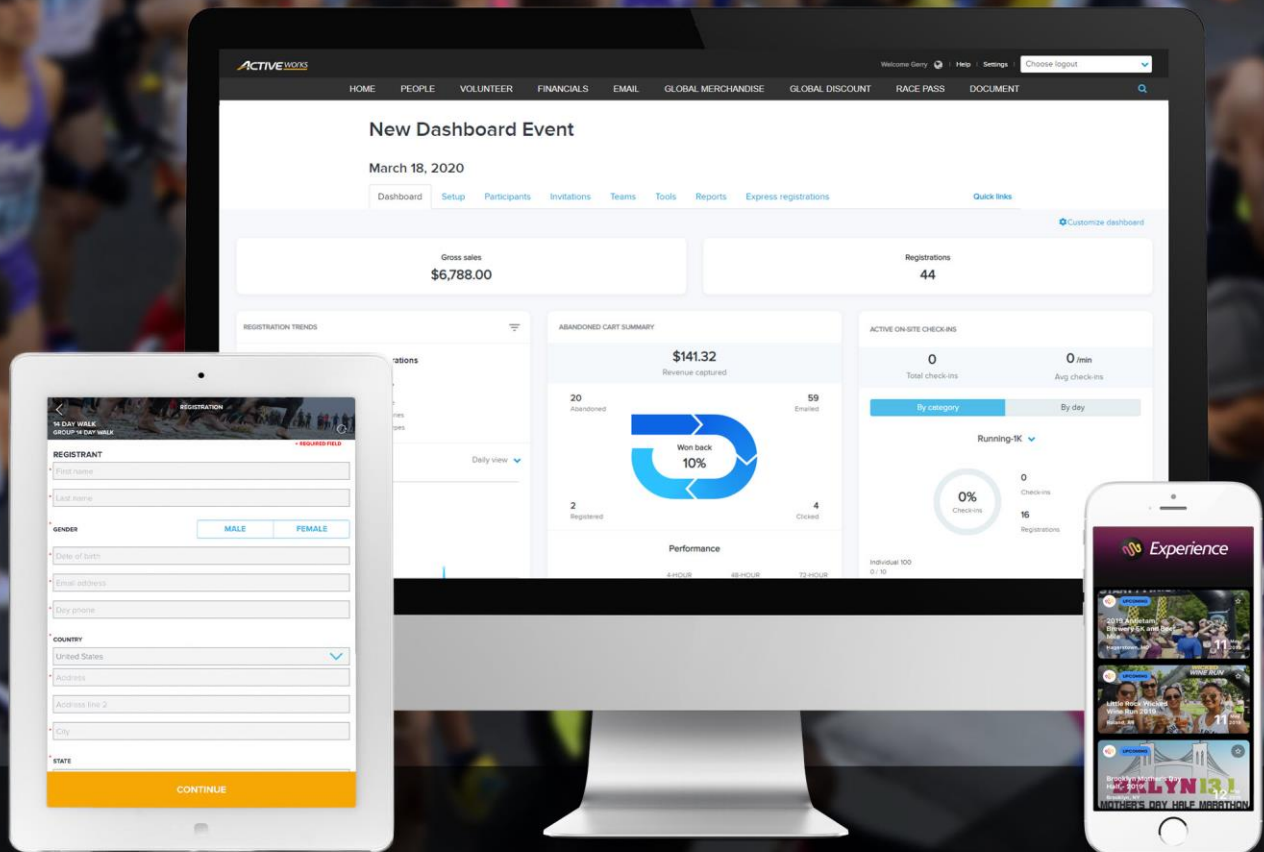


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Order cancellation: edit refund prices and custom fees

In the AUI order cancellation workflow (in an event's home page > **Participants** > a participant > **Actions** > **Cancel**), you can now adjust refund prices and custom fees.

Example:

You are offering an event **Run for fun** with the following configuration:

Run for fun

August 2, 2021

[Dashboard](#) [Setup](#) [Participants](#) [Invitations](#)

Event overview

[Event setup](#)

Run for fun
8/2/2021 - 12/31/2021
Springfield
Springfield County
Oaktree Street
Springfield, AZ 12345

Running-1K	
Individual Age group/open	\$5.00
Running-5K	
Individual Age group/open	\$10.00
Running-8K	
Individual Age group/open	\$10.00
Individual chance entry Age group/open	\$50.00
Running-10K	
Individual Age group/open	\$18.00
Running-15K	
Individual Age group/open	\$100.00

[Dashboard](#) [Setup](#) [Participants](#) [Invitations](#) [Teams](#) [Tools](#) [Reports](#)

Custom fees

Customize charges of additional taxes or surcharges you need to collect from participants.

[Create](#) [Delete](#)

FEE NAME	AMOUNT	REGISTRATION TYPES
<input type="checkbox"/> Tax	10.00 %	Running-5K Running-8K Running-1K Running-10K ...

A participant has registered for **Run for fun - Running-10K - Individual Age group/open** at a price of \$18.00 and with a custom fee (**Tax**) of \$1.80 (10.00% of the product price):



Run for fun

August 2, 2021

Dashboard Setup **Participants** Invitations Teams Tools Reports Express registrations Virtual race

Anila Pastina
network.com

Confirmed - R-10PT41Z94vX
Run for fun - Running-10K - Individual Age group/open
Not on a team

View: All | [Current Purchases](#) | [Responses](#) | [Waivers](#) | [Results](#)

Current purchases

ID: C-76X5Q26CTRC [Actions](#)

ITEMS	PRICE	QUANTITY	SUBTOTAL
Run for fun - Running-10K - Individual Age group/open - Anila Pastina	\$18.00	1	\$18.00
Included t-shirt - Small	\$0.00	1	\$0.00
SUBTOTAL:			\$18.00
TAX			\$1.80
TOTAL:			\$19.80

[Resend confirmation email](#)
[Transfer to another event](#)
[Transfer to another category](#)
[Modify T-shirts and other included items](#)

To cancel this registration, you can select **Actions > Cancel**:

Current purchases

ID: C-76X5Q26CTRC [Actions](#)

ITEMS	PRICE	QUANTITY	
Run for fun - Running-10K - Individual Age group/open - Anila Pastina	\$18.00	1	
Included t-shirt - Small	\$0.00	1	
SUBTOTAL:			\$18.00
TAX			\$1.80
TOTAL:			\$19.80

[Cancel](#)
[Transfer to another event](#)
[Transfer to another category](#)
[Apply credit](#)

You can then select an item and edit its **REFUND AMOUNT**:

- Original prices:



Cancel order

Select the items you would like to cancel below and continue. Canceled items will be returned to inventory. ?

Order ?

<input checked="" type="checkbox"/>	ITEMS	PRICE	REFUND AMOUNT	QUANTITY	SUBTOTAL
<input checked="" type="checkbox"/>	Run for fun - Running-10K - Individual Age group/open - Anila Pastina Anila Pastina Registration Id: R-10PT41Z94VX	\$18.00	<input type="text" value="0.00"/> USD	1	\$18.00 \$0.00
<input checked="" type="checkbox"/>	Included t-shirt - Small	\$0.00	<input type="text" value="0.00"/> USD	1	\$0.00 \$0.00

Canceled: \$18.00

Cancellation fee: ? \$18.00

Refund total: ? \$0.00

Comments

CancelNext

- Adjusted refund prices:

Cancel order

Select the items you would like to cancel below and continue. Canceled items will be returned to inventory. ?

Order ?

<input checked="" type="checkbox"/>	ITEMS	PRICE	REFUND AMOUNT	QUANTITY	SUBTOTAL
<input checked="" type="checkbox"/>	Run for fun - Running-10K - Individual Age group/open - Anila Pastina Anila Pastina Registration Id: R-10PT41Z94VX	\$18.00	<input type="text" value="13.00"/> USD	1	\$18.00 -\$13.00
<input checked="" type="checkbox"/>	Included t-shirt - Small	\$0.00	<input type="text" value="0.00"/> USD	1	\$0.00 \$0.00

Canceled: \$18.00

Cancellation fee: ? \$5.00

Refund total: ? -\$13.00

Comments

Refund \$13 instead of \$18 for Run for fun - Running-10K - Individual Age group/open - Anila Pastina

CancelNext

Edit the refund prices as required (in this example, refund \$13 instead of \$18) and then click **Next**. You can then change the custom fees by clicking **Edit fees**:



Review modified items

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

Order ? Edit fees

ITEMS	PRICE	QUANTITY	SUBTOTAL
Run for fun - Running-10K - Individual Age group/open Anila Pastina Registration Id: R-10PT41Z94VX	\$18.00	-1	-\$18.00
Included t-shirt - Small	\$0.00	-1	\$0.00
SUBTOTAL:			-\$18.00
TAX			-\$1.30
CANCELLATION FEE: ?			\$5.00
TOTAL:			-\$14.30

The displayed custom fee (\$1.30) is automatically calculated based on the updated refund amount (\$13.00):

Edit fees

ITEMS	FEE	SUBTOTAL
Tax		
Cancellation of Run for fun - Running-10K - Individual Age group/open Anila Pastina	1.30 USD	-\$1.30
Subtotal		-\$1.30

Cancel Save

You can then adjust the custom fee refund amount as required, in this case, you have chosen to adjust it down from \$1.30 to \$0.80:

Edit fees

ITEMS	FEE	SUBTOTAL
Tax		
Cancellation of Run for fun - Running-10K - Individual Age group/open Anila Pastina	0.80 USD	-\$0.80
Subtotal		-\$0.80

Cancel Save

Click **Save** to review the modified items; all changes to the product prices and custom fees to refund are displayed for review.



After reviewing the refund summary, click **Next** to execute the cancellation (in this example, \$13.80 will be refunded to the participant). Remember, you can select to refund to either the purchaser's original payment method or to their credit balance (store credit).

Review modified items

Please review the items below. To complete your transaction, click next. [?](#)

Order [?](#)

Edit fees

ITEMS	PRICE	QUANTITY	SUBTOTAL
Cancellation of Run for fun - Running-10K - Individual Age group/open - Anila Pastina	-\$18.00	-1	-\$18.00
Cancellation of Included t-shirt - Small	\$0.00	-1	\$0.00
SUBTOTAL:			-\$18.00
TAX			-\$0.80
CANCELLATION FEE: ?			\$5.00
TOTAL:			-\$13.80

Refund to

☐ Original payment method

☒ Credit balance [?](#)

Back

Cancel

Next



Order successfully canceled

Order information

Order ID:

C-76X5Q26HP3Q

Order date:

Monday, December 20, 2021

Order amount:

-\$13.00

Order modifications [?](#)

Modified items

C-76X5Q26HP3Q 12/20/2021 9:05 p.m.	Canceled - Run for fun - Running-10K - Individual Age group/open - Anila Pastina Refunded \$13.00 of \$18.00	-\$13.00
	Canceled - Included t-shirt - Small Refunded \$0.00 of \$0.00	\$0.00

SUBTOTAL:

-\$13.00

TAX:

-\$0.80

TOTAL:

-\$13.80

Original order

ITEMS	PRICE	QUANTITY	SUBTOTAL
Run for fun - Running-10K - Individual Age group/open - Anila Pastina Anila Pastina <i>ACTIVE Advantage member</i> Registration Id: R-10PT41Z94VX	\$18.00	1	\$18.00
Included t-shirt - Small	\$0.00	1	\$0.00
SUBTOTAL:			\$18.00
TAX:			\$1.80
PROCESSING FEE: ?			\$0.99
ACTIVEADVANTAGE DISCOUNT: ?			-\$0.99
TOTAL:			\$19.80

Print

Return

Revenue report: new Amount not remitted column

A new column has been added to the **FINANCIALS > Revenue report**, you can now view both **Remittance amounts** and **Amount not remitted** amounts in separate columns. The **Amount not remitted** amount occurs when a purchaser used a combination of credit card and credit balance to pay for a registration.

Example:

For the order C-76X5PYVB3X8, the order amount was \$40, of which \$38 was paid using a credit card and \$2 was paid from a credit balance (ACCOUNT_PAYMENT). The \$2 is thus not remitted to the organization.



Participant	Order id	Transaction type	Payment type	Pa	Unit price	Quantity	Order amount	Remittance amount	Amount not remitted	Order date	ent
CBT ZAR	C-76X5PYSMCF8	Purchase	Cash		51	1	51	0	0	12/10/20	
CBT ZAR	C-76X5PYSMCF8	Purchase	Cash		0	1	0	0	0	12/10/20	
	C-76X5PYSMCF8	Payment	Cash		0		0	0	51	12/10/20	
CBT ZAR	C-76X5PYVB3X8	Purchase	Mixed	AP	40	1	40	0	0	12/10/20	
CBT ZAR	C-76X5PYVB3X8	Processing fees	Mixed	AP	-16	1	-16	-16	0	12/10/20	
CBT ZAR	C-76X5PYVB3X8	Purchase	Mixed	AP	0	1	0	0	0	12/10/20	
	C-76X5PYVB3X8	Payment	Credit card		0		0	38	0	12/10/20	
	C-76X5PYVB3X8	Payment	ACCOUNT PAYMENT		0		0	0	2	12/10/20	
someone C	C-76X5PZ4Q5XN	Purchase	Credit card	AP	40	1	40	0	0	12/10/20	
someone C	C-76X5PZ4Q5XN	Purchase	Credit card	AP	0	1	0	0	0	12/10/20	
	C-76X5PZ4Q5XN	Payment	Credit card		0		0	40	0	12/10/20	
someone	C-76X5PZ3YZ26	Refund	ACCOUNT PAYMENT		-20	1	-20	0	0	12/10/20	SXN
	C-76X5PZ3YZ26	Refund	ACCOUNT PAYMENT		0		0	0	-20	12/10/20	SXN
CBT ZAR	C-76X5PZ3Z8R6	Purchase	eCheck (ACH)	AP	101	1	101	0	0	12/10/20	
CBT ZAR	C-76X5PZ3Z8R6	Purchase	eCheck (ACH)	AP	0	1	0	0	0	12/10/20	
	C-76X5PZ3Z8R6	Payment	eCheck (ACH)		0		0	101	0	12/10/20	
CBT ZAR	C-76X5PZ406S7	Refund	ACCOUNT PAYMENT		-7	1	-7	0	0	12/10/20	R6
	C-76X5PZ406S7	Refund	ACCOUNT PAYMENT		0		0	0	-7	12/10/20	R6

Credit balance refunds

You can now refund a credit balance to a consumer's original payment method by clicking the **AUI > PEOPLE > a participant > CREDIT BALANCES > a credit balance > Refund** button:

Bob White

Email engagement

Gross revenue

Registrations

F

579.20

5

567.20 REGISTRATION

12.00 MERCHANDISE

No influence

0 REFERRALS

\$0 REFERRAL REVENUE

0 EVENTS SHARED

EVENTS

EMAILS

VOLUNTEER

RESULTS

CREDIT BALANCES

Simpson Sports

\$700.00

Refund

Secondary account_AUD (*2351)

AUD 7.00

Refund

In the example above, the agency's primary remittance account is displayed as the organization name (**Simpson Sports**).



Race pass owners list page enhancement

In this release, you can now view the status of each race pass in the **Race pass** tab > name of race pass > **VIEW OWNERS** 👤 > **STATUS** column. Race pass statuses include:

- Confirmed
- Pending
- Unclaimed
- Canceled
- Valid
- Expired

Race pass > PRP1009							
Owners - PRP1009				Q Enter search here...		Search	
ORDER DATE	NAME	GENDER	DOB	EMAIL	USAGE	STATUS	RACE PASS
12/1/2021	[REDACTED]	Female	2/2/1988	[REDACTED]	1 / 10	Confirmed	RP-033H51B6
12/1/2021	[REDACTED]	Female	2/2/1988	[REDACTED]	0 / 10	Pending	RP-033H4TWH
12/1/2021	[REDACTED]	Female	8/1/1989	[REDACTED]	1 / 10	Confirmed	RP-033H4MFV
11/24/2021	[REDACTED]	Female	1/2/1999	[REDACTED]	0 / 10	Confirmed	RP-033DTHYT
11/11/2021	[REDACTED]	Female	7/15/1980	[REDACTED]	0 / 10	Pending	RP-032YXXJF
11/9/2021	[REDACTED]	Female	1/2/1996	[REDACTED]	0 / 10	Confirmed	RP-032YX2QS
11/9/2021	[REDACTED]	Female	1/2/1993	[REDACTED]	0 / 15	Confirmed	RP-032YWW83
10/27/2021	[REDACTED]	Female	1/1/1991	[REDACTED]	0 / 15	Canceled	RP-032F4JLT

Race pass cancellation

You can now cancel and refund (if you choose) an individual race pass order by clicking **Race pass** tab > a race pass > **VIEW OWNERS** 👤 > find/search for the person > **RACE PASS CODE** > **Cancel order**:



Race pass > Mega Pass > RP-032YWNVG

RP-032YWNVG details

[Cancel order](#)

Order # C-76X5PQVYF68 Order date 11/8/2021 Race pass name Mega Pass

Race pass code	Usage	Status
RP-032YWNVG	0 / 3	Confirmed

Owner information

Full name	Bob Stone
Gender	FEMALE
Date of birth	4/11/1990
Email	[REDACTED]

[Back](#)

You can then edit the refund amount as required up to the original payment amount and enter a comment in the **Comments** section.

Example:

For a race pass sold for \$25, when canceling the race pass, you can edit the **REFUND AMOUNT** to \$22 to effectively charge a cancellation fee of \$3 (**Cancellation fee = PRICE(\$25) – REFUND AMOUNT(\$22)**).

The **Refund total** is \$22:

Cancel order

Select the items you would like to cancel below and continue. Canceled items will be returned to inventory. ?

Order ?

<input checked="" type="checkbox"/>	ITEMS	PRICE	REFUND AMOUNT	QUANTITY	SUBTOTAL
<input checked="" type="checkbox"/>	Simpsons Sports - Mega Pass - Bob Stone	\$25.00	22.00 USD	1	\$25.00 -\$22.00

Canceled:	\$25.00
Cancellation fee: ?	\$3.00
Refund total: ?	-\$22.00

Comments

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



After reviewing the modified items and refund information, click **Next** to execute the cancellation. Any refund is processed, and the **Status** of the order is changed to **Canceled**:

[Race pass](#) > [Mega Pass](#) > RP-032YWNVG

RP-032YWNVG details

Cancel order

Order # C-76X5PQVYF68

Order date 11/8/2021

Race pass name **Mega Pass**

Race pass code	Usage	Status
RP-032YWNVG	0 / 3	Canceled

Owner information

Full name	Bob Stone
Gender	FEMALE
Date of birth	4/11/1990
Email	[REDACTED]



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ACTIVE Network, LLC

Dallas Corporate Office

5800 Granite Parkway – 12th Floor

Plano, Texas 75201