



Product Release Notes for ACTIVEWorks – May 10, 2022

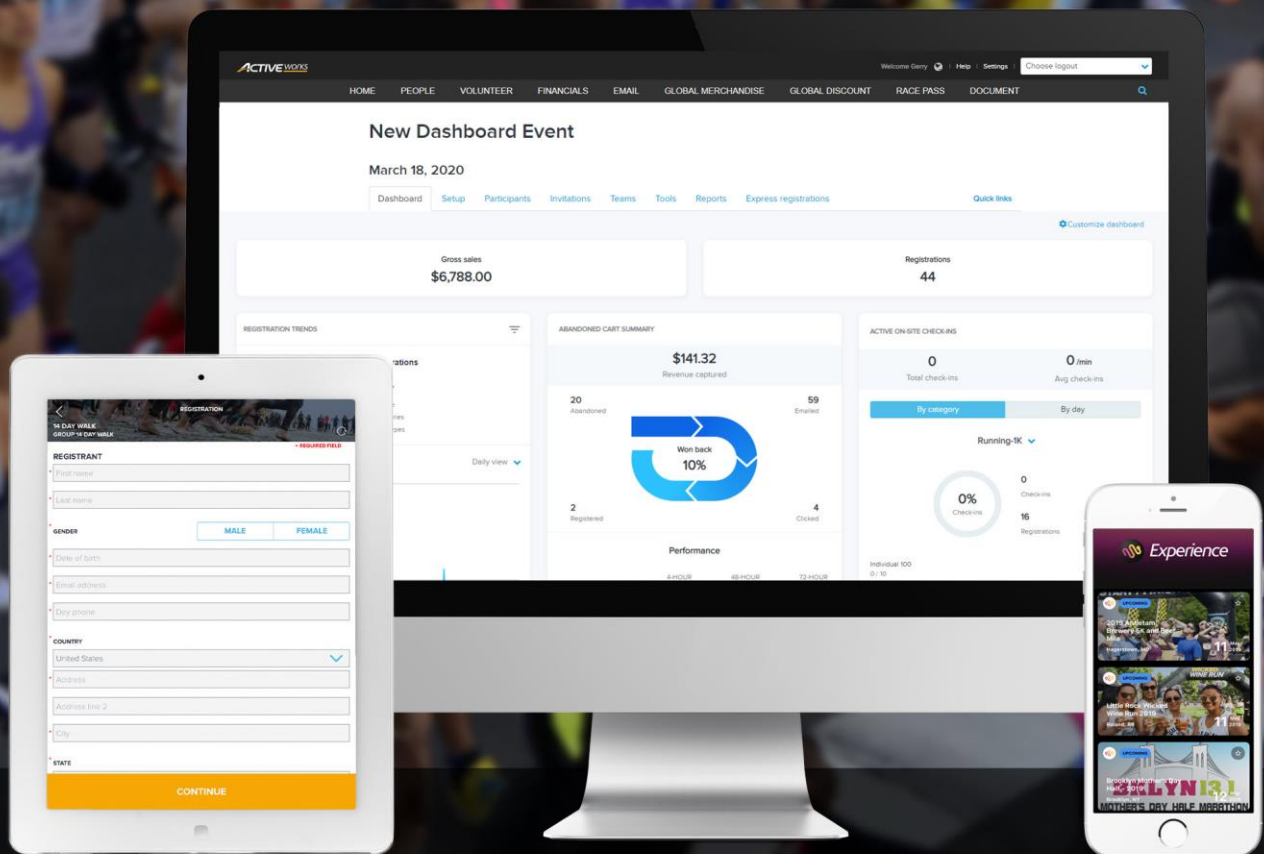


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People database/Customer Relationship Management (CRM): new data fields

The **PEOPLE** database/Customer Relationship Management (CRM) feature (a Premium-tier feature) enables you to sort your customers into custom segments according to their personal information, purchase history, event history, email opening rates, referral history and many other data points.

Our last release rearranged customers' records in the **EVENTS** tab to make it easier for you to manage their orders and to enable quicker navigation to a registration ID and order ID.

In this release, enhancements include displaying:

- A **MODIFIED ON** column for each registration
- The status of **WAIVERS**

People > Anila Pastina

Anila Pastina
Female

Gross revenue
\$42.80

Registrations
1

EVENTS | EMAILS | VOLUNTEER | RESULTS | CREDIT BALANCES

Add registration

REGISTERED	EVENT	CATEGORIES	REVENUE
11/23/2021	Run for fun	Running-10K	\$42.80

Registrations

MODIFIED ON	STATUS	REGISTRATION #	ORDER #	CHECKED-IN	WAIVERS	CATEGORY & PRICE TYPE	REVENUE
3/31/2022	Confirmed	R-1...3NN	C-7...C8D	✕	✓	Running-10K - Individual Age group/open	\$19.80
3/31/2022	Transferred	R-1...0FB	C-7...C8D	--	--	Running-8K - Individual Age group/open	\$0.00
3/31/2022	Transferred	R-1...5G8	C-7...1LD	--	--	Running-5K - Individual Age group/open	\$0.00
TOTAL							\$19.80



People database/Customer Relationship Management (CRM): referral rebate layout enhancement

The layout of the **Social Referral Program** section (in the **PEOPLE** > a customer > **EVENTS** tab) has been enhanced:

EVENTS

EMAILS

VOLUNTEER

RESULTS

CREDIT BALANCES

Add registration

REGISTERED	EVENT	CATEGORIES	REVENUE
4/21/2022	Run for fun	Running-1 Mile	\$122.00

Registrations

MODIFIED ON	STATUS	REGISTRATION #	ORDER #	CHECKED-IN	WAIVERS	CATEGORY & PRICE TYPE	REVENUE
4/21/2022	Confirmed	R-T...ZTL	C-5...CLW			Running-1 Mile - Individual Age group/open	\$112.00
TOTAL							\$112.00

Social Referral Program

Referrals

2

1
More to the next level

\$0.00
Discount achieved

Merchandise

FULFILLED	ITEM	QUANTITY	REVENUE
0 / 1	Included t-shirt - Small	1	\$10.00
TOTAL			\$10.00



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