



Product Release Notes for ACTIVEWorks Swimming – February 12, 2020

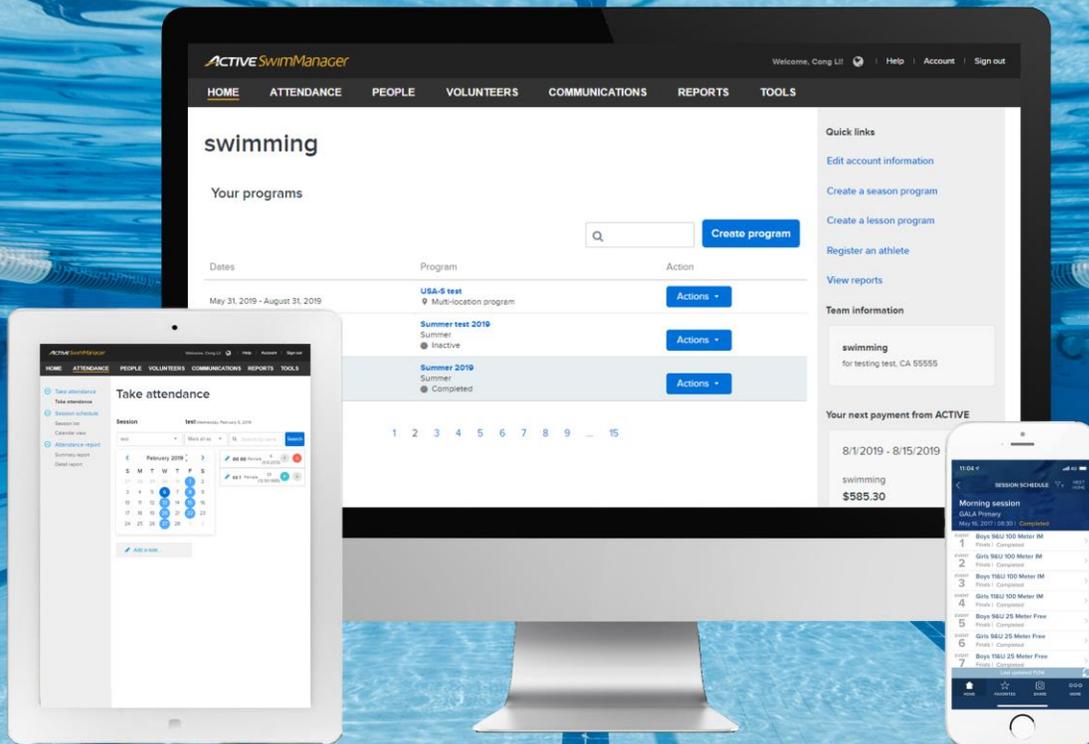


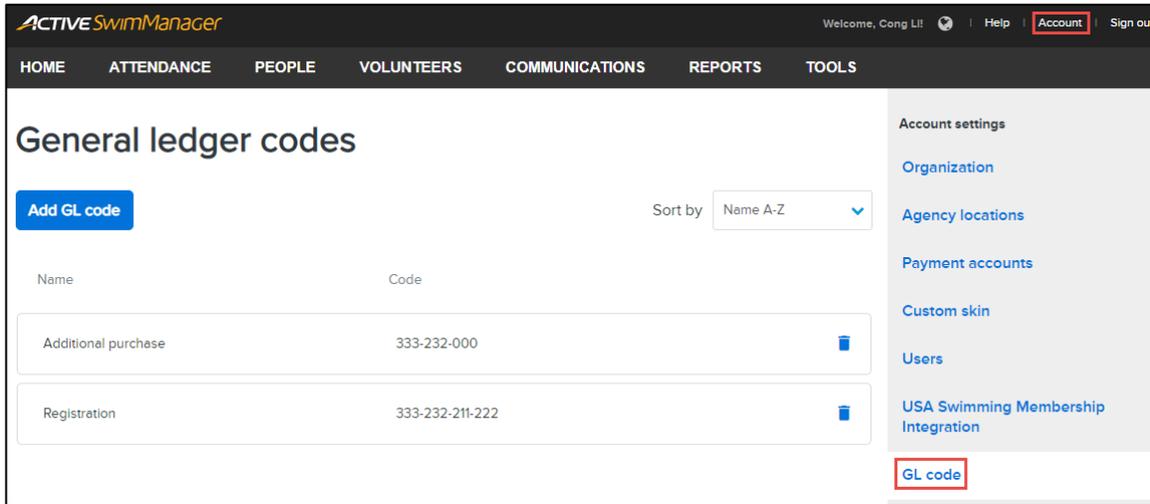
Table of Contents

GL Codes	2
Email Tool: New FAQ links.....	9
Resolved Issues	10



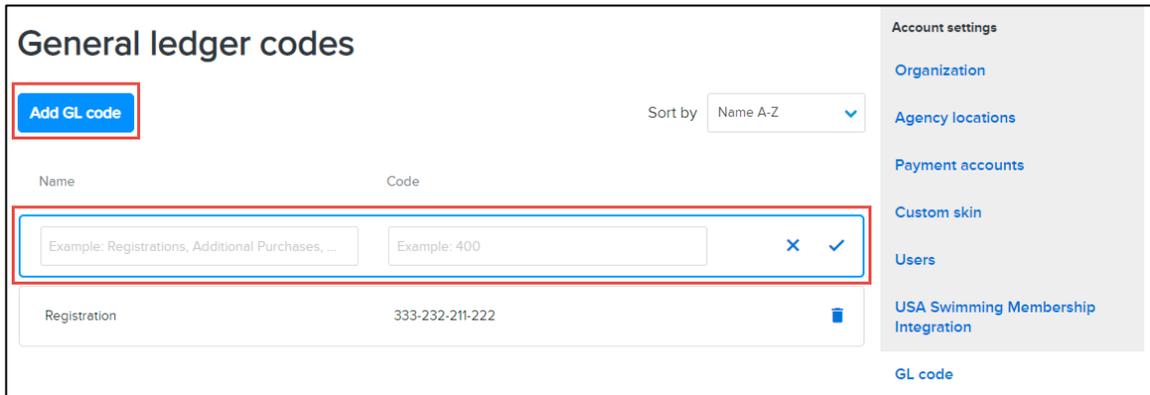
GL Codes

To allow you (administrators and treasurers) to set up and manage General Ledger (GL) codes for your programs and meets so that your agency can track the revenues by GL codes, a new **Account > GL code** feature has been added to the ACTIVE Swim Manager AUI:



On this page, you can:

- view existing GL codes (by default, the GL codes are listed in ascending, alphabetical order by **Name**. You can click the **Sort by** dropdown list to sort the list from A-to-Z or Z-to-A.)
- add a new GL code by clicking **Add GL code**, entering a **Name** and unique **Code** and then clicking  to save the record (to abandon the record, click ):



- edit an existing GL code by double-clicking the required **Name** or **Code**:



General ledger codes

[Add GL code](#) Sort by Name A-Z

Name	Code	
<input type="text" value="Additional purchase"/>	<input type="text" value="333-232-000"/>	<input type="button" value="x"/> <input type="button" value="✓"/>
Registration	333-232-211-222	<input type="button" value="🗑"/>

Note:

- If a GL code has been assigned to any products or is associated with any transactions, then the **Code** field cannot be edited.
- Editing the **Name** of a GL code will update the information in all products and legacy transaction records associated with this GL code.
- delete an existing GL code by clicking  .

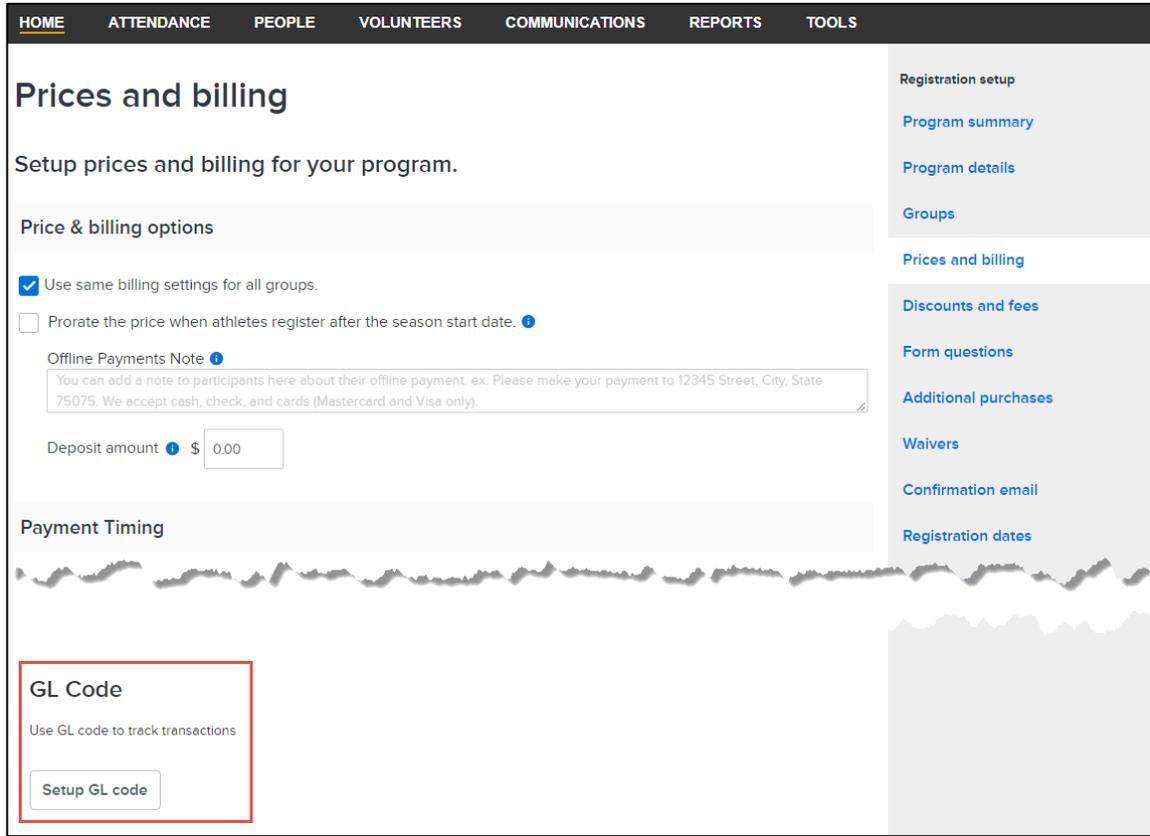
Registration	333-232-211-222	<input type="button" value="🗑"/>
--------------	-----------------	----------------------------------

Note:

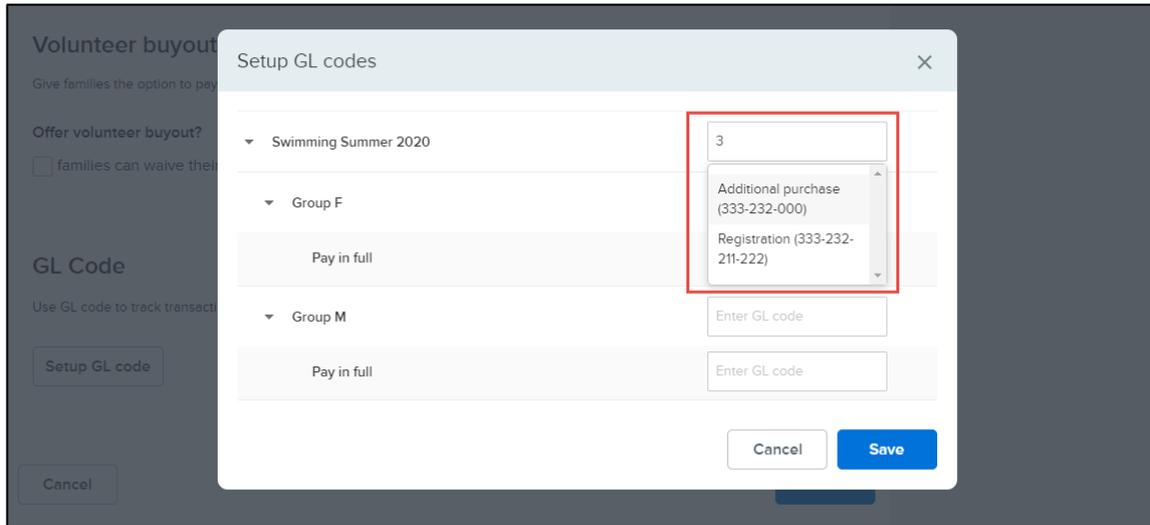
- If a GL code has been assigned to any products, then deleting the GL code unassigns it from all products using this code.
- If a GL code is associated with any transactions, then it cannot be deleted.

After setting up GL codes, you can then assign GL codes to the following products by clicking the **GL code** entry fields (matching results are automatically displayed when you enter a value):

- Programs (note: copying a program with products assigned with GL codes also copies the GL codes to the new program):
 - Registration fees (**HOME** > a program > **Prices and billing** > **GL code** section > **Setup GL code**):



On the **Setup GL codes** popup, GL codes are available to assign to programs, groups, pay in full (if used) and billing schedules (if used):



- Additional purchases (**HOME** > a program > **Additional purchases** > **Edit additional purchases** > an add-on > **Edit properties** > **GL code**):



HOME ATTENDANCE PEOPLE VOLUNTEERS COMMUNICATIONS REPORTS TOOLS

Additional purchases

Templates

- Men's swim suit
- Woman's swim suit
- Goggles
- T-shirt
- Swim cap
- Bumper sticker
- Parka
- Warm-up jacket
- Warm-up pants
- Sweatshirt
- Sweatpants
- Custom

Edit properties

[Advanced settings](#)

Name * Men's swim suit

GL code Additional purchase (333-232-000)

Purchase is required

Description

Note: copying an add-on assigned with a GL code also copies the GL code to the new add-on. You can edit the GL code as required:

Edit properties

[Advanced settings](#)

Name * Copy of Men's swim suit

GL code Additional purchase (333-232-000)

Purchase is required

- Volunteer buyout (**HOME** > a program > **Prices and billing** > **Volunteer buyout** section > **Offer volunteer buyout?** checkbox > **GL code**):



HOME ATTENDANCE PEOPLE VOLUNTEERS COMMUNICATIONS REPORTS TOOLS

Prices and billing

Setup prices and billing for your program.

Price & billing options

Use same billing settings for all groups.

Prorate the price when athletes register after the season start date. ⓘ

Offline Payments Note ⓘ
You can add a note to participants here about their offline payment. ex. Please make your payment to 12345 Street, City, State 75075. We accept cash, check, and cards (Mastercard and Visa only).

Deposit amount ⓘ \$

Payment Timing

All groups

Volunteer buyout

Give families the option to pay a fee instead of volunteering.

Offer volunteer buyout?

families can waive their volunteer commitment by paying

GL code

Registration setup
Program summary
Program details
Groups
Prices and billing
Discounts and fees
Form questions
Additional purchases
Waivers
Confirmation email
Registration dates
ACTIVE.com listing

- Late registration fees (**HOME** > a program > **Discounts and fees** > **Late registration fees** checkbox > **GL code**):

HOME ATTENDANCE PEOPLE VOLUNTEERS COMMUNICATIONS REPORTS TOOLS

Discounts and fees

Automatic discounts & fees

Enable the discounts and fees you want to apply automatically when an athlete is registered. This discount will apply to all groups.

Early registration discounts discount when athletes register by
Discount must be less than the first billing amount.

Late registration fees fee when athletes register after

GL code

Family discounts Offer discounts to families registering more than one child.

Registration setup
Program summary
Program details
Groups
Prices and billing
Discounts and fees
Form questions
Additional purchases
Waivers
Confirmation email

- Meets:
 - Meet entry fees (**HOME** > a meet > **Actions** > **Meet entry fees**):



	Meet host fees	Custom fees	GL code
Swimmer surcharge:	<input checked="" type="radio"/> \$24.50	<input type="radio"/> x.xx	Enter GL code
Individual events:	<input checked="" type="radio"/> \$1.50	<input type="radio"/> x.xx	Enter GL code
Relay events:	<input checked="" type="radio"/> \$3.00	<input type="radio"/> x.xx	Enter GL code
Team surcharge:	\$0.00		
Facility surcharge:	\$0.00		

- Miscellaneous fees:
 - Batch miscellaneous fees (**PEOPLE > Add miscellaneous fee > GL code**):

Add miscellaneous fee

Miscellaneous fee detail

Name *

Description *

Price *

Auto charge Charge automatically if there is card on file.

GL code 3

Additional purchase (333-232-000)

Registration (333-232-211-222)

Charging list

This miscellaneous fee will be charged from adult athletes or the parent of underage athletes.

- Miscellaneous fees for a single person (**PEOPLE > an adult athlete or a parent > Add miscellaneous fee > GL code**):



People Record

View

Athlete info

Performance goals

Seasonal Improvement

Back

Nathan Zhang - Athlete

Edit person

Send email

USA Swimming ID: 030780NAT*ZHAN

Gender: MALE

Age (DOB): 39 March 7, 1980

Family

Parents/Guardians

Children

Wallet

nathan zhang *****5678 ELECTRONIC_CHECK

nathan **** * 4113 VISA Expires: 05/2019

Miscellaneous fees

Registrations

Add miscellaneous fee

People Record

View

Athlete info

Performance goals

Seasonal Improvement

Back

Nathan Zhang - Athlete

Edit person

Send email

USA Swimming ID: 030780NAT*ZHAN

Gender: MALE

Age (DOB): 39 March 7, 1980

Family

Parents/Guardians

Children

Wallet

nathan zhang *****5678 ELECTRONIC_CHECK

nathan **** * 4113 VISA Expires: 05/2019

Miscellaneous fees

Registrations

Add miscellaneous fee

Create a miscellaneous fee

Name *

Description *

Price *

Auto bill swimmers if the credit card is on file.

GL code

Enter GL code

Cancel OK

You can also filter the **REPORTS > Transactions** report by **GL code**, and view and sort transactions by GL code using the **GL code** column:



Transactions

Back

Filter by

Order type: All

GL code: All

Date:

- ✓ All
- Additional purchase (333-2...
- Registration (333-232-211-2...

Apply

Order type: ALL

\$ 140,021.26 (\$ 5,436.93) (\$ 218.96) (\$ 43,573.76)

Total Sales* Total Processing Fee Total Discounts Total Refunds

*Total sales does not include discounts, returns and fees

Transaction Date	Order ID	Parent first name	Parent last name	Transfer From	Type	Description	Tender type	Charge	Addon	Discount	Processing fee	Payment	Remittance amount	GL code
1/31/2020	C-76KSH80B168	cc	I		Agency absorbed processing fee (%)	swimming Winter 2016 USA-S athlete: Rrrrrr Li group: Group1					(\$ 29.70)		(\$ 29.70)	
1/31/2020	C-76KSH80B168	cc	I		Registration	swimming Winter 2016 USA-S athlete: Rrrrrr Li group: Group1		\$ 600.00						
1/31/2020	C-76KSH80B168	cc	I		Payment	Credit card payment	Credit card					\$ 600.00	\$ 600.00	
1/14/2020	C-76KSH3NUN1X	cc	I		Agency absorbed processing fee (flat)	Swimming lessons winter 2019 athlete: Rrrrrr Li					(\$ 5.00)		(\$ 5.00)	

Email Tool: New FAQ links

To assist you and your staff in using the new Email tool implemented in the previous release, the Help Center articles in the **COMMUNICATIONS > Frequently asked questions** section have been replaced by the following new articles:

HOME ATTENDANCE PEOPLE VOLUNTEERS **COMMUNICATIONS** REPORTS TOOLS

Communications

Create a text Create an email

Communications

View all emails

View all texts

Create email/text

Create an email

Create a text

Frequently asked questions

How do I send emails?

How do I create an email template?

How do I customize items on email template?

How do I send text messages?

Scheduled and draft emails

Subject	Status	Last updated	Scheduled for/Sent	
test	Draft	1/2/2020	-	Delete
Test	Draft	12/31/2019	-	Delete
swimming	Draft	8/12/2019	-	Delete

View All

Recent sent emails

Subject	Status	Last updated	Sent	
rr	Sent	11/13/2019	11/13/2019	Report
aaa	Sent	9/27/2019	9/27/2019	Report



Resolved Issues

- Previously, email analytics in the **COMMUNICATIONS > View all emails** feature failed to track opened email statistics. This issue has been resolved in this release.



ACTIVE Network, LLC

© 2020 ACTIVE Network, LLC, and/or its affiliates and licensors. All rights reserved. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any computer language, in any form or by any means, electronic, mechanical, magnetic, optical, chemical, manual, or otherwise, without prior written permission. You have limited permission to make hard copy or other reproductions of any machine-readable documentation for your own use, provided that each such reproduction shall carry this copyright notice. No other rights under copyright are granted without prior written permission. The document is not intended for production and is furnished “as is” without warranty of any kind. All warranties on this document are hereby disclaimed including the warranties of merchantability and fitness for a particular purpose.

About ACTIVE Network, LLC

ACTIVE Network, LLC is a technology and media company that helps millions of people find and register for things to do and helps organizations increase participation in their activities and events.

For more information about ACTIVE Network, LLC products and services, please visit ACTIVEnetwork.com.

ACTIVE Network, LLC

717 North Harwood Street

Suite 2500

Dallas, TX 75201