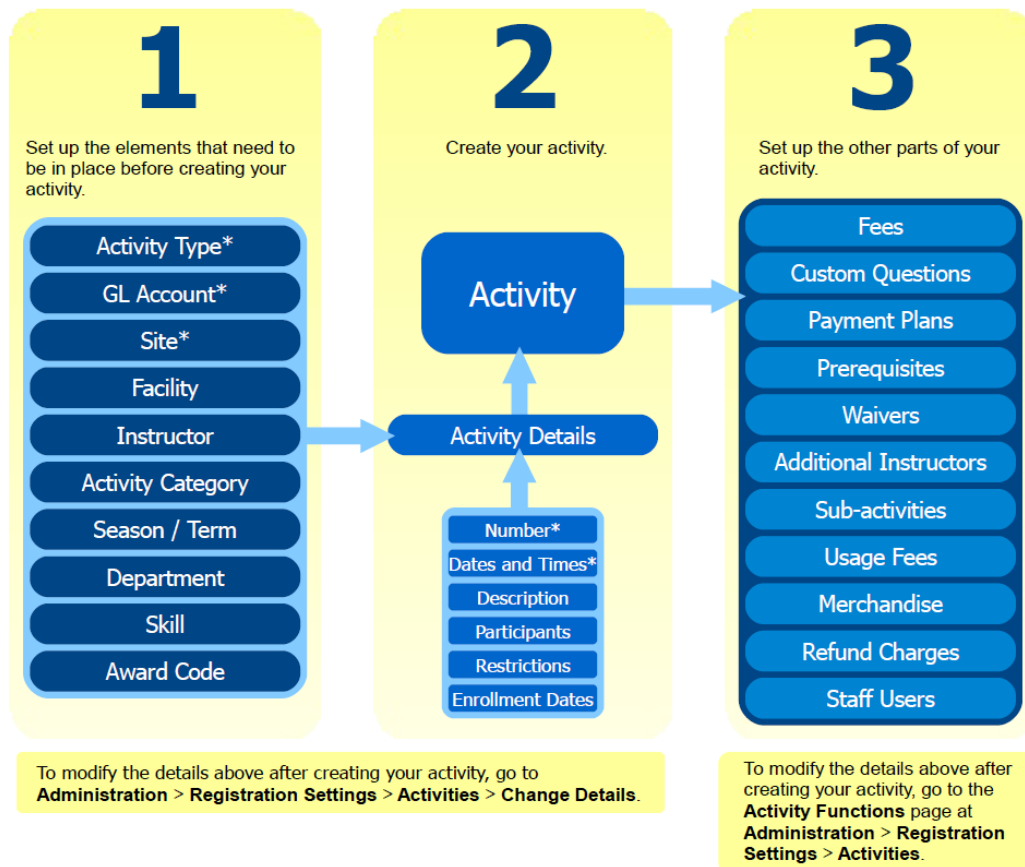


Overview of activities

Activities are the courses that your organization offers for customer registration. Before you can create a new activity, you will first need to make sure that several other elements in ACTIVE Net are set up properly so that your activity can use them.

The following diagram provides an overview of some of the elements to keep in mind while setting up an activity:



*Required. All other elements are optional.

Each activity includes several components that are configured on different pages in ACTIVE Net. Some components of an activity must be created prior to creating the activity (step 1), and others can only be configured on their own pages after creating the activity (step 3). To create the activity itself, use the **Activity Details** page (step 2). Once you have saved the activity in ACTIVE Net, then the **Activity Functions** page for that activity includes links back to the **Activity Details** page and to the other important pages for your activity (such as the **Activity Fees** page).

1. Before you create your activity, make sure that you have set up all of the entities that you plan to link to your activity. For example, if you plan to use a new GL account to track the revenue for this activity, create the new GL account before you start creating your new activity.

2. Once you have verified the elements in step 1, then create your activity and fill in its basic information on the **Activity Details** page. Once you save the information on the **Activity Details** page, your new activity will be saved in ACTIVE Net.
3. To complete the process and ensure that your activity is ready for enrollment, set up your fees, custom questions, and any other necessary activity components. Set the status of your activity to **Open** when you are ready to open the activity to customer enrollment.

Step 1: Before setting up your activity

Ask yourself the following questions to make sure you are ready to create your new activity:

Which activity type do I want to use for my new activity?

An activity's type determines the possible actions that are available for that activity, including the available options on the **Activity Details** page along with the available links on the **Activity Functions** page. If it's not obvious which activity type your new activity should use, [learn how to view the details of your existing activity types or make a new activity type](#), if necessary.

Which GL account do I want to use to track revenue for my new activity?

You will need to decide where you want the revenue for your new activity to end up for accounting purposes. Your organization will have its own way of grouping GL accounts: your policy might be to use a single GL account for many activities, or you might have a separate GL account for each activity. [Learn how to view your existing GL accounts or create a new one](#), if necessary.

Where will my new activity take place?

If the location of your new activity hasn't been finalized yet, you can create the activity without specifying a facility. [Learn how to view your existing facilities or create a new facility](#), if necessary.

Who will teach my new activity?

You can specify the instructor and/or the supervisor for the course either at the time you create the activity or at a later time. [Learn how to view your existing available instructors in ACTIVE Net or specify new instructors](#), if necessary.

Other questions

What [department](#) should I assign to my new activity, if any?

What [activity category](#) and/or [activity other category](#) should I assign to my new activity, if any?

What [skills](#) are associated with this activity, if any?

If this activity is a race, then what [award codes](#) are associated with this activity?

Step 2: Creating your activity

If your new activity is very similar to an activity that already exists, then the quickest way to get started is to make a **copy** of the activity that already exists and then make whatever minor changes you need to make to turn that copy into your new activity. [Learn how to copy an activity.](#)

Otherwise, create your new activity at **Administration > Registration Settings > Activities > Add New.** [Learn how to create a new activity.](#)

While you are creating your activity you will have the opportunity to specify all the information described in the section above, plus the following:

- The activity's **number**.
- The [season](#) and [term](#) that the activity is part of.
- The catalog **description** for the activity.
- The activity's **deferred revenue** setting.
- The [site](#) that the activity is associated with.
- The activity's meeting **dates and times** (see note below).
- The **restrictions**, if any, on who is eligible to enroll in the activity.
- The minimum and maximum number of **participants** allowed for the activity.
- The start dates for the activity's **enrollment**.
- The other **options** for this activity.

Different activities may have different options on the **Activity Details** page, because the information on the **Activity Details** page for an activity is determined by its activity type.

Note: If you schedule your activity to take place at a facility that is already in use at that time, then some of your activity's dates may not be scheduled. If this happens, your activity will have a status of **Date Conflicted** and your customers will not be able to enroll in it until you resolve the conflict. After you create your activity, make sure you check your activity's status on the **Activity Functions** page at **Administration > Registration Settings > Activities** to make sure it is not **Date Conflicted**.

Step 3: Configuring further activity details

Once you have created your activity, you can do more activity configuration from the **Activity Functions** page (**Administration > Registration Settings > Activities**). Different activities may have different links on their **Activity Functions** pages, because the links that appear on the **Activity Functions** page for an activity are determined by its activity type. Ask yourself the following questions after creating your activity to see if you need to do any further setup before starting enrollment:

- What fees should I charge for this activity?
[Learn how to add a fee or discount to your activity.](#)
- Do customers who enroll in this activity need to answer any questions as part of the enrollment process?
[Learn how to add custom questions to your activity.](#)
- Should there be a payment plan available for customers who enroll in this activity?
[Learn how to create a payment plan for your activity.](#)
- Does this activity have any prerequisites?
[Learn how to specify prerequisites for your activity.](#)
- Do customers need to sign a waiver in order to enroll in this activity?
[Learn how to add checklist items to your activity.](#)
- Does this activity have more than one instructor?
[Learn how to add more instructors to your activity.](#)
- Does this activity allow enrollees to take make-up classes?
[Learn how to configure make-up classes for your activity.](#)
- Is this activity a parent activity that will have sub-activities linked to it?
[Learn how to manage sub-activities for your activity.](#)
- Is there a usage fee for this activity?
[Learn how to enable a usage fee for your activity.](#)
- Will any POS products be sold as merchandise during enrollment for this activity?
[Learn how to link merchandise to your activity.](#)
- Should there be a charge for refunding this activity's fees?
[Learn how to set up a refund charge for your activity.](#)
- Should the ability to enroll customers in this activity be restricted to specific users?
[Learn how to specify which staff users are authorized to perform transactions involving this activity.](#)

Ongoing: Enrolling in and managing your activity

When you've finished setting up your activity, set the status of your activity to **Open**. At that point, you can start enrolling customers into it. Ask yourself the following questions to find out what type of enrollment you should use:

- Do I want to start with a standard enrollment into my activity?

[Learn how to enroll a customer in your activity.](#)

- Does my customer want to complete an enrollment that they have already paid a deposit for?

[Learn how to enroll a customer in your activity from a deposit.](#)

- Do I want to enroll a customer who is currently on my activity's waiting list?

[Learn how to enroll a customer in your activity from a waitlist.](#)

- Does my customer want to switch from a different activity into this activity?

[Learn how to transfer an enrollment into your activity.](#)

- Do I want to change something about an enrollment that has already been processed?

[Learn how to modify a customer's enrollment in your activity.](#)

Once the activity has begun, you can enter customer and/or instructor **attendance** for each of your activity's classes. [Learn how to enter attendance for your activity](#) at **Front Desk** > **Registrations** menu > **Attendance**.

Ongoing: Running activity reports

Use reports to see registration numbers, names, and attendance for your activity.

To see the names of the customers who have enrolled in your activity, go to **Reports > Registration Reports** and select one of the **Rosters**:

- [Roster - Brief](#)
- [Roster - Expanded](#)
- [Roster - with Payments](#)

To see registration numbers for your activity, go to **Reports > Registration Reports** and run the [Activity Totals](#) report.

To print out attendance sheets for your activity's instructors so that they can keep track of attendance for each class, go to **Reports > Registration Reports** and select one of the **Attendance Sheets**:

- [Activity Attendance Sheet](#)
- [Activity Attendance Sheet - Daily](#)