ACTIVE Net Quick Reference Guide: Activities

Date: May 2014

Search for or add customers

1) Click the **Customers** banner tab
2) Enter customer search criteria and click **Search Now**
3) Click the name of the desired customer account

    Tip: If the customer is not found, click **Add New Customer** to create a new customer account and then ensure that it is the active tab

Enroll in activities

1) Follow steps in "Search for or add customers"
2) In the Detail tab of the Customer Account dashboard, click **New Activity Enrollment**
3) Enter the activity search criteria and click **Search**

    Tip: If the activity can't be found, try lessening the search criteria
4) Click the name of the activity to be enrolled in
5) Review fees, check waivers, and answer questions if applicable
6) Click **Enroll**
7) To pay for the current transaction, proceed to step 13; to perform further enrollments, proceed to step 8
8) Click Registration>**Enroll**
9) Select, or search for and select an activity
10) Select, search for and select, or add a new customer as an enrollee
11) Review fees, check waivers, and answer questions if applicable
12) Click **Enroll**

    *Repeat steps 8-12 as necessary
13) Click **Pay**
14) Select, search for, or add a customer for the transaction
15) Click the **$** next to the desired payment type
16) Click **Pay and Finish**

Enroll onto wait lists

1) Follow steps 1-5 in "Enroll in activities"
2) In the Type of Registration widget, select **Add to Waiting List**
3) Click **Enroll**

    Tip: No fees are collected for enrolling into a waiting list
4) Click **Finish**

Enroll/remove/change position from wait lists

1) Follow steps in "Search for or add customers"
2) In the Detail tab of the Customer Account dashboard, find the activity and click **Wait Listed**
3) Click **Enroll from Waiting List**

    Tip: Alternatively, click **Remove from Waiting List** to remove customer from waiting list, or click **Change Position** to change customer's waiting list position
4) Review fees if applicable
5) Follow steps 12-16 in "Enroll in activities"

Transfer enrollments

1) Follow steps in "Search for or add customers"
2) In the Detail tab of the Customer Account dashboard, find the activity to be transferred out of and click **Transfer**
3) Enter search criteria for the activity to be transferred into and click **Search**
4) Click the name of the activity to be transferred into
5) Review fees and withdrawal date if applicable and enter a transfer reason
6) Click **Refund**
7) Follow steps 11-12 in "Enroll in activities"
8) Click **Pay** if a payment is required or click **Refund** if a refund is being issued

    Tip: If there is no monetary transaction, click **Finish** to complete the transaction
9) Select, search for, or add a customer for the transaction
10) Click the **$** next to the desired payment/refund type
11) Click **Pay and Finish** if a payment is required or click **Refund and Finish** if a refund is being issued

Refund/withdraw enrollments

1) Follow steps in "Search for or add customers"
2) In the Detail tab of the Customer Account dashboard, find the activity to be refunded/withdrawn and click **Refund**

3) Review fees and withdrawal date if applicable and enter a withdrawal reason

   Tip: To provide a refund without withdrawing from the activity, uncheck the box next to **Withdraw from activity?** in the Fees widget
4) Click **Refund**
5) Click **Refund**

   Tip: If there is no monetary transaction, click **Finish** to complete the transaction
6) Select, search for, or add a customer for the transaction
7) Click the **$** next to the desired refund type
8) Click **Refund and Finish**

Generate activity rosters

The Roster – Brief report gives an overview of enrolled participants per activity

1) Click the **Reports** banner tab
2) Click Registration Reports>**Roster – Brief**
3) Enter information and select filters and options as necessary
4) Click **Run Report**

Generate attendance sheets

The Activity Attendance Sheet report is used to track activity attendance with a grid of enrollees and activity dates

1) Click the **Reports** banner tab
2) Click Registration Reports>**Activity Attendance Sheet**
3) Enter information and select filters and options as necessary
4) Click **Run Report**