ACTIVE Net Quick Reference Guide: Facilities

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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

Reserve facilities

1) Follow steps in "Search for or add customers"
2) In the Actions tab of the Customer Account dashboard, click New Transactions>**New Receipt**
3) Click Reserve>**Schedule Reservations**
4) In the Bookable Resources Selection Criteria drop-down menu, enter facility search criteria
5) In the Bookable Items drop-down menu, check the box next to the facility to be reserved

   Tip: Multiple facilities can be selected
6) Select the desired reservation date(s) in the **Date Chooser** drop-down menu

   Tip: For multi-day reservations, hold Ctrl+Click on the dates
7) In the Schedule Viewer, click and drag across the desired reservation time

   Tip: It is possible to drag across multiple facilities and dates

   Tip: Adjust schedule viewer options as necessary in the **Layout Properties** drop-down menu
8) In the Create New Reservation popup, enter Event Name, Event Attendance, Event Type, Schedule Type, and other details as necessary

   Tip: This popup allows easy adjustments to dates and times
9) Click **Reserve Selected**
10) To set up repeat bookings, proceed to step 11, otherwise, skip to step 15 to complete the booking
11) Under a booking to be repeated In the Pending Reservations drop-down menu, click **Repeat**
12) In the Repeat Bookings popup, select options to Repeat by Period or select dates to Repeat on Selected Dates
13) Click **Submit**
14) Click **Reserve Selected**

    *Repeat steps 11-14 as necessary
15) To complete the booking, in the Pending Reservations drop-down menu, click **Book It Now**
16) Confirm if the selected customer is correct, otherwise, select a different customer by clicking **Find a different customer** in the Selected Customer widget before proceeding with the following:
    - If the customer is not booking on behalf of a company, proceed to step 16;
    - If the customer is booking on behalf of a company that is linked to the customer account, select the company from the drop-down list;
    - If the customer is booking on behalf of an existing company, click **Attach to an Existing Company**, then search for and select the company;
    - If the customer is booking on behalf of a new company, click **Attach to a New Company**, enter company details, then click **Save**
17) Click **Continue Reservation**
18) Review fees and payment plan, check waivers, and answer questions if applicable
19) Click **Submit**
20) Click **Pay**

    Tip: If no payment is to be made, click **Finish** to complete the transaction
21) Select, search for, or add a customer for the transaction
22) Click the **$** next to the desired payment type
23) Click **Pay and Finish**

    Tip: To print or email the permit, click the permit number on the receipt, click Audit/Review>Show Permit, then click Print or Send Email

Find existing permits

1) Click the **Front Desk** banner tab
2) In the left navigation bar, click Reserve>**Permits**
3) Find the desired permit as follows:
   - If the Permit Number or Original Request Number are known, enter them as necessary in the Direct Access widget and click **Submit**;
   - if the Permit Number or Original Request Number are not known, enter permit search

criteria in the Search Criteria widget, click **Search**, then click the permit number under the Permit Number column

Modify permit dates, facilities, and times

1) Follow steps in "Find existing permits"
2) In the Functions widget, click Reservation Details>**Resource Scheduler**
3) Modify the permit as follows:
   - To modify permit dates, times, and details, click **Edit Permit**, modify dates, times, Event Name, Event Attendance, Event Type, Schedule Type, and other details as necessary, then click **Reserve Selected**;
   - To set up repeat bookings, click **Repeat** under a booking to be repeated, select options to Repeat by Period or select dates to Repeat on Selected Dates, click **Submit**, then click **Reserve Selected**;
   - To modify facilities, dates, times, and details, follow steps 4-7 in "Reserve facilities," click **Edit Reservation** in the Update Reservation Bookings popup, modify Event Name, Event Attendance, Event Type, Schedule Type, and other details as necessary, then click **Reserve Selected**
4) Click **Return to Permit**
5) In the Financial widget, click **Apply Pending Charge Modifications** if applicable

Modify permit charges

1) Follow steps in "Find existing permits"
2) In the Functions widget, click Financial Detail>**Review/Modify Charges**
3) Add new charges, add standard charges back, delete charges, or make a payment as necessary

Approve permits

Permits that require a manager's approval will be in tentative status

1) Click the **Front Desk** banner tab
2) In the left navigation bar, click Reserve>**Approve Permits**
3) Click the status of the permit to be approved
4) In the Workflow Stages widget, click **Manager Approval**
5) Select **Approve** and provide a comment if applicable
6) Click **Submit**
7) In the Permit Status widget, select **Approved**
8) Click **Save**

Print or email permits

1) Follow steps in "Find permits"
2) In the Functions widget, click Audit/Review>**Show Permit** in the Functions widget
3) Click **Print** or **Send Email** as necessary

Refund permits

1) Follow steps in "Find permits"
2) In the Functions widget, click Financial Detail>**Refund Charges**
3) Review amount(s) to be refunded

   Tip: If no payments have been made towards the permit, no refund is required and any payment plan on account for the permit will be removed only upon cancellation of the permit
4) Click **Refund**
5) Click **Refund**
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**

Refund deposits

1) Follow the steps in "Find existing permits"
2) In the Functions widget, click Financial Detail>**Refund Deposit**
3) Claim all or some of the deposit by clicking **Claim**, otherwise, click **Refund**
4) Review amount to be refunded
5) Click **Submit**
6) Follow steps 5-7 in "Refund permits"

Claim deposits

1) Follow the steps in “Find existing permits”
2) In the Functions widget, click Financial Detail>**Claim Deposit**
3) Select a charge from the drop-down menu under the Claim Charge column
4) Review amount to claim and adjust as necessary
5) Click **Claim**

Cancel permits

1) Follow the steps in “Find existing permits”
2) In the Functions widget, click Permit Status>**Cancel Permit**

   Tip: Refund charges, deposits, and add charges as necessary before cancelling a permit
3) Click **Cancel Permit Now**