ACTIVENet Insights Interactive reports
(v5.67)

Version	Date
5.67	Jan 12, 2022

ACTIVE Network, LLC

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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.

If you have any questions about this document, please contact the ACTIVENet Support team using the information below.

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Overview

ACTIVENet now includes a new interactive reporting portal named ACTIVENet Insights, where you can run interactive reports and modify them to match your own requirements. You can customize these reports by formatting, filtering, and sorting data in individual columns and then save your customizations for reuse in the future.

In addition to customizing how report data displays, you can use ACTIVE Net Insights to easily view customers and transactions that make up the totals in your reports. Reports in this environment load more quickly and are easily exported in raw format to a spreadsheet.

Note: Please use the Chrome browser to view ACTIVENet Insights. Microsoft Internet Explorer and Microsoft Edge Browsers are not supported.

Interactive reports

ACTIVENet Insights provides folders by category and multiple interactive reports. An interactive report template requires user to select filters and then generates a report based on these filters. This document describes each of the interactive report template.

Each interactive report enables users to explore 13 months of data across all applicable sites through a simple and intuitive web browser interface.

ACTIVENet Insights also includes a Dashboard reportlets folder with different dashboards. Dashboards are pre-defined chart-formatted reports (for example, in line, column or pie chart formats) which create a simplified, graphical representation of the required data set and provide appealing, data-rich reports that can quickly convey trends. For more information, refer to [Activity Participation Dashboard](#).

Activities

Activity Configuration

The **Activity Configuration** report provides staff users with detailed configuration information per single activity season so that they can easily manage multiple activities. The report result page lists all matching activities and their configurations.

To run the **Activity Configuration** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Activities**.
3. In the **Repository** area, click **Activity Configuration**.

Specify the following activity configuration properties to filter workstations:

- Activity Season (required, single selection, excluding any activity seasons marked as 'Prevent Further Use')

- Site

- Center (excluding those marked as 'Prevent Further Use')

- Activity Status

This report only includes the detail version. The following information is included in the detail version. To view description of each field, please refer to activity fields and activity charge fields.

Column Name	Hidden
Activity Number	
Activity Name	
Site	
Primary Charge Name	
Activity Charge Name	
Activity Charge Type	
Allow Override	
Fee Order	
Customer Type	
Description	
Primary Fee?	

GL Account Name	
GL Account Number	
Charge Amount	
Discountable?	Yes
Exclude from Payment Plans?	Yes
Trial Class Fee?	Yes
Use Regional Pricing?	Yes
Pro-rate during refund?	Yes
Pro-rate during enrollment?	Yes
Discount Order	
Discount Group Number	
Discount Type	
Discount Percent	
Fixed Amount	
Trial Class Discount?	Yes
Exclude other discounts in same group number?	Yes
Type of Scholarship	
Scholarship Percentage	
Scholarship Default Amount	
Trial Class Scholarship?	Yes
Taxable by tax 1?	Yes
Taxable by tax 2?	Yes
Taxable by tax 3?	Yes
Taxable by tax 4?	Yes
Taxable by tax 5?	Yes
Taxable by tax 6?	Yes
Taxable by tax 7?	Yes
Taxable by tax 8?	Yes
Prefill Condition Override	Yes
Activity Team/Group Category	Yes
Team Prefill Condition	Yes
Online Question	Yes
Activation Code	Yes
Allow Qty to be selected online?	Yes
Minimum Qty Allowed	Yes
Maximum Qty Allowed	Yes

Minimum People of Multi-person Registration	
Maximum People of Multi-person Registration	
Minimum Number of Registrations	
Maximum Number of Registrations	
Count all enrollments?	
Minimum Activities of Multi-activity Registration	
Maximum Activities of Multi-activity Registration	
Applies to all enrollments up to max?	
Minimum Members of Team Registration	
Maximum Members of Team Registration	
Minimum Age	
Maximum Age	
Activation Date	
Expiration Date	
Applies to all enrollments up to max?	
Minimum Members of Team Registration	

Activity Charge Configuration

The **Activity Charge Configuration** report provides staff users with detailed activity charge configuration information so that staff users can easily manage multiple activities and their charges. The report result page lists all matching activities and their charge configurations.

To run the **Activity Configuration** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Activities**.
3. In the **Repository** area, click **Activity Charge Configuration**.

Specify the following activity configuration properties to filter workstations:

- **Date Range** (required): filter activities by the activity start date (maximum 1 month)
- **Activity Charge Type** (optional)
- **Activity Season** (optional): excludes seasons marked as 'Prevent Further Use'
- **Site** (optional)
- **Center** (optional): excludes centers marked as 'Prevent Further Use'
- **Activity Status** (optional)

This report only includes the detail version. The following information is included in the detail version. To view description of each activity field, please refer [here](#).

Column Name	Hidden
Activity Number	
Activity Name	
Department	
Date Range	
Days of Week	
Time Range	
Age Range	
Gender	
Minimum Participant	
Maximum Participant	
Maximum Enrollment Online	
Maximum Teams	

Maximum Team Player	
No Internet Registration	
Primary Fee	
Online Notes	
Category	Yes
Second Category	Yes
Activity Type	Yes
Activity Season	Yes
Activity Term	Yes
Site	
Site Phone Number	
Site Address1	
Site Address2	
Site City	Yes
Site State	Yes
Site Zip Code	Yes
Geographic Area	Yes
Center	
Center Phone Number	
Center Address1	
Center Address2	
Activity Status	Yes

Activity Statistics

Use the **Activity Statistics** report to understand and compare activity enrollment rates from year to year so that you are in a better position to increase enrollment rates for specific activities.

To run the **Activity Statistics** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Activities**.

3. In the **Repository** area, click **Activity Statistics**.

Specify the following input controls when you run the **Activity Statistics** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by activity start date.
Activity Site	Filter the report by site.
Center Name	Filter the report by center. The centers that display depend on the Site that you have selected above.
Supervisor	Filter the report by the activity supervisor.
Activity Status	Select from one or more of the following statuses: • Closed • Cancelled • Tentative • On Hold • Open • Retired • Date Conflicted
Grouping	Group and total the activities in this report using one of the following grouping methods: • Activity Category • Activity Number • Activity Name • Activity Other Category

The following information is included in the final output of the **Activity Statistics** report:

Column Name	Description
Site	The site associated with this activity.

Center	The center associated with this activity.
Enrollment Status	One of the following will display: • Under Minimum – The number of enrollees is zero or less than the minimum number of enrollees required for this activity. • Under Maximum – The number of enrollees is greater than or equal to the minimum number of required enrollees and is less than the maximum number of enrollees allowed for this activity. • Full – The number of enrollees is equal to or greater than the maximum number of enrollees allowed for this activity. • Full with Waiting List – Same as Full, but this activity also has a waiting list.
Supervisor	The supervisor assigned to this activity.
Activity Status	The status of this activity.
Activity Category	The category assigned to this activity.
Activity Other Category	The activity other category assigned to this activity
Activity Type	The activity type assigned to this activity.
Season	Season in which the activity occurs.
Term	Term in which the activity occurs.
Instructor	Instructor assigned to this activity.
Activity #	The number of this activity.
Activity Name	The name of this activity.
Activity/SubActivity	Whether the activity is an activity or a sub-activity
Activity Start Date	This activity's start date.
Activity End Date	This activity's end date.
Min Registration	The minimum number of registrations required for this activity.
Max Registration	The maximum number of registrations allowed for this activity.
# of Registrations	The total number of registrations currently in this activity.
Fill Rate	The Fill Rate is calculated using the following formula: % (# of Registrations / Max Registration).
Total Hours	The total number of hours that this activity uses.
Number of Sessions	The total number of actual days associated with this activity.
Holds	The number of enrollees in this activity who have enrolled with a deposit.
Waits	The number of people on this activity's waitlist.
Open	The number of open spots in this activity, calculated using the following formula:

	Max Registration – # of Registrations – Holds
Revenue	The total revenue amount for this activity.

Activity Wish List

Use the **Activity Wish List** report to view a list of customers who have added activities in a season to their wish list

To run the **Activity Statistics** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Activities**.

3. In the **Repository** area, click **Activity Statistics**.

Specify the following input controls when you run the **Activity Wish List** report:

Input Control Name	Description
Activity Status	Select from one or more of the following statuses: • Closed • Cancelled • Tentative • On Hold • Open • Retired Date Conflicted
Activity Season	Filter the report by selecting one season.
Activity Site	Filter the report by site.
Center Name	Filter the report by center. The centers that display depend on the Site that you have selected above.

The following information is included in the final output of the **Activity Wish List** report:

Column Name	Description
Activity Number	The number of this activity.
Activity Name	The name of this activity.
Activity Status	The status of this activity.
Site	The site associated with this activity.
Activity Season	Season in which the activity occurs.
Activity Term	Term in which the activity occurs.
Maximum participant	The maximum number of participants allowed for this activity.
Available Slot	The number of the activity's available slot.

Allow Waiting List	Whether this activity allows waiting list.
Customer ID	Customer ID
Customer First Name	The customer's first name
Customer Last Name	The customer's last name
Customer Email	The customer's email address
Customer Home Phone	The customer's home phone number
Customer Work Phone	The customer's work phone number
Added To Wishlist Date	The date on which the customer was added to the waiting list
Activity Last Modified Date	The date on which the activity was last updated.
Enrolled Date	The date on which the customer was enrolled.

Private Lesson Registration

Use the **Private Lesson Registration** report to view a list of customers who are registered in private lessons which start during the specified date range and in the specified site. The Summary report also includes each customer's total number of lessons, hours and revenue information.

To run the **Private Lesson Registration** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Activities**.
3. In the **Repository** area, click **Private Lesson Registration**.

Specify the following input controls when you run the **Private Lesson Registration Detail** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by activity start date.
Site	Filter the report by site.

From the **Summary** version of the **Private Lesson Registration** report, you can click a customer ID to view the **Detail** version.

The following information is included for the **Private Lesson Registration** report:

Column Name	Available on	Description	Hidden
Activity Number	Summary Detail	Private lesson activity's activity number.	
Activity Name	Summary Detail	Private lesson activity's activity name.	
Activity Season	Summary	Private lesson activity's activity season.	
Activity Start Date	Summary Detail	This private lesson activity's start date.	
Activity End Date	Summary Detail	This private lesson activity's end date.	
Activity Type	Summary Detail	Private lesson activity's activity type.	
Activity Department	Summary Detail	Private lesson activity's activity department.	

Site	Summary Detail	Site to which this private lesson activity belongs	
Center	Summary	Center to which this private lesson activity belongs	
Customer ID	Summary Detail	Customer ID.	
Customer First Name	Summary Detail	Customer's First Name.	
Customer Last Name	Summary Detail	Customer's Last Name.	
Instructor ID	Summary Detail	Instructor ID.	
Instructor First Name	Summary Detail	Instructor's First Name.	
Instructor Last Name	Summary Detail	Instructor's Last Name.	
Booking Type	Summary Detail	Booking type: • Booked: the customer reserved the instructor and private lessons • Pre-booked: the customer reserved the instructor but without any private lessons.	
Number of lessons	Summary	The total number of private the customer reserved	
Duration Hours	Summary	The total number of hours of reserved private lessons	
Lesson Date	Detail	Date when the private lesson occurs. For a pre-booked private lesson, this column displays 'TBD'.	
Lesson Time	Detail	Time when the private lesson occurs. For a pre-booked private lesson, this column displays 'TBD'.	
Lesson Duration	Detail	The duration of the private lesson. Unit: Minute.	
Facility	Detail	Name of the facility associated with the private lesson activity. If multiple facilities are associated with the activity, then the facility with the smallest facility ID is displayed.	
Original Transaction Date	Detail	The date on which the private lesson was sold to the customer.	
Original Transaction Number	Detail	The receipt number of the original transaction.	

Financial

Account Distribution

Use the **Account Distribution** report to view how system revenue has been distributed between GL Accounts to update and balance the external accounting system.

To run the **Account Distribution** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.

3. In the **Repository** area, click **Account Distribution**.

Specify the following input controls when you run the **Account Distribution** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by GL entry posting date.
Revenue Site	Filter the report by the site where revenue is recorded.
Transaction Site	Filter the report by the site where transactions are processed.
Department	Filter the report by the financial departments.
GL Account	Filter the report by a specific GL Account.
Grouping	Group and total the transactions in this report by one of the following grouping methods: • Account Name • Revenue Site • Date

From the **Summary** version of the **Account Distribution** report, you can click an account name or revenue site to view **Detail** version of transactions in that grouping.

The following information is included for the **Account Distribution** report:

Column Name	Available on	Description	Hidden

Revenue Site	Summary Detail	The site associated with these transactions. This column only displays if you have selected it as your Grouping method in the input controls above.	
Account Name	Summary Detail	The name of the GL Account to which the journal entries are posted to.	
Date	Summary Detail	The total for each GL account is grouped by date in the summary report. This column only displays if you have selected it as your Grouping method in the input controls above.	
Account Number	Detail	The GL Account Number associated with the GL Account.	
Account Type	Summary Detail	The account type includes: • Asset • Liability • Income • Capital • Expense It is blank if there is no account type for the GL account.	Yes
Transaction (Count)	Summary	The number of account postings.	
Credited	Summary Detail	The amount posted as credit to the associated GL Account.	
Debited	Summary Detail	The amount posted as debit to the associated GL Account.	
Transferred	Summary Detail	The sum of the Debited and Credited columns.	
Receipt Number	Detail	The receipt number associated with the GL posting.	
Posting Date	Detail	The date when the GL posting occurred.	
System User	Detail	The name of the system user who performed the transaction.	
Charge Name	Detail	The charge name for the transaction.	
Description	Detail	The description of the transaction.	
Reason	Detail	The Reason column displays transaction withdrawal or transfer reasons, for example, activity transfer, or membership cancellation.	Yes
Customer ID	Detail	Customer ID	Yes
Last Name	Detail	Customer last name	Yes

First Name	Detail	Customer first name	Yes

Agency Payment

Use the **Agency Payment** report to view payment totals and fees incurred for payments so that you can balance those totals with your bank statements and update your external accounting systems. You can also use these totals to understand your net sales revenue so that you can analyze trends and determine whether you are meeting expectations.

To run the **Agency Payment** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.
3. In the **Repository** area, click **Agency Payment**.

Specify the following input controls when you run the **Agency Payment** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by receipt date.
Transaction Site	Filter the report by the site where transactions are processed.
Void Status	Select from one or more of the following void statuses for transactions to display in the report: • Void • Not Voided
Grouping	Group and total the transactions in this report using one of the following grouping methods: • Date • Transaction Site • Revenue Site • GL Account

From the **Summary** version of the **Agency Payment** report, you can click a date or a transaction site in the report to view the **Detail** version that make up that grouping. The following information is included for the **Agency Payment** report:

Column Name	Available on	Description
Transaction Site	Summary Detail	The site associated with these transactions. This column only displays if you have selected it as your Grouping method in the input controls above.

Date	Summary	The date associated with these transactions. This column only displays if you have selected it as your Grouping method in the input controls above.
Revenue Site	Summary Detail	The revenue site associated with these transactions. This column only displays if you have selected it as your Grouping method in the input controls above.
GL Account	Summary Detail	The GL Account associated with these transactions. This column only displays if you have selected it as your Grouping method in the input controls above.
GL Name	Summary Detail	The name of the GL Account associated with these transactions. This column only displays if you have selected GL Account as your Grouping method in the input controls above.
Receipt Amount	Summary Detail	The sum of all charges included in these receipts, whether paid or unpaid. If the 'Pass AUI credit card surcharges (processing fees) to consumers' feature is enabled, then this column also includes credit card surcharges.
Amount Paid	Summary	The sum of amounts paid for these receipts.
CC/ECP/Debit Amount	Summary Detail	The sum of amounts paid by credit card/electronic check payment/debit card. This column is displayed when the report is grouped by Revenue Site or GL Account.
Credit Card	Summary Detail	The sum of amounts paid by credit card. This column is displayed when the report is grouped by Date or Transaction Site.
ECP	Summary Detail	The sum of amounts paid by Electronic Check Payment. This column is displayed when the report is grouped by Date or Transaction Site.
Debit	Summary Detail	The sum of amounts paid by debit card. This column is displayed when the report is grouped by Date or Transaction Site.
Processing Fee	Summary Detail	The credit/debit card company or bank portion of the fee. This amount includes processing fees for credit cards, electronic check payments, and debit cards.
Convenience Fee	Summary Detail	The ACTIVE Network's fee for transactions processed through the Consumer User Interface (CUI).
Transaction Fee	Summary Detail	The ACTIVE Network's fee for transactions processed through the Administrative User

		Interface (AUI)/staff site, such as payments processed through the Front Desk module.
Amount Due to Agency	Summary Detail	The net amount due to your organization from the ACTIVE Network considering these fees. This amount is calculated using the following formula: Amount Due to Agency = CC/ECP/Debit Amount – Convenience Fee – Processing Fee – Transaction Fee
Transaction Date	Detail	The date when this transaction was processed.
Transaction Time	Detail	The time when this transaction was processed.
Receipt Number	Detail	The issue number of this receipt.
Voided Status	Detail	This column will display either Voided or Complete depending on the voided status of this receipt.
Date	Detail	The date associated with this transaction. This column only displays if you have selected it as your Grouping method in the input controls above.
Amount Paid	Detail	The amount paid for this receipt.

Agency Payment – Split Amounts

Use the **Agency Payment – Split Amounts** report to:

- view amounts due to the agency from transactions made in ACTIVENet

- reconcile ACTIVENet charged amounts and customer-paid amounts according to the agency's fee contract.

To run the **Agency Payment – Split Amounts** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.

3. In the **Repository** area, click **Agency Payment – Split Amounts**.

Specify the following input controls when you run the **Agency Payment – Split Amounts** report:

Input Control Name	Description
Start/End Range	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by receipt date
Transaction Site	Filter the report by the site where transactions are processed.
Void Status	Select from one or more of the following void statuses for transactions to display in the report: • Void • Not Voided For a transaction which was created and then voided: • when both Voided and Not Voided filters are selected, the receipt is included twice and marked Voided and Not Voided: • when only the Voided filter is selected, the receipt is included once and marked Voided. • when only the Not Voided filter is selected, the receipt is excluded from the report.

The following information is included for the **Agency Payment – Split Amounts** report:

Column Name	Description
Transaction Date	The date when this transaction was processed

Transaction Time	The time when this transaction was processed
Transaction Site	The site where the transaction was processed.
Voided Status	This column will display either Voided or Not Voided depending on the voided status of this receipt
Net Charge	The net charge amount imposed by the organization to the end-user, excluding customer paid: • Convenience fees • Transaction fees • Processing fees • Indirect taxes
Absorbed Transaction Fee	The transaction fee amount absorbed by the organization
Customer Paid Transaction Fee	The transaction fee amount paid by the customer (excludes its indirect taxes)
Absorbed Convenience Fee	The convenience fee amount absorbed by the organization
Customer Paid Convenience Fee	The convenience fee amount paid by the customer (excludes its indirect taxes)
Absorbed Indirect Tax	The indirect tax amount absorbed by the organization
Customer Paid Indirect Tax	The indirect tax amount paid by the customer
Credit Card Amount	The amount paid using credit card The amount posted to GL accounts and exclude the following amounts: • credit card fee surcharges • non-absorbed convenience fees and indirect tax surcharges on non-absorbed convenience fees.
ECP Amount	The amount paid using ECP The amount posted to GL accounts and exclude the following amounts: • credit card fee surcharges • non-absorbed convenience fees and indirect tax surcharges on non-absorbed convenience fees.
Debit Amount	The amount paid using debit card The amount posted to GL accounts and exclude the following amounts: • credit card fee surcharges • non-absorbed convenience fees and indirect tax surcharges on non-absorbed convenience fees.
Absorbed Processing Fee	The processing fee amount absorbed by the organization
Customer Paid Processing Fee	The processing fee amount paid by the customer
Receipt Amount	The sum of all charges included in these receipts, whether paid or unpaid

	If the 'Pass AUI credit card surcharges (processing fees) to consumers' feature is enabled, then this column also includes credit card surcharges.
Amount Paid	Total amount the customer paid including all payment types on this payment receipt
The total amount posted to GL accounts and exclude the following amounts: • credit card fee surcharges • non-absorbed convenience fees and indirect tax surcharges on non-absorbed convenience fees.
Receipt Number	The receipt number of this receipt.
Amount Due to Org	The net amount due to your organization from the ACTIVE Network considering these fees.
This amount is calculated using the following formula:
Amount Due to Org = CC/ECP/Debit Amount – Convenience Fee – Processing Fee – Transaction Fee

The main differences between the **Agency Payment – Split Amounts** report and the **Agency Payment** report are as follows:

- The **Agency Payment** report has both summary and detailed versions. The **Agency Payment – Split Amounts** report only has a detailed version.

- The **Agency Payment** report displays only fee totals. The **Agency Payment – Split Amounts** report displays both the agency's absorbed fees and customer-paid fees, for example:

    o   Absorbed Transaction Fee

    o   Customer Paid Transaction Fee

    o   Absorbed Convenience Fee

    o   Customer Paid Convenience Fee

    o   Absorbed Indirect Tax

    o   Customer Paid Indirect Tax

    o   Absorbed Processing Fee

    o   Customer Paid Processing Fee

- For the ACTIVENet AUI indirect tax feature, the **Agency Payment – Split Amounts** report displays **Absorbed Indirect Tax** and **Customer Paid Indirect Tax** columns.

- The **Agency Payment – Split Amounts** report has an additional **Net Charge** column which displays the net charge amount.

AR Aging

Use the **AR Aging** report to view customer account balances and follow up on accounts with outstanding amounts or large credits.

To run the **AR Aging** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.
3. In the **Repository** area, click **AR Aging**.

Specify the following input controls when you run the **AR Aging** report:

Input Control Name	Description
As of Date	Select the date for the report using the calendar or enter the date in YYYY-MM-DD format. The account receivable transactions occurred on and before the As of Date are included in the report output.

Customer ID	Customer	Company ID	Company	Future	Current	1 to 30 days	31 to 60 days	61 to 90 days	91+	Total Amount Owed
1322	Mary Green			$0.00	$0.00	$99.19	$0.00	$0.00	$0.00	$99.19
1326	Seth Frank			$0.00	$0.00	$469.19	$0.00	$0.00	$0.00	$469.19
		326	Five Stars Company	$0.00	$0.00	$0.00	$0.00	$138.00	$220.00	$358.00
			Grand Totals	**$0.00**	**$0.00**	**$568.38**	**$0.00**	**$138.00**	**$220.00**	**$926.38**

Filters Used in Report:
As of Date: **03/25/2016**

From the **Summary** version of the **AR Aging** report, you can click an account name or revenue site to view **Detail** version of transactions in that grouping.

The following information is included for the **AR Aging** report:

Column Name	Available on	Description	Hidden
Customer ID	Summary Detail	The customer ID that the account receivable is linked to.	
Customer	Summary Detail	The customer name that the account receivable is linked to.	
Company ID	Summary Detail	The company ID that the account receivable is linked to.	
Company	Summary Detail	The company name that the account receivable is linked to.	
Email	Summary Detail	The email address for the customer or organization	
Future	Summary Detail	Accounts Receivable amount which is not yet due.	

		For example, when due date is later than the specified As of Date.	
Current	Summary Detail	Accounts receivable amount which is due on the specified As of Date	
1 to 30 days	Summary Detail	Accounts receivable amount overdue for 1 to 30 days based on the specified As of Date	
31 to 60 days	Summary Detail	Accounts receivable amount overdue for 31 to 60 days based on the specified As of Date	
61 to 90 days	Summary Detail	Accounts receivable amount overdue for 61 to 90 days based on the specified As of Date	
91 +	Summary Detail	Accounts receivable amount overdue for over 91 days based on the specified As of Date	
Total Past Due	Summary Detail	Past-due amounts on the specified As of Date	
Total Amount Owed	Summary Detail	The sum of all the A/R aging amounts displayed in the report.	
Receipt Number	Detail	The receipt number that the account receivable associated with.	
Receipt Date	Detail	The date when the original receipt was issued.	
System User	Detail	The name of the system user who performed the transaction	Yes

AR Summary

Use the **AR Summary** report to view account receivable summaries for each customer in the specified revenue site.

To run the **AR Summary** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.
3. In the **Repository** area, click **AR Summary**.

Specify the following input controls when you run the **AR Summary** report:

Input Control Name	Description
As of Date	Select the date for the report using the calendar or enter the date in YYYY-MM-DD format. The account receivable transactions occurred on and before the As of Date are included in the report output.
Revenue Site	Filter the report by the site where revenue is recorded.
Transaction Site	Filter the report by the site where the transaction occurs.
Module	Filter charges which are processed through particular modules. 1. Registration 2. Flex Registration 3. Facilities 4. Membership 5. Equipment Loan 6. POS 7. All others
Package category	Filter this report to view account receivable summaries for only specific membership categories,
Group By	Group and total the transactions in this report using one of the following grouping methods: • Revenue Site • Transaction Site • Revenue GL Account

From the **Summary** version of the **AR Summary** report, you can click an account name or revenue site to view **Detail** version of transactions in that grouping.

The following information is included for the **AR Summary** report (note: customers with zero **Total Amount Owed**, **Linked Credit** and **Total Amount Due** are excluded from the **AR Summary** report):

Column Name	Available on	Description	Hidden
Revenue Site	Summary Detail	The revenue site associated with the transaction. This column only displays if you have selected it as your Grouping method in the input controls above.	
Transaction Site	Summary Detail	The site where transaction occurs.	
Revenue GL account	Summary Detail	The revenue GL accounts associated with the transactions. This column only displays if you have selected it as your Grouping method in the input controls above.	
Customer ID	Summary Detail	The customer ID that the account receivable is linked to.	
Customer	Summary Detail	The customer name that the account receivable is linked to.	
Company ID	Summary Detail	The company ID that the account receivable is linked to.	
Company	Summary Detail	The company name that the account receivable is linked to.	
Total Amount Owed	Summary Detail	The unpaid amount for the customer until the As of Date	
Linked Credit	Summary Detail	The linked credit to this account receivable	
Total Amount Due	Summary Detail	= Total amount owed – Linked credit	
Home Phone	Summary	Displays the home phone for a customer and Phone 1 for a company. It is blank if there is no home phone specified for the customer/company.	Yes
Cell Phone	Summary	Displays the cell phone for a customer and Phone 3 for a company. It is blank if there is no cell phone specified for the customer/company.	Yes
Work Phone	Summary	Displays the work phone for a customer and Phone 2 for a company. It is blank if there is no work phone specified for the customer/company.	Yes
Email	Summary	Displays the customer/company's email address. It is blank if there is no email address specified for the customer/company.	Yes

Address	Summary Detail	Displays customer's residential address for a customer and company's address for a company.	Yes
City	Summary Detail	Displays the customer/company's city.	Yes
State	Summary Detail	Displays the customer/company's state.	Yes
Postal code/Zip code	Summary Detail	Displays the customer/company's zip code.	Yes
Home Phone	Detail	Displays the home phone for a customer and Phone 1 for a company.	
Package	Detail	Displays the membership package with which the AR transaction is associated.	Yes
Account Number	Detail	GL Account Number	
Receipt Number	Detail	Receipt Number	
Receipt Date	Detail	The issue date for the receipt. Format: MM/DD/YYYY	
Module	Detail	Module associated with the account receivable	
Description	Detail	Description of the receipt	

Coupon Usage

Use the **Coupon Usage** report to view the summary report which displays coupon usage statistics, and then click a coupon code to view the activity, program, membership package or merchandise for which the coupon was redeemed.

To run the **Coupon Usage** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.

3. In the **Repository** area, click **Coupon Usage**.

Specify the following input controls when you run the **Coupon Usage** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by coupon usage date.
Transaction Site	Filter the report by the site where transactions are processed.
Coupon Type	Filter the report by the required coupon type.
Grouping	Group and total the transactions in this report using one of the following grouping methods: • Coupon Code • Coupon Type • Date

From the **Summary** version of the **Coupon Usage** report, you can click a coupon code, coupon type or a date in the report to view the **Detail** version that make up that grouping.

The following information is included for the **Coupon Usage** report:

Column Name	Available on	Description	Hidden
Coupon Type	Summary Detail	Coupon type. This column only displays if you have selected it as your Grouping method in the input controls above.	
Coupon Code	Summary Detail	Coupon code. This column only displays if you have selected it as your Grouping method in the input controls above.	
Date	Summary Detail	Date when the coupon was applied. This column only displays if you have selected	

		it as your Grouping method in the input controls above.	
# of Usage	Summary	The coupon has been used for this number of times. Clicking the hyperlinked number opens the detailed report.	
Total Amount	Summary	The total amount of coupon usage.	
GL Account	Detail	The name of the general ledger account to which the coupon is attached.	
Activity Name	Detail	Name of the activity for which the coupon was redeemed.	
Program Name	Detail	Name of the program for which the coupon was redeemed.	
Package Name	Detail	Name of the membership package for which the coupon was redeemed.	
Usage Fee	Detail	Name of the membership usage fee for which the coupon was redeemed.	
Merchandise	Detail	The name of merchandise for which the coupon was redeemed.	
Customer	Detail	Name of the customer who used the coupon.	
System User	Detail	Name of the system user who accepted the coupon	

Credit Card Update

Use the Credit Card Update report to view updated credit card details within a specified date range.

To run the **Credit Card Update** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.
3. In the **Repository** area, click **Credit Card Update**.

Specify the following input controls when you run the **Credit Card Update** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format. The date is based on the updated date.

On the **Summary** version of the **Credit Card Update** report, click an updated date in the report to view the details.

The following information is included for the **Credit Card Update** report:

Column Name	Available on	Description	Hidden by default
Updated Date	Summary Detail	The date when credit cards information was updated.	
Number of New Expire Date	Summary	The total number of credit cards whose expiry dates have been updated on the specified date	
Number of New Cards	Summary	The total number of credit cards that have been updated on the specified date. For example, new credit card number, new credit card type, etc.	
Account Closed	Summary	Credit card account is closed	
Contact Card Holder	Summary	The account has an issue which must be resolved the card holder	
Total	Summary	Total = Number of New Expire Date + Number of New Cards	
Customer ID	Detail	Customer ID	Yes
Customer	Detail	Customer Name	

Company ID	Detail	company ID	Yes
Company	Detail	Company Name	
Updated Time	Detail	The time when the credit card was updated.	
Updated Result	Detail	It displays the update type: • New Card • New Expire Date	
Original Card Number	Detail	It displays the last four digits of the original credit card number For example: xxxx8520	
Original Card Expire Date	Detail	The original credit card expire date	
Original Card Type	Detail	It displays the original credit card type: • MasterCard • Visa	
New Card Number	Detail	It displays the last four digits of the new credit card number For example: xxxx8520	
Original Card Expire Date	Detail	The new credit card expire date	
Original Card Type	Detail	It displays the new credit card type: • MasterCard • Visa	

Credit On Account

Staff users can filter the report by the inactive since date or the specified minimum credit amount to view:

- a list of customers with positive account balances and their on account credit transaction details

- a list of customers that do not have any transactions since the specified inactive since date

- a list of customers that have at least the specified minimum balance

Note:

- Only customers with positive account credits are included in this report.

- Customers with credit on accounts but no transactions are included in this report, but with blank "Inactive Since" fields.

To run the **Credit On Account** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.

3. In the **Repository** area, click **Credit On Account**.

Specify the following input controls when you run the **Credit On Account** report:

Input Control Name	Description
Inactive Since	Select a date for the report using the calendar or enter the date in YYYY-MM-DD format to search for customers who have no transactions after this date.
Minimum Credit	Enter the required amount (a positive number) to search for customers that have at least the specified minimum credit amount. Default: 0.01

On the **Summary** version of the **Credit On Account** report, select a required customer account to view the detailed report which additionally displays each receipt number and amount.

The following information is included for the **Credit On Account** report:

Column Name	Available on	Description	Hidden by default
First Name	Summary Detail	Customer's first name	
Last Name	Summary Detail	Customer's last name	
Customer ID	Summary Detail	Customer's ID	
Company Name	Summary Detail	Company's name	
Company ID	Summary Detail	Company's ID	
Phone# 1 Home	Summary Detail	Phone number of the customer' home phone	
Phone# 2 Work	Summary Detail	Phone number of the customer' work phone	
Phone# 3 Cell	Summary Detail	Phone number of the customer' cell phone	
Email	Summary Detail	Email address of the customer	
Address 1	Summary Detail	Address 1 of the customer	
Address 2	Summary Detail	Address 2 of the customer	
City	Summary Detail	Customer's city name	
State/Province	Summary Detail	Customer's state/province	
Zip	Summary Detail	Customer's zip	
Available Credits	Summary Detail	Customer's current available credit amount	
Inactive Since	Summary	The latest transaction date Format: YYYY/MM/DD	
Receipt#	Detail	Receipt number of the customer's transaction	
Amount	Detail	Amount of the customer's transaction	

Donation Report

Use the **Donation** report to view historical donation information by donor or campaign.

To run the **Donation** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.

3. In the **Repository** area, click **Donation Report**.

Specify the following input controls when you run the **Donation** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by donation transaction date.
Revenue Site	Filter the report by the site where the donation is recorded.
Campaign Name	Filter the report by the campaign
Grouped By	Group and total the donations in this report using one of the following grouping methods: • Donor Name • Campaign Name

From the **Summary** version of the **Donation** report, you can click an amount to view **Detail** version for the donations in that grouping.

Donation Report (Summary)

Report Generated: Sep 21, 2015 10:48:17 PM

Company Name	Last Name	First Name	Donor Type	Amount
ACTIVE Net company			Company	$30.00
XYZ company			Company	$15.00
	Baldwin	Sophie	Person	$14.00
	Fisherman	Marcus	Person	$13.00
	Hills	David	Person	$7.00
	Smith	Robert	Person	$20.00
Grand Total				**$99.00**

The following information is included for the **Donation** report:

Donation Report (Details)

Report Generated: Sep 21, 2015 10:48:17 PM

Company Name	Last Name	First Name	Donor Type	Campaign Name	Receipt Date	Amount	Company ID	Customer ID	Email	Home Phone
	Smith	Robert	Person	Kids swimming pool	2015/03/03	$20.00		1602	smith.robert@active.com	(222) 913-1278
					Grand Total:	**$20.00**				

Column Name	Available on	Description	Hidden
Campaign Name	Summary	Name of the donation campaign. Displays only when the grouping method is 'Campaign Name'.	
Campaign Status	Summary	Status of the donation campaign. Displays when the grouping method is 'Campaign Name'.	
Start Date	Summary	Start date of the donation campaign. Displays when the grouping method is 'Campaign Name'.	Yes
End Date	Summary	End date of the donation campaign. Displays when the grouping method is 'Campaign Name'.	Yes
Donor Name	Summary	Customer Name or Company Name who made the donation. Display when the grouping method 'Donor Name' is selected.	
Donor Type	Summary Detail	Donor is either an individual person or a company.	
Amount	Summary Detail	If the group method is "Campaign Name", the Amount field displays the amount donated to the campaign. If the group method is 'Donor Name', the Amount field displays the amount donated by this customer/company.	
Outstanding Amount	Summary	The recurring donation amount that has not been paid by the customer/company.	
Receipt Date	Detail	The issue date for the donation receipt. Format: MM/DD/YYYY	
Receipt Number	Detail	The receipt number for the donation.	Yes
Campaign Name	Detail	The name of the campaign that the donor donated to.	
Donor Name	Detail	Customer Name or Company Name who made the donation.	
Pledged Past Due	Detail	The pledged amount as of the current date. For example, if a customer promised to pay $100 every month for the year starting on Jan 1st, and no payments were made,	

		then the pledged amount as of Mar 1st is $300.	
Company ID	Detail	Company ID of the company	
Customer ID	Detail	Customer ID of the donor	
Email	Detail	The customer/Company's email address It is blank if there is no email address specified.	
Frequency	Detail	The selected frequency of the recurring donation schedule. This column displays: • Non-Recurring for single donation campaigns • Weekly, Every other week, Twice a month, Monthly, Quarterly or Every four weeks for ongoing recurring donation campaigns • No Recurrences Pending for completed recurring campaigns	Yes
Duration Stop	Detail	The number of remaining recurring donations or the final recurring donation date. For non-recurring donations, this column displays blank.	Yes
Address line 1	Detail	The customer's residential address 1 or Company's address 1	Yes
Address line 2	Detail	The customer's residential address2 or Company's address 2	Yes
Zip/Postal Code	Detail	The customer/company's zip code	Yes
City	Detail	The customer/company's city name	Yes
State/Province	Detail	The customer/company's state/province	Yes
Home Phone	Detail	Donor	
Work Phone	Detail	Donor's work phone It displays the work phone of the customer. It displays the Phone 2 of the company It displays blank when no work phone is specified for the customer/company.	Yes
Cell Phone	Detail	The donor's cell phone.	Yes

		It displays blank if there is no cell phone specified for the customer/company. It displays the cell phone of the customer. It displays blank for a company.	
DOB	Detail	The donor's date of birth. Format: the standard date format (For example, MM/DD/YYYY) It displays blank if the donor is a company.	Yes

Gift Card

Use the **Gift Card** report to view a summary report of gift cards, and then click a specific gift card number to view a detailed report of redemptions of that gift card.

To run the **Gift Card** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public** > **ACTIVE Net** > **Financials**.
3. In the **Repository** area, click **Gift Card**.

Specify the following input controls when you run the **Gift Card** report:

Input Control Name	Description
Purchased Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by the date of purchase of the gift cards (required).
Gift Card Type Name	Filter the report by the required gift card type names (optional).
Gift Card Status	Filter the report by the required gift card statuses (Active or Expired) (optional).

In the summary version of the **Gift Card** report, you can click a **Gift Card Number** to view the **Gift Card Detail** report for that specific gift card.

The following information is included in the **Gift Card** and **Gift Card Detail** reports:

Column Name	Available in	Description	Hidden
Gift Card Type Name	Summary Detail	The gift card type name.	No
Gift Card Number	Summary Detail	The gift card number. Click to open the Detail report for this gift card.	No
Card Status	Summary	The gift card's status. 0 = New 1 = Pending 2 = Active 3 = Voided 4 = Refunded	No
Customer ID	Summary Detail	If the gift card belongs to a customer, then display the customer ID, otherwise, display the company ID.	No

Customer Name	Summary Detail	If the gift card belongs to a customer, then display the customer's [First name] [Last name], otherwise, display the company name.	No
Customer Address 1	Summary	If the gift card belongs to a customer, then display the customer's address 1, otherwise, display the company's address 1.	No
Customer Address 2	Summary	If the gift card belongs to a customer, then display the customer's address 2, otherwise, display the company's address 2.	No
Customer Email	Summary	If the gift card belongs to a customer, then display the customer's email address, otherwise, display the company's email address.	No
Amount Sold	Summary	The amount in the gift card when sold.	No
Amount Redeemed	Summary	The total amount in the gift card that has been redeemed.	No
	Detail	The amount in the gift card redeemed for a specific transaction (negative for a gift card refund).	
Amount Refilled	Summary	The total amount by which gift card has been refilled.	No
Amount Unredeemed	Summary	The total amount in the gift card that is unredeemed.	No
Last Used Date	Summary	The last date of use of the gift card (blank if not yet used).	No
Gift Card Purchased Date	Summary	The purchase date of the gift card.	No
Gift Card Expired Date	Summary	The gift card expiration date (blank if no expiration date).	No
Redeemed Date	Detail	The date on which the gift card was redeemed.	No
Redeemed Module Type	Detail	If the 'Amount Redeemed' is: • > 0, then the module type for which the gift card redemption occurred (Activity, Membership, Flexreg, Reservation, POS or Gift Card). • < 0, then 'Gift Card Refund'.	No
Redeemed Item Name	Detail	The activity name, membership package name, Flexreg program name, facility or equipment name, POS item name or gift card type name.	No

Failed Scheduled Payments

Use the **Failed Scheduled Payments** report to view scheduled payments that were either rejected or declined and contact customers if necessary.

Note that the maximum reporting date range is one year.

To run the **Failed Scheduled Payments** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.

3. In the **Repository** area, click **Failed Scheduled Payments**.

Specify the following input controls when you run the **Failed Scheduled Payments** report:

Input Control Name	Available on	Description
Start/End Date	Summary Detail	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by attempt date. Required
Revenue Site	Detail	Filter the detailed report by revenue site
Module	Detail	Filter the detailed report by module:

From the **Summary** version of the **Failed Scheduled Payments** report, you can click an amount to view failed payment details. The following information is included in the **Failed Scheduled Payments** report:

Column Name	Available on	Description	Hidden by default
Payer First Name	Summary	First name of the payer who attempted to make this payment	
Payer Last Name	Summary	Last name of the payer who attempted to make this payment	
Payer Customer ID	Summary	ID of the payer who attempted to make this payment	
Company	Summary	Name of the company which attempted to make this payment	
Company ID	Summary	ID of the company which attempted to make this payment	

Failed Schedule Payment ID	Summary	This ID is used for ACTIVE Net troubleshooting purposes.	
Last Attempt Date	Summary	Last date and time when this auto payment was attempted	
Amount	Summary	Amount of the failed payment	
Payment Type	Summary	Displays ECP or the actual credit card type	
Account#	Summary	ECP account number or the last 4 digits of the credit card number	
Card Expiration	Summary	For a credit card payment, the credit card expiry date is displayed	
Error Message	Summary	Error message for the payment failure	
No. of retries	Summary	Number of payment retries	
Corrected	Summary	"Displays Yes, No or N/A If a system user has already updated the payment information for a failed scheduled payment in the list, the payment will display Yes	
Payer Phone 1 Home	Summary	Home phone for the customer or Phone 1 for the company.	
Payer Phone 2 Work	Summary	Work phone for the customer or the Phone 2 for the company.	
Payer Phone 3 Cell	Summary	Cell phone number for the customer.	
Payer Email	Summary	Customer/company' email address	
Payer Address	Summary	Customer/company' address	
Participant First Name	Detail	First name of the participant	
Participant Last Name	Detail	Last name of the participant	
Participant ID	Detail	ID of the participant	
Participant Company Name	Detail	Company name of the participant	
Participant Company ID	Detail	Company ID of the participant	
Failed Schedule Payment ID	Detail	This ID is used for ACTIVE Net troubleshooting purposes.	
Original Receipt#	Detail	The receipt number for the original enrollment transaction	
Original Receipt Date	Detail	The receipt date when the original transaction occurred	
Allocated Charge Amount	Detail	The allocated charge amount for this failed payment. For example, if a payer paid for a facility reservation ($100) on a	

		monthly payment plan (4 payments and $25 for each payment) and during the specified date range, an automatic payment failed, then this column displays $25 for the customer.	
No. of retries	Detail	Number of payment retries	
Attempt Date	Detail	Date and time when this auto payment was attempted	
Module	Detail	The module where this transaction occurred.	
Reference ID	Detail	Module: Registration Reference ID: Activity Number Module: FlexReg Reference ID: Program ID Module: Facility Reference ID Permit Number Module: POS Reference ID: UPC Module: Membership Reference ID: Membership ID Module: Gift Card Reference ID: Gift Card number Module: Equipment Loan Reference ID: Equipment ID Module: Donation Reference ID Campaign ID Module: Other Reference ID Receipt number	
Reference Name	Detail	Module: Registration Reference Name: Activity Name Module: FlexReg Reference Name: Program name Module: Facility Reference Name Event Name Module: POS Reference Name Product Name	

		Module: Membership Reference Name: Package Name Module: Gift Card Reference Name Gift Card type Module: Equipment Loan Reference Name: Equipment Name Module: Donation Reference Name: Campaign Name Module: Other Reference Name Charge Name	
Charge Name	Detail	Name of the charge for the transaction.	
Revenue Site	Detail	The revenue site associated with the transactions	

The ACTIVE Net AUI already includes a Manage Failed Scheduled Payments page, which also lists rejected or declined scheduled payments. The differences between the AUI page and this report are as follows:

- When a payment plan comes from a balance transfer or cancellation payment, the AUI **Manage Failed Scheduled Payments** page shows the original AR transaction linked with the purchase.

- If a failed scheduled payment was to pay off multiple charges with different revenue sites, then the AUI search function lists duplicate rows with the same information but different site names. The summary report does not include a **Site** column, so only includes one row in the report output. Other than this difference, the information for each failed scheduled payment in the summary report matches the AUI search result.

Payment Plan

For better user management, staff users can use the **Payment Plan Detail** report to a list of customers who have setup payment plans during a specified date range and follow up customers if required.

Note:

- This report only includes payment plans with balances exceeding $0 and created during the specified reporting date range.
- This report only displays balances as of yesterday and cannot display balances on an arbitrary date in the past.

To run the **Payment Plan Detail** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.
3. In the **Repository** area, click **Payment Plan Detail**.

Specify the following input controls when you run the **Payment Plan Detail** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by payment plan creation date.
Module	Filter the report by module (where the payment plan was setup).
Revenue Site	Filter the report by revenue site.
Transaction Site	Filter the report by transaction site.

The following information is included in the **Payment Plan** report:

Column Name	Available on	Description	Hidden by default
Payer First Name	Summary Detail	First name of the payer associated with the payment plan	
Payer Last Name	Summary Detail	Last name of the payer associated with the payment plan	
Payer ID	Summary Detail	ID of the payer associated with the payment plan	

Company Payer Name	Summary Detail	Name of the company payer associated with the payment plan	
Company Payer ID	Summary Detail	ID of the company payer associated with the payment plan	
Payer Email	Summary Detail	Customer/company' email address	
Payer Home Phone	Summary Detail	Customer/company' home phone number	
Payer Work Phone	Summary Detail	Customer/company' work phone number	
Payer Cell Phone	Summary Detail	Customer/company' cell phone number	
Company Payer Phone 1	Summary Detail	Company payer's phone 1 number	
Company Payer Phone 2	Summary Detail	Company payer's phone 2 number	
Payment Plan ID	Summary Detail	ID of the payment plan	
Plan Created Date	Summary Detail	Date and time when the payment plan was created	
Billing Cycle	Summary Detail	Billing Cycle of the payment plan, for example: Weekly, Monthly	
Payment Type	Summary Detail	Payment type of the payment plan, for example: Not Auto Payment/Credit Card/ECP/Manual Deduction/Unknown	
Payment Plan Amount	Summary	Total amount of the payment plan	
Total Paid	Summary	Total paid amount of the payment plan	
Total Balance	Summary	Total balance for the payment plan	
Total Past Due	Summary	Past due amount for the whole payment plan as of today	
Payment Info	Detail	For a payment plan paid using a credit card, this field shows the card number with expiry date. For a payment plan paid using ECP, this field shows bank routing number and bank account number.	
Transaction Description	Detail	Transaction description	
Receipt#	Summary Detail	The receipt number of the original receipt for this payment plan	
Module	Detail	Name of the module where the payment plan was created: • Registration • Daycare	

		• Membership • POS • Facilities • Equipment Loan • Donation • Others	
Charge description	Detail	Charge description	
GL account Number	Detail	The charge's G/L account number	
GL account Name	Detail	The charge's G/L account name	
Transaction Site	Detail	Name of the site where the transaction occurred	Yes
Revenue Site	Detail	Name of the site where revenue is recorded	Yes
Installment #	Detail	The order of the installment, for example, 2 denotes the second installment among all installments	
Installment Amount	Detail	Amount setup for the installment	
Amount Paid	Detail	Amount already paid for the installment	
Balance	Detail	Current due amount for the installment	
Due on	Detail	Due date for the installment	
Past Due	Detail	As of today, the past due amount for the installment	
Participant Name	Detail	Name of the customer or company that enrolled in the activity, reserved the facility, etc.	
Participant ID	Detail	ID of the customer that enrolled in the activity, reserved the facility, etc.	
Company Participant ID	Detail	ID of the company that enrolled in the activity, reserved the facility, etc.	
Reference Name	Detail	Depending on the module to which this payment plan is linked, this column displays the: • activity name • program name • facility name • package name • equipment name • campaign name • product name • charge name (for the Other module)	

Reference ID	Detail	Depending on the module to which this payment plan is linked, this column displays the: • activity number • program number • permit number • membership ID • equipment number • Campaign ID • UPC • Blank (for the Other module)	
Category	Detail	The category of the module to which this payment plan is linked, for example, for the activity module, this column displays the activity type (this column is hidden by default).	Yes
Season	Detail	The season of the activity or FlexReg program (this column is hidden by default).	Yes
Permit Status	Detail	The status of the permit (this column is hidden by default).	Yes

Payments by payment type (CC/ECP)

Use the **Payments by Payment Type (CC/ECP)** report to view information about your organization's transactions grouped by payment type so that you can correctly reconcile your credit card, ECP, and debit payments.

To run the **Payments by Payment Type** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.

3. In the **Repository** area, click **Payments by Payment Type**.

Specify the following input controls when you run the **Payments by Payment Type** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by transaction date.
Transaction Site	Filter the report by the site where the transaction took place.
Payment Type	Filter the report by payment type.
Grouping	Group and total the transactions in this report using one of the following grouping methods: • Payment Type • Revenue Site

Payments by Payment Type (CC/ECP)

Report Generated: Feb 23,

Filters Used in Report:

Date Range: 02/09/2014 - 08/09/2014 | Revenue Site:
Transaction Site: | Payment Type: null | Group By Title:
Payment Type

Payment Type	Amount
Credit card	$151.00
Grand Totals:	**$151.00**

From the **Summary** version of the **Payments by Payment Type (CC/ECP)** report, you can click an amount in the report to view a list of transactions that make up that number.

Payments by Payment Type (CC/ECP) Detail
Report Generated: Feb 23,

Filters Used in Report:
Date Range: 02/09/2014 - 08/09/2014 | Revenue Site: | Transaction Site: | Payment Type: null | Group By Title: Payment Type | Drill Down To: N/A

Revenue Site	Transaction Site	Payment Type	Card / Account #	Payer ID	Payer Name	Approval	Authentication #	Voided Status	Amount	Operation
ActiveNet	ActiveNet	Credit card	xxx9611	958	Jane Smith	Declined ()	774	Not Voided	$78.00	
ActiveNet	ActiveNet	Credit card	xxx0292	413	John Smith	Declined ()	953	Not Voided	$73.00	
								Sub-Total:	$151.00	
								Grand-Total:	$151.00	

The following information is included in the **Payments by Payment Type (CC/ECP)** report:

Column Name	Available on	Description	Hidden by default
Payment Type	Summary	The type of payment used for this group of transactions.	
Amount	Summary	The total transaction amount associated with this payment type.	
Transaction Site	Detail	The site where the transaction occurred.	
Receipt #	Detail	The receipt number for the payment	Yes
Payment Type	Detail	The type of payment used in this transaction.	
Card / Account #	Detail	The final four digits of the credit card number or bank account number used in this transaction.	
Payer ID	Detail	The ID number of the customer associated with this transaction.	
Payer Name	Detail	The name of the customer associated with this transaction.	
System User	Detail	Names of system user associated with the receipt	Yes
Approval	Detail	The status returned by the payment processor for this transaction.	
Authentication #	Detail	The reference number returned by the payment processor for this transaction.	
Voided Status	Detail	Indicates whether this transaction was voided or not voided.	
Amount	Detail	The amount of this transaction.	
Receipt Date	Detail	The date on which the receipt was generated	
Operation	Detail	The type of operation that occurred for this transaction. For example: "Authorize" or "Sale".	

Refund

Use the **Refund** report to view information about refunds so that you can identify refunding trends such as common refund reasons and staff members who perform frequent refunds.

To run the **Refund** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.
3. In the **Repository** area, click **Refund Report**.

Specify the following input controls when you run the **Refund** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by receipt date.
Transaction Site	Filter the report by the site where refunds are processed.
Workstation	Filter the report by refunds processed at specific workstations.
Refund Payment Type	Filter the report by refunds performed using specific payment types.
Grouping	Group and total the transactions in this report using one of the following grouping methods: • Customer Name • Date • Refund Payment Type • System User

From the **Summary** version of the **Refund** report, you can click a date, customer name, refund payment type, or system user in the report to view a list of transactions that make up that grouping.

The following information is included for the **Refund** report:

Column Name	Available on	Description	Hidden by default
Transaction Site	Summary Detail	The site associated with these transactions. This column only displays if you have selected it as your Grouping method in the input controls above.	

Refund Payment Type	Summary Detail	The payment type by which the refund was made. This column only displays if you have selected it as your Grouping method in the input controls above.	
Date	Summary	The date when the refund receipt was processed. This column only displays if you have selected it as your Grouping method in the input controls above.	
Customer Name	Summary	The name of the customer or company that received the refund. This column only displays if you have selected it as your Grouping method in the input controls above.	
System User	Summary	The name of the system user who processed the refund. This column only displays if you have selected it as your Grouping method in the input controls above.	
Amount paid	Summary Detail	The refund amount paid. The sum of the amount paid by each refund payment type should equal the Net Refund Paid.	
Refund Fee	Detail	The assessed refund fee, if any.	
Receipt Date	Detail	The date when the refund receipt was processed.	
Receipt Time	Detail	The time when the refund receipt was processed.	
Customer ID	Detail	The customer's ID number in ACTIVE Net.	
Receipt Number	Detail	The receipt number of the refund.	
Customer Name	Detail	The name of the customer or company that received the refund.	
Reason	Detail	The first 200 characters entered in the refund notes field.	
Staff Notes	Detail	The first 200 characters of staff notes entered for the refund transaction.	
System User	Detail	The name of the system user who processed the refund.	
Module	Detail	The module in which the refund transaction occurred (includes Registration, FlexReg, Facility, POS, Membership, Gift Card, Equipment Loan, Donation and Other modules).	

Category	Detail	Activity category name, membership package category name, FlexReg category name or blank.	
Activity Name	Detail	The activity name of the refunded activity	
Activity Number	Detail	The activity number of the refunded activity	
Activity Season	Detail	The season of the refunded activity.	
FlexReg Program Name	Detail	The program name of the refunded FlexReg Program	
FlexReg Program Number	Detail	The program number of the refunded FlexReg Program.	
FlexReg Season	Detail	The season of the refunded FlexReg Program.	
Membership ID	Detail	The customer's membership ID of the refunded membership.	
Primary Customer ID	Detail	The customer ID of the primary member for the refunded membership.	
Package Name	Detail	Name of the membership package that was refunded.	
POS Product Name	Detail	The name of the refunded POS product.	
Permit Number	Detail	Permit number of the reservation that was refunded.	
GL Account Number	Detail	Number of the GL account associated with the refund transaction.	
GL Account Name	Detail	Name of the GL account associated with the refund transaction.	
Customer Address	Detail	Customer Address	Yes
City	Detail	City	Yes
State	Detail	State	Yes
Postal Code	Detail	Postal Code	Yes

Scholarship

Use the **Scholarship** report to view a list of scholarships (individual and family scholarships are supported) and their usage and remaining amounts.

To run the **Scholarship** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Financials**.
3. In the **Repository** area, click **Scholarship**.

Specify the following input controls when you run the **Scholarship** report:

Input Control Name	Description
Date Option	Select either Scholarship Grant Date, Scholarship Expiry Date or Flex Reg Program Start Date to filter scholarships.
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format.
Revenue Site	Filter the report by revenue site.
Age Categories	Select the required age categories by which to filter customers.
Donor	Filter the report by donor name (Mandatory).
Scholarship Name	Filter the report by scholarship name.

Scholarship Name	Opening Balance	Remaining Balance	Total Awarded	Awarded Amount Used	Remaining Awarded Amount to be Used	# of Unique Families Awarded	# of Unique Customers Awarded
2015 scholarship	$10,000.00	$9,000.00	$1,000.00	($50.00)	$950.00	0	5
2016 scholarship	Unlimited	Unlimited	$900.00	$0.00	$900.00	0	10

On the Summary version of the Scholarship report, click a scholarship name in the report to view the details.

Scholarship (Details)
Report Generated: Oct 13, 2016 7:23:42 AM

Type	Scholarship Name	Family ID Family	Customer ID Last Name	First Name	Email	Home #	Grant Date	Expiry Date	Award Amount	Amount Used	Award Balance System User
Family	2016 scholarship	3227Green	3891 Green	Mary			2016/09/26		$1,000.00	($70.00)	$930.00 ActiveNet Admin
Family	2016 scholarship	3227Green	3892 Green	David					$0.00	$0.00	$0.00

The following information is included for the **Scholarship** report:

Column Name	Available on	Description	Hidden by default
Scholarship Name	Summary Detail	The name of the Scholarship.	

Opening Balance	Summary	The amount donated to the organization. If the opening balance for the scholarship is unlimited, it displays "Unlimited".	
Remaining Balance	Summary	Remaining Balance = Opening Balance – Total Awarded If the opening balance for the scholarship is unlimited, it displays "Unlimited". If the Total Awarded amount is unspecified, it displays "- -"	
Total Awarded	Summary	Total scholarship amount awarded to customers. If the award type is "Unspecified", it displays "Unspecified".	
Awarded amount used	Summary	Total amount of awarded scholarships that has been used.	
Remaining awarded amount to be used	Summary	If Total Awarded is a specific number, Remaining awarded amount to be used = Total awarded – Awarded amount used If the Total Awarded amount is unspecified and the Opening Balance is a specific number, Remaining awarded amount to be used = scholarship opening balance – total specified awarded amount – total Used of the Unspecified award" If Total Awarded is unspecified and Opening Balance is unlimited, it displays "Unlimited".	
# of Unique Families Awarded	Summary	For family-type scholarships, this column displays the number of unique families that have been awarded the specified scholarship.	
# of unique customers awarded	Summary	The number of customers who were awarded with that scholarship.	
Type	Detail	Scholarship type. It displays 'Family' or 'Individual'.	
Family ID	Detail	Family ID	
Family	Detail	Family Name	
Last Name	Detail	Customer Last Name	
First Name	Detail	Customer First Name	

Date of Birth	Detail	Customer birthdate	Yes
Age Category	Detail	The customer's age category	
Customer ID	Detail	Customer ID	
Customer Name	Detail	Name of customer who received the scholarship If Total Awarded is unspecified, it displays "- -"	
Address	Detail	Customer's residential address	
Email	Detail	Customer's email address	
Home #	Detail	Home # of customers.	
Other Phone Numbers	Detail	For example, work phone, cell phone, other phone numbers.	
Grant Date	Detail	Date that the scholarship was awarded to the customer	
Expiry Date	Detail	Expiry date for the scholarship	
Award Amount	Detail	Amount that was awarded to the customer. If the Award Type is "Unspecified", it displays "Unspecified".	
Amount Used	Detail	Amount of scholarship that used by the customer.	
Award Balance	Detail	Amount of the balance that can be used by the customer. If Total Awarded is a specific number Award Balance = Total awarded – Awarded amount used If Total Awarded is unspecified and Opening Balance is a specific number, Award Balance = scholarship opening balance – the total specified awarded amount – total Used of the Unspecified award" If the Total Awarded is unspecified and the Opening Balance is unlimited, it displays "Unlimited".	
System User	Detail	The system user who assigned the scholarship to the customer	
Address line 1	Detail	First line of registrant's mailing address	Yes
Address line 2	Detail	Second line of registrant's mailing address	Yes

City	Detail	City of customer's mailing address	Yes
State/Province	Detail	State of the customer's mailing address	Yes
Zip/Postal Code	Detail	Zip code of the customer's mailing address	Yes
Work #	Detail	Work phone number	Yes
Other #	Detail	Other phone number	Yes
Active Membership	Detail	Whether the customer is an active member at the time of running the report (for members in retention eligible or non-retention eligible membership packages, YES is displayed)	Yes
Head of Household Last Name	Detail	Head of Household Last Name	Yes
Head of Household First Name	Detail	Head of Household First Name	Yes
Head of Household Email	Detail	Head of Household Email Address	Yes
Program Start Date	Detail	The earliest session date of the Flex Reg program	Yes
Gender	Detail	Customer gender	Yes
Age	Detail	Customer age	Yes

Flex Reg

Flex Reg Check In

Use the **Flex Reg Check In** report to checked-in and checked-out totals, for example, view checked-in and checked-out kid totals for ACTIVE Net Connect programs.

To run the **Flex Reg Check In** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Flex Reg**.

3. In the **Repository** area, click **Flex Reg Check In**.

Specify the following input controls when you run the **Flex Reg Check In**:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by session date.
Site	Filter the report by selecting one or more site.
Program	Filter the report by Flex Reg program.
Session	Filter the report by program session.
Grouping	Group and total the checked-in and checked-out totals in this report using one of the following grouping methods: • Date • Site • Program

From the **Summary** version of the **Flex Reg** report, you can click a date, site name, or system user in the report to view a list of kids that make up that grouping.

Flex Reg Check In (Details)
Report Generated: May 31, 2017 7:13:35 AM

Site	Check In Date	Program	Session	First Name	Last Name	Customer ID	Check In Time	Check Out Date	Check Out Time	Check In System User	Check Out System User	Pick up Person
Site A01	2017-04-24	Afterschool program	April	Mary	Green	5322	07:00:00	2017-04-24	17:00:00	Admin 02	Admin 03	David, Green
			2017-04-24 Total Checked In:	1	Total Checked Out:	1						

Column Name	Available on	Description	Hidden

Site	Summary Detail	The site which kids were checked in to or checked out from. transactions	
Check In Date	Summary Detail	The date when customers checked in	
Program	Summary Detail	The Flex Reg program that customers checked in to.	
Session	Summary	Name of the session under the program	
Nbr of Checked In Kids	Summary	Total number of kids who checked in to the program session	
Nbr of Checked Out in Kids	Summary	Total number of checked-out who checked out from the program session	
First Name	Summary	Customer first name	
Last Name	Summary	Customer last name	
Customer ID	Summary	Customer ID	
Check In Time	Summary	The time when customers checked in	
Check Out Date	Summary	The date when customers checked out	
Check Out Time	Summary	The time when customers checked out.	
Check In System User	Summary	Name of the system user who check-in the kid	
Check Out System User	Summary	Name of the system user who check-out the kid	
Pick up person	Summary	Name of the pick up person	

Program Authorized Pick-ups

Use the **Program Authorized Pick-ups** report to view authorized pick-up persons for enrollees who attend a FlexReg program during a specified date range.

To run the **Program Authorized Pick-ups** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Flex Reg**.

3. In the **Repository** area, click **Program Authorized Pick-ups**.

Specify the following input controls when you run the **Program Authorized Pick-ups** report:

Input Control Name	Description
Attendance Date Range	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to retrieve enrollees who attend a FlexReg program during the specified date range.
Site	Filter the report by program site.
Program	Filter the report by the program name. Note: The list of programs is based on the program site.
Session	Filter the report by program session.

The following information is included in the report:

Column Name	Description	Hidden?
Program Number	Program number	
Program Name	Program name	
Enrollee ID	Customer ID of the enrollee	
Enrollee First Name	First name of the enrollee	
Enrollee Last Name	Last name of the enrollee	
Enrollee Gender	Gender of the enrollee	
Enrollee DOB	Birthdate of the enrollee	
Enrollee Home Phone	Home phone number of the enrollee	
Authorized Pickup Person ID	Customer ID of the authorized pickup person	
Authorized Pickup Person Relation	Relation between the enrollee and the authorized pickup person	

Authorized Pickup Person First Name	First name of the authorized pickup person	
Authorized Pickup Person Last Name	Last Name of the authorized pickup person	
Authorized Pickup Person Home Phone	Home phone of the authorized pickup person	
1st Emergency Contact First Name	First Name of the 1st Emergency Contact	
1st Emergency Contact Last Name	Last name of the 1st Emergency Contact	
1st Emergency Contact Home Phone	Home phone of the 1st Emergency Contact	
1st Emergency Contact Other Phone	Other phone number of the 1st Emergency Contact	
2nd Emergency Contact First Name	First name of the 2nd Emergency Contact	
2nd Emergency Contact Last Name	Last name of the 2nd Emergency Contact	
2nd Emergency Contact Home Phone	Home phone number of the 2nd Emergency Contact	
2nd Emergency Contact Other Phone	Other phone number of the 2nd Emergency Contact	

Program Revenue and Enrollment Breakdown

Use the **Program Revenue and Enrollment Breakdown** report to view the breakdown of FlexReg program revenue and registrants by charge type, for example, sale, discount, refund charge and scholarship.

To run the **Program Revenue and Enrollment Breakdown** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Flex Reg**.

3. In the **Repository** area, click **Program Revenue and Enrollment Breakdown**.

Specify the following input controls when you run the **Program Revenue and Enrollment Breakdown** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by transaction date.
Program Site	Filter the report by program site.
Program Status	Select the program status to filter the report. • Open • Close • Tentative • On Hold • Retired
Program Type	Filter the report by program type.
Program	Filter the report by the program name. Note: The list of programs is based on the program site, program status and program type selection.

Course Revenue and Enrollment Breakdown (Summary)
Report Generated: Dec 21, 2015 10:22 PM

Program Name	Catalog Number	Course Fee Amount	# Reg	Additional Fee(s) Amount	# Reg	Refund Fee Amount	# Reg	Discounts Amount	# Reg	Scholarships Amount	# Reg	Refunds Amount	# Reg	Revenue
2015-16 Afterschool Child Care	51365	$18,205.00	6	$0.00	0	$0.00	0	$0.00	6	$0.00	0	$0.00	0	$18,205.00
2015-16 Single Day Child Care	51378	$8,725.00	5	$0.00	0	$0.00	0	($283.50)	4	($429.00)	1	$0.00	0	$8,012.50
Grand Totals:		$26,930.00	11	$0.00	0	$0.00	0	($283.50)	10	($429.00)	1	$0.00	0	$26,217.50

The **Program Revenue and Enrollment Breakdown** report only includes **Detail** version. The following information is included in the Detail version:

Column Name	Description

Program Name	The name of the FlexReg program
Catalog Number	The number of the FlexReg program If the program number is null, it is blank.
Course Fee	**$ Amount** The total registration fees received for the program during the specified reporting date range. • = Regular enrollment fees(before discount) + Taxes • Include both paid and unpaid amounts
	# Reg The total number of participants who were charged with the course fees during the specified reporting date range.
Additional Fee	**$ Amount** The total additional fee applied to the program registrants during the specified reporting date range. • It equals to Applied additional charge • Include both paid and unpaid amounts
	# Reg The total number of participants who were charged with the additional fees during the specified reporting date range.
Refund Fee	**$ Amount** The total refund fee applied to program registrants during the specified reporting date range. It equals to Applied refund charge
	# Reg The total number of participants who were charged with the refund fee during the specified reporting date range.
Discounts	**$ Amount** The discount amount applied to program registrants during the specified reporting date range. • = Applied discount amount – Refunded discount amount • Include: coupon and normal discount
	# Reg The total number of participants who applied discounts during the specified reporting date range.
Scholarships	**$ Amount** The scholarship amount applied to program registrants during the specified reporting date range. • = applied scholarship amount – refunded scholarship amount • Include both the "treat as payment" and "treat as discount" scholarships.
	# Reg The total number of participants who applied scholarships during the specified reporting date range.

Refunds	**$ Amount** The total refunded amount of programs during the specified reporting date range.
	# Reg The total number of participants who received refunds during the specified report date range.
Revenue	Revenue = Sales + Additional Fee(s) + Refund Fee – Discounts – Scholarships – Refunds • The revenue includes taxes. • The revenue includes the absorbed tran/conv fees. • The revenue does not include the non-absorbed tran/conv fees.

Program Sales

Use the **Program Sales** report to view the revenue and enrollment counts for a FlexReg program to monitor the performance of each FlexReg/Daycare program across facilities. Also use the **Program Sales** report to view the demographics for all enrollees in a particular program.

To run the **Program Sales** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Flex Reg**.
3. In the **Repository** area, click **Program Sales**.

Specify the following input controls when you run the **Program Sales** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by receipt date.
Reservation Unit	Filter the report by reservation unit. Note: The Weekly reservation calculation is based on the first day (Monday) of each week, and the Monthly reservation unit calculation is based on the first day of each month.
Site	Filter the report by program site. Program site is the site that assigned with the daycare program.
Program Type	Filter the report by program type.
Program	Filter the report by program name.
Session	Filter the report by session name.

On the **Summary** version of the **Program Sales** report, click a program name in the report to view a list of transactions for that program. The following information is included for the **Program Sales** report.

Column Name	Available on	Description	Hidden by default
Program Name	Summary	Name of the FlexReg program.	
Program Number	Summary Detail	Number of the FlexReg program.	
Status	Summary Detail	Status of the program	Yes
Daycare Category	Summary	Daycare category of the program	Yes

	Detail		
Daycare Other Category	Summary Detail	Daycare other category of the program.	Yes
Supervisor	Summary Detail	Name of the program supervisor	Yes
Department	Summary Detail	Department name of the program	Yes
#Res	Summary	Number of residents who enrolled into the program	Yes
#NonRes	Summary	Number of non-residents who enrolled into the program	Yes
#Enrolled (Unique)	Summary	The total number of unique customers who were enrolled in the daycare program within the specified report date range.	
#Enrolled (Duplicated)	Summary Detail	The total number of customers (includes duplicates) who were enrolled in the daycare program within the specified report date range.	
#Waiting list	Summary Detail	The total number of customers who were added to the waiting list within the specified date range.	
#Withdrawal	Summary Detail	The total number of customers who withdrew from the daycare program within the specified report date range.	
Gross Sales	Summary	The total registration fee received for the program enrollment during the specified report date range.	
Discounts	Summary	The amount of discounts applied to the daycare program during the specified report date range.	
Scholarships	Summary	The amount of scholarship applied to the daycare program during the specified report date range.	
Refunds	Summary	The total refunded amount for the daycare program during the specified report date range.	
Total Income	Summary	= Gross Sales - Discounts – scholarships - Refunds	
Session	Detail	Session(s) attached to the program.	
Reservation Date	Detail	Date of the reservation	

Scheduled Flex Reg Payments

Use the new **Scheduled Flex Reg Payments** report to view the expected count and total value on each Flex Reg payment due date of:

- Manual Flex Reg payments.
- Automated credit card Flex Reg payments.
- Automated Electronic Fund Transfer (EFT) Flex Reg payments.

To run the **Scheduled Flex Reg Payments** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Flex Reg**.

3. In the **Repository** area, click **Scheduled Flex Reg Payments**.

Specify the following input controls to run the **Scheduled Flex Reg Payments** report:

Input Control Name	Description	
Scheduled Due Start Date	Start of the date range of scheduled Flex Reg payment due dates.	
Scheduled Due End Date	End of the date range of scheduled Flex Reg payment due dates.	
Program Info	No Program Information	View expected manual and automated Flex Reg payment counts and total amounts without the corresponding Flex Reg program ID, name and catalog number.
	With Program Information	View expected manual and automated Flex Reg payment counts and total amounts with the corresponding Flex Reg program ID, name and catalog number.

The following information is included in the **Scheduled Flex Reg Payments** report:

Column Name	Description	Hidden by default
Program ID	FlexReg program ID (included only if **Program Info** = **With Program Information**).	No
Program Name	FlexReg program Name (included only if **Program Info** = **With Program Information**).	No
Program Catalog Number	FlexReg program Catalog Number (included only if **Program Info** = **With Program Information**).	No
Due Date	Date on which the scheduled Flex Reg payment is due.	No
No Auto Pay Count	Expected count of manual Flex Reg payments on the due date.	No
No Auto Pay Amount	Expected total value of manual Flex Reg payments on the due date.	No

CC Auto Pay Count	Expected count of automated credit card Flex Reg payments on the due date.	No
CC Auto Pay Amount	Expected total value of automated credit card Flex Reg payments on the due date.	No
EFT Auto Pay Count	Expected count of automated Electronic Fund Transfer (EFT) Flex Reg payments on the due date.	No
EFT Auto Pay Amount	Expected total value of automated Electronic Fund Transfer (EFT) Flex Reg payments on the due date.	No

Memberships

Membership Audit

For auditing purposes, use the **Membership Audit** report to view the log history for membership enrollments and updates, which includes member, membership, membership package and transaction information.

Note that the maximum reporting date range is 30 days.

To run the **Membership Audit** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Memberships**.

3. In the **Repository** area, click **Membership Audit**.

Specify the following input controls when you run the **Membership Audit** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by membership usage date. Required
Membership Transaction Type	Filter this report by membership transaction type: • None • Join • Transfer • Renew • Renew After Grace • Refund And Cancel • Refund • Fee Adjust • Modify • Pass Refund • Status Change • Becomes Effective • Becomes Suspended • Becomes Unsuspended
Membership Status	Filter this report by membership status: • Pending • Active • Voided • Refunded

	• Renewing Temporary status: memberships being renewed. • Deferred Commit Temporary status: memberships where changes are being committed.
Package Site	Filter this report by sites to which the memberships belong
Package Category	Filter this report by membership category
Package	Filter this report by specific membership package

The **Membership Usages** report only includes **Detail** version. The following information is included in the **Detail** version:

Column Name	Description	Hidden by default
Member Since Date	Date when this member first joined this membership	
Primary Member Customer ID	Customer ID of the Primary Member	
Primary Member First Name	First Name of the Primary Member	
Primary Member Last Name	Last Name of the Primary Member	
Date Effective	Date the membership becomes effective	
Date Expires	Expiry date of the membership	
Date Suspended From	Date when this membership was suspended	
Date Suspended To	Date when this membership's suspension ended	
Membership Autorenewal Type	The payment method selected for the membership auto-renew type	
Membership ID	Membership ID	
Membership Status	Membership Status. Including: Pending, Active, Voided, Refunded, Renewing, Deferred Commit	
Package ID	The package ID of the membership	
Package Max Uses	If this is a punch card membership, then the maximum number of uses for this membership (not the remaining uses) is displayed.	
Package Name	The package name of the membership	

Package Category ID	Package category ID	
Package Category Name	Package category name	
Package Site ID	The site ID of the site to which this package belongs	
Package Site Name	The name of the site to which this package belongs	
Retention Eligible Package	Whether this package is a Retention Eligible Package	
Suspended Reason	Reason that the membership was suspended	
Beg_Datestamp	The date and time when this membership was changed to this status either by a transaction or a manual change by membership inquiry	
End_Datestamp	The date and time when this membership was ended this status either by a transaction or a manual change by membership inquiry	
Membership Transaction Type	Transaction type for the origin or cause of the membership change	
Membership History ID	ID for database-level of trouble shooting	
System User First Name	The system user first name.	
System User Last Name	The system user last name.	
Transaction ID	Transaction ID for the membership change.	
Voided	Whether the transaction has been voided	
Workstation Name	Workstation where this membership change was made	

Membership Package Configuration

The **Membership Package Configuration** report provides staff users with detailed configuration information so that they can easily manage multiple membership packages. The report result page lists all matching membership packages and their configurations.

To run the **Facility Configuration** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Memberships**.

3. In the **Repository** area, click **Membership Package Configuration**.

Specify the following activity configuration properties to filter workstations:

- Package Site

- Package Category

- Package Status

- Package

This report only includes the detail version. The following information is included in the detail version. To view description of each field, please refer here.

Column Name	Hidden
Package Name	
Minimum Age	
Maximum Age	
Age Range	
Gender	
Primary Fee	
Description	
Status	
Retention Eligible	
Category	
Site	
Site Phone Number	
Site Address1	
Site Address2	
Site City	

Site State	
Site Zip Code	
Geographic Area	

Membership Package Charge Configuration

The **Membership Package Charge Configuration** report provides staff users with an overview of membership package charge configurations so that they can easily manage multiple membership packages. The report output lists all matching membership packages and their configurations.

To run the **Membership Package Charge Configuration** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, open **Public** > **ACTIVE Net** > **Memberships**.
3. In the **Repository** area, click **Membership Package Charge Configuration**.

Specify the following membership package properties by which to filter the report output:

- Package Site (optional, multiple selection)
- Package Category (optional, multiple selection)
- Package Status (optional, multiple selection from Open, Closed and Not specified).
- Package (optional, multiple selection).

The following information is included in the report output:

Column Name	Description	Hidden
Package ID	The ID of a package	
Package Name	Name of the package	
Site	Configured package site	
Primary Charge Name	Show the primary charge name.	
Package Charge Name	Name of the charge for the package (lowest level)	
Package Charge Type	0 = Fee 1 = Discount If not 0/1, show the option name, 'Scholarship'.	
Allow Override	0 = Always 1 = Never 2 = By Password	
Fee Order	Configured order number	
Customer Type	Show the configured customer type	
Description	Configured description, max 200 chars (can be BLANK)	
Primary Fee	Checked = Yes Unchecked = No	
Allow pro-rate during refunds	Yes/No	
Allow pro-rate during refunds as of date	Date	Yes
Allow pro-rate during enrollments or sales	Yes/No	

Allow pro-rate during enrollments or sales as of date	Date	Yes
GL Account Name	The configured GL account. No matter what the 'Charge Type' is, the charge's GL account name is shown in this column	
GL Account Number	The configured GL account. No matter what the 'Charge Type' is, the charge's GL account number is shown in this column	
Charge Amount	If the 'Charge Type' is 'Fee', then the configured Charge Amount	
Per Use Fee	Checked = Yes / Unchecked = No	Yes
Per Pass Fee	Checked = Yes / Unchecked = No	Yes
Discountable	Checked = Yes / Unchecked = No	Yes
Exclude from Payment Plans	Checked = Yes / Unchecked = No	Yes
Only apply to renewal	Checked = Yes / Unchecked = No.	Yes
Discount Order	Configured order number	
Discount Type	If Package Charge Type = Discount, then the column shows: 0 = Fixed Discount 1 = Percentage Discount	
Discount Percent	If Package Charge Type = Discount and Discount Type = Percentage Discount, then the percent discount with '%'. If not, then BLANK	
Fixed Amount	If Package Charge Type = Discount and Discount Type = Fixed Discount amount, then the fixed amount. If not, then BLANK	
Number of time periods to apply to purchases	Discount/scholarship all have this one. Show the Number	
Type of Scholarship	If Package Charge Type = Scholarship, then the column will show the content: 0 = Fixed Discount 1 = Percentage Discount	
Scholarship Percentage	If Package Charge Type = Scholarship, Type of Scholarship = Percentage Discount, show the percent number with '%' If not, then BLANK	
Scholarship Default Amount	If Package Charge Type = Scholarship and Type of Scholarship = Fixed Discount, then the fixed amount If not, then BLANK	
Taxable by tax 1	Checked = Yes / Unchecked = No	Yes
Taxable by tax 2	Checked = Yes / Unchecked = No	Yes
Taxable by tax 3	Checked = Yes / Unchecked = No	Yes
Taxable by tax 4	Checked = Yes / Unchecked = No	Yes
Taxable by tax 5	Checked = Yes / Unchecked = No	Yes
Taxable by tax 6	Checked = Yes / Unchecked = No	Yes
Taxable by tax 7	Checked = Yes / Unchecked = No	Yes
Taxable by tax 8	Checked = Yes / Unchecked = No	Yes
Prefill Condition Override	0 = Never	Yes

	1 = Always 2 = Resident 3 = Non-resident 4 = Minor 5 = Senior 6 = Internet 7 = Member 8 = Non-member	
Minimum Age	The minimum age.	
Maximum Age	The maximum age.	
Minimum Passes to Qualify	The number of Minimum Passes to Qualify.	
Maximum Passes to Qualify	The number of Maximum Passes to Qualify.	
Minimum Uses to Qualify	The number of Minimum Uses to Qualify.	
Maximum Uses to Qualify	The number of Maximum Uses to Qualify.	
Activation Date	Configured Activation Date (format: YYYY/MM/DD)	
Expiration Date	Configured Expiration Date (format: YYYY/MM/DD)	

Membership Statistics

Note:

- For the differences between these two reports, refer to the table below:

Membership Statistics -YMCA	Membership Statistics – Parks & Recreation
Retention eligible memberships	Non-retention eligible memberships
Punch passes are not included	Punch passes are included
Recaptured column	No
Reinstated column	No

- To see terminations drill, schedule the membership statistics report.

- Only active and suspended members will be displayed.

- Based on the **ACTIVE Net AUI** > **Administration Home** > **Membership Settings** > **Configuration** page > **Allow Renewal up to X days past expiration** setting, depending on the day on which the report is run, the Membership Statistics report may display different counts in the **Total Members entering since** column.

  For example, for an **Allow Renewal up to 10 days past expiration** setting, if a member's membership expired on April 1, 2019 and was renewed on April 8, 2019, then the effective date of the renewed membership is April 2, 2019. If the report is run on:

  - April 5, 2019, then the report excludes the renewed member.
  - April 12, 2019, then the report includes the renewed member.

Use the **Membership Statistics** report to view and understand changes in your organization's memberships over specific periods of time. You can also use the **Membership Statistics** report to track key performance indicators and then identify specific members or ex-members so that you can reach out to them as appropriate.

The **Membership Statistics** report totals up the number of joins, retained members, members transferred in/out, net branch transfers, retained members, and terminations.

To run the **Membership Statistics** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Memberships**.

3. In the **Repository** area, click **Membership Statistics**.

Specify the following input controls when you run the **Membership Statistics**:

Input Control Name	Description
Site	Filter the report by selecting one site.
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by membership effective date.
Package Category	Filter the report by package category.
Package Status	Filter the report by package status.
Package –	Filter the report by package. The packages that display depend on the **Package Category** that you have selected above.

Note: If you run the **Membership Statistics** report with very broad filters, then it may take a long time for the report output to appear on the screen. The length of time it takes to generate the report depends on the total number of records included in the report. For example, if you are running the **Membership Statistics** report with broad filters that will include more than 10,000 records in the output, then the report will take over 2 minutes to generate.

If it is taking too long to run the **Membership Statistics** report, try narrowing the filters that you are using in the **Input Controls** window.

Membership Statistics - Summary Report
Report Generated: May 31, 2016 11:09:26 PM

	Total Members entering 04/30/2016	Joins	Reinstated	Transferred In (Package)	Transferred Out (Package)	Net Transferred (Package)	Transferred In (Branch)	Transferred Out (Branch)	Net Transferred (Branch)	Retained	Terminations	Total Members on 05/30/2016	Change % 04/30/2016 to 05/30/2016	Suspended
Site Name: Not specified														
Package Category: Individual Retention Eligible														
Retention Monthly Pass all site1	2	0	0	0	0	0	0	0	0	0	0	2	0.00%	0
Package Category Totals:	2	0	0	0	0	0	0	0	0	0	0	2	0.00%	0

Column Name	Description	Included in which report
Site	The membership location associated with each package.	Both
Package Category	The package category associated with each package.	Both
Package Name	The name of the membership package.	Both
Total Members entering <Start Date>	Total number of active members on the **Start Date** that you specified in the report's **Input Controls** window.	Both
Joins	Number of new members during the report's date range.	Both
Reinstated	Total number of members who meet both of the following conditions:	Membership Statistics – YMCA

	· Own memberships which have expired or been cancelled on or before the reporting start date. · Have renewed memberships within the reporting date range	
Transferred In (Package)	The number of members who have transferred into another package.	Both
Transferred Out (Package)	The number of members who have transferred out to another package.	Both
Transferred In (Branch)	The number of members who have transferred in from another site. This could be a transfer into the same package or a different package.	Both
Transferred Out (Branch)	The number of members who have transferred out to another site. This could be a transfer into the same package or a different package.	Both
Terminations	The number of members who terminated their memberships during the report date range.	Both
Total Members on End Date	This number is calculated using the following formula: Total Members on Start Date + Joins + Reinstated + Package Transfers In – Package Transfers Out + Branch Transfers In – Branch Transfers Out – Retained – Terminations	Both
Change %	This number is calculated using the following formula: % [(Total Members on Start Date – Total Members on End Date) / Total Members on End Date]	Both
Suspended	The count of members in a suspended state within the date range of the report. This count includes members who were suspended within the report date range, and members who were suspended throughout the report date range. Note: Only active and suspended members will be displayed.	Both

When you run the **Membership Statistics** report, the **Summary** version appears first. The following information is included in the summary version of the **Membership Statistics** report:

Membership Statistics - Terminated Memberships
Report Generated: Feb 23, 2015 8:46

Filters Used in Report:
Date Range: 08/01/2014 - 08/31/2014 | Site: YMCA | Package Categories: Family | Packages: /Family

	Home Phone	Email	Address	City	State / Zip/Postal Prov Code	Member Since	Package Name	Termination Date	Termination Reason	Withdrawal Reason
Smith, Jane	(555) 555-5555	test@test.com	123 Main St	Springfield	BC 12345	08/29/2013	/Family	08/28/2014	Expired	

From the **Summary** version of the **Membership Statistics** report, you can click any number in the report to view a list of members who make up that count. This view of the **Membership Statistics** report displays each member's ID, name and contact information, along with their package name, term, branch date, and join date.

Membership Statistics (detail) – Total Members entering {start date}/ Join

Displays a list of members who make up the displayed count.

Column Name	Description	Hidden by default
Customer ID	The member's customer ID	
Membership ID	The membership ID of the membership	
Pass Number	Member's pass number	Hide
Last Name	Last Name of the member	
First Name	First name of the member	
Home Phone	Member's home phone #	
Email	Member's email address	
Address 1	Member's mailing address	Hide
Address 2	Member's mailing address	Hide
City	Member's city	Hide
State/Province	Member's State/Province	Hide
Zip/Postal Code	Member's Zip/Postal Code	Hide
DOB	Member's date of birth	Hide
Age	Member's age.	Hide
Gender	Member's gender	Hide
Package Category	Category of the package	
Package Name	Name of the package	

Package Term	The package term (e.g. Monthly)	
Branch Name	Branch name of the membership	
Join Date	Date when the member joined	Displays only for the "Joins" drill down.
Payment Type	Payment type used when the member joined	Hide. Displays only for the "Joins" drill down.

Membership Statistics (detail) – Reinstated

Displays a list of members who make up the displayed count.

Column Name	Description	Hidden by default
Customer ID	The member's customer ID	
Membership ID	The membership ID of the membership	
Pass Number	Member's pass number	Hide
Last Name	Last Name of the member	
First Name	First name of the member	
Home Phone	Member's home phone #	
Email	Member's email address	
Address 1	Member's mailing address	Hide
Address 2	Member's mailing address	Hide
City	Member's city	Hide
State/Province	Member's State/Province	Hide
Zip/Postal Code	Member's Zip/Postal Code	Hide
DOB	Member's date of birth	Hide
Age	Member's age.	Hide
Gender	Member's gender	Hide
Termination Date	Date when the membership was terminated	
Renewal Date	Date when the membership was renewed	
Package Category	Category of the membership	
Package Name	Name of the renewed package	
Branch Name	Name of the branch	

Membership Statistics (detail) – Transfers In (Package), Transfers Out (Package)

Displays a list of members who make up the displayed count.

Column Name	Description	Hidden by default
Membership ID	The membership ID of the membership.	
Pass Number	Member's pass number	Hide
Customer ID	The member's customer ID	
Last Name	Last Name of the member	
First Name	First name of the member	
Home Phone	Member's home phone #	
Email	Member's email address	
Address 1	Member's mailing address	Hide
Address 2	Member's mailing address	Hide
City	Member's city	Hide
State/Province	Member's State/Province	Hide
Zip/Postal Code	Member's Zip/Postal Code	Hide
DOB	Member's date of birth	Hide
Age	Member's age.	Hide
Gender	Member's gender	Hide
Package Category	Category of the membership package	
Transfer Date	Date of the transfer	
Branch Name	Name of the branch to which both packages belong to	
Transfer From	Package from which the member transferred	
Transfer To	Package to which the member transferred	

Membership Statistics (detail) – Transfers In (Branch), Transfers out (Branch)

Displays a list of members who make up the displayed count.

Column Name	Description	Hidden by default
Customer ID	The member's customer ID	
Membership ID	The membership ID of the membership.	
Last Name	Last Name of the member	
First Name	First name of the member	
Home Phone	Member's home phone #	
Email	Member's email address	
Address 1	Member's mailing address	Hide

Address 2	Member's mailing address	Hide
City	Member's city	Hide
State/Province	Member's State/Province	Hide
Zip/Postal Code	Member's Zip/Postal Code	Hide
DOB	Member's date of birth	Hide
Age	Member's age.	Hide
Gender	Member's gender	Hide
Package Category	Category of the membership package	
Transfer Date	Date of the transfer	
Branch Name	Name of the branch to/from which the customer transferred	
Transfer From	Branch from which the member transferred	
Transfer To	Branch to which the member transferred	

Membership Statistics (detail) – Terminations

Displays a list of members who make up the displayed count.

Column Name	Description	Hidden by default
Customer ID	The member's customer ID	
Membership ID	The membership ID of the membership.	
Pass Number	Member's pass number	Hide
Last Name	Last Name of the member	
First Name	First name of the member	
Home Phone	Member's home phone #	
Email	Member's email address	
Address 1	Member's mailing address	Hide
Address 2	Member's mailing address	Hide
City	Member's city	Hide
State/Province	Member's State/Province	Hide
Zip/Postal Code	Member's Zip/Postal Code	Hide
DOB	Member's date of birth	Hide
Age	Member's age.	Hide
Gender	Member's gender	Hide
Package Category	Category of the package category	
Package Name	Name of the package terminated by the member	
Termination Date	Date when the membership was terminated	

Termination Reason	The reason for termination	
Branch Name	Name of the branch	Hide
Member Since	The member's effective start date	
Membership Expiry	The date when a member's membership expired	
Transaction Cancellation	The date when a member's membership was cancelled	

Membership Statistics (detail) – Suspended

Displays a list of members who make up the displayed count.

Column Name	Description	Hidden by default
Customer ID	The member's customer ID	
Membership ID	The membership ID of the membership.	
Pass Number	Member's pass number	Hide
Last Name	Last Name of the member	
First Name	First name of the member	
Home Phone	Member's home phone #	
Email	Member's email address	
Address 1	Member's mailing address	Hide
Address 2	Member's mailing address	Hide
City	Member's city	Hide
State/Province	Member's State/Province	Hide
Zip/Postal Code	Member's Zip/Postal Code	Hide
DOB	Member's date of birth	Hide
Age	Member's age.	Hide
Gender	Gender of the member	Hide
Branch Name	Branch of the suspended membership package	Hide
Package Category	Category of the membership package	
Package Name	Name of the package suspended by the member	
Suspend Start Date	The member's suspend start date	
Suspend End Date	The member's suspend end date	

Membership Usages

Note:

- The **Membership Usages** report is specifically designed to report on memberships for YMCAs.

Use the **Membership Usages** report to identify your most frequent membership users so that you can determine which members are the most popular and which memberships may require additional attention.

To run the **Membership Usages** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Memberships**.
3. In the **Repository** area, click **Membership Usages**.

Specify the following input controls when you run the **Membership Usages** report:

Input Control Name	Description
Site	Filter the report by site.
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by membership usage date.
Package Category	Filter the report by package category.
Package Status	Filter the report by package status.
Package	Filter the report by package. The packages that display depend on the **Package Category** that you have selected above.
Alternate Key Type	Filter the report by Alternate Key Type.
Scan Status	Specify whether or not you want to include the following types of scans in the report: • Valid Scans • Invalid Scans Includes invalid scans for both active and inactive members. • Zero Scans
Group by	Select one of the following methods to group information in this report:

	• Member Names
	• Packages
	• Day
	• Year Month

From the **Summary** version of the **Membership Usages** report, you can click a date or transaction site in the report to view a list of usages that make up that grouping. The following information is included for the **Membership Usages** report:

Column Name	Available on	Description	Hidden by default
Members Names	Summary Detail	The first and last name of each member. This column displays only if you have chosen to Group by Member Names above.	
Customer DOB	Summary	This column displays only if you have chosen to Group by Member Names.	Yes
Age Category	Summary	This column displays only if you have chosen to Group by Member Names.	Yes
Customer ID	Summary Detail	Customer ID of the member	
Package	Summary	The name of each membership package. This column displays only if you have chosen to Group by Package above.	
Day	Summary	The date of each usage. This column displays only if you have chosen to Group by Day above.	
Year Month	Summary	The year month of each usage. This column displays only if you have chosen to Group by Year Month above.	
# of Scan	Summary	The total number of scans for the specified date range. Note: The # of Scans depends on the Scan Status filter as follow: • Valid Scans: the # of Scans column includes valid scans only • Invalid Scans: the # of Scans column includes invalid scans only	

		• Zero Scans: the # of Scans column displays zero scans	
Site ID	Detail	The site where the pass was scanned.	
Site Name	Detail	The package site.	
Package Category	Detail	The package's category.	
Package Name	Detail	The membership package associated with this scan.	
Pass #	Detail	The membership pass number.	
Member Since	Detail	The date from which this person is counted as a member.	
Check in Date	Detail	The date that the member checked in.	
Check in Time	Detail	The time that the member checked in.	
Voided	Detail	This column displays Yes or No to indicate whether the membership usage is voided or not.	
Entry Point	Detail	The entry point that the member checked in.	
Reason Declined	Detail	The reason the customer was declined for entry.	Yes
Membership Since	Detail	The Member Since is the initial join date of the current continuous membership cycle.	
Join Date	Detail	The date customers started in the membership package If the member was in package A and transferred to package B, the join date should be the date they joined package A. If the member had a prior membership but it was terminated and the member joined again (after the retention grace period), the join date should be the date they rejoined.	
Expiration Date	Detail	The date that membership package will expire	
Home Phone	Detail	Home phone for the customer	Yes
Address	Detail	Member's residential address	Yes
Email	Detail	Member's Email address	Yes
City	Detail	The member's city name	Yes

State / Prov	Detail	The member's state/province	Yes
Postal Zip Code	Detail	The member's zip code	Yes
DOB	Detail	Customers' dates of birth	Yes
Alternate Key Indicator	Detail	Displays Yes or No to indicate if the member has any alternate keys. For members with the Yes Alternate Key Indicator, click the Yes link to view a list of the member's alternate keys.	Yes

Membership Usages by Alternate Key

Use the **Membership Usages by Alternate Key** report to view membership usages for different alternate key types and identify the most popular alternate key types.

Note this report includes membership usages for members who have associated alternate keys. These membership usages do not necessarily have to use alternate keys.

To run the **Membership Usages by Alternate Key** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Memberships**.

3. In the **Repository** area, click **Membership Usages by Alternate Key**.

Specify the following input controls when you run the **Membership Usages by Alternate Key** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by membership usage date.
Package Site	Filter the report by package site. .
Package Category	Filter the report by package category.
Package Status	Filter the report by package status.
Package	Filter the report by package. The packages that display depend on the **Package Category** that you have selected above.
Alternate Key Type	Filter the report by Alternate Key Type.
Scan Status	Specify whether or not you want to include the following types of scans in the report: • Valid Scans • Invalid Scans Includes invalid scans for both active and inactive members. • Zero Scans
Entry Point	Select one or more entry points to filter this report.
Hide 'Prevent Further Use' Alternate Key Types	To exclude memberships for which the alternate key types are configured to Prevent Further Use in the AUI, click the dropdown and select Yes.

The **Membership Usages by Alternate Key** report only includes Detail version.
The following information is included in the Detail version:

Column Name	Description	Hidden by default
Alternate Key Type	Type of the Alternate Key.	
Alternate Key ID	ID of the Alternate Key	
Alternate Key Status	Status of the Alternate Key	
Site ID	The site where the pass was scanned.	
Site Name	The package site.	
Package Category	The package's category.	
Package Name	The membership package associated with this scan.	
Pass #	The membership pass number.	
Customer ID	Customer ID of the member	
Members Name	The first and last name of each member.	
Member Since Date	The date from which this person is counted as a member.	
Join Date	The date customers started in the membership package If the member was in package A and transferred to package B, the join date should be the date they joined package A. If the member had a prior membership but it was terminated and the member joined again (after the retention grace period), the join date is the date they rejoined.	
Expiration Date	The date that membership package will expire.	
Check in Date	The date that the member checked in.	
Check in Time	The time that the member checked in.	
Entry Point	The entry point that the member checked in.	
DOB	The member's dates of birth	Yes
Reason Declined	The reason the customer was declined for entry.	Yes
Customer Type	The member's Customer type	Yes
Home Phone	Home phone for the customer	Yes

Address	Member's residential address	Yes
Email	Member's Email address	Yes
Customer City	The member's city name	Yes
State / Prov	The member's state/province	Yes
Postal Zip Code	The member's zip code	Yes

Termination

Note:

- For the differences between **Termination -YMCA** and **Termination – Parks & Recreation** reports, refer to the table below:

Termination -YMCA	Termination – Parks & Recreation
Retention eligible memberships	Non-retention eligible memberships
Punch passes are not included	Punch passes are included

You can use the **Termination** report to view a list of customers who have terminated their memberships over a specified date range, including their termination details.

To run the **Termination** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Memberships**.

3. In the **Repository** area, click **Termination**.

Specify the following input controls when you run the **Termination** report:

Input Control Name	Description
Package Site	Filter the report by site. Packages associated with the selected sites are returned.
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by membership termination date.
Package Category	Filter the report by package category.
Package Status	Filter the report by package status.
Scan Status	Specify whether or not you want to include the following types of scans in the report: - Open - Closed
Package	Filter the report by package. The packages that display depend on the **Package Category** that you have selected above.

When you run the **Termination** report only includes Detail version. The following information is included in the Detail version:

Column Name	Description	Hidden by default
Customer ID	The member's customer ID	
Membership ID	The membership ID.	Yes
Pass Number	Member's pass number	Yes
First Name	First name of the member	
Last Name	Last Name of the member	
Home Phone	Member's home phone #	
Email	Member's email address	
Address 1	Member's mailing address	Yes
Address 2	Member's mailing address	Yes
City	Member's city	Yes
State/Province	Member's State/Province	Yes
Zip/Postal Code	Member's Zip/Postal Code	Yes
DOB	Member's date of birth	Yes
Age	Member's age.	Yes
Gender	Member's gender	Yes
Package Category	The package category that the membership package belongs to	
Package Name	The package from which the member terminated	
Member Since	Member's effective start date.	
Membership Expiry	The date when a member's membership expired.	
Transaction Cancellation	The date when a member's membership was cancelled.	

Preliminary Draft

Note:

The Preliminary Draft report is available for YMCA organizations.

Use the **Preliminary Draft** report to view memberships to be drafted (for example, auto renewed) and identify potential issues (for example, credit card expiry) before the actual draft.

The **Preliminary Draft** report includes memberships that:

- are set to auto-renew
- are not suspended
- have a non-zero package fee

To run the **Preliminary Draft** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Memberships**.
3. In the **Repository** area, click **Preliminary Draft**.

Specify the following input controls when you run the **Preliminary Draft** report:

Note:

- If you run the report online, the data are limited to 1 month and no Grand Total Drill Through.

Input Control Name	Description
Revenue site	Filter the report by the site where revenue is recorded.

Preliminary Drafts
Report Generated: Sep 6, 2015 8:12:33 PM

Payer Customer ID	Payer First Name	Payer Last Name	Payer Home Phone	Draft Date	Package Fees	Usage Fees	Discounts	Scholarship	Draft Amount	Payment Type	Card/Account #	Expiration Date
66	Mary	Hills	(222) 333 - 3333	2015/09/14	$20.00	$0.00	$0.00	$0.00	$20.00	Credit Card	MasterCard × 5454	12/2015
66	Mary	Hills	(222) 333 - 3333	2015/09/15	$20.00	$0.00	$0.00	$0.00	$20.00	Credit Card	MasterCard × 5454	12/2015
119	Frank	Dylan	(185) 787 - 9527	2015/09/16	$20.00	$0.00	$0.00	$0.00	$20.00	Credit Card	MasterCard × 5454	12/2015
119	Frank	Dylan	(185) 787 - 9527	2015/09/17	$20.00	$0.00	$0.00	$0.00	$20.00	Credit Card	MasterCard × 5454	12/2015
				Grand Total	$80.00	$0.00	$0.00	$0.00	$80.00			

The **Preliminary Draft** report only includes **Detail** version. The following information is included in the **Detail** version:

Column Name	Description	Hidden By Default
Member Customer ID	The Customer ID of the primary member for a membership.	
Payer Customer ID	Customer ID of the payer. If the payer is a company, it displays '--'.	
Payer First Name	First Name of the customer or company to which the draft belongs.	
Payer Middle Name	Middle Name of the customer to which the draft belongs. Hidden by default.	Yes
Payer Last Name	Last Name of the customer or company to which the draft belongs. By default, customers are sorted alphabetically by last name then first name or company name.	
Payer Home Phone	Home phone for the customer or Phone 1 for the company. If the phone number is null, it displays "--"	
Payer Work Phone	Work phone for the customer or the Phone 2 for the company. If the phone number is null, it displays "--".	Yes
Payer Cell Phone	Cell phone number for the customer. It displays "--" for a company.	Yes
Payer Other phone #'s	Other phone for the customer. It displays "--" for a company.	Yes
Payer Address	Customer's residential street address or company' street address.	Yes
Payer City	Customer/company' address city	Yes
Payer Province/State	Customer/company' address state	Yes
Payer Postal Code/Zip Code	Customer/company' address zip code	Yes
Payer Email Address	Customer/company' email address	Yes
Join Date	Date the customer became a membership.	Yes
Package Name	Name of the package that will be auto renewed within the specified date range.	Yes
Draft Date	The next draft date for the membership renewal.	
Package Fees	Total fee to be charged prior to discounts. Note: this amount includes taxes applied to the package fees.	
Usage Fees	The usage fees being applied that will be applied to the membership renewal (including taxes).	

Discounts	The discount amount that will be applied to the membership renewal (including taxes).	
Draft Amount	For membership renewal: Draft Amount = Package Fees + Usage Fees + Discounts + Scholarship (**Note**: Discounts and scholarship are 0 or negative amounts.) The draft amount is the total amount that will be charged at the next draft date.	
Payment Type	Payment type for the draft. Values: - Credit Card - Electronic Check - Manual Deduction - Payment Plan	
Card/Account #	The last 4 digits of the credit card or bank account #. If there is no card/account #, it displays "--". (for example, when the payment type is Manual Deduction or Payment Plan)	
Expiration Date	The credit card expiration date. Format: MM/YYYY If there is no card/account #, it displays "--". (for example, when the payment type is Manual Deduction or Payment Plan)	

Punch Card Usage

You can use the **Punch Card Usage** report to view punch card usage for the required membership packages.

To run the **Punch Card Usage** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Memberships**.
3. In the **Repository** area, click **Punch Card Usage**.

Specify the following input controls when you run the **Punch Card Usage** report:

Input Control Name	Description
Package Site	Filter the report by site. Packages associated with the selected sites are returned.
Package Category	Filter the report by package category.
Package Status	Filter the report by package status.
Scan Status	Specify whether or not you want to include the following types of scans in the report: • Open • Closed
Package	Filter the report by package. The packages that display depend on the **Package Category** that you have selected above.
Expire within	Memberships expire within the specified days are returned. Default: 30

When you run the **Punch Card Usage** report only includes Detail version. The following information is included in the Detail version:

Column Name	Description	Hidden by default
First Name	First name of the member	
Last Name	Last Name of the member	
Customer ID	The member's customer ID	
Phone Number	Member's phone number	

Email	Member's email address	
Package Name	The package from which the member terminated	
Membership ID	The membership ID.	
Pass Number	Member's pass number	Yes
Usage Left	Number of usages left on the membership	
Expire Date	Membership expiry date	

Point of Sale

Inventory Adjustment

Use the **Inventory Adjustment** report to audit inventory adjustment transactions.

To run the **Inventory Adjustment** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Point of Sale**.

3. In the **Repository** area, click **Inventory Adjustment**.

Specify the following input controls when you run the **Inventory Adjustment** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by transaction date.
Product Department	Filter the report by product department. It displays the name of product department that products belong to.
Product Class	Filter the report by Product Class. It displays the name of Product Class that products belong to.
Product Site	Filter the report by Product Site. It displays the name of Product Site that products belong to.
Center	Filter the report by Center. It displays the name of Center that products belong to.

When you run the **Inventory Adjustment** report only includes Detail version. The following information is included in the Detail version:

Column Name	Description	Hidden by default
Site	Name of the site.	
Center	Number of the center.	
Date	Date of inventory adjustment transactions.	
Time	Date of inventory adjustment transactions.	

User	Name of the user who performed inventory adjustment	
Reference	It displays reference information, for example, configuration change or physical count.	
Product Name	Name of the product	
Before QTY	It displays the product quantity before inventory adjustment.	
After QTY	It displays the product quantity before inventory adjustment.	

Inventory Transfer

Use the **Inventory Transfer** report to audit inventory adjustment transactions.

To run the **Inventory Transfer** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Inventory Transfer**.

3. In the **Repository** area, click **Inventory Transfer**.

Specify the following input controls when you run the **Inventory Transfer** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by transaction date.
Product Department	Filter the report by product department. It displays the name of product department that products belong to.
Product Class	Filter the report by Product Class. It displays the name of Product Class that products belong to.
Product Site	Filter the report by Product Site. It displays the name of Product Site that products belong to.
Center	Filter the report by Center. It displays the name of Center that products belong to.

When you run the **Inventory Transfer** report only includes Detail version. The following information is included in the Detail version:

Column Name	Description	Hidden by default
Site	Name of the site.	
Center	Number of the center.	
Date	Date of inventory adjustment transactions.	
Time	Date of inventory adjustment transactions.	
User	Name of the user who performed inventory adjustment	
Product Name	Name of the product	
Transfer In/Out	It displays transfer type, such as Transfer In, Transfer Out	

Transfer QTY	It displays transfer quantity: If the transfer type is 'Transfer In', it displays a positive number. If the transfer type is 'Transfer Out', it displays a negative number.	
Reference	It displays 'transfer to' and 'transfer from' center information. If the transfer type is 'Transfer In', 'From Center' information is displayed. If the transfer type is 'Transfer Out', 'To Center' information is displayed.	

POS Sales

Use the **POS Sales** report to view which of your POS products are selling well compared to others so that you can adjust your product offerings and sales strategies accordingly.

Note:

- The Program Sales report enables users to explore up to a maximum of 62 days or 2 months of data.
- If you have selected a large number of filters in the Input Controls window, you may be required to re-select filters. This may occur if the number of filters you have selected generates a URL that exceeds Internet Explorer's maximum URL length (2083 characters).

To run the **POS Sales** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **POS**.
3. In the **Repository** area, click **POS Sales Report**.

Specify the following input controls when you run the **POS Sales** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by receipt date.
Product Site	Filter the report by the site associated with each product.
Transaction Site	Filter the report by the site where the POS sales took place.
Transaction Center	Filter the report by the transaction centers for which to report POS sales.
Transaction Workstation	Filter the report by the workstation associated with each transaction.
Product Type	Select from one or more of the following product types: • All • Activity Drop In • Standard POS Product
Grouping	Group and total the products in this report using one of the following grouping methods: • Class • Department • Sub-Class • Product

From the **Summary** version of the **POS Sales** report, you can click a class, sub-class, or product in the report to view details about the transactions that make up that grouping. The following information is included for the **POS Sales** report:

Column Name	Available on	Description
Department	Summary Detail	Department categories appear if you have selected to group this report by **Department** in the **Input Control** window above.
Class	Summary Detail	Class categories appear if you have selected to group this report by **Class** in the **Input Control** window above.
Sub-Class	Summary Detail	Sub-class categories appear if you have selected to group this report by **Sub-Class** in the **Input Control** window above.
Product	Summary	Product categories appear if you have selected to group this report by **Product** in the **Input Control** window above.
Gross QTY	Summary	The gross quantity of products sold within this department/class/sub-class/product group.
QTY Rfnd	Summary	The quantity of products refunded within this department/class/sub-class/product group, if it is not zero.
Net Qty	Summary	The net quantity of products sold within this department/class/sub-class/product group. This number is calculated using the following formula: Gross QTY – QTY Rfnd
Sale Amt	Summary	The gross amount sold within this department/class/sub-class/product group. This amount is the amount after any discounts has been applied, which should be equal to the actual paid amount.
Discount	Summary	The total discount applied to sales within this department/class/sub-class/product group.
Amt Rfnd	Summary	The total amount refunded within this department/class/sub-class/product group, if it is not zero.
Net Amt	Summary	The net amount sold within this department/class/sub-class/product group. This amount is calculated using the following formula: Gross Amt – Amt Rfnd
UPC	Detail	The Universal Product Code configured for the POS product
Product	Detail	The name of the POS product.
Gross Qty	Detail	The gross quantity sold (including zero).

Qty Refund	Detail	Quantity refunded if not zero.
Net Qty	Detail	The net quantity sold (including zero). This is the Gross Qty – Qty Refund.
Gross Amt	Detail	The gross amount sold (including zero). This is the amount after discount: the actual paid amount.
Discount	Detail	The discount applied to the sale.
Amt Refund	Detail	The amount refunded, if not zero.
Net Amt	Detail	The net amount sold (including zero). This is the Gross Amt – Amt Refund.
Receipt Number	Detail	The number of the receipt
Receipt Date	Detail	The date of the receipt.
Receipt Time	Detail	The time of the receipt.
Customer ID	Detail	The Customer ID of the customer who purchased the product.
Age	Detail	Customer age
Age Category	Detail	Age category of the customer
Product Site	Detail	The site that the product is assigned to.
Transaction Center	Detail	The transaction center for which to report sales.
Transaction Workstation	Detail	The workstation where this transaction took place.
Product Type	Detail	The product type linked to this product.

POS Product Configuration

Use the **POS Product configuration** report to view detailed POS product configuration information so that you can better manage POS products.

To run the **POS Product configuration** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **POS**.

3. In the **Repository** area, click **POS Product Configuration**.

Specify the following POS product properties to run the **POS Product Configuration** report:

Input Control Name	Description
Product Type	Select from one or more of the following product types: • All • Activity Drop In • Standard POS Product
Product Department	Filter the report by product department.
Product Class	Filter the report by product class.
Product Subclass	Filter the report by product sub-class.
Transaction Site	Filter the report by product site.

This report only includes the detail version. The following information is included in the detail version. To view description of each field, please refer here.

Column Name	Hidden
Product ID	
Product Name	
Product Description	
Site	
Product Department	
Product Class	
Product Subclass	
UPC	
Disclaimer	
Discountable	
Free Promotional Item	
Allow Individual Sale	

Log Usage	
No receipt	
Disable Item	
Default Quantity	
Default GL Account	
System Account Package	
Default Price	
Prompt for Price	
Exclude from Payment Plans	
Taxable by tax 1	Yes
Taxable by tax 2	Yes
Taxable by tax 3	Yes
Taxable by tax 4	Yes
Taxable by tax 5	Yes
Taxable by tax 6	Yes
Taxable by tax 7	Yes
Taxable by tax 8	Yes
Inventory Tracking	Yes
Inventory Tracking by Center	Yes
Reorder Alert Email	Yes
Feature 1 Name	Yes
Feature 1 List	Yes
Feature 2 Name	Yes
Feature 2 List	Yes
Total Quantity	
Last Cost	
Last Vendor	
Reorder Point	
Qualifies for Commission	
Product Type	
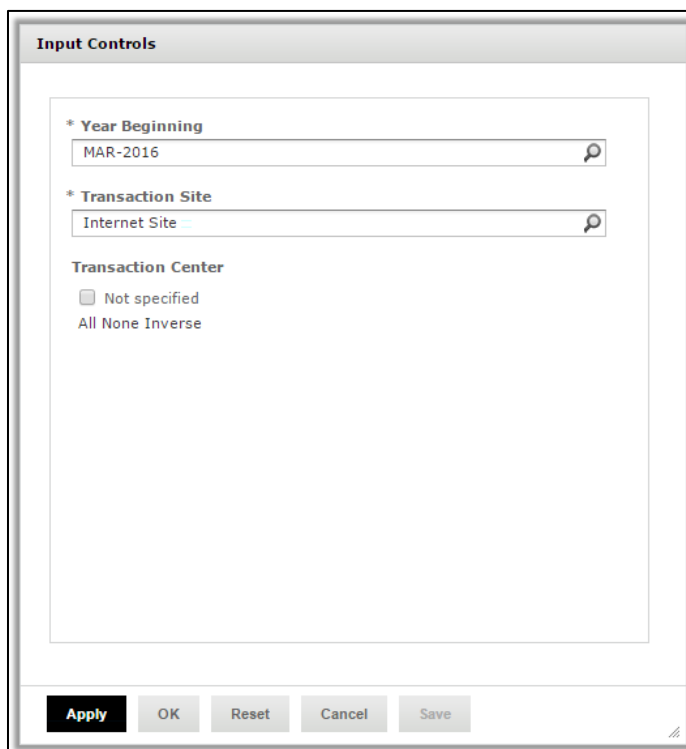
POS YTD Sales Report

Use the POS YTD (Year to Date) Sales Report to view the total sales amount of each site or product by selected months. The POS YTD Sales Report calculates the total sales by location and inventory category.

To run the **Scholarship** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **POS**.

3. In the **Repository** area, click **POS YTD Sales Report**.

Specify the following input controls when you run the **POS YTD Sales report**:

Input Control Name	Description
Year Beginning	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by the transaction date of POS receipt.
Transaction Site	Filter the report by the site where the transaction took place.
Transaction Center	Filter the report by the center where the transaction took place.

POS YTD Sales Report

Report Generated:Nov 17, 2015 1:10:39 AM

Transaction Site	Product Name	Department	2015 Jun	Jul	Aug	Sep	Oct	Nov	YTD
EAST Site	Sprite	Merchandise	$140.00	$70.00	$0.00	$0.00	$0.00	$0.00	$210.00
	Coca Cola	Merchandise	$60.00	$30.00	$0.00	$0.00	$0.00	$0.00	$90.00
	Pepsi	Merchandise	$245.00	$45.00	$0.00	$0.00	$15.00	$0.00	$305.00
	EAST Site Sub-total:		**$319.00**	**$145.00**	**$0.00**	**$0.00**	**$15.00**	**$0.00**	**$479.00**
Grand Totals			**$319.00**	**$145.00**	**$0.00**	**$0.00**	**$15.00**	**$0.00**	**$479.00**

The **POS YTD Sales** report only includes Detail version. The following information is included in the Detail version:

Column Name	Description	Hidden by default
Transaction Site	The name of the transaction site selected from the Input Control window.	
Product Name	Name of the POS Product.	
Department	Department which the POS Product is assigned to, if any.	Yes
Month	Depending on your selection of Year Beginning, data up to 12 months are displayed. Sales are calculated by month and are the net value of all sales and refund transactions for the product in the month.	
YTD	Sub-total of each item (Department/ Class/ Sub-class/ Product) for the selected months	

ACTIVE network.

Reservation

Facility Availability

Note:

- For better performance, regardless of the date range, Insights only returns data for a maximum of six months from the specified start date.

- Using the time range (Daily Start Time and Daily End Time) filter may return timeslots that start or end outside the specified time range. For example, if the specified time range is 9AM-10AM, a facility which is available from 8AM to 11AM will be returned.

- When the specified time range is less than the specified minimum duration, no results will be returned. For example, if the specified time range is 9AM-10AM and the minimum duration is 90 minutes, then no results will be returned.

  To filter this report by time range and minimum duration, ensure that the minimum duration is less than or equal to the time range. Facilities that meet the other filter conditions whilst overlapping the specified time range for the minimum duration will be returned.

  For example, if the specified time range is 8AM-10AM and the minimum duration is 60 minutes:

	7AM	8AM	9AM	10AM	11AM	Returned?
Specified time range						
Timeslot A						Yes
Timeslot B						Yes
Timeslot C						Yes
Timeslot D						Yes
Timeslot E						Yes
Timeslot F						No
Timeslot G						No
Timeslot H						No

Use the **Facility Availability** report to view facilities that are reserved, available or closed during the specified date range.

To run the **Facility Availability** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Reservations**.

3. In the **Repository** area, click **Facility Availability**.

Specify the following input controls when you run the **Facility Availability** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by reservation date. Required.
Daily Start/End Time	Select the time range to filter the report by reservation time. Reservations within the specified time range are returned. Required.
Facility Type	Filter the report by facility type
Facility	Multi-select required facilities to filter the report
Days of the week	Multi-select required days of the week to filter the report
Minimum Duration (minutes)	Facilities that are reserved, available or closed for the specified time duration or longer are returned. Default value: 30
Available Status	Filter the report by available status: • Available • Booked • Closed (Skip dates and outside of hours of operation)

The **Facility Availability** report only includes Detail version. The following information is included in the Detail version:

Column Name	Description	Hidden
Reservation Site	The site name that the facility is associated with	
Facility	Facility name	
Child Facility	The facility's child and grandchild facilities (separated by commas)	Yes
Day of the week	Day of the week	
Date	Date	
Duration (minutes)	The total reserved, available or closed time duration for the facility	
Time From	Time From	
Time To	Time To	

Facility Capacity Tracking

Use the **Facility Capacity Tracking** report to track the total number of customers by hourly timeslots on a specific date in the organization's facilities.

To run the **Facility Usage Statistics** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Reservations**.

3. In the **Repository** area, click **Facility Capacity Tracking**.

Specify the following input controls when you run the **Facility Capacity Tracking** report:

Input Control Name	Description
Date	Select the date using the calendar or enter the date in YYYY-MM-DD format (required).
Site	Filter the report by reservation sites (optional).
Center	Filter the report by centers (optional).
Facility Type	Filter the report by facility types (optional).

The following information is included in the **Facility Capacity Tracking** report:

Note: A customer who checks in but does not check out on the same day is counted as checking out at 24:00.

Column Name	Description	Hidden
Facility Number	Facility number	
Facility Name	Facility name	
Date	Date	
Total Capacity	The total capacity of the facility (the facility's Check in & out Entry point maximum capacity; if no maximum capacity is configured, then this field is blank).	
Total Attendance	The total attendance in the facility on the specified Date.	
0:00 to 1:00	The total number of customers in the facility during this timeslot.	
1:00 to 2:00	The total number of customers in the facility during the corresponding timeslot.	
2:00 to 3:00		
3:00 to 4:00		

Time		
4:00 to 5:00		
5:00 to 6:00		
6:00 to 7:00		
7:00 to 8:00		
8:00 to 9:00		
9:00 to 10:00		
10:00 to 11:00		
11:00 to 12:00		
12:00 to 13:00		
13:00 to 14:00		
14:00 to 15:00		
15:00 to 16:00		
16:00 to 17:00		
17:00 to 18:00		
18:00 to 19:00		
19:00 to 20:00		
20:00 to 21:00		
21:00 to 22:00		
22:00 to 23:00		
23:00 to 24:00		

Facility Charge Matrix

To search for all standard charges linked to a specific customer type, center, facility, facility type, site, and/or event type, use the **Facility Charge Matrix** report to display details of each charge.

To run the **Facility Charge Matrix** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Reservations**.

3. In the **Repository** area, click **Facility Charge Matrix**.

Specify the following input controls when you run the **Facility Charge Matrix** report:

Input Control Name	Description
Site	Filter the report by site
Center	Filter the report by center
Customer Type	Filter the report by customer type
Facility Type	Filter the report by facility type
Event Type	Filter the report by event type
Facility	Filter the report by facility

The report then lists all matching charges. The following information is included in the report. To view description of each field, please refer here.

Column Name	Hidden
Charge ID	
Charge Name	
Charge Type	
Customer Type	
Center	
Facility	
Facility Type	
Site	
Event Type	
Prefill Condition	
GL Account	
System Account Package	

Default Fee	
Holiday Rates	
Unit of Measure	
Default Quantity	
Charge once per permit?	
Charge is a deposit?	
Discountable?	
Exclude from Payment Plans?	
Extra Booking Fee?	
Taxable by tax 1	
Taxable by tax 2	
Taxable by tax 3	Yes
Taxable by tax 4	Yes
Taxable by tax 5	Yes
Taxable by tax 6	Yes
Taxable by tax 7	Yes
Taxable by tax 8	Yes
Minimum Age Years	
Maximum Age Years	
Online Question	
Activation Code	
Allow Qty to be selected online	
Minimum Qty Allowed	
Maximum Qty Allowed	
Activation Date	
Expiration Date	
Stage Sequence	
Permit level stage sequence	
Facility level stage sequence	

Facility Configuration

The **Facility Configuration** report provides staff users with detailed configuration information so that they can easily manage multiple facilities. The report result page lists all matching facilities and their configurations.

To run the **Facility Configuration** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Reservations**.

3. In the **Repository** area, click **Facility Configuration**.

Specify the following activity configuration properties to filter workstations:

- Site

- Center (excluding those marked as 'Prevent Further Use')

- Facility Type (excluding those marked as 'Prevent Further Use')

- Reservation Unit

This report only includes the detail version. The following information is included in the detail version. To view description of each field, please refer here.

Column Name	Hidden
Facility Number	
Facility Name	
Date Range	
Days of Week	
Time Range	
Description	
Facility Type	
Dressing Rooms Number (clicking a number displays **Dressing Room Name**, **Pair With Room**, **Center**, **Prevent Further Use** columns)	
Site	
Site Phone Number	
Geographic Area	
Site Address1	Yes
Site Address2	Yes

Site City	Yes
Site State	Yes
Site Zip Code	Yes
Center	
Center Phone Number	
Center Address1	
Center Address2	
Center City	
Center State	
Center Zipcode	
Override Center Address	
Override Address1	
Override Address2	
City	
State	
Zipcode	
RETIRED	
Min. Capacity	
Max. Capacity	
Reserve By	
Online Reservation Type	
Internet Reservation Process	
Disclaimer	
Hide on Internet	
No Internet Permits	
Max Res. Per Customer Per Day	
Notes	
Send Email to Supervisor?	
Notification email	
Open 24 HRS	Yes
Default Open Time	Yes
Default Close Time	Yes

Facility Usage Statistics

Use the **Facility Usage Statistics** report to view facility usage statistics, facilities available for reservation and determine if current facilities should be expanded or closed according to usage levels.

To run the **Facility Usage Statistics** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Reservations**.
3. In the **Repository** area, click **Facility Usage Statistics**.

Specify the following input controls when you run the **Facility Usage Statistics** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by reservation date.
Reservation Site	Filter the report by reservation site where the reservation is made.
Center	Filter the report by center
Facility Type	Filter the report by Facility Type
Event Type	Filter the report by Event Type
Schedule Type	Filter the report by Schedule Type
Grouped By	Group and total the reservations in this report using one of the following grouping methods: • Center • Facility Type • Reservation Site

In the **Facility Usage Statistics** report **Summary** version, you can click a center, facility type or reservation site to view the **Detail** version.

The following information is included in the **Facility Usage Statistics** report:

Column Name	Available on	Description	Hidden
Reservation Site	Summary Detail	The site name that the facility is associated with. It displays when the grouping method is "Reservation Site".	
Center	Summary Detail	The Center that the facility is associated with. It displays when the grouping method is "Center".	

Facility Type	Summary Detail	The Facility Type that the facility is associated with. It displays when the grouping method is "Facility Type".	
Hours Reserved	Summary Detail	The number of hours that the facility was booked within the specified reporting date range.	
Event Hours Reserved	Summary Detail	The duration (in hours) of the event. Event Hours Reserved = (Hours Reserved) – (Set-up Hours Reserved) – (Clean-up Hours Reserved)	
Set-up Hours Reserved	Summary Detail	The time (in hours) required to set up the facility before the event.	
Clean-up Hours Reserved	Summary Detail	The time (in hours) required to clean up the facility after the event.	
Hours Available	Summary Detail	The sum of the total available hours that the facility can be booked within the specified reporting date range.	
% available hours utilized	Summary Detail	It is a percentage, which equals to Hours Reserved / Hours available	
Facility Name	Detail	Facility Name	
Facility Number	Detail	It displays blank if the facility number is null.	
Days reserved	Detail	The number of days that the facility was booked within the specified date range.	
Days available	Detail	The total number of days that the facility was available to be booked within the specified date range.	
% available days utilized	Detail	It is a percentage, which equals to Days Reserved / Days available	
Total Attendance	Detail	Total attendance for the facility.	Yes
Total Revenue	Detail	Total revenue for the facility (within the specified Start/End Date period). **Note**: • For facility revenue to be logged and appear in the **Total Revenue** column, the **Administration** > **Web Admin** > **Active Staff** > **Development Aids** > **Enable Facility Revenue Background Thread** checkbox must be checked. • Dates prior to 3/2/2021 contribute zero revenue to **Total Revenue** column.	

Permit Master

Use the **Permit Master** report to view booking, event, customer and permit information.

To run the **Permit Master** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **Reservations**.
3. In the **Repository** area, click **Permit Master**.

Specify the following input controls when you run the **Permit Master** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by reservation date.
Reservation Site	Filter the report by reservation site where the reservation is made.
Center	Filter the report by center
Facility Type	Filter the report by Facility Type
Event Type	Filter the report by Event Type
Schedule Type	Filter the report by Schedule Type

When you run the Permit Master report only includes Detail version. The following information is included in the Detail version:

Column Name	Description	Hidden
Date	Date	
Day	Day of the week	
Set-up Time	Setup start time	
Set-up Minutes	Number of setup minutes	
Start Time	Start time of the booking	
End Time	End time of the booking	
Clean-up Minutes	Number of cleanup minutes	
Clean-up Time	Cleanup end time	
Facility/Equipment	Name of the facility or equipment	
Type	Facility type	

Center	Name of the center that the facility is associated with.	
Event	Name of the event	
Event Type	Event type	
Customer ID	Customer ID number	
Customer Name	Customer name	
Customer Email	Customer's email address	
Customer Home Phone#	Customer's home phone number	
Customer Cell Phone#	Customer's cell phone number	
Permit#	Permit number of the booking	
Total Booking Fees	The total booking fees (including taxes)	
Total Extra Booking Fees	The total extra booking fees (including taxes)	
Total Discount	The total discount	
Permit Price	Total price of the permit to which this booking belongs	
Permit Balance	Balance due of the permit to which this booking belongs	
Permit Status	Status of the permit	
Permit Created By	The system user who created the permit	
Permit Last Modified by	The user account who last modified the permit	Yes
Permit Last Modified Date	The date and time on which the permit was last modified	Yes

System Administration

GL List Auditing

Use the **GL List Auditing** report to view the organization's GL accounts in a single report.

To run the **GL List Auditing** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **System Administration**.

3. In the **Repository** area, click **GL List Auditing**.

Specify the following input controls when you run the **GL List Auditing** report:

Input Control Name	Description
Site	Select the required sites. If no sites are selected, then accounts for all sites will be included in the report.
Is it a system account?	Select **Yes** or **No**. If neither option is selected, then both system and non-system accounts will be included in the report.
Prevent further use?	Select **Yes** or **No**. If neither option is selected, then all accounts will be included in the report.

The following information is included in the **GL List Auditing** report:

Column Name	Description	Hidden
Account Name	GL Account Name	
Account Number	GL Account Number	
Account Type	GL Account Type	
Financial Department	If the account is a system account, then this is blank, otherwise this is the non-system account financial department.	
Site	If the account is a system account, then this is blank, otherwise, this is the non-system account site.	
Allow debit to offset credits?	**Yes** or **No**	
Prevent Further Use?	**Yes** or **No**	
Is it a system account?	**Yes** or **No**	

System Account Type	If the account is a system account, then this is system account type, other wise this is blank.	
Activated?	**Yes**, **No** or blank	

Obligatory Waiver report

The **Obligatory Waiver** report allows staff users to view which customers have or have not signed an obligatory waiver.

Note that for organizations with more than 500,000 customer accounts, it is recommended that users run the **Obligatory Waiver** report on a schedule, instead of directly running the report.

To run the **Obligatory Waiver** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **System Administration**.

3. In the **Repository** area, click **Obligatory Waiver**.

Specify the following input controls when you run the **Obligatory Waiver** report:

Input Control Name	Description
Waiver Description	Select an obligatory waiver to filter the report
Customer Type	Select one or multiple customer types to filter the report
Waiver Status	Whether the customer has signed (Complete) or not signed (Incomplete) the waiver.

The following information is included for the **Obligatory Waiver** report:

Column Name	Description	Hidden
Waiver Description	Waiver description (name)	
Customer ID	Customer ID	
Customer First Name	The customer's first name	
Customer Last Name	The customer's last name	
Customer Type	The customer's customer type	
Residential Status	The customer is a resident or non-resident	
Retired Status	The customer account is active or retired	
Signed By	The name of the user who signed the waiver	
Signed On	The date on which the waiver was signed	
Waiver Status	The waiver is signed (Complete) or not signed (Incomplete).	

System User Profile

To allow administrators to better manage user access, use the summary **System User Profile** report view all system user profiles and their associated user accounts.

To run the **System User Profile** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **System Administration**.

3. In the **Repository** area, click **System User Profile**.

This summary report does not have an **Input Control** window for users to filter the report.

The following information is included for the **System User Profile** report:

Column Name	Description
System User Profiles	Name of the system user profile. In the summary report, clicking a profile name to view the profile details.
System User ID	ID of the system user who have been assigned with this profile.
First Name	First Name of the system user who have been assigned with this profile.
Last Name	Last Name of the system user who have been assigned with this profile.
Employee ID	Employee ID of the system user who have been assigned with this profile.
Login Name	Login name of the system user who have been assigned with this profile.
System Admin	Whether the system user is System Amin
Site	If the system user is allowed to access all sites, this field displays All Sites. If the system user is allowed to access a single site, the site name is displayed. If the system user is allowed to access multiple sites, Multiple Sites is displayed.
Locked	Whether the system user account is locked.
Retired	Whether the system user account is retired.

Workstation Configuration

The **Workstation Configuration** report provides staff users with detailed configuration information so that they can easily manage multiple workstations. The report result page lists all matching workstations and their configuration.

To run the **Workstation Configuration** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public Folder** > **ACTIVE Net** > **System Administration**.

3. In the **Repository** area, click **Workstation Configuration**.

Specify the following workstation configuration properties to filter workstations:

- Facility

- Site

- Center

- Group

- Prevent Further Use Workstation flag

This report only includes the detail version. The following information is included in the detail version. To view description of each field, please refer here.

Column Name	Hidden
Workstation ID	
Workstation Name	
Site	
Center	
Group	
Facility	
Reservation Group	
Use scanning as search method	
Payment with a Credit Memo	
Payment with Payment Plan	
Payment by Cash	
Payment by Cash with Change Calculation	
Cash refunds	
Payment by Electronic Check - staff	

Accept Encrypted Payments	
Digital Signature	
Digital Signature Device Type	
Entry Point	
Magstripe Prefix	
Magstripe Suffix	
Default Image Directory	
Use Local Serial Port for Gate-Kicker	
Membership Scanning Sounds	
Multi Valid Packages Scan Options	
Point of Sale Layout	
Printer / Cash Drawer COM Port	
Open Cash Drawer Types	
Receipt Printer	
POS Receipt	
Ask User to Confirm POS Receipt Print	
Control Code Set	
Pole Display	
Pole Display COM Port	
Message for Pole Display	
Cash Summary Sheet Layout	
Float Amount	
Multi User, Single Cash Drawer	
Cash Summary Sheet Prompt	
Equipment Lending Layout	
Default Customer Scan Type	
Equipment Lending Sounds	
Enable Facility Waitlist Alerts	
Warn if Reserving a Waitlisted Timeslot	
Override Port	

YUSA Constituency

The YUSA folder and the reports within are specifically designed and deployed for YMCA organizations.

YUSA Constituency reports total up the number of end users by different reporting categories. The breakdown of YUSA Constituency reports allows staff users to understand the characteristics of end users. Staff users can view the movement of end users, identity potential trends, measure the impact and determine if the current strategy should be adjusted accordingly.

YUSA Constituency - Activities

Staff users can use the YUSA Constituency – Activities report to understand the age distribution of different activity categories.

To run the **YUSA Constituency - Activities** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public** > **ACTIVE Net** > **YUSA Constituency**.
3. In the **Repository** area, click **YUSA Constituency - Activities**.

Specify the following input controls when you run the **YUSA Constituency - Activities** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by activity start date.

The **YUSA Constituency - Activities** report only includes **Detail** version. The **YUSA Constituency - Activities** report displays activity categories by row, and pre-defined age groups by column.

YUSA Constituency – Flex Reg Participants

Staff users can use the **YUSA Constituency – Flex Reg Participants** report to understand the age distribution of different departments.

To run the **YUSA Constituency – members** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public** > **ACTIVE Net** > **YUSA Constituency**.

3. In the **Repository** area, click **YUSA Constituency – Flex Reg Participants**.

Specify the following input controls when you run the **YUSA Constituency – Flex Reg Participants** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report. Flex Registration programs that have at least one program session date within the reporting date range are included in the report.

The **YUSA Constituency - Flex Reg Participants** report only includes **Detail** version. The **YUSA Constituency - Flex Reg Participants** report displays Flex Registration department by row, and pre-defined age groups by column.

YUSA Constituency – Members

Staff users can use the **YUSA Constituency – Members** report to understand the age distribution of different genders.

To run the **YUSA Constituency – members** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public** > **ACTIVE Net** > **YUSA Constituency**.

3. In the **Repository** area, click **YUSA Constituency – Members**.

Specify the following input controls when you run the **YUSA Constituency – Members** report:

Input Control Name	Description
Start/End Date	Select the date range for the report using the calendar or enter the date in YYYY-MM-DD format to filter the report by membership effective date.

The **YUSA Constituency - Members** report only includes **Detail** version. The **YUSA Constituency - Members** report displays genders by row, and pre-defined age groups by column.

YUSA Nationwide Membership

The **YUSA Nationwide Membership** report can be scheduled to be automatically run and uploaded daily to YUSA to allow YUSA to grant active YMCA members access to participating YMCAs while travelling away from their home YMCA.

To run the **YUSA Nationwide Membership** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public** > **ACTIVE Net** > **YUSA Constituency**.
3. In the **Repository** area, click **YUSA Nationwide Membership**.

Specify the following input controls to run the **YUSA Nationwide Membership** report:

Input Control Name	Description	
As Of Date	The membership as of date.	
Site	The site corresponding to the **YUSA Branch Number** below.	
YUSA Association Number	Association number assigned by YUSA to the organization.	
YUSA Branch Number	Branch number assigned by YUSA to the specific site.	
Export	N	For non-export reports used to verify the data (format the report into man-readable columns).
	Y	For export reports to be uploaded YUSA (format the report into pipe ('|') separated fields).

The **YUSA Nationwide Membership** report output includes members where their membership:

- Is retention eligible.
- Is active.
- Effective date is on or before the **As Of Date**.
- Expiration date is on or after the **As Of Date**.

Column Name	Hidden	Description
Extract Date Time Stamp	No	Date and time on which the report was run.
Member Source System	No	ActiveNet.
YUSA Association Number	No	Association number assigned by YUSA to the organization.
YUSA Branch Number	No	Branch number assigned by YUSA to the specific site.
Local Member ID	No	Customer's customer ID number.
Family Household or Unit ID	No	Primary member's membership ID number.
Membership Type	No	Individual or family membership.
Discount Group	No	Either a financial assistance or discount based on the alternate key for a company.
Primary Member First Name	No	Primary member's first name.

Primary Member Last Name	No	Primary member's last name.
Primary Member Email	No	Primary member's email address.
Member First Name	No	Member's first name.
Member Last Name	No	Member's last name.
Dependent Member	No	If the member is a primary member then 'No', else 'Yes'.
Member Email	No	Member's email address.
Member Home Phone	No	Member's home phone number.
Member Mobile Phone	No	Member's mobile phone number.
Member Address 1	No	Member's address line 1.
Member Address 2	No	Member's address line 2.
Member City	No	Member's city.
Member State	No	Member's state.
Member Zip	No	Member's postal code.
Member Country	No	Member's country.
Member Gender	No	Member's gender.
Member Date of Birth	No	Member's date of birth.
Member Barcode	No	Member's pass number.
Member Employer	No	Blank.
Emergency Contact 1 Name	No	Emergency contact 1's name
Emergency Contact 1 Phone	No	Emergency contact 1's phone number.
Emergency Contact 2 Name	No	Emergency contact 2's name.
Emergency Contact 2 Phone	No	Emergency contact 2's phone number.
Emergency Contact 3 Name	No	Blank.
Emergency Contact 3 Phone	No	Blank.
Member Join Date Original	No	Blank.
Member Join Date Current	No	The membership's effective date.
Termination Date	No	Blank.
Reason for Termination	No	Blank.
Expiration Date	No	The membership's expiration date.
Membership Status	No	The membership's status.
Termination Code	No	Blank.
Reciprocity Eligible	No	If the membership is retention eligible then 'Yes', else 'No'.
Monthly Dues Rate	No	Blank.
Monthly Discount Rate	No	Blank.
Monthly Financial Assistance Amount	No	Blank.

Listen360 Survey Reports

Reports in the **Listen360** folder are specifically designed for organizations to integrate with Listen360 customer surveys.

Listen360 reports can be scheduled to be automatically run and uploaded to the Listen360 service to send targeted surveys to activity, FlexReg program or membership usage customers.

Listen360 Activities report

The **Listen360 Activities** report returns activity customer information for use in Listen360 surveys.

To run the **Listen360 Activities** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public** > **ACTIVE Net** > **Listen360**.
3. In the **Repository** area, click **Listen360 Activities**.

Specify the following input controls to filter the **Listen360 Activities** report output:

Input Control Name	Description	
As Of Date	End date (YYYY-MM-DD) of the report period	
Identifier	Unique identifier assigned by Listen360	
Mid Session	**Yes**	The report output includes customers enrolled in an activity on any day between the first day of the current month and the **As Of Date**
	No	The report output includes customers enrolled in an activity on any day in the whole of the previous month (whole session).
Department	Include only customers of activities belonging to the selected activity departments in the report output.	

The **Listen360 Activities** report output includes activity customers where the:

- Activity is not cancelled
- **Customer Email Address** field is populated
- Transaction type is Enrolled.
- Customer is enrolled in the activity on any day:
  - between the first day of the current month and the **As Of Date** (**Mid Session** = **Y**)
  - in the whole of the previous month (**Mid Session** = **N**)

Column Name	Hidden	Description
Location Unique Reference	No	Site name

Customer Unique Reference	No	Customer's customer ID number
Customer First Name	No	Customer's first name
Customer Last Name	No	Customer's last name
Customer Email Address	No	Customer's email address
Customer Phone	No	Customer's home telephone number
Customer Mobile Phone	No	Customer's cellphone number
Customer Address	No	Customer's address line1 and address line 2
Customer City	No	Customer's city
Customer Region	No	Customer's state
Customer Postal Code	No	Customer's zip code
Job Unique Reference	No	The string "{**Identifier**}, {date as Mon-d-YYYY}-{membership usage ID}"
Subject	No	The string "Feedback Request – {**Department**}"
Department	No	Activity department name
Site Name	No	Site name
Category Name	No	Blank
Package Name	No	Blank
Membership ID	No	Blank
Since Date	No	Blank
Program Name	No	Activity name
Gender	No	Customer's gender (**M**, **F** or **N/A**)
Age	No	Customer's age on the **As Of Date**
Scan Date	No	If **Mid Session** = **Yes**, then the **As Of Date**
		If **Mid Session** = **No**, then the date of the last day of the previous month

Listen360 FlexReg report

The **Listen360 FlexReg** report returns FlexReg program customer information for use in Listen360 surveys.

To run the **Listen360 FlexReg** report:

1. Go to **View** > **Repository**.

2. In the **Folders** area, go to **Public** > **ACTIVE Net** > **Listen360**.

3. In the **Repository** area, click **Listen360 FlexReg**.

Specify the following input controls to filter the **Listen360 FlexReg** report output:

Input Control Name	Description	
As Of Date	End date (YYYY-MM-DD) of the report period	
Identifier	Unique identifier assigned by Listen360	
Mid Session	**Yes**	The report output includes customers enrolled in a FlexReg program on any day between the first day of the current month and the **As Of Date**
	No	The report output includes customers enrolled in a FlexReg program on any day in the whole of the previous month (whole session).
Department	Include only customers of FlexReg programs belonging to the selected activity departments in the report output.	

The **Listen360 FlexReg** report output includes FlexReg program customers where the:

- FlexReg program registrations are greater than zero.
- Customer's total fees for the FlexReg program are greater than or equal to zero.
- **Customer Email Address** field is populated
- Transaction type is: **Enroll**, **Transfer In**, **Delete for Refund**, **Enroll from Wait List**, **Modification**, **Enrollment**, **Enroll from Wait List**.
- Customer is enrolled in the FlexReg program on any day:
  - between the first day of the current month and the **As Of Date** (**Mid Session** = **Y**)
  - in the whole of the previous month (**Mid Session** = **N**)

Column Name	Hidden	Description
Location Unique Reference	No	Site name
Customer Unique Reference	No	Customer's customer ID number
Customer First Name	No	Customer's first name
Customer Last Name	No	Customer's last name
Customer Email Address	No	Customer's email address
Customer Phone	No	Customer's home telephone number

Customer Mobile Phone	No	Customer's cellphone number
Customer Address	No	Customer's address line1 and address line 2
Customer City	No	Customer's city
Customer Region	No	Customer's state
Customer Postal Code	No	Customer's zip code
Job Unique Reference	No	The string "{**Identifier**}, {date as Mon-d-YYYY}-{membership usage ID}"
Subject	No	The string "Feedback Request – {**Program Name**}"
Department	No	Activity department name
Site Name	No	Site name and activity department name
Category Name	No	Blank
Package Name	No	Blank
Membership ID	No	Blank
Since Date	No	Blank
Program Name	No	FlexReg program name
Gender	No	Customer's gender (**M**, **F** or **N/A**)
Age	No	Customer's age on the **As Of Date**
Scan Date	No	If **Mid Session** = **Yes**, then the **As Of Date**
		If **Mid Session** = **No**, then the date of the last day of the previous month

Listen360 Membership report

The **Listen360 Membership** report returns customer information for membership usage scans for use in Listen360 surveys.

To run the **Listen360 Membership** report:

1. Go to **View** > **Repository**.
2. In the **Folders** area, go to **Public** > **ACTIVE Net** > **Listen360**.
3. In the **Repository** area, click **Listen360 Membership**.

Specify the following input controls to filter the **Listen360 Membership** report output:

Input Control Name	Description
As Of Date	End date (YYYY-MM-DD) of the report period
Identifier	Unique identifier assigned by Listen360

The **Listen360 Membership** report output includes customers with membership usage scans where the:

- membership usage scan is non-voided and authorized
- membership usage scan was within the last 7 days
- membership is retention eligible
- membership is a non-staff package
- membership expires on or after the 7th day before the **As Of Date**.
- member is 18 years old or older
- member's email address field (**Customer Email Address**) is populated

Column Name	Hidden	Description
Location Unique Reference	No	2nd, 3rd 6th and 7th characters from the GL Account Number
Customer Unique Reference	No	Customer's customer ID number
Customer First Name	No	Customer's first name
Customer Last Name	No	Customer's last name
Customer Email Address	No	Customer's email address
Customer Phone	No	Customer's home telephone number
Customer Mobile Phone	No	Customer's cellphone number
Customer Address	No	Customer's address line1 and address line 2
Customer City	No	Customer's city
Customer Region	No	Customer's state
Customer Postal Code	No	Customer's zip code
Job Unique Reference	No	The string "{**Identifier**}, {date as Mon-d-YYYY}-{membership usage ID}"

Subject	No	The string "Feedback Request – Your Experience at the {**SiteName**}"
Department	No	The string "Membership"
Site Name	No	Center name
Category Name	No	Membership category name
Package Name	No	Membership package name
Membership ID	No	Membership ID number
Since Date	No	The earliest member since date
Gender	No	Customer's gender (**M**, **F** or **N/A**)
Age	No	Customer's age on the **As Of Date**
Scan Date	No	Date on which the membership was last used.
Scan Time	No	Time on which the membership was last used.

Activity Participation Dashboard

The following dashboards are available:

Activity Enrollment:

You can view monthly activity enrollment data as a line chart, including total enrolled, online enrolled, and front desk enrolled numbers for a single year.

Activities are included based on the activity start date. For example, if an activity started on Dec 15th, 2017, then it is included in the Dec, 2017 data point.

Activity Fill Rate:

Displays a bar chart of activity fill rates for completed activities by activity category.

Fill rate = total enrollment / maximum enrollment

This reportlet applies only to activities whose activity meeting end date is on or before the current date.

Note that fill rates include parent-activities and sub-activities.

Activity Participation:

To better understand customer activity enrollment frequencies, you can view the proportion of activity enrollment frequencies for the recent year for all valid (not retired) customers.

In the frequency list, select/unselect a frequency to display/hide the frequency in the pie chart.

Revenue Trend

To better understand activity revenue trends, in the Revenue Trend dashboard, staff users can now view activity revenue trends for online and offline (CUI and AUI) enrollments in the past 12 months.

To display or hide **Online Revenue**, **Offline Revenue** or **Total Revenue** in the reportlet, click the corresponding name under the charts.

Revenues are calculated based on the activity start date. For example, if an activity started in Jan 2018, then all revenue generated by this activity is included in the Jan 2018 datapoint.

Revenues in this chart are the same as in the legacy Activity Revenue Report (Revenue = Sales Revenue + Refunds Revenue + Transfer In Revenue + Transfer Out Revenue).

Note:

◆ Amounts in this chart are rounded to the nearest thousand for abbreviation, for example, 223 is displayed as 0K and 501 is displayed as 1K.

If the online revenue is 300 and the offline revenue is 400, then the online and offline revenues are both displayed as 0K, but the total revenue is 700 and displayed as 1K.

◆ Discounts and discount-type scholarships are reconciled.

◆ ACTIVENet applies accrual accounting. Revenues do not include accounts receivable.

◆ If an activity starts within the previous 12 months or the current month, then all of the activity's revenues are included. Revenues are not affected by the deferred revenue settings.