



# ACTIVE Reserve User Guide

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Release Date	Tuesday, May 25 <sup>th</sup> , 2021
AUI Version	3.0
Release Overview	Private lessons
Market/Strategic Goals	Product milestones and usability enhancements
Target Customers	Lite and Plus Customers

# ACTIVE Reserve Release Notes

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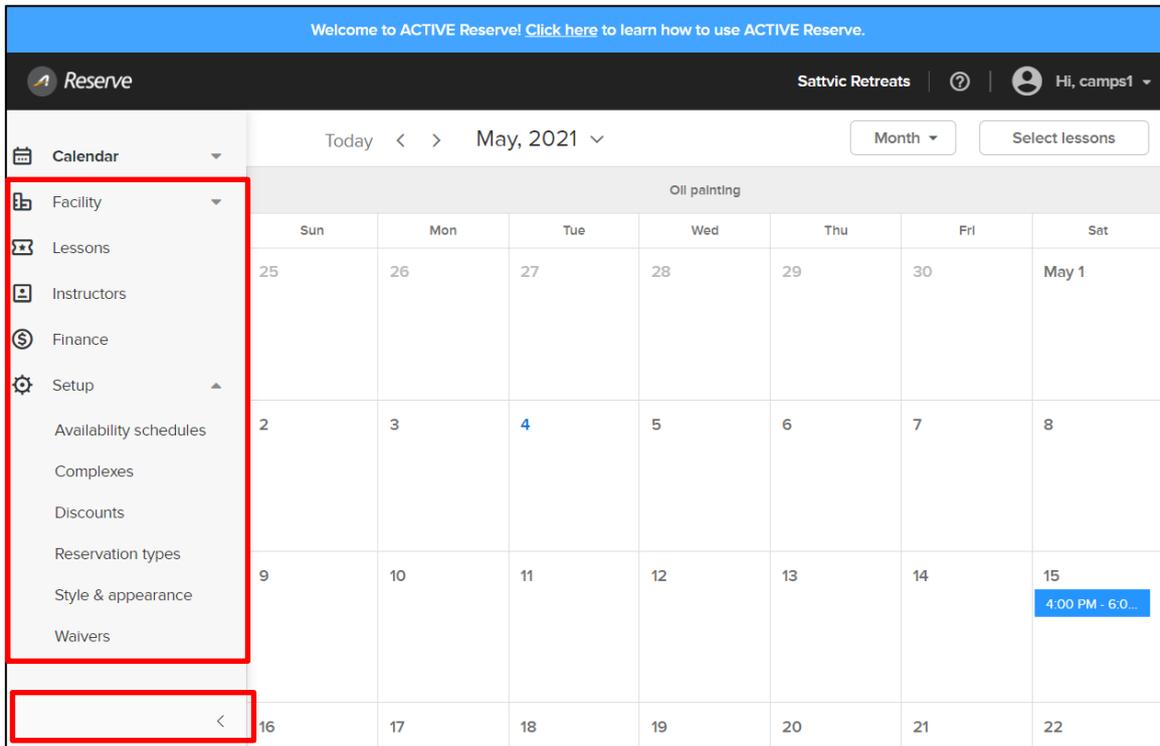
# ACTIVE Reserve Release Notes

## Private lessons

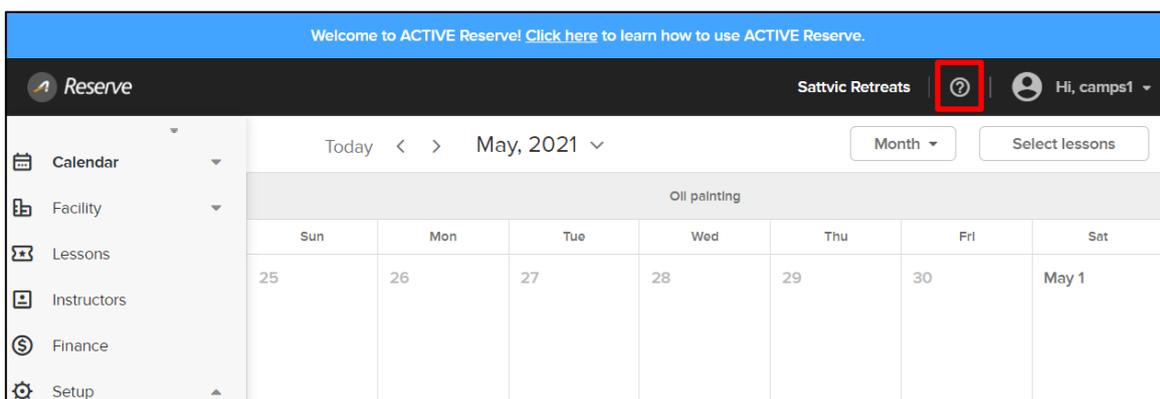
ACTIVE Reserve now provides dedicated support for creation and registration of private (1-on-1) lessons. Only CCM agency owners and administrators can access ACTIVE Reserve.

New private lessons features:

- **Lessons, Instructors, Finance, Setup > Discounts, Setup > Style & appearance** and **Setup > Waivers** links have been added to support private lessons



If users require assistance when using ACTIVE Reserve, then they can view ACTIVE Reserve support articles by clicking the ? icon:



# ACTIVE Reserve Release Notes

## Configuring complexes

On **Setup > Complexes** page, users can **Create a complex** and manage complex buildings or sites. Each complex can be assigned to a lesson as its location. A complex cannot be deleted if it is already assigned to a lesson.

Complexes			Create a complex	
NAME	ADDRESS	PHONE NUMBER		
Bright Fields	108 Bright Drive108 Bright Drive108 Bright Drive108 Bright Drive108 ...	555-867-5309		
Community Center	1234 Joy Rd., Rancho Simi, CA, 12345	555-867-5309		
North Complex	1024 North Highline Drive, Rancho Simi, CA	555-867-5309		

3 items in total

Setup > Complexes > Create a complex

### Create a complex

Complex name \*

Address information

Address line 1 \*

Address line 2

City \*

State \*

Zip code \*

Country \*

Contact information

Phone number

Fax

Contact person

## ACTIVE Reserve Release Notes

### Configuring availability schedules

On the **Setup > Availability schedules** page, users can configure lesson and instructor schedules to determine dates (including holidays), days and hours on which a lesson or an instructor is available for registration.

- An availability schedule can include multiple date ranges
- A date range can be for **Open hours** or **Closed**
- An **Open hours** schedule includes days of the week and hours when a lesson/instructor is available
- A **Closed** schedule is a day or date range during which a lesson/instructor is not available
- After a schedule has been assigned to a complex, lesson, or instructor, it can no longer be deleted (🗑 icon)

Overlapping date ranges interact without regard to whether the date ranges are **Open hours** or **Closed** as follows: If date range A completely contains date range B, then date range B takes effect on the overlapping dates.

- **Example:**
  - A **Closed** date range of 1/1/2021 – 12/31/2021
  - An **Open hours** date range of 2/1/2021 – 3/1/2021
- **Results in:**
  - 1/1/2021 – 1/31/2021 is closed
  - 2/1/2021 – 3/1/2021 is open
  - 3/2/2021 – 12/31/2021 is closed

If date range A intersects with date range B, then the date range with the later start date takes effect on the overlapping dates.

- **Example:**
  - A **Closed** date range of 1/1/2021 – 5/31/2021
  - An **Open hours** date range of 2/1/2021 – 12/31/2021
- **Results in:**
  - 1/1/2021 – 1/31/2021 is close
  - 2/1/2021 – 12/31/2021 is open.

### Example:

To configure a lesson that is available on every day of the year 2021 (1/1/2021 – 12/31/2021) on:

- Monday to Friday at 9:45am – 10:45am and 10:45am – 11:45am
- Saturday and Sunday at 9:00am – 11:00am and 1:00pm – 3:00pm

Configure an **Open hours** date range as follows:

The screenshot shows a configuration form for an availability schedule. At the top, the 'Schedule name' is 'English class schedule'. There are buttons for 'Add date range' and 'Import holidays'. Below this, the 'Set as' section has 'Open hours' selected with a radio button. The 'Date range' is set to '1/1/2021 - 12/31/2021'. There is a 'Description' field. The form contains four rows of 'Days' and 'Hours' settings. Each row has a 'Days' section with buttons for Sun, Mon, Tue, Wed, Thu, Fri, and Sat, and an 'Hours' section with two time input fields separated by 'to'. The first row has days Mon-Fri and hours 9:45 AM to 10:45 AM. The second row has days Mon-Fri and hours 10:45 AM to 11:45 AM. The third row has days Sun and Sat and hours 9:00 AM to 11:00 AM. The fourth row has days Sun and Sat and hours 1:00 PM to 3:00 PM.

## ACTIVE Reserve Release Notes

To close the lesson between Christmas Eve and New Year's Eve, configure a **Closed** date range between 12/24/2021 – 12/31/2021:

Schedule name \* English class schedule Add date range Import holidays

**Open** 1/1/2021 - 12/31/2021

Mon, Tue, Wed, Thu, Fri	9:45 AM - 10:45 AM
Mon, Tue, Wed, Thu, Fri	10:45 AM - 11:45 AM
Sun, Sat	9:00 AM - 11:00 AM
Sun, Sat	1:00 PM - 3:00 PM

Set as  Open hours  Closed

Date range \* 12/24/2021 - 12/31/2021

Description Closed due to Christmas & New Year

Schedule name \* English class schedule Add date range Import holidays

**Open** 1/1/2021 - 12/31/2021

Mon, Tue, Wed, Thu, Fri	9:45 AM - 10:45 AM
Mon, Tue, Wed, Thu, Fri	10:45 AM - 11:45 AM
Sun, Sat	9:00 AM - 11:00 AM
Sun, Sat	1:00 PM - 3:00 PM

**Closed** 12/24/2021 - 12/31/2021

Closed due to Christmas & New Year

To cancel only the morning class on Mother's Day (Saturday, 5/9/2021), create an **Open** schedule on 5/9/2021 for only the afternoon lesson at 1:00pm – 3:00pm, which overrides the previous Saturday and Sunday at 9:00am – 11:00am and 1:00pm – 3:00pm open schedule on 5/9/2021 only.

To set closed date ranges for holidays for lessons/instructors, users can click **Holidays** tab > **Add a holiday** button:

Availability schedules Holidays

2021

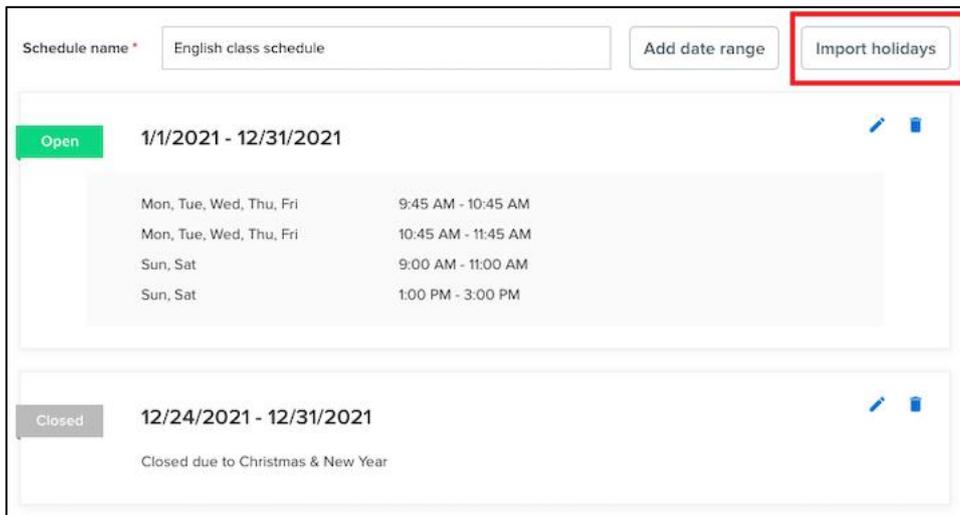
DATE HOLIDAY

1/1/2021 New Year

1 item in total

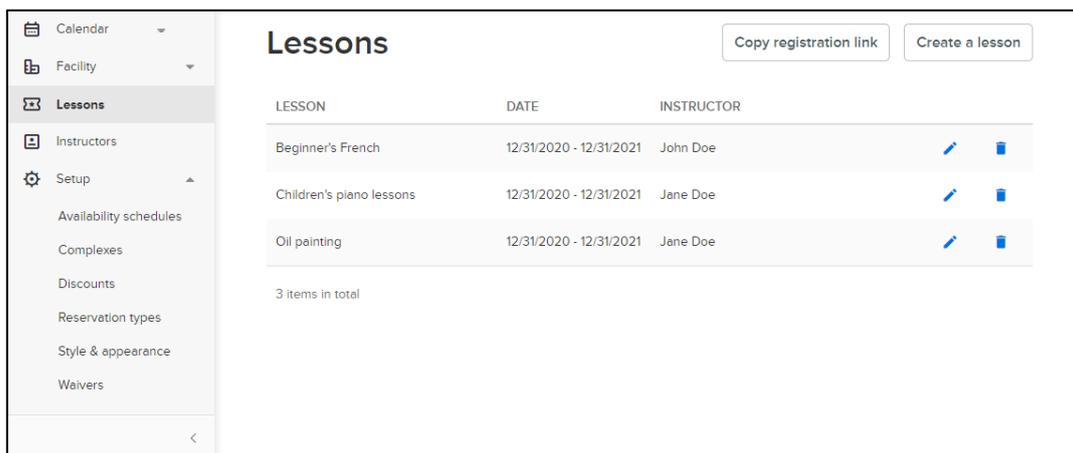
## ACTIVE Reserve Release Notes

When creating an availability schedule, users can **Import holidays** which are **Closed** dates on the schedule:

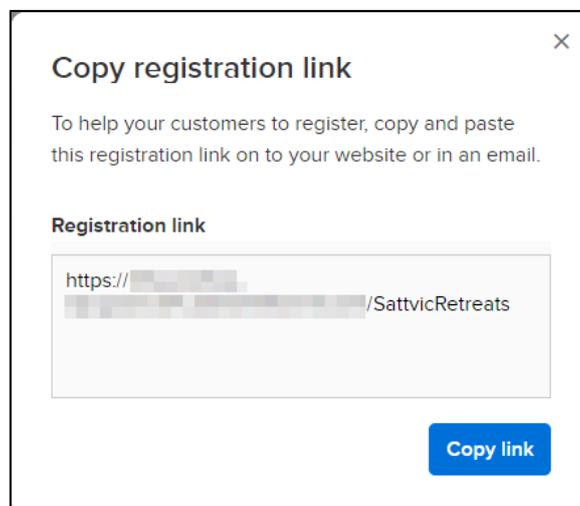


### Configuring lessons

To view and manage lessons, users can click **Lessons** link:



Users can view and copy the link to the registration website by clicking **Copy registration link** button:



## ACTIVE Reserve Release Notes

To add a new lesson, users can click the **Create a lesson** button and configure lesson details, including the lesson's:

- **Availability schedule**
- **Instructors:** if a lesson has:
  - No instructor assigned, then lesson availability follows lesson's availability schedule
  - One or more instructors assigned, then lesson availability depends on both lesson and instructor availability schedules.
  - For **example**, if a lesson is available between 9:00am - 10:00am and:
    - Instructor A is available between 9:00am - 11:00am, then lesson is available to students to book from 9:00am - 10:00am with instructor A
    - Instructor B is available between 9:30am - 11:30am, then lesson is NOT available to students to book with instructor B
    - Instructor C does not have an availability schedule assigned, then instructor C is considered as always available and the lesson can be booked by a student with instructor C
- **Lesson mode (Offline lesson or Online lesson):** note that if **Online lesson** is selected and the lesson has no instructor, then it is recommended the additional fields that appear are completed to instruct students on how to join the online lesson:

Lesson mode \* Online lesson

**i** If your lesson has one or no instructors, then you can configure online meeting information for the lesson.  
If the instructors assigned to the lesson also have online meeting information, then the instructor's online meeting information will be displayed to registrants instead of the lesson's.

Online lesson instructions

Participants can join the online lesson at this URL

Join by phone

Online lesson ID

Password

## ACTIVE Reserve Release Notes

- **Complex** (only if **Lesson mode** > **Offline lesson** was selected), **Price**, **Registration close date**, **Age range** and lesson **Description**
- **Registration start date**: the date and time on which the lesson appears on the registration site and is available to consumers to register
- **Display status (Online or Internal only)**: Internal only lessons are NOT displayed on the registration site

The screenshot shows the 'Create a lesson' form in the ACTIVE system. The form is titled 'Lessons > Create a lesson' and 'Create a lesson'. The left sidebar contains navigation options: Calendar, Facility, Lessons (selected), Instructors, Finance, Setup, Availability schedules, Complexes, Discounts, Reservation types, Style & appearance, and Waivers. The main form fields are: Lesson name (text input), Availability schedule (dropdown), Instructor (+ button), Lesson mode (dropdown, set to 'Offline lesson'), Complex (dropdown), Price (text input, set to '\$ 0.00'), Registration start date (date and time picker, set to 'MM/DD/YYYY' and '12:00 AM', with a note 'Current time zone: US/Pacific'), Registration close date (date picker, with a note 'Registration will close at 11:59 PM on this day'), Age (radio button for 'No restrictions' selected, with input fields for age range), and Display status (dropdown, set to 'Online'). A large text area for 'Description' is at the bottom. At the bottom right, there are 'Cancel' and 'Publish' buttons. The 'Registration start date' and 'Display status' fields are highlighted with red boxes.

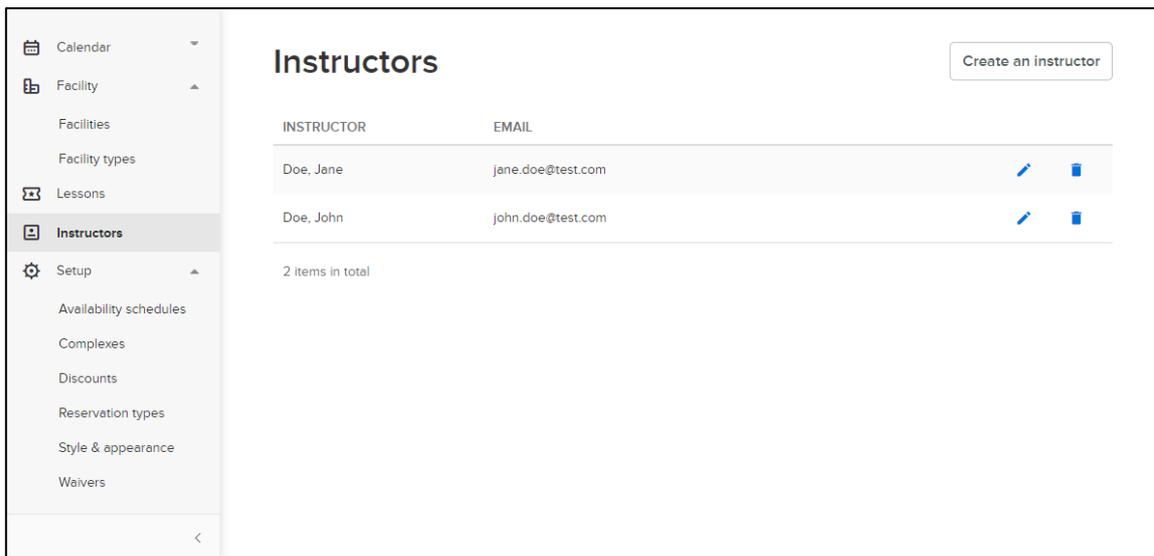
Lesson update rules are as follows:

- Can be edited (✎) a lesson before or after it is booked
- Can be deleted (🗑) a lesson before it is booked
- Cannot be deleted (🗑) a lesson after it is booked

# ACTIVE Reserve Release Notes

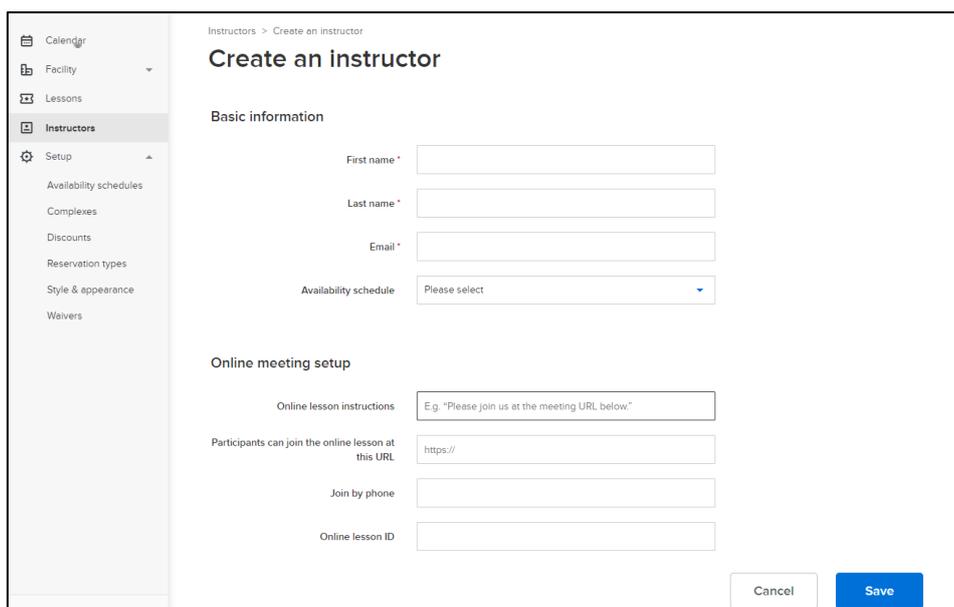
## Configuring instructors

To view and manage instructors, users can click **Instructor** link:



To add a new instructor, users can click **Create an instructor** button and then configure instructor's:

- **First name** and **Last name**.
- **Email** address: Instructors will be emailed a copy of any registration confirmations for their bookings at this email address
- **Availability schedule** (optional): Instructors without an **Availability schedule** are considered as always available schedule to teach during the **Availability schedules** of their assigned lessons
- **Online meeting setup** (optional): If this is:
  - Configured for an instructor, then this information is always included in the registration confirmation emails sent to students instead of the lesson's **Online lesson instructions**
  - NOT configured for an instructor, then the lesson's **Online lesson instructions** is included in the registration confirmation emails sent to students



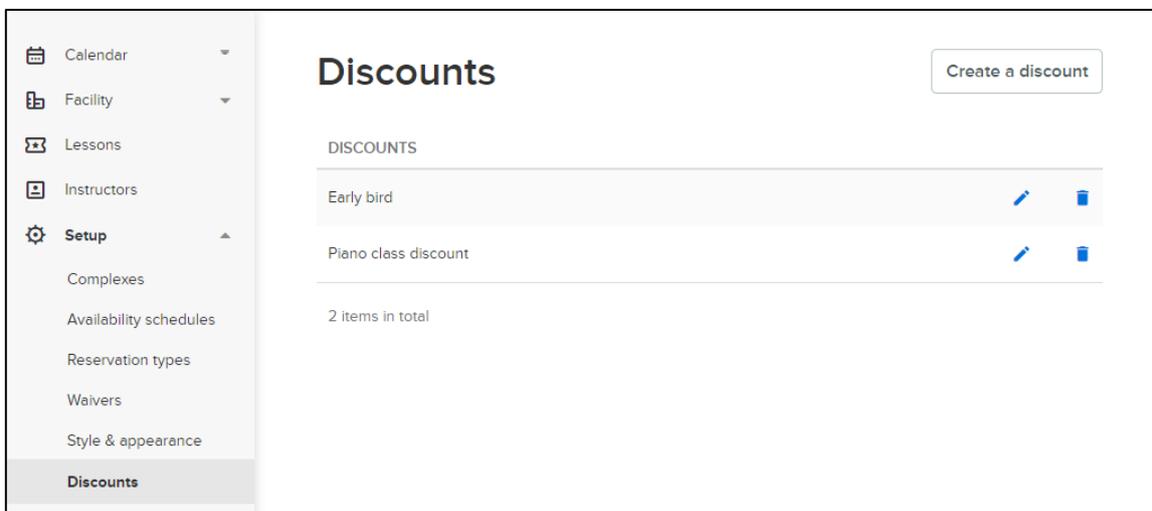
## ACTIVE Reserve Release Notes

Instructor update rules are as follows:

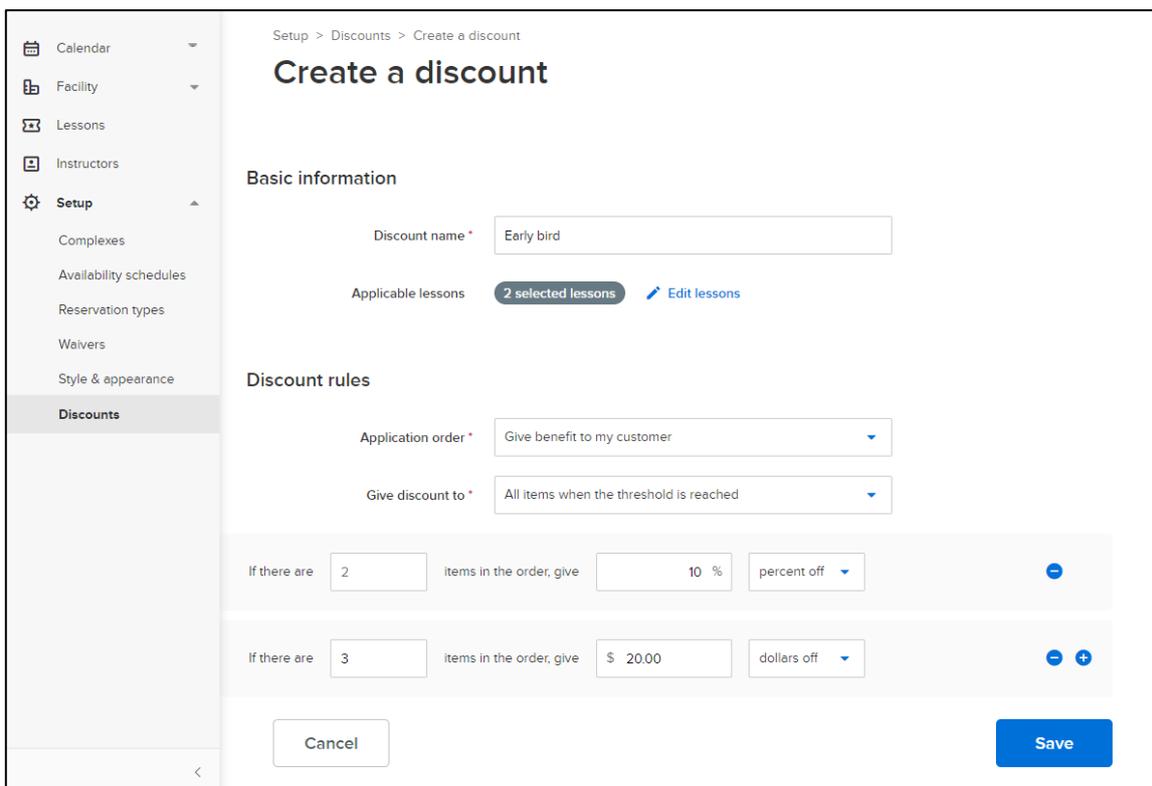
- Can be edited (✎) an instructor before or after instructor is booked
- Can be deleted (🗑) an instructor before instructor is booked
- Cannot be deleted (🗑) an instructor after instructor is booked

### Configuring discounts

To view and manage lesson-registration discounts, users can click **Discounts** link:



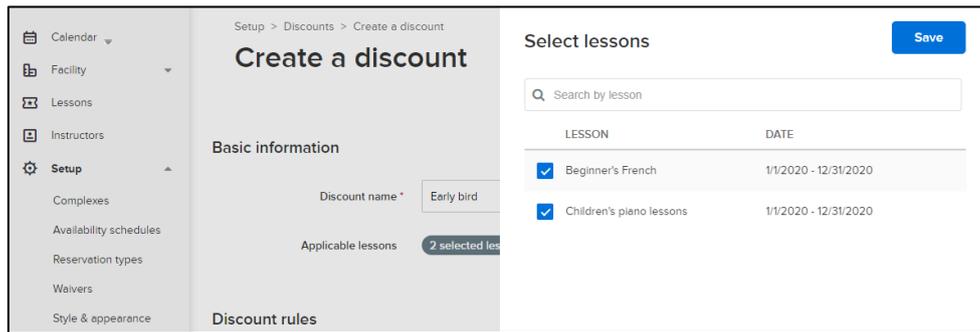
To add a new discount for lessons, users can click **Create a discount** button and then configure discount details:



- This is a multi-lesson discount that applies to all shopping cart items when the item count threshold is reached.
- Agency owners and administrators can configure up to 9 discount tiers for dollar or percentage discounts to apply to orders with more than one lesson item.

## ACTIVE Reserve Release Notes

To apply the discount to specific lessons, users can select **Applicable lessons**:



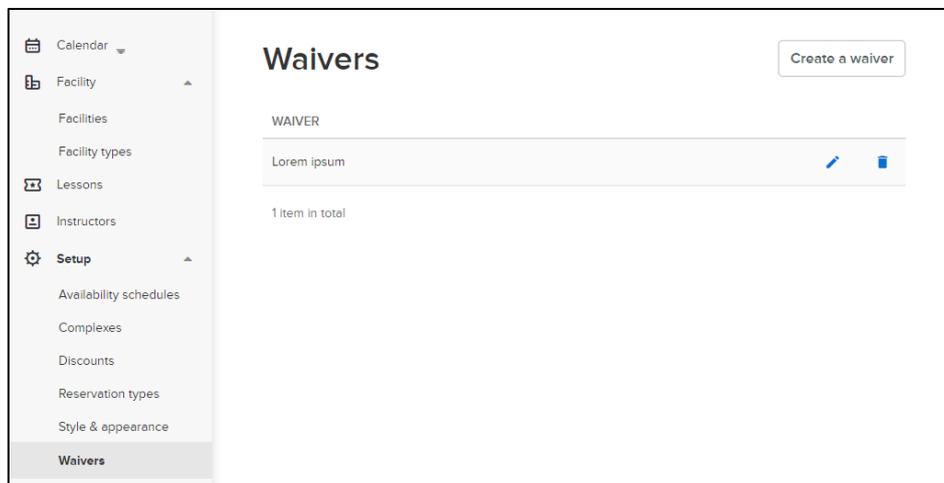
The screenshot shows the 'Create a discount' form. The left sidebar has 'Setup' expanded, with 'Discounts' selected. The main content area is titled 'Create a discount' and has a 'Save' button in the top right. Below the title is a 'Basic information' section with a 'Discount name' field containing 'Early bird' and an 'Applicable lessons' field showing '2 selected lessons'. To the right is a 'Select lessons' section with a search bar and a table of lessons.

LESSON	DATE
<input checked="" type="checkbox"/> Beginner's French	1/1/2020 - 12/31/2020
<input checked="" type="checkbox"/> Children's piano lessons	1/1/2020 - 12/31/2020

Users can also edit (✎) or delete (🗑) a discount.

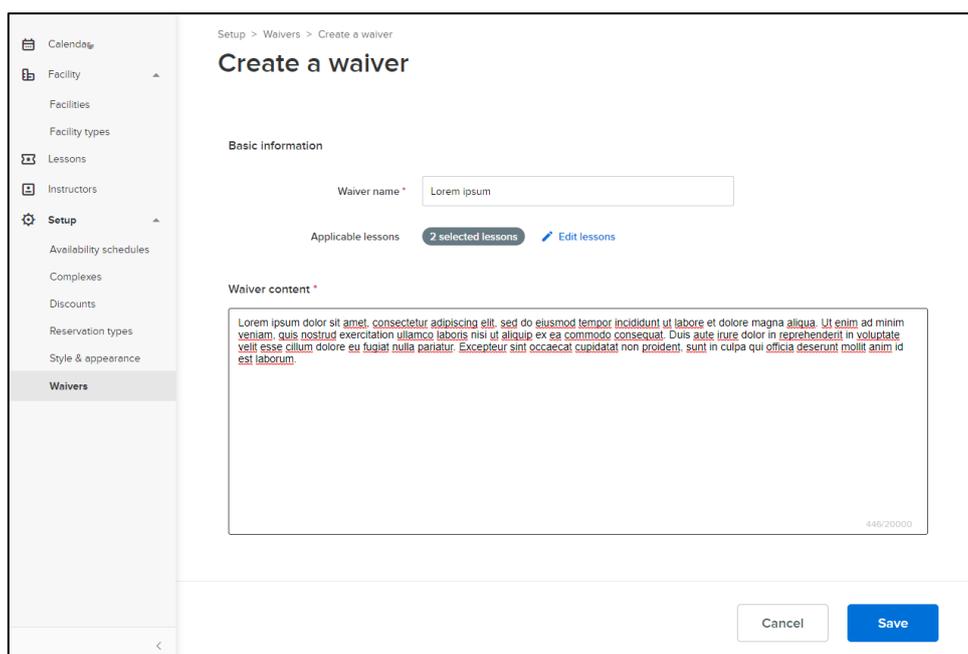
### Configuring lesson registration waivers

To view and manage lesson registration waivers, users can click **Waivers** link:



The screenshot shows the 'Waivers' management page. The left sidebar has 'Setup' expanded, with 'Waivers' selected. The main content area is titled 'Waivers' and has a 'Create a waiver' button in the top right. Below the title is a 'WAIVER' section with a text field containing 'Lorem ipsum' and edit/delete icons. Below that is a summary '1 item in total'.

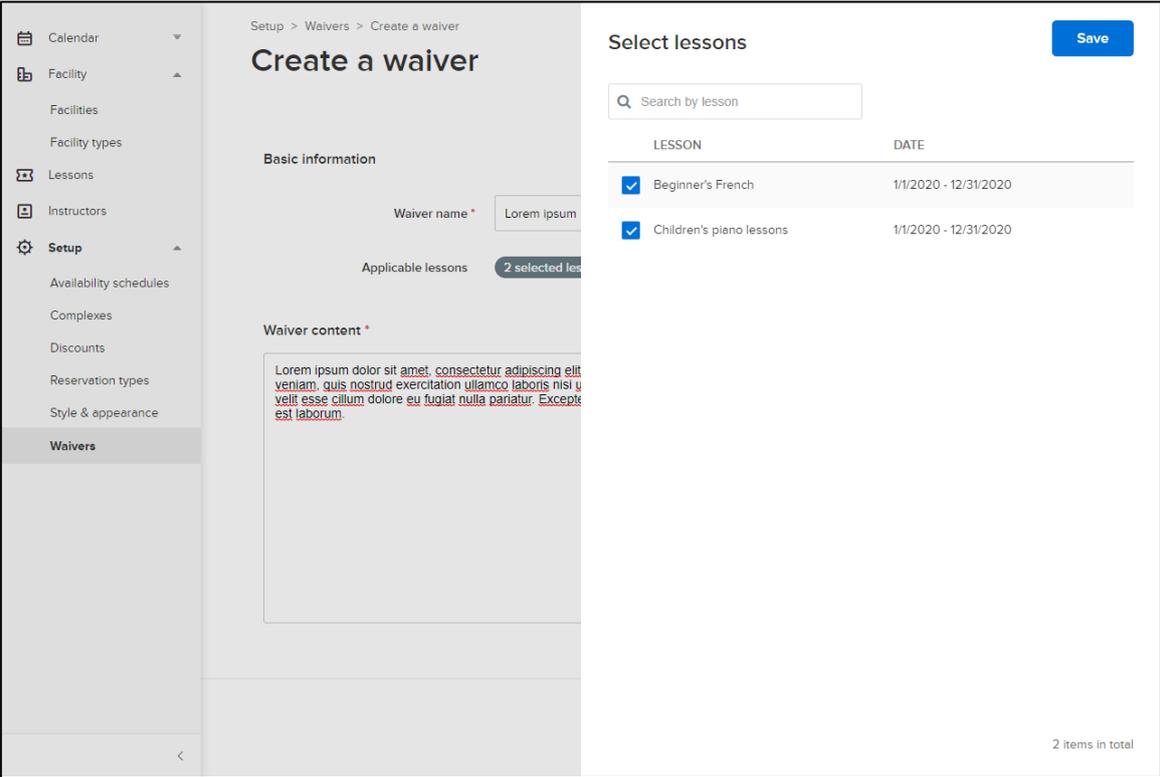
To add a new waiver, users can click **Create a waiver** button and then configure details (allows 20,000 characters):



The screenshot shows the 'Create a waiver' form. The left sidebar has 'Setup' expanded, with 'Waivers' selected. The main content area is titled 'Create a waiver' and has a 'Cancel' and 'Save' button in the bottom right. Below the title is a 'Basic information' section with a 'Waiver name' field containing 'Lorem ipsum' and an 'Applicable lessons' field showing '2 selected lessons' and an 'Edit lessons' link. Below that is a 'Waiver content' section with a large text area containing placeholder text and a character count '446/20000'.

# ACTIVE Reserve Release Notes

To apply the waiver to specific lessons, users can select **Applicable lessons**:



Waiver update rules are as follows:

- Can edit (✎) or delete (🗑) before a waiver is signed by a consumer
- Cannot be deleted after waiver is signed by a consumer

# ACTIVE Reserve Release Notes

## Viewing financial reports

Users can view ACTIVE Reserve financial reports in the **Finance** tab.

**Finance - ACTIVE Remittances** report: displays remittances from ACTIVE to agency:

Welcome to ACTIVE Reserve! [Click here to learn how to use ACTIVE Reserve.](#)

Sattvic Retreats | Hi, camps1

### Finance - ACTIVE Remittances

1 of 2 ?

Remittance period	Status	Beginning balance	Payment issued	New balance	Ending balance
<a href="#">04/16/2021 to 04/30/2021</a>	Ongoing	0.00 USD	0.00 USD	0.00 USD	0.00 USD
<a href="#">04/01/2021 to 04/15/2021</a>	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
<a href="#">03/16/2021 to 03/31/2021</a>	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
<a href="#">03/01/2021 to 03/15/2021</a>	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
<a href="#">02/16/2021 to 02/28/2021</a>	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
<a href="#">02/01/2021 to 02/15/2021</a>	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
<a href="#">01/16/2021 to 01/31/2021</a>	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
<a href="#">01/01/2021 to 01/15/2021</a>	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
<a href="#">12/16/2020 to 12/31/2020</a>	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD

All dates/times are posted in the UTC time zone.

Users can view detailed remittances for a **Remittance period** by clicking the corresponding date range:

Welcome to ACTIVE Reserve! [Click here to learn how to use ACTIVE Reserve.](#)

Sattvic Retreats | Hi, camps1

### Finance - ACTIVE Remittances

1 of 1

Remittance account : Sattvic Retreats  
 Remittance period : 04/01/2021 to 04/15/2021  
 Status : **Closed**  
 Beginning balance : 0.00 USD  
 Remittance issued : 0.00 USD  
 New balance : 0.00 USD  
 Ending balance : 0.00 USD  
 New Balance (With Issues) : 100.00 USD

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**Active Fees**

Registration	-4.95 USD
<b>Payment Received</b>	
Payments Received	104.95 USD

All dates/times are posted in the UTC time zone.