



ACTIVE Reserve User Guide

Release Date	Tuesday, May 25 th , 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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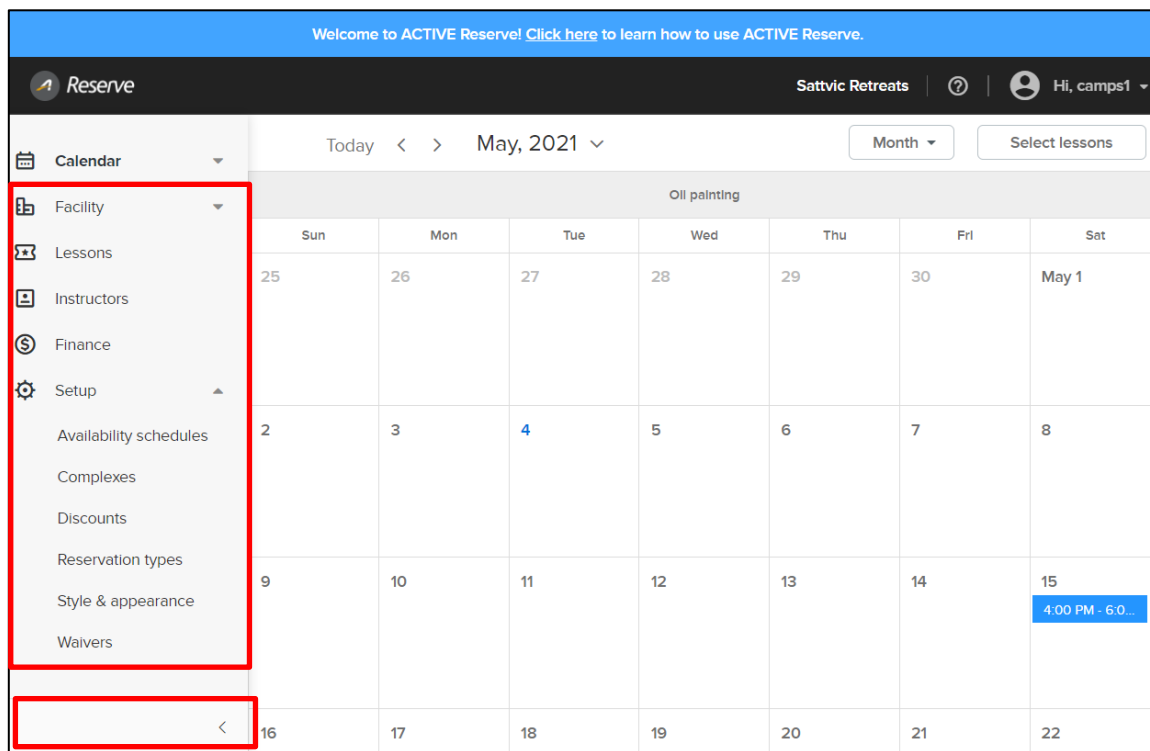
ACTIVE Reserve Release Notes

Private lessons

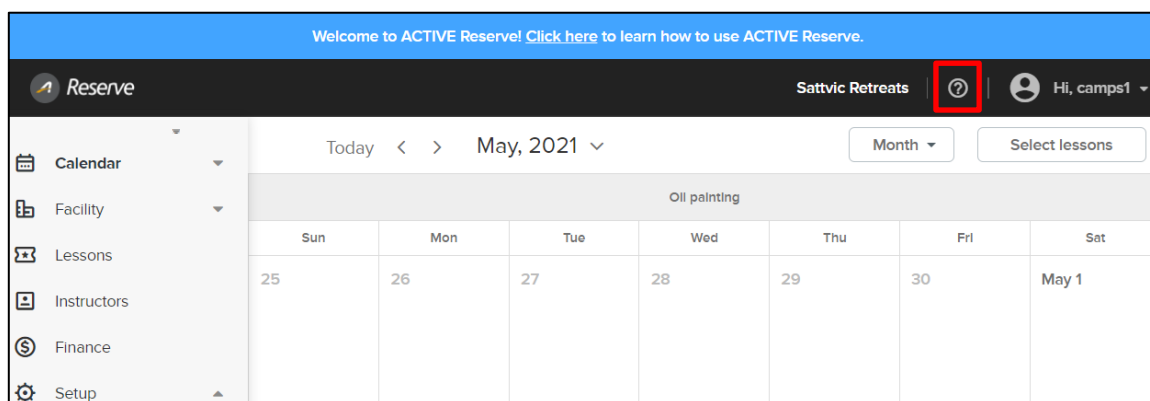
ACTIVE Reserve now provides dedicated support for creation and registration of private (1-on-1) lessons. Only CCM agency owners and administrators can access ACTIVE Reserve.

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 *

Please select

Zip code *

Country *

United States

Contact information

Phone number

Fax

Contact person

First name

Last name

Cancel

Save

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:

Schedule name * English class schedule Add date range Import holidays

Set as ☒ Open hours ☐ Closed

Date range * 1/1/2021 - 12/31/2021

Description

Days * Sun Mon Tue Wed Thu Fri Sat

Hours * 9:45 AM to 10:45 AM

Days * Sun Mon Tue Wed Thu Fri Sat

Hours * 10:45 AM to 11:45 AM

Days * Sun Mon Tue Wed Thu Fri Sat

Hours * 9:00 AM to 11:00 AM

Days * Sun Mon Tue Wed Thu Fri Sat

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 1/1/2021 HOLIDAY New Year

Copy from previous year Add a holiday

Cancel Save

1 item in total

ACTIVE Reserve Release Notes

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

The screenshot shows a form for creating an availability schedule. At the top, there is a text input field labeled 'Schedule name *' containing 'English class schedule'. To its right are two buttons: 'Add date range' and 'Import holidays'. The 'Import holidays' button is highlighted with a red rectangular box. Below the form, there are two sections. The first section is titled 'Open' and shows a date range '1/1/2021 - 12/31/2021'. It lists four time slots: 'Mon, Tue, Wed, Thu, Fri' from '9:45 AM - 10:45 AM', 'Mon, Tue, Wed, Thu, Fri' from '10:45 AM - 11:45 AM', 'Sun, Sat' from '9:00 AM - 11:00 AM', and 'Sun, Sat' from '1:00 PM - 3:00 PM'. The second section is titled 'Closed' and shows a date range '12/24/2021 - 12/31/2021'. It includes the text 'Closed due to Christmas & New Year'.

Configuring lessons

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

The screenshot shows the 'Lessons' management page. On the left is a sidebar with a menu containing 'Calendar', 'Facility', 'Lessons' (highlighted), 'Instructors', 'Setup', 'Availability schedules', 'Complexes', 'Discounts', 'Reservation types', 'Style & appearance', and 'Waivers'. The main content area is titled 'Lessons' and has two buttons: 'Copy registration link' and 'Create a lesson'. Below the title is a table with columns 'LESSON', 'DATE', and 'INSTRUCTOR'. The table contains three rows of lesson data. At the bottom of the table, it says '3 items in total'.

LESSON	DATE	INSTRUCTOR
Beginner's French	12/31/2020 - 12/31/2021	John Doe
Children's piano lessons	12/31/2020 - 12/31/2021	Jane Doe
Oil painting	12/31/2020 - 12/31/2021	Jane Doe

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

The screenshot shows a dialog box titled 'Copy registration link'. It contains the text 'To help your customers to register, copy and paste this registration link on to your website or in an email.' Below this text is a section labeled 'Registration link' which contains a text input field with the URL 'https://[redacted]/SattvicRetreats'. At the bottom right of the dialog box is a blue button labeled 'Copy link'.

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 Reserve system. The form is titled 'Lessons > Create a lesson' and 'Create a lesson'. The left sidebar contains a navigation menu with 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 *
- Availability schedule * (Please select)
- Instructor +
- Lesson mode * (Offline lesson)
- Complex * (Please select)
- Price * (\$ 0.00)
- Registration start date * (MM/DD/YYYY, 12:00 AM, Current time zone: US/Pacific) - This field is highlighted with a red box.
- Registration close date * (MM/DD/YYYY, Registration will close at 11:59 PM on this day)
- Age * (No restrictions, or Age on the selected lesson date)
- Display status * (Online) - This field is highlighted with a red box.
- Description

At the bottom right, there are 'Cancel' and 'Publish' buttons.

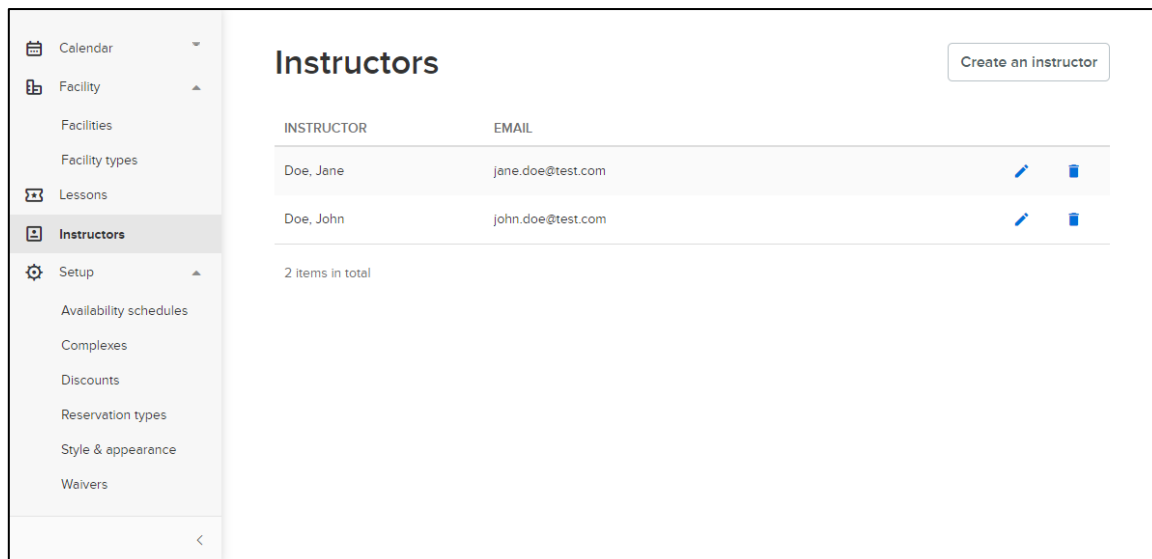
Lesson update rules are as follows:

- 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

A screenshot of the 'Create an instructor' form. The breadcrumb trail at the top reads 'Instructors > Create an instructor'. The form is divided into two sections: 'Basic information' and 'Online meeting setup'. The 'Basic information' section contains fields for 'First name *', 'Last name *', and 'Email *', each with a text input box. Below these is an 'Availability schedule' dropdown menu with 'Please select' as the current selection. The 'Online meeting setup' section contains four fields: 'Online lesson instructions' (with a placeholder 'E.g. "Please join us at the meeting URL below"'), 'Participants can join the online lesson at this URL' (with a placeholder 'https://'), 'Join by phone' (with an empty text box), and 'Online lesson ID' (with an empty text box). At the bottom right of the form are 'Cancel' and 'Save' buttons.

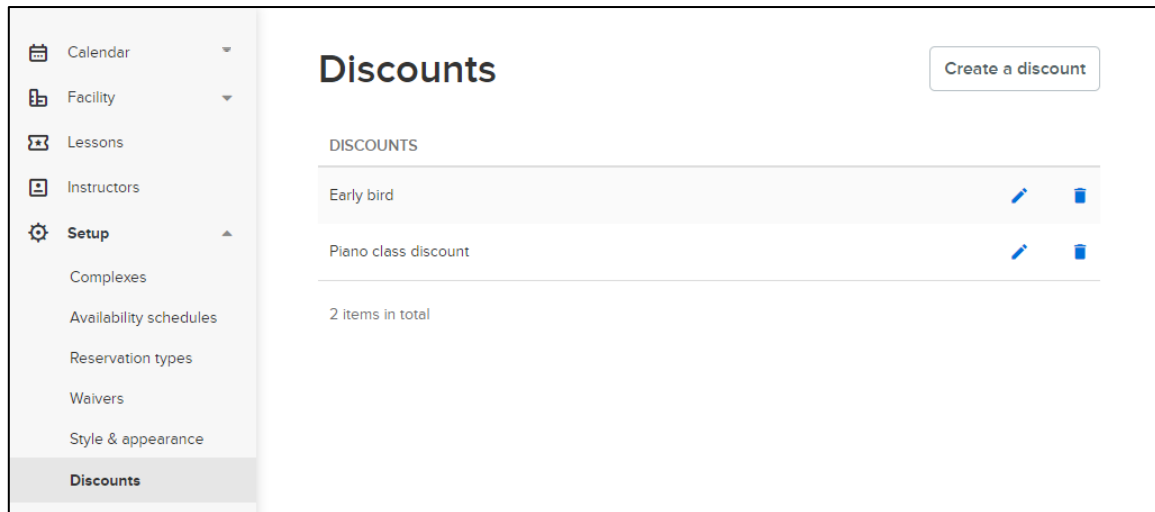
ACTIVE Reserve Release Notes

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:

The screenshot displays the 'Create a discount' form. The breadcrumb trail at the top reads 'Setup > Discounts > Create a discount'. The form is divided into two main sections: 'Basic information' and 'Discount rules'. In the 'Basic information' section, the 'Discount name' is set to 'Early bird', and 'Applicable lessons' shows '2 selected lessons' with an 'Edit lessons' link. The 'Discount rules' section includes 'Application order' set to 'Give benefit to my customer' and 'Give discount to' set to 'All items when the threshold is reached'. Below these are two discount tiers. The first tier is configured as: 'If there are 2 items in the order, give 10 % percent off'. The second tier is: 'If there are 3 items in the order, give \$ 20.00 dollars off'. At the bottom of the form are 'Cancel' and 'Save' buttons.

- 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. On the left is a sidebar with navigation links: Calendar, Facility, Lessons, Instructors, Setup (selected), Complexes, Availability schedules, Reservation types, Waivers, and Style & appearance. The main content area is titled 'Create a discount' and has a breadcrumb 'Setup > Discounts > Create a discount'. It is divided into two sections: 'Basic information' and 'Discount rules'. In 'Basic information', there is a 'Discount name' field with the value 'Early bird' and an 'Applicable lessons' button showing '2 selected lessons'. In 'Discount rules', there is a 'Select lessons' section with a search bar 'Search by lesson'. Below it is a table with two columns: 'LESSON' and 'DATE'. The table contains two rows: 'Beginner's French' with date '1/1/2020 - 12/31/2020' and 'Children's piano lessons' with date '1/1/2020 - 12/31/2020'. Both rows have a checked checkbox in the 'LESSON' column. A 'Save' button is in the top right corner.

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 sidebar is the same as in the previous screenshot, with 'Waivers' selected under the 'Setup' section. 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 table containing one row: 'Lorem ipsum'. To the right of this row are edit (✎) and delete (🗑) icons. Below the table, it says '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 sidebar is the same as in the previous screenshots, with 'Waivers' selected. The main content area is titled 'Create a waiver' and has a breadcrumb 'Setup > Waivers > Create a waiver'. It is divided into two sections: 'Basic information' and 'Waiver content'. In 'Basic information', there is a 'Waiver name' field with the value 'Lorem ipsum' and an 'Applicable lessons' button showing '2 selected lessons' and an 'Edit lessons' link. In 'Waiver content', there is a large text area with placeholder text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit. sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.' At the bottom right of the text area, it says '446/20000'. At the bottom of the form are 'Cancel' and 'Save' buttons.

ACTIVE Reserve Release Notes

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

Setup > Waivers > Create a waiver

Create a waiver

Basic information

Waiver name *

Applicable lessons 2 selected les

Waiver content *

Lorem ipsum dolor sit amet, consectetur adipiscing elit veniam, quis nostrud exercitation ullamco laboris nisi u velit esse cillum dolore eu fugiat nulla pariatur. Excepte est laborum.

Select lessons Save

Search by lesson

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

2 items in total

Waiver update rules are as follows:

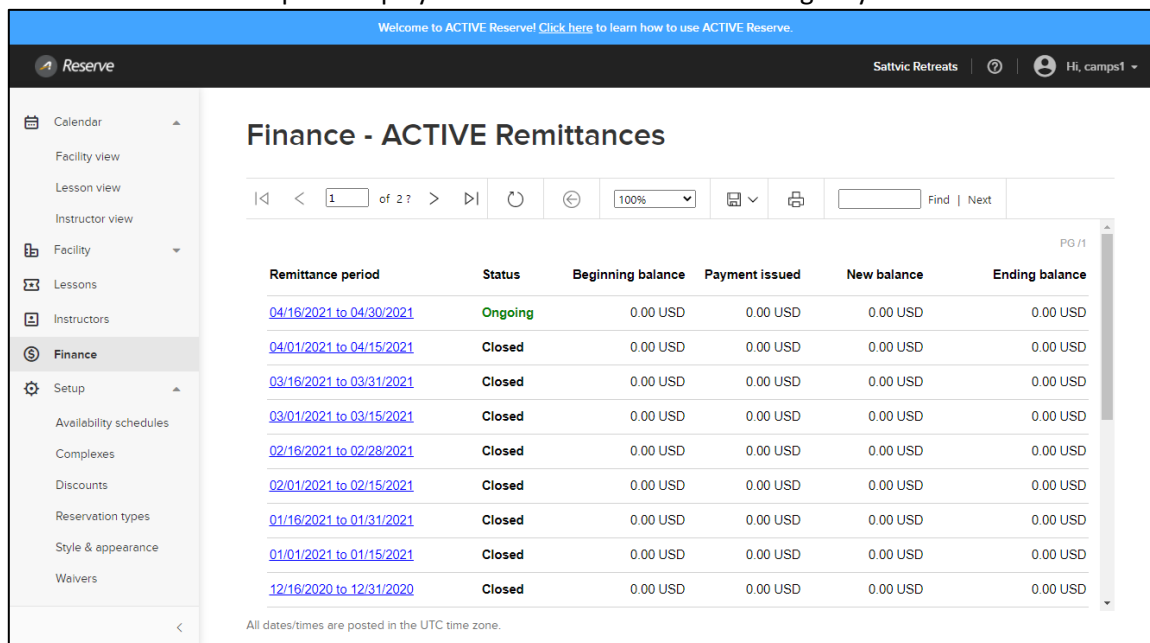
- Can edit (✎) or delete (🗑) before a waiver is signed by a consumer
- Cannot be deleted after waiver is signed by a consumer

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

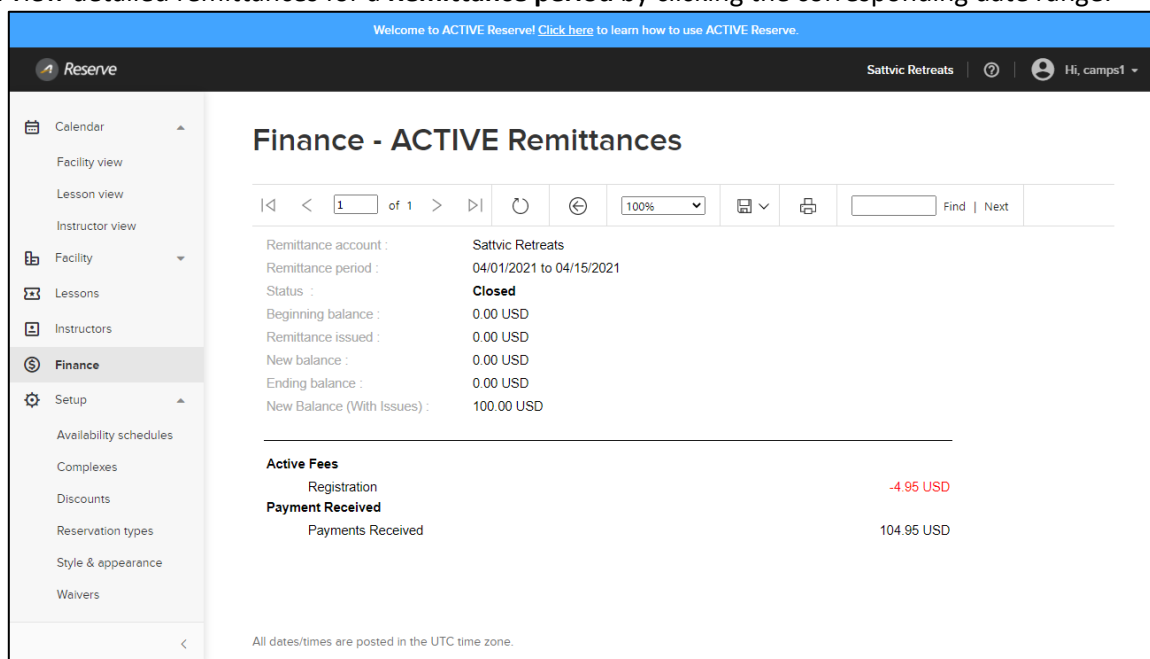
Finance - ACTIVE Remittances

1 of 2 ? | 100% | Find | Next

Remittance period	Status	Beginning balance	Payment issued	New balance	Ending balance
04/16/2021 to 04/30/2021	Ongoing	0.00 USD	0.00 USD	0.00 USD	0.00 USD
04/01/2021 to 04/15/2021	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
03/16/2021 to 03/31/2021	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
03/01/2021 to 03/15/2021	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
02/16/2021 to 02/28/2021	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
02/01/2021 to 02/15/2021	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
01/16/2021 to 01/31/2021	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
01/01/2021 to 01/15/2021	Closed	0.00 USD	0.00 USD	0.00 USD	0.00 USD
12/16/2020 to 12/31/2020	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 | 100% | Find | Next

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

Active Fees	
Registration	-4.95 USD
Payment Received	
Payments Received	104.95 USD

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