ACTIVE Reserve 3.7 Release Notes

Release Date	Tuesday, October 26th, 2021
Release Overview	Front desk registration workflow
Market/Strategic Goals	Product milestones and usability enhancements

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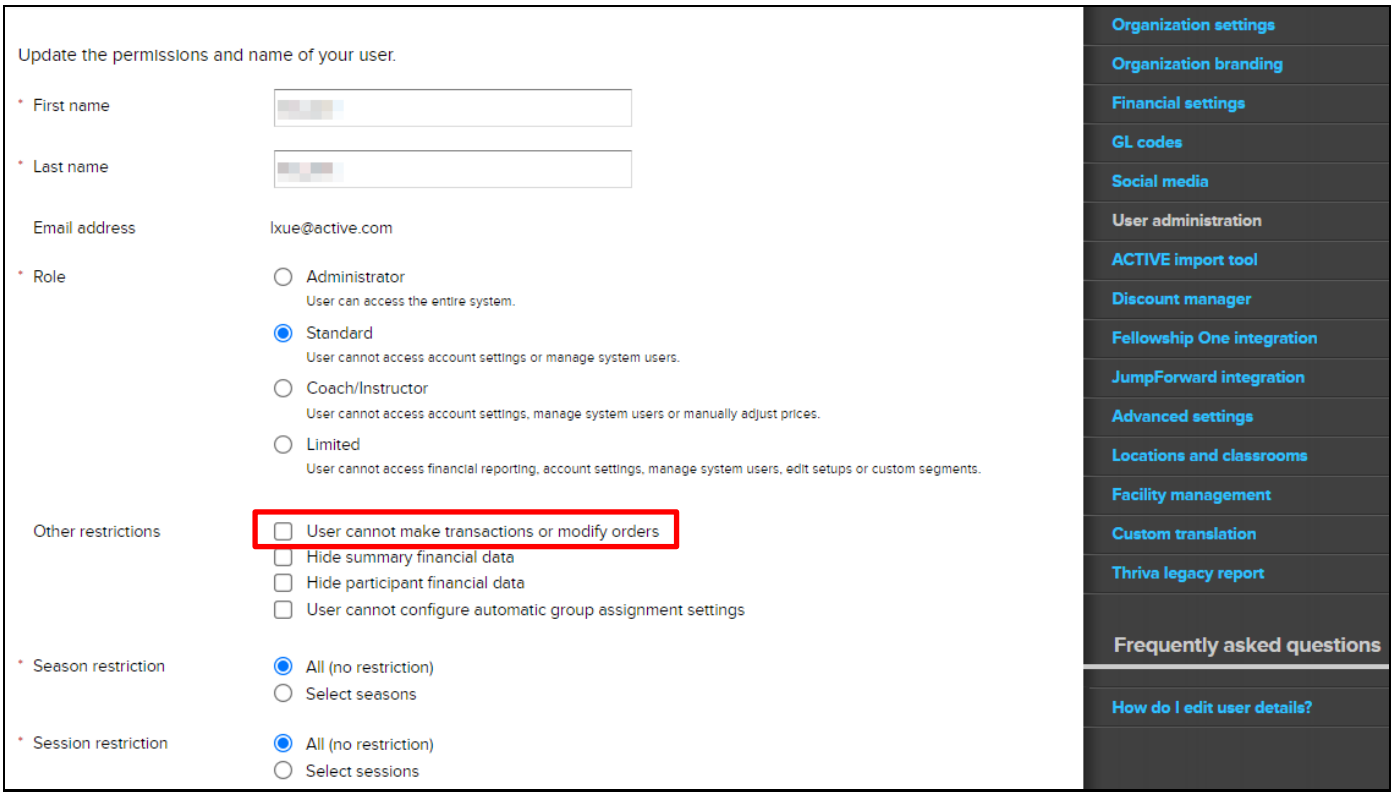
New features

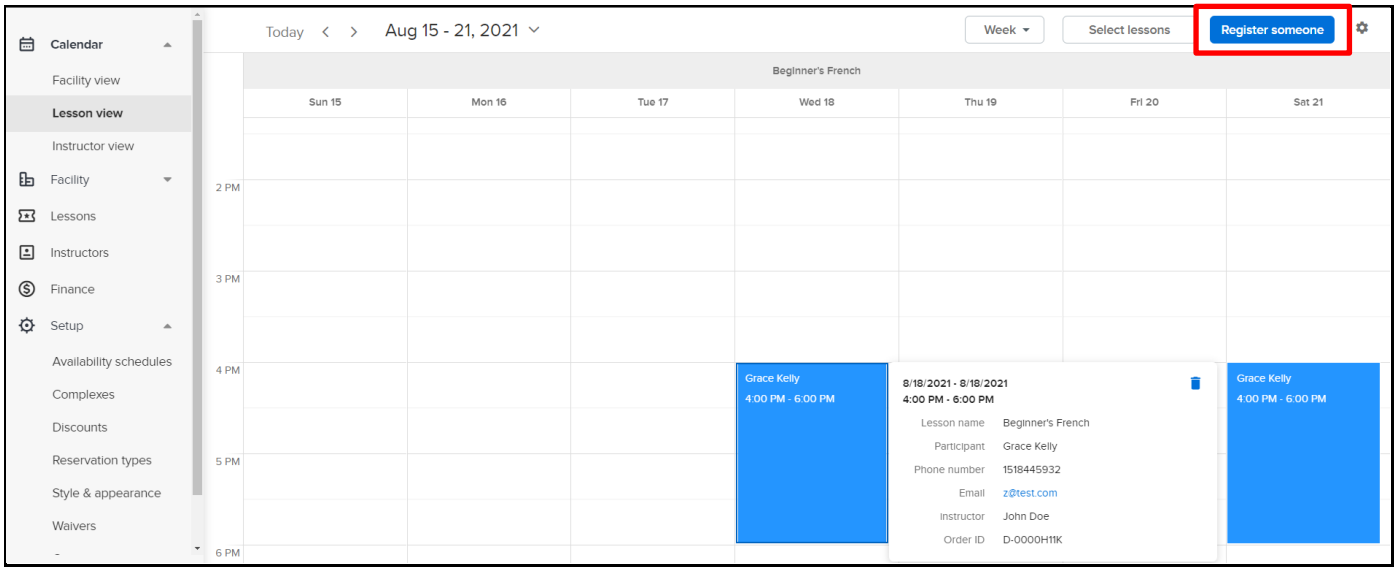
Front desk registration

Enable the front desk registration permission for an agency user

Agency owners and administrators can now allow an agency user to register participants by unselecting the **Settings** > **User administration** > **System users** > **Invite new user** or **Edit** a user > **Other restrictions** > **User cannot make transactions or modify orders** checkbox:

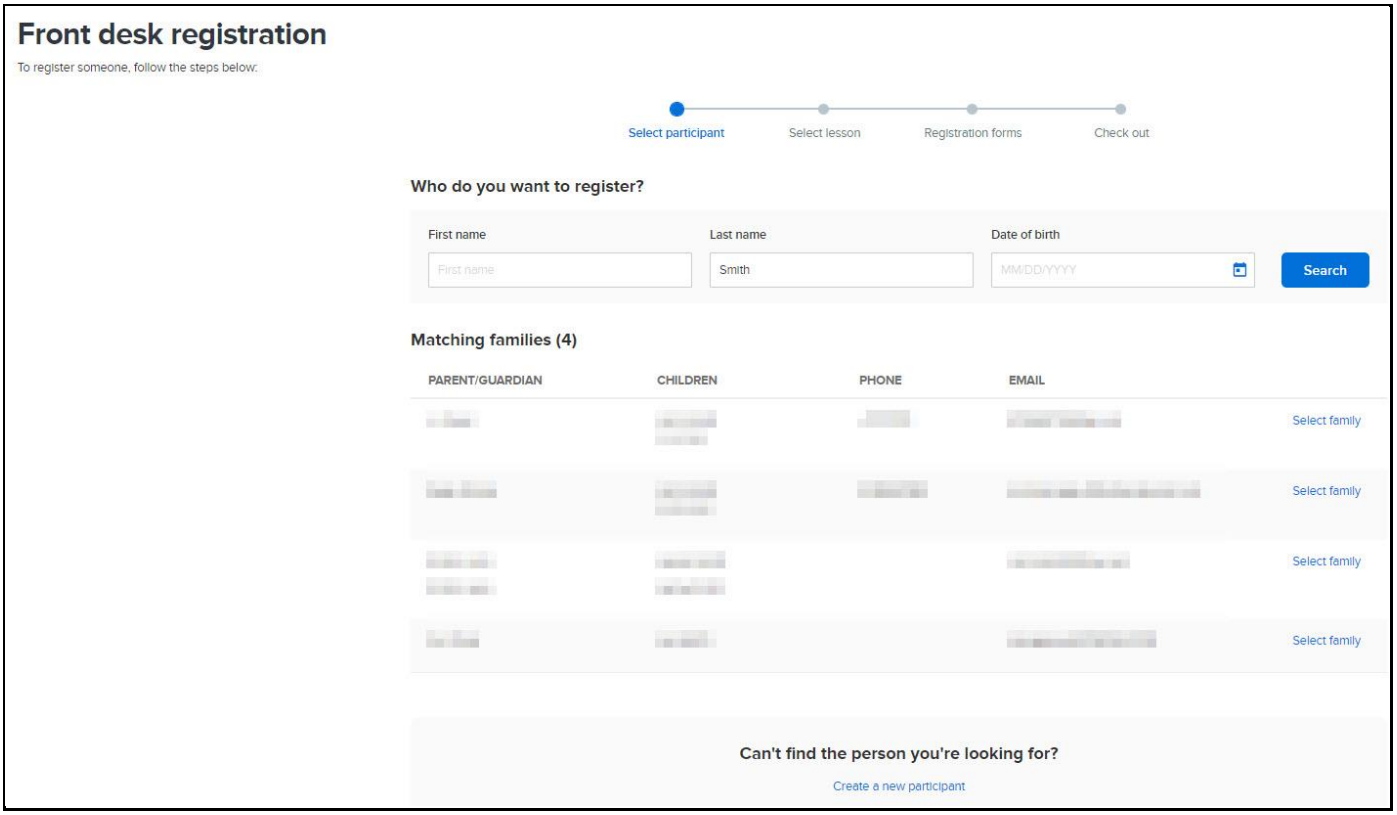


If the **User cannot make transactions or modify orders** checkbox is NOT selected, then the agency user can see and click the **Reserve** > **Calendar** > **Lesson view** or **Instructor view** > **Register someone** button:



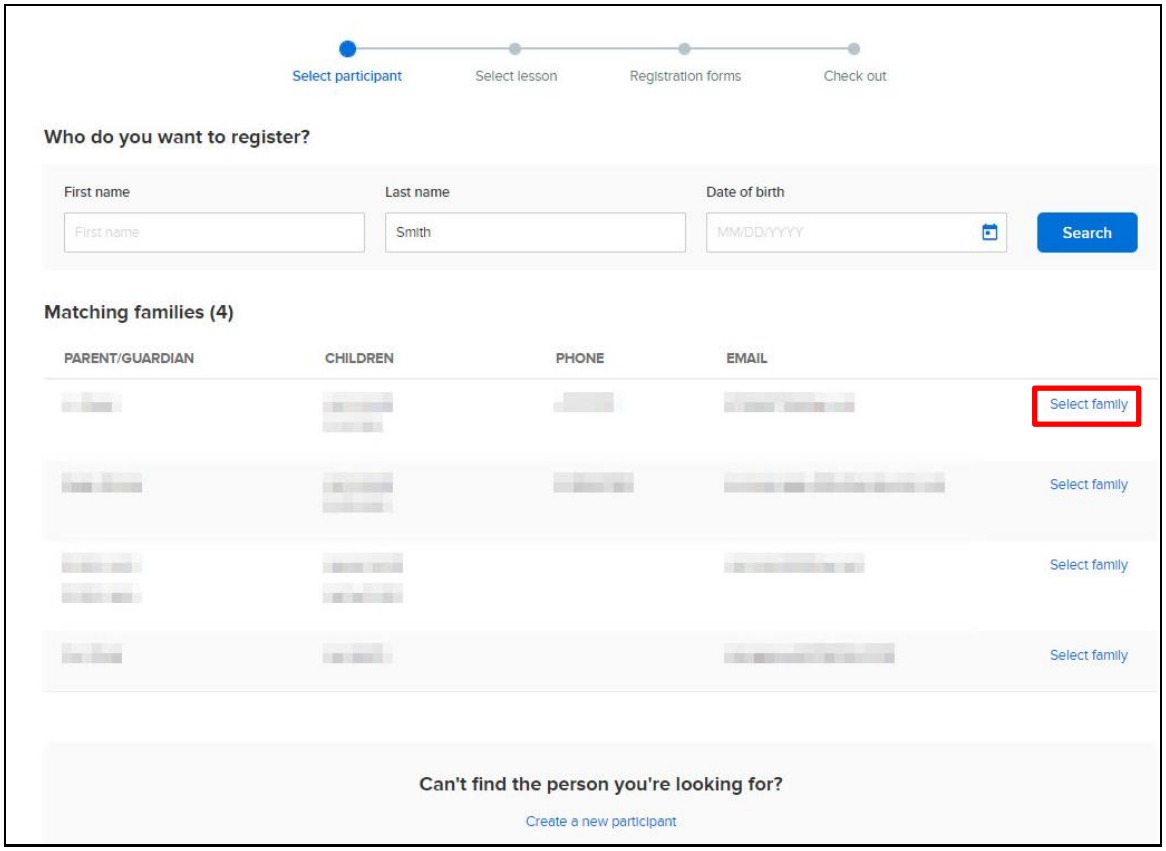
Select a participant

After clicking the **Register someone** button, the **Front desk registration** page appears. Agency users must first search for and select a participant by entering a **First name**, **Last name** or **Date of birth**:



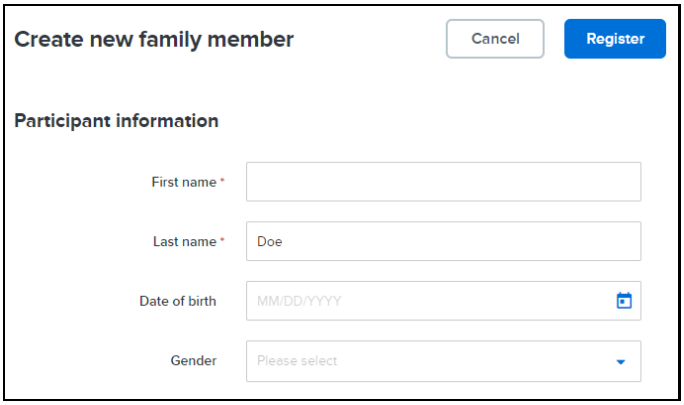
Register a participant in an existing family

If a matching family is found, then agency users can click the **Select family** link to open the **Register a participant from this family** page:



- To register an existing family member, select the required participant and click the **Register** button:

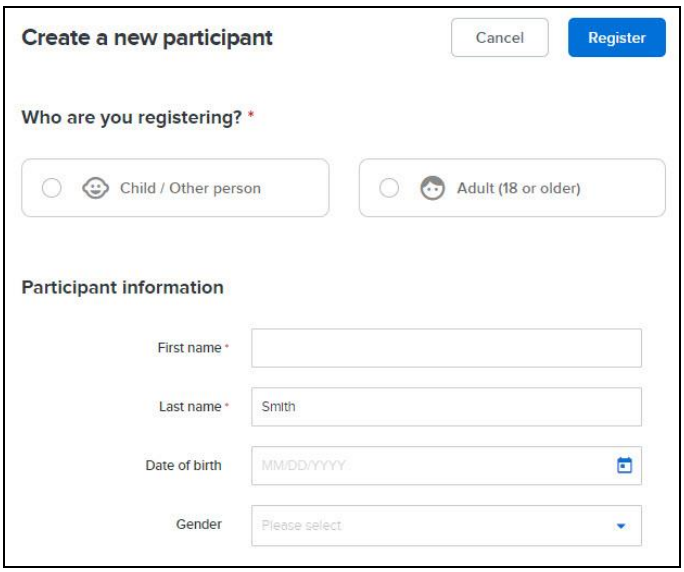
- To create a new participant in this family, click the **Create a new family member** link and then configure the participant's:
    - **First name** and **Last name**
    - **Date of birth** (optional)
    - **Gender** (optional)



Register a new participant

If a matching family does not exist, then agency users can click the **Create a new participant** link and select if they are registering for:

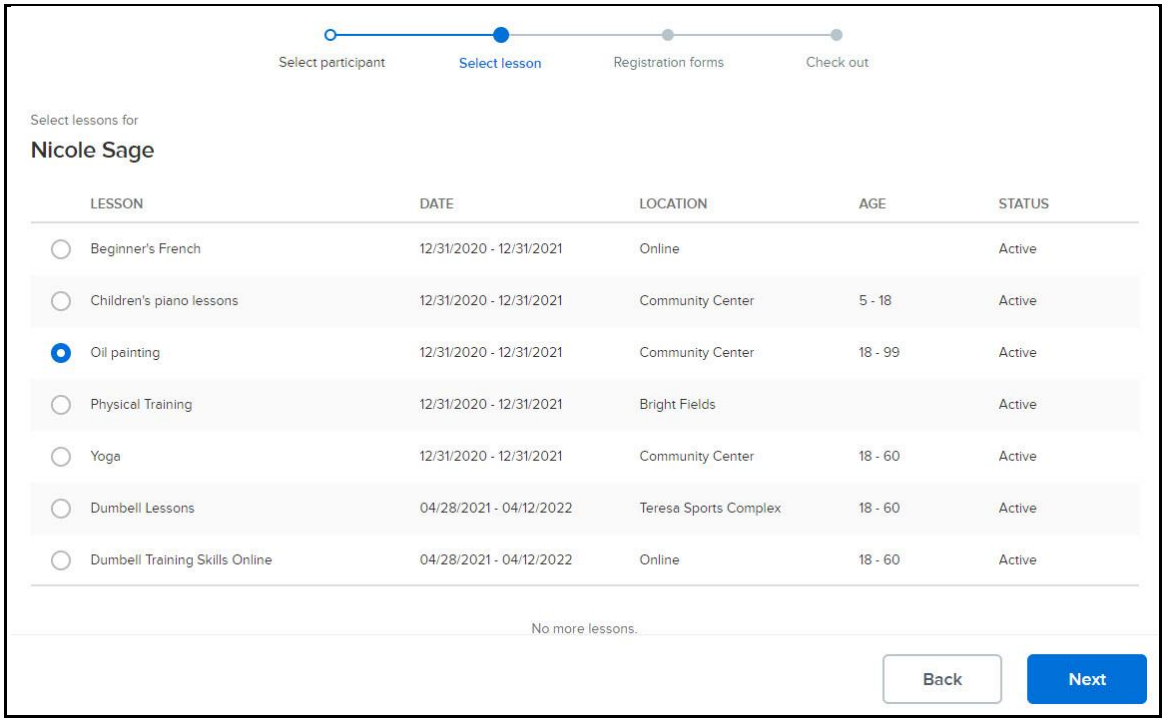
- a **Child / Other person** (guardian information will be collected later)
- an **Adult (18 or older)**



To continue the registration, click the **Register** button.

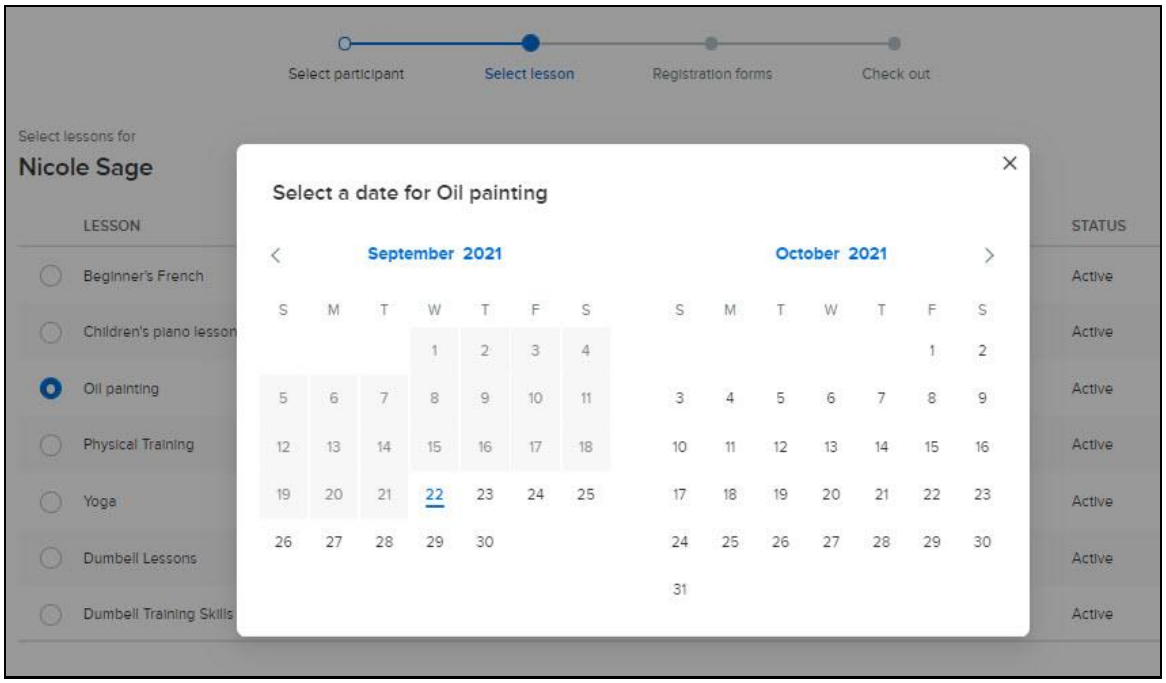
Select a lesson

Agency users can then select the required lesson:

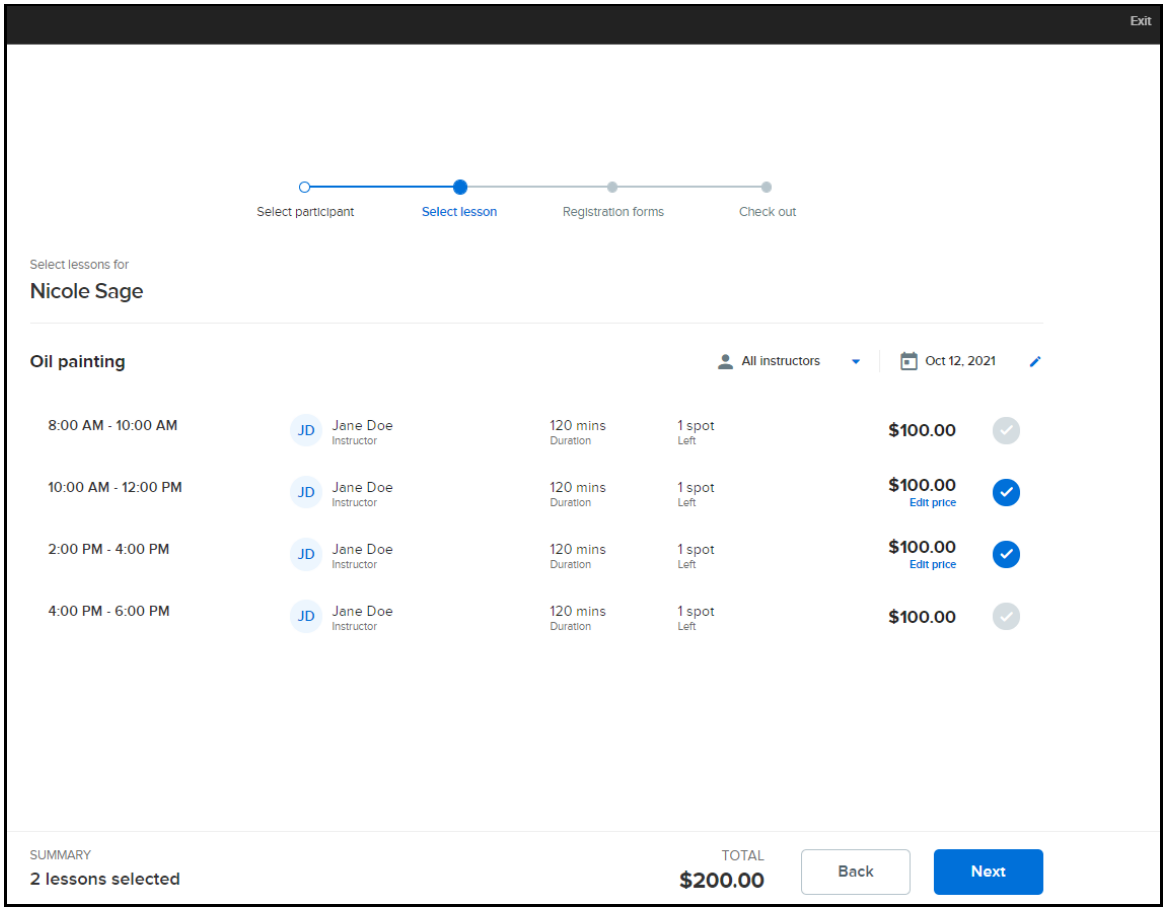


Then select a lesson date by clicking the **Next** button to register for:

- lessons on any date (including past or future dates), but NOT on a date without any timeslots.
- sold-out lessons.
- lessons before or after registration opens or closes.



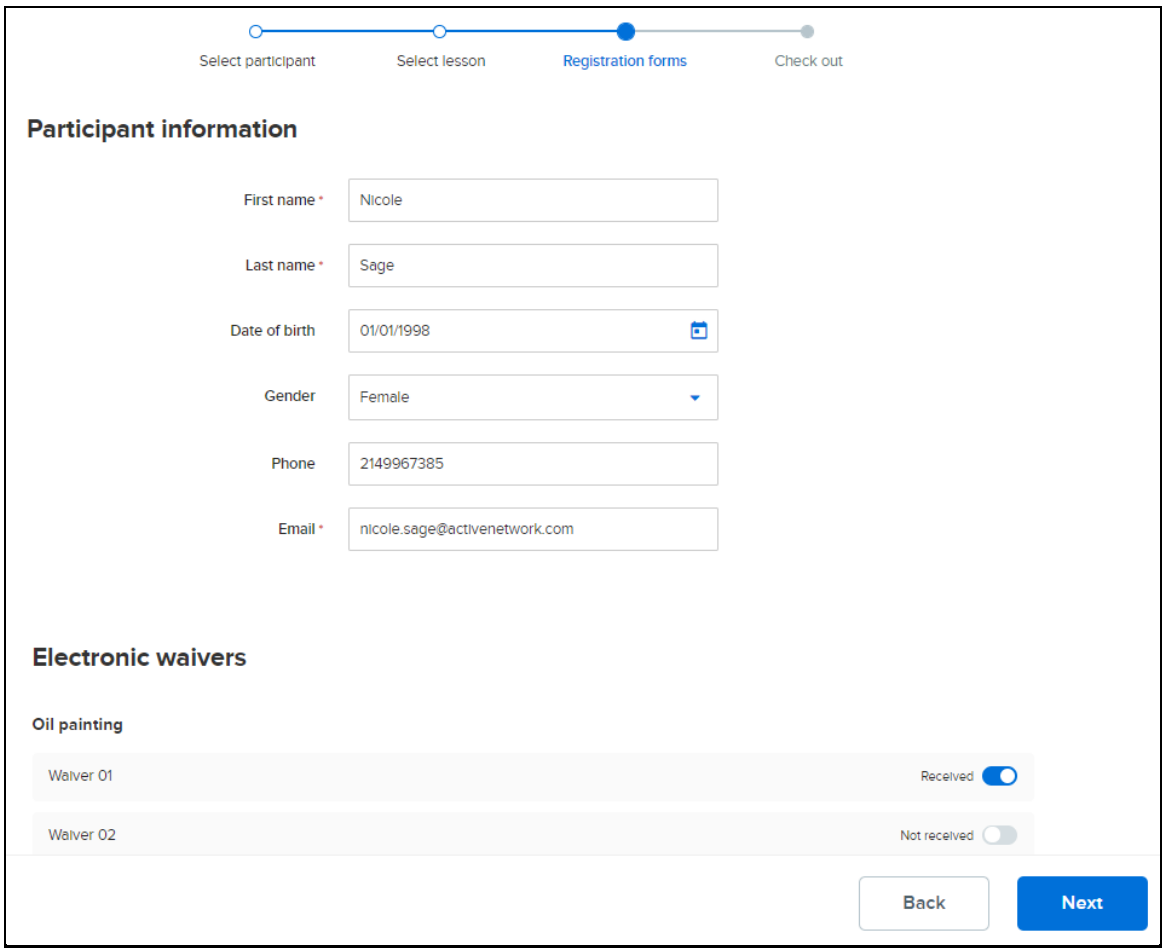
Then select the required timeslots (up to 120 timeslots can be selected):



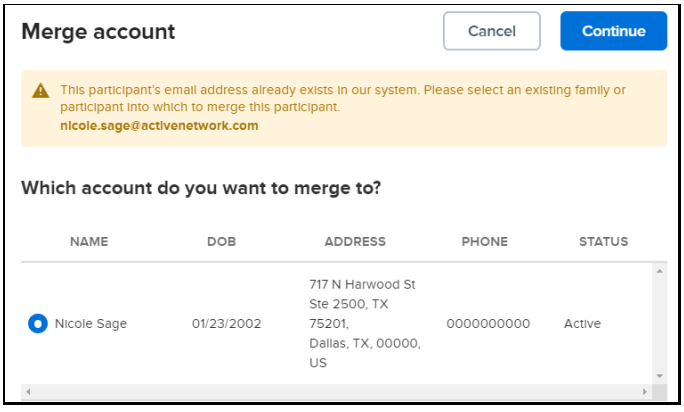
- If the instructors for the selected lesson and date are available, then the instructor filter (defaults to **All instructors**) is displayed, and the available lessons can be filtered by the selected instructors.
- To continue the registration, click the **Next** button.
- To charge the lesson at a price above the standard price, click the **Edit price** link.
- To change the booking date, click the ✎ icon.
- If a lesson has no available spots, then agency users can still oversell the lesson.
- To change the participant or lesson, click the **Back** button (changing the participant or lesson will clear the current registration information).
- To exit the registration, click the **Exit** button (exiting the registration will clear the current registration information).

Registration forms

Agency users can then review (and edit if necessary) the participant's information and mark any waivers which have already been received from the participant:

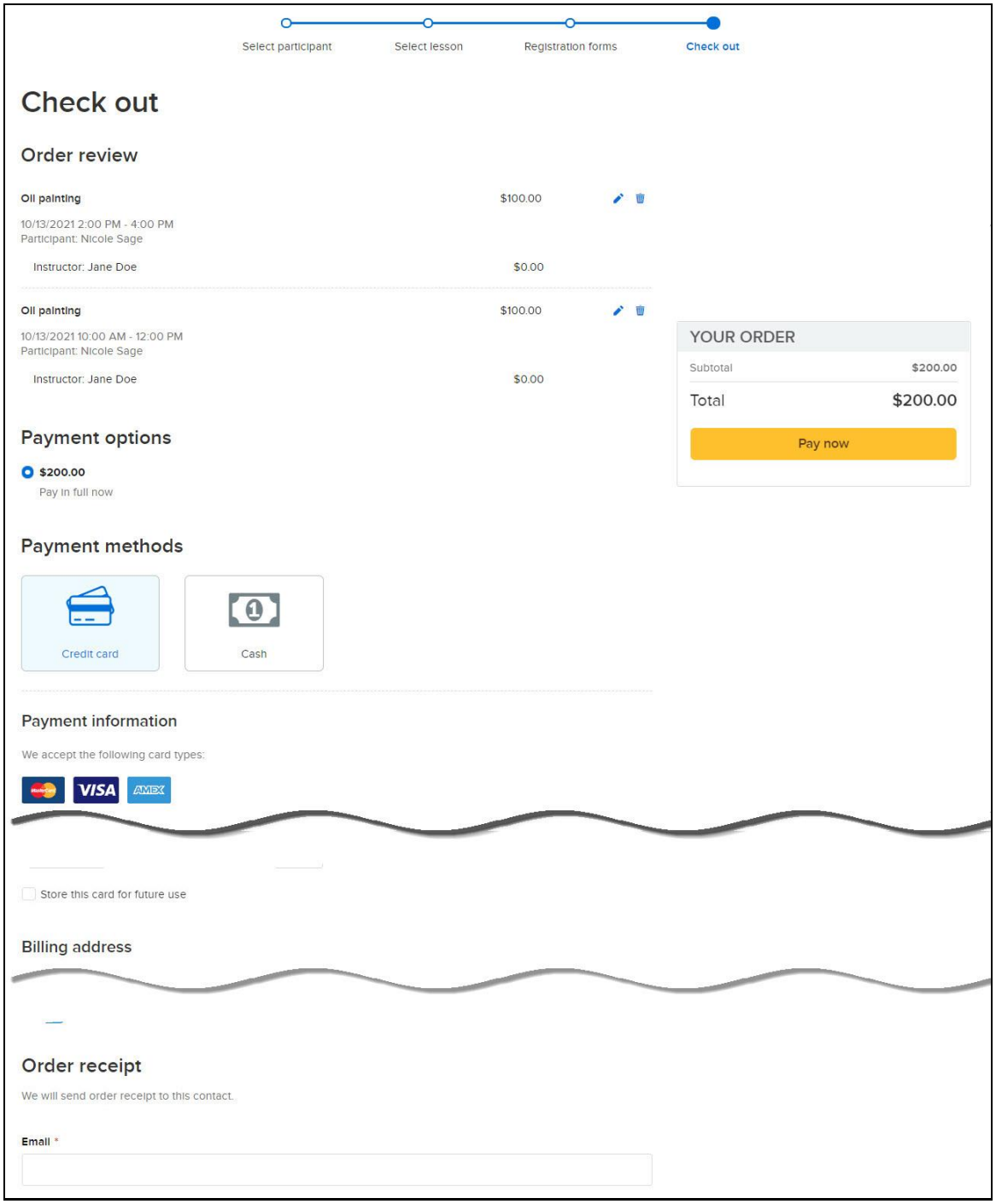


- To continue the registration, click the **Next** button.
- To re-select the timeslots or lesson date, click the **Back** button.
- If the participant's email address already exists in our system, then the agency user can select to:
    - add this participant to an existing family by creating a new family member.
    - merge this participant into an existing participant.



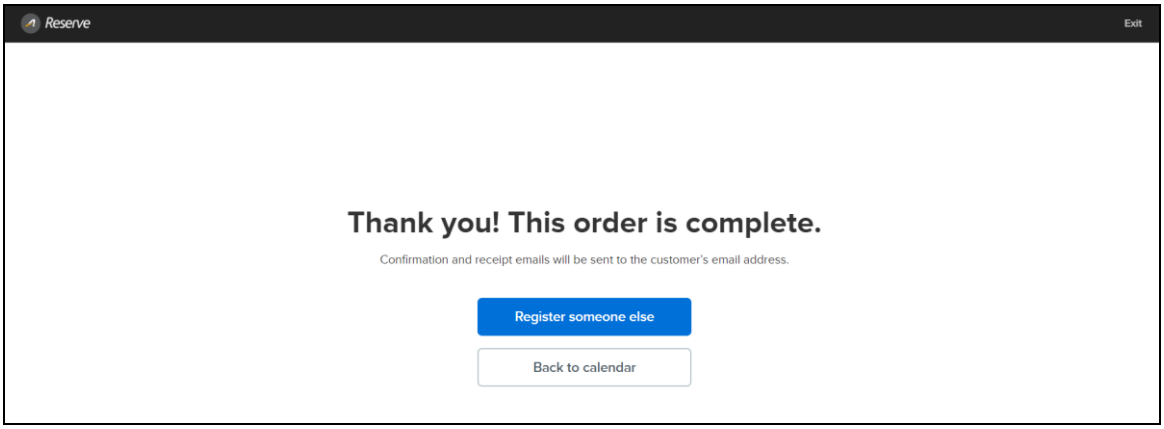
Check out

After completing the registration forms and collecting any agreements or waivers, agency users can then review the order summary and collect credit card information or cash payment to complete the order:



Agency users can:

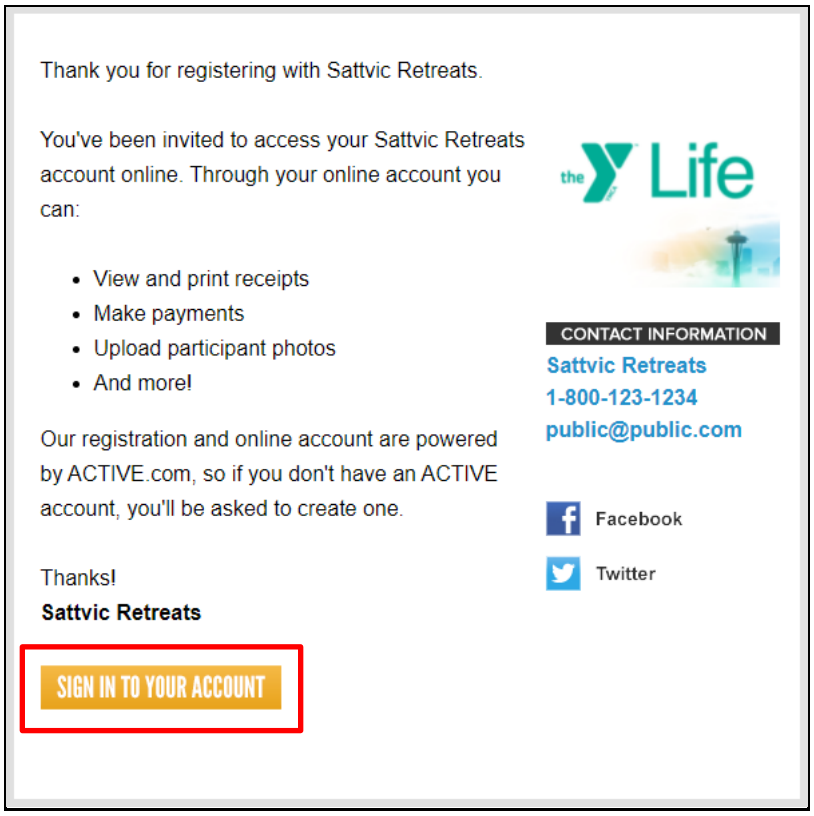
- Change a timeslot by clicking the ✎ icon.
- Remove a timeslot by clicking the 🗑 icon (removing all timeslots will direct agency users back to the lesson selection page).
- View discount information if applicable.
- Enter payment and billing information.
- Select to store the credit card information for future use.
- Enter the email address to which to send the order receipt.
- Complete the order by clicking the **Pay now** button.

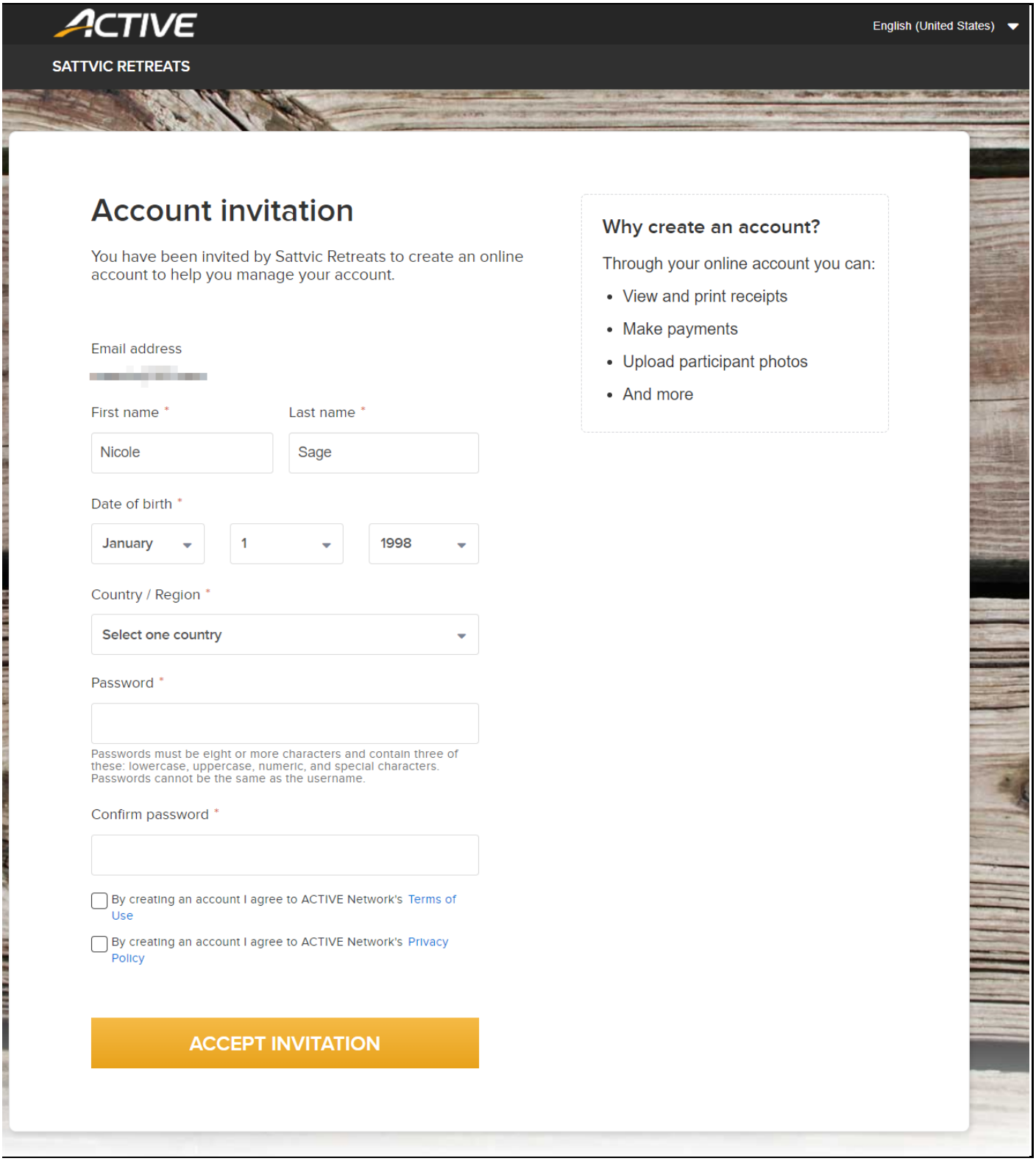


Confirmation and receipt emails are then sent to the customer, and Blind Carbon Copied (BCC) to the relevant instructors.

ACTIVE Passport account invitation

If a newly created participant is an adult, then an ACTIVE Passport account invitation email is sent to the participant. If the participant is a minor in a new family, then the email is sent to the participant's parent. To accept and activate the ACTIVE Passport account, the recipient can click the **SIGN IN TO YOUR ACCOUNT** button in the invitation email to open the SSUI page:




ACTIVE
English (United States)
SATTVIC RETREATS
Account invitation
You have been invited by Sattvic Retreats to create an online account to help you manage your account.
Email address
First name *
Last name *
Nicole
Sage
Date of birth *
January
1
1998
Country / Region *
Select one country
Password *
Passwords must be eight or more characters and contain three of these: lowercase, uppercase, numeric, and special characters. Passwords cannot be the same as the username.
Confirm password *
By creating an account I agree to ACTIVE Network's Terms of Use
By creating an account I agree to ACTIVE Network's Privacy Policy
ACCEPT INVITATION
Why create an account?
Through your online account you can:
View and print receipts
Make payments
Upload participant photos
And more