



# ACTIVE Reserve 4.2 Release Notes

---

Release Date

Wednesday, February 16<sup>th</sup>, 2022

Release Overview

User administration

Configure financial settings

Market/Strategic Goals

Product milestones and usability enhancements

# ACTIVE Reserve Release Notes

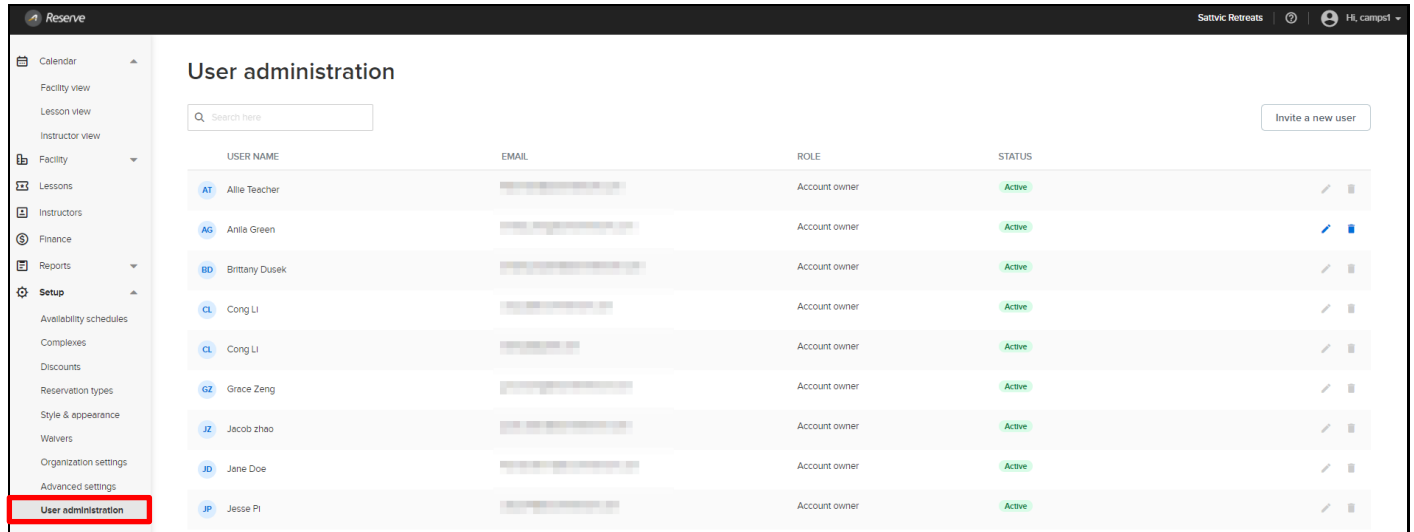
## Contents

- New features ..... 3**
  - User administration ..... 3
    - Invite a user..... 3
    - Edit a user ..... 4
    - Delete a user ..... 5
    - Permission management ..... 6
  - Configure financial settings..... 7

## New features

### User administration

Agency users with the **Account Owner** role can view and manage ACTIVE Reserve users by clicking **Setup > User administration**:



To search for a user, enter a name or an email address in the search box.

In the **STATUS** column:

- **Invited** indicates that a user has already been sent an invitation email, but the user has not yet accepted the invitation. To resend an invitation email, click **Resend invitation**.
- **Active** indicates that a user has already accepted the invitation and can access ACTIVE Reserve.

### Invite a user

To invite a new user:

1. Click **Invite a new user**.
2. Enter the required user information.
3. Select a **Role** (for more information about roles, see the **Permission management** section).
4. Click **Send invitation** to email an invitation to the new user.

# ACTIVE Reserve Release Notes

Setup > Users > Invite a new user

## Invite a new user

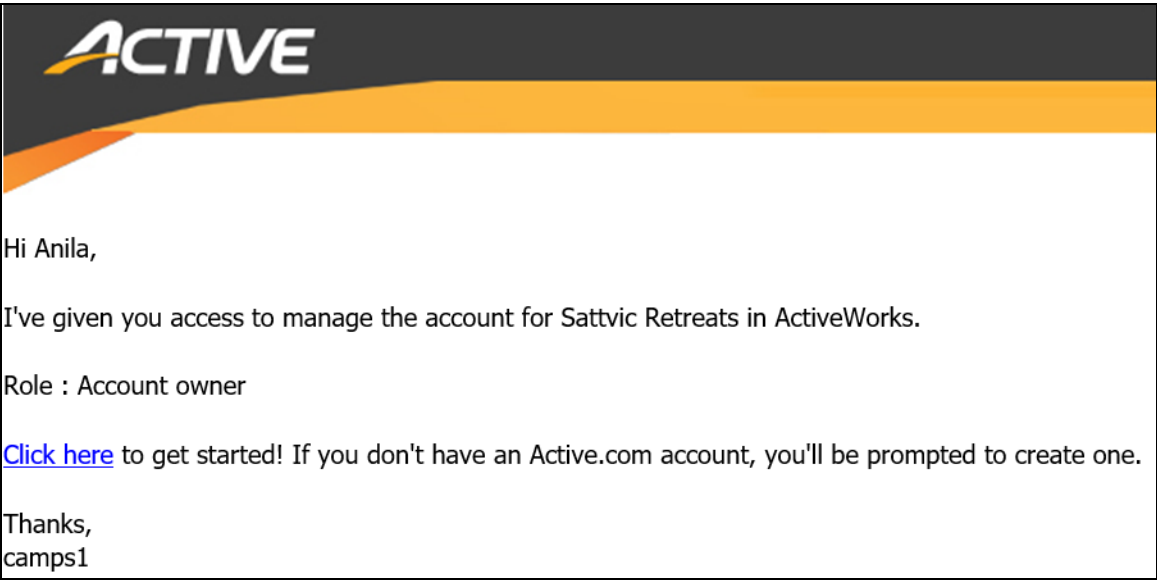
First name \* Anila

Last name \* Green


Email \*

Confirm email \*

Role \* Account owner



### Edit a user

To edit a user, click the corresponding  icon:

- Users cannot edit themselves.
- Users in the **Invited** status are not editable.
- Users invited from the back office are not editable in the AUI.
- User's email address is not editable.

# ACTIVE Reserve Release Notes

Satvic Retreats | Hi, campst

### User administration

Q Search here Invite a new user

USER NAME	EMAIL	ROLE	STATUS	
AT Allie Teacher	[REDACTED]	Account owner	Active	✎
AG Anila Green	[REDACTED]	Account owner	Active	✎
BD Brittany Dusek	[REDACTED]	Account owner	Active	✎
CL Cong Li	[REDACTED]	Account owner	Active	✎
CL Cong Li	[REDACTED]	Account owner	Active	✎
GZ Grace Zeng	[REDACTED]	Account owner	Active	✎
JZ Jacob zhao	[REDACTED]	Account owner	Active	✎
JD Jenie Doe	[REDACTED]	Account owner	Active	✎
JP Jesse Pi	[REDACTED]	Account owner	Active	✎

Setup > Users > Edit an user

### Edit an user

First name \*

Last name \*

Email

Role \*

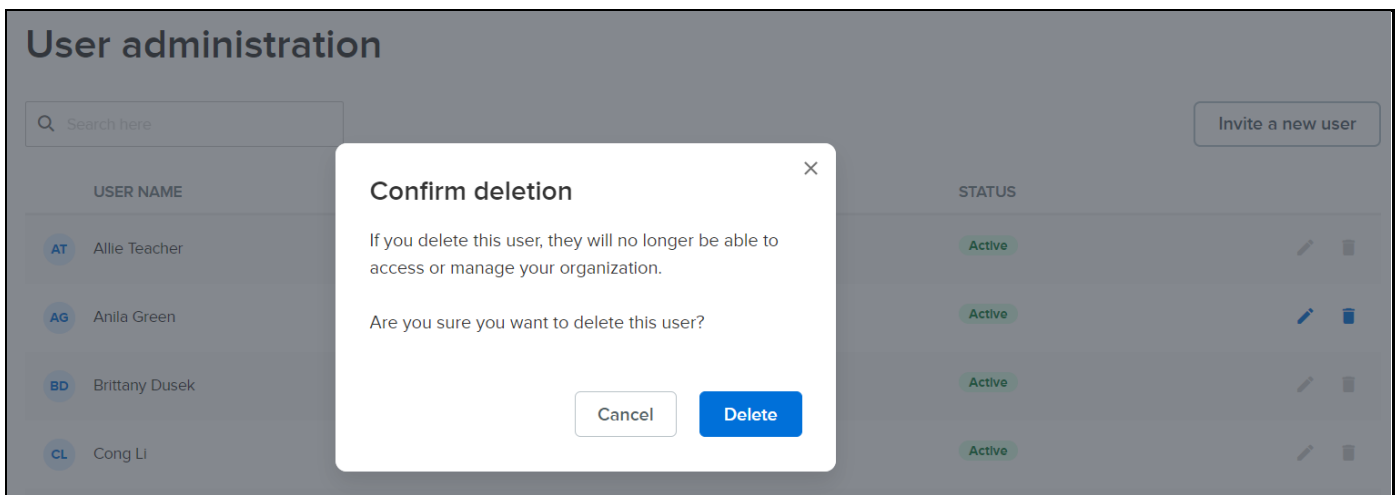
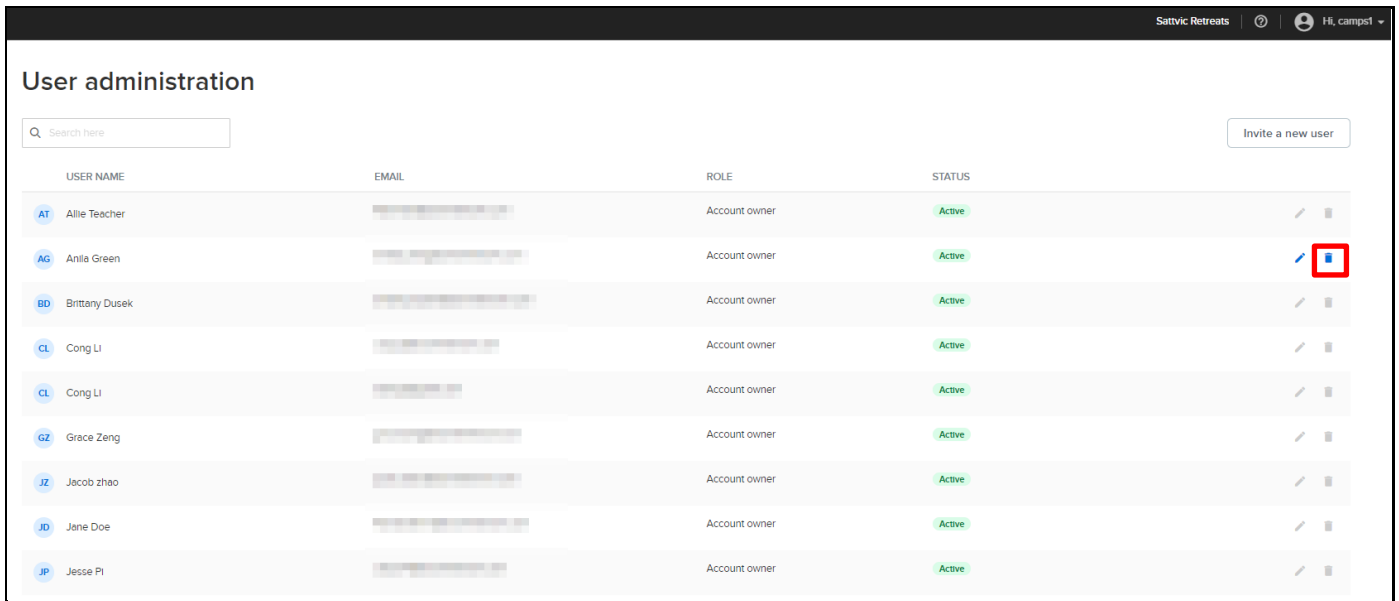
Cancel Save

### Delete a user

To delete a user, click the corresponding  icon:

- Users cannot delete themselves.
- Users invited from the back office cannot be deleted in the AUI.

# ACTIVE Reserve Release Notes



## Permission management

Users with a specific role have the following permissions:

Permission		Role		
		Account Owner	System Manager	Limited Staff
User Administration	User Administration	✓		
Financial Reports	View Remittance Report	✓	✓	
	View Other reports	✓	✓	
Setup	Edit Advanced settings			
	Edit Availability Schedules	✓	✓	✓
	Edit Complexes	✓	✓	✓
	Edit Discounts	✓	✓	✓
	Edit Waiver	✓	✓	✓
	Edit Style & Appearance	✓	✓	✓
Private Booking	Edit Lessons	✓	✓	✓

## ACTIVE Reserve Release Notes

	Edit Instructors	✓	✓	✓
	Edit Private Booking Reservation	✓	✓	✓
Facility	Manage Facilities	✓	✓	✓
	Edit Facility Reservation	✓	✓	✓

### Configure financial settings

In the **Setup > Organization settings > Financial settings** tab, account owners can now configure how:

- ACTIVE Network sends them payments.
- Their organization receives payments from participants.

**Note:** if account owners have not yet successfully validated an ACH (Direct deposit) account, then they cannot configure any other ACTIVE Reserve settings. Before they can set up ACTIVE Reserve, account owners must first successfully validate their ACH account.

#### Organization settings

Contact information **Financial settings** Terminology

---

**How Active Network sends you payments for Reserve**  
Reserve payments will be remitted to you by the method indicated below.

Issue payment as: **ACH (Direct deposit)**

**ACH (Direct deposit)**  
Two small deposits will be made to this account in the next 3 to 5 business days. Confirm the account by returning to this page and entering the amounts of those deposits.

bank of US Deposit pending

Account ending in  

Once the direct deposit has been validated these changes will take effect after the first payment cycle.

**Remittance payment address**  
This address is used by ACTIVE Network to issue you an ACH payment.

---

**How you accept payment from participants**  
Funds are processed in the currency indicated below.

Accepted currency: USD

Name appearing on credit card statement:

Accepted payment methods	TYPE	OFFLINE	ONLINE
Visa		✓	✓
MasterCard		✓	✓
American Express	<input checked="" type="checkbox"/>		<input type="checkbox"/>
Discover	<input type="checkbox"/>		<input type="checkbox"/>
Cash		✓	

Processing fees should be paid by:  Fees should be passed on to my customers  
 Should be absorbed by my organization

Which option should I choose?  
Credit card processing fees are always paid by your organization

### In How ACTIVE Network sends you payments for Reserve:

- Enter the organization's bank details or edit the bank details by clicking the icon, and then validate the account by entering the two deposit validation test amounts remitted to the account.

## ACTIVE Reserve Release Notes

- If the validation of the two test amounts fails 5 times, then the account owners must enter a different bank account at which to receive payments from ACTIVE Network.

### How ACTIVE Network sends you payments for Reserve

Reserve payment will be remitted to you twice monthly monthly by the method indicated below.

\* Account name

Issue payment as

#### ACH (Direct deposit)

Two small deposits will be made to this account in the next 3 to 5 business days. Confirm the account by returning to this area and entering the amounts of those deposits. ?

\* Bank name

\* Routing number

\* Account number

\* Confirm account number

## Organization settings

Contact information **Financial settings** Terminology

### How Active Network sends you payments for Reserve

Reserve payments will be remitted to you by the method indicated below.

Issue payment as

#### ACH (Direct deposit)

Two small deposits will be made to this account in the next 3 to 5 business days. Confirm the account by returning to this page and entering the amounts of those deposits. ?

**⚠ Your last validation attempt was unsuccessful, please re-enter the validation amounts. If you fail the validation 5 times, you must re-enter your bank information.**

asd  
Account ending in 1156 Validation incomplete

Fill in the deposit amounts to validate direct deposit set-up

Once the direct deposit has been validated these changes will take effect after the first payment cycle.

### In How you accept payment from participants:

- Edit the **Name appearing on credit card statements** which should be the organization's name or the name of the individual that will receive money on the organization's behalf. After participants pay online, to help them identify the source of the charge, their credit card statements will display this **Name appearing on credit card statements**.
- Select the **Accepted payment methods**.
- Select by whom ACTIVE processing fees should be paid.

# ACTIVE Reserve Release Notes

**How you accept payment from participants**  
Funds are processed in the currency indicated below.

Accepted currency: USD

Name appearing on credit card statement:

Accepted payment methods	TYPE	OFFLINE	ONLINE
Visa		✓	✓
MasterCard		✓	✓
American Express		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Discover		<input type="checkbox"/>	<input type="checkbox"/>
Cash		✓	

Processing fees should be paid by  Fees should be passed on to my customers  
 Should be absorbed by my organization

[Which option should I choose?](#)

Credit card processing fees are always paid by your organization