



ACTIVE Reserve 4.10 Release Notes

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|------------------------|---|
| Release Date | November 24 th , 2022 |
| Release Overview | Custom registration forms |
| Market/Strategic Goals | Product milestones and usability enhancements |
| Target Customers | Lite and Plus Customers |

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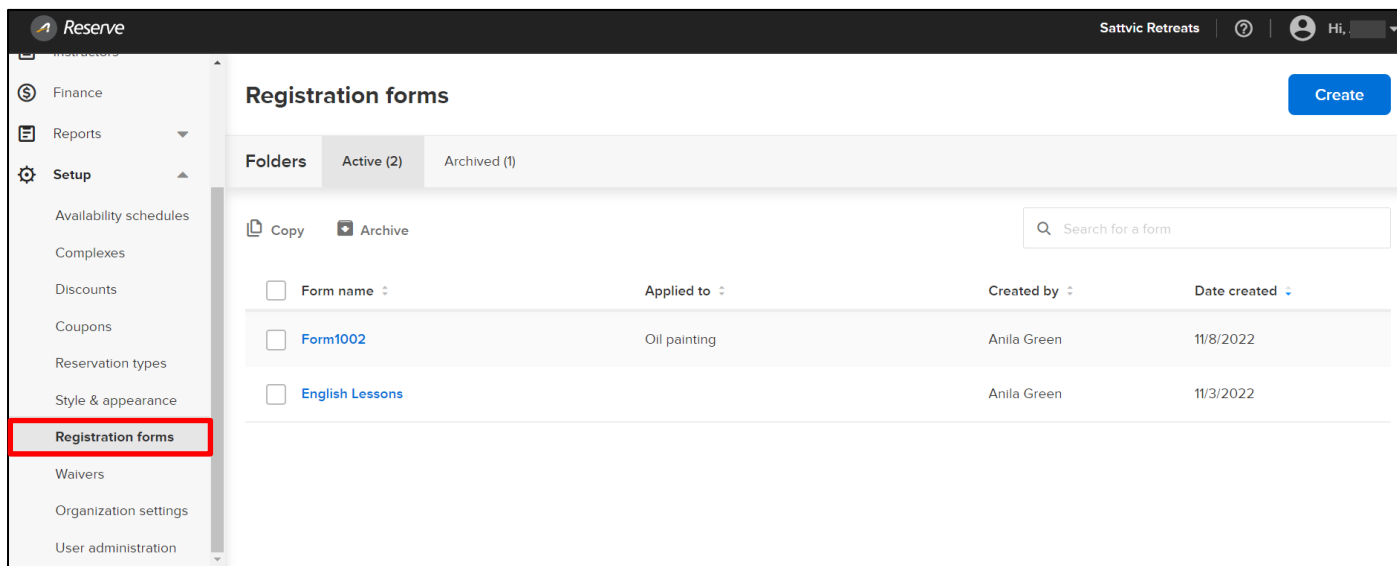
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New features

Custom registration forms

To collect participant's information when registering for a lesson, agency users (with the account owner, limited staff or system manager role) can now **Create** and customize registration forms in the **Setup > Registration forms** tab:



Create a registration form

To create a new registration form, in the **Registration forms** tab:

1. Click the **Create** button.
2. Enter a unique **Form name** and click **Next**:

Create form

Form name * 0/255

Cancel Next

3. In the **Digital Form Builder > FORM DESIGN** step, drag-and-drop fields as required from the **Fields** tab to the form:

Note: You do NOT need to create questions to collect mandatory information, e.g., participants' name or date of birth. For a list of mandatory information that will be collected in registration steps prior to this **Registration form**, see [Appendix: Mandatory information in the registration flow](#).

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The screenshot shows the 'Digital Form Builder' interface. At the top, it says 'Form1002' and 'Version:1 Updated on Nov 9, 2022 13:42'. Below the header, there are two tabs: 'FORM DESIGN' (active) and 'PREVIEW & TEST'. On the right, there is a 'Show Grid' toggle and a 'Next' button. The left sidebar has two sections: 'Fields' and 'Properties'. Under 'Fields', there is a search bar and a list of 'Generic fields' including Short answer, Long answer, Multiple selection, Single selection, Date, Time, Text, Signature, and Address. The main area shows a form layout with a grid of blue squares. A message at the top of the main area states: 'The following fields will be included on every registration form and do not require creation on this page: Participant Name, Date of Birth, Email, and Phone Number. [More details](#)'. Below this, there are four fields: 'Short answer', 'Long answer', 'Date' (with a calendar icon), and 'Time' (with a clock icon). At the bottom, there is a dashed line and the text 'Drag and drop any field here to create a new field'.

- To edit a question's properties, click the question field and then configure its properties in the **Properties** tab:

The screenshot shows the 'Digital Form Builder' interface in the 'Properties' tab. The left sidebar now has the 'Properties' tab selected. Under 'Properties', there is a 'Long answer' field selected, and a 'General' section with fields for 'Question / Label' (containing 'Long answer'), 'Help text', and 'Required field' (with a toggle switch). The main area shows the same form layout as before, but the 'Long answer' field is highlighted with a blue dashed border, indicating it is selected for editing. The 'Short answer', 'Date', and 'Time' fields are still visible below it. The 'Drag and drop any field here to create a new field' text is also present at the bottom.

- After configuring all the questions, click **Next**.
- In the **PREVIEW & TEST** step, preview the form in desktop (🖥️), tablet (📱) or mobile phone (📱) modes and test the form by clicking **Submit**:

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The screenshot shows the 'Digital Form Builder' interface. At the top, it says 'Form1002' and 'Version:1 Updated on Nov 9, 2022 13:42'. Below this, there's a navigation bar with 'FORM DESIGN' and 'PREVIEW & TEST'. The main area displays a form with the following fields: 'Short answer' (a single-line text box), 'Long answer' (a multi-line text box), 'Date' (a date picker showing 'MM/DD/YYYY'), and 'Time' (a time picker showing '00:00:0000'). A blue 'Submit' button is at the bottom center. On the right side, there are 'Back' and 'Publish' buttons. At the bottom right, there's a 'View as' dropdown menu set to 'Admin' and icons for desktop, tablet, and mobile views.

7. To save the form, click **Publish**.

Agency users can also create a registration form by selecting an existing form and clicking **Copy**.

Apply a registration form to a lesson

To apply a registration form to a lesson, on the **Lessons > Create a lesson** or edit (✎) a lesson page, search for a form by clicking the **Registration form > +** icon and then select a form (only published forms can be selected to collect the consumer's information):

The screenshot shows the 'Lessons > Create a lesson' page. The title 'Create a lesson' is at the top. Below it, there are several form fields: 'Lesson name *' (a text box), 'Lesson description *' (a text box), 'Display status *' (a dropdown menu set to 'Online'), and 'Description' (a text box). A red box highlights the 'Registration form' button with a blue plus icon (+).

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The screenshot shows the ACTIVE Reserve interface. On the left, a sidebar contains fields for 'Registration close date', 'Age', 'Registration form', 'Display status', and 'Description'. The 'Registration form' field has a plus icon. On the right, a 'Select form' modal is open, featuring a search bar and a list of forms: 'English Lessons' and 'Form1002'. A 'Save' button is in the top right corner of the modal.

To change the registration form, click **Edit**.

This screenshot shows the registration form details. The 'Registration close date' is set to 'MM/DD/YYYY' with a calendar icon. Below it, it says 'Registration will close at 11:59 PM on this day'. The 'Age' section has 'No restrictions' selected. The 'Registration form' section shows 'Registration form1' with a close icon and an 'Edit' button with a pencil icon. The 'Display status' is set to 'Online'.


Consumers complete a registration form

For a lesson configured with a registration form, on the registration page, consumers can complete the form:

The screenshot shows the ACTIVE registration page for '2023 Dancing Club'. The page includes a calendar for October 2022, showing classes on Friday, October 14, 2022. The classes are listed with times and teachers. A registration form overlay is open on the right, titled 'Registration information'. It shows a progress bar with three steps: 'Account information', 'Who is attending?', and 'Registration forms'. The 'Registration forms' step is active. The form includes sections for 'Student information' with 'Short answer' and 'Long answer' fields, and a 'Multiple selection' section with three choices: 'Choice A', 'Choice B', and 'Choice C'.

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View registration form answers

Agency users can view/edit the registration form answers for a lesson registration by clicking the **Calendar > Lesson view > a registration > ** icon:

Today < > October, 2022 ▾



Month ▾

Select lessons

Register someone

| 2023 Dancing Club | | | | | | |
|-------------------|-----|-----|-----|-----|-----|-------|
| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
| 25 | 26 | 27 | 28 | 29 | 30 | Oct 1 |
| 2 | 3 | 4 | 5 | 6 | | |
| 9 | 10 | 11 | 12 | 13 | | |

10/14/2022 - 10/14/2022
2:00 PM - 4:00 PM



Lesson name

2023 Dancing Club

Participant

Phone number

0000000000

Email

instructor

Jane Doe

Complex

Community Center

Order ID

D-0001CC5X

To edit the form answer, click **Edit**.

Welcome to ACTIVE Reserve! [Click here](#)

Today < > November, 2022 ▾

| Sun | Mon | Tue |
|-----|-----|-------|
| 30 | 31 | Nov 1 |
| 6 | 7 | 8 |
| 13 | 14 | 15 |
| 20 | 21 | 22 |

Form

Edit

Short answer


Test

Long answer

Test


Date

11/15/2022



Time

20:00:0000



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Archive/unarchive forms

In the **Active** folder, to move active forms to the **Archived** folder (archiving a form will cease to display it in subsequent registrations), select the forms and click **Archive**:

Registration forms Create

Folders **Active (2)** Archived (1)

Copy **Archive**

| <input type="checkbox"/> | Form name | Applied to | Created by | Date created |
|-------------------------------------|-----------------|--------------|-------------|--------------|
| <input checked="" type="checkbox"/> | Form1002 | Oil painting | Anila Green | 11/8/2022 |
| <input type="checkbox"/> | English Lessons | | Anila Green | 11/3/2022 |

In the **Archived** folder, to move archived forms back to the **Active** folder, select the forms and click **Unarchive** (you must re-select these forms in any lessons which previously used them to display the forms again during registration).

Registration forms Create

Folders Active (2) **Archived (1)**

Unarchive

| <input checked="" type="checkbox"/> | Form name | Applied to | Created by | Date created |
|-------------------------------------|-----------|------------|-------------|--------------|
| <input checked="" type="checkbox"/> | Form1001 | | Anila Green | 11/7/2022 |

Appendix: Mandatory information in the registration flow

In the registration flow, the following personal information will be collected in the steps prior to the **Registration form**, so you do NOT need to create questions to collect the following mandatory information:

| (Required fields are marked *) | | |
|------------------------------------|------------------|-----------------------------|
| | AUI | CUI |
| Adult (self-sign up) | | |
| | *Name | *Name |
| | Date of Birth | *Date of Birth |
| | Gender | |
| | Phone number | *Participant's phone number |
| | *Email | *Email |
| Kid (Less than 18 yrs. old) | | |
| | *Name | *Name |
| | Date of birth | *Date of birth |
| | Gender | |
| | Phone number | |
| | Email | |
| | *Guardian's name | *Guardian's name |

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| | | |
|--------------------|--------------------------|--------------------------|
| | Guardian's DOB | |
| | Guardian's gender | |
| | Guardian's Phone number | *Guardian's Phone number |
| | *Guardian's Email | *Guardian's Email |
| Other Adult | | |
| | *Name | *Name |
| | DOB | *DOB |
| | Gender | |
| | Phone number | *Phone number |
| | *Email | *Email |
| | *Guardian's Name | *Guardian's Name |
| | *Guardian's DOB | |
| | *Guardian's gender | |
| | *Guardian's phone number | *Guardian's phone number |
| | *Guardian's email | *Guardian's email |