**Day 1 Navigation and Setting up ACTIVE Net Site Worksheet Topics**

**Before giving the worksheet, walk through the following items:  
*You can get them to walk through all of these things with you as you go!***

* ACTIVE Net Database login
* Clean links for login and public access
* Banner Tab Navigation
* System Users and Permissions
* Adding a Logo
* Going to Public Access Site
* Adding Images for the different modules on public access

**Day 1 Population/Customer Creation**

**Before giving the worksheet, walk through the following items:**

* What is a Customer Type?
* Discuss Population **Configuration** tab
* What does a Customer Account Look like?
  + ECV vs Traditional
* Adding New Family Members to Customers
* Adding Pre-existing customers as family members
* Creating split families and why it’s important (ie. divorced parents)
* What is an Organization?
  + What is an Agent?
* What is a Vendor?
* What is an “agent” for an organization and how to add one
* What are Non-profit customers?
* Talk about Customer Consolidate (mass and through customer account)

**How to clean an ACTIVE Net URL for ADMIN login:**

**Link at login:**

[https://activenettr013.active.com/burnaby98/servlet/portalLogin.sdi?param=\*\*B5F30E8F0E7DDF828D2232D832B7065D1FBED67ED979AB886A1D9A4DC239D3A4114B61E4722EDE54E90927C884C3D44135679A02986DB435D5F46C5B7BF41C2AB0C64FC0A9CBA21F5091](https://activenettr013.active.com/burnaby98/servlet/portalLogin.sdi?param=**B5F30E8F0E7DDF828D2232D832B7065D1FBED67ED979AB886A1D9A4DC239D3A4114B61E4722EDE54E90927C884C3D44135679A02986DB435D5F46C5B7BF41C2AB0C64FC0A9CBA21F5091)

**cleaning the link:**

[https://activenet013.active.com/burnaby98/servlet/portalLogin.sdi?param=\*\*B5F30E8F0E7DDF828D2232D832B7065D1FBED67ED979AB886A1D9A4DC239D3A4114B61E4722EDE54E90927C884C3D44135679A02986DB435D5F46C5B7BF41C2AB0C64FC0A9CBA21F5091](https://activenettr013.active.com/burnaby98/servlet/portalLogin.sdi?param=**B5F30E8F0E7DDF828D2232D832B7065D1FBED67ED979AB886A1D9A4DC239D3A4114B61E4722EDE54E90927C884C3D44135679A02986DB435D5F46C5B7BF41C2AB0C64FC0A9CBA21F5091)

**clean link**:

[http://activenet.active.com/burnaby98**/login**](http://activenet.active.com/burnaby98/login)

**If the link is to go to the trainer admin login site, add ‘trainer’ after site name**

[http://activenet.active.com/burnaby98**trainer/login**](http://activenet.active.com/burnaby98trainer/login)