## Section II: Database Population

### Lesson 1: Create Customer Types

**Details:** In order to populate your database with customers, [customer types](#CustTypes) need to be created for the purposes of assigning fees for facility reservations. The functionality also allows for the automation of fees for other services in ActiveNet, but this functionality is seldom used.

* The below two customer types are typical in most clients databases:
  + Private – refers to general customers who own a customer account
  + Non-profit – Typically assigned to non-profit organizations that receive rental discounts due to their non-profit status
* *Tip: Administration Tab > Population Settings > Customer Types*

### Lesson 2: Create a Customer

**Details:** Create a [customer account](#CustAcct) for yourself, entering all pertinent information to have a complete customer record stored in the system

* All required information is indicated with an asterisk, some exceptions exist. Later, you will learn how an organization can control what information is required.
* *Tip: Front Desk Tab > Population > Customers*

### Lesson 3: Create a Customer with a Family Member

**Details:** Create a [family account](#FamAcct) for an individual and his/her spouse

* Create the customer account for your favourite movie star
* Prior to saving his/her customer record, link this person’s spouse to their account by creating a new account for the spouse
* Note: For the following customer creation lessons (including this one), unless specific, exact details pertaining customer details are largely irrelevant
  + Focus should instead be maintained on entering complete information into the system and being able to remember the names of customers entered into your database
* *Tip: Front Desk Tab > Population > Customers*

### Lesson 4: Create a Customer with Multiple Family Members

**Details:** Create a customer account for an individual, his/her spouse, and their children

* Create the customer account for your favourite sports star, his/her spouse, and their two children
* Ensure that both children are aged 7 years old
* Link all customer accounts to one another by saving the accounts as part of family
* *Tip: Front Desk* *Tab > Population > Customers*

### Lesson 5: Create a Customer with a Pre-existing Spouse Account

**Details:** Create a customer account for an individual and add that individual to his/her spouse’s existing account

* Create a customer account for your dream spouse, and link him/her to your account
* Ensure that all details are filled out accordingly
* *Tip: Front Desk Tab > Population > Customers*

### Lesson 6: Create a Customer with a Split Family

**Details:** Create a customer account for Parent A with a child, and then link the child’s account to Parent B (estranged from Parent A)

* Create a customer account for your favourite musician, and add the musician’s child (14 years of age) as another customer account linked to the musician
* Create an account for your favourite musician’s ex-spouse
* Link the child’s account to the spouse’s account as well, ensuring that the child is linked to two separate family accounts
* *Tip: Front Desk Tab > Population > Customers*

### Lesson 7: Continued Customer Creation

**Details:** Continue to create customers using the steps involved as part of this section

* Using the customer accounts visual on the following page, create accounts for all individuals in the non-profit and resident pools (all private have been completed)
* For Resident customers, addresses need to be used which fall within the confines of your city, and accounts need to be linked to other family accounts wherever necessary. Ensure that the Resident box is checked.
* Note: The following functionality is available for automating residency selection, street address look-up and zip code look-up.
* For the Vendor, ensure that the “Is Vendor?” box is checked
* For Non-profit customers, create accounts for each of the individuals, and link them to their respective organizations
  + Model the organizations based on the information provided, using information from your city if necessary (e.g. Vancouver Fire Department)
  + Make sure the organization is set to be Non-profit, but the authorized agent is set to be Private. This is important as many authorized agents will perform transactions for their personal interests as well as performing transactions on behalf of the organization they represent.
* Try to use names of individuals that are easy to remember, as you will be drawing upon this information in later Modules. It is recommended to write these names beside their respective roles as you’re entering their customer record.

*\*\*Note: The customer accounts listed under the private column have already been created in earlier lessons (Lesson 2 – Lesson 6), and do not need to be addressed as part of Lesson*