### Lesson 1: Configure Registration Settings

**Details:** Configure registration settings to by filling in these fields. Remaining fields will be addressed later

* Permit full allowance of online enrolment percentage
* Check age and duplicates for enrollments, include custom questions
* When configuring receipt text, ensure that custom questions do not appear on receipt
* Modify the subject and text for Online receipt e-mails
* Use system generated activity numbers, beginning at 100
* *Tip: Administration Tab > Registration Settings > Configuration*

### Lesson 2: Registration Settings (General)

**Details:** Configure general settings for this module by filling the following fields. Remaining fields will be addressed letter.

* [Seasons](#Season) must be required and dates should be displayed in a simple format
* Do not require payment for non-monetary enrollment
* As per the activity schedules above, allow [parent activities](#PrntActvty) and configure settings such that:
  + Date and time for parent activities are hidden
  + Parent activities can be selected from all sites
  + The number of participants for a parent activity is ignored by the system
* *Tip: Administration Tab > Registration Settings > Configuration*

### Lesson 3: Registration Settings (Default)

**Details:** When configuring default activity search and creation settings, fill in the following fields. Remaining fields will be addressed later.

* In terms of configuring default search settings, develop them such that only activities with open status are generated. Include activities only in the default search.
* For new activities, configure the settings such that new activities entered into the system are defaulted as a tentative status to prevent premature enrolment by customers
* For new activity settings, do not allow quantity-based enrolment, and do ensure that the ability to enroll with a deposit and the requirement of a reason for activity withdrawal are selected
* Include activities in the catalog, show prices online and allow waiting lists for activities by default.
* *Tip: Administration Tab > Registration Settings > Configuration*

### Lesson 4: Develop Activity Types

**Details:** Develop a new activity type to serve as an umbrella for the parent and [sub-activities](#SubActvty) to be created in later lessons. The Activity Type controls what functionality is available to the user when creating an activity – more on this later. Activity types may also be used for searching.

* Name the type ‘Standard Activity,’ and configure the activity type so that the following are achieved:
  + Default settings for new categories are maintained, with the exception of teams, groups, and racing configurations
* *Tip: Administration Tab > Registration Settings > Activity Types*

### Lesson 5: Create Seasons

**Details:** Create the date ranges which will compose the seasons put in place to break up the calendar year to your liking. Seasons represent the different times of a year in which activities are offered.

* Use the basic season names for doing so
  + Spring, Summer, Winter, Fall (Autumn)
* An example of such an equalized (3 month) seasonal structure would be as follows:
  + Winter 20xx: Jan 1 – Mar 30
  + Spring 20xx: Apr 1 – Jun 30
  + Summer 20xx: Jul 1 – Sep 30
  + Fall 20xx: Oct 1 – Dec 31
* Configure the registration settings such that members enjoy a two-week advantage over non-members when registering for new activities in an upcoming season
  + E.g., Members can register activities in Winter 20xx on Dec 15, while non-members must wait until Dec 29 to register for activities in the same season
* *Tip: Administration Tab > Registration Settings > Seasons/Terms*

### Lesson 6: Create Primary Categories

**Details:** Develop a list of [primary categories](#CtgrsPmry) for the activities that will take place in your facilities. Primary categories represent an organization tool used to search for like activities. Primary categories tend to represent the sections of their brochure.

* Use the primary categories to divide all of the activities your facilities will provide into functionally different areas
* Use the following primary categories for your centre’s activities
  + Aquatics
  + Arts & Music
  + Athletics
  + Camps
  + General Enrichment
  + Special Events
* Note: As you may have noticed, all of the activities listed in the activity schedules for this module will fall under the aquatics, and arts & music categories
* Fees will be linked to General Ledger accounts at an Activity level, so it is not necessary to link primary categories to GL accounts
* Link the category to all interests that you believe are related to the category to help develop an [interest list](#IntrstList) which can be used for marketing purposes
* *Tip: Administration Tab > Registration Settings > Activity Primary Categories*

### Lesson 7: Create Secondary Categories

**Details:** Develop a list of [secondary categories](#CtgrsScndry) which will further slice your activities from the primary categories generated in the previous lesson. Secondary categories represent an organization tool used to search for like activities. Secondary categories tend to represent the sections of their brochure.

* Use the secondary categories to divide the activities based on age
* An example of a secondary category structure would be as follows:
  + Adult
  + Family
  + Teenagers
  + Senior
  + Youth
* *Tip: Administration Tab > Registration Settings > Activity Secondary Categories*

### Lesson 8: Configure Interest Lists

**Details:** Develop Interest lists and assign the list to appropriate activity categories.

* + - Create a Swimming Interest list, add an appropriate description and select the Aquatics Category
    - Create a Arts & Music Interest list, add an appropriate description and select the Arts & Music Category
    - *Tip: Communication > List Builder > Interest List*

### Lesson 9: Develop Departments

**Details:** Develop a list of [departments](#Dptmts) which your programs will be housed under. Departments are an organization tool used to search for activities. Departments tend to represent the internal staffing structure and are seldom presented to customer as a means of searching.

* For your department structure, use a simple two-department layout:
  + General Programs
  + Athletic Programs
* Skip dates are not necessary, but you may add them in if you feel that you would like to block out certain dates for registering into your activities
* *Tip: Administration Tab > Registration Settings > Departments*

### Lesson 10: Develop Charges (Template)

**Details:** Using the activity schedules, develop a charge template which will be used when creating individual activity fees in later lessons.

* **Preparation:** Create a “Activity Registration” income GL account
* Create a charge, name the fee “Activity Registration Fee,” and assign the fee correct privileges and settings under the general settings section
* Ensure that the fee is used only for registrations, is labeled as a primary fee, is discountable and is automatically added to new activities
* Seeing as the individual fees will be implemented on an activity level, this particular fee does not require a GL account
* *Tip: Administration Tab > Registration Settings > Charges*

### Lesson 11: Develop Custom Questions

**Details:** Develop custom questions which the customer will have to fill out when registering for a new activity

* Ensure that the title of both questions begin with a word/acronym which will help differentiate your Activity Registration related questions from others
* Use the following questions as examples to help develop your questions
  + What is your T-shirt size?
    - Note: this question would require a single-selection for the user to make, and would need to have the appropriate sizes listed as possible answers
  + Can you help volunteer?
    - Note: this questions could also use a single-selection process to determine the answer, with the appropriate responses being made available (i.e., Yes or No)
* Ensure that the questions are visible to both public and online registrations, as well as made apparent during every transaction
* *Tip: Administration Tab > System Settings > Custom Questions*

### Lesson 12: Develop and Assign Checklist Items

**Details:** [Checklist items](#ChcklstItm) will need to be assigned to certain activities so that they are visible to the registrant, thus requiring their consent

* The pre-generated checklist items may be used for your activities, however, they must still be assigned correctly
* Assign the items to the appropriate site, ensure that they are made visible online, and ensure that the item type is set to waiver
* Create a waiver to allow the Origami created by participants to be displayed in the centre
* *Tip: Administration Tab > System Settings > Checklist Items*

*\*\*Lessons continue on next page\*\**

### Lesson 13: Develop Activities for Classes

**Details:** *This lesson relies heavily on the activity schedules provided at the beginning of this section*

* Use the following diagram to help visualize your activity implementation structure
* An (R) represents a registerable entity in a particular activity branch
* Further instructions to complete this lesson are provided on the following page

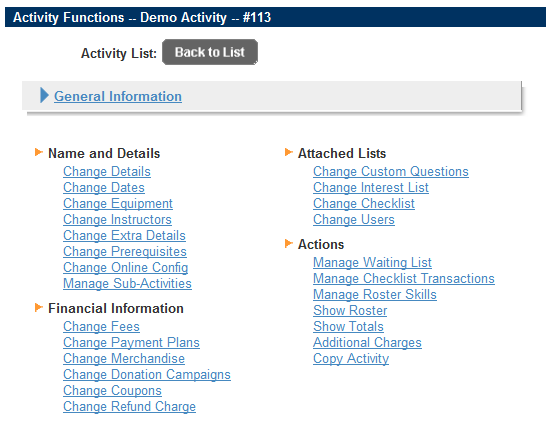
A parent activity could serve as an umbrella activity for its sub-activities, just as it could serve as a standalone activity – where it wouldn’t have multiple seasonal offerings

A sub activity would be created when a parent activity needs to be further divided – due to multiple seasonal offerings, for instance (e.g., Sunday sessions & Thursday sessions)

An example of a secondary category would be ‘senior’

This entire visual representation is of one particular primary category (e.g., aquatics)

* Using activity schedules, begin developing activity structure
* Create new activities in ACTIVE Net for each different activity offered in the schedules
  + - Use the descriptions provided in the activity schedules to enter into the system as catalogue descriptions
    - If there are multiple offerings of the particular type of activity, it is considered a Parent activity
      * For parent activities, only relevant information need be entered, with sub-activities created from the activity functions page once all basic information has been entered
    - For activities with only a sole offering, all relevant details need be entered, including GL account linkages
    - If required, Level II sub activities may be used to further categorize activities
* Charges should be assigned to activities as per the activity schedules
* Checklist items should be assigned to activities as per the activity schedules
* Custom questions should be assigned to activities as per the activity schedules
* Note: For creation of sub-activities and configuration of specific activity details (charges, checklist items, custom questions), use the activity functions page once basic details have been entered
  + Screenshot of Activity Functions page for a Demo Activity is included below
* *Tip: Administration Tab > Registration Settings > Activities*



### Lesson 14: Develop a global discount charge with an offsetting GL account

**Details:** Create an employee discount charges and a GL account equal to a revenue GL account

* Add a new GL account and name it “Discount” with the account type, Income.
* Create a new Registration Charge
  + Assign the charge as a 70% employee discount, select the Discount GL account with a prefill condition of Never
* Add a new Global discount
  + Name it Employee Discount
  + Select the appropriate charge
  + Apply the discount to any activities and any membership packages.
* *Tip: Administration > Financial Settings > Global Discount*

### Lesson 15: Create and apply an advanced discount on a single activity

**Details:** Create a discount for the Adult backcrawl swimming workshop using qualifying options

* Create a new Registration Charge with a Discount Type named “Swimming Discount” and a default prefill condition of Always.
* Add the charge description, select the Discount GL account with a 30% discount.
* Activate Qualifying Activity options, select all the family survival swimming workshops and save this charge
* Add this charge to the Adult Backcrawl Swimming Workshop
* Note: This discount only applies to the Backcrawl swimming workshop when a customer has taken a family survival swimming workshop.

### Lesson 16: Create a multi-person discount

**Details:** Create a discount for family registrations

* Create a new Registration Charge with a Discount Type named “Multi-Child Discount” and a default prefill condition of Always.
* Add the charge description and select the Discount GL account with a 15% discount.
* Add this charge to the Family Origami Lessons (Parent Activity)
* Set the minimum people to two to qualify for Multi-person registration and include registration within the current season
* Add a maximum age of 18
* Note: This charge gives a 15% discount to each additional participant after the first registrant. It is typically used to give discounts to more than one child registering in an activity.