Organizations
Common Functions

Click here to Begin

ACTIVE*Net*

Welcome, Intern Trainer!   **Account ▼**

City of Carlsbad

Front Desk   **Customers**   **Organizations**   **POS**   **Reports**   **Admin**

Front Desk ✕ +
Pending Receipt #1

Pending Receipt #1   Help

▼ **Receipt Actions**

▶ **Registration**
  Enroll
  Enroll from Waiting List
  Transfer

▶ **POS**
  Sell

▶ **Refund/Withdraw**
  Refund/Withdraw Transaction

▶ **Membership**
  Renew Membership
  Sell Membership

▶ **Account Actions**
  Refund from Account
  Pay on Account

▶ **Donation**
  Make Donation

Trainer Site   Pay   Finish   Cancel

Front Desk Menu

▸ Favorites
▸ FlexReg/Private Lessons
▸ Membership
▸ Population
▸ Receipts
▸ Refund
▸ Registrations
▸ Reserve
▸ Help Center
▸ Active Support

Tip:

*Open the **Organizations** module*

Error!

Please Follow the On-Screen
Instructions to Continue

Go Back

ACTIVENet

Welcome, Intern Trainer!   **Account** ▼

City of Carlsbad

Front Desk   Customers   Organizations   POS   Reports   Admin

📎 Front Desk ✕ ＋

Front Desk Home » Organization Search

Organization Search   Help

Add New

▼ Search Criteria

Organization Name [   ] 👤▼

Organization ID [   ]

Address [   ]

City, State, Zip Code [   ] [▼] [   ]

Phone ([   ]) [   ]

Include Prevent Further Use? ☐

Search   Cancel

Front Desk Menu

▸ Favorites
▸ FlexReg/Private Lessons
▸ Membership
▸ Population
▸ Receipts
▸ Refund
▸ Registrations
▸ Reserve
▸ Help Center
▸ Active Support

Tip:

Click **Add New**

City of Carlsbad

Front Desk   **Customers**   **Organizations**   **POS**   **Reports**   **Admin**

📎 Receipt #2 ✕ ➕

Front Desk Home » Change Organization

Change Organization Detail   Help

Organization Name [   ] 👤▾

Street [   ] 🔭 Remove
       [   ]

City, State, Zip Code [   ] [CA ▾] [   ]

☑ Promotional Postal Mail?

▼ **Contact**

Email [   ] ☑ Promotional Email?

Phone 1 ([   ]) [   ] Ext [   ]

Phone 2 ([   ]) [   ] Ext [   ]

Fax ([   ]) [   ] Ext [   ]

Web Site [   ]

▼ **Miscellaneous**

Is Vendor? ☐

Prevent Further Use? ☐

Special Handling? ☐

Geographic Area [▾]

Customer Type [▾]

Payment Terms [   ]

Employer ID Number (EIN) [   ]

Notes [   ]
                            ▾

Front Desk Menu

▸ Favorites
▸ FlexReg/Private Lessons
▸ Membership
▸ Population
▸ Receipts
▸ Refund
▸ Registrations
▸ Reserve
▸ Help Center
▸ Active Support

Tip:

*Enter the **Organization Name***

Front Desk **Customers** **Organizations** **POS** **Reports** **Admin**

📎 Receipt #2 ✕ ➕

Change Organization Detail   Help

▼ **Organization**

Organization Name	Test Organization 👤⌄
Street	_____ 🔍 Remove
	_____
City, State, Zip Code	_____ CA⌄ _____
	☑ Promotional Postal Mail?

▼ **Contact**

Email	_____ ☑ Promotional Email?
Phone 1	(___) _____ Ext ____
Phone 2	(___) _____ Ext ____
Fax	(___) _____ Ext ____
Web Site	_____

▼ **Miscellaneous**

Is Vendor?	☐
Prevent Further Use?	☐
Special Handling?	☐
Geographic Area	⌄
Customer Type	⌄
Payment Terms	_____
Employer ID Number (EIN)	_____
Notes	_____

Tip:

*Enter the **Street Address***

City of Carlsbad

Front Desk | **Customers** | **Organizations** | **POS** | **Reports** | **Admin**

📎 Receipt #2 ✕ ＋

Change Organization Detail

Help

▼ Organization

Organization Name	Test Organization
Street	123 Main St 👤▾ 🔍 Remove
City, State, Zip Code	[ ] CA ▾ [ ]
	☑ Promotional Postal Mail?

▼ Contact

Email	[ ] ☑ Promotional Email?
Phone 1	([ ]) [ ] Ext [ ]
Phone 2	([ ]) [ ] Ext [ ]
Fax	([ ]) [ ] Ext [ ]
Web Site	[ ]

▼ Miscellaneous

Is Vendor?	☐
Prevent Further Use?	☐
Special Handling?	☐
Geographic Area	[▾]
Customer Type	[▾]
Payment Terms	[ ]
Employer ID Number (EIN)	[ ]
Notes	[ ]

Front Desk Menu

▸ Favorites
▸ FlexReg/Private Lessons
▸ Membership
▸ Population
▸ Receipts
▸ Refund
▸ Registrations
▸ Reserve
▸ Help Center
▸ Active Support

Tip:

*Enter the **City***

City of Carlsbad

Front Desk   Customers   Organizations   POS   Reports   Admin

Change Organization Detail   Help

▼ **Organization**

Organization Name   Test Organization

Street   123 Main St   🔎 Remove

City, State, Zip Code   Carlsbad 👤▾   CA ▾

☑ Promotional Postal Mail?

▼ **Contact**

Email   ☑ Promotional Email?

Phone 1   (   )   Ext

Phone 2   (   )   Ext

Fax   (   )   Ext

Web Site

▼ **Miscellaneous**

Is Vendor?   ☐

Prevent Further Use?   ☐

Special Handling?   ☐

Geographic Area   ▾

Customer Type   ▾

Payment Terms

Employer ID Number (EIN)

Notes

Front Desk Menu

▸ Favorites
▸ FlexReg/Private Lessons
▸ Membership
▸ Population
▸ Receipts
▸ Refund
▸ Registrations
▸ Reserve
▸ Help Center
▸ Active Support

Tip:

Enter the *Zip Code.*

*Note that **CA** is automatically entered for you. Be sure to change if the organization is out-of-state.*

ACTIVENet

Welcome, Intern Trainer! **Account ▾**

City of Carlsbad

Front Desk | Customers | Organizations | POS | Reports | Admin

📎 Receipt #2 ✕ ➕

Change Organization Detail | Help

▼ **Organization**

Organization Name | Test Organization
Street | 123 Main St 🔍 Remove
| [   ]
City, State, Zip Code | Carlsbad | CA | 92010 👤▾
| ☑ Promotional Postal Mail?

▼ **Contact**

Email | [   ] ☑ Promotional Email?
Phone 1 ([   ]) [   ] Ext [   ]
Phone 2 ([   ]) [   ] Ext [   ]
Fax ([   ]) [   ] Ext [   ]
Web Site | [   ]

▼ **Miscellaneous**

Is Vendor? ☐
Prevent Further Use? ☐
Special Handling? ☐
Geographic Area ▾
Customer Type ▾
Payment Terms [   ]
Employer ID Number (EIN) [   ]
Notes [   ]

Tip:

Add an **Email**

City of Carlsbad

Front Desk   **Customers**   **Organizations**   **POS**   **Reports**   **Admin**

Receipt #2 ✕

Front Desk Home » Change Organization

Change Organization Detail   Help

▼ **Organization**

Organization Name   Test Organization

Street   123 Main St   🔍 Remove

City, State, Zip Code   Carlsbad   CA   92010

☑ Promotional Postal Mail?

▼ **Contact**

Email   orgEmail@carlsbadca.gov   ☑ Promotional Email?

Phone 1   (___) ___   Ext ___

Phone 2   (___) ___   Ext ___

Fax   (___) ___   Ext ___

Web Site   _____

▼ **Miscellaneous**

Is Vendor?   ☐

Prevent Further Use?   ☐

Special Handling?   ☐

Geographic Area   ▼

Customer Type   ▼

Payment Terms   _____

Employer ID Number (EIN)   _____

Notes   _____

Front Desk Menu

▶ Favorites
▶ FlexReg/Private Lessons
▶ Membership
▶ Population
▶ Receipts
▶ Refund
▶ Registrations
▶ Reserve
▶ Help Center
▶ Active Support

Tip:

*Add a **Phone Number Area Code***

City of Carlsbad

Front Desk   Customers   Organizations   POS   Reports   Admin

📎 Receipt #2 ✕ ＋

Front Desk Home » Change Organization

Change Organization Detail   Help

▼ **Organization**

Organization Name   Test Organization

Street   123 Main St   🔍 Remove

City, State, Zip Code   Carlsbad   CA   92010

☑ Promotional Postal Mail?

▼ **Contact**

Email   orgEmail@carlsbadca.gov   ☑ Promotional Email?

Phone 1   (760)   Ext

Phone 2   (   )   Ext

Fax   (   )   Ext

Web Site

▼ **Miscellaneous**

Is Vendor?   ☐

Prevent Further Use?   ☐

Special Handling?   ☐

Geographic Area

Customer Type

Payment Terms

Employer ID Number (EIN)

Notes

Front Desk Menu

▸ Favorites
▸ FlexReg/Private Lessons
▸ Membership
▸ Population
▸ Receipts
▸ Refund
▸ Registrations
▸ Reserve
▸ Help Center
▸ Active Support

Tip:

*Enter in the **Phone Number***

ACTIVENet.

City of Carlsbad

📎 **Front Desk** 👥 **Customers** 👥 **Organizations** 📊 **POS** 📊 **Reports** 🔑 **Admin**

📎 **Receipt #2** ✕ ➕

Front Desk Home » Change Organization

Change Organization Detail   Help

Front Desk Menu

▸ Favorites
▸ FlexReg/Private Lessons
▸ Membership
▸ Population
▸ Receipts
▸ Refund
▸ Registrations
▸ Reserve
▸ Help Center
▸ Active Support

▼ **Organization**

Organization Name `Test Organization`

Street `123 Main St` 🔍 Remove

`                    `

City, State, Zip Code `Carlsbad` `CA ▾` `92010`

☑ Promotional Postal Mail?

▼ **Contact**

Email `orgEmail@carlsbadca.gov` ☑ Promotional Email?

Phone 1 (`760`) `-4567  👤▾` Ext `    `

Phone 2 (`    `) `        ` Ext `    `

Fax (`    `) `        ` Ext `    `

Web Site `                    `

▼ **Miscellaneous**

Is Vendor? ☐

Prevent Further Use? ☐

Special Handling? ☐

Geographic Area `  ▾`

Customer Type `        ▾`

Payment Terms `                    `

Employer ID Number (EIN) `        `

Notes `                    `
       `                    `
       `                    ` ▾

Tip:

*Select **Customer Type***

Tip:

Select **Non-Profit**

*For this example

ACTIVE Net.

City of Carlsbad

Front Desk | Customers | Organizations | POS | Reports | Admin

Front Desk Menu

- ▶ Favorites
- ▶ FlexReg/Private Lessons
- ▶ Membership
- ▶ Population
- ▶ Receipts
- ▶ Refund
- ▶ Registrations
- ▶ Reserve
- ▶ Help Center
- ▶ Active Support

Receipt #3 ✕

Front Desk Home » Organization: Test Organization » Change Organization

Change Organization Detail   Help

▼ **Organization**

Organization Name	Test Organization
Street	123 Main St 🔍 Remove
City, State, Zip Code	Carlsbad CA 92010
	☑ Promotional Postal Mail?

▶ **Contact**

▼ **Miscellaneous**

Is Vendor?	☐
Prevent Further Use?	☐
Special Handling?	☐
Geographic Area	▾
Customer Type	Non-Profit ▾
Payment Terms	
Employer ID Number (EIN)	
Notes	

Save   Delete   Cancel

Tip:

Save the changes

ACTIVENet.

Welcome, Intern Trainer!   **Account ▾**

City of Carlsbad

📎 **Front Desk**   👥 **Customers**   👥 **Organizations**   📐 **POS**   📊 **Reports**   🔑 **Admin**

📎 Receipt #2 ✕ +

Front Desk Home » Organization: Test Organization

Organization Account Functions   Help

▼ General Information

Organization Name	Test Organization ID: 650
Address	123 Main St Carlsbad, CA 92010
Phones	(760) 123-4567 --
Fax	--
Email	orgEmail@carlsbadca.gov

▼ Organization Functions

- Change Organization Details
- List Transactions
- List Payments Made
- Account Balance
- Pay on Account
- Manage Authorized Agents

- Show Like Organizations
- Merge Two Organizations
- Saved Credit Cards
- Manage Sub-Organization
- Manage Team/Group Categories

Front Desk Menu

- ▸ Favorites
- ▸ FlexReg/Private Lessons
- ▸ Membership
- ▸ Population
- ▸ Receipts
- ▸ Refund
- ▸ Registrations
- ▸ Reserve
- ▸ Help Center
- ▸ Active Support

Tip:

*Open the **Organizations** module*

Tip: *Search for the Organization you just created*

ACTIVENet.

Welcome, Intern Trainer!   **Account** ▼

City of Carlsbad

📎 **Front Desk**   👥 **Customers**   👥 **Organizations**   📐 **POS**   📊 **Reports**   🔑 **Admin**

📎 **Front Desk** ✕ ➕

Organization Search   **Help**

Front Desk Menu

▸ Favorites
▸ FlexReg/Private Lessons
▸ Membership
▸ Population
▸ Receipts
▸ Refund
▸ Registrations
▸ Reserve
▸ Help Center
▸ Active Support

[Add New]

▼ **Search Criteria**

Organization Name	Test Organization	👤 ▾
Organization ID		
Address		
City, State, Zip Code		▾	
Phone (	)	
Include Prevent Further Use? ☐		

[Search]   Cancel

Tip:

*Select **Search***

City of Carlsbad

Front Desk | Customers | Organizations | POS | Reports | Admin

Front Desk Menu

- ▶ Favorites
- ▶ FlexReg/Private Lessons
- ▶ Membership
- ▶ Population
- ▶ Receipts
- ▶ Refund
- ▶ Registrations
- ▶ Reserve
- ▶ Help Center
- ▶ Active Support

📎 Front Desk ✕ ＋

Front Desk Home » Select Company List

Organization Search Results   Help

[Modify Search]   [Add New]

Name	Address	Phone	Prevent Further Use
Test Organization	123 Main St Carlsbad, CA 92010	(760) 123-4567	No

Tip:

*Select the **Name** of the Organization*

City of Carlsbad

ACTIVENet.

Front Desk | Customers | Organizations | POS | Reports | Admin

Organization Account Functions

Help

▼ General Information

Organization Name	Test Organization
	ID: 650
Address	123 Main St
	Carlsbad, CA 92010
Phones	(760) 123-4567
	--
Fax	--
Email	orgEmail@carlsbadca.gov

▼ Organization Functions

- Change Organization Details
- List Transactions
- List Payments Made
- Account Balance
- Pay on Account
- Manage Authorized Agents

- Show Like Organizations
- Merge Two Organizations
- Saved Credit Cards
- Manage Sub-Organization
- Manage Team/Group Categories

Front Desk Menu

- ▸ Favorites
- ▸ FlexReg/Private Lessons
- ▸ Membership
- ▸ Population
- ▸ Receipts
- ▸ Refund
- ▸ Registrations
- ▸ Reserve
- ▸ Help Center
- ▸ Active Support

Tip:

*Select **Front Desk** to complete*

Complete!

Please Navigate to the next module
within this course to continue

Start Over