



ACTIVITY REGISTRATION & MANAGEMENT

REGISTERING A CUSTOMER FOR AN ACTIVITY

1. Open the **Customers** module
2. Search for and select the customer who will be registered for the activity
3. Go to the **Actions** tab
4. Under **New Transactions**, select **New Receipt**
5. Under **Registration**, select **Enroll**
6. Search for and select the activity
7. Enter automatic payment information (if applicable)
8. Answer any custom questions (if applicable) and prompt customer to agree to waivers
9. Click **Enroll**
 - a. If registering for additional programs for the same participant:
 - i. Repeat steps 5-8 as needed
 - b. If registering an additional family member for the same or different programs:
 - i. Under **Registration**, select **Enroll**
 - ii. Search for and select the activity
 1. If activity is the same as other family member, choose second participant's name from the **Potential Customers** list and click **Select**
 - iii. Answer any custom questions (if applicable) and prompt customer to agree to waivers
 - iv. Click **Enroll**
 - v. Repeat as needed
10. Review registrations
11. Click **Pay**
12. Select Payer from **Potential Customers** list and click **Select**
13. Enter payment method (cash, check, or credit card only)
 - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
14. Click **Pay and Finish**

TRANSFERRING AN ACTIVITY

1. Open the **Customers** module
2. Search for and select the customer who is registered for the activity
3. Go to the **Actions** tab
4. Under **New Transactions**, select **New Receipt**
5. Under **Registration**, select **Transfer**
6. Select the activity the customer is transferring out of
7. Search for and select the new activity
8. Under **Transfer Reasons**, select the reason for the transfer from the **Reasons** list (do not use Other)
9. Click **Refund**
10. Answer any custom questions (if applicable) and prompt customer to agree to waivers for the new activity
11. Click **Enroll**
 - a. If transferring programs for the same participant:
 - i. Repeat steps 5-10 as needed
12. Review changes
13. Click **Pay**
14. Select Payer from **Potential Customers** list and click **Select**
15. Enter payment method (cash, check, or credit card only)
 - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
16. Click **Pay and Finish**

WITHDRAWING FROM AN ACTIVITY

1. Open the **Customers** module
2. Search for and select the customer who is registered for the activity
3. Go to the **Actions** tab
4. Under **New Transactions**, select **New Receipt**
5. Under **Refund/Withdraw**, select **Refund/Withdraw Transaction/Cancel Membership**
6. Select the activity the customer is withdrawing from
7. Under **Withdrawal Date**, adjust if needed
8. Under **Withdraw Reasons**, select the reason for the withdrawal from the **Reasons** list (do not use Other)
9. Click **Refund**
10. Review changes
11. Click **Refund**
12. Select appropriate/approved payment method
13. Click **Refund and Finish**

UPDATING AUTOMATIC PAYMENT METHOD

If a family needs to update their credit/debit card or checking account information for their draft in person.

1. Open the **Customers** module
2. Search for and select the child enrolled in the program
3. Go to the **Account Balance** tab on the Customer Account
4. Find the name in the **Account Owner** column
5. Search for and select the name of the Account Owner
6. Go to the **Account Balance** tab under the Account Owner's account
7. In the **Automatic Payment** column, click the link for the payment information attached to the payment plan that needs to be updated
8. Enter new information
9. Click **Submit**
10. Click **Done**