

BASIC CUSTOMER ACCOUNT MANAGEMENT

SEARCHING FOR A CUSTOMER

1. Open the **Customers** module
2. Enter at least two letters the customer's first and/or last name, address, phone number, and/or email into the **Customer Search Criteria**
3. Click **Search Now**
4. Select Customer from the populated list

CREATING A NEW CUSTOMER

Search for all family members to see if they are in the system before creating a new account. If a member of the family already has an account, add missing family members to the existing account. (See page 4)

1. Open the **Customers** module
2. Enter the primary adult's first and last name into the **Customer Search Criteria**
3. Click **Add New Customer**
4. Fill in all required information
 - a. Include email address for at least Head of Household/Primary Member
5. Add all additional family members (Click **Save** if no additional family members need to be added)
 - a. Click **Save and Add New Family Member**
 - b. Fill in all required information
 - i. Include email address if customer is an adult
 - c. Click **Save**
 - d. If additional family members need to be added, click the **Add new customer to selected family** link on the next screen and repeat until all family members have been added
 - e. If Primary Member needs to be changed, select **Head of Household** next to the appropriate customer
 - f. Click **Submit**
 - g. Click **Go back to Customer Account Functions**

ADDING AN EXISTING CUSTOMER TO AN ACCOUNT

If a customer already exists in ACTIVE Net, they can be added to a new or existing account without needing to be reentered into the system

1. Open the **Customers** module
2. Search for and select a customer on the account that the existing customer will be added to
3. In the **Family** tab, click **Manage Family Members**
4. Click **Add existing customer to selected family**
5. Fill in all required information
 - a. Include email address if customer is an adult
6. Click **Save**
7. Repeat as needed
8. If Primary Member needs to be changed, select **Head of Household** next to the appropriate customer
9. Click **Submit**
10. Close pop-up window

ADDING A NEW CUSTOMER TO AN EXISTING ACCOUNT

If a new customer does not already exist in ACTIVE Net, they can be added directly to an existing account

1. Open the **Customers** module
2. Search for and select a customer on the account that the existing customer will be added to
3. In the **Family** tab, click **Manage Family Members**
4. Click **Add new customer to selected family**
5. Search for and select the existing customer
6. Repeat as needed
7. If the address for the customer added to the account is different and should match the address of the account they are being added to, select **Update address to same as** option under **Residential Address** next to each customer whose address needs to be updated
8. If Primary Member needs to be changed, select **Head of Household** next to the appropriate customer
9. Click **Submit**
10. Close pop-up window

UPDATING CUSTOMER INFORMATION

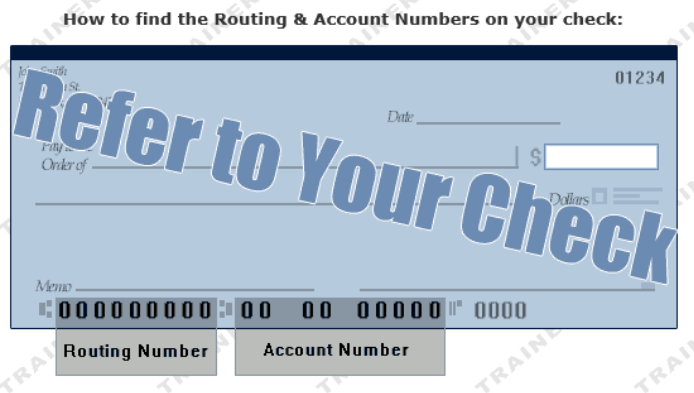
If a new customer does not already exist in ACTIVE Net, they can be added directly to an existing account

1. Open the **Customers** module
2. Search for and select the customer
3. In the **Customer Summary** section of the Customer page, click **Edit**
4. Under **Name and other Details**, select **Change Details** or **Change Address**
 - a. **Change Details**
 - i. Name
 - ii. Gender
 - iii. Date of Birth
 - b. **Change Address**
 - i. Street Address
 - ii. City
 - iii. State
 - iv. Zip Code
 - v. Mailing Address
 - vi. Contact Information (home phone, cell phone, e-mail address, etc.)
 - vii. Emergency Contact Information
5. Click **Save**

ADDING A SAVED PAYMENT METHOD

This adds a card to an account for future use towards purchases and registrations. This does not automatically update payment plans or membership renewals.

1. Open the **Customers** module
2. Search for and select the customer
3. Go to the **Actions** tab
4. Under **Financial Actions**, select **Saved Credit Cards**
 - a. To add a new credit card:
 - i. Click **Add New**
 - ii. Enter new card information
 - iii. Click **Save**
 - b. To add new Electronic Check information:
 - i. Select **Electronic Check List**
 - ii. Click **Add New**
 - iii. For **Name**, enter bank name and last four digits of account
 - iv. Enter **Account Number**
 - v. Enter **Routing Number** (Always nine digits)



The **Routing Number** is usually located between the **⌘** symbols along the bottom of the check.

The **Account Number** is usually listed before the **⌘** symbol along the bottom of the check. Note: The number of digits and location can vary depending on the bank.

- vi. Click **Save**