



GUEST PASS SALES & TRANSFERS (GREATER BERGEN)

SELLING A GUEST PASS: PAID

1. Open the **Customers** module
2. Search for and select the existing customer
3. Go to the **Actions** tab
4. Under **New Transactions**, select **New Receipt**
5. Under **Membership**, select **Sell Membership**
6. Select the appropriate **Category** (Guest Passes)
7. Change **Retention Eligible** option to **All**
8. Click **Search**
9. Select the appropriate 'Guest Pass' package (Do not select 'Comp Guest Pass')
10. For **Dates**, do not change dates
11. Click **Submit**
12. Select or unselect members to be included in the package (if applicable)
13. Click **Submit**
14. Answer any custom questions (if applicable) and prompt customer to agree to waivers
15. Click **Submit**
16. Review transaction details for accuracy
 - a. **Note:** If you need to make a change to the package type or customer, click **Membership Sale** under **Action** and select what needs to be modified and follow prompts/steps above
17. Click **Pay**
18. Select Payer from **Potential Customers** list and click **Select**
19. Enter payment method (cash, check, or credit card only)
 - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
20. Click **Pay and Finish**
21. Print receipt for guest to use to check in (Barcode will print on receipt)

SELLING A GUEST PASS: COMPLIMENTARY

1. Open the **Customers** module
2. Search for and select the existing customer
3. Go to the **Actions** tab
4. Under **New Transactions**, select **New Receipt**
5. Under **Membership**, select **Sell Membership**
6. Select the appropriate **Category** (Guest Passes)
7. Change **Retention Eligible** option to **All**
8. Click **Search**
9. Select the appropriate 'Comp Guest Pass' package (Do not select 'Guest Pass')
10. For **Dates**, do not change dates
11. Click **Submit**
12. Select or unselect members to be included in the package (if applicable)
13. Click **Submit**
14. Under the **Coupons** section, enter the coupon code and click **Apply**
 - a. **Eligible Coupon Codes**
 - i. Tour Trials = GBTourGuest
 - ii. General Complimentary Pass = GBCompGuest
 - iii. Additional codes for special promotions may apply and will be communicated when applicable; Codes for advertisements will be printed on the ad/email
15. Answer any custom questions (if applicable) and prompt customer to agree to waivers
16. Click **Submit**
17. Review transaction details for accuracy
 - a. **Note:** If you need to make a change to the package type or customer, click **Membership Sale** under **Action** and select what needs to be modified and follow prompts/steps above
18. Click **Pay**
19. Select Payer from **Potential Customers** list and click **Select**
20. Enter payment method (cash, check, or credit card only)
 - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
21. Click **Pay and Finish**
22. Print receipt for guest to use to check in (Barcode will print on receipt)

TRANSFERRING A GUEST PASS TO A MEMBERSHIP

For members who wish to join the same day in which they've registered for a guest pass

1. Open the **Customers** module
2. Search for and select the existing customer
3. Go to the **Actions** tab
4. Under **Transactions/Schedule Actions**, select **Membership Inquiry**
5. Select the **Pass Number** for the guest pass
6. Under the **Package** section, click **Transfer packages**
7. Enter any applicable notes needed in the **Staff Notes** section
8. Click **Refund**
9. Enter desired payment frequency in **Package Name**
10. Select the appropriate **Category**
11. Click **Search**
12. Select the appropriate package
13. For **Dates**, do not change dates
 - a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
14. Under the **Automatic Renewal** section
 - a. For **Payer**, select the customer who is the card or bank account holder (must be parent/guardian for Youth and Teen)
 - b. Enter the desired payment method for automatic draft
15. Click **Submit**
16. Select or unselect members to be included in the package (if applicable)
17. Click **Submit**
18. Answer any custom questions (if applicable) and prompt customer to agree to waivers
19. Click **Submit**
20. Review transaction details for accuracy
 - a. **Note:** If you need to make a change to the package type or customer, click **Membership Sale** under **Action** and select what needs to be modified and follow prompts/steps above
21. Click **Pay**
22. Select Payer from **Potential Customers** list and click **Select**

TRANSFERRING A GUEST PASS TO A MEMBERSHIP (Cont.)

For members who wish to join the same day in which they've registered for a guest pass

23. Enter payment method (cash, check, or credit card only) or refund method (Refund to Account only)
 - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
24. Click **Pay and Finish**