



# **MEMBERSHIP SALES & MANAGEMENT**

## SELLING A NEW MEMBERSHIP: FULL RATE & FA

1. Open the **Customers** module
2. Search for and select the existing customer who will be the Primary member on the membership (Adult for Family or specific individual for Youth, Teen, Adult, etc.)
3. Go to the **Actions** tab
4. Under **New Transactions**, select **New Receipt**
5. Under **Membership**, select **Sell Membership**
6. Select the appropriate **Category** (Adult, Family, Teen, or Youth)
7. Click **Search**
8. Select the appropriate package
9. For **Dates**, do not change dates
  - a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
10. 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
11. Click **Submit**
12. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the Payer for a family-type package, child/adult for individual
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**

## SELLING A NEW MEMBERSHIP: FULL RATE & FA (Cont.)

21. Click the **Pass #** next to the customer who needs their picture taken and membership card issued/activated
22. Remove all of the characters in the **Pass Number** box
23. Leave the cursor in the box and scan the membership card or manually enter the barcode number
24. Click **Print Pass**
25. Close pop-up screen
26. Click **Take Picture**
27. Using webcam at your workstation, click **SnapShot** when ready and follow prompts to save
28. Click receipt number in the breadcrumbs at the top of the screen and repeat for all additional customers who are present (if applicable)

## SELLING A NEW MEMBERSHIP: 20/20

1. Open the **Customers** module
2. Search for and select the customer who will be the Primary member on the membership (Adult for Family or specific individual for Youth, Teen, Adult, etc.)
3. Go to the **Actions** tab
4. Under **Update Customer Detail**, select **Alternate Keys**
5. Click **Add New**
6. Select the applicable **Alternate Key Type** (MD – 20/20 Membership)
7. Select the appropriate **Alternate Key Status**
8. For **Alternate Key Id**, enter the first initial, last name and Customer ID of the member who qualifies them for the discounts
  - a. Search for the qualifying member, but do not select them
  - b. Customer ID will be listed in the **Cust ID** column in the search results
9. Click **Save**
10. Click **Go back to Customer Account Functions**
11. Go to the **Actions** tab
12. Under **New Transactions**, select **New Receipt**
13. Under **Membership**, select **Sell Membership**
14. Select the appropriate **Category** (Adult, Family, Teen, or Youth)
15. Click **Search**
16. Select the appropriate package
17. For **Dates**, do not change dates
  - a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
18. 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
19. Click **Submit**
20. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the member the alternate key was assigned to
21. Click **Submit**
22. Answer any custom questions (if applicable) and prompt customer to agree to waivers

## SELLING A NEW MEMBERSHIP: 20/20 (Cont.)

23. Click **Submit**
24. 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
25. Click **Pay**
26. Select Payer from **Potential Customers** list and click **Select**
27. Enter payment method (cash, check, or credit card only)
  - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
28. Click **Pay and Finish**
29. Click the **Pass #** next to the customer who needs their picture taken and membership card issued/activated
30. Remove all of the characters in the **Pass Number** box
31. Leave the cursor in the box and scan the membership card or manually enter the barcode number
32. Click **Print Pass**
33. Close pop-up screen
34. Click **Take Picture**
35. Using webcam at your workstation, click **SnapShot** when ready and follow prompts to save
36. Click receipt number in the breadcrumbs at the top of the screen and repeat for all additional customers who are present (if applicable)
37. Add **Alternate Key** to qualifying member's account (see page 25)

# SELLING A NEW MEMBERSHIP: AT YOUR BEST/RENEW ACTIVE

1. Open the **Customers** module
2. Search for and select the customer
3. Go to the **Actions** tab
4. Under **Update Customer Detail**, select **Alternate Keys**
5. Click **Add New**
6. Select the applicable **Alternate Key Type** (MD – AARP)
7. Select the appropriate **Alternate Key Status**
8. For **Alternate Key Id**, enter the member's confirmation code
9. Click **Save**
10. Click **Go back to Customer Account Functions**
11. Go to the **Actions** tab
12. Under **New Transactions**, select **New Receipt**
13. Under **Membership**, select **Sell Membership**
14. For **Category**, select **At Your Best/Renew Active**
15. For **Retention Eligible**, change to **Non-eligible Membership Only**
16. Click **Search**
17. Select the appropriate package
18. For **Dates**, do not change dates or time periods
19. 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 (Renew Active members who receive the 100% discount will not be charged, but have to have a payment method on file)
20. Click **Submit**
21. Select or unselect members to be included in the package (if applicable)
22. Click **Submit**
23. Answer any custom questions (if applicable) and prompt customer to agree to waivers

## SELLING A NEW MEMBERSHIP: AT YOUR BEST/RENEW ACTIVE (Cont.)

24. Click **Submit**
25. 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
26. Click **Pay**
27. Select Payer from **Potential Customers** list and click **Select**
  - a. **If payment is needed**, enter payment method (cash, check, or credit card only)
    - i. For cash, enter exact amount being given and ACTIVE Net will calculate the change
    - ii. Click **Pay and Finish**
  - b. **If payment is not needed**, click **Finish**
28. Click the **Pass #** next to the customer who needs their picture taken and membership card issued/activated
29. Remove all of the characters in the **Pass Number** box
30. Leave the cursor in the box and scan the membership card or manually enter the barcode number
31. Click **Print Pass**
32. Close pop-up screen
33. Click **Take Picture**
34. Using webcam at your workstation, click **SnapShot** when ready and follow prompts to save
35. Click receipt number in the breadcrumbs at the top of the screen to return to the receipt

## SELLING A NEW MEMBERSHIP: LIVESTRONG GRADUATE

1. Open the **Customers** module
2. Search for and select the customer who will be the Primary member on the membership  
(The customer who graduated from the Livestrong program)
3. Go to the **Actions** tab
4. Under **Update Customer Detail**, select **Alternate Keys**
5. Click **Add New**
6. Select the applicable **Alternate Key Type** (MD – Livestrong Graduate)
7. Select the appropriate **Alternate Key Status**
8. For **Alternate Key Id**, enter your username and the date (MMDDYY)
  - a. Example: jzwain090919
9. Click **Save**
10. Click **Go back to Customer Account Functions**
11. Go to the **Actions** tab
12. Under **New Transactions**, select **New Receipt**
13. Under **Membership**, select **Sell Membership**
14. Select the appropriate **Category** (Adult, Family, Teen, or Youth)
15. Click **Search**
16. Select the appropriate package
17. For **Dates**, do not change dates
  - a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
18. 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
19. Click **Submit**
20. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the member the alternate key was assigned to
21. Click **Submit**
22. Answer any custom questions (if applicable) and prompt customer to agree to waivers



## SELLING A NEW MEMBERSHIP: LIVESTRONG GRADUATE (Cont.)

23. Click **Submit**
24. 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
25. Click **Pay**
26. Select Payer from **Potential Customers** list and click **Select**
27. Enter payment method (cash, check, or credit card only)
  - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
28. Click **Pay and Finish**
29. Click the **Pass #** next to the customer who needs their picture taken and membership card issued/activated
30. Remove all of the characters in the **Pass Number** box
31. Leave the cursor in the box and scan the membership card or manually enter the barcode number
32. Click **Print Pass**
33. Close pop-up screen
34. Click **Take Picture**
35. Using webcam at your workstation, click **SnapShot** when ready and follow prompts to save
36. Click receipt number in the breadcrumbs at the top of the screen and repeat for all additional customers who are present (if applicable)

## SELLING A NEW MEMBERSHIP: ACTIVE DUTY MILITARY

1. Open the **Customers** module
2. Search for and select the customer who will be the Primary member on the membership  
(The customer who is a member of the military)
3. Go to the **Actions** tab
4. Under **Update Customer Detail**, select **Alternate Keys**
5. Click **Add New**
6. Select the applicable **Alternate Key Type** (MD – Military (Active Duty))
7. Select the appropriate **Alternate Key Status**
8. For **Alternate Key Id**, enter your username and the date (MMDDYY)
  - a. Example: jzwain090919
9. Click **Save**
10. Click **Go back to Customer Account Functions**
11. Go to the **Actions** tab
12. Under **New Transactions**, select **New Receipt**
13. Under **Membership**, select **Sell Membership**
14. Select the appropriate **Category** (Adult, Family, Teen, or Youth)
15. Click **Search**
16. Select the appropriate package
17. For **Dates**, do not change dates
  - a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
18. 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)
  - a. Enter the desired payment method for automatic draft (Members who receive the 100% discount will not be charged, but have to have a payment method on file)
19. Click **Submit**
20. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the member the alternate key was assigned to
21. Click **Submit**
22. Answer any custom questions (if applicable) and prompt customer to agree to waivers

## SELLING A NEW MEMBERSHIP: ACTIVE DUTY MILITARY (Cont.)

23. Click **Submit**
24. 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
25. Click **Pay**
26. Select Payer from **Potential Customers** list and click **Select**
27. Enter payment method (cash, check, or credit card only)
  - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
28. Click **Pay and Finish**
29. Click the **Pass #** next to the customer who needs their picture taken and membership card issued/activated
30. Remove all of the characters in the **Pass Number** box
31. Leave the cursor in the box and scan the membership card or manually enter the barcode number
32. Click **Print Pass**
33. Close pop-up screen
34. Click **Take Picture**
35. Using webcam at your workstation, click **SnapShot** when ready and follow prompts to save
36. Click receipt number in the breadcrumbs at the top of the screen and repeat for all additional customers who are present (if applicable)

## SELLING A NEW MEMBERSHIP: NFL

1. Open the **Customers** module
2. Search for and select the customer who will be the Primary member on the membership  
(The customer who is the retired NFL player)
3. Go to the **Actions** tab
4. Under **Update Customer Detail**, select **Alternate Keys**
5. Click **Add New**
6. Select the applicable **Alternate Key Type** (MD – NFL)
7. Select the appropriate **Alternate Key Status**
8. For **Alternate Key Id**, enter your username and the date (MMDDYY)
  - a. Example: jzwain090919
9. Click **Save**
10. Click **Go back to Customer Account Functions**
11. Go to the **Actions** tab
12. Under **New Transactions**, select **New Receipt**
13. Under **Membership**, select **Sell Membership**
14. Select the appropriate **Category** (Adult, Family, Teen, or Youth)
15. Click **Search**
16. Select the appropriate package
17. For **Dates**, do not change dates
  - a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
18. 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
19. Click **Submit**
20. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the member the alternate key was assigned to
21. Click **Submit**
22. Answer any custom questions (if applicable) and prompt customer to agree to waivers

## SELLING A NEW MEMBERSHIP: NFL (Cont.)

23. Click **Submit**
24. 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
25. Click **Pay**
26. Select Payer from **Potential Customers** list and click **Select**
27. Enter payment method (cash, check, or credit card only)
  - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
28. Click **Pay and Finish**
29. Click the **Pass #** next to the customer who needs their picture taken and membership card issued/activated
30. Remove all of the characters in the **Pass Number** box
31. Leave the cursor in the box and scan the membership card or manually enter the barcode number
32. Click **Print Pass**
33. Close pop-up screen
34. Click **Take Picture**
35. Using webcam at your workstation, click **SnapShot** when ready and follow prompts to save
36. Click receipt number in the breadcrumbs at the top of the screen and repeat for all additional customers who are present (if applicable)

## SELLING A NEW MEMBERSHIP: SPECIAL OLYMPICS

1. Open the **Customers** module
2. Search for and select the customer who will be the Primary member on the membership (Adult for Family or specific individual for Youth, Teen, Adult, etc.)
3. Go to the **Actions** tab
4. Under **Update Customer Detail**, select **Alternate Keys**
5. Click **Add New**
6. Select the applicable **Alternate Key Type** (MD – Special Olympics)
7. Select the appropriate **Alternate Key Status**
8. For **Alternate Key Id**, enter the name of the athlete
  - a. Example: Jessica Noname
9. Click **Save**
10. Click **Go back to Customer Account Functions**
11. Go to the **Actions** tab
12. Under **New Transactions**, select **New Receipt**
13. Under **Membership**, select **Sell Membership**
14. Select the appropriate **Category** (Adult, Family, Teen, or Youth)
15. Click **Search**
16. Select the appropriate package
17. For **Dates**, do not change dates
  - a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
18. 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
19. Click **Submit**
20. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the member the alternate key was assigned to
21. Click **Submit**
22. Answer any custom questions (if applicable) and prompt customer to agree to waivers

## SELLING A NEW MEMBERSHIP: SPECIAL OLYMPICS (Cont.)

23. Click **Submit**
24. 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
25. Click **Pay**
26. Select Payer from **Potential Customers** list and click **Select**
27. Enter payment method (cash, check, or credit card only)
  - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
28. Click **Pay and Finish**
29. Click the **Pass #** next to the customer who needs their picture taken and membership card issued/activated
30. Remove all of the characters in the **Pass Number** box
31. Leave the cursor in the box and scan the membership card or manually enter the barcode number
32. Click **Print Pass**
33. Close pop-up screen
34. Click **Take Picture**
35. Using webcam at your workstation, click **SnapShot** when ready and follow prompts to save
36. Click receipt number in the breadcrumbs at the top of the screen and repeat for all additional customers who are present (if applicable)

## SELLING A NEW MEMBERSHIP: ST. BARNABAS WELLNESS

1. Open the **Customers** module
2. Search for and select the customer who will be the Primary member on the membership  
(The customer who is part of St. Barnabas Wellness)
3. Go to the **Actions** tab
4. Under **Update Customer Detail**, select **Alternate Keys**
5. Click **Add New**
6. Select the applicable **Alternate Key Type** (MD – St. Barnabas Wellness)
7. Select the appropriate **Alternate Key Status**
8. For **Alternate Key Id**, enter your username and the date (MMDDYY)
  - a. Example: jzwain090919
9. Click **Save**
10. Click **Go back to Customer Account Functions**
11. Go to the **Actions** tab
12. Under **New Transactions**, select **New Receipt**
13. Under **Membership**, select **Sell Membership**
14. Select the appropriate **Category** (Adult, Family, Teen, or Youth)
15. Click **Search**
16. Select the appropriate package
17. For **Dates**, do not change dates
  - a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
18. 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 (Members who receive the 100% discount will not be charged, but have to have a payment method on file)
19. Click **Submit**
20. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the member the alternate key was assigned to
21. Click **Submit**
22. Answer any custom questions (if applicable) and prompt customer to agree to waivers



## SELLING A NEW MEMBERSHIP: ST. BARNABAS WELLNESS (Cont.)

23. Click **Submit**
24. 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
25. Click **Pay**
26. Select Payer from **Potential Customers** list and click **Select**
27. Enter payment method (cash, check, or credit card only)
  - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
28. Click **Pay and Finish**
29. Click the **Pass #** next to the customer who needs their picture taken and membership card issued/activated
30. Remove all of the characters in the **Pass Number** box
31. Leave the cursor in the box and scan the membership card or manually enter the barcode number
32. Click **Print Pass**
33. Close pop-up screen
34. Click **Take Picture**
35. Using webcam at your workstation, click **SnapShot** when ready and follow prompts to save
36. Click receipt number in the breadcrumbs at the top of the screen and repeat for all additional customers who are present (if applicable)

## SELLING A NEW MEMBERSHIP: COMMUNITY BENEFIT

1. Open the **Customers** module
2. Search for and select the existing customer who will be the Primary member on the membership (Adult for Family or specific individual for Youth, Teen, Adult, etc.)
3. Go to the **Actions** tab
4. Under **Update Customer Detail**, select **Alternate Keys**
5. Click **Add New**
6. Select the applicable **Alternate Key Type** (will start with CB - )
7. Select the appropriate **Alternate Key Status**
8. For **Alternate Key Id**, enter your username and the date (MMDDYY)
  - a. Example: jzwain090919
9. Click **Save**
10. Click **Go back to Customer Account Functions**
11. Go to the **Actions** tab
12. Under **New Transactions**, select **New Receipt**
13. Under **Membership**, select **Sell Membership**
14. For **Category**, select **Community Benefit**
15. For **Retention Eligible**, change to **Non-eligible Membership Only**
16. Click **Search**
17. Select the appropriate package
18. For **Dates**, do not change dates
  - a. **Time Periods** can be changed cases where the Community Benefit membership should be for multiple months
19. Under the **Automatic Renewal** section, leave as **Do not automatically renew**
20. Click **Submit**
21. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the Payer for a family-type package, child/adult for individual
22. Click **Submit**
23. Answer any custom questions (if applicable) and prompt customer to agree to waivers
24. Click **Submit**
25. Review transaction details for accuracy

## SELLING A NEW MEMBERSHIP: COMMUNITY BENEFIT (Cont.)

- 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
26. Click **Finish**
27. Click the **Pass #** next to the customer who needs their picture taken and membership card issued/activated
28. Remove all of the characters in the **Pass Number** box
29. Leave the cursor in the box and scan the membership card or manually enter the barcode number
30. Click **Print Pass**
31. Close pop-up screen
32. Click **Take Picture**
33. Using webcam at your workstation, click **SnapShot** when ready and follow prompts to save
34. Click receipt number in the breadcrumbs at the top of the screen and repeat for all additional customers who are present (if applicable)

## SELLING A NEW MEMBERSHIP: CORPORATE

1. Open the **Customers** module
2. Search for and select the existing customer who will be the Primary member on the membership (The customer who works for the qualifying company/organization)
3. Go to the **Actions** tab
4. Under **Update Customer Detail**, select **Alternate Keys**
5. Click **Add New**
6. Select the applicable **Alternate Key Type** (will start with CP - )
7. Select the appropriate **Alternate Key Status**
8. For **Alternate Key Id**, enter your username and the date (MMDDYY)
  - a. Example: jzwain090919
9. Click **Save**
10. Click **Go back to Customer Account Functions**
11. Go to the **Actions** tab
12. Setup Third Party Billing if applicable (if not, skip to step 14)–
  - a. Under **Update Customer Detail**, select **Third Party Billings**
  - b. Click **Add New**
  - c. Select appropriate **Third Party Payer**
  - d. Enter **Effective Date**
  - e. Select **% amount** and enter appropriate percentage that the third party will be paying
  - f. Click **Save**
  - g. Click **Cancel and go back to Customer Account Functions**
13. Go to the **Actions** tab
14. Under **New Transactions**, select **New Receipt**
15. Under **Membership**, select **Sell Membership**
16. For **Category**, select **Corporate**
17. Click **Search**
18. Select the appropriate package
19. For **Dates**, do not change dates
  - a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years

## SELLING A NEW MEMBERSHIP: CORPORATE (Cont.)

20. 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
21. Click **Submit**
22. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the employee/qualifying customer
23. Click **Submit**
24. If Third Party Billing is applicable, select **Apply third party billing?**
25. Answer any custom questions (if applicable) and prompt customer to agree to waivers
26. Click **Submit**
27. 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
28. Click **Pay**
29. Select Payer from **Potential Customers** list and click **Select**
30. Enter payment method (cash, check, or credit card only)
  - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
31. Click **Pay and Finish**
32. Click the **Pass #** next to the customer who needs their picture taken and membership card issued/activated
33. Remove all of the characters in the **Pass Number** box
34. Leave the cursor in the box and scan the membership card or manually enter the barcode number
35. Click **Print Pass**
36. Close pop-up screen
37. Click **Take Picture**
38. Using webcam at your workstation, click **SnapShot** when ready and follow prompts to save
39. Click receipt number in the breadcrumbs at the top of the screen and repeat for all additional customers who are present (if applicable)

## SELLING A NEW MEMBERSHIP: METRO Y EMPLOYEE

1. Open the **Customers** module
2. Search for and select the employee
3. Go to the **Actions** tab
4. Under **Update Customer Detail**, select **Alternate Keys**
5. Click **Add New**
6. Select the applicable **Alternate Key Type** (YMCA Employee Discount)
7. Select the appropriate **Alternate Key Status**
8. For **Alternate Key Id**, enter your username and the date (MMDDYY)
  - a. Example: jzwain090919
9. Click **Save**
10. Click **Go back to Customer Account Functions**
11. Go to the **Actions** tab
12. Under **New Transactions**, select **New Receipt**
13. Under **Membership**, select **Sell Membership**
14. For **Category**, select **Y Employee**
15. For **Retention Eligible**, change to **Non-eligible Membership Only**
16. Click **Search**
17. Select the appropriate package
18. For **Dates**, do not change dates or time periods
19. Under the **Automatic Renewal** section, change to **Use payment plan for renewal**
20. Click **Submit**
21. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the Payer for a family-type package, child/adult for individual
22. Click **Submit**
23. Answer any custom questions (if applicable) and prompt customer to agree to waivers
24. Click **Submit**

## SELLING A NEW MEMBERSHIP: METRO Y EMPLOYEE (Cont.)

25. 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
26. Click **Finish**
27. Click the **Pass #** next to the customer who needs their picture taken and membership card issued/activated
28. Remove all of the characters in the **Pass Number** box
29. Leave the cursor in the box and scan the membership card or manually enter the barcode number
30. Click **Print Pass**
31. Close pop-up screen
32. Click **Take Picture**
33. Using webcam at your workstation, click **SnapShot** when ready and follow prompts to save
34. Click receipt number in the breadcrumbs at the top of the screen and repeat for all additional customers who are present (if applicable)

## TAKING A PICTURE & ISSUING NEW MEMBERSHIP CARD

1. Open the **Customers** module
2. In the menu on the left side of the screen, under **Membership**, select **Pass Production**
3. Search for and select the desired customer
  - a. New card:
    - i. Remove all of the characters in the **Pass Number** box
    - ii. Leave the cursor in the box and scan the membership card or manually enter the barcode number
    - iii. Click **Print Pass**
    - iv. Close pop-up screen
  - b. Take Picture:
    - i. Click **Take Picture**
    - ii. Using webcam at your workstation, click **SnapShot** when ready and follow prompts to save



## ADDING/REMOVING ALTERNATE KEYS

1. Open the **Customers** module
2. Search for and select the desired customer
3. Go to the **Actions** tab
4. Under **Update Customer Detail**, select **Alternate Keys**
  - a. To modify an existing Alternate Key
    - i. Click the Alternate Key ID
    - ii. Adjust Type, Status, and/or ID as needed
  - b. To delete an Alternate Key
    - i. Click the Alternate Key ID
    - ii. Click **Delete**
  - c. To add a new Alternate Key
    - i. Click **Add New**
  - d. Select the applicable **Alternate Key Type**
  - e. Select the appropriate **Alternate Key Status**
  - f. Enter appropriate **Alternate Key Id**,
    - i. Corporate Partner – Username and date (MMDDYY)
    - ii. Community Benefit – Username and date (MMDDYY)
    - iii. 20/20 – Qualifying member’s first initial, last name and Customer ID
      1. Search for the qualifying member, but do not select them
      2. Customer ID will be listed in the **Cust ID** column in the search results
    - iv. AARP (At Your Best/Renew Active) – Confirmation code
    - v. Livestrong Graduate – Username and date (MMDDYY)
    - vi. Active Duty Military – Username and date (MMDDYY)
    - vii. NFL – Username and date (MMDDYY)
    - viii. Special Olympics – Athlete’s name
    - ix. St. Barnabas Wellness – Username and date (MMDDYY)

## ADDING A CUSTOMER TO AN EXISTING MEMBERSHIP

*This is to add children or a second adult to a Family membership. To add additional adults, see page 27-28.*

1. Open the **Customers** module
2. Search for and select the Primary member
3. Go to the **Family** tab
4. Select **Manage Family Members** in the top right corner of the first box
5. Add a customer:
  - a. **New/not in ACTIVE Net** –
    - i. Select **Add new customer to selected family**
    - ii. Enter additional family member's information and click **Save**
      1. **Note:** Some information will auto populate. All information should be reviewed and updated as needed.
  - b. **Existing/already in ACTIVE Net**
    - i. Select **Add existing customer to selected family**
    - ii. Search for and select the customer
6. ACTIVE Net will prompt you to add the new customer to the membership package if they qualify

# ADDING ADDITIONAL ADULT TO FAMILY MEMBERSHIP

*This is to add an additional adult to an existing family membership.*

1. Open the **Customers** module
2. Search for and select the Primary member
3. Go to the **Family** tab
4. Select **Manage Family Members** in the top right corner of the first box
5. To add a customer:
  - a. **New/not in ACTIVE Net** –
    - i. Select **Add new customer to selected family**
    - ii. Enter additional family member's information and click **Save**
      1. **Note:** Some information will auto populate. All information should be reviewed and updated as needed.
  - b. **Existing/already in ACTIVE Net**
    - i. Select **Add existing customer to selected family**
    - ii. Search for and select the customer
6. Under the new customer, go to the **Actions** tab\*\*\*
7. Under **New Transactions**, select **New Receipt**
8. Under **Membership**, select **Sell Membership**
9. For **Category**, select **Family**
10. Click **Search**
11. Select the appropriate **Additional Adult** package (must be same renewal period)
12. For **Dates**, do not change dates or time periods
13. 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
14. Click **Submit**
15. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the Payer for a family-type package, child/adult for individual
16. Click **Submit**
17. Answer any custom questions (if applicable) and prompt customer to agree to waivers
18. Click **Submit**
19. Review transaction details for accuracy

## ADDING ADDITIONAL ADULT TO FAMILY MEMBERSHIP (Cont.)

- 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

20. Click **Pay**

21. Select Payer from **Potential Customers** list and click **Select**

22. Enter payment method (cash, check, or credit card only)

- a. For cash, enter exact amount being given and ACTIVE Net will calculate the change

23. Click **Pay and Finish**

24. Click the **Pass #** next to the customer who needs their picture taken and membership card issued/activated

\*\*\*For an Additional Adult who will be part of a Corporate Partner Family membership, first add 20/20 Alternate Key with name and Customer ID of Primary member on the Family membership

1. Go to the **Actions** tab
2. Under **Update Customer Detail**, select **Alternate Keys**
3. Click **Add New**
4. Select the applicable **Alternate Key Type** (MD – 20/20 Membership)
5. Select the appropriate **Alternate Key Status**
6. Enter **Alternate Key Id** – Qualifying member's first initial, last name and Customer ID for 20/20
  - a. Search for the qualifying member, but do not select them
  - b. Customer ID will be listed in the **Cust ID** column in the search results

## RENEWING MEMBERSHIP

1. Open the **Customers** module
2. Search for and select the desired customer
3. Go to the **Actions** tab under the member who's membership is being transferred
4. Under **Transactions/Schedule Actions**, select **Membership Inquiry**
5. Select the pass number for the appropriate package
6. Under the **Membership** section, select **Renew Membership**
7. Click **Submit**
8. For **Dates**, do not change dates
  - a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
9. Under the **Automatic Renewal** section (if applicable)
  - a. For **Payer**, select the customer who is the card or bank account holder (must be parent/guardian for Youth and Teen)
10. Enter the desired payment method for automatic draft
11. Click **Submit**
12. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the Payer for a family-type package, child/adult for individual unless an alternate family member qualifies the family for a discount
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**

## UPDATING MEMBERSHIP DRAFT INFORMATION

1. Open the **Customers** module
2. Search for and select the desired customer
3. Go to the **Actions** tab
4. Under **Transactions/Schedule Actions**, select **Membership Inquiry**
5. Select the pass number for the appropriate package
6. Under the **Automatic Renewal** section make necessary changes (change Payer and/or add new/change payment method)
7. Click **Submit Renewal Changes**

## TRANSFERRING A MEMBERSHIP

1. Open the **Customers** module
2. Search for and select the desired customer
3. Add new/existing customers if needed
4. Go to the **Actions** tab under the member who's membership is being transferred
5. Under **Transactions/Schedule Actions**, select **Membership Inquiry**
6. Select the pass number for the appropriate package
7. Under the **Package** section, select **Transfer packages**
8. Click **Refund**
9. Search for and select the new package
10. For **Dates**, do not change dates
  - a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
11. 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)
12. Enter the desired payment method for automatic draft
13. Click **Submit**
14. Select or unselect members to be included in the package (if applicable)
  - a. **Note:** Make sure the customer selected as **Primary** is the Payer for a family-type package, child/adult for individual
15. Click **Submit**
16. Answer any custom questions (if applicable) and prompt customer to agree to waivers
17. Click **Submit**
18. 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
19. Click **Pay**
20. Select Payer from **Potential Customers** list and click **Select**
21. Enter payment method (cash, check, or credit card only)
  - a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
22. Click **Pay and Finish**

## SUSPENDING MEMBERSHIP

*After accepting the member's cancelation form, before the member leaves, register the member in the Membership Cancelation for the current month.*

1. Open the **Customers** module
2. Search for and select the customer whose membership will be suspended
3. Go to the **Actions Tab**
4. Under **New Transactions**, select **New Receipt**
5. Under **Registration**, select **Enroll**
6. Search for and select the Membership Suspension activity
7. Answer the custom questions and prompt customer to agree to waiver
8. Click **Enroll**
9. Click **Finish**
10. Email receipt to manager responsible for membership suspensions



## CANCELING MEMBERSHIP

*After accepting the member's cancelation form, before the member leaves, register the member in the Membership Cancelation for the current month.*

11. Open the **Customers** module
12. Search for and select the customer whose membership will be canceled
13. Go to the **Actions Tab**
14. Under **New Transactions**, select **New Receipt**
15. Under **Registration**, select **Enroll**
16. Search for and select the Membership Cancelation activity
17. Answer the custom questions and prompt customer to agree to waiver
18. Click **Enroll**
19. Click **Finish**
20. Email receipt to manager responsible for membership cancelations