

Overview of the Enhanced Customer View



Click the **Customers** icon in the top banner area whenever you want to interact with customers and process customer transactions. After you click the **Customers** icon, the **Enhanced Customer View** (ECV) appears as a self-contained interface in the ACTIVE Net content area.

Note: The ECV layouts in this document are based on ACTIVE Net's recommended best practices for most organizations. Your organization's layout may differ from the layouts in the images below.

When the ECV appears, first search for and select the customer who you want to work with.

Customer Sear	Customer Se	arch Criteri	a B Ad	d New Cust	ome	r			
- Customer Search C	riteria (1 record found)								
	helsea	Phone					_		
Last Name	icisea	Email	<u></u>						
Sounds Like?	Exact Match?								
Entered Since									
Include Retired?									
Search Now Cle	ear Add New Custom	er							
Customer ID		Go							
-									
Name	Address	Phone	Email	Date of Birth	M/F	Cust Type	Cust ID	Customer Since	Retired?
Chortle, Chelsea	6400 Roberts	(H): (604) 404-0404	chelsea@chelsea.org	09/12/1969	F	Private Individual	48	02/19/2013	No
	Burnaby, BC V5G 4C9	(W):							
		h results							

Customer Search Criteria: The Customer Search Criteria area displays fields that you can use to search for customers.

B Add New Customer: Click Add New Customer to create a new customer, if the customer you want to work with does not appear in your search results.

Search results: The search results area displays customers who match your search criteria.

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When you search for and select a customer, a new tab appears in the ECV for that customer. You can keep this tab open while you search for and work with other customers if you think you'll want to return to the current customer at a later time.

Tabs and areas within the main customer tab display different aspects of the customer's account.

ielsea Chortle	Edit Detail Family	History Accou	nt Balance Actions				
Address: 6400 Roberts	Upcoming Activit		it balance Pictures			and the first state of the second	
Burnaby, BC V5G 4C9	Date	Time	Activity/Program		Ne	Receipt	New FlexReg Enroll
Home/Main: (604) 404-0404 Work: <u>Add Customer Photo</u>	Thu Jul 3, 2014	7pm - 9pm	Acting for Beginners #1160	Refund	Transfer	1000457.002	Gym - Full
DOB: 09/12/1969 Iedical Alert:	Thur 201 2 2000	7 0	A dias for Desirence	III Defined	T	1000517-000	Sin 0
	Current Members	ships					New Membe
	Membership	Since	Effective	Expires	Max Uses	Uses Left	
	All Access Adult	02/19/2013	02/19/2013	02/19/2014		N/A	Renew
	Upcoming Reserved No records found	vations					New Quick Reserv
Total credit on account: (\$241.00) Total owed on account: \$304.45 mount owed by Family Members: \$0.00	No records found						<u>New Quick Reserv</u>
Total credit on account: (\$241.00) Total owed on account: \$304.45	Balance No records found	Alerts	Type	Alert2	Valid From	In	
Total credit on account: (\$241.00) Total owed on account: \$304.45 mount owed by Family Members: \$0.00 Total owed: \$304.45	No records found	Alerts Note/Alert These are notes	Type Comment	Alert? Yes	Valid From	То 	New Quick Reserve
Total credit on account: (\$241.00) Total owed on account: \$304.45 umount owed by Family Members: \$0.00 Total owed: \$304.45	Ro records found Balance Customer Notes/ Description Found avm bas in change room, now	Alerts Note/Alert These are notes					Entered
Total credit on account: (\$241.00) Total owed on account: \$304.45 mount owed by Family Members: \$0.00 Total owed: \$304.45	Ralance Customer Notes/ Description Found with Back Loss & found	Alerts Note/Alert These are notes		Yes			Entered 03/11/2014
Total credit on account: (\$241.00) Total owed on account: \$304.45 mount owed by Family Members: \$0.00 Total owed: \$304.45	Ralance Customer Notes/ Description Found with Back Loss & found	Alerts Note/Alert These are notes		Yes			Entered 03/11/2014

- A ECV tabs: The customer tab contains areas and tabs that show information about a specific customer. The Customer Search tab stays open so that you can search for other customers while still keeping the current customer open in their own tab.
- **B Customer summary**: This area displays basic information about the customer you are working with. To change any of these details, click Edit. This area remains on the screen no matter which customer tab you choose on the right.
- **C Customer tabs**: Use the different customer tabs to switch between different kinds of information and tasks for this customer's account. The first tab that appears is the Detail tab.
- Account Balance: This area displays a summary of the customer's account totals. You can use the links in the header to make payments or adjust the account balance. This area remains on the screen no matter which customer tab you choose on the right.

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The **Detail** tab displays the customer's current and upcoming enrollments, memberships, reservations, and notes.

Upcoming Activi	ties/FlexReg			Ne	w Activity Enrollment	New FlexReg Enrol
Date	Time	Activity/Program			Receipt	Location
Thu Jul 3, 2014	7pm - 9pm	Acting for Beginners #1160	Refund	Transfer	1000457.002	<u>Gym - Full</u>
Thu 3ul 2 2014	7	A shine for the sine of		T	1000547-000	<u> </u>
Current Member	ships					New Memb
Membership	Since	Effective	Expires	Max Uses	Uses Left	
All Access Adult	02/19/2013	02/19/2013	02/19/2014		N/A	Renew
er Balance						
r Balance Custom ar Notes	Alerts					
Customar Notes Description	Note/Alert	Туре	Alert?	Valid From	Το	Entered
Customer Notes	Note/Alert These are notes	Type Comment	Alert? Yes	Valid From	To 	Entered 03/11/2014
Customar Notes, Description Found aym bag in change point; now	Note/Alert These are notes			Valid From	To 	
Custom ar Notes, Description Found oym bag in change inport lost & found	Note/Alert These are notes		Yes	Valid From	To	
Custom ar Notes, Description Found oym bag in change inport lost & found	Note/Alert These are notes		Yes	Valid From	To	
	Thu Jul 3 2014	The Jul 2 2014 7pm - 9pm 	Thu Jul 3 2014 7pm - 9pm Acting for Regimers. #1150 Current Memberships Membership Since Effective All Access Adult 02/19/2013 02/19/2013 Upcoming Reservations No records found	The Jul 2 2014 7pm - 9pm Acting for Besimers. Befund #1160 #1160 #1160 #1160 Current Hemberships Image: Contract Hemberships Image: Contract Hemberships Hembership Since Effective Expires All Access Adult 02/19/2013 02/19/2013 02/19/2014 Upcoming Reservations No records found Image: Contract Hemberships	Thu Jul 3 2014 7pm - 9pm Actino for Resiners. Rafund Transfer #1150 = 0.000 -	Thu Jul 3 2014 7pm Acting for Beginners, g1150 Refund Transfer 1000457.002 Image: State of the Residue of th

- A Upcoming Activities/FlexReg: This area displays a list of the customer's upcoming activity and flexreg enrollments, along with links to view more about the activity/program, receipt, and location. This area also includes links to refund or transfer the enrollment and to create a new enrollment.
- **B Current Memberships**: This area displays a list of the customer's current memberships, along with links to view more about each membership. This area also includes links to renew the membership and to enroll in a new membership.
- **C** Upcoming Reservations: This area displays a list of the customer's upcoming reservations, along with links to create a new reservation.
- Customer Notes/Alerts: This area displays a list of notes and alerts that other staff members have attached to this customer. Click a note description to view and edit the note, or click Add to create a new note or alert.

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The Family tab displays the customer's family members and schedule.

elsea Chortle	F	Edit Detail Family	History Account Balance	Actions			
Address: 6400 Roberts		Chortle Family M				Change Addresse	es Manage Family Memb
Burnaby, BC V5G 40 Home/Main: (604) 404-0404	C9	Family	Family Member Role	Birth Date		Mailing/Billing	es manage ramity memo
Work:		Chortle (#23)	Chelsea Chortle (H) Adult / Guar	rdian 09/12/1969	Address 6400 Roberts	Address Same as residential Remove	Add Photo
Add Customer Photo DOB: 09/12/1969 ledical Alert:		Chorde (#23)	Cheisea Chorde (h) <u>Addit/ Sdai</u>	<u>ulan</u> 09/12/1909	Burnaby, BC V5G 4C9 (604) 404-0404	Same as residential <u>Remove</u>	Add Photo
	Adjust Balance Transfer Balar	Family Schedule					
ount Balance <u>Pay on Account</u> Total credit on account: Total owed on account:	(\$241.00)	Family Schedule Family Member	Day	Time	Scheduled Item		Facility
Total credit on account: Total owed on account: nount owed by Family Members: Total owed:	(\$241.00) \$304.45 \$0.00 \$304.45	Family Schedule	Day Thu 07/03/2014	Time 7pm - 9pm	Scheduled Item Acting for Beginners #1160		Facility Gvm - Full
Total credit on account: Total owed on account: nount owed by Family Members:	(\$241.00) \$304.45 \$0.00 \$304.45	Family Schedule Family Member			Acting for Beginners		
Total credit on account: Total owed on account: nount owed by Family Members: Total owed:	(\$241.00) \$304.45 \$0.00 \$304.45	Family Schedule Family Member Chelsea Chortle		7pm - 9pm	Acting for Beginners #1160 Acting for Beginners		<u>Gvm - Full</u>
Total credit on account: Total owed on account: nount owed by Family Members: Total owed:	(\$241.00) \$304.45 \$0.00 \$304.45	Family Schedule Family Member Chelsea Chortle Chelsea Chortle		7pm - 9pm 7pm - 9pm	Acting for Beginners #1160 Acting for Beginners #1161 Acting for Beginners	Waitlisted	<u>Gvm - Full</u> Pine Room
Total credit on account: Total owed on account: nount owed by Family Members: Total owed:	(\$241.00) \$304.45 \$0.00 \$304.45	Family Schedule Family Member Chelsea Chortle Chelsea Chortle Chelsea Chortle	Thu 07/03/2014	7pm - 9pm 7pm - 9pm 7pm - 9pm	Acting for Beginners #1160 Acting for Beginners #1161 Acting for Beginners #1161	Waitisted	Gym - Full Pine Room Pine Room

A Family Members: This area displays a list of the customer's family members, along with links to edit each member.



B Family Schedule: This area displays a schedule of the family's upcoming events, along with links to view more about scheduled events and facilities.





The **History** tab displays all transactions and ledger postings for the customer.

elsea Chortle 🖾 Customer Search						
elsea Chortle	Edit Detail Family Hit	tory Account Balan	Actions			
Address: 6400 Roberts		ACCOUNT DUILUN	Actions			
Burnaby, BC V5G 4C9	Transactions Lec	lger				
Home/Main: (604) 404-0404 Work:	FlexReg	Donations	Reservations 🖌 Gif	t Cards	Current Customer	
Add Customer Photo	Membership	Point of Sale	Registrations 🖌 Co	mmunications F	rom: 06/02/2014	
DOB: 09/12/1969	Account Changes			uipment Loans		
1edical Alert:	Select all Deselect				То:	
	Select all Deselect	aii			Get Records Now	
	Date	Customer	User	Туре	Detail	Description
	Jun 10, 2014 4:00 PM	Chelsea Chortle	Dalyce Weigum	Enroll	1000552.002	Guitar Lessons #1276
	Jun 9, 2014 8:41 AM	Chelsea Chortle	Dalyce Weigum	Enroll	1000548.002	Acting for Beginners #1161
count Balance Pay on Account Adjust Balance Tran	Jun 5, 2014 9:16 PM	Chelsea Chortle	Dalyce Weigum	Enroll	1000547.002	Acting for Beginners #1161
Total credit on account: (\$241.00)	Jun 2, 2014 10:35 PM	Chelsea Chortle	Dalyce Weigum	Enroll	1000543.002	Adult Men 18-29
Total owed on account: \$304.45						Recreation League #1233
mount owed by Family Members: \$0.00 Total owed: \$304.45						
Amount due now: \$304.45						

A **Transactions** tab: The Transactions tab displays a list of the customer's transactions within a specific date range, along with links to view the associated receipts and transaction details.

B Ledger tab: The Ledger tab displays the list of charges that affect the customer's account balance within a specific date range, along with links to view the associated receipts and transaction details.

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The **Account Balance** tab displays the charges that make up the customer's current amount due and the individual payments and credits that make up the customer's current total credit on account.

		Edit	Detail Famil	y History Acc	ount Balance Ad	tions				
Address: 6400			Payables							Pay on Acco
Burna Home/Main: (604)	by, BC V5G 4C	C9	Receipt	Date Created	Account Owner	Original Amount	Current Balance	Next Payment	Next Due Date	Automatic
Work:	+0+-0+0+		necapt	butto created	riccount onner	original ranoant	current buturee		Heat Due Dute	Payment
	Customer Photo		3000131.002	Sep 11, 2013	Chelsea Chortle	\$225.00	\$175.00	\$175.00	Sep 26, 2013	No
DOB: 09/12			1000106.001	Sep 30, 2013	Chelsea Chortle	<u>\$2.81</u>	\$2.81	\$2.81	Sep 30, 2013	No
edical Alert:			1000122.001	Oct 31, 2013	Chelsea Chortle	\$2.85	\$2.85	\$2.85	Oct 31, 2013	No
		1000139.001	Nov 30, 2013	Chelsea Chortle	<u>\$2.89</u>	\$2.89	\$2.89	Nov 30, 2013	No	
			1000155.001	Dec 31, 2013	Chelsea Chortle	<u>\$2.93</u>	\$2.93	\$2.93	Dec 31, 2013	No
		1000171.001	Jan 31, 2014	Chelsea Chortle	<u>\$2.97</u>	\$2.97	\$2.97	Jan 31, 2014	No	
		3000162.002	Feb 24, 2014	Chelsea Chortle	\$75.00	\$75.00	\$75.00	Feb 24, 2014	No	
		1000194.001	Mar 24, 2014	Chelsea Chortle	\$10.00	\$10.00	\$10.00	Mar 24, 2014	No	
		1000221.001	Apr 24, 2014	Chelsea Chortle	\$10.00	\$10.00	\$10.00	Apr 24, 2014	No	
		1000241.001	May 24, 2014	Chelsea Chortle	<u>\$10.00</u>	\$10.00	\$10.00	May 24, 2014	No	
			1000273.001	Jun 24, 2014	Chelsea Chortle	\$10.00	\$10.00	\$10.00	Jun 24, 2014	No
Total credit	t on account:		Credits on Acco Receipt		omer	Description	T	ansaction Date	Debit (C	redit)
	d on account:		1000392.002		ea Chortle	Payment from a		12, 2014	\$36.00	cutty
ount owed by Fami	Total owed:									
Amo	unt due now:		1000351.002		ea Chortle	Payment from a		v 4, 2013	\$157.00	
			2000032.002		ea Chortle	Refund to accou		t 8, 2013	(\$90.00)	
			2000020.002	Chels	ea Chortle	Refund to accou	int Se	p 9, 2013	(\$344.00)	
									(\$241.00)
				1						

A **Payables**: The Payables area displays a breakdown of all the charges that make up the customer's current Total owed so that you can see at a glance how the total is added up.

B Credits on Account: The Credits on Account area displays a breakdown of all the payments and credits that make up the customer's current Total credit on account so that you can see at a glance how the total is added up.

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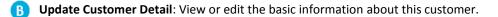




The **Actions** tab displays links to tasks that you can perform with this customer, along with parts of the customer's account that you can view or edit.

	ustomer Search.						
elsea Chortle			Edit	Detail Family History	Account Balance Actions		
Address: 6400 Burna Home/Main: (604) Work:	by, BC V5G 4C	9		New Transactions	Update Customer Detail	Update Customer Lists	Financial Actions Account Balance
DOB: 09/12	Customer Photo /1969			New FlexReg Enrollment	Address / Contact Information	Mailing List Interests	Request Refund
Medical Alert:				New Reservation	<u>Alternate Kevs</u> <u>Family</u>	Skills Authorized Pickups	Pay on Account Adjust Balance
				New Receipt	<u>Extra Details</u> Notes / Alerts	Awards Custom Question Answers	Transfer Balance Credit Cards
					Verify Identity	Uploaded Files	<u>Scholarships</u> List Payments
							Scheduled Refunds
	on Account A		r Balance				Manage Linked Credit
	d on account:	\$304.45			ons Account History	Miscellaneous	Leaver
	Total owed: unt due now:	\$304.45		Activity Grades	Ledger Payments	Access My Account Merge Two Customers	
				Checklist Transactions	Transactions	Show Like Customers	
				Coupons	Communications	Set Default Check-in Membership	
				Family Schedule Gift Cards	Account Changes All History		
				Locker Reservations			

A New Transactions: Start a new transaction with this customer, such as a new enrollment, reservation, or membership. If the transaction you want to begin is not listed, click New Receipt to view a more comprehensive list of options.



Update Customer Lists: View or edit the lists of attributes and other items that are associated with this customer, such as the list of people authorized to pick up this customer, the list of their answers to custom questions, and the list of their skills.

Financial Actions: View or edit the financial parts of this customer's account, such as their credit cards, payment plans, and scheduled refunds.

Transaction / Schedule Actions: View or edit different aspects of this customer's current and past transactions, including their grades, their locker rentals, and the gift cards associated with their account.

Account History: View the history of this customer's transactions, including their payments and communications.

Miscellaneous: Sign in to the public site as this customer, or merge this customer with a duplicate customer.

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