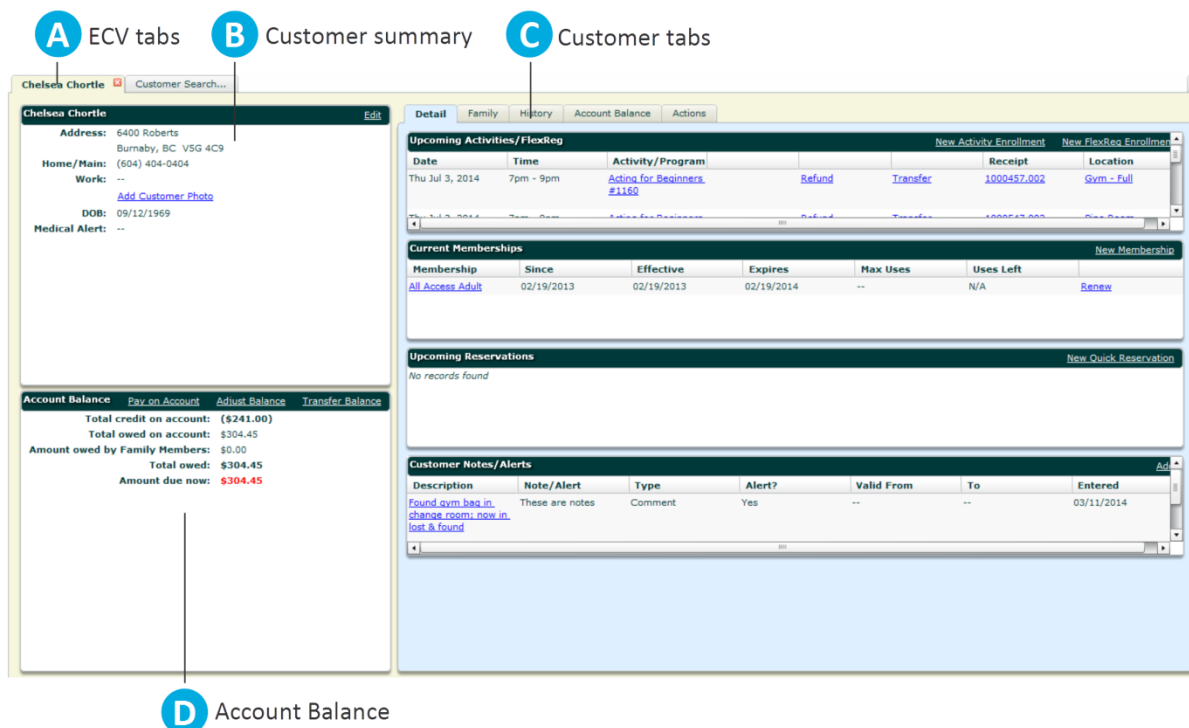


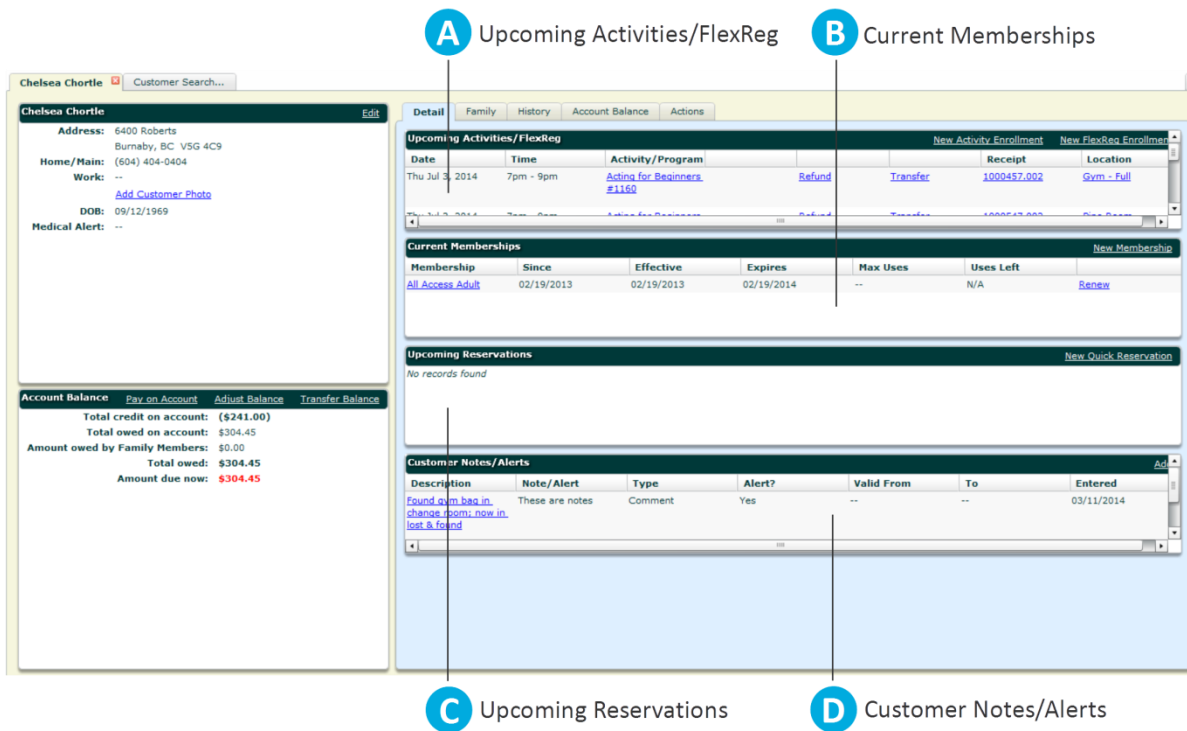
When you search for and select a customer, a new tab appears in the ECV for that customer. You can keep this tab open while you search for and work with other customers if you think you'll want to return to the current customer at a later time.

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



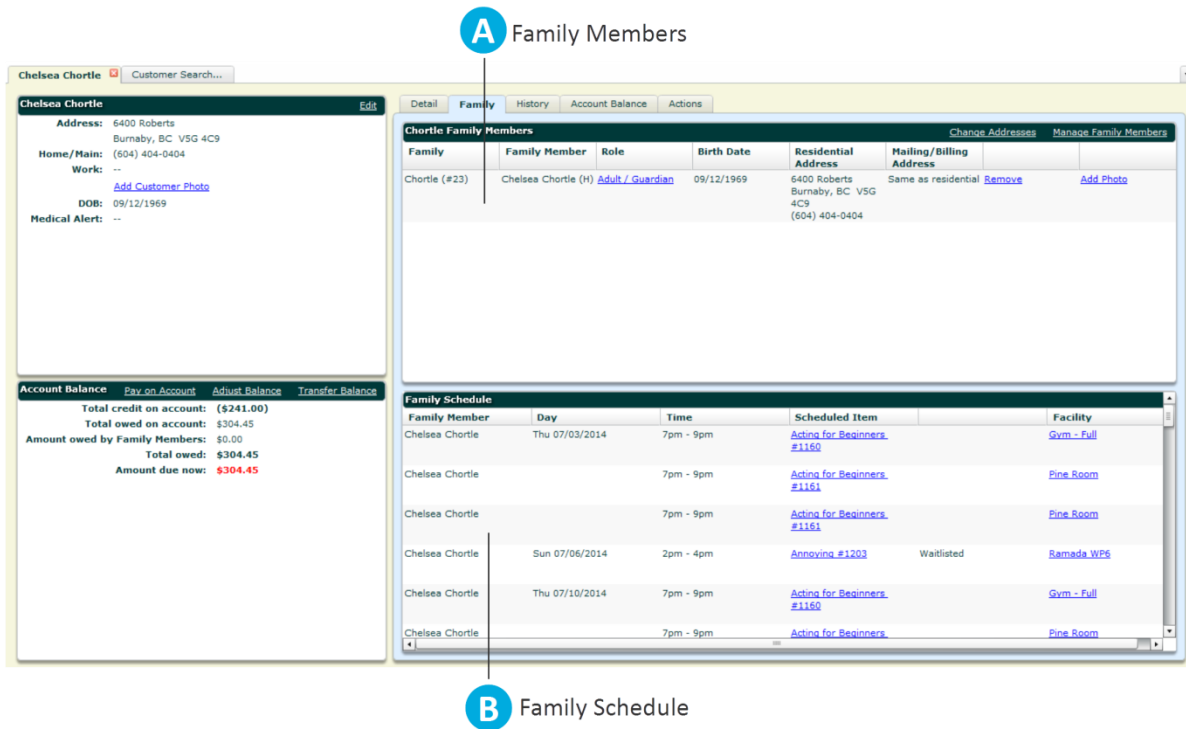
- A ECV tabs:** The customer tab contains areas and tabs that show information about a specific customer. The Customer Search tab stays open so that you can search for other customers while still keeping the current customer open in their own tab.
- B Customer summary:** This area displays basic information 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.
- D 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.

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



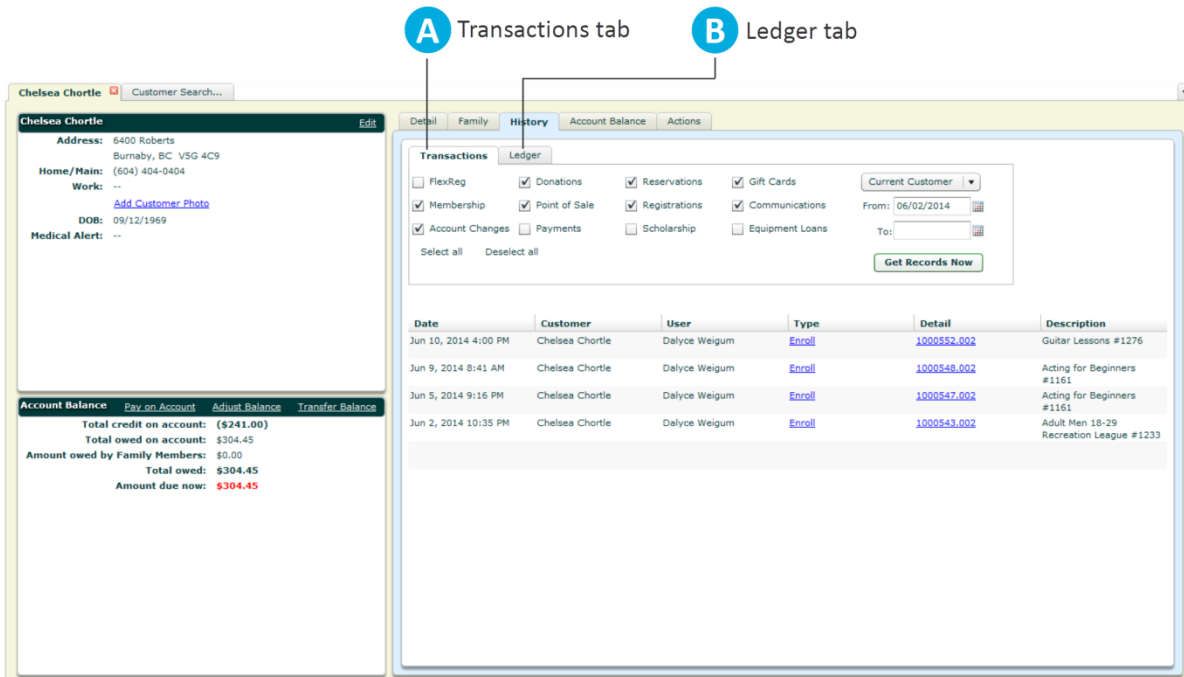
- A Upcoming Activities/FlexReg:** This area displays a list of the customer's upcoming activity and flexreg enrollments, along with links to view more about the activity/program, receipt, and location. This area also includes links to refund or transfer the enrollment and to create a new enrollment.
- 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.
- D 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.

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



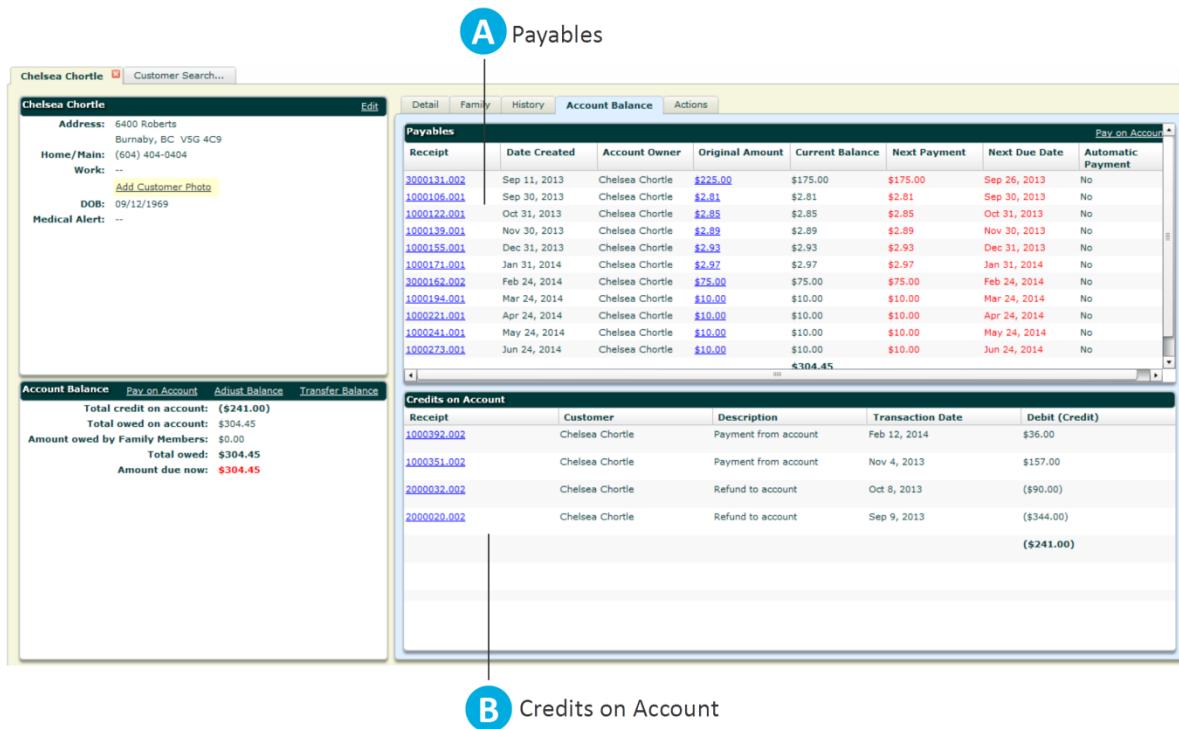
- A Family Members:** This area displays a list of the customer’s family members, along with links to edit each member.
- B Family Schedule:** This area displays a schedule of the family’s upcoming events, along with links to view more about scheduled events and facilities.

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



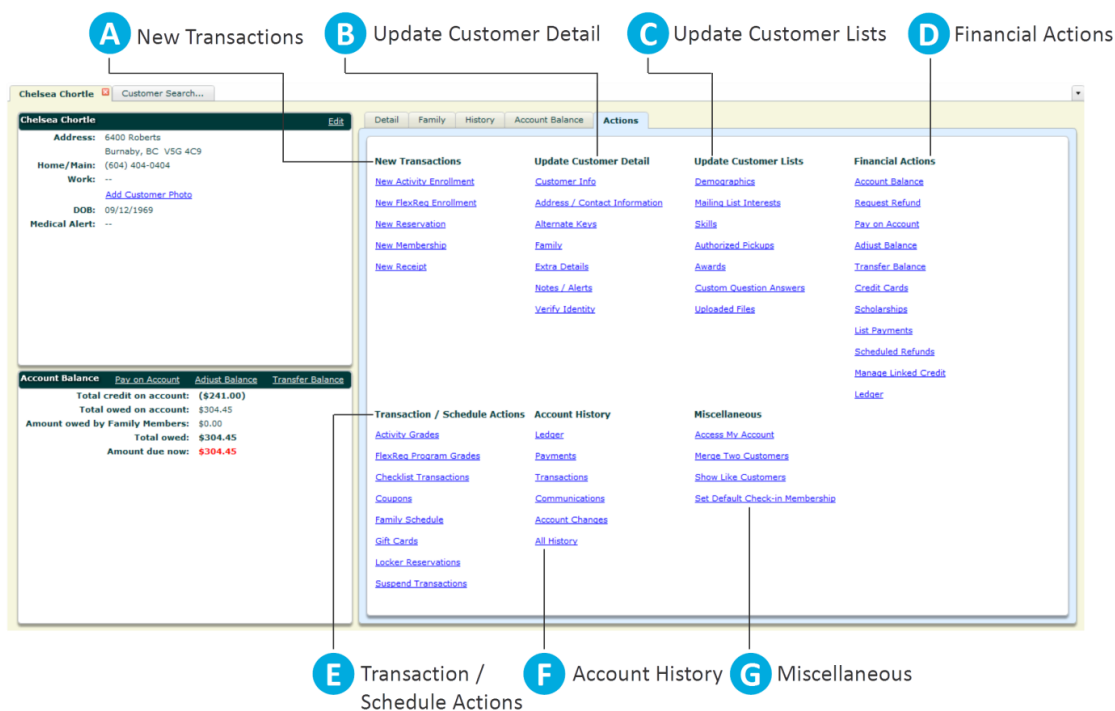
- A** **Transactions** tab: The Transactions tab displays a list of the customer’s transactions within a specific date range, along with links to view the associated receipts and transaction details.
- B** **Ledger** tab: The Ledger tab displays the list of charges that affect the customer’s account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

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.



- 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.

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.



- 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.
- B Update Customer Detail:** View or edit the basic information about this customer.
- C 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.
- D Financial Actions:** View or edit the financial parts of this customer's account, such as their credit cards, payment plans, and scheduled refunds.
- E 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.
- F Account History:** View the history of this customer's transactions, including their payments and communications.
- G Miscellaneous:** Sign in to the public site as this customer, or merge this customer with a duplicate customer.