ACTIVE Net Quick Reference Guide: Memberships

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network™

Sell memberships

1) Click the **Customers** banner tab
2) Enter customer search criteria and click **Search Now**
3) Click the name of the desired customer account
   Tip: If the customer is not found, click Add New Customer to create a new customer account and then ensure that it is the active tab
4) In the Actions tab of the Customer Account dashboard, click New Transactions>**New Receipt**
5) Click Membership>**Sell Membership**
6) Enter membership package search criteria and click **Search**
7) Click the name of the membership package to be sold
8) Review dates, auto-renewal method, and renewal payment information if applicable
9) Click **Submit**
10) If applicable, assign family members and click **Submit**
11) Review fees, check waivers, and answer questions if applicable
12) Click **Submit**
13) Click **Pay**
14) Select, search for, or add a customer for the transaction
15) Click the **$** next to the desired payment type
16) Click **Pay and Finish**
   Tip: To print the membership pass, click the pass number on the receipt to go directly to the Pass Production page

Print membership passes

1) Click the **Front Desk** banner tab
2) In the left navigation bar, click Membership>**Pass Production**
3) Scan card, enter customer search criteria, enter pass number, or enter customer ID number to search for the desired pass
4) Take the customer's photo for the pass by clicking **Select Camera**, then click **Take Picture**
5) Click **Print Pass** and select the card printer

Pass validation

1) Click the **Front Desk** banner tab
2) In the left navigation bar, click Membership>**Pass Validation**
3) Scan card, enter customer search criteria, enter pass number, or enter customer ID number to search for the desired pass
4) Review customer information and membership package selection
5) Click **Check In**

Renew memberships

1) Click the **Customers** banner tab
2) Enter customer search criteria and click **Search Now**
3) Click the name of the desired customer account
4) In the Current Memberships section of the Customer Account dashboard, find the membership to be renewed and click **Renew**
5) Enter the number of time periods to renew and verify the new expiration date
6) Click **Submit**
7) Follow steps 10-16 in "Sell memberships"

Change auto-renewal settings

Use this function when a customer wishes to begin, discontinue, or update auto-renewal payments

1) Click the **Front Desk** banner tab
2) In the left navigation bar, click Membership>**Inquiry**
3) Scan card, enter customer search criteria, enter pass number, or enter customer ID number to search for the desired pass
4) In the Automatic Renewal section, select the desired auto-renewal method
   - If selecting **Pay in full when renewal due** or **Use payment plan for renewal**, enter payment information under the Renewal Payment Information section
5) To the right of the Automatic Renewal section, click **Submit renewal changes**

Transfer memberships

1) Click the **Front Desk** banner tab

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2) In the left navigation bar, click Membership>**Inquiry**

3) Scan card, enter customer search criteria, enter pass number, or enter customer ID number to search for the desired pass

4) Click on the pass number of the membership package to be transferred

5) To the right of the Package section, click **Transfer packages**

6) Review fees and date for prorated refund

7) Click **Refund**

8) Follow steps 6-12 in "Sell memberships"

9) Click **Pay** if a payment is required or click **Refund** if a refund is being issued

10) Select, search for, or add a customer for the transaction

11) Click the **$** next to the desired payment type

12) Click **Pay and Finish** if a payment is required or click **Refund and Finish** if a refund is being issued

Refund/withdraw memberships

1) Click the **Customers** banner tab

2) Enter customer search criteria and click **Search Now**

3) Click the name of the desired customer account

4) In the Actions tab of the Customer Account dashboard, click New Transactions>**New Receipt**

5) Click Refund/Withdraw>**Refund Withdraw Transaction**

6) Click the name of the membership package to be refunded/withdrawn

7) Review fees and date for prorated refund

8) Click **Refund and Finish**

9) Select, search for, or add a customer for the transaction

10) Click the **$** next to the desired payment type

11) Click **Refund and Finish**

Suspend memberships

1) Click the **Front Desk** banner tab

2) In the left navigation bar, click Membership>**Inquiry**

3) Scan card, enter customer search criteria, enter pass number, or enter customer ID number to search for the desired pass

4) Click on the pass number of the membership package to be suspended

5) In the Suspend Membership section, enter the time frame and a reason for the suspension

> Tip: To extend a membership's expiration date for the same amount of time as the suspension, check the **Extend for Suspended Time** box

6) To the right of the Suspend Membership section, click **Submit changes to suspension**

Best practices for membership card photos

- Improve image quality by using a solid backdrop and proper lighting

- Warn customers so that they have the opportunity to smile

- For consistent results, set up a permanent photo station and mark an "X" where customers are to stand

- For black and white cards, photos will turn out better if customers stand against a light backdrop

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