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ActiveNet - City of Carlsbad

Welcome, Justin Goulet! Account ▾

**ACTIVENet**

City of Carlsbad

Front Desk Customers Organizations POS Reports Admin

Front Desk Menu

- ▶ Favorites
- ▶ FlexReg/Private Lessons
- ▶ Membership
- ▶ Population
- ▶ Receipts
- ▶ Refund
- ▶ Registrations
- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Front Desk × +

Pending Receipt #1

Pending Receipt #1 Help

Receipt Actions

- ▶ Registration
  - [Enroll](#)
  - [Enroll from Waiting List](#)
  - [Transfer](#)
- ▶ POS
  - [Sell](#)
- ▶ Reserve
  - [Reserve Facility](#)
  - [Schedule Reservations](#)
  - [Refund Payments](#)
- ▶ Refund/Withdraw
  - [Refund/Withdraw Transaction](#)
- ▶ Membership
  - [Renew Membership](#)
  - [Sell Membership](#)
- ▶ Account Actions
  - [Refund from Account](#)
  - [Pay on Account](#)
- ▶ Donation
  - [Make Donation](#)

Pay Finish Cancel



Task:

Open the "Customers" module



# Error!

Please Follow the On-Screen  
Instructions to Continue

Go Back

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Front Desk \* +  
Front Desk Home » Customers

Customer Search...

Customer Search Criteria

First Name	<input type="text"/>	Address	<input type="text"/>
Middle Name	<input type="text"/>	City	<input type="text"/>
Last Name	<input type="text"/>	State	<input type="text"/>
Sounds Like? <input type="checkbox"/>	Exact Match? <input type="checkbox"/>	Zip Code	<input type="text"/>
Family Name	<input type="text"/>	Phone	<input type="text"/>
Entered Since	<input type="text"/>	Cell Phone	<input type="text"/>
Include Retired? <input type="checkbox"/>		Email	<input type="text"/>

Search Now Clear Add New Customer



Task:

Select the "First Name" Text Field

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Front Desk \* +  
Front Desk Home » Customers

Help

Customer Search...

Customer Search Criteria

First Name	Justin	Address	
Middle Name		City	
Last Name		State	
Sounds Like?	<input type="checkbox"/>	Exact Match?	<input type="checkbox"/>
Family Name		Zip Code	
Entered Since		Phone	( ) - -
Include Retired?	<input type="checkbox"/>	Cell Phone	( ) - -
		Email	

Search Now Clear Add New Customer



Task:

Select the "Last Name" Text Field

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Front Desk \* +

Front Desk Home » Customers

Help

Customer Search...

Customer Search Criteria

First Name	Justin	Address	
Middle Name		City	
Last Name	Goulet	State	
Sounds Like?	<input type="checkbox"/>	Exact Match?	<input type="checkbox"/>
Family Name		Zip Code	
Entered Since		Phone	( ) - -
Include Retired?	<input type="checkbox"/>	Cell Phone	( ) - -
		Email	

Search Now Clear Add New Customer



Task:

Select the "Search Now" Button

Tip: Some buttons in this module are functional. Click others to play around!

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Front Desk \* +

Front Desk Home » Customers

Help

Customer Search...

Customer Search Criteria (1 record found)

First Name: Justin Address: \_\_\_\_\_

Middle Name: \_\_\_\_\_ City: \_\_\_\_\_

Last Name: Goulet State: \_\_\_\_\_

Sounds Like? ☐ Exact Match? ☐ Zip Code: \_\_\_\_\_

Family Name: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_-\_\_\_\_

Entered Since: \_\_\_\_\_ Cell Phone: (\_\_\_\_) \_\_\_\_-\_\_\_\_

Include Retired? ☐ Email: \_\_\_\_\_

Search Now Clear Add New Customer

Name	Address	Phone	Email	Date of Birth	Gender	Cust Type	Family	Customer Since	Retired?
Goulet, Justin A.		(H): -- (W): (760) 602-46	Justin.Goulet@car	06/20/1994	M	Individual	Goulet (#1324)	12/26/2013	No



Task:  
Select the Customer from the Results

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Front Desk \* +

Front Desk Home » Justin Goulet

Justin Goulet [X] Customer Search...

**Justin A. Goulet** [Edit]

**Address:**

**Email:** Justin.Goulet@carlsbadca.gov

**Family Role:** Adult / Guardian

**Gender:** Male

**Instructor?:** No

**(C):**

**(H):**

**(W):** (760) 602-4680

**Detail** Family History Account Balance Actions

**Customer Notes/Alerts** [Add]

No records found

**Upcoming Activities/FlexReg/Private Lessons** [New Activity Enrollment]

No records found

No records found

**Interests** [Add]

No records found



Task:  
Edit the Customers Information

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Front Desk \* +

Front Desk Home » Customer: Justin A. Goulet (#2902)

Customer Account Functions - Justin A. Goulet (#2902) Help

Customer List: [Back to List](#)

General Information

Customer Name Justin A. Goulet

Address

Phone

Cell Phone

Email Justin.Goulet@carlsbadca.gov

Login Name JUSTIN.GOULET@CARLSBADCA.GOV

Customer Since Dec 26, 2013

Family Goulet (#1324)

Online Account Lockout No

[Add / change image](#)

▶ Name and other Details

- [Change Details](#)
- [Change Address](#)
- [Change Family Details](#)
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▶ Transactions and Schedules

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▶ Actions

- [Access My Account](#)
- [Start New Receipt](#)
- [Verify Identity](#)
- [Set Default Membership for Check-in](#)

▶ Customer History

- [View Customer Ledger](#)
- [View Payment History](#)
- [View Transaction History](#)
- [View Communication History](#)
- [View Account Change History](#)
- [View All History](#)



Task:

Change the Details of the Client



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Front Desk \* +

Front Desk Home » Customer: Justin A. Goulet (#2902) » Customer Details

**Change Customer Details - Justin A. Goulet (#2902)** Help

[Cancel and go back to Customer Account Functions](#)

\* - required field

**Name**

First\* Justin Middle A. Last\* Goulet

Address

**Personal Information**

Gender\* Male

Date of Birth\* Jun 20, 1994

Customer Type\* Individual

Grade Override as of Dec 1, 2016

External ID - External Description

☐ Retire Customer Record? ☐ Special Handling?

☐ Head of Household? ☐ Membership Overusage?

**Notes**

Notes

General Alert(Staff Use Only)



Task:

Change the Client's Birthday

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- ▶ Help Center
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Front Desk \* +

Front Desk Home » Customer: Justin A. Goulet (#2902) » Customer Details

Change Customer Details - Justin A. Goulet (#2902) Help

[Cancel and go back to Customer Account Functions](#)

\* - required field

**Name**

First\* Justin Middle A. Last\* Goulet

Address

**Personal Information**

Gender\* Male

Date of Birth\* Jun 20, 1994

Customer Type\*

Grade Override

External ID

Handling?

ship Overusage?

**Notes**

Notes

General Alert(Staff Use Only)



Task:

Change it to June 1, 1994

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- Active Support

Front Desk x

Front Desk Home » Customer: Justin A. Goulet (#2902) » Customer Details

Change Customer Details - Justin A. Goulet (#2902) Help

[Cancel and go back to Customer Account Functions](#)

\* - required field

**Name**

First\* Justin Middle A. Last\* Goulet

Address

**Personal Information**

Gender\* Male

Date of Birth\* Jun 1, 1994

Customer Type\* Individual

Grade Override as of Dec 1, 2016

External ID External Description

☐ Retire Customer Record? ☐ Special Handling?

☐ Head of Household? ☐ Membership Overusage?

**Notes**

Notes

General Alert/Staff



Task:

Add Note for Birthday Change

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**City of Carlsbad**

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Front Desk \* +

Front Desk Home » Customer: Justin A. Goulet (#2902) » Customer Details

**Change Customer Details - Justin A. Goulet (#2902)**

[Cancel and go back to Customer Account Functions](#)

\* - required field

**Name**

First\* Justin Middle A. Last\* Goulet

Address

**Personal Information**

Gender\* Male

Date of Birth\* Jun 1, 1994

Customer Type\* Individual

Grade Override as of Dec 1, 2016

External ID - External Description

☐ Retire Customer Record? ☐ Special Handling?

☐ Head of Household? ☐ Membership Overusage?

**Notes**

Notes Birthday changed to Jun 1, 1994 from Jun 1, 2016

General Alert(Staff Use Only)

[Linked Organizations](#)

Save and Attach New Organization Save and Add a New Family Member Save Delete

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Task

Save  
Changes

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Front Desk \* +

Front Desk Home » Customer: Justin A. Goulet (#2902)

Customer Account Functions - Justin A. Goulet (#2902) Help

Customer List: [Back to List](#)

General Information

Customer Name Justin A. Goulet

Address

Phone

Cell Phone

Email Justin.Goulet@carlsbadca.gov

Login Name JUSTIN.GOULET@CARLSBADCA.GOV

Customer Since Dec 26, 2013

Family Goulet (#1324)

Online Account Lockout No

[Add / change image](#)

▶ Name and other Details

- [Change Details](#)
- [Change Address](#)
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- [Change Note / Alert](#)

▶ Customer Lists

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▶ Actions

- [Access My Account](#)
- [Start New Receipt](#)
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▶ Customer History

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Task:

Open the "Front Desk" Module

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- ▶ Help Center
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Front Desk × +

Pending Receipt #1

Pending Receipt #1 Help

Receipt Actions

▶ Registration	▶ Reserve	▶ Membership	▶ Donation
<a href="#">Enroll</a> <a href="#">Enroll from Waiting List</a> <a href="#">Transfer</a>	<a href="#">Reserve Facility</a> <a href="#">Schedule Reservations</a> <a href="#">Refund Payments</a>	<a href="#">Renew Membership</a> <a href="#">Sell Membership</a>	<a href="#">Make Donation</a>
▶ POS	▶ Refund/Withdraw	▶ Account Actions	
<a href="#">Sell</a>	<a href="#">Refund/Withdraw Transaction</a>	<a href="#">Refund from Account</a> <a href="#">Pay on Account</a>	

Pay Finish Cancel



Task:

You are Done!

Exit this Module Now to Continue the Course