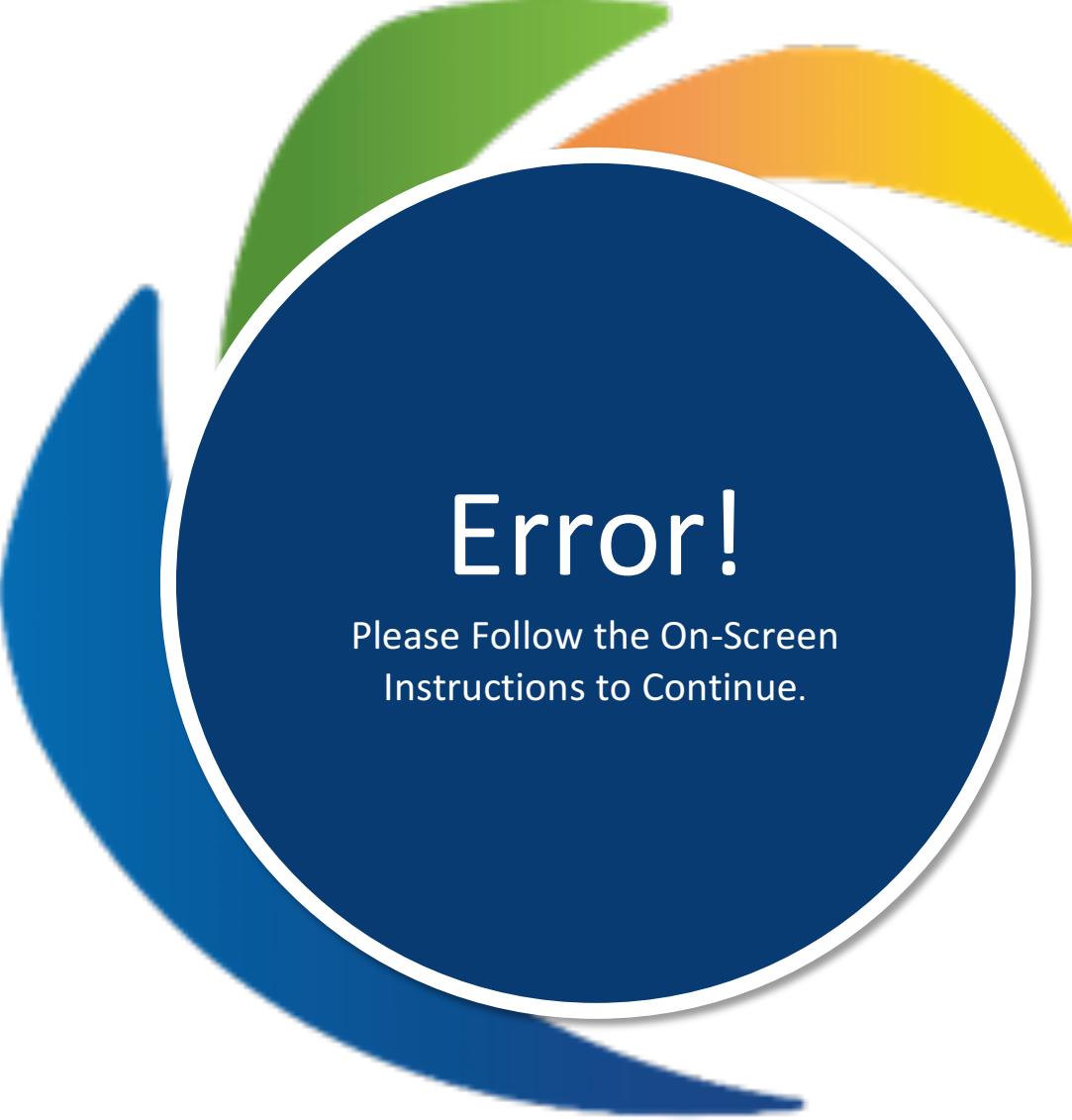




Customer Modification

This next tutorial will walk you
through the steps to change a
birthday for a client.

[Click to Begin](#)



Error!

Please Follow the On-Screen
Instructions to Continue.

Back



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



Front Desk × +

Pending Receipt #1

Help

Pending Receipt #1
Receipt Actions

- ▶ Registration
 - [Enroll](#)
 - [Enroll from Waiting List](#)
 - [Transfer](#)
- ▶ Refund/Withdraw
 - [Refund/Withdraw Transaction](#)
- ▶ Membership
 - [Renew Membership](#)
 - [Sell Membership](#)
- ▶ POS
 - [Sell](#)

- ▶ Account Actions
 - [Refund from Account](#)
 - [Pay on Account](#)
- ▶ Donation
 - [Make Donation](#)

Trainer Site [Pay](#) [Finish](#) [Cancel](#)Tip:Open the *Customers* module

The screenshot shows the ACTIVENet City of Carlsbad Front Desk application. The top navigation bar includes links for Front Desk, Customers, Organizations, POS, Reports, and Admin. The left sidebar contains a Front Desk Menu with options like Favorites, FlexReg/Private Lessons, Membership, Population, Receipts, Refund, Registrations, Reserve, Help Center, and Active Support. The main content area is titled "Customer Search..." and displays a form for searching customers. The form fields include First Name, Middle Name, Last Name, Sounds Like? (checkbox), Exact Match? (checkbox), Family Name, Entered Since (date picker), Address, City, State (dropdown), Zip Code, Phone, Cell Phone, Email, and Include Retired? (checkbox). Below the form are buttons for Search Now, Clear, and Add New Customer.

Tip:

*Select the **First Name** field*



Front Desk x Help

Front Desk Home » Customers

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:	

Buttons: Search Now, Clear, Add New Customer

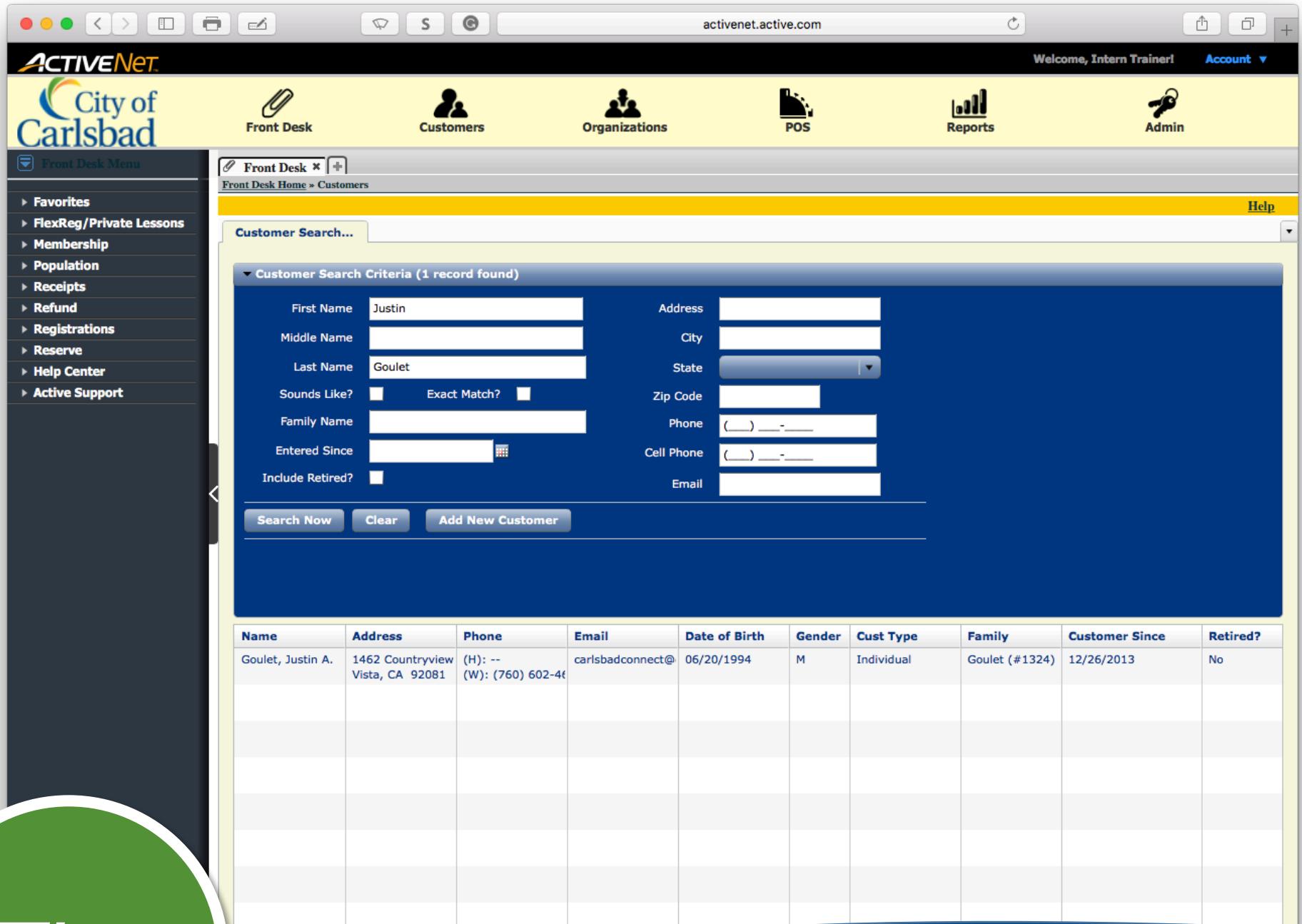
Tip:

Select the Last Name field

The screenshot shows the ACTIVENet software interface for the City of Carlsbad. The top navigation bar includes links for Front Desk, Customers, Organizations, POS, Reports, and Admin. The main content area is titled "Customer Search..." and displays a form for searching customers. The search criteria include fields for First Name (Justin), Middle Name, Last Name (Goulet), Sounds Like? (checkboxes for Exact Match? and Fuzzy Match?), Family Name, Entered Since, Address, City, State (dropdown menu), Zip Code, Phone, Cell Phone, Email, and Include Retired? (checkbox). Below the form are buttons for "Search Now", "Clear", and "Add New Customer".

Tip:

*Select the **Search Now** button*



The screenshot shows the ACTIVENet City of Carlsbad software interface. The top navigation bar includes links for Front Desk, Customers, Organizations, POS, Reports, and Admin. The left sidebar contains a Front Desk Menu with options like Favorites, FlexReg/Private Lessons, Membership, Population, Receipts, Refund, Registrations, Reserve, Help Center, and Active Support. The main content area is titled "Customer Search..." and displays search criteria for a customer named "Justin Goulet". The search results table shows one record:

Name	Address	Phone	Email	Date of Birth	Gender	Cust Type	Family	Customer Since	Retired?
Goulet, Justin A.	1462 Countryview Vista, CA 92081	(H): -- (W): (760) 602-46	carlsbadconnect@	06/20/1994	M	Individual	Goulet (#1324)	12/26/2013	No

Tip:

Select the Customer from the list

The screenshot shows the ACTIVENet City of Carlsbad software interface. At the top, there's a navigation bar with icons for Front Desk, Customers, Organizations, POS, Reports, and Admin. The main content area is titled "Front Desk" and shows a customer profile for "Justin A. Goulet". The profile includes details like Address (1462 Countryview Lane, Vista, CA 92081), Email (carlsbadconnect@carlsbadca.q), Family Role (Adult / Guardian), Gender (Male), Instructor? (No), and contact numbers (C: (760) 221-2699, H: --, W: (760) 602-4680). Below the profile are sections for "Customer Notes/Alerts" (No records found), "Upcoming Activities/FlexReg/Private Lessons" (New Activity Enrollment, No records found), and "Interests" (No records found). On the left, a sidebar menu lists various options: Favorites, FlexReg/Private Lessons, Membership, Population, Receipts, Refund, Registrations, Reserve, Help Center, and Active Support. A green circle on the left contains the word "Tip:".

Tip:

Edit the Customer's Information

ACTIVENet

Welcome, Intern Trainer! Account ▾

Front Desk Customers Organizations POS Reports Admin

Front Desk x +

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: 1462 Countryview Lane
Vista, CA 92081
Phone: Home: --
Work: (760) 602-4680
Cell Phone: (760) 221-2699
Email: carlsbadconnect@carlsbadca.gov
Login Name: carlsbadconnect@carlsbadca.gov
Customer Since: Dec 26, 2013
Member Since: Sep 7, 2016
Family: Goulet (#1324)
Online Account Lockout: No

Add / change image

Name and other Details

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

Customer Lists

- [Change Demographics](#)
- [Change Interest List](#)
- [List Awards](#)
- [List Custom Questions](#)
- [List Uploaded Files](#)

Financial Information

- [Account Balance](#)
- [Pay on Account](#)
- [Saved Credit Cards](#)
- [List Payment Setup](#)

Transactions and Schedules

- [List Activity Grades](#)
- [List Checklist Transactions](#)
- [List Family Schedule](#)
- [List Program Grades](#)
- [List Scheduled Refunds](#)

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](#)

Tip:

Change the Details of the client

ACTIVENet

Welcome, Intern Trainer! Account ▾

Front Desk Customers Organizations POS Reports Admin

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

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

* required field

Name

First* Justin Middle A. Last* Goulet

Address 1462 Countryview Lane Vista, CA 92081

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?

Security Information

The login name will not be saved when the setting "Force login name to be the email address?" is ON in System Setting - Online.

Note: Login can only be created for customers 13 years of age or older

Login Name carlsbadconnect@carlsbad

Password
(min 8 characters)

Re-enter Password

Question What street did you live on as a child? Change question

Answer

Re-enter Answer

Tip:

Change the client's birthday

ACTIVENet

Welcome, Intern Trainer! Account ▾

Front Desk Customers Organizations POS Reports Admin

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

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

* - required field

▶ Name

▶ Personal Information

Gender* Male Date of Birth* Jun 20, 1994 

Customer Type* Grade Override External ID External Description

Jun 20, 1994

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

▶ Security Information

▶ Notes

▶ Linked Organizations

City Of Carlsbad: Calavera Hills
City Of Carlsbad: Stagecoach

Attach a organization
Detach selected organization(s)

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



Tip:

Change the Birthday to June 1, 1994

ACTIVENet

Welcome, Intern Trainer! Account ▾

Front Desk Customers Organizations POS Reports Admin

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

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

* required field

▶ Name

▼ 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?

▶ Security Information

▼ Notes

Notes General Alert(Staff Use Only)

▶ Linked Organizations

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



Tip:

Click to add a **Note** for the birthday change

Tip:

Click to Save your Changes

Front Desk Customers Organizations POS Reports Admin

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](#) [Help](#)

* - required field

Name

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?

Security Information

Notes

Notes Birthday changed to June 1, 1994 from June 20, 1994 on September 1, 2014 by JGOUL

General Alert(Staff Use Only)

Linked Organizations

[Save and Attach New Organization](#) [Save and Add a New Family Member](#) [Save](#) [Delete](#)

The screenshot shows the ACTIVENet City of Carlsbad Front Desk module. The top navigation bar includes links for Front Desk, Customers, Organizations, POS, Reports, and Admin. The main content area displays customer details for "Justin A. Goulet" (Customer #2902). The left sidebar contains a "Front Desk Menu" with links to Favorites, FlexReg/Private Lessons, Membership, Population, Receipts, Refund, Registrations, Reserve, Help Center, and Active Support. The right side of the screen shows sections for Customer Notes/Alerts, Upcoming Activities/FlexReg/Private Lessons, and Interests, all reporting "No records found".

Tip:

Open the Front Desk module



Complete!

Please Navigate to the next module
within this course to continue.

[Start Over](#)