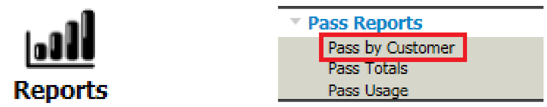
REPORTS – ASSOCIATION MEMBERSHIP LISTS - HELP GUIDE

Pass by Customer - Membership Sold as a Pass

The Pass by Customer report lists customers and their membership packages. For each customer, the report includes the customer name, member number, membership packages owned, pass number, membership expiration date, and any amount due on the account.

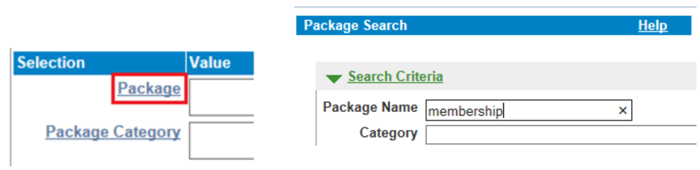
Access Pass by Customer Report

1. Click the **Reports** icon
2. Click **Pass Reports** drop down on the left-hand side.
3. Select **Pass by Customer**



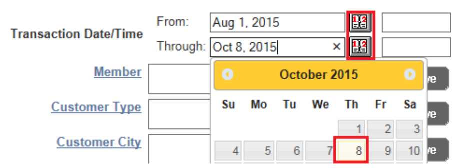
Filter by Membership Package

4. Click **Package** link. This will open a new page.
5. Type ***Membership*** into the Package Name Field and click **Search**
6. Check box next to Membership Passes. Multiple can be selected.
7. Scroll to bottom of page and click **Done.** The page will close.



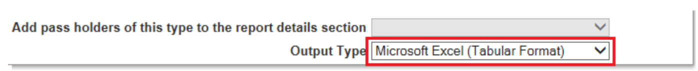
Filter by Transaction Date/Time

8. Click on the calendar icons and select dates to set Transaction date range.



Options

9. **Output Type:** Select **MS Excel (Tabular Format)**



Produce Report

10. Click **Run Report**

How to read the report

Report is produced in tabular format.

- **Member Name:** (p) indicates primary pass holder
- **Pass:** Sequential number based on pass sales in ActiveNet
- **Pass #:** Customer's Pass Number
- **Res:** Customer is a Resident or Non-Resident **(Not in Use)**

For more information or to get assistance, please contact us at:

- 3-1-1 (within Vancouver)
- 604-873-7000 (outside of Vancouver)

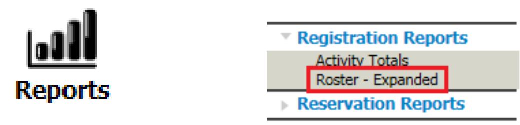
REPORTS – ASSOCIATION MEMBERSHIP LISTS - HELP GUIDE

Roster Expanded - Membership sold as an Activity Enrollment

The Roster report displays a standard activity roster with activity information and basic enrollee information with payments.

Access Roster - Expanded Report

1. Click the **Reports** icon
2. Click **Registration Reports** drop down on the left-hand side.
3. Select **Roster - Expanded**

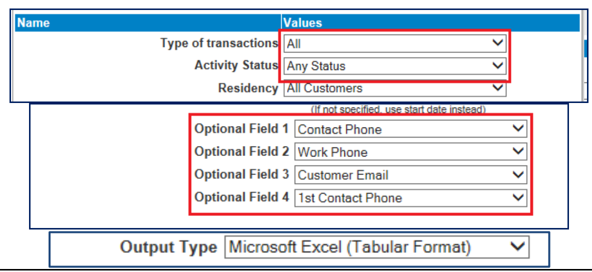


Filter by Membership Activity

4. Click **Activity** link. This will open a new page.
5. Type ***Membership*** into Activity Name field and click **Search.**
6. Check box next to CCA Membership Activity. Multiple can be selected.
7. Scroll to bottom of page and click **Done.** The page will close.

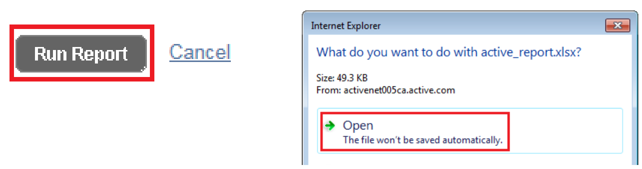
Options

8. **Type of transactions:** Select **All**
9. **Activity Status:** Select **Any Status**
10. **Optional Fields:** Select information to include on report
11. **Output Type:** Select **MS Excel (Tabular Format)**



Produce Report

12. Click **Run Report**
13. A prompt will appear asking what you want to do with the file.
14. When prompted, click **Open**.



How to read the report

Report is produced in tabular format.

- **#:** Sequential number counting total number of enrollments (not enrollment entry order)
- **Retired?:** Customer account is active or retired
- **Qty:** Number of times the customer is enrolled into the activity
- **Resident?:** Customer is Resident or Non-Resident **(Not in Use)**

Fields not in use:

- **Holds**
- **Team Placeholders**
- **Area**
- **Team Name**
- **Grade**

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ACTIVENet

REPORTS – ASSOCIATION MEMBERSHIP LISTS - HELP GUIDE

Roster Expanded - Automatic Membership when enrolling into any activity

The Roster report displays a standard activity roster with activity information and basic enrollee information with payments. ***Note: This report must be run for each page of activities offered by the site and the Excel files combined. As customers can be enrolled into multiple activities, any multiple entries should be deleted from the final list.***

If you find producing this report is slow, please contact community centre staff and ask them to create the membership list using File Export. Instructions on producing this additional report have been provided to community centre staff.

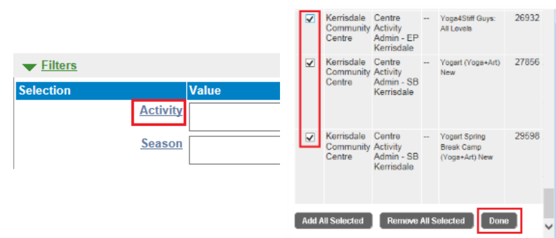
Access Roster - Expanded Report

1. Click the **Reports** icon
2. Click **Registration Reports** drop down on the left-hand side.
3. Select **Roster - Expanded**

Filter by Activity

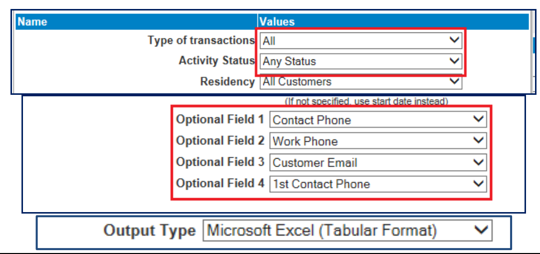
4. Click **Activity** link. This will open a new page.
5. Scroll to the bottom of page and click **Search.**
6. Check box underneath **Select** to select all activities on the page.
7. Scroll to bottom of page and click **Done.** The page will close.

Note: **Activity Site** will be automatically selected.



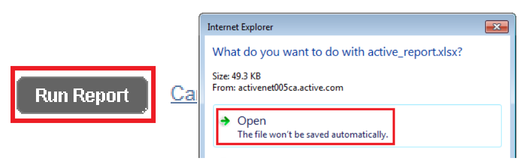
Options

8. **Type of transactions:** Select from drop-down
9. **Activity Status:** Select **Any Status**
10. **Optional Fields:** Select information to include on report
11. **Output Type:** Select **MS Excel (Tabular Format)**



Produce Report

12. Click **Run Report**
13. A prompt will appear asking what you want to do with the file.
14. Click **Open**. The file will open in Excel.



How to read the report

Report is produced in tabular format.

- **#:** Sequential number counting total number of enrollments (not enrollment entry order)
- **Retired?:** Customer account is active or retired
- **Qty:** Number of times the customer is enrolled into the activity
- **Resident?:** Customer is Resident or Non-Resident **(Not in Use)**

Fields not in use:

- **Holds**
- **Team Placeholders**
- **Area**
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