



Pass Validation User Guide  
(v1)



## ACTIVE Network, LLC

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## Pass validation overview

The new **Pass Validation** page has been updated with a new layout that includes more relevant information about your valid and invalid member scans. The new **Pass Validation** layout makes it easier to manage your invalid member scans and view a history of members who have scanned in during the day.

The new **Pass Validation** page combines the previous staff site pass validation page together with the existing Entry Point background scanning application to make a single unified interface that supports both scanning methods.

If your staff currently uses the **Pass Validation** page on the staff site to validate pass scans, then no configuration changes are needed for the pass validation process to work as before. Staff will notice a layout change on the **Pass Validation** page as described below, but they will be able to perform the same actions as before.

If your staff currently uses the Entry Point background scanning application to validate pass scans, then no configuration changes are needed for the pass validation process to work as before. However, you will now have the option to use the new Pass Validation page to view and track pass scans that were previously handled by the Entry Point background scanning application. See the [Scanning Methods](#) section below for more information.

The new **Pass Validation** page supports the same scanning hardware as previous versions of ACTIVE Net.

## Location

Access the **Pass Validation** page at **Front Desk > Membership > Pass Validation**.

## Overall layout

Pass Validation - Front desk

Scan Card Submit Customer Search

**Invalid Members** 1

Claire Smith

**Claire Smith**

Age: 18 - 99  
Gender: --  
Customer ID: 11528  
Member Since: Aug 3, 2014  
Last Scan: Aug 18, 2015

SELECT	PACKAGE	STATUS	EFFECTIVE	EXPIRATION	USES	LAST RENEWED	LAST CHECK IN	LAST CHECK OUT
<input type="checkbox"/>	Standard Package 1	Active	Aug 3, 2015	Sep 3, 2015	No limit	--	Aug 18, 2015 2:49	Aug 18, 2015 2:50

Pass is not valid at this entry point at this time.

**Valid Members** 2

**Claire Coleman**

Age: 55  
Gender: Female  
Last Scan: Aug 20, 2015

Yoga club

**Front desk | 4 Scans** 3 Last Updated 3:16

DATE TIME	CUSTOMER NAME	PACKAGE NAME	STATUS
Aug 20, 2015 3:16	Claire Smith	Standard Package 1	Invalid
Aug 20, 2015 0:26	Judy Jobs	Swimming club	Invalid
Aug 20, 2015 0:26	Claire Coleman	Yoga Club	Close to Expiry

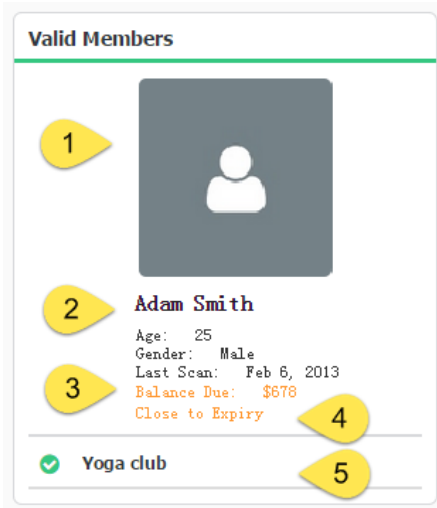
The layout of the **Pass Validation** page is illustrated above:

1. Invalid Members area
2. Valid Members area
3. Scan history area

**Note:** You can show or hide specific customer information on the new **Pass Validation** page in the same way as on the previous **Pass Validation** page. To show or hide specific customer information:

1. Go to **Administration > Membership Settings > Entry Points**.
2. Select an entry point.
3. In the **Display Fields** section, enable the fields that you want to display, and clear the fields that you want to hide.
4. Click **Save**.

## Valid Members area



When a customer scans a valid pass, the customer's image, name, and package name displays in the top right of the **Pass Validation** page.

This information remains on the page until replaced by another valid customer scan. There is no longer a countdown function that removes this information from the page after a specific time period.

## Valid Members area layout

The **Valid Members** area includes the following elements:

1. Customer image
2. Customer information: name, age, gender, last scan time.
3. **Balance**: Displays the customer has an account balance if any.
4. **Membership information**: Displays if this membership is close to expiry or has only one punch left. A membership is close to expiry if it is within the time period that you have specified at **Administration > Membership Settings > Configuration > Scanning Sounds** section > **Pass Expiry within number Days**. If you have not specified a scanning sound, then the "Close to expiry" message is not displayed.
5. **Valid memberships**: Displays all of the customer's valid memberships or alternate keys display.

## Multiple valid membership packages scan

If you have enabled the Multi Valid Packages Scan function, you can select one membership package to check in if the customer has multiple valid memberships.

Note:

For Team Axxess devices, the current ACTIVE Net version does NOT support the open gate function with Multi Valid Packages Scan.

To enable the Multi Valid Packages Scan function:

- Go to **Administration Home > Membership Settings > Entry Points > Change Entry Point Detail > General** section and select the **Prompt for Package Selection** radio box for **Multi Valid Packages Scan Options**.

### Multi Valid Packages Scan Options

Auto Validation

Prompt for Package Selection

Popup Confirmation Timeout in  seconds

- Once the **Prompt for Package Selection** radio box is selected, you can set the countdown time in **Popup Confirmation Timeout in <> seconds**. It is 10 seconds by default.

To alert staff users to select a package for a Multi Valid Packages Scan event, see [Configure membership validation sound events](#).

In the Valid Members area, if the Multi Valid Packages Scan Options is enabled and the scanned customer account has multiple valid membership packages, then you can select one membership package and click **Check In**.

If you do not select a membership within the **Popup confirmation Timeout in <X> seconds** time, then the default membership package is automatically selected.

The screenshot shows a 'Valid Members' interface. At the top, there is a photo of a man and his name 'Aiden Smith'. Below the name, his details are listed: Age: 23, Gender: Male, Last Scan: Aug 18, 2015. Underneath, there is a list of membership packages with radio buttons for selection:

- Yoga club (Uses: 351 / 500)
- Swimming club (Uses: No limit)
- Gym monthly pass (Uses: No limit)

At the bottom of the interface, there is a timer showing '8 s' and a 'Check In' button.

## Quick family membership check-in/out

If you have enabled the quick family membership check-in/out function, you can check in/out other family members who share the same valid family membership package.

Note:

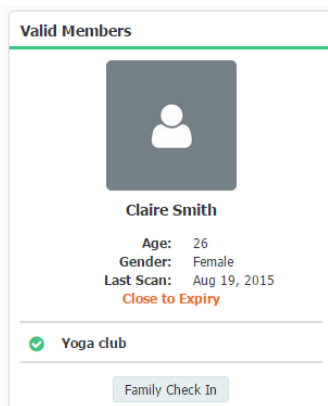
For Team Axxess devices, the current ACTIVE Net version does NOT support the open gate function with Quick Family Membership Check-in/out.

To enable quick family membership check-in/out:

- Go to **Administration Home > Membership Settings > Entry Points > Change Entry Point Detail > General** section and select the “**Allow Quick Family Membership Check-in/out?**” check box.




Use Quick Family Membership Check-in/out:

1. Open the **Pass Validation** page and scan the pass card.
2. If there is more than one valid membership package, select the family membership package.



3. Click the **Family Check In** button.

Choose Family Members ✕

	<b>Claire Smith</b> Age: 26 Gender: Female Last Scan: Aug 19, 2015	
	<b>Mary Smith</b> Age: 55 Gender: Female Last Scan: Aug 13, 2015	<input checked="" type="checkbox"/>
	<b>David Smith</b> Age: 27 Gender: Male Last Scan: Aug 13, 2015	<input type="checkbox"/>

Package: Yoga club | Unlimited Uses [Check In](#)

4. Select the family members and Click the **Check In** button.

## Invalid Members area

**Invalid Members**

Jake Smith

Mary Armstrong

**Joe Alam** 8 ✕

**Joe Alam** 1

Age: 2  
 Gender: Female  
 Customer ID: 1810  
 Member Since: Aug 3, 2015  
 Last Scan: Aug 4, 2015  
 Balance Due: \$130.00 2

Medical Alerts: Yes, allergy 3  
 General Alerts: None 4

SELECT	PACKAGE	STATUS	EFFECTIVE	EXPIRATION	USES	LAST RENEWED	LAST CHECK
<input checked="" type="radio"/>	Yoga Club	Active	Aug 3, 2015	Nov 9, 2015	70 / 70	Aug 24, 2015	--

Pass is not valid at this entry point at this time

Cancel 6 7 Check In

When a customer scans an invalid pass, their customer and package information displays in the top left of the **Pass Validation** page. This information remains on the page until you either click **Cancel** or you click **Check In** to manually check in the customer regardless of their invalid pass.

If multiple invalid scans occur before you can process them, then each invalid name displays in a tab on the left. Click each tab and dismiss or check in at your convenience.

If there are no scans or all invalid scans have been cancelled or checked in, then **No Invalid Members** is displayed..

The **Invalid Members** area includes:

1. **Customer information:** Displays information about the customer and their pass. Click the customer's name to open the **Customer Account Functions** page for that customer in a new tab.

**Note:** **ID** corresponds to the customer ID. **Identifier ID** corresponds to the membership or alternate key ID for this customer.

2. **Balance Due:** Displays **Balance Due** for the customer. Click **Balance Due** to open the **Balance** page in a new tab. If there is no balance due, no information appears here.
3. **Customer Notes/Alerts:** Displays valid notes or alerts linked to this customer if any. Click **Customer Notes/Alerts** to open the Customer Account Functions page in a new tab.
4. **Error messages:** If this customer has a balance for this membership package that is too large, an error message displays.

Note: A membership package balance is too large if it exceeds the amount that you have specified at **Administration > Membership Settings > Configuration > Auto Renewal** section > **Warn attendant if customer owes amount or more and the balance has been owing for** number **days or more**.

5. **Packages:**
  - If this customer has any packages, they are listed in this area. Click a package name to view the **Membership Admin** page for the package.
  - If this customer does not have any current packages, an error message displays and the **Check in** button disappears.
6. **Cancel:** Click **Cancel** to clear this customer's information from the **Pass Validation** page. The customer is denied entry.
7. **Check in:** Click **Check in** to allow this customer entry regardless of their invalid status. If this customer has multiple invalid packages, then before clicking **Check In**, select the radio button next to the package to validate.
8. **Tags:** Displays the name of each invalid customer who is not yet checked in or cancelled. Click the customer's name to view the page. Click the **X** next to a customer's name to quickly cancel the customer's validation attempt.

## Scan history area

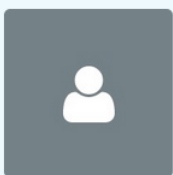
▼ Front Desk entry point   3 Scans			Last Updated 2:05 AM
DATE TIME	CUSTOMER NAME	PACKAGE NAME	STATUS
Oct 1, 2015 11:05 AM	Eddison Smith	Yoga club	Invalid
Oct 1, 2015 10:30 AM	Dan Craig	Swimming club	Close to Expiry
Oct 1, 2015 10:23 AM	Bobby Green	Fitness Membership Adult - 1 Year	Invalid

Recent scans displays at the bottom of the **Pass Validation** page. All **Valid** and **Invalid** scans for the current day for your entry point are shown. System users are now able to see scans from all workstations and Entry Point servers using the same entry point.

**Note:** When the Pass Validation page is open, scans from Entry Point servers are recorded in scan history. If not, scans are not recorded in scan history.

To sort the list of scans by status or by time, click the **STATUS** or **DATE TIME** column header.

To view details for a scan, click any row in the list. The row will expand to display customer and package information.

▼ Front Desk entry point   3 Scans			Last Updated 2:05 AM				
DATE TIME	CUSTOMER NAME	PACKAGE NAME	STATUS				
Oct 1, 2015 11:05 AM	Eddison Smith	Yoga club	Invalid				
Oct 1, 2015 10:30 AM	Dan Craig	Swimming club	Close to Expiry				
Oct 1, 2015 10:23 AM	Bobby Green	Fitness Membership Adult - 1 Year	Invalid				
<div style="display: flex; align-items: flex-start;"> <div style="flex: 1;">  </div> <div style="flex: 2;"> <p><b>Name</b> Bobby Green <span style="float: right;"><b>Customer Since</b> Aug 6, 2015</span></p> <p><b>Type</b> Membership2 <span style="float: right;"><b>Member Since</b> Aug 10, 2015</span></p> <p><b>ID</b> 125306</p> <p><b>Identifier ID</b> 000013471</p> <p><b>Gender</b> Male</p> <p><b>Age</b> 21</p> <p><b>Birth Date</b> Sep 4, 1994</p> <p><b>Primary2 Tel</b> (301) 221-7946</p> <p><b>Primary2 Tel</b> --</p> <p><b>Cell2 Tel</b> --</p> <p><b>Address</b> 4th Avenue CT Damascus, MD 31892</p> </div> </div>							
PACKAGE	STATUS	EFFECTIVE	EXPIRATION	USES	LAST RENEWED	LAST CHECK IN	LAST CHECK OUT
Fitness Membership Adult - 1 Year	Active	Aug 10, 2015	Mar 18, 2016	No limit	--		
Pass is not valid at this entry point at this time							

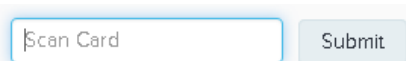
## Scanning methods

If you already use the **Pass Validation** page on the staff site, then you do not need to make any configuration changes to use the staff site **Pass Validation** page with the new layout.

Refer to one of the following sections for more information for your scanning method.

### Scanning with a keyboard input/keyboard wedge scanner on the Pass Validation page

If you currently validate passes using a keyboard input/keyboard wedge scanner, then you do not need to make any configuration changes to continue scanning passes on the new **Pass Validation** page:



The image shows a user interface element consisting of a text input field with the placeholder text "Scan Card" and a "Submit" button to its right. The input field has a light blue border and a small cursor icon on the left side.

- When you open the **Pass Validation** page, the cursor automatically focuses in the **Scan Card** box at the top right of the page. You can scan customer passes immediately.
- If the scanned number is linked to a valid membership package, then the customer appears in the **Valid Members** area. If the customer's membership package is not valid at the current entry point, then the customer appears in the **Invalid Members** area.
- The cursor remains in the **Scan Card** box after each scan, so you can continue to scan customers one after another. As long as you do not click elsewhere and move the focus from the **Scan Card** box, subsequent scans will complete successfully.
- If you need to work elsewhere on the page or in another tab, click the **Scan Card** box to restore focus and continue scanning. This process works in the same way as in the previous layout.
- You can also use the keyboard to manually enter a customer card number in the **Scan Card** box and then either press Enter or click Submit.

### Scanning using the Entry Point service

If you currently validate passes using the Entry Point background scanning application, then no configuration changes are required to continue scanning passes as before.

If you want to use the new **Pass Validation** page to view and manage scans that made with the Entry Point background scanning application, then you must first:

1. Install the Entry Point server on the workstation on which you will view the **Pass Validation** page.

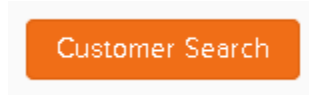
**Note:** Install the most recent version of the Entry Point server.

2. Configure the **Open Gate** button. See the [Open Gate](#) section below for more information.

## Customer search

You can manually search for customers who forgotten their passes using their pass or alternate key numbers, names, emails, phone numbers, or customer IDs.

To manually search for a customer:



1. Click **Customer Search** at the top right of the **Pass Validation** page.


**Customer Search**

Name | margaret leigh

CUSTOMER NAME	ID	PHONE	DATE OF BIRTH	EMAIL	ACTION
Margeret Leigh	163232	(333) 333-3333	Jul 24, 1955	test@test.com	<input type="button" value="Select"/>

2. On the **Customer Search** page:
  - a. Select to search for the customer by their **Alternate key ID, Customer ID, Email, Name, Pass Number, Scan Card** (pass card number), or **Telephone** number.
  - b. Enter the number or text that you want to search for.
  - c. Press Enter or click **Search**.
  - d. Click **Select** to validate the customer.

## Margaret Leigh



**Name** [Margaret Leigh](#)

**Type**

**ID** 163232

**Identifier ID**

**Gender** Female

**Age** 59

**Birth Date** Jul 24, 1955

**Home Tel** (333) 333-3333

**Work Tel** --

**Cell Tel** --

**Address** 123 Main St  
Springfield, CA 12345

**Customer Since** Nov 8, 2003

**Member Since** Feb 18, 2015

**Last Scan** Feb 24, 2015

[Customer Alerts](#)

[Notes/Alerts](#) --

SELECT	PACKAGE	STATUS	EFFECTIVE	EXPIRATION	USES	LAST RENEWED	LAST CHECK IN	LAST CHECK OUT
<input type="radio"/>	<a href="#">Standard Adult</a>	Active	Feb 18, 2015	Feb 25, 2015	No limit	--	Feb 24, 2015 12:02 PM	--

Pass is not valid at this entry point at this time

[Back](#)
[Check In](#)

3. On the **Customer Validation** page, the customer's information appears, along with any alerts, passes or alternate keys that are linked to their account:
  - If the customer has no valid memberships or alternate keys, click **Back** to return to the **Customer Search** page.
  - Select a membership package to validate, if applicable.
4. Click **Check in** to validate the customer and return to the main **Pass Validation** page.

## Open gate button

If you use a gatekicker and want to use the new **Pass Validation** page, then you can now manually open your gate or turnstile to allow entry for someone without valid membership credentials at your entry point.

To enable the **Open Gate** button on the new **Pass Validation** page, enable one of the following options:

- The "**Gated entry point?**" option at **Administration > Membership Settings > Entry Points > Scan/Gate Fields** section for this entry point.
- The **Use Local Serial Port for Gate-Kicker** option at **Administration > System Settings > Workstations > Membership** section for this workstation.

To manually open the gate for your entry point, once you have enabled this button:



Open Gate

- At the top right of the **Pass Validation** page, Click the **Open Gate** button.

Note:

For Team Axxess devices, the current ACTIVE Net version only includes open gate functionality due to device API limitations for the following scenario:

The quick family membership check-in/out function is disabled and there is only one valid membership package on the pass card.

## Membership validation sound events

### Configure membership validation sound events

Sound events that play in specific situations on the **Pass Validation** page work as before. To configure system-wide sound events:

- Go to **Administration > Membership Settings > Configuration > Scanning Sounds** section.

To override system-wide sound events for a specific workstation:

- Go to **Administration > System Settings > Workstations > select a workstation > Membership** section > **Enable Membership Scanning Sounds?**

To add a sound for a specific event, execute the following steps:

1. At the system-wide level or a specific workstation level, in the **“Enable Membership Scanning Sounds?”** dropdown list, select **Yes**.

Enable Membership Scanning Sounds? **Yes** (overrides membership configuration setting)

Note: Only .wav format audio files can be used for Membership Scanning Sounds

Birthday Alert

Staff or Customer Notes Alert

Pass at Last Use

Pass Debit Balance Greater Than

Pass Expiry within  Days

Pass Invalid

Pass Multiple Select

Pass Scanned Same Day

Pass Valid

Upload New Audio File

- For example, to set a sound to the **Pass Valid** event, click the dropdown list next to **Pass Valid**.

The screenshot shows a configuration window for 'Enable Membership Scanning Sounds?'. At the top, it is set to 'Yes' with a note '(overrides membership configuration setting)'. Below this is a green note: 'Note: Only .wav format audio files can be used for Membership Scanning Sounds'. The interface lists several events with associated dropdown menus for selecting sounds:

- Staff or Customer Notes Alert
- Pass at Last Use
- Pass Debit Balance Greater Than 0
- Pass Expiry within 7 Days
- Pass Invalid
- Pass Multiple Select
- Pass Scanned Same Day
- Pass Valid (highlighted)

The dropdown menu for 'Pass Valid' is open, showing a list of sound options: balance, birth alert, birthday, debit, expire, expiry, invalid, invalid scan, last, multiple, multiple pass, notes, pass last use, pss valid, same, scan same day, staff customer notes, and valid. The 'valid' option is selected and highlighted in blue. Below the dropdown is a link that says 'Upload New Audio File' with a green play button icon. At the bottom, there is a dropdown for 'Multi Valid Packages Scan Options' with a note '(overrides entry point configuration setting)'.

- You can select a default sound from the dropdown list or click **Upload New Audio File** to upload a local audio file to ACTIVE Net.

A new Pass Multiple select sound has been added

To play a sound when a staff user is required to select a valid membership package for the customer, select a sound for this option.

## Configuration changes

Since the new pass validation page incorporates the old staff site pass validation page and the Entry Point application into a single interface, some configuration options are no longer necessary.

The following configuration options have been removed:

- **Show Custom Questions and Answers during Pass Validation**  
– Membership package custom questions and answers are no longer displayed on the **Pass Validation** page.
- **Confirm Valid Passes** – When a customer scans a valid pass, they display in the **Valid Members** area, and their valid memberships will always display, along with their balance and a warning if the pass is about to expire.
- **Popup Confirmation Timeout** – The new **Pass Validation** page no longer requires a countdown timer.
- **Manned/Unmanned Entry Point** – This distinction is no longer needed because the **Pass Validation** page can now be used for both manned and unmanned entry points.

The following configuration options have been added:

- **Administration > Membership Settings > Entry Points > select an entry point > Scan/Gate Fields section > Gated entry point?** – Use this option to specify if this entry point uses a network gatekicker. If so, then enter the IP address and port of your Entry Point server so that ACTIVE Net can signal it to open the gate.
- **Administration Home > Membership Settings > Entry Points > Change Entry Point Detail > General section > Multi Valid Packages Scan Options** – Use this option to enable/disable multi valid packages scan function at the entry point level.
- **Administration Home > System Settings > Workstations > Change Workstation Detail > Membership section > Multi Valid Packages Scan Options** – Use this option to enable/disable multi valid packages scan function at the workstation level.
- **Administration Home > Membership Settings > Entry Points > Change Entry Point Detail > General section > Allow Quick Family Membership Check-in/out?** – Use this option to enable/disable Quick Family Membership Check-in/out function at the entry point level.