How to Bulk Change Member Records 1

How to Bulk change member records September 2024

Introduction
Allows you to change member records in bulk when the change is the same change to all member records selected.

Before you begin create a backup file, refer to article **How to Manually Create a Backup in Gym Assistant** for instructions.

- Begin by pulling the report including the members being changed into an excel spreadsheet: type ***export members to excel*** into the enter member # or name field on Gym Assistant member record and click enter on your keyboard.

- Select the appropriate filters to determine the members that this change will be made for > click **Generate Report**.

- Click **Export.**

```
Membership List    [Suzette's Gym 10/02/2024]

Member  Member                 Membership             Billing    Billing       Billing     Due
Number  Name                   Type                   Status     Option        Amount      Date
--------------------------------------------------------------------------------------------------
     1  Test, Missing Signups  Monthly                ACTIVE     Credit Card     10.00     11/01/2024
     2  Test, Test             Monthly                ACTIVE     Credit Card     10.00     11/01/2024
     3  Test 2, Test           Monthly                ACTIVE     Credit Card     10.00     11/01/2024
     4  Test, Primary XXX      Primary                ACTIVE     Credit Card     30.00     12/01/2024
     5  Test, Dependant XXX    Monthly                ACTIVE     Monthly         10.00  d  12/01/2024
     9  Test, Void             Monthly                ACTIVE     Credit Card     10.00  * 10/02/2024
    10  Test, Contract         Primary                ACTIVE     Credit Card     30.00     11/01/2024
    11  Endofmonth, Test       Monthly                ACTIVE     Credit Card     10.00     11/01/2024
    12  Test, Measurement      Primary                ACTIVE     Credit Card     30.00     11/01/2024
    14  Test, Active And Fit   Monthly                ACTIVE     Monthly         10.00     11/01/2024
    15  TEST, ACH              Primary                ACTIVE     ACH             30.00     11/01/2024
    20  Test, Portal           2 Contract test        ACTIVE     Credit Card     10.00     11/01/2024
    21  Test 1, Portal         Primary                ACTIVE     Credit Card     30.00     11/01/2024
    22  Test 2, Portal         2 Contract test        ACTIVE     Credit Card     10.00     11/01/2024
    23  Test, Punch Card       Test Punch Card        ACTIVE     20 Visits      100.00     10 passes
    24  Test, Credit           Monthly                ACTIVE     Monthly         10.00     11/01/2024
    26  Annual Test, Semi      Semi annual            ACTIVE     Semi-Annual     99.00  v  11/01/2024
    27  Test, Semi Annual/12 Mo Semi Annual/12 mo te  ACTIVE     Semi-Annual    100.00     11/01/2024
    28  Test, Minimum          Primary                ACTIVE     Credit Card     30.00     11/01/2024
    29  Tracking Test, Punchcard Test Punch Card      ACTIVE     20 Visits      100.00     16 passes
    30  Test, Correct Depentant Primary               ACTIVE     ACH             30.00     11/01/2024
    31  Test, Correct Dependant Dependant             ACTIVE     Monthly         10.00  d  11/01/2024
    32  Test, Incorrect Dependan Primary              ACTIVE     Monthly         30.00     11/01/2024
    33  Test, Incorrect Dependan Dependant            ACTIVE     Monthly         10.00  d  11/01/2024
    34  Cerko, Test Primary    Monthly                ACTIVE     Credit Card     10.00     11/01/2024
    35  Cerko, Test Dependant  Monthly                ACTIVE     Monthly         10.00  d  11/01/2024
    36  Test, Portal           Monthly                ACTIVE     Credit Card     10.00     11/01/2024
    38  Test , Portal          Monthly                ACTIVE     Credit Card     10.00     11/01/2024
    39  Billing Test, Suzette  3 Billing plan test    ACTIVE     Credit Card     10.00     11/01/2024
    40  Billing test 2, Suzette 3 Billing plan test   ACTIVE     Credit Card     10.00     11/01/2024
    42  Test, Freeze           Monthly                ACTIVE     Monthly         10.00     11/01/2024
    43  Harlan, Jon            4 Annual Membership     ACTIVE     Annual        120.00     11/01/2024
    44  Test, Renew Active     Renew active           ACTIVE     Monthly          0.00     11/01/2024
    45  Cerko, Dependant       Dependant              ACTIVE     Monthly         10.00  d  11/01/2024
    46  Test, Log              4 Annual Membership     ACTIVE     Credit Card    120.00     11/01/2024
    47  Fritz, Rich            4 Annual Membership     ACTIVE     Annual        120.00     11/01/2024
    48  Test 1, Corp           Corp members           ACTIVE     ACH              0.00     11/01/2024
    49  Member 2, Corp         Corp members           ACTIVE     ACH              0.00     11/01/2024
    50  Business, Corp         Corp test account      ACTIVE     ACH           2233.69     11/01/2024
    51  Welcome letter test, Suz 4 Annual Membership  ACTIVE     Credit Card    120.00     11/01/2024
    52  Welcome Test 1, Suzette Monthly               ACTIVE     Credit Card     10.00     11/01/2024
    53  Test, Tablet           4 Annual Membership     ACTIVE     Credit Card    120.00     11/01/2024
    54  Test, Cash             Monthly                ACTIVE     Monthly         10.00     11/01/2024
    55  Test, 1 Day To Pay     Monthly                ACTIVE     Monthly         20.00  a  11/01/2024
    56  Test, 3 Days To Pay    Monthly                ACTIVE     Monthly         10.00     11/01/2024
    57  Test, Nancy            Monthly                ACTIVE     Monthly         10.00     11/01/2024
    58  Test, Silver Sneakers  Silver Sneakers        ACTIVE     Credit Card      0.00     11/01/2024
    59  Test, Free             Free                   ACTIVE     ACH              0.00     11/01/2024
    60  Test, App              Monthly                ACTIVE     Credit Card     10.00     11/01/2024
    61  Gym, Jason's           Monthly                ACTIVE     Monthly         10.00     11/01/2024
    62  Test, Current Balance  Dependant              ACTIVE     Monthly         10.00  d  11/01/2024

Search Criteria:

  Membership Types:  All
    Billing Status:  Active
        Home Club:   ALL
```
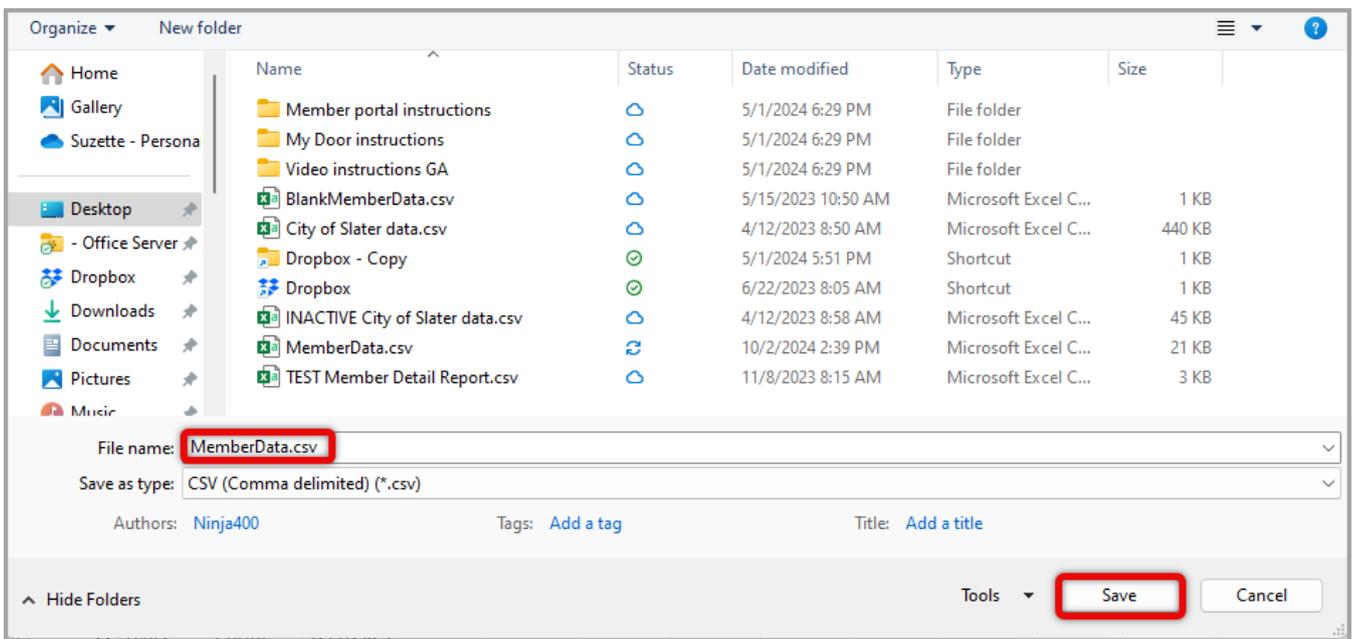
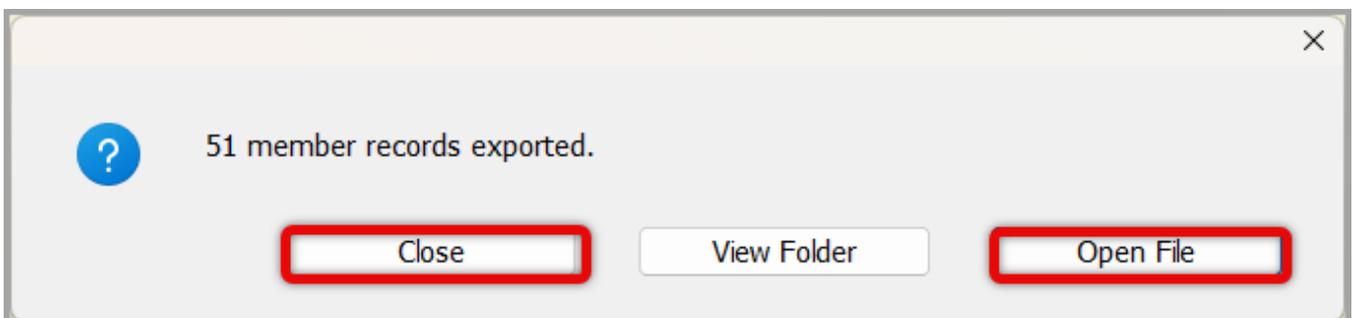Print   Save   Copy   View in Browser   View   Cancel   Export

- Select **CSV** as the format.
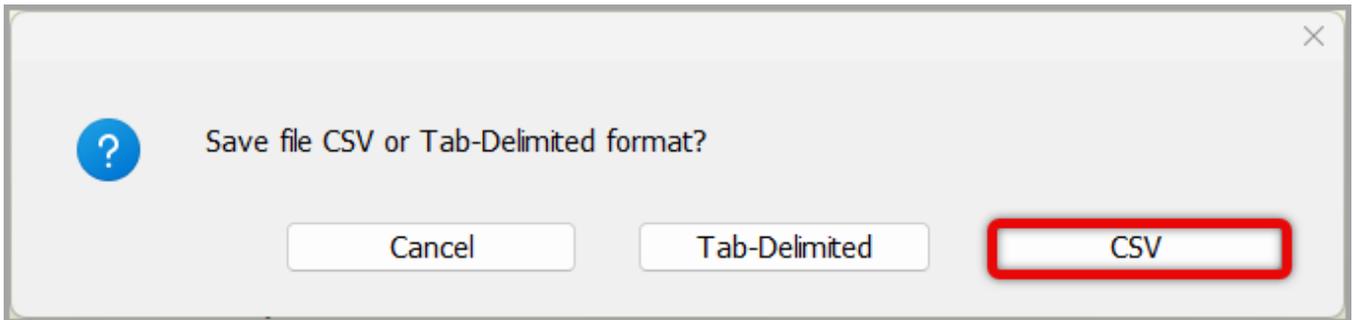
- Select where on the computer this report will be saved as **MemberData.csv** and click **Save**.
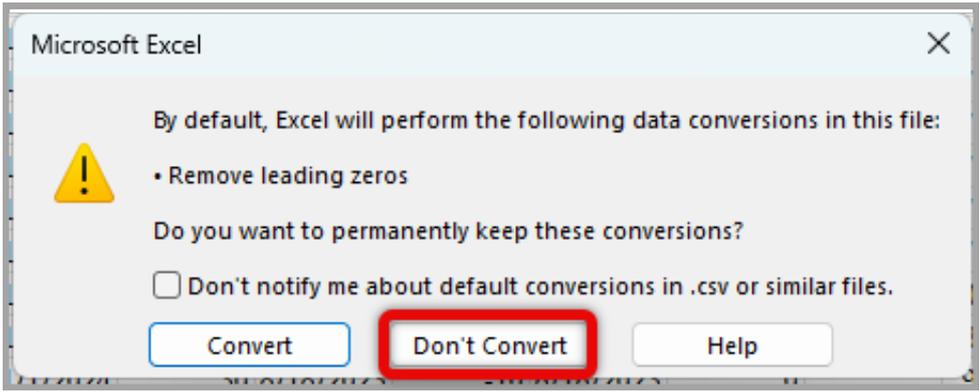

- Select **Open File** if you are making the changes to the data now or **Close** if you will open the file at a later time to make the changes.
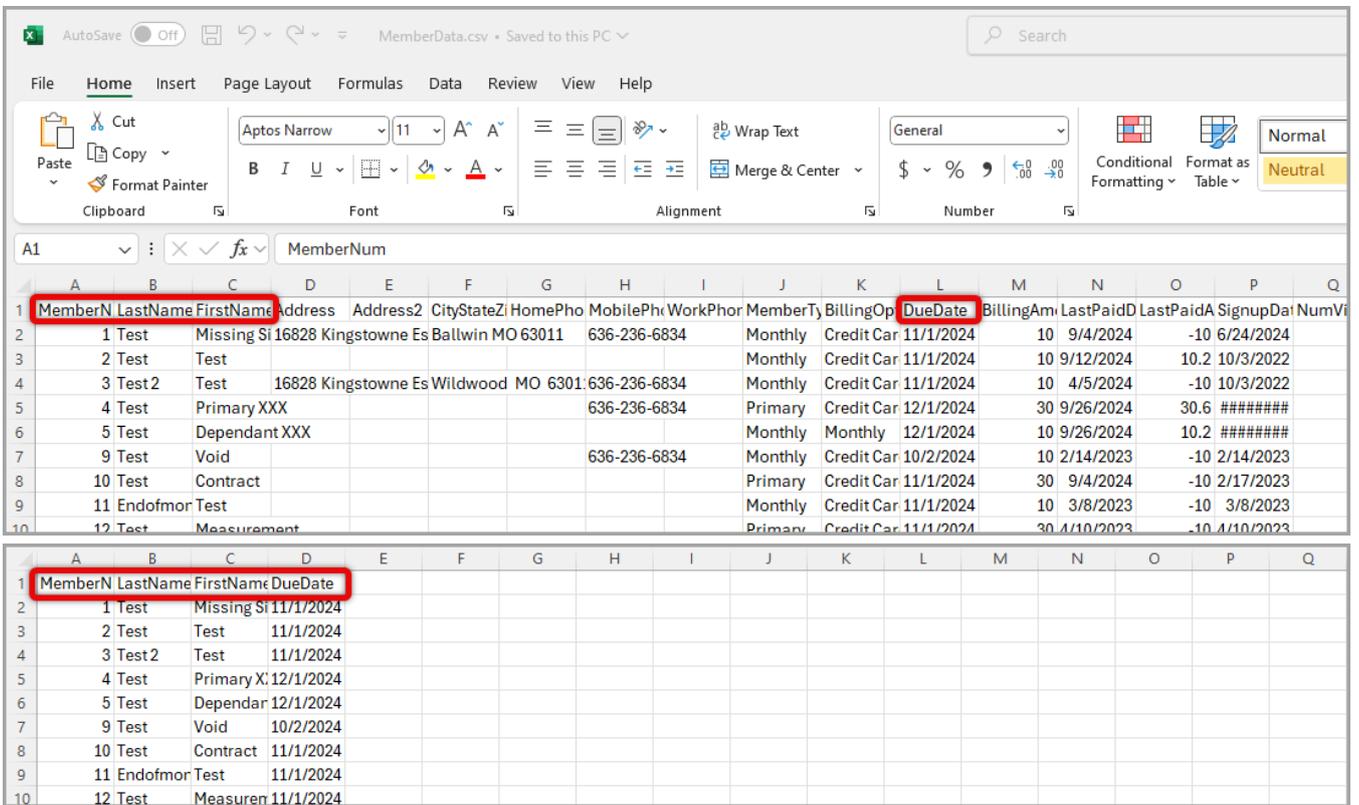

Making changes to the report to update data:

- Open the excel spreadsheet where it has been saved, select **Don't Convert**.

- Delete all columns except for **MemberNum**, **LastName**, **FirstName** and the column that includes the data you will be making the bulk change to (in this example I will be changing **DueDate**).

- Make the change to the column to reflect the bulk change you want made to the data in that column (in this example I have moved all due dates to 12/1/2024).
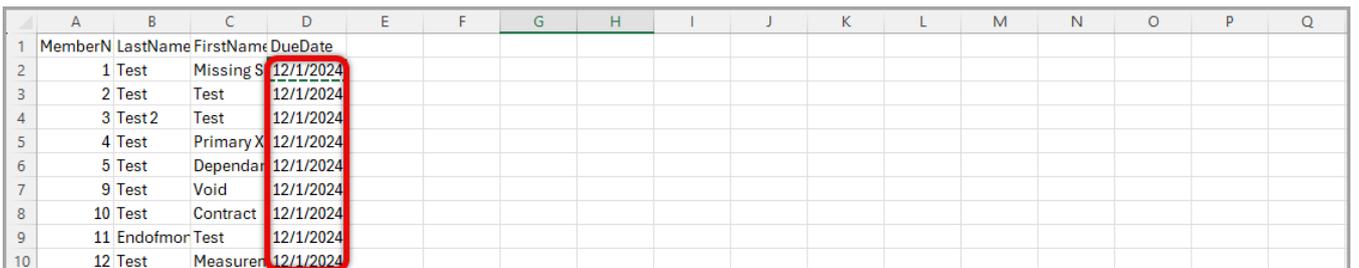
- Click the X at the top right of the excel spreadsheet > click **Save** making sure the format

has remained the same.
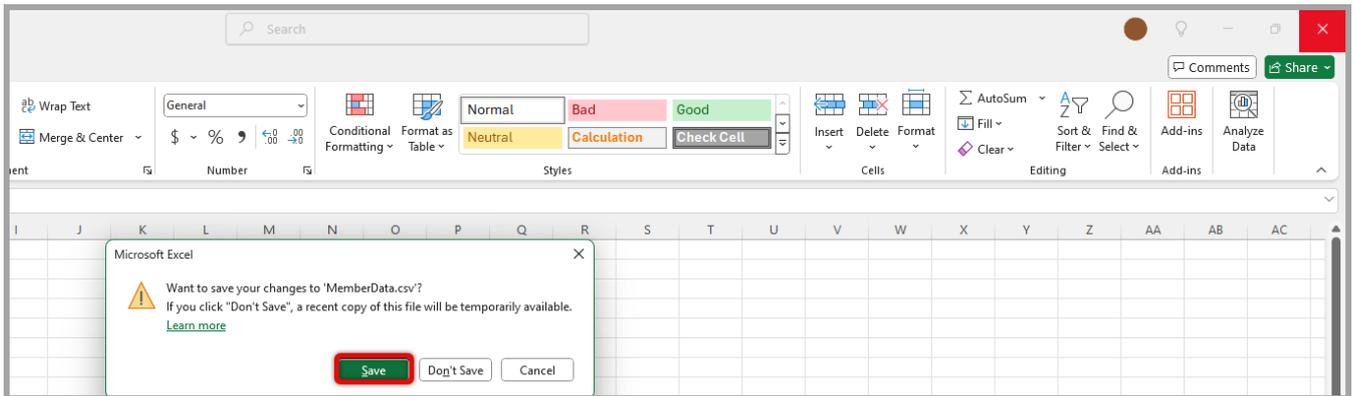
- Click **Save** next making sure to save it to someplace on the computer where it will be easily located.
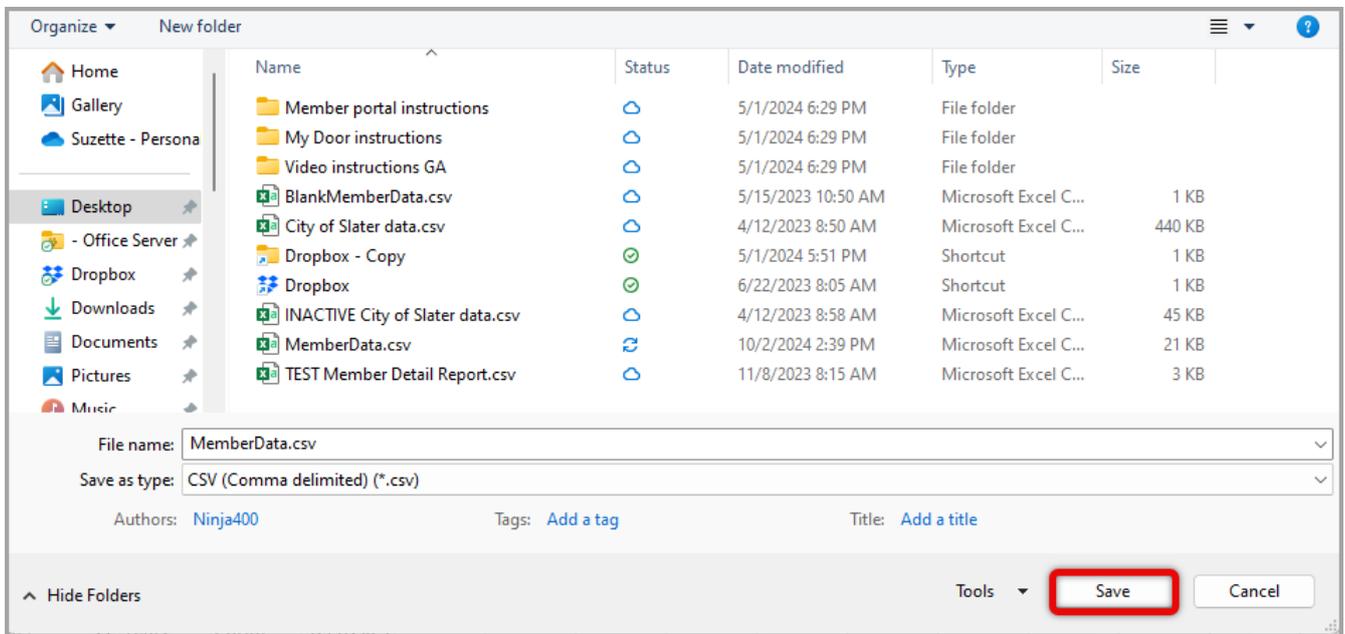
Merging the data into Gym Assistant

- Open Gym Assistant: type ***merge members*** into the enter member # or name field on Gym Assistant member record and click enter on your keyboard.

- Select data format **CSV or Tab-Delimited,**

- Locate the file with the corrected data on the computer > click **OK** in the box indicating the changes to the data being made.
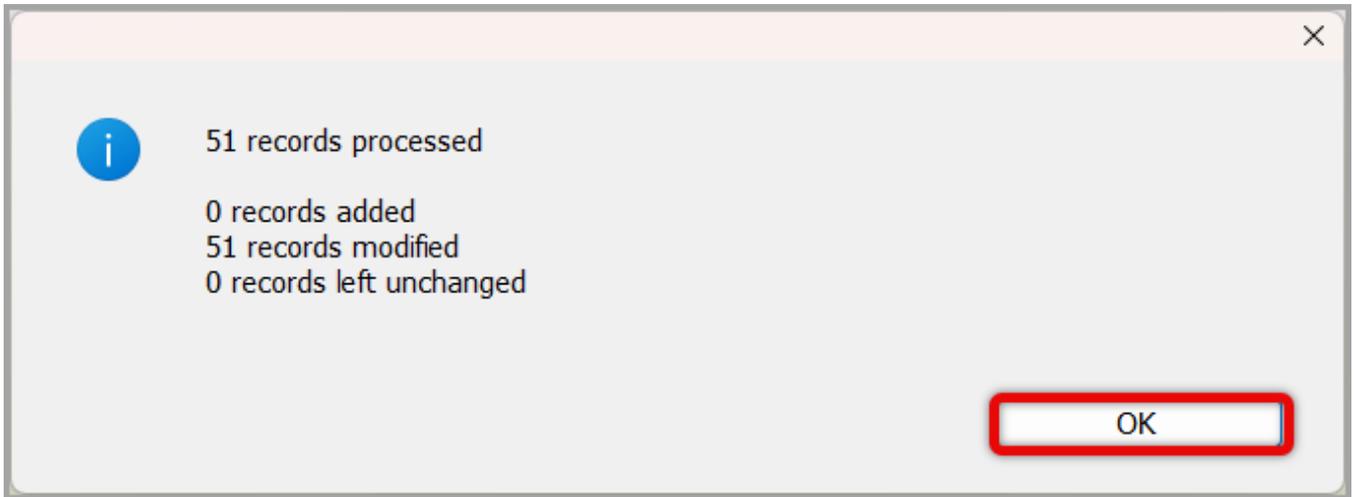
The change is made immediately and can be verified by selecting a member profile that the change has affected.

Online URL: https://gymassistant.phpkb.cloud/article/how-to-bulk-change-member-records-1.html