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.

File Edit Member Reports Billing Documents Por d			
	#2		
	- TT 4	2 Test Tes ⁻	-
			L
		Membership Up-to-Date!	
	17 visit	ts this month, 0 last month, 19 tota	al
Personal Contract Billing Oth	er 🗙 Waivers	S	
Billing Plan: Mo	onthly	Due Date:	11/01
Billing Option: Cre	edit Card	Last Paid Date:	09/12
Billing Amount: 10	.00	Last Paid Amount:	10.20
Billing Status: AC	TIVE	Current Balance:	0.00
Terminate Billing: Ne	ver	Last Check-In:	09/18/2024
Membership Add-Ons:	- none -		
Linked Memberships:	1 Depende	ents: Current Balance Test (#62)	
Enter Membe	er # or Name	• • *export members to excel*	View

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

Export Member Data			X
Select Filters for Members	s List: Memorized Reports:	~	
Plan Types:	All Plans		
Billing Status:	Active ~		
Billing Options:	· All ~		
Due Date:	: All v		
Contract Begin:	· All ~		
Contract End:	All v		
Signup Date:	: All ~		
Visits Recorded:	All v		
Search Fields:	none v		
Member Flags:	- none - V		
Sort By:	Membership Number ~		
1			
	Clear Filters <u>C</u> ancel <u>G</u> enerate Report		?

• Click Export.

Member Number	Member Name	Membership Type	Billing Status	Billing Option	Billing Amount	Due 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 Credit Card	30.00	11/01/2024
11 12	Endofmonth, Test Test, Measurement	Monthly Primary	ACTIVE	Credit Card	10.00	11/01/2024 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 27	Annual Test, Semi Test, Semi Annual/12 Mo	Semi annual Semi Annual/12 mo te	ACTIVE	Semi-Annual Semi-Annual	99.00 V 100.00	11/01/2024
27	Test, Minimum	Primary	ACTIVE	Credit Card	30.00	11/01/2024 11/01/2024
29	Tracking Test, Punchcard	-	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		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 ACTIVE	Monthly Credit Card	10.00 d	11/01/2024
36	Test, Portal Test , Portal	Monthly Monthly	ACTIVE	Credit Card Credit Card	10.00	11/01/2024 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 48	Fritz, Rich Test 1, Corp	4 Annual Membership Corp members	ACTIVE ACTIVE	Annual ACH	120.00	11/01/2024 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 Test, 3 Days To Pay	Monthly	ACTIVE	Monthly	20.00 a	11/01/2024
56 57	Test, Nancy	Monthly Monthly	ACTIVE	Monthly Monthly	10.00	11/01/2024 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
Members	iteria: hip Types: All ng Status: Active Home Club: ALL					
						_

• Select **CSV** as the format.

			×
?	Save file CSV or Tab-Delimited	format?	
	Cancel	Tab-Delimited	CSV

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

A Home	Name	Status	Date modified	Туре	Size	
🔁 Gallery	Member portal instructions	0	5/1/2024 6:29 PM	File folder		
lange Suzette - Persona	My Door instructions	0	5/1/2024 6:29 PM	File folder		
	Video instructions GA	0	5/1/2024 6:29 PM	File folder		
🛄 Desktop 🔹 🖈	🔊 BlankMemberData.csv	0	5/15/2023 10:50 AM	Microsoft Excel C	1 KB	
- Office Server *	🖬 City of Slater data.csv	0	4/12/2023 8:50 AM	Microsoft Excel C	440 KB	
	🗾 Dropbox - Copy	Ø	5/1/2024 5:51 PM	Shortcut	1 KB	
🐉 Dropbox 🔹 🖈	彦 Dropbox	\odot	6/22/2023 8:05 AM	Shortcut	1 KB	
🚽 Downloads 🛛 🖈	INACTIVE City of Slater data.csv	0	4/12/2023 8:58 AM	Microsoft Excel C	45 KB	
📑 Documents 🛛 🖈	🔹 MemberData.csv	C	10/2/2024 2:39 PM	Microsoft Excel C	21 KB	
🔀 Pictures 🛛 🖈	🔹 TEST Member Detail Report.csv	0	11/8/2023 8:15 AM	Microsoft Excel C	3 KB	
🗛 Music 🛛 🔺						
File name: Mem	berData.csv					
Save as type: CSV (Comma delimited) (*.csv)					
Authors: Ninja	a400 Tags: Ac	dd a tag	Title: A	dd a title		
Hide Folders				Tools 👻 🌅	Save Ca	ancel

• 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.

			×
?	51 member records exported.		
	Close	View Folder	Open File

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**).

x	AutoSav	e Off	89~	· (²	Membe	rData.csv • \$	Saved to thi	s PC ∨				(,∕⊂ Sea	rch			
File	Hon	ne Inser	t Page L	ayout F	ormulas	Data Rev	view Vie	w Help									
Pas		Cut Copy ~		os Narrow		~ A^ A~		≡ ≫.				General			nditional I		Normal
Pas Y	Se 🗳 I	Format Pain	ter							/lerge & Cer		\$ ~ %		→0 Forr		Table ¥	Neutral
	Clipb	oard	۲ <u>م</u>		Font	5		A	lignment		L2	Num	ber	L2			
A1			$\sqrt{f_x} \sim$	Member	Num												
	А	в	С	D	E	F	G	U			V	L	М	N	0	F) (
Mo												p DueDate					
						Ballwin M						ar 11/1/2024		0 9/4/20		-10 6/24/	
3			Test	10020 111	531011110 23	Dutterini	5 00011	000 200 0	004			ar 11/1/2024		0 9/12/20		0.2 10/3/	
	-			16828 Kin	estowne Es	Wildwood	MO 6301	636-236-6	834			ar 11/1/2024		0 4/5/20		-10 10/3/	
5		Test	Primary X		D			636-236-6				ar 12/1/2024		0 9/26/20		0.6 ####	
5	5	Test	Dependar							Monthly	Monthly	12/1/2024	1	0 9/26/20	24 1	0.2 ####	####
7	9	Test	Void					636-236-6	834	Monthly	Credit Ca	ar 10/2/2024	1	0 2/14/20	23	-10 2/14/	2023
3	10	Test	Contract							Primary	Credit Ca	ar 11/1/2024	4 3	0 9/4/20	24	-10 2/17/	2023
9	11	Endofmor	Test							Monthly	Credit Ca	ar 11/1/2024	1	0 3/8/20	23	-10 3/8/	2023
0	12	Tost	Measuren	nent						Primany	Credit C	ar 11/1/2024	9	0 4/10/20	23	10 4/10/	2023
	А	В	С	D	E	F	G	Н	1	J	К	L	М	N	0	Р	Q
1 Me	emberN	LastName	FirstName	DueDate													
2	1	Test	Missing Si	11/1/2024													
3	2	Test	Test	11/1/2024													
4	3	Test 2	Test	11/1/2024													
5	4	Test	Primary X	12/1/2024													
6	5	Test	Dependar	12/1/2024													
7	9	Test	Void	10/2/2024													
8	10	Test	Contract	11/1/2024													
9	11	Endofmor		11/1/2024													
0	12	Test	Measurem	11/1/2024													

• 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).

	А	В	С	D	E	F	G	н	I.	J	K	L	М	N	0	Р	Q
1	MemberN	LastName	FirstName	DueDate													
2	1	Test	Missing S	12/1/2024													
3	2	Test	Test	12/1/2024													
4	3	Test 2	Test	12/1/2024													
5	4	Test	Primary X	12/1/2024													
6	5	Test	Dependar	12/1/2024													
7	9	Test	Void	12/1/2024													
8	10	Test	Contract	12/1/2024													
9	11	Endofmor	Test	12/1/2024													
10	12	Test	Measuren	12/1/2024													

• Click the X at the top right of the excel spreadsheet > click **Save** making sure the format

has remained the same.

		🔎 Search									(o ×
												Co	mments	🖻 Share ·
ab Wrap Text	nter ~	General ✓ \$ ✓ % 9 50 30	Conditional Format a Formatting v Table v		Bad Calculation	Good Check Cel	~ ~ ~		Delete Format	∑ AutoSum ↓ Fill ~ ♦ Clear ~	× ZV Sort & Find Filter × Select		Analyze Data	
ent	L7	Number F	ū.	2	ityles				Cells		Editing	Add-ins		~
J	к	L M	N O	P Q		S T	U	V	W	ХҮ	Z	AA	AB	AC
	Microso	ft Excel Want to save your changes If you click "Don't Save", a r Learn more	recent copy of this file will	be temporarily avail										

• Click **Save** next making sure to save it to someplace on the computer where it will be easily located.

A Home	Name	Status	Date modified	Туре	Size	
🔁 Gallery	📒 Member portal instructions	0	5/1/2024 6:29 PM	File folder		
lange Suzette - Persona	📒 My Door instructions	0	5/1/2024 6:29 PM	File folder		
	📒 Video instructions GA	0	5/1/2024 6:29 PM	File folder		
🛄 Desktop 🔹 🖈	🔊 BlankMemberData.csv	0	5/15/2023 10:50 AM	Microsoft Excel C	1 KB	
•	🔊 City of Slater data.csv	0	4/12/2023 8:50 AM	Microsoft Excel C	440 KB	
🏂 - Office Server 🖈	声 Dropbox - Copy	\odot	5/1/2024 5:51 PM	Shortcut	1 KB	
🐉 Dropbox 🛛 🖈	🗦 Dropbox	\odot	6/22/2023 8:05 AM	Shortcut	1 KB	
🛓 Downloads 🛛 🖈	INACTIVE City of Slater data.csv	0	4/12/2023 8:58 AM	Microsoft Excel C	45 KB	
📑 Documents 🛛 🖈	🔊 MemberData.csv	C	10/2/2024 2:39 PM	Microsoft Excel C	21 KB	
🔀 Pictures 🛛 🖈	😰 TEST Member Detail Report.csv	0	11/8/2023 8:15 AM	Microsoft Excel C	3 KB	
🗛 Music 🛛 🔺						
File name: Men	nberData.csv					
Save as type: CSV	(Comma delimited) (*.csv)					
Authors: Ninj	ia400 Tags: Ado	d a tag	Title: A	dd a title		
Hide Folders				Tools 👻 🌅	Save Can	a a l

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.

🛃 Gym Assistant - Mini 250 'ORVILLE' (#4) on 'OF	VILLE' Path=C:\Gym	Assistant 2.6\Data		
File Edit Member Reports Billing Documer	ts Portal Settings	Utilities Help		
	1	47 T	est Tes	t
	7			•
		Members	hip Up-to-Date!	
			, 17 last month, 19 tot	al
Personal Contract Billing	Other × W	/aivers		
Billing Plan:	Monthly		Due Date:	11/0
Billing Option:	Credit Car	d	Last Paid Date:	09/1
Billing Amount:	10.00		Last Paid Amount:	10.2
Billing Status:	ACTIVE		Current Balance:	0.00
Terminate Billing:	Never		Last Check-In:	09/18/2024
Membership Add-Ons:	- nor	1e -		
Linked Memberships:	1 De	pendents: Curre	nt Balance Test (#62)	
Enter Me	ember # or	Name: 🕨 🔭	rge members*	View
		Basic Display	Display GateKeeper	
				0 of 200 me

				×
?	Select (data format:		
	(<u>C</u> ancel	<u>B</u> TX	CSV or <u>T</u> ab-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: <u>https://gymassistant.phpkb.cloud/article/how-to-bulk-change-member-</u> records-1.html