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.**

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

Member   Member                  Membership            Billing    Billing       Billing     Due
Number   Name                    Type                  Status     Option        Amount      Date
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     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
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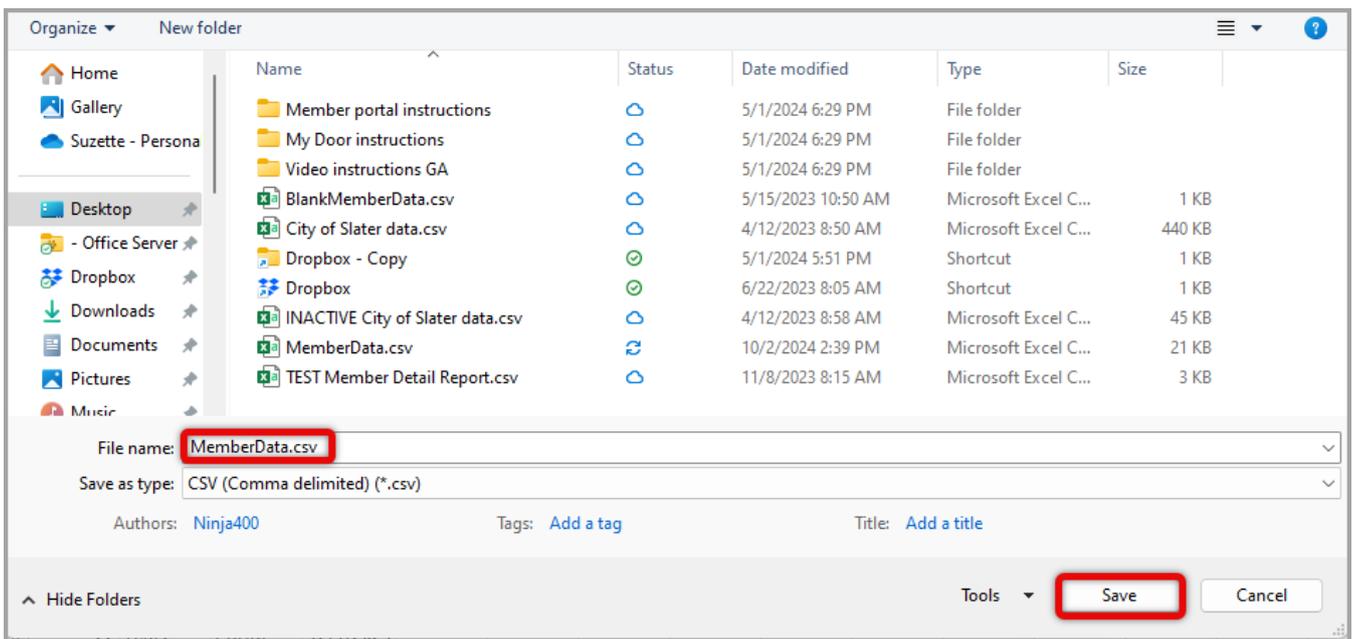
Print   Save   Copy   View in Browser   View   Cancel   Export
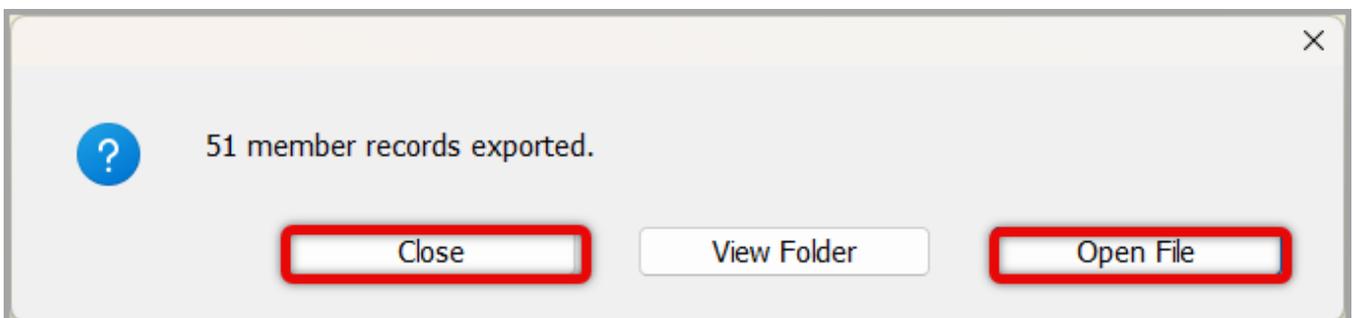
• Select **CSV** as the format.
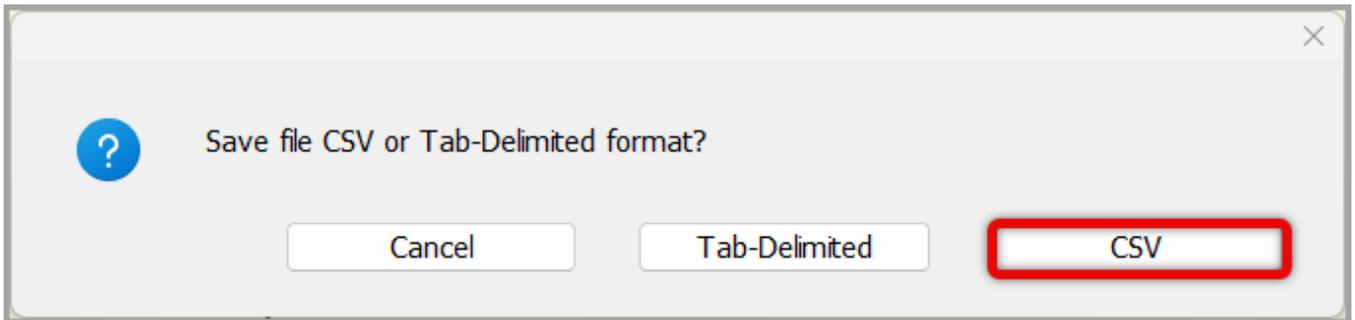
- Select where on the computer this report will be saved as **MemberData.csv** and click **Save**.
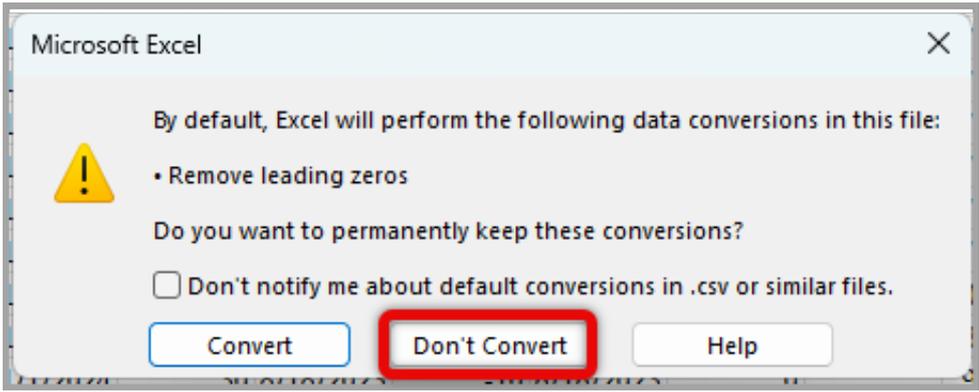

- Select **Open File** if you are making the changes to the data now or **Close** if you will open the file at a later time to make the changes.
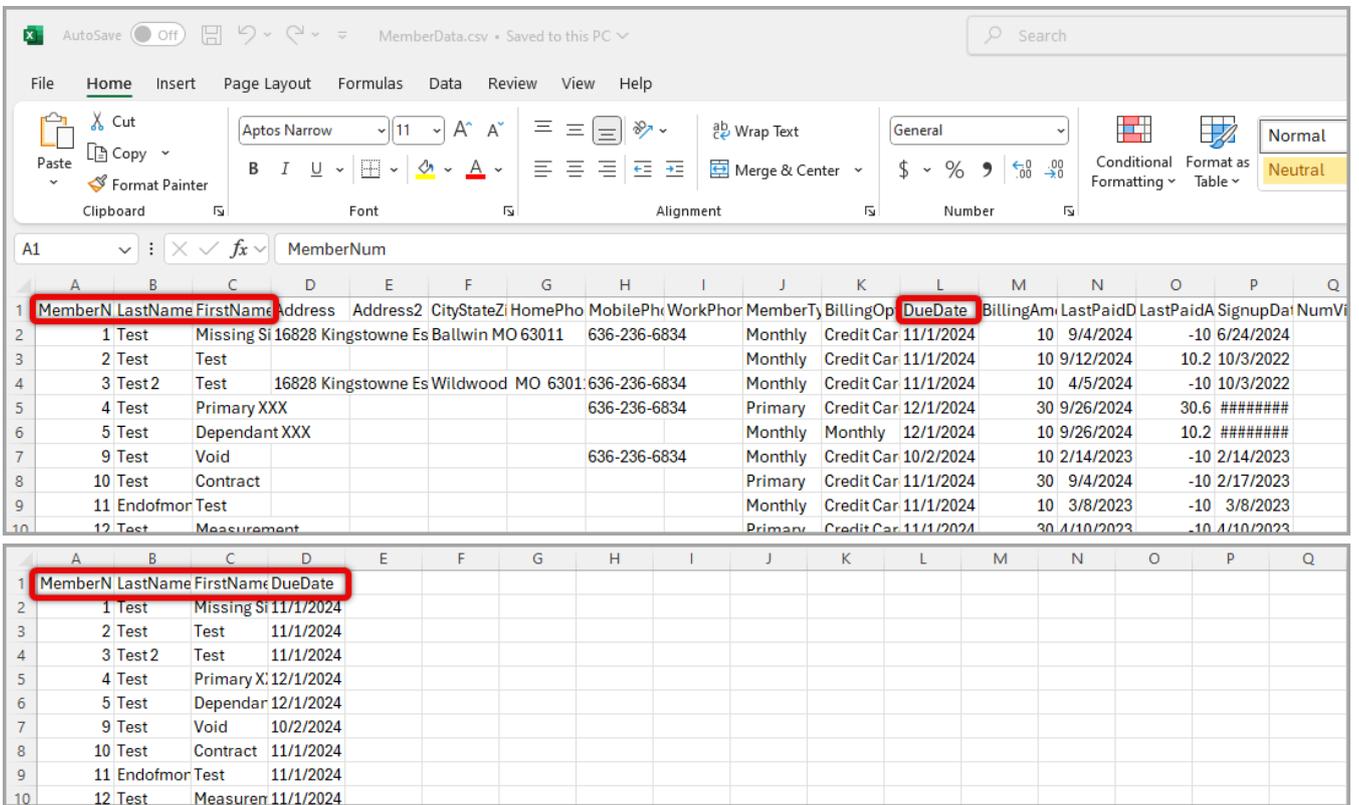

Making changes to the report to update data:

- 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).
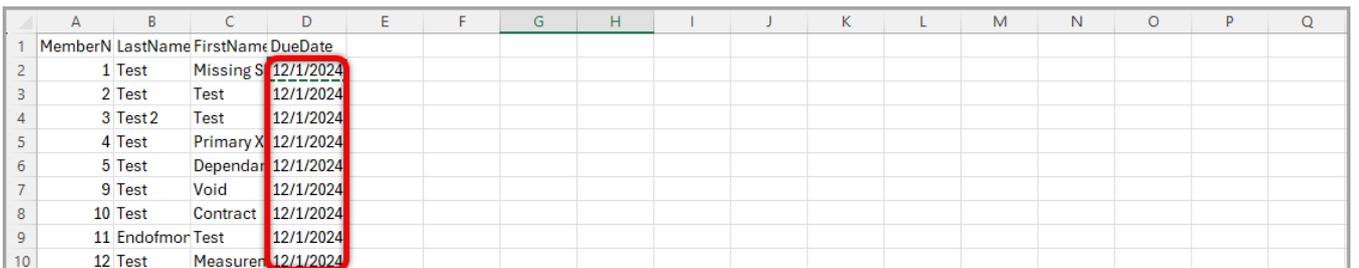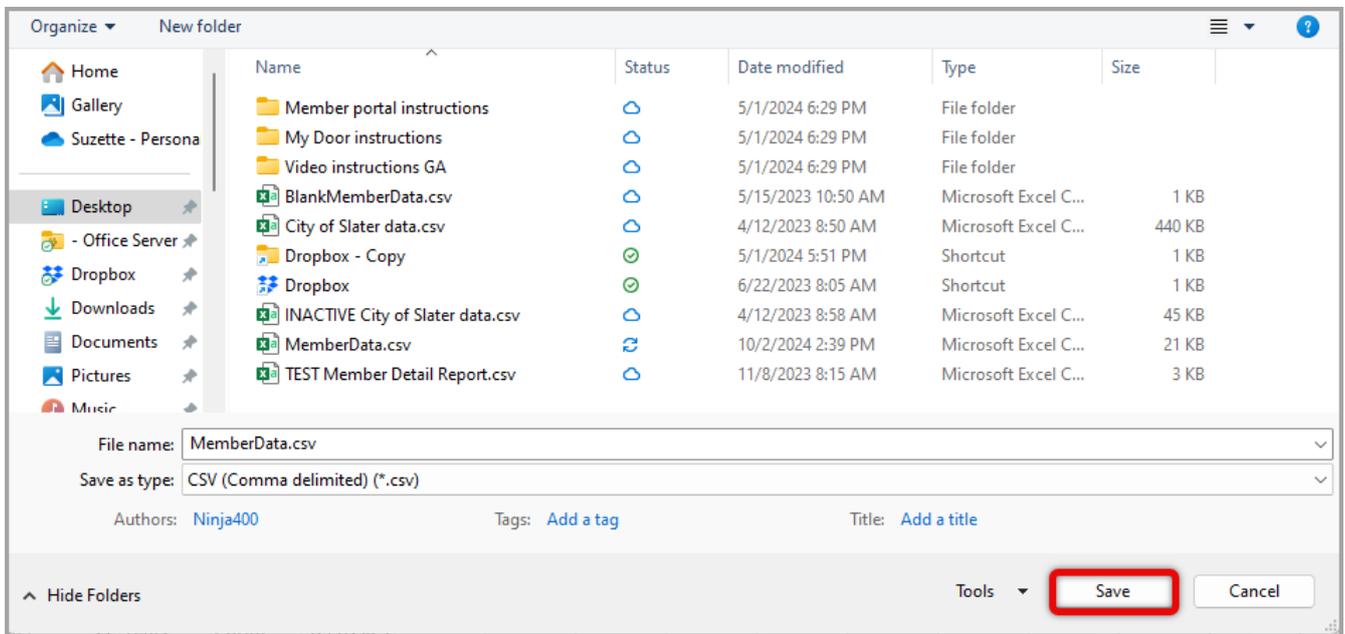

- Click the X at the top right of the excel spreadsheet > click **Save** making sure the format

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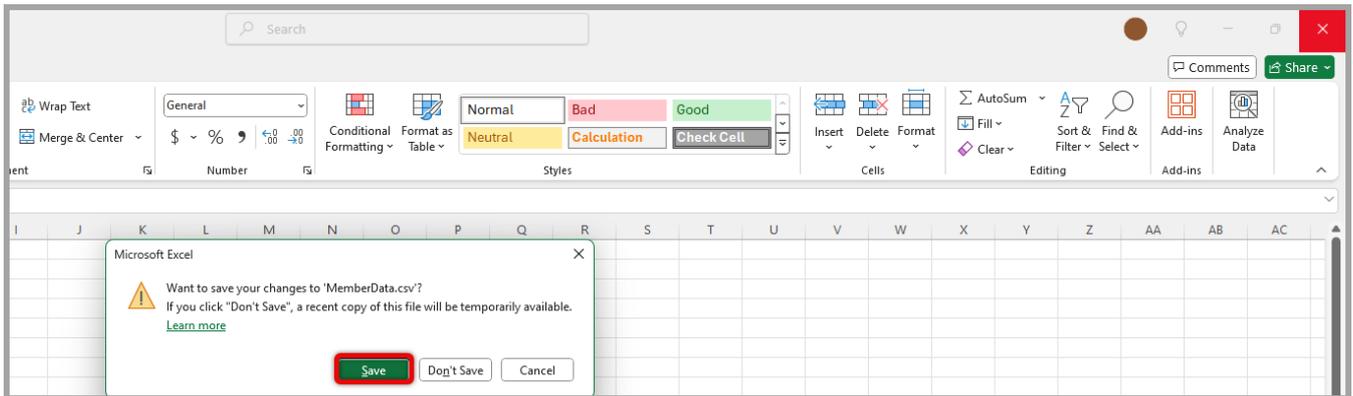
- Click **Save** next making sure to save it to someplace on the computer where it will be easily located.

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.