

# 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.

Gym Assistant - Mini 250 | "ORVILLE" (#4) on "ORVILLE" | Path=C:\Gym Assistant 2.6\Data

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# #2 Test Test

**Membership Up-to-Date!**

17 visits this month, 0 last month, 19 total

Personal	Contract	Billing	Other	✖ Waivers
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Billing Plan:	Monthly	Due Date:	11/01
Billing Option:	Credit Card	Last Paid Date:	09/12
Billing Amount:	10.00	Last Paid Amount:	10.20
Billing Status:	ACTIVE	Current Balance:	0.00
Terminate Billing:	Never	Last Check-In:	09/18/2024
Membership Add-Ons:	- none -		
Linked Memberships:	1 Dependents: Current Balance Test (#62)		

Enter Member # or Name:

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

Export Member Data ×

Select Filters for Members List: Memorized Reports:

Plan Types:

Billing Status:

Billing Options:

Due Date:

Contract Begin:

Contract End:

Signup Date:

Visits Recorded:

Search Fields:

Member Flags:

Sort By:

?

- Click **Export**.

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

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	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 Dependant	Primary	ACTIVE	ACH	30.00	11/01/2024
31	Test, Correct Dependant	Dependant	ACTIVE	Monthly	10.00 d	11/01/2024
32	Test, Incorrect Depandan	Primary	ACTIVE	Monthly	30.00	11/01/2024
33	Test, Incorrect Depandan	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

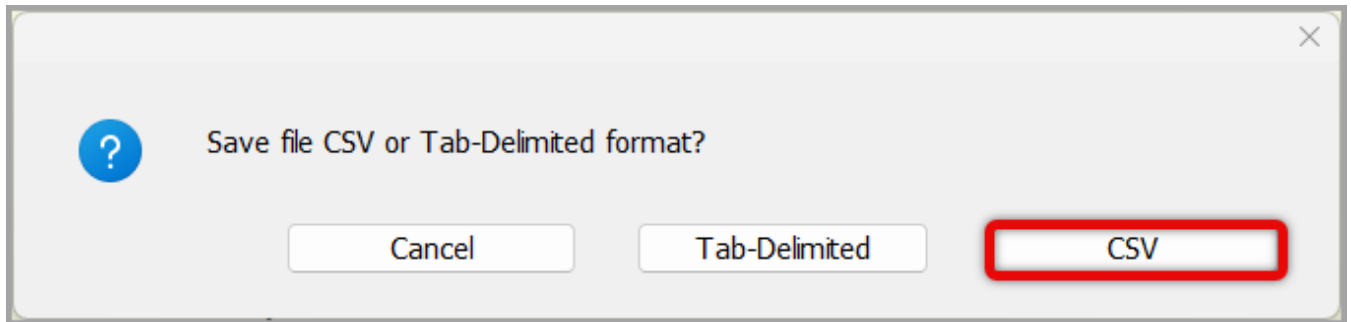
View in Browser

View

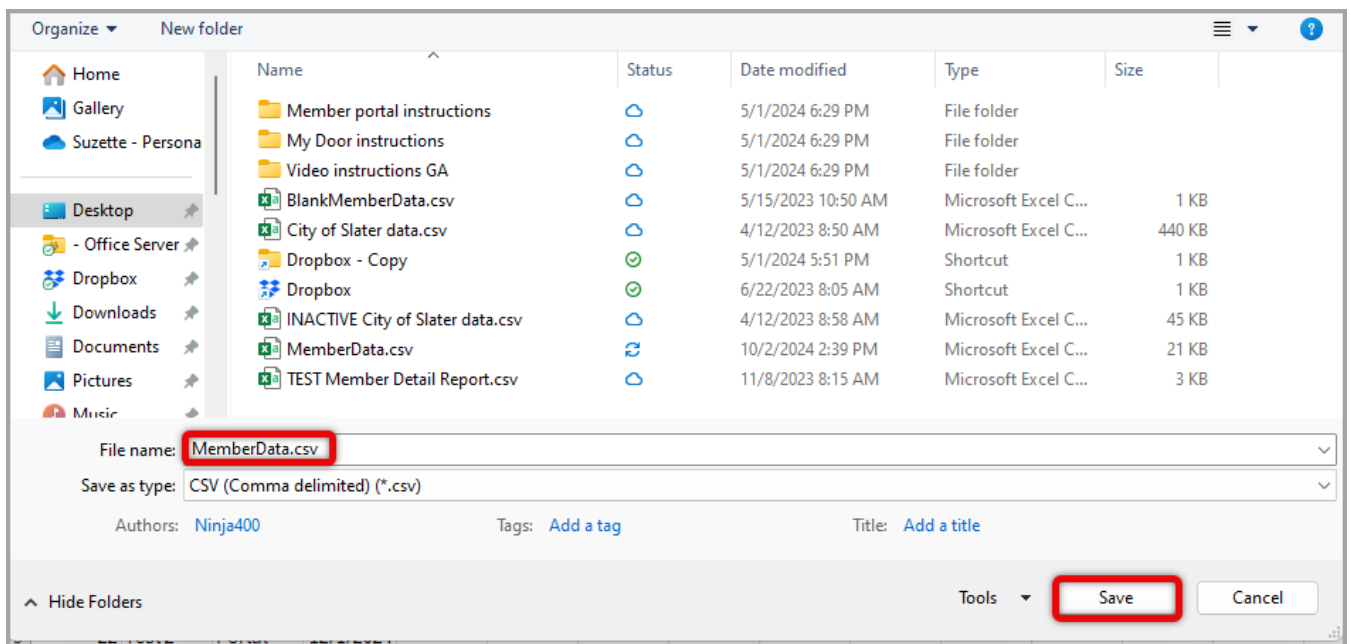
Cancel

Export

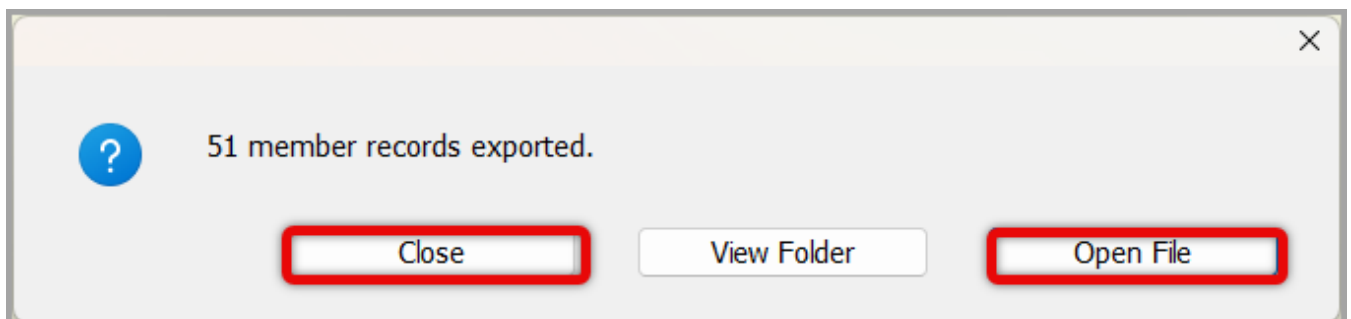
- Select CSV as the format.



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

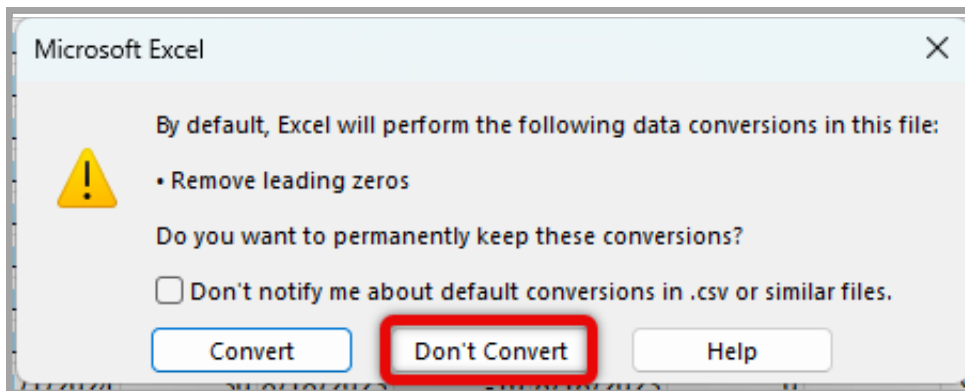


- Select **Open File** if you are making the changes to the data now or **Close** if you will open the file at a later time to make the changes.



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**).

AutoSave Off MemberData.csv • Saved to this PC

File Home Insert Page Layout Formulas Data Review View Help

Clipboard Font Alignment Number Conditional Formatting Format as Table

MemberNum

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	MemberN	LastName	FirstName	Address	Address2	CityStateZ	HomePho	MobilePh	WorkPho	MemberTy	BillingOp	DueDate	BillingAm	LastPaidD	LastPaidA	SignupDai	NumVi
2	1	Test	Missing S	16828 Kingstowne Es	Ballwin MO	63011	636-236-6834			Monthly	Credit Car	11/1/2024	10	9/4/2024	-10	6/24/2024	
3	2	Test	Test							Monthly	Credit Car	11/1/2024	10	9/12/2024	10.2	10/3/2022	
4	3	Test2	Test	16828 Kingstowne Es	Wildwood MO	6301	636-236-6834			Monthly	Credit Car	11/1/2024	10	4/5/2024	-10	10/3/2022	
5	4	Test	Primary XXX				636-236-6834			Primary	Credit Car	12/1/2024	30	9/26/2024	30.6	#####	
6	5	Test	Dependant XXX							Monthly	Monthly	12/1/2024	10	9/26/2024	10.2	#####	
7	9	Test	Void				636-236-6834			Monthly	Credit Car	10/2/2024	10	2/14/2023	-10	2/14/2023	
8	10	Test	Contract							Primary	Credit Car	11/1/2024	30	9/4/2024	-10	2/17/2023	
9	11	Endofmor	Test							Monthly	Credit Car	11/1/2024	10	3/8/2023	-10	3/8/2023	
10	12	Test	Measurement							Primary	Credit Car	11/1/2024	30	4/10/2023	-10	4/10/2023	

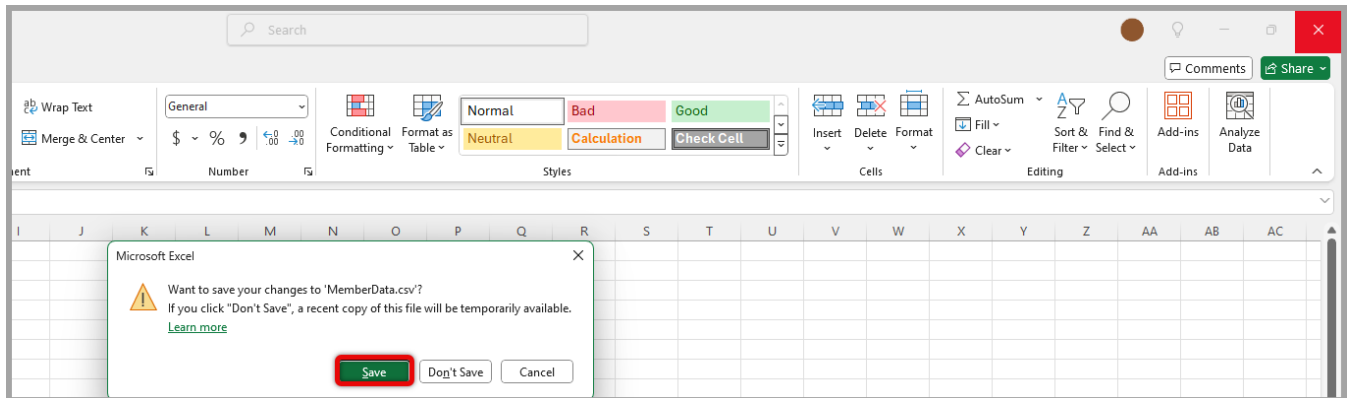
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	MemberN	LastName	FirstName	DueDate													
2	1	Test	Missing S	11/1/2024													
3	2	Test	Test	11/1/2024													
4	3	Test2	Test	11/1/2024													
5	4	Test	Primary X	12/1/2024													
6	5	Test	Dependar	12/1/2024													
7	9	Test	Void	10/2/2024													
8	10	Test	Contract	11/1/2024													
9	11	Endofmor	Test	11/1/2024													
10	12	Test	Measuren	11/1/2024													

- Make the change to the column to reflect the bulk change you want to the data in that column (in this example I have moved all due dates to 12/1/2024).

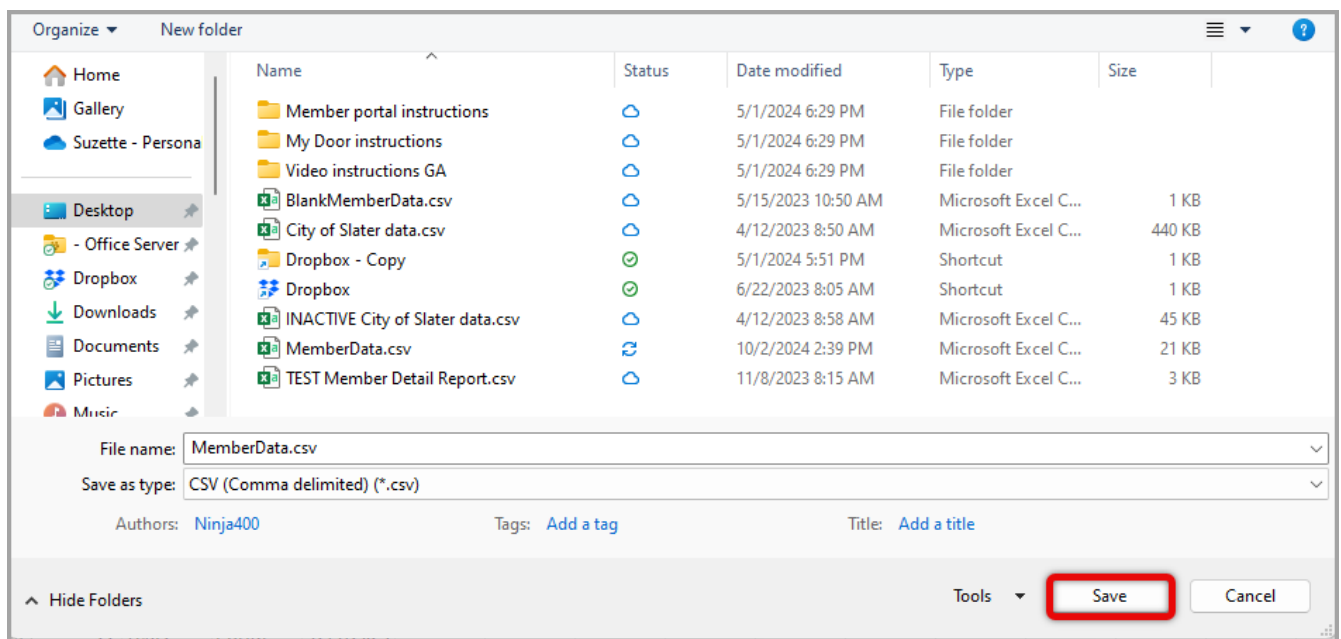
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	MemberN	LastName	FirstName	DueDate													
2	1	Test	Missing S	12/1/2024													
3	2	Test	Test	12/1/2024													
4	3	Test2	Test	12/1/2024													
5	4	Test	Primary X	12/1/2024													
6	5	Test	Dependar	12/1/2024													
7	9	Test	Void	12/1/2024													
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.



- 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.

Gym Assistant - Mini 250 | 'ORVILLE' (#4) on 'ORVILLE' | Path=C:\Gym Assistant 2.6\Data


File Edit Member Reports Billing Documents Portal Settings Utilities Help

# #2 Test Test

**Membership Up-to-Date!**

0 visits this month, 17 last month, 19 total

Personal	Contract	Billing	Other	✖ Waivers
Billing Plan:	Monthly	Due Date:	11/0	
Billing Option:	Credit Card	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:	- none -			
Linked Memberships:	1 Dependents: Current Balance Test (#62)			

 Enter Member # or Name:

☐ Basic Display ☒ Display GateKeeper Check-ins

0 of 200 me

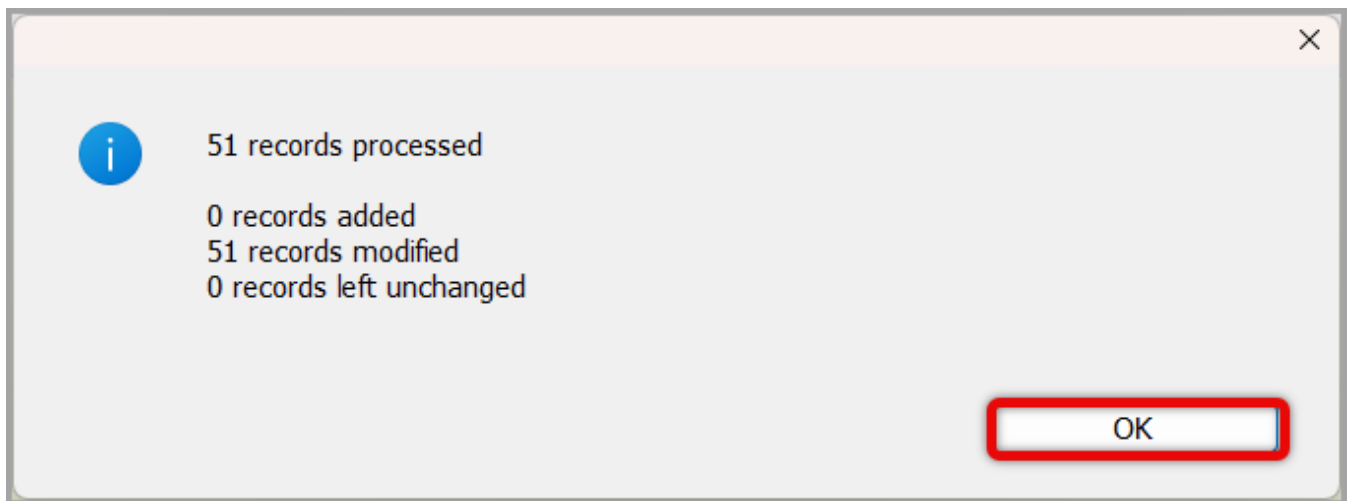
- Select data format **CSV or Tab-Delimited**,

?

Select data format:



- 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>