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 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 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

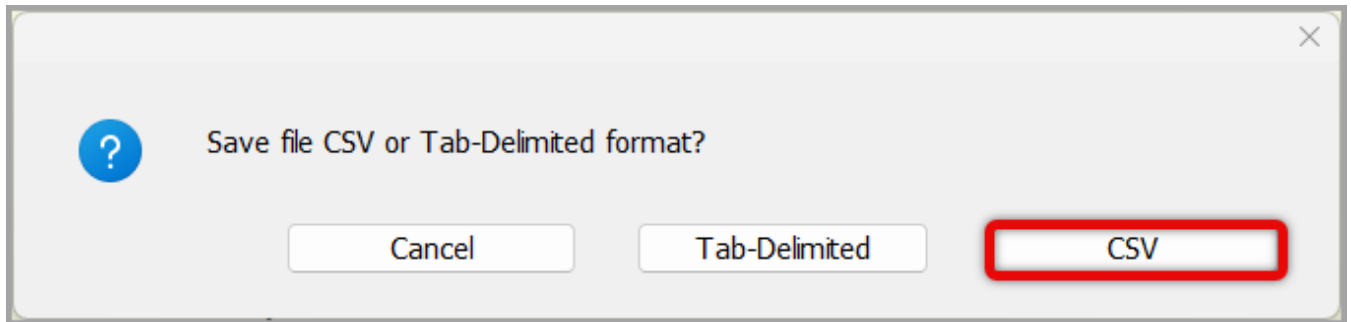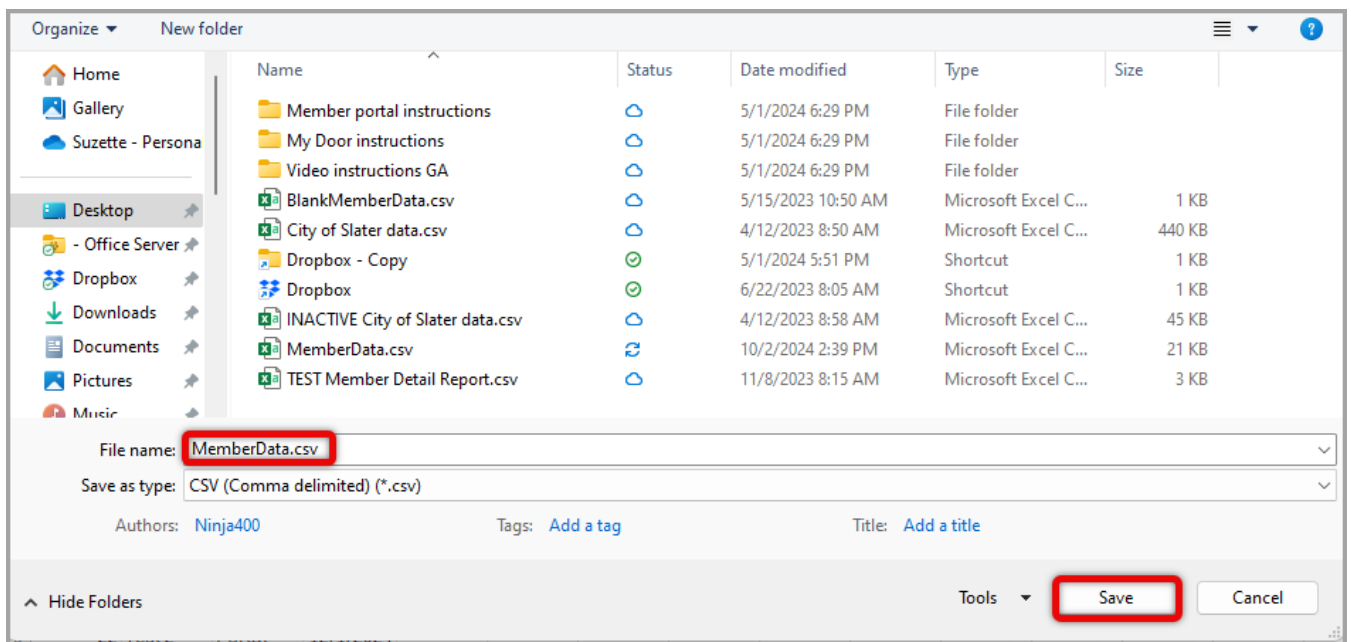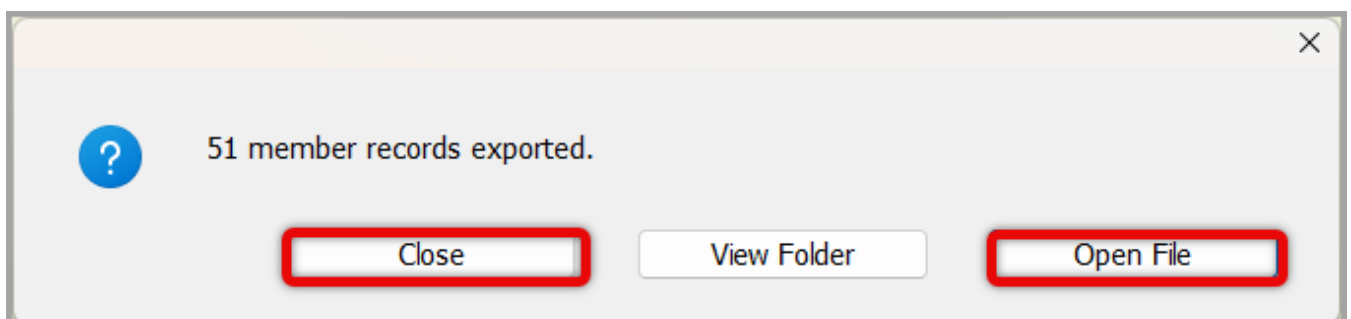Print   Save   Copy   View in Browser   View   Cancel   Export

- Select **CSV** as the format.

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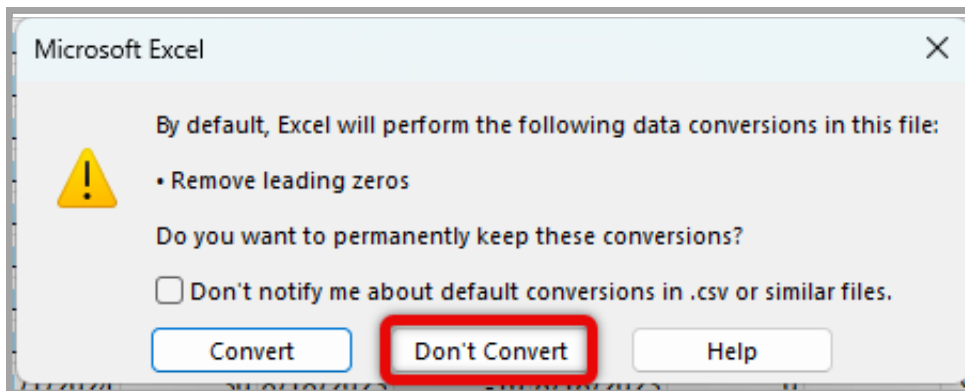

- Select **Open File** if you are making the changes to the data now or **Close** if you will open the file at a later time to make the changes.

Making changes to the report to update data:

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

Microsoft Excel

⚠ By default, Excel will perform the following data conversions in this file:

• Remove leading zeros

Do you want to permanently keep these conversions?

☐ Don't notify me about default conversions in .csv or similar files.

[Convert] [**Don't Convert**] [Help]

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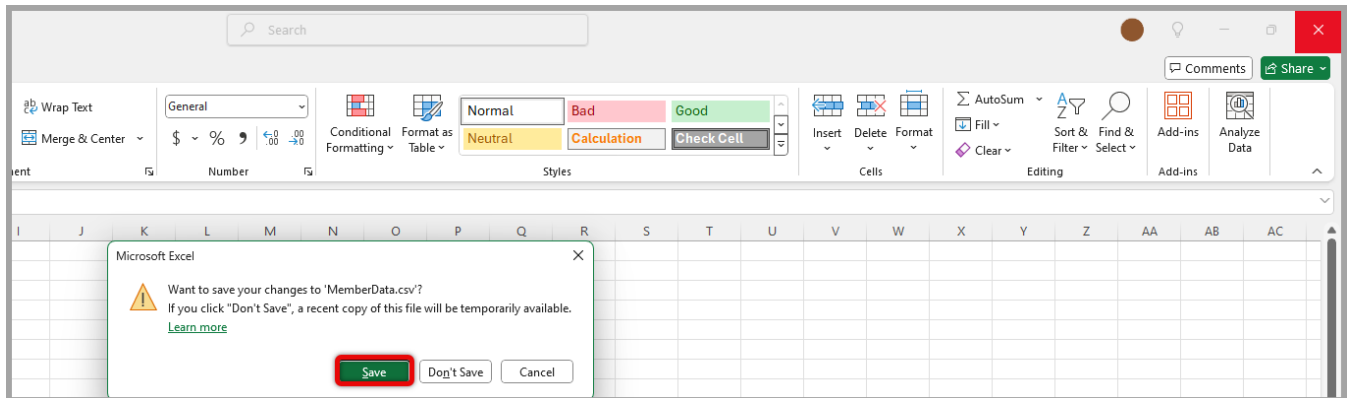
- Click **Save** next making sure to save it to someplace on the computer where it will be easily located.
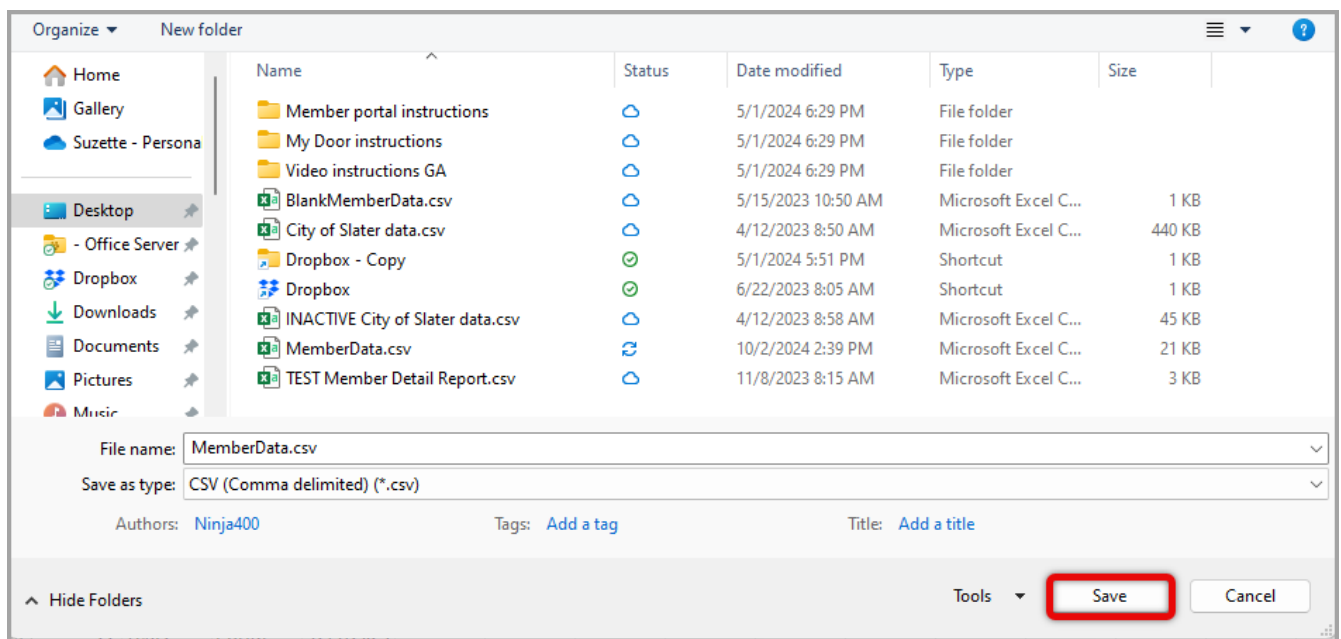
Merging the data into Gym Assistant

- Open Gym Assistant: type ***merge members*** into the enter member # or name field on Gym Assistant member record and click enter on your keyboard.
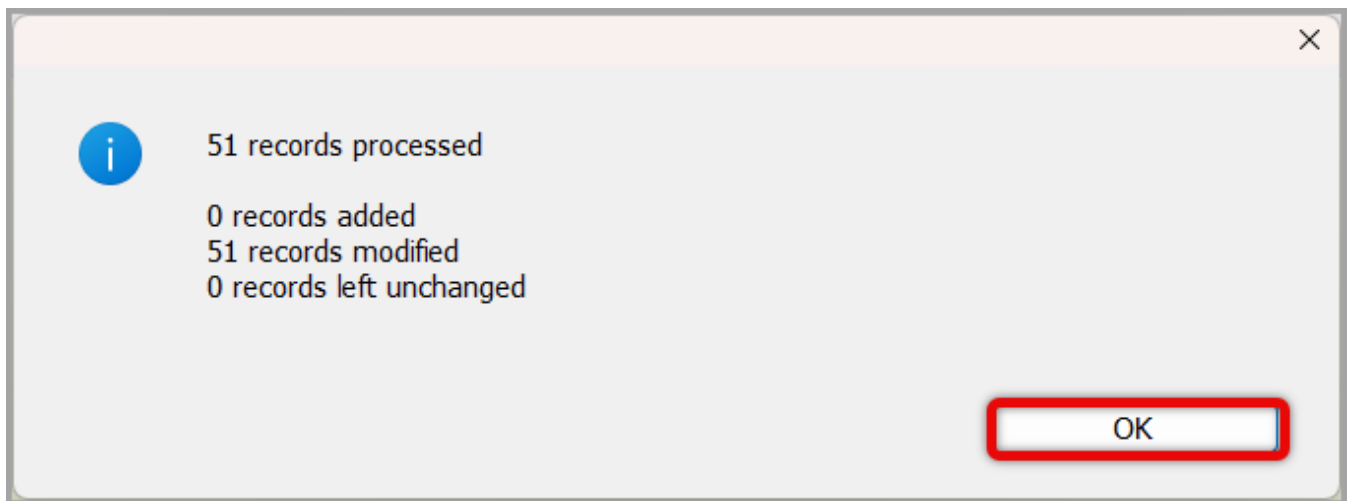
- Select data format **CSV or Tab-Delimited,**

- 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.