

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

File Edit Member Reports Billing Documents Portal Settings Utilities Help

#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

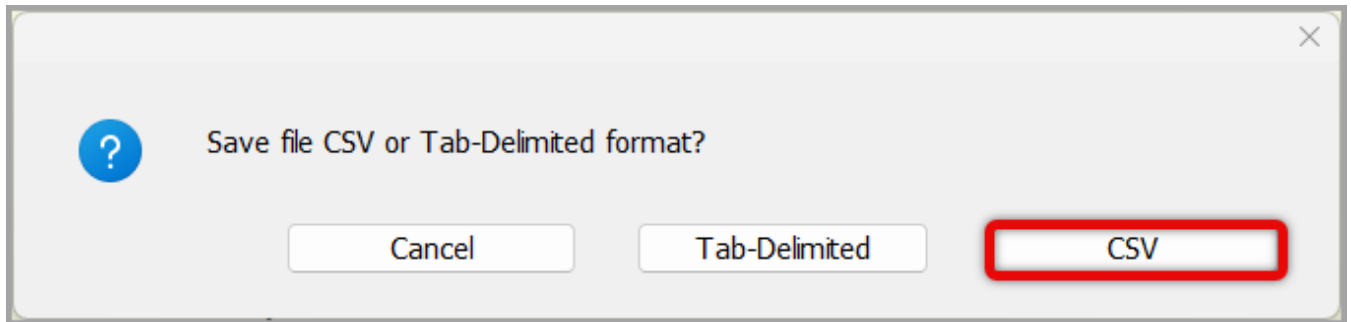
View in Browser

View

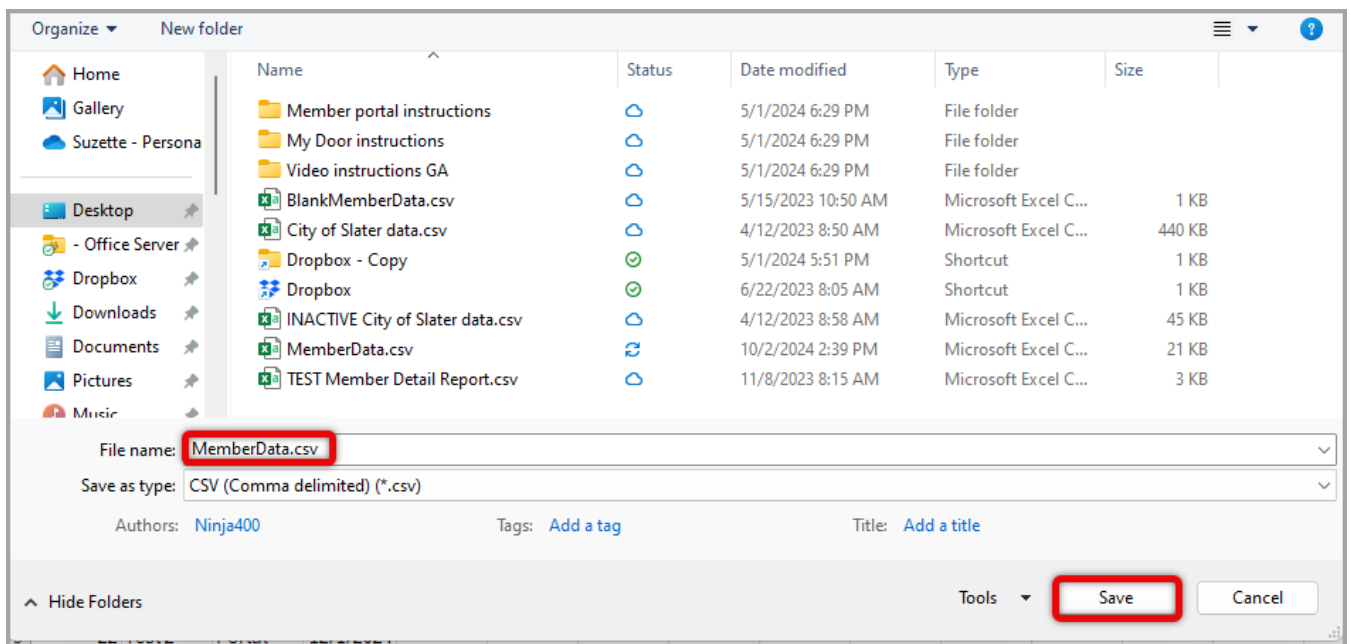
Cancel

Export

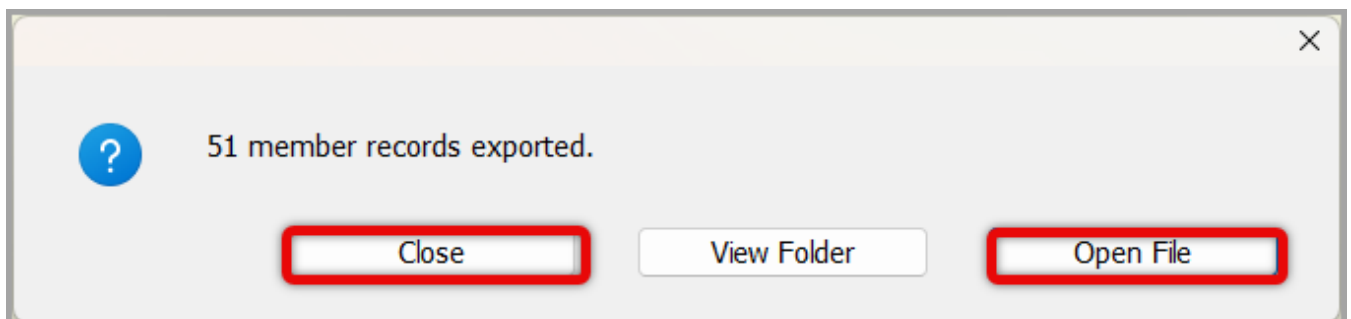
- Select CSV as the format.



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

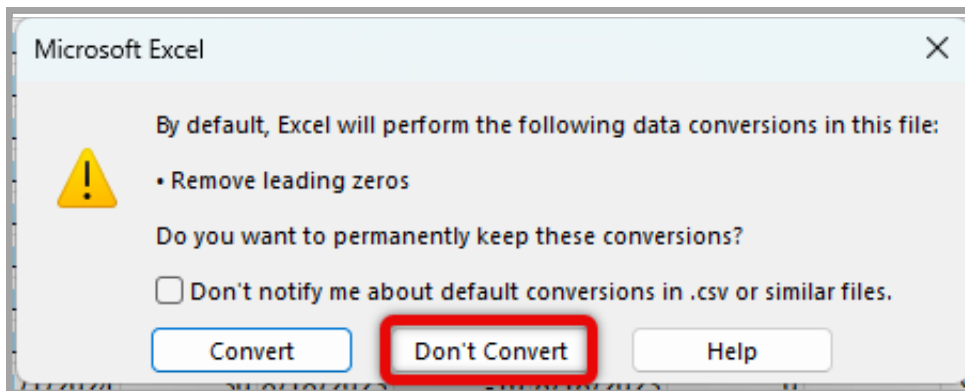


- Select **Open File** if you are making the changes to the data now or **Close** if you will open the file at a later time to make the changes.



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

MemberN	LastName	FirstName	Address	Address2	CityStateZi	HomePho	MobilePhc	WorkPhor	MemberTy	BillingOp	DueDate	BillingAm	LastPaidD	LastPaidA	SignupDai	NumVi
1	Test	Missing Si	16828	Kingstowne Es	Ballwin MO	63011	636-236-6834		Monthly	Credit Car	11/1/2024	10	9/4/2024	-10	6/24/2024	
2	Test	Test							Monthly	Credit Car	11/1/2024	10	9/12/2024	10.2	10/3/2022	
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	
4	Test	Primary XXX					636-236-6834		Primary	Credit Car	12/1/2024	30	9/26/2024	30.6	#####	
5	Test	Dependant XXX							Monthly	Monthly	12/1/2024	10	9/26/2024	10.2	#####	
7	Test	Void					636-236-6834		Monthly	Credit Car	10/2/2024	10	2/14/2023	-10	2/14/2023	
8	Test	Contract							Primary	Credit Car	11/1/2024	30	9/4/2024	-10	2/17/2023	
9	Test	Endofmor							Monthly	Credit Car	11/1/2024	10	3/8/2023	-10	3/8/2023	
10	Test	Measurement							Primary	Credit Car	11/1/2024	30	4/10/2023	-10	4/10/2023	

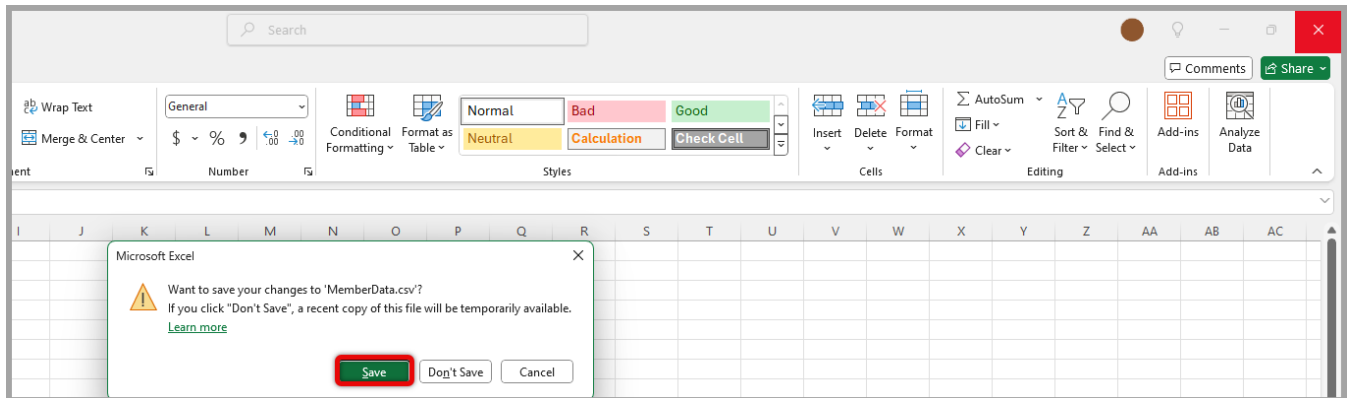
MemberN	LastName	FirstName	DueDate
1	Test	Missing Si	11/1/2024
2	Test	Test	11/1/2024
3	Test2	Test	11/1/2024
4	Test	Primary X	12/1/2024
5	Test	Dependar	12/1/2024
7	Test	Void	10/2/2024
8	Test	Contract	11/1/2024
9	Test	Endofmor	11/1/2024
10	Test	Measuren	11/1/2024

- 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).

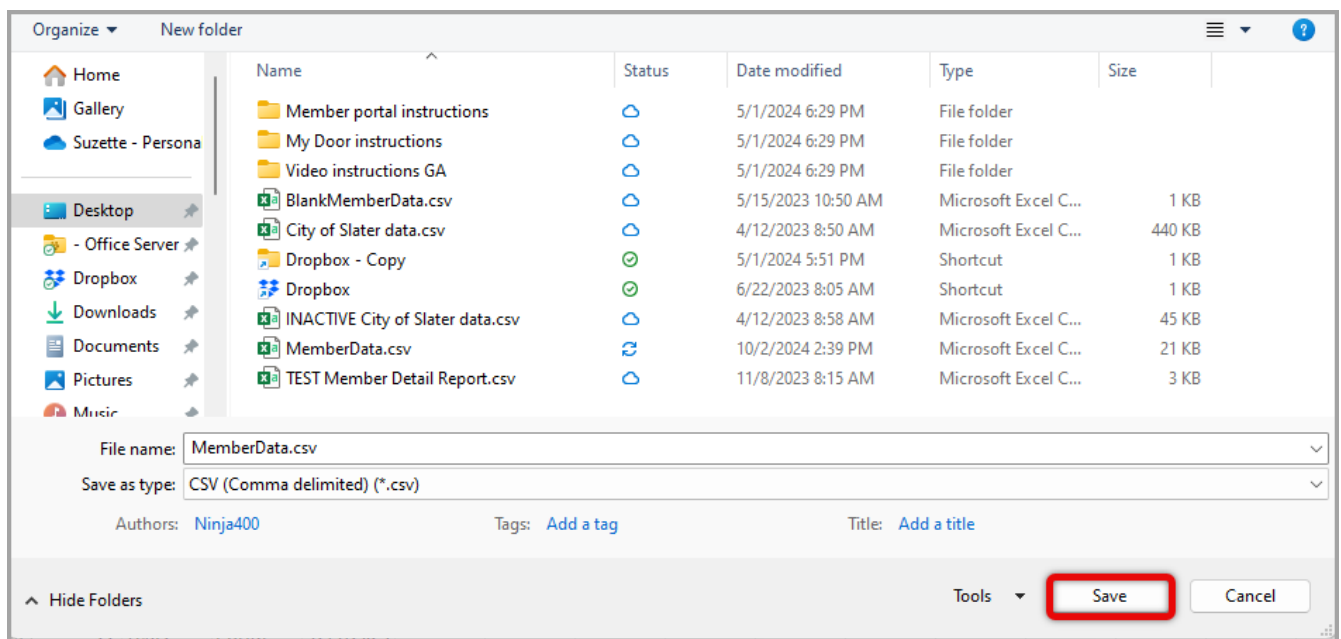
MemberN	LastName	FirstName	DueDate
1	Test	Missing S	12/1/2024
2	Test	Test	12/1/2024
3	Test2	Test	12/1/2024
4	Test	Primary X	12/1/2024
5	Test	Dependar	12/1/2024
7	Test	Void	12/1/2024
8	Test	Contract	12/1/2024
9	Test	Endofmor	12/1/2024
10	Test	Measuren	12/1/2024

- 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

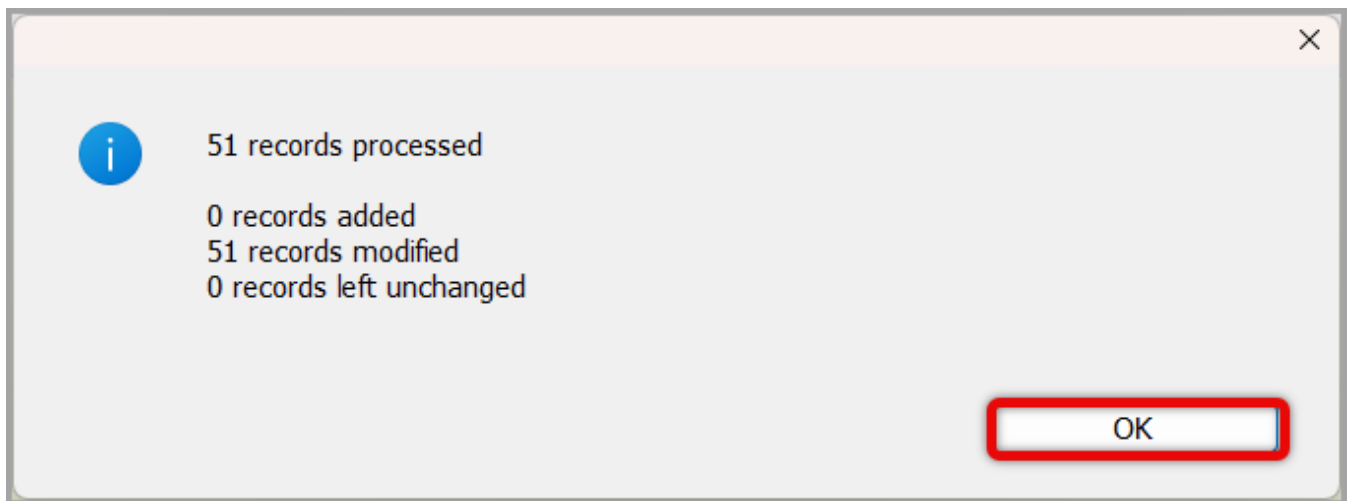
0 of 200 me

- 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>