

How to Add a Fee in Gym Assistant 1

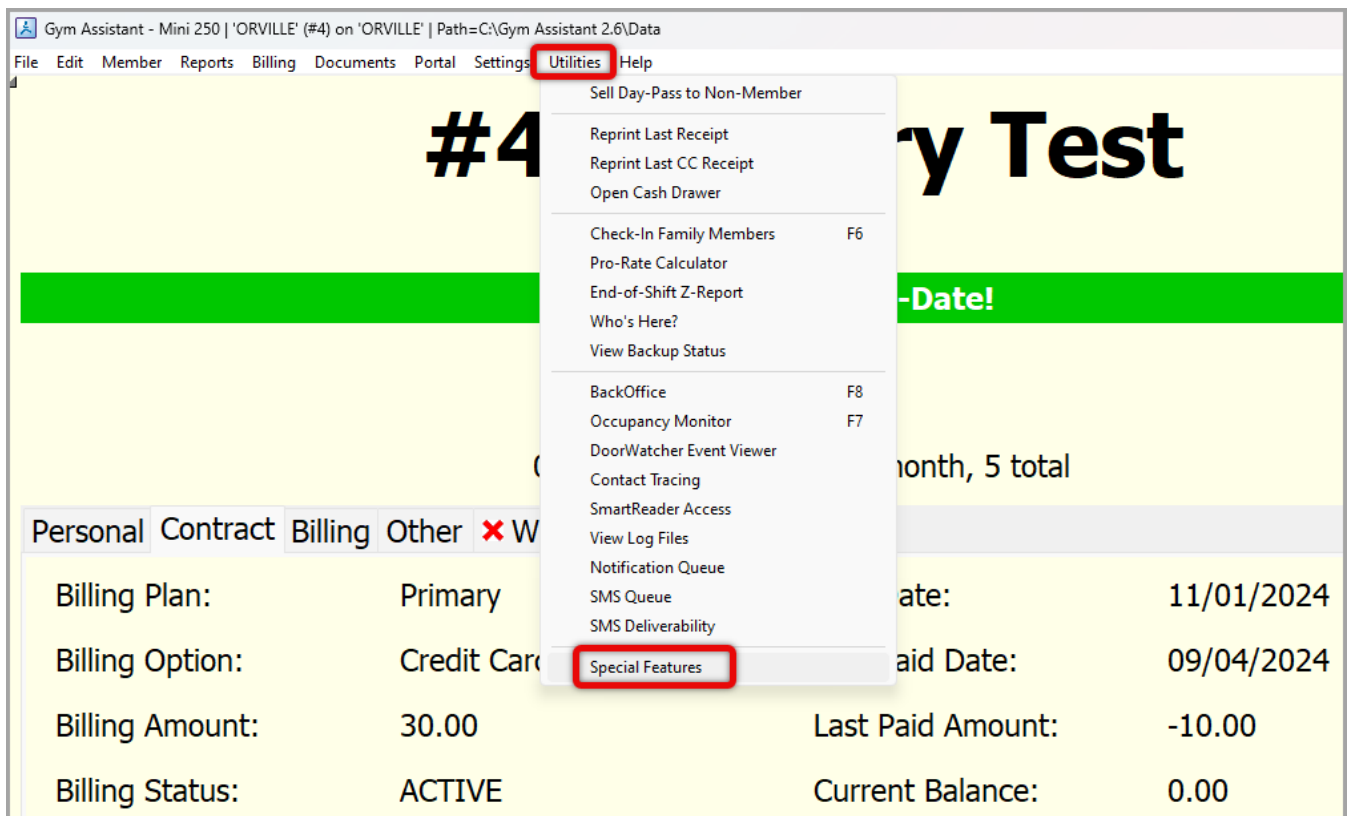
How to Add a Fee in Gym Assistant September 2024

Introduction

Provides the ability to add a monthly, quarterly, yearly etc. fee to a member account that will be added to the profile and charged the next due date.

Before you begin create a backup file, refer to article **How to Manually Create a Backup for instructions.**

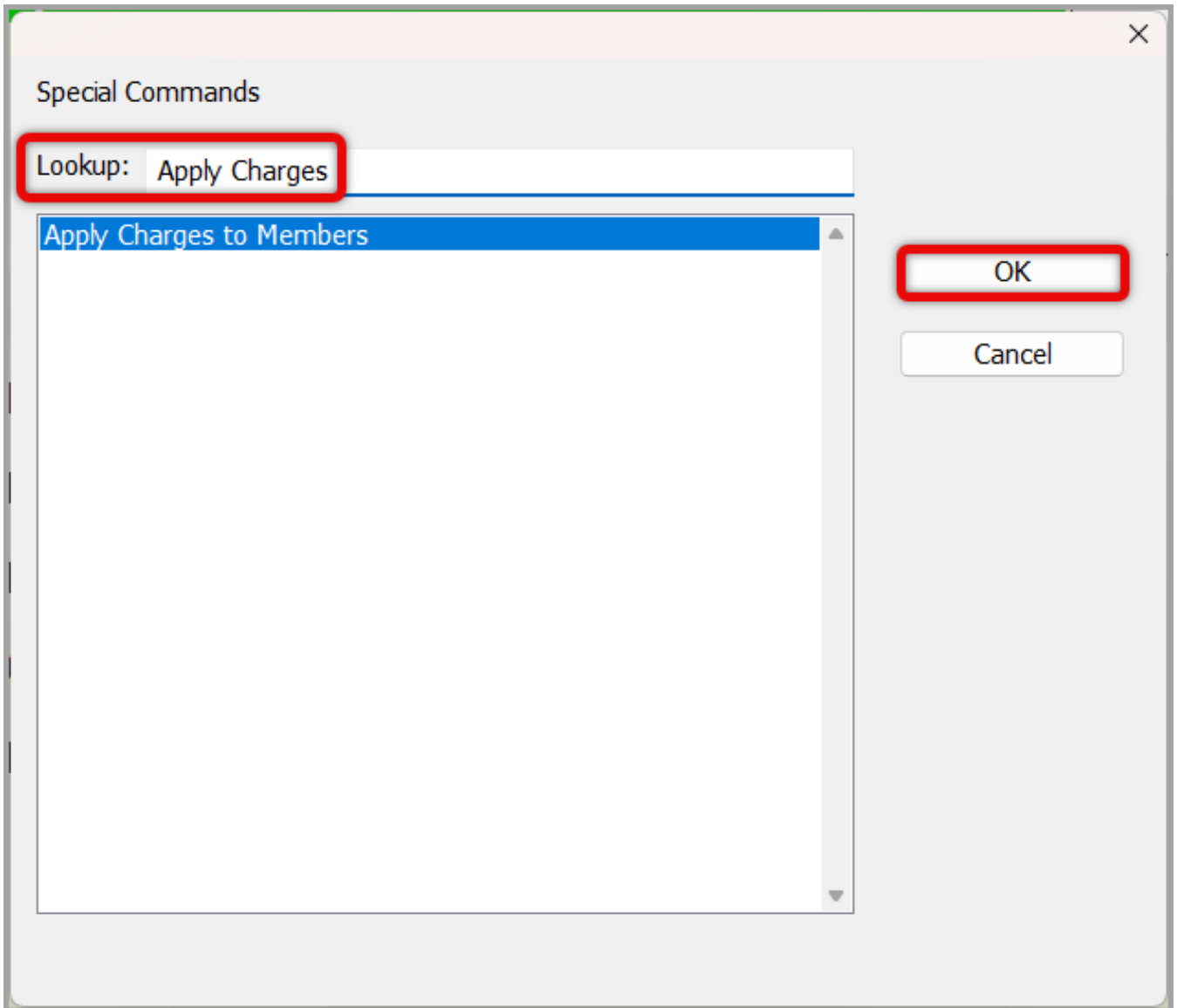
- Begin by going to **Utilities > Special Features.**



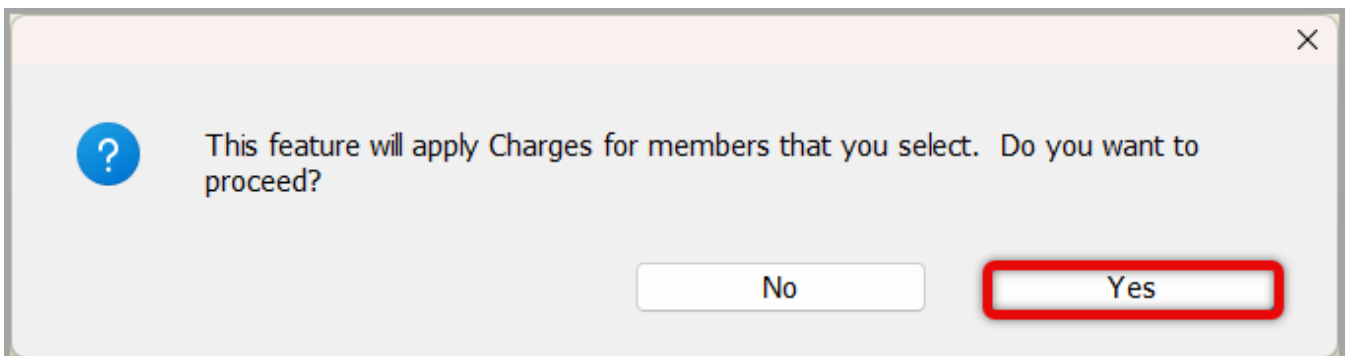
The screenshot shows the Gym Assistant software interface. The 'Utilities' menu is open, and 'Special Features' is highlighted. The background shows a member's profile for '#4' with a 'Billing' tab selected. The billing information is as follows:

Personal	Contract	Billing	Other	W
Billing Plan:	Primary			
Billing Option:	Credit Card			
Billing Amount:	30.00			
Billing Status:	ACTIVE			
Due Date:				11/01/2024
Next Paid Date:				09/04/2024
Last Paid Amount:				-10.00
Current Balance:				0.00

- Type **Apply Charges to Members** into the **Lookup** > click on it highlighting it in Blue > click **OK**.



- Click **Yes** to apply charges for members that you select.



- Select Filters for Members List you would like included to have this fee added
> **Generate List.**

Select Members

Select Filters for Members List:

Plan Types:

Billing Status:

Billing Options:

Due Date:

Contract Begin:

Contract End:

Signup Date:

Visits Recorded:

Search Fields:

Member Flags:

Sort By:

Memorized Reports:

- Review the list to confirm the list is accurate > click **Continue**

List for Charges [Suzette's Gym 09/24/2024]

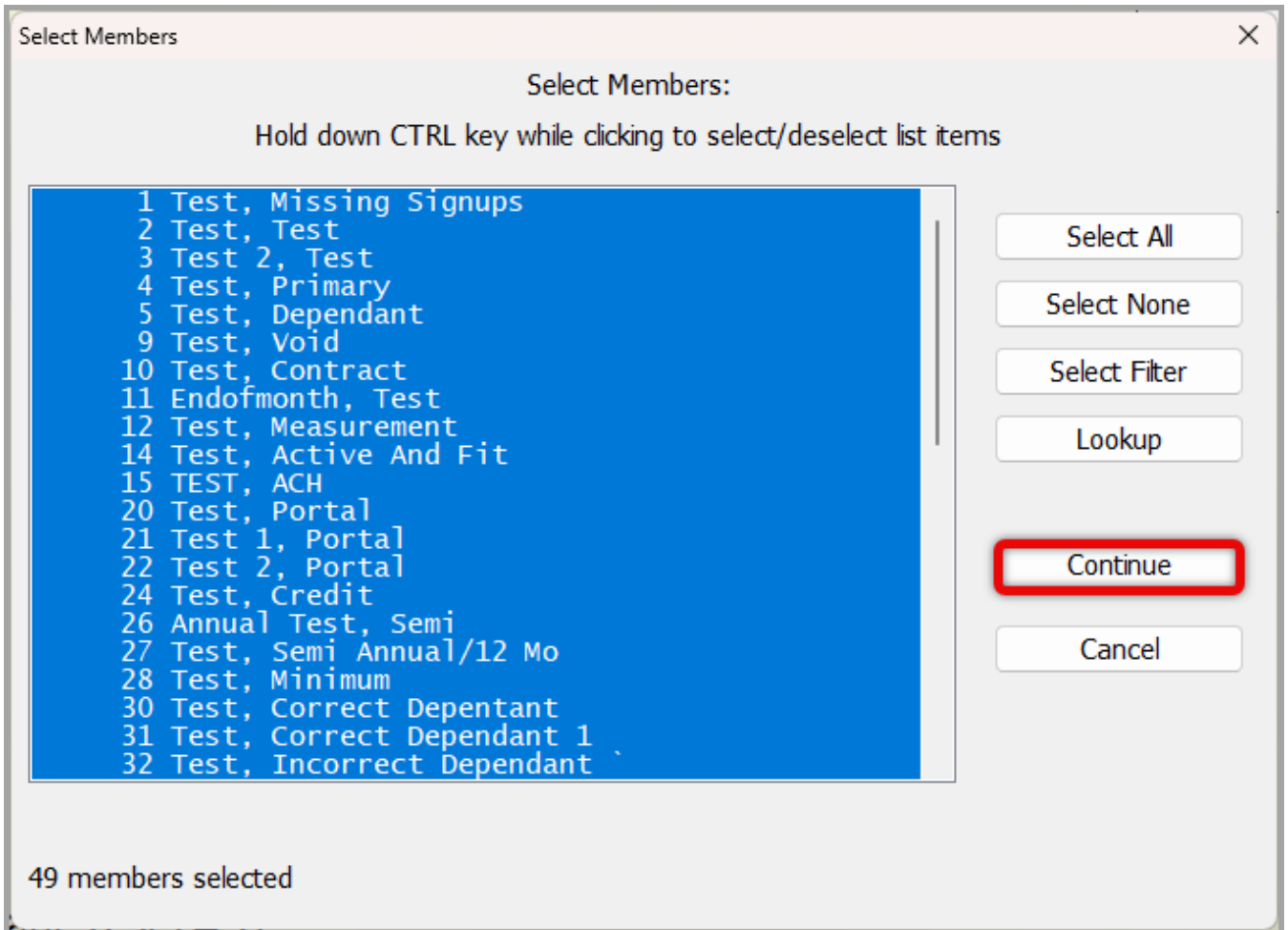
Member Number	Member Name	Membership Type	Billing Status	Billing Option	Billing Amount	Due Date
1	Test, Missing Signups	Monthly	ACTIVE	Credit Card	10.00	11/01/2024
2	Test, Test	Monthly	ACTIVE	Credit Card	10.00	11/01/2024
3	Test 2, Test	Monthly	ACTIVE	Credit Card	10.00	11/01/2024
4	Test, Primary	Primary	ACTIVE	Credit Card	30.00	11/01/2024
5	Test, Dependant	Monthly	ACTIVE	Monthly	10.00	d 11/01/2024
9	Test, Void	Monthly	ACTIVE	Monthly	10.00	11/01/2024
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
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
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 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: Membership
 Billing Status: Active
 Home Club: ALL

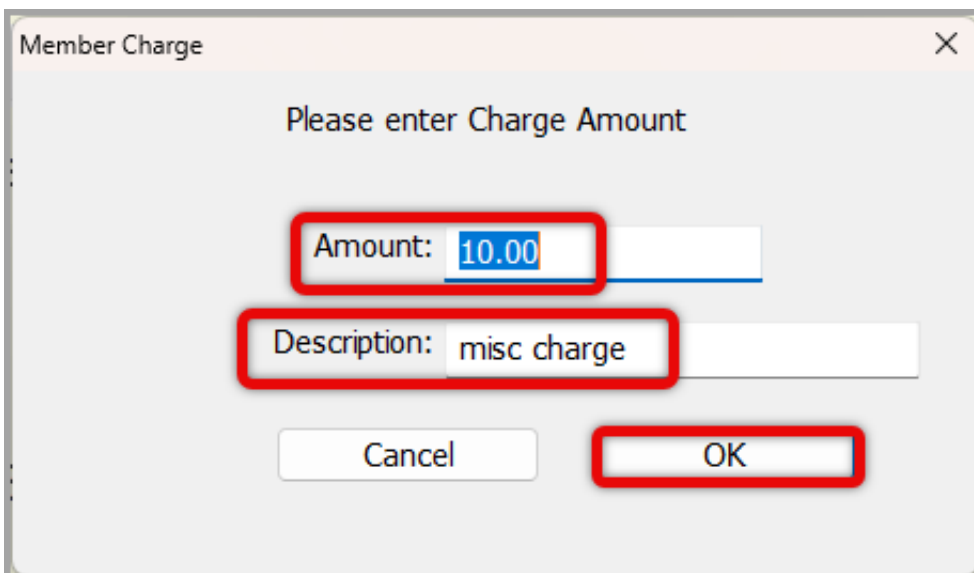
Sorted by: Membership Number

Print Save Copy View in Browser View Cancel **Continue** ?

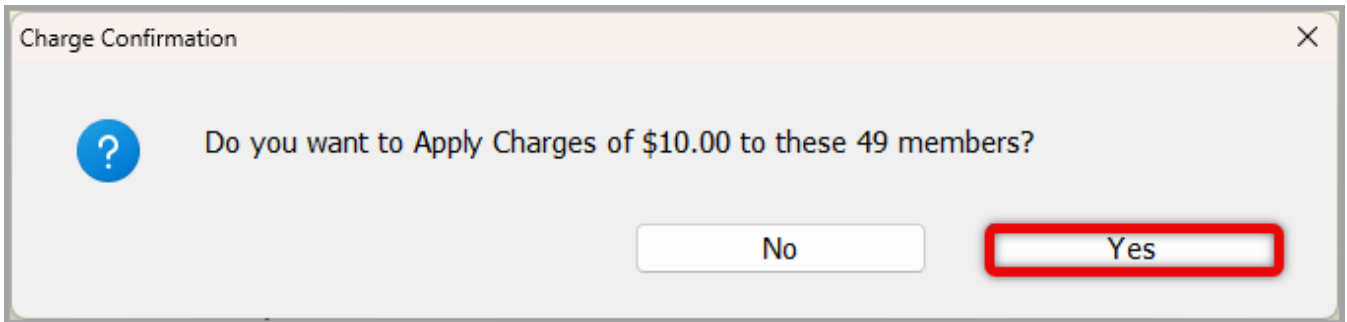
- Choose options to again verify the member list and remove members included in the list if necessary > click **Continue**.



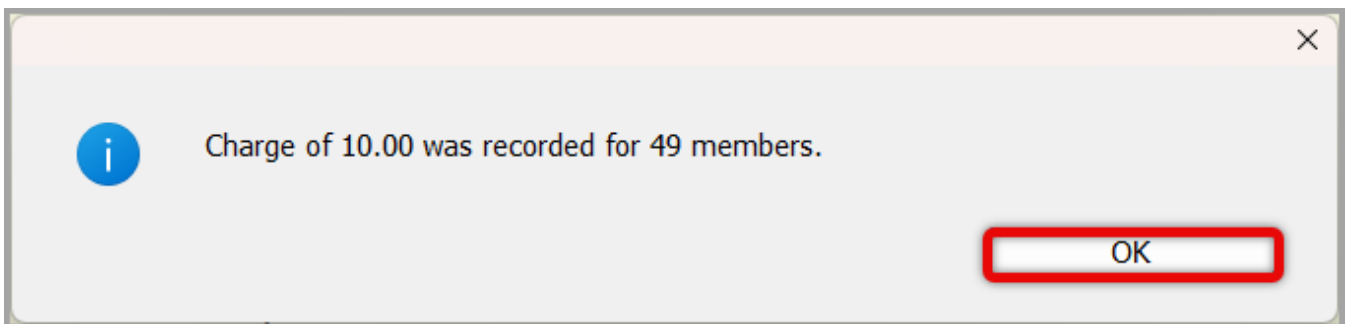
- Enter the **Amount** and **Description** > click **OK**.



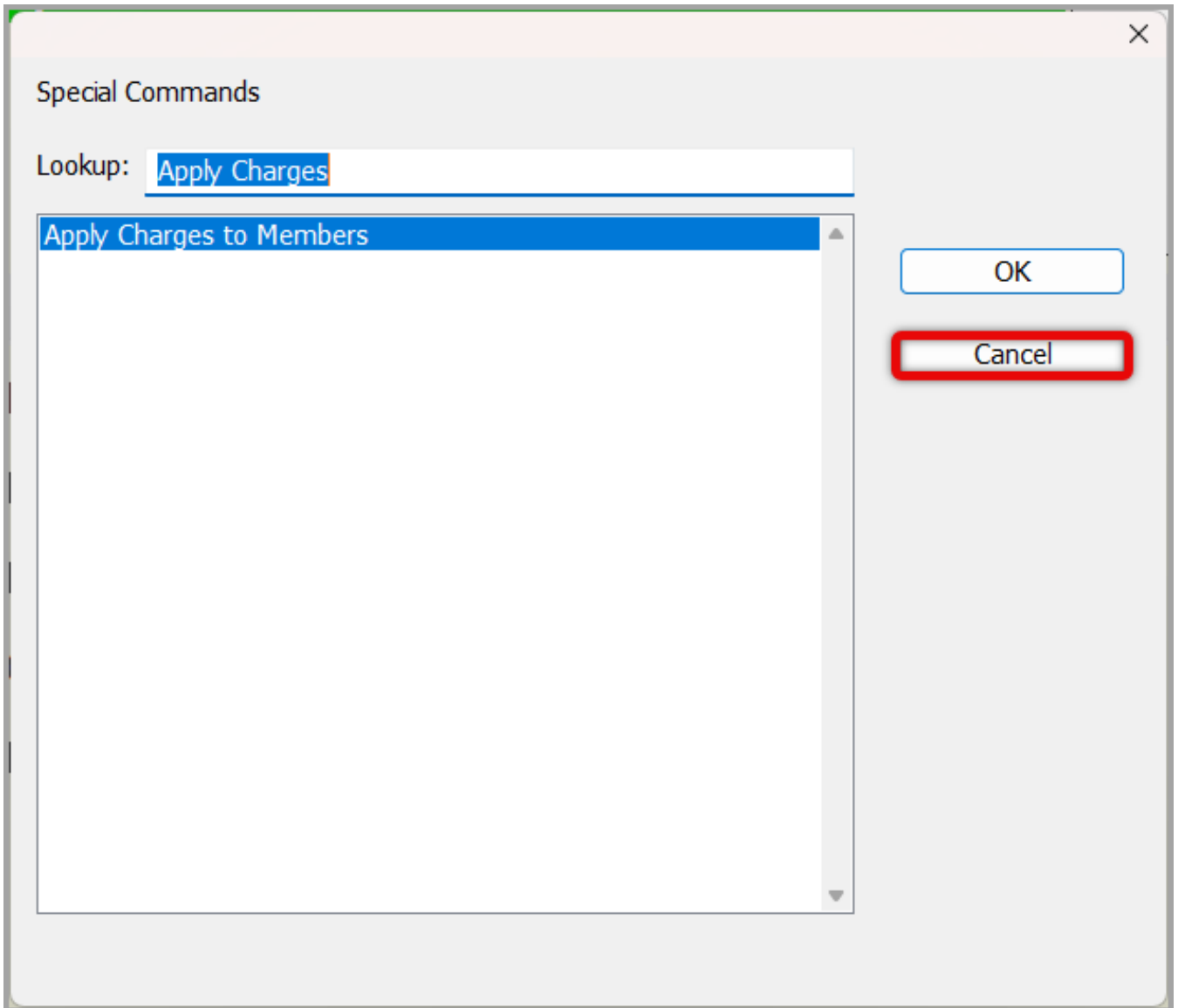
- Click **Yes** or **No** to verify that you do want to Apply Charges to these members.



- Click **OK** on the next page verifying that a charge will be added for selected members.



- The screen will then go back to the beginning > click **Cancel**.



The charge can now be seen on the profiles of each member being charged to the right of **Current Balance** and in red.

#4 Primary Test

Membership Up-to-Date!

0 visits this month, 0 last month, 5 total

Personal Contract Billing Other **✖ Waivers**

Billing Plan:	Primary	Due Date:	11/01/2024
Billing Option:	Credit Card	Last Paid Date:	09/04/2024
Billing Amount:	30.00	Last Paid Amount:	-10.00
Billing Status:	ACTIVE	Current Balance:	10.00
Terminate Billing:	Never	Last Check-In:	02/23/2024 01:40P

Membership Add On: none

Online URL: <https://gymassistant.phpkb.cloud/article/how-to-add-a-fee-in-gym-assistant-1.html>