

How to Add a Fee in Gym Assistant 1

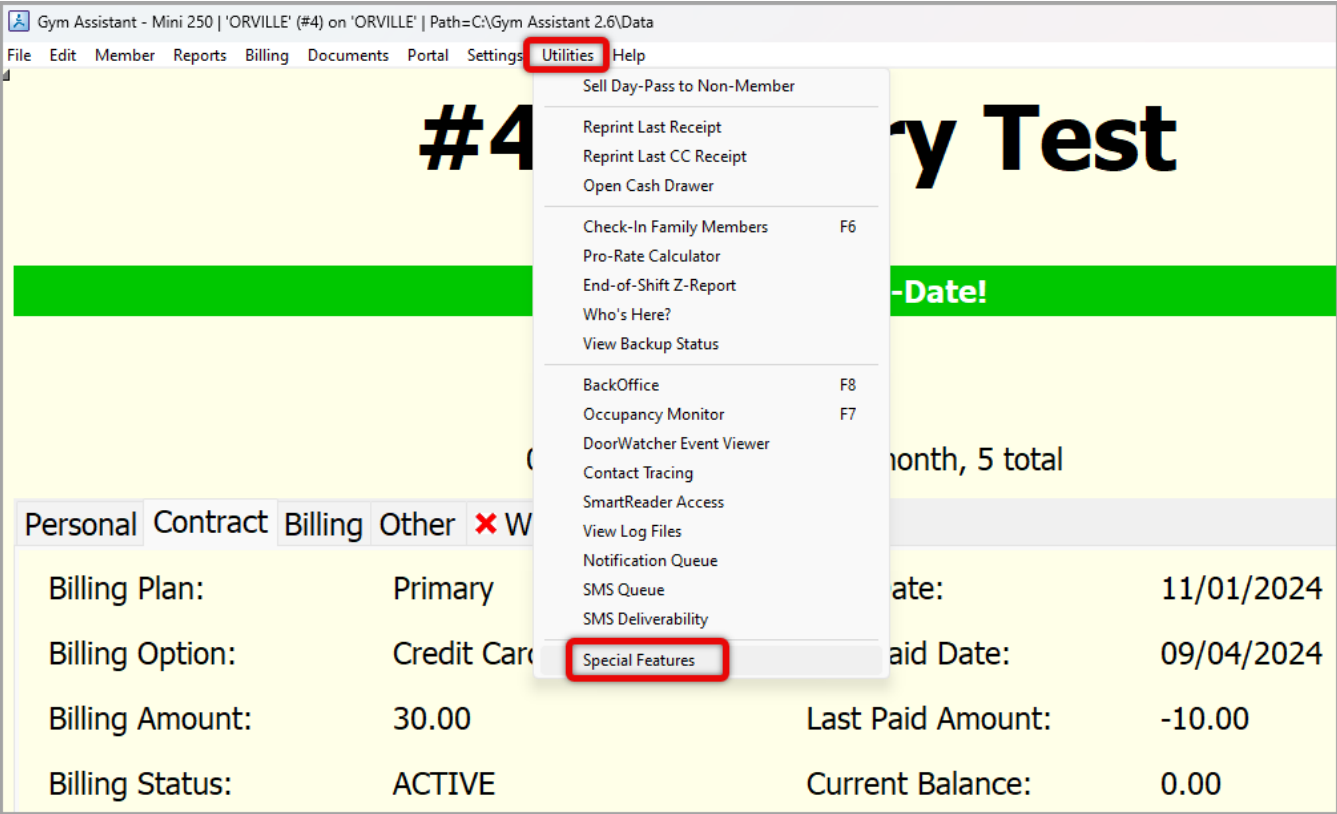
How to Add a Fee in Gym Assistant September 2024

Introduction

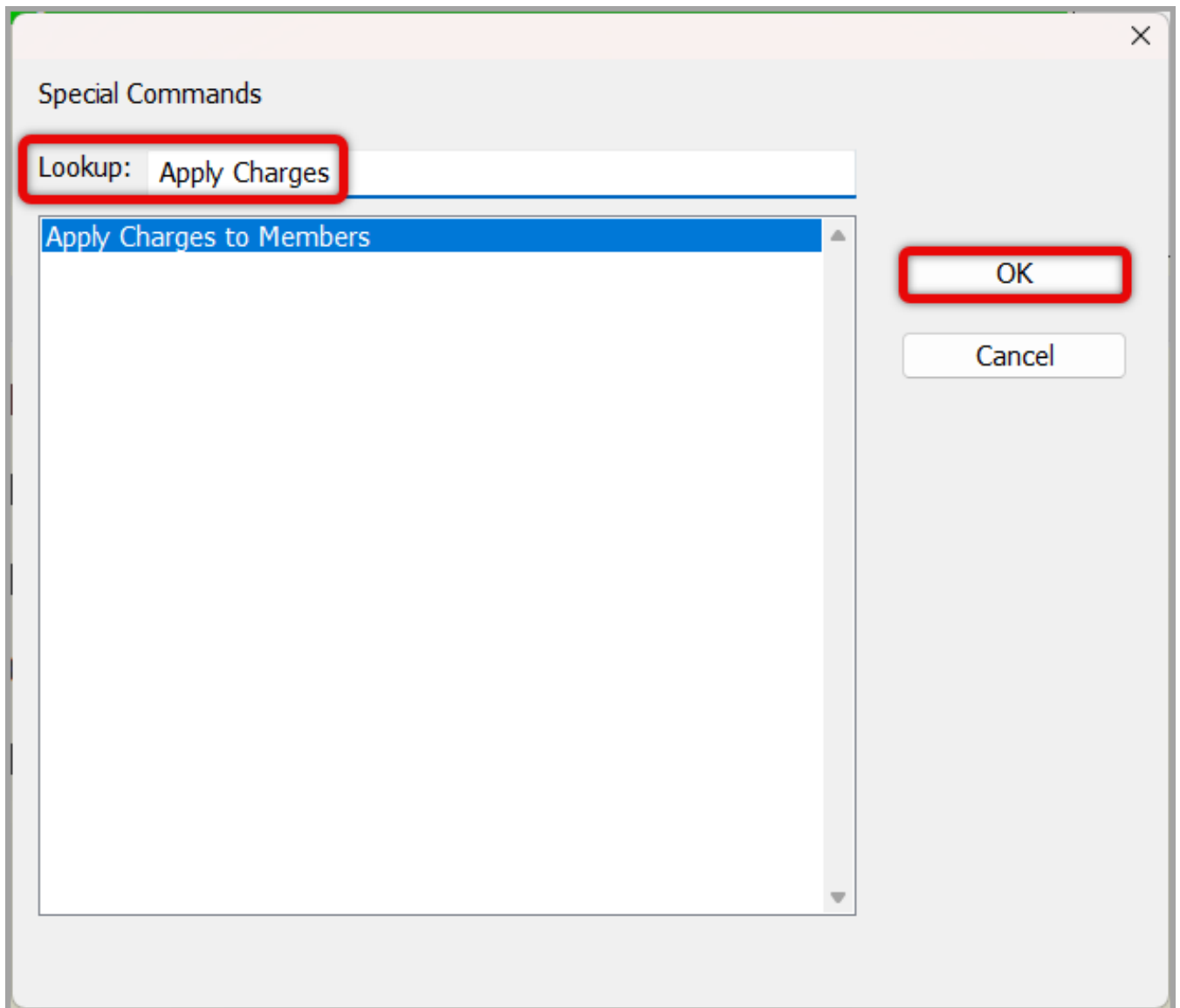
Provides the ability to add a monthly, quarterly, yearly etc. fee to a member account that will be added to the profile and charged the next due date.

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

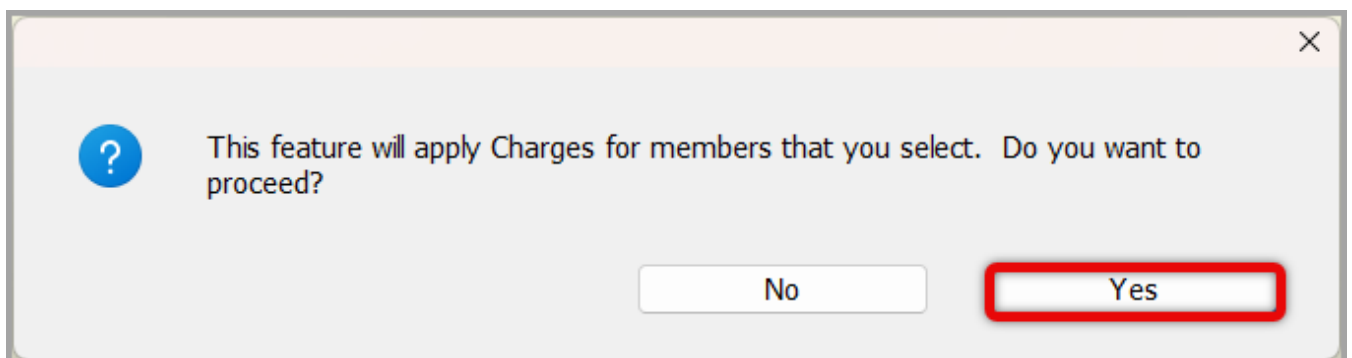
- Begin by going to **Utilities > Special Features.**



- 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**.

Select Members

Select Members:

Hold down CTRL key while clicking to select/deselect list items

1	Test, Missing Signups
2	Test, Test
3	Test 2, Test
4	Test, Primary
5	Test, Dependant
9	Test, Void
10	Test, Contract
11	Endofmonth, Test
12	Test, Measurement
14	Test, Active And Fit
15	TEST, ACH
20	Test, Portal
21	Test 1, Portal
22	Test 2, Portal
24	Test, Credit
26	Annual Test, Semi
27	Test, Semi Annual/12 Mo
28	Test, Minimum
30	Test, Correct Dependant
31	Test, Correct Dependant 1
32	Test, Incorrect Dependant

49 members selected

Select All
Select None
Select Filter
Lookup
Continue
Cancel

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

Member Charge

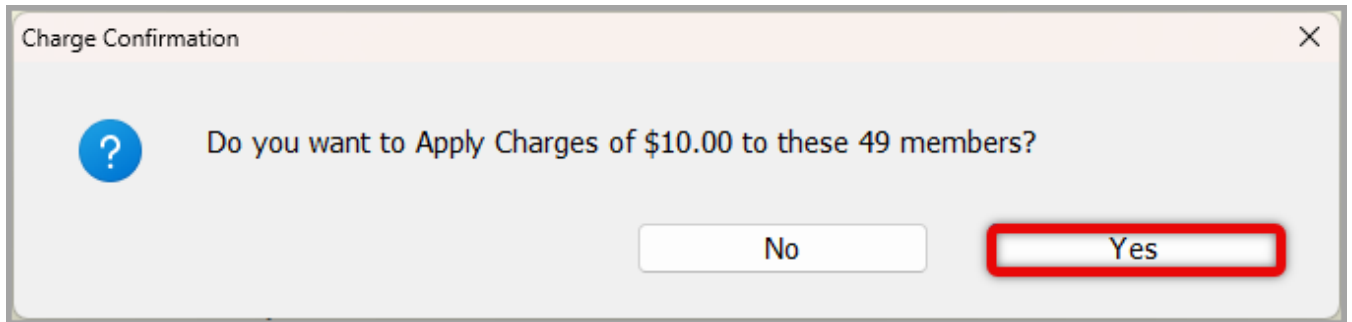
Please enter Charge Amount

Amount: 10.00

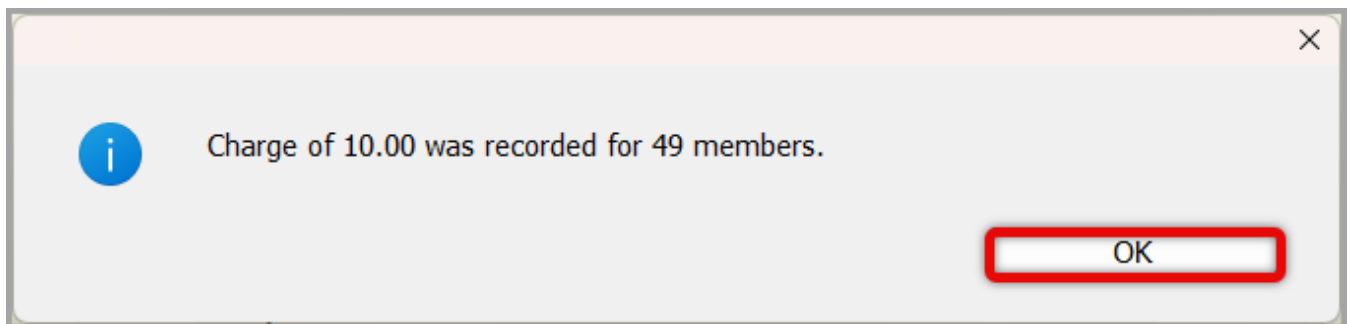
Description: misc charge

Cancel OK

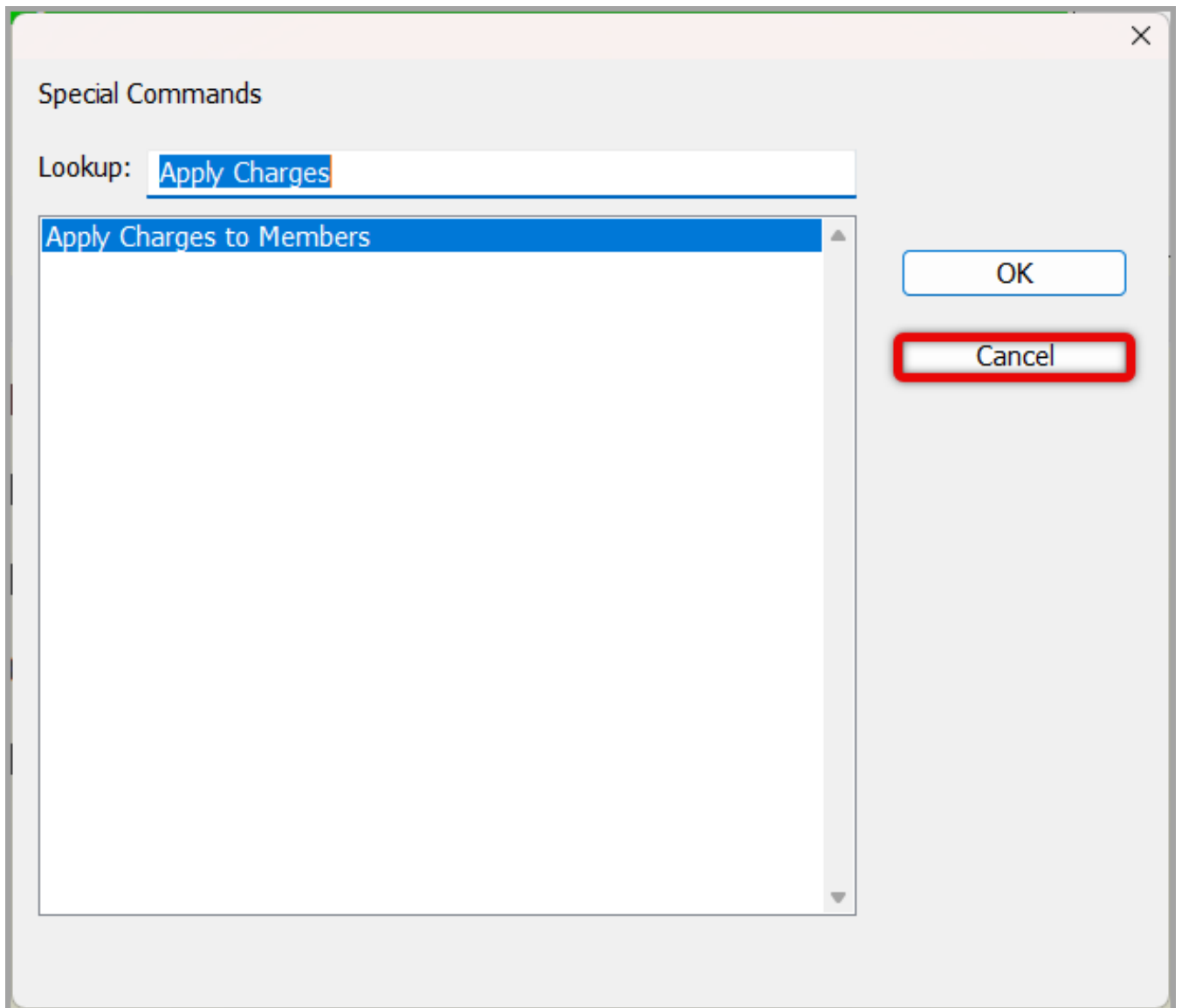
- Click **Yes** or **No** to verify that you do want to Apply Charges to these members.



- 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>