How to Add a Credit in Gym Assistant

**How to Add a Credit in Gym Assistant September 2024**

Introduction
Provides the ability to add a monthly, quarterly, yearly, etc. credit to a member account that will be credited automatically on the next billing date.

Before you begin create a backup file, refer to article **How to Manually Create a Backup in Gym Assistant** for instructions.
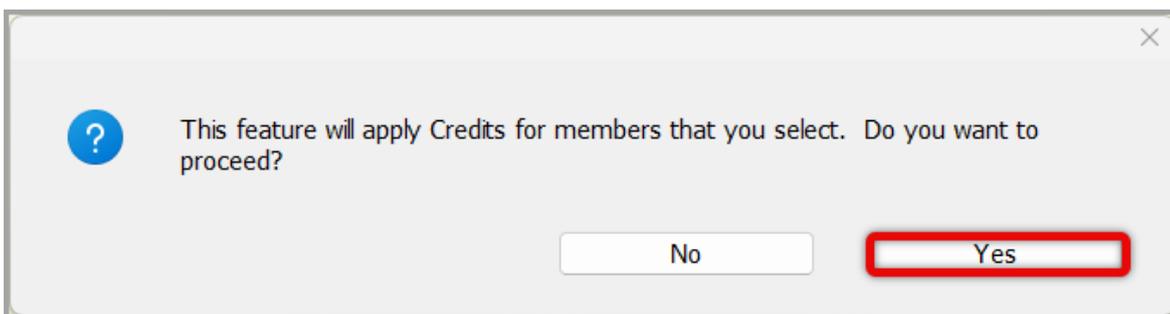
- Begin by going to **Utilities > Special Features**.
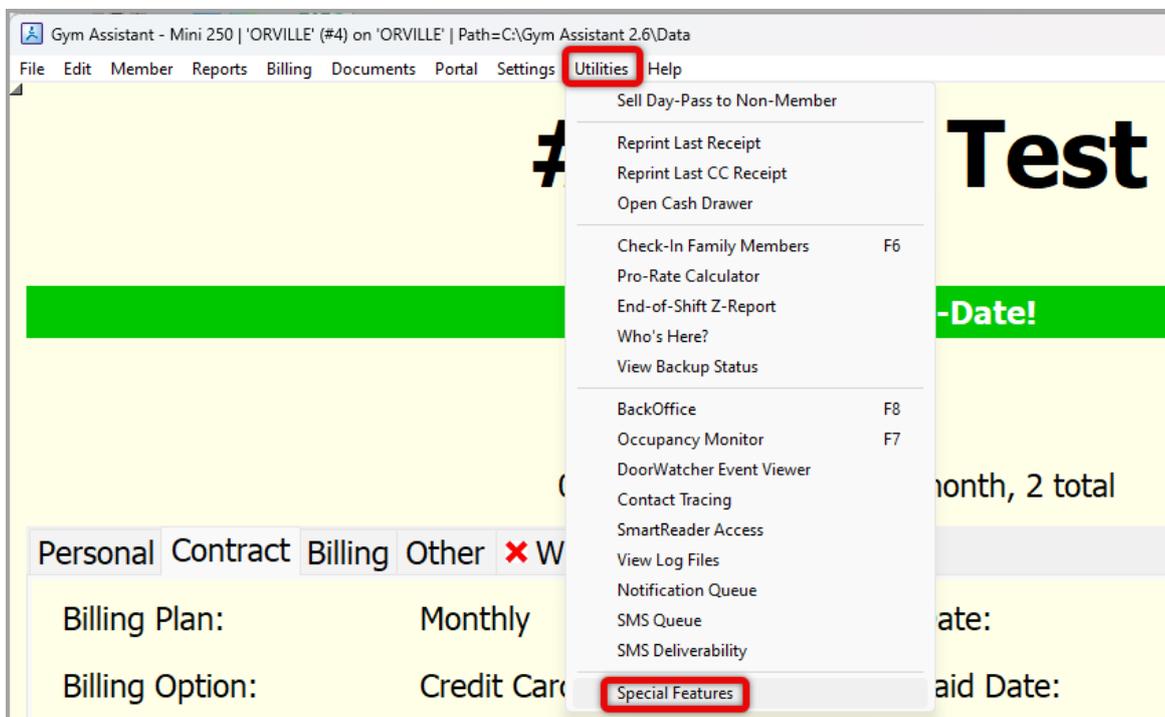
- Type **Apply Credits to Members** into the **Lookup** bar > click on it highlighting it in blue > click **OK**.
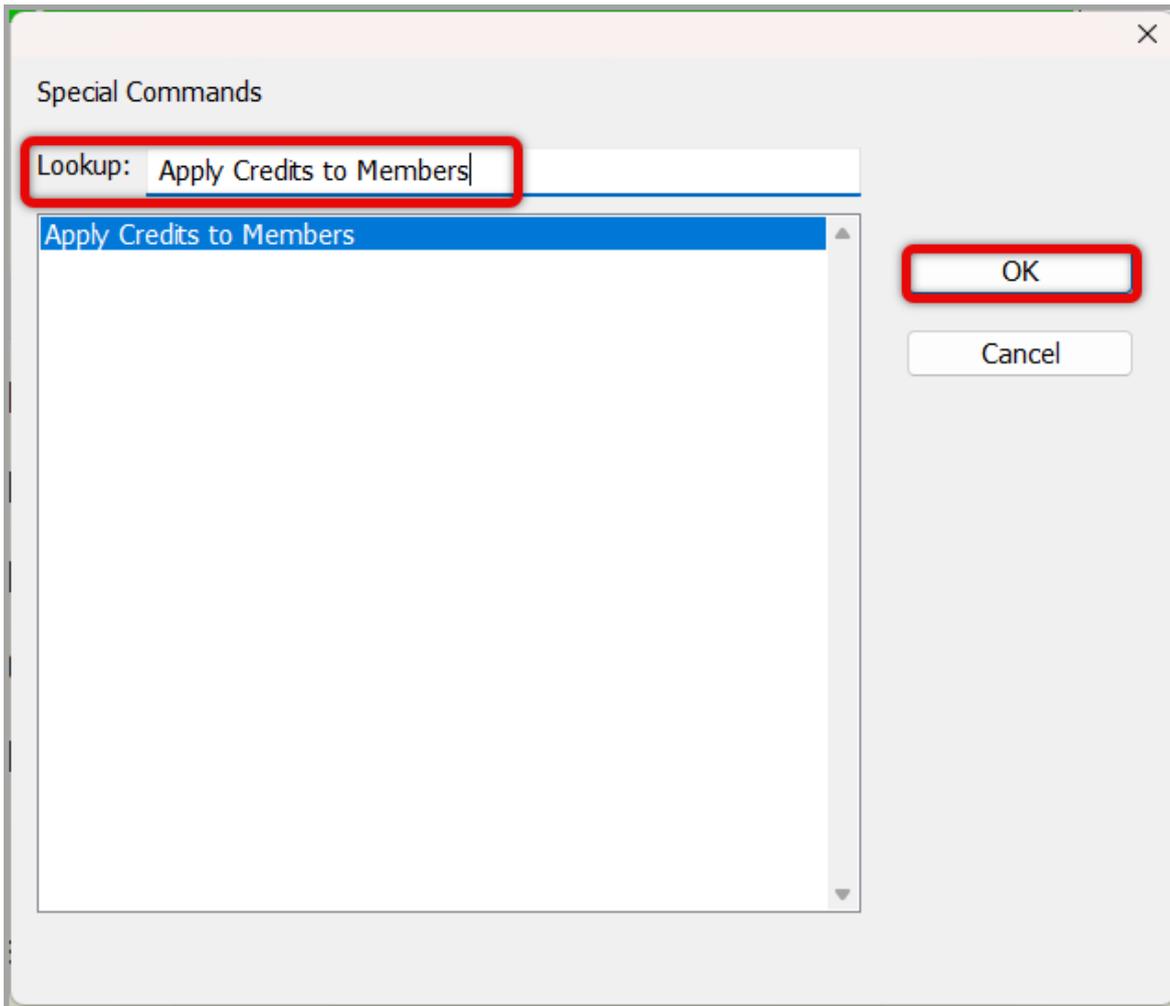
- Click **Yes** to apply Credits for members that you select.

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

- Review the list to confirm the list is accurate > click **Continue**.
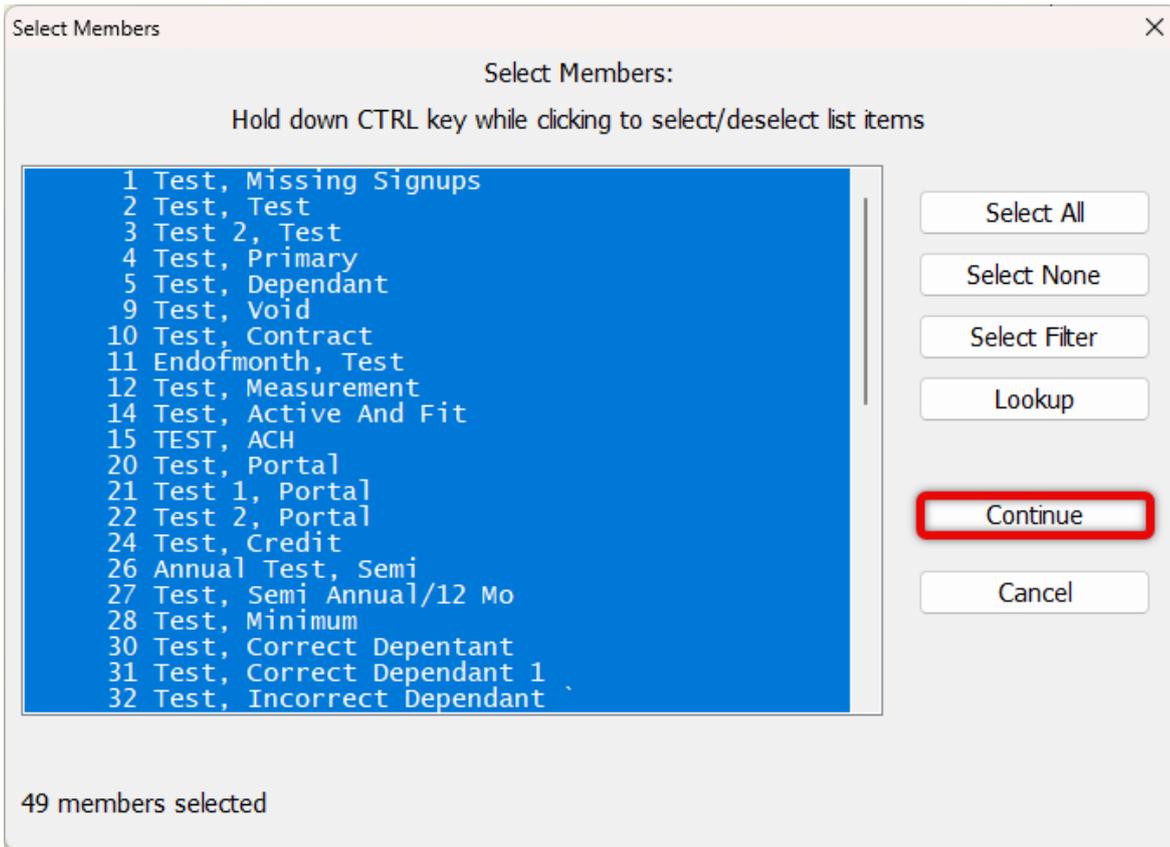
List for Credits   [Suzette's Gym 09/05/2024]

Member Number	Member Name	Membership Type	Billing Status	Billing Option	Billing Amount		Due Date
1	Test, Missing Signups	Monthly	ACTIVE	Credit Card	10.00		* 08/01/2024
2	Test, Test	Monthly	ACTIVE	Credit Card	10.00		10/01/2024
3	Test 2, Test	Monthly	ACTIVE	Credit Card	10.00		* 05/05/2024
4	Test, Primary	Primary	ACTIVE	Credit Card	30.00		* 08/01/2024
5	Test, Dependant	Monthly	ACTIVE	Monthly	10.00	d	* 05/01/2024
9	Test, Void	Monthly	ACTIVE	Monthly	10.00		* 04/01/2023
10	Test, Contract	Primary	ACTIVE	Credit Card	30.00		* 04/01/2023
11	Endofmonth, Test	Monthly	ACTIVE	Credit Card	10.00		* 07/01/2023
12	Test, Measurement	Primary	ACTIVE	Credit Card	30.00		* 05/01/2023
14	Test, Active And Fit	Monthly	ACTIVE	Monthly	10.00		* 05/26/2023
15	TEST, ACH	Primary	ACTIVE	ACH	30.00		* 05/01/2023
20	Test, Portal	2 Contract test	ACTIVE	Credit Card	10.00		* 08/01/2023
21	Test 1, Portal	Primary	ACTIVE	Credit Card	30.00		* 09/01/2023
22	Test 2, Portal	2 Contract test	ACTIVE	Credit Card	10.00		* 08/01/2023
24	Test, Credit	Monthly	ACTIVE	Monthly	10.00		* 08/20/2023
26	Annual Test, Semi	Semi annual	ACTIVE	Semi-Annual	99.00	v	* 02/04/2024
27	Test, Semi Annual/12 Mo	Semi Annual/12 mo te	ACTIVE	Semi-Annual	100.00		* 02/04/2024
28	Test, Minimum	Primary	ACTIVE	Credit Card	30.00		* 09/01/2023
30	Test, Correct Depentant	Primary	ACTIVE	ACH	30.00		* 09/15/2023
31	Test, Correct Dependant	Dependant	ACTIVE	Monthly	10.00	d	* 10/15/2023
32	Test, Incorrect Dependan	Primary	ACTIVE	Monthly	30.00		* 10/30/2023
33	Test, Incorrect Dependan	Dependant	ACTIVE	Monthly	10.00	d	* 10/30/2023
34	Cerko, Test Primary	Monthly	ACTIVE	Credit Card	10.00		* 11/15/2023
35	Cerko, Test Dependant	Monthly	ACTIVE	Monthly	10.00	d	* 11/15/2023
36	Test, Portal	Monthly	ACTIVE	Credit Card	10.00		* 04/15/2024
38	Test , Portal	Monthly	ACTIVE	Credit Card	10.00		* 04/15/2024
39	Billing Test, Suzette	3 Billing plan test	ACTIVE	Credit Card	10.00		* 12/29/2023
40	Billing test 2, Suzette	3 Billing plan test	ACTIVE	Credit Card	10.00		* 01/01/2024
42	Test, Freeze	Monthly	ACTIVE	Monthly	10.00		* 01/04/2024
43	Harlan, Jon	4 Annual Membership	ACTIVE	Annual	120.00		02/26/2025
44	Test, Renew Active	Renew active	ACTIVE	Monthly	0.00		* 04/26/2024
45	Cerko, Dependant	Dependant	ACTIVE	Monthly	10.00	d	* 08/01/2024
46	Test, Log	4 Annual Membership	ACTIVE	Credit Card	120.00		* 06/01/2024
47	Fritz, Rich	4 Annual Membership	ACTIVE	Annual	120.00		04/30/2025
48	Test 1, Corp	Corp members	ACTIVE	ACH	0.00		* 08/01/2024
49	Member 2, Corp	Corp members	ACTIVE	ACH	0.00		* 08/01/2024
50	Business, Corp	Corp test account	ACTIVE	ACH	2233.69		* 06/01/2024
51	Welcome letter test, Suz	4 Annual Membership	ACTIVE	Credit Card	120.00		* 06/01/2024
52	Welcome Test 1, Suzette	Monthly	ACTIVE	Credit Card	10.00		* 07/15/2024
53	Test, Tablet	4 Annual Membership	ACTIVE	Credit Card	120.00		* 06/01/2024
54	Test, Cash	Monthly	ACTIVE	Monthly	10.00		* 07/10/2024
55	Test, 1 Day To Pay	Monthly	ACTIVE	Monthly	20.00	a	* 08/02/2024
56	Test, 3 Days To Pay	Monthly	ACTIVE	Monthly	10.00		* 07/06/2024
57	Test, Nancy	Monthly	ACTIVE	Monthly	10.00		* 08/09/2024
58	Test, Silver Sneakers	Silver Sneakers	ACTIVE	Credit Card	0.00		* 08/01/2024
59	Test, Free	Free	ACTIVE	ACH	0.00		* 09/01/2024
60	Test, App	Monthly	ACTIVE	Credit Card	10.00		* 08/07/2024
61	Gym, Jason's	Monthly	ACTIVE	Monthly	10.00		09/23/2024
62	Test, Current Balance	Dependant	ACTIVE	Monthly	10.00	d	10/01/2024

Search Criteria:

    Membership Types: Membership
       Billing Status: Active
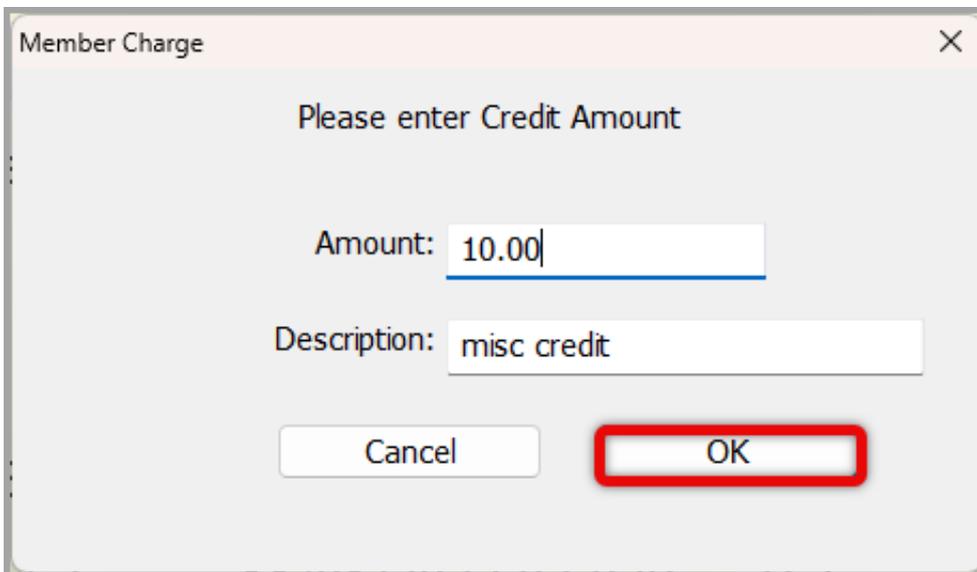   Home Club: ALL

Sorted by: Membership Number

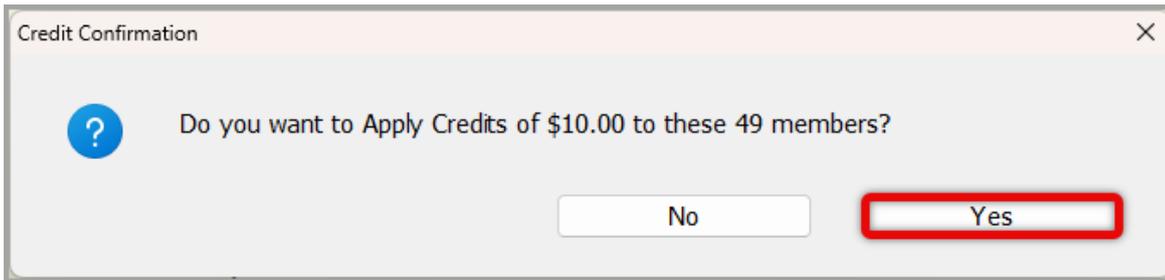Print   Save   Copy   View in Browser   Cancel   Continue   ?

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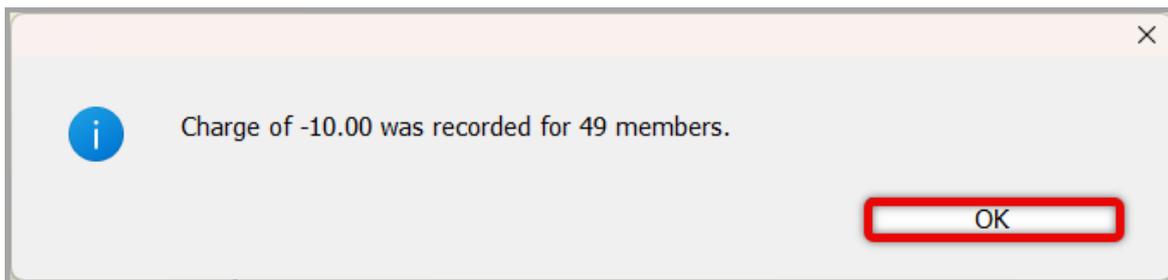
Select Members:

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 Depentant
31 Test, Correct Dependant 1
32 Test, Incorrect Dependant
```

Select All

Select None

Select Filter

Lookup

Continue

Cancel

49 members selected

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

Member Charge

Please enter Credit Amount

Amount: 10.00

Description: misc credit

Cancel   OK

- Click **Yes** to verify that you do want to Apply Credit to these members.

Credit Confirmation ✕

? Do you want to Apply Credits of $10.00 to these 49 members?

No   **Yes**

- Ignore that the next screen that talks about adding a charge to these members, it will be a credit > click **OK**.

✕

ⓘ Charge of -10.00 was recorded for 49 members.

OK

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

✕

Special Commands

Lookup: Apply Credits to Members

Apply Credits to Members

OK

Cancel
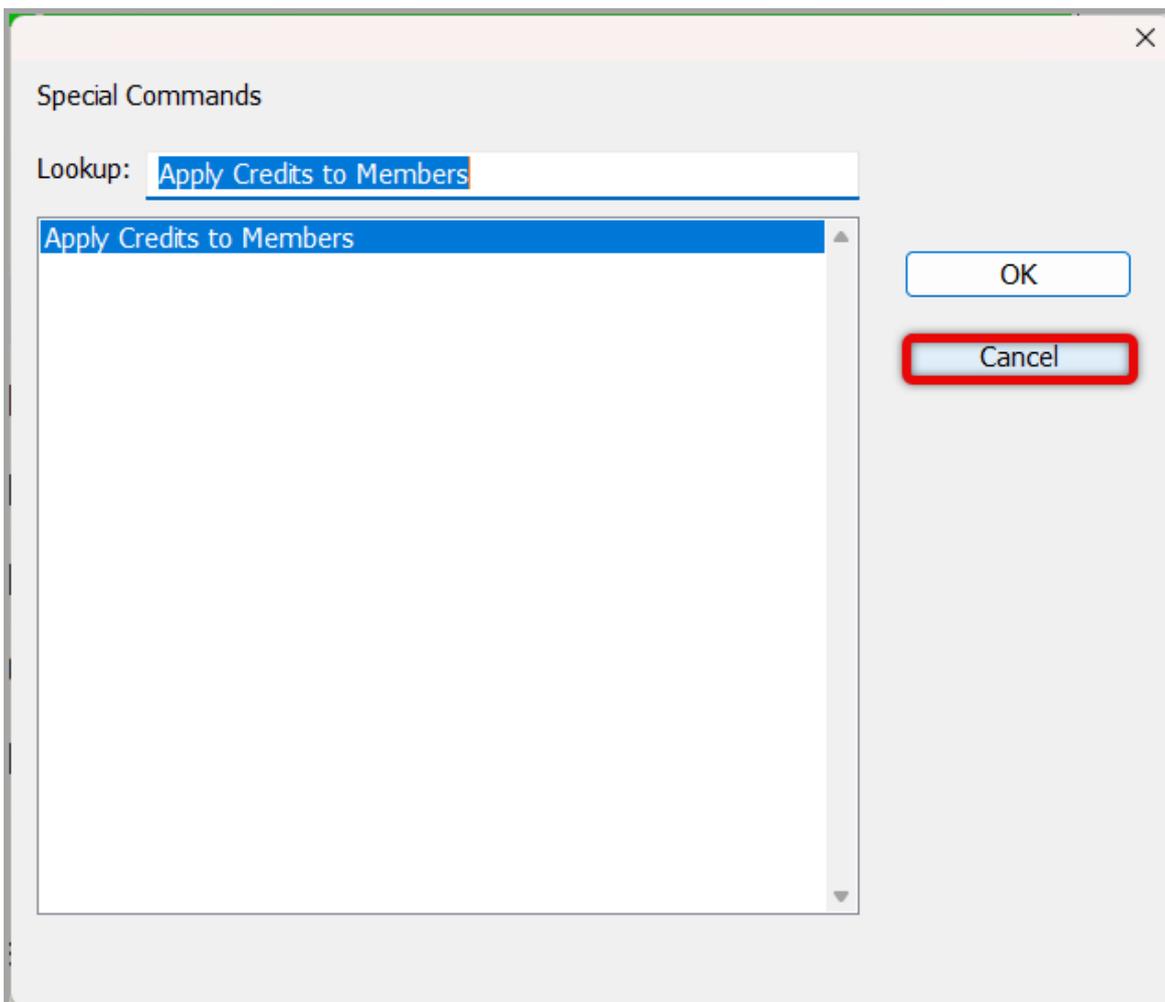
The credit can now be seen on the profile of each member receiving the credit to the right of **Current Balance** and in green.