

How to Add a Credit in Gym Assistant

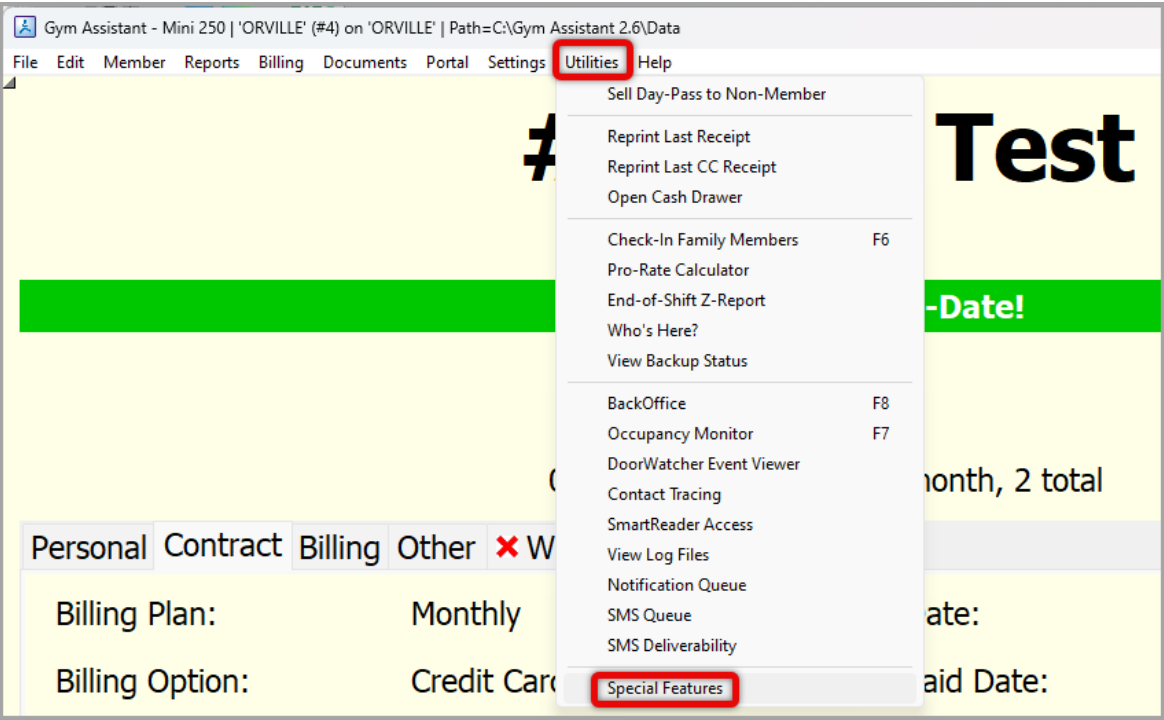
How to Add a Credit in Gym Assistant September 2024

Introduction

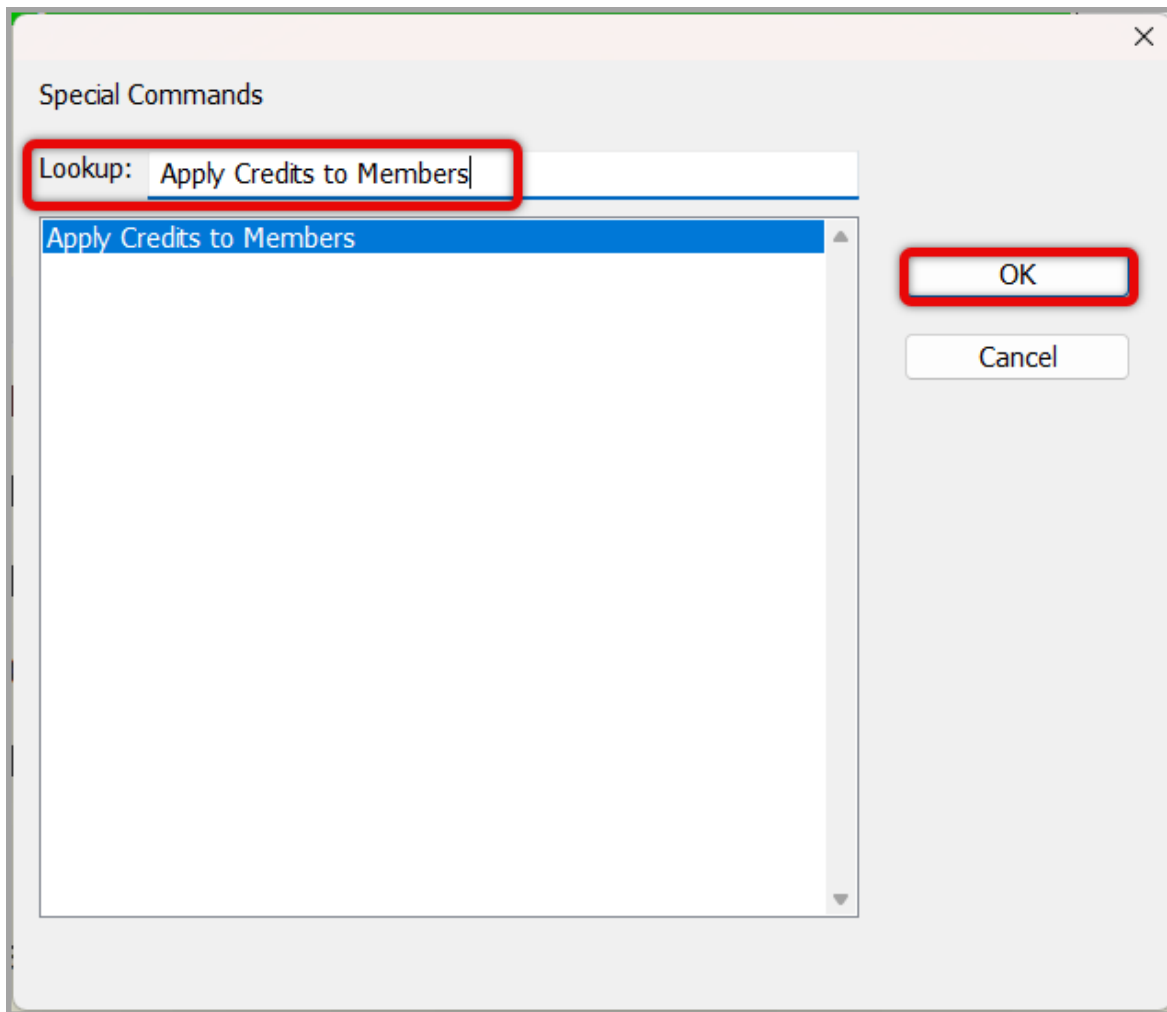
Provides the ability to add a monthly, quarterly, yearly, etc. credit to a member account that will be credited automatically on the next billing date.

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

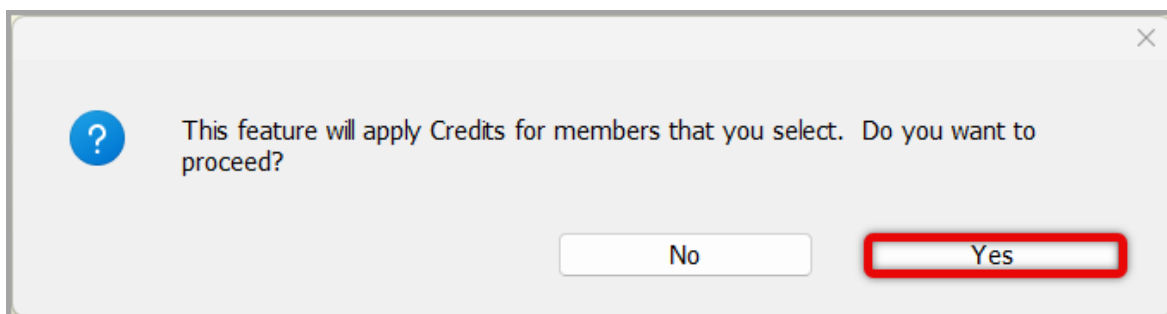
- Begin by going to **Utilities > Special Features**.



- 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**.

Select Members

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:

- 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 Dependant	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

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 Credit Amount

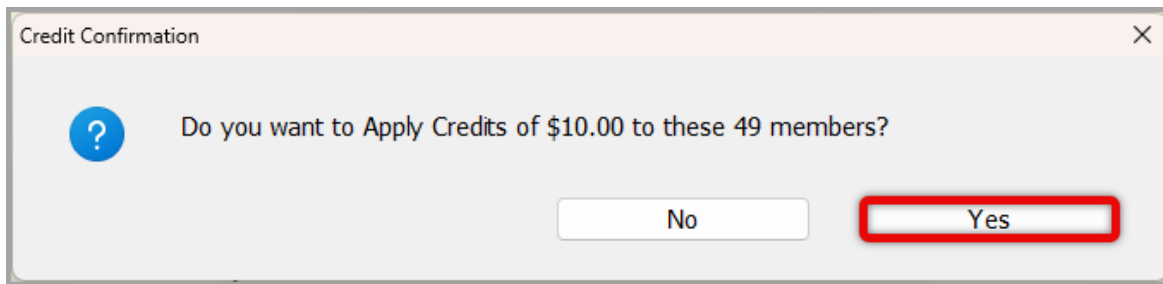
Amount: 10.00

Description: misc credit

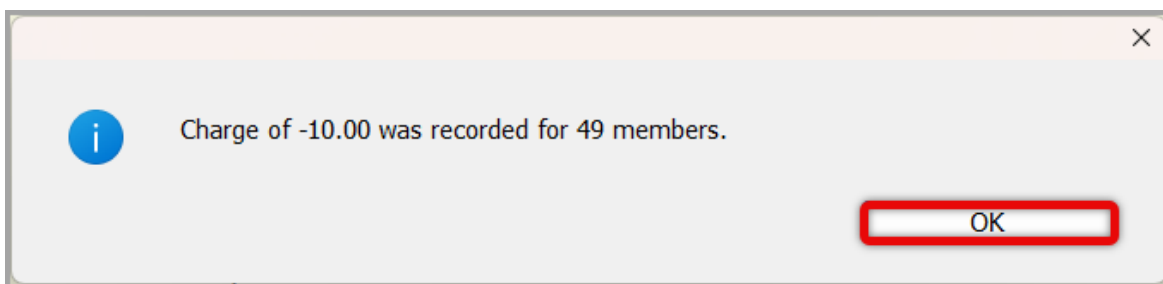
Cancel

OK

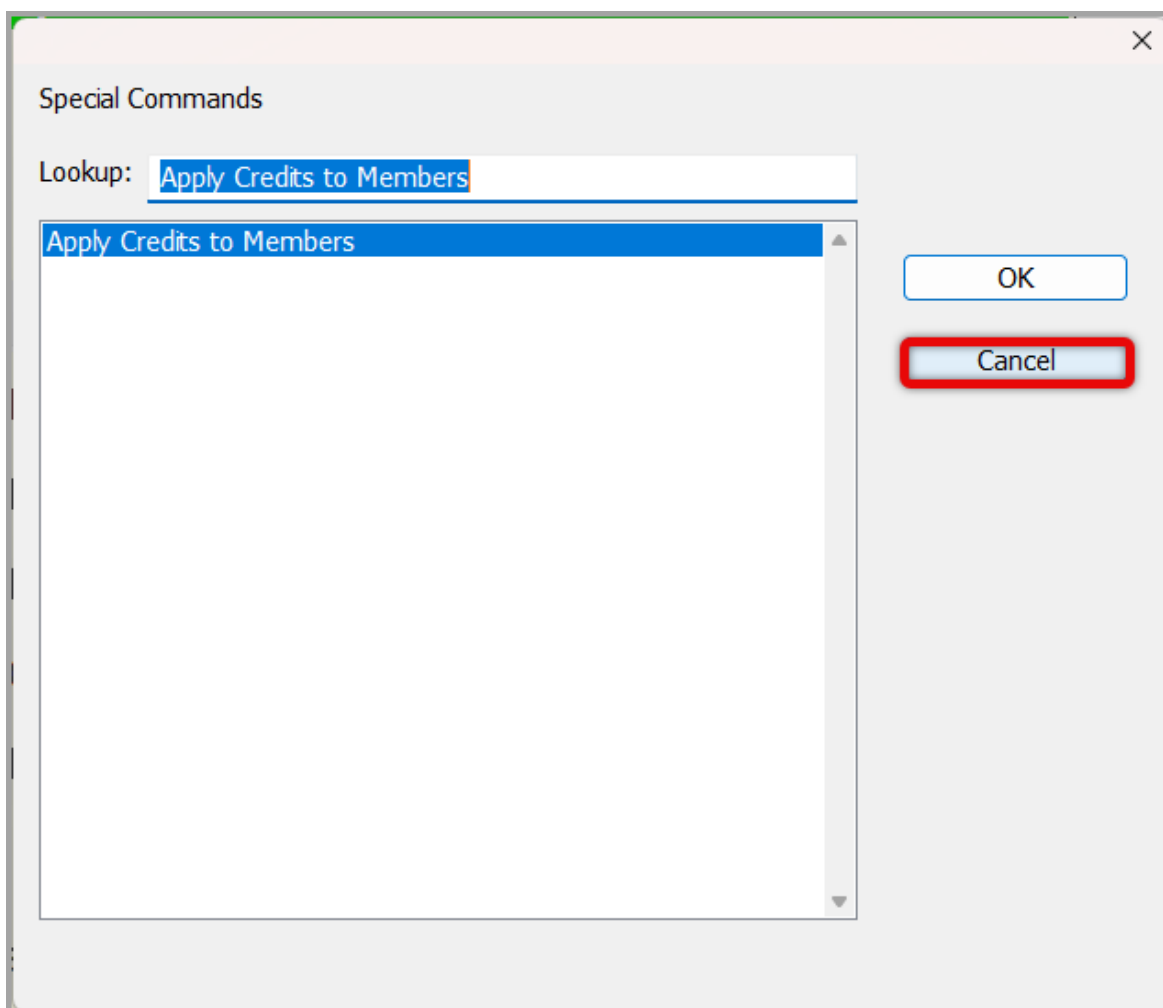
- Click **Yes** to verify that you do want to Apply Credit to these members.



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



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

FileEditMemberReportsBillingDocumentsPortalSettingsUtilitiesHelp

#2 Test Test

Membership Up-to-Date!

0 visits this month, 0 last month, 2 total

PersonalContractBillingOtherWaivers

Billing Plan:MonthlyDue Date:10/01/2024Signup Date:10/03/2022

Billing Option:Credit CardLast Paid Date:09/04/2024Contract Begin:08/23/2024

Billing Amount:10.00Last Paid Amount:-10.00Contract End:08/23/2025

Billing Status:ACTIVECurrent Balance:10.00 (CR)Freeze Date:--/--/--

Terminate Billing:NeverLast Check-In:11/01/2023 02:03PUnfreeze Date:--/--/--

Membership Add-Ons:- none -

Linked Memberships:1 Dependents: Current Balance Test (#62)

Enter Member # or Name:

ViewClear<< PrevNext >>

☐ Basic Display☒ Display GateKeeper Check-ins☐ Display Alerts

Click here to add photo

Add New Member

Record a Payment

Edit Member Record

AlertComment

PictureBarcode

NotesDocs

Attachments

Punchcard Add-Ons

Journal History

Visits History

Record Check-In

Sell Retail to Member

Monitor Check-Ins

Open Door

Portal CC processing is in TEST MODE?

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