

How to Add a Credit in Gym Assistant

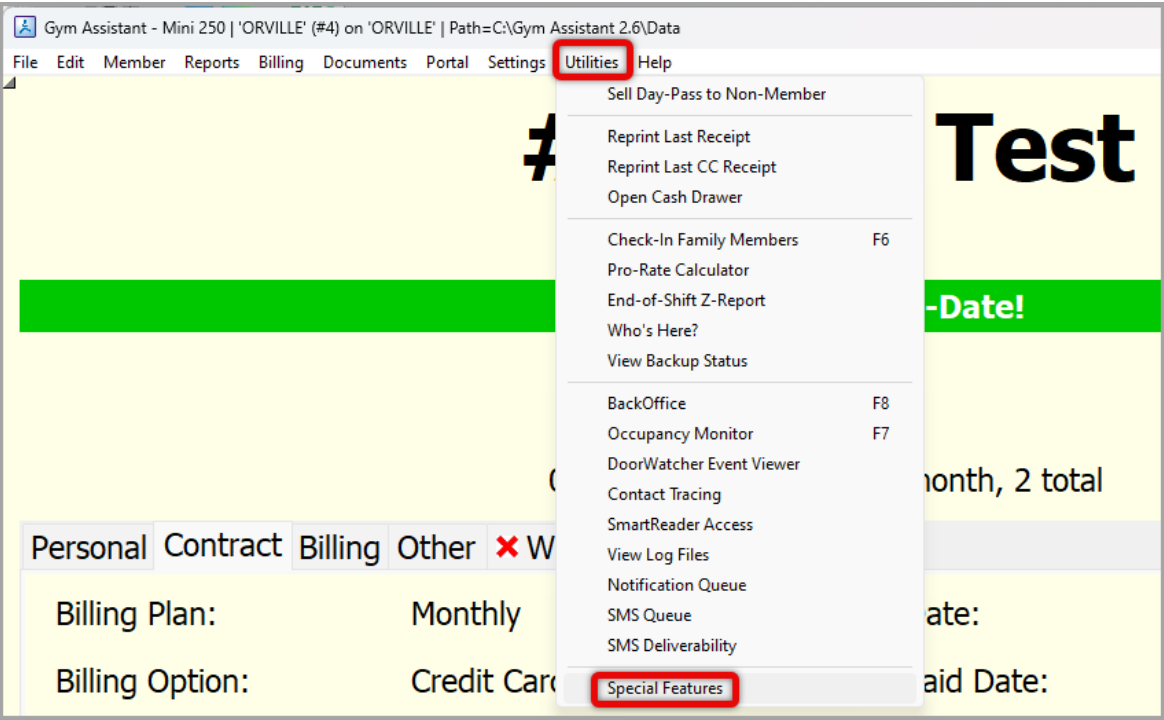
How to Add a Credit in Gym Assistant September 2024

Introduction

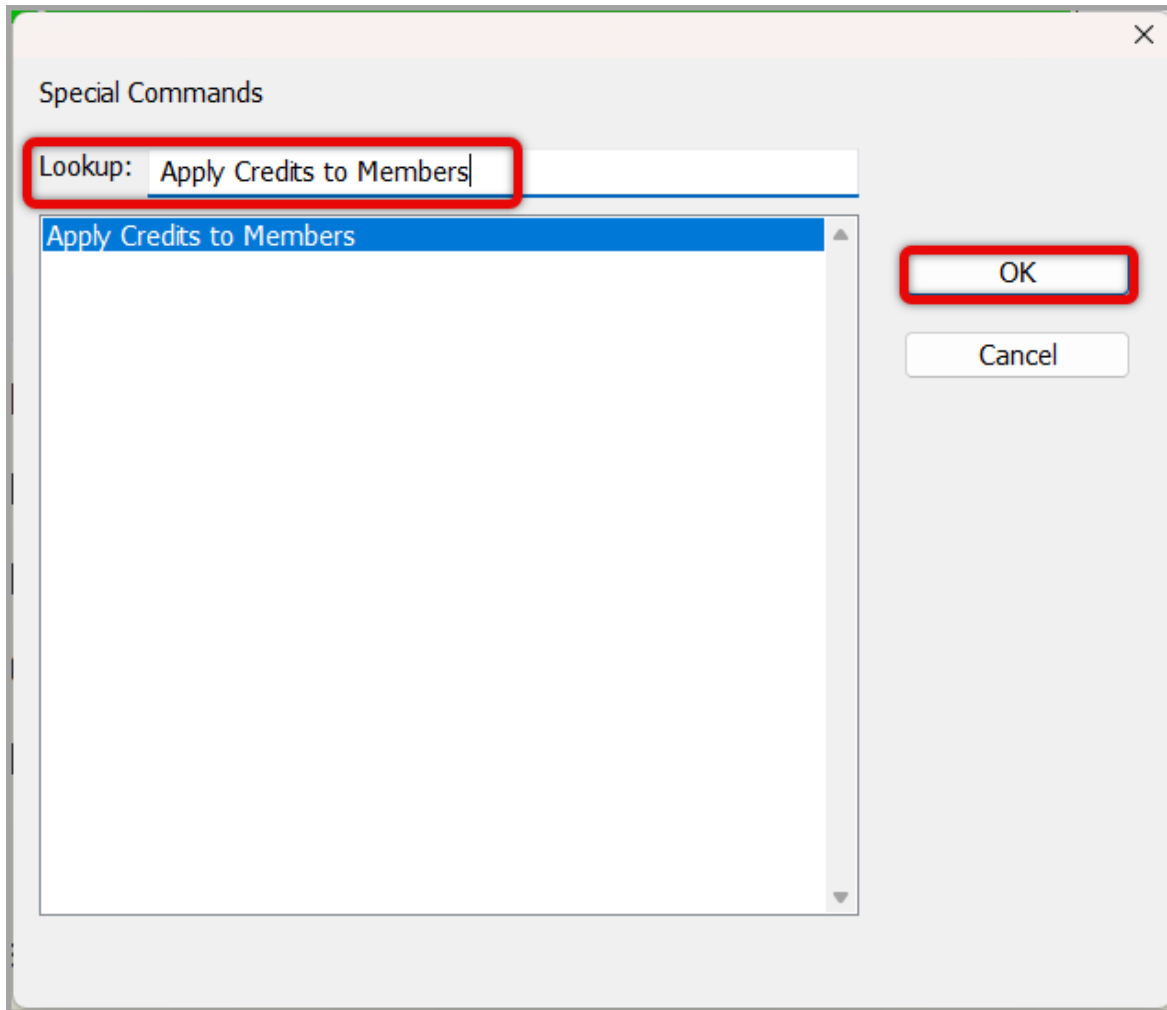
Provides the ability to add a monthly, quarterly, yearly, etc. credit to a member account that will be credited automatically on the next billing date.

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

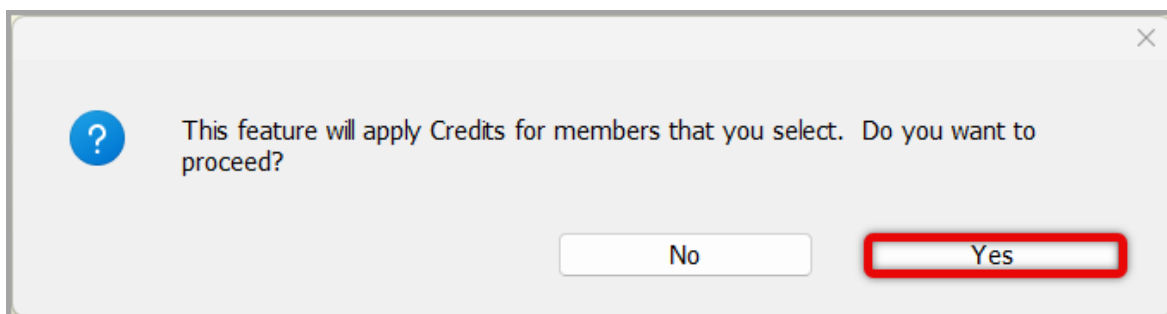
- Begin by going to **Utilities > Special Features**.



- 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

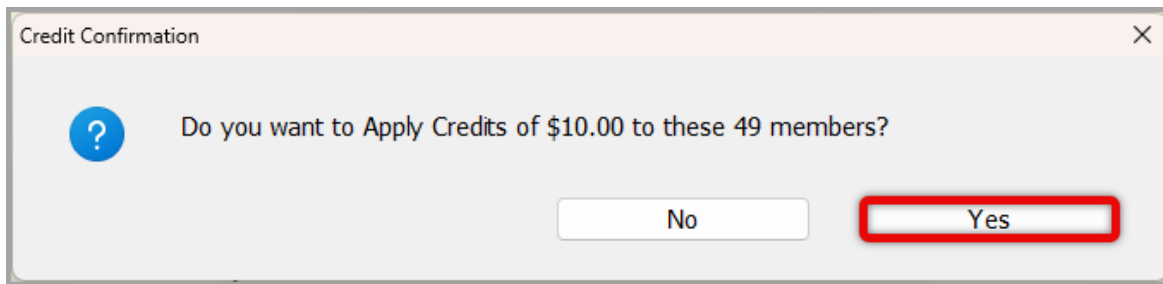
Please enter Credit Amount

Amount: 10.00

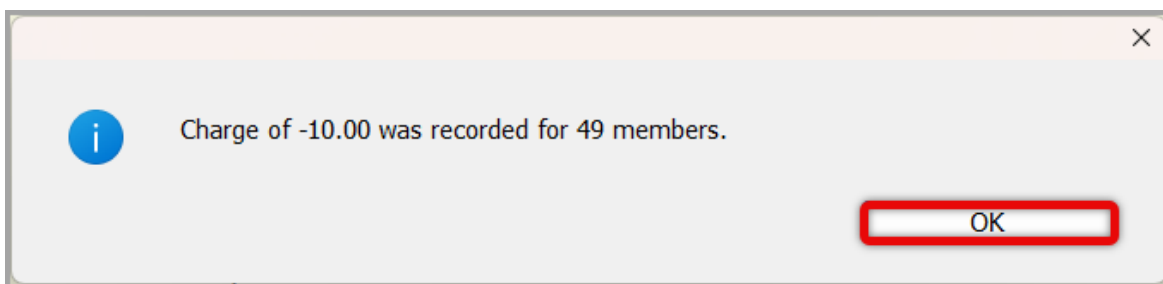
Description: misc credit

Cancel OK

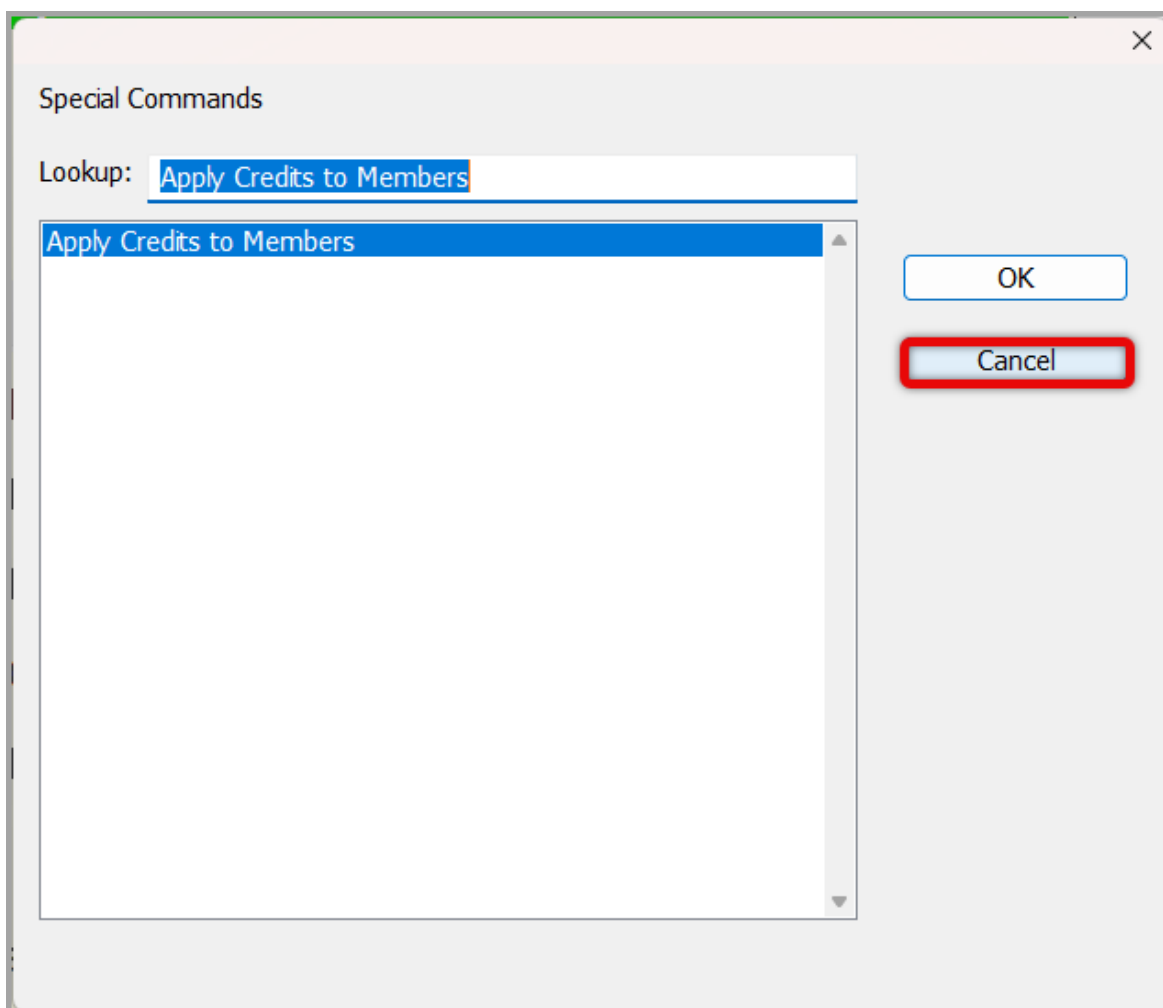
- Click **Yes** to verify that you do want to Apply Credit to these members.



- 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>