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.
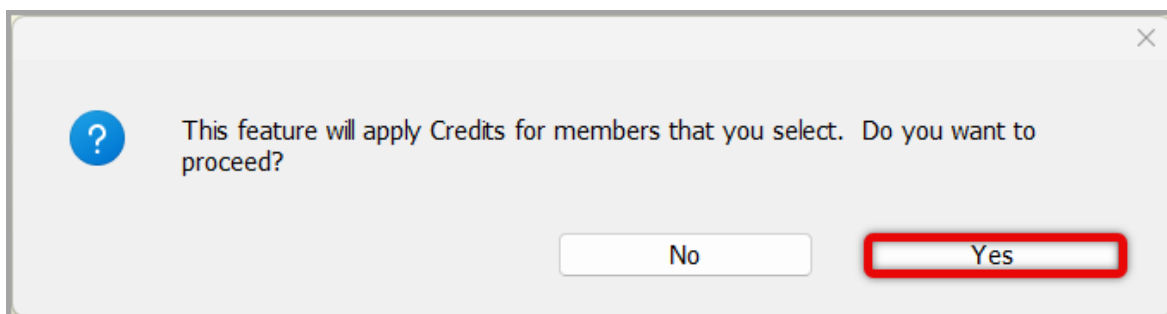
- Begin by going to **Utilities > Special Features**.
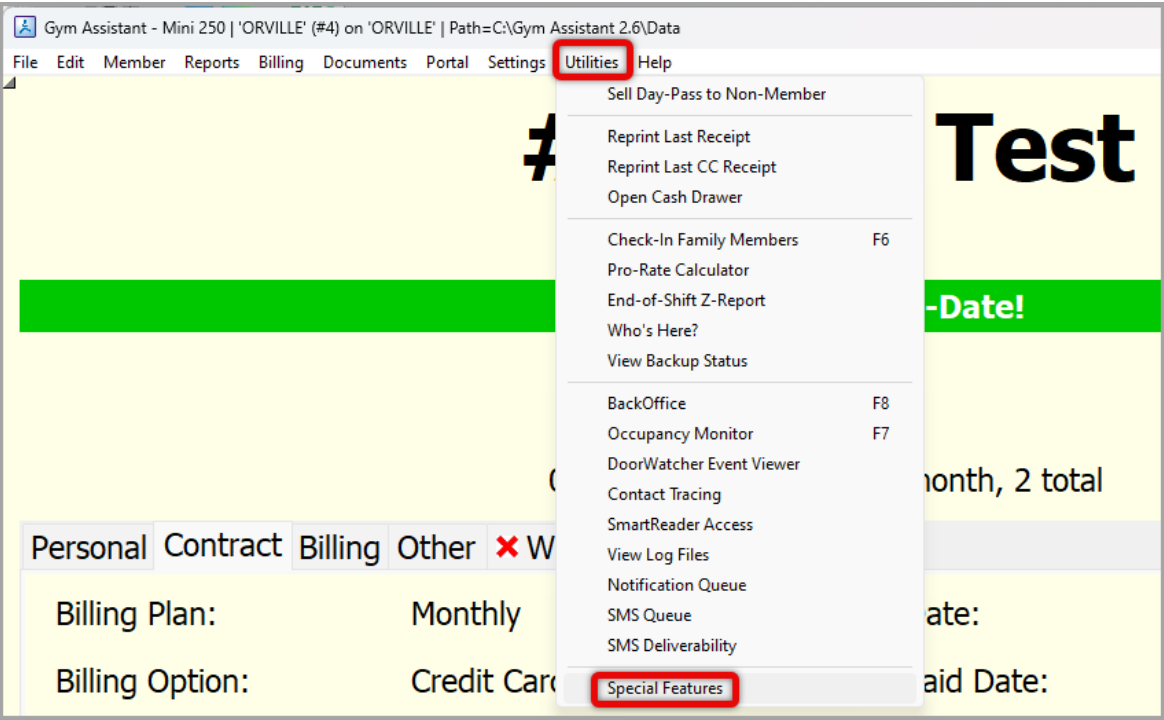
- Type **Apply Credits to Members** into the **Lookup** bar > click on it highlighting it in blue > click **OK**.
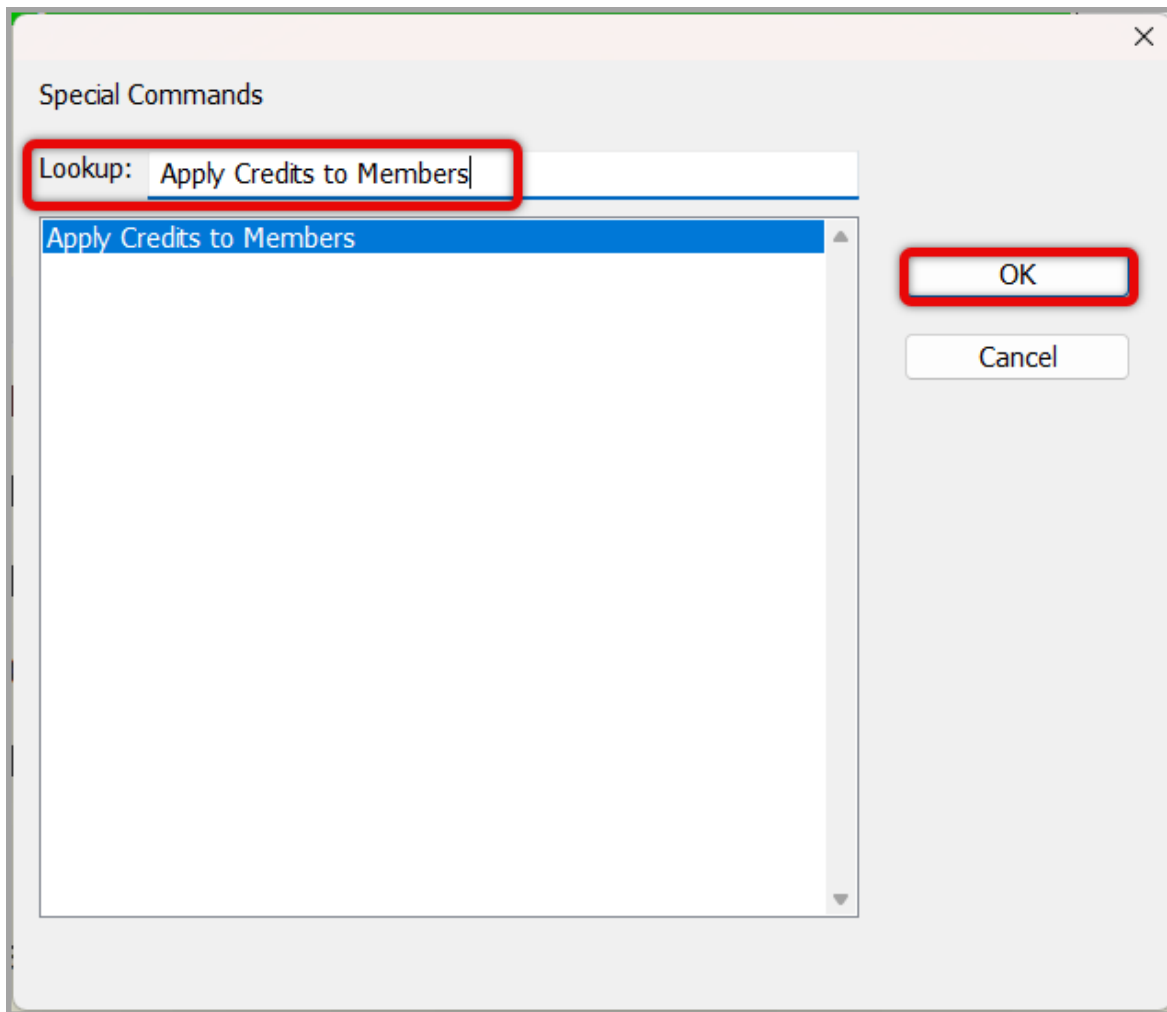
- Click **Yes** to apply Credits for members that you select.

- **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  Member                   Membership            Billing    Billing        Billing    Due
Number  Name                     Type                  Status     Option         Amount     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**.

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

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

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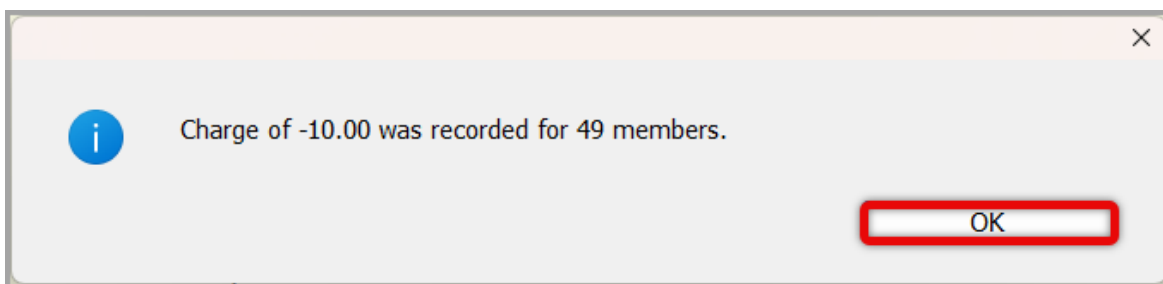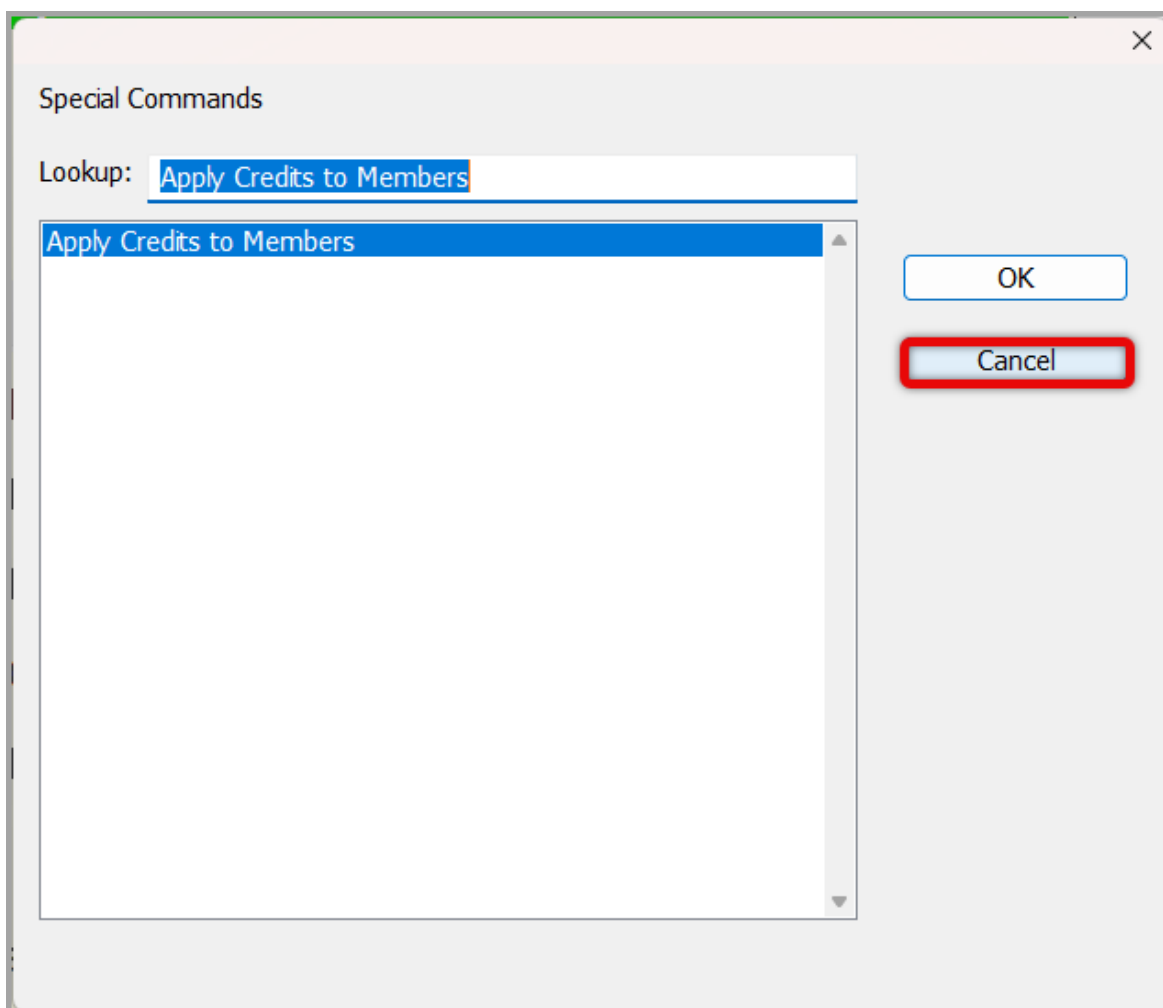
?   Do you want to Apply Credits of $10.00 to these 49 members?

                 No   **Yes**
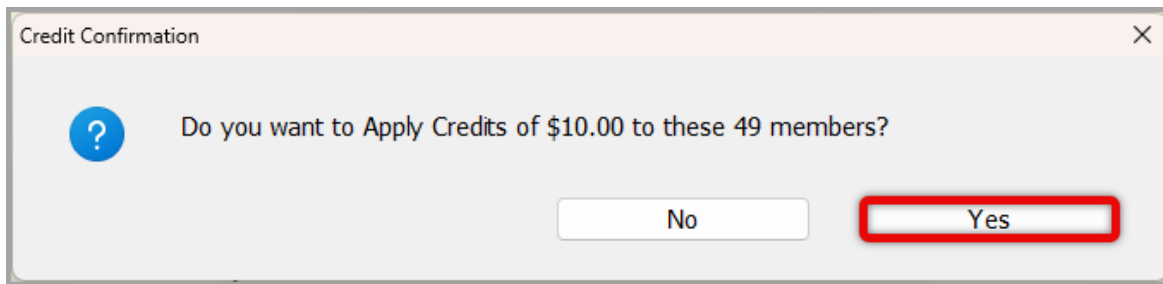
- Ignore that the next screen that talks about adding a charge to these members, it will be a credit > click **OK**.

                                                                  ✕

ⓘ   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.