

How to Add a Credit in Gym Assistant

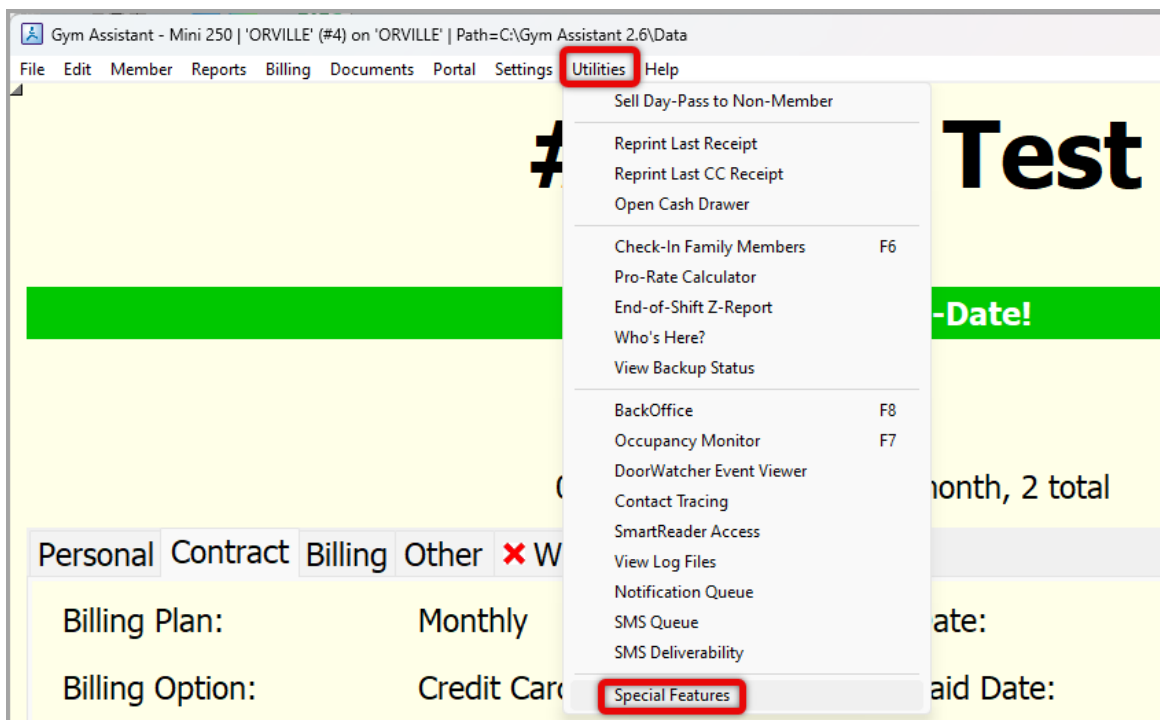
How to Add a Credit in Gym Assistant September 2024

Introduction

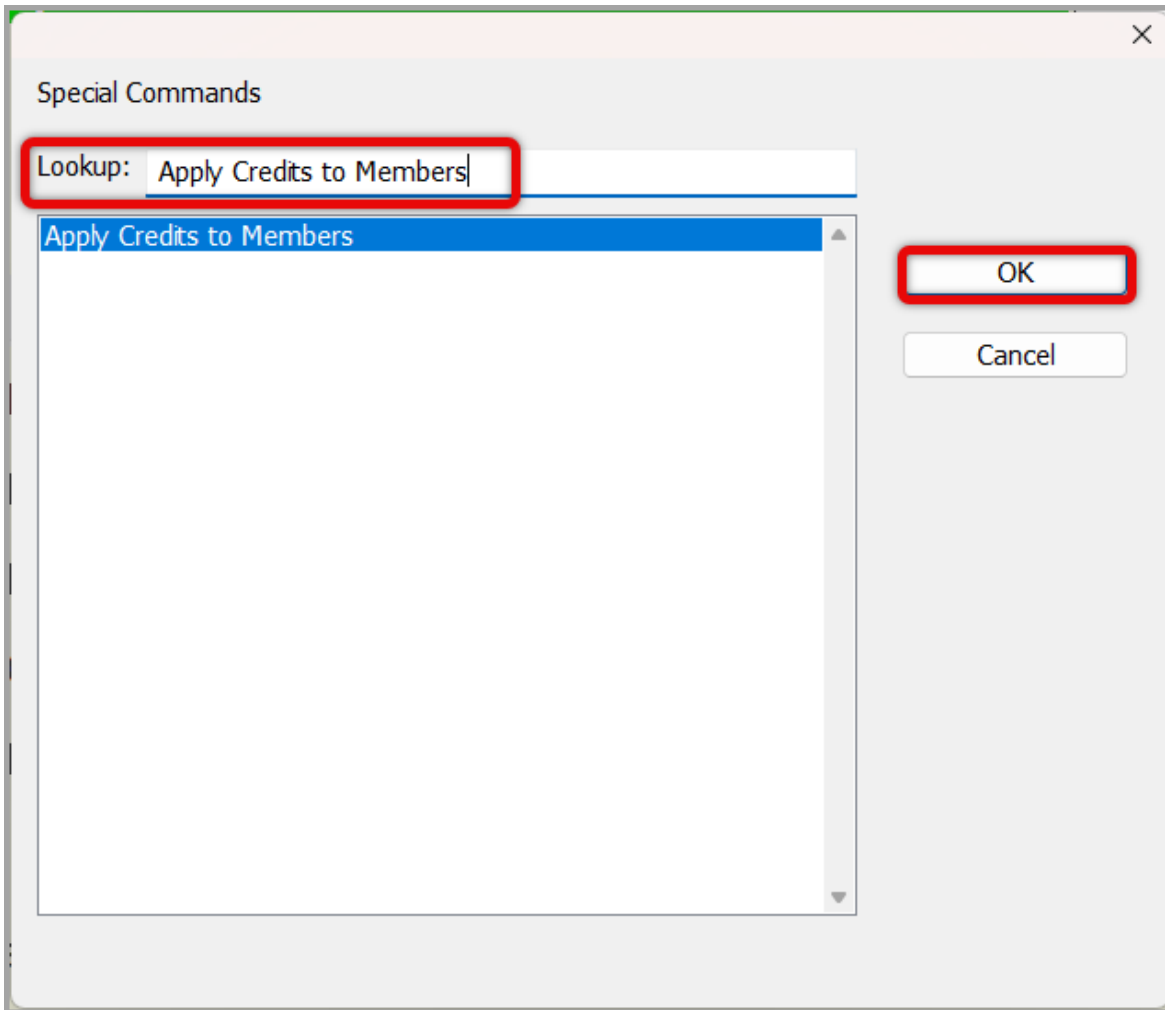
Provides the ability to add a monthly, quarterly, yearly, etc. credit to a member account that will be credited automatically on the next billing date.

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

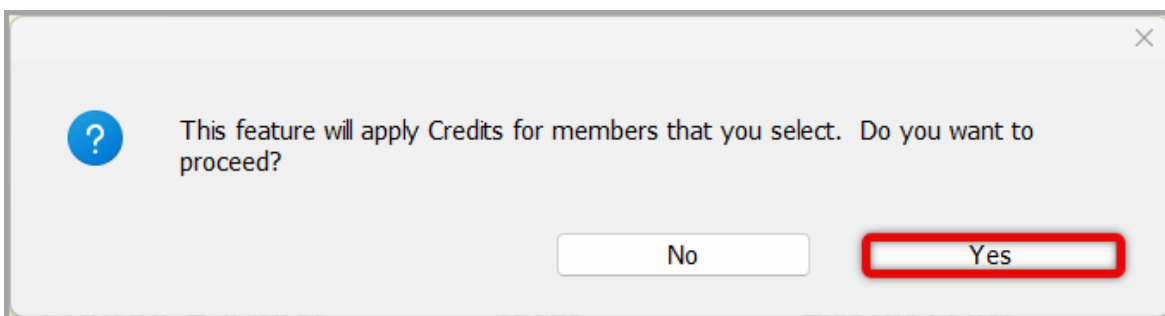
- Begin by going to **Utilities > Special Features**.



- 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]

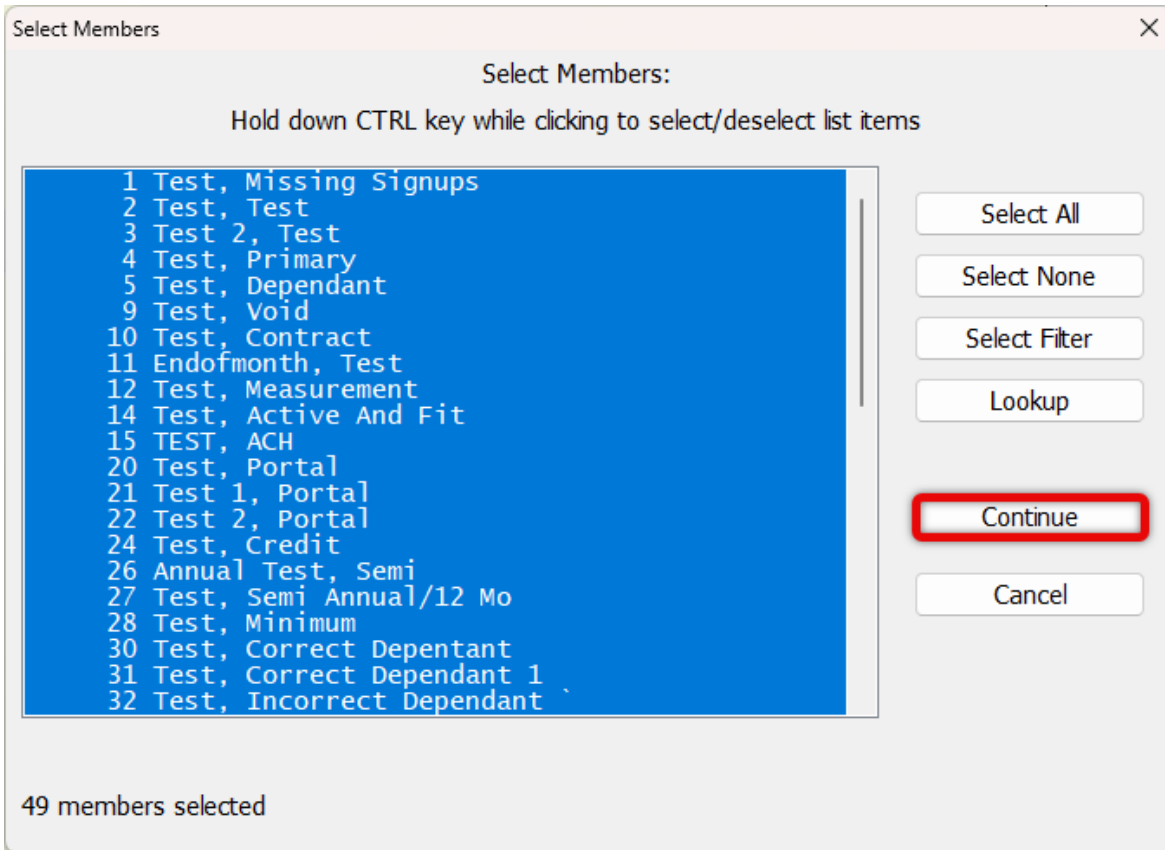
Member Number	Member Name	Membership Type	Billing Status	Billing Option	Billing Amount	Due Date
1	Test, Missing Signups	Monthly	ACTIVE	Credit Card	10.00	* 08/01/2024
2	Test, Test	Monthly	ACTIVE	Credit Card	10.00	10/01/2024
3	Test 2, Test	Monthly	ACTIVE	Credit Card	10.00	* 05/05/2024
4	Test, Primary	Primary	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

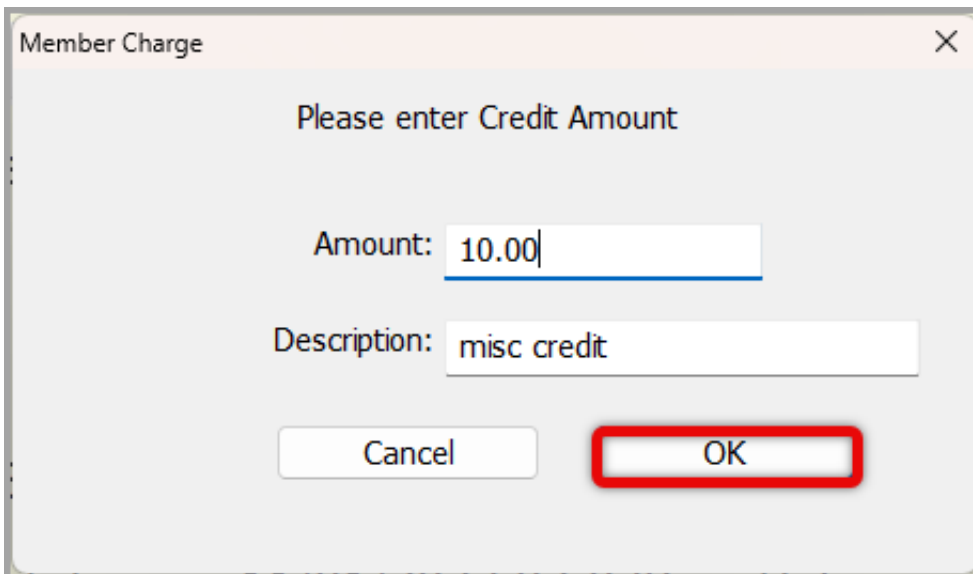
Sorted by: Membership Number

Print Save Copy View in Browser Cancel **Continue** ?

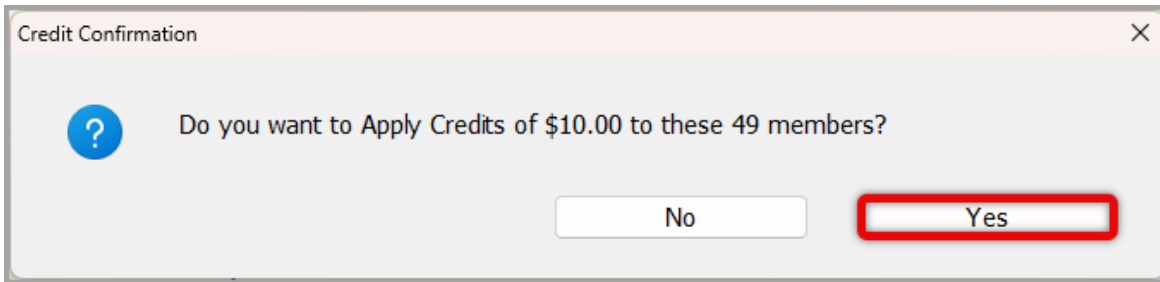
- Choose options to again verify the member list and remove members included in the list if necessary > click **Continue**.



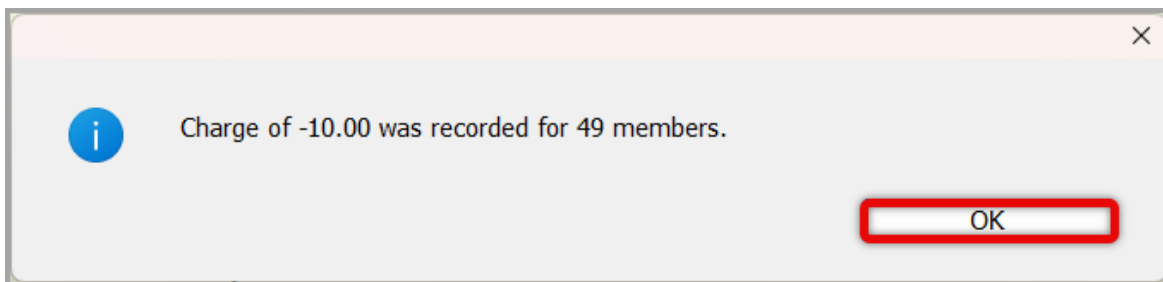
- Enter the **Amount** and **Description** > click **OK**.



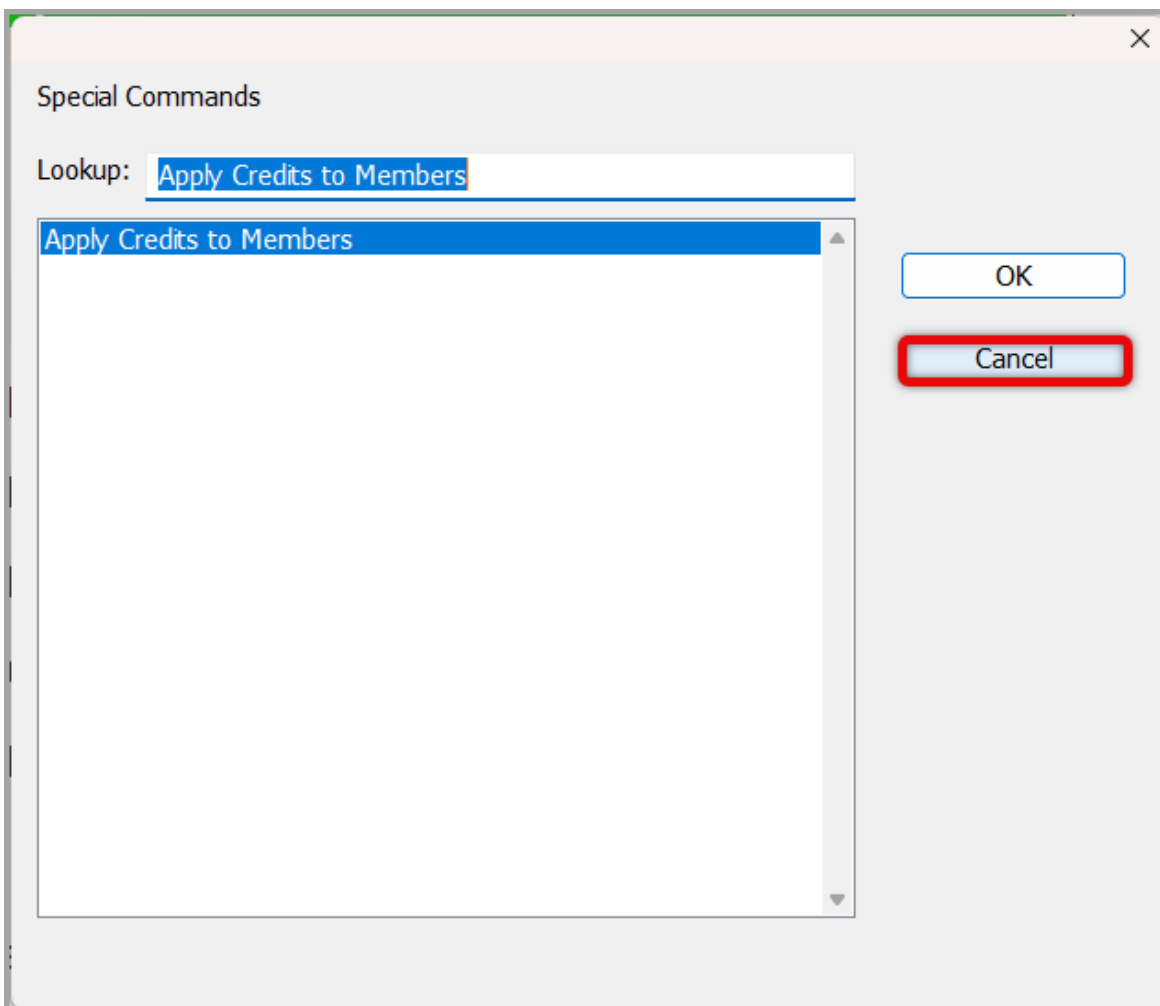
- Click **Yes** to verify that you do want to Apply Credit to these members.



- 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.

#2 Test Test

Membership Up-to-Date!

0 visits this month, 0 last month, 2 total

Personal Contract Billing Other **Waivers**

Billing Plan:	Monthly	Due Date:	10/01/2024	Signup Date:	10/03/2022
Billing Option:	Credit Card	Last Paid Date:	09/04/2024	Contract Begin:	08/23/2024
Billing Amount:	10.00	Last Paid Amount:	-10.00	Contract End:	08/23/2025
Billing Status:	ACTIVE	Current Balance:	10.00 (CR)	Freeze Date:	--/--
Terminate Billing:	Never	Last Check-In:	11/01/2023 02:03P	UnFreeze Date:	--/--

Membership Add-Ons: - none -
Linked Memberships: 1 Dependents: Current Balance Test (#62)

Enter Member # or Name:

Basic Display Display GateKeeper Check-ins Display Alerts

Partial CC processing in TEST MODE ?

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