

How to Add a Credit in Gym Assistant

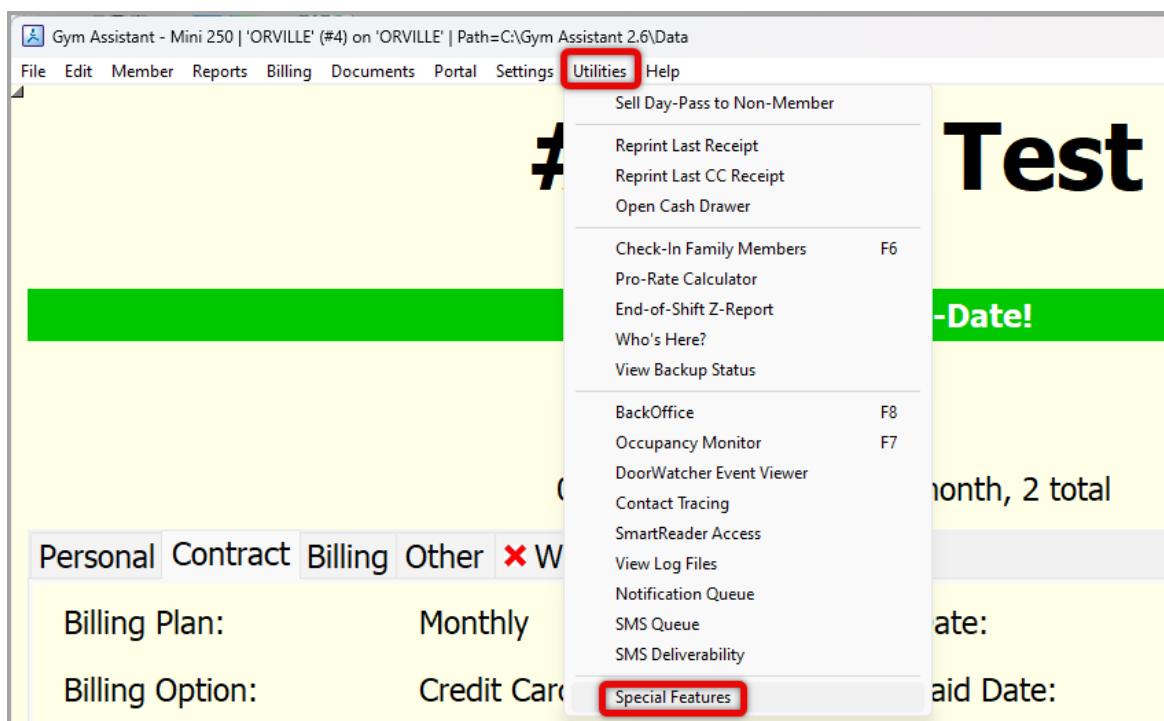
How to Add a Credit in Gym Assistant September 2024

Introduction

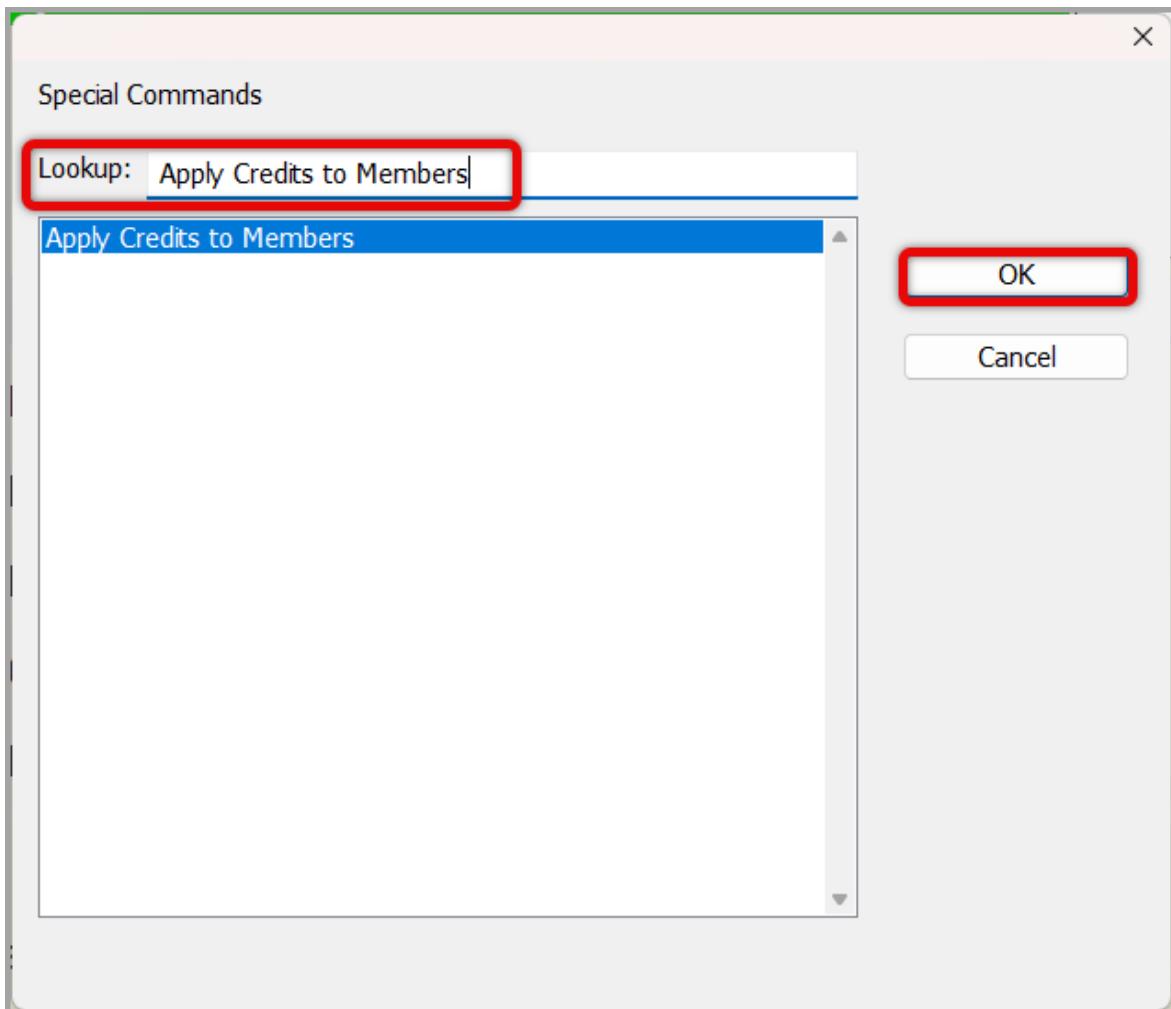
Provides the ability to add a monthly, quarterly, yearly, etc. credit to a member account that will be credited automatically on the next billing date.

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

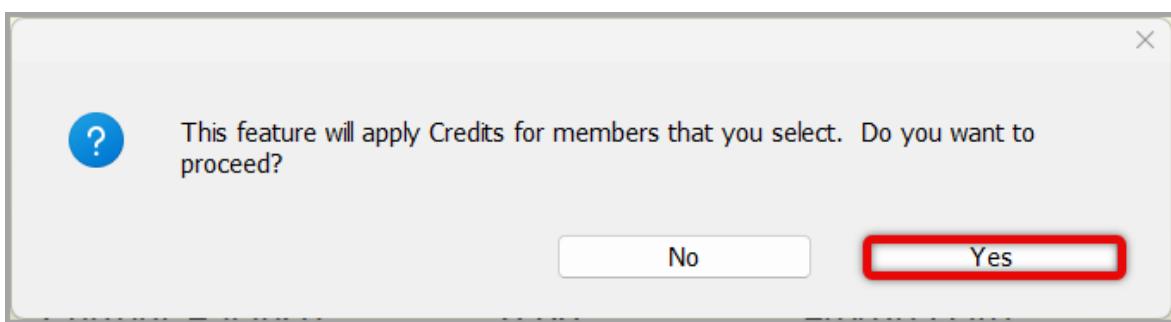
- Begin by going to **Utilities > Special Features**.



- 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:

Plan Types: Membership Plans

Billing Status: Active

Billing Options: All

Due Date: All

Contract Begin: All

Contract End: All

Signup Date: All

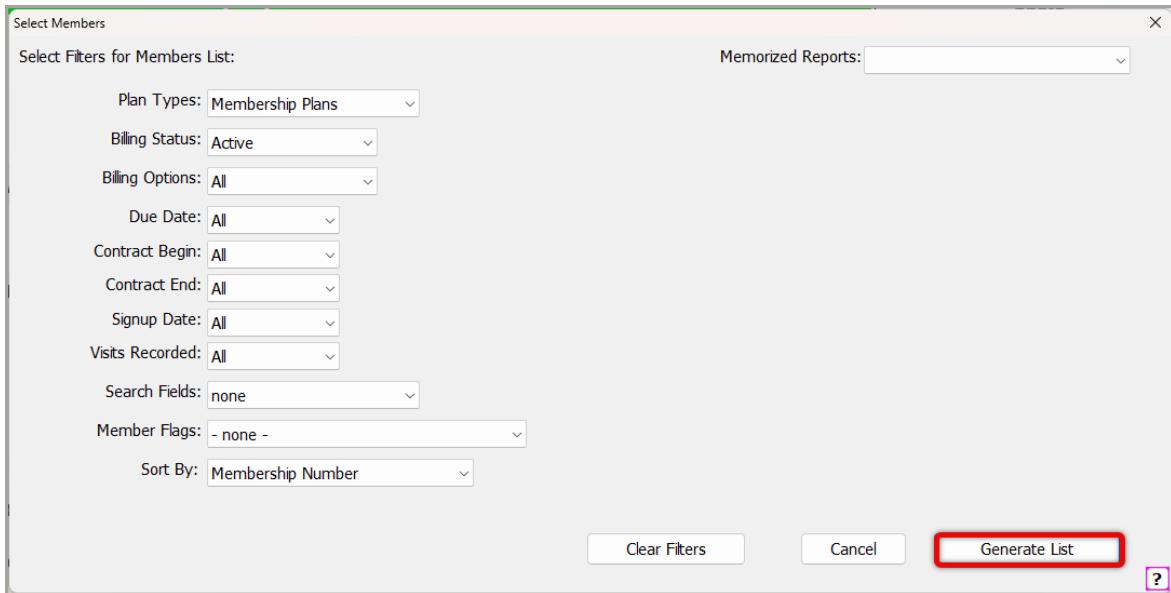
Visits Recorded: All

Search Fields: none

Member Flags: - none -

Sort By: Membership Number

Memorized Reports:



- 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 Dependant	Primary	ACTIVE	Monthly	30.00	* 10/30/2023
33	Test, Incorrect Dependant	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

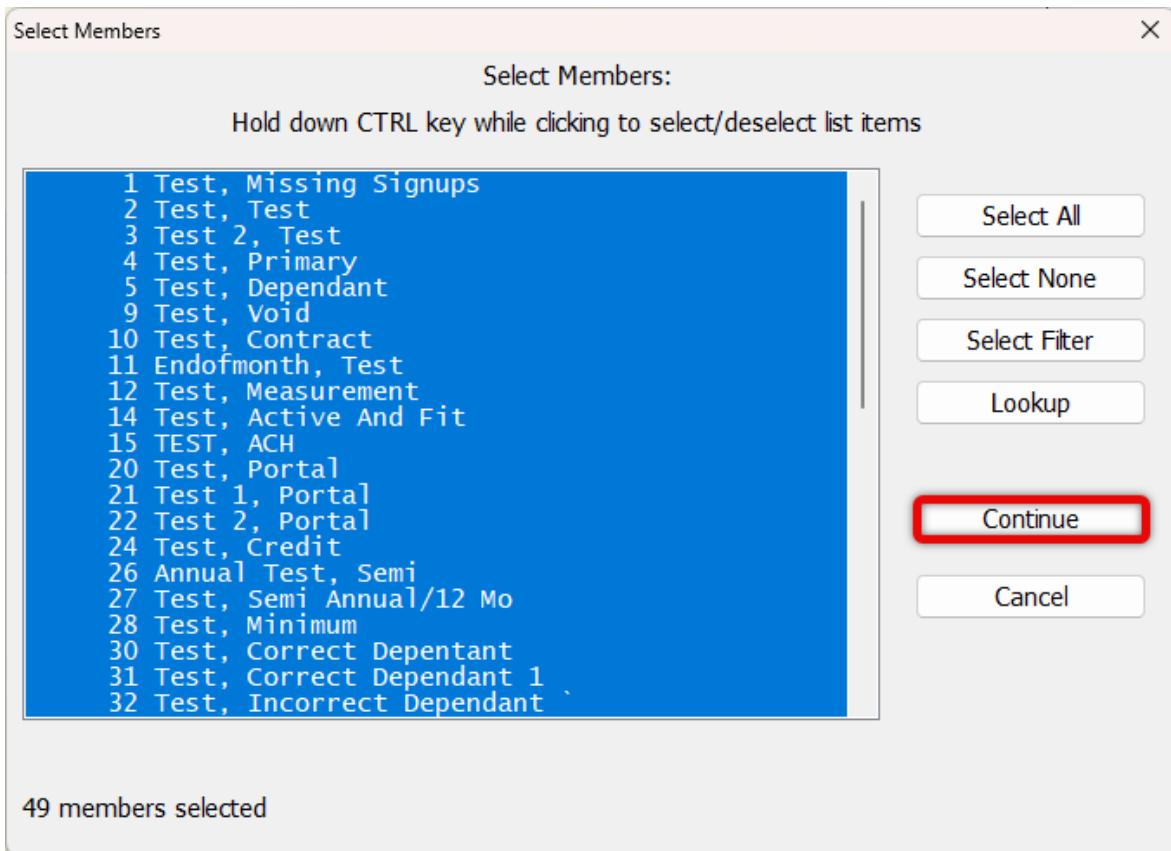
Search Criteria:

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

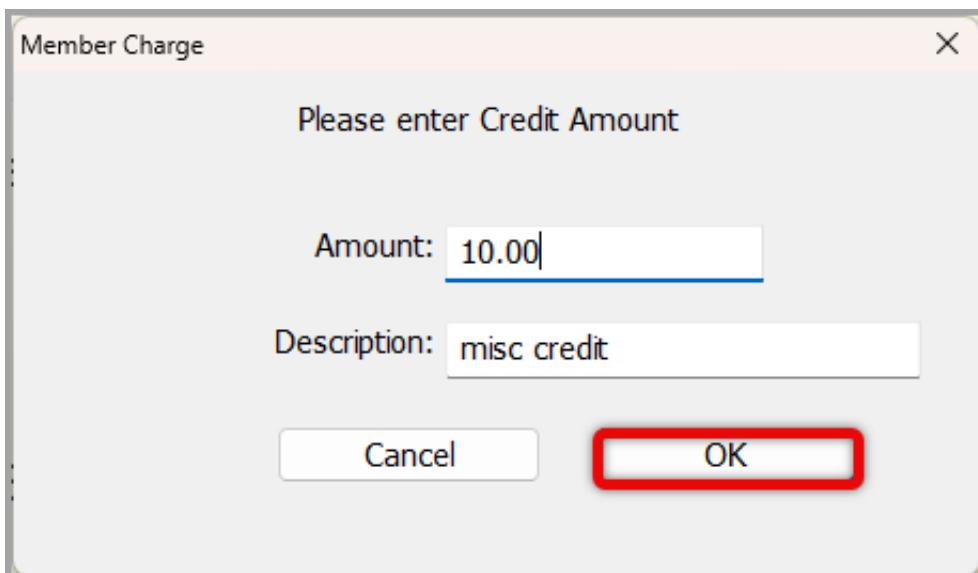
Sorted by: Membership Number

Print Save Copy View in Browser Cancel Continue ?

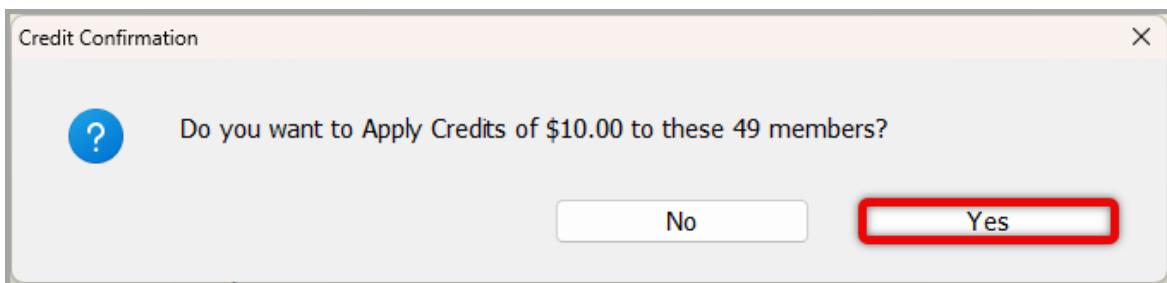
- Choose options to again verify the member list and remove members included in the list if necessary > click **Continue**.



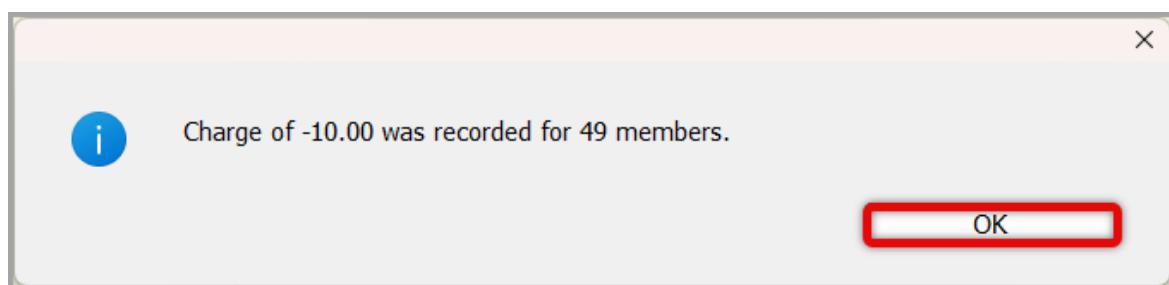
- Enter the Amount and Description > click OK.



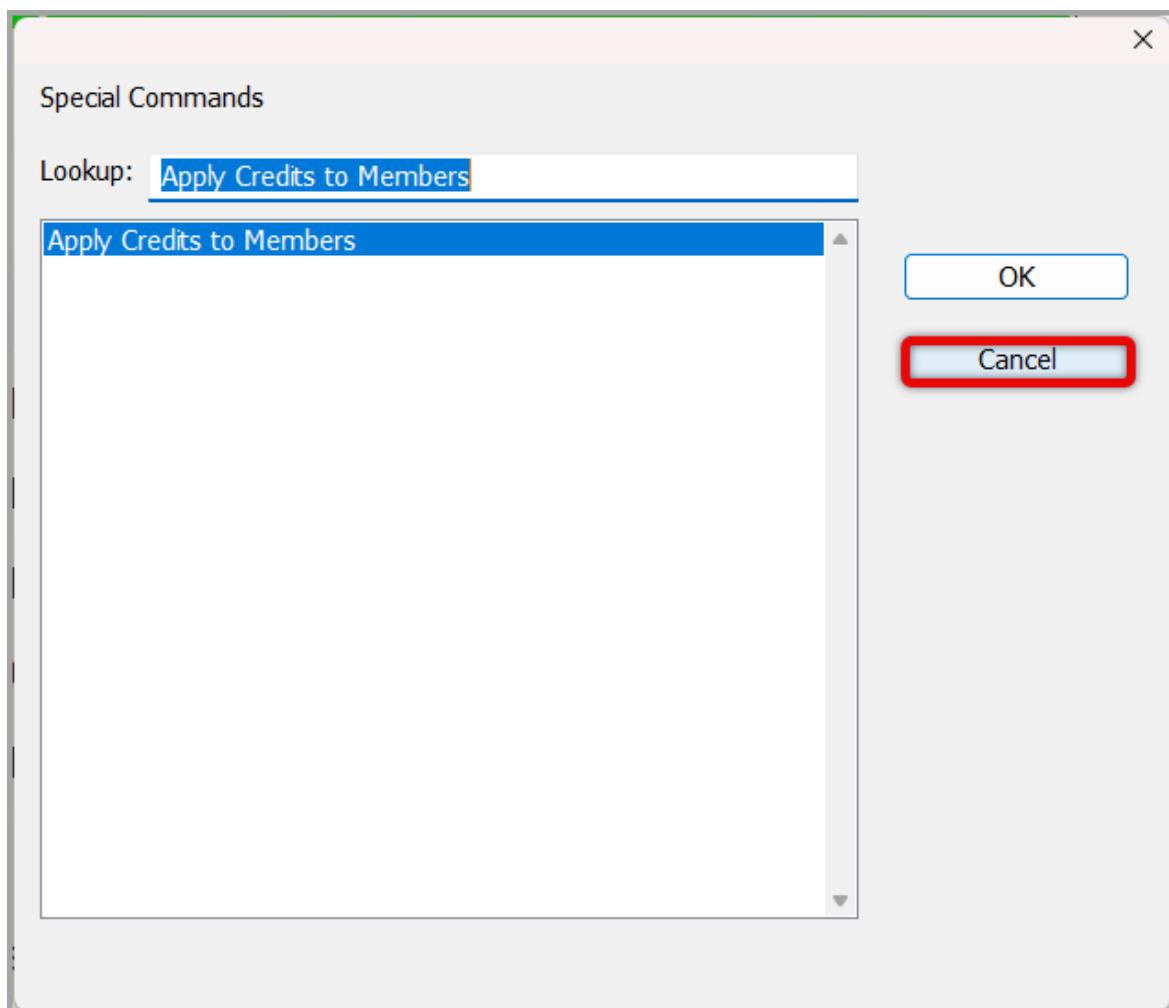
- Click Yes to verify that you do want to Apply Credit to these members.



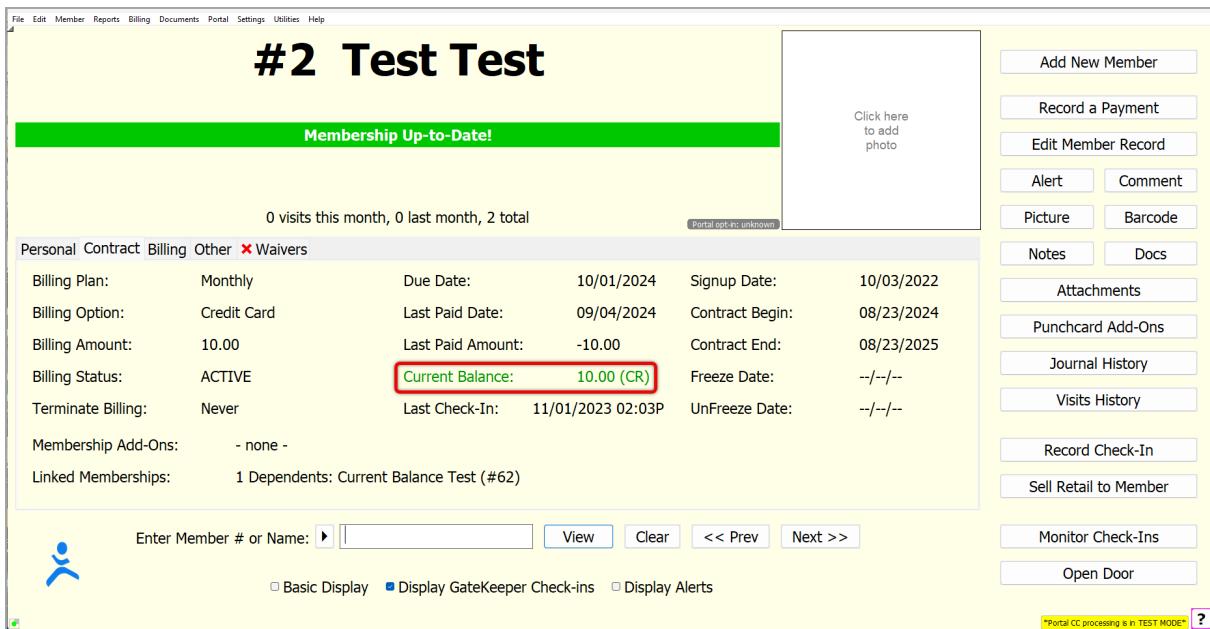
- Ignore that the next screen that talks about adding a charge to these members, it will be a credit > click **OK**.



- 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.



The screenshot shows the Gym Assistant software interface. At the top, there is a navigation bar with links: File, Edit, Member, Reports, Billing, Documents, Portal, Settings, Utilities, and Help. The main title is "#2 Test Test". Below the title, a green bar displays "Membership Up-to-Date!". A message "0 visits this month, 0 last month, 2 total" is shown, along with a note "Portal opt-in: unknown". To the right, there is a placeholder for a photo with the text "Click here to add photo". On the right side of the screen, there is a sidebar with various buttons: Add New Member, Record a Payment, Edit Member Record, Alert, Comment, Picture, Barcode, Notes, Docs, Attachments, Punchcard Add-Ons, Journal History, Visits History, Record Check-In, Sell Retail to Member, Monitor Check-Ins, and Open Door. A note at the bottom right says "Portal CC processing is in TEST MODE". The main content area shows member details: Billing Plan (Monthly), Billing Option (Credit Card), Billing Amount (10.00), Billing Status (ACTIVE), Terminate Billing (Never), Due Date (10/01/2024), Last Paid Date (09/04/2024), Last Paid Amount (-10.00), Contract Begin (08/23/2024), Contract End (08/23/2025), Freeze Date (--/--) and UnFreeze Date (--/--). A green box highlights the "Current Balance: 10.00 (CR)". Below this, it says "Membership Add-Ons: - none -" and "Linked Memberships: 1 Dependents: Current Balance Test (#62)". At the bottom, there is a search bar "Enter Member # or Name: [] View Clear << Prev Next >>" and checkboxes for "Basic Display" (unchecked), "Display GateKeeper Check-ins" (checked), and "Display Alerts" (unchecked).

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