

# How to Charge an Annual (Maintenance) Fee to Members in Gym Assistant

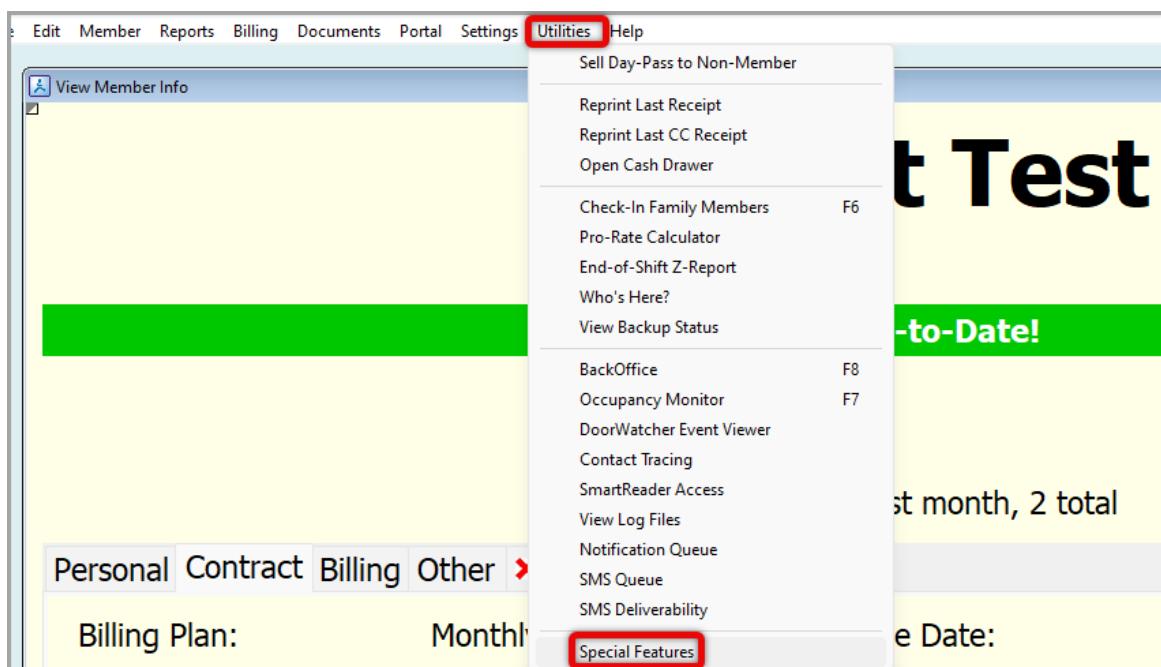
## How to Charge an Annual Fee to Members September 2024

### Introduction

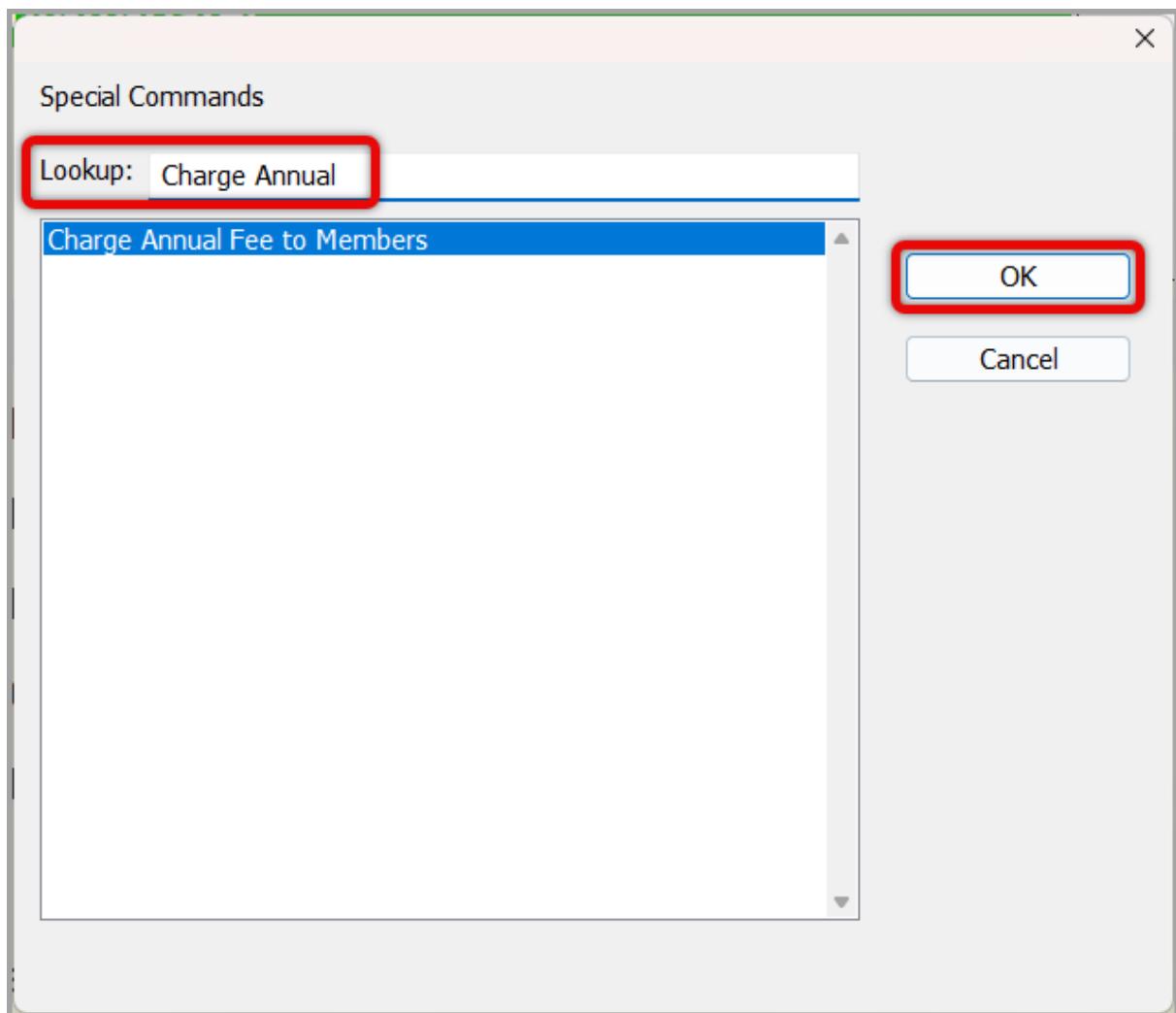
Provides the ability to add an annual fee to members. During this process you can choose to charge the members immediately or for the fee to be added to the members profile to be charged with the next member billing.

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

- Click on **Utilities > Special Features**.



- Type Charge annual Fee to Members in the Lookup > click **OK**.



- Step 1: Specify Fee Parameters by clicking **Edit Fee Parameters**.

Charge Members Fees X

Step 1: Specify Fee Parameters  
Select fees description and amount  
Edit Fee Parameters

Step 2: Generate List of Members  
Select which members will be charged  
Select Members

Step 3: Process Charges  
Process charge as ACH or CC batch  
Process ACH Batch  
Process CC Batch

Step 4: Apply Charges to Members  
Apply charge to member balance for selected members  
Apply Charges

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

Member Charge X

Enter Annual Fee Parameters

Amount: 10.00

Description: Annual Fee

Cancel OK

- Step 2: Generate List of members by clicking **Select Members**.

Charge Members Fees

Step 1: Specify Fee Parameters

\$10.00 for Annual Fee

[Edit Fee Parameters](#) [DONE](#)

Step 2: Generate List of Members

Select which members will be charged

[Select Members](#)

Step 3: Process Charges

Process charge as ACH or CC batch

[Process ACH Batch](#) [Process CC Batch](#)

Step 4: Apply Charges to Members

Apply charge to member balance for selected members

[Apply Charges](#)

- Select Filters for Member List according to members you would like charged the fee > click **Generate List**.

Select Members

Select Filters for Members List:

Plan Types: All 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

[Clear Filters](#) [Cancel](#) [Generate List](#) [?](#)

- Review the list and click **Continue**.

Member List for Charges [Suzette's Gym 09/04/2024]

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	* 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
23	Test, Punch Card	Test Punch Card	ACTIVE	20 Visits	100.00	10 passes
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
29	Tracking Test, Punchcard	Test Punch Card	ACTIVE	20 Visits	100.00	16 passes
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:

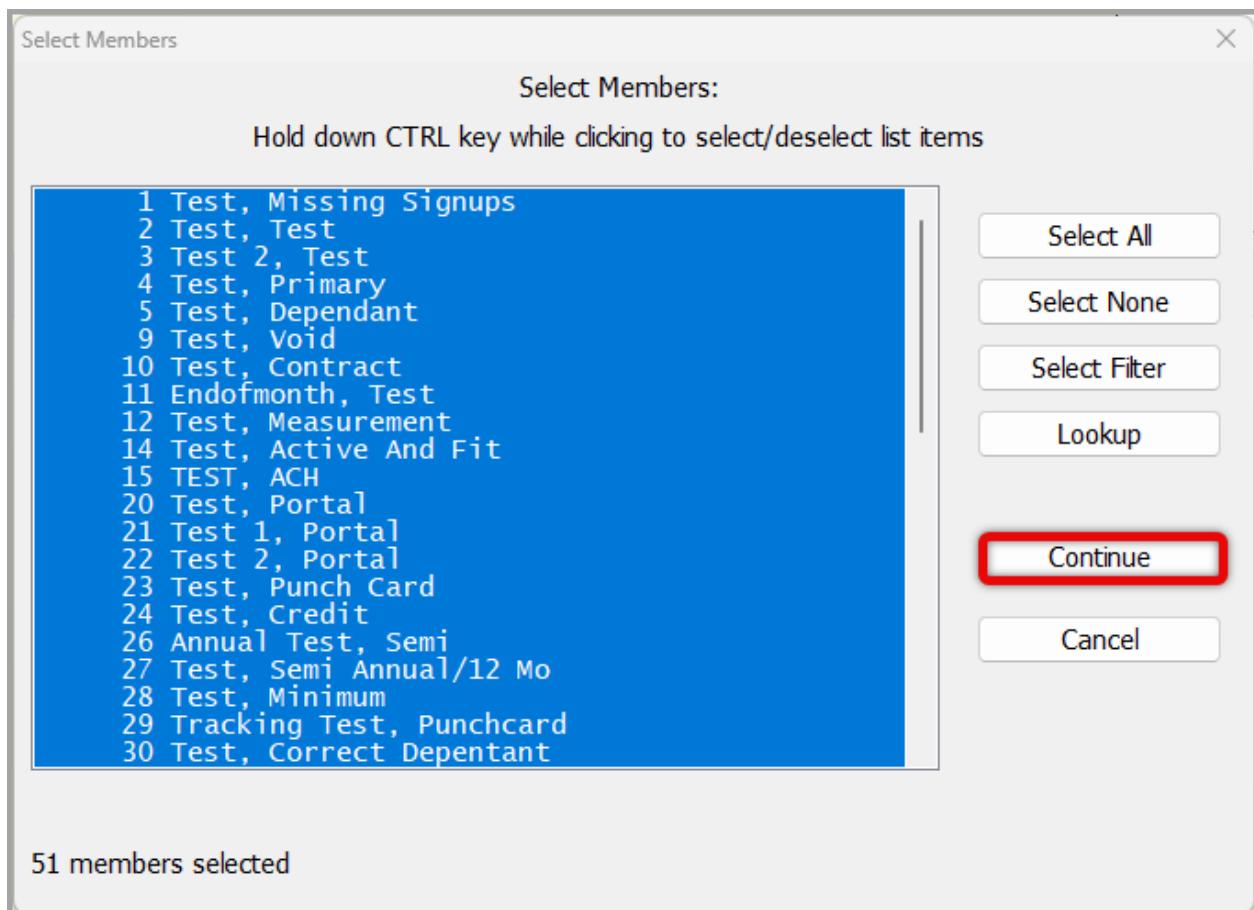
Membership Types: All  
 Billing Status: Active  
 Home Club: ALL

Sorted by: Membership Number

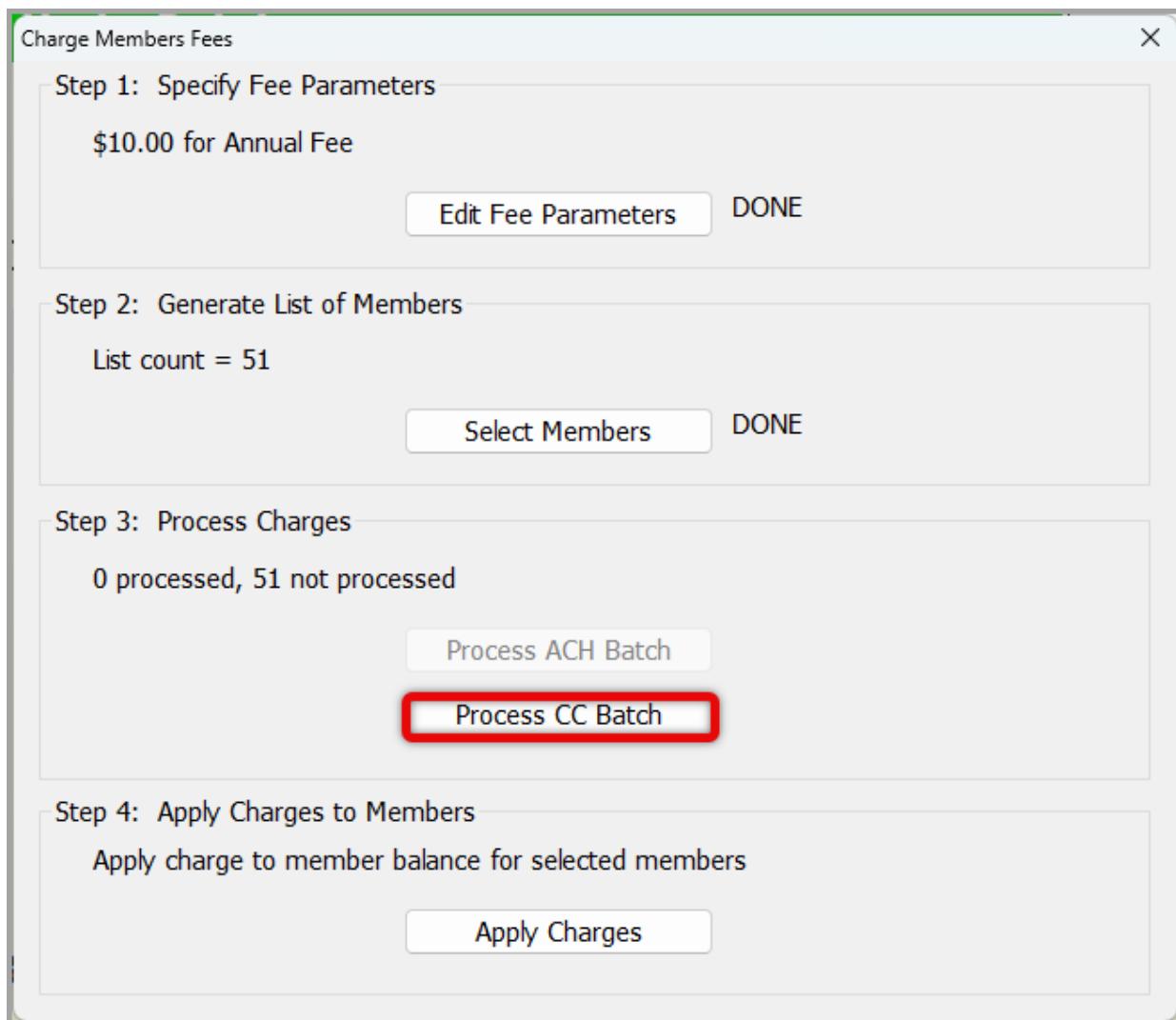
51 matches found

Print Save Copy View in Browser Cancel Continue ?

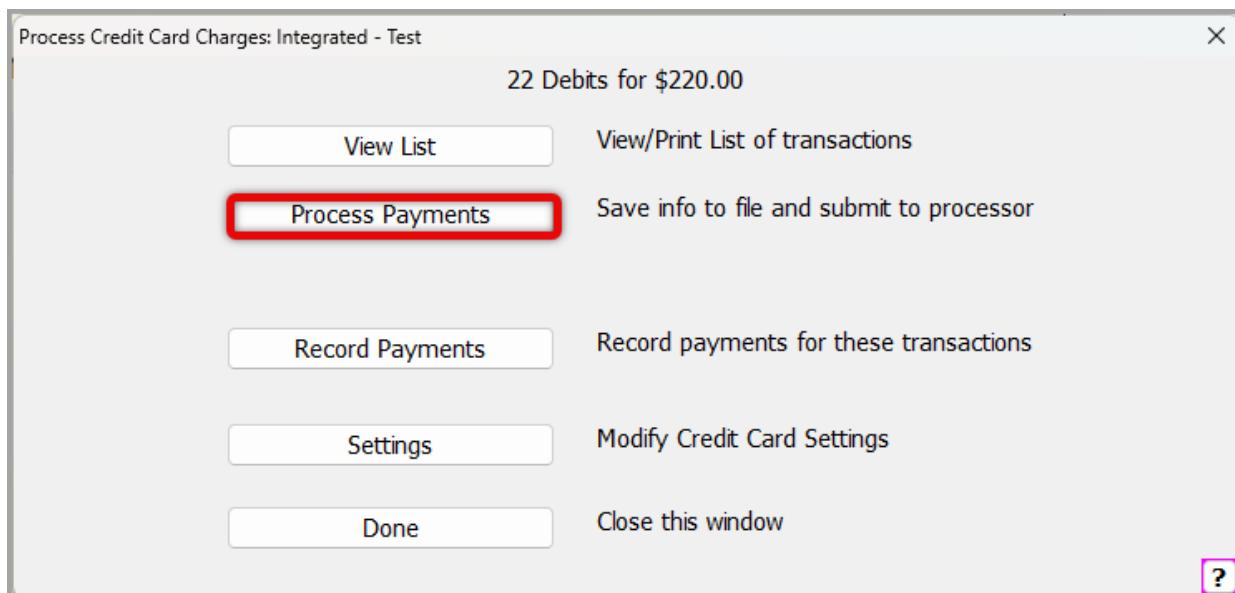
- Select members accordingly > click **Continue**.



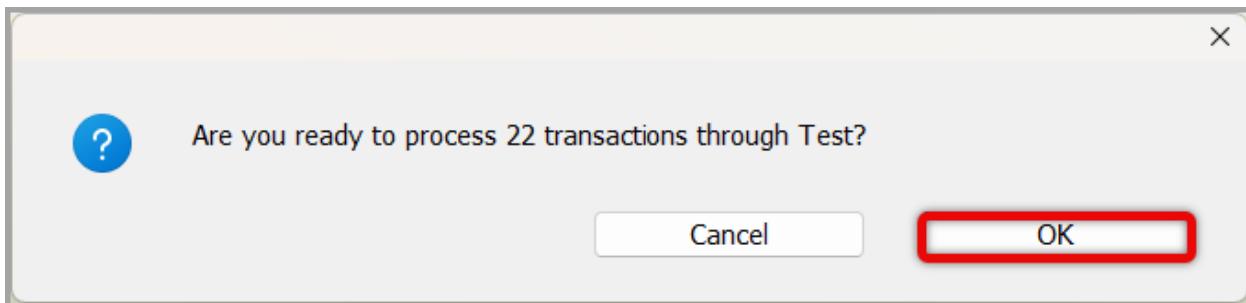
- Step 3: Process Charges by clicking **Process CC Batch** or **Process ACH batch**, depending, and if you would like to process the charge at that time.



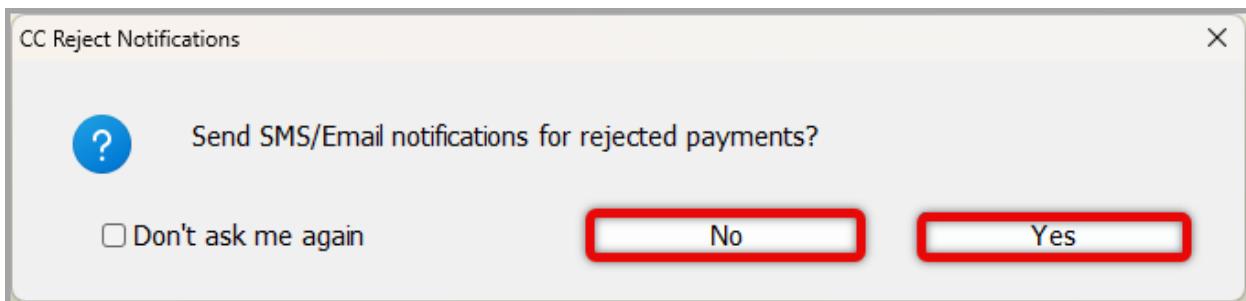
- Click Process Payments accordingly.



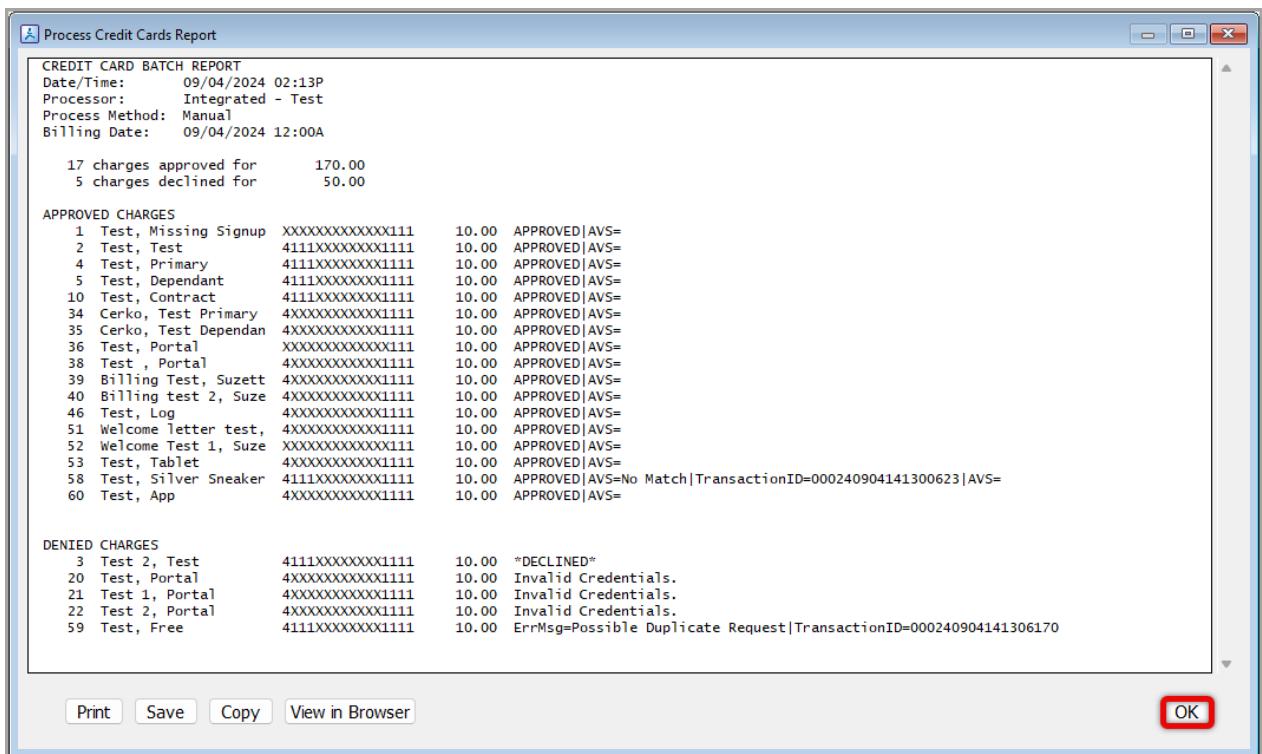
- Click OK when ready to process transactions.



- Click **Yes** or **No** accordingly when asked to Send SMS/Email notifications for rejected payments?



- Click **OK** after the Credit Card Batch Report has been reviewed > click **Done** > click **OK** > click **X** at upper right when finished.

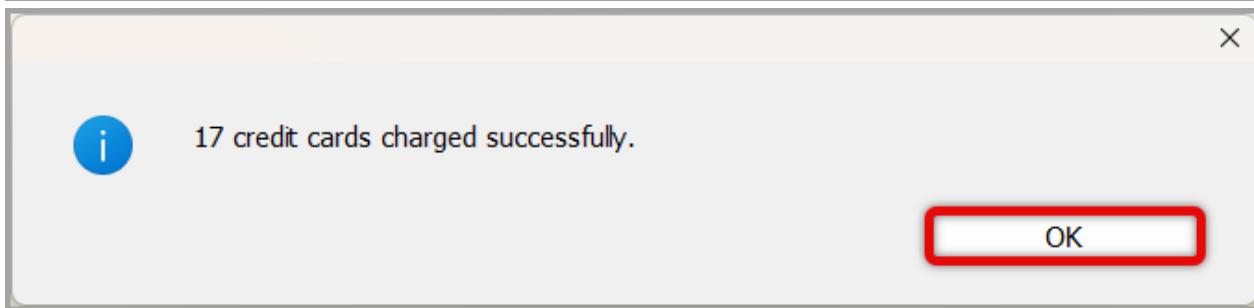


Process Credit Card Charges: Integrated - Test X

22 Debits for \$220.00

<a href="#">View List</a>	View/Print List of transactions
< Done! > <a href="#">Process Payments</a>	Save info to file and submit to processor
<a href="#">Record Payments</a>	Record payments for these transactions
<a href="#">Settings</a>	Modify Credit Card Settings
<a href="#">Done</a>	Close this window

[?](#)



Charge Members Fees X

Step 1: Specify Fee Parameters  
\$10.00 for Annual Fee

Edit Fee Parameters DONE

Step 2: Generate List of Members  
List count = 51

Select Members DONE

Step 3: Process Charges  
17 processed, 34 not processed

Process ACH Batch Process CC Batch DONE

Step 4: Apply Charges to Members  
Apply charge to member balance for selected members

Apply Charges

- Step 4: as an alternative to charging the fee immediately, you can select **Apply Charges to Members** instead which adds the charge to the members next billing. In this case, you will bypass Step 3 and instead select Step 4 and click **Apply Charges**.

Charge Members Fees X

Step 1: Specify Fee Parameters  
\$10.00 for Annual Fee

Edit Fee Parameters DONE

Step 2: Generate List of Members  
List count = 51

Select Members DONE

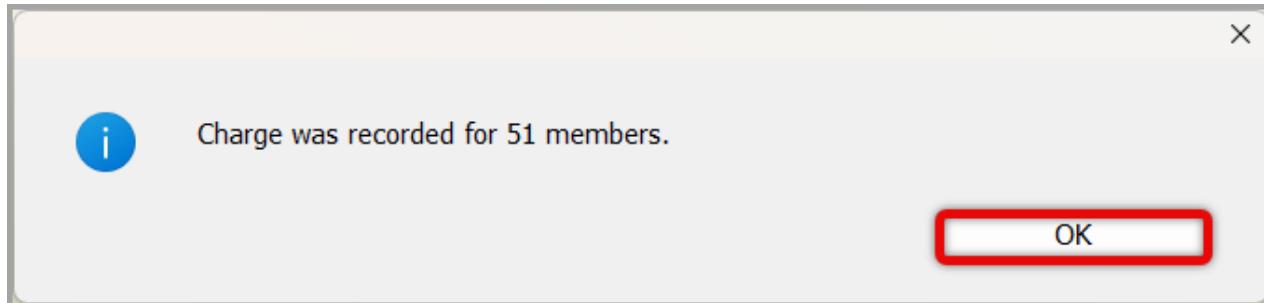
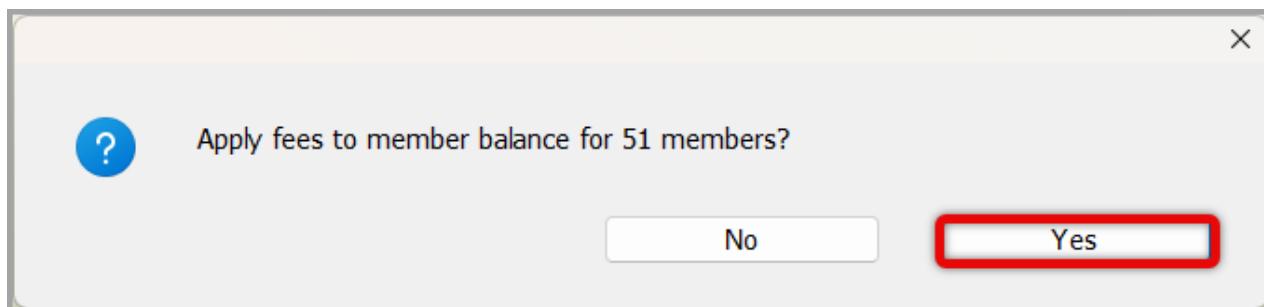
Step 3: Process Charges  
0 processed, 51 not processed

Process ACH Batch  
Process CC Batch

Step 4: Apply Charges to Members  
Apply charge to member balance for selected members

Apply Charges

- Click **Yes** > click **OK** indicating Charge was recorded for members > click **X** in upper right corner to close the page.



Charge Members Fees X

Step 1: Specify Fee Parameters  
\$10.00 for Annual Fee

Edit Fee Parameters **DONE**

Step 2: Generate List of Members  
List count = 51

Select Members **DONE**

Step 3: Process Charges  
0 processed, 51 not processed

Process ACH Batch  
Process CC Batch

Step 4: Apply Charges to Members  
Apply charge to member balance for selected members

Apply Charges **DONE**

- The charges will appear under Current Balance in red on the profiles of each member the charge was applied to, and be included in the next membership payment due and processed.

View Member Info

# #2 Test Test

Membership Up-to-Date!

0 visits this month, 0 last month, 2 total

Click here to add photo

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	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

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

Open Door

Portal CC processing is in TEST MODE!

Online URL: <https://gymassistant.phpkb.cloud/article/how-to-charge-an-annual-maintenance-fee-to-members-in-gym-assistant.html>