

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

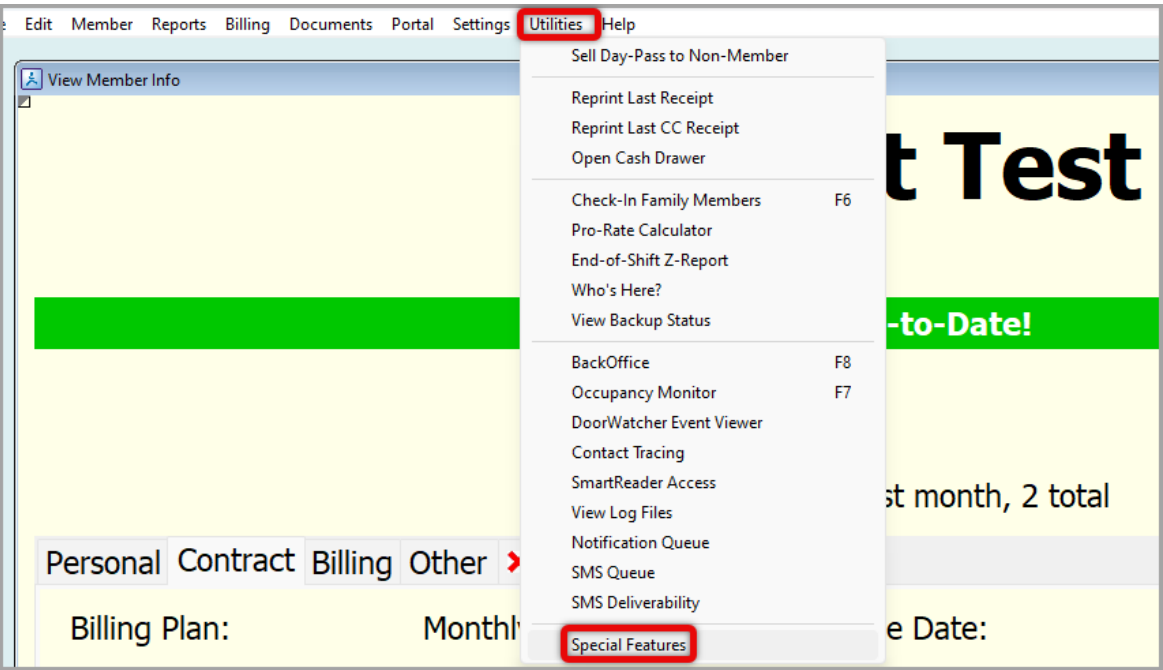
How to Charge an Annual Fee to Members September 2024

Introduction

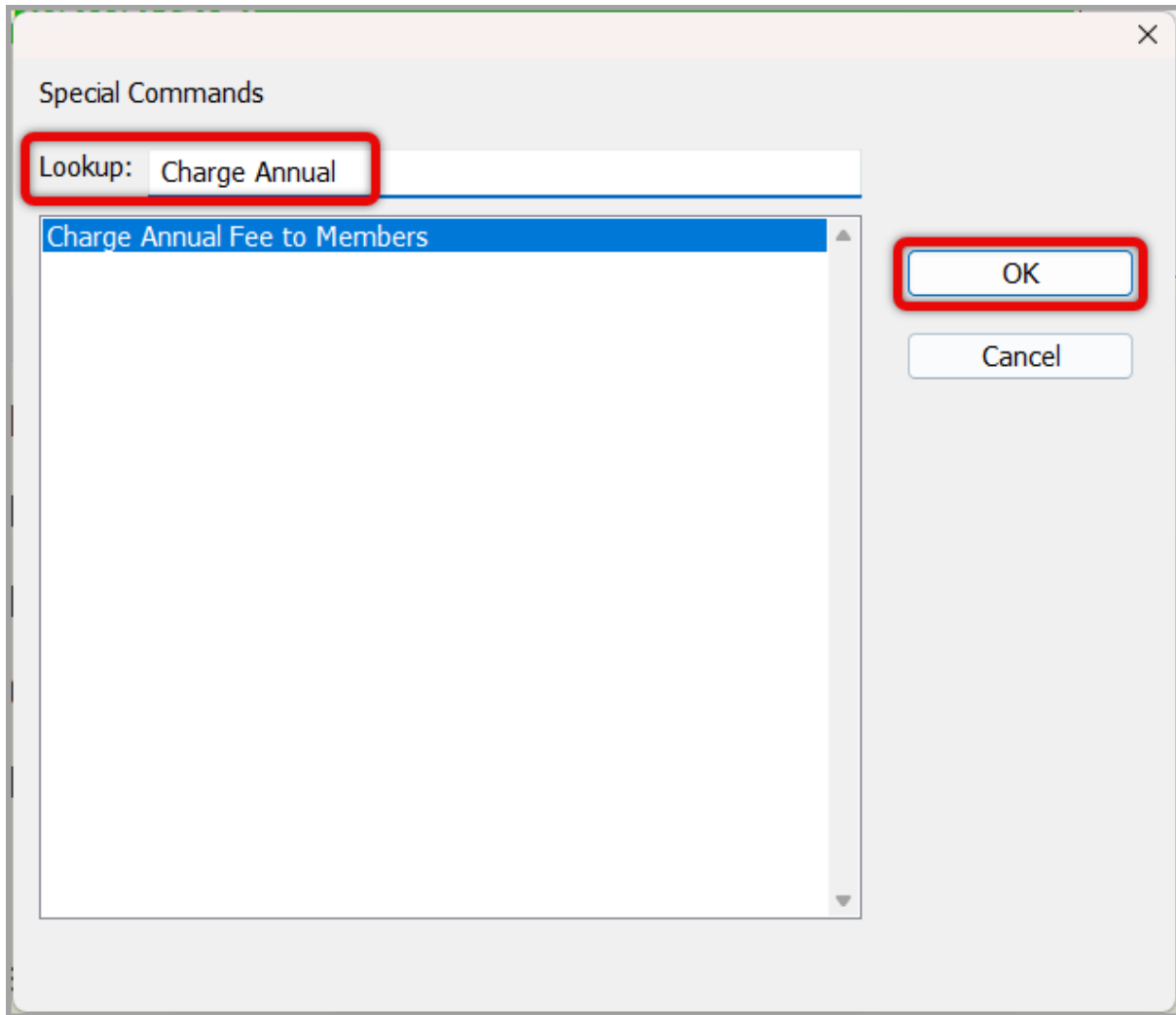
Provides the ability to add an annual fee to members. During this process you can choose to charge the members immediately or for the fee to be added to the members profile to be charged with the next member billing.

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

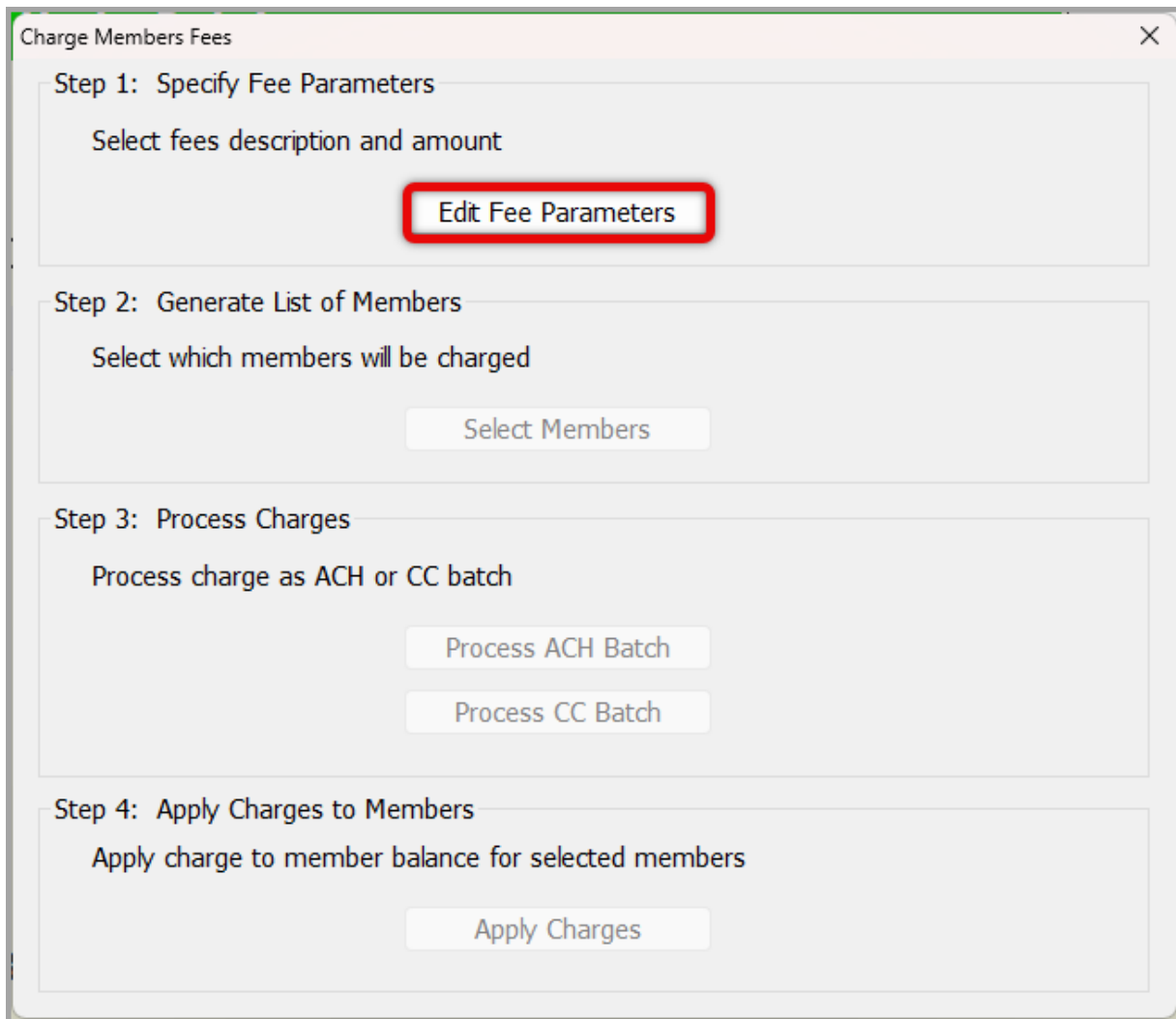
- Click on **Utilities > Special Features**.



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

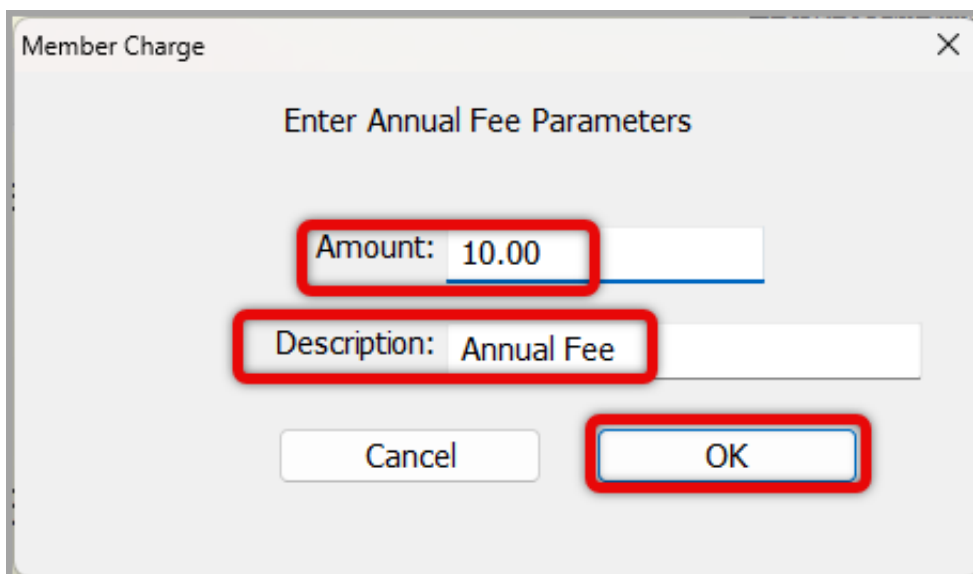


- Step 1: Specify Fee Parameters by clicking **Edit Fee Parameters**.



The 'Charge Members Fees' dialog box is divided into four steps. Step 1, 'Specify Fee Parameters', includes a text prompt 'Select fees description and amount' and a button labeled 'Edit Fee Parameters' which is highlighted with a red rectangle. Step 2, 'Generate List of Members', includes a text prompt 'Select which members will be charged' and a button labeled 'Select Members'. Step 3, 'Process Charges', includes a text prompt 'Process charge as ACH or CC batch' and two buttons: 'Process ACH Batch' and 'Process CC Batch'. Step 4, 'Apply Charges to Members', includes a text prompt 'Apply charge to member balance for selected members' and a button labeled 'Apply Charges'.

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



The 'Member Charge' dialog box is titled 'Enter Annual Fee Parameters'. It contains two input fields: 'Amount:' with the value '10.00' and 'Description:' with the value 'Annual Fee'. Both input fields are highlighted with red rectangles. At the bottom, there are two buttons: 'Cancel' and 'OK', with the 'OK' button highlighted by a red rectangle.

- 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:

Memorized Reports:

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

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

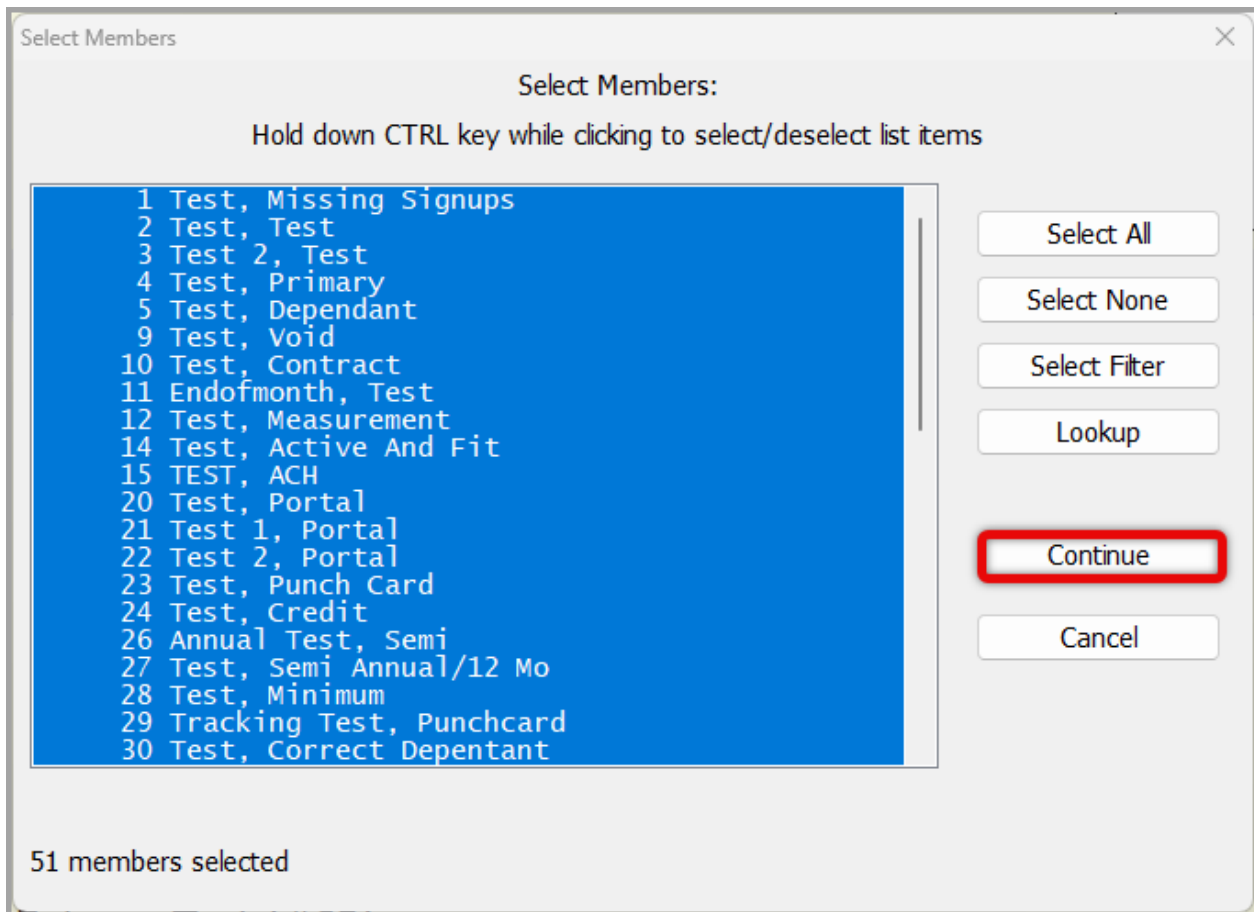
Member List for Charges [Suzette's Gym 09/04/2024]

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	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
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.

Charge Members Fees

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 **Process Payments** accordingly.

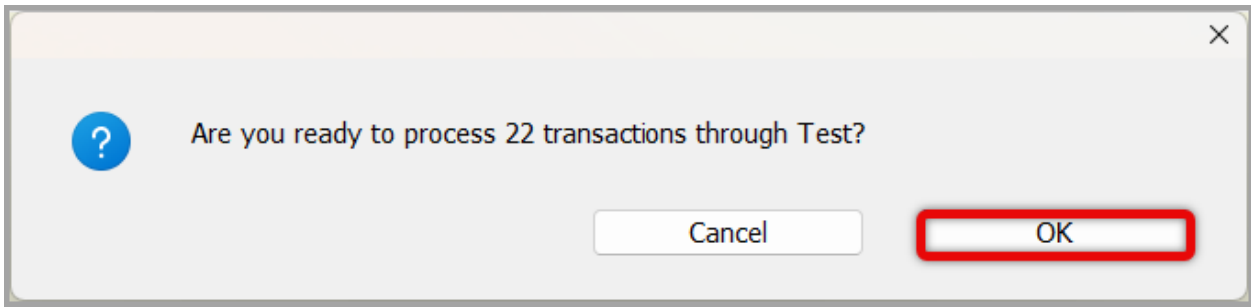
Process Credit Card Charges: Integrated - Test

22 Debits for \$220.00

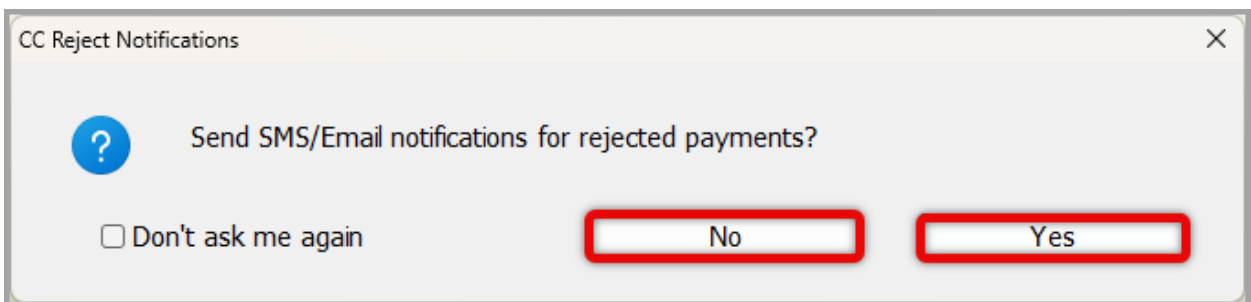
View List	View/Print List of transactions
Process Payments	Save info to file and submit to processor
Record Payments	Record payments for these transactions
Settings	Modify Credit Card Settings
Done	Close this window

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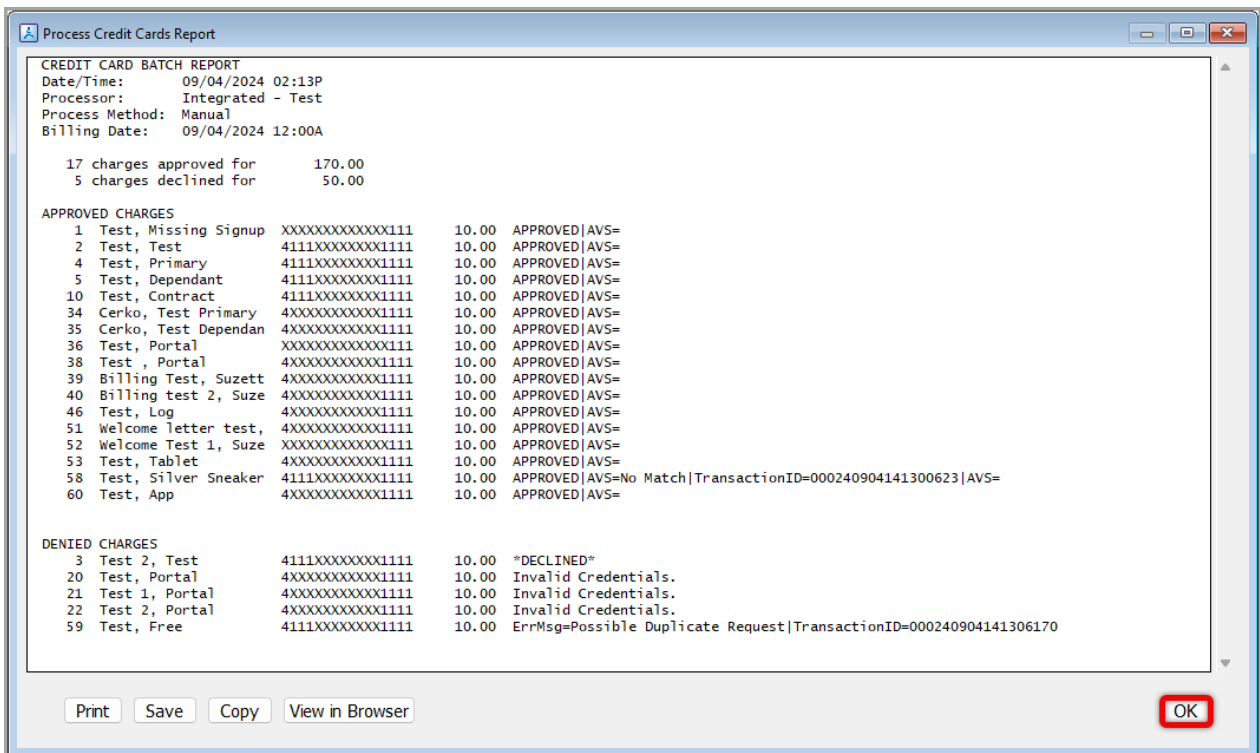
- Click **OK** when ready to process transactions.



- 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

22 Debits for \$220.00

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

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17 credit cards charged successfully.

OK

Charge Members Fees

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 ✕

Step 1: Specify Fee Parameters

\$10.00 for Annual Fee

Step 2: Generate List of Members

List count = 51

Step 3: Process Charges

0 processed, 51 not processed

Step 4: Apply Charges to Members

Apply charge to member balance for selected members

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

? Apply fees to member balance for 51 members? ✕

i Charge was recorded for 51 members. ✕

Charge Members Fees

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

Personal

Contract

Billing

Other

Waivers

Billing Plan: Monthly

Billing Option: Credit Card

Billing Amount: 10.00

Billing Status: ACTIVE

Terminate Billing: Never

Membership Add-Ons: - none -

Linked Memberships: 1 Dependents: Current Balance Test (#62)

Due Date: 10/01/2024

Last Paid Date: 09/04/2024

Last Paid Amount: 10.00

Current Balance: 10.00

Last Check-In: 11/01/2023 02:03P

Signup Date: 10/03/2022

Contract Begin: 08/23/2024

Contract End: 08/23/2025

Freeze Date: --/--

Unfreeze Date: --/--

Click here to add photo

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

Enter Member # or Name:

View

Clear

<< Prev

Next >>

☐ Basic Display
☒ Display GateKeeper Check-ins
☐ Display Alerts

*Partial 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>