

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

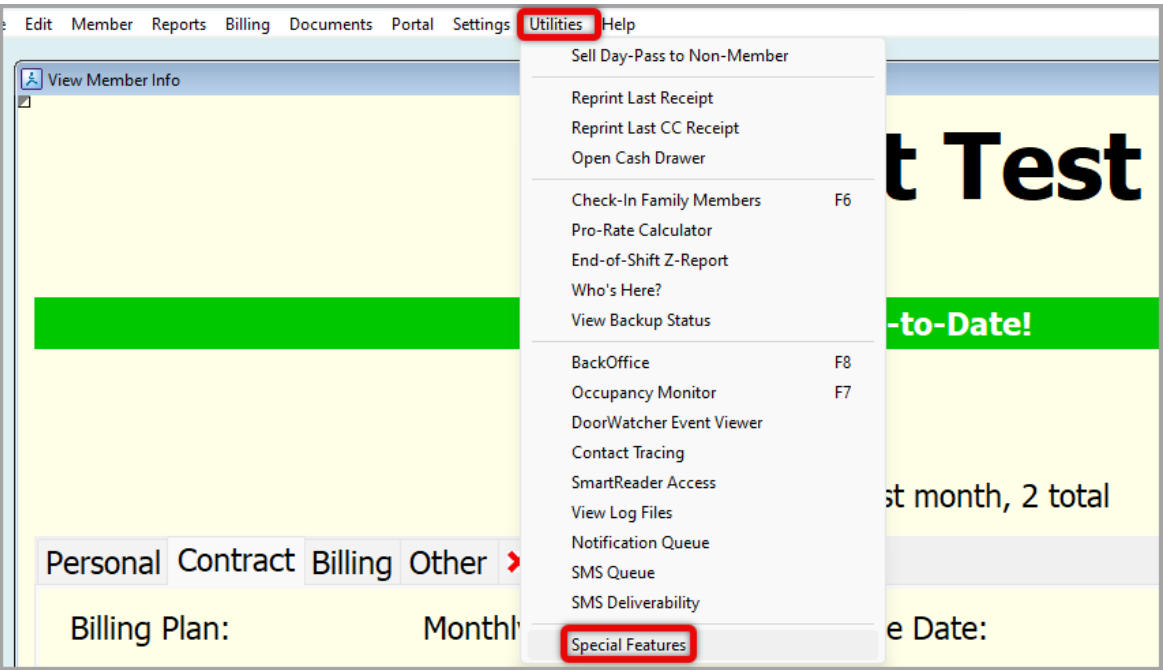
## How to Charge an Annual Fee to Members September 2024

### Introduction

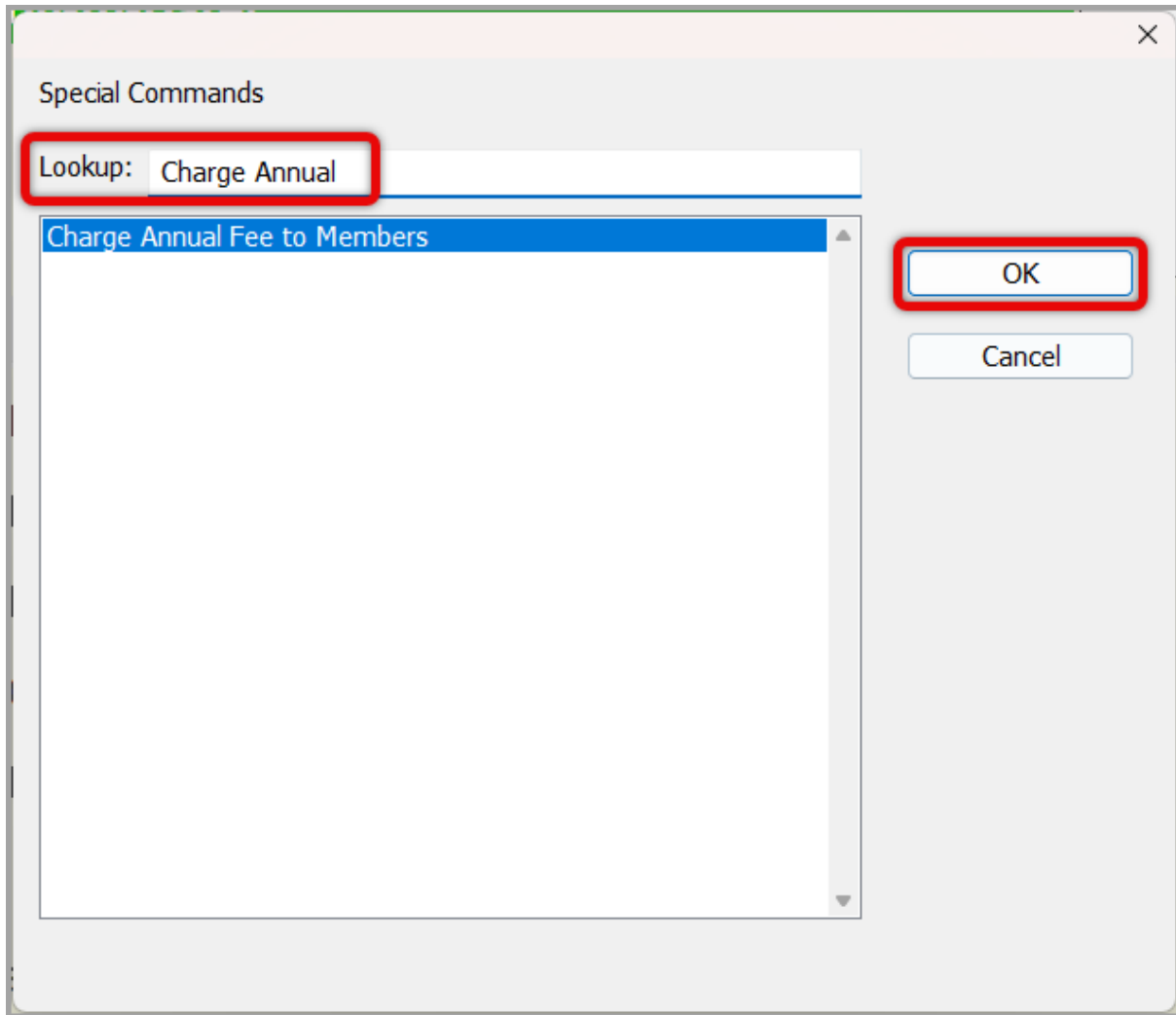
Provides the ability to add an annual fee to members. During this process you can choose to charge the members immediately or for the fee to be added to the members profile to be charged with the next member billing.

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

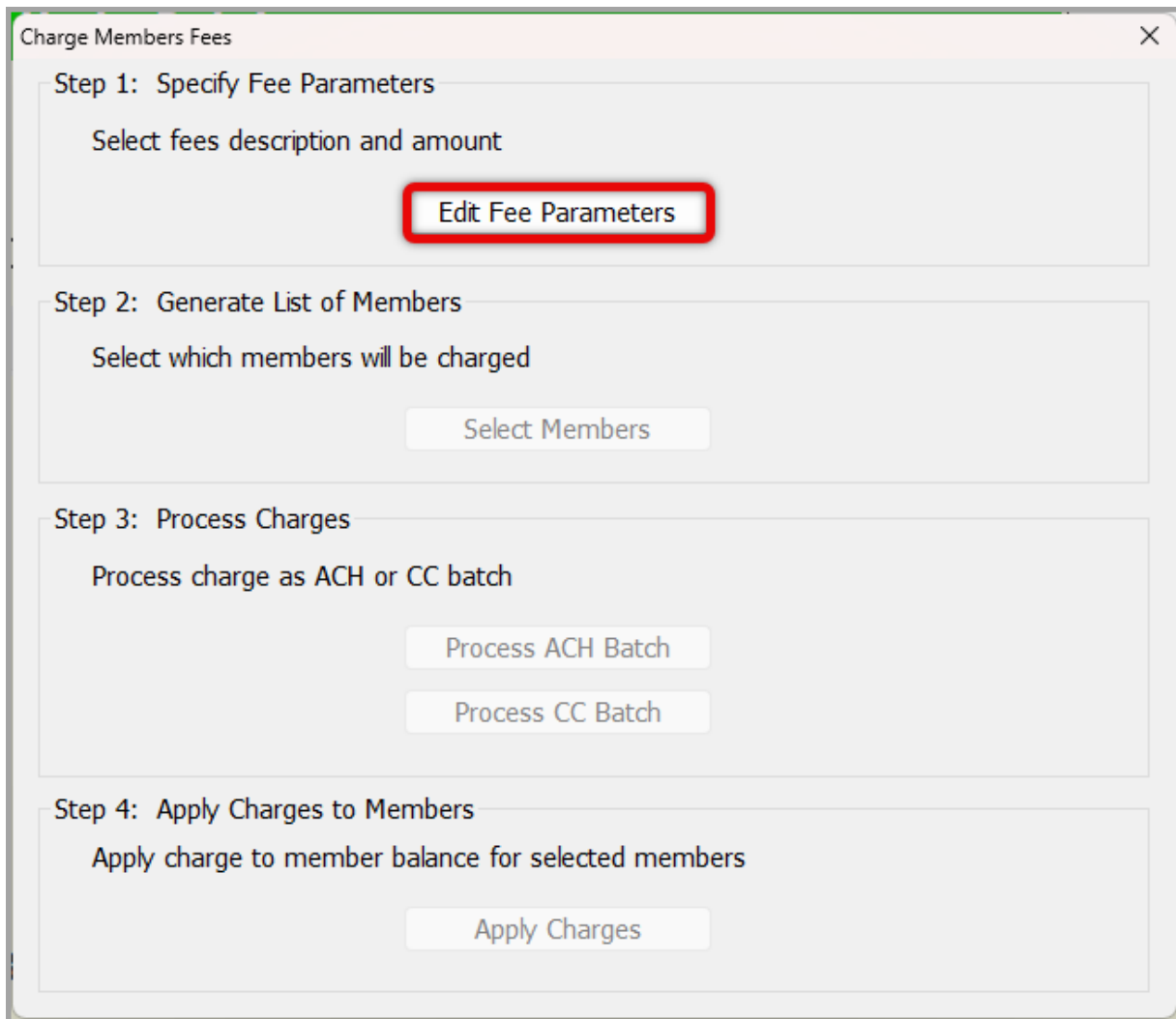
- Click on **Utilities > Special Features**.



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

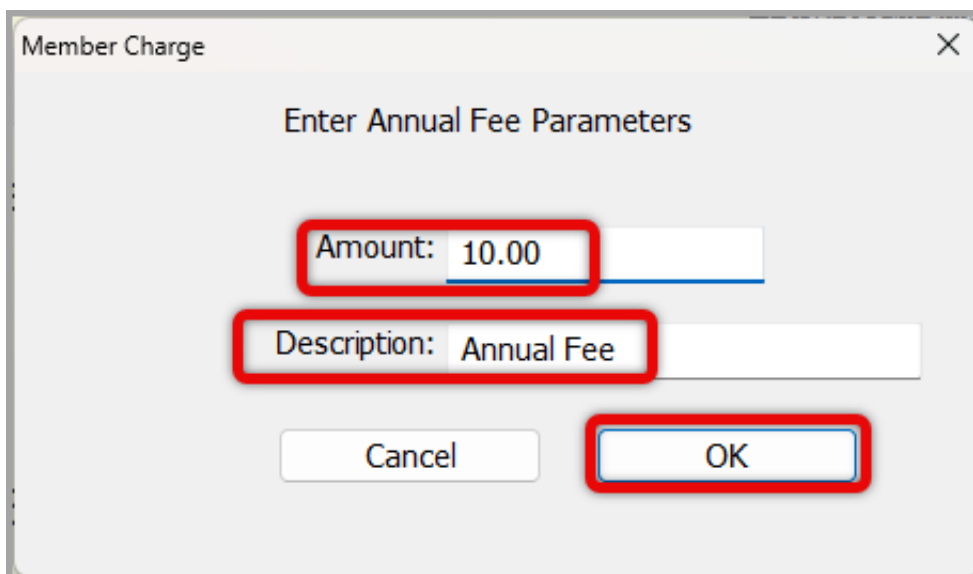


- Step 1: Specify Fee Parameters by clicking **Edit Fee Parameters**.



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 the prompt 'Select which members will be charged' and a button labeled 'Select Members'. Step 3, 'Process Charges', includes the 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 the 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

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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

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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**.

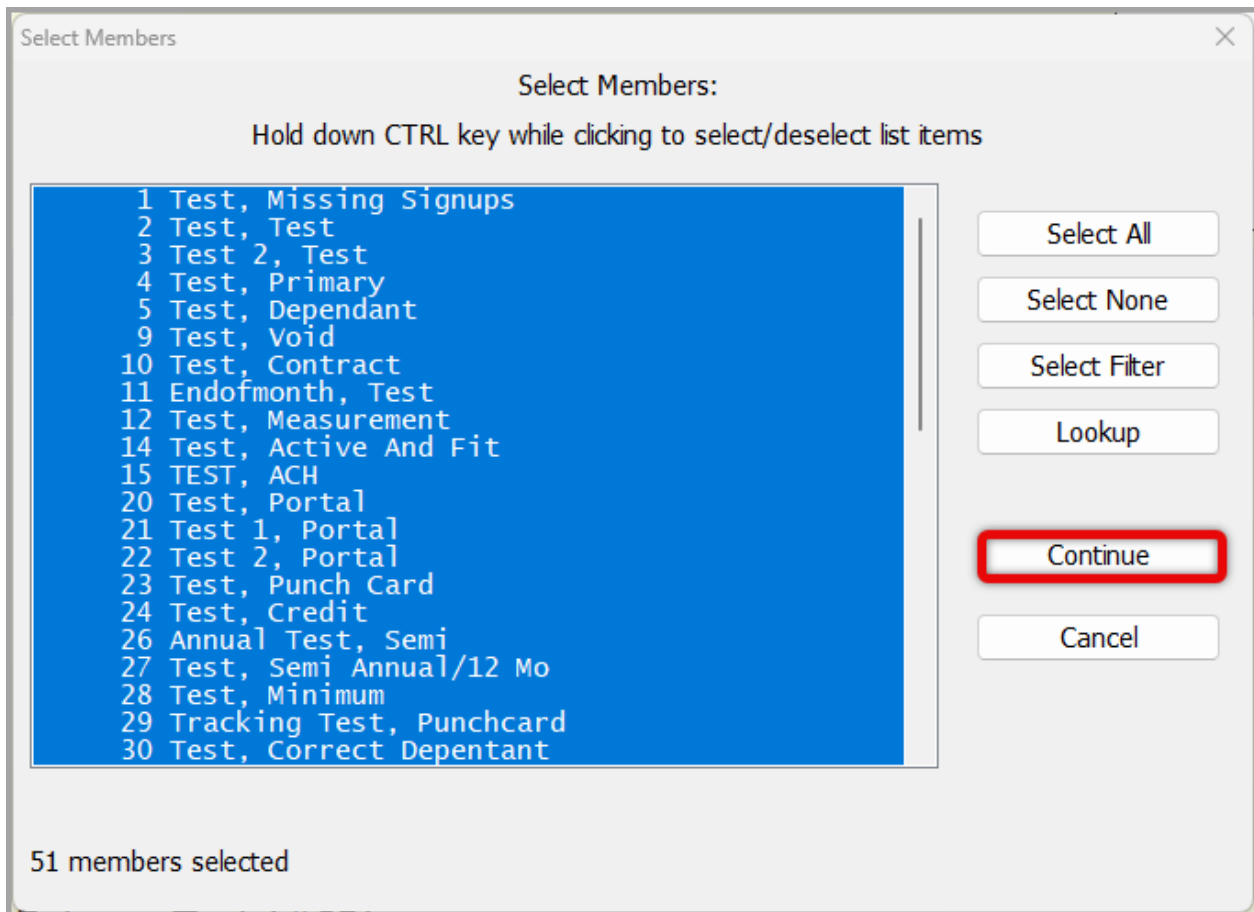
Member List for Charges [Suzette's Gym 09/04/2024]

| 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

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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

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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

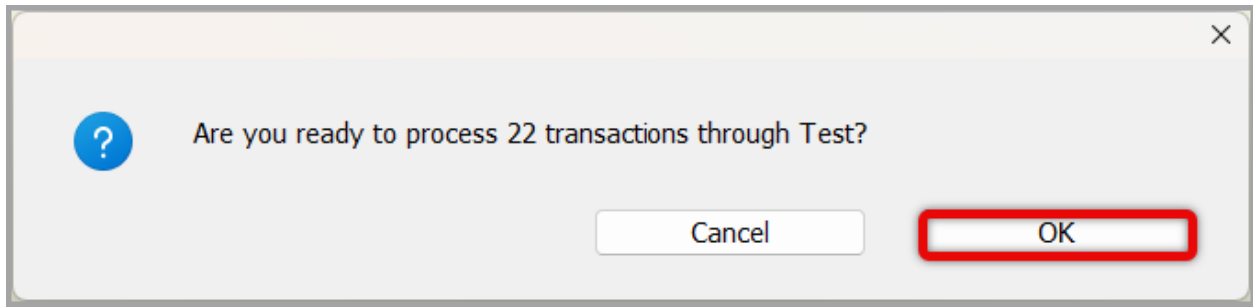
Modify Credit Card Settings

Done

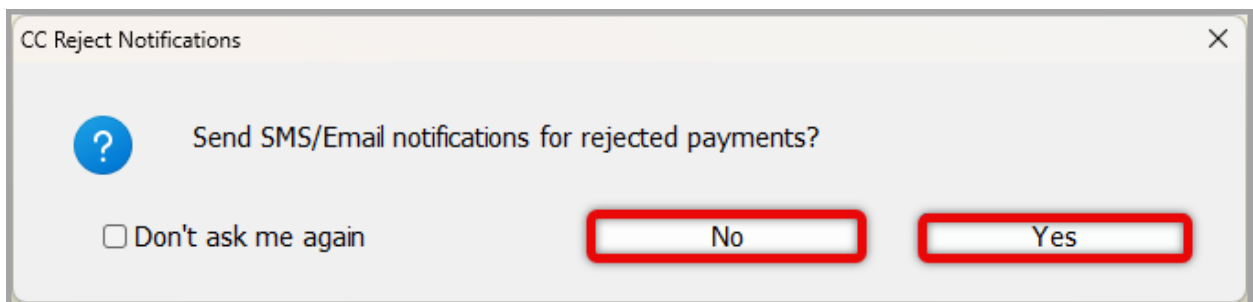
Close this window

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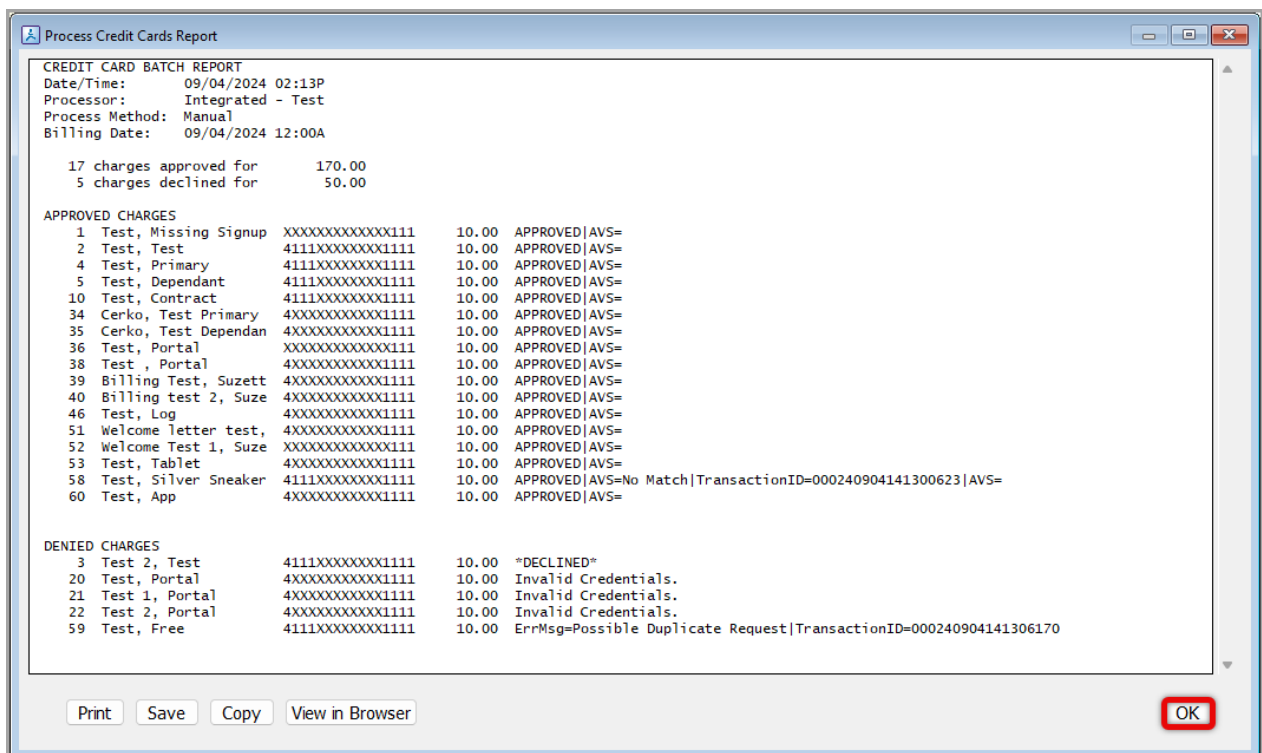
- Click **OK** when ready to process transactions.



- 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

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)

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>