gym assistant™

User Guide

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Summary

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Chapter 1 - Getting Started

Welcome to Gym Assistant

Gym Assistant is an effective yet simple-to-use system to help the gym owner manage and maintain club memberships. Rather than attempting to be the "ultimate" club management system, Gym Assistant provides an easy-to-use solution for the small to medium sized gym with modest administrative requirements.

This guide describes how to get started with Gym Assistant.

System Requirements

Operating System

Gym Assistant will run on any of the following versions of Windows:

- Windows XP
- Windows Vista
- Windows 7
- Windows 8

Gym Assistant will run on 32- or 64-bit versions of Windows.
Gym Assistant will run on Home, Pro or Ultimate versions of Windows.

Suggested Software/Hardware:

- Windows XP: 1 GB RAM suggested, 512 MB minimum
- Windows 7 or 8:   2 GB RAM suggested, 1 GB minimum
- 20 MB hard disk space available

If you will be using a barcode reader, door controller, receipt printer or cash drawer then you will also need a 9-pin serial port for each of these devices.

Most new computers do not include built-in serial ports, but you can very easily add serial ports with one or more USB/Serial adapters ($30-40 at most computer supply stores or online).

Concepts and Terminology

Before installing and using **Gym Assistant** it is important that you have an understanding of some basic concepts and terminology that will be used in the software and in this guide. This section offers a brief overview of these terms. More details can be found elsewhere in this document.

Membership Record

Every member in **Gym Assistant** has a member record. The Member Record contains all information about a member including personal Information (name, address, birth date, emergency contact, etc.), contract and billing information, and other information (custom fields) that can be tailored for your specific needs.

Check-In

A check-in (or visit) is recorded each time the member walks into the club. Check-in can happen either <u>automatically</u> (the member scans a barcode or enters a number of a numeric keypad) or manually (front-desk staff scans the barcode or types in the member's name or membership number).

Structured Pricing

Gym Assistant was designed as a structured system. Once you specify your pricing structure, Gym Assistant ensures that every membership fits into that structure. This design gives you optimal control over your memberships for the long term. To change the pricing for one of your membership plans you only need to change the standard price for that membership plan and every member with that plan will automatically renew at the new rate.

Membership, Visitor and Day-Pass Plans

Gym Assistant allows you to create three different types of memberships: Membership Plans, Punchcard Plans and Day-Pass Plans.

A **Membership Plan** is time-based. The member pays a defined amount for a given period of time. A membership plan has a billing period (for example, every month), and it can also have a contract length. Contracts, however, are not required. You can use the contract length as a minimum commitment (in which case billing will continue after the contract is fulfilled), or you can specify that the member will be terminated at the end of the contract (billing will stop until they sign a new contract).

A **Punchcard Plan** is based on visit, rather than time. A member with a Punchcard Plan will buy a package of entries into the club. Each time the member checks in at the front desk one visit is automatically deducted from his total number of visits remaining. Check-in can be done either by swiping a card or by checking in with staff.

A **Day-Pass Plan** requires that a member pay for each visit individually. A Day-Pass plans can be used either members or non-members (drop-ins).

Family (Dependent) Memberships

Family memberships can be linked together so that all billing is charged to one of the family members. The member who pays is the Responsible member, and the members who are linked to the Responsible member are Dependents.

Membership Add-Ons

A Membership Add-On is anything that can be paid for separate from the regular membership. Some common examples of member add-ons would be personal training sessions, aerobics classes and tanning sessions. Note that add-ons are very different than Punchcard Plans. With a Punchcard Plan, one visit is deducted every time the

member walks into the club. With a Membership Add-On, a credit is deducted only when the member uses one of her pre-purchased add-on credits.

Transaction Journal

Every transaction that occurs in Gym Assistant is recorded in the Journal file. This feature allows you to track not only financial transactions (such as adding a member or recording a payment), but also changes to member records (such as changing a member's due date or adding a comment to a member's record).

Visits Log

Every member check-in (allowed or denied) is recorded in the Visits file. This feature allows you to review who came into the facility on any given day or to list all of the visits for a particular member.

Billing/Payment Options

Memberships can be paid either by manual payment or automatic billing. Manual payments may be received in-person, or they may be received in the mail (for example, if you send out invoices). Automatic Billing will either deduct fees from a member's bank account (checking or savings) or charge fees to the member's credit card.

EFT (Electronic Funds Transfer)

While the term "EFT" technically refers only to electronic transactions through bank accounts, this term is often used to also include all methods of automatic billing. Gym Assistant provides the tools necessary to interface with various EFT processors and payment systems including ACH (Automated Clearing House – electronic bank transfers), paper draft and credit cards.

Access Control

Gym Assistant can control access through an electronically-controlled door or turnstile. When a member swipes a barcode through a reader, the system determines if that member should be allowed access and sends a signal to unlock the door. All card swipes (even denied entries) are recorded for later review.

Steps Needed to Complete Installation & Setup

In setting up **Gym Assistant** for the first time, we recommend that you carry out the following steps below in order.

You will find each part explained in detail below in their relevant sections.

> _**Note**_: _Some steps below may not apply to your installation._

1. Install the software
2. Enter "Business Info"
3. Create "Member Plans (Pricing Structure)"
4. Set "Sales Tax rates"
5. Create "Membership Add-Ons"
6. Review "Measurement Settings"
7. Review "Custom Fields"
8. Review "General Billing Options"
9. Setup Access Control and GateKeeper
10. Setup camera and PhotoCapture
11. Setup Dual Monitor configuration
12. Setup Cash Drawer
13. Setup Networking on other workstations
14. Add New Members

Installing the Software

1. Go to http://gymassistant.com/support/installers/index.php.

2. Select the most recent version of Gym Assistant (as of this user guide, it is Ver. 2.02).

3. Enter the password sent with your registration email.

Gym Assistant 2.0.2 Downloads
Please enter password to view installers.

Password: [_____] [Submit]

> *Note: If you do not remember the password, please contact Gym Assistant for assistance.*

4. Download the most recent version of Gym Assistant installer ("GymAsstXXX_Setup.exe").

5. Double-click on the file to start the installation process.

6. In the Gym Assistant Setup window that appears, click **Next**.
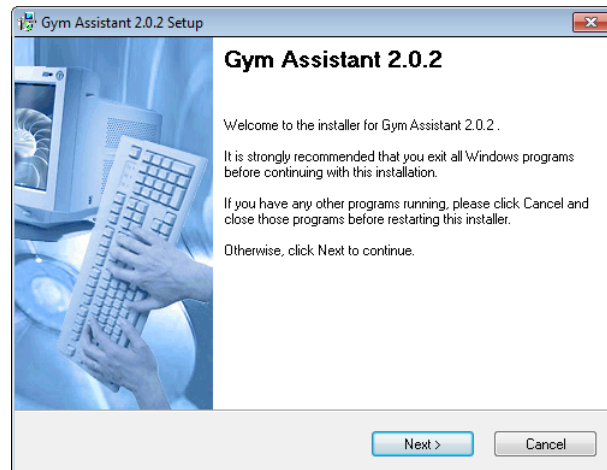
7. In the Installation Folder window that appears, click **Yes**. Do not change the installation folder unless instructed by Gym Assistant Support.
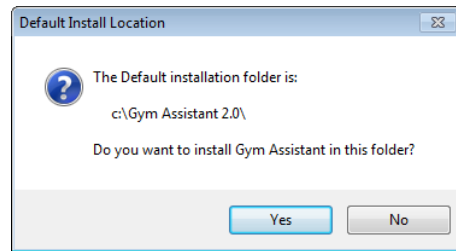
8. In the "Ready to Install" window that appears, click **Next**.
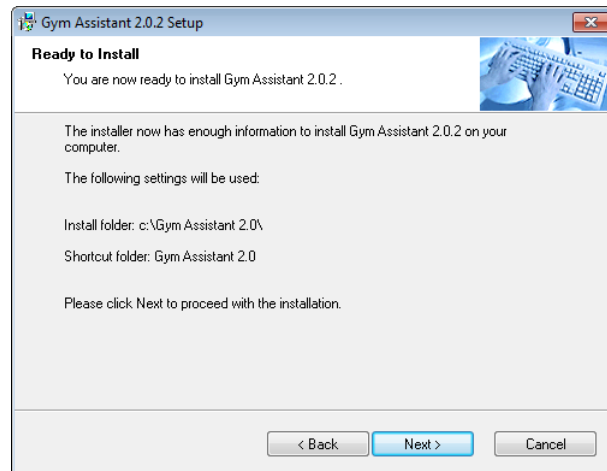
9. After the installation is complete, click **Finish**.
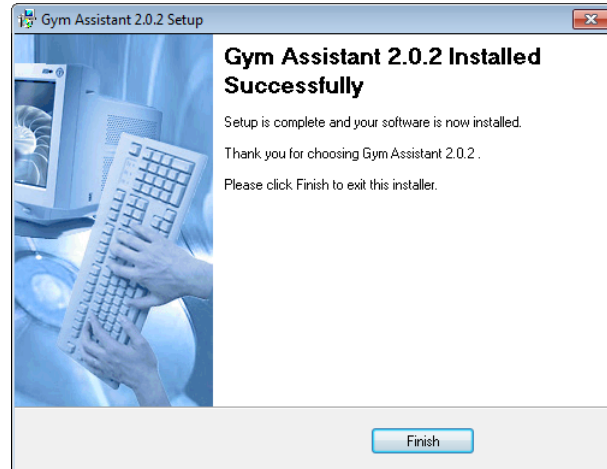
10. When the installer will ask if you want to launch Gym Assistant now, click **Yes**.

Adding Gym Assistant to the Start Menu

Windows 7

To add Gym Assistant to the Start menu, right-click on the Gym Assistant 2.0 icon and select **Pin to Start Menu**.

Windows 8

To add Gym Assistant to the Start window, right-click on the Gym Assistant 2.0 icon (on the Desktop) and select **Pin to Start**.

Starting Gym Assistant for the First Time

In Windows Vista / Windows 7:

1. Click the **Start** button.
2. Select **All Programs**.
3. Select **Gym Assistant 2.0** from the top of the **All Programs** menu.

In Windows 8:

1. Open **Desktop**.
2. Double-click the **Gym Assistant 2.0** icon on the Desktop.

Registering Your Software

1. The first time you run Gym Assistant the Software Registration window will appear.
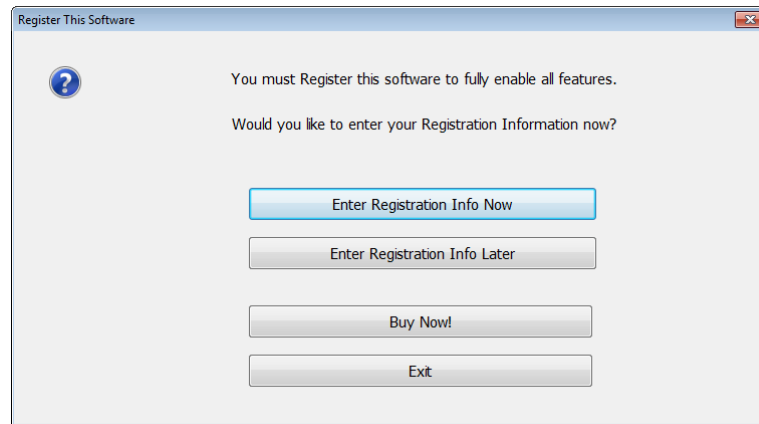
2. You should have received Registration Information from Bio-Logic (on a cover letter or by email).

   If you have the registration info on-hand, then click **Enter Registration Info Now** to enter the info now (go to the next step).

   If you click **Enter Registration Info Later**, then you can enter the registration info the next time you start Gym Assistant.

   > **Note**: You will only be able to add twenty new member records until you enter a valid registration code.

3. Enter the User Name, Serial Number and Registration Code that you received from Bio-Logic and then click **OK**.
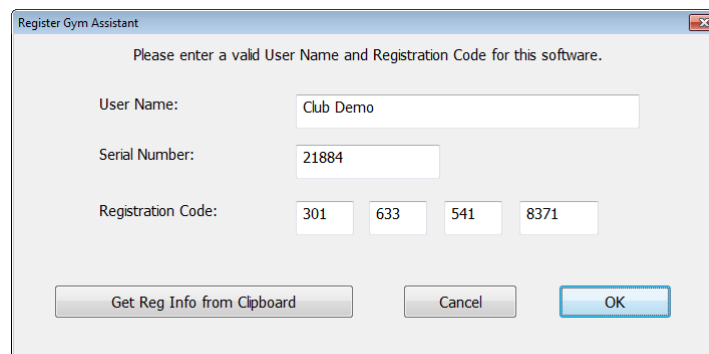
   > **Note**: Be sure to type the **User Name** exactly as it appears on your information sheet, including spaces and punctuation.

4. The Registration Info window then appears displaying your information.
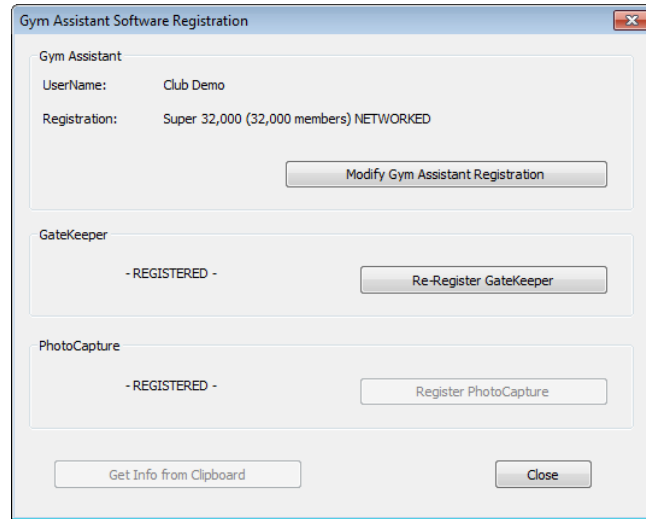
If you purchased GateKeeper, click **Register GateKeeper** and enter the GateKeeper registration code that you received.

If you purchased PhotoCapture, click **Register PhotoCapture** and enter the PhotoCapture registration code that you received.

5. Click **Close** to proceed.

6. The **Localization Setup** window now appears.
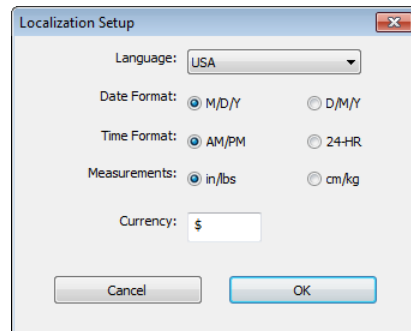
7. Select a **Language** and set options for **Date Format**, **Time Format**, **Measurements** and **Currency** or click **OK** to accept the defaults.

8. The **New Data** window now appears.
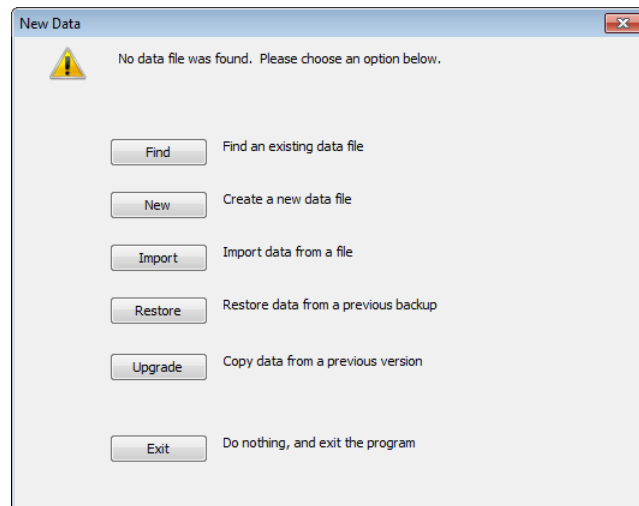
- Click **New** to create a new empty data file.

- Click **Import** to import a data file sent to you from Bio-Logic. This option is normally used if data was converted from another software system.

- Click **Restore** to restore data from a previous Gym Assistant backup. This option is normally used if you are moving Gym Assistant data from another computer (either Version 2.0 data or older Version 1.5 data).

- Click **Upgrade** if you want to copy data from a Gym Assistant 1.5 installation on this computer.

9. After creating a new data file or importing an existing data file, Gym Assistant will restart automatically.

Software Activation

The **Software Activation** window will appear the second time you start Gym Assistant. Software Activation is a way for Bio-Logic to protect against unauthorized copying of the software and to keep prices low for you, the customer. You must activation your software on this computer within 30 days of installation. After that time, some features will be disabled until you activate your software.
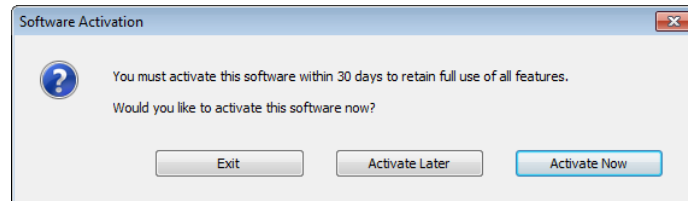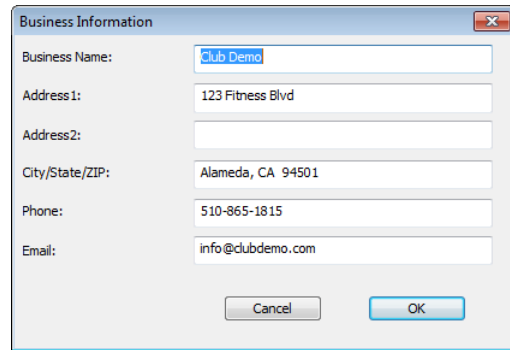
Software Activation requires that you obtain a unique Activation Code for the installation on your computer. You can obtain your activation code by several means:

- **Activate Now**: If you have an internet connection on your computer, then you can activate directly from within Gym Assistant.

- **Activate Later**: If you have access to the internet on another computer, then you can obtain your activation code from the Gym Assistant web site and then enter it into Gym Assistant at a later time.

> *Note*:   *If you do not have access to the internet, you can call Bio-Logic to obtain your activation code.*

Entering Business Information

The first time that you start the program, the Business Information window appears for you to enter basic business information.

After you have finished entering your information, press the **Enter** key (or click **OK**) to continue.

> *Note*: You can modify your Business Information later at any time by selecting **Business Information** from the **Settings** menu.

Entering Membership Plans

1. Enter the different membership types that your gym offers.

2. Define your club's "**price list**" with different membership options.

    Each membership type includes the following fields:

    - Name of the membership plan (for example "Standard" or "Student")
    - Initiation Fee (extra charge at signup in addition to first payment)
    - Contract length (in months)
    - Hours of entry (ALL hours or limited hours/days)
    - Payment Options (How often members make payments and how much they pay)

    Note: *You can modify your Membership Plans and all other Plan Types later at any time by selecting Membership Types from the Settings menu.*

3. Click **Add New Membership Plan** to add a new membership type.
4. The **New Membership Type** window will appear.

5. Type in a **Plan Name** for the new membership type, and then enter the **Initiation Fee** in dollars. This amount will be added to the first payment when the member first signs up.

6. Enter the **Contract Length**. If you do not require a contract, then enter zero.

7. Check the box and enter a payment amount for each payment option that you plan to offer.

> *Note*: *Manual Payment Options are collected individually from the member each month, whereas the **Recurring/Automatic Billing Options** will be collected automatically each month.*

8. A membership can have one or more payment options.

   In the "Standard" membership plan shown, members have the following payment options:

   - **Annual**: Member pays $600 for a full year
   - **Monthly**: Member pays $55 monthly by cash, check or charge
   - **Credit Card**: $50 charged monthly from a credit card
   - **ACH**: $50 debited monthly from a checking or savings account

9. After finishing the membership plan, press the Enter key or click **OK**.

10. The new membership type will then appear in the **Membership Types** window.

11. Add as many membership plans as you need (the software allows up to 128 different plans), then click **Done** to close the window.

12. For complete information about adding and modifying your Membership Types, please see **Membership Structure & Pricing**.

Chapter 2 - Basic Settings

It is important to configure some basic settings in Gym Assistant at the beginning before you get too involved in the overall setup of the software.

Automatic Updates

The Automatic Updates feature allows Gym Assistant to update itself automatically through the internet. We generally release a new build of the software every few weeks with bug fixes, enhancements and new features. An update will replace only the software application (.exe) files that affect function, and it will leave all of your data and documents untouched.

Select **Auto-Update** from the **Settings** menu.
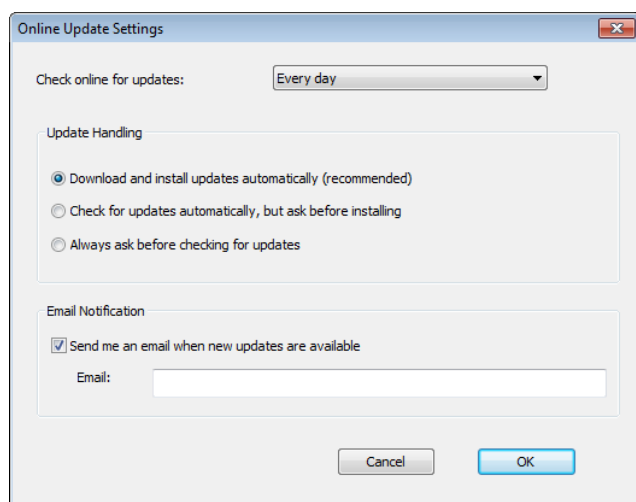
> ***Note***:   *If you do not have a live internet connection or you do not wish to take advantage of the Automatic Updates feature then just set **Check online for updates** to **Never** and click **OK**.*

Check online for updates

This setting determines how often Gym Assistant will check for updates:

- **Never** will basically disable the Automatic Updates feature. Select this option if you do not have a live internet connection or if your system will not allow Gym Assistant to connect directly to the internet.

- **Every Startup** will check every time you start Gym Assistant.

- **Every Day** will check only the first time you start Gym Assistant each day. This is the setting that we recommend.

- The other options (**Every 3 Days**, **Every 7 Days**, etc.) will check only after the specified time interval has passed.

Update Handling

This setting determines how Gym Assistant applies each update:

- **Download and install updates automatically** will always download an update if it is available. This is the recommended setting.

- **Check for updates automatically, but ask before installing** will download an update if it is available but you get to determine when the update is installed. Use this setting if you want to control when the update is installed, maybe to wait until you have done a global backup of the data.

- **Always ask before checking for updates** will ask you each time if you want to check for updates, and only download and install an update when you confirm that you wish to proceed with the update.

Email Notification

This setting specifies whether you want to receive an email when new releases are posted.

General Billing Options

Select General Billing Options from the Settings menu. Initially you should set only the basic options, then you can set the more advanced options after you have decided on your billing structure and logistics.

Pro-rate amount due at sign-up

Check this box to pro-rate the amount due at the beginning of a contract. For example, suppose a member signs up on the 20th of the month and you do your billing on the 1st day of each month.   Gym Assistant can automatically calculate how much the member should pay up-front to take them from the 20th until their first billing data on the 1st. If you specify that the member's first payment should be due later than 1 month from the signup date (e.g. the 1st of the following month), then Gym Assistant will calculate the additional amount she should pay to cover the time until that first payment.

> *Note:*   *This is a default setting. This setting can be overridden for specific membership plans (see "Membership Payment Options / Advanced Options") or manually when a member's contract is created (click* **Admin** *and check or uncheck the* **Pro-Rate** *box).*

Pro-rate amount due at contract end

Check this box to pro-rate the amount due at the end of a contract. For example, suppose a member contract ends on the 20th of the month and you do your billing on the 1st day of each month.   Gym Assistant will automatically calculate the member's last payment to take them from the 1st until her contract ends on the 20th.

> *Note:*   *This is a default setting. This setting can be overridden for specific membership plans (see "Membership Payment Options / Advanced Options") or manually when a member's last payment is taken (click* **Admin** *and check or uncheck the* **Pro-Rate** *box).*

Enforce Contracts

Check this box to require that all members have a valid contract. If you try to record a payment for a member after his contract end date then you will be given a choice to either renew the existing contract or create a new contract.
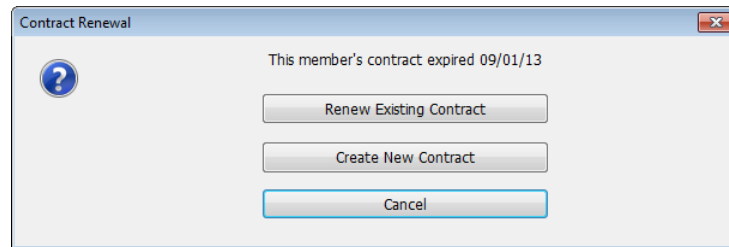
- If you choose **Renew Existing Contract** then the payment will be recorded and the member's Contract End Date will be advanced by the contract length for that member's current membership plan.

- If you choose **Create New Contract**, then you will be taken to the Start New Contract window for the member.

Sales Tax Rate

Set the Sales Tax Rate for your city or enter zero if you will not be charging sales tax.

- Check the **Charge Tax on Membership Fees** box if membership fees are taxed.

- Check the **Charge Tax on Contract Fees** box if initiation fees and other fee add-ons are taxed.

Automatic Billing Options

Min days to pay at sign-up

This setting determines the minimum number of days that a member should pay for at the beginning of a contract. This option only affects recurring billing (Credit Card and ACH) memberships, and it lets you control for how long the member must initially pay. This setting is most often used to ensure that members pay up-front for at least a minimum time or to ensure that you will have enough lead time before their first bill date.

For an example, suppose you process your recurring billing members on the 1st of each month. If a members signs up on the 25th then you could have him pay for 5 days up-front and then bill him on the 1st for the first full month. But if you want him to pay more up-front then you could have his first billing date on the 1st of the following month (so he pays for a little more than 1-month at signup).

Monthly processing days-of-month

This setting determines when you process your billing each month. The billing days should be separated by commas. For example, if you will be processing your billing on the 5th and 20th of each month then this field should be set to "5,20".

Other General Billing Options settings can be configured later, and you will find detailed information elsewhere in this document.

Chapter 3 - Membership Structure & Pricing

Membership Types Explained

Membership Plans

A **Membership Plan** is time-based. The member pays a defined amount for a given period of time. A membership plan has a **billing period** (for example, every month), and it can also have a **contract length**.

The Contract Length for a membership is optional. If you specify a contract length you can also determine what will happen at the end of the contract.

- If the contract length is simply a minimum commitment (billing will continue after the contract is fulfilled) then basically nothing will happen at the end of the contract.

- If billing should stop at the end of the contract then you can specify that the member's contract will be terminated at the end of the contract (unless they begin a new contract).

Punchcard Plans

A **Punchcard Plan** is based on visits, rather than time. A member with a Punchcard Plan can buy a package of entries into the club (visits). Each time the member checks in at the front desk one visit is automatically deducted from his total number of visit credits remaining. Member check-in usually happens when the member scans a barcode, but check-in can also be done manually by the front-desk staff.

Day-Pass Plans

A **Day-Pass Plan** requires that the member pays for each visit individually. For example, a Day-Pass Plan might be useful for a rock climbing gym where each member must have a signed waiver on-file. A Day-Pass plans can be used either members or non-members (walk-ins). A Day-Pass sold to a walk-in will record the visit and the revenue, but that visit will not be attached to any member (basically anonymous).

Membership Add-Ons

Monthly Add-Ons

A **Monthly Add-On** can only be added to a monthly membership. The amount of the add-on is simply added on to the member's regular monthly dues. For example, a club might charge $10 per month for locker rental. Those members with Locker Rental added to their memberships will have the $10 per month added to their regular monthly membership fees.

Punchcard Add-Ons

A **Punchcard Add-On** provides a way to sell packages of credits and then count down the number of credits left for that member as they are used. You can use Punchcard Add-Ons to sell aerobics classes, personal training sessions, tanning, equipment rentals or almost anything that would be tracked with a counter.

> *Note*: A **Punchcard Add-On** is different from a **Punchcard Membership Plan**. With a **Punchcard Membership Plan** one visit credit is deducted <u>automatically</u> every time the member enters the facility. **Punchcard Add-On** credits are not deducted automatically, but must be registered individually at the front-desk.

Working with Membership Types

- You must specify your pricing structure by creating a set of Membership Types.

- Every member will then be assigned to one of those types that you create.

- Think of your list of Membership Types as a "price list", as it will determine how often members pay, what method they use to pay and how much they pay.

- Any change that you make to one of your membership types will be applied to all members that are assigned that membership type.

  > *Note*: This lets you easily change your pricing structure without having to modify all your member records.

- You can define up to 128 membership types.

1. To edit your Membership Types select **Membership Plans** from the **Settings** menu.
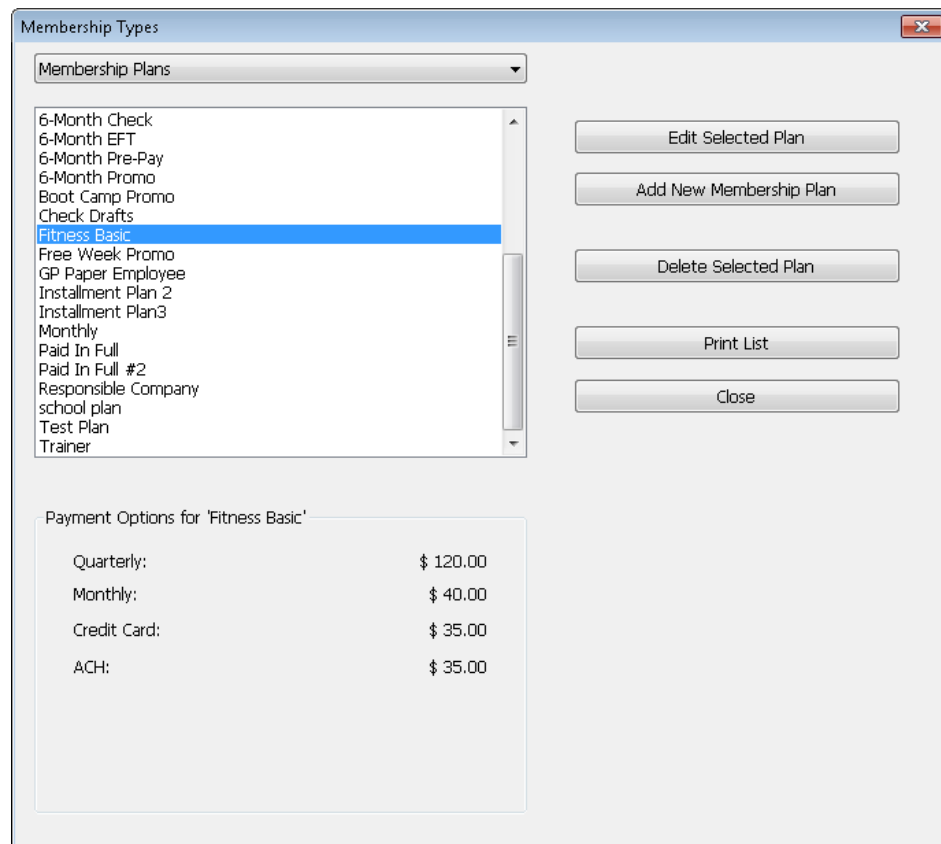
2. Click **Add New Membership Plan** to add a new membership plan.

3. (See "**Editing a Membership Plan**" below.)

4. If you click on a plan in the list the payment options for that plan will appear below the list.

5. To edit a membership plan select it in the list and click **Edit Selected Plan**. (See Editing a Membership Plan below.)

6. Click **Delete Selected Plan** to delete a plan from the list.

> *Note*: *You can not delete a membership plan if any members are attached to that plan.*

7. Click **Print List** to print a listing of all membership plans.

Editing a Membership Plan

General Plan Options

All member plan types (Membership, Punchcard and Day-Pass) contain some common fields which are grouped as **General Plan Options** in the Edit Membership Plan window.

- **Plan Name** is the name for this plan. The maximum length of the Plan Name is 32 characters.

- **Contract Length** is the length of the contract, in months. Set this field to zero if you do not use a contract for this plan.

- **Signup Fee** is the <u>default</u> fee that is charged at signup. This fee is in addition to the standard membership, and some clubs refer to this as an "**initiation**" fee. The default signup fee can be overridden at the time a member signs up, which is an easy way to offer some members a special deal when they sign up.

- **Terminate Billing** determines the <u>default</u> Terminate Billing value (Never, At Contract End Date, At Next Due Date) for any new members that are created using this plan. Remember, though, that you can always change the Terminate Billing value for individual members at any time.

<u>Example #1</u>: A month-to-month membership with no contract.

Set the Contract Length to zero and the Terminate Billing value to "Never."

<u>Example #2</u>: A month-to-month membership with minimum commitment of 6 months.

Set the Contract Length to 6 Months and the Terminate Billing value to "Never".

Example #3: A 2-week trial membership.
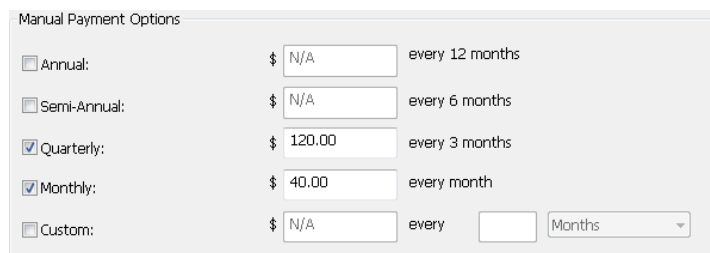
Set a payment period of 2 weeks and set Terminate Billing value to "At Due Date".

Membership Payment Options

Each Membership Plan can have up to seven different payment options with a different price for each option.

Manual Payment Options

Manual Payment Options are paid at regular intervals by cash, check or credit card. Either the member will pay you in-person or will mail in a payment. Each payment is processed individually.

1. To enable a manual payment option, check the box next to that option and set the price, which is the amount the member pays each billing period. (For example, a member with the Quarterly payment option shown above would pay $120 every 3 months.)

2. To set a custom billing period check the **Custom** box, then set the price and billing period for that option. (For example you might offer an option where the member pays every 2 weeks.)

Recurring/Automatic Billing Options

The Recurring/Automatic (**EFT – Electric Fund Transfer**) billing options are charged to the member's credit card or debited from the member's bank account (called **ACH – Automated Clearing House**) automatically each month.
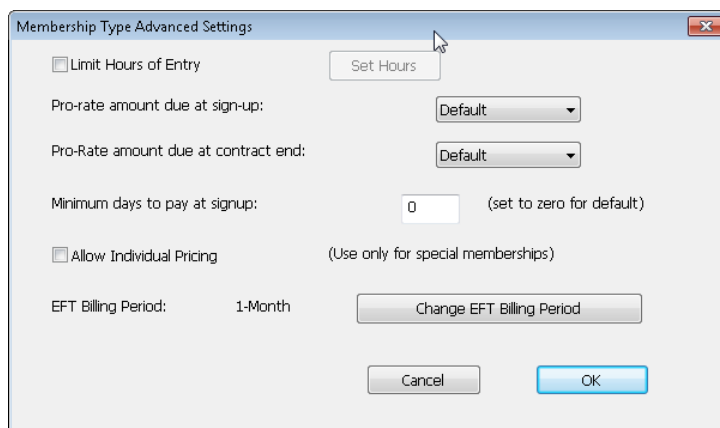
To enable the **Credit Card** or ACH billing option(s) check the box next to that option, then set the monthly price.

> *Note:* *You can set a custom Recurring (EFT) billing period for a membership plan by clicking **Advanced** (see below).*

Advanced Options

These settings are rarely used, but they can be very useful for special cases.
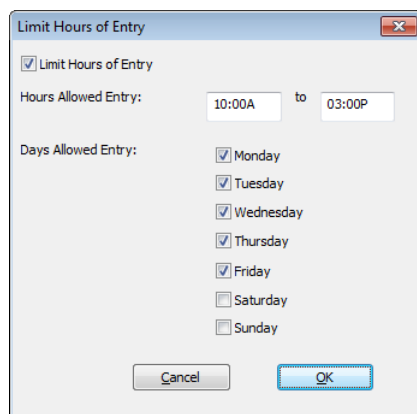
Limit Hours of Entry

1. Check this box to limit the hours during which members of this type can enter the club.

2. Check the Limit Hours of Entry box to set the allowed hours.

Pro-rate Amount Due at Sign-up

For each membership plan you can override the default for whether to pro-rate the amount due at sign-up. You have three choices:

- Default   Use whatever setting is specified in **General Billing Options**.

- No   Do not pro-rate for this membership plan.

- Yes   Always pro-rate for this membership plan.

Pro-Rate Amount Due at Contract End

For each membership plan you can override the default for whether to pro-rate the amount due at the end of a member's contract. You have three choices:

- Default   Use whatever setting is specified in **General Billing Options**.

- No   Do not pro-rate for this membership plan.

- Yes   Always pro-rate for this membership plan.

Minimum Days to Pay at Signup

For each membership plan you can override the default Minimum Days to Pay at Signup found in **General Billing Options**.

Allow Individual Pricing

Check this box to allow unique (variable) pricing to be set for each member of this membership type. By default, **Gym Assistant** always calculates the billing amount for each member from the pricing structure that you specify for all membership plans. If this option is turned on for a given membership plan, then pricing for members of that plan can be set for each member individually.

> *Note*: *Please see "**Individual / Variable Pricing**" for more information on variable pricing for membership plans.*

EFT Billing Period

1. For any given recurring billing plan you can change the billing period from the default of "monthly" to another value.

2. Click **Change EFT Billing Period**.
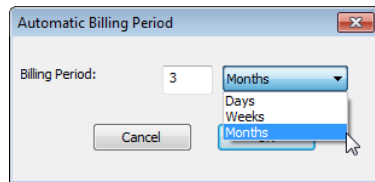
3. Set the billing period to any number of days, weeks or months then click **OK**.

> *Note*: *Changing the **EFT Billing Period** for a given membership plan will change the billing period for all recurring billing members with that plan.*

Punchcard Plan Payment Options

A **Punchcard Plan** is based on visits, rather than time.

1. A member with a **Punchcard Plan** will buy a package of entries into the club.

2. Each time the member checks in at the front desk (either by swiping a card or by checking in with staff) one visit is automatically deducted from his total number of visits remaining. When all the member's visits are used up, he is automatically denied entry.

3. The member can add more visits at any time by purchasing additional packages.

> *Note*:   A **Punchcard Plan** has the common **General Plan Options** and an additional price for a package of visits.

Day-Pass Plan Payment Options

A **Day-Pass Plan** requires that a member pay for each visit individually.

- A Day-Pass is the only type of plan that can be sold to **non-members** (without creating a membership record).

> *Note*:   A Day-Pass Plan has the common General Plan Options and then an added **price per visit**.

- If the **Allow sale to Non-Members** box is checked, then day-passes purchased under this plan will be considered "**walk-ins**" and these sales will not be associated with any member.

- If the **Allow sale to Non-Members** box is <u>not</u> checked, then day-passes of this type can only be purchased by active members.

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Chapter 4 - Member Info: Home Screen

Viewing Member Information

The vast majority of time in Gym Assistant will be spent in the **View Member Info** window. The View Member Info window displays all information about a member.

There are three main areas in the View Member Info window:

- The **Member Info** area displays the information for this member.
- The **Navigation** area provides controls to lookup members or move to the next/previous member.
- The **Member Actions** are provides direct actions on the currently displayed member.

Member Info Area

The following information is displayed in the top of the Member Info area:

- Member Number and name
- Membership Status
- **Green**:   Entry Allowed
- **Orange**:   Entry Allowed for New Member (joined within 30 days)
- **Red**:   Entry Denied, Delinquent or Alert
- **Black**:   Inactive, Terminated, Freeze
- Comment
- Alert (appears in red, and will deny entry for this member)
- Measurements

- Visits totals
- Member Photo
- The **Personal**, **Contract** and **Other** tabs display information about the member.

Member Personal Info

Personal	Contract	Other
Address:	91424 O Ofnlsl Sqk	
	Cntjx, Rk, 90996	
Phone:	405-537-4405	
Birth Date:	09/05/1994	Sex: M
Email:	Uikclhditlxswb@gymassistant.com	
Emergency:	Adyu Kfqwmi Hcflwv 094-500-7176	

Member Contract Info

Personal	Contract	Other

Billing Plan:	Gym Only	Due Date:	05/01/13	Signup Date:	03/05/13
Billing Option:	Monthly	Last Paid Date:	04/10/13	Contract Begin:	02/01/13
Billing Amount:	34.99	Last Paid Amount:	195.90	Contract End:	--/--/--
Billing Status:	ACTIVE	Current Balance:	0.00	Freeze Date:	--/--/--
Terminate Billing:	Never	Last Check-In: 03/05/13 03:27P		UnFreeze Date:	--/--/--
Membership Add-Ons: - none					
Linked Memberships: - none -					

Member Other Info

Personal	Contract	Other

Drivers License#:		
Referral:	Hsuy Xnmcbg	
Corporate:		
Staff Member:	Xtyzgpu Hauzhh	
Barcode Number: 0		Silver Sneakers ID:
Last TanTime:	00/00/00	

Member Actions Area

The Member Actions area of the View Member Info window contains buttons that can apply actions to the currently displayed member. These buttons provide a convenient shortcut to the most commonly-used member functions.

> ***Note****:   These buttons provide immediate convenience, but the complete set of available actions are always available from the menu bar. All actions that can be applied to the displayed member are found in the **Member** menu.*

The Member Actions buttons include the following functions:

Add Member	Adds a new member.
	To add a <u>dependent</u> member select **Add Dependent Member** from the **Member** menu.
Record a Payment	Record a manual payment.
Edit Member Record	Edit the member record directly.
Alert	Add/Edit the member Alert (which will deny entry).
Comment	Add/Edit the member Comment (which will not deny entry).
Picture	Add/Edit the member picture.
Barcode	Add/Edit the member barcode.
Notes	Add/Edit the notes for this member.
Measurements	Add/Edit/Review measurements for this member.
Add-Ons	Add/Edit member punchcard add-ons.
	Record usage of a member punchcard credit.

Navigation Area

The Navigation Area provides controls to lookup members and control the display of members.

Member # or Name View	Lookup a Member:
	Enter a member number, barcode number or part of a member's name (first and/or last name), then click **View**. (see "Member Lookup" below)
	Note: Viewing a member record will <u>not</u> record a check-in for that member. (For check-in you must click Check-In, go into Monitor Check-Ins window or scan the member's barcode.)
Clear Display	Clear the currently displayed member info
Prev/Next	Display the Previous/Next member.
	When browsing members this will display the previous/next member in the database (sorted by membership number).
	When viewing member info from a list, this will display the previous/next member in the list.
Monitor Check-Ins	Display a list of the last 100 member check-ins and allow you to manually check-in multiple members. (see "Monitor Check-Ins" below)

Member Lookup

<u>There are four ways to lookup a member record</u>: membership number, barcode, name and general search.

Lookup by Membership Number or Barcode

Enter a membership number or barcode number and click **View** (or press the Enter key).

> ***Note***: *Only one match should be found, or you will get the message "XXXX not found" if there is not a match.*

Lookup by Name

Enter part of the member's first and/or last name and click View (or press the ENTER key). A list of possible matches will be displayed.

> ***Note***: *The more of the name that you enter, the shorter the list from which to select. For example, if you are looking to find "Jon Doe" you could enter "Jon", "Doe", "J Do" or "J D", and all would match with "Jon Doe".*

General Search

General Search will look at all fields for a possible match, including Name.

1. Select F**ind a Member** from the **Member** menu, or press **Ctrl+F**.

2. Enter the text you want to find and click **OK** and a list of members with the text will be displayed.

Monitor Check-Ins

The Check-In Monitor window will dynamically display the last 100 members that have checked-in.

1. The most recent check-ins will display at the bottom of the list.

2. Double-click on an entry in the list to display that member's record.

3. To Check-In a member manually enter her membership number or part of her first and/or last name and hit Check-In (or press the Enter key).

   Note: *If you enter a name and there is more than one match for the text you entered then you will need to select from a list of possible matches.*

Chapter 5 - Member Administration

Adding New Members

- To add a new **Primary** member (not a dependent) click **Add New Member** on the main page or select **Add New Member** from the **Member** menu.

- To add a new **Dependent** member, first display the primary/responsible member record then select **Add Dependent Member** from the Member menu.

- **Gym Assistant** automatically selects a unique membership number (which should be #1 for the very first member).

  > *Note*: *Each new membership record must have a unique membership number. It is very important not to re-use old membership numbers.*

The **Gym Assistant** license that you purchased enables the software for a certain number of membership records. This limit is on the <u>number</u> of records, not the membership numbers themselves. For example, if you have a 500-member license and have deleted 100 member records from the database your membership numbers will go well over 500.

Personal Information.

If you are adding a dependent member then the address and emergency contact info will be filled out automatically.

> *Note*: *Only the First and Last name are required.*

Click **Next** to continue.

Contract Information.

1. Select a **Membership Plan**.

2. Specify a **Contract Begin Date** and **Contract End Date**.

    Note: *The Contract End Date field is filled automatically from the current membership plan.*

3. **Terminate Billing** specifies what should happen at the Contract End date or Payment Due Date. (See "Editing a Membership Plan" for details about member termination.) The value for this field is filled automatically from the selected membership plan. To modify the value you must first click **Admin**.

4. Select one of the **Billing Options** available for this membership plan (e.g. "Monthly").

    Note: *The Billing Option shows <u>only</u> billing options available for the selected membership plan.*
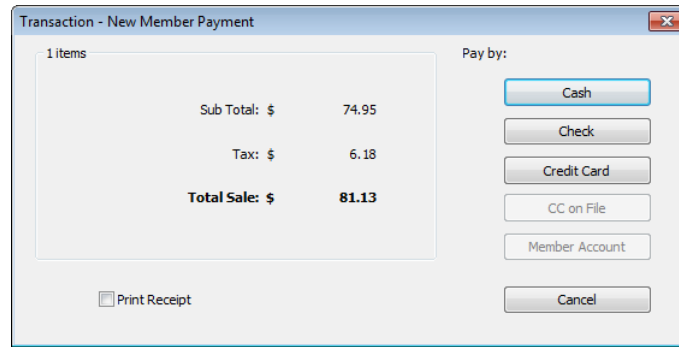
    Note: *The Recurring Billing Amount field automatically fills with the correct value for the selected membership plan and billing option.*

5. Specify the due date of the first payment by clicking on the small arrow to the right of the **Next Payment Due Date** field or by simply typing in a new date.

    Note: *The options available in the Next Payment Due field will change depending on the billing option selected.*

    Note: *For recurring billing options (Credit Card and ACH) the Next Payment Due date is automatically set to the first available billing date as specified in Settings/General Billing options.*

6. **Membership Fee** is automatically calculated from the Billing Option and Next Payment Due Date selected. To override the calculated value click **Admin.**

7. Press the **Enter** key or click **Next** to continue.
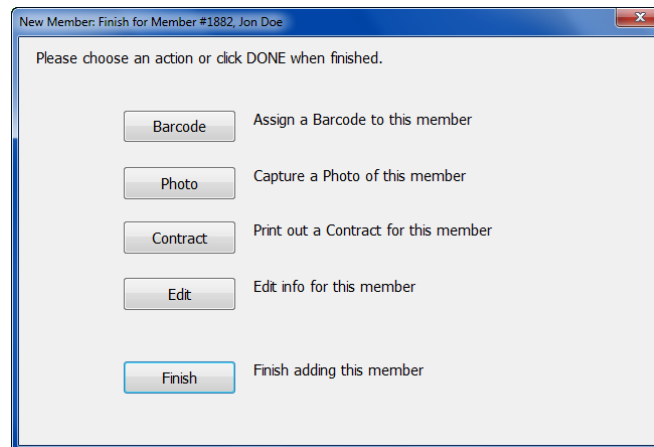
8. Select a payment method to indicate how the member is paying today for startup fees.

> **Note**:   This does _not_ indicate how the member will be making future or recurring payments, only how they are paying at sign up.

9. After finishing the initial member setup, there will be a few options for the new member to add if necessary.
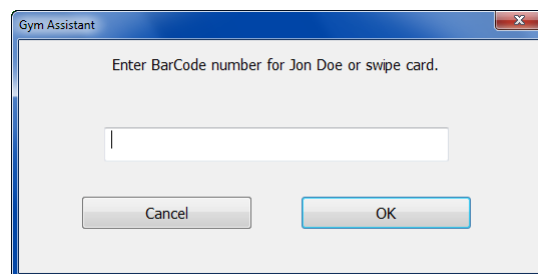
Finishing Information

The **New Member Finish** window will appear.

1. Click **Barcode** to enter a barcode number for the member.

You can either type in the member's barcode number or scan a barcode, then click **OK** (or press the **ENTER** key).

2. Click **Photo** to capture a photo of the member. See **"Photo Capture"** below for more information.

3. Click **Contract** to print a contract for the member.

4. Click **Edit** to go back and manually edit the member's information.

Recording a Membership Payment

While viewing a member's record you can manually record a membership payment by clicking **Record a Payment**.

The "**Member Payment**" window will appear with the member's current contract info appearing at the top of the window.

- **Billing Periods** specifies the number of billing periods that the member will be paying.

  Note: *The default is one period (e.g. one month), but if the member is delinquent then Gym Assistant will display the number of months required to bring that member up-to-date.*

- **Membership Fees** automatically calculates the fees due (from your pricing structure) when you change the number of billing periods for this payment.

  Note: *To override the Membership Fees click **Admin**.*

- **Dependent Membership Fees** displays any fees due for any dependent members.

  Note: *To view or modify the payment details for dependent members click **View Dependents**.*

- **Other Fees** can be added on at the time a payment is made.

  Note: *Use this field to add any amount for this payment only.*

- **Sales Tax** is calculated automatically from Membership Fees and Other Fees. (See "Settings/General Billing Options" to set sales tax rates.)
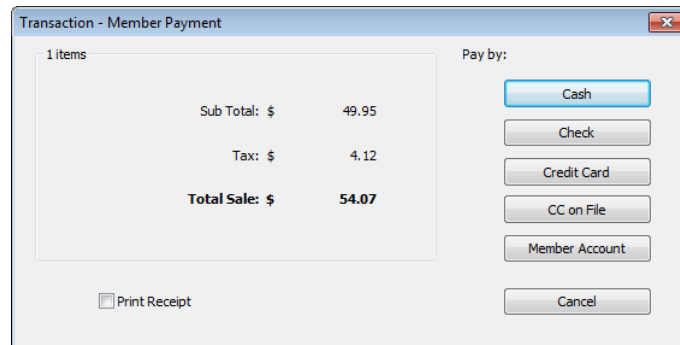
- **Payment on Current Balance** lets you specify how much the member will be paying on his current membership balance.
    - If the member has a balance owed then the full amount will appear by default.
    - If the member has a credit on account then an "**Apply Credit**" button will appear, click this button to apply all or part of the credit to this payment.
    - To modify the balance paid click **Admin**.
- **Total Payment Due** will be calculated automatically.
- **Next Payment Due** displays when the members next payment will be due. This value is automatically updated when you change the number of billing periods for this payment. To modify the "**Next Payment Due**" click **Admin**.
- **To Pro-Rate a payment** (calculate the amount due from the monthly billing amount and due date) **Admin** then check the **Pro-Rate** checkbox.
- Enter the end date for the payment period into **Next Payment Due**, then click **Calculate**. The appropriate member fees will be calculated automatically.
- Click **Admin** to enable Membership Fees, Payment on Current Balance, Next Payment Due Date and Pro-Rate items.

    > *Note*:   *After clicking **Admin** you may be required to enter a password for Member Admin, depending on how you have setup passwords and user permissions.*

- Click **Modify Contract** to change the member's contract. The new contract parameters that you select will be reflected when you come back to this Member Payment window.

Click **Record Payment** to continue with this transaction and take payment from the member.

Completing a Transaction with Cash, Check, or Charge

The **Transaction - Member Payment** window will appear.
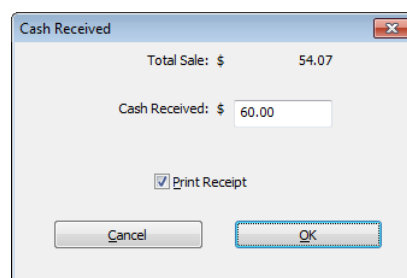
There are five possible methods to collect money for any transaction:

- Cash
- Check
- Credit Card (with card presented by the customer)
- Credit Card on File
- Charge to Member Account

Please see below for details on each method.

Cash Remittance
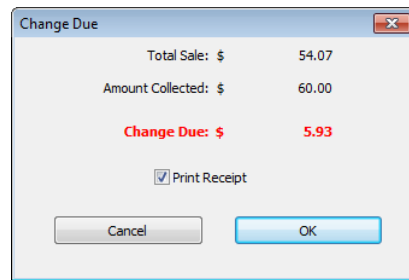
1. In the Transaction window click **Cash** (or press the 'A' key) to accept a cash payment.

2. Enter the cash received (you don't need to include the decimal or cents) and click **OK** or press the **Enter** key.

3. Check the **Print Receipt** checkbox if you need a receipt.

   Gym Assistant will display the **Change Due** window and you get one more chance to print a receipt.
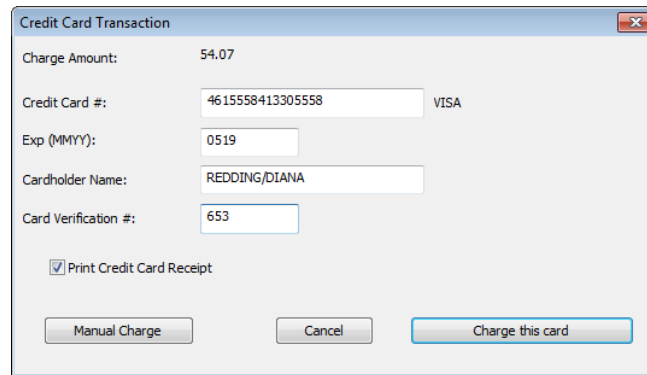
4. Just click **OK** to close the **Change Due** window.

Check Remittance

1. In the Transaction window click **Check** (or press the 'H' key.

2. Enter the check number (optional).

Charging a Credit Card with Card Present

1. In the Transaction window click **Credit Card** (or press the 'R' key).

2. If you have a USB credit card reader swipe the card through the reader or just enter the credit card information.

3. Click **Charge This Card** or press the **Enter** key to complete the transaction.

> *Note:* *If you will submit this charge outside of Gym Assistant (e.g. through a standard desktop retail credit card terminal) then click **Manual Charge**. You will then be asked if the charge was approved or declined. Be careful, though … clicking **Manual Charge** will record the payment, but it will not submit the charge for you.*

Charging a Credit Card on File

1. Click **CC on File** (or press the '**C**' key) to charge the credit card on file for this member.

> *Note:* *This button is only enabled if the currently displayed member has his billing option set to "**Credit Card**."*

2. Click **Yes** to confirm that you want to charge the members card on file.
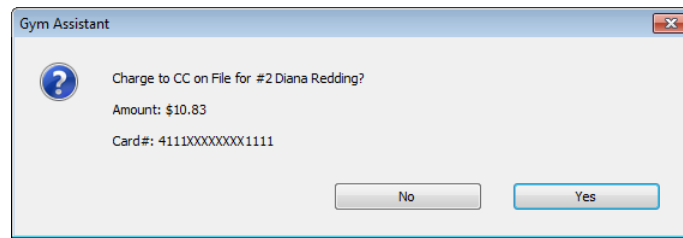
3. After submitting the charge Gym Assistant will report if the charge was successful.
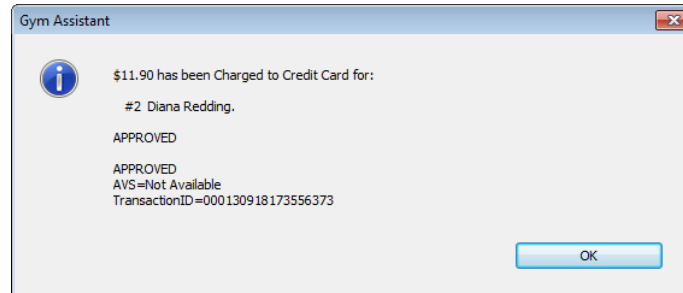
Applying Charge to Member Account

Gym Assistant can allow a member to charge purchases or membership fees to her member account (basically to "run a tab"), which will add a given amount to the member's Account Balance. When the member makes her next membership payment her account balance will automatically be added to the membership fees collected, and the balance will be cleared.

1. Click **Member Account** (or press the '**M**' key) to charge this transaction to the Member account for this member.

> *Note:* *The **Member Account** button is only enabled if the currently displayed member has a Billing Status of **Active**.*

2. Click Yes to confirm the charge to the member's account.
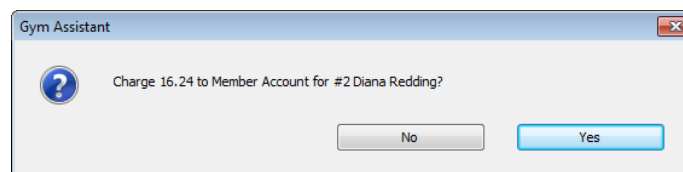
3. Gym Assistant will report the member's new account balance.
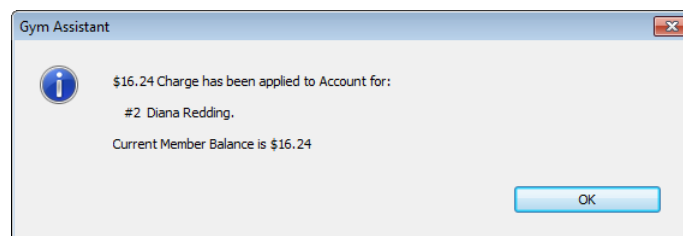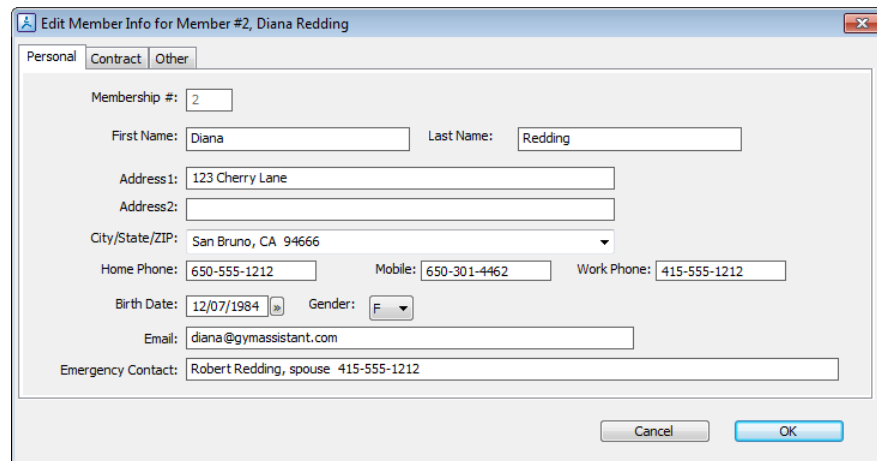
Edit Member Record

You can directly edit all of the fields in the member record directly, but we strongly recommend that you use other functions when making changes to a member's contract (recording payments, starting new contracts, inactivating/reactivating members). Editing a member's record directly may sometimes seem convenient, but it will not leave a useful audit trail for statistics and business reporting.

To edit a member's record directly click **Edit Member Record** or select **Edit Member Record** from the **Member menu**.

Personal Info Tab

> **Note:** You can not change a member's **Membership #** from this window To change a membership # you must select Special Features from the Utilities menu, then select "**Change Membership #**" from the list.

Gym Assistant can maintain a pre-filled list of often-used **City/State/Zip** entries.

- Select from the prefilled list by clicking on the downward triangle to the right of the **City/State/Zip** field.

- To add the current value to the prefilled list, click on the triangle and select "**Add Current Entry to List**."

- To edit the prefilled **City** list select "**Prefilled Lists**" from the Settings menu.

Contract Info Tab

Notice that all of the Contract fields are disabled by default. To enable editing for the contract fields click **Admin** and enter a user login with **Member Admin** privileges.

To change the **Billing Plan** for a member click **Change**. The Contract Info window will appear.

Change the **Plan Type** to display Membership, Punchcard or Day-Pass plans.

> **Note:** The **Billing/Payment Options** list will change to display only the Billing Options available for the selected plan. The Recurring Billing Amount will display the amount for the selected plan and billing/payment option.

To edit your club-wide pricing structure, click **Edit Plans**. Note that *this will change your pricing structure for all members, not just the current member.*

Other Info Tab

The **Other** tab contains all other member fields.

Comment	The Comment field displays prominently when viewing a member's record. (See "Prefilled Lists" below.)
Alert	The Alert field displays prominently when viewing a member's record. (See "Prefilled Lists" below.)

> *Note: Any Alert will deny entry for that member.*

Barcode #	Enter the member's barcode # or click **Set Bar Code** and then scan the barcode with the barcode reader.
Last Tan Time	For those clubs utilizing GateKeeper to control access into a tanning room, this field shows the last time the member recorded a tanning session. Click **Clear Last Tan** to reset this value.
Silver Sneakers ID	Enter a member's Silver Sneakers ID in this field.
Fingerprint	For those clubs utilizing a fingerprint scanner to control access, this field will show if the current member has a fingerprint on file. Click **Register New** to register a new fingerprint for this member. Click **Delete** to delete the current member's fingerprint on file.
Custom Fields	You can use the four Custom fields to store any information for your members. To rename the fields select **Custom Fields** from the **Settings** menu. (See "Prefilled Lists" below.)

Family/Dependent Members
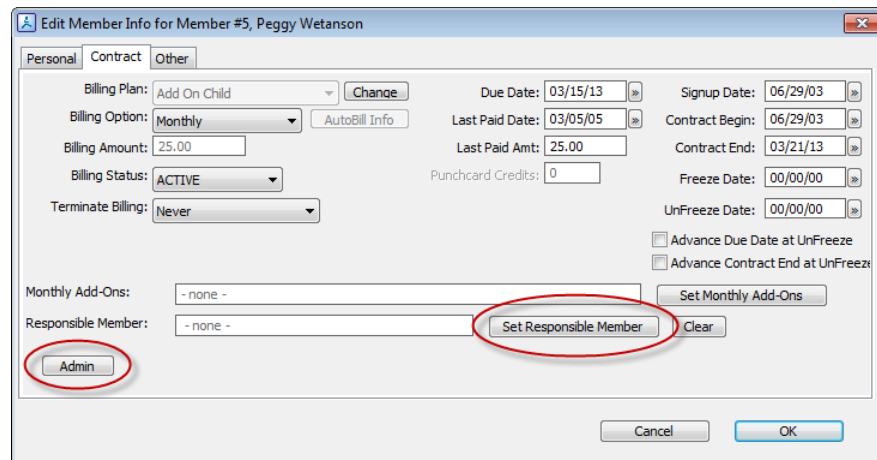
You can link members for billing purposes. One family member is designated as the "primary" (or "responsible") member, and the other family members are designated as "dependents" of the primary member. For example, a family may have Dad, Mom and 2 kids.

Gym Assistant can handle family memberships in two ways: with a <u>fixed price</u> for the entire family (e.g. $70/month for up to 4 family members) or with <u>added fees</u> for each dependent (e.g. $40/month for first family member and $20/month for additional family members). With either method every family member will have a membership record in the database so that you can track revenue and usage for each individual.
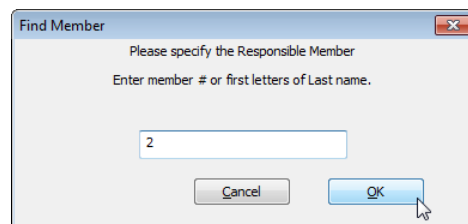
> ***Note***: *All family members must have the same Due Date and Billing Period (monthly, annual, etc.) (though not necessarily the same Billing Option.*

Making an Existing Member Dependent on Another Member ("Linking")

1. Display the member who will dependent.

2. Click **Edit Member Record**.

3. Click **Admin** to enable the contract fields.

4. Click **Set Responsible**" Member.

5. Enter the membership number or name of the primary member who will be responsible for payment and click **OK**.

6. Confirm by clicking **Yes**.
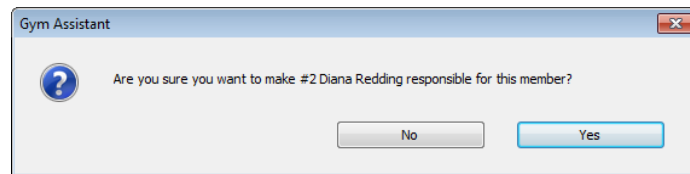
7. The **Responsible Member** should now be displayed.

8. Make sure that the dependent member's billing period (Monthly, Annual, etc.) is the same as the responsible member. Dependent members should not have a billing option of Credit Card or ACH, as these will only apply to the responsible member.

Unlinking a Dependent Member

1. Display the dependent member.

2. Click **Edit Member Record**.

3. Click **Admin** to enable the contract fields.

4. Click **Clear** next to the **Set Responsible Member** button.

5. The **Responsible Member** should now be empty.

Member Financial Information

Gym Assistant only stores financial information for members with a recurring billing option of **ACH** or **Credit Card**.

Updating Member Credit Card Information

There are three ways to access a member's credit card info:

- While viewing a member's record right-click on the Credit Card billing option. The cursor will change to a hand when you are over the clickable area if the member has a billing option of Credit Card or ACH.
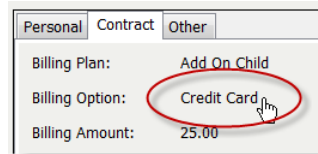
- While viewing a member's record select **Update Financial Info** from the **Member** menu.
- While editing a member's record click **CC Info**.
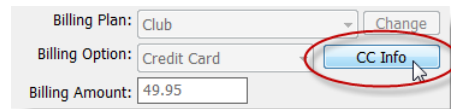
The member's current card information will be displayed (with part of the credit card number masked for security reasons).
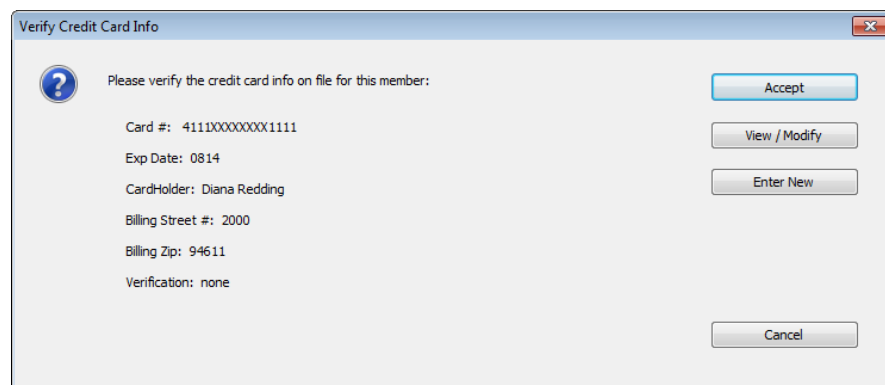
- Click **Accept** to keep the current card info.
- Click **View/Modify** to edit the current card info (e.g. to update the card expiration date).
- Click **Enter New** to enter information for a new credit card.

To enter a new credit number:

- Enter the credit card number (without spaces or dashes) into the Card # field.

- **If you have a USB credit card reader** slide the card through the reader (with the cursor in the Card # field). The **Card #**, **Exp Date** and **Cardholder Name** fields will populate automatically.

> *Note*: *Always fill the **CC Billing Street #** and **CC Billing Zip** fields to ensure that your credit charges incur the lowest processing fees from your merchant services provider.*

- Click **Print Authorization** to print an authorization form for your members to sign.

> *Note*: *Most clubs will include such authorization in the membership contract, so this may not be needed. (You can edit the "**CC-Auth.txt**" form selecting **Edit Form Template** from the **Documents** menu.)*

Tokenizing Card Information for Maximum Security

If you are utilizing one of the available integrated credit card processors (Merchant Warehouse, IP Pay or JetPay) then you have the option of transferring the member's sensitive cardholder information to the merchant processor. This process is called "tokenizing", because the processor will return to Gym Assistant a "token" that can be used to represent the member's card number. Because the sensitive card information does not reside on your computer this presents the easiest way to confirm that your business is PCI compliant.

> *Note:* *For more information about PCI (Personal Cardholder Information) regulations and compliance please refer to your merchant processor.*

To tokenize a member's credit card information click **Tokenize**. Gym Assistant will send the card information to the processor and then display "Verified+Tokenized" under the card number.

Updating Member ACH (bank) Information

There are three ways to access a member's ACH info:

- While viewing a member's record right-click on the ACH billing option. The cursor will change to a hand when you are over the clickable area if the member has a billing option of Credit Card or ACH.
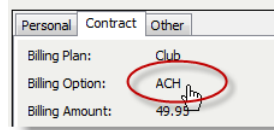
- While viewing a member's record select **Update Financial Info** from the **Member** menu.

- While editing a member's record click **ACH Info**.
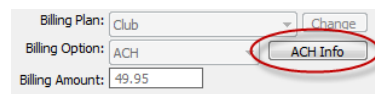
The member's bank information will be displayed (with most of the bank numbers masked for security reasons).
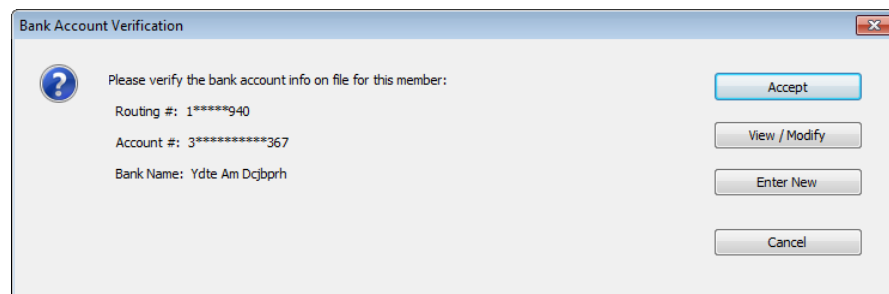
- Click **Accept** to keep the current bank info.
- Click **View/Modify** to edit the current bank info.
- Click **Enter New** to enter information for a new bank account.

Tokenizing ACH Information for Maximum Security

If you are utilizing one of the available integrated ACH processors (IP Pay or JetPay) then you have the option of transferring the member's sensitive bank information to the processor. This process is called "tokenizing", because the processor will return to Gym Assistant a "token" that can be used to represent the member's bank information. Because the sensitive bank information does not reside on your computer this presents the easiest way to confirm that your member's financial information is secure.

To tokenize a member's bank information click **Tokenize**. Gym Assistant will send the bank account information to the processor and then display "Verified+Tokenized" under the card number.

Punchcard Add-Ons

A **Membership Add-On** is anything that can be paid for separate from the regular membership. Some common examples of member add-ons would be personal training sessions, aerobics classes and tanning sessions.

Punchcard Add-ons are very different than **Punchcard Plans**. With a **Punchcard Plan**, one visit is deducted every time the member walks into the club. With a **Membership Add-On**, a credit is deducted only when the member uses one of her pre-purchased add-on credits.

Setting up Punchcard Add-Ons

To setup your Punchcard Add-Ons price list select **Punchcard Add-Ons** from the **Settings** menu.
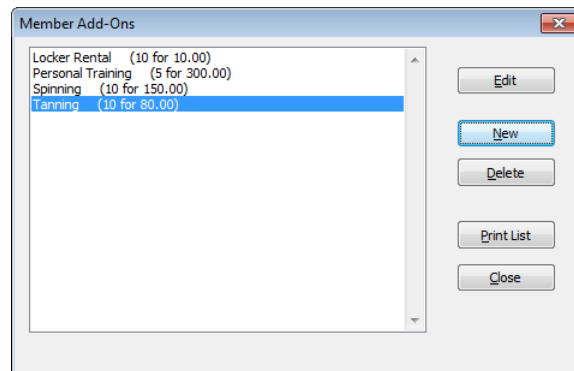
Click **New** to create a new punchcard add-on or click **Edit** to edit an existing add-on.
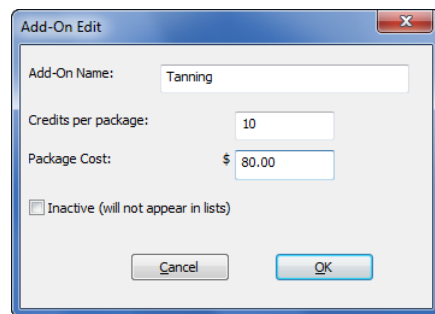
1. Enter a **Name** for the add-on (e.g. "Tanning", "Personal Training", "Spinning", etc.).

2. Enter the number of **Credits per Package**.

3. Enter the **Cost** for each package.

4. Check **Inactive** only if you do not want this add-on to appear in selection lists (e.g. if this option has been discontinued).

5. Click OK to finish.

Purchasing a New Punchcard

6. While viewing a member record click the **Add-Ons** button.
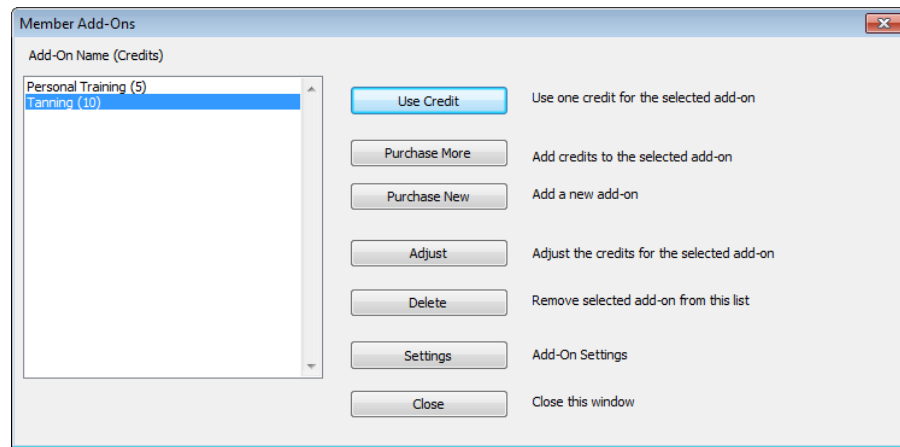
7. Click **Purchase New**.
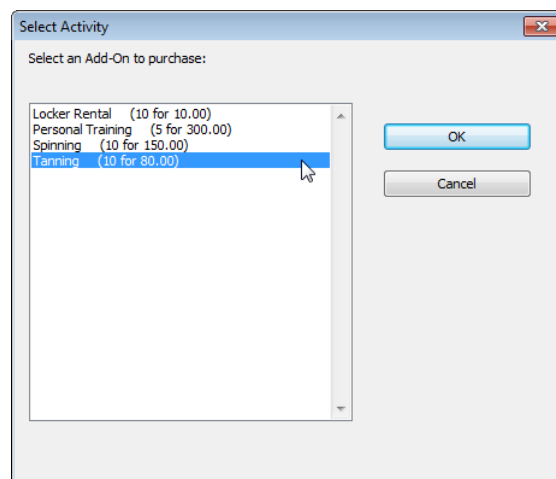
8. Select which add-on to purchase, then click **OK**.

Purchasing Additional Credits for an Existing Punchcard

1. While viewing a member record click the **Add-Ons** button.
2. Select the Add-On for which to add credits and click **Purchase More**.

Recording Usage of Punchcard Credits

Punchcard credit usage must be recorded by staff at the front desk.

1. While viewing a member record click the **Add-Ons** button.
2. Select the Add-On for which to record a credit used and click **Use Credit**.
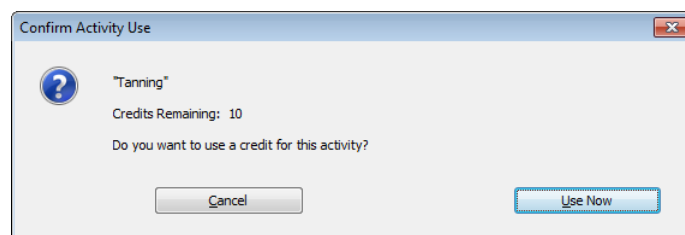
3. Click **Use Now**.

4. The number remaining credits for the member's punchcard will be displayed.
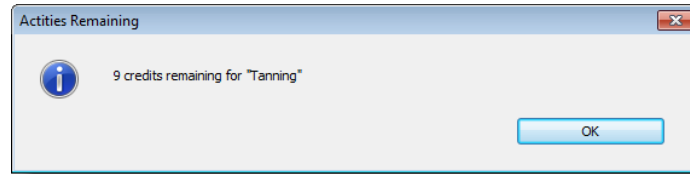
Other Member Punchcard Functions
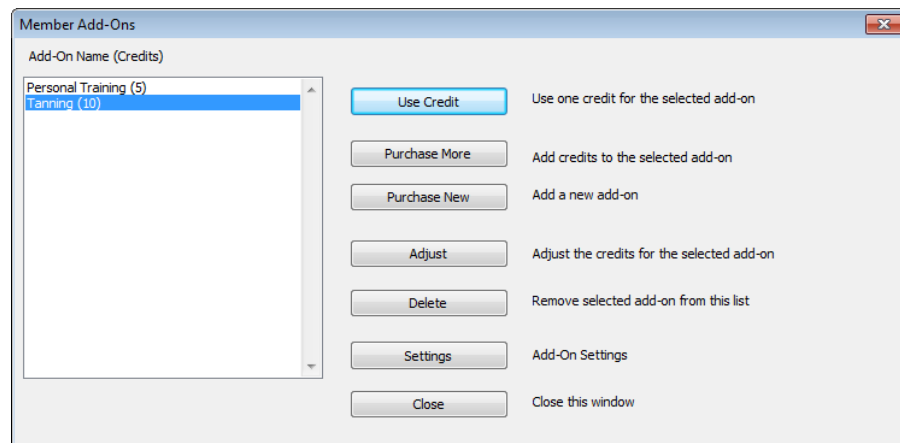
Click **Adjust** to adjust the number of credits remaining for the selected Punchcard.

Click **Delete** to remove the selected punchcard for this member. A punchcard can only be deleted for a member if there are no credits remaining on that punchcard.

Click **Settings** to edit the Punchcard Add-On price list for the club.

Comments

A comment will appear prominently when displaying the member's information.

Note that a member comment is limited to one line, so it is only appropriate to display short blurb. The member comment is only for display

To enter a member comment while viewing a member's record click **Comment** or select **Comment** from the **Member** menu.

The Entire Comment window has a pre-filled list on the right so you can choose from often-used comments. (See "Pre-Filled Lists" elsewhere in this document.)

Alerts

An alert will stop a member from entry into the club. Alerts are generally more critical situations where the member needs to talk to someone at the front desk.

To enter a member alert while viewing a member's record click **Alert** or select **Alert** from the **Member** menu.

The Enter Alert window has a pre-filled list on the right so you can choose from often-used alerts. (See "Pre-Filled Lists" elsewhere in this document.)

Member Notes

Member Notes provide an unlimited capacity to keep free-form notes for each member. Notes are time/date stamped automatically to provide an accurate chronological record.

To view the notes for a member while viewing his record click **Notes** or select **Notes** from the **Member** menu.
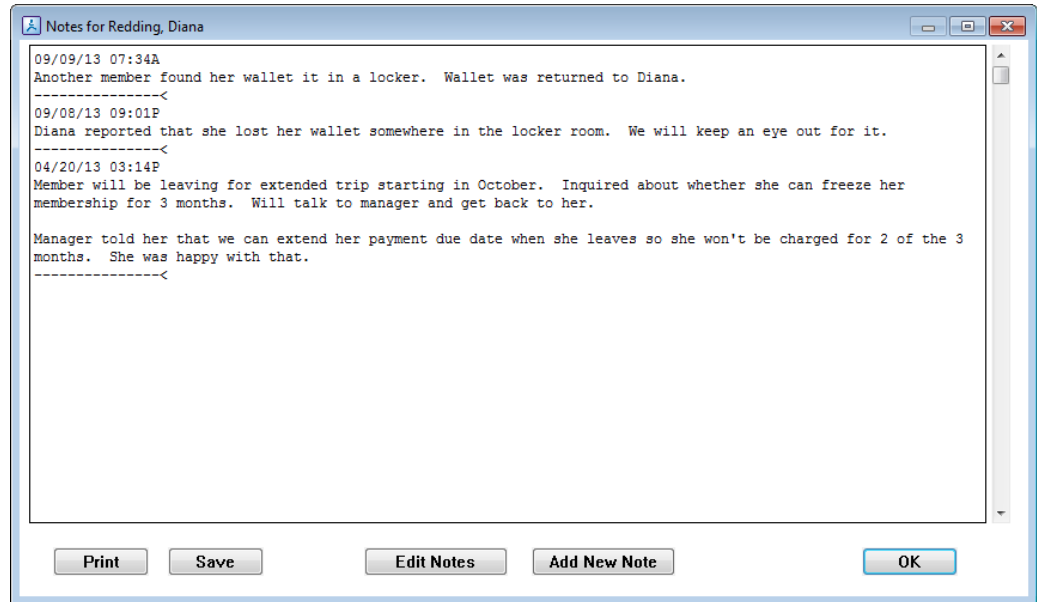
To add a new time-stamped note for this member, click **Add New Note**.

To edit the existing notes click **Edit Notes**.

Individual / Variable Pricing

Gym Assistant is designed around a structured pricing scheme, which gives you greater control over your membership types as a whole. You can change the pricing for a given membership plan, and that price change will be applied to every member of that plan type. In some cases, however, you may want to set pricing for individual members. Examples might include long-time members that were offered special pricing in the past or new members for which you want to offer a special deal.

Individual pricing allows you to have a different price for every member (maximum flexibility), but you lose the convenience of higher-level control.
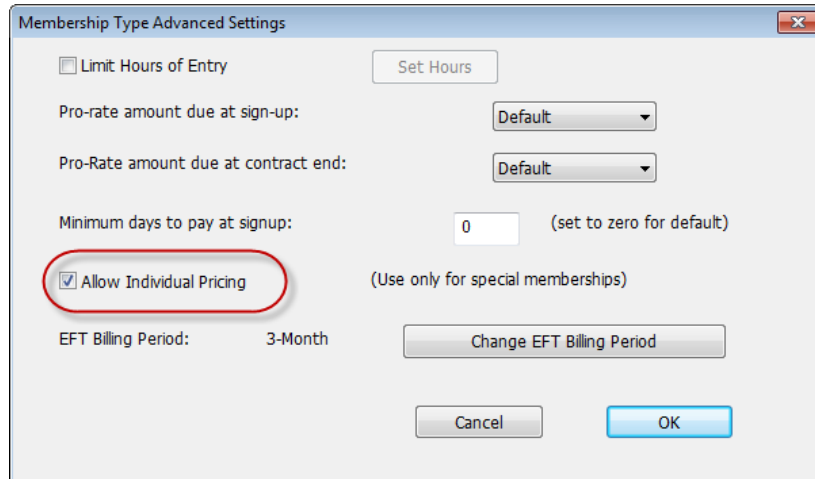
> ***Note***: *You can always offer a one-time deal to a member at the time you collect money from a member. For example when you sign up a new member, or when you take a manual payment. Just click* **Admin** *and set the price for this payment. This will not change the recurring billing amount for the member, just for the current transaction.*

Individual pricing must be enabled for any membership plan for which you want to it available. You must then turn on individual pricing for each member that will have a special billing amount (rather than the default billing amount for the membership plan).

> *Note*:   *We recommend that you create a special membership plan for special memberships (maybe called "Special") and turn on Individual pricing only for that plan.*

Turning on Individual Pricing for a Membership Plan

1.   In the Edit Membership Plan window click **Advanced**.

2.   Check the box for "Allow Individual Pricing," then click **OK**.
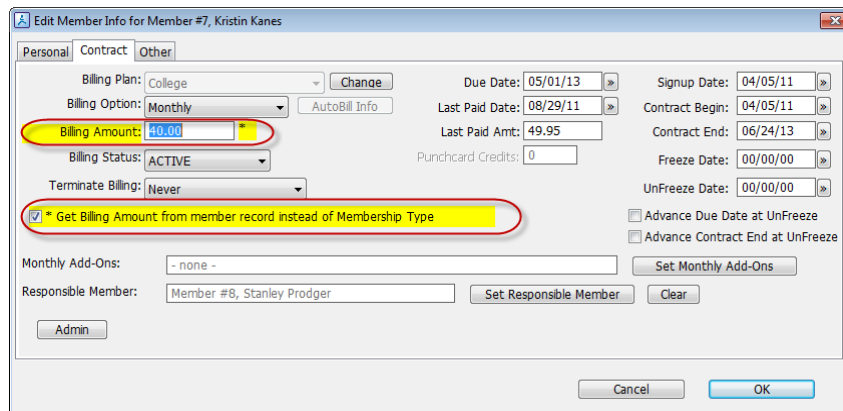
Turning on Individual Pricing for a Member

1.   In the View Member Info window click **Edit Member Record**.

2.   In the Edit Member Info window click **Admin** to enable all available controls.

> *Note*:   *The Billing Amount field is not enabled (as it is not for other membership plans).*

3.   Check the box "Get Billing Amount from member record instead of Membership Type".

4.   The checkbox and Billing Amount fields will highlight in yellow to indicate that pricing for this member will not be set from the membership plan.

5. The Billing Amount field is now enabled and the recurring billing amount for this member can be set to any value.

6. Click OK to save the values for this member.

7. The View Member Info window will now display a (v) next to the member's Billing Amount. The "v" stands for "variable).

8. In member reports the member's Billing Amount will also display a "v" to indicate that this member's billing amount is Variable.

Freezing/Unfreezing Members

Gym Assistant can automatically freeze and unfreeze members. A member who is "**frozen**" will not be billed while frozen, and they will not be allowed entry into the club. An example of freezing a member would be someone who will be on vacation during the month of July. You set the date on which the freeze will start (7/1) and restart (8/1).

1. Set the Freeze Date and Unfreeze Date.

2. Check the box Advance Due Date at UnFreeze if you want to credit the member for the time of the freeze (if they won't be expected to pay for that time period).

3. Check the box Advance Contract End Date at UnFreeze if want to extend the member's contract by the length of the freeze.

4. Enter a Reason for the Freeze to add a note to the member's Journal history when the freeze is activated.

Handling the End of a Membership

A member will be denied entry to the club if any of the following is true:

- Payment is due (the member's due date has been reached).

- Member has a Alert.

- Member's Billing Status is set to anything other than "Active".

The Terminate Billing flag specifies a trigger to stop billing a member:

- If a member does not have a contract (month-to-month or paid-in-full membership) then **Terminate Billing** should be set to **Never**.

- If the member has a contract but the contract length is basically a minimum commitment then **Terminate Billing** should also be set to **Never**.

- If a member's billing will end at the end the contract (e.g. they must sign a new contract after 12 months) then **Terminate Billing** should be set to **At Contract End**.

- If the member will be terminating before the end of his contract or he has no contract and has decided to drop his membership, then **Terminate Billing** should be set to **At Due Date**. At the member's **Due Date**, his **Billing Status** will be changed to "**Terminated**" and he will no longer be billed or allowed entry.

Looking Up a Member

You can look up a member by **name**, **membership / barcode number**, or **search**.

Lookup by Name

Enter part of the member's first and/or last name, then click **View** (or press the **ENTER** key). If your entry is not a unique match then a list of possible matches will appear for you to choose.
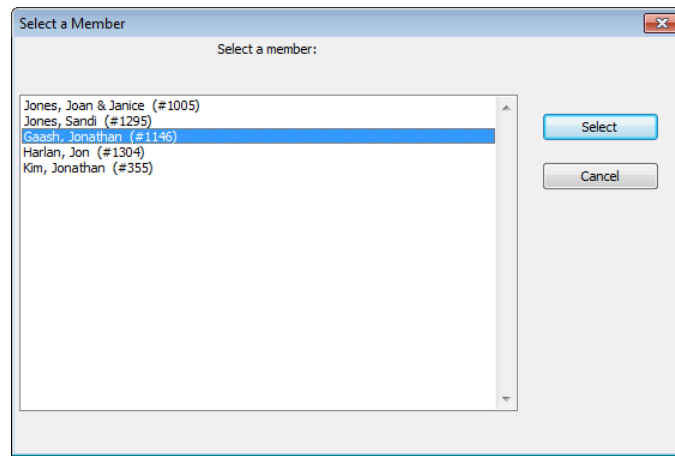
Note: *Enter part of a member's first and last name (separated by a space) to get a better match.*

Lookup by Number

Enter a membership number or barcode number to directly lookup a member.

Lookup by Text Search

Select **Find a Member** from the **Member** menu (or press **Ctrl+F**) to search all member fields for a member. Gym Assistant will search all member fields for a possible match and display a list of members that contain the search text.
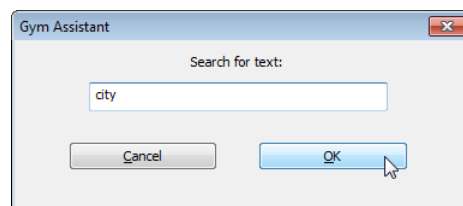
GateKeeper: Member Check-In

Member visits are recorded automatically through GateKeeper when a member scans a barcode. These visits are recorded regardless of what window is active in Gym Assistant, and even if Gym Assistant is not the active window.

When a barcode is scanned you should hear two sounds: first the scanner emits a high-pitched beep to indicate that it successfully received the scan, then GateKeeper emits a "ping" or "buzz" to indicated an allowed or denied entry.

You can manually check in a member from the **View Member Info** window in Gym Assistant. Just enter the member's name or number to display the member, then click **Record Visit**.

Chapter 6 - Billing: Credit Cards

The degree to which you can integrate credit card processing into **Gym Assistant** depends on your current setup and what changes you are willing to make. The most seamless method lets you process cards directly in the software, which allows you to process all of your monthly billing in only a few minutes each month.

Credit Card Processing Method Options

Fully-Integrated Processing: The Direct Method

This is by far the most efficient way to handle credit cards in **Gym Assistant**. **Gym Assistant** directly submits charges to the processor in real-time through the Internet.

When a member hands you his credit card at the time of purchase, you can swipe the credit card through a USB credit card reader (available in our Online Store). **Gym Assistant** then submits the charge and obtains approval in about two seconds. If you don't have a credit card reader, then you can manually enter the credit card information.

For monthly billing, **Gym Assistant** will generate a list of all members that should be charged for a given billing date. The program will then submit all of the charges in one step, recording the payments and updating records for all members whose charges were approved. After running all of the charges **Gym Assistant** will display a list of the declined and approved charges. If a member's card is declined then their payment will not be recorded and they will automatically be denied entry. You can run charges again for the declined members at any time later.

For more information about companies that offer integration with **Gym Assistant** please call us or check out our website at **www.gymassistant.com**.

Fully-Integrated Processing: Using PC-Charge

For those clubs who already accept credit cards and do not want to change processors, PC-Charge/Pro is 3rd party software that is compatible with almost any merchant processor. When coupled with a USB credit card reader (available in our Online Store), PC-Charge Pro can replace a standard retail credit card terminal. Transactions are submitted through the internet, so you will not need a dedicated phone line for processing credit cards.

Using this method, **Gym Assistant** can submit charges through PC-Charge/Pro in real-time exactly like the **Fully-Integrated Processing: The Direct Method**. The only difference is that **Gym Assistant** submits charges through PC-Charge, rather than directly through the internet.

You may be able to obtain PC-Charge directly from your merchant processor. Once PC-Charge has been configured and you have run a test charge directly we can walk you through the **Gym Assistant** setup in about 5 minutes. **Gym Assistant** is compatible with both **PC-Charge** "**Pro**" and **PC-Charge** "**Payment Server**."

> ***Note:*** *One current limitation of PC-Charge is that, as of this printing, PC-Charge is not supported on any Home edition of Windows*

or any 64-bit edition of Windows. Please confirm that your computer is compatible with PC-Charge before purchasing their software.

Manual Submission: The Low-Tech Method

For those clubs who already have a standard desktop retail credit card machine and want to keep their current processor, Gym Assistant provides some tools to make your life easier as well.

Retail Credit Card Terminal

When a member hands you his card at the time of purchase, just indicate in **Gym Assistant** that he will be paying by credit card. The software will then ask if the charge was approved. Swipe the card through your desktop terminal and run the charge as you normally would. Once the charge is approved (or declined) return to **Gym Assistant** and click "**Approved**" or "**Declined**."

For monthly billing, **Gym Assistant** will generate a list of all members that should be charged for a given billing date. The program will then display a list of credit card numbers, expiration dates and amounts to charge. You can use this list to manually run each charge through your credit card terminal. Once you have finished with the list, **Gym Assistant** can record all of the approved charges and update those member records in one step.

External Processing

If you are processing credit cards completely outside of **Gym Assistant** (maybe through an online service) then **Gym Assistant** still provides some tools to make your life easier.

- For swiped/manual transactions, simply tell **Gym Assistant** that the charge was approved.

- For monthly billing, **Gym Assistant** will generate a list of all members that should be charged for a given billing date. You can then record all of the approved charges and update those member records in one step.

Batch Export

Some merchant processors offer an online website that allows you to upload a batch of transactions in a text file. After the charges have been processed, a list of approved and declined charges is usually displayed. **Gym Assistant** can generate many different export formats including customizing options. You can then record all of the approved charges and update those member records in one step.

Please don't hesitate to call or email us if you have any questions about payment processing. We want to help you find the solution that is right for your business.

General Credit Card Settings

1. To setup credit card processing, select **Credit Card Processing** from the **Settings** menu.

2. Set the **Processing Method** to indicate how you will be processing your credit cards. You will find further details about each processing method below.

3. Check **Require Tokenization** to require that all stored credit card number is tokenized. Checking this box will ensure the highest level of security for your members' credit card information. (See "Tokenizing Card Information for Maximum Security" elsewhere in this document for more information about tokenizing credit card info.)

4. Check **Process 'Card Present' transactions externally** if you will not be processing manual credit card charges through Gym Assistant (e.g. if you have a desktop credit card terminal).

5. Specify the **Number of credit card receipts to print**.

6. Under **Credit Cards Accepted** enter the abbreviation for credit card types that are accepted.

Specific Process Method Settings

You can find detailed up-to-date instructions for your specific processing method at:

http://www.gymassistant.com/support/documents/index.php#billing

> *Note*: *If you are running **Gym Assistant** in a Networked environment, then the settings for each **Card Processing** method must be configured <u>ON EACH</u> workstation <u>individually</u>.*

Integrated – Merchant Warehouse

Select this method if you will be interfacing directly with the Merchant Warehouse Internet gateway. (See the "**Configuring for Merchant Warehouse**" section below for additional settings)

Integrated – IP Pay

Select this method if you will be interfacing directly with the **IP Pay** internet gateway. (See the "**Configuring for IP Pay**" section below for additional settings)

Integrated – JetPay

Select this method if you will be interfacing directly with the **JetPay** internet gateway. (See the "**Configuring for JetPay**" section below for additional settings)

Integrated – PC Charge Pro

Select this method if you will be interfacing directly with **PC Charge** software. (See the "**Configuring for PC Charge**" section below for additional settings)

APS

Select this method if you will be sending batch files to **APS**.

Manual Entry

Select this method if you will be entering credit card numbers manually on a retail terminal.

CC-External

Select this method if you will be setting up automatic recurring charges (independent of **Gym Assistant**) through your bank or credit card processor.

Authorize.net Export

Select this method if you will be exporting batch files for uploading to the **Authorize.net** web service.

ICVerify Import

Select this method if you will be exporting batch files into **ICVerify** software.
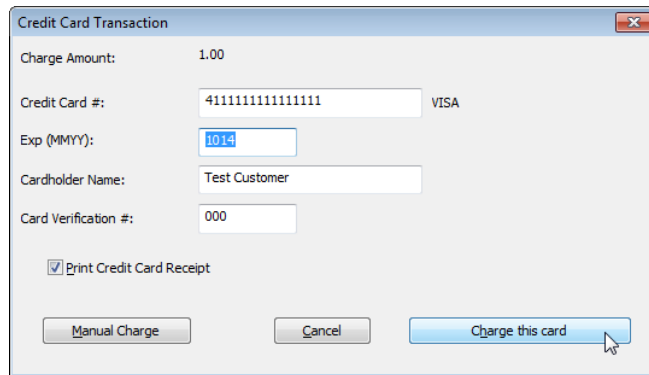
Custom Export

Select this method if you will be exporting custom-format batch files for uploading to your merchant processor.

Running a Test Credit Card Transaction

If you are using one of the integrated processing methods, then we recommend that you run a test transaction using a real credit card to confirm that the system is working properly.

1. Select Special Features from the Utilities menu.

2. Select Run CC Charge from the list and click **OK**.

3. Enter an amount for the transaction and click **OK**.

4. Enter your credit card information or swipe your credit card through a USB credit card reader if you have one.

5. Enter the security code from your credit card (for **VISA/MC/Discover** this is the last 3 digits on the back of the card, for **AmEx** this is the 4 digits in the top right on the front of the card).

6. Click the **OK** to process the transaction.

Processing Credit Card Members

Process Summary

1. Select members to charge: A list is created of members due on or before the billing date.

2. Clean up invalid card info: Any members with invalid credit card info can be fixed.

3. Process the payments: Member credit cards are charged.

4. Record payments: All payments are recorded in Gym Assistant.

Selecting Members to Charge

1. Select **Process Credit Card Members** from the **Billing** menu.

2. Billing Date determines what members will be billed. Only members due on or before the Billing Date will be billed.

    - Select a "**Billing Date**" from the drop down menu.

    - Type in a "**Billing Date**."

    - Click the calendar ⧉ button to specify a "**Billing Date**."

    Note: *Only members who are due on or before the "**Billing Date**" will be included in the billing list.*

3. **Maximum Aging** allows you to filter out members who are delinquent by more than a few months.

    For example, you might not want to bill members who are more than 3 months past due.

    If you specify a Maximum Aging of 90 days then members who are due more than 90 days <u>before</u> the Billing Date will <u>not</u> be included in the list.

4. **Include all members with Account Balance Due** allows you to include any member with a balance due even if that member does not have a membership payment due.

    For example, a club might allow members to charge retail purchases to their member accounts for later payment. They could run the billing weekly to collect for the retail balances owed.

5. Click the **OK** to continue.

6. The **Credit Card Billing** window shows a list of all members-to-be-billed with all members selected.

Each responsible member is displayed with the following information:

- The billing amount for responsible member

- The balance owed for responsible member

- Total amount due for all dependents

For example, if the amount shown is (2x28/43.00+28.00) then the responsible members owes membership fees of $28 each for 2 months, a previous $43 balance owed, and $28 for his dependents.

7. Hold down the CTRL key while clicking on a member in the list to select or unselect that member.

> *Note*: *The total number of members in the list and total amount billed appears at the bottom of the window.*

8. Click the **OK** to continue.

Cleaning Up Invalid Credit Card Info

The **Credit Card Cleanup** window shows the number of members with invalid or expired credit cards.
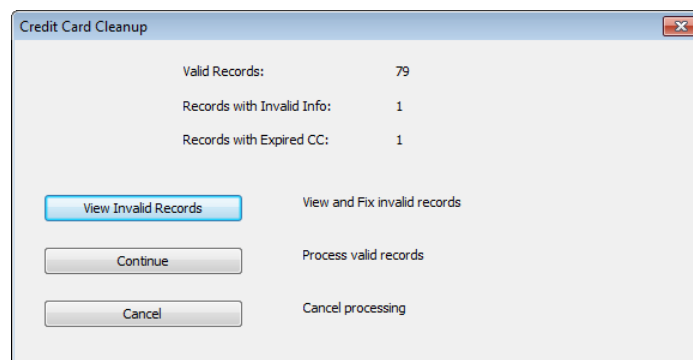
1. Click **View Invalid Records** to see the list of invalid records and make any corrections.
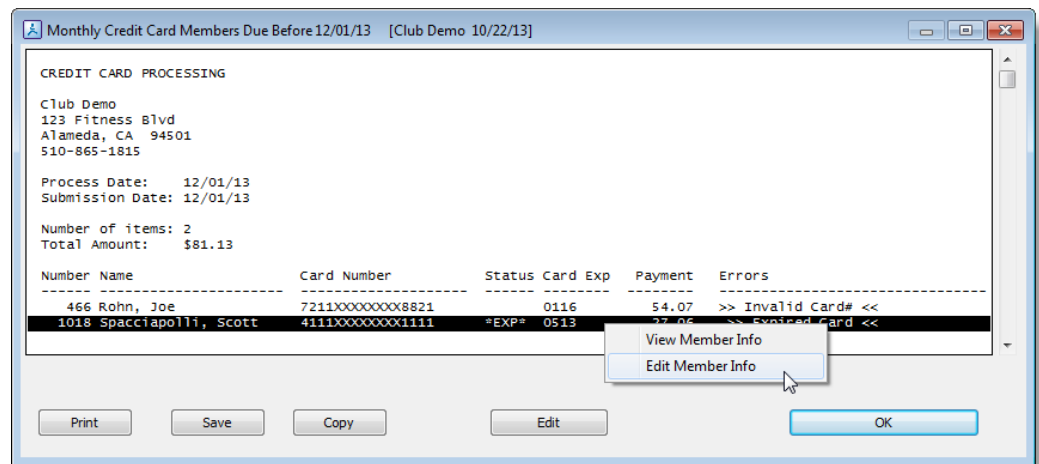
```
Monthly Credit Card Members Due Before 12/01/13    [Club Demo 10/22/13]

CREDIT CARD PROCESSING

Club Demo
123 Fitness Blvd
Alameda, CA  94501
510-865-1815

Process Date:    12/01/13
Submission Date: 12/01/13

Number of items: 2
Total Amount:    $81.13

Number Name                    Card Number          Status Card Exp  Payment   Errors
------ ---------------------   -------------------  ------ --------  --------  -----------------------------
   466 Rohn, Joe               7211XXXXXXXX8821            0116         54.07  >> Invalid Card# <<
  1018 Spacciapolli, Scott     4111XXXXXXXX1111     *EXP*  0513         27.06  >> Expired Card <<
                                                                     View Member Info
                                                                     Edit Member Info
```

Print   Save   Copy   Edit   OK

2. **Right-Click** on any member in the list and select **Edit Member Info** to view and change that member's financial info.

3. After reviewing and correcting any invalid card info, click **OK** to return to the **Credit Card Cleanup** window.

4. Click **Continue** to proceed to the next step.

>   *Note*:   *Any members with invalid payment info will not be included in the next billing step.*

Processing the Payments
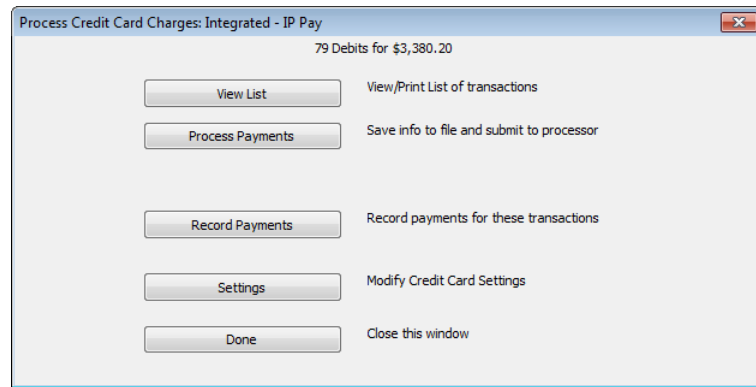
The Process Credit Card Charges – window title shows the currently selected processing method (which is in this case "**Integrated – IP Pay**").

- **View List** – displays a list of the charges that will be processed. Note that the full credit card information does not appear in this report for cardholder security.

- **Process Payments** – will process the charges using the currently selected processing method.

    Note: *If you are using one of the integrated payment processing methods then the member payments will be recorded automatically as the charges are processed. (See details for each processing method below.)*

- **Record Payments** – will record all of the payments for this batch. If you are using one of the integrated payment processing methods then you will not need this step, as the payments will be recorded automatically as the charges are processed.

- **Settings** – allows you to change the currently selected processing method and configuration.

Processing the Payments - Integrated Methods

The information in this section pertains to the following Processing Methods:

- Integrated - Merchant Warehouse

- Integrated - IP Pay

- Integrated - JetPay

- Integrated - PCCharge

- Integrated - GoToBilling

1. Click **Process Payments**.

2. Gym Assistant will now automatically process each charge in the batch.

3. Click the **Cancel** at any time to stop the batch.

```
Progress

Processing #29 of 79 payments...
#544  Michael Montano
Declined: 4
Approved: 24 for $1108.61

Elapsed Time: 0:14 sec
Remaining Time: 0:25 sec

Last Results: APPROVED

[████████░░░░░░░░░░░░░░░░░]

                        Cancel
```
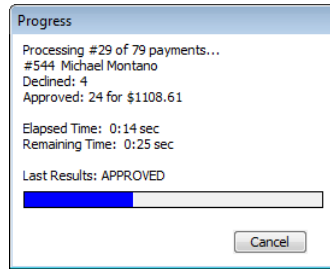
Note: Clicking the **Cancel** will <u>NOT</u> affect any charges that have already been processed, and it will not cancel the charge currently in-process. It <u>WILL</u> stop from processing the next charge in the batch. After clicking **Cancel** you <u>can</u> resume charging the batch, and members already charged will not be charged a second time.

4. After the batch is finished a report will be displayed showing a summary of all charges in the batch.

```
Process Credit Cards Report                                        [ _ ][ □ ][ X ]

Credit Card Batch Report       10/22/13 09:53P
Submitted Through:  Integrated - Test

   12 charges approved for        513.79
    0 charges declined for          0.00

APPROVED CHARGES
    2  Selleck, Sandi     4111XXXXXXXX1111     54.07  APPROVED|AVS=
    6  Borders, Helen     4111XXXXXXXX1111     27.06  APPROVED|AVS=
   50  Bishop, Orlee      4111XXXXXXXX1111     27.06  APPROVED|AVS=
   96  Miller, Betsy      4111XXXXXXXX1111     27.06  APPROVED|AVS=
   97  Ming, Jacquelyn    4111XXXXXXXX1111     54.07  APPROVED|AVS=
  139  Greenfield, Rich   4111XXXXXXXX1111     54.07  APPROVED|AVS=
  147  Shapiro, Jerry     4111XXXXXXXX1111     27.06  APPROVED|AVS=
  160  Sexton, Louisa     4111XXXXXXXX1111     54.07  APPROVED|AVS=
  232  McIntosh, Kim      4111XXXXXXXX1111     54.07  APPROVED|AVS=
  235  Holland, Julie     4111XXXXXXXX1111     54.07  APPROVED|AVS=
  244  Blaustein, Brian   4111XXXXXXXX1111     54.07  APPROVED|AVS=
  276  Parks, Jules       4111XXXXXXXX1111     27.06  APPROVED|AVS=

   [ Print ]   [ Save ]   [ Copy ]                      [     OK     ]
```

Chapter 7 - Billing: ACH

The degree to which you can integrate ACH (Automatic Clearing House) / EFT (Electronic Fund Transfer) processing into Gym Assistant depends on your bank and what changes you are willing to make. The most seamless methods let you submit ACH/EFT transactions directly in the software. Unlike credit cards, the money from ACH transactions does not get transferred to your account immediately. ACH/EFT transactions usually take from 2-5 days for the money to transfer or for the transaction to be rejected (usually for non-sufficient funds, or NSF).

For monthly billing, Gym Assistant will generate a list of all members that should be charged for a given billing date. The program will then submit the ACH batch (the list of specific bank transactions) in one step, recording the payments and updating records for all members whose charges were approved.

All banks handle the back-end logistics of ACH transactions; after all, this is how all money is moved between banks and between accounts in the first place. Many banks, however, DO NOT handle the front-end logistics of receiving ACH batches from customers.

ACH Processing Method Options

Fully-Integrated Processing: The Direct Method

This is by far the most efficient way to handle **ACH** in **Gym Assistant** is to sign up with a 3rd party **ACH** processor that offers full compatibility with **Gym Assistant**. The **ACH** processor's primary function is to submit **ACH** transactions into the banking system on your behalf.

Gym Assistant submits **ACH** transactions directly to the processor through the internet. The processor will check the information that is sent for invalid data and give you confirmation that the information was received.

You can then record all of the payments and update the members' information in one step. You will receive an email from the processor within 2-4 days notifying you of any rejected transactions. You can then easily reverse the payments for those members in **Gym Assistant**; in the meantime, they will be denied entry until their membership is paid either in person or by another **ACH** transaction.

NACHA File Export

Your bank may provide a website that allows you to upload ACH batches. The standard format for **ACH** batch files is called "**NACHA**" (National Automated Clearing House Association). **Gym Assistant** will generate an industry-standard **NACHA** file that you can send to your bank. The program will also record all of the payments and update all of the member records in one step.

Manual Submission: The low-tech method

For those clubs who already have a standard countertop retail credit card machine and don't want to change **Gym Assistant** provides some tools to make your life easier as well.

When a member hands you his card at the time of purchase just indicate in **Gym Assistant** that he will be paying by credit card. The software will then ask if the charge was approved. Swipe the card through your desktop terminal and run the charge as you normally would. Once the charge is approved (or declined) return to **Gym Assistant** and click "**Approved**" or "**Declined**."

For monthly billing **Gym Assistant** will generate a list of all members that should be charged for a given billing date. The program will then display a list of credit card numbers, expiration dates and amounts to charge. You can use this list to manually run each charge through your credit card terminal. Once you have finished with the list **Gym Assistant** can record all of the approved charges and update those member records in one step.

External Processing

Some banks provide tools for you to setup recurring **ACH** transactions. With a recurring transaction you tell the bank how much to deduct from the member's account on a given day each month, when to start and when to stop. With **Gym Assistant**, you can easily record all of the payments that will occur on a given billing date.

One significant disadvantage of utilizing a recurring bank debit is that you need to maintain duplicate system -- you must make sure to keep the bank list of transactions synchronized with the membership list in **Gym Assistant**. If you have a lot of members this process can easily get out of control, so we recommend the **Direct** or **NACHA** methods whenever possible.

Setting-Up ACH Processing

1. Select ACH Processing from the Settings menu.

2. Select the Processing Method that you will be using:

    - Check Assist (also known as "Quick Pay")
    - JetPay
    - EFT External
    - EFT-NACHA
    - EFT-MCA
    - EFT-MoneyMovers
    - EFT-Canada

3. Click Settings once you have selected a processing method to change settings specific to that method (see below for more information about each processing method).

4. Under "Deposit Info" enter the information for your business bank account (the account into which funds will be deposited).

5. Check the "Check for valid Routing Numbers" box if you want Gym Assistant to automatically validate routing (ABA) numbers as they are entered.

NACHA-Based Processing Methods: NACHA, MCA, MoneyMovers

These processing methods all use the **NACHA** file format, which is a U.S. banking industry standard format for transmitting bank funds electronically.

Obtain the following information from your bank:

Immediate Origin

Name: Usually your bank name

Origin: Usually a space character followed by your bank's routing number

Immediate Destination

Name: Processor Name

RTN: Processor Routing #

Company

Name: Usually your business name

ID: Usually "1" + Your Federal Tax ID or other # designated by your processor

Entry Description:
          Should be "Member Fee" or other string less than 10 characters
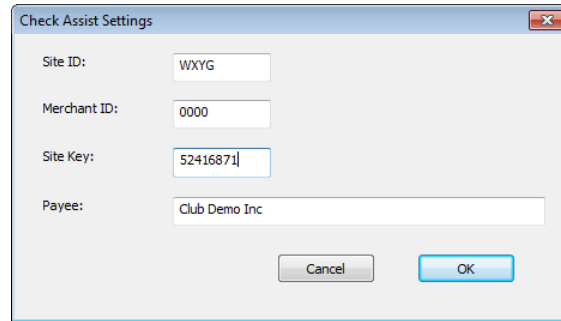
Originating DFI: First 8 digits of Processor Routing # or other # designated by your processor

Include Balance Transaction at end of file:
          Usually checked, but your bank will determine whether this is needed

Check Assist ("QuickCheck")

Check Assist is an ACH processor that provides an online gateway and online reporting.

Check Assist can be reached at 1-888-436-5101, ext 21.
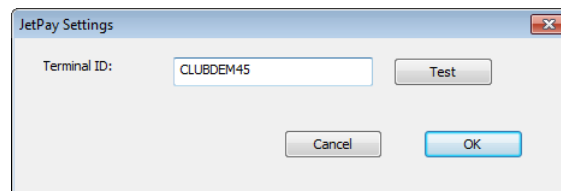
You should obtain the following information from Check Assist:

- Site ID
- Merchant ID
- Site Key (should usually be "0000")
- Payee

JetPay
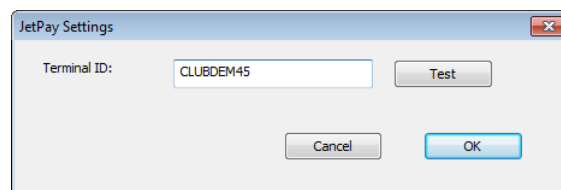
JetPay is an **ACH** processor that provides an online gateway and online reporting.

You should obtain your **Terminal ID** from **JetPay**.

IP Pay
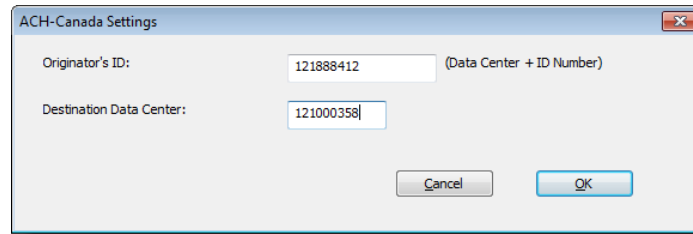
IP Pay is an **ACH** processor that provides an online gateway and online reporting.

You should obtain your **Terminal ID** from **IP Pay**.

EFT-Canada (CPA-005)

The **CPA** (Canadian Payments Association) Format for Electronic Funds Transfer is the standard format used by most financial institutions in Canada.

You will need to obtain the following information from your bank:

- Originator's ID: Bank Data Center + ID Number
- Destination Data Center: Your Bank Data Center

ACH-External

The **ACH-External** method should be selected if you are processing your **ACH** debits completely outside of **Gym Assistant**.

> *Note*:   *There are no additional settings required for this method.*

Other ACH Processing Methods

Please contact Bio-Logic for technical information about other available **ACH** processing methods.

Processing ACH Members

Process Summary

Here are the steps you will do to process your ACH member charges:

1. Select members to charge: Create a list of members due on or before the billing date.
2. Clean up invalid card info: Any members with invalid credit card info can be fixed.
3. Process the payments: Charge member credit cards.
4. Record payments: All payments are recorded in **Gym Assistant**.
5. Process Returns: Any rejected payments are reversed or voided once you are notified by the processor. (see **Processing Returns** section below)

There are very important differences between processing a credit card transactions and ACH transactions:

- Credit card charges are processed in real-time -- once a charge is approved the funds are transferred automatically.
- An ACH transaction; however, is a request to transfer funds -- exactly like depositing a check, you won't know for 3-4 business days if the transfer is successful or not.

Selecting Members to Charge

1. Select **Process Credit Card Members** from the **Billing** menu.

2. **Billing Date** determines what members will be billed. Only members due on or before the Billing Date will be billed.

   - Select a "Billing Date" from the drop down menu.

   - Type in a "Billing Date."

   - Click the calendar ▸ button to specify a "Billing Date."

   Note: Only members who are due on or before the "Billing Date" will be included in the billing list.

3. **Maximum Aging** allows you to filter out members who are delinquent by more than a few months.

   - For example, you might not want to bill members who are more than 3 months past due.

   - If you specify a Maximum Aging of 90 days then members who are due more than 90 days before the Billing Date will not be included in the list.

4. **Include all members with Account Balance Due** allows you to include any member with a balance due even if that member does not have a membership payment due.

   For example, a club might allow members to charge retail purchases to their member accounts for later payment. They could run the billing weekly to collect for the retail balances owed.

5. Click **OK** to continue.

6. The Credit Card Billing window shows a list of all members to-be-billed with all members selected.

Each responsible member is displayed with the following information:

- The billing amount for responsible member

- The balance owed for responsible member

- Total amount due for all dependents

For example, if the amount shown is (2x28/43.00+28.00) then the responsible members owes membership fees of $28 each for 2 months, a previous $43 balance owed, and $28 for his dependents.

7. Hold down the **CTRL** key while clicking on a member in the list to select or unselect that member.

> *Note*: *The total number of members selected and the total amount billed for those selected members will appear at the bottom of the window.*

8. Click **OK** to continue.

Cleaning Up Invalid Accounts

The **ACH Cleanup** window shows the number of members with invalid account information.
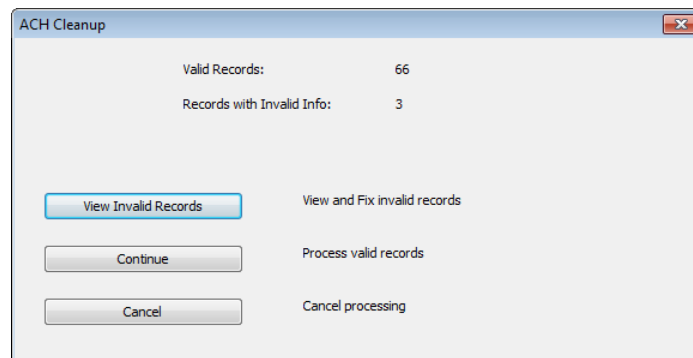
1. Click **View Invalid Records** to see the list of invalid records and make any corrections.
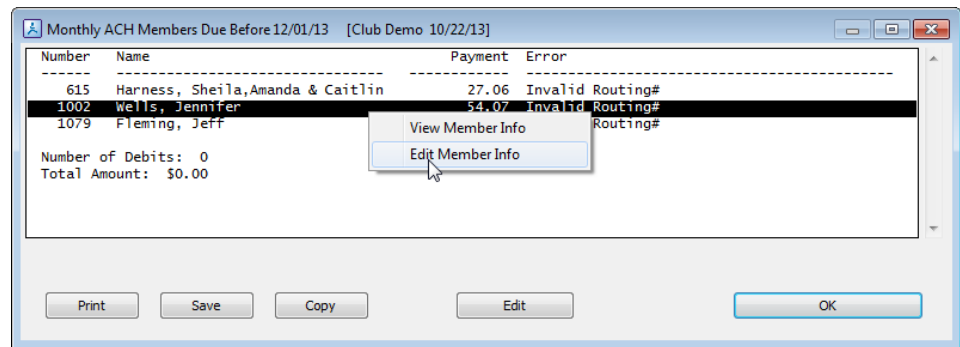
2. **Right-Click** on any member in the list and select **Edit Member Info** to view and change that member's financial info.

3. After reviewing and correcting any invalid card info, click **OK** to return to the **ACH Cleanup** window.

4. Click **Continue** to proceed to the next step.

> *Note:* *Any members with invalid payment info will not be included in the next billing step.*

Processing Payments

The **Process ACH Debits** window title shows the currently selected processing method (which is in this case "EFT-NACHA").
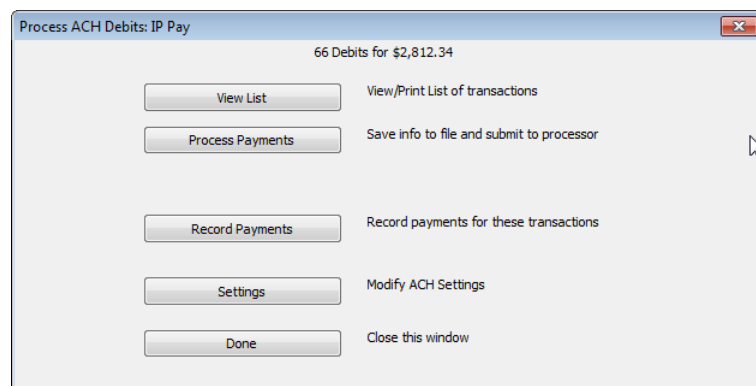
- **View List** – displays a list of the charges that will be processed. It is a good idea to print out the list of charges to reconcile with the report you will receive later from your processor.

- **Process Payments** – will process the charges using the currently selected processing method.

> *Note:* *If you are using one of the integrated payment processing methods (Check Assist, JetPay), then the member payments will be recorded automatically as the charges are processed. (See details for each processing method below.)*

- **Record Payments** – will record all of the payments for this batch. If you are using one of the integrated payment processing methods then you will not need this step, as the payments will be recorded automatically as the charges are processed.

- **Settings** – allows you to change the currently selected processing method and configuration.

NACHA Processing

Gym Assistant will generate a batch file that you can send to your processor (usually by uploading to a secure website).

1. Specify a **File Submission Date**.
   This is usually the date the file is created.

2. You will be asked "**Process as Debit File or Pre-Note file**?"
   Click **Pre-Note File** to send a test file (with all zero amounts).
   Click **Debit File** to send a live file.

3. Enter a **Batch Number**.
   Either accept the default, or enter another value if specified by your processor.

4. Click **Open the folder containing this file** if you want to view the file (for example, if you will be dragging the file to another application). Note that the NACHA format is very complex and not easy to read.

5. Click **OK** to finish.
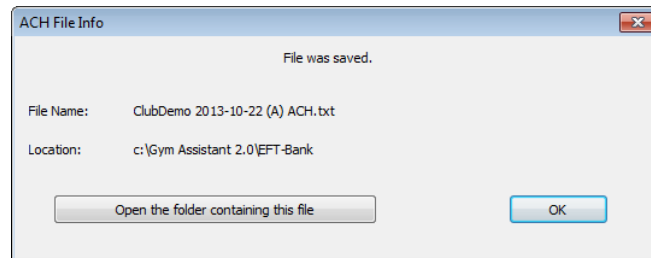
6. You must click **Record Payments** to mark the members as paid in Gym Assistant.

   - Wait until you receive any returns before recording the payments (record payments only for payments that were cleared by your bank), or …

   - Record all payments now and then reverse any rejected payments later.

External Processing Method

The **EFT-External** method assumes that you are processing your ACH payments outside of Gym Assistant. For example you might setup recurring transactions with your bank to continue until the member cancels his membership. With this method Gym Assistant allows you to record all of the transactions at one time.

1. The Process Payments button will not do anything, but you will need to hit **Record Payments** to record that the payments have been made.

2. You must click **Record Payments** to mark the members as paid in Gym Assistant.

    - Wait until you receive any returns before recording the payments (record payments only for payments that were cleared by your bank), or …

    - Record all payments now and then reverse any rejected payments later.

Chapter 8 - Reports

Members List Reports

Members Detail Report

The **Members Detail Report** displays a list of members with comprehensive options for filtering the list and specifying what fields are displayed.

Here is a sample member list:

```
Members Detail     [Club Demo  05/31/13]

Member  Member                  Membership          Billing      Billing      Billing      Due
Number  Name                    Type                Status       Option       Amount       Date
---------------------------------------------------------------------------------------------------
     7  Nagaoka, Davlyn         Senior - No Invoice  ACTIVE      Monthly        38.00     * 11/01/11
    10  Azbill, Nick            Senior               ACTIVE      Monthly        38.00     * 11/01/11
    11  Zamecnik, Dominic       Ohana Membership     ACTIVE      Monthly         0.00       12/31/12
    12  Riddle, Zak             Individual           ACTIVE      Monthly        40.00     * 11/01/11
    13  Harder, Joey            EFT individual       ACTIVE      Credit Card    40.00     * 11/01/11
    15  McGee, Elizabeth        Individual           ACTIVE      Monthly        40.00     * 12/01/11
    17  Saflor, Danny           Individual           ACTIVE      Monthly        40.00     * 12/01/11
    18  Brandenburger, Rohn     EFT Couple           ACTIVE      Credit Card    68.00     * 11/01/11
    19  Rovinsky, Jessica       Family - No Invoice  ACTIVE      Monthly        80.00     * 10/01/11
    20  Nelson, Michael         DEPENDENT            ACTIVE      Monthly         0.00   d * 10/01/11
    21  Miura, Jason            EFT Couple           ACTIVE      Credit Card    68.00     * 11/01/11
    22  Nishimura, Elizabeth    DEPENDENT            ACTIVE      Monthly         0.00   d * 11/01/11
    31  Willis, Liane           Individual           ACTIVE      Monthly        40.00     * 11/01/11

Search Criteria:
  Membership Types:  All
    Billing Status:  Active
420 matches found
Sorted by: Membership Number
```

To generate a member list, select **Members Detail** from the **Reports** menu.

Filtering The List

The **Members Detail Report** window (below) provides a flexible tool to generate a membership list.

The default report displays a list of all Active members (those with Billing Status set to "Active") sorted by membership number. Change any of the following filters to further refine the list for your needs:

Plan Types

Choose the **Plan Types** that you would like to display in the list by making a selection:

- All Plans

- Membership Plans

- Punchcard Plans

- Day-Pass Plans

- Selected Plans

If you choose **Selected Plans**, then the **Select Member Types** window will appear.
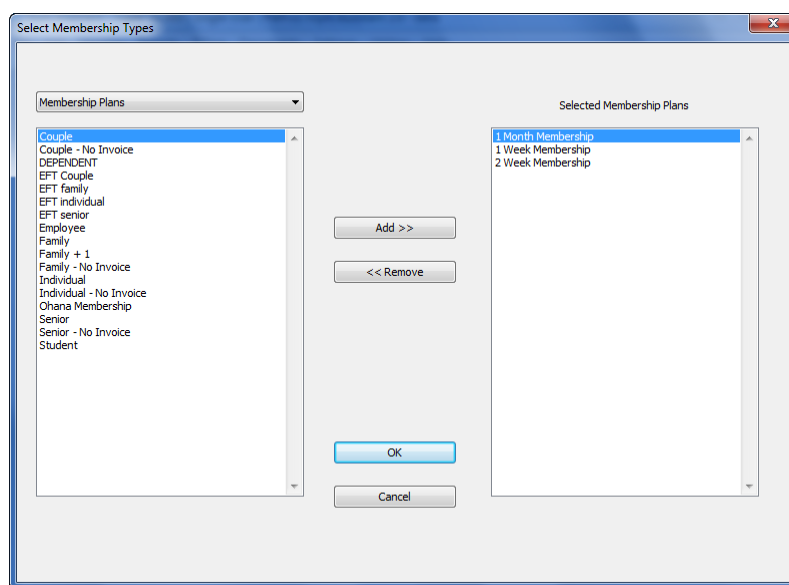
- The list of selected plans appears on the right.

- Click **Add** to add a membership plan to the "Selected Membership Plans" list.

- Click **Remove** to remove a plan from the "Selected Membership Plans" list.

Billing Status

Choose the **Billing Status** that you would like to display in the list by making a selection:

- **All**: Will display members with any billing status.

- **Active**: Will display only members with billing status of "Active".

- **Not Active**: Will display only members with billing status not set to "Active".

- **Selected**: The Billing Status selection window (below) will appear to select status values to display:
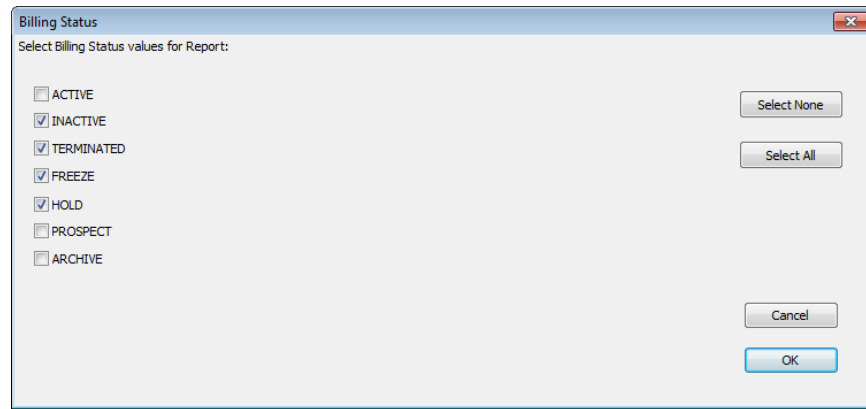
Billing Options

Choose the **Billing Options** to filter:

- Credit Card
- ACH
- 1-Month
- 3-Month
- 6-Month
- Annual
- Selected

If you choose **Selected**, then the Billing Options selection window (below) will appear to select billing options to display:
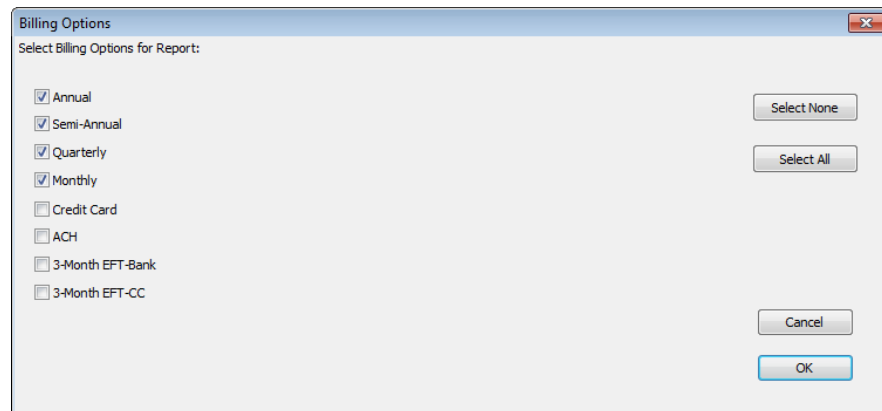
Due Date

This filter can be used to display only members whose due date falls within a specified date range. For example, you might want to display only members whose payments are due in a given month (see below).

Choose a **Due Date** filter:

- **All**: Due date will not be used to filter the list.
- **Before**: Only members due before the specified date will be displayed.
- **Between**: Only members due between the specified dates will be displayed.

- **After**: Only members due after the specified date will be displayed.

Due Date: Between ▼ 05/01/13 » and 06/01/13 »

Contract Begin / Contract End / Signup Date

Choose a filter for Contract Begin/Contract End/Signup

- **All**: this date will not be used to filter the list.
- **Before**: Only members with this date before the specified date will be displayed.
- **Between**: Only members with this date between the specified dates will be displayed.
- **After**: Only members with this date after the specified date will be displayed.

Visits Recorded

This filter can be used to display only members with more than or fewer than a given number of visits over a specified period of time. For example, you might want to display a list of members who have visited the club fewer than 3 times over the past month (shown below).

Visits Recorded: Fewer than ▼ 3 visits Since ▼ 05/31/13 »

Search Fields

This filter lets you display only members whose records contain the specified text. You can specify what fields to search (or "All Fields") and the text for which you want to search.

Search Fields: Comment ▼ Contains ▼ Employee

Member Flags

This filter lets you display only members who have (or do not have) certain conditions in their member records. For example, you can filter on whether or not certain fields are empty: Comment, Alert, Barcode, Photo, and many more….

Member Flags: Has No Photo ▼

Sort By

This field determines the sorting for the list. You can sort on the following fields:

- Membership Number
- Name
- Membership Plan
- Due Date
- Billing Status
- Billing Option
- Contract Begin/End Date
- Signup Date
- Last Visit

- Age
- Etc.

Sort By: Signup Date

Specifying Fields (Columns) for the Report

To change the fields (columns) that appear in the list, click **Fields to Display**.

Check the boxes for all fields that you want to include in the report.

> **Note**: If you include too many fields in a report, the right-most fields may not appear (they will be truncated). To fit the report in a single page width, you may need to (a) reduce the number of fields displayed, (b) print the report in Landscape mode or (c) reduce the text size.

You can also change the **Text Size** for the report in this window.

To retrieve the default fields and text size, click **Get Defaults**.

To make the current fields and text size the default, check the box labeled **Make these the DEFAULT** settings.

Memorizing Reports

Gym Assistant can memorize a report setup for later re-use. For example, you might want to generate a list of all members whose contracts will be expiring in the next month.

> **Note**: The report <u>parameters</u> (filters and displayed fields) are memorized, rather than the list of members.

Memorizing a Report

In the **Members Detail Report** settings window, click **Memorize this Report**.

Then specify a name for the report (e.g. "Contracts Ending").

Loading a Memorized Report

- From the **View Member Info** window select a report from the **Reports > Memorized Reports** menu.

  or

- In the **Members Detail Report** settings window, click **Load a Memorized Report**. The parameters that were saved in the memorized report will be set in the window.

After loading a memorized report, you may need to adjust any date settings before displaying the report.

Membership Summary Report

The Membership Summary report shows a snapshot of your current membership status.

You can display the Membership Summary report either with or without details for each membership plan.

```
MEMBER TOTALS
Active Members:        420
Inactive Members:       88
Total Members:         508

Responsible Members:    53
Dependent Members:      58

MEMBERSHIP PLANS - Active Billing Members Only

Membership Plan   12-Month  6-Month  3-Month  1-Month   EFT-CC EFT-Bank   Other    TOTAL
----------------  --------  -------  -------  --------  ------- --------  -------- --------
TOTALS                .        .         .      323       81       .        .       404

Membership Plan Aging for 404 Active Billing Members

       Up-to-Date:    7     2%
        1-30 days:    0     0%
       31-60 days:    0     0%
       61-90 days:    0     0%
        91+  days:  397    98%


PUNCHCARD PLANS - Active Billing Members Only
                    n>0      n=0      n<0      TOTAL
1 Day  Punch Pas     1        .        .        2
10 punch card pa    11        .        .       25
2 Day Punch Pass     3        .        .        6
4 Punch Pass         1        .        .        2
```

Membership Summary Report
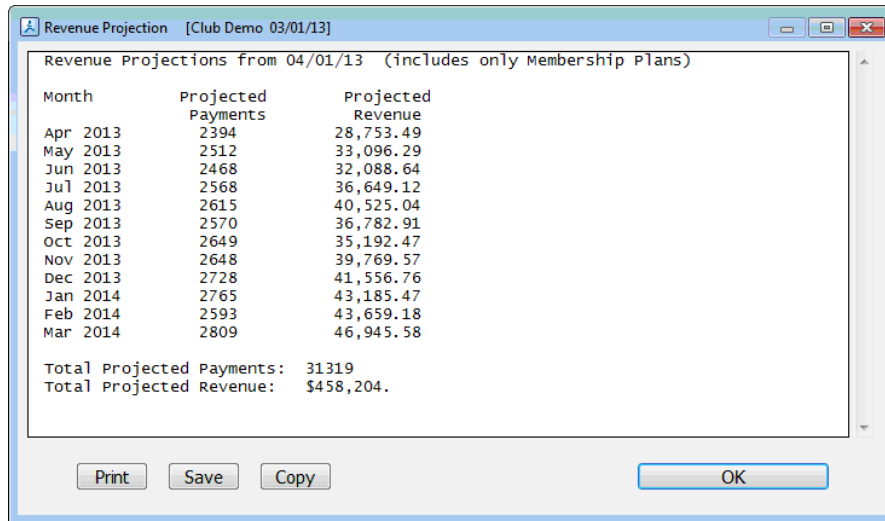
```
Membership Plan   12-Month  6-Month  3-Month  1-Month   EFT-CC EFT-Bank   Other    TOTAL
----------------  --------  -------  -------  --------  ------- --------  -------- --------
1 Month Membersh      .        .        .        .        .        .        .        .
1 Week Membershi      .        .        .        .        .        .        .        .
2 Week Membershi      .        .        .        .        .        .        .        .
Couple                .        .        .       23        .        .        .       23
Couple - No Invo      .        .        .        .        .        .        .        .
DEPENDENT             .        .        .       57        .        .        .       57
EFT Couple            .        .        .        .       23        .        .       23
EFT family            .        .        .        .        .        .        .        .
EFT individual        .        .        .        .       55        .        .       55
EFT senior            .        .        .        .        3        .        .        3
Employee              .        .        .        5        .        .        .        5
Family                .        .        .        3        .        .        .        3
Family + 1            .        .        .        .        .        .        .        .
Family - No Invo      .        .        .        1        .        .        .        1
Individual            .        .        .      200        .        .        .      200
Individual - No       .        .        .        6        .        .        .        6
Ohana Membership      .        .        .        3        .        .        .        3
Senior                .        .        .       13        .        .        .       13
Senior - No Invo      .        .        .        6        .        .        .        6
Student               .        .        .        6        .        .        .        6
----------------  --------  -------  -------  --------  ------- --------  -------- --------
TOTALS                .        .        .      323       81        .        .      404
```

Membership Plan Details

Financial Reports

Financial reports provide information about club revenues over extended periods of time.

Revenue Projection Report

```
Revenue Projection    [Club Demo 03/01/13]

Revenue Projections from 04/01/13  (includes only Membership Plans)

Month           Projected        Projected
                 Payments          Revenue
Apr 2013           2394         28,753.49
May 2013           2512         33,096.29
Jun 2013           2468         32,088.64
Jul 2013           2568         36,649.12
Aug 2013           2615         40,525.04
Sep 2013           2570         36,782.91
Oct 2013           2649         35,192.47
Nov 2013           2648         39,769.57
Dec 2013           2728         41,556.76
Jan 2014           2765         43,185.47
Feb 2014           2593         43,659.18
Mar 2014           2809         46,945.58

Total Projected Payments:  31319
Total Projected Revenue:   $458,204.
```

[Print] [Save] [Copy]   [OK]
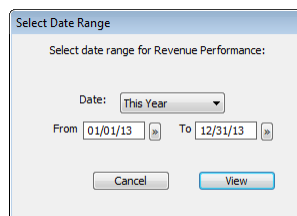
1. Select **Revenue Projection** from the Reports menu.

2. The **Revenue Projection** report calculates the revenue that you can expect to generate each of the following 12 months based on your current membership.

> *Note*:   *This report can help to forecast future revenue fluctuations, which may occur as a result of normal seasonal cycles or special promotions.*

Revenue Performance Report

The Revenue Performance Report shows monthly performance trends over an extended period of time.

1. Select Revenue Performance from the Reports menu.

2. Specify the date range for the report by doing one of the following:

Select Date Range

Select date range for Revenue Performance:

Date: [This Year   ▼]

From [01/01/13] [»]   To [12/31/13] [»]

[Cancel]   [View]

- Select a date range from the pull-down list for convenience (All, Today, Yesterday, This Month, This Year, etc.).

- Type in a beginning and ending date.

- Click the calendar [»] button to select a beginning and ending date.

The report will show revenue totals for each month in the date range, with subtotals for each year.

Sales by Membership Type

The Sales by Membership Type report displays totals sales for each membership type.

1. Select **Sales by Membership Type** from the **Reports** menu.

2. Select a date range for the report.

Journal Reports

Journal Summary Report

The Journal Summary report displays membership change statistics for a specified date range. This report can be used to keep track of operations on a daily or weekly basis.

```
Journal Summary for 03/01/10 12:00A - 03/31/10 11:59P
============ SALES SUMMARY =================
   New Membership Plans          41        2,517.87
   New Punchcard Plans            0            0.00
   New Day-Pass Plans             0            0.00

   Membership Payments          222       21,128.39
   Punchcard Plan Payments        0            0.00
   Day-Pass Plan Payments         0            0.00
   Member Add-Ons                45        1,813.88
   Other Fees                    40        3,575.00
   OnAccount Payments             0            0.00

   Membership Taxes Collected              1,451.75
                                          ----------
TOTAL                                     30,486.89

============ ACCOUNT BALANCE ADJUSTMENTS ======
Charges Applied                   0            0.00
Credits Applied                   0            0.00
OnAccount Payments Made           0            0.00
                                          ----------
Net Account Balance Change                     0.00

============ TOTAL FUNDS COLLECTED ===========
   Cash                          20          535.27
   Check                         57        4,809.00
   CC                           271       25,142.62
   EFT-Bank                       0            0.00
   EFT-CC                         0            0.00
   OnAccount                      0            0.00
                                          ----------
TOTAL                                     30,486.89

============ PAYMENT REVERSALS & REFUNDS ======
   Cash                           0            0.00
   Check                          0            0.00
   CC                             0            0.00
   EFT-Bank                       0            0.00
   EFT-CC                         0            0.00
   OnAccount                      0            0.00
                                          ----------
TOTAL                                          0.00

============ TOTAL NET REVENUE ===============
   Cash                                      535.27
   Check                                   4,809.00
   CC                                     25,142.62
   EFT-Bank                                    0.00
   EFT-CC                                      0.00
   OnAccount                                   0.00
                                          ----------
TOTAL                                     30,486.89

Members Added                    41
Members Inactivated               0
Members Activated                 5
Members Deleted                   1
Void Transactions                 5
```

1. Select **Journal Summary** from the Reports menu.

2. Select a **Date Range** for the report.

3. Check **Include ProShop Journal Transactions** to include ProShop totals in the report.

Journal Detail Report

The Journal Detail report displays transaction details for a specified date range.

The details can be displayed in **a Detail (verbose)** format or **Tabulated Columns** format.

```
Gym Assistant Journal Detail for 03/02/10 - 03/02/10      [Club Demo  06/18/13]

Date      Time    Mem# Name                    TransID  Action        Description
------------------------------------------------------------------------------------------------------------
03/02/10 09:39A   796 Webb ( W Art Webb 888), Go  8228  Payment       $   74.55 (CC) for Monthly,for $71 Walk-In-And-Pay 1 Month each, Pd 02/28-
03/02/10 11:30A   870 Murphy, MS. Stuart               Add Membership $  174.30 (CHK#459) for Monthly '$71 Walk-In-And-Pay 1 Month each',Due 04/
03/02/10 02:53P    61 Hoffman, Jeneen            8231  Payment       $   74.55 (CHK#931) for Monthly,for $71 Walk-In-And-Pay 1 Month each, Pd 0
03/02/10 03:49P   871 Bradshaw, Margaret-Anne          Add Membership $  174.30 (CC) for Monthly '$71 Walk-In-And-Pay 1 Month each',Due 04/02/10
03/02/10 04:01P   872 Young, Susan                     Add Membership $  145.95 (CHK#68) for Monthly 'ON TRACK Credit Card',Due 04/02/10 (Dues=6
03/02/10 04:26P   788 Lundell, Garth            8236  Payment       $  223.65 (CC) for Monthly,for $71 Walk-In-And-Pay 1 Month each, Pd 02/26-

31,162 entries in journal
6 entries in selected date range
Total Revenue: $867.30
```

Detail (verbose) format

```
Gym Assistant Journal Detail for 03/02/10 - 03/02/10      [Club Demo  06/18/13]

Date      Time    Mem# Name                    TransID  Action            Dues      Fees     Taxes   Account
------------------------------------------------------------------------------------------------------------
03/02/10 09:39A   796 Webb ( W Art Webb 888), Go  8228  Payment          71.00     0.00     3.55     0.00 CC
03/02/10 11:30A   870 Murphy, MS. Stuart               Add Membership   71.00    95.00     8.30     0.00 Check
03/02/10 02:53P    61 Hoffman, Jeneen            8231  Payment          71.00     0.00     3.55     0.00 Check
03/02/10 03:49P   871 Bradshaw, Margaret-Anne          Add Membership   71.00    95.00     8.30     0.00 CC
03/02/10 04:01P   872 Young, Susan                     Add Membership   64.00    75.00     6.95     0.00 Check
03/02/10 04:26P   788 Lundell, Garth            8236  Payment         213.00     0.00    10.65     0.00 CC

                                                        TOTALS          561.00   265.00    41.30     0.00

31,162 entries in journal
6 entries in selected date range
Total Revenue: $867.30
```

Tabulated Columns format

1. Select **Journal Detail** from the Reports menu.

2. Select a **Date Range** for the report.

3. Select **Transactions to Display**. This setting allows you to display only transactions of the desired type. For example:

    - All – No filtering

    - Money Transactions – Only those with money exchanged

    - Add & Delete – Member additions and deletions

    - Etc.

4. Select a **Remittance Type** to display. This setting allows you to display only transactions of the specified remittance type:

    - All – No filtering

- Cash, Check, CC, OnAccount, EFT-Bank, EFT-CC

5. Select a **Format** for the report:

- Show Details – Detailed (verbose) format (see above).

- Show Tabulated Columns – Column view to display revenue collected (see above).

Note: The Journal Detail report displays only Gym Assistant transactions. It does <u>not</u> include ProShop transactions. ProShop transaction details must be viewed in ProShop.

Shift Journal Summary

The Shift Journal Detail report displays transaction details for a specified time period on a specified date.

Shift Journal Detail

Visits Reports

Visits Detail

The **Visits Detail** report lists all members that visited the gym during a given period of time.

1. Select **Visits Detail** from the Reports menu.

2. Specify the time span for the report, and then click **View** to generate the report.

GymAssistant 2.02 (20131212)-draft[1].doc

Visits Summary

The **Visits Summary** report lists the total visits for a gym during a given period of time

1. Select **Visits Summary** from the Reports menu.
2. Specify the time span for the report, and then click **View** to generate the report.
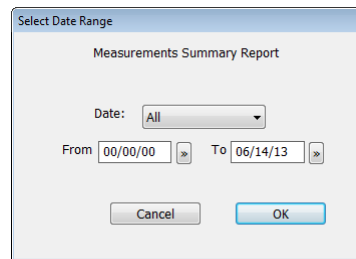
Measurement Reports

Measurement Summary
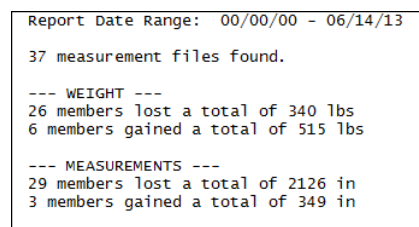
The Measurement Summary report shows the total weight losses and gains for the whole club.

1. Select Measurement Summary from the Reports menu.

2. Specify the date range for the report.

Measurement Detail

The Measurement Detail report shows the measurement changes for each member.

1. Select Measurement Detail from the Reports menu.

2. Specify the date range for the report.

```
Club Measurement Summary    [Club Demo 06/14/13]

Report Date Range:  00/00/00 - 06/14/13

  Num  Name                          Measure-     Weight   Weight     Meas     Meas
                                        ments        Loss     Gain     Loss     Gain

   28  Rutter, Gerri                      3         2.9                        143.65
  107  Obedkoff, Evelyn                   2         0.0                0.00
  142  Lindsay, Ruth                      3                 203.6      5.29
  425  Harris, Kathy                      2         4.8                4.00
  518  Warwick, John                      2                   1.8                69.75
  572  Tirling, Paulette                  5                   0.6               136.00
  573  Carter-Johnson, Catherine          2                   0.8     37.50
  574  Green, Winnie                      2         6.8                5.50
  714  Windwick, Christel                 3         2.2                8.74
  737  Peacey, Evelyn                     2         4.5              262.50
  766  LaFrance, Jack                     6                 191.2      0.00
  805  Williams, Courtney                 3       153.8             1222.50
  809  Leff, Donna                        2                 116.6     59.25
  834  Bradley, Vera                      3         8.2                2.50
  880  Storgeoff, Hope                    8       145.2               46.00
  937  Lubis, Linell                      3         7.6              166.25
  951  Thompson, Walter                   2         3.8              306.25

37 measurement files found.

--- WEIGHT ---
11 members lost a total of 340 lbs
6 members gained a total of 515 lbs

        Print        Save       Copy                              OK
```
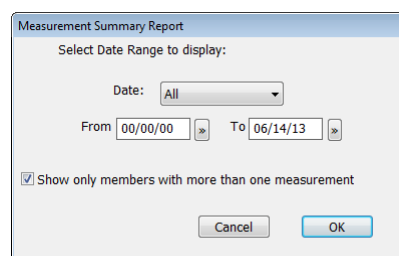
Punchcard Add-On Reports

Add-On Usage/Activity

The Add-On Usage/Activity report displays information about revenue and usage of punchcard add-ons.


```
Add-On Usage for 06/01/13 - 06/29/13    [Club Demo 06/14/13]

MEMBERSHIP ADD-ON USAGE SUMMARY

MEMBERSHIP ADD-ON USAGE SUMMARY

   Add-On       Credits      Cost     Packages     Revenue     Credits    Credits    Unused
   Name         per Pkg    per Pkg   Purchased    Received   Purchased      Used    Credits
-----------------------------------------------------------------------------------------------
Cardio Class      10        24.75        0           0.00        0           0         31
Fitness Class     12       100.00        0           0.00        0           0          0
Locker            20        25.00        1          20.25       10           5         35
Pilates           10        50.00        1          13.50       10           2         34
Smoothie           5        25.00        0           0.00        0           0         77
Spinning          10        50.00        0           0.00        0           0          0
Supplement        10        30.00        0           0.00        0           0          5
Towel             10         5.00        0           0.00        0           0          4
Water             11        10.00        1          10.00       11           6        115
Unknown            0         0.00        0           0.00        0           0          0
-----------------------------------------------------------------------------------------------
Total              0         0.00        3          43.75       31          13        301

13 credits used for 06/01/13 - 06/29/13

       Print        Save       Copy                              OK
```

1. Select Add-On Usage/Activity from the Reports menu.


```
Select Date Range

    Select date range to view Activity Usage Log:


        Date:   This Month

      From  06/01/13  »    To  06/30/13  »


              Cancel            OK
```

2. Specify the date range for the report, then click **OK**.
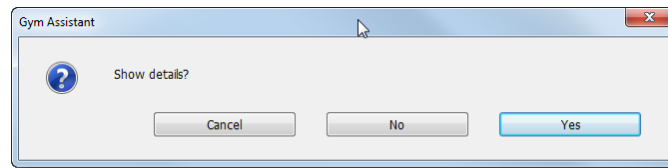
3. Click **Yes** to display details of each add-on credit used or click **No** to display only a summary of usage.

Members with Add-On Credits

The Members with Add-On Credits displays a list of all members who have purchased punchcard add-ons

Other Reports

Birthdays

The Birthdays report will display a list of all members whose birthdays fall during a specified month.

1. Select **Birthdays** from the **Reports** menu.
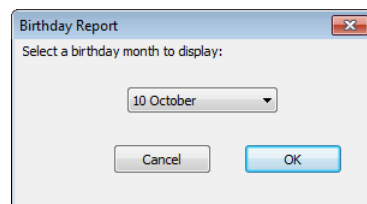
2. Select a month of the year to list birthdays, then click OK.
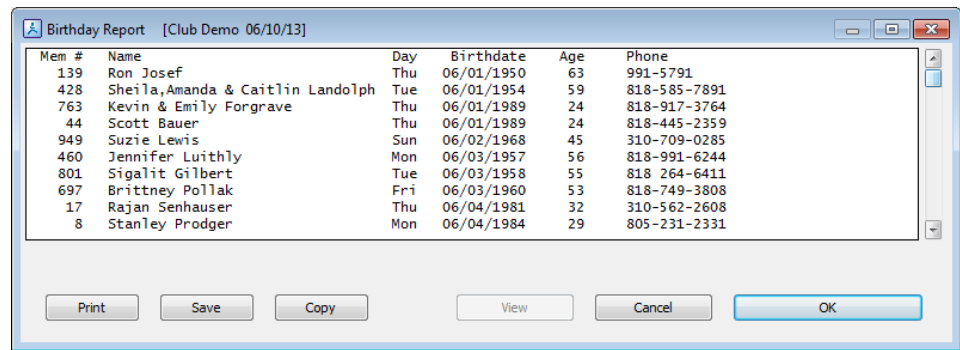
The report lists the birthdate, age and phone for each member with an upcoming birthday, and the report is listed by date.

To take an action for the members in the list click **Print**.
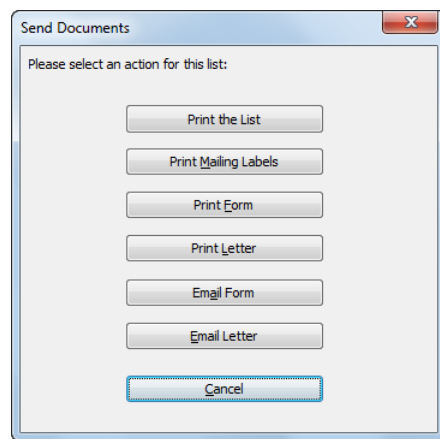
Now select one of the following actions:

- Print the List

- Print Mailing Labels

- Print Form – Select a merge form to print for each member in the list

- Print Letter – Select a merge letter to print for each member in the list

- Email Form – Select a merge form to email to each member in the list

- Email Letter – Select a merge form to email to each member in the list

Linked Memberships

The Linked Memberships report displays a list of all primary (responsible) and dependent members. This report is useful to review linked memberships to confirm that primary and dependents are of the same billing period and due date.

3. Select Linked Memberships from the Reports menu.
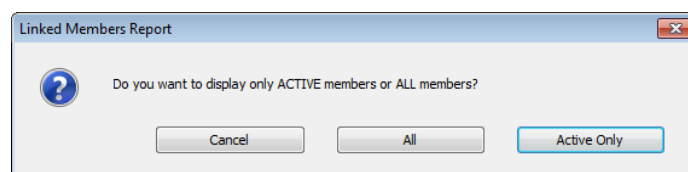
1. Click **All** to display all linked members, or click **Active Only** to filter out family memberships for which no members are active.

2. To view or edit any member in the list, **right-click** on the entry for that member and select **View Member Info** or **Edit Member Info**.

Punchcard Usage/Activity

The Punchcard Usage/Activity report shows overall activity for all Punchcard Plan members.

Members Due Now

The Members Due Now report displays a list of all members whose due date is today or before today.

1. Select **Members Due Now** from the **Reports** menu.

2. The Members Detail report filter window appears with the Due Date set to today's date:
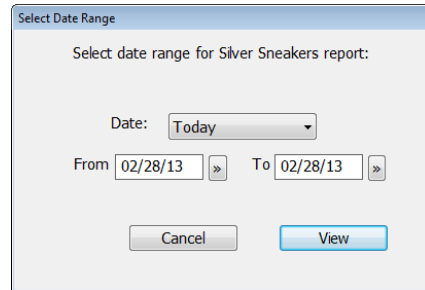
3. Specify any additional filters for the report then click **Display Report**.

Silver Sneakers Visits

The Silver Sneakers Visits report will generate a standard report (in CSV format) to send member usage information to Silver Sneakers.

Only members with a Silver Sneakers ID will be included in the report. To Enter a member's Silver Sneakers ID click **Edit Member Record**, then select the **Other** tab.

1. Select Silver Sneakers Visits from the Reports menu.

2. Specify the date range for the report, then click View.

The number of visit entries and included members will be displayed.

Chapter 9 - Photo Capture

Capturing a Member's Picture

Gym Assistant can capture member photos for display with a member's **Check-In** information. You have three options to get a member photo into Gym Assistant:

- Capture a live picture

- Import a picture file

- Copy and Paste a picture from another application

> **Note**: A web camera source must be connected to your computer and functioning correctly for this function. This button is only visible if you have installed and enabled the Photo Capture add-on. (See the "**Photo Capture Setup**" document for details)

Setting up Photo Capture

1. Select **Photo Capture** from the **Settings** menu.
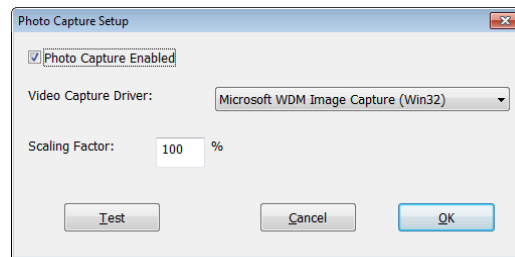
2. Check the **Photo Capture Enabled** box.

   The PhotoCapture functionality must be purchased with Gym Assistant. If you have not yet entered your PhotoCapture registration code you will have to enter the code now before continuing.

3. Set the **Video Capture Driver** to "Microsoft WDM Image Capture (Win32)".

4. Click **Test** to test the video capture settings.

> **Note**: If this is the first time you have connected to your webcam (or if you have more than one webcam attached to your computer) then the Video Source window will appear. Select the desired webcam and click **OK**.
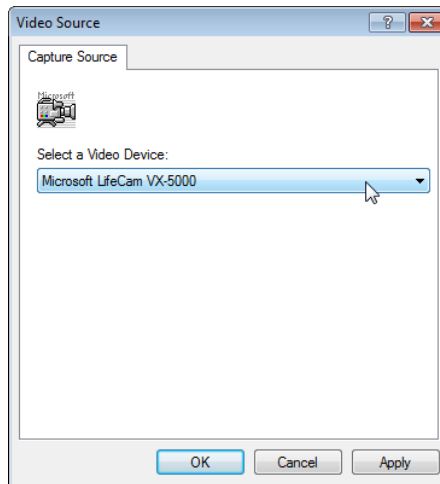
Editing a Member Picture

While viewing a member record click the member photo box or click **Picture**.

> *Note*: *If the photo box or Picture button do not appear in the View Member Info window then you must enable Photo Capture. See "Photo Capture Setup" above.*

Capturing a New Picture

1. Click **Capture New Picture** and the **Picture Capture** window will appear.
2. To freeze the image, press the **ENTER** key or click **Capture**.
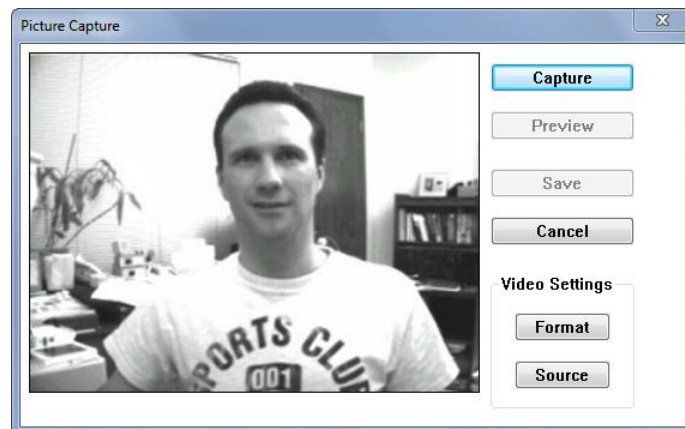
3. To un-freeze the image and return to live video, click **Preview**.
4. To adjust the captured image size and resolution, click **Format**.
5. To adjust the image brightness and contrast or zooming, click **Source**.
6. When you are satisfied with the image you have captured, click **Save**.

Importing a Picture

1. Click the **Import Picture**.

2. Navigate to the picture to import and click **Open**.

Pasting a Picture from the Clipboard

1. You must first copy an image from another program, such as **Picture Viewer** or **Adobe PhotoShop**.

   Note: *The "Paste from Clipboard" button will be enabled only if there is a valid picture file on the clipboard.*

2. Click **Paste from Clipboard**.

Edit Picture for #1882 Jon Doe

- Capture New Picture
- Paste from Clipboard
- Import Picture
- Delete Picture
- - Smaller
- + Bigger
- Fit to Size
- Re-Center
- Crop

Click and Drag to move image

- Cancel
- Save
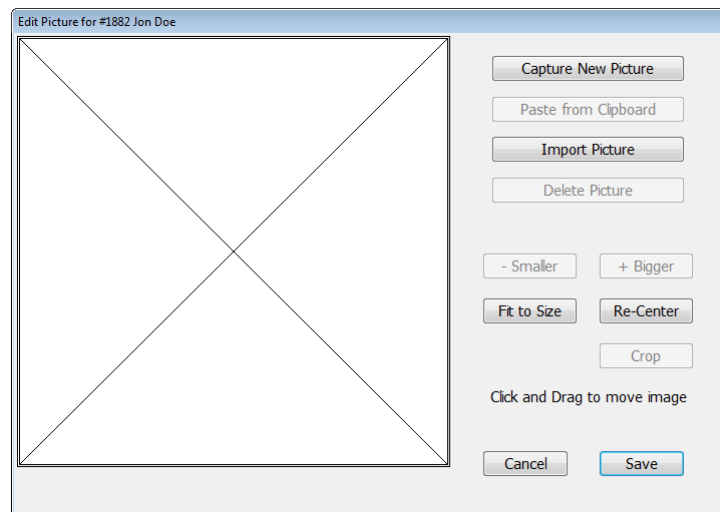
3. The new image will appear in the **Edit Picture** window.

4. The small rectangle that appears represents the area of the picture that will appear with the member's record.

5. Click on the rectangle and drag it to center the person's image in the box.

6. If necessary, click the "**- Smaller**" or "**+ Bigger**" buttons to make the image bigger or smaller.

7. When you are finished, click **Save** and the new picture will appear with the member's record.

Chapter 10 - Users and Passwords

Gym Assistant allows you to control access to different parts of the software. For instance you might want to allow regular staff to add members and accept payments but not to change member contracts or view member financial information. The software will also log each User's activity for later review. In simple terms, you can control what people are able to do, and later you can see what they did.

A **Master Password** should be created which will allow access to all features. This password should be given only to critical staff members such as the club owner and manager.

> **Note:** If you forget your Master Password, please contact Bio-Logic.

Each person who uses the software should be added as a **User**. Each User is given a set of **Permissions**, which determine the allowed areas of the software.

For convenience you can create a set of Permissions for a **Group**. Each User that is attached to a Group is automatically assigned all permissions defined for that Group. For example, you might have created a Group called "**Front-Desk Staff**" with access limited to checking in members and accepting member payments.

Setting Up Users and Groups

Select **Password and Users** from the Settings menu.
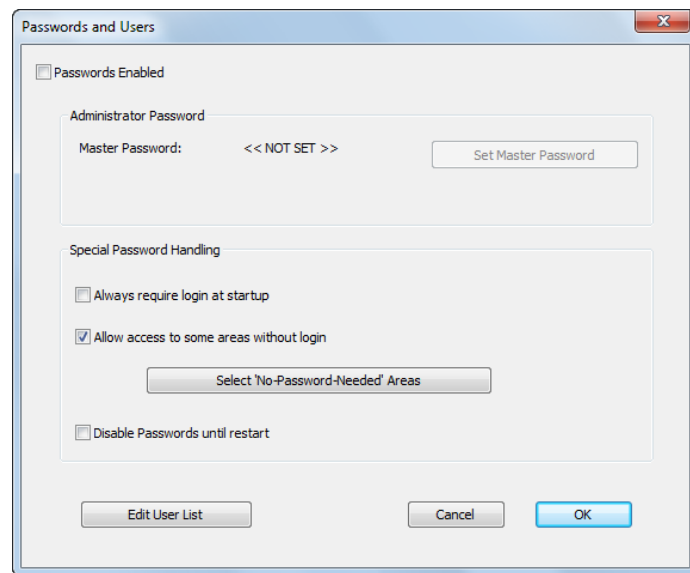
> **Note:** To use passwords you must (1) enable passwords and (2) define a Master Password.

Password Enabled

Check **Passwords Enabled** to turn on passwords. This box <u>must</u> be checked to enable password protection in the software.

Set Master Password

Click **Set Master Password** to set the master password. After entering a new Master password you must then enter the password again to confirm. If you want to remove an existing Master password just enter a blank password.

> *Note*: *The master password will override all other passwords and allow access into all features in the software. Never use the master password for everyday work, as you should grant all users access to all functions.*

Always require login at startup

Check **Always require login at startup** to prevent non-users from starting Gym Assistant. If this box is checked then a valid User password is required to startup Gym Assistant. If this box is not checked then anyone can start Gym Assistant and view member data.

Allow Access to some areas without login

If this box is checked then you can specify a list of areas that can be accessed with no password. For example, you might want to allow staff to record member payments without entering a password.

> *Note*: *We recommend limiting use of this feature. Click **Select 'No-Password-Needed' Areas** to define the areas that will not require any password. (See "Setting Permissions" below.)*

Disable Passwords until restart

Check this box to temporarily disable <u>all</u> password protection. Password protection will remain disabled until either:

- you exit Gym Assistant, or
- you return to Passwords and Users and uncheck this box.

This feature is useful if you will be doing a lot of administrative work (e.g. changing lots of member records) and you don't want to enter your password every time. If passwords are temporarily disabled the background screen in the software will very blatantly display "Passwords Are Disabled!" to remind you that security is currently off.

Edit User List

Click this button to edit the User list. (See below.)

Editing the User List

In the Password and Users window, click **Edit User List**.
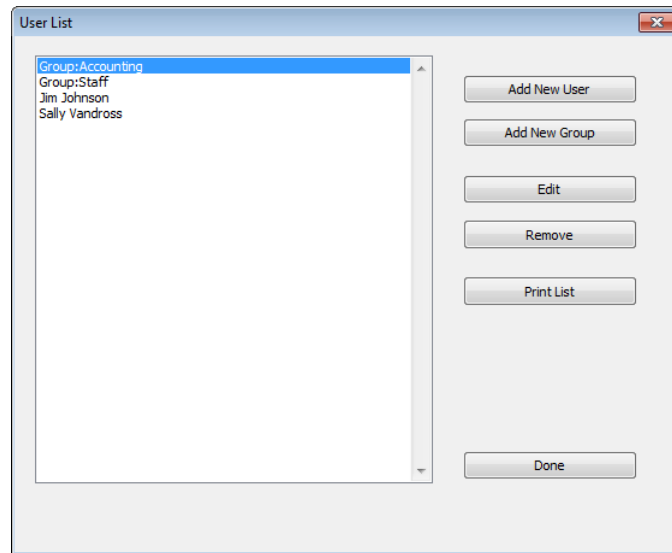
Add New User

Click **Add New User** to add a new user. The **Edit User** window will appear to set the new user information. See "Adding/Editing a User" below.

Add New Group

Click **Add New Group** to add a new Permissions Group. A Group is a set of permissions shared among users. The Password Permissions window will appear to set permissions for the new group. See "Setting Permissions for a User or Group" below.

Edit

Click **Edit** to edit the selected User or Group. See "Adding/Editing a User" or "Setting Permissions for a User or Group" below.

Remove
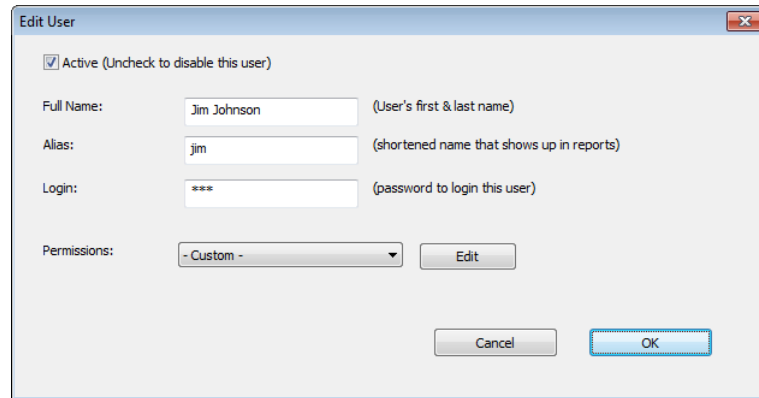
Click **Remove** to remove the selected User or Group.

Print List

Click **Print List** to print the User List.

Adding / Editing a User

The **Edit User** window appears whenever you are adding a new User record or editing an existing User record.

- **Active** checkbox should be checked if this user is active. If unchecked then this user will not be allowed to login.

- **Full Name** should be the user's first and last name.

- **Alias** is a shortened version of the user's name that will appear in reports and on receipts. It could be just the user's first name or initials.

- **Login** is the password for this user. To login only a user's password is required, not username and password.

Permissions

- If this user is the member of a **Group**, then select the appropriate **Group** from the list. The user's permissions will automatically set to the permissions set for his selected group.

- If you want to set custom permissions for this user, then select **Custom** from the list then click **Edit** to set the permissions for the user. (See "Setting Permissions for a User or Group" below.)

Setting Permissions for a User or Group

The **Password Permissions** window allows you to specify permissions for a **User** or **Group**.

1. Check the **Master User** box to give this user access to <u>all</u> parts of the software.

2. Check the box for each area of the software that should be accessible by this user or group.

3. Click "**Select All**" to select all areas, or click "**Select None**" to clear all areas.
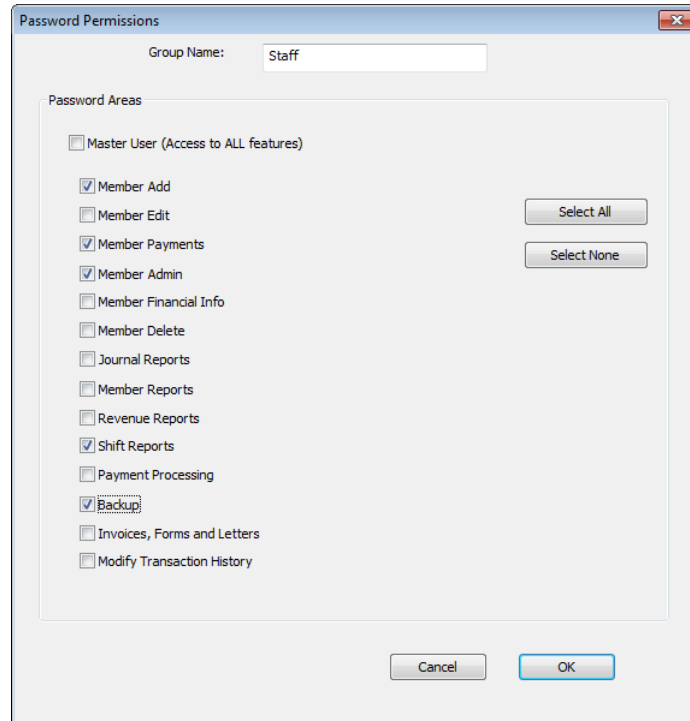
Chapter 11 - Networking

A Gym Assistant network license upgrade allows multiple computers in your club to run **Gym Assistant** and **ProShop** while sharing a single set of data. Each workstation has full read/write privileges, so any changes made on one workstation will appear automatically on the other workstations.

Gym Assistant networking requires the following:

- Gym Assistant Network License (for 2-Users, 5-Users or 10-Users)

- Wired or wireless local area network (wired is recommended)

- A shared data folder available to all computers on the network

How It Works

Gym Assistant Networking requires a simple shared data folder. This folder can be placed anywhere on your local network, as long as all of the workstations can access the folder and modify files in the folder.

Gym Assistant Networking <u>DOES NOT</u> require a "**server**" computer.

It requires only a "host" computer (or network drive) that will hold the data.

Here are the basic steps to setting up Gym Assistant networking

1. First, create the **Data Folder** and share that folder with all other computers on the network.

2. Install **Gym Assistant** on one computer.

3. After entering your registration information, **Gym Assistant** will ask you to <u>Create</u> a "**New Data File**." Select the **Data folder** you created in <u>Step 1</u>.

4. Install Gym Assistant on the other computers.

5. At startup, **Gym Assistant** will ask you to find a data file.

6. Point the application to the same **Data Folder** that you created in **Step 1**, and all the computers will automatically point to the same **Data Folder**.

Creating a New Data Folder

Where to store the data?

First you must decide where to locate your data on the network.

For most customers we recommend that the data reside on the front-desk workstation where the majority of Gym Assistant work is done (e.g. member check-in). This option allows your check-in computer to function normally if there is a problem with your network.

Another option is to locate the data on a back-office workstation or network drive. This option secures the data away from the front-desk, but runs the risk of shutting down the front-desk function if there is a network problem or if the back-office workstation is turned off.

Create and name new folder.

We recommend that the data folder reside at **c:\Gym Assistant Data** on the "**host**" computer.

Sharing the Data Folder on the Network

Sharing in Vista / Windows 7 / Windows 8

Turn off "password protected sharing" on the host machine.

Before sharing your data folder (on the host machine) you must setup your computer to allow sharing between all computers in the network.

1. Open Network and Sharing Center:

   - In Windows 7 or Vista click the Start button and type "**Network**," then select "**Network and Sharing Center**" from the list that appears.

   - In Windows 8 open **Computer**, then right click on "**Network**" and choose "**Properties**."

2. Click the "**Change Advanced Sharing Settings**."

3. Under **File and printer sharing** select "**Turn on file and printer sharing**."

File and printer sharing

When file and printer sharing is on, files and printers that you have shared from this computer can be accessed by people on the network.

   ◉ Turn on file and printer sharing
   ○ Turn off file and printer sharing
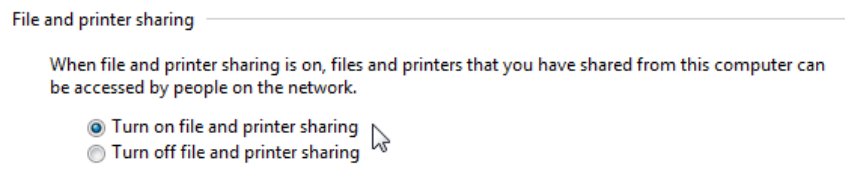
4. Under **Password protected sharing** select "**Turn off password protected sharing**."

Password protected sharing

When password protected sharing is on, only people who have a user account and password on this computer can access shared files, printers attached to this computer, and the Public folders. To give other people access, you must turn off password protected sharing.

   ○ Turn on password protected sharing
   ◉ Turn off password protected sharing
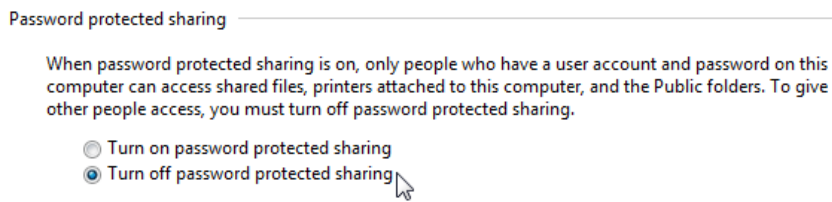
Share the Data Folder

1. On the host computer, right click on the **Data Folder** and select "**Share With** / **Specific People**."

2. In the **File Sharing** window that appears, click the drop-down menu and select "**Everyone**."
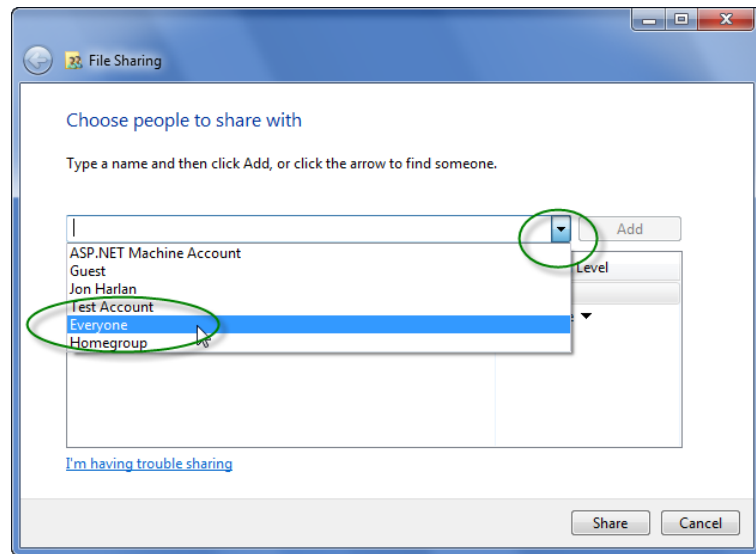
3. Click **Add**.

4. Click the drop down menu triangle on the "**Everyone**" line in the list and select "**Read/Write**."
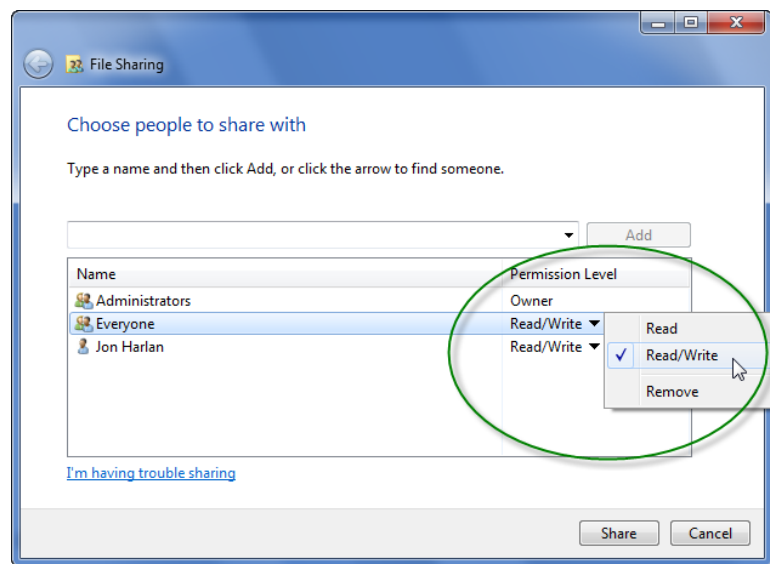
5. Click **Share**.
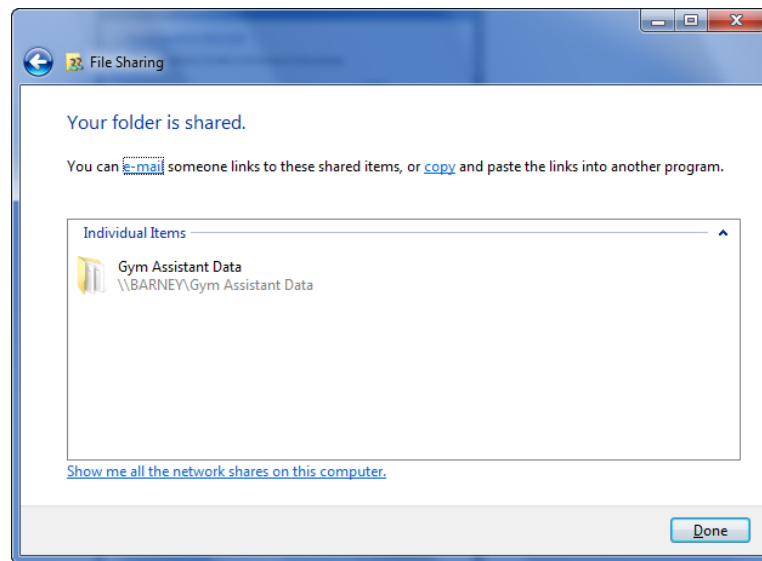
Note: The shared folder will be displayed. The path to the new shared folder will be in the form **\\ComputerName\FolderName**, where **ComputerName** is the name of the host computer and **FolderName** is the name of the shared folder.

This is the path that all other workstations will use to locate the data folder.

Sharing in Windows XP

1. Right-click on the "**Data Folder**" and then select "**Sharing and Security**."
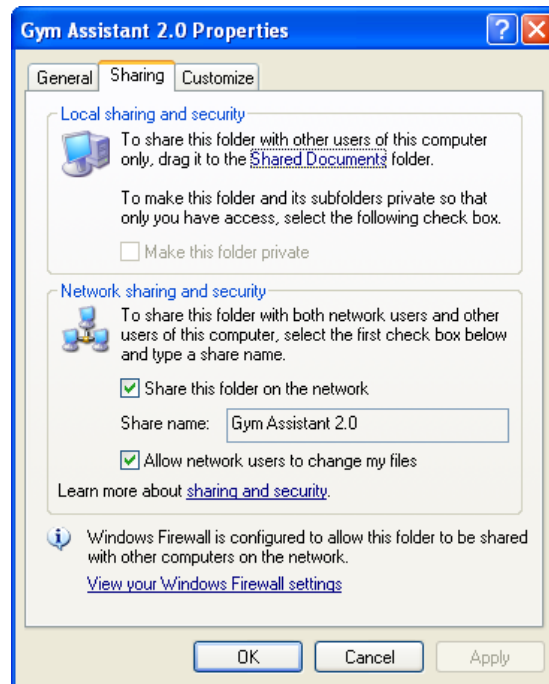
2. Check the box labeled "Share this folder on the network."

3. Check the box labeled Allow network users to change my files."

4. Click **OK**.

Installing Gym Assistant on All Workstations

Confirm that each new workstation can access the shared data folder

1. Open **Computer**.

2. Navigate to the shared data folder.

   > **Note:** If the shared folder is on this computer, then open the **C:\ drive** and skip the remaining steps

3. Click on **Network**. Network

4. Find the name of the <u>computer</u> on which the shared data folder was created.

5. Find and open the shared data <u>folder</u> on that computer.

6. If you are able to open the shared data folder, then proceed to the next step.

Install and configure Gym Assistant on each workstation

1. Install **Gym Assistant**.

2. When the application starts the **No Data Found** window appears.
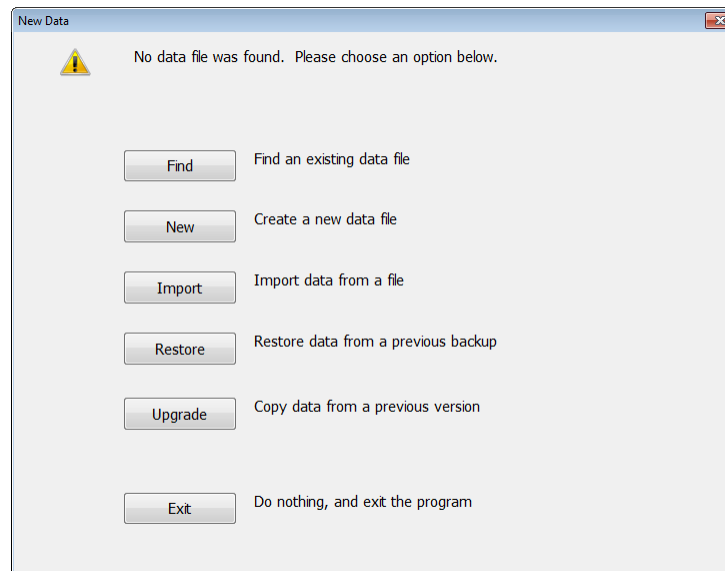
- If this is the first workstation to run Gym Assistant then click **New** and follow the steps.

- If this is <u>not</u> the first workstation to run **Gym Assistant** (and the data file has already been created) then click **Find**.
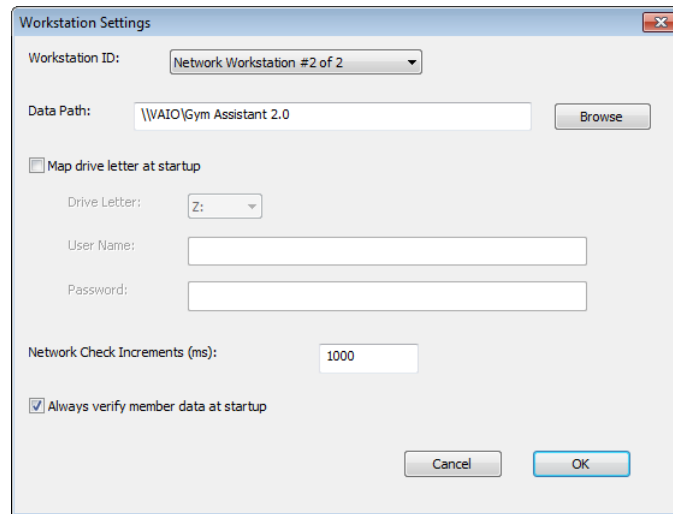
1. In the **Workstation Settings** window set the **Workstation ID** to a **Network Workstation** number not used by any other workstation.

2. Click **Browse** then navigate to the shared data folder.

3. Open the "**Members.dat**" file (which may appear just as "**Members**").

    Note: *The path to the data file will appear in the Data Path field.*

4. Check the **Map drive letter at startup** box only if the shared data path requires that you enter a User Name and Password. This is usually required only for "Home" editions of Windows.

5. Change **Network Check Increments** only if directed to do so by **Gym Assistant** technical support.

6. Uncheck **Always verify member data at** startup only if a slow network connection causes problems when the program starts.

Chapter 12 - Connecting a Barcode Reader

Introduction

Gym Assistant is designed to allow members to check-in without requiring intervention from the front-desk staff. This is a feature we call "**unattended check-in**."

A tone will indicate the member's status (either **OK** or **Not OK**), and the member's visit (either an "**allowed**" entry or a "**denied**" entry) will be recorded automatically.

GateKeeper is an add-on application (included with Gym Assistant) that works with Gym Assistant to handle barcode scans and background check-ins.

- When GateKeeper receives a barcode number from the scanner it searches the Gym Assistant membership database to find a match and then handles the check-in automatically.

- If Gym Assistant is displaying the main View Member Info window then that member's information automatically appears to display the member's check-in status.

- With GateKeeper you can monitor up to 8 scanners (called "access points") independently.

- You can specify when the entrance is enabled, what members are allowed entry, and what actions to take when a card is scanned.

- In addition to barcode scanners, GateKeeper can also interface with numeric keypads, proximity card scanners, magnetic stripe (credit card) scanners and fingerprint scanners.

Why Use a Serial Interface Barcode Scanner?

Most barcode scanners have a USB or keyboard interface, and they act like a **keyboard device** – when a barcode is scanned, it appears as if the barcode number was typed on the keyboard and the "**Enter**" key was hit. This is great if the cursor is sitting in a field that is waiting for someone to type in a number and the "**Enter**" button is hit, but it just does not work if the **User** is trying to use other programs on the computer. For example, if you are writing a Word document and a member scans his card the numbers will appear in the Word document.

With a **Serial Interface** (RS232) scanner an application can listen for input from the scanner and handle that input in the background, independently of what's happening onscreen. The Serial (RS232) port is an older technology, but that old technology is the best and only way to handle barcode scans in the background.

Most new computers do not include built-in serial ports, so you will probably need to add one or **more USB/Serial Adapters**. A USB/Serial adapter allows you to connect any Serial device to a USB port. You can purchase USB/Serial Adapters direct from www.GymAssistant.com/store.

> *Note*: Access Control applications require a slightly different adapter, so contact Gym Assistant if you have any questions.

Note: *Some higher-end USB barcode scanners have a built-in USB/Serial adapter that must be properly configured before use. Please refer to your barcode scanner's User's Guide for more information.*

Connecting the Barcode Scanner

Metrologic/Honeywell – Fusion Laser Scanner

1. Connect the L-shaped plug of the power supply into the power jack on the barcode scanner cable.

2. Connect the power supply into an AC outlet.

    Note: The outlet should be near the equipment and easily accessible.

3. The scanner should emit a short beep to indicate a successful power-up and the **BLUE** LED on top of the scanner should be lit.

4. Place the scanner securely in its base. The **YELLOW** LED on top of the scanner should light to indicate the auto-scan function is ready.

5. When you scan a barcode, the scanner should emit a short beep and the **WHITE** LED on top of the scanner should flash.

    Note: When not being used, the scanner will turn off the laser to save energy. Placing any object in front of the scanner will turn on the laser.

6. Now connect the scanner Serial port to your USB/Serial Adapter or built-in Serial port on your computer.

ZBA Scanner – CCD Scanner

Note: Discard the ZBA Driver CD that came with your scanner. You will not need the drivers with GateKeeper.

1. Connect the plug of the power supply into the power jack on the barcode scanner cable.

2. Connect the power supply into an AC outlet.

   Note: The outlet should be near the equipment and easily accessible.

3. The scanner should emit a long beep to indicate a successful power-up, and the **GREEN** LED on top of the scanner should illuminate for **1 second** and then turn off.

4. The **RED** scan light should be on constantly.

5. When you scan a barcode, the scanner should emit a short beep and the LED on top of the scanner should flash **RED** briefly.

6. Now connect the scanner Serial port to your USB/Serial Adapter or built-in Serial port on your computer.

IDTech Omni Slot Scanner

1. Connect the plug of the power supply into the power jack on the barcode read cable.

2. Connect the power supply into an AC outlet.

   Note: The outlet should be near the equipment and easily accessible.

3. The barcode scanner should emit a long beep to indicate a successful power-up.

4. The **GREEN** LED on top of the scanner and the **RED** light inside the scanner slot should remain **ON**.

5. Quickly swipe a barcode through the scanner.

6. The barcode scanner should emit a short high-pitched beep to indicate a successful scan.

   If you do not get a beep, then check that:

   - the barcode is facing the correct direction in the slot.

   - the barcode is about ¼ - ½ inch above the bottom of the card.

   - the barcode is level with the bottom of the card or keytag.

7. Now connect the scanner Serial port to your USB/Serial Adapter or built-in Serial port on your computer.
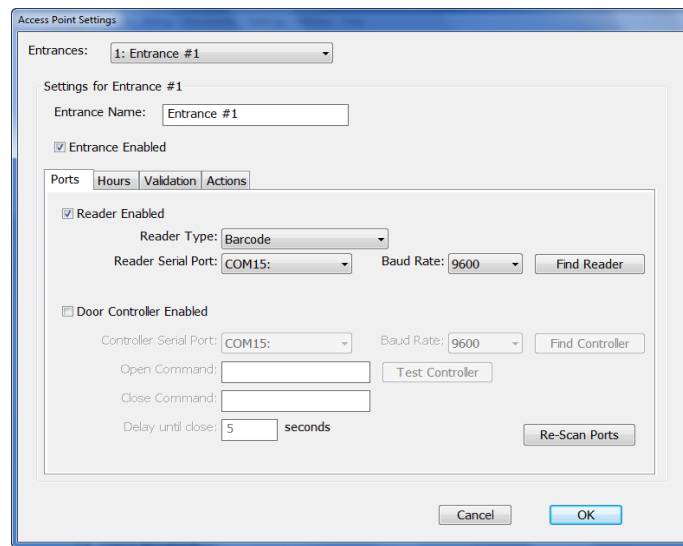
Genovation Serial Numeric Keypad

> ***Note***: *Discard the "Genovation Product Drivers" CD that came with your keypad. You will <u>not</u> need the drivers with GateKeeper.*

1. Connect the keypad serial connector to your USB/Serial Adapter or built-in Serial port on your computer.

2. The blue light will not illuminate until you click the **Find Reader** button in the next step.

Configuring Settings in GateKeeper

Port Settings

1. Start GateKeeper by one of the following methods:

    *   In Gym Assistant, select **GateKeeper** from the **File** menu.

    *   In Gym Assistant, press the **F2** key on the keyboard.

    *   Select **GateKeeper** from the **Start/All Programs** menu.

2. In GateKeeper select **Access Point / Ports** from the **Settings** menu.

3. Check the **Entrance Enabled** box.
4. Check the **Scanner Enabled** checkbox.
5. Set the **Reader Type** to **Barcode**.

    > ***Note***: *If you are connecting to a Genovation Numeric Keypad then set the Scanner Type to Genovation Keypad.*

6. Set the barcode scanner **Baud Rate** to **9600**.

    > ***Note***: *If you are connecting to a Genovation Numeric Keypad then set the **Baud Rate** to **1200**.*

7. Click **Find Reader**, then scan a card (or hit a key on the keypad).

    If the scanner is found, then the **Reader Serial Port** will be set automatically.

    If the scanner is **not** found then click the **Cancel** button and refer to the "**Serial Port Troubleshooting**" document.

Limiting Entrance Active Hours

The **Hours** tab allows you to set the times for which this entrance is active.

1. Click the "**Hours**" tab.

2. Check the **Limit Hours of Entry** box and set the time periods during which you want the door to respond to card scans.

   Note: If this entrance should be active 24/7 then leave this box unchecked.

   You can specify up to 2 time periods each day. For example, a club may allow access from **5am-10am** and then again from **10pm-1am**.

   You can specify a time period that extends into the following day. For example, weekday access from **8pm-2am** will allow access until 2am Saturday.

3. Click **Display Open/Close Hours** to show exactly when the entrance is active during all hours for the upcoming week.

   Note: This button is a good way to confirm that you have set the hours of entry correctly.

Testing the Barcode Scanner

Scan any card with the scanner (the card does not have to be attached to a member record).

If the card is not attached to a member record then the message "**Unknown Scan: 'XXXX'**" should appear. This indicates that GateKeeper has detected the card scan.
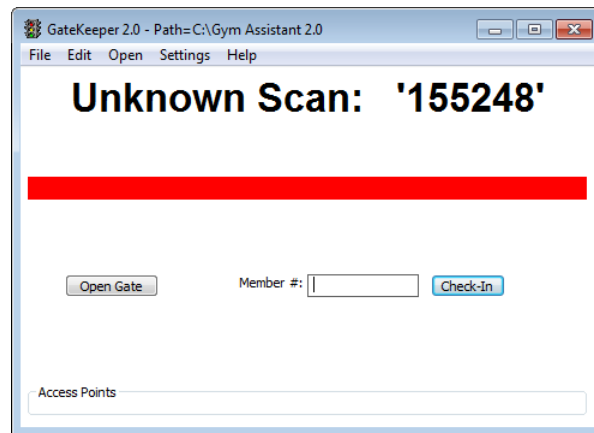
If the card is attached to a member record then the member's info should appear. This indicates that **GateKeeper** has matched the barcode to a member's record.

> ***Note***: *If either "**Unknown Scan: 'XXXX'**" or a member record shows up after the scan, your scanner is setup and working properly.*

Troubleshooting

Before You Begin

Please consider the following:

- There are <u>many</u> steps that must happen between a member scanning a card and Gym Assistant recording a visit.

- Each step in this chain of events represents a possible mode of failure.

- In diagnosing barcode problems it is very important to first identify where in the sequence the failure is happening.

- Never <u>assume</u> where the problem is occurring. Always verify.

- Never troubleshoot one step in the sequence unless you have confirmed that the previous step is functioning correctly. For example, it won't do any good troubleshooting port settings if the scanner isn't powered up or if the scanner does not beep when a barcode is read.

Is the scanner powered?

- Scanner should beep when it is powered up.
- Light on top of scanner should be **ON**.

Resolution:

Check that the power cord is attached to the scanner serial cable and plugged into main power.

Does the scanner beep when you scan a card?

- A beep indicates a successful card scan (that the scanner was able to read the barcode).
- Is scanner light on? The scanner light is the **RED** laser or **CCD** that shines on the card.

Fusion Barcode Scanner

- The Fusion scanner must be in the stand (with yellow LED lit) for hands-free scanning.
- If the Fusion is not in the stand then press the scan button on top of the scanner to scan a barcode manually.

ZBA Barcode Scanner

- If there is no beep then the scanner may need to be configured. Press the yellow scan trigger to scan a barcode manually. (See "Configuring ZBA Scanner" below.)

ID-Tech Slot Barcode Scanner:

- Try turning the card around so the barcode faces in the other direction.
- Try sliding the card in both directions.
- Try different barcodes.

Metrologic/Honeywell Serial Laser Barcode Scanner

In some cases, the **Metrologic/Honeywell** serial laser barcode scanner may need to be reconfigured to work properly with **GateKeeper** or **Pro-Shop**. The scanner configuration can be changed by scanning special codes found in the Metrologic "**Single-Line Configuration Guide**."

1. In the "**Single-Line Configuration Guide**" locate the section titled **RS-232**.
2. Set the following values by scanning the code corresponding to each setting:

Parity:	No Parity
Baud Rate:	9600
Data/Stop Bits:	8 Data Bits, 1 Stop Bit
Hardware Handshaking:	Disable RTS/CTS
Software Handshaking:	Disable XON/XOFF Handshaking

Metrologic/Honeywell Scanner and UPC Codes

If you are using the **Metrologic/Honeywell** serial scanner with **Pro-Shop**, then you may need to configure the scanner to properly format shortened **UPC** bar codes (found on some items).

1. In the Single-Line Configuration Guide locate the section titled Code Formatting: UPC/EAN Formatting.

2. Scan the code corresponding to the Expand UPC-E to 12 Digits setting.

Chapter 13 - Member Communications

Gym Assistant has many features to help you communicate with your members:

- Forms

- Letters

- Mailing Labels

- Email (forms or letters)

- Membership Cards

All of these methods can be used for a single member (e.g. print out a membership contract) or for a list of members (e.g. send past due notices). You can create multiple document **templates** for each type of communication in order to more efficiently manage your information. Each template can contain place holders for information from the Gym Assistant database either for the business (business name, business address, business phone etc.) or for members (e.g. member name, address, phone, amount due, etc.).

There is no functional difference between Forms and Letters, just that forms will be generally more structured and letters will be more free-form.

All Forms and Letters can be either printed or emailed directly to members.

## Creating and Editing Document Templates

A document template is simply a document that can contain place holders for fields in the Gym Assistant database. For example, you might include a member's name and address at the top of the document and refer to that member's next payment due date and the amount due for their next payment. Once you develop a template for a given situation (e.g. a "payment past due" letter) then you just need to send that letter to the appropriate members.

Opening a Document Template

1. Select **Edit Form Template** or **Edit Letter Template** from the **Documents** menu.

2. Gym Assistant will ask "**Do you want to create a NEW form/letter or edit an EXISTING form/letter?**"

> *Note*: *We recommend that you copy and rename one of the existing templates rather than always creating a new template from scratch.*

- Click **New** to create a new template. A new blank document will appear.

- Click **Existing** to edit an existing template. A list of existing Form or Letter templates will appear (whichever you selected from the Documents menu). Select a template to open and click **Open**.
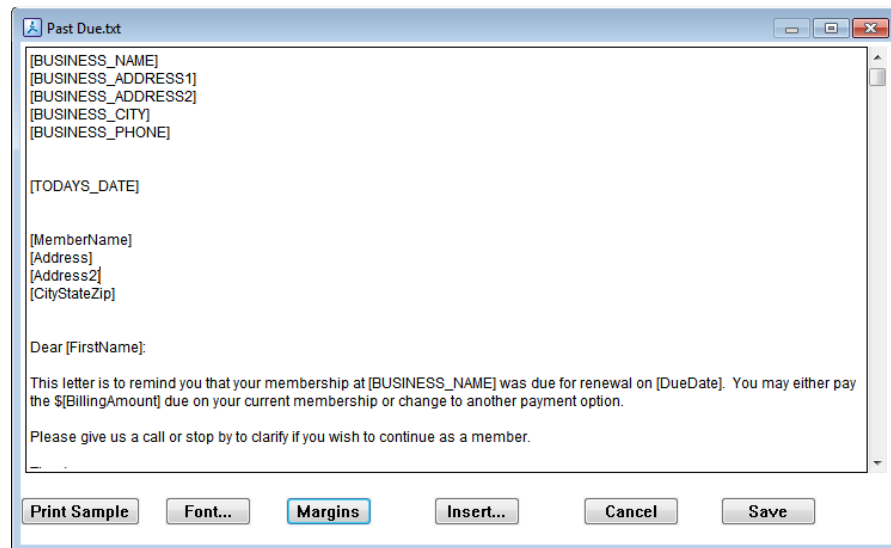
Inserting Merge Fields

Place the cursor at the desired location in the document and click **Insert**.
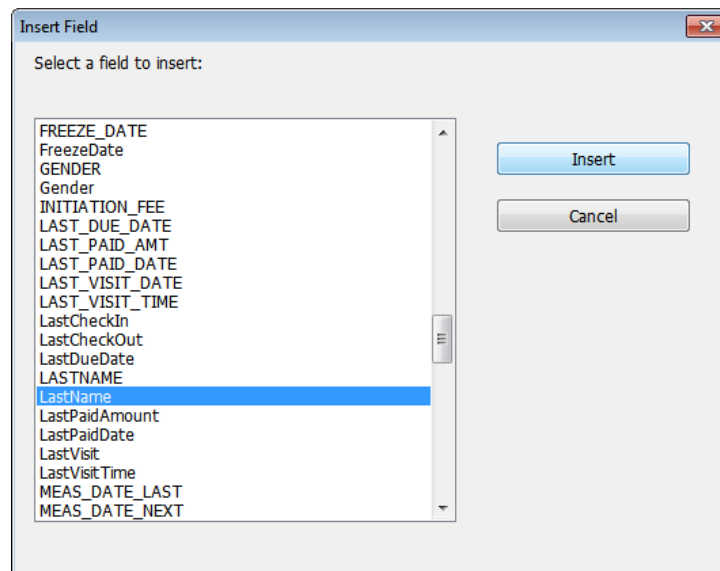
Select the desired field and click Insert. The name of the field will be inserted at the current cursor location enclosed in square brackets.

> **Note:** If you know the name of the field that you want to insert then you can simply type the field name and brackets into the documents (e.g. "[LastName]"). To change the font/size/style click **Font**.

Formatting the Document

Font Selection

Formatting for forms and letters is limited to a single font, size and style. If you want to align columns vertically by padding with blank spaces then select a mono-spaced (fixed-width) font like **Courier New**.

Margins

To change the **margins** on the printed page click **Margins**.

> ***Note:*** *Emails will be sent as plain text, so any Font or Margins changes will not affect emails sent.*

To view/print a sample of the letter click **Print Sample**. The letter will be generated with sample member data and printed automatically.

Printing or Sending a Document for a Single Member

Printing a Membership Contract

To print the default membership contract select **Print Contract** from the **Member / Documents** menu.

> ***Note:*** *The default contract form is found at "Forms\Contract.txt". To print an alternate contract form see "Printing a Form or Letter" below.*
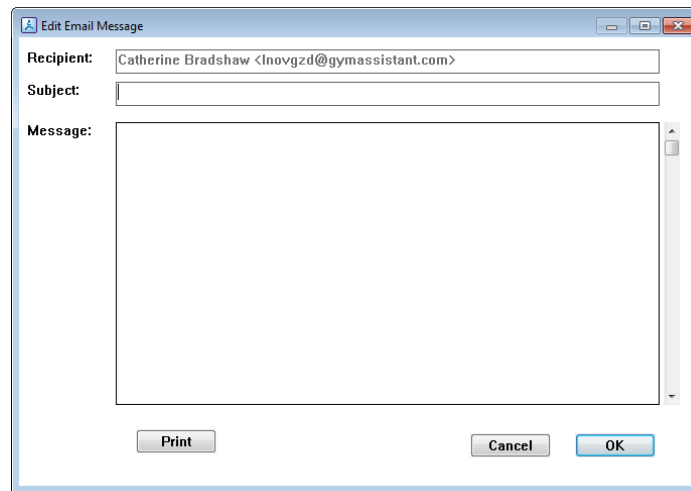
To print an alternate contract see "Printing a Form or Letter: below.

Printing a Form or Letter

1. Select Print Form or Print Letter from the Member / Documents menu.
2. Select a form or letter template from the list then click **Open**.
3. The merged document will be displayed. Click Continue to print the document.
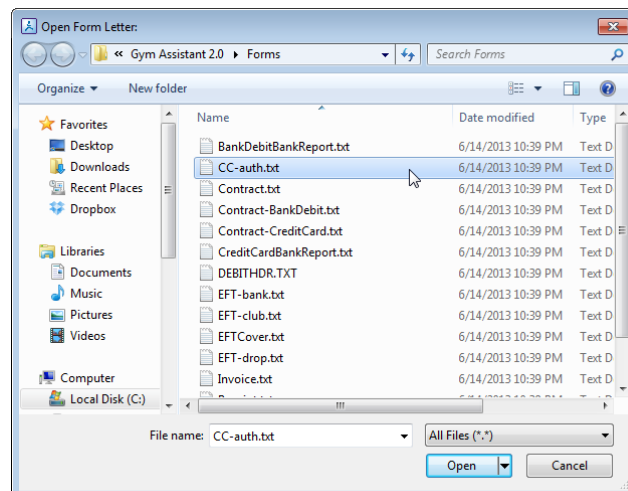
Creating a New (blank) Email

Select **Send New Email** from the **Member / Documents** menu.

Enter a Subject and Message, then click OK to send the email message.

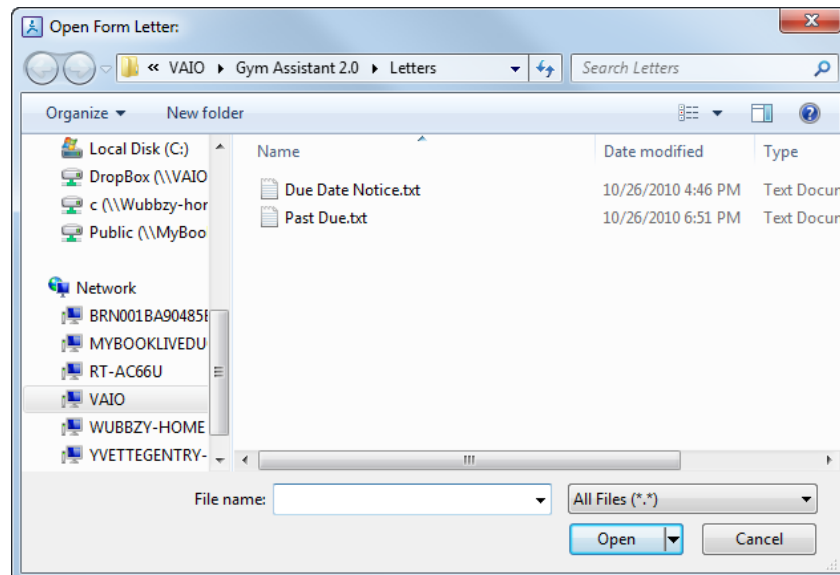## Emailing a Form or Letter

1. Select Print Form or Print Letter from the Member / Documents menu.

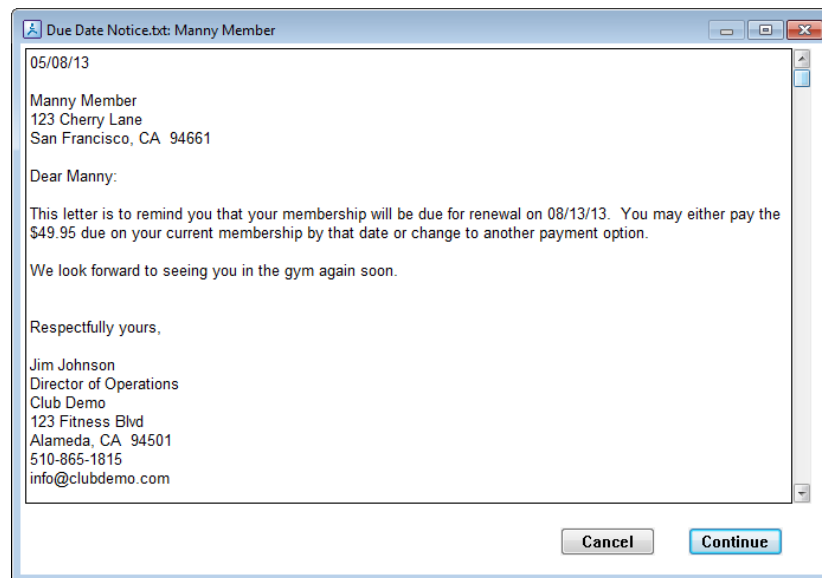2. Select a form or letter template from the list.

To send a mail merge document to the currently-displayed member select one of the options from the **Member / Documents** menu:

- **Print Contract** – This is a convenient way to print the document called "**Contract.txt**"

- **Print Form** – Select a document from the Forms folder to print.

- **Print Letter** – Select a document from the Letters folder to print.

- **Print Invoice** – Print an invoice showing the current due charges for a specified billing date.

- **Print Membership Card** – Print membership card for this member.

- **Send New Email** – Create new empty email to send to member.

- **Email Form** – Select a document from the Forms folder to email.

- **Email Letter** – Select a document from the Letters folder to email.

When sending a form or letter a window appears to select a form or letter template.
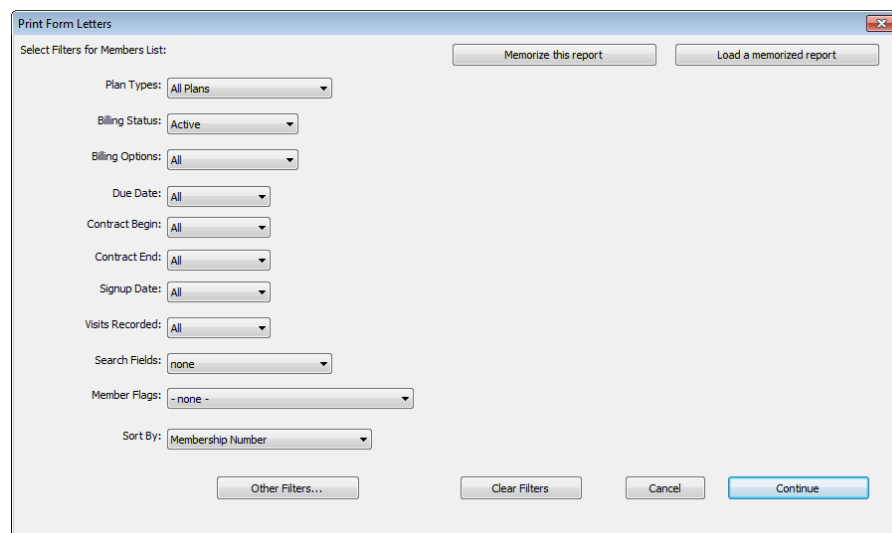

Select a template file and click **Open** to open the file.

Due Date Notice.txt: Manny Member

05/08/13

Manny Member
123 Cherry Lane
San Francisco, CA 94661

Dear Manny:

This letter is to remind you that your membership will be due for renewal on 08/13/13. You may either pay the $49.95 due on your current membership by that date or change to another payment option.

We look forward to seeing you in the gym again soon.

Respectfully yours,

Jim Johnson
Director of Operations
Club Demo
123 Fitness Blvd
Alameda, CA 94501
510-865-1815
info@clubdemo.com

Cancel   Continue

Click **Continue** to print the letter.

Printing or Emailing a Document for Many Members

1. Select one of the following items from the **Member / Documents** menu:

   - Print Forms

   - Print Letters

   - Email Forms

   - Email Letters

2. Select a form or letter template from the list then click **Open**.

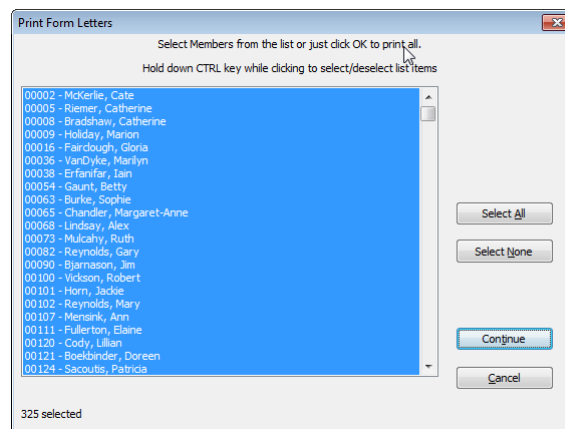3. A sample merged document will be displayed. Click **Continue**.

4. Specify the filters desired then click **Continue**.

   > ***Note***: *If you are emailing the documents, then only members with a valid email address will appear in the list.*

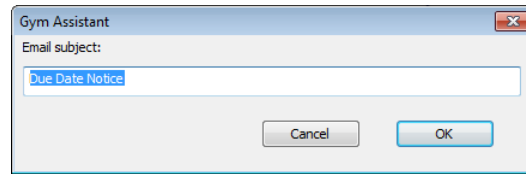5. You can now further edit the list of members to receive the document.

Select or unselect members in the list by holding down the CTRL key while clicking.

6.

7. be asked to enter a **Subject** for the

Printing Invoices

Invoice Settings

To change basic invoice settings select **Invoices** from the **Setting**s menu.

- Check **User Business Info settings for Remittance Info** to copy your business information (from Settings/Business Information) into the invoice remittance fields.
- Set a Message to appear at the bottom of invoices.

Editing the Invoice Layout

A member invoice is a special form letter that includes information about payments due for a member.

1. Select **Edit Form Template** from the **Documents** menu.

2. Click **Existing** and open document "Invoice.txt".

3. Note that the invoice template includes the special space holders for [INVOICE_INFO] and [INVOICE_MESSAGE]. When an invoice is printed the payment info will replace the [INVOICE_INFO] text, and a custom message will replace the [INVOICE_MESSAGE] text.

4. You can edit the remittance info by selecting "Invoices" from the Settings menu.

> ***Note***: *The default invoice template is formatted to tri-fold and place in a windowed envelope. You may need to adjust the formatting to align the addressed with the windows on your envelopes.*

Printing a Single Invoice

1. Select **Print Invoice** from the **Member / Documents** menu.
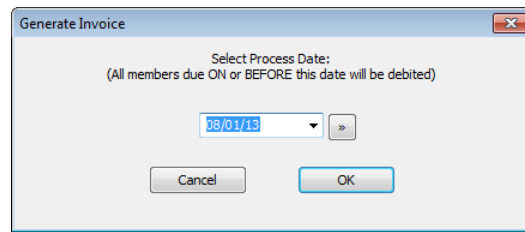
2. Specify a Process Date for the invoice. All charges due on or before the Process Date will appear on the invoice.

   - Enter a date manually.

   - Click the list triangle to select a processing date.

   - Click the calendar [»] button to select a date from the calendar.

Printing Multiple Invoices

1. Select **Print Invoices** from the **Billing** menu.
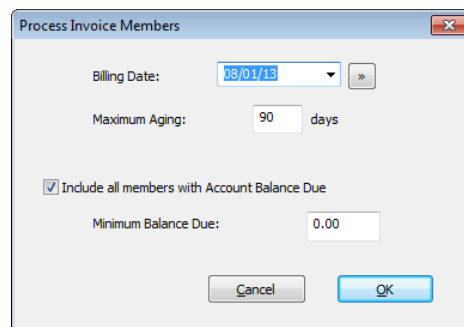
Billing Date: All charges due on or before the Process Date will appear on the invoice.

Maximum Aging: Allows you to filter out members who are delinquent by more than a few months.

   - For example, you might not want to bill members who are more than 3 months past due.

   - If you specify a Maximum Aging of 90 days then members who are due more than 90 days before the Billing Date will not be included in the list.

Include all members with Account Balance Due: Allows you to include any member with a balance due even if that member does not have a membership payment due.

   - For example, a club might allow members to charge retail purchases to their member accounts for later payment. They could run the billing weekly to collect for the retail balances owed.

2. Click **OK** to continue.
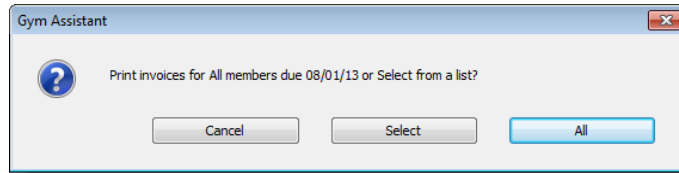
3. Click **All** to print invoices for all members due, or click **Select** to filter the list.

   If you click Select then the **Select Filters for Members List** window will appear.

   Specify filters to refine the list, then click **Generate Invoices** to continue.

   In the Select Members to Invoice window select or unselect members in the list by holding down the CTRL key while clicking. Click OK to continue.

4. The list of selected members will appear.

```
Invoice List   [Club Demo 07/17/13]                                                    [_][□][✕]

Member  Member              Membership          Billing   Billing      Billing      Due        Total
Number  Name                Type                Status    Option        Amount      Date         Due
-----------------------------------------------------------------------------------------------------
     5  Riemer, Catherine       $71 Walk-In-And-Pay   ACTIVE   Monthly        71.00   * 03/10/12    79.52
     8  Bradshaw, Catherine     Independent           ACTIVE   Monthly        65.00     07/25/13    72.80
     9  Holiday, Marion         $71 Walk-In-And-Pay   ACTIVE   Monthly        71.00   * 04/26/12    79.52
    82  Reynolds, Gary          2009-2010 Early Pay   ACTIVE   Monthly        61.91   * 12/30/12    69.34
   100  Vickson, Robert         2009-2010 Early Pay   ACTIVE   Monthly        61.91   * 12/31/11    69.34
   162  Munro, Diane            On Track 1 year lump  ACTIVE   Monthly        64.00   * 09/20/12    71.68
   200  Prescott, Catherine     On Track 1 year lump  ACTIVE   Monthly        64.00   * 08/19/12    71.68
   234  Beckett, Constanta      On Track 1 year lump  ACTIVE   Monthly        64.00   * 08/19/12    71.68
   309  Milroy, Carol           Non-Member All Class  ACTIVE   Monthly        99.00   * 04/01/12   100.94
   455  Warick, Maureen         12 Month LumpPay $59  ACTIVE   Annual        719.88   * 02/15/13   806.27
   531  Peacey, Barbara         $45 special           ACTIVE   Monthly        40.17   * 04/02/12    44.99
   542  Boittiaux, Gill (pronoun $71 Walk-In-And-Pay  ACTIVE   Monthly        71.00   * 06/01/12    79.52
   584  Chatterton, Deborah     $64/mo Special 1 yr   ACTIVE   Annual        768.00   * 02/21/13   860.16
   588  Barber, Sharon          $75 Independent Clie  ACTIVE   Monthly        75.00   * 04/26/12    84.00
   610  Schultz, Doug           2009-2010 Early Pay   ACTIVE   Monthly        68.57   * 05/25/12    76.80
   631  Potash, Eva             ON TRACK PLUS Classe  ACTIVE   Monthly        99.00   * 03/01/12   110.88
   645  Headen, Nan             $71 Walk-In-And-Pay   ACTIVE   Monthly        71.00   * 05/17/12    79.52
   653  Marsh, Martti           $64/mo Special 1 yr   ACTIVE   Annual        768.00   * 04/04/13   860.16
   834  Phillips, Nancy         MET 1                 ACTIVE   1-Day          80.00   * 04/23/12    89.60
   926  Walls, Ellen            $71 Walk-In-And-Pay   ACTIVE   Monthly        71.00   * 05/17/12    79.52
  1094  Adams, Bill             $71 Walk-In-And-Pay   ACTIVE   Monthly        71.00   * 05/05/12    79.52
  1107  Cerminara, Lynne        $64/month 6MONTH LUM  ACTIVE   Semi-Annual   384.00   * 04/01/12   430.08
  1108  Crossfield, Janet       $64/month 6MONTH LUM  ACTIVE   Semi-Annual   384.00   * 04/01/12   430.08
  1202  Callow, Helen           MET 1 Discounted $65  ACTIVE   1-Day          65.00   * 06/07/12    72.80
  1204  Vickson, Glenn          Drop In OLD           ACTIVE   1-Day          10.00   * 03/04/12    11.20
  1250  Lalonde, Shirley        Special PT 3x week    ACTIVE   7-Day          75.00   * 03/22/12    84.00
  1262  Rouzault, Sharon        Vibration Training 1  ACTIVE   Monthly        39.00   * 05/08/12    43.68
  1275  Sweline, Linda          $ 69 Independent Cli  ACTIVE   Monthly        69.00   * 04/19/12    77.28
  1283  Scobie, Eva             $71 Walk-In-And-Pay   ACTIVE   Monthly        71.00   * 05/01/12    79.52
  1297  Fisher, Mike            Nia 16 punch pass     ACTIVE   5-Month       128.00   * 07/11/12   143.36
  1306  Moir, Evelyn            $ 69 Independent Cli  ACTIVE   Monthly        69.00   * 12/22/12    77.28
  1314  Dorrance, Jack          $71 Walk-In-And-Pay   ACTIVE   Monthly        71.00   * 05/08/12    79.52
  1324  Jacobson, Kathleen      MET 1                 ACTIVE   1-Day          80.00   * 04/06/12    89.60

Search Criteria:

  Membership Types:  All
    Billing Status:  Active
   Billing Options:  Annual, Semi-Annual, Quarterly, Monthly, 5-Month, 1-Day, 4-Day, 7-Day, 2-Week
          Due Date:  Between 02/13/11 and 08/01/13

Sorted by:  Membership Number

33 matches found

       [ Print ]      [ Save ]      [ Copy ]        [ Edit ]        [ Cancel ]      [ Print Invoices ]
```
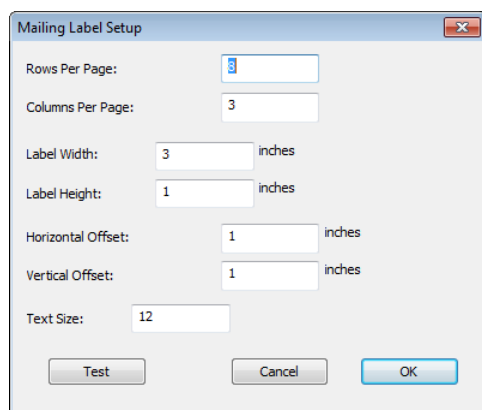
5. Click **Print Invoices** to print the invoices.

Printing Mailing Labels

Gym Assistant can print mailing labels to send to your members.

Mailing Label Settings

Select **Mailing Labels** from the **Settings** menu.

Rows Per Page	Number of label rows (down) on a page
Columns Per Page	Number of label columns (across) on a page
Label Width	Horizontal distance from one label to the next label
Label Height	Vertical distance from one label to the next label
Horizontal Offset	Horizontal distance from left edge to first label
Vertical Offset	Vertical distance from top edge to first label
Text Size	Text size for labels
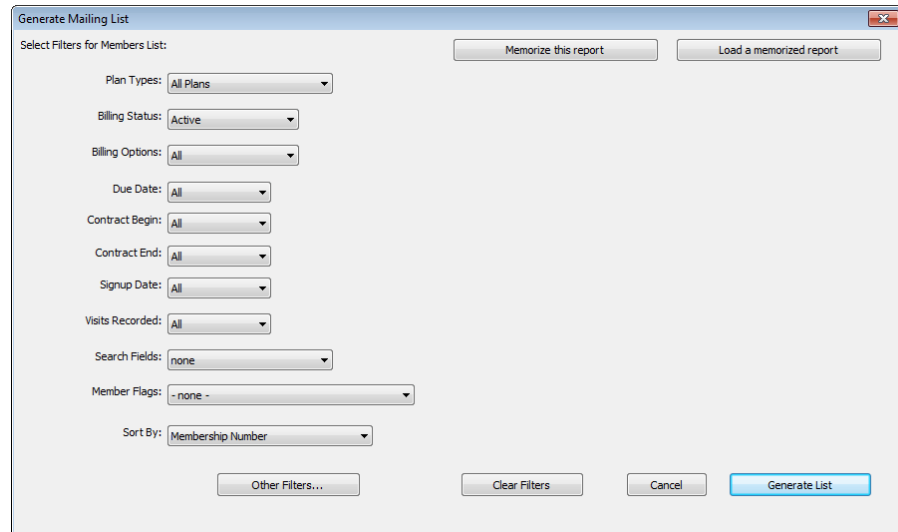
Click **Test** to print a test page.

Printing the Labels

1. Select Print Mailing Labels from the Documents menu.

2. Set filters to generate a membership list as needed.

> ***Note***: *Please refer to Reports / Members List Reports for details about creating a filtered list of members.*

3. Select or unselect members in the list by holding down the CTRL key while clicking, or click Select All.

4. Click OK to continue. The list of members will appear.

```
Mailing Labels To Process   [Club Demo 10/08/13]

Member  Member                  Membership      Billing    Billing         Billing    Due
Number  Name                    Type            Status     Option          Amount     Date
-----------------------------------------------------------------------------------------------
     1  Member, Manny           Club            ACTIVE     Credit Card      49.95    * 08/13/13
     2  Redding, Diana          Club            ACTIVE     Credit Card      49.95    * 09/30/13
     3  Landers, Larry          College         ACTIVE     3-Month EFT-B    40.00      02/17/14
     4  Horowitz, David & Emmy  Add On Child    ACTIVE     Monthly          25.00    * 06/17/13
     5  Wetanson, Peggy         Add On Child    ACTIVE     Monthly          25.00  d * 03/15/13
     6  Rademacher, Negeen      Add On Child    ACTIVE     Credit Card      25.00    * 09/25/13
     7  Kanes, Kristin          Club            ACTIVE     Monthly          49.95  d * 05/01/13
     8  Prodger, Stanley        Club            ACTIVE     Credit Card      49.95    * 05/01/13
     9  Griswold, Sunny, Simrun, Club           ACTIVE     ACH              49.95    * 03/21/13
    10  Bates, Leslie           Add On Child    ACTIVE     Monthly          25.00    * 03/10/13
    11  Spence, Andy            Club            ACTIVE     Credit Card      49.95    * 03/20/13
    12  Bock, Kevin             Club            ACTIVE     Monthly          49.95    * 05/01/13
    13  Bar, Ali                Add On Child    ACTIVE     Credit Card      25.00  d * 05/01/13

     Print       Save       Copy            View        Cancel         Print Labels
```

5. Click Print Labels.

Printing Membership Cards

Gym Assistant can print membership cards for members, either one at a time on single sheets of paper or as a batch with multiple cards on one sheet.

Single cards can be printed on plain index cards with the card outline printed on the paper, and you then cut out the card outline.

Multiple cards can be printed on pre-scored business card stock.
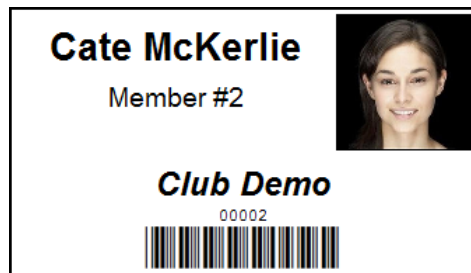
Membership Card Settings

The format of the card can be slightly customized. Select **Membership Cards** from the **Settings** menu.
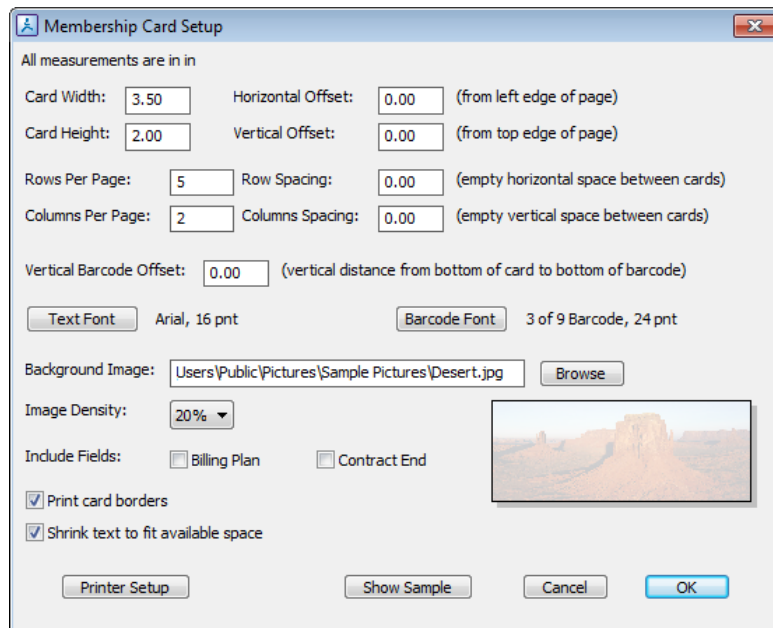
Note: *All measurements are displayed using the units (inches or mm) selected in Settings > Language/Date/Time.*

Card Width/Card Height: Dimensions of the card.

Horizontal/Vertical Offset: Location of top-left corner of the card.

Rows/Columns Per Page: Number of rows and columns on a page (only used when printing multiple cards on a page).

Row/Column Spacing: Empty space between cards (only used when printing multiple cards on a page).

Vertical Barcode Offset: The vertical distance between the bottom of the card and the bottom of the barcode.

Text Font: The font and size for text displayed on the card.

Barcode Font: The font and size for the barcode displayed on the card,

Background Image: The path to an image file to display in the background of the card. The image will be scaled to fit above the barcode, since the barcode requires a white background.

Image Density: How densely to print the background image, 0-100%. A higher value displays a more vivid image, a lower value displays a lighter (more washed-out) image.

Include Fields: Additional fields (Billing Plan name and Contract End date) that can be displayed on the card.

Print card borders: Check this box to print the border of the card.

Shrink text to fit available space: Check this box to optimize text size to fit on the card.

Printing a Membership Card for a Single Member

To print a membership card for the displayed member, select **Print Membership Card** from the **Member / Documents** menu.

The membership card will be displayed for preview. Click Print.

Printing Membership Cards for Multiple Members

To print membership cards for multiple members, select **Print Membership Cards** from the **Documents** menu.
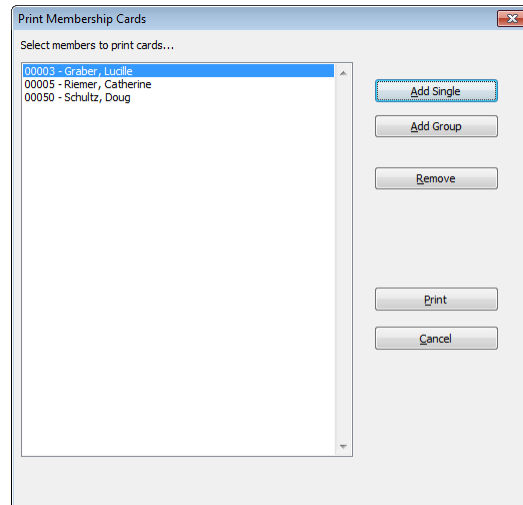
Create a list of members to print.

Click **Add Single** to add individual members. Enter a membership number or name to lookup a member to add to the list.

Click **Add Group** to add a group of members. The Print Membership Cards window will appear to select a set of filters to create the list. This window is the same as the Members Detail Report window.

Click **Remove** to remove the selected entries from the list.

- CTRL + Click on an entry to toggle the selection of an entry.
- SHIFT + Click to select a range of entries in the list.

Click **Print** to print membership cards for all members in the list.

Chapter 14 - Utilities

The Utilities menu includes some features that are not easily categorized in other parts of the program.

Sell Day-Pass to Non-Member

You may want to sell single-use passes to non-members. For example, you might allow members to bring in a guest for a fee, or you might allow walk-in visits. The day-pass fee is recorded without entering the visitor into the Gym Assistant database, and a day-pass visit is recorded automatically.

1. Select **Sell Day-Pass to Non-Member** from the **Utilities** menu.
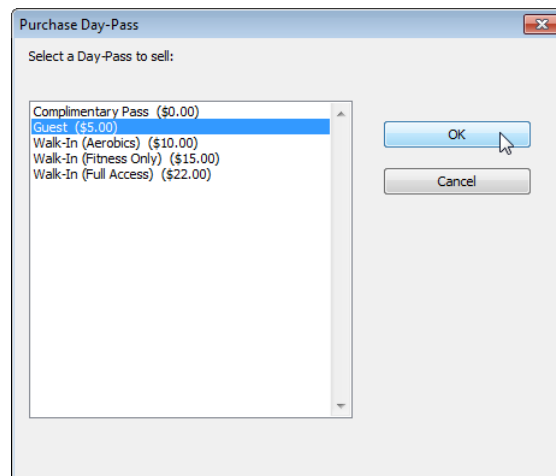
2. Select the type of day-pass from the list and click OK.
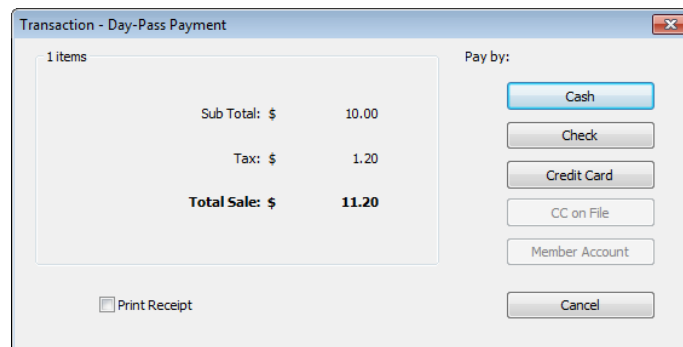
Reprint Last Receipt

Select **Reprint Last Receipt** from the **Utilities** menu to print a receipt from the last purchase.

Only the most receipt can be reprinted directly.

To reprint an earlier receipt:

1. Click **Journal History** while viewing a member record … or …
   Select **Journal Detail** from the **Reports** menu to view a list of all transactions, or

2. Specify the date range for the transaction list.

3. Right-Click on the desired transaction and select **Reprint Receipt**.

Reprint Last CC Receipt

Select **Reprint Last CC Receipt** from the **Utilities** menu to print the last credit card receipt.

Only the most recent credit card receipt can be reprinted.

Open Cash Drawer

Select **Open Cash Drawer** from the **Utilities** menu to open the cash drawer. See "Cash Drawer Settings" for more information about setting up your cash drawer.

Check-In Family Members

The Check-In Family Members feature makes it easy to check-in multiple members in the same family.

1. With a member displayed select **Check-In Family Members** from the **Utilities** menu, or press the **F6** key on the keyboard.

   The Family Check-In window will appear listing all members who are linked to the currently-displayed member.
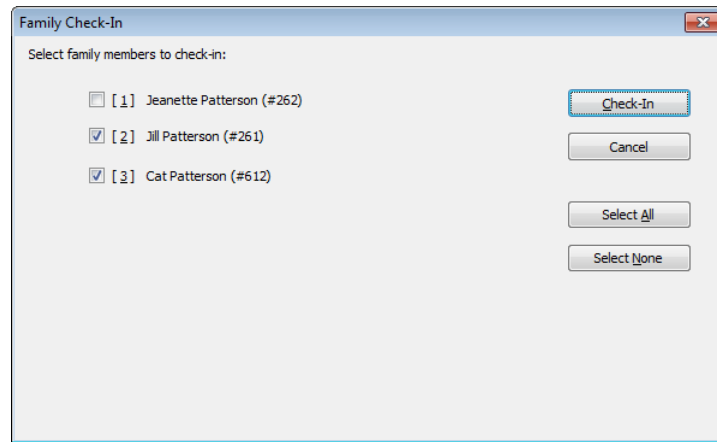
2. Check the boxes for family members who are checking in by doing any the following:

    - Click the check box or the member's name.

    - Press the number key on the keyboard (1, 2, etc.).

    - Click **Select All**.

3. Click Check-In or press the ENTER key to finish and record the visits.

Pro-Rate Calculator

The Pro-Rate Calculator can be used to quickly calculate payments for partial billing periods. For example, you might want to calculate the payment needed to cover dues from today until the end of the month.

1. Select Pro-Rate Calculator from the Utilities menu.
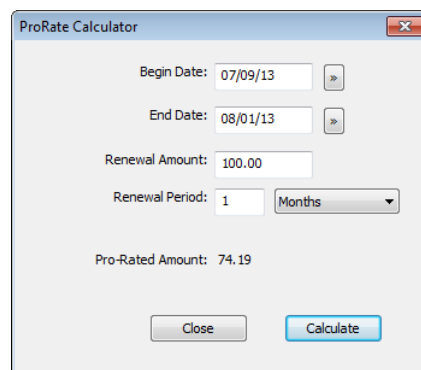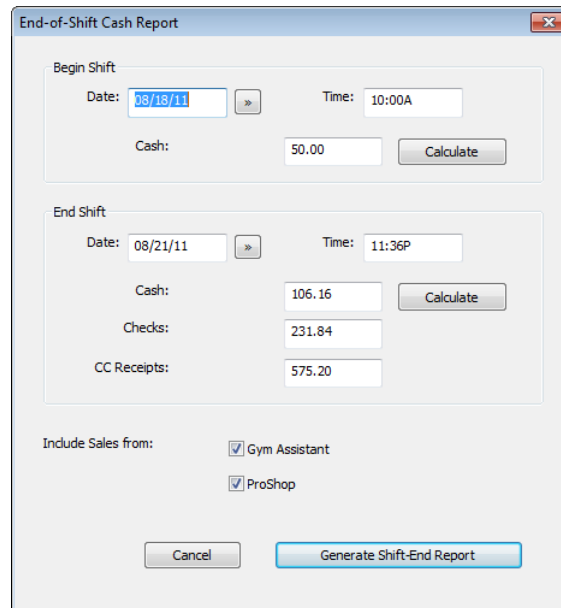
2. Enter the **Begin Date** and **End Date** for the time to be billed.

3. Enter the **Renewal Amount**, which is the standard amount due for a full billing period (e.g. the monthly or annual payment).

4. Enter the **Renewal Period**, which is the standard billing period length (e.g. 1-month or 6-months).

5. Click **Calculate**.

End-of-Shift Z-Report

The End-of-Shift Z-Report can help you reconcile the cash drawer and receipts at the end of the day or the end of a shift. Gym Assistant will calculate the total sales over the shift and reconcile sales with the amount left in the register.

Entering Z-Report Values

1. Select **End-of-Shift Z-Report** from the **Utilities** menu.

2. **Begin Shift Total**

   - Enter the date/time and the amount of cash in the drawer at the start of the shift. Click **Calculate** if you need help adding up the total. (See "Calculating Cash Totals" below.)

3. **End Shift Totals**

   - Enter the date/time at the end of the shift.

   - Enter the total Cash in the drawer at the end of the shift. Click **Calculate** if you need help adding up the total. (See "Calculating Cash Totals" below.)

   - Enter the total of Checks collected.

   - Enter the total of Credit Card Receipts.

4. Check the Gym Assistant and/or ProShop boxes to include sales from each program in the report.

5. Click **Generate Shift-End Report**.

Gym Assistant will report whether the Z-Report is balanced and then display the End-of-Shift Z-Report.

```
End-of-Shift Z-Report   [Club Demo 07/18/13]

BEGIN SHIFT   08/18/11 10:00A
END SHIFT     08/21/11 11:36P

Report Generated 07/18/13 12:06A


                  OPEN       SALES  NUM      CLOSE         DIFF
                 ------      ------ -----   ------        ------
CASH              50.00       56.16   4      106.26       +0.10     (over)
CHECKS             0.00      231.84   3      231.84        0.00     -OK-
CC                 0.00      575.20  10      575.20        0.00     -OK-

TOTAL             50.00      863.20  17      913.30       +0.10     (over)
```

If there are any discrepancies in the totals they will be displayed as OVER (too much in the register) or UNDER (not enough in the register). You will then be allowed to go back and correct the report if desired.

Calculating Cash Totals

If you need help counting cash totals while entering the Z-Report values click **Calculate**. The Cash Calculator window will appear.

Value	Qty	Total
100	0	0.00
50	0	0.00
20	3	60.00
10	2	20.00
5	3	15.00
1	10	10.00
.25	3	0.75
.10	3	0.30
.05	1	0.05
.01	6	0.06
Other	0.00	0.00
	Total:	106.16

Enter the number of bills and/or coins of each denomination, and the total will be calculated automatically.

Who's Here?

The **Who's Here?** Report will display a list of members who are currently on-site. Please see "Miscellaneous Topics" for more information on member check-out and visit duration.
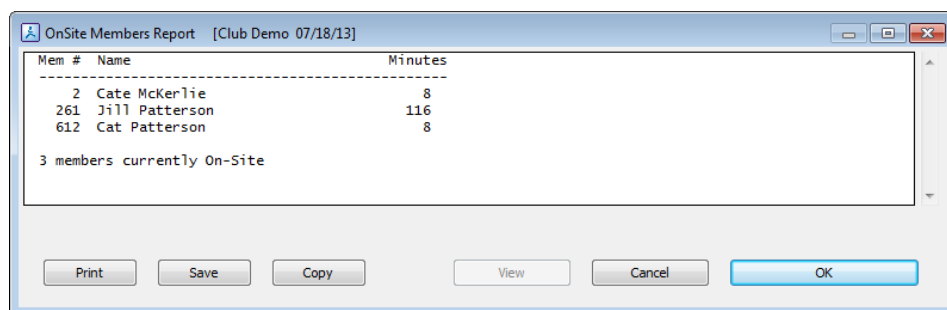
The Who's Here report will assume that a member is still on-site until a

(incomplete)

Show Email Queue Manager

Gym Assistant utilizes an internal email queue system that allows emails to be sent quietly in the background. While emails are being sent the Email Queue Manager will appear in the lower-left corner.
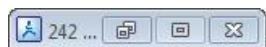
If there are no emails in the queue then the Email Queue Manager will not appear.

To view the Email Queue select **Show Email Queue Manager** from the **Utilities** menu.
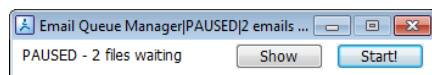
Click **Show** to view the list of emails in the queue.

Click **Pause** to pause sending emails, or click **Start** to resume sending emails.

Submit KeyFinder Info

If you have purchased custom keytags then they probably have your facility's contact information somewhere on the them. If a member loses her keys and someone finds them, then most often the person who finds the keys will call the phone number on the keytag. You can then lookup the barcode number on the tag to find the owner of the keys.

For those facilities who purchase Gym Assistant logo keytags, however, the person that finds the keys will most likely call us. KeyFinder provides a way for us to identify the club that purchased the keytag, which helps us to connect the keys with their owner who lost them.

KeyFinder sends information to us about the range barcode numbers in use at your facility. No member information is transmitted, only barcode numbers.

If you have not purchased Gym Assistant logo keytags then you do not need KeyFinder.

To Submit your KeyFinder information to Gym Assistant select **Submit KeyFinder Info** from the Utilities menu.

Special Features
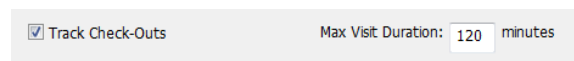
Special Features are rarely-used utility functions. They are put in a special place so as not to burden you with extra features for day-to-day operations.

Chapter 15 - Miscellaneous Topics

Recording Member Check-Out

Gym Assistant can record member check-out either manually (by staff at the front desk) or with a second barcode reader.

To enable tracking of member check-outs select **Program Options** from the **Settings** menu.
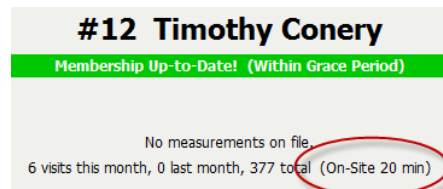
Check the **Track Check-Outs** checkbox.

Set the **Max Visit Duration** (minutes) to be the maximum length of time for which you consider a member to be "on-site".

After a member checks in, the current length of time for his visits will be displayed:

He will be considered "on-site" for the time interval that you specify in **Max Visit Duration** (above). During that time (or until he checks out) the "Check-In" button in the Member Info window will be labeled "Check-Out".

To manually check-out a member click the "Check-Out" button.

Data Backup and Restore

Gym Assistant provides multiple methods to backup your data:

- Manual backup to external disk
- Online backup to the GymAssistant.com web server
- Automatic daily Archive backup to disk

A Few Words About Disaster Recovery

You should setup and maintain backup systems for all of your data to avoid losing important business information in the event of a hard disk failure (the most common cause for data loss), fire, flood or theft.

Here are some guidelines for keeping your data safe:

- **Fact**: The average life span of a hard drive is 3-5 years. There is a very good chance that your hard drive will fail during the life of your computer.
- Your hard disk **will** fail, so be prepared!
- **Always** backup data to a location other than where you store your data, so that if your main hard drive fails your will have backup data from which to restore.
- **Never** rely on only one form of backup. Murphy's Law has been proven on many occasions -- Any backup system will fail at the worst possible time!
- **Always** move a backup of your data offsite at the very least every few weeks. If your facility burns or floods you want to make sure that you have your data safely stored in another location. This can be online, in another building or even at home.

Backup Settings

Select Backup and Restore from the Settings menu.
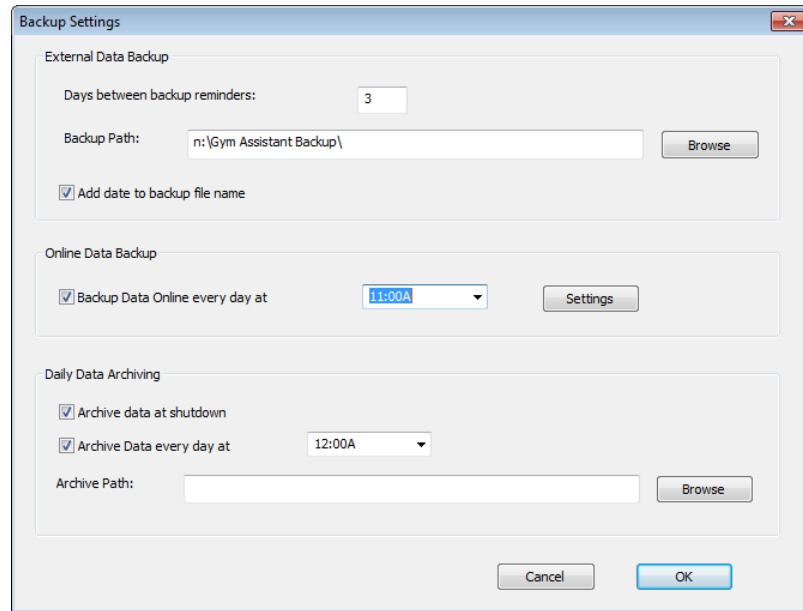
External Data Backup

You should regularly backup your data to some form of external drive. The simplest and cheapest external drive is a basic USB Flash Drive (purchased from any computer or office supply store). The smallest flash drive you can buy should be able to store hundreds of Gym Assistant data backups. Just backup regularly to a flash drive:

- Always remove the flash drive from the computer, in case the computer is stolen or damaged physically.

- Occassionally take the flash drive home and copy the most recent backup to your home computer for safekeeping, or even email a copy of the most recent backup to yourself.

Days between backup reminders: This value determines how often Gym Assistant will remind you to backup your data. Set it to something less than 1 week. If you have a system to automatically backup files to another location (such as a server) then you can set this value up to 99 days.

Backup Path: Sets the default path for manual backups. Backups should always be placed on a different drive from your main data so that if your main drive fails you will still have a backup elsewhere.

Add date to backup file name: Keep this box to ensure that each backup file has a different name. If this box is unchecked then each backup will replace the previously backup, and you will not have the option of restoring from a particular date.

Online Data Backup

Gym Assistant can upload a backup of your data (excluding photos) to a secure area of the GymAssistant.com web server (in "the cloud"). Online backup utilizes Online Connect, which is provided free-of-charge while your software is within annual maintenance period.

Note only one online backup file is permitted, so each online backup will replace the previous online backup.

Backup Data Online every day at: Check this box to enable automatic daily online backup.

Set the daily time to a period when you know that the computer will be in-use, best when your facility usage is low … say 11am or 1pm. The online backup process will happen automatically, but it will interrupt operations for 5-10 seconds while the backup is created and uploaded.

> *Note*:   *Gym Assistant will only backup online automatically if the computer is ON and Gym Assistant is running.*

Click **Settings** to setup **Online Connect**.

Daily Data Archiving

Gym Assistant will automatically make a daily backup of your data. The program archives a daily "snapshot" for each of the past 90 days. Each archive backup contains all of your member data and logs, excluding photos. The archive backups are by default stored in the same folder as your member data.

Archive Data at Shutdown: If this box is checked then Gym Assistant will automatically create an archive backup when you exit the program each day.

Archive Data Every Day at: If this box is checked then Gym Assistant will automatically create an archive backup at the same time each day. Set a time at which you would like the automatic archive backup to begin. Note that the archive backup takes only a few seconds.

For optimal archiving, we recommend that you check both of these boxes.

Additional/Alternative Backup Methods

In addition to the backup methods included in Gym Assistant you might also consider the following alternatives:

- **Online Backup Services** -- such as **Carbonite.com** and **Mozy.com** provide automatic online backup of your computer data. You should setup the service to backup at a specific time interval (e.g. every 6 hours) rather than continuously, because continuous backup can cause problems with Gym Assistant trying to modify data files while they are being backed up.

- **Backup to a Server** – If your business or organization has access to a file server that is regularly backed up then you can either (a) locate your data on that server, or (b) setup Gym Assistant to automatically backup your data to that server.

- Backup to Another Computer – Just copy your most recent backup file occasionally to another computer on your network. If your main computer hard drive dies then you've got a backup immediately available for restore.

Chapter 16 - Settings

Settings - Preferences

Program Options

Program Options determine basic settings for the application.
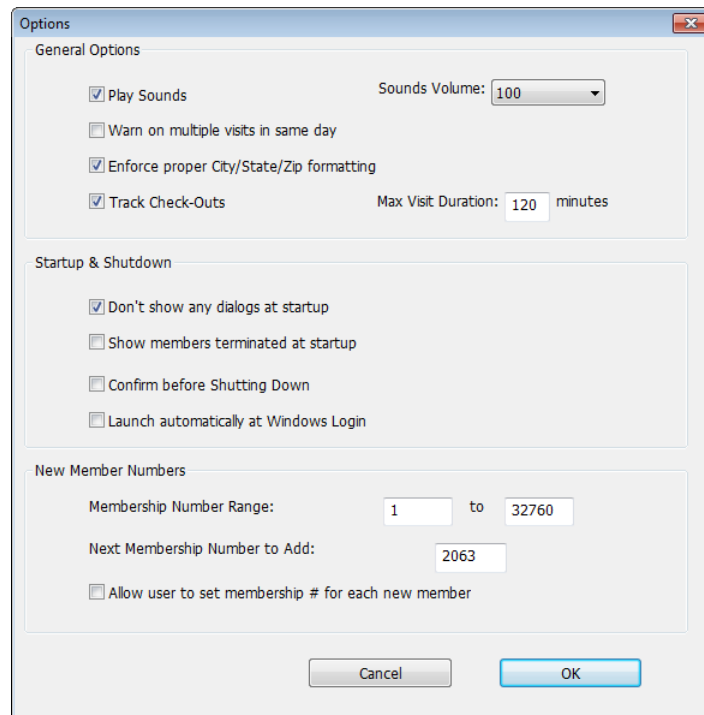
Play Sounds – Check this box to play the "ping" and "buzz" sounds when members check in.

Sounds Volume – This control sets the volume for check-in sounds.

Warn on multiple visits in same day – Check this box to have Gym Assistant warn you when you try to manually record a 2nd visit for a member. This can prevent you from accidentally manually entering duplicate visits.

Enforce proper City/State/Zip formatting – If this box is checked then the member City/State/Zip field must be formatted with a comma after the city and the state and zip must be entered.

Track Checkouts – If this box is checked then member check-outs can be recorded.

Max Visit Duration – This is the default visit length for members who do not check-out. Once a member checks in they will be considered "on-site" for this many minutes unless she checks out. (See "Who's Here? Report" below.)

Don't show dialogs at startup – Check this box to have Gym Assistant start more quickly.

Show members terminated at startup – When Gym Assistant starts it automatically scans the database to see if any members should be terminated, frozen or unfrozen. Check this box to have the program display a report at startup if any of these actions were taken.

Confirm before Shutting Down – Check this box to have the program confirm if you really want to quit. This can prevent accidentally exiting the program.

Launch Automatically at Windows Login – Check this box to have Gym Assistant start automatically when you login into Windows.

Membership Number Range – The maximum membership number allowed is 32,000 but you can set an explicit range of available membership numbers. This might be useful, for example, if you have barcode keytags with numbers 1, 2, 3, etc. and want to ensure that your membership numbers do not overlap with your keytag numbers.

Next Membership Number to Add – This value specifies the next membership number to add. If this number has already been used then the program automatically looks to higher numbers until an unused number is found.
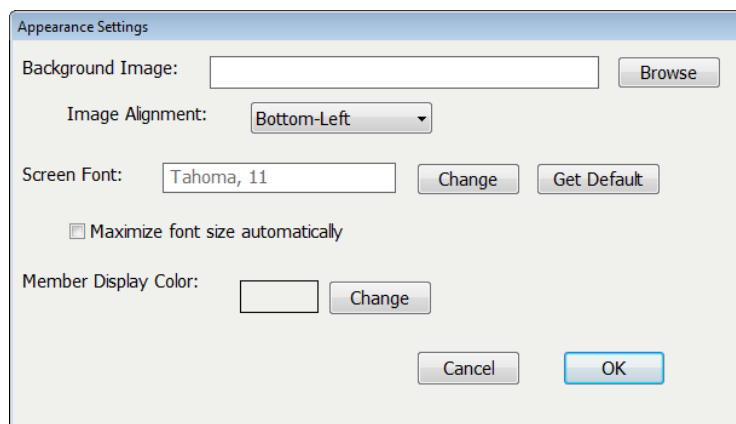
Allow user to set Membership # for each new member – Check this box if you want users to be able to override the automatically-generated membership numbers. This might be useful, for example, if you are entering existing members into the system and want to retain their current membership numbers.

Automatic Updates

Please see "Basic Settings / Automatic Updates" for detailed information on this topic.

Appearance

Gym Assistant allows you to customize the look of the program.

Appearance Settings

Background Image:	[ ] Browse
Image Alignment:	Bottom-Left ▼
Screen Font:	Tahoma, 11 Change Get Default
☐ Maximize font size automatically	
Member Display Color:	[ ] Change
	Cancel OK

Background Image – Click Browse to select a picture for the Gym Assistant background. If you do not select an image (or clear the Background Image text) then the Gym Assistant logo will be used.

Image Alignment – Specifies where and how the background will appear. The choices are:

- Bottom-Left: Image placed in lower-left corner, not scaled.

- Center: Image placed at center, not scaled.

- Fill: Image reduced or enlarged to fit the screen. A black band will fill any empty space at the top/bottom or left/right edges.

- Scale: Image stretched in both directions to fill the screen.

- Tile: Unscaled imaged is repeated to fill the screen.

Screen Font –

- Click **Change** to set the font (family, size and style) for Gym Assistant.

- Click **Get Default** to set the default font automatically sized for your display.

Maximize Font Size Automatically – Check this box to have the program automatically scale the selected screen to your display at startup. You may need to uncheck this box if the automatic scaling results in some windows being too large for your display.

Member Display Color / Change – Click **Change** to set the background color for the View Member Info window.

Settings – Membership Options

Please see "Membership Structure and Pricing" for detailed information on this topic.

- Membership Plans
- Punchcard Plans
- Day-Pass Plans
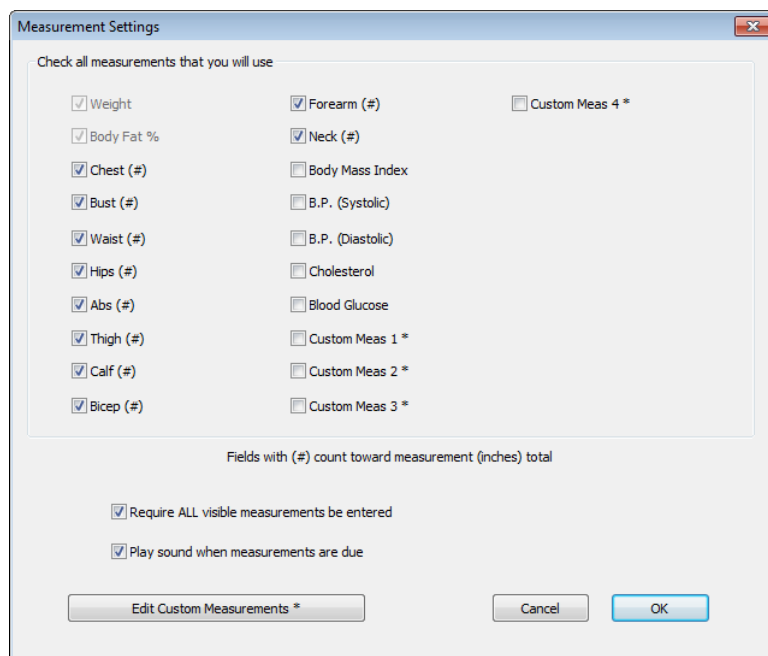- Punchcard Add-Ons
- Monthly Add-Ons

Measurements

Gym Assistant can track basic body measurements for your members each month. When a member checks in the program will emit a voice prompt ("It's time for your measurements!") if her next measurements are due to be recorded.

Long-term results can be reported or graphed for individual members or for the club as a whole.

Measurement Settings

Select **Measurements** from the **Settings** menu.

Check the boxes for the measurements that you want to track. A maximum of 16 measurements are allowed. These are the same measurements that will appear in graphs and reports.

Check **Require ALL visible measurements be entered** to ensure that users enter all measurements for each member.

Check **Play sound when measurements are due** to hear "It's time for your measurements!" when a member checks in and measurements are due to be recorded.
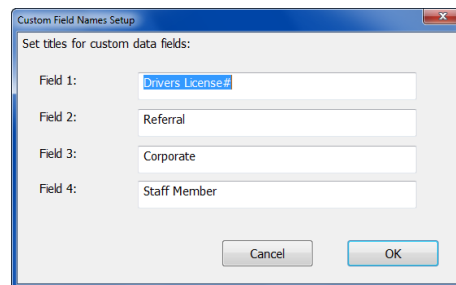
Custom Fields

You can define four custom member fields. These text fields can be used for drivers license, employer, interests (e.g. swimming, aerobics, boxing, etc.) or any other type of useful information. You can search the database using the custom fields (for example, list all members with employer "Oracle"). You can also create pre-filled lists of values for any custom field, for example a list of different employers to choose from.

> *Note*:   *Each custom field is limited to 64 characters in length.*

Naming the Custom Fields

Select **Custom Fields** from the **Settings** menu.

Enter the name you want to use for each field.

Defining Pre-Filled Lists for Custom Fields

Select Pre-Filled Lists from the Settings menu.

The custom field names that you created will appear in the list to edit. (See Pre-Filled Lists for more information.)
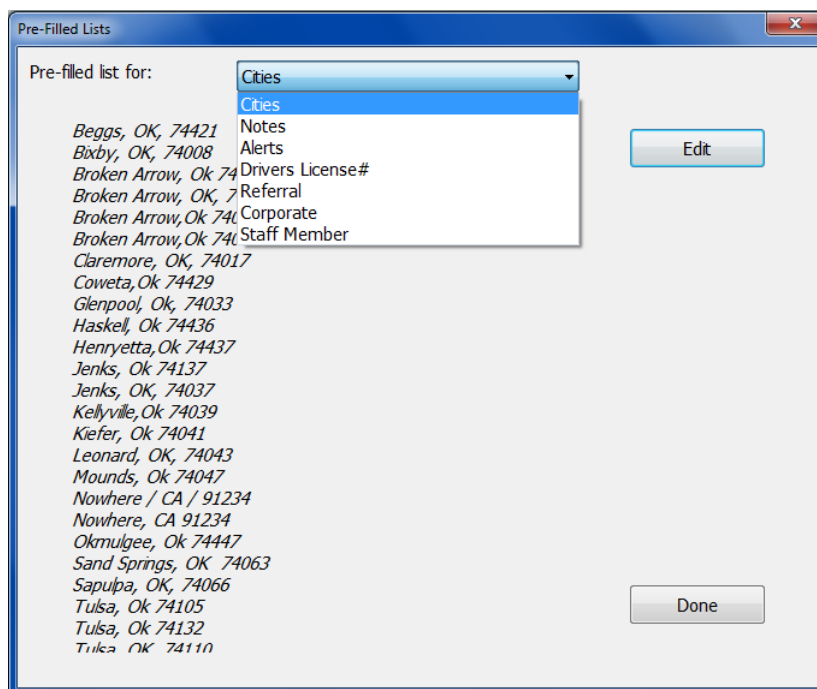
Pre-Filled Lists

You can create pre-filled pull-down lists for the following member fields:

- Cities
- Notes
- Alerts
- All Custom Fields

Editing Pre-Filled Lists

Select **Pre-Filled Lists** from the **Settings** menu.

- Select a field from the list and the list will be displayed.
- Click **Edit** to edit the list. Put each list entry on a separate line. The list will be automatically alphabetized when it is displayed to the user.

    Note: *Put a single space at the front of a list entry to make that entry appear at the top of the list.*

Working with Pre-Filled Lists

- Select from the prefilled list by clicking on the downward triangle to the right of the field.
- To add the current value to the prefilled list, click on the triangle and select "**Add Current Entry to List**."

Settings – Billing

General Billing Options

Please see **General Billing Options** under **Basic Settings** for detailed information on this topic.
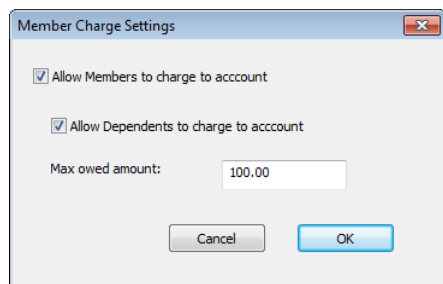
Credit Card Processing

Please see **Billing: Credit Cards** for detailed information on this topic.

ACH Processing

Please see **Billing: Credit Cards** for detailed information on this topic.

Member Charges to Account

To change global member charge settings select **Member Charges to Account** from the **Settings** menu.

- Check **Allow Members to charge to account** if you want to allow members to make charges on their account.
- Check **Allow Dependents to charge to account** if you want to allow dependent members to make charges on their account.
- Set the **Max owed amount** to limit the amount that each member can carry on account.

Invoices

> Please see **Printing Invoices** for detailed information on this topic.

Settings – Reports and Printing

Membership Reports

> Please see **Members List Reports** under **Reports** for detailed information on this topic.

Mailing Labels

> Please see **Mailing Labels** under **Member Communications** for detailed information on this topic.

Membership Cards

> Please see **Printing Membership Cards** under **Member Communications** for detailed information on this topic.

Settings – Hardware

Barcode Reader / Access Control

> Please see "Barcode Scanner Setup" and "Access Control Setup" documents for information regarding barcode reader and access control setup.
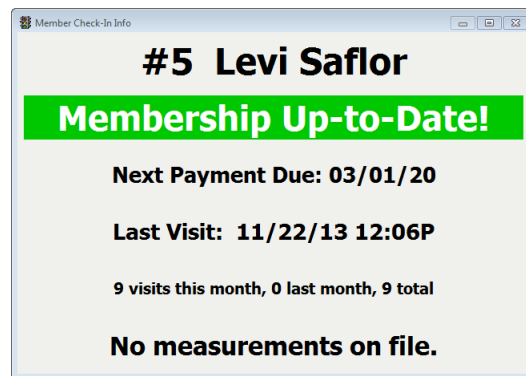
Dual Monitors

Gym Assistant can be used with two monitors, with one monitor for staff and a second monitor turned for members to see as they check in. The member display shows only information relevant for the member to see.

> **Note:** *The dual monitor functionality is controlled by GateKeeper, but you can change settings from within Gym Assistant.*

While GateKeeper is idle (no one is checking in) the Member display shows a basic "Welcome" message.
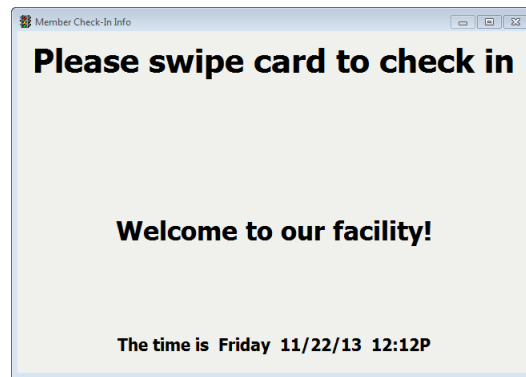
When a member checks in by scanning a card his info will be displayed.

After a few seconds the "Welcome" screen will again be displayed. You can control the "Welcome" message and the time period to display the member info.

Dual Monitor Settings

In Gym Assistant or GateKeeper select **Dual Monitors** from the **Settings** menu.
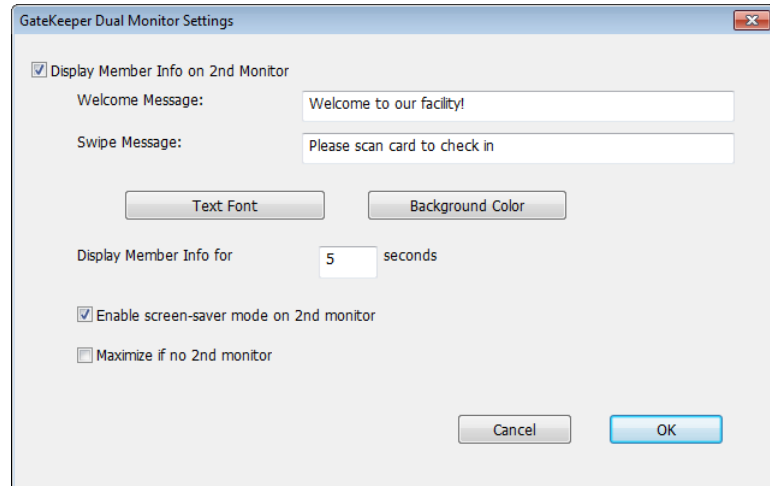
Check **Display Member Info on 2nd Monitor** to activate the dual monitor function.

The **Welcome Message** appears when a member checks in successfully.

The **Swipe Message** appears whenever GateKeeper is idle and waiting for a card swipe.

Click **Text Font** to change the font for the 2nd Monitor text.

Click **Background Color** to change the background color for the 2nd Monitor.

Display Member Info for X seconds determines the delay until a member's info clears from the display. If another member checks in before the delay time then the new member's info will display immediately.

If **Enable screen-save mode on 2nd monitor** is checked then after five minutes of idle time the 2nd monitor will display the Swipe Message in random locations on a black background. This will prevent monitor burn-in on older monitors.

If you have only one monitor but activate the dual monitor function then the member display window will appear on your main (only) monitor. If you **check Maximize if no 2nd monitor** then the member display window will maximize on the screen. This is useful if you let members see the main display while the gym is unstaffed.

Receipt Printing Setup

Gym Assistant can print receipts on many different types of printers:

- Standard Windows desktop printer (full-size sheet)
- Windows interface receipt printer
- Serial (RS232) interface receipt printer
- Parallel (LPT) interface receipt printer

Setting up a Windows Printer

To setup Gym Assistant to print a windows printer you must first install any required drivers and test to ensure that the driver is functioning properly. You can download drivers for the Star TSP100 printer at:

http://www.gymassistant.com/support/installers/utilities/

1. Bring up Properties for your receipt printer:

   Windows XP

   - Click the **Start** button and select **Settings / Printers and Faxes**.

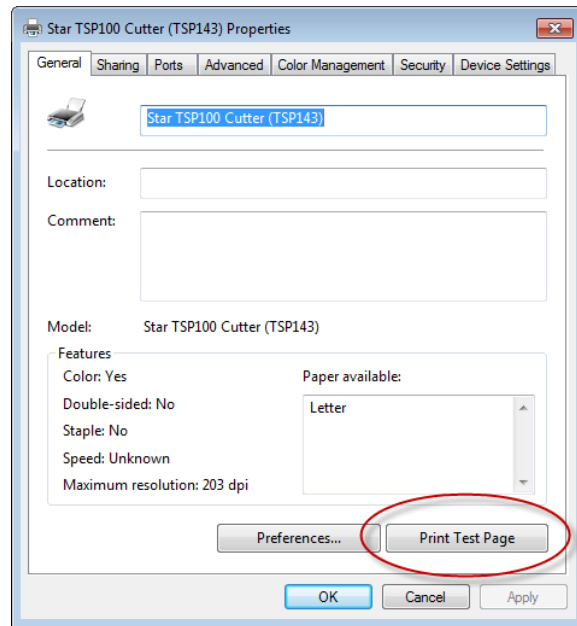   - Right-click your receipt printer and select **Properties**.

   Windows 7

   - Click the **Start** button and select **Devices and Printers**.

   - Right-click the receipt printer and select **Printer Properties**.

   Windows 8

   - From the **Start** screen type "Printers", then click **Settings** on the right side of the screen.

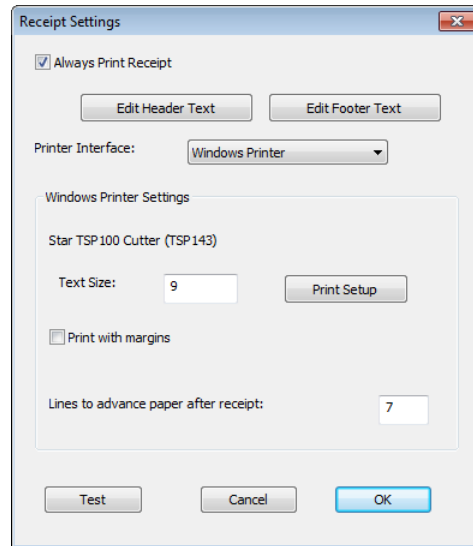   - On the left side of the screen click **Devices and Printers**.

2. Print a test page

   In the **General** tab click **Print Test Page**. A test page should print from the receipt printer.

Setting up Gym Assistant to Print to a Windows Printer

1. Select Receipt Printing from the Settings menu.

2. Set the **Printer Interface** to "Windows Printer".

3. Click **Print Setup**.

4. Select your receipt printer then click **OK**.

5. Uncheck **Print with margins**.

6. Click Test to print a test receipt.

Setting up Gym Assistant to Print to a Serial Printer

1. Select Receipt Printing from the Settings menu.

2. Set the **Printer Interface** to "Serial Printer".

3. Select an available serial port.

4. Check **Print with margins**.

5. Click Test to print a test receipt.

Cash Drawer Setup

Gym Assistant can trigger a cash drawer to open whenever a sale is made.   There are two ways that a cash drawer will connect to your computer:

- Serial (RS232) connection
- Receipt Printer connection

Serial (RS232) Cash Drawer Interface

This type of cash drawer connects directly to your computer with a 9-pin serial (RS232) cable (with screws).

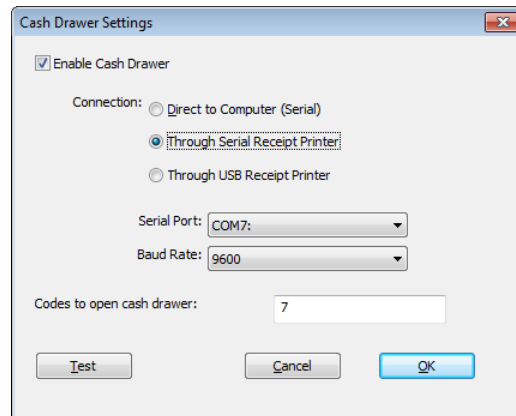1. Select **Cash Drawer** from the **Settings** menu.
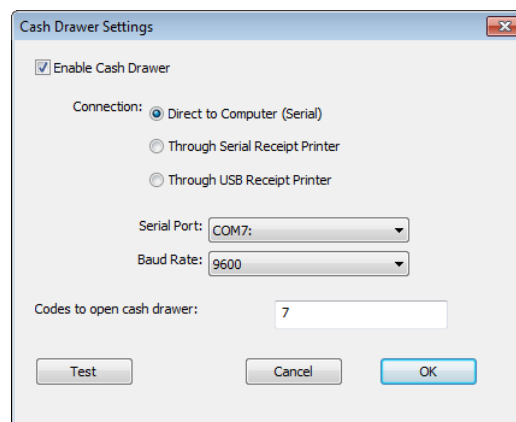
2. Check **Enable Cash Drawer**.
3. For **Connection** select **Direct to Computer (Serial)**.
4. Select an available **Serial Port**. Leave the **Baud Rate** at 9600.
5. Click **Test** to open the drawer. If the drawer does not open select another port and try again.

Receipt Printer Interface

This type of cash drawer connects to a receipt printer. The cable between the cash drawer and receipt printer looks exactly like a phone cable, but there is one important difference:

> ***Note***: *The receipt printer / cash drawer cable must be connected with the end labeled "Cash Drawer" attached to the cash drawer. If you connect the cable with the "Cash Drawer" end attached to the receipt printer the drawer will not function properly.*

1. Select **Cash Drawer** from the **Settings** menu.

2. Check **Enable Cash Drawer**.

3. For **Connection** select **Through Serial Receipt Printer** or **Through USB Receipt Printer**.

4. **Through Serial Receipt Printer**:
   - Select an available **Serial Port**. Leave the **Baud Rate** at 9600.
   - Click **Test** to open the drawer. If the drawer does not open select another port and try again.

5. **Through USB Receipt Printer:**
   - Click Test to open the drawer. If the drawer does not open click OK and see "Configuring a USB Receipt Printer" below.)

Configuring a USB Receipt Printer

If your cash drawer is connected to a USB receipt printer then you will need to configure the printer to open the cash drawer whenever a receipt prints.

> *Note*:   *The instructions below describe the steps to configure a Star Micronics TS100 printer. Your printer may be slightly different, but the general concept is the same.*

1. Bring up Properties for your receipt printer:

    Windows XP

    - Click the **Start** button and select **Settings / Printers and Faxes**.

    - Right-click your receipt printer and select **Properties**.

    Windows 7

    - Click the **Start** button and select **Devices and Printers**.

    - Right-click the receipt printer and select **Printer Properties**.

    Windows 8

    - From the **Start** screen type "Printers", then click **Settings** on the right side of the screen.

    - On the left side of the screen click **Devices and Printers**.

2. Click the **Device Settings** tab.
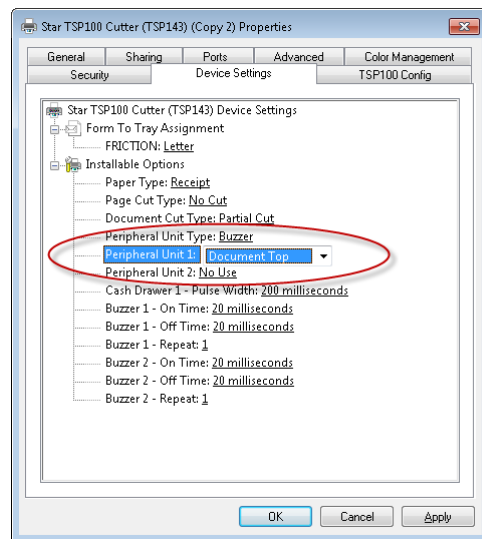
3. Set **Peripheral Unit 1** to "Document Top".

4. Click **Apply**.

5. Switch to **Gym Assistant**.

6. Select **Open Cash Drawer** from the **Utilities** menu. A short blank receipt will print, and the cash drawer should open.

Configuring the Star TSP100 USB Printer as a Serial Device

Opening the cash drawer every time you print a receipt is easy to setup, but it does not give Gym Assistant complete control over your cash drawer. To allow Gym Assistant to control the cash drawer independent of receipt printing you can reconfigure the TSP100 as a serial device.
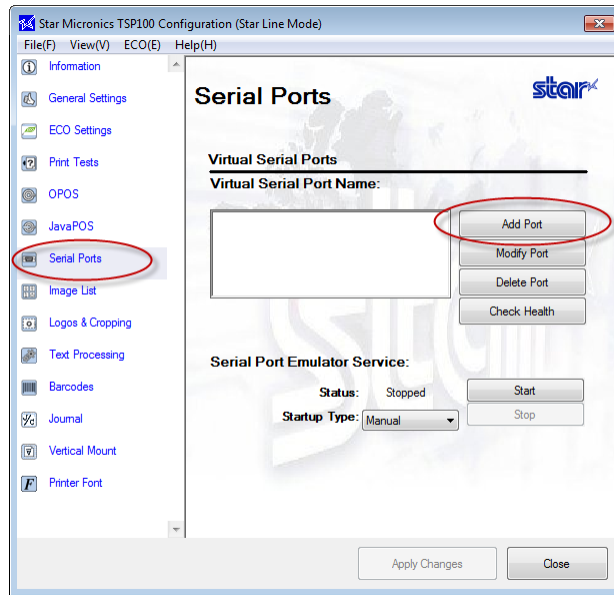
1. Bring up **Properties** for your receipt printer. (See directions above)

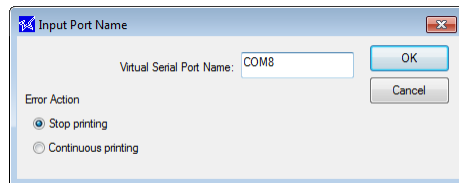2.   Click the **TSP100 Config** tab.
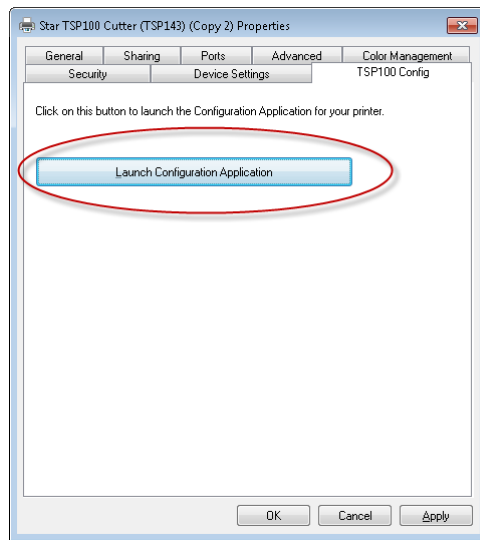
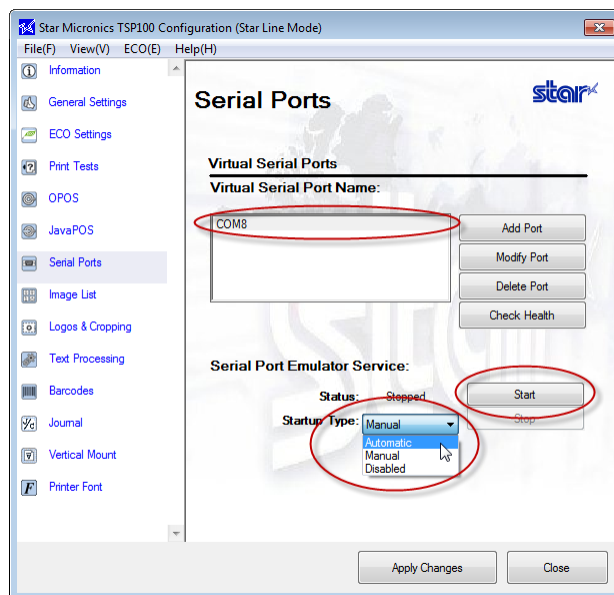3.   Click **Launch Configuration Application**.
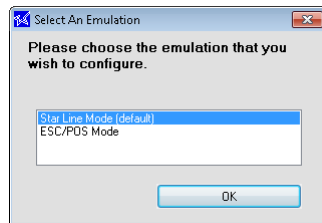
4.   Select Star Line Mode (default) and click OK.

5. Click **Serial Ports** (on the left).

6. Click **Add Port**.

7. Set the **Virtual Serial Port Name** to "COMX", where X is an unused serial port number. Then click **OK**.

8. Click on the newly-created port.

9. Set **Startup Type** to **Automatic**.

10. Click **Start**. **Status** should change to "Running".

11. Click **Apply Changes**.

12. Click **Check Health**. The utility should report "Check Health Completed Successfully".

You can now setup the receipt printer as a serial device. Note the COM port number that you created.

Setting up TSP100 as Serial Receipt Printer and Cash Drawer

1. In Gym Assistant select Receipt Printing from the Settings menu.

2. Set Printer Interface to Serial Printer.

3. Set the Serial Port to the newly-created Virtual COM port created above.

4. Check the Auto Cut Paper.

5. Click Test. A test receipt should print.

6. Click OK.

7. Select Cash Drawer from the Settings menu.

8. For Connection select Through Serial Receipt Printer.

9. Set the Serial Port to the same serial port as above.

10. Click Test. The cash drawer should open.

11. Click OK.

Settings – Administration

Online Connect Setup

Online Connect is Gym Assistant's direct connection with the GymAssistant.com web server. Online Connect provides many functions from within the software:

- Automatic Software Updates
- Automatic online data backup (and restore)
- Sending emails through GymAssistant.com mail server

To setup Online Connect select Online Connect from the Settings menu.
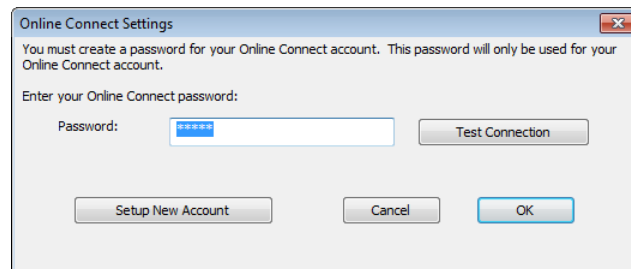
If you have not previously setup an Online Connect account click **Setup New Account**.

1. Enter a password for your account.

   - The password must be at least 8 characters and contain both upper and lower case letters as well as at least one digit.
   - Gym Assistant will remember the password, so you won't have to. We recommend that you enter a sequence of your password just contact Technical Support.

2. Re-enter the password. Your account is now setup.

Email Setup

Gym Assistant gives you two methods for sending emails. Each method has its pros and cons.

GymAssistant.com Mail Server

This option allows you to send emails through the Gym Assistant mail server.

- Setup is very simple. (See "Online Connect Setup" above)
- Access to GymAssistant.com mail server is provided free-of-charge for all customers with a valid support contract.
- Some ISPs may block incoming emails as spam if the emails come from a domain different from the sender's email address. (e.g. the email sender is johndoe@gmail.com, but the email originated from gymassistant.com)
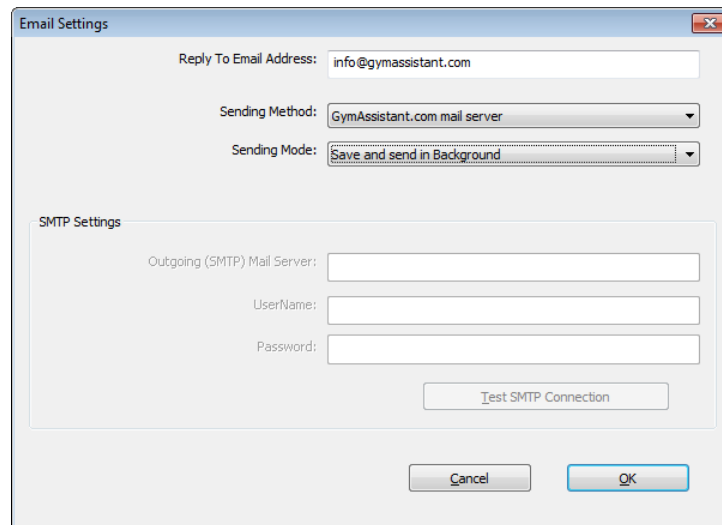- Requires that **Online Connect** is configured first.

Your SMTP server

This option allows you to send emails through your own SMTP mail server.

- This option is more complex to setup.

- Some ISPs require settings that are not available in Gym Assistant.

- SMTP option is not available for some web-based email clients (e.g. Gmail, Yahoo, etc.).

- SMTP method is generally faster to send emails.

- ISPs are less likely to block emails as spam.

Setting up Email in Gym Assistant

Select **Email** from the **Settings** menu.

1. Enter a Reply-To Email Address. This is the email address to which a reply is sent if the recipient chooses to reply.

2. Select a **Sending Method**. (See above for a description of the different methods.)

3. Select a **Sending Mode**:

- Send Immediately – You will need to wait until emails are sent before continuing to work in Gym Assistant.

- Save and Send in Background – Emails will be placed in a queue and sent in the background, so you can return to working in Gym Assistant right away.

If you selected the SMTP method, then you must enter settings for your SMTP server. Please refer to instructions from your ISP for proper settings.

Language / Time / Date

To change formatting for date, time, measurement and currency select Language/Time/Date from the Settings menu.
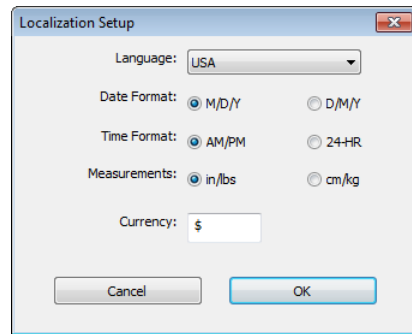
Note that Language selection only changes certain phrasing in the software, such as "Expiry Date" instead of "Expiration Date".