USER MANUAL

Gym Assistant User Guide

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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 7
- Windows 8
- Windows 10
- Windows 11

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

8 GB RAM suggested, 4 GB minimum

40 MB hard disk space available

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

Welcome to Gym Assistant 1

A check-in (or visit) is recorded each time the member walks into the club. Check-in can happen either automatically (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 paid for separate from the regular membership.

A **Punchcard Add-On** is a prepaid batch of credits for some activity, such as personal training sessions, cardio classes or tanning sessions. (Note that a Punchcard Add-On is different from a member Punchcard Plan. With a Punchcard Plan, one visit credit is deducted every time the member walks into the club. With a Punchcard Add-On, a credit for that activity is deducted only when the member uses one of her pre-purchased add-on credits.)

A **Monthly Add-On** is a fixed amount added to the member's regular monthly billing. Examples of Monthly Add-Ons would include monthly locker rental, unlimited tanning and 24-hour access.

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.

Attachments

You can attach any type of file to a member record. Examples of attachments would be:

- Signed contracts and waivers
- Photos
- Scan of drivers license or other documentation

Waiver / Vaccine Status

Gym Assistant can track whether members have a waiver and/or vaccine status on-file.

Member Notes

You can add an unlimited number of text notes to every member record. Every note entry is time/date stamped.

Document Templates

Gym Assistant can generate documents for members, either individually or in bulk (e.g. sending an email to all members). Document templates let you create generic documents that will be customized for each member with fields from that member's data.

Member Portal

The Gym Assistant Member Portal allows members to connect through the web. New members can signup online. And existing members can view and make a payments on their account and eSign documents.

Occupancy Monitor

Gym Assistant will keep track of how many members are on-site so if necessary you can limit the number of members in the gym at any one time.

DoorWatcher

For Access Control customers DoorWatcher will capture video activity at the door whenever a member scans his card and whenever the door is opened. You can very quickly review overnight activity to determine if members are bringing in friends or opening the door for other people.

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.

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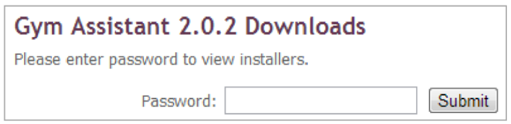
Installing the Software

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

Select the most recent version of Gym Assistant (v2.6.0).

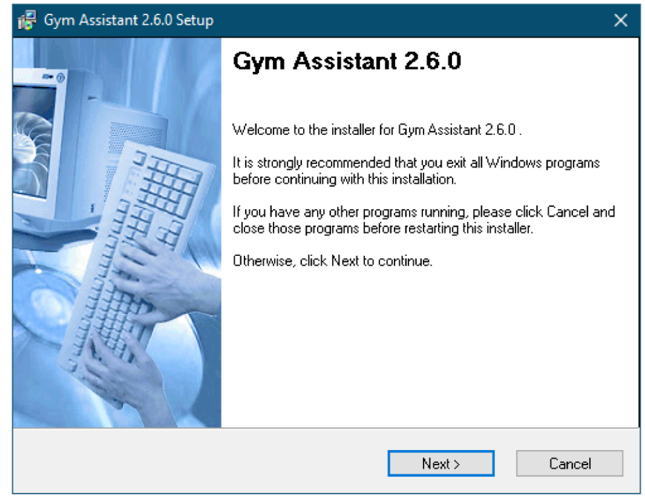
Enter the password sent with your registration email.



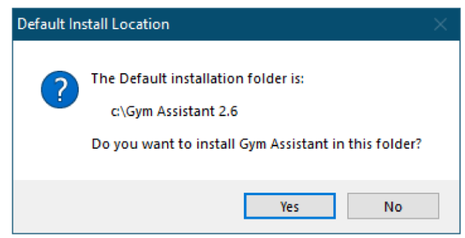
Note: If you do not have the password for your installer page, please contact Gym Assistant for assistance.

Download and open the most recent version of Gym Assistant installer ("GymAsst260_Setup.exe").

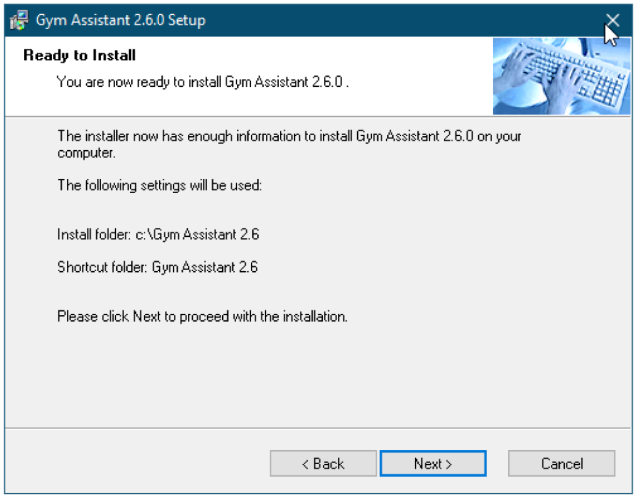
In the Gym Assistant Setup window that appears, click **Next**.



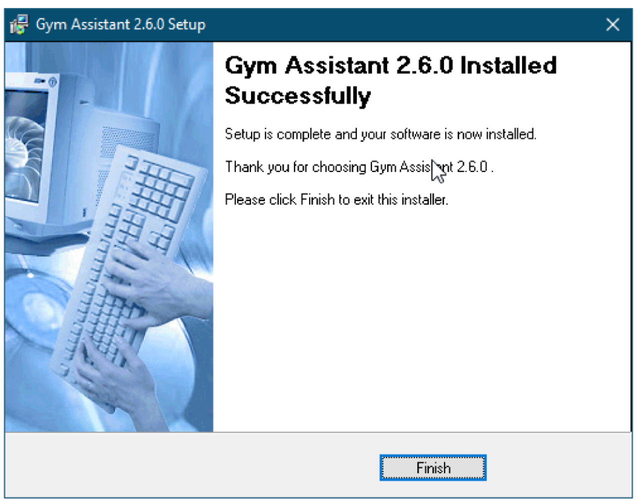
In the Installation Folder window that appears, click **Yes**. Do not change the installation folder unless instructed by Gym Assistant Support.



In the "Ready to Install" window that appears, click **Next**.



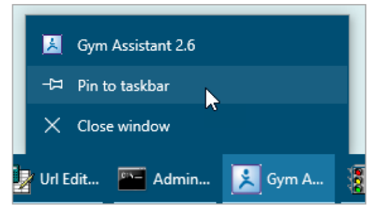
After the installation is complete, click **Finish**.



When the installer will ask if you want to launch Gym Assistant now, click **Yes**.

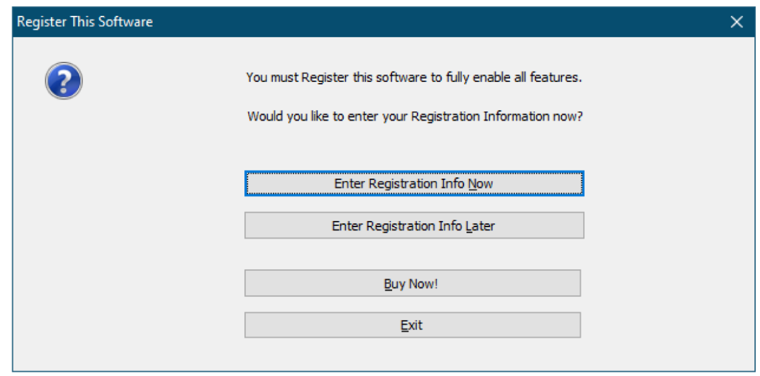
Adding Gym Assistant to the Taskbar

To add Gym Assistant to the Taskbar, right-click on the Gym Assistant icon on the Taskbar and select **Pin to Taskbar**.



Registering Your Software

The first time you run Gym Assistant the Software Registration window will appear.

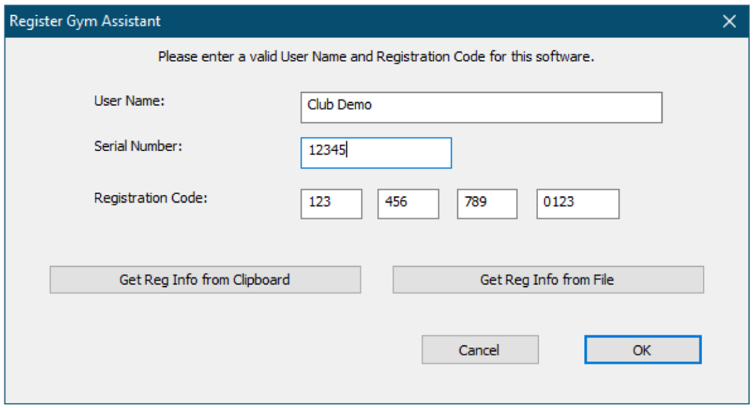


You should have received Registration Information from Gym Assistant by email.

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 if you do not enter a valid registration code.

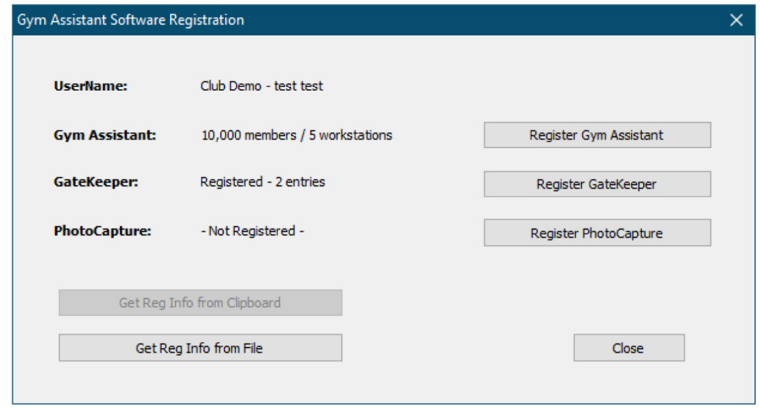


If you have the registration info on your computer, copy the entire Registration Codes block of text from the email that you received after your software purchase, then click **Get Reg Info from Clipboard**.

Otherwise 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.*

The Registration Info window then appears displaying your information.

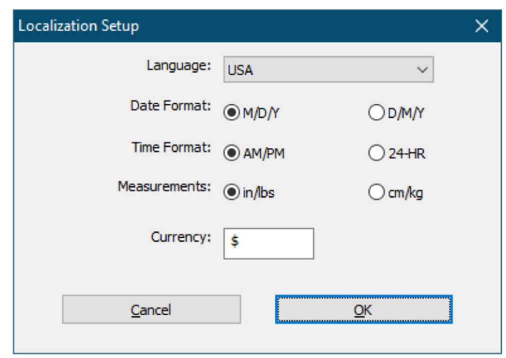


If you purchased GateKeeper, click **Register GateKeeper** and enter the GateKeeper registration code that you received.

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

Click **Close** to proceed.

The Localization Setup window now appears.

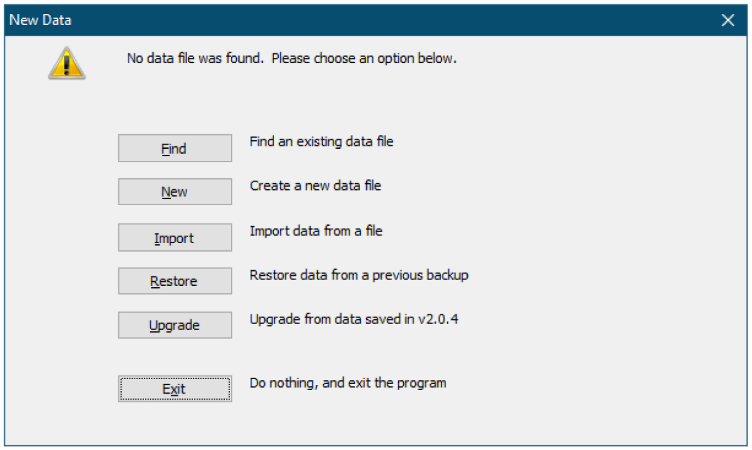


Select a Language and set options for Date Format, Time Format, Measurements and Currency or click OK to accept the defaults.

Getting Started

Creating a New Data File or Setting the Data Path

The New Data window now appears.



Click **Find** to set the data file to an existing location.

Click **Browse** to navigate to an existing **Members.dat** file somewhere on your computer or on your network.

Click **New** to create a new empty data file.

The default data path resides within the Gym Assistant application folder. Click **Use Current Path** to accept the default path, or click **Browse** to select a different path.

Click **Import** to import a data file sent to you from Gym Assistant.

This option is normally used if data was converted from another software. Please contact Support if you need to convert your data.

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.

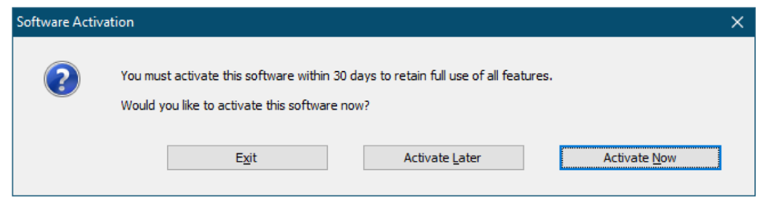
Click **Upgrade** if you are upgrading from Gym Assistant v2.0.4 and you have run the **Prepare for Upgrade** feature in that version.

Getting Started

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

Activating Your Software

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 activate your software on this computer within 30 days of installation. After that time, some features will be disabled until activation is completed.



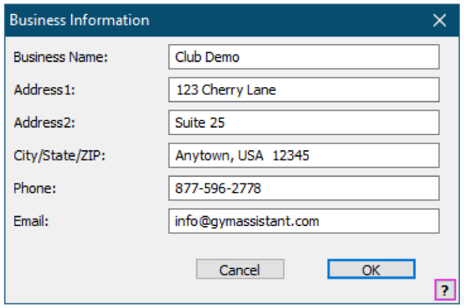
Software Activation requires that you obtain a unique Activation Code for the installation on your computer. You can obtain your activation code by several means:

- **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, please call Gym Assistant Support to obtain your activation code.

Business Information

The first time that you start the program it will ask you to enter your business Information.

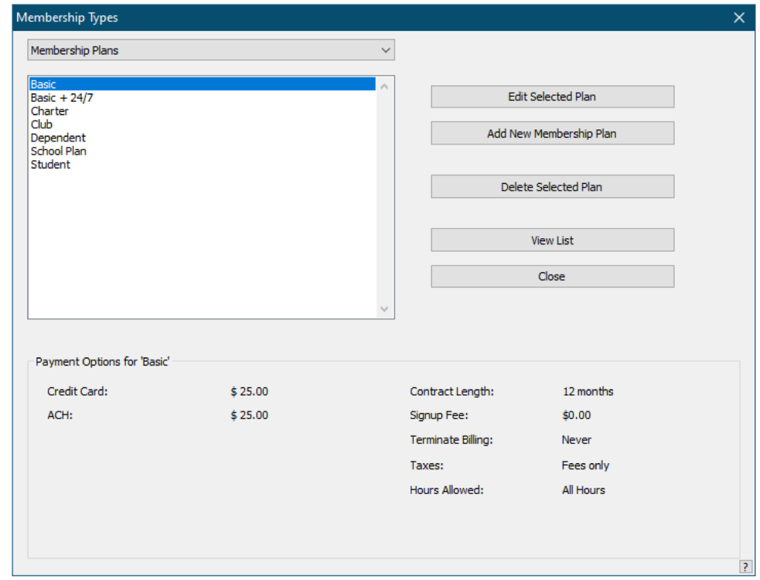


After entering your information, press the **Enter** key or click **OK** to continue.

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

Membership Plans

Now enter the different membership types that your gym offers.



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)

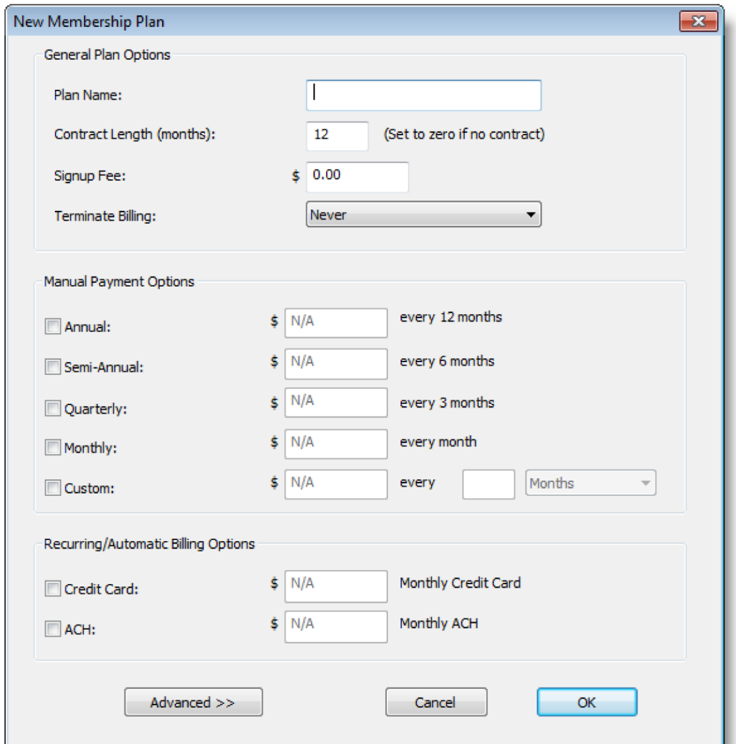
Hours of entry (ALL hours or limited hours/days)

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.

Click Add New Membership Plan to add a new membership type.

The New Membership Type window will appear.



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.

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

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.

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

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

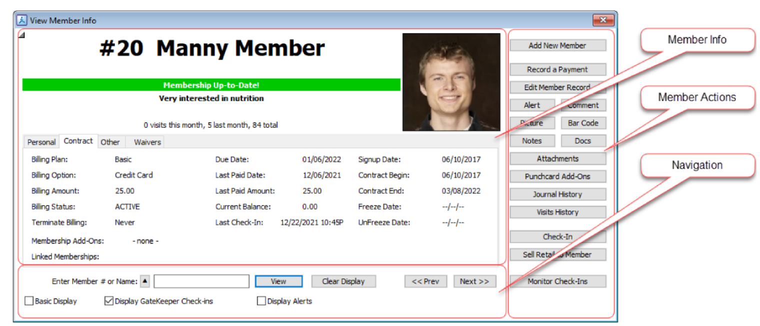
The new membership type will then appear in the Membership Types window.

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

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

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:



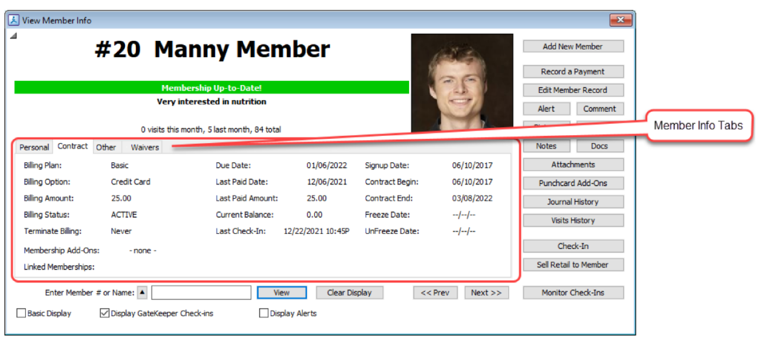
- The **Member Info** area displays the information for this member.

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

Turn Background ON/OFF

Click in the upper-left corner of the View Member Info window to toggle whether the application window is visible.

Member Info Area



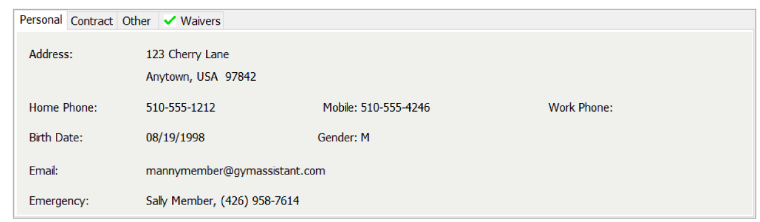
The following information is displayed in the top of the **Member Info** area:

- **Member Number** and **Member 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 following tabs display all other information about the member.

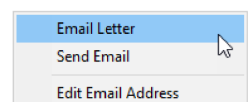
Personal Tab



You can click on many of the fields to edit that field or take some action.

Click on the **Home Phone**, **Work Phone** and **Emergency** fields to edit.

Click on the **Email** field to bring up the Email popup menu:

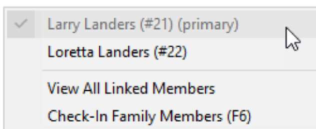


Contract Tab

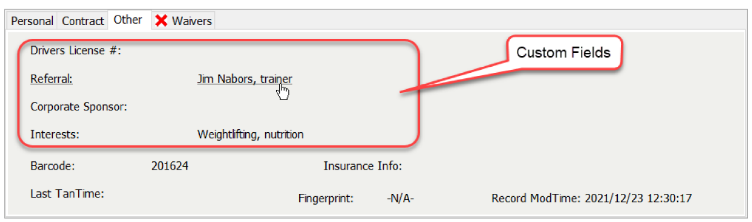
Click on the **Billing Option** field to view/edit the member credit card or ACH info.

Click on the **Due Date** field to view a member statement.

Click on the **Linked Memberships** field to display the Linked Members popup menu.



Other Tab



Custom fields can be user-defined to hold any type of text information. Click on any custom field to edit the field value.

Click on **Barcode** or **Insurance Info** fields to edit the field value.

Click on Last Tan Time field to clear the field value, which will allow the member to bypass the 24-hour tanning rules.

Click on **Fingerprint** field to assign a new fingerprint for this member. (Only applicable if you are using the FingerScan add-on)

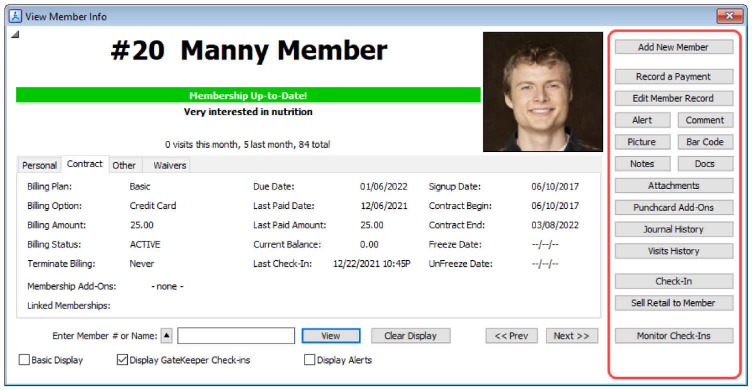
Record ModTime displays the last time that this member record was modified.

Waivers Tab

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: The complete set of available actions are always available from the menu bar. All actions that can be applied to the displayed member are also found in the Member menu.



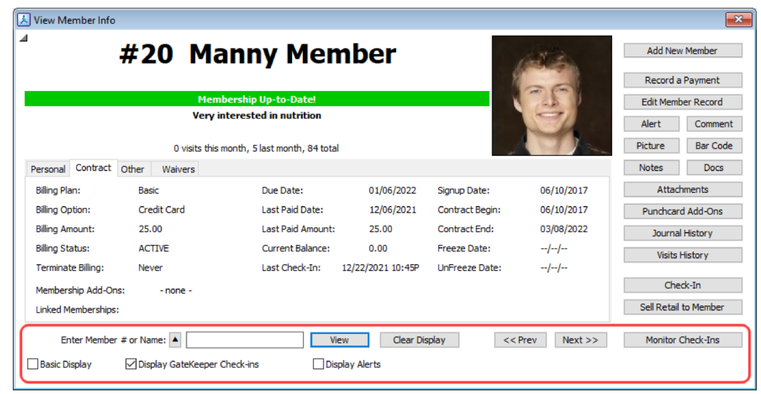
Member Actions buttons include the following functions:

Add New Member	Add a new member.
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.
Docs	Create/Send forms/letters/SMS messages to this member.
Attachments	Add/Review file attachments for this member.

Punchcard Add-Ons	Record usage of a member punchcard credit. Add/Edit member punchcard add-ons.
Journal History	View transaction history for this member
Visits History	View visits history for this member
Check-In	Record a visit for this member.
Sell Retail to Member	Sell retail items to this member (through ProShop)

Navigation Area

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



Enter 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 not 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.) (See Member Lookup 24)
Last Members Viewed	Click this button to display a quick list of the last 20 members viewed.
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 24)

Member Lookup

Lookup by Membership Number or Barcode

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

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.

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

General Search (Find)

General Search will look in all fields for a possible match.

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

Enter the text you want to find, then click **OK**.

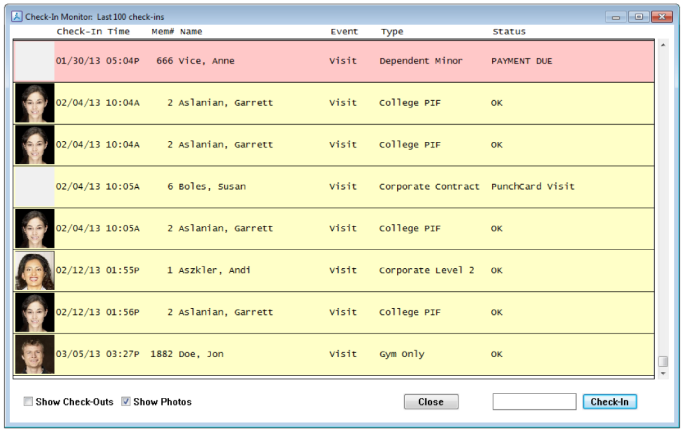
A list of members with the matching text will be displayed. Select one of the entries and click **OK** (or press the **Enter** key).

Monitor Check-Ins

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

Viewing Member Information

3



Click **Monitor Check-Ins** in the **View Member Info** window.

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

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

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.*

Select **ALL Settings** from the **Settings** menu to see a comprehensive list of all settings.

Settings are divided among the following categories:

Settings

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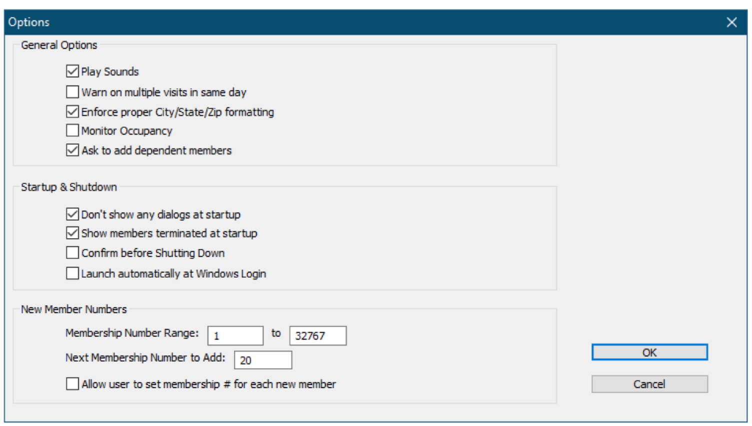
Settings 4

Settings - Preferences

Program Options

Program Options set basic settings for the application.



Settings 4

Play Sounds

Check this box to play the “ping” and “buzz” sounds when members check in.

Warn on multiple visits in same day

Check this box to have Gym Assistant warn you when you try to manually record a second 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.

Monitor Occupancy

Check this box to have Gym Assistant monitor the number of members on-site. See Monitoring Occupancy Levels for more information.

Ask to add dependent members

Check this box if you want Gym Assistant to allow you to add dependent members to a new membership.

Don’t show any 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. To change this setting you will have to start Gym Assistant as Administrator. (Right-click on the Gym Assistant icons and select Run as Administrator.)

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.

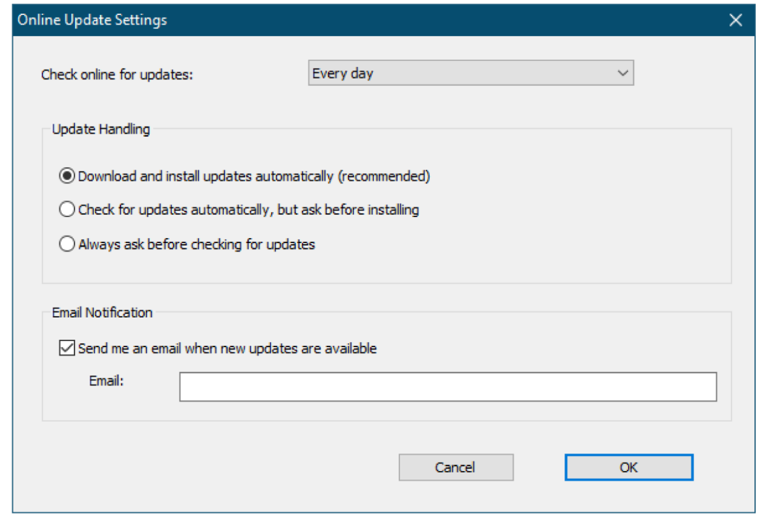
Allow user to set Membership # for each new member

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

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.

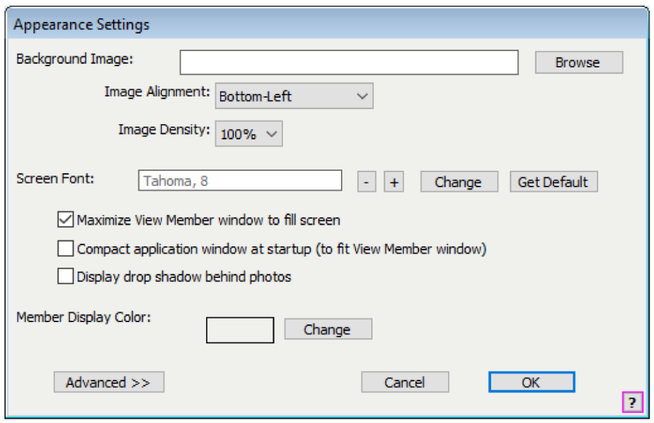
- **Check for updates automatically, but ask before installing** will download an update if it is available but you get to determine when the update is installed. Use this setting if you want to control when the update is installed, maybe to wait until you have done a global backup of the data.
- **Always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

Appearance

Gym Assistant allows you to customize the look of the program.



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

This item 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 - or + buttons to change the text size.
- Click **Change** to set the font (family, size and style).
- Click **Get Default** to get 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.

Advanced >>

Click to change the horizontal and vertical scaling factors, which can help if the current font causes unexpected truncation of some dialog items. If some text and/or controls show unexpected results then try increasing the horizontal scaling factor by a few percent.

Settings – Membership Options

Please see “Membership Structure and Pricing” for detailed information on this topic.

Membership Plans 33 Punchcard Plans 33 Day-Pass Plans 33

Punchcard Add-Ons 33 Monthly Add-Ons 33

Measurements 34

Custom Fields 36

Pre-Filled Lists 37

Daily Schedules 39

Waivers and Vaccine Status 42

Membership Plan Settings

Please see Membership Structure & Pricing 75 and Editing Membership Types 77.

Punchcard Plan Settings

Please see Membership Structure & Pricing 75 and Editing Membership Types 77.

Day-Pass Plan Settings

Please see Membership Structure & Pricing 75 and Day-Pass Plan Payment Options 82.

Punchcard Add-On Settings

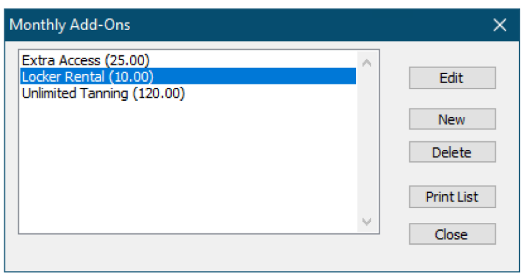
Please see Setting up Punchcard Add-Ons 112.

Monthly Add-On Settings

A **Monthly Add-On** is a fixed amount added to the member's regular monthly billing. Examples of Monthly Add-Ons would include monthly locker rental, unlimited tanning and 24-hour access.

Monthly Add-On Settings

Select **Monthly Add-Ons** from the **Settings** menu.

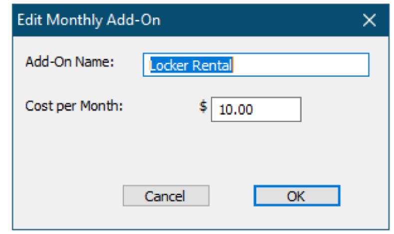


Click **Edit** to edit the selected add-on.

Click **New** to create a new add-on.

Click **Delete** to delete the selected add-on.

Editing a Monthly Add-On



Enter a name for the add-on, and the cost-per-month.

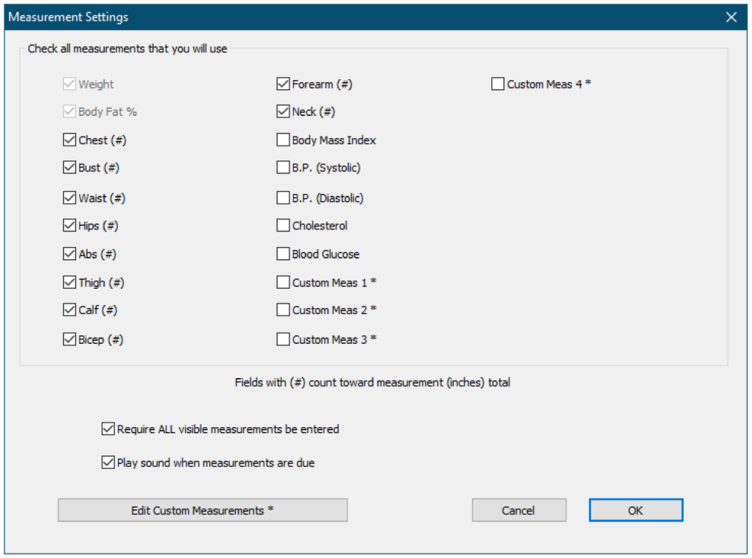
Measurements Settings

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.

See Member Measurements 130.

Long-term results can be reported or graphed for individual members or for the club as a whole.

Select **Measurements** from the **Settings** menu.

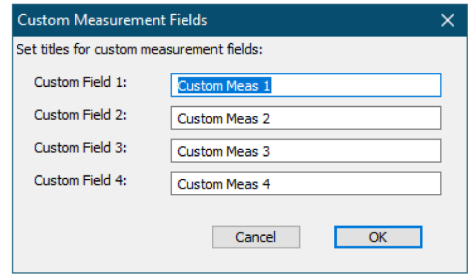


Check the boxes for the measurements that you want to track. A maximum of 16 measurements are allowed. These are the same measurements that will appear in graphs and reports.

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.

Click **Edit Custom Measurements** to edit the four custom measurement names.



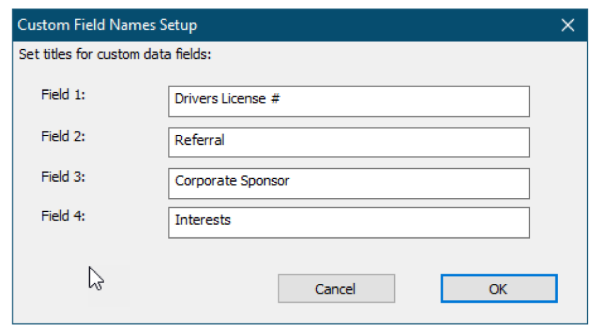
Custom Fields Settings

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 data 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 37 for more information.)

Pre-Filled Lists 37

Pre-Filled Lists Settings

You can create pre-filled pull-down lists for the following member fields:

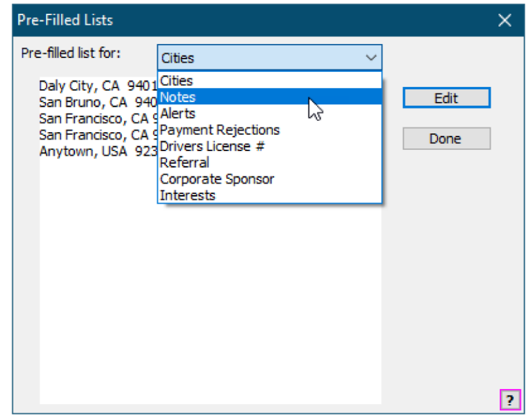
- Cities
- Notes
- Alerts
- All Custom Fields

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**."

Editing Pre-Filled Lists

Select **Pre-Filled Lists** from the **Settings** menu.

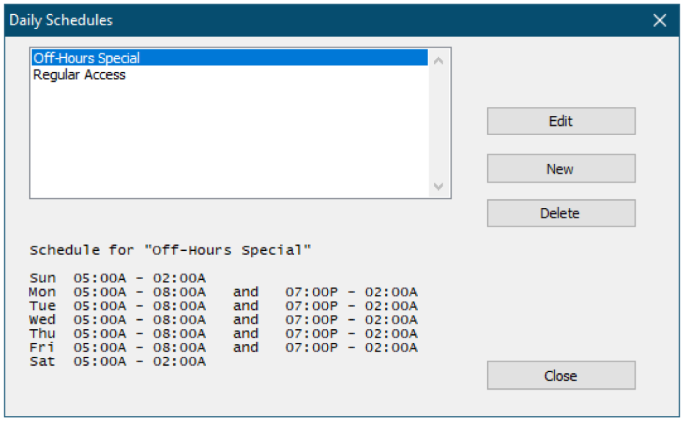


- Select a field from the list and the list will be displayed.
- Click **Edit** to edit the list. Put each list entry on a separate line. The list will be automatically alphabetized when it is displayed to the user.

Note: Put a single space at the front of a list entry to make that entry appear at the top of the list.

Daily Schedule Settings

Select Daily Schedules from the Settings menu.



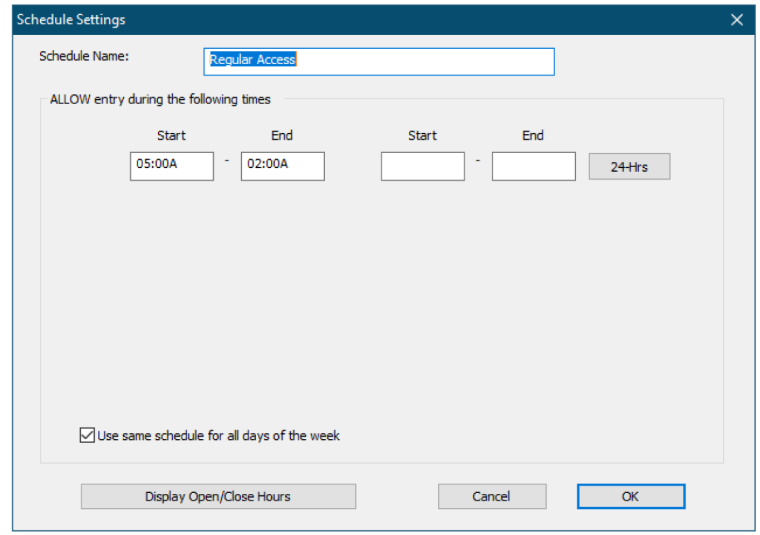
Click on a schedule to view the schedule parameters.

Click **Edit** to edit the selected schedule.

Click **New** to create a new schedule. You can create up to 8 schedules.

Click **Delete** to delete the selected schedule.

Editing a Daily Schedule

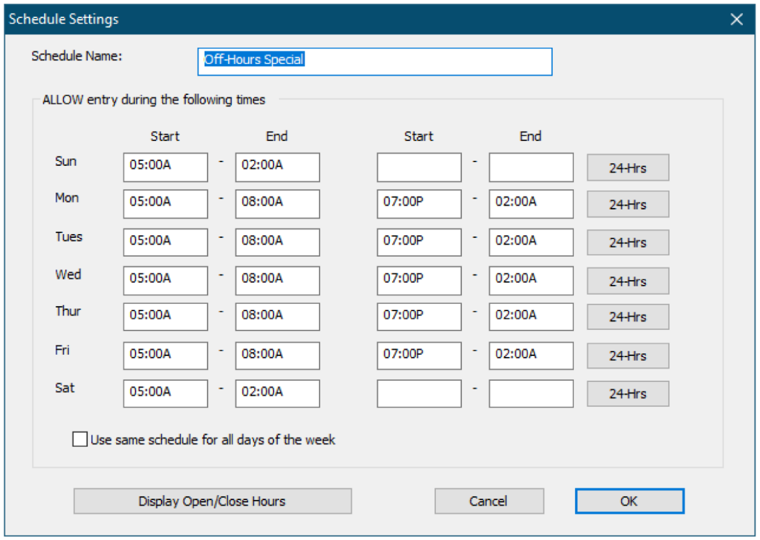


You can specify two allowed time periods for each day. For example, you might allow entry from 5am-7am in the morning and then 7pm-11pm at night.

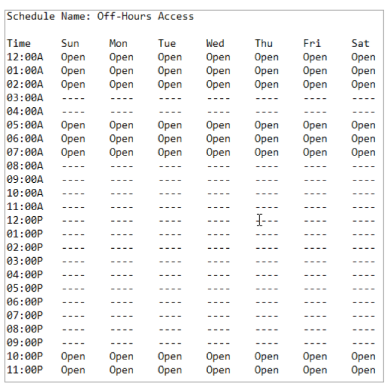
If a Start/End period passes midnight then the time period extends to the next day. For example 10pm-2am on Friday would extend from 10pm Friday to 2am Saturday.

Click the **24-Hrs** button to allow entry at any time that day.

Uncheck the **Use same schedule for all days of the week** box to allow a different schedule for every day of the week (below).



Click **Display Open/Close Hours** to show a 24/7 display of when the when the current Schedule is active (below).



Schedule Name: Off-Hours Access

Time	Sun	Mon	Tue	Wed	Thu	Fri	Sat
12:00A	Open	Open	Open	Open	Open	Open	Open
01:00A	Open	Open	Open	Open	Open	Open	Open
02:00A	Open	Open	Open	Open	Open	Open	Open
03:00A	----	----	----	----	----	----	----
04:00A	----	----	----	----	----	----	----
05:00A	Open	Open	Open	Open	Open	Open	Open
06:00A	Open	Open	Open	Open	Open	Open	Open
07:00A	Open	Open	Open	Open	Open	Open	Open
08:00A	----	----	----	----	----	----	----
09:00A	----	----	----	----	----	----	----
10:00A	----	----	----	----	----	----	----
11:00A	----	----	----	----	----	----	----
12:00P	----	----	----	----	----	----	----
01:00P	----	----	----	----	----	----	----
02:00P	----	----	----	----	----	----	----
03:00P	----	----	----	----	----	----	----
04:00P	----	----	----	----	----	----	----
05:00P	----	----	----	----	----	----	----
06:00P	----	----	----	----	----	----	----
07:00P	----	----	----	----	----	----	----
08:00P	----	----	----	----	----	----	----
09:00P	----	----	----	----	----	----	----
10:00P	Open	Open	Open	Open	Open	Open	Open
11:00P	Open	Open	Open	Open	Open	Open	Open

Introduction

Gym Assistant now allows you to track member waiver and/or vaccine status. The Waivers tab shows whether the member has a valid waiver and/or vaccine status.

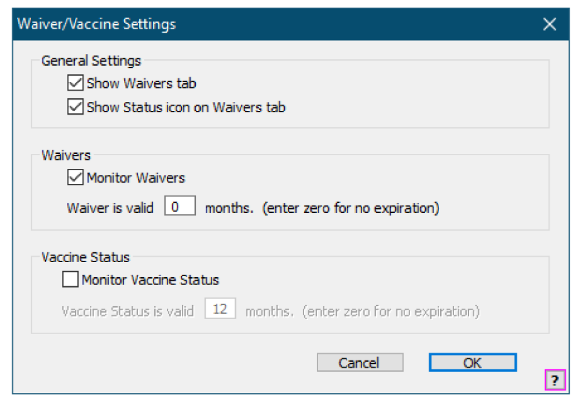
You can turn on/off whether you want to track each kind of documentation.

You can specify when the waiver or vaccine status were collected, and even attach document files for viewing if you have them. Saved document files or images are saved in the member's Attachments folder.

This feature only indicates tracks one waiver explicitly. If you require multiple waivers then use the On File status to indicate whether all required waivers are on file.

To Turn on Waiver and Vaccine Status Tracking

Select **Waiver / Vaccine Status** from the **Settings** menu.



Check **Show Waivers tab** to turn on the Waiver tab.

Check **Show Status icon on Waivers tab** to turn on the yes/no icon on the Waivers tab.

Check **Monitor Waivers** if you want to track waiver status for your members.

If your waivers have a time limit, then enter the number of months for which a waiver is valid in the field.
If your waivers never expire, then enter zero.

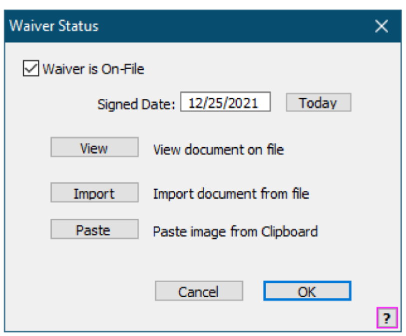
Check **Monitor Vaccine Status** if you want to track waiver status for your members.

If your members' vaccine status much be renewed after a given time, then enter the number of months for which status is valid in the field.
If your members' vaccine status never expire, then enter zero.

Viewing and Updating a Member's Waiver/Vaccine Status

Click the Waivers tab.

To update or view the member's Waiver or Proof of Vaccine, click the Update.



There are 3 ways that you can update the member's status:

- Check the **Waiver is On-File** box. You would use this option if you are only confirming that the document or status is OK and not saving the document in Gym Assistant.
- Click the **Import** button to select a document file and save it in the member's record.
- Click the **Paste** button to paste an image from the clipboard and save it in the member's record.

Updating the document status will automatically set the **Signed Date** with the current date.

If a waiver or vaccine status document have previously been saved then click the **View** button to view the document.

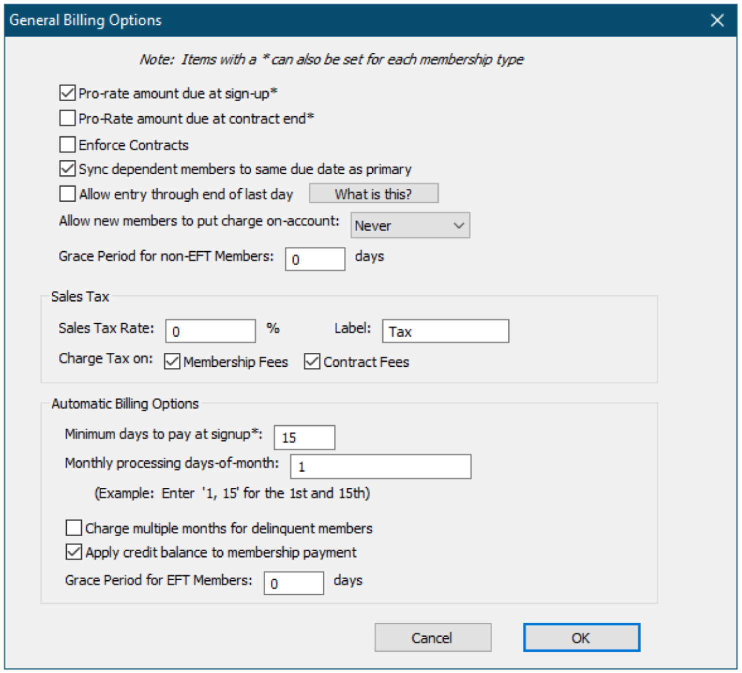
Reporting on Waiver or Vaccine Status

Waiver/Vaccine Status have been added as flags in Members Detail reporting.

Settings – Billing

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).*

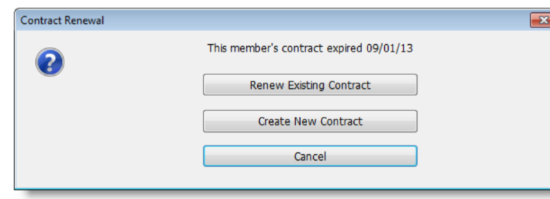
Pro-rate amount due at contract end

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.

Allow entry through end of last day

When this box is checked a member is allowed entry on their due date.

When this box is unchecked a member is denied entry as of 12:01am on their due date.

Allow new members to put charge on-account

This setting determines if charges at signup can be put on a member's account instead of being paid at signup. Putting initial charges on-account can be useful if you want to bill members later for signup.

- Always: Signup charges can be put on-account for all member types.

- Only EFT: Only members with CC and ACH billing options can put signup charges on-account.
- Never: No members can put signup charges on-account.

Grace Period for non-EFT Members

This setting determines whether members are allowed entry for a few days after their due date.

Note that there is a separate grace period for EFT (CC or ACH) members. (see below)

Sales Tax

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 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 5^{th} and 20^{th} 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.

Charge Multiple Months for Delinquent Members

Check this box if you want to always charge members for all delinquent dues. For example, if a member is 3 months past due then he will be charges for all 3 months when billing is run. This will ensure that all members are kept current (as long as charges go through).

Uncheck this box if you only want to charge delinquent members for a single month at a time. For example, if a member is 3 months past due then he will only be charge for one month when billing is run. Note that this may prevent a delinquent member from clearing past-due charges.

Apply Credit Balance to Membership Payment

Check this box if you want to always apply any member credit to a member’s billing amount. For example, suppose a member has a $15 credit on her account and a $50/month membership.

If this box is checked, then the member will be charged only $35, and the $15 credit will be cleared after billing.

If this box is unchecked, then the member will be billed the full $50 membership, and the $15 credit will remain on her account after billing.

Grace Period for EFT Members

This setting determines whether CC and ACH members are allowed entry for a few days after their due date. Setting this value takes off the pressure to always run billing exactly on the member’s due date. It also gives members a temporary buffer should their initial payment not go through.

Credit Card Processing

Please see Credit Card Settings 135 for detailed information on this topic.

ACH Processing

Please see Billing: Credit Cards 133 for detailed information on this topic.

Billing Notifications

Gym Assistant can send out notifications to members telling them that they have a recurring or manual payment coming up soon.

Notifications are sent by SMS if the member has a mobile phone on file, or by email if there is no mobile phone on file.

Sample CC Notification

Your automatic payment is scheduled for 06/15/2021 (2 days from now). On that day $35.00 will be to your VISA ending in 1234.

Sample ACH Notification

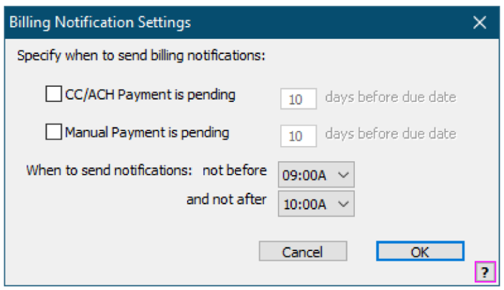
Your automatic payment is scheduled for 06/15/2021 (2 days from now). On that day $35.00 will be debited from your bank account ending in 1234.

Sample Manual Payment Notification

Your membership payment of $35.00 is due on 06/15/2021 (2 days from now).

Billing Notification Setup

Select **Billing Notifications from the Settings** menu.

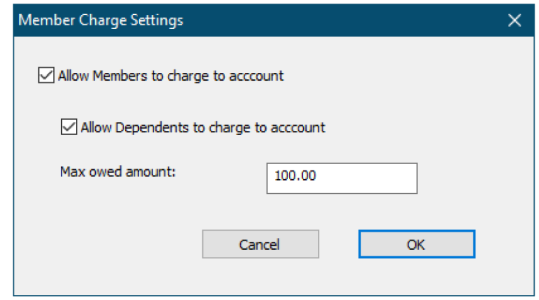


Check the **CC/ACH Payment is pending** box to send notifications for upcoming recurring payments. Specify how many days before the payment the notification will be sent.

Check the **Manual Payment is pending** box to send notifications for upcoming non-recurring payments. Specify how many days before the payment the notification will be sent.

Member Charges to Account

To change global member charge settings select Member Charges to Account from the Settings menu.



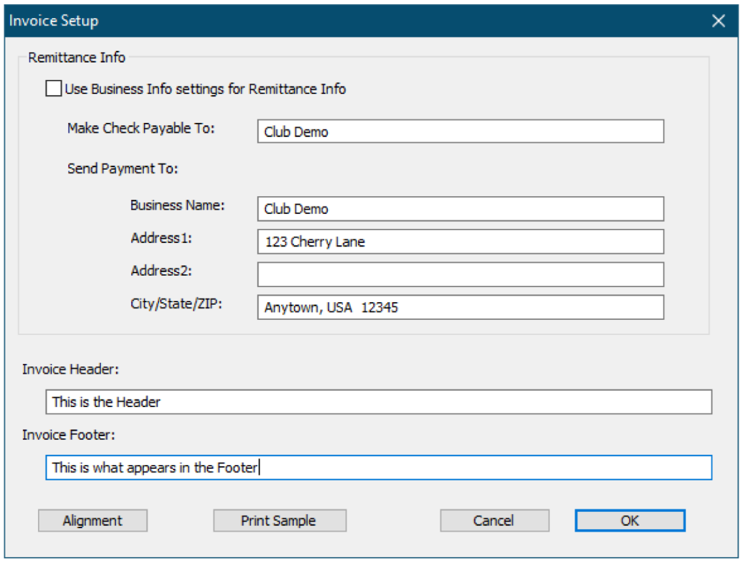
Check **Allow Members to charge to account** if you want to allow members to make charges on their account.

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

Select **Invoices** from the **Settings** menu.



Use Business Info settings for Remittance Info

Check this box to always use the Business Info settings in your invoices.

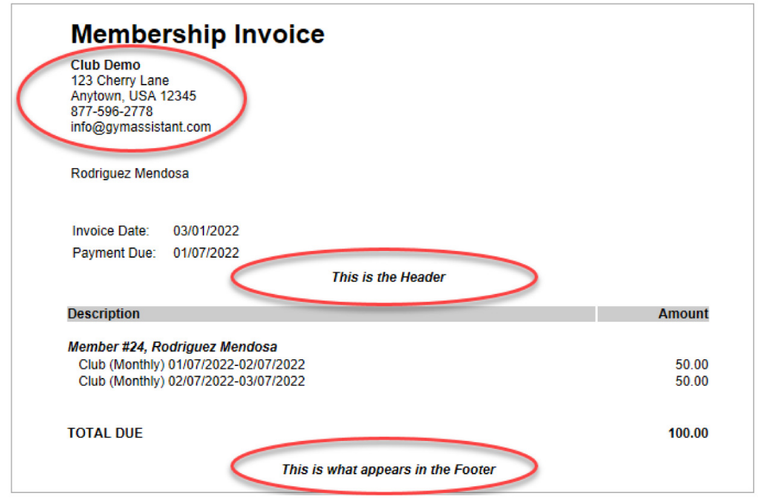
Uncheck this box if you want to specify a different address on invoices.

Invoice Header

This line will appear at the top of the invoice. (See below)

Invoice Footer

This line will appear at the bottom of the invoice. (See below)



Statements and Invoices 241

Settings – Reports and Printing

Membership Reports 52

Insurance Reports 53

Mailing Labels 53

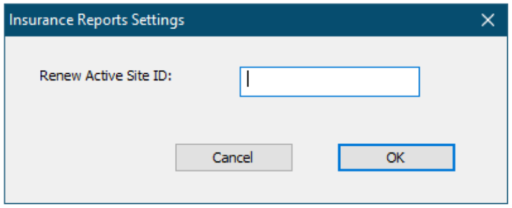
Membership Cards 53

Membership Reports

Please see Specifying Fields (Columns) for the Report 186 for detailed information on this topic.

Insurance Reports

Enter the **Renew Active Site ID**. This is the only value to set.



Mailing Labels

Please see Mailing Label Settings 232 for detailed information on this topic.

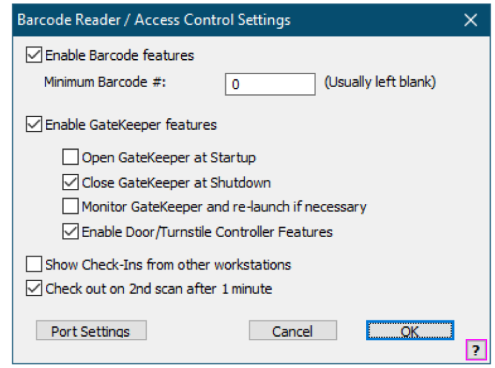
Membership Cards

Please see Membership Card Settings 236 for detailed information on this topic.

Settings – Hardware

Barcode Reader / Access Control

Select **Barcode Reader / Access Control** from the **Settings** menu.



Enable Barcode features

Check this box to hide the **Barcode** button in the View Member Info window.

Minimum Barcode #

Set this value if you want to restrict the minimum barcode number.

*Note: Barcode numbers and Member numbers must be unique, you cannot have barcode that is also a member number. There should not be an overlap between **Barcode** numbers and **Member** Numbers. If you are generating your own barcode numbers then set this value above your maximum possible member number.*

Enable GateKeeper Features

Uncheck this box if you are not using GateKeeper.

Open GateKeeper at Startup

Check this box to not start GateKeeper when Gym Assistant starts.

Close GateKeeper at Shutdown

Check this box to not start GateKeeper when Gym Assistant exits.

Monitor GateKeeper and re-launch if necessary

Check this box to monitor GateKeeper and start it up again if GateKeeper shuts down.

Note: Only check this box if requested by Gym Assistant Support.

Enable Door/Turnstile Controller Features

Check this box to display the **Open Gate** button in the View Member Info window.

Show Check-Ins from other workstations

Check this box to display check-ins that occur on other networked workstations.

Checkout on 2nd Scan

Check this box to automatically checkout members if they scan a barcode while they are on-site. This allows you to use the same reader for both check-in and check-out.

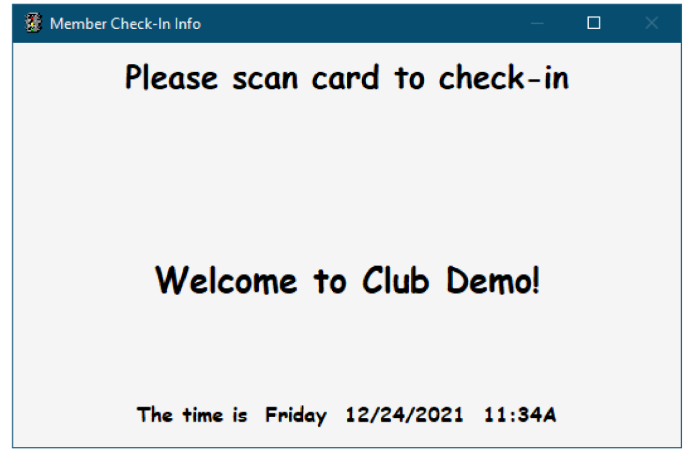
PhotoCapture

Please see Photo Capture Setup 118.

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.

While GateKeeper is idle (no one is checking in) the Member display shows a basic "Welcome" message.



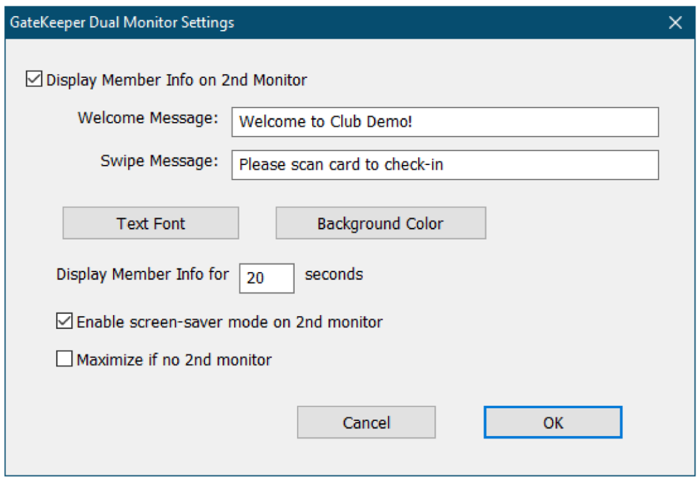
When a member checks in by scanning a card his info will be displayed.

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 Monitors Setup

The dual monitor functionality is controlled by GateKeeper, but you can change settings from within Gym Assistant.

In Gym Assistant or GateKeeper select **Dual Monitors** from the **Settings** menu.



Check **Display Member Info on second Monitor** to enable the dual monitor window.

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 Second Monitor text.

Click **Background Color** to change the background color for the Second 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.

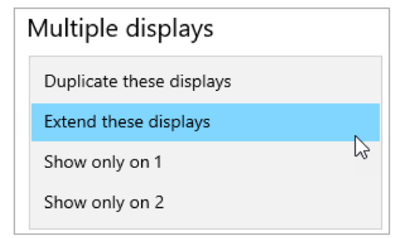
If **Enable screen-save mode on 2nd monitor** is checked then after five minutes of idle time the second monitor will display the Swipe Message in random locations on a black background. This will prevent monitor burn-in on older monitors.

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.

Dual Monitors System Requirements

In order to take advantage of the Dual Monitor feature you must have multiple monitors attached to your computer and Windows must be setup to Extend the displays. To set this up:

- Minimize all windows, then right-click on the Desktop.
- Select **Display Settings**
- Scroll down to Multiple Displays and set to **Extend these displays**.



Extending the display to both monitors basically enlarges your desktop to cover both monitors. You can move any window and the mouse between the two monitors as if they were a single large desktop. However, this can cause confusion if the second monitor is pointed at incoming members (and away from front-desk staff), as basically the mouse will disappear to the user.

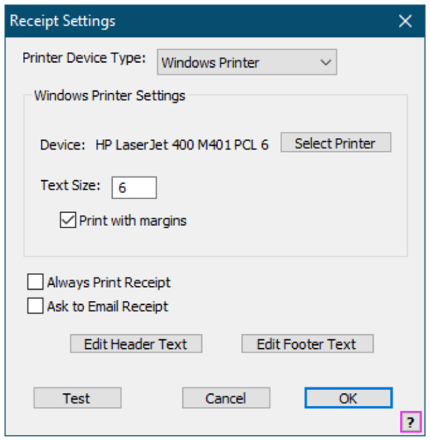
One really cool feature of our Dual Monitor functionality is that while the 2nd monitor window is displayed GateKeeper will prevent the user from moving the mouse to the second display.

Receipt Printing

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

Select **Receipt Printing** from the **Settings** menu.



Printer Device Type

Select a printer type: **Windows Printer** or **Serial Printer**

Always Print Receipt

Check this box to always print a receipt by default. (You can always check the **Print Receipt** box when finishing each transaction.)

Ask to Email Receipt

Check this box to always ask to email a receipt when finishing each transaction.

Windows Printer Settings

Device

Displays the currently selected printer (or "-Default Printer-" if using the default Windows Printer.

Select Printer

Click to select a different printer or change the printer settings.

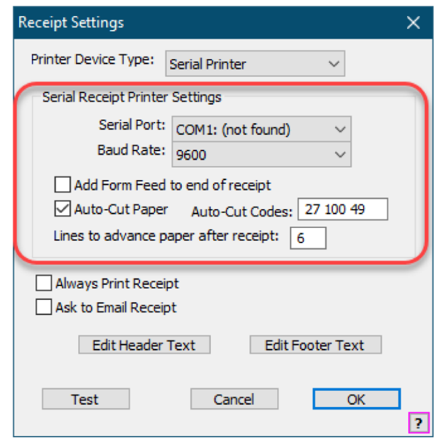
Text Size

Text Size to print on receipts.

Print with Margins

Check this box to add margins to the boundary of the receipt.

Serial Receipt Printer Settings



Serial Port / Baud Rate

Communications settings for the printer.

Add Form Feed to End of Receipt

Check this box to always advance the paper

Auto-Cut Paper

Check this box to have the printer automatically cut the paper.

Auto-Cut Codes

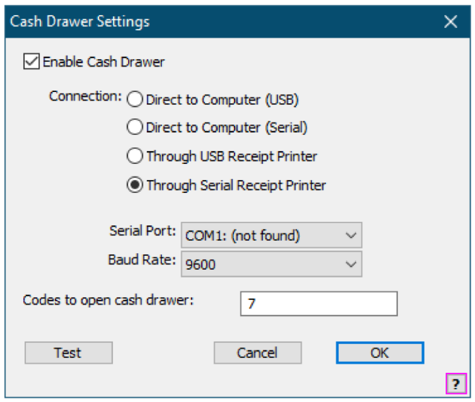
Numeric codes required to cut paper on your printer.

Lines to advance paper after receipt

Indicates how much paper to advance after printing.

Cash Drawer

Select **Cash Drawer** from the **Settings** menu.



Enable Cash Drawer

Check this box to enable Cash Drawer functionality.

Connection

Select the type of connection for your cash drawer.

For a serial (RS232) connection, select the **Serial Port**. Leave the **Baud Rate** at 9600.

Test

Click this button to test the current settings.

Configuring a USB Receipt Printer to Open Drawer 62

Configuring USB Printer as a Serial Device 64

Configuring a USB Receipt Printer to Open Drawer

If your cash drawer is connected to a USB receipt printer then you can configure the printer to open the cash drawer whenever a receipt prints.

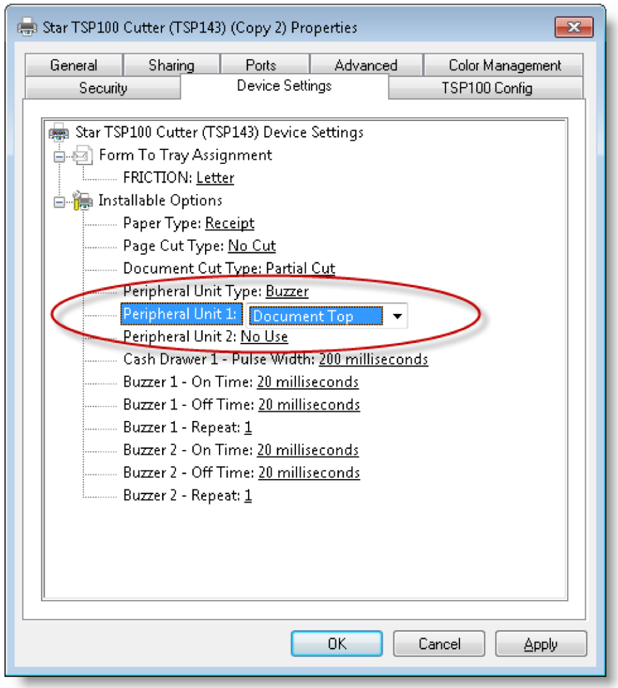
Note: The instructions below describe the steps to configure a Star TSP100 printer. Your printer may be slightly different, but the general concept is the same.

For optimal control of the cash drawer connected to a Star TSP100 printer, configure your printer as a Serial device. See Configuring the Star TSP100 USB Printer as a Serial Device 64.

Go to **Devices and Printers**

Right-click on the Star TSP1XX printer and select **Printer Properties**.

Click the **Device Settings** tab.



Set **Peripheral Unit 1** to “Document Top”.

Click **Apply**.

Switch to Gym Assistant.

Select **Open Cash Drawer** from the **Utilities** menu. A short blank receipt will print, and the cash drawer should open.

For optimal control of the cash drawer connected to a Star TSP100 printer, configure your printer as a Serial device. See *Configuring the Star TSP100 USB Printer as a Serial Device* 64

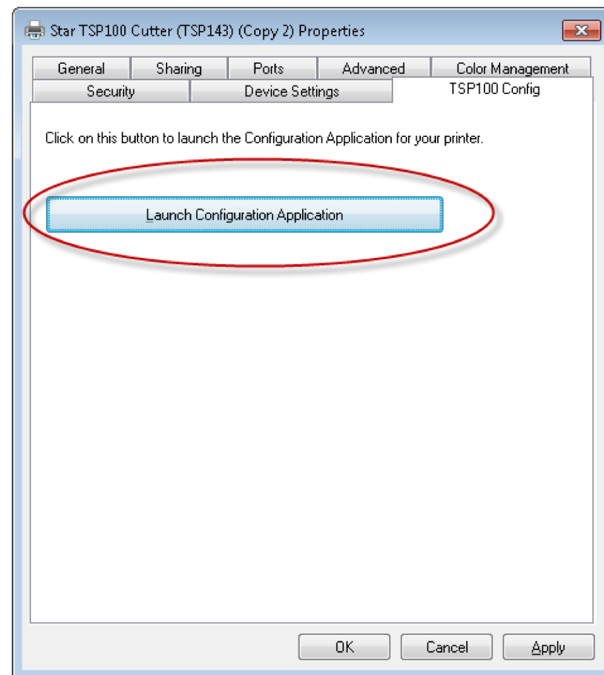
Configuring USB Printer as a Serial Device

Most Windows-based receipt printers can be configured to automatically open a cash drawer whenever a receipt is printed. This is easy to setup, but it does not give Gym Assistant optimal 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.

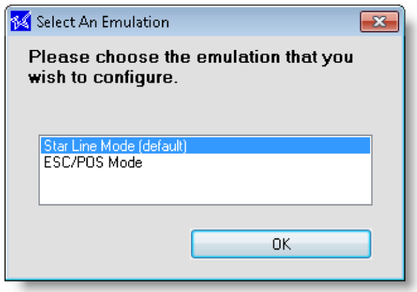
Bring up Properties for your receipt printer.

- Go to **Devices and Printers**
- Right-click on the Star TSP1XX printer and select **Printer Properties**.

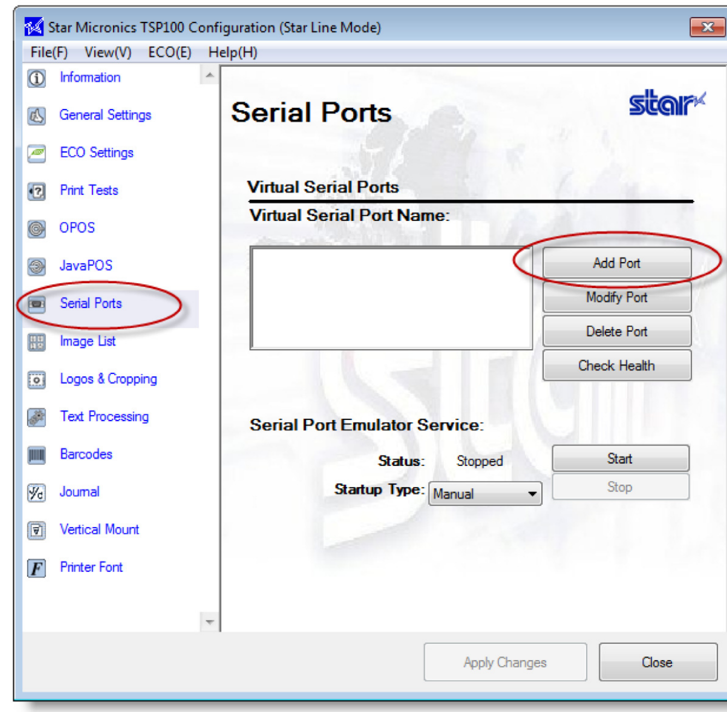
Click the **TSP100 Config** tab.



Click **Launch Configuration Application**.

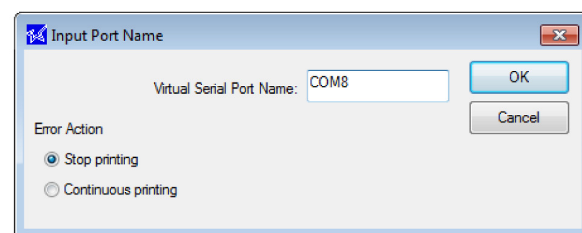


Make sure that **Select Star Line Mode (default)** is selected and click **OK**.

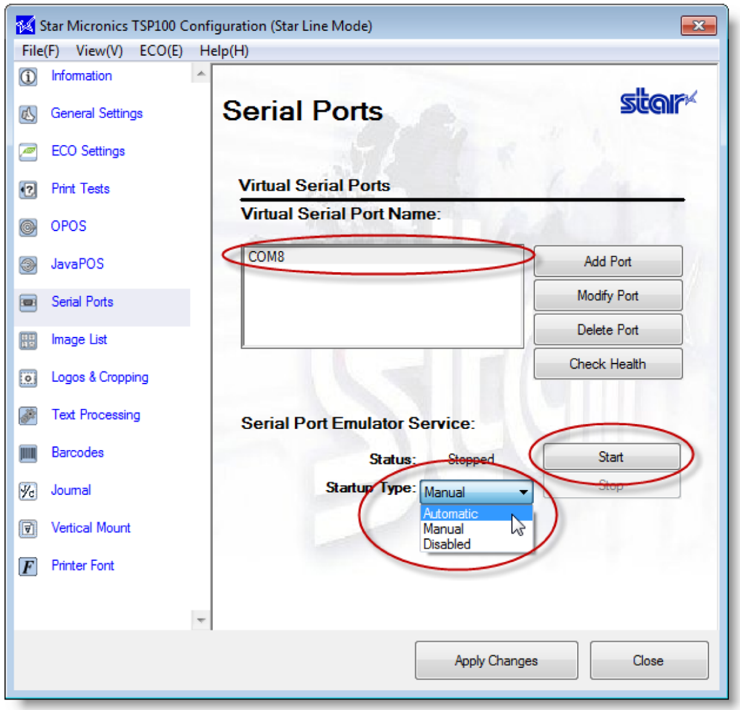


Click **Serial Ports** (on the left).

Click **Add Port**.



Set the **Virtual Serial Port Name** to “COMX”, where X is any unused serial port number. Then click **OK**.



Click on the newly-created port.

Set Startup Type to **Automatic**.

Click **Start**. Status should change to “Running”.

Click **Apply Changes**.

Click **Check Health**. The utility should report “Check Health Completed Successfully”.

Click **Close**.

You can now setup the receipt printer as a serial device. Note the COM port number that you created.

Settings – Administration

Backup and Restore 68

Business Information 68

BackOffice Functions 69

Attachments 70

Email 70

Online Connect 70

Password and Users 71

Workstations 72

Networking / Data Path 270

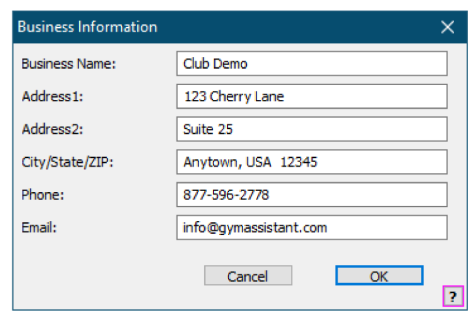
Language / Time / Date 73

Backup and Restore

See Backup Settings 255.

Business Information

Enter your business information.

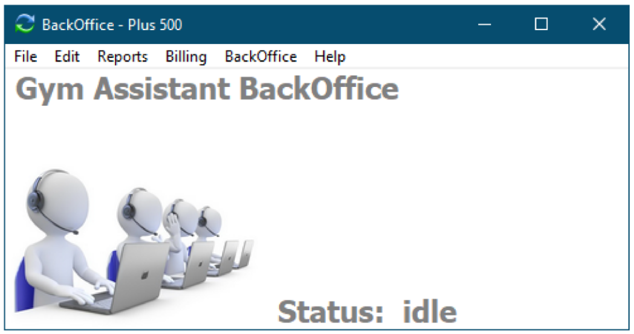


Email will be used as the default return email address in all sent emails unless you specifically set a **Reply To Address** in Email Settings 70.

BackOffice Functions

The **BackOffice** application performs time-intensive tasks in the background, so you can continue using Gym Assistant without interruption.

BackOffice Window:



BackOffice icon:

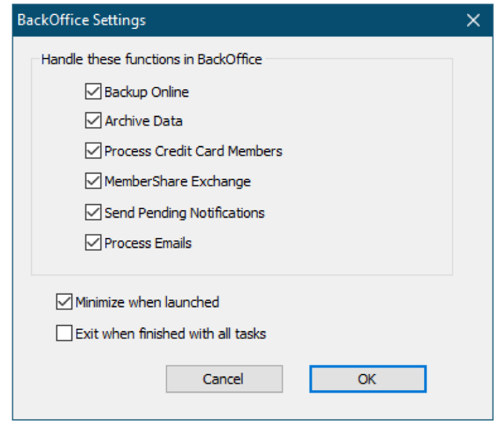
The BackOffice window is hidden by default.

To display the BackOffice application select **BackOffice** from the Utilities menu or click on the BackOffice icon in the taskbar.

Note: The BackOffice icon may not display in the taskbar if the taskbar is configured to combine taskbar buttons. You may need to click on the Gym Assistant icon, which will then show all of the Gym Assistant windows.

BackOffice Settings

Click **BackOffice** from the **Settings** menu.



Check the box for each Gym Assistant function that should use the BackOffice Application.

Minimize When Launched

Check this box to hide the BackOffice window when it is launched.

Exit when finished with all tasks

Check this box to exit the BackOffice application when it is not needed.

Attachments

See Attachment Settings 244.

Email

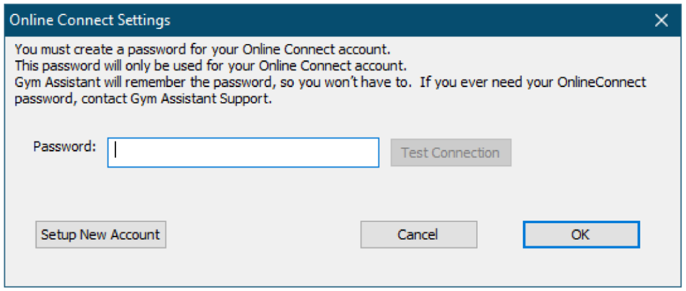
See Email Settings 249.

Online Connect

Online Connect is Gym Assistant's direct connection with the GymAssistant.com web server. Online Connect provides many functions from within the software:

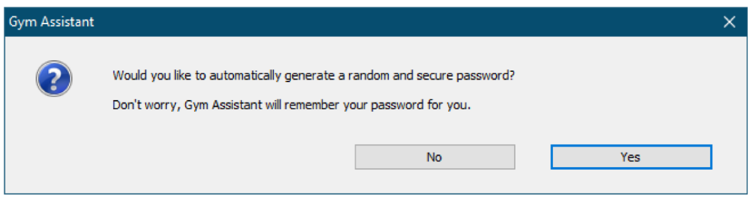
- Automatic Software Updates
- Automatic online data backup (and restore)
- Sending emails and SMS messages through gymassistant.com mail server

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**.

Gym Assistant will remember whatever password is set for your account, so we suggest that you let Gym Assistant remember it for you. If you ever need your OnlineConnect password, contact Gym Assistant Support.



Click **Yes** to generate a random password.

Click **No** to create your own password.

- 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. If you ever need your OnlineConnect password, contact Gym Assistant Support.

Click **Test Connection** to validate your connection.

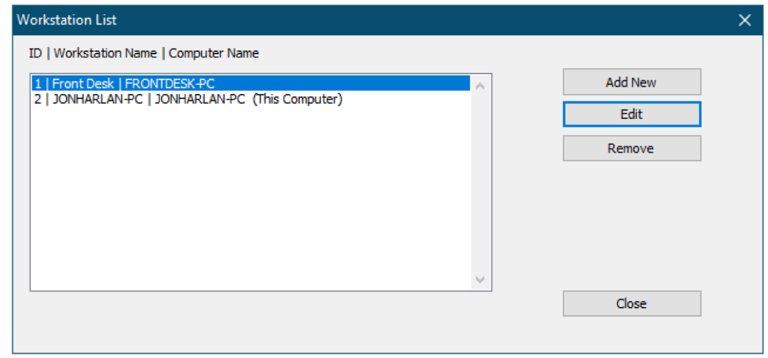
Password and Users

See Setting Up Users and Groups 264

Workstations

Journal and Visits log entries can show the workstation on which the entry occurred.

Select **Workstations** from the **Settings** menu.

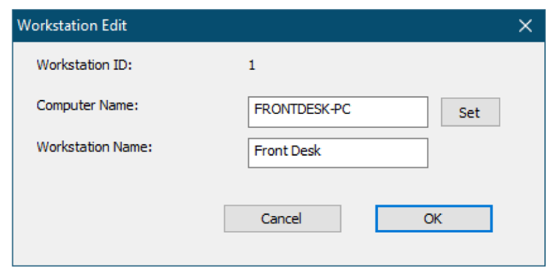


Add New

Add a new workstation.

Edit

Edit the selected workstation



Computer Name: The network name for this workstation. Click **Set** to set with this computer's name

Workstation Name: The workstation name that will appear in Gym Assistant

Settings

4

Remove

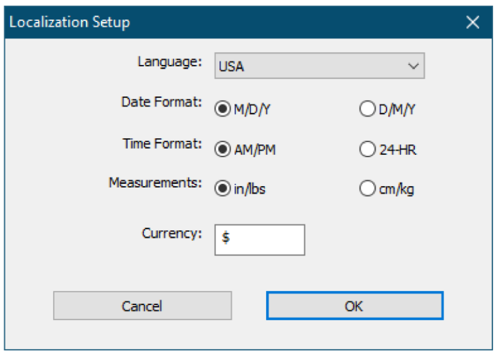
Remove the selected workstation

Networking / Data Path

See Networking Settings 270.

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”.

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

You can define up to 128 membership types.

There are three different Membership Types.

Member Management

5

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).

Editing Membership Types 77

Membership Plan Options 78

Punchcard Plan Payment Options 80

Day-Pass Plan Payment Options 82

Advanced Member Type Options 82

Membership Structure & Pricing

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Editing Membership Types 77

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Advanced Member Type Options 82

Membership Add-Ons

Any member can also have different add-ons, for which they will pay either monthly or as-used.

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.

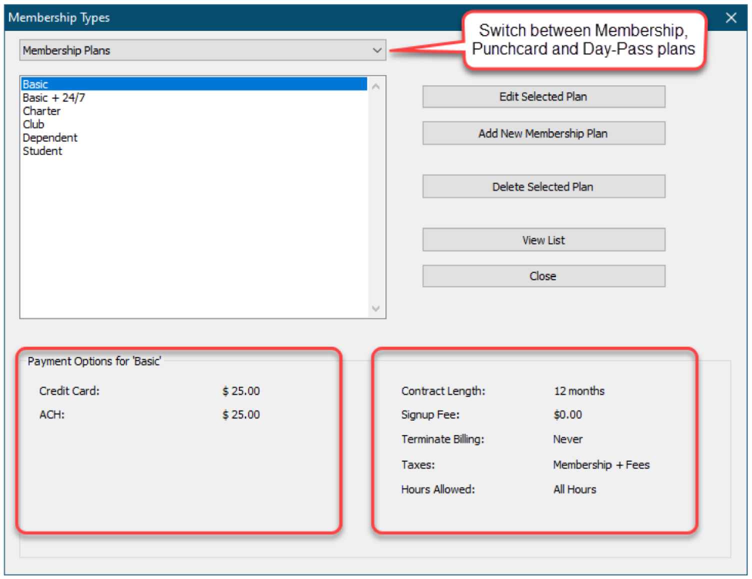
Punchard Add-Ons

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 automatically every time the member enters the facility. Punchcard Add-On credits are not deducted automatically, but must be registered individually at the front-desk.

Editing Membership Types

To edit your Membership Types select **Membership Plans** from the **Settings** menu.



Switch between **Membership** plans, **Punchcard** plans and **Day-Pass** plans by clicking on the list button.

Click on a plan in the list to show the options for that plan below the list.

Click **Edit Selected Plan** to edit the selected membership plan. (See Membership Plan Options 78)

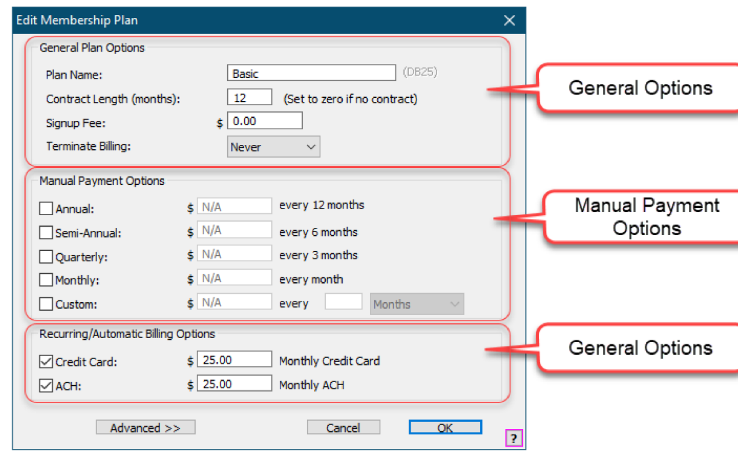
Click **Add New Membership Plan** to add a new membership plan. (See Membership Plan Options 78)

Click **Delete Selected Plan** to delete the selected plan.

Note: You cannot delete a membership plan if any members are attached to that plan.

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

Membership Plan Options



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 default 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 default 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.

Here are some examples of typical settings for **Contract Length** and **Terminate Billing**:

Example #1: A month-to-month membership with no contract

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

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

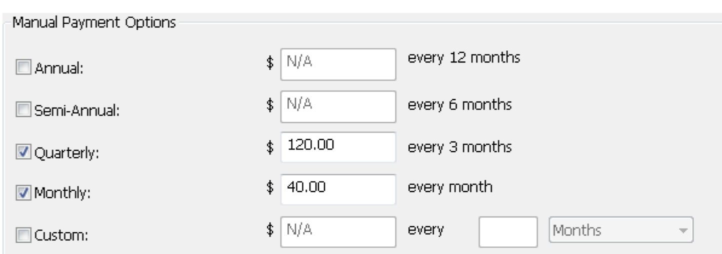
Set the Contract Length to 6 Months and the Terminate Billing value to "Never".

Example #3: A 2-week trial membership

Set a payment period of 2 weeks and set Terminate Billing value to "At Due Date".

Membership Plans - 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.



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.)

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.)

Membership Plans - Recurring 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).

Punchcard Plan Options 80

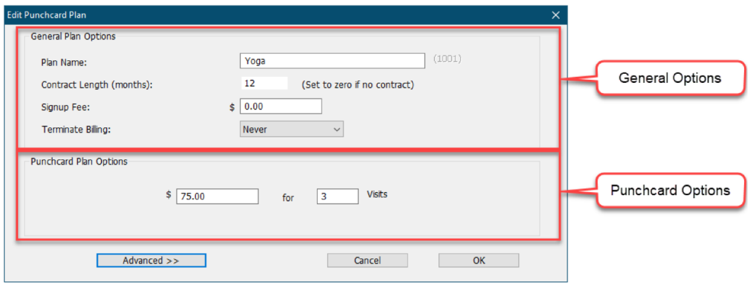
Day-Pass Plan Options 82

Advanced Member Type Options 82

Punchcard Plan Options

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

A member with a Punchcard Plan will purchase a package of entries into the club.



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, she is automatically denied entry.

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

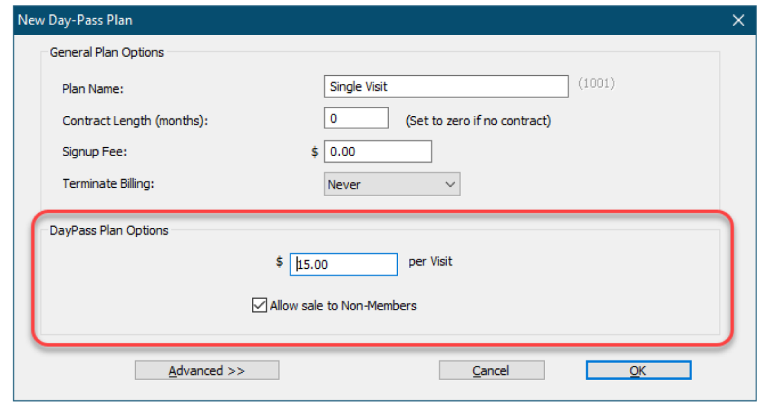
Note: A Punchcard Plan has the common General Plan Options and an additional price for a package of visits.

Membership Plan Options 78

Day-Pass Plan Payment Options 82

Advanced Member Type Options 82

Day-Pass Plan 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).

Enter the **Cost per Visit**, which is paid by the member on every visit.

Check the box for **Allow sale to Non-Members** to allow sale to non-members.

> *To sell a Day-Pass to a non-member select **Sell Day-Pass to Non-Member** from the **Utilities** menu.*

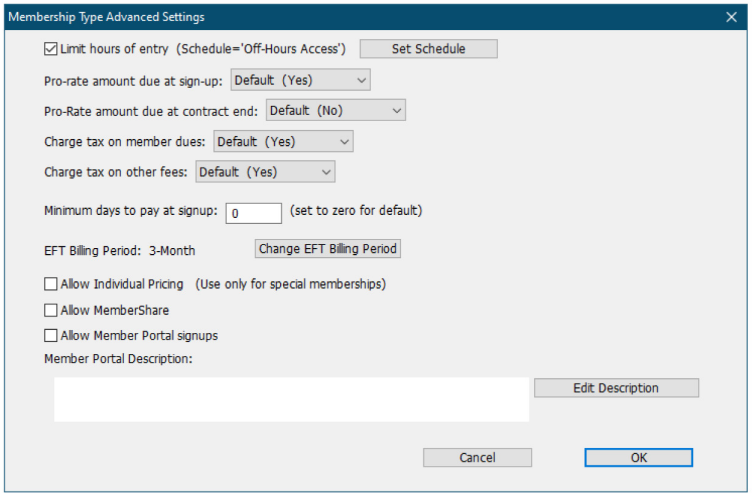
Membership Plan Options 78

Punchcard Plan Payment Options 80

Advanced Member Type Options 82

Advanced Member Type Options

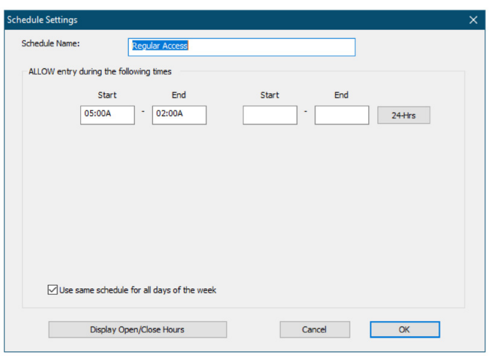
Advanced Member Type Options are no often used, but they can be very useful for special cases.



Limit Hours of Entry

Check this box to limit the hours during which members of this type can enter the club. (See Daily Schedules 39)

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



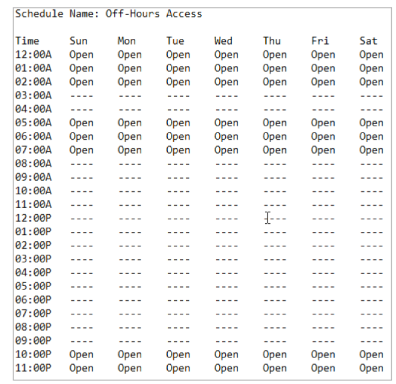
You can specify two allowed time periods for each day. For example, you might allow entry from 5am-7am in the morning and then 7pm-11pm at night.

If a Start/End period passes midnight then the time period extends to the next day. For example 10pm-2am on Friday would extend from 10pm Friday to 2am Saturday.

Click the **24-Hrs** button to allow entry at any time that day.

Uncheck the **Use same schedule for all days of the week** box to allow a different schedule for every day of the week.

Click **Display Open/Close Hours** to show a 24/7 display of when the when the current Schedule is active (below).



Schedule Name: Off-Hours Access

Time	Sun	Mon	Tue	Wed	Thu	Fri	Sat
12:00A	Open	Open	Open	Open	Open	Open	Open
01:00A	Open	Open	Open	Open	Open	Open	Open
02:00A	Open	Open	Open	Open	Open	Open	Open
03:00A	----	----	----	----	----	----	----
04:00A	----	----	----	----	----	----	----
05:00A	Open	Open	Open	Open	Open	Open	Open
06:00A	Open	Open	Open	Open	Open	Open	Open
07:00A	Open	Open	Open	Open	Open	Open	Open
08:00A	----	----	----	----	----	----	----
09:00A	----	----	----	----	----	----	----
10:00A	----	----	----	----	----	----	----
11:00A	----	----	----	----	----	----	----
12:00P	----	----	----	----	----	----	----
01:00P	----	----	----	----	----	----	----
02:00P	----	----	----	----	----	----	----
03:00P	----	----	----	----	----	----	----
04:00P	----	----	----	----	----	----	----
05:00P	----	----	----	----	----	----	----
06:00P	----	----	----	----	----	----	----
07:00P	----	----	----	----	----	----	----
08:00P	----	----	----	----	----	----	----
09:00P	----	----	----	----	----	----	----
10:00P	Open	Open	Open	Open	Open	Open	Open
11:00P	Open	Open	Open	Open	Open	Open	Open

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 — Never 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 — Never pro-rate for this membership plan.
- Yes — Always pro-rate for this membership plan.

Charge tax on member dues:

For each membership plan you can override the default for whether taxes will be charged on member dues. You have three choices:

- Default — Use whatever setting is specified in General Billing Options.
- No — Never charge taxes on memberships for this membership plan.
- Yes — Always charge taxes on memberships for this membership plan.

Charge tax on other dues:

For each membership plan you can override the default for whether taxes will be charged on other fees. You have three choices:

- Default — Use whatever setting is specified in General Billing Options.
- No — Never charge taxes on fees for this membership plan.
- Yes — Always charge taxes on fees for this membership plan.

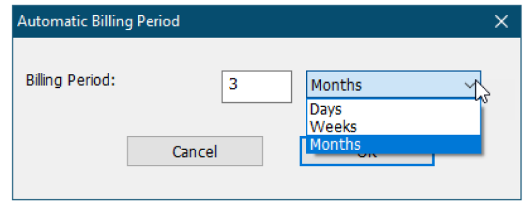
Minimum Days to Pay at Signup

For each membership plan you can choose to override the default Minimum Days to Pay at Signup found in **General Billing Options**. Set this value to zero to use the default.

EFT Billing Period

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

Click Change EFT Billing Period.



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.

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: See "Individual / Variable Pricing" for more information on variable pricing for membership plans.

Allow MemberShare

Check this box to allow members of this type access to other clubs with which you are linked with MemberShare. (MemberShare requires an active MemberShare license.)

Allow Member Portal signups

Check this box to allow members to signup for this membership type online. (Online signup requires an active Online Member Portal account.)

Member Portal Description

Click the Edit Description button to edit the description that appears in the Online Member Portal for member signups. (Online signup requires an active Online Member Portal account.)

Membership Plan Options 78

Punchcard Plan Payment Options 80

Day-Pass Plan Payment Options 82

Adding New Members

The Gym Assistant license that you purchased enables the software for a certain number of membership records. This limit is on the number 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.

Click the **Add New Member** button or select **Add New Member** from the **Member** menu.

If you are currently viewing a member record Gym Assistant will ask if you want to add a dependent or a new member.

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

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

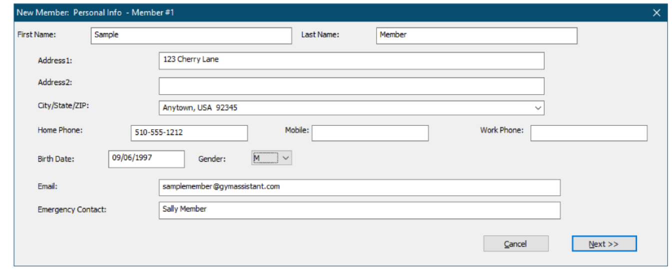
New Member - Personal Information 88

New Member - Contract Information 89

New Member - Financial Info 91

New Member - Finishing 92

Personal Information



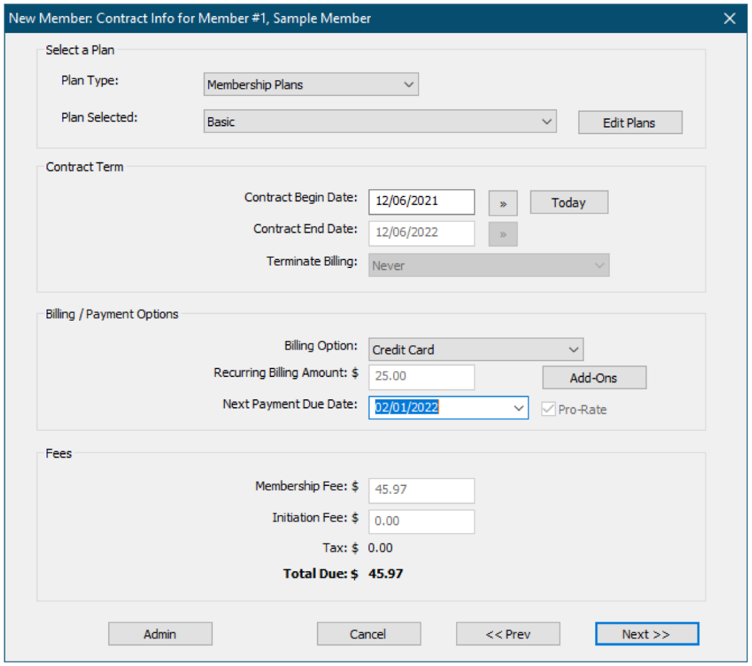
If you are adding a dependent member then the address and emergency contact info will be filled in automatically.

Note:Only the First and Last name fields are required.

Click **Next** to continue.

New Member - Contract Information 89

Contract Information



Select a **Membership Plan**.

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

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

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**.

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

> *Note: The **Billing Option** field displays only the billing options available for the selected membership plan.*

Recurring Billing Amount field automatically fills with the correct value for the selected membership plan and billing option.

Next Payment Due Date is when the member's next payment will be due. Click on the small arrow to the right of the **Next Payment Due Date** field or by simply type in a new date.

To save when entering in a date:

- Leading zeros are not required.
- Year is not required, if date is in the current year.
- Only two digits are required for year, if the year is after 2000.

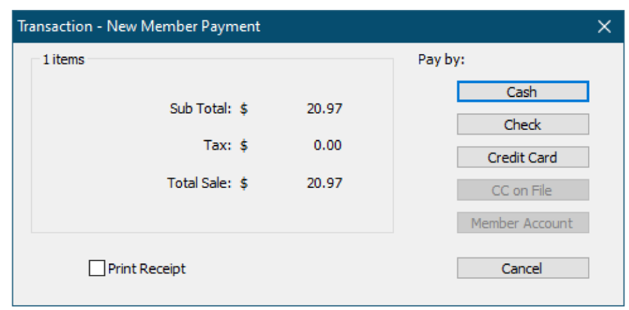
For example, you can enter the date for Feb 12, 2021 as "2/1/21" or even just "2/1".

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

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

Press the **Enter** key or click **Next** to continue.

New Member - CC Info 91



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.

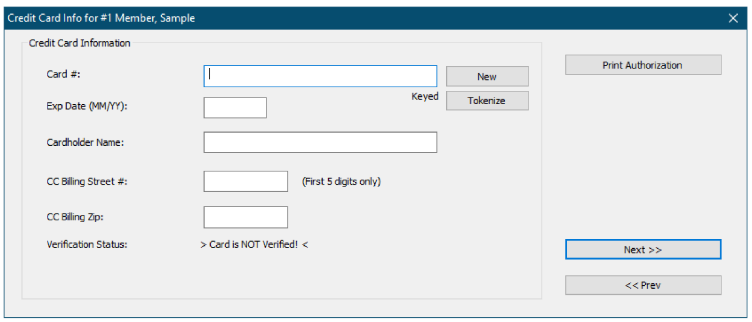
***CC on File** will only be enabled if you have saved a CC for this member.*
Member Account will only be enabled if you have set

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

New Member - CC Info

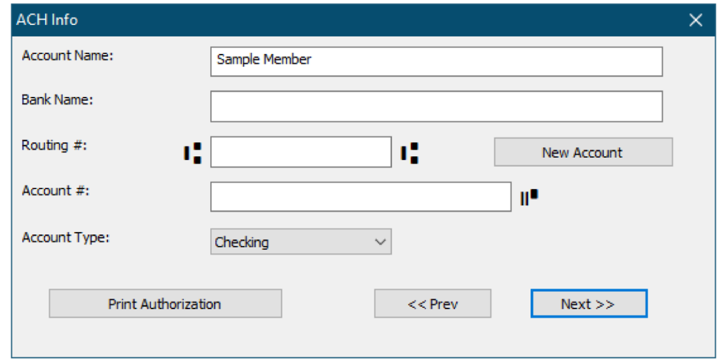
If this member has a recurring billing option of (**Credit Card** or **ACH**), then you will next enter the member's **Credit Card Info** or **ACH Info** for recurring billing.

Member Credit Card Info



Enter the member's credit card info, or swipe their card through a magstripe reader.

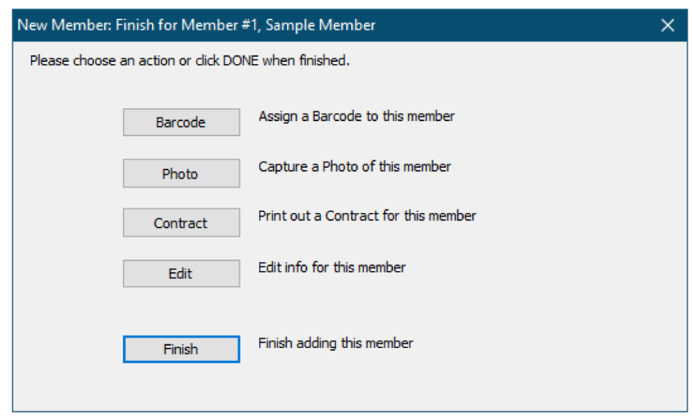
Member ACH Info



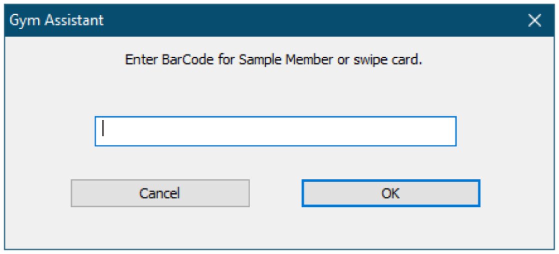
Click **Next** to continue.

Finishing Information

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



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).

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

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

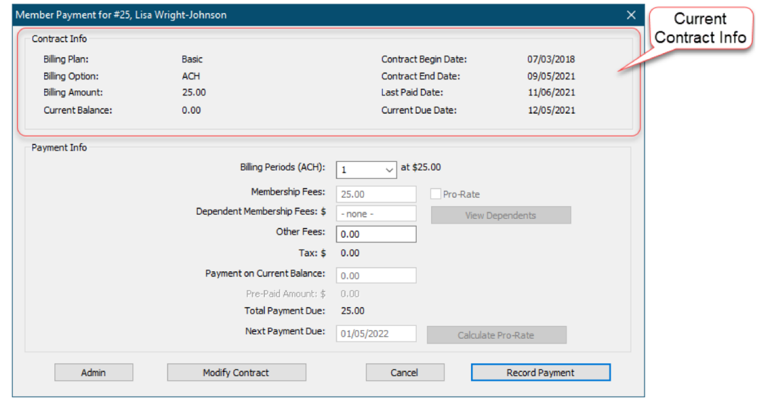
Click **Edit** to go back and manually edit the member's information.

Click **Finish** when done.

Recording a 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 Pro-Rate**. 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.

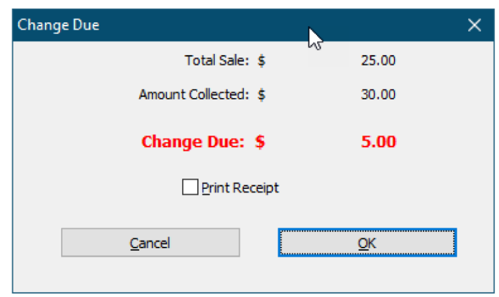
Completing a Transaction with Cash, Check, or Charge

The **Transaction - Member Payment** window will appear.

There are five possible methods to collect money for any transaction:

Cash Remittance

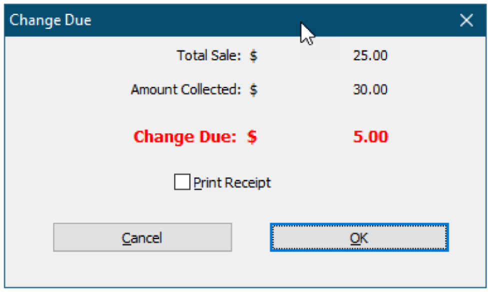
In the Transaction window click Cash (or press the 'A' key) to accept a cash payment.



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

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.

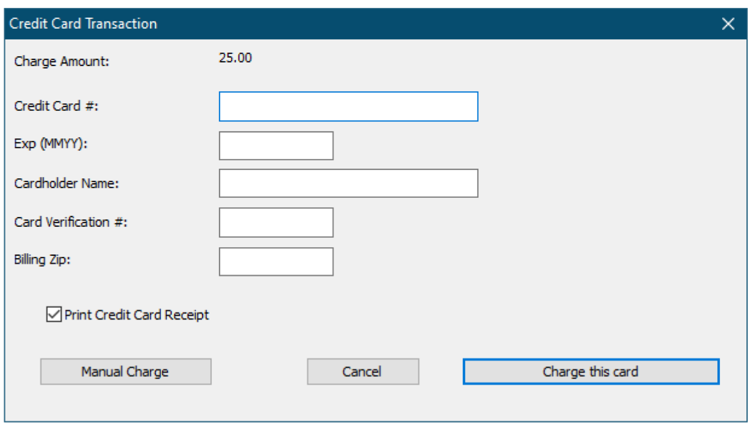


Just click OK to close the Change Due window.

Check Remittance

Enter the check number, and click OK.

Credit Card



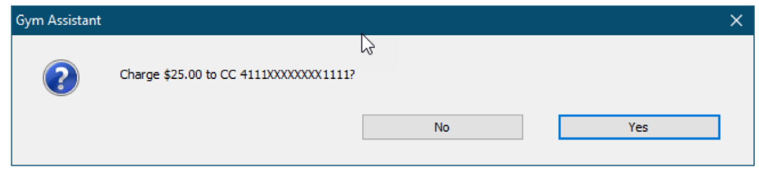
If you have a USB credit card reader swipe the card through the reader or just enter the credit card information.

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.

CC on File

This option is only available if the member has a credit card on-file.



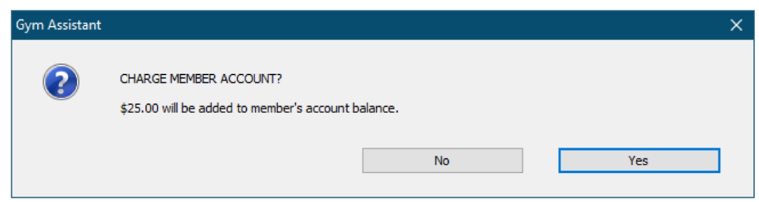
After confirming, the member credit card on-file will be charged.

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.

This option is only available if the currently displayed member has a Billing Status of Active.

Click **Yes** to confirm the charge to the member's account.



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.

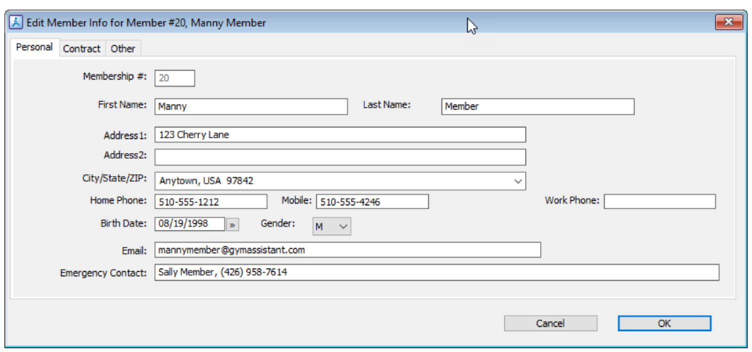
To edit a member's record directly click **Edit Member Record** or select **Edit Member Record** from the **Member menu**.

Personal Info Tab 99

Contract Info Tab 100

Other Info Tab 102

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.

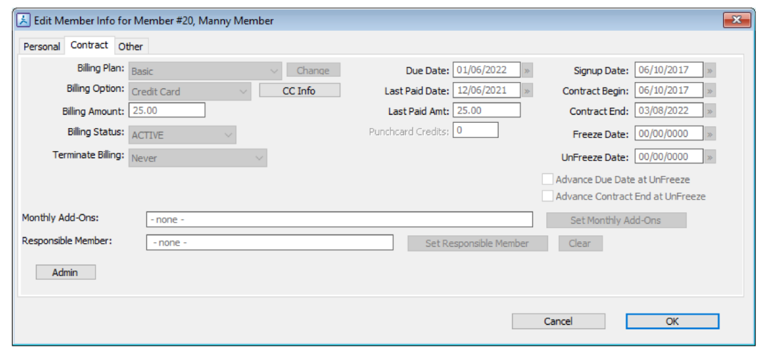
Gym Assistant can maintain a pre-filled list of often-used **City/State/Zip** entries.

- 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 100

Other Info Tab 102

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 password with Member Admin privileges.

To change the **Billing Plan** for a member click **Change**.

Modify a Member Contract 101

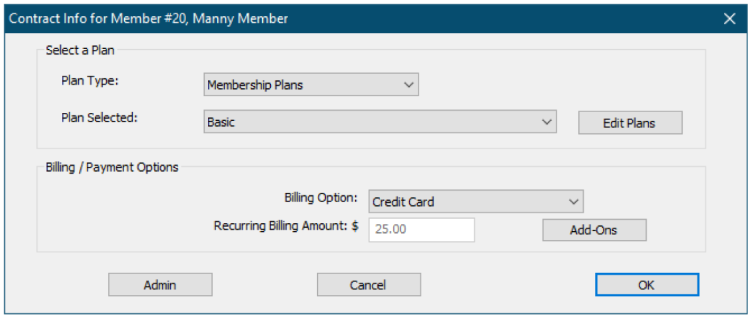
Personal Info Tab 99

Contract Info Tab 100

Other Info Tab 102

Modify a Member Contract

The **Contract Info** window will appear.



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

> *Note: The **Billing Option** 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: Edit Plans will change your pricing structure for **ALL** members, not just the current member.*

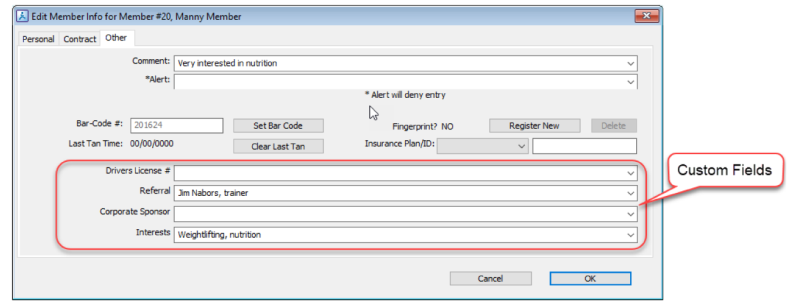
Personal Info Tab 99

Contract Info Tab 100

Other Info Tab 102

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: **<u>Any</u>** text in the Alert field will cause a member to be denied entry.*

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.

Insurance Plan/ID

Select a member's **Insurance Plan** and enter the member's **Plan ID**.

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.

Personal Info Tab 99

Contract Info Tab 100

Other Info Tab 102

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 fixed price for the entire family (e.g. $70/month for up to 4 family members)
- with added fees 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.

Viewing Linked Members 104

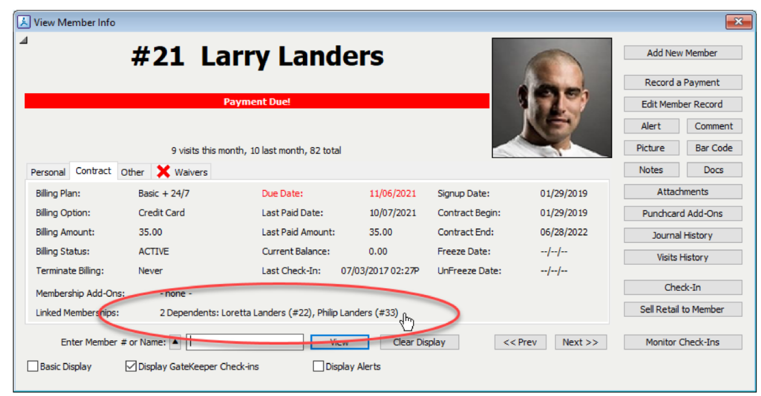
Adding a Dependent Member 105

Linking to a Responsible Member 106

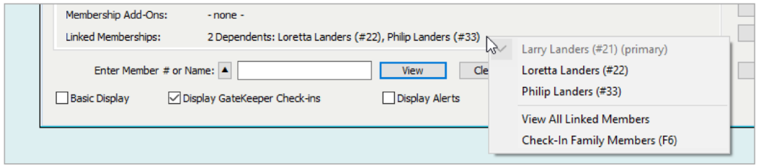
Checking In Family Members 108

Viewing Linked Members

Any linked members will appear in Linked Memberships field of View Member Info window.

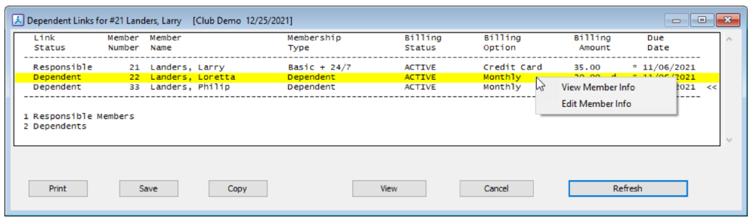


Click the **Linked Memberships** field to display a list of all linked members.



Select on one of the linked members to display that member.

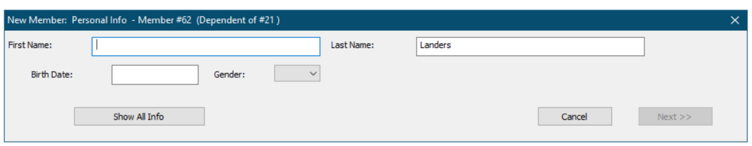
Select **View All Linked Members** to display a list of the linked members.



In this list you can right-click on any member to view or edit that member. You can also double-click on the list to view that member.

Adding a Dependent Member

While viewing a member record click **Add Member**, then select **Add a Dependent**. (Or select **Add Dependent Member** from the **Member** menu.)



Enter the member's basic information.

Note: The member last name and address info is automatically filled with the responsible member's last name.

To set all of the dependent member's personal info click **Show All Info**.

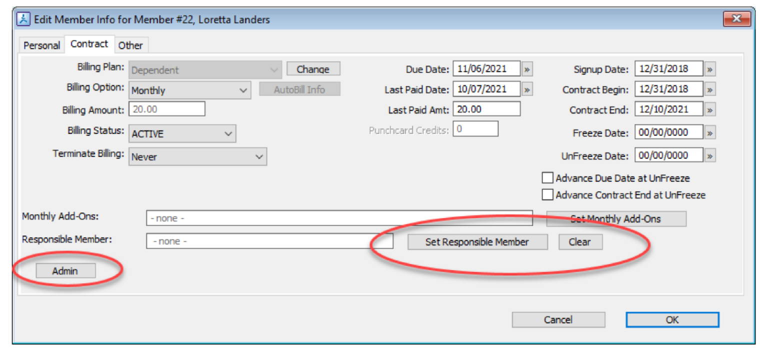
Click Next to continue adding the new member.

Note: All family members must have the same Due Date and Billing Period (monthly, annual, etc.) (though not necessarily the same Billing Option.

Linking to a Responsible Member

Note: All family members must have the same Due Date and Billing Period (monthly, annual, etc.) (though not necessarily the same Billing Option.

While viewing a member record click **Edit Member Record** or select **Edit Member Record** from the **Member** menu.

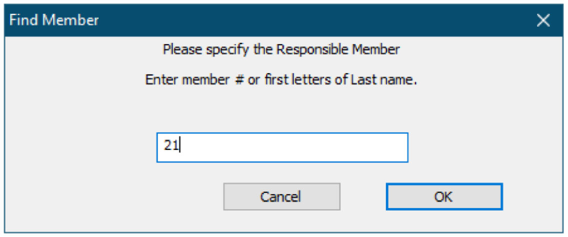


In the **Contract** tab, click **Admin** to enable all of the Contract fields.

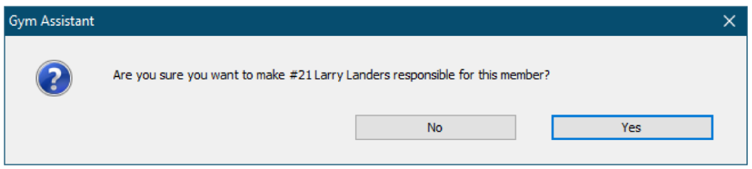
Linking to a Responsible Member

Click **Set Responsible Member**.

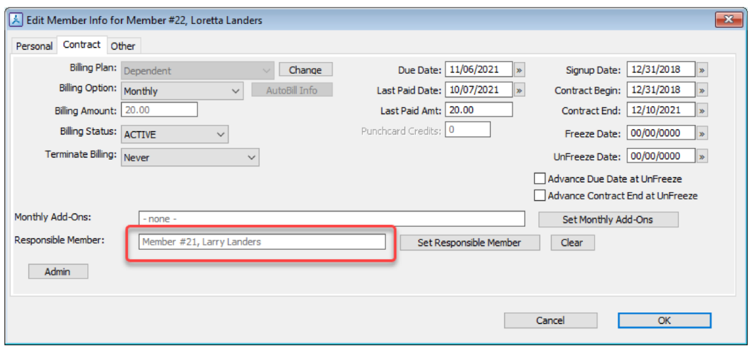
Enter the membership number or name of the primary member who will be responsible for payment and click **OK**.



Confirm by clicking **Yes**.



The **Responsible Member** should now be displayed.



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

Unlinking from a Responsible Member

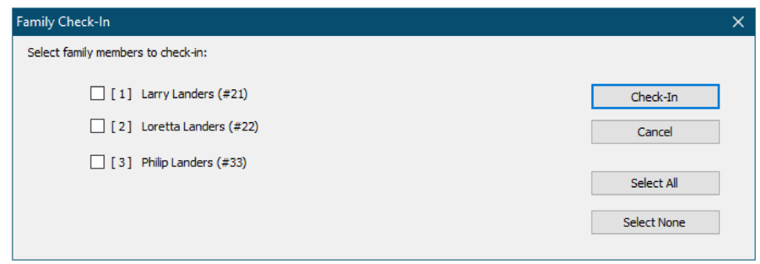
Click **Clear**.

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

Checking In Family Members

While viewing a member record there are three ways to quickly check-in all family members at one time.

- Select Check-In Family Members from the Utilities menu
- Click the Linked Memberships field, then select Check-In Family Members
- Press the **F6** key on the keyboard



Select the family members who are checking in, then click **Check-In**.

- Check the box next to a member to select/unselect.
- Press the number key on the keyboard (e.g. 1, 2, 3) next to the member to select/unselect.
- Click **Select All** or **Select None**.

Member Financial Information

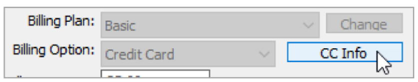
Gym Assistant only stores financial information for members with a recurring billing option of **ACH** or **Credit Card**.

Updating Member CC/ACH Information

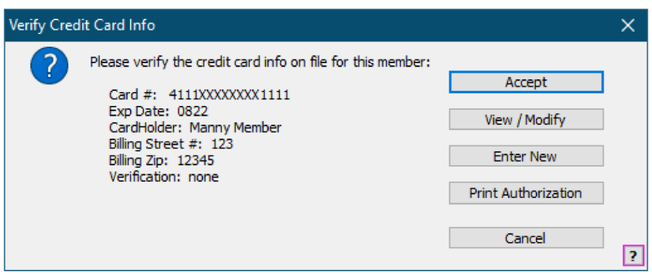
There are three ways to access a member's financial info:

- Click on the **Billing Option** field.

- Select **Update Financial Info** from the **Member** menu.
- While editing a member's record click **CC Info**.



The member's current card or ACH information will be displayed (with sensitive info masked for security reasons).



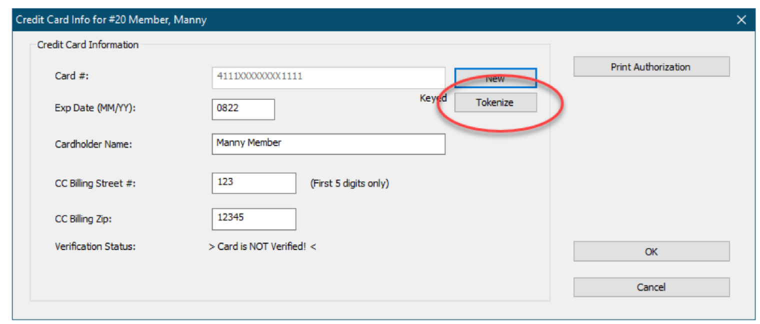
- Click **Accept** to keep the current card info.
- Click **View/Modify** to edit the current info (e.g. to update the card expiration date).
- Click **Enter New** to enter information for a new credit card.
- Click **Print Authorization** to print an authorization form for your members to sign.

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

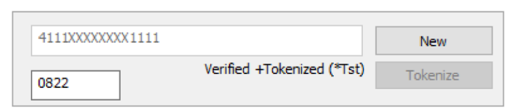
Tokenizing Financial Information

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.

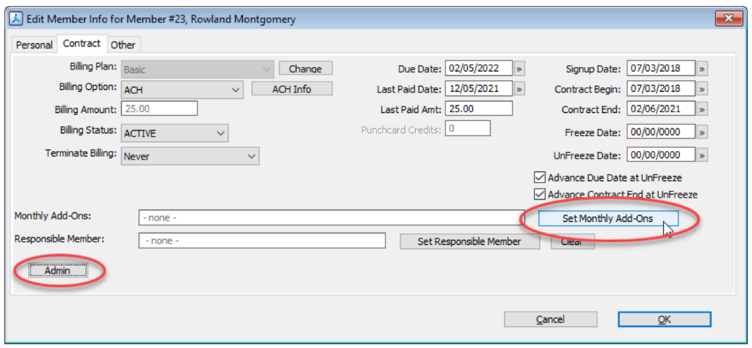


Monthly Add-Ons

A **Monthly Add-On** is a fixed amount added to the member's regular monthly billing. Examples of Monthly Add-Ons would include monthly locker rental, unlimited tanning and 24-hour access.

You can set Monthly Add-Ons for a member while editing the member. (See Edit Member Record 99)

Click on the **Contract** tab.



Click **Admin** to enable all of the contract fields.

Click **Set Monthly Add-Ons**.

Check the boxes for the add-ons that you want to set for this member, then click **OK**.

Click **Edit Monthly Add-On Settings** to create new or edit existing add-ons.

Monthly Add-Ons 33

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 112

Purchasing a New Punchcard 114

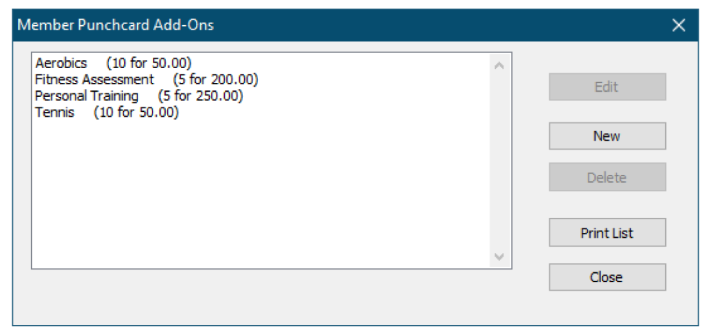
Purchasing Additional Credits for an Existing Punchcard 115

Recording Usage of Punchcard Credits 115

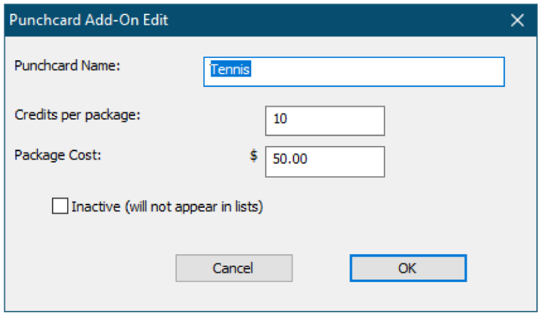
Other Member Punchcard Functions 117

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.



Enter a **Name** for the add-on (e.g. “Tanning”, “Personal Training”, “Spinning”, etc.).

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

Enter the **Cost** for each package.

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

Click **OK** to finish.

Purchasing a New Punchcard 114

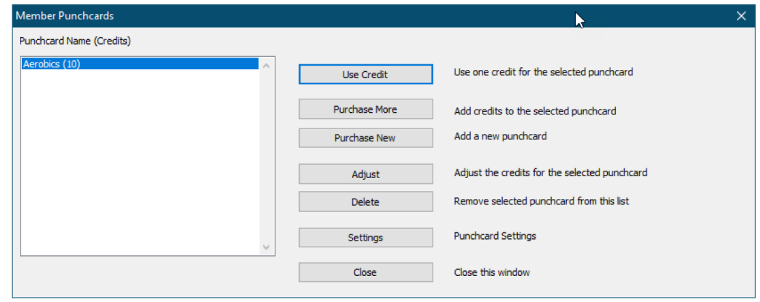
Purchasing Additional Credits for an Existing Punchcard 115

Recording Usage of Punchcard Credits 115

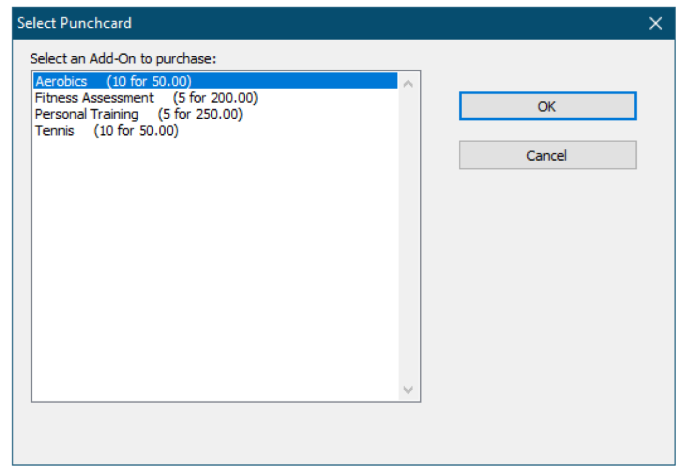
Other Member Punchcard Functions 117

Purchasing a New Punchcard

While viewing a member record click the **Punchcard Add-Ons** button.



Click **Purchase New**.



Select which add-on to purchase, then click **OK**.

Setting up Punchcard Add-Ons 112

Purchasing a New Punchcard 114

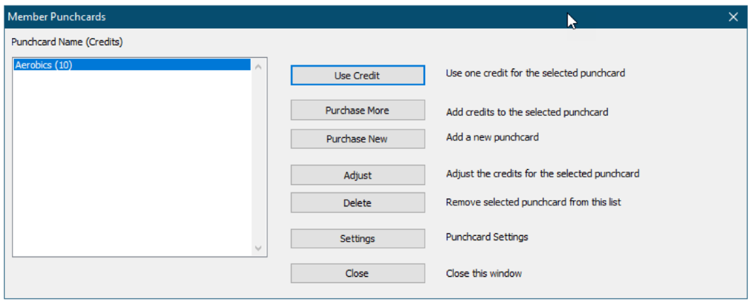
Purchasing Additional Credits for an Existing Punchcard 115

Recording Usage of Punchcard Credits 115

Other Member Punchcard Functions 117

Purchasing Additional Credits for an Existing Punchcard

While viewing a member record click the **Add-Ons** button.



Select the Add-On for which to add credits and click **Purchase More**.

Setting up Punchcard Add-Ons 112

Purchasing a New Punchcard 114

Purchasing Additional Credits for an Existing Punchcard 115

Recording Usage of Punchcard Credits 115

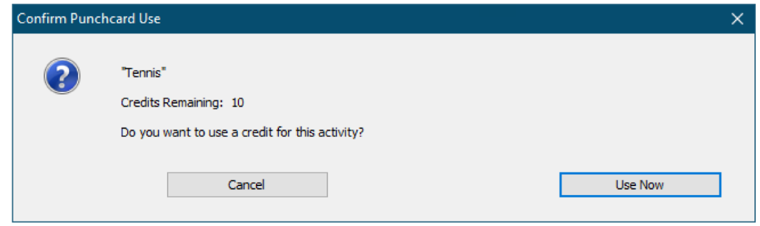
Other Member Punchcard Functions 117

Recording Usage of Punchcard Credits

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

While viewing a member record click the **Add-Ons** button.

Select the Add-On for which to record a credit used and click **Use Credit**.



Click **Use Now**.

The number remaining credits for the member's punchcard will be displayed.

Setting up Punchcard Add-Ons 112

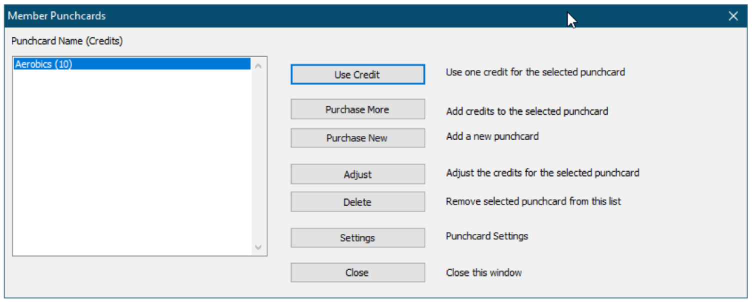
Purchasing a New Punchcard 114

Purchasing Additional Credits for an Existing Punchcard 115

Recording Usage of Punchcard Credits 115

Other Member Punchcard Functions 117

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.

Setting up Punchcard Add-Ons 112

Purchasing a New Punchcard 114

Purchasing Additional Credits for an Existing Punchcard 115

Recording Usage of Punchcard Credits 115

Other Member Punchcard Functions 117

Photo Capture

Gym Assistant can capture member photos for display with a member's Check-In information.

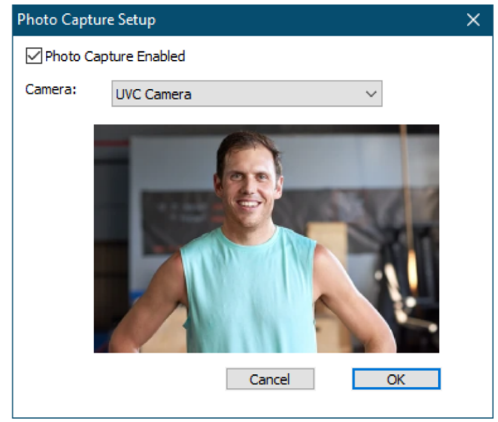
Note: PhotoCapture requires a webcam and a valid PhotoCapture Add-On license.

Photo Capture Setup 118

Editing a Member Picture 118

Photo Capture Setup

Select **Photo Capture** from the **Settings** menu.



Check the **Photo Capture Enabled** box.

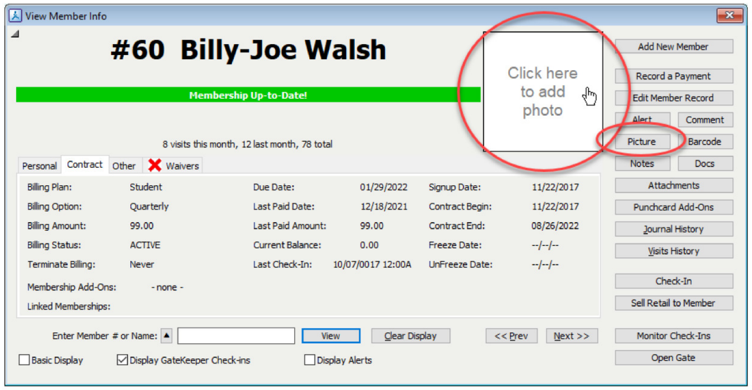
The PhotoCapture functionality must be purchased with Gym Assistant. If you have not yet entered your PhotoCapture registration code you will have to enter the code now before continuing.

Select a **Camera** from the list. The selected camera stream should appear.

Click OK when finished.

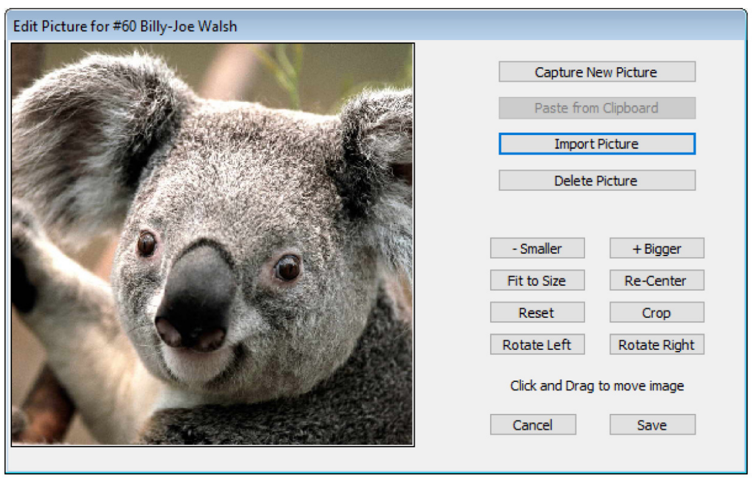
Editing a Member Picture

While viewing a member record click the **Photo Box**, click the **Picture** button or select **Picture** from the **Member** menu.



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](118).

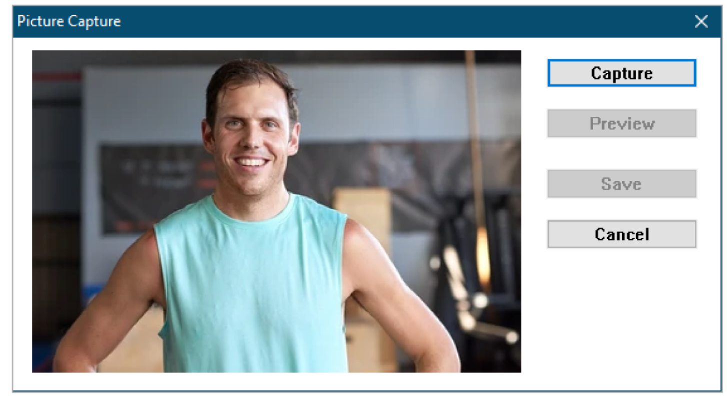
While viewing a member record click the **Photo Box**, click the **Picture** button or select **Picture** from the **Member** menu.



Capturing / Importing a New Picture

Capture New Picture

The **Picture Capture** window will appear.



Click **Capture** or press the Spacebar to freeze the image, then click **Save** or press the Spacebar again to save the image.

Click **Preview** to unfreeze the image and return to the live view.

Import Picture

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

The software will remember the last folder from which you imported.

Paste from Clipboard

Copy an image to the Clipboard from any application, then click the **Paste** button.

Editing the Picture

Delete Picture

Delete the current picture.

Smaller / Bigger

Make the picture small or bigger.

Fit to Size

Reduce the picture size to fill the frame vertically.

Re-Center

Click and drag the picture to move in the frame.

Click Re-Center to center the picture in the frame.

Reset

Undo any changes to the picture and revert back to the original.

Crop

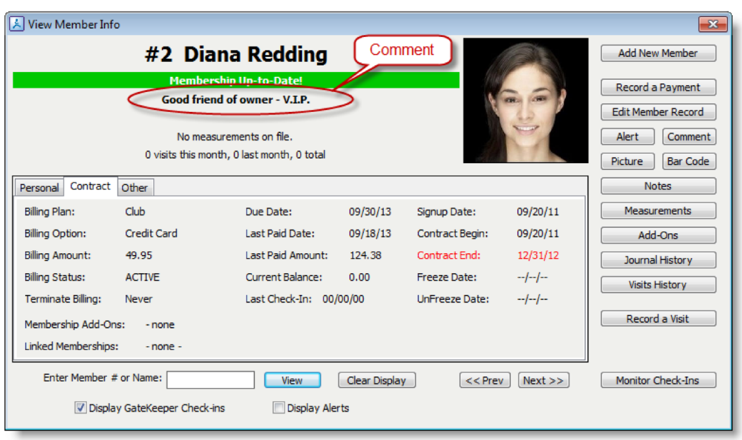
Crop the picture at the current dimensions and position.

Rotate Left / Right

Rotate the image clockwise / counterclockwise by 90 degrees.

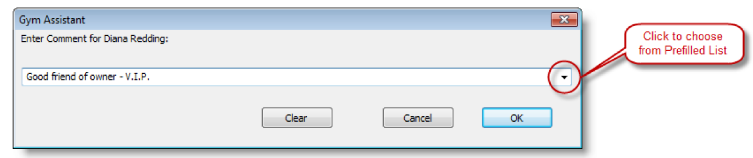
Comments

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 for display, but comments will also be included in Find Member. (see Member Lookup) 24)

To enter a member comment while viewing a member's record click **Comment** or select **Comment** from the Member menu.
Or if a member already has a comment just click on the comment to edit.

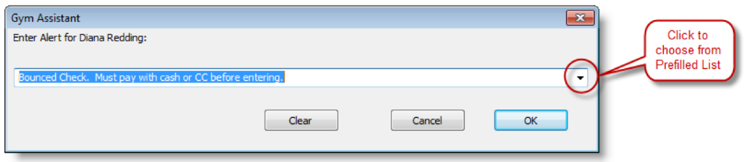


The Edit Comment window has a pre-filled list on the right so you can choose from often-used comments. (See "Pre-Filled Lists" elsewhere in this document.)

Alerts

An alert will stop a member from entry into the club. Alerts are for 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.
Or if a member already has a comment just click on the comment to edit.

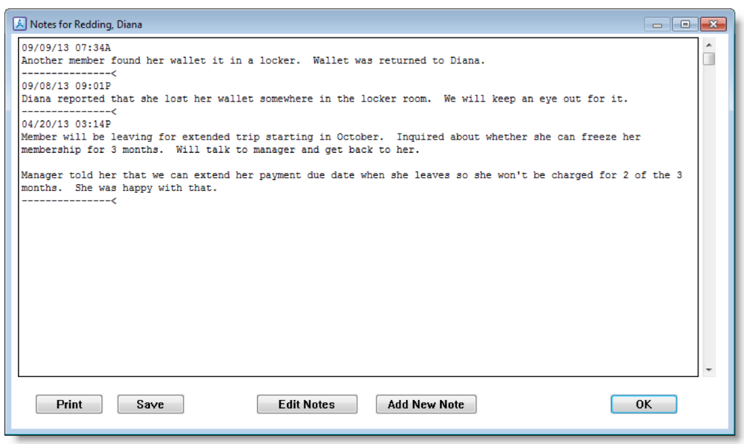


The Edit Alert window has a pre-filled list on the right so you can choose from often-used alerts. (See "Pre-Filled Lists" elsewhere in this document.)

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.

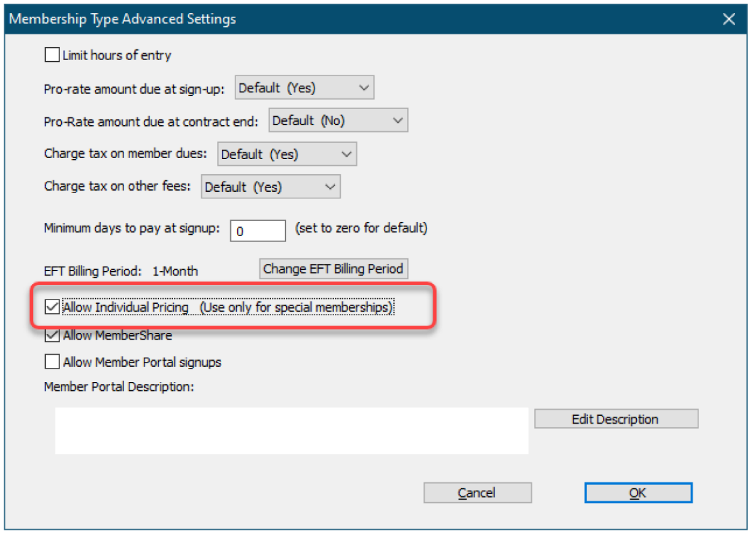
Individual pricing must be enabled for any membership plan for which you want to it available. You must then turn on individual pricing for each member that will have a special billing amount (rather than the default billing amount for the membership plan).

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

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

Check the box for **Allow Individual Pricing** then click **OK**.



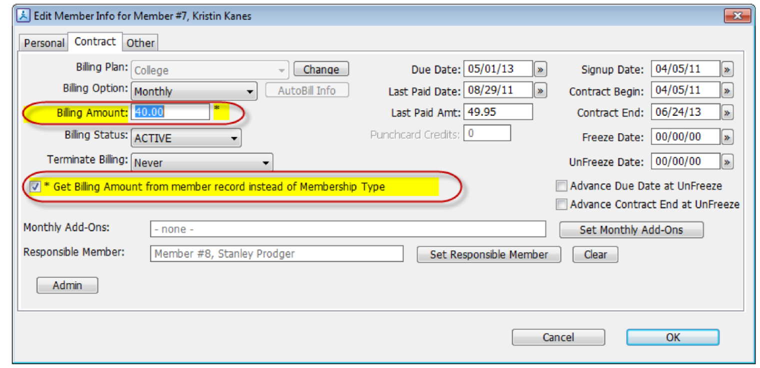
Turning on Individual Pricing for a Member

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

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

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

Check the box for **Get Billing Amount from member record instead of Membership Type**.

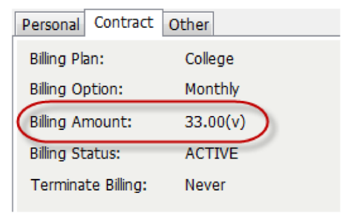


The checkbox and **Billing Amount** fields will highlight in yellow to indicate that pricing for this member will not be set from the membership plan.

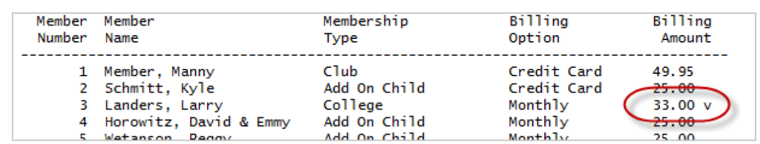
The **Billing Amount** field is now enabled and the recurring billing amount for this member can be set to any value.

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

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



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



Member Number	Member Name	Membership Type	Billing Option	Billing Amount
1	Member, Manny	Club	Credit Card	49.95
2	Schmitt, Kyle	Add On Child	Credit Card	25.00
3	Landers, Larry	College	Monthly	33.00 v
4	Horowitz, David & Emmy	Add On Child	Monthly	25.00

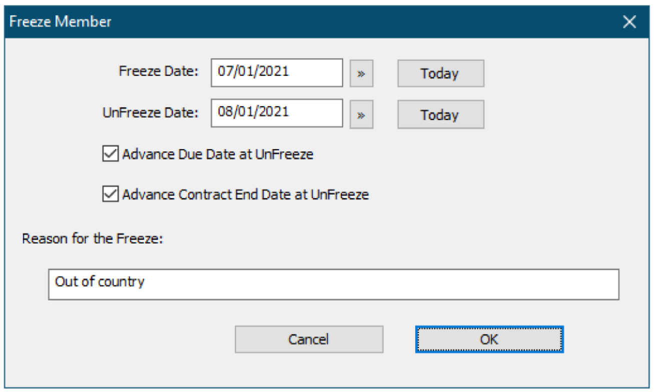
Freezing/Unfreezing Members

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.

Here is an example of freezing a member:

- The member will be on vacation during the month of July.
- Freeze Date would be July 1.
- Unfreeze Date would be August 1.

Select **Freeze Member Billing** from the **Member** menu.



Freeze Date

Date on which freeze should start

Unfreeze Date

Date on which freeze should be removed

Advance Due Date at UnFreeze

Check this box to have the member's Due Date automatically advanced on the unfreeze date.

Advance Contract End Date at UnFreeze

Check this box to have the member's Contract End Date automatically advanced on the unfreeze date.

Reason for the Freeze

Enter a description of the freeze. This description will be included in a note when the freeze is started.

Handling the End of a Membership

You have a number of ways to handle the end of a member's membership:

- Inactivate the member
- Set **Terminate Billing** to **At Next Due Date** or **At Contract Date**

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 an 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.

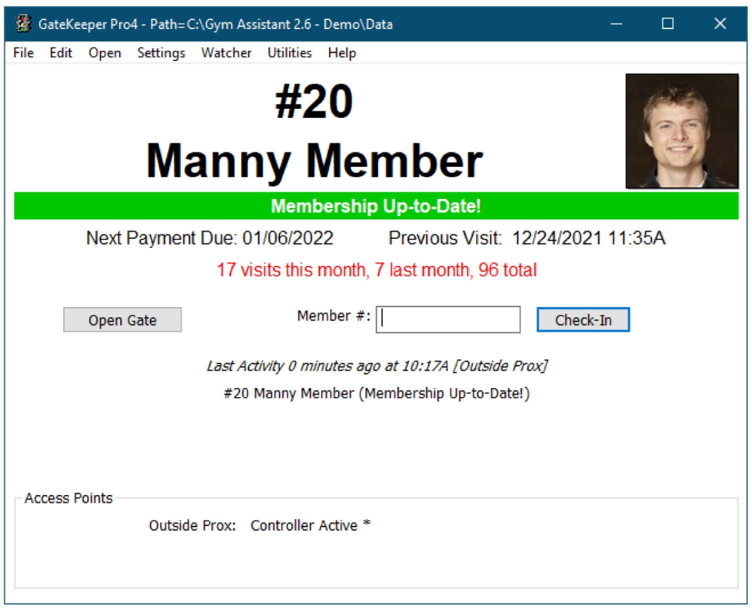
GateKeeper: Member Check-In

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.

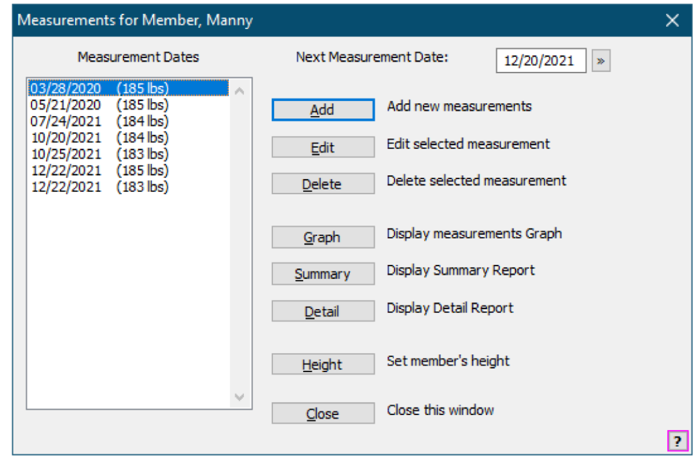
You can manually check in a member from the **View Member Info** window in Gym Assistant. Just enter the member’s name or number to display the member, then click **Record Visit**.

Please refer to GateKeeper documentation for how to setup and use that program.



Member Measurements

Select **Measurements** from the **Member** menu or press CTRL+M on the keyboard.



Add

Click to add a new measurement. (See Entering Member Measurements 131)

Edit

Click to edit the selected measurement. (See Entering Member Measurements 131)

Delete

Click to delete the selected measurement

Graph

Click to show a graph of this member's measurements. (See Member Measurements Graph 132)

Summary

Click to show a summary of this member's measurements. (See Member Measurements Summary 132)

Detail

Click to show a detail of this member's measurements. (See Member Measurements Detail 133)

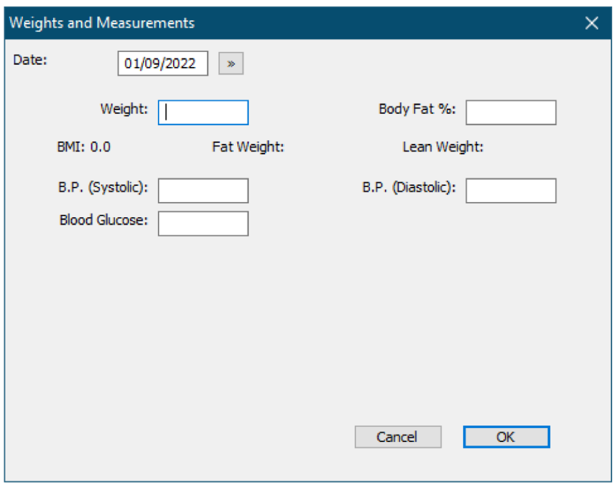
Height

Click to edit this member's height.

Measurements Settings 34

Entering Member Measurements

Enter measurments for the specified date.



Member Measurements 130

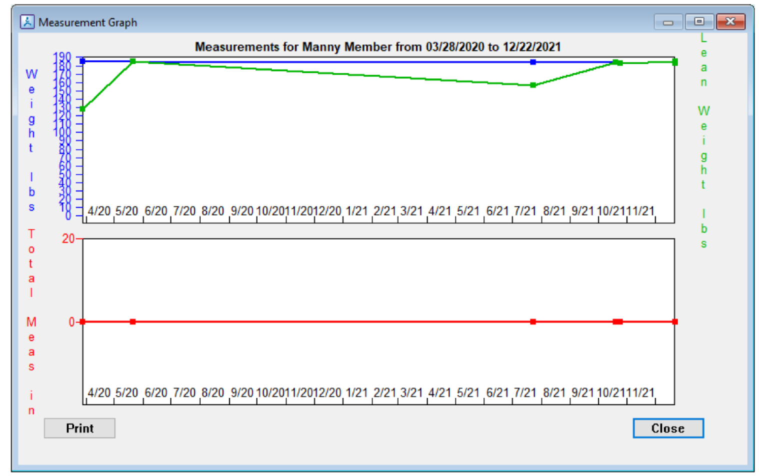
Member Measurements Graph 132

Member Measurements Summary 132

Member Measurements Detail 133

Member Measurements Graph

Member Measurements Graph



Entering Member Measurements 130

Member Measurements Summary 132

Member Measurements Summary

```
Weight/Measurements for Manny Member

All measurements in in unless indicated otherwise.

Begin Date:  03/28/2020
End Date:    12/22/2021

--- Weight -----------      Begin      End      Loss      Gain
Weight (lbs)               185.00   183.00      2.00
Body Fat %                  31.10     0.00     31.10
Fat Weight (lbs)            57.54     0.00     57.54
Lean Weight (lbs)          127.47   183.00               55.53
Body Mass Index (BMI)       24.41    24.14      0.26

--- Measurements -----      Begin      End      Loss      Gain
B.P. (Systolic)              0.00     0.00      0.00
B.P. (Diastolic)             0.00     0.00      0.00
Blood Glucose                0.00     0.00      0.00
                            -----    -----     -----     -----
Total Measurements           0.00     0.00      0.00
```

[Entering Member Measurements 130]

[Member Measurements Graph 132]

Member Measurements Detail

Date	Weight	Body Fat	B.P. (Sy	B.P. (Di	Blood Gl	Total
03/28/2020	185.00	31.10	-	-	-	0.00
05/21/2020	185.00	-	-	-	-	0.00
07/24/2021	184.00	15.00	101.00	82.00	35.00	0.00
10/20/2021	184.00	-	-	-	-	0.00
10/25/2021	183.00	-	-	-	-	0.00
12/22/2021	185.00	-	-	-	-	0.00
12/22/2021	183.00	-	-	-	-	0.00

[Entering Member Measurements 130]

[Member Measurements Graph 132]

[Member Measurements Summary 132]

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

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/resources/credit-card-processing-in-gym-assistant

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.

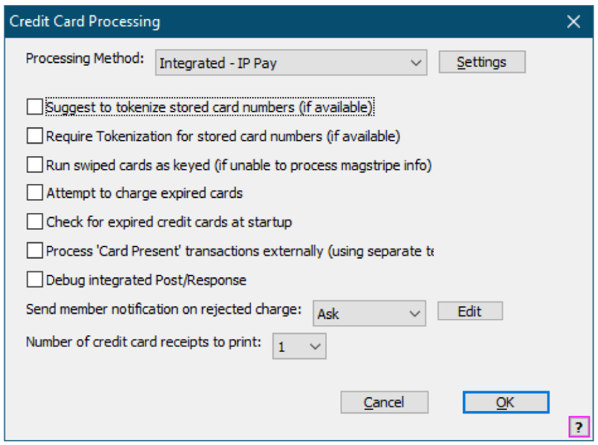
Batch Export

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 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.

Credit Card Settings

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



Processing method

Select your processing method. You will find further details about each processing method below.

Require Tokenization

Check this box to require that all stored credit card numbers are tokenized.

You should tokenize all card info to ensure the highest level of security for your members' credit card information and conform to PCI guidelines. (See "Tokenizing Card Information for Maximum Security" elsewhere in this document for more information about tokenizing credit card info.)

Run Swiped Cards as Keyed

Check this box to not submit swiped card info (Track 2 data) when a card is swiped.

Attempt to Charge Expired Cards

Check this box to submit expired cards when processing recurring billing or charging a member's card-on-file.

Check for Expired Credit Cards at Startup

Check this box to display a list of expired and soon-to-expire cards when Gym Assistant is started.

Process Card Present transactions externally

Check this box if you will not be processing manual credit card charges through Gym Assistant (e.g. if you have a desktop credit card terminal).

Debug Integrated Post/Response

Check this box only if requested by Gym Assistant Support.

Send Member Notification on Rejected Charge

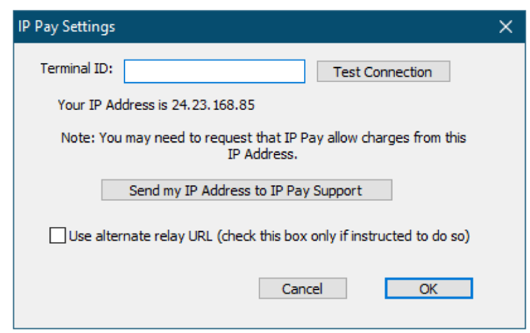
Specify whether Gym Assistant will automatically send an SMS notification to a member for a rejected credit card charge, whether Always, Never or Ask (for each batch). Click Edit to edit the content of the SMS notification. You can also edit the notification template by selecting Edit Document Templates from the Documents menu, then selecting SMS / Notifications.

Number of credit card receipts to print

Specify the Number of credit card receipts to print.

Integrated – IP Pay

IP Pay is a Credit Card and ACH processor that provides an online gateway and online reporting.



Terminal ID

You should obtain your Terminal ID from IP Pay.

Click **Test Connection** to test that your Terminal ID is correct.

Note: IP Pay must explicitly add your computer IP address to their system before you can submit transactions.

Send my IP Address to IP Pay Support

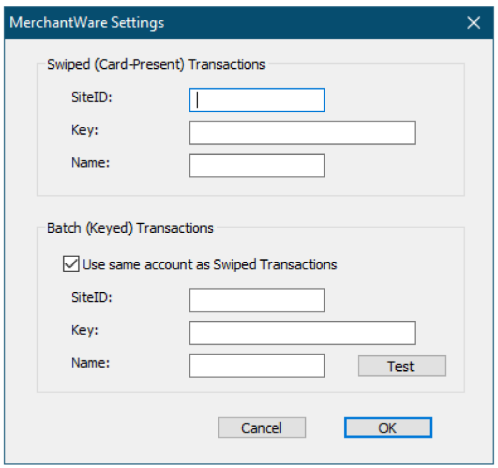
Click this button to automatically send an email to IP Pay requesting that they allow submissions from your computer.

User alternate Relay URL

Check this box to submit charges through an alternate internet relay site. This is only required if your internet provider changes your IP address.

Integrated – Cayan (MerchantWare 4.5)

Select this method if you will be interfacing directly with the **Global Payments** (formerly "TSys/Cayan" and "Merchant Warehouse") gateway.



Obtain your **SiteID**, **Key** and **Name** from Global Payments.

If you are planning to utilize a separate account for batch transactions, then uncheck the **Use Same Account as Swiped Transactions** under Batch (Keyed) Transactions and enter that account info there.

Integrated – Bambora

Select this method if you will be interfacing directly with the **Worldline** (formerly "Bambora") internet gateway.

See Bambora (Worldline) 152 below for details.

CC-Integrated--Authorize.net

Select this method if you will be interfacing directly with the **Authorize.net** gateway.

Setup your Authorize.net Account

When you setup your account with Authorize.net make sure that it is setup to handle card-not-present transactions.

To confirm that the Authorize.net account is setup correctly:

- Login to your Authorize.net account.
- Under Account (on the left side) click Merchant Profile.
- Under Business Information confirm that Product Type is set to Card Not Present.
- If your Authorize.net account is not setup as Card Not Present then you will need to contact Authorize.net to setup a Card Not Present account.

Now you just need to change some settings under your Authorize.net account:

- Under **Account** (on the left side) click **Settings**.
- Under **Transaction Format Settings** click **Direct Response**.
- Set **Delimited Response** to **Yes**.
- Set **Default Field Separator** to **Comma**.
- Leave **Field Encapsulation Character** blank.
- Click **Submit**.

Copy Authorize.net Settings into Gym Assistant

Now you will need to get your Authorize.net login information to enter into Gym Assistant:

- Under **Settings/Security Settings** click **API Login ID and Transaction Key**.

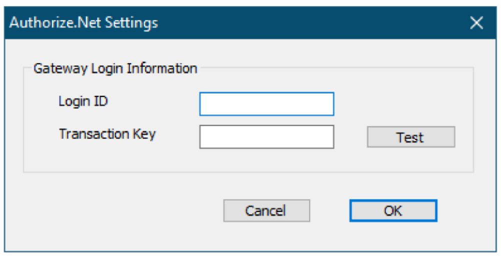
- Copy the **API Login ID** into Gym Assist (see below) or paste into a NotePad or Word document.
- Under **Create New Transaction Key** enter the answer to your security question and click **Submit**. A new Transaction Key will be displayed. Copy this **Transaction Key** into Gym Assist (see below) or paste into a NotePad or Word document.

You are now ready to setup Gym Assistant for processing with Authorize.net:

Select **Credit Card Processing** from the **Settings** menu.

Set the **Processing Method** to **Authorize.net**.

Click **Settings**.



Enter the **Login ID** and **Transaction Key** that you obtained from Authorize.net.

Click **Test** to test these settings with the Authorize.net gateway.

If the test is successful then you are ready to begin charging cards through Gym Assistant. If there are problems please see **Troubleshooting** below.

Troubleshooting

Error 92 - The gateway no longer supports the requested method of integration

If you get this error then you need to properly set the Direct Response setting on the Authorize.net website. See above for directions.

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.

The software will not ask you to enter credit card info for members.

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

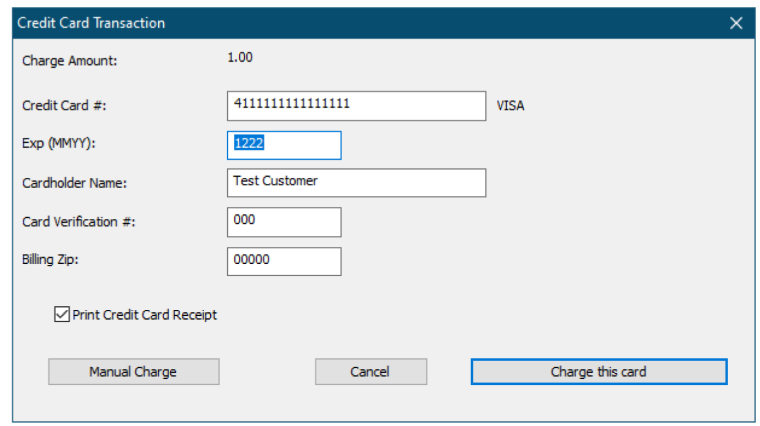
If you are using one of the integrated processing methods, then we recommend that you run a test transaction using a real credit card to confirm that the system is working properly.

Select **Special Features** from the **Utilities** menu.

Type in or select **Run CC Charge** from the list and click **OK**.

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

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



Enter the security code from your credit card.

Click the **OK** to submit the charge.

After running the charge you may want to void the transaction with your processor.

Billing: Credit Cards 6

Processing Credit Card Members

Here are the steps you will do to process your credit member members:

1. **Select members to charge**
   Create a list of members due on or before the billing date.
2. **Clean up invalid ACH info**
   Any members with invalid bank info can be fixed in this step.
3. **Process the payments**
   Charge member credit cards. Payments are record in the member record automatically.

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

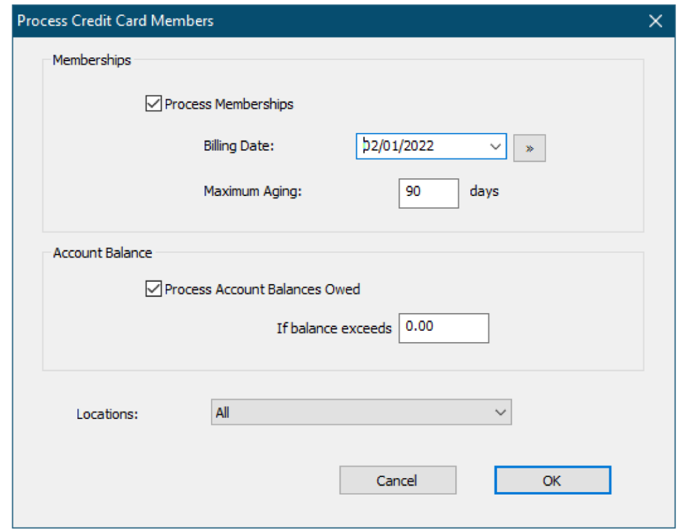
- Credit card charges are processed in real-time -- once a charge is approved the funds are transferred automatically.
- An ACH transaction; however, is a request to transfer funds -- exactly like depositing a check, you won't know for 3-4 business days if the transfer is successful or not.

Selecting Members to Charge 142

Billing: Credit Cards 6

Selecting Members to Charge

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



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.

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.

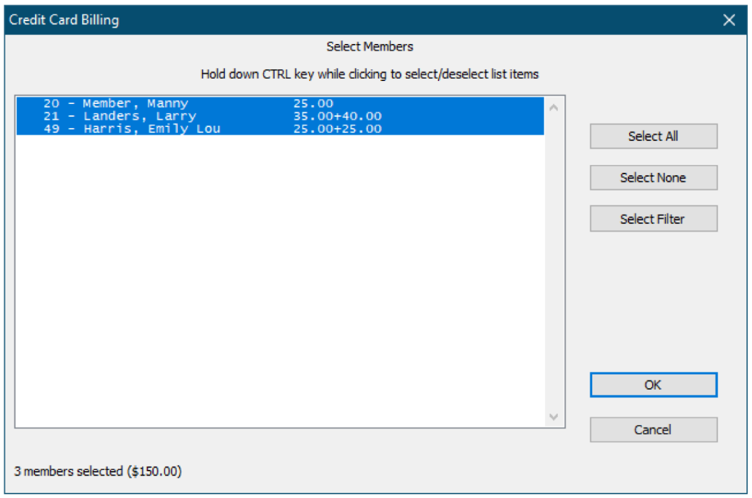
If you specify a Maximum Aging of 90 days then members who are due more than 90 days before the Billing Date will not be included in the list.

Process Account Balances Owed 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.

Click **OK** to continue.

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.

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

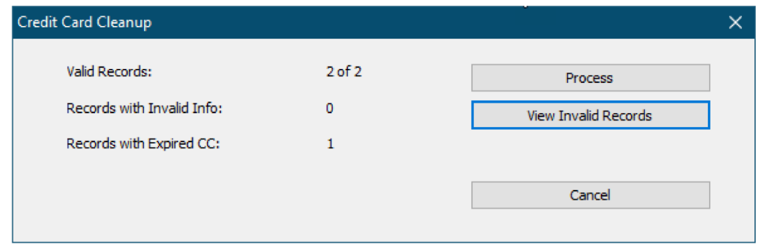
Note: The total number of members in the list and total amount billed appears at the bottom of the window.

Click the **OK** to continue.

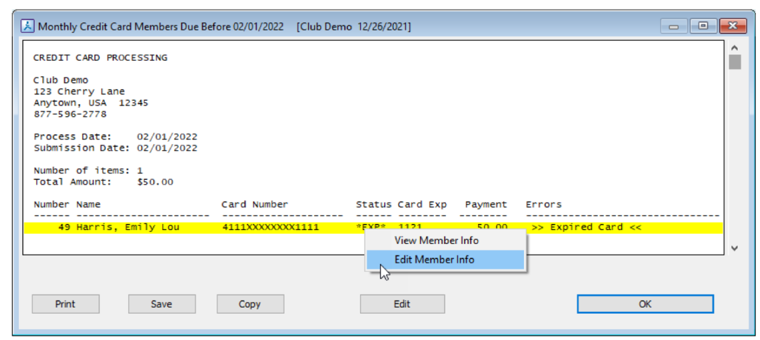
Cleaning Up Invalid Credit Card Info 144

Cleaning Up Invalid Credit Card Info

The Credit Card Cleanup window shows the number of members with invalid or expired credit cards.



Click **View Invalid Records** to see the list of invalid records and make any corrections.



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

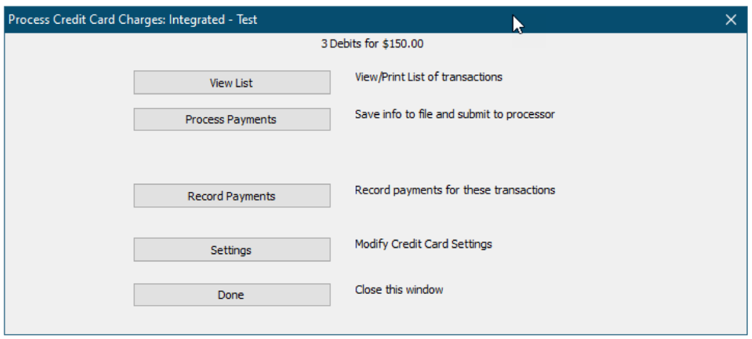
After reviewing and correcting any invalid card info, click **OK** to return to the Credit Card Cleanup window.

Click **Process** 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 145

Processing the Payments

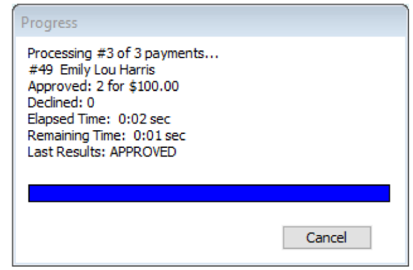


View List

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

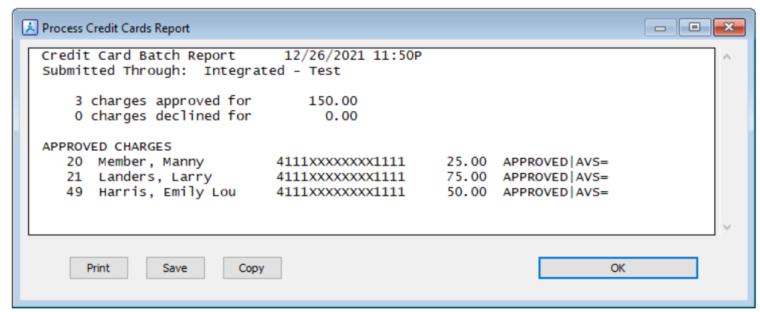
Gym Assistant will now automatically process each charge in the batch.



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

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

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



This batch report is archived for later retrieval.

(See View Submitted CC Batches 147)

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.

Note: This step will NOT be used if you are using one of the integrated processing methods.

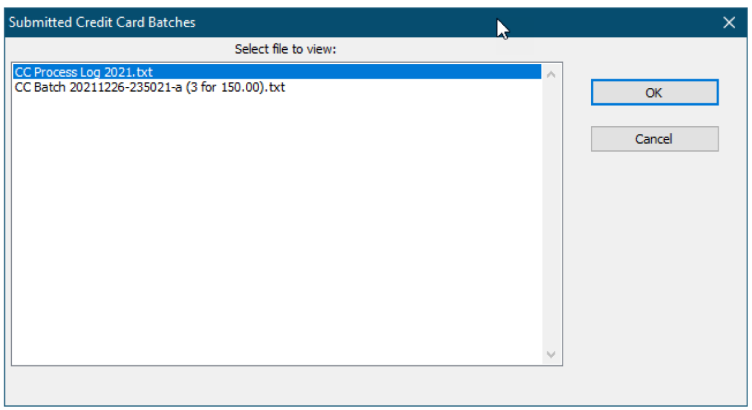
Settings

Allows you to change the currently selected processing method and configuration.

View Submitted CC Batches

Gym Assistant archives every batch report that is generating when processing CC charges.

Select **View Submitted CC Batches** from the **Billing** menu.



The first item in the list is the CC Process Log for the year, which will show details for all charges made. This report may come in handy when trying to track down a problematic charge.

Each batch that is submitted will be listed with time/date, the number of successful charges and the total successfully charged.

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.

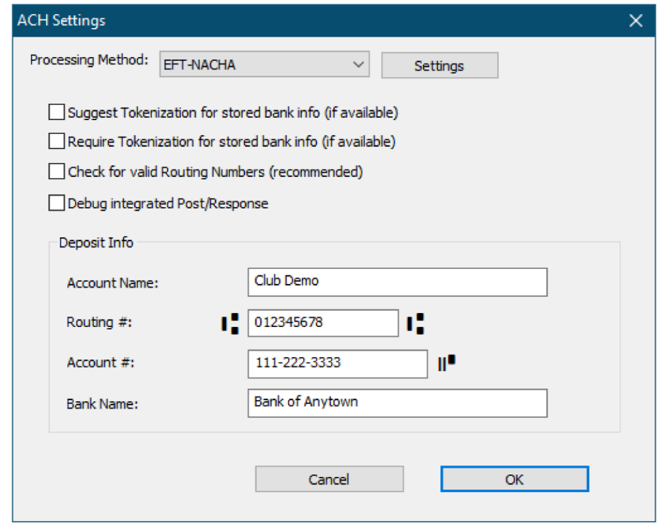
External Processing

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

Select ACH Processing from the Settings menu.



Processing Method

Select the Processing Method that you will be using:

- IP Pay
- Bambora (Worldline)
- Check Assist (also known as "Quick Pay")
- EFT-NACHA
- EFT-Canada
- EFT External

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).

Require Tokenization

Check this box 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 and conform to PCI guidelines. (See "Tokenizing Card Information for Maximum Security" elsewhere in this document for more information about tokenizing credit card info.)

Check for valid Routing Numbers

Check this box if you want Gym Assistant to verify that a member's routing (ABA) number is valid.

Debug integrated Post/Response

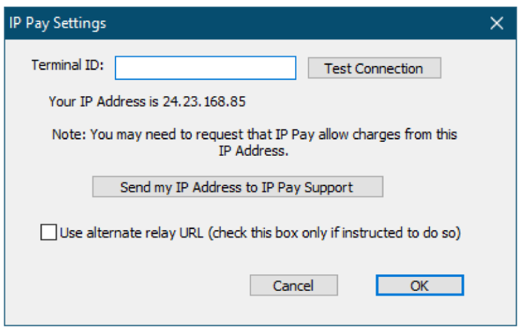
Check this box only if requested by Gym Assistant Support.

Deposit Info

Enter the information for your business bank account (the account into which funds will be deposited), only if required.

IP Pay

IP Pay is a Credit Card and ACH processor that provides an online gateway and online reporting.



Terminal ID

You should obtain your Terminal ID from IP Pay.

Click Test Connection to test that your Terminal ID is correct.

Note: IP Pay must explicitly add your computer IP address to their system before you can submit transactions.

Send my IP Address to IP Pay Support

Click this button to automatically send an email to IP Pay requesting that they allow submissions from your computer.

User alternate Relay URL

Check this box to submit charges through an alternate internet relay site. This is only required if your internet provider changes your IP address.

Bambora (Worldline)

Bambora Account Setup

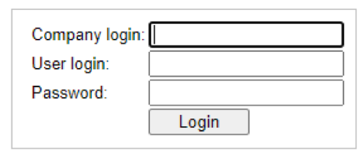
When signing up for a new Bambora account it is very important to make sure that Bambora sets up your account correctly.

You will need **Payment Profile Configuration** turned **ON**.

Bambora Credentials

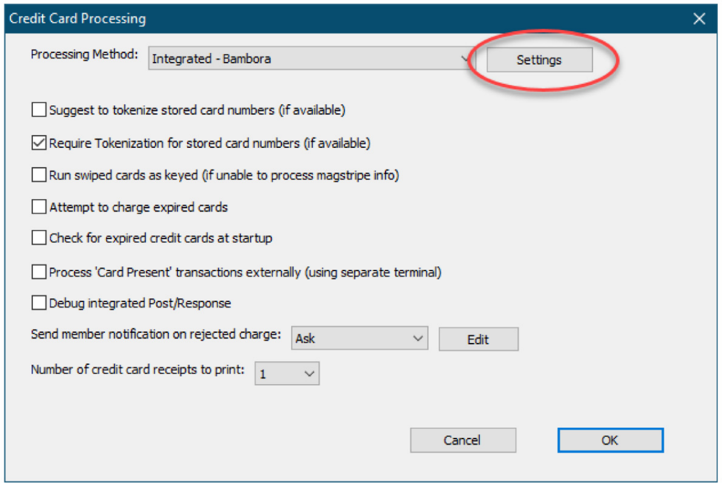
Login to the Bambora website at www.bambora.com.

You will need the login credentials given to you by Bambora.



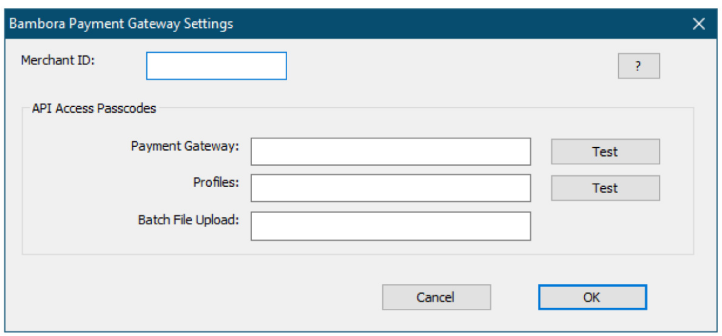
Gym Assistant Setup

In Gym Assistant select **Credit Card Settings** from the **Billing** menu.



Select the "**Integrated – Bambora**" for **Processing Method**.

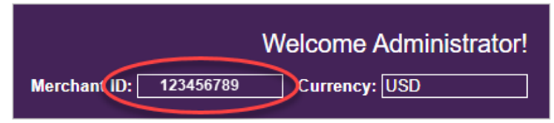
Click the **Settings** button.



You will find the necessary credentials info on the Bambora web page.

Merchant ID

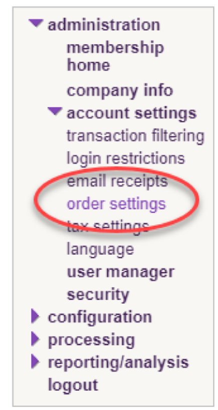
You will find your **Merchant ID** in the **upper-right corner**.



Payment Gateway

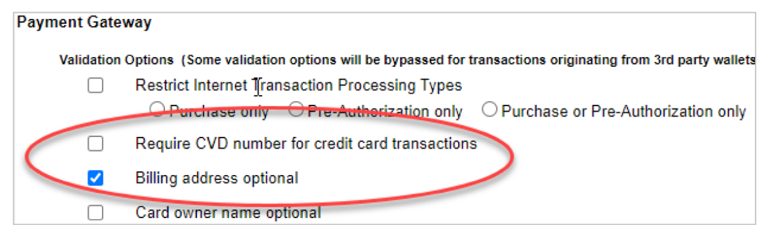
On the left side menu:

- Click **Administration**.
- Click **Account Settings**.
- Click **Order Settings**.



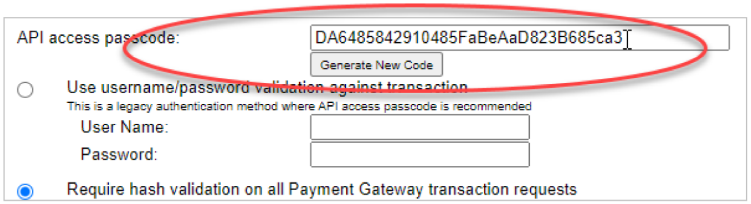
Scroll down to **Payment Gateway**.

- Uncheck "Require CVD number for credit card transactions.
- Check "Billing address optional".



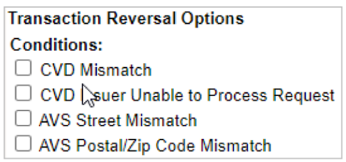
Under **Security/Authentication**:

- If there is no value listed for “API access passcode” then click **Generate New Code**.
- Copy the contents of the “API access passcode”.



Scroll down to “**Transaction Reversal Options Conditions**”.

Uncheck all four boxes.



*Scroll to the bottom of the page and click **Update**.*

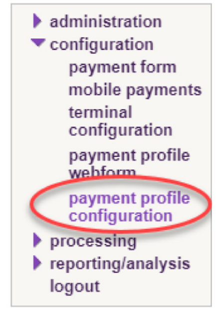
In Gym Assistant, paste the previously copied text into the **Payment Gateway** field.

Click the Test button next to the Payment Gateway field.

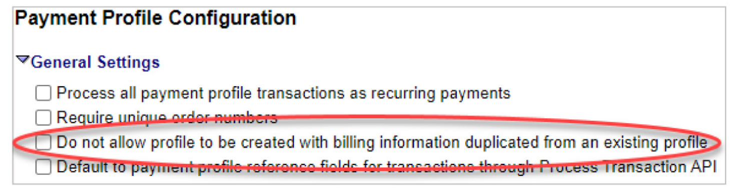
Profiles

On the left side menu:

- Click **Configuration**.
- Click **Payment Profile Configuration**.

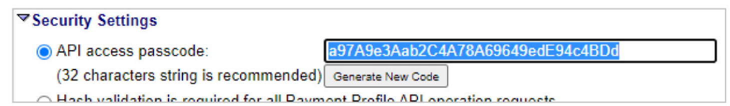


Under **General Settings**, uncheck the box “**Do not allow profile to be created with billing information duplicated from an existing profile**”.

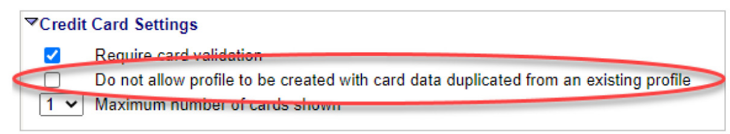


Under **Security Settings**:

- If there is no value listed for “API access passcode” then click **Generate New Code**.
- Copy the contents of the “API access passcode” field.



Under **General Settings**, uncheck the box “**Do not allow profile to be created with billing information duplicated from an existing profile**”.



Scroll to the bottom of the page and click **Update**.

In Gym Assistant, paste the previously copied text into the **Profiles** field.

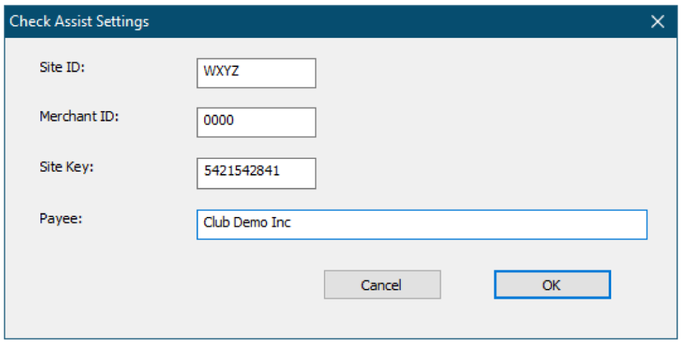
Click the **Test** button next to the **Profiles** field.

Click the **OK** button to save the credentials into Gym Assistant.

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.

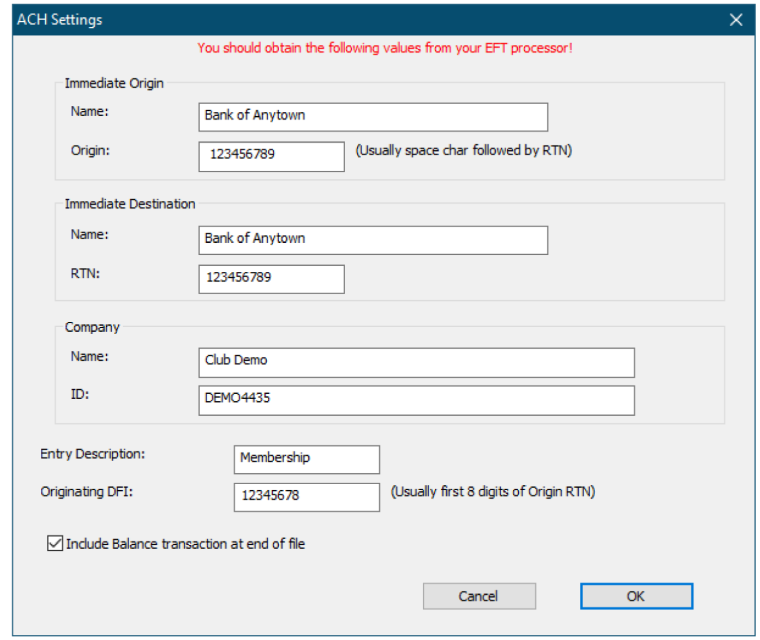


You should obtain the following information from Check Assist:

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

NACHA

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

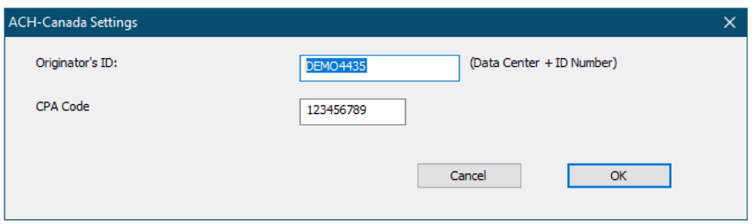
First 8 digits of Processor Routing # or other # designated by your processor

Include Balance Transaction at end of file

Usually checked, but your bank will determine whether this is needed

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.

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

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

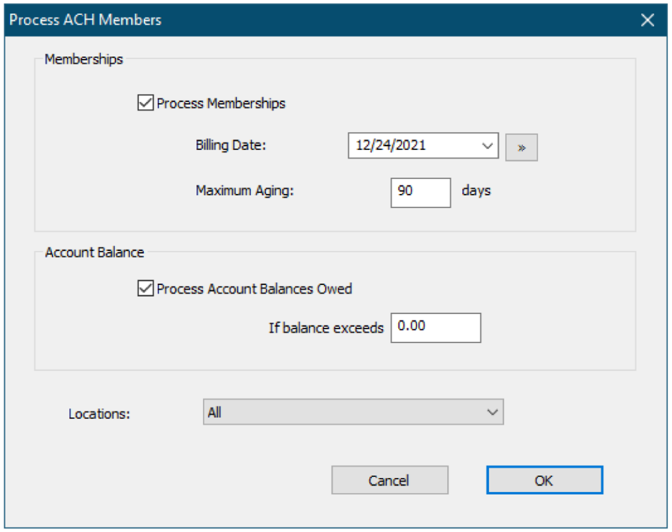
1. **Select members to charge**
   Create a list of members due on or before the billing date.
2. **Clean up invalid ACH info**
   Any members with invalid bank info can be fixed.
3. **Process the payments**
   Charge member credit cards.
4. **Record payments**
   All payments are recorded in Gym Assistant.
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.

Select Process Date

Select **Process ACH Members** from the **Billing** menu.



Process Memberships

Check this box to process members who have a payment due.

Billing Date

All ACH members who have a payment due on or before this date will be processed.

- Select a billing date from the drop down menu.
- Type in a billing date.
- Click the calendar button to specify a billing date.

Maximum Aging

This allows you to filter out members who are delinquent by more than a specified time.

Any member whose due date is more than this many days before the Billing Date will not be processed.

For example, you might not want to bill members who are more than 90 days 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.

Process Account Balances Owed

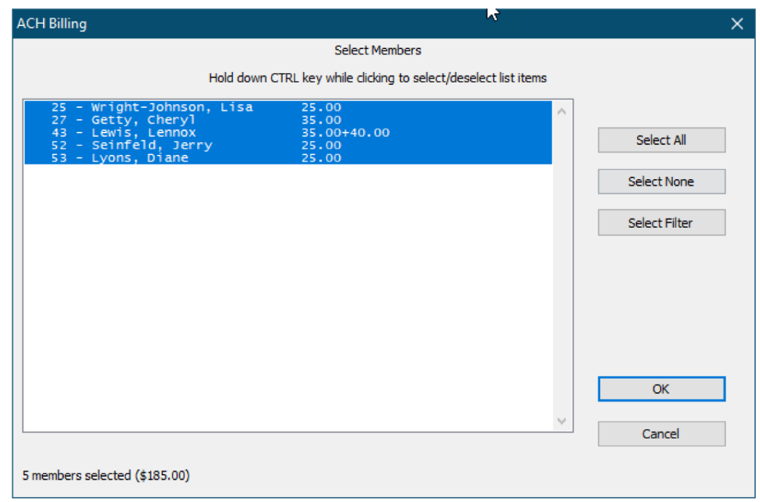
Check this box to include any members who currently have a balance owed more than the specified amount.

Click **Continue** to proceed to the next step. (Select From the List) 162

Select From the List

Selecting From the List

The ACH 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.

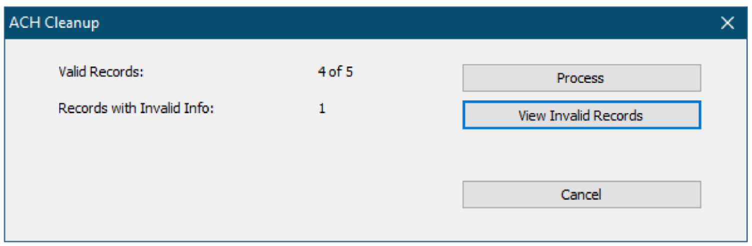
Hold down the CTRL key while clicking on a member in the list to select or unselect that member.

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

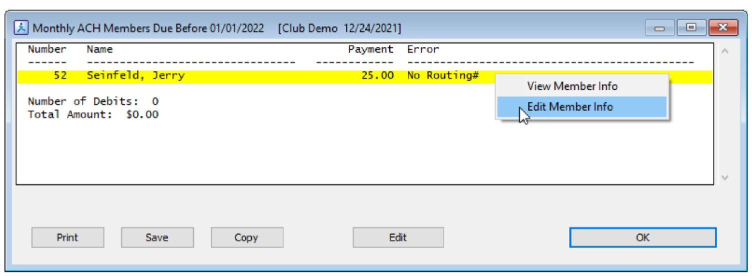
Click **Continue** to proceed to the next step. (Cleaning Up Invalid Accounts) 163

Cleaning Up Invalid Accounts

The **ACH Cleanup** window shows the number of members with invalid account information.



Click **View Invalid Records** to see the list of invalid records and make any corrections.



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

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

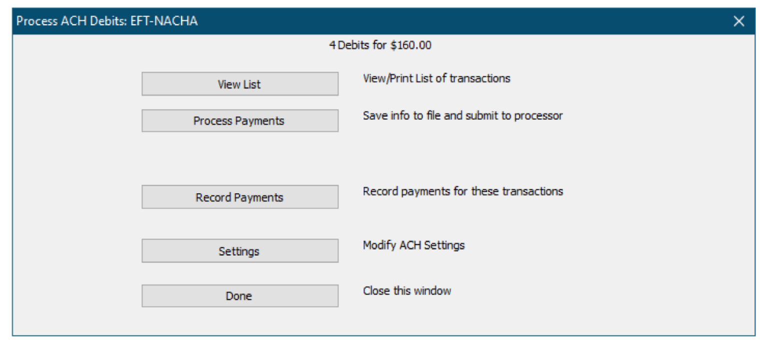
Click **Continue** to proceed to the next step.

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

In the ACH Cleanup window click **Process** to proceed to the next step. (Cleaning Up Invalid Accounts) 163

Processing Payments

The **Process ACH Debits** window title shows the currently selected processing method.



View List

Displays a list of the charges that will be processed. You might want to print out the list of charges to reconcile with the report you will receive later from your processor.

Process Payments

Process the charges using the currently processing method.

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

Record Payments

Record all of the payments for this batch. This will record the payments in Gym Assistant, but it does ***not*** submit the debits to your processor.

Note: 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

Change the currently selected processing method and configuration.

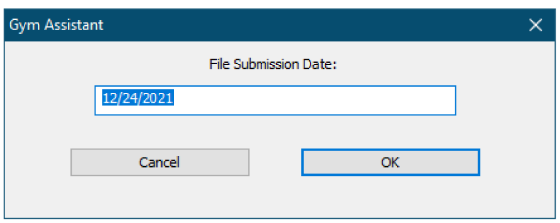
Done

Finish Processing

NACHA Processing

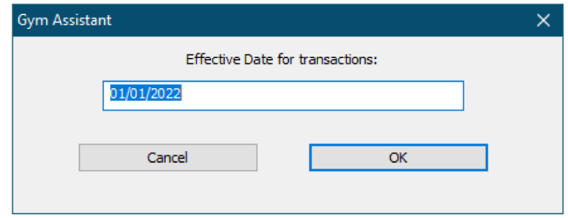
Gym Assistant will generate a batch file that you can send to your processor (usually by uploading to a secure website).

Specify a **File Submission Date**.



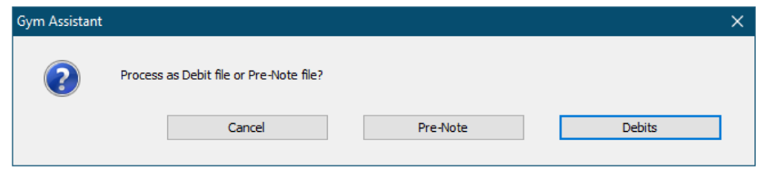
This should the date the file is created.

Specify a **Transaction Effective Date**.



This is the date on which the debits should occur.

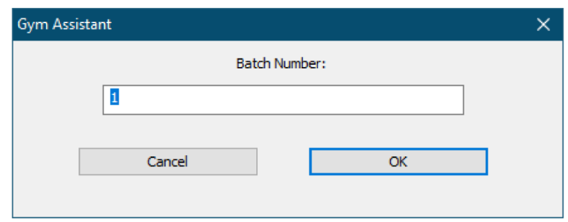
You will be asked "**Process as Debit File or Pre-Note file?**"



Click **Pre-Note** to send a test file (with all zero amounts).

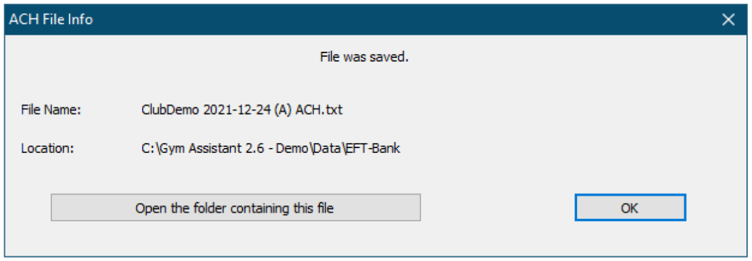
Click **Debits** to send a live file with real amounts.

Enter a **Batch Number**.



Either accept the default, or enter another value if specified by your processor.

The NACHA file will be saved in the EFT-Bank folder.



Click **Open the folder containing this file** if you want to view the file (for example, if you will be copying the file to another application).

Note that the NACHA format is very complex and not easy to read. Do not edit this file, as you may render it unusable by your bank.

Click **OK** to finish.

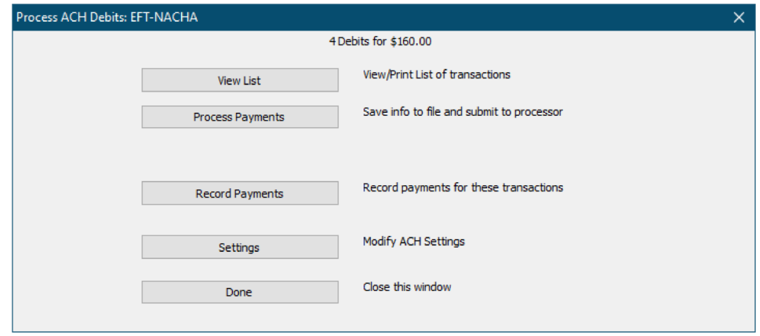
You must **Record Payments** to mark the members as paid in Gym Assistant.

There are two strategies for recording ACH payments:

- 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.



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

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

There are two strategies for recording ACH payments:

- 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.

Enter topic text here.

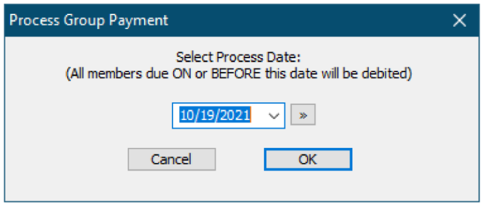
Process Group Payment

If necessary, you can record a group of payments (or a batch) in Gym Assistant without actually running the charges from the software.

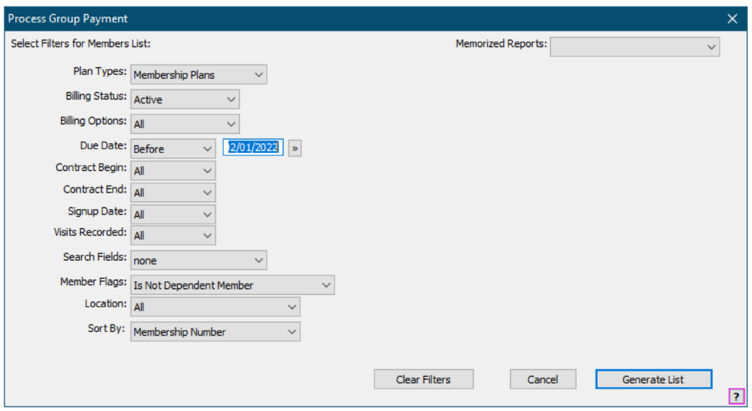
For example, you may have a company that pays membership dues for its employees.

You can send the company an invoice for all of the members and record all of the member payments at one time.

Select **Process Group Payment** from the **Billing** Menu.

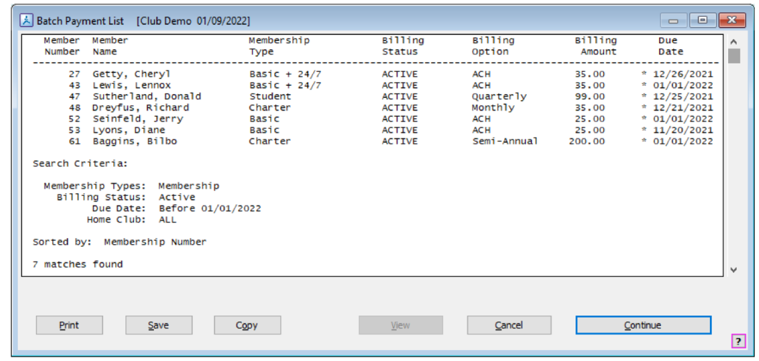


Select a date for which the payments will be processed. Only member due on or before this date will be included in the batch.

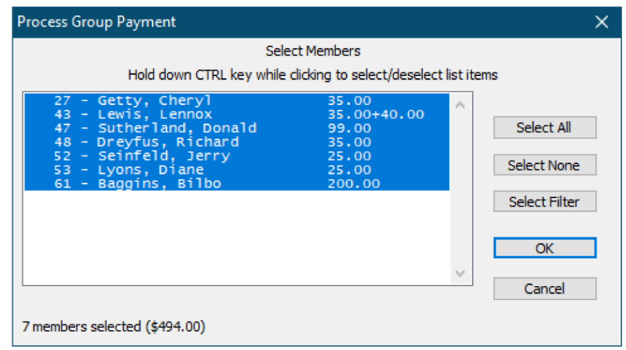


Select any other parameters to further filter the list. (See Selecting Members for a Report 178)

Click **Generate List** to continue.



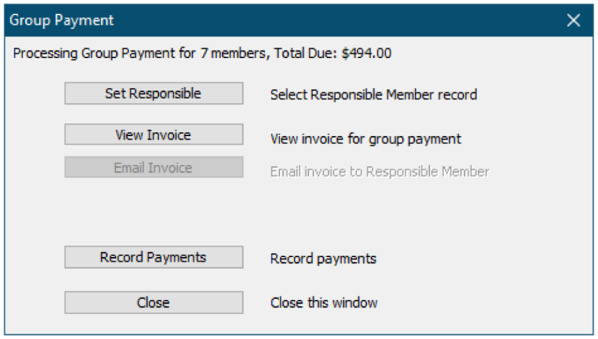
Click **Continue**.



Select or unselect members from the list as needed.

- Hold down the **CTRL** while **clicking** on an individual member in the list to toggle that member's selection.
- Click **Select All** to select all in the list.
- Click **Select None** to unselect all members.
- Click **Select Filter** to apply another filter to the current list. (This allows you to more finely filter the list.)

Click **OK** to continue.

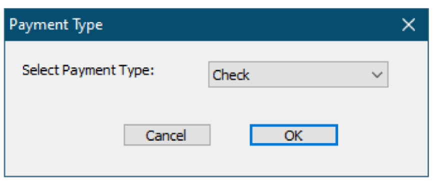


Click **Set Responsible** to select a member record to receive the invoice (e.g. the sponsoring company).

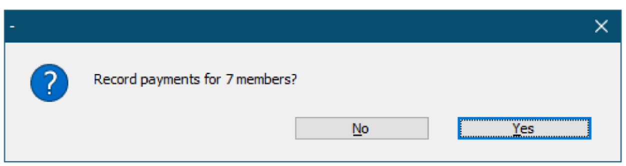
Click **View Invoice** to view (or print) the invoice for the group payment. (See Group Payment Invoice 172)

Click **Email Invoice** to send the invoice to the responsible member record.

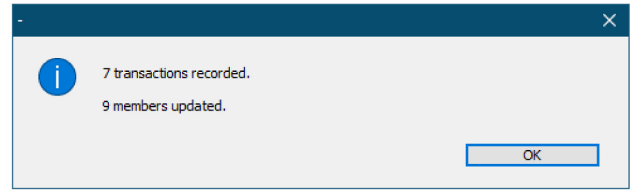
Click **Record Payments** to continue.



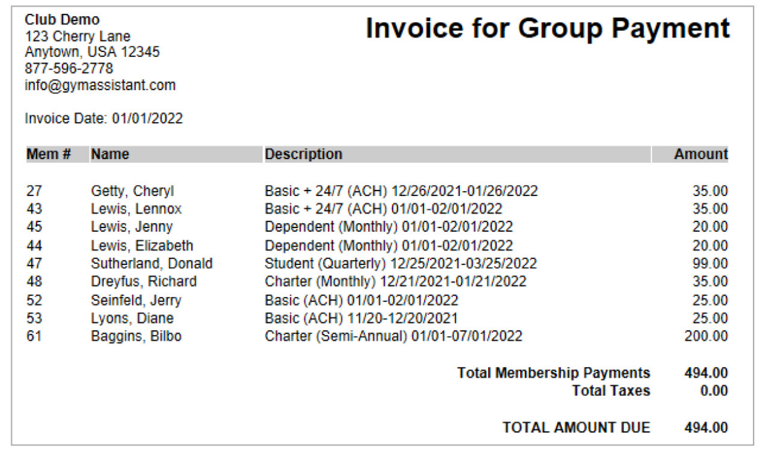
Select the **Payment Type** for the payment, then click **OK**.



Click **Yes** to continue.



Group Payment Invoice



Club Demo
123 Cherry Lane
Anytown, USA 12345
877-596-2778
info@gymassistant.com

Invoice for Group Payment

Invoice Date: 01/01/2022

Mem #	Name	Description	Amount
27	Getty, Cheryl	Basic + 24/7 (ACH) 12/26/2021-01/26/2022	35.00
43	Lewis, Lennox	Basic + 24/7 (ACH) 01/01-02/01/2022	35.00
45	Lewis, Jenny	Dependent (Monthly) 01/01-02/01/2022	20.00
44	Lewis, Elizabeth	Dependent (Monthly) 01/01-02/01/2022	20.00
47	Sutherland, Donald	Student (Quarterly) 12/25/2021-03/25/2022	99.00
48	Dreyfus, Richard	Charter (Monthly) 12/21/2021-01/21/2022	35.00
52	Seinfeld, Jerry	Basic (ACH) 01/01-02/01/2022	25.00
53	Lyons, Diane	Basic (ACH) 11/20-12/20/2021	25.00
61	Baggins, Bilbo	Charter (Semi-Annual) 01/01-07/01/2022	200.00
		Total Membership Payments	**494.00**
		Total Taxes	**0.00**
		TOTAL AMOUNT DUE	**494.00**

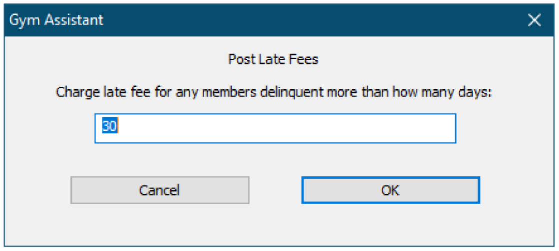
<< Back to Process Group Payment 168

Post Late Fees

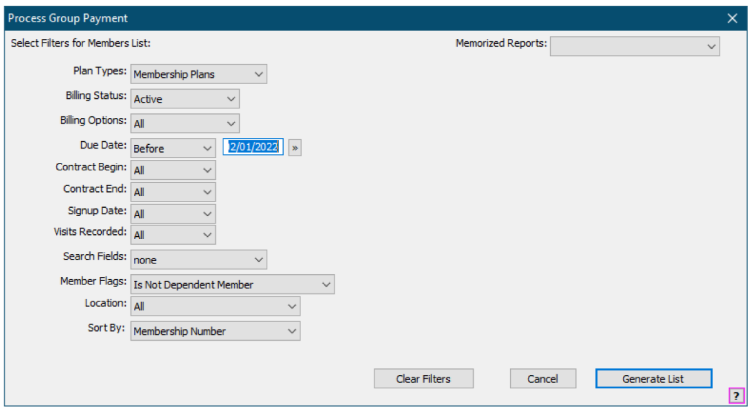
You can post late fees to member with past due accounts.

The fees are added to each member's account balance. Any account balance due is automatically added to the member's next billing cycle.

Select **Post Late Fees** from the **Billing** menu.



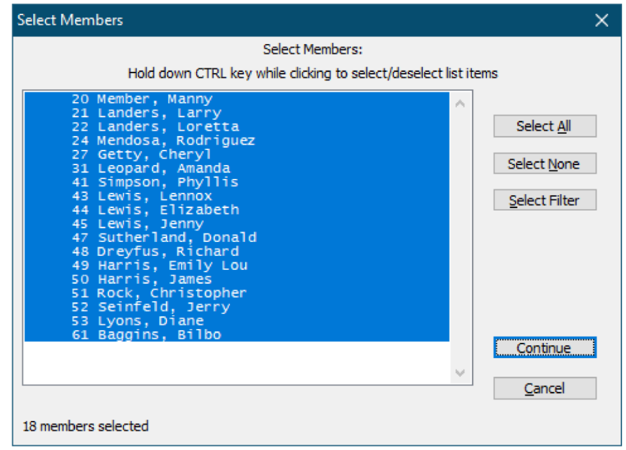
Specify the number of days past-due that will trigger a late fee.



Select any other parameters to further filter the list. (See Selecting Members for a Report 178)

Click **Generate List** to continue.

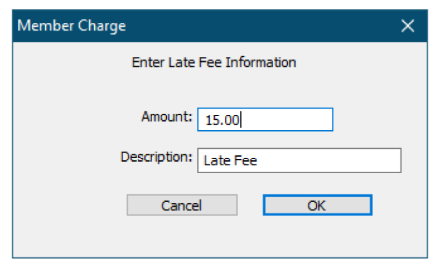
Click **Continue**.



Select or unselect members from the list as needed.

- Hold down the **CTRL** while **clicking** on an individual member in the list to toggle that member's selection.
- Click **Select All** to select all in the list.
- Click **Select None** to unselect all members.
- Click **Select Filter** to apply another filter to the current list. (This allows you to more finely filter the list.)

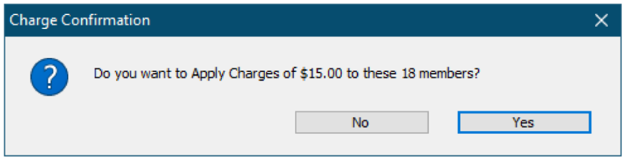
Click **OK** to continue.



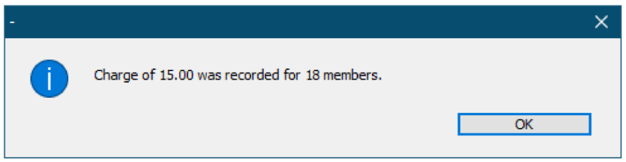
Enter an **Amount** and **Description** for the late fee.

Billing: Other

8



Click **Yes** to continue.

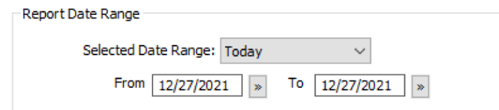


Reports

9

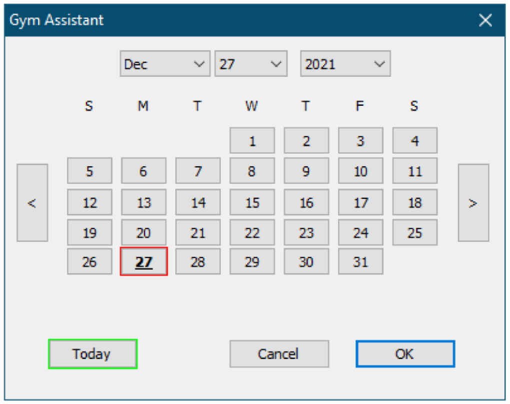
Selecting a Report Date Range

When selecting a date range in most reports you have a number of methods to use:



- Select a date range from the list (**All**, **Today**, **Yesterday**, **Last Month**, **This Month**, **This Year**, etc.).
- Type in a beginning and ending date.
  - You don't need to add leading zeros
  - You can enter year as 2-digits, e.g. "21" instead of "2021".
  - You can leave out the year if the date is in the current year, e.g. "3/15" is understood as 3/15/2022.
  - For example, all of the following can be entered for the data March 15, 2022:
    - 03/15/2022
    - 3/15/2022
    - 3/15/22
- Click the calendar button to bring up the Calendar Popup.

Using the Calendar Popup



Select **Month**, **Day** or **Year** from list buttons at the top.

Go to **Prev** / **Next** month with the **<** and **>** buttons on the left / right.

Click on a day to select it.

Click **Today** button to select today.

Click **OK** when finished.

Member Reports

[Members Detail Report](177)

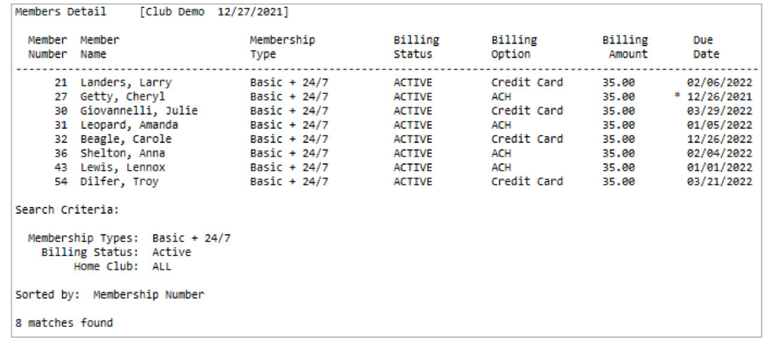
[Membership Summary Report](187)

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.

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

Sample member list


Members Detail [Club Demo 12/27/2021]

Member Number	Member Name	Membership Type	Billing Status	Billing Option	Billing Amount	Due Date
21	Landers, Larry	Basic + 24/7	ACTIVE	Credit Card	35.00	02/06/2022
27	Getty, Cheryl	Basic + 24/7	ACTIVE	ACH	35.00	* 12/26/2021
30	Giovannelli, Julie	Basic + 24/7	ACTIVE	Credit Card	35.00	03/29/2022
31	Leopard, Amanda	Basic + 24/7	ACTIVE	ACH	35.00	01/05/2022
32	Beagle, Carole	Basic + 24/7	ACTIVE	Credit Card	35.00	12/26/2022
36	Shelton, Anna	Basic + 24/7	ACTIVE	ACH	35.00	02/04/2022
43	Lewis, Lennox	Basic + 24/7	ACTIVE	ACH	35.00	01/01/2022
54	Dilfer, Troy	Basic + 24/7	ACTIVE	Credit Card	35.00	03/21/2022

Search Criteria:

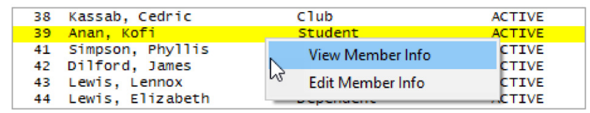
Membership Types: Basic + 24/7
Billing Status: Active
Home Club: ALL

Sorted by: Membership Number

8 matches found

In any member list

- Double-click on any row to view the member record.
- Right-click on any row to bring up a context menu showing you options.



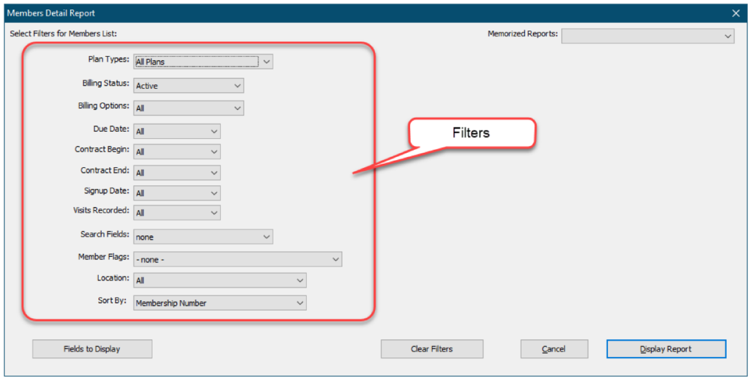
[Selecting Members for a Report](178)

[Selecting Columns for a Member Report](186)

[Memorized Reports](186)

Selecting Members for a Report

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 179

Billing Status 180

Billing Options 181

Due Date 182

Contract Begin / Contract End / Signup Date 182

Visits Recorded 183

Search Fields 183

Member Flags 183

Sort By 185

Fields to Display 186

Plan Types

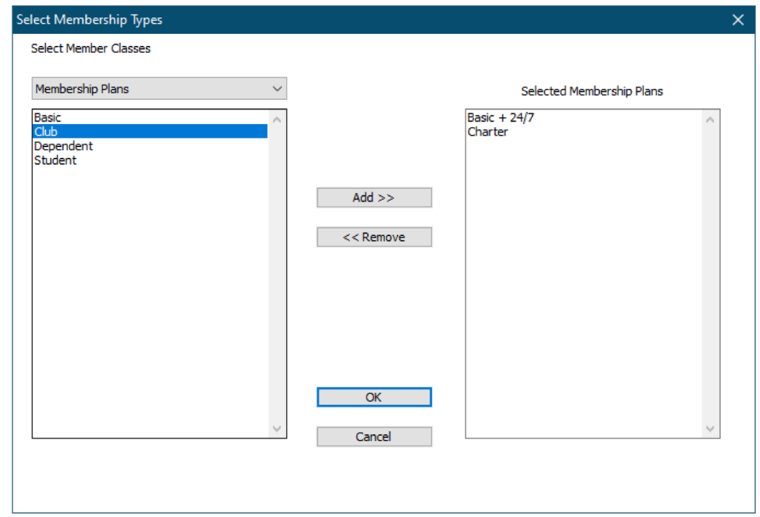
Plan Types

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.

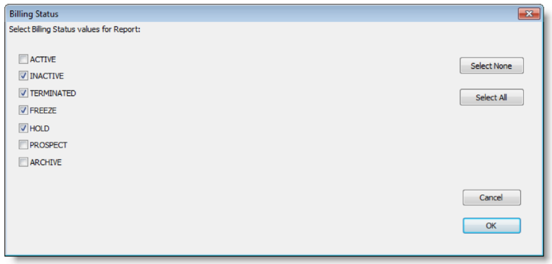
Billing Status

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:



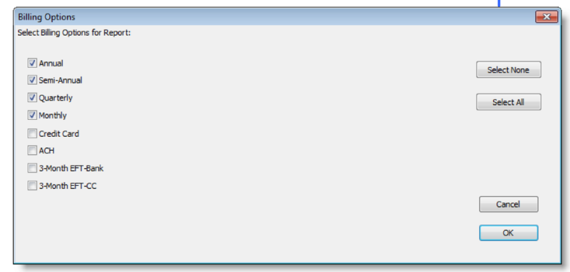
Billing Options

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:



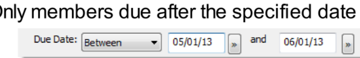
Due Date

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.



Contract Begin / Contract End / Signup Date

Contract Begin / Contract End / Signup Date

Choose a filter for Contract Begin/Contract End/Signup

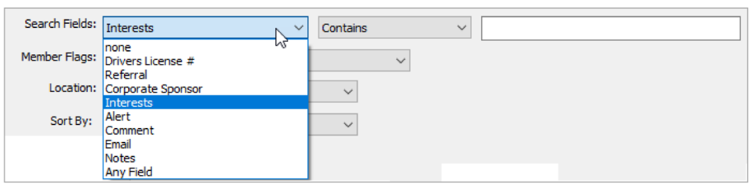
- **All**: this date will not be used to filter the list.
- **Before**: Only members with this date before the specified date will be displayed.
- **Between**: Only members with this date between the specified dates will be displayed.
- **After**: Only members with this date after the specified date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

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.



Select a field to search (or "Any Field").

Select "Not Empty, "Contains" or "Equals"

Enter text to search for.

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….

Available Fields:

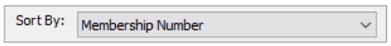
- Has Alert
- Has Balance
- Has Barcode

- Has Comment
- Has Custom Billing Amount
- Has Dependent Members
- Has Email
- Has Freeze Date
- Has Insurance ID
- Has Measurements
- Has Mobile Phone
- Has Monthly Add-On
- Has No Alert
- Has No Barcode
- Has No Comment
- Has No Email
- Has No Measurements
- Has No Mobile Phone
- Has No Notes
- Has No Photo
- Has Notes
- Has Photo
- Is Dependent Member
- Is Not Dependent Member
- Measurement is Due
- Measurement Not Due
- Sex is Female
- Sex is Male
- Terminate Billing - Never
- Terminate Billing at Contract
- Terminate Billing at Due Date
- Vaccine is Not Valid
- Vaccine is Valid
- Vaccine Will Expire Soon

- Waiver is Not Valid
- Waiver is Valid
- Waiver Will Expire Soon

Sort By

This field determines the sorting for the list.

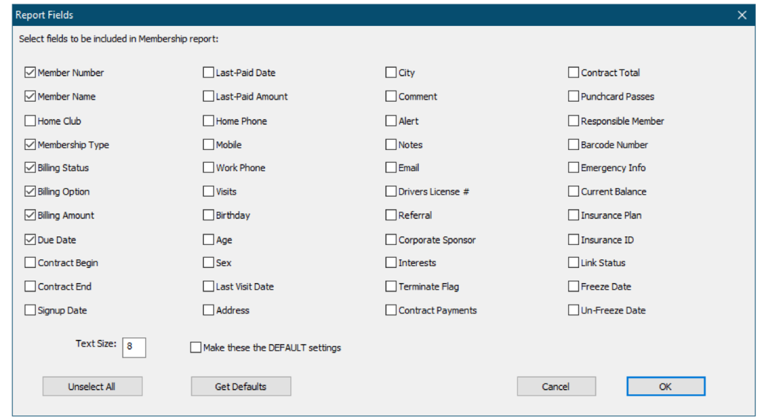


You can sort on the following fields:

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

Selecting Columns for a Member 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

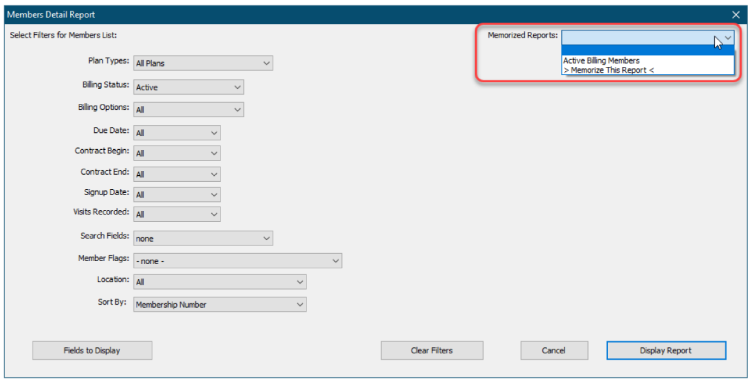
Gym Assistant can memorize a report setup for later re-use. For example, you might want to generate a list of all members whose contracts will be expiring in the next month.

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

Memorizing a Report

In the Members Detail Report settings window, select **"Memorize This Report"** from the **Memorized Reports** menu.

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



Loading a Memorized Report

Select a report from the **Reports > Memorized Reports** menu.

or

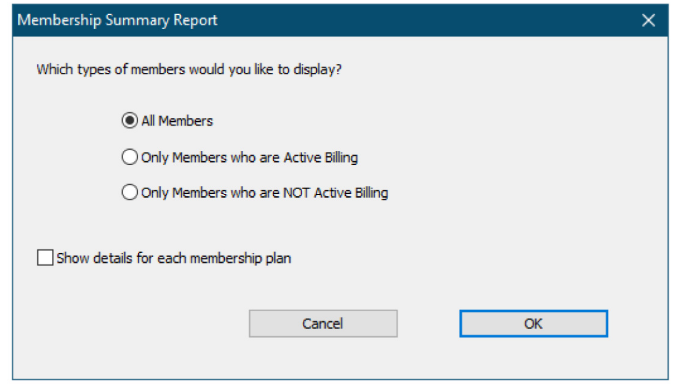
In the **Members Detail Report** settings window select from the **Memorized Reports** menu.

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

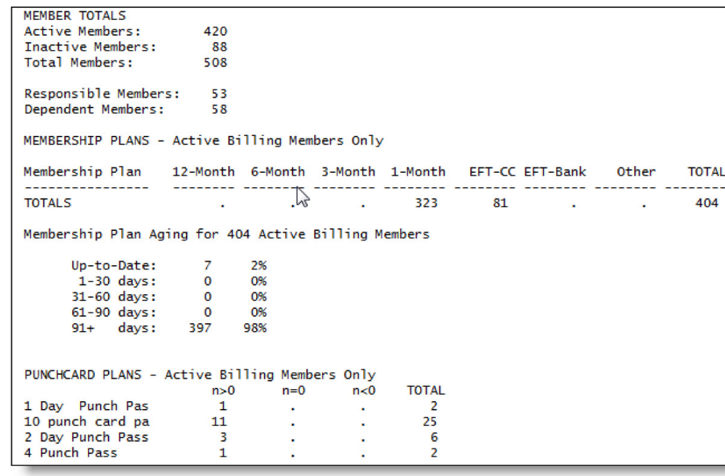
Membership Summary Report

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.



Membership Summary Overview



```
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 Plan Details

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

Financial Reports

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

Revenue Projection Report 189

Revenue Performance Report 190

Sales by Membership Type 191

Revenue Projection Report

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

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

Select **Revenue Projection** from the Reports menu.

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

Month	Projected Payments	Projected 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

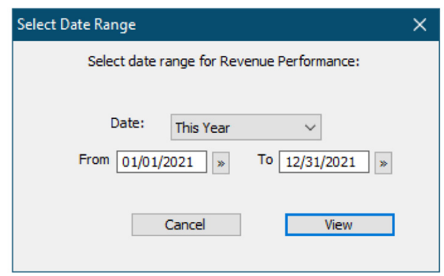
Total Projected Payments: 31319
Total Projected Revenue: $458,204.

Revenue Performance Report

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

Select **Revenue Performance** from the **Reports** menu.

Specify the date range for the report.



- 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.

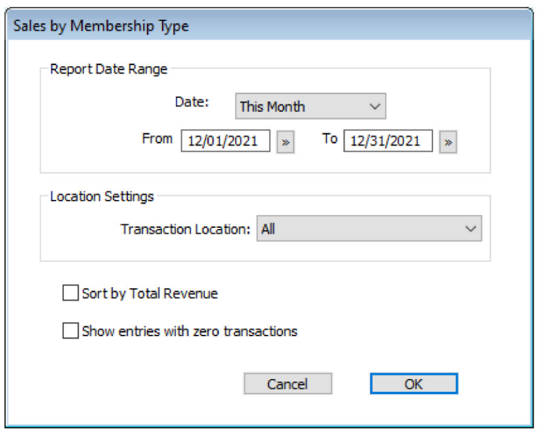
Club Demo
123 Cherry Ave 123 Cherry Ave
Alameda, CA 94222

Month	Member Adds		Payments		Reversals		Voids	Inact	Del	TOTALS
Jan 01/10	35	1,796	160	6,197	0	0	4	0	15	7,994
Feb 02/10	23	1,377	137	5,432	0	0	7	0	12	6,809
Mar 03/10	50	3,297	229	9,585	0	0	3	0	16	12,882
Apr 04/10	40	2,485	181	7,011	0	0	0	1	19	9,496
May 05/10	24	1,736	206	8,010	0	0	2	6	15	9,747
Jun 06/10	23	1,223	205	8,232	0	0	1	1	19	9,456
Jul 07/10	19	1,404	199	8,050	0	0	2	0	26	9,454
Aug 08/10	20	1,285	215	8,623	0	0	1	0	26	9,909
Sep 09/10	29	2,085	207	8,487	0	0	1	0	9	10,572
Oct 10/10	26	1,760	250	10,451	0	0	2	0	26	12,211
Nov 11/10	46	2,954	235	9,240	0	0	2	0	15	12,194
Dec 12/10	23	1,478	195	8,259	0	0	2	0	13	9,737
TOTALS:	358	22,884	2419	97,582	0	0	27	8	211	120,467

Sales by Membership Type

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

Select Sales by Membership Type from the Reports menu.



Select a date range for the report.

SALES BY MEMBERSHIP PLAN for 01/01/2010 - 12/31/2010

*** PLAN TYPE: Membership ***

Membership Type	Members Added		Payments Made		Total
Individual	219	16,236.47	1037	44,588.52	60,824.99
Couple	25	2,218.48	179	12,073.64	14,292.12
EFT individual	5	307.27	302	11,880.07	12,187.34
EFT Couple	2	205.29	151	10,269.80	10,475.09
Senior	20	1,595.43	138	5,496.84	7,092.27
1 Month Membership	0	0.00	94	4,885.00	4,885.00
Student	9	597.39	37	1,530.00	2,127.39
Family	4	432.17	16	1,365.00	1,797.17
Individual - No Invoice	7	350.00	31	1,260.00	1,610.00
Senior - No Invoice	0	0.00	26	988.00	988.00
EFT family	1	86.13	11	880.00	966.13
EFT senior	0	0.00	23	874.00	874.00
Couple - No Invoice	1	40.00	9	612.00	652.00
Family + 1	0	0.00	2	180.00	180.00
Employee	0	0.00	1	40.00	40.00
Family - No Invoice	0	0.00	1	23.04	23.04
DEPENDENT	65	0.00	449	0.00	0.00
Ohana Membership	0	0.00	2	0.00	0.00
TOTALS	358	22,068.63	2509	96,945.91	119,014.54

*** PLAN TYPE: Punchcard ***

Membership Type	Members Added		Payments Made		Total
4 Punch Pass	0	0.00	100	2,977.20	2,977.20
10 punch card pass	7	560.00	3	240.00	800.00
TOTALS	7	560.00	103	3,217.20	3,777.20

*** PLAN TYPE: Day-Pass ***

Membership Type	Members Added		Payments Made		Total
Regular Day Pass	0	0.00	418	4,016.80	4,016.80
2 Week Pass	0	0.00	31	1,393.20	1,393.20
Special Day Pass	0	0.00	153	1,184.64	1,184.64
Hotel Discount Day Pass	1	50.00	21	315.84	365.84
TOTALS	1	50.00	623	6,910.48	6,960.48

TOTALS	366	22,678.63	3235	107,073.59	129,752.22

Journal Reports

Journal Reports show details and summary of all activity.

Journal Summary Report 193

Journal Detail Report 194

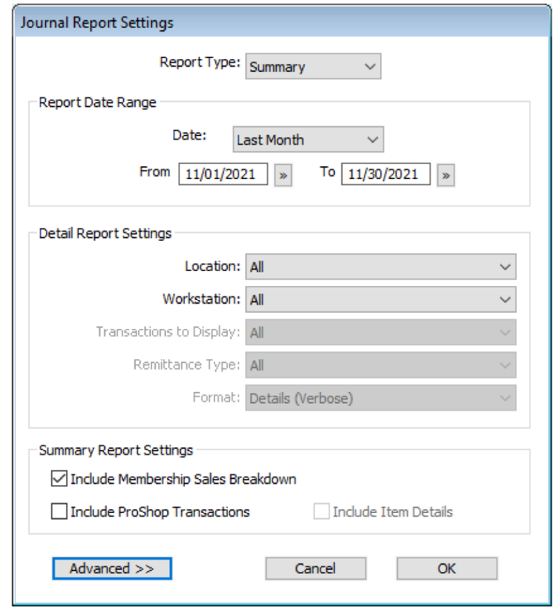
[Shift Journal Summary and Detail Reports](197)

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
```

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



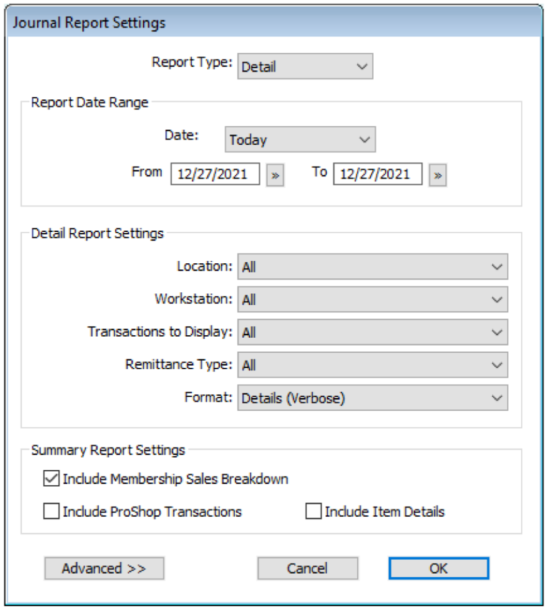
Select a **Date Range** for the report.

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.

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



Date Range

Select a Date Range for the report.

Workstation / Location

Select and Workstation and/or Location for the report.

Transactions to Display.

This setting allows you to display only transactions of the desired type. Here are some of the available transaction types to select:

- All – No filtering
- Money Transactions – Only those with money exchanged
- Add & Delete – Member additions and deletions
- Etc.
- *Select "More Options" to display a full list of all transaction types.*

Remittance Type

This setting allows you to filter on transactions of the specified remittance type:

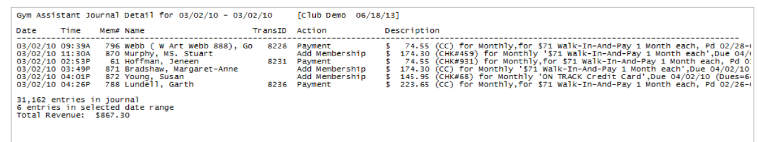
- All – No filtering
- Cash, Check, CC, OnAccount, EFT-Bank, EFT-CC
  1. Select a **Format** for the report:
- Show Details – Detailed (verbose) format (see above).
- Show Tabulated Columns – Column view to display revenue collected (see above).

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.

Format

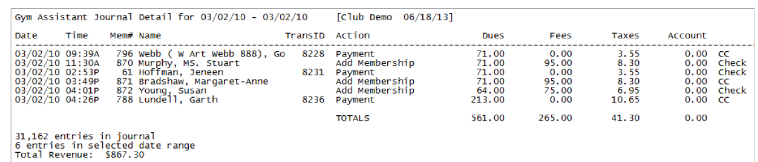
Select a format for the report.

Detail (verbose) format:



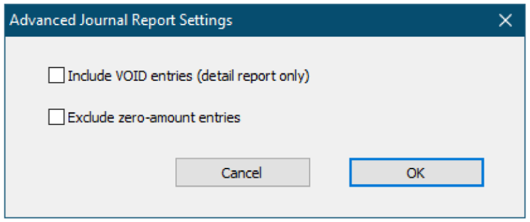
```
Gym Assistant Journal Detail for 03/02/10 - 03/02/10     [Club Demo  06/18/13]

Date     Time    Mem# Name                        TransID  Action          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
```

Tabulated Columns format:



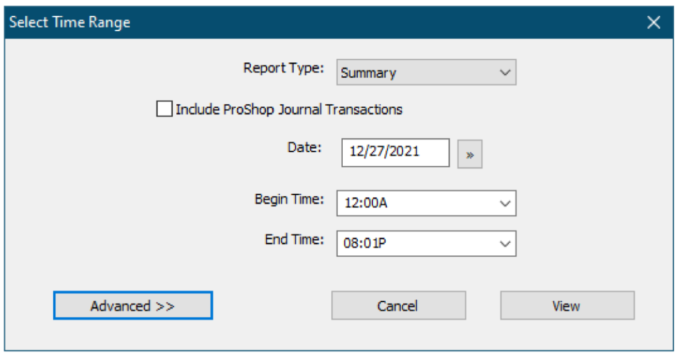
```
Gym Assistant Journal Detail for 03/02/10 - 03/02/10     [Club Demo  06/18/13]

Date     Time    Mem# Name                        TransID  Action              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
```

Click the **Advanced** button to see more report settings:



Shift Journal Summary and Detail Reports

The **Shift Journal Detail** and **Shift Journal Detail** reports display journal info limited to a specific time period on a specified date.



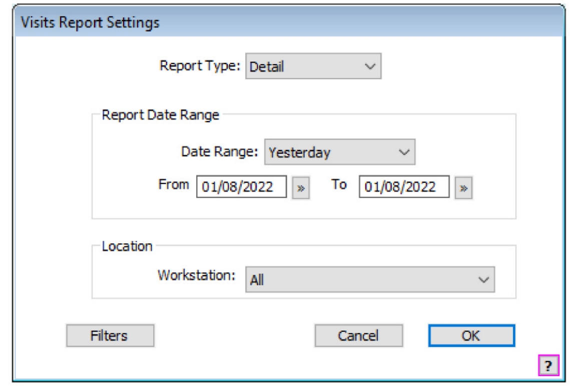
Visits Reports

Visits Reports show details and summary from the Visits Log.

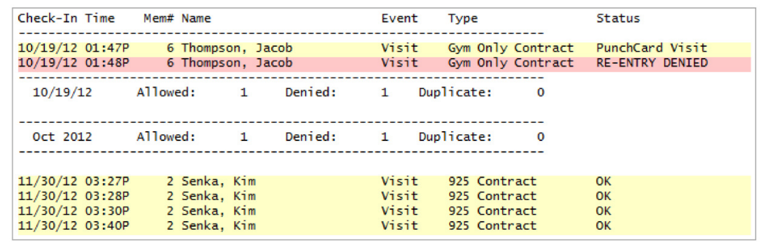
Visits Detail

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

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



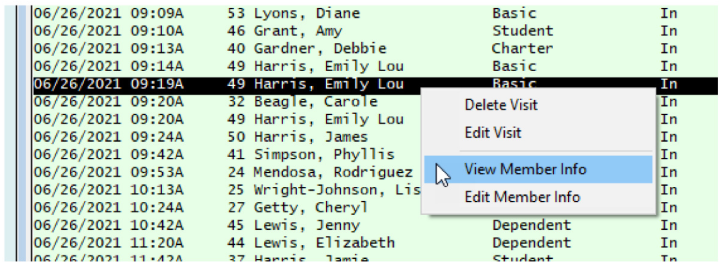
Specify a **Date Range** for the report, then click **OK**.



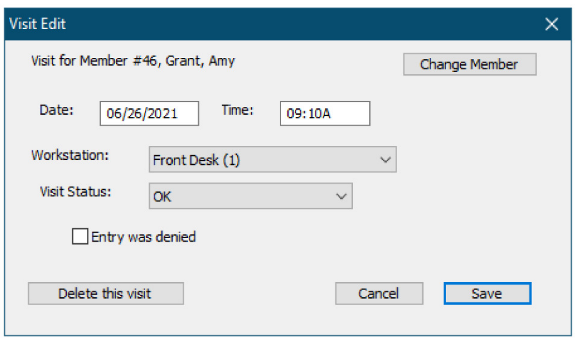
Viewing Visits Detail Report

In the **Visits Detail** list:

- Double-click on an entry to edit the visit.
- Right-click on any row to bring up a context menu showing you options.



Editing a Visit Entry



Click **Change Member** to change the member associated with the visit entry.

Workstation changes the Date/Time of the entry.

Visit Status values are OK, Payment Due, Inactive, Limited Hours Only, etc.

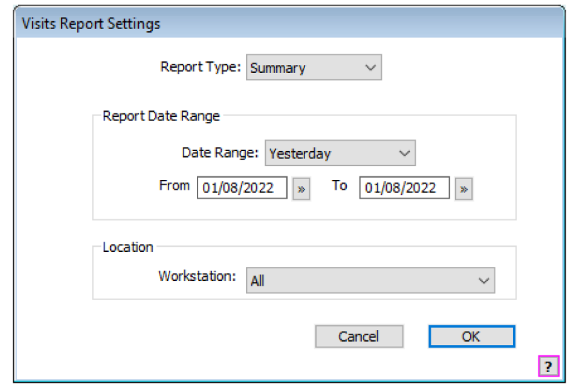
Check **Entry was denied** to mark the visits as Denied.

Click **Delete This Visit** to delete the visit.

Visits Summary

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

Select **Visits Summary** from the Reports menu.

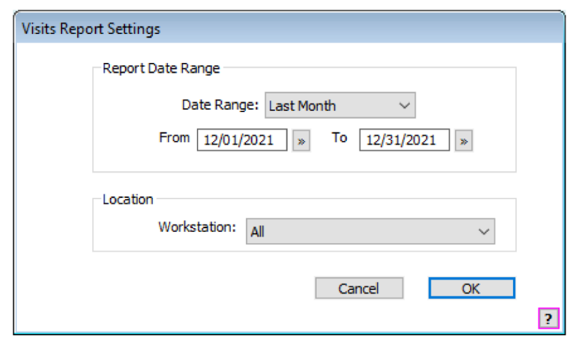


Specify a **Date Range** for the report, then click **OK**.

```
Date Range:  03/01/95 - 03/01/13

Total Visits Recorded:   41,735

Visits Allowed:          40,659
Visits Denied:            1,076
Duplicate Visits:             0
```

Visits by Member Type

Select **Visits by Member Type** from the **Reports** menu.

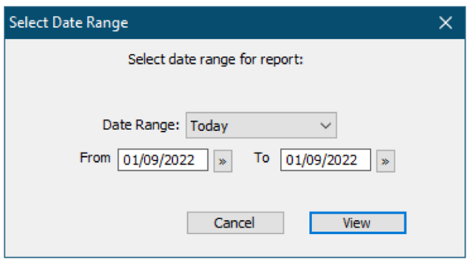


Select a **Date Range** and **Workstation** (if applicable), then click **OK**.

```
Visits by Workstation
06/25/2021 - 01/09/2022
Club Demo

Workstation                              Count
----------------------------------------------
Front Desk                                  12
JONHARLAN-PC                                24
7ELEVEN                                      0
* No Workstation Assigned                3,999
----------------------------------------------
Total Visits                             4,035
```

Visits by Workstation

Select **Visits by Member Type** from the **Reports** menu.



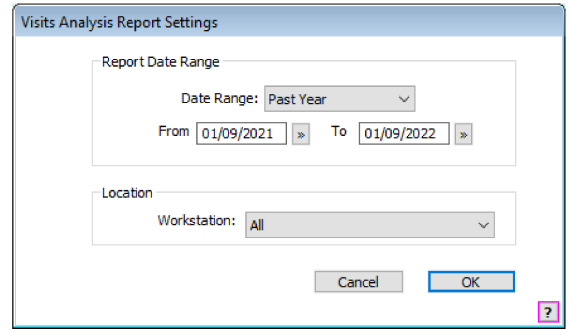
Select a **Date Range,** then click **OK**.

```
Visits by Workstation
06/25/2021 - 01/09/2022
Club Demo

Workstation                              Count
----------------------------------------------
Front Desk                                  12
JONHARLAN-PC                                24
7ELEVEN                                      0
* No Workstation Assigned                3,999
----------------------------------------------
Total Visits                             4,035
```

Visits Analysis

The **Visits Analysis Report** shows total and average number of visits every hour of every day of the week for a specified time. This report can be very useful to determine usage levels and staffing needs at different times.

Select **Visits Analysis** from the **Reports** menu.



Select a **Date Range** and **Workstation** (if applicable), then click **OK**.

*** TOTAL VISITS OVER 37 DAYS ***

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
12:00A	0	0	0	0	0	0	0	0
01:00A	0	0	0	0	0	0	0	0
02:00A	0	0	0	0	0	0	0	0
03:00A	0	0	0	0	0	0	0	0
04:00A	0	0	0	0	0	0	0	0
05:00A	0	0	0	0	0	0	0	0
06:00A	11	9	0	0	4	15	4	43
07:00A	25	22	0	0	30	32	32	141
08:00A	21	21	22	0	22	34	39	159
09:00A	25	24	15	0	31	38	39	172
10:00A	7	12	11	0	34	16	27	107
11:00A	9	13	13	0	7	11	12	65
12:00P	9	3	6	0	8	6	14	46
01:00P	10	7	0	0	9	8	7	41
02:00P	2	1	0	0	6	3	6	18
03:00P	7	0	0	0	13	7	9	36
04:00P	3	5	0	0	13	9	11	41
05:00P	13	7	0	0	18	16	14	68
06:00P	22	10	0	0	28	11	19	90
07:00P	5	1	0	0	11	4	4	25
08:00P	0	0	0	0	0	0	0	0
09:00P	0	0	0	0	0	0	0	0
10:00P	0	0	0	0	0	0	0	0
11:00P	0	0	0	0	0	0	0	0
Total	169	135	67	0	234	210	237	1,052

*** AVERAGE VISITS PER HOUR OVER 5 WEEKS ***

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
12:00A	0	0	0	0	0	0	0	0
01:00A	0	0	0	0	0	0	0	0
02:00A	0	0	0	0	0	0	0	0
03:00A	0	0	0	0	0	0	0	0
04:00A	0	0	0	0	0	0	0	0
05:00A	0	0	0	0	0	0	0	0
06:00A	2	1	0	0	0	3	0	8
07:00A	5	4	0	0	6	6	6	28
08:00A	4	4	4	0	4	6	7	31
09:00A	5	4	3	0	6	7	7	34
10:00A	1	2	2	0	6	3	5	21
11:00A	1	2	2	0	1	2	2	13
12:00P	1	0	1	0	1	1	2	9
01:00P	2	1	0	0	1	1	1	8
02:00P	0	0	0	0	1	0	1	3
03:00P	1	0	0	0	2	1	1	7
04:00P	0	1	0	0	2	1	2	8
05:00P	2	1	0	0	3	3	2	13
06:00P	4	2	0	0	5	2	3	18
07:00P	1	0	0	0	2	0	0	5
08:00P	0	0	0	0	0	0	0	0
09:00P	0	0	0	0	0	0	0	0
10:00P	0	0	0	0	0	0	0	0
11:00P	0	0	0	0	0	0	0	0
Total	33	27	13	0	46	42	47	210

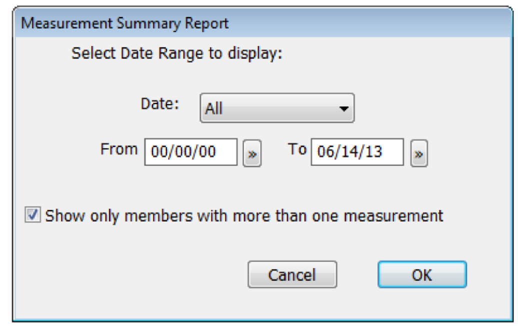
Measurement Reports

Gym Assistant can help you track your members' weights and measurements.

Measurement Summary

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

Select **Measurement Summary** from the **Reports** menu.



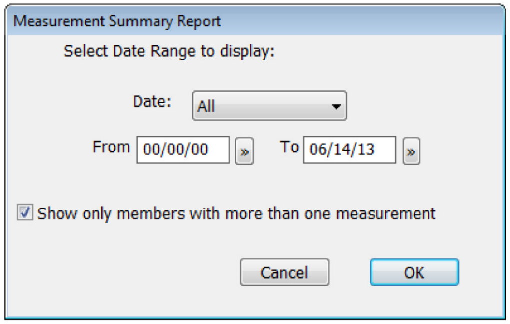
Specify the date range for the report.

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

37 measurement files found.

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

--- MEASUREMENTS ---
29 members lost a total of 2126 in
3 members gained a total of 349 in
```

Measurement Detail

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

Select **Measurement Detail** from the **Reports** menu.



Specify the date range for the report.

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

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

Punchcard Add-On Reports

Punchcard Usage/Activity

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

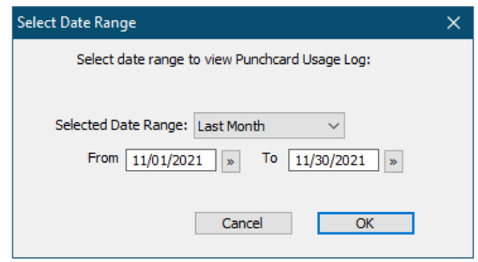
MEMBERSHIP ADD-ON USAGE SUMMARY

MEMBERSHIP ADD-ON USAGE SUMMARY

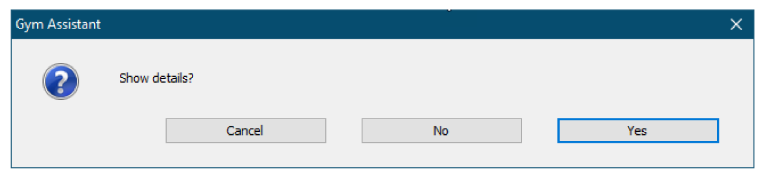
Add-On Name	Credits per Pkg	Cost per Pkg	Packages Purchased	Revenue Received	Credits Purchased	Credits Used	Unused Credits
Cardio Class	10	24.75	0	0.00	0	0	31
Fitness Class	12	100.00	0	0.00	0	0	0
Locker	20	25.00	1	20.25	10	5	35
Pilates	10	50.00	1	13.50	10	2	34
Smoothie	5	25.00	0	0.00	0	0	77
Spinning	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

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



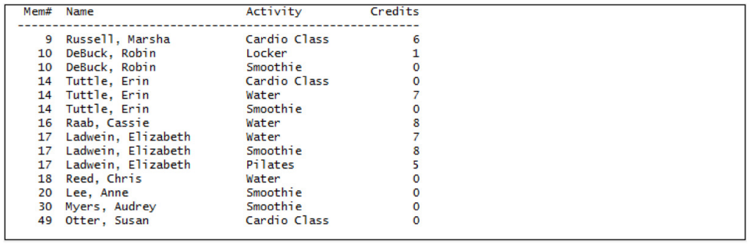
Specify the date range for the report, then click **OK**.



Click **Yes** to display details of each add-on credit used or click No to display only a summary of usage.

Members with Punchcard Credits

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



Mem#	Name	Activity	Credits
9	Russell, Marsha	Cardio Class	6
10	DeBuck, Robin	Locker	1
10	DeBuck, Robin	Smoothie	0
14	Tuttle, Erin	Cardio Class	0
14	Tuttle, Erin	Water	7
14	Tuttle, Erin	Smoothie	0
16	Raab, Cassie	Water	8
17	Ladwein, Elizabeth	Water	7
17	Ladwein, Elizabeth	Smoothie	8
17	Ladwein, Elizabeth	Pilates	5
18	Reed, Chris	Water	0
20	Lee, Anne	Smoothie	0
30	Myers, Audrey	Smoothie	0
49	Otter, Susan	Cardio Class	0

Other Reports

Audit Trail 207

Birthdays 208

Linked Memberships 209

Punchcard Usage/Activity

Monthly Add-Ons Report 210

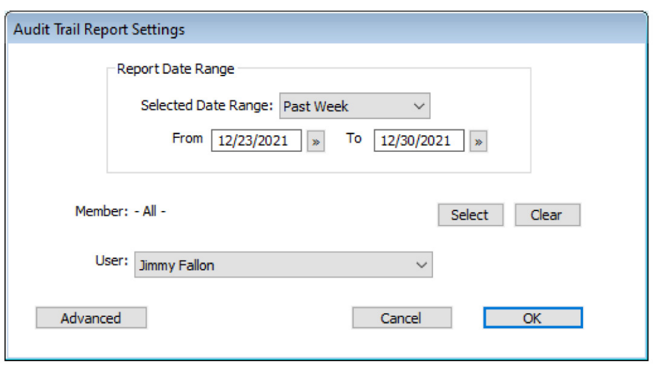
Members Due Now 211

Insurance Usage Reports 212

Audit Trail

Gym Assistant keeps track of all user access.

Select **Audit Trail** from the **Reports** menu.



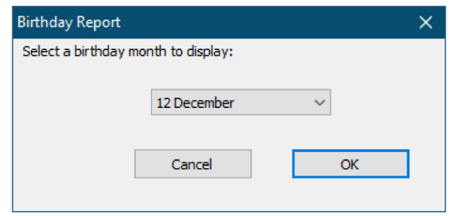
Specify a date range for the report.

If desired select a **Member** and/or a **User** to filter the report.

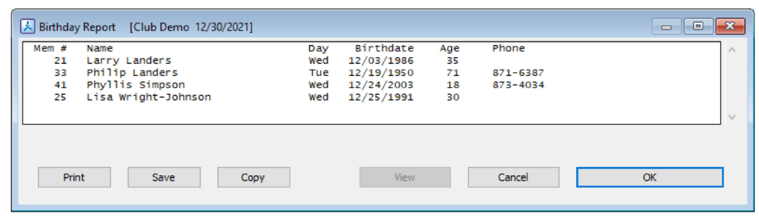
Birthdays

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

Select Birthdays from the Reports menu.



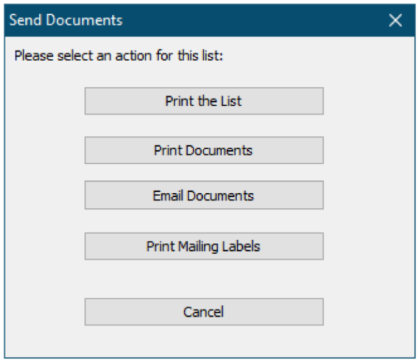
Select a month of the year to list birthdays, then click **OK**.



Mem #	Name	Day	Birthdate	Age	Phone
21	Larry Landers	Wed	12/03/1986	35	
33	Philip Landers	Tue	12/19/1950	71	871-6387
41	Phyllis Simpson	Wed	12/24/2003	18	873-4034
25	Lisa Wright-Johnson	Wed	12/25/1991	30	

The report lists the birthdate, age and phone for each member with an upcoming birthday, and the report is listed by date.

Click **OK** to continue.



Now select one of the following actions:

Print the List – Print the List

Print Documents – Print a letter to each member in the list

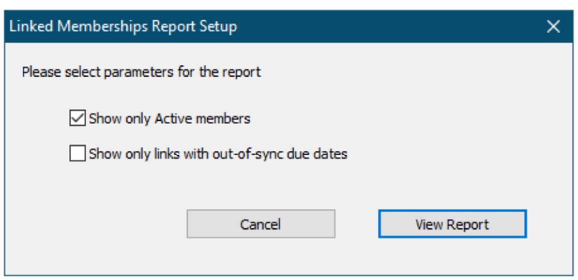
Email Documents – Send an email to each member in the list

Print Mailing Labels – Print mailing labels for 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.

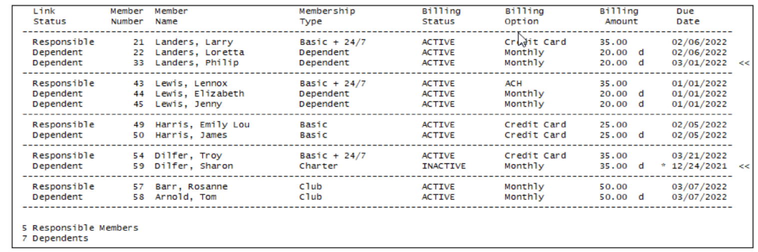
Select **Linked Memberships** from the **Reports** menu.



Check **Show only Active Members** to filter out family memberships for which no members are active.

Check **Show only links with out-of-sync-due dates** to show only families for which one of the members has a different due date from the primary member.

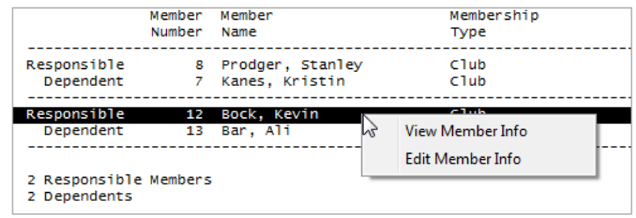
Click **View Report** to continue.



Link Status	Member Number	Member Name	Membership Type	Billing Status	Billing Option	Billing Amount	Due Date	
Responsible	21	Landers, Larry	Basic + 24/7	ACTIVE	Credit Card	35.00	02/06/2022	
Dependent	22	Landers, Loretta	Dependent	ACTIVE	Monthly	20.00 d	02/06/2022	
Dependent	33	Landers, Philip	Dependent	ACTIVE	Monthly	20.00 d	03/01/2022	<<
Responsible	43	Lewis, Lennox	Basic + 24/7	ACTIVE	ACH	35.00	01/01/2022	
Dependent	44	Lewis, Elizabeth	Dependent	ACTIVE	Monthly	20.00 d	01/01/2022	
Dependent	45	Lewis, Jenny	Dependent	ACTIVE	Monthly	20.00 d	01/01/2022	
Responsible	49	Harris, Emily Lou	Basic	ACTIVE	Credit Card	25.00	02/05/2022	
Dependent	50	Harris, James	Basic	ACTIVE	Credit Card	25.00 d	02/05/2022	
Responsible	54	Dilfer, Troy	Basic + 24/7	ACTIVE	Credit Card	35.00	03/21/2022	
Dependent	59	Dilfer, Sharon	Charter	INACTIVE	Monthly	35.00 d	* 12/24/2021	<<
Responsible	57	Barr, Rosanne	Club	ACTIVE	Monthly	50.00	03/07/2022	
Dependent	58	Arnold, Tom	Club	ACTIVE	Monthly	50.00 d	03/07/2022	

5 Responsible Members
7 Dependents

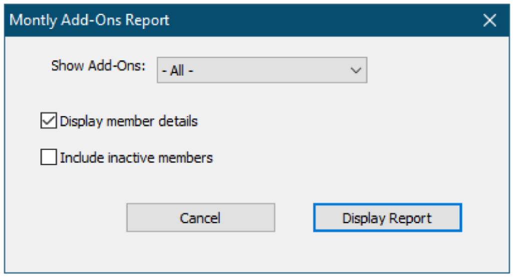
As with any member list, to view or edit a member right-click on member and select **View Member Info** or **Edit Member Info**.



Monthly Add-Ons Report

The **Monthly Add-Ons Report** shows a summary and details for all members with monthly add-ons.

Select **Monthly Add-Ons** from the **Reports** menu.



Select a single Add-On to display, or select "**- All -**".

Check **Display member details** to include a list of all members in the report.

Check **Include inactive members** to include all members in the report.

Click **Display Report** to continue.

```
==============================================================
Add-On Name                      Count        Revenue    Percent
==============================================================
15 Session Gym Card                  0           0.00       0.0%
Client Dues                          0           0.00       0.0%
POL/FIRE CROSSFIT                    0           0.00       0.0%
Tanning 1 Month                      0           0.00       0.0%
Tanning 2 week                       0           0.00       0.0%
Tanning add on                       1           5.00      25.0%
TANNING ADD ON                       0           0.00       0.0%
TRAIN RENT INC                       1          15.00      75.0%
Trainer Rent                         0           0.00       0.0%
--------------------------------------------------------------
MONTHLY TOTALS:                      2          20.00
--------------------------------------------------------------

MEMBER DETAILS
     3  Nrmkpd, Epoqc           Tanning add on         5.00
     6  Ypjnsxveb, Zueerd       TRAIN RENT INC        15.00
```

Members Due Now

The **Members Due Now** report is a quick way to list all members with a due date on or before today.

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

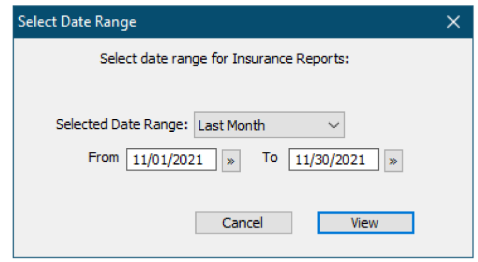
The Members Detail report filter window appears with the **Due Date** set to today's date:

Specify any additional filters for the report then click **Display Report**.

Insurance Usage Reports

Gym Assistant can generate standard visit reports for selected insurance plans.

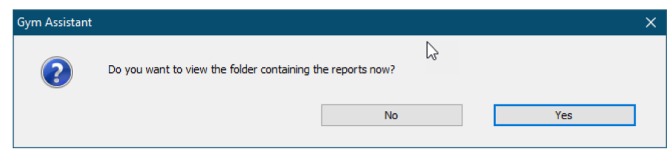
Select **Insurance Usage Reports** from the **Reports** menu.



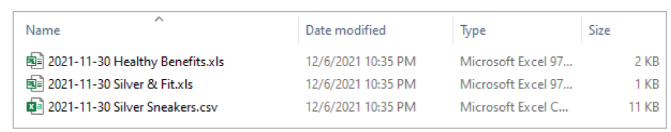
Select a date range for the report.

```
Silver Sneakers     324 visits
Silver & Fit        105 visits
Healthy Benefits    94 visits
```

The total number of visits for each insurance plan will be displayed. Click OK.



Click **Yes** to view the folder containing the reports.



You can now submit each of the files direct to the appropriate insurance plan.

Documents / Member Communications 10

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).

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 can easily send that document to appropriate members.

You can create multiple document templates for each type of communication in order to more efficiently manage your communications. Each template can contain place holders for information from the Gym Assistant database from both the member (name, address, phone, amount due, etc.) and from the business (business name, business address, business phone, etc.).

There are three template categories: **Forms**, **Letters** and **SMS Notifications**.

You can create an unlimited number of templates as you deem necessary.

Forms and Letters

Forms and Letters can be fully formatted, as they are stored and sent as HTML. They can also include images.

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 printed, emailed or sent to members for eSignature.

Gym Assistant includes generic **Contract** and **Waiver** templates. You can (and should) edit these templates, but you can also duplicate and edit multiple different versions of each template for different situations. For example you might have a special waiver for minors.

SMS Notifications

SMS Notifications are intended to send short notices, such as payment reminders.

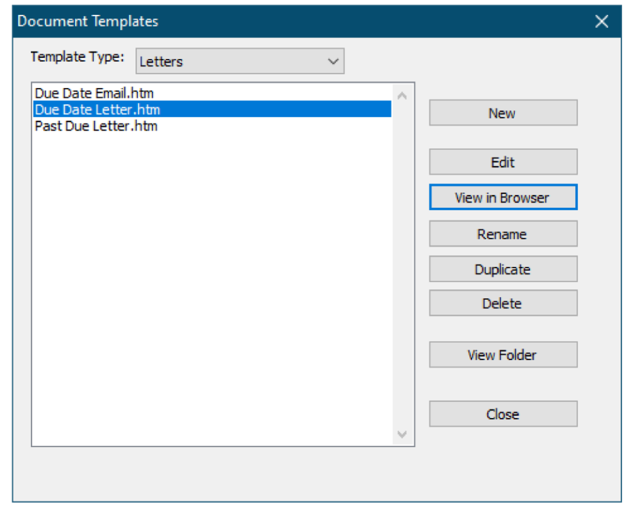
SMS Notifications are plain text, with no formatting allowed.

Gym Assistant includes generic templates for some common notifications, but you can edit these templates.

You can create an unlimited number of templates as necessary.

Editing Document Templates

Select **Edit Document Templates** from the **Documents** menu.



Template Type

Select **Forms**, **Letters** or **SMS Notifications**

New

Create a new template. (See Document Editor 215)

Edit

Edit the selected template. (See Document Editor 215)

View in Browser

View the template in your default web browser.

Rename

Rename the selected template.

Duplicate

Duplicate the selected template.

Delete

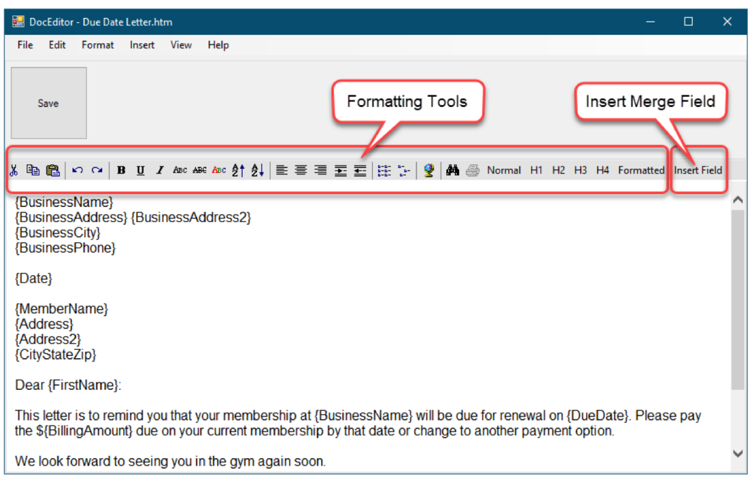
Delete the selected template.

View Folder

Show the folder containing the templates of this type.

DocEditor - Document Editor

DocEditor is an integrated Gym Assistant application for editing HTML documents.



Formatting Tools

Standard HTML formatting tools can be found along the toolbar at the top of the window.

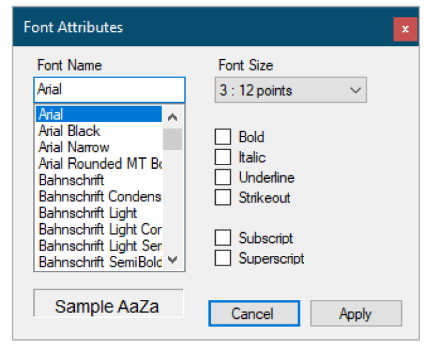
You will find more formatting tools in the **Format** and **Insert** menus.

Format Menu

You can specify formatting either on the toolbar or in the Format menu.

Document (menu only)

Specifies the default font for the document.



Note: The Document font is overwritten by any font specification within the document.

Font

Specify a font and style for the selected text.

Color

Specify the color for the selected text.

Normal

Remove any formatting for the selected text.

Bold / Italic / Underline

Specify style for the selected text.

Style Normal H1 H2 H3 H4 Formatted

Specify an HTML style for the selected text (None, H1, H2, etc.).

Justify

Justify the selected text (Left, Center, Right).

Size

Increase or Decrease font size for the selected text.

Indent

Increase or Decrease indentation for the selected text.

List

Format the selected lines as a Numbered list or Bullet list.

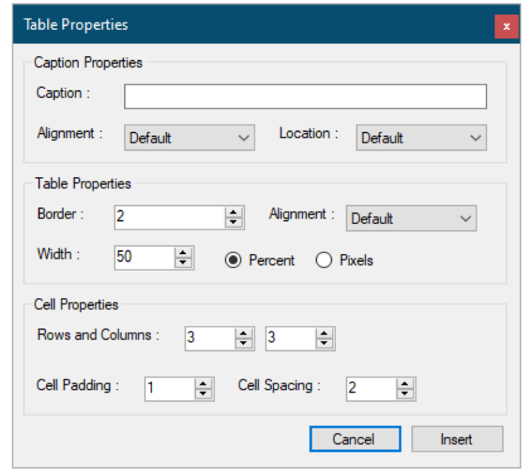
Insert menu

Horizontal Line

Insert a horizontal line at the current cursor position.

Table

Insert a table at the current cursor position.



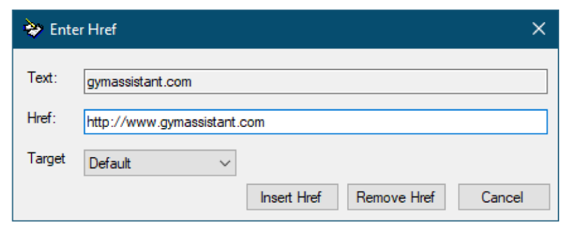
Specify the properties for the table.

To hide table gridlines specify a **Border** value of zero.

To change the properties of an existing table, right-click on the table and select **Table / Properties**.

Web Link

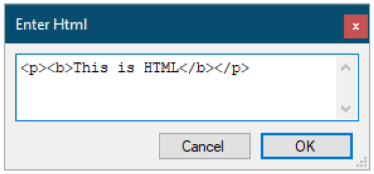
Insert a link for the selected text.



Enter the link in the Href field. This link must start with "http://" or another link type.

HTML

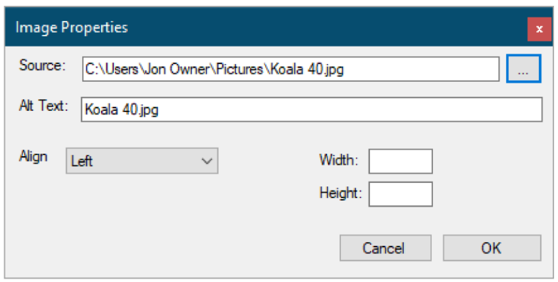
Insert raw HTML at the current cursor position.



The raw HTML that you insert must be properly formatted, of course.

Image

Insert an image at the current cursor position.

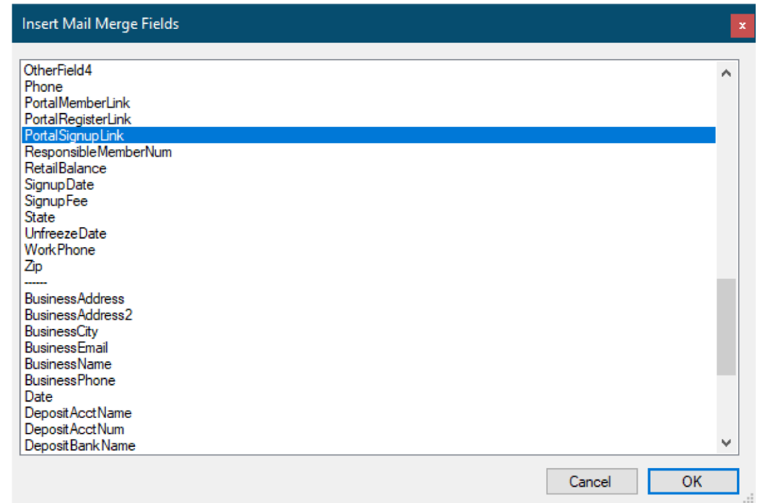


Merge Field

Insert a merge field. (see below)

Inserting Merge Fields

To insert a merge field click Insert Field. 



All Member fields are listed alphabetically, then all Business fields.

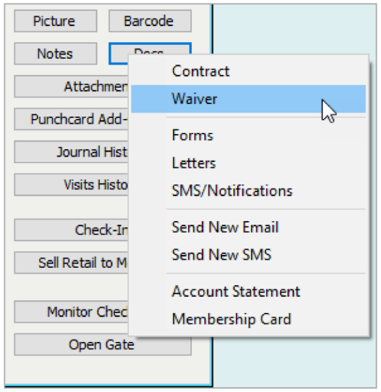
Select a field from the list and click **OK**.

Merge fields in template documents are enclosed within curly brackets, e.g. "{MemberName}". If you know the merge field name you can just type in the bracketed field name directly (instead of using **Insert Field** button.

Generate a Doc for a Single Member

Any document that you view can emailed, printer or eSigned.

While viewing a member record, click the **Docs** button or select **Documents** from the **Member** menu.



Contract

Displays the **Contract** document for this member, or allows you to select a template if you have more than one template that begins with the word "Contract".

Waiver

Displays the **Waiver** document for this member, or allows you to select a template if you have more than one template that begins with the word "Waiver".

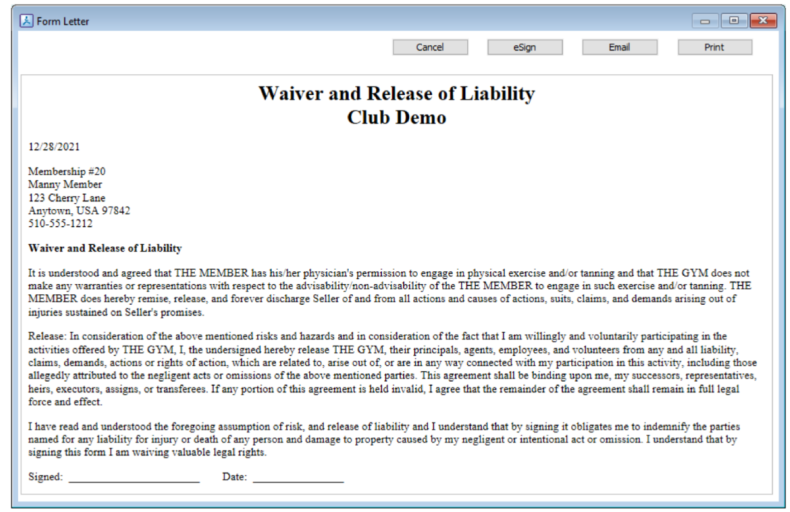
Forms

Displays a list of **Form** templates to choose from, then displays a document for this member from the selected template.

Letters

Displays a list of **Letter** templates to choose from, then displays a document for this member from the selected template.

Preview the Document



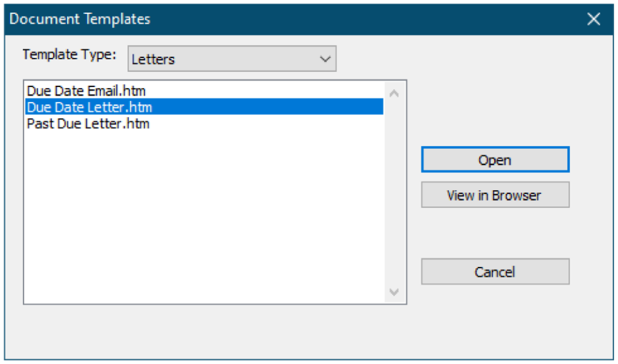
Click **Email** to email the document to the member.

Click **Print** to print the document.

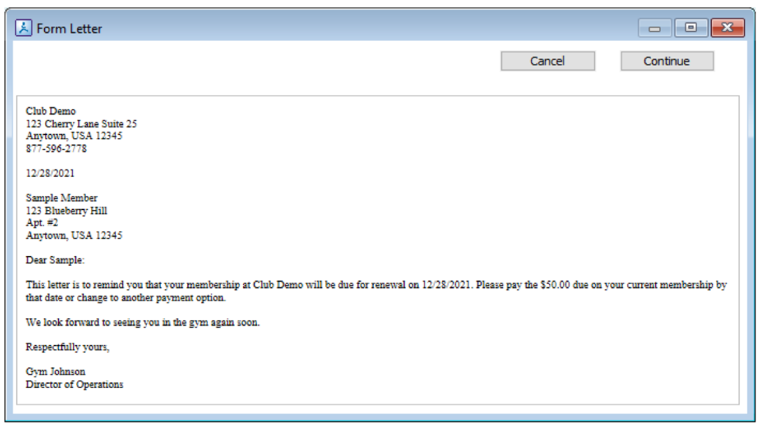
Click **eSign** to send to the member for eSignature using the Gym Assistant Member Portal. (See eSignatures 226)

Bulk Email or Printing

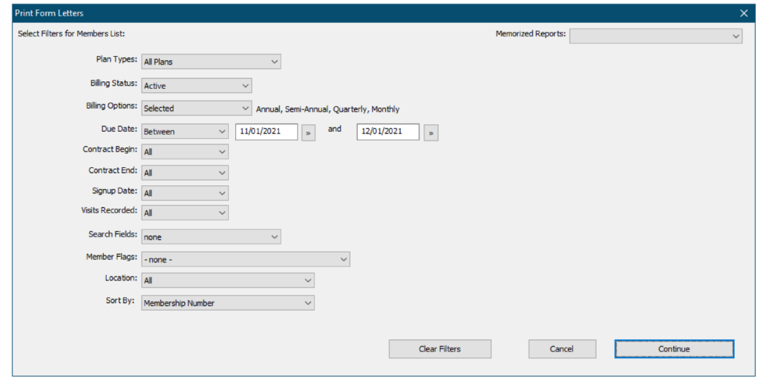
Select **Print Documents** or **Email Documents** from the **Documents** menu



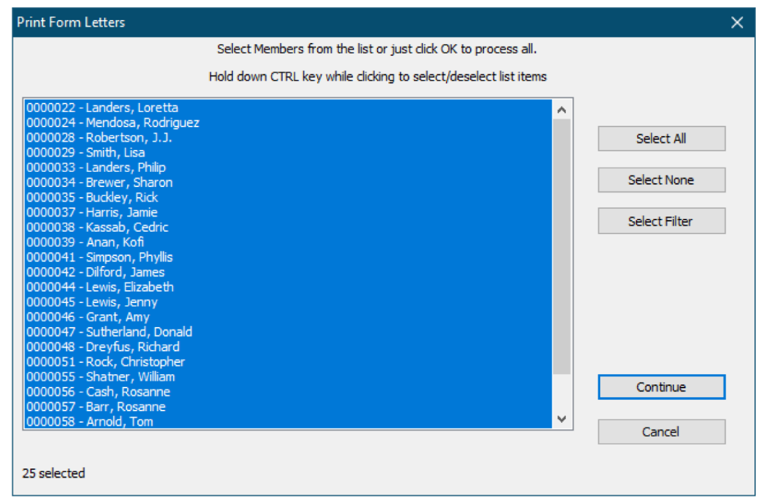
Select a template and click **Open**.



A sample document will be displayed. Click **Continue**.



Set filters as appropriate for this document, then click **Continue**. (See Selecting Members for a Report 178)



By default all the members from the specified filters are selected.

Select or unselect members from the list as needed.

- Hold down the **CTRL** while **clicking** on an individual member in the list to toggle that member's selection.
- Click **Select All** to select all in the list.
- Click **Select None** to unselect all members.
- Click **Select Filter** to apply another filter to the current list. (This allows you to more finely filter the list.)

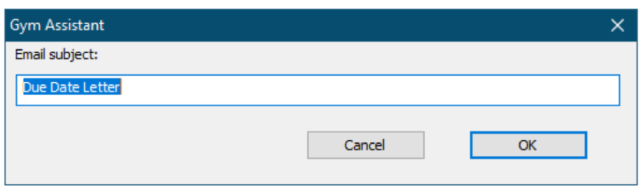
Click **Continue**.

If you are printing

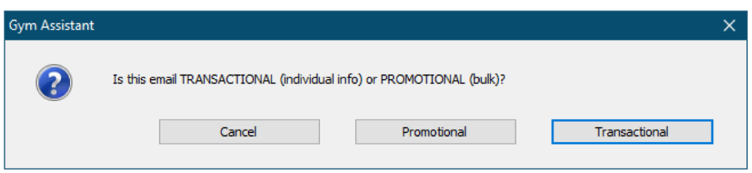
A document will be generated for each member from the template and printed or emailed.

If you are emailing

Enter a subject for the emails, then click OK.



Specify if the email is **Transactional** or **Promotional**.



Transactional emails entail a direct communication to a specific customer in regards to some transaction. Examples of transactional email would include a receipt from a purchase or a billing notice.

Promotional (or "marketing") emails are primarily intended to promote the business in some way. Examples of promotional email would be a newsletter or announcement of special deals.

Promotional emails must include an opt-out ("unsubscribe") option, which is required by the U.S. CAN-SPAM act.

All of the emails will be placed in the email queue for delivery in the background. (See Email 248)

eSignatures

Any document that you can create from a template can be sent to a member for eSignature. The member receives an SMS or email with a link to the document to be signed.

- After the member reviews and signs the document the signed document can be imported into Gym Assistant and saved as an Attachment in the member's record.

eSignatures Setup

Introduction

Gym Assistant eSignatures require setup on the Online Member Portal. Please contact Gym Assistant Support to activate your Member Portal account.

Member Portal Admin Registration

Portal Menu

Gym Assistant will now have a Portal menu.

eSignatures

With the Member Portal you can send documents to member for eSignature.

An eSignature document must be a complete document that the member will sign. It does not include areas for initials or additional fields to be filled.

Edit your document template for eSignature

No special changes need to be made to your document templates to prepare for eSignature. The member signature and a timestamp will automatically be placed at the end of the document.

Send a document to member for eSignature

While viewing a member record click the Docs button (on the right).

Select Contract, Waiver, Forms or Letters.

If you selected a command with more than one option, select an available document template from the list.

Click the eSign button. The document will be uploaded to the Member Portal.

Select the method you want for eSignature.

SMS – a text will be sent to the member with a link to click

Email – an email will be sent to the member with a link to click

Kiosk – the document will appear on a tablet or laptop that you hand to the member

Browser – the document will appear in a browser window

If you select SMS or Email then you then be asked if you wan to wait for eSignature completion.

If the member is standing in front of you and you sent the document via SMS then you can click Yes. Otherwise click No, because you will download the signed document later.

Retrieving eSigned Documents

All eSigned documents are saved on the Member Portal until they are retrieved (downloaded).

In Gym Assistant select Check Portal for Updates from the Portal menu.

Click Download eSignatures.

To download a signed document, click Download or Download All.

To view a document (signed or unsigned), click View.

To resend an unsigned document, click Resend or Resend All.

To delete a document, click Delete.

Downloading a Document into Gym Assistant

When you download a document Gym Assistant will automatically categorize the document if the name of the document matches one of the existing categories.

If Gym Assistant cannot determine the category then you will be asked to assign the document to a category.

Downloaded eDocuments are automatically placed in a member's Attachments folder.

Once a document is downloaded it will automatically be deleted from the Member Portal.

Using a tablet for in-person eSignature

For in-person eSignature of documents you can use a tablet or laptop computer.

In the eSign process select the Kiosk method to send the document.

Go to the following web page on the tablet:

www.gymassistant.com/e-sign

Enter your ClubID and the Password that was set above in the Portal Settings.

The document that you uploaded for eSignature will appear on the page automatically. If it does not appear then click the Refresh link.

Click on the document link (member #, member name, and document name) to view and sign.

Scroll down to the bottom of the document, sign in the signature box, then click Submit.

Gym Assistant will wait for the member to sign the document.

As soon as the member clicks the Submit button on the page Gym Assistant will automatically import the signed document into the member's record.

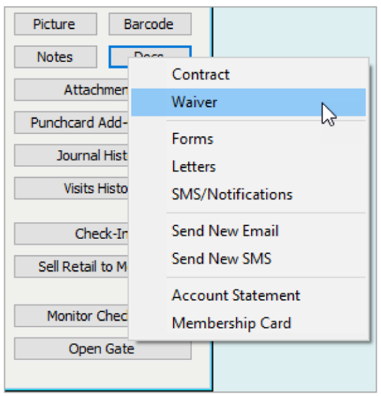
The signed document is also automatically emailed to the member.

If you do not want to wait for the member to sign the document you will be able to download the signed document at a later time.

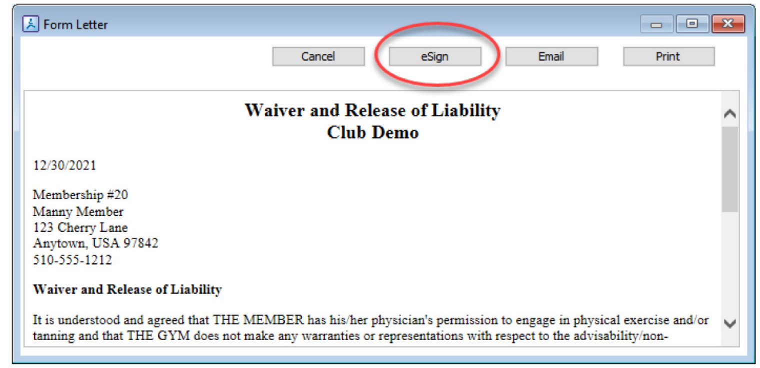
Sending a Doc for eSignature

Send a document to member for eSignature

While viewing a member record, click the **Docs** button or select **Documents** from the **Member** menu.

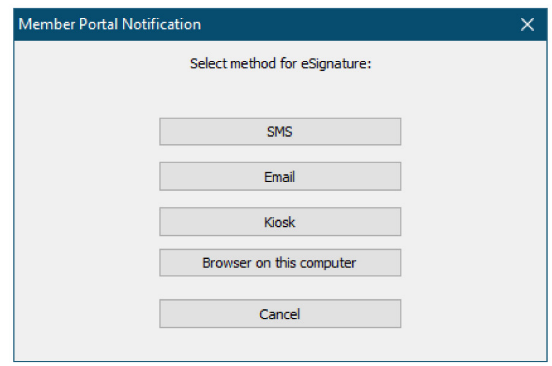


Select **Contract** or **Waiver**.



Click the **eSign** button. The document will be uploaded to the **Member Portal**.

Select the method you want for eSignature.



SMS

A text will be sent to the member with a link to click.

Email

An email will be sent to the member with a link to click.

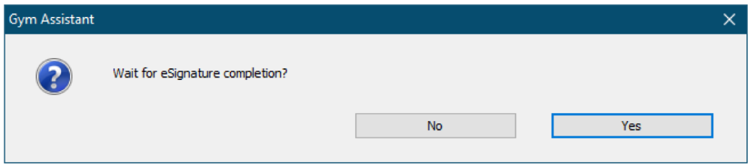
Kiosk

The document will appear on a tablet or laptop that you hand to the member.

Browser

The document will appear in a browser window.

If you select **SMS** or **Email** then you then be asked if you want to wait for eSignature completion.



If the member is standing in front of you and you sent the document via SMS then you can click **Yes**.

Otherwise click **No**, because you will download the signed document later.

Mailing Labels

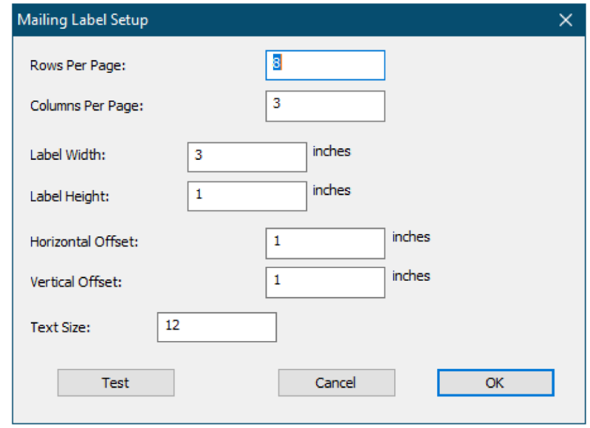
Gym Assistant can print mailing labels.

[Mailing Label Settings](232)

[Printing the Labels](233)

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

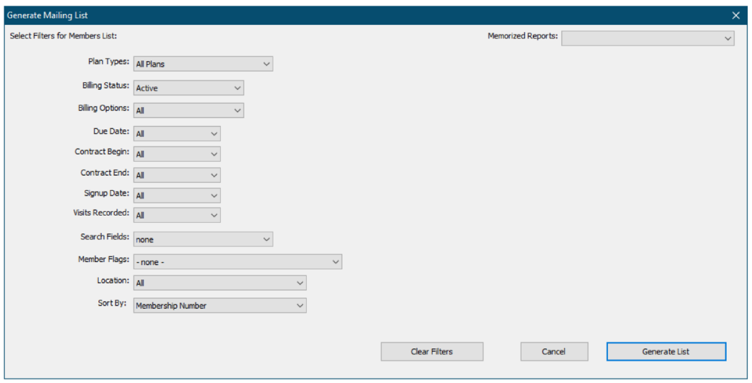
Text Size

Text size for labels

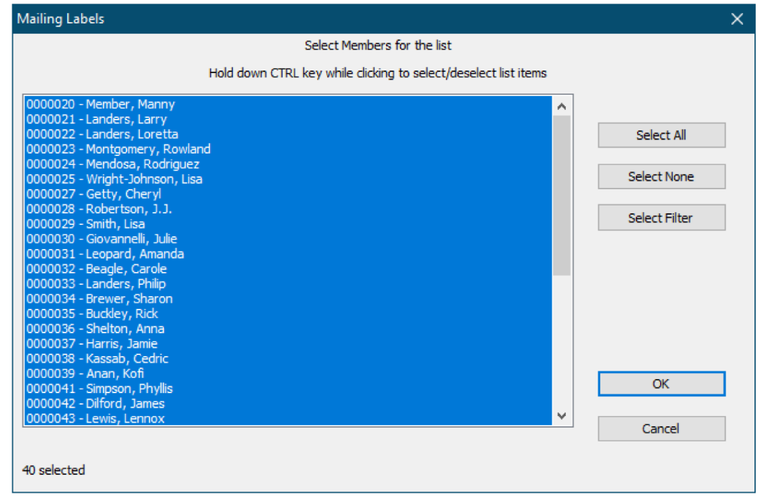
Click **Test** to print a test page.

Printing the Labels

Select **Print Mailing Labels** from the **Documents** menu.

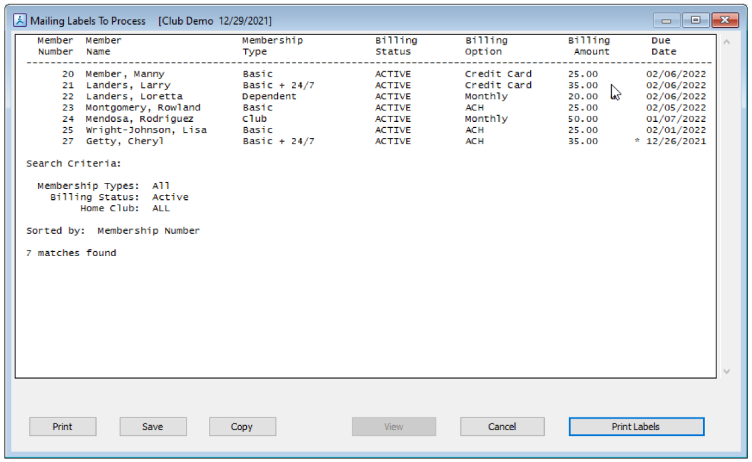


Set filters to generate a membership list as needed. (See Selecting Members for a Report 178)



Select or unselect members in the list by holding down the CTRL key while clicking, or click **Select All**.

Click **OK** to continue. The list of members will appear.



Click **Print Labels**.

Membership Cards

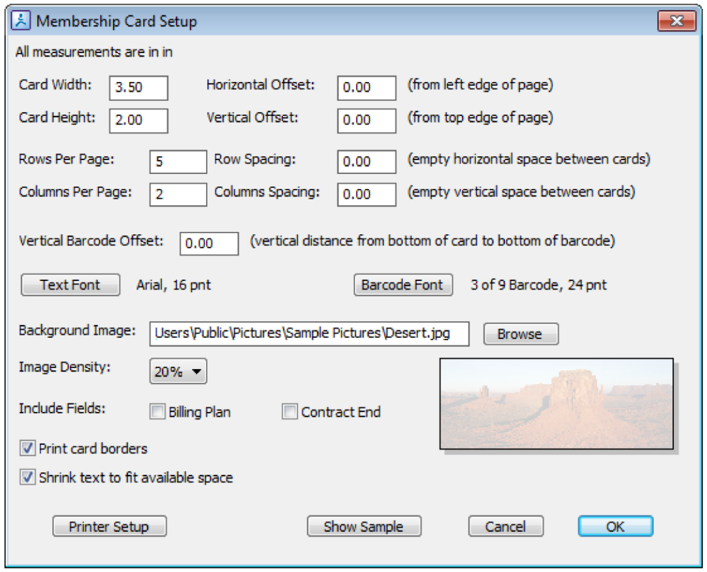
Gym Assistant can print membership cards for members, either one at a time on single sheets of paper or as a batch with multiple cards on one sheet.

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 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

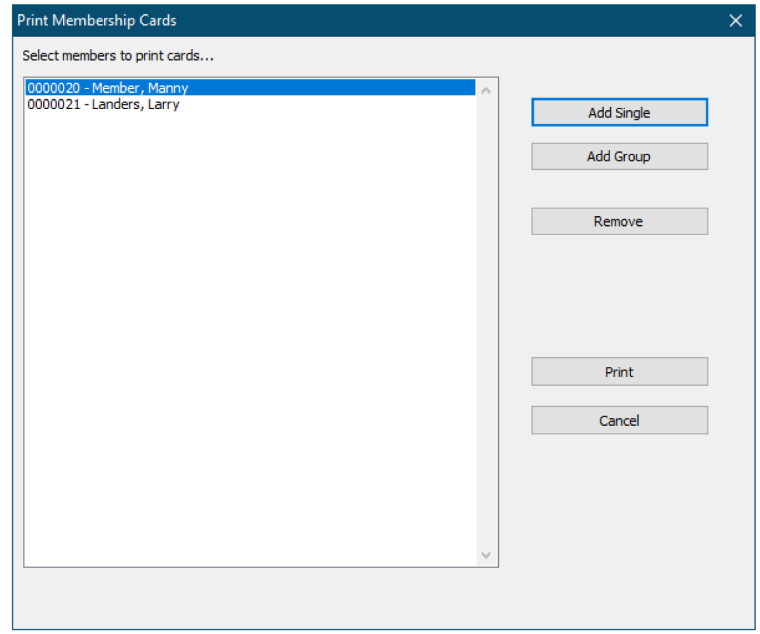
While viewing a member record, click the **Docs** button and select **Membership Card**, or select **Documents / Membership Card** from the **Member** menu.

The membership card will be displayed for preview.

Click **Print**.

Printing Multiple Membership Cards

Select **Print Membership Cards** from the **Documents** menu.



Click **Add Single** to add individual members. Enter a membership number or name to lookup a member.

Click **Add Group** to add a group of members. (See Selecting Members for a Report 178)

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 cards for all members in the list.

Statements and Invoices

Gym Assistant can generate both a **Statement** and an **Invoice** for each member.

A **Statement** shows activity during a period of time, and includes:

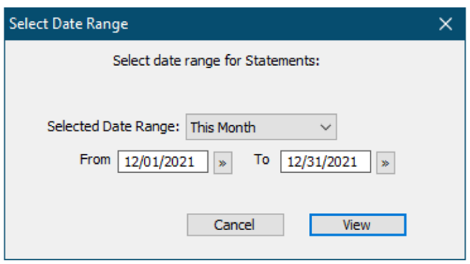
- Beginning Balance
- Ending Balance
- Charges and Credits

A Statement is most useful if members are accruing charges over the month, for instance charging **ProShop** purchases to account.

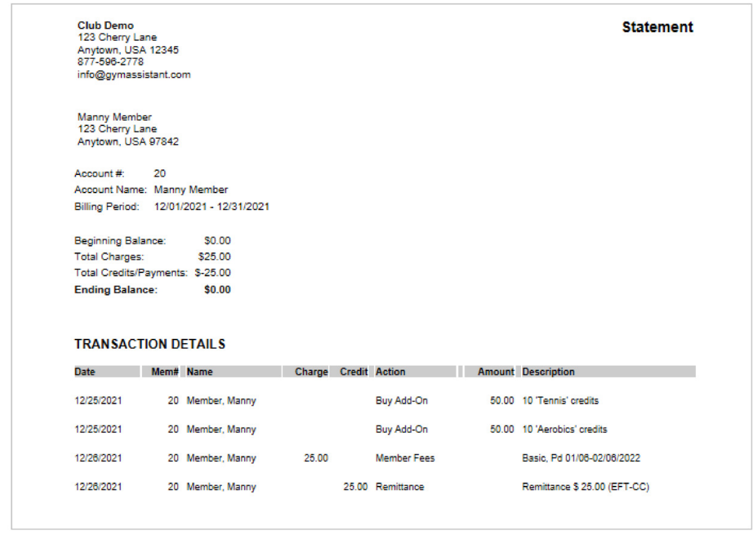
An **Invoice** tells the member how much the will owe on a specific date. It shows much less detail than a statement.

Statement

While viewing a member record, click the **Docs** button and select **Statement**, or select **Documents / Statement** from the **Member** menu.



Specify a date range, then click **View**.



Club Demo
123 Cherry Lane
Anytown, USA 12345
877-596-2778
info@gymassistant.com

Statement

Manny Member
123 Cherry Lane
Anytown, USA 97842

Account #: 20
Account Name: Manny Member
Billing Period: 12/01/2021 - 12/31/2021

Beginning Balance: $0.00
Total Charges: $25.00
Total Credits/Payments: $-25.00
Ending Balance: $0.00

TRANSACTION DETAILS

Date	Mem#	Name	Charge	Credit	Action	Amount	Description
12/25/2021	20	Member, Manny			Buy Add-On	50.00	10 'Tennis' credits
12/25/2021	20	Member, Manny			Buy Add-On	50.00	10 'Aerobics' credits
12/28/2021	20	Member, Manny	25.00		Member Fees		Basic, Pd 01/06-02/06/2022
12/28/2021	20	Member, Manny		25.00	Remittance		Remittance $ 25.00 (EFT-CC)

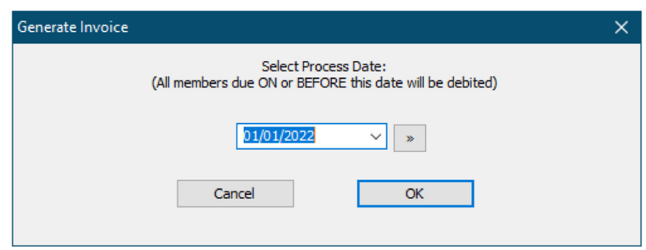
Click **Print** to print the statement to the member.

Click **Email** to email the statement to the member.

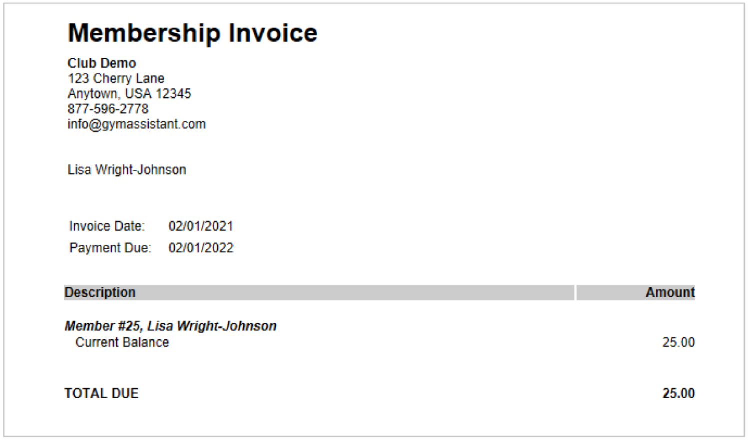
Click **Save** to save the statement to a file.

Invoice

While viewing a member record, click the **Docs** button and select **Invoice**, or select **Documents / Invoice** from the **Member** menu.



Specify a date. The invoice will show the amount that will be due for charge on or before that date.



Membership Invoice

Club Demo
123 Cherry Lane
Anytown, USA 12345
877-596-2778
info@gymassistant.com

Lisa Wright-Johnson

Invoice Date: 02/01/2021
Payment Due: 02/01/2022

Description	Amount
Member #25, Lisa Wright-Johnson	
Current Balance	25.00
TOTAL DUE	**25.00**

Click **Print** to print the statement to the member.

Click **Email** to email the statement to the member.

Invoice Settings 51

Gym Assistant can store file attachments in a member's record. Some examples of file attachments include:

- Signed contracts
- Signed waivers
- Photos
- Proof of vaccine
- Any scanned document

Documents can be added to a member record by the following methods:

- Import an eSignature document from the Online Member Portal
- Import a scanned document
- Import any document that is on your hard drive

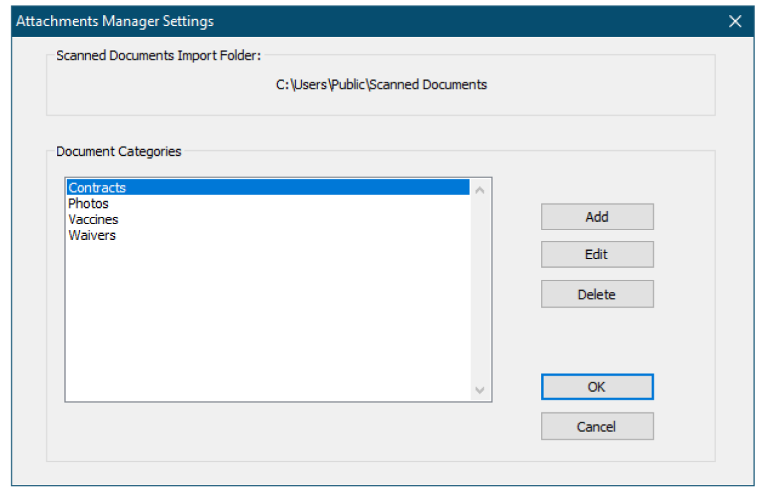
Attached documents can be categorized, e.g. Contracts, Waivers, Photos, etc.

Member File Attachments 11

All attachments are automatically date-stamped.

Attachment Settings

Select Attachments from the Settings menu to set your Document Categories.



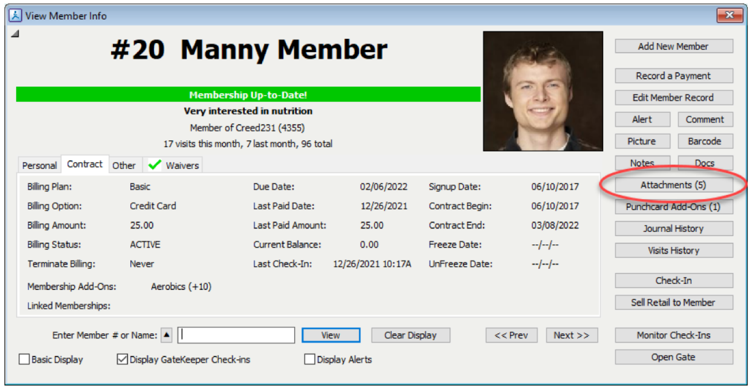
The **Scanned Documents Import Folder** field shows the folder from which the last document was imported.

Click **Add** to add a new category.

Click **Edit** to edit the selected category name.

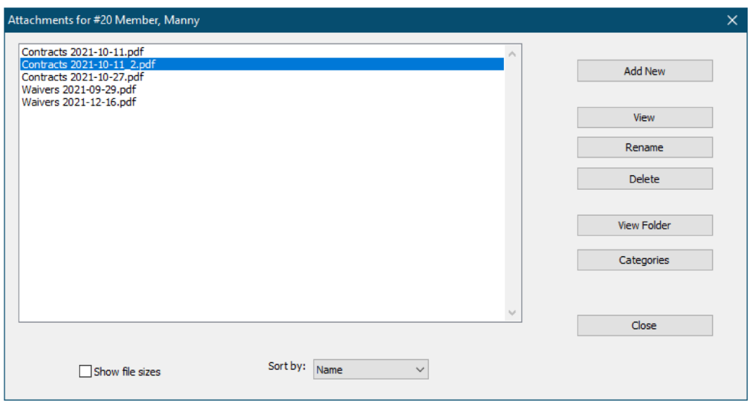
Click **Delete** to delete the selected category.

Managing Member Attachments



The Attachments button will show the number of attachments for the displayed member.

Click **Attachments**.



Click **Add New** to add a new attachment.

Click **View** (or double-click on an item in the list) to view the selected attachment.

Click **Rename** to change the name of the selected attachment.

Click **Delete** to delete the selected attachment.

Clicki **View Folder** to open the Attachments folder for this member.

Click **Categories** to open the Settings Attachments window.

Check the **Show File Sizes** box to display file sizes in the list.

You can **Sort** the list by name, date or size.

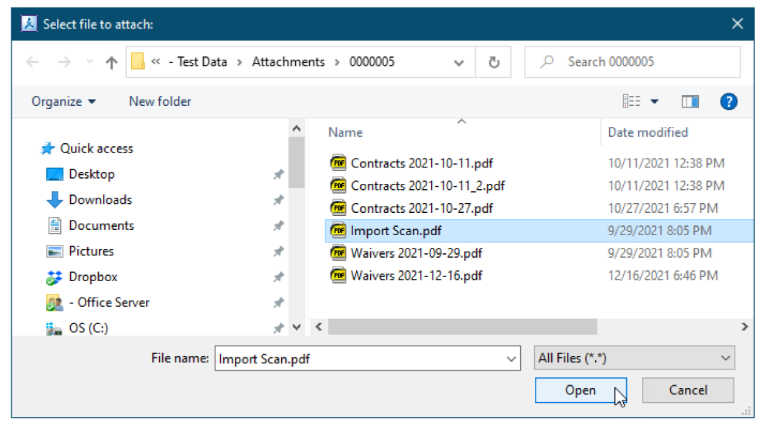
Importing a File Attachment

In the Attachments window for a member, click the Add New button.

Navigate to and open the document that you want to import.

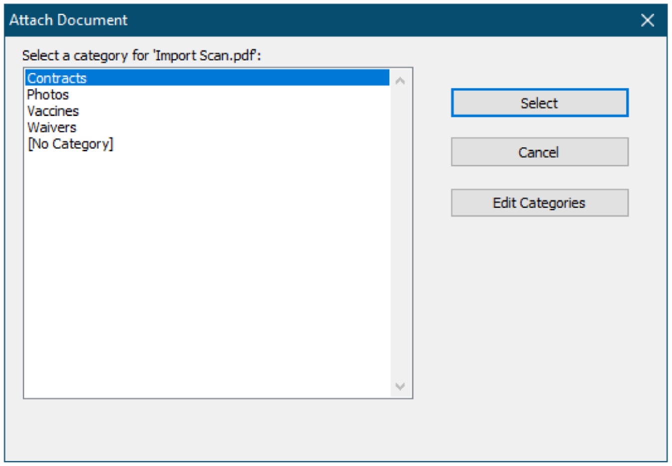
Note: The software will remember the location where you last imported a file. If you are scanning documents this would be the folder where the scanned documents are saved.

If you are importing documents that were received by email, then this might be your Downloads folder.

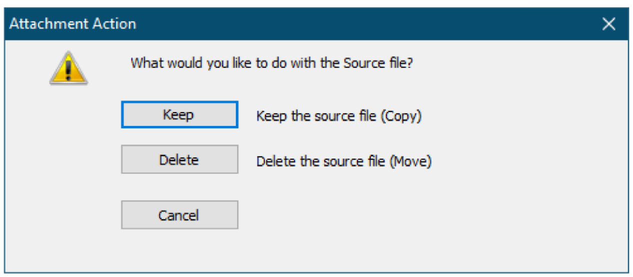


If the imported document name begins with the name of one of your Attachment Categories (e.g. "Waiver"), then the document category will be set automatically.

If not, then select a category for the document.



If the document will not fit a category then select "No Category".



Specify whether you want to delete the original file.

Click **Keep** to keep the original file and Copy it to the member's Attachments folder.

Click **Delete** to delete the original file and Move it to the member's Attachments folder.

If the source folder for the document is a temporary location (such as "Downloads" or "Scanned Documents" folder), then click Delete. This will delete the file from its original location.

If you want to keep the original document (in its original location), then click Copy.

The document has now been added to this member's record.

*Note: If you add a **Waiver** or **Vaccine** document the **Waivers tab** will automatically update to indicate that a waiver/vaccine have been received.*

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 Settings 70)
- 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.

SMTP

This option allows you to send emails through your an 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.

Email Settings 249

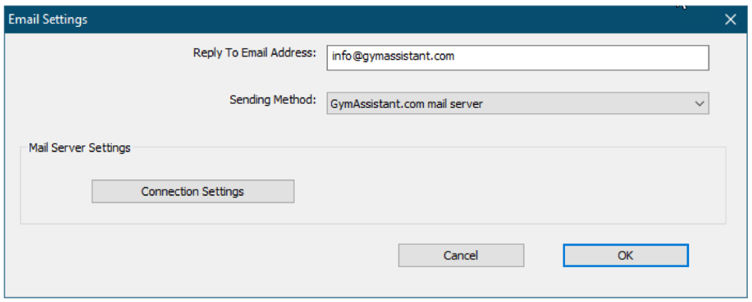
Bulk Email or Printing 223

Email Manager 250

View Email Log 253

Email Settings

Select **Email** from the **Settings** menu.



Enter a **Reply-To Email Address**. This is the email address to which a reply is sent if the recipient chooses to reply.

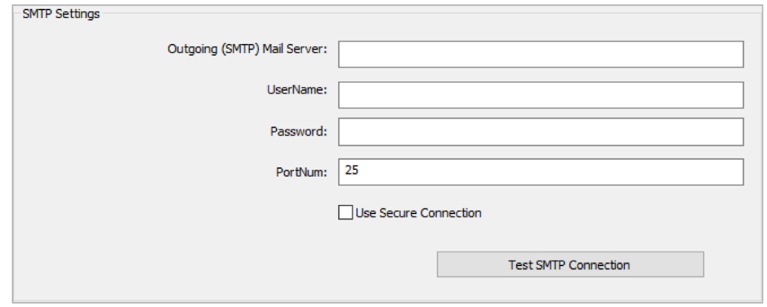
Select a **Sending Method**. (See above for a description of the different methods.)

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.

GymAssistant.com Mail Server Settings

Click **Connection Settings** to specify Online Connect 70 settings.

SMTP Settings



Outgoing (SMTP Mail Server)

Your mail server domain, e.g. "mail.yourdomain.com"

UserName / Password

Your SMTP UserName and Password

PortNum

PortNum required for access to mail server

User Secure Connection

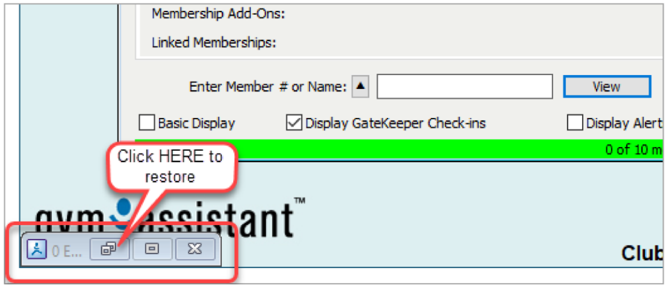
Check this box if your mail server requires a secure connection.

Email Manager

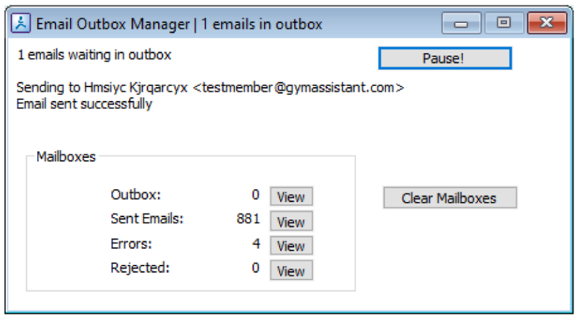
The **Email Manager** window handles sending of emails in the background while you work in Gym Assistant.

The Email Manager will appear only when it is working, and then it will shut down until it is needed again.

While the Email Manager is working it will appear minimized in the lower-left corner of the Gym Assistant application window.



To view the Email Manager, click the **Restore** icon in the minimized window, or select **Email Manager** from the **Documents** menu.



The Email Manager will display the current Outbox status:

- How many emails are waiting in the Outbox
- Current action, e.g. "Sending to XXXXX"
- Previous action, e.g. "Email sent successfully"

Click **Pause** to stop emails from sending. You can then click **Resume** to start sending again.

Note: The Email Manager will always restart automatically when you start Gym Assistant.

Counts will appear for each of the Mailboxes:

Outbox - Waiting to be sent

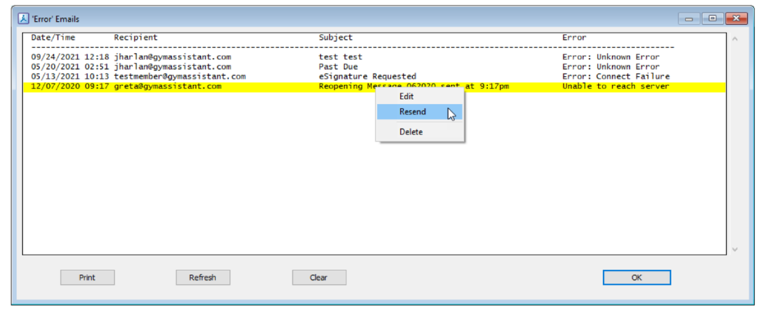
Sent Emails - Sent successfully

Errors - An error was encountered while sending

Rejected - Emails that were reject by the server

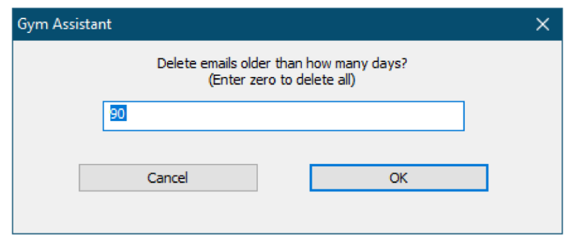
*Note: The Email Manager only shows emails that are sent (or are waiting to be sent) on **this computer**.*

Click **View** next to a mailbox to open it.



Right-click on an email to **Edit**, **Resend** or **Delete** it.

Click **Clear** to remove old messages.



Specify a number of days to keep. In the example above, emails more than 90 days old are deleted.

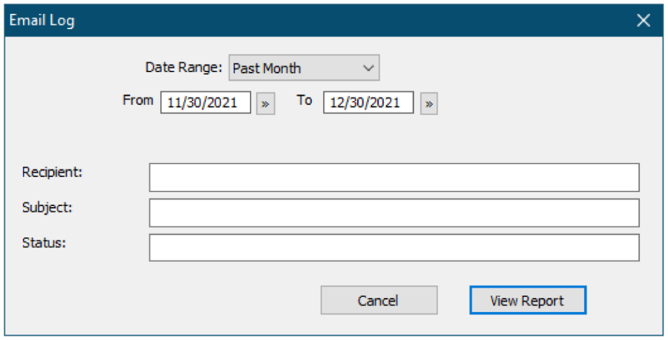
Enter zero to delete all the emails in the mailbox.

Email

12

View Email Log

Select **View Email Log** from the **Documents** menu.



Specify a Date Dange for the report. (See Selecting a Report Date Range 176)

Enter a **Recipient**, **Subject** or **Status** (or some combination of the three) to filter the report.

Click **View Report**.

Date/Time	Recipient	Subject	Status
12/06/2021 06:06P	Aqfrx Urxqht Ak <Aqfrx_UrxqhtAk@gymassistant.com>	CC payment rejected	OK
12/06/2021 06:06P	Bglcs Spdlw Jy <Bglcs_SpdlwJy@gymassistant.com>	CC payment rejected	OK
12/06/2021 06:06P	Iemvh Rbwzx <Iemvh_Rbwzx@gymassistant.com>	CC payment rejected	OK
12/06/2021 06:06P	Kramd Wihukpdc Al <Kramd_WihukpdcAl@gymassistant.com>	CC payment rejected	OK
12/06/2021 06:06P	Ppvkyz Lditeh <Ppvkyz_Lditeh@gymassistant.com>	CC payment rejected	OK
12/06/2021 06:06P	Dgxhi Lhvvsuv Fwnhh <Dgxhi_LhvvsuvFwnhh@gymassistant.com>	CC payment rejected	OK
12/06/2021 06:06P	Zzih Gun Pjnwf <Zzih_GunPjnwf@gymassistant.com>	CC payment rejected	OK
12/06/2021 06:07P	Bglcs Spdlw Jy <Bglcs_SpdlwJy@gymassistant.com>	CC payment rejected	OK
12/06/2021 06:07P	Dgxhi Lhvvsuv Fwnhh <Dgxhi_LhvvsuvFwnhh@gymassistant.com>	CC payment rejected	OK

Gym Assistant provides multiple methods to backup your data:

- Manual backup to external disk
- Automatic Archive backup to disk
- Automatic Online backup to the GymAssistant.com web server

We strongly recommend that you review your backup procedures every few months to ensure that your data is kept safe.

Backup Best Practices 254

Data Backup and Restore

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Backup Best Practices

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.In addition to the standard backup methods included in Gym Assistant you might also consider the following alternatives:

Recommended Additional Backup Methods

Cloud Backup Services

Cloud backup services such as Carbonite, BackBlaze and iDrive 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 Local Network 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 save archive backups to that server.

Backup to Another Computer

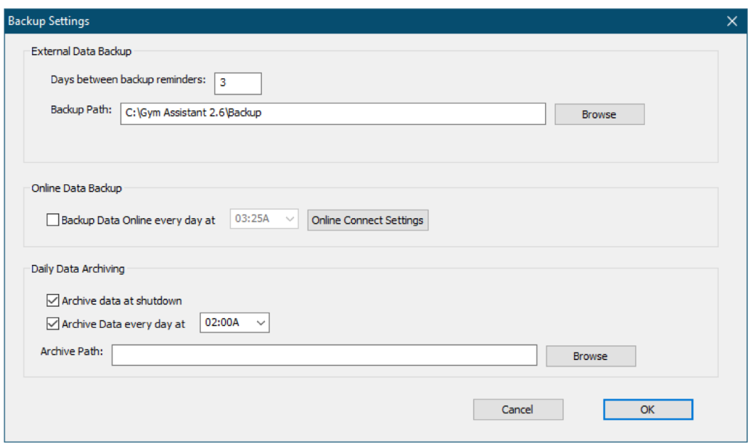
Just copy your most recent backup file occasionally to another computer on your network. If your main computer hard drive dies then you've got a backup immediately available for restore.

Got any questions? Reach out to us!

Please call or email support@gymassistant.com if you have any questions about backing up your data. We want to ensure that your data is safe!

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 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.

How often should you do a backup? *How many days worth of data are you willing to lose?*

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.

Click **Browse** to navigate to the desired file location.

Leave this field blank to backup to a Backup folder within the Gym Assistant Data folder.

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 stored, 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 **Online Connect Settings** to setup your Online Connect account.

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

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.

Archive Path

Specify the path where you want the archive files saved.

Click **Browse** to navigate to the desired file location.

Leave this field blank to save archive backups in an Archive folder with the default Backup folder (above).

Backing Up Your Data

Your Gym Assistant data consists of two categories: Critical data and Auxiliary data.

Critical Data is dynamic data considered vital to day-to-day operations, information that changes often and for which access is required real-time. Critical data includes:

- Member records
- Member notes
- Journal entries

- Visits

Auxiliary Data is static data that is considered less critical for real-time operations. Auxiliary data includes:

- Photos
- File Attachments

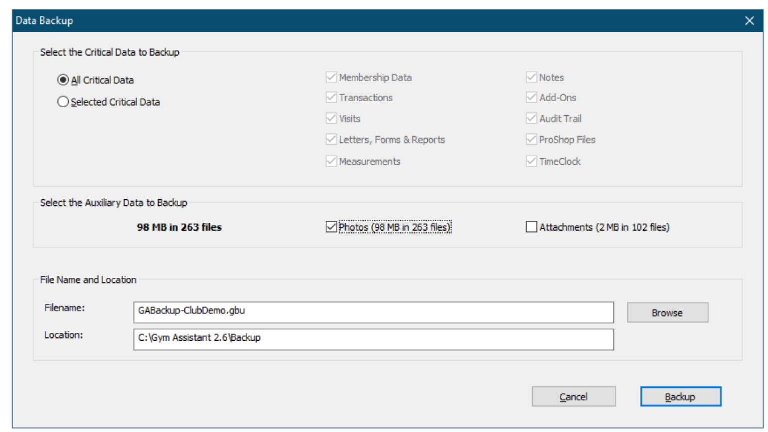
Some clubs will have no auxiliary data, but some will have many GB of photos and attachments.

Critical data should be backed up more often.

Manual Backup

You should manually backup your data at regular intervals. A manual backup is the most comprehensive level of data backup. A manual backup can include all of your data (both Critical and Auxiliary).

Select **Backup / To Disk** from the **File** menu.



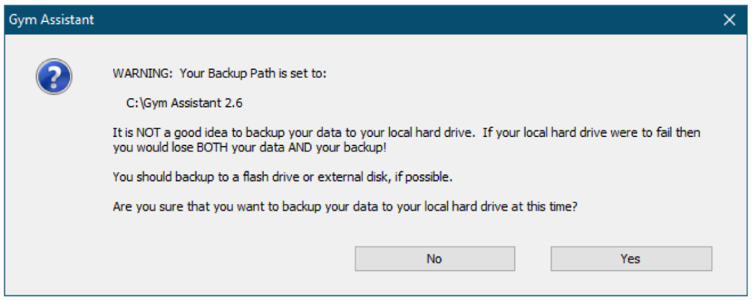
Select the data you want to backup.

Note: If you have a significant amount of Auxiliary data your backup may take a long time.

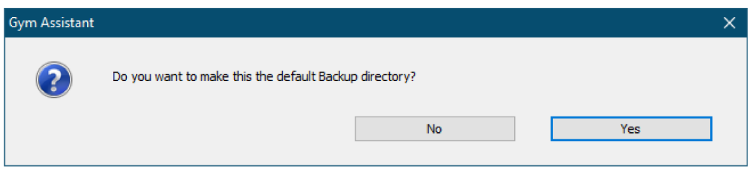
Click **Browse** to change the **Filename** and **Location** where the backup will be saved.

Click **Backup** to continue.

If you are saving the backup to your hard drive then you will be warned that this is potentially a bad idea.



If you changed the location where the data is saved then you will be asked if you want to make this the new Default Backup Directory.



The successful backup will be reported.

Data Archive

Gym Assistant will automatically archive your critical data every day to the Archive Path folder specified in Backup Settings 255.

Archived data is a full "Snapshot" of your critical data every day, which can be useful should your live data files get corrupted or otherwise made unreadable. Archived data can also help you to "rewind" your data back to an earlier time if you accidentally make a big change to your data that can't be undone. For example, a rogue employee deletes a bunch (or all) or of your member records.

Gym Assistant will save up to 90 days of archived data files. The oldest file is deleted once the limit of 90 files is reached.

The Data Archiving will occur every day at the time specified in Backup Settings 255 or when you exit the application.

The archive process should only take a few seconds, since it does not include Photos and Attachments.

To trigger an archive backup at any time (maybe you're planning to make a big data change and want to backup just-in-case):

- Select **Special Features** from the **Utilities** menu.
- Select "**Archive Current Data**", then click OK.

Online Backup

Gym Assistant will automatically backup your critical data every day to the Gym Assistant web server.

The Online Backup will occur every day at the time specified in Backup Settings 255 or when you exit the application.

Online Backup is only available to customers with paid Annual Support. If your support is not up-to-date, please contact Gym Assistant Sales.

The Gym Assistant Online Backup service does not include auxiliary data (e.g. photos and attachments).

Note: Only one backup file is kept online. Whenever you do an Online Backup your current data on-disk will replace any backup file that you have stored online.

To trigger an Online Backup manually, select **Backup / To Online** from the **File** menu.

Select the data you want to backup (as above), and click **Backup**.

Restoring Your Data

Backup from Disk

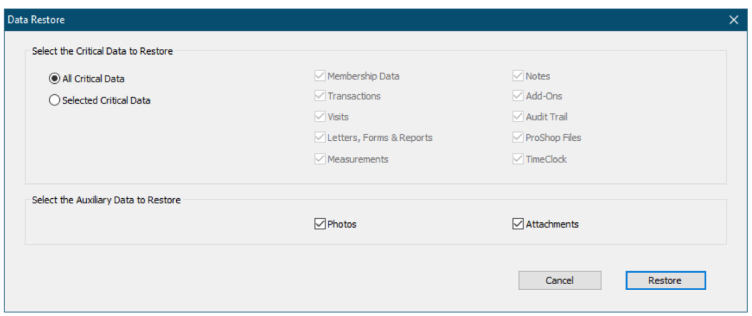
You can restore all or just some of your data from a backup.

Note: When you restore data from a backup, all current data of that type will be deleted. For example, if you restore Membership Data all current member data is replaced with data from the backup file.

Select **Restore / From Disk** from the **File** menu.

Navigate to and open a Gym Assistant backup (.gbu) file.

Select the data you want to restore.

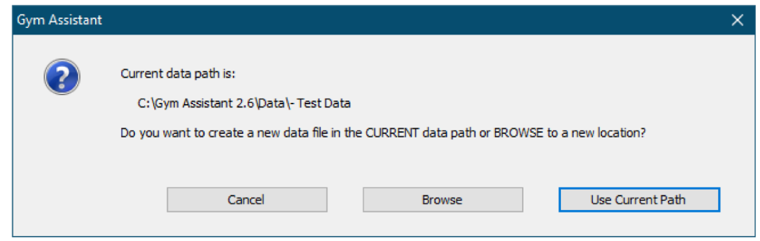


You can choose to restore only one or more data types. All other data types will retain their current data.

Note: All data types that you select may not exist in the backup file that you opened. Any data types that are not in the file will leave the current data unaffected once you restore.

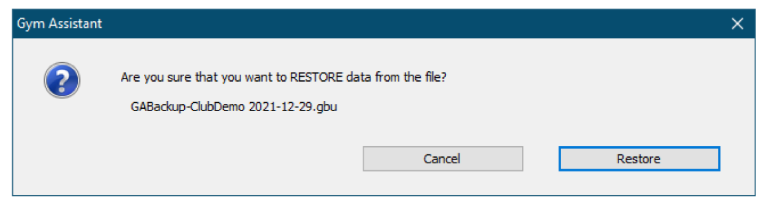
Click **Restore** to continue.

You will be asked to confirm the data path to which you will restore.



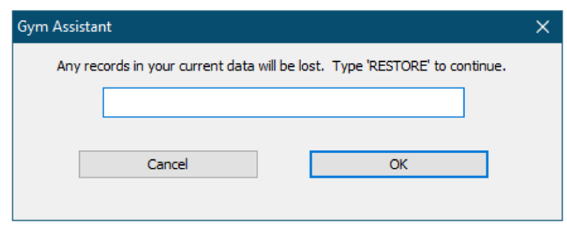
Click **Use Current Path**, or click **Browse** to navigate to a different data path.

You will be asked to confirm that you want to restore.



Click **Restore** to continue.

You will be asked one more time to confirm.



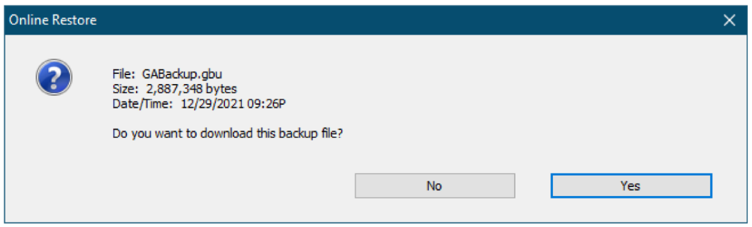
Type in the word "RESTORE" (not case sensitive), then click **OK**.

After restoring your data Gym Assistant will restart.

Backup from Online

Select **Restore / From Online** from the **File** menu.

Gym Assistant will check for the existence of an online backup file.



Click **Yes** to continue.

Gym Assistant will download your online backup file.

Select the data you want to restore and proceed exactly as above for Backup from Disk.

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 Gym Assistant Support. We can get you back in there!

Permissions

A set of permissions specifies what functions are accessible to a user.

Users

Each person who uses the software should be added as a **User**. Each User is assigned a set of **Permissions**.

Permission Groups

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 define the following permission groups:

- **Manager** - full access to all features
- **Staff** -- access only to check-in, add new members, receive payments

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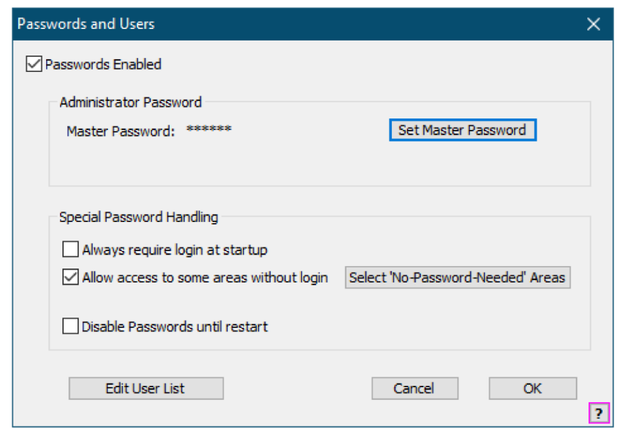
Editing the User List 267

Passwords and Users Settings

Select **Passwords and Users** from the **Settings** menu.



Note: To fully enable passwords, you must set a Master Password.

Passwords Enabled

Check this box to enable passwords.

Set Master Password

Click to set the Master Password.

Note: Gym Assistant does not enforce requirements for password strength. Create passwords at your own discretion according to your own security needs.

Always require login at startup

Check this box to require that a valid user password is entered to start the program.

Allow access to some areas without login

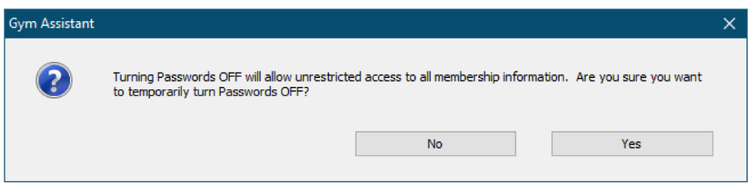
Check this box to allow access to some features without a password. This feature is added as a convenience, so use it at your discretion.

Select 'No-Password-Needed' Areas

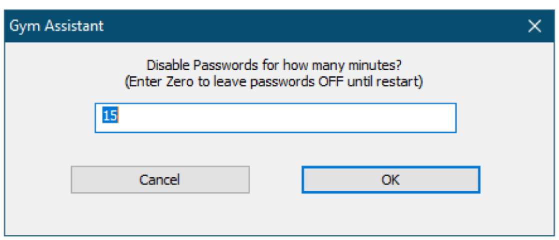
Click to select the areas that allow access without a password. (See Setting Permissions for a User or Group 268)

Disable Passwords until restart

Check this box to temporarily disable passwords.

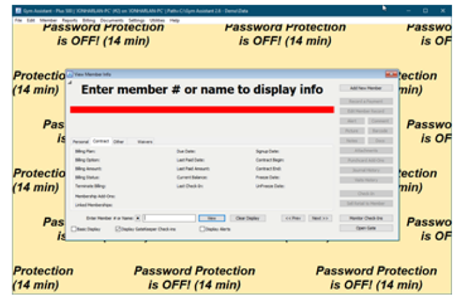


Click **Yes** to continue.



Enter a number of minutes to disable passwords, or enter zero to leave passwords off until you restart the program.

Note: While passwords are turned off the background of the Gym Assistant will prominently display the Password OFF status (below).

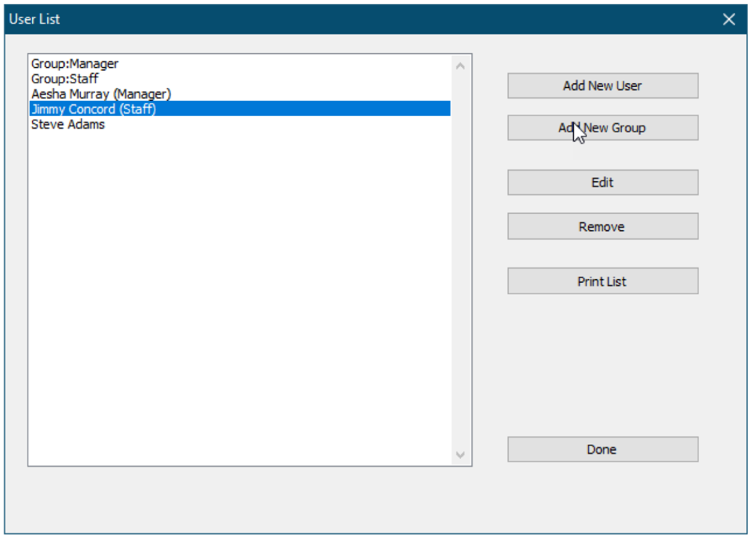


Edit User List

Click to set the User List. (See Editing the User List 267)

Editing the User List

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



Permission Groups are listed first, followed by Users.

(See Setting Permissions for a User or Group 268)

Add New User

Click to add a new user.

Add New Group

Click to add a new group.

Edit

Edit permissions for the selected.

Remove

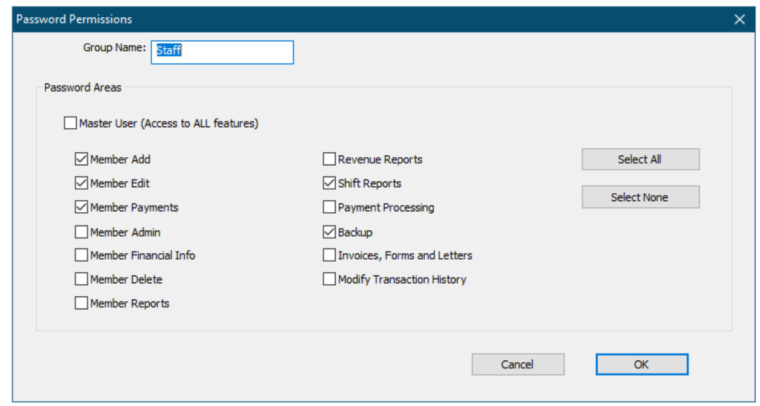
Remove the selected user or group.

Print List

Display a list of permissions for all users and groups.

Setting Permissions for a User or Group

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



Check the **Master User** box to allow access to all parts of the software.

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

Click **Select All** to select all areas, or click **Select None** to clear all areas.

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

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Networking / Data Path Settings 270

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Installing Gym Assistant on All Workstations 275

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 DOES NOT 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 Create a "New Data File." Select the Data folder you created in Step 1.
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.

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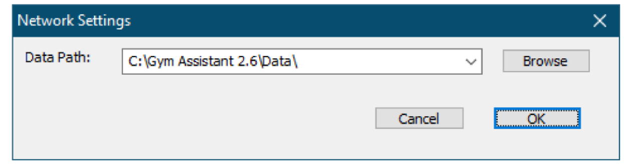
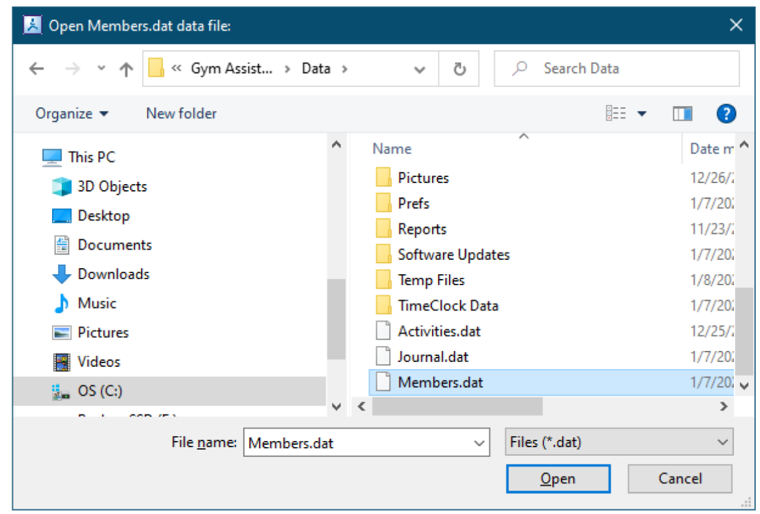
Networking Settings

Select **Networking / Data Path** from the **Settings** menu.

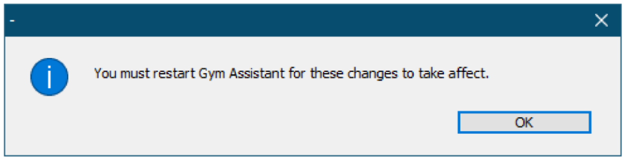


Enter a path to the Gym Assistant data file (Members.dat) or click **Browse** to navigate to an existing folder.

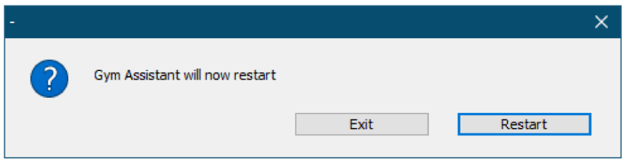


If you are creating a new data folder there is no Members.dat to select, so enter "members" into the **File name** and click **Open**.

Click **OK** to continue.



Click **OK**.



Click **Restart** or **Exit**.

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Sharing the Data Folder 271

Where to store the data?

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

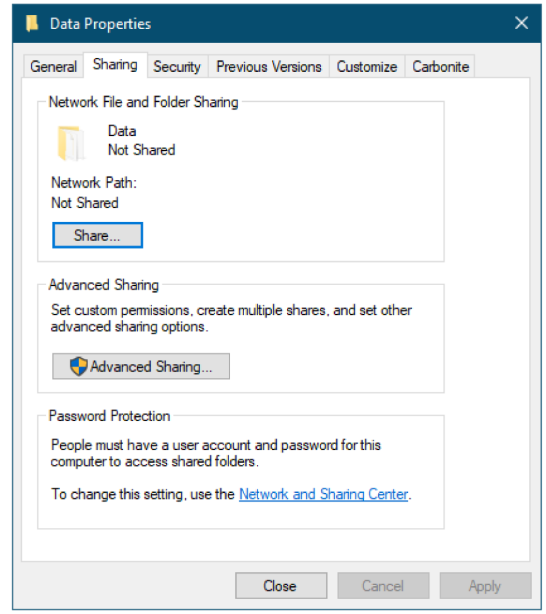
For most customers we recommend that the data reside on the **front-desk workstation** where the majority of Gym Assistant work is done (e.g. member check-in). This option allows your check-in computer to function normally if there is a problem with your network.

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.

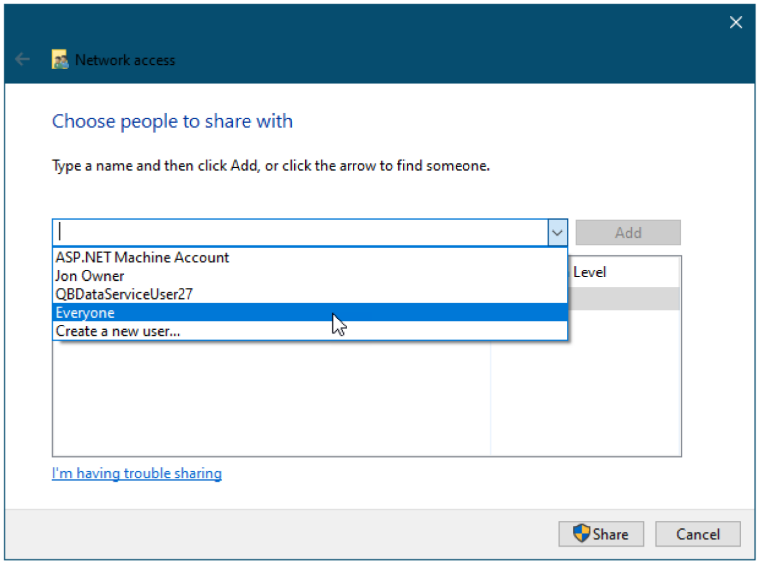
Sharing the Data Folder

The data folder must be accessible to all workstations that will be running Gym Assistant.

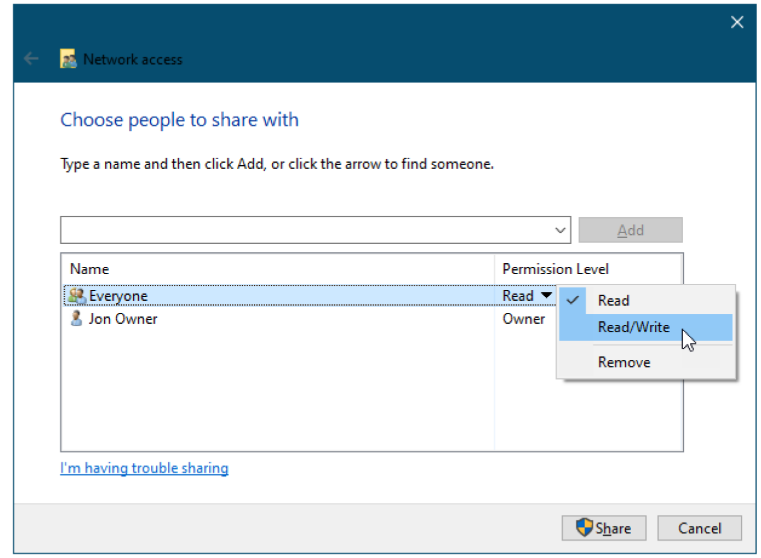
Right-click on the data folder and select Properties.



Click **Share**.

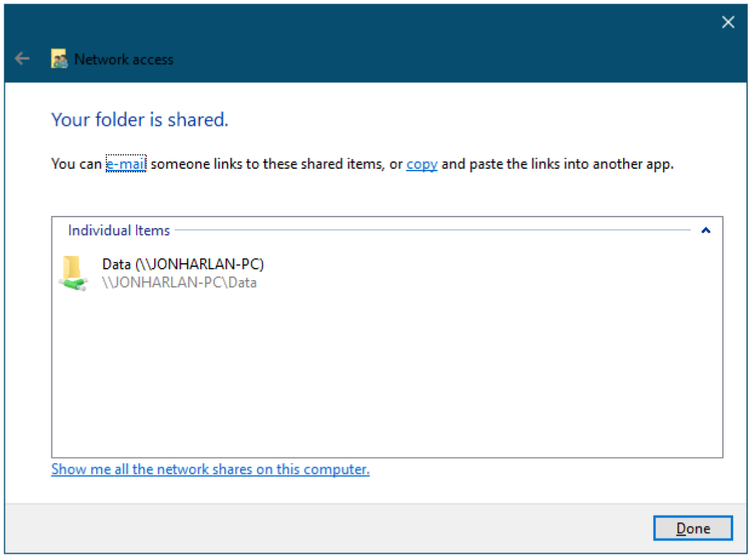


Click on the pulldown menu and select **Everyone**, then click **Add**.



Click on **Everyone**, then select **Read/Write**.

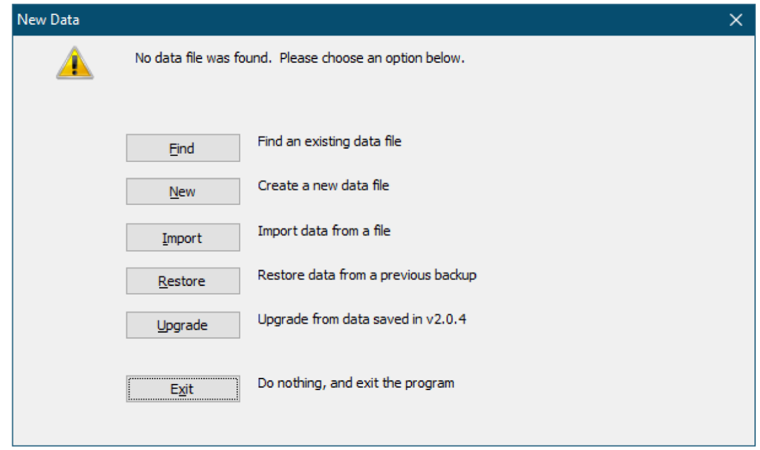
Click **Share**.



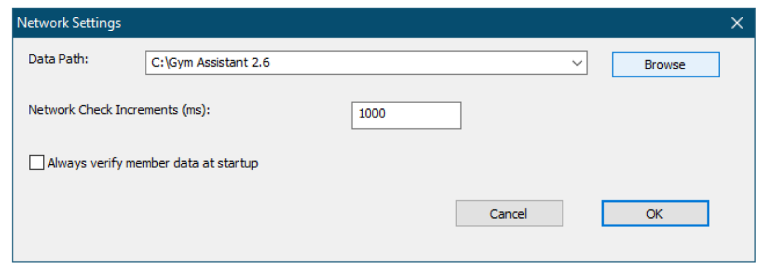
Installing Gym Assistant on All Workstations

Install Gym Assistant on each additional workstation.

After starting the software for the first time the New Data window will appear.



Click **Find** to set the data file to an existing location.



Click **Browse**.

Navigate to the existing shared folder on the network and open the Members.dat file.

Gym Assistant will now restart.

Confirm Networking Connections

You may need to check to see how many workstations are connected to the shared data folder.

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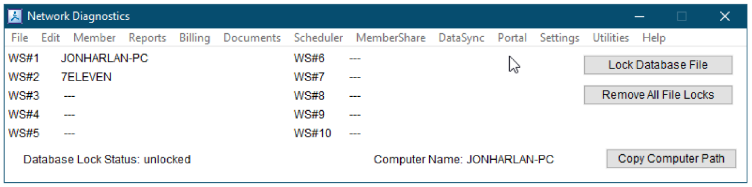
Select **Troubleshooting / Network Diagnostics** from the **Help** menu.



All of the currently connected workstations will be listed, and the list will update automatically as workstations connect and disconnect.

Note: The Workstation number (WS#) is dynamically assigned when a workstation connects to the data.

Copy Computer Path

Click to copy the path for this computer.

Lock Database File

Remove all File Locks

Only click these buttons if you are directed to do so by Gym Assistant Support.

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.

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

*Note: **GateKeeper** will also manage **Access Control** (entry through an electrically operated door). Please see documentation for Access Control for access control installation and instructions.*

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.

Your computer will most likely not include any built-in serial ports, so you will 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 at:

www.gymassistant.com/product/usb-serial-adapter/

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 User Guide for more information.

Connecting the Barcode Scanner

Code 950 Imager

Connect the plug of the power supply into the socket on the scanner cable.

Connect the power supply into an AC outlet.

Connect the power supply to the scanner cable. The scanner will beep once.

Wait a few seconds for the the scanner to beep, which indicates the scanner is ready.

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

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

Metrologic/Honeywell – Fusion Laser Scanner

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

Connect the power supply into an AC outlet.

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.

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.

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

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

> *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.*

ZBA Scanner – CCD Scanner

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

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

Connecting a Barcode Scanner 16

Connect the power supply into an AC outlet.

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

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.

The RED scan light should be on constantly.

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

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

IDTech Omni Slot Scanner

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

Connect the power supply into an AC outlet.

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

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

Quickly swipe a barcode through the scanner.

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.

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 not need the drivers with GateKeeper.

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

The blue light will not illuminate until you click the Find Reader button in GateKeeper Ports / Access Points setup.

GateKeeper Settings

Start **GateKeeper** by one of the following methods:

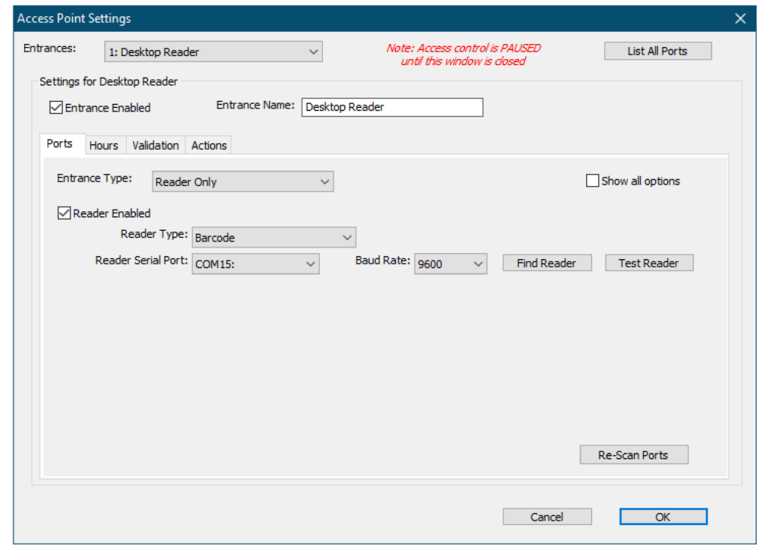
- In Gym Assistant, select **GateKeeper** from the **File** menu.
- In Gym Assistant, press the **F2** key on the keyboard.
- Select **GateKeeper** from the Start menu.

Please see the following topic:

Port Settings 284

Ports

Click the **Ports** tab.



Select from the **Entrances** list.

Check the **Entrance Enabled** box.

Set the **Entrance Name**, for example "Front-Desk", "Desktop Reader", "Door", etc.

Check the **Reader Enabled** checkbox.

Set the **Reader Type** to "Barcode" (or the correct reader type for your device).

Leave the **Reader Baud Rate** at 9600 (for almost all devices).

Click **Find Reader**, then scan a card.

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

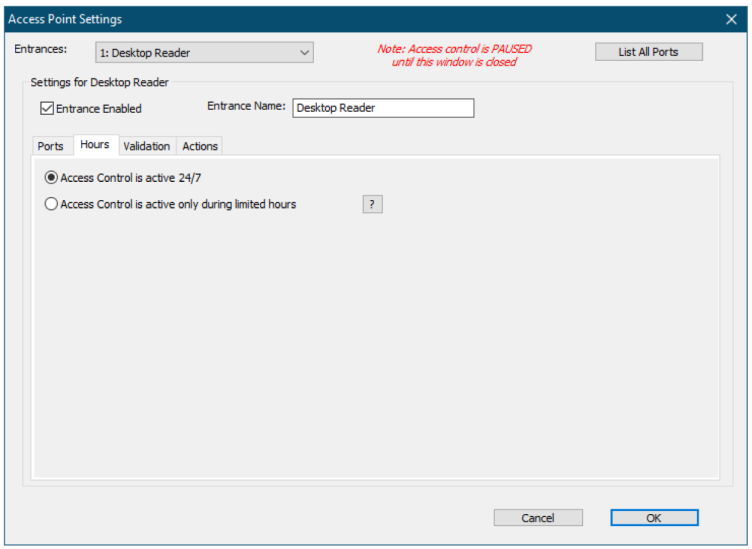
If the scanner is not found then click the **Cancel** button and refer to the “Serial Port Troubleshooting” document.

Hours

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

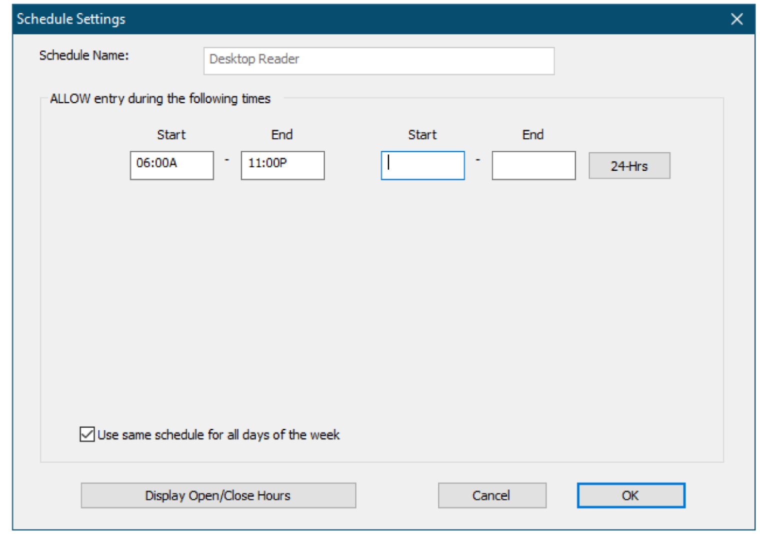
Note: In general, limiting active hours for an entrance will be used only when controlling access into your facility ("access control"). Note: When an access point is INACTIVE the scanner will still beep when it reads a barcode, but no member visit will be recorded.

Click the **Hours** tab.



Select **Access Control is active 24/7** to NOT limit hours on this entrance (allow 24/7 access).

Select **Access Control is active only during limited hours** to limit hours on this entrance.

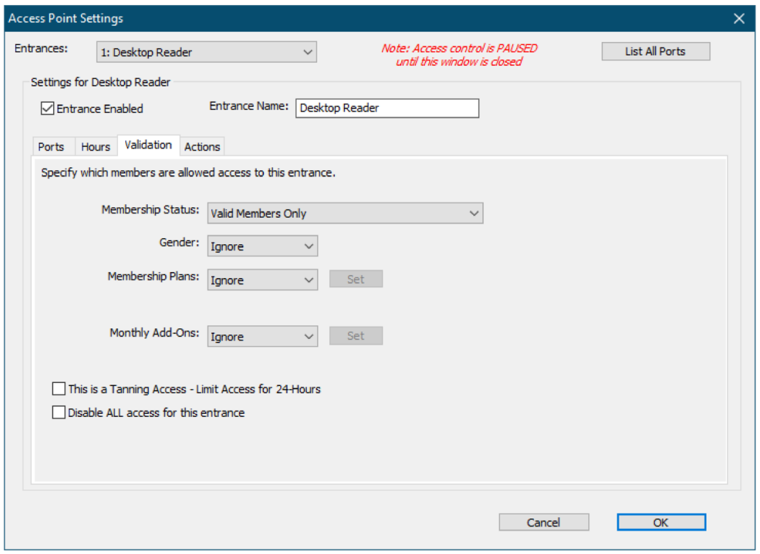


Note: The hours shown are the times when this entrance is ACTIVE. Outside of the active hours no members will be allowed entry.

See Editing a Daily Schedule 40 for more info about editing the schedule.

Validation

Validation lets you filter which members are allowed/denied access to an entrance.



Membership Status

Valid Members Only - Only members who are up-to-date with **Billing Status** of "Active" are allowed entry.

Ignore - Membership Status is not used to determine entry. (Inactive and delinquent members can be allowed entry.)

Gender

Ignore - Gender is not used to determine entry.

Male / Female - Only members of the specified gender are allowed entry.

Membership Plans

Ignore - Membership Type is not used to determine entry.

Selected - Only members with the selected membership types are allowed entry. Click Set to select the allowed membership types.

Monthly Add-Ons

Ignore - Monthly Add-Ons are not used to determine entry.

Selected - Only members with the selected Monthly Add-Ons are allowed entry. Click Set to select the allowed Monthly Add-Ons.

This is a Tanning Access

Check this box to limit entry to once every 24-hours. You must also check Record Tan Session in the Actions tab to record when a member last tanned.

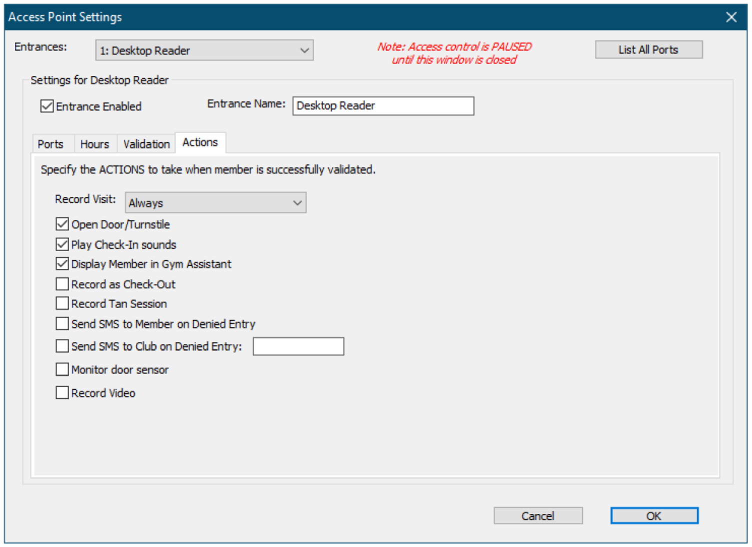
Disable All access for this entrance

Check this box to turn off all access for this entrance. Denied visits will be recorded, however, so you will know who tried to gain entry.

This setting might be used if an area of the facility is temporarily unavailable, e.g. under construction or otherwise out-of-service.

Actions

The Actions tab determines what actions will occur when a member scans at that entrance.



Record Visit

Always - Always record a visit when member scans.

Never - Never record a visit when member scans.

Only for 1st Daily Visit - Only record a visit the first time that a member scans in a calendar day. This option will prevent multiple daily visits in the Visits log.

Play Check-In Sounds

Leave this box checked to play "ping" and "buzz" sounds when member scans.

Display Member in Gym Assistant

Leave this box checked to display the member record in Gym Assistant when a member scans.

Record as Check-Out

Check this box to indicate that this reader is for check-out (exit). Check-outs will be displayed and counted different in the Visits log.

Record Tan Session

Check this box to indicate that this entrance controls access to a tanning bed or area. The member's Last Tan field will be set to the time/date of the scan. You must check the **This is a Tanning Access** box in the Validation 287 tab to limit access to this entrance to once every 24-hours.

Send SMS to Member on Denied Entry

Check this box to automatically send and SMS to the member when denied entry. The message will include the reason for the denied entry.

Send SMS to Club on Denied Entry

Check this box to automatically send and SMS to the club if a member is denied entry. The message will include the reason for the denied entry and the member's mobile phone.

Monitor Door Sensor

Check this box if you are controlling access through a door and need GateKeeper to be aware of when the door is opened.

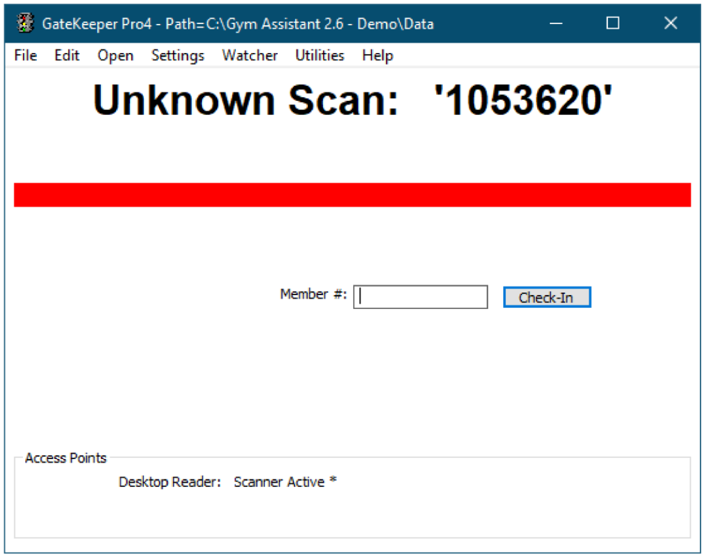
Record Video

Check this box to record video activity when a member scans (called "DoorWatcher"). See the GateKeeper documentation DoorWatcher setup.

Testing the Barcode Scanner

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

If the message “Unknown Scan: ‘XYZ’” should appear, it indicates that GateKeeper has detected the card scan but cannot identify the member attached to that barcode number.



If either "Unknown Scan: 'XXXX'" or a member record shows up after the scan, your scanner is setup and working properly.

If GateKeeper is not seeing your card scans please refer to the Troubleshooting section of the GateKeeper documentation.

Troubleshooting

Please consider the following:

- There are many 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 assume 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 looking at port settings if the scanner isn't powered up or if the scanner does not beep when a barcode is read.

Connecting a Barcode Scanner 16

For more information, please refer to **Barcode Reader / Serial Ports** documentation at:

https://www.gymassistant.com/support/technical-documents/

Does the scanner have power?

Check to see if the scanner has power.

- The scanner should beep when it is powered up.
- The light on top of the 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?

Scan a card. Does the reader beep?

- 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.

Code Barcode Imager

- Please refer to Code Barcode Image

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.

ID-Tech Slot Barcode Scanner

- Try turning the card around so the barcode faces in the other direction.

Connecting a Barcode Scanner 16

- 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.

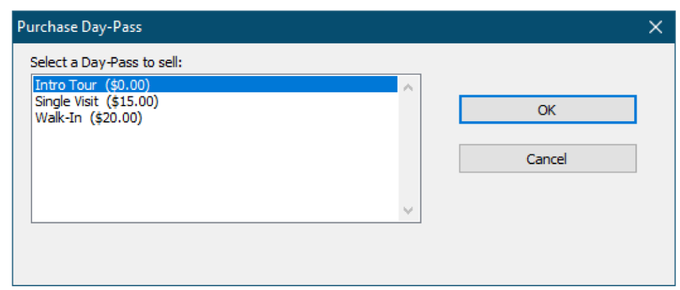
The **Utilities** menu includes features that are not easily categorized in other parts of the program.

Utilities 17

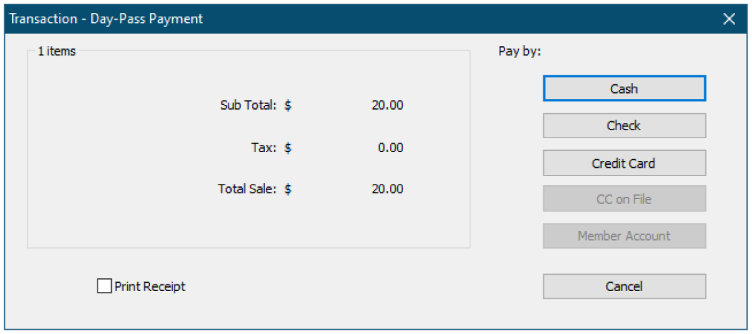
Sell Day-Pass to Non-Member

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.

Select **Sell Day-Pass to Non-Member** from the **Utilities** menu.



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:

- View a Journal Detail report:
    - Click **Journal History** while viewing a member record, or
    - Select **Journal Detail** from the **Reports** menu to view a list of all transactions
- 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.

Note: 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 61 for more information about setting up your cash drawer.

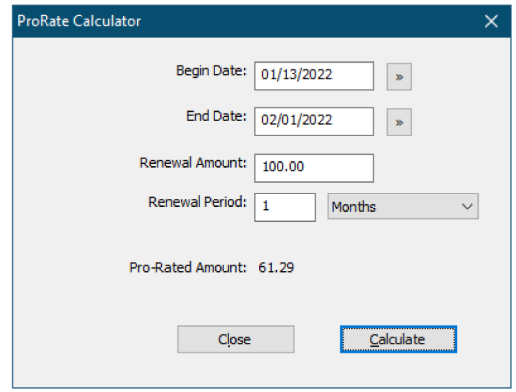
Check-In Family Members

See Checking In Family Members 108.

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.

Select **Pro-Rate Calculator** from the **Utilities** menu.



Enter the **Begin Date** and **End Date** for the time to be billed.

Enter the **Renewal Amount**, which is the standard amount due for a full billing period (e.g. the monthly or annual payment).

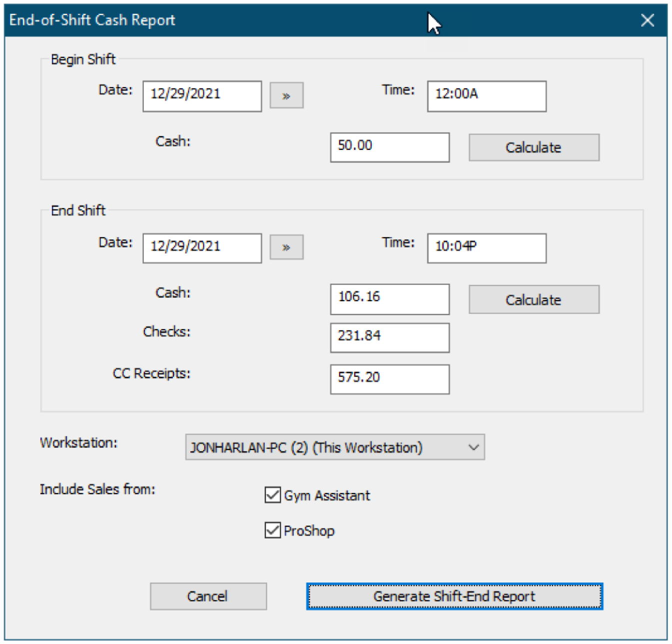
Enter the **Renewal Period**, which is the standard billing period length (e.g. 1-month or 6-months).

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.

Select **End-of-Shift Z-Report** from the **Utilities** menu.



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 below.)

End Shift Total

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**.

Check the **Gym Assistant** and/or **ProShop** boxes to include sales from each program in the report.

Click **Generate Shift-End Report**.

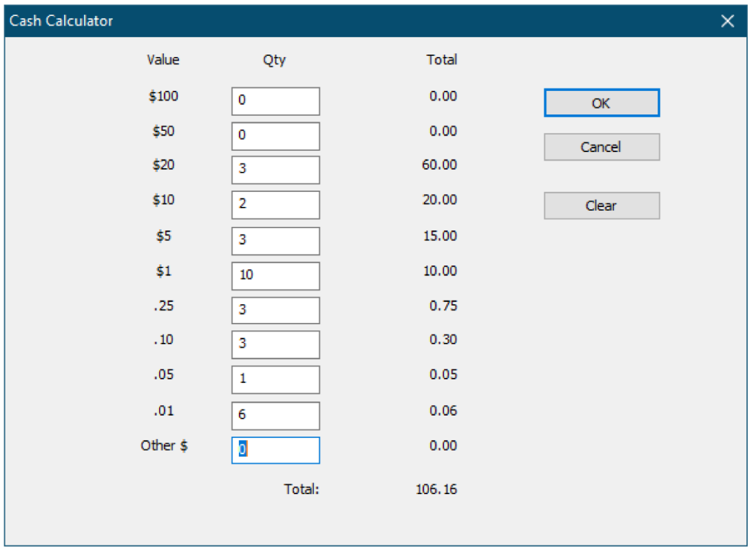
Gym Assistant will report whether the Z-Report is balanced and then display the End-of-Shift Z-Report.

```
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

The **Cash Calculator** window will appear.



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.

```
Mem #  Name                                    Minutes
------------------------------------------------------
    2  Cate McKerlie                                 8
  261  Jill Patterson                              116
  612  Cat Patterson                                 8

3 members currently On-Site
```


If members do no check-out, then the **Who's Here?** report will assume that a member is still on-site until the

View Backup Status

Select View Backup Status from the Utilities menu.

```
Last backup to disk:
12/24/2021 (8 days ago)

Last online backup:
12/29/2021 (3 days ago)
File Size:  2,887 KB
```

BackOffice

To launch and show the **BackOffice** application, select **BackOffice** from the **Utilities** menu.

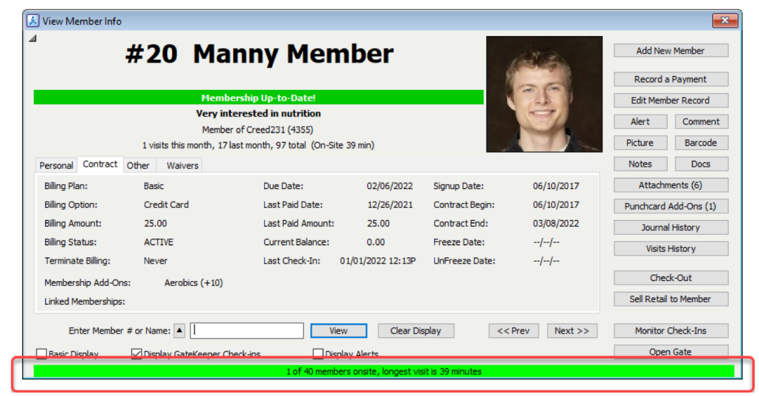
BackOffice Functions 69

Occupancy Monitor

Occupancy Monitor helps you to monitor and control the number of members on-site in your facility.

If needed, you can specify the maximum occupancy level, and Gym Assistant will automatically deny entry to more members until some members have left.

If you enable Occupancy Monitoring, the Occupancy Level will appear at the bottom of the View Member Info window (below).

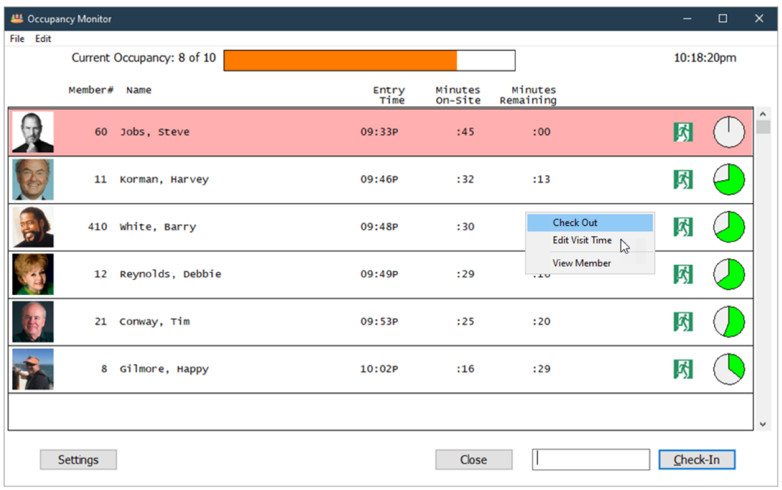


The Occupancy Level indicator shows orange at 80% and red at 90% of maximum.

Occupancy Monitor Window

To open the Occupancy Monitor window:

- Click on the Occupancy Monitor bar at the bottom of the View Member Info window.
- Select **Occupancy Monitor** from the **Utilities** menu, or
- Press the **F7** key on your keyboard.



The **Current Occupancy** level shows at the top of the window.

For every member on-site the following information is displayed:

- Entry Time
- Minutes On-Site

- Minutes Remaining

The time-remaining indicator shows how much of allotted time has been spent on-site.

Right-click on a member for the following actions:

- Check-Out
- Edit Visit Time (change the time the member entered)
- View Member Record

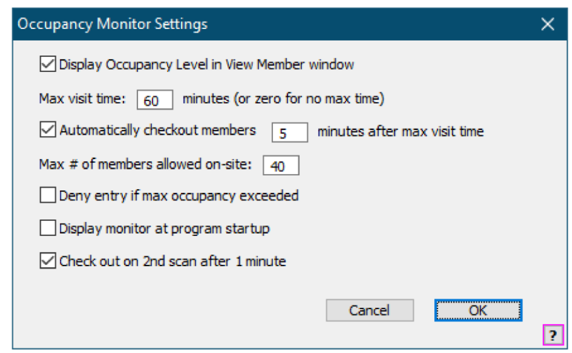
To record a member entry, enter a membership number or part of the member's name and click **Check-In** (or press the ENTER key).

Occupancy Monitor Settings 302

Occupancy Monitor Settings

Occupancy Monitor Settings

In the Occupancy Monitor window click **Settings**.



Display Occupancy Level in View Member window

Check this box to display the Occupancy Level bar at the bottom of the View Member window.

Max Visit Time

The maximum length of a standard visit. Enter zero for no max time.

Automatically Checkout Members

Check this box to automatically checkout members after the allowed time.

Max # of Members Allowed On-site

Specify the maximum occupancy level for your facility.

Deny Entry if max occupancy exceeded

Check this box to have GateKeeper deny entry if the maximum occupancy level is exceeded.

Display Monitor at program startup

Check this box to automatically display the Occupancy Monitor window at program startup.

Checkout on 2nd Scan after 1 minute

Check this box to automatically checkout members if they scan a barcode while they are on-site. This allows you to use the same reader for both check-in and check-out.

Occupancy Monitor 300

DoorWatcher Event Monitor

Enter topic text here.

Contact Tracing

Enter topic text here.

SmartReader Access

How the SmartReader works with Gym Assistant

The SmartReader basically works the same as a barcode or proximity reader. It is simply another way for Gym Assistant to identify a member.

The SmartReader system assigns a unique 8-digit number (a "SmartKey") for each member phone. That SmartKey number then becomes the barcode for the member.

- The member installs the VIZPin Smart app on his phone.

- Within the VIZPin Smart app, the member registers his mobile number and email, then Requests Access to your facility (by entering in your Location ID, see below).
- Gym Assistant tells the the VIZPin server to "Grant Access" to the member, which tells the reader to recognize his phone.
- Gym Assistant gets the VIZPin SmartKey number assigned to the member's phone.
- The member's SmartKey number is set as that member's Gym Assistant barcode.

SmartReader Settings 304

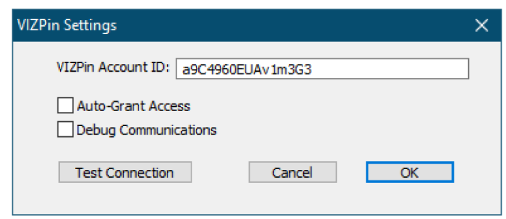
Manage VIZPin Users 305

Install the VIZPin Smart App 307

SmartReader Settings

In Gym Assistant, select **SmartReader Access** from the **Utilities** menu.

If this is the first time that select this feature then you will need to enter your VIZPin Account ID, which you should get from Gym Assistant.



Enter the **VIZPin Account ID** that you receive from Gym Assistant.

Click **Test Connection** to confirm that you have the Account ID correct.

Check **Auto-Grant Access** to have Gym Assistant automatically check for members who have registered a VIZPin account and import those members' SmartKey numbers.

Check **Debug Communications** only if requested by Gym Assistant Support.

[Manage VIZPin Users](305)

[Install the VIZPin Smart App](307)

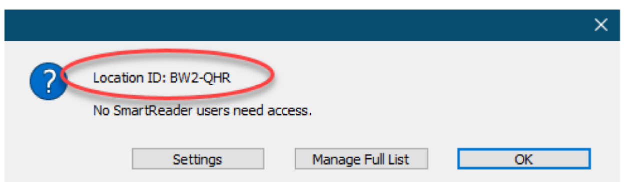
Manage VIZPin Users

Connect to the VizPin Server

In Gym Assistant, select **SmartReader Access** from the **Utilities** menu.

Note: If this is the first time that select this feature then you will need to enter your VIZPin Account ID in VIZPin Settings. Please contact Gym Assistant Support for your Account ID. (See [SmartReader Settings](304))

For any members who have registered in the VIZPin app and requested access to your facility, they will automatically be granted VIZPin access (so the reader will recognize their phone) and their VIZPin number will be imported as a new barcode number.



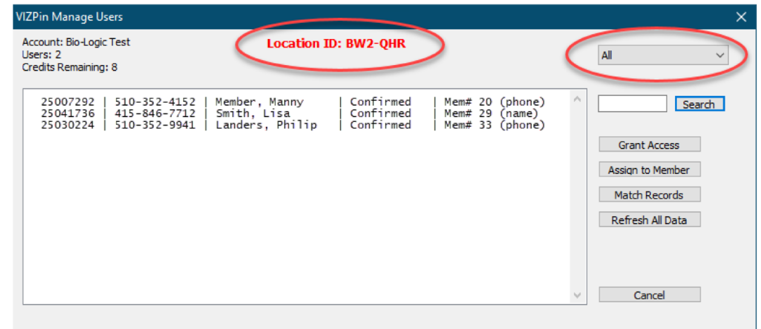
Your **Location ID** will be displayed along with a list of any member SmartKeys that were imported.

In most cases you can just click **OK**, and no further action is necessary.

To review all SmartKeys for your VIZPin account, click **Manage Full List**.

Managing All VIZPin Users

The VIZPin Manager Users window is where you manage your SmartReader members.



Your **Location ID** is displayed at the top.

The field listed are:

- SmartKey number
- Mobile Phone
- Name
- SmartKey status (Confirmed or Needs Access)
- Member number
- Type of member match (phone, name or none)

Select a filter:

- **All**
- **Needs Access**: Show only those VIZPin users who have not been granted access, and so are not yet recognized by the reader
- **Unmatched to Member**: Show only those VIZPin users who have not been matched with a member record

To search for a member, enter the member's mobile number or partial name and click **Search**.

Click **Grant Access** to grant VIZPin access for the selected user (click only for an unconfirmed user).

Click **Assign to Member** to assign the selected user to a member record.

Install the VIZPin Smart App

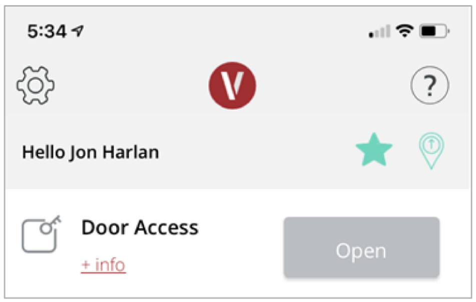
Install and Register the Smart Phone App

Have your member install the **VizPin Smart** app on their iPhone or Android phone.

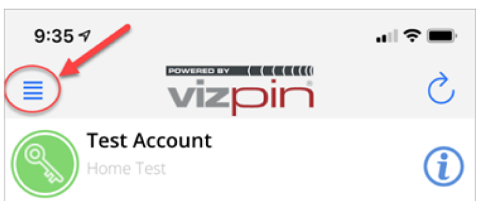
Register the app.

The app will send the member a confirmation code by SMS.

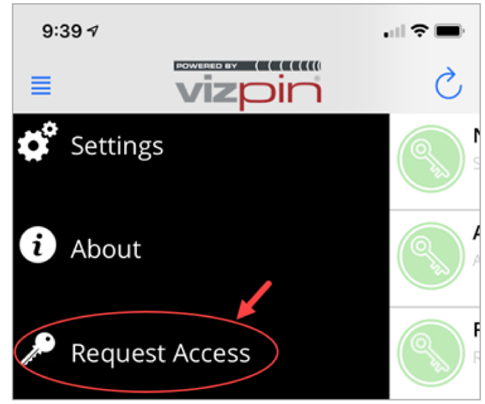
Enter that code into the app to complete the registration.



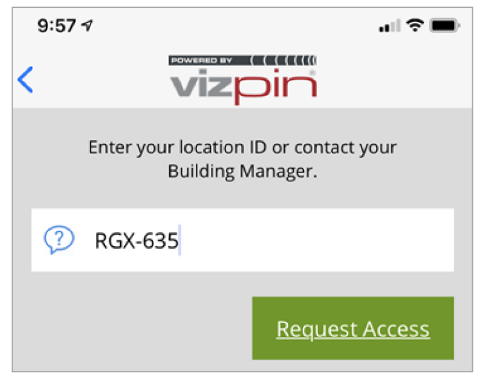
In the VizPin Smart have the member will need tap on the menu icon (in the upper-left).



Then tap **Request Access**.



Then enter your **Location ID** (from VizPin website, below) and tap **Request Access**.



Troubleshooting

You will find some excellent troubleshooting videos specifically for Android and iPhone at:

https://vizpin.com/tech-tip-videos/

Utilities

17

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.

Monitoring Member Occupancy Level

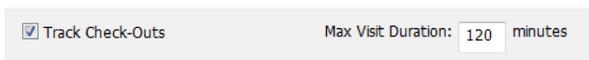
Gym Assistant can track how many members are on-site at any time.

******* *THIS SECTION NEEDS TO BE COMPLETED* *******

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.

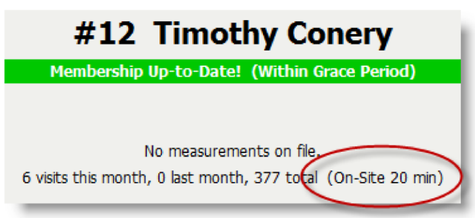
To enable tracking of member check-outs select **Program Options** from the **Settings** menu.



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:



The member 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.