



User's Guide

Version 1.5
December 2008

Table of Contents

TABLE OF CONTENTS	2
INTRODUCTION	4
SYSTEM REQUIREMENTS	4
CONTACTING BIO-LOGIC	4
INSTALLING THE SOFTWARE	5
STARTING GYM ASSISTANT FOR THE FIRST TIME	6
ENTERING BUSINESS INFORMATION	8
ENTERING MEMBERSHIP TYPES	9
ENTERING CREDIT CARD SETUP INFO	11
ADDING NEW MEMBERS	12
NEW MEMBER: PERSONAL INFORMATION	12
NEW MEMBER: MEMBERSHIP INFORMATION.....	13
NEW MEMBER: CREDIT CARD INFORMATION.....	13
NEW MEMBER: BANK DEBIT INFORMATION.....	14
NEW MEMBER: OTHER INFO.....	15
NEW MEMBER: EDIT INFORMATION	16
CHECKING-IN AND DISPLAYING MEMBER INFORMATION	17
CHECK-IN WINDOW CONTROLS	18
MODIFYING MEMBER INFORMATION	20
RECORDING A MEMBER PAYMENT	20
ATTACHING AN ALERT TO A MEMBER'S RECORD	21
ATTACHING A NOTE TO A MEMBER'S RECORD.....	21
CAPTURING A MEMBER'S PICTURE.....	22
CHANGING A MEMBER'S BARCODE.....	24
VIEWING A MEMBER'S ACCOUNT HISTORY	24
VIEWING A MEMBER'S ATTENDANCE HISTORY	24
REPORTS	25
GENERIC REPORT - MEMBERSHIP LIST	25
MEMBERSHIP SUMMARY	26
REVENUE PROJECTION.....	26
VISITS DETAIL	26
JOURNAL SUMMARY.....	26
JOURNAL DETAIL.....	27
BILLING	29
EFTS AND PAPER DRAFTS EXPLAINED	29
BANK ACCT ELECTRONIC FUNDS TRANSFERS (EFTS) EXPLAINED.....	30
INTRODUCTION	30
SETTING UP MEMBERSHIP TYPES FOR BANK DEBIT	31

ADDING A NEW DEBIT MEMBER.....	33
CHANGING EXISTING MEMBER RENEWAL TYPE AND DEBIT INFO	33
SETTING UP YOUR BANK DEBIT PROCESSING INFO.....	34
PROCESSING THE BANK DEBITS.....	37
SUBMITTING THE EFT DATA	39
PROCESSING CREDIT CARDS.....	40
RECORDING MONTHLY CREDIT CARD PAYMENTS	41
CREDIT CARDS – DISPLAYING EXPIRED CARDS	41
BANK DEBITS – PRINT DRAFT DEPOSIT SLIP (DRAFTS ONLY)	41
BANK DEBITS – PRINT DRAFT RE-DO ORDER (DRAFTS ONLY)	42
SETTINGS.....	43
PREFERENCES	43
BUSINESS INFO	45
MEMBERSHIP TYPES.....	46
REPORTS.....	48
FIELD NAMES	49
INVOICES	49
MAILING LABELS	49
PASSWORDS.....	50
LOCALE	51
CREDIT CARDS	51
BANK DEBITS	52
PHOTO CAPTURE	53
BACKUP.....	53
WORKSTATION ID	53
UTILITIES.....	55
PRINT FORMS FOR MEMBERS.....	55
PRINT LETTERS FOR MEMBERS.....	55
EDIT FORM TEMPLATE	56
EDIT LETTER TEMPLATE.....	57
PRINT MAILING LABELS	58
BACKUP TO DISK.....	59
RESTORE FROM BACKUP.....	60
PURGE OLD JOURNAL ENTRIES.....	61
EXPORT MEMBER DATA	62
IMPORT MEMBER DATA	62
EXPORT JOURNAL.....	62
IMPORT JOURNAL	62
EXPORT MEMBERSHIP LIST	63
DATABASE DIAGNOSTICS	63
SPECIAL TOPICS.....	64
CONNECTING A BARCODE READER	64
CONTROLLING A TURNSTILE	64
BACKING UP YOUR DATA	64
<i>Why Backup?</i>	64
<i>Creating a backup system day-to-day</i>	64
<i>Archiving Your Data</i>	65

Introduction

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

This guide describes how to get started with Gym Assistant.

Important: These instructions assume that you're familiar with standard mouse techniques such as clicking and dragging and manipulating basic window controls (menus, buttons, etc.). If you need more information about basic computer operations, please see the documentation that came with your computer.

System Requirements

Windows 98/NT/2000/XP
64 MB RAM required, 128 MB recommended
20 MB hard disk space available
Pentium 200 MHz recommended

Contacting Bio-Logic

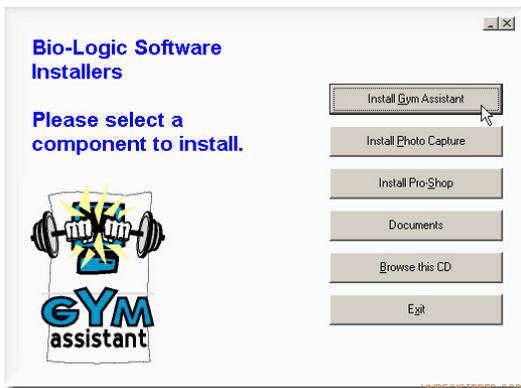
Bio-Logic, Inc.
1150 Ballena Blvd, Ste 253
Alameda, CA 94501

Phone: 510-865-1815
Toll-Free 1-877-496-2778 (877-GYM-ASST)
Email: info@gymassistant.com
Web: <http://www.gymassistant.com>

Installing the Software

Insert the Gym Assistant Installation CD into your computer. The Bio-Logic Software Installers window below should appear within about 10 seconds. If the Installer window does not appear within about 10 seconds, then:

- Open My Computer.
- Right-click on the CD drive, which should be called "Bio-Logic".
- Select AutoPlay from the menu that appears.



Click the Install Gym Assistant button. The Gym Assistant Setup window below appears:



Click the Next button in each window that appears to complete the installation.

After the installation is complete, click the Finish button.

The Bio-Logic Software Installers now appears again. If you purchased the PhotoCapture add-on or ProShop software, then install each additional product now.

Click the Exit button to close the Bio-Logic Software Installers window, and then eject the installer disk from your CD drive.

Starting Gym Assistant for the first time

In Windows 98 or Windows 2000:

- Click the Start button.
- Select Gym Assistant 1.5 from the Start menu.

In Windows XP:

- Click the Start button.
- Select All Programs
- Select Gym Assistant 1.5 from the top of the All Programs menu.

The first time you run Gym Assistant (and each time until you register the software), the Software Registration window will appear.



You should have received Registration Information from Bio-Logic (on a cover letter or by email).

- If you have the registration info on-hand, then click Register to enter the info now (see below).
- If you click Later, then you can enter the reg info the next time you start Gym Assistant. You will only be able to enter 20 member records until you enter a valid registration code.

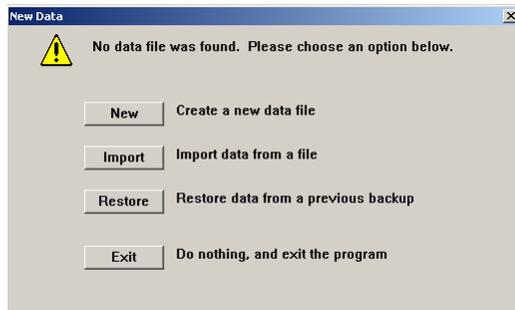


Enter the User Name and Registration Code that you received from Bio-Logic, then click OK. Be sure to type the User Name exactly as it appears on your information sheet, including spaces and punctuation.

The Registration Info window below then appears displaying your information.



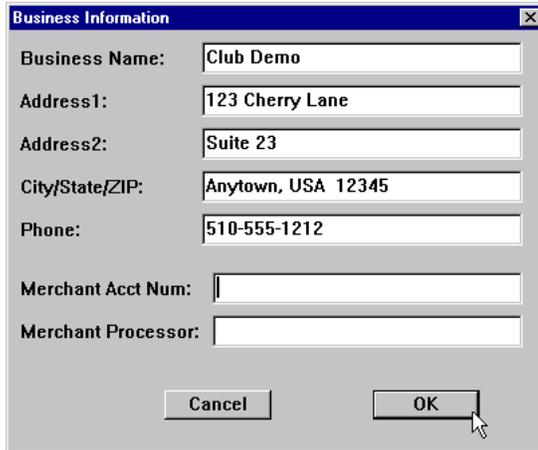
The New Data window will appear.



- Click the New button to create a new empty data file.
- The message “Please restart Gym Assistant after clicking OK” will appear.
- Click OK.
- Restart Gym Assistant as by clicking on the Start menu as you did before.

Entering Business Information

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



The screenshot shows a dialog box titled "Business Information" with a close button (X) in the top right corner. The dialog contains several text input fields with the following labels and values:

Business Name:	Club Demo
Address1:	123 Cherry Lane
Address2:	Suite 23
City/State/ZIP:	Anytown, USA 12345
Phone:	510-555-1212
Merchant Acct Num:	
Merchant Processor:	

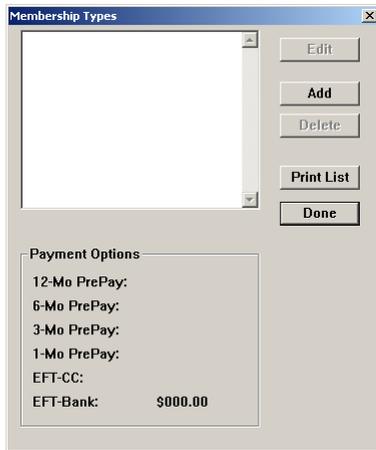
At the bottom of the dialog, there are two buttons: "Cancel" and "OK". A mouse cursor is pointing at the "OK" button.

Press the TAB key to move to the next field. Merchant Acct Num and Merchant Processor fields are optional. When you are finished entering your information, press the ENTER key (or click the OK button) to continue.

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

Entering Membership Types

The Membership Types window appears for you to enter the different membership types that you offer.



The list of membership types defines your club's "price list" with different membership options. Each membership type includes the following fields:

- Name of the membership (for example "Standard", "Student" or "Senior")
- Initiation Fee (extra charge at signup in addition to first payment)
- Contract length (in months)
- Hours of entry (ALL or off-peak only)
- Payment Options (How often members make payments)

You can modify your Membership Types later at any time by selecting Membership Types from the Settings menu.

Click the Add button to add a new membership type. The Edit Membership Type window below will appear:

Type in a Name for the new membership type, then press the TAB key three times to move to the Initiation Fee field. Enter the initiation fee in dollars. This amount will be added to the first payment when the member first signs up.

Press the TAB key, and then enter the contract length. If you do not require a contract, then enter zero.

Enter the renewal fee for each Payment Option that you offer for this membership type. The different Payment Options are as follows:

12-Month PrePay:	Member pays every 12 months
6-Month PrePay:	Member pays every 6 months
3-Month PrePay:	Member pays every 3 months
1-Month PrePay:	Member pays monthly by cash, check or charge
EFT-CC:	Fees are charged monthly from a credit card
EFT-Bank:	Fees are charged monthly from a checking or savings account

A membership can have one or more payment options. In the “Student” membership type shown above, members have the following payment options:

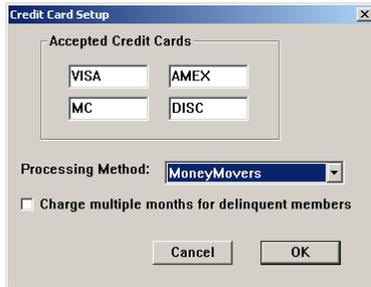
12-Month PrePay:	Member pays \$315 for a full year
1-Month PrePay:	Member pays \$30 monthly by cash, check or charge
EFT-CC:	\$29 charged monthly from a credit card
EFT-Bank:	\$29 charged monthly from a checking or savings account

When you are finished editing the membership type, press the ENTER key (or click the OK button).

The new membership type will then appear in the Membership Types window. Add as many membership types as you need in the Membership Types window, then click Done to close the window.

Entering Credit Card Setup Info

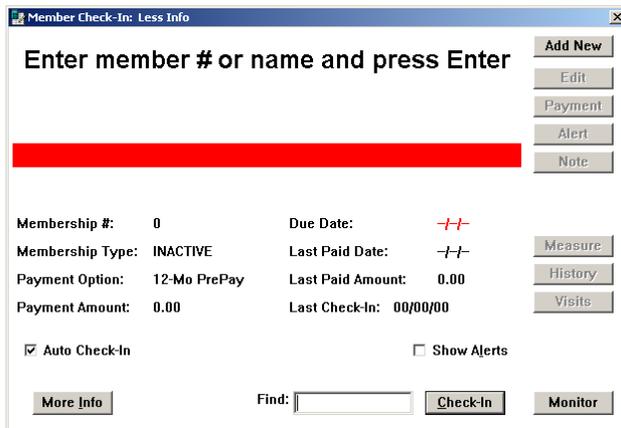
The first time you start the program, the Credit Card Setup window below appears next.



You can modify your Membership Types later at any time by selecting Membership Types from the Settings menu.

- Enter the credit-card types that you plan to accept (or delete any types that you do not accept).
Only four types can be defined, but any type of credit card can be used in Gym Assistant. The card types that you list are merely labels to show your front-desk employees what cards are accepted. If you accept more than 4 types, then you should label the last card type as “other”.
- Select a Processing Method to indicate the method by which you will be processing your EFTs.
- Check the “Charge multiple months for delinquent members” box only if you want to debit members for past due balances. We recommend not checking this box initially.
- Click OK to close the window.

- The Member Check-In window below then appears.



Congratulations! You are ready to begin entering member records.

Adding New Members

Click on the Add New button in the Check-In/Browse window.

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

A dialog box with a blue title bar and a close button (X) in the top right corner. The text inside reads "Membership # of new member:". Below this is a text input field containing the number "1". At the bottom of the dialog are two buttons: "Cancel" on the left and "OK" on the right.

- Click OK to accept this value or enter another membership number.

All membership numbers must be unique. In addition, membership numbers from deleted memberships should not be reused for new members.

*The Registration Code that you entered for Gym Assistant enables the software for a certain number of membership records. Note that this limit is on the **number of records**, and not the **membership numbers** themselves. With any edition of Gym Assistant you can have membership numbers from 1-32,000.*

New Member: Personal Information

The New Member: Personal Info window will appear:

A window titled "New Member: Personal Info" with a close button (X) in the top right corner. It contains several input fields:

- First: Manny
- Last: Member
- Address1: 123 Cherry Lane
- Address2: (empty)
- City/State/ZIP: Anytown, USA 12345 (dropdown menu)
- Phone: 415-555-1212
- Birth Date: 09/15/62
- Sex: M
- Emergency Info: Manny Member, spouse, 415-333-2222

 At the bottom are two buttons: "Cancel" and "Next >>".

Only the Last and First name fields are required, although we recommend that you fill in all fields before continuing.

Gym Assistant will automatically capitalize the first letter of each word for you in the Name and Address fields.

- Press the ENTER key or click the Next button to continue.

New Member: Membership Information

The New Member: Membership Info window below appears next.

- Select a Membership Type (e.g. "Student") from the Membership Type pull down menu.
- Select a Payment Type (e.g. "1-Mo PrePay") from the Payment Type pull down menu. Notice that the Payment Option field automatically fills with the correct value for the selected Membership Type and Payment Option you selected.
- Specify the due date of the first payment by clicking on the small arrow to the right of the First Payment Due field or typing in a new date.
- *The options available in the First Payment Due field will vary according to the Payment Type selected.*
- Specify the contract length by selecting a value from the Contract Expires pull down menu or entering in a new value.
- Specify the beginning day for the contract (usually "Today").
- Specify the Payment Method at Signup, which is the way in which the member is paying today.
- Press the ENTER key or click the Next button to continue.

If you selected either EFT-CC or EFT-Bank for the Payment Option, then one of the following screens appears next.

New Member: Credit Card Information

If you selected the Credit-Card payment option, then the Credit-Card Debit Info screen below appears next.

Enter the cardholder name, card type (VISA, MC, AMEX, Discover), and card number and expiration date.

Press the ENTER key or click Next to continue. Gym Assistant will ask if you want to print a Credit Card Authorization form for this member.

New Member: Bank Debit Information

If you had selected the Bank Debit payment option for this member, then the Bank Debit Info screen below appears.

If you submit your bank debit to the bank as an Electronic Funds Transfer (EFT) file, then only the Account Name, Routing # and Account # fields are required.

Press the ENTER key or click Next to continue. Gym Assistant will ask if you want to print Bank Debit Authorization forms for this member.



The only authorization that is required is the Gym Form. Check the items that you want to print and press ENTER (or click the Print) button to continue.

New Member: Other Info

The Member Info – Other window appears.



The generic fields (Field 1, Field 2, etc.) allow you to store any kind of information for each member. These fields can be named at any time by selecting Field Names from the Settings menu.

Click Next to continue.

New Member: Edit Information

The Edit Membership Info window below will appear showing all the information that you have entered.

- Review the information, then click the OK button or press RETURN or ENTER to continue.
- If you need to edit the grayed-out (disabled) items, then click the Admin button to enable them.

The new member's record is displayed in the Member Check-In window.

Checking-In and Displaying Member Information

The Member Check-In window (below) shows a member's information. The Member's number, name and picture (if available) appear at the top of the window.



FIGURE 1 MEMBER CHECK-IN, DISPLAYING STANDARD INFO

To display a member's information, just enter their membership number in the "Find:" box and click the Find button (or press the ENTER key). The member's information will appear.

If the member is paid and up-to-date, then member status area appears in GREEN and the Entry Allowed sound plays. If the member is delinquent or inactive then this area appears in RED and the Entry Denied sound plays.

If the "Auto Check-In" checkbox is checked, then the window background is YELLOW and Gym Assistant will record a visit for each member who is displayed. If the "Auto Check-In" checkbox is unchecked, then the window background is GREY (see below) and Gym Assistant will **not** record a visit for any member who is displayed. (See below.)



Check-In Window Controls

The following controls appear in the Check-In window:

<p>Find: <input type="text"/></p>	<p>Enter Membership Number here to display a member's info. You can also enter the first few characters of the member's first or last name to lookup a member, or swipe their membership card if you are using a barcode reader.</p>
<p><input type="button" value="View"/> or <input type="button" value="Check-In"/></p>	<p>Displays the member info for the member number (or name) that you entered in the Find: text box. You can also press the ENTER key to find the member.</p> <p>This button appears as "View" if you are in Browse mode (Auto Check-In is turned OFF).</p> <p>This button appears as "Check-In" if you are in Check-In mode (Auto Check-In is turned ON).</p>
<p><input type="button" value="Monitor"/></p>	<p>Displays the Check-In Monitor window, which will show a list of the last 50 members who were checked-in.</p>
<p><input type="button" value="More Info"/> or <input type="button" value="Less Info"/></p>	<p>Displays More Info or Less Info in the Check-In window.</p>
<p><input checked="" type="checkbox"/> Auto Check-In</p>	<p>If this box is checked, then the window background is YELLOW and Gym Assistant will record a visit for each member who is displayed. If this box is unchecked, then the window background is GREY and Gym Assistant will not record a visit for any member who is displayed.</p> <p><i>Uncheck this box if you just want to view membership info without recording member visits.</i></p>
<p><input type="checkbox"/> Show Alerts</p>	<p>If this box is unchecked, then no alerts will be displayed for member. An alert is normally displayed if you have previously attached an alert to the member's record or if the member's credit card is expired.</p>
<p><input type="button" value="Add New"/></p>	<p>Add a new member.</p>
<p><input type="button" value="Edit"/></p>	<p>Edit the member's information. In most cases, you should modify member info by using the other functions such as Payment instead of Edit.</p>
<p><input type="button" value="Payment"/></p>	<p>Record a payment for the member</p>
<p><input type="button" value="Alert"/></p>	<p>Add or change the alert attached to a member's record.</p>
<p><input type="button" value="Note"/></p>	<p>Add or change the note attached to a member's record.</p>
<p><input type="button" value="Picture"/></p>	<p>Add or change the picture for this member. <i>This button is only visible if you have installed and enabled the Photo Capture add-on. (See Settings/Photo Capture)</i></p>

Bar Code	Change the barcode number for this member. <i>This button is only visible if you have enabled GateKeeper Features. (See Settings/Barcodes)</i>
History	Display a list of all journal transactions for this member.
Visits	Display a list of all previous visits for this member.

Modifying Member Information

Recording a Member Payment

With a member displayed, click on the **Payment** button in the Check-In/Browse window.

The Membership Payment dialog below appears:

The member's current membership information will be shown, along with the amount that the member should pay.

If necessary, select a new Membership Type or Payment Option from the pull down menus. The Total Amount Due and Due Date will update automatically to reflect your current pricing structure.

If you **MUST** change the amount that the member will pay or the new Paid Until date, then click on the Admin button to edit the grayed-out values. *Note: Any changes you make to the Payment Amount or Paid Until fields will only affect the current payment. These changes will not affect this member the next time a payment is made.*

Attaching an Alert to a Member's Record

An Alert is a message attached to a member's record that will cause an Alert dialog to popup when that member is checked-in. If the Show Alerts box is checked in the Check-In window, then the alert will pop up in front of the Check-In window and will remain until the alert is dismissed. If the Show Alerts box is NOT checked, then the alert will simply appear in the Check-In window when the member's record is displayed.

With a member displayed, click on the  button in the Check-In/Browse window.

A dialog appears for you to enter the alert text. The alert can be up to 64 characters. To remove an existing alert, delete the alert text.

Press the ENTER key or click OK with finished.

The alert will pop up when the member is checked-in. At that time, you are given the choice to either Save the alert (so it will pop up again the next time this member's record is displayed) or Delete the alert.

Attaching a Note to a Member's Record

A Note is a message attached to a member's record that appears in the Check-In window when a member's record is displayed.

With a member displayed, click on the  button in the Check-In/Browse window.

A dialog appears for you to enter the note text. The note can be up to 64 characters. To remove an existing note, delete the note text.

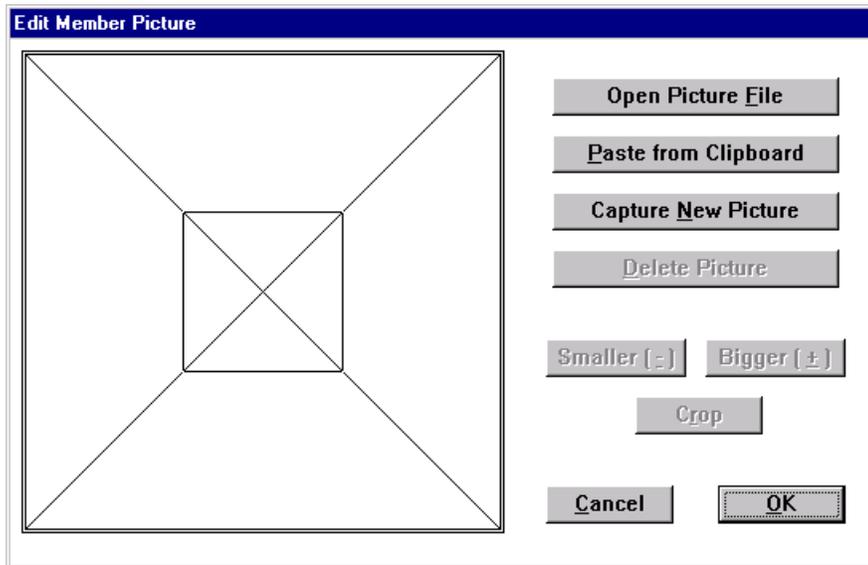
Press the ENTER key or click OK with finished.

Capturing a Member's Picture

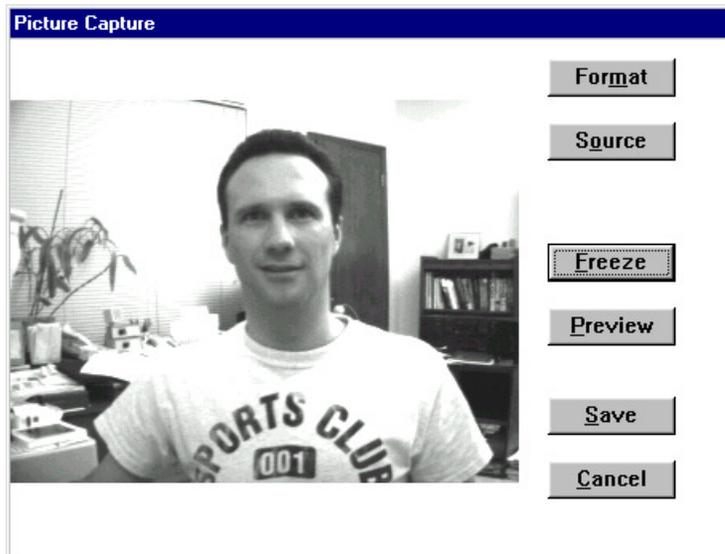
Gym Assistant can capture member photos for display with a member's Check-In information. A video camera source must be connected to your computer and functioning correctly for this function.

With a member displayed, click on the **Picture** button in the Check-In/Browse window.

The Edit Member Picture below appears.



Click the **Capture New Picture** button, and the Picture Capture window appears.



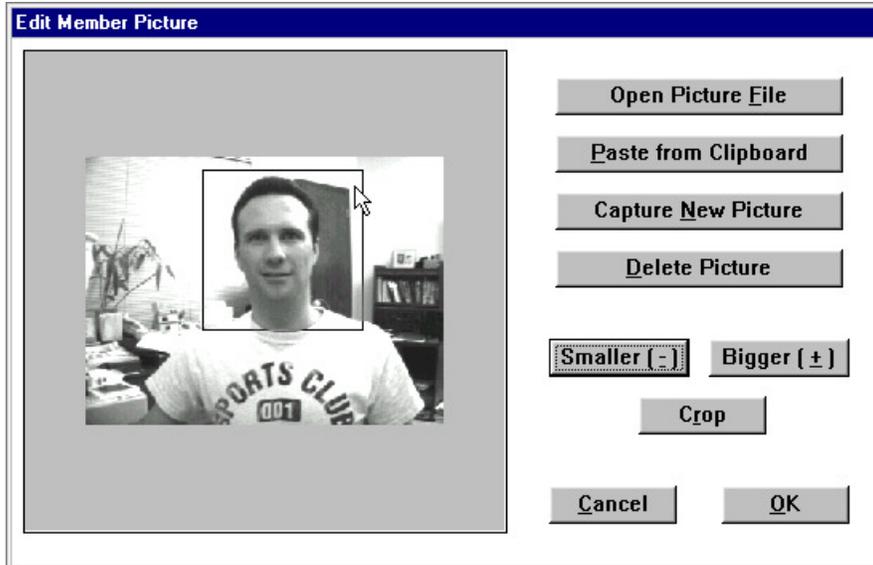
To adjust the image size and resolution, click the Format button.

To adjust the image brightness and contrast, click the Source button.

To freeze the image, press the ENTER key or click the Freeze button.

To un-freeze the image and return to live video, click the Preview button. When you are satisfied with the image you have captured, click the Save button.

The Edit Picture window will reappear with the new image.



The small rectangle that appears represents the area of the picture that will appear with the member's record. Click on the rectangle and drag it to center the person's image in the box. If necessary, click the Smaller or Bigger buttons to make the image bigger or smaller.

When you are finished, click the OK button and the new picture will appear with the member's record.



Changing a Member's Barcode

With the addition of a bar-code reader, Gym Assistant can simplify member check-in by either having the front-desk worker or the member himself swipe the member's card.

With a member displayed, click on the **Bar Code** button in the Check-In/Browse window.

In the window that appears, type in the barcode number and press ENTER or swipe the member's keytag through the barcode reader.

Viewing a Member's Account History

Every change to a member's record (renewals, info changes, etc.) is recorded to a transaction journal.

With a member displayed, click on the **History** button in the Check-In/Browse window.

A new window will appear showing all transactions for this member.

Viewing a Member's Attendance History

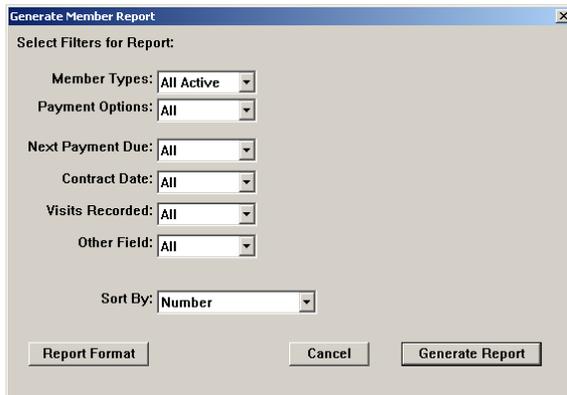
With a member displayed, click on the **Visits** button in the Check-In/Browse window.

A new window will appear showing all the recorded visits for this member.

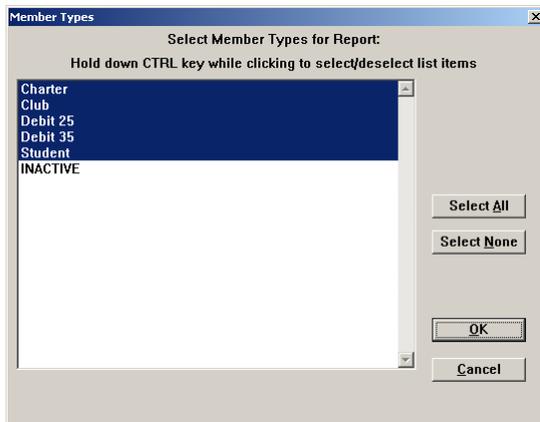
Reports

Generic Report - Membership List

Select Generate Report from the Reports menu. The Generate Member Report window appears.



This very flexible tool allows you to view and print the membership lists that you need. Select the **Member Types** that you would like to display by selecting All or Selected from the Membership Types pull down menu. If you choose Selected, then the Member Types Selection dialog will appear:



By default, all membership types except INACTIVE are selected.

- Select or unselect individual membership types by holding down the CTRL key and clicking on an item in the list.

- Select all membership types by clicking the Select All button.

- Unselect all membership types by clicking the Select None button.

After clicking OK, the selected membership types will appear in the Generate Member Report screen.

Select the **Payment Options** that you would like to display by selecting All or Selected from the Payment Types pull down menu. Select the desired payment types in the window that appears.

Select the **Paid Until** date (or range of dates) that you would like to display by selecting from the Paid Until pull down menu.

- Select All to display all dates.
- Select Before to display only those members due before a specific date.
- Select Between to display only those members due between two specified dates.
- Note that text fields will appear for you to enter dates for the Before and Between selections.

Select the **Contract Fulfilled** date (or range of dates) that you would like to display by selecting from the Contract Fulfilled pull down menu.

- Select All to display all dates.
- Select Before to display only those members whose contracts expire before a specific date.
- Select Between to display only those members whose contracts expire between two specified dates.
- Note that text fields will appear for you to enter dates for the Before and Between selections.

Select the **Sort By** field.

Click the Generate Report button to display the report.

In the report, double-click on any item to view that member's record.

Membership Summary

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

The Membership Summary report displays a table showing the number of members for each membership type. It also shows the number of Inactive and overdue members.

Revenue Projection

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

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.

Visits Detail

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

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

Specify the time span for the report, and then click the **View** button.

Journal Summary

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

The Journal Summary report displays membership change statistics for any given period of time. This report can be used to keep track of operations on a daily or weekly basis. Below is a typical Journal Summary report for one week:

```
Journal Summary for 07/01/97 - 08/01/97

Members Added:      35  ($1850.00)
Members Renewed:   453  ($14362.00)
Members Inactivated: 5
Members Deleted:   3

Total Collected:   $16212.00
```

For month shown in this report:

- 35 members were added with \$1850 collected
- 453 members were renewed with \$14,362 collected
- 5 members were made Inactive and 3 members were deleted
- Total collections were \$16,212

To access the Journal Summary, select Journal Summary from the Reports menu. The Select Date Range dialog will appear for you to specify the beginning and end dates for the report.

Select from a set of standard date ranges from the Date pull down menu or specify your own set of dates by editing the From and To dates.

Journal Detail

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

The Journal Detail report shows all transactions recorded for a given range of dates.

The Select Date Range dialog (shown above) will appear for you to specify the beginning and end dates for the report. Select from a set of standard date ranges from the Date pull down menu or specify your own set of dates by editing the From and To dates.

Below are a few lines from a typical Journal Detail report:

Date	Time	Mem#	Transaction	Description
03/22/97	12:00A	1877	ADD	\$99.00 for 3-Month. Paid Until: 06/22/97
03/22/97	12:00A	313	RENEW	\$50.00 for 1-Month. Paid from 03/15/97 - 04/15/97
03/22/97	12:00A	1878	ADD	\$99.00 for 3-Month. Paid Until: 06/22/97
03/22/97	12:00A	1128	RENEW	\$99.00 for 3-Month. Paid from 03/24/97 - 06/24/97
03/22/97	12:00A	1554	RENEW	\$99.00 for 3-Month. Paid from 03/21/97 - 04/05/97
03/22/97	12:00A	3146	ADD	\$25.00 for Draft Check. Paid Until: 04/01/97
03/22/97	12:00A	3146	EDIT	
03/23/97	12:00A	2004	MEMBER_TYPE	changed from ???? to ????
03/23/97	12:00A	2004	RENEW_AMOUNT	changed from \$60.00 to \$30.00
03/23/97	12:00A	2004	LAST_PAID	changed from 03/19/97 to 03/19/97
03/23/97	12:00A	2004	EDIT	
03/24/97	12:00A	1879	ADD	\$99.00 for 3-Month. Paid Until: 06/24/97
03/24/97	12:00A	1022	ADD	\$50.00 for 1-Month. Paid Until: 04/24/97

Billing

EFTs and Paper Drafts Explained

There are four main ways to handle monthly payments in Gym Assistant:

1. Setting up and maintaining a group of recurring transactions with your bank.
2. Printing paper drafts.
3. Submitting an Electronic Funds Transfer (EFT) file to your bank each month.
4. Entering credit card charges into a terminal.

Each method carries inherent advantages and disadvantages. Regardless which method you choose, Gym Assistant allows you to very quickly generate the information necessary for processing then to renew the entire group of members in one step. (See *Renewing Credit Card Members* and *Renewing Bank Debit Members* below.)

The first method, **recurring bank transactions**, usually involves submitting a form to your bank each time you sign up a new member. The bank will then automatically transfer the desired amount from the member's bank account into the gym's bank account on the same day each month. You are responsible to notify the bank of any changes, such as when a member drops their membership. Banks usually charge a setup fee and then a fixed amount for each transaction each month.

The second method, **paper drafts**, involves having a service print paper drafts for you each month. A paper draft is basically a generic check containing a member's bank account info. Each paper draft contains all the same info as on the member's own checks (member name, bank name and address, bank account numbers). It looks like a normal check (including Pay To The Order Of ... YOU), except the member's signature is replaced by a block of text stating that the transaction is authorized by the member. A paper draft can be deposited as a normal check exactly as if written by the member.

These drafts are normally printed by a service, because the special codes at the bottom of the check (called MICR codes) must be printed with special magnetic toner and must be precisely aligned in very specific areas of the check. Gym Assistant saves bank debit member information to a floppy disk, which can then be mailed to Bio-Logic for processing. This is usually done on about the 20th day of each month. About four days later you receive from Bio-Logic a stack of checks — one for each member — and a deposit slip. Just endorse each of the checks (usually with a rubber stamp) and deposit them at your bank as you would any other checks.

The third method, **Electronic Funds Transfer (or EFT)**, involves transmitting a specially formatted file to your bank. This file (called a "NACHA" file) contains information specifying that money should be transferred from each member's bank account into your gym's bank account. Banks usually charge a fee for each NACHA file received and then a small additional fee for each transaction. Most banks require that NACHA files are submitted via modem, but the banking industry has not standardized on a system for submitting files. While Gym Assistant will create an industry-standard NACHA file, you should check with your bank to see if they have software available for submitting the files.

The fourth method, **credit card charges**, involves entering individual credit card charges into your merchant account terminal.

Bank Acct Electronic Funds Transfers (EFTs) Explained

A *check* is merely a **one-time** written authorization / instruction to pay, directed to a depositor's bank. An *EFT Authorization* also is a written authorization / instruction to pay but it is good for **multiple** transactions. It authorizes a depositor's bank to move funds from his/her bank account to the bank account of the authorized merchant. This movement of funds is done between banks in an encrypted electronic format, hence the term Electronic Funds Transfer (EFT). The electronic movement of funds between banks is more convenient, efficient, secure, faster and far less costly to all involved than the handling of paper checks. The banking system moves trillions of dollars electronically every year without error.

How do Bank EFTs work?

1. **Authorization:** Your member provides you with written authorization to allow you to electronically debit his/her account, along with a voided check.
2. **Enter Data:** You enter the customer's checking or savings account data into Gym Assistant.
3. **Generate Member Transaction Data:** Three days before your processing day (or "debit date"), you use Gym Assistant to generate a data file listing each of the transactions that should occur on the debit date. This file is saved in a secure encrypted format.
4. **Transmit:** You send the secure data file to the EFT Processor via email or direct modem transfer.
5. **Record Member Payments:** In Gym Assistant, you record all payments that were transferred successfully. The due date for each member is moved forward by one month.
6. **Processing:** After the EFT Processor receives your data, the processor reformats and sends the data as an encrypted file, through the Federal Reserve's secure ACH electronic banking system.
7. **Payment:** The money is deducted from your member's account by his/her bank on the debit date, and then immediately deposited into your bank account.
8. **Reporting:** On the fourth business day after the debit date, the EFT Processor sends you a record of any unpaid items and the reason for each nonpayment. In Gym Assistant, you then reverse the previously recorded payments for any members with unpaid items.

Introduction

Before starting, there are a few general concepts that you should understand about monthly debits and how they work in Gym Assistant.

First, some terminology:

- **EFT** is “Electronic Funds Transfer”, a method of collecting money directly from a member’s bank account.
- **ACH** (also known as **NACHA**) is an industry-standard format for describing bank transactions. An ACH file is simply a text file that lists all of the transactions that should occur at one time. This list is also referred to as a “batch”.
- Your **EFT Processor** is the bank or company that receives and processes your ACH file. If your bank is handling your EFTs, then they are your processor. If you are using a third party as your processor, then they are submitting the transactions on your behalf and not handling the money directly. The money is transferred directly from the member’s bank account into your bank account.

It is generally best to debit all your members on the same day of the month. Most clubs will process on the first, but you may want to process on the fifteenth or even another day of the month. Processing on only one day dramatically reduces your administrative time and simplifies your front-desk training. (Member: “When is my next payment due?” Front-Desk: “You are due on the first.”)

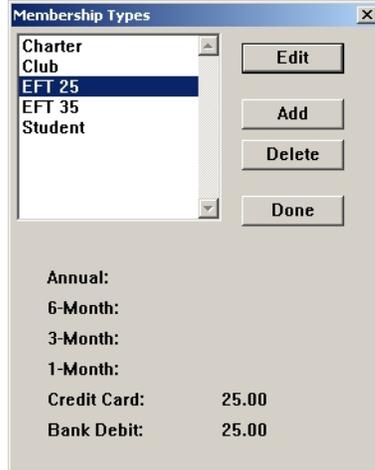
Each month, you go through the following steps (detailed later in this document) to process your Bank Debit members:

- A few days before the actual debit date, you generate an ACH file in Gym Assistant. You simply specify the day on which you want the debits made, and Gym Assistant will list all members who should be debited on that day.
- You send the ACH file to your EFT processor, your bank or some other third party. The method that you use to send the file will depend on your processor.
- Within a day or two you receive a report from your EFT processor showing any transactions that did not clear.
- In Gym Assistant, you renew all members whose debits cleared successfully. You simply specify the day for which you are processing, and Gym Assistant will list all the members who were submitted. You then unselect those members whose debits failed and renew the rest. All those members are then up-to-date for another month.

Setting up Membership Types for Bank Debit

You must first specify at least one membership type with a Bank Debit or Credit Card renewal type.

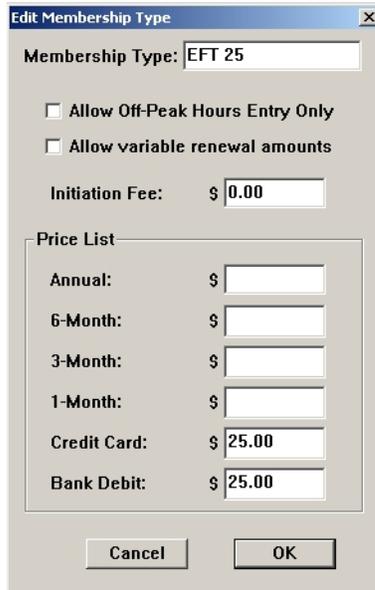
Select **Membership Types** from the **Settings** menu to see a list of your current membership types.



Membership Types list

If you have not already defined your EFT membership types, then click the Add button. Define the new membership type name. We recommend a straightforward naming scheme like “EFT XX”, where XX is the monthly debit amount.

If you have already defined your EFT membership types, then click on an existing membership type and click the Edit button.



Edit Membership Type

Define an amount for Credit Card and Bank Debit (whichever option(s) you plan to offer), then click OK.

Adding a New Debit Member

- In the Member Check-In or Member Browse window, click the **Add New** button.
- Enter a membership number for the member, and then click **OK**.
- Enter the member's personal info, and then click **Next**.
- In the Membership Info window, set the Membership Type to one of the membership types previously defined for Debit members.
- Select the **Bank Debit** or **Credit Card** renewal type. *If neither of these Renewal Type options appears, then you need to abort adding this member and review the Membership Types list as shown above.*
- Specify the **Payment Type** by which the member is paying at sign-up (today), then click **Next**.
- If you specified a Bank Debit renewal type, then the Bank Debit Info window below should appear. If you specified a Credit Card renewal type, then the Bank Debit Info window below should appear.

Bank Debit Info

Credit Card Info

Changing Existing Member Renewal Type and Debit Info

To change an existing member to a Bank Debit (EFT) renewal type:

- Display the member's info in the main Member Info screen.
- Click the Edit button on the right side of the window to access the member's info.
- Click the Admin button in the lower-left corner to enable the membership info fields. (You may also need to input a password.)
- Set the Membership Type to one of the membership types previously defined for Debit members.
- Set the Renewal Type to Bank Debit or Credit Card. *If neither of these Renewal Type options appears, then you need to abort adding this member and review the Membership Types list as shown above.*
- Click the Financial Info button to access the member's bank account or credit card info.

Setting Up Your Bank Debit Processing Info

Select **Bank Debits** from the **Settings** menu to see the Bank Debit Setup window shown below:

Bank Debit Setup

- Set the **Processing Method** to EFT.
- Fill in the **Deposit Info** with your business bank account information:
 - Account Name:** Name on business bank account
 - Account #:** Bank account number
 - Routing #:** Bank routing number (also called “ABA” or “Transit” number)
 - Bank Name:** Name of your bank
- Uncheck **Require ALL Member Bank Info**.
- Uncheck **Debit multiple months for delinquent members**.

- Click the **Edit EFT Info** button to see the Bank Debit EFT Setup window below:

Bank Debit EFT Setup

You should obtain the following values from your EFT processor!

Immediate Origin

Name:

Origin: (Usually blank char followed by RTN)

Immediate Destination

Name:

RTN:

Company

Name:

ID:

Entry Description:

Originating DFI: (Usually first 8 digits of Origin RTN)

Include Balance transaction at end of file

Bank Debit EFT Setup

If you are using **MoneyMovers** to process your EFTs, then fill in the Bank Debit EFT items as follows:

- Immediate Origin:
 - Name: Your business name
 - Origin: 1 + Your Federal Tax ID
- Immediate Destination:
 - Name: "MoneyMovers, Inc."
 - RTN: "954361138"
- Company:
 - Name: Your business name
 - ID: Your Federal Tax ID
- Entry Description: "Fees"
- Originating DFI: "95436113"
- Uncheck **Include Balance Transaction at end of file**

If you are using **MCA** to process your EFTs, then fill in the Bank Debit EFT items as follows:

- Immediate Origin:
 - Name: "MCA"
 - Origin: 1006828425
- Immediate Destination:
 - Name: "MCA"
 - RTN: 006828425
- Company:
 - Name: Your business name

- ID: Your Federal Tax ID
- Entry Description: Fees
- Originating DFI: 006828425
- Uncheck **Include Balance Transaction at end of file**

If you are using any other company to process your EFTs (including your bank), then you will need to obtain the following information from your bank:

- Immediate Origin:
 - Name: Usually your business name
 - Origin: 1 + Your Federal Tax ID or other # designated by your processor
- Immediate Destination:
 - Name: Processor Name
 - RTN: Processor Routing #
- Company:
 - Name: Usually your business name
 - ID: 1 + Your Federal Tax ID or other # designated by your processor
- Entry Description: "Fees"
- Originating DFI: First 8 digits of Processor Routing # or other # designated by your processor
- Uncheck **Include Balance Transaction at end of file**

Processing the Bank Debits

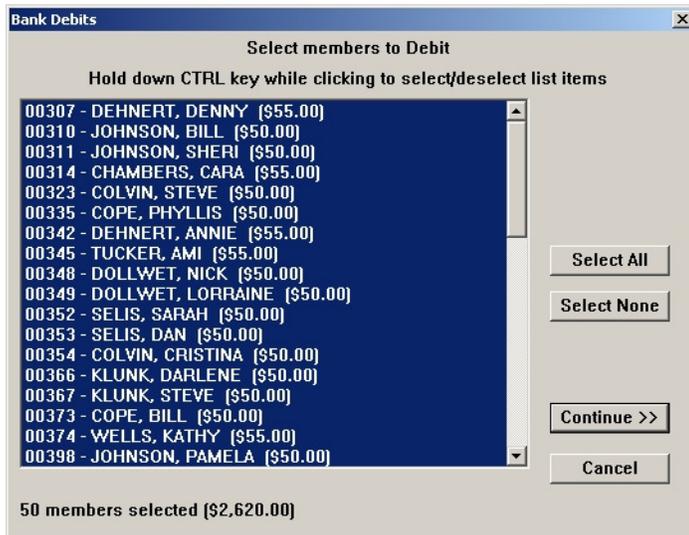
You should submit your EFT information a few days before they are actually due so that any failed transactions can be dealt with appropriately. For example, if you debit members on the first of each month, then you should process your EFTs on the 28th or 29th of the preceding month. You can then renew all those members before their due date.

Select **Process Bank Debit Members** from the **Billing** menu.

Specify a Processing Date, which should be the date on which the debits are actually due. This will determine which members get debited. Gym Assistant will debit all members who (1) have a Payment Option of EFT-Bank (or a Renewal Type of Bank Debit in older versions), and (2) are due one or before the Processing Date.



A list of all Bank Debit members due on or before the Process Date appears.



To select or unselect any member in the list, hold down the CTRL key while clicking on the member. The number of members selected and total of all transactions appears in the lower left corner. Click Continue when you are done.

The Process Bank Debits window appears showing the possible actions that you can take. Each action will display “<Done!>” is that action has been performed.



Process Bank Debits

View List displays a list of the transactions with totals. You should print and save this list to compare with the report returned by your EFT processor.

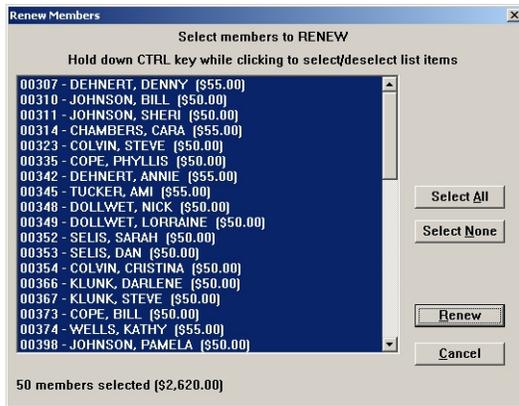
Save to File generates the ACH file and saves the data to your computer's hard drive.

- Gym Assistant asks for **File Submission Date**, which should be the day on which you want the debits to be processed.
- Gym Assistant asks if you want to process as “Pre-Notes” or “Debits.”
 - A **Pre-Note** file contains zero amounts and is used by the bank to test the validity of your data. Submit a pre-note file if requested to do so by your bank.
 - You will usually submit a **Debit file**, which contains the actual amounts. This is the default.
- Gym Assistant asks for a **Batch Number**, which should usually be one for the first batch submitted on a particular day. Your processor, however, may specify a different batch numbering scheme.
- The data will be saved in a folder called EFT within the Gym Assistant folder on your hard disk.

Renew allows you to renew all the selected members so that they are up-to-date for another month.

Note: Do not renew the bank debit members until you confirm that your ACH file has been submitted and received by your EFT processor.

- The Renew Members Selection window below appears with the list of selected members.



- Confirm that the number of members and total transaction amount (displayed in the lower left) are correct. To select or unselect any member in the list, hold down the CTRL key while clicking on the member. Click Renew to continue.
- Gym Assistant asks you to confirm that your transactions have been submitted and accepted by your processor. Click Yes to continue.
- Gym Assistant asks you one more time to confirm that you want to renew these members.
Note: You should only renew members once you are sure that their payments have cleared. Once you renew members for a process date, you will no longer be able to Process Bank Debits for those members on that process date!

Settings allows you to modify your Bank Debit settings.

Done closes the window and ends this processing session.

Submitting the EFT Data

The method used for sending your ACH file to your EFT processor depends on your processor. Contact your processor for instructions on transmitting the file to them.

You will find your ACH files in the EFT folder within the Gym Assistant application folder. For most installations, this folder will be found at:

C:\Gym Assistant 1.5\EFT\

To copy an ACH file to a floppy disk:

- Open **My Computer**
- Open the **Local Disk C:** drive
- Open the **Gym Assistant 1.5** folder
- Open the **EFT** folder
- Select **List** from the **View** menu to see a list of the files (instead of icons)
- Right-click on the file you want, then select **Send To 3 ½ Floppy (A)**

Processing Credit Cards

Then enter the date on which you would like to process, which is usually the first day of each month. Gym Assistant will generate a report showing all Credit-Card members who are due by the process date.

Monthly Credit Card Members Due Before 12/31/99

Process Date: 10/01/98

Number of items: 119

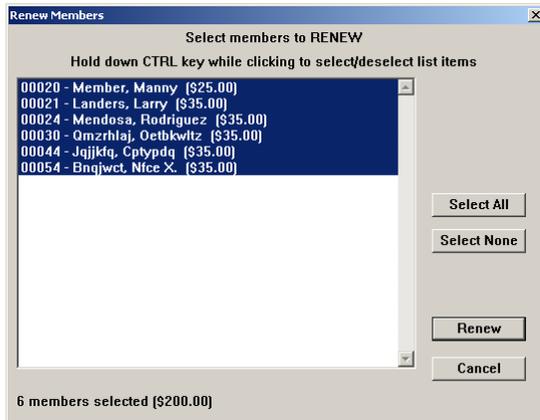
Total Amount: \$5950.00

Number	Name	Type	Card #	Card Exp	Due
22	Ncce, Adzf	AMEX	6014-7907-2993-7804	07/99	\$ 50.00
36	Bigjqo, Cdy	DISC	2484-5656-2203-6627	09/00	\$ 50.00
38	Btkkmfl, Bwgfqap	DISC	0291-6396-5030-7472	08/01	\$ 50.00
155	Mdcy, Ddivhc	AMEX	9586-6549-9880-1506	02/00	\$ 50.00
265	Qcsherb, Torw	MC	1533-1994-9475-1191	12/98	\$ 50.00
1130	Fczsmdsw, Cdhfm	DISC	0955-7077-3597-2201	12/00	\$ 50.00
1342	Gkgqzqclys, Lpzk	DISC	0010-3626-8484-4620	12/99	\$ 50.00
1484	Hpaeum, Iuuvk	DISC	3879-1089-0640-7468	10/00	\$ 50.00

Click the Print button to print this report and use it to enter credit-card transactions from your data terminal. When you are finished, click the Process button to bring up an alternative report that can be sent to some financial institutions for processing.

Recording Monthly Credit Card Payments

You can renew all credit-card members in one easy step. Select **Renew Credit-Card Members** from the Billing menu. Then enter the date on which you would like to process, which is usually the first day of each month. Gym Assistant will generate a list showing all Credit-Card members who are due by the process date.



You can unselect individual members in the list by holding down the CONTROL key while clicking on that member's name. The number of members selected and total dollar amount at the bottom of the window will update when you select or unselect any members.

When you are ready to renew the members, click the RENEW button.

Gym Assistant will ask you to confirm that you want to renew the selected members. Click the Renew button to continue. Gym Assistant will tell you how many members were renewed.

Credit Cards – Displaying Expired Cards

To display a list of all members whose credit cards are expired or will expire soon, select **Display Expiring Cards** from the Billing menu.

Double-click on any member in the list to bring up that record for editing.

Bank Debits – Print Draft Deposit Slip (Drafts only)

If you are printing Paper Drafts for your Bank Debit members, then you Gym Assistant can print a deposit slip for you. The deposit slip is automatically printed for you when you renew your bank debit members, but you can print a deposit slip before renewing by selecting Print Deposit Slip from the Billing menu.

Follow the same steps as above in Bank Debits – Renewing to select the members for the deposit slip.

Bank Debits – Print Draft Re-Do Order (Drafts only)

If you are printing Paper Drafts for your Bank Debit members, then at some point you may need Bio-Logic to re-print one or more drafts. This may occur if a member's bank account info changes or you mis-typed some of the bank information. Gym Assistant will print a re-do order which you can then fax to Bio-Logic.

Select Print Draft Re-Do Order from the Billing menu. Enter a member's membership number or name and click OK.

In the next dialogs that appear, enter the amount to debit the member and the reason the re-do.

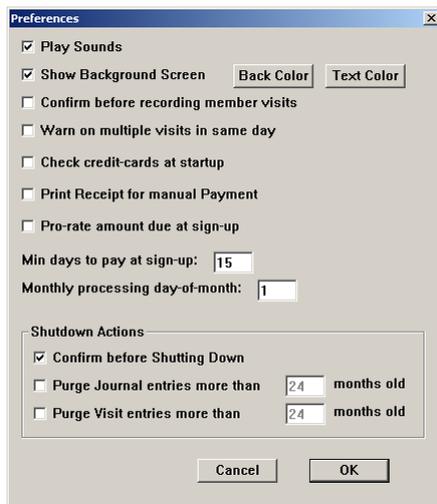
Next a window appears with the Re-Do order text. Click on the Print button to print the re-do order. Or you can select all the text and select Copy from the Edit menu to copy the text into your email program.

Settings

The Settings menu contains items for changing how Gym Assistant looks and works.

Preferences

The Preferences dialog contains general preferences for Gym Assistant. Select Preferences from the Settings menu.



If **Play Sounds** is checked, then Gym Assistant plays a sound when a member is delinquent or up-to-date.

If **Show Background Screen** is checked, then the Gym Assistant background screen appears. On Macintosh, the background screen blocks out all other programs so you will not accidentally switch to another program by clicking on one of its windows. To change the background color or text color for the background window click on the Back Color or Text Color buttons.

If **Check credit-cards at startup** is checked, then Gym Assistant checks all monthly credit-card members for expired (or soon-to-expire) credit cards and brings up a report if any are found. You can do this same function manually at any time by selecting **Display Expiring Credit Cards** from the Billing menu.

Min days to pay at sign-up determines the minimum number of days that a member should pay for at signup. This only affects monthly memberships (including Bank Debits and Credit Cards). For example, consider the case where the minimum days to pay at signup is set at 15 days. If a member signs up on the 10th of January, then they will only pay up-front for 21 days and their first payment will be due February 1. If they sign up on the 20th day of January, then their first payment will be due March 1 and they will pay up-front for both the remaining 11 days in January and the entire month of February. Gym Assistant will calculate the exact amount due at signup.

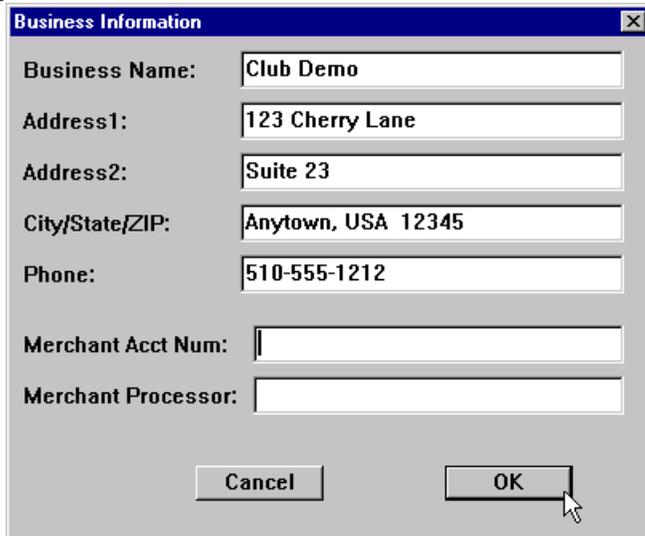
If **Confirm before Shutting Down** is checked, then Gym Assistant will always ask “Are you sure you want to quit?” before shutting down. This prevents accidentally shutting down Gym Assistant.

If **Purge Journal entries** is checked, then Gym Assistant will delete old journal entries when you shut down. *(The transaction journal, or “history”, records every change to every member record — adding new members, renewing, changing address info, etc. To view the transaction history for all members over a period of time select Journal Summary or Journal Detail from the Reports menu. To view a member’s history, click the History button while that member is displayed.)* Purging old journal entries prevents the transaction journal from growing excessively large, which slows down the program when viewing the transaction history.

If **Purge Visit entries** is checked, then Gym Assistant will delete old visit entries when you shut down. *(If Attendance Tracking is turned ON — see Settings/Modules — then every member visit is recorded. To view the attendance history for a member, click the Visits button while that member is displayed.)* Purging old visit entries prevents the attendance file from growing excessively large, which slows down the program when viewing the attendance history.

Business Info

The Business Info dialog contains basic business information. This information will appear in form letters and contracts printed by the program. To change these settings, select **Business Info** from the **Settings** menu.

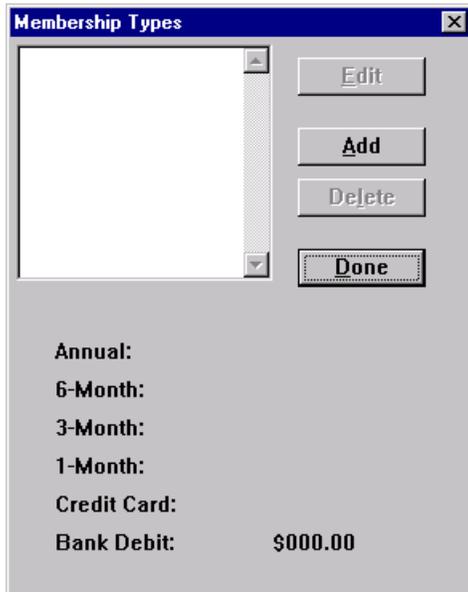


The image shows a screenshot of a 'Business Information' dialog box. The dialog has a title bar with the text 'Business Information' and a close button (X). The main area contains several text input fields with labels to their left: 'Business Name:' with the value 'Club Demo', 'Address1:' with '123 Cherry Lane', 'Address2:' with 'Suite 23', 'City/State/ZIP:' with 'Anytown, USA 12345', 'Phone:' with '510-555-1212', 'Merchant Acct Num:' with an empty field, and 'Merchant Processor:' with an empty field. At the bottom of the dialog are two buttons: 'Cancel' on the left and 'OK' on the right. A mouse cursor is pointing at the 'OK' button.

Membership Types

The Membership Types window allows you to define your membership types and pricing structure. To change these settings, select **Membership Types** from the **Settings** menu.

The Membership Types window appears for you to enter the different membership types that you offer.



The list of membership types defines your club's "price list" with different membership options. Each membership type includes the following options:

- Name (e.g. "Club")
- Hours of entry (ALL or off-peak only)
- Initiation Fee
- Renewal Prices

Any single membership type can have multiple renewal options. For instance, a Club membership may have options to pay Annually, every 6-months or monthly (as automatic Credit Card payments or Bank Debits).

Click the Add button to add a new membership type. The Edit Membership Type window below will appear:

Edit Membership Type

Membership Type:

Allow Off-Peak Hours Entry Only

Initiation Fee: \$

Price List

Annual:	\$	<input type="text" value="360.00"/>
6-Month:	\$	<input type="text" value="180.00"/>
3-Month:	\$	<input type="text"/>
1-Month:	\$	<input type="text" value="30.00"/>
Credit Card:	\$	<input type="text"/>
Bank Debit:	\$	<input type="text"/>

Type in a Name for the new membership type, then tab to the Initiation Fee field.

Enter the initiation fee in dollars.

Enter the renewal fee for each Renewal Type that you offer for this membership type.

In the figure above, only the Annual, 6-Month and 1-Month renewal options are available for this membership type.

When you are finished, press the ENTER key (or click the OK button).

The new membership type will then appear in the Membership Types window. Add as many membership types as you need in the Membership Types window, then click done to finish.

Reports

The Reports dialog allows you to specify which fields appear in membership reports. To change these settings, select **Reports** from the **Settings** menu.



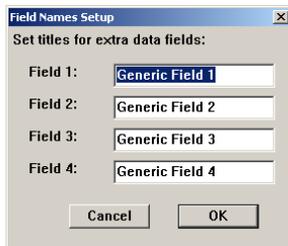
Check those fields that you want to appear.

Note that the order of the fields is fixed.

Field Names

Each member record contains four generic text fields that can contain any type of information. For example, you may want to record members' driver's license numbers or work phone numbers. These fields appear in the **Member Display / More Info** window when you click on the **Other** button.

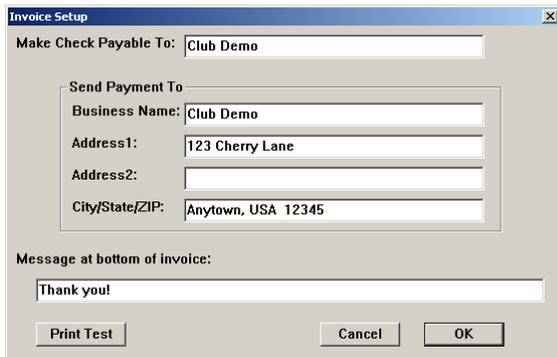
To change the labels for these four generic fields, select **Field Names** from the **Settings** menu.



The **Field Names Setup** dialog box is titled "Field Names Setup" and contains the instruction "Set titles for extra data fields:". It features four input fields labeled "Field 1:", "Field 2:", "Field 3:", and "Field 4:". Each field currently contains the text "Generic Field 1", "Generic Field 2", "Generic Field 3", and "Generic Field 4" respectively. At the bottom of the dialog are "Cancel" and "OK" buttons.

Invoices

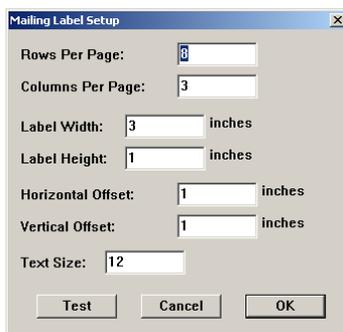
The Invoices Setup dialog allows you to specify the information and layout for printed invoices. To change these settings, select **Invoices** from the **Settings** menu.



The **Invoice Setup** dialog box is titled "Invoice Setup" and contains several sections. The "Make Check Payable To:" field is set to "Club Demo". The "Send Payment To" section includes "Business Name:" (Club Demo), "Address1:" (123 Cherry Lane), "Address2:" (empty), and "City/State/ZIP:" (Anytown, USA 12345). Below this is a "Message at bottom of invoice:" field containing "Thank you!". At the bottom are "Print Test", "Cancel", and "OK" buttons.

Mailing Labels

The Mailing Labels Setup dialog allows you to set the layout for mailing labels. To change these settings, select **Mailing Labels** from the **Settings** menu.



The **Mailing Label Setup** dialog box is titled "Mailing Label Setup" and contains several input fields for layout settings: "Rows Per Page:" (8), "Columns Per Page:" (3), "Label Width:" (3 inches), "Label Height:" (1 inches), "Horizontal Offset:" (1 inches), "Vertical Offset:" (1 inches), and "Text Size:" (12). At the bottom are "Test", "Cancel", and "OK" buttons.

Click the **Test** button to print out a sample mailing label page. Change the **Horizontal Offset** and **Vertical Offset** values to move the entire page left/right and up/down.

Passwords

The Passwords dialog allows you to set Gym Assistant passwords. To change these settings, select **Passwords** from the **Settings** menu.



User password is required to start the program. User access allows you to add, view and renew members as well as view most reports.

Admin password is required to change member information (other than standard renewals), to view some reports and to do all billing.

Master password is required to change program settings and to do most utilities.

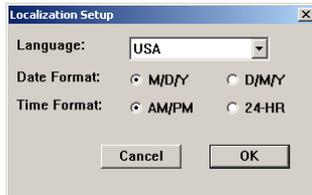
Deleting a password disables the password protection for that particular access level, but not for lower levels.

When Gym Assistant asks for a User password you can enter one of the higher-level passwords (Admin or Master) to continue. As well, when Gym Assistant asks for an Admin password you can enter the Master password to continue.

If you lose your master password, please contact Bio-Logic for a back-door password to allow access to your password settings.

Locale

Gym Assistant is localizable to different areas of the world. To change the localization settings, select **Locale** from the Settings menu.



The **Language** setting specifies the translation language.

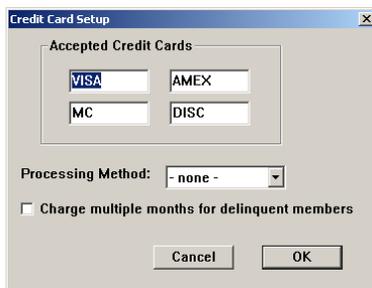
Date Format specifies whether dates should be displayed as Month-Day-Year (M/D/Y) or Day-Month-Year (D/M/Y) format.

Time format specifies whether times should be displayed as AM/PM or 24-Hour.

Locale settings take affect the next time you start Gym Assistant.

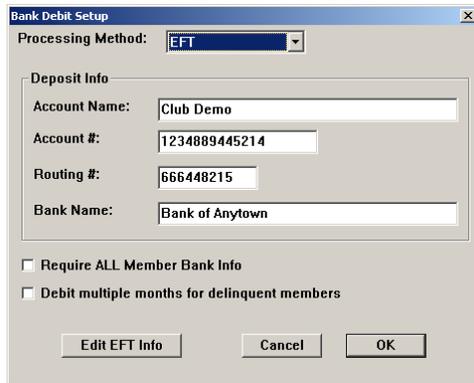
Credit Cards

The Credit Card Setup window allows you to specify up to four credit-card types that are accepted. If you accept more than four credit card types, then list the most common types first and define the fourth type as something generic (such as "CARD"). The first four digits of the card number will specify to your merchant banking service the card type.



Bank Debits

Select Bank Debit Processing from the Settings menu.



The image shows a 'Bank Debit Setup' dialog box. At the top, there is a 'Processing Method' dropdown menu set to 'EFT'. Below this is a 'Deposit Info' section with four text input fields: 'Account Name' (Club Demo), 'Account #' (1234089445214), 'Routing #' (666448215), and 'Bank Name' (Bank of Anytown). At the bottom of the dialog, there are two unchecked checkboxes: 'Require ALL Member Bank Info' and 'Debit multiple months for delinquent members'. At the very bottom are three buttons: 'Edit EFT Info', 'Cancel', and 'OK'.

*Please refer to **Setting Up Your Bank Debit Processing Info** for information on setting up Bank Debits.*

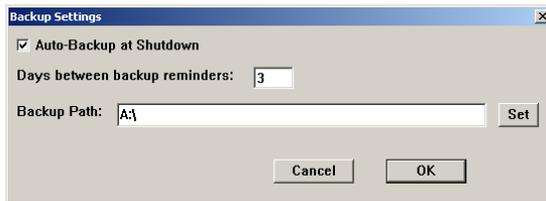
Photo Capture

You can specify the default picture-scaling factor by selecting Photo Capture from the Settings menu. Enter the scaling factor in the dialog that appears.

An individual member's photo can be enlarged or shrunk when it is captured.

Backup

The Backup Settings window contains pertinent settings for backing up your data.



Check the **Auto-Backup at Shutdown** box if you want Gym Assistant to automatically backup your data to your hard disk (in the Gym Assistant directory) whenever you quit the program. This takes only a few seconds, and so we recommend that you leave this box checked.

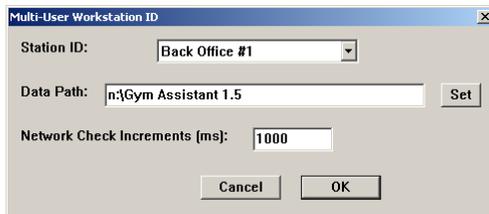
Days between backup reminders sets the number of days until Gym Assistant reminds you to do a backup. We recommend that you set this value to 2 or 3, so that you will not forget to backup your data to a floppy disk every day.

Backup Path specifies the location where you will backup your data. If you are backing up to a floppy disk, then this should be set to "a:\". If you are backing up to another location on your hard driver or on a local network, then you can specify the location by either typing in the path or clicking the Set button and browsing for the location.

Gym Assistant allows you to specify a different backup path each time you actually backup.

Workstation ID

If you purchased a **Multi-User** version of Gym Assistant, then you can have more than one computer, or “workstation”, accessing the data file. Workstation ID is only relevant if you are using the Multi-User capabilities of the software. To change these settings, select **Workstation ID** from the Settings menu.



The Station ID identifies this particular computer on the network, as each workstation accesses the data in slightly different ways.

Select **Front-Desk Single-User** if this is the front-desk computer and you **are not** using Gym Assistant's multi-user capabilities (i.e. you are not using another workstation). This setting disables all multi-user functions.

Select **Front-Desk Multi-User** if this is the front-desk computer and other computers will be accessing the database. This setting enables all multi-user functions and allows access to the database by other workstations.

Select **Back Office #1** or **Back Office #2** if this computer will be accessing the database on another computer. That other computer must be set as the **Front-Desk Single-User** workstation. Only one computer can be designated as Back Office #1, and only one computer can be designated as Back Office #2.

If you select Back Office #1 or Back Office #2, then the Data Path and Set items appear in the dialog. You must specify the path to the MEMBERS.DAT data files (in the Gym Assistant directory on the front-desk computer) in the Data Path field. You can easily set this path by either typing in the path or clicking on the Set button and browsing your network

Utilities

Print Forms for Members

Gym Assistant can print out forms for selected groups of members. To print a form for a single member, select Print Form from the Members menu.

Note: Before printing a form for a group of members, you must first edit the form with the Edit Form Template command shown below.

Printing *Forms* for members works exactly the same as printing *Letters* for members. Select Print Forms for Members from the Utilities menu. Then follow the same steps outlined below in Print Letters for Members.

Print Letters for Members

Gym Assistant can print out letters for selected groups of members. To print a letter for a single member, select Print Letter from the Members menu.

Note: Before printing a form letter for a group of members, you must first edit the letter with the Edit Letter Template command shown below.

Select Print Letters for Members from the Utilities menu. A dialog appears for you to select the letter to print. A sample of the letter then appears. After reviewing the letter, click OK to continue.

The Print Form Letters window then appears for you to select the members for which this form will be generated. Click Print Letters to continue.

A list of all members that matched the search appears. Click the Print Letters button to continue.

Edit Form Template

Gym Assistant can print out forms (such as membership contracts) for single members or for selected groups of members. To edit the Template for a form, select Edit Form Template from the Utilities menu.

Ad dialog will appear asking if you want to create a **new** form or edit an **existing** form. Click **Existing**.

Select the form that you want to edit, and click the **Open** button. The form template will appear in the window shown below:

The screenshot shows a window titled "CONTRACT.TXT" containing a form template. The text in the window is as follows:

```
[DATE]
Membership #:[MEMBER_NUM]

[MEMBER_NAME]
[MEMBER_ADDRESS1] [MEMBER_ADDRESS2]
[MEMBER_CITY]
[MEMBER_PHONE]

I agree to pay the full subscription of ${RENEW_AMOUNT} for a [MEMBER_TYPE] membership which will
expire on [PAID_UNTIL].

Please see attached receipt for advance payment of ${PREPAID_AMOUNT}.

STAFF _____
CLIENT _____
```

At the bottom of the window, there are five buttons: "Print Sample", "Font...", "Insert...", "Cancel", and "Save".

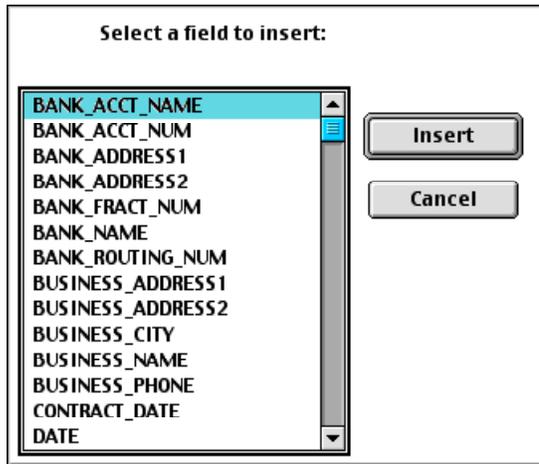
Click the **Font** button to change the font for the form or letter. The Font Selection Dialog below appears:

The screenshot shows the "Font Selection Dialog" window. It contains the following elements:

- Font:** A list box showing various fonts, with "Arial" selected.
- Size:** A dropdown menu showing "11".
- Style:** A group box containing four checkboxes:
 - Bold
 - Italic
 - Underline
 - Outline
 - Shadow
- Spacing:** A group box containing three radio buttons:
 - Normal
 - Condensed
 - Extended
- Buttons:** "Cancel" and "OK" buttons.

Select the font, size, style and spacing you want. Note that only one font can be selected and that the entire form/letter will appear in the selected font.

To insert a field into the form/letter, place the cursor in the desired location and click the **Insert** button. The Field Insertion dialog below appears:



Select the field to insert and click the **Insert** button. Fields appear in the template as a field name in brackets, such as [MEMBER_NAME]. These fields can be copied and pasted freely in the template.

To preview the form/letter, click the **Print Sample** button.

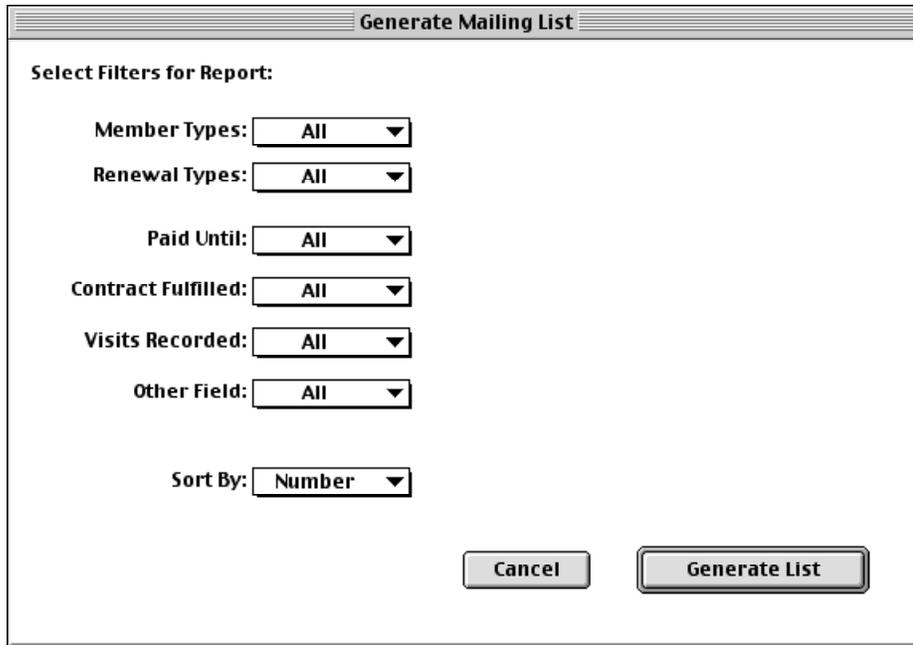
When you are finished editing the template click the **Save** button.

Edit Letter Template

Editing a letter template is exactly the same as editing a form template (see above), except you must select **Edit Letter Template** from the **Utilities** menu.

Print Mailing Labels

To print a set of mailing labels, select Print Mailing Labels from the Utilities menu. The Generate Mailing List window appears:



The screenshot shows a dialog box titled "Generate Mailing List". Inside, there is a section labeled "Select Filters for Report:". Below this section are seven dropdown menus, each with "All" selected: "Member Types", "Renewal Types", "Paid Until", "Contract Fulfilled", "Visits Recorded", and "Other Field". Below these filters is a "Sort By:" dropdown menu with "Number" selected. At the bottom right of the dialog box are two buttons: "Cancel" and "Generate List".

Set the appropriate filters to select members, and then click the **Generate List** button.

A list of members selected will appear. Click the Print Labels button to continue.

After confirming that you want to print, the labels will be printed.

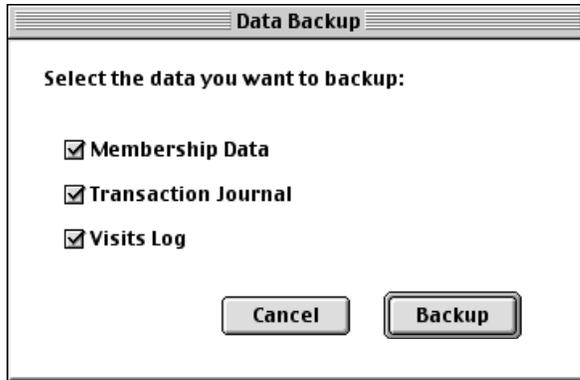
*Note: To change the page layout for your particular labels, select **Mailing Labels** from the **Settings** menu.*

Backup to Disk

You should back up your data to floppy disk every day.

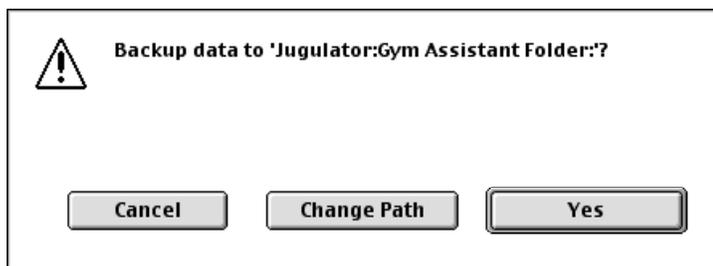
*Note: For more information about backing up and archiving your data, please see **Archiving Your Data** under **Special Topics** below.*

Select **Backup to Disk** from the **Utilities** menu. The Data Backup dialog below appears:



Check the boxes for the items you want to backup, and then click the **Backup** button.

Gym Assistant will ask you to confirm where you want to backup the data.



To accept the default backup path, click **Yes**. To change the backup path, click **Change Path**.

Restore from Backup

If your computer's hard disk becomes corrupted or is suddenly unavailable (because of theft or fire), then you will need to restore your data from a backup.

*Note: For more information about backing up and archiving your data, please see **Archiving Your Data** under **Special Topics** below.*

To restore your data, you must first copy the backup files from your back disk to the Gym Assistant directory. Then select Restore from Backup from the Utilities menu.

The Data Restore dialog below appears:



Check the boxes for the items you want to restore, and then click the **Restore** button.

Gym Assistant will then ask you to confirm that you have copied the backup files to the Gym Assistant directory. If you have, then click **Yes**. Otherwise click **No**.

Gym Assistant will import the information from the backup file and then report how many records were restored.

We recommend that you restart Gym Assistant (by quitting the program and then restarting the program) after restoring to ensure that all the new data is saved.

Purge Old Journal Entries

Gym Assistant records all membership changes in a Journal file. This file will grow in size indefinitely unless old entries are occasionally deleted. An overly large journal file will slow down the program when displaying a member's history, displaying a Journal Summary or Journal Detail report or backing up your data.

If you have checked the **Purge Journal Entries** item in the **Set/Preferences** dialog (the recommended setting), then the journal will be purged each time the program shuts down. If not, then you should purge old journal entries manually when the journal file grows very large.

Select **Purge Old Journal Entries** from the **Utilities** menu.

Gym Assistant will ask you twice to confirm that you want to purge old journal entries. Click the **Purge** button each time to continue.

Gym Assistant then asks you for the age of entries to be purged. This is the number of months for which entries will be **not** be deleted. Six months is a good value.

After deleting old entries, the number of entries deleted and retained will be displayed.

Export Member Data

Gym Assistant imports and exports member data in a special text format, called BTX. This format is proprietary to Gym Assistant but can be viewed with any text editor, which is capable of handling very large text files.

*Note: You should rarely, if ever, need to manually import or export your member data.
Please contact Bio-Logic for more information on this topic.*

To export your membership data, select **Export Member Data** from the **Utilities** menu. You will be prompted to specify a location to save the data.

Import Member Data

*Note: You should rarely, if ever, need to manually import or export your member data.
Please contact Bio-Logic for more information on this topic.*

To import a membership data file that was previously saved in BTX format, select **Import Member Data** from the **Utilities** menu. An Open File dialog appears for you to select the data file to import.

Export Journal

This function is included as a utility to copy the journal file to another location. You should never need to use this function.

*Note: You should rarely, if ever, need to manually import or export your journal data.
Please contact Bio-Logic for more information on this topic.*

Import Journal

This function is included as a utility to copy the journal file to another location. You should never need to use this function.

*Note: You should rarely, if ever, need to manually import or export your journal data.
Please contact Bio-Logic for more information on this topic.*

Export Membership List

This feature exports a complete listing of your membership data to a text file. This file can then be viewed (or printed) with any text editor that is capable of handling a very large file.

Database Diagnostics

This feature is only active if you are running a multi-user enabled version of Gym Assistant. It will bring up a diagnostic window to monitor the workstations that are sharing the data files. You should only use this feature if you are specifically requested to do so by Bio-Logic technical support staff.

Special Topics

Connecting a Barcode Reader

Gym Assistant is compatible with any standard barcode reader. Most barcode readers insert between your computer and the keyboard. Any data scanned from a card is entered on the screen as if it had been typed at the keyboard.

One disadvantage of this type of barcode reader (called a “**keyboard wedge**”) is that the software must be ready to accept keyboard input when the card is swiped. If you want to setup a standalone unattended barcode reader (such as to control a turnstile or gate), then you will need a barcode reader with a **serial interface**. A separate software module called **GateKeeper** (also available from Bio-Logic) monitors the barcode reader input on your computer's serial port and automatically checks a member's status when his or her barcode is swiped.

Please contact Bio-Logic for more information about GateKeeper and barcode readers.

Controlling a Turnstile

The separate software module called **GateKeeper** (also available from Bio-Logic) not only interfaces with a serial barcode reader, it also is capable of controlling an electronic turnstile. Front-Desk employees are not longer tied to the front desk when GateKeeper will automatically check-in members and grant access to those members who are up-to-date. GateKeeper automatically denies entry to those members who are delinquent or who are limited to off-peak hours only.

Please contact Bio-Logic for more information about GateKeeper and Turnstile control.

Backing Up Your Data

You should back up your data at least once a week, but we recommend backing up every day. Once you set up a backup routine, it only takes about a minute each day and may save you hours and hours of headaches (and maybe even thousands of dollars) in the future.

Why Backup?

A power surge or blackout can destroy your computer. A thief can steal your computer. A fire can destroy your building. A mischievous employee can erase your computer's hard drive....

These are all nightmare scenarios, but if your data is backed up and archived, you can be back up and running in a matter of minutes without an adverse effect on your business.

Creating a backup system day-to-day

The best backup system not only saves data from the previous day, but also allows you to go back in history to any day in the past. A very simple backup system can do this for you.

First, buy a box of diskettes. Label seven disks each with a day of the week — Monday, Tuesday, etc.

At the beginning of every day (or at the end of every day) do a backup onto the disk labeled with that day. Backup onto the Monday disk on Monday, the Tuesday disk on Tuesday, etc. That way if you discover on Wednesday that you made a dreadful mistake on Tuesday (like renewing the wrong group of members) then you can restore from that day's disk.

Archiving Your Data

You should also archive data off-site at least once every month. This ensures that a total disaster (such as fire) at your gym will not wipe out all your business data. Just backup onto a floppy the last day of each month and take the disk home with you.