



Release notes 4.79

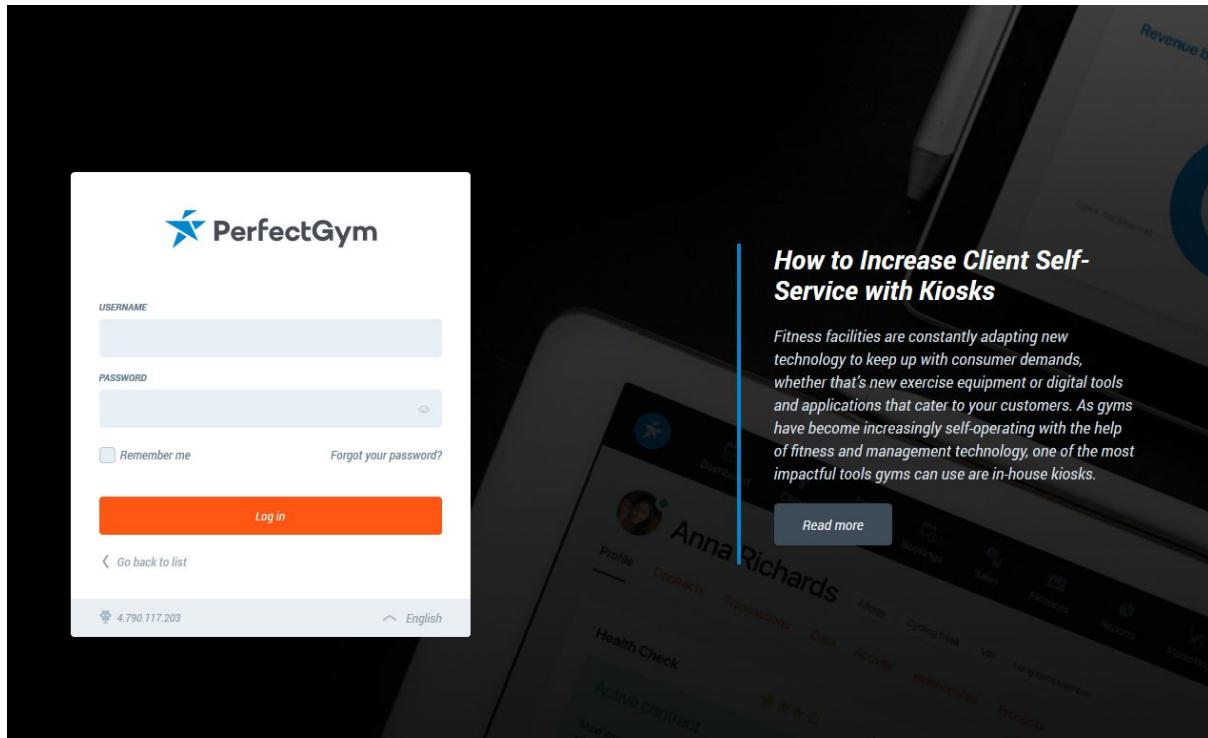
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Perfect Gym Manager

New Login Page & Newsletter

We have introduced a new Login Page to better inform you about upcoming changes in Perfect Gym. Additionally, you can now subscribe to our newsletter directly from the **Employees Section** in Perfect Gym.



New Profile

Beta-version of New Member's Profile is now available! We've completely redesigned the whole module, which is a huge step forward in terms of daily operations and user experience. Test the New Member Profile on your side and let us know if there is something we can help you with. First, you will be welcomed with this pop-up:

New members list is here! Compare and try it.

Filters

Birth date Club

Shakira Gregg 24/03/1911 Christopher Motawali 03/08/1925 Credit Details 03/09/1923

Club members

Number	Name	Surname	Club	Email	Max Gym London - Bristol
120000003	Edyta	Kowalska	Egurda	edt@xmail.com	Max Gym London - Bristol
102000096	Janek	jakubasic	Egurda	jan@woolivadlawyers.us	Max Gym London - Bristol
120000002	Mike	Tyson	Egurda	llyy@ipm1.com	Max Gym London - Bristol
345000003	Jarek	Black	Egurda	llyl@gmail.com	Max Gym London - Bristol
120000001	Edyta	Bzepka	Egurda	llyw@gmail.com	Max Gym London - Bristol
345000002	Emert	Ewert	Egora	lyy@proton.me	Max Gym London - Clapham Junction Station
101000187	Zofia	Kowalska	Egora	llyy@gmail.com	Max Gym London - Clapham Junction Station
102000095	xxx	xxx	Egora	llyy@proton.me	Max Gym London - Clapham Junction Station
345000001	Marysia	Kowalska	Egora	llyy@proton.me	Max Gym London - Clapham Junction Station
102000094	Maria	Merka	Egora	llyy@proton.me	Max Gym London - Clapham Junction Station
101000186	Edyta	Bzepka	Egora	llyy@gmail.com	Max Gym London - Canary Street (Soho Gym)
102000093	Kamil	Kowalski	Egora	llyy@gmail.com	Max Gym London - Canary Street (Soho Gym)
102000092	xxx	xxx	Egora	llyy@proton.me	Max Gym London - Devonshire Square (Liverpool St)
102000091	Edyta Bzepka	Bzepka	Egora	llyy@proton.me	Max Gym London - Devonshire Square (Liverpool St)
102000090	Sebastian	Szczepkowski	Egora	llyy@proton.me	Max Gym London - Devonshire Square (Liverpool St)
104000028	Test	Test	Egora	llyy@proton.me	Max Gym London - Devonshire Square (Liverpool St)
102000092	Grocole	Test	Egora	llyy@gmail.com	Max Gym London - Devonshire Square (Liverpool St)
102000021	Charles	Gavin	Egora	llyy@gmail.com	Max Gym London - Devonshire Square (Liverpool St)
104000027	Jaydoh	Jaydoh	Egora	llyy@sandrasbs@gmail.com	Max Gym London - Devonshire Square (Liverpool St)
106000020	test	test	Egora	llyy@gmail.com	Max Gym London - Devonshire Square (Liverpool St)

Page size: 25 4 5 45 100 per page

No, use current version Yes! Try the new one

Don't worry, you can switch back to old version at any moment.

Alina PGM New York New Hampshire

Please, make sure to explore this new platform. If you notice any room for



improvement, let us know by clicking: **Please leave a comment** button on the top of the screen:

A screenshot of a software application window titled "CUSTOMERS". At the top, there is a blue header bar with the text "You're using the new version of Members list. Have any Improvement Ideas? Please leave a comment" and "You can switch to old version here". Below the header is a search bar with a magnifying glass icon and the word "Search". To the right of the search bar are two buttons: "Add member" and "Add guest". The main area contains a table with columns for "User type", "User number", "First name", "Last name", "Phone", "Email", and "Club". A dropdown menu labeled "Everyone" is open above the table. The table has several rows of data, though they are not clearly legible.

Automation of Payment Booking

You can now plan all recurring payment bookings yourself. Go to **Payments ->Auto bookings generation** to plan your billing. You can also set payment bookings to be automatically accepted. In order to do so, you will not need to log in to Perfect Gym to confirm your payment booking.

Dashboard Widgets

Dashboard is meant to provide you with instant feedback and insight on your business operations. We have introduced new widgets that were recommended by our clients.

- **Visits per member:** Purpose of widget is to show how many members are visiting club every month
- **Freeze of contracts:** Widget shows the amount of members that have frozen memberships during a certain month.
- **Average membership fee:** Widget shows the current average membership fee among all members at your club
- **Payments by source:** Widget shows the amount of collected payments categorized by source, like Cash, Credit Card or Online Payments
- **Update of Total Revenue:** Widget options have been extended from 3 categories to 7 (Membership Fee, Joining Fee, Prorata, Products, Services, Personal Training, Other)

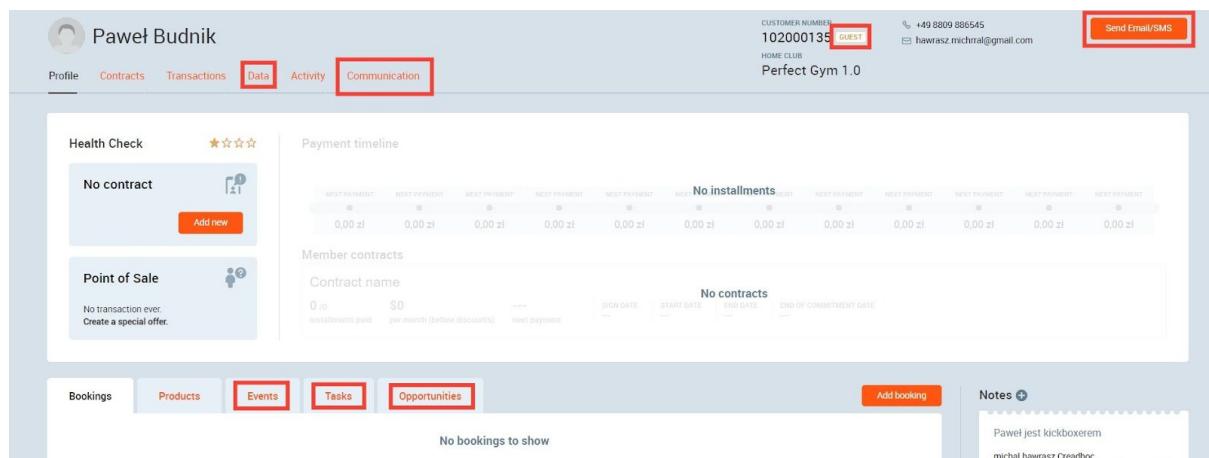


CRM 2.0

Customer 360 View

CRM 2.0 offers a complete Lead profile that contains all Lead information, including personal data and related calls, meetings, and tasks. The profile is consistent with the new Member (and Guest) profile in terms of the layout and the underlying data. In addition, when a Lead gets converted, all its data will be transferred to its Guest or Member profile.

This resolves the problem of inconsistent data syncing between CRM and PGM, which was a common issue in CRM1.



The screenshot shows the CRM interface for a customer named Paweł Budnik. The top navigation bar includes Profile, Contracts, Transactions, Data (highlighted with a red box), Activity, and Communication. Customer details on the right include Customer Number (102000135), Home Club (Perfect Gym 1.0), and contact information (+49 8809 886545, hawrasz.michal@gmail.com). A 'Send Email/SMS' button is also present.

The main content area is divided into several sections:

- Health Check:** Shows a 3-star rating and a 'No contract' status with an 'Add new' button.
- Point of Sale:** Displays a message: 'No transaction ever. Create a special offer.'
- Payment timeline:** A table showing 12 months of payment history, all marked as '0,00 zł'.
- Member contracts:** Shows a table for 'Contract name' with 0 installments and 0 next payment.
- Bookings, Products, Events, Tasks, Opportunities:** Buttons for these modules.
- Notes:** A section containing a note: 'Paweł jest kickboxerem' and 'michal.hawrasz.Creadhoc'.



Meetings and Calls on Guests and Members

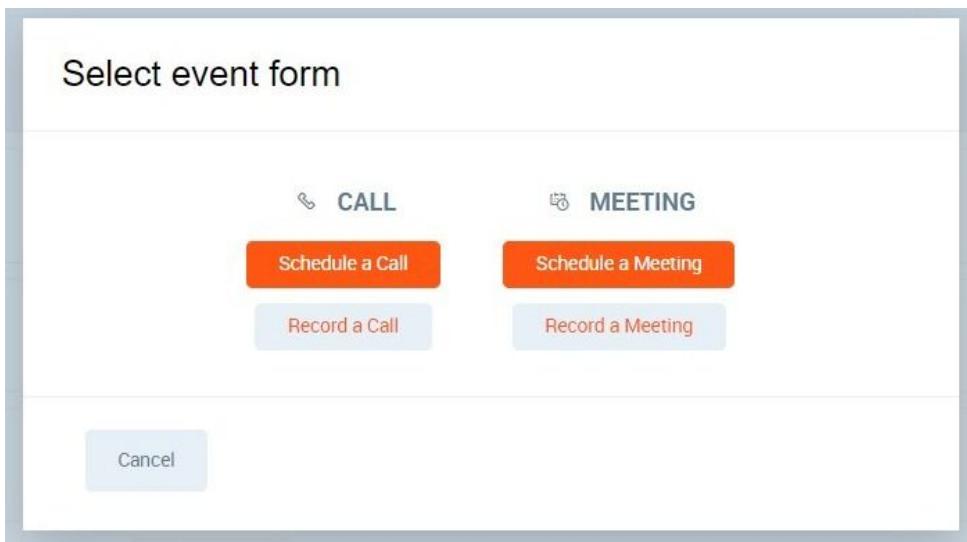
CRM 2.0 gives you the ability to arrange meetings and calls not only on Leads, but also on Guest and Members. It will allow you to improve your sales activities and general relationship tracking with your current customers.

The screenshot shows the PerfectGym CRM interface for a member named Paweł Budnik. The top navigation bar includes Profile, Contracts, Transactions, Data, Activity, and Communication. The top right shows Customer Number 102000135 (GUEST), phone +49 8809 886545, email hawasz.michal@gmail.com, and Perfect Gym 1.0. The main area displays a 'Health Check' section with 'No contract' and 'Point of Sale' status. Below this is a 'Payment timeline' section showing 'No Installments' for all payments. The 'Member contracts' section indicates 'No contracts'. The 'Events' tab is selected, showing two entries: 'Sales Meeting with michał.hawasz Creadhoc xyz' on 21.11.2019 at 16:48 with an outcome 'CONVERSION / SALE' and 'Inquiry Call with michał.hawasz Creadhoc xyz' on 21.11.2019 at 16:46 with an outcome 'NOT SET'. A 'Notes' section on the right contains a note about Paweł being a kickboxer.

Flexible Sales Process on Leads

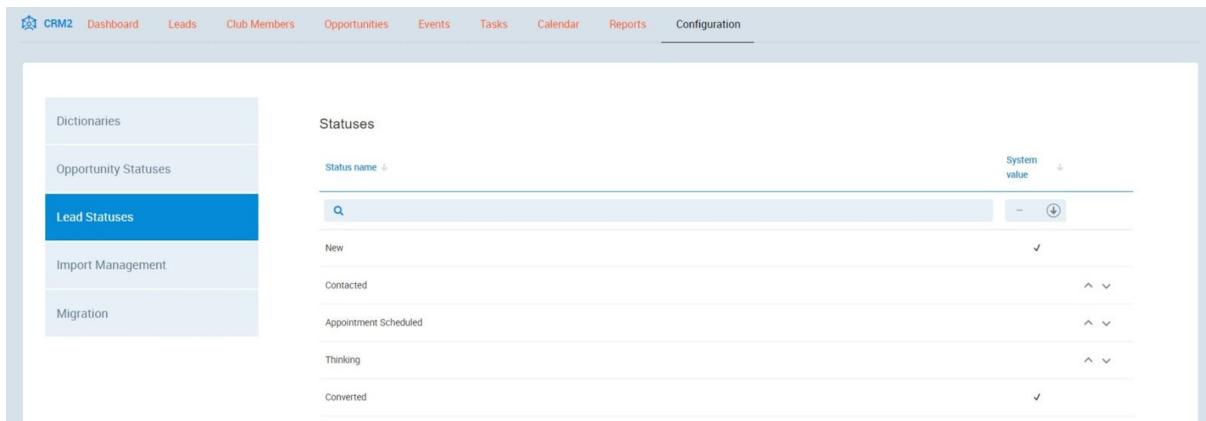
In CRM 2.0, you can manage the Lead process more flexibly; you are not limited to one predefined process. Instead, you can define Lead stages and their order according to your business process. In addition, you have more flexibility in terms of meetings and calls arrangements which can also be created ad hoc on Leads.

This will also resolve the funnel inconsistencies observed in CRM1.



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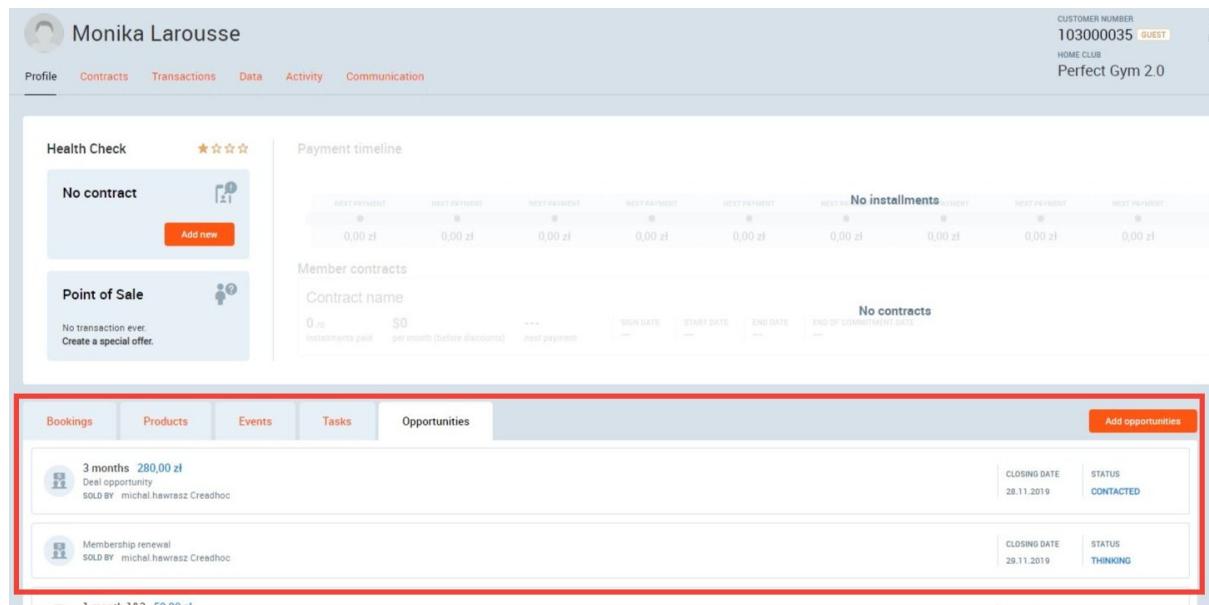


The screenshot shows the 'Lead Statuses' section within the 'Statuses' configuration. The left sidebar lists 'Dictionaries', 'Opportunity Statuses', 'Lead Statuses' (which is selected and highlighted in blue), 'Import Management', and 'Migration'. The main area displays a list of statuses with columns for 'Status name' and 'System value'. The statuses listed are 'New', 'Contacted', 'Appointment Scheduled', 'Thinking', and 'Converted'. Each status has a small dropdown arrow to its right.

Sales on Guest and Members Using Opportunities

CRM 2.0 allows you to track deals and transactions on current customers thanks to the **Opportunity** feature. Opportunities help you track potential deals, such as PT training, contract sales on club guests or contract renewals. Now all deals will be transparent in one single place that you can filter and report - no need to keep them in personal notes or event descriptions.

Opportunities together with calls and meetings can serve your club's needs for re-engagement and outreach campaigns.



The screenshot shows the customer profile for 'Monika Larousse' with the following details: CUSTOMER NUMBER 103000035, GUEST, HOME CLUB Perfect Gym 2.0. The top navigation bar includes Profile, Contracts, Transactions, Data, Activity, and Communication. The main content area includes sections for Health Check (No contract), Payment timeline (No installments), Member contracts (No contracts), and Opportunities. The Opportunities tab is currently selected and highlighted with a red border. It displays two opportunities: '3 months 280,00 zł' (Deal opportunity, SOLD BY michał.hawrasz Creadhoc) and 'Membership renewal' (SOLD BY michał.hawrasz Creadhoc). Each opportunity card includes fields for CLOSING DATE (28.11.2019) and STATUS (CONTACTED for the first, THINKING for the second).



Communication Log

The **Communication** tab shows all interactions your staff has had with a member in chronological order. It will help to resolve any issues you may have related to that person/member since you can easily identify the context.

Type	Subject	Consultant	Date	Status
Meeting	xxx	michel.hawrusek.Creedhoc	23 listopad 2019 13:43	
Meeting	xxx	michel.hawrusek.Creedhoc	21 listopad 2019 16:58	
Email	[AC] Send on-boarding email		14 listopad 2019 13:59	DeliveryFailure

Email & SMS

You can send email and SMS messages to your customers, including to Leads directly from their profile in the CRM. All these messages will be automatically tracked in the communication log.

Monika Larousse

CUSTOMER NUMBER
103000035 GUEST
HOME CLUB
Perfect Gym 2.0

Profile Contracts Transactions Data Activity Communication

Tasks

In CRM 1, tasks were categorized as meetings and calls. In CRM 2, meetings and calls are categorized as events and redefined tasks, which are formatted as to-do items. Tasks will help you to delegate specific work objectives to different people on the sales team that are not meetings and calls. For example, you can make a task for your sales consultant to schedule calls with members with expiring contracts. As a result, sales consultants will need to schedule individual calls (events) with these customers.



Michał Hawrasz

Profile Data Communication

Events Tasks

Prepare a report
TO DO BY michał.hawrasz Creadhoc

Prepare an offer
TO DO BY michał.hawrasz Creadhoc

Show more Add tasks

More Dashboards

In CRM2, we provide you with 3 types of dashboards:

- **Personal Dashboard:** shows achievements and today's calendar for the person viewing.
- **Lead Dashboard:** shows Leads stats and Lead funnel
- **Opportunity Dashboard:** shows Opportunities stats and Opportunities Funnel; for example, sales on Guests and Members.

CRM2 Dashboard Leads Club Members Opportunities Events Tasks Calendar Reports Configuration

My dashboard Leads Opportunities

FROM 01.02.2020 TO 29.02.2020

My Activities On Leads

- MY LEADS 0
- CALLS COMPLETED 0
- MEETINGS BOOKED 0
- MEETINGS COMPLETED 0
- CONVERSIONS TO MEMBERS 0
- CONVERSIONS TO GUESTS 0
- REJECTIONS 0

My Activities On Opportunities

- MY OPPORTUNITIES 0
- SALES 0
- REJECTIONS 0

My calendar

Friday 7 February

all-day

06:00 07:00

More Configuration Available

In CRM 2 you will be able to:

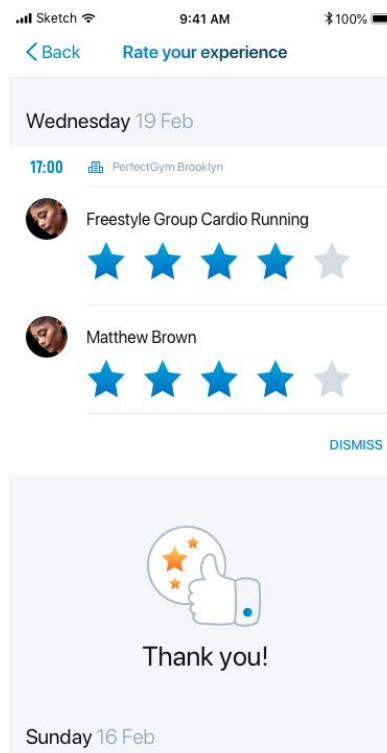
- Set required fields
- Set picklist values
- Configure Lead and Opportunity stages and funnels
- Configure calendar items by color
- Manage Lead import



Perfect Gym Go 2 - Mobile App

New Class Rating System

Users that participate in the classes can now rate them afterwards. The rating widget is placed directly below the upcoming classes. Detailed reports per class and trainer can be found in the **Studio Report** in the PGM.



New App Usage Widget

You can see the number of PGG2 app users within the last 30 days at a glance directly in the PGM dashboard.



Class Zones

Exact class zone is now visible for users in the class details.

Freestyle Group Cardio
★ 4.3 Perfect Gym Seattle
17:00 Dec 25, 2018
75 mins **Boxing Arena**

ABOUT THIS CLASS
45 minute class designed to release tension and lengthen muscles throughout your body. we spend the majority of class during the workshop on doing some important stuff... [Read more](#)

ALREADY SIGNED UP
+34

Max 120 people allowed at this class



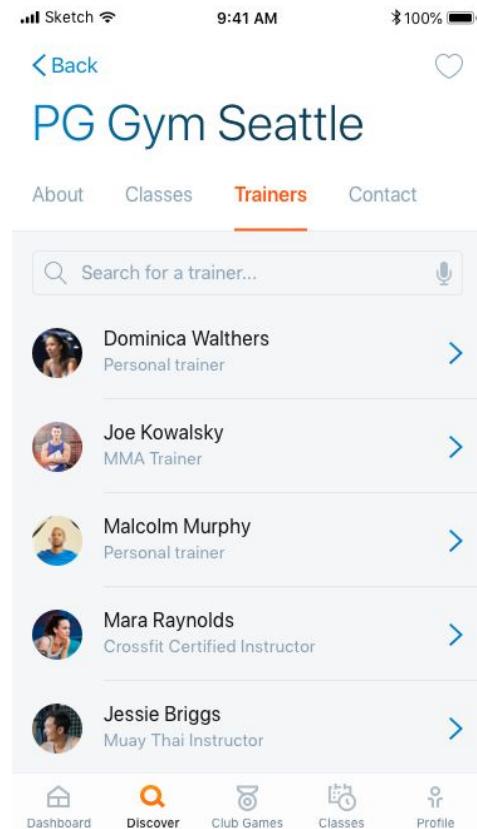
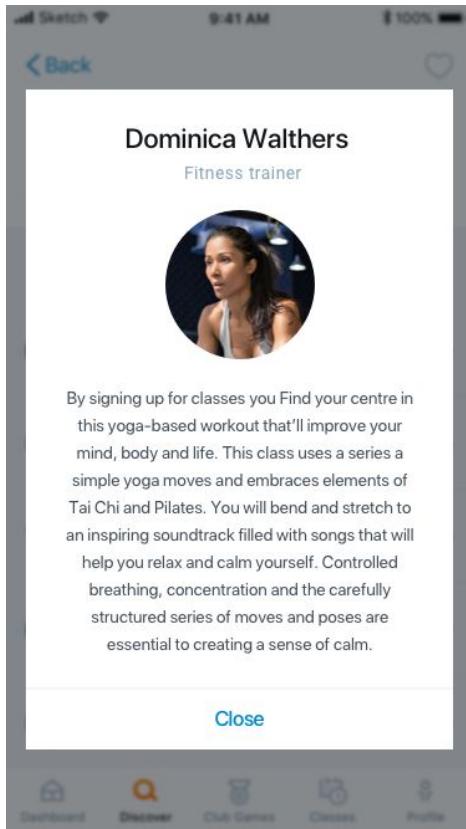
Open Classes

You can mark classes as open. That will remove the sign up button from class details in the app.

A screenshot of the PerfectGym mobile application. The top navigation bar has the title 'Book Classes' and a search bar with the placeholder 'Look for classes or trainers'. Below the search bar is a weekly calendar grid for December, with the current date 'Today 21 Dec' highlighted in blue. The calendar shows the following days: Monday 22, Tuesday 23, Wednesday 24, Thursday 25, Friday 26, Saturday, and Sunday. Under the 'Today' section, there are three class listings: 1. 'Morning Streching' at 9:00, 30 min, taught by Dominica Walthers from PerfectGym Brooklyn. The sign-up button is a red square with a white 'X'. 2. 'Fast Cardio™' at 9:30, 30 min, taught by Joe Kowalsky from PerfectGym Brooklyn. The sign-up button is a blue circle with a white 'X'. 3. 'Krav-Maga For Beginners' at 9:45, 30 min, taught by Matthew McMurphy from PerfectGym Brooklyn. The sign-up button is a red circle with a white plus sign. Each class listing includes a small icon of two people.

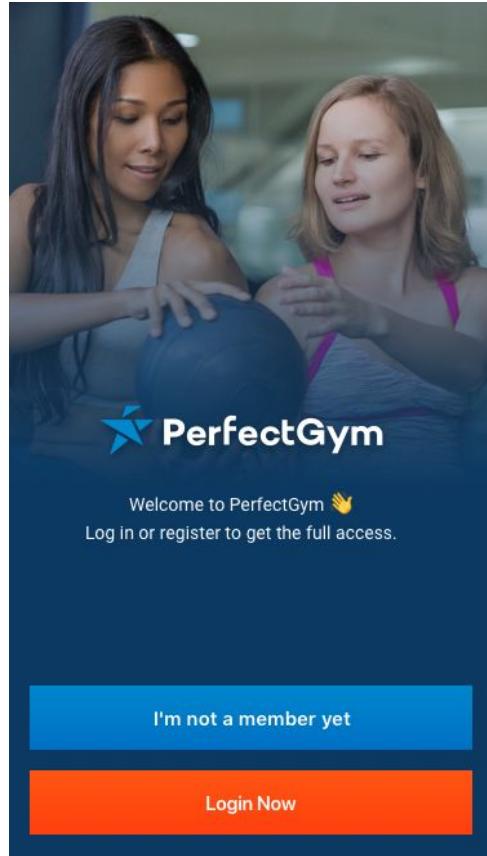
Trainer Details

You can now see the trainer's description (from PGM) from class details and trainer's tab in the club details.



Online Joining

If your club has the Client Portal and you are using the white label app, then new app users can join via the Client Portal. They can start in the app by selecting: "I'm not a member yet"



Products Payments

Customers can pay for products and services directly from the app and monitor usage. For example, if a client purchased a pack of 10 personal training sessions, the app will show how many trainings have been used/remain.



Sketch 9:41 AM 100%

Back Products & Services

Available items

Bought items

Select club:

PG GYM San Diego

SERVICES

10x Private Training

Many desktop publishing packages and web page editors now use Lorem Ipsum as their default model text, and a search.

\$100.00

Buy now

PRODUCTS

Vanilla Milk Shake

It is a long established fact that a reader will be distracted by the readable content of a page when looking at its layout.

\$999.00

Buy now

Performance Improvements

We have improved app loading speed through better management of data synchronization, especially in the categories of club details and classes.

Membership Search Improvements in the Perfect Gym Go App

We have improved the membership search function so that finding app users' memberships is easier. In addition, you can troubleshoot the search in the POS here:

Sketch 9:41 AM 100%

Back Products & Services

Available items

Bought items

ACTIVE PRODUCTS

Personal Trainings pack

- 3 / 10 uses left
- Active until 1 month from first use
- Bought in PG GYM San Diego
- Bought on 11 Feb 2018

Private Locker

- Active until 23 May 2018
- Bought in PG GYM San Diego
- Bought on 11 Feb 2018

HISTORIC PRODUCTS

Vanila Milk Shake

- Bought in PG GYM San Diego
- Bought on 11 Feb 2018



The screenshot shows the PerfectGym software interface. On the left is a sidebar with a user profile for 'Mari Franklin' (ID 104001029), a 5-star rating, and icons for Payments, Contract, and Shopping. The main area is titled 'Information' and shows member details: 'Mari Franklin', 'Tags: Club', 'Membership: Comfort', 'Contract start date: 14 Feb 2020', 'Available freeze days left: 0 Days', and 'Payment method: Credit Card (change) (pay your contract)'. A red box highlights a message: 'Mobile application Member doesn't use mobile application [Resolve](#)'. A blue 'Edit' button is at the bottom right.

Automation Center

Template Editor

In **Automation Center -> Email Templates**, you will find an option to **Add Configurable Template**, which will allow you to create a nice and clean email template for your communication. You can easily add a customized logo, image, footer and button for your website instead of creating HTML template.



Client Portal

New Payment Tab in Perfect Gym

Moving forward, we have changed how members can update their payment sources in Perfect Gym. It is now easier to manage multiple credit cards or bank accounts.

Possibility to Pay POS Debt on CP

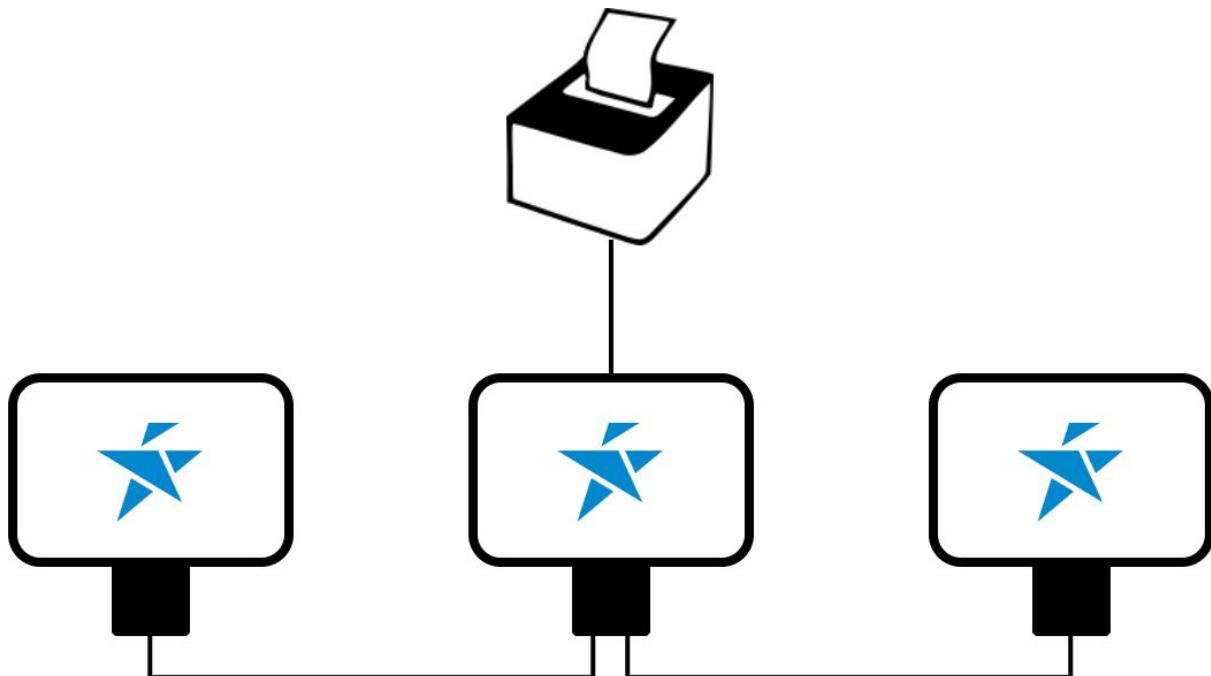
There is a new feature in the system that allows members to pay for goods and services purchased through Points Of Sell (as debt) in Client Portal. The customer can pay the debt by him/herself. Products purchased at POS are located at the top of the list in Client Portal, which means that the debt payment must be settled first.

As another feature, there is also the possibility to pay debt for family members - in such case, **Family & Friends** should be turned on.

The functionality is available to everyone by default from version 79 in Client Portal, at **Payments** tab. To use it, clients should be allowed to have debt.

POS

Universal Print Server



This new feature allows one fiscal printer for many POS stations. One of the POS stations acts as a print server with a connected fiscal printer. It will reduce the cost of equipment.

In practice, the POS station will send a print receipt request to a server. All local receipts data will be stored in a database located in a print server workstation. Requests are managed by a DI's internal print queue.

The functionality is available to everyone by default from version 79.

Facility Booking Available in POS Application

Now, receptionists will have access to a convenient POS solution for managing facility bookings reserved within the club

Upcoming bookings:



- Receptionists will have an overview of all people who placed a facility booking for a chosen day, accompanied by quick access to all important actions that can be performed on a user's booking. The **Upcoming Bookings** list will catalog users coming from different sources, like client portal, e-commerce, PGM or POS. Staff will also be able to oversee the current capacity of the facilities along with a list of people who are currently using them.

Book a facility:

- If your clients don't want to book facilities online, they can also do it on-site. Receptionists will be able to place a booking and collect payments.

QR Code Access Control

POS application can work with compatible QR code scanners and Perfect Gym Go mobile app to allow member entry to gym without a member card.

Integrations

ClassPass

Our clients are now able to offer their class schedules created within PGM on ClassPass's platform through our new integration. As a result, gym managers can now manage their class schedules and ClassPass appointments within our system - there is no need to maintain two separate schedules. Your staff will be able to associate users attending a single class both from PerfectGym environment (Client Portal, POSWeb and other applications) and from ClassPass.

API

New endpoints will appear in our API:

1. Access control API that allows for 3rd party device integrations
2. Member visits queries
3. Member tags

Facility Booking

E-commerce

The E-commerce Module is a great tool for businesses that commonly rely on facility rental services such as:



- Gyms
- Trampoline parks
- Tennis courts
- Rock climbing facilities
- Swimming pools
- Squash courts
- ... and much more!

E-commerce is a client-facing application that lets club owners create online shopping journeys for their clients. Clients entering the e-commerce app can go through an end-to-end process of a facility booking and specify their exact booking requirements such as:

- place of the event
- date of the event
- start time
- duration

Upon successful entrance configuration, the user may be offered additional products that increase the value of his/her cart. As the final step, he/she can pay for the booking and receive automated communication that confirms the reservation and payment.

The e-commerce module is fully integrated with our advanced facility management tools available within PGM and POSWeb, which lets you to manage the user's whole journey - from the time the booking is placed to the moment the guest arrives at your facility.

Legal/Regional Adjustments

SCA/PSD2 adjustments [Europe]

Perfect Gym introduced for each payment provider Strong Customer Authorization. It means that clients in Europe need to additionally authorize the cards.

NIP on receipts [Poland]

According to Polish Law, if a customer would like to receive a business invoice, the club needs to put "NIP number" on the receipt during purchase.



SportID integration [Estonia]

Members can pay for their membership using a SportID account.

OK System Integration [Poland]

Members with OK System account can go through turnstiles without need of registering visit at the front desk

Fiscalization changes [Russia]

Introduction of new fiscal requirements on receipt printers in Russia with “payment purpose” functionality and integration of OrangeData fiscalization service for online purchases

EFT POS integration [Australia]

We have integrated a common interface for payment terminals for the Australian market. Currently employees can serve customers faster with less mistakes.

PayFort payment provider [MENA]

Clients located in the Middle East can use PayFort payment gateway for online and recurring transactions.

Omise payment provider [Thailand]

Clients located in Thailand can use Omise payment provider for online and recurring payments.