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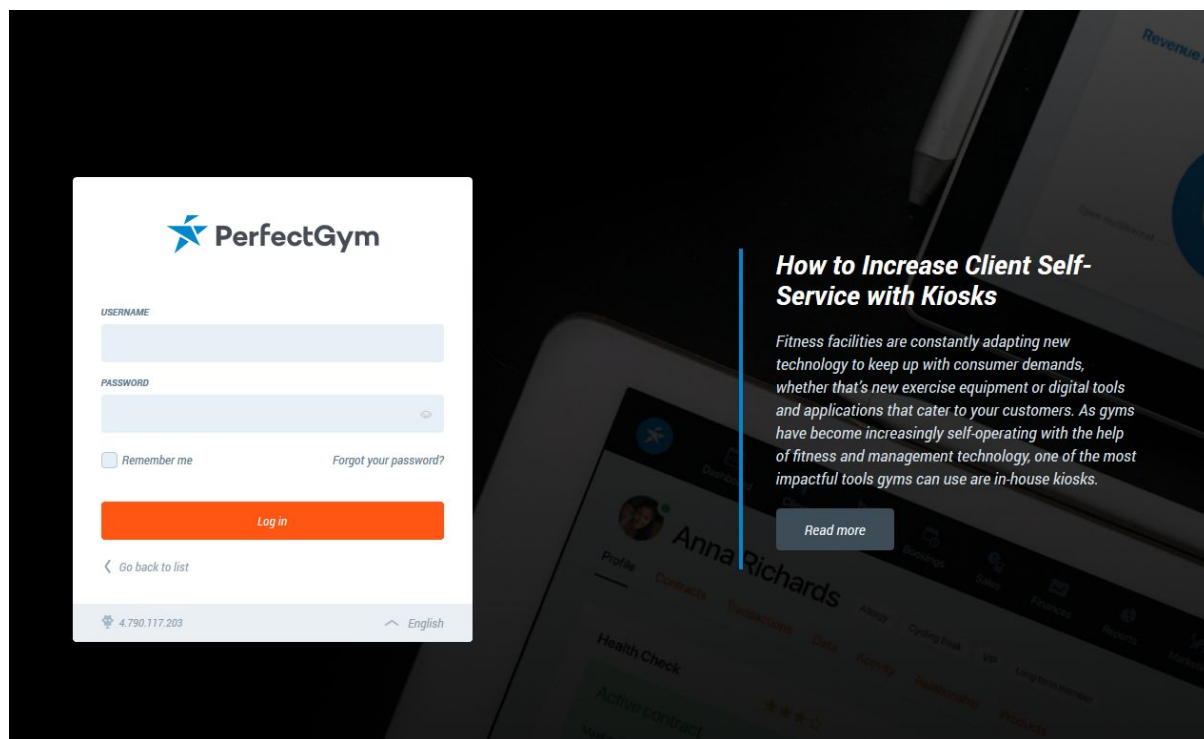


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Perfect Gym Manager

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.

Club members

Number	Name	Surname	Club
12000003	Edyta	Kowalska	Egumda
12000096	Jarek	Jakobson	Egumda
12000002	Mika	Tyson	Egumda
34500003	Jarek	Black	Egumda
12000001	Edyta	Brzezka	Egumda
34500002	Eren	Eren	Egumda
12100187	Zofia	Kowalska	Egumda
12000095	xxx	xxx	Egumda
34500001	Marysa	Kowalska	Egumda
12000094	maria	swiska	Egumda
12100186	Edyta	Brzezka	Egumda
12000003	Kamil	Kowalski	Egumda
12000092	xxx	xxx	Egumda
12000091	Edyta Brzezka	Brzezka	Egumda
12000090	Sebastian	Szalchowski	Egumda
12400028	Test	Test Test	Egumda
12000082	Onoide	Test	Egumda
12000021	Charles	Garvin	Egumda
12400027	Jaydhn	Jhgerf	Egumda
106000020	test	test	Egumda

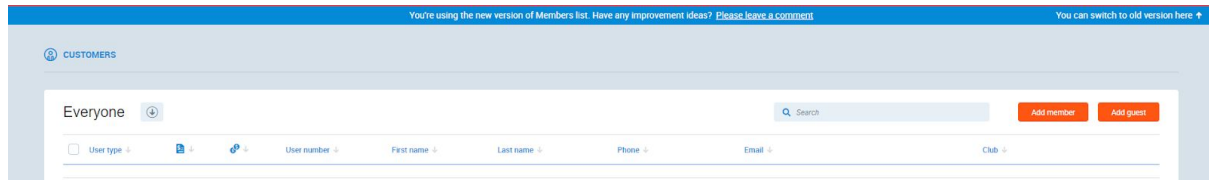
No, use current version **Yes! Try the new one**

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

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:



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)

Visits per member Все клубы ↓ Club member ↓



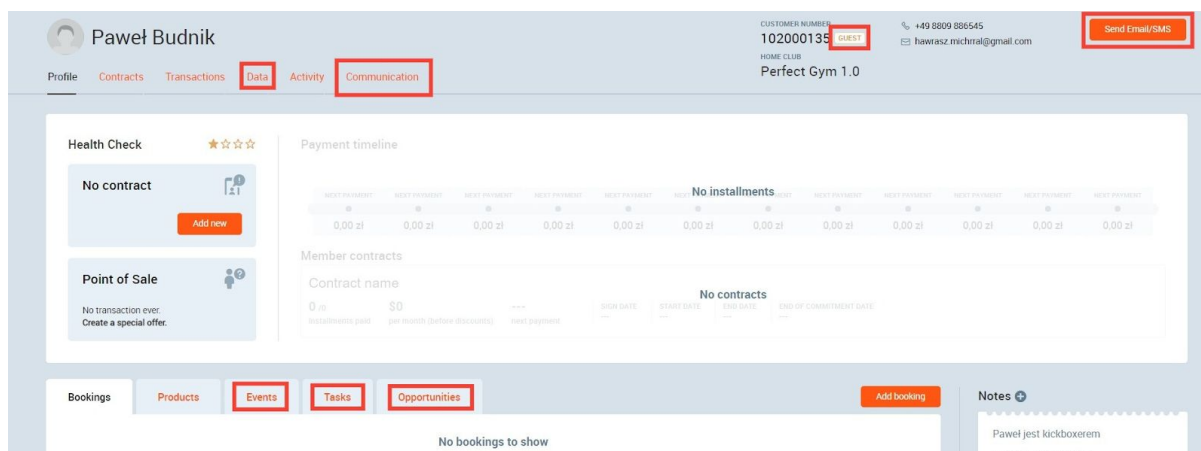
- No visits (19%)
- Between 1 and 2 (22%)
- Between 3 and 6 (20%)
- Between 7 and 12 (19%)
- More than 12 (19%)

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.



Customer 360 View for Pawel Budnik

Profile Card: Pawel Budnik, CUSTOMER NUMBER: 102000135, HOME CLUB: Perfect Gym 1.0, CONTACT: 49 8809 886545, hawrasz.michal@gmail.com. Buttons: Send Email/SMS.

Data Tab:

- Health Check:** No contract (Add new), Point of Sale (No transaction ever, Create a special offer).
- Payment timeline:** No installments. Table with columns: NEXT PAYMENT, AMOUNT, DUE DATE. All amounts are 0,00 zł.
- Member contracts:** No contracts. Table with columns: CONTRACT NAME, INSTALLMENTS PAID, PER MONTH (before discounts), NEXT PAYMENT, ORDER DATE, START DATE, END DATE, END OF COMMITMENT DATE.

Bottom Navigation: Bookings, Products, Events, Tasks, Opportunities. Events tab is active, showing 'No bookings to show'. Add booking button.

Notes: Pawel jest kickboxerem, michal hawrasz Creaditor.



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.

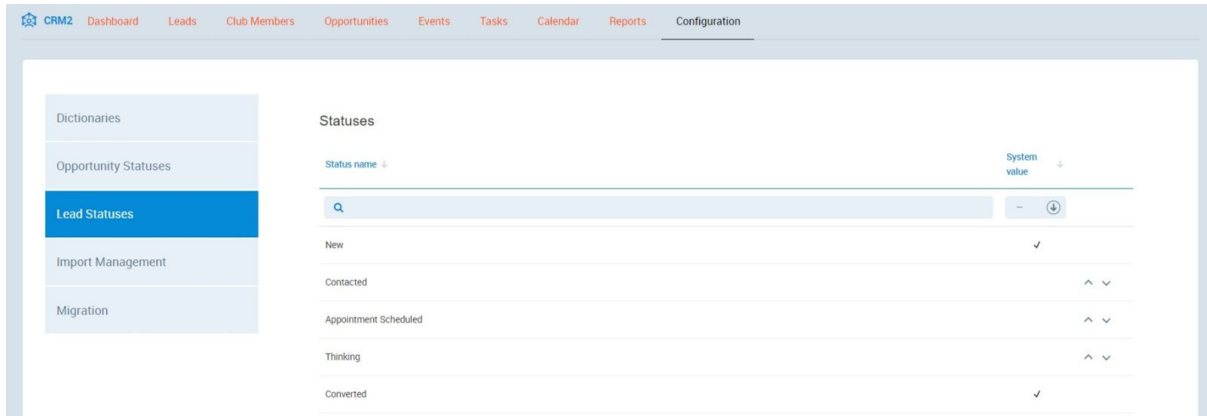
The screenshot displays the CRM 2.0 interface for a member named Paweł Budnik. The top navigation bar includes links for Profile, Contracts, Transactions, Data, Activity, and Communication. The main content area is divided into several sections: Health Check (No contract), Payment timeline (No installments), Member contracts (No contracts), and a list of bookings. A red box highlights the 'Bookings' section, which shows two entries: 'Sales Meeting with michał hawrasz Creadhoc' and 'Inquiry Call with michał hawrasz Creadhoc'. The 'Notes' section on the right shows a note about a kickboxer event.

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.

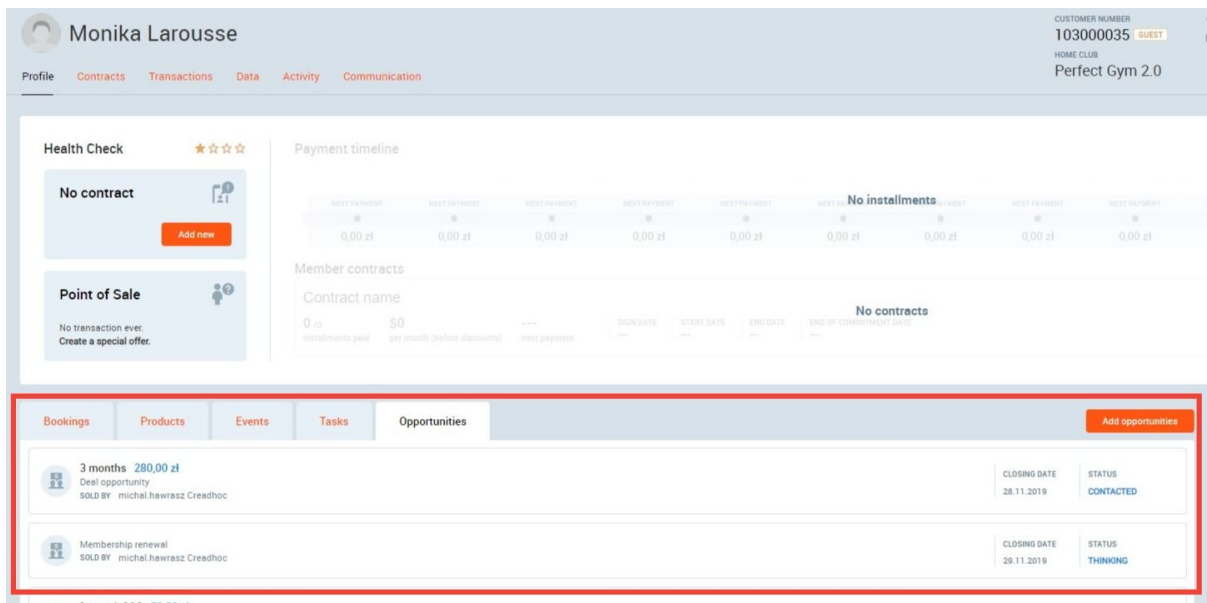
The 'Select event form' dialog box provides options for scheduling or recording calls and meetings. It features two main categories: 'CALL' and 'MEETING'. Under 'CALL', there are buttons for 'Schedule a Call' and 'Record a Call'. Under 'MEETING', there are buttons for 'Schedule a Meeting' and 'Record a Meeting'. A 'Cancel' button is located at the bottom left.



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.





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.

The screenshot shows the 'Communication' tab for a member named Monika Larousse. The header includes the member's profile, contact information, and a 'Send Email/SMS' button. The main area displays a table of communication events.

#	Type	Subject	Consultant	Date	Status
1	Meeting	xxx	Michał Haweż Cieschoc	23 listopada 2019 13:43	
2	Meeting	xxx	Michał Haweż Cieschoc	21 listopada 2019 16:58	
3	Email	[AC] Send on-boarding email		14 listopada 2019 13:59	Delivery Failure

At the bottom, there is a 'Refresh' button, pagination controls showing '1' of 1 page, and a '10 rows per page' dropdown.

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.

This screenshot shows the top section of the CRM profile for Monika Larousse. The 'Send Email/SMS' button is highlighted with a red rectangle. The header also displays the member's contact details and a 'Communication' tab.

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.



← Leads
Michał Hawrasz

Profile Data Communication

CUSTOMER STATUS
LEAD
+48 880 988 650
hawrasz.michal@gmail.com

CLUB ASSIGNED
Perfect Gym 2.0

Events Tasks Add tasks

Prepare a report
TO DO BY: michal.hawrasz Creadhoc
DUE DATE: 27.11.2019
PRIORITY: LOW

Prepare an offer
TO DO BY: michal.hawrasz Creadhoc
DUE DATE: 27.11.2019
PRIORITY: MEDIUM

Show more

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

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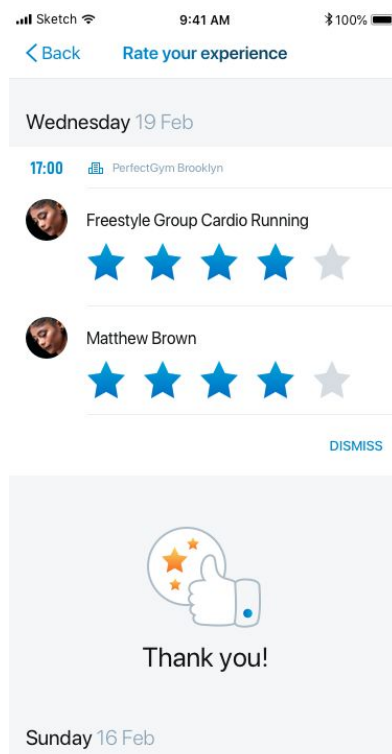
Phone: +48 22 252 63 64 | E-mail: contact@perfectgym.com, NIP: 951-238-78-11, REGON: 360716544



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.



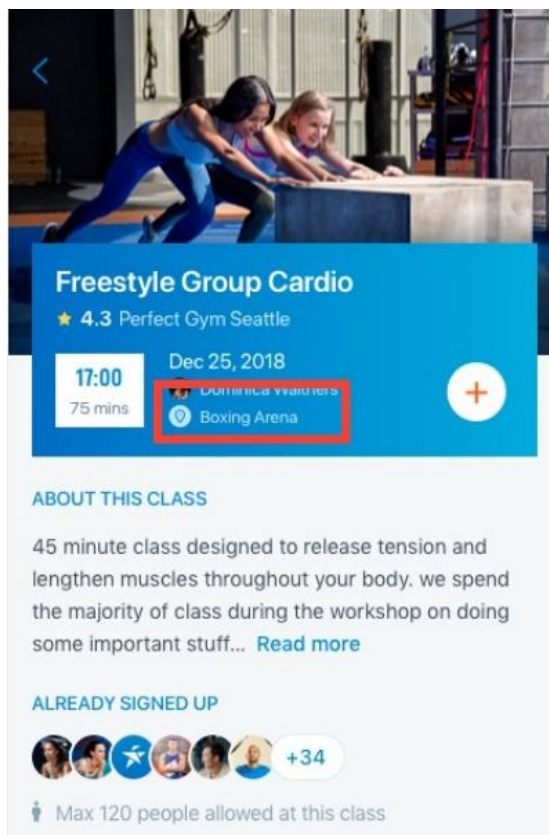
New App Usage Widget

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
75 mins


Dec 25, 2018

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](#)

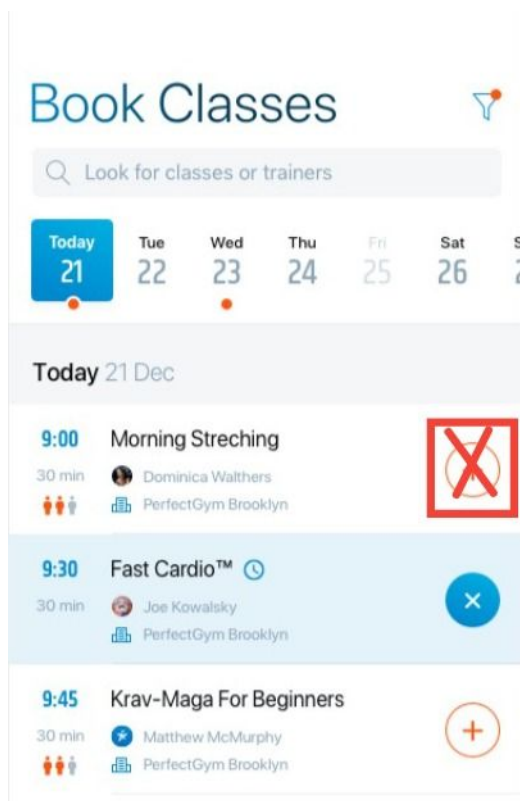
ALREADY SIGNED UP

 +34

Max 120 people allowed at this class

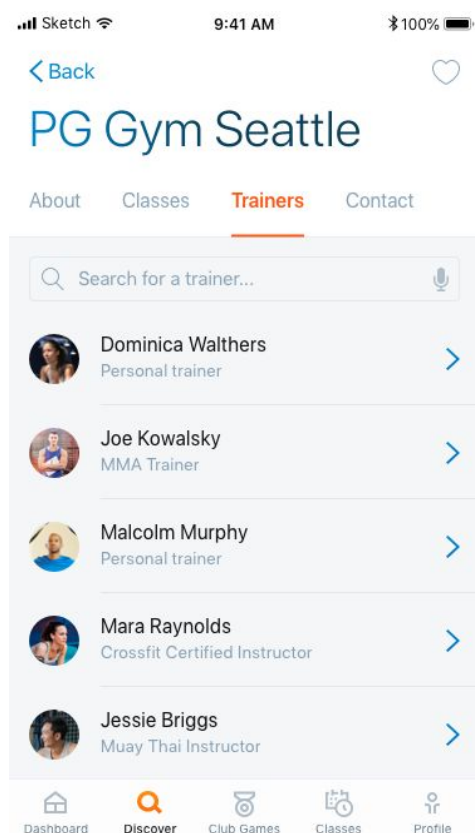
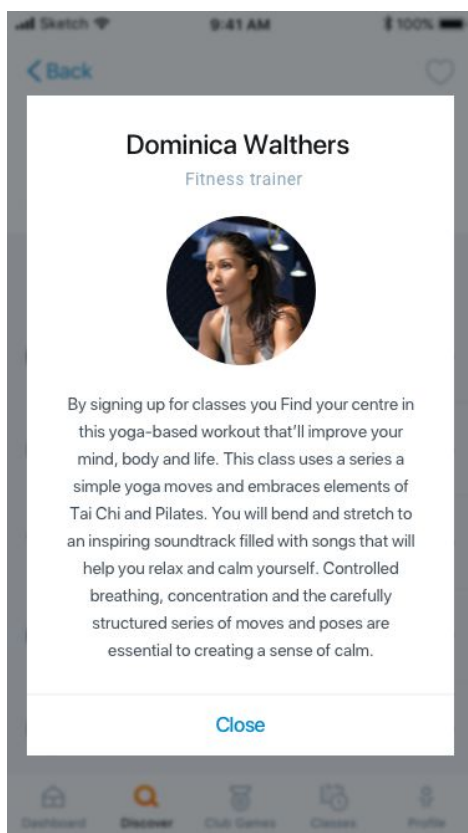
Open Classes

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



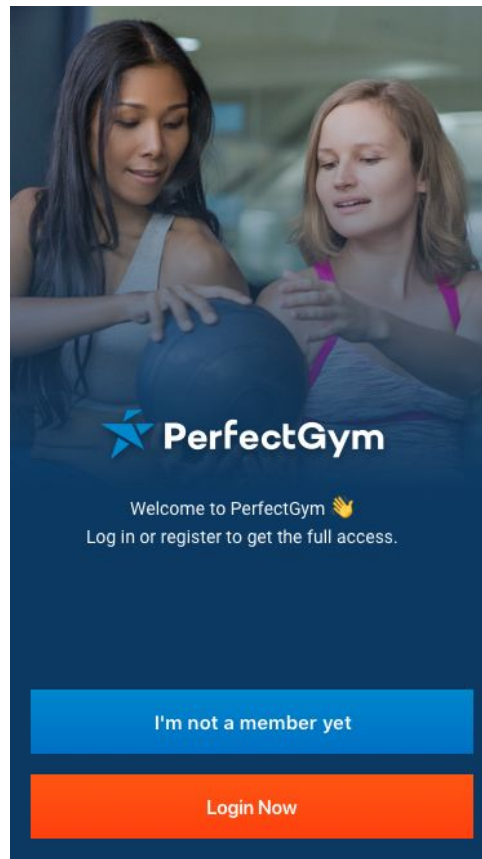
Trainer Details

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



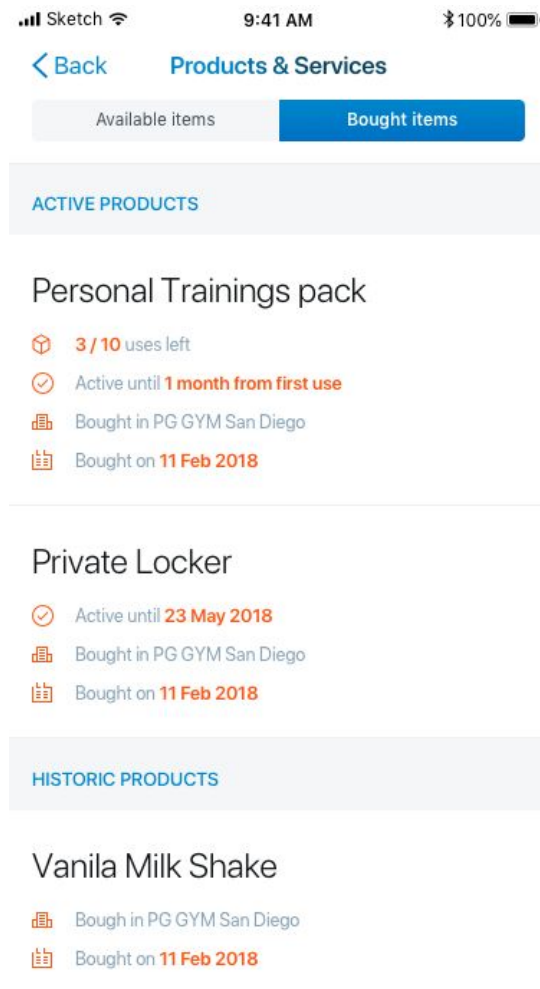
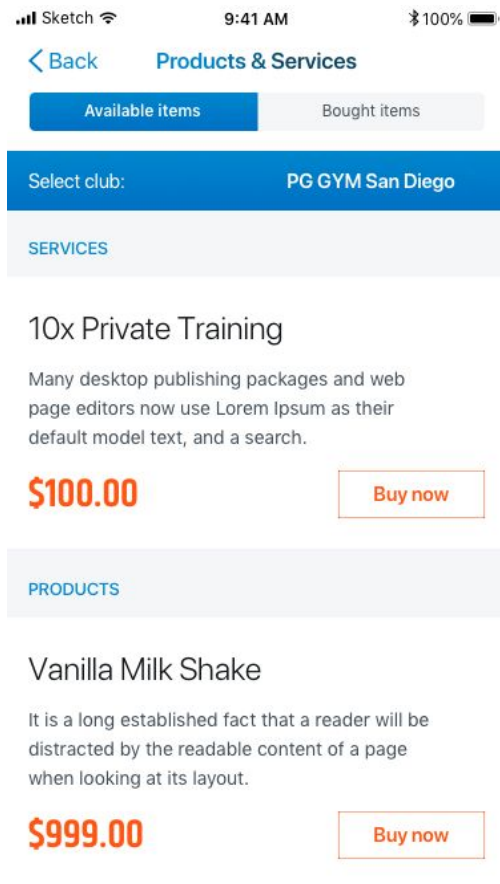
Online Joining

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.



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:



Information Membership and marketing Personal Custom Attributes

Mari Franklin

Tags:

Club: [redacted] Payment method: Credit Card (change) (pay your contract)

Membership: **Comfort** Payment plan: [redacted]

Contract start date: 14 Feb 2020 Contract expiration:

Available freeze days left: 0 Days Current contract freeze:

Next contract freeze:

Mobile application: Member doesn't use mobile application [Resolve](#)

[Edit](#)

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

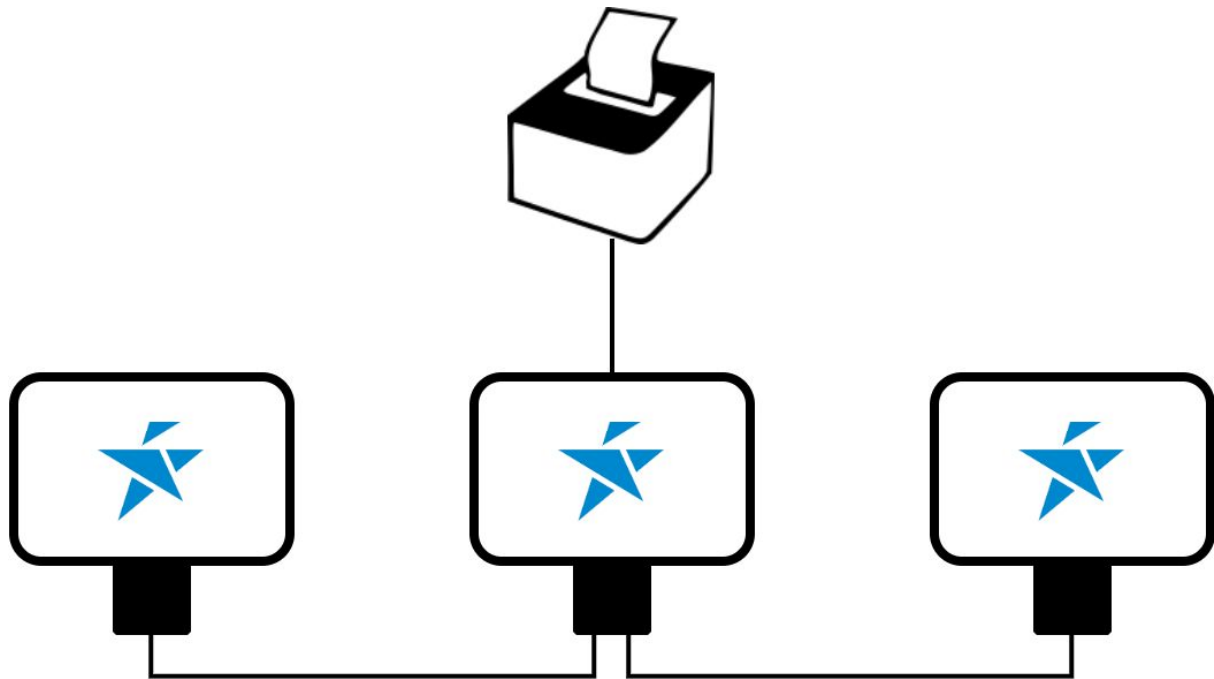
There is a new feature in the system that allows members to pay for goods and services purchased through Points Of Sell (as debt) in Client Portal. The customer can pay the debt by him/herself. Products purchased at POS are located at the top of the list in Client Portal, which means that the debt payment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