

A. Users

1. Users details

■ Contracts

- Freezes
 - Past freeze - allows to add freezes with the past date
 - Edit - editing dates and amounts in active or inactive freeze
 - Add - adding freeze
 - Delete - deletes freeze
 - No minimum time limit - adding freeze with no end date
 - Add for contracts in debt - adding freezes to contracts / members in debt
- Cancel contract
 - Immediate cancel - allows to finish the contract on a given day without additional fee
 - Simple cancel - allows to introduce the resignation
 - Revert cancel - to cancel the resignation
 - Allow to enter cancel date - to introduce the resignation with the specified date
 - Cancel with voucher - allows introduce the resignation with the percentage penalty fee specified in the regulations
 - Cancel contract in debt - allows to introduce the resignation on the indebted contract
 - Always show all cancel options - permission that allows to display various options for membership cancellation, eg. ending with a past date / ending with a voucher / immediate termination of the contract
 - Show Money Back cancellation
 - Move and date - allows to edit contract end date
 - Cancel for resignation letter - the option of entering a resignation by the 5th day of each month with the date back to the last day of the previous month
 - Override early termination fee - to generate a fee for early termination of the contract. The amount will appear on the customer's profile
- User transfer
 - Execute - permission allows to transfer a client (this permission must be granted in order to get an access to other transfer related actions)
 - Cancel user transfer - permission that allows cancelling the transfer already entered however only before the transfer start date
 - The ability to transfer to a club in another city - permission allows transfer to the club in another city with different or the same payment plan
 - The ability to transfer to a club to be opened in the future
- View - allows to view PP (contracts) signed by a given client
- Edit - allows editing contract basic data as well as payment plan
- Add
- Free - allows to add free memberships
- Skip contract start date limit - allows modifications of the contract start date (may be past date)
- Recalculate contract - permission enabling recalculations of membership (payment) when ambiguities arise
- Delete - allows membership removals
- Edit cancelled - allows change of data and payment plan in cancelled contract
- Choose prorata algorithm - allows adjusting the pro rata to the selected payment plan, eg. daily / weekly / 100% membership fee / free / default
- Edit min contract time - allows changing the minimum duration of the contract
- Upgrade all - allows adding new, upgraded payment plan
- Cession - allows to transfer membership to another person
- Cession after commitment date - do not use it!
- Set past start date
- Set past sign up date

- Assign voucher - allows assigning the voucher to someone else than the person it was originally assigned to
- Set future start date
- The ability to edit members from all clubs - allows editing members from all clubs
- Access rules unrelated to payment plan
- **Additional services**
 - View
 - Edit
 - Add
 - Delete
 - Add Ons edit - permission that allows you to edit the selection of additional services in the existing payment plan eg. set of towels, locker rental etc.
- **Card swipes**
 - Blocked cards
 - Add
 - Edit
 - Delete
 - View
 - Delete
 - Card swipes - all keys command
 - Add visits
- **Contract transactions**
 - Delete – allows deletion of the contract transaction that was added manually
 - Can delete with reason from list
 - Can delete with custom reason
 - View – permit viewing contract transaction page
 - Add – allows to add manual transaction
 - Allow custom description – permission to add note/description in contract transaction that was added manually
 - Charge month fee – allows to check if the next payments on the customer profile will generate correctly
 - Edit transaction – allows editing of the contract transaction that was added manually
 - Recalculate settlements – allows to check whether the added transaction will make the correct changes to the client's contract
 - Charge new month fee and pay– permits to generate additional fee and charge the client
 - Change payment type– permission for changing the payment method, for example from CC to DD / from DD to CC or for cash payment
 - Club select when adding transactions – allows to choose any club (if there is more than one) when adding transaction
 - Refund – allows entering a return for a given customer
 - Marks as deposit (to be deleted)
 - Deposit settlements (to be deleted)
- **Interactions (inserting commentary on the customer profile)**
 - View
 - Add
 - Detail interaction edit
 - Show delated
- **Change log**

- View (allows previewing the changes made on the client's contract)
- **Product status (allows to preview the status of products currently available in the club / clubs)**
 - View
 - Edit
 - Delete
 - Skip daily limit for user product state
 - Edit/Delete product state
 - Allow to change use date
 - Allow to use expired products
 - Transfer
 - Assign default employee to product
 - Change default product employee
 - Use product with employee other than default
 - Use product at reception desk
- **POS Transactions** (transactions initiated in POS eg. payments for products, water, towels)
 - Delete – deletion of the transaction that was added manually and is not visible on the fiscal report
 - Can delete with custom reason -allows providing any reason for deletion (Administrative tools -> Dictionaries -> Add)
 - Can delete with reason from the list
 - View – allows viewing “POS Transaction” tab
 - Add manual purchase – allows adding POS Transaction manually
 - Detail pos delete – don't use – it is not possible to delete POS transactions
 - Deposit or payment cash
 - Mark to print
 - Change payment type - gives the choice of payment options (cash, card, transfer, online)
 - Edit transaction – allows editing the transaction
- **Transfers** – allows to transfer user between clubs. This functionality allows you to:
 - View
 - Edit
 - Delete
 - Add
- **Cash less**
 - Delete options
 - The reason of the delete cashless payments
 - The custom reason of the delete cashless payments
 - View
- **Payment gate orders**
 - View
 - Delete
 - Add
- **User Files**
 - View user's documents
 - Adding a user's documents
 - Edit the user's documents
 - Deleting a user's documents
 - Uploading user's documents
 - Send files to user

- Bookings – the ability to enter and check booking for fitness classes by a given client
 - View
 - Edit
- Payment sources – functionality enabling adding/updating the method of payments selected by customer
 - Add
 - Edit
 - Delete
- General view
- Print agreements
- Detach all members cards
- Change member cards limit
- Booking event block edit – allows to remove, add or move the blocking on class bookings
- Send notifications – the ability to send information to the user, eg regarding debt
- Set member password – allows to set the password for customer
- Login to membership portal
- Exclude from e-payment edit – to introduce an exclusion from automatic collection on a given day, if, for example, the client has already paid
- View user levels
- Generate ended contracts documents

2. Payment methods

- Corporate customer
- Other user
- Discard card usage limit
- Discard bank account usage limit
- Credit card number change
- Ignore payment methods check

3. Edit – functionality responsible for editing the customer profile in PGM

- Required fields
 - Do not require Personal ID
 - Do not require TAX ID
 - Omit personal id uniqueness
 - Omit email uniqueness
 - Omit mobile phone number uniqueness
- Edit all data – allows editing
- Edit only basic data – allows editing basic data only (name, family name, address)
- All clubs – allows editing customer data not only from the home club but also from other clubs belonging to the chain
- Active / not active – allows deactivating and reactivating the club member (setting the blockade on CP, blocking the possibility to pay membership fee, blocking the possibility to book classes)
- Change consultant assigned to home club - allows edition of the consultant who concluded the contract with the client (the consultant must have a club assigned in which the contract was registered otherwise will not appear in the selection bar)
- Change consultant from all employees – assigning a consultant in the client's profile
- Edit financial data on basic edit mode – introducing or editing the basic payment method
- Remove auto assigned start packages – removing automatically added start packages from the customer's profile on basic edit
- Benefit – marking membership

- Edit Family and Guests data on basic edit mode – Adding and editing the Family/Guests data
- Manual edit card number – editing manually the payment method
- Edit corporate clients basic data – adding a company to the customer's profile
- Edit users agreements – editing the company data in the customer's profile
- Omit marketing agreements edit lock – bypass the requirement to mark marketing consent
- Edit legal guardian – editing legal guardian data on client's basic edit
- Edit required user agreements – editing marketing consents on client's basic edit
- 4. **Custom attributes** – permission to add additional data on customer's basic edit
 - Edit
 - View
- 5. **View** - permission to view client data
- 6. **All clubs** – access from the system level to more than one club
- 7. **Add** – adding users in PGM
- 8. **Delete** – allows to remove previously added user in the PGM system
- 9. **View not active** – visibility of inactive users and viewing their contracts
- 10. **Add guest** – adding guest in the PGM system (single entry, etc.)
- 11. **Bring temporarily rejected automatically to pending** – changing the status of the rejected contract to not accepted
- 12. **View sensitive data**– view of the payment card number or bank account number data
- 13. **View sensitive data of members owned by employee**
- 14. **Sign in member for other club** – in the case when the client has access to more than one club, the consultant may choose a club in given payment plan from the list of all available for this client

B. System administration

1. Employees

- Club information– access to the Club Information tab where the employee can navigate areas such as: viewing, editing, adding and deleting
 - View
 - Edit
 - Add
 - Delete
- View
- Edit
- Add
- Delete
- Add to any club– adding an employee to a selected club if there is more than one
- Edit of employee name and login - editing the login and employee's name
- SystemManEmployeesManageExtendedRoles– an employee has the option of entering a department in the PGM system
- SystemManEmployeesDepartments – the employee has access to the System Permissions tab

2. Clubs

- Employee description– access to marketing tab
 - View
 - Add
 - Edit
- Club information– access to list of clubs tab where the employee can:

- View
- Club photo gallery– access to edit club tab as well as the gallery
 - View
- View
- Edit
- Add
- Delete
- Point of sales (POS)– access to Point of sales tab
- Club products prices– ass to list of products and fees list in PGM
- Warehouse products
- Articles– access to Articles tab in Marketing
- Dashboard
- News
- Categories for news
- View all clubs – can view all clubs, if unchecked then only assigned clubs will be visible

3. Access rules– access to Access rules tab

- Additional services
 - View
 - Edit
 - Add
 - Delete
- View
- Edit
- Add
- Delete
- Ignoring fingerprint validation– omitting the assignment of a fingerprint

4. Payment Plans

- Payment plans intervals – access to Payment plans interval tab where the user has the following options:
 - View
 - Edit
 - Add
 - Delete
- View – view only access to created payment intervals
- Edit – editing created payment intervals
- Add – creating new payment intervals
- Delete – deleting already created intervals
- Adding a new payment plans – adding a new payment plan based on the previously created "Save as new" plan.
- Saving payment plans without recalculate – editing and payment plans created and used by clients, and saving it without making changes to users' attached to this payment plan
- Description edit

5. Warehouse – access to warehouse tab where we can navigate such areas as:

- Warehouse documents :
 - View
 - Edit
 - Add
 - Delete
 - Cancel warehouse documents
 - Warehouse documents corrections
 - Edit price in warehouse outgoing documents
- Companies – access to the company's data tab where we can navigate the following areas:
 - View
 - Edit

- Add
 - Delete
- Warehouse reports – access to Warehouse tab where we can check::
 - Warehouse state
 - Product state in warehouses
 - Warehouse in out
 - Warehouse state change
 - Warehouse documents summary
 - Warehouse age
 - Warehouse income
- Warehouse inventory
 - Warehouse inventory view
 - Warehouse inventory edit
 - Companies
 - Inventory history
- Warehouses
 - View
 - Add
 - Edit
 - Delete
- 6. **Products**– access to Products tab and the following options:
 - View
 - Edit
 - Add
 - Delete
 - Adding a new products
- 7. **Employee positions**– access to Employee positions tab and access to adding a given position assigned to selected employees:
 - View
 - Edit
 - Add
 - Delete
- 8. **Cities**
 - View
 - Edit
 - Add
 - Delete
- 9. **On-line contracts** – access to memberships created via the CP2 portal or mobile application (so called on-line contracts):
 - View
 - Edit
 - Add
 - Delete
- 10. **Corporate customers**– access to Corporate customers tab a ability to create corporate membership
 - Corporate offer – ability to enter an offer assigned to a given company
 - View
 - Edit
 - Add
 - Delete
 - View
 - Edit
 - Add
 - Delete
 - Add corporate client
 - Login to the corporate clients portal - access to corporate portal
- 11. **Reports subscription**– downloading from users and cataloging the data stored in reports

- View
- Add

12. Calendars – access to Calendar tab

- View - calendar view permission
 - All
 - Only self
- Edit – calendar edit permission
 - All
 - Only self
 - Edit products
- Add – adding items to the calendar
 - All
 - Only self
- Delete - deleting items
 - All
 - Only self
 - Completed
- Schedule availability – access to schedule availability tab with the following functionalities:
 - View self
 - Add self
 - Edit self
 - View other employees
 - Add for other employees
 - Edit other employees
 - Edit past schedules
 - Add past

13. Invoices – access to Invoice tab with the following permissions:

- View
- Edit
- Edit Dates
- Edit Invoice Elements
- Edit Buyer Details
- Group Elements
- Ungroup Elements
- Edit (No time limit)
- Remove Element
- Add Element
- Adding invoice item from persisted transaction
- Add
- Delete
- Advanced deleting invoices
- Adding settlements

14. User vouchers – access to User vouchers tab and ability to edit and add a voucher to a given user account

- View
- Add

15. Club zones

- Club zone types – ability to view, add, edit and delete the club zone
 - View
 - Add
 - Edit
 - Delete

- Club zones availability calendar- ability to view the club zones
 - View
- View
- Add
- Edit
- Delete

16. Time tables – access to Time tables tab where we have the ability to operate in such positions as:

- Classes
 - View
 - Add
 - Edit
 - Delete
- Time tables
 - Delete
 - All
 - Only self
 - Delete (override time limit)
 - No limit for cancelling events booking per month
 - Can choose compensation logic
 - Edit
 - All
 - Only self
 - View
 - Add
 - Omit time limit on booking
 - Omit quantitative limit on booking
- Time tables categories
 - View
 - Add
 - Edit
 - Delete
- Activation

17. Regions– if there is a large number of clubs in a given network it is possible to divide clubs and assign them to the region. Each region can have assigned an employee responsible for the region and the budget

- View
- Edit
- Add
- Delete

18. Budgets

- View

19. Contract Discounts – access to the where we can create the promotion assigned to the selected payment plan

- View
- Edit
- Add
- Delete
- Show hidden discounts on the lists
- Adding a new promotion contract

20. Debt collection– access to Debt collection tab

- Batch contract cancel
 - View
- Debt collection
 - View
 - Edit
- Mass contract cancel in debt
 - View

- 21. Anonymous entrance custom reasons**– allow to the create anonymous entrance button to be used for Open days or on other marketing activity occasions
- View
 - Edit
 - Add
 - Delete
- 22. Automatic notifications**– access to creating notifications, allowing communication at the Club -> Client level
- Pending notifications
 - View
 - Send
 - Delete
 - System actions
 - View
 - Add
 - Delete
 - Edit
 - View
 - Add
 - Edit
 - Delete
- 23. Product discounts**– access to the tab responsible for creating the promotion assigned to a given product.
- Authorizations
 - View
 - Edit
 - Add
 - Delete
 - View
 - Edit
 - Add
 - Delete
 - Product promotions - adding all products – assigning promotion to all products
 - Remove all products – removing promotions from a given product group
 - Add as new – allows creating a new promotion based on a previously created one and saving it under a new name without introducing changes to the basic promotion
- 24. Color schema**
- View
- 25. File stores**
- View of file stores
 - Edit
- 26. Cash-in / Cash-out** – allows to activate Accepted amount and the Paid amount options on POSWeb. This are then visible on the bank report and in the "KW / KW" tab
- View
- 27. Refunds** – access to the tab responsible for entering information on refunds on a given user's contract:
- Refunds Form
 - processing Refunds Forms
- 28. Virtual accounts**
- Virtual accounts
 - Add
 - Accept
 - Deleting virtual accounts
- 29. Product categories** –allows creating a product category to which the product is assigned, eg: Category-Supplements -> assigned products - protein or protein bars.
- View
 - Edit

- Add
- Delete

30. Correction Reasons— allows registering the reason for the correction that we enter into the system, eg. adjustments to introduced changes in contractual transactions

- View the reasons for corrections
- Edit the reasons for corrections
- Adding the reasons for corrections
- Deleting reasons for corrections

31. Allowed IP addresses – the ability to provide access to the system from outside the organisation for a selected employee

- View
- Add
- Delete

32. Freeze types— ability to create freezes

- View
- Edit
- Add
- Delete

33. Contract cancel reasons— ability to create contract cancel reasons

- View
- Edit
- Add
- Delete

34. UserNotes

- UserNotesView
- UserNotesAdd
- UserNotesEdit
- UserNotesArchive
- ManageBlocking
- ManageSticky

35. Dictionary

- View
- Edit Dictionary

36. Voucher types – ability to create vouchers

- View
- Edit
- Add
- Delete

37. Voucher codes

- View
- Edit
- Add
- Delete

38. Banking report

- View
- Edit
- Add
- Modify confirmed
- Delete
- Edit system calculated values

39. Manual transfers

- View
- Edit & calc
- Accept
- Cancel

- Transfers rollback acceptance
- 40. Mass acceptance users** - mass acceptance of users (max 100)
 - View
 - Accept
- 41. Loyalty program**
 - Loyalty points history tab
 - Loyalty points redeem
 - Loyalty points add
- 42. Automation Center**
 - Notifications
 - View
 - E-mail notification templates
 - View
 - View
- 43. Commissions** – the ability to automatically calculate commissions for employees
 - Commission management
- 44. Activities management**
 - Activity categories
 - View
- 45. Classes groups** – access to Classes groups tab and the ability to assign a group members
 - Group members
 - Add member to group despite conflicts
 - View
- 46. Personal trainings**– access to the tab responsible for personal trainings
 - View
 - Ignore book in the past blockade
 - Ignore trainer unavailability blockade
- 47. Payment plans categories** – systematization of a payment given for the created category - permission mandatory for Scorecard
 - View
- 48. Personal training calendar**
 - View
- 49. Classes age limits**
 - View
- 50. Classes semesters**
 - View
- 51. Transaction documents**
- 52. Custom translations**
 - View
 - Manage
- 53. Mass anonymize users**– no visibility of sensitive data
 - View
 - Anonymize
- 54. Mobile**
 - Club games
 - View
- 55. Facility booking**
 - Calendar
 - View
 - Definitions
 - View
- 56. Personal training availability schedule**
 - View
 - View for all clubs
 - Add
 - Edit

- Delete

57. the view of dashboard

58. Endpoints

C. **Reports** – permission allowing access to many selected reports for a given employee (at the moment in the system there is 143 reports)

- Members

- New contracts
- All members
- Access Control
- Attendance Report
- Membership Totals
- Membership statistics by country
- Users without photo
- Users contact overview
- E-Payments Log
- Age of members
- Freeze
- Membership history
- User Access History
- E-Payments Log Summary
- Users without gantner card
- Membership Totals Summary
- Not started contracts
- Expired Credit Cards
- Registered from Internet
- Contract vouchers
- Coupon
- Coupon Usage
- Membership Statistics
- Ended Contracts Report
- Anonymous access
- Employee access
- Interactions
- Reactivated contracts
- Deleted users
- Direct debit authorisation
- NPS
- Sent text messages
- Accepted/Rejected report
- Contract Visits In Period
- Contracts with a limit of visits - details
- Visits in club
- Conversion and retention
- Booking Calendar Events Report
- Users cards
- Users cards all clubs
- Membership Portal Registrations
- Ended contracts additional
- User products
- Coupon conversion
- E-Payments Log Weekly
- Special buttons
- Access Control - Button usage
- Coupon
- User Marketing Details
- Reactivation and extensions of contracts

- Referrals
- Surveys
- Archival ser vouchers
- User agreements - details
- All contracts
- Active add-ons
- Renting lockers
- Membership statistics - all countries
- E-Payments Log - income reports
- Cessions
- Users vouchers
- Users recommendations
- Users documents
- New contracts - all countries
- User Changes
- New club members
- Usage of club services by members
- Usage of towel service by members
- ReportsMembersTestPermissionToFindError
- Clubs
 - Pos Transaction Log
 - Pos Transaction Day Summary
 - Pos Membership Transaction Log
 - Pos Transactions by Items Summary + bonus
 - New Memberships Payments
 - Pos Sales Totals and Bonus Sales
 - Employee Roles
 - Pos Transaction Sale Margin
 - PosTx by item by employee
 - Cashless payments
 - POS Transactions with discount
 - Studio
 - Towel Service Usage
 - Products in contract additional
 - Employee visits
 - Newsletter Feedback
 - Employee role change log
 - Employees
 - Cancelled classes
- Finances
 - Commissions for employee
 - View
 - All employees
 - Corrections
 - Date mismatch
 - Debtors
 - Profit and loss
 - Average Monthly Dues
 - Payments total
 - Online Payments
 - Income Report
 - Income Report All Countries
 - Invoice Summary
 - Invoice report
 - Cash-in / Cash-out
 - POS documents

- Cash-in / Cash-out
- Paid installments
- Refunds
- Virtual Account Payments
- Payment plans
- Accounting documents - details
 - Deposits
 - Freeze payments
 - Gate payment orders
 - Banking Report Summary
- Warehouse
 - Warehouse state
 - Warehouse documents summary
 - Warehouse movement
- All anonymized data is visible
- Only preview of anonymized data is visible
- View of reports stored
- D. **Perfect member**
 - Reports
 - Retention History
 - Membership Break Down
 - Weekly Staff Effectiveness Reports
 - Retention summary by employee position
 - Retention change
 - View
 - Edit
- E. **Administrator**
 - Direct debit – allows to generate direct debit
 - Generate booking
 - View
 - Generate payments
 - Generate authorization
 - Generate empty authorization
 - Bookings
 - View
 - Accept
 - Delete
 - Show payment bookings– allows to preview payment bookings set for given days
 - File download
 - View
 - Show payment files
 - File upload
 - Providers
 - File Transfer Direct Debit Authorization
 - The automatic generation – to set the automatic payment collecting from customer accounts, eg. a month ahead
 - View
 - Edit
 - Add
 - AdministratorEmployeeRole – permission responsible for the ability to assign individual roles in the PGM system and visibility of selected reports
 - AdministratorEmployeeRoleSeelInvisible
 - Background tasks
 - Tasks management
 - View
 - Edit

- Tasks dashboard
- Integration with external systems
 - View
 - Edit
- Epayments
- System permissions
- Power tools
- Administrator SMS
- Omit IP restriction
- Mass changes – access to the tab that allows to make mass changes to user accounts
- New roles loading
- System information
- KIR files upload
- Access to PerfectGym features suggestions portal
- Generating links to payment gate
- View all tickets from your company
- Taxes management

F. Newsletter

- View
- Newsletter Edit
- Delete Images

G. Club Manager

- Anonymous entrance
 - Guest access
 - Supply or meeting
- Assign card to employee
- Employee can use lockers
- Opening all studio classes
- View of the search
- View of the user details
- View of the user status
- Use of the base buttons
- View of the interactions
- View of the towels
- View of the user entrances
- View of the user transactions
- View of the lockers
- Allow use of anonymous entrance
- New endpoint installation
- Devices configuration
- Default employee selection
- POS view
- Classes view
- Club member's products view
- Club member's agreements view
- Notifications view
- Manually assign receipt number to unprocessed transaction
- Change payment type
- Online payment without default card change
- View of the Turbopanel
- Generate ended contracts documents

H. Marketing

- Sms

I. Dashboard

- Available elements
 - Weather

- Perfect member
- Perfect Gym Go
- Members by status
- New members
- Total revenue
- Visits in club
- Today's visits
- Month results
- Retention chart
- Task list
- Month KPI's
- Members by contract time
- New contracts
- Debtors by months on debt
- Debtors by status
- Revenue MTD
- Revenue history
- Payment plans types
- Live members history
- Future contract endings
- DashboardWidgetsEPaymentsEfficiencyCc
- DashboardWidgetsEPaymentsEfficiencyDd
- Contract cancellations
- DashboardWidgetsPaymentPlans
- Consultant sales
- Reception sales
- Personal trainings
- Sales by product category

J. Client

- Sent Message History

K. Crm

- Lead
 - AddLead
 - ViewLead
 - EditLead
 - Delete
- Event&Tasks
 - AddInteraction
 - ViewInteraction
 - EditInteraction
 - DeleteInteraction
- Interaction
 - InteractionSendEmail
 - InteractionSendSms
 - InteractionSendPush
- Opportunity
 - ViewOpportunity
 - AddOpportunity
 - DeleteOpportunity
 - Edit Opportunity
- Configuration
 - EditCrmConfiguration
 - ViewCrmConfiguration

L. System settings