

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 deleted
- **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 then 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

- Achievements – the ability to view the achievements of a given client
 - View
- 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. **Users groups** – adding user groups on customer's basic edit

- View
- Edit
- Add

5. **Custom attributes** – permission to add additional data on customer's basic edit

- Edit
- View

6. **View** - permission to view client data

7. **All clubs** – access from the system level to more than one club

8. **Add** – adding users in PGM

9. **Delete** – allows to remove previously added user in the PGM system

10. **View not active** – visibility of inactive users and viewing their contracts

11. **Accept new member**

12. **Accept in debt** – allows to accept a membership if it has not been paid

13. **Accept all without confirmation** - allows to accept all users

14. **Hard delete**

15. **Add guest** – adding guest in the PGM system (single entry, etc.)

16. **Bring temporarily rejected automatically to pending** – changing the status of the rejected contract to not accepted

17. **View sensitive data**– view of the payment card number or bank account number data

18. **View sensitive data of members owned by employee**

19. **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

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 interwal 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. Coupons - access to Coupons tab and ability to create and edit a coupon needed to acquire a client

- View
- Edit
- Add
- Delete

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

- View
- Add

17.

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

18. 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

19. 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

20. Budgets

- View

21. 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

22. Debt collection – access to Debt collection tab

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

23. 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

24. 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

25. 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

26. Color schema

- View

27. File stores

- View of file stores
- Edit

28. 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

29. Refunds – access to the tab responsible for entering information on refunds on a given user's contract:

- Refunds Form
- processing Refunds Forms

30. Virtual accounts

- Virtual accounts
- Add
- Accept
- Deleting virtual accounts

31. 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

32. 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

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

- View
- Add
- Delete

34. Freeze types – ability to create freezes

- View
- Edit
- Add
- Delete

35. Contract cancel reasons – ability to create contract cancel reasons

- View
- Edit
- Add
- Delete

36. UserNotes

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

37. Dictionary

- View
- Edit Dictionary

38. Voucher types – ability to create vouchers

- View
- Edit
- Add
- Delete

39. Voucher codes

- View
- Edit
- Add
- Delete

40. Banking report

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

41. Manual transfers

- View
- Edit & calc
- Accept
- Cancel

- Transfers rollback acceptance

42. Mass acceptance users - mass acceptance of users (max 100)

- View
- Accept

43. Loyalty program

- Loyalty points history tab
- Loyalty points redeem
- Loyalty points add

44. Automation Center

- Notifications
- View
- E-mail notification templates
- View
- View

45. Commissions – the ability to automatically calculate commissions for employees

- Commission management

46. Activities management

- Activity categories
- View

47. Classes groups – access to Classes groups tab and the ability to assign a group members

- Group members
- Add member to group despite conflicts
- View

48. Personal trainings – access to the tab responsible for personal trainings

- View
- Ignore book in the past blockade
- Ignore trainer unavailability blockade

49. Payment plans categories – systematization of a payment given for the created category - permission mandatory for Scorecard

- View

50. Personal training calendar

- View

51. Classes age limits

- View

52. Classes semesters

- View

53. Transaction documents**54. Custom translations**

- View
- Manage

55. Mass anonymize users – no visibility of sensitive data

- View
- Anonymize

56. Mobile

- Club games
- View

57. Facility booking

- Calendar
- View
- Definitions
- View

58. Personal training availability schedule

- View
- View for all clubs
- Add
- Edit

- Delete

59. the view of dashboard

60. 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 additionals
 - 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
 - AdministratorEmployeeRoleSeeInvisible
- 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. MiniCrm

- Consultant
 - Tab Home (Calendar View)
 - Contact database
 - Unassigned Leads View
 - Assign Leads
 - Consultant
 - Assign contract to lead
 - GDPRFilteringDisabled
- Manager
 - Tab Home (Widgets)
 - EditSellersTasks
- Crm
 - MiniCrmView
 - MiniCrmView

L. System settings