



# YourDigitalLift

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## YDL GYM CRM

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New Feature

Most Used Feature

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### Features:

#### 1. Dashboard

- a. View Today's Expected Payments, Follow ups, Appointments
- b. View Today's Batches Taken(Zumba, Dance etc,)
- c. Today's, Current Month, Current Year Collection report
- d. Total Active/Expired Subscriptions
- e. Total Enquiries
- f. Live Members
- g. Present Check Ins
- h. Live App installs
- i. Active PT / Expired PT Subscriptions
- j. Live Trainers - Once which are on the Gym floor right now
- k. Today's Bday, Today's Gym membership Anniversary
- l. Quick Follow ups - Search for client name and add the follow up then and there
- m. External Tab - Keep a tab on the reception , when a walkin enters the gym they can directly fill their details from the tab and the enquiry will be recorded in the system , can also be used for check ins for members
- n. Current Checkins list with membership has expired, Balance Amount, Memberships which are going to expire in next 15 days

#### 2. Enquiry/Lead Management

- a. Add leads manually

- b. Automated Leads on real-time basis from
  - i. Mobile Application
  - ii. Website
  - iii. Facebook/Instagram

### **3. Follow ups :**

- a. Add Follow ups for the leads & members
- b. Automated Follow ups
  - i. Assign Free trial
  - ii. Membership Expiry : 3 days, 7 days & at the time of expiry
  - iii. Balance Due Follow ups
  - iv. Irregular member follow ups
  - v. Courtesy follow up

### **4. My Members**

- a. View all members in one place

### **5. Client database**

- a. View Members & Enquiries in one place and transfer Members/Enquiry from once Staff to another

### **6. Analysis**

- a. Traffic Analysis
- b. Membership Analysis
- c. Subscription Analysis
- d. Renewal Analysis
- e. Follow up Analysis
- f. Conversion Analysis
- g. Enquiry Analysis
- h. Enquiry to Member Analysis

### **7. Create Membership Plans**

### **8. Coupons**

### **9. Batches**

### **10. Combo Offer**

### **11. Customer Profile**

- a. Add Subscription
- b. Freeze/Transfer/Upgrade Subscription
- c. Assign Personal training
- d. Book A Free Trial
- e. See Follow up history
- f. Add member & fingerprint to Biometric
- g. Attendance
- h. Client Form
- i. Client Referrals

- j. Send Notification

## **12. Accounts**

- a. Receipt register
  - i. View all receipts in one place and collections datewise
- b. Subscription Register
  - i. View Active , Expired, Used, Total subscriptions Datewise
- c. Collection Report
  - i. Download Daily Collection report
  - ii. Date wise Sales & Collection Report in PDF/Excel
- d. Advance Receipt Register
- e. PT register
- f. Recorded Sessions Register
- g. Expired Membership Register
- h. Balance Due Register
- i. GST Register
- j. Write Off Register

## **13. Payroll**

- a. Calculate Payroll
  - i. Select date and calculate payroll of staff

## **14. Expense**

- a. Add day to day expense
- b. Add vendor list

## **15. Broadcast SMS**

## **16. Broadcast Notifications**

## **17. Workout plans/Diet plans**

- a. Make Workout & diet plans public
- b. Approve recipes

## **18. Trainers**

- a. Add Trainers
- b. My Trainers

## **19. Fitness center**

- a. Add Fitness centers
- b. Fitness center Settings
  - i. SMS settings
  - ii. Biometric Settings
  - iii. Links
- c. Invoice Number Settings
- d. Fitness center Holidays
- e. Fitness center Rules & Notices
- f. Fitness center Currency Settings

- g. Feedback

## **20. Manage Staff**

- a. Add Staff
- b. Staff Access Control

## **21. Attendance Report**

- a. Trainer Attendance EXCEL download
- b. Staff Attendance EXCEL download

## **22. Campaign Creation**

- a. Gym can run a Member retention program in the application where customers will get points on attendance, recording of workout, meals etc.
- b. [https://docs.google.com/document/d/1hEFTPVA-NdMoe19c1eGqb63yL7LykY8\\_R7ud178fujA/edit?usp=sharing](https://docs.google.com/document/d/1hEFTPVA-NdMoe19c1eGqb63yL7LykY8_R7ud178fujA/edit?usp=sharing)

## **23. Ecommerce/Inventory Management**

- a. Gym can sell products from the App and create bill from the dashboard to manage the inventory

## **24. App Settings**

- a. On/Off App Permissions
  - i. Control the application from the Dashboard
- b. Add Gallery Images
- c. Manage Action Items
- d. Manage Banners
- e. Add Social media Links

## **Most Used Features:**

1. View Today's Expected Payments, Follow ups, Appointments
2. Present Check Ins
3. Current Checkins list with membership has expired, Balance Amount, Memberships which are going to expire in next 15 days
4. Enquiry/Lead Management
5. Manage Follow ups
6. Manage Membership Plans
7. Manage Coupons
8. Add Subscription
9. Freeze/Transfer/Upgrade Subscription
10. Assign Personal training
11. Book A Free Trial
12. See Follow up history
13. Add member & fingerprint to Biometric
14. Client Attendance

15. Client Form - Add Pan card , Adhar card etc.
16. Receipt register
17. Subscription Register
18. Download Daily Collection report
19. Date wise Sales & Collection Report in PDF/Excel
20. PT register
21. Expired Membership Register
22. Manage Trainers
23. Manage Staff
24. Manage Action Items in App
25. Mange Banners in App

## Upcoming Features

1. Access Control for Trainer Dashboard & trainer App
  - a. Admin can control from the Dashboard what is to be shown to the Trainers e.g. Can enable Calling from the trainer app directly or Hide Workout plans from the trainer app. Etc.
2. Advanced Trainer Attendance & Payroll System
  - a. The Trainer Can request for Leaves & Half days from the Trainer App
  - b. This request will be received by the Admin and he/she will accept the same
  - c. While Accepting the request two options will be displayed:
    - i. Paid Leave
    - ii. Unpaid Leave
  - d. According to the option selected by admin, in the **Payroll Calculator the Salary will be calculated**
3. Trainer Incentive Or Bonus System
  - a. There will be a rating system for each and every trainer , these ratings will be give by the Client to the trainers, according to the ratings the trainer will be given an incentive
4. Feedback listing trainer wise on completion of the workout.
5. E Commerce - Create backdated Product bills support
6. E Commerce - Notes/instruction of the order
7. Broadcast Whatsapp
8. Third party integration with EXOTEL, MAILCHIMP

## Known Bugs

1. Automatic Password reset for Admin/Staff
  - a. If Admin/Staff logs in to the Client Application with the same number or Adds an enquiry or member from the dashboard with the same number their password gets reset. This happens as in our customer app is Number login System and in order to login the Admin to the customer application it has to reset the password and authenticate him/her
2. Client Number change
  - a. If a Client gives a wrong number and now wants to change it to the right number , and that number is already present in the system as another user then it throws an exception that the user exists. The client has to request YDL to delete the Wrong number from the backend and gym staff has to add member from the CRM again with the correct number
3. Broadcast SMS/Whatsapp
  - a. The server is crashing when it reaches SMSes/Whatsapp messages more than 800, the Tech team is trying out a few caching and queuing techniques for the same and testing it vigorously for the same.
4. Ads Connect
  - a. Facebook has disabled the App on violations of the facebook rules, we have appealed to them to review our app again with explanation and usage of the app.