

# **Release Notes**

**InTouch Follow-Up v5.13.0**

**Multi-Club Features Only**

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## 1 Product Release Information

Product	InTouch Follow-Up
Release number	5.13.0
Contact	For more information, please contact <a href="mailto:support@intouchfollowup.com">support@intouchfollowup.com</a>

## 2 New Features

### 2.1 Single Login

This feature gives a user the ability to log in to one club and switch from that club to another linked club without having to log out and log back in with a different username and password. In other words, the user only needs one username and password to log in to all the clubs associated with their account.

To access this feature you need the following to be in place:

- Your club must be enabled as a Multi-Club Organization- please contact [support@intouchfollowup.com](mailto:support@intouchfollowup.com) to get this feature enabled
- Your username must exist at all clubs to which you wish to be associated
- Your username must be mapped to all associated clubs - see feature 2.4 below for how to do this

To log in with one username and password:

- Log in with your preferred username and password
- You will be logged into one of your clubs
- The name of the club is shown in the header banner
- Click the green “Switch” icon to view a list of clubs you are associated with
- Click the name of the club to which you wish to log in
- You are now logged in to the club whose name displayed in the blue header banner



## 2.2 Multi-Club Reports

This allows you to run a few of your LIVE REPORTS for a range of clubs associated with your user account.

Whereas the single club report lists individual staff data and a club total, the multi-club report shows each club's total as a row and the organization's total.

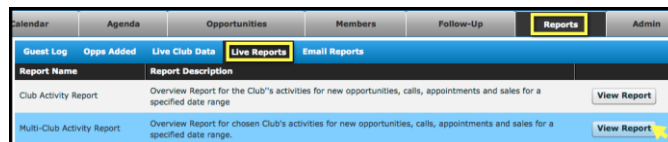
Multi-Club Activity Report								
Club InTouch								
Date: June 01, 2012 To June 30, 2012								
Name	Membership Opportunities Added				Calls Made			
	Leads Added	Referrals Added	Walk-In's Added	Total Opportunities Added	Total Calls	Calls to Not Visited Guest	Calls to Missed Guest	Calls to Members
InTouch Water St	7.0	7.0	1.0	15.0	63.0	68.3 %	22.2 %	9.5 %
InTouch Wilmington	32.0	0.0	0.0	32.0	37.0	67.6 %	16.2 %	16.2 %
InTouch Vancouver	0.0	0.0	1.0	1.0	2.0	0.0 %	50.0 %	50.0 %
<b>Total</b>	<b>39.0</b>	<b>7.0</b>	<b>2.0</b>	<b>48.0</b>	<b>102.0</b>	<b>66.7 %</b>	<b>20.6 %</b>	<b>12.7 %</b>

This feature is currently available for the following reports:

- Club Activity Report - Multiple Clubs
- Memberships Sales Activity Report- Multiple Clubs
- Personal Training Sales Activity Report- Multiple Clubs

### How to access these reports

1. Go to the Reports tab
2. Go to Live Reports tab
3. Find the Report you wish to view and click View Report
4. In the following pop up window or new tab:



### Reporting

**Multi-Club Activity Report** - Overview Report for chosen Club's activities for new opportunities, calls, appointments and sales for a specified date range.

**Please select report parameters:**

Clubs Select which clubs to run your report for (ctrl-click to select multiple)

InTouch Water St  
 InTouch Wilmington  
 InTouch Vancouver

Date From Starting date 2012-07-01 ...

Date To Ending date 2012-07-01 ...

Report Format PDF (Portable Document Format) ▾

Legend [click here to download](#)

- By default all clubs are selected but you can select the clubs you wish to view by **CTRL-CLICK** on the club name(s). (Note: You will only see clubs associated to your login. )
- Input the date range for your report
- Select your report format (PDF, RTF or CSV)
- Click View Report

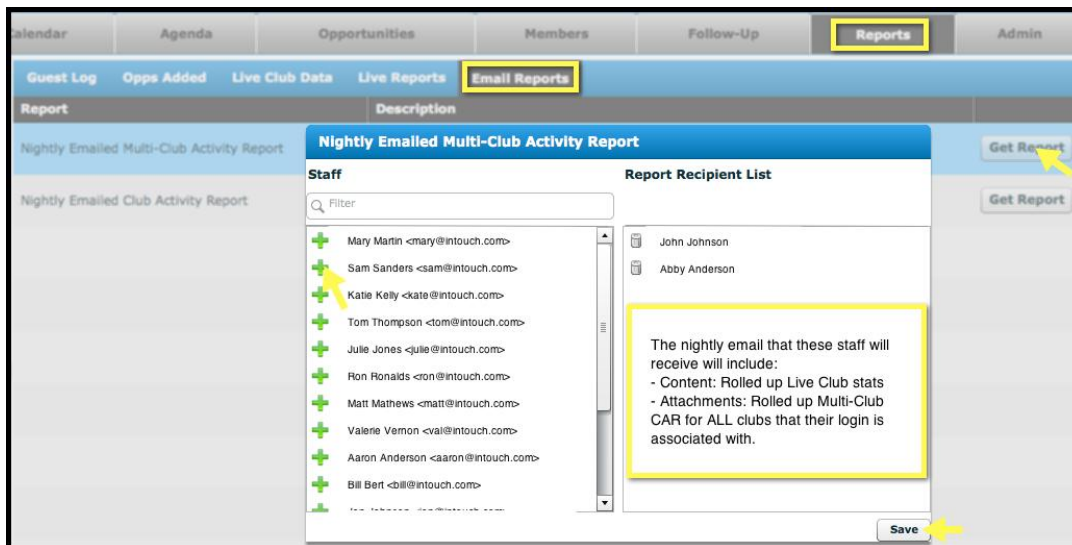
## 2.3 Subscribe to Nightly Email with Multi-Club CAR Data

This feature gives the user the ability to subscribe to a nightly email that gets sent to the user's email with the "Multi-Club Activity Report" for yesterday and the month to date for all the clubs that the user is associated with. This will show the total performance for each club as a row in the attached reports but will not show staff user detail.

Note: It is still possible to subscribe to the current single Club Activity Report email also. This will deliver one email per club showing individual staff performance for a single club.

To subscribe to these report emails

1. Go to Reports Tab
2. Go to Email Reports
3. Scroll to the "Emailed Multi-Club Activity Report" row and click Get Report
4. Find your username and email address and click the green cross to add that user to the report subscription. To remove a user, click the "Trash can" icon on the right panel



### Limitation:

The email will be sent to the first email address recorded for that user. If a staff person has different email addresses in different clubs, the report will only send to one email. Please update your user account details at all associated clubs with your preferred email address.

## 2.4 Set Permissions to Assign Staff to Multi-Club access

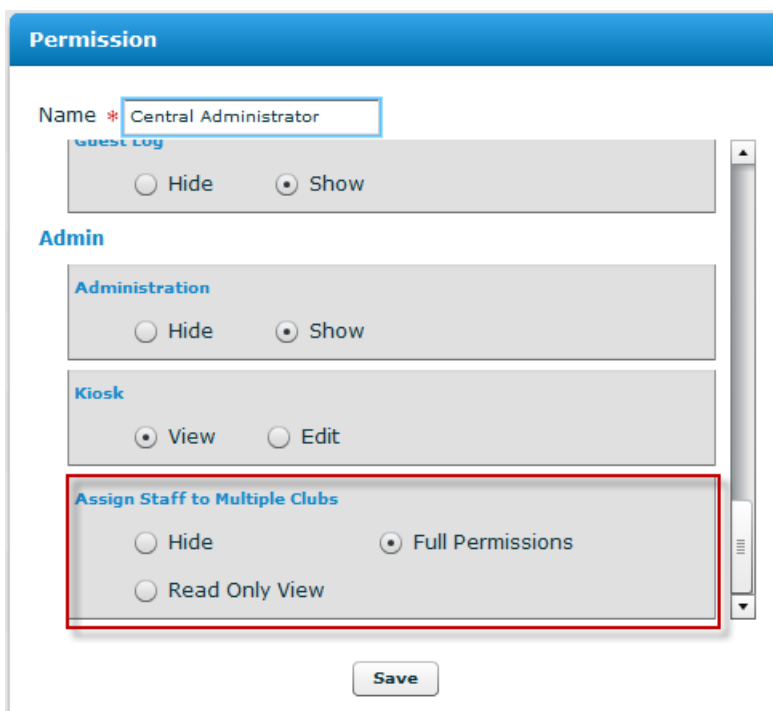
### Pre-requisites

Your club must be enabled for Multi-Club features see 2.1 above.

You must be logged in as a user who has access to set permissions at a club (generally the InTouch Administrator for your club)

### Steps

1. Login as a user with admin permissions
2. Go to Admin tab
3. Go to permissions tab
4. Click Edit on the permission role you want to change
5. Scroll to the bottom to find "Assign Staff to Multiple Clubs"
6. Click the radio button for the permissions you want to set as follows:-
  - a. Full permissions- allows a user to view and assign users to multiple clubs.
  - b. Read Only View- allows a user to view which clubs staff are assigned to but not to assign them to other clubs
  - c. Hide - will not allow a user to view or assign other users to multiple clubs



The screenshot shows the 'Permission' configuration window for the 'Central Administrator' role. The 'Name' field is set to 'Central Administrator'. The 'Guest Log' section has 'Show' selected. The 'Admin' section has 'Administration' set to 'Show' and 'Kiosk' set to 'View'. The 'Assign Staff to Multiple Clubs' section is highlighted with a red box, and 'Full Permissions' is selected. A 'Save' button is located at the bottom of the window.

## 2.5 Assign Staff to Multi-Club features

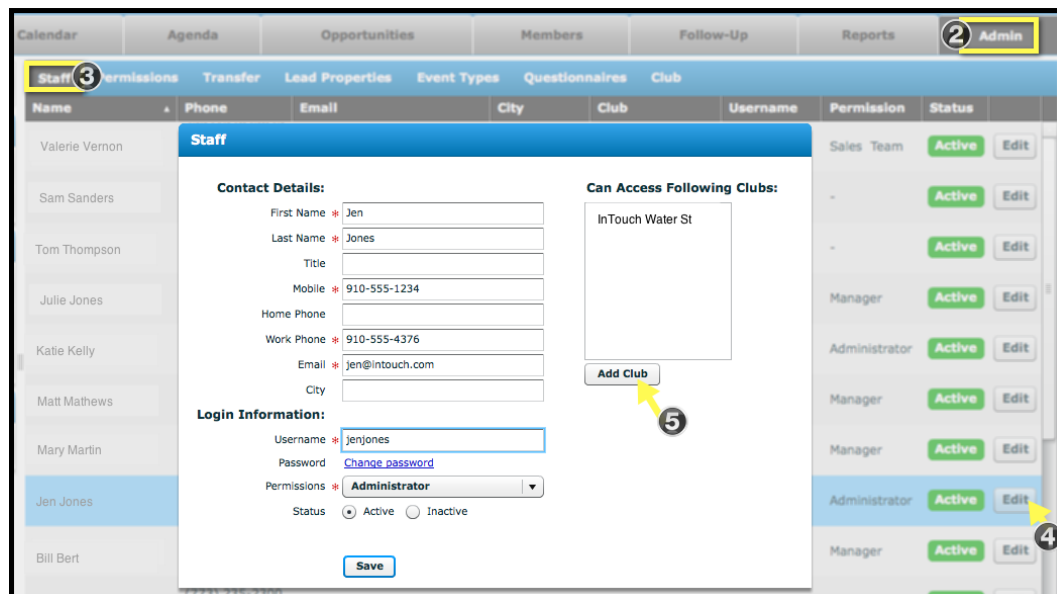
### Pre-requisites

First the user you wish to assign must exist as a member of staff at each club to which they need access to.

Second the logged in user must have Multi-club permissions set to access this feature see 2.4 above.

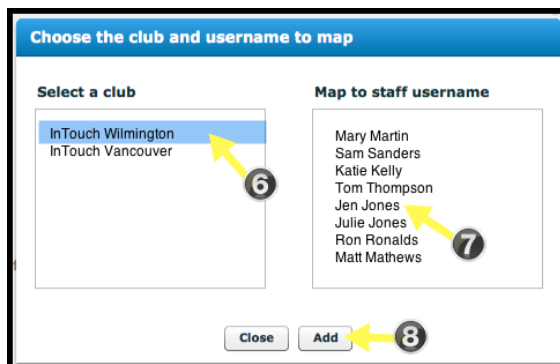
### Steps

1. Log in to any club as an administrator
2. Go to Admin tab
3. Go to Staff
4. Click Edit button next to the staff you wish to associate to other clubs
5. Click Add Club



In the following pop-up window:

6. Select the club to which you wish to add this user
7. A list of staff usernames that already exist at that club appears. Click the username that should be mapped to the staff user you are editing.
8. Click Add
9. Repeat steps 5-8 until all desired clubs are added
10. Click save on the staff window



This user can now login to multiple clubs with one login and is able to view multi-club reports for the clubs that they have been mapped to.

### **3 Known Limitations in this release**

#### **3.1 *Staff Permissions per club***

The staff user account may have been set-up with different permission roles at each club OR the permissions at each club may not be consistent across all clubs. When a user switches clubs the permissions that are set at the target club will always be used e.g. CTupper could be an Admin user at one club but a Sales Team user at another club. We recommend that you take this opportunity to review permissions and staff permission settings across all users when you set-up Multi-Club users.

#### **3.2 *Editing Staff details per club***

Changing staff details at a single club will not cascade to staff details at associated clubs. As such any changes to staff details must be completed at each individual club.

#### **3.3 *Multi-club Reports for single club users***

A single club user who exists at a club where Multi-Club features are enabled, will see the Multi-Club reports listed in the Live Reports list. Nevertheless, this user is only able to run this report for their own club only. I.e. They can only see data for clubs that their username is associated with.

#### **3.4 *Multi-club Reports performance speed***

If a user has many clubs associated to their username, the Multi-Club report performance may be a little slower than a single club report performance.

#### **3.5 *Get Multi-Club Email Reports***

A user who can subscribe to the Multi-Club email report at a single club, does NOT need to subscribe at every club, they will get a single email whether they subscribe at one club or multiple clubs. However as a consequence when they are logged in to other clubs, the "Get Report" dialog will not show that their "home" username has been subscribed. We recommend that you subscribe using the club you first log in to.