

Release Notes

InTouch Follow-Up v5.14.0

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1 Product Release Information

Product	InTouch Follow-Up
Release number	5.14.0
Release date/details	October 10, 2012 9:20pm PT Possible downtime of up to 30 min
Contact	For more information, please contact support@intouchfollowup.com

2 Enhancements

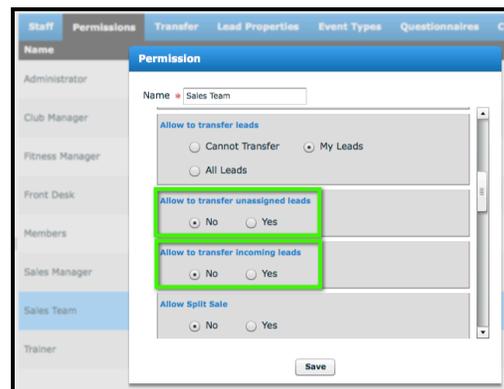
2.1 *Permission for owning and transferring leads improved*

Many users are not permitted to transfer leads from another lead owner to themselves or vice versa. This also means that they have to wait for a manager to transfer an incoming text or web or Facebook lead to them to start contacting the lead straight way (and we know you like to contact a lead while they are hot!).

Now you can set up permissions to be able to transfer Incoming Leads or Unassigned Leads but NOT to be able to transfer other lead owners leads. So that means you can give your sales staff permissions to assign incoming web leads to themselves, but NOT be able to transfer (steal) other staff's leads. (Yes, we've heard about you people who are stealing leads from your colleagues while they are off!!)

Your current staff permissions have not been changed, but if you want to allow Sales Staff to start assigning incoming web leads or incoming Facebook leads to themselves then: -

1. Go to the Admin Tab
2. Go to the Permissions Tab
3. Select Sales Staff (or the appropriate permission/role) and click Edit
4. Scroll down to the Leads Section
5. Scroll down to "Allow to transfer incoming leads"
6. Click "Yes"
7. Click Save



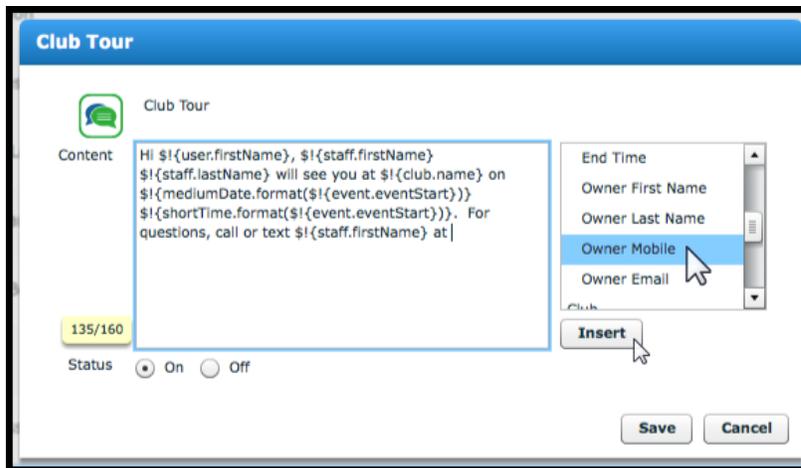
Next time they login they will be able to assign incoming leads. To allow staff start assigning Unassigned Leads to themselves, use the same process, but change "Allow to transfer unassigned leads" to Yes.

2.2 **Lead Owner Mobile & Email added to SMS merge fields**

A number of customers had asked for the ability to add the Lead Owner's mobile number or email to their outgoing text messages. Both of these fields are now available as Merge Fields in your Text Alerts.

To change your outgoing SMS text message for appointments:

1. Go to the Follow-Up Tab
2. Go to the Text Alerts Tab
3. Select the Event (i.e.: Appt Type) message you wish to change and click Edit
4. Make sure your cursor is where you want to insert the field
5. Highlight the appropriate Merge Field
6. Click Insert and Save



Remember: You will need to make sure the staff person's mobile number and/or email are listed under their contact details under Admin > Staff.

2.3 **Closing Percentage in CAR & Live Club Data includes All Sales**

A number of customers had sales that were not shown in their CAR closing percentage because the new member had not been recorded in InTouch as having attended the club so they appeared as "Other Sales".

Now InTouch assumes that the lead has visited the club whenever you Make a Sale so any lead that has not been recorded as a guest will appear in the Drop-In Guests column and as such also appears in the closing percentage calculation.

3 Resolved Issues

3.1 *Gold's Gym Web Leads not shown on dashboard*

Fixes an issue where leads generated by the Gold's Gym Corporate website were not showing on the dashboard for incoming leads.



Incoming Leads To Be Assigned			
	Website	Facebook	Text
	19	0	0

3.2 *Duplicate leads sent to Connector when TI script saved too quickly*

Fixes an issue where some users were adding a new Telephone Inquiry lead and saving the Telephone Inquiry script without completing it causing a double save of a new lead to their Club Management System. These leads should no longer appear twice in your club management software.

3.3 *Fixed broken merge fields for a number of customers*

We noticed some of our customers had emails with broken merge fields that would result in incorrect data merges. For example, if you accidentally erased the “!” from a merge field and email had “Dear \${user.firstname}” instead of “Dear \$!{user.firstname}”, your email would be sent as “Dear \${user.firstname}” and not “Dear Kelly”. We have corrected all the existing broken merge fields and will be working towards a way to protect all merge fields from being changed/broken in the future.

3.4 *SMS merge field appears in 24hr format for 24hr time format locales*

For our customers that use a 24-hour clock format in their InTouch site(s), the appointment times in your outgoing SMS Text Messages will now reflect the 24-hour format and not the AM/PM format.