

# Release Notes

**InTouch Follow-Up v5.15.0**

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## 1 Product Release Information

Product	InTouch Follow-Up
Release number	5.15.0
Release date/details	November 14, 2012 9:20pm PT Possible downtime of up to 30 min
Contact	For more information, please contact <a href="mailto:support@intouchfollowup.com">support@intouchfollowup.com</a>

## 2 New Features

### 2.1 *Expire a Member*

Wondering what to do with a member in InTouch when they cancel their membership? You can now expire a member when their membership ends and renew them if they come back. And yes, reporting and follow-up options for expired members will be coming in a future release!

Name	Member Owner	Joined	Expired
<a href="#">Johnny Jubert</a>	Caitlin Manager	May 1, 2012	Today
<a href="#">Ryan Mahanna</a>	Caitlin Manager	May 18, 2012	Today

To expire a member:

1. Find the member (with the blue icon) and click on their name
2. Click Expire Member and confirm your action
3. The expired member will then have a red icon and can be found under Members > Former Members.

**Expire Member Alert**  
Are you sure? This will expire this membership record and stop all member communication.

Name	Member Owner	Joined	Expired
<a href="#">Johnny Jubert</a>	Caitlin Manager	May 1, 2012	Today
<a href="#">Ryan Mahanna</a>	Caitlin Manager	May 18, 2012	Today

To renew an expired member:

1. Find the member under Former Members and click on their name
2. Click Renew Member and confirm your action
3. This will put the member back into their original follow-up schedule by keeping their original join date.

## 2.2 *Schedule a birthday email to leads or members*

Send your leads and/or your members a special email on their birthday! We've added two Follow-Up emails: One to send to members on their birthday and one to send to interested leads on their birthday. Just set up the emails (maybe with a special offer??), turn them on, and let InTouch Follow-Up do the rest!

**To set up your email message:**

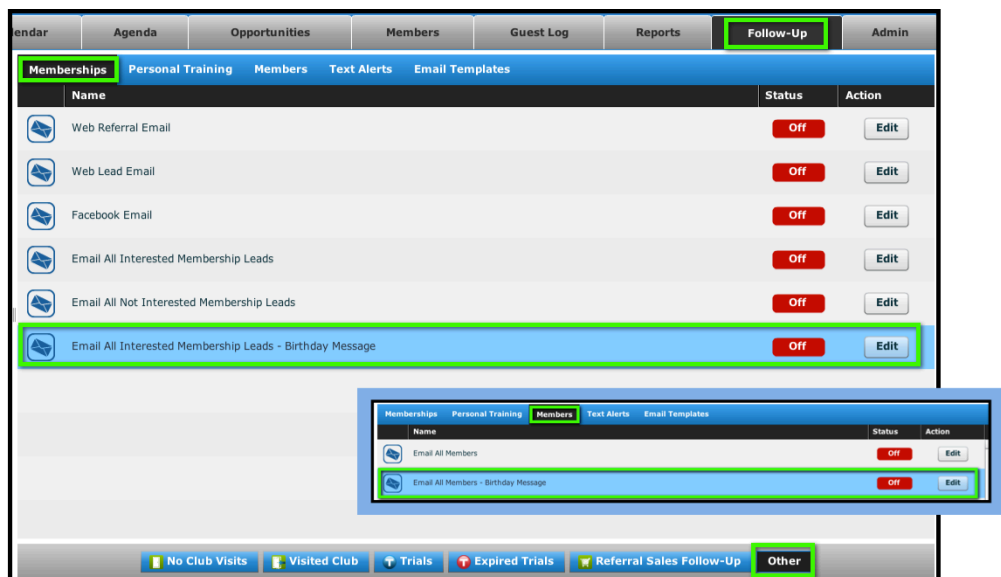
1. Find the email and click Edit

### For Leads

- Click on the Follow-Up Tab > Memberships > Other
- Find the Email All Interested Membership Leads – Birthday Message

### For Members

- Click on the Follow-Up Tab > Members
- Find the Email All Members – Birthday Message



The screenshot shows the InTouch software interface. At the top, there is a navigation bar with tabs:endar, Agenda, Opportunities, Members, Guest Log, Reports, Follow-Up (highlighted), and Admin. Below this is a sub-navigation bar with tabs: Memberships, Personal Training, Members, Text Alerts, and Email Templates. The main content area displays a table of email templates. The table has columns for Name, Status, and Action. The following table represents the data shown in the screenshot:

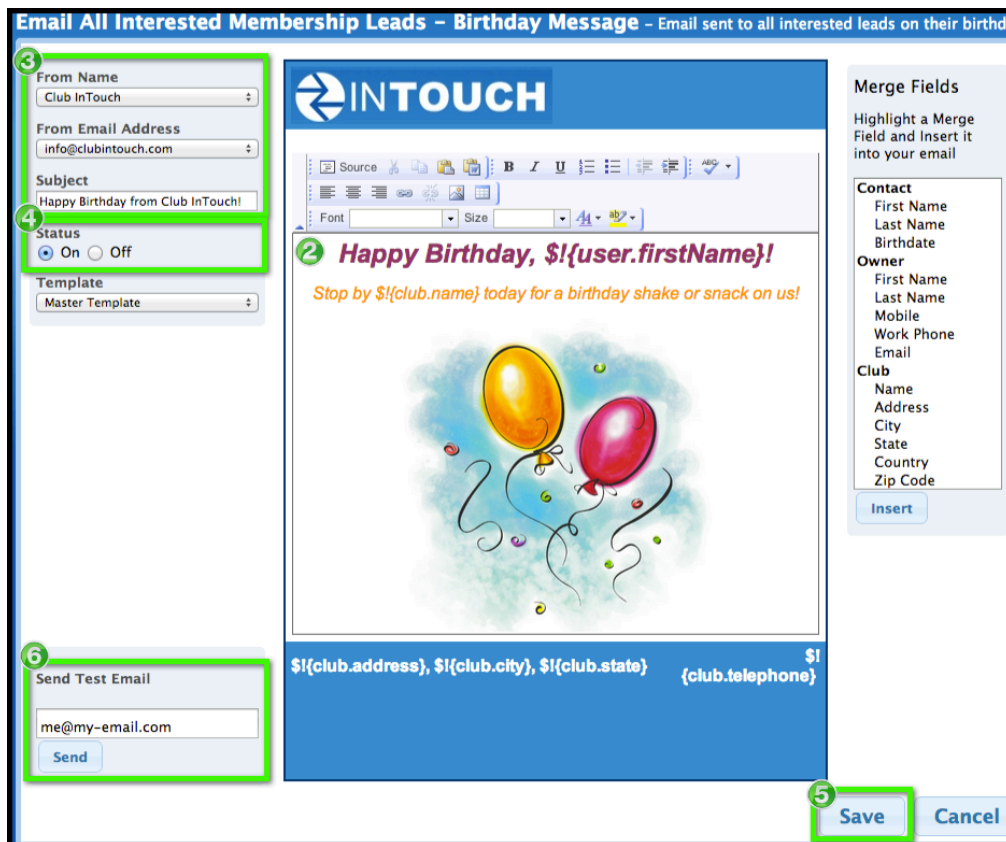
Name	Status	Action
Web Referral Email	Off	Edit
Web Lead Email	Off	Edit
Facebook Email	Off	Edit
Email All Interested Membership Leads	Off	Edit
Email All Not Interested Membership Leads	Off	Edit
Email All Interested Membership Leads - Birthday Message	Off	Edit

An inset window shows the 'Members' tab selected, displaying a similar table with two rows:

Name	Status	Action
Email All Members	Off	Edit
Email All Members - Birthday Message	Off	Edit

At the bottom of the interface, there is a status bar with buttons: No Club Visits, Visited Club, Trials, Expired Trials, Referral Sales Follow-Up, and Other (highlighted).

2. Create your message
3. Select who the email should come from (i.e.: Lead Owner or Club Name)
4. Change the Status to On
5. Click Save
6. As always, AFTER you SAVE your message, click Edit and send yourself a test email to make sure the formatting and merge fields look the way you expect them to look when a lead/member receives them.



**Email All Interested Membership Leads - Birthday Message** - Email sent to all interested leads on their birthday

**1** From Name: Club InTouch

**2** From Email Address: info@clubintouch.com

**3** Subject: Happy Birthday from Club InTouch!

**4** Status:  On  Off

Template: Master Template

**5** Send Test Email: me@my-email.com **Send**

**6** Preview Content:

**INTOUCH**

**2** Happy Birthday, **!{user.firstName}!**

Stop by **!{club.name}** today for a birthday shake or snack on us!

**!{club.address}, !{club.city}, !{club.state}** **!{club.telephone}**

**3** Merge Fields:

Highlight a Merge Field and Insert it into your email

**Contact**

- First Name
- Last Name
- Birthdate

**Owner**

- First Name
- Last Name
- Mobile
- Work Phone
- Email

**Club**

- Name
- Address
- City
- State
- Country
- Zip Code

**5** **Save** **Cancel**

### 3 Enhancements

#### 3.1 Follow-Up tab moved next to Admin Tab

The Follow-Up tab moved to the right of the Reports tab so now all your adjustable settings are in the two far right tabs: Follow-Up and Admin.



### 3.2 Multi-Club Active Leads Export Report

This enhancement is for clubs with multiple locations using the InTouch Follow-Up Pro version. This new report will allow you to export ALL active leads from EVERY club for which you have access instead of having to export from each location.

	A	B	C	D	E	F	G	H
1	Club	Lead Status	First Name	Last Name	Mobile	Home Phone	Work Phone	Email
2	Club InTouch - ILM	Interested	Kevin	Perkins	9105558493			
3	Club InTouch - ILM	Interested	Kevin	Garnett	9105559483			kg@celtics.com
4	Club InTouch - ILM	Interested	D'alexander	Davis	9104448594			
5	Club InTouch - ILM	Interested	Julie	Benson	8439993841			
6	Club InTouch - ILM	Interested	Nelson	Nunn		9104489542		
7	Club InTouch - Coastal	Interested	Tom	Norris				tn@gmail.com
8	Club InTouch - Coastal	Interested	Perry	Watts		9108545577		perry@gmail.com
9	Club InTouch - ILM	Not Interested	Peter	Topper				petey@gmail.com
10	Club InTouch - ILM	Not Interested	Kelly	Smithe				
11	Club InTouch - ILM	Not Interested	Caitlin	Tester				
12	Club InTouch - ILM	Won	Lucy	Diamonds				
13	Club InTouch - ILM	Won	Joey	Jordan				
14	Club InTouch - ILM	Won	Kelsey	Holden				

To access this report:

1. Go to Reports > Live Reports
2. Find the Multi-Club All Leads Status Report (CSV)
3. Click View Report
4. Enter in your date range. By default, all your clubs will be highlighted, but you can select any combination clubs by using Ctrl-Click.
5. Click View Report