Release Notes

InTouch Follow-Up v5.15.0

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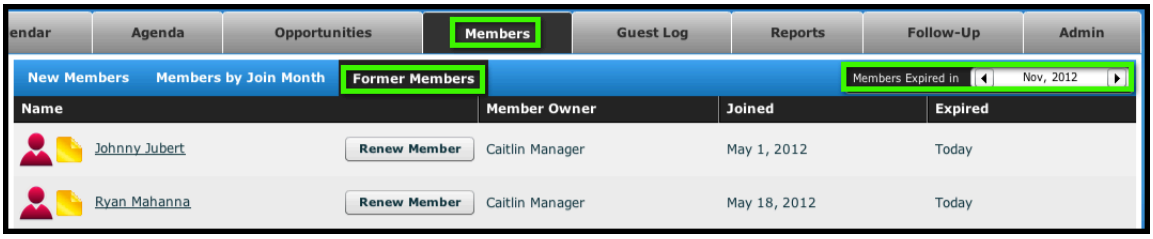
1 Product Release Information

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 support@intouchfollowup.com

2 New Features

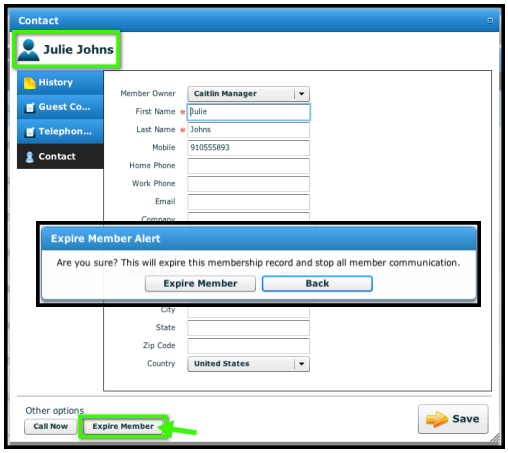
2.1 *Expire a Member*

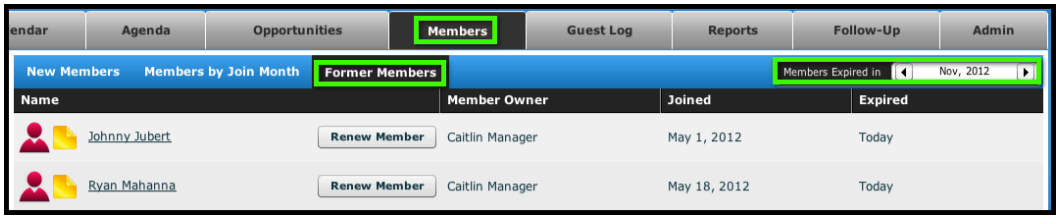
Wondering what to do with a member in InTouch when they cancel their membership? You can now expire a member when their membership ends and renew them if they come back. And yes, reporting and follow-up options for expired members will be coming in a future release!



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.





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:

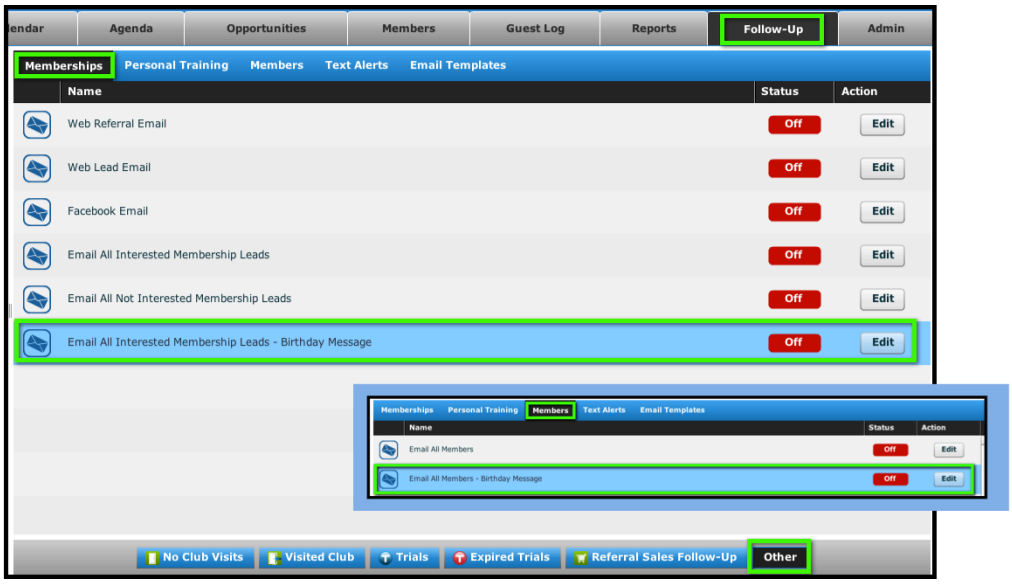
1. Find the email and click Edit

   For Leads

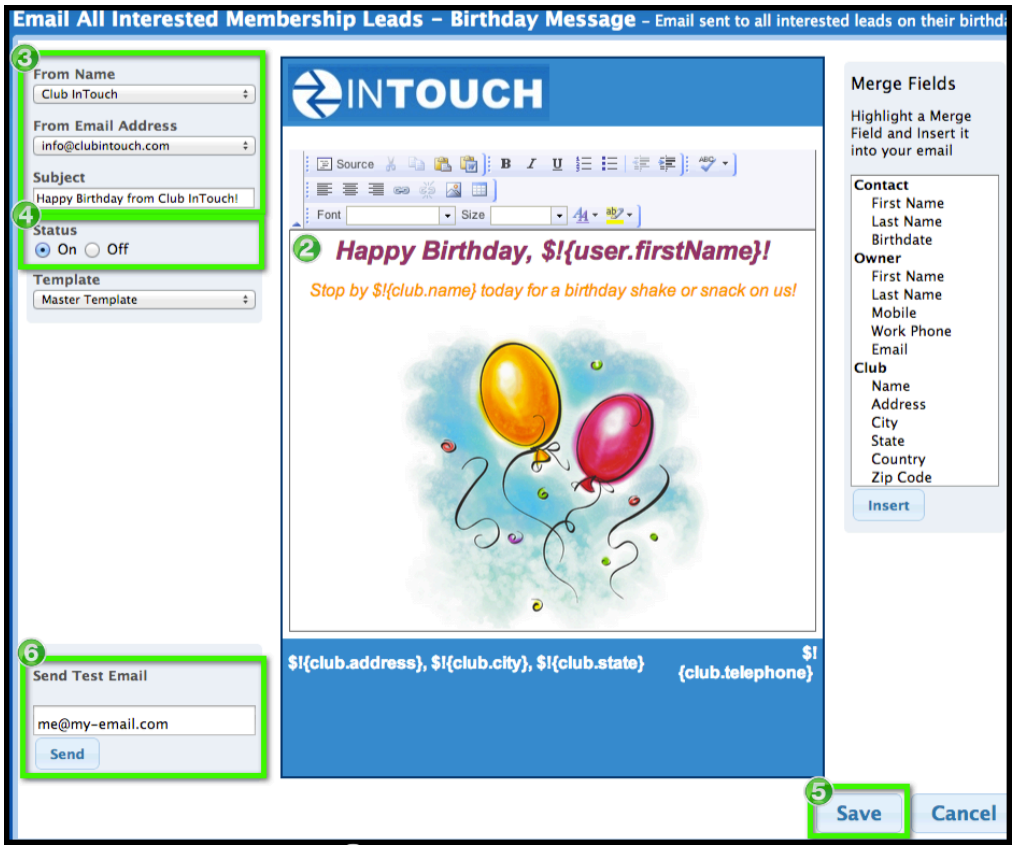
   - Click on the Follow-Up Tab > Memberships > Other
   - Find the Email All Interested Membership Leads – Birthday Message

   For Members

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



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.



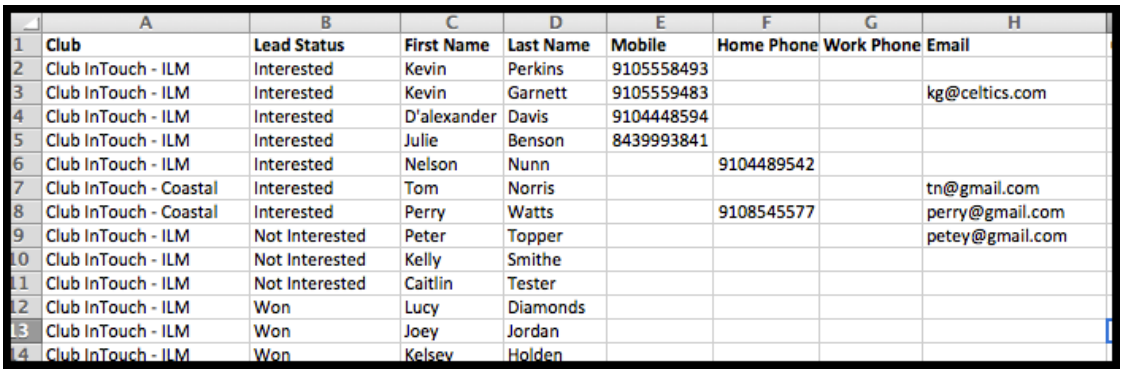
3 Enhancements

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