

# **Release Notes**

## **InTouch Follow-Up v5.4**

## Contents

1	Product Release Information.....	3
2	Overview.....	<b>Error! Bookmark not defined.</b>
3	New Features.....	3
4	Enhancements .....	4

# 1 Product Release Information

Product	InTouch Follow-Up
Release number	5.4
Release date	
Contact	For more information, please contact <a href="mailto:customerservice@intouchtechnology.com">customerservice@intouchtechnology.com</a>

## 2 New Features

### 2.1 Club Details

Update club information from the Admin tab

The screenshot shows the InTouch Admin interface. The top navigation bar includes Home, Calendar, Agenda, Leads, Members, Follow-Up, Reports, and Admin (highlighted with a green box). Below the navigation bar is a search bar and a secondary menu with options: Staff, Permissions, Transfer, Lead Sources, Questionnaires, and Club (highlighted with a green box). On the left side, there is a 'Quick Links' sidebar with buttons for New Lead, Walk-in Sale, Telephone Lead, and New Staff. The main content area displays the 'Club Details' form for a club named 'Club InTouch'. The form includes fields for Club ID (1082), Club UUID (151183e0-bda0-11de-8a39-0800200c9...), Club Name, Address (329 Railway St), City (Vancouver), State (BC), Zip Code (90210), Country (United States), Club Web Site (www.intouchfollowup.com), Phone (6047733743), Fax, Email (kmaine@intouchfollowup.com), Email From Name (InTouch Follow-Up), Locale (en\_US), and Timezone (America/Vancouver). Under the 'Contact Information' section, the Primary Contact is set to Kristen Maine, with fields for Title, Phone, Mobile (604) 773-3743, and Email (kmaine@intouchfollowup.com). At the bottom of the form are 'Save' and 'Cancel' buttons.

Club ID = internal reference number for you club

Club UUID =Unique Identifier, this is used in the WebSite and Facebook applications

Locale = language, set by InTouch

Timezone = set by InTouch

Primary Contact =information pulled from your Staff Roster

## **3 Enhancements**

### **3.1 *Email Templates***

Templates have your styling, logo and colors -usually the graphics in the top and bottom banner of your default emails.

You can have multiple Templates:

Master will be your regular logo and colors that you will probably use 99% of the time, however you may also have a Personal Training template that has a different logo.

When you create a New Email, select the template, add content (content is only created once; *you do not need to create PlainText and HTML*), add details.

From Name is defaulted to Club Name entered in Admin-Club Details; however you can select Lead/Member Owner. Each email will show the Staff Member responsible for that Lead /Member.

Email From Address is defaulted to the Club Email entered in Admin-Club Details, however you can select Lead/Member Owner. Each email will show the email address of the Staff Member responsible for that Lead/Member. If the Lead/Member replies it will go back to that Staff Member.

*Email Address must be included in Staff Roster details.*

