Release Notes

InTouch Follow-Up v5.7.0

Contents

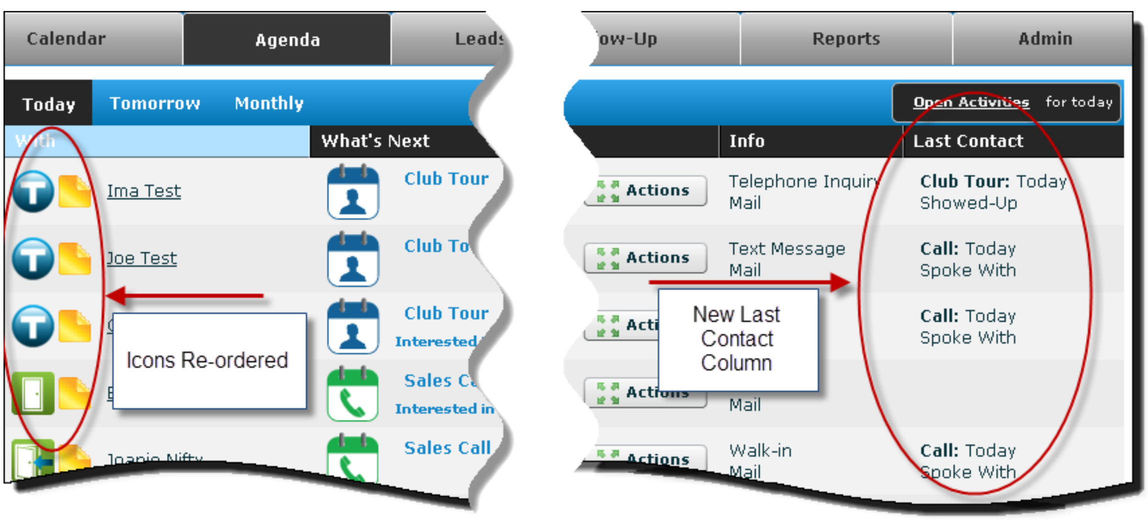
1 Product Release Information

Product	InTouch Follow-Up
Release number	5.7.0
Release date/details	November 14, 2011 9pm PT Possible downtime of up to 30 min
Contact	For more information, please contact support@intouchfollowup.com

2 New Features

2.1 Last Contact shown on Leads and Agenda tabs

This feature introduces a new column to the "**Leads"** and "**Agenda**" tabs so users can quickly see what the "***Last Contact"*** with the lead was before they call a lead or take a club tour. In order to present this data we have altered the layout of the columns in this tab to make it more intuitive to the user.

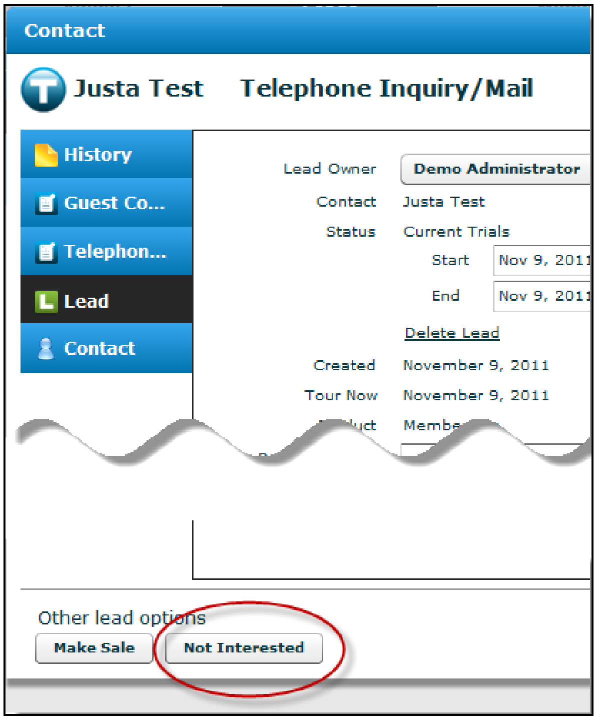


Icons have been re-ordered to provide a more logical presentation of the information. The new "***Last Contact"*** column displays the type of communication that last occurred with the customer and when that occurred.

This enhances the quality of conversation with the lead and allows the staff person to prioritize their calls more efficiently.

2.2 Not interested (reason)

When a lead is marked as **"Not Interested"-** sales person is now required to add a reason why e.g. Wrong Location, no time, joined another club etc.
A report on reasons why leads are **"Not Interested"** will be available in a later version of InTouch but for now you can start capturing the information as follows.

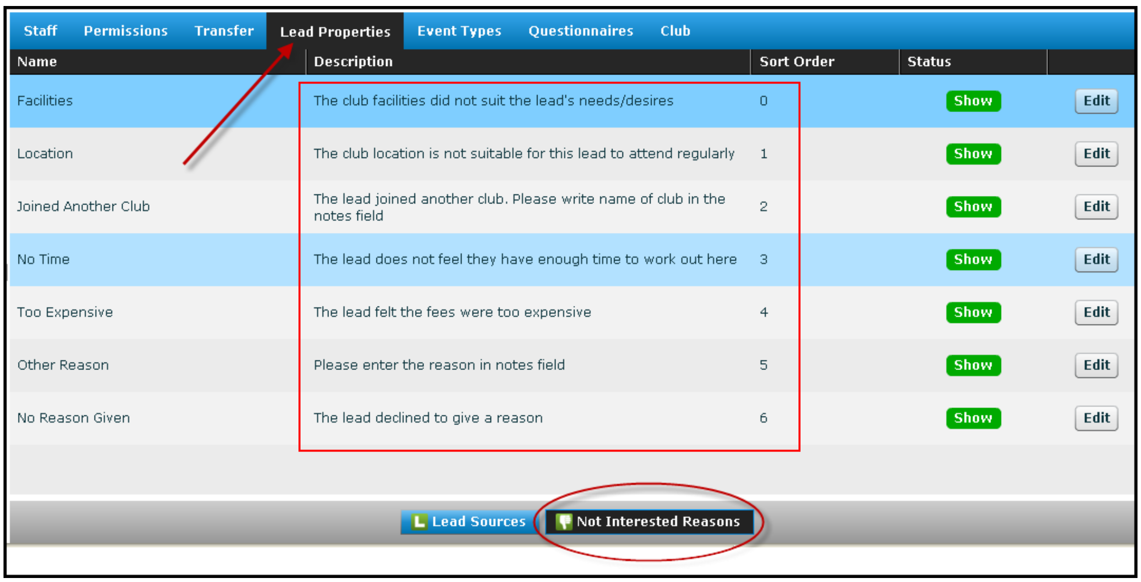


2.3 *Lead Sources tab renamed as Lead Properties tab*

As we have introduced a new dropdown pick list we have also given you the ability to create your own **"Not Interested Reasons"** in a similar way to how you can create "**Lead Sources"** in the "**Admin"** tab.

The **"Not Interested Reasons"** shown in the dropdown box (above) can be created by your administrator in the "**Admin tab"->"Lead Properties" tab** (below).

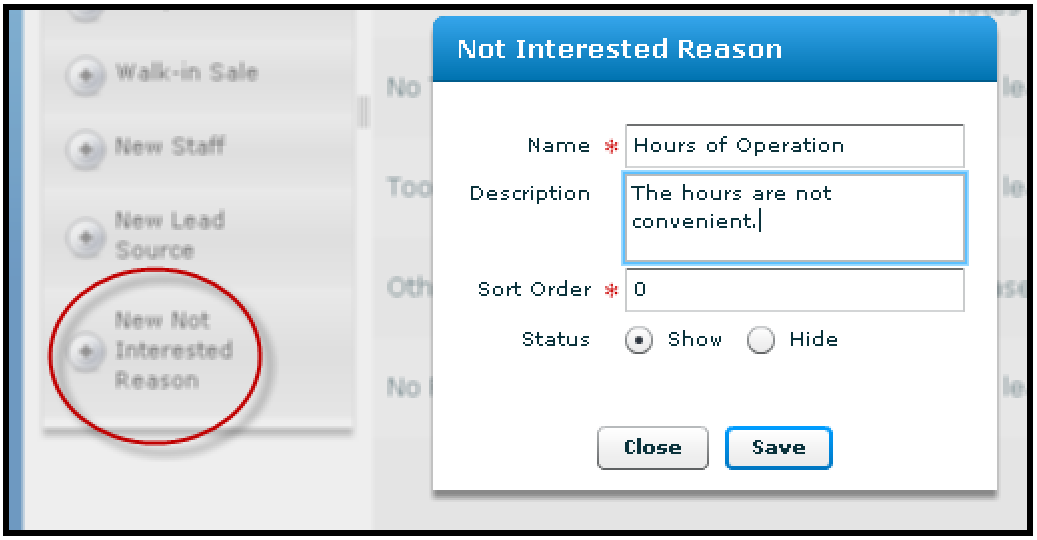
- Go to "Admin" tab
- Click on "Lead Properties" tab
- Click on "Not Interested Reasons" at the bottom of screen
- Click on "+New Not Interested Reason" in the Quick Links menu on the left


Staff Permissions Transfer Lead Properties Event Types Questionnaires Club

Name	Description	Sort Order	Status	
Facilities	The club facilities did not suit the lead's needs/desires	0	Show	Edit
Location	The club location is not suitable for this lead to attend regularly	1	Show	Edit
Joined Another Club	The lead joined another club. Please write name of club in the notes field	2	Show	Edit
No Time	The lead does not feel they have enough time to work out here	3	Show	Edit
Too Expensive	The lead felt the fees were too expensive	4	Show	Edit
Other Reason	Please enter the reason in notes field	5	Show	Edit
No Reason Given	The lead declined to give a reason	6	Show	Edit

Lead Sources Not Interested Reasons

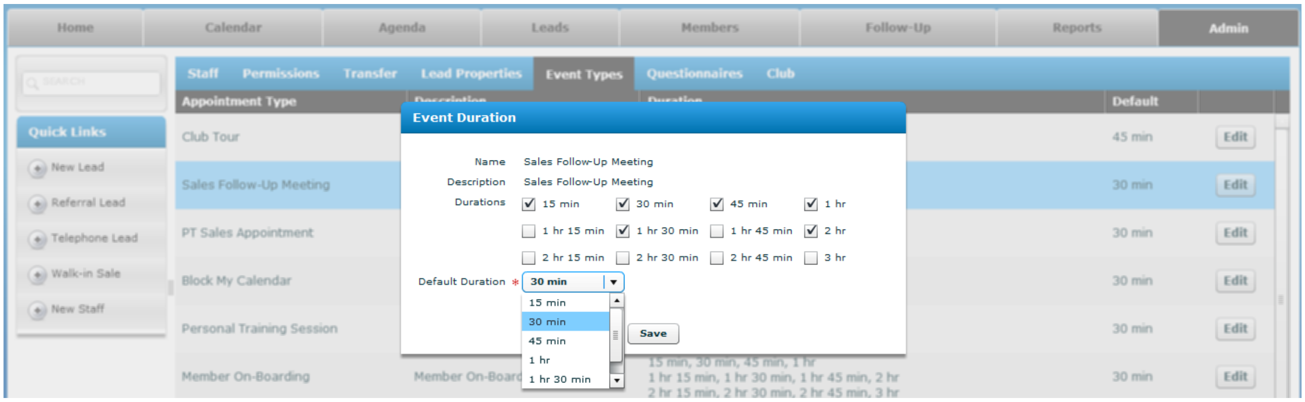
Leads give many reasons for not wanting to join but these usually fall into about 5 or 6 general categories. We recommend limiting your **"Not Interested Reasons"** to no more than 6 reasons, so your data capture is easy and your report is useful.



2.4 Setting Calendar Event Durations

You can now alter the event durations for appointments that appear in your appointment booking dropdown lists, to those durations you use most regularly.

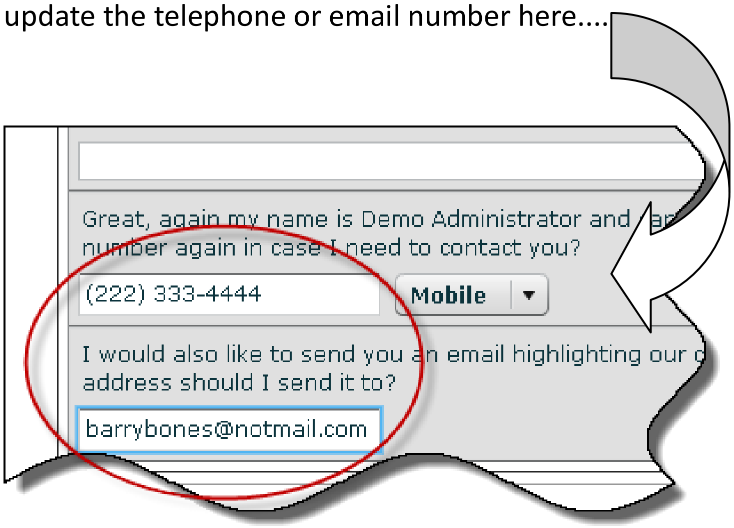
- Go to **"Admin"** tab
- Click **"Event Types"** tab
- Click **"Edit"** next to the appointment type you want to set
- Tick only the event durations you wish to see for this appointment
- Pick a **"Default Duration"** - this is a required field.
- Click **"Save"**
- Now only the durations you picked will appear in your calendars when scheduling an appointment



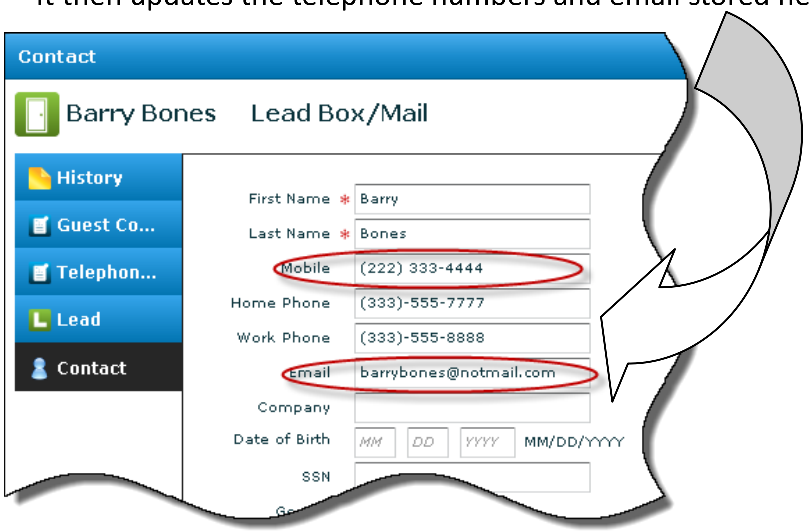
3 Enhancements

3.1 Updating Contact Fields from Telephone Script

Some users have a telephone field and an email field in their "**Telephone Inquiry Script"**. This enhancement now ensures that any change to phone and/or email details within this script immediately updates the Lead's contact details. So that means when you update the telephone or email number here....

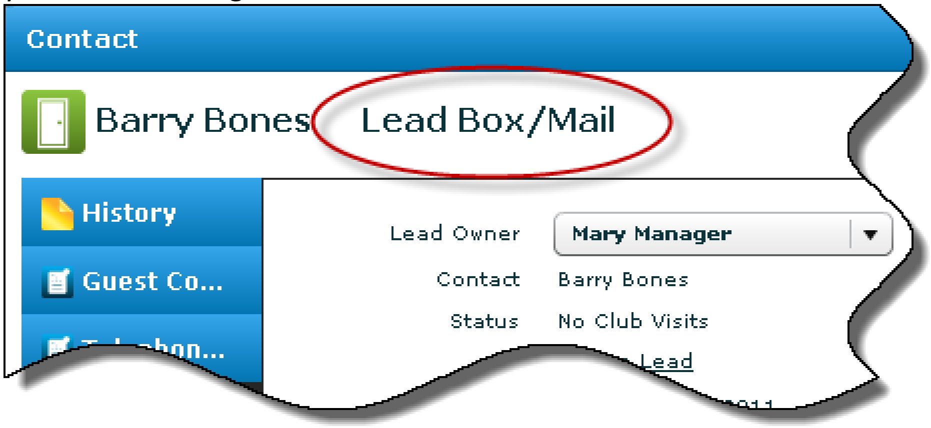


It then updates the telephone numbers and email stored here.



3.2 View the Lead Source and Contact Method- Improvement

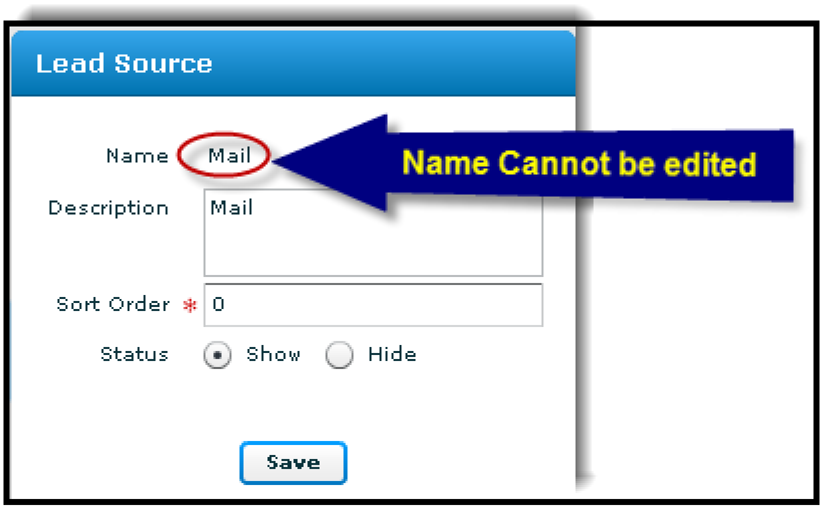
This enhancement makes the "**Lead Source**" and **"Contact Method"** more visible when you are contacting a lead.



3.3 Editing Lead Sources in the new Lead Properties tab

If you need to add/edit **"Lead Sources",** you can now find this in the renamed **"Lead Properties"** tab.
Users are no longer able to edit the title of **"Lead Sources"** that already exist. This ensures that historical report data that was captured under the existing Lead Source title is not changed and as such your reports remain relevant to the correct **"Lead Sources"**.

Tip: If you want to change a Lead Source or Not interested Reason name that appears in a dropdown, turn the current one to Hide and add a new Lead Source.

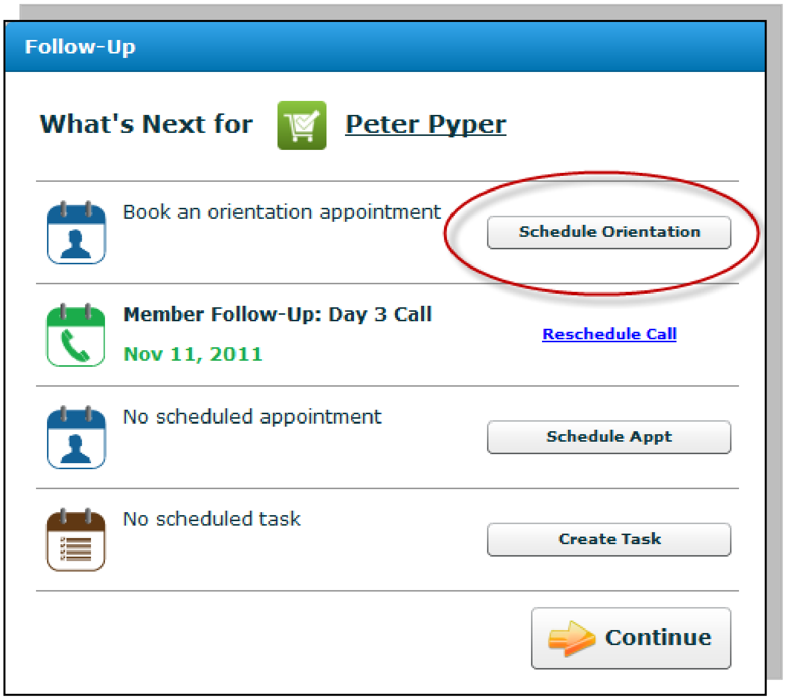


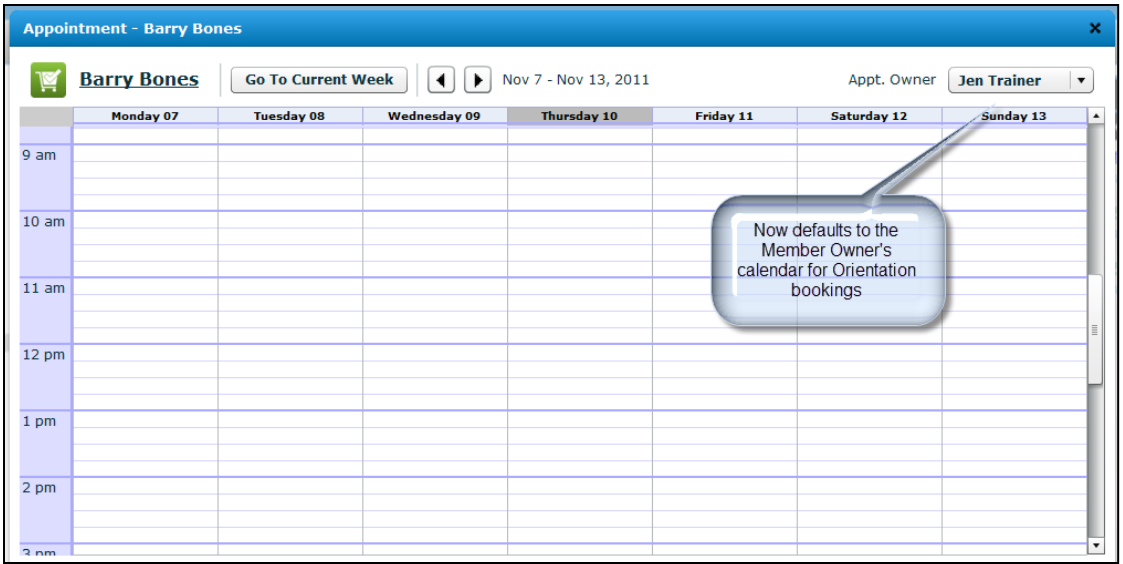
3.4 *Booking Orientation after Sale - Improved flow*

After completing a sale, you already have the option of immediately booking an orientation appointment. This feature has been improved as follows: -

- The Calendar for booking the orientation appointment has the same look and feel as the standard "Calendar" tab in InTouch.
- The "Calendar" now defaults to the **"Assigned Member Owner's"** calendar
- The "**Appt. Owner**" drop-down in the "**Calendar**" allows the user to view and book all orientation trainers based on their availability/schedule.

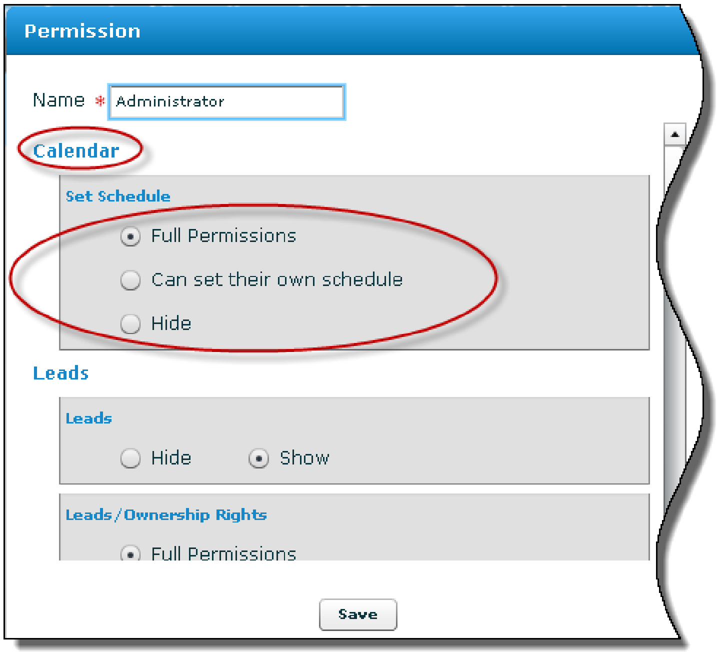
Tip: To add Orientation trainers - go to the Calendar Tab and add Orientation Trainers to the Orientation Trainer Group





3.5 "Set Schedule" Permissions

A new **"Permission"** now permits staff to: set ALL staff schedules **("Full Permissions"**), set their own schedule only **("Can set their own schedule"),** or hides the ability to set staff schedules entirely **("Hide").**



4 Resolved Issues

4.1 Outbound Text Messages

In earlier versions of InTouch, when outbound text messages were replied to by your leads, a new lead would be created, regardless of whether or not the lead already existed in InTouch. This resulted in duplicate leads. InTouch will now only create a new lead from an inbound text message if the lead does not already exist.

4.2 Prevent ability to schedule appointments in the past

Staff can no longer add appointments to the **"Calendar"** if the date was in the past.