Release Notes

InTouch Follow-Up v5.8.0

Contents

1 Product Release Information

Product	InTouch Follow-Up
Release number	5.8.0
Release date/details	December 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 Reports - New ALL Leads CSV Export Report

This report is similar to the current Active Leads CSV export and Won Leads CSV report - it shows ALL LEADS exported to a CSV file so you can open it in excel and sort or filter or mail merge the data to suit your needs.

2.2 Reports - New Not Interested Reason Report

In version 5.7.0 we gave you the ability to start capturing the reasons why leads were being marked as Not Interested. As promised this release brings you a report to see what reasons are being recorded by each Lead Owner as follows: -

Not Interested Reasons Report

Club: [illegible]

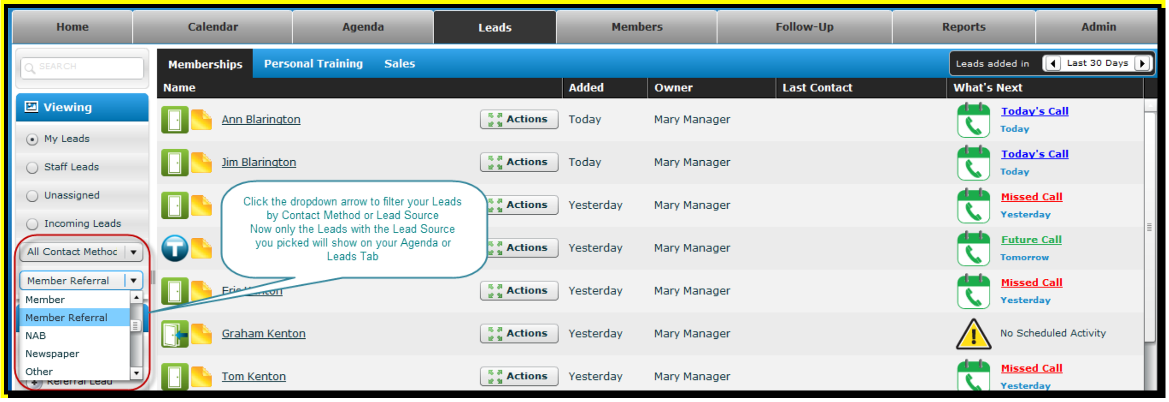
For December 09, 2011

	Facilities	Joined Another Club	Too Expensive	Total
Charlie Brown	1	1	1	3
Club Total	1	1	1	3

Report Generated On December 09, 2011

2.3 Filters Agenda and Leads Tab by Lead Source & Contact Method

Some users have requested the ability to filter all their leads on their agenda or leads tab by contact method or lead source so that they can prioritise calls to a particular Lead Source for example a 12 days of Christmas campaign where to need to call everyone before Christmas.
This feature introduces two new drop down filters in the left hand menu -click on the dropdown arrow and pick one of the Lead Sources and only the leads with that lead source will be displayed on your screen.



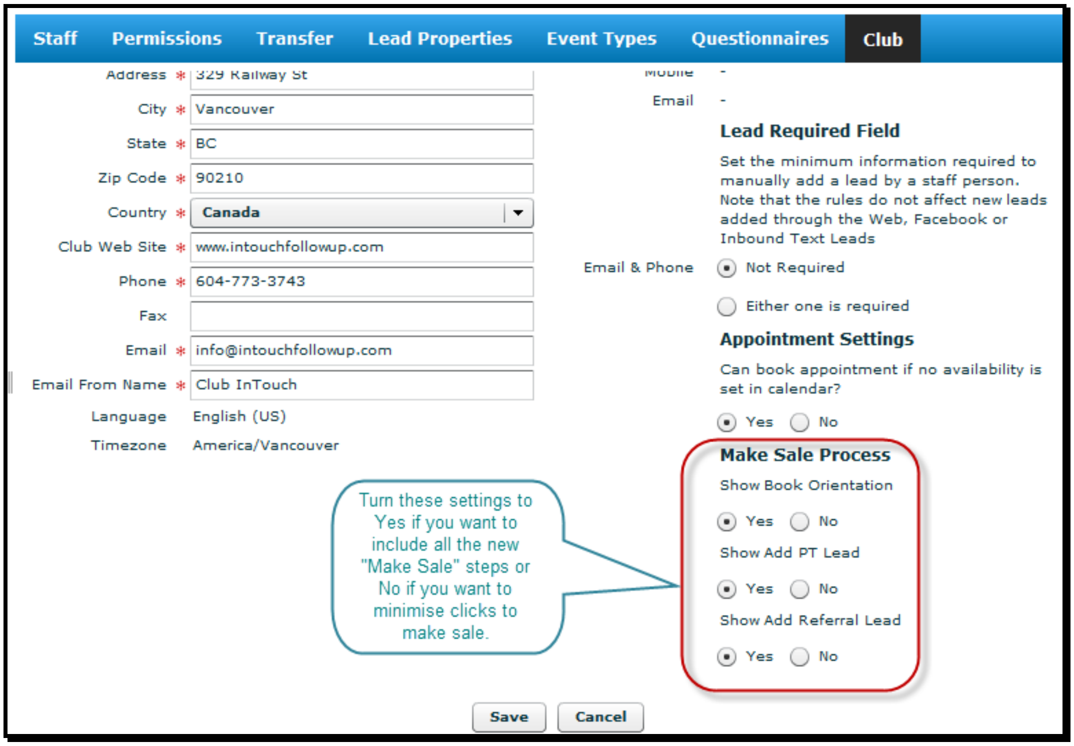
3 Enhancements

3.1 New Make Sale Process

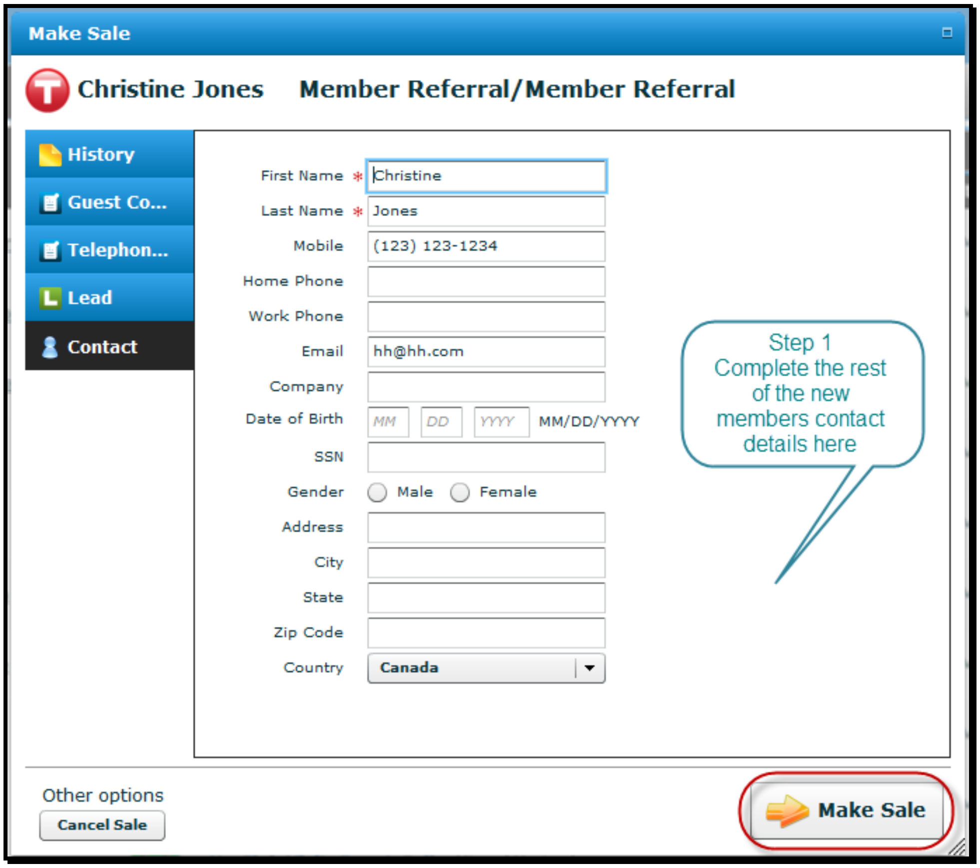
Based on feedback from a number of visits to clubs who are using InTouch we have enhanced the Make Sale process to achieve the following objectives: -

1. Make it more Intuitive and easier to step through step by step rather than present one large screen of fields to complete.
2. Encourage Sales people to book an orientation for a new member at time of sale so you get more members started at the club.
3. Encourage Sales people to get Personal Training Leads or Sell PT at time of sale so you get more PT Leads and sales.
4. Encourage Sales people to ask for new Lead referrals from new member at time of sale so you get more member referral leads and increase your sales.
5. Steps 2-3 above can be turned ON/OFF for a club in the club permissions within admin.

First set- up your Permissions - Go To Admin -> Club and click Edit

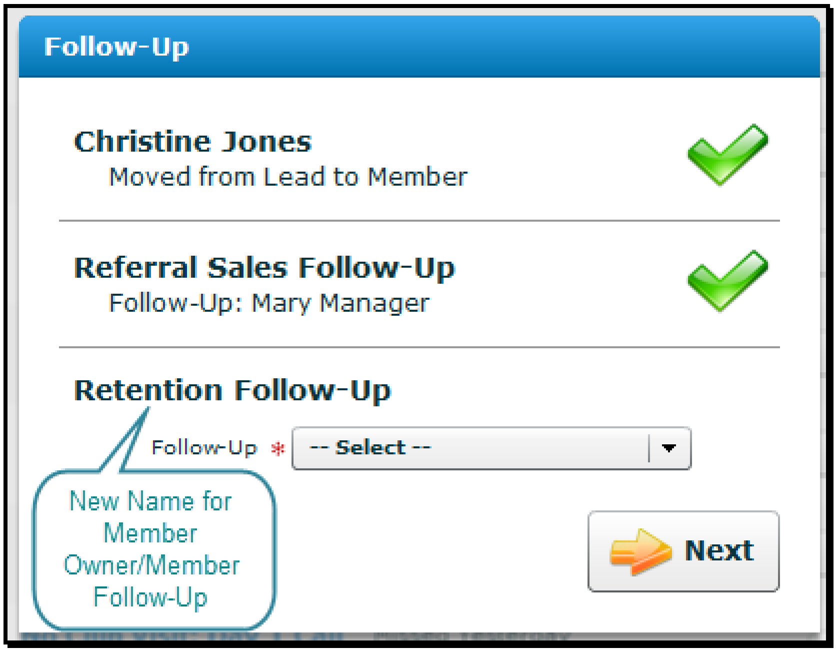


Step 1 - Click Make Sale anywhere in the application and this window will pop up.



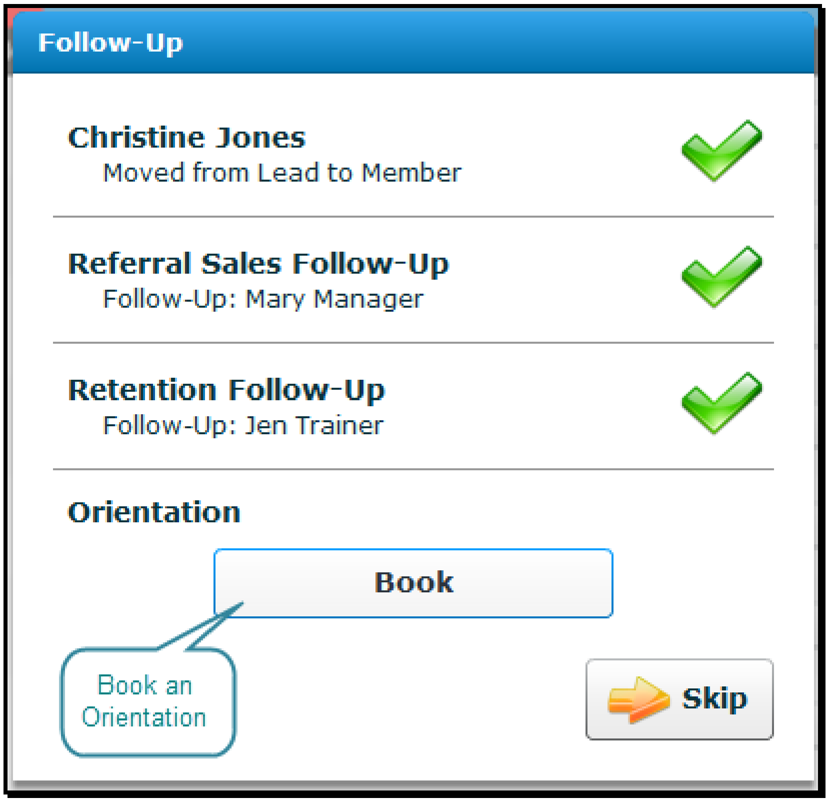
Click Make Sale

Step 2 - Assign a Retention Follow Up owner to the new member (this used to be called Member Owner). The staff member assigned will be responsible for making retention calls to the member that you have scheduled in your member follow up.

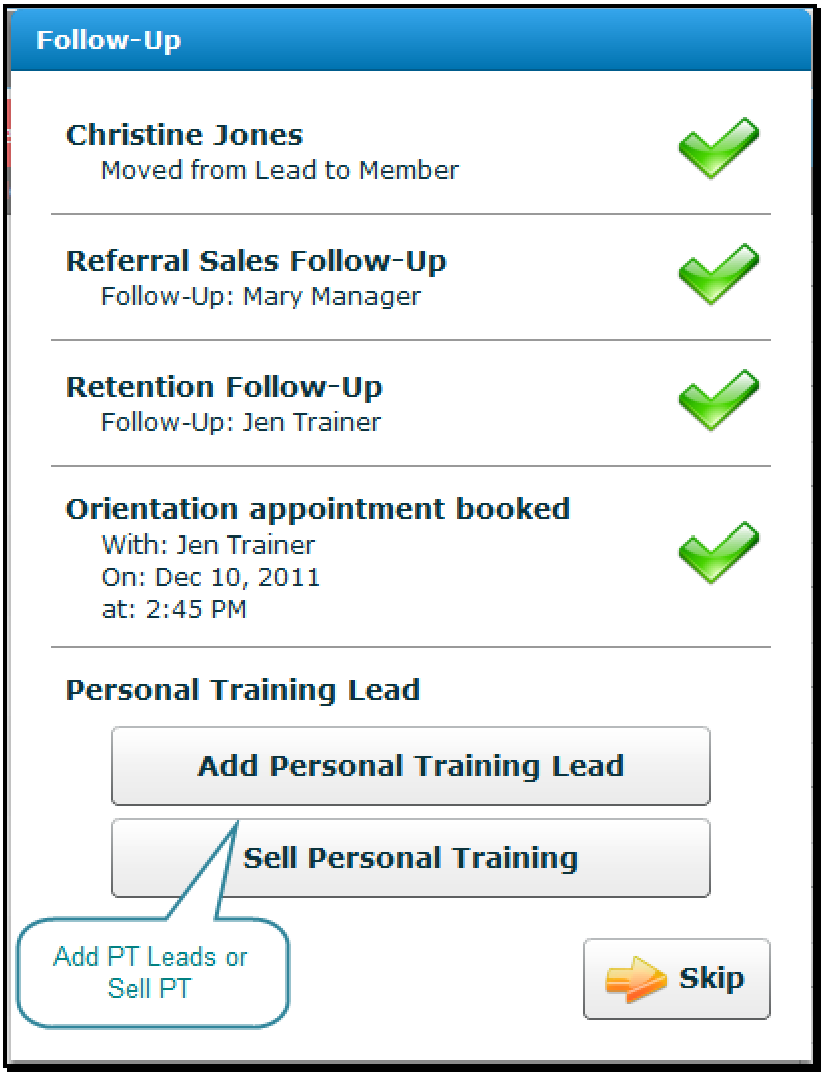


If you have permission set to NO then this is the last step but if any permissions are set to YES you will proceed to the relevant steps below.

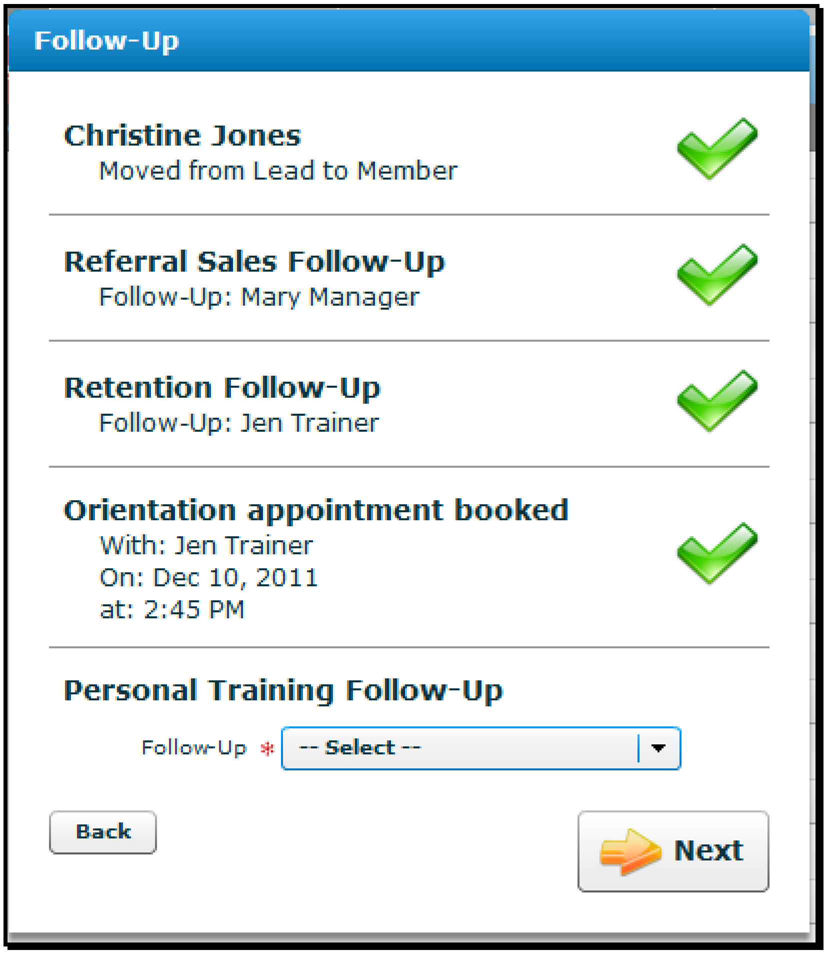
Step 3- Book an Orientation Appointment



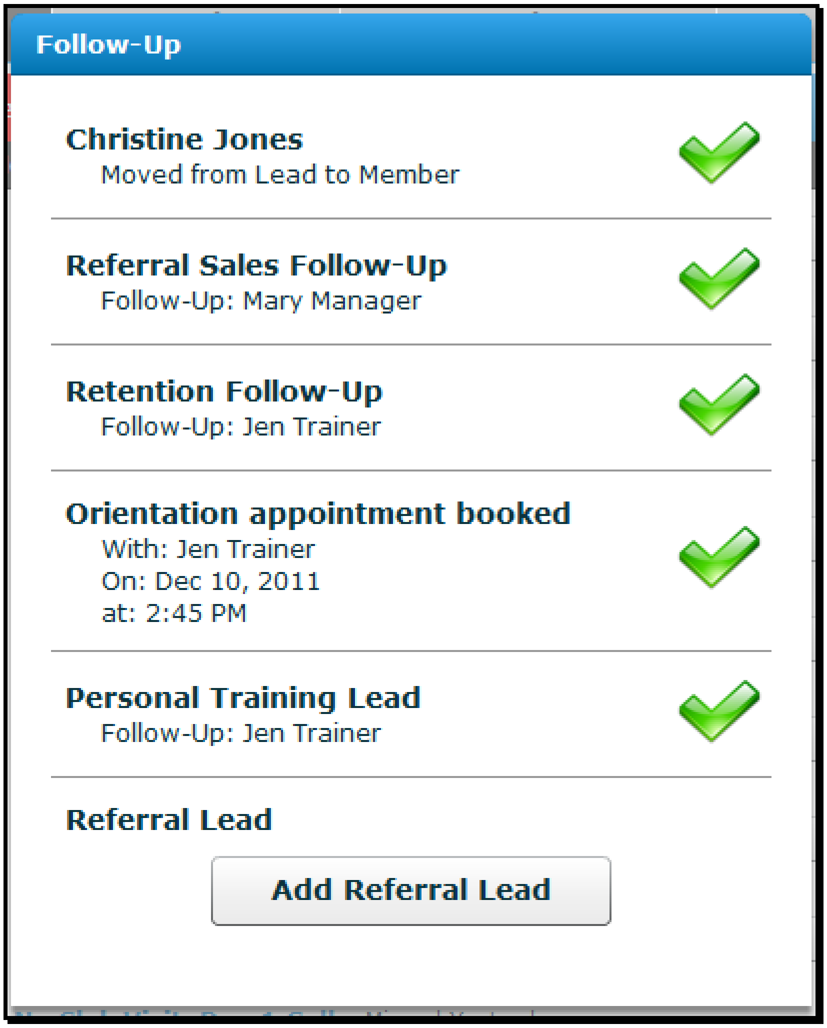
Step 4- Add a Personal Training Lead or Sell Personal Training



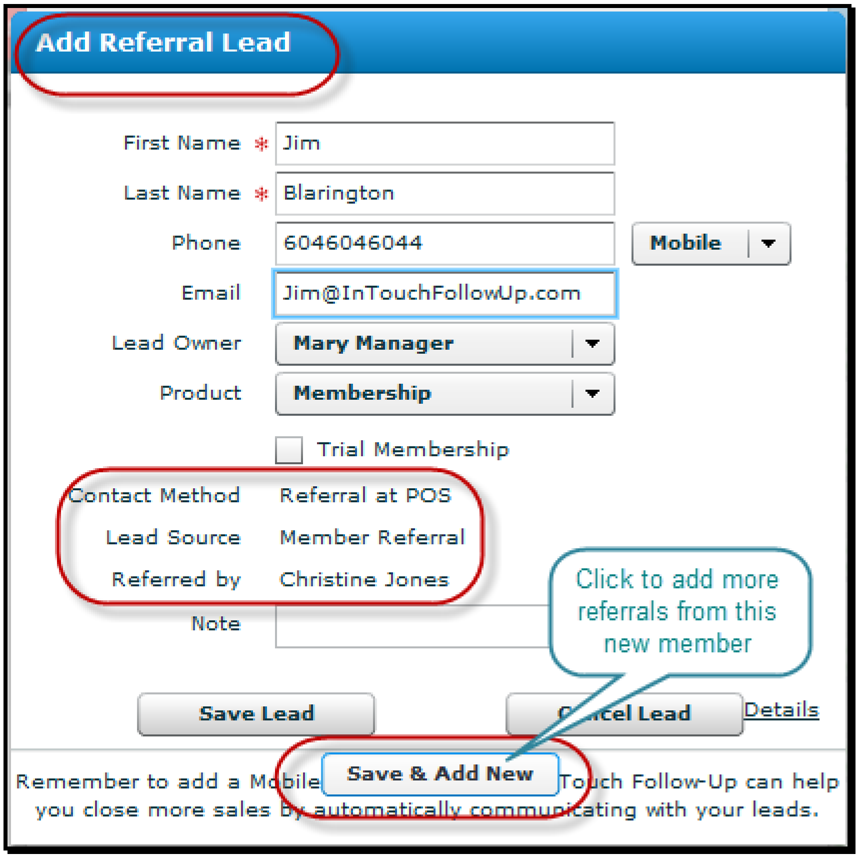
Step 5- Assign a Personal Trainer to follow up a PT Lead or PT Sold.



Step 6- Ask the new member for referrals- click Add Referral

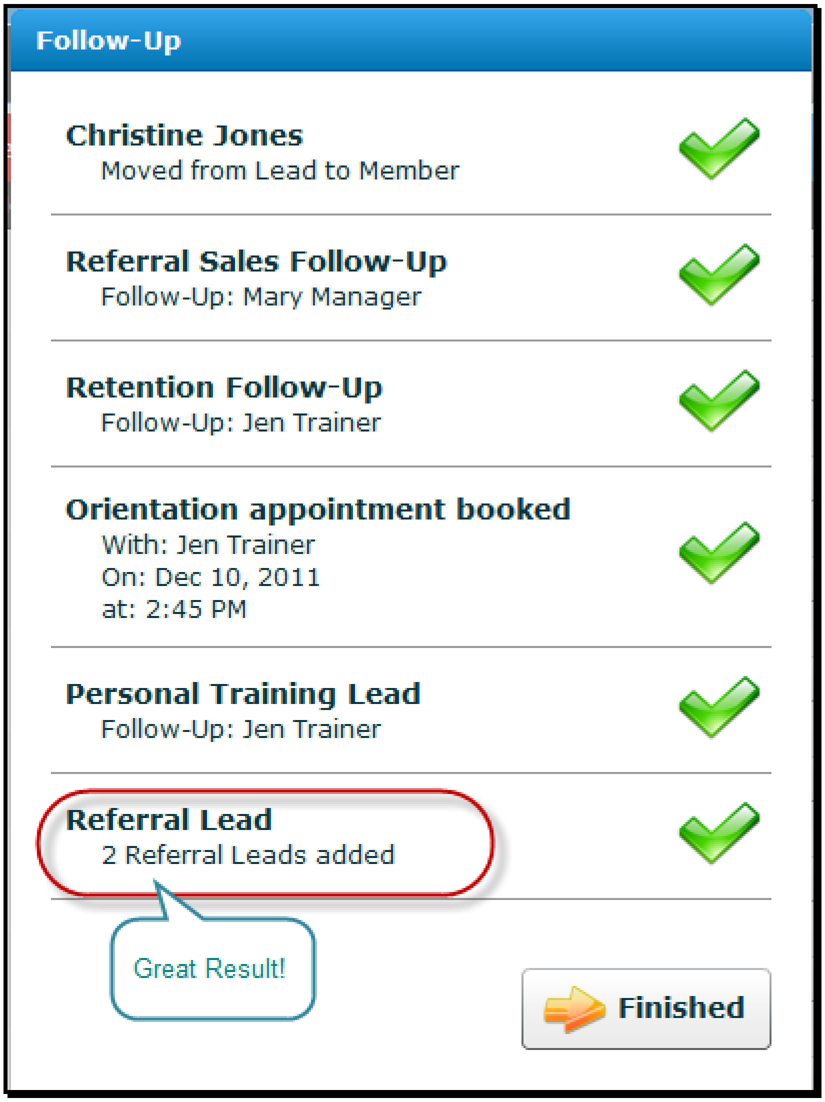


Step 7- The Add referral lead screen pops up and already has the Contact method and Lead source set so all you have to do is add the new lead's name, phone number and/or email address. Once you have entered those details then: -



- If there are no leads simply click "Cancel lead"
- If there are multiple leads click "Save & Add New"
- If there is just one Lead referral click "Save"

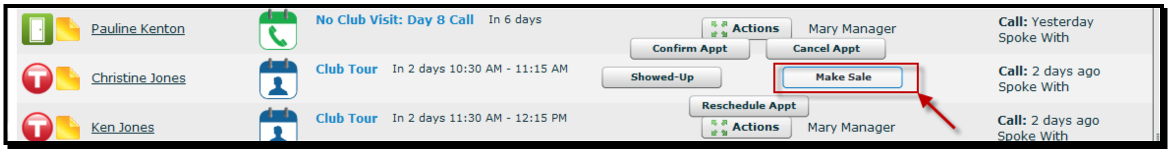
Step 8 - Confirmation appears of your completed sale and all the activity captured for this new member



Remember: If you have permission set to NO then this process is a 2 step process. However if you want your team to be reminded to complete ALL the steps above then set your permissions to YES. (See here for how to set these)

3.2 New Make Sale button on Appointment Actions button

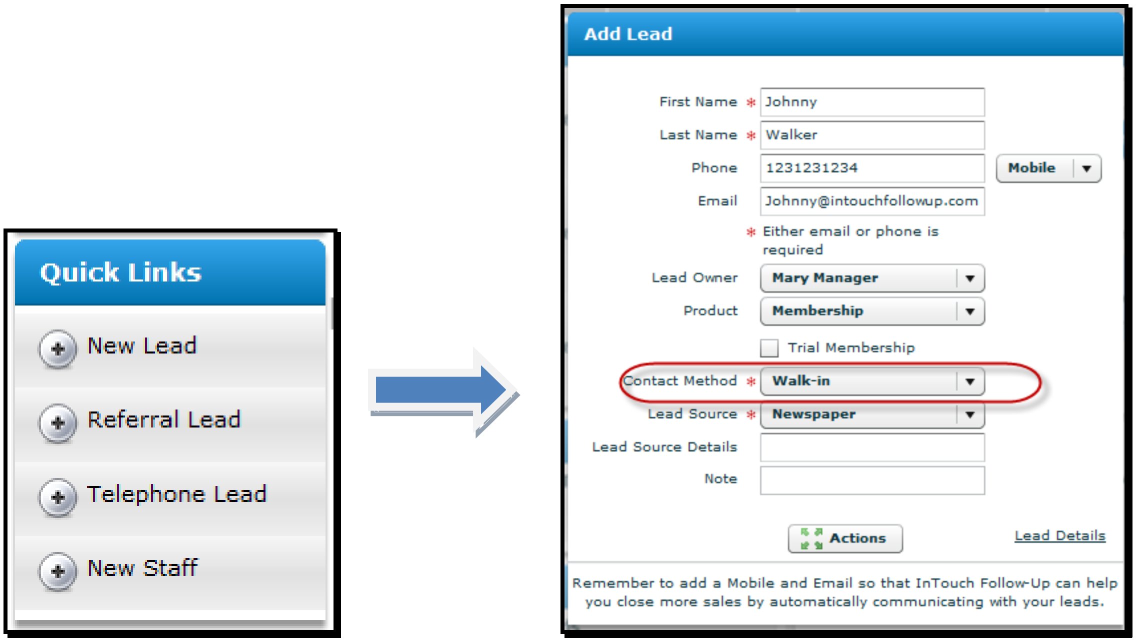
We had feedback from users that they would like to be able to click Make Sale directly from the agenda for appointments scheduled on their agenda. so we have added the Make Sale button to the Actions button on the Agenda as seen below.



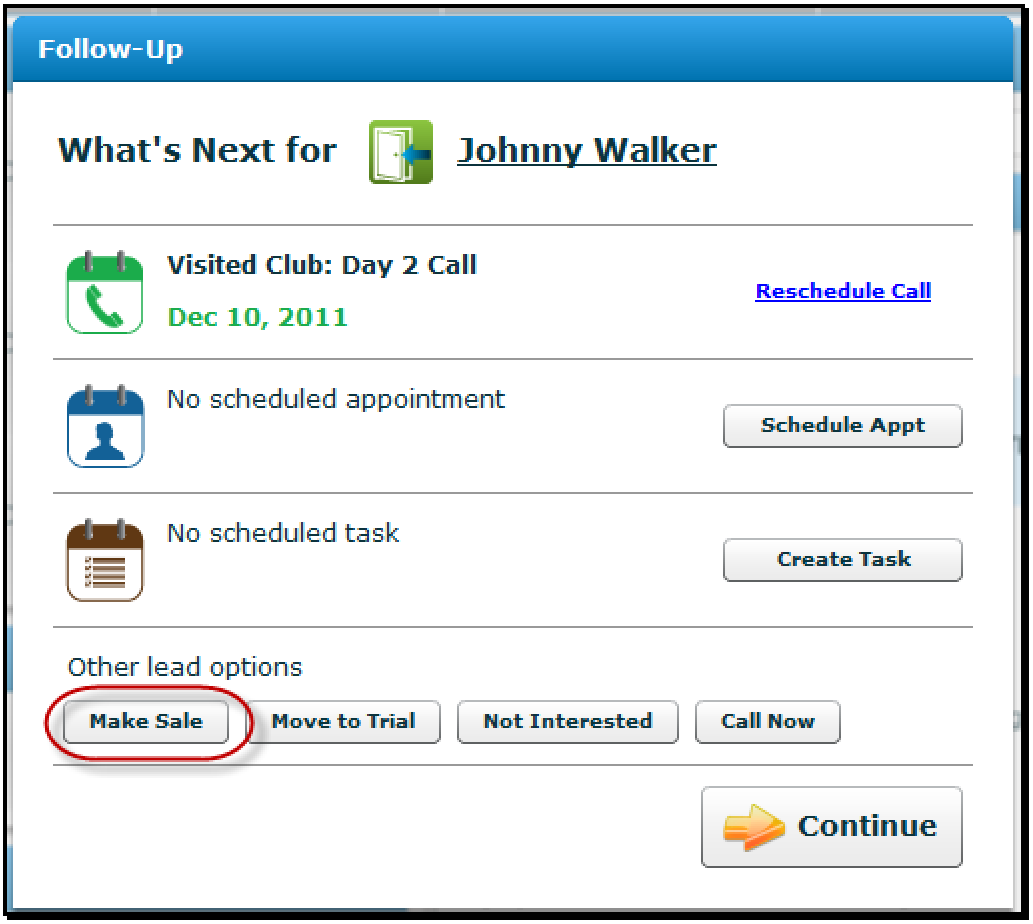
3.3 Walk-In Sale button removed

The Walk-in sale button has been removed as the feedback we received is that this was confusing to many of our users.

To add a Walk-in sale now complete the following steps:-



- Click "+New Lead" and Add the Lead With a Contact Method = Walk-In
- Click Save and the Follow Up window appears as shown below
- Click Make Sale

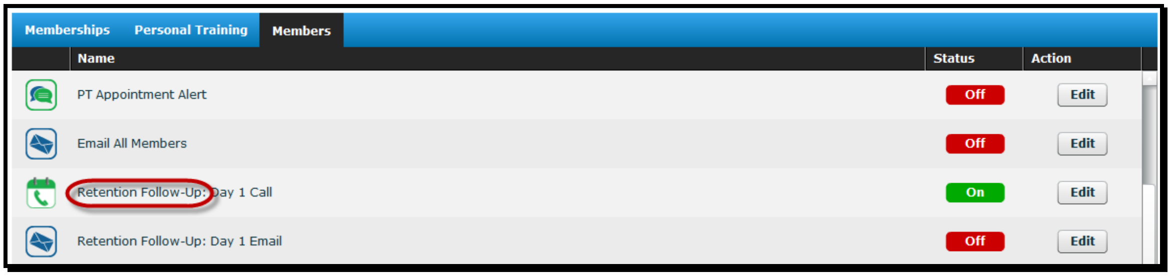


Now Follow the steps shown in the [Make Sale](#) process shown [above.](#)

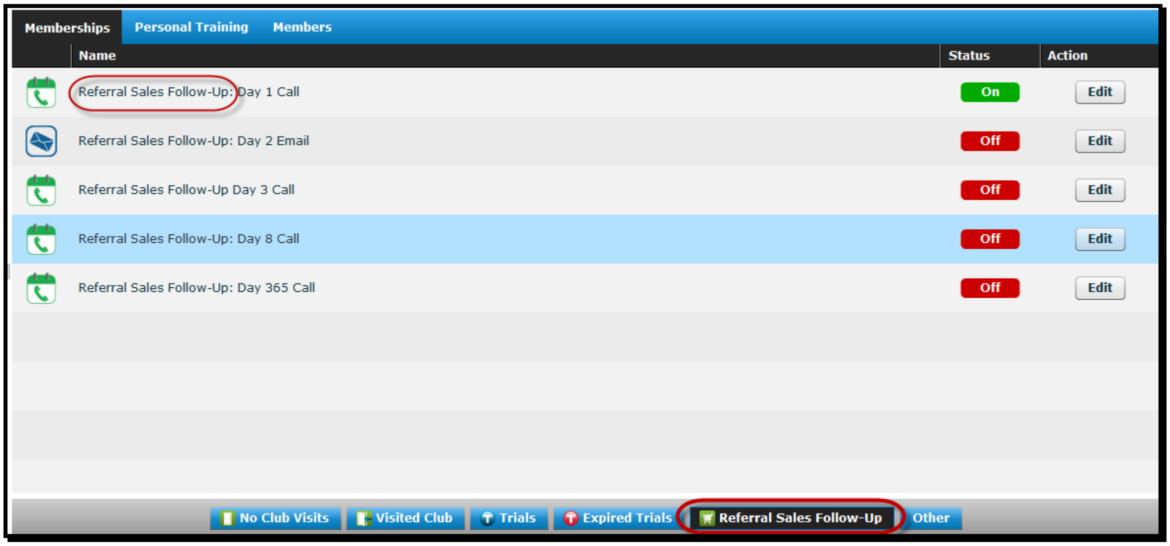
3.4 Rename Follow-up events to match Make Sale process

As you can see from the above Make Sale process we renamed some of the steps such as renaming Member Follow Up as Retention Follow Up. This is because we heard from our users that they were confused what Member follow up means and what the difference was between this and Sales Follow-up calls. So here are the new names for Follow-up events: -

Retention Follow-up - Used to be called Member Follow Up - this is when a trainer or retention manager calls or emails a new member to ensure they are getting started with using the club.



Referral Follow-up - Used to be called Sales Follow Up - this is when a sales person calls the new member up to check they are happy with their purchase and are using the club but mainly to ask for referral leads.



4 Resolved Issues

4.1 Prevent Multiple Clicks of Save Lead buttons

Some users were double clicking save buttons resulting in duplicate leads being added to the database. This fix aims to resolve this issue.

4.2 Permissions fixed for Appointment Settings with No availability

Fixes the issue where Club permissions for Appointment Settings - "Can book appointment if no availability is set in calendar?" were set to Yes/No but behaved in the same way.
Now when these are set to: -

- Yes- appointments can be scheduled even if user has not set up their schedule in calendar
- No- appointments can ONLY be scheduled IF user has set up their schedule in calendar