

Release Notes

InTouch Follow-Up v5.9.0

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1 Product Release Information

Product	InTouch Follow-Up
Release number	5.9.0
Release date/details	March 20, 2012 9pm PT Possible downtime of up to 30 min
Contact	For more information, please contact support@intouchfollowup.com

2 New Features

2.1 Event Names - Ability to Customise and add new events

A number of clients have asked if they can rename appointments such as "Club Tour" to the name they use in their club, or to remove certain appointments from member dropdowns calendar for example, so that they don't have such a long list of appointments that they may never use.

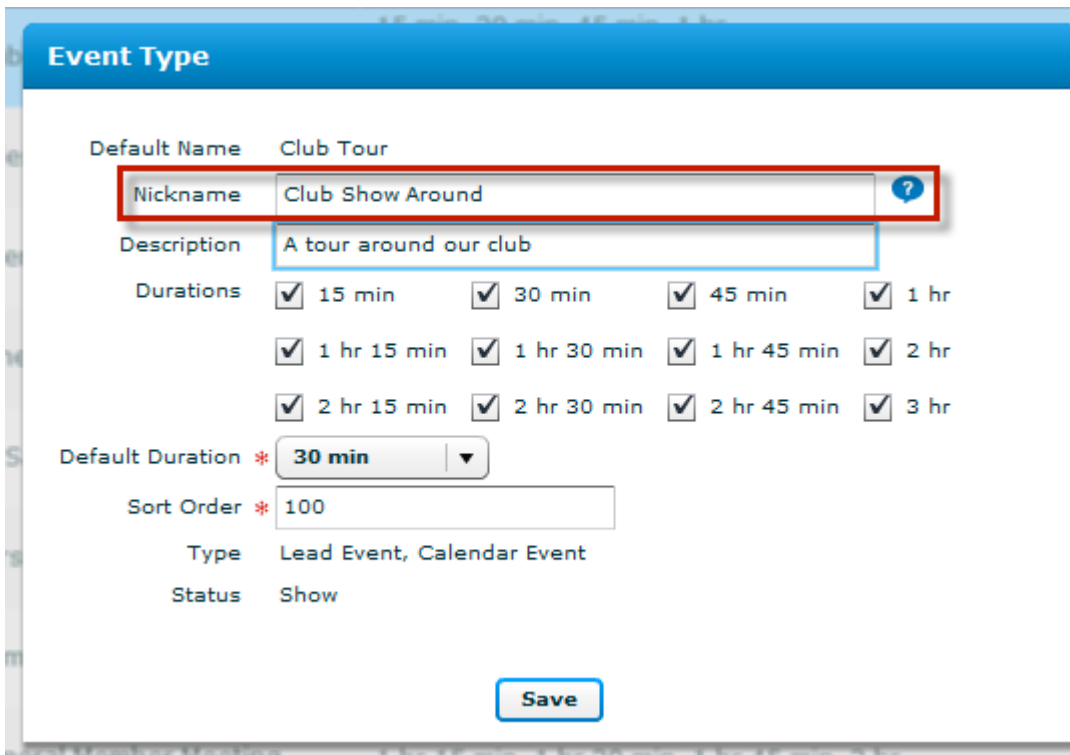
This new feature enables you to do the following: -

- Add a your own New Event Type (appointment)
- Choose which calendars your events appear for i.e. Calendar, Membership Lead Calendar, Member Calendar, PT Lead Calendar.
- Set which order events appear in your dropdown list
- Rename default InTouch system events with your own names e.g. rename "Orientation" to "Intro to Exercise".

Event Type	Event Name	Duration	Sort Order	Status	Default	Edit
Lead Event, Calendar Event	Club Tour	15 min, 30 min, 45 min, 1 hr 1 hr 15 min, 1 hr 30 min, 1 hr 45 min, 2 hr 15 min, 2 hr 30 min, 2 hr 45 min,	100	System	30 min	Edit
Member Event, Calendar Event	Sales Follow-Up Meeting	15 min, 30 min, 45 min, 1 hr 1 hr 15 min, 1 hr 30 min, 1 hr 45 min, 2 hr 15 min, 2 hr 30 min, 2 hr 45 min,	200	Show	30 min	Edit
Member Event, Calendar Event	Personal Training Session	15 min, 30 min, 45 min, 1 hr 1 hr 30 min	300	System	30 min	Edit
PT Lead Event, Membership Lead Event, Calendar Event	Personal Training Assessment	15 min, 30 min, 45 min, 1 hr 1 hr 15 min, 1 hr 30 min, 1 hr 45 min, 2 hr 2 hr 15 min, 2 hr 30 min, 2 hr 45 min, 3 hr	400	Show	30 min	Edit
PT Lead Event, Calendar Event	PT Sales Appointment	15 min, 30 min, 45 min, 1 hr 1 hr 15 min, 1 hr 30 min, 1 hr 45 min, 2 hr 2 hr 15 min, 2 hr 30 min, 2 hr 45 min, 3 hr	500	System	30 min	Edit
Member Event, Calendar Event	Personal Training Session	15 min, 30 min, 45 min, 1 hr 1 hr 15 min, 1 hr 30 min, 1 hr 45 min, 2 hr 2 hr 15 min, 2 hr 30 min, 2 hr 45 min, 3 hr	600	Show	30 min	Edit
Member Event, Calendar Event	Member On-Boarding	15 min, 30 min, 45 min, 1 hr 1 hr 15 min, 1 hr 30 min, 1 hr 45 min, 2 hr 2 hr 15 min, 2 hr 30 min, 2 hr 45 min, 3 hr	700	Show	30 min	Edit
Member Event, Calendar Event	General Member Meeting	15 min, 30 min, 45 min, 1 hr 1 hr 15 min, 1 hr 30 min, 1 hr 45 min, 2 hr 2 hr 15 min, 2 hr 30 min, 2 hr 45 min, 3 hr	800	Show	30 min	Edit

2.1.1 How to use this feature: -

- Go to Admin ->Event Types
- Choose the System event you want to edit
- Click Edit
- Type a new name in the Nickname box
- Change the number in the sort order box to bring it up or down the list



Event Type

Default Name Club Tour

Nickname Club Show Around

Description A tour around our club

Durations 15 min 30 min 45 min 1 hr
 1 hr 15 min 1 hr 30 min 1 hr 45 min 2 hr
 2 hr 15 min 2 hr 30 min 2 hr 45 min 3 hr

Default Duration * 30 min

Sort Order * 100

Type Lead Event, Calendar Event

Status Show

Save

- Go to Admin ->Event Types
- Choose the Add New Event button on the left hand side
- Type your event name in the Name field
- Choose a default duration
- Change the number in the sort order box to bring it up or down the list
- Tick the "What event Type is this?" boxes as follows: -
 - Lead Event - event appears on either the Membership Lead or PT Lead event dropdown when scheduling appointments for these type of leads
 - Member Event- event appears on the Member event dropdown when scheduling appointments for members
 - Calendar Event- event appears on the event dropdown when scheduling appointments from the calendar tab.
- Click Show/Hide-Show means the event will be available for all staff to book and

an SMS alert will be created for that event; Hide will hide the event so it cannot be booked and no SMS alerts will appear.

- Go to the Follow-up Tab->Text Alerts tab - here you will see the new SMS Alert and you can Edit this to change the SMS content and turn the alert to ON.

Event Type

Name *

Description

Durations

<input checked="" type="checkbox"/> 15 min	<input checked="" type="checkbox"/> 30 min
<input checked="" type="checkbox"/> 1 hr 15 min	<input checked="" type="checkbox"/> 1 hr 30 min
<input checked="" type="checkbox"/> 2 hr 15 min	<input checked="" type="checkbox"/> 2 hr 30 min

Default Duration *

Sort Order *

What type of event is this? ?

Lead Event

Product *

Member Event

Calendar Event

Status Show Hide ?

Name your own event

Choose where it appears in the list of events

Choose which calendars it appears in

2.2 New Text Alerts Tab

In the Follow Up tab all Text/SMS alerts were previously shown mixed in with the emails and calls for each tab i.e. Memberships, Personal Training and Members tabs. Users have fed back that it is hard to find Text alerts so we have now placed them all on their own tab in Follow-Up.

The screenshot shows the INTOUCH web application interface. The top navigation bar includes 'Home', 'Calendar', 'Agenda', 'Leads', 'Members', 'Follow-Up', 'Reports', and 'Admin'. The 'Follow-Up' tab is selected. Below it, there are sub-tabs: 'Memberships', 'Personal Training', 'Members', 'Text Alerts', and 'Email Templates'. The 'Text Alerts' sub-tab is highlighted with a red box. A callout bubble points to this sub-tab with the text 'New Text Alerts Tab'. The main content area displays a table of text alerts.

Name	Status	Action
Group Ex Intro	Off	Edit
Member On-Boarding	Off	Edit
General Member Meeting	Off	Edit
Orientation	Off	Edit
My special club Tour	Off	Edit
PT Sales Appointment	Off	Edit
Fitness Assessment	Off	Edit
Personal Training Session Amazing	Off	Edit
Sales Follow-Up Meeting	Off	Edit

This screenshot is similar to the one above, showing the INTOUCH web application interface. The 'Text Alerts' sub-tab is highlighted with a red box. A callout bubble points to this sub-tab with the text 'New Text Alerts Tab'. The main content area displays a table of text alerts.

Name	Status	Action
Group Ex Intro	Off	Edit

2.3 Scheduled Events Status Report

This new report allows you to export to a CSV file a list of Membership Leads who have an appointment booked in the past or future, what the appointment type was, who the Lead Owner is and what the current status of this event is.

The report looks like this when opened in excel: -

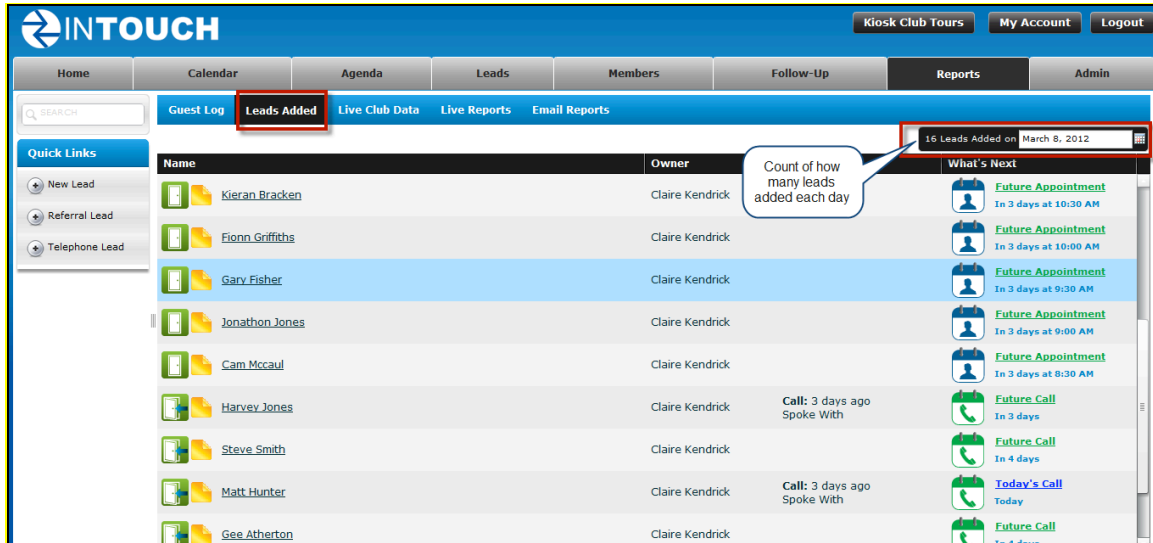
	A	B	C	D	E	F	G	H	I	J	K	L	M
	Lead Owner	Event Type	Event Date	Event Time	Event Status	First Name	Last Name	Mobile	Home Phc	Work Pho	Email	Company	Date Of B
1	Susan Sales	CLUB_TOUR	01/12/2012	20:45:00	Cancelled	Graham	Matthews						
2	Mary Manager	CLUB_TOUR	01/12/2012	22:30:00	Showed Up	Frieda	Hansen						
3	Mary Manager	GENERAL_SALES	01/13/2012	0:00:00	Showed Up	Trevor	Linwell						
4	Claire Training	PT_SALE	01/23/2012	18:45:00	Showed Up	Yury	Callter						
5	Claire Training	PT_SALE	01/23/2012	19:45:00	Showed Up	Harry	Phoner						
6	Mary Manager	CLUB_TOUR	01/23/2012	20:45:00	Showed Up	Yentl	Callter						
7	Mary Manager	CLUB_TOUR	01/23/2012	19:45:00	Showed Up	Yentl	Callter						
8	Claire Training	PT_SALE	01/23/2012	20:15:00	Showed Up	Pat	Post						
9	Claire Training	PT_SALE	01/23/2012	18:45:00	Showed Up	Pat	Post						
10	Claire Training	CLUB_TOUR	02/11/2012	23:15:00	Cancelled	Karen	Krane						
11	Claire Training	CLUB_TOUR	02/12/2012	0:45:00	Cancelled	June	May						
12	Claire Training	GENERAL_SALES	03/02/2012	18:45:00	Cancelled	Harry	Potter						
13	Tony Trainer	CLUB_TOUR	02/15/2012	17:45:00	Cancelled	Claire	Unassigned						
14	Claire Training	CLUB_TOUR	02/09/2012	21:15:00	Showed Up	Jonny	Brown	(111) 222-3333					
15	Claire Training	CLUB_TOUR	02/08/2012	0:15:00	Cancelled	Harry	Potter						
16	Claire Training	PT_SALE	02/13/2012	19:45:00	Showed Up	Darren	Butler						
17	Mary Manager	CLUB_TOUR	02/15/2012	18:25:00	Showed Up	Dubby	Clicker						
18	Mary Manager	PT_SALE	02/13/2012	20:15:00	Showed Up	Carol	Butler						
19	Claire Training	CLUB_TOUR	03/06/2012	20:45:00	Showed Up	S	D						
20	Claire Training	CLUB_TOUR	03/06/2012	21:45:00	Showed Up	June	May						
21	Claire Training	CLUB_TOUR	03/07/2012	17:13:00	Showed Up	Dane	Danesfield	(111) 222-3333			fg@gf.com		
22													

You can find the report in Live Reports near the bottom of the list: -

Guest Log	Leads Added	Live Club Data	Live Reports	Email Reports
Report Name	Report Description			
Membership Sales based on Contact Methods Report	Shows all Leads Won in the selected time frame regardless of created date			View Report
Lead Source Sales Report	Shows membership sales based on lead sources			View Report
Lead Source Lead Report	Shows what lead sources are being effective			View Report
Not Interested Reasons Report	A report of all the reasons why a lead was marked as "Not Interested" per Lead owner			View Report
Won Lead Export Report (CSV)	Export all the won leads for a date range to a CSV file			View Report
Active Lead Export Report (CSV)	Export all leads (except won) for a date range to a CSV file			View Report
ALL Leads Status Report (CSV)	Export All leads (Active and Won) that were created and/or whose status change date is within the date parameter.			View Report
Scheduled Events Status Report (CSV)	A list of all leads with a scheduled appointment in this date range and the current status of that appointment.			View Report
Orientations Booked Status Report (CSV)	A list of the orientation statuses of members according to sold date			View Report

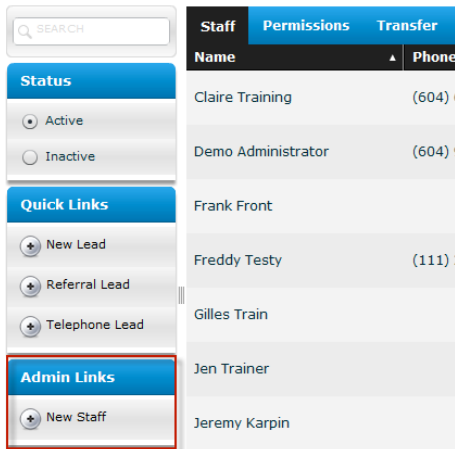
3 Enhancements

3.1 Guest Log- Leads Added



3.2 Add New Staff Quick Link Moved to Admin screens

Users asked us to remove the Add New Staff link from the Quick Links on the left hand panel as they were mistakenly clicking this when adding new leads.



The Add New Staff button now only appears on the following Admin Tabs: -

- Staff
- Permissions
- Transfer

4 Resolved Issues

4.1 Guest Log- Trials Added

Fixes an issue where Leads who were moved to a Trial did not appear on Guest log unless Tour now had been clicked or a completed tour recorded in the calendar first.

Clicking Move to Trial on any lead now ensures this lead shows on the guest log.

Guest Log							Leads Added		Live Club Data		Live Reports		Email Reports		
Time	Name	Activity	Seen By	Owner	Purchase	What's Next	Viewing March 9, 2012								
4:00 PM	 Wade Simmons	Club Tour	Claire Kendrick	Claire Kendrick	7 Day Trial	 Missed Call Yesterday									
4:20 PM	 Ella Darragh	Other	Claire Kendrick	Claire Kendrick	10 Day Trial	 Missed Call Yesterday									
10:44 AM	 Rachel Atherton	Club Tour	Claire Kendrick	Claire Kendrick	9 Day Trial	 No Scheduled Activity									
8:34 AM	 Carol Grange	Walk-in	Claire Kendrick	Claire Kendrick	No	 Today's Appointment Today at 10:00 AM									

4.2 System Cancelled calls - next follow up event is scheduled

Fixes an issue where some follow up events that became overdue for more than 7 days and were therefore cancelled by the system were not being scheduled for the next follow up event.