



Release Notes 8.12

Checkin

Class Activity

Ability to view Contact Info from Checkin Activity Report

Reports, Training, Class Attendance – scroll to bottom, use numbers or arrows to change pages

Financial

Trainer Payroll

Trainer Payroll notes will appear in trainer payroll report regardless of payroll period definition

Reports, Financial, Trainer Payroll – Drill down time period, drill d

Fitness Assessment

Questionnaire

Health Questionnaire now available

Functions, Fitness Assessments, locate member – click Health History Click Health History link, fill out form, Save

Help

Video

Help Video availability returned

Help, Video FAQ Click to play video, if prompted, allow non"safe" video to play. Message due to leaving secure location to an unsecured (YouTube) environment



Marketing

Drip Email

Emails will execute correctly per trigger

Functions, Marketing, Email, Select Drip Marketing, select trigger, set number of days after trigger to send

Point of Sale

Discount Codes

Admin use of Discount Codes will again tally properly

Functions, POS, Discount Codes View Codes, note the "Times Used" columns

Portal

Renew Memberships

Renew Membership from Portal will now properly renew and process.

Member Login, click the Renew Membership Tile

Session Counts

Added totals of Sessions by Location and Session Type

Member Login, click My Info, Sessions section; Tools, System Settings, Member Portal, edit will now display session counts per system settings

Station Matrix

May join classes and book sessions from the Station Matrix

Member Login, click Station Matrix, select class or Avail slot; To turn on Station Matrix for portal, Tools, System Settings, Member Portal – check the Show Station Tile

Manage Tiles

Ability to manage which tiles are displayed on the Member Portal

Tools, System Settings, Member Portal – check the Tiles to have them appear in Member Portal

Reports

Checkin Activity

Will display contact information

Reports, Checkin, Checkin activity Run report, review report for contacts

Trainer Activity

Provided Summary Totals in Session Activity Report

Reports, Training, Trainer Sessions Activity Drill down – pick a date – pick a trainer, note new Summary Counts display

Sales CRM

Log Contact

New Action, Follow-up

Contact History/Log Contact When logging a contact, new Action added, "Follow-Up"

Sales Value Probability

Report displaying Value of Sales by Likelihood of Close by Sales Value

Reports, CRM, Sales Probability Analysis (Use security settings to provide access) In Prospect profile, set Sales Probability, and Sales Forecast. Run report by desired time period. Fields displayed Name, Expected Close Date, Sale Value, Sale Probability, Sale Probability Amount, Actual Sale Amount

Guests/Prospects

New Report to locate all Guests/Prospects never contacted

Reports, CRM, Guests/Prospects never contacted

Scheduler

Spelling Fix

Firstname on custom query is now spelled correctly

Functions, Scheduler, View Scheduler – Drop query to Custom



Services

Add-Ons

When a Service is down defined as No Term with Unlimited sessions ongoing scheduled payments will generate properly

Functions, Services, View Services – From Actions, use Add-ons to share a service.

Scheduled Payments

When a Service with an Add-On rolls, Add-ons will transfer to the new service

Functions, Services, View Services – Scheduled Payments

Tools

POS Quick Links

“Make Service Payment” is working properly

Tools, POS Quick Links Edit, check off Make Service Payment

User Interface

New Quick Links

Clear working area display by moving Quick Links to Tiles on several pages, more pages updating soon

The size can be adjusted from Tools, System Settings, Application Appearance Settings, Tile Width and Tile Height

Users

Appointment Processing

New Security settings for User types Trainer and Administrator to control access to appointment processing options, Done, Late Cancel, No Show, Undo

Functions, Users, Find User, select Security, expand Functions, Expand Schedule