



WI	Version 4.0.9 Feature List
9525	<p><b>Pay Now button.</b>            No need to ask members for new credit card! When a member payment fails, you now have the option of including a “pay now” link in the email or SMS message allowing them to click to pay from their phone or computer. You can also add the link to the Statement email/SMS (sent to members with no payment method on file). When a member pays from the link, they also have the option of designating the new payment method as the primary payment method going forward. Integrated pay processing required. To add the link to your failed payment/Statement email and SMS notifications, edit those in the OE tier→Settings→Email Notifications → click to edit</p>
11439	<p><b>Pinned Notes</b>            Every Member record now has a “pinned” note. This note stays at the top of the member notes at all times. The idea is to store important member info here so you don’t have to scroll through all the member notes to find it. The pinned note also appears on a member’s calendared appointment for easy reference from the calendar.</p>
11439	<p><b>Flagged Notes</b>            Need to flag a note in a member record to remind you to follow up with an issue? Now you can!            When flagged, it will appear at the top of the notes list. When the issue you flagged is resolved, unflag it and it will drop down in the list by date created.</p>
11440	<p><b>Task and Sessions Calendar Changes</b>            For appointments/tasks/sessions scheduled on your iGo calendar, when you click to expand the appointment, the appointment will show membership plan, end date of the plan, member status and pinned notes. There’s also a button you can click to jump to the member record if you need to see more.</p>
11395	<p><b>Electronic Agreement Improvements</b>            Several tweaks were made to improve the electronic agreements feature in iGo. Electronic Agreement signature can now be included in the member signup process. Option to text or email agreement for signature instead of having to sign with your mouse. When a member is buying a membership online, there is now an option to add an agreement for them to sign (i.e., a waiver). Signature block includes member name. Agreement signature block includes date/time signed and IP address. Signed agreement PDFs stored in member record as usual, but now viewable.</p>
10944	<p><b>Referral credit for Members.</b>            You can now set up a referral credit for your members when they refer a member. Once set up, if you sell a new membership and select the member who referred the new member in the “referred by” box, then the credit you set up at the OE tier will be automatically added as a credit to the referring member’s account. To set up a referral credit, go to OE Tier→Club→View All→ Click the club number hot link →Settings→Enter Referral Credit Amount and Save</p>
11254	<p><b>Attendance panel scrolling.</b>            You can now scroll the Attendance Panel to see ALL attendance for the day.</p>
11180	<p><b>Punch Card members to go Terminated when out of punches.</b></p>



	When all the punches in punch card membership are used up, the membership terminates.
10123	<b>Punch Card Report</b> now shows remaining punches on punch card memberships.
11229	<b>Weigh &amp; Measure Day.</b> You can now set a Weigh and Measure day for your members to remind them and you to take measurements. Under the Weights and Measures tab in the member record, click the Add Weigh and Measure Day button to add it. Select the day of the month you want it to appear. When a member scans in, the Welcome Screen will remind them it is Weigh and Measure day, and the member will be flagged on the Attendance panel. There's also a member email and SMS reminder you can activate in the OE tier.
10999	<b>Removed Club Number from From in Email Notifications.</b> Several clients reported it was kind of annoying to have the club number in the Email From line, so we removed it.
9681	<b>Email Notifications Editable at Corp Tier Only.</b> Email notification description no longer editable. Was causing some confusion when edited. Email subject line remains editable.
10808	<b>Add Task Notes to Member Records Notes</b> When you add a note to a member's scheduled task, the note now appears in the note list in the member's record.
11136	<b>Hide/Disable all SMS settings</b> When SMS is not enabled, SMS settings and options are no longer visible.
11342	<b>Active Additional Services Report Filter.</b> You can now filter the report by specific additional services you want to see.
10717	<b>OE tier Dashboard Revenue report total column</b> Revenue Dashboard now has a Total column.
11300	<b>Discount name on receipt.</b> Group Discount name (i.e. Senior discount) now appears next to the Discount on Receipt. Group discounts can be set up at the OE tier FYI. OE Tier → Masters → Group
11393	<b>View Document</b> In the Member Record Documents Tab, any uploaded PDF or JPG file is now viewable by clicking it. Previously the only way to view it was to download and open it.
9460	<b>Add Agreement Type Column to Member's record general tab.</b> When viewing the General Tab of the Member's Record, you will notice a column for agreement type has been added. This helps distinguish punch card and other types of agreements.
11319	<b>Hyperlink member names in CRM.</b> When viewing the various lists available under the CRM button, the member name is now a hyperlink that jumps to the member record when clicked.
11398	<b>Add Payment Method to Tax Report</b> The tax report now lists the payment method for each transaction.
11299	<b>Membership Plan update warning.</b> When updating the price of a Membership plan, the price does not change for all that have been sold. When it is changed now, a warning pops up to remind you.
11215	<b>OE Tier Dashboard - charts embedded</b> The OE Tier dashboard reports for Revenue, New Members and OK members now includes a chart to help you see the trends for your club.



10757	<b>Disable editing Billing Type for Agreements</b> When an agreement is set up as recurring or prepaid, and it has been sold to a member, you cannot edit the agreement to a different billing type. It caused some issues when this occurred. If you want to change billing type, set up a new agreement.
11379	<b>Address field added</b> to New Member by Date Range and Membership Expiration/Termination reports
11181	<b>Extra Statuses for Prospects</b> To help distinguish different levels of prospect interest as they move through your marketing and sales process, a prospect number system has been added.
11317	<b>Add Date of Invoice on Receipt</b> Date of invoice now appears on payment receipt. Previously, when paying multiple invoices, it was difficult to determine dates of prior invoices paid because invoice dates were not included.
11408	Mass Messaging now an option you can restrict in employee security profiles.