# F117: Member Engager Overview

(Covers the documents, notes, and tasks that are part of Fitware's Member Engager functionality.

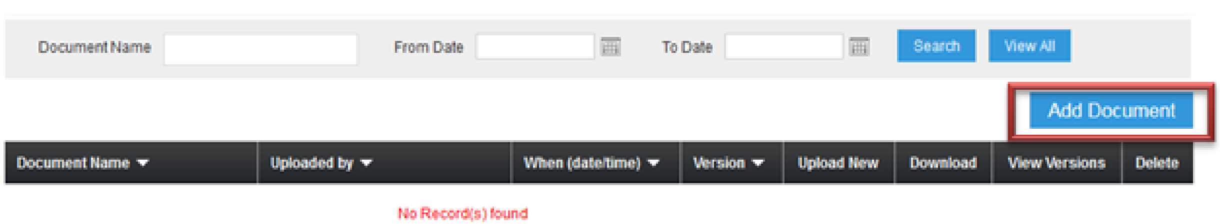
1. Documents
2. Notes
3. Tasks

## Documents

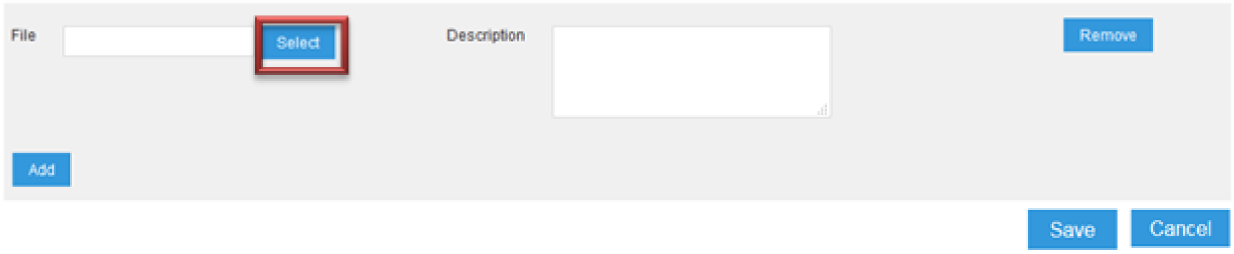
**To add a document to a member, prospect, or employee**:

1. Enter the name in order to go the record of the member, prospect, or employee.
2. Click the **Document** icon in the Relate Bar:

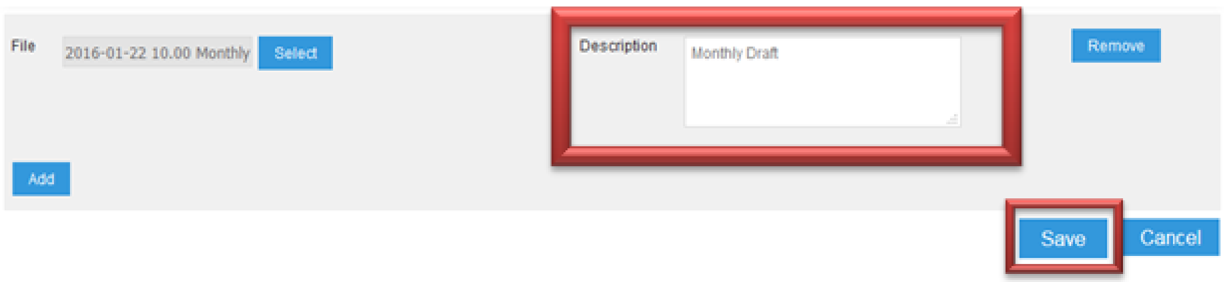
3. Click the **Add Document** button at the far right:



4. Click the **Select** button near the *File* selection option:




5. Browse for and select the file you wish to upload.
6. Enter a description for the file you are uploading, then click the **Save** button:



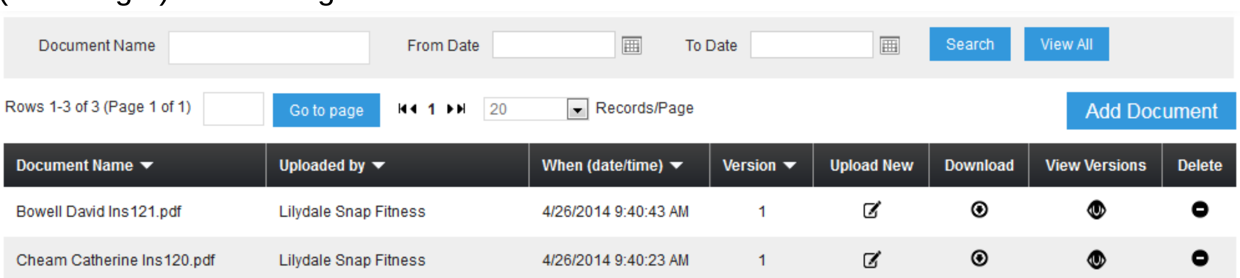

7. The document will appear in the list of uploaded documents for this member:

| Document Name | Related With | Uploaded by | When (date/time) | Version | Download | View Versions |
|---|---|---|---|---|---|---|
| Bowell David Ins121.pdf | Catherine Cheam (Member) | Lilydale Snap Fitness | 4/26/2014 9:40:43 AM | 1 | | |
| Cheam Catherine Ins120.pdf | Catherine Cheam (Member) | Lilydale Snap Fitness | 4/26/2014 9:40:23 AM | 1 | | |

**To download a document, delete a document, or work with document versions**:

1. Click on the members name in order to go the record of the member, prospect, or employee.
2. Click the **Document** icon in the Relate Bar:

3. You will see a list of all documents uploaded for this person, along with options (at the right) for working with each document:

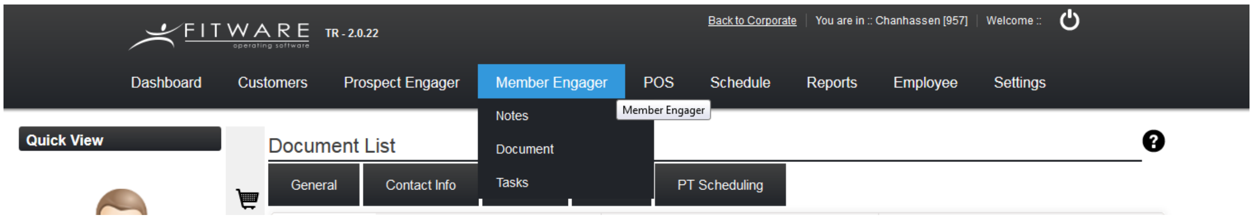



| Document Name | Uploaded by | When (date/time) | Version | Upload New | Download | View Versions | Delete |
|---|---|---|---|---|---|---|---|
| Bowell David Ins121.pdf | Lilydale Snap Fitness | 4/26/2014 9:40:43 AM | 1 | | | | |
| Cheam Catherine Ins120.pdf | Lilydale Snap Fitness | 4/26/2014 9:40:23 AM | 1 | | | | |

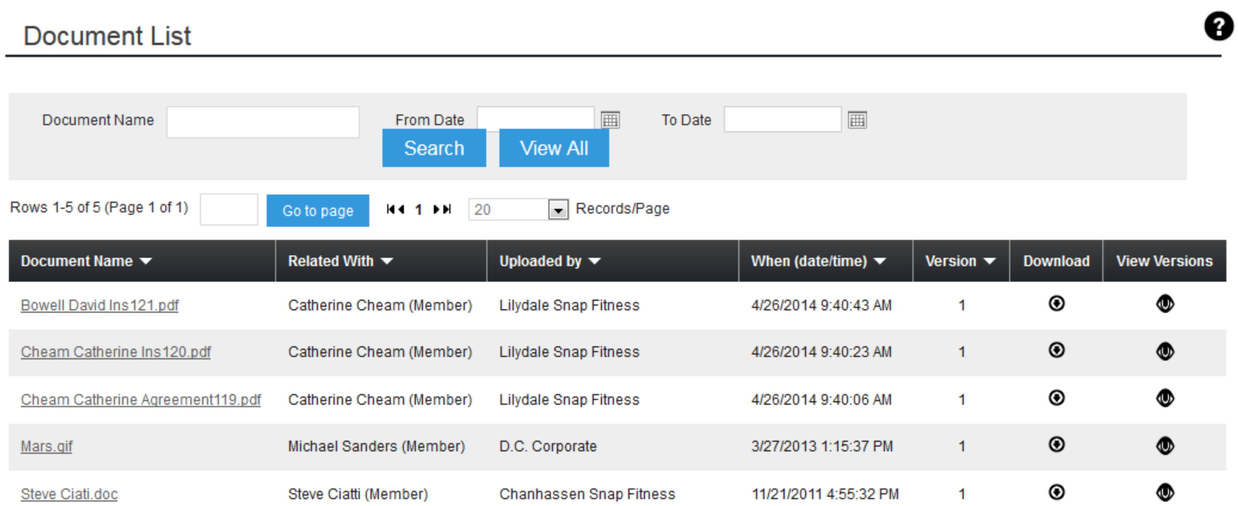
4. The following options are available:
   - **Upload New**: Allows a new (updated) version of the document to be uploaded. Click the icon in the *Upload New* column, and follow the instructions above to upload the new document.
   - **Download**: Allows you to view an uploaded document, or save it to a location of your choice. Click the icon in the *Download* column, and you will be asked if you want to Open or Save the document.
   - **View Versions**: Allows you to see a history of each version of the document uploaded. You may individually view, download, or delete any previous version.
   - **Delete**: Allows you to delete a document. Note: ALL uploaded versions of a document are deleted when you use this feature. To delete only old versions of a document, use the "View Versions" feature explained above.

**To see a list of all uploaded documents**:

1. Click **Member Engager** > **Document**:




2. You will see a list of all documents uploaded for all people:



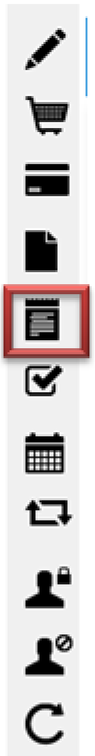

| Document Name | Related With | Uploaded by | When (date/time) | Version | Download | View Versions |
|---|---|---|---|---|---|---|
| Bowell David Ins121.pdf | Catherine Cheam (Member) | Lilydale Snap Fitness | 4/26/2014 9:40:43 AM | 1 | | |
| Cheam Catherine Ins120.pdf | Catherine Cheam (Member) | Lilydale Snap Fitness | 4/26/2014 9:40:23 AM | 1 | | |
| Cheam Catherine Agreement119.pdf | Catherine Cheam (Member) | Lilydale Snap Fitness | 4/26/2014 9:40:06 AM | 1 | | |
| Mars.gif | Michael Sanders (Member) | D.C. Corporate | 3/27/2013 1:15:37 PM | 1 | | |
| Steve Ciati.doc | Steve Ciatti (Member) | Chanhassen Snap Fitness | 11/21/2011 4:55:32 PM | 1 | | |

3. Each document's name is a link. Clicking on that link will take you to the individual document options for that document in that person's record.

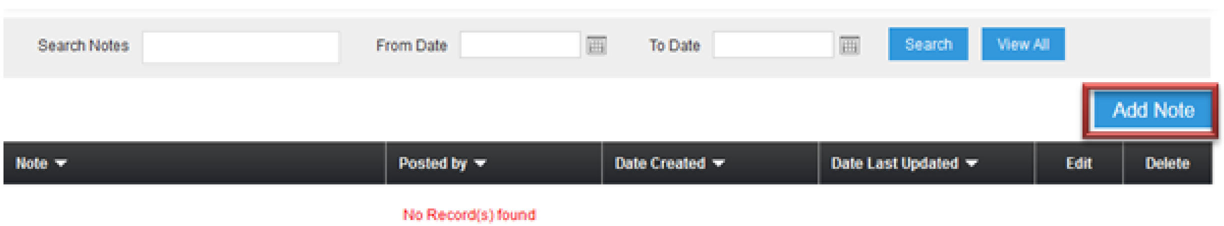
## Notes

**To add a note to a member, prospect, or employee**:

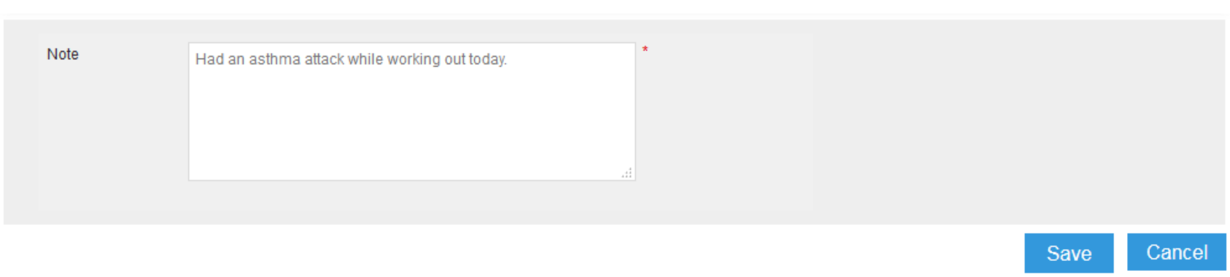
1. Enter the members to go the record of the member, prospect, or employee.
2. Click the **Note** icon in the Relate Bar:



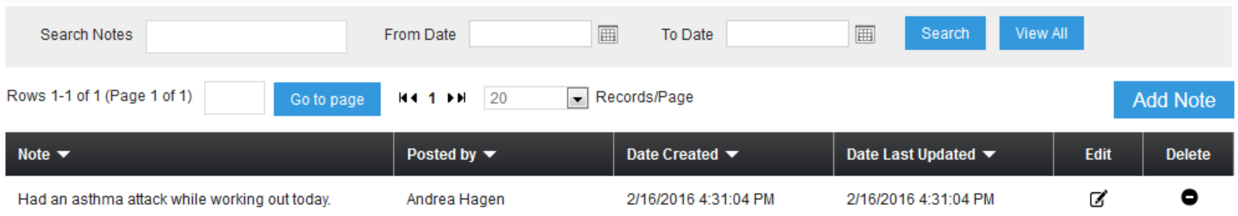
3. Click the **Add Note** button at the far-right part of the screen:




4. Enter your desired note, then click **Save**:

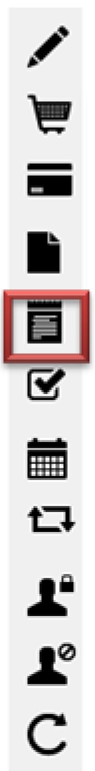



5. The note will be displayed in the person's record along with the date and time it was recorded:

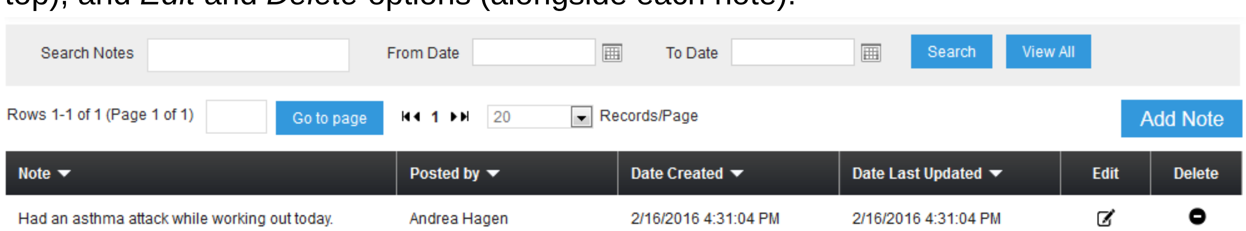



**To view, search, edit, or delete a person's notes**:

1. Enter the name to go to the record of the member, prospect, or employee.
2. Click the **Note** icon in the Relate Bar:

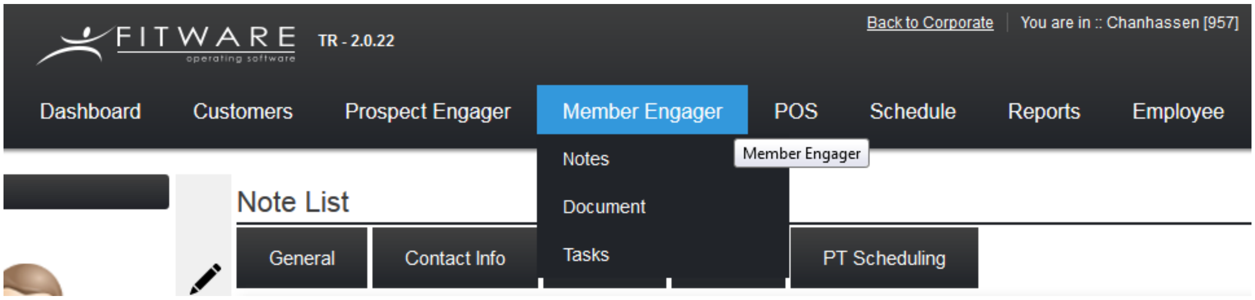


3. You will see a list of all notes for that person, along with search options (at the top), and *Edit* and *Delete* options (alongside each note):

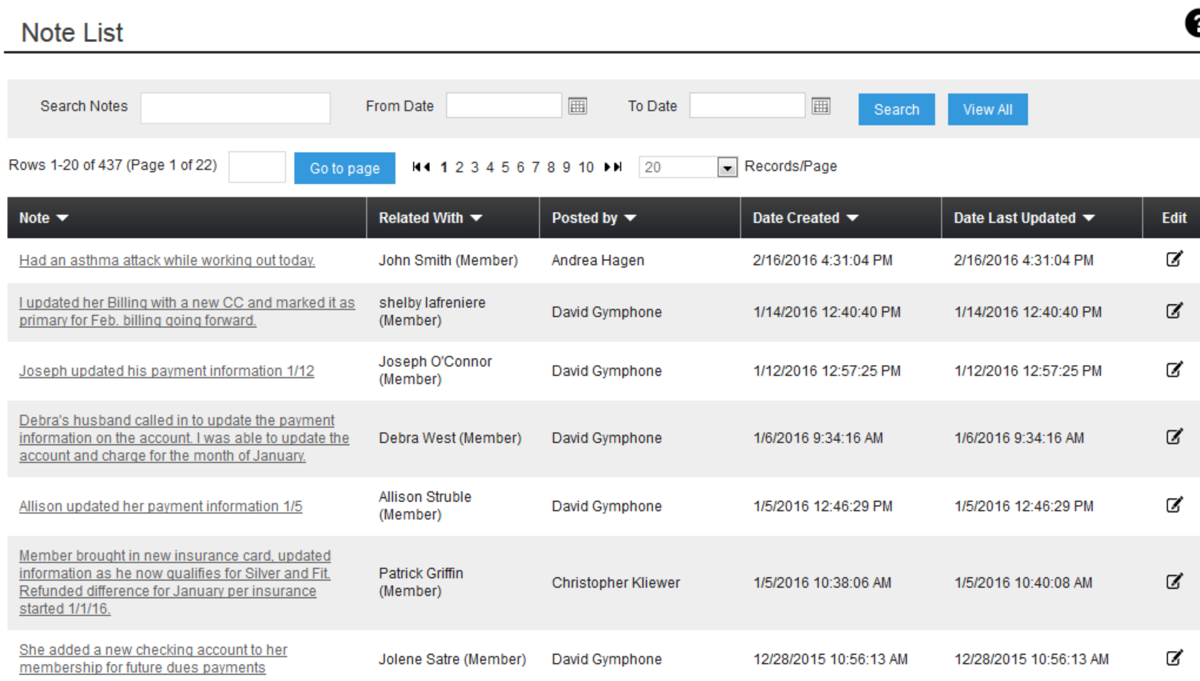


**To see a list of all notes**:

1. Select **Member Engager** > **Notes**:




2. You will see a list of all notes for all people:




| Note | Related With | Posted by | Date Created | Date Last Updated | Edit |
|---|---|---|---|---|---|
| Had an asthma attack while working out today. | John Smith (Member) | Andrea Hagen | 2/16/2016 4:31:04 PM | 2/16/2016 4:31:04 PM | |
| I updated her Billing with a new CC and marked it as primary for Feb. billing going forward. | shelby lafreniere (Member) | David Gymphone | 1/14/2016 12:40:40 PM | 1/14/2016 12:40:40 PM | |
| Joseph updated his payment information 1/12 | Joseph O'Connor (Member) | David Gymphone | 1/12/2016 12:57:25 PM | 1/12/2016 12:57:25 PM | |
| Debra's husband called in to update the payment information on the account. I was able to update the account and charge for the month of January. | Debra West (Member) | David Gymphone | 1/6/2016 9:34:16 AM | 1/6/2016 9:34:16 AM | |
| Allison updated her payment information 1/5 | Allison Struble (Member) | David Gymphone | 1/5/2016 12:46:29 PM | 1/5/2016 12:46:29 PM | |
| Member brought in new insurance card, updated information as he now qualifies for Silver and Fit. Refunded difference for January per insurance started 1/1/16. | Patrick Griffin (Member) | Christopher Kliewer | 1/5/2016 10:38:06 AM | 1/5/2016 10:40:08 AM | |
| She added a new checking account to her membership for future dues payments | Jolene Satre (Member) | David Gymphone | 12/28/2015 10:56:13 AM | 12/28/2015 10:56:13 AM | |

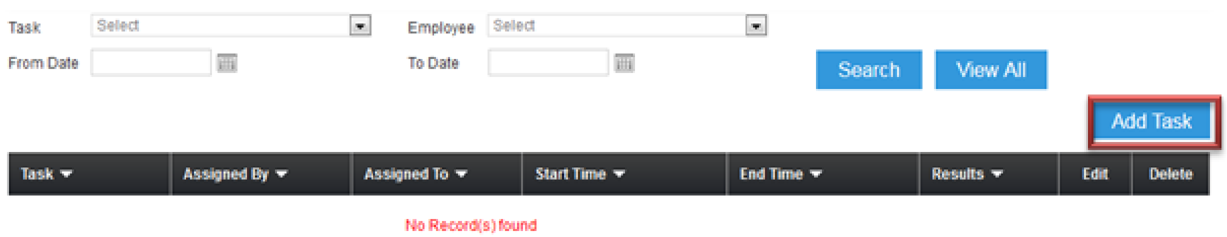
3. Each note is a link. Clicking on the link will take you to that note in that person's record.

## Tasks

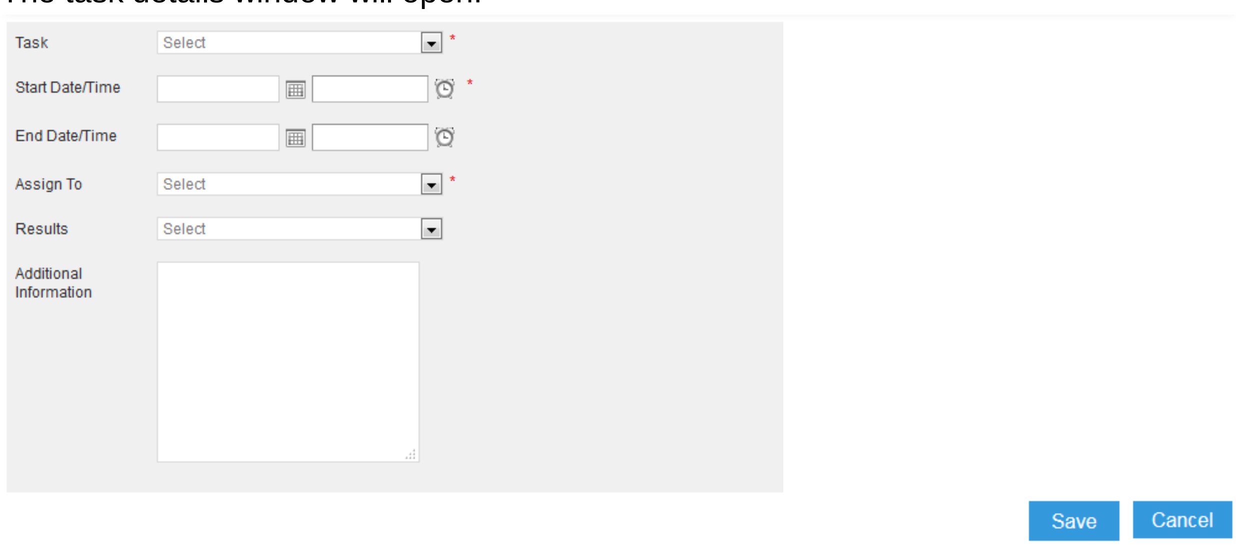
**To assign a task related to a member, prospect, or employee, follow these steps**:

1. Enter the name to go to the record of the member, prospect, or employee.
2. Click the **Task** icon in the Relate Bar:

3. Click the **Add Task** button at the far-right part of the screen:

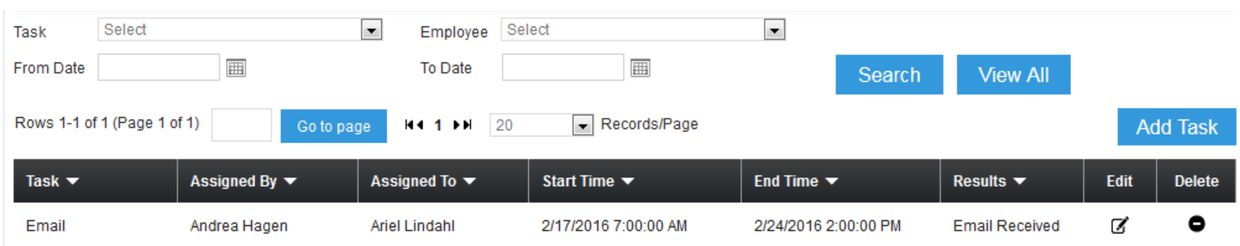



4. The task details window will open:



5. **Task:** Select from the drop-down menu. Task choices include orientation, tour, consultation, incoming or outgoing phone call, and more.
6. **Start Date and Time:** Required.
7. **End Date and Time:** Optional, but could be highly useful (for example, if a member is to be called between 4 and 4:30 p.m.)
8. **Assign To:** Required. The task must be assigned to someone. Use the drop-down menu to make your choice. A task can be assigned to any active employee at the facility.
9. **Result:** Optional. This field is usually completed later, once the result of the task is actually known.
10. **Additional Information:** This is an optional field where you can enter any notes you desire.

Once you enter the information and click **Save**, the task listing will appear:

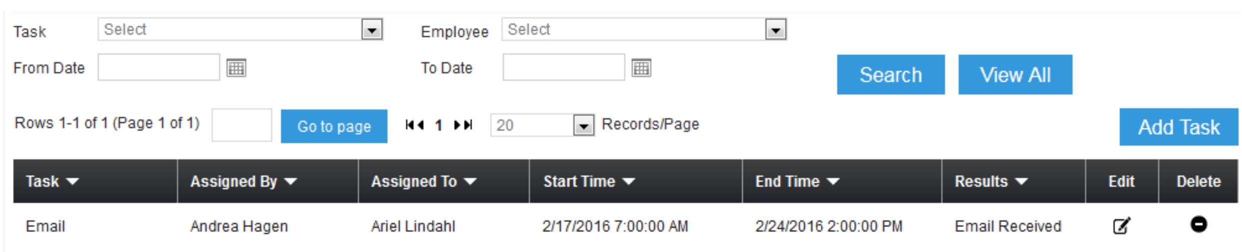



<u>**Note**</u>: It is perfectly okay to assign tasks to yourself. This is a great method of organizing your work and keeping track of what you need to do.

**To view, search, edit, or delete tasks associated with a member, prospect, or employee**:

1. Enter the name in order to go to the record of the member, prospect, or employee.
2. Click the **Task** icon in the Relate Bar:

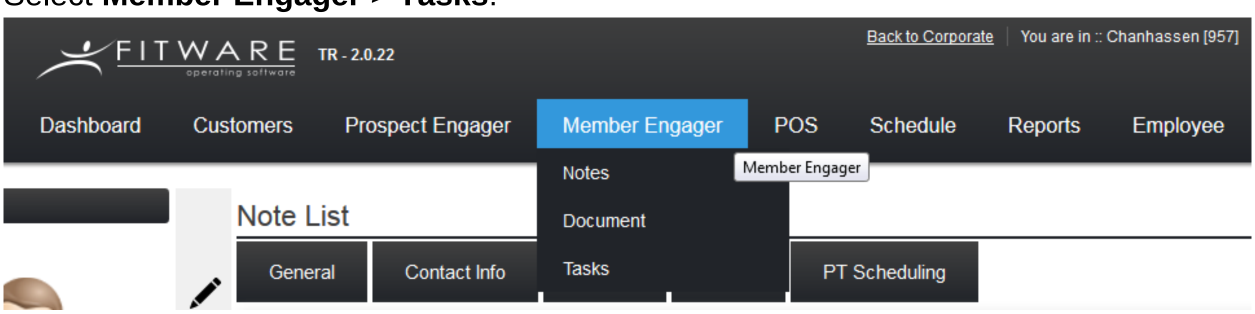
3. You will see tasks related to the selected person:



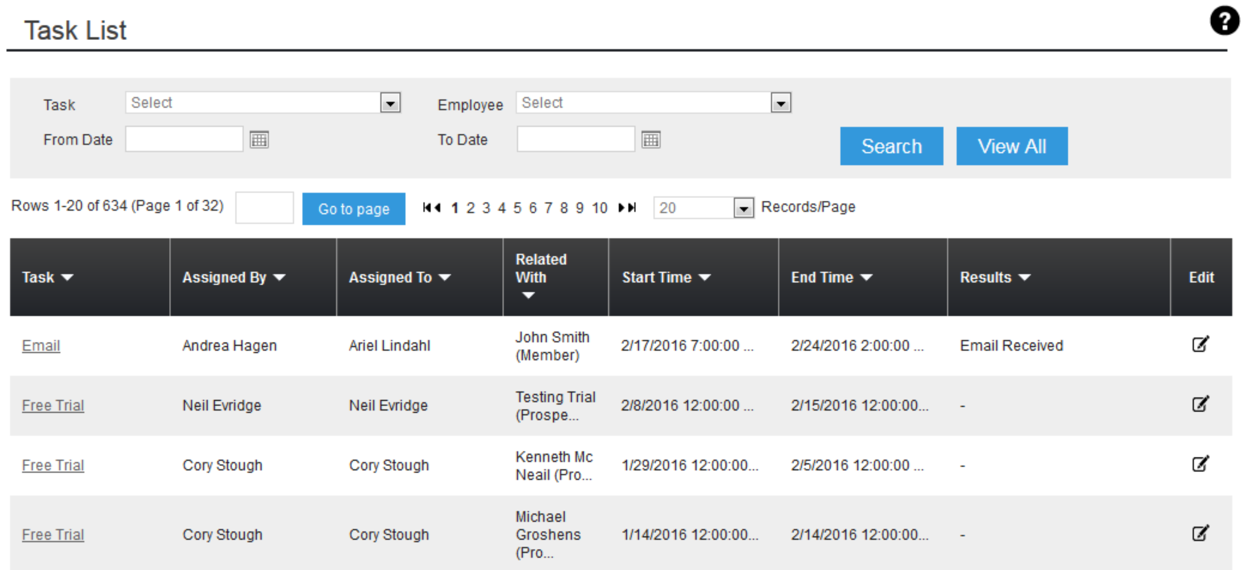

4. Search tools are contained at the top
5. **Edit** and **Delete** functions are provided (at the right-most columns) with each listed task.

**To see a list of all tasks**:

1. Select **Member Engager** > **Tasks**:



2. A list all tasks will display:




| Task | Assigned By | Assigned To | Related With | Start Time | End Time | Results | Edit |
|---|---|---|---|---|---|---|---|
| Email | Andrea Hagen | Ariel Lindahl | John Smith (Member) | 2/17/2016 7:00:00 ... | 2/24/2016 2:00:00 ... | Email Received | |
| Free Trial | Neil Evridge | Neil Evridge | Testing Trial (Prospe... | 2/8/2016 12:00:00 ... | 2/15/2016 12:00:00... | - | |
| Free Trial | Cory Stough | Cory Stough | Kenneth Mc Neail (Pro... | 1/29/2016 12:00:00... | 2/5/2016 12:00:00 ... | - | |
| Free Trial | Cory Stough | Cory Stough | Michael Groshens (Pro... | 1/14/2016 12:00:00... | 2/14/2016 12:00:00... | - | |

3. Each task is a link. Clicking on a link will take you to that task in that person's record.