

The Pulse – Issue 13

August '09

Hello CC'ers!!

Well, we are now into the last month of winter and a month into the second half of the year.....Christmas seems like it is looming just over the horizon!!!! With Spring approaching, people are again beginning to think about their fitness levels and body shapes, so hopefully your studios and gym's will start to see a rise in clientele.

RELEASE NEWS

Version 3 Users

Our cutover to Version 4 is almost complete. There are only a handful of clients left to make the switch so if you are one of those, **please contact us ASAP** so we can get you up to date. We are no longer doing any enhancements to V3.5.

So, **backup** your database first.

Close ClientConnect on ALL machines.

Click on the link below to download the software.

http://www.fitweb.com.au/downloads/ClientConnectSetup_35046.exe

Version 4 users

We have a new release of Version 4, V40043, which has some minor enhancements to Process Billing, SMS's and multiple bookings. We would like to start upgrading you all with this version ASAP.

For those who only have ONE computer, **backup** your database, close ClientConnect and click on the link below. 'Save' the software first and then 'Run' it. Re-open ClientConnect and continue as normal.

For those of you who are networked, **backup** ClientConnect on the Server, close ClientConnect on **ALL** computers (server and workstations), download ClientConnect onto **ALL** computers ('Save' & then 'Run' the executable). Re-open CC on all machines and continue as normal.

http://www.fitweb.com.au/downloads/ClientConnectSetup_40043.exe

Reminders

Many of you still send any support questions to our individual email addresses which can be a problem if we are away for a day or two – urgent enquiries won't get answered. Please remember to **send all emails to support@pulsetecsolutions.com** so **ALL** of us in the support team get them. One of us **WILL** answer you. You can also phone us directly on +61 (0)3 9872 5856.

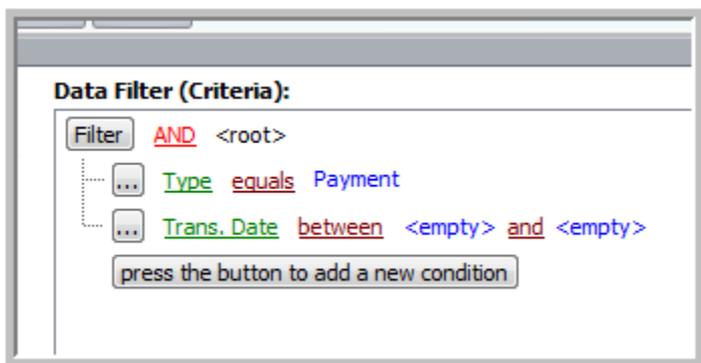
Handy Hint Number 12

Report and Filters.

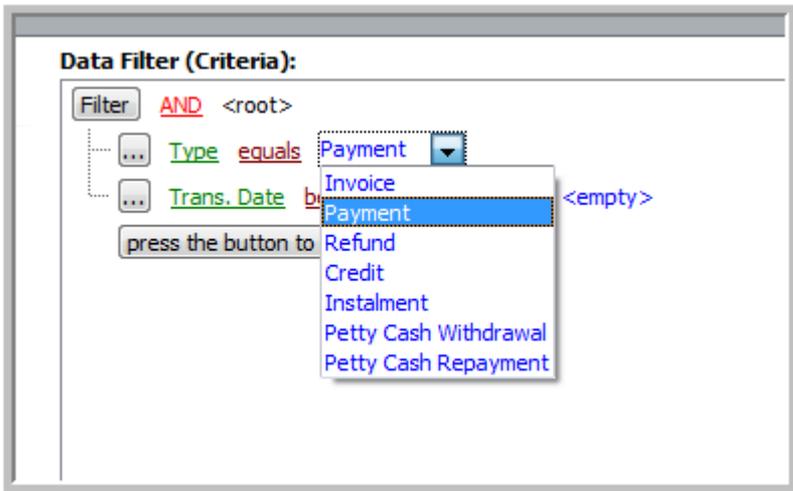
ClientConnect comes with standard reports that cover most areas of the software. You should all have downloaded these reports in your initial setup of the software. If you have not yet downloaded the reports, go to the reports tab and click the lower half of the **'More Reports'** button and then **'Import Sample Reports'**.

Many of the reports have filters on them. This is the selection criteria used to obtain the data needed. These filters, in some cases, can be modified to suit different criteria before you run them yourself. Date ranges, field types etc.

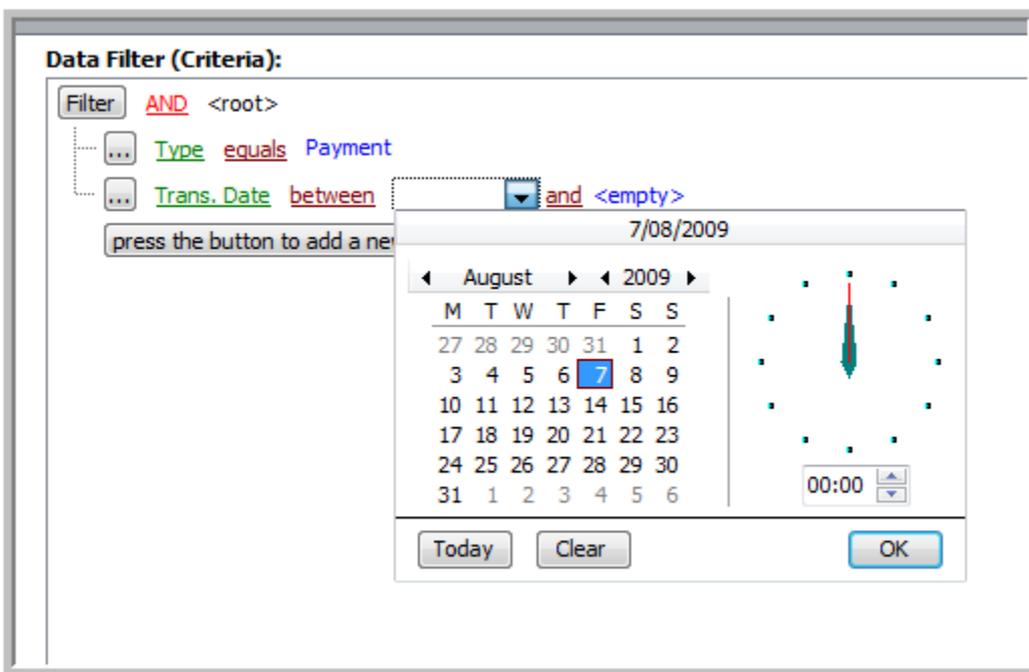
In the example below in the **'Accounts Payments Received'** report, the first filter is **'Type equals Payment'**.



If you click on the **'Payment'** field, you will get a drop down list that gives you all of the different **'Types'** available to select. You can then select what it is you would like to report on.



You can then select the date range that you want the information for.



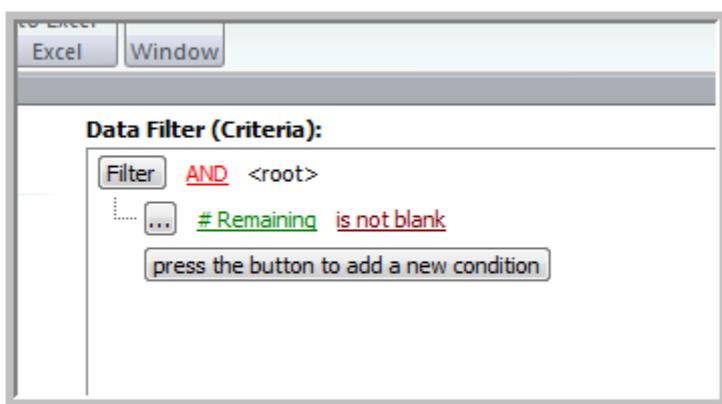
If for some reason you wish to add some extra selection criteria you can do the following.

In the report '**Remaining Sessions per Client**', this is what I see on the database I am using. I see clients with sessions left and clients with 0 sessions left.

SERV3 - Remaining Sessions by Client

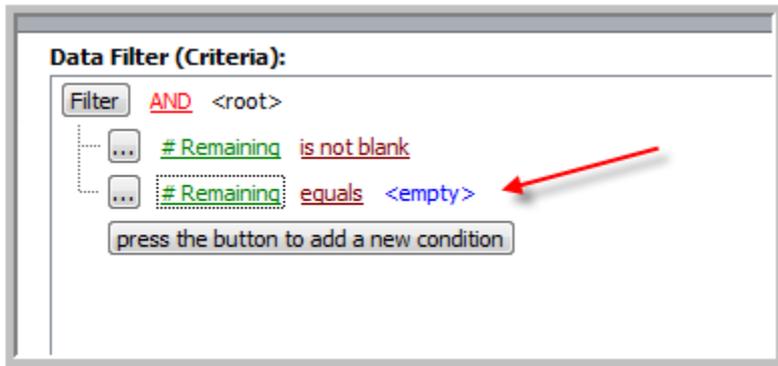
Date Sold	Client Name	Service/Package	Session Count	# Remaining	Item Valu...
Client Name : Ashton, Johnathan (Total Sessions: 4)					
12/06/2008	Ashton, Johnathan	20 PT sessions - 2 per we...	20	2	\$700.00
Client Name : Bear, Fred (Total Sessions: 1)					
7/08/2009	Bear, Fred	PT single session	1	0	\$40.00
Client Name : Bishop, Mardi (Total Sessions: 1)					
18/06/2008	Bishop, Mardi	Make Up Session	1	1	\$0.00
Client Name : Cartright, Carlie (Total Sessions: 5)					
17/06/2008	Cartright, Carlie	20 PT sessions - 2 per we...	20	3	\$800.00
13/06/2008	Cartright, Carlie	PT single session	1	0	\$40.00
Client Name : Collins, Jason (Total Sessions: 1)					
12/06/2008	Collins, Jason	Group Training 1 session ...	1	1	\$15.00
Client Name : Day, Annette (Total Sessions: 22)					
7/08/2009	Day, Annette	Group Training - 10 sessi...	10	10	\$150.00
17/06/2008	Day, Annette	10 PT sessions - 1 per we...	10	10	\$400.00
13/06/2008	Day, Annette	Massage 1 hour	1	0	\$60.00
13/06/2008	Day, Annette	PT single session	1	0	\$40.00
Client Name : Elliott, Lynnne (Total Sessions: 12)					
13/06/2008	Elliott, Lynnne	Group Training - 10 sessi...	10	9	\$150.00

This is because the filter says 'is not blank'.

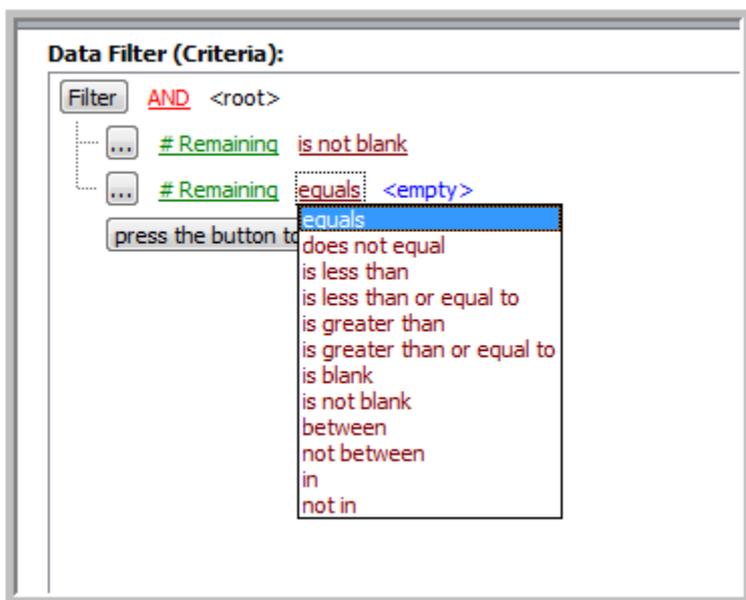


If for some reason, you don't want to see clients with 0 balances, but only those with sessions left to use, then you can **ADD** a new filter.

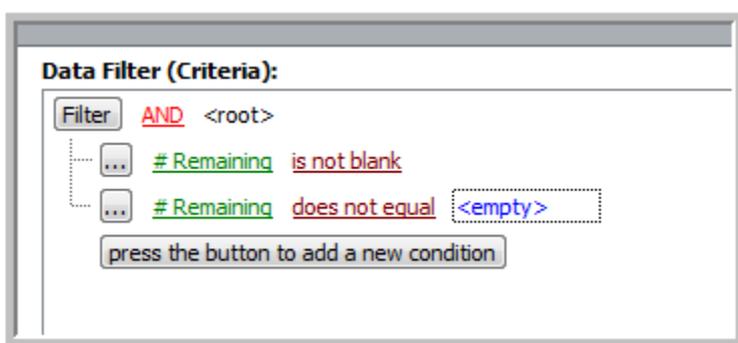
Click on 'Press the button to add a new condition'. This will create a new filter for you to change as you wish.



If you then click on 'equals', you will get a drop down list of options to choose from.



Now select what you need. In this case, we want to exclude any zeroes, so select 'does not equal'.



Now you simply need to put 0 into the '<empty>' field.

Data Filter (Criteria):

Filter **AND** <root>

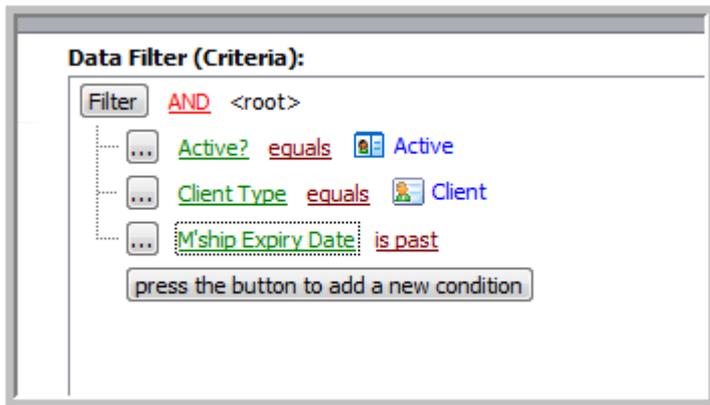
- ... # Remaining is not blank
- ... # Remaining does not equal

What now appears in my report is below. No clients with 0 sessions left are listed anymore.

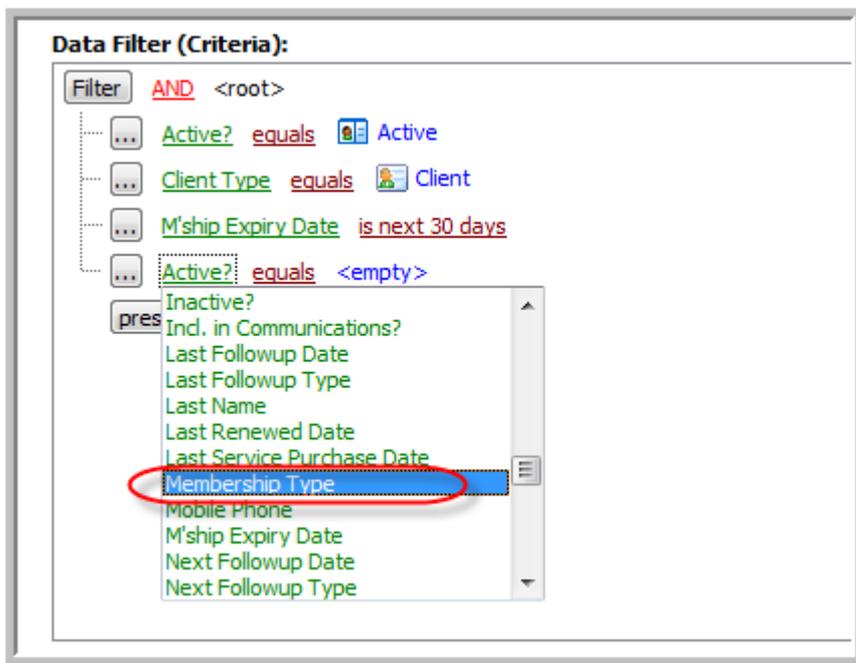
Date Sold	Client Name	Service/Package	Session Count	# Remaining	Item Valu...
Client Name : Ashton, Johnathan (Total Sessions: 4)					
12/06/2008	Ashton, Johnathan	20 PT sessions - 2 per we...	20	2	\$700.00
Client Name : Bishop, Mardi (Total Sessions: 1)					
18/06/2008	Bishop, Mardi	Make Up Session	1	1	\$0.00
Client Name : Cartright, Carlie (Total Sessions: 4)					
17/06/2008	Cartright, Carlie	20 PT sessions - 2 per we...	20	3	\$800.00
Client Name : Collins, Jason (Total Sessions: 1)					
12/06/2008	Collins, Jason	Group Training 1 session ...	1	1	\$15.00
Client Name : Day, Annette (Total Sessions: 20)					
7/08/2009	Day, Annette	Group Training - 10 sessi...	10	10	\$150.00
17/06/2008	Day, Annette	10 PT sessions - 1 per we...	10	10	\$400.00
Client Name : Elliott, Lynnne (Total Sessions: 12)					
13/06/2008	Elliott, Lynnne	Group Training - 10 sessi...	10	9	\$150.00
17/06/2008	Elliott, Lynnne	Fitness Assessment	1	1	\$45.00
12/06/2008	Elliott, Lynnne	Massage 1 hour	1	1	\$60.00
Client Name : Jones, Emily (Total Sessions: 10)					

With the filters, you can also change/add what fields are being used.

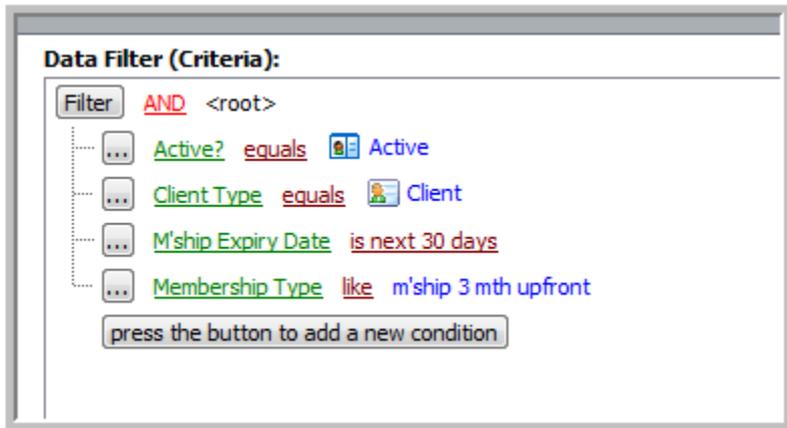
In the report below, 'Clients due to renew – next 30 days', it will list all membership types. What if I want to only know about specific membership types?



I would add a new filter. It will list the first field in the drop down list so we need to find the field we are after. In this case it is 'Membership Type'.



'like' will automatically be entered in because of the field type. You then need to type in the name of the membership.



I will now only have 'm'ship 3 mth upfront' membership types that are due to expire in the next 30 days listed in my report instead of ALL membership types.

So, you can alter your reports on an ad hoc basis. Those changes will not be saved for next time you use them though. So, if there are specific changes that you need made to a report on a permanent basis, just let us know.

FAQ number 10

Q. Can I split payments?

A. Yes, you can split payments for any upfront payment (not recurring ones). From the transaction screen when you are selling a package/membership, click on 'Split Payments'. You then need to specify how much you want each instalment to be and how often each instalment will be made.