The Pulse – Issue 15   October '09

Hello CC'ers!!

The weather is definitely improving and daylight savings has added that fantastic extra 'after hours' time to our day. I have used it to finish cleaning my gutters...YUK!!!! The World Masters Games are on in Sydney from the 10th – 18th of October and some of you may be competing. I am - hockey! I'll let you know how we go in the next newsletter!

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 14

Cancelling Memberships.

There are two ways of cancelling a membership, whether it is an open ended one or a termed one. But it also depends on whether they have a package as well as the membership.

Access Method

Option 1a – use this option if a client **ONLY** has a membership (no package).

1. The below client's membership does not expire until 18/11/09 but we want to expire them now as they are heading overseas to live.
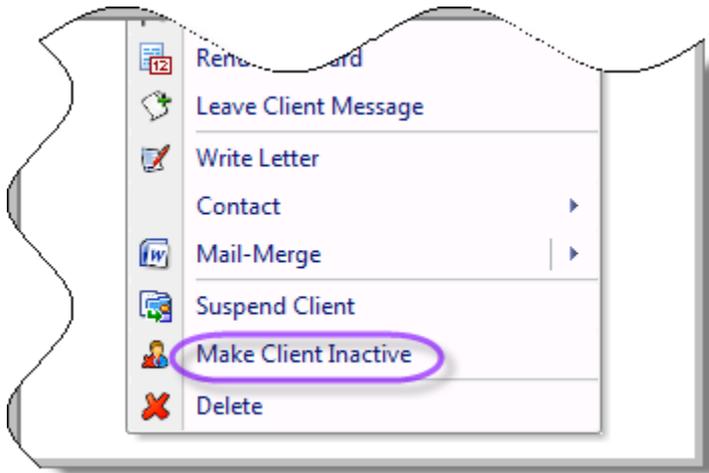
Oct fig 1

|						
❤	Client	Deb	Galtry		bill	m'ship 3 mth … 2/12/2009
❤	Client	Kim	Cousins		bill	m'ship 3 mth i… 18/11/2009
❤	Client	Chrissie	Deman		bill	m'ship 3 mth i… 7/10/2009
❤	Client	Sonia	Parker		netball	m'ship 3 mth … 11/09/2008
❤	Client	fred	bear			monthly recurr

2. Do a **right** click on that client.

3. In the drop down menu that appears, select **'Make Client Inactive'**.

Oct fig 2

4. Enter the reason for making them inactive and a date. If you future date it, they will not become inactive until that date and will continue on as normal. Click 'OK'.

Oct fig 3
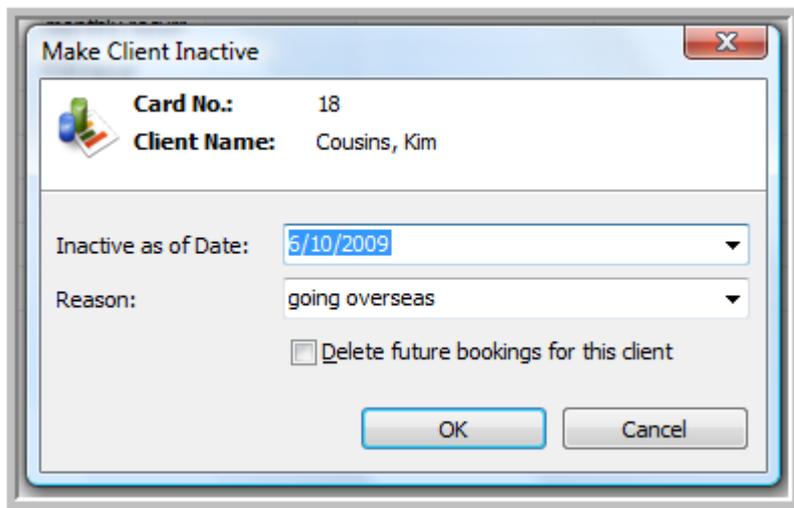
5. The client is now greyed out indicating it is inactive. (We add a corollary to this as depending what version you are on, this may or may not be the case – our soon to be released version DOES show this).

Oct fig 5

6. If you double click on the client to open up their details, you will see that they are now inactive.

Oct fig 4

Option 1b – if the client has a membership only, you can use this option or the above option. If they have a membership **AND** a package, use the following option.

1. Double click on the client and open up their details and go to the 'Membership' tab. Click on 'Client Membership Details' and put in your password to access the information.
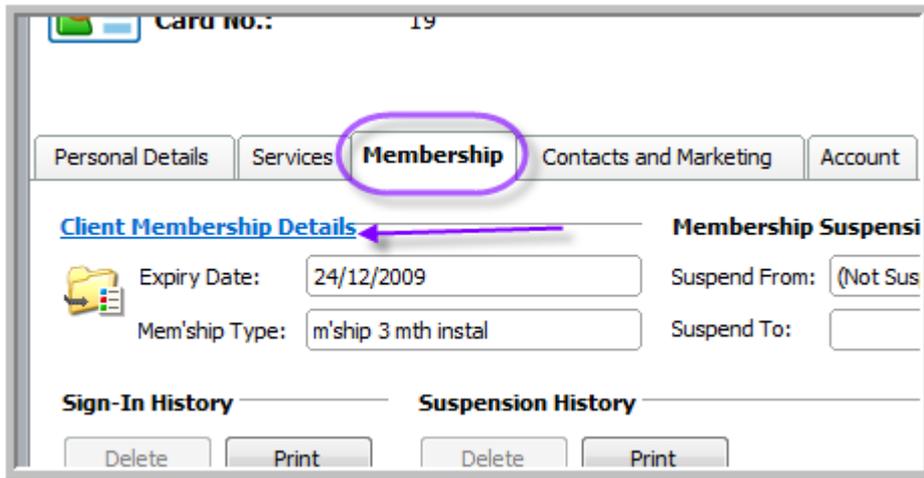
2. The client I am looking at has a termed membership (therefore an expiry date). The following applies for open ended memberships as well.
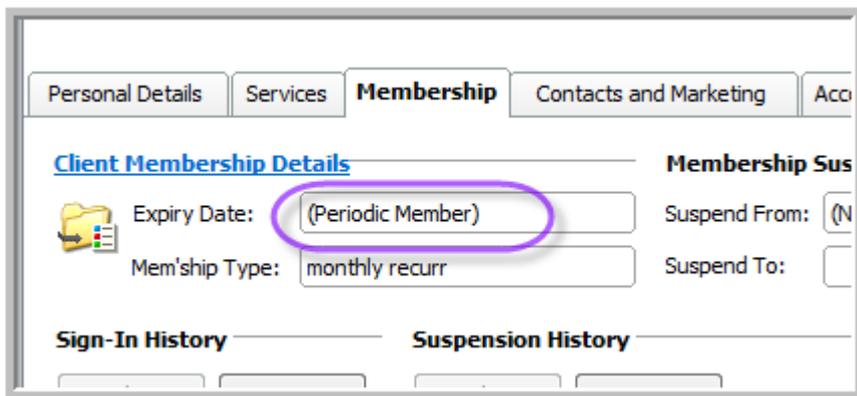
Click on the 'Expiry Date' to get the calendar up and then choose the new expiry date.
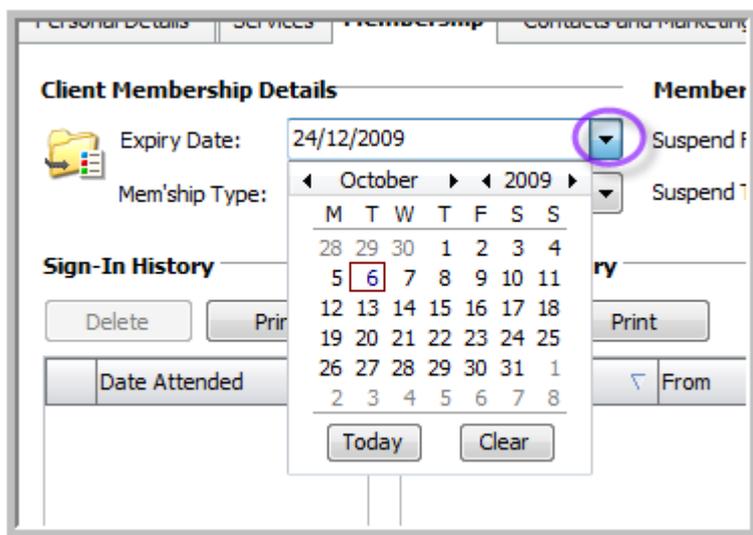
3. This will expire the membership without making the client inactive. If they also have a valid package, they will not be greyed out on the Clients & Enquiries Screen.
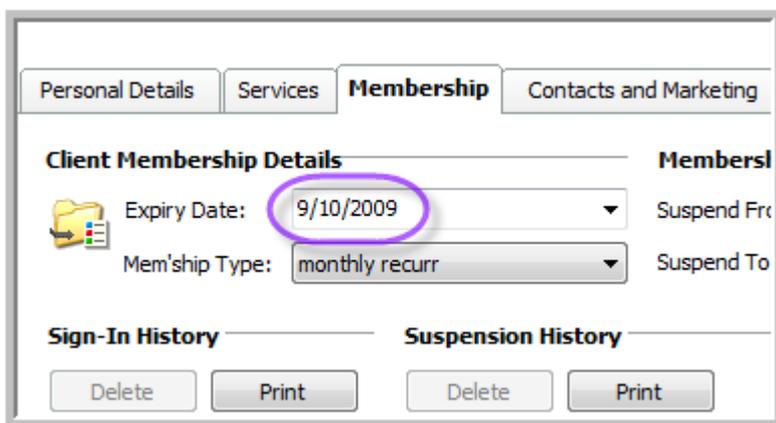
NB   We recently had some clients with OPEN ENDED memberships.....

Oct fig 8

and they put in an expiry date.......

Oct fig 9

What this does (and it ONLY applies to open ended memberships) is tell CC to no longer create invoices for those memberships.

If you then take out the expiry date, CC resumes its invoice creation but only from now forward. It will not create the ones that were missed.

FAQ number 10

Q.   What other support is available?

A.   We are adding to our support website all the time and have just added all previous newsletters to it. You can access it directly via the following link http://support.pulsetecsolutions.com or go to our website www.pulsetecsolutions.com and access it via *Customer Care > ClientConnect PT Edition*

A useful way to find help on a specific topic is to use the **Search** tab and enter.

Oct fig 10

Oct fig 11

RELEASE NEWS

Version 3 Users

Please contact us ASAP so we can move you across to Version 4 as we are no longer doing any enhancements to V3.5. Please upgrade to our last version of 3.5 as a pre-requisite to going to V4.

BACKUP your database first.
Close ClientConnect on ALL machines.
Click on the link below to download the software on ALL machines.

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

Then please CONTACT us.

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' and install 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 ('Sav e' & then 'Run' and install the executable). Re-open CC on all machines and continue as normal.

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