

The Pulse – Issue 19

February '10

Hello CC'ers!!

Woo hoo!! The kids are back at school and the daily routine begins again. Actually I never quite know whether I like holiday time better than term time. I think holidays win by a small margin.

Reminders

Please continue to send any correspondence to support@pulsetecsolutions.com not to our personal emails because if we are away, you may not be answered and we don't want that to happen. You can also phone us directly on +61 (0)3 9872 5856.

Training

For those of you who have Customer Care/Support and those on monthly licensing, extra training is available at the discounted rate of \$75/hr inc GST. You might want to train up new staff or take advantage of some of the features in ClientConnect that you are not using. Training would be via phone and internet (Glance – ability to see/control the clients screen).

Handy Hint Number 18

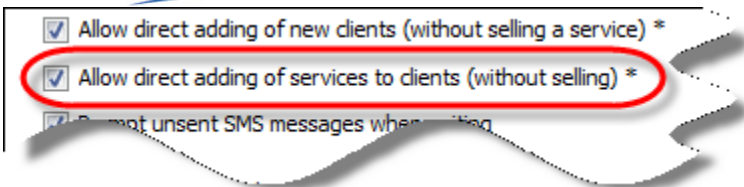
The below hint is new to Version 4.1 so if you are still on V3.5, you really need to contact us ASAP for information on migrating your data across to V4.1. If you are on V4 already, just call us for a link to V4.1.

Direct Adding of a Service

You can now directly add a service to a client without actually having to sell it to them. For example, you may, as part of your membership, give that client 2 free personal training sessions. So you would sell them the membership as normal and then simply directly add the 2 PT sessions – this means there is no account information for the PT services.

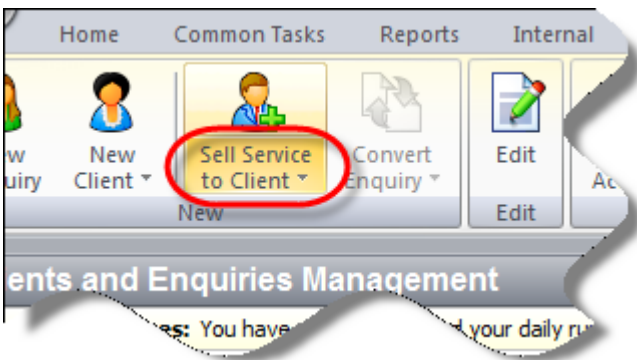
Step 1 Go to 'Application Menu' > 'Control Panel' > 'ClientConnect Options' > 'General Settings' and scroll to the bottom. There is a new option, 'Allow direct adding of services to clients (without selling)*' so tick this. As this option has an asterisk against it, you need to close and reopen CC for it to take effect.

Feb fig 1



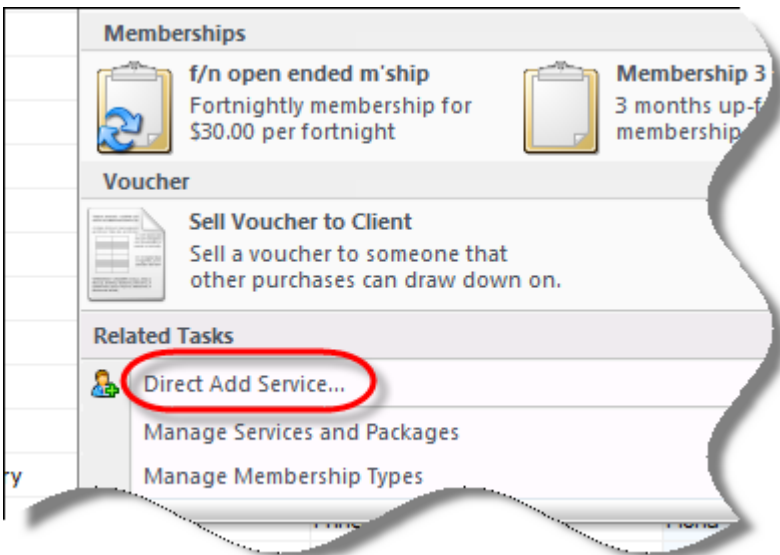
Step 2 Go to **Clients & Enquiries** and click on the bottom half of the **'Sell Service to Client'** button.

Feb fig 2



Step 3 At the bottom of the drop down menu, there is the option to **'Direct Add Service...'**

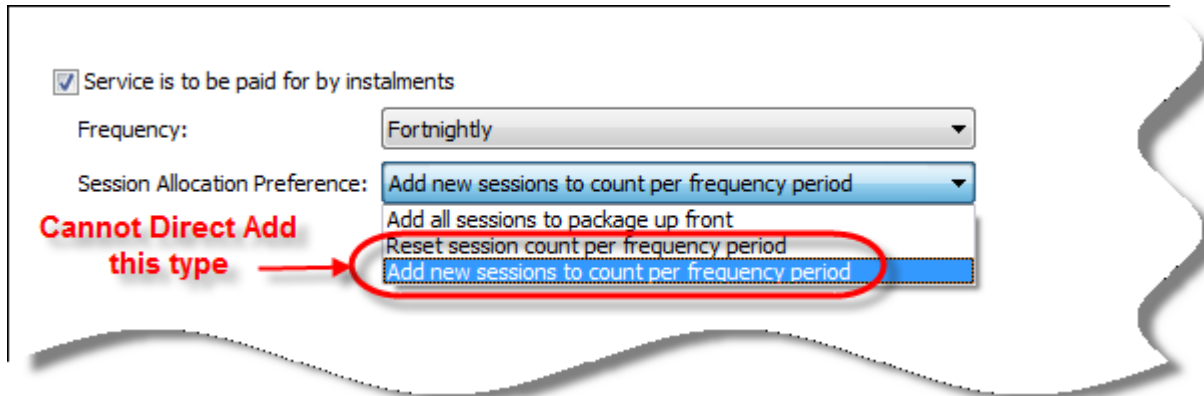
Feb fig 3



Step 4 Click on it and then choose which service/package you are adding to the client.

NB. If you have packages which are set up to reset or add sessions on a weekly/f'nightly/monthly basis, that service won't be available to directly add. Only packs where sessions are added upfront are available to use.

Feb fig 4

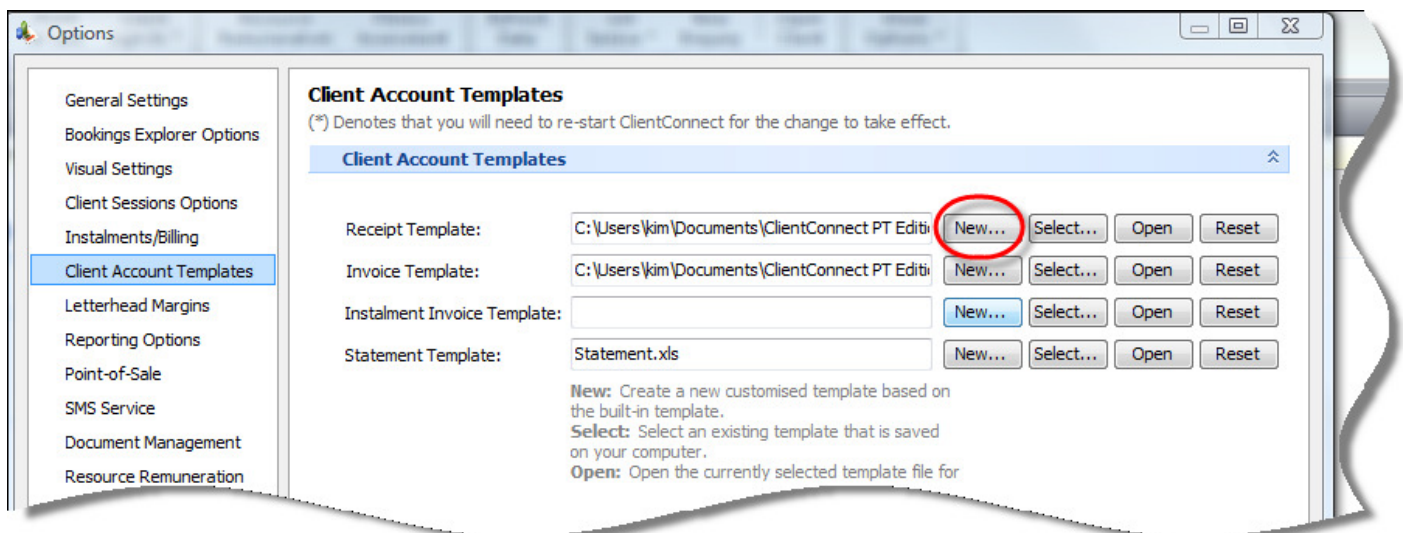


Customising receipt/invoice templates

Lately we have had requests from clients who wish to add logos or extra information to their receipt and invoice templates. This you can do.

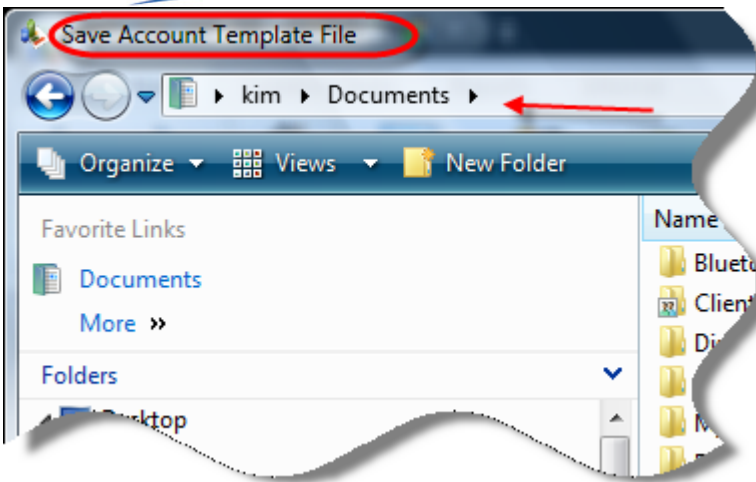
Step 1 Go to 'Application menu' > 'Control panel' > 'ClientConnect Options' > 'Client Account Templates'. Click on 'New' for the template you wish to modify.

Feb fig 5



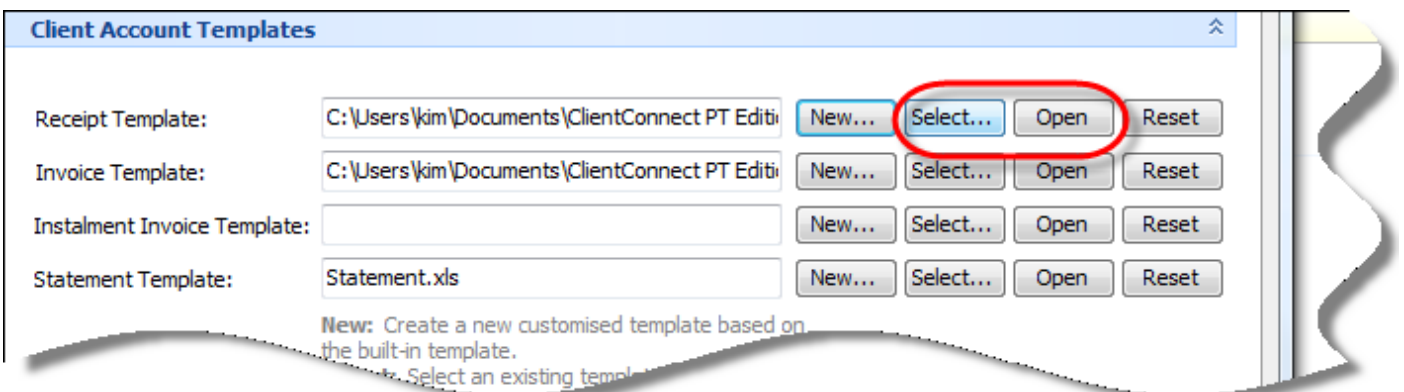
Step 2 A screen will appear for you to browse to where you would like to save the template. Select a file path and save the template.

Feb fig 6



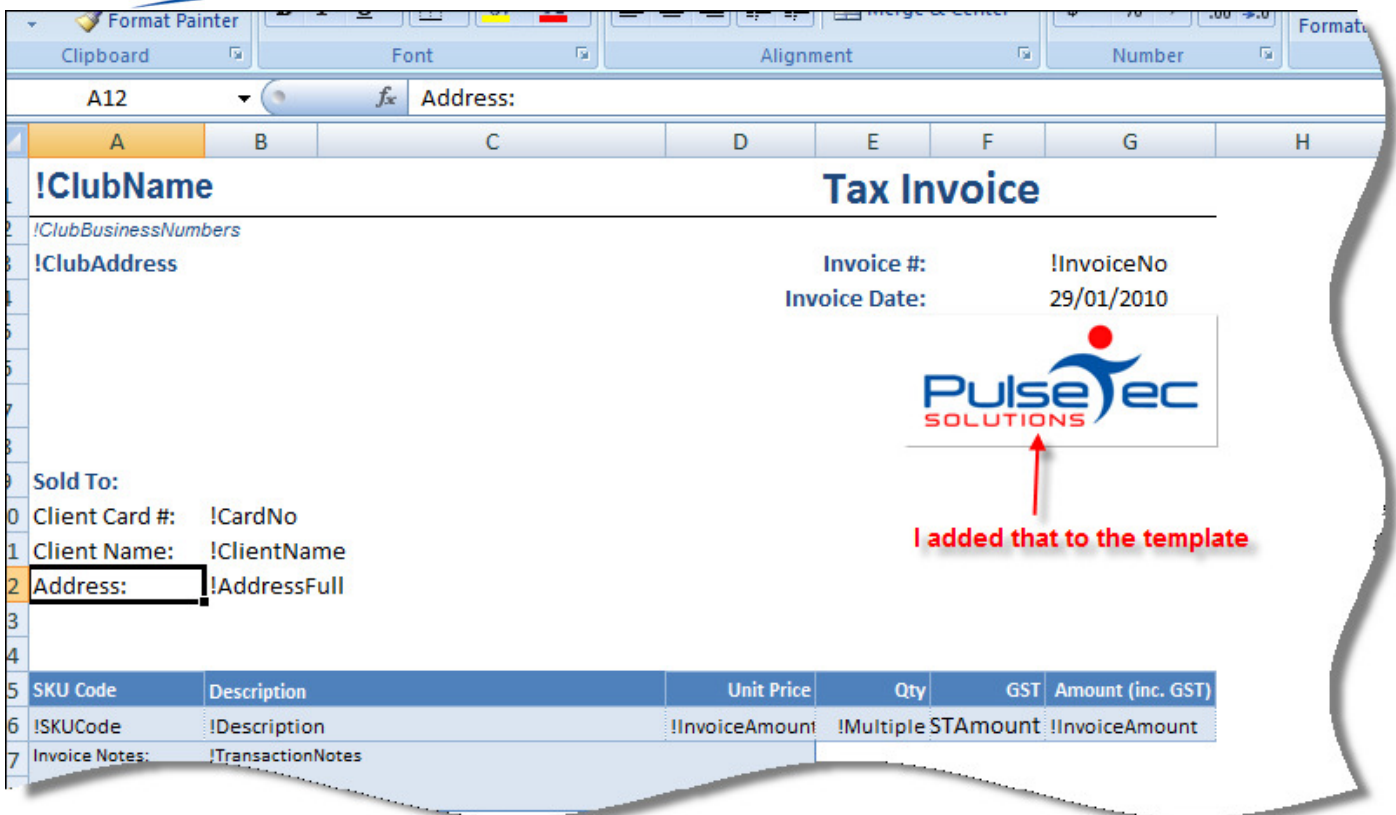
Step 3 You can then click on 'Select' and browse to your newly created template. Then click on 'Open'. It has been created in Excel.

Feb fig 7



Step 4 I added a logo to my template.

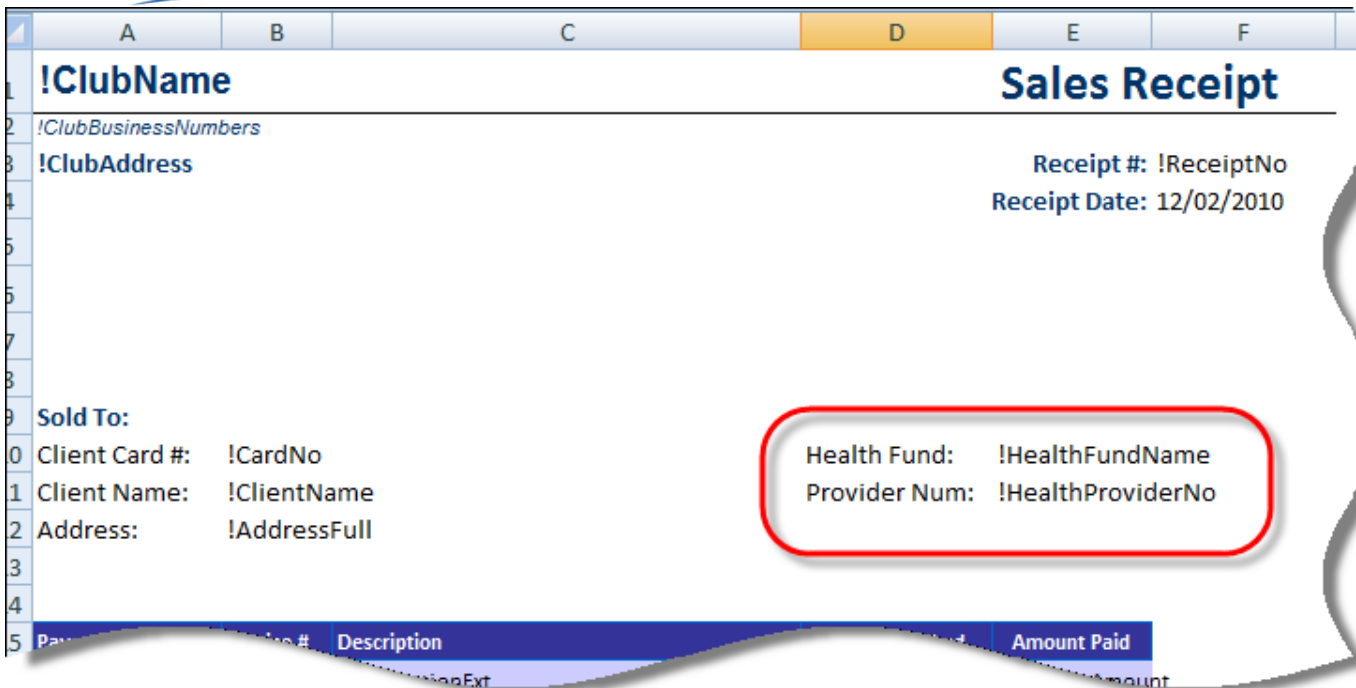
Feb fig 8



Step 5 I can add other fields to the template too. For example if I want the Health Fund they are in and the Provider number on the receipt, I can add that in.

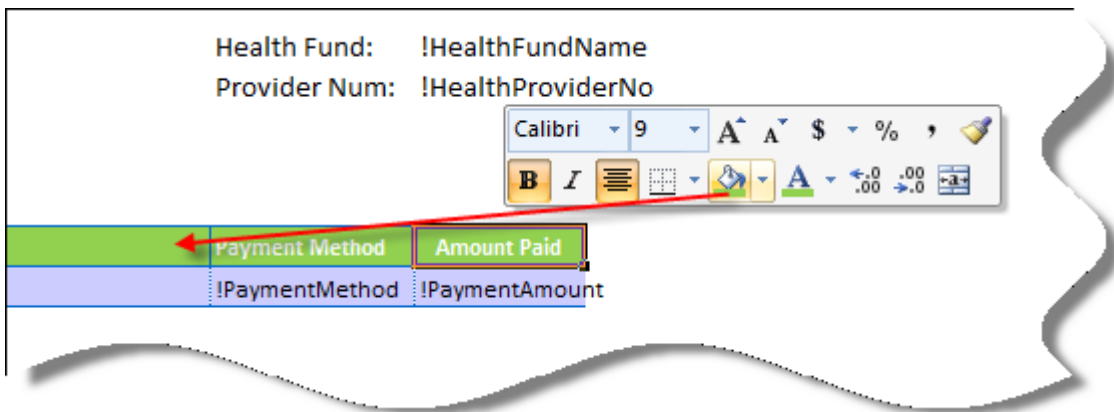
NB: if you want to add fields you will need to let us know which ones so we can give you the actual database name field name. All database fields in the templates are the one with an ! mark in front of them.

Feb fig 9



Step 6 You can also change the colors in the receipt (if you have a color printer).

Feb fig 10



Step 7 Simply save the template when you have finished with modifying it.

Step 8 Test out your new look template by printing of a receipt/invoice.

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 this is a pre-requisite to going to V4.1.



Club and PT Management Software

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

Please contact us for the information regarding the download of our new release, V4.1.