The Pulse – Issue 4   October '08

Hello CC'ers!!

Well, it's finally here!!! Daylight Savings!! For those of you that do outside training, I guess the late nights are about to begin. With warmer weather on the way and people thinking about skimpier clothing, business should be hotting up for all. So, some more tips and hints that will help you get the most out of ClientConnect giving you the time to get the most out of your clients.

We hope you all got some good information out of last month's edition and are now making the most out of field chooser.

Again, 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 4

Mail Merge.

The **'Mail Merge'** allows you to send bulk emails to your clients. You can send an email to ALL of your clients or you can send to a selective list (which can be created using the field chooser, from last month's newsletter). It is a handy feature if you want to let your clients know about a special you have going or maybe inform them you will be away for a particular week or a change in your timetable.

Access Method

Firstly, go into your **'Clients & Enquiries'** screen.

From here, you want to create your list of clients. If you want to send an email to everyone, then that's easy as all clients are already listed in that screen**.**   If you want to send to only those who have a 3 month membership telling them about a special if they upgrade to 12 months, then use the **'Field Chooser'** to create that list. Once you have your list, click on the heading **'E-mail Address'** and select **'NonBlanks'.** This will give you only those clients whom you have email addresses for.

Now that you have your final list, click on **'Mail Merge'**.

You will then be presented with the choice of a merge to Word or SMS. We will look at a merge to Word so click on that and you will be presented with this screen.
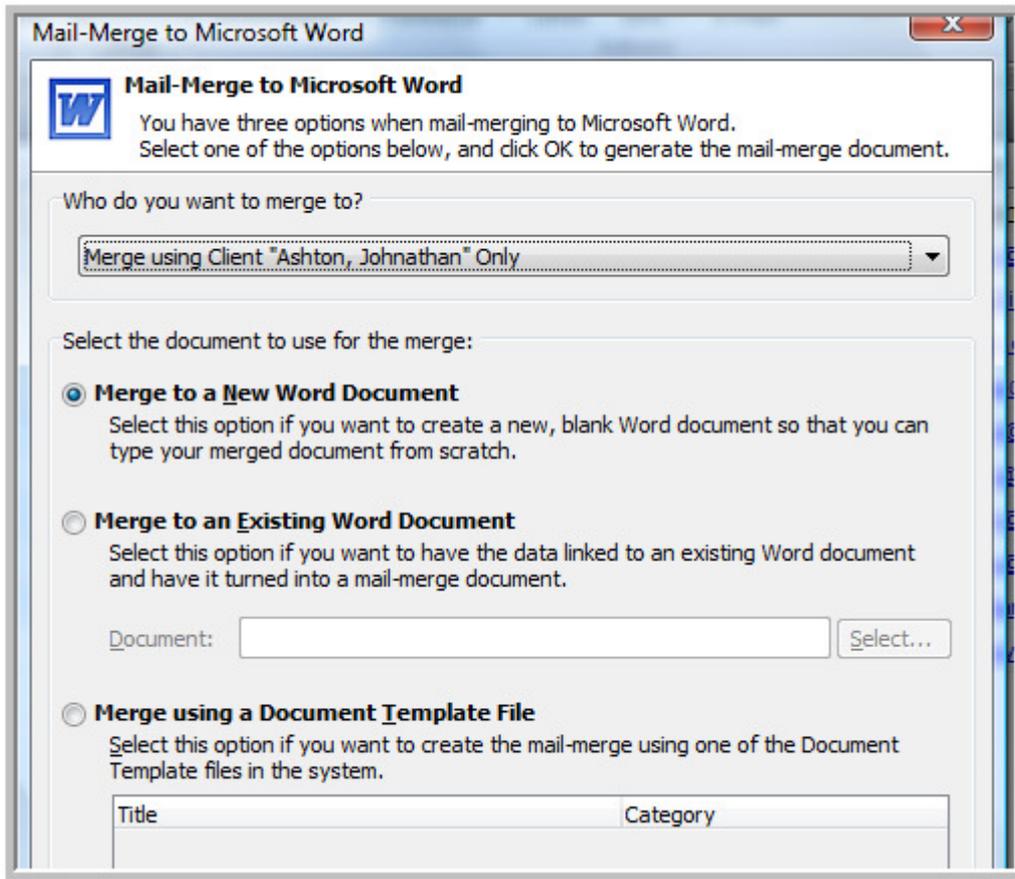
Select who you would like to merge to. We are going to **'Merge using all clients in current view'** and **'Merge to a new document'**.
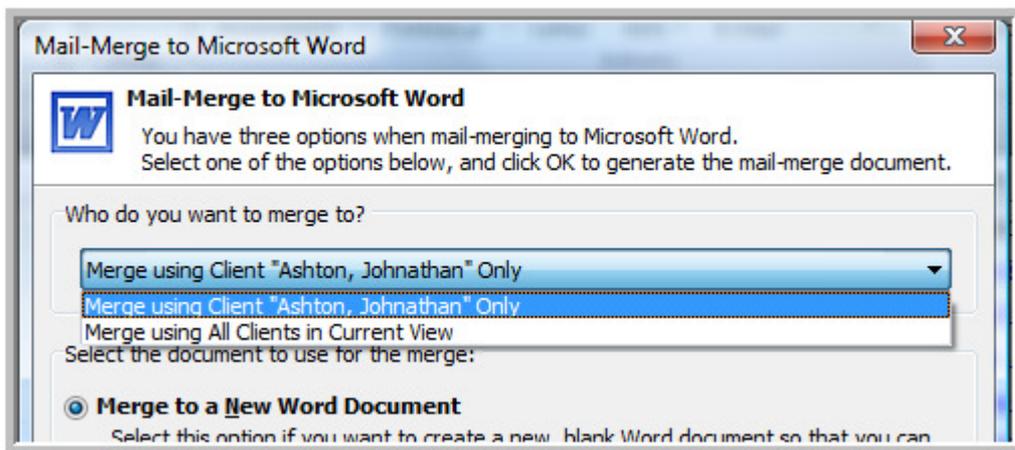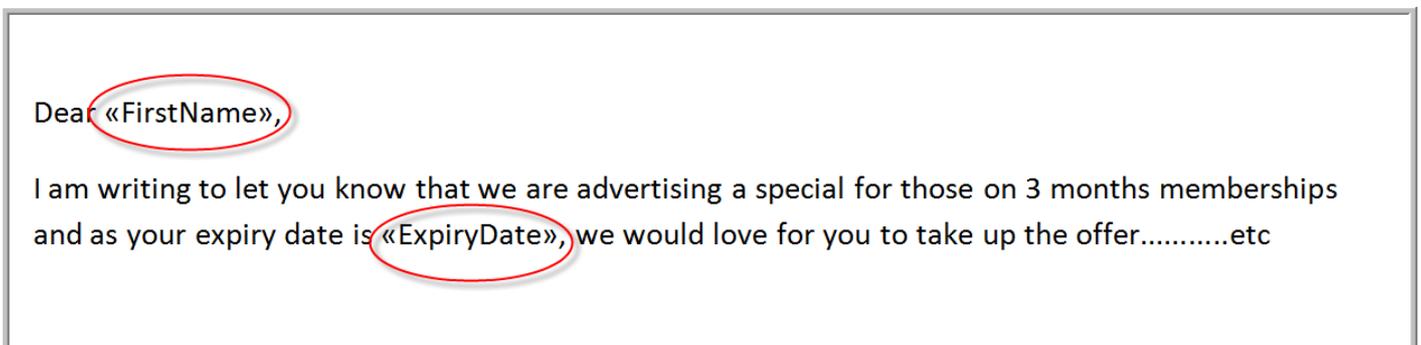

You will see the new document flashing orange at the bottom of your screen so click on it to select it. This is what you will see.
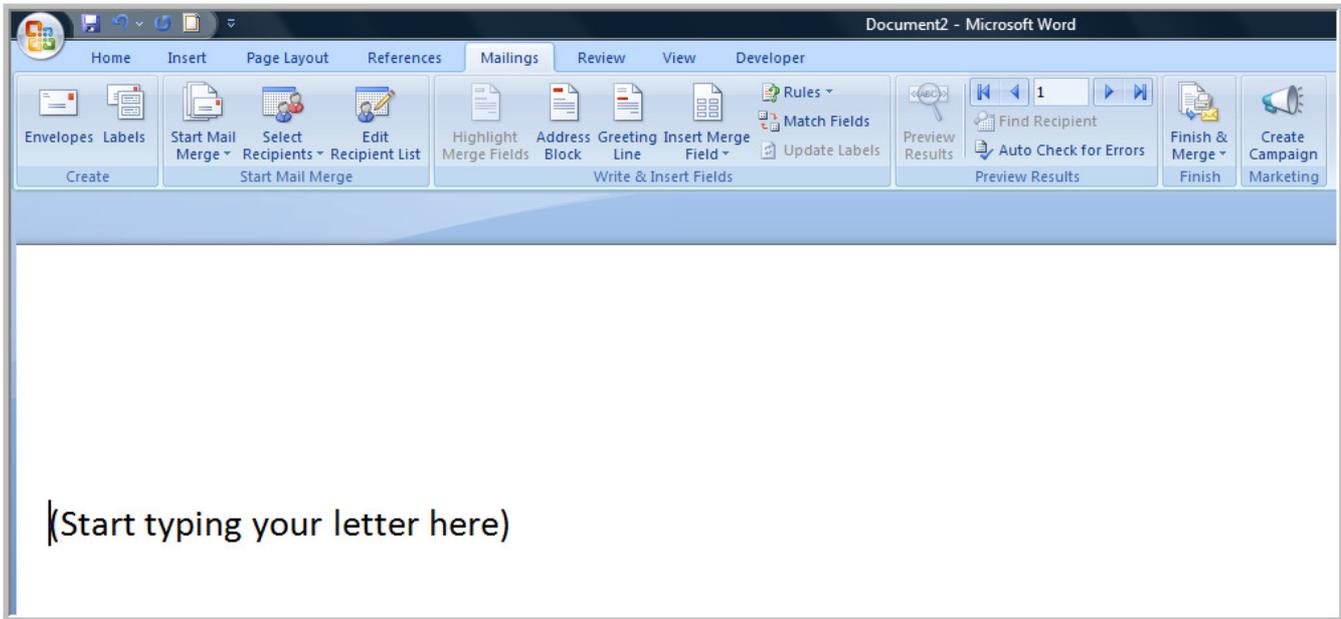
You can now start typing your email and insert the fields that you want merged. To select the merge fields click on **'Insert Merge Field'**.
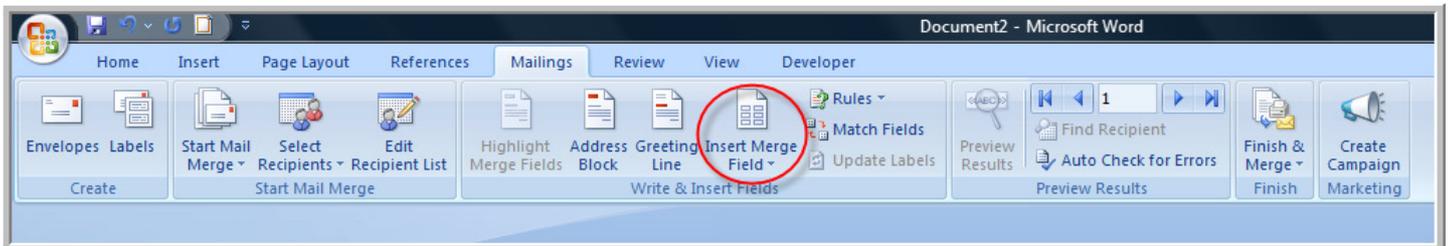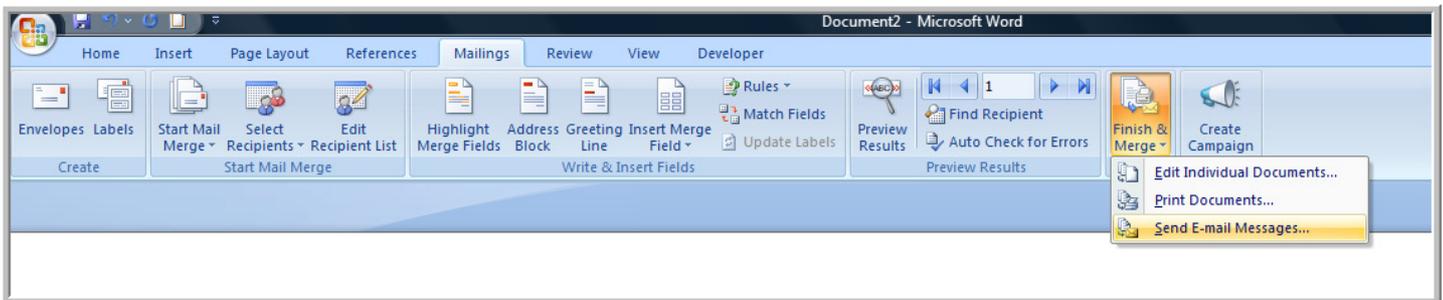

I have started my letter and entered two merge fields, circled.

When you have finished your email you can then click on **'Preview Results'** to see if you have the correct fields in your final product.

If it's all ok then you can click **'Finish & Merge'**.

Select **'Send email messages'**. You will then be presented with another screen and you can leave the defaults, just add in your subject line.
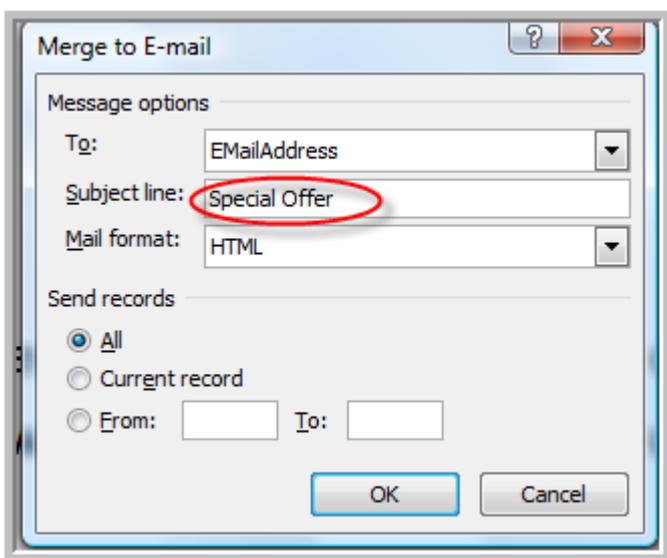
Click **'OK'**. The merge will then start and finish.

You can then save the template if you wish for future use depending on what it is. So, next time you want to do the mail merge you can use **'Merge to an existing document'** and use the one you just created. Otherwise, simply exit out of the document and your mail merge is done.

FAQ Number 4

Q. Does ClientConnect work on and Apple Mac?

A. Yes it does. Although ClientConnect is Windows based, if you have **'Paralells'** installed on your Mac, it will run ClientConnect without any problems. Paralells is software that lets you run Windows programs on your Mac.