

The Pulse – Issue 3

September '08

Hello to all of our valued customers!!

After last month's newsletter, you should all have your logo's on your home screen of ClientConnect and Daily Processing should be a part of your daily routine!!

Another REALLY IMPORTANT part of your routine is the regular BACKING UP of your database. At the end of your Daily Processing, there is an option to backup your database. We would recommend that you did this. Another way to do this is on an ad hoc basis is to go to the **'Application Menu' > 'Database Administration' > 'Backup/Restore database' > 'Backup Data' > 'Backup to local Folder'** and browse to the location where you wish to backup to.

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 3

The 'Field Chooser' feature.

In the **'Clients and Enquiries'** screen, there is a feature called **'Field Chooser'**. This is a reporting/display function which allows the user to customise what they see on the **'Clients and Enquiries'** screen. It can also be used to filter clients for **SMS** and mail merges. For example, if you only want to display clients who have their **'Preferred Reminder Method'** to be via SMS. You can then use this view to send an **SMS** to only those clients by doing an **SMS** merge. Or if you want to be able to quickly see what the current balance of your clients accounts are, you can do it here.

Access Method

Using the **'Field Chooser'**.

Firstly, right click anywhere on the headings.

Navigation Buttons: New Enquiry, New Client, Sell Service to Client, Convert Enquiry, Edit, Client Account, Session Services, Booking History, Find, Fitness Assessment.

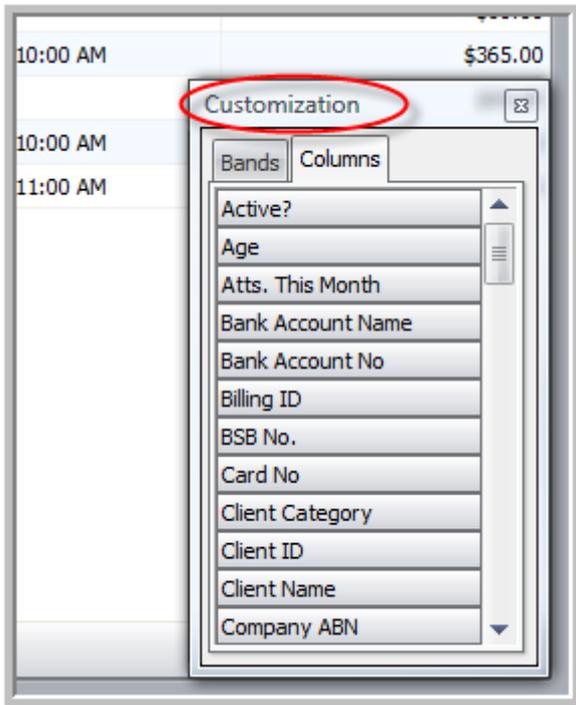
Client Type	First Name	Last Name	Home Phone
Client	Johnathan	Ashton	
Client	Mardi	Bishop	
Client	Carlie	Cartright	5555 4462
Client	Jason	Collins	

This will result in a drop down list. Select 'Field Chooser'.

Last Name	Home Phone	Mobile Phor
Ashton		9999 578 2
Bishop		9999 374 9
Cartright		9999 568 1
Collins		9999 895 3
cousins		
Day		9999 545 8
Elliott		9999 886 3
Jones		9999 647 2
kimmie		
maree		
Miller		9999 758 6
Norton		9999 566 2
over		
Parker		9999 586 2
Porter		9999 445 7

- Sort Ascending
- Sort Descending
- Clear Sorting
- Group By This Field
- Group By Box
- Footer
- Group Footers
- Remove This Column
- Field Chooser**
- Alignment
- Best Fit
- Best Fit (all columns)

Another box will appear on the bottom right, called 'Customisation', which contains field names.



Scroll down this list until you find the field called 'Preferred reminder Method'. Click on it and drag it up to the headings and drop it where you want it to be.

Account		Services	History	Assessment	Followup	Letter	SMS
Edit	Show		Find	Actions			
	Last Name	Preferred Reminder Me..	Home Phone				
	Ashton	SMS					
	Bishop	(Do not contact)					
	Cartright	Telephone	5555 4462				
	Collins	SMS					
	cousins	(Do not contact)					

it is now a heading

If you hover your cursor over the new heading, a small arrow will appear.

Last Name	Preferred Reminder ...	Home Phone
Ashton	SMS	
Bishop	(Do not contact)	
Cartright	Telephone	5555 4462
Collins	SMS	
Cousins	(Do not contact)	
Day	SMS	

Click on this arrow and it will list all of the contact methods you have against your clients.

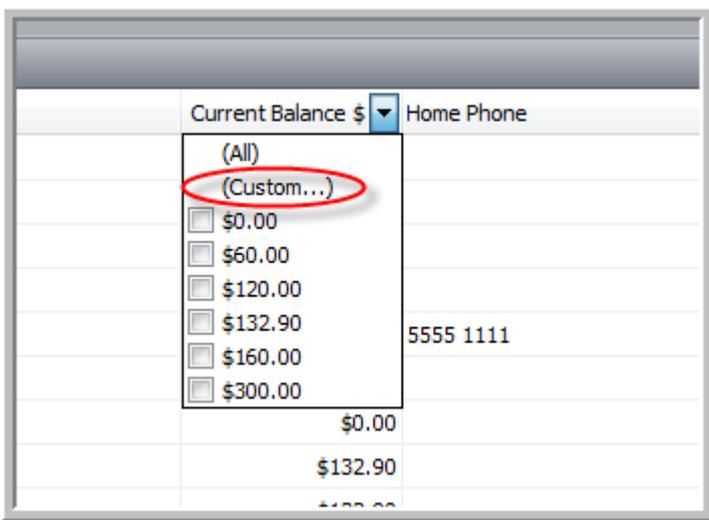
Last Name	Preferred Reminder ...	Home Phone	Mobile Phone
Ashton	(All)		9999 578 2
Bishop	(Custom...)		9999 374 9
Cartright	<input type="checkbox"/> (Do not contact)	5555 4462	9999 568 1
Collins	<input type="checkbox"/> E-Mail		9999 895 3
Cousins	<input type="checkbox"/> SMS		
Day	<input type="checkbox"/> Telephone		9999 545 8

You can click on the method that you want display. For example....SMS.

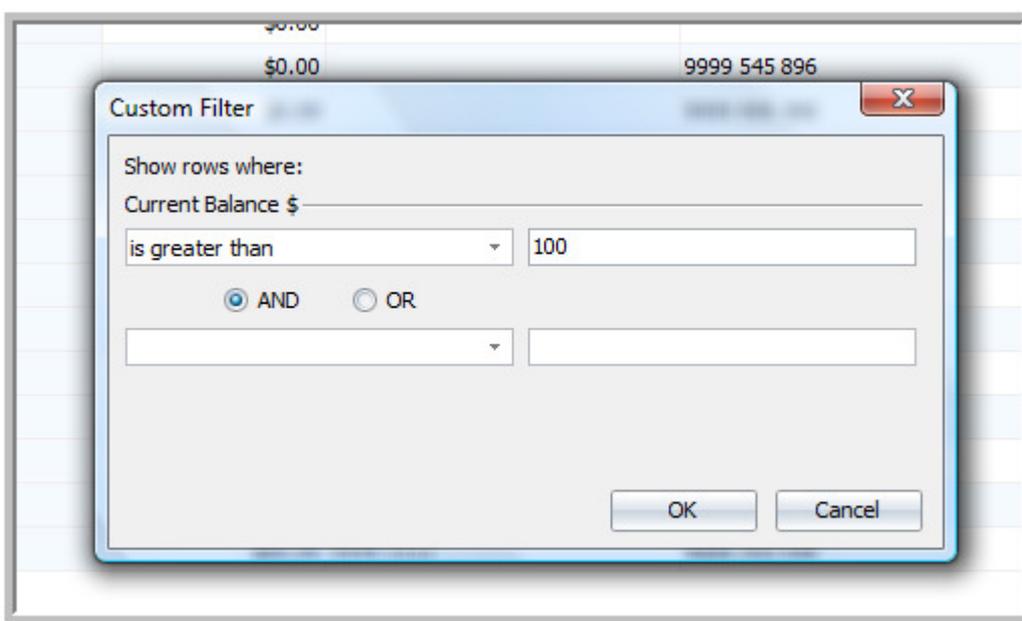
Last Name	Preferred Remin...	Home Phone	Mobile Phone
Ashton	(All)		9999 578 2
Collins	(Custom...)		9999 895 3
Day	<input checked="" type="checkbox"/> SMS		9999 545 8
Elliott	<input type="checkbox"/> E-Mail		9999 886 3
Miller	<input type="checkbox"/> Telephone		9999 758 6
Parker	SMS		9999 586 2
Porter	SMS		9999 445 7
Scott	SMS		9999 243 7
Williams	SMS	5555 1111	9999 443 5

This will list only those clients who want to be reminded via **SMS** in your view. If you click on **'email'** only those clients who want to be contacted via **email** will be displayed in your view. You can then do an SMS or mail merge with only those clients.

If you want to see the account balance of all of your clients at a glance, simply go to the filed chooser again, drag **'Current Balance \$'** up to the headings and there you have their current balance. If you then want only balances over a certain amount, click on the heading arrow to get the drop down box and select **'Custom'**.



This will bring up a screen where you can specify extra filtering criteria. I used **'Greater than'** and **'100'**. I now get only those clients whose balances are over \$100.



Clients and Enquiries Management					
 Daily Processes: You have not yet executed your daily run for one or more previous days. Click here to execute them now.					
Client Type	First Name	Last Name	Current Balance \$	Home Phone	
Client	peter	collins	\$132.90		
Client	pete	Becker	\$132.90		
Client	my	mum	\$132.90		
Client	Mark	Norton	\$120.00	5555 5283	
Client	Johnathan	Ashton	\$300.00		
Client	asheligh	becker	\$160.00		

Make sure that you change the filter criteria back to display 'All' (this will display everything again) and then you can right click on the newly added heading and select '**Remove This Column**'. The column will no longer show.

Current Balance \$	Home Phone
(All)	
(Custom...)	
<input type="checkbox"/> \$0.00	
<input type="checkbox"/> \$60.00	
<input type="checkbox"/> \$120.00	5555 5283
<input type="checkbox"/> \$132.90	
<input type="checkbox"/> \$160.00	
<input type="checkbox"/> \$300.00	

If for some reason, you have made a lot of changes and can't remember what they were, simply exit and re-enter ClientConnect and all fields will be back to normal.

You can use the "**Field Chooser**" for any number of things to be displayed and it is handy for 'one off' type displays. It is worth spending some time having a look at this area as you may find it useful. You can always print from here too.

FAQ Number 3

Q. Why do I make a client inactive, how do I do it and can I make them active again?

A. If you have a client who has not bought a service for a while and you think they may not come back but you don't want to delete them, you can make them inactive. If they remain inactive for a year, they will no longer count towards your number of clients allowed. To make a client inactive, from the **'Clients & Enquiries'** screen right click on the client, go to **'Make Client Inactive'** in the drop down list and click. Then fill in details in the next screen. The client is now inactive. To make them active again, one way is to sell them a service/membership. The other way is to open up their clients file, clear the **'Inactive as of'** date and **'Inactive reason'** fields.