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 and 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

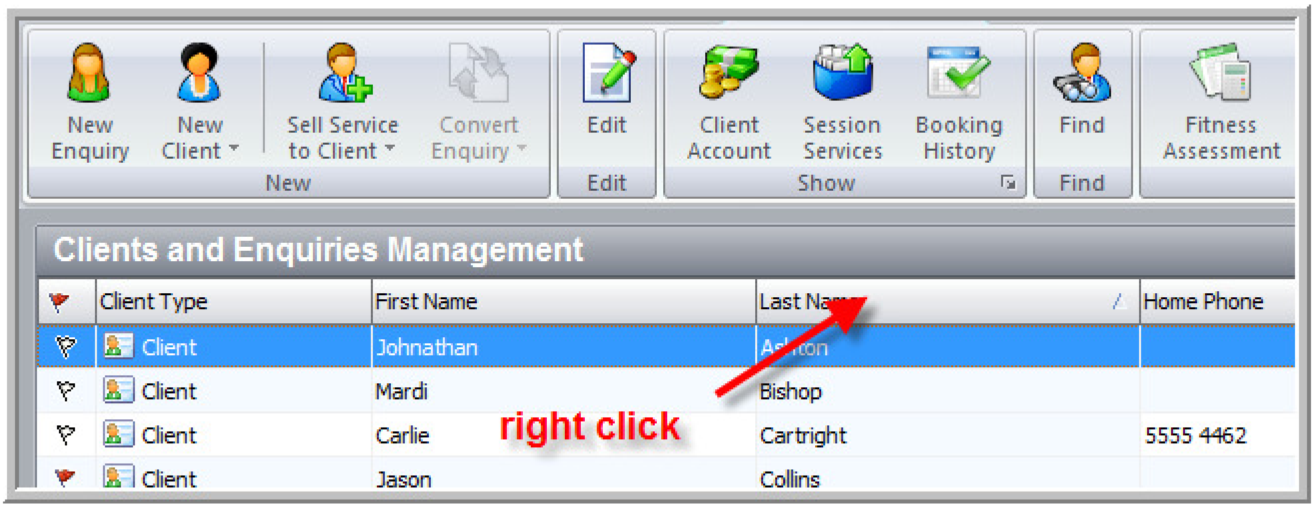
The 'Field Chooser' feature.

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.

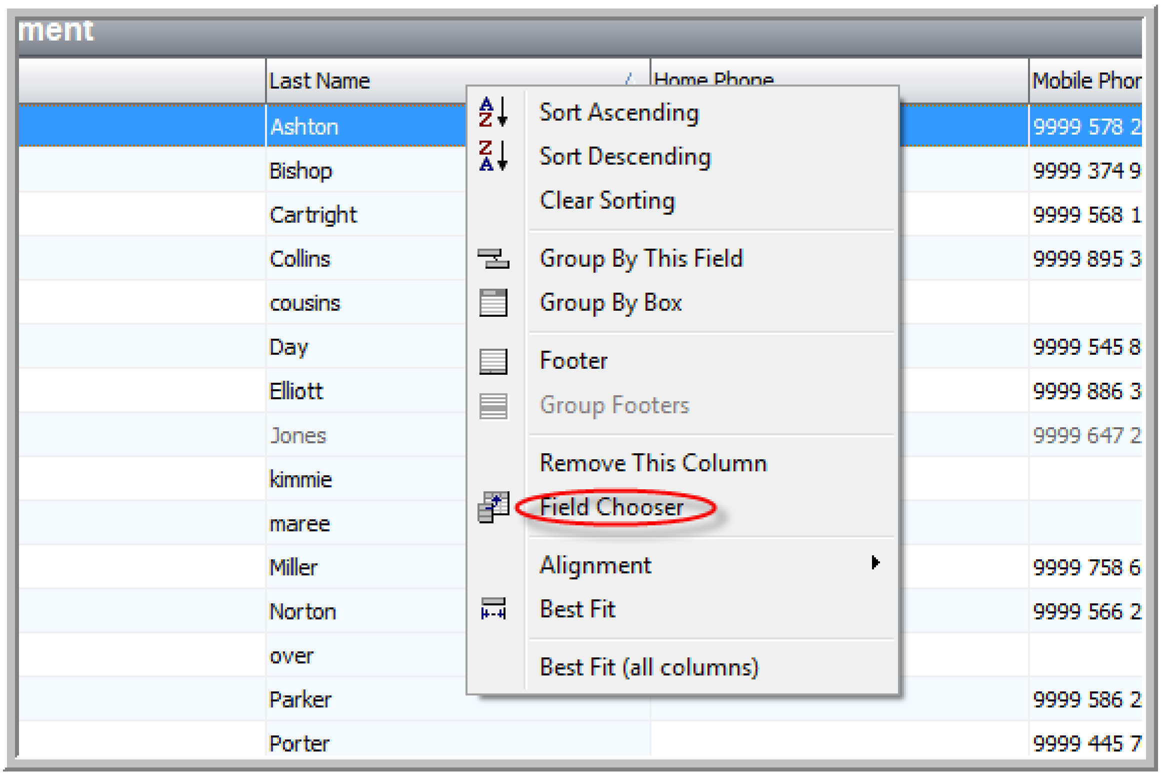
<u>**Access Method**</u>

Using the **'Field Chooser'.**

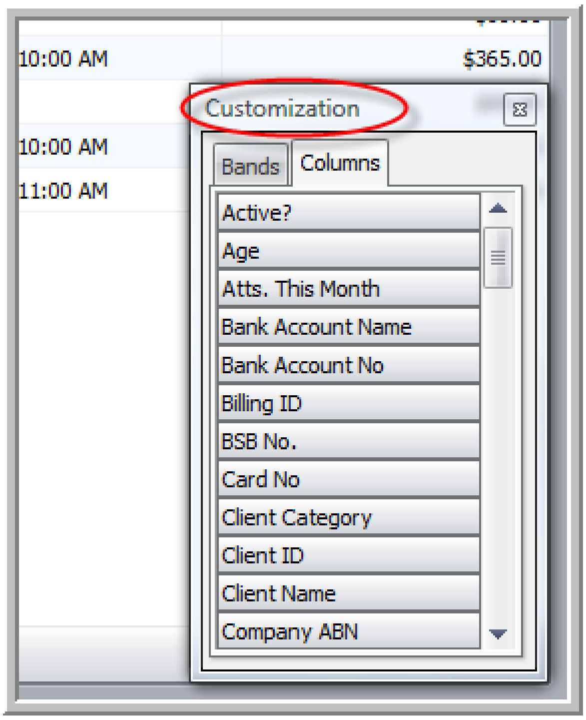
Firstly, right click anywhere on the headings.



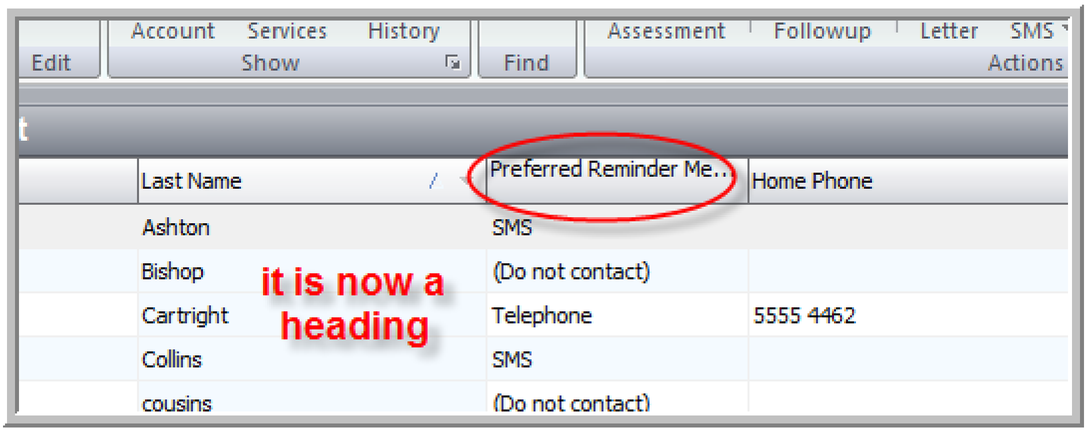
This will result in a drop down list. Select '**Field Chooser'.**



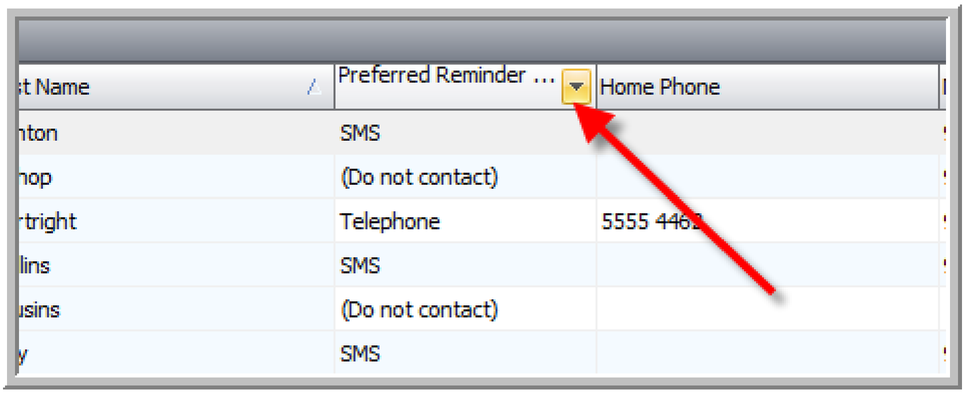
Another box will appear on the bottom right, called **'Customisation'**, which contains field names.



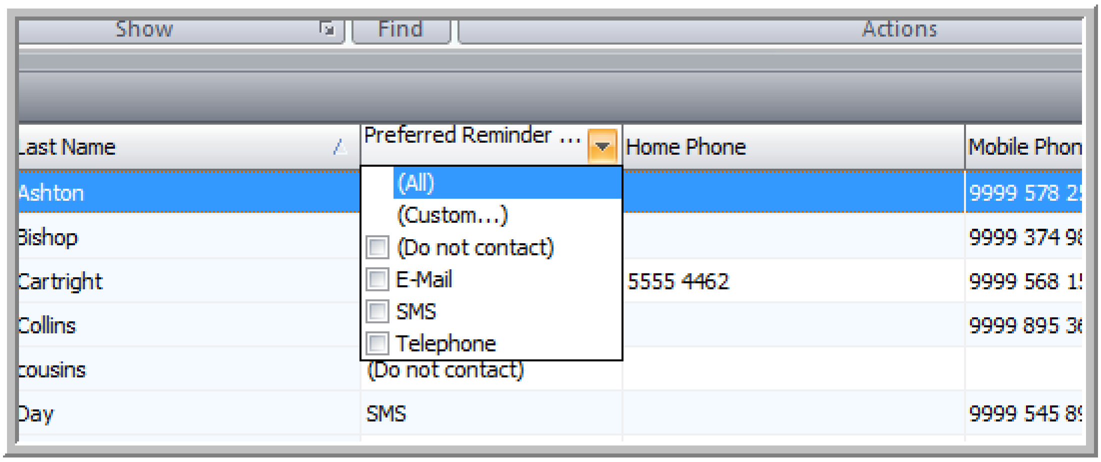
Scroll down this list until you find the field called **'Preferred reminder Method'**. Click on it and drag it up to the headings and drop it where you want it to be.



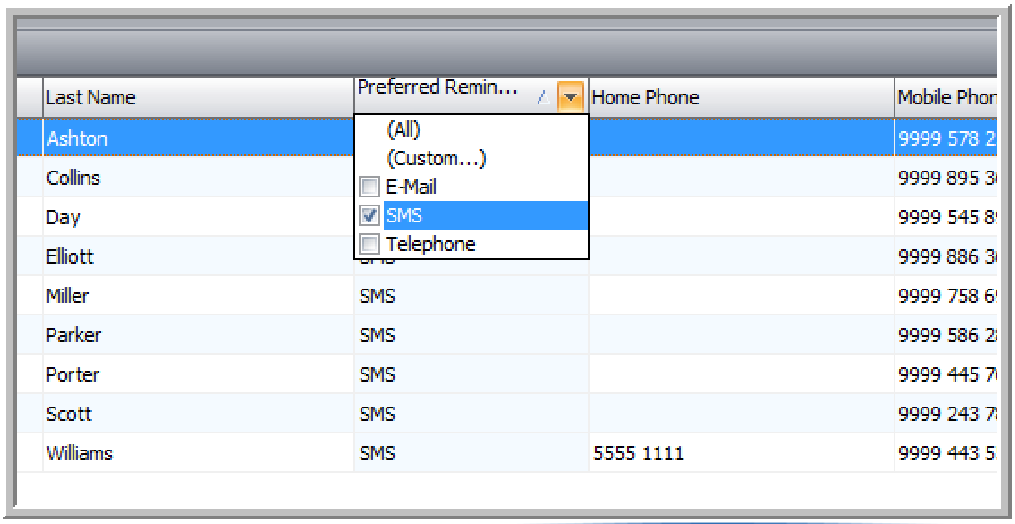
If you hover your cursor over the new heading, a small arrow will appear.



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

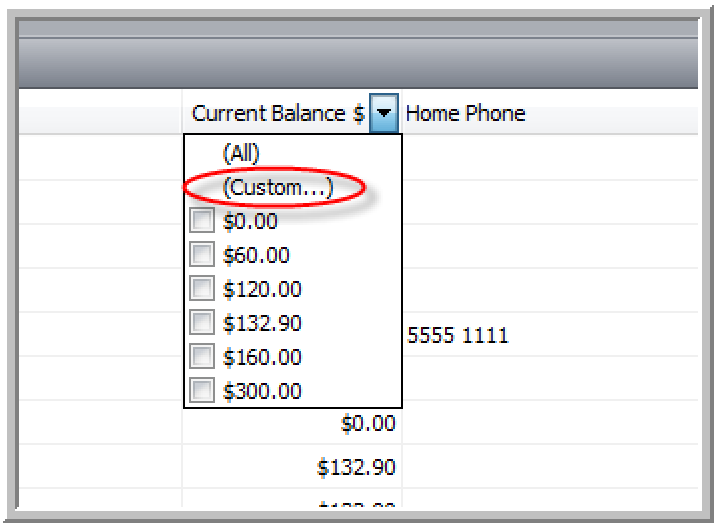


You can click on the method that you want display. For example....**SMS**.

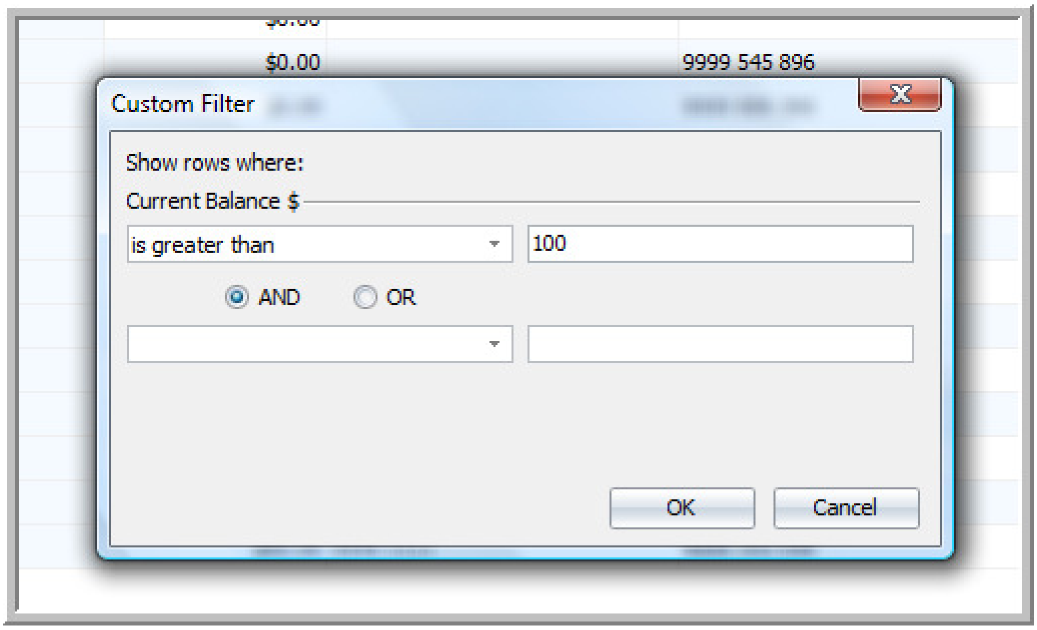


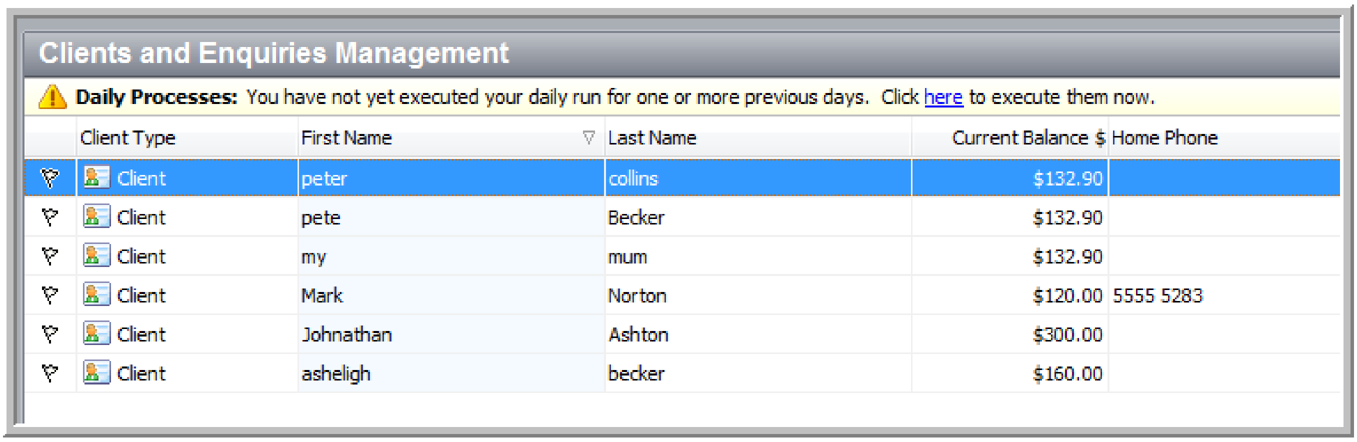
This will list only those clients who want to be reminded via **SMS** in your view. If you click on **'email'** only those clients who want to be contacted via **email** will be displayed in your view. You can then do an SMS or mail merge with only those clients.

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. I you then want only balances over a certain amount, click on the heading arrow to get the drop down box and select **'Custom'**.

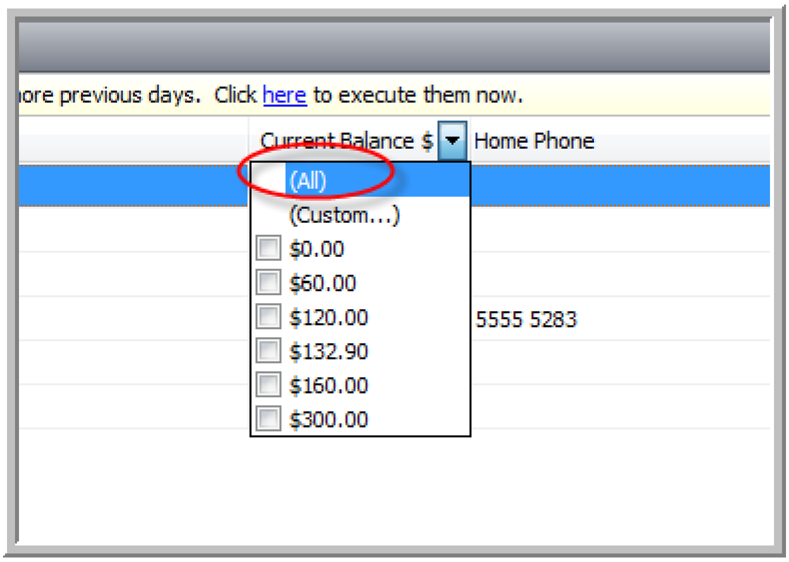


This will bring up a screen where you can specify extra filtering criteria. I used **'Greater than'** and **'100'**. I now get only those clients whose balances are over $100.





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.



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.