

The Pulse – Issue 10

May '09

Hello CC'ers!!

Well, it has definitely started!!! The 'I can't be bothered getting out of the house' syndrome!!! It's cold and dark and the couch is looking pretty warm and cosy. It's hard enough to drag myself out at 8 PM for a 9 PM hockey game in the cold and wet and you want me to go to the gym too?!?!?! Are you kidding me?!?!?! So, keeping your clients motivated is the hardest thing at this time of year.....I am a prime example of that! Is that why they call it Boot (up the bum) Camp?!?!?

RELEASE NEWS

With the very positive feedback we are receiving on Version 4, we would now like to continue the roll out to all our clients.

Again, could you all please check which version of ClientConnect you are currently running (bottom right corner of your screen). If you are still running V3, check that you are running V3.5.0.46 which will be our last release of Version 3. V3.5.0.46 is a pre-requisite to upgrading to Version 4 so you will need to upgrade to this version before upgrading to V4.

For V3 users **please backup your database first** and then exit ClientConnect. Click on the below link and follow the prompts to install V3.5.0.46. If you are networked, **close** ClientConnect on **ALL** computers, download V3.5.0.46 on **ALL** computers and **THEN** run the upgrade on each computer.

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

For those of you on V3, once you have upgraded to V3.5.0.46, contact us and we will schedule a time to assist you in upgrading to V4 and migrating your data across from V3 to V 4.

Reminders

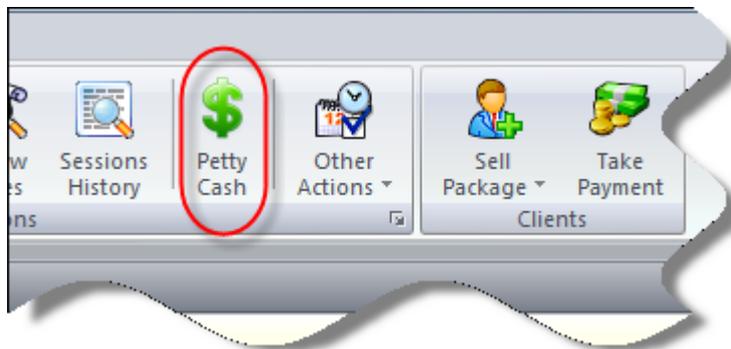
Many of you still send any support questions to our individual email addresses which can be a problem if we are away for a day or two – urgent enquiries won't get answered. Please remember to send all emails to support@pulsetecsolutions.com so **ALL** of us in the support team get them. One of us **WILL** answer you. You can also phone us directly on +61 (0)3 9872 5856.

Handy Hint Number 9

Version 4 – what's new?!?!

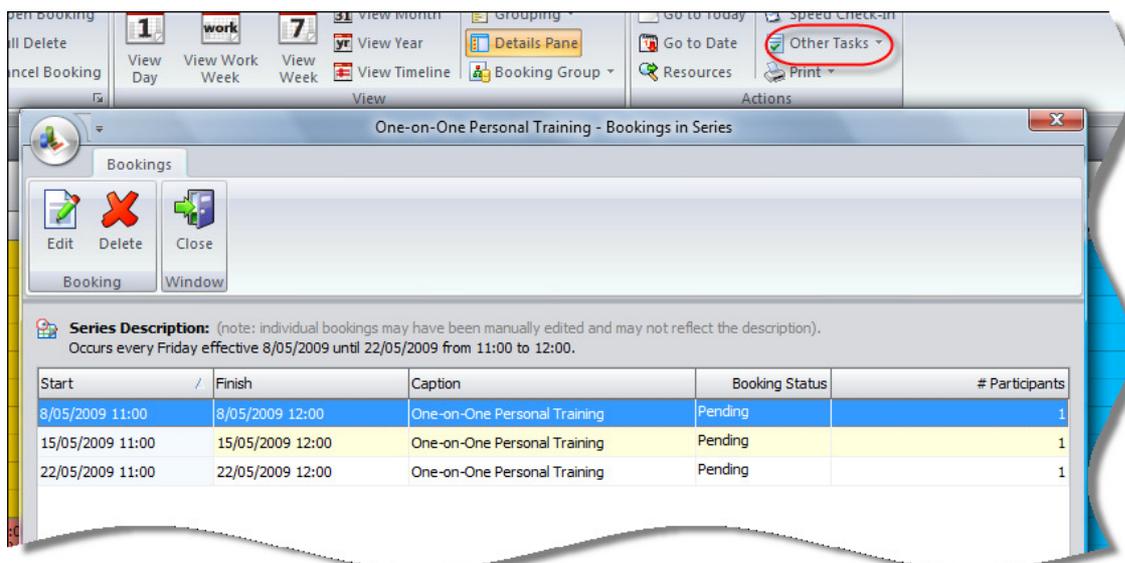
1. 'Petty Cash' handling in POS.

May fig 1

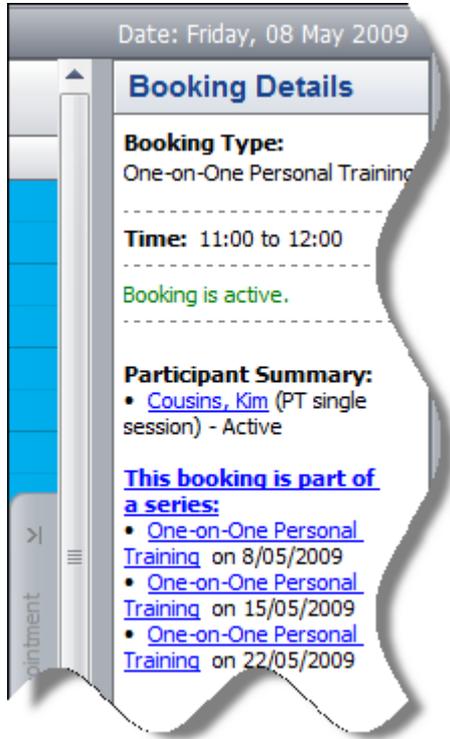


You withdraw the cash required for your purchases then you record the receipt amount and the change put back into the till – a 3 part process to balance everything out. These transactions are also shown in the z-out and Show Sales report

2. A new option to 'View bookings in Series' under 'Other Tasks' when a booking that is part of a series is highlighted in Bookings Explorer.



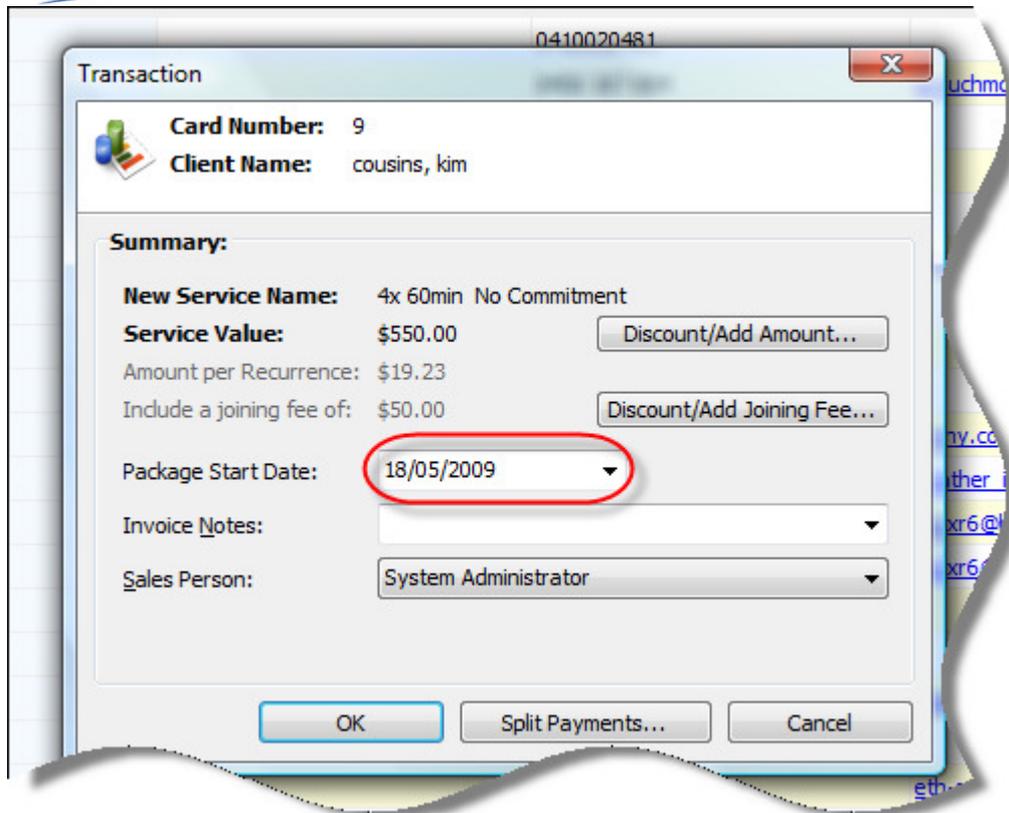
3. If a booking is part of a series, the entire series is now displayed in the 'Details Pane'.



4. 'Last Renewed Date' is now specific to memberships and a new field 'Last Service Purchase Date' is specific to packages.

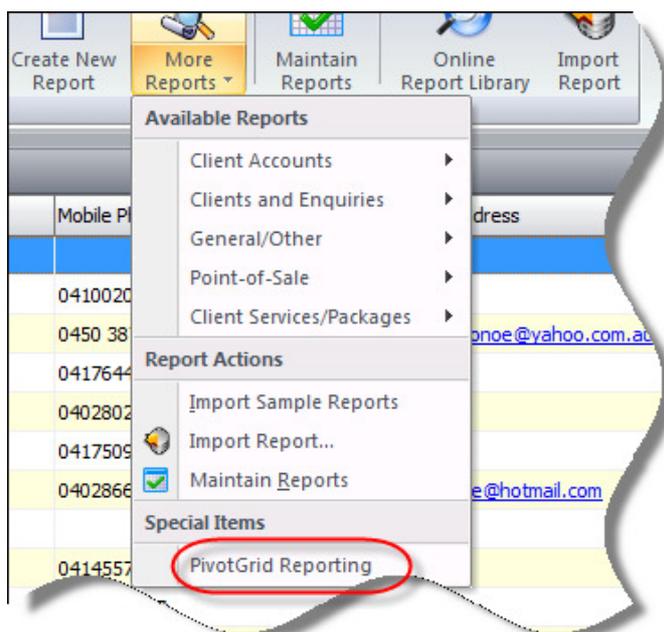
Last Name	Last Service Purchase Date	Last Renewed Date	M'ship Expi
Collins	8/05/2009	7/06/2009	
Bishop		5/05/2009	31/05/2009
Scott		5/05/2009	
Card			15/05/2009

5. 'Package Start Date' can now be set when selling a recurring service.



You can now begin a recurring package from a specified date, future or past, and invoices will be created from the specified date.

6. 'Pivot Grid' reporting can now be done by 'Year' and 'Month'.



PivotGrid Reporting

Drop Filter Fields Here

Client Name ▾

Booking Start (Year) / Booking Start (Month) /

Resource Name / Booking Type	2009		2009 Total
	April	May	
<input type="checkbox"/> Lynne Parker Group Training	1		1
<input type="checkbox"/> Massage Room Massage Therapy	1		1
<input type="checkbox"/> Massage Room One-on-One Personal Trai			4
Massage Room Total	1	4	5
<input type="checkbox"/> Peter Watson Group Training			1
<input type="checkbox"/> Peter Watson One-on-One Personal Trai			3
Peter Watson Total		4	4
<input type="checkbox"/> Sue Masters Group Training			1
<input type="checkbox"/> Sue Masters One-on-One Personal Trai			2
Sue Masters Total		3	3
Grand Total	2	11	13

7. In 'Manage services & packages' you can now set an option to automatically generate a followup flag when sessions have reached a user defined threshold. It is displayed in 'Daily Processing' and also a button in 'Common Tasks'.

Service Renewal Reminders

If you would like to have this service participate in the automatic generation of followups when the sessions remaining reach a certain level, turn this option on.

Include in followup generation when sessions remaining reach the threshold

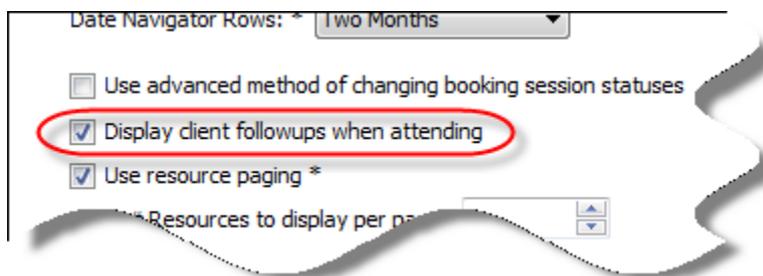
Session Left Threshold:

Followup date days to add:

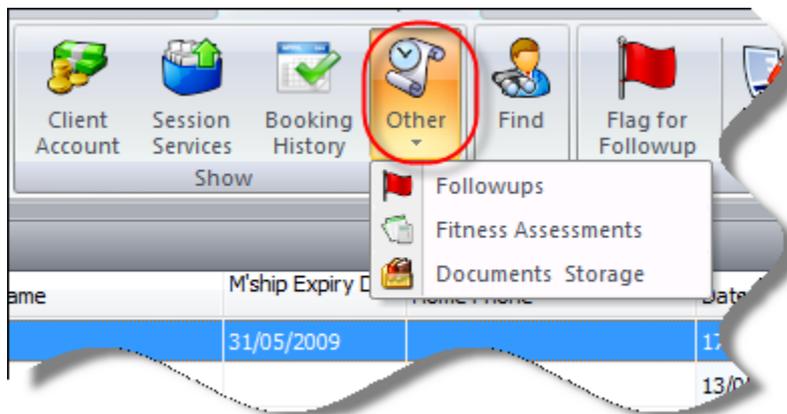
For example, if you sell a 20 pack, you can set the followup threshold to 5 and ClientConnect will create a Followup Flag once the client's sessions hit 5 remaining. Don't use it for single sessions as there is no point

or packages that allocate sessions on a weekly/fortnightly/monthly basis as you will be inundated with followups.

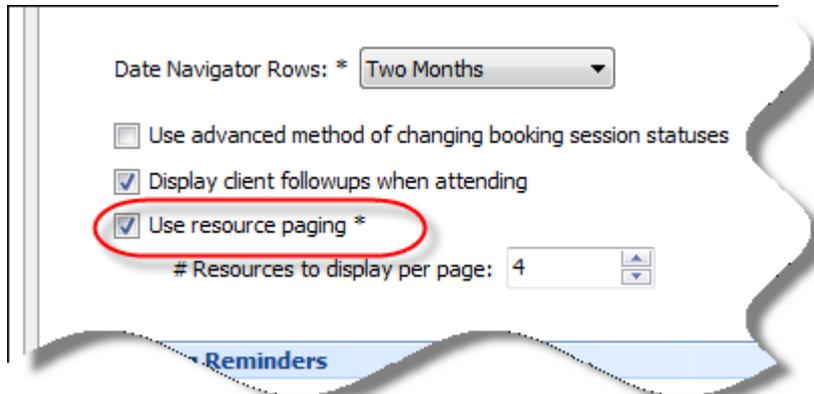
8. When processing **SMS's**, any failed numbers will now be listed.
9. A client's debit details are now included on the screen when **Direct Adding** of a client.
10. When attending a client in a booking, a new screen will pop up if they have any followups pending. You need to activate the option from **'Control Panel' > 'Client Session Options' > 'Bookings Explorer Options'** and scroll down to **'Display Client Followups when Attending'**.



11. A new **'Other'** button on the **Clients & Enquiries** screen which has **Fitness Assessments, Followups** and **Document Storage** on it.



12. New button in **'Common Tasks'** tab – **'SMS Outgoing Queue'** which allows you to manage unsend SMS's.
13. New **Resource paging** option can be set in **'Control Panel' > 'ClientConnect Options' > 'Bookings Explorer Options'** for those who have a large number of resources. It allows you to scroll through your resources rather than ticking and un-ticking them all of the time.



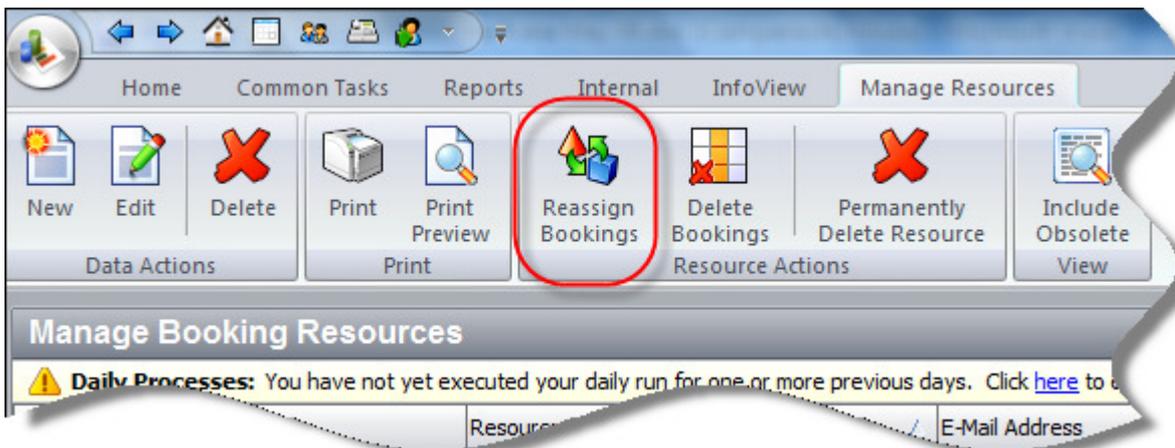
14. The **Sign-in** screen now differentiates between **'Inactive'** and **'Expired'** clients.

15. You can now use customised sounds for the **'Unattended sign-in'** screen – found under **'Control Panel' > 'ClientConnect options' > 'General Settings'**.

FAQ number 9

Q. If a trainer leaves, can I reassign all of their booking?

A. Yes you can. Go into the **'Application Menu' > 'Control Panel' > 'Manage Booking Resources'**. Highlight the trainer whose bookings you wish to reassign and then click on the **'Reassign Bookings'** button.



You can then choose to reassign all or some bookings and who to reassign them to.