



The Pulse – Issue 17

December '09

Hello CC'ers!!

Fa la la la la, la la la laaaa!!!! Well, it is here again.....over indulgence season! It has been a very busy year for us here with the release of Version 4 of the software and moving all of you to the SQL Server based system. Our client base has increased greatly as more Gym's and Studio's discover the abilities of ClientConnect and move across from other systems. And we now have another new release of the software, Version 4.1, the details of which are in this month's newsletter. So, from all of us here at Pulse Tec Solutions, have a wonderful Christmas and a safe New Year!!

Reminders

Over the main Christmas to New Year days, skeleton staff will be on so it will be **REALLY IMPORTANT** to send any support emails to support@pulsetecsolutions.com not to our personal ones 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 16

Version 4.1 – what's new?!?!?!

Below is a list of all the changes/enhancements in V4.1. We have a more detailed set of release notes with screen shots on our website. To view, please click on the following link.

Bookings Explorer

1. **NEW:** You can now add and remove participants from a booking *series* (save multiple). Option to add/remove a client from a chosen booking only OR all future bookings in the series from the booking you are editing onwards.
2. **ENHANCED:** In the Booking Explorer under Other Tasks when sending SMS booking schedules to Resources, you can now select which Resources to include.
3. **ENHANCED:** Session Status has now been added to the 'Print Listing of Today's Bookings' screen.

Clients & Enquiries

1. **CHANGED:** The 'Tags' dialog has been redesigned to be simpler to use (including editing the Master List). It is in the 'Personal Details' tab. Refer to the online help for more details on this feature.
2. **NEW:** You can now directly add services to clients without having to actually sell one.
 - a. For example, if, as part of your membership, clients receive 10 PT classes for free, you can now give them that package without having to sell that service to them (there will be no invoice raised for this package).
 - b. The option must be ticked in 'Control Panel' > 'ClientConnect Options' > 'General Settings'. ClientConnect closed and reopened for change to take effect (*).
3. **CHANGED:** 'Inactive' (greyed out) clients are now those with
 - a. expired memberships and no package
 - b. expired package and no membership
 - c. expired membership and expired package
4. **CHANGED:** Clients who have expired memberships or no valid packages are automatically flagged as Inactive during the EOD process.
5. **CHANGED:** You can no longer manually enter an Expiry Date for an open-ended recurring membership. You must cancel them (refer to next point). Termed membership expiry dates can still be changed.
6. **ENHANCED:** Added a new 'Cancel Membership' option to cancel memberships because of the above change. This option is under the 'Other Tasks' button on the Clients & Enquiries screen ribbon.

Sign-in Screen

1. **CHANGED:** Sign-in options now have their own entry in the Control Panel → ClientConnect Options screen. Go to 'Control Panel' > 'ClientConnect Options' > 'Sign-in Options'.
2. **NEW:** You can now specify your own custom sound files (.wav) which are used on the Unattended Sign-in Screen. Found in 'Sign-in Options'.
3. **NEW:** The Sign-in Screen can now be set to display as a popup window (either modally or non-modally) which you can alt-tab between.

4. **ENHANCED:** Added ability to display a birthday prompt when signing in a client (attended/unattended).
5. **ENHANCED:** Unattended Sign-in screen now displays a warning if client is inactive.

Control Panel

1. **ENHANCED:** Booking Type timeslots now support up to 1.5 hours of 5 minute increments.
2. **ENHANCED:** Added ability to change the debit pricing for open-ended recurring memberships via the Edit Membership Type screen. 'Control Panel' > 'Manage Memberships Types'.
 - a. If you have a general price increase for a membership, you can change the price and now update all of your clients on that membership so their future invoices will reflect the new price.
 - i. Does not apply to termed memberships as their invoice/instalments are created upfront.

Accounts/Transactions/Billing

1. **CHANGED:** When selling Recurring memberships, you can now specify when a clients' periodic billing date is to start and then continue on that cycle. Pro-rata is also calculated for the invoice if the billing start date is in the future.
2. **ENHANCED:** Added full Pro-Rata support to recurring membership/package sales.
3. **NEW:** Added a "MYOB Transactions" button on the 'Common Tasks' tab of the toolbar.
4. **ENHANCED:** When doing 'Process Billing', you can now export the billing list to Excel for checking before processing.

POS

1. **CHANGED:** The security setting 'Print POS Reports' now also applies to the Z-Out and X-Out and Session History screens.
2. **CHANGED:** When making a sale in POS, if you cancel out of the 'Payment Method' screen, CC no longer clears out the sale.
3. **ENHANCED:** Added a new 'Quick Sale: Cash' button to the POS screen for 'one-click' selling of goods.
4. **CHANGED:** If you have the 'Always Print Receipt' option ticked in Options, POS will automatically print a receipt when the sale is completed.
5. **CHANGED:** POS receipts to **docket** printers now include the words "Tax Invoice" at the top.
6. **ENHANCED:** Added a new button in the Show Sales screen: "Display Invoices Only".

7. **ENHANCED:** A button added to the 'Show Sales' report which groups by Stock Group and gives a total for each group.
8. **CHANGED:** The Payment screen in POS works a little differently now. When you press [Enter], the cursor places the calculated amount in the current cell, not the next cell.

Reports

1. **NEW:** In the 'Reports' tab, there is a new 'Online reports Library' button which will list any new reports added which you can then download. You will also find a host of new reports in the library.

Remuneration

1. **ENHANCED:** You can now do pay overrides for individual Resources in the Remuneration screen. You can override ALL bookings for that resource or just certain booking types for that resource.
2. **CHANGED:** Cancelled bookings are no longer included in remuneration.

GENERAL

1. **CHANGED:** General update for Windows 7 compatibility.
2. **ENHANCED:** You can now press [Ctrl] + 'NumPad+' and [Ctrl] + 'NumPad-' to fully expand/collapse InfoView groupings in InfoView-based screens and reports.

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 a pre-requisite to going to V4.1.

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.

