Hello CC'ers!!

In Victoria for the last month, we can take the expression 'It never rains but it pours' quite literally! The drought has broken and I actually went out and bought gum boots last week!!!! And yes, I even jumped in some puddles. With all of this rain, outdoor training for some of you will have been made a little trickier and hopefully has not daunted your clients. I have again joined my local gym and will be working hard to shift those extra winter kilos and get my cardio fitness back up to scratch (summer hockey is just around the corner), so stay tuned for the groans of muscle soreness and the gasping breath of burning lungs!

Reminders

PLEASE send any correspondence to support@pulsetecsolutions.com NOT to our personal emails 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 9878 7813.

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 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 24

The Responsible Parties Tab

What is a Responsible Party?

The Responsible Parties tab is useful where you may have more than one member booking in for services, but the accounts are all handled by one overseeing account. For example, a company that purchases sessions for many employees, or family members that attend with billing going to one family member.

This enables a package/service to be sold and invoice to be raised for the Responsible Party, while the individual members can book for sessions coming from this invoice/package. Currently, this function only applies to services, not memberships.

Step 1.

Create a new client that will be the 'Responsible Party' and sell them a service/package. (**Note**: this 'client' will be used for the billing side of things – but currently *cannot be directly booked in for services/sessions* itself). It is recommended that you use the Company Name or Family Name of the responsible party.
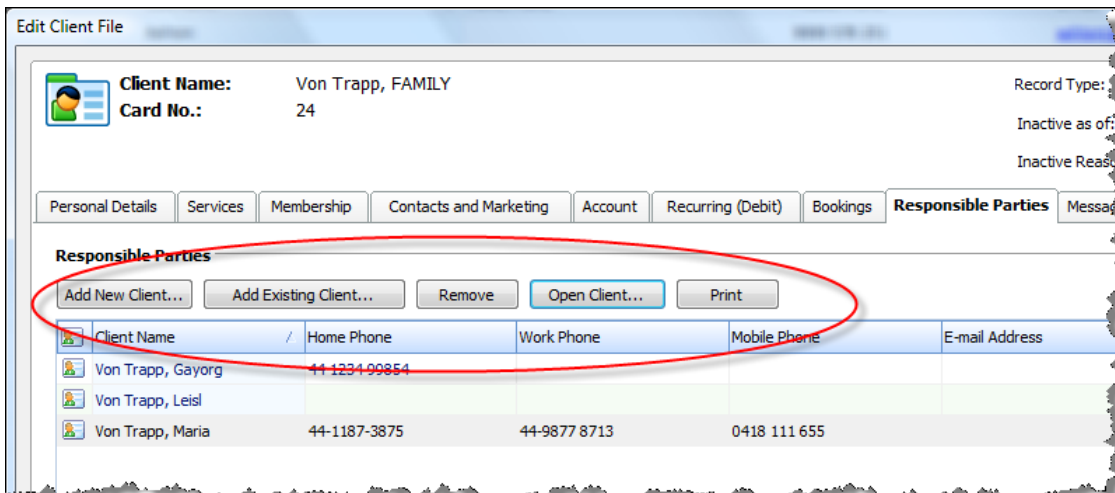
Sept fig. 1

Step 2.

Edit this 'client' and go to the Responsible Parties tab.

This is where you would add the members that will be covered by this arrangement (eg. the employees or children). You can select 'Add New Client' to create a new client in ClientConnect and then link them to this Responsible Party. You can also use 'Add Existing Client' if the client is already set up in ClientConnect and just needs to be linked to the Responsible Party.
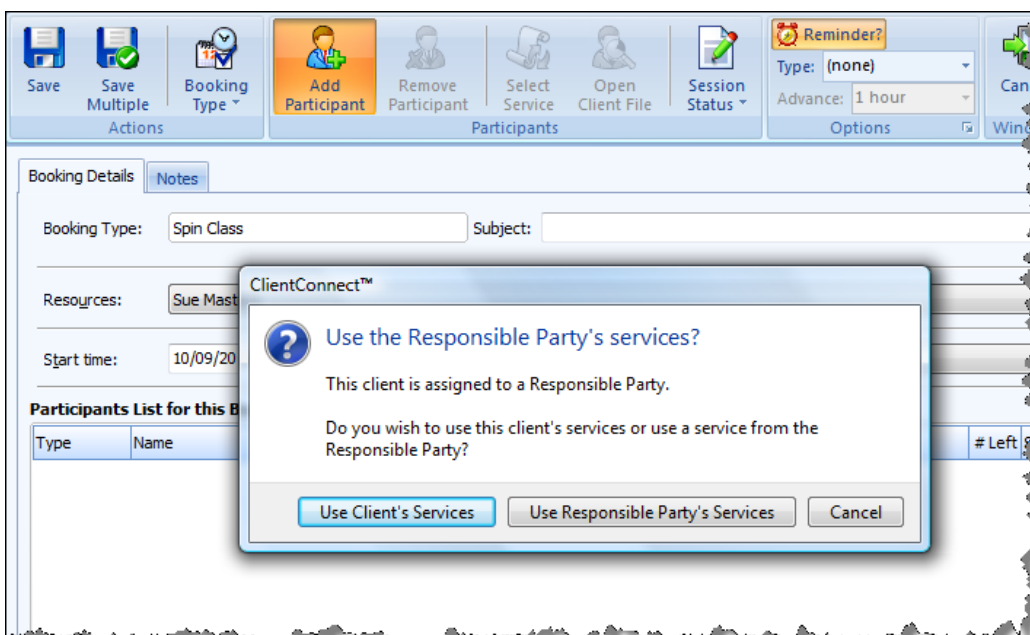
Sept fig. 2

In the example above, the 'Von Trapp FAMILY' is the Responsible Party, with 3 family members attached. These 3 family members can be booked for sessions and the billing is all directed to the FAMILY account.

Step 3

When you make a booking for any of these family members, the following message will appear. You need to select whether you want to use the Client's own service, or the Services purchased by the Responsible Party.
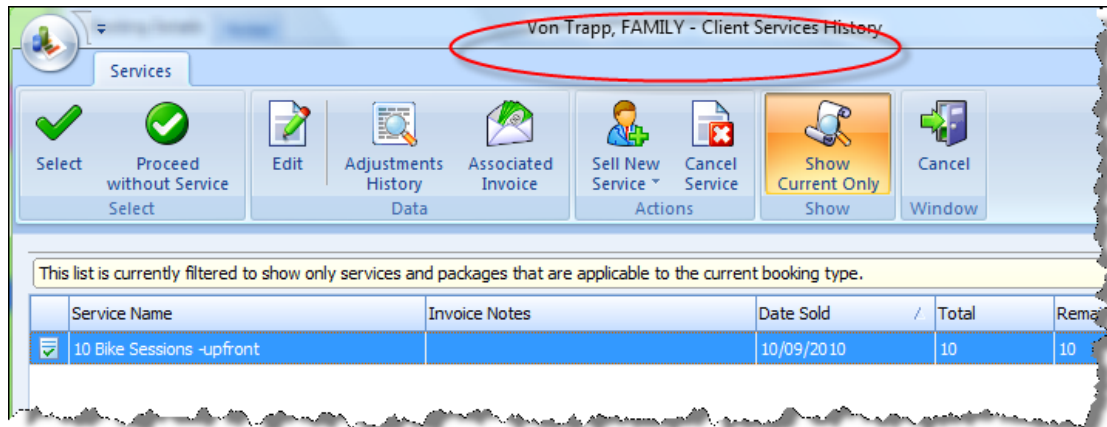
Sept fig 3.

Click on the 'Use Responsible Party's Services' button to select the relevant service.
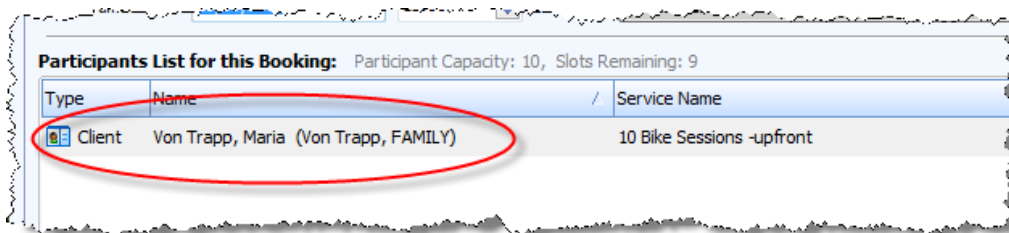
The following screen will then appear.

Sept fig 4.

Note that these are the services purchased by the Responsible Party.

Sept fig 5.

The participating family member will then appear in the booking, showing that it is the FAMILY services being used.

If you view the Accounts tab for Maria Von Trapp, she has no invoices/transactions. The billing is all handled by the FAMILY Von Trapp.

MEMBER KEYTAGS

Did you know that we can produce customised key tags for your Gym or Studio?

Key tags are a convenient and low cost way to brand your club or studio and identify your Members.

Why not have your full colour logo on the front, and the barcode /member number on the reverse for easy scanning. We can also include some basic contact and marketing information for you, including web address if desired.

Key tags are $0.70 each plus a onetime setup fee of $75. We can also supply barcode scanners, cash drawers and receipt printers at very competitive prices.

Visit www.pulsetecsolutions.com for more details.

RELEASE NEWS

Version 3 Users

Please contact us ASAP so you can upgrade to Version 4. We are no longer doing any enhancements to V3.5.

Version 4 users

Please contact us for information regarding the download of our new release, V4.1.0.30.