Hello CC'ers!!

I went on a 'Girls Weekend' a week ago and the place we stayed had this great spa. So I got the bikini on and my jaw nearly dropped to the floor! Where the heck did all of THAT come from? Yes, I have been a bit slack (well actually, a lot slack) since the weather hit arctic temperatures and I have noticed that my jeans are just a little bit tighter. Looks like it's time for me to once again start practicing what you all preach. Get moving!!!

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 23

Reporting on Point of Sale

What is a Point of Sale Session?

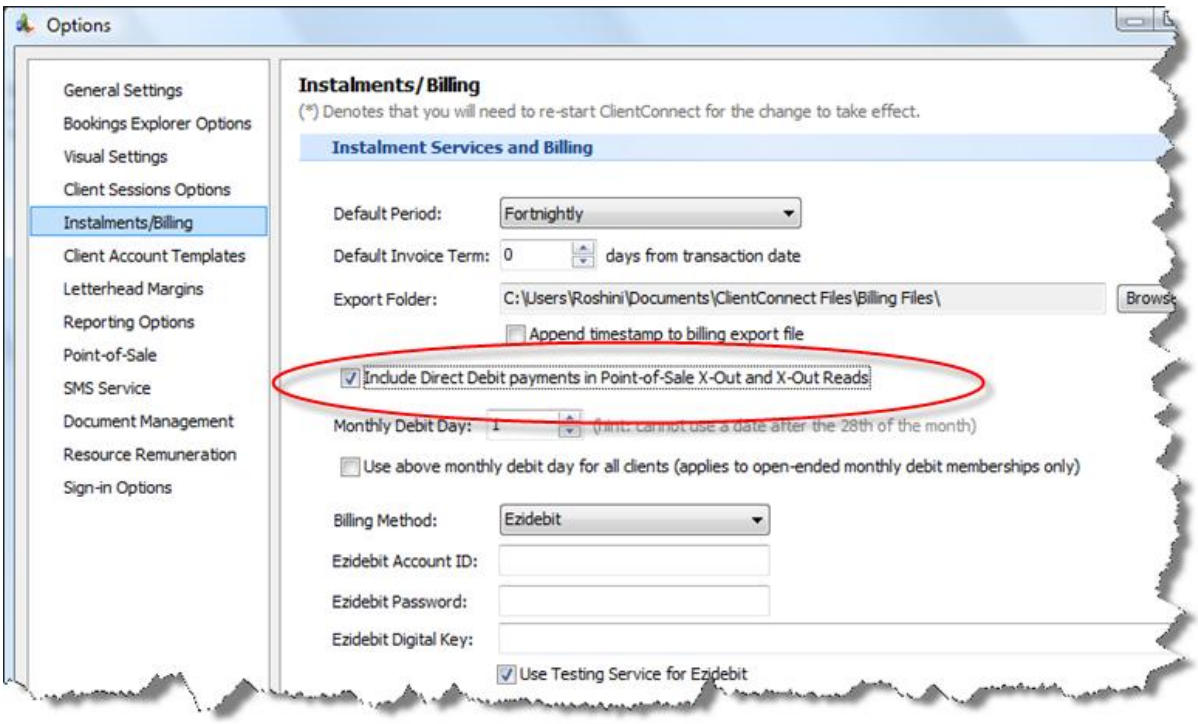
In Point-of-Sale, a Session is simply a period of time during which you make sales and receive payment. If these sessions are broken down into meaningful periods of time, your business reporting is clearer and easier. Sessions are typically defined as daily, but they can be as short or long as you like e.g. whenever there is a change-over of staff.

Sessions are delineated from one another by performing a Z-Out and 'closing the session'. This is where you nominate a particular time as being the end of one Session and the start of the next one. At this point, you would then count and tally up the sales and money received during that session. This process is called *closing the session*.

Control Panel Setting for X and Z out

From the **Application Menu**, select **Control Panel – ClientConnect Options.** Scroll down and select the option for **Instalments / Billing**. On this screen, there is a check box "Include Direct Debit payments in Point-of-Sale X-Out and X-Out Reads".

Aug fig. 1



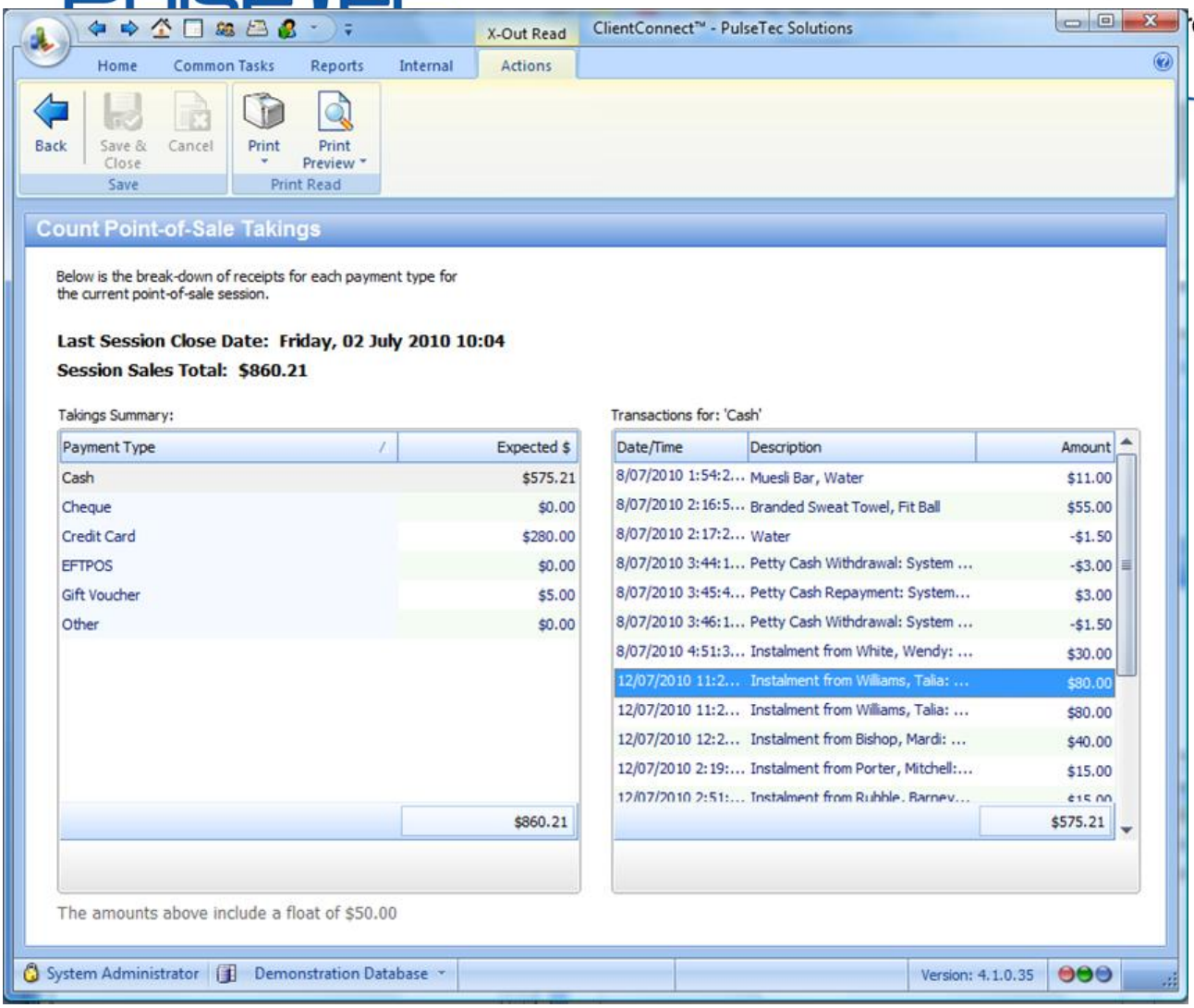
When this box is checked, any payments processed as being received as part of the Direct Debit processing will be included in your Point-of-Sale X-Out and Z-Out Read reports. Having this option turned on is generally recommended if you receive your Direct Debit payments directly from your clients and not from a billing service.

Read X – Out

The Read X-Out is a 'read-only' version of the Z-Out. It displays the same information as the Z-Out in the form of receipts from sales broken down by payment method and is a handy tool for 'tidying up' before you perform the actual Z-out and close the session. (Once the session has been closed off, you cannot go back and make any amendments).

Note that the X-Out does not let you enter in any session totals- it is provided purely for reporting purposes. It may be useful to print out any relevant reports here.

Aug fig. 2



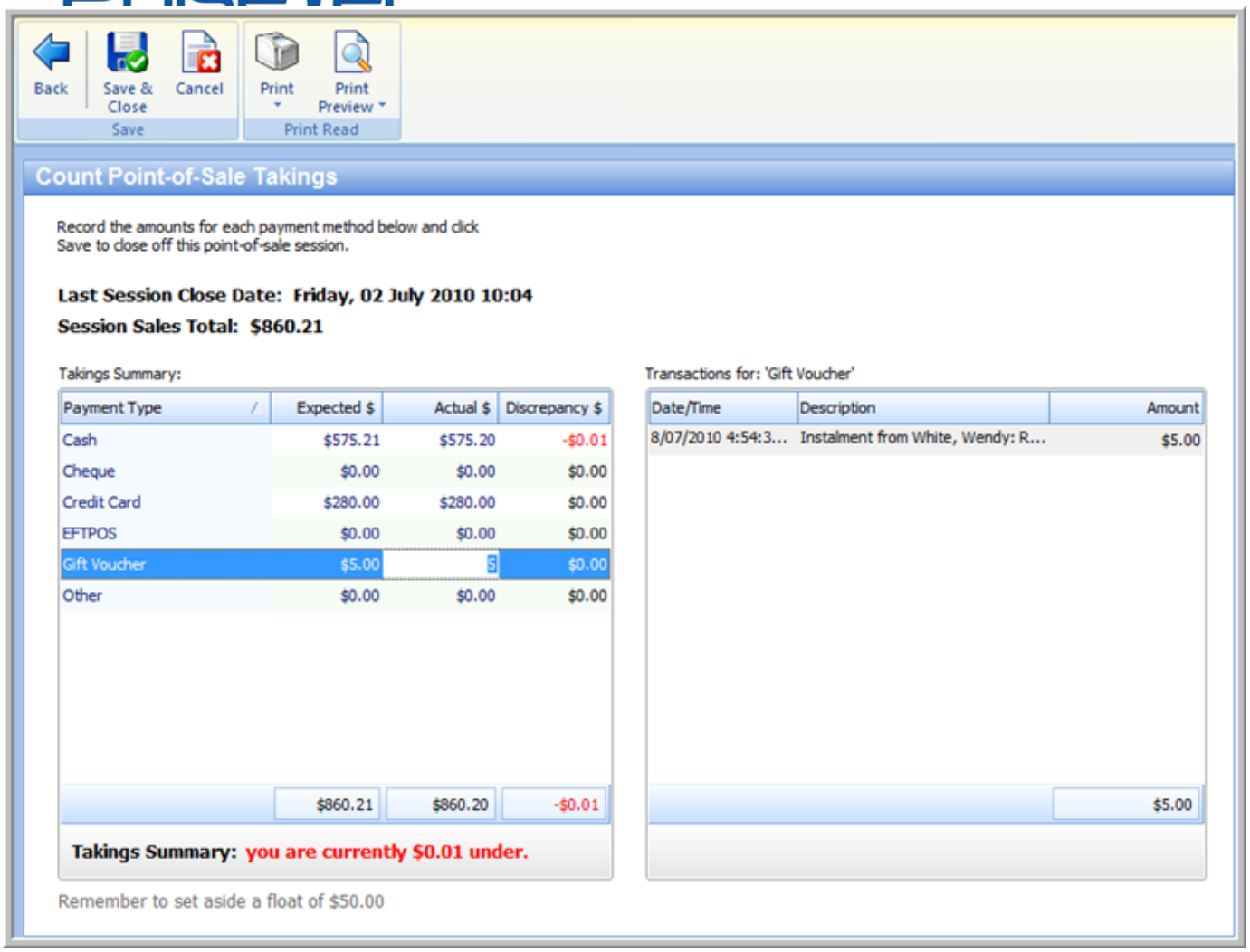
Read Z – Out

The Z-Out displays all receipts received since the last time a Point-of-Sale Session was closed. These receipts are broken down by payment type, giving you the opportunity to confirm that what you have received and is in your cash drawer balances with what ClientConnect has recorded as being received.

Step 1

To close a session, you first count the totals that have actually been received and enter these totals under the appropriate payment method, as shown below:

Aug fig. 3

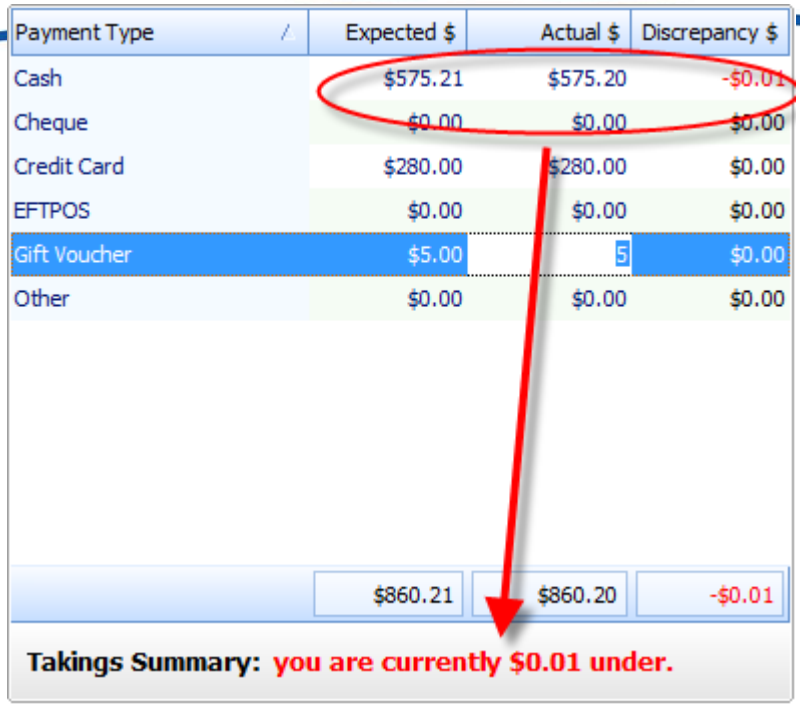


Step 2

ClientConnect displays the *Expected $* amount (calculated by totalling what has been recorded as being sold during this session), and provides a field for you to record the Actual $ amount (which is what you physically counted as being received in your cash drawer).

If there are any discrepancies between what was recorded as being received and what you counted, this will be displayed as an Under or Over amount:

Aug fig. 4



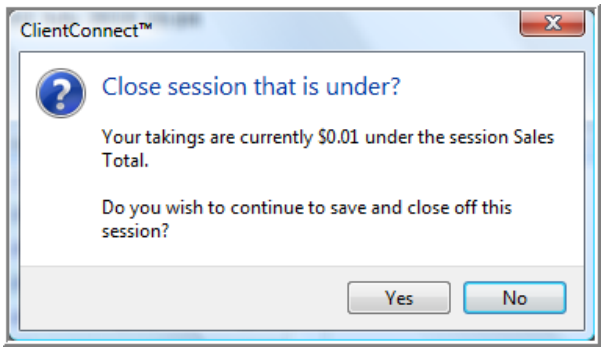
TIP: *Once you have performed your necessary checks and balances, and entered the totals, PRINT any reports that you wish to file on this Z-out as the Z process is irreversible.*

Step 3

You can then close the session off by clicking **Save & Close** on the toolbar. Once you have closed the session, you cannot make any further amendments.

You will be prompted to confirm this process if your session is over or under. Obviously, if your Z-outs are consistently not balancing, you would need to perform some further investigations regarding your POS procedures.

Aug fig. 5



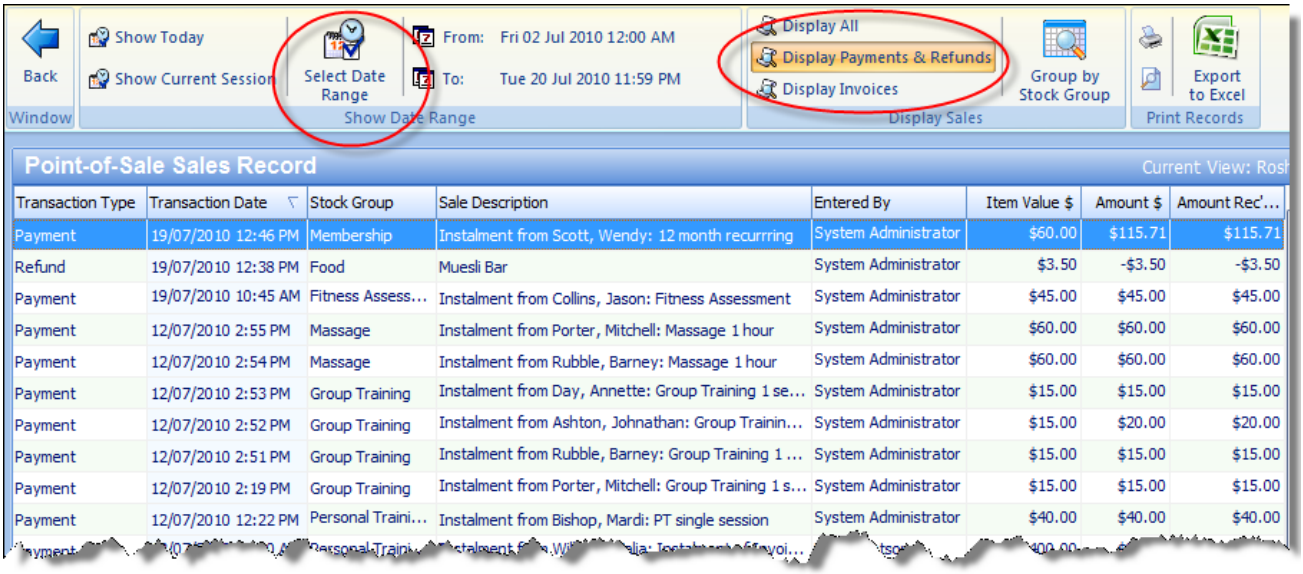
ClientConnect will then record these details under the Session History, and a new session starts (which means the values for each payment method are re-set back to zero- $0.00).

Show Sales

Show Sales provides a detailed listing of transactions made in ClientConnect over a given period of time.

The details displayed include the type of transaction, when it occurred, what it was for, the amount, etc.

Aug fig. 6



Transaction Type	Transaction Date	Stock Group	Sale Description	Entered By	Item Value $	Amount $	Amount Rec'...
Payment	19/07/2010 12:46 PM	Membership	Instalment from Scott, Wendy: 12 month recurrring	System Administrator	$60.00	$115.71	$115.71
Refund	19/07/2010 12:38 PM	Food	Muesli Bar	System Administrator	$3.50	-$3.50	-$3.50
Payment	19/07/2010 10:45 AM	Fitness Assess...	Instalment from Collins, Jason: Fitness Assessment	System Administrator	$45.00	$45.00	$45.00
Payment	12/07/2010 2:55 PM	Massage	Instalment from Porter, Mitchell: Massage 1 hour	System Administrator	$60.00	$60.00	$60.00
Payment	12/07/2010 2:54 PM	Massage	Instalment from Rubble, Barney: Massage 1 hour	System Administrator	$60.00	$60.00	$60.00
Payment	12/07/2010 2:53 PM	Group Training	Instalment from Day, Annette: Group Training 1 se...	System Administrator	$15.00	$15.00	$15.00
Payment	12/07/2010 2:52 PM	Group Training	Instalment from Ashton, Johnathan: Group Trainin...	System Administrator	$15.00	$20.00	$20.00
Payment	12/07/2010 2:51 PM	Group Training	Instalment from Rubble, Barney: Group Training 1 ...	System Administrator	$15.00	$15.00	$15.00
Payment	12/07/2010 2:19 PM	Group Training	Instalment from Porter, Mitchell: Group Training 1 s...	System Administrator	$15.00	$15.00	$15.00
Payment	12/07/2010 12:22 PM	Personal Traini...	Instalment from Bishop, Mardi: PT single session	System Administrator	$40.00	$40.00	$40.00

Changing the Displayed Transactions

You can change the transactions that are viewed on this screen by selecting the relevant option at the top of the screen. Views available are 'All Transactions', 'Payments and Refunds' and 'Invoices'.

Changing the Displayed Time Period

You can view the Sales for 'Today' (ie. Starting from today's business day), 'Current Session', which will display the sales since you last closed a session, or ' Select Date Range', which enables you to choose the relevant date range.

Changing any of these fields will automatically refresh the data displayed in the report.

Sessions History

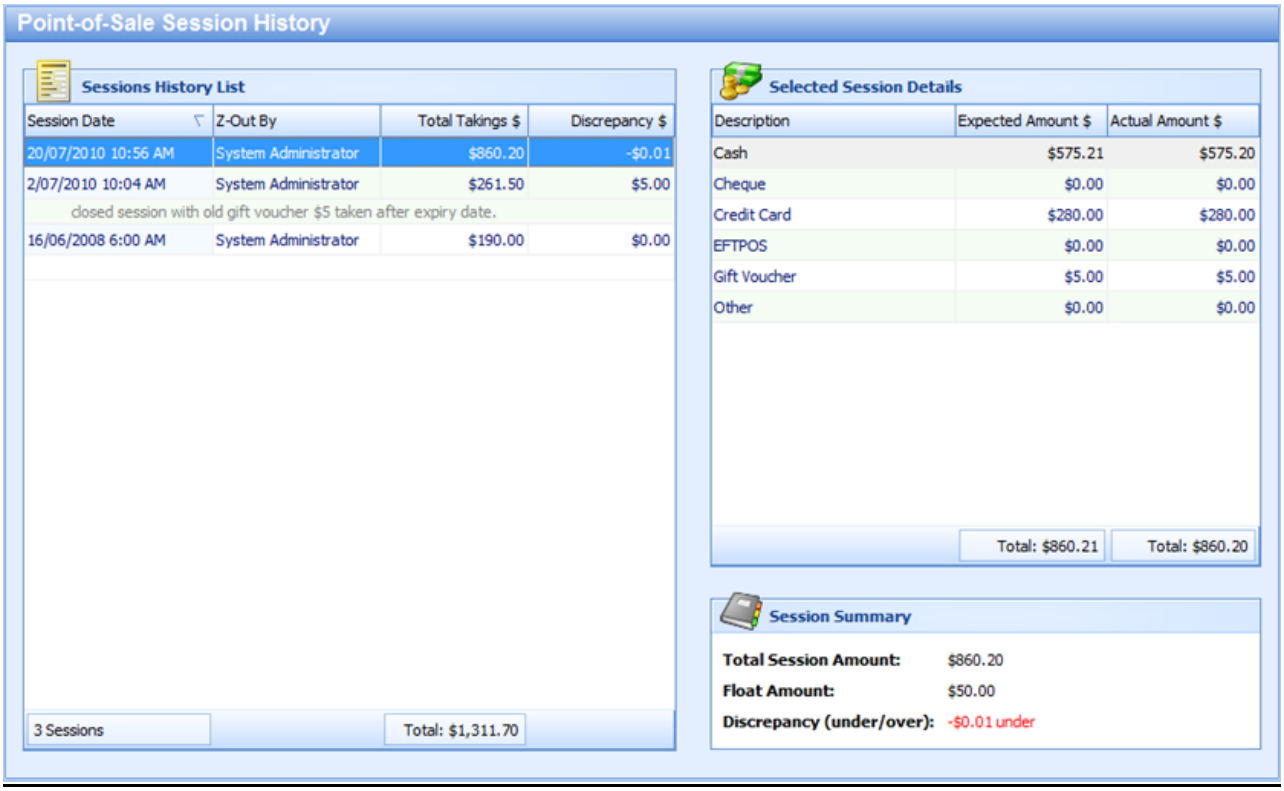
The Sessions History screen displays the list of all recorded Point-of-Sale Sessions that have been performed.

This is a convenient way of retroactively viewing and printing past sessions.

Not only are each session's totals records (such as Total Takings and Discrepancy - the amount you were under/over), but the summary information on the payment methods and their respective amounts are also displayed.

To view the details of payment methods and their amounts, simply select the session required in the **Sessions History List**, and the relevant details will automatically appear on the right-hand side of the screen, as shown below:

Aug fig. 7



BARCODE READER

Did you know that you can scan your stock items directly into POS?

The SKU codes you have set up in Stock Management can actually be used to identify your products for scanning directly into POS. No more typing! All you need to do is purchase a Barcode Reader, and you are away!

Prices for a basic Barcode Reader start at $225 including GST and the Reader comes with its own stand. Please contact us at sales@pulsetecsolutions.com or call on 03-9878-7813 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.