The Pulse – Issue 26 October '10

Hello CC'ers!!

Ahhhh…..Spring is definitely in the air! Flowers are bloomimg, the air is warmer, day light saving has arrived and last but not least, my gym is packed every night!!!! It seems everyone has come out of the wood work to get themselves ready for those summer months ahead. If there are any more we'll be lining up for the treadmills! It's great to see the couch is not winning anymore……

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 or check out our support website http://support.pulsetecsolutions.com for handy hints and instruction sheets.

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 25

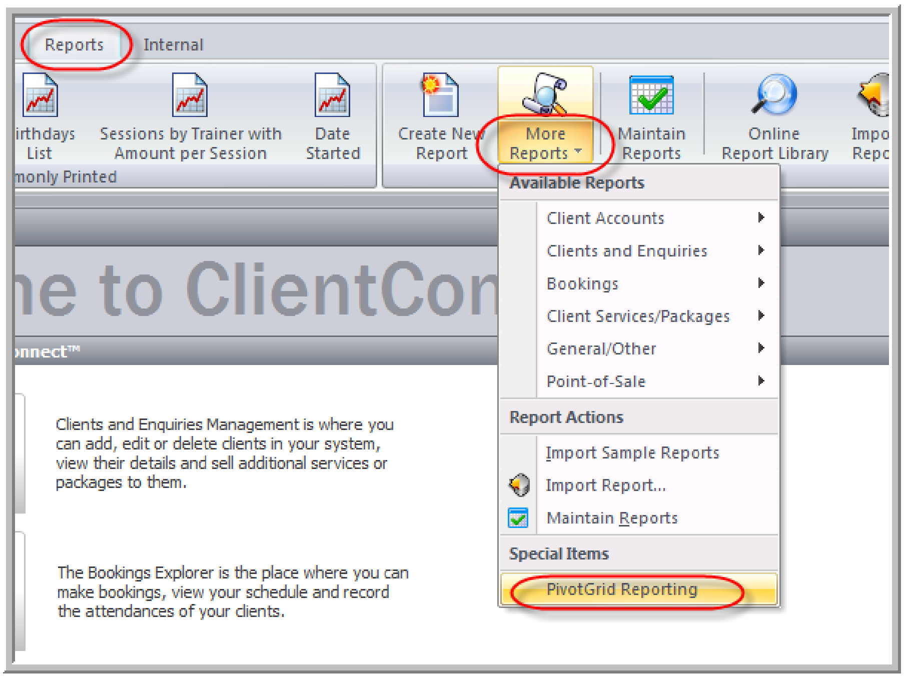
Pivot Grid Reporting – build your own reports

Pivot Grids are tables which allow you to look at data in several dimensions, such as classes by trainer by date. They drill down into the data and summarise the information to be reported. They can be changed easily to show different information and give a good visual representation of the data.

Access Method

To access the **Pivot Grid** in ClientConnect, click on the **'Reports'** tab, then **'More Reports'** and then **'Pivot Grid Reporting'**.

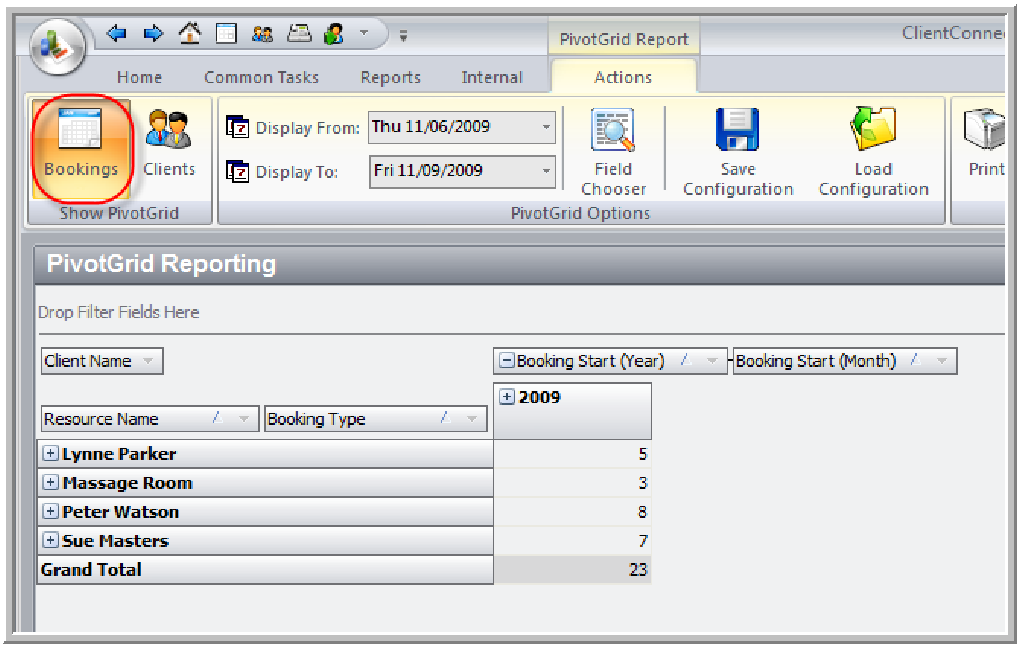
Oct fig 1



When you first open the **Pivot Grid**, it will look something like this. As you can see (circled) you can select to see **Booking** or **Client** information. We'll start with the **Bookings Pivot Grid. (Clients grid detailed below).**

Bookings Pivot Table

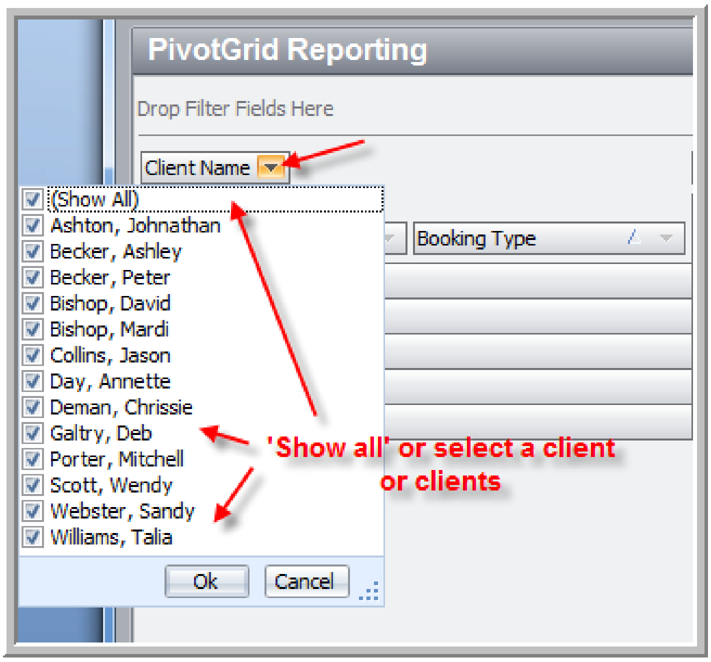
Oct fig 2



Booking information gives you a breakdown of each resource you select, each booking type and any other available data you wish to show.

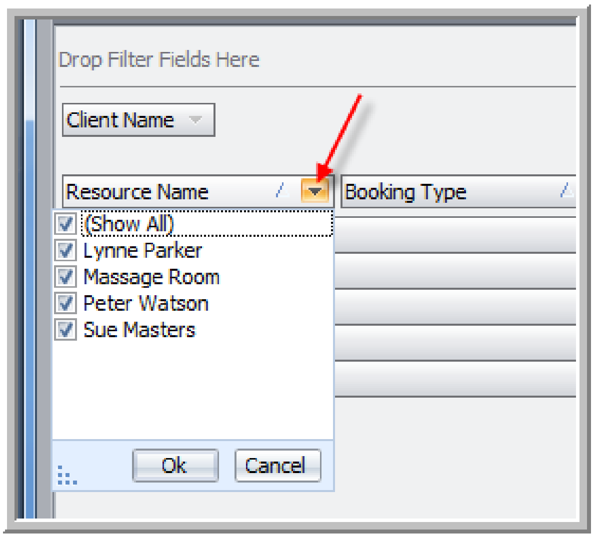
If you click on **'Client Name'**, you can select which client/clients you wish to see.

Oct fig 3



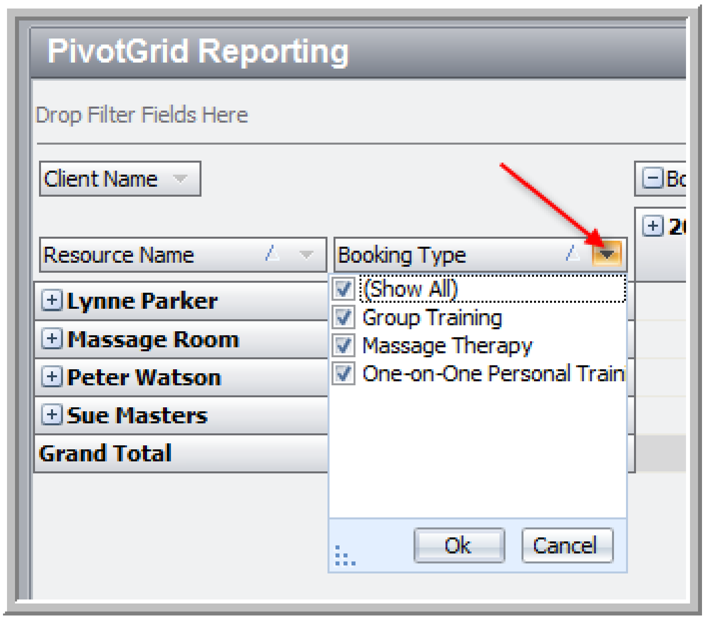
I can then select which **Resource** or **Resources** for the report.

Oct fig 4



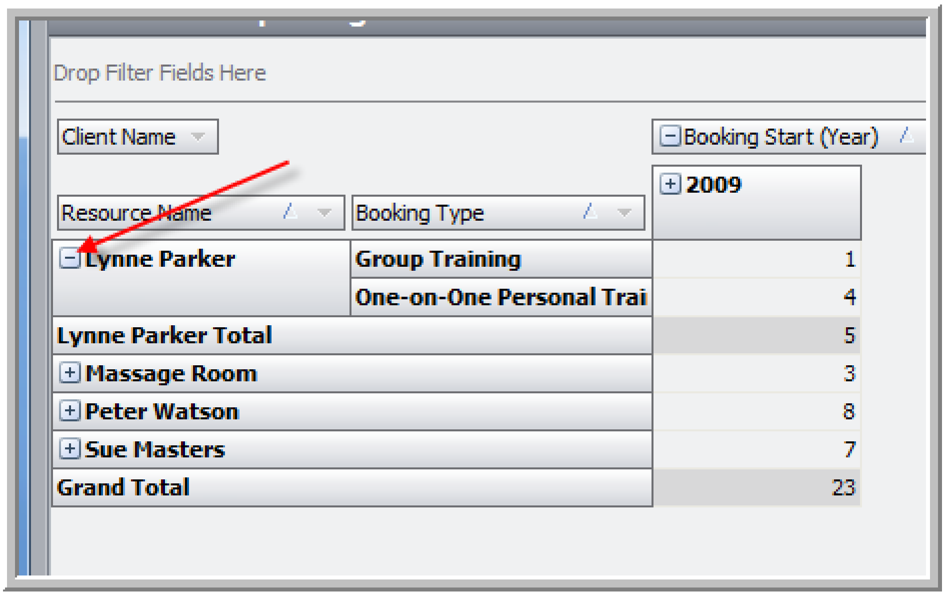
Then select the **booking types** for the report.

Oct fig 5



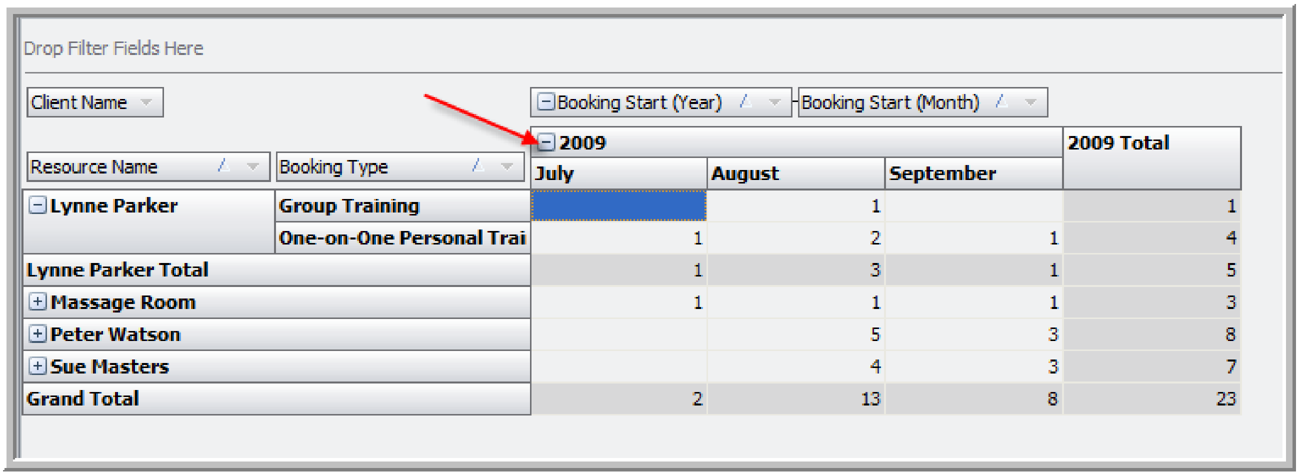
If I now click on the **'plus'** sign next to a **Resource**, it expands out the information to show you the **booking types**.

Oct fig 6



I can then expand out the year to give me the breakdown in months.

Oct fig 7

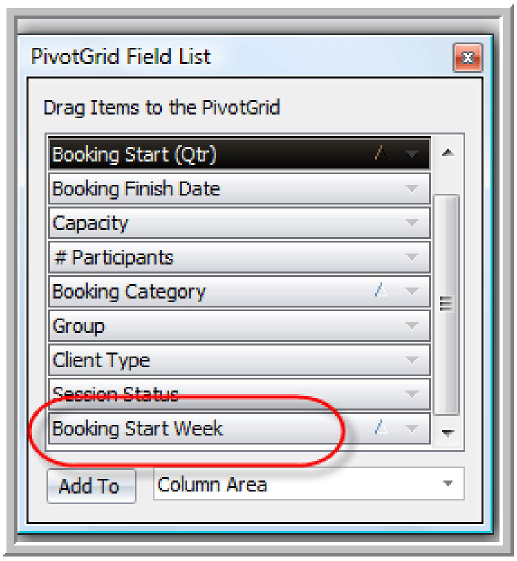


Resource Name	Booking Type	2009 July	August	September	2009 Total
Lynne Parker	Group Training		1		1
	One-on-One Personal Trai	1	2	1	4
Lynne Parker Total		1	3	1	5
Massage Room		1	1	1	3
Peter Watson			5	3	8
Sue Masters			4	3	7
Grand Total		2	13	8	23

I then look at my information and think, ok, I still want it broken down further.

I click on the **'Field Chooser'** button on the top of the screen to bring up the **'Pivot Grid Field List'** and select **'Booking Start Week'**.

Oct fig 8



I can then drag it up and drop it into the filter area. You will then notice that the months now also have 'plus' signs on them.

Oct fig 9

	Booking Start (Year) / Booking Start (Month) / Booking Start Week			
	2009			2009 Total
	July	August	September	
		1		1
l Trai	1	2	1	4
	1	3	1	5

Expand them out into weeks.

Oct fig 10

Drop Filter Fields Here

Client Name

Resource Name	Booking Type	2009 July 5	August 1	August 2	August 3	August 4	August Total	September 1	September 2	September Total	2009 Total
Lynne Parker	Group Training			1			1				
	One-on-One Personal Trai	1				2	2	1		1	
Lynne Parker Total		1		1		2	3	1		1	
Massage Room		1		1			1	1		1	
Peter Watson			1	1	2	1	5	1	2	3	
Sue Masters			1		1	2	4	2	1	3	
Grand Total		2	2	3	3	5	13	5	3	8	

I now look at the data and think, ok, I'm getting how many bookings and clients there were but **how** were they attended? I can use my **'Field Chooser'** again to drag and drop the **'Session Status'** into the filters. The table is now broken down into **'Session Status'** as well.

Oct fig 11

Drop Filter Fields Here

Client Name

Resource Name	Booking Type	Session Statu	2009 July 5	August 1	August 2
Lynne Parker	Group Training				
	One-on-One Personal Training		1		
Lynne Parker Total			1		
Massage Room	Massage Therapy		1		
	One-on-One Personal Training				
Massage Room Total			1		
Peter Watson	Group Training				
	Massage Therapy				
	One-on-One Personal Training			1	
Peter Watson Total				1	
Sue Masters	Group Training				

If I then expand out each **booking type**, it will show me how each booking was completed.

Oct fig 12

Drop Filter Fields Here

Client Name

Resource Name	Booking Type	Session Statu	2009 July 5	2009 August 1	2009 August 2	2009 August 3	2009 August 4	August Total	S… 1
Lynne Parker	Group Training	Attended			1			1	
	One-on-One Personal T	Attended	1				1	1	
		Late Cancel					1	1	
	One-on-One Personal Training Total		1				2	2	
Lynne Parker Total			1		1		2	3	
Massage Room	Massage Therapy		1						
	One-on-One Personal Training				1			1	
Massage Room Total			1		1			1	

This shows me that Lynne Parker had 1 group training session which was attended, 2 one on one PT sessions, one was attended and one was a late cancel.

If I add '# Participants' into the filter, this will show me slightly different information. You can see in the screen shot below that a client was entered into a booking but was then a 'no-show'. Under 'client name' the count is 1 because that client was added to the booking but under '# participants' the count is 0 as the client was marked as a no-show.

Oct fig 12a

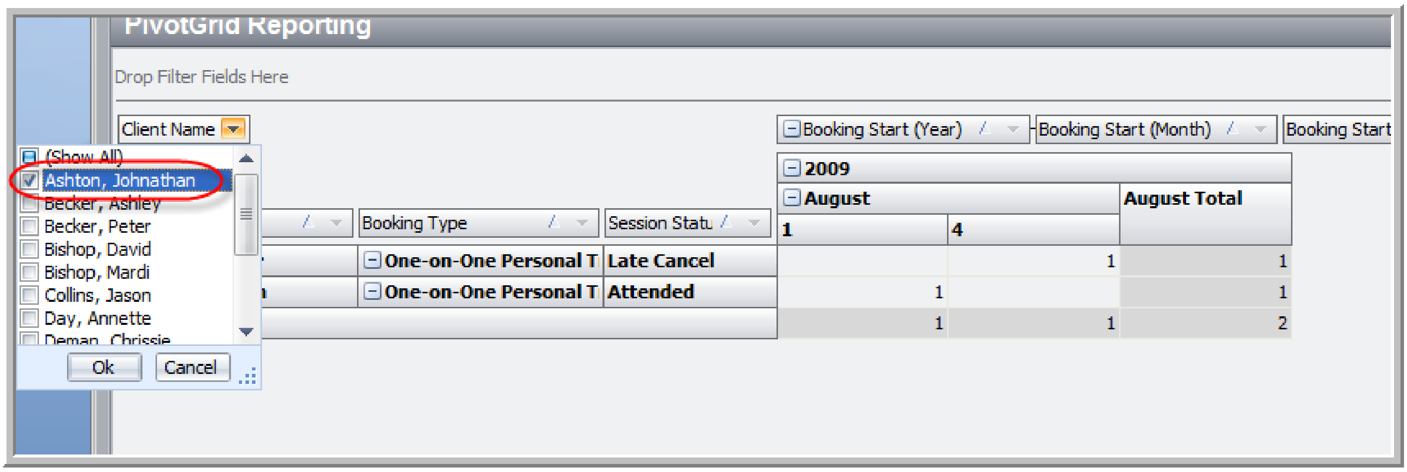
Drop Filter Fields Here

Client Name | # Participants

Resource Name	Session Statu	Booking Type	2009 August Client Name	2009 August # Participants	2009 September Client Name	2009 September # Participants	2009 Total Client Name	2009 Total # Participants
Lynne Parker	Attended	One-on-One Personal Training	1	1	1	1	2	2
		Group Training	1	1			1	1
	Attended Total		2	2	1	1	3	3
	Late Cancel	One-on-One Personal Training	1	0			1	0
Lynne Parker Total			3	2	1	1	4	3
Massage Room			1	0	1	0	2	0
Peter Watson	Attended	One-on-One Personal Training	1	1			1	1
		Massage Therapy	1	1			1	1
		Group Training	2	2	2	2	4	4
	Attended Total		4	4	2	2	6	6
	Late Cancel	One-on-One Personal Training			1	0	1	0
	No-Show	Group Training	1	0	1	0	2	0
Peter Watson Total			5	4	4	2	9	6
Sue Masters			4	2	6	8	10	10
Grand Total			13	8	12	11	25	19

I can also simply select to show information on a **single** client.

Oct fig 13



Once you have decided on the **configuration** you wish to report on, you can then save it by clicking on the **'Save Configuration'** button. Next time you want to pull up this Pivot Table, simply **'Load Configuration'** again.

You will notice in the buttons on the top of the screen, you can also select the date range for the report. You can be as specific or wide ranging as you like.

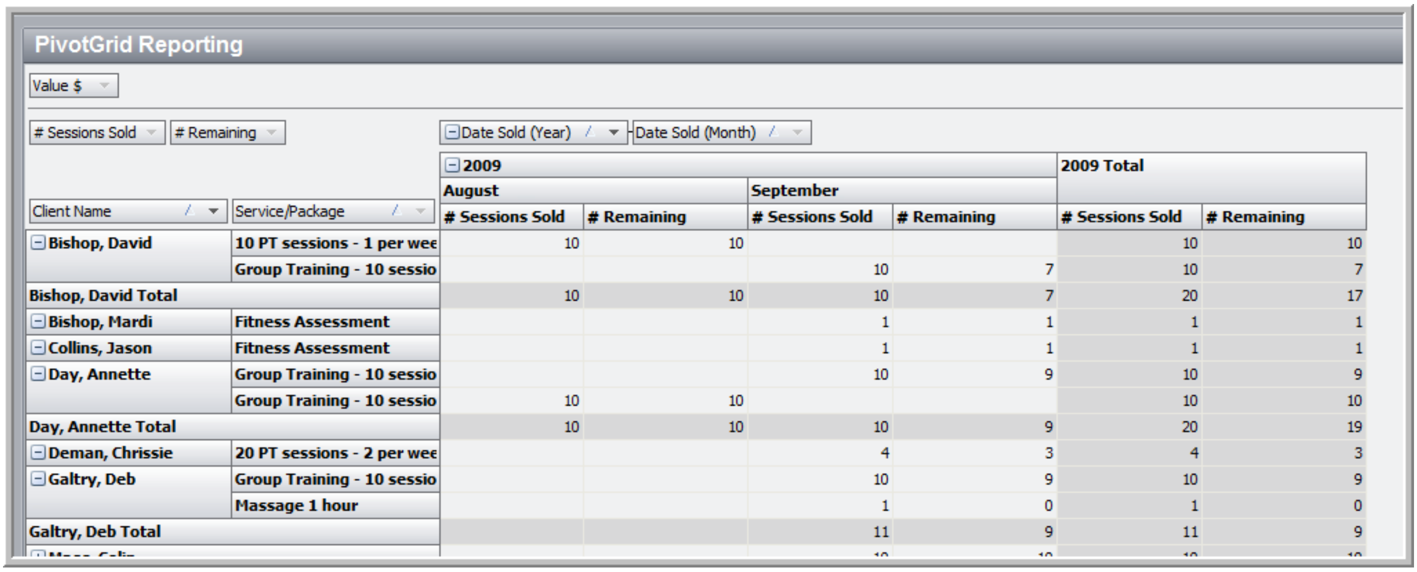
Clients Pivot Table

I will now swap to the **Clients Pivot Table**.

Oct fig 14

This shows each client and the package they bought, broken down by month and shows sessions used and sessions remaining.

Oct fig 15



PivotGrid Reporting

Value $

Client Name	Service/Package	2009 August # Sessions Sold	2009 August # Remaining	2009 September # Sessions Sold	2009 September # Remaining	2009 Total # Sessions Sold	2009 Total # Remaining
Bishop, David	10 PT sessions - 1 per wee	10	10			10	10
	Group Training - 10 sessio			10	7	10	7
Bishop, David Total		10	10	10	7	20	17
Bishop, Mardi	Fitness Assessment			1	1	1	1
Collins, Jason	Fitness Assessment			1	1	1	1
Day, Annette	Group Training - 10 sessio			10	9	10	9
	Group Training - 10 sessio	10	10			10	10
Day, Annette Total		10	10	10	9	20	19
Deman, Chrissie	20 PT sessions - 2 per wee			4	3	4	3
Galtry, Deb	Group Training - 10 sessio			10	9	10	9
	Massage 1 hour			1	0	1	0
Galtry, Deb Total				11	9	11	9

Again, on this table as in the Booking Pivot Table, you can select which client/s, which package/s, the year and month for the report.

Both Pivot tables are really useful so spend some time having a look at them, swap things around, and see what information best suits your needs.

Remember that you can create multiple configurations and save them too.

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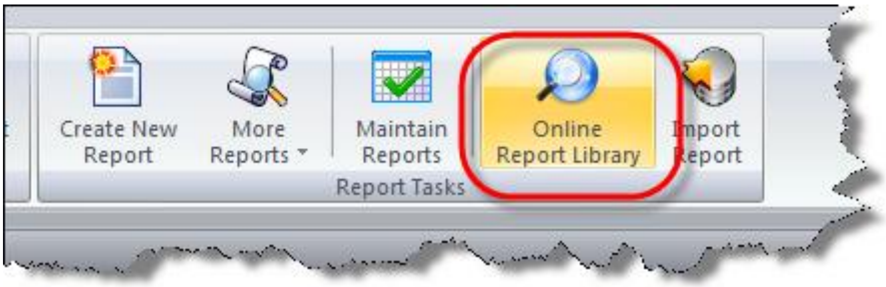
What's In the Online Report Library?

Did you know there are many additional reports in the Online Reports Library available for you to download for free? These reports are for commonly requested items and are based on Bookings, Client Accounts, Clients and Enquiries, Point-of-Sale and Services & Packages. Chances are there are some that will be useful to you!

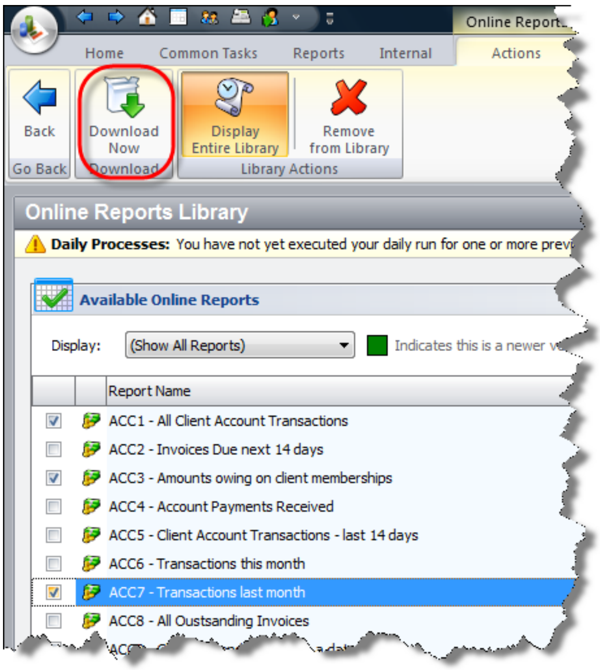
To access these, go to the **'Reports'** tab, click on the **'Online Reports Library'** button.

Oct fig 16



The library lists any reports that you don't already have in ClientConnect. You can display them ALL if you like too. Select the reports you wish to download and click **'Download now'**.

Oct fig 17



The report(s) will be listed under the **'More reports'** tab.

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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.

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RELEASE NEWS

Version 3 Users

Please contact us ASAP. We are no longer doing any enhancements to V3.5. There are some processes that will need to be completed in order for you to upgrade to Version 4.2

Version 4 users

The official roll-out of our brand new release V4.2 is imminent! This new release contains some exciting new and enhanced features, so stay tuned for that announcement.