

## The Pulse – Issue 27

November '10

Hello CC'ers!!

About 3 weeks ago I signed up for Boot Camp - 2 midweek sessions at 6am and a Saturday session at 8am – for 4 weeks. Well, I have decided once and for all that I AM NOT A MORNING PERSON!!!! Those 5.30am starts (the ones I actually did get out of bed for) are just not right! How you guys do it day after day after day has got me gobsmacked. So, please take a bow.....but let **me** sleep in!!!!

### Reminders

PLEASE send any correspondence to [support@pulsetecsolutions.com](mailto: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.

## Handy Hint Number 26

### Forward Date Invoices

There is a handy new feature in ClientConnect that allows you to forward date client Invoices – just in time for Christmas! (This feature was introduced in V4.1.0.38, so check that you are currently running V38 or higher).

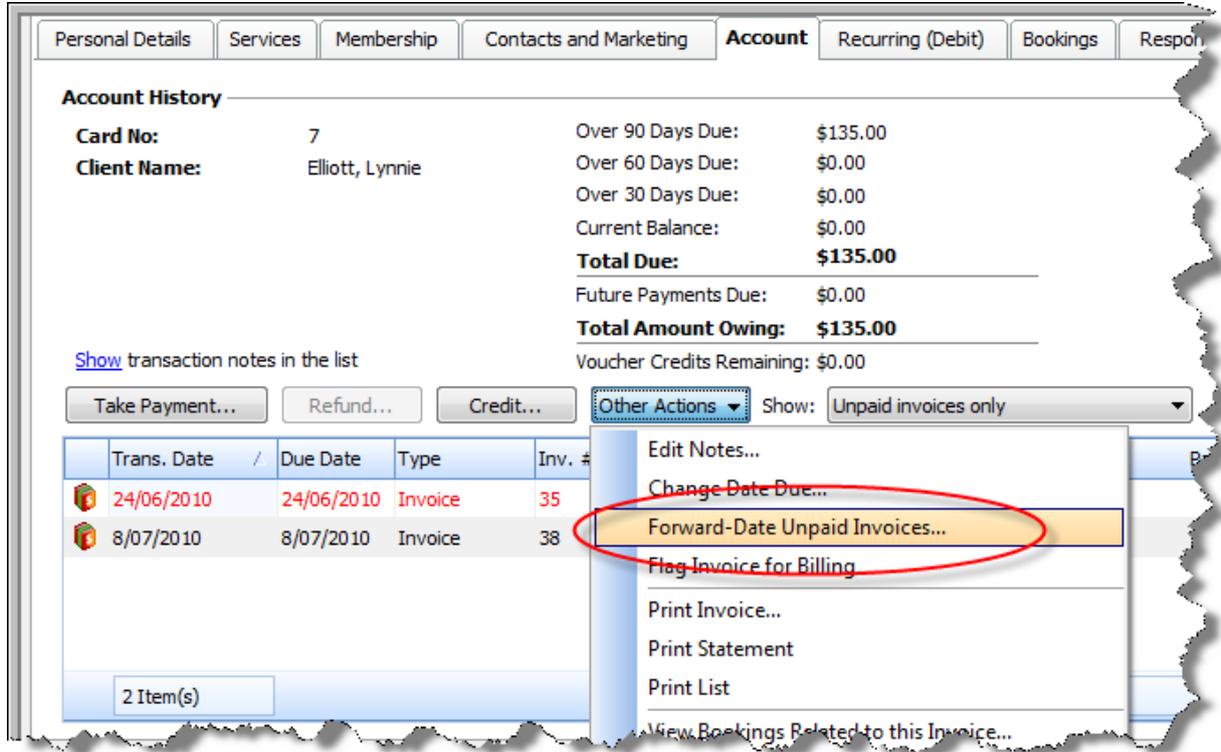
This is a really useful feature if you have a Client that is going on Leave for a period, or if your Gym/Studio is going to be closed for any length of time.

You can either Forward Date invoices for a particular Client or Forward Date *all* unpaid invoices in the system.

#### Forward Date Invoices for a Client

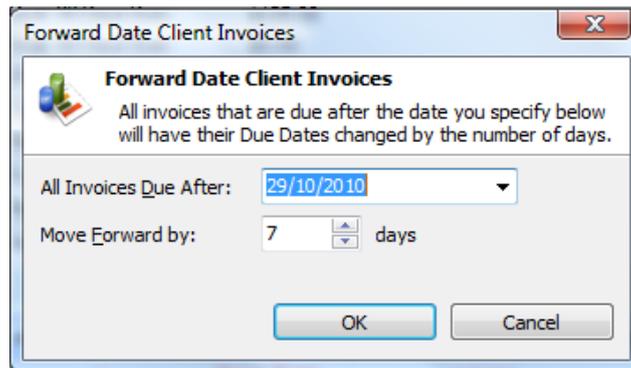
To Forward Date invoices for a particular client, go to the Client's Account tab and select the relevant invoice. You can then select 'Other Actions' > 'Forward Date Unpaid Invoices'.

Nov fig 1.



The following screen will then appear.

Nov fig 2.



All invoices for that Client that fall due after the chosen date will be moved forward by the number of days that you select here.

*Forward Date an Instalment Invoice for a Client*

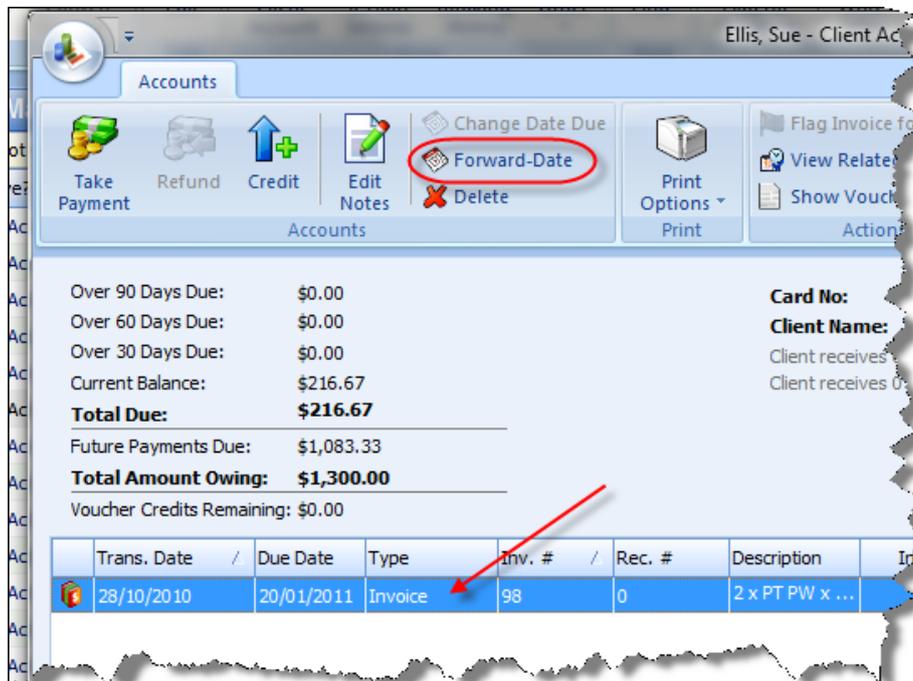
If the Client has an Invoice that is made up of several instalment invoices, the Forward Date works in a similar way.

Nov fig 3.

<b>Client Name:</b>	Ellis, Sue			
<b>Service Name:</b>	2 x PT PW x 13 wks - f/n inst			
<b>Recurrence Frequency:</b>	Fortnightly			
Trans. Date	Due Date	/	Charge #	Description
28/10/2010	28/10/2010		98-1	Instalment
28/10/2010	11/11/2010		98-2	Instalment
28/10/2010	25/11/2010		98-3	Instalment
28/10/2010	09/12/2010		98-4	Instalment
28/10/2010	23/12/2010		98-5	Instalment
28/10/2010	06/01/2011		98-6	Instalment

In the client's account screen, go to the main invoice and select 'Forward Date'.

Nov fig 4.



Ellis, Sue - Client Ac

Accounts

Take Payment   Refund   Credit   Edit Notes   **Forward-Date**   Change Date Due   Delete   Print Options   Flag Invoice for   View Related   Show Voucher   Action

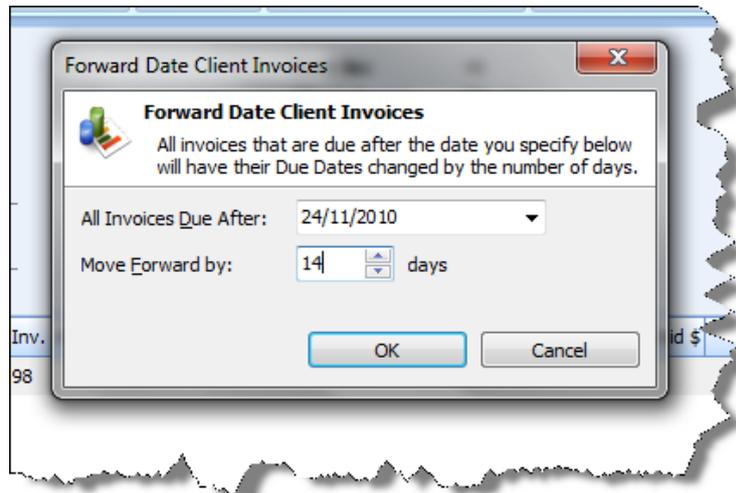
Over 90 Days Due: \$0.00  
 Over 60 Days Due: \$0.00  
 Over 30 Days Due: \$0.00  
 Current Balance: \$216.67  
**Total Due: \$216.67**  
 Future Payments Due: \$1,083.33  
**Total Amount Owing: \$1,300.00**  
 Voucher Credits Remaining: \$0.00

Card No:  
 Client Name:  
 Client receives  
 Client receives 0

Trans. Date	Due Date	Type	Inv. #	Rec. #	Description
28/10/2010	20/01/2011	Invoice	98	0	2 x PT PW x ...

You can then specify from when you want the instalments to be forward dated. For example, all instalments (invoices) after the 24/11 to be forward dated by 14 days.

Nov fig 5.



If you then view the instalments, those that were due on or after 24/11 have now been forward dated by 14 days.

Nov fig 6.

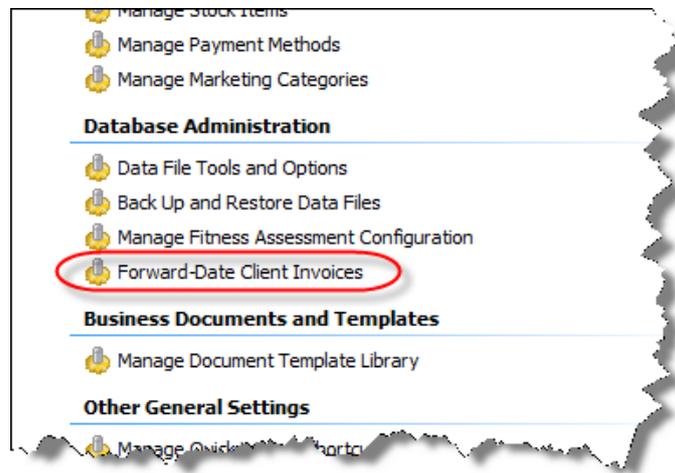
<b>Client Name:</b> Ellis, Sue			
<b>Service Name:</b> 2 x PT PW x 13 wks - f/n inst			
<b>Recurrence Frequency:</b> Fortnightly			
Trans. Date	Due Date	Charge #	Description
28/10/2010	28/10/2010	98-1	Instalment of Invoice #: 98
28/10/2010	11/11/2010	98-2	Instalment of Invoice #: 98
28/10/2010	09/12/2010	98-3	Instalment of Invoice #: 98
28/10/2010	23/12/2010	98-4	Instalment of Invoice #: 98
28/10/2010	06/01/2011	98-5	Instalment of Invoice #: 98
28/10/2010	20/01/2011	98-6	Instalment of Invoice #: 98

*Forward Date ALL Invoices in the System*

There is also an option to Forward Date all (unpaid) Invoices in the system, which is really useful if the Studio/Gym is closing down for a period of time, eg. Christmas Holidays and you want to allow all of your Clients an extra amount of time to pay their invoices.

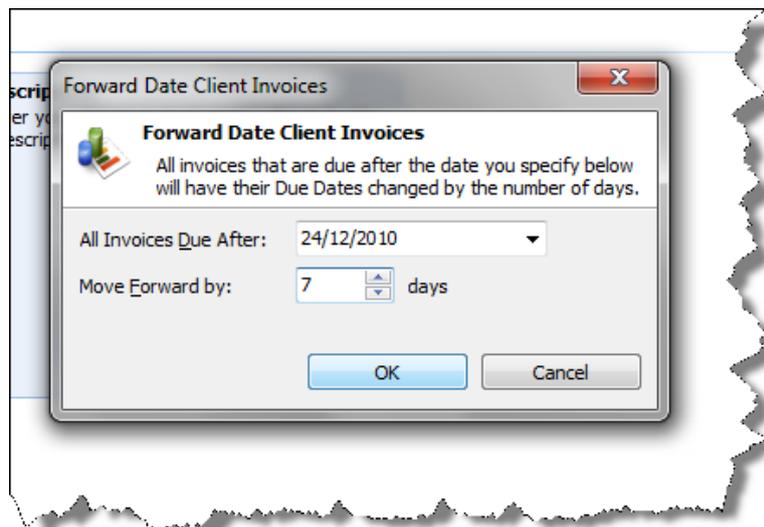
Go to Application menu > Control Panel > Forward Date Client Invoices.

Nov fig 7.



This function moves the Due Dates for any Termed Membership and Package Invoices forward by however many days you specify.

Nov fig 8.

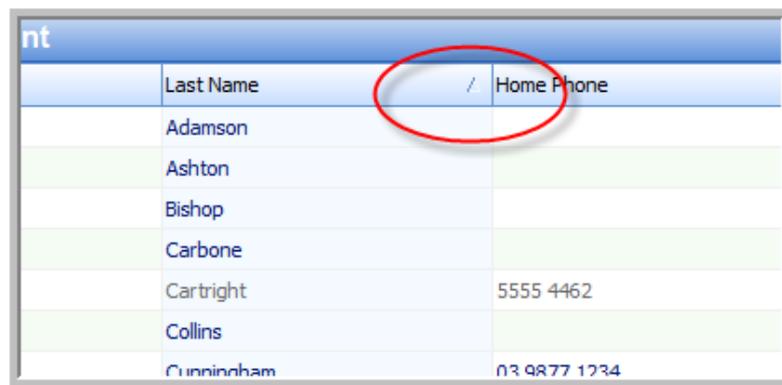


## Did you know you can Customise Views in ClientConnect?

ClientConnect has some sophisticated features built in that allow you to customise how you view information in the system.

If you click on a Column Heading on a data screen, you can change the sort order of the information that is displayed. For example in Clients & Enquiries, if you click on the 'Last Name' column heading, the data will be sorted by Last Name – ascending. If you click this heading again, the data will be sorted by Last Name – descending.

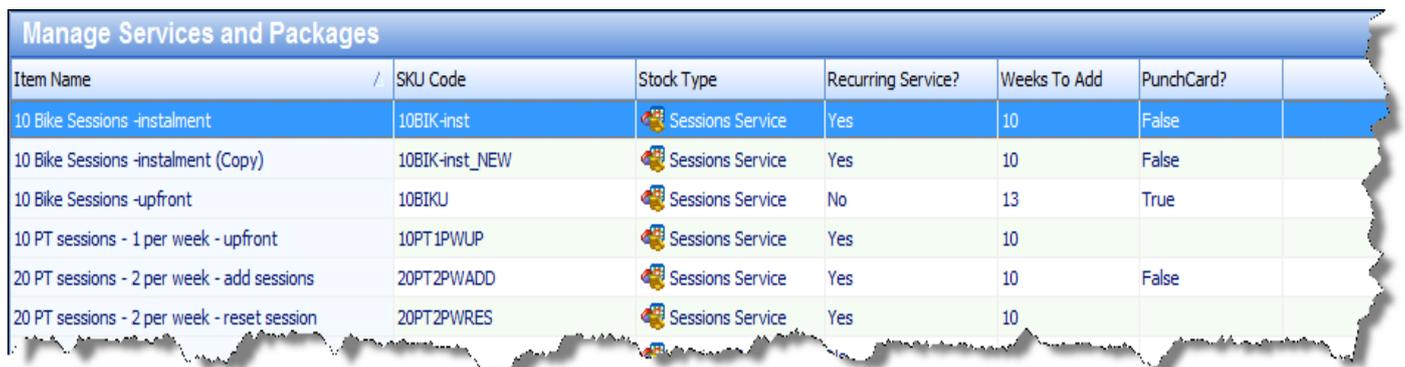
Nov fig 9.



nt	
Last Name	Home Phone
Adamson	
Ashton	
Bishop	
Carbone	
Cartright	5555 4462
Collins	
Cunningham	03 9877 1234

This functionality is available in many places around ClientConnect, including the Control Panel maintenance area.

Nov fig 10.



Item Name	SKU Code	Stock Type	Recurring Service?	Weeks To Add	PunchCard?
10 Bike Sessions -instalment	10BIK-inst	Sessions Service	Yes	10	False
10 Bike Sessions -instalment (Copy)	10BIK-inst_NEW	Sessions Service	Yes	10	False
10 Bike Sessions -upfront	10BIKU	Sessions Service	No	13	True
10 PT sessions - 1 per week - upfront	10PT1PWUP	Sessions Service	Yes	10	
20 PT sessions - 2 per week - add sessions	20PT2PWADD	Sessions Service	Yes	10	False
20 PT sessions - 2 per week - reset session	20PT2PWRES	Sessions Service	Yes	10	

You can also use these Column Headings to filter the information that is displayed. Click on the arrow on the right hand side of the Column Heading to view the available filters for that column.

Nov fig 11.



You can then select the relevant filter, and only that data will be displayed.

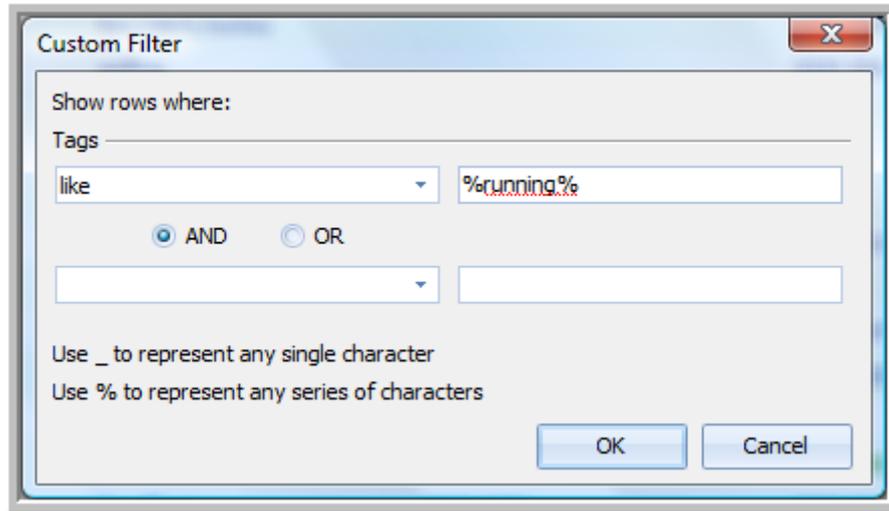
Alternatively, you can create your own filter, for example if you wanted to select a particular group of clients for a marketing promotion using a mail merge, eg. all your 'Runners'.

Nov fig 12.

Last Name	Tags	Membership Type
Johnson	skiing,running	
Williams	skiing,running	M'ship 12 mnth recur
Jones	skiing,netball	
Jones	running,golfing	
Collins	running	FN DD
Parker	netball	m'ship 3 mth upfront
Scott	netball	M'ship 12 mnth recur
Cartright	Key Client,skiing	M'ship 12 mnth recur
Miller	Kev Client.marathons	FN DD

To do this, you would click on the 'arrow' to get the list of available filters, then click on 'Custom'. The following box will then appear.

Nov fig 13.



In this example, we want to select any Clients that have been tagged as runners, so you would enter the Custom filter as above – ‘like’ and ‘%running%’.

The ‘%’ sign is used to filter out other data so that the query only looks at the text ‘running’.

The results of the filter would appear as below – a list of Clients that have been tagged as Runners.

You can then use this view to create a Mail Merge for promotions.

Nov fig 14.

me	Tags	Membership Type
	skiing,running	
	skiing,running	M'ship 12 mnth re
	running,golfing	
	running	FN DD
	Key Client,hockey,running	3-mth plus asses
	hockey,running	

This functionality may be very useful to you for filtering out certain information from your system. Please contact [support@pulsetecsolutions.com](mailto:support@pulsetecsolutions.com) if you would like more assistance with this.



Club and PT Management Software

## 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](http://www.pulsetecsolutions.com) for more details.

## 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.

### Version 4 users

V4.2 is currently on release to our beta test sites! We anticipate that this will be available on general release in the near future.