

The Pulse – Issue 35

July '11

Hello CC'ers!!

Well I know where I want to be right now.....in Bermuda with my 15 year old daughter!!!!!! Sun, sand, surf....does it get any better than that? Here I am looking out of my rain splashed window at a dull, cold day and all I'll have to show for it is a T-shirt that says "I went to Bermuda but my mum was stuck in Melbourne!". Brrrrrr.....!!!!

Reminders

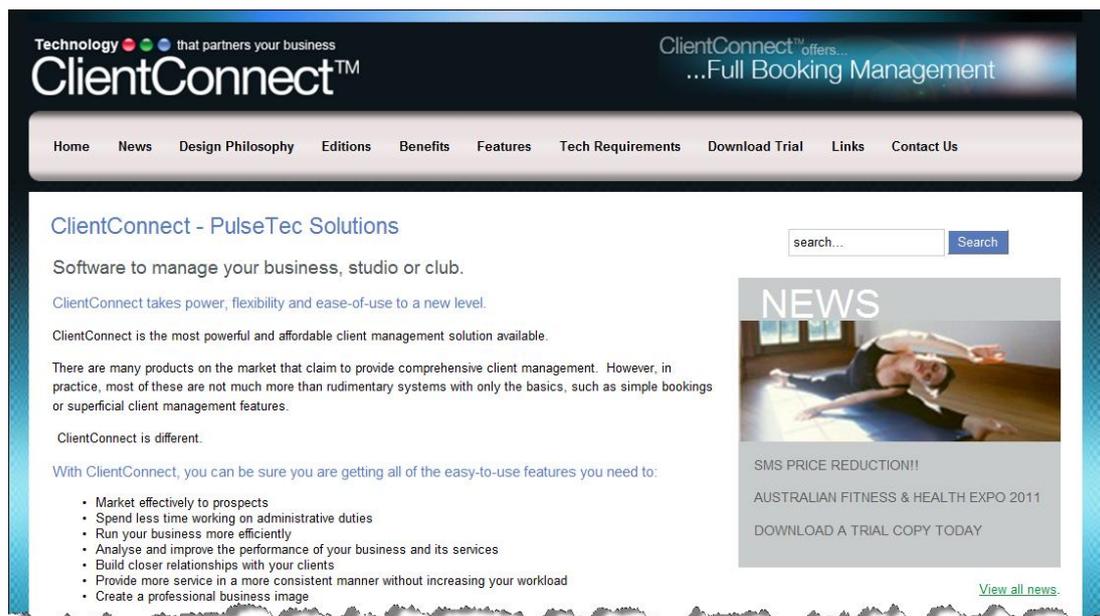
As usual, please send **ALL** correspondence to support@pulsetecsolutions.com NOT to our personal emails because if we are away, you may not be answered and we don't want that to happen. You can also phone us directly on +61 (0)3 9878 7813 or check out our support website <http://support.pulsetecsolutions.com> for handy hints, instruction sheets and archived newsletters.

New Website for ClientConnect

ClientConnect has its own new website! Visit www.ClientConnectSoftware.com.au to read about the latest news and features of ClientConnect.

As always, there's a link to download a free trial version of the software, so be sure to tell your friends about our exciting new site!

July fig 1.



The screenshot shows the ClientConnect website homepage. At the top, it features the tagline "Technology that partners your business" and the ClientConnect logo. A navigation menu includes links for Home, News, Design Philosophy, Editions, Benefits, Features, Tech Requirements, Download Trial, Links, and Contact Us. The main content area is titled "ClientConnect - PulseTec Solutions" and describes the software as a powerful and affordable client management solution. It lists several benefits, such as marketing effectively, saving time on administrative duties, and building closer relationships with clients. A search bar is located in the top right corner. On the right side, there is a "NEWS" section with a photo of a person stretching and a list of news items: "SMS PRICE REDUCTION!!", "AUSTRALIAN FITNESS & HEALTH EXPO 2011", and "DOWNLOAD A TRIAL COPY TODAY". A "View all news" link is provided at the bottom right of the news section.

Handy Hint Number 35

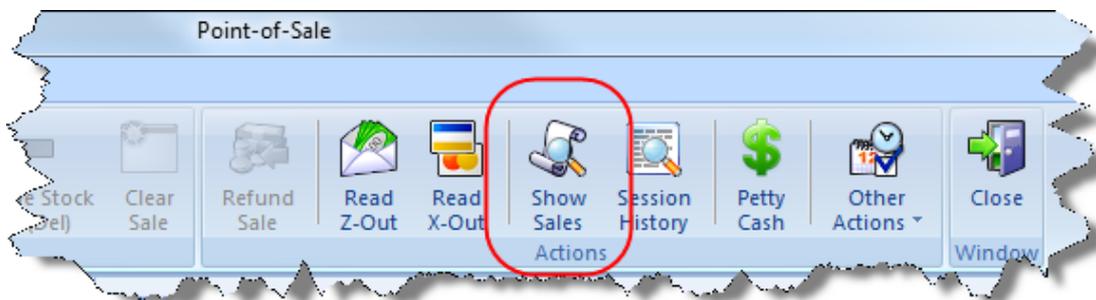


End of Year Reports

Did you know that you can get a Sales report from ClientConnect for the last financial year? This report can be grouped by each of your Stock Groups to show you how much of each group was sold. (This can be broken down even further to show exactly how many of each item was sold).

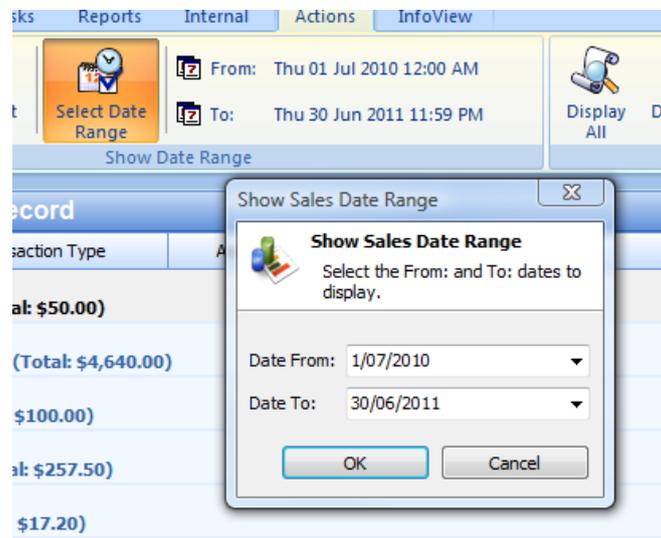
To see this information, go to the Point of Sale area, and click on 'Show Sales'.

July fig2.



Click on 'Select Date Range', and enter the required dates.

July fig3.



A list of all of the transactions in the date range will then appear.

July fig 4.

Point-of-Sale Sales Record								Current View: General Sales H
Transaction Date	Transaction Type	Amount \$	Sale Description	Item Value \$	Entered By	Amount Rec'...	Stock Group	
30/06/2011 2:21 PM	Payment	\$2.80	Instalment from Bloggs, Joe: Point-of-Sale (931...	\$2.80	System Administr...	\$2.80	Drinks	
30/06/2011 2:21 PM	Payment	\$60.00	Instalment from Beck, Rachel: Point-of-Sale (FIT...		System Administr...	\$60.00		
30/06/2011 2:21 PM	Invoice	\$2.80	Gatorade	\$2.80	System Administr...		Drinks	
30/06/2011 2:21 PM	Invoice	\$10.00	Branded Sweat Towel	\$10.00	System Administr...		Clothing	
30/06/2011 2:21 PM	Invoice	\$50.00	Fit Ball	\$50.00	System Administr...		Equipment	
30/06/2011 2:09 PM	Payment	\$80.00	Instalment from Bloggs, Joe: Instalment of Invoi...	\$400.00	System Administr...	\$80.00	Personal Trai	
30/06/2011 2:09 PM	Payment	\$30.00	Instalment from Beck, Rachel: Recurring Payme...	\$30.00	System Administr...	\$30.00	Membership	
30/06/2011 12:21 ...	Payment	\$80.00	Instalment from Bloggs, Joe: Instalment of Invoi...	\$400.00	System Administr...	\$80.00	Personal Trai	
30/06/2011 12:21 ...	Payment	\$30.00	Instalment from Bloggs, Joe: Recurring Payment...	\$30.00	System Administr...	\$30.00	Membership	
30/06/2011 12:21 ...	Payment	\$30.00	Instalment from Beck, Rachel: Recurring Payme...	\$30.00	System Administr...	\$30.00	Membership	
30/06/2011 12:21 ...	Payment	\$30.00	Instalment from Beck, Rachel: Recurring Payme...	\$30.00	System Administr...	\$30.00	Membership	

If you click on the 'Group by Stock Group' button, this list of transactions will then be summarised into each of your Stock Groups. If you also click on 'Display Invoices', you will simply get a list of all of your Invoiced sales. Note that this does not include any Refunds or Voiced transactions.

July fig 5.



You will then see the Group Totals for each of your Stock Groups (and this will include Petty Cash as a Stock Group). If you need to see more detail, simply click on the 'plus' sign to expand the group. You can then see each of the transactions within that group, ie. the date, transaction type, customer etc..

July fig 6.

Point-of-Sale Sales Record							Current View: General Sales Hist	
Transaction Date	Transaction Type	Amount \$	Sale Description	Item Value \$	Entered By	Amount Rec'd \$	Stock Group	
+ Stock Group : (Total: \$174.90)								
+ Stock Group : BankFee (Total: \$25.00)								
+ Stock Group : Bike Training (Total: \$1,943.00)								
+ Stock Group : Books (Total: \$170.00)								
30/05/2011 11:40 AM	Payment	\$30.00	Healthy Eating	\$35.00	System Administrator	\$30.00	Books	
30/05/2011 11:40 AM	Payment	\$35.00	Healthy Eating	\$35.00	System Administrator	\$35.00	Books	
30/05/2011 11:40 AM	Payment	\$35.00	Healthy Eating	\$35.00	System Administrator	\$35.00	Books	
27/05/2011 1:37 PM	Invoice	\$30.00	Healthy Eating	\$35.00	System Administrator		Books	
31/03/2011 10:47 AM	Payment	\$35.00	Instalment from Jones, Fred: Point-of-Sale (Healthy)	\$35.00	System Administrator	\$35.00	Books	
7/02/2011 12:43 PM	Payment	\$35.00	Healthy Eating	\$35.00	System Administrator	\$35.00	Books	
8/07/2010 2:37 PM	Invoice	\$35.00	Healthy Eating	\$35.00	System Administrator		Books	
8/07/2010 2:35 PM	Invoice	\$35.00	Healthy Eating	\$35.00	System Administrator		Books	
+ Stock Group : Clothing (Total: \$215.00)								
+ Stock Group : Drinks (Total: \$32.10)								

Click on the 'plus' sign to expand the group and view more details.

If you would like to see the overall Totals of a particular column, go to the bottom of that column and do a right mouse click. From the popup menu, you would select 'Sum' and then the total of that column will appear.

July fig 7.

Point-of-Sale Sales Record			
Transaction Date	Transaction Type	Amount \$	Sale Description
+ Stock Group : BankFee (Total: \$25.00)			
+ Stock Group : Bike Training (Total: \$1,943.00)			
+ Stock Group : Books (Total: \$170.00)			
+ Stock Group : Clothing (Total: \$215.00)			
+ Stock Group : Drinks (Total: \$32.10)			
+ Stock Group : Equipment (Total: \$225.00)			
+ Stock Group : Fitness Assessment (Total: \$135.00)			
727 Transaction(s)		\$246,000.00	

Right mouse button to get Total of that column.

- Σ Sum
- Min
- Max
- Count
- Average
- None

The data from the Show Sales area can also be exported to Excel for further manipulations, or printed as a report. Note that when you Print or Export from here, ALL transactions in their expanded form will be included.

Petty Cash

In the 'Show Sales' report, Petty Cash is included as its own Stock Group. If you wish to extract a summary of your Petty Cash Transactions, simply filter this information to this group only.

July fig 8.

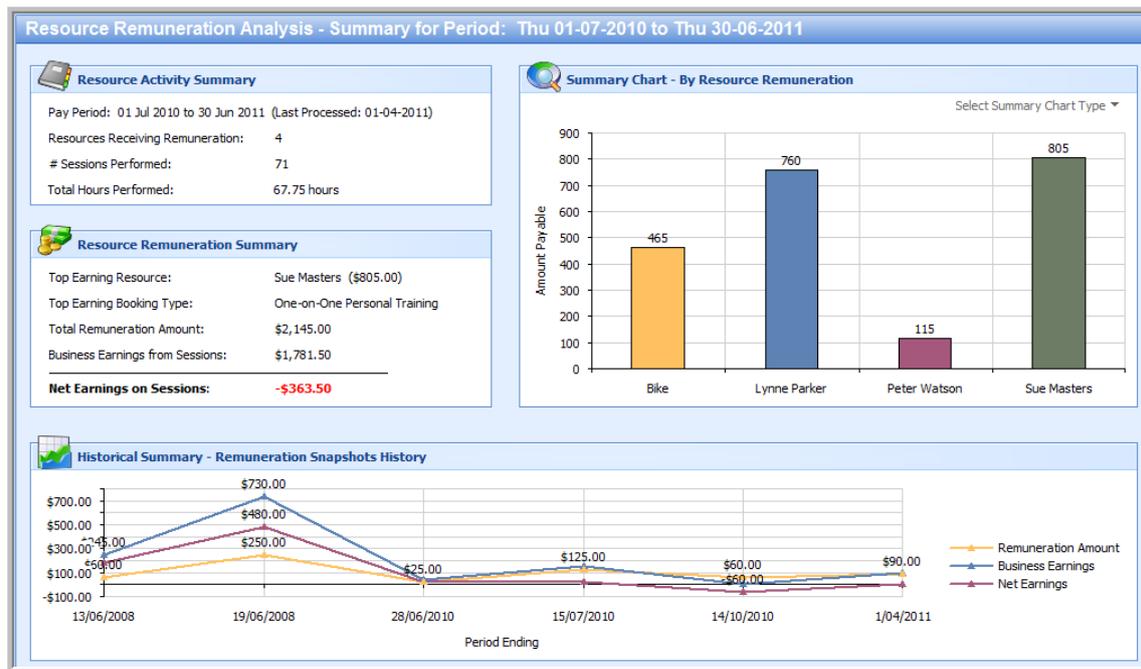
Point-of-Sale Sales Record						Current View: General Sales History	
Transaction Date	Transaction Type	Amount \$	Sale Description	Item Value \$	Amount Rec'd \$	Stock Group	
Stock Group : Petty Cash (-\$1.23)							<input type="checkbox"/> Clothing <input type="checkbox"/> Drinks <input type="checkbox"/> Equipment <input type="checkbox"/> Fitness Assessment <input type="checkbox"/> Flexi Session <input type="checkbox"/> Food <input type="checkbox"/> Group Training <input type="checkbox"/> Gym <input type="checkbox"/> Massage <input type="checkbox"/> Membership <input type="checkbox"/> Memberships <input type="checkbox"/> Personal Training Sessions <input checked="" type="checkbox"/> Petty Cash <input type="checkbox"/> Voucher <input type="checkbox"/> VOUCHERS -\$2.85 Petty Cash
31/03/2011 11:28 AM	Petty Cash Repayment	\$15.00	Petty Cash Receipt: System Administrator	\$0.00			
31/03/2011 11:27 AM	Petty Cash Repayment	\$10.00	Petty Cash Repayment: System Administrator	\$0.00			
31/03/2011 11:27 AM	Petty Cash Repayment	\$5.00	Petty Cash Repayment: System Administrator	\$0.00			
31/03/2011 11:27 AM	Petty Cash Withdrawal	-\$25.00	Petty Cash Withdrawal: System Administrator	\$0.00			
31/03/2011 11:26 AM	Petty Cash Repayment	\$10.00	Petty Cash Repayment: System Administrator	\$0.00			
31/03/2011 11:26 AM	Petty Cash Withdrawal	-\$10.00	Petty Cash Withdrawal: System Administrator	\$0.00			
31/03/2011 11:25 AM	Petty Cash Withdrawal	-\$1.23	Petty Cash Withdrawal: System Administrator - notes to withdraw o...	\$0.00			
31/03/2011 11:24 AM	Petty Cash Repayment	\$2.35	Petty Cash Receipt: System Administrator (notes to pay back the 2...	\$0.00			
31/03/2011 11:23 AM	Petty Cash Repayment	\$0.50	Petty Cash Repayment: System Administrator (notes entered to re...	\$0.00			
31/03/2011 11:22 AM	Petty Cash Withdrawal	-\$2.85	Petty Cash Withdrawal: System Administrator - notes entered to wi...	\$0.00			
12/01/2011 4:41 PM	Petty Cash Withdrawal	-\$5.00	Petty Cash Withdrawal: System Administrator	\$0.00			

You can then put totals on these columns if required, or print/export this data to Excel for further analysis.

Resource Remuneration

You may also be interested in viewing your Resource Remuneration for the last financial year. If you go to the Remuneration area and enter the relevant date range, you can view a summary of the data that you have recorded.

July fig 9.



If you have not already done so, we recommend that you record a snapshot as at the end of year. It is useful to build up a history of this information, which you can refer back to as the need arises.

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

Our latest release - V4.2.10.7 is now available. Please contact us for information regarding the download.