

The Pulse – Issue 37

September '11

Hello CC'ers!!

Well, I'm jealous! Roshini is off to Tahiti no less, for the entire school holidays while the rest of us get to enjoy this mild Melbourne spring weather instead. I hope she brings me back a tan because I am then off to Adelaide for the Australian Masters Games to play hockey....and lily white, winter legs don't look so great in a short skirt!

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.

Testimonials

We are currently gathering testimonials from our clients to add to our new website. If you would like to have your comments included, please let us know. We value your feedback and would really appreciate your thoughts, so drop us a line at support@pulsetecsolutions.com

Past Newsletters

Our Support Website has been re-vamped to make it easier to find topics of interest in our past Newsletters.

Check out the new section as we are sure you'll find some articles that will be useful to you!

Newsletters/Tips

- [The Pulse Issue 23 - Bookings Explorer Views](#)
- [The Pulse Issue 24 - Point of Sale Reporting](#)
- [The Pulse Issue 25 - Responsible Parties](#)
- [The Pulse Issue 26 - Pivot Grid Reporting](#)
- [The Pulse Issue 27 - Forward Date Invoices](#)
- [The Pulse Issue 28 - Newsletter Summary](#)
- [The Pulse Issue 29 - Compound Memberships; E](#)

Handy Hint Number 37

Daily Processes

Just a reminder that you should be running your Daily Processes once per day, if possible!

This housekeeping process within ClientConnect performs some important tasks which help to keep your data up to date. Some of the important functions performed here include:-

- Calculating suspension days and checking expiry dates for your Membership clients
- Ageing debts
- Checking for due/overdue invoices
- Checking for invoice/package recurrences, and creating the next instalment invoice and allocating sessions to packages

If you miss a day, ClientConnect will make up for this next time the process is run, but we do recommend running this process regularly.

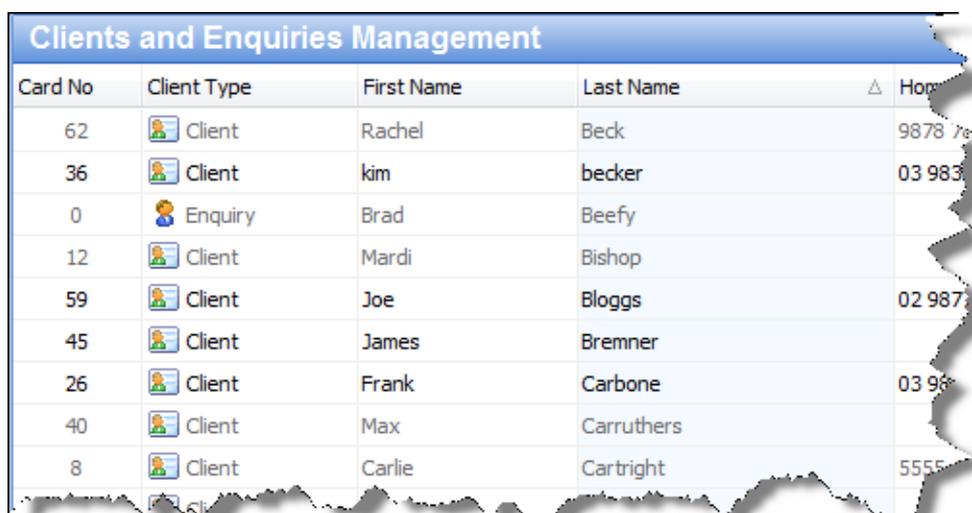
Sorting your Data

InfoViews in ClientConnect allow you to create different views by sorting and filtering your data to suit your needs. But did you know that you can **sort by more than one column** at a time?

For example, on my main Clients and Enquiries screen, I may want to view all of my Clients in alphabetical order, then all of my Enquiries in alphabetical order below that.

If I sort by Last Name only, I would get my Enquiries listed in amongst my Clients.

Fig 1.



Card No	Client Type	First Name	Last Name	△	Home
62	Client	Rachel	Beck		9878 78
36	Client	kim	becker		03 983
0	Enquiry	Brad	Beefy		
12	Client	Mardi	Bishop		
59	Client	Joe	Bloggs		02 987
45	Client	James	Bremner		
26	Client	Frank	Carbone		03 98
40	Client	Max	Carruthers		
8	Client	Carlie	Cartright		5555

What I can do is click on the 'Client Type' heading, this sorts the Type into Clients first and then Enquiries under that. If I then hold the shift key and click on the 'Last Name' heading, it sorts by last name 'within' the client type.

I would then get a list of all of my Clients, sorted alphabetically, and then my Enquiries sorted alphabetically.

Fig 2.

Clients and Enquiries Management				
Card No	Client Type	△	First Name	Last Name
21	Client		Gayorg	Von Trapp
23	Client		Leisl	Von Trapp
873	Client		Jacob	Werewolf
16	Client		Wendy	White
49	Client		Richard	Wilkins
1	Client		Talia	Williams
63	Client		Rachel	Wong
0	Enquiry		Brad	Beefy
0	Enquiry		Jason	Jacobs
0	Enquiry		Jessie	James
0	Enquiry		Ruby	Rose

This could also be useful to sort your members by their Membership Type, and then by Membership Expiry Date. Simply click on the heading for Membership Type, then hold the shift key and click on the Membership Expiry Date heading. The symbol on the heading indicates that you are sorting by this column, and whether it is ascending or descending order.

Fig 3.

Membership Type	△	M'ship Expiry Date	△
m'ship 3 mth upfront		17/09/2010	
.com m'ship 3 mth upfront		17/10/2010	
m'ship 3 mth upfront		7/12/2010	
m'ship 3 mth upfront		29/01/2011	
.com m'ship 3 mth upfront		7/02/2011	
.lf.com m'ship 3 mth upfront		27/05/2011	
m'ship 3 mth upfront		31/05/2011	
School Mums		29/01/2011	
School Mums		28/05/2012	
School Mums		28/05/2012	
Test obs membership			
Weekly			



Club and PT Management Software

Clear the Sort Order

To clear the sorting on a column, hold the Control button, and click on the relevant heading.

If there is a topic that you would like us to cover, or you have a specific task that you need to perform, please give us a call and we can help you find a solution.

RELEASE NEWS

Version 3 Users

Please contact us ASAP. Version 3 is no longer supported. Customers that have a current support agreement can upgrade to V4 at no charge, so please give us a call and we can install the latest features for you. If you do not have a support agreement, please contact us to purchase V4.

Version 4 users

Our latest release - V4.2.10.7 is now available to customers with current Support Agreements. Please contact us for information regarding the download.