

## The Pulse – Issue 39

November '11

Hello CC'ers!!

GOLD, GOLD, GOLD!!!

Did I mention we won the Gold at the Masters Games in Adelaide? 7 games in 6 days, 3 of those were within 24 hours! I now know what real pain is...and when you are over 45 it's even worse because recovery has taken longer than usual. Perhaps a personal trainer will be in order for pre Games training for our next Masters Games in Torino!

### **Reminders**

As usual, please send **ALL** 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, 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](mailto: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; F](#)

## Handy Hint Number 39

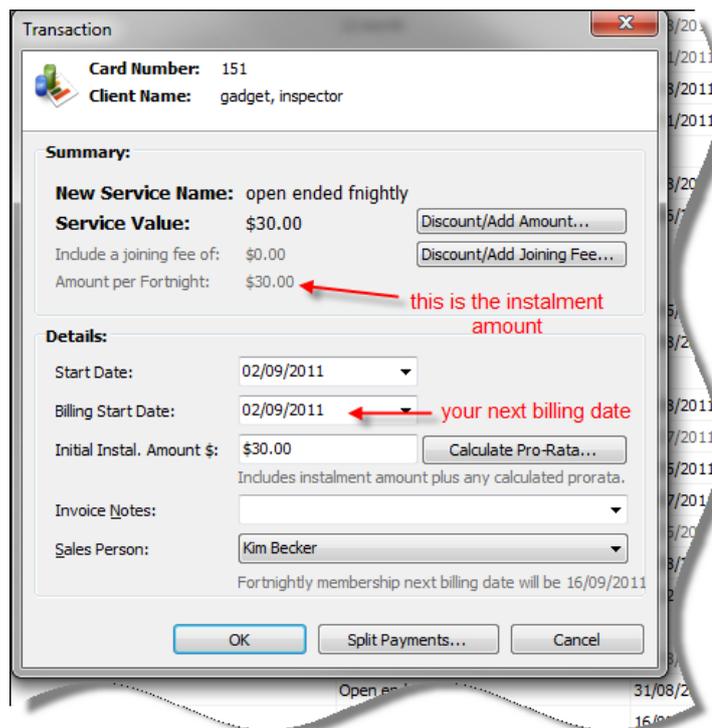
### Open ended Billing in V4.3

With the release of our new version 4.3, we have made some changes to how Open-ended billing is handled. These changes will allow greater flexibility within your billing and you should find them easy to use.

Note that when you sell an Open ended membership, the recurring invoice is not created in the Client's account until the day it is actually due.

The first screen you will see when you make the sale is the transaction screen. This is where you set the billing cycle, starting with the first invoice. The dates will always default to today's date so if your next billing date is not today then you will need to change the 'Billing Start Date'.

Nov fig. 1.



Transaction

Card Number: 151  
Client Name: gadget, inspector

**Summary:**

**New Service Name:** open ended fortnightly  
**Service Value:** \$30.00   
Include a joining fee of: \$0.00   
Amount per Fortnight: \$30.00 ← this is the instalment amount

**Details:**

Start Date: 02/09/2011  
Billing Start Date: 02/09/2011 ← your next billing date  
Initial Instal. Amount \$: \$30.00   
Includes instalment amount plus any calculated prorata.  
Invoice Notes:  
Sales Person: Kim Becker  
Fortnightly membership next billing date will be 16/09/2011

So if your next billing is on the 7/9 (5 days time), the first instalment is calculated to be \$40.71 which is made up of \$30 for the normal instalment plus \$10.71 for the pro-rata for the extra 5 days between 2/9 and 7/9. The billing cycle will be based on the start date of 7/9 and fortnightly after that.

Nov fig. 2.

**Transaction**

Card Number: 151  
Client Name: gadget, inspector

**Summary:**  
New Service Name: open ended fortnightly  
Service Value: \$30.00  
Include a joining fee of: \$0.00  
Amount per Fortnight: \$30.00

**Details:**  
Start Date: 02/09/2011  
Billing Start Date: 07/09/2011  
Initial Instal. Amount \$: \$40.71  
Includes instalment amount plus any calculated prorata.  
Invoice Notes:  
Sales Person: Kim Becker  
Fortnightly membership next billing date will be 21/09/2011

Buttons: OK, Split Payments..., Cancel

So the first invoice for \$40.71....

Nov fig.3.

Voucher Credits Remaining: \$0.00

Trans. Date	Due Date	Type	Inv. #	Rec. #	Description	Inv. Amount \$	Paid \$	Applied \$	Balance \$	Pay M
02/09/2011	07/09/2011	Invoice	974	0	open ended ...	\$40.71		\$0.00	\$40.71	

...is due on the 7<sup>th</sup> which covers from today until the 21<sup>st</sup>, when the next invoice will be created for the following 2weeks.

Nov fig.4.



### Modify Client Billing Cycle

There are now two fields which you can add to the Clients & Enquiries screen called 'Last Billing Date' and 'Next Billing Date'. Last Billing Date was when the last invoice was created and Next Billing Date is when the next invoice will be created.

Nov fig.5.

your daily run for one or more previous days. Click [here](#) to execute them now.

First Name	Last Name	Membership Type	Last Billing Date	Next Billing Date
Sue	Ellis	Open ended f/n	07/09/2011	21/09/2011
inspector	gadget	Open ended f/n	07/09/2011	21/09/2011
gi	joe	Open ended f/n	07/09/2011	21/09/2011
trd	o'brien	Open ended f/n	07/09/2011	21/09/2011
barney	rubble	Open ended f/n	07/09/2011	21/09/2011
	Gorilla			

If you ever need to change the billing cycle for a client, whether you entered them incorrectly initially or they just need to change the DD date, you can now do that very easily.

Open up the clients file and go to the **Recurring (Debit)** tab.

Click on the '**Next Billing Date**' and select the next time you wish the next invoice to be created. From that time on, invoices will be created based on that new date.

Nov fig.6.

Personal Details Services Membership Contacts and Marketing Account **Recurring (Debit)**

**Billing Summary**

Next Billing Date:  Number of Billings:

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.



Club and PT Management Software

## **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 - V4.3.9.0 is now available to customers with current Support Agreements. Please contact us for information regarding the download.