

The Pulse – Issue 47

July '12

This month we detail how to set up a list of clients with upcoming birthdays, so you can send them a promotional voucher. We hope you find it useful.

Hopefully you've all upgraded to our new Version 5 of ClientConnect and have had a chance to see some of the exciting new features. If you would like any more information on these, or any of the features in ClientConnect, please contact Support.

RELEASE NEWS

Our much anticipated new release, **Version 5**, can now be rolled out to customers with current Support Agreements.

Alternatively, you may wish to remain on Version 4 with the current look and feel. Should this be the case, please ensure that you install V4.3.18.0.

Please contact [Support](#) for information regarding these downloads.

Handy Hint Number 47

Client Upcoming Birthday Promotion

In this article, we detail how to send clients a promotional voucher to celebrate their upcoming birthday (whilst also generating some serious goodwill and, in some cases, renewed interest in the business)!

Go to the Clients and Enquiries screen and use the Field Chooser to add the 'Date of Birth (report)' column to the screen. (To invoke the Field Chooser, do a right-mouse click on one of the other column headings. Locate the 'Date of Birth(report)' field and drag it up to make a new column on your Clients and Enquiries screen).

July fig 1.

Clients and Enquiries Management							
Active?	Card No	Client Type	First Name	Last Name	Date of Birth (Report)	Home Phone	
	21	Client	Gayorg	Von Trapp	(All)	44 1234 9985	
	23	Client	Leisl	Von Trapp	(Custom...)		
	873	Client	Jacob	Werewolf	<input type="checkbox"/> (Blanks)		
	49	Client	Shane	White	<input type="checkbox"/> (NonBlanks)		
	16	Client	Wendy	White	<input type="checkbox"/> Yesterday	03 9999 9999	
	1012	Client	Shane	Whitehead	<input type="checkbox"/> Today		
	3	Client	Mitchell	Porter	<input type="checkbox"/> Tomorrow		
	871	Client	Anne	Anneson	<input type="checkbox"/> Last 30 days		
	6	Client	Johnathan	Ashton	<input type="checkbox"/> Last 14 days	03 9876 1234	
	59	Client	Joe	Bloggs	<input type="checkbox"/> Last 7 days	02 9877 1234	
	7	Client	Lynnie	Elliott	<input type="checkbox"/> Next 7 days		
	1004	Client	1	1	<input type="checkbox"/> Next 14 days		
	999	Client	Joseph	Barnard	<input checked="" type="checkbox"/> Next 30 days		
	1003	Client	2	2	<input type="checkbox"/> Last two weeks	14/03/2012	9878 7813
	45	Client		Bremner	<input type="checkbox"/> Last week		

Use the arrow at the right of the heading to locate the filter for 'Next 30 Days' (or whatever time frame you wish). You will then see only those clients with upcoming birthdays in the time frame specified.

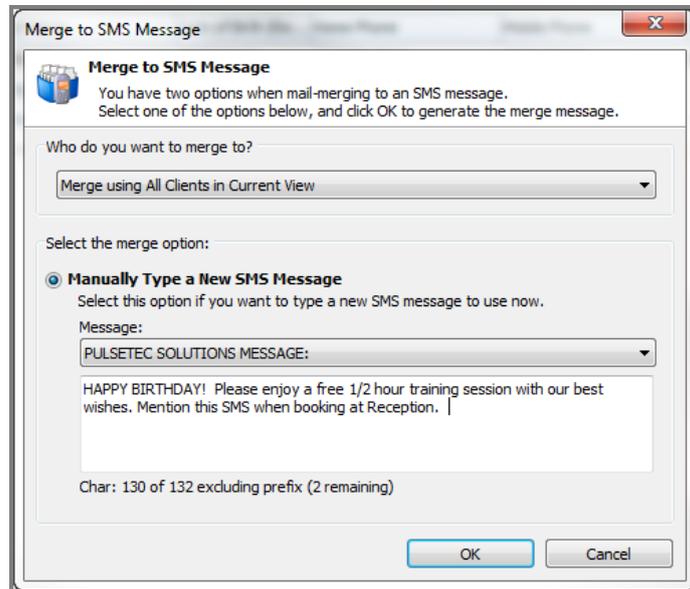
You can then print out this list - go to the 'InfoView' tab and select 'Print', or why not use the Mail Merge to create your letters now too?

From the 'Actions' tab, click on the Mail Merge button and select whether you wish to Merge to a MS Word Document or to an SMS message.

If you wish to **merge to an SMS**, you will need to have established an account with MessageNet. (Go to File Menu > Control Panel > SMS Service to set this up and purchase credits).

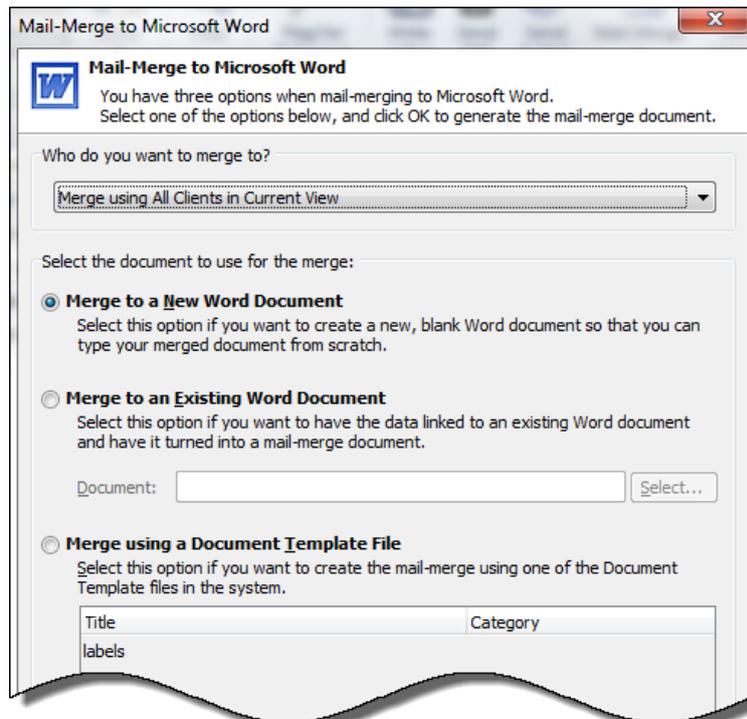
Then it's simply a matter of typing the promotion details into the SMS and sending it to the relevant clients. Of course, they'll need to have a valid Mobile phone number entered in their client file!

July fig 2.



If you wish to **merge to a MS Word** document, select this option from the 'Actions' tab and select 'Merge to All Clients in Current View'. This will go to each of the clients with upcoming birthdays - assuming they have an email address entered!

July fig 3.



Then it's a matter of using the wizard or creating your own merge document in MS Word to complete the process. If you would like more information, please refer to the guide 'Mail Merge', or contact Support.

So hopefully you will find other uses for these filtered lists including Birthday Vouchers, Christmas promotions, pre-season training for skiers, footballers etc.

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.

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.