



Club and PT Management Software

## The Pulse – Issue 49

September '12

This month we show you how to email ClientConnect Invoices and Statements as PDF attachments using a few simple clicks. This little-known function can save you heaps of time and effort, so you don't need to print out monthly statements and post them using 'snail mail'. It's also a safe and easy way to send out reminders to clients with overdue accounts. Check out the article and please let us know if you have any questions.

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**, has now been rolled out to customers with current Support Agreements. Please let us know if you missed out and we can send you the relevant information!

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 49

### ***PDF Invoices and Statements***

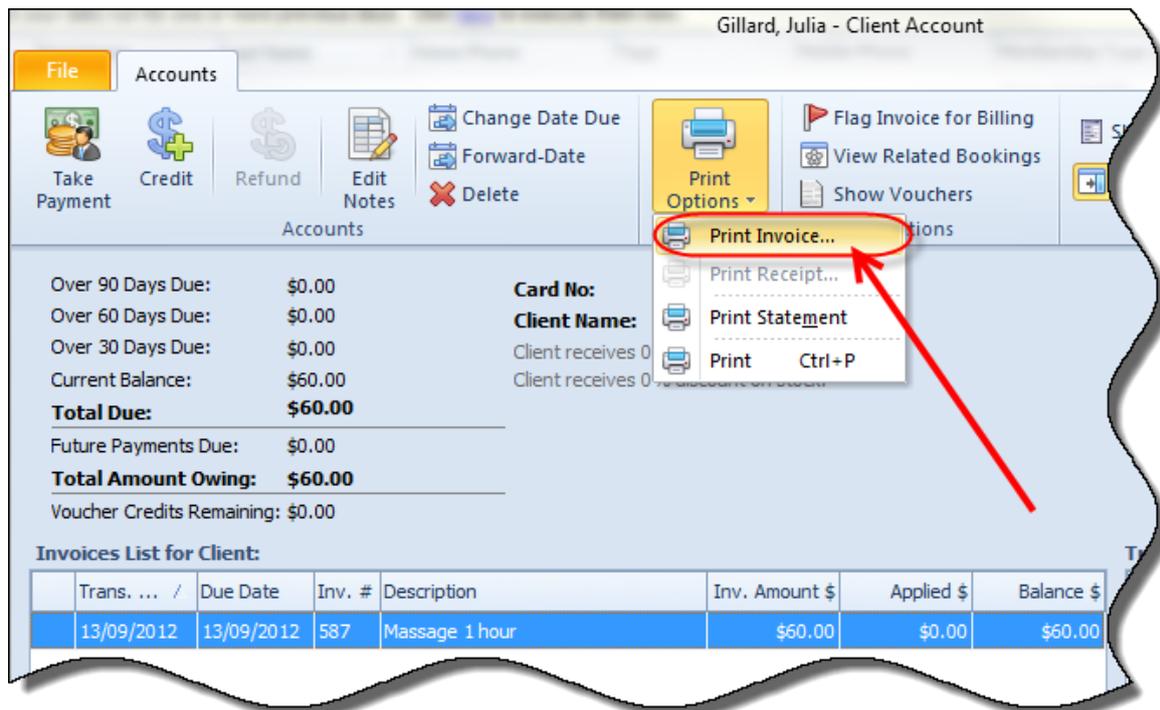
In this article, we detail how to email client Invoices and Statements as PDF attachments. This feature makes use of MS Excel and Outlook (so some of our Mac users might not have this functionality available, depending on your setup).

#### **Email an Invoice or Statement**

To email an invoice, simply sell the relevant item to the client (or select an existing invoice from the client account). Select 'Print Invoice' so that the invoice opens up in MS Excel.

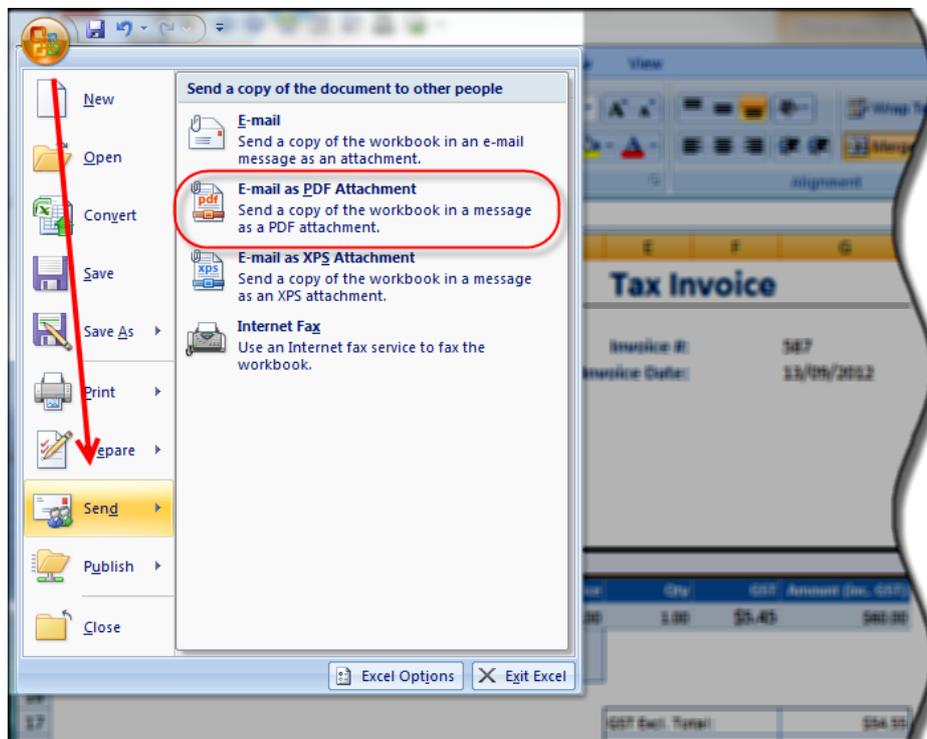
To email a Statement, select 'Print Statement' from the drop down menu on the client account screen.

Sept fig 1.



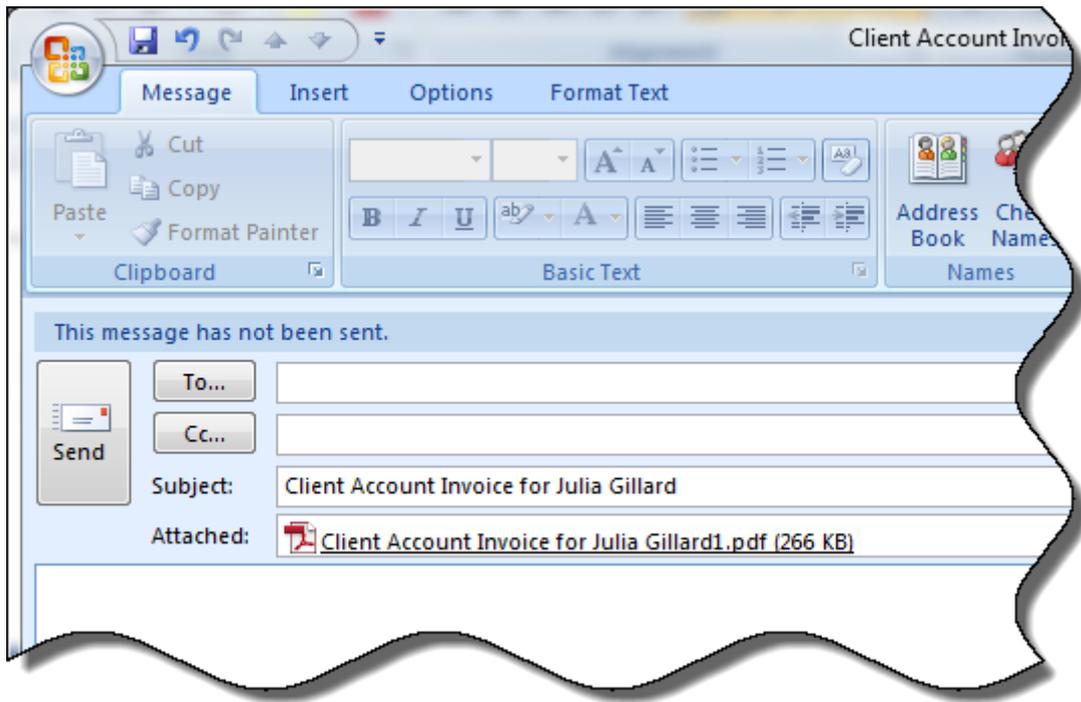
Once you have the Invoice or Statement open in MS Excel, go to the MS Office Button and select 'Send' > 'Email as PDF Attachment'.

Setp fig 2.



MS Outlook will then open a new email and automatically attach the item as a PDF for you. You can then add a custom message in the email and send it to your client.

Sept fig3.



This could be really useful at end of month if you wanted to mail out Statements for all of your overdue accounts.

You could use the Field Chooser and Filtering to create a View that includes overdue items. Make sure your view has the columns for 'Over 30 days', 'Over 60 days' etc as relevant. Then use the Filtering option to select 'non-blanks' or amounts greater than a certain dollar amount. Select the relevant client and create and mail their Statement to them.

Sept fig 4.

Active?	Card No	Client Type	First Name	Last Name	E-Mail Address	Over 30 Days D...	Over 60 Days D...	Over 90 Days D...
Active	9877	Client	Brad	Beefy		\$150.00	\$0.00	\$0.00
Active	45	Client	James	Bremner		\$50.00	\$40.00	\$695.00
Active	34	Client	Luke	Miller		\$60.00	\$60.00	\$850.00
Active	2	Client	Mark	Norton	mark@theshop.com	\$60.00	\$60.00	\$835.00
Active	25	Client	Felicity	Ronneau		\$40.00	\$40.00	\$675.00
Active	4	Client	Wendy	Scott	wendyscott@little...	\$60.00	\$60.00	\$795.00
Active	1007	Client	Hector	Smith		\$55.00	\$55.00	\$464.84

Please contact Support for more information on Views or Filtering.

## **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.

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.