

The Pulse – Issue 54

February '13

This month we talk about the benefits of collecting as much information as possible when entering new clients/enquiries. This information can make your life a whole lot easier down the track - and saves you having to rely on your memory! Check out the article and please let us know if you would like more information. And as always, send us your suggestions and improvements for ClientConnect. We value your feedback.

If there is a topic that you would like us to cover, or you have a specific task that you need to perform, please contact support@pulsetecsolutions.com and we can help you find a solution.

What's new in fitness?

The Australian Fitness & Health Expo is just around the corner!



PulseTec Solutions will once again be exhibiting at the Expo in Sydney, 19-21 April 2013. This year we are looking forward to showing you some exciting new additions to our range of products. We're sure you'll love them as much as we do!

And for our ClientConnect customers, we always have some new features to unveil! 4 weekly billing anyone?

Make sure you register early for your FREE Trade Visitor ticket/s.

http://register.fitnessexpo.com.au/FITNESS13S_V2/index.html

Handy Hint Number 54

Collecting client data for marketing

Taking the time to enter accurate data when entering new clients and enquiries can greatly improve the usability and effectiveness of your database. If you enter data for Client Categories, Contact notes etc., you substantially improve the 'quality' of your data and this can make your life so much easier in the long term.

Apart from being able to see an accurate history of your relationships with clients, you can easily pull out groups/categories of clients for reporting or promotional purposes.

Try it for a month and see!

For example, when you enter a New Enquiry, be sure to populate the marketing fields correctly. And, yes, it takes some time, but be sure to enter accurate data - particularly the 'Contact Subject' when you complete this screen.

Feb fig. 1

Client Enquiry

Log New Client Enquiry
Enter the basic details of the new client enquiry below.
Asterisk (*) denotes a mandatory field.

Date of Enquiry: 14/02/2013

Record Type: Person Entered By: Peter Watson

First Name: * John Last Name: * Smith

Home Phone: 9878 7813 Work Phone: 9878 7813

Mobile Phone: 0418 123 456 E-Mail: john.smith@bigpond.com

Address 1: 476 Canterbury Rd Address 2:

Suburb: FOREST HILL

State: VIC Postcode: 3131

Enquiry Method: Telephone Enquiry Source: Web Site

Contact Method: E-Mail Reminder Method: Telephone

General Notes: Saw ad and voucher on the website. Interested in 12 months, plus some PT

Debit Method: (Not Applicable) Account Name:

Account Number Card Expiry: /

BSB Number:

Date of Birth: 4/02/1983 Sex: Male

Occupation: Plumber Employer:

Initial Contact:

Contact Subject: Membership enquiry

Contact Notes: Gave pricing for 12 months DD m/s \$500

Reminder: You can fill in any other pieces of information by editing the newly created enquiry in the Clients and Enquiries Management screen once you've finished.

Flag for Follow-Up... OK Cancel

Down the track from now, you'll be glad you have this information to refer back to. Sort by Contact Date or Subject to find the relevant information.

Feb fig 2.

Contact History

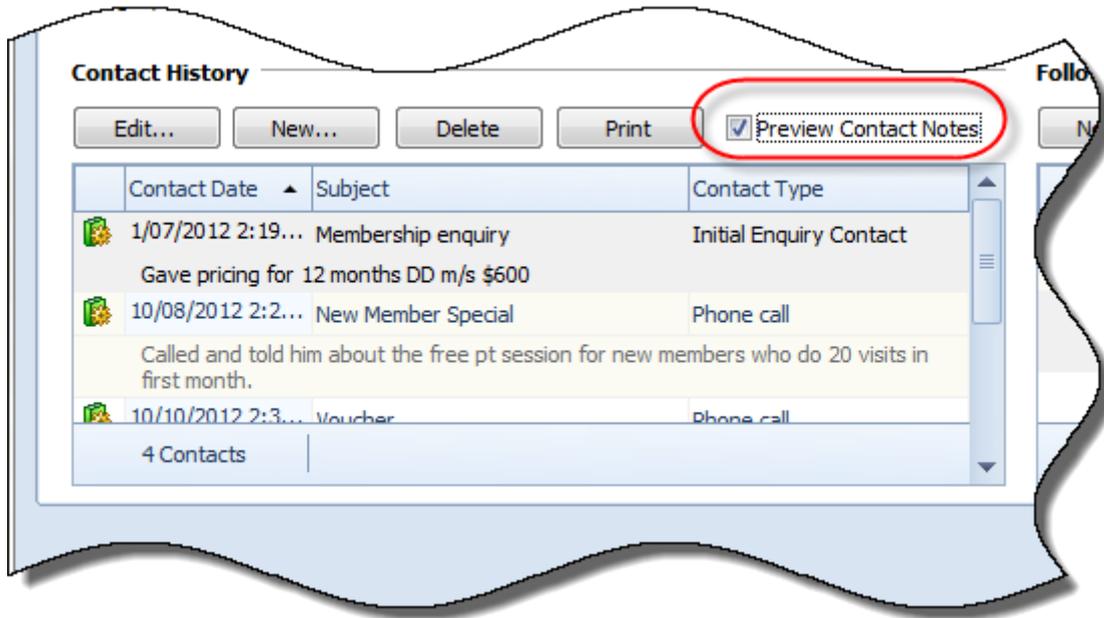
Edit... New... Delete Print Preview Contact Notes: New

Contact Date	Subject	Contact Type
1/07/2012 2:19 PM	Membership enquiry	Initial Enquiry Contact
10/08/2012 2:2...	New Member Special	Phone call
10/10/2012 2:3...	Voucher	Phone call
13/12/2012 2:3...	Voucher	Phone call

4 Contacts

To see details of the Contacts, simply click on 'Preview Contact Notes'. If you've taken the time to fill in meaningful data, you will be rewarded with a full history of interactions with the client. Give your memory a break!

Feb fig 3.



Reminders

As usual, please send **ALL** correspondence to support@pulsetecolutions.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.pulsetecolutions.com> for handy hints, instruction sheets and archived newsletters.

RELEASE NEWS

Our latest release - Version 5.0.27.0 is now available 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.