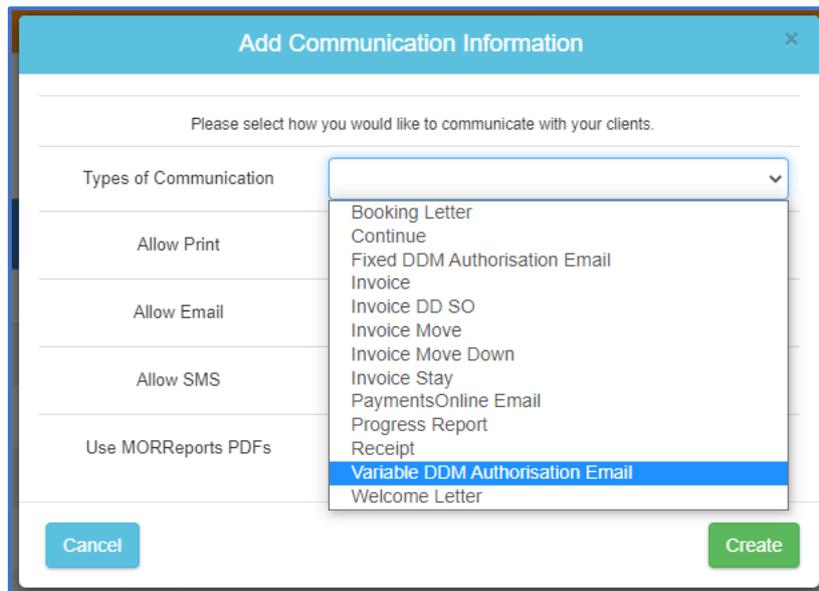


Activating and configuring Direct Debit emails

For a client to authorise your organisation to collect payments by Direct Debit, you will need to send them the mandate that will link SwimSoft to GoCardless, this is sent via email.

Before being able to send this, you will first need to create the default email template. The way you do this is to go to **Client Communication** on the Main Menu and then **Activity Communications** on the sub-menu.

Press the green Create Communication button and select the **Variable DDM Authorisation Email**, ensure the Allow Email toggle is set to **'On'** (this is by default) and finally, press Create.



Next step is to configure the email template, press the green Manage button in like with the new output type which will take you through to the preview of the template. You will notice at first the template is blank, to load the pre-set template, press the **Load Default Template button**.

The default template includes all the information you would need to send to your clients, feel free to add in your logo and any extra information to personalise it for your organisation. Make sure that the following variable is in the template, or your clients will have no link to follow for their Direct Debit mandate. <[DDM_AUTHORISATION_LINK]>.

Ensure you add your Email Reply Address (your organisations admin email) and then you will be able to press Save.

Once your clients have signed up to Direct Debit, any future invoices will need to be catered to this payment method. Using the same process as above, add the Invoice DDSO template to your communication selection and add the default template as before. Now when creating orders for clients who have signed up to Direct Debit, they will receive the correct email with the correct details included.