

Activity Communication

Overview

This guide will show you how to navigate around the **Activity Communication** screen. The Activity Communication section is where you define what client communication you want SwimSoft to create automatically. Although the communication is created automatically, it will not be sent until you release it. Using this method, communication can be created and checked before being sent.

For the most part, you will be using this part of the system to create email templates, however, it is possible to create templates for text messages too.

If you're setting up a system for the first time you should focus on creating the welcome and invoice communication, other elements can be configured at a later date.

The types of communication

Welcome	<p>Welcome communication will generally contain a brief welcome message and possibly terms and conditions.</p> <p>Welcome communication is generated when a client is placed on a course for the first time and the first time only.</p>
Invoice	<p>A standard invoice is created when a client is booked onto a course manually.</p>
DD Authorisation email	<p>An email asking for authorisation to collect fees by Direct Debit.</p> <p>These are used when a client has cancelled a mandate and needs to sign a new one, the invoice mentioned above contains text to allow clients to sign up for direct debit in the first instance. They are created with a new mandate is requested.</p>
Receipt	<p>A receipt that details the fee paid, lessons booked and any sundry items or credits. Receipts are created automatically as payments are made.</p>
Progress Report	<p>Feedback detailing how a student is progressing, a PDF showing the students progress will be attached to these emails, PDFs can be branded and are fantastic for younger children to take to school show and tell sessions.</p>

Booking

This communication is generated if invoicing is turned off, it's used to tell a client what they have been booked into and has no mention of pricing. It is ideal for when products and services are delivered free of charge, such as school swimming lessons.

Special Invoices

SwimSoft Online has three special invoices which are used at re-enrolments.

Invoice DD SO

An invoice used for clients who are paying by direct debit or standing order, this allows the text of the messages to reflect the way the client is paying. i.e the course fee will be collected on...

Invoice Move

Designed for clients who are progressing to a higher level, once again this to allow you to amend your message to reflect the fact the student is moving.

Invoice stay

An invoice for a student who will be staying in the same group next term.

SwimSoft contains a default message for all the types of communication listed above so creating a template can be as simple as making two or three button presses, naturally, you can personalise these and add branding.

Activating communication

Brighton | Swimming | Term 20-April 2021 Main Menu

Activity Communication

Show 10 entries Search: invoice

Edit	Type of Output	Print	Email	SMS	PDF	Delete
	Invoice	No	Manage	No	No	
	Invoice DD SO	No	Manage	No	No	
	Invoice Move	No	Manage	No	No	
	Invoice Stay	No	Manage	No	No	

Showing 1 to 4 of 4 entries (filtered from 11 total entries) Previous 1 Next

← Exit + Create Communication

Click on Create Communication

The following box will appear.

The dialog box titled "Add Communication Information" contains the following elements:

- A header bar with the title and a close button (X).
- A subtitle: "Please select how you would like to communicate with your clients."
- A "Types of Communication" dropdown menu.
- Four rows of toggle switches:
 - Allow Print: OFF
 - Allow Email: ON
 - Allow SMS: OFF
 - Use MORReports PDFs: OFF
- Buttons for "Cancel" and "Create" at the bottom.

Callouts provide the following instructions:

- "Use the drop-down arrow to select the type of communication would like to activate"
- "Select the method(s) you want to communicate by in most cases this will just be email."
- "Click Create to activate the Communication."

Important notes

The print option is purely to support old clients using legacy software, it is not available on the current iteration of the software and hence should not be turned on.

If you are activating Progress Reports you need to allow the email and Use MORReports PDFs options.

Defining a template

Once you have activated the template you must define its contents, this is done by pressing the appropriate manage button as shown in the image below.

Pressing a **Manage** button opens the template editor an example of which is shown below.

The interface shows the "Activity Communication" section with the following details:

- Header: Brighton | Swimming | Term 20-April 2021 | Main Menu
- Search bar: Search: invoice
- Table of communication types:

Edit	Type of Output	Print	Email	SMS	PDF	Delete
	Invoice	No	Manage	Manage	No	
	Invoice DD SO	No	Manage	No	No	
	Invoice Move	No	Manage	No	No	
	Invoice Stay	No	Manage	No	No	

Showing 1 to 4 of 4 entries (filtered from 11 total entries)

Buttons: Previous, 1, Next, Exit, Create Communication

The quickest way to create a template is to press the green button marked **Load Default Template**, and the button marked **Insert Default Address**. You will then need to make a small change or correction in the **Email Reply Address** field, this will confirm to the system that you have completed all aspects of the email template and enable you to save it.

Once you have pressed the two buttons mentioned above the screen will look similar to the one below

The next few paragraphs explain what you are saying and how to use the page.

Let's start with the items in the brackets, most of these have descriptive names ie <[STUDENT_FIRST_NAME]>, these are called variables and will be replaced with the appropriate data before a message is sent so in this particular example you

can expect the subject line of the email to be something like Roslyn Swimming Academy - Invoice for Richard, it means that all the subject lines will be personalised.

There are three types of variables data, pronoun and mixed.

What is a data variable?

A data variable is one that simply inserts something from your database for example the variable <[ORGANISATION_NAME]> will always be replaced by the name of your organisation.

Pronoun variables

A pronoun variable such as <[HE_LABEL_CAPITAL]> will be replaced with He, She or Your, with each of the words being capitalised depending on if the student is a boy, girl or an adult. There are numerous pronoun variables that you can use to personalise your communication, to review what's available to you, press one of the green insert field buttons and scroll down the list that opens.

Mixed variables

Mixed variables are variables where student data within the database is replaced with a pronoun, the most common use is with names for example the text below...

We have allocated <[STUDENT_FIRST_NAME_YOU]> a place on the...

Would read

We have allocated Luci a place on the... If Luci was is a child

and

We have allocated you a place on the... If we were communicating with an adult

Using a combination of fixed text and the various variables you can make professional personalised communication.

Adding a logo

To make your communication pop you can add your branding to emails, instructions on how to do this are detailed in the knowledge base in the communication section in an article entitled 'adding a logo or graphic.'

Links and attachments

Generally speaking, attachments are frowned upon in the world of emails communication as they can carry viruses and impact the performance of email servers, so whilst SwimSoft has the capability of placing attachments on emails we strongly recommend that you actually create links to your supporting documents. This will mean that emails will be processed faster and there is a higher likelihood of them being delivered successfully to your client's email inboxes and not ending up in the client's junk or spam folder.

To create a link, start by placing your cursor where you would like the link to be displayed. Press the **Manage Attachments** button then browse and upload the document you want to attach or link to. Once you have uploaded your document, click on the **Link** button adjacent to the document you require, this will place a link into your template. You can change the links **Display Text** by right-clicking on the link and selecting the **Edit Link** option and editing the **Display Text** you see. You should also click on the second tab marked **Target** and set it to **New Window** (_blank), this means that anybody following the link in your document will see it displayed in a new browser page and won't lose any work.

Inserting the default from email address

Pressing the button marked **Insert Default Address** will place a variable in the templates from the email address field, this variable will be replaced with an actual email address that you set up when you were commissioning the system. To view this email address, simply press the button marked **Settings**. If you change it, press the **Save** button followed by the **Exit** button to return to this page.

Tip: By using the <[COMMUNICATION_EMAIL]> variable here and not simply typing in your email address means if your email address does change, you only have to change it in one place on the **Address and Setting** page which you access by pressing **Activity Configuration** and then **Address and Settings**.

Important information about the email editor

The email editor is a third party product designed to help people create emails on the Internet, as such it has to deal with all the different versions of software and operating systems. Whilst it does a very good job, it has 2 minor limitations that you should be aware of, they are...

Understanding the text editors capabilities

Ensure that you press and hold the Shift key as you press your Enter key, if you do not your cursor will still proceed down the page but a space will not have been added to your template design. The template will look correct but will be delivered to your client with the space removed. If you think you have forgotten to press the shift key when you pressed enter, simply remove all the blank lines and then press the **shift** and **enter** key to reinsert them.

If you have saved your template and re-entered it several times, you will see that the editor adds additional blank lines under bullet-point lists. These need to be removed manually before you save the template.

Previewing messages

Messages can be previewed in a merged state in the **Communication Manager** which we will be covering later, you will have the opportunity to fine-tune your email before it is sent.

SMS

Whilst most of us communicate by email without a problem, clients do have the capability of blocking email messages, sometimes they do this inadvertently and don't know how to unblock them. If documents are of high importance, you can turn on the SMS facility. This means that every time an email is created, a text message is too. This functionality means that you can send the client an email and follow it up with a text message prompting them to check their email folders or the client hub.

Text messages are limited to 150 characters, SwimSoft counts characters but does not currently stop you from writing longer messages. We will be putting a limiter on the system but at this time, you can exceed the limits of the system. Note that if you do write a long message, it will not be delivered and you will be charged, hence it is important to note that you should keep your messages concise.

Below is a text that you could use to create your SMS templates.

<[SALUTATION]>, please check your <[STUDENT_EMAIL]> email account, we have just sent you an email about <[STUDENT_FIRST_NAME]> lessons.

The word <[SALUTATION]>, will be replaced with the client salutation, the variable <[STUDENT_EMAIL]> will be replaced with the client's email address so they know which account you have sent a message to and the <[STUDENT_FIRST_NAME]> variable will either be the students first name or if you are communicating with an adult the word 'your'.

Communication control

If you want to change how you communicate with a client for example turn on SMS, press the **Edit** button at the start of the appropriate row make your changes and then press **Save**.

Activity Communication

Show entries
Search:

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Previous Next

Exit
 Create Communication

Troubleshooting

If at anytime your template and preview become mismatched, take a copy of the template you want, then come to the **Activity Communication** page then press the **Delete** key and create a new template from scratch using the information you've copied.