Communicating to a Groups of Clients

It is common for lessons to be cancelled due to venue closures. SwimSoft makes dealing with situations like these easy by having an efficient group action system.

Should you need to send an email or text message to all your students that the closure affects, for example, all lessons are cancelled on the upcoming Wednesday, you can filter your search to only show students that are due in on Wednesday.


Use the filters to refine your search.

To filter by day, press the **Day** filter button and a new page will pop up.

You can select an individual day, or multiple depending on your search criteria. After selecting which day(s) you require, simply press the **Apply** button to see all the courses.

Now you have refined your search to the relevant courses, at the bottom of the filters menu is a **Group Actions** button.
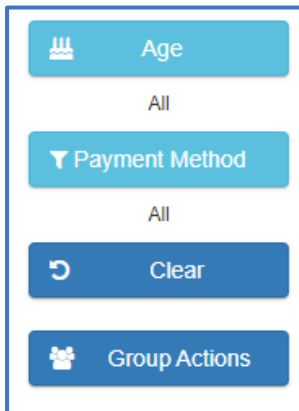

Pressing the **Group Actions** button will bring up a menu of all the various group actions you can perform.

In this situation, you want to send a text message or send email, so you will need to press **Send Email** or **Send SMS**.

	Group Action	Description
Select	Send SMS	Send an SMS to all the students selected
Select	Send Email	Email to all the students selected or export the data.
Select	Create Order	Create a manual order for each student selected by the group action. A screen is provided to allow the description of the order, payments due by and amount to be specified. The amount is defined per membership type.
Select	Add Item to Existing Order	Add an item to an existing order for each student selected by the group action. A screen is provided to allow the description of the item and amount to be specified. The amount is defined per membership type.
Select	Student Data for Export	Allows you to export contact information and outstanding fees.
Select	Credit	Helps you issue credits 'en mass'
Select	Email Data	for Robyn

When you press **Send Email** or **Send SMS**, the system will bring up a list of people who will receive the communication and you can deselect anyone to who you don't wish to send the message.

Once you are happy with who will receive the communication, press the **Create Email**/**SMS** button at the bottom of the page. If you are happy with the number of students in the pop-up, press **OK**.
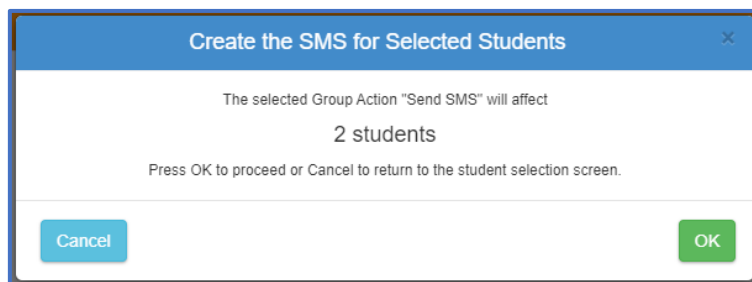
This will take you to the communication message page, where you can free type a message that will go to all selected students. At the bottom of the page, there is an option to **Send Email**/**SMS**, which will create a message for every student, or **Send Email**/**SMS – One per Family**, which will only create one communication per family so parents don't receive the same message multiple times.