

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.

The screenshot shows the SwimSoft interface. On the left is a 'Filter summary' sidebar with various filter categories: Day, Class, Start Times, Teachers, Pools, Course Numbers, Payment Status, Student Status, Membership Types, Age, and Payment Method. Each category has a dropdown menu set to 'All'. On the right is a table of course entries with columns: Students, Configure, Day, Time, Class, Teacher, No, Mins, Section, and Notes. The table shows 6 entries for Tuesday, Wednesday, and Thursday. Below the table are buttons for 'Copy', 'CSV', 'Excel', 'PDF', and 'Print'. At the bottom of the table area are buttons for 'Create Course', 'Exit', and 'Old Version'.

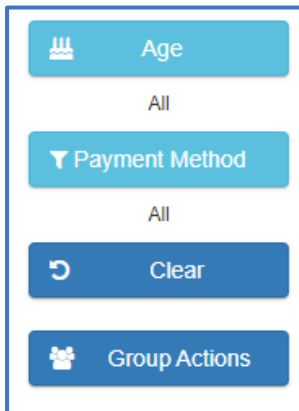
Use the filters to refine your search.

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

The 'Configure Filter - Day' dialog box is shown. It has a title bar 'Configure Filter - Day'. Below the title bar are three checkboxes: 'Tuesday', 'Wednesday', and 'Thursday'. Below the checkboxes is a green 'Apply' button. Below the 'Apply' button are two light blue buttons: 'Select All' and 'Deselect All'. At the bottom is a dark blue 'Exit' button with a left-pointing arrow.

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.



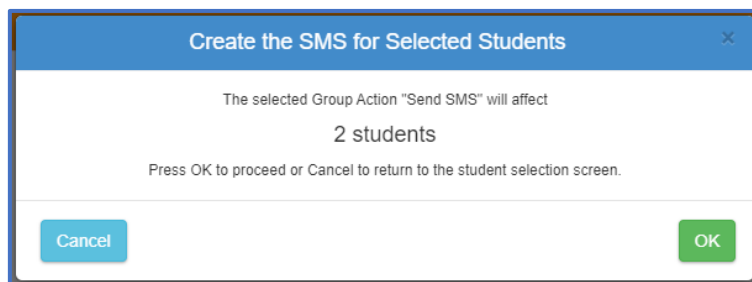
Pressing the **Group Actions** button will bring up a menu of all the various group actions you can perform.

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
<input type="button" value="Select"/> Send SMS	Send an SMS to all the students selected
<input type="button" value="Select"/> Send Email	Email to all the students selected or export the data.
<input type="button" value="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.
<input type="button" value="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.
<input type="button" value="Select"/> Student Data for Export	Allows you to export contact information and outstanding fees.
<input type="button" value="Select"/> Credit	Helps you issue credits 'en mass'
<input type="button" value="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.