

Activity Communication

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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 created automatically, although the communication is created automictically it will not be sent until you realise it, using this method communication can be created and checked before being sent.

The types of communication

Welcome	Welcome communication, this will general
	and the contract of the contra

contain a brief welcome message and possibly

terms and conditions

Invoice A standard invoice is issued the first time a

client is booked on to a course

DD Authorisation email An email asking for authorisation to collect

fees by direct Debit

Receipt A receipt that details the fee paid, lessons

booked along with any sundry items or credits

Progress Report Feedback detailing how the student is

progressing

Special Invoices

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

Invoice DD SO An invoice used for client 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 For client who are progressing or moving, once

again this to allow you to amend you message

for reflect the fact the student is moving.

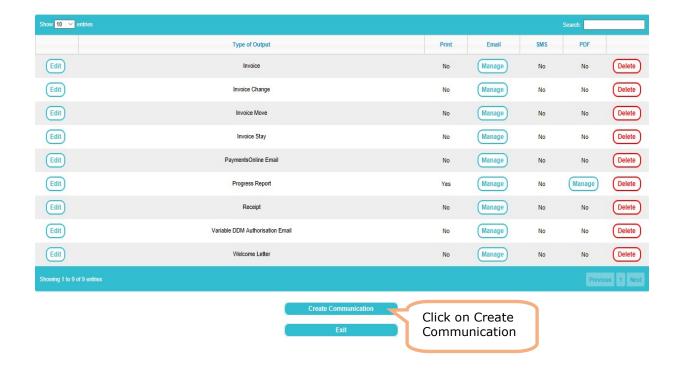
Invoice stay An invoice for a child whole will be staying in

the same group next term

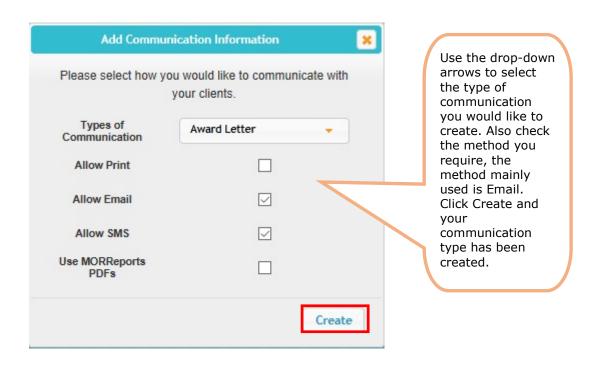


Sample communication email text can be found at the end of this document.

Create Communication



The following box will appear.





Manage Communications

The Edit

these

button will enable you to

amend how

but SMS or Email.

you would like

communicated to your clients,

You can manage your communications using the manage button, like wise if you no longer require a type of communication then you can simply select the delete button.

You can edit and add your logo to an email by clicking on Manage. Show 10 🗸 entries Type of Output Print SMS Edit Invoice Delete No Edit Manage Invoice Change No Edit Edit Invoice Stay No Manage Delete No Edit Delete PaymentsOnline Email Manage Edit Manage Delete Progress Report Manage Edit Manage Delete Edit Variable DDM Authorisation Email No Manage No Delete Edit Manage Welcome Letter No



Sample communication

Welcome Letter Template

Subject line –

<[ORGANISATION_NAME]> - Welcome Letter for <[STUDENT_NAME]>

Body

<[SALUTATION]>

Welcome to <[ORGANISATION_NAME]>, we look forward to teaching <[STUDENT_FIRST_NAME]> over the coming weeks.

<[ORGANISATION_NAME]>'s teachers will work with <[STUDENT_FIRST_NAME]> to ensure <[HE_LABEL]> has fun as <[HE_LABEL]> learns to swim and progress through the various levels. Our teaching structure recognises that everybody will learn to swim at a different rate, so please remember it is perfectly normal to repeat a level several times. We set out to maintain a high quality standard and ensure that every swimmer is truly competent.

At the end of each full term (Approximatly every 8 weeks) <[STUDENT_FIRST_NAME]> will receive a progress report indicating <[HIS_LABEL]> achievements and goals for next term.

And finally, I am sure you will appreciate the pool can be a dangerous environment to non–swimmers. Hence, we have a few rules, these are detailed attached, please make sure <[STUDENT_FIRST_NAME]> knows them before attending the first lesson.

Yours sincerely



Invoice

Subject Line

<[ORGANISATION_NAME]> - <[OUTPUT_TYPE_NAME]> for <[STUDENT_NAME]>

Email Body

<[SALUTATION]>

We have allocated <[STUDENT_FIRST_NAME_YOU]> a place on the <[CLASS]> course running on <[COURSE_DAY]> at <[COURSE_TIME]> with <[TEACHER_NAME]>. Lessons will take place in <[POOL_SECTION_NAME]> of the <[POOL_NAME]>. The course will run from <[COURSE_START_DATE]> and comprises <[NO_OF_LESSONS]> lessons running until <[COURSE_END_DATE]>. The actual lesson dates are detailed below.

<[ORDER_DETAILS_TABLE]>

The total amount payable is <[ORDER_TOTAL_OUTSTANDING]>. Payment to be made by <[PAYMENT_REQUIRED_BY]>.

Regards



Default Receipt

Subject line

<[ORGANISATION_NAME]> - Payment Receipt

Body

<[SALUTATION]>

Thank you for your recent payment of £<[PAYMENT_DETAIL_PAID_AMOUNT]> which we recorded on the <[PAYMENT_DETAIL_PAID_DATE]>

<[PAYMENT_ORDER_DETAILS_TABLE]>

Detailed Payment Information

<[PAYMENT_DETAILS_TABLE]>

Many thanks

<[COMMUNICATION_CONTACT_PERSON]>

Outstanding Payments (If any)

<[POL_PAYMENT_DETAILS_TABLE]>



Invoice Stay

Subject Line

Re enrolment information for <[STUDENT_NAME]>

Body

<[SALUTATION]>

As we draw to the end of the term, we have been assessing students' progress.

<[STUDENT_FIRST_NAME_CAPITAL]> needs to progress a little more before proceeding to <[CLASS_NEXT_LEVEL]>, With this in mind, we have allocated <[STUDENT_FIRST_NAME_YOU]> a place on the same course next term i.e. the <[CLASS]> course running on <[COURSE_DAY]> at <[COURSE_TIME]> with <[TEACHER_NAME]>. Lessons will take place in <[POOL_SECTION_NAME]> of the <[POOL_NAME]>. The course will run from <[COURSE_START_DATE]> and comprises <[NO_OF_LESSONS]> lessons running until <[COURSE_END_DATE]>. The actual lesson dates are detailed below.

<[ORDER_DETAILS_TABLE]>
The total amount payable is <[ORDER_TOTAL_OUTSTANDING]>. Payment to be made by <[PAYMENT_REQUIRED_BY]>.

Regards



Invoice Move

Subject Line

Re enrolment information for <[STUDENT_NAME]>

Body

<[SALUTATION]>

As we draw to the end of the term, we have been assessing students' progress.

<[STUDENT_FIRST_NAME_CAPITAL]> needs to progress a little more before proceeding to <[CLASS_NEXT_LEVEL]>, With this in mind, we have allocated <[STUDENT_FIRST_NAME_YOU]> a place on the same course next term i.e. the <[CLASS]> course running on <[COURSE_DAY]> at <[COURSE_TIME]> with <[TEACHER_NAME]>. Lessons will take place in <[POOL_SECTION_NAME]> of the <[POOL_NAME]>. The course will run from <[COURSE_START_DATE]> and comprises <[NO_OF_LESSONS]> lessons running until <[COURSE_END_DATE]>. The actual lesson dates are detailed below.

<[ORDER_DETAILS_TABLE]>
The total amount payable is <[ORDER_TOTAL_OUTSTANDING]>. Payment to be made by <[PAYMENT_REQUIRED_BY]>.

Regards



Invoice DD SO

Subject Line

Re enrolment information for <[STUDENT_NAME]>

Body

<[SALUTATION]>

As we draw to the end of the term, we have been assessing students' progress.

We have allocated <[STUDENT_FIRST_NAME_YOU]> a place on the <[CLASS]> course running on <[COURSE_DAY]> at <[COURSE_TIME]> with <[TEACHER_NAME]>. Lessons will take place in <[POOL_SECTION_NAME]> of the <[POOL_NAME]>. The course will run from <[COURSE_START_DATE]> and comprises <[NO_OF_LESSONS]> lessons running until <[COURSE_END_DATE]>. The actual lesson dates are detailed below.

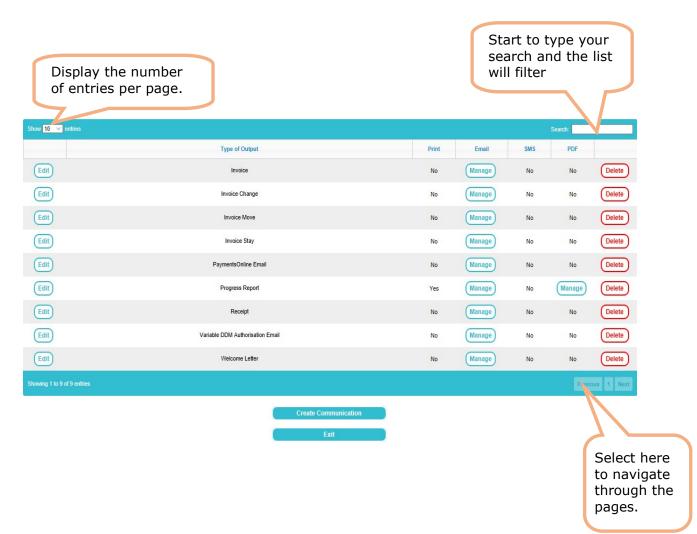
<[ORDER_DETAILS_TABLE]>

The total amount payable is <[ORDER_TOTAL_OUTSTANDING]>. Payment will be collected in the next few days.

Regards



General Information



If any aspect of this manual needs improvement, please email support@morsolutions.co.uk with your suggestion(s).