

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 automatically 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 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

Show 10 entries		Search:				
	Type of Output	Print	Email	SMS	PDF	
Edit	Invoice	No	Manage	No	No	Delete
Edit	Invoice Change	No	Manage	No	No	Delete
Edit	Invoice Move	No	Manage	No	No	Delete
Edit	Invoice Stay	No	Manage	No	No	Delete
Edit	PaymentsOnline Email	No	Manage	No	No	Delete
Edit	Progress Report	Yes	Manage	No	Manage	Delete
Edit	Receipt	No	Manage	No	No	Delete
Edit	Variable DDM Authorisation Email	No	Manage	No	No	Delete
Edit	Welcome Letter	No	Manage	No	No	Delete

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The following box will appear.

Add Communication Information
✕

Please select how you would like to communicate with your clients.

Types of Communication Award Letter ▾

Allow Print

Allow Email

Allow SMS

Use MORReports PDFs

Create

Use the drop-down arrows to select the type of communication you would like to create. Also check the method you require, the method mainly used is Email. Click Create and your communication type has been created.

Manage Communications

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.

Show 10 entries

	Type of Output	Print	Manage	SMS	PDF	Delete
Edit	Invoice	No	Manage	No	No	Delete
Edit	Invoice Change	No	Manage	No	No	Delete
Edit	Invoice Move	No	Manage	No	No	Delete
Edit	Invoice Stay	No	Manage	No	No	Delete
Edit	PaymentsOnline Email	No	Manage	No	No	Delete
Edit	Progress Report	Yes	Manage	No	Manage	Delete
Edit	Receipt	No	Manage	No	No	Delete
Edit	Variable DDM Authorisation Email	No	Manage	No	No	Delete
Edit	Welcome Letter	No	Manage	No	No	Delete

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The Edit button will enable you to amend how you would like these communicated to your clients, but SMS or Email.

You can edit and add your logo to an email by clicking on Manage.

Create Communication

Exit

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

<[LOCATION_CONTACT_PERSON]>

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

<[LOCATION_CONTACT_PERSON]>

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

<[LOCATION_CONTACT_PERSON]>

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

<[LOCATION_CONTACT_PERSON]>

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

<[LOCATION_CONTACT_PERSON]>

General Information

Display the number of entries per page.

Start to type your search and the list will filter

Show 10 entries		Search:			
	Type of Output	Print	Email	SMS	PDF
Edit	Invoice	No	Manage	No	No Delete
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Edit	Welcome Letter	No	Manage	No	No Delete

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