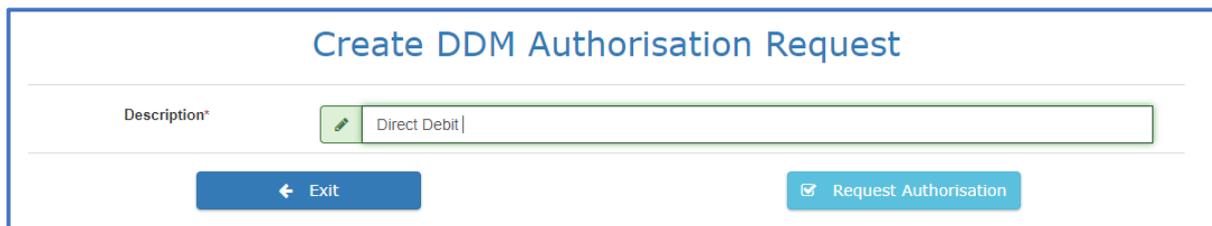


How to send a DDM Authorisation Request email to a group of clients

If you want to ask all or a portion of your clients to sign up for Direct Debit in one go, you can do this using one of the Group Actions.

Start on the Main Menu and go to **Courses** and then **Search**. Use the filters in the left-hand column to refine the search to clients you wish to send this communication to.

Press the Group Action button at the bottom of the filters list and select the **Create DDM Authorisation Request** option. You will see a list of the clients you will be sending this email to, if correct, press the green **Create DDM Authorisation Request** button at the bottom of the page. There will be a pop-up which will specify the total amount of clients, press the **OK** button and finally, check the Description of the Direct Debit is as you would wish and then press the Request Authorisation button.



Create DDM Authorisation Request

Description*

The DDM Authorisation Request emails will now be on the **Manage Communications** page waiting to be sent, this will include a unique link that will take the client through to a page to authorise their family's unique mandate.