

Reviewing and Creating Communication

This document is designed to help you check your communications will be sent successfully to client's and if there is an issue, how to resolve it.

To check which students you have sent a particular communication to, you will need to go to **Client Communication** on the **Main Menu** and then **Review Communication**.

Configure Filter - Document Selector

Manage Comms

Template Name	Email	SMS
Booking Letter	Unselected	
Fixed DDM Authorisation Email	Unselected	
Invoice	Unselected	
Invoice Stay	Unselected	
Manual	Unselected	Unselected
Progress Report	Unselected	
Variable DDM Authorisation Email	Unselected	
Welcome Letter	Unselected	

Press Apply

Select the type of communication you would like to review

Apply

← Exit

The screenshot shows the 'Client Communications' page. On the left is a 'Filter summary' sidebar with categories like Day, Class, Start Times, Teachers, Pools, Course Numbers, Payment Status, Student Status, and Membership Types, each with an 'All' option. The main area has a title 'Client Communications' and a 'Credits Available: 74' indicator. It includes date filters for 'From Date' (01-Feb-2022) and 'To Date' (28-Feb-2022), a search bar, and a 'Show 25 entries' dropdown. Below is a table with columns: CDS, First Name, Last Name, Class, No, Day, Time, Mins, Teacher, and Status. Three rows are visible, each with an 'Invoice' button. At the bottom, there are 'Copy', 'CSV', 'Excel', 'PDF', and 'Print' buttons, a 'Message All Students' button, and a note: 'Message All Students will create Documentation for all students in the search results, students can only be messaged when a single communication has been selected.'

The **Client Communications** page is split into four elements. Firstly, you have a line for each student who has been booked in. There is a date filter at the top to show which period you are currently working within, the right-hand column you have the document indicator and on the left-hand side of the page, there are the filters relevant to the page.

To ensure that you are seeing the relevant information, check that the '*from*' and '*to*' dates correspond to the time you want to review the documents from – this is usually the current date.

The document status displays white boxes with the communication type if there has been no communication generated for the student at that time. You can use the filters on the left of the page to refine the search criteria - for example, the **Communication Status** can be set to **Missing**, **Pending** or **Sent**. Setting this to **Missing** and then pressing **Apply**, would bring up all students who have not been sent a communication and you can then use the **Message All Students** button to generate the missing communications.

The dialog box is titled 'Configure Filter - Communication Status'. It contains three rows of checkboxes: 'Missing' (checked), 'Pending', and 'Sent'. Below the checkboxes are three buttons: a green 'Apply' button, two blue buttons 'Select All' and 'Deselect All', and a blue 'Cancel' button.

Once the communications have been generated, the white boxes will turn orange and inform you of how many documents have been generated. You will need to send your communications via **Client Communication** and **Manage Communication**.

Client Communications

Credits Available: 74 Add From Date: To Date: Search Reset

Show entries Search:

	CDS	First Name	Last Name	Class	No	Day	Time	Mins	Teacher	Status: Email <input type="checkbox"/> Print <input type="checkbox"/> SMS <input type="checkbox"/>
+	+	Rufus	Spencer	Stage 2	537	Tuesday	12.00	30	A Sample	Invoice 1
+	+	Molly	Ridge	Stage 1	534	Tuesday	10.00	30	A Sample	Invoice 1
+	+	Tom	Ridge	Stage 1	534	Tuesday	10.00	30	A Sample	Invoice 1

Showing 1 to 3 of 3 entries Previous 1 Next

Copy CSV Excel PDF Print

Message All Students will create Documentation for all students in the search results, students can only be messaged when a single communication has been selected.

← Exit
Message All Students

If there are still white boxes that failed to turn orange when the document was generated, this indicates a problem. You will need to go to the student's **CDS** and check their **correspondence** information and their parent or guardians' **contact** information.

Once the communications have been sent via the **Manage Communications** page and have left the system, the boxes will turn green.

Client Communications

Credits Available: 74 Add From Date: To Date: Search Reset

Show entries Search:

	CDS	First Name	Last Name	Class	No	Day	Time	Mins	Teacher	Status: Email <input type="checkbox"/> Print <input type="checkbox"/> SMS <input type="checkbox"/>
+	+	Rufus	Spencer	Stage 2	537	Tuesday	12.00	30	A Sample	Invoice 5
+	+	Molly	Ridge	Stage 1	534	Tuesday	10.00	30	A Sample	Invoice 5
+	+	Tom	Ridge	Stage 1	534	Tuesday	10.00	30	A Sample	Invoice 2

Showing 1 to 3 of 3 entries Previous 1 Next

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Message All Students will create Documentation for all students in the search results, students can only be messaged when a single communication has been selected.

← Exit
Message All Students