Setting up Email Templates

Introduction

MOR Money includes several email templates to support the day-to-day operation of your system. These templates are used to communicate important information to clients, such as payment receipts, account statements, collection invoices and miscellaneous invoices.

MOR Money email templates are accessed by selecting **MOR Money** from the Main Menu, followed by **Email Templates**.

Each email template is described below, along with details of when it is used.

MOR Money Email Templates

1. Account Receipt

The **Account Receipt** email is generated when payments are recorded, provided the **Communication State** is set to **On**.

When a payment is made, a pop-up window will appear, giving you the option to:

- View and send the receipt immediately; or
- Store the receipt in the **Communication Manager** to be sent at a later date.

Stored communications can be accessed by selecting **Client Communication** from the Main Menu, followed by **Manage Communication**.

2. Account Statement

The **Account Statement** email is used to send monthly statements to clients.

Statements can be:

- Generated in bulk from the Ledger; or
- Generated on demand from a family's account page by pressing the **Statement** button.

3. Collection Invoice

This email details the amount you are planning to collect from a client. It will typically also contain the relevant payment information, such as your bank account details and sort code.

Collection Invoice emails are created automatically when you run a ledger-based Collection group action. The email will be saved in the Communication Manager, ready to be sent when appropriate.

Collection Invoice can also be generated manually from the family's account page by pressing the **Invoice** button associated with the collection invoice.

4. Collection Invoice DD

The **Collection Invoice DD** email is very similar to the standard Collection Invoice email but is used when a client is paying by Direct Debit.

This template allows you to make it clear that:

- No payment is required from the client at this time; and
- The amount detailed will be collected by Direct Debit on the specified date.

5. Miscellaneous Invoice

The **Miscellaneous Invoice** email is used when an order has been created for miscellaneous items. These emails are not generated automatically. They can be created manually by pressing the **Invoice** button associated with the purchase.

6. Miscellaneous Invoice DD

The **Miscellaneous Invoice DD** email is used to support orders placed for miscellaneous items when the client has authorised payment by Direct Debit.

Creating MOR Money Email Templates

Each of the email templates listed above needs to be defined before it can be used.

To begin creating a template, press the relevant **Manage** button on the **Email Templates** page.

Useful Tip: A default template has been created for each of the MOR Money email types listed above.

When setting up your templates, press **Load Default Template** to use the default wording as a starting point. You can then amend the template to suit your own requirements.

SwimSoft email templates

In addition to the MOR Money email templates detailed above, two new templates need to be created for each location and activity, these templates are created by pressing **Activity Configuration** followed by **Activity Communication**, they are as follows...

1. Invoice Account	This email template is used and displayed as a client is booked onto a course. It allows the coordinator to advise the client that the fee for their booking has been placed into their account.
2. Invoice Account DD	This email template is used and displayed as a client is booked onto a course. It allows the coordinator to advise the client the fee for their booking has been place into their account and importantly it will be collected by Direct Debit in due course.