System Configuration - Communication

Recap

If you're reading this document you should have configured your system, built your first courses and you're probably thinking about placing students onto those courses and rightly so.

Next step

However, before we do that we need to think about how we are going to communicate with clients and what will be in the communication. In this section we're going to show you how to connect SwimSoft to email and SMS services, so you can send emails and and text messages. Then we will show you how to set up and modify email templates, such as your invoice. This will mean that when you place a student onto a course, SwimSoft can create the necessary communication and you'll be in a position to send it.

Let's deal with email first.

SwimSoft only creates emails

What do we mean when we say that SwimSoft only creates emails? Well, exactly that. SwimSoft will create your emails but then it passes them to either an email service or server to be delivered. These servers and services are provided by third party companies, we recommend that you do use the services of a company called SMTP2GO, as over the years they have handled 10's of thousands of emails for swim schools using SwimSoft. They have proven themselves to be a reliable partner and better still only charge a modest fee. Part of their system allows you to track emails and see if they have been delivered, so if a client turns around and says they '*didn't get your email*' you can always check your system. Here you have the ability to trace an email all the way from it's creation in SwimSoft, to delivery to the clients device.

SMTP2GO fees

SMTP2GO is a partner company and as such charges for their services. The latest fees can be found by navigating to their website and selecting the pricing option.

www.smtp2go.com/pricing/

Setting up and Configuring SMTP2GO account

This task can be broken down into four sections, they are:

- Signing up for SMTP2GO
- Configuring SMTP2GO
- Creating CNAME records
- Connecting SwimSoft and SMTP2GO

Each of the above processes takes between 10 and 15 minutes to complete, you won't need a credit or debit card at this point but you will need a pen and paper to note down the login and password details for the new account you create.

All the instructions you need are contained within a **Help** file within SwimSoft. The starting point is to press the **System Configuration** button on SwimSoft's **Main Menu** and then press **Email Configuration**.

Understanding and configuring email templates

Within SwimSoft you need to activate and define your email templates, there are many templates used to support tasks such as; Invoicing, Receipt creation and feeding back Progress Information. To see the full list of templates, activate the ones you want to use and personalise them, press **Client Communication** on SwimSoft's **Main Menu** then press **Activity Communication.** For detailed instructions on how to do this, please press the **Help** button on the top right-handside of the **Activity Communication** page. Please note that you need to create templates for each location and activity that you operate.

More information about SMS

The previous section covered how to create SMS templates, remember that SMS stands for **Short Message Service**, messages should be 150 characters or less. You'll find there is a counter on the message creation interface to advise you how long your message is. If you exceed 150 characters your messages will not be sent and you may have multiple credits deducted from your account.

SMS messages sent from SwimSoft are not free, we charge 10 Pence plus VAT per message. This fee covers the cost of the text message and the costs that we incur integrating and maintaining SwimSoft with an SMS system called Text Anywhere.

Credits are purchased online by pressing **System Configuration** and **Purchase Credits**. Once you have purchased a credit it will remain available on your account until used. There are various pages within SwimSoft where you can create SMS messages, these pages will show you how much credit you have left. These pages also have a link to the **Purchase Credit** page, you will always be returned to the page you came from once you have made your purchase.