

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

Allow Print

Allow Email

Allow SMS

Use MORReports PDFs

Award Letter ▼

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]>.

To streamline our administration we prefer payment by Direct Debit, we collect a whole term fees using the services of a company call GoCardless prior to the start of each term. Please follow the link below to (MOR Solutions – our swimming software provider) to sign up for this service.

<[DDM_AUTHORISATION_LINK]>

Please note at the end of this term you will be sent an invoice similar to this one detailing your next terms booking, fee due and the approximate date of the collection. If you do not wish to continue swimming, simply cancel your Direct Debit at your bank or contact us prior to the payment being requested.

Regards

<[LOCATION_CONTACT_PERSON]>

Booking Template

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.

<[COURSE_LESSONS_TABLE]>

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]>.

To streamline our administration we prefer payment by Direct Debit, we collect a whole term fees using the services of a company call GoCardless prior to the start of each term. Please follow the link below to (MOR Solutions – our swimming software provider) to sign up for this service.

<[DDM_AUTHORISATION_LINK]>

Please note at the end of this term you will be sent an invoice similar to this one detailing your next terms booking, fee due and the approximate date of the collection. If you do not wish to continue swimming, simply cancel your Direct Debit at your bank or contact us prior to the payment being requested.

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]>.

To streamline our administration we prefer payment by Direct Debit, we collect a whole term fees using the services of a company call GoCardless prior to the start of each term. Please follow the link below to (MOR Solutions – our swimming software provider) to sign up for this service.

<[DDM_AUTHORISATION_LINK]>

Please note at the end of this term you will be sent an invoice similar to this one detailing your next terms booking, fee due and the approximate date of the collection. If you do not wish to continue swimming, simply cancel your Direct Debit at your bank or contact us prior to the payment being requested.

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]>

My Lessons Invitation Email Setup

Email Subject

<[ORGANISATION_NAME]> - New Client Portal

Email Body

<[SALUTATION]>

We are pleased to advise you that you can now view your lesson details online, on your phone, tablet or PC, the new system allows you to:-

- Message us directly.
- Manage your contact details.
- Check the waiting list(s) you are on.
- View the awards passed.
- View the health information we have on record.

If you have any other children you want to join lessons you can enter their details and message us so we can place them or pop them on the waiting list.

If you want to use the service simply click the link below and then follow the on screen instructions.

<[MY_LESSONS_URL]>

If you have any questions or queries do not hesitate to contact us, please allow up to 24 hours for us to respond

Regards

<[LOCATION_CONTACT_PERSON]>

My Lessons Complete Registration

Email Subject

<[ORGANISATION_NAME]> - New Client Portal

Email Body

<[SALUTATION]>

We are pleased to advise you that we have enabled our software to allow you to manage your contact information on our system, this means you will be able to see which courses and lessons you have been allocated and which waiting lists you are on, edit your details and communicate with the admin team.

To use the system, please use the link below to access the log in page then enter your username and password.

<[MY_LESSONS_URL]>

Username: <[STUDENT_EMAIL]>

Password: <[MY_LESSONS_ACTIVATION_CODE]>

If you change or forget your password, you can always use the forgotten password link on the login page and the system will create you a new password.

If you change your email address this will become your new username.

If you have any questions please email <[MY_LESSONS_CONTACT_EMAIL]>

Regards,

<[LOCATION_CONTACT_PERSON]>

My Lesson Password Reminder

Email Subject

<[ORGANISATION_NAME]> - My Lessons Login Information

Email Body

<[SALUTATION]>

Please find below your username and a new password to access the system. Start by following the link below to access the login in page.

Once you have logged in you will be prompted to define a new password.

<[MY_LESSONS_URL]>

Username: <[STUDENT_EMAIL]>

Password: <[MY_LESSONS_ACTIVATION_CODE]>

If you have any problems please email
<[COMMUNICATION_CONTACT_PERSON]> for support on
<[MY_LESSONS_CONTACT_EMAIL]>

Many thanks

<[ORGANISATION_NAME]>

General Information

Display the number of entries per page.

Start to type your search and the list will filter

Show 10 entries		Search: <input type="text"/>				
	Type of Output	Print	Email	SMS	PDF	
Edit	Invoice	No	Manage	No	No	Delete
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Edit	PaymentsOnline Email	No	Manage	No	No	Delete
Edit	Progress Report	Yes	Manage	No	Manage	Delete
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If any aspect of this manual needs improvement, please email support@morsolutions.co.uk with your suggestion(s).