Creating and Managing Communications

As the re-enrolment process takes place, the system generates communications for you to send to your clients. Once the emails have been generated, they will be ready to send under **Client Communications** and **Manage Communications**.

There are a total of thirteen different types of communication within SwimSoft, you may not require the use of all of them, the ones that will be relevant for re-enrolment are:

Invoice DD SO

An invoice is used for clients who are paying by direct debit. 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

Designed for clients who are progressing to a higher level, this allows you to amend your message to reflect the fact that the student is moving.

Invoice Stay

An invoice for a student who will be staying in the same group next term.

Progress Report

Feedback detailing how the student is progressing.

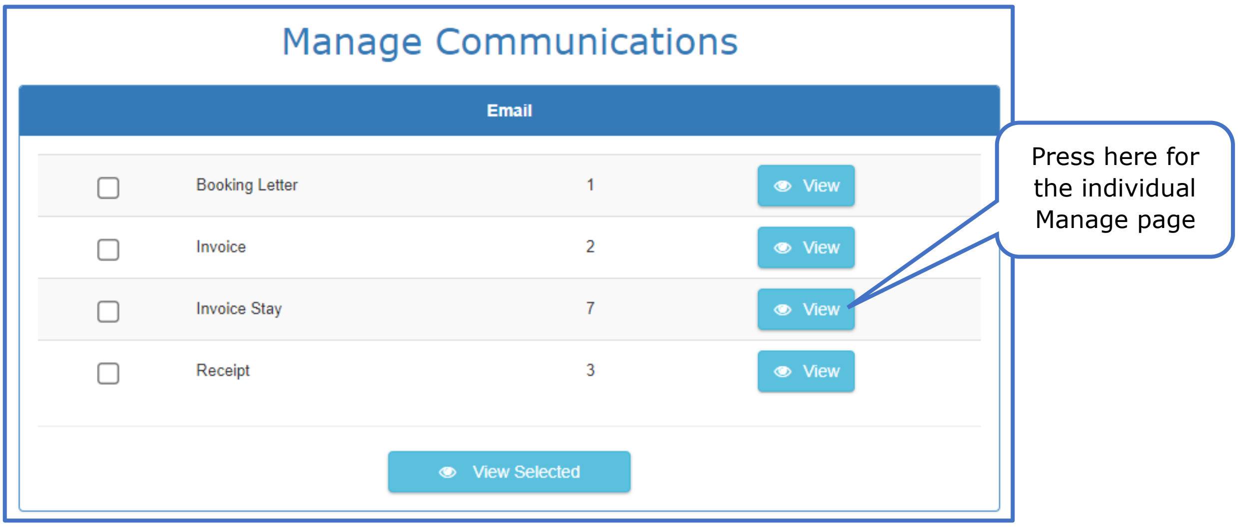
Booking Letter

If Create Orders has been turned off, instead of generating an invoice when a child is booked onto a course, the system will generate a booking letter.

For in-depth information regarding creating communications, go to the Knowledge Base- by pressing the **Help** button in the top right corner of the Main Menu - and **expand** the **Communication section**. You can then read through the first document, titled **Activating Communication.**

To create a communication template, go to **Client Communication** on the Main Menu and press **Activity Communication** on the Secondary Menu. Here, you can press the green **Create Communication** button and **select** the name of the communication you require. Once you have done this, press the green **Manage** button next to the output type and you can either create your unique document or press the **Load Default Template** button and then make changes as you wish.

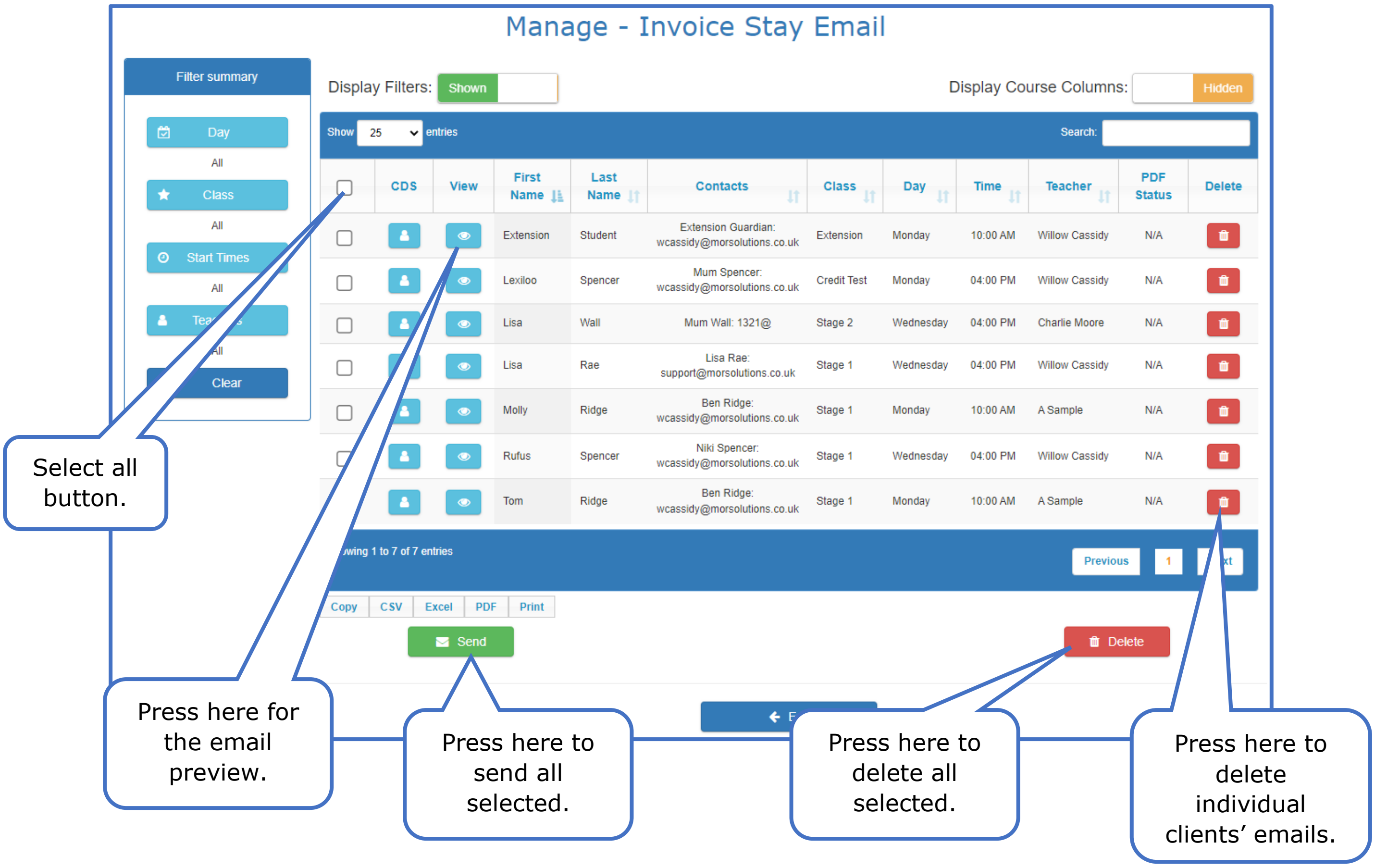
Once you have made sure you have all the templates configured that you will need for re-enrolment, you can continue with the process. Once re-enrolment is complete, you will find all the generated communications under Client Communications and Manage Communications.



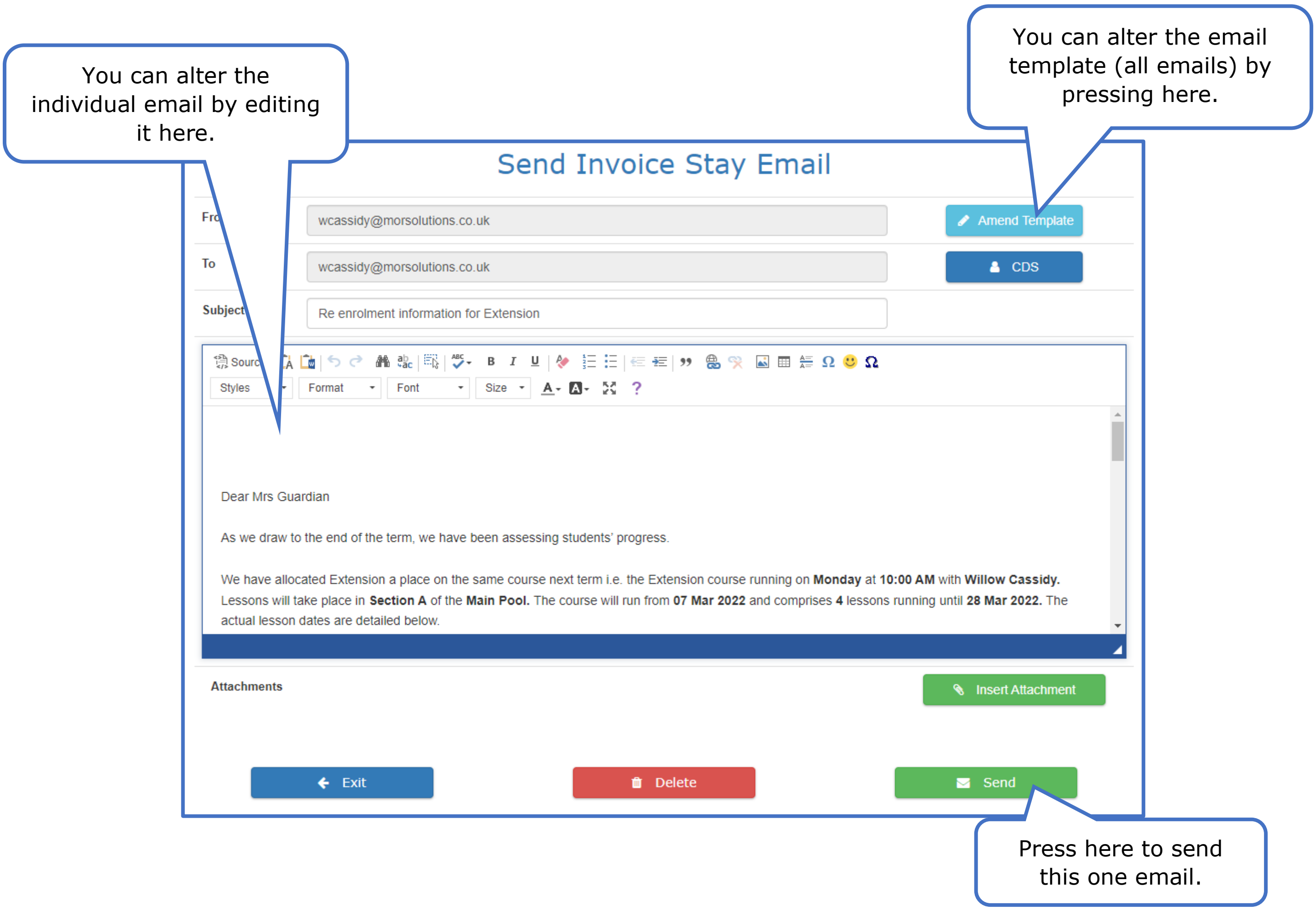
The above shows an example of a **Manage Communications** page; SwimSoft does not automatically send these emails, so you have full control over what your clients receive.

From this page, you can view the exact email a client will receive, make changes to the template, make changes to an individual email, and select what emails you wish to send.

Press the **View** button next to an email to be taken to the Manage page for that individual communication type.



Pressing on the **View** button next to a student's name will show you a preview of that particular client's email, including all their unique information pulled through from the variables. You can edit the individual email by making changes on this page and then press the green Send button. If you notice an error that has been made in the original template, press the blue Amend Template button at the top-right of the page and then proceed to correct the mistakes.



After the changes have been made, press the green **Save** button and then press **Exit** to be taken back to the email preview. If you are happy with the content and layout of the email, press **Exit** again and select all the emails and finally, press the green **Send** button to send all emails.