

Sending emails to clients

After placing a student on a course, you would ideally like to communicate with the parent/guardian. Email communications are generated in the background as the students are placed onto courses and so this document will explain how you can send these out via SwimSoft.

Start by going to **Client Communication** on the Main Menu and then **Manage Communications** on the secondary menu. Here, you will see the emails that have been generated automatically based on the processes you have performed, these are usually Invoices, DDM Authorisations (If you have Direct Debit set up), possibly a Welcome Letter if the student is new to your organisation and if you have orders turned off you will see a Booking Letter.



Pressing the **View** button next to a communication type will take you through to the page shown below.

	Manage - Booking Letter Email												
Filter summary	Display F)isplay Filters: Shown							Display Course Columns: Hidden				
🖄 Day	Show 50	✓ entries				Search:							
All		CDS View	First Name 🔒	Last Name 🎵	Contacts	Class	Day Iî	Time J†	Teacher	PDF Status	Delete		
All			Harry	Morrish	Harry Morrish: Harry@morsolutions.co.uk	Stage 3	Wednesday	02:00 PM	Lisa Test	N/A			
All			Lexiloo	Spencer	Mum Spencer: wcassidy@morsolutions.co.uk	Credit Test	Wednesday	04:00 PM	Willow Cassidy	N/A	â		
La Teachers	5/1		Mary	Morrish	Mary Morrish: rmorrish@morsolutions.co.uk	Stage 2	Wednesday	04:00 PM	Charlie Moore	N/A	•		
S Clear			Molly	Ridge	Ben Ridge: wcassidy@morsolutions.co.uk	Stage 1	Wednesday	10:00 AM	A Sample	N/A	Ê		
			Olivia	Andrews	Tammy Andrews: 269@morsolutions.co.uk	Stage 2	Wednesday	12:00 PM	A Sample	N/A			
		A	Rufus	Spencer	Niki Spencer: wcassidy@morsolutions.co.uk	Stage 1	Wednesday	04:00 PM	Willow Cassidy	N/A	İ		
Press here to			Tom	Ridge	Ben Ridge: wcassidy@morsolutions.co.uk	Stage 1	Wednesday	10:00 AM	A Sample	N/A			
see the preview			Willow	Cassidy	Mum Cassidy: wcassidy@morsolutions.co.uk	Stage 2	Wednesday	02:00 PM	A Sample	N/A	•		
of the email for individual	Showing 1 to 8	Showing 1 to 8 of 8 entries Previous 1 Nex											
clients	Copy CSV Excel PDF Print Image: Send												

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From the preview page of an email, you can make changes that will only affect the current student's invoice. Alternatively, you can press the **Amend Template** button which will apply the changes to all emails of this communication type, ensure you press the **Save** button after updating the template.

Send Booking Letter Email												
From	wcassidy@r	wcassidy@morsolutions.co.uk										ate
То	Harry@mors	Harry@morsolutions.co.uk										
Subject	Support Sys	Support System - Booking Letter for Harry Morrish										
Styles - Dear Mr Mo We have all The course	rrish pocated Harry a plac will run from 06 Apr	e on the S	tage 3 course comprises 4	e running lessons r	on Wednes	day at 2:00 27 Apr 202	PM with Lisa 2. The actua	a Test. Lesso Il lesson dates	ns will take pl are detailed	ace in Sectic below.	on A of the Main Poo	ÞI.
No Da	te Day	Time	Duration	Pool	Section	Teacher						
Attachments	← Exit					1 Dele	te				৩ Insert Attachmo অ Send	ent

You can press the green **Send** button at the bottom right of the page to send the current email. If you wish to send all the emails in the **Manage Communications** page, go back to the previous page and select all documents using the select box at the top left of the page. Finally, press the green **Send** button in the bottom left of the page, the emails will disappear from the page, meaning they have been sent.