



Communication Guide

This guide explores the communication features of First Class Software including bulk messaging, automation, and more.

Setting up templates

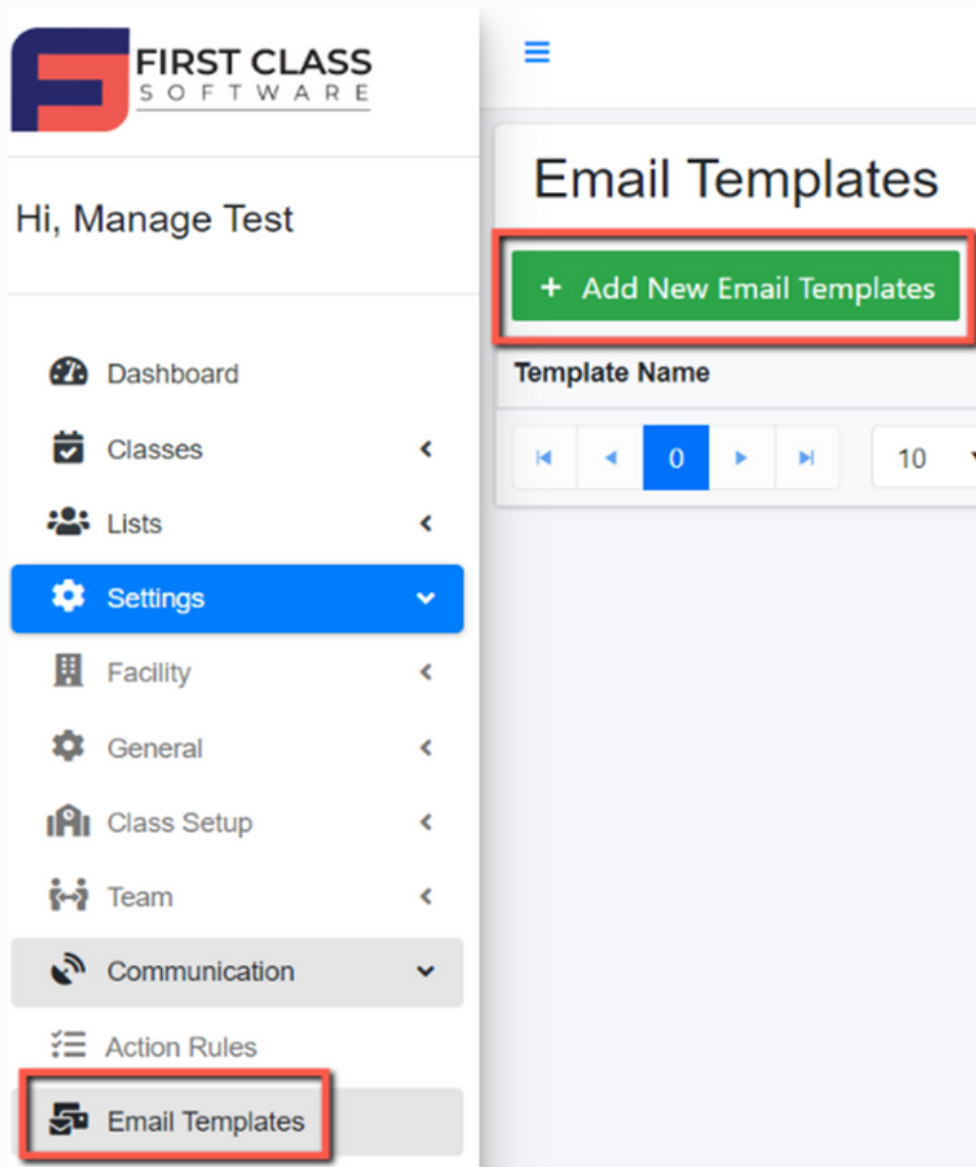
Templates save you time by giving you pre-built email or SMS content.

Within First Class, you have a library of templates you can add to and edit.

Go to *Settings > Communication > Email Templates*

How can I add a new template

You can add a new template by clicking the green add template button in the top left corner of the template page.



How can I add personalised fields to the template?

You will notice within the template section that there are a number of orange buttons with various names on them.

This represents the fields you can embed into your email content.

If you click on one of these buttons it will add the appropriate field tag into your email template in the form of a field code. (This will pull the appropriate user data into the email to personalise it on sending).

Template Details

Template Name

Subject

Insert Parent: Parent Portal Link, First Name, Last Name

Insert Student: First Name, Last Name, Joined Date, Login, Password

Insert Teacher: First Name, Last Name, Email, Phone

Insert Assessment: Assessment Date, Current Level, Graduate Level, Next Level

Insert Class Details: Class Details, Program Name

Insert Absent Class: Absent Class Date

Insert School Manager: Username, Password, First Name, Last Name, School Name, Student Enroll Form Link

Insert Facility: Name, Location Name, Short Name, Phone, Email, Address, Website

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How can I edit a template?

You can edit an existing template by using the pencil button on the right side of a template. This will pop open the template in an editable format in the template window.


When your edits are complete ensure you update the template to save your changes.

Email Templates

+ Add New Email Templates

Search: You've turned 3!

Template Name	Action Type	Subject	Content
You've turned 3!	Action Email	<#SFName#> has turned 3!	<p>Hi <#ParentFName#>,</p> <p>Congratulations! <#SFName#> has turned 3!</p> <p>This means that it is time for <#SFName#> to move out of the Aquababies program and into our Learn to Swim Under 5's program.</p> <p>To change <#SFName#>'s booking, please give us a call on <#FacilityPhone#> during business hours, and we can move them to their new level.</p> <p>Alternatively, you can change your class on pool deck via the on deck officer or email swimschool@fremantle.wa.gov.au and we will get in touch as soon as we can.</p> <p>Should you have any questions please contact the swim program team.</p> <p>Kind Regards,</p> <p>Swim Program Team</p> <p>Fremantle Leisure Centre</p>



How can I add a subject line?

The subject line can be found at the top of the template.

Is the email builder in First Class HTML enabled?

Yes, the email builder in First Class is HTML enabled.

However, you will need to paste in your own HTML code for it to display correctly.

How can I send a test email?

We recommend using a test student linked to a test email you have access to.

You can also use free services like Mailinator to almost instantly set up a test email.

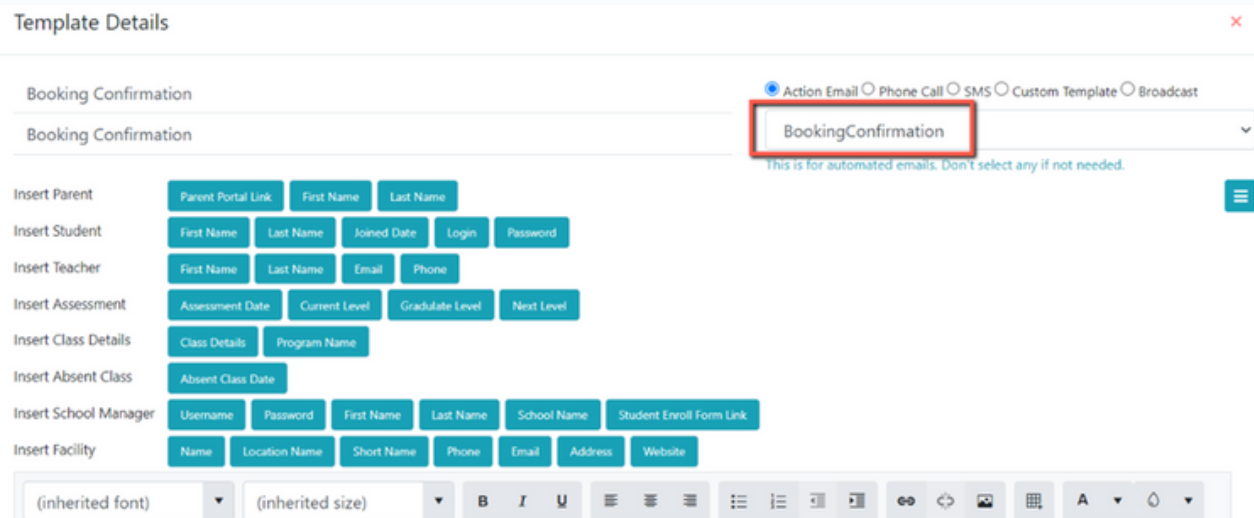
How do I set up a booking confirmation email for all bookings?

The “class details” data embedded data field is available within your available personalised field options.

This will include the student's class details including day, level, time, and teacher.

You can use this in a template to create a booking confirmation email.

The booking confirmation email can be turned on by selecting the action email template type and selecting booking confirmation from the action drop-down.



Template Details

Booking Confirmation

Booking Confirmation

Action Email Phone Call SMS Custom Template Broadcast

BookingConfirmation

This is for automated emails. Don't select any if not needed.

Insert Parent: Parent Portal Link, First Name, Last Name

Insert Student: First Name, Last Name, Joined Date, Login, Password

Insert Teacher: First Name, Last Name, Email, Phone

Insert Assessment: Assessment Date, Current Level, Graduate Level, Next Level

Insert Class Details: Class Details, Program Name

Insert Absent Class: Absent Class Date

Insert School Manager: Username, Password, First Name, Last Name, School Name, Student Enroll Form Link

Insert Facility: Name, Location Name, Short Name, Phone, Email, Address, Website

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Can I attach a document to an email template?

Yes, you can attach a document such as a PDF to an email template. See the upload attachments button at the bottom of the template builder.

Note: You can only upload documents to a template, you cannot attach documents to normal bulk emails that you create within the email content creation window within the send email/SMS section.

Bulk emails/SMS

How can I send a bulk email or SMS to multiple contacts?

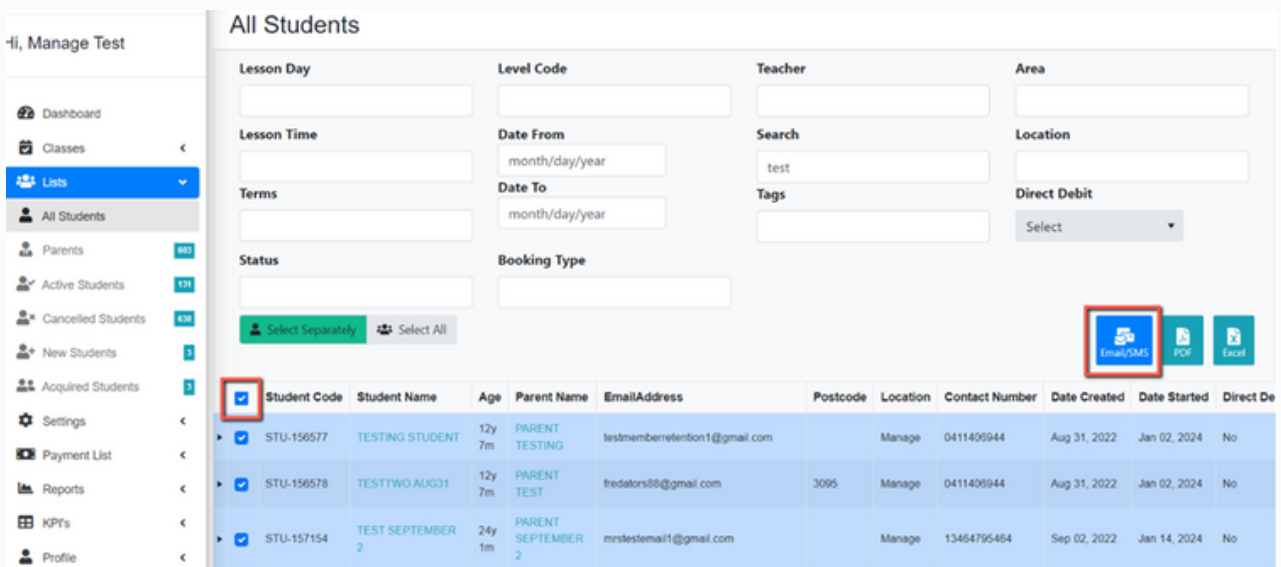
Go to the lists section.

You may want to choose active students, parents, or all students depending on who you are targeting.

From the list, you can use filters to segment your list.

For example, you may wish to segment your contacts by lesson day, by level, or by teacher. You can also layer filters to get very specific results. For example, you may wish to filter all the students with a Wednesday class who are at a dolphin level. You can achieve this by applying multiple filters at once.

Once you have filtered your list, you can choose between selecting all students in that list (Green button) or selecting specific students within that list by ticking the small box next to their name. Once you have selected who you want to include in the communication, the next step is to push the email/SMS button.



<input checked="" type="checkbox"/>	Student Code	Student Name	Age	Parent Name	EmailAddress	Postcode	Location	Contact Number	Date Created	Date Started	Direct De
<input checked="" type="checkbox"/>	STU-156577	TESTING STUDENT	12y 7m	PARENT TESTING	testmemberretention1@gmail.com		Manage	0411406944	Aug 31, 2022	Jan 02, 2024	No
<input checked="" type="checkbox"/>	STU-156578	TESTTWO AUG31	12y 7m	PARENT TEST	fredators88@gmail.com	3095	Manage	0411406944	Aug 31, 2022	Jan 02, 2024	No
<input checked="" type="checkbox"/>	STU-157154	TEST SEPTEMBER 2	24y 1m	PARENT SEPTEMBER 2	mrstestemail1@gmail.com		Manage	13464795464	Sep 02, 2022	Jan 14, 2024	No

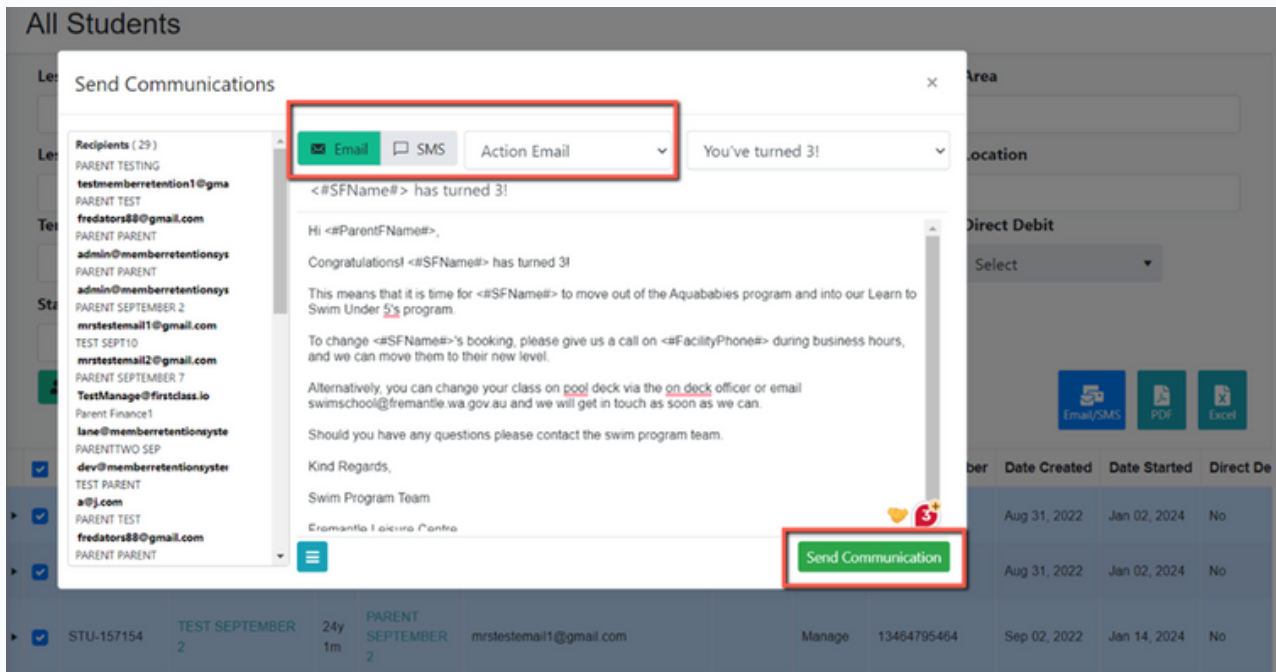
This will pop up the email/SMS content window.

Here your first step is to choose between sending an email or sending an SMS.

You can change this by clicking on the email or SMS mode button.

Once you have selected your mode, you can choose between selecting a pre-existing template from your library or you can type directly into the window to create a new message.

Once you are happy to proceed, you can click the send communication button to confirm and send your message.



The screenshot shows the 'Send Communications' window with the following details:

- Recipients (29):** A list of email addresses including 'testmemberretention1@gmail.com', 'fredators88@gmail.com', 'admin@memberretentionsys...', 'mrstestemail1@gmail.com', 'TestManage@firstclass.io', 'lane@memberretentionsyste...', 'dev@memberretentionsyster...', 'a@j.com', and 'fredators88@gmail.com'.
- Mode:** 'Email' is selected, with 'SMS' and 'Action Email' options also visible.
- Subject:** 'You've turned 3!'
- Message Preview:**
 - Subject: <#SFName#> has turned 3!
 - Hi <#ParentFName#>.
 - Congratulations! <#SFName#> has turned 3!
 - This means that it is time for <#SFName#> to move out of the Aquababies program and into our Learn to Swim Under 5's program.
 - To change <#SFName#>'s booking, please give us a call on <#FacilityPhone#> during business hours, and we can move them to their new level.
 - Alternatively, you can change your class on pool deck via the on deck officer or email swimschool@fremantle.wa.gov.au and we will get in touch as soon as we can.
 - Should you have any questions please contact the swim program team.
 - Kind Regards,
 - Swim Program Team
 - Eromania Iokiva Pantis
- Buttons:** 'Send Communication' button is highlighted at the bottom right.

How many characters are in an SMS?

A standard SMS fits 160 characters. In First Class, there is a counter which tells you how many characters you have used in your SMS.

If you go over 160 you will be allowed to continue, it just will mean you will be charged 2 credits for the message rather than one.

How much does SMS cost in First Class?

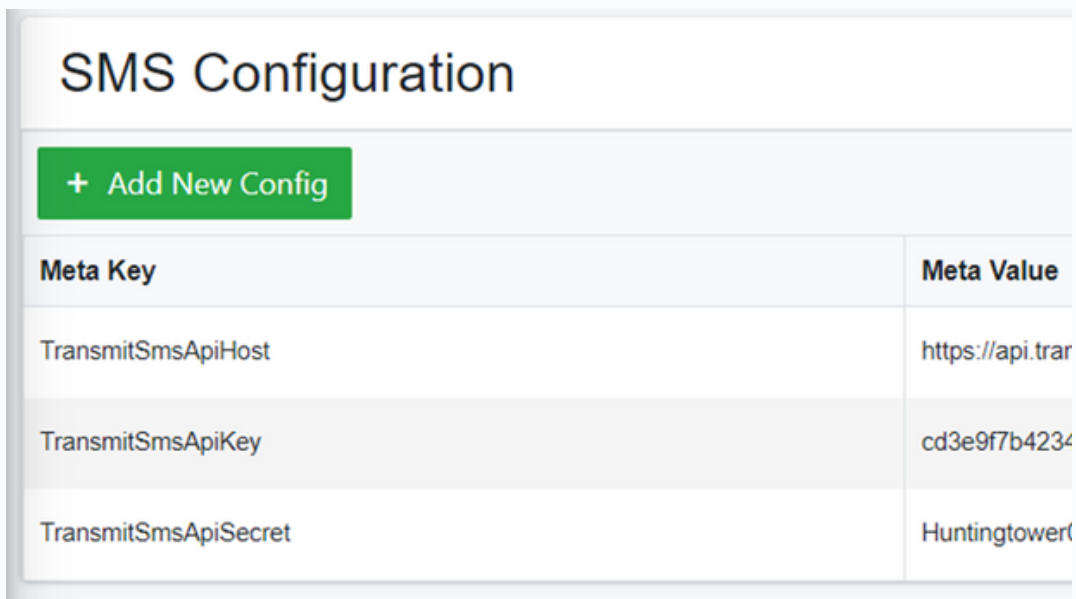
The cost of SMS is approximately 9c AUD however this can vary depending on the territory/country.

Please speak to your account representative to confirm the exact amount per SMS.

How can I confirm the SMS feature is set up in my First Class account?

You can confirm SMS is set up in your First Class account, by navigating to *Settings > Facility > SMS Config*.

If your account is set up, all 3 fields will show metavalue data.



Meta Key	Meta Value
TransmitSmsApiHost	https://api.trar
TransmitSmsApiKey	cd3e9f7b4234
TransmitSmsApiSecret	Huntingtower

Paying for your Burst SMS credit

To manage your Burst SMS account billing including options for auto-billing.

Step 1 - Log into your burst SMS account - <https://firstclasssoftware.transmitsms.com>

Step 2 - Click on the billing tab



Within the billing tab, add a credit card by clicking the add card option.

The screenshot shows the 'Billing Settings' section with the following options:

- Daily Top Up Limit: \$500 [Apply for Increase](#)
- Recharge Threshold: \$0.00 [Apply for Increase](#)
- Auto Credit Re-charge: Do not auto recharge (dropdown menu) Auto recharge this amount when balance drops below the recharge threshold.
- Send Balance Warning: Never (dropdown menu) Email me when balance reaches this amount.

There is an 'UPDATE' button below these settings.

The 'Credit Cards' section below shows: 'You have no cards stored with us.' with 'ADD CARD' and 'ADD CREDIT' buttons, and logos for VISA, MasterCard, and American Express.

On the right, there is a 'Transaction Security' box with the heading 'Are my details secure?' and text: 'We use global best practice security and encryption technologies when dealing with your data to ensure your safety and protection.' Below this is a link for 'ABOUT SSL CERTIFICATES'.

Step 3 - Once your card is set up you can then apply the credit to your account.

Step 4 - We highly recommend setting up an auto re-charge option to ensure there are no disruptions in your SMS service.

This can be done by using the auto credit recharge drop-down.

You may also need to adjust the recharge threshold.

Automated emails

First Class has a range of automation triggers that allow you to automate various emails.

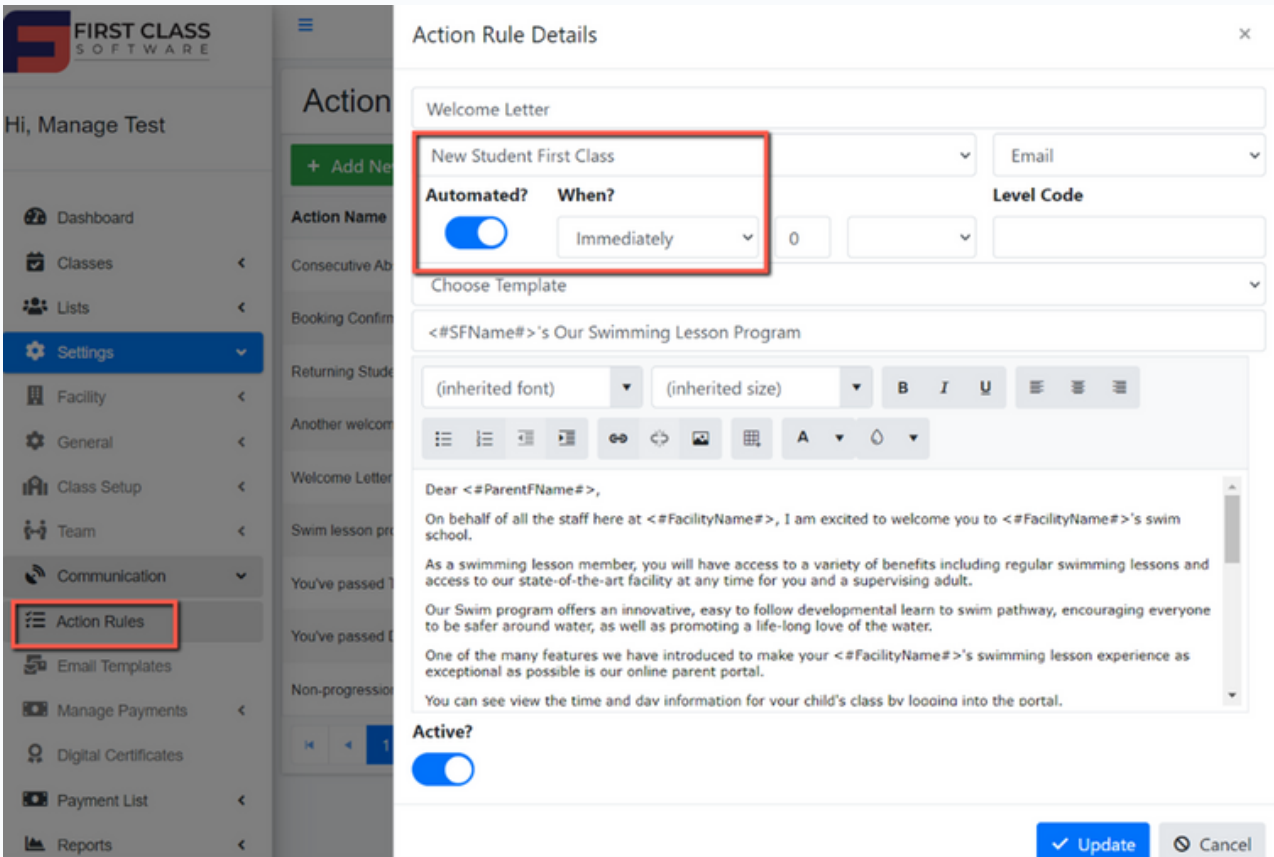
To set up automated emails go to *Settings > Communication > Action Rules*.

Within action rules, there is an action builder where you can add new action rules.

Below is a list of your current actions/rules.

To create a new action rule, open the builder, name the rule, and then choose the appropriate action trigger from the drop-down menu.

For example, the most common trigger is a new student.



Action Rule Details

Welcome Letter

New Student First Class

Automated? When? Immediately

Level Code

Choose Template

<#SFName#>'s Our Swimming Lesson Program

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Dear <#ParentFName#>,
 On behalf of all the staff here at <#FacilityName#>, I am excited to welcome you to <#FacilityName#>'s swim school.
 As a swimming lesson member, you will have access to a variety of benefits including regular swimming lessons and access to our state-of-the-art facility at any time for you and a supervising adult.
 Our Swim program offers an innovative, easy to follow developmental learn to swim pathway, encouraging everyone to be safer around water, as well as promoting a life-long love of the water.
 One of the many features we have introduced to make your <#FacilityName#>'s swimming lesson experience as exceptional as possible is our online parent portal.
 You can see view the time and dav information for your child's class by loooino into the portal.

Active?

You can then choose the type of action and the specific details around sending such as how many days before or after the trigger you want it to send.

This is where you can set up things like welcome emails or an onboarding sequence for new customers.

Notifications

Another type of communication within First Class is notifications.

Notifications are messages that can go on or inside the customer/parent portal.

The notifications show as a banner-style alert for users when they are interacting with the portal. To set up or update the notifications in your system go to *Settings > Facility - Parent Portal Notifications*.

Parent Portal Notification Banner

Meta Key	Meta Value
DashboardPage	
LoginPage	

Email Reporting

How can I view a report on the emails I've sent?

A comprehensive report on emails sent in First Class can be found within your reporting menu under email report.

How can I view a report on an SMS sent?

To view SMS reporting and activity you will need to log into your Burst SMS back end.

If you have any questions about the communication features of First Class please contact our support team on support@memberretentionsystems.com.