Social Planet

Client Management Quick Guide

Love the Local Life

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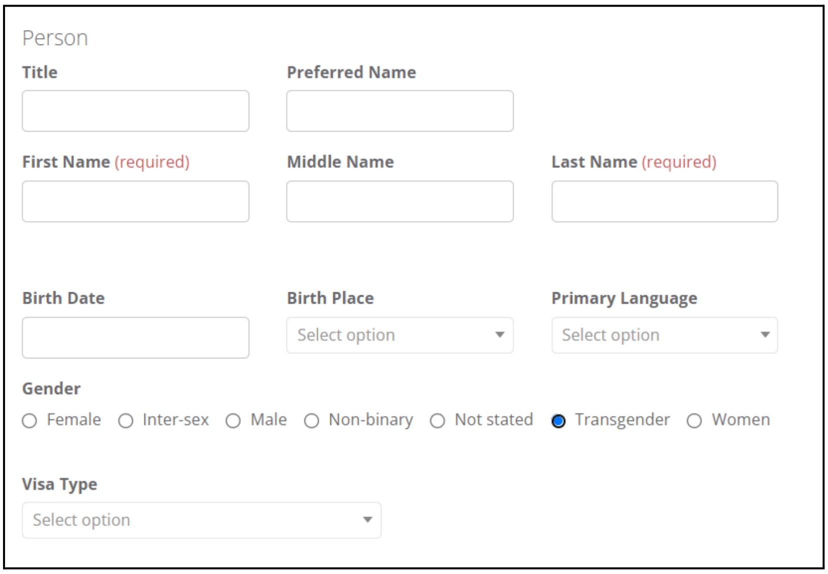
Version 2.00

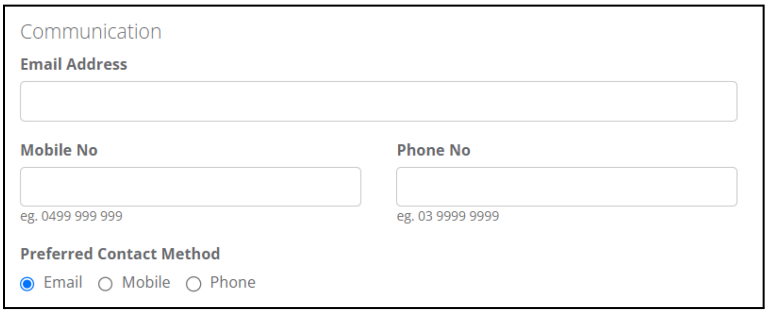
Contents

How to Create a New Client

1. From the **Frontdesk**, go to **Clients** and select **Add Client+**.
2. Fill out the relevant information in the **Person** section. Preferred name will be used in correspondence with this person.



3. Fill out the **Communication** section, it's mandatory that clients have at least one method of contact. The **Preferred Contact Method** will be highlighted with a blue tag in their client tile.

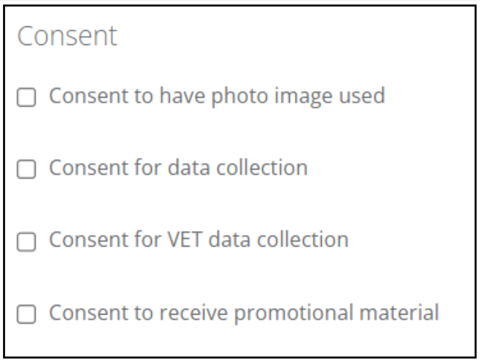


4. Fill out the **Address** section with the client's address details. The **Street Number and Address** section generates a Google Maps of their location.

5. Add an **Emergency Contact** for the client.

6. Fill out the **Support Labels**.

7. Fill out the **Consents** section which the client has agreed to.

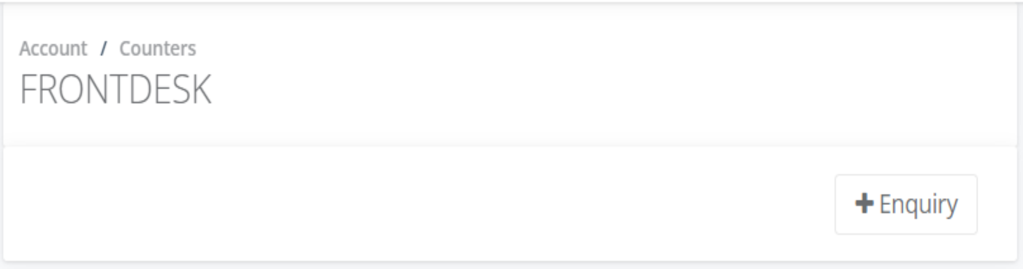


8. Finally, select the relevant marketing option for **How did they hear about us?** and a relevant **Default User Group**.
9. Click **Add Client** and hurrah! Your client has been added, and you will be automatically taken to the **Client Profile** section.

How to add an Enquiry

Record people who enquire about activities and services they'd like to be involved in. Add their details into Social Planet, so you can follow up at a later time.

1. From the **Front Desk** select **Add Enquiry**



2. Enter the person's name, contact and address details
3. Choose the Submission Type - Collect client details or Enquiry
4. Enter the Submission Source - Case Manager or GP Practice
5. The Submission Date / Time will reflect the current time, change to reflect when the Enquiry was made
6. Select the Enquiry Type - Activities and Events
7. In the Enquiry Details, enter the information summarising the request
8. If the person needs to be contacted at a future time, select Enquiry requires follow up by staff? Then enter a date and time.
9. Select from the following options to include additional information about the person

   - [ ] Include additional details like Date of Birth, Gender, Language, Visa Status, etc
   - [ ] Include emergency or alternative contact
   - [ ] Has a health care card or pensioner concession card
   - [ ] Include medical, allergy, disability, or other safety information
   - [ ] Include student enrolment fields for VET/ACFE/LearnLocal classes
   - [ ] Include evidence to verify age and citizenship status
   - [ ] Include consent authorisations

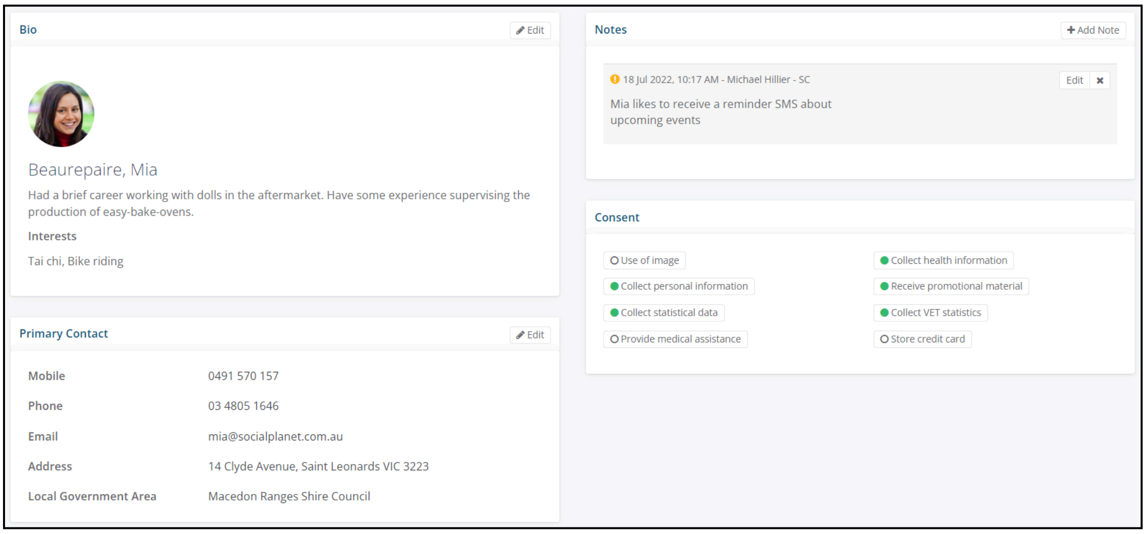
10. Once this information has been gathered you can change the enquiry into a client.

Understanding and Filling Out the Client Profile Tabs

Social Planet has found that greater participant *engagement* leads to greater participant *retention* for your activities and events. So, make sure to update your client's profile regularly with their "likes" and "needs".

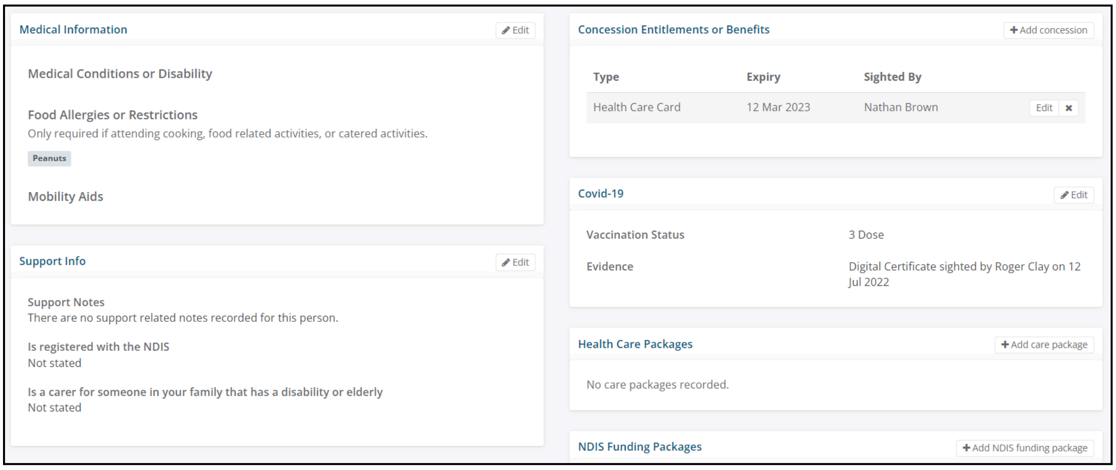
1. From the **Frontdesk**, go to **Clients** and select **Client List**.
2. Fill out the **Search Field** and select the **Edit** button on the **Client Profile** tile.
3. There are several tabs on the client profile where information about the client can be added. The more information you provide about your client, the more accurate and valuable the demographic reports for your neighbourhood house.

4. Complete all fields in the **Profile** section, as this will provide highly valuable demographic reports for your participants.



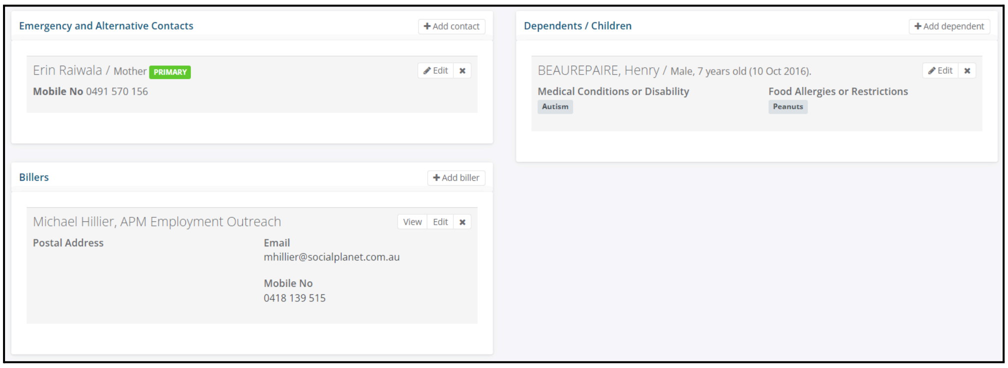
- Click **Edit** on the **Bio** section to change the client's name, bio, profile image and interests.
- Click **Edit** on the **Primary Contact** section to add phone numbers, emails and home address.
- Click **Edit** on the **Personal Info** section birth date, pronouns, gender, visa type and other demographic information.
- Click **+Add Note** to create relevant notes for staff to be made aware of a person's needs or preferences.

5. If your client has a disability, health condition, concession or receives NDIS funding, add this information in the **Support** tab.



- Click **Edit** on **Medical Information** and add their medical condition, food allergies and mobility needs
- Click **Edit** on **Support Info**
- Click +**Add concession** button, select the Concession Type, Expiry Date and the staff member that cited the Concession Card.
- Click **+Add plan** on Health and Safety Plans to add a health plan.
- Click **Edit** on the **Covid-19** section to fill out a client's vaccination status and certificate.
- Click **+Add Care Package** if the person wants to use their Commonwealth Home Care Package to pay for activities.
- Click **+Add NDIS Funding Package** if the person wants to use their National Disability Insurance Scheme funding to pay for activities.

6. To add an emergency contact, financial intermediary and dependents/children, fill out the relevant fields in the **Contacts** tab.

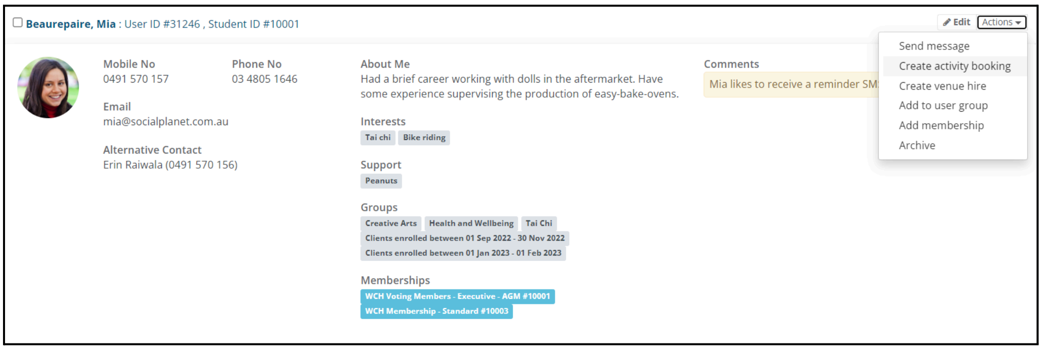


- Click **+Add contact** to the **Emergency and Alternative Contacts** section.
- Click **+Add Biller** to add a financial intermediary.
- Click **+Add dependents** to add children who are at your centre when a client is participating in an activity.

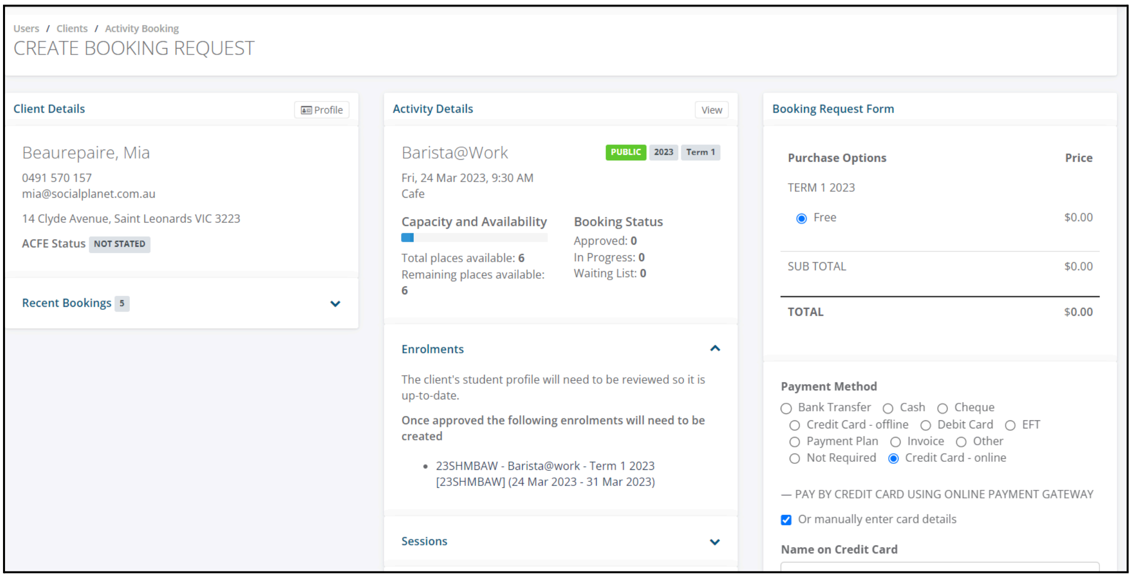
7. To update any contacts, select the **Edit** button, or **X** button to delete.
8. In the **Activities** tab, you can view the client's **upcoming activity attendance** and **past activity attendance.**
9. To see the client's history of activity payments, use the **Bookings** tab.
    - In this section is a list of booking tiles, including the **Activity Name**, **Booking Status**, **Session Allocation** and time and date of booking.
    - You can view the number of ticket sessions, and check if all tickets have been allocated.
    - When a client has paid by card, the card's last four digits will be displayed.
    - Click the **Actions** button on a **Booking** tile to –
        - Send a **pre-enrollment email**.
        - Open a **pre-enrollment form**.
        - Send a **confirmation email** for the booking.

How to Create an Activity Booking Request for a Client

1. From the **Frontdesk**, go to **Clients** and select **Client List**.
2. Fill out the **Search Field** and select the **Actions** button on the client tile, then **Create activity booking**.



3. The **Create Booking Request** page will now be open, either scroll down or **Search** for the desired activity, review its attendee capacity, then click **Continue Booking**.
   - If the client has been booked for this activity previously, the message *([Client Name] has been booking into this activity previously)* will be displayed.



4. The **Client Details** panel displays the client's name, contact and recent bookings. To review the information, click **Profile**.
5. The **Activity Details** panel displays the activity title, next session date/time, capacity and availability, booking status, recent sessions and bookings of this activity.

- If the class is pre-accredited training, there will also be an **Enrolments** tab, you ***must*** review the client's student profile to ensure it's up-to-date before confirming this booking.

6. The **Booking Request Form** panel displays the available **Purchase Options**, select one for your client. The relevant **term, ticket price, sub total, GST and total** will be displayed.
7. On the same panel, select the relevant **payment method**.
    - If **Credit Card - online**, then enter the **Name on Credit Card, Credit Card Number, CVC/Security Code** and **Billing Address**.
8. On the same panel, fill out the **Invoice using** field.
    - Either **Social Planet** or a **Third Party Invoicing System**.
    - From the dropdown menu, select a **Biller / Receipt.** If you cannot see the required biller, follow the How to Add a Biller for Third Party Payers tutorial.
    - Mark invoice as paid, if paid.
9. The final section of this panel lists the **Booking Method** and **Booking Status**, choose whether to put booking status as
    - In Progress
    - Approved
    - Place on Waiting List
10. Click **Complete Booking**, you will be taken to the **Booking Request Complete** page.
    - Confirm that the client's contact details and payment method are correct.
    - Review the **Action Messages** i.e
        - [Client] has not been allocated to required sessions
        - Enrolment records need to be created for [Client].
        - The status of this request is ready to be updated to 'Done'.

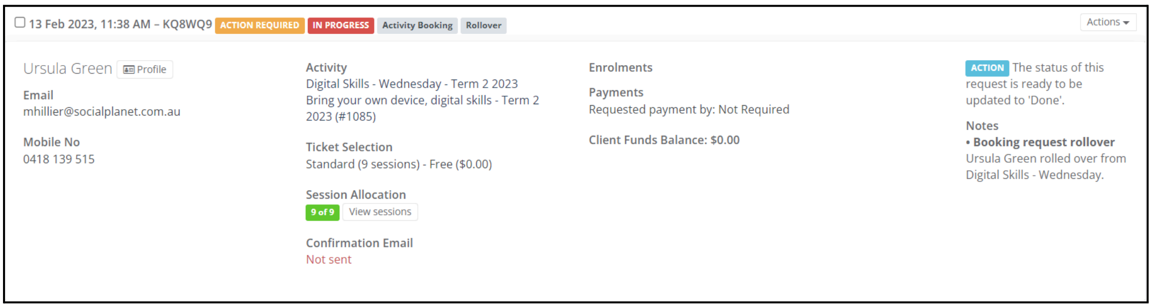
This Client's Activity Booking Request is now complete, the next steps are to allocate this client some sessions and confirm their request. To do so, follow the How to Process Booking Requests tutorial.

Note – Social Planet does not store client credit card information. It is stored securely with our payment gateway provider PinPayments. Credit card bookings attract a 3% surcharge for each booking. Invoice related payment options, such as bank transfers and on-the-day-payment are without surcharge.

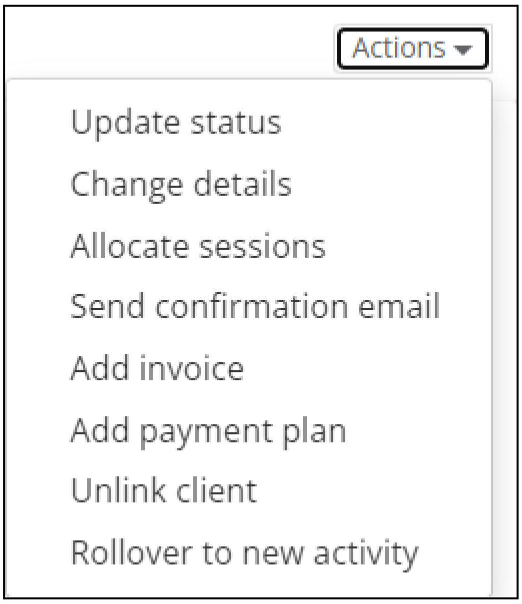
How to Process Booking Requests

Now you're aware of any booking requests coming in, it's time to approve them.

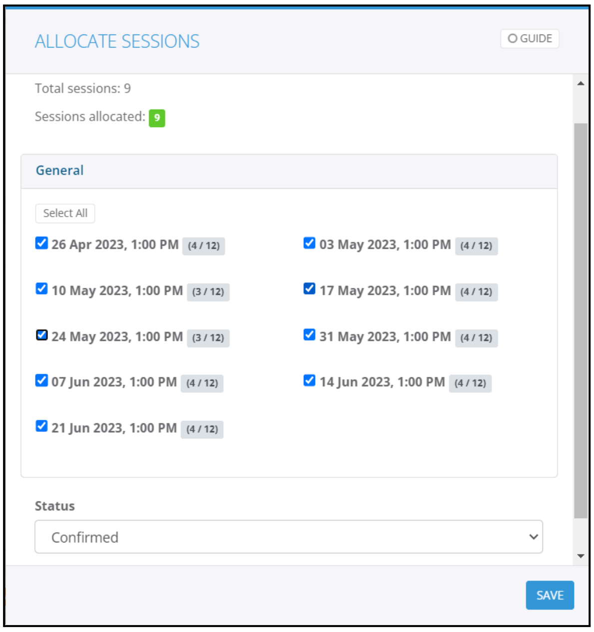
1. From the **Frontdesk**, head to the **Requests** header, click **Current.**
2. On this page is a list of **Booking Request** tiles. This includes information such as the booking ID, client name, date of booking and relevant labels such as *"New" "Expression of Interest" "Guest"* and *"Front End"*.



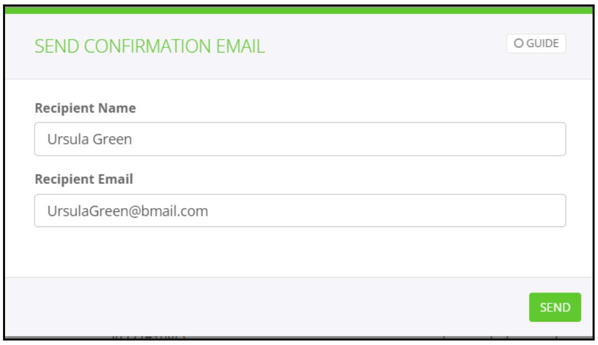
3. As we can see from the above example, several actions must be taken before the booking request has been approved. We can complete this by clicking the **Actions** button and viewing the options.



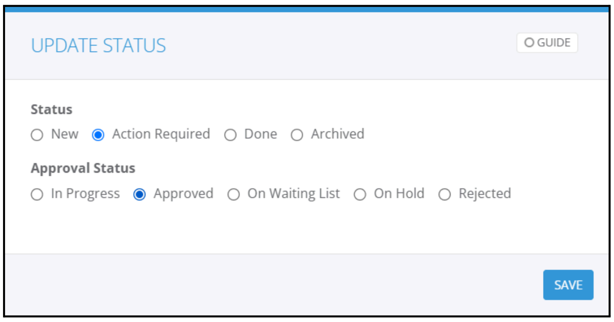
4. In the above example, we need to allocate sessions to Ms Green, which we can do by pressing **Allocate sessions**, and selecting the sessions requested, their status, and clicking Save.



5. Next, we need to send a confirmation email, which we can do from the **Send confirmation email** button.

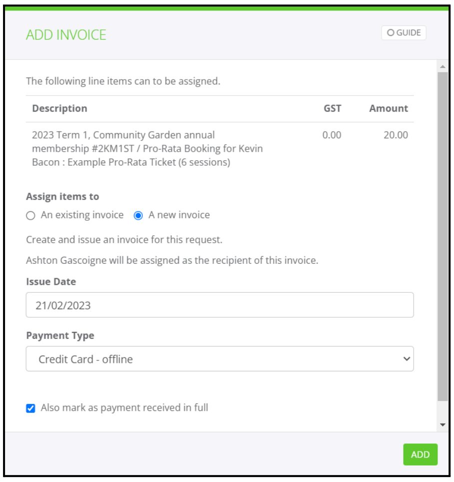


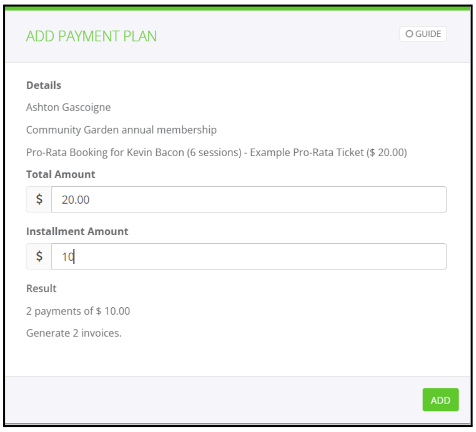
6. Finally, we can update the status of this booking from *"Actions Required"* to *"Done"* and *"In Progress"* through the **Update Status** button.

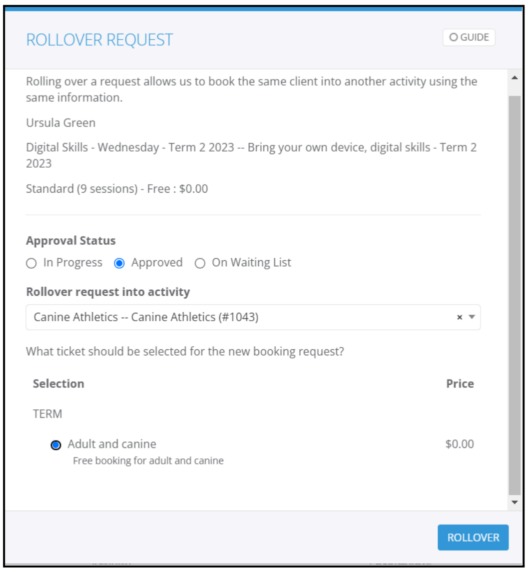


7. And we're set! Ursula Green's booking request has been approved and she's ready to begin woodworking classes. However, Ursula Green's booking request was free of charge. There are also action options for paid activities to send and

mark-off invoices, establish payment plans and rollover clients from one activity to another using the same request.

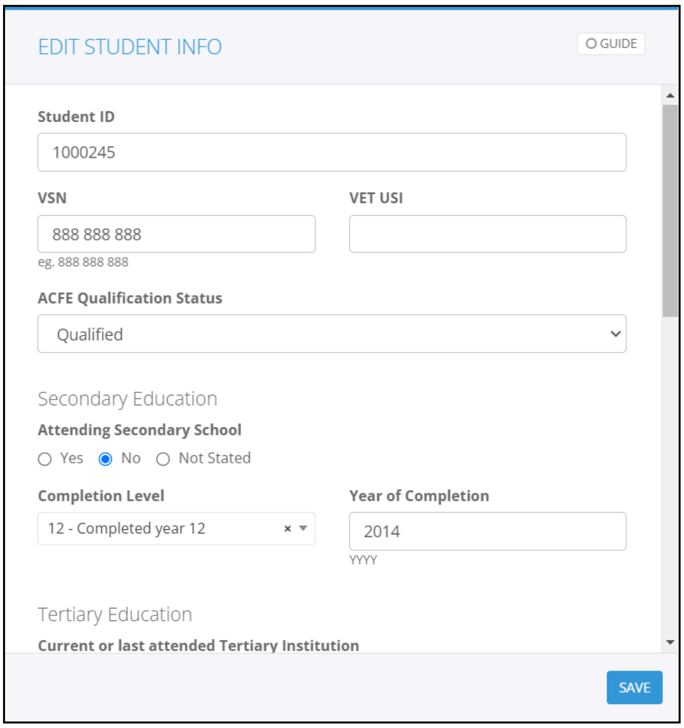






How to Update a Student's Info for AVETMISS Reporting

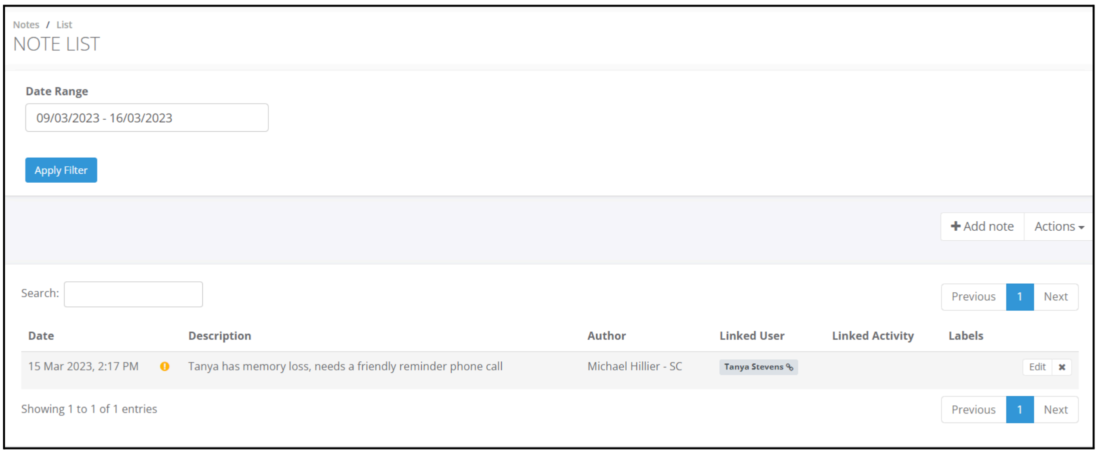
1. From the **Frontdesk**, go to **Clients** and select **Client List**.
2. Fill out the **Search Field** and select the **Edit** button on the **Client Profile** tile.
3. Scroll down to the **Student Info** tile and click **Edit**. In this section, you can –
    - Assign a unique **Student ID.**
    - Add the client's **VSN**, the unique student ID for all Victorian students in school or vocational training from Prep to 24 years old.
    - Add the client's **VET USI**, the unique ID assigned to all Australians who attend vocational education or training.
    - Add the client's **ACFE Qualification Status**.
    - Add the client's **Secondary Education** status, date of completion etc.
    - Add the client's **Tertiary Education** status, including their institution and **Australian equivalent** of an **international qualification** they have received.
    - Add the client's **Study Reason**.
    - Add the client's **Labour Force Status**, **Industry** and **Occupation**.
    - Add the client's **Survey Status,** and identify reasons to exclude clients from the Student Outcomes Survey.



4. Press **Save**, and you're done!

How to View and Add Client Notes

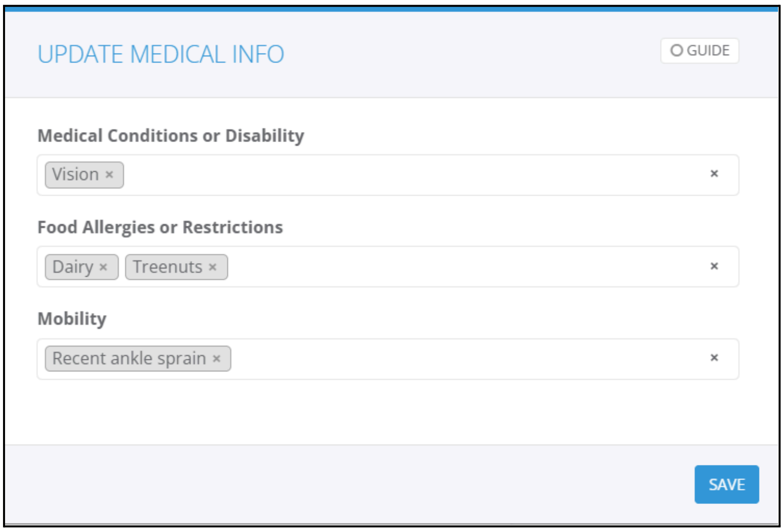
1. From the **Frontdesk**, go to **Notes** and select **Notes List**. Notes appear in chronological order.



2. To find a note, enter the note's title or the tag name in the **Search Field.**
3. The **Notes** table displays notes by *Date, Description, Author, Linked User, Linked Activity* and *Labels*.
4. Click **Edit** to update the note or **X** to delete the note.

How to Add a Client's Medical and Support Needs

1. From the **Frontdesk**, go to **Clients** and select **Client List**.
2. Fill out the **Search Field** and select the **Edit** button on the **Client Profile** tile.
3. In the **Support** tab, go to the **Medical Information** tile, click **Edit**.
4. Use the drop down menus to enter the client's **Medical Conditions or Disability**, **Food Allergies or Restrictions** and **Mobility** needs. You may also type a custom entry.

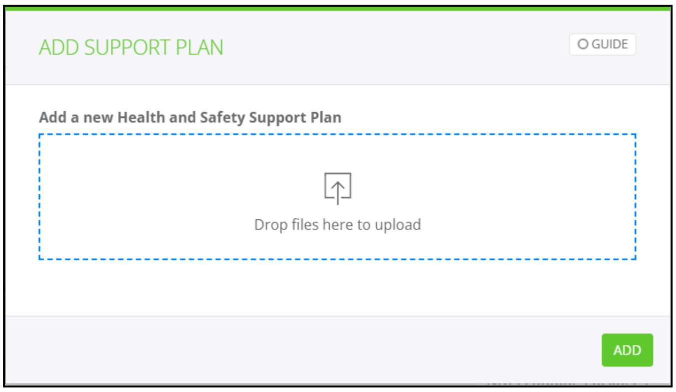


5. Support information will appear in the client's tile, and will also be displayed in the **Attendee** tab for staff to view.

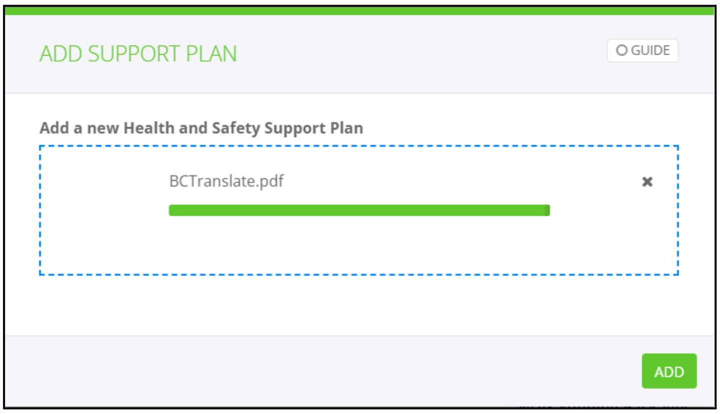
How to Upload a Client's Emergency Health Plan

If a client has a life-threatening health condition, it's required to upload an **Emergency Plan** for staff to follow.

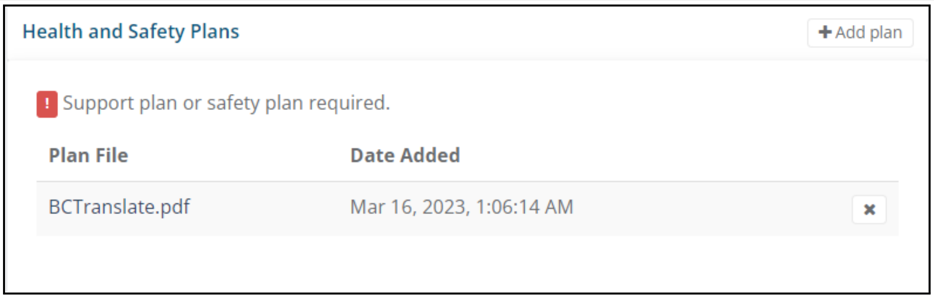
1. From the **Frontdesk**, go to **Clients** and select **Client List**.
2. Fill out the **Search Field** and select the **Edit** button on the **Client Profile** tile.
3. In the **Support** tab, scroll to the **Health and Safety Plan**, click **+Add Plan** to open the **Add Support Plan** panel.
4. You may drop or select *PDF* or *Word* format files in this box to upload, then select **Add.**



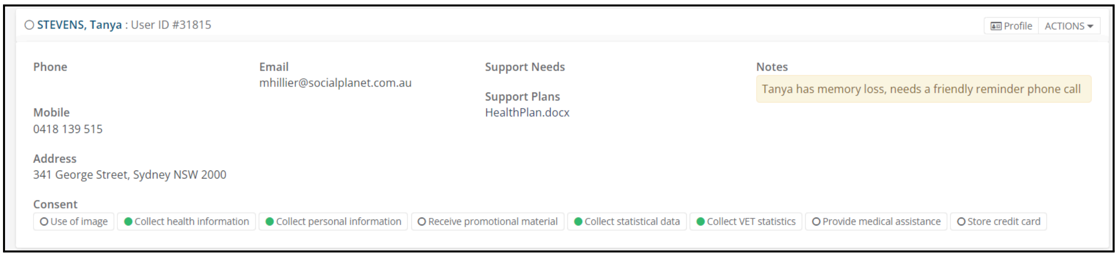
5. The title and format type will be displayed. The green upload bar informs you that the upload is successful.



The plan will be displayed an alert on the **Health and Safety Plan** panel. Staff can click on the file name to open this document.



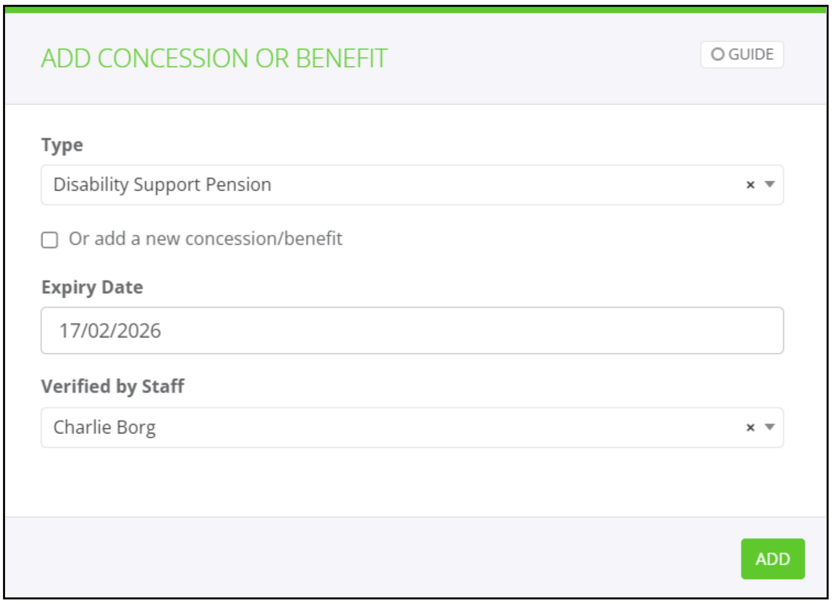
In the **Attendee** tab of an **activity**, staff can view and open the support plan for the client if they have been allocated sessions.



How to Add a Client's Concession (Healthcare Card)

It's essential to add a client's concession to their profile for AVETMISS reporting, it ensures Learn Local providers receive their additional government funding.

1. From the **Frontdesk**, go to **Clients** and select **Client List**.
2. Fill out the **Search Field** and select the **Edit** button on the **Client Profile** tile.
3. In the **Support** tab, go to the **Concession Entitlements or Benefits** tile and select **+Add concession**.
4. The **Add Concession or Benefit** panel is now displayed, here, you can -
   - Choose the client's benefit or concession from the dropdown list.
   - Add a new concession/benefit if unlisted in the dropdown list.
   - Add concession **Expiry Date**.
   - Select the staff member who has verified this concession.



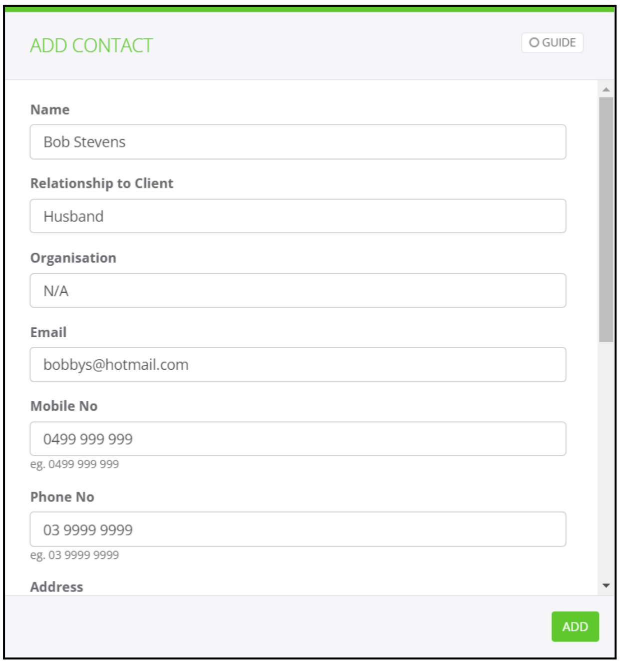
5. Click **Add** to confirm the concession.

Now the entitlement has been confirmed, it will be added to the **Concession Entitlements or Benefits** tile, click **Edit** to make changes or **X** to delete the concession.

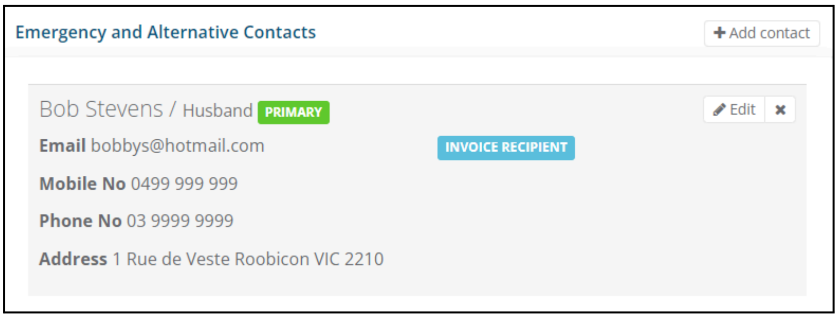
To upload evidence of this client's concession, such as a Medicare card, go to the **Files** tab of the client, click **+Add Document.**

How to Add a Client's Emergency Contact

1. From the **Frontdesk**, go to **Clients** and select **Client List**.
2. Fill out the **Search Field** and select the **Edit** button on the **Client Profile** tile.
3. In the **Support** tab, go to the **Emergency and Alternative Contacts** tile and select **+Add contact**.
4. The **Add Contact** window will be displayed, here, you can enter the emergency contact's –
    - Name
    - Relationship to Client i.e Partner, Case Manager, Parent
    - Organisation (if relevant)
    - Contact methods
    - Address



5. You may also tick whether this is the client's primary contact or financial intermediary. If they are the intermediary, tick **Invoices should be sent to this person** and fill out the **Invoice Address**.
6. Press **Add**, and voila! The emergency contact will be found in this panel in future.



How to Add a Client's Dependent Children

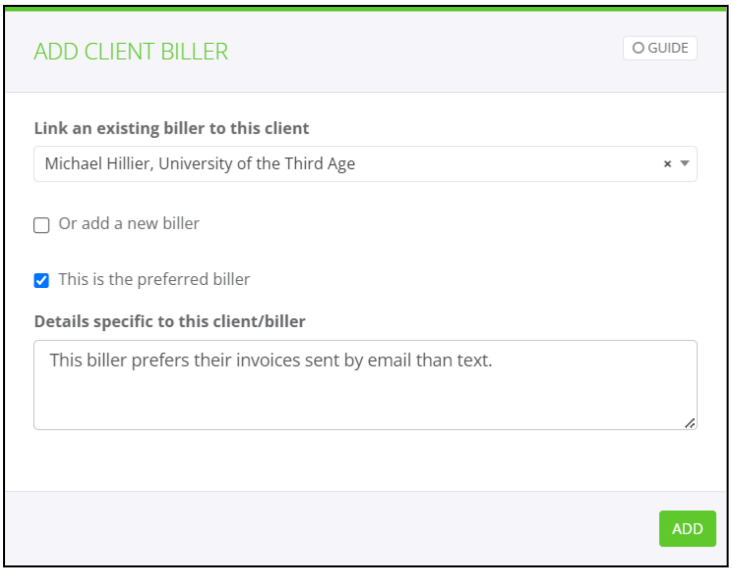
If you provide childcare for clients attending your activities. Add this information to the client's profile.

1. From the **Frontdesk**, go to **Clients** and select **Client List**.
2. Fill out the **Search Field** and select the **Edit** button on the **Client Profile** tile.
3. In the **Support** tab, go to the **Dependents / Children** tile and select **+Add dependent.**
4. The **Add Dependent** window will be displayed, here, you can enter the dependent's –
    - Name
    - Birthdate
    - Gender
    - Medical Conditions and Allergies
    - Additional Comments
5. Click **Add**, and in future, the dependent's information will be found at this tile.

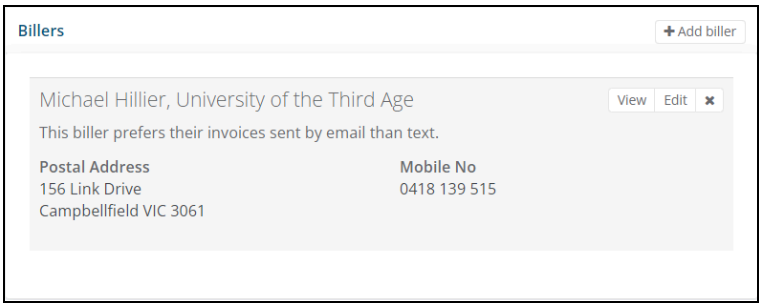
How to Add a Biller for Third Party Payers

If a third-party intermediary is paying the client's activity costs, here's how to set them up as a biller

1. From the **Frontdesk**, go to **Clients** and select **Client List**.
2. Fill out the **Search Field** and select the **Edit** button on the **Client Profile** tile.
3. In the **Support** tab, go to the **Biller** tile and select **+Add biller.**
4. The **Add Client Biller** window will be displayed. Here you may either **link an existing biller to this client** or **add a new biller** by listing their details.



5. If necessary, tick **This is the preferred biller** and add relevant personal details.
6. Click **Add** to confirm. In the future, this information can be found at the **Billers** tile.



How to View a Client's Past and Upcoming Activities

1. From the **Frontdesk**, go to **Clients** and select **Client List**.
2. Fill out the **Search Field** and select the **Edit** button on the **Client Profile** tile.
3. In the **Activities** tab, you can view the client's past and upcoming activities.

Upcoming activity attendance

Show 10 entries Search:

Status	Activity	Date	Attendance
●	Digital literacy for employment	Wed, 22 Mar 2023, 10:00 AM	○
●	Barista@Work	Fri, 24 Mar 2023, 9:30 AM	○
●	Digital literacy for employment	Wed, 29 Mar 2023, 10:00 AM	○
●	Digital literacy for employment	Wed, 05 Apr 2023, 10:00 AM	○

Showing 1 to 4 of 4 entries Previous 1 Next

Past activity attendance

Show 10 entries Search:

status	Activity	Date	Attendance
●	Digital literacy for employment	Wed, 01 Feb 2023, 10:00 AM	✔
●	Digital literacy for employment	Wed, 08 Feb 2023, 10:00 AM	○
●	Digital literacy for employment	Wed, 15 Feb 2023, 10:00 AM	○
●	Digital literacy for employment	Wed, 22 Feb 2023, 10:00 AM	○
●	Digital literacy for employment	Wed, 01 Mar 2023, 10:00 AM	○
●	Digital literacy for employment	Wed, 08 Mar 2023, 10:00 AM	○
●	Digital literacy for employment	Wed, 15 Mar 2023, 10:00 AM	○

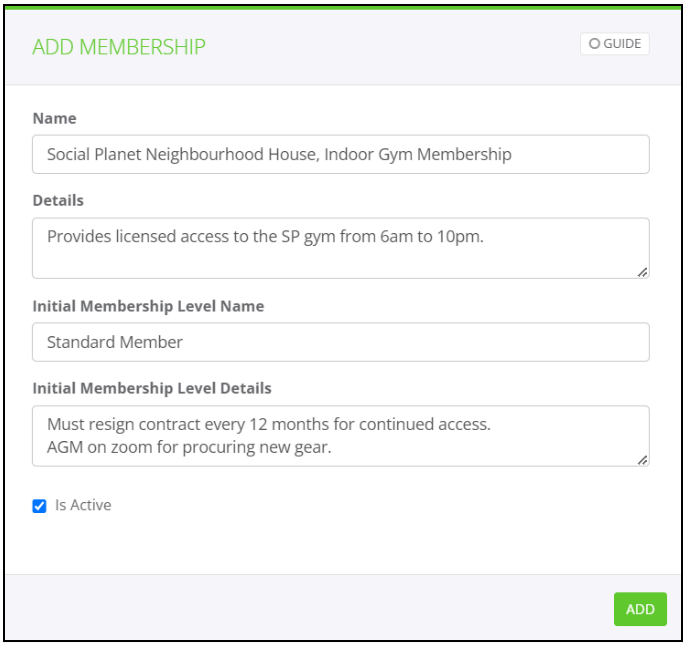
Showing 1 to 7 of 7 entries Previous 1 Next

How to Create and Assign Membership to a Client

Memberships are a *highly valuable* tool for increasing engagement with your centre. What's more, this tool is essential for incorporated associations required to manage an active membership list for AGMs and other meetings.

First, here's how to set up your organisation's membership program on Social Planet.

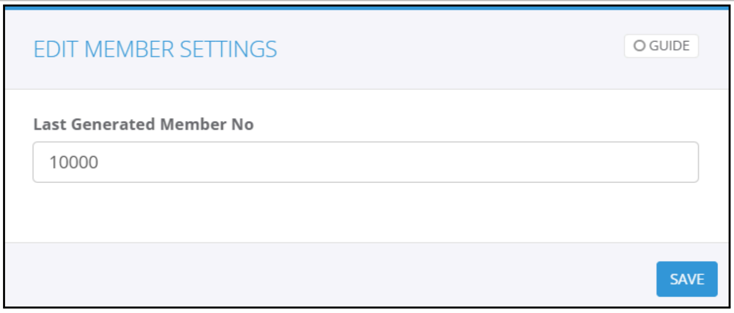
1. From the **Frontdesk**, go to **Clients** and select **Memberships**.
2. Click **+Add Membership**.
3. The **Add Membership** window will be displayed, here you can add –
    - Name
    - Details
    - Initial Membership Level Name i.e "Voting Members"
    - Initial Membership Level Details i.e meeting dates and responsibilities



4. **Is Active** should remain ticked for this membership to be available for clients.
5. Click **Add** to create your program.

Now, we need a system to assign a unique membership number to each participating client.

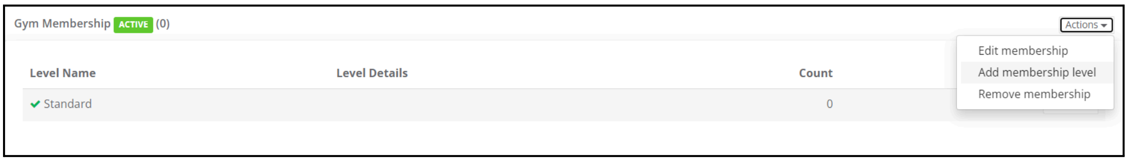
1. From the **Frontdesk**, go to **Accounts** and select **Settings**.
2. On the **Member settings** panel, click **Edit**. The **Edit Members Settings** window will be displayed.



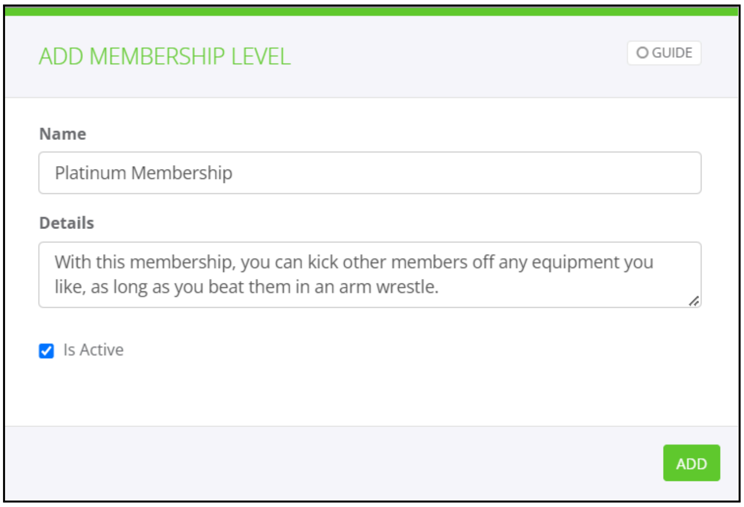
3. Enter a **Last Generated Member No** i.e 10000, each new member will be given an automatic number greater than this *and* the previous member's number. i.e 10001, 10002 10003...

Before we assign clients to our membership, we may want additional levels to the program.

1. From the **Frontdesk**, go to **Clients** and select **Memberships**. The previously created membership program is now displayed as a tile.



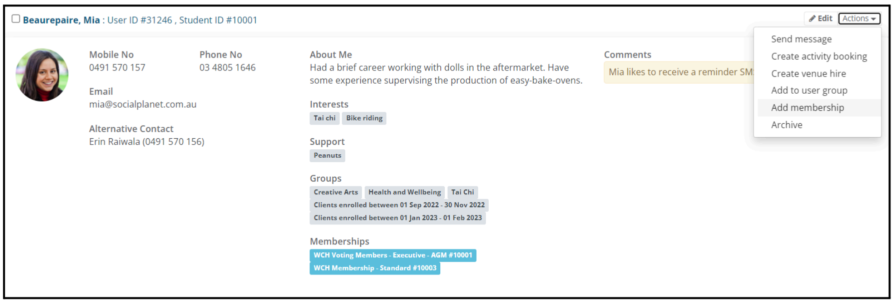
2. Click **Actions**, then **Add Membership Level.** The **Add Membership Level** window will be displayed. Here, you can –
   a. Add a membership **Name**
   b. Additional **Details** about this level.



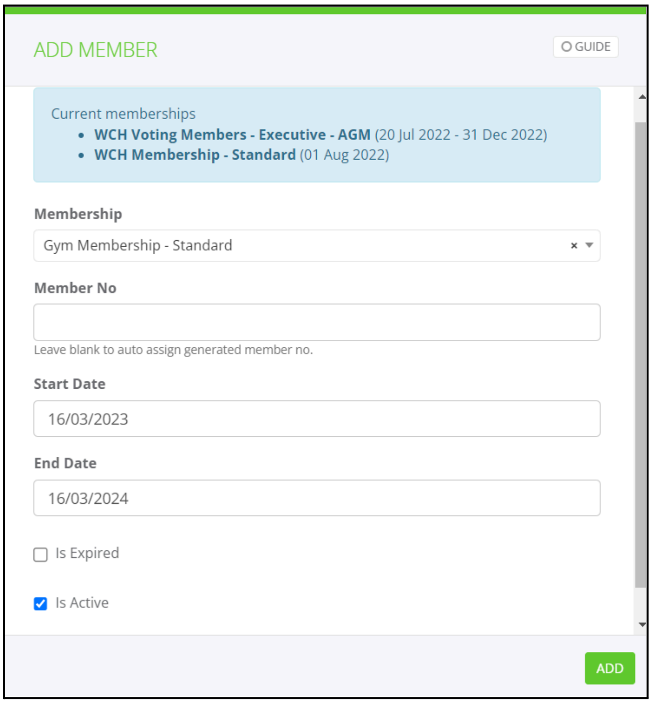
3. Click **Add**, and we are finally ready to assign some clients!

Here's how to assign clients to the membership program.

1. From the **Frontdesk**, go to **Clients** and select **Client List**.
2. Fill out the **Search Field** and select the **Actions** button on the client tile, then **Add membership**.



3. The **Add Member** window will be displayed, here, you can –
   - Select the relevant **Membership** and level.
   - Add a membership **Start and End Date**.
   - Select **Is Active** or **Is Expired**.



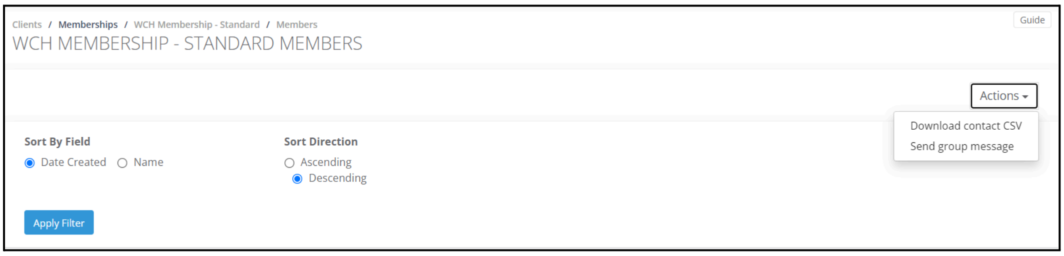
4. Click **Add** and there you have it. A tiered membership program with a client base!

How to View Membership List, Send Messages, Delete Clients and Book Activities

Here's how to view your members' contact details, send them a message or individually book them for activities.

1. From the **Frontdesk**, go to **Clients** and select **Memberships**.
2. On the relevant **membership** tile, select the **Actions** button next to the relevant **Level Name**, then **View Members.**

3. All the members assigned to this membership list are now displayed. If we click the whole-page **Actions** button we can –
   - **Download Contact CSV file.**
   - **Send a group message**.

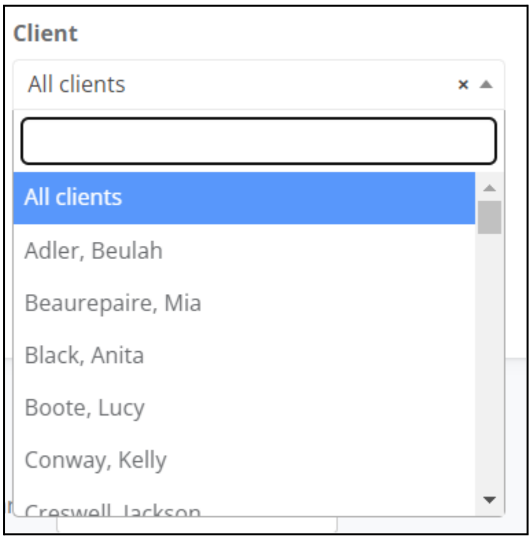


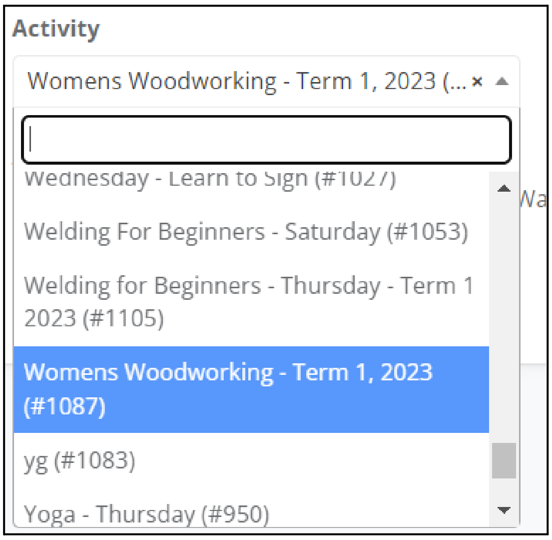
4. We can click the **Actions** button on each individual's tile and –
   - **Create activity booking**, as we would from the **Client List**.
   - Send an individual **message**.
   - **Remove** the client from the membership list.

How to Use “Requests View” and Process Online Bookings

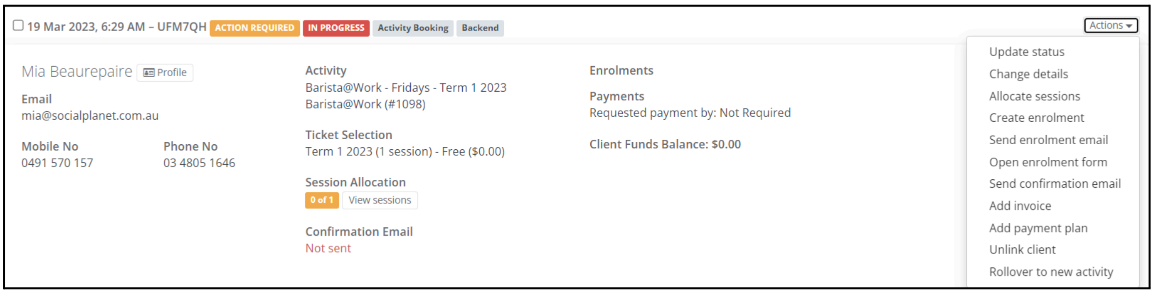
Here’s how to process front-end online bookings that need to be confirmed manually.

1. From the **Frontdesk**, go to **Requests** and select **Current**.
2. Requests can be filtered by **Client** or **Activity**. And further filtered by **Status** and **Approval Status**.





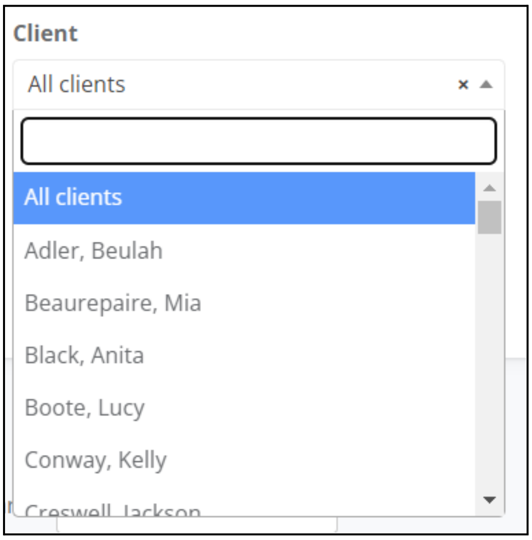
3. To find recently booked clients, select **New**.
4. From the **client** tile, you can complete all the required actions to process the booking such as –
    - Linking a client booking to a profile
    - Allocating sessions
    - Adding invoices

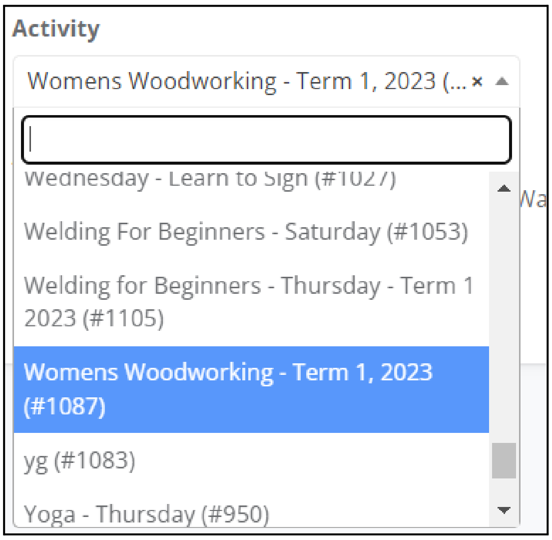


How to Manage a Client's Participation Status

If a client goes on holiday, needs to be placed on a waitlist or is an unsuitable fit for an activity, their status must be changed through the Activity Request Tab.

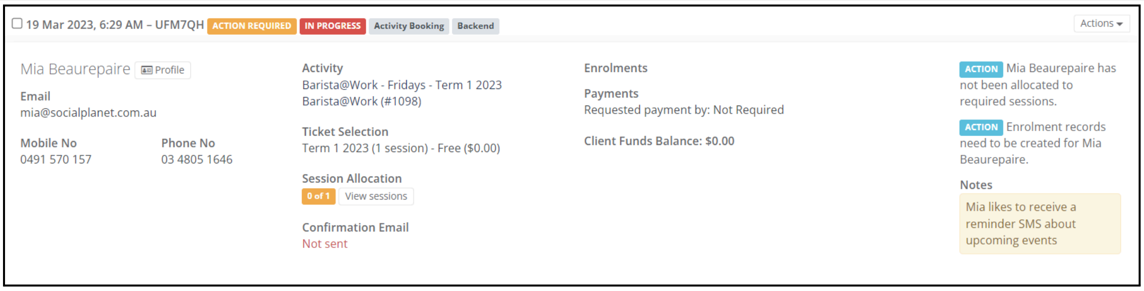
1. From the **Frontdesk**, go to **Requests** and select **Current**.
2. Requests can be filtered by **Client** or **Activity**. And further filtered by **Status** and **Approval Status**.



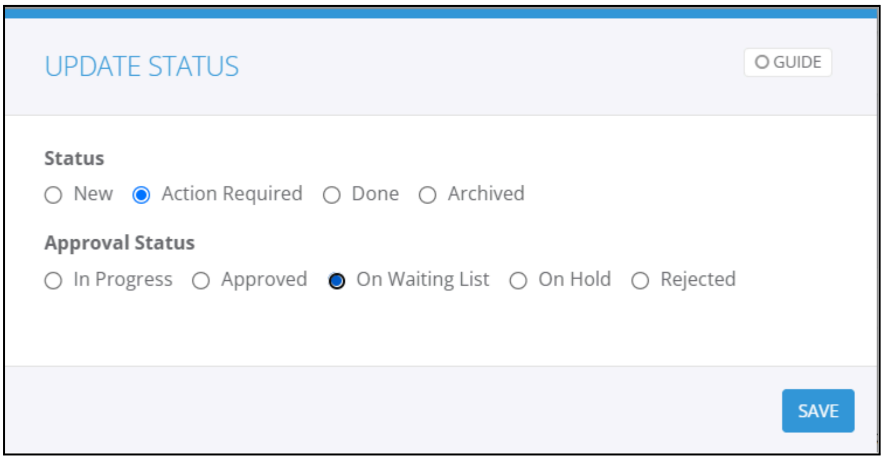


3. The client's tile will have a tagged **Status**, and **Approval Status**.
   - **Status** type
     - **New** - If a client completes an online booking.
     - **Action Required** - If a staff member books on behalf of a client.
     - **Done** - If all tasks have been completed.
     - **Archived** - If the client has been removed from the activity booking list.
   - **Approval Status** type
     - **In Progress** - If staff need to review the booking.
     - **Approved** - If a client is approved to attend.
     - **On Waiting List** - If an activity is overbooked.
     - **On Hold** - If the client is unable to attend.
     - **Rejected** - If the client is removed from the activity.

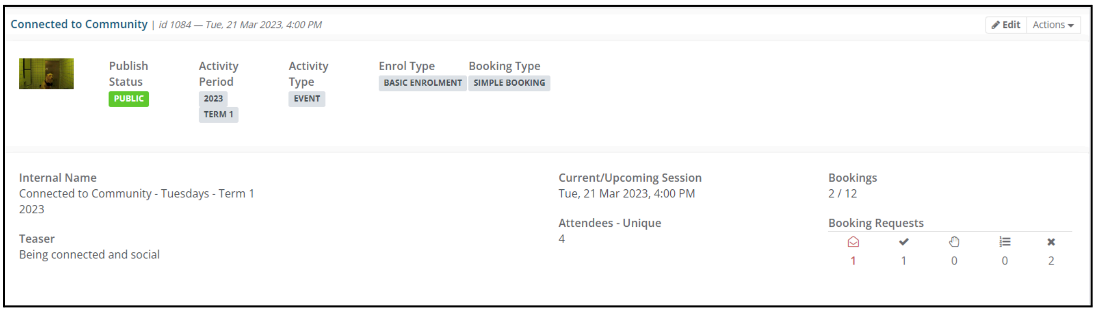
4. For example, this client was booked by a staff member, and needs to be reviewed, their status and approval status are **Action Required** and **In Progress** respectively.



5. However, say the client is unable to attend, we can click **Actions**, then **Update status** to reflect this change, then click **Save**.



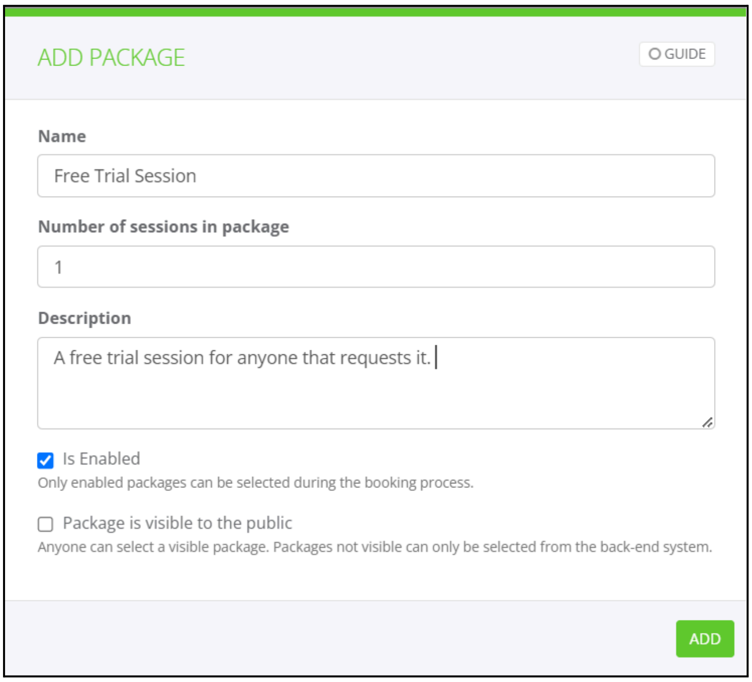
The status of all **booking requests** for an activity can be found in the bottom-right hand corner of the activity tile.



How to Support a “Free Trial Session” for Interested Participants

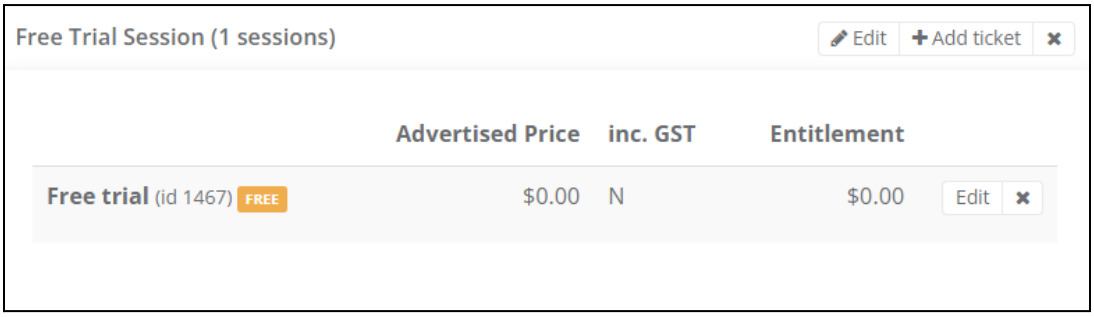
Here’s how to set-up a “free trial session” participants can attend before they commit to paying for a full term.

1. From the **Frontdesk**, head to the **Activities** header, click **Current** and then **Edit** on the activity of your choice.
2. Select the **Settings** tab, then click the **+Add Package** button above the **Ticket Packages** panel to create a new ticket package.
3. In the **Add Package** window, fill out the following information.
    - A **name** that is some form of “*Free Trial Session*”.
    - 1 for **Number of sessions in package**.
    - Leave **Is Enabled** ticked.
    - Do not tick **Package is visible to the public**, this package is staff-only.
    - Click **Add**.



4. Next, click +**Add Ticket**, on the newly created ticket package. This will open the **Add Ticket** window, fill out the following information.
    - Select **Ticket Type -** “Free”
    - **Name** the ticket along the lines of “free trial”.
    - Leave **Is Enabled** ticked.
    - Click Add.

Voila! Your free trial session ticket is now available for booking.



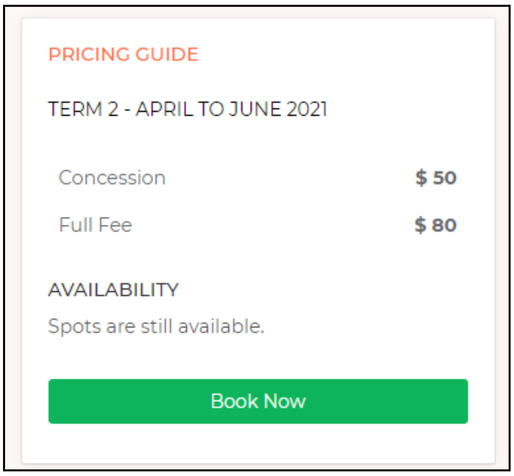
To book a client into this activity with the free-trial ticket, follow the [How to Create an Activity Booking Request for a Client] tutorial. Once the client has attended the free trial and would like to pay –

1. Find the client's free-trial booking through the **Requests** tab,
2. Click **Actions**, then **Update status**, select **Archived** and **Rejected**.
3. Rebook the client with a paid ticket package.

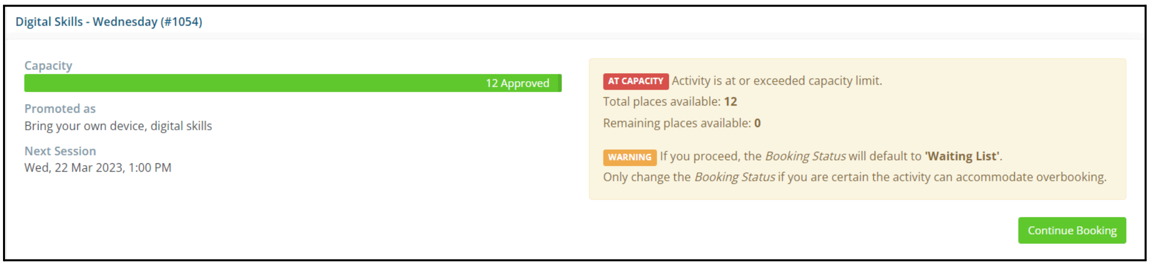
How to Set Attendee Capacity for Your Activity

1. When you first create an activity, you set the attendee capacity in section **1. Key Information.**

2. Social Planet displays different **Availability** statuses on the landing page to encourage participation.
    - **Spots are still available.** – When an activity is first published.
    - **Selling fast.** – When 50% of tickets are sold
    - **Low, only a few spots still available.** – When 75% of tickets are sold.
    - **Sold Out** – No tickets available.
        - The Sold Out tag will be displayed with the following message *"Register your interest if you want to be notified of any future availability for this event or similar activities."*



3. If you attempt a backend client booking for a fully booked activity, the following message will be displayed.



4. If you click **Continue Booking**, the following warning will appear in the **Activity Details** panel.

ATTENTION Activity is at or exceeded capacity limit. Booking Status defaulting to 'Waiting List'.

5. In the **Booking Request Form,** the booking status will be set to **Place on Waiting List.**

Booking Status

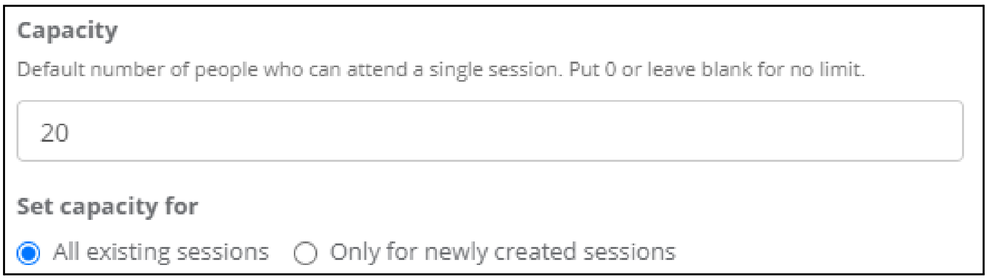
○ In Progress ○ Approved ◉ Place on Waiting List

NOTE This booking request will be recorded and client will be placed on the waiting list. When a place becomes available this request can then be approved.

How to Override the Attendee Capacity for Your Activity

To override the original attendee capacity for your activity –

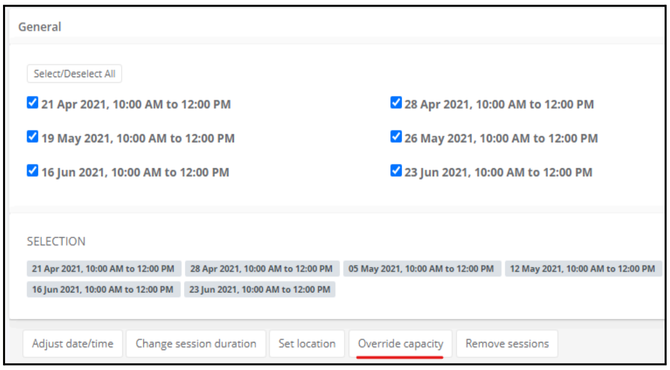
1. From the **Frontdesk**, head to the **Activities** header, click **Current** and then **Edit** on the activity of your choice.
2. Click **Edit** on the **Basic Info** panel, and change **Capacity** to your new attendee limit.
3. Then, select whether to **Set capacity for**
   - All existing sessions
   - Only for newly created sessions



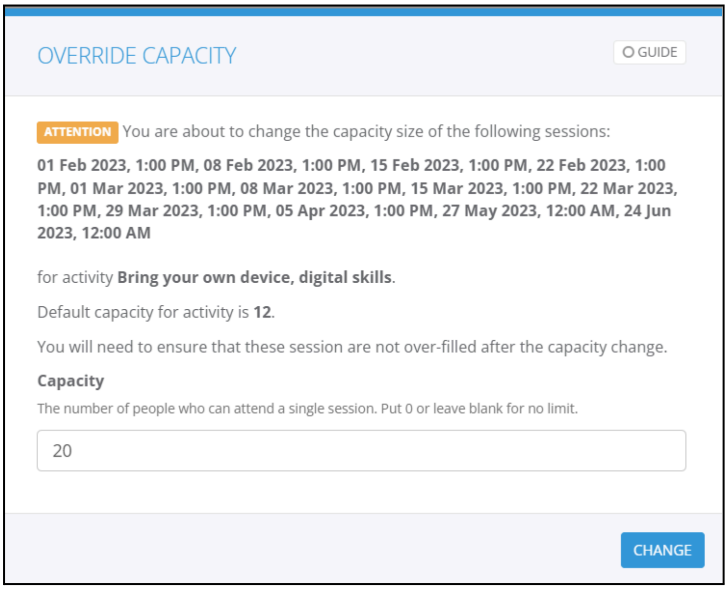
4. Click **Save**, and you're done!

There is an alternate method to override the attendee capacity through the **Sessions** tab of the activity.

1. On the **Sessions** tab, tick all sessions which you wish to change the capacity of, then click **Override capacity**.



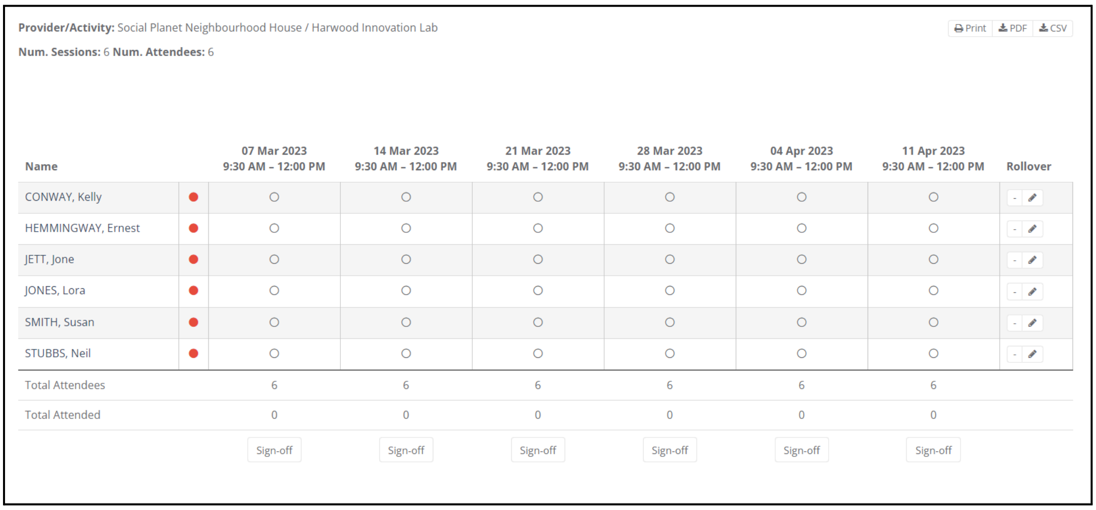
2. Enter the new **Capacity** for the activity and select **Change**



3. Press **Change**, and you're done all over again!

How to Sign-Off an Attendance List

1. From the **Frontdesk**, head to the **Activities** header, click **Current** and then **Edit** on the activity of your choice.
2. Go to the **Attendee Sheet** tab
3. Set **From** and **Until** dates to capture all sessions within this timeframe for your attendance list. **OR** find a specific student by searching the **Student** dropdown list.



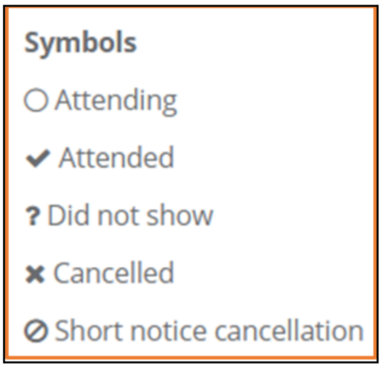
Provider/Activity: Social Planet Neighbourhood House / Harwood Innovation Lab

Num. Sessions: 6 **Num. Attendees:** 6

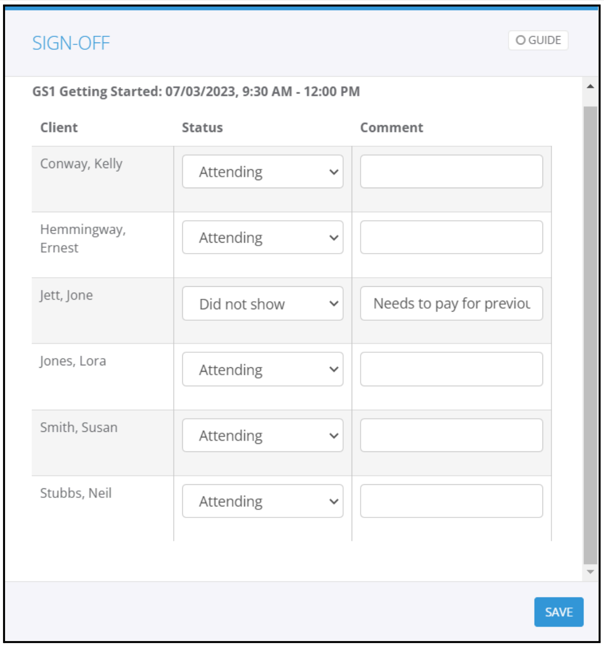
Print | PDF | CSV

Name		07 Mar 2023 9:30 AM – 12:00 PM	14 Mar 2023 9:30 AM – 12:00 PM	21 Mar 2023 9:30 AM – 12:00 PM	28 Mar 2023 9:30 AM – 12:00 PM	04 Apr 2023 9:30 AM – 12:00 PM	11 Apr 2023 9:30 AM – 12:00 PM	Rollover
CONWAY, Kelly	●	○	○	○	○	○	○	-
HEMMINGWAY, Ernest	●	○	○	○	○	○	○	-
JETT, Jone	●	○	○	○	○	○	○	-
JONES, Lora	●	○	○	○	○	○	○	-
SMITH, Susan	●	○	○	○	○	○	○	-
STUBBS, Neil	●	○	○	○	○	○	○	-
Total Attendees		6	6	6	6	6	6	
Total Attended		0	0	0	0	0	0	
		Sign-off	Sign-off	Sign-off	Sign-off	Sign-off	Sign-off	

4. Click **Update**.
5. There are several buttons you can use to copy this list.
    - **Print -** To print this document.
    - **PDF** - To download as a PDF.
    - **CSV** - To download as a CSV.
6. To mark attendance, click the circle next to the participant's name. Use the symbol guide below to mark this student's attendance status.



7. Once the attendance has been filled, press **Sign-off**, this will open the **Sign-off** window, where additional comments can be made.



8. Press **Save**.

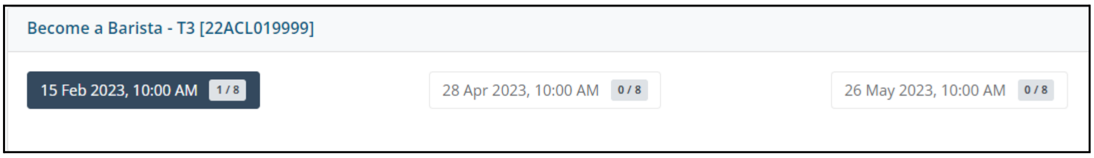
Trainers can also complete this process, the system will timestamp and include the name of the trainer who signed-off the attendance list.

How to Copy Attendants into a New Activity Session

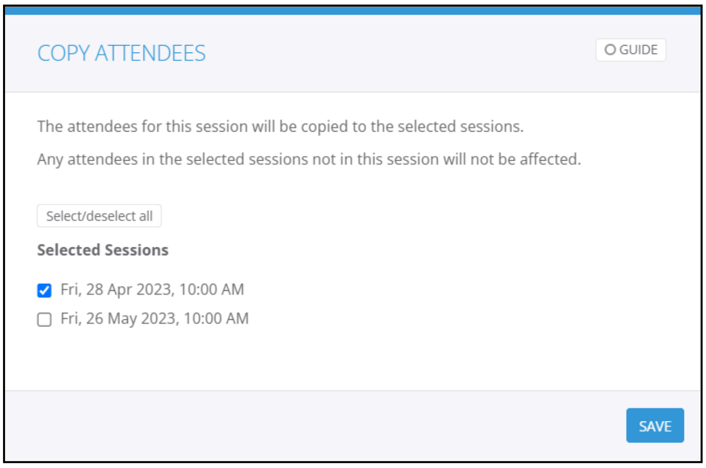
Here's how to copy your attendees into a new session.

1. From the **Frontdesk**, head to the **Activities** header, click **Current** and then **Edit** on the activity of your choice.
2. Select the **Sessions** tab, then click **+Add sessions**. Follow the How to Add New Sessions to an Activity tutorial.

3. Go to the **Attendees** tab and click the already booked session.



4. Click the **Actions** button on the right-hand side, then **Copy Attendees to**. This opens the **Copy Attendees** window.

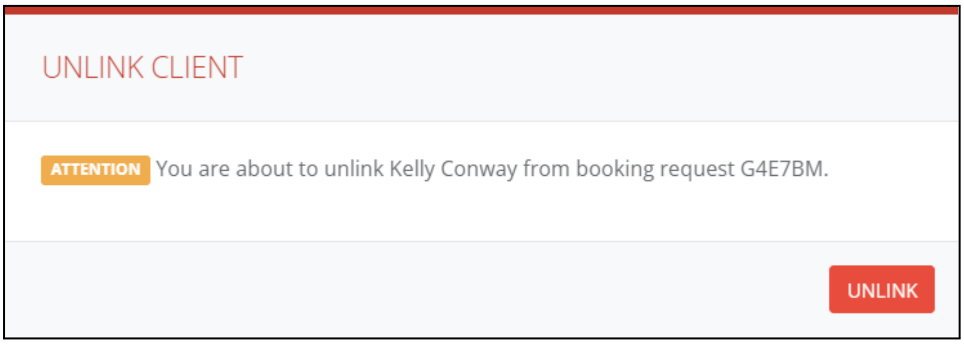


5. Choose the new session, then press **Save**!

How to Unlink a Client from an Activity Booking

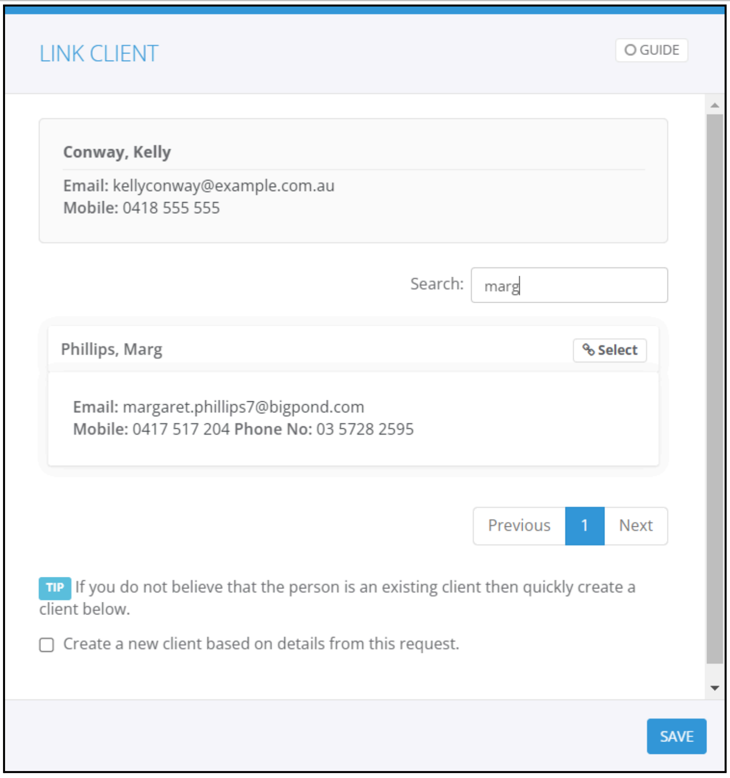
Occasionally, a booking may be made for the wrong client, such as if a mother books herself instead of her child for a class. To fix this, unlink the request from the client. Then, either link the request to the correct, pre-existing client OR create a new client to link this request to. Here's how

1. From the **Frontdesk**, head to the **Activities** header, click **Current** and then **Edit** on the activity of your choice.
2. Select the **Requests** tab, enter the *currently* booked client into the **Search** field.
3. On the client tile, click **Actions**, then **Unlink Client.** The following message will appear.

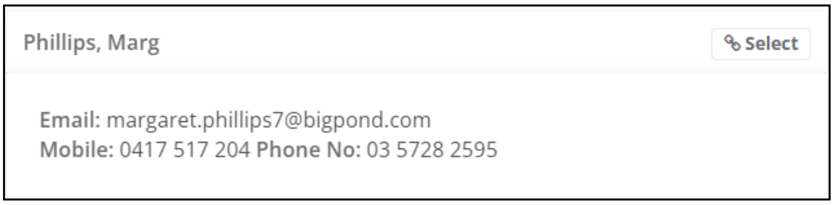


4. Click **Unlink**.
5. On the client tile, the tag next to the client's name will now read *not linked*. **Click** this tag to proceed to the **Link Client** window.

6. In the **Link Client** window, use the **Search** field to find the correct client's name. The search box can be used to find client's based on
   - Name
   - Email
   - Birthdate
   - Mobile No.
   - Phone No.



7. Once you identify the client, click **Select**, then **Save**. You've successfully linked the correct client.

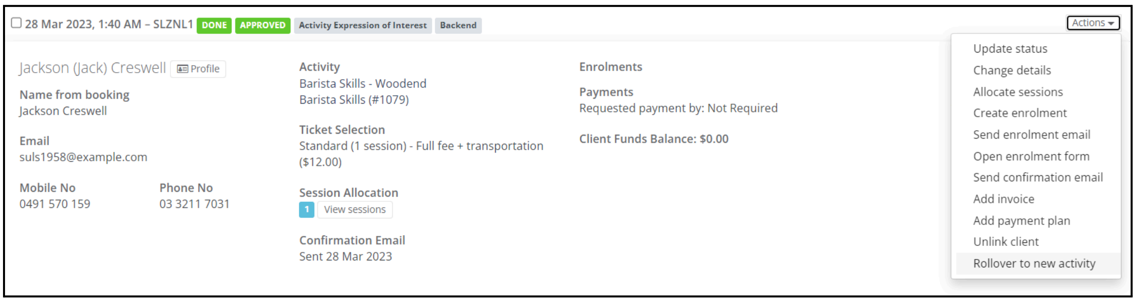


How to Roll a Client's Booking from Term to Term

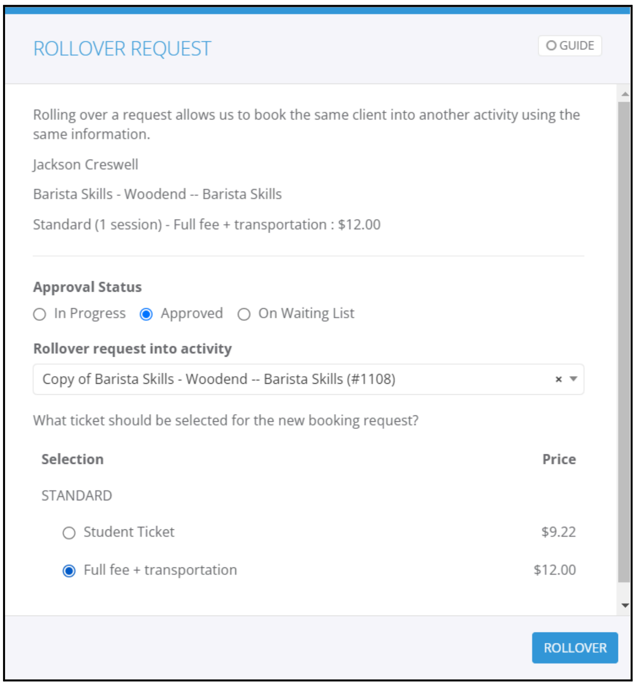
With Social Planet, you can roll your client's activity booking from one term to the next, saving time and energy. Rolling a request allows you to book a client into another activity using the same information.

First, we need to clone or create the activity to roll the client into. If it's an ACFE class, create the subject first, *then* link it to the activity. To do, follow the **How to Clone an Activity For A New Term** tutorial. Next, let's rollover a client request.

1. From the **Frontdesk**, head to the **Requests** header, click **Current**.
2. Enter the client's details in the **Search** field. Click **Actions** on the client tile, then **Rollover to new activity**.

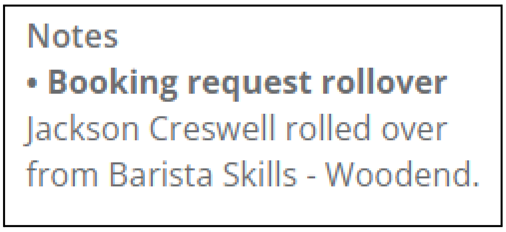


3. The **Rollover Request** window will be displayed, here you can
   - Choose the **Approval Status**.
   - Select **Activity**.
   - Select the **Activity Ticket**.



4. Click **Rollover** to create the rollover booking request.

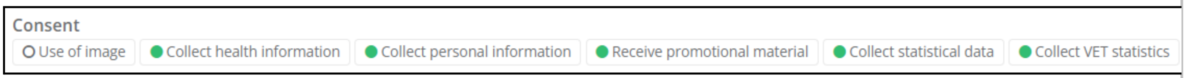
The booking rollover request has now been created, it is the same as any other booking request, except it now includes the note –



How to View Client Consents, such as Use of Image

If you want to take photos of activity participants for promotional material, you need to check that they've given their consent to using their image. Here's how -

1. From the **Frontdesk**, head to the **Activities** header, click **Current** and then **Edit** on the activity of your choice.
2. Select the **Attendee** tab, here, you can view the consents participants have given based on the green dot next to the consent type.



How to View Client Notes and Emergency Health Plans as a Trainer

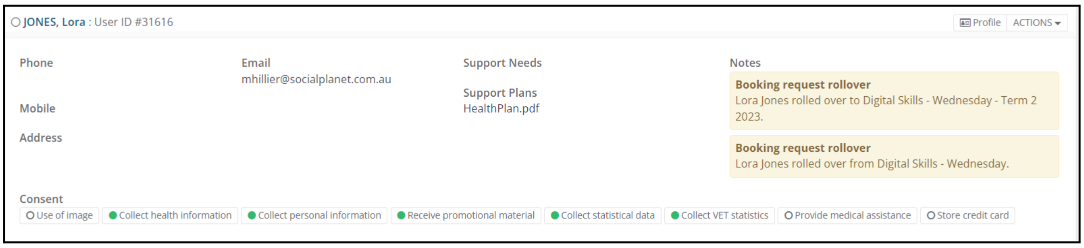
This feature is beneficial for trainers who need to be aware of a client's health needs.

First, to add emergency health information follow the How to Add a Client's Medical and Support Needs tutorial.

Next, to add notes for the trainer, follow the How to View and Add Client Notes tutorial.

Trainer Instructions

1. From the **Frontdesk**, head to the **Activities** header, click **Current** and then **Edit** on the activity of your choice.
2. Select the **Attendees** tab, in each client tile.
3. In each client tile, their **Support Needs** and **Notes** will be available to view.



4. Click the client's **Support Plan** to download.

How to Communicate with Participants using SMS and Email

With Social Planet, you have several ways to communicate with SMS or email to your clients. Email is free, while SMS costs 8.9c per message (160 characters maximum).

How to Send Messages to Attendee Lists –

1. From the **Frontdesk**, head to the **Clients** header, click **Client Groups**
2. Select the **Activity Attendees** tab, use the **Search** function to find your activities **Attendee** list.

   Art and Craft - Thursday (2022-11-10 13:00:00) - Attendee List

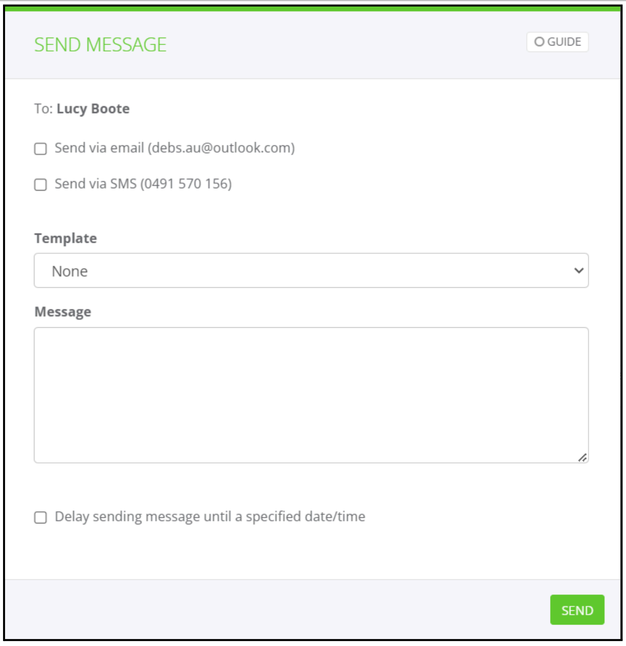
   - *Note that the attendee lists are sorted chronologically, with the session closest to today's date at the top of the list.*
3. Press **Send** on the far-right side of the **Attendee** list tile. This will open the **Send Group Message** page.
4. Follow the instructions provided on this webpage.
5. If you wish to **Delay sending a message until a specified date/time,** tick this box, then **add a reminder reason for scheduling the message**.
6. Press **Send**, and voila!

How to Send Messages via the Attendees Tab –

1. From the **Frontdesk**, head to the **Activities** header, click **Current** and then **Edit** on the activity of your choice.
2. Go to the **Attendees** tab, select the **Session Date**.
3. Click **Actions**, then **Send Group Message**. This will open the **Send Group Message** page.
4. Follow the instructions provided on this webpage.
5. If you wish to **Delay sending a message until a specified date/time,** tick this box, then **add a reminder reason for scheduling the message**.
6. Press **Send**.

How to Send Messages to Individual Clients –

1. From the **Frontdesk**, head to the **Clients** header, click **Client List**.
2. Use the **Search** function to find the client.
3. In the Client tile, click **Actions**, then **Send Message**.
4. Fill out the Send Message window, and click **Send**.



You can reply to messages from clients in the Message Centre, here's how –

1. From the **Frontdesk**, head to the **Messages** header, click **Message Centre**.
2. Use the **Search** field to find messages sent to the client.
3. If a client has replied, there will be an **Expand Conversation** button next to their name
4. Click this button to view the reply and continue the conversation.

How to Create Client Groups

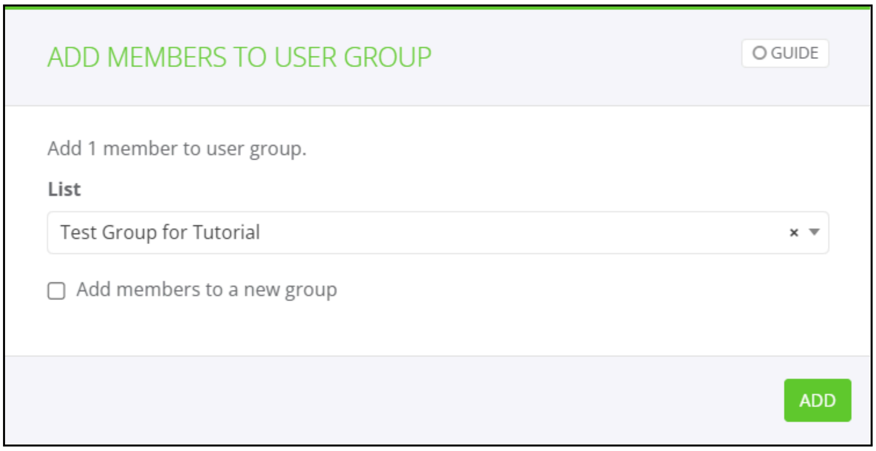
Client groups based around clients' shared interests are valuable tools for creating distribution and communication lists.

Here's how to create a client group.

1. From the **Frontdesk**, head to the **Clients** header, click **Client Groups**.
2. On the far right-hand side of the screen, click **+Add group**. This will display the **Add User Group** window.
3. Add a **name** and **description**, press **Add**.
4. The group will now be available to search in the **Custom User Groups** panel.

Now, here's how to add clients to this group.

1. From the **Frontdesk**, head to the **Clients** header, click **Client List**.
2. On the desired client's tile, click **Actions**, then **Add to User Group**. This will display the **Add Members to User Group** window.



3. Select the desired group from the **List**, and press **Add**. Rinse and repeat until you've filled out your list!

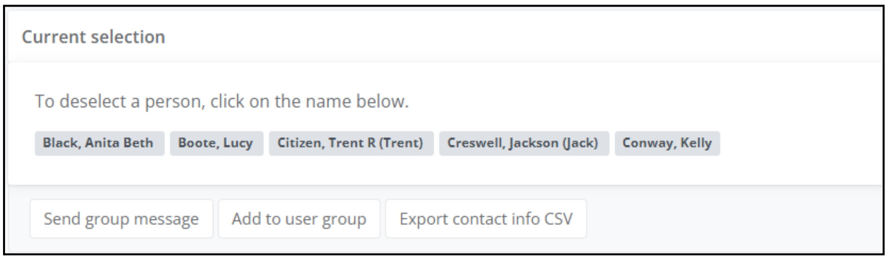
Now we've got a client group, how can we send this group a message or download their details as a distribution list?

1. From the **Frontdesk**, head to the **Clients** header, click **Client Groups**.
2. In the **Custom User Groups** table, use the **Search** function to find the group.
3. Click on the group name to view the client list.
4. Click **Actions**, then either –
   - Send group message
   - Download contact CSV

How to Send Messages to Participants Who Share the Same Support Needs/Interests

When you've tagged a client's interests, disabilities and mobility requirements into their profile, can you use these tags to group similar clients together and send a message by SMS or email.

1. From the **Frontdesk**, head to the **Clients** header, click **Client List**.
2. Enter the relevant tag into the **Interests** search field. Clients will be filtered by this category.
3. Tick each client tile you wish to add to an interest group, then scroll down to the **Current Selection** panel.

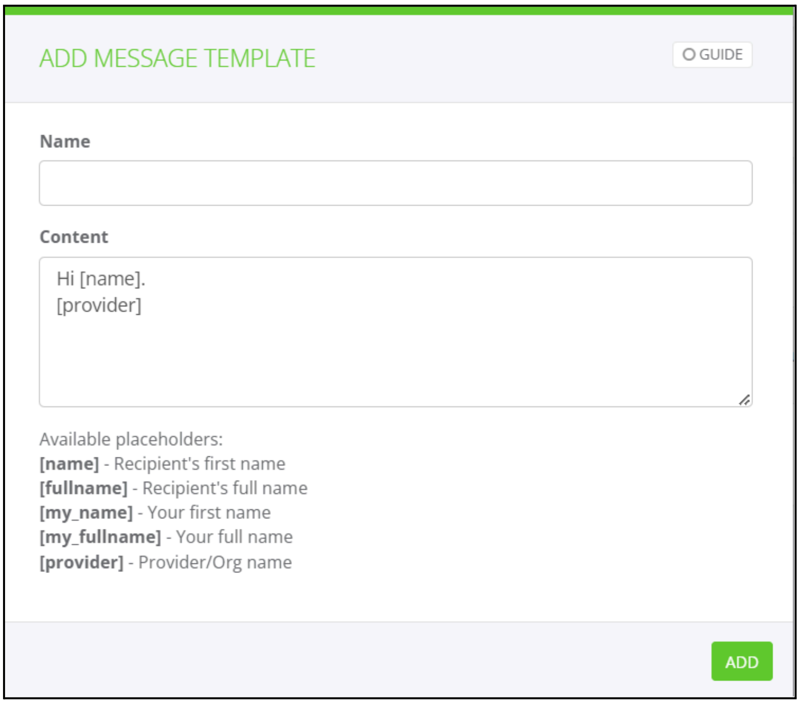


4. Click **Send group message**, this will open the **Send Group Message** page.
5. Follow the instructions provided on this webpage.
6. If you wish to **Delay sending a message until a specified date/time,** tick this box, then **add a reminder reason for scheduling the message**.
7. Press **Send**, and voila!

How to Set Up a Templated Message to Send to Clients

To streamline your communication to clients, set up a template SMS and email.

1. From the **Frontdesk**, head to the **Messages** header, click **Templates**.
2. On the right-hand side of the page, click **+Add Template**.



3. The **Add Message Template** window is now open, here, you can fill out the **Name** and **Content** of the email/SMS using the available placeholders, which automatically fill out with personalised client details when the email is sent.
4. Click **Add**, and voila! The template will now appear on the **Message Templates** panel.

How Send an Email/SMS Message to Class Attendees

To keep your activity attendees up-to-date with activity changes, use the group message feature.

1. From the **Frontdesk**, head to the **Activities** header, click **Current** and then **Edit** on the activity of your choice.
2. Select the **Attendees** tab, on the right-hand side of the screen, click the **Actions** button, then **Send Group Message**.
3. The **Send Group Message** page will now be open.
4. Follow the instructions provided on this webpage.
5. If you wish to **Delay sending a message until a specified date/time,** tick this box, then **add a reminder reason for scheduling the message**.
6. Press **Send**, and voila!

How to Reply to Messages

You can reply to messages from clients in the Message Centre, here's how –

1. From the **Frontdesk**, head to the **Messages** header, click **Message Centre**.
2. Use the **Search** field to find messages sent to the client.
3. If a client has replied, there will be an **Expand Conversation** button next to their name.

4. Click this button to view the reply and continue the conversation.
5. On the left-hand side of the screen is a **Client List** and checkboxes to send **via email** or **via SMS**.
6. Use a templated message by selecting the dropdown list under **Template**.
7. Enter content in the **Message** field.
8. Click **Send**, and you're done!