



Social Planet

Client Management Quick Guide

Love the Local Life

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Social Planet

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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.

Person

Title	Preferred Name	
<input type="text"/>	<input type="text"/>	
First Name (required)	Middle Name	Last Name (required)
<input type="text"/>	<input type="text"/>	<input type="text"/>
Birth Date	Birth Place	Primary Language
<input type="text"/>	<input type="text" value="Select option"/>	<input type="text" value="Select option"/>
Gender		
<input type="radio"/> Female <input type="radio"/> Inter-sex <input type="radio"/> Male <input type="radio"/> Non-binary <input type="radio"/> Not stated <input checked="" type="radio"/> Transgender <input type="radio"/> Women		
Visa Type		
<input type="text" value="Select option"/>		

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.

Communication

Email Address

Mobile No	Phone No
<input type="text"/>	<input type="text"/>
<small>eg. 0499 999 999</small>	<small>eg. 03 9999 9999</small>

Preferred Contact Method

☒ Email ☐ Mobile ☐ Phone

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.

Address

Unit or Apartment no. (only if required)

eg. Unit 2A, or Apartment 203

Street Number and Address

Enter a location

Map

Satellite

☐ Or specify address without using Google Maps

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

Emergency Contact

Contact Name

Contact relationship to client

Contact Email

Contact Mobile No

eg. 0499 999 999

Contact Phone No

eg. 03 9999 9999

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

Support Labels

Medical Conditions or Disability

One or more

Food Allergies or Restrictions

One or more

Mobility

One or more

Is registered with the NDIS

☐ Yes ☐ No ☒ Not stated

Is a carer for someone in their family that has a disability or elderly

☐ Yes ☐ No ☒ Not stated

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

Consent

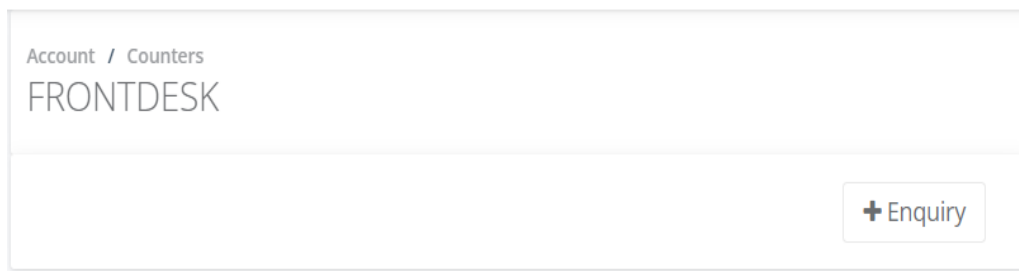
- ☐ Consent to have photo image used
- ☐ Consent for data collection
- ☐ Consent for VET data collection
- ☐ Consent to receive promotional material

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.

The screenshot displays the 'Support' tab interface with the following sections:

- Medical Information** (Edit):
 - Medical Conditions or Disability
 - Food Allergies or Restrictions: Only required if attending cooking, food related activities, or catered activities. (Peanuts)
 - Mobility Aids
- Support Info** (Edit):
 - Support Notes: There are no support related notes recorded for this person.
 - Is registered with the NDIS: Not stated
 - Is a carer for someone in your family that has a disability or elderly: Not stated
- Concession Entitlements or Benefits** (+ Add concession):

Type	Expiry	Sighted By	
Health Care Card	12 Mar 2023	Nathan Brown	Edit ✕
- Covid-19** (Edit):
 - Vaccination Status: 3 Dose
 - Evidence: Digital Certificate sighted by Roger Clay on 12 Jul 2022
- Health Care Packages** (+ Add care package):

No care packages recorded.
- NDIS Funding Packages** (+ Add NDIS funding package)

- 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.

The screenshot displays the 'Contacts' tab interface with the following sections:

- Emergency and Alternative Contacts** (+ Add contact):
 - Erin Raiwala / Mother (PRIMARY) (Edit ✕)
 - Mobile No 0491 570 156
- Billers** (+ Add biller):
 - Michael Hillier, APM Employment Outreach (View Edit ✕)
 - Postal Address
 - Email: mhillier@socialplanet.com.au
 - Mobile No: 0418 139 515
- Dependents / Children** (+ Add dependent):
 - BEAUREPAIRE, Henry / Male, 7 years old (10 Oct 2016). (Edit ✕)
 - Medical Conditions or Disability: Autism
 - Food Allergies or Restrictions: Peanuts

- 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**.

Beaupaire, Mia : User ID #31246 , Student ID #10001

Mobile No 0491 570 157 Phone No 03 4805 1646

Email mia@socialplanet.com.au

Alternative Contact Erin Raiwala (0491 570 156)

About Me Had a brief career working with dolls in the aftermarket. Have some experience supervising the production of easy-bake-ovens.

Comments Mia likes to receive a reminder SM

Interests Tai chi Bike riding

Support Peanuts

Groups Creative Arts Health and Wellbeing Tai Chi
Clients enrolled between 01 Sep 2023 - 30 Nov 2023
Clients enrolled between 01 Jan 2023 - 01 Feb 2023

Memberships WCH Voting Members - Executive - AGM #10001
WCH Membership - Standard #10003

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.

Users / Clients / Activity Booking
CREATE BOOKING REQUEST

Client Details Profile

Beaupaire, Mia
0491 570 157
mia@socialplanet.com.au
14 Clyde Avenue, Saint Leonards VIC 3223
ACFE Status NOT STATED

Recent Bookings 5

Activity Details View

Barista@Work PUBLIC 2023 Term 1
Fri, 24 Mar 2023, 9:30 AM
Cafe

Capacity and Availability
Total places available: 6
Remaining places available: 6

Booking Status
Approved: 0
In Progress: 0
Waiting List: 0

Enrolments
The client's student profile will need to be reviewed so it is up-to-date.
Once approved the following enrolments will need to be created
• 23SHMBAW - Barista@work - Term 1 2023
[23SHMBAW] (24 Mar 2023 - 31 Mar 2023)

Sessions

Booking Request Form

Purchase Options Price

TERM 1 2023

Free \$0.00

SUB TOTAL \$0.00

TOTAL \$0.00

Payment Method
☐ Bank Transfer ☐ Cash ☐ Cheque
☐ Credit Card - offline ☐ Debit Card ☐ EFT
☐ Payment Plan ☐ Invoice ☐ Other
☐ Not Required ☒ Credit Card - online

— PAY BY CREDIT CARD USING ONLINE PAYMENT GATEWAY
☒ Or manually enter card details

Name on Credit Card

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".

The screenshot shows a booking request tile for Ursula Green. At the top, there's a header bar with the date and time '13 Feb 2023, 11:38 AM - KQ8WQ9' and several status tabs: 'ACTION REQUIRED' (highlighted in orange), 'IN PROGRESS' (highlighted in red), 'Activity Booking', and 'Rollover'. An 'Actions' dropdown button is on the right. The main content area is divided into sections: Client Information (Name, Email, Mobile No), Activity Details (Activity name, Term, Bring your own device, Ticket Selection), Enrolments (Payments, Requested payment by, Client Funds Balance), and Session Allocation (9 of 9 sessions, View sessions button). A Confirmation Email status is shown as 'Not sent'. On the right, there's an 'ACTION' box with a note about the status being ready to be updated to 'Done', and a 'Notes' section mentioning a booking request rollover.

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.

The screenshot shows the 'Actions' dropdown menu. The menu is open, displaying a list of actions: 'Update status', 'Change details', 'Allocate sessions', 'Send confirmation email', 'Add invoice', 'Add payment plan', 'Unlink client', and 'Rollover to new activity'. The 'Actions' button is highlighted with a red box.

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.

ALLOCATE SESSIONS GUIDE

Total sessions: 9
Sessions allocated: 9

General

Select All

☒ 26 Apr 2023, 1:00 PM (4 / 12) ☒ 03 May 2023, 1:00 PM (4 / 12)

☒ 10 May 2023, 1:00 PM (3 / 12) ☒ 17 May 2023, 1:00 PM (4 / 12)

☒ 24 May 2023, 1:00 PM (3 / 12) ☒ 31 May 2023, 1:00 PM (4 / 12)

☒ 07 Jun 2023, 1:00 PM (4 / 12) ☒ 14 Jun 2023, 1:00 PM (4 / 12)

☒ 21 Jun 2023, 1:00 PM (4 / 12)

Status
Confirmed

SAVE

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

SEND CONFIRMATION EMAIL GUIDE

Recipient Name
Ursula Green

Recipient Email
UrsulaGreen@bmail.com

SEND

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

UPDATE STATUS GUIDE

Status
☐ New ☒ Action Required ☐ Done ☐ Archived

Approval Status
☐ In Progress ☒ Approved ☐ On Waiting List ☐ On Hold ☐ Rejected

SAVE

- 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.

ADD INVOICE [O GUIDE](#)

The following line items can to be assigned.

Description	GST	Amount
2023 Term 1, Community Garden annual membership #2KM1ST / Pro-Rata Booking for Kevin Bacon : Example Pro-Rata Ticket (6 sessions)	0.00	20.00

Assign items to
☐ An existing invoice ☒ A new invoice
Create and issue an invoice for this request.
Ashton Gascoigne will be assigned as the recipient of this invoice.

Issue Date

Payment Type

☒ Also mark as payment received in full

ADD

ADD PAYMENT PLAN [O GUIDE](#)

Details
Ashton Gascoigne
Community Garden annual membership
Pro-Rata Booking for Kevin Bacon (6 sessions) - Example Pro-Rata Ticket (\$ 20.00)

Total Amount

Installment Amount

Result
2 payments of \$ 10.00
Generate 2 invoices.

ADD

ROLLOVER REQUEST [O GUIDE](#)

Rolling over a request allows us to book the same client into another activity using the same information.

Ursula Green
Digital Skills - Wednesday - Term 2 2023 -- Bring your own device, digital skills - Term 2 2023
Standard (9 sessions) - Free : \$0.00

Approval Status
☐ In Progress ☒ Approved ☐ On Waiting List

Rollover request into activity

What ticket should be selected for the new booking request?

Selection	Price
TERM	
<input checked="" type="radio"/> Adult and canine Free booking for adult and canine	\$0.00

ROLLOVER

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.

EDIT STUDENT INFO GUIDE

Student ID
1000245

VSN
888 888 888
eg. 888 888 888

VET USI

ACFE Qualification Status
Qualified

Secondary Education
Attending Secondary School
☐ Yes ☒ No ☐ Not Stated

Completion Level
12 - Completed year 12

Year of Completion
2014
YYYY

Tertiary Education
Current or last attended Tertiary Institution

SAVE

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.

Notes / List
NOTE LIST

Date Range
09/03/2023 - 16/03/2023
Apply Filter

Search:

Previous 1 Next

Date	Description	Author	Linked User	Linked Activity	Labels
15 Mar 2023, 2:17 PM	Tanya has memory loss, needs a friendly reminder phone call	Michael Hillier - SC	Tanya Stevens %		Edit X

Showing 1 to 1 of 1 entries

Previous 1 Next

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.

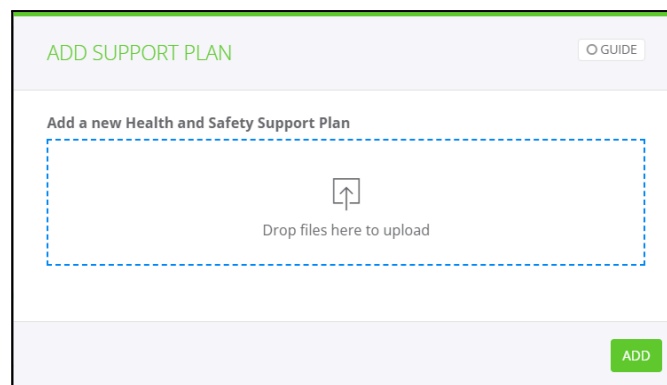
The screenshot shows a form titled "UPDATE MEDICAL INFO" with a "GUIDE" link. It contains three sections: "Medical Conditions or Disability" with a dropdown menu showing "Vision"; "Food Allergies or Restrictions" with a dropdown menu showing "Dairy" and "Tree nuts"; and "Mobility" with a dropdown menu showing "Recent ankle sprain". A "SAVE" button is at the bottom right.

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

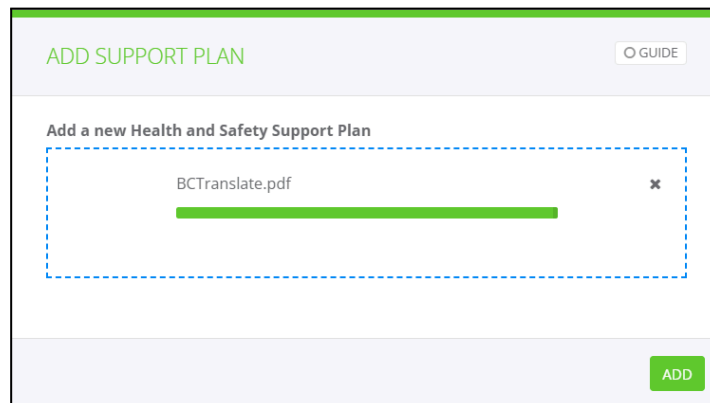
How to Upload a Client's Emergency Health Plan

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 as an alert on the **Health and Safety Plan** panel. Staff can click on the file name to open this document.

Health and Safety Plans

+ Add plan

 Support plan or safety plan required.

Plan File	Date Added
BCTranslate.pdf	Mar 16, 2023, 1:06:14 AM

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

STEVENS, Tanya : User ID #31815

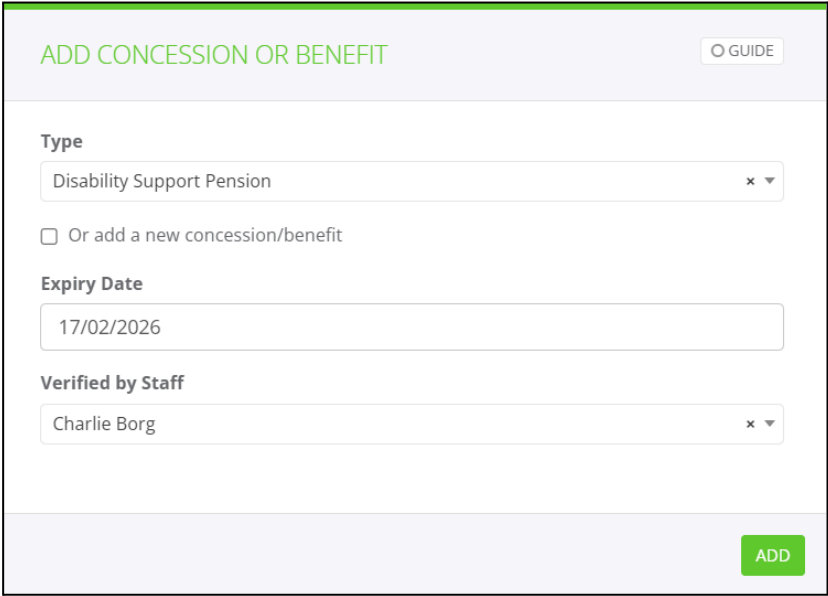
Profile ACTIONS

Phone	Email	Support Needs	Notes
Mobile	mhillier@socialplanet.com.au	Support Plans	Tanya has memory loss, needs a friendly reminder phone call
0418 139 515		HealthPlan.docx	
Address			
341 George Street, Sydney NSW 2000			
Consent			
<input type="radio"/> Use of image <input checked="" type="radio"/> Collect health information <input checked="" type="radio"/> Collect personal information <input type="radio"/> Receive promotional material <input checked="" type="radio"/> Collect statistical data <input checked="" type="radio"/> Collect VET statistics <input type="radio"/> Provide medical assistance <input type="radio"/> Store credit card			

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.

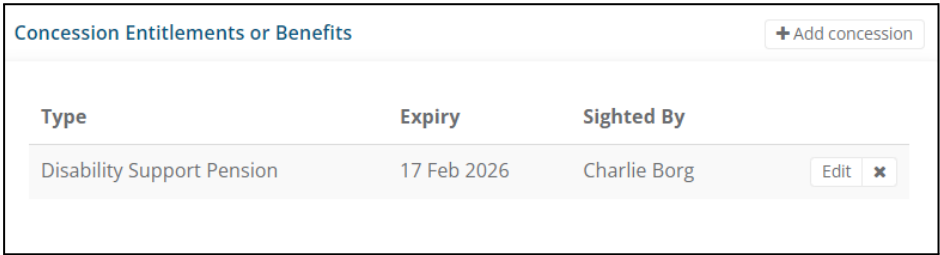


The screenshot shows a form titled "ADD CONCESSION OR BENEFIT" with a "GUIDE" link. It contains the following fields:

- Type**: A dropdown menu with "Disability Support Pension" selected.
- ☐ Or add a new concession/benefit
- Expiry Date**: A date input field with "17/02/2026" entered.
- Verified by Staff**: A dropdown menu with "Charlie Borg" selected.
- ADD**: A green button at the bottom right.

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.



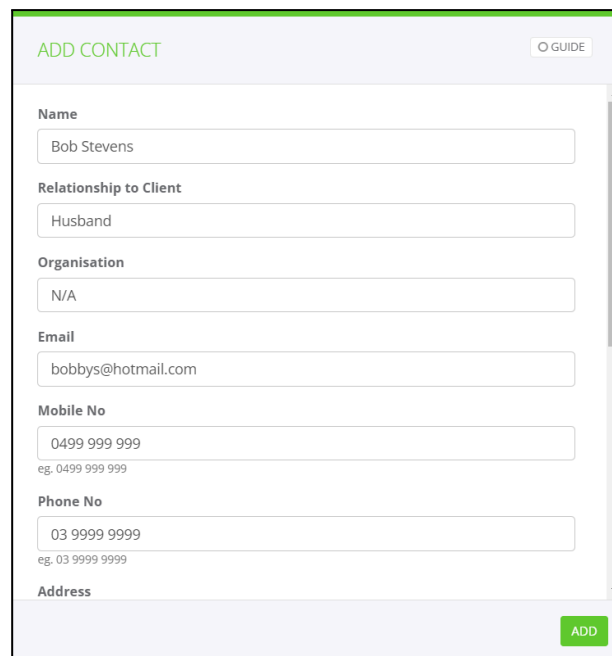
The screenshot shows a table titled "Concession Entitlements or Benefits" with a "+ Add concession" button. The table has three columns: Type, Expiry, and Sighted By. It contains one row of data.

Type	Expiry	Sighted By	
Disability Support Pension	17 Feb 2026	Charlie Borg	Edit X

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

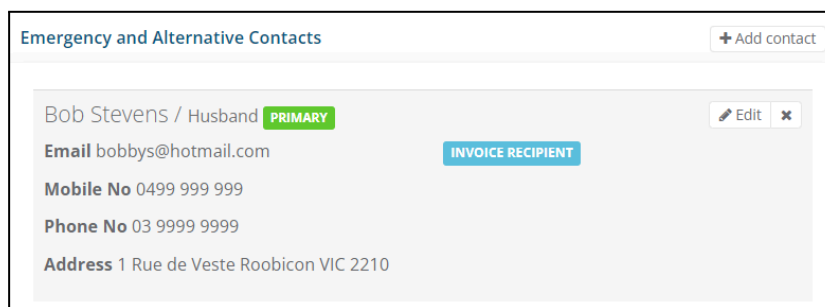
How to Add a Client's Emergency Contact

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



The screenshot shows the 'ADD CONTACT' form. At the top, it says 'ADD CONTACT' in green, with a 'GUIDE' link. The form has several input fields: 'Name' (filled with 'Bob Stevens'), 'Relationship to Client' (filled with 'Husband'), 'Organisation' (filled with 'N/A'), 'Email' (filled with 'bobbys@hotmail.com'), 'Mobile No' (filled with '0499 999 999', with a note 'eg. 0499 999 999'), and 'Phone No' (filled with '03 9999 9999', with a note 'eg. 03 9999 9999'). There is an 'Address' field at the bottom. A green 'ADD' button is at the bottom right.

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.



The screenshot shows the 'Emergency and Alternative Contacts' panel. At the top, it says 'Emergency and Alternative Contacts' in blue, with a '+ Add contact' button. Below, there is a list of contacts. The first contact is 'Bob Stevens / Husband' with a green 'PRIMARY' tag. To the right of this contact are 'Edit' and 'X' buttons. Below the name, the contact details are listed: 'Email bobbys@hotmail.com', 'Mobile No 0499 999 999', 'Phone No 03 9999 9999', and 'Address 1 Rue de Veste Roobicon VIC 2210'. There is a blue 'INVOICE RECIPIENT' button next to the email.

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.

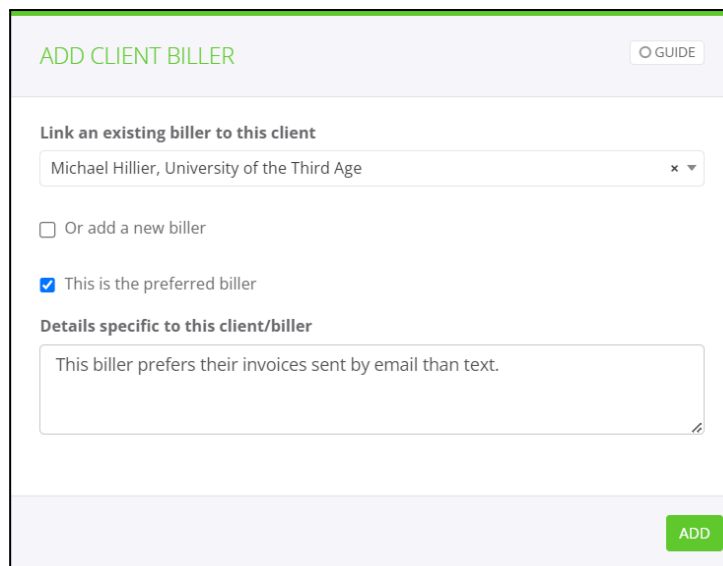
1. From the **Frontdesk**, go to **Clients** and select **Client List**.
2. Fill out the **Search Field** and select the **Edit** button on the **Client Profile** tile.
3. In the **Support** tab, go to the **Dependents / Children** tile and select **+Add dependent**.
4. The **Add Dependent** window will 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.

The screenshot shows a web interface titled "Dependents / Children" with a "+ Add dependent" button in the top right. Below the title bar, there is a card for a client named "STEVENS, Taylor / Female, 8 years old (23 Mar 2015)". To the right of the name is an "Edit" button with a pencil icon and a close button with an "x" icon. The card is divided into two main sections: "Medical Conditions or Disability" and "Food Allergies or Restrictions". Under "Medical Conditions or Disability", there is a text input field with the value "Celiac's Disease". Under "Food Allergies or Restrictions", there is a text input field with the value "Loves their footy.".

How to Add a Biller for Third Party Payers

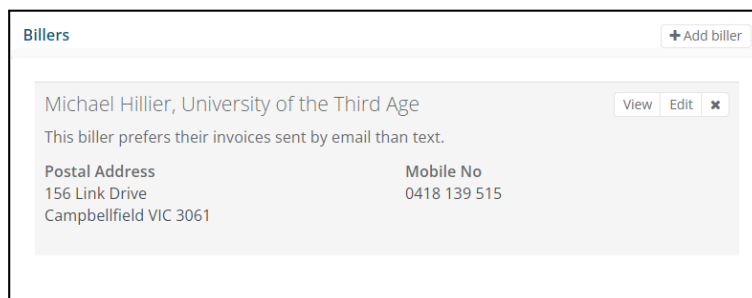
If a third-party intermediary is paying the client's activity costs, here's how to set them up as a biller

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.



The screenshot shows the 'ADD CLIENT BILLER' form. At the top, there's a title 'ADD CLIENT BILLER' in green and a 'GUIDE' link. Below the title, there's a section 'Link an existing biller to this client' with a dropdown menu showing 'Michael Hillier, University of the Third Age'. There's a checkbox 'Or add a new biller' which is unchecked, and another checkbox 'This is the preferred biller' which is checked. Below these is a section 'Details specific to this client/biller' with a text area containing 'This biller prefers their invoices sent by email than text.' At the bottom right, there's a green 'ADD' button.

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.



The screenshot shows the 'Billers' tile. At the top, there's a title 'Billers' and a '+ Add biller' button. Below the title, there's a card for 'Michael Hillier, University of the Third Age' with 'View', 'Edit', and 'X' buttons. Below the card, there's a section 'Postal Address' with the address '156 Link Drive, Campbellfield VIC 3061' and a 'Mobile No' section with the number '0418 139 515'.

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				Past activity attendance			
Show 10 entries		Search:		Show 10 entries		Search:	
Status	Activity	Date	Attendance	status	Activity	Date	Attendance
●	Digital literacy for employment	Wed, 22 Mar 2023, 10:00 AM	○	●	Digital literacy for employment	Wed, 01 Feb 2023, 10:00 AM	✓
●	Barista@Work	Fri, 24 Mar 2023, 9:30 AM	○	●	Digital literacy for employment	Wed, 08 Feb 2023, 10:00 AM	○
●	Digital literacy for employment	Wed, 29 Mar 2023, 10:00 AM	○	●	Digital literacy for employment	Wed, 15 Feb 2023, 10:00 AM	○
●	Digital literacy for employment	Wed, 05 Apr 2023, 10:00 AM	○	●	Digital literacy for employment	Wed, 22 Feb 2023, 10:00 AM	○
Showing 1 to 4 of 4 entries				Showing 1 to 7 of 7 entries			
Previous 1 Next				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

ADD MEMBERSHIP [GUIDE](#)

Name
Social Planet Neighbourhood House, Indoor Gym Membership

Details
Provides licensed access to the SP gym from 6am to 10pm.

Initial Membership Level Name
Standard Member

Initial Membership Level Details
Must resign contract every 12 months for continued access.
AGM on zoom for procuring new gear.

☒ Is Active

ADD

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.

Level Name	Level Details	Count
✓ Standard		0

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**.

Beaupaire, Mia: User ID #31246, Student ID #10001

Mobile No 0491 570 157 Phone No 03 4805 1646

Email mia@socialplanet.com.au

Alternative Contact Erin Raiwala (0491 570 156)

About Me Had a brief career working with dolls in the aftermarket. Have some experience supervising the production of easy-bake-ovens.

Interests Tai chi Bike riding

Support Peanuts

Groups Creative Arts Health and Wellbeing Tai Chi

Clients enrolled between 01 Sep 2022 - 30 Nov 2022

Clients enrolled between 01 Jan 2023 - 01 Feb 2023

Memberships WCH Voting Members - Executive - AGM #10001 WCH Membership - Standard #10001

Actions: Send message, Create activity booking, Create venue hire, Add to user group, Add membership, Archive

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**.

ADD MEMBER GUIDE

Current memberships

- WCH Voting Members - Executive - AGM (20 Jul 2022 - 31 Dec 2022)
- WCH Membership - Standard (01 Aug 2022)

Membership Gym Membership - Standard x

Member No

Leave blank to auto assign generated member no.

Start Date 16/03/2023

End Date 16/03/2024

☐ Is Expired

☒ Is Active

ADD

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**.

The screenshot shows two side-by-side filter panels. The 'Client' panel on the left has a search bar and a list of clients, with 'All clients' selected. The 'Activity' panel on the right has a search bar and a list of activities, with 'Womens Woodworking - Term 1, 2023 (#1087)' selected.

Client	Activity
All clients	Womens Woodworking - Term 1, 2023 (...)
Adler, Beulah	Wednesday - Learn to Sign (#1027)
Beaurepaire, Mia	Welding For Beginners - Saturday (#1053)
Black, Anita	Welding for Beginners - Thursday - Term 1 2023 (#1105)
Boote, Lucy	Womens Woodworking - Term 1, 2023 (#1087)
Conway, Kelly	yg (#1083)
Croswell, Jackson	Yoga - Thursday (#950)

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

The screenshot shows the client profile page for Mia Beaurepaire. It includes contact information, activity details, ticket selection, session allocation, and a list of actions to process the booking.

Client	Activity	Enrolments
Mia Beaurepaire	Barista@Work - Fridays - Term 1 2023	Payments
Email: mia@socialplanet.com.au	Barista@Work (#1098)	Requested payment by: Not Required
Mobile No: 0491 570 157	Ticket Selection	Client Funds Balance: \$0.00
Phone No: 03 4805 1646	Term 1 2023 (1 session) - Free (\$0.00)	
	Session Allocation	
	0 of 1 View sessions	
	Confirmation Email	
	Not sent	

- Update status
- Change details
- Allocate sessions
- Create enrolment
- Send enrolment email
- Open enrolment form
- Send confirmation email
- Add invoice
- Add payment plan
- Unlink client
- Rollover to new activity

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**.

The screenshot shows two side-by-side dropdown menus. The left menu is titled 'Client' and has a search bar at the top. Below the search bar, a list of client names is displayed, with 'All clients' highlighted in blue. The right menu is titled 'Activity' and also has a search bar. Below the search bar, a list of activities is displayed, with 'Womens Woodworking - Term 1, 2023 (#1087)' highlighted in blue. Both menus have a close button (x) and a scroll arrow (triangle) in the top right corner.

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.

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

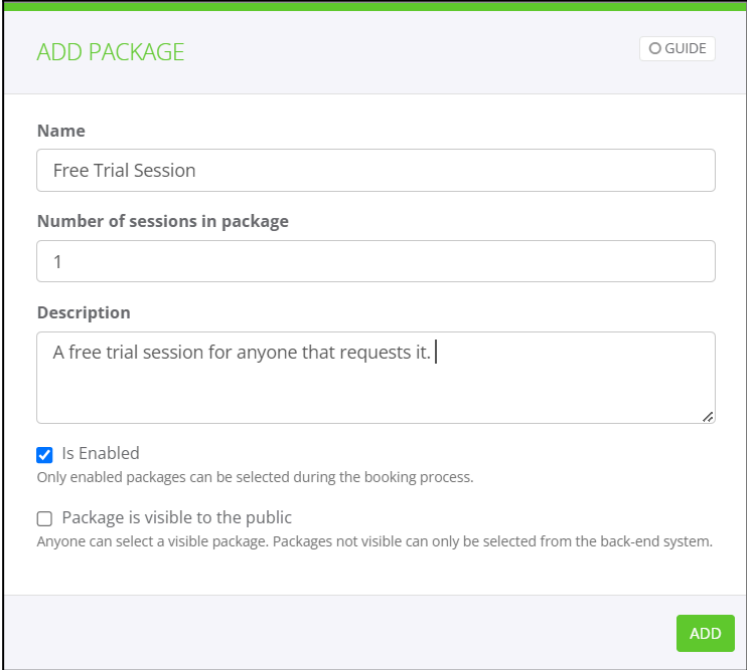
The status of all **booking requests** for an activity can be found in the bottom-right hand corner of the activity tile.

33

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**.









The screenshot shows a modal window titled "ADD PACKAGE" with a "GUIDE" link. It contains the following fields and options:

- Name:** A text input field containing "Free Trial Session".
- Number of sessions in package:** A text input field containing "1".
- Description:** A text area containing "A free trial session for anyone that requests it." with a cursor at the end.
- Is Enabled:** A checked checkbox with the text "Only enabled packages can be selected during the booking process."
- Package is visible to the public:** An unchecked checkbox with the text "Anyone can select a visible package. Packages not visible can only be selected from the back-end system."
- ADD:** A green button at the bottom right.

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.

Free Trial Session (1 sessions)			 Edit	 Add ticket	
	Advertised Price	inc. GST	Entitlement		
Free trial (id 1467) 	\$0.00	N	\$0.00	 Edit	

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**.

Capacity
The number of people who can attend a single session. Put 0 or leave blank for no limit.

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.”

PRICING GUIDE

TERM 2 - APRIL TO JUNE 2021

Concession	\$ 50
Full Fee	\$ 80

AVAILABILITY
Spots are still available.

[Book Now](#)

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

Digital Skills - Wednesday (#1054)

Capacity

12 Approved

Promoted as
Bring your own device, digital skills

Next Session
Wed, 22 Mar 2023, 1:00 PM

AT CAPACITY Activity is at or exceeded capacity limit.
Total places available: **12**
Remaining places available: **0**

WARNING If you proceed, the *Booking Status* will default to **'Waiting List'**.
Only change the *Booking Status* if you are certain the activity can accommodate overbooking.

[Continue Booking](#)

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

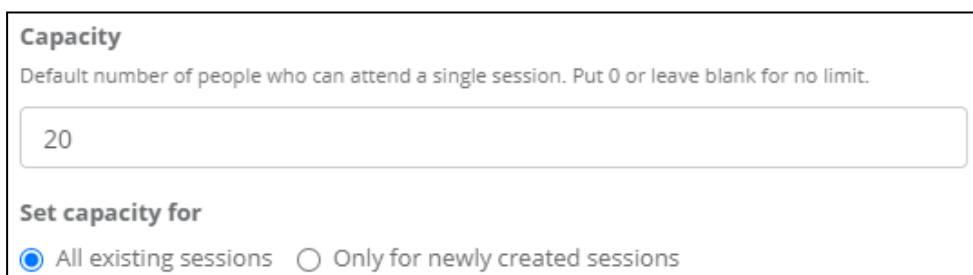
☐ In Progress ☐ Approved ☒ Place on Waiting List

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



Capacity
Default number of people who can attend a single session. Put 0 or leave blank for no limit.

20

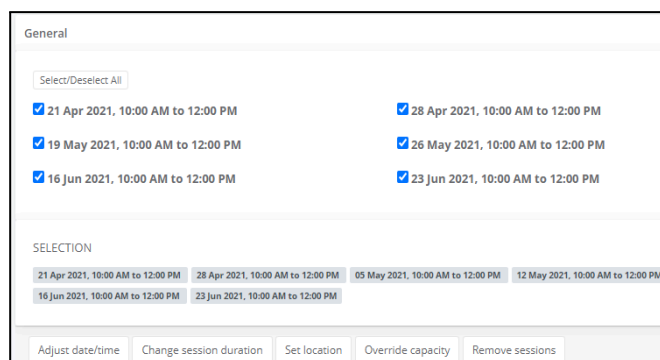
Set capacity for

☒ 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**.



General

Select/Deselect All

<input checked="" type="checkbox"/> 21 Apr 2021, 10:00 AM to 12:00 PM	<input checked="" type="checkbox"/> 28 Apr 2021, 10:00 AM to 12:00 PM
<input checked="" type="checkbox"/> 19 May 2021, 10:00 AM to 12:00 PM	<input checked="" type="checkbox"/> 26 May 2021, 10:00 AM to 12:00 PM
<input checked="" type="checkbox"/> 16 Jun 2021, 10:00 AM to 12:00 PM	<input checked="" type="checkbox"/> 23 Jun 2021, 10:00 AM to 12:00 PM

SELECTION

21 Apr 2021, 10:00 AM to 12:00 PM	28 Apr 2021, 10:00 AM to 12:00 PM	05 May 2021, 10:00 AM to 12:00 PM	12 May 2021, 10:00 AM to 12:00 PM
16 Jun 2021, 10:00 AM to 12:00 PM	23 Jun 2021, 10:00 AM to 12:00 PM		

Adjust date/time Change session duration Set location Override capacity Remove sessions

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

○ GUIDE

ATTENTION

You are about to change the capacity size of the following sessions:
01 Feb 2023, 1:00 PM, 08 Feb 2023, 1:00 PM, 15 Feb 2023, 1:00 PM, 22 Feb 2023, 1:00 PM, 01 Mar 2023, 1:00 PM, 08 Mar 2023, 1:00 PM, 15 Mar 2023, 1:00 PM, 22 Mar 2023, 1:00 PM, 29 Mar 2023, 1:00 PM, 05 Apr 2023, 1:00 PM, 27 May 2023, 12:00 AM, 24 Jun 2023, 12:00 AM

for activity **Bring your own device, digital skills.**

Default capacity for activity is **12**.

You will need to ensure that these session are not over-filled after the capacity change.

Capacity
The number of people who can attend a single session. Put 0 or leave blank for no limit.

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	

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.

Symbols
Attending
Attended
Did not show
Cancelled
Short notice cancellation

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

SIGN-OFF

GUIDE

GS1 Getting Started: 07/03/2023, 9:30 AM - 12:00 PM

Client	Status	Comment
Conway, Kelly	Attending	
Hemmingway, Ernest	Attending	
Jett, Jone	Did not show	Needs to pay for previol
Jones, Lora	Attending	
Smith, Susan	Attending	
Stubbs, Neil	Attending	

SAVE

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.

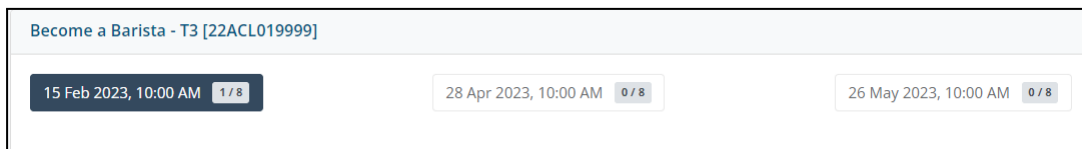
How to Copy Attendants into a New Activity Session

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

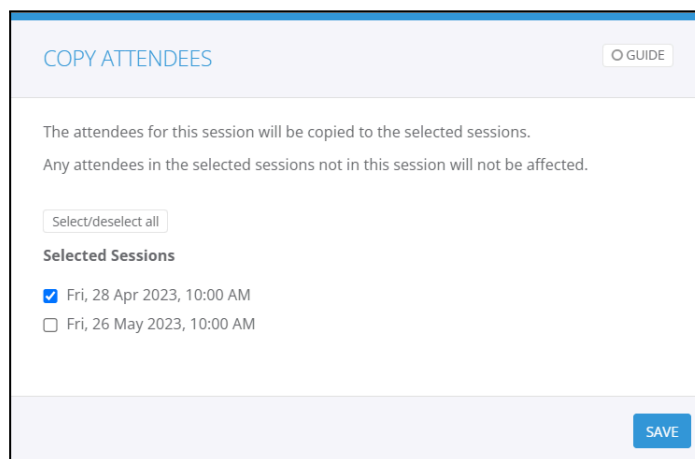
1. From the **Frontdesk**, head to the **Activities** header, click **Current** and then **Edit** on the activity of your choice.
2. Select the **Sessions** tab, then click **+Add sessions**. Follow the How to Add New Sessions to an Activity tutorial.



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.

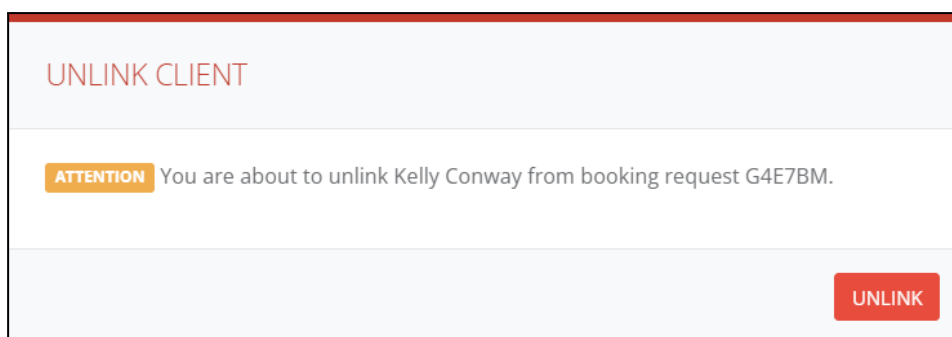


5. Choose the new session, then press **Save!**

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.

LINK CLIENT

GUIDE

Conway, Kelly

Email: kellyconway@example.com.au

Mobile: 0418 555 555

Search: marg

Phillips, Marg

Select

Email: margaret.phillips7@bigpond.com

Mobile: 0417 517 204 Phone No: 03 5728 2595

Previous

1

Next

TIP

If you do not believe that the person is an existing client then quickly create a client below.

☐ Create a new client based on details from this request.

SAVE

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

Phillips, Marg

Select

Email: margaret.phillips7@bigpond.com

Mobile: 0417 517 204 Phone No: 03 5728 2595

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**.

The screenshot shows a client request for Jackson (Jack) Creswell. The page is divided into several sections: Client Information, Activity Details, Enrolments, Payments, Ticket Selection, Session Allocation, and Confirmation Email. A dropdown menu is open on the right, showing options like 'Update status', 'Change details', 'Allocate sessions', 'Create enrolment', 'Send enrolment email', 'Open enrolment form', 'Send confirmation email', 'Add invoice', 'Add payment plan', 'Unlink client', and 'Rollover to new activity'.

Client Information	Activity Details	Enrolments	Payments	Ticket Selection	Session Allocation	Confirmation Email
Client: Jackson (Jack) Creswell Name from booking: Jackson Creswell Email: suls1958@example.com Mobile No: 0491 570 159 Phone No: 03 3211 7031	Activity: Barista Skills - Woodend Barista Skills (#1079) Ticket Selection: Standard (1 session) - Full fee + transportation (\$12.00)	Enrolments: 1 Payments: Requested payment by: Not Required Client Funds Balance: \$0.00			Session Allocation: 1 View sessions	Confirmation Email: Sent 28 Mar 2023

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

The screenshot shows the 'ROLLOVER REQUEST' window. It contains a description of the process, client information, and options for approval status, activity selection, and ticket selection. The 'Approval Status' is set to 'Approved'. The 'Rollover request into activity' dropdown is set to 'Copy of Barista Skills - Woodend -- Barista Skills (#1108)'. The 'Selection' table shows two options: 'Student Ticket' for \$9.22 and 'Full fee + transportation' for \$12.00. The 'Full fee + transportation' option is selected. A 'ROLLOVER' button is at the bottom right.

ROLLOVER REQUEST

Rolling over a request allows us to book the same client into another activity using the same information.

Jackson Creswell

Barista Skills - Woodend -- Barista Skills

Standard (1 session) - Full fee + transportation : \$12.00

Approval Status

☐ In Progress ☒ Approved ☐ On Waiting List

Rollover request into activity

Copy of Barista Skills - Woodend -- Barista Skills (#1108)

What ticket should be selected for the new booking request?

Selection	Price
STANDARD	
<input type="radio"/> Student Ticket	\$9.22
<input checked="" type="radio"/> Full fee + transportation	\$12.00

ROLLOVER

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 –

Notes

- **Booking request rollover**

Jackson Creswell rolled over
from Barista Skills - Woodend.

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.

Consent

☐ Use of image ☒ Collect health information ☒ Collect personal information ☒ Receive promotional material ☒ Collect statistical data ☒ Collect VET statistics

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.

○ JONES, Lora : User ID #31616 Profile ACTIONS

Phone	Email mhillier@socialplanet.com.au	Support Needs	Notes
Mobile		Support Plans HealthPlan.pdf	Booking request rollover Lora Jones rolled over to Digital Skills - Wednesday - Term 2 2023.
Address			Booking request rollover Lora Jones rolled over from Digital Skills - Wednesday.

Consent

☐ Use of image ☒ Collect health information ☒ Collect personal information ☒ Receive promotional material ☒ Collect statistical data ☒ Collect VET statistics ☐ Provide medical assistance ☐ Store credit card

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**.

The screenshot shows a 'SEND MESSAGE' form with a light purple header. In the top right corner of the header is a link that says 'GUIDE'. Below the header, the 'To:' field is populated with 'Lucy Boote'. There are two checkboxes: 'Send via email (debs.au@outlook.com)' and 'Send via SMS (0491 570 156)'. Below these is a 'Template' section with a dropdown menu currently showing 'None'. Underneath is a 'Message' section with a large, empty text area. At the bottom of the form is a checkbox labeled 'Delay sending message until a specified date/time'. A green 'SEND' button is located in the bottom right corner of the form.

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

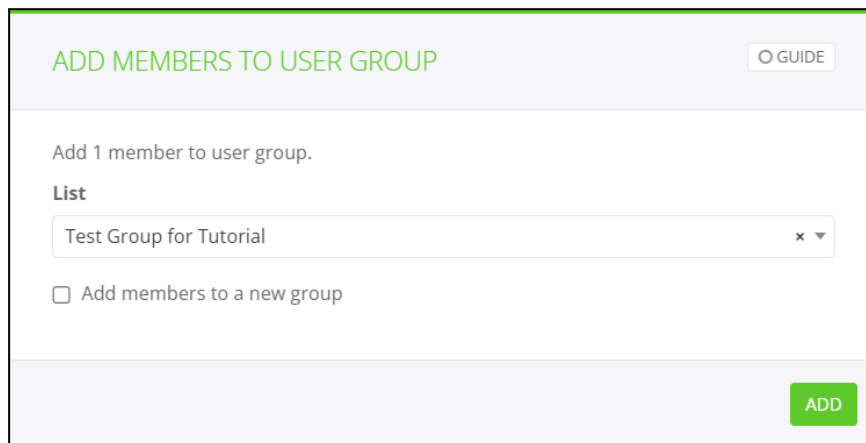
Client groups based around clients' shared interests are valuable tools for creating distribution and communication lists.

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!

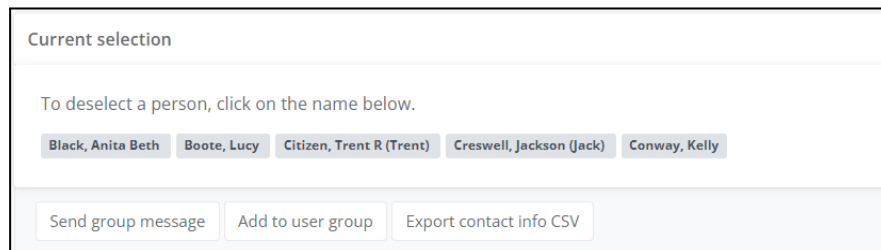
Now we've got a client group, how can we send this group a message or download their details as a distribution list?

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.



The screenshot shows a panel titled "Current selection". Below the title, it says "To deselect a person, click on the name below." There are five client names in grey buttons: "Black, Anita Beth", "Boote, Lucy", "Citizen, Trent R (Trent)", "Creswell, Jackson (Jack)", and "Conway, Kelly". At the bottom of the panel, there are three buttons: "Send group message", "Add to user group", and "Export contact info CSV".

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**.

ADD MESSAGE TEMPLATE GUIDE

Name

Content

Hi [name].
[provider]

Available placeholders:
[name] - Recipient's first name
[fullname] - Recipient's full name
[my_name] - Your first name
[my_fullname] - Your full name
[provider] - Provider/Org name

ADD

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.

A rectangular button with a thin black border and a light gray background. The text "Expand conversation" is centered in a medium-weight, sans-serif font.

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!