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 **Class.Net –** Help Document

**Groups – Homestay Confirmation Letters**

**This document explains how to produce host family confirmation letters for a group of students as a batch.**

*Please refer to help document HS054 for producing host family confirmation letters for individual bookings outside of a group.*

**There are two stages to this process:**

1. **Create a document template**
2. **Create a quick report to find the hosts in order to merge the documents**
3. **CREATE A MASTER DOCUMENT**

Go to: Documents / Enrolment



A list of your existing master documents will be displayed.

Select **ADD** to create a new document

Input the document details:

**Send To** – Accommodation (if sending the documents to the host family)



A new blank document will be displayed on screen together with a “Word Edit” box.

To add merge fields to the host family confirmation letter click  to the left of the required category to open up the available fields.

To add the hosts name click  to the left of ‘Accommodation Booking’ and double click to the left of ‘Accommodation-Booking-Host’



Click on the relevant field to insert the code into the document, e.g. txtForename, txtSurname.

Alternately, highlight the required field(s) and select ‘Insert’



Add all the required text and merge fields to the document.

Below is an example of a master host family confirmation letter with all text and merge fields:



Once the text and merge fields have been added to the document it must be saved.

It is important to save the document by selecting “SAVE” within the “Word Edit” box.



1. **CREATE A QUICK REPORT**

Go to: Reporting / Quick Reports

Report Type = Accomm - Booking



Select **ADD** to create a new report.

**Name**: Enter the report name

**School**: If you have multiple schools select the required school

**Date Filter**: None (the group name will be used to find the list of host families)

**Dates**: greyed out as not required

**Selected Fields**: add the required fields. Ensure to include the field:

 ‘Accommodation - Booking E Host Booking Id’



To add the fields to the report click on the “**Add Item**” button

Within the “Add Field” box click  to the left of the required category to open up the available fields.

To add the host family name click  to the left of ‘Accommodation’ and then click to the left of ‘Booking Accommodation’ and double click on the relevant fields to insert the code into the report, e.g. Host Id, Forename, Surname.

Alternately, highlight the required field(s) and select ‘Add’

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Add the Group Name field to the report:


To add the criteria to the group name field click on the criteria box as shown above:

Find the group name and highlight it in the list.

Select “Set>>>”

Selected Criteria = Equal To ‘group name’



Select Close

In order to find just the students who have been booked with a host family you will need to add the field ‘Accommodation – Booking Status Name’ to the report:



Add Criteria to this field by clicking on the criteria box as shown above.

Highlight “Booked” and “Changed”
Select “Set>>>”
Selected Criteria = Equal To ‘Booked’ Or ‘Equal To ‘Changed’



Select Close

At least one **sort field** must be added to the report:

When the report selection and criteria is completed select **SEARCH**.

This will display a list of hosts with students based on the report selection.

**Merging the host family confirmation letters:**

Select “**Send Document**“



**Master Document**: select the master group host family confirmation document

**Send By**: Default – this will look at the host families send method and if a host is set to email the document will be emailed and if a family is set to printer the document will be printed.

If you wish to print all documents change to printer.

**Send To All:** tick this to print the confirmation letters for all selected host families.

**Send Now**: the documents will be produced now



Select **OK** to email/print the host family confirmation letters for the group as a batch.

**Note**: If the email option is chosen and a message is displayed similar to the one below showing an id number and Email Address is Required, please ensure you have included the field in your report: Accommodation – Booking E Host Booking Id

(see page 4 above)

