

Managing Leavers

Overview

A leaver is someone who has booked on to a course, attended some lessons and then decided they do not want to continue. A leaver may have paid in full, partly paid, or not paid.

Removing a client from a course and lessons

If a client is leaving a course, they will need to be issued a credit for unused lessons, and removed from the course. Here are the steps:

Part one removes the client from the fourth coming lesson.

1. Go to the client's **CDS**
2. Press **History**
3. Press **Lessons**
4. **Deselect** the lessons that they no longer require
5. Press the **Confirm** button

Part two removes the client from the course.

1. Go to the client **CDS**
2. Press **History**
3. Press **Edit**
4. Set the **Result** to **Left**
5. Press **Store**

Understanding Credits

If SwimSoft Online is set up to create invoices as clients are booked into lessons, the system will determine what lessons the client had paid for and issue a credit for them.

Important note: The amount you refund a client should be decided by you, based on your terms and conditions. SwimSoft has simply calculated the value of the lessons that the client will not be attending.

If bills are created manually, the amount the client is due will have to be calculated manually.

Managing a refund

SwimSoft can not issue refunds, these must be made from your bank or another similar system based on credits and your policy.

Credits are viewed by pressing **Credits** in the client's **CDS**.

1. Write a note (**CDS – Notes**) to say 'User **X** issued a credit to **Client Y** by (**bank transfer, etc**) on **date**', this way you will have a record of when and how a refund was issued.
2. **Delete** the credit or credits from the **Credit Section** of the **CDS**

Collecting an outstanding fee

If a client has not paid for their lesson(s), you will need to amend their outstanding invoice and update the course result to *Left*.

To amend the invoice, from the **CDS** press **Invoices**, make a note of the outstanding Order number and press **Manage Invoices**, press the **expand** button next to the order and press the **red cross** against the lessons the students will no longer be attending. You can send the amended invoice to the student by pressing the **Create Comm** button next to the invoice in your invoice section of the CDS and sending the email from the email preview.

Finally, you will need to remove the student from the course by pressing **History** under the **Courses** section and Press **Edit** against the relevant course, changing the **Result** to Left and pressing **Store**.

(Not recommended) Deleting a student midterm from a course

If the client has paid and attended some lessons and you press the **Delete** button in **Course History**, they will be issued two credits. The first credit will be for the lesson that they have attended, and the second for lessons that have yet to be delivered (future lessons). SwimSoft splits the refund into two credits, so you can decide if you want to give a full or partial refund and, more importantly, how much to refund.

If you refund the client we recommend you delete the credit(s) and write a note to say 'User X issued a credit to client Y by (bank transfer, etc) on date', this way you will have a record of when credits were issued.

Please note, if you use the delete button, you will have no record of the student attending the course.