

## System Configuration – Adding clients

### Your Options

Client data is entered into SwimSoft using one of two methods they are:

- By the client via the Client Hub
- By SwimSoft users manually

Please note that MOR Solutions no longer imports client data because of potential issues surrounding the movement of data and GDPR.

### The Client Hub

The Client Hub is a series of web pages designed for your clients, they enable them to view and manage their families; details, courses and lessons on their phones, tablets and computers, individual adults also can create a Client Hub account which will, in turn, be used to manage and view all of their information.

The process starts with an adult or key family member, navigating to the Client Hub registration page. The URL for this page can be found by pressing **System Configuration** then **Client Hub Administration**, you will find it in the final section of the page.

Once a client has completed the registration page they will be sent a verification email and prompted to add other family members details, as they enter these details you will be sent email notifications advising you to log in to SwimSoft. To see and manage your clients and their enquiries in SwimSoft select **Students** on the Main Menu and then **Enquiries**.

Before you issue or publish your Client Hub URL you need to configure it, during the process you should define your terms & conditions and brand the default email templates. Guidance on completing these tasks and getting the Client Hub set up can be found by pressing **System Configuration** then **Client Hub Administration** once on the administration page press the **Help** text found on the top right-hand side of the page.

## Adding Students

There are seven pieces of information that you need to record when adding a student to SwimSoft, we've listed them below and we'll discuss them in more detail as we proceed through this document, they are:

- General information
- Address
- Contact information
- Class and waiting list
- Payment method
- General notes
- Health notes

As you enter students onto the system you will find that SwimSoft performs a few checks for you. They are designed to stop you from creating duplicate client records and to link the client to a family where appropriate, specifically the software checks...

- Has the student been entered into the system previously?
- Is there a student on the system with similar details?
- Is there a family with a similar name on the system?

These simple checks keep your data clean and tidy and minimise duplication.

## Getting Started

On the **Main Menu** press **Students** and **Add**, you'll be presented with a simple page where you need to enter the student's name and, if you have it, their date of birth too. Once you've entered this data press the **Proceed** button.

### Check One

At this stage you are not entering a student into the system, you are simply performing a three-part check to see if they have been registered previously. The checks are as follows:

#### Part 1

Is there an identical entry in SwimSoft? If there is, you will see a page saying potential duplicate entry. Some names like John Smith are a little more common, so care should be taken to check the information you see on the screen.

#### Part 2

The second part of the first check is to look for clients with similar surnames and display these. This is to help you spot records where the client has been entered before but the first name has been spelt differently. Names like Sarah can be spelt two or three ways, so by displaying a list based on the surname means that you will see all the *Sarah's* on the system.

### Part 3

During the third stage of the first check, the system will find people with an identical date of birth, this is particularly useful when people have unfamiliar or complex names to spell.

These checks help prevent you from creating duplicate client records, it is not foolproof so we always advise you to spend a little bit of time checking the system before entering clients data. We recommend performing a search on the email address you have been provided, as it is not uncommon to find the parent is already listed on the system linked to a sibling, if this is the case then you should proceed to the families datasheet and press the **Add Student** button.

#### Check Two

The second check that SwimSoft runs is to determine if any other family members may have been entered onto the system previously, once again you will be presented with a list of potential parents and siblings. If you can see a parent or sibling, press any of the buttons located in front of the family members name and this will link this new member to that family.

#### After the checks

After both the checks have been performed, SwimSoft will open the student data entry page.

#### Entering General data

If you're entering details of students who are aged 16 years or under, use the titles Master and Miss (child), these will trigger SwimSoft to ask you for parent or guardian information and in due course will ensure that the pronouns in your communications are set correctly.

Enter the students first and last name, note the **Prefers** field is to enable you to record what a child likes to be called, (ie Elizabeth is normally called Lizzy) this information will appear in multiple places across the database so that both administrators and teaching staff know the child's preference.

Next enter the student's date of birth, the age will be calculated automatically, this field is optional but we strongly recommend that you complete it for children. It's not necessary to have this information for adult swimmers.

The student's membership type will have been set by default, change it if necessary.

#### Address

You are required to record the client's address details, these are used to help differentiate between children and adults with similar names and from time to time just to cross-check that you were dealing with the correct family.

SwimSoft checks that you have filled in the 1<sup>st</sup> line of the address and the postcode, if either of these items is blank, you will be warned and asked to complete them.

## Guardian or Contact Details

Once you have entered the student's details you will either be asked to enter a guardian's details or if the student is an adult, record their contact details. This process is completed by either pressing the **Add Guardian** button or entering **contact** details.

## Courses and Waiting Lists

The next step in the process will be to select a course or waiting list, if you are placing a student onto a course please make sure you select all the lessons that they need to be invoiced for.

## Payment Methods

The next section explains what the various payment methods are and what, if any, setting changes you need to make. The options are as follows:

### Cash/Cheque/Card/Other

Leave the system set to **cash cheque card or other** if you have not agreed on any particular payment method with your client.

### Payments Online

Payments Online is a system whereby you send a client an email that contains a link to a pre-filled shopping basket. When they follow this link they will be able to view the payment they need to make and pay you via PayPal. If you plan to use this system, selecting the Payment Online option will trigger SwimSoft to create the special emails that you need to send to your clients. It should be noted that you need to have a PayPal account and configure SwimSoft before using this option and that no emails are sent to clients automatically, you will have to release them.

### Direct Debit (Do Not Use)

Whilst SwimSoft can collect fees via Direct Debit they need to authorise a mandate to enable collections, this payment option will be set for you automatically once they authorise collection. If a client decides to cancel their mandate, the payment method will be returned to the default setting which is **cash cheque card or other**.

### Standing Order (Do Not Use)

Please do not select this payment method. We only use **cash cheque card or other** when creating a student. This is an old section of the system that is no longer used. This was used for our clients that used a legacy system. If your client pays you by standing order, we will show you how to configure SwimSoft under our financials instructions.

### Generate Invoice

By default, this setting is on, as you would expect SwimSoft to create invoices for students that are booked onto courses. However, you can override this and turn invoicing off. You may choose to do this if it is your child swimming or somebody you simply don't want to charge.

## General Notes

This section is provided for you to make whatever notes you may need. Notes can be seen in a list form by pressing **Students** and **Notes** or on the **Client's Data Sheet** in the **Notes** section.

## Health Issues

If the student has no health issues or none have been reported to you, you should set the drop-down to **None**. If however a health issue has been reported, you can choose from the pre-populated list or use the text box provided to record any key data. This data will be shared with instructors so they are fully aware, and if the client has a **Client Hub** account, they will be able to see what you have recorded.

## Other ways to place a student onto courses and waiting lists

Up until now in this document, we have focused on how to add students to SwimSoft in bulk when setting up a system and we touched briefly on adding them to a course. There are multiple ways to place a student onto the system and, in turn, a waiting list or course. They are as follows:

If you just want to add a student without doing anything with them, press **Students** and **Add**.

If you want to add a family member when you are in a families **Client Data Sheet**, do this by pressing **Add Student** or **Add Guardian**.

If you want to check spaces before adding a student, press **Courses** then **Place availability**. Next choose a **Class Type** to see a list of all your courses, select the course you want to place the student onto then add them by pressing the **add student** button at the bottom of the page.

If you have a lot of students to add to a specific course, press **Courses** and then **Search**. Next, you will need to **Select** the course you are interested in and add the students one at a time by pressing the **Add New Student** button. You'll find that after you have entered a student you will return to the same page to repeat the process.

When it comes to adding students to the waiting lists, this can be achieved by pressing **Students** and **Add**. If the student is already on the database you can do this by going to their **CDS** and selecting the **Waiting List** option on the left-hand side, from here you'll be able to choose the class type that you are interested in.

If you have been adding students to the waiting list, you can access it by pressing **Students** on the **main menu** and then **Waiting List**. Once you have entered the master waiting list menu, you can choose the **Class Type** you are interested in and manage clients once again.

It should be stressed that whilst you are adding students to Courses, no communication will be sent. Communication always needs to be authorised for release, this means that you can add students to courses and change your mind without the client ever knowing that you had made any changes.