

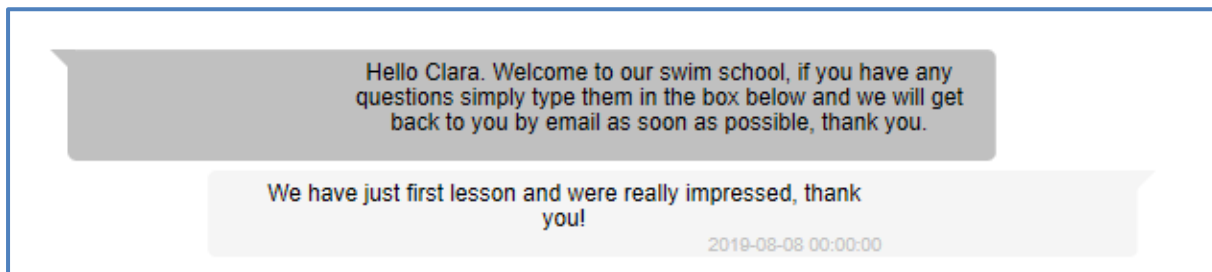
## Client Hub – Overview Information for Administrators

Looking after hundreds of clients and answering all their questions is time-consuming and so SwimSoft Online's **Client Hub** web application has been developed to allow clients to obtain answers to a variety of questions without having to contact you, questions such as...

- When does swimming start?
- Is there a lesson this week?
- What am I booking into?
- And am I on the waiting list?

It also allows clients to keep their contact data up to date, once again meaning that they don't have to contact you if their email address or mobile number changes, all they need to do is log in and change their details.

**Client Hub** also contains a very useful messaging system. If a client has seen a message via the system, the messages get recorded in SwimSoft's 'message' section and, from there, it's easy for a team to respond to a client and mark the message as 'Done', thus helping administrators keep track of which messages have been processed and responded too. The message system keeps all communication in one place making it easy to see what has been said, more so if you work with a team of administrators as everybody can see all communications. Messages are displayed as per the image below.



To obtain the most of the system we recommend clients are sent an email detailing what **Client Hub** can do for them, so that they have the choice to look for answers to their questions online, as opposed to always having to contact you. **Client Hub** contains a seven-item menu that groups information, as below.

1. **Family** Names and contact detail for family members.
2. **Waiting List** Basic information detailing who is waiting for what.
3. **Lessons** Venue, dates, times, contact details, and a link to Google Maps
4. **Awards** View progress and comments and purchase awards too.
5. **Messages** A direct message system to connect the client and the administrator.
6. **Health** Issues record to aid the safe delivery of lessons.
7. **Passwords** The access management page.

More detailed information can be found in each section below

## Section 1 – Family.

Client contact data is always changing and **Client Hub** allows your clients to keep this information up to date. So, whether they have; a new mobile number, email address, or, you've spelt a name incorrectly, they can change their details any time they choose and they don't have to bother you at all!

## Section 2 - Waiting list.

The **Waiting list** section of **Client Hub** allows clients to check they are on the appropriate list. All clients are booked on to waiting lists in a strict chronological order, allowing you to contact clients as soon as a place becomes available.

## Section 3 - Lessons.

This section shows clients a list of lessons to which their family has booked, they'll see the *Day, date, time, Activity, location, and instructor* relating to each lesson, so they'll know what is happening, where, and when, note that items written in italics can be suppressed, meaning that, for example, don't know who will be teaching a group the Instructor information can be hidden. If they are using the system to review two or more family members, they can review all lessons by date by clicking the '**View by Date**' button, or, students by clicking the '**View by Person**' button.

## Section 4 – Awards.

The award section is designed to give clients feedback and allow them to request or order certificates if you are configuring the system you will find you have 7 options, they are...

- Activate Client Hub Awards Page When this button is set to off clients can't any award information, we recommend that this item is set to off whilst commissioning awards.
- Awards Progress This button controls if clients can see progress information, main the client can see what they are working towards but not their progress to date.
- View Progress Report Comments If you want to allow clients to see proofed comments this setting should be set to **On** Set this item to **On** if clients are allowed to request certificates online
- Award Request
- Create Purchase Orders This slider means that either, an order will be created when a client requested a certificate or the item will be added to an unpaid order.
- Cost of Award Use this field to set the cost of your award.

- Terms and Conditions

Use this section to define the terms and conditions associated with purchasing an award.

SwimSoft Online allows you to publish progress data continuously, or, at specific points in time, the choice is yours. Either way, the system allows you to publish progress data with clients when you want to, and in turn to manage client expectations.

## Section 5 – Messages.

SwimSoft Online's message system allows users to message you directly. When a message is sent it's recorded in our management system and a copy is emailed to your system administrator. When the system administrator responds, the reply will be emailed to the client and a copy displayed in the **message** section of the **Client Hub** application. Using this tool means all communication is kept together in one place, so you don't have to go looking through email accounts to piece together your 'virtual conversation'. This 'one-stop' point of contact allows clients and the management team to communicate easily.

## Section 6 – Health.

Lesson providers must know of any medical conditions that might need addressing during lessons, conditions such as epilepsy or diabetes. This area of the system is to ensure clients know you have a record of any medical issues, meaning staff can be briefed accordingly.

## Section 7 -Passwords.

Users can change their password within **Client Hub** using the 'Password Change', if they forget their password they can press the **forgotten your password** text on the log in page and they will be sent an email with a temporary password which they can use to access the system, they will be prompted to set a new password as they log in.