

## Activating, Configuring & Testing Client Hub

### Activating Client Hub

Client Hub needs to be activated before it can be configured and used. Start by pressing **System Configuration** and **Client Hub Administration**, initially you will see a page with an **Activate** button, pressing this will activate the system. Once pressed, you will see the Client Hub Configuration screen as per the following image.

The screenshot displays the 'Manage Client Hub' configuration page. It features three main sections: 'Client Hub Settings', 'Client Hub Email Communication Templates', and 'Client Hub Links'. The 'Client Hub Settings' section includes an email field (m.morish@morsolutions.co.uk), an 'Awards progress' toggle set to 'On', and 'Terms and Conditions' set to 'Published'. The 'Client Hub Email Communication Templates' section shows 'Complete Registration' and 'Password Reset' templates as 'Completed'. The 'Client Hub Links' section provides URLs for the 'Login Page' and 'Registration Page' with 'Copy' buttons. At the bottom, there are 'Exit' and 'Save' buttons.

### Configuring Client Hub.

There are several items to complete and you should allow an hour to complete the task, before you start you should...

- have a logo to be used in your email communication, it should be around 100Kb max.
- know the email address you want Client Hub communication email to and from.
- a PDF of your terms and conditions

### Step 1 – Setting your 'from' email address

The email address which you wish to send email messages from and to which you wish to receive Client Hub related messages, this will be used...

- To notify you when a client creates a Client Hub account.
- To notify you if a client messages you via the Client Hub
- As the from email address when the system sends copies of Client Hub messages to clients by email.

## Step 2 - Awards progress

If you want clients to see award progress data set this item to 'On'

We recommend you set it to 'Off' initially so you can check data before it is made public

If you plan to publish award data at specific times set this value to 'Off' initially and toggle it to 'On' when you want clients to be able to see progress. We recommend you email clients when progress data is available so they know they can access it.

## Step 3 - Terms and conditions

This section is split into two

The first element allows you to manage and create your terms and conditions

You'll see the button associated with the 'Manage and create Terms and Conditions' option in one of three states

- Incomplete meaning you need to write your first set of terms and conditions.
- Draft means you have a set of conditions waiting to be published.
- Published means your terms and conditions are live.

To manage your terms and conditions press this button, we recommend you enter a small text sentence advising the user to press a link entitled [View Terms and Conditions](#) this will, in turn, open a PDF which details your full terms and conditions. You can access a Knowledge Base article that shows you how to create links by pressing **Communication** and **Creating links**. Once you have completed your Terms and Conditions you must define...

- If users need to agree to them as they sign up for the Client Hub
- If users need to agree to updates as and when they are published

Once these settings have been made choose to either **Save as a Draft** (if you have not finished) or **Publish**, this will be live instantly on the Client Hub.

You can update your Terms and Conditions anytime, simply press the **Publish** button and make any amendments and choose whether to **Publish** or **Save as Draft**.

The second section of the terms and conditions section allows you to view all historic information, pressing the **View** button opens a new page which shows you all the versions of the terms and conditions that you have created over time and their current status, this being either draft, current or published, along with the dates they were current.

Given that clients will be signing the terms and conditions at different points in time, it is important to know which version the client had agreed to. SwimSoft provides you with the facility to view the specific Terms and Conditions your client has agreed to within their Client Data Sheet. This can be seen by pressing the **adult's name**, then press **Client Hub**, you will now be able to see the date and time and version of the terms and conditions the client agreed to.

## Step 4 - Complete registration email template.

The complete registration email template is used in two circumstances.

- The first is when clients create themselves a Client Hub account online
- The second is to exact to invite your existing customers to use the system

in both cases the template needs to be created and ideally branded.

You can invite clients who have been added to SwimSoft to use the Client Hub by email. We have created a 'group action' that can be run for each location and activity.

Press the button on the right-hand side of the page which will typically say incomplete, then press the button marked load default template, now add your branding and check the other elements such as the subject line and the from address or to your liking. Press the save button when everything is in order, if you can't press the save button because it's greyed out it means that you have not checked the from email address, you need to enter the from email address box make a change, ensure the address is correct and then you will be able to press the save button.

If you plan to invite existing clients to use the Client Hub use the group action called **Create Client Hub Login**, This will create an email for each adult in a family who has not registered for a hub account and place it in the appropriate client communication system. The email body will use the email template created in this section.

## Password Reset

It's normal for users to forget passwords, this section contains the forgotten password email template, we suggest you don't change it much but you might like to add a graphic to brand it.

## Login Page

You can place this link on your web site, it will make it easy for clients to find the URL to log into the system.

We suggest you add the text 'Use this link to log into your 'Client Hub' account' on your web site above the URL/button.

## Registration Page

The registration page URL has two functions, it allows:

- Potential clients to enter their details onto your system if they want to apply for lessons.
- Existing client to create access to their data via the 'Client Hub' by simply entering their email address and a few basic items.

We suggest you place the following text on your website above the Client Hub links.

'Interested in Lesson? Read the Interested in lessons information below, if you're looking to access your data via the 'Client hub' skip to the section headed 'Existing clients' below

### **Interested in lessons?**

Enter your (normally a parent or guardians) details, you will be emailed login information to allow you to access our 'Client Hub' system, where you can register yourself or your children for lessons and direct message us with your requirements.

### **Existing Clients**

Fill out the form below entering the email address we normally communicate to you with, we will then email you access to the Client Hub system along with instructions.

## Branding

Our developers will be happy to place an image of your choice as the background to your Client Hub account.

## Stop here?

If you're new to SwimSoft you can stop here as you have done all the configuration work necessary, if on the other hand you are an existing SwimSoft user and have just commissioned the Client Hub please read on.

## Testing

Once you have configured the previously mentioned items, the next step is to test the system. To do this you will require one client who is booked on to a course, the adult must have an email address.

### Checking a single account.

Here we're going to review and test the content of an email that we plan to send to a client, to ensure they can access the client hub and hence determine the system is working correctly.

Start by navigating to an existing clients data sheet, click on the adult in the top left of the page. Next press the **Client Hub** menu option which is the lowest menu item, click the **Send** button (or **Reset** if you have previously pressed the send button), this will open the reset email template, you may want to press the four arrowed cross button to maximise the page, from here...

1. Open a new browser page
2. Copy and paste the URL shown from the email into the new browser page
3. Copy and paste in the username
4. Copy and paste in the password

If all is well you will have access to the client's Client Hub account, you can use this to familiarise yourself with the Client Hub system. Try making the changes suggested below in the test client's data sheets and viewing them in the Client Hub.

- Adding health issues
- Placing the client on a waiting list
- Scoring and award and viewing progress
- Sending a message from the message system

## Client Messages

You will be able to see messages sent by clients by pressing **Students** and **Client Messages**.

You can respond to a client message by navigating to their **CDS** selecting the **Client Hub** option, writing a message and pressing **Send**

If you have responded to a client message you can press the **Done** button on the **Client messages** page, this will remove the message from the list but the original will still show in the client's CDS specifically in the Client Hub section.

## Sending Client Hub invitations to clients

If you are satisfied with the result you see the next step is to send a few Client Hub invitation emails to your clients, using the group action system. This is achieved by pressing **Courses** and **Search**, at this point we recommend you restrict your data set to a modest amount of clients, say 20. Click **Groups Actions** and **Create Client Hub Logins**. Once the process has run you will find email job tickets in the **Manage Communications** system ready to be proofed and sent. View at least one email and check that the URL and login information works, if you see the **Change Password** page all is working to plan.

We recommend you send a few emails at a time waiting a few hours between batches as this email is likely to trigger clients to call you about other issues! Continue to send out invitations emails until all have been sent.

## Useful Tips

If a client sends you a message you will get an email, you can view these messages in SwimSoft By pressing **Students** and **Client Messages**.

If a client enquires about lessons you will get an email, these emails can be seen and managed by pressing **Student** and **Enquiries**

If a client account fails to work press the **Hard Reset** button found in the **Client Hub** section of the clients **CDS**. This will delete the client's Client Hub account login information but not general client data. To create a new account for the client press the **Send** button and then send them the email created for them.