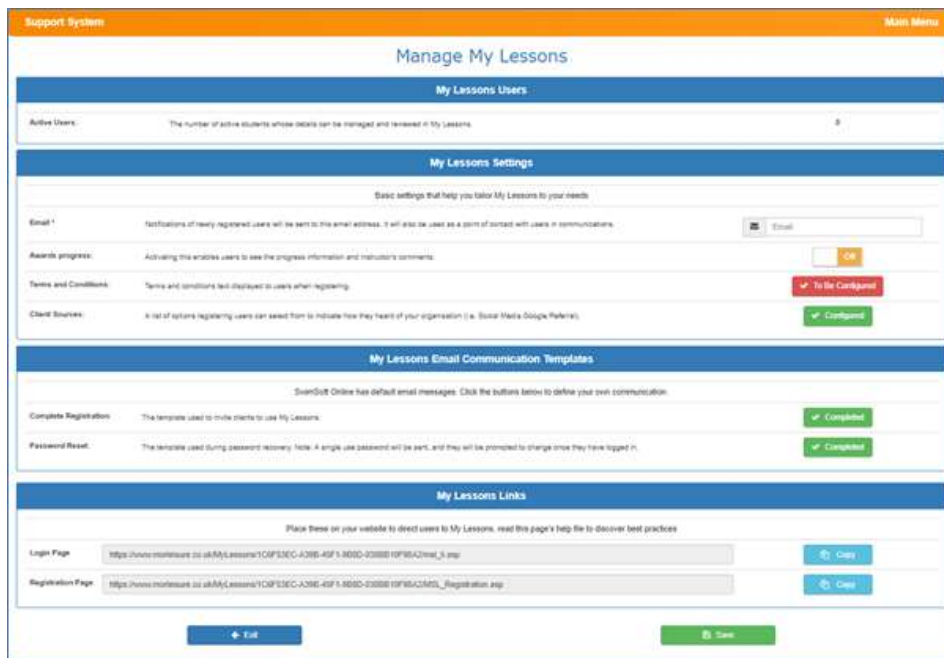


## Activating, Configuring & Testing Client Hub

### Activating Client Hub

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



### Configuring Client Hub.

#### Email

The address from which you wish to send email messages and to which you wish to receive messages, this will be used;

- If a client creates a Client Hub account
- If a client messages you.
- If you message a client.

#### Awards progress

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

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.

## Terms and conditions

Clients can use Client Hub to register for lessons, use this section to publish your terms and condition. Clients' will have to agree to these to proceed and create an account.

## Client Sources

This feature is only partially live but, in due course, it will give you an insight into where your business is coming from. Set your lead sources here.

## Complete Registration

You can invite your clients to use the Client Hub by email, we have created a group action which can be run by each location and activity. The groups action is called **Create Client Hub Login**, This will create an email for each adult in a family who has not registered and place it in the appropriate client communication system. The email body will use the email template created in this section. You can use our default template, or, create your own. Important note: Ensure the email template has a link to the Client Hub user guide and or You Tube Video to enable clients to learn about the system!

## 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 on to your system if they want to applying 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 Registration link.

'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, we will then email access to our system 'Client Hub', where you register yourself or your children for lessons and direct message 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.

## 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.

Navigate to the client's datasheet, 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. Paste the URL into the browser
3. Paste in the username
4. Paste in the password

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

You will be able to see messages set by clients by pressing **Students** and **Client Messages**, or under Client Hub in the client's CDS Navigate to the Client Hub section of the client data sheet to respond, or, click the 'Done' button to remove the message from the Client's Messages list.

You can also delete unwanted messages from the Client Message page accessed from the **students** menu the 'Client Messages' screen too!

## Sending Client Hub invitations to clients

If you are satisfied with the result you see the next step is to send a few invites 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 manage communications system ready to be proof 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 lesson 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 clients Client Hub account. To create a new account for the client press the **send** button by the send Invitation text.