CLIENTHUB

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.

Configuring Client Hub.

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

- Know the email address you want Client Hub communication to email to and from.
- A PDF of your terms and conditions.
- Know how to add a logo to a document (**Main Menu** – **Help _ communication** – **B How to add a Logo or Graphic to an Email**).
- Have a logo to be used in your email communication, it should be around 100Kb max
- Know how to add a link to a document (**Main Menu** – **Help - Communication** – **Links and attachments**).

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Step 1 – Setting your 'from' email address

The email address from which you wish to send email messages and to which you wish to receive Client Hub related messages, 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 - Terms and conditions

To define your terms and conditions press this button on the left-hand end of the '**Manage and create Terms and Conditions**' element, 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 that details your full terms and conditions. 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, make any amendments and choose whether to **Publish** or **Save as Draft**.

Once and only once you have defined your terms and conditions you will see a second button labelled 'View' to the left of the text 'View current and historic Terms and Conditions' text, 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, along with the dates they were current.

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Lesson Information Control

Below is a screenshot of the Lesson information page in the Client Hub, by default all columns are shown to clients, however, you can suppress the Activity, Location, and Teacher's name using the sliders shown further down this page.

Don't forget to press **Save** a the bottom of the page to save your changes

Step 4 – Award Settings

The awards page will look similar to the image below, the controls and their function are listed below

- Activate Client Hub Awards Page   When this button is set to off clients can not 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

- View Progress Report Comments   If you want to allow clients to see proofed comments this setting should be set to *On*

- Award Request   If clients are allowed to request certificates online set this item to *On.*

- 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.

Step 5 - Communication

Two templates need to be completed in this section they are called 'Complete Registration' and 'Password Reset'.

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 invite your existing customers to use the system.

In both cases, the template needs to be created and ideally branded using the techniques detailed in the knowledge base.

You can invite clients who have been added to SwimSoft to use the Client Hub by email. We have created a special 'group action' called that can be run for each location and activity. To learn about the **Create Client Hub Login** group action please read the **Group Action** section in the **Course** section of the **Knowledge Base.**

Press the button on the right-hand side of the page which will say **Incomplete** initially, 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* are 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 Edited the 'from' email address. You need to enter the *from* email address box and edit it, ensure the email address is correct and then you will be able to press the **Save** button.

The 'Password Reset' email template is sent to users who forget passwords, we suggest you don't change it much but you might like to add a graphic to brand it.

Step 6 - Login Page

You can place this link on your website, 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 website 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 clients 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 and 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 use to communicate with you, 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.

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 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 **Create** button (or **Delete Client Hub**) if you have previously pressed the send button). The **Create** 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 in SwimSoft and viewing them in the Client Hub.

- Adding health issues
- Placing the client on a waiting list
- Place the client on a course
- Sending a message from the message system

We recommend that the awards section is left turned off until you have a good understanding of the awards and progress 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 already register on SwimSoft

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, click **Group Actions** and **Create Client Hub Logins** and follow the on-screen instructions. Once the process has run you will find emails 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 invitation emails until all have been completed.

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 **Delete Client Hub** button found in the **Client Hub** section of the client's **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 **Create** button and then send the email created for them.

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