

Creating Crash Courses

Before you start

This document assumes that you know how to make courses on a day to day basis and generally run SwimSoft, if you do not, please either read the **Configuration Documents** in the **Knowledge Base** or contact the support team for assistance.

General Information

A crash course is an activity in its own right, and as such you will have to create an area within SwimSoft to store all the information. Crash courses must be built from scratch as they cannot utilise the re-enrollment system. Once you have completed the first three steps of configuration, you will find that you have a new location activity button on SwimSoft **Main Menu**, you'll be accessing this to create and manage your crash course

Getting Started

If you have not run a crash course before, follow these instructions step by step. You don't have to complete all the steps in one go, but you must do them all and in order. Please note that only administrators will have access to the menu options referenced below. The steps below are going to point you to the pages that you need to access in SwimSoft, we will assume that you know how to use each page, if you don't you'll find there's a **Help** button relevant to each page to guide you.

Step One – Activity Creation

You need to gain access to SwimSoft's **Main Menu**, this is achieved by either simply logging in or if you operate multiple locations and activities by pressing any of the **Location & Activities** buttons you see when you log in. At this point, it does not matter which one you choose.

Press **System Configuration** and **Manage Activities**, check the list in front of you and look for the words 'Crash Course'. If you're presented with a long list of entries it is worth using the **Search** found in the top right-hand corner of the page, take a little time and search thoroughly as you don't want to create a duplicate entry. If you can't find an existing entry called 'Crash Course' press the button marked **New Activity** and create it. If the words 'Crash Course' is listed simply move on to Step number 2.

Step Two – Locations

This is where we define which locations the crash course will be running at.

Press **System Configuration** and **Locations**. Under the column Activities, press the button and use the **Active Yes/No slider** to switch on the Crash Course at the chosen venue and press exit. Repeat this process if you plan to run crash courses at multiple locations.

Step Three – Defining the Location and Activity.

You have now built your new location activity but you're not actually in it, if you look at the top left-hand side of the page you'll see it says something completely different, you need to access the new location activity to start the course creation process. Press the **Main Menu** button then press on **location and activities** and select the new location and crash course option you have just created. The top left-hand side of the page should now show this information.

Step Four - Location and Activity settings.

This is where you're going to define who will be running the crash course and how people can contact them. Return to the **Main Menu**, press the **Locations & Activities** button and then press the **Gearwheel** to the right of the crash course. This will open up the **Location Activity settings page**. Simply start at the top of the page and work down completing all the details.

Step Five – Creating a term

Press **Terms** on the **Main Menu** and then press the **Create** button. This opens the Terms management page, next press **Create Term**, as always if you're not sure what to do press the **Help** button. Generally speaking, the start date will be the first day you plan to run lessons and the end date will be when they finish, press the **Exit** button once you have created your term.

Step Six - Defining start days.

In this section, you are going to define your crash courses start days, for example, if you are going to run lessons from Monday to Friday all you need to do is activate Monday, if lessons will be running from Wednesday to Sunday activate Wednesday.

The actual activation process is completed by pressing **Activity Configuration** and **Days** and **ticking the days required** before pressing **Store**.

Step Seven – Choosing your team

In this step, you're going to be defining who's going to be delivering the Crash Courses. Press **Activity Configuration** then **Activity Personnel**, simply **select** the team members you need, your selections are saved automatically as you make them. We are assuming that the team members have been added to the system, if they have not, press the **Personnel** button at the bottom of the page and add them.

Step Eight – Building Courses

You will now be in a position to build your crash courses, these are constructed in much the same way as any other course and if you want full information on how to do the basics press **Courses** and then **Create a course**.

By default SwimSoft builds courses to run on a weekly cycle, crash courses are often daily and as such need to be configured manually.

The starting point is to set the **day of the week** to the day of the first lesson, once you've done this review the **start and end date**, making corrections where necessary. Then make sure the **number of lessons** is correct, the next step is to set the **Lesson frequency** to **Daily**, once you have completed these tasks press the **Add Course** button. The final steps are to press the **Lessons Tab** and then the **Recreate Lessons** button, if you are happy that the lesson dates are correct, move on and check or set your pricing. Remember to **Update Course** if you have any

Pay special attention to the **Pricing Tab** and make sure you have defined the prices you want to charge, this part is often overlooked and will mean that you can't book a student onto a course.

Tip: If you are running a crash course over several weeks, it is a good idea to name your class types to include the week number, ie beginners week 1 and beginners Week 2. This way when you come to booking students, you'll know exactly what type of class you're looking at and which week it will be running.

Step Nine - Activating Direct Debit

If you want to collect students fees by direct debit, you have to define which system or account you want to use, this sounds complex but in reality, most people only have one and all that you need to do is press **DDM Management** on the **Main Menu** then select **DDM Setup**. Once the direct debit page is open press the small button in the **Location Activities** column, this, in turn, will open the configuration page you need, find your crash course switch and set it to **Yes** before finally pressing **OK**. Once you have completed this task you will be able to collect fees by direct debit, if you forget to complete this step your direct debits will error and will need to be re-released. See the **direct debit troubleshooting** manual if you need assistance.

Step Ten – Creating Communication

One of the final steps of setting up a crash course is to activate and configure communication. In most cases, all you'll want is an Invoice, Invoice DDSO and potentially Receipt email. All of these items are defined by pressing **Client Communication** followed by **Activity Communication**, once again full information on how to define documents can be found in the **Help** section of the page.

Step Eleven – Creating a Waiting List

Once you have finished configuring your Crash Course, you will now be able to add students to the waiting list associated with it. To do this, you will need to go to the client's **CDS** and from here you have two options.

Option number one is to press the **Add** button under the **Courses and Lessons** section in the left-hand column. From here, press the green **Add to Waiting List** button associated with the relevant Crash Course.

Option number two is to press the **Waiting List** option in the left-hand column. Press the blue **Select a Waiting List** button, and again press the green **Add to Waiting List** button associated with the relevant course.

To view the waiting lists, go to **Students** on the **Main Menu** and then **Waiting List** on the **secondary menu**. Here you will see the waiting lists for courses associated with the current location and activity. If you have placed students on a waiting list, the **select** button next to it will be blue and you will be able to press it to view all the students and the date that they were registered etc.

If any aspect of this manual needs improvement, please email support@morsolutions.co.uk with your suggestion(s).