Creating and Managing Terms

All activities are run at a location over a period of time, we refer to these periods as 'Terms'. You have complete freedom when defining the length of your term, this could be anywhere from one week to fifteen weeks. A crash course term may only be one week in length or if you are running in line with school terms, they make go up to twelve weeks.

The Terms page is used to Create and Manage Terms for the current Location and Activity that you are working in.

The **Terms Managements** page can be accessed in one of three ways, you can either press **Activity Configuration** and **Terms**. Press **Terms** on the **Main Menu** and then select the **Manage** button found at the bottom of the page and finally, you'll also find that you can access the page during the re-enrolment process.

Creating your first term

If you are entering this page for the first time, no terms will have been created and hence there will be very little to see. Press the **Create Term** button to create your first term. If you are not an administrator, you will have to contact them to perform this function for you.

Term	This field helps you identify your terms on a day to day basis. You may enter values like Spring 09, Autumn 10. The system will not allow you to enter certain special characters, you are not able to use apostrophes and ampersands.
Date of First Lesson	This is the date of the very first lesson.
Date of Last Lesson	The date of the very last lesson
Payment required by	This is the date by which clients must re-enrol or risk losing their place in the course. If you are using Payment Online client will not be able to use the system after this date has passed. If you are using GoCardless this date will be used as the default collection date.

'Current' Terms explained

Over time, administrators will create many terms. SwimSoft is designed so that when an activity and location is selected, the current term is selected and set automatically as well.

It should be noted that if Instructors log into the system, they will only see information related to the current term, meaning they only see information that is current and relevant.

When it comes to re-enrolment, new courses will be based on the courses running in the 'Current' term. So, if you have five beginner courses running in your first term, when you perform your re-enrolment, the system will create five new beginners courses.

Clients using the Client Hub will only see course information relating to the current term, so administrators are free to plan and construct new courses and lessons without clients seeing them.

Pricing

The pricing button gives you quick access to the pricing relating to the term you have selected, take care to ensure you press the correct button as you navigate from this page to the pricing matrix.

Note that changing the pricing will not change orders that have already been created, the new price will only be used for new orders and bookings.

Note SwimSoft does have the facility to update all unpaid orders in a term Under **Financials** and **recreate orders**, the system is used to apply a price increase or correct errors.

Days

The **Days** button is used to review the term dates and to exclude days where lessons can't take place.

Once again if you change days and dates you will not be changing existing courses, what you will be doing is changing the default values to be used in the future. Generally speaking, dates should not be changed once students are placed onto the courses.