Group Actions

SwimSoft has a feature that allows you to execute an action meant for a group of people, all at once. This feature comes in handy in situations like venue closures when whole days of lessons need to be cancelled, issuing credits in bulk, due to said venue closures, and creating Client Hub logins for all your organisation's clients.

Press **Courses** on the Main Menu, and then press **Search** on the secondary menu. This will take you to a list of all your courses. Using the filters on the left-hand side you can refine your search to only show courses which require action.

All filters are shown here.

Click here to expand a course and see all students booked in.

Group Actions button.

For example, it snowed on a Monday morning and so all lessons for that Monday have been cancelled. Using the day filter on the left, sort the days so you are only being shown Monday's courses and then press the Group Actions button at the bottom of the filters list.

Pressing the **Group Actions** button will take you to the following page. You can choose what action suits your goal best. In the circumstance of a same-day venue closure, we recommend sending an SMS message as this will be delivered directly to parent's/guardian's mobile devices so they are more likely to see it in time.

Press the **Select** button next to the action you want to complete.

Brief descriptions of each Group Action.

	Group Action	Description
Select	Send SMS	Send an SMS to all the students selected
Select	Send Email	Email to all the students selected or export the data.
Select	Create Order	Create a manual order for each student selected by the group action. A screen is provided to allow the description of the order, payments due by and amount to be specified. The amount is defined per membership type.
Select	Add Item to Existing Order	Add an item to an existing order for each student selected by the group action. A screen is provided to allow the description of the item and amount to be specified. The amount is defined per membership type.
Select	Student Data for Export	Allows you to export contact information and outstanding fees.
Select	Credit	Helps you issue credits 'en mass'
Select	Email Data	for Robyn
Select	Generate PO Emails	This function allows you to recreate Payment Online Email requests
Select	Delete From Course	This action will remove students from courses; put a note on their CDS record and cancel the related invoice.
Select	Activate Payment Online	Set the payment method to PaymentsOnline for the selected students with a defined email address
Select	Create DDM Authorisation Request	For the selected students, you will be presented with options to configure the DDM description and maximum value. On completion, emails will be sent to each student requesting that they authorise payments via DDM.
Select	Create Invoice Schedule	Create an invoice schedule for all students. You will be presented with the controls to define the invoice schedule type, amount etc.
Select	Create My Lessons Login	Create a Login to My Lessons and Generate a Username and Registration Code for the user to complete their Registration with
Select	Change Membership Type	Update the membership type of the selected students.
Select	Add Students To Lessons	Ensure students are set to attend particular Course Lessons. Only select one course at a time.

Pressing the **Select** button next to the desired group action will redirect you to a list of students that will be included in the group action selected. Press the green action button at the bottom of this page to perform the selected group action. The most used group actions are Send SMS, Send Email, Credit, Create DDM Authorisation Request and Create My Lessons Login.