

## How to Search for a Course

The **Courses** and **Search** facility has three primary functions. The first is to manipulate courses, the second is to change student's settings and the third is to contact people en-mass.

Once you've gone to **Courses** from the **Main Menu** and then pressed **Search**, you will be presented with the page below.

The screenshot displays the 'Courses' search results page. On the left is a 'Filter summary' sidebar with various filter categories. The main area shows a table of courses with columns for Day, Time, Class, Teacher, No, Mins, Section, and Notes. Below the table are export options (Copy, CSV, Excel, PDF, Print) and a 'Showing 1 to 9 of 9 entries' indicator. At the bottom right, there are buttons for 'Create Course', 'Exit', and 'Old Version'. A callout at the bottom right points to a 'Notes' icon in the table, indicating where to add notes to individual courses.

**Filters to refine your search.**

**Expand courses to see which students are booked in.**

**Press here to configure and/or edit course settings.**

**Ability to export the data to an external system.**

**Press here to Create a New Course.**

**Press here to add notes to individual courses.**

On the left-hand side of the screen, you will see a list of filters. These can be used to refine your search to find the desired courses easily and efficiently. The various filters include Day, Class, Start Times, Teachers, Pools, Course Number, Payment Status, Student Status, Membership Types, Age and Payment Method.

### Group Actions

At the very bottom of the list of filters, you have the option of a **Group Action**. This will take all students who are on a selected course/courses and you will be able to complete an action for all these students at once.

Group Actions		
	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.

The **Group Actions** page has two columns, one says what the Group Action is called and the other gives a brief description. Press the **Select** button next to the Group Action you wish to carry out and you will be taken to the next step.

### Configure button

The **settings wheel** in the configure column of the Search page is for editing or configuring course settings.

**Manage Course - Course No : 610**  
London - Swimming Original - February

Class type <input type="text" value="Stage 1"/>	Start date <input type="text" value="02-Feb-2022"/>	Pool / Area <input type="text" value="Main Pool"/>
Start day <input type="text" value="Wednesday"/>	End date <input type="text" value="23-Feb-2022"/>	Section <input type="text" value="Section A"/>
Time <input type="text" value="04:00 PM"/>	No of lessons <input type="text" value="4"/>	Register <input type="text" value=""/>
Duration <input type="text" value="30"/>	Lesson frequency <input type="text" value="Weekly"/>	Price Differentiator <input type="text" value="Monthly"/>
	Min Class Size <input type="text" value="3"/>	Repeating <input checked="" type="checkbox"/>
	Max Class Size <input type="text" value="8"/>	Syllabus Required <input checked="" type="checkbox"/>
		Awards Required <input checked="" type="checkbox"/>

Instructors

Lessons

Syllabus

Awards

Prices

Register

Billing

Attendees

Name	Role	Lead
Willow Cassidy	Instructor	Yes
Lisa Rae	Instructor	No

[Manage Instructors](#)

Add course

Update course

Clear fields

Delete course

Navigate through the tabs to change settings within each section.

After making changes, press the **Update Course** button to ensure they are applied and saved.

You will be redirected to the **Manage Course** page. Here, you can update any existing course, add a new course, and delete courses. You will have seen this page before when first configuring your activities and courses and so should be familiar with the aspects.

## Student Settings

Pressing the **Students** button next to the relevant course will take you to the **Edit Course Attendees** page. Here, you will see a list of the students on the course, you are able to navigate straight to their **CDS**, issue them awards or delete them from the course.

If the data is available, you will be able to see if they are moving or staying at the next re-enrolment period, and what class they will be staying in or moving to.

The screenshot shows the 'Edit Course Attendees' page for course number 534. The page title is 'Edit Course Attendees - course no: 534' with a register timestamp of '01-Feb-2022 04:06:39 PM'. Below the title is a table with columns: First name, Surname, Move or Stay, Class, and a checkbox. Two students are listed: Molly Ridge and Tom Ridge. Each student row has three buttons: 'CDS', 'Add Award', and 'Delete'. Below the table is a 'Selection Processing' section with several buttons: 'Course documents', 'Show all awards', 'Hide all awards', 'Mark All As Staying', 'Mark All As Moving Up', 'Mark All As Moving Down', 'Store details', 'Add new student', and 'Exit course attendees'. Callouts provide instructions: 'Expand the students to see/edit what award and syllabus they are working towards.' points to the '+' icon; 'Navigate to the CDS by pressing here.' points to the 'CDS' button; 'Delete a student from a course.' points to the 'Delete' button; and 'Add awards the student has achieved here.' points to the 'Add Award' button.