System Configuration – Orders, Communication, Registers and the Lesson Manager

The placement process

As you place a student onto a course, SwimSoft will run a three-stage automated process in the background to save you time. The three processes are:

- Record the booking
- Creating an order
- Generating email communication

The second two stages being optional.

The Booking

Every course is broken down into lessons, when a client is placed onto a course SwimSoft records which course they will be attending along with the specific lessons that they are booked into. At this point no financial information will have been generated. Booking information is used to generate registers for Instructors, in either a paper or electronic format, and to populate the Client Hub so that client's know what they're booked into. This data is also used to create an order, if one is required.

Orders

Every order has one or more detail lines, during the booking process SwimSoft will check to see if orders are required. If they are, it will create an order as the client is booked on to a course and it will also create one detail line item for each lesson the client is booked onto. The fee charged for each lesson will be calculated based on the course configuration and the student's membership type, it all happens in a fraction of a second. Orders generated can be seen in the clients CDS, these are accessed by pressing **Students** and **Search**.

To check that orders are turned on press on **Activity Configuration** and then selecting **Address and Settings**, the **Create Orders** switch which is used to turn orders on and off can be found in the **Miscellaneous** section at the bottom of the page.

Tip: If you are configuring SwimSoft and adding students to courses, you may not want to turn orders on at this stage. It is quite common to have orders turned off at this point.

You can add additional items and credits to orders before they are sent too. Both credits and additional items can be created en-mass or individually towards a clients invoice. Instructions on how to raise credits and additional items can be found by pressing **Help** from the **Main Menu** and read the **Financials Section.**

Communication

The third process that SwimSoft will perform is to create the appropriate communication. Your emails will be held in the **Communication Section** of SwimSoft, this section is accessed by pressing **Client Communication** and **Manage Communication**, simply **Select** the document type that you are interested in and then press the **View** buttons to see individual emails. The content of these emails can be changed in one of two ways, you can choose to amend the master template by pressing the **Amend Template** button or the content of the email by manipulating the client's order. Once you are happy with your email, it can be **Selected** and **Sent**. If you have not created your templates, go to the **Main Menu** press **Help** and read the **Communication Section.**

Registers

Once clients have been placed onto courses, you can produce paper registers for your teaching staff or if you are using the Lesson Manager system (devices on poolside) the client information will show automatically when the clients attend their lessons.

All paper registers can be created by pressing **Course Documentation** and **Create Documentation** and then **Registers**. They can be viewed by pressing **Course Documentation** followed by **Registers**. Please note that registers are PDFs and these have to be created individually by SwimSoft before being bound into a pack for you, this process takes several seconds per page and hence can take a while if:

- You are producing a lot of registers
- Several SwimSofts users are creating registers at the same time,

It has been known for registers to take 15 minutes to be created at peak times, so where possible try and plan ahead and request them well before they are needed.

Individual registers can be created too by pressing **Courses** then **Search** and then selecting the course you are interested in by pressing the **Students** button. You will be transferred to a page where you can see a list of students, here you'll find a button that says **Course Documents**. Pressing this will open the local document management page where you will see two buttons, one saying **Create Register** and the second saying **Create Syllabus.** Press each of these and wait for a small while until the **View** version of the button appears, at which point the PDF has been created for you and you can view or print it.

Syllabus Information

These documents are produced in exactly the same way as registers, but instead of pressing the other register buttons as you proceed through the instructions choose the **Syllabus** option.

Lesson Manager

The Lesson Manager system is a way that staff can see course information on a device on the poolside. To use the system, team members must have an active SwimSoft online account. They should have been issued with a username and a password to SwimSoft and have activated their account by logging into SwimSoft. Once they have completed this process they can use the Lesson Manager system. The links they need to access SwimSoft and Lesson Manager can be found at **_www.morsolutions.co.uk_**

Instructions on how to use Lesson Manager can by found by pressing **Help** on the **Main Menu** and watch the YouTube video under **Lesson Manager**.