

System Configuration

Before you start

Where possible PC users should use the latest browsers and an up-to-date PC, an old browser and operating system can cause unexpected results.

Remember never to use the forward and back buttons on your browser, when you press a button on one of SwimSoft's pages the system stores key data and passes it on to the next operation. If you use the forward and back button, this key data will be lost, if you do use these buttons in error you will need to log out and back in.

Logging in

If you are reading these instructions and have yet to log in to SwimSoft Online browse to:

https://www.morleisure.co.uk/SwimsoftOnline/RO_LI.asp

TIP: You might want to save this page as a favourite before proceeding, you might want to consider creating a shortcut to it on your desktop too!

Once you are on SwimSoft's login page, enter your **user name** and **password** and elements of your **Memorable Information** as requested.

What lies ahead – Defining your operational framework.

There are various sections to be configured, expect to spend between two and three hours completing the system configuration. Naturally, the actual amount of time will depend on the size of your swim school and your typing skills.

The topics covered in this section are as follows:

- Locations
 - Activities
 - Pools
 - Sections
 - Areas
 - Sections
- Personnel
- Membership types
- Email configuration
- Client Hub administration
- GoCardless configuration (Direct Debit setup)

Location

The locations section allows you to define where you run your activities.

To access the page press **System Configuration** on the **Primary menu** then **Manage Locations** on the **Secondary menu**.

You will see one row and the location name will be set to '**Change Location**', press the **Edit** button, and set the **location name**, **address**, and the **location abbreviation**. The abbreviation is simply a four-character code used on some of SwimSoft Online's pages when there simply is not enough space to write the full name of the location.

The first line of the address and the postcode are used by google maps to direct clients to your location, so it's worth double-checking them!

Once the form is complete press **Save**.

Areas

An area is part of a location, it's the place when an activity will take place. You might define a single area if you just use a pool at a location, or multiple areas if the system is being used in a leisure complex, typical areas are...

- Main pool
- Teaching pool
- Studio 1

Press the **button** in the 'Areas Column' of the table on the **Locations** page to open the areas page. Now press the **Add New Area** to create your areas. Note, if you create an additional location you will be given the option to add areas as soon as you have saved your location's name and address, just press the **Add Area** button.

If a pool or area has never been used, it can be deleted. If it has been used but is no longer required, it can't be deleted but it can be made inactive. We recommend that you always check what areas have been created previously and made inactive before creating a new one, this is achieved by toggling the **Show Inactive Areas** indicator to the **Shown** position.

Sections

Swimming pools, halls, and studios are often divided further into sections, use the **button** in the sections column found on the **Areas** page to define them. If you are using a small pool or area which does not get subdivided, just add one section called **Whole pool** or **Whole room**. Typically you will add sections such as...

- Lane 1
- Lane 2
- Lane 3
- Shallow end
- Blue zone
- Green zone

Sections can be ordered to suit your needs by dragging and dropping the **Order number** up or down the order column.

Sections can only be deleted if they have not been used in a course's configuration.

Once you have created all the sections press the **Exit** button to return to the **Areas** page.

Once on the **Areas** page press the **Exit** button for a second time return to the **Locations** page and set your activities.

Activities

An activity is something you do, i.e. Swimming lessons; Crash courses; Diving club; Yoga.

Press the **button** in the 'Activities Column' of the table on the **Locations** to create and manage your activities.

If this is the first time you have used the system you will see one line item **Change Activity**, you should press the **Edit** button and change this entry to that of any of your activities. However, before you create your activities, read the next three sections as this should help you understand the configuration process.

An activity can have up to three attributes...

- A type (Swimming, Yoga)
- A period of time (A term)
- A document set (Email templates)

Take a close look to ensure the system is configured correctly.

Activity type

As we mentioned earlier, an activity is something you do, i.e. swimming lessons; crash courses; diving club. By splitting into these groups you can manage them independently, so if you drop diving club it won't affect swimming lessons, etc.

A time period

If a similar activity is going to be running on a different time cycle, it should be set up as a different activity. Take swimming, for example, you might run a Crash course in the summer, termly lessons in line with school terms, and book out private lessons every month to keep fees down. Whilst these could all be viewed as 'Swimming lessons', they should in this example be split into three activities to enable you to manage them. They should be split into...

- Termly Swimming Lessons
- Private Lessons
- Crash courses

Documents sets

Each activity has a document set allocated to it. For example, if you are writing to a parent about Baby Swimming you will want to talk about swim nappies etc, topics that are irrelevant when communicating about standard swimming lessons. So in some cases, you might want to split an activity based on the communication you want to send:

- Baby swimming
- Group lessons

The more activities you have the greater the system flexibility, however each activity at a location is managed as an independent item and so you should look to have as few as sensibly possible.

Activities can not be deleted, if an activity is no longer run and access is not required from the **Main Menu** to historical information, it can be made inactive. Conversely, if you decide to re-start an activity, it can be reactivated easily too by using the toggle switch found at the top right-hand corner of the page to show inactive activities. The **Active toggle** at the end of each row is used to control each individual activity's status.

You can also manage your activities from the main menu by pressing **System Configuration** and **Manage Activities**.

Defining Location Activities

Once you have created your activities and locations the next job is to define which Activities run at each location. This can be done by pressing the **button** in the 'Activities' column of the **Locations** page and using the toggle to mark the required activities as **Active**.

Once you have defined where you are running each activity, there are a few general settings to set up. These are configured in the **Locations and Activities Setting** page which we will cover next.

Location Activity settings

This is the area where you define who will be looking after a specific activity at the location along with their contact information. From the **Locations and Activities** page press the **Setting** button to access the page for that particular activity. Note the page can be accessed more efficiently in the future by pressing **Locations & Activities** on the **Main Menu** and then the **Gear wheel** associated with the location and activity you are configuring **or** by pressing **Activity Configuration** on the **Main Menu** and then **Address and Settings**

The first three sections of the page are self-explanatory.

The four buttons in the final miscellaneous section are used to control the following functions.

Create orders enables you to stop the system from automatically creating invoices, this is typically used to turn orders off when the system is being used for school swimming and invoices are not required. It is a good idea to set this slider to the **off** position, whilst you are configuring your system. Make a note to remind yourself to set this to 'on' before booking commences.

The section **Allow instructors to record move and stay information** determines whether staff members can mark if a student should be moving to a different class type, in most cases this is left on.

The button **Show Instructors Comments** determines whether progress information will be put onto progress reports, we recommend that this is left set to off initially.

If **Issue Linked Awards via Lesson Manager** is set to '**On**', and Lesson Manager is being used at the poolside, each time a student passes a task which has an associated award (5 metres, 10 metres, etc). The student will be issued the award. We recommend this item is set to **on**

Don't forget to press **Save** after configuring your system!

Personnel

The personnel section is the area where you add your Administrators, Instructors, and Receptionists. As the system is used by both swim schools and mainstream schools, we refer to Swimming Teachers as Instructors.

To access the page press **System Configuration** on the **Primary menu** then **Personnel** on the **Secondary Menu**.

There are three elements to setting up a Team Member, them being:

- Basic information
- Role
- Access Permissions

Basic Information

By pressing the green add **New Person** on the page, you can add a new team member. Just remember usernames must be unique, this means if the username is being used by a user in a different organisation you won't be able to use it.

Roles

SwimSoft Personnel must be given one of three roles:

- Admin Access all areas
- Instructor Access to relevant course and client information
- Receptionist Allowed to add and manage clients

We recommend that the main administrator should set up three dummy accounts, one of each role type. This means they can then log in and use the system in different modes it will enable them to see what a team member will see if they are allocated a role.

Access Permissions

The access permission setting defines which locations and activities the team member should have access to, if a team member says that can't see data this should be the first area to check.

Membership Types

The Membership types screen is where you define your membership types. A client's membership is just one of several components used in a price matrix to structure your pricing.

To access the page to define a membership type press **System Configuration** on the **Primary menu** then **Membership Types** on the **Secondary Menu**.

Take a good look at the example Price Matrix below and you will see that you can charge clients based on their membership type (Shown in blue below), lesson duration, and lesson type (called the differentiator).

Price List Name		Fees		
Differentiator	Duration (Mins)	Standard	Staff	NHS
Group Lessons	30	£7.50	£3.75	£6.75
1 2 1	30	£20.00	£10.00	£18.00
2 2 1	30	£10.00	£5.00	£9.00
4 Max	30	£8.00	£4.00	£7.20
Group Lessons	45	£10.00	£5.00	£9.00

On the **Memberships** page, you simply need to define your Membership types. For example, you may want to charge staff or NHS Staff reduced pricing for lessons.

You will also see Differentiators in the above table, this is an element we will discuss later and configure later, it will be used to fine tune the fees to be charged.