Swim Continuous

What is Swim Continuous?

Swim Continuous is a mode of operation where the Software 'SwimSoft' will take all your existing courses in a defined Location and Activity and extend them by one month automatically, during the process the system will…

- Create next month's lessons.
- Work out which lessons to exclude.
- Add students to lessons.
- Create invoices, (Including credits)
- Create communication (emails)

With the basics covered let's get into the detail.

Locations and Activities

SwimSoft's Continuous system is Location - Activity specific, meaning that if you run activities at several venues you can choose to run some Continuously and some Termly. For example, if you ran swimming at three sites: Worcester, Andover, and Canterbury you could do the following…

- Worcester – Swimming = Termly
- Andover – Swimming = Continuously
- Canterbury – Swimming = Termly

The journey ahead

If you are looking to use the system, there are seven processes that need to be performed to commission it. Use the list below as a To Do list

1. Prepare to start.
2. Pricing needs to be turned on.
3. Pricing needs to be defined.
4. Check credits are correct
5. Communication needs defining.
6. The Continuous system needs to be activated.
7. Teaching days need to be defined.

Preparing to start

SwimSoft's continuous system works by looking at the courses and lessons running in the current month and then working out next month's lessons.

If you plan to run continuously but you are currently running termly, your last block/term of lessons needs to end on the last day of a month.

If you are setting up an activity at a new location, you need to create an initial block of lessons which ends on the last day of a month.

Once the work above has been completed you can proceed to the next step.

Turning on Pricing

Pricing in SwimSoft is controlled in two places, both need to be reviewed.

1. In the Location Activity settings.
2. On the Membership Type page.

To turn on (or off) billing for a given Location & Activity...

- Go to the **Main Menu**
- Select the appropriate **Location & Activity**
- Press **Activity Configuration** from the **Primary Menu**
- Now press **Address and Settings**
- Proceed to the section **Miscellaneous Settings**
- Ensure the setting **Create Orders** is ***On***
- Proceed to the bottom of the page and press **Save.**

Note: If this setting is off no orders will be created.

The **Membership** page is used to define if a specific type of member is to be billed, in most cases we would expect Membership Types to have their order setting set to yes, meaning create orders. That said, if you provide free lessons to your staff's children you should create a membership type called Staff and set the create orders setting to off.

Note: If a Membership Type's Create Orders setting is set to No, no orders will be created.

Setting Prices

- Go to the **Main Menu**
- Select the appropriate **Location & Activity**
- Press **Activity Configuration** from the **Primary Menu**
- Now press **Price Matrix**
- Define your prices (you do not have to enter a £ or $ sign)
- Press **Store**

Checking Credits

Credits will be added to invoices, so it is important they are correct, credits are checked as follows, from the **Main Menu** press **Financials** and **Unused Credits**, delete or amend credits as necessary.

Communication

As SwimSoft allocates students' additional lessons the software will create communication, the template used will depend on how fees are to be collected, and if the client has a MOR Money account. Below is a list of templates and when they will be used…

- An **Invoice DD SO** – for client's paying by Direct Debit
- An **Invoice Stay** – For client's not paying by Direct Debit
- An **Invoice Account** – for clients with a MOR Money account.
- An **Invoice Account DD** - for clients paying by direct debit who have a MOR Money account.
- A **Booking Letter** – If no invoice is being created.

Email Communication templates are created and managed by…

- Going to the **Main Menu**
- Selecting the appropriate **Location & Activity**
- Pressing **Activity Communication** from the **Primary Menu**

With the above complete it is now time to activate the continuous lesson creation system. This is done by…

- Going to the **Main Menu**
- Selecting the appropriate **Location & Activity**
- Pressing **Activity Configuration** from the **Primary Menu**
- Selecting **Address and Settings**
- Proceeding to the bottom of the page to the section **Marked Continuous Settings**
- Toggle the **Termly** Option to ***Off***
- Toggle the **Monthly** Option to ***On***
- Define the **Process Day.** The process day is the day a of the month you want the next month's lessons built.
- Define The **Preferred Payment Date** this is the date Direct Debits will be collected, or payment should have been made by.
- Once these have been Set press **Save**

Important: It is now time to define the dates when lessons will not be running, this should be completed as soon as possible.

Configuring days

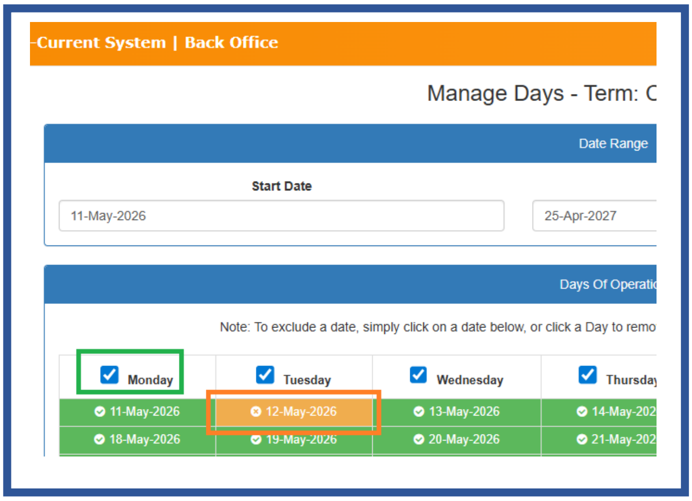
- Go to the **Main Menu**
- Select the appropriate **Location & Activity**
- Press **Activity Configuration** from the **Primary Menu**
- Press **Days** on the Secondary Menu
- If you deliver lessons on a day, make sure the day is active (See Image below)
- If you are not delivering Lessons on a given day it needs to be excluded. (See Image below)

Image One

If you teach on a Monday, ensure Monday is 'activated' as shown by the tick in the green box in the image below.

If you are not teaching on a given day, click on it to exclude it, in the example below the user has clicked on the 12th of May to exclude it.

Note: All changes are saved automatically.



MOR Information

Process & Collection Days

The **Process Day** and **Collection Day** will directly affect two key aspects of your system so they should be chosen with care. The key points are clients joining any activity will be expected to pay for all created lessons and most administrators want to be given notice if a client plans to leave, to enable them to fill the lessons that are being freed up if a client leaves or fails to pay.

We recommend the process day is set to the 14th of the month and the collection date the 23rd.

The Process Day set to the 14th will mean the maximum a client will be asked to pay when joining the program will be a figure equivalent to 6 lessons and the minimum 2, making the initial payment as affordable as possible.

Making the collection day the 23rd means that if a client fails to pay for next month's lessons the administration team have around 7 days to fill the place, thus ensuring maximum occupancy can be achieved.

SOP

When it comes to managing the system, the administrative team has six jobs to perform, you should set a reminder in your calendar a few days before the **Process day** to

1. Check your Pricing (**Activity Configuration** – **Price Matrix**)
2. Check credits are correct (**Activity Configuration** – **Unused Credits**)
3. Adjust communication if necessary. (**Activity Configuration** – **Activity communication**)
4. Review teaching days. (**Activity Configuration** – **Days**)

After the **Process Day**

5. Send communication. (**Client Communication** – **Manage Communication**)
6. Release Direct Debit payment requests (**DDM Management** – **Review and Release**)

Restructuring & Pausing

One simple change will switch a system back to 'Classic' (termly/block) SwimSoft, this allows the program to be completely re structured or paused to be restarted at a later date, it's great for...

- Dealing with pauses in the program when there is going to be a significant break, I.E equipment failure.
- Restructuring in the summer if lots of children are off to school and there's a lot of juggling to do.
- If the program has to change because of a change in staffing or pool (time) availability.

Cancelling Courses

If a course does not need to be extended select **Courses** from the **Main Menu** and then choose the **Search** option, next **deselect** the **repeating** option and press **Update Course**.

Leavers

If a student is leaving and you do not want them to be allocated to any more lessons, go to their **CDS** press **History** and set the **Result** to ***Leaving*** and then press **Store.**

If you need to remove a student from lessons that they have been allocated, go to their **CDS** press **Lessons** and select the lesson(s) you want to remove them from.

Very important note

Rolling and extending courses cannot be reversed. So, it is very important that all data is correct, the process can be paused by switching to termly mode. This is done by...

- Going to the **Main Menu**
- Selecting the appropriate **Location & Activity**
- Pressing **Activity Configuration** from the **Primary Menu**
- Selecting **Address and Settings**
- Proceeding to the bottom of the page to the section **Marked Continuous Settings**
- Toggle the **Monthly** Option to ***Off***
- Toggle the **Termly** Option to ***On***
- Once these have been set press **Save**