Adding an additional activity

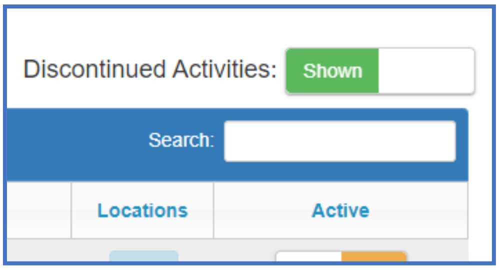
Assumption

This document assumes that you have a good working document knowledge of SwimSoft. It is designed as a checklist so that you configure all the necessary elements of the system, this, in turn, will enable courses to be configured for a new activity. The elements involved in this are as follows,

- Creating the activity
- Defining location activity settings
- Authorising personnel
- Creating communication
- Defining the first terms
- Creating courses
- Activating direct debit

Creating the activity

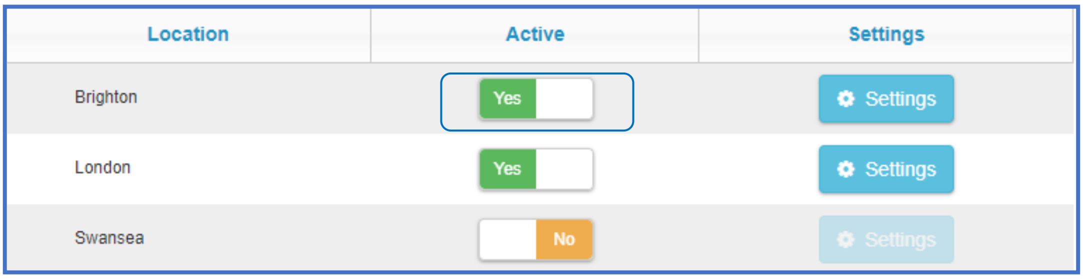
Activities are created by pressing **System Configuration** then **Manage Activities,** once the page is open make sure the Activity has not been added previously and subsequently made inactive, to do this toggle the slider found in the top right of the page to the ***Shown*** position.



Next check that the activity does not exist in the table.

Assuming the activity has not been added, press the **New Activity** button and enter the activities name then press **Create**.

Once the activity is created, you will need to define the locations where the activity will take place**.** Do this by pressing the blue **Locations** button for the activity and toggle the desired locations to '***Yes***.'



Once the location has been activated, the **settings** button will turn blue, and you will now be able to press this to define the location activity settings.

Defining location activity settings

The **Location Activity Settings** page allows you to define who will be managing it. The settings are made by either pressing the **Settings button** on the page or the **Location and Activities** button on SwimSoft's Main Menu and then pressing the appropriate **gearwheel** to access the settings page. Work from the top of the page to the bottom completing all elements before pressing **Save** to store your work.

Defining the first term

On the **Main Menu** make sure you have selected the new location activity then press the **Terms** button in the left-hand column. Once the **Terms** page is open, press the **Manage** button found at the bottom of the page, this will open the **Manage Terms** page. Press the **Create Term** button found on the bottom right-hand side of the page and then complete the form that opens, press the **Create** button to save your work, and return to the **Manage Terms** page. Next press the **Days** button to define which day is the week courses will be running and exclude any days when they will not be taking place, press **Store** to save your work, and **Exit** to return to the **Managed Terms** page. To complete the last part of the process, which is to define the price matrix, press the **Pricing** button. Once you have completed the matrix press **Store** then **Exit** and press **Back to term Selector**. Press your newly created term and the system will take you back to the main menu.

Creating courses

Courses are created by pressing **Courses** on the **Main Menu** and then **Create a course,** you will be required to construct all the drop-down lists as you build your first course. Once this is done, creating subsequent courses will be quick and easy.

Alternatively, to avoid having to use the **Add/Edit** option on the drop-down in **Create a Course**, you can configure all the activity settings before this, so they are already in the drop-down ready to be selected. This is done by going to **Activity Configuration** on the **Main Menu** and working down the secondary menu.

Defining and authorising personnel

By default, your team members will not have access to the new activity unless you have explicitly given it to them. The quickest and easiest way to do this is to press **Activity Configuration** on the **Main Menu** then select **Activity Personnel**, simply select the team members that will need access.

Creating communication

One of the easiest ways to create communication is to copy it from an existing location and activity. This is done by choosing an existing **Location and Activity** on the main menu, pressing **Client Communication,** and then **Activity Communication.** Next select the appropriate **Manage** button to open the existing template, place your cursor into the body of the email, and press ***CTRL+A*** (on your PC keyboard) to select all the text then press ***CTRL+C*** to copy that text. Make a note of the email's subject line so that you can reproduce this later. Once you have copied the body of the email, make a note of the subject line, and return to the main menu. Select the new **Location and Activity** then press **Client Communication** and **Activity Communication** again. Press the **Create Communication** button and select the ***Communication Type*** you want, finishing the creation process by pressing the **Create** button. You will now be able to press the button marked **Manage**, to create the communications template, place your cursor in the body of the email, and press ***CTRL+V*** to paste in the content you copied earlier and complete the process by adding in the **subject line** and the ***from email address***. Once all these elements have been pasted in, created, and where necessary modified, press the **Save** button to store away your work.

Activating direct debit collections

If you plan to collect your fees by direct debit you will need to create a link between SwimSoft and GoCardless, this can be completed in a few seconds by pressing **DDM Management** and **DDM Set Up**. Once you have entered the direct debit management page, press the **location/activities button, activate** the location and activity, and then finally press the **okay** button to complete not only the direct debit setup but the configuration of the new activity.