

Adding an additional location

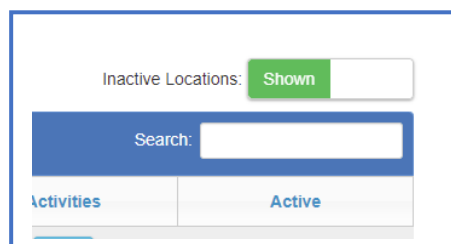
Overview

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 and run at a new location. The steps that need to be performed are...

- Creating the location
- Creating areas
- Creating sections
- Activating activities
- Defining location activity setting
- Authorising personnel
- Creating communication
- Defining the first terms
- Creating courses
- Activating direct debit

Creating a new location

Locations are created by pressing **System Configuration** then **Manage Locations** once the page is open make sure the Location 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 location does not exist in the table.

Assuming the location has not been added, press the **Add Location** button and enter the locations name and address. As soon as you have entered the locations name, the **Location Abbreviation** will be created automatically. This abbreviation will be used throughout the system where it is not possible to put the full location name. You can change it to suite your needs, remember all abbreviations need to be unique!

Once the location is created you will be prompted to define the locations **Areas**. Areas being the pools or rooms used, for example:

- Main pool
- Teaching pool
- Studio 1

Areas can be accessed and edited at any time by pressing the **Areas** button on the **Manage Location** page.

Sections

Pools are often divided into sections, use the **Sections** button found on the **Areas page** to define them, if you are using a small pool which does not get subdivided just add one section called 'whole pool'. Typically you will add sections such as...

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

Activating activities

Not all activities run at all locations, for example crash courses might not be run at one school pool as it is closed during the holiday, whilst another location might be open. The activities section allows you to define which activities are run at any given location. Pressing the **Activities** button on the **Location page** allows you to specify what activities you will be running at a location. If you can't see what you need, press the **Manage activities** button and either create one or if you have run the activity previously, re-activate it.

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** on 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. If you require assistance with this page, press the **Help** button on the top left-hand side.

Defining and authorising personnel

By default your team members will not have access to the new location and 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, made a note of the subject line and returned 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 of these elements have been pasted in, created and where necessary modified, press the **Save** button to store away your work.

Defining the first term

On the main menu make sure you are on 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 too define the price matrix, press the **Pricing** button. Once you've completed the matrix press **Store** then **Exit** and press **Back to term Seletor**. 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.

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** and **activate** the location and activity and then finally pressing the okay button to complete not only the direct debit setup but the configuration of the new location.