

## Waiting List

### Overview

This guide will show you how to navigate around the waiting list. From the waiting list, you can allocate a student a place, email or text clients to confirm they still require a place on the waiting list. You can also re-position a student's place if you need to re-order your waiting list.

### Waiting List

To view the waiting list press **Students** and **Waiting List**, you will be presented with the **Waiting List Summary**, from here **select** the waiting list you would like to view. The **Waiting List Summary** will show you how many students are on the waiting and how many places are available.

### Waiting List Summary

Show  entries
Search:

| Select | Class            | Number of Students Waiting | Places Available | Activity                | Location |
|--------|------------------|----------------------------|------------------|-------------------------|----------|
| Select | Beginners        | 3                          | 50               | Swimming Original       | Brighton |
| Select | Intermediate     | 1                          | 2                | Swimming Original       | Brighton |
| Select | Tai Chi          | 1                          |                  | Continuous Fixed Top Up | Brighton |
| Select | Body Balance     | 0                          |                  | Continuous Fixed Top Up | Brighton |
| Select | Advanced         | 0                          | 6                | Swimming Original       | Brighton |
| Select | Parent and Baby  | 0                          | 4                | Swimming Original       | Brighton |
| Select | Waiting List     | 0                          |                  | Swimming Original       | Brighton |
| Select | Summer Intensive | 0                          |                  | Swimming Original       | Brighton |
| Select | Waiting List     | 2                          |                  | Swimming Original       | Brighton |
| Select | Waiting List 2   | 1                          |                  | Swimming Original       | Brighton |

Showing 1 to 10 of 10 entries
Previous **1** Next

Copy
CSV
Excel
PDF
Print

← Exit

Click on **select** to view waiting list. If the select button is grey then the waiting list is empty

The waiting list has the following functions:

- Add student notes
- Allocate students to the course
- Reposition a students place on the waiting list
- Takes you to the students CDS
- Amend Registration date
- View waiting list notes
- Email or text clients
- Export data

Once you have selected the waiting list the following screen will appear.

### Adding a Student Note

The screenshot shows the 'Student Waiting List - Beginners' interface. At the top, there is a search bar and a 'Show 100 entries' dropdown. Below this is a table with columns: Pos, CDS, Allocate, First Name, Surname, DOB, Age, 1st Line Address, Registered, and Note. Three student entries are visible:

| Pos | CDS        | Allocate        | First Name | Surname   | DOB         | Age          | 1st Line Address   | Registered              | Note        |
|-----|------------|-----------------|------------|-----------|-------------|--------------|--------------------|-------------------------|-------------|
| 1   | [CDS icon] | [Allocate icon] | Finn       | Shark     | 04-Sep-2011 | 10yrs 6m 3d  | 12 Watermill Close | 24-Jun-2019<br>15:50:00 | [Note icon] |
| 2   | [CDS icon] | [Allocate icon] | Sasha      | Batchelor | 12-Jul-2011 | 10yrs 7m 23d | NA                 | 01-Apr-2021<br>00:00:00 | [Note icon] |
| 3   | [CDS icon] | [Allocate icon] | Aaron      | Hills     | 01-Jan-2015 | 7yrs 2m 6d   | Red Rice           | 06-Apr-2021<br>00:00:00 | [Note icon] |

Below the table, there are navigation buttons: 'Previous', '1', and 'Next'. At the bottom, there are export options: 'Copy', 'CSV', 'Excel', 'PDF', and 'Print'. Action buttons include 'Move client from position [ ] To Position [ ]', 'Move', 'Reorder Clients by Registration Date', 'Reorder', 'Group Actions', and 'Exit'.

Two callouts are present:

- A callout on the left points to the 'Note' column header and says: "Press here to view history of students waiting list notes".
- A callout on the right points to the 'Note' icon in the third row and says: "Press here to add a new note".

### Allocating a student a place

Please note if you allocate a student a place and have not actioned this through the waiting list, you have to remember to delete the student from the waiting list. This is actioned through the **CDS**, press **Waiting List** and **Delete**. When allocating a student a place through the waiting list, SwimSoft will also remove the student from the waiting list.

To allocate a place, press the **Allocate** button to add the student to a course and the course selection page will appear. Press the **Students** button next to the course you require, ensure the **lessons are selected** and press **Confirmed** and you will be returned to the **Waiting List**.

### Communicating through the Waiting List

The waiting list gives you the ability to email or text everyone on the list. To do this, press the **Group Actions** and then either select **Send Email** or **Send SMS**. A list of students will appear, to confirm who will be communicated to, press **Create Email/SMS**. Once you have written your email or text press **Send Email** or **Send Email – One per Family** (only if you have not used any variables).

### Reposition Students Place

The screenshot displays a table with the following columns: Pos, CDS, Allocate, First Name, Surname, DOB, Age, 1st Line Address, and Note. The table contains three entries:

| Pos | CDS    | Allocate | First Name | Surname   | DOB         | Age          | 1st Line Address | Note                    |
|-----|--------|----------|------------|-----------|-------------|--------------|------------------|-------------------------|
| 1   | [Icon] | [Icon]   | Aaron      | Hills     | 01-Jan-2015 | 7yrs 2m 8d   | Red Rice         | 06-Apr-2021<br>00:00:00 |
| 2   | [Icon] | [Icon]   | Sasha      | Batchelor | 12-Jul-2011 | 10yrs 7m 25d | NA               | 09-Mar-2022<br>00:00:00 |
|     | [Icon] | [Icon]   | Edward     | Hill      |             | unknown      | NA               | 09-Mar-2022<br>00:00:00 |

Below the table are controls for repositioning:

- Move client from position** [input] **To Position** [input] **Move** button
- Reorder Clients by Registration Date** **Reorder** button
- Group Actions** button
- Exit** button

Callout 1 (top right): Change registration date by clicking on the date. A calendar will appear and you will be able select the new date.

Callout 2 (left): To move the students position you can left click on your mouse on the position number and drag and drop the student to where they should be positioned.

Callout 3 (bottom right): Enter the students current position and the position you would like to move them to and press **Move**. The **reorder** button will reposition the students place back to the original order.