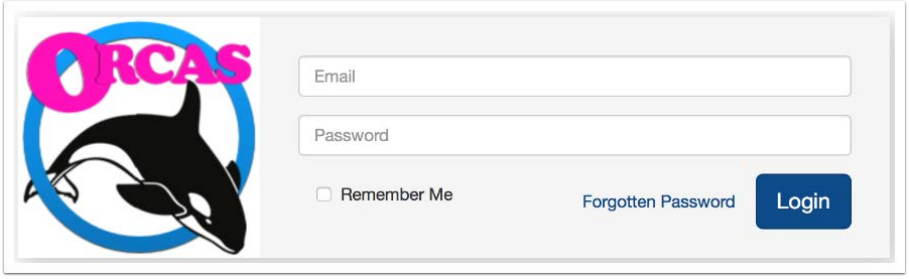
Your swimming club has signed up for Swim Manager which is an easy to use system for managing a UK swimming club. The system makes it easy for you as a parent to update your information, check upcoming meets and enter them, pay invoices and check the times of your swimmers.

1. Logging In

When your Club is ready to start using Swim Manager they will send you an email with the web site address for your Club.

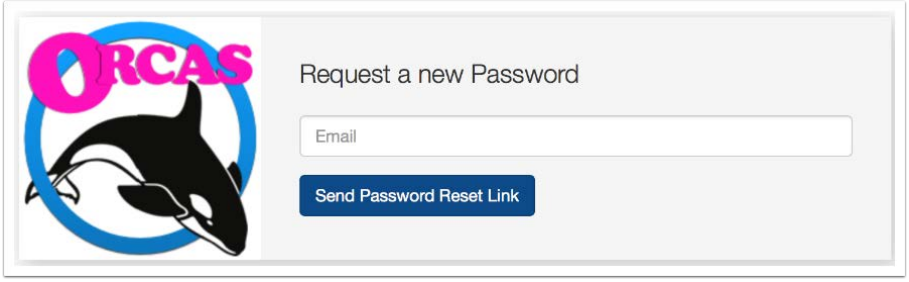
To log in to Swim Manager for the first time follow these steps:

1. Go to the site address provided by your Club
2. Click the Forgotten Password link highlighted below

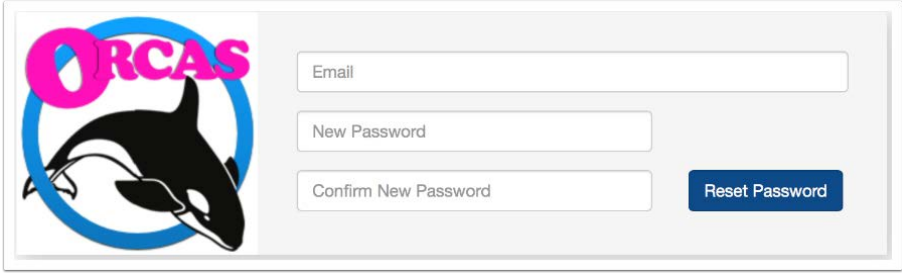


3. Enter your email address into the Email field and click "Send Password Reset Link".

Note that if you have more than one email address, you must use the address that your Club sent your welcome email to since this is the address that they have on record for you.



4. Click the button in the email that is sent to you to choose a new password
5. One the page that you are taken to enter your email address and your selected new password into the New Password and Confirm New Password fields
6. Click Reset Password



You will now be able to log in to your Club's Swim Manager site using the password you selected.

2. Accounts and Members

In Swim Manager each family has an Account. Within the Account there are Members which hold information about the Parents and Swimmers within the family.

For a family with 2 children who are both swimmers and 2 parents, you will have 4 Members within the Account. The information held for each of the 4 Members will be different: for the parents the system will store contact information; for the children the system will store ASA membership details, squad details and so on.

If the parents are also ASA members (for example if they volunteer or are qualified officials) then the Club will also store the ASA Numbers for the parents in the system.

Each person, whether they are a parent or a swimmer, may be represented within the Account as a Member.

3. Account Dashboard

The main page you see when you first log in to the Parent Portal is the Account Dashboard. You can also access this page by clicking on the **Account** menu item on the left (highlighted). This shows your address details as well as your current account balance.

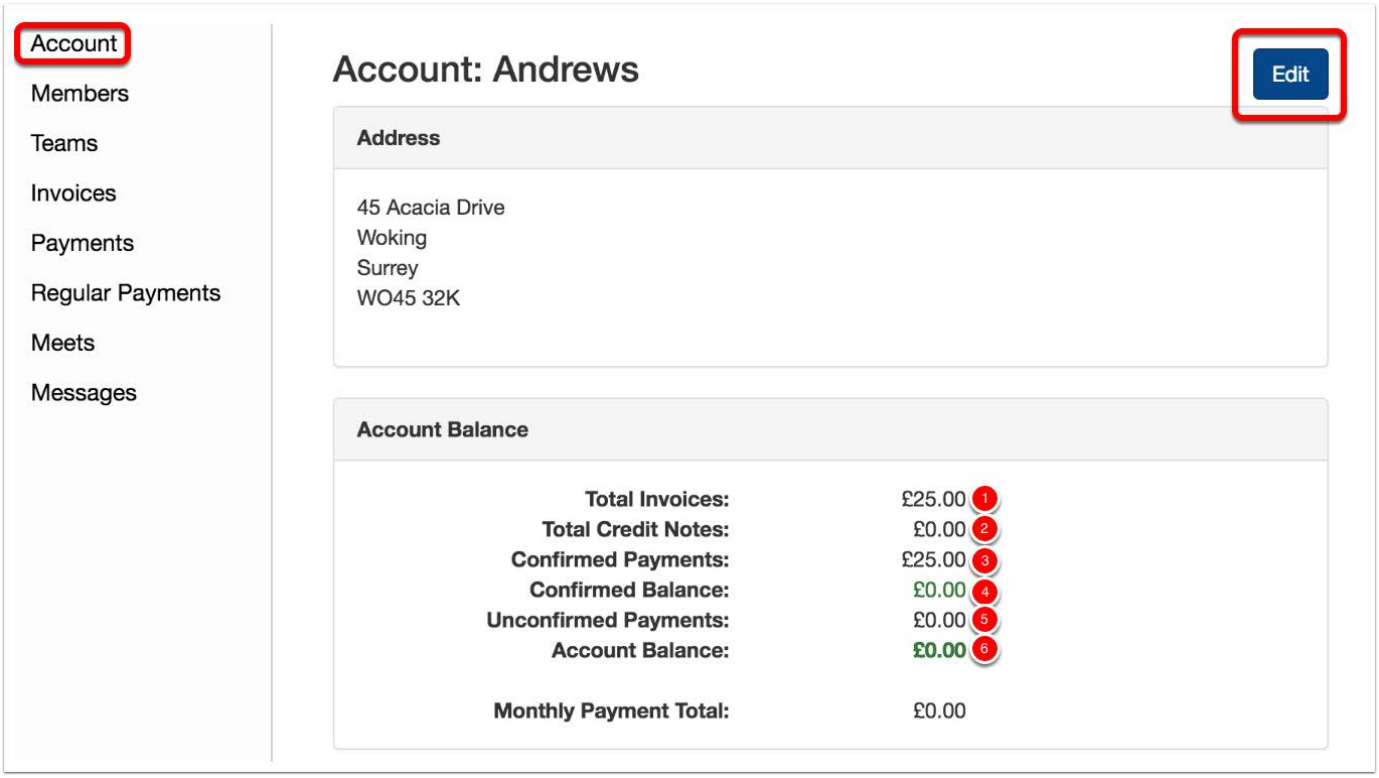
To edit your address, simply click the **Edit** button (highlighted) on the right had side.

The Account Balance details are as follows (numbers correspond to those in the image below):

1. **Total Invoices** is the total value of all your Invoices
2. **Total Credit Notes** is the total value of any Credit Notes (for example for Meet Entry refunds)

3. **Confirmed Payments** is the total value of any Payments you have made that have been confirmed as received by your Club
4. **Confirmed Balance** is the balance after deducting Credit Notes and Confirmed Payments (*Total Invoices - Total Credit Notes - Confirmed Payments*)
5. **Unconfirmed Payments** is the total value of any Payments you have made that have *not* been confirmed as received by your Club
6. **Account Balance** shows the net balance after allowing for Unconfirmed Payments (*Confirmed Balance - Unconfirmed Payments*)

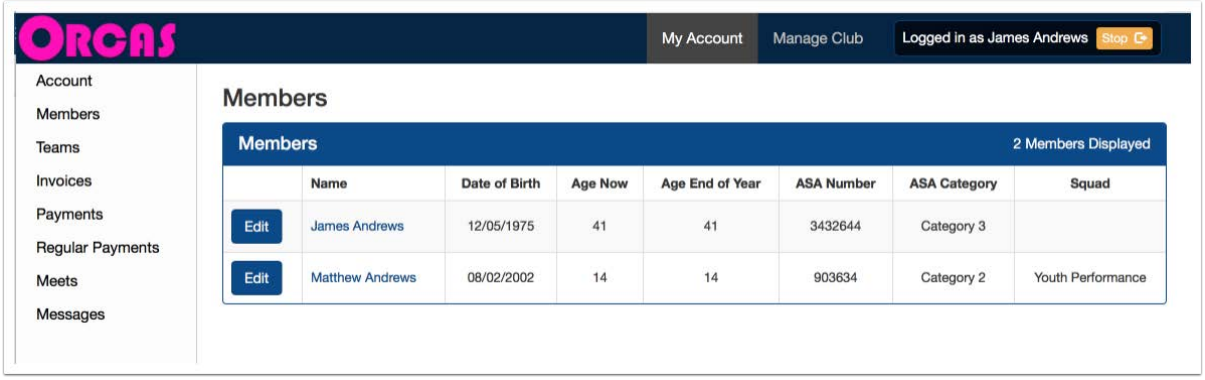
The overall Account Balance is shown in **green if you are in credit** and **red if you are in debit**



4. Viewing a List of Members

Clicking on the Members menu option displays a list of the Members for this Account.

- Clicking the member Name will display full details for that member
- Clicking the Edit button will allow you to edit the details for that member



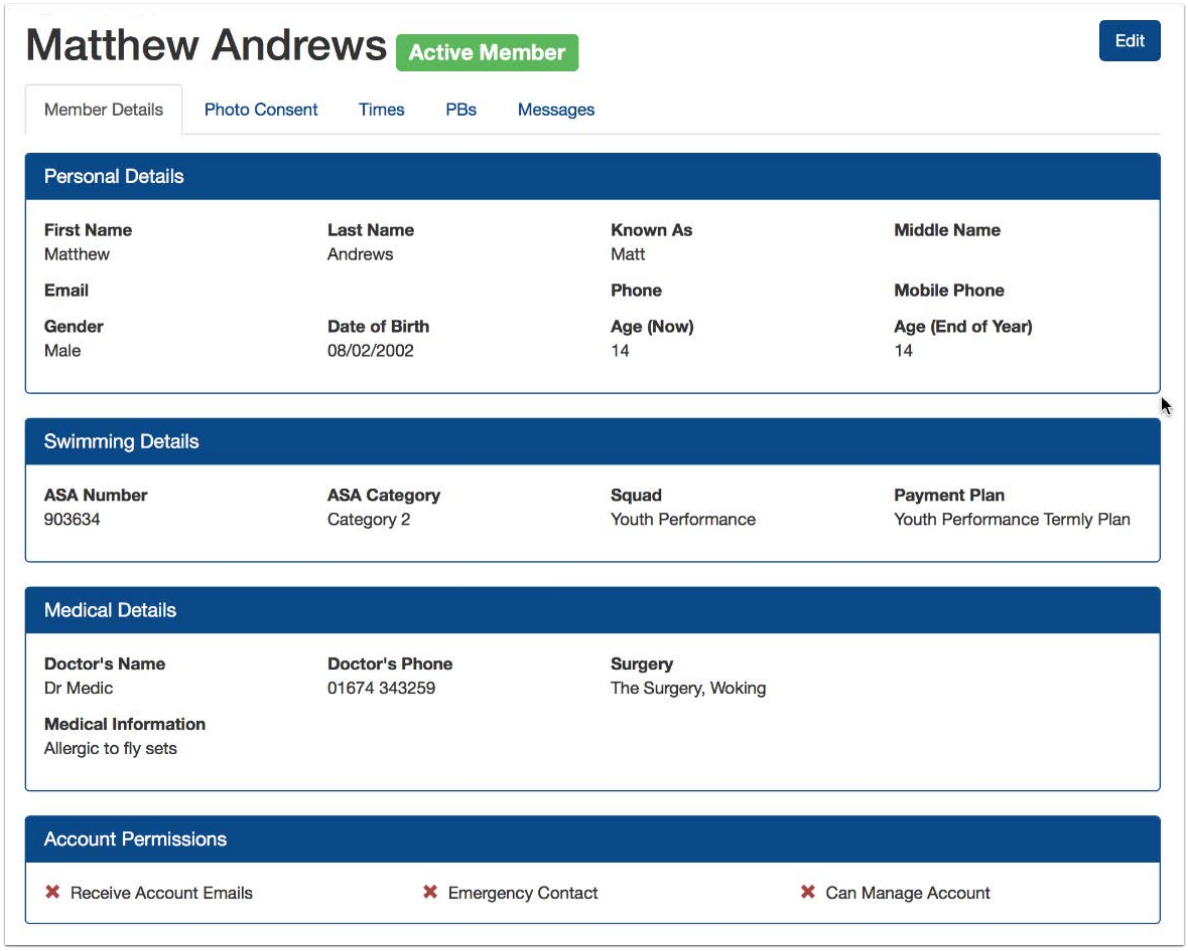
5. Viewing Member Details

The details for a member are displayed across a number of tabs.

5.1 Personal Details

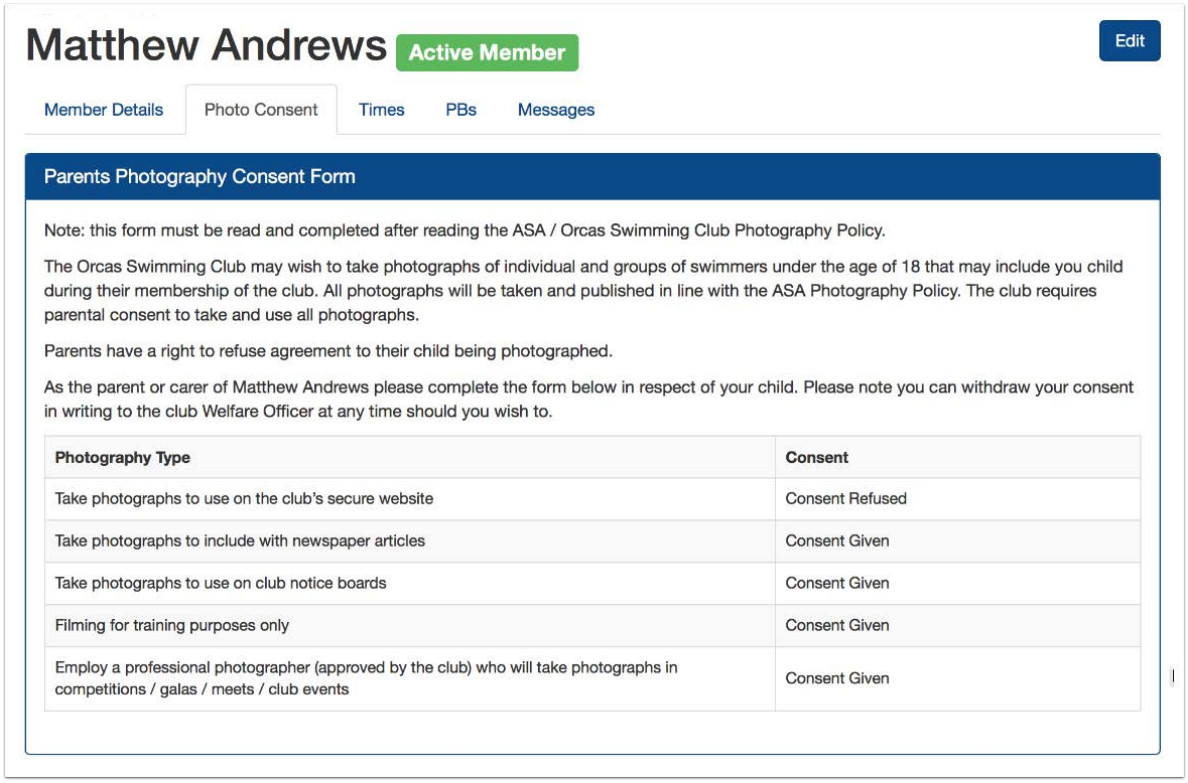
The Member Details tab displays information that is specific to the member such as name, date of birth, ASA membership details and medical details. There are also three checkboxes that indicate the following:

- **Receive Account Emails** indicates whether this member will receive emails sent to this account. An email is "sent to this account" if it is sent to a group of people that includes any member for the account.
- **Emergency Contact** indicates if this member is an emergency contact for the Members on this account
- **Can Manage Account** indicates that this person can log in to the Parent Portal and manage the account



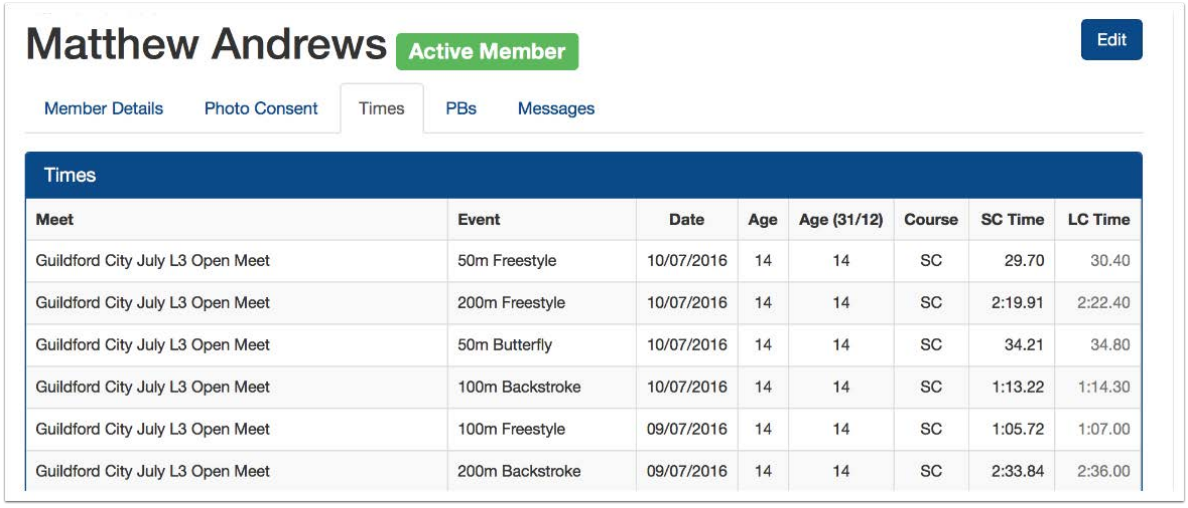
5.2 Photography Consent

The Photography Consent tab allows you to see whether you have currently provided your consent for the Club to take and use photographs in different ways.



5.3 Times

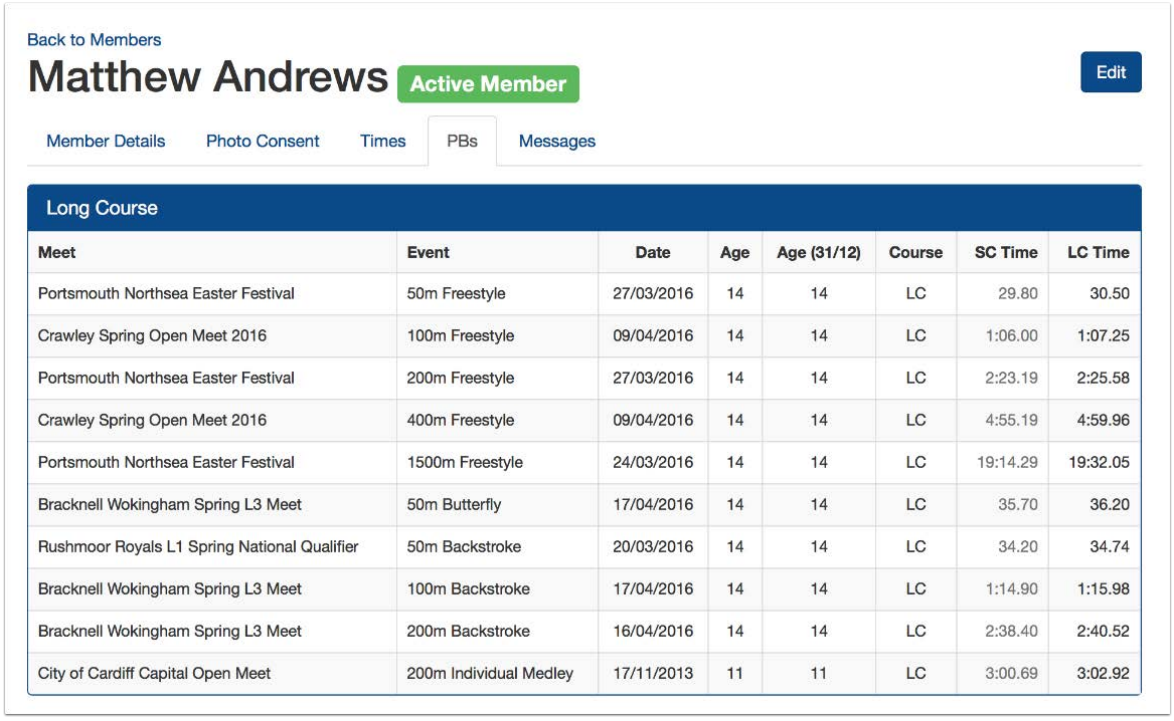
The Times tab displays all of the times for this Member that are in the system in date order. The system also converts between long course (LC, 50m) and short course (SC, 25m) times using ASA conversion methods and displays the converted time in lighter grey text.



Meet	Event	Date	Age	Age (31/12)	Course	SC Time	LC Time
Guildford City July L3 Open Meet	50m Freestyle	10/07/2016	14	14	SC	29.70	30.40
Guildford City July L3 Open Meet	200m Freestyle	10/07/2016	14	14	SC	2:19.91	2:22.40
Guildford City July L3 Open Meet	50m Butterfly	10/07/2016	14	14	SC	34.21	34.80
Guildford City July L3 Open Meet	100m Backstroke	10/07/2016	14	14	SC	1:13.22	1:14.30
Guildford City July L3 Open Meet	100m Freestyle	09/07/2016	14	14	SC	1:05.72	1:07.00
Guildford City July L3 Open Meet	200m Backstroke	09/07/2016	14	14	SC	2:33.84	2:36.00

5.4 PBs

The PBs tab displays all of this members best times for short course and long course. It also provides SC-LC and LC-SC converted times.



Meet	Event	Date	Age	Age (31/12)	Course	SC Time	LC Time
Portsmouth Northsea Easter Festival	50m Freestyle	27/03/2016	14	14	LC	29.80	30.50
Crawley Spring Open Meet 2016	100m Freestyle	09/04/2016	14	14	LC	1:06.00	1:07.25
Portsmouth Northsea Easter Festival	200m Freestyle	27/03/2016	14	14	LC	2:23.19	2:25.58
Crawley Spring Open Meet 2016	400m Freestyle	09/04/2016	14	14	LC	4:55.19	4:59.96
Portsmouth Northsea Easter Festival	1500m Freestyle	24/03/2016	14	14	LC	19:14.29	19:32.05
Bracknell Wokingham Spring L3 Meet	50m Butterfly	17/04/2016	14	14	LC	35.70	36.20
Rushmoor Royals L1 Spring National Qualifier	50m Backstroke	20/03/2016	14	14	LC	34.20	34.74
Bracknell Wokingham Spring L3 Meet	100m Backstroke	17/04/2016	14	14	LC	1:14.90	1:15.98
Bracknell Wokingham Spring L3 Meet	200m Backstroke	16/04/2016	14	14	LC	2:38.40	2:40.52
City of Cardiff Capital Open Meet	200m Individual Medley	17/11/2013	11	11	LC	3:00.69	3:02.92

6. Editing Member Details

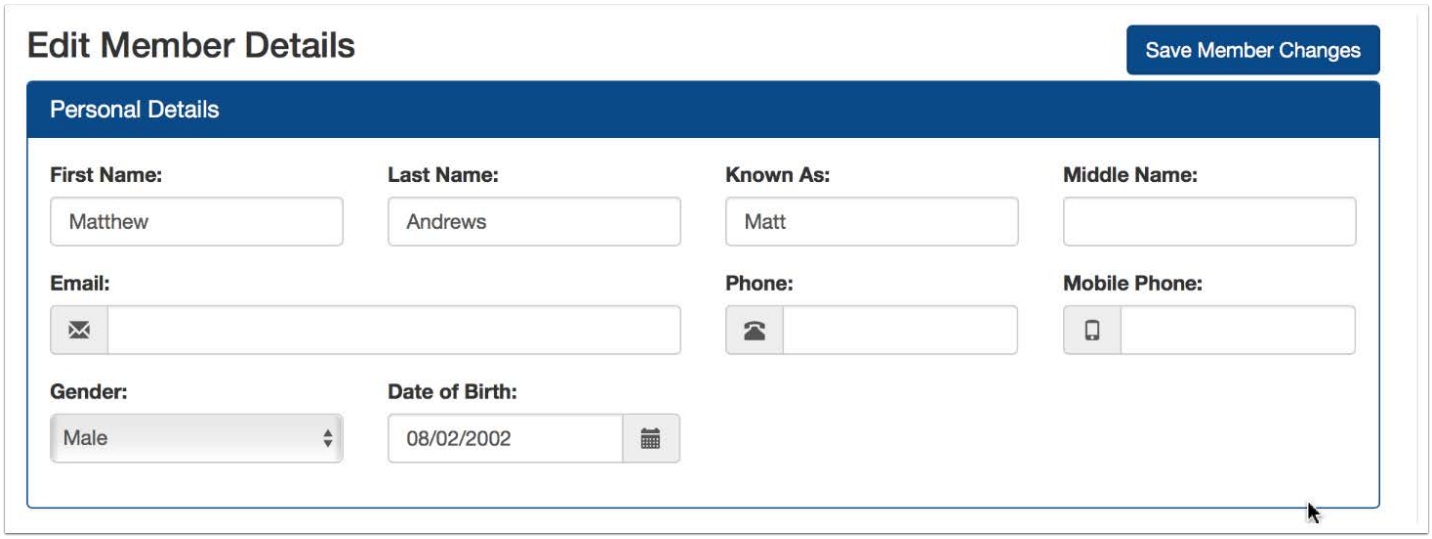
To edit a member's details you can either click the "pencil" edit icon on the Members list or if you are viewing a member's details the "pencil" icon is in the top right hand corner.

To make changes, just update the appropriate fields and click "Save Member Changes"

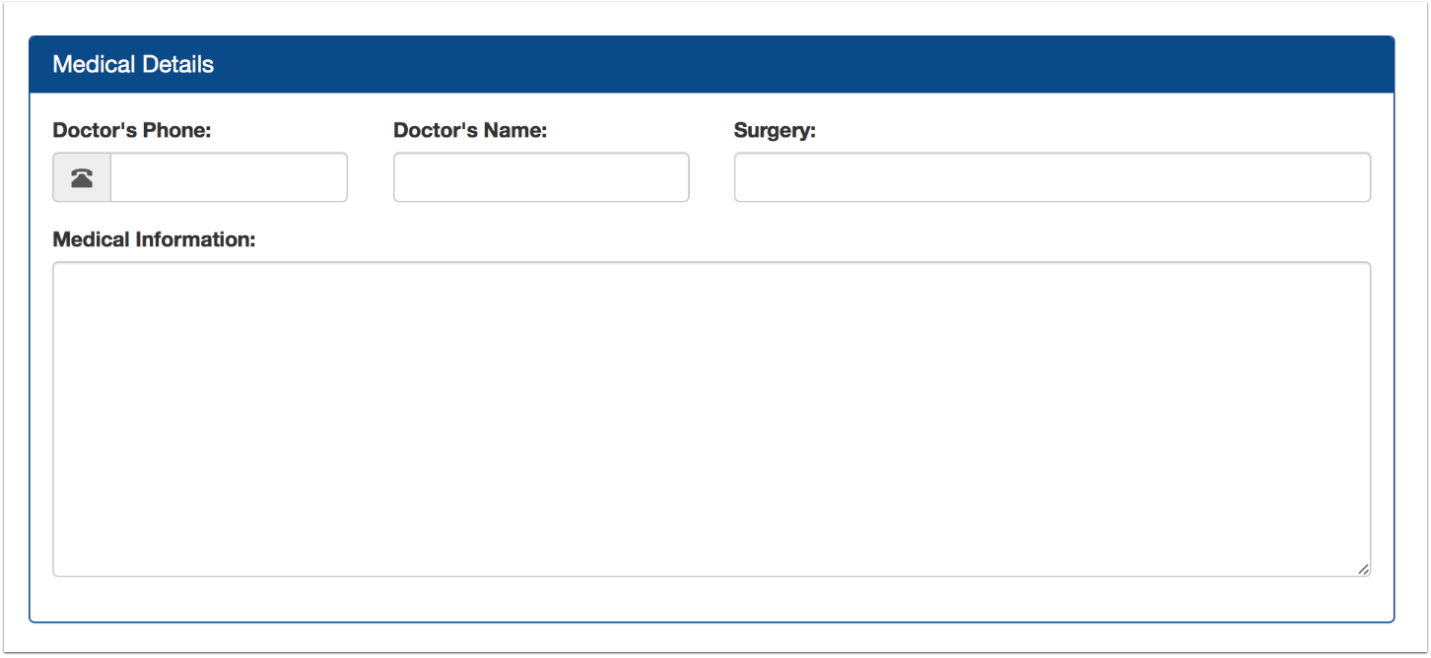
6.1 Personal Details

Note that parents and swimmers may both be added as separate members in Swim Manager with their own contact information.

The details here relate to the person that you are currently editing. For junior members you would normally leave the email, phone and mobile phone fields empty. For parents the email, phone and mobile phone should be populated.

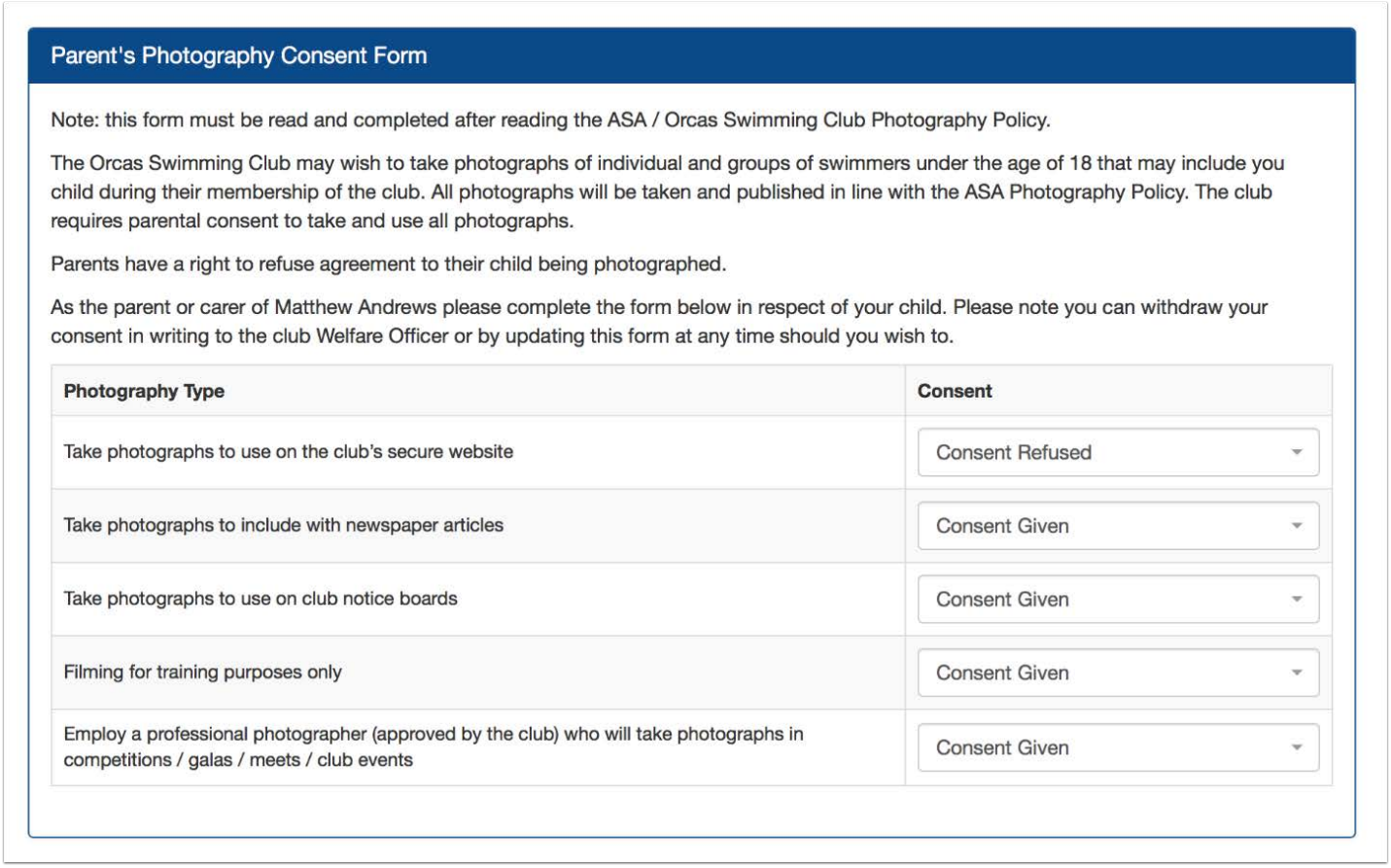


6.2 Editing Medical Details



6.3 Photography Consent

You can update your photography consent preferences at any time. Swim Manager keeps track of changes to the consent information so that it is possible to see whether consent was changed at some point.



Parent's Photography Consent Form

Note: this form must be read and completed after reading the ASA / Orcas Swimming Club Photography Policy.

The Orcas Swimming Club may wish to take photographs of individual and groups of swimmers under the age of 18 that may include you child during their membership of the club. All photographs will be taken and published in line with the ASA Photography Policy. The club requires parental consent to take and use all photographs.

Parents have a right to refuse agreement to their child being photographed.

As the parent or carer of Matthew Andrews please complete the form below in respect of your child. Please note you can withdraw your consent in writing to the club Welfare Officer or by updating this form at any time should you wish to.

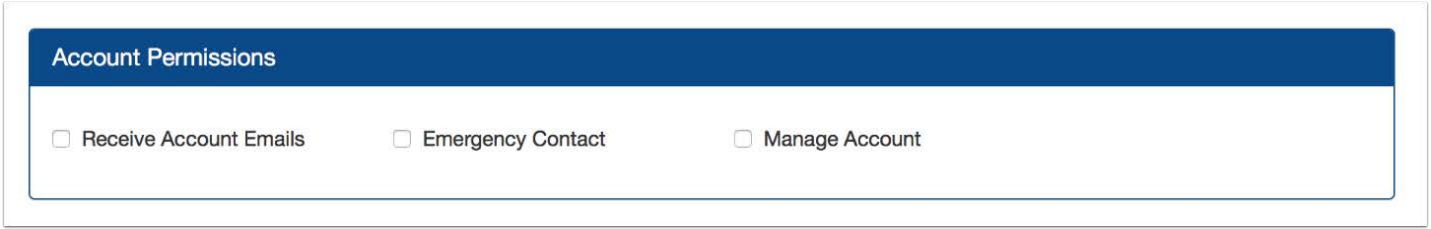
Photography Type	Consent
Take photographs to use on the club's secure website	Consent Refused
Take photographs to include with newspaper articles	Consent Given
Take photographs to use on club notice boards	Consent Given
Filming for training purposes only	Consent Given
Employ a professional photographer (approved by the club) who will take photographs in competitions / galas / meets / club events	Consent Given

6.4 Account Permissions

The Account Permissions operate as follows:

- If Receive Account Emails is checked, this member will receive emails concerning any member on this account.
- If Emergency Contact is checked your Club will know that this person can be contacted in case of emergency
- If Manage Account is checked then this Member can manage the account (they can do anything covered in this guide)

As a general rule, parents or masters swimmers will have all three boxes checked and junior members will have no boxes checked.



7. Teams

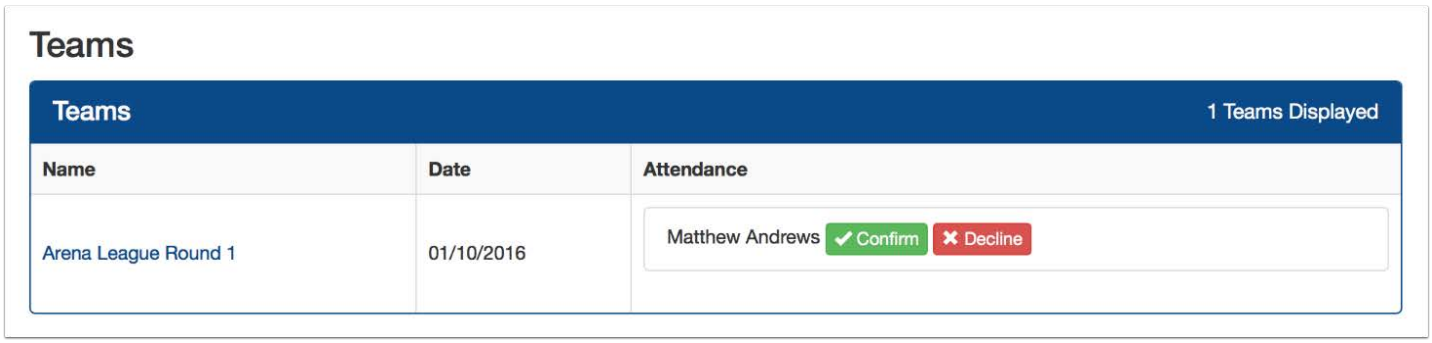
Swim Manager allows you to see the teams that your swimmers have been selected for and to confirm or decline attendance. When a member is selected for a team and the Team is published then it will appear in the Teams section.

7.1 Team List

When you look at the Teams list, you will see a list of Teams that your Members have been selected for. You are able to confirm or decline attendance by clicking on the relevant button next to the Member's name.

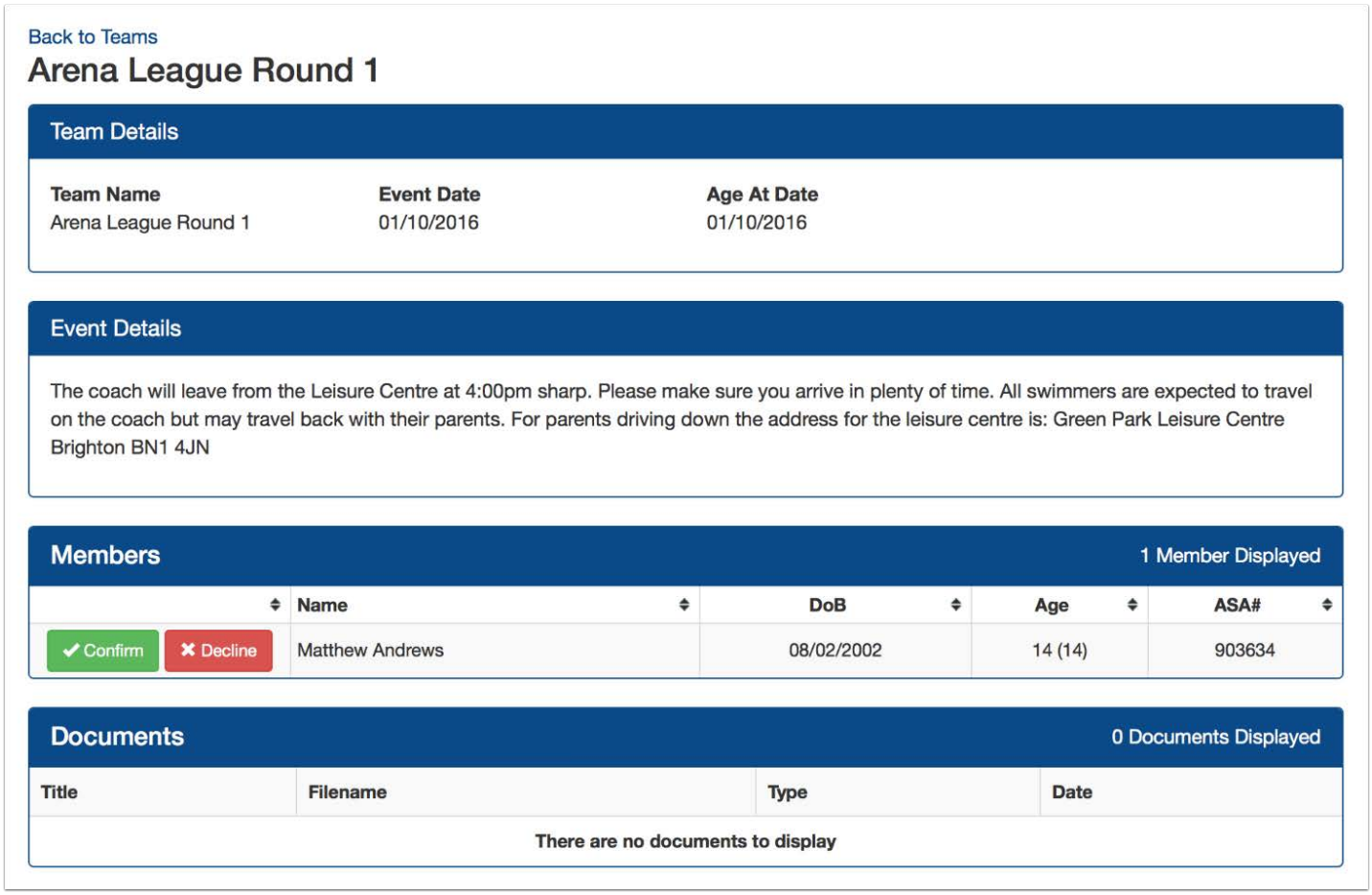
If you want to view more details about the event, click on the Team Name ("Arena League Round 1" in the example below).

Once you have confirmed your attendance you are not able to change this - you should contact your coach or Club directly. This is to avoid a situation where Members decline to attend, having already confirmed - the direct communication means that your coach will be able to make alternative arrangements for another Member to join the Team.



7.2 Team Details

To view any details about the Team event, such as the transport details, click on the Team name and you will see a screen similar to the one below.

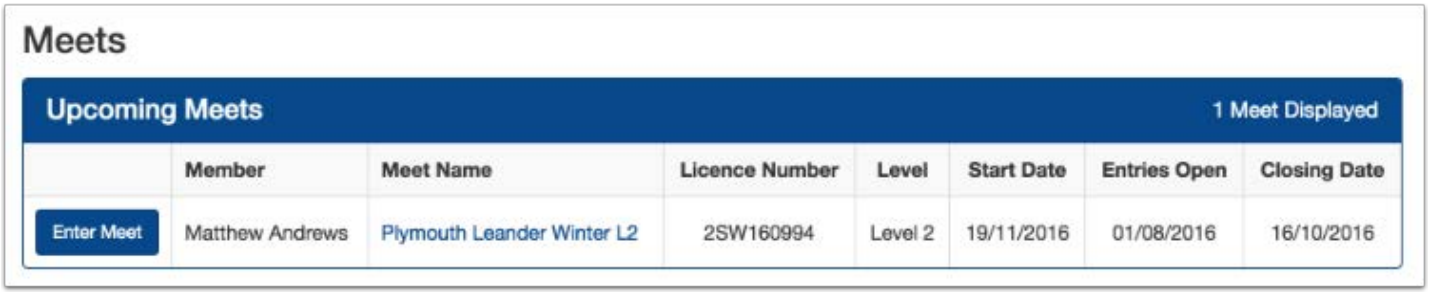


8. Entering Meets

Swim Manager makes it extremely easy for you to enter meets. Simply click the Meets option in the Parent Portal and you will see a list of upcoming meets that you are able to enter. If you do not see a meet here then it is likely to be for one of the following reasons:

1. Your Club has not yet opened entries for the meet
2. The entry deadline has passed for this meet (meets are automatically removed from the list on this date)
3. Your swimmer is not in a Squad that this meet is targeted for

To enter the meet, click the Enter Meet button.



Meet Entry Form

The Meet Entry Form probably looks very similar to paper entry forms that your Club may have used previously. The header section shows details of the meet, the entry deadlines and which squads have been selected for this meet.

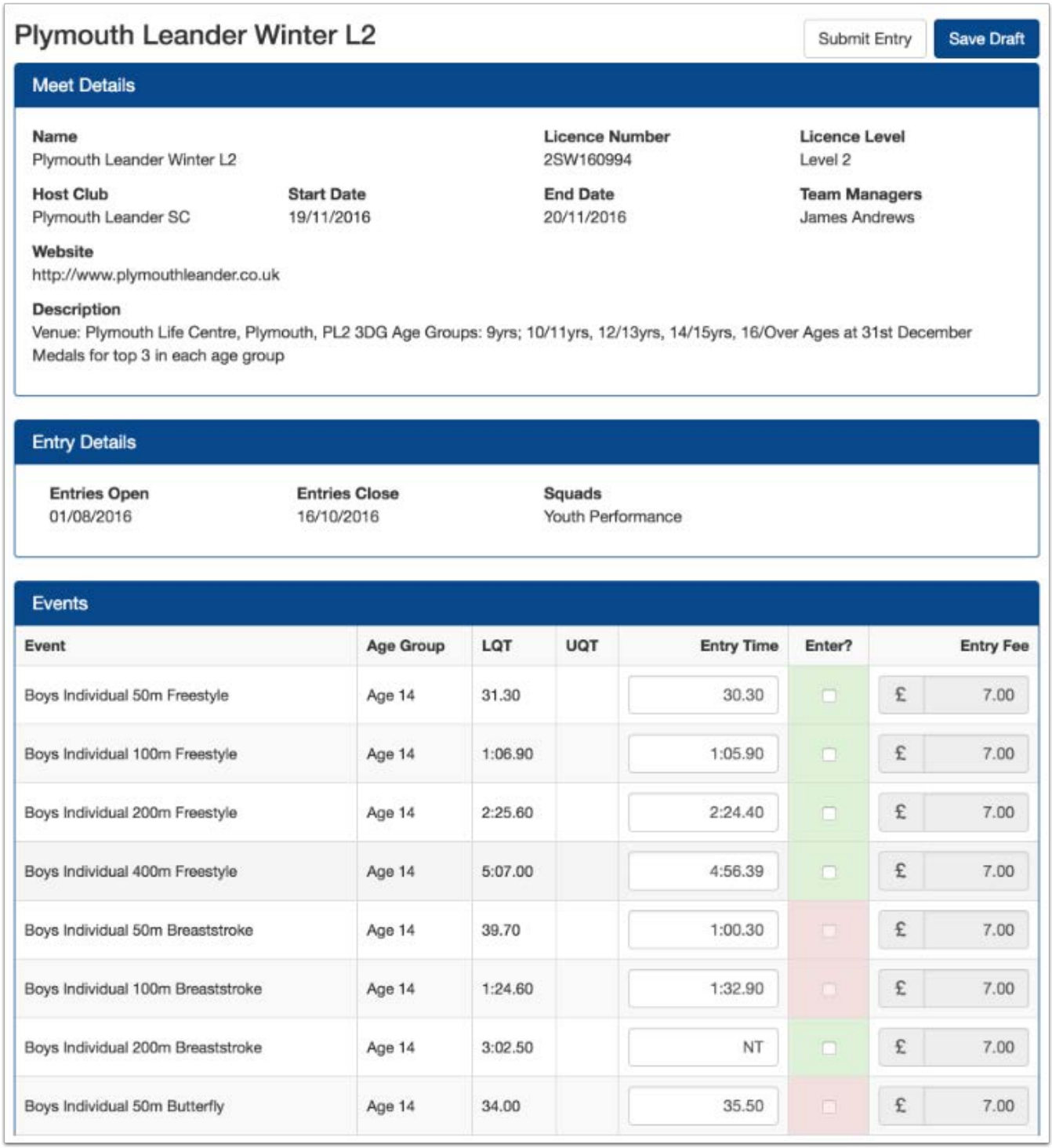
The Events section of the form shows all of the meet events with the Age Group that your swimmer falls in to based on the Age At Date and the defined Age Groups for the meet. The LQT and UQT fields are automatically populated with the lower (no slower than) and upper (no faster than) qualifying times for the relevant age group and your swimmer's entry time is also pre-populated. Swim Manager will automatically take the appropriate entry time, taking into consideration licence level, course length and dates achieved restrictions imposed by the meet organiser.

Any events that your swimmer is eligible to enter have a green shaded checkbox; events shaded in red are not eligible for entry.

Simply check the boxes of the events that you wish to enter and either click **Submit Entry** or **Save Draft**.

If you click **Submit Entry**, your entry will be included in the entries for your Club and an Invoice will be created. You should look at the Invoices section and pay the Invoice.

If you click **Save Draft** then your entry is saved and you can come back to edit it later but you must submit the entry before the deadline if you wish to enter the meet.



Plymouth Leander Winter L2

Submit Entry | Save Draft

Meet Details

Name
Plymouth Leander Winter L2

Licence Number
2SW160994

Licence Level
Level 2

Host Club
Plymouth Leander SC

Start Date
19/11/2016

End Date
20/11/2016

Team Managers
James Andrews

Website
http://www.plymouthleander.co.uk

Description
Venue: Plymouth Life Centre, Plymouth, PL2 3DG Age Groups: 9yrs; 10/11yrs, 12/13yrs, 14/15yrs, 16/Over Ages at 31st December
Medals for top 3 in each age group

Entry Details

Entries Open
01/08/2016

Entries Close
16/10/2016

Squads
Youth Performance

Events

Event	Age Group	LQT	UQT	Entry Time	Enter?	Entry Fee
Boys Individual 50m Freestyle	Age 14	31.30		30.30	☐	£ 7.00
Boys Individual 100m Freestyle	Age 14	1:06.90		1:05.90	☐	£ 7.00
Boys Individual 200m Freestyle	Age 14	2:25.60		2:24.40	☐	£ 7.00
Boys Individual 400m Freestyle	Age 14	5:07.00		4:56.39	☐	£ 7.00
Boys Individual 50m Breaststroke	Age 14	39.70		1:00.30	☐	£ 7.00
Boys Individual 100m Breaststroke	Age 14	1:24.60		1:32.90	☐	£ 7.00
Boys Individual 200m Breaststroke	Age 14	3:02.50		NT	☐	£ 7.00
Boys Individual 50m Butterfly	Age 14	34.00		35.50	☐	£ 7.00

9. Invoices

Swim Manager creates invoices for meet entries, for Club membership and for ad-hoc charges made by your Club. To view your list of Invoices click on the **Invoices** link on the menu.

9.1 Invoice List

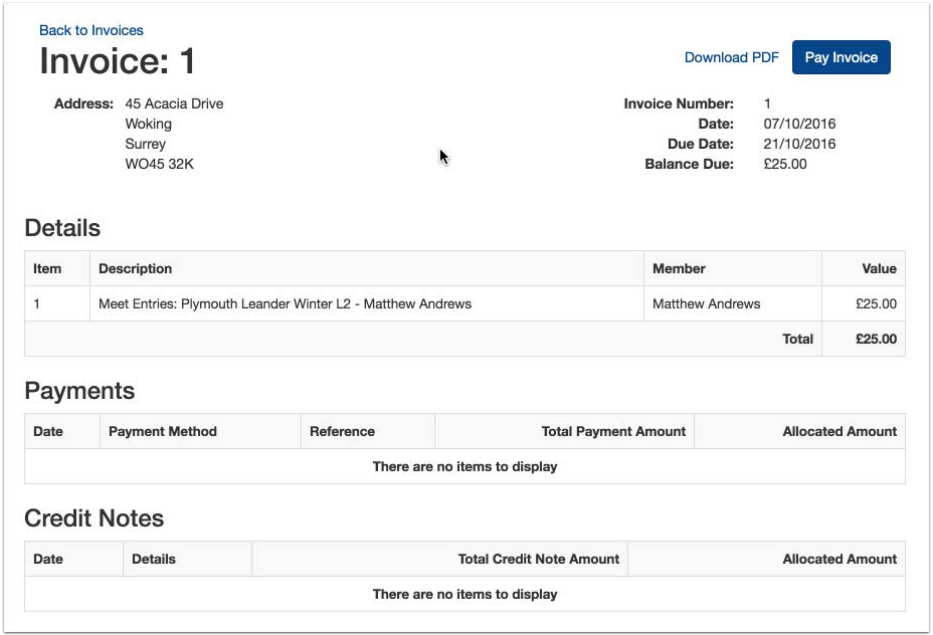
The Invoice list shows all Invoices for your account with the most revecent first. If an Invoice still has a balance due this will be shown in the Balance Due column.

To view an Invoice, download a PDF or to pay an Invoice, click the **View** button.

9.2 Invoice Details

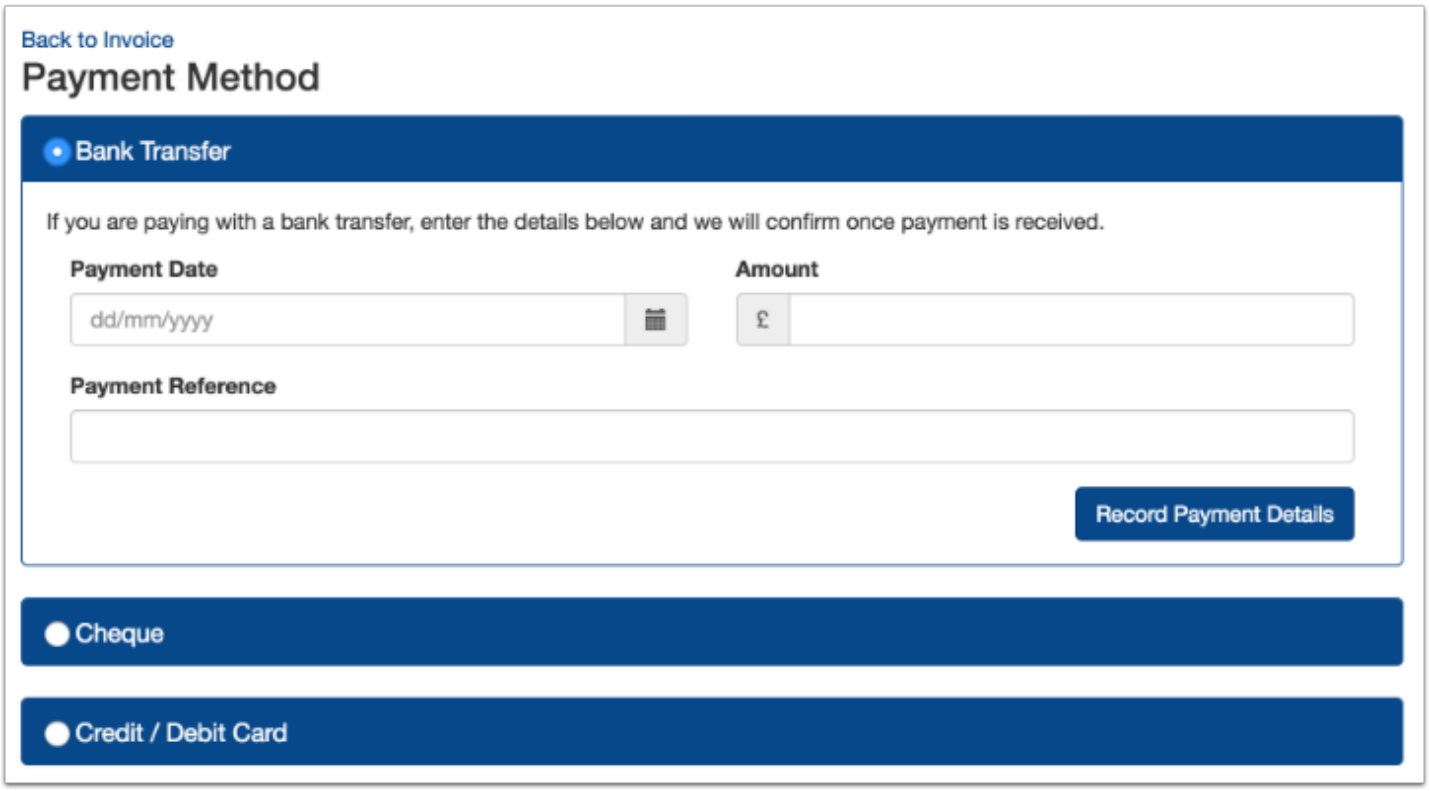
The invoice details screen shows the individual items that make up your invoice. The Payments and Credit Notes section shows you the Payments and Credit Notes that have been allocated to this Invoice in order to reduce the balance. The Balance Due in the top right will be equal to the Invoice Total minus any Payments and Credit Notes.

You can download a PDF of the Invoice using the link and if there is an outstanding balance for this Invoice you can click the Pay Invoice button to make a payment.



9.3 Paying An Invoice

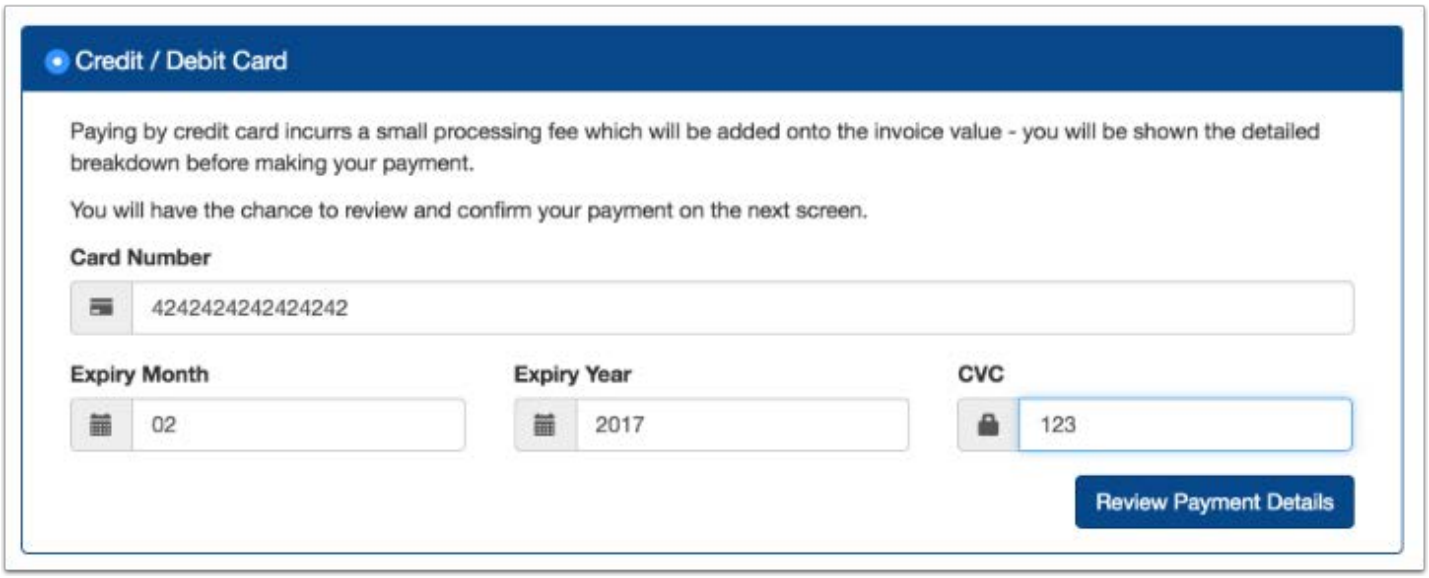
Swim Manager support Invoice payments by Credit / Debit card, Cheque, Cash and Bank Transfer. After clicking the Pay Invoice button you will be asked to select your payment method. **Note that not all payment methods may be enabled for your Club.**



9.4 Paying by Credit / Debit Card

If you select the Credit / Debit Card option you will be prompted for your credit card details. Enter your card details and click **Review Payment Details** to proceed to the next step. Credit / Debit card payments do incur additional costs (typically £1.07 on a £30 Invoice) and your Club may choose whether to absorb these fees or not. **You will be able to review your payment details on the next screen and check any charges before your card is charged.**

Your card details are not stored within Swim Manager and are processed by a PCI Level 1 (the highest level) payment processor. All connections between your computer and Swim Manager are secured using 256-bit encryption.



After clicking the **Review Payment Details** button you will see a screen similar to the one below. Check that the payment details are correct and if you are happy to proceed, click the **Pay Now** button. Your card will be charged and the payment made against your Invoice.

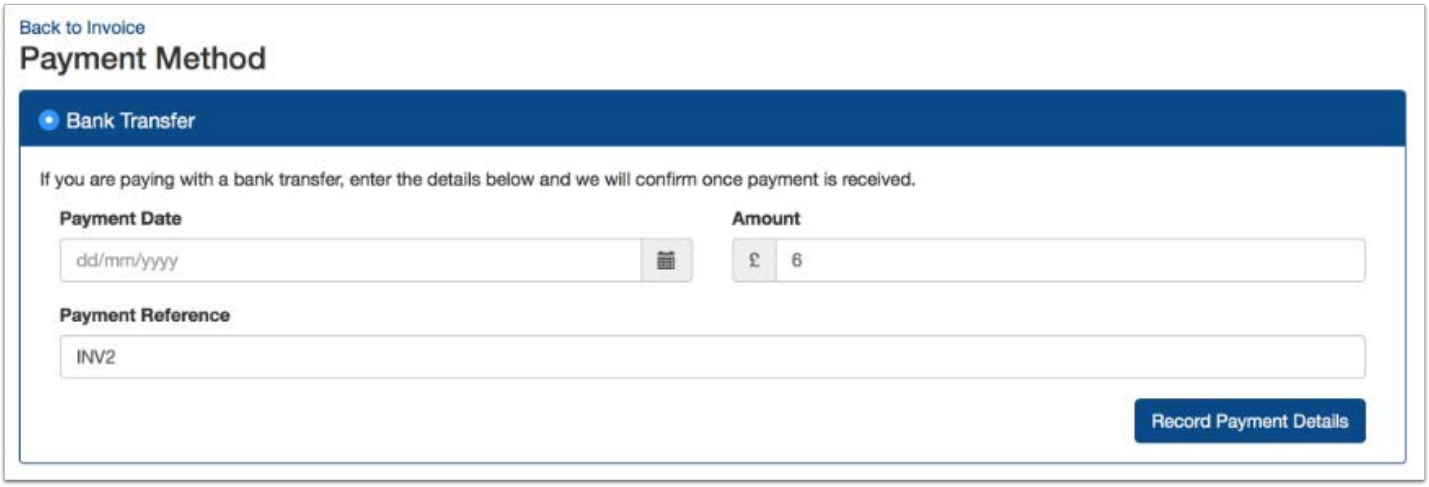
9.5 Paying an Invoice with a Bank Transfer

To make a payment by Bank Transfer, select the Bank Transfer option and complete the details as follows:

1. Enter the date on which you made the transfer
2. Enter the amount transferred
3. Enter the reference used for the transfer. We recommend that you use the invoice number and this will be pre-populated for you.

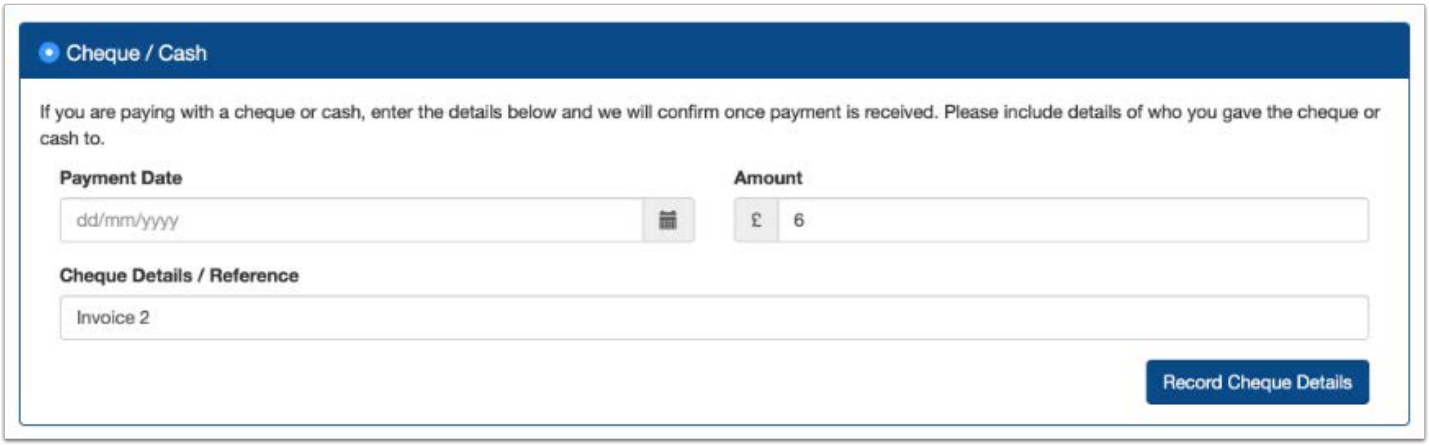
Click **Record Payment Details**. The Payment will be entered into the system and matched to the Invoice that you are paying.

Note that until the Club reconcile their bank statements, the payment will be marked as Unconfirmed.



9.6 Paying an Invoice with a Cheque / Cash

Making a payment by Cheque or Cash is extremely similar to paying by bank transfer. The main difference is that the reference can be used to provide details of how the cheque was given to the Club - for example who you gave it to or if you posted it etc. You should provide sufficient information for the Club to be able to identify your Cheque.

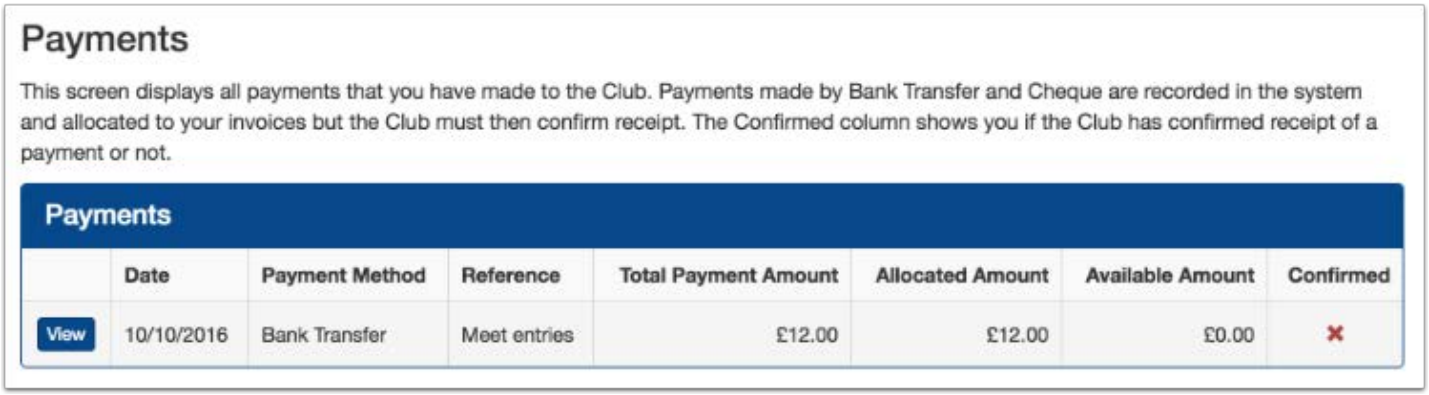


10. Payments

The Payments screen shows Payments that you have made. It includes credit / debit card payments, bank transfers and cheque / cash payments.

The Allocated Amount shows the amount of the payment that has been allocated to Invoices and the Available Amount shows the amount remaining that can be used against new Invoices. If there is an amount available here then it will be automatically allocated to new Invoices when they are generated.

The Confirmed column shows whether the payment has been confirmed as being received by the Club. Credit /debit card payments are automatically confirmed but for cheques, cash and bank transfers the Club must check their bank statements and confirm receipt of the payment in Swim Manager.



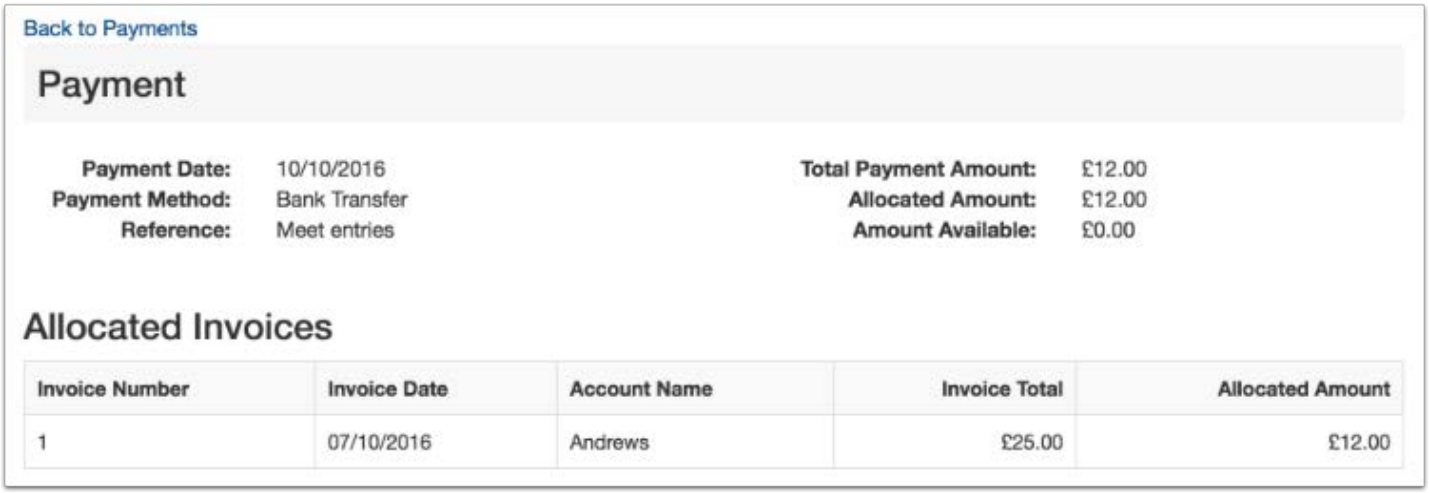
Payments

This screen displays all payments that you have made to the Club. Payments made by Bank Transfer and Cheque are recorded in the system and allocated to your invoices but the Club must then confirm receipt. The Confirmed column shows you if the Club has confirmed receipt of a payment or not.

Payments

	Date	Payment Method	Reference	Total Payment Amount	Allocated Amount	Available Amount	Confirmed
View	10/10/2016	Bank Transfer	Meet entries	£12.00	£12.00	£0.00	✖

Clicking on the **View** button will show the details of the Payment and any Invoices that it has been allocated to.



Back to Payments

Payment

Payment Date:	10/10/2016	**Total Payment Amount:**	£12.00
Payment Method:	Bank Transfer	**Allocated Amount:**	£12.00
Reference:	Meet entries	**Amount Available:**	£0.00

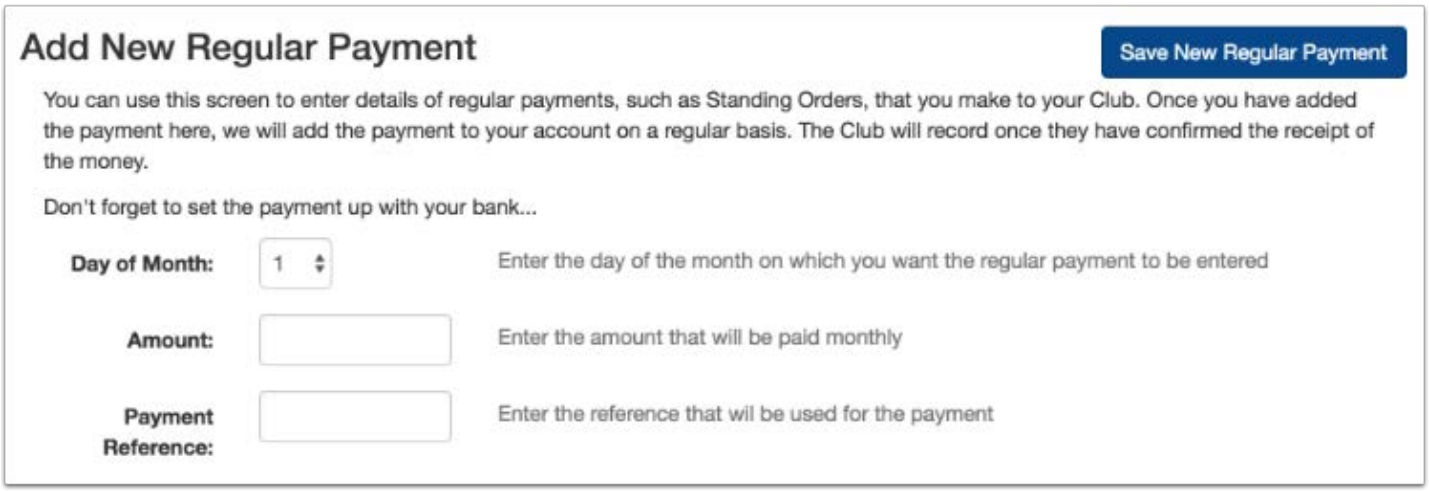
Allocated Invoices

Invoice Number	Invoice Date	Account Name	Invoice Total	Allocated Amount
1	07/10/2016	Andrews	£25.00	£12.00

11. Recurring Payments

If you pay your Club membership regularly by standing order or monthly bank transfer with the same reference each month, Swim Manager allows you to set this up so that you do not need to manually enter the payment each month.

To add a new Recurring Payment, click the **Add New Regular Payment** button and complete the details as shown below.

Swim Manager will automatically create a new Payment for you each month with the appropriate reference. If you have an open Invoice for your Club membership, the Payment will also be automatically applied to the Invoice.

If there is any remaining amount of the Payment after paying your monthly Invoice, the amount will be used for new Invoices as they are generated.