

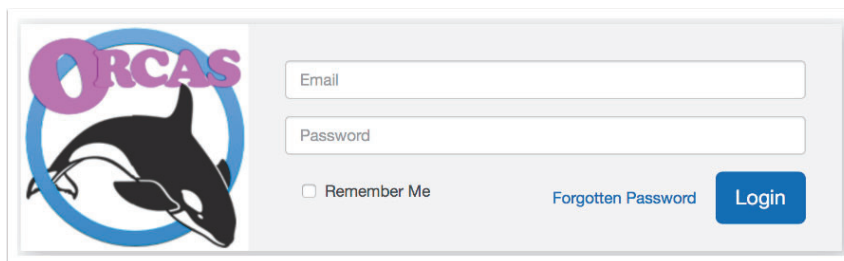
Your swimming club has signed up for Swim Manager which is an easy to use system for managing a UK swimming club. The system makes it easy for you as a parent to update your information, check upcoming meets and enter them, pay invoices and check the times of your swimmers.

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.

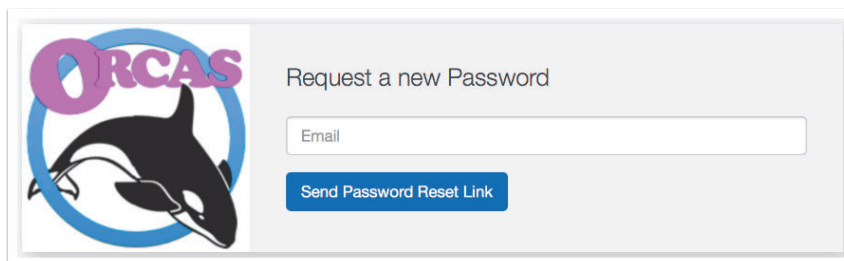
To log in to Swim Manager for the first time follow these steps:

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

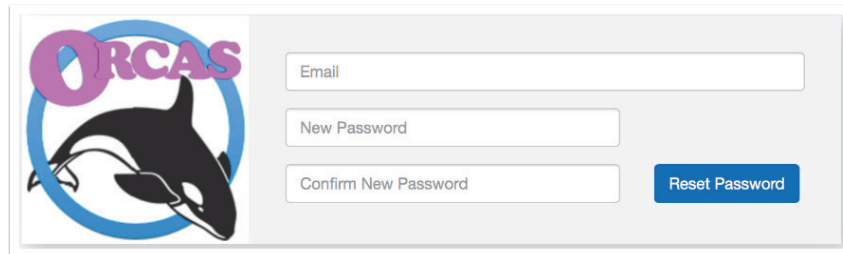
The login form for ORCAS Swim Manager. On the left is the ORCAS logo, which features a black orca swimming inside a blue circle with the word "ORCAS" in pink. To the right of the logo are two input fields: "Email" and "Password". Below the "Email" field is a checkbox labeled "Remember Me". To the right of the checkbox is a link labeled "Forgotten Password" in blue. At the bottom right is a blue button labeled "Login".

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.

The password reset form for ORCAS Swim Manager. On the left is the ORCAS logo. To the right of the logo is the heading "Request a new Password". Below the heading is an input field labeled "Email". At the bottom is a blue button labeled "Send Password Reset Link".

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

A screenshot of a web form for resetting a password. On the left is the ORCAS logo, which features a black orca swimming inside a blue circle with the word "ORCAS" in pink. To the right of the logo are three input fields: "Email", "New Password", and "Confirm New Password". A blue button labeled "Reset Password" is positioned to the right of the "Confirm New Password" field.

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**

Account

Members

Teams

Invoices

Payments

Regular Payments

Meets

Messages

Account: Andrews

Edit

Address

45 Acacia Drive
Woking
Surrey
WO45 32K

Account Balance

Total Invoices:	£25.00	1
Total Credit Notes:	£0.00	2
Confirmed Payments:	£25.00	3
Confirmed Balance:	£0.00	4
Unconfirmed Payments:	£0.00	5
Account Balance:	£0.00	6
Monthly Payment Total:	£0.00	

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

ORCAS

My Account

Manage Club

Logged in as James Andrews

Stop

Account

Members

Teams

Invoices

Payments

Regular Payments

Meets

Messages

Members

2 Members Displayed

	Name	Date of Birth	Age Now	Age End of Year	ASA Number	ASA Category	Squad
Edit	James Andrews	12/05/1975	41	41	3432644	Category 3	
Edit	Matthew Andrews	08/02/2002	14	14	903634	Category 2	Youth Performance

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

Matthew Andrews

Active Member

Edit

Member Details

Photo Consent

Times

PBs

Messages

Personal Details

First Name Matthew	Last Name Andrews	Known As Matt	Middle Name
Email		Phone	Mobile Phone
Gender Male	Date of Birth 08/02/2002	Age (Now) 14	Age (End of Year) 14

Swimming Details

ASA Number 903634	ASA Category Category 2	Squad Youth Performance	Payment Plan Youth Performance Termly Plan
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Medical Details

Doctor's Name Dr Medic	Doctor's Phone 01674 343259	Surgery The Surgery, Woking
Medical Information Allergic to fly sets		

Account Permissions

☒ Receive Account Emails	☒ Emergency Contact	☒ Can Manage 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.

Matthew Andrews

Active Member

Edit

Member Details

Photo Consent

Times

PBs

Messages

Parents 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 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

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.

Matthew Andrews Active Member Edit

[Member Details](#)
[Photo Consent](#)
[Times](#)
[PBs](#)
[Messages](#)

Times							
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.

[Back to Members](#)
Matthew Andrews Active Member Edit

[Member Details](#)
[Photo Consent](#)
[Times](#)
[PBs](#)
[Messages](#)

Long Course							
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.

Edit Member Details

Save Member Changes

Personal Details

First Name:

Last Name:

Known As:

Middle Name:

Email:

Phone:

Mobile Phone:

Gender:

Male ▾

Date of Birth:

08/02/2002 📅

6.2 Editing Medical Details

Medical Details

Doctor's Phone:



Doctor's Name:

Surgery:

Medical Information:

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.

Account Permissions

☐ Receive Account Emails☐ Emergency Contact☐ Manage Account

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.

Teams		
Teams		1 Teams Displayed
Name	Date	Attendance
Arena League Round 1	01/10/2016	Matthew Andrews ☒ Confirm ☐ Decline

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.

[Back to Teams](#)

Arena League Round 1

Team Details

Team Name	Event Date	Age At Date
Arena League Round 1	01/10/2016	01/10/2016

Event Details

The coach will leave from the Leisure Centre at 4:00pm sharp. Please make sure you arrive in plenty of time. All swimmers are expected to travel on the coach but may travel back with their parents. For parents driving down the address for the leisure centre is: Green Park Leisure Centre Brighton BN1 4JN

Members

1 Member Displayed

	Name	DoB	Age	ASA#
☒ Confirm ☐ Decline	Matthew Andrews	08/02/2002	14 (14)	903634

Documents

0 Documents Displayed

Title	Filename	Type	Date
There are no documents to display			

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.

Meets							
Upcoming Meets							1 Meet Displayed
	Member	Meet Name	Licence Number	Level	Start Date	Entries Open	Closing Date
Enter Meet	Matthew Andrews	Plymouth Leander Winter L2	2SW160994	Level 2	19/11/2016	01/08/2016	16/10/2016

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

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
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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 recent 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.

Account	Account: Andrews			
Members				
Teams				
Invoices				
Payments				
Regular Payments				

Invoices				
Invoice No.	Invoice Date	Total	Balance Due	
1	07/10/2016	£25.00	£25.00	View

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.

[Back to Invoices](#)

Invoice: 1

[Download PDF](#)
[Pay Invoice](#)

Address: 45 Acacia Drive
Woking
Surrey
WO45 32K

Invoice Number: 1
Date: 07/10/2016
Due Date: 21/10/2016
Balance Due: £25.00

Details

Item	Description	Member	Value
1	Meet Entries: Plymouth Leander Winter L2 - Matthew Andrews	Matthew Andrews	£25.00
Total			£25.00

Payments

Date	Payment Method	Reference	Total Payment Amount	Allocated Amount
There are no items to display				

Credit Notes

Date	Details	Total Credit Note Amount	Allocated Amount
There are no items to display			

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.**

[Back to Invoice](#)

Payment Method

☒ Bank Transfer

If you are paying with a bank transfer, enter the details below and we will confirm once payment is received.

Payment Date dd/mm/yyyy	Amount £
--	---

Payment Reference

Record Payment Details

☐ Cheque

☐ Credit / Debit Card

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.

Credit / Debit Card

Paying by credit card incurs a small processing fee which will be added onto the invoice value - you will be shown the detailed breakdown before making your payment.

You will have the chance to review and confirm your payment on the next screen.

Card Number

4242424242424242

Expiry Month

02

Expiry Year

2017

CVC

123

Review Payment Details

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.

Confirm Payment

Pay Now

Payment Details	
Credit Card	Visa ending 4242
Balance Due	£25.00
Credit Card Charges	£1.42
Total Credit Card Payment	£26.42

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.

[Back to Invoice](#)

Payment Method

• Bank Transfer

If you are paying with a bank transfer, enter the details below and we will confirm once payment is received.

Payment Date

Amount

Payment Reference

[Record Payment Details](#)

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.

Cheque / Cash

If you are paying with a cheque or cash, enter the details below and we will confirm once payment is received. Please include details of who you gave the cheque or cash to.

Payment Date

Amount

£ 6

Cheque Details / Reference

Record Cheque Details

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.

Regular Payments [Add New Regular Payment](#)

Regular Payments			1 Regular Payment Displayed
	Reference	Day of Month	Amount
Edit	Andrews	1	£35.00

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.

Add New Regular Payment [Save New Regular Payment](#)

You can use this screen to enter details of regular payments, such as Standing Orders, that you make to your Club. Once you have added the payment here, we will add the payment to your account on a regular basis. The Club will record once they have confirmed the receipt of the money.

Don't forget to set the payment up with your bank...

Day of Month:

Enter the day of the month on which you want the regular payment to be entered

Amount:

Enter the amount that will be paid monthly

Payment Reference:

Enter the reference that will be used for the payment