



Teaching skills for life, today.



New Swim School Booking Systems

Customer Portal Information Guide
2018

Welcome to Dean Greenwood Swim School's Customer Accounts

By now you will be used to our **new booking system** which we introduced in May. This booklet introduces stage two – our **Customer Portal**.

The portal offers some exciting new features to make your experience with us easy and convenient including making your own bookings including make up lessons, reporting absences, viewing progress and setting up automatic payments. Not only will automatic payment be the most convenient payment method (no more queuing or remembering to pay every month!), **you will also receive a 4% discount when paying via this method.**

Throughout this booklet we will talk you through exactly how to register for the portal and how to use it. Any time you require any help please just see our reception team who will be happy to assist in setting it up and demonstrating how it works.



Dean Greenwood
Director

How do I access & use the Customer Portal?

If you'd prefer to watch how to set up and use your customer account please look up our online video by typing in this URL into your web browser:

<https://mailchi.mp/dgss/customerportal>

Signing Up

Step 1: You'll be emailed a link to click on from our reception team. Please contact us if you need it resent.

Customer Account Signup email from Dean Greenwood Swim School

Dean Greenwood Swim School

You can now sign into your own account with Udio.

Click on the link below to sign up.

<https://accounts.sandbox.ud.io/dean-greenwood-swim-school/signup?email=swimschool%40mailinator.com>

This is a Customer Account Signup email from Dean Greenwood Swim School on Udio.

This email and any attachments are confidential and may contain legally privileged and/or copyright material. You should not read, copy, use or disclose any of the information contained in this email without authorisation. If you have received it in error please contact us by return email and then delete this email. There is no warranty that this email is error or virus free.

Step 2: Set your own password.

Please read our Terms of Service & Privacy Policy by clicking the links at the bottom of this page. Once you sign up you agree to these.

Sign Up for Dean Greenwood Swim School's Customer Account


Already have an account? Then please [sign in](#).

E-mail
swimschool@mailinator.com

Password

Sign Up

or

 Sign Up with Facebook

Thank you for signing up to our customer portal.

You must advise us via email, phone call or speaking with reception if you sign up to automatic payment so we can amend your pricing to enable you to receive the 4% discount (learn to swim lessons only).

You will need to speak with the swim school office for stopping swimming lessons.

Creating and using an account means your acceptance of [Terms of Service](#) and [Privacy Policy](#)

Step 3: Go back to your email inbox and click on the link in the confirmation email

Hello from Customer Accounts

You have received this email because it was used to sign up for Customer Accounts.

If you did not sign up for Customer Accounts do not click this link.

To complete sign up and confirm your email, please go to https://accounts.sandbox.ud.io/confirm-email/MTU1:1fFSs:UFEj6_4uLQleW3wpXGFPC8pXAhk/

Step 4: You will be taken into your account where you can see your bookings, cancel bookings if you're going to miss a lesson (not permanently – please contact the swim school for this), view your account balance, book makeup lessons, enable automatic payment, change day/time, view invoices and receipts, add family members, edit contact details, make new bookings and see achievements.

Dean Greenwood Swim School Bookings People Progress Billing Account

Dean Greenwood Swim School account management

You have 1 unpaid invoice [View Account](#)

Your Account Balance
-\$17.50

[Add Card](#) [Add Bank Account](#)

Upcoming Bookings

Friday	27/07/2018	15:30	Swim School	Advanced Beginner	View & Manage
	03/08/2018	15:30	Swim School	Advanced Beginner	View & Manage
	10/08/2018	15:30	Swim School	Advanced Beginner	View & Manage
	17/08/2018	15:30	Swim School	Advanced Beginner	View & Manage
	24/08/2018	15:30	Swim School	Advanced Beginner	View & Manage

[Enroll into a new Class](#) [Change Day & Time](#) [View all Bookings](#)

How to manage my booking e.g. report an absence, change day/time, book a makeup.

Bookings can be managed from the home page by clicking on the upcoming bookings area at the bottom of the page, or by clicking 'bookings' at the top of the page.

To cancel a lesson:

- Click '**View & Manage**' next to the date you want to report an absence for
- Click '**Unable to Attend**', then click '**Confirm**'.

Please note you can only report absences up to 28 days in advance.

N.B. If you cancel a lesson and then realise you can actually make your regular class time, you cannot reverse a cancellation so will need to book back into your usual class using the make up voucher.

Dean Greenwood Swim School Bookings People Progress Billing Account

Booking Details

27/07/2018 15:30 NZST Advanced Beginner at Training Town

Swim School

Instructor: Sophie

Spots: 3

[Unable To Attend](#) [Change Day & Time](#) [View all Bookings](#)

- You will automatically be issued with a makeup (with one month expiry)

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To book a make up:

- Anytime you have a makeup owed you will see this on the homepage or under vouchers (at the top)

Dean Greenwood Swim School account management

Your Account Balance: **-\$17.50**

You have 1 unpaid invoice

You have 1 voucher [Make Booking with Voucher](#)

Person	Voucher	Expiry
Swim School	Make Up	27/08/2018

- To book the makeup lesson owed, simply click on **'Make Booking'** as shown in image above
- Select the name of the person you're making the booking for
- You will be given a list of all classes available for a make up lesson for the week ahead.

Please note make ups can only be booked a maximum of 1 week in advance

Make Booking

You have 1 Make Up voucher

New booking for Swim School

Choose Day & Time

Weekday	Date & Time	Course	Spots	Instructor
Thursday	15:30 26/07/2018	Advanced Beginner	2	Alex
	17:30 26/07/2018	Advanced Beginner	3	
Saturday	10:00 28/07/2018	Advanced Beginner	2	Bern
	10:30 28/07/2018	Advanced Beginner	4	Ally
Sunday	09:00 29/07/2018	Advanced Beginner	1	Natalie
Monday	15:30 30/07/2018	Advanced Beginner	1	Braedon
	17:00 30/07/2018	Advanced Beginner	1	
Tuesday	16:00 31/07/2018	Advanced Beginner	2	
	17:30 31/07/2018	Advanced Beginner	5	

- Click on the session you'd like to book in for and click **'Make Booking'**
- This will now be visible in your list of upcoming bookings

N.B. if you're booking a makeup for multiple children who you want to coordinate times for, you will need to do one at a time and may need to note down times available before booking to see where you can get them together.

To Transfer Classes

- Click **'Change Day & Time'** as shown in the image below

Dean Greenwood Swim School account management

Your Account Balance: **-\$17.50**

You have 1 unpaid invoice

Upcoming Bookings

Day	Date	Time	Location	Level	Action
Friday	27/07/2018	15:30	Swim School	Advanced Beginner	View & Manage
	03/08/2018	15:30	Swim School	Advanced Beginner	View & Manage
	10/08/2018	15:30	Swim School	Advanced Beginner	View & Manage
	17/08/2018	15:30	Swim School	Advanced Beginner	View & Manage
	24/08/2018	15:30	Swim School	Advanced Beginner	View & Manage

[Enroll into a new Class](#) [Change Day & Time](#) [View all Bookings](#)

- You will be taken to a list of all available classes of the current level (as shown in image above when booking a make up). Click on the day/time that you'd like to change to.
- Select the date and time of the first session in this new class (*remember you can only change 1 week in advance*). Click **'Confirm First Session'**.

Dean Greenwood Swim School

Change Day & Time

Swim School Friday 15:30 Advanced Beginner (next session 2018-08-03)

Friday 15:30 » Tuesday 17:30

First Session

31/07/2018 17:30 [Confirm First Session](#)

- Double check the details and then click **'Confirm New Date & Time'**.

To Make a New Booking

- Click **'Enrol into a New Class'** from the homepage
- Select the person you would like to make a booking for (please note if you're adding new family

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members who haven't swum with us previously they may need an assessment to establish their level first)

- Select the course you'd like to book into (you will need to select the correct tab first i.e. mostly *Learn to Swim*)

- Select the time from the list of options that you would like to make a booking into
- Select the date of your first session (**this can only be 1 week in advance**). Click '**Confirm First Session**'
- Select the price package – remember to let the Swim School Reception know via email, phone or in person if you're signing up to Automatic Payment so we can apply your 4% discount.

- Click '**Confirm Booking & Reserve Spot**'
- You can then make a booking for another person, but the first one needs to be completed *within 10mins*.
- Click '**Complete Booking**' to finalise. If you're signing up to Automatic Payment simply click '**Add Bank Account**' or '**Add Card**' to set this up – full instructions for this process are on page 10 of this booklet

How do I track my child's progress in the portal?

- Click on '**Progress**' in the menu bar at the top
- Scroll to the level your child is currently at – you will see a progress indicator highlighted in a different colour
- Click on the badge and you will be able to see all the objectives for that level and which ones have been achieved. Click the information icon to view the date on which each objective was achieved.

Please note this may not change weekly as we can only ensure the swimmer has mastered the skill by seeing it demonstrated consistently. Please speak to us on poolside if you have any concerns at anytime.

How do I add a family member or change my contact details?

Simply click the '**People**' menu at the top of the page and from here you can add family members details and edit your contact details (address and phone number). Please note you need to contact the swim school to change your email address as this affects your account login.

How do I view my receipts, invoices and make payment?

- Click either on '**View Account**' from the homepage, or '**Billing**' from the top menu.
- You will be able to view both open/unpaid invoices and closed/paid invoices. To view paid invoices please click '**Show Closed**'
- Click 'Open' next to any invoice that you'd like to view more detail on.

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The description in the middle of the page will show who the invoice is for.

If it is an invoice you have paid, your payment method and the date paid will be shown at the bottom. These can be printed by right clicking and 'Print Page'

Invoice wneg099-INV1

[Go back](#)

Tax invoice wneg099-INV1
Date issued 25/07/2018
Account wneg099
Facility Training Town

Charges

Date	Description	Tax	Amount
27/07/2018	Learn to Swim, Tuesday 17:30 Z2OG, Training Town (Swim School)	\$2.28	\$17.50
Total		\$2.28	\$17.50

Payments

Date	Method	Amount	Included tax
25/07/2018	Cash	\$17.50	\$2.28

How do I set up automatic payment?

- Click on 'Add Card' or 'Add Bank Account' (depending on how you would like to pay each month) from the homepage. \

Dean Greenwood Swim School Bookings People Progress Billing Account

Dean Greenwood Swim School account management

Your Account Balance

-\$17.50

You have 1 unpaid invoice [View Account](#)

[Add Card](#) [Add Bank Account](#)

- Select your facility you swim at and click 'Proceed'
- Enter your bank or card details as prompted onscreen.

Remember to review the terms of service by clicking the link at the bottom of this page.

Add Bank Account

Customer Name: Swim School
Address: 30a Bellevue Rd
City: Mt Eden
State: Auckland
Post Code: 1024
Phone: 123456
Email: swimschool@mailinator.com
Country code: NZ
BSB: 123456
Account Number: 7891011121
Account Name: Swim School

[Proceed »](#)

By adding direct debit information to your billing account you indicate your acceptance of [Terms of Service](#) and [Privacy Policy](#) of Dean Greenwood Swim School.

If you've entered a bank account, you will then be taken to a Direct Debit authorisation screen via Merchant Warrior (this is the gateway provider for the automatic payments).

Please note: this is not needed if paying via credit card. In this case you will simply add your card details.

- Complete all the account details, double check your contact details, tick the authority and T&C's boxes and finally click 'Submit'.
- You will be emailed a copy of the authorisation attached as a PDF.

MERCHANT Warrior

DIRECT DEBIT AUTHORISATION

Dean Greenwood Swim School

ACCOUNT DETAILS

Account Name: Swim School
Account Number: Bank 12 Branch 3456 Account No 7891011 Suffix 12
ASB Bank

CUSTOMER DETAILS

Customer Name: Swim School Email: swimschool@mailinator.com
Address: 30a Bellevue Rd City: Mt Eden
State: Not Applicable Post Code: 1024
Country: New Zealand Contact Phone: 123456

I confirm I have sole authority over the bank account nominated above
A confirmation letter will be sent to you within 5 business days. Should you wish to query, amend or cancel these instructions please [contact us](#).
If you do not have sole authority over the nominated bank account, please complete a Direct Debit Authority and return it to us.

I/We have read and accept the Terms and Conditions, and authorise Merchant Warrior to debit my/our account

[SUBMIT](#)

Secured by Merchant Warrior

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- Finally remember to contact the swim school reception to let us know you have signed up for automatic payment so we can apply your 4% discount.
- The automatic payment is now set up and you will be charged on the 1st of every month.
- Please note: there is no minimum term for this and you can stop it at any point by click '**Disable Auto Payment**' through the customer portal.
- If your payment rejects you will be contacted by the swim school to arrange an alternative payment method. The full (non-discounted) fee will now be due and the rejection fee of \$2.00 will be added onto the total owing.
- To cancel your automatic payment at anytime simply go to the Billing section on the Customer Portal and click '**Disable Auto Payment**'. To delete your payment method details select deactivate next to the bank account number or card details you'd like to delete.

N.B. if you add in both bank account and credit card details, Udio will take the money from the bank account first.

Payment Methods

Change Bank Account
Add Card

Bank account: 12x-xxx/...12 Swi... Deactivate

Automatic payment is enabled.
Payment will automatically be made within 6 hours for all new invoices.

The portal can be saved to your homescreen on your phone or onto your desktop to allow quick, direct access into it.

For phones/tablets: simply open up the portal in a browser, click the share icon and Add to Home Screen. Rename the icon *DGSS Portal*.

For laptops/desktops: open up Customer Accounts in a web browser and drag the web address onto the desk top. Rename the link *DGSS Portal*.

If you need any assistance please speak with our reception team or call us on 0800 SWIM NOW.

Mt Eden mteden@dgss.co.nz 09 630 1123 **New Windsor** newwindsor@dgss.co.nz 09 627 3026
Kelston kelston@dgss.co.nz 09 827 9635 **Massey** massey@dgss.co.nz 09 622 3153

Website info: **www.dgss.co.nz** ~ Individual site information and contacts are available here.

Also available at the website "Live Chat" ~ ask questions live.