



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 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](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

Password

[Sign Up](#)

or

[!\[\]\(a1abaf3a019cde91b9bedfeab4d07b96\_img.jpg\) 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 signup for Customer Accounts.

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

To complete signup and confirm your email, please go to [https://accounts.sandbox.ud.io/confirm-email/MTU1:1fiFSs:UFEj6\\_4uLQIeW3wpXGFPC8gXAhk/](https://accounts.sandbox.ud.io/confirm-email/MTU1:1fiFSs:UFEj6_4uLQIeW3wpXGFPC8gXAhk/)

**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

Your Account Balance  
-\$17.50

You have 1 unpaid invoice [!\[\]\(0a430dbc7d06af85b831adcff8150400\_img.jpg\) View Account](#)

[!\[\]\(5aad5154cab86cea48dd9d10e2d01884\_img.jpg\) Add Card](#) [!\[\]\(a86311389280ae0b3c35372f357d29e9\_img.jpg\) Add Bank Account](#)

### Upcoming Bookings

Friday	27/07/2018	15:30	Swim School	Advanced Beginner	<a href="#">View &amp; Manage</a>
	03/08/2018	15:30	Swim School	Advanced Beginner	<a href="#">View &amp; Manage</a>
	10/08/2018	15:30	Swim School	Advanced Beginner	<a href="#">View &amp; Manage</a>
	17/08/2018	15:30	Swim School	Advanced Beginner	<a href="#">View &amp; Manage</a>
	24/08/2018	15:30	Swim School	Advanced Beginner	<a href="#">View &amp; Manage</a>

[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)

continued over...

## To book a make up:

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

The screenshot shows the Dean Greenwood Swim School account management interface. At the top, there are tabs for Booking, Vouchers (which is highlighted with a red oval), People, Progress, and Billing. Below the tabs, the page title is "Dean Greenwood Swim School account management". A section titled "Your Account Balance" shows a balance of "-\$17.50". To the right, there's a message "You have 1 unpaid invoice" with a "View Account" button. Below this, there are buttons for "Add Card" and "Add Bank Account". A prominent message "You have 1 voucher" is displayed, with a "Make Booking with Voucher" button. At the bottom, there are columns for Person (Swim School), Voucher (Make Up), and Expiry (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

The screenshot shows the "Make Booking" interface. It starts with a message "You have 1 Make Up voucher". Below this, it says "New booking for Swim School". The next section is "Choose Day & Time". It lists available sessions for the week:

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

The screenshot shows the Dean Greenwood Swim School account management interface. At the top, there are tabs for Booking, Vouchers, People, Progress, and Billing. Below the tabs, the page title is "Dean Greenwood Swim School account management". A section titled "Your Account Balance" shows a balance of "-\$17.50". To the right, there's a message "You have 1 unpaid invoice" with a "View Account" button. Below this, there are buttons for "Add Card" and "Add Bank Account". A button labeled "Change Day & Time" is circled with a red oval. At the bottom, there's a section titled "Upcoming Bookings" with a table of available classes and a "View all Bookings" button.

- 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'.

The screenshot shows the "Change Day & Time" interface. It starts with the message "Swim School Friday 15:30 Advanced Beginner (next session 2018-08-03)". Below this, it says "Friday 15:30 » Tuesday 17:30". The next section is "First Session" with a dropdown menu showing "31/07/2018 17:30" and a "Confirm First Session" button.

- 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

continued over...

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)

### New Enrolment

Swim School already has bookings [Change day & time instead of new enrolment](#)

Facility: Training Town [Change facility](#)

Swim School [Other person](#)

Choose Course

[Pool Hire](#) [Learn to Swim](#) [Other](#)

[Parent & Child 6-12 months](#)

[Parent and Child 12-24 months](#)

[Parent and Child 24-36 months](#)

- 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.

### New Enrolment

Swim School already has bookings [Change day & time instead of new enrolment](#)

Facility: Training Town [Change facility](#)

Swim School [Other person](#)

Beginner [Change course](#)

Monday 16:00 [Change day & time](#)

First Session: Monday 30/07/2018 16:00

Choose Package

[Learn to Swim: \\$70.00 per month \(session pricing\)](#)

- 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.

Dean Greenwood Swim School [Bookings](#) [People](#) [Progress](#) [Billing](#) [Account](#)

### Progress of Swim School

Learn to Swim: Preschool 3

50% [Unassisted streamline kicking 6m](#) [Completed on: 25/7/2018](#)

✓ Unassisted arms by side back kicking 6m [i](#)

✓ Unassisted arms by side back kicking 6m [i](#)

## 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.

Dean Greenwood Swim School [Bookings](#) [People](#) [Progress](#) [Billing](#) [Account](#)

### Outstanding Invoices

Invoice Code	Issued	Total	Amount Owing
wneg099-INV2	25/07/2018	\$17.50	\$17.50 Open <a href="#">i</a>

### Closed Invoices

Invoice Code	Issued	Total	Amount Owing
wneg099-INV1	25/07/2018	\$17.50	\$0.00 Open <a href="#">i</a>

### Payment Methods

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

continued over...

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:

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: **7891011121**

Bank: **ASB Bank** Branch: **3456** Account No: **7891011121** Suffix: **12**

**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**

continued over...

- 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...	<a href="#">Deactivate</a>
Automatic payment is enabled. Payment will automatically be made within 6 hours for all new invoices.	
<a href="#">Disable auto payment</a>	

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.

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**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](http://www.dgss.co.nz) ~ Individual site information and contacts are available here.

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

