

Account Admin - Quick Start Guide

- 1 **Account/Member Overview** - Select this option at any time to give you an on screen overview.
- 2 **Powerful Search** - Enter in either a fuzzy search logic (just a few of the letters within the search) or the entire search parameter to quickly view all related matches.
- 3 **Customize Filters** - Select to begin your customization of your view. See page 2.
- 4 **Customize Columns** - Select to begin the customization of your view. See page 2.
- 5 **Saved Views** - Select to save or bring up your customized view. These are for you only! See page 3.
- 6 **Edit** - Select one, many or all accounts and then edit to access all edit functions including multi-edit.
- 7 **Communicate** - Select one, many or all and then communicate to send emails, login & passwords etc.
- 8 **Export** - Select one, many or all and Export to export to a [CUSTOM](#) spreadsheet or other printing options.
- 9 **Add an Account** - This will allow you to add an account easily. Just fill in the fields and send the login/password instructions.
- 10 **Edit Account(s) View** - Once you have multiple accounts to edit you can select the 'n' shortcut key to go to the next or 'p' for previous. Make any changes and save before moving to the next account.
- 11 **Email Login Instructions and Reset Password** - You can select the reset password to reset anyone's password for them if necessary. You can also quickly email them their login instructions.

Account Management

Need Help ? Keyboard shortcuts guide: Shift + ? Account/Member Admin Overview

Accounts Members USA Swimming Registration

7 Accounts + Add Account

Current View: Example 1: Active Account Address Information sorted BY LAST IN Column View

Customize Filters Customize Columns Saved Views

Edit Communicate Export

Search for accounts

Last Name	First Name	Address	City	State	Zip	Last In
Banfield	Shaun	54 Juniper Way	Bend	OR	97701	12/9/13
Joplin	Jan	123 marks	Bend	OR	97745	12/11/13
Bedford	Shaunagh	123 Juniper Way	Bend	OR	97701	11/7/14

Account Management

Need Help ? Edit Help Keyboard shortcuts guide: Shift + ? Account/Member Admin Overview

Accounts Members USA Swimming Registration

148 Accounts (3 selected) + Add Account

Current View: Example 1: Active Account Address Information sorted BY LAST IN Column View

Customize Filters Customize Columns Saved Views

Edit Communicate Export

Search for accounts

First Name	Address	City	State	Zip	Last In
Raymond & Jan	53 Frederica Street	Kenford	OR	12890	3/14/14
Andy	123 Main Street	Anytown	State	00000	1/9/14

Edit Account(s)

Maureen Jackson

Account Info Members Payment Setup Membership Uses Schedule Swim Lessons

Account Contact Information

First Name: * Last Name: *

Maureen Jackson

Login Email: * Unverified Email 1:

shaunaghbedford@team.com

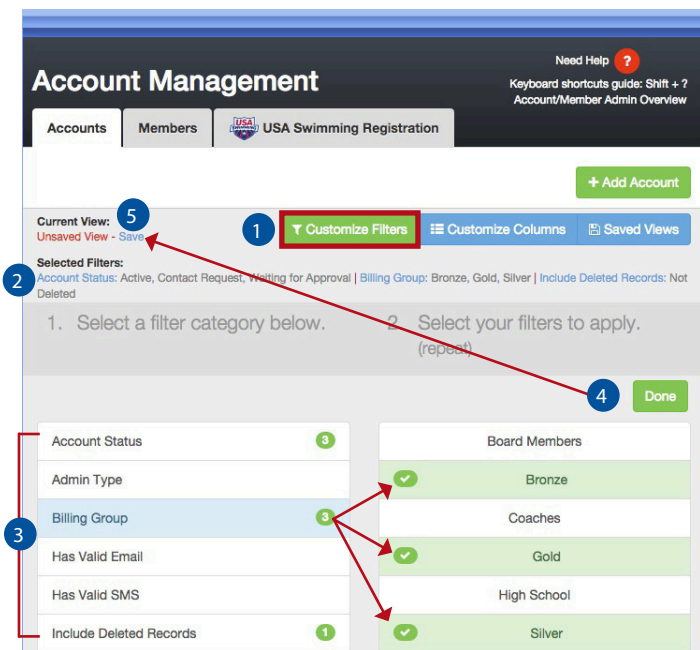
[Add admin accounts](#)

[Customize, Customize, Customize](#)

[How to Send Login & Password](#)

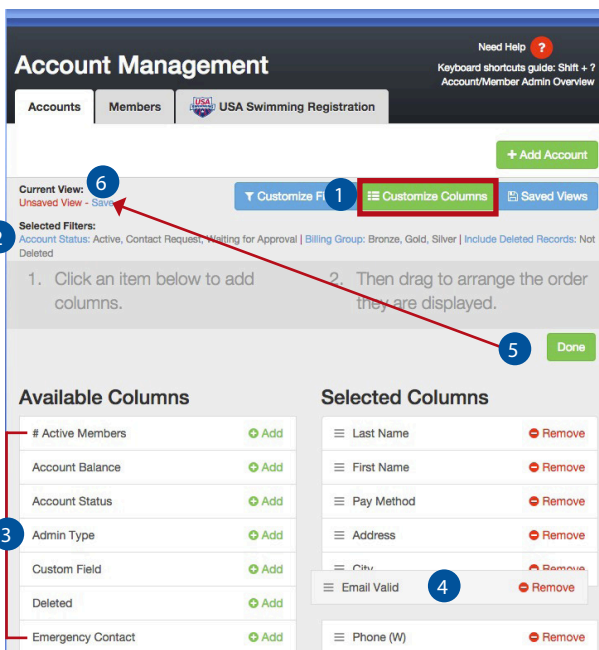
Account Admin - Customize!

Customize Filters



- 1 **Customize Filter** - Select to open up all filter options for this tab.
- 2 **Filter Summary** - As you make filter options, they will show on this line so you have a summary of what filters will be applied
- 3 **Filter Category** - When you select a category, the options to apply will appear on the right. As you select an option the number will incrementally update to notify you of the number of filters being applied to that category.
- 4 **DONE** - When all of your filters are correct, select Done to apply.
- 5 **Save** - Is this search going to be used again? Select SAVE, give it a search name and you'll always be able to call it back up.

Customize Columns



- 1 **Customize Columns** - Select to open up your column customization. This will allow you to customize what you see ONSCREEN!
- 2 **Column Summary** - As you make column selections, they will show up here to give you a summary of your selection.
- 3 **Available Columns** - Select the Add to move to the right.
- 4 **Drop & Drag** - Simply select the column and drop it where you would like it to show on screen.
- 5 **Done!** - Select Done to apply your updates and show on screen.
- 6 **Save** - Is this search going to be used again? Select SAVE, give it a search name and you'll always be able to call it back up.



[Customize, Customize, Customize](#)

Tutorial



[Customize and Save your View](#)

Tutorial

Account Admin - Member How To



- 1 Member** - You'll see all member names right here. Green means the current member showing. Select Add New Member to add new.
- 2 Member Information** - Fill in all information that is required and any additional. Select Build Swimmer ID to automatically apply the USA ID# based on First, Last, MI and DOB or enter it in manually. This number will connect all times to them historically (if they exist) and going forward.
- 3 Groups** - All groups here are critical to your member database. Your roster is the swimming level (gold, silver, etc), Location is not required but can be used if you have multiple locations. Good for an additional filter. Billing Group (for teams that use our billing system) is how much the athlete pays and subbilling is how often.
- 4 Edit Groups** - Simply select the cog to the right. You can add, edit or delete any group.
- 5 Attendance Report Tab** - Once you take attendance using our [OnDeck Coach](#) Mobile App it will appear in this tab.
- 6 Attendance Edit** - You can edit attendance and Individual Text Notes once they have been taken in [OnDeck](#). All edits done on SwimOffice will sync back to OnDeck.

Edit Members

Samantha Allen

Account Info **Members** Payment Setup Membership Dues Schedule Swim Lessons

Samantha Jan Add New Member 1

 **Samantha Allen**
15 Female  2014-09-11
Upload Image Delete Image

Drag an image anywhere in this window to upload

Member Information 2 Attendance Report

Legal First Name: * Samantha Middle Name: C Legal Last Name: * Allen

Preferred First Name: Sam Gender: * Female Email:

Phone: 976-3311 SMS: Carrier: None Birthday: * 05/21/1999

High School Name: ID Card #: 052199SAMCALLE Build Swimmer ID Merge ID

Apparel Sizing **Important Dates** **Roster | Location | Billing Setup**

Swimsuit Size: 26 Date Joined: * 12/17/2012 Roster: Bronze

Shirt Size: L Inactive Date: Location: Bachelor Pool

Warm-up Jacket Size: XL Attach Date: Billing Group: * Gold

Warm-up Pant Size: L Racing Start Certified Date: 09/26/2014 Sub Billing Group: * Monthly

Member Status: * Active

Attendance Report 5

Beginning Date: 09/08/2014 End Date: 10/08/2014

Q Search Print

Workout Date/Time	Attended	Practice Distance	Distance Credit	Individual Voice Note	Individual Text Note	Workout Voice Note	Workout Text Note
09/30/2014	Full	0	0.0		Lift your elbow		
Summary	1.00	0	0				

Edit Attendance Type: Out 1/4 1/2 3/4 Full Excused



Tutorial

[Member Overview](#)


Tutorial

[Managing Your Groups](#)


Tutorial

[Lifecycle of Attendance](#)

Account Admin - Saved Views & Account How To

1 **Saved Views** - Saved views will make all of your jobs easier. Once you have your screen customized select either the Save or the Saved Views.

2 **Selected Filter Status** - You can always look here to see exactly what you are filtering on.

3 **Save View Field** - Enter in a name for your saved view and Save!

4 **Default** - Select 'Make Default' at any time to make this your default view even on login.

5 **Done** - Once you have made your adjustments in this view, make sure you select Done to apply.

1 **USA Swimming Registration** - This tab gives you all necessary functionality to generate your USA Registration Packages.

2 **Multi - Edit** - USA reg packages have several fields. Select one, many or all and multi edit to quickly update as many fields as necessary.

3 **Package Generations** - Select Generate Reg Package to generate your electronic USA Reg package. Select USA Swimming Form to generate the hard copy. Your LSC will let you know which one is required. Select and follow the prompts.

4 **Archive Reg Files** - Once you have generated any of the packages above, you can locate them again for download under this selection.

Account Management

Need Help ?
Keyboard shortcuts guide: Shift + ?
Account/Member Admin Overview

Accounts Members **USA Swimming Registration**

+ Add Account

Current View: Unserved View - Save Customize Filters Customize Columns **Saved Views** 1

Selected Filters: Account Status: Active | Billing Group: Bronze, Gold, Silver | Pay Method: CreditCard

Save your new custom view!

All row filters and columns will be saved with your view. You can then set a default view from your list of saved views.

Done 5

Default View:

Example 1: Active Default
Account Address
Information sorted BY
LAST IN Column View

3 Outstanding Balance Save View

Your Saved Views:

Example 2: Active 4 Make Default ✖
Account Address
Information View

Account Management

Need Help ?
Keyboard shortcuts guide: Shift + ?
Account/Member Admin Overview

Accounts Members **USA Swimming Registration**

67 Members (3 selected)

Current View: Unserved View - Save Customize Filters Customize Columns Saved Views

Edit Communicate Export Archived Reg Files 4 Search for members Q

Edit Members
Multi-Edit 2
Rebuild ID#

Custom Excel Export
Generate Reg Package 3
USA Swimming Form

name	name	R	Status	Custom	LastReg Gen'd	Member Status	Roster	Last Conf
Allen	Samantha	New	Year Round	052100SAMCZALL	11/7/14	Active	High School	10/1
Allen	Jan	New	Year Round	022002JANJALLE	11/7/14	Active	Bronze 2	10/1
Andrews	Mary	New	Year Round	103003MAREANDR	11/6/14	Active	Bronze 2	10/1



[USA Registration Overview](#)

What's COOL

iPad

MOBILE! We love mobile and this interface is magical on Mobile! Take a look at how an iPad and an iPhone look! All of the functionality on the go. Easy to navigate. Easy to Edit. Fast and Responsive.

Responsive Website Design! - What does this mean? It means easy reading and navigation with a minimum of resizing, panning and scrolling across a wide range of devices. Basically it will adapt to your viewing environment fluidly. This is what allows easy navigation across a broad range of devices. Try grabbing a corner and resizing your site. Watch as it adjusts to you.

Shortcut Keys! Select shift ? to bring up our huge selection of keyboard shortcuts. Not only is this incredibly optimized for speed and efficiency, never take your hands off of the keyboard. Now that's FAST!



Tips & Tricks

Keyboard Shortcuts		
j	Move row selector down (highlighted)	k Move row selector up
a	Select all rows	e Edit selected rows
m	Email selected rows	/ Focus on text search box
n	Edit next checked row	p Edit previous checked row
c	Open "Customize Columns" menu	f Open "Customize Filters" menu
v	Open "Saved Views" menu	d Close Customize Dropdowns (filters, columns, views)
x	Check highlighted row	esc Exit expanded screen mode

iPhone