

# Class and Course Providers

## Buyer's Guide

**loveadmin**  
moving your organisation forward



# Introduction

When you start looking for the right admin and payment software for your organisation, it's important to think about the functionality you'll need to manage your people efficiently.

Many of the features and tools you'll eventually need might not be obvious at the outset, so we've put together a list of things to look out for. Even though you probably won't need everything on the list, the majority of them will apply.





# The easier way to manage your timetables, schedules and bookings

"I'd thoroughly recommend this to any other club out there as a first class 21st century admin tool. Making use of the product has been one of the best decisions we have ever made."

**Valley's Gymnastics Club**





## Classes, courses and holiday camps

Our calendar booking feature allows you to set up, promote and accept bookings quickly and easily online. Booking scenarios include, but are not limited to:

- One-off sessions
- Same time every week for a term
- Booking as many sessions as they like within a week, month or across a schedule (for example, 12-week blocks)

You can also set the system to limit class capacity by number of attendees or age.

## Merchandise

If you sell merchandise, it's easy to add them, along with pictures of your products, to your online store and keep track of stock.

## Membership

If you charge a membership fee – whether paid at one fixed point in the year, on a rolling basis, or by instalments – we make sure you collect your payments on time, every time.

## Facility and equipment hire

If you've got rooms, equipment or anything else your customers can hire, they can make their booking via their online account, quickly and easily.

## Tickets

Got an event coming up? Promote it to your customers via our communication tools and sell your tickets fast online.

## Automatic trial management

When a person registers for a trial, the system can:

- Send an automatic pre-trial notification to reduce the chance of no-shows
- Send an automatic post trial follow-up message, giving the option to accept or decline the space. If they accept, they will receive an invoice for payment. If they decline, they can receive a questionnaire so you can analyse why people are not converting

## Automatic waiting list management

To help you reduce admin, when a space becomes available, you can choose from these automated waiting list invite options:

- First in, first out
  - Related parties (typically siblings first)
  - First come, first served – broadcast to all
- If a person declines the space or doesn't respond in time, the system will invite the next person. On acceptance, the system can raise an invoice for payment.



## Renewals

At the start of each billing period (i.e. term), the system can do the heavy lifting for you. Choose to automate the renewals and the system will send out invitations for customers to renew. It will even automatically invite people to renew to the correct age groups, e.g. identifying moving someone up from 'Age 6-7' to 'Age 8-9'. If people choose to renew, an invoice is raised. If they decline, they can be sent a survey to analyse the reasons why people are leaving.

## New registrations

When your organisation creates an account with LoveAdmin, you'll get an online shop so new customers can easily sign-up and buy anything else you want to sell. The system can validate registrations based on age so people always attend the correct classes. You can choose to accept payment at the point of registration or approve people first. And you can create custom forms so it's easy to collect information from new customers.

## Product relationships

If your organisation requires people to purchase multiple items when they join or renew, you can simply create rules within the system that enforces that during the check-out process.

You can also set the system up to recommend other product purchases. For example, "Buy a club t-shirt with your membership".

## Instalments

You can set a maximum number of instalments, allow people to set payment dates, and define when you want payments to clear by. You can also start and pause payments, and charge an instalment premium.

## Pro-rata pricing

If people join part way through your billing period, the system can automatically pro-rata the pricing for you.

## Reconciliation

As the payments come in, the system reconciles the payments for you.

## Refunds and credits

The sales admin functionality lets you make a refund, or credit an amount to a customer's account that can then be applied on their next purchase.

## Discounts

From sibling to family, multi-purchase to multi-attendance, codes to early bird, we have flexible discount strategies that can be applied at the point of payment.

## Payment methods

Depending on the products you sell, you can choose which payment methods you want to accept. For example, monthly fees to be paid by direct debit and merchandise paid for by card so you get the money quicker.

# Reduce the time you spend managing people

“Renewing the classes is my favourite part of the LoveAdmin software. All the info is there, you can just renew it when it's a new term – and it's all done!”

**Swimplicity**



## Adding contacts

Add contacts to the system individually or import them via a spreadsheet. Types of contacts include:

- **Beneficiaries** – typically, your customers
- **Account owners** – if you have children participating in your activities, the parents will typically be the account owners
- **Coaches/teachers/leaders** – these, and other types of people at your organisation can also be stored on the system

## Forms and fields

When your customers (or their parents) use LoveAdmin, they'll need to set up an account with us. They'll submit name, address and contact information, which we share when they register for your organisation. If you need further info, we give you the option to create custom forms and fields. You can create multiple forms to serve different types of membership. And create forms for storing information about your volunteers, like DBS expiry date, coaching qualifications etc.

## Check availability

Coaches can check the availability of their attendees via their mobiles using the availability tool. As people respond, the system will update the coach with who is and isn't available.

## Record attendance

Keep track of who has and hasn't attended via your mobile. The system will flag if attendees have any medical or payment issues, alerts or declined photography consent. Customers can self check-in with our QR code feature.

## Assign roles and permissions

Storing all your customers' and helpers' information in one place makes it easy to control who has access to what.

For example, give coaches access to those they are responsible for, their schedules (i.e. fixtures, classes etc) and the tools they need to manage them, like the availability checker and attendance register tools.

## Groups

People are grouped together by the products they purchase, for example, a class. If you want to create additional groups of people for any other reason, you can with our group management tool. Once people are added to a group, it's easy to send group communications, apply special discounts and give limited access to products and services. For example, you may only want people in Group A to sign-up for a competition.

## Managing contact data

If you need to mass update or export information, you can do that quickly and easily.

You can also search across all your contacts, using our quick search feature.



# Improve all your communications

“LoveAdmin has made a really positive difference to our organisation and with the excellent support and regular updates and developments, we're excited to carry on using them for years to come.”

**KYDS Youth Drama Society**





## Email

Create professional-looking emails with our drag and drop email editor. Quickly and easily insert text, pictures, videos, columns buttons, HTML code and more.

By default, emails are sent with BCC but if you want to start an email conversations, just select the CC option.

## Email headers and footers

Make sure your emails always stay on brand by creating header and footers that will automatically be inserted into your emails.

## Sending domain

If you have your own domain (e.g. MyOrganisation.com), then you can send emails, via LoveAdmin, from that domain.

## SMS and WhatsApp

Improve engagement by sending SMS and WhatsApp messages. Plus, send messages direct to the customers online account with in-app messaging.

## Timeline

Every customer can access a timeline feature in their online account where they can send messages, pictures and videos.

## Create templates

To save you time, you can create messaging templates that can be used time and time again.

## Scheduling messages

You can choose to send messages now or time them to go out in the future – for example, in the lead up to an event.

## Personalisation

Each message you send can be personalised using the field data you can store on your customer. Personalising messages improves engagement and response rates.

## Attachments

To send attachments, upload your files to the system and link them from your email. By sending just the links, you can use larger files without exceeding email limits.

## Notifications

The system has over 40 notifications that can be triggered by set criteria or system events. For example, if a customer misses three consecutive sessions, you can send an alert, a branded email on their birthday or a reminder leading up to a person's trial.

You can set who you want to receive the notifications and whether you want them sent by email, SMS or WhatsApp.



# Development programmes and award schemes made easy

“Every Monday I would spend at least four hours on admin, now it’s virtually nothing.”

**Casablanca CGT**





## Development programmes and award schemes

### Development Programme / Award Schemes

Create a structured programme of development for your customers (like an award scheme) with our Development Programme functionality.

For each level and skill, you can record that they are working on it, they have completed it, they have achieved it (i.e. been assessed) or not achieved it. As you do, the system will send notifications to the customer's timeline.

### Levels and skills

Each programme consists of levels and skills, and each level typically consists of multiple skills. You can upload images or videos of that skill so when you mark a person as working on a skill, the system can send that image / video to their timeline. For children, this means their parents know what they are working on.

### Practice

For each skill, you can set what people need to practice to achieve it. So, as you mark them as working on a new skill, the system will automatically send their practice schedule with accompanying instructional pictures and videos.

### Achieving and not achieving a skill

When you mark a person as achieving a skill, a notification is sent to their timeline. If they do not achieve a skill, the system can send info of what they need to practice to achieve it next time.

You can set how many skills need to be achieved before passing the level.

### Rewards

You can associate rewards to levels. For example, when a customer passes Level 1, the system can add the cost of the certificate or badge into their check-out for purchase.

### Pre-loaded award schemes

The system comes with the British Gymnastics, Swim England and STA awards schemes pre-loaded for convenience.

# Reporting made easy

“The financial reporting is useful to see our gross and net revenue at a glance. Because of the secure system, we've also moved from one person administering everything to a team of various admin rights, able to share the load.”

**South London Theatre**



**Sales invoice**

See what's been invoiced for a period such as, a week, month or membership year – plus see what's been paid and what's outstanding against those invoices.

**Sales Settlement**

View what funds have been settled to your bank or PayPal account within a specified period of time – for example, last week.

**Pending payments**

See which days direct debit payments will hit your bank account – great for cashflow transparency.

**Refunds**

See the value of the items refunded.

**Sales Tax**

View sales tax liabilities.

**Reconciliation**

Track transactions from the point of payment through to settlement into your bank or PayPal account.

**Payment Disputes**

See transactions that have been disputed by payees.

**Expense report**

View the cost of transactions and staff.

**Best sellers**

View a league table of your best-selling products.

**Age Receivables**

Review outstanding monies by period – for example, how much is outstanding between 60–90 days.

**Communication**

View messages sent, opened, bounced, marked as spam or invalid.

**Registration**

Access recent registrations and purchases by new people joining.

**Availability and attendance**

See who's available and unavailable for future calendar events (like matches), historical attendance details and statistics.

**Product invitations**

See customers that you have sent a product invite too. Typically, this will be class fees at the beginning of the billing period.

**Performance Tracking**

If you have a structured programme of learning, view who is working on and achieved levels and skills.

### Business intelligence

Access insightful reports that identify risk and opportunities for your organisation, including:

- Income analysis
- Retention
- Marketing
- Customer satisfaction
- Coach performance
- Conversion rates
- Engagement rates

### Dashboards

Our dashboards give you a 'live' status of how your organisation is performing across different metrics.

# Giving you the best possible customer service

“You'll never deal with a company whose customer support is as knowledgeable, as friendly or as helpful as the guys here.”

**Peterborough Gymnastics Club**



"Excellent product, and excellent support. Nothing is too much trouble for the team."

**Camp Hill Mini and Junior Rugby Club**

"The support team are a huge breath of fresh air, as is the ease of using the system, and we would recommend LoveAdmin to anyone thinking of using them."

**Culcheth Athletic JFC**

"The advice and support I have received through the setting up, going live and on-going since the introduction of our online payment system has been first class."

**Edinburgh Athletic Club**

"The support I have received has been outstanding."

**Upper Humble Canoe Club**

"The support provided by LoveAdmin is superb – never too busy to help and nothing is too much trouble!"

**Romsey Town Youth FC**



### Security

The LoveAdmin platform is built on AWS Well Architected Framework for industry standard security and data protection. For full details, visit <https://docs.aws.amazon.com/wellarchitected/latest/security-pillar/data-protection.html>

### Payment Partners

To provide you with choice, we work with three leading payment providers – PayPal for card and PayPal Wallet payments, London & Zurich and GoCardless for Direct Debit payment. See details for each provider below...

Details	London & Zurich	GoCardless	Debit / Credit Card	PayPal - not-for-profit rate	PayPal - standard rate
Type of payment	Direct Debit	Direct Debit	Card	Card / PayPal balance	Card / PayPal balance
Settlement time	7 - 11 working days	5 - 7 working days	Instant	Instant	Instant
Settled to	Bank account	Bank account	PayPal account	PayPal account	PayPal account
Setup time	Approx. 5 working days	15 mins	15 mins	15 mins	15 mins
Requirements	Min. 1,200 across 12 months	n/a	n/a	n/a	n/a

Contact us to learn more about the right payment provider for you and details on processing fees.

# Contact us

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