

Adding Students onto SwimSoft

This document will provide you with the knowledge required to add students to SwimSoft.

From the **Main Menu**, you will need to go to **Students** and then **Add** on the secondary menu.

Add Student

Note: You will be made aware of potential duplicates and families with similar surnames after pressing 'Proceed'

First Name

Surname

Date of Birth* e.g. 16 01 2013

* Optional

Proceed

Exit

On this page, simply type the first name and surname of the student you wish to add to the system, the date of birth is optional and will help when requesting reports that require the student's age (Rising Fives etc). Once the details have been filled out, press **Proceed**.

The next stage of the process will check if the client is already on the system or has any close matches, the next page will be dependent on the outcome of this.

If the next page shows you the same name as you have just entered in the database, whether this is a duplicate of the client or not. You can either **Select** that this is a duplicate and the client will not be created again, alternatively, click **No Duplicate - Proceed** and you will continue with the process of adding the client.

The next page will be searching the database for a possible sibling or a family member. If you see a client with the same surname or address in this list, investigate whether the match is correct. If it is, press **Select** next to the relevant client and the student will be added to the existing family **CDS**. If after investigation you find none of the listed clients are related to your new student, press **No Match - Proceed**.

You will next see the page shown below, this is where you add the advanced details for the student through registration forms. Follow the columns from top to bottom and fill out any information you have for the student, if you **Confirm** without filling out a required text box, the system will not allow you to finish the process and will display a message explaining the cause.

Ensure that when adding the guardian of your student that you add in all contact details you have, this means that when you're sending out communications via the system, the parent/guardian will receive the lesson details to their correct email address and will receive any important updates.

The default **Payment Method** will be **Cash/Card/Cheque/Other**, please leave this as the default. If you decide to collect payments by direct debit SwimSoft will automatically update the payment method as soon as the family has signed up to GoCardless. Also, please ensure you leave the **Generate Invoice** as selected; this enables SwimSoft Online to generate an invoice and a communication.

Once completed, press the **Confirm & Open CDS button**. This will take you through to the whole family's **Client Data Sheet** where you can see all family members and contact details you hold against adults. From here, if the family were to come to you and say they have another child they would like to attend swimming lessons with your organisation, you can simply press the **Add Student** button just under the list of names in the **CDS** and follow the process again.

After the adding student process, you will then see the new student's name in the family **CDS**, and you can then use the **Add** button to place them on a course.