

CDS - Overview

The **CDS (Client Data Sheet)** contains whole family information in one place, you can then go into a particular client's sheet to view their individual information. Each client, and then the family, is issued a **SwimSoft Reference**. You can use this reference number to search for the client via the **Students** and **Search** function from the **Main Menu**.

The **CDS** is split into sections and can be navigated around by using the buttons in the left-hand column. The sections include **Family Information, Client Information, Course, Financials, Notes, Waiting List, Awards & Progress, Communications, Membership** and **Client Hub**.

Select a person

Test Family - 100

Mr Bob Morrish - Father
Mrs Marilyn Morrish - Mother

Add Student Add Guardian
Switch Student Inherit Student

Menu - Bob Morrish - 216

Family Information
Client Information
General
Address
Contact
Correspondence
Course
History
Lessons
Add

Financials
Payment Method
Top Up Account
Invoices
Invoice Schedules
Payments
Credits

Notes
General
Health Issues
To Do

Waiting List
Awards & Progress
Communications
Membership
Client Hub

Switch Student
Exit

Info Centre - General Information

Title: Mr
First Name: Bob
Prefers to be called:
Surname: Morrish
Date of Birth: e.g. 16-Jan-2003 [Reset DOB](#)
Age:
Gender: Female Male
Family Role: Father
Membership Type: Standard
Allow Photography:
How Heard? Other:
Third party membership no:

[Store](#)
[Delete](#)

Linked Locations
Brighton [Delete](#)
[Link with current Location](#)

Only personnel with the **'Admin'** status on the system can see a client's CDS, this means that personal data can only be accessed and viewed by authorised staff. You can edit information in the CDS at any time, and if a client makes any changes within their **Client Hub** account, these will be reflected in the **CDS** as well.

The CDS stores all previous and current course information, invoices, communication, awards achieved and any notes that have been added against the client (health issues etc).