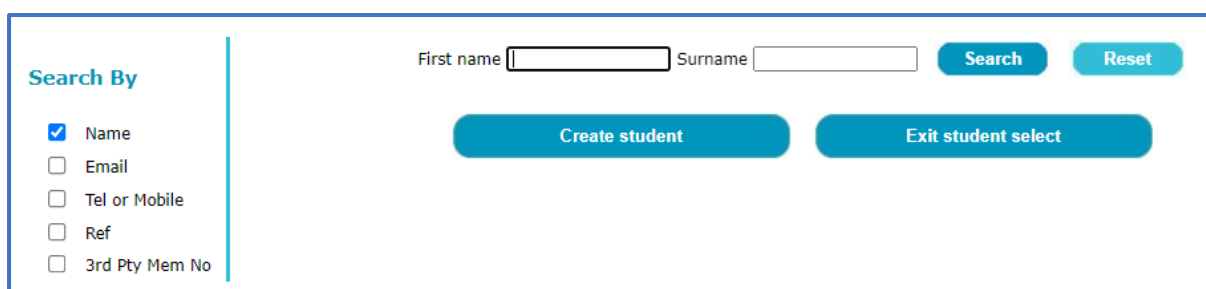


## How to search for students and their parents

To search for a student, their parent, or the whole family on SwimSoft you will need to go to **Students** on the Main Menu and then **Search** on the secondary menu.

Once on this page you will need one of five things, these include:

- Name
- Email Address
- Telephone or Mobile Number
- SwimSoft Reference
- Third Party Membership Number (If you use them)



Depending on which of the five options you select in the left-hand column, the search boxes on the page will change.

For the **Name** option, you can either input just the Surname, just the first name or simply the first few letters of each. To find all family members, search by just the Surname to bring up all registered clients with that name.

The **Email** address search allows you to find all clients with that email address against their CDS, this helps when searching for information relating to a Direct Debit payment where you only have the email.

Searching by **Telephone** or **Mobile** number will display all clients with the relevant phone number listed against their contact details in the CDS, this is helpful when tracing messages or phone calls.

Each individual within SwimSoft has a **Reference** number and you can search by this to avoid confusion with similar names and/or duplicates. You can only search the individual reference numbers and not the Family reference number.

Some organisations use their own **Membership** numbers and so when adding a student to the system, we give the option to add this number into SwimSoft. This way, organisations can search by their own Membership numbers to compare between systems and keep everything organised.

Once you have selected which method you would like to search by, and inputted the relevant information, the system will display any clients that match the search. From this list of clients, you can go into the CDS by pressing the **Select** button to the left of the name. You also have the ability to delete the client from this page by pressing the **Delete** button to the right of the name and then pressing **OK** on the pop-up.