

## Course Information

The **Client Data Sheet** includes the **History** of courses the child has been on within the organisation, the upcoming **lessons** they will be attending and an **Add** button which allows you to place them onto a course in the current Location & Activity directly from the CDS.

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](#)

### Info Centre - Course History

		Term	Course No	Class	Day	Time	Teacher	Status			
<a href="#">Edit</a>	<a href="#">Lessons</a>	<a href="#">Move</a>	<a href="#">New Letter</a>	4-April 2022	790	Stage 1	Wed	10:00 AM	A Sample	Confirmed & Not Required	<a href="#">Delete</a>
<a href="#">Edit</a>	<a href="#">Lessons</a>	<a href="#">Move</a>	<a href="#">New Letter</a>	3-March	640	Stage 1	Wed	12:00 PM	A Sample	Confirmed & Not Required	<a href="#">Delete</a>

The course highlighted in green is the course the client is on in the current Location, Activity and Term. You can see the basic course information including the **Term, Course Number, Class Type, Day & Time, Instructor** and the **status** of their place and invoice.

Pressing the **Delete** button to the right of the course will remove the child from the course and all lessons and cancel any corresponding invoices.

The **Edit** button on the far left of the course will take you through to the following page.

### Info Centre - Course History

Course No 790 Stage 1 Wednesday 10:00 AM Term 4 April 2022 A Sample

Client Status Confirmed Result Unknown Payment Status Not Required

Re-Enrolment Status Unknown No of Terms 0 Previous Course 0

Student - Request To Change

Date

[Done](#) [Delete](#)

Student - On Hold

Date

[Done](#) [Delete](#)

Teacher - Course Comment

Cancel

Store

This page allows you to edit the client's **status**, whether their space is **Confirmed** or **Unconfirmed**, the **Result** of the course (Move and Stay information for the following term) and their **Payment Status**.

The page also allows you to view information like the **Re-enrolment** status, the number of terms the student has been attending lessons and the previous course they were booked onto.

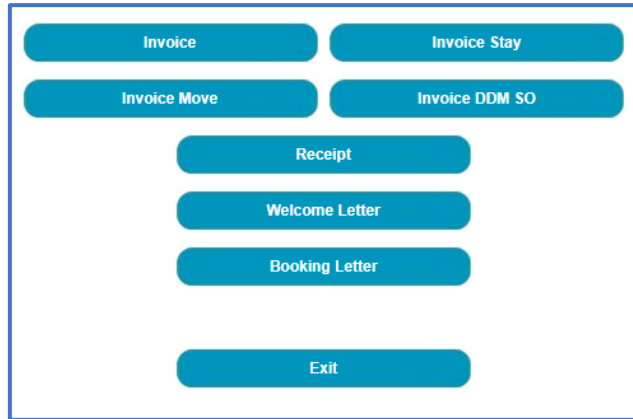
A **Request to Change** is when the student would prefer to attend lessons on a different day or time, and you are not able to accommodate them immediately. The Request to Change note will be flagged up during the Re-enrolment process to see if you can accommodate the student's preferences at this time. To add a Request to Change note, simply type in the text box, add the date, and then press the **Store** button at the bottom of the page. You can mark the note as '**Done**' once complete or '**Delete**' if it becomes irrelevant. Once you have completed a re-enrolment and have fulfilled the Request to Change SwimSoft Online will complete the Request to Change for you, you do not need to mark this done.

The **Lessons** button will show you the lessons the student is booked onto in which course, their Membership Type and Pricing information.

<p><b>Course Details</b></p> <p>Student: Bob Morrish (216)          Term: 4 April 2022          Course No: 790          Class: Stage 1          Day: Wednesday          Time: 10:00 AM          Teacher: A Sample</p>	<p><b>Re-enrolling from course (last term)</b></p> <p><input checked="" type="checkbox"/> CN: 640    Stage 1    Wednesday 12:00 PM    A Sample</p> <p><b>Lessons</b></p> <p><input checked="" type="checkbox"/> 1 Wednesday 06-Apr-2022 10:00 AM 30 mins C-UPd  <input checked="" type="checkbox"/> 2 Wednesday 13-Apr-2022 10:00 AM 30 mins C-UPd  <input checked="" type="checkbox"/> 3 Wednesday 20-Apr-2022 10:00 AM 30 mins C-UPd  <input checked="" type="checkbox"/> 4 Wednesday 27-Apr-2022 10:00 AM 30 mins C-UPd</p> <p><input type="button" value="Select All"/>    <input type="button" value="Deselect All"/></p> <p><input type="button" value="Confirmed"/>    <input type="button" value="Unconfirmed"/></p> <p><input type="button" value="Exit"/></p>	<p><b>Membership Type</b></p> <p>Standard</p> <p><b>Price List</b></p> <p>221, 30 mins          £8.00 per lesson</p> <p><b>Financials</b></p> <p>Amount Due    £32.00</p>
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The **Move** button takes you through the process of moving a student from one course to another once you have already received payment for them.

The **New Letter** button allows you to generate an email with the course information for the client. You can generate any of the following communications; just press the button.



The **Lessons** tab shows you a list of the upcoming lessons. You can see the courses the student is booked onto at the very top of the page and then the lesson details just underneath.

CN: 48470 - Ando Swim Term 103 Stage 2 Mon 10:00 AM Di Reed Main Unconfirmed Allocated  
 CN: 48425 - Ando Swim Term 102 Stage 2 Mon 10:00 AM Di Reed Main Unconfirmed Allocated

### Info Centre - Upcoming Lessons

CN: 48470 Andover Swimming Term 103 Stage 2

22-Aug-2022	10:00 AM	Di Reed	Main Pool Lane 1 - Wall Side 117628
29-Aug-2022	10:00 AM	Di Reed	Main Pool Lane 1 - Wall Side 117628

Pressing the **Add** button will redirect you to the page where you will find a list of all your class types, along with an **Add to Waiting List** button and a **View Spaces** button. Press the **View Spaces** button to then see a list of all the lesson days and times against that class type. You can then add the student to the course you wish by pressing the **Students** button and then **Confirmed**. Press the **Add to Waiting List** to add the student to the relevant class waiting list.