Moving a student who has paid in full and lessons have started

Overview.

If a client needs to change course, they will need to be removed from their current course, credit should be issued for unused lessons (if they have paid), and then placed on a new course. Here are the steps:

1) Go to the client's **CDS**

2) Double check the status of the Invoice and ensure it has the status of '**Paid'**

3) Go to **History**

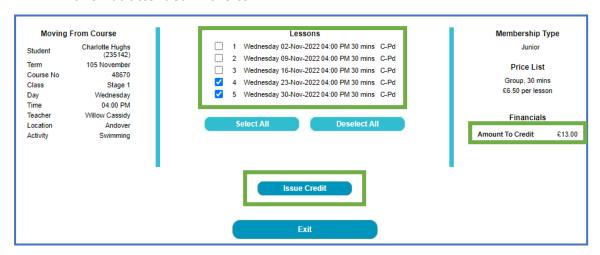4) Press **Move** next to the course the student is currently on

5) The next page is the **Class Type** selection page. Press the **View Spaces** button next to the class type the student is moving to

6) You will then be on the **Place Availability** page. Locate the correct course the student is moving to and press the blue **Students** button.
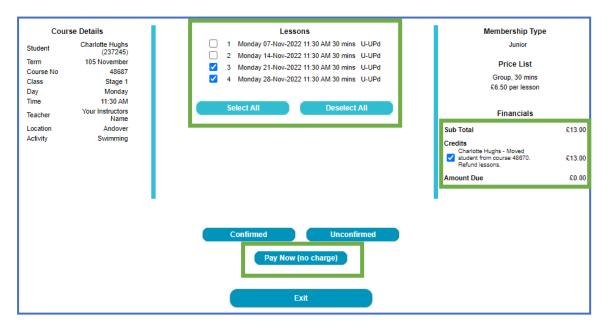
7) The first page you see is relevant to the current course the student is moving from. **Unselect** the lesson(s) that the student **attended**, leaving only the future courses to be credited. Once this step is complete, press the **Issue Credit** button, you can see the **Amount To Credit** in the right-hand column, please ensure this is the correct price for the number of lessons they have not attended in the term.
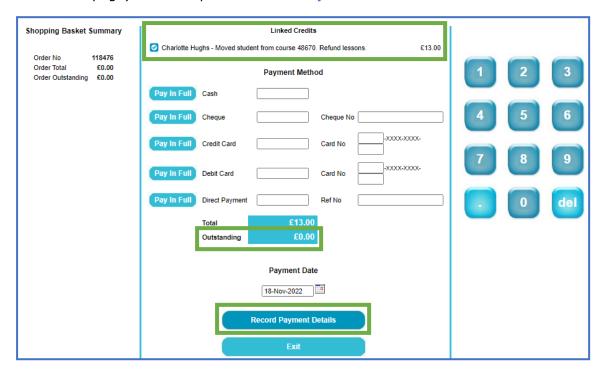

8) The next page is relevant to the new course. You will need to ensure the lessons the student will be **attending on the new course are selected**.

- If the lessons total on the new course is **equal** to the credit issued, you can press **Pay Now (No Charge)** to finish the process.
- If the lessons total on the new course is **less**, there will be a secondary credit created for the excess after pressing **Pay Now (No Charge)**
- If the lessons total is **more** than the credit issued, a new invoice will be created for the remaining amount after you press **Confirmed**. A preview will appear of the new email invoice which you can send out straight away.

9) After pressing **Pay Now (No Charge)** you will be at the **Checkout**. From here, make sure the credit has been applied (you will see this at the top of the page) and then press **Record Payment Details**.

If in the **Checkout**, the **Outstanding** figure is a minus, another credit will be created for the amount still owed to the client.