

## 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**'

Info Centre - Invoices				
	No	Description	Details	Amount
	<a href="#">Create Comm</a> 118112	Charlotte Hughs - CN: 48670; Due: 27-Oct-2022; Term: November		£32.50 Paid

- 3) Go to **History**
- 4) Press **Move** next to the course the student is currently on

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>	105-November	48670	Stage 1	Wed 04:00 PM	Willow Cassidy	Confirmed & Paid

- 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.

Place Availability - All Courses																
<a href="#">Show Family Courses</a>																
Filter summary																
Show 50 entries																
Search: <input type="text"/>																
Location	Students	Day	Time	Class	Teacher	No	Mins	Loc	Act	Term	Section	Notes	Places	Un	Min	Max
All		Mon	12:30	Beginners	Matthew James	48770	30	Worc	Swim	Winter 22	Main Pool - Middle		5	1	3	6
Activity																

- 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.

<p><b>Moving From Course</b></p> <p>Student Charlotte Hughs (235142)          Term 105 November          Course No 48670          Class Stage 1          Day Wednesday          Time 04:00 PM          Teacher Willow Cassidy          Location Andover          Activity Swimming</p>	<p><b>Lessons</b></p> <p><input type="checkbox"/> 1 Wednesday 02-Nov-2022 04:00 PM 30 mins C-Pd  <input type="checkbox"/> 2 Wednesday 09-Nov-2022 04:00 PM 30 mins C-Pd  <input type="checkbox"/> 3 Wednesday 16-Nov-2022 04:00 PM 30 mins C-Pd  <input checked="" type="checkbox"/> 4 Wednesday 23-Nov-2022 04:00 PM 30 mins C-Pd  <input checked="" type="checkbox"/> 5 Wednesday 30-Nov-2022 04:00 PM 30 mins C-Pd</p> <p>Select All    Deselect All</p>	<p><b>Membership Type</b> Junior</p> <p><b>Price List</b> Group, 30 mins £6.50 per lesson</p> <p><b>Financials</b> <b>Amount To Credit</b> £13.00</p>
<p><b>Issue Credit</b></p> <p><b>Exit</b></p>		

- 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**.

<p><b>Course Details</b></p> <p>Student Charlotte Hughs (237245)          Term 105 November          Course No 48687          Class Stage 1          Day Monday          Time 11:30 AM          Teacher Your Instructors Name          Location Andover          Activity Swimming</p>	<p><b>Lessons</b></p> <p><input type="checkbox"/> 1 Monday 07-Nov-2022 11:30 AM 30 mins U-UPd  <input type="checkbox"/> 2 Monday 14-Nov-2022 11:30 AM 30 mins U-UPd  <input checked="" type="checkbox"/> 3 Monday 21-Nov-2022 11:30 AM 30 mins U-UPd  <input checked="" type="checkbox"/> 4 Monday 28-Nov-2022 11:30 AM 30 mins U-UPd</p> <p>Select All    Deselect All</p>	<p><b>Membership Type</b> Junior</p> <p><b>Price List</b> Group, 30 mins £6.50 per lesson</p> <p><b>Financials</b></p> <p><b>Sub Total</b> £13.00</p> <p><b>Credits</b>  <input checked="" type="checkbox"/> Charlotte Hughs - Moved student from course 48670. Refund lessons. £13.00</p> <p><b>Amount Due</b> £0.00</p>
<p>Confirmed    Unconfirmed</p> <p><b>Pay Now (no charge)</b></p> <p><b>Exit</b></p>		

- 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**.

The screenshot displays the checkout interface. On the left, the 'Shopping Basket Summary' shows: Order No 118476, Order Total £0.00, and Order Outstanding £0.00. The main area is titled 'Linked Credits' and shows a credit for 'Charlotte Hughs - Moved student from course 48670. Refund lessons.' for £13.00. Below this is the 'Payment Method' section with options: Cash, Cheque, Credit Card, Debit Card, and Direct Payment. Each option has a 'Pay In Full' button and input fields for card numbers or reference numbers. A summary table shows 'Total' as £13.00 and 'Outstanding' as £0.00. The 'Payment Date' is set to 18-Nov-2022. At the bottom, there are buttons for 'Record Payment Details' and 'Exit'. A numeric keypad is located on the right side of the interface.

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