

## Moving a student after requesting a Direct Debit payment

If you have placed a client on a course and requested payment by direct debit, but the funds have yet to be collected you can use the following procedure to move the client.

If lessons have not started and the price for each course is the same:

1. Go to the current course (**CDS – History – Delete**)
2. Next, place the client on the new course using the **Add** button in the left-hand column of the **CDS**.
3. In the **Invoices** page of the **CDS** you will see the previous courses invoice which is **Cancelled** and the new courses invoice which is **Outstanding**.
4. Copy the **PM Ref** (Reference starting with PM... attached to the invoice) from the **Cancelled** invoice and take note of the **Invoice Number**.
5. Press **Manage Invoices** at the bottom of the page, locate the new Invoice or search via the **Order No** search bar.
6. Press the **Edit** button found at the far right of the order and paste the **PM Ref** into the **GC Ref** box before pressing **Store**.
7. You will be taken back to the **Current Orders** page; press **Exit** to return to the **Invoices** page of the CDS.
8. You will see the new courses invoice now has the PM Ref attached and is marked as **Allocated**.
9. Keep an eye on the **Synchronise Collections Manually** page for the payment to come in, this is found under the **DDM Management** menu on the **Main Menu**.

**For more information on the Synchronise Collections Manually page please follow the link below.**

[https://morleisure.co.uk/portal/help/MS3LR\\_GCPayments.asp.pdf](https://morleisure.co.uk/portal/help/MS3LR_GCPayments.asp.pdf)

- **If the price of the new course is LESS than the original, a credit will be created once the payment has come through.**
- **If the price of the new course is MORE than the original, you will need to collect the remaining balance via BACS or Cash. It is not possible to collect part-paid invoices via DD.**