Chasing late payments

Occasionally, when collecting payments for course fees, you will have a few clients for who you haven't received the money on time. You can chase these payments in a few different ways, from sending a group action email, to sending a reminder invoice.

In this document we will give you the knowledge you need to efficiently contact all clients with outstanding invoices, so you are always up to date with collections.

To begin, you will want to know exactly how many students you haven't received payment for, to do this you will need to go to **Financials** on the Main Menu and then **Client Orders V3** on the sub-menu.

Once the page is displayed you will need to add the **From Date**, which is the date you set as your **payment required by date**, you can find this by going to **Activity Configuration** and **Terms**. The **To Date** can be today's date and press **Search**. You will be presented with a list of students booked on to your current term. The column on the far right of the page will display a box per invoice and the status of their invoice shows in said box.

PP - Part Paid (the client has paid part of the outstanding balance)

O - Outstanding (the client has not made any contribution towards the payment)

NA - Not Applicable (the student pay's by direct debit and the fee has not yet been collected)

P - Paid (the full balance of the invoice has been received)

You will need to use the **Payment Status** filter in the left-hand column and select the **Outstanding option**. This page will now show you all the clients who you haven't yet received payments for in the current term. You can use the **Group Action** button on this page, found at the bottom of the filters list, and select the **Send Email** option to free type an email to send out to all these clients.

If you wish to send out a reminder invoice to the clients who have outstanding payments, you will need to go to **Client Communication** on the Main Menu and then **Review Communication** on the sub-menu.

Choose the communication type you wish to send first. If you have some clients who pay via direct debit and some who pay directly via cash or bank transfer, you will need to generate their invoices separately.

For clients paying via direct debit, you will need to select the **Invoice DD SO** communication type and then press **Apply**. Set the **From date** at the top of the page to **today's date** and then press **Search**. Using the filters on the left-hand side of the page, select the **Outstanding** option for **Payment Status** and the **Direct Debit** option for **Payment Method**.

You will now be presented with a list of your clients that pay via direct debit and have an outstanding invoice. To generate the reminder invoices, press the **Message All Students** button at the bottom of the page and follow further instructions.

Once this process has been completed, the new invoices will be on the **Manage Communications** page waiting to be sent.

For Invoices and Invoice Stays/Moves, you can repeat the process as above, by selecting the Cash/Cheque/Card/Other option in the Payment Method filter.