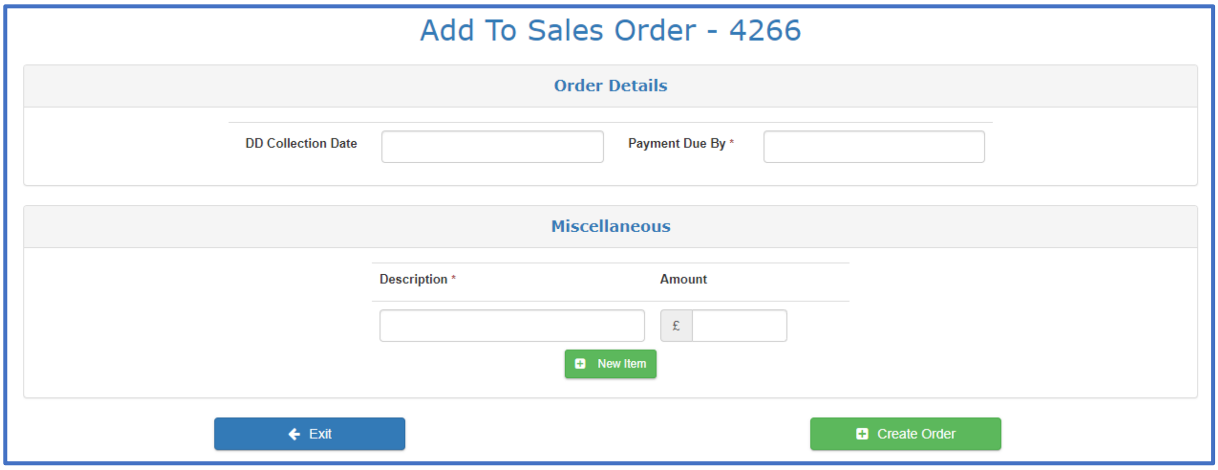
Creating a one-off invoice

Creating an order for an individual client

If you want to create a standalone bill or invoice, you can do this by simply going to the appropriate student's Client Data Sheet. Once in the **CDS**, you will need to be in the **Invoices** section and then press the **Create Invoice** button.



You will need to fill in all the relevant boxes on this page. If the client pays via direct debit, you will need to specify the date you wish for this payment to be collected, the **payment due by** date is for all orders and this is the date you require the invoice to be paid off by.

The **description** of the order will help you keep track of the invoices, for example, the client could have requested a swimming cap and so you would describe the item in this box.

Finally, specify the **amount** for the order. You do not need to input the currency in this box, just the value of payment in numbers, the system will automatically convert this into an invoice with the currency used by your organisation.

If you wish to add multiple items to one invoice, press the green **New Item** button and repeat the process as required.

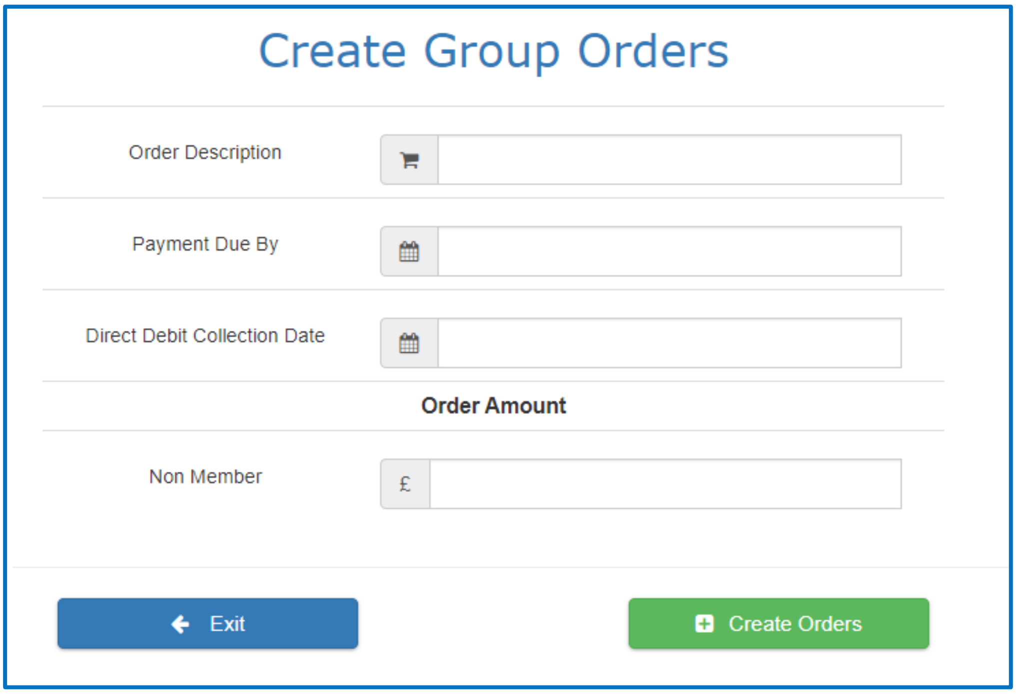
Once your order is complete, press the **Create Order** button.

You will be returned to the **Invoices** page where you will see the order you have just created. If you require an Invoice email to send out to the client, simply press the **Create Comm** button next to the order. You will be taken to the **email preview** page where you can see and alter the information that will be sent to the client, press the green **Send** button on this page if you are happy with the content of the email.

Creating an order for a group of clients

Start on the **Main Menu** and press **Courses** and then **Search** on the **sub-menu**. Use the filters on the left-hand side of the page to refine your search for students you wish to create the order for (a specific day or teacher). Once you have a list of the students you wish to create the one-off invoice for, press the **Group Actions** button and select the **Create Order** option.

You will see a list of the students' names, here you can untick anyone you wish to exclude, you can press the green **Create Order** button at the bottom of the page once the list is correct. A pop-up will confirm the number of students you are performing the **Group Action** for, press **OK** to confirm.



You will need to fill out the boxes provided above. As we are creating an order for multiple students at once, you will need to specify the amount you wish to charge students with each **Membership Type** you have on your system.

Once happy with the inputted information, press the **Create Orders** button. The invoices will now show in the student's **CDS** on the **Invoices** page.