Create Monthly Orders

When generating orders based on students' booked lessons within a selected month, it's **crucial that all setup elements are accurate and complete**. The system relies on this information to calculate charges correctly and issue accurate invoices. Please follow the checklist below to ensure everything is in place **before** creating orders:

☑ 1. Students Must Be Booked onto the Correct Lessons

- Ensure students are enrolled in the correct courses for the selected period.
- Confirm start and end dates of each course booking align with the intended billing period.
- Ensure no students are missing from courses or booked onto incorrect sessions.

☑ 2. Price Matrix Must Be Accurate for All Membership Types

- Review the price matrix for **each membership type** in use.
- Confirm that all applicable lesson types, durations, and frequencies have the correct pricing applied.
- Ensure discounts or special rates are accurately represented where applicable.

☑ 3. Term Dates and Course Days Must Be Set Correctly

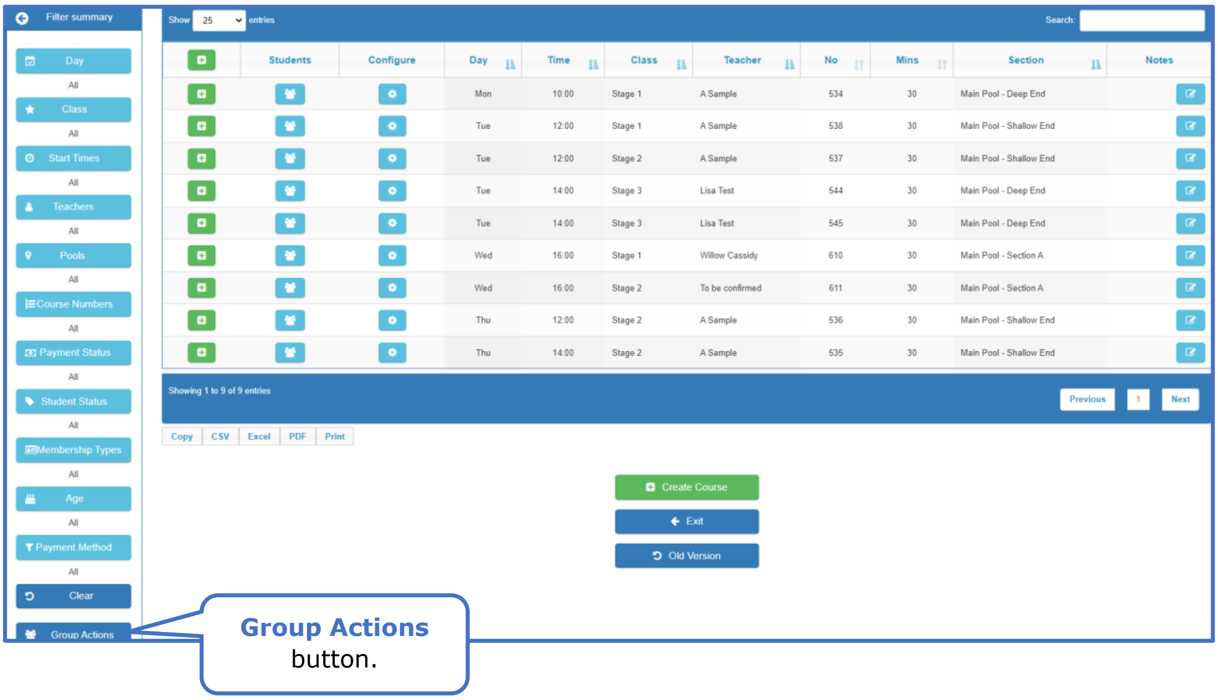
- The system calculates charges based on **active course days** within the selected month.
- Ensure **term dates** are correct, as these define which course days fall into each invoicing period.
- Confirm any **planned closures or non-teaching days** are properly excluded.

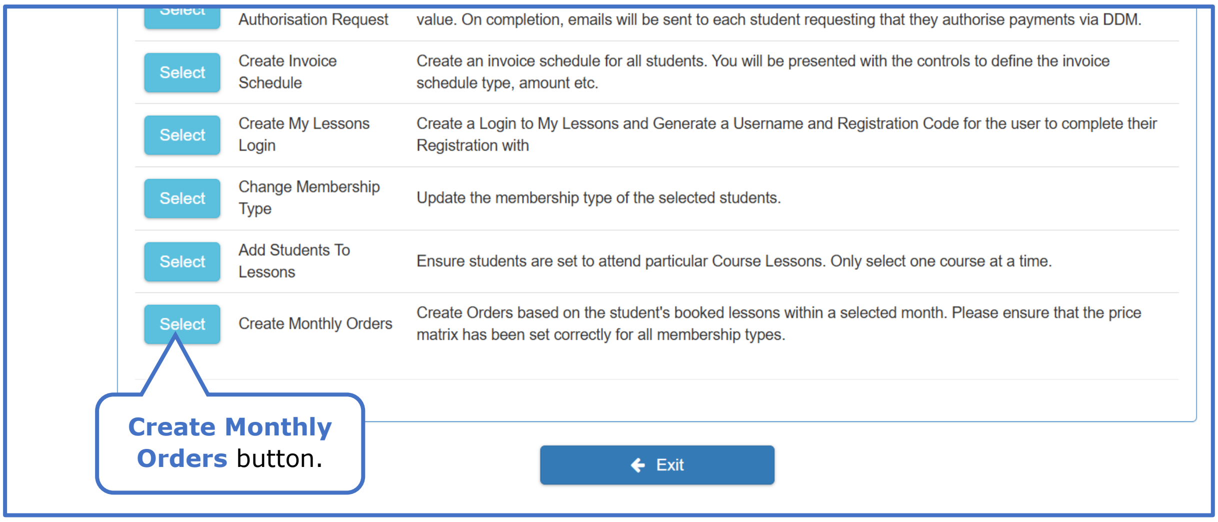
⚠ **Important Note:** If any of the above elements are incorrect, the system will generate inaccurate orders, leading to potential billing issues and manual corrections. Taking a few extra minutes to verify these settings will save time and confusion later.

Once you're happy with all your checks and you are ready to start the process, head to either Courses – Search or Financials – Client Orders V3.

Make sure to apply any filters you require. If using the Client Orders V3 page, the From date at the top needs to be the collection date of the orders you wish to create.

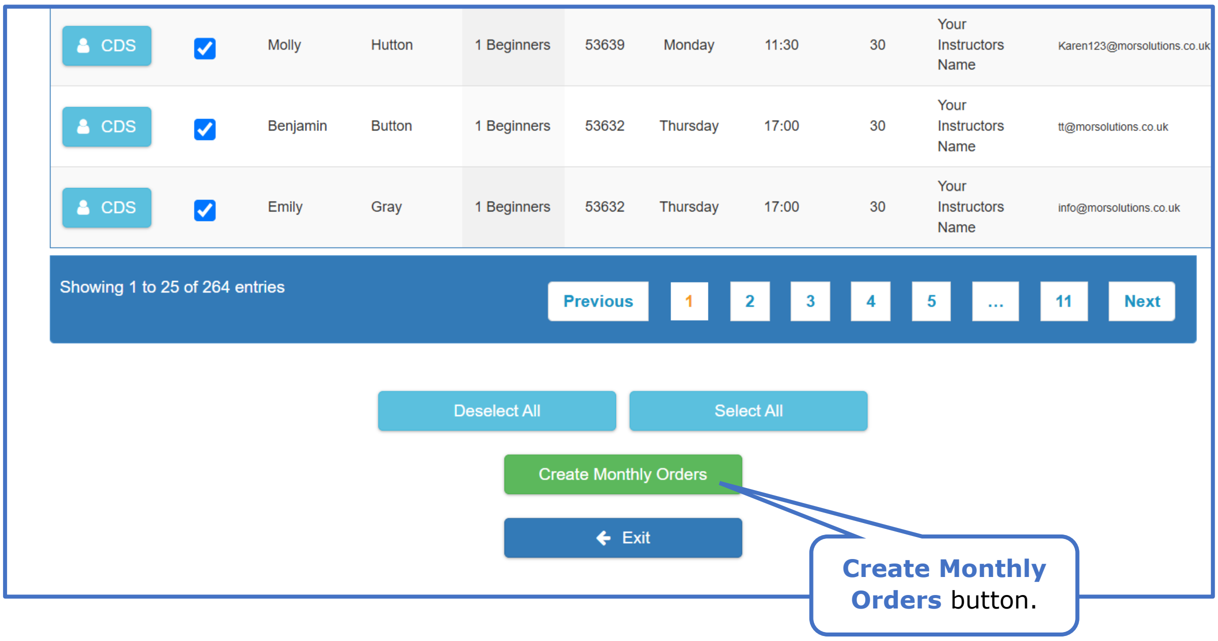
Once all filters are added, press the Group Actions button at the bottom of the filter menu. Scroll to the bottom of the list and press Select next to Create Monthly Orders.





After pressing the Create Monthly Orders button, you will be presented with a list of students who will be included in the Group Action. At this point, you can exclude any students whom you don’t want to be included by searching for them, then unselecting them.

Once you're content with the selection, press the Create Monthly Orders button at the bottom of the page.



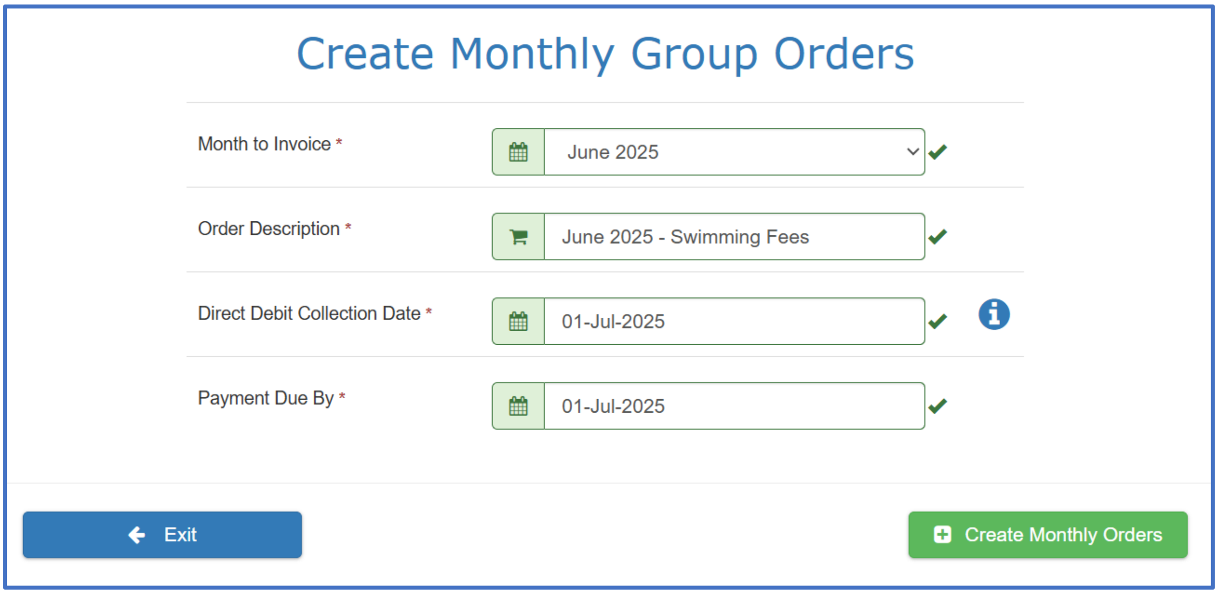
A pop-up will appear, which will show you how many students will be included in the Group Action, press OK.

On the next page, you will have to configure the details for the Group Action. The Month to Invoice drop-down is populated by your term dates, select the month you want to create orders for.

The Order Description will automatically pre-fill for you; you can replace this with whatever you wish.

Finally, select the Direct Debit Collection Date, which is the date you want the money to be collected from the client via GoCardless.

Once everything is filled in, press Create Monthly Orders.



The process page will appear; this will show you what order of the total amount is being created.

Once the process is complete, the page will say so. You can return to the Client Orders V3 page, double-check orders, before sending out your Invoice emails and/or Direct Debits.