

Placing a student onto a course

There are multiple ways to place a student on a course, this document will explain the processes involved in doing so.

Option 1 – Place Availability

The first way to place a student onto a course is to find the course the student would like to attend and then see what lesson time would best suit their needs that has available spaces, do this by going to **Courses** on the **Main Menu** and then **Place Availability**.

The first page you will see has a list of all your class types, **select** the class type you would like to view course details for (you can select multiple types if you are searching for more than one student at a time e.g., Siblings) and then press the **Apply** button at the bottom of the page.

Once you are presented with a list of all the courses with that class type, use the **filters** on the left of the page to refine your search, for example, if the guardian has asked for a Monday lesson, use the **Day** filter and set it to **Monday**.

The **Places** column on the right-hand side of the page tells you the number of available spaces on the course at that time. Once you have found the course you wish to book the child onto, press the blue **Students** button which will direct you to the **Edit Course Attendees** page.

	First name	Surname	Move or Stay	Class	
+	1 Oli	Brown	Staying	Stage 1	<input type="checkbox"/> CDS Add Award Delete
+	2 Brad	Contibob	Staying	Stage 1	<input type="checkbox"/> CDS Add Award Delete
+	3 Molly	Ridge	Staying	Stage 1	<input type="checkbox"/> CDS Add Award Delete
+	4 Tom	Ridge	Staying	Stage 1	<input type="checkbox"/> CDS Add Award Delete

Selection Processing

Course documents Show all awards Hide all awards

Mark All As Staying Mark All As Moving Up Mark All As Moving Down

Store details Add new student Exit course attendees

The **Edit Course Attendees** page will look like the one above, to add a new student to the course, press the **Add New Student** button.

Search By

- Name
- Email
- Tel or Mobile
- Ref
- 3rd Pty Mem No

First name Surname Search Reset

Create student Exit student select

Using the student search aspect of the system, use one of the five options in the left-hand column of the page to find the student, and then press the **Select** button to the left of their name.

You will then be taken to a page that displays the **Course Details, Lessons** and **Membership Type**, and therefore billing details. Using the tick boxes, select the lessons that you wish to book the student onto, and when complete, press the **Confirmed** button. If the parent/guardian has not said they want a place on this course for definite, you can press the **Unconfirmed** button which acts as a place holder for the student, this does not create any communications until you have confirmed with the adult that the child will be attending at this day and time. If you have already received the money for the student's place on the course, you can pay off the created invoice immediately by pressing the **Pay Now** button.

You have now successfully placed a student onto a course, relevant email communications will have been generated in the background and will be ready to send from the **Manage Communications** page.

Option 2 – Courses

The second way to add a student to a course is very similar to the previous process, but instead of going to **Place Availability** on the secondary menu, you go to **Search**.

From here you can simply find the course you wish to book the student onto and press the blue **Students** button as before. The process after this is exactly as above.

Option 3 - CDS

The third and final way to add a student to a course is through the **Client Data Sheet**. First, go to **Students** and **Search** on the Main Menu and search for the relevant student using one of the five options displayed on the left, press the **Select** button next to the student's name.

Once in the **CDS**, press the blue **Add** button in the left-hand column under **Course History**, find the desired class type, and press **View Spaces** in line with it. Then, as before, press the blue **Students** button and follow the process of **Option 1** from the **Edit Course Attendees** page.