

## Placing students and creating an order

This document will explain the process of placing a student on a course, creating an order, and showing the invoice communication that is generated.

To begin, go to the students Client Data Sheet, by pressing **Students** and **Search**. The next step is to add them to a course, press the blue **Add** button in the left-hand column just under the **Course** – **History** section.

After pressing the **Add** button, choose the course you wish to place the student on and press the **View Spaces** button on the right-hand side of the page. You will be presented with a list of courses for that class type, find the course with a day and time that suits your client the best, and press the **Students** button to proceed to the next step.

Course Details           Student         Willow Cassidy (585)           Term         4 April 2022           Course No         794           Class         Stage 1           Day         Wednesday           Time         12 00 PM	Lessons          1       Wednesday 06-Apr-2022 12:00 PM 30 mins       U-UPd         2       Wednesday 13-Apr-2022 12:00 PM 30 mins       U-UPd         3       Wednesday 20-Apr-2022 12:00 PM 30 mins       U-UPd         ✓       4       Wednesday 27-Apr-2022 12:00 PM 30 mins       U-UPd         Select All       Deselect All	Membership Type Standard Price List Group Lessons, 30 mins £10.00 per lesson	
Teacher A Sample	DESCRUTAI	Financials Sub Total Credits Payment on 12 Jan 2022. Amount Due	£10.00 £2.00 £8.00
	Confirmed Unconfirmed Pay Now Exit		

The system will automatically select the lessons that the child is able to attend based on today's date. The system will automatically create an invoice for this if you have Create Orders turned on for the Location and Activity you are in. Any credits against the student will be applied to this order automatically, press the **Confirmed** button if you are sure the client would like this place, **Unconfirmed** if you're waiting to hear back from them, and if you have the payment already you can press the **Pay Now** button to confirm the space and pay off the invoice immediately.

After selecting one of the three options, you will be taken back to the CDS where you will be able to view the order by pressing **Invoices** in the left-hand column.

Info Centre - Invoices						
Θ	No	Description	Details	Amount		
Create Comm 4264	Comm 4264	Willow Cassidy - CN: 794; Due: 25-Mar-2022; Term: April 2	022	£10.00 Outstanding		
		Swimming Original - April 2022 - Stage 1 - A Sample - CN: 794	£0.00	Outstanding		
		Lesson 4 - Wednesday 27-Apr-2022 - 12:00:00 PM - 30 mins	£10.00	Outstanding		
		Overpayment on 12 Jan 2022. Payment ref - 965	-£2.00	Outstanding		
		Credit - Overpayment on 12 Jan 2022. Payment ref - 965		-£2.00 Available		



If you have the Invoice template configured under **Client Communication** and then **Activity Communication**, the system will have generated an invoice email for you to send out to your client. You will find the email under **Client Communication** and **Manage Communications**.

	Sen	d In	voice Email
rom			Amend Template
ō			La CDS
Subject Support System - Invoice for Willow			
	Normal     Font     Size     A -       Ocated Willow a place on the Stage 1 course running       21. The actual lesson dates are detailed below.		esday at 12:00 PM with A Sample. Lessons will take place in Whole Studio of
	Product		
Swimming	Swimming Original - April 2022 - Stage 1 - A Sample - CN: 794		
Lesson 4 - Wednesday 27-Apr-2022 - 12:00:00 PM - 30 mins		£10.00	
Overpayme	nt on 12 Jan 2022. Payment ref - 965	-£2.00	
Overpayme	nt on 12 Jan 2022. Payment ref - 965	-£2.00	😤 🔮
	nt on 12 Jan 2022. Payment ref - 965	-£2.00	Sinsert Attachment
body p	nt on 12 Jan 2022. Payment ref - 965	-£2.00	See Consert Attachment
body p	nt on 12 Jan 2022. Payment ref - 965	-£2.00	S Insert Attachment

You can make changes to this student's email by simply typing in the email body, alternatively, you can edit the entire invoice template by pressing the **Amend Template** button at the top right of the page.