

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	Lessons	Membership Type
Student Willow Cassidy (585) Term 4 April 2022 Course No 794 Class Stage 1 Day Wednesday Time 12:00 PM Teacher A Sample	<input type="checkbox"/> 1 Wednesday 06-Apr-2022 12:00 PM 30 mins U-UPd <input type="checkbox"/> 2 Wednesday 13-Apr-2022 12:00 PM 30 mins U-UPd <input type="checkbox"/> 3 Wednesday 20-Apr-2022 12:00 PM 30 mins U-UPd <input checked="" type="checkbox"/> 4 Wednesday 27-Apr-2022 12:00 PM 30 mins U-UPd	Standard Price List Group Lessons, 30 mins £10.00 per lesson
	<input type="button" value="Select All"/> <input type="button" value="Deselect All"/>	Financials Sub Total £10.00 Credits <input checked="" type="checkbox"/> Overpayment on 12 Jan 2022. Payment ref - 965 £2.00 Amount Due £8.00
	<input type="button" value="Confirmed"/> <input type="button" value="Unconfirmed"/>	
	<input type="button" value="Pay Now"/>	
	<input type="button" value="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				
	No	Description	Details	Amount
<input type="button" value="Create Comm"/>	4264	Willow Cassidy - CN: 794; Due: 25-Mar-2022; Term: April 2022		£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

