

## Synchronise Collections Manually

### Overview

Collections will be present on the Synchronise Collections Manually page if SwimSoft does not have all the relevant information to automatically allocate the payments to outstanding orders in the system. The page allows users to manually match up payments from GoCardless to orders within SwimSoft.

The Synchronise Collections Manually page is split into two sections; the information we have been given from GoCardless, and the information that we have stored in SwimSoft.

	GC Payment	GC Description	GC Amount
1	PMI	- Lesson 1 - Friday 29-Apr-2022 - 06:45:00 PM - 30 mins - SO Ref: 38277	£40.50
2	PMI	- Lesson 1 - Saturday 30-Apr-2022 - 04:20:00 PM - 30 mins - SO Ref: 38275	£40.50
3	PM	- Lesson 1 - Saturday 30-Apr-2022 - 05:15:00 PM - 30 mins - SO Ref: 38257	£40.50
4	PMI	- Lesson 1 - Saturday 30-Apr-2022 - 05:50:00 PM - 30 mins - SO Ref: 37805	£40.50
5	PMI	- Lesson 1 - Saturday 30-Apr-2022 - 05:45:00 PM - 30 mins - SO Ref: 37737	£40.50
6	PM	- Lesson 1 - Tuesday 26-Apr-2022 - 05:45:00 PM - 30 mins - SO Ref: 38168	£40.50

Copy CSV Excel PDF Print

← Exit
🔗 Mark direct matches Paid
🔗 Mark all matches Paid

SSOL SO Ref	SSOL Name	SSOL Ref	CDS	Mark Paid
38277		240377		
38275		240547		
38257		240266		
37805		237030		
37737		237429		
38168		239021		

Mark as Paid
🔄 Refresh from GC

On this page, there are two buttons which you can press to do most of the work for you. The Mark direct matches Paid button will link the payments that are direct matches, based on the information we have received from GoCardless and what we already have from SwimSoft.

The Mark all matches as Paid, will mark matches between the two systems but doesn't require every single piece of information.

The amber Link buttons in the Mark Paid column allow you to link individual payments manually. When linking payments manually, you're looking for the SO Ref in the GC Description column to match the one that is in the SSOL SO Ref column.

If there was a previous payment and the order or child has now been deleted from SwimSoft, the payment will only have a Delete button in the Mark Paid column. Deleting these will keep the page clear and allow for new payments to come in.

The list on this page is truncated and so will only show 100 payments at one time. Once the payments on the page have been dealt with, you can press the Refresh from GC button to pull through further payments.

We recommend checking the Synchronise Collections Manually page after the collection date of each set of Direct Debits. This allows the page to stay up to date and will avoid any payments remaining unallocated.