

Moving a late payer midterm

If the student has attended a few lessons but has not paid for their invoice. Please follow one of the two options.

Non-payment

You will need to remove the student from the current course, amend the invoice and add the student to the new course.

To remove the student from the current course, press **History – Edit – Result – Changed Course and Store**

Amend the current invoice by pressing Invoices and Manage Invoices, press the plus (expand) sign next to the outstanding invoice and remove the lesson(s) the student is no longer attending but pressing the red cross adjacent, press exit once complete. Send the amended invoice by pressing **Create Comms** next to the invoice.

Remain in the **CDS** and **Add** the student to the new course and finally send the new invoice email to the client.

Pending GoCardless Collection

Go to the current course (**CDS – History – Edit – Result – Changed Course – Store**)

Next place the client on the new course, only selecting the lesson(s) they will be attending.

Wait for the original invoice to be paid off using the GoCardless collection.

Create a credit equivalent in value to the **total value of the original order minus the value of the lessons they have attended** call it *DD Collection (Insert PM ref here)* and apply this to the new invoice.

If the credit covers the course fee, pay off the new course using the credit.

If there is a balance to be paid, release the payment to collect the difference.