

Adding items to invoices

If you need to add an additional item to an invoice, it can be done for an individual client or a group action for multiple clients.


To add an item to an individual student's invoice, go to **Students** and **Search** from the Main Menu. **Search** and **select** the student you wish to charge the additional item to, and you will need to go to the **Invoices** section of their **CDS**.


Once on the **Invoices** page, press **Manage Invoices** which will take you through to the **Current Orders** page. This page will display a list of all the outstanding invoices against the family. Locate the invoice you wish to add the item to and expand it using the **plus** button to the left of the student's name.

Current Orders						
<input type="checkbox"/>	No	Client	Due Date	Amount		
<input checked="" type="checkbox"/>	4069	Olivia Andrews	04-Mar-2022	£30.00	CDS	Cancel Edit
	Swimming Original - March - Stage 2 - A Sample - CN: 638				Course	
	✗ Lesson 3 - Wednesday 16-Mar-2022 - 12:00:00 PM - 30 mins				Lesson	£10.00
	✗ Lesson 4 - Wednesday 23-Mar-2022 - 12:00:00 PM - 30 mins				Lesson	£10.00
	✗ Lesson 5 - Wednesday 30-Mar-2022 - 12:00:00 PM - 30 mins				Lesson	£10.00
	+ Add Item					

A green plus will appear with the words **Add Item** next to it, you will need to press this.

Order Details

DD Collection Date  **Courses**

Payment Due By  Wednesday 12:00 Stage 2 792 A Sample London Swimming Original

Miscellaneous

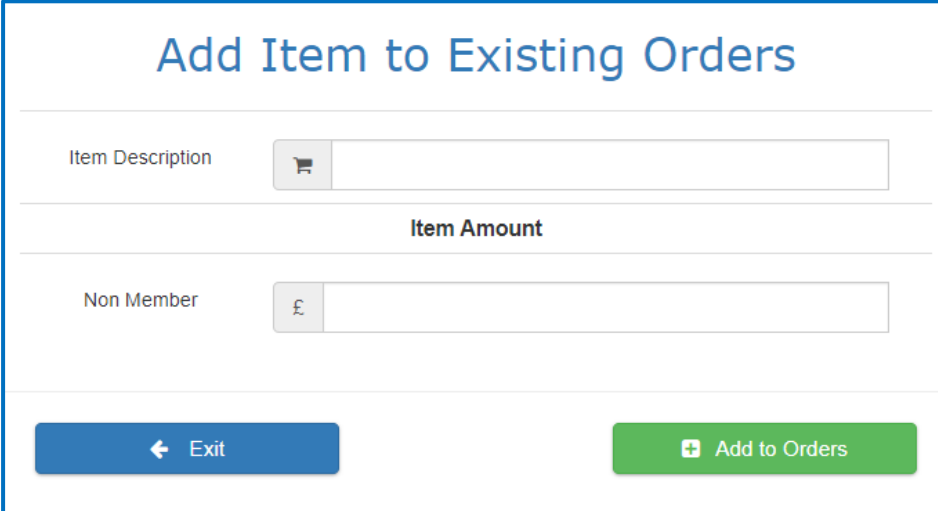
The page will show as above, press the blue miscellaneous **Add** button to add the description and price of the additional item. Once complete, press the **Add To Order** button.

You will be re-directed back to the **Current Orders** page, and you will see the additional item has been added to the order.

On the contrary, you can use a group action to add additional items to a selected group of students at once.

To do this, go to the Main Menu and press **Courses** and then **Search**. Using the filters on the left-hand side of the page, refine your search so the page only shows those to who you wish to add the extra item. For example, if you want to charge everyone that swims on a Monday for a swimming cap, use the **day** filter to select **Monday** and press **Apply**.

Once you have refined your search as much as you wish, press the **Group Action** button at the bottom of the filters list. You will need to select the **Add Item to Existing Order** option, the system will then show you a list of all the students' names who will be affected by this group action. If you are happy that everyone who needs the item added is on the list, you can press the green **Add Item to Existing Order** button at the bottom of the page.



The screenshot shows a form titled "Add Item to Existing Orders". It contains two input fields. The first field is labeled "Item Description" and has a shopping cart icon on the left. The second field is labeled "Item Amount" and has a pound sign (£) on the left. Below the input fields are two buttons: a blue "Exit" button with a left arrow and a green "Add to Orders" button with a plus sign.

The page will show as above, input what you would like the line item to show as in the **Item Description** box. You will then need to input the price of the item for each membership type you have set up within your organisation.

Once complete, press the green **Add to Orders** button and then check one of the student's invoices by going to their **CDS**.