

## Checking Credits and Order Settings

The final steps before placing students onto courses is to make sure that orders are turned on or off as appropriate, and that the credits that are on the system are appropriate.

Starting with the orders, go to **System Configuration** on the **Main Menu** and then **Membership Types**.

Once on the **Manage Memberships** page, double check that the **Create Orders** slider is only switched to **Yes** for those membership types that you require the system to create invoices for. For example, if your staff members receive free lessons for family members, you would have orders switched off as you will not be billing them.

The default membership type for an adult and child will determined what membership type they will have when they are added to the system for the first time, this can be changed in their CDS.

The screenshot shows the 'Manage Memberships' page. At the top, there is a search bar and a filter for 'Inactive Memberships' set to 'Hidden'. Below this is a table with the following columns: Edit, Membership, Create Orders, Adult, Child, and Active. The table contains five rows of membership types: Continuous, Monthly, Siblings, Staff, and Standard. Each row has an edit icon, a name, a 'Create Orders' toggle (Yes/No), and 'Adult' and 'Child' default selection buttons (Set/Default). The 'Active' column has a 'Yes' toggle for each row. At the bottom of the table, there are pagination controls showing 'Showing 1 to 5 of 5 entries (filtered from 8 total entries)' and buttons for 'Previous', '1', and 'Next'. Below the table are buttons for 'Copy', 'CSV', 'Excel', 'PDF', and 'Print'. At the very bottom, there are 'Exit' and 'New Membership' buttons.

Edit	Membership	Create Orders	Adult	Child	Active
	Continuous	Yes <input type="checkbox"/>	> Set	> Set	Yes <input type="checkbox"/>
	Monthly	Yes <input type="checkbox"/>	> Set	> Set	Yes <input type="checkbox"/>
	Siblings	Yes <input type="checkbox"/>	> Set	> Set	Yes <input type="checkbox"/>
	Staff	No <input type="checkbox"/>	> Set	> Set	Yes <input type="checkbox"/>
	Standard	Yes <input type="checkbox"/>	Default	Default	Yes <input type="checkbox"/>

Next step is to check your credits. Go to **Re-enrolment** on the **Main Menu** and then **Unused Credits** on the **sub-menu**.

On this page you will see a list of credits that have been created over time. The table will show who the credit was issued to, for how much, the reason for the credit, the date it was issued and the **Credit Status**.

### Unused Credits

**Filter summary**

Credit Status

All

Clear

Show 50 entries

Search:

Edit	CDS	First Name	Surname	Credit Amount	Reason	Date Issued	Credit Status	Location	Activity	Delete
		Indigo	Spencer	£15.00	Jessica Spencer - Broken Arm	26-Nov-2020	Available	Undefined	Undefined	
		Indigo	Spencer	£10.00	Jessica Spencer - Course 180 refund. Paid lesson(s) 4,5	21-Dec-2020	Available	Brighton	Swimming Original	
		Indigo	Spencer	£15.00	Jessica Spencer - Cancellation of order 1054. Payment receipt no 127	21-Dec-2020	Available	Undefined	Undefined	
		Indigo	Spencer	£4.00	Jessica Spencer - Pool Closure 21/12/2020	21-Dec-2020	Available	Brighton	Swimming Original	

A credit will show as one of two statuses on this page: **Allocated** or **Available**. If a credit is showing as **Allocated**, this means it was created some time ago and has already been issued against a client’s order. A status of **Available** means that the credit will be applied to the next order that is created for that client.

On this page, double-check all the available credits to make sure they have been correctly issued. If you come across a credit that has been issued by mistake, you can simply press the red **Delete** button at the end of the row to remove the credit.

If a credit is deleted, a note will be made in the students **CDS** saying who has deleted the credit and when, and how much the credit was for. This note comes in handy if a credit is deleted by mistake, as you then have all the details you would need to re-issue it.

Once you have checked these two pages, you are in a position to begin adding the students onto the courses in the new term. As you do this, the system will honour your setting, i.e., creating orders and applying credits to said orders.