Day to Day Operation

Checking and releasing PO emails manually.

To send a single Payments Online email to a client, select the **Communications** text option in the **CDS** menu. Then press the button marked **Create Payments Online**. This opens the **email preview page** and allows you to check the message content and the order value.

Please note the Payments Online system will display all outstanding payments, so clients' accounts must be managed correctly.

If you are happy with what you see press the **Send** button, if you are not press, the **Exit** button and take remedial action.

Active individual Payment Online email creation.

If you want the system to automatically create Payment Online emails and place them into the **Communication Manager** for later release, browse the client's **CDS**, select **Payment Method**, then choose **Payments Online** before pressing **Store**. From now on, whenever a client is placed on a course or re-enrols, a Payments Online email will be placed into the **Communication Manager** for you to review and release.

Checking and releasing PO emails en-mass.

All Payments Online emails that have been created automatically will be placed into the **Communication Manager** for you to review and release. They can be accessed from the **Main Menu** by pressing **Client Communication** followed by **Manage Communication**.

Payment Information

As payments are made, SwimSoft will reconcile them for you. Payments can be seen in the following places.

- The **Payment Section** of the client **CDS**
- The **Payment Status** found by pressing **Financials** and **Payment Status**
- The **Daily Taking Total Report** also found in the **Financials** section
- The **Client order V3** report in the **Financials** section.

Chasing Money

If some of your clients fail to pay on the first request, additional Payment Online Emails can be sent either individually by going to Client Data Sheets and pressing **Communications** and **Create Payment Online** email, or by using the bulk document communication system, this is accessed by pressing **Client Communication** on the **Main Menu** and then pressing **Create and Review**. Use the **Help** associated with this page to create new emails.