

How to Resend a Direct Debit Mandate

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Overview

The instructions below guide you how to resend a direct debit mandate request be email to a client if the original email has been misplaced or deleted.

Instructions

To recreate the email, you need to go to the students **CDS**, this is achieved by Clicking **Students** and **Search** on the Main Menu. Enter the students name

| First name Surname | | Search | Reset |
|--------------------|-----------|-------------------|-------|
| Creat | e student | Exit student sele | ct |

Select the student and under financials in the CDS go to **Payment Method**.

| Select a person | CN: 28951 - Ando Swim Term 45 Stage 2 Tue 14:00 A Sample Instructor Main Confirmed Allocated | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|--|--|
| Raggett Family - 235594 | | | |
| Mrs A Raggett - Mother Master Finley Raggett - Child | Info Center - General Information | | |
| Add Student Add Guardian Switch Student Inherit Student Menu - Finley Raggett - 235593 Family Information Client Information General | Title Master First Name Finley Prefers to be called | | |
| Address Contact Correspondence Course History Lessons Add Financials Payment Method | Child O Adult Membership Type Child Third party membership no Imported Student Ref Store Delete | | |
| Top Up Account Invoices Invoice Schedules Payments Credits Notes General | Linked Locations Andover Delete | | |
| Health Issues To Do Waiting List Awards & Progress Communications Membership Switch Student Exit | | | |



The following screen will appear, click Manage.

| Payments Online | 0 |
|------------------------------------|-------------|
| Direct Debit | 0 |
| Status: Awaiting Student Au | thorisation |
| Manage | |
| | |
| Standing Order | 0 |
| Standing Order | 0 |
| Standing Order Generate Invoice | 0 V |

Click Authorise.

| | DDM Details | |
|----------------|----------------------------------|--|
| Description | MOR Solutions Limited | |
| Maximum Amount | £500.00 | |
| Trans Ref | C999397AA01C4E9DBD0E8E0D3CC5F52E | |
| | Cancel | |
| | Authorise | |
| | Delete | |

Once you have clicked Authorise, SwimSoft Online will generate the a Direct Debit Authorisation email. You will need to go to **Client Communication** and **Manage Communication** to send this email.

If any aspect of this manual needs improvement please email support@morsolutions.co.uk with your suggestion(s).