

## Moving a Collection Reference

If a client has been booked onto a course and payment has been requested by Direct Debit, GoCardless will have created a **Collection Reference** these typically start with the letters PM. When a client is moved to a different course before a collection is fully completed, the **Collection Reference** will need to be associated with the new course, this is so that when fees are collected, they settle the appropriate outstanding invoice.

To move a Collection Reference, navigate to the **Invoice** section of the client's **CDS**. Once there, find and copy the **Collection Reference**. These can be found on the second line of the invoice description as shown in italics in the example below.

**Fred Hayley - CN: 8588; Due: 26-Feb-2018; Term: March 2018**  
**DDM: *PM001VDA4XXXX***

Next, proceed to the bottom of the page and press the **Manage Invoices** button, press the **Edit** button beside the invoice you wish to attach the Collection Reference to. Finally, paste the Collection Reference into the section marked **GC Reference** pressing **Store** to save your changes.

**Important note.** Collection references should only be moved if the value of the new course is identical to the value of the original course. If the values are different you are best off cancelling the first collection (in GoCardless) and releasing the order for the second booking.

If any aspect of this document needs improvement, please email [support@morsolutions.co.uk](mailto:support@morsolutions.co.uk) with your suggestion(s).