

How to Resend a Direct Debit Mandate

Overview

The instructions below guide you on how to resend a direct debit mandate request by email to a client if the original email has been misplaced or deleted. If your client's original direct debit mandate link no longer works, please also follow the below instructions.

Instructions

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

Enter your data here and press **Search**

First name Surname **Search** **Reset**

Create student **Exit student select**

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

Select a person
Raggett Family - 235594
Mrs A Raggett - Mother
Master Finley Raggett - Child

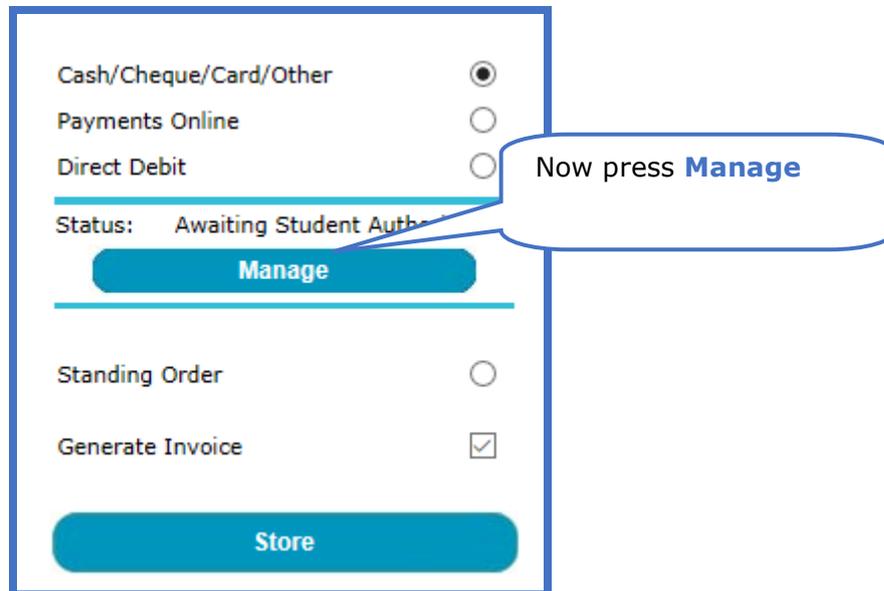
Info Center - General Information

Title: Master
First Name: Finley
Prefers to be called:
Surname: Raggett
Date of Birth: 01 Sep 2011 e.g. 16-Jan-2003
Age: 5yrs 11m
Gender: Female Male
Membership Type: Child Adult
Child:
Third party membership no:

Linked Locations
Andover **Delete**

Next press the **Payment Method** text on the left

The following screen will appear, click **Manage**.



Cash/Cheque/Card/Other

Payments Online

Direct Debit

Status: Awaiting Student Authorisation

Manage

Standing Order

Generate Invoice

Store

Now press **Manage**

Click **Delete**.



DDM Details

Description

Maximum Amount

Trans Ref

Store

Cancel

Authorise

Delete

Now press **Delete**

You will be returned to the **payment method information** page.

The screenshot shows a form with the following elements:

- Radio buttons for "Cash/Cheque/Card/Other" (selected), "Payments Online", and "Direct Debit".
- A horizontal separator line.
- "Status: Not defined" text.
- A blue "Manage" button with a callout box pointing to it containing the text "Press **Manage**".
- Another horizontal separator line.
- Radio buttons for "Standing Order" and a checked checkbox for "Generate Invoice".
- A blue "Store" button at the bottom.

Finally, press Authorise. Once you have clicked Authorise, SwimSoft Online will generate the Direct Debit Authorisation email and place it in the **Communication Manager** ready to send. 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).