Testing the system

General instruction

To test the Payments Online system, you will need to create an order, then send a Payment Online email to yourself and pay it. The best way to start is to create a test family in your name.

Create a test family

From the **Main Menu** press **Students**, followed by **Add**, then enter your details, the most important of which being your *email address*. Once you have completed the details, press the button marked **confirm and open CDS** (Client Data Sheet).

Creating an order/invoice

To create an order, press on the word **Invoices** which you will find in the left-hand menu. Next press the button marked **Create Invoice**, this button will be at the bottom of the **main** page.

Complete the *description*, *amount* fields and *payment due* by date. We recommend that you only put £1 in the amount field. Once the three fields have been completed press the **Create Order** button.

Sending a Payment Online emails

To send the payment request (Payments Online) email, make sure you are in the **CDS** you just created (your test account) and select the **Communications** text option. 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 group, display, and try to collect all outstanding payments so the client's 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.

Once you have sent the email to yourself, find it in your inbox, follow the link in it and pay. If everything is correct, you should see the payment recorded in the **Payment section** of the **CDS** a short while after making the payment.