Setting up Family

Introduction

To use the MOR Money system, clients need a **Family Account**.

There are five ways to create a Family Account:

1. Via the **Client Data Sheet** (CDS) – used during onboarding.
2. Via a **Group Action** from **Client Orders V3**
   a. **Financials** - Client Orders V3 - Group Actions - Client Accounts
3. Via a **Group Action** from **Course Search**
   a. Courses - Search - Group Actions - Client Accounts
4. Via the Checkout, on a one-by-one basis.
5. Via the Checkout, in bulk by processing a group of clients.

This document explains how each method works.

Swim Schools that were already using SwimSoft before the introduction of MOR Money can choose which clients they create accounts for. This allows the new system to be introduced gradually and commissioned at a pace that suits the Swim School.

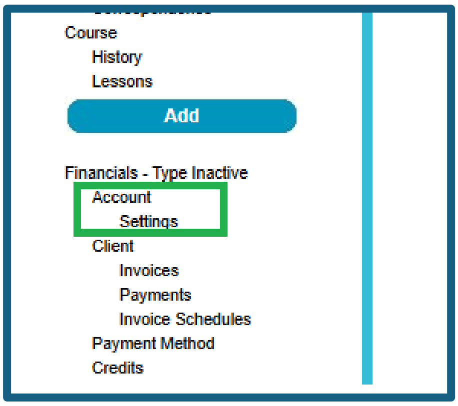
Please note. Account Types need to be created before Family Accounts can be created: see **Main Menu** - **MOR Money - Account Types - Help**

Method 1 – Via the CDS

Access the CDS record of the client you want to create an account for.

Press **Settings** in the left-hand menu, as shown in **Image One**, to open the family's **Account Settings** page.

Image one



Once the **Account Settings** page is open, there are six items to review and configure, as shown in **Image Two**.

1. Account Type

Select the **Account Type** required for the family.

2. Top Up Amount

The **Top Up Amount** determines how much money you want to maintain in the family's account.

- If you want to collect all outstanding fees, set this to **£0**.
- If you want to use SwimSoft's **Top Up System**, enter the amount you want the family account to be topped up to.

Example

If you set the Top Up Amount to **£60**:

1. Initially, £60 will be collected from the client.
2. As lessons are charged to the account, the balance will reduce.
3. For example, if the family has four lessons at £10 each, the balance will reduce from £60 to **£20**.
4. When the account is topped up, SwimSoft will create a bill for **£40**, bringing the account balance back to £60.

This allows the family to maintain a £60 balance ready to pay for their upcoming lessons.

3. Client Hub Status

When this option is ticked, the client will be able to view the **Financials** page in the Client Hub.

4. Account Communications

This section determines who will receive communications relating to the Family Account, including:

- Account Invoices
- Account Receipts
- Account Statements

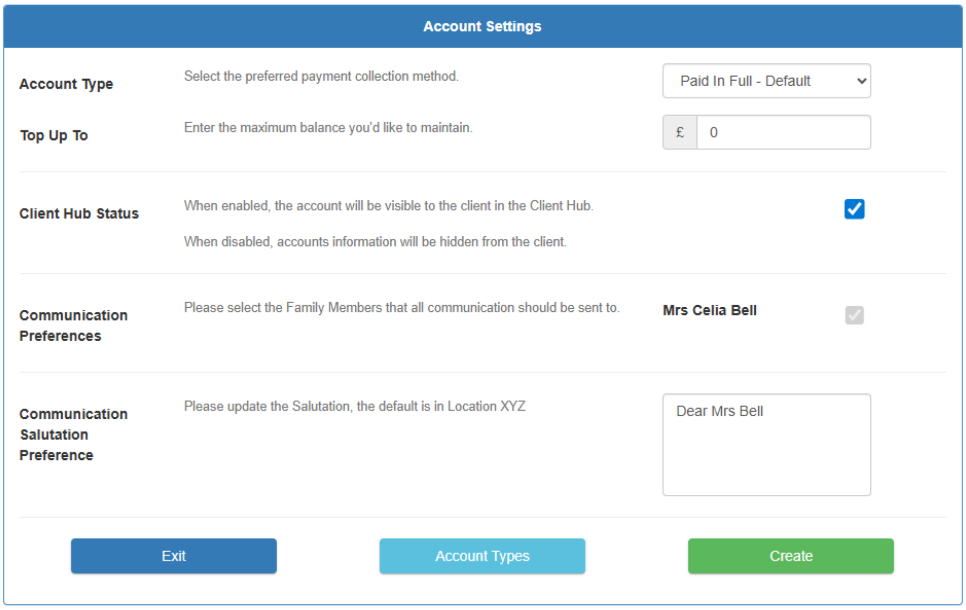
5. Communication Salutation

This determines the salutation used for MOR Money account-related communications.

6. Account Settings

Review the remaining account settings and ensure they are configured correctly for the family.

Image Two



Method 2a – Via Client Order V3

Go to: **Main Menu - Financials - Client Orders V3 - Group Actions - Create Accounts**

During the process, you can select the clients you want to create accounts for and then select the **Account Type** you want to create. Clients who already have an account will be excluded from the process.

Method 2b – Via Course Search

Go to: **Main Menu - Courses - Search - Group Actions - Create Accounts**

During the process, you can select the clients you want to create accounts for and then select the **Account Type** you want to create. Clients who already have an account will be excluded from the process.

Method 3 – Via the Checkout

There are two routes to the Checkout. The first is the quickest way to view all clients:

1. Main Menu - **Financials** - **Checkout**
2. CDS - **Checkout** - **Show All Orders**

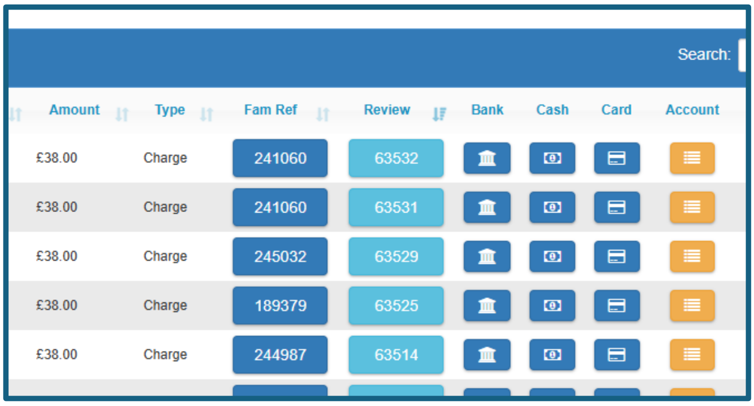
Method 3a – Via the Checkout one by one

To create an account for an individual client, press the **amber button** in the Account column.

This will do two things:

1. Help you create an account by prompting you to select the required **Account Type**.
2. Move the charge to the new Family Account.

Please note: A **green button** in the Account column means the client already has an account. Pressing the green button will move the charge to the client's existing account.


Search:

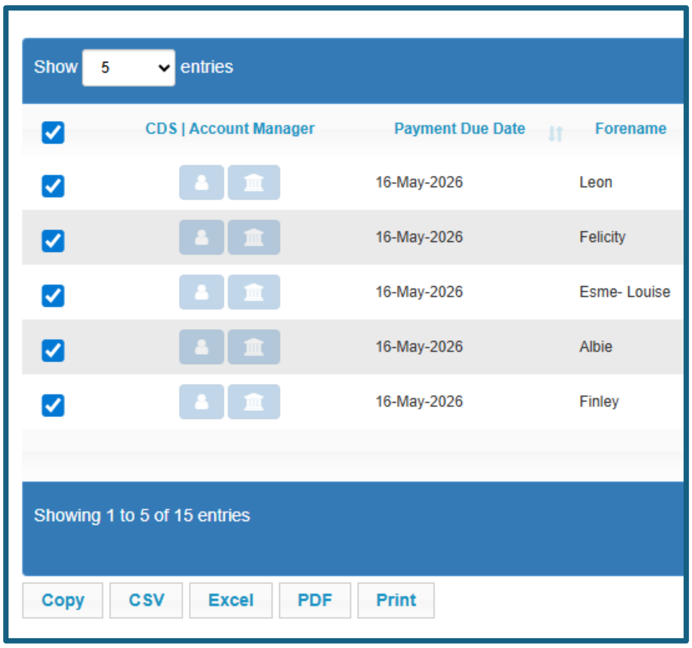
Amount	Type	Fam Ref	Review	Bank	Cash	Card	Account
£38.00	Charge	241060	63532				
£38.00	Charge	241060	63531				
£38.00	Charge	245032	63529				
£38.00	Charge	189379	63525				
£38.00	Charge	244987	63514				

Method 3b – Via the checkout in bulk

To create accounts for multiple clients:

1. Select all the clients you want to create accounts for, as shown in **Image One**.
2. Press **Transfer to Account**, as shown in **Image Two**.
3. You will be prompted to select the **Account Type**.

Image One

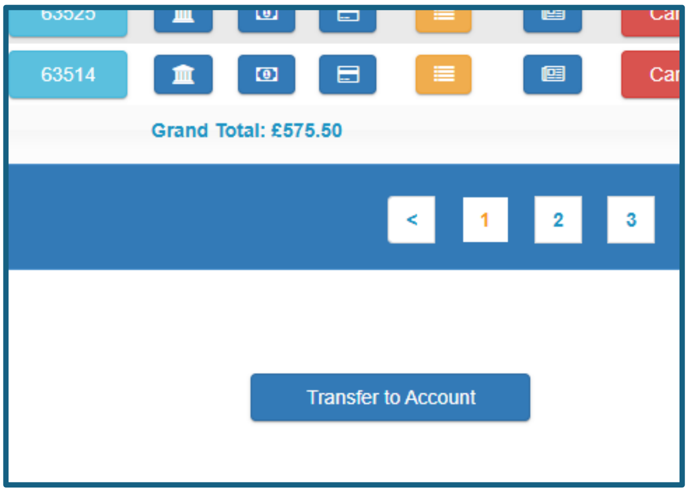

Show 5 entries

	CDS | Account Manager	Payment Due Date	Forename
		16-May-2026	Leon
		16-May-2026	Felicity
		16-May-2026	Esme- Louise
		16-May-2026	Albie
		16-May-2026	Finley

Showing 1 to 5 of 15 entries

Copy CSV Excel PDF Print

Image Two



The bulk process will:

1. **Create accounts** for families who do not already have one. You will be asked which Account Type to use.
2. **Move all charges** to the new Family Account.
3. If the account is set to **Auto**, a collection will be created for the client.

Tip: The Checkout is particularly useful when introducing MOR Money to an existing SwimSoft database, as it allows you to create accounts and transfer existing charges at the same time.