Transfers and Write-offs

Introduction

The Transfers and Write-Offs page reviews orders in SwimSoft to identify those that remain unpaid. From this page, administrators can review an order, record a payment, transfer the order to a Family Account, or write off the outstanding amount.

Below is a guide to the table and what each element shows.

- **Selector:** Used to select one or more orders for use with the **Bulk Write Off** button at the bottom of the page.
- **Review:** Opens the order for an administrator to review.
- **Required by:** Shows the date the order was due to be paid.
- **Family ID:** Shows the family's unique reference number.
- **First and last name:** Shows the client's name.
- **Total:** Shows the total value of the order.
- **Credit:** Shows the total value of any credits currently allocated to the order.
- **Write off amount:** Shows the amount that will be written off.
- **Write off:** Writes off the outstanding amount. A **Write Off Credit** is created for the amount due and applied to the order, which then marks the order as paid. This ensures there is a clear record of how each order has been handled. Orders are never simply deleted from the system.
- **Checkout**
  Provides a shortcut to the **Checkout** page, where the user can:
  - Pay the order.
  - Proceed to the CDS to review payments.
  - Open the client's **Family Account** and transfer the order to it.

Bulk Write Off

The **Bulk Write Off** option allows multiple orders to be written off at the same time. Select the required orders using the selectors and then select **Bulk Write Off** at the bottom of the page.