Unused Credits

Introduction

The **Unused Credits** page allows you to view and manage credits issued to clients. It supports organisations using **SwimSoft as a stand-alone solution** and those using **SwimSoft alongside MOR Money**.

The Credits Table

The table contains the following information and actions:

- **Edit** – Allows an unallocated credit to be edited. This button is only enabled when the credit has not been attached to an order or transferred to a client's Family Account.
- **CDS** – Opens the client's **Client Data Sheet (CDS)**.
- **Transfer** – Only available when **MOR Money** is activated. Allows an available credit to be transferred to the client's **Family Account**.
- **First and Surname** – Displays the client's name.
- **Credit Amount** – Displays the amount of the credit.
- **Reason** – Displays the reason the credit was issued.
- **Date Issued** – Displays the date the credit was created.
- **Credit Status** – Shows whether the credit is:
    - **Available** – The credit has not been allocated to an order or transferred to a client's Family Account.
    - **Allocated** – The credit has been allocated to an invoice.
- **Location and Activity** – Displays the location and activity the credit relates to. If the credit was issued manually through the client's CDS and was not linked to a location or activity, these fields will display **Undefined**.
- **Delete** – Allows a credit to be deleted. When a credit is deleted, a note is automatically added to the client's CDS recording:
    - The date the credit was deleted.
    - Who deleted the credit.
    - The credit amount and reason.

Filter

The page has one filter, allowing you to restrict the table to show either **Allocated** or **Available** credits.