

Transfer Patron Account Data

Last Modified on 10/21/2024 8:21 am CDT

Transfer Patron Account Data | Account Management Report

This functionality is only available to customers who have purchased Campus Point of Sale as add-on functionality.

Tool Search: Account Management Wizard

This option transfers patron(s) account data to a new or existing account. For example, when individual accounts move to a family account or a family account separates into individual accounts.

Account details like adjustments, deposits, transactions and balances are tied to the patron(s) and transfer to the new/existing account to which they are transferred.

After the patron's data is transferred, if there aren't any patrons left on the account, the Account Management Wizard deletes the empty account from the database.

Account Management Wizard ☆
Food Service > Wizards > Account Management Wizard

Account Management Wizard

The Transfer Patron(s) Account tool can be used to transfer patron(s) account data to a new or existing account. For example, when individual accounts move to a family account or a family account is separating into individual accounts.

Step 1: Enter the account number to transfer the patron from.
 Step 2: Select a new account type (individual or family) or enter an existing account number to which the patron account is being transferred.
 Step 3: Select Test to preview changes before selecting Transfer. After data is transferred it cannot be undone.

Infinite Campus recommends running this tool outside of regular work hours. Today's transactions must post to the server before running this tool. If today's transactions have not posted to the server, the data will be lost.

Mode: Transfer Patron Account
Transfer Patron(s) to New Account: Individual Family

OR

Transfer Patron(s) From Account Number:

From Account 5662

Campus, Barry

Balance: **\$163.25**

Adjustments: 0

Deposit: 2

Funds Transfer: 0

Transactions: 265

Voids: 0

Transfer Patron(s) To Existing Account Number:

To Account 5665

Campus, Ethan

Balance: **\$0.00**

Adjustments: 0

Deposit: 0

Funds Transfer: 0

Transactions: 0

Voids: 0

Transfer Patron Account Editor Example

Transfer Patron Account Data

1. Select **Transfer Patron** from the **Mode** dropdown list.
2. Enter the account number from which you want to transfer patron(s) in the **Transfer Patron(s) Account Number** field and click the **Search** button.

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Result

The wizard displays all of the patrons on the account.

3. Select the checkbox(es) next to the patron(s) you want to transfer.
4. Complete one of the following options.

| To transfer patron(s) to... | Then... |
|------------------------------------|--|
| new individual accounts | click the Individual radio button. An individual patron account cannot be transferred to a new individual account. |
| a new family account | click the Family radio button. All patrons of an existing family account cannot be transferred to a new family account. |
| an existing account | enter the account number to which you want to transfer patron(s) in the Transfer Patron(s) To Account Number field and click the Search button. Result The wizard displays all of the patrons on the account. |

5. Click the **Test** button to test the account data transfer and verify the results. The Account Management Report displays.
6. Review the Account Management Report and verify the results.
7. Click the **Transfer** button. The patron(s) account data is transferred and the Account Management Report displays with the final account information.

Account Management Report

The Account Management Report displays after the **Test** or **Transfer** buttons are clicked on the Account Management Wizard. The account from which the patron(s) data is being transferred displays on the left side of the report. The account(s) to which the patron(s) data being transferred displays on the right side of the report. If a family account is separating into multiple individual accounts, multiple accounts will display.

Report Examples

| | | | | | |
|---|---------|--|-----------------|--------|--------|
| 0347 CAMPUS District 1234 109th Ave NE , Blaine MN 55449 Generated on 08/22/2011 10:54:27 AM Page 1 of 1 | | Account Management Report Mode: Transfer Patron(s) Account To New Account | | | |
| Transfer From <u>Account 102</u> Smith, Stephen Smith, Beth | | Transfer To <u>Account 5201</u> Smith, Stephen | | | |
| | Before | After | | Before | After |
| Balance: | \$17.50 | \$15.15 | Balance: | \$0.00 | \$2.35 |
| Adjustments: | 2 | 1 | Adjustments: | 0 | 1 |
| Deposit: | 53 | 0 | Deposit: | 0 | 53 |
| Funds Transfer: | 1 | 1 | Funds Transfer: | 0 | 0 |
| Transactions: | 905 | 0 | Transactions: | 0 | 905 |
| Voids: | 2 | 0 | Voids: | 0 | 2 |

Example of transferring patron to a new individual account

| | | | | | |
|---|---------|---|-----------------|--------|---------|
| 0347 CAMPUS District 1234 109th Ave NE , Blaine MN 55449 Generated on 08/22/2011 01:36:18 PM Page 1 of 1 | | Account Management Report Mode: Transfer Patron(s) Account To Existing Account | | | |
| Transfer From <u>Account 14927-7447</u> Young, Beth Account deleted from database | | Transfer To <u>Account 14963-7782</u> Young, Beth Johnson, Joe | | | |
| | Before | After | | Before | After |
| Balance: | \$50.00 | \$0.00 | Balance: | \$3.45 | \$53.45 |
| Adjustments: | 0 | 0 | Adjustments: | 0 | 0 |
| Deposit: | 30 | 0 | Deposit: | 47 | 77 |
| Funds Transfer: | 1 | 0 | Funds Transfer: | 0 | 1 |
| Transactions: | 947 | 0 | Transactions: | 939 | 1886 |
| Voids: | 5 | 0 | Voids: | 3 | 8 |

Example of transferring patron from an individual account to an existing account

| | | | | | |
|---|---------|--|-----------------|--------|--------|
| 0347 CAMPUS District 1234 109th Ave NE , Blaine MN 55449 Generated on 08/23/2011 12:17:41 PM Page 1 of 1 | | Account Management Report Mode: Transfer Patron(s) Account To New Account | | | |
| Transfer From <u>Account 5200</u> Smith, Andrew Smith, David Brown, Ann | | Transfer To <u>Account 5202</u> Smith, Andrew | | | |
| | Before | After | | Before | After |
| Balance: | \$15.00 | \$5.00 | Balance: | \$0.00 | \$3.00 |
| Adjustments: | 1 | 0 | Adjustments: | 0 | 1 |
| Deposit: | 0 | 0 | Deposit: | 0 | 0 |
| Funds Transfer: | 1 | 1 | Funds Transfer: | 0 | 0 |
| Transactions: | 6 | 1 | Transactions: | 0 | 4 |
| Voids: | 0 | 0 | Voids: | 0 | 0 |
| Transfer From <u>Account 5200</u> Smith, Andrew Smith, David Brown, Ann | | Transfer To <u>Account 5203</u> Smith, David | | | |
| | Before | After | | Before | After |
| Balance: | \$15.00 | \$5.00 | Balance: | \$0.00 | \$7.00 |
| Adjustments: | 1 | 0 | Adjustments: | 0 | 0 |
| Deposit: | 0 | 0 | Deposit: | 0 | 0 |
| Funds Transfer: | 1 | 1 | Funds Transfer: | 0 | 0 |
| Transactions: | 3 | 1 | Transactions: | 0 | 1 |
| Voids: | 0 | 0 | Voids: | 0 | 0 |

Example of transferring some patrons from a family account to individual accounts

