Transfer Patron Account Data

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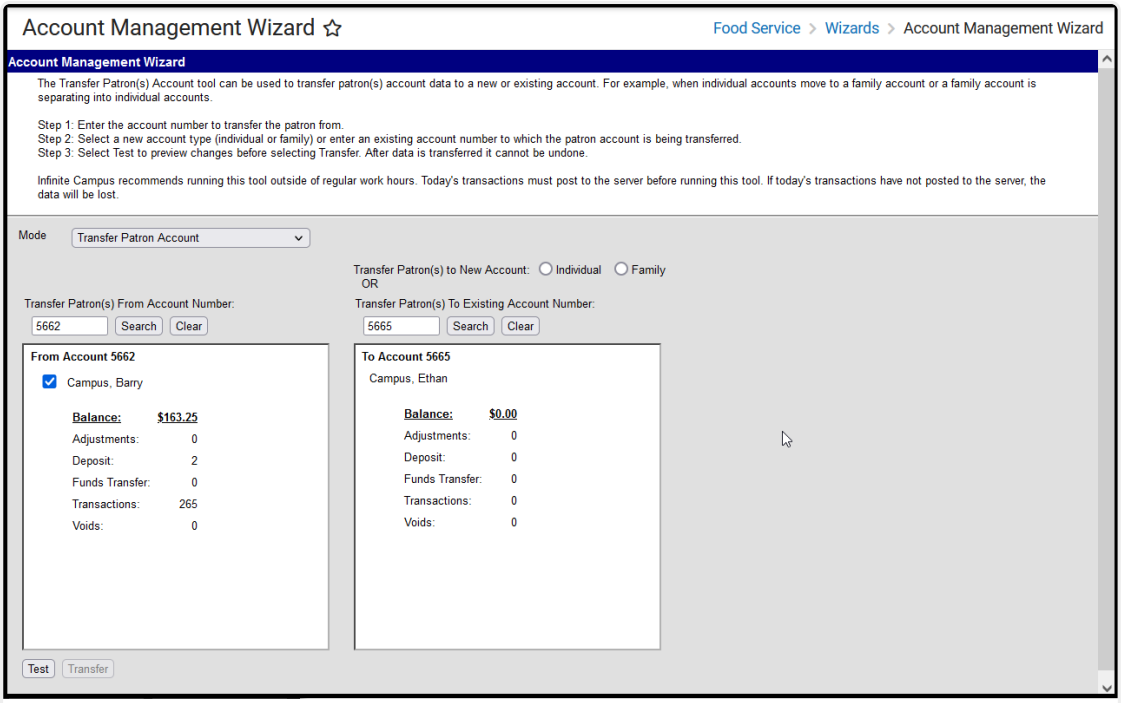
> Point of Sale (POS) tools are available with Campus Food Service.

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.



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.
   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
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Account Management Report
Mode: Transfer Patron(s) Account
To New Account

Transfer From

Account 102
Smith, Stephen
Smith, Beth

Transfer To

Account 5201
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

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1234 109th Ave NE , Blaine MN 55449
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Account Management Report
Mode: Transfer Patron(s) Account
To Existing Account

Transfer From

Account 14927-7447
Young, Beth
Account deleted from database

Transfer To

Account 14963-7782
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

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1234 109th Ave NE , Blaine MN 55449
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Account Management Report
Mode: Transfer Patron(s) Account
To New Account

Transfer From

Account 5200
Smith, Andrew
Smith, David
Brown, Ann

Transfer To

Account 5202
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

Account 5200
Smith, Andrew
Smith, David
Brown, Ann

Transfer To

Account 5203
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