

Migrate Banks to New Payment Platform (Payments Migration)

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Classic View: System Administration > Payments > Payment Setup

Campus is changing payment vendors. This article provides the steps you need to migrate your bank accounts from the current payment vendor to the new one.

You will need the full bank account number for each bank account you are migrating. If you cannot edit a bank account in the migration tool, that means your district already created the bank account during the onboarding process.

What to Expect After Migrating to the New Payment Platform

For a few weeks, you may see updates to transactions processed through Vanco and updates for transactions processed through the new payment platform in the [Payments Reporter](#). The Payment Reference Number for transactions from the new payment platform begins with **p1_txn**. To exclude Vanco transactions and only see transactions from the new payment platform, use **p1_txn** in the *Payment Reference Number* column to filter results in the [Payments Reporter](#).

Step 1: Getting Started

Classic View: System Administration > Payments > Payment Setup > Bank Accounts

Before you begin, select **All Schools** and print a list of all bank accounts currently set up in Campus.

- Use this list to verify the bank name, routing number, and the last four digits of the bank accounts set up in Campus.
- All active bank accounts on the report will be migrated. If there is a bank that you do not want to migrate to the new payment platform, inactivate the bank account.

Correcting Bank Account Conflicts

If a bank account is missing or something is wrong with a bank account, this indicates there is conflicting information between the old payment platform and Campus. **The conflict must be corrected before you can migrate your bank accounts.** Complete the following steps to correct the conflict.

1. Create the correct bank in Campus: System Administration > Payments Setup > Bank Accounts > NEW.

- Select the correct bank in the **Vendor Bank Account** dropdown list.
- 2. Edit all Fund Accounts that are assigned to the wrong bank and reassign them to the new bank account.
- 3. Inactivate the incorrect bank account.

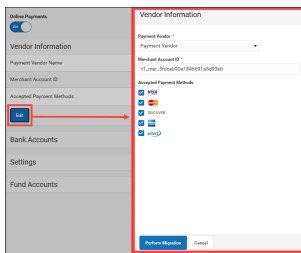
Step 2: Update Vendor Information

Classic View: System Administration > Payments > Payment Setup > Vendor Information

1. Go to Vendor Information and click **Edit**.

Result

The Vendor Information Panel displays.



2. Select *Infinite Campus Payments* in the **Payment Vendor** field.
3. Enter your new **Merchant Account ID** that you copied from your support case. Make sure there are no spaces before or after the ID.
4. Click **Perform Migration**.

Result

The panel **Preview Migrating Banks** displays. Continue to **Step 3: Migrate Banks**.

Step 3: Migrate Banks

Classic View: System Administration > Payments > Payment Setup > Vendor Information

All active bank accounts display on the Preview Migrating Banks panel. You may notice a different number of bank accounts compared to your bank account list because Campus is only validating bank accounts and not bank account IDs.

If you see a bank account that you do not want to migrate, please cancel and inactivate the bank account before you complete the migration process. If you can't edit a bank account, this means your district already created this bank account during the onboarding process with the new payment vendor. The names of the banks that are already set up with the current payment vendor appear along with their routing number and the last four digits of the account number.

Once the bank account migration process is complete, it cannot be undone.

Preview Migrating Banks

All active bank accounts display on this panel. You may notice a different number of bank accounts compared to your bank account list because Campus is only validating bank accounts and not bank account IDs. If you see a bank account that you do not want to migrate, please cancel and inactivate the bank account before you complete the migration process. If you can't edit a bank account, this means your district already created this bank account during the onboarding process with the new payment vendor. Once the bank account migration process is complete, it cannot be undone.

BANK NAME	ROUTING NUMBER	BANK ACCOUNT LAST 4	BANK ACCOUNT NUMBER	
Existing Vendor Bank Name: Campus School District bank Campus Bank Name: Infinite Campus Bank	123456780	Existing Vendor Last 4: *4670 Campus Last 4: *0070	<input type="text"/>	INVALID ACCOUNT
Existing Vendor Bank Name: BANK OF AMERICA N.A. Campus Bank Name: BANK OF AMERICA N.A	011100012	*5544	*5544	
BANK OF AMERICA N.A	011000390	*0401	*0401	
F & A FEDERAL CREDIT UNION	322078383	*2555	*2555	
F & A FEDERAL CREDIT UNION	322078383	*5900	<input type="text"/>	
WELLS FARGO BANK NA (MINNESOTA)	091000019	*4444	<input type="text"/>	

Example Preview Migrating Banks Screen

1. Enter the complete bank account number in the Bank Account Number field.

If you can't edit a bank account, this means your district already created this bank account during the onboarding process.

2. Correct any Invalid Account errors by using the process from **Step 1: Getting Started**. You must correct all errors and enter all Bank Account Numbers before you can continue.
3. Click **Complete Migration**.

Result

A confirmation message displays.

4. Click **OK**.

Result

Campus migrates your banks to the new payment platform. During the migration, Campus creates two Fund Accounts: **FEE** and **Transaction Fee**. The new Fund Accounts are assigned to the same bank account that is assigned to the district's Default Fund Account. Verify the bank account assigned to these Fund Accounts and change the bank account if necessary. Be sure to select "All Schools" before editing these Fund Accounts.

Campus validates bank accounts after the first deposit is made to it. If a bank account is invalid, a message appears in the Process Alerts (provided you have rights to the bank accounts and All Schools) and it will be labeled accordingly.