

Transfer Patron Account Data

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[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.

Classic View: [Point of Sale](#) > [Account Maintenance](#) > [Account Management Wizard](#)

Search Terms: [Account Management](#)

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

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(s) to New Account: Individual Family
OR

Transfer Patron(s) From Account Number:

Transfer Patron(s) To Existing Account Number:

From Account 5200

Smith, Andrew

Balance:	\$20.00
Adjustments:	1
Deposit:	0
Funds Transfer:	0
Transactions:	0
Voids:	0

To Account 109

Smith, Madison

Balance:	\$0.00
Adjustments:	0
Deposit:	39
Funds Transfer:	1
Transactions:	697
Voids:	21

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.

To transfer patron(s) to...	Then...
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.

Result

The [Account Management Report](#) displays.

6. Review the [Account Management Report](#) and verify the results.

7. Click the **Transfer** button.

Result

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			Transfer To		
<u>Account 102</u> Smith, Stephen Smith, Beth			<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