Family Record, Financials Tab -Transfer Balance

Last Modified on 01/11/2019 12:19 pm EST

The Transfer Balance feature allows administrators to transfer an entire balance or partial balance to another family.

1. Search for the family to <u>transfer the balance from</u> by entering the last name into the Search box or using the magnifying glass

Search			-									
☆ Ho	me Fami	iy Paym	ents At	tendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	Q
<	Mil Fam Inte	ler Family ily ID 4131 rnal Note:	y 190				Stı	A - B	C - D K - L	E - I M - I	F	G - H O - P
Summary	Family	Children	Parents	Third Party	Volunte	ers Co	mmunication	Q - R	S - T Y - Z	U - Y	v	W - X
Year	2018	•						Sho		Yes	() N	0
Sta	tement	List							Advanc	ed Searc	ch	

2. Select the Financials tab

☆	Home	Famil	y Payn	nents A	ttendance	Lessons	Meals	Connect	Approvals	Reports	Staff	Setup	Q	Q	
	<	Mill Fami Inter	er Famil ly ID 413 nal Note:	y 190				Stu	4 ident(s)		Reg Statem	ular ent Type		436.00 Balance Outstanding Add/View Journal Notes	
Summ	ary Fa	mily	Children	Parents	Third Party	Voluntee	ers Co	mmunication	Auto-Pay	Vacation	Finar	icials R	eceipt	pts Merge	
Year	r] 2	018	•								Total \$ 43	Outstandi 6.00	ing:	Actions -	

3. The click Actions and select Transfer Balance

Vacation	Financials	Receipts	Merge	
	Total Outsta \$ 260.50	anding:	Actions -	
		Fee	Adjustments/Add Fee Charge/Reduce Revenue Make Payment	
		2	8: Coupons	
d 01/11/2	019		Pickup Fee	
tration Fee			PrePay Deposit Transfer Balance	
		2	29 Voided Payments	

4. In the Transfer Balance section, the From Family's information will be filled in. Search the To Family's information using the family name or family ID

Transfer Balance 🕼			
From Family			
4 13190	To Family Search	giant	Q
		DCW Transactional- CENTER 1 <b< td=""><td>r/> - Giant Family (ld: 323498)</td></b<>	r/> - Giant Family (ld: 323498)

5. Once the To Family is selected, the fields below will be completed

automatically

From Family 🕼	To Family 🕜
Family ID	Family ID
4 13190	3 23498
Family Name	Family Name
Miller Family	Giant Family
Center	Center
DCW Transactional- CENTER 1	DCW Transactional- CENTER 1
Balance	Balance
\$ 260.50	\$ 606.00
Ledger	Ledger
A	v <u>a</u>

6. Amount to Transfer - enter the amount of the balance to transfer to the

new family

- 7. Notes enter any additional notes
- 8. Click Save