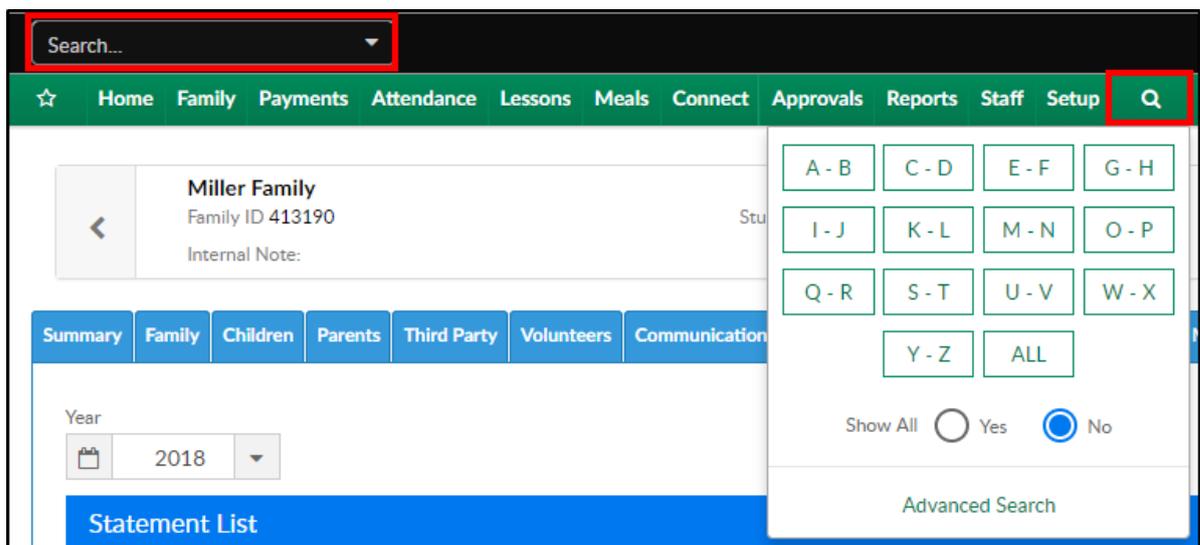


Family Record, Financials Tab - Transfer Balance

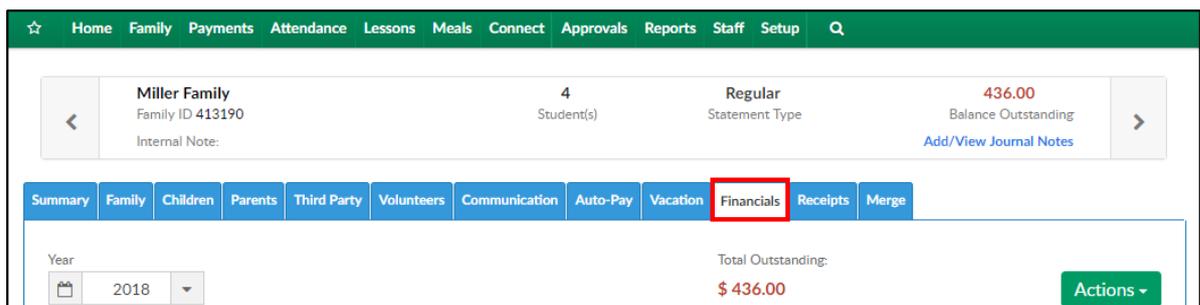
Last Modified on 01/11/2019 12:19 pm EST

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

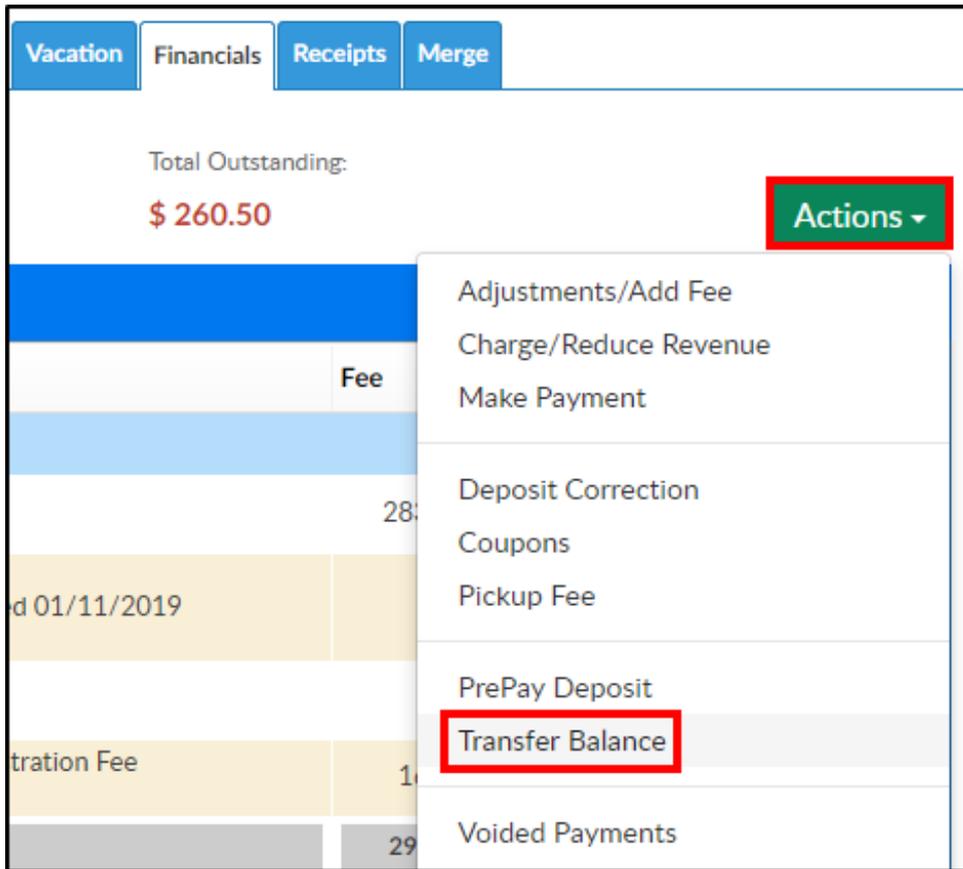
1. Search for the family to transfer the balance from by entering the last name into the Search box or using the magnifying glass



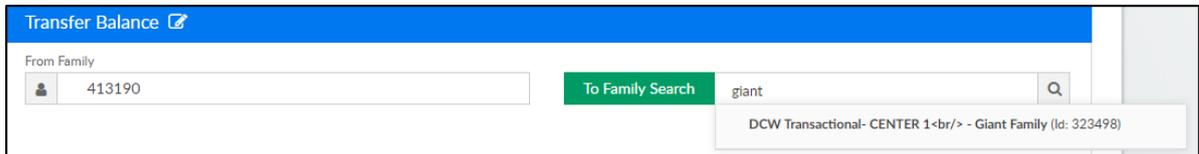
2. Select the Financials tab



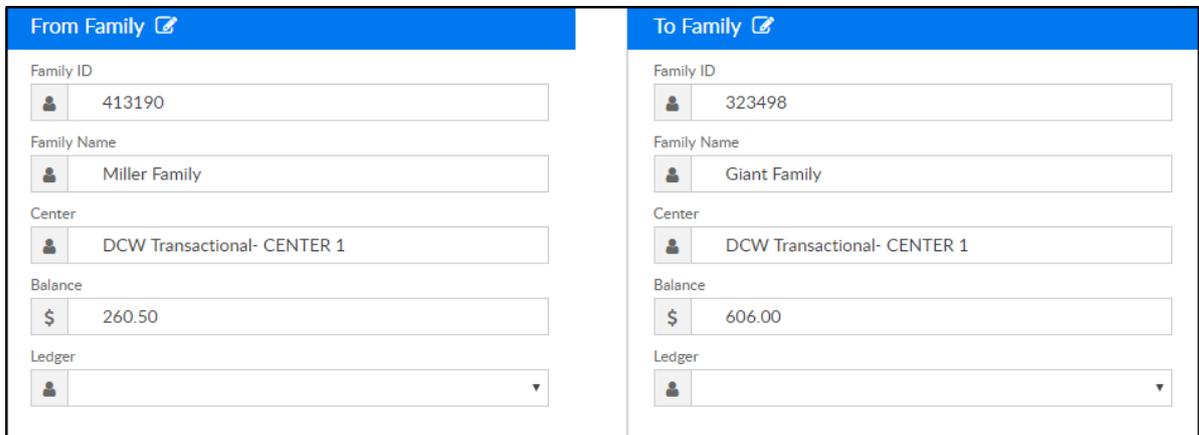
3. The click Actions and select Transfer Balance



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



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



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
-