



Transfer Unpaid Fees

***Student must be in new entity before fees can be transferred.**

1. Select  > **Administrative Access** > **Fee Management**.
2. Select **Customer** under **Features**.
3. Verify you are in the correct Entity and school year by checking the information at the top left of the screen.
4. To locate the customer you wish to attach a fee to, enter the customer's name in the Search Customer Full Name field near the top left of the screen or use the scroll bar to search through the list of customers.
5. Under the **Customers** heading, click the  icon to the left of the Customer you wish to transfer unpaid customer fees for.
6. Select **Transfer Unpaid Customer Fees** from the menu.

If the student does not have any unpaid fees, this option will not display. Additionally, you cannot run this process if the student has an unapplied amount.


7. Complete the appropriate fields.

Required fields are identified with an asterisk. You must complete required fields before you can save your work.

- a. Under the **Customer Fee Details** heading, select the appropriate radio button for the Transfer Fee Type.

If you choose Transfer Amount Due as Single Fee, the separate fees will be consolidated into one fee. The code will be PriorBal, and the description will include Prior Balance, the school year, and the entity the transfer fee is from.

If you choose Transfer Amount Due as Multiple Fees, the fees will transfer as individual fee records. The code will begin with TF: and the school year to indicate it is a transfer fee, and the description will include the school year, fee description from the source entity, and entity the transfer fee is from.

- b. Enter the Target Entity or click the  icon to choose from the drop-down list.
- c. Enter the Effective Date or click the **Date** icon to choose a date using the calendar.
- d. Enter the Due Date or click the **Date** icon to choose a date using the calendar.
- e. Under the **Customer Fees** heading, check the box to the left of the Fees you wish to transfer.
- f. Click **Next** near the top left of the screen.

8. Click **Run Process** near the top left of the screen.

9. Click **Close** near the top left of the screen.