



## How To Guide - Year End Procedures

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The following are the Year End Procedures for the Hot Lunches Application.

### ***Save User Balances***

User balances can be saved from year to year. When parents register for their new account in September the system will look for a saved user balance based on the parent's email address and phone number. If a saved balance entry is found it is posted to the parent's account as a **"Balance Forward"**. This applies to both credit and debit balances.

Before saving any user balances please post any payments and charges for the year. If a family is not returning to the school in September you may write them a check for any outstanding balance payable and you should post this before saving balances.

1. Go to **"ADMINISTRATION"** => **"Save and Manage User Balances"**.
2. Click the **"Save User Balances"** button to save the current balances.
3. You can clear the saved user balances at any time and save the data again if required.
4. Click **"List User Balances"** to view the saved entries. Each saved balance is identified by user id, name, email address and phone number. When posted to a parent account the entry will be flagged as posted.
5. To have the user balances posted to their account as a balance forward you will need to ensure that the **"Application Profile"** parameter **"Previous User Balance Post"** is set to **"Post Automatically"**

### ***Delete Existing Parents and Students***

#### **Why Delete the Parents and Students:**

- Some parents will forget their account and try to create a new one and then be frustrated when they can't add their children to the new account. Or they will call you to look up their old info and password.
- Some students have left the school and you cannot delete them without deleting their orders and this will potentially mess up the account balances if the family has other children in the school.
- Privacy laws state that you cannot retain information of students who have left the school.
- **And the best reason of all, it is less work for you to delete them and let parents register again.**

Privacy laws are very clear regarding collecting and retaining data, and we are not permitted to keep data for parents or students who have left the school. It is also a minor security issue to have parent accounts that are no longer in use. To this end we must delete the parents and students each year.

1. Go to **"ADMINISTRATION"** => **"System Reset"**.
2. The top box is labeled **"Annual System Cleanup"** and when you click the **"Parents & Students"** button all parents, students, orders and user account entries will be removed from the system.

The staff, classes, suppliers, products, schedules and menus will not be deleted.