



## END OF SCHOOL YEAR ROUTINE

- 1) Create a backup of the FSS database and store it at another location. ***This should be done by the technology department.*** FSS support can assist as needed.
- 2) If using the Auto Import; the FSS Data Sentinel Service should be turned off prior to graduating seniors.
- 3) Open the FSS ADMIN program.

- 4) Print and save as a PDF file, the following reports, ***before you graduate seniors:***

### Reports→School Reports

- Cafeteria Report, for the year, for each school.
- Account Balances report for each school.
- Meal roster for each school, for future comparison

### Reports→By Customer

- A final statement for each graduating senior. You'll want 2 copies, 1 to mail as the final statement or with a refund, and one for your records.

- 5) Next you will graduate your students using the following steps:

***NOTE: This routine will zero out their accounts and deactivate them.***

- Click on **Schools**, at the left; double click to select the school containing the seniors.
- Click on the **Options** tab and select **Graduate Customers**, or **Graduate Seniors**; then select the grade.
- You may choose to select all customers or you may check specific customers.
- Click: **Print Report**, if you do not print the report you will not be able to complete this action.
- Click **Save Results**. You will see the process begin. When finished, you will receive a message "**Processing Complete**".
- Click **Close** to Exit the Graduate Customer screen and Close to the School details to get back to the main screen.

- 6) Close FSS ADMIN—End of year process is complete



***NOTE: Your technology department may want to consider archiving the data prior to the last school year to speed-up processing time (we can assist with this routine).***

## **BEGINNING OF SCHOOL YEAR ROUTINE**

### **Update the Database for the new school year**

***If your school is using the Auto Import Routine, the new file should be provided for the Auto Import to update the students.***

- 1) Create an updated CSV file from your student management system for the district. Include both existing and new students in the file. *Make sure existing students have the same Id and Pin numbers from the previous year.*
- 2) Copy this file to the FSS server or have it available for your upgrade appointment.
- 3) Contact FSS Support to setup an appointment for the import.
  - a. Phone—1-800-425-1245, Option 2
  - b. Email—support@foodserve.com