

# Sentral Finance – Activities #2



## Students, Attachments, Approval and Publish to Portal and App

### Key highlights

#### Why use this feature?

Create school events, seek internal approval, communicate to parent/carers seeking both permission and payment via the Portal and App.

#### What this feature offers

Ability to create school events

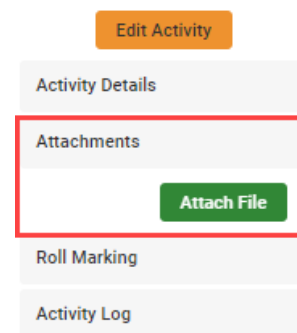
Ability to communicate school events with parents/carers for permission and payment

Ability to track progress of permissions and payments

Ability to select students, staff and parent/carer helpers who will be in attendance.

Sharing of information between the Activities module and Finance module – no double handling

### Attach supporting documents



1. Select Attachments in the right pane.
2. Select Attach File.
3. Give the attachment a name (for example, Park map).
4. Choose which users can see the attachment.  
For example, consider if it should be seen by parents/carers in the Portal or App, or just staff members.
5. Select the Cycle Instance applicable for the attachment, typically 'All.'
6. Choose the file and select Upload.

### Prerequisites

- Activity created. See [Activities #1 QRG](#)
- Approval workflow for Activities is in place.

### Activities

#### Select students

1. Go to Activities module.
2. Search for and select the activity.
3. Select Manage and choose Manage Student Attendees.
  - Select students to attend.  
You can do this via a cohort such as year or individually (right-hand side).
  - Select Save.
4. Select Manage and choose Manage Non-Student Attendees.
  - Complete the additional selection options for non-student attendees.
  - Select Save.

### Approvals – what happens?

Once an excursion proposal is complete, it is ready to go through the approval process.

Users with the associated approval permissions for your school's approval stage receive a notification that they need to approve their stage, and once all stages have been approved, the excursion status is updated to 'Ready to Run'.

## Publish to Portal and App

When an activity status is Ready to Run – meaning all approvals are in place, you can communicate the details to the Parent Portal via the Publish to Portal button.

1. Select Publish to Portal.
2. Review the activity dates.
3. Select what functions you want parents/carers to perform in the portal.
  - Give permission only
  - Make a payment only
  - Give permission and make payment.
4. If asking for payment, select the Fee Category, Internal Order and Cost Centre to use for the creation of each item.

You can create multiple line items to allow for activities that have both taxable and non-taxable components.

5. Choose whether to send a push notification to the Sentral for Parents app.
6. Review the permission due date and select a payment due date.
7. Review the event details and students being invited.
8. Select Publish.

## Need more information?

[Finance User Guide](#)