Sentral Finance – Fees – Standalone Fees for Activities

Separate permission and payment

Prerequisites

- **Activities module**

  Activity created, costed, approved and with students attached in the Activities module.

  See Activities #1 QRG and Activities #2 QRG

  > **Tip:** *When publishing to the portal, select 'Permission Only' when you want to separate the permission request from the payment request.*

- **Finance module**

  Fee structure in place, Fee Item.

Create fee

1. Go to Finance module | Fee Creation | Standalone Fee.
2. Enter a name for the Standalone Fee Run.

   This is a unique mandatory field – not visible to responsible parties. It is used as a filter in the Fee Register.

3. Select the date and due date.

   These are the dates communicated. They affect any reports used by your school.

Fee items

4. Select the fee items to charge.

   This automatically populates the additional costing elements – Fee Category, Internal Order, Cost Centre and Amount. However, you can override these if required.

5. If you have further charges to include, then continue to select Add Line Item as necessary.

6. Select a Group by option:
   - Contact – to create fees by grouped contacts
   - Student – to create fees by student.

7. Select a Bill to option:
   - Student – to bill fees to students.

     Fee line items will show which students the bills are linked to.
   - Contact – to bill fees at a contact level.

     The fee line items will not have any links to students.

Link to activity

8. Linking to an activity created in the Activities module?
   - If Yes, select the activity from the list.

     This allows any fee created to be viewed in the Activities module rather than the user needing to access this information via the Finance module.
   - If no, skip this field.

Select who to bill

Activity Groups ▼	Choose a value... ▼

☐ Include only students with permission

9. Select Activity Groups from the list, and then choose the activity.
10. Specify whether to include only students with permission.
11. Search for students.

12. Remove any students that shouldn't be billed.

13. Select Add Selected.

Update dollar amounts

14. Need to update the dollar amount for a student?

    ○ If Yes, select Edit () next to the student's name. Enter the new dollar amount.

    ○ If no, skip this step.

> ⚠️ **Warning:** *You can only update the dollar amounts if there is a single fee item, not multiple. The system will allow you to change the total fee, but it will not be reflected when the Fee is created.*

Preview fees

15. Select Generate and then review the fees that will be created.

16. Select Details to view the details for a fee.

> ℹ️ **Note:** *You can export data to a CSV file for analysis and calculation.*

17. Select Run to create the fees.
    Sentral automatically displays the Fee Register for the Standalone Fee Run post creation.

Next steps

- For information about discounts, see the Subsidies QRG and Fee Adjustment QRG.
- For information about publishing to the Portal, see the Publish to Portal QRG

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