# Sentral Finance – Fees – Standalone Fees for Activities



# Separate permission and payment

## Key highlights

#### Why use this feature

If your school has discounts to apply, then you could use separate permission and payment to apply the subsidies before publishing to the Portal.

If your school does not have discounts, then you could use the Permission and Payment option as a single step.

#### What this feature offers

Ability to create school events and seek internal approval

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

Ability to track progress of permissions and payments

Information is shared between the Activities module and the Finance module – no double handling

# 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.
- 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.

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.

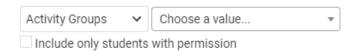
This automatically populates the additional costing elements – Fee Category, Internal Order, Cost Centre and Amount. However, you can override these if required.

- 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.
  - o If no, skip this field.

#### Select who to bill



- 9. Select Activity Groups from the list, and then choose the activity.
- 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.

# Need more information?

Finance User Guide

# Update dollar amounts

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

- o 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

- Select Generate and then review the fees that will be created.
- 16. Select Details to view the details for a fee.



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

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 <u>Subsidies</u> QRG and Fee Adjustment QRG.
- For information about publishing to the Portal, see the <u>Publish to Portal QRG</u>

