

Sentral Finance – CSV Bulk Updates



Financially responsible contacts

Key highlights

Why use this feature?

Financially responsible (FR) contacts need to be established in Sentral to enable the creation of fees and charges for students. This function supports the bulk updating of contact data for responsible parties for payments on behalf of students.

What this feature offers

Ability to export data, make changes and import into Sentral for students' financially responsible contacts.

Data from NSW DoE

Sentral automatically creates a finance contact based on data marked as 'financially responsible' that is provided by the NSW DoE.

- You can amend this as required in Sentral.
- You can view the contacts that have been created for a student in their student profile.
- You can also adjust the users that are marked as financially responsible in bulk via a CSV, making changes to the associated contacts.

Contact adjustment via CSV bulk updates

1. Go to the Finance module
2. Select Finance Setup below the left menu.
3. Select Imports in the left menu and choose Export/Import Billing Responsibilities.
4. Select Generate Student Billing Responsibilities Document.



Tip: Save a copy of this CSV locally as a backup.

5. Review the document.
 - a. Ensure only parents that should have financial responsibility have a 'Y.' populated in the column header 'is_financially_responsible.'
 - b. If applicable, specify the 'fee_split' percentages.
6. Save the updated document locally on your device or network.

7. Under Export/Import Student Billing Responsibilities,
8. Upload the saved CSV file and select Import.
9. Review the students' noted contacts (financially responsible) to ensure the desired result was achieved.

Contact types recap

Household

One or more contacts from the same household with a shared responsibility for a fee.

Contact

A single contact that has been assigned a percentage of the responsibility for a student.

- The student needs to have 100% of their responsibility assigned to one or more contacts before you can save.
- Sentral creates a contact for each financially responsible party that is assigned a percentage of responsibility.
- A single parent being given 100% responsibility is classified as a Contact type.

Group

More than one contact, from different households, with a shared responsibility for a bill.

Example

Mum and Dad have split up and live in different houses, but the school won't split their bill. Mum and Dad need to sort the bill out between themselves.

Activities

Allows you to have a different debtor for activities. However, we do not encourage use of this contact type.

Adhoc

This is a non-student related contact.

Example

Hiring the hall out to the local dance group.

Need more information

Finance User Guide

For details on setting up exclusive portal fees, see the [Contacts Register QRG](#)

