Sentral Finance – Standalone Fee

Creating a standalone fee

Key highlights

Why use this feature?

Easy way to create fees for a cohort independently of the fee structure in place

Easy to select and de-select students

Ability to edit student and single line item amounts individually if required – all in the same screen.

Ability to select one item or many items, use prepopulated costing elements and amounts, with an override if needed.

What this feature does not offer

Automatic discounts – fee amounts need to be manually adjusted if required for an individual student

Sibling discounts – these need to be manually applied to the fee amount

Pre-requisites

- Fee structure
- Fee item

Create fee

1. Go to Finance module | Fee Creation | Standalone Fee.

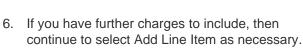
 Enter a name for the Standalone Fee run.
 This is a unique mandatory field that is used as a filter in the Fees Register.

- 3. Do you want to use this as the fee reference that parents or responsible parties see?
 - o If Yes, leave the checkbox selected.
 - If No, de-select the checkbox and enter a different reference.
- 4. Select the date and due date.

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

5. 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.



- 7. Select options for:
 - Group by
 - o Bill to.

Typically, both fields are student centric.

Link to activity

- 8. Linking to an activity created in the Activity module?
 - If Yes, select the activity from the list.
 Select this option when the fee is to accompany an activity created in the Activity module. You can view the fee in the Activities module rather needing to access the information via the Finance module.
 - o If No, skip this field.
- 9. Academic period defaults to the current year.

Select who to bill

- 10. Select students to include. Options include:
 - o School Years
 - o Roll Classes
 - o Classes
 - Activity Groups
 - Student Flags
 - Individual student or contact using Search Student and Search Contacts on the right if outside of the current selected criteria.



Note: You can create a non-student contact on the fly by selecting the Add non-student Contact link. This creates an Adhoc Contact record.

- 11. Search for students.
- 12. Remove any students that shouldn't receive the fee.
- 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.

Preview fees

- 15. Select Generate and then review the fees being created.
 - Select Details to view the details of a fee.



Note: You can export data to a CSV file for ease of use, analysis and calculation.

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

Next steps

If you're using the Portal, see Publish fees to Portal QRG

Need more information?

Finance User Guide

