Sentral Finance – Statement of Account

Statement of Account

Key highlights

Why use this feature?

Provides a contact with their Statement of Account, which details all fees associated with the student

What this feature offers

Ability to see all related fee transactions for students linked to a contact

Ability to create a Statement of Account on-demand.

Pre-requisites

- Fees created
- Credits
- Previous (EBS) transactions

Via student search

1. Go to the Finance module.
2. Search for the student via the search box on the top right.
3. Select the student.

   The Student Overview screen displays.
4. Under Contacts Responsible for the student:
   a. Check the Status column to determine the 'active' contact.
   b. Select the 'active' contact name link.

   The Contact Overview screen displays.
5. Under Statement of Account in the right pane, select the year from the 'Generate a statement for' list.
6. Select Generate.

   The generated Statement of Account displays in a new browser tab. You have the option to download or print if required.

Via contact search

1. Go to the Finance module.
2. Search for the contact via the search box on the top right.
3. Select the contact.

   The Contact Overview screen displays.
4. Under Statement of Account in the right pane, select the year from the 'Generate a statement for' list.
5. Select Generate.

   The generated Statement of Account displays in a new browser window. You have the option to download or print if required.

Need more information?

Finance User Guide

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