

Sentral Finance – Students register



Key highlights

Why use this feature?

Search for finance data from a student's perspective

What this feature offers

Ability to search for individuals or cohorts based on specific criteria

Ability to view associated Contact information

Ability to view student associated transactions from fees to payments, subsidies and credits

Search students

1. Go to Finance module | Registers | Students Register.
2. Do one of the following:
 - o Enter the student's name and select Search.
 - o Use the filter options to refine the search for a student or cohort and select Search.
3. Select the student via their name.
The Student Overview screen displays.

Student overview



Note: The Student Overview screen provides a mix of read only information
Note: The Student Overview Screen

Set Flags

Show Sibling Details

Show Classes and Subjects

Set flags

To add a flag to a student:

1. Select the applicable flag from the dropdown list.
2. Select Add Flag to insert.
3. Select Save to complete.

Show sibling discounts

Used to view read only details of any associated siblings.

Show classes and subjects

Used to view read only details for a student.

Fields

1. Do any of the following:

Fee Group

Created by the Cash Desk migration to Sentral

- o Update as required.

Flag Based Discount Option

Set by default.

- o Change at the student level as required.

Overall Discount Option

Set by default.

- o Change at the student level as required.

Fee Matrix (view only)

Lists potential fee types that could be billed to a student. Shows all Fee Types accessible for the Fee Group grouped by category.

2. Select Save to apply any changes.

Contacts responsible for student

Displays details of the contacts associated with the student – both active and old.

Set Up Contacts

Used to review and administer changes to the contacts associated with a student - who receives fee requests.



Tip: Use this option to cater for split families where separate fees are required to be issued.

Set Up Activities Contacts

Used to create contacts for fees associated with a student's activities.



Warning: Do not use this option.

Pay outstanding



Note: This menu option is only available if the student's Contact is the same for all outstanding fees. Use the Fees option where different Contacts apply.

To pay outstanding fees or items:

1. Go to Finance module | Registers | Students Register.
2. Search students.
3. Select Pay Outstanding in the left menu.
The associated Contacts Receive a Payment screen displays – showing all outstanding fees.
4. Do one of the following to make a payment:
 - Select Pay All.
 - Select individual fees/items.Outstanding credit and subsidy balances display (if applicable) – and you can allocate these at the time of payment.

Payment requests (Online bills)

Displays all Portal related payment requests for a student.

1. Go to Finance module | Registers | Students Register.
2. Search students.
3. Select Payment Requests in the left menu.
The Online Bills screen displays – showing all online payment requests.
4. Select the Details button to display the fee.
5. Select the Fee No to go to the Fees Register and view further information and make a payment.

Subsidies

To view subsidies applicable and allocate to outstanding fees.

1. Go to Finance module | Registers | Students Register.
2. Search students.
3. Select Subsidies in the left menu.
View subsidy data (if applicable).
4. To allocate or remove:
 - a. Select Allocated to Outstanding Fees to apply as required.
 - b. Select Remove if no longer valid.

Payments

To view all payments processed for the student:

1. Go to Finance module | Registers | Students Register.
2. Search students.
3. Select Payments in the left menu.
4. Apply filters to refine search results.
5. To export payments in bulk:
 - a. Select all payments via the top Document No checkbox.
 - b. Select Actions and choose Export Payments to export payments in bulk.
6. Do any of the following for payments linked to a student.
 - a. Select Details next to a payment to view additional information about the payment and linked fee.
 - b. Under Linked Fee, select the linked fee to view fee details in the Fees Register.
 - c. Select the dropdown next to Details to:
 - Print Receipt.
 - Select Email receipt.
 - Select Reverse payment.
 - Select Request refund to initiate a refund (processing) request.
 - Select View Payment History.

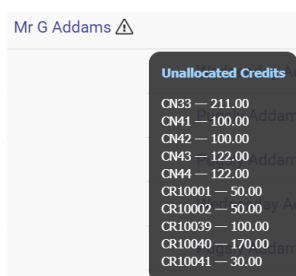
Fees

To view all fees created for a student, along with the fee status:



Tip: It's an easy way to see outstanding fees for a student at a glance.

1. Go to Finance module | Registers | Students Register.
2. Search students.
3. Select Fees in the left menu.
4. Do any of the following:
 - a. Hover over the Unallocated Credits icon (△) next to the Contact Name to view credit available for allocation.



- b. Select the Portal view icon (🔗) to view details of an associated Portal user.
- c. Select Details next to a fee to view the fee data.

This also enables you to Reverse Payment for paid transactions (if required).
- d. Select the Action dropdown to:
 - Adjust a Fee Amount – Allows the balance of any fee to be void without creating a credit where partial payment has occurred.
 - Cancel Fees – to void the fee and where paid, create corresponding Credit for use or refund.
 - Receive a Payment – to make payment against a fee.
 - Publish to Portal – to send payment requests to the Portal and App.
 - Send Payment Requests – to communicate the request to the parent or carer.

- Unpublish from Portal – to remove the request from the Portal.

- e. Select the dropdown next to the Details button for options to:
 - Print Fees – creates a print ready version of the fee.
 - View Contact's Credits – displays the Credits menu.
 - View Contact's Overpayments – displays the Overpayments menu.
 - View Fee History – displays any associated transaction history for the fee.

Credits

To view all credits for the student:

1. Go to Finance module | Registers | Students Register.
2. Search students.
3. Select Credits in the left menu.
4. Using the filter options, refine the search and re-run if required.
5. Select Details to view the credit information.

If applicable, Refund Details display where the funds have been requested or returned to a contact.
6. Select the dropdown next to the Details button for options to:
 - Allocate to Outstanding Fees – this takes you to outstanding fees for the allocation.
 - Request refund (processing) – request a refund via this option. Approval processing to follow.
 - View Credit History.

Need more information?

[Finance User Guide](#)