

Sentral Finance – Contacts register



Key highlights

Why use this feature?

Search for finance data from a student's contact perspective

What this feature offers

Ability to search for individual contacts or cohorts based on specific criteria

Ability to view associated student data

Ability to view the associated transactions from fees to payments, overpayments and credits

Ability to drill down and view the fees

Search contacts

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



Note: The Contact Overview screen provides a mix of read only data and elements that can be maintained.

Contact overview

Set Flags

Setup Exclusive Portal Fees

Edit

Set flags

To add a flag to a contact:

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

Setup Exclusive Portal Fees

Used where contacts have split fees/billing requirements.

Edit

Not applicable to NSW Department of Education schools.

Show Sibling Details

Displays under Linked Students if applicable. Used to view read only details of any associated siblings.

Statement of account

To create a Statement of Account:

1. In the right pane, under Statement of Account, specify the year.
2. Select Generate.
3. (Optional) Select Add a new not. Enter text and select Save.

Pay outstanding

To pay outstanding fees or items:

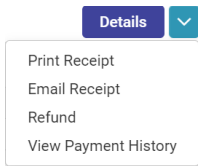
1. Go to Finance module | Registers | Contacts Register.
2. Search contacts.
3. Select Pay Outstanding in the left menu.
The Receive a Payment screen displays – showing all outstanding fees.
4. Do one of the following to make a payment:
 - o Select Pay All.
 - o Select individual fees/items.Outstanding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

Payments

To view all payments processed for the contact, including any overpayments:

1. Go to Finance module | Registers | Contacts Register.
2. Search contacts.
3. Select Payments in the left menu.
4. Apply filters to refine search results.

5. Do any of the following:
 - a. Select Actions and choose Print Receipt (with a selected Document No).
 - b. Select Actions and choose Export Payments to export payments in bulk.
6. Do any of the following for payments linked to a contact.



- 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 Refund to initiate a refund (processing) request
 - Select View Payment History.

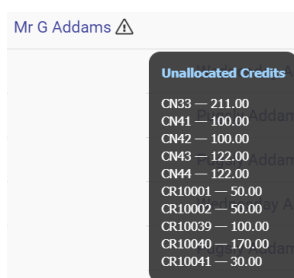
Fees

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



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

1. Go to Finance module | Registers | Contacts Register.
2. Search contacts.
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 dropdown next to the Details button for options to:
 - Print Fees – creates a print ready version 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.
- e. Select the Action dropdown to:
 - Set Status to Draft – not required for NSW DoE schools.
 - Set Status to Authorised – not required for NSW DoE schools.
 - Set Status to Submitted – not required for NSW DoE schools.
 - 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.

Credits

To view all credits:

1. Go to Finance module | Registers | Contacts Register.
2. Search contacts.
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.
 - Refund (processing) – request a refund via this option. Approval processing to follow.
 - View Credit History.

Overpayments

To view all overpayments and the remaining credit balance available:

1. Go to Finance module | Registers | Contacts Register.
2. Search contacts.
3. Select Overpayments in the left menu.
4. Select Details to view the credit information.
If applicable, a Fee Allocation section displays details of where credits have been allocated.
5. Select the dropdown next to the Details button for options to:
 - Allocate to Outstanding Fees
Displays outstanding fees for the allocation.
 - Initiate a refund (processing) request – with an Approval workflow to follow.

Subsidies

To view any subsidies associated with a contact.



Note: *This is not generally applicable to NSW DoE schools.*

Need more information?

[Finance User Guide](#)