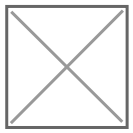
Assign Fee And Request Money



Before you can assign fees to students and receive payments, you must complete the initial settings. Learn how to set the billing items.

How to Assign Fees

To assign fees to students, navigate to **Main Menu >>Billing and Fees >>Assign Fee and Request Money**

Search and select the students and click **Assign Fee.** On the screen, you will see the names of the selected students. You can remove anyone by clicking on the "-" sign.

- Enter the **Due Date** for the charges you are about to enter
- Turn on the **Create Invoice** switch if you want to generate an invoice for the students
- Select the **Fee Type** from the drop-down menu. The **Description** will be auto-filled if you have entered it in settings. If you have not, you can enter the description manually
- Select the **Quantity** and the **Amount** will be auto-filled
- To delete a line item, click on the "-" sign
- To add multiple fee types, click on **+ Add Another Fee Type**
- Finally, click **Assign Fee** to assign the fee to the selected students.

Fees assigned to students will show on the Assign Fee and Request Money page. You will be able to receive payments directly from this page by clicking on **Receive Payment**. Under**** the**Action** menu, you will be able to **Print an Account Statement** for the student.



How to Deposit Funds

Students receive funds from many sources for education expenses. These funds can be deposited as a credit mount from the student’s general ledger screen.

1. Click on a student’s name to open the ledger
2. Click **Fund Deposit**



1. Fill in the**Amount**
2. Select the **Deposit Type**
3. Enter the **Deposit Date**
4. Enter the **Fund Source** , examples would be Scholarships, Grants, etc.
5. Enter **Funding Reason**
6. Click **Submit** to save

You will see that the Deposit amount will show on the transaction detail with the transaction date as well as on the account header.



You can edit the deposit transaction by clicking on **Edit** under the **Action** menu

How to Receive Payments

To receive payments and record them, navigate to the **Assign Fees and Request Money** screen. Here, you will see the list of students with open and overdue balances. Click on **Receive Payment** link to receive payment for outstanding fees of that student.



When the payment recording screen opens, you will be able to receive payments for a particular invoice, or a charge or all of the outstanding fees. Click **Submit** to save.



What is a Student Ledger?

The student ledger is an useful screen where it shows all the transactions between the student and the school. To get to the ledger, navigate to **Assign Fees and Request Money** screen and click on a student's name. The ledger will display with transactions if there are any.

At the top, the overview of the student's account is presented as given below:



Within the Date drop down, you have the ability to filter the transactions by preset days or by custom date range.

Below the overview bar, there is a search, filter, download to Excel and print options providing the following features:

1. Ability to search by fee type or amount
2. Ability to select the columns to display on the grid
3. Ability to print a statement of account
4. Ability to download the transactions as an Excel sheet

Under the **Action** menu, you can **Receive Payment** for a particular transaction. The triple dots menu offers additional features like:

1. Ability to **Send Reminder** about an outstanding charge
2. Ability to **Print** all the payments against a charge
3. Ability to **Void** a charge
4. Ability to **Waive** a charge



The **Transaction** column displays small icons as a visual queue for the type of transactions that were recorded.

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