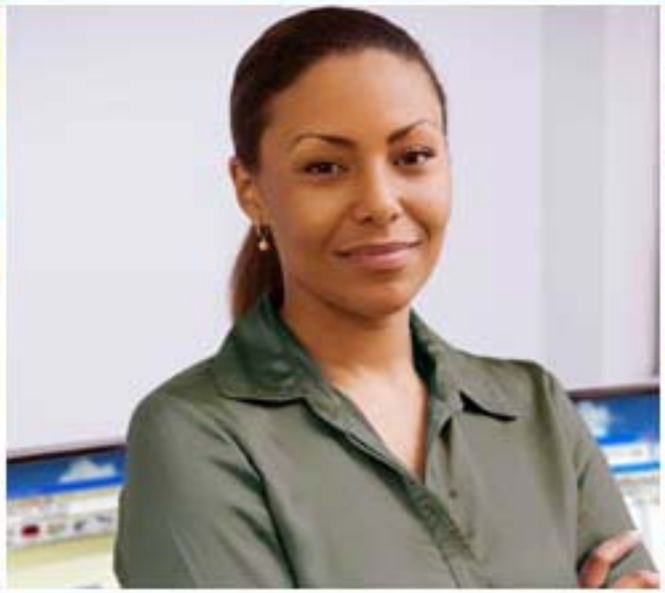

Texas Skyward User Group Conference

Fee Management: One District's Use

Felecia Jamerson

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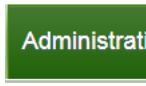
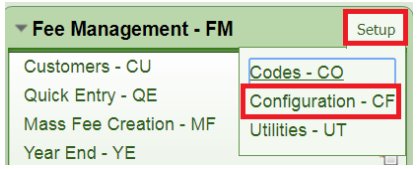
Fee Management One District's Use

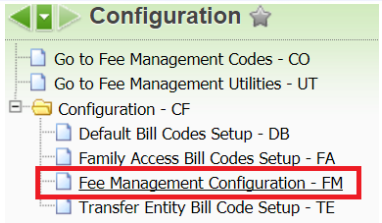
This session will provide new users an overview of how one district uses the Fee Management module.

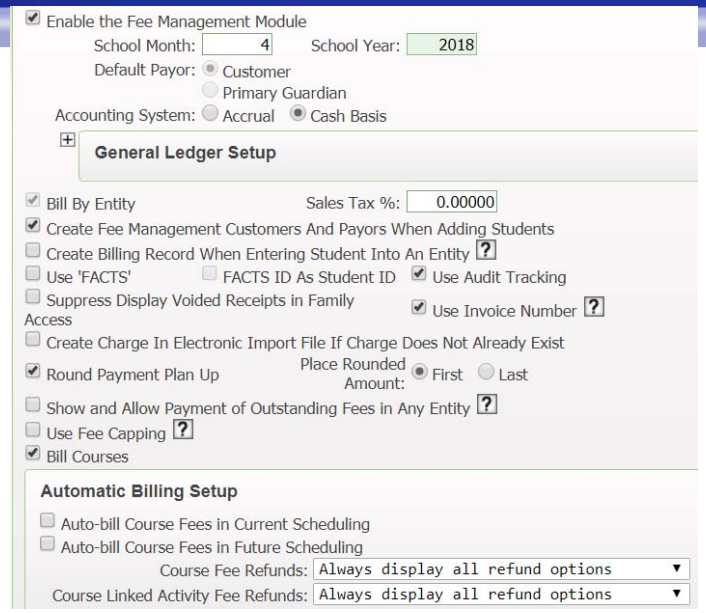
- District Configuration
- Default Bill Code Setup
- Create a Bill Code
- Display Customers (Students)
- Add an Individual Charge (Fee)
- Add an Individual Receipt (Payment)
- Quick Entry Fee and Payment (by student)
- Mass Fee Creation
- Reports

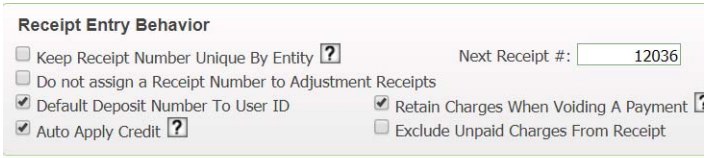
District Configurations
WS\AD\FM\PS\CF\FM

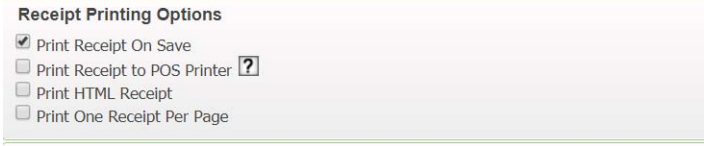






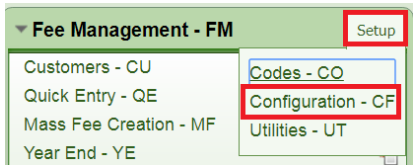


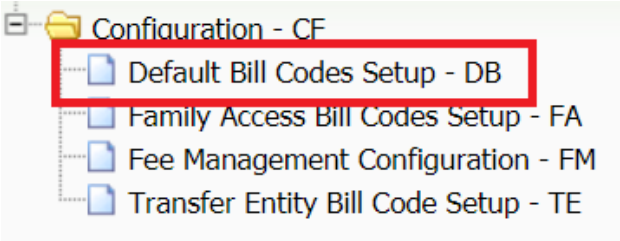


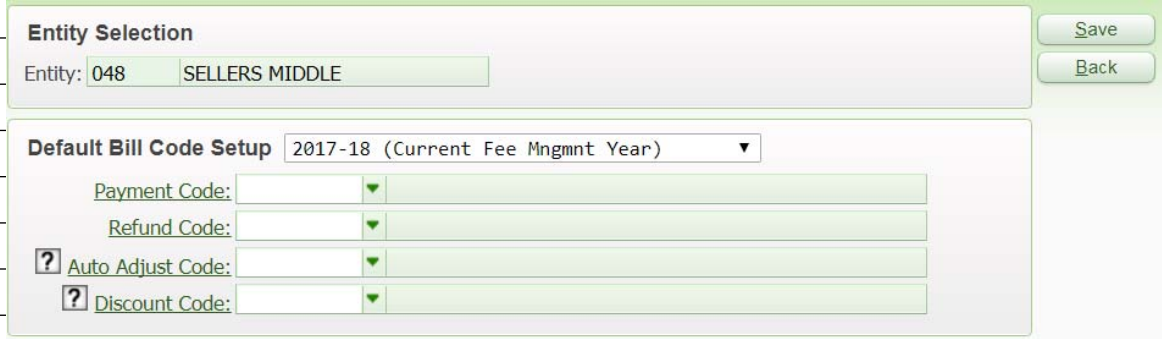


Default Bill Code Setup
WS\AD\FM\PS\CF\DB

Administration







Creating a Bill Code
WS\AD\FM\PS\CO\BC

Administration

Fee Management - FM | Setup

Customers - CU
Quick Entry - QE
Mass Fee Creation - MF
Codes - CO
Configuration - CF
Utilities - UT

Codes - CO
- Account Master - AM
- Activity Fees - AF
- Affiliations - AC
- Bill Codes - BC
- Course Fees - CF
- Fee Groups - FG
- Graduation Year Fees - GY
- Payment Plans - PP
- Prorate Schedules - PS
- Tuition Types - TT

Bill Code Maintenance

Save
Back

* Bill Code:
Entity: 048 - SELLERS MIDDLE
* School Year: 2017-18
* Bill Code Type: G - General
* Short Description:
* Long Description:
Bill Amount: 0.00
- This fee can be waived
- Require full payment in Family Access
- Use payment plan

Status: Active

Discounting

Prorate Schedule:
Free Code:
Reduced Code:

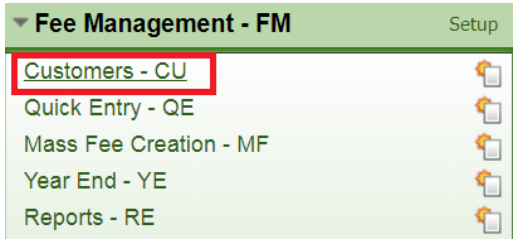
Account Distribution

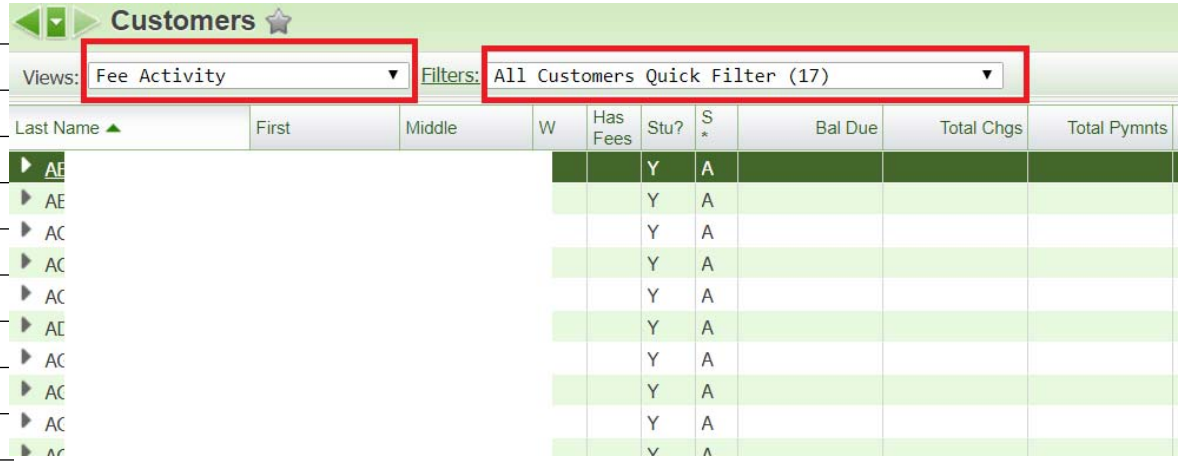
Account Distribution

Maintain Percents

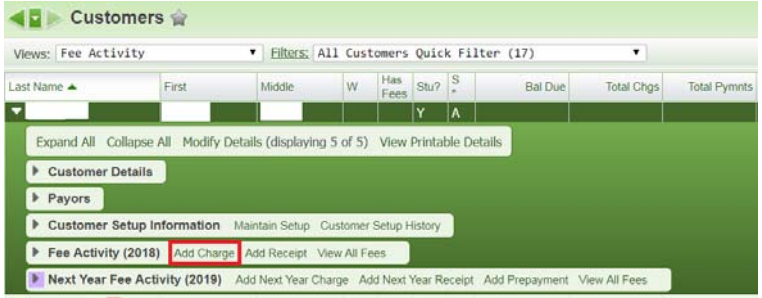
Account Number	Percent	Apply Diff
No records available		

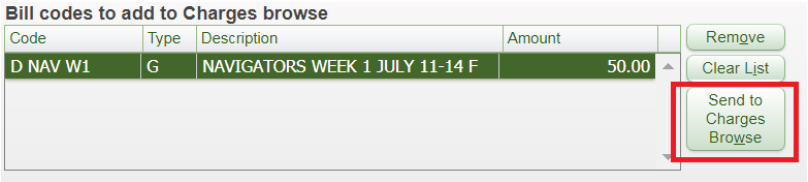
Display Customers (Students) WS\AD\FM\CU

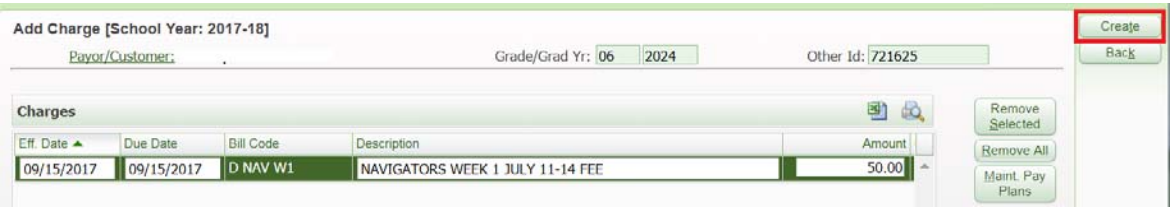




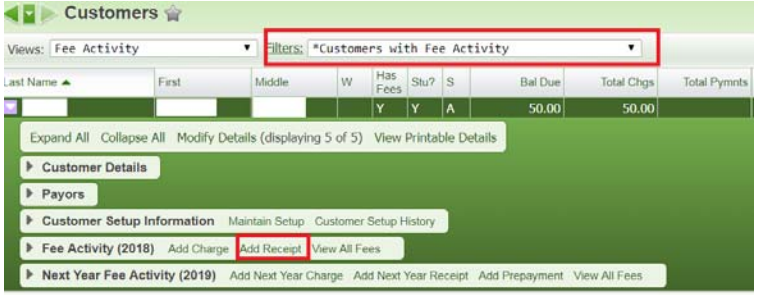
Add an Individual Charge (Fee)
WS\AD\FM\CU

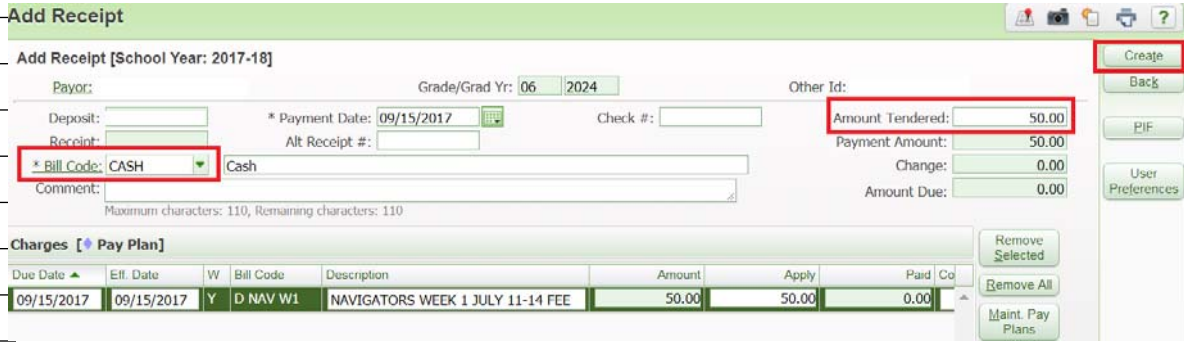


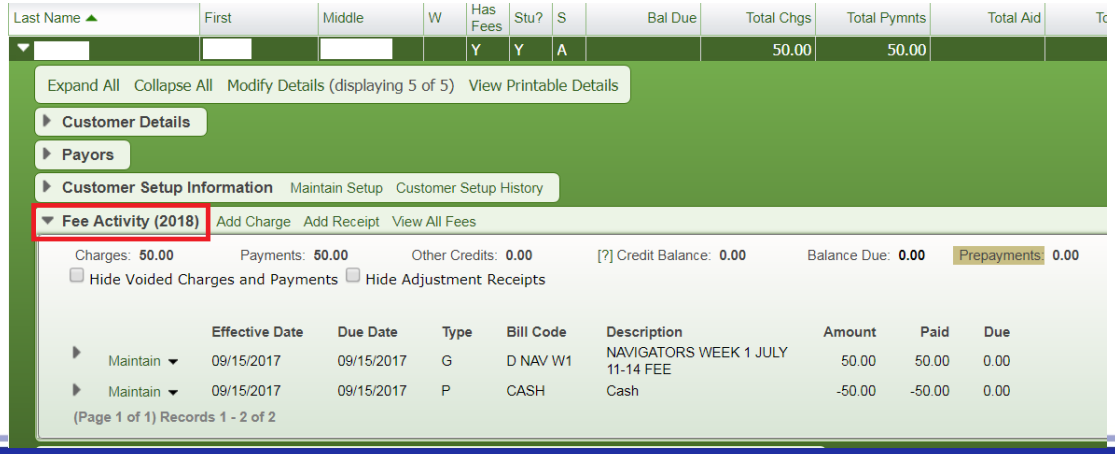




Add an Individual Receipt (Payment) WS\AD\FM\CU

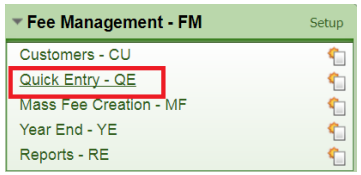


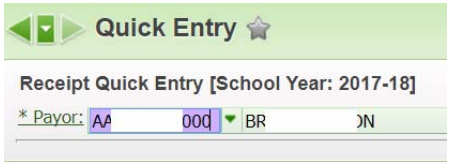


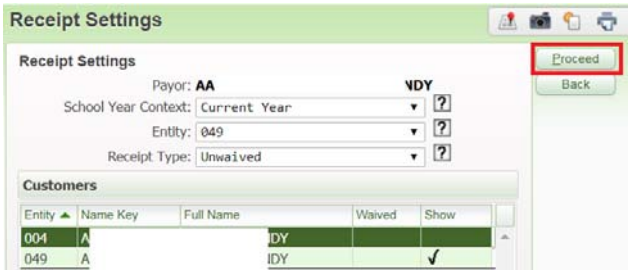


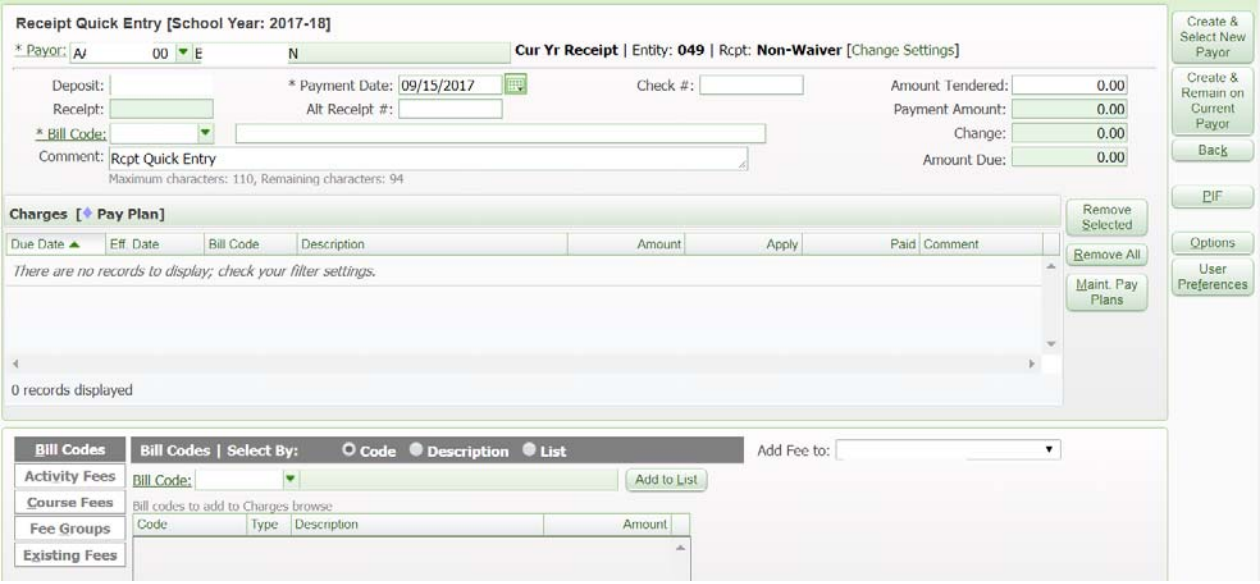
Quick Entry Fee and Payment (by Student)
WS\AD\FM\QE

Administration









Mass Fee Creation
WS\AD\FM\MF\GF

Administration

Fee Management - FM Setup

- Customers - CU
- Quick Entry - QE
- Mass Fee Creation - MF
- Year End - YE
- Reports - RE

Mass Fee Creation

- Mass Fees - MF
  - Activity Fees - AF
  - Course Fees (Create) - CF
  - Course Fees (Delete) - DF
  - Credits and Waivers - CW
  - Food Service Balance Fees - BF
  - General Fees - GF
  - Batch Entry - BE
    - Enter Fees - EF
    - Enter Payments - EP

Mass Process General Fees

This process will mass create or delete selected general fees for all students within ranges. Only students who are customers within entity 049 will be considered. The **Student Ranges** fields will filter students according to their default entity. A preview of fees to be created/deleted will be shown prior to processing.

Run | Run Using Processing List | Reset | Back

Processing Options

Create/Delete Records:	Create
Create New Fees:	Only if fees DO NOT exist
Mass Process General Fees For:	Current Year (2018)
Process:	Individual Bill Codes

Student Ranges

	Low	High
Default Entity:	049	049
Student Key:		ZZZZZZZZZZZ
School:		ZZZZ
Entry Date:	01/01/1900	12/31/2999
Grade/Grad Yr:	9999	0000
Homeroom:		77777
Advisor Key:		ZZZZZZZZZZZ
Registration Date:	01/01/1900	12/31/2999
Effective Date:	09/15/2017	
Due Date:	09/15/2017	

☐ Use Registration Date

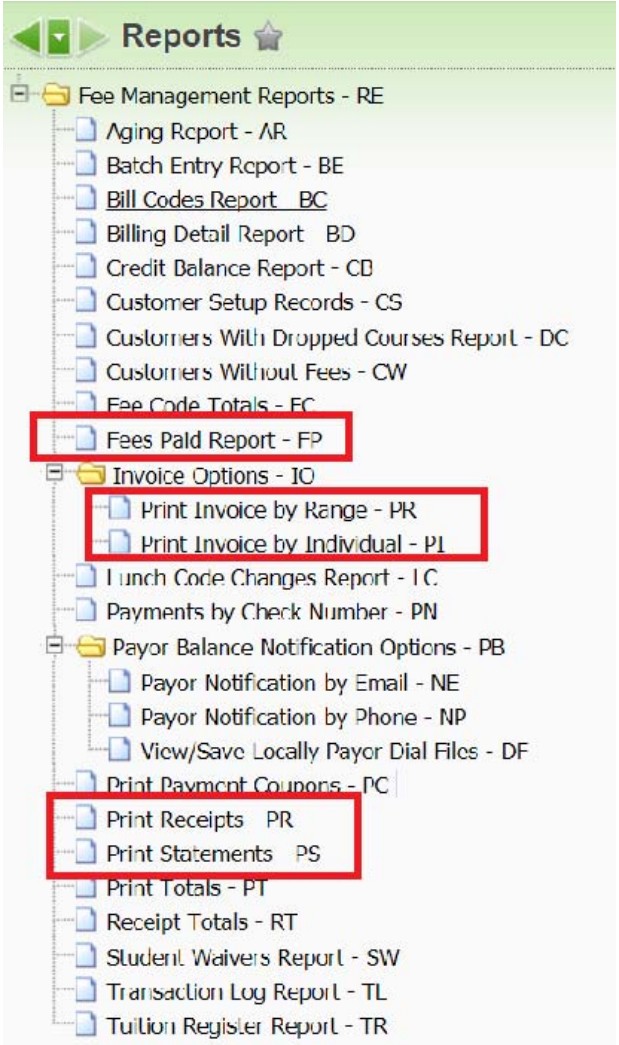
Student Status: Active

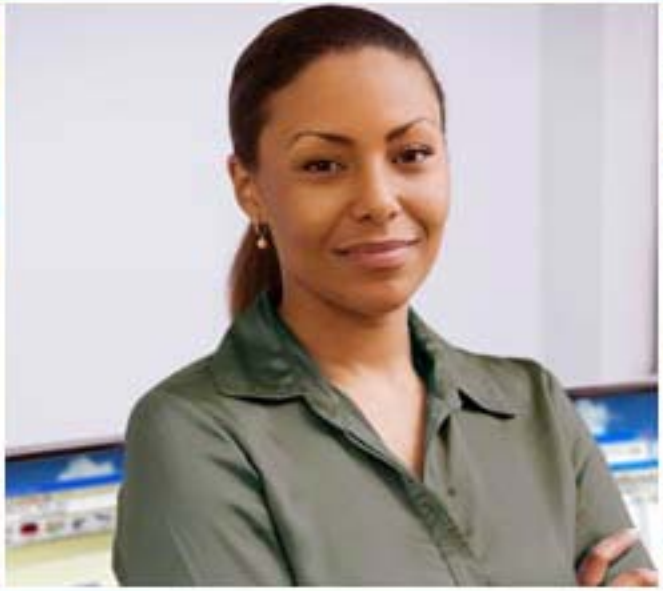
Bill Codes

Bill Codes

D VEX W1 - D VEX W1

Fee Management Reports
WS\AD\FM\RE





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THANK YOU FOR ATTENDING!

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