CampusLogin | Students

Finance Training Manual

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1. **Searching Students**
   a. You can find the search tools under the "Contacts" heading on the left navigation
   b. To find a lead by name, email, or telephone use "Quick Search"
   c. To query your database by any field on your lead profile use the "Advanced Search"
   d. You can click the "View" button to go to the leads profile, or the "Finance" icon to go straight to the finance tab
2. **Accessing the Finance Tab**
   a. Once you are on any students profile. You will see a link to their finance tab towards the right of the page. If you do not have access to the finance tab please speak to your schools administrator.
3. **Program Information**
   a. In the "Program Information" section at the top of the finance tab, you will see all of the programs that the student is registered in, as well as all past registrations.
   b. For modifying the students program listing please see the Registrar training manual
   c. Beside each program you are able to view the programs invoice in the "Invoice" column
4. **Program Invoice**
   a. The program invoice is created by default based on the settings associated to each program. The program invoice is able to change from start date to start date as prices change.

b. If you do not enter a default invoice for your program, then the "View" invoice button will instead say "Create" and you will be able to manually create an invoice for each student

c. If you do not enter fees on the program level, but enter course fees only. Then the invoice will be a sum of all the course fees

5. **Make an Invoice Adjustment**

a. In the "Options" section you are able to "Make an Invoice Adjustment" to your default invoice. If you wish to add to the invoice you can make a "Positive" adjustment. And if you wish to remove from the invoice you can make a "Negative" adjustment. You are also able to add as many line items as you wish, in addition to "Tuition", for things like Books, Materials, Supplies, Uniforms, etc.

6. **Receive Payment/Disburse Refund**

a. Once your invoice is created your able to make payments towards the invoice, or enter any refunds or credits. You can click the "Receive Payment/Disburse Refund" button under the "Options" heading.

b. When entering a transaction, in the Program dropdown, you are able to select which program the transaction is related to, if there are multiple programs associated to the student.   The "Type" drop down lets you select a payment, refund, or credit. In the "Amount" field you are able to select which line item the payment should be applied to. The "Payment Method" drop down shows all your custom payment methods for reporting purposes, and the "Status" lets you track "Successful" payments, which will be applied to the invoice, or "Unsuccessful" payments, that will not be applied to the invoice, but will show that the student attempted payment.

7. **Transaction History**

a. In the "Transaction History" section you will see all of the transactions associated to the student (invoices, payments, refunds, credits).

b. The "Transaction History" is sorted by program, so you can see all the transactions by program.

c. You are able to generate a receipt for each transaction using the "Receipt" column

8. **Documents**

a. In the documents section, you can generate documents on the program level

b. The program invoice, a statement (which will show a summary of all payments) and the tax form

9. **Earned/Un-Earned Revenue**

a. You are able to view the revenue that has been earned, and that you have yet to earn in the "Earned/Un-Earned Revenue" section

10. **Setup a Payment Plan**

a. Payment plans are used when the student is making payments directly to the school. If the payments are coming from a third party then you should use the student funding feature (see #11 below)

b. You are able to enter a monthly payment plan, quarterly payment plan or a custom payment plan by student

c. You are able to create custom payment plans in the payment plan admin tool. Any custom payment plans will also show in the payment plan drop down, so you can easily apply popular payments plan to multiple students

d. You are also able to associate a payment plan to a program/start date/group, so the payment plan is added automatically to all students, and you do not have to add it one student at a time. If you wish to associate a payment plan to a program/start date/group, please speak to your school's administrator

11. **Enter Student Funding**

a. Student funding is used to track payments from third parties

b. You are able to list all of your funding sources in the funding admin tool

c. When you click the "Enter Student Funding" button, you are able to select the funding provider, the date the funding is supposed to be received, as well as the funding amount

12. **Payment Plan/Student Funding**

a. All payments plan and student funding will show in the "Payment Plan/Student Funding" section at the bottom of the finance tab. You will see all scheduled payments, and funding by date. There is a default status of outstanding for all payments, and when the student makes a payment, or the funding is received, you are able to select the "Enter" button in the "Payment" column. That will allow you to track that each payment has been made, and to easily see what is outstanding

b. All payment plan and funding transactions will also appear in the "Transaction History" section