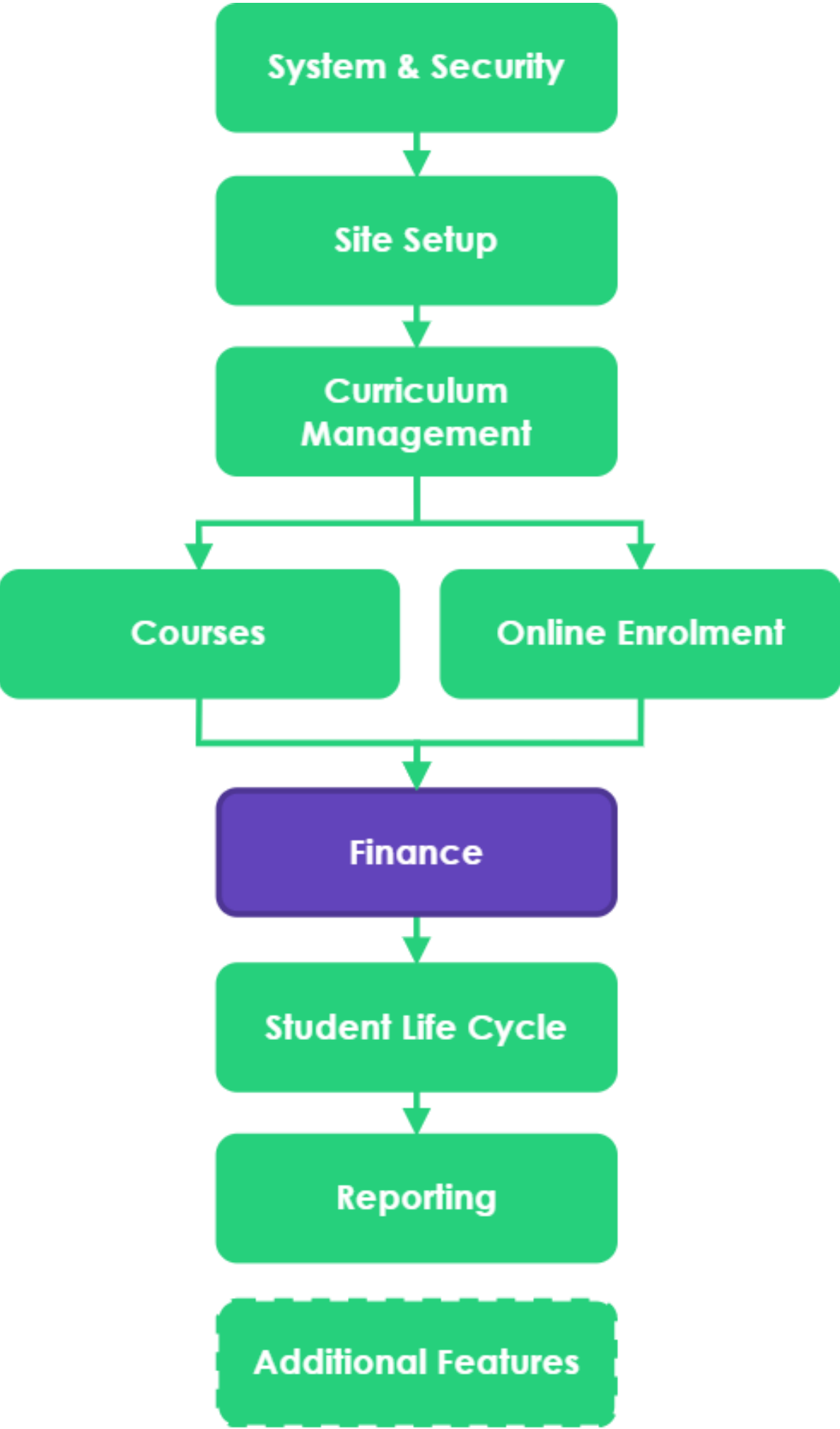


Topic 6 - Finance



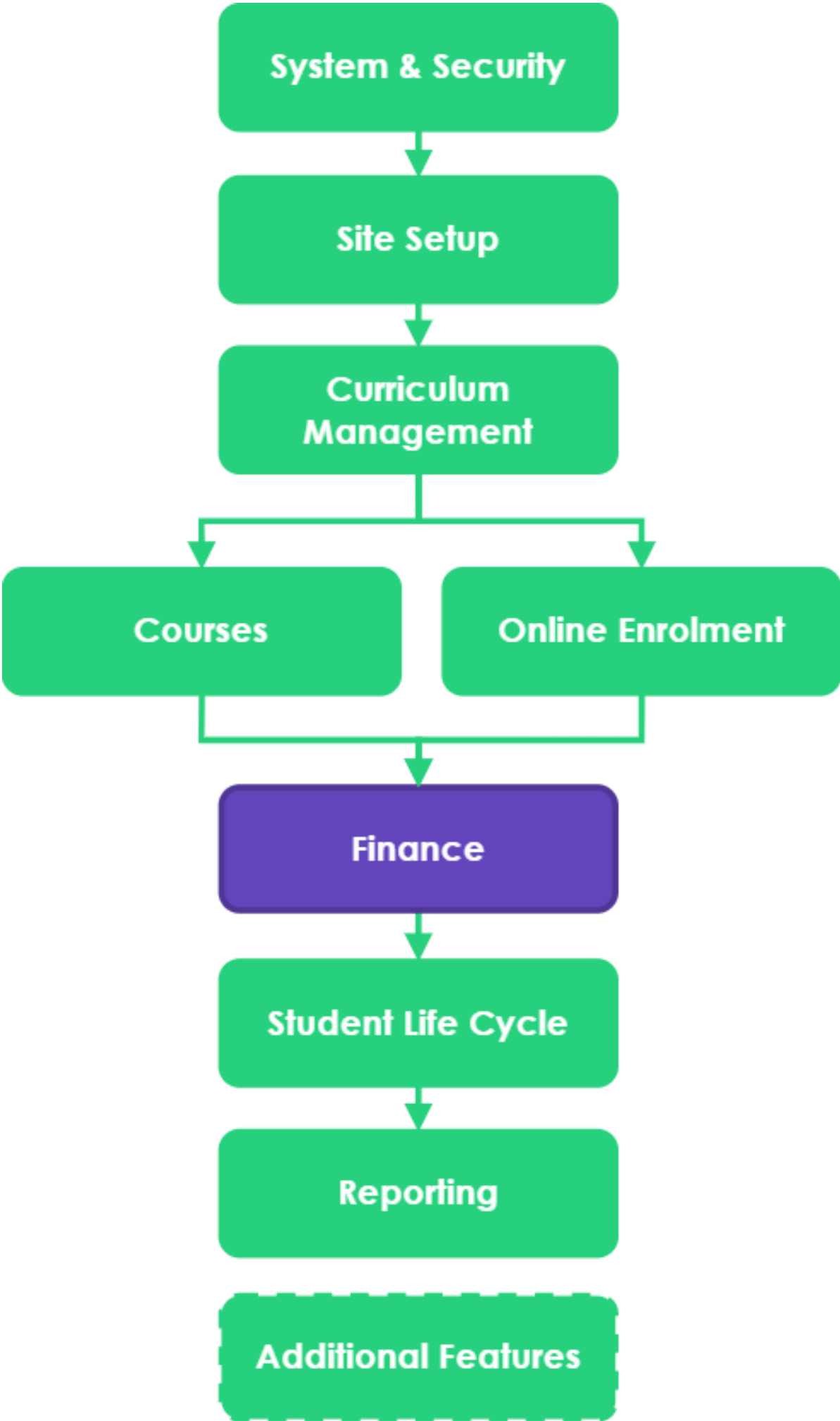
Agenda



Topics Covered

- 1 Finance Preferences
- 2 Finance Options
- 3 Party Invoices (Quote, invoices, payments, Refunds and credit notes)
- 4 Course form payments
- 5 Payment options for bulk enrolments
- 6 Smart Fees
- 7 Finance Hub

Agenda



Learning Objectives

- 1 To be able to create quotes, invoice and payments with the system
- 2 To be able to create and link a smart fee library to a course
- 3 To understand how to setup payment options for a course
- 4 To understand how to access the Finance Hub

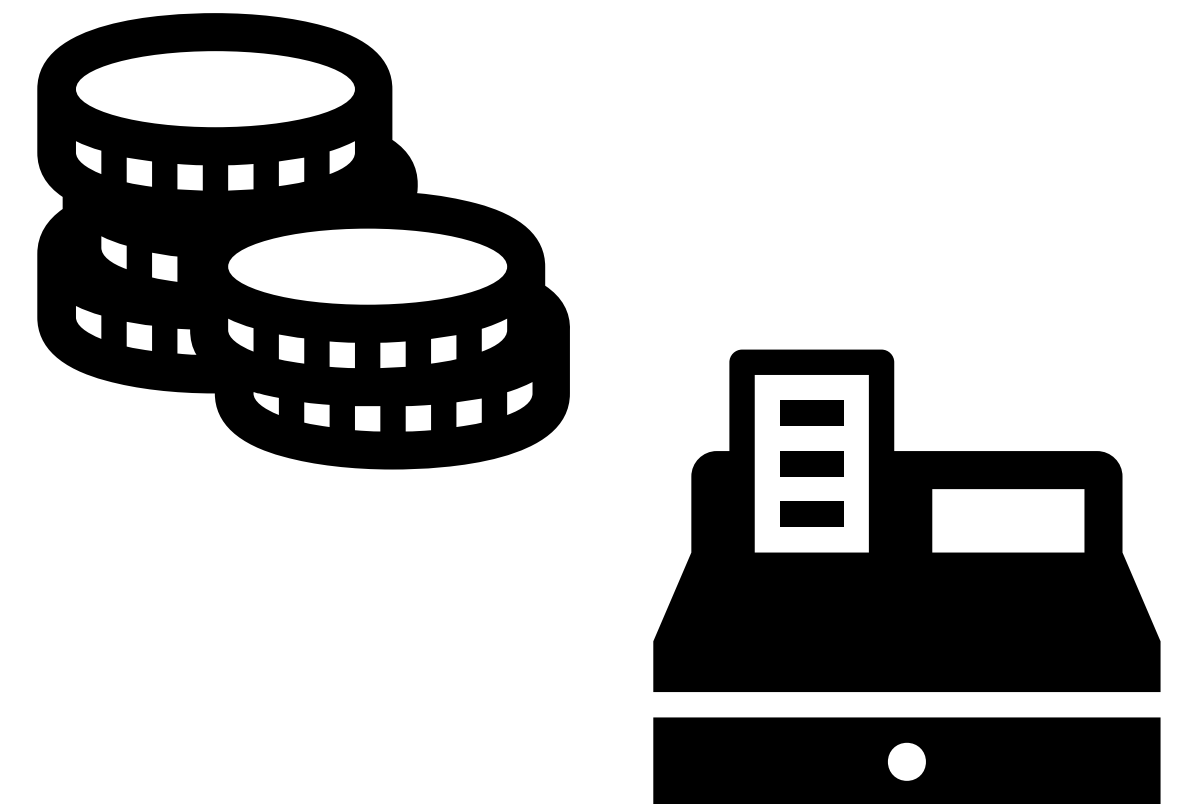
Finance

We are today talking about Finance within the Student Management System

The SMS is not a finance system, it's focus is student data

The SMS allows the tracking of financial aspects of student data, e.g. Course and Tuition fees, expenses etc.

We have specific finance integrations for more complicated financial management





Finance Preferences



Finance Preferences

To make use of the finance features you must configure your system to allow finance

Administration > Configuration > Preferences > Edit > Finance

Finance

Allow Agent Commission Updates:

Allow editing of exported invoices:

Available on Portal:

Biller Code:

Credit Note Number Scheme:

Invoicing

Hide Cancelled Invoice Documents on Portals:

Include Enrolment ID:

Prepare Invoices Nightly Job:

Invoice Logo:

readytech

Invoice Template:

Plus Invoice

Automatic SmartFees:

Payment Due Terms (Days):

14

Payment Gateway:

Payment Template:

Plus Receipt

Pronto Debtor Prefix:

Quote Template:

Finance System

Exports - Trading Name:

Invoice Type:

Item Invoice

Income Account (Bank Account):

Receivable Account:

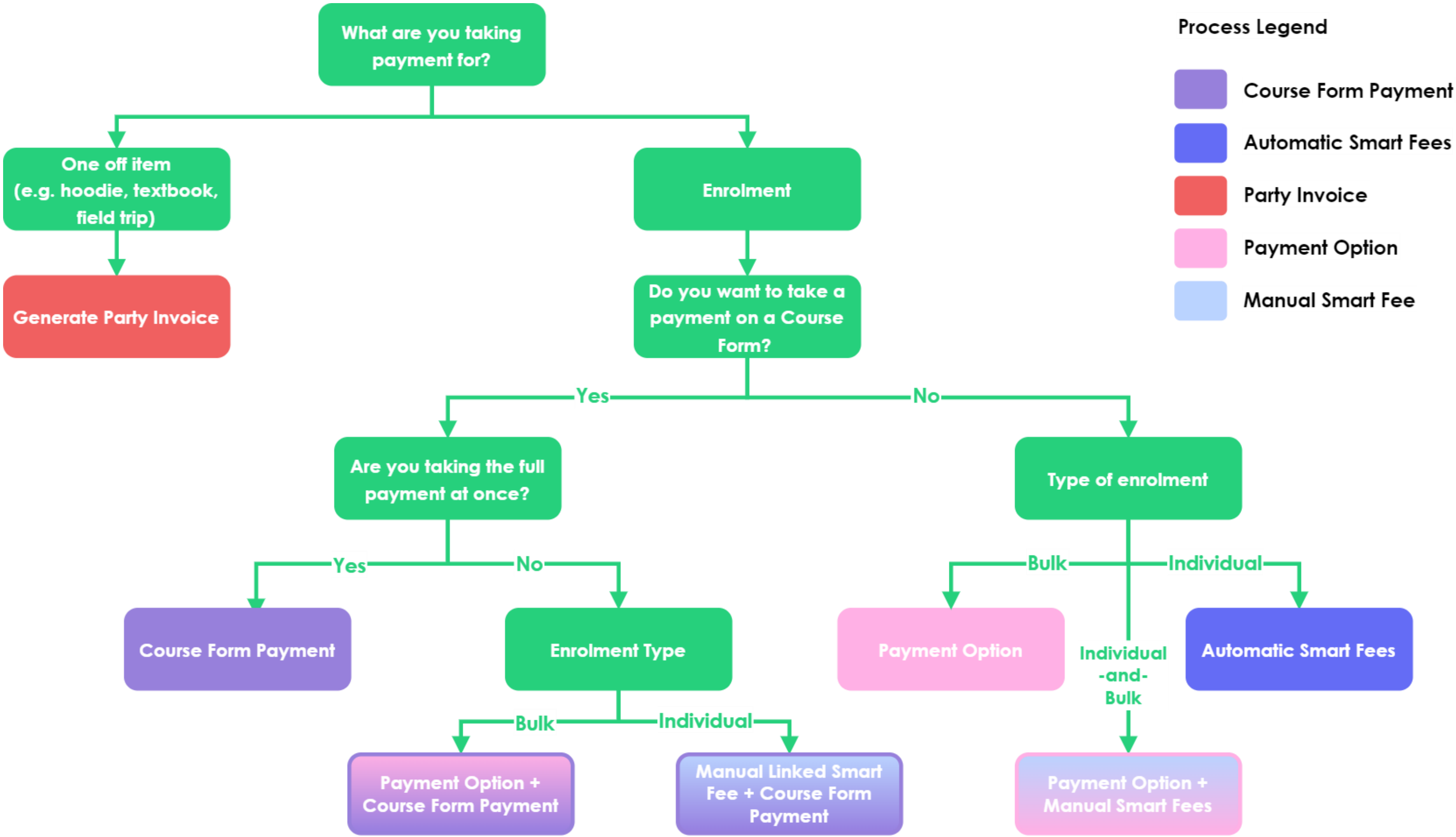


Finance Options

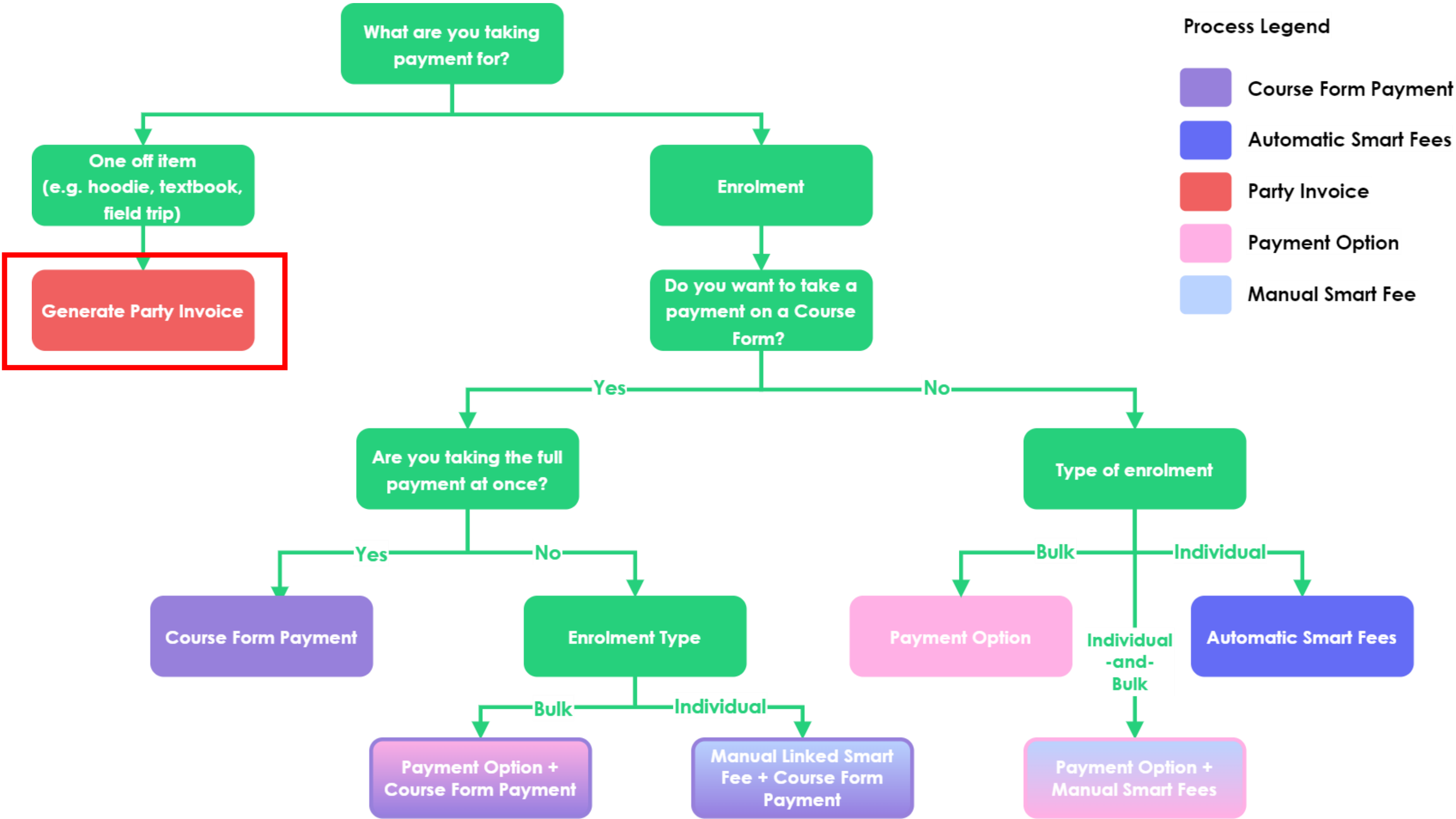
Finance Options

Options

Determine what processes you need to use according to the flow chart



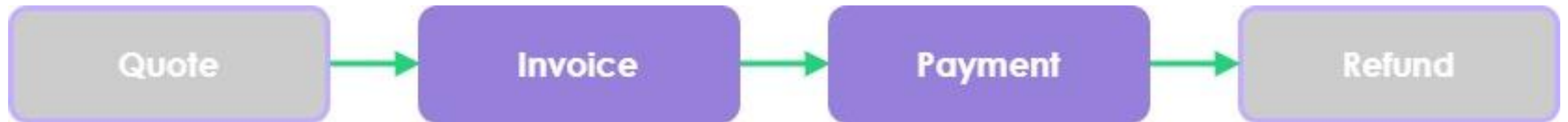
Party Invoices



Party Invoices

Two basic processes

1. Quote > Invoice > Payment > Refund
2. Invoice > Payment > Refund



Quote: Creating a Quote

Community > List All > select party > Finance > Quote > + new

Enter high level information above

Line items are entered below

This detailed information must be accurate for your financial statements

[illegible]

Qty	Line Item	Ledger	Job	Amount (Excl. tax)	Tax	Tax %	Tax Amount	Sub Total (Incl. tax)
1	Tuition Fee	TF - Tuition	Start Typing...	1250.00	GST Free	0.00	0.00	1250.00
<div> <div>+ New Line</div> </div>								

Total Tax:

\$0.00

Total Including Tax:

\$1,250.00

Create Quote

Cancel

Party Invoices

Quote: Accepting and Invoicing

To accept a quote, update the status to approved

Quotes Spencer Smith (00020006)

+ New

Search

Q Search

X Clear

Search Results

1 - 2 of 21 Page

Name	Quote #	Target	Description	Course/Group	Amount	Tax	Total	Status	Date	Exported
Quote 2023-02-07	QUOTE00002	Spencer Smith			\$1,150.00	\$0.00	\$1,150.00	Approved	7/2/2023	<div><input type="checkbox"/></div> <div></div> <div></div> <div></div>
Quote 2023-03-10	QUOTE00014	Provide First Aid (First Aid April) / ENREA00126			\$1,250.00	\$0.00	\$1,250.00	Pending	10/3/2023	<div><input type="checkbox"/></div> <div></div> <div></div> <div></div>

✓ Approve

X Reject

Create Invoice

Download (PDF)

Delete

To invoice from the quote > create invoice

Name	Quote #	Target	Description	Course/Group	Amount	Tax	Total	Status	Date	Exported
Quote 2023-02-07	QUOTE00002	Spencer Smith			\$1,150.00	\$0.00	\$1,150.00	Approved	7/2/2023	<div><input type="checkbox"/></div> <div></div> <div></div> <div></div>
Quote 2023-03-10	QUOTE00014	Provide First Aid (First Aid April) / ENREA00126			\$1,250.00	\$0.00	\$1,250.00	Approved	10/3/2023	<div><input type="checkbox"/></div> <div></div> <div></div> <div></div>

X Reject

Create Invoice

Download (PDF)

Delete

Review the details, then create the new invoice

Party > Smith, Spencer > Create > Invoice

Create

Cancel

Invoice Template:

Plus Invoice

Tax Invoice

To:

Smith, Spencer
9 ELIZABETH STREET
MELTON SOUTH, Victoria 3338
0455968635
gemma.cameron+SpencerSmith@readytech.io

ReadyTech Education
35 Saunders Street
Pymont, New South Wales 2009
ABN:

Invoice Number:

Quote Number:

QUOTE00014

Internal Reference:

Billor Reference:

Purchase Order ID:

Category:

Status:

Active

Description:

*Invoice Date:

10/3/2023

Payment Due Terms:

14

*Delivery Method:

Mail

Invoices

Community > List All > select party > Finance > Invoice > +
new

Enter details, then line items

Person

Profile

Compliance

Career/Employment

Enrolments 2 / 1

Certificates 1

Finance

Quotes

Invoices

Payments

Accounts

Balance: \$0.00

Schedule

Notes / Checklists 2 +

Email

SMS

Documents 15

Invoices Spencer Smith (00020006)

+ New

3
Number of Invoices

\$4,380.00
Total Invoices

\$4,380.00
Total Payments

\$0
Total Outstanding

\$0
Non-Deferred Total Outstanding

\$0
Deferred Total Outstanding

Search

Search Clear

Search Results

1 - 3 of 3 1 Page

Invoice Date	Number	Type	Party	Course/Group	Description	Status	Invoiced	Paid	Deferred	Outstanding	
8/2/2023	INVREA00001	Invoice	Smith, Spencer			Active	\$1,350.00	\$1,350.00	\$0.00	\$0.00	Eye \$...
8/2/2023	INVREA00002	Invoice	Smith, Spencer	Spencer Smith		Active	\$1,350.00	\$1,350.00	\$0.00	\$0.00	Eye \$...
20/2/2023	INVREA00005	Invoice	Smith, Spencer			Active	\$1,680.00	\$1,680.00	\$0.00	\$0.00	Eye \$...

1 - 3 of 3 1 Page

Create Invoice

Invoice Template:
 Plus Invoice ▼

Tax Invoice

To:	Smith, Spencer 9 ELIZABETH STREET MELTON SOUTH, Victoria 3338 0455968635 gemma.cameron+SpencerSmith@readytech.io	ReadyTech Education 35 Saunders Street Pyrmont, New South Wales 2009 ABN:
-----	--	--

Invoice Number:

 Quote Number:

 Internal Reference:

 Biller Reference:

 Purchase Order ID:

*Invoice Date: 📅

 Payment Due Terms:

Category:

 Status: ▼

*Delivery Method:

Description:

A B I U S Paragraph System Font 10pt

🔍 ☰ 🔗 ↶ ↷ ⌨️ ? <> ⇄

⌂ ✖️ ➕ ➡️ ⬅️ ⏪ ⏩ ⚙️ — ℑ × x² Ω

Qty	Line Item	Ledger	Subledger	Amount (Excl. tax)	Tax	Tax %	Tax Amount	Sub Total (Incl. tax)	Expected Net	Confirmed Net
+ 1	Tuition Fee × ▼	TF - Tuition × ▼	<input type="text" value="Start Typing..."/>	<input type="text" value="1250.00"/>	GST Free ▼	<input type="text" value="0.0"/>	<input type="text" value="0.0"/>	<input type="text" value="1250.0"/>		-
Total Tax:									\$0.00	
Total Including Tax:									\$1,250.00	

Create
X Cancel

Party Invoices

Payment: Recording a Payment

- NOTE: A payment cannot be edited after being recorded
- Double check all details before creating payments within the SMS
- Outstanding amounts will display within the side navigation for the party profile
- NOTE: the same payment steps are taken for all invoices generated by different means throughout the system

Person

Profile

Compliance

Career/Employment

Enrolments 2 / 1

Certificates 1

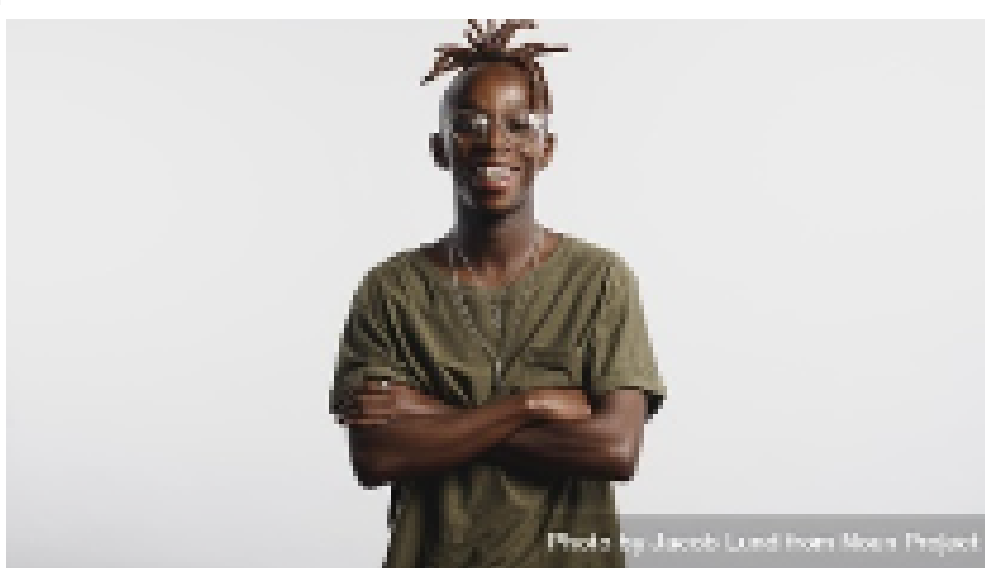
Finance


Balance: **\$-1250.00**

Schedule

✎

Spencer Smith 00020006



Australia 

22 September 1997 (25)

At Risk

View all

Profile

Title

First Name(s)

Surname

Middle Name(s)

Known By

Gender

Email

Phone

readytech

ReadyTech Education

236

Party Invoices

Payment Recording – 1. Invoice View

To record a payment directly against the invoice, locate the invoice

Community > List All > select party > Finance > Invoice

Within that line of the invoice, you will be provided with one or two options:

- 1. The dollar sign: To record a payment within the system that has been done externally
- 2. The card image: To make a payment through a payment gateway (if setup)

Invoices Spencer Smith (00020006)

+ New

4

Number of Invoices

\$5,630.00

Total Invoices

\$4,380.00

Total Payments

\$1,250.00

Total Outstanding

\$1,250.00

Non-Deferred Total Outstanding

\$0

Deferred Total Outstanding

Search

Q Search

✖ Clear

Search Results

1 - 4 of 4

1 Page

Invoice Date	Number	Type	Party	Course/Group	Description	Status	Invoiced	Paid	Deferred	Outstanding	
8/2/2023	INVREA00001	Invoice	Smith, Spencer			Active	\$1,350.00	\$1,350.00	\$0.00	\$0.00	\$...
8/2/2023	INVREA00002	Invoice	Smith, Spencer	Spencer Smith		Active	\$1,350.00	\$1,350.00	\$0.00	\$0.00	\$...
20/2/2023	INVREA00005	Invoice	Smith, Spencer			Active	\$1,680.00	\$1,680.00	\$0.00	\$0.00	\$...
10/3/2023	INVREA00017	Invoice	Smith, Spencer	Provide First Aid (First Aid April) / ENREA00126		Active	\$1,250.00	\$0.00	\$0.00	\$1,250.00	\$...

1 - 4 of 4

1 Page

New Payment Spencer Smith (00020006)

create

cancel

Invoice Number:

INVREA00017

Reference:

*Payment Date:

10/3/2023

*Type:

Payment

Source:

Cash

*Amount:

\$ 1250.00

Location:

Adelaide Office

Description:

Enabled

☒

SUMMARY

Invoice Number:

INVREA00017

Invoice Total:

\$1250.00

Paid to date:

\$0.00

Deferred:

\$0.00

Balance Due:

\$1250.00

Invoice Items

Include	Qty	Ledger	Description	Amount	Paid	Deferred	Due
<input checked="" type="checkbox"/>	1	Tuition	Tuition Fee	\$1250.00	\$0.00	\$0.00	\$ 1250.00

create

cancel

Party Invoices

Payment Recording – 2. Student Portal

Payments for an existing invoice can be taken within the Student Portal

First, enable payment for the Student Portal

Administration > Configuration > Preferences > Self-Service Portals > Finance

\$ Finance

Allow Payments:
Payment Gateway

☒
PayPal (PayPal)

Payment on Outstanding Course Invoices:
Payment on Outstanding Service Invoices:
Payment on Course Applications:

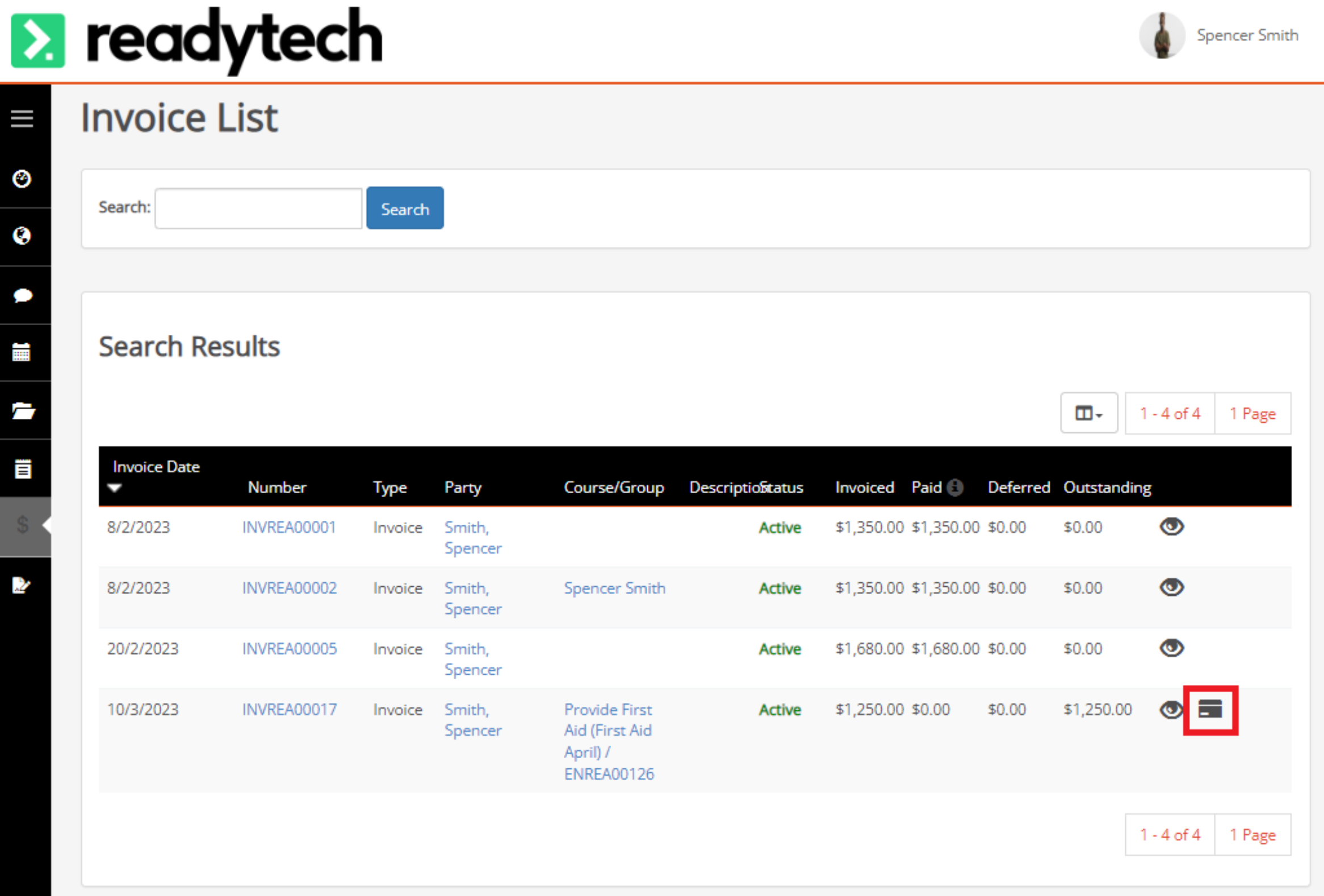
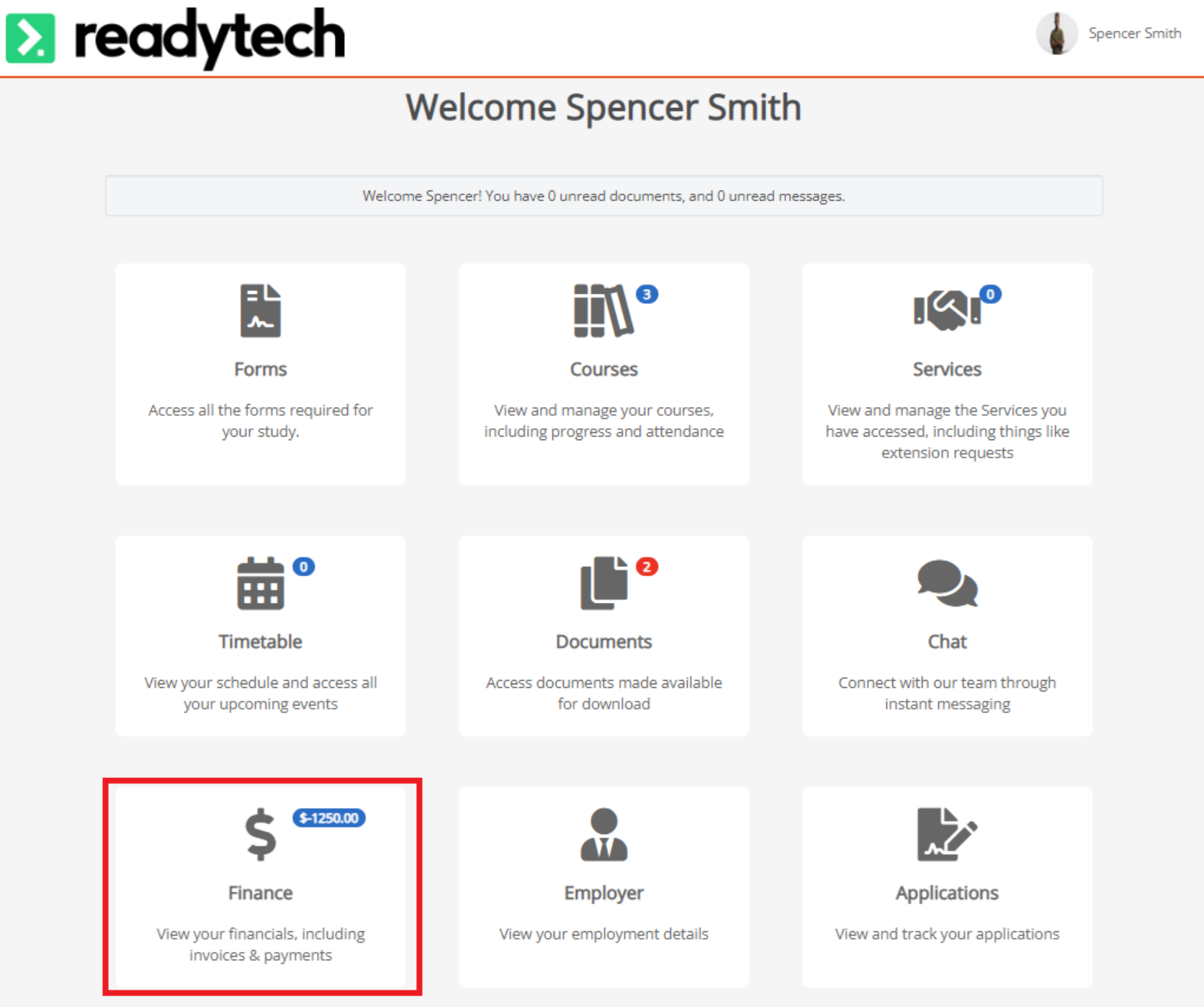
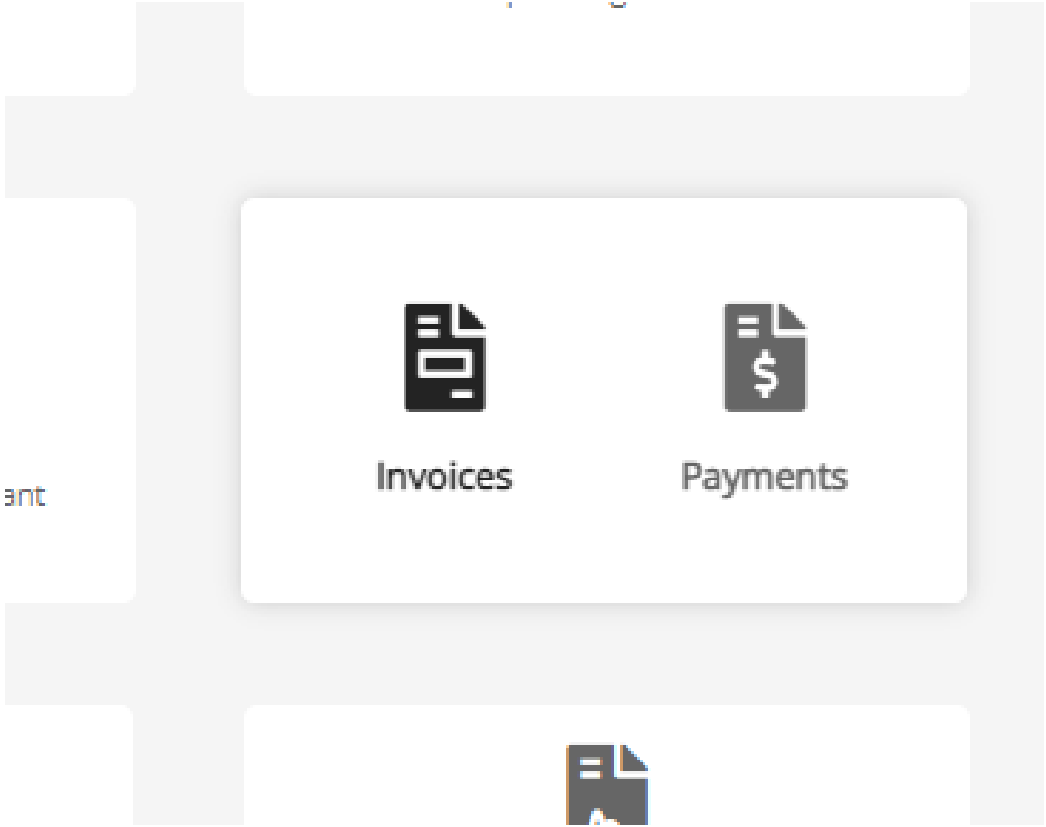
☒
☒
☒

Party Invoices

Payment Recording – Student Portal

Once enabled a student can login to the portal and pay

Finance > Invoices



Party Invoices

Refunds: Why?

Refunds can be issued if you have overcharged a student

Example : You erroneously create an invoice for \$1250, instead of \$1200.

- 1. Issue a refund
- 2. Issue a credit note

Invoice created

Person

Profile

Compliance

Career/Employment

Enrolments 2 / 1

Certificates 1

Finance

Balance: \$-1250.00

Schedule

Notes / Checklists 2 +

Email

SMS

Documents 16

Letters & Forms

Feedback Forms

Invoice paid

Person

Profile

Compliance

Career/Employment

Enrolments 2 / 1

Certificates 1

Finance

Balance: \$0.00

Schedule

Notes / Checklists 2 +

Email

SMS

Documents 17

Letters & Forms

Feedback Forms

Applications

Groups 0

Admin

Invoice INVREA00017 | Spencer Smith (00020006)

TAX INVOICE

To:

Smith, Spencer
9 ELIZABETH STREET
MELTON SOUTH, Victoria 3338
0455968635
gemma.cameron+SpencerSmith@readytech.io

ReadyTech Education
35 Saunders Street
Pymont, New South Wales 2009
ABN:

Invoice Number: INVREA00017

Invoice Date: 10/3/2023

Period: 14

Payment Due Terms: 24/3/2023

Quote Number: QUOTE00014

User: jobready.support

Internal Reference:

Bill Reference:

Purchase Order ID:

Category: Status: Active

Delivery Method: Mail

Qty	Line Item	Ledger	Job	Item Amount	Tax Amount	Sub Total
1	Tuition Fee	TF - Tuition		\$1,250.00	\$0.00	\$1,250.00
					Total Tax:	\$0.00
					Total Inc. Tax:	\$1,250.00

Party > Smith, Spencer > Payment Details

Payment was successfully created.

PAYMENT ADVICE

From:

Smith, Spencer
Home: 9 ELIZABETH STREET, MELTON SOUTH
0455968635
gemma.cameron+SpencerSmith@readytech.io

ReadyTech Education
35 Saunders Street
Pymont, New South Wales 2009
ABN:

Payment ID: PMT00014

Invoice Number: INVREA00017

Reference:

Payment Date: 10/3/2023

Type: Payment

Source: Cash

Amount: \$1250.00

Location: Adelaide Office

Description:

User: jobready.support

Enabled:

Invoice Items

Qty	Ledger	Description	Amount	Paid
1	Tuition	Tuition Fee	\$1250.00	\$1250.00

Balance

Date	Type	Source	Amount Paid	Balance Due
10/3/2023	Payment	Cash	\$1,250.00	\$0.00

Party Invoices

Refund: Issuing

Very similar process to creating a payment as a refund is a type of payment in the SMS

Community > List All > select party > Finance > Payment > +

Key things to select to ensure its recorded as a refund:

- 1. **Type:** refund
- 2. **Due:** -\$ amount you want to refund (always negative)
- 3. **Description** (optional): Good practice to note why a refund is being recorded

Person

Profile

Compliance

Career/Employment

Enrolments2 / 1

Certificates1

Finance

Balance: \$0.00

Schedule

Notes / Checklists2 +

Email

SMS

Documents17

Letters & Forms

Feedback Forms

Applications

Groups0

Admin

New PaymentSpencer Smith (00020006)

create

cancel

Select an Invoice

INVREA00017
10/3/2023
\$1250.00
Due: \$0.00

INVREA00005
20/2/2023
\$1680.00
Due: \$0.00

INVREA00002
8/2/2023
\$1350.00
Due: \$0.00

INVREA00001
8/2/2023
\$1350.00
Due: \$0.00

Invoice Number:INVREA00017

Reference:

*Payment Date:10/3/2023

*Type:Refund

Source:Cash

*Amount:\$ -50.00Invoice fully paid

Location:Adelaide Office

Description:

Enabled☒

SUMMARY

Invoice Number:INVREA00017

Invoice Total:\$1250.00

Paid to date:\$1250.00

Deferred:\$0.00

Balance Due:\$0.00

Invoice Items

Include	Qty	Ledger	Description	Amount	Paid ⓘ	Deferred	Due
<input checked="" type="checkbox"/>	1	Tuition	Tuition Fee	\$1250.00	\$1250.00	\$0.00	\$ -50

Party Invoices

Refund: Issuing

Person

Profile

Compliance

Career/Employment

Enrolments 2 / 1

Certificates 1

Finance

Balance: \$-50.00

Schedule

Notes / Checklists 2 +

Email

SMS

Documents 18

Letters & Forms

Feedback Forms

Applications

Groups 0

Admin

Party > Smith, Spencer > Payment Details

✓ Refund successfully created.

PAYMENT ADVICE

From: Smith, Spencer
Home: 9 ELIZABETH STREET, MELTON SOUTH
0455968635
gemma.cameron+SpencerSmith@readytech.io

ReadyTech Education
35 Saunders Street
Pyrmont, New South Wales 2009
ABN:

Payment ID: PMT00015
Invoice Number: INVREA00017
Reference:
Payment Date: 10/3/2023
Type: Refund
Source: Cash
Amount: \$-50.00
Location: Adelaide Office
Description:

User: jobready.support
Enabled ☒

Invoice Items

Qty	Ledger	Description	Amount	Paid
1	Tuition	Tuition Fee	\$1250.00	\$-50.00

Balance

Date	Type	Source	Amount Paid	Balance Due
10/3/2023	Payment	Cash	\$1,250.00	\$0.00
10/3/2023	Refund	Cash	-\$50.00	\$50.00

Party Invoices

Refund: Credit Note

A credit note enables a balance to be returned to zero

Community > List All > select party > Finance > Invoice > Select Invoice > click on the '...' > Create Credit Note

You will see the same information as when creating an invoice

Credit notes can take a negative value

Invoice Date	Number	Type	Party	Course/Group	Description	Status	Invoiced	Paid	Deferred	Outstanding	
8/2/2023	INVREA00001	Invoice	Smith, Spencer			Active	\$1,350.00	\$1,350.00	\$0.00	\$0.00	👁️ \$...
8/2/2023	INVREA00002	Invoice	Smith, Spencer	Spencer Smith		Active	\$1,350.00	\$1,350.00	\$0.00	\$0.00	👁️ \$...
20/2/2023	INVREA00005	Invoice	Smith, Spencer			Active	\$1,680.00	\$1,680.00	\$0.00	\$0.00	👁️ \$...
10/3/2023	INVREA00017	Invoice	Smith, Spencer	Provide First Aid (First Aid April) / ENREA00126		Active	\$1,250.00	\$1,200.00	\$0.00	\$50.00	👁️ \$...

Edit

Cancel

Create Credit Note

Reproduce PDF Document

Qty	Line Item	Ledger	Subledger	Amount (Excl. tax)	Tax	Tax %	Tax Amount	Sub Total (incl. tax)	Expected Net	Confirmed Net
1	Tuition Fee	TF - Tuition	Start Typing...	-50.00	GST Free	0.0	0.00	-50.00		
Total Tax:										\$0.00
Total Including Tax:										-\$50.00

Person

Profile

Compliance

Career/Employment

Enrolments 2 / 1

Certificates 1

Finance

Quotes

Invoices

Payments

Accounts

Balance: \$0.00

Schedule

Notes / Checklists 2 +

Email

SMS

Documents 19

Letters & Forms

Feedback Forms

Invoices Spencer Smith (00020006)

+ New

5
Number of Invoices

\$5,580.00
Total Invoices

\$5,630.00
Total Payments

-\$50.00
Total Outstanding

-\$50.00
Non-Deferred Total Outstanding

\$0
Deferred Total Outstanding

Search

Search Clear

Search Results

1 - 5 of 51 Page

Invoice Date	Number	Type	Party	Course/Group	Description	Status	Invoiced	Paid	Deferred	Outstanding	
8/2/2023	INVREA00001	Invoice	Smith, Spencer			Active	\$1,350.00	\$1,350.00	\$0.00	\$0.00	👁️ \$...
8/2/2023	INVREA00002	Invoice	Smith, Spencer	Spencer Smith		Active	\$1,350.00	\$1,350.00	\$0.00	\$0.00	👁️ \$...
20/2/2023	INVREA00005	Invoice	Smith, Spencer			Active	\$1,680.00	\$1,680.00	\$0.00	\$0.00	👁️ \$...
10/3/2023	INVREA00017	Invoice	Smith, Spencer	Provide First Aid (First Aid April) / ENREA00126		Active	\$1,250.00	\$1,250.00	\$0.00	\$0.00	👁️ \$...
10/3/2023	INVREA00018	Credit	Smith, Spencer			Active	-\$50.00	\$0.00	\$0.00	-\$50.00	👁️ ...

1 - 5 of 51 Page

readytech

ReadyTech Education 243

Party Invoices

Refunding: Xero Integration

If you're using Xero integration

The process for refunds is reversed

1. Create a credit note
2. Create a refund



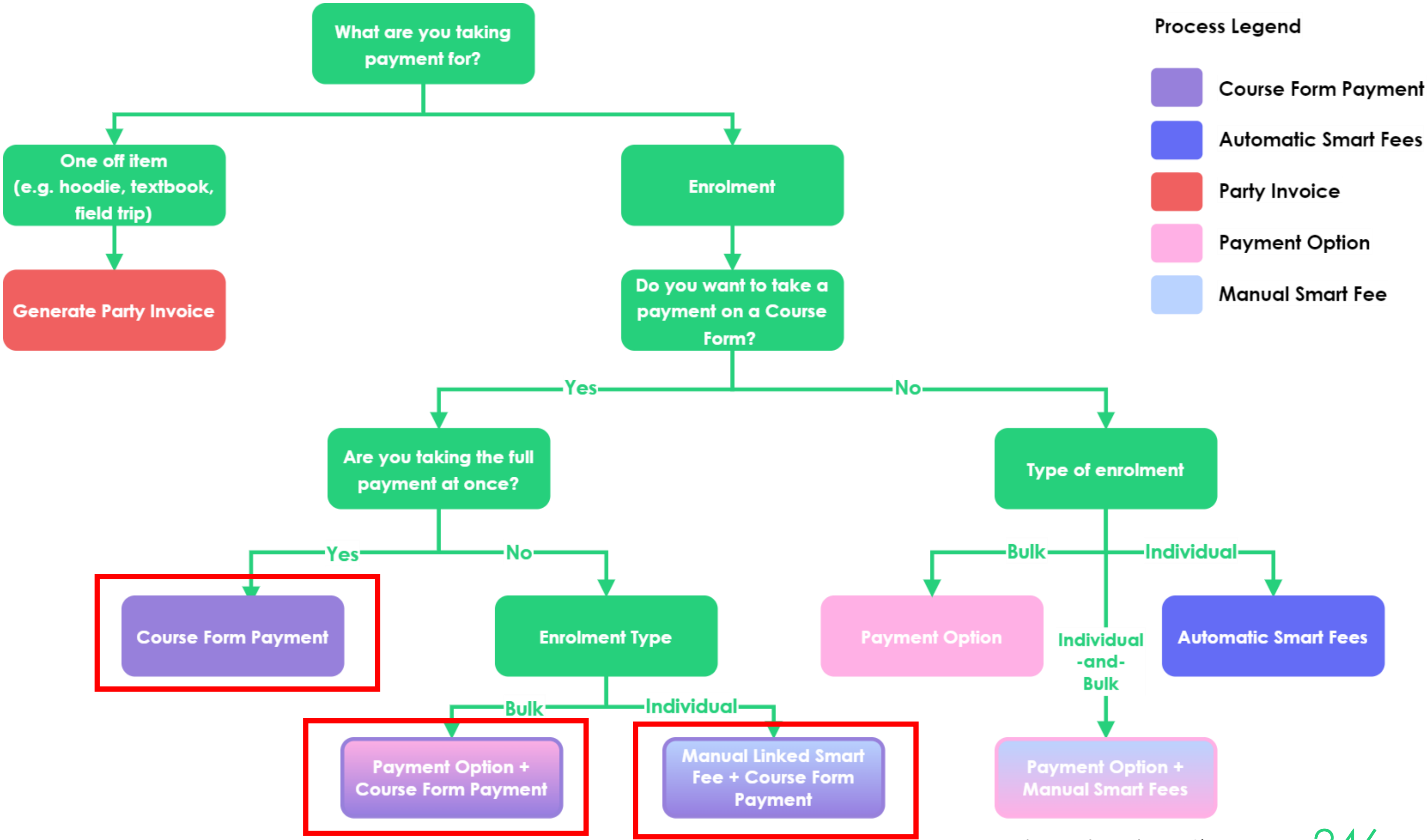
Lets go do it!

Let's take a look at:

- Create a quote
- Create a new invoice
- Record payment for invoice
- Issue a refund
- Issue a credit note



Course Form Payment

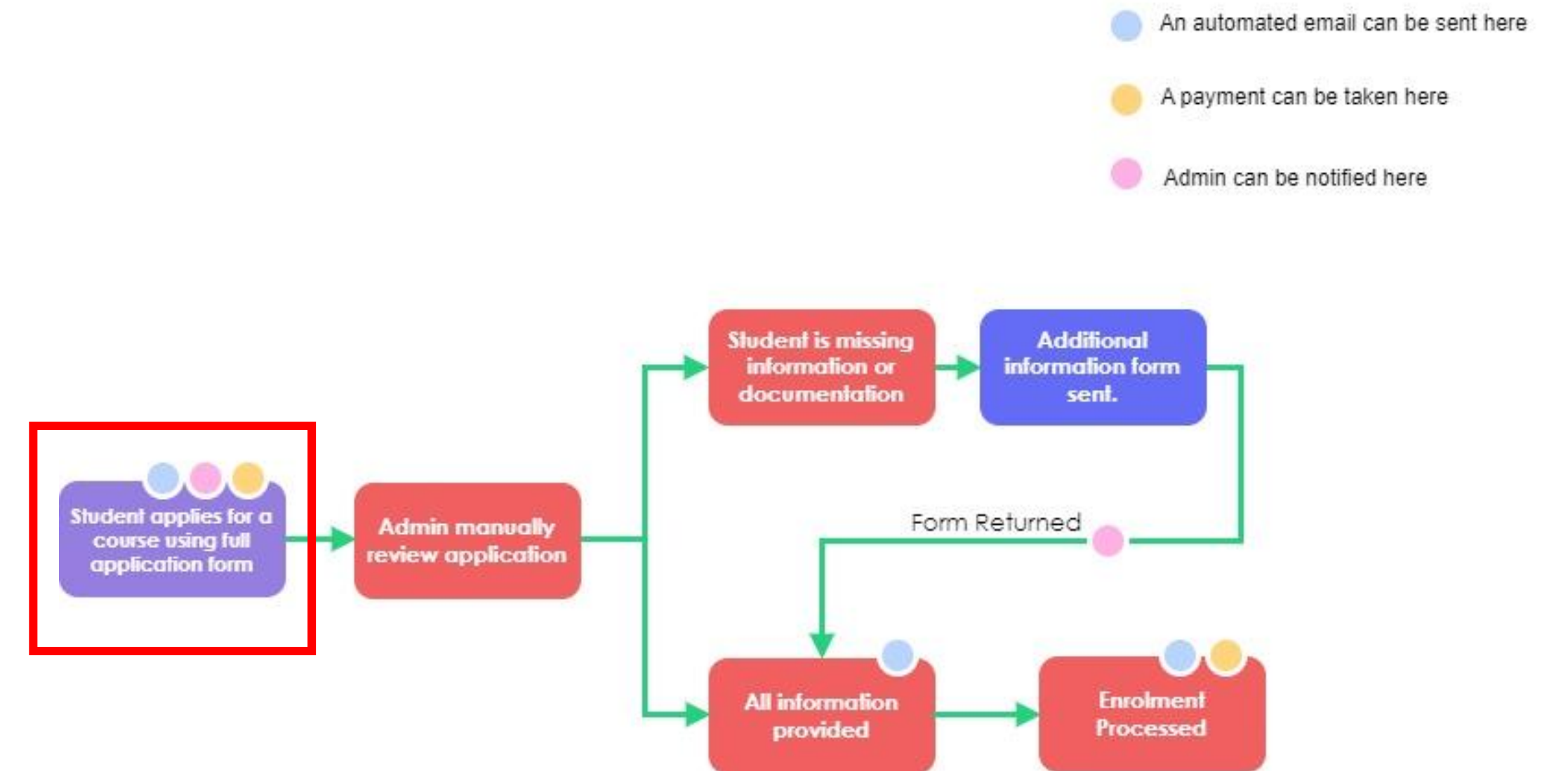


Course Form Payment

How to Setup/Enable

To take a payment on a Course Form, you will need to:

1. Setup 3rd party payment gateway integration
2. Enable payments on Course Form



Course Form Payment

How to Setup/Enable

Administration > Forms > Course Forms > select form > Finance

You will then need to enable payments

1. Select payment gateway
2. Select payment options categories
3. Enable allow pay later

The screenshot shows the 'Edit Form' interface with three tabs: 'Details', 'Settings', and 'Finance'. The 'Finance' tab is highlighted with a red border. It contains the following settings:

- Enable Payments:** ☒ *i*
- *Payment Gateway Provider:** *i*
- Payment Option Categories:** *i*
- Allow Pay Later:** ☐ *i*

The 'Settings' tab contains the following settings:

- Enabled:** ☒
- Login:** *i*
- Disable Party Data Update:** ☐ *i*
- Auto Confirm Enrolments:** ☐ *i*
- Auto Confirm Services:** ☐ *i*
- Hide from Student Portal:** ☐

The 'Details' tab contains the following settings:

- Name:**
- Location:**
- Branding:** *i*

Course Form Payment

Add a Price

To take a payment at the time of application, add a payment option to each COURSE

Courses > Course List > select course > Finance > Payment Options

Add a line item/s
List a total price

Course

Timetable

Resource Manager

Course > Copy Course

Confirm Course to copy: Diploma of Accounting (Linking Smart Fees to a Course)

AVETMISS Code: FNS50222

Course Description: Diploma of Accounting

*New Start Date: 2/5/2023

*New End Date: 2/5/2024

Copy Default Enrolment Status: ☒

Copy Documents: ☒

Copy Event Series: ☒

Copy Events: ☒

Copy Include Course Forms: ☒

Copy Integration Settings: ☒

Copy Online Enrolment Settings: ☒

Copy Payment Options: ☒

* Note can be copied when duplicating course

Course > Diploma of Accounting (Linking Smart Fees to a Course) > Create > Payment Option

create

cancel

*Date From: 21/2/2023

Date To:

Type: Option

Category:

Default Option: ☐

*Payment Due Terms (Days): 10

Additional Payment Gateway Parameters:

Available on: ☒ Course Application Forms

☐ Course Applications - Student Portal

☐ OEP

☐ Logged-in users of OEP only

Credit Card Surcharge: 0.0 %

Discount (Quantity):

Discount (Code): ☐ Enabled

Scholarships: ☐ Enabled

*Name: Course application form price

Description:

Items

Ledger	Line Item	C%	Employer Rate	Subledger	Amount (Excl. tax)	PNH	Deferred Revenue	Tax	Tax %	Tax Amount	Total (Incl. tax)
123456 - t	Enrolment ... x	<input type="checkbox"/>	No override	Start Typi...	550.00	<input type="checkbox"/>	<input type="checkbox"/>	GST Free	0.0	0.00	550
Create	Immediate	Invoice To	Student	+/- 0 days, On	Enrolment Creation						

Course Form Payment

Line-Item

Line items contain the essential invoice information:

- Quantity
- Line items (what we are charging for)
- **Ledger (important if you are exporting to an external finance system such as Xero)**
- Subledger (if required)
- Amount to be charged, tax and sub total.

Ledger its configurable:

Administration > Lookups > Reference Data > Ledger Code Lookup

Qty	Line Item	Ledger	Subledger	Amount (Excl. tax)	Tax	Tax %	Amount	Sub Total (Incl. tax)	Expected Net	Confirmed Net
1	Start Typing...	Start Typing...	Start Typing...	0.00	GST Free	0.0		0.00		
<div>Total Tax: \$0.00</div> <div>Total Including Tax: \$0.00</div>										

Course Form Payment

Student View

When enabled, the last step of your course application will be payment



Application Form

1 Payment

Payment

Payment Options

Select a Payment Option

Pay Now

Select this option if you want to pay now. You'll be redirected to the Payment Gateway.

Pay Later

Select this option to pay later. An invoice will be provided to you, or your sponsor, post submission.

✓ Course application form price ▲	\$550.00
Enrolment Fee	\$550.00
Subtotal:	\$550.00
Tax:	\$0.00
Total:	\$550.00

Back Save Pay Now

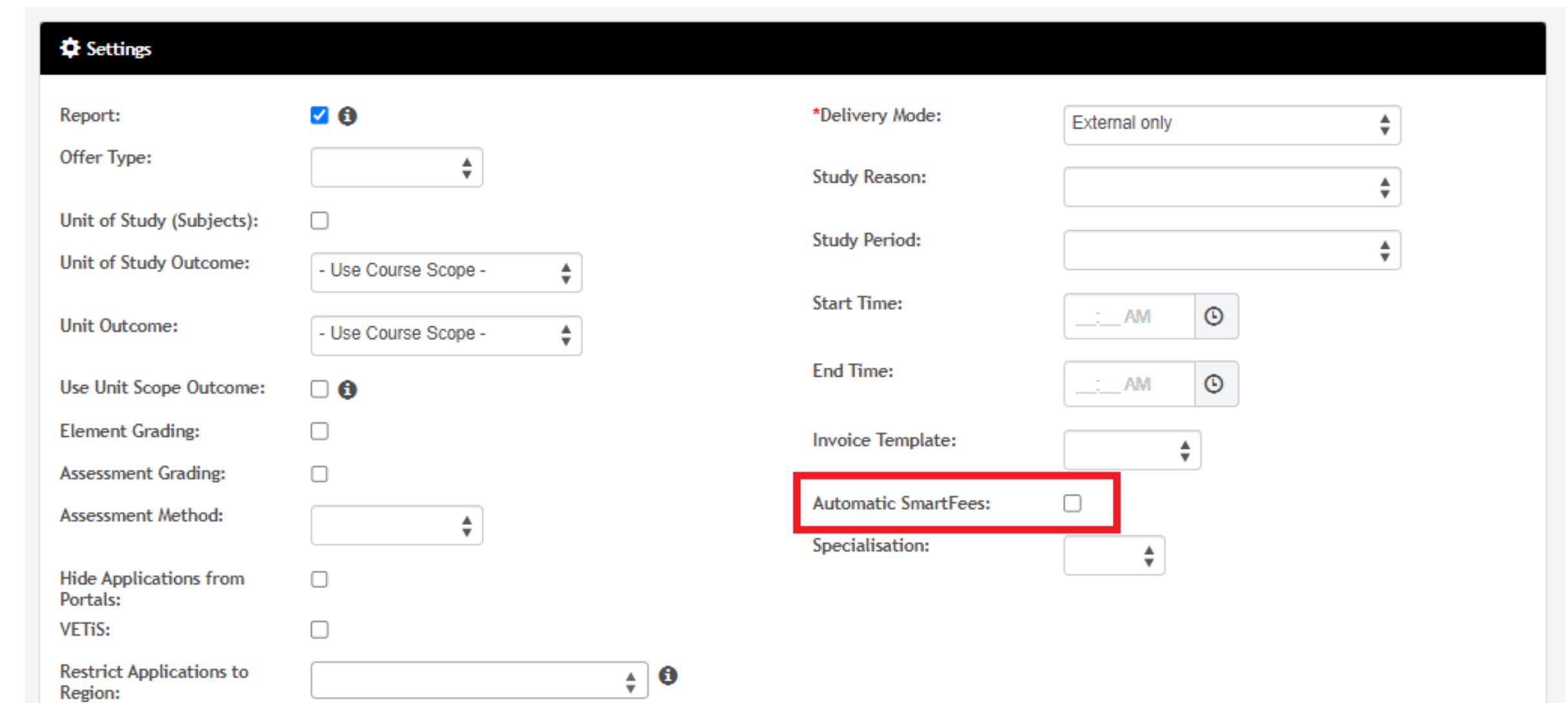
Course Form Payment

Smart Fees - Automatic Smart Fees

You **CAN'T** use Automatic Smart fees if you wish to take payment within the course form

Please ensure you turn this off

Courses > Course List > select course > Details > Edit > Settings



The screenshot shows a 'Settings' form with two columns of options. The 'Automatic SmartFees' checkbox is highlighted with a red box and is currently unchecked. Other settings include 'Report' (checked), 'Offer Type' (dropdown), 'Unit of Study (Subjects)' (checkbox), 'Unit of Study Outcome' (dropdown), 'Unit Outcome' (dropdown), 'Use Unit Scope Outcome' (checkbox), 'Element Grading' (checkbox), 'Assessment Grading' (checkbox), 'Assessment Method' (dropdown), 'Hide Applications from Portals' (checkbox), 'VETiS' (checkbox), 'Restrict Applications to Region' (dropdown), 'Delivery Mode' (dropdown), 'Study Reason' (dropdown), 'Study Period' (dropdown), 'Start Time' (time picker), 'End Time' (time picker), 'Invoice Template' (dropdown), and 'Specialisation' (dropdown).

Setting	Value
Report	<input checked="" type="checkbox"/>
Offer Type	[Dropdown]
Unit of Study (Subjects)	<input type="checkbox"/>
Unit of Study Outcome	- Use Course Scope -
Unit Outcome	- Use Course Scope -
Use Unit Scope Outcome	<input type="checkbox"/>
Element Grading	<input type="checkbox"/>
Assessment Grading	<input type="checkbox"/>
Assessment Method	[Dropdown]
Hide Applications from Portals	<input type="checkbox"/>
VETiS	<input type="checkbox"/>
Restrict Applications to Region	[Dropdown]
Delivery Mode	External only
Study Reason	[Dropdown]
Study Period	[Dropdown]
Start Time	[Time Picker]
End Time	[Time Picker]
Invoice Template	[Dropdown]
Automatic SmartFees	<input type="checkbox"/>
Specialisation	[Dropdown]

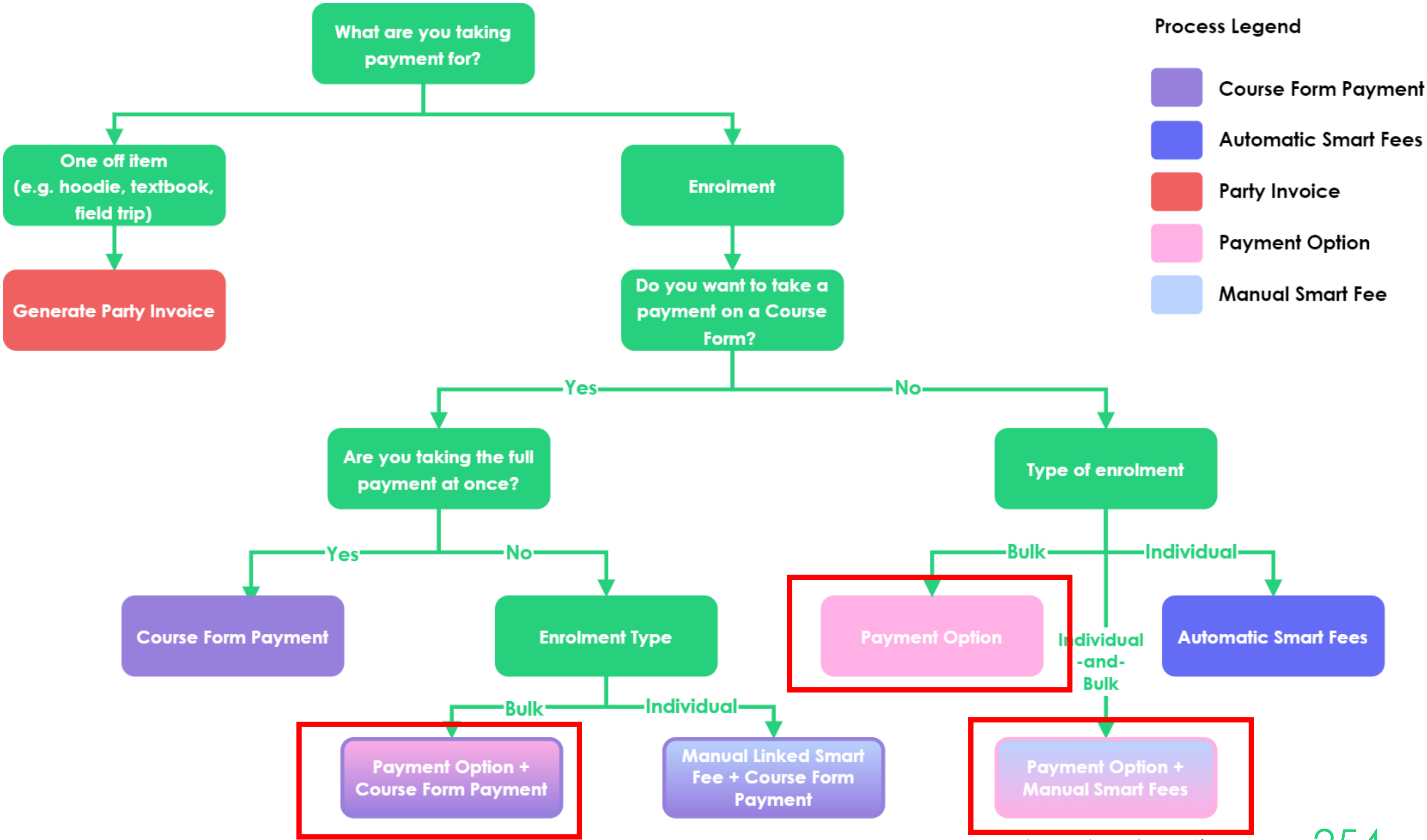
Lets go do it!

Let's take a look at:

- Enable payment on a Course
- Setup payment option on a Course
- Complete an application to show payment



Bulk Enrolments Payment Options



Add a Price to a Course

For bulk enrolment, attach a payment at the time of enrolment

Courses > Course List > select course > Finance
> Payment Options

Course

Timetable

Resource Manager

Course > Copy Course

Confirm Course to copy: Diploma of Accounting (Linking Smart Fees to a Course)

AVETMISS Code: FNS50222

Course Description: Diploma of Accounting

*New Start Date: 2/5/2023

*New End Date: 2/5/2024

Copy Default Enrolment Status: ☒

Copy Documents: ☒

Copy Event Series: ☒

Copy Events: ☒

Copy Include Course Forms: ☒

Copy Integration Settings: ☒

Copy Online Enrolment Settings: ☒

Copy Payment Options: ☒

* Note can be copied when duplicating course

Course > Diploma of Accounting (Bulk Enrolment) > Create > Payment Option

create cancel

*Date From:	<input type="text" value="10/3/2023"/>	Available on:	<input type="checkbox"/> Course Application Forms ⓘ <input type="checkbox"/> Course Applications - Student Portal ⓘ <input type="checkbox"/> OEP ⓘ <input type="checkbox"/> Logged-in users of OEP only
Date To:	<input type="text"/>		
Type:	<input type="text" value="Option"/>		
Category:	<input type="text"/>	Discount (Quantity):	<input type="text"/> ⓘ
Default Option:	<input type="checkbox"/>	Discount (Code):	<input type="checkbox"/> Enabled
*Payment Due Terms (Days):	<input type="text" value="1"/> ⓘ	Scholarships:	<input type="checkbox"/> Enabled
Additional Payment Gateway Parameters:	<input type="text"/>		

*Name:

Description:

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Paragraph ▼
System Font ▼
10pt ▼

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Payment Option

Items and Trigger

For the payment item you will need to add two things.

- 1. Line items
This is where you list out what you are charging the students (same as for invoices)
- 2. Trigger
This is how we set when we would like to create the invoice.

Items

Ledger	Line Item	C%	Employer Rate	Subledger	Amount (Excl. tax)	PNH	Deferred Revenue	Tax	Tax %	Tax Amount	Total (Incl. tax)
CF - Course Fee	Course F... x	<input type="checkbox"/>	No override	Start Typi...	1630	<input type="checkbox"/>	<input type="checkbox"/>	GST Free	0.0	0.00	1630.0
Create	Immediate	Invoice To	Student	+/- 0	days, On	Enrolment Creation					

+ New Line

Payment Option

Bulk enrolment

Within the bulk enrolment wizard you will see the payment option available to be selected.

If you have triggered the invoice to be auto created on enrolment a students invoice will also be created at this time.

Bulk Enrolment

Bulk Enrolment - CSEREA00034 (FNS50222) from 1/5/2023 to 31/5/2023

STUDENTS

EMPLOYER

ENROLMENT

ELECTIVES

SCHEDULING

OUTCOMES

PAYMENT
Apply your payment option

CONFIRM

Back

Cancel

Next

Confirm Now

Options

No payment required

Bulk enrolment payment\$1630.00

Description	Amount
Course Fee	1630.0

Payment Terms

Use default payment terms

Payment will be due on

Proposed Payment Schedule

Cancel

Back

Next

Confirm Now

Person

Enrolment Details ENREA00216 / Stephen Smith (00020004)

Student: Stephen Smith (00020004)

Enrolment ID: ENREA00216

Course: CSEREA00034 / Bulk Enrolment

Start Date: 1/5/2023

Program: FNS50222 / Diploma of Accounting

Target End Date: 31/5/2023

Enrolment Status: Active

End Date:

GPA: 0

Brand:

Summary

Units

Attendance

Invoiced

Claims

0%

0.00%

100.0%

0%

Total Units: 11

Scheduled Hours: 0.0

Total Projected: \$1630.00

Total Claims: 0

Total Units Completed: 0

Attended Hours: 0.0

Total Invoiced: \$1630.00

Total Invoiced: 0

Course Details

Worker Type: Academic

Trainee/Apprentice

Claims/Funding

Finance

Custom Details

More

Worker Type: Academic

Tully Tywin (00020014)

Study Mode: Qualification Level: VETIS:

Full Time Diploma/421

Bulk Enrolments

Smart Fees

You **CAN'T** use Smart Fees if you are making use of Bulk enrolments.

If you are unable to see payment options on the course this may be because automatic smart fees has been enabled
Turn this off

The screenshot shows the 'Settings' page in the ReadyTech Education system. On the left sidebar, the 'Finance' menu item is highlighted with a red box. In the main content area, the 'Automatic SmartFees' checkbox is checked and highlighted with a red box. Other settings visible include 'Report', 'Offer Type', 'Unit of Study', 'Unit of Study Outcome', 'Unit Outcome', 'Use Unit Scope Outcome', 'Element Grading', 'Assessment Grading', 'Assessment Method', 'Hide Applications from Portals', 'VETiS', 'Restrict Applications to Region', 'Course Information', 'Delivery Mode', 'Study Reason', 'Study Period', 'Start Time', 'End Time', 'Invoice Template', and 'Specialisation'.

The screenshot shows the 'Settings' page in the ReadyTech Education system. On the left sidebar, the 'Payment Options' menu item is highlighted with a red box. In the main content area, the 'Automatic SmartFees' checkbox is unchecked and highlighted with a red box. Other settings visible include 'Report', 'Offer Type', 'Unit of Study', 'Unit of Study Outcome', 'Unit Outcome', 'Use Unit Scope Outcome', 'Element Grading', 'Assessment Grading', 'Assessment Method', 'Hide Applications from Portals', 'VETiS', 'Restrict Applications to Region', 'Course Information', 'Delivery Mode', 'Study Reason', 'Study Period', 'Start Time', 'End Time', 'Invoice Template', and 'Specialisation'.

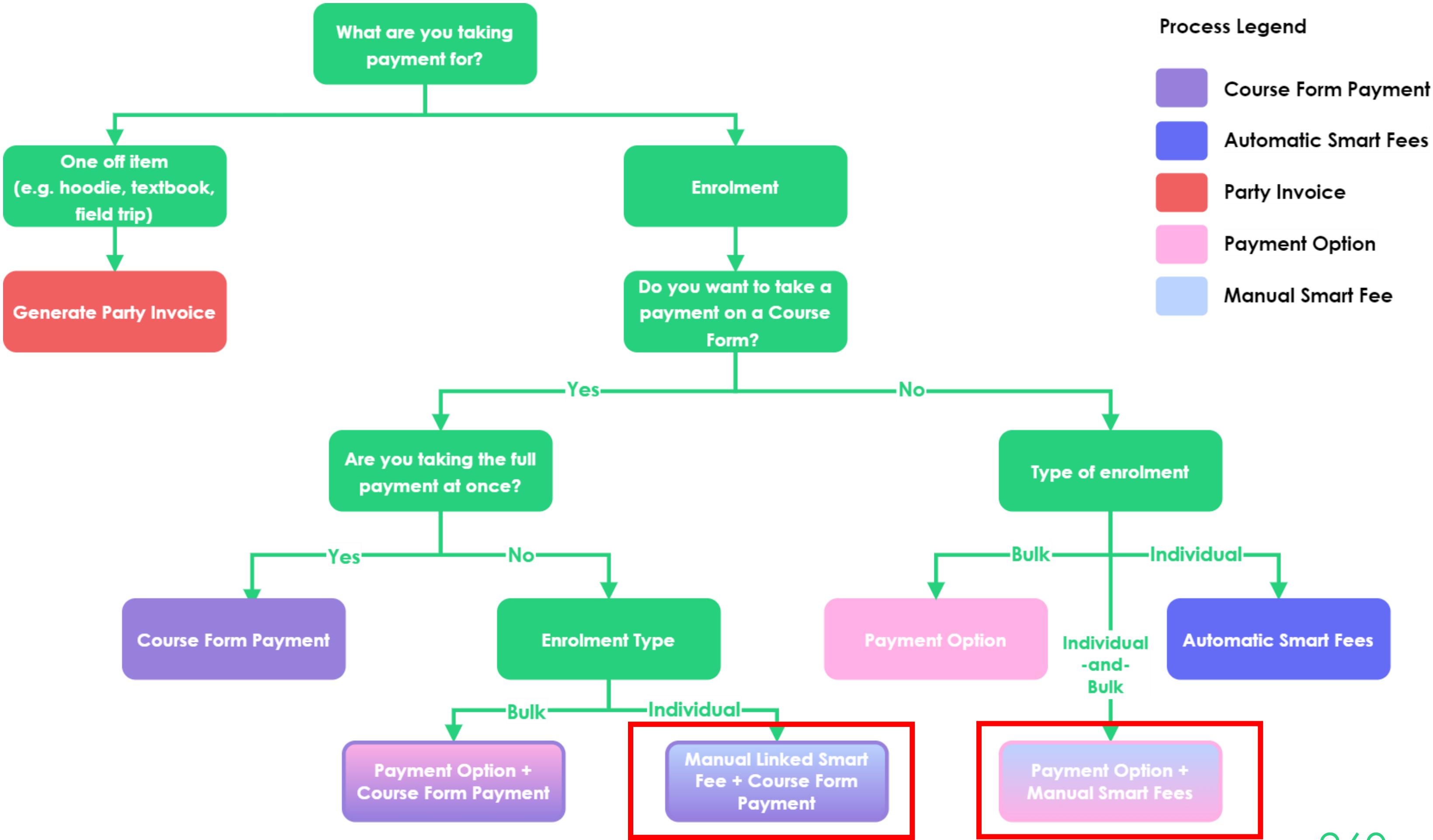
Lets go do it!

Let's take a look at:

- Creating a Payment options
- Using payment option when doing a Bulk enrolment



Smart Fees Manual



Smart Fees

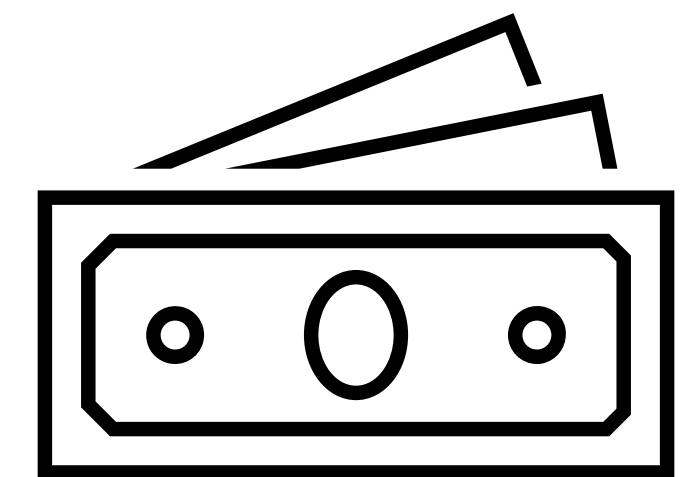
Overview

Smart fees let you

- Create a library of pre-defined fees
- Apply these fees to things like courses
- Create rules to dictate how certain fees should be used e.g. discounts or charged twice!

Smart fees are created by:

1. Setting up a smart fee library
2. Linking to a Course
 - A. Manually linking to course
 - B. Automatic Smart Fee
3. Use during enrolment



Smart Fees

1. Setting up a Smart Fee Library

Administration > Finance > Smart Fee Library > +

Type: You can optionally configure a Smart Fee Type to be used for reporting needs (e.g. Tuition or Resource fee)

Status – Identifies if the Smart Fee is ready for use, or still pending data entry

Category - Can be used to group this Smart Fees together

Amount – The appropriate \$ value

Links - Choose where you would like it to apply

Trigger – Controls how and when you want the invoice generated

The screenshot displays the 'Details' and 'Settings' sections of a Smart Fee configuration page. Red boxes highlight the following fields:

- Details Section:**
 - Name:** Tuition Fees
 - Type:** Tuition Fee
 - Category:** Course
 - Status:** Approved
- Settings Section:**
 - Amount:** \$ 9633.00
- Links Section:**
 - Program:** Diploma of Accounting (FN50222)
- Trigger Section:**
 - Method:** Immediate
 - Type:** Invoice
 - Target:** Student
 - Adjustment:** +/- 0 days
 - Event:** Enrolment Creation

Other visible fields include Description, Pricing Period, Start Date, End Date, Agent Commission, Deferred Revenue, Discount (Code), Subledger, Tax, Multiplier, and Modifier Rules.

Smart Fees

Type

You can optionally configure a Smart Fee Type to be used for reporting needs, identifying the Smart Fee item as a Tuition or Resource fee

Administration > Lookups > Reference Data > Smart Fee Library Item Type

Setup > Reference Data > Smart Fee Library Item Type

enable all

disable all

Cancel

ID	External ID	Name	Colour	Description	Reporting Type	Manual invoicing	Enabled	Actions
3		Nothing special	Nothing special			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div></div> <div></div>
2		Resource Fee	Resource Fee		Resource	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div></div> <div></div>
1		Tuition Fee	Tuition Fee		Tuition	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div></div> <div></div>

Setup > Reference Data > Smart Fee Library Item Type > New

Save

Cancel

Smart Fee Library Item Type

ID

4

External ID

* Name

Colour

Choose a colour

Description

Reporting Type

Tuition

Resource

Manual invoicing

Enabled

Smart Fees

Category = Course

Here, students will be charged a single total fee for the full course (in this case, \$1970)

Here, total enrolment for course is \$1970

Smart Fee Library

Details

Name

Type

Category

Description

Category = Course

Course

Status

Pricing Period

Start Date

End Date

Approved

Settings

Agent Commission

Deferred Revenue

Discount (Code)

Enabled

Scholarships

\$ Amount

Ledger

Amount

Total

Enrolment Fees (123456)

\$1,970.00

\$1,970.00

Subledger

Tax

Multiplier

Modifier Rules

GST Free

None

Allow Amount Adjustment

Links

Links for this Smart Fee will be used to determine whether it is displayed during the creation of a New Enrolment. A Smart Fee must have at least one Link Type to be a candidate during the creation of a New Enrolment.

Course

Diploma of Accounting (Course - Smart Fee)

Enrolment

Smart Fees

Smart Fee

\$1970.00

Line Items

Description

Amount

Multiplier

Tax

Tax Amount

Total

Category = Course

\$ 1970.00

None

GST Free

0.00

1970.00

New Line

Payment Terms

Use default payment terms

Payment will be due on

Proposed Payment Schedule

Cancel

Back

Next

Confirm Now

Smart Fees

Category = Unit

Here, we will be charging a cost per unit. Each unit will be charged the fee (here, \$175 each)

This enrolment has 11 units

We therefore charge \$1925 total

Smart Fee Library

Details

Name

Type

Category

Description

Category = Unit

Tuition Fee

Unit

Status

Pricing Period

Start Date

End Date

Approved

Settings

Agent Commission

Deferred Revenue

Discount (Code)

Enabled

Scholarships

☐

☐

☐

☐

\$ Amount

Ledger

Enrolment Fees (123456)

Amount

\$175.00

Total

\$175.00

Allow Amount Adjustment

Subledger

Tax

Multiplier

Modifier Rules

GST Free

None

Links

Links for this Smart Fee will be used to determine whether it is displayed during the creation of a New Enrolment. A Smart Fee must have at least one Link Type to be a candidate during the creation of a New Enrolment.

Course

Diploma of Accounting (Unit - Smart Fee)

Enrolment

Smart Fees

☐ Smart Fee

\$1925.00

Line Items

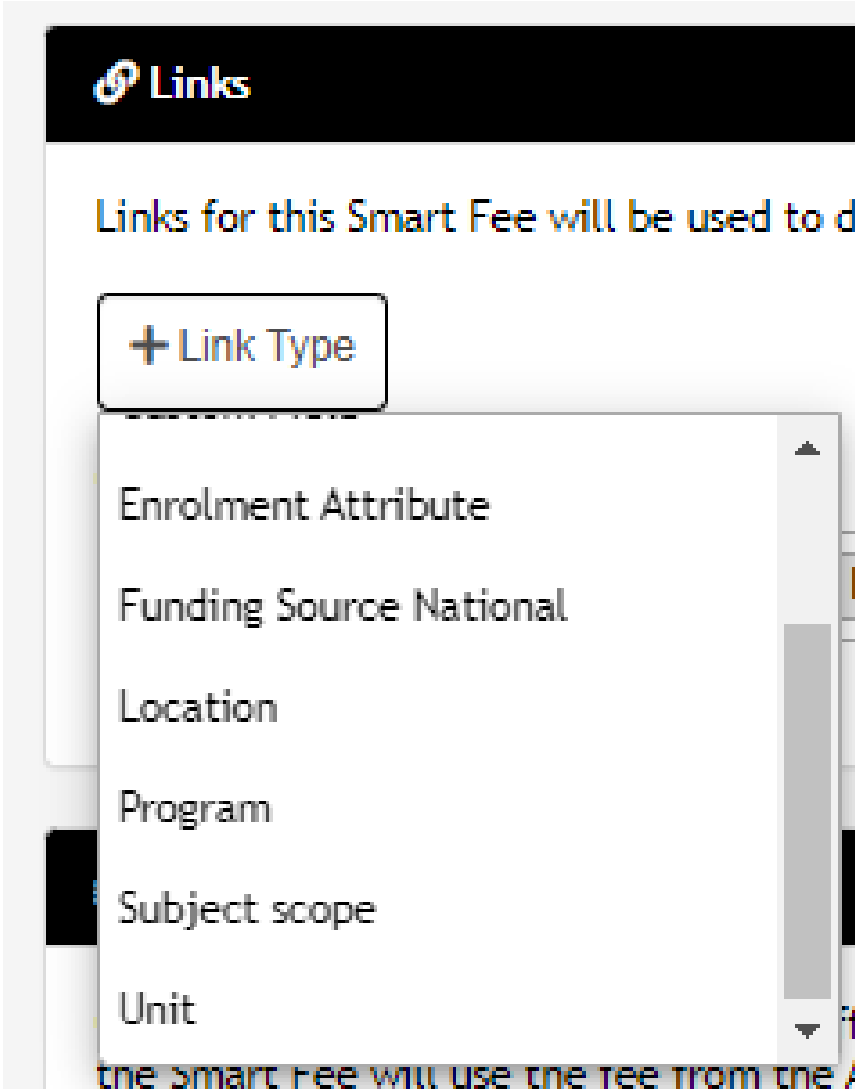
Description	Amount	Multiplier	Tax	Tax Amount	Total	
Category = Unit	\$ 175.00	None	GST Free	\$ 0.00	\$ 175.00	
Unit : Comply with financial services regulation and industry codes of practice (FNSFMK515)						
Category = Unit	\$ 175.00	None	GST Free	\$ 0.00	\$ 175.00	
Unit : Apply taxation requirements when providing tax (financial) advice services (FNSTPB516)						
Category = Unit	\$ 175.00	None	GST Free	\$ 0.00	\$ 175.00	
Unit : Apply ethical frameworks and principles to make and act upon decisions (FNSINC514)						
Category = Unit	\$ 175.00	None	GST Free	\$ 0.00	\$ 175.00	
Unit : Identify and apply complex ethical decision making to workplace situations (FNSINC513)						
Category = Unit	\$ 175.00	None	GST Free	\$ 0.00	\$ 175.00	
Unit : Design and produce complex spreadsheets (BSBTEC402)						
Category = Unit	\$ 175.00	None	GST Free	\$ 0.00	\$ 175.00	
Unit : Implement and maintain internal control procedures (FHSACC526)						

Smart Fees

Links

This is how we choose when we would like this SmartFee apply

For a SmartFee to apply to an enrolment, at least ONE link (e.g. program) must be made



Links

Links for this Smart Fee will be used to determine whether it is displayed during the creation of a New Enrolment. A Smart Fee must have at least one Link Type to be a candidate during the creation of a New Enrolment.

+ Link Type

Unit

× Provide First Aid (HLTAID011) ×

Smart Fees

☒ Smart Fee \$150.00 ^

Line Items

Description	Amount	Multiplier	Tax	Tax Amount	Total
Link type = Unit ×	\$ 150.00	None	GST Free	\$ 0.00	\$ 150.00

+ New Line

Links

Links for this Smart Fee will be used to determine whether it is displayed during the creation of a New Enrolment. A Smart Fee must have at least one Link Type to be a candidate during the creation of a New Enrolment.

+ Link Type

Course

× Diploma of Accounting (Course - Smart Fee) ×

Smart Fees

☐ Smart Fee \$1970.00 ^

Line Items

Description	Amount	Multiplier	Tax	Tax Amount	Total
Category = Course ×	\$ 1970.00	None	GST Free	\$ 0.00	\$ 1970.00

+ New Line

Payment Terms

Smart Fees

Trigger

Defines when the invoice will be created

Can be immediate or scheduled

Options will change as you fill in the settings

Trigger

ON

Method	Type	Target	Adjustment	Event
<div>Immediate</div>	<div>Invoice</div>	<div>Student</div>	<div>+/-0days</div>	<div>Enrolment Creation</div>

Enrolment Details

ENREA00177 / Hamish Shower (00020048)

Student:

Hamish Shower (00020048)

Course:

CSEREA00028 / First Aid April

Program:

HLTAID011 / Provide First Aid

Enrolment Status:

Active

GPA:

0

Enrolment ID:

ENREA00177

Start Date:

1/4/2023

Target End Date:

28/4/2023

End Date:

Brand:

Summary

Units

0%

Total Units: 1

Total Units Completed: 0

Attendance

0.00%

Scheduled Hours: 0.0

Attended Hours: 0.0

Invoiced

100.0%

Total Projected: \$150.00

Total Invoiced: \$150.00

Claims

0%

Total Claims: 0

Total Invoiced: 0

Person

Profile

Compliance

Career/Employment

Enrolments1 / 0

List All

Provide First Aid (First Aid April)

CSEREA00028 | 1/4/2023 - 28/4/2023

Certificates0

Finance

Quotes

Invoices

Payments

Accounts

Balance: \$-150.00

Schedule

Invoices

Hamish Shower (00020048)

New

1

\$150.00

\$0

\$150.00

\$150.00

\$0

Number of Invoices

Total Invoices

Total Payments

Total Outstanding

Non-Deferred Total Outstanding

Deferred Total Outstanding

Search

Search

Clear

Search Results

Invoice Date	Number	Type	Party	Course/Group	Description	Status	Invoiced	Paid	Deferred	Outstanding	
9/3/2023	INVREA00009	Invoice	Shower, Hamish	Provide First Aid (First Aid April)		Active	\$150.00	\$0.00	\$0.00	\$150.00	

Smart Fees

2A Linking to a Course (Manual)

Courses > Course list > Select Course > Finance > Payment Options

- 1. Select the smart fees option
- 2. Delete the line item at the bottom of the screen

Course

Timetable

Resource Manager

Course > Copy Course

Confirm Course to copy: Diploma of Accounting (Linking Smart Fees to a Course)

AVETMISS Code: FNS50222

Course Description: Diploma of Accounting

*New Start Date: 2/5/2023

*New End Date: 2/5/2024

Copy Default Enrolment Status: ☒

Copy Documents: ☒

Copy Event Series: ☒

Copy Events: ☒

Copy Include Course Forms: ☒

Copy Integration Settings: ☒

Copy Online Enrolment Settings: ☒

Copy Payment Options: ☒

* Note can be copied when duplicating course

Course

Students 3

Timetable

Notes / Checklists 0

Email

SMS

Documents 0

Letters & Forms

Certificates 2

Bulk Actions

Finance

Costs

Payment Options

Course > Certificate III in Bread Baking (S1 CIII Bread Baking) > Create > Payment Option

create

cancel

*Date From: 9/2/2023

Date To:

Type:

Option

Category:

Default Option:

*Payment Due Terms (Days):

Additional Payment Gateway Parameters:

*Name:

Description:

Available on: ☐ Course Application Forms ☐ Course Applications - Student Portal ☐ OEP ☐ Logged-in users of OEP only

Discount (Quantity):

Discount (Code): ☐ Enabled

Scholarships: ☐ Enabled

Items

Ledger	Line Item	C%	Employer Rate	Subledger	Amount (Excl. tax)	Deferred PNH	Revenue	Tax	Tax %	Tax Amount	Total (Incl. tax)
	Start Typing...	<input type="checkbox"/>	No override	Start Typi...	0.00	<input type="checkbox"/>	<input type="checkbox"/>	GST Free	0.0		0.0
Create	Scheduled	Invoice To	Student	+/- 0 days, On	All Enrolment Units Completed	Delete					
<div><div>+ New Line</div></div>											

create

cancel

Smart Fees

3. Use During Enrolment

Payments display in the enrolment wizard - you will see the linked smart fee

Select the smart fee

An invoice will then be created

Invoice viewable in the students party profile and student portal (if using)

COURSE

STUDENT PROFILE

COMPANY

ENROLMENT

UNITS

SCHEDULING

OUTCOMES

FEE\$

PAYMENTS
Apply your payment option

CONFIRM

Cancel

Back

Next

Confirm Now

No payment options available for this course

Search

Enter Name

Smart Fees

☒ Smart Fees

\$2200.00

Line Items

Description	Amount	Multiplier	Tax	Tax Amount	Total	
January 2023 Pricing - \$2,200.00	\$ 2200.00	None	GST Free	\$ 0.00	\$ 2200.00	<div>⚙️🗑️</div>

+ New Line

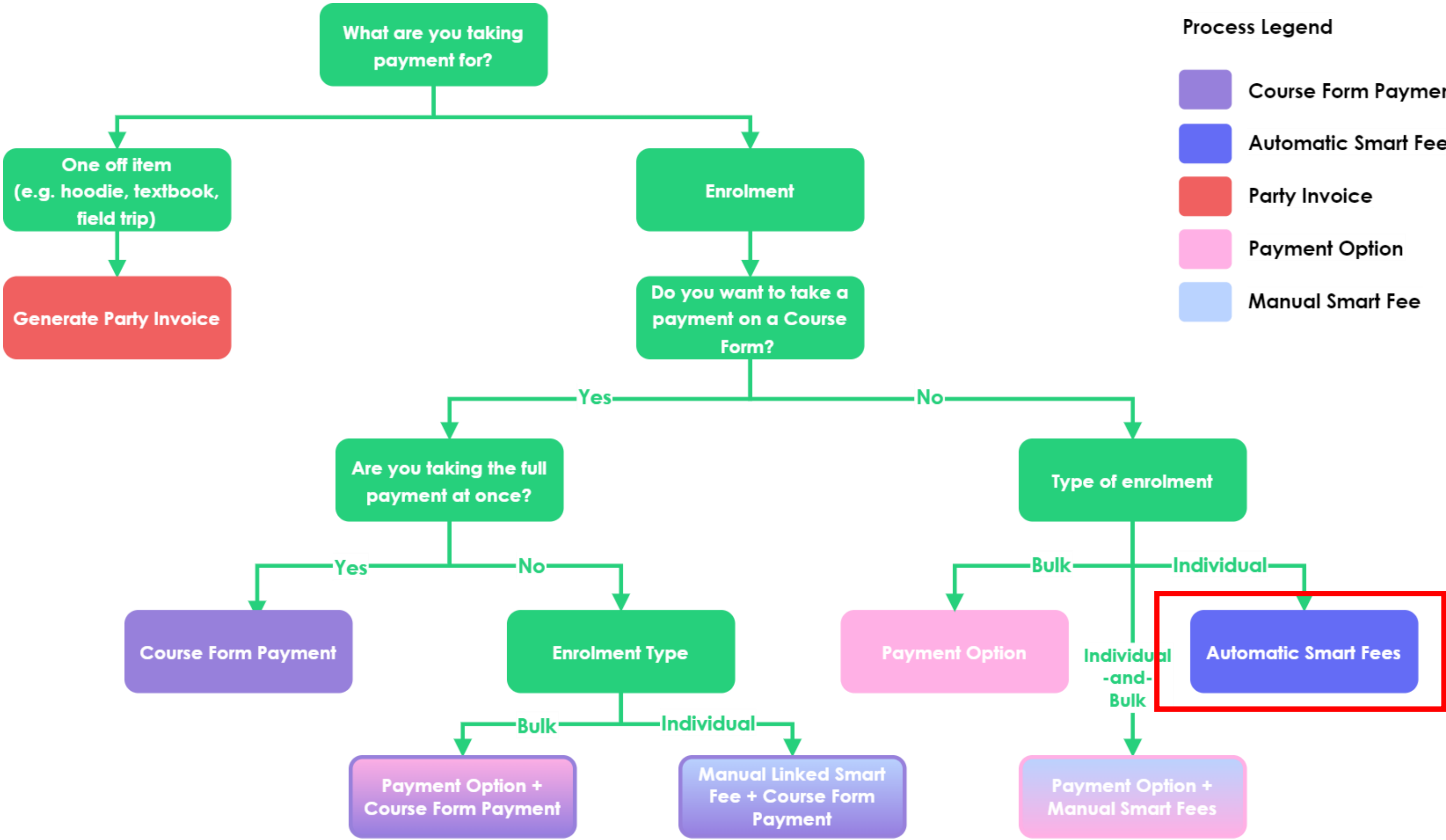
Lets go do it!

Let's take a look at:

- Creating a Smart Fee library
- How to link to a course
- View within an enrolment



Smart Fee Automatic



Smart Fees

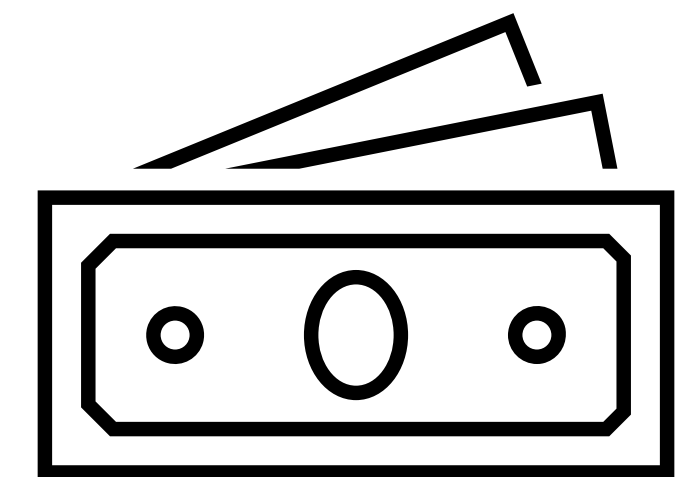
Overview

Smart fees let you

- Create a library of pre-defined fees
- Apply these fees to things like courses
- Create rules to dictate how certain fees should be used e.g. discounts or charged twice!

Smart fees are created by:

1. Setting up a smart fee library
2. Linking to a Course
 - A. Manually linking to course
 - B. Automatic Smart Fee
3. Use during enrolment



Smart Fees

1. Setting up a Smart Fee Library

Administration > Finance > Smart Fee Library > +

This is the same for Automatic Smart fees as the process is for manual.

Details

Name

Tuition Fees

Type

Tuition Fee

Category

Course

Description

Status

Approved

Pricing Period

Start Date

End Date

Settings

Agent Commission

Deferred Revenue

Discount (Code)

Enabled

Scholarships

Amount

Ledger

Enrolment Fees (123456)

Amount

\$ 9633.00

Total

\$ 9633.00

Allow Amount Adjustment

Subledger

Tax

GST Free

Multiplier

None

Modifier Rules

Links

Links for this Smart Fee will be used to determine whether it is displayed during the creation of a New Enrolment. A Smart Fee must have at least one Link Type to be a candidate during the creation of a New Enrolment.

+ Link Type

Program

Diploma of Accounting (FN550222)

Override Rules

Override Rules allow you to specify a different base fee when this Smart Fee is applied to an enrolment. The order to the Override Rules is important, the first one that matches for the enrolment will be applied. If no Override Rule matches then the Smart Fee will use the fee from the Amount section above.

Rule

Amount

Multiplier

Tax

+ Override Rule

Trigger

ON

Method

Immediate

Type

Invoice

Target

Student

Adjustment

+/- 0 days

Event

Enrolment Creation

Save

Cancel

Smart Fees

2B Linking Automatic Smart Fees

Automatic Smart fees let you:

- Reduce manual work during enrolment
- Skip creating payment options for a course

Two options for enabling/disabling automatic fees:

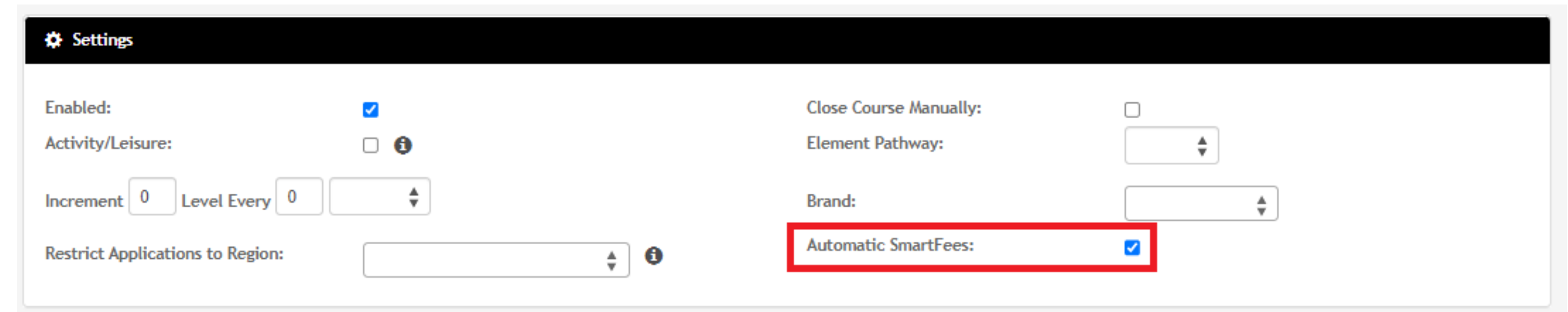
1. At the program level

Administration > Curriculum > Programs > New > Details > Settings

2. At the course level

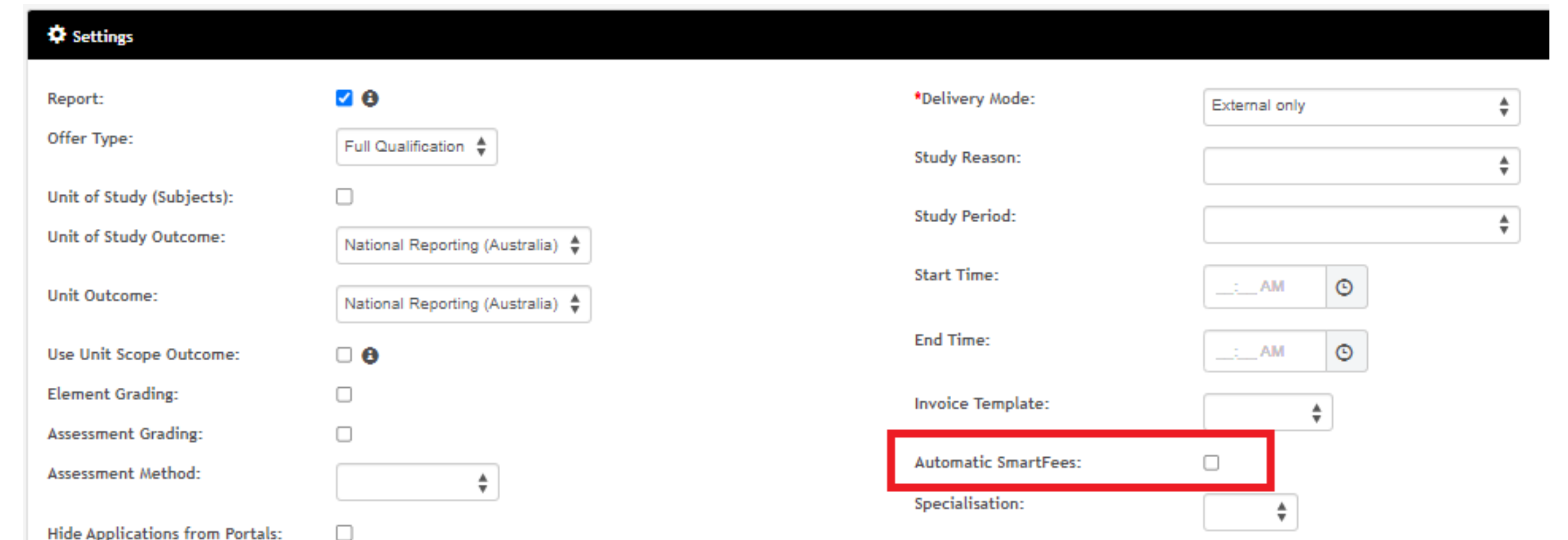
Courses > Course List > select course > Details > Settings

Program level



The screenshot shows the 'Settings' page for a program. The 'Automatic SmartFees' checkbox is checked and highlighted with a red box. Other settings include 'Enabled' (checked), 'Activity/Leisure' (unchecked), 'Increment' (0), 'Level Every' (0), 'Restrict Applications to Region' (dropdown), 'Close Course Manually' (unchecked), 'Element Pathway' (dropdown), 'Brand' (dropdown), and 'Automatic SmartFees' (checked).

Course level



The screenshot shows the 'Settings' page for a course. The 'Automatic SmartFees' checkbox is unchecked and highlighted with a red box. Other settings include 'Report' (checked), 'Offer Type' (Full Qualification), 'Unit of Study (Subjects)' (unchecked), 'Unit of Study Outcome' (National Reporting (Australia)), 'Unit Outcome' (National Reporting (Australia)), 'Use Unit Scope Outcome' (unchecked), 'Element Grading' (unchecked), 'Assessment Grading' (unchecked), 'Assessment Method' (dropdown), 'Hide Applications from Portals' (unchecked), 'Delivery Mode' (External only), 'Study Reason' (dropdown), 'Study Period' (dropdown), 'Start Time' (dropdown), 'End Time' (dropdown), 'Invoice Template' (dropdown), 'Automatic SmartFees' (unchecked), and 'Specialisation' (dropdown).

Smart Fees

2B Linking Automatic Smart Fees

E.g. of when you'd switch off

This program has auto smart fees enabled

All smart fees therefore apply to Course

We might switch off for one Course (e.g. July intake) if:

- Jan and April are courses that will be paid for by employers (generate an invoice and send to business)
- July is a public Course (requires upfront payment), so you want to use Course Form



Smart Fees

3. Use During Enrolment

Automatic smart fees display within Payments in Enrolment Wizard

The benefit is not having to link to a Course every time

New Enrolment

George Sprenke (00020063) in Automatic Smart Fees - CSEREA00020 (FNS50222) from 1/5/2023 to 1/5/2024

COURSE

STUDENT PROFILE

COMPANY

ENROLMENT

UNITS

SCHEDULING

OUTCOMES

FEE\$

PAYMENTS

Apply your payment option

CONFIRM

Cancel

Back

Next

Confirm Now

Smart Fees

Total: \$9,633.00

Bulk Actions

Description		Target	Amount (Incl Tax)
Tuition Fee Tuition Fee	\$9,633.00 Course: CSEREA00020	<div>Student</div>	9,633.00
Tuition Fee Total:			\$9,633.00

Cancel

Back

Next

Confirm Now

Lets go do it!

Let's take a look at:

- Show how to enable/disabling Automatic Smart Fees





Finance Hub

Finance Hub

Finance Hub lets you view

- Invoices
- Quotes
- Payments
- Etc

That have been made within the SMS

Sales > Finance Hub

Particularly useful for finance specialists within your organisation

Finance Hub

Quotes

Invoices

Payments

Family Payments

Unallocated Funds

Credits

Commissions

Reports

Search

Quote Name, Quote Number, Party Name

Filters

Saved Filters

Search

Save

Clear

Export

Search Results

Bulk Actions

1 - 1 of 1

1 Page

Name	Quote #	Party	Target	Description	Amount	Tax	Total	Status	Date	Exported
Quote 2023-02-07	QUOTE00002	Spencer Smith	Spencer Smith		\$1,150.00	\$0.00	\$1,150.00	Approved	7/2/2023	<div><div></div><div></div><div></div></div>

1 - 1 of 1

1 Page

Lets go do it!

Let's take a look at:

- The Finance hub



 **readytech**

Summary

What have we done today?

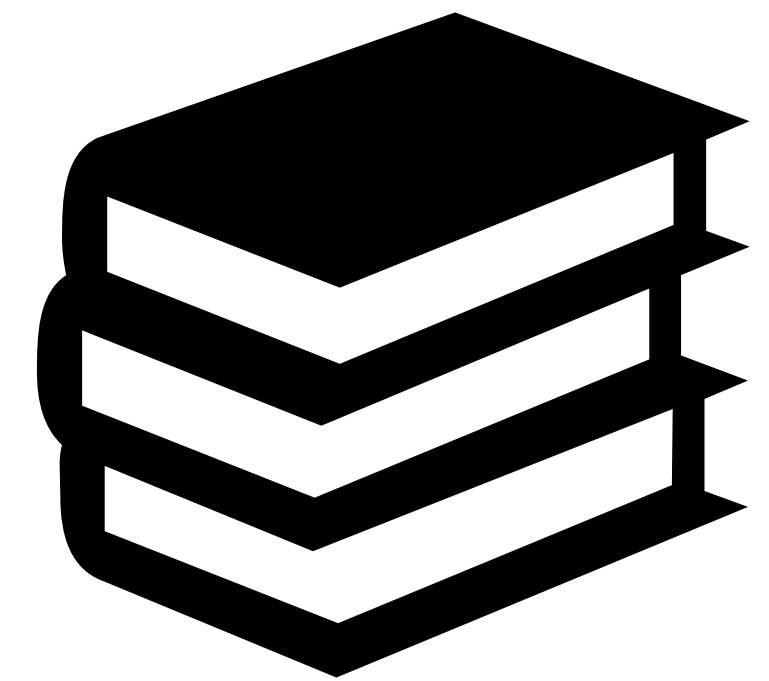
- Finance Preference
- Finance Options
- Party invoices
 - Quotes
 - Invoices
 - Payments
 - Refunds
 - Credit notes
- Taking payments on course forms
- Smart Fees
 - Manual
 - Automatic
 - When and how to use them
- Finance hub



Action Items

What do I need to do after today's session?

- Decide where you're taking payments and for what (use flow chart)
- Set up financial settings according to your choice, using the information from today
- Take a look at the Finance Hub and review what you have created

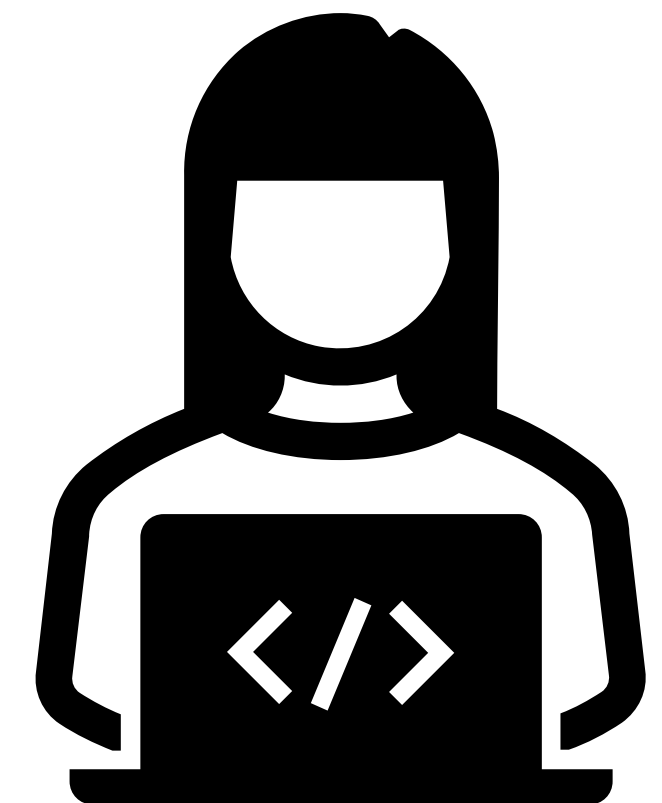


Enjoyed today's session?

[Please navigate to article here](#)

Here you will find all the information and resources for this series

- A copy of the PowerPoint slides
- Links for resources relevant to today's session
- Details on the materials required for upcoming sessions
- Booking links for upcoming sessions
- Recordings from today and previous sessions



Thank you

For more information please contact:

Support

- E: support@ewp.readytech.io
- P: 02 9018 5525

Onboarding

- E: customeronboarding@ewp.readytech.io

