

# Tuition Plan and Tuition Template



## Summary

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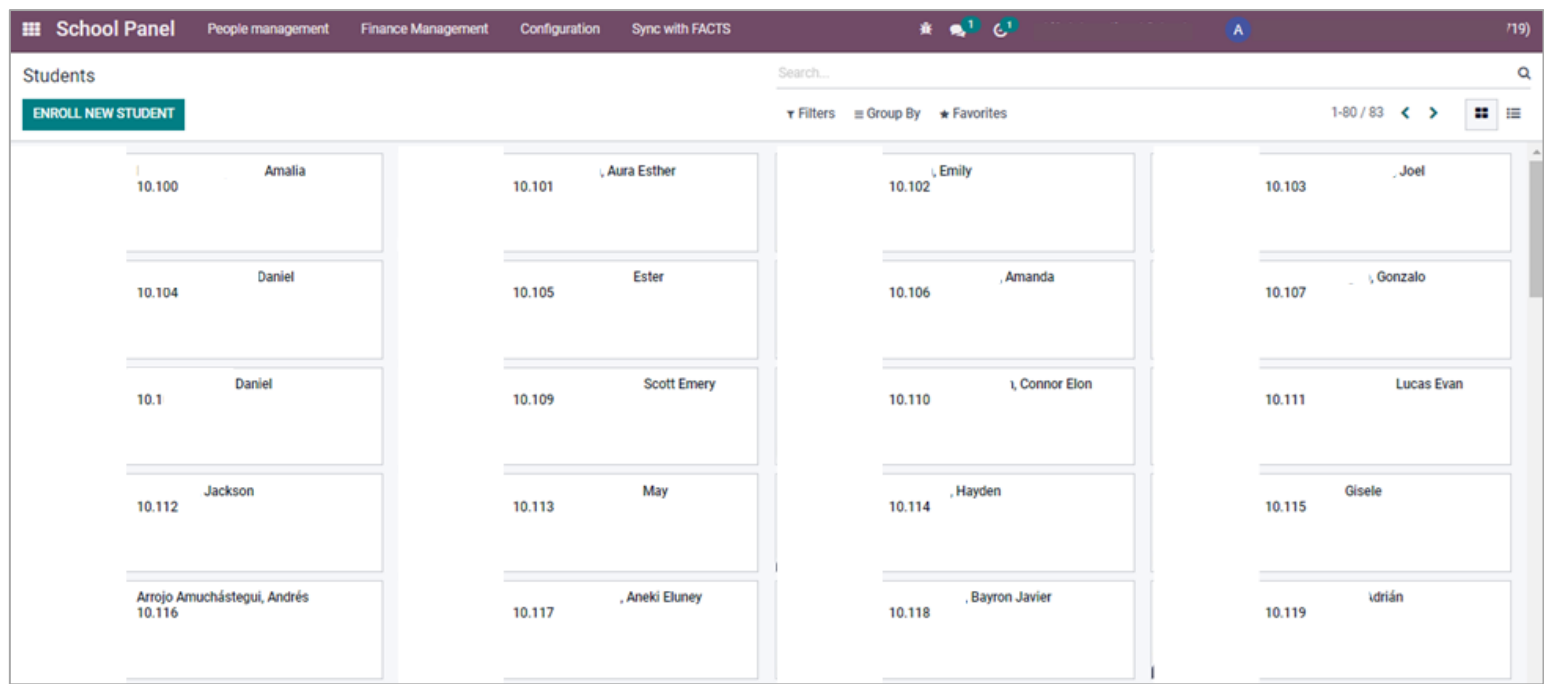




# 1 Introduction

On the School Panel landing page, the focus is on people management, which includes students, individuals, and families. If you have a FACTS account and Odoo Synchronization, the "Configuration" and "Sync with FACTS" sections will be automatically populated.

However, even if you don't have those accounts, the School Panel will still function. You can manually "enroll new students" and create families in the School Tuition Management module.



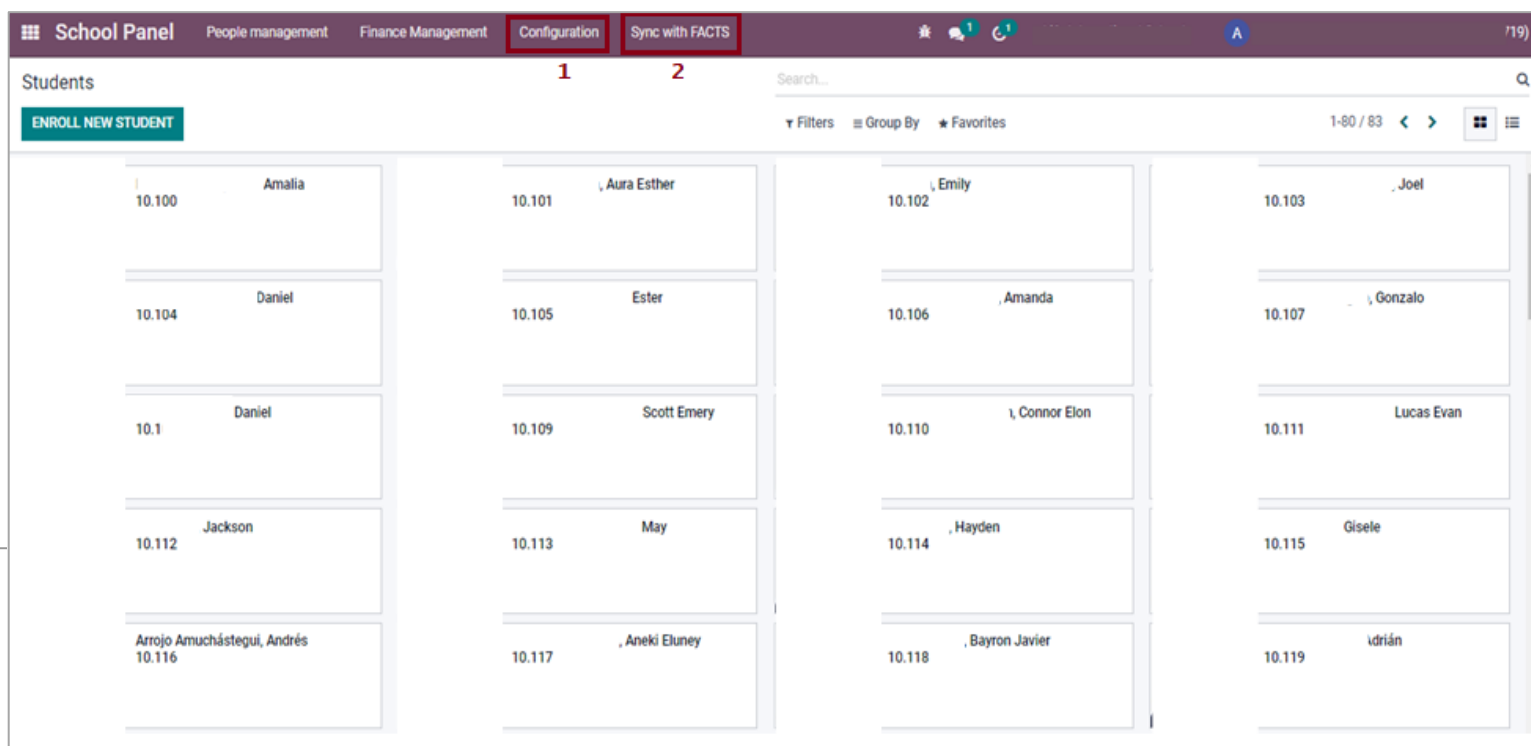
This document covers the step-by-step instructions.

## 2 Odoo Configuration

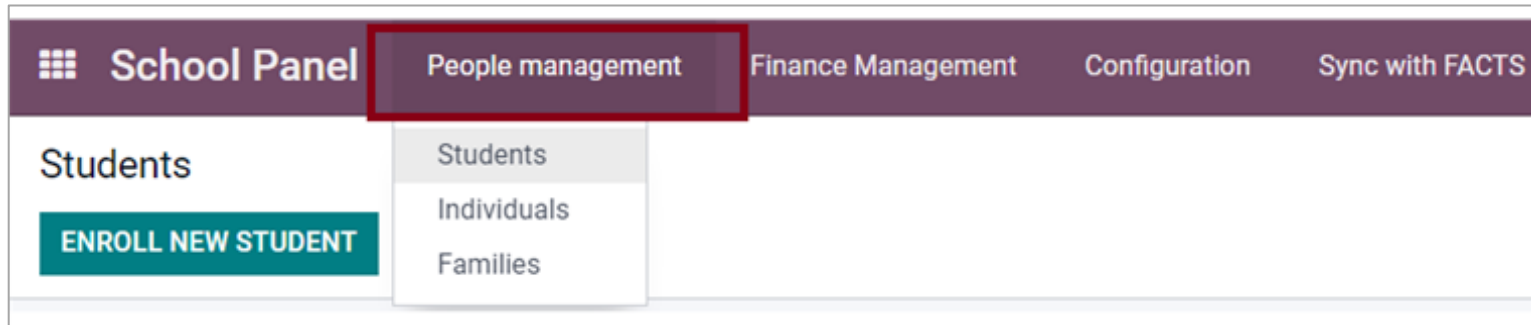
FACTS configuration will be set by EduWeb as part of the custom module installation

### 9.1 Configuration and Sync with FACTS

This configuration is necessary to enable the applications in a specific school year in Odoo Admissions to show in FACTS' list of importable students' documents.



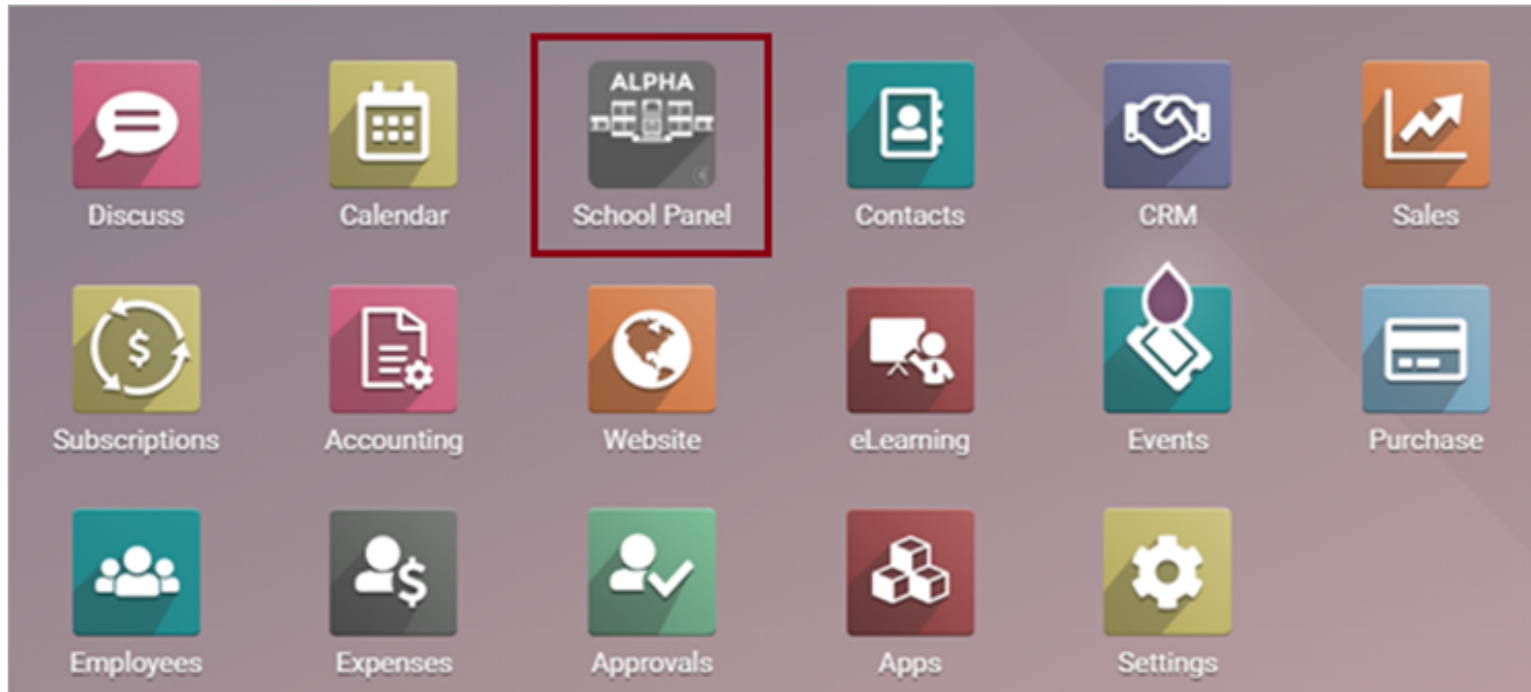
1. The School Panel is divided into three sections: Demographics, School Tuition Management, and Configuration & Sync with FACTS. Below is an image showing where you can find the (1) Configuration and (2) Sync with FACTS options.



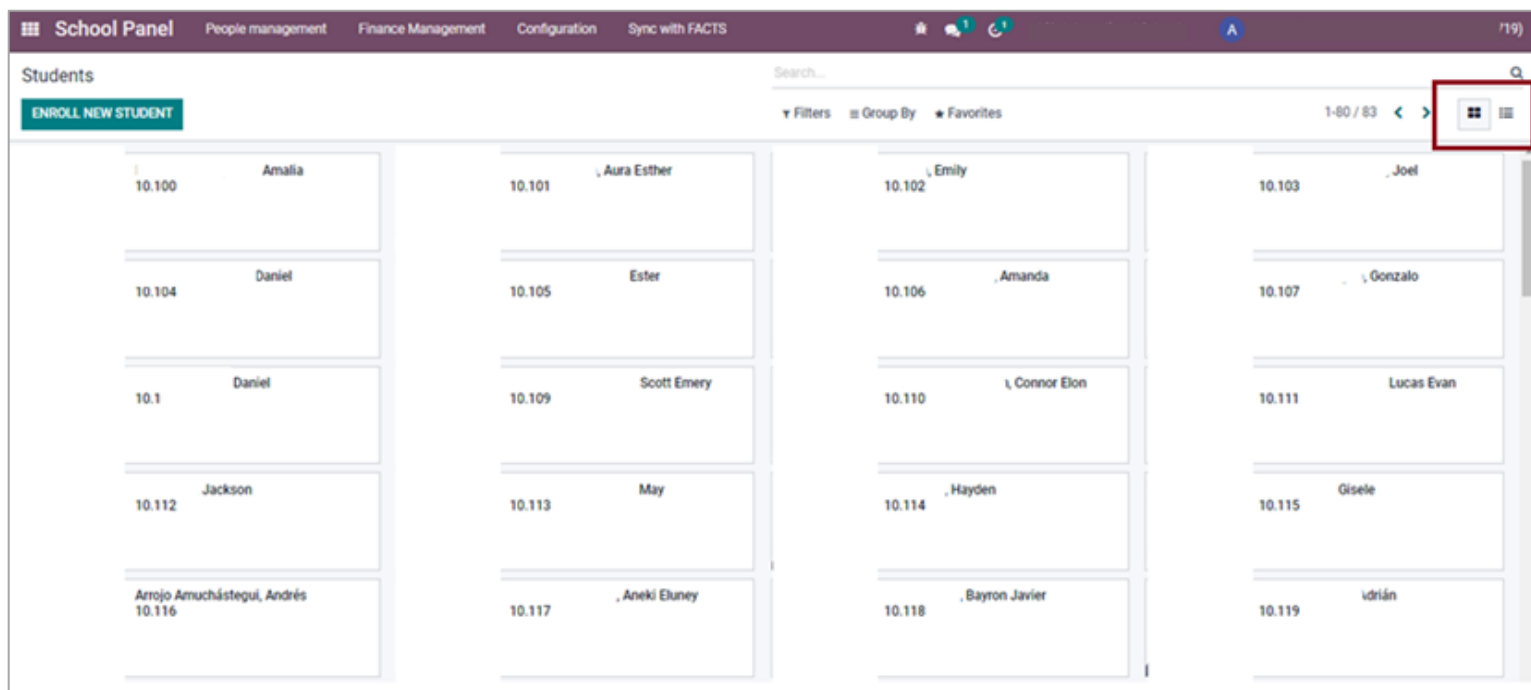
2. By navigating to "People Management," you can find the sections for Students, Individuals, and Families.

These are the automatically synced data from FACTS.

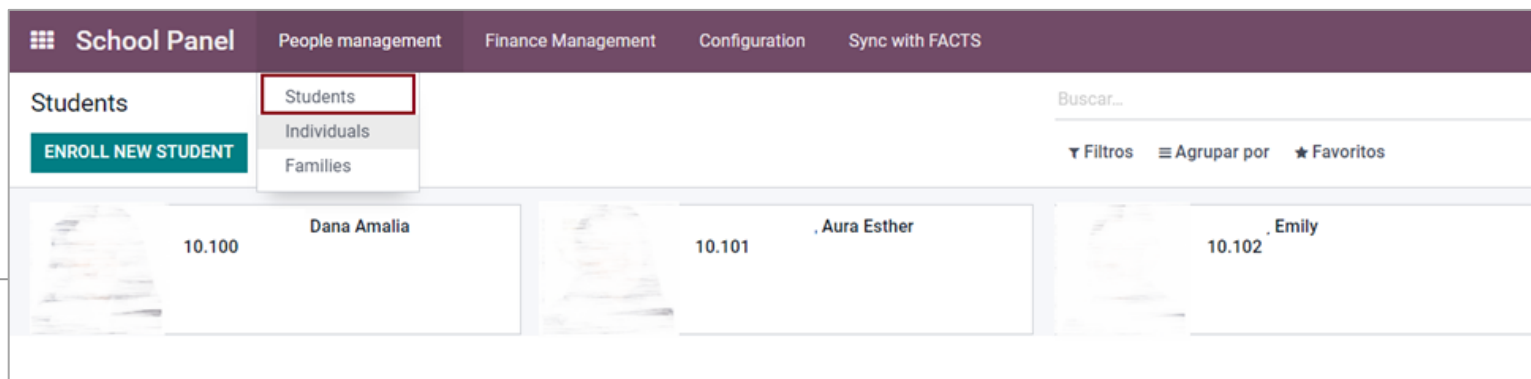
## 2.2 Demographics



1. From Odoo Menu, go to school panel.



2. After clicking on the School Panel, you have the option to change your preferred view between list view or Kanban view. You can find this option in the upper right-hand corner. It's worth noting that the list and Kanban view also apply to individuals and families.



3. To access the student's information, navigate to People Management and click on "Students." This action will display the image below. From there, you can select the specific student of your choice, and the landing page will show all the students.

School Panel

People management

Finance Management

Configuration

Sync with FACTS

Students /

Dana Amalia

EDITAR

ENROLL NEW STUDENT

MAKE CHARGE

Acción

Sync from WS

1 Tuition plans

Student

10.100

Amalia

First Name

Dana Amalia

Address partner link

Middle Name

Address

Last Name

Families

Relationships

Healthcare

Academics

Enrollment history

Other

Demographics

Finance

F

Family of

4. Inside the "Students" tile, you will see various tabs that display information about Families, Relationships, Healthcare, Academics, Enrollment History, Demographics, and Finance. These pieces of information are automatically populated from FACTS. You can verify the accuracy of the displayed information through the image provided.

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Page 9 of 100

Students /

GUARDAR

DESCARTAR

Sync from WS

Student

Flores Santana,

10.101

First Name

Aura Esther

Middle Name

Last Name

Address partner link

Address

Street 2...

Families

Relationships

Healthcare

Academics

Enrollment history

Other

Demographics

Finance

Individual

Relationship ty...

Custody

Corresponden...

Grade Related

Family Port...

Emergency contact

Invoice recipie...

Flores Morales, -

Father

☒

☒

☐

☒

☒

☒

☒

Mother

☒

☒

☐

☒

☒

☒

Agregar linea

5. Navigating to the "Relationship" tab, this feature allows you to see the connections between students and their associated individuals.

School Panel

People managementFinance ManagementConfigurationSync with FACTS

Students / Flores

Amalia

EDITAR

ENROLL NEW STUDENT

MAKE CHARGE

Acción

WS

Tuition pla...

Student

10.100

, Dana Amalia

First Name

Dana Amalia

Address partner link

Middle Name

Address

Last Name

Flores Santana

Families

Relationships

Healthcare

Academics

Enrollment history

Other

Demographics

Finance

Financial responsibilities

Family

Family of

Family of

Agregar línea

Category

Tuition

Student Fees

Percentage (%)

100%

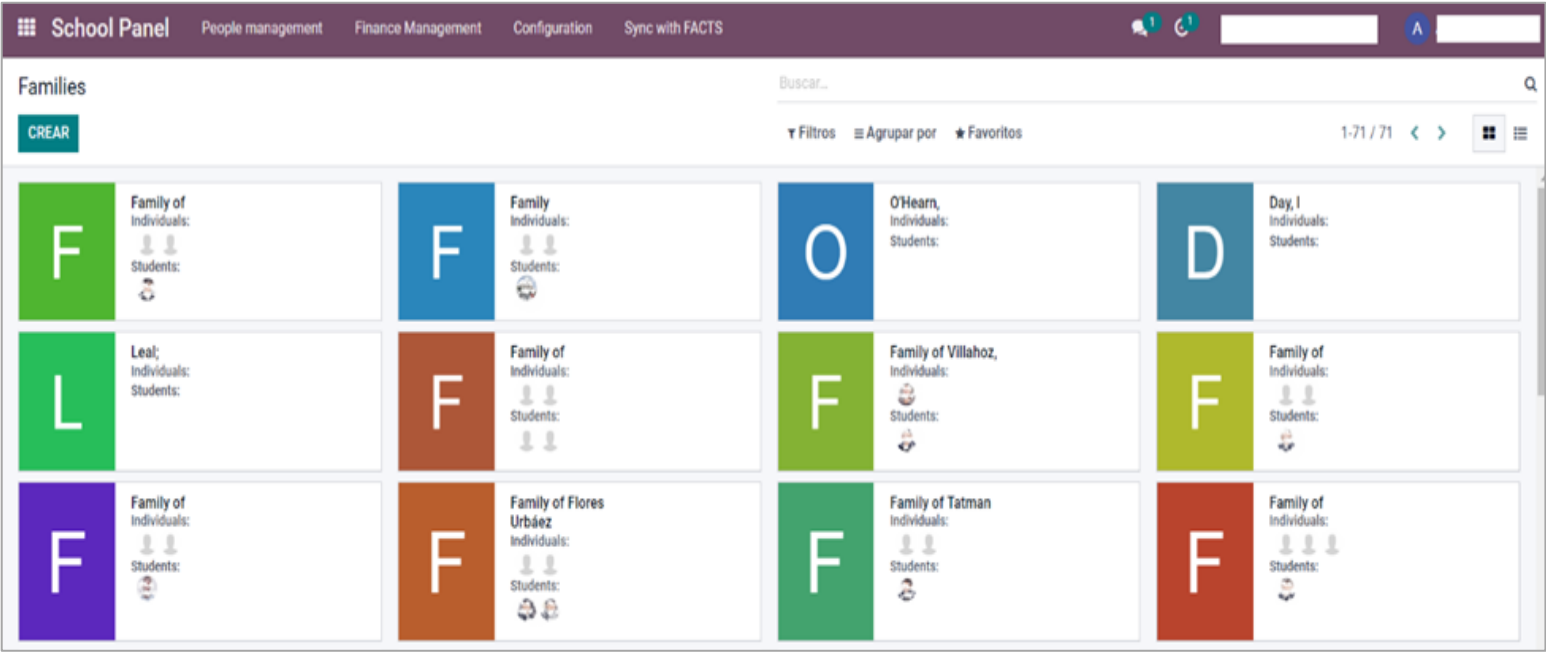
100%

6. In the "Finance" section, you can view the Financial Responsibilities, which includes the ability to add or remove families invoice assignment, if necessary.

You can also set the base percentages for different products categories amongst the families totaling 100%.

It's important to note that only linked families can be added in this section. The purpose of this feature is to which family to invoice of a specific category. If the configuration is not properly set up, an error may occur when processing an invoice.

7. Individuals are found in the "People Management". This shows all non-students' information on this part.



8. To access the family information, go to "People Management" and click on "Families." The displayed image shows various details such as individuals, students, and finance. These details are synchronized from FACTS.

School Panel

People management

Finance Management

Configuration

Sync with FACTS

Families / Family of Castro Veloza

EDITAR


CREAR

Acción

Sync from WS

Family

Family of



Facts ID



Individuals



Students

Academics

Other

Finance

 , Javier Enrique 

 Annie 

9. From the list of families, you have the option to select and edit the specific family you want to modify. This allows you to make changes or updates to the selected family's information according to your requirements.

School Panel

People management

Finance Management

Configuration

Sync with FACTS

Families / Family of

EDITAR

CREAR

Acción

Sync from WS

Family

Family of

Facts ID

Individuals

Students

Academics

Other

Finance

Invoice Address

, Annie

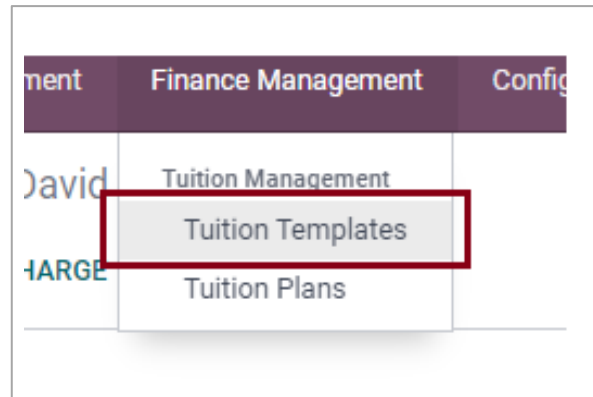
Filter Invoice Address

Parents only

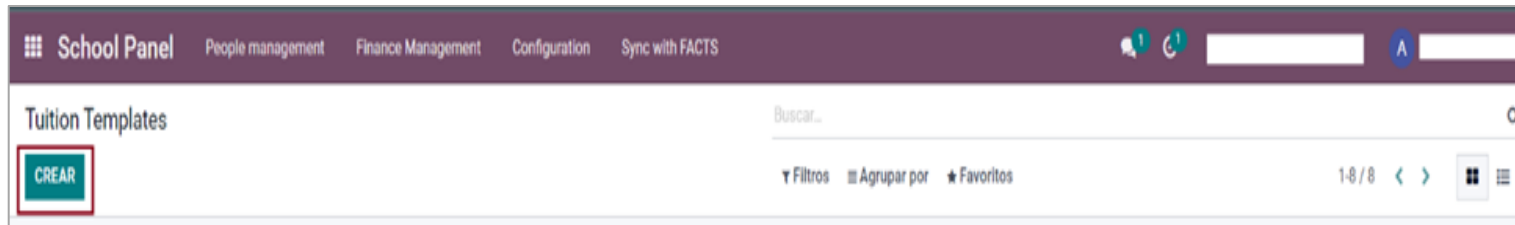
Allow

10. In the finance tab, you can view the invoice address. The invoice address is set for one of the individuals within the family. When issuing an invoice to this family, the invoice address will be automatically used as the customer address. This ensures that the correct address is associated with the invoice and facilitates smooth communication and delivery of financial documents.

### 3 School Tuition Management



1. To view the tuition fees for each grade level, go to Finance Management and click on 'Tuition Template'.



2. Click “create”.

School Panel

People management

Finance Management

Configuration

Sync with FACTS

Tuition Templates / Nuevo

GUARDAR

DESCARTAR

NEW TUITION PLAN

Name

Program

▼

↗

Pricelist Option

Fixed prices

▼

Default journal

Customer Invoices

▼

↗

Payment terms

▼

Lines

Installments

Discounts

Recurring options

Installment template

Quarterly

▼

Name	Type	Day type	Day of the month	Month	Real date	
↕ Q1	Quarterly	First day	0	September	01/09/2023	🗑
↕ Q2	Quarterly	First day	0	December	01/12/2023	🗑
↕ Q3	Quarterly	First day	0	March	01/03/2024	🗑
↕ Q4	Quarterly	First day	0	June	01/06/2024	🗑
Agregar linea						

3. After clicking "Create", you will need to set up the installments. To do this, navigate to the "Installments" section. Here, you can define the specific installment plans and payment schedules according to your requirements.

Lines

Installments

Discounts

Recurring options

Installment template

Monthly

Name	Type	Day type	Day of the month	Month	Real date	
September	Monthly	First day	0	September	01/09/23	
October	Monthly	First day	0	October	01/10/23	
November	Monthly	First day	0	November	01/11/23	
December	Monthly	First day	0	December	01/12/23	
January	Monthly	First day	0	January	01/01/24	
February	Monthly	First day	0	February	01/02/24	
March	Monthly	First day	0	March	01/03/24	
April	Monthly	First day	0	April	01/04/24	
May	Monthly	First day	0	May	01/05/24	
June	Monthly	First day	0	June	01/06/24	
Add a line						

4. After going the 'Installment' tab and choose your preferred option by clicking on the drop-down option.

Tuition Templates / Nuevo

GUARDAR

DESCARTAR

NEW TUITION PLAN

Name

Program

Pricelist Option

Fixed prices

Default journal

Customer Invoices

Payment terms

Lines

Installments

Discounts

Recurring options

Sibling Discounts

Discount Option

Status Type

Discount Product/s

Filter School Structure

Discount Product

Child number

Category

Discount %

Agregar línea

5.If you need to apply a sibling discount, you can do so by going to the "Discount" tab. In this section, you can input the correct information related to the sibling discount. By specifying the applicable discount details, you can ensure accurate calculations and adjustments for tuition fees involving siblings.

Tuition Templates / Grades1-3

GUARDAR DESCARTAR

NEW TUITION PLAN

Name  
**Grades1-3**

Program  Pricelist Option Fixed prices

Default journal Customer Invoices

Payment terms Pago inmediato

Lines Installments Discounts **Recurring options**

Sales Accounting

Invoice Method Sale order Fiscal Position

Post-action option Confirm Tax Country

Analytic account

Mailing

Sale order/quotation mail template Tuition plan: Sale order/quotation

Invoice mail template Tuition plan: Invoice

6. Go to 'Recurring Options' and select the preferred invoice method if you want invoice/sales order.

Post-action option – is the system automation once the set installment dates arrive. You can choose between “Confirm” which means the invoice or Sales Order will be posted automatically; or “Confirm and send” to post and send to the invoice address; or “Do nothing” to have the invoice/SO in draft status.

Lines

Installments

Discounts

Recurring options

Product	Descripti...	Installments	Account	Quantity	Default unit pri...	Tax...	Discount	Subtotal	
New T ▾	New Tuition	September ✕ October ✕ November ✕ December ✕ January ✕ February ✕ March ✕ April ✕ May ✕ June ✕ ▾	700000 Sales of goods in ▾	10,00	345,00 €	-	0,00	3.450,00 €	
Add a line									

7. To set the default months for installments, navigate to the "Lines" section and select 'Installments' from the drop-down menu. It is recommended to choose all the months as the default option. This allows for a standardized and consistent installment schedule across the board, simplifying the process for managing tuition payments.

School Panel

People management

Finance Management

Configuration

Sync with FACTS

Tuition Templates / Grades1-3

GUARDAR

DESCARTAR

NEW TUITION PLAN

Name

Grades1-3

Program

▼

✎

Pricelist Option

Fixed prices

▼

Default journal

Customer Invoices

▼

✎

Payment terms

Pago inmediato

▼

✎

Lines

Installments

Discounts

Recurring options

Product	Description	Installments	Account	Quantity	Default unit pri...	Tax...	Discount	Subtotal	
⇅ Mensualid...	Tuition	<div>September</div> <div>October</div> <div>November</div> <div>December</div> <div>January</div> <div>February</div> <div>March</div> <div>April</div> <div>May</div> <div>June</div>	700000 Tuitl...	1,00	1,00 €		0,00	1,00 €	🗲
Agregar linea									

8. To set up your invoice method, click on the dropdown button of "Payment Terms" and select your preferred option. This feature can also be used to give cash discounts for early payments.

Tuition Templates / Grades1-3

GUARDAR

DESCARTAR

NEW TUITION PLAN

Name

Grades1-3

Program

Pricelist Option

Fixed prices

Default journal

Customer Invoices

Payment terms

Pago inmediato

Lines

Installments

Discounts

Recurring options

Product	Description	Installments	Account	Quantity	Default unit pri...	Tax...	Discount	Subtotal	
Mensualid...	Tuition	<div>SeptemberOctoberNovemberDecemberJanuaryFebruaryMarchAprilMayJune</div>	700000 Tuiti...	1,00	1,00 €		0,00	1,00 €	

Agregar línea

9. Now you can set up and put the information for “Product”, “Description” and “Default Price”.

Save.

Tuition Templates / Grades1-3

GUARDAR

DESCARTAR

NEW TUITION PLAN

Name

Grades1-3

Program

Pricelist Option

Fixed prices

Default journal

Customer Invoices

Payment terms

Pago inmediato

Lines

Installments

Discounts

Recurring options

Product	Description	Installments	Account	Quantity	Default unit pri...	Tax...	Discount	Subtotal
⇅ Mensualid...	Tuition	<div>September</div> <div>October</div> <div>November</div> <div>December</div> <div>January</div> <div>February</div> <div>March</div> <div>April</div> <div>May</div> <div>June</div>	700000 Tuiti...	1,00	1,00 €		0,00	
Agregar línea								

Product

Installments

Account

Grade levels

Domain

Journal

Taxes

Discount

Subtotal

10. To view and edit the financial template for each grade level, navigate to Finance Management and click on the 'Tuition Template' option. Within the template, you will find three dots on the left side, which provide options to edit or remove unnecessary lines. By selecting the appropriate option, you can make changes to the financial template as needed, ensuring it aligns with the specific requirements of each grade level.

Name	Type	Day type	Day of the month	Month	Real date	
September	Monthly	First day	0	September	01/09/2023	
October	Monthly	First day	0	October	01/10/2023	
November	Monthly	First day	0	November	01/11/2023	
December	Monthly	First day	0	December	01/12/2023	
January	Monthly	First day	0	January	01/01/2024	
February	Monthly	First day	0	February	01/02/2024	
March	Monthly	First day	0	March	01/03/2024	
April	Monthly	First day	0	April	01/04/2024	
May	Monthly	First day	0	May	01/05/2024	
June	Monthly	First day	0	June	01/06/2024	

11. To modify the settings of the installments, click on the specific month that you wish to edit. This action allows you to make changes to the installment details for that month.

Lines

Installments

Discounts

Recurring options

Product	Descripti...	Installments	Account	Grade levels	Quantity	Default unit pri...	Tax...	Discount	Subtotal	
⌵ New Tuition	New Tuition	<div>September</div> <div>October</div> <div>November</div> <div>December</div> <div>January</div> <div>February</div> <div>March</div> <div>April</div> <div>May</div> <div>June</div>	700000 Sales of goods in Spa...	<div>P3</div> <div>P4</div>	10,00	345,00 €		0,00	<div><div><input checked="" type="checkbox"/> Product</div><div><input checked="" type="checkbox"/> Installments</div><div><input checked="" type="checkbox"/> Account</div><div><input checked="" type="checkbox"/> Grade levels</div><div><input type="checkbox"/> Domain</div><div><input type="checkbox"/> Journal</div><div><input checked="" type="checkbox"/> Taxes</div><div><input checked="" type="checkbox"/> Discount</div><div><input checked="" type="checkbox"/> Subtotal</div></div>	

12. Lastly, indicate the “Grade Level”.

## 4 How To Create Tuition Plans

People management	Finance Management	Configuration
	Tuition Management Tuition Templates Tuition Plans	

1. To access the "Tuition Plan" section, navigate to Finance Management and click on "Tuition Plan."

Pre-K Half Day

NEW TUITION PLAN

CONFIGURATION

Paid

100\$

Income

Due

2. To create a new tuition plan, go to Tuition Templates then click "New Tuition Plan".

Odoo

Post tuition plans

☒

Students

Name	Facts ID	UDID
Add a line		

Cancel

CONFIRM

3. Then add students for the tuition plan, by clicking (1) “add a line”. Then tick those students that you want to create Tuition Plans, then (2) select. Then click “Confirm”.

Añadir: Students

MAKE A CHARGE

80 seleccionado

→ Seleccionar todo 82

Buscar...

🔍

⚙️ Filtros

≡ Agrupar por

★ Favoritos

1-80 / 82

◀ ▶

⚙️ Acción

<input checked="" type="checkbox"/>	Nombre	Facts ID	UDID
<input checked="" type="checkbox"/>	Flores Santana,	10100	
<input checked="" type="checkbox"/>	Flores Santana,	10101	
<input checked="" type="checkbox"/>	Tatman,	10102	
<input checked="" type="checkbox"/>	González	10103	
<input checked="" type="checkbox"/>	Cordero	10104	
<input checked="" type="checkbox"/>	Cordero Gómez-Lor,	10105	
<input checked="" type="checkbox"/>	Sanchez Dimitrova,	10106	
<input checked="" type="checkbox"/>	Alcántara Rengifo,	10107	
<input checked="" type="checkbox"/>	Herrera,	10108	
<input checked="" type="checkbox"/>	Bolles	10109	
<input checked="" type="checkbox"/>	Bolles	10110	
<input checked="" type="checkbox"/>	Bolles	10111	

SELECCIONAR

CREAR

CANCELAR

School Panel

People management

Finance Management

Configuration

Sync with FACTS

1

1

A

Tuition Templates / Tuition Plans

CREAR

Buscar...

▼ Filtros

≡ Agrupar por

★ Favoritos

1-80 / 80

<

>

TP/

Total:

TP

Total: 0,00 €

TP Emily

Total: 0,00 €

TP

Total: 0,00 €

TP/2023/000048

Total:

TP,

Total: 861,00 €

TP/2023/000050

Total: 0,00 €

TP

Total: 930,00 €

4. After that, you're going to see now the updated "Tuition Plans".

School Panel

People management

Finance Management

Configuration

Sync with FACTS

Tuition Templates / Tuition Plans / TP/

EDITAR

CREAR

Acción

CANCEL

CREATE CHARGES

UPDATE VALUES

DRAFT

POSTED

CANCELLED

\$ 1 Sales

TP/

Student

Tuition Template

Next installment

To Charge

Student grade levels

Pre-K - Half Day

October

P4

Program

Default journal

Payment terms

Merge group

Customer Invoices

Pago inmediato

Lines

Installments

Sibling Students

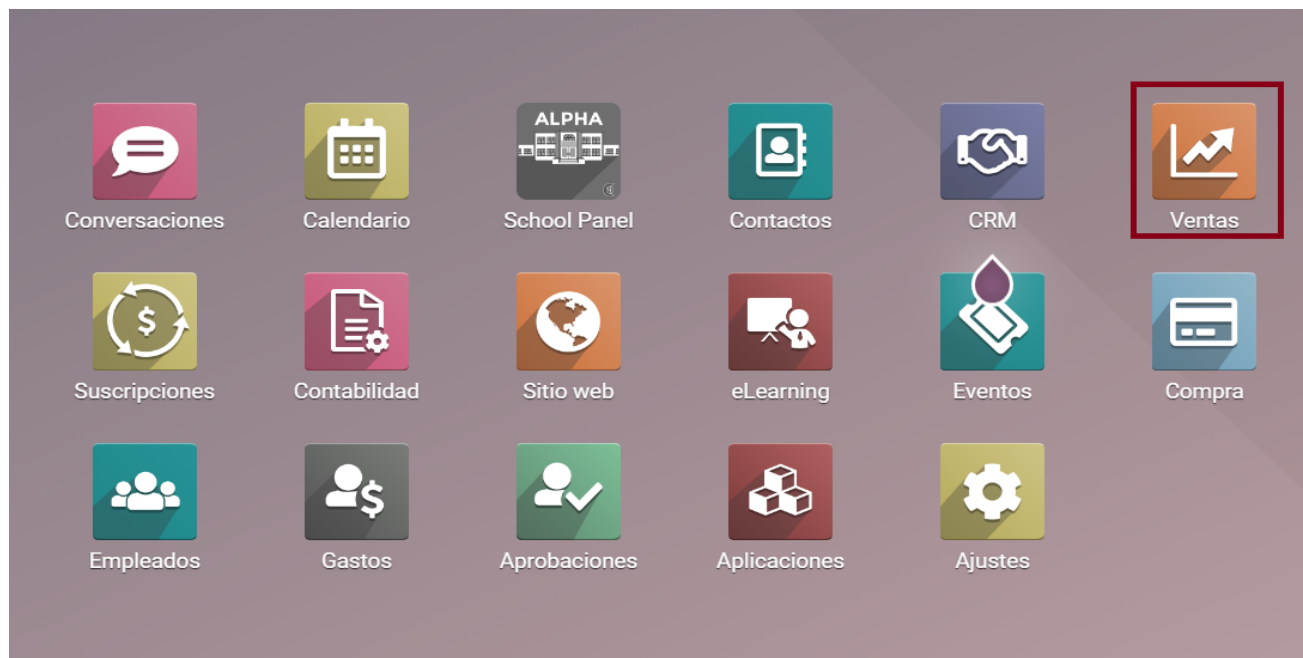
Recurring options

Product	Description	Installments	Account	Quantity	Unit price	Tax...	Subtotal
Mensualidad	Tuition	<div>September</div> <div>October</div> <div>November</div> <div>December</div> <div>January</div> <div>February</div> <div>March</div> <div>April</div> <div>May</div> <div>June</div>	700000 Tuition	1,00	345,00 €		276,00 €
Registration - Existi...	Registration	<div>September</div>	700000 Tuition	1,00	75,00 €		75,00 €
School Materials	School Materials	<div>September</div>	700200 Student Fees	1,00	280,00 €		280,00 €
Capital Fund	Capital Fund	<div>September</div>	700200 Student Fees	1,00	230,00 €		230,00 €
Total:							861,00 €

5. You can review the individual tuition plans created.

If not yet posted, you can post the tuition plan, then the system will automatically generate the invoice/sales order on the scheduled installment date and perform the post-action set on the tuition template.

If you need to generate the next installment in advance, you can click on “Create Charges”. The customer can view the invoice/quotation by logging in to their portal provided that the parent's login is already activated.



6. If you want to send the sales order via email. Go to “Sales”.

Ventas

Pedidos

A facturar

Productos

Informes

Configuración

1

1

A

Presupuestos

Mis presupuestos

Buscar...

▼ Filtros

≡ Agrupar por

★ Favoritos

1-1 / 1

CREAR

<input type="checkbox"/>	Número	Fecha de Creación	Cliente	Comercial	Actividad siguiente	Total	Estado
<input type="checkbox"/>	S00011	16/05/2023	Juan Daniel	A		861,00 €	Pedido de venta
						861,00	

7. Then go to the sales order that you need and click it.

Ventas

Pedidos

A facturar

Productos

Informes

Configuración

Presupuestos / S00011

EDITAR

CREAR

Imprimir

Acción

CREAR FACTURA

ENVIAR POR CORREO ELECTRÓNICO

CANCELAR

PRESUPUESTO

PRESUPUESTO ENVIADO

PEDIDO DE VENTA

Cliente

Previsualiz...

S00011

Cliente

Fecha de pedido

16/05/2023 07:56:39

Plazos de pago

Pago inmediato

Dirección de factura

Juan Daniel

Dirección de entrega

Juan Daniel

Students

Dana Amalia

Family

Grade Level

P4

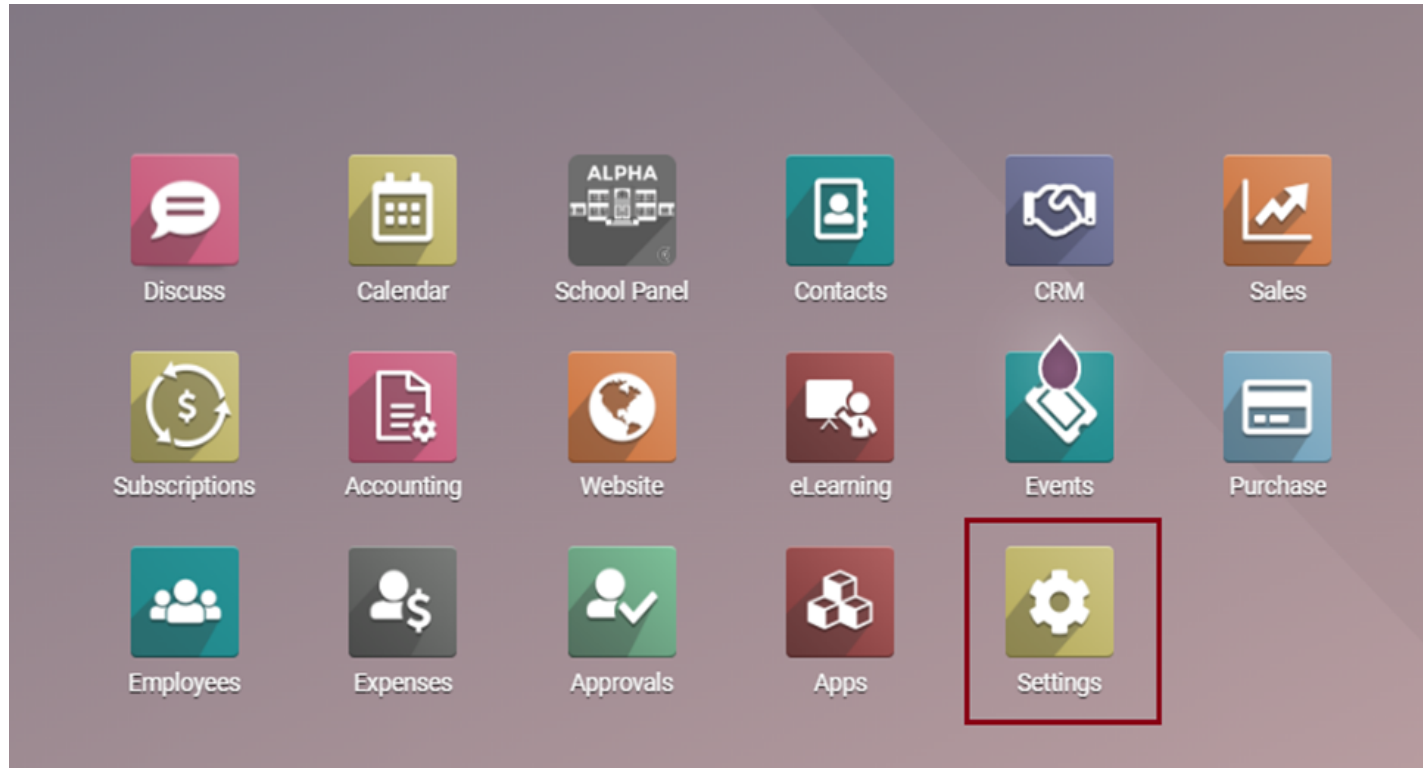
Program

School

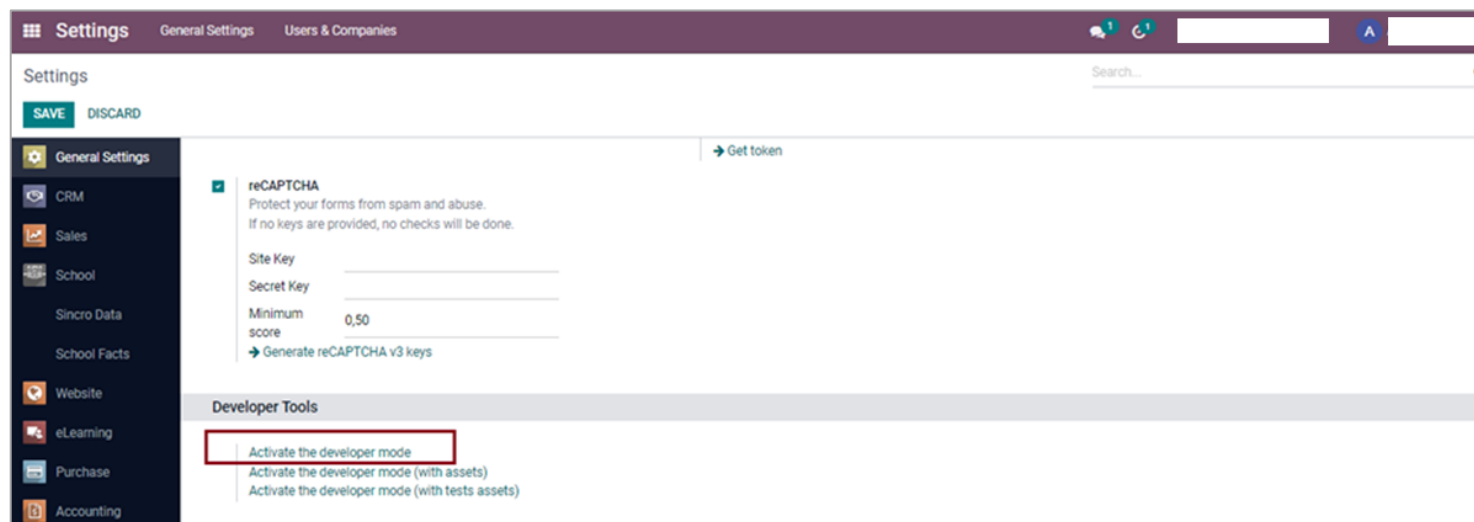
District

8. Then after checking all information, click “Send by email”.

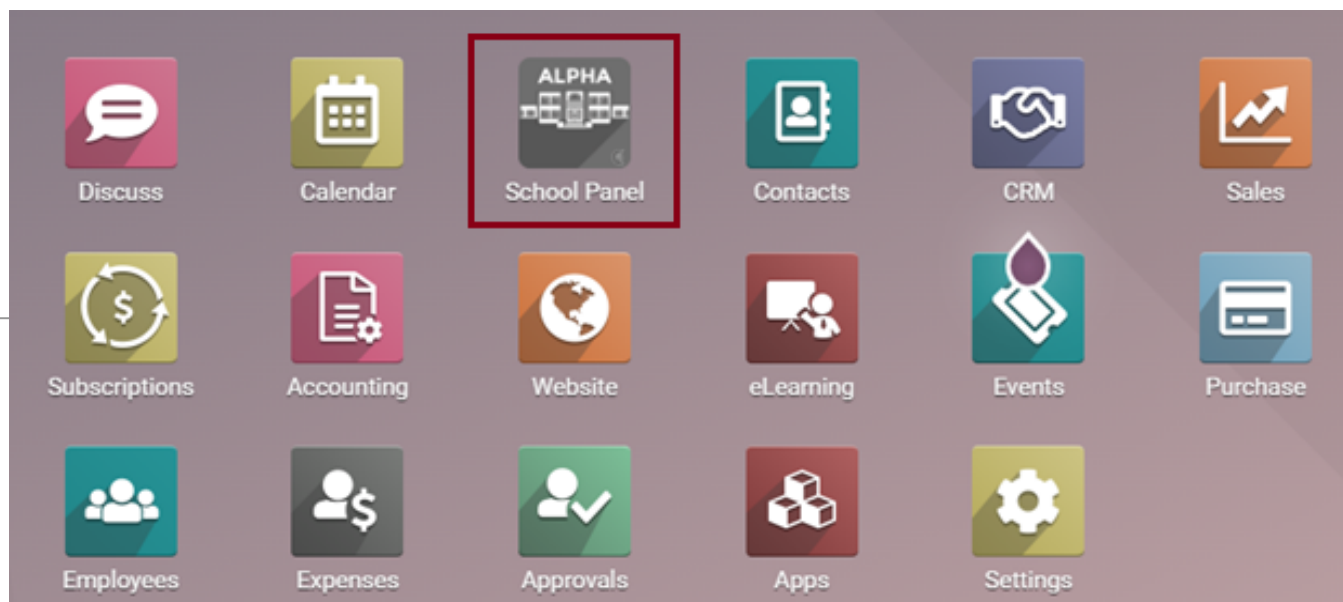
## 5 Advanced Features : How To Create Tuition Plan For Next Year



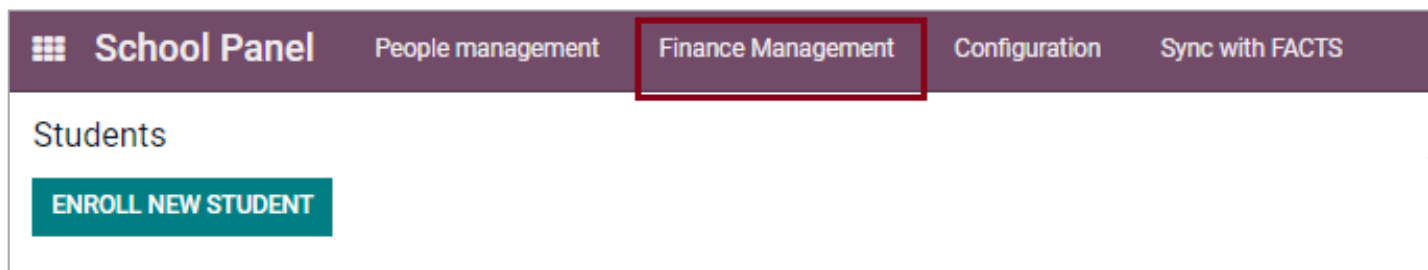
1. Go to "Settings".



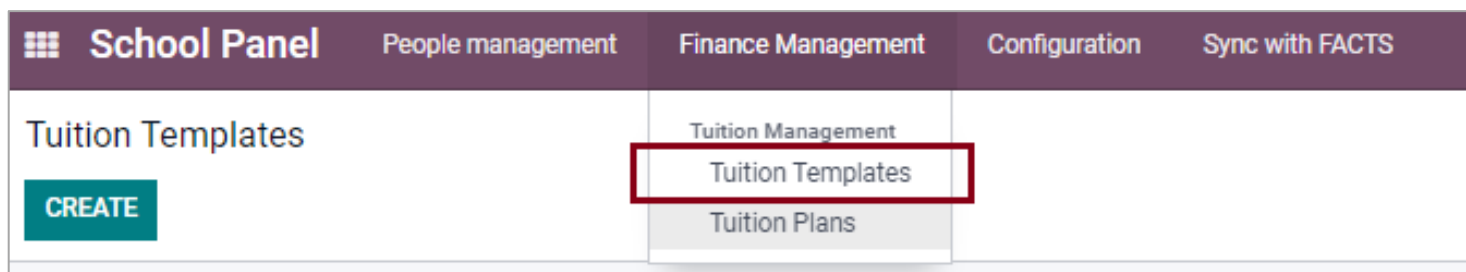
2. Scroll down to “Developer Tools”, then click on “activate the developer mode”.



3. After that go to “School Panel”.



4. Go to 'Finance Management'.



5. After selecting 'Finance Management', go to the 'Tuition Templates' option.

Grades 1-3

NEW TUITION PLAN

CONFIGURATION

Paid

100\$

Income

Due

6. Next, select the desired grade level and click on 'Configuration'.

Tuition Templates / Grades 1-3

EDIT

CREATE

Action

### Grades 1-3

Program

Pricelist Option

Fixed prices

Default journal

Customer Invoices

Payment terms

Immediate Payment

Lines

Installments

Discounts

Recurring options

Product	Description	Installments	Account	Grade levels	Domain	Quantity	Default unit pri...	Discount	Subtotal	
New Tuition	New Tuition	<div>September</div> <div>October</div> <div>November</div> <div>December</div> <div>January</div> <div>February</div> <div>March</div> <div>April</div> <div>May</div> <div>June</div>	700000 Sales of goods in...		Match records with ANY of 1	10,00	480,00 €	0,00	4.800,00 €	

Enrollment History > Next

19 RECORD(S) →

Add a line

7. Click on “Edit”.

Discount	Subtotal	
0,00	<input checked="" type="checkbox"/> Product <input checked="" type="checkbox"/> Installments <input checked="" type="checkbox"/> Account <input checked="" type="checkbox"/> Grade levels <input checked="" type="checkbox"/> Domain <input checked="" type="checkbox"/> Journal <input checked="" type="checkbox"/> Taxes <input checked="" type="checkbox"/> Discount <input checked="" type="checkbox"/> Subtotal	

8. On the right-hand side, click on the three dots and ensure that the domain and grade levels are selected.

Lines											
Product	Description	Installments	Account	Grade levels	Domain	Quantity	Default unit ...	Journal	Tax...	Discount	Subtotal
New Tuition	New Tuition	September October November December January February March April May June	700000 Sales ...		Match records w Enrollment Hist → 19 RECORD(S)	10,00	480,00 €	Customer Invo...		0,00	<input checked="" type="checkbox"/> Product <input checked="" type="checkbox"/> Installments <input checked="" type="checkbox"/> Account <input checked="" type="checkbox"/> Grade levels <input checked="" type="checkbox"/> Domain <input checked="" type="checkbox"/> Journal <input checked="" type="checkbox"/> Taxes <input checked="" type="checkbox"/> Discount <input checked="" type="checkbox"/> Subtotal

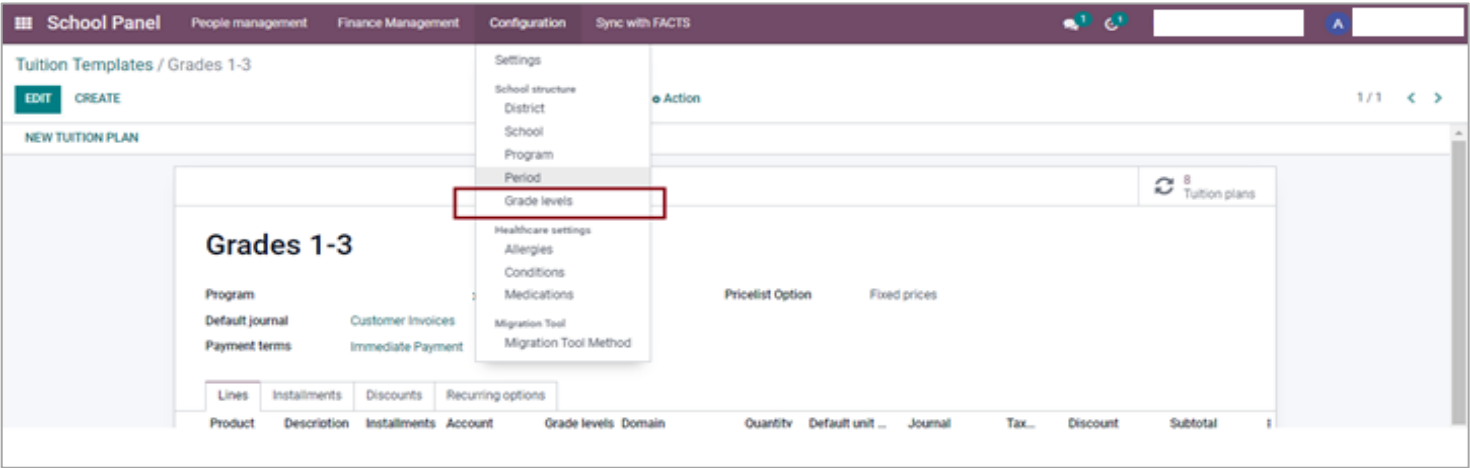
Add a line

9. Ensure that the selected grade level does not have any existing entries yet.

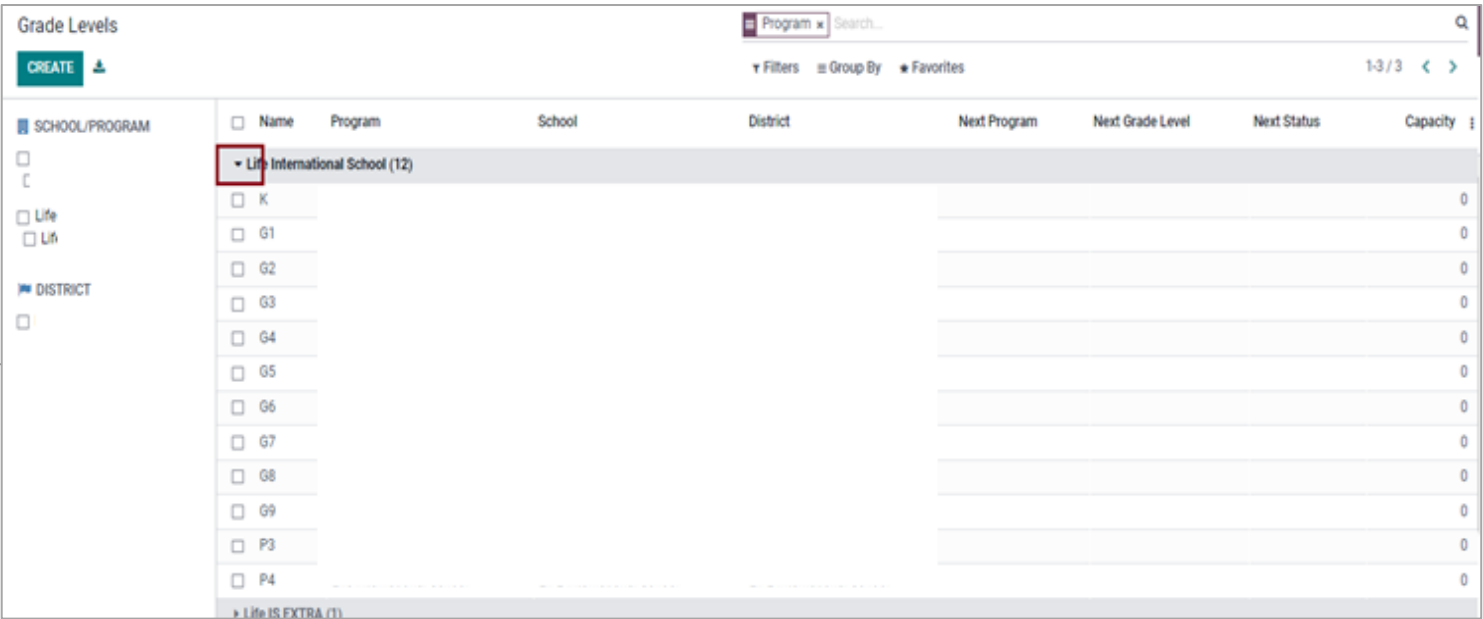
Lines											
Product	Description	Installments	Account	Grade levels	Domain	Quantity	Default unit ...	Journal	Tax...	Discount	Subtotal
New T	New Tuition	Septe... ✕ October ✕ Novem... ✕ Decem... ✕ January ✕ Februa... ✕ March ✕ April ✕ May ✕ June ✕	700000 Sa ✕		Match records w Enrollment Hist → 19 RECORD(S) EDIT DOMAIN	10,00	480,00 €	Customer I ✕		0,00	4.800,00 €

Add a line

10. Go to "Domain", then click "Edit Domain".



11. On the duplicate tab, go to “Configuration” then click “Grade Levels”.



12. To view the information, click on the 'unfold' option

Grade Levels / G1

EDIT CREATE Action 2 / 12 < >

Name	G1	Program
Capacity	0	School
Next Program		District
Next Grade Level		
Next Status		
Facts ID	0	

Sync from WS

13. Go to G1 by clicking it.

School Panel People management Tuition Management Configuration Data with FACTS Life Informational Platform

Tuition Templates / Grades 1-3

SAVE DISCARD

Domain

Match all records

+ ADD FILTER

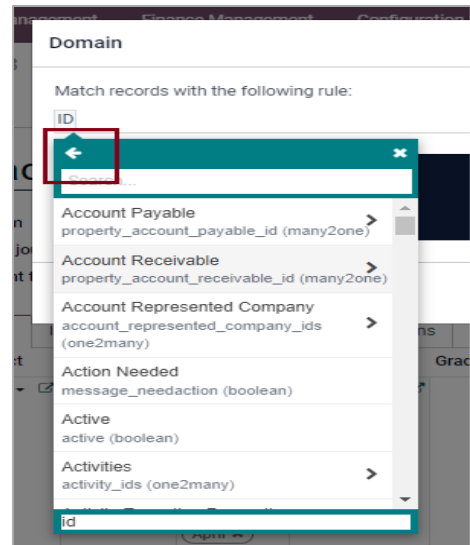
Code editor

SAVE DISCARD

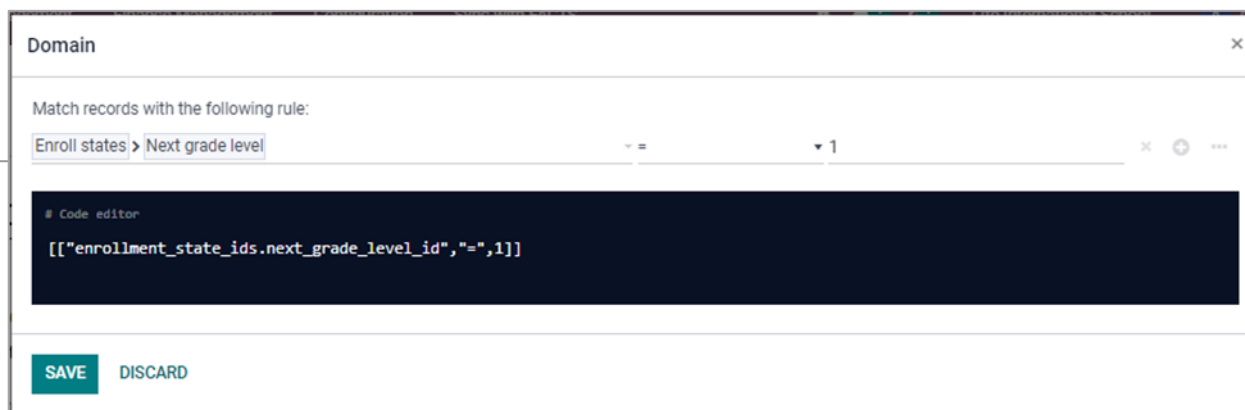
Lines Installments Discounts Recurring options

Product	Description	Installments	Account	Grade levels	Domain	Quantity	Default unit	Journal	Tax	Discount	Subtotal
---------	-------------	--------------	---------	--------------	--------	----------	--------------	---------	-----	----------	----------

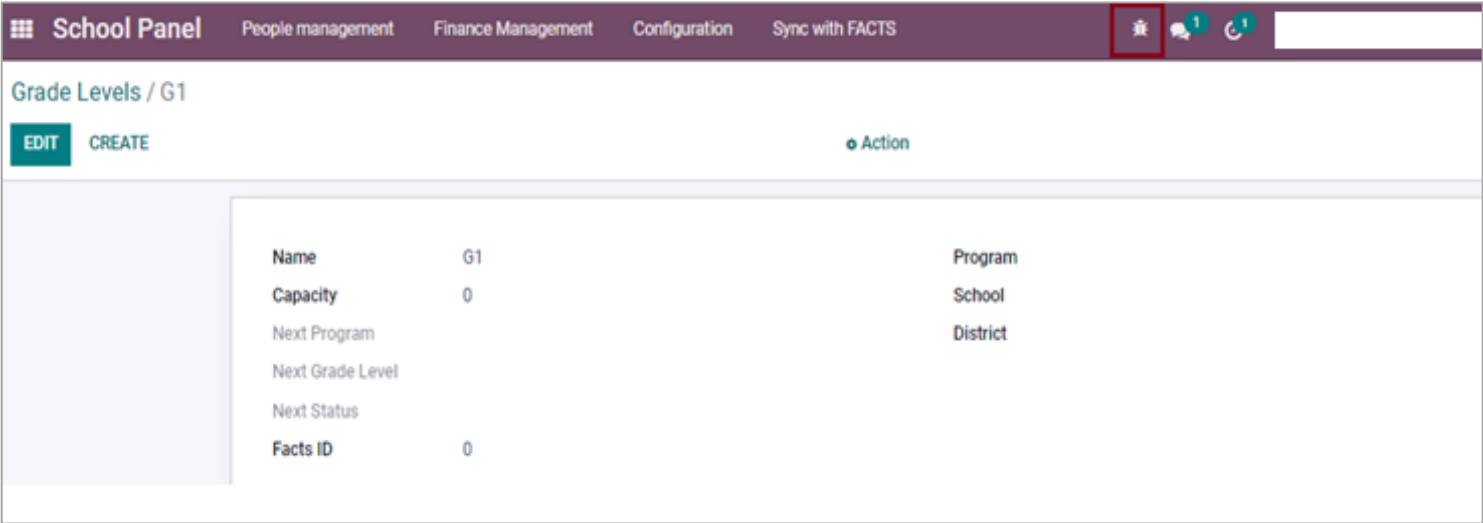
14. To begin the configuration process, return to the first tab and click on 'Add Filter'.



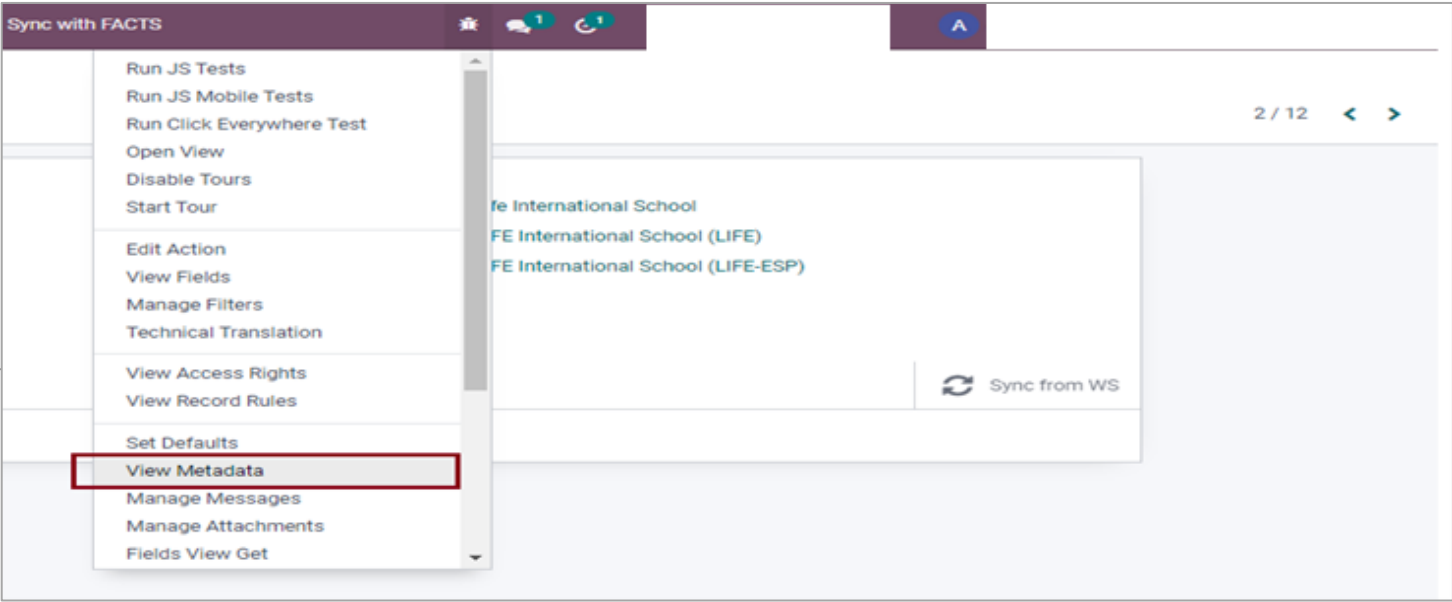
15. Click “ID”, then go to previous button arrow.



16. Search for “Enroll States” and “Next Grade Level”.



17. The 'Grade Level ID' is required in the code, which can be obtained from the second tab by clicking on the bug icon.



18. Go to “View Metadata”.

View Metadata

ID:

2

XML ID:

/

No Update:

false

Creation User:

Creation Date:

18/01/23 10:38:53

Latest Modification by:

Latest Modification Date:

18/01/23 10:38:53

OK

19. Then copy the ID (Grade 1) located in the “View Metadata”.

Domain

Match records with the following rule:

Enroll states

>

Next grade level

=

▼ 2

×

+

...

# Code editor

[[ "enrollment\_state\_ids.next\_grade\_level\_id", "=", 2 ]]

SAVE

DISCARD

20. Put the ID on the “Domain”.

Domain

Match records with ALL of the following rules:

Enroll states > Next grade level

=

2

x

+

...

Enroll states > Next grade level

=

1

x

+

...

# Code editor

[ "&",[ "enrollment\_state\_ids.next\_grade\_level\_id","=",2],[ "enrollment\_state\_ids.next\_grade\_level\_id","=",1]]

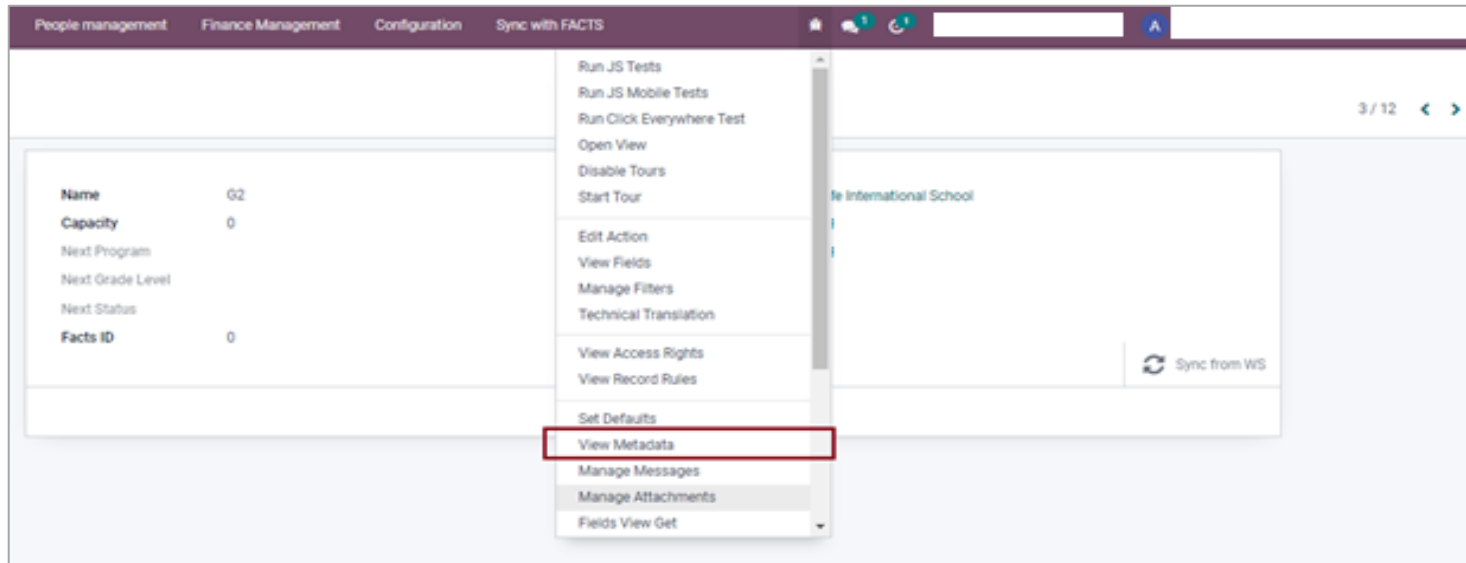
SAVE

DISCARD

21. Same process for Grade 2, go to the next line. Then go to previous button arrow and search for “Enroll States” and “Next Grade Level”.

<input type="checkbox"/>	Name	Program	School	District	Next Program	Next Grade Level	Next Status	Capacity
▼ Life International School (12)								
<input type="checkbox"/>	K							0
<input type="checkbox"/>	G1							0
<input type="checkbox"/>	G2							0
<input type="checkbox"/>	G3							0
<input type="checkbox"/>	G4							0
<input type="checkbox"/>	G5							0
<input type="checkbox"/>	G6							0
<input type="checkbox"/>	G7							0
<input type="checkbox"/>	G8							0
<input type="checkbox"/>	G9							0
<input type="checkbox"/>	P3							0
<input type="checkbox"/>	P4							0
► Life IS EXTRA (1)								
► Undefined (1)								

22. Go to 2nd tab, and select to Grade 2.



23. Go to bug icon then click “View Metadata”.



24. Then get the ID from Grade 2.

Domain

Match records with ALL of the following rules:

Enroll states > Next grade level

=

2

x + ...

Enroll states > Next grade level

=

3

x + ...

# Code editor

["&",[{"enrollment\_state\_ids.next\_grade\_level\_id","=",2}, {"enrollment\_state\_ids.next\_grade\_level\_id","=",3}]]

SAVE

DISCARD

25. Put the ID(Grade 2) on the “Domain”.

24. Then repeat steps for other “Grade Levels”. (Steps 14 to 20)

Domain

Match records with **ANY** of the following rules:

Enroll states > Next grade level

=

▼ 2

✕ + ...

Enroll states > Next grade level

=

▼ 3

✕ + ...

Enroll states > Next grade level

=

▼ 4

✕ + ...

# Code editor

```
[["|","|"],["enrollment_state_ids.next_grade_level_id","=",2],["enrollment_state_ids.next_grade_level_id","=",3],["enrollment_state_ids.next_grade_level_id","=",4]]
```

SAVE

DISCARD

25. Before saving, ensure that the 'Match Records' option is set to 'Any'.

Domain

Match records with **ANY** of the following rules:

Enroll states > Next grade level

=

▼ 2

✕ + ...

Enroll states > Next grade level

=

▼ 3

✕ + ...

Enroll states > Next grade level

=

▼ 4

✕ + ...

# Code editor

```
[["|","|"],["enrollment_state_ids.next_grade_level_id","=",2],["enrollment_state_ids.next_grade_level_id","=",3],["enrollment_state_ids.next_grade_level_id","=",4]]
```

SAVE

DISCARD

26. Once all the “Grade Levels” are set up. Click “Save”.

Lines

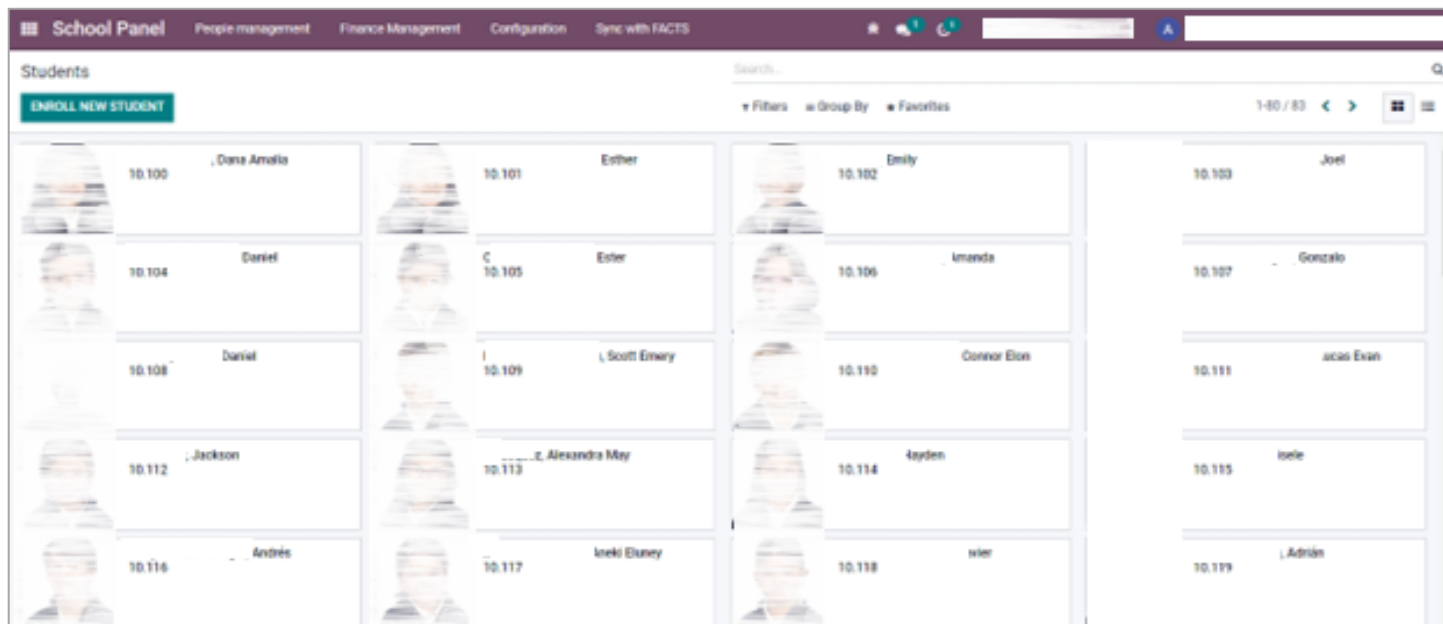
Installments

Discounts

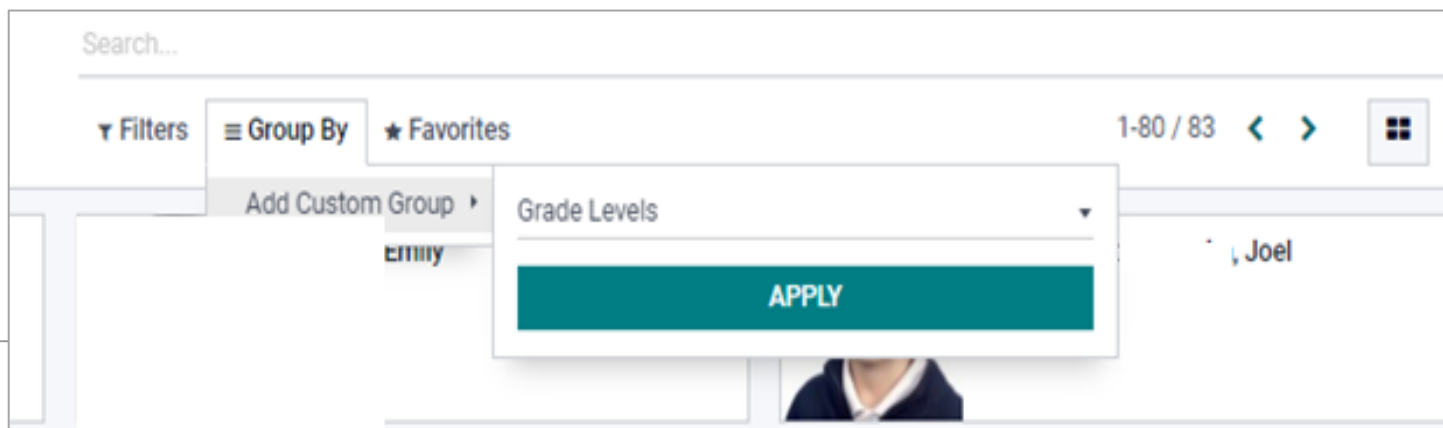
Recurring options

Product	Description	Installments	Account	Grade levels	Domain	Quantity	Default unit ...	Journal	Tax...	Discount	Subtotal	
⌵ New Tuition	New Tuition	<div>September</div> <div>October</div> <div>November</div> <div>December</div> <div>January</div> <div>February</div> <div>March</div> <div>April</div> <div>May</div> <div>June</div>	700000 Sales ...		Match records w	10,00	480,00 €	Customer Invo...		0,00	4.800,00 €	🗑
						<div>Enroll states &gt; ⌵</div> <div>➔</div> <div>17 RECORD(S)</div>						
Add a line												

27. We also need to make sure all the installments are configured.



28. After completing these steps, we are now ready to create tuition plans for the upcoming school year. Navigate to the 'School Panel'.



29. To group tuition plans by grade level, click on 'Group By', search for 'Grade Levels', and then click 'Apply'.

Tuition Templates / Grades 1-3

EDITCREATE

Action

NEW TUITION PLAN

Grades 1-3

ProgramPricelist OptionFixed prices

Default journalCustomer Invoices

Payment termsImmediate Payment

LinesInstallmentsDiscountsRecurring options

Product	Description	Installments	Account	Grade levels	Domain	Quantity	Default unit ...	Journal	Tax...	Discount	Subtotal
---------	-------------	--------------	---------	--------------	--------	----------	------------------	---------	--------	----------	----------

30. Assuming that “Tuition Templates” are completed. Go to the 1st tab, then click on “New Tuition Plan”.

Odoo

Post tuition plans

Students

Name	Facts ID	UDID
Add a line		

CancelCONFIRM

31. Click “Add a line”.

The screenshot shows the 'Add: Students' dialog box. At the top, there is a search bar and a 'Filter' button. Below this, there is a 'Group By' dropdown menu which is currently open, showing 'Grade Levels' as the selected option. An 'APPLY' button is visible next to the dropdown. The main area of the dialog is a table with columns for 'Name', 'Facts ID', and 'UDID'. The table contains 11 rows of data, with 'Name' values ranging from 10101 to 10111. At the bottom of the dialog, there are three buttons: 'SELECT', 'CREATE', and 'CANCEL'.

32. You can group the students based on your preferences (Grade Levels).

The screenshot shows the 'Add: Students' dialog box with the 'Grade Levels' dropdown menu expanded. The menu displays a list of grade levels and their corresponding Facts ID and UDID. The 'Name' checkbox is checked. The table below the dropdown shows the following data:

Name	Facts ID	UDID
G1 (9)	91.985	
10126		
10136		
10137		
10140		
10147		
10311		
10319		
10328		
10341		
G2 (3)	30.412	
G3 (8)	81.100	
G4 (13)	121.784	

At the bottom of the dialog, there are three buttons: 'SELECT', 'CREATE', and 'CANCEL'.

33. To create a tuition plan for each grade level, click on the grade level to expand its details and select the 'Name' checkbox

Add: Students

Grade Levels Search...

MAKE A CHARGE 9 selected Select all 83 Action Filters Group By Favorites 1-13 / 13

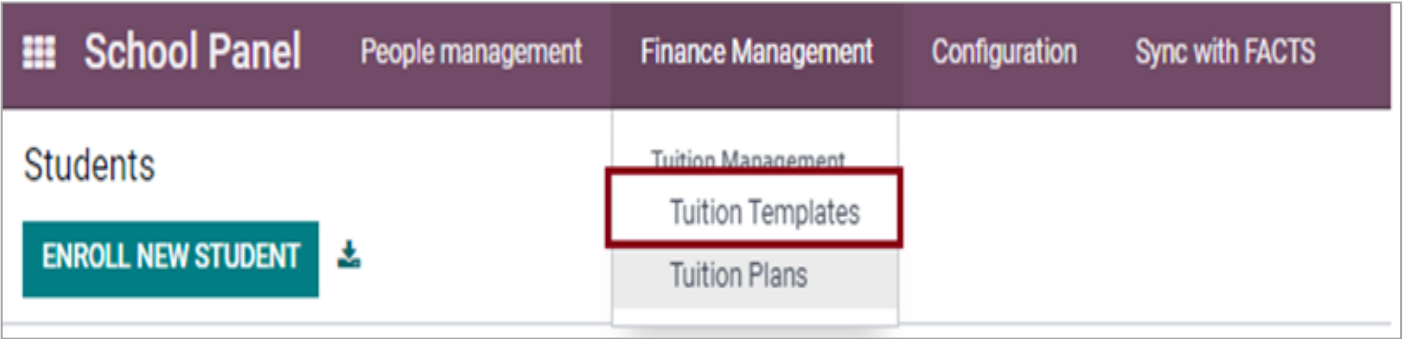
Name	Facts ID	UDID
G1 (9)	91.985	
<input checked="" type="checkbox"/>	10126	
<input checked="" type="checkbox"/>	10136	
<input checked="" type="checkbox"/>	10137	
<input checked="" type="checkbox"/>	10140	
<input checked="" type="checkbox"/>	10147	
<input checked="" type="checkbox"/>	10311	
<input checked="" type="checkbox"/>	10319	
<input checked="" type="checkbox"/>	10328	
<input checked="" type="checkbox"/>	10341	
G2 (3)	30.412	
G3 (8)	81.100	
G4 (13)	121.784	

SELECT CREATE CANCEL

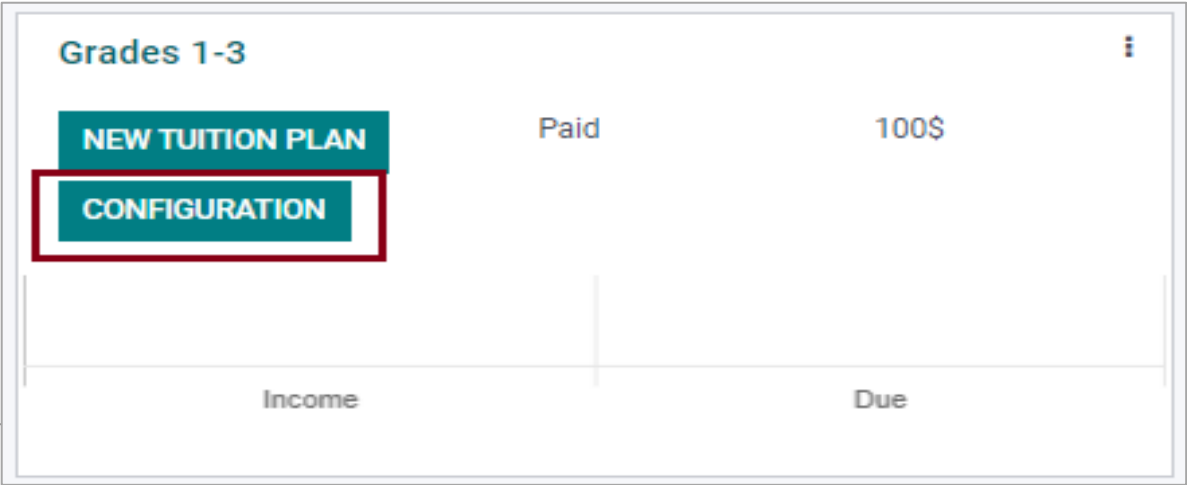
34. Click "Select". Then confirm.

Cancel CONFIRM

35. It will create 8 Tuition Plans for 8 students. You just need to double check each tuition plan to make sure.



36. Let's say we are already on the current year (After progression). Go to "Tuition Templates".



37. Go to configuration.

Name  
**Grades 1-3**

Program ▼ ✎ Pricelist Option ▼ Fixed prices

Default journal ▼ ✎ Customer Invoices

Payment terms ▼ ✎ Immediate Payment

Lines Installments Discounts Recurring options

Product	Description	Installments	Account	Grade levels	Domain	Quantity	Default unit ...	Journal	Tax...	Discount	Subtotal
New T <span>▼</span> <span>✎</span>	New Tuition	Septe... <span>✕</span> October <span>✕</span> Novem... <span>✕</span> Decem... <span>✕</span> January <span>✕</span> Februa... <span>✕</span> March <span>✕</span> April <span>✕</span> May <span>✕</span> June <span>✕</span>	700000 Sa <span>▼</span> <span>✎</span>		Match records w Enroll states > <span>▼</span> → ↺ 17 RECORD(S) <b>EDIT DOMAIN</b>	10,00	480,00 €	Customer I <span>▼</span> <span>✎</span>	-	0,00	4.800,00 € <span>🔍</span>

38. Edit the domain.

Domain ✕

Match records with **ANY** of the following rules:

Enroll states > Next grade level	=	▼ 2	<span>✕</span> <span>+</span> <span>...</span>
Enroll states > Next grade level	=	▼ 3	<span>✕</span> <span>+</span> <span>...</span>
Enroll states > Next grade level	=	▼ 4	<span>✕</span> <span>+</span> <span>...</span>

# Code editor

```
[",",",",["enrollment_state_ids.next_grade_level_id","=",2],["enrollment_state_ids.next_grade_level_id","=",3],["enrollment_state_ids.next_grade_level_id","=",4]]
```

**SAVE** DISCARD

39. Remove all the "Grade Levels" by clicking the "x" and save the changes.

Name

Grades 1-3

Program

Pricelist Option

Fixed prices

Default journal

Customer Invoices

Payment terms

Immediate Payment

Lines

Installments

Discounts

Recurring options

Product	Description	Installments	Account	Grade levels	Domain	Quantity	Default unit ...	Journal	Tax...	Discount	Subtotal
New T	New Tuition	<div>Septe...<div>✕</div></div> <div>October...<div>✕</div></div> <div>Novem...<div>✕</div></div> <div>Decem...<div>✕</div></div> <div>January...<div>✕</div></div> <div>Februa...<div>✕</div></div> <div>March...<div>✕</div></div> <div>April...<div>✕</div></div> <div>May...<div>✕</div></div> <div>June...<div>✕</div></div>	700000 Sa	<div>G1...<div>✕</div></div> <div>G2...<div>✕</div></div> <div>G3...<div>✕</div></div>	<div>Match all record:</div> <div>→ ↺</div> <div>83 RECORD(S)</div> <div>EDIT DOMAIN</div>	10,00	480,00 €	Customer 1	-	0,00	4.800,00 €

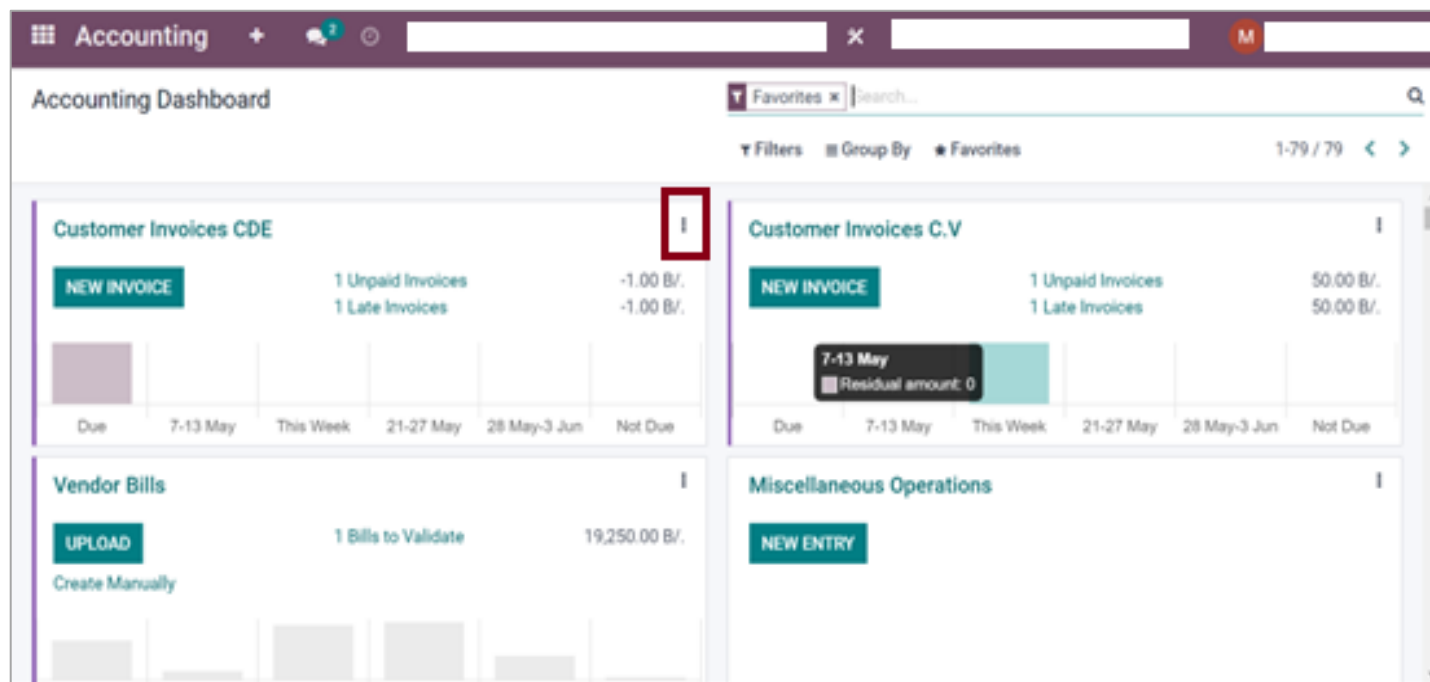
Add a line

40. On the Tuition Template, add the “Grade Levels” from Grade 1 to 3, and then click ‘Save’.

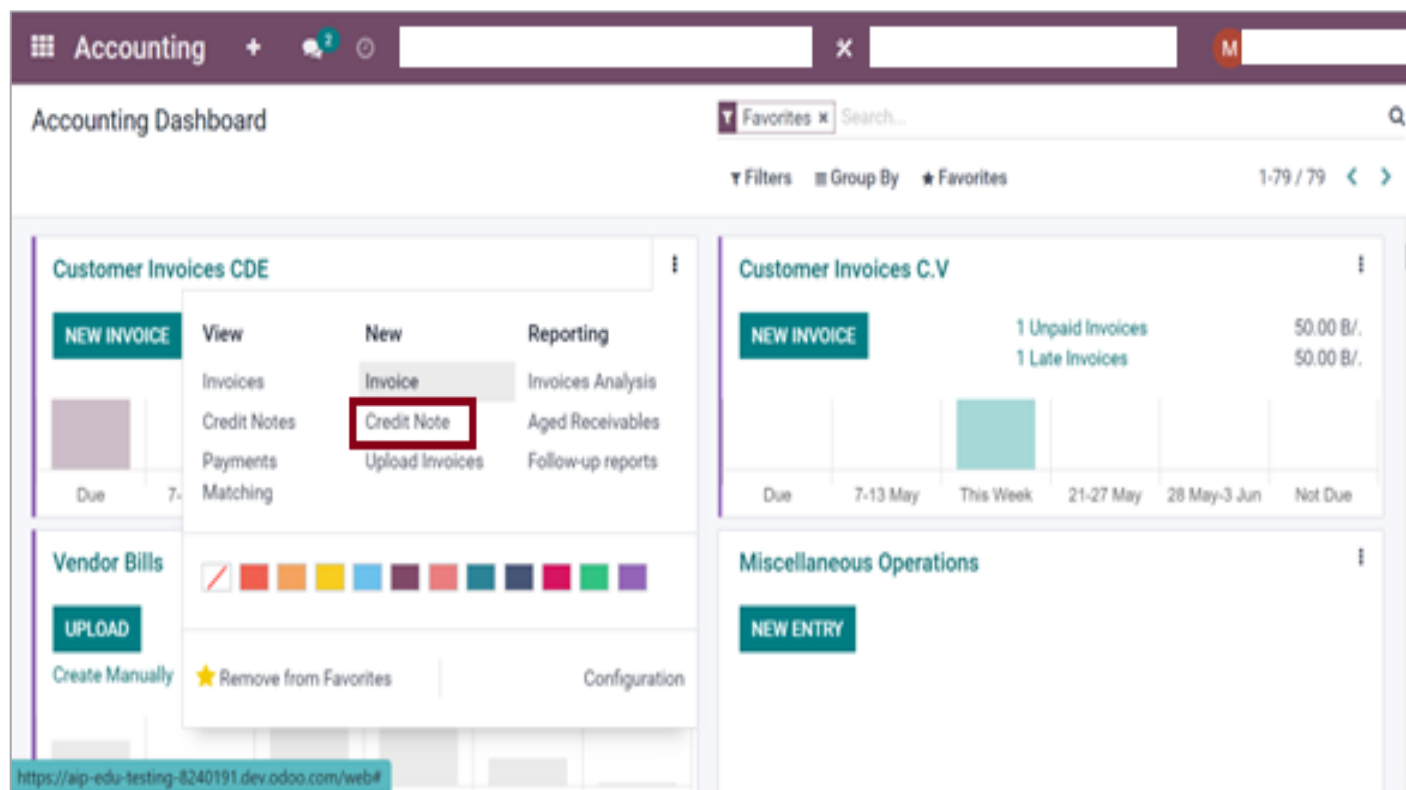
## 6 Advanced Features : How To Create A Credit Note



1. In the main menu, click on 'Accounting'.



2. This screen will be displayed on the dashboard. Tap on the three dots at the top right corner to access the credit note option.



3. By tapping on the three dots, the screen or menu for that journal will be displayed. Select 'New Credit Note' from the options.

Accounting Dashboard / New

SAVE DISCARD

CONFIRM PREVIEW GENERATE LATE FEE DRAFT POSTED

Customer Credit Note

**Draft**

Customer

Payment Reference

Students

Grade Level

Program

School

District

Invoice Date

Accounting Date 05/17/2023

Due Date  or

Journal Customer Invo  in PAB

Late Fee Rule

4. Here, you will fill out all the information to create the credit note.

Accounting Dashboard / New

SAVE DISCARD

Invoice Lines Journal Items Other Info Tuition plan Late fee rule items Late fees Electronic Invoicing

Product	Label	Student	Account	Quantity	UoM	Price	Taxes	Subtotal
Add a line	Add a section	Add a note						

Terms & Conditions: <https://aiptesting.odoo.com/terms>

Total: 0.00 B/.

Send message Log note Schedule activity

0 Follow 0

Accounting Dashboard / Draft Credit Note (\* 129668)

EDIT CREATE Print Action 1 / 1 < >

**CONFIRM** PREVIEW CANCEL GENERATE LATE FEE DRAFT POSTED

Customer Credit Note

## Draft

Customer - 8-707-567 Invoice Date 05/17/2023

Payment Reference CBWCV/2023/00578 Accounting Date 05/17/2023

Students Due Date 05/17/2023

Family Journal Customer Invoices CDE in PAB

Grade Level Late Fee Rule

Program

School

5. You fill out the data and confirm it.

Accounting Dashboard / Draft Credit Note (\* 129668)

EDIT CREATE Print Action 1 / 1 < >

INVOICE

Product	Label	Student	Account	Quantity	UoM	Price	Tax...	Subtotal	
Cuotas - CV	Cuotas - CV		40100-2 Ingreso por Cuot...	1.00	Units	225.00		225.00 B/.	

Add a line Add a section Add a note

Términos y condiciones: <https://aiptesting.odoo.com/terms>

Total: 225.00 B/.

Accounting

Accounting Dashboard / RINV1/2023/00002

EDIT

CREATE

Print

Action

1 / 1

<

>

SEND & PRINT

REGISTER PAYMENT

PAY WITH WALLET

PREVIEW

RESET TO DRAFT

GENERATE LATE FEE

DRAFT

POSTED

Customer Credit Note

RINV1/2023/00002

Customer

– 8-707-567

Invoice Date

05/17/2023

Payment Reference

CBWCV/2023/00578

Accounting Date

05/17/2023

Due Date

05/17/2023

Students

Journal

Customer Invoices CDE in PAB

Family

Late Fee Rule

Grade Level

Program

School

6. Upon confirming the order, a screen will appear displaying the credit note number, which is the internal sequential number in the system. It also provides the option to register the payment. It is necessary to register the payment.

Register Payment

Journal Amount 225.00 B/P: PAB

Recipient Bank Account Payment Date 05/17/2023

Memo CBWCV/2023/00578

CREATE PAYMENT CANCEL

Customer Invoice Date 05/17/2023

Payment Reference CBWCV/2023/00578 Accounting Date 05/17/2023

Students Due Date 05/17/2023

Family Journal Customer Invoices CDE in PAB

Grade Level Late Fee Rule

Program

School

7. To create the payment, the procedure is the same as that of the sales order.

Accounting + [2] [M]

Accounting Dashboard / Credit Notes / RINV1/2023/00002

EDIT CREATE Print Action 1 / 2 < >

Invoice Lines Journal Items Other Info Tuition plan Late fee rule items Late fees Electronic Invoicing

Product	Label	Student	Account	Quantity	UoM	Price	Taxes	Subtotal
Cuotas - CV	Cuotas - CV		100-2 Ingreso por Cuotas	1.00	Units	225.00		225.00 B/.

Términos y condiciones: <https://aiptesting.odoo.com/terms>

**Journal Entry Info**

Amount: 225.00 B/.

Memo: CCBWV/2023/05/0001  
(CBWCV/2023/00578)

Date: 05/17/2023

Journal: (Manual)

UNRECONCILE VIEW

Total: 225.00 B/.

Paid on 05/17/2023 225.00 B/.

Amount Due: 0.00 B/.

8.The payment is created, and the credit note will show a balance of zero (-0-) with the payment reference.

Accounting + [Search] [M]

Payments / CCBWV/2023/05/0002

EDIT CREATE Print Action 1 / 5 < >

RESET TO DRAFT MARK AS SENT DRAFT POSTED

**1 Credit Note** Journal Entry

**CCBWV/2023/05/0002**

Internal Transfer ☐ Journal Cobro Cuota Wallet CV

Payment Type ☒ Send ☐ Receive Customer Bank Account

Customer Villamil, Sophie

Wallet

Amount 225.00 B/. PAB

Date 05/17/2023

Memo CBWCV/2023/00099

9. Once the payment for the credit note is created, if you go to 'ACCOUNTING - Customer - Payments,' the payment will indicate that it corresponds to a credit note.

Accounting + [Search] [M]

Payments / CCBWV/2023/05/0002 / RINV1/2023/00003

EDIT SEND & PRINT PREVIEW RESET TO DRAFT GENERATE LATE FEE Print Action 1 / 1 < >

DRAFT POSTED

**Customer Credit Note**

**RINV1/2023/00003**

Customer 8-707-567 Invoice Date 05/17/2023

Payment Reference CBWCV/2023/00099 Accounting Date 05/17/2023

Students Due Date 05/17/2023

Family Journal Customer Invoices CDE in PAB

Grade Level Late Fee Rule

Program

School

**IN PAYMENT**

10. If you click on 'CREDIT NOTE', the credit note screen will be displayed.

Date	Journal Entry	Ac Cc P... Fa Student	Label	Due date	Debit	Credit	Balance	Match
05/17/2023	CCBWV/2023/05/0001 (CBWCV/2023/00578)	1. A. V... F.	Customer Re...	05/17/2023	225.00	0.00	225.00	
05/03/2023	COPCV/2023/05/0075 (CBWCV/2023/00578)	1. A. V... F.	Customer P...	05/03/2023	0.00	225.00	-225.00	
04/03/2023	COPCV/2023/04/0560 (CBWCV/2023/01056)	1. A. V... F.	Customer P...	04/03/2023	0.00	225.00	-225.00	
03/06/2023	BNK4/2023/03/0065 (CBWCV/2023/00099)	1. A. V... F.	Customer P...	03/06/2023	0.00	225.00	-225.00	
03/05/2023		1. A. V... F.	S11006	03/20/2023	20.00	0.00	20.00	
02/21/2023		1. A. V... F.	S09369	03/20/2023	150.00	0.00	150.00	

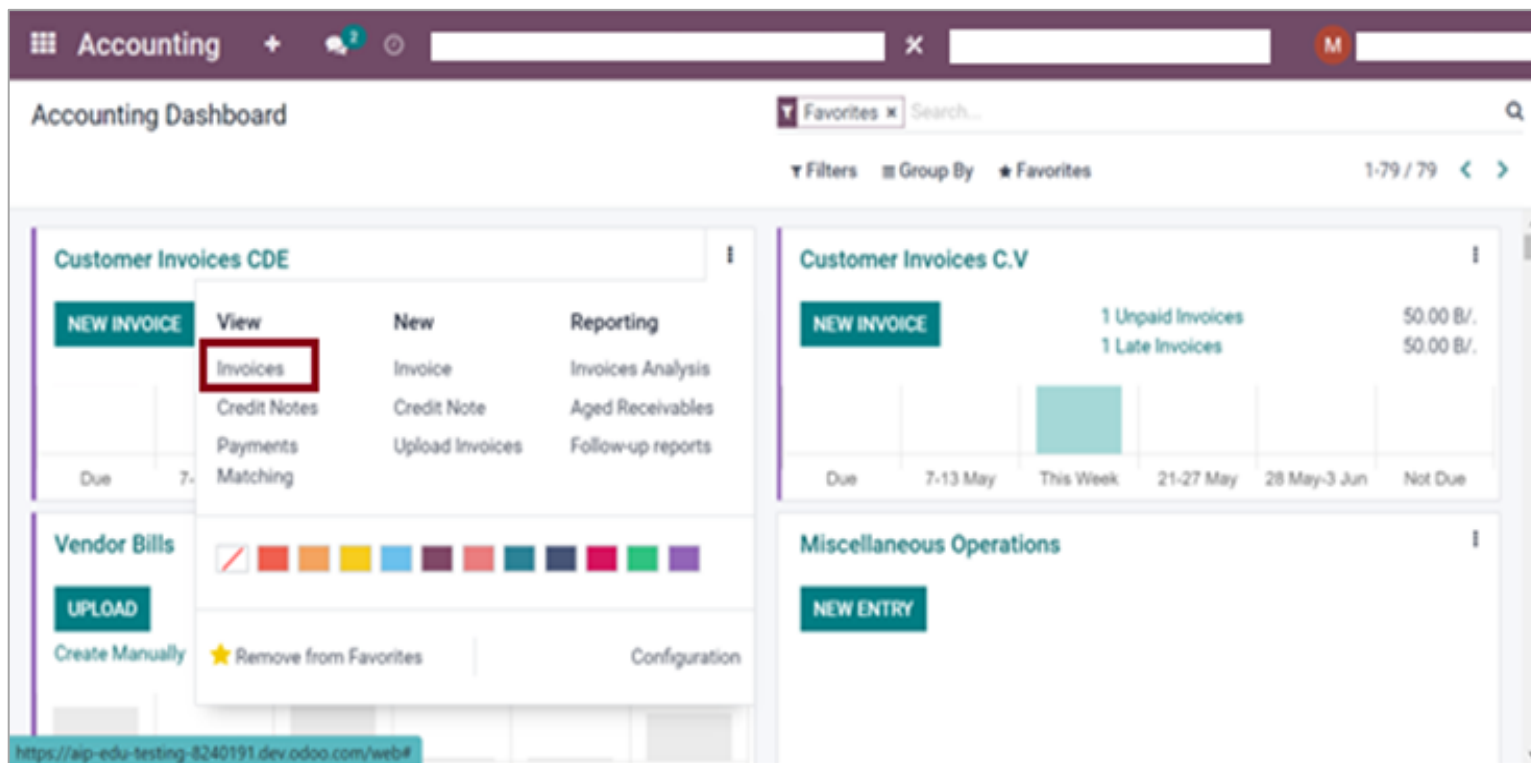
11. We check the student's account statement to verify that the credit note is reflected.

12. To validate how many credit notes we have created, go to 'Accounting' on the dashboard, click on the three dots, select 'View' and choose 'Credit Note'.

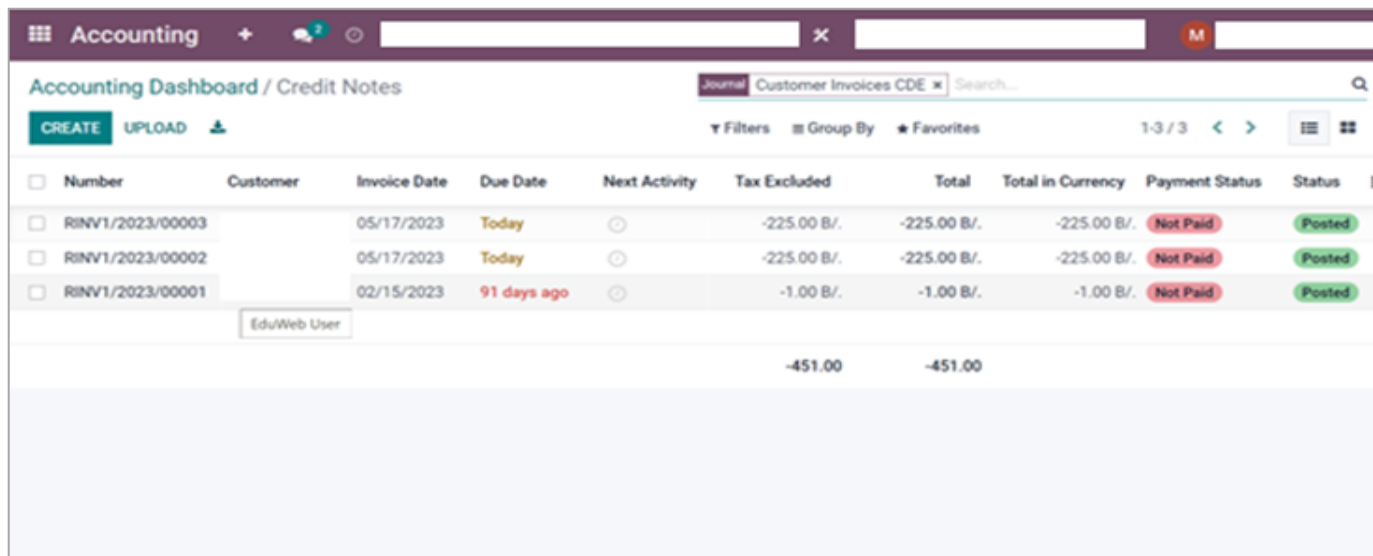
Accounting										
Credit Notes										
<div> <div>CREATE</div> <div>UPLOAD</div> <div></div> </div> <div> <div>Search...</div> <div> <div>Filters</div> <div>Group By</div> <div>Favorites</div> </div> <div>1-7 / 7</div> <div> <div></div> <div></div> </div> </div>										
<input type="checkbox"/>	Number	Customer	Invoice Date	Due Date	Next Activity	Tax Excluded	Total	Total in Currency	Payment Status	Status
<input type="checkbox"/>	RINV1/2023/00003		05/17/2023			-225.00 B/.	-225.00 B/.	-225.00 B/.	In Payment	Posted
<input type="checkbox"/>	RINV1/2023/00002		05/17/2023			-225.00 B/.	-225.00 B/.	-225.00 B/.	In Payment	Posted
<input type="checkbox"/>	RVBWCE/2023/00001		05/17/2023	Today		-700.00 B/.	-700.00 B/.	-700.00 B/.	Not Paid	Posted
<input type="checkbox"/>	RWAVCE/2023/00003		04/27/2023			-37.87 B/.	-37.87 B/.	-37.87 B/.	In Payment	Posted
<input type="checkbox"/>	RWAVCE/2023/00002		04/26/2023			-217.03 B/.	-217.03 B/.	-217.03 B/.	In Payment	Posted
<input type="checkbox"/>	RWAVCE/2023/00001		04/26/2023	21 days ago		-325.95 B/.	-325.95 B/.	-217.03 B/.	Not Paid	Posted
<input type="checkbox"/>	RINV1/2023/00001		02/15/2023	91 days ago		-1.00 B/.	-1.00 B/.	-1.00 B/.	Not Paid	Posted
						-1,731.85	-1,731.85			

13. It will list all the credit notes that have been created.

## 7 Advanced Features : How To Create A Credit Note For An Invoice

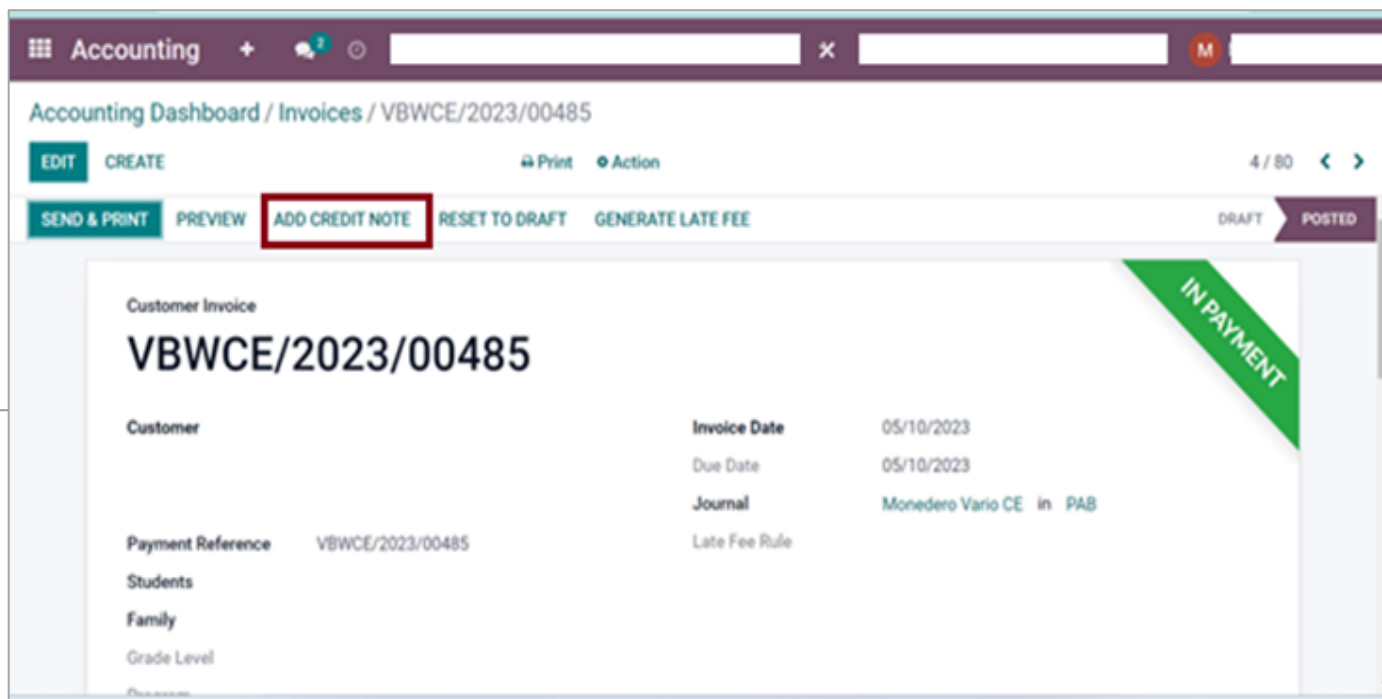


1. Let's go to 'Accounting' - "Dashboard" – 'View' – 'Invoice'. Alternatively, you can go to 'Accounting' – 'Customer' - "Invoices."



Number	Customer	Invoice Date	Due Date	Next Activity	Tax Excluded	Total	Total in Currency	Payment Status	Status
<input type="checkbox"/> RINV1/2023/00003		05/17/2023	Today	○	-225.00 B/.	-225.00 B/.	-225.00 B/.	Not Paid	Posted
<input type="checkbox"/> RINV1/2023/00002		05/17/2023	Today	○	-225.00 B/.	-225.00 B/.	-225.00 B/.	Not Paid	Posted
<input type="checkbox"/> RINV1/2023/00001		02/15/2023	91 days ago	○	-1.00 B/.	-1.00 B/.	-1.00 B/.	Not Paid	Posted
					-451.00	-451.00			

2. The following screen will be displayed, showing the details of the created invoices. If you know the invoice number that you want to credit, enter the number, and click on it to access the invoice.



Accounting Dashboard / Invoices / VBWCE/2023/00485

**ADD CREDIT NOTE**

Customer Invoice  
**VBWCE/2023/00485**

Customer: [blank] Invoice Date: 05/10/2023  
Due Date: 05/10/2023  
Journal: Monedero Vario CE in PAB  
Late Fee Rule: [blank]

Payment Reference: VBWCE/2023/00485

Students: [blank]  
Family: [blank]  
Grade Level: [blank]

**IN PAYMENT**

3. Upon accessing the invoice, choose the option 'Add Credit Note'.

The screenshot shows a 'Credit Note' modal window. It contains the following fields and options:

- Reason:** Estudiante retirado
- Reversal Date:** ☒ Specific, ☐ Journal Entry Date
- Use Specific Journal:** Monedero Vario CE
- Refund Date:** 05/17/2023
- Buttons:** REVERSE, CANCEL

Below the modal, the background form shows:

- Due Date:** 05/10/2023
- Journal:** Monedero Vario CE in PAB
- Payment Reference:** VBVCE/2023/00485
- Students:** [Redacted]
- Family:** [Redacted]
- Grade Level:** [Redacted]

4. By double-clicking on 'Add Credit Note', a screen will be displayed where you should enter the reason for the credit note. Fill in the required information and click on 'Reverse' to proceed.

The screenshot shows the 'Draft Credit Note' screen. The breadcrumb trail is: Accounting Dashboard / Invoices / VBVCE/2023/00485 / Draft Credit Note RVBWCE/2023/00001 (Reversal of: VB...). The 'CONFIRM' button is highlighted with a red box. The screen displays the following information:

- Customer Credit Note:** RVBWCE/2023/00001
- Customer:** Costa Del Este, Ocean II 55, Panamá, Panamá
- Invoice Date:** 05/17/2023
- Due Date:** 05/17/2023
- Journal:** Monedero Vario CE in PAB
- Payment Reference:** [Redacted]
- Students:** [Redacted]
- Family:** [Redacted]
- Grade Level:** [Redacted]

5. The reversal credit note is created.

Accounting Dashboard / Invoices / VBWCE/2023/00485  
/ RVBWCE/2023/00001 (Reversal of: VBWCE/2023/00485...)

EDIT CREATE Print Action 1 / 1 < >

SEND & PRINT **REGISTER PAYMENT** PAY WITH WALLET PREVIEW RESET TO DRAFT GENERATE LATE FEE DRAFT POSTED

Customer Credit Note  
**RVBWCE/2023/00001**

Customer: Costa Del Este, Ocean II 55  
Panamá  
Panamá

Invoice Date: 05/17/2023  
Due Date: 05/17/2023  
Journal: Monedero Vario CE in PAB  
Late Fee Rule

Payment Reference  
Students  
Family  
Gracia Laveall

6. Click on 'Confirm' and you will be given the option to register the payment. Proceed with registering the payment.

Register Payment

Journal: Cobros Varios Wallet CE Amount: 700.00 B/. PAB

Recipient Bank: Payment Date: 05/17/2023

Account: Memo: Reversal of: VBWCE/2023/00485, Estudiante reti

**CREATE PAYMENT** CANCEL

Customer: Mirones, Rolando  
Costa Del Este, Ocean II 55  
Panamá  
Panamá

Invoice Date: 05/17/2023  
Due Date: 05/17/2023  
Journal: Monedero Vario CE in PAB  
Late Fee Rule

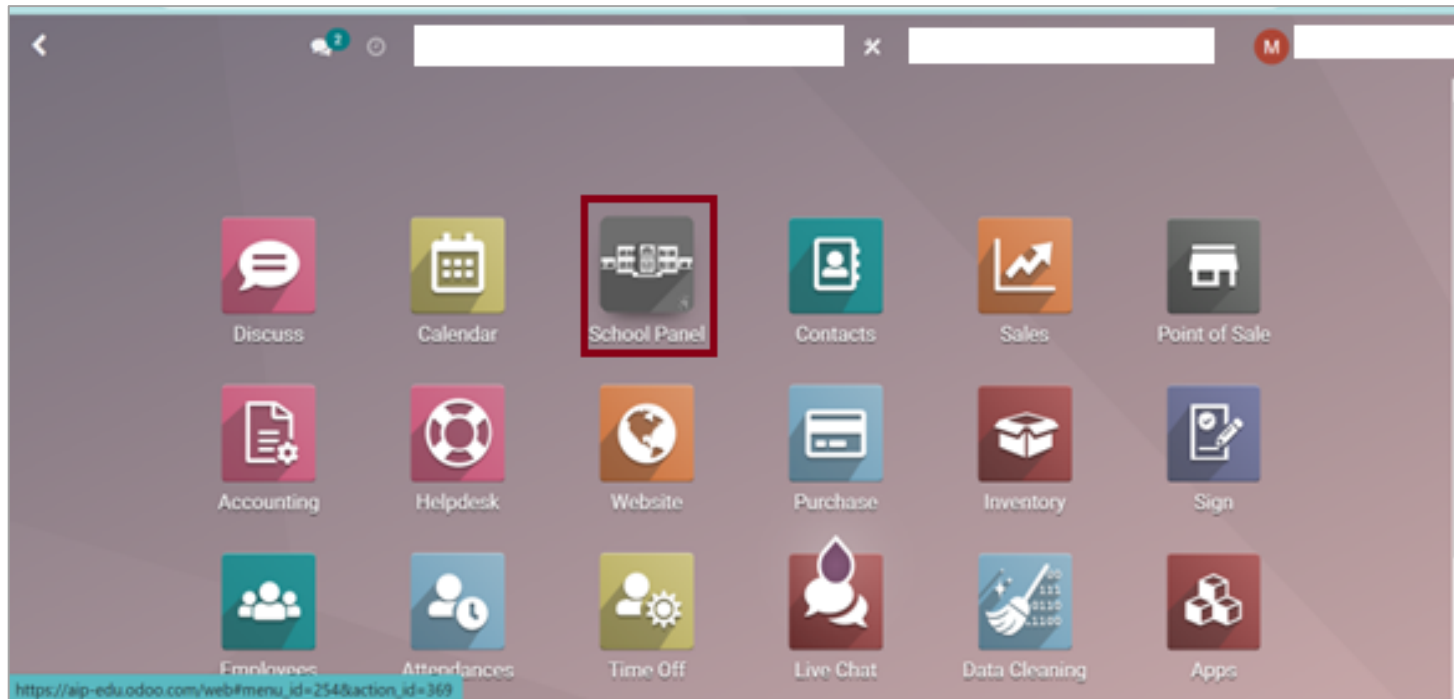
Payment Reference  
Students: Mirones Koumanis, Evangelos Geor...  
Family: Family of Mirones Koumanis  
Gracia Laveall

8. The invoice for the credit note changes its status to 'Paid'. To validate the payment in the 'Customer Payments' section, follow the same procedure described in steps 9 to 12 of 'Steps to issue a credit note for an invoice'.

Accounting										
Receivable Ledger										
<input type="checkbox"/> Posted <input checked="" type="checkbox"/> Family <input type="checkbox"/> Student contains "mirones" Search...										
<input type="button" value="CREATE"/> <input type="button" value="Filters"/> <input type="button" value="Group By"/> <input type="button" value="Favorites"/> <span>1-2 / 2</span>										
<input type="checkbox"/>	Date	Journal Entry	Account	Cc Pt Fa Student	La Dt	Debit	Credit	Balance	Match	
						15,236.99	12,886.99	2,350.00		
<input type="checkbox"/>	05/17/2023	CVBWC/2023/05/0001 (Reversal of: VBWCE/2023/00485, E...	11023-1 Cue...		C. O.	700.00	0.00	700.00		
<input type="checkbox"/>	05/10/2023	COPCE/2023/05/0218 (VBWCE/2023/00485)	11023-1 Cue...		C. O.	0.00	700.00	-700.00		
<input type="checkbox"/>	05/10/2023	COPCE/2023/05/0217 (VBWCE/2023/00484)	11023-1 Cue...		C. O.	0.00	650.00	-650.00		
<input type="checkbox"/>	05/01/2023	COPCE/2023/05/0217 (VBWCE/2023/00484)	11023-1 Cue...		S. O.	650.00	0.00	650.00		
<input type="checkbox"/>	05/01/2023		11023-1 Cue...		S. O.	700.00	0.00	700.00		
<input type="checkbox"/>	04/17/2023		11023-1 Cue...		S. O.	615.00	0.00	615.00		
<input type="checkbox"/>	04/10/2023	COPCE/2023/04/0203 (CBWCE/2023/01146)	11023-1 Cue...		C. O.	0.00	650.00	-650.00		
<input type="checkbox"/>	04/10/2023	COPCE/2023/04/0202 (CBWCE/2023/01145)	11023-1 Cue...		C. O.	0.00	650.00	-650.00		
<input type="checkbox"/>	04/01/2023		11023-1 Cue...		S. O.	700.00	0.00	700.00		

9. To validate if the credit note is reflected in the student's account statement, go to 'Accounting' – 'Receivable Ledger' and filter by the student's name.

## 8 Advanced Features: How to Register Payroll Deductions



1. In the main menu, select the 'School Panel' module.



2. In the 'Students' section, enter the name of the student and click on the box with their name to access the student's profile and proceed with the payment.

The screenshot shows the 'School Panel' interface for a student named Gabriel. The 'Wallet' tab is selected, and the 'LOAD WALLET' button is highlighted with a red box. The interface includes a header with 'School Panel', a search bar, and a user profile icon. Below the header, there are tabs for 'Families', 'Relationships', 'Healthcare', 'Academics', 'Enrollment history', 'Other', 'Demographics', 'Finance', and 'Seduca General Information'. The 'Wallet' tab is currently active, showing a table with columns for 'Wallet Category', 'Currency', 'Amount', 'Frozen Amount', and 'Available Amount'. The table contains one row with the value '0.00 B/' for each column. A red box highlights the 'LOAD WALLET' button, and another red box highlights the 'Wallet' tab.

First Name  
Middle Name Gabriel  
Last Name  
Student Number  
ID

Address partner link  
Address

Families Relationships Healthcare Academics Enrollment history Other Demographics Finance Seduca General Information

Parent Contacts **Wallet** Signed Documents

**LOAD WALLET**

Wallet Category	Currency	Amount	Frozen Amount	Available Amount
	B&R	0.00 B/	0.00 B/	0.00 B/

[https://aip-edu.odoo.com/web#notebook\\_page\\_5244](https://aip-edu.odoo.com/web#notebook_page_5244)

3. When you enter the student's data, select the option 'Wallet' and then choose 'Load Wallet'.

The screenshot shows the 'School Panel' interface for a student named Gabriel. The top navigation bar includes 'School Panel', a search bar, and a user profile icon. Below the navigation bar, the 'Students / Gabriel' section is visible. A toolbar contains buttons for 'EDIT', 'ENROLL NEW STUDENT', 'MAKE CHARGE', and 'Action'. The main content area displays a form for student information, including fields for First Name, Middle Name (Gabriel), Last Name, Student Number, and ID. There are also fields for 'Address partner link' and 'Address'. Below the form, a series of tabs are visible: Families, Relationships, Healthcare, Academics, Enrollment history, Other, Demographics, Finance, Seduca General Information, Parent Contacts, Wallet, and Signed Documents. The 'Wallet' tab is highlighted with a red box. Below the tabs, a 'LOAD WALLET' button is also highlighted with a red box. At the bottom, a table displays wallet information with columns for Wallet Category, Currency, Amount, Frozen Amount, and Available Amount. The table shows one entry with a currency of P.R. and amounts of 0.00 B/.

Wallet Category	Currency	Amount	Frozen Amount	Available Amount
	P.R.	0.00 B/	0.00 B/	0.00 B/

4. When you click on 'Load Wallet' a screen will be displayed to load the payment. Complete the following information:

Wallet: Enter the product you want to pay for.

Family: Enter the name of the family associated with the payment.

Journal: Specify the journal where the payments will be deposited.

Amount: Enter the total deduction or payment amount to be registered.

School Panel

Students / Carvalho Aguirre, Lucas Gabriel / DPCV/2023/05/0012

EDIT

Print Action

1 / 1

1 Invoice

Journal Entry

DPCV/2023/05/0012

Internal Transfer

Payment Type

Customer

Wallet

Amount

Date

Memo

Send Receive

Wendy

MATRÍCULA CV

150.00 B/. PAB

05/18/2023

MBWCV/2023/00220

Journal

Company Bank Account

Deducción de Planilla CV

5.Once you click on 'Apply', the payment screen will be displayed. If the discount date is today, 18/05/2023, the process is complete at this point, and the payment is processed for the student.

Accounting

Payments

Payment aguirre

CREATE

Filters Group By Favorites

1-2 / 2

Date	Number	Student	Journal	Payment Method	Customer	Amount	Status
05/18/2023	DPCV/2023/05/0012		Gabriel	Deducción de Planilla CV	Manual	Wendy	150.00 B/. Posted
01/02/2023	DPCV/2023/01/0010			Deducción de Planilla CV	Manual	Wendy	150.00 B/. Posted
						300.00	

6. To confirm that the payment has been applied, go to 'Accounting' – 'Customer' – 'Payments'. If you see the illustration, the payment should be processed and reflected in the payroll deduction journal.

The screenshot shows the Accounting module in a software application. The top navigation bar includes 'Accounting', a search bar, and a user profile icon. The main header displays 'Payments / DPCV/2023/05/0012'. Below this, there are buttons for 'EDIT', 'CREATE', 'Print', and 'Action'. A status bar at the top of the record shows 'RESET TO DRAFT' (highlighted with a red box), 'MARK AS SENT', 'DRAFT', and 'POSTED'. The record details are as follows:

DPCV/2023/05/0012	
Internal Transfer	<input type="checkbox"/>
Payment Type	<input type="radio"/> Send <input checked="" type="radio"/> Receive
Customer	Nendy
Wallet	MATRÍCULA CV
Amount	150.00 B/. PAB
Date	05/18/2023
Memo	MBWCV/2023/00220

On the right side of the record, there are tabs for '1 Invoice' and 'Journal Entry'. Below these, the 'Journal' section shows 'Deducción de Planilla CV' and 'Company Bank Account'.

7. When the payment is processed today, May 18th, but it needs to be recorded with a date of January 2nd, you will need to delete the payment, go to the invoice, change the date, and register the payment again.

First, you need to change the payment to a draft status. Go to the main menu and select 'Accounting' – 'Customer' – 'Payments'. Look for the customer and find the payment. Click on it to access the payment details, and then click on 'Reset to Draft' to change the payment status to draft.

The screenshot shows the Odoo Accounting interface for a Draft Payment entry. The breadcrumb trail is: Payments / DPCV/2023/05/0012 / Draft Entry (\* 131433) / Draft Payment. The interface includes buttons for EDIT, CONFIRM, and CANCEL. A red box highlights the CANCEL button. Another red box highlights the 'Delete' option in the 'Action' menu, which also lists 'Send receipt by email', 'Create Invoice', and 'Update Payment Lines'. The main form area is titled 'Draft' and contains the following fields:

Internal Transfer	<input type="checkbox"/>	Journal	Deducción de Planilla CV
Payment Type	<input type="radio"/> Send <input checked="" type="radio"/> Receive	Company Bank	
Customer	. Wendy	Account	
Wallet	MATRÍCULA CV		
Amount	150.00 B/. PAB		

The URL bar shows: https://aip-edu.odoo.com/web# and the date 05/18/2023.

8. Once the payment is in draft status, click on 'Cancel'. Then, go to 'Actions' and click on 'Delete' to remove the payment. Since it doesn't allow changing the date, deleting the payment is necessary.

The screenshot shows the 'Accounting' module in a software application. The main header displays 'Invoices / Draft Invoice MBWCV/2023/00219'. Below this, there is a toolbar with buttons: 'EDIT', 'CREATE', 'Print', and 'Action'. A secondary toolbar contains 'CONFIRM' (highlighted with a red box), 'PREVIEW', 'CANCEL', 'GENERATE LATE FEE', and 'APPLY LATE FEE'. On the right side of the toolbar, there are status indicators '2 / 2', navigation arrows, and a 'DRAFT' button. The main content area is titled 'Customer Invoice' and displays the invoice number 'MBWCV/2023/00219'. Below the number, there are fields for 'Customer' (Wendy, - 8807667), 'Payment Reference' (MBWCV/2023/00219), 'Students' (Gabriela), 'Family', 'Grade Level', 'Program', and 'School'. To the right of these fields, there are 'Invoice Date' (01/02/2023), 'Due Date' (01/02/2023), 'Journal' (Monedero Matricula CV in PAB), and 'Late Fee Rule'.

9. Let's go to the invoice section by selecting 'Accounting' – 'Customer' - 'Invoice'. When canceling the payment, the invoice is also canceled. Enter the invoice and change its status to draft by clicking on 'Reset to Draft'. Then, edit the invoice to change the date to January 2nd. Confirm the changes to enable the option for payment.

The screenshot shows the Accounting software interface. At the top, there's a header bar with 'Accounting' and a search bar. Below the header, the page title is 'Invoices / MBWCV/2023/00220'. There are buttons for 'EDIT', 'CREATE', 'SEND & PRINT', 'REGISTER PAYMENT' (highlighted with a red box), 'PAY WITH WALLET', 'PREVIEW', 'ADD CREDIT NOTE', 'RESET TO DRAFT', and 'GENERATE LATE FEE'. The 'REGISTER PAYMENT' button is highlighted with a red box. Below the buttons, there's a section for 'Customer Invoice' with the title 'MBWCV/2023/00220'. The customer details are: Customer: Wendy, Invoice Date: 01/02/2023, Due Date: 01/02/2023, Payment Reference: MBWCV/2023/00220, Journal: Monedero Matricula CV in PAB, Students: , Family: , Grade Level: , Program: , School: .

10. After making the date change, click on the 'Register Payment' option, and the procedure is the same as a manual payment. Please refer to step 4 for more details.

Accounting								
Receivable Ledger								
<div> <div>Posted</div> <div>Family</div> <div>Student contains 'aguire'</div> <div>Search...</div> </div> <div> <div>Filters</div> <div>Group By</div> <div>Favorites</div> <div>1-2 / 2</div> </div>								
<input type="checkbox"/> Date	Journal En...	A. Cc Partner	Family	Student	Label	Due date	Debit	Credit
▶ Family of (13)							4,305.00	2,820.00
▼ Family of (8)							640.00	320.00
<input type="checkbox"/> 01/02/2023	DPCV/2023/...	1..		Cc	Customer Payment 150.00 ...	01/02/2023	0.00	150.00
<input type="checkbox"/> 01/02/2023	DPCV/2023/...	1..	Wen...	Family of Ca...	Jabrie... Customer Payment 150.00 ...	01/02/2023	0.00	150.00
<input type="checkbox"/> 12/31/2022	1..		Wen...	Family of Ca...	as Ga... S10421 Customer Payment 150.00 B/- - Aguire, Wendy - 01/02/2023			0.00
<input type="checkbox"/> 03/05/2023	1..		Wen...	Family of Ca...	as Ga... S10874	03/20/2023	20.00	0.00
<input type="checkbox"/> 01/02/2023	DPCV/2023/...	1..	Wen...	Family of Ca...	as Ga... Customer Payment 20.00 B...	01/02/2023	0.00	20.00
<input type="checkbox"/> 02/21/2023	1..		Wen...	Family of Ca...	Jabrie... S09212	03/20/2023	150.00	0.00
<input type="checkbox"/> 02/21/2023	1..		Wen...	Family of Ca...	as Ga... S09213	03/20/2023	150.00	0.00
<input type="checkbox"/> 12/31/2022	1..		Wen...	Family of Ca...	Jabrie... S10310	01/20/2023	150.00	0.00

11. To validate that the payroll discount payment is applied, go to 'ACCOUNTING - RECEIVABLE LEDGER'.

12. **OBSERVATION:** In some cases, when the payment is manually loaded, the student's information may not be created completely. Therefore, we need to go to 'ACCOUNTING - CUSTOMER – PAYMENT' and verify that the child's and family's data are present. If the information is incomplete, as shown in the illustration, we need to change the journal entry to draft status, complete the information, save, and confirm it.

Accounting + 2 0 [ ] X [ ] M [ ]

Invoices / Draft Invoice MBWCV/2023/00220

EDIT CREATE Print Action 1/3 < >

**CONFIRM** PREVIEW CANCEL GENERATE LATE FEE APPLY LATE FEE POSTED

Preview Invoice

Customer Invoice

# MBWCV/2023/00220

Customer	Wendy	Invoice Date	01/02/2023
	- 8807667	Due Date	01/02/2023
Payment Reference	MBWCV/2023/00220	Journal	Monedero Matricula CV in PAB
Students		Late Fee Rule	
Family			
Grade Level			
Program			
School			

13. We need to be clear whether we are saving the payment or the journal. If the invoice is cancelled, we have to restore it to draft status. To do this, go to ACCOUNTING—CUSTOMER—INVOICE—enter the invoice. If it is cancelled, we have to set it back to draft, confirm, and then it will give us the option to register the previously made payment.

The screenshot shows the Odoo Accounting interface for an invoice. The header includes the 'Accounting' menu, a search bar, and a user profile. The main header displays 'Invoices / MBWCV/2023/00220' with 'EDIT' and 'CREATE' buttons. Below this, there are 'Print' and 'Action' icons. The invoice details show 'MATRÍCULA CV' for 'Carvalho Aguirre, Luc...' with a quantity of 1.00 and a price of 150.00 B/. The terms and conditions are listed as 'https://aip-cv.odoo.com/terms'. The total amount is 150.00 B/. The amount due is also 150.00 B/. The 'Outstanding credits' section is highlighted with a red box, showing the 'ADD' button and the invoice details.

Quantity	Unit Price	Total
1.00	150.00	150.00 B/.

Términos y condiciones: <https://aip-cv.odoo.com/terms>

Total: 150.00 B/.

Amount Due: 150.00 B/.

Outstanding credits

Action	Invoice Number	Amount
ADD	MBWCV/2023/00220	150.00 B/.

14. Once confirmed, we go to the bottom part and add the previously processed payment by clicking on the word "ADD".

Accounting

Invoices / MBWCV/2023/00220

EDITCREATEPrintAction1 / 2

Invoice Lines	Journal Items	Other Info	Tuition plan	Late fee rule items	Late fees				
Produ...	Label	Student	Account	Analytic Account	Quantity	UoM	Price	Tax...	Subtotal
	MATRÍCULA CV		23606-2 Adelanto M...		1.00		150.00		150.00 B/.

Términos y condiciones: <https://aip-cv.odoo.com/terms>

Journal Entry Info

Amount: 150.00 B/.  
Memo: DPCV/2023/01/0011  
(MBWCV/2023/00220)  
Date: 01/02/2023  
Journal: Deducción de Planilla CV (Manual)  
UNRECONCILEVIEW

Total: 150.00 B/.

Paid on 01/02/2023 150.00 B/.

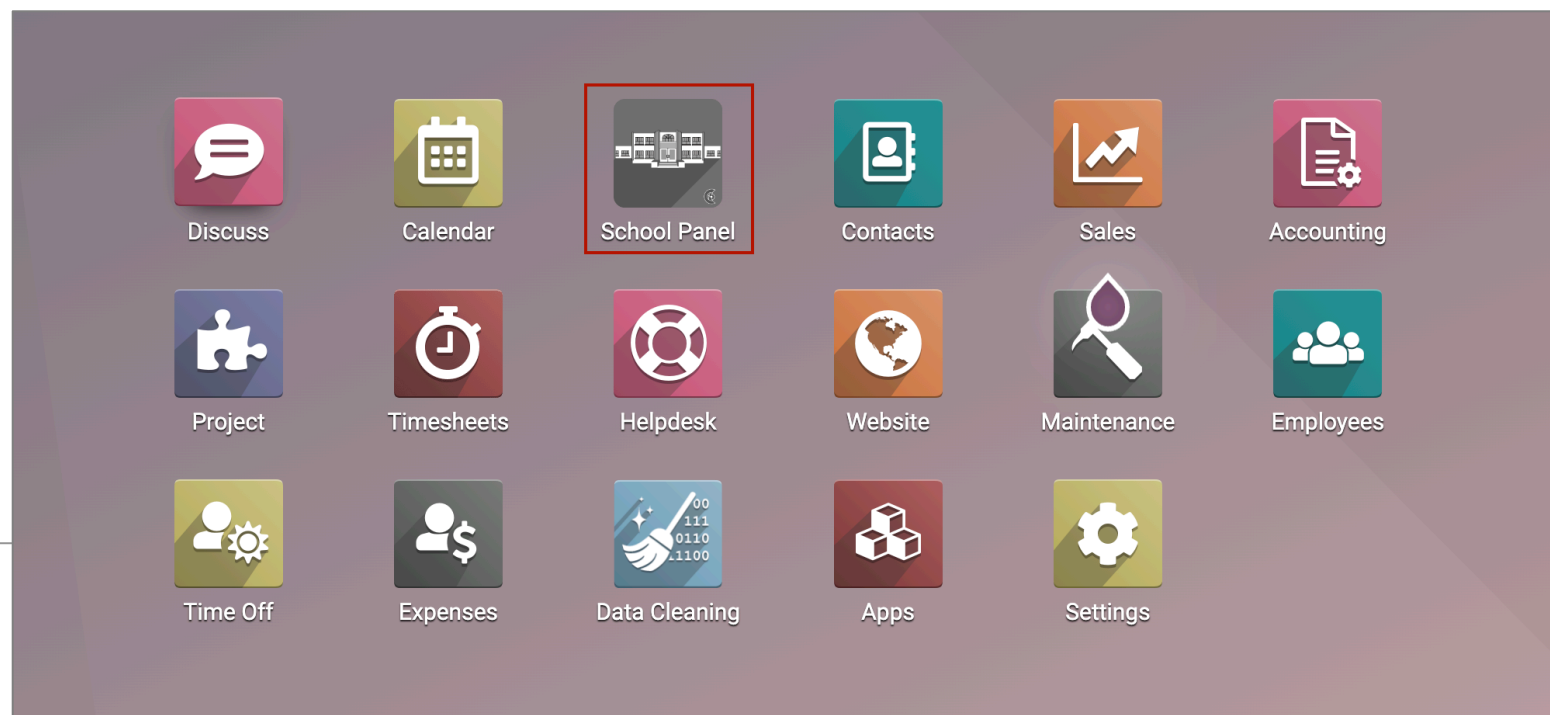
Amount Due: 0.00 B/.

15. Leaving the payment correctly applied.

## 9 Advanced Features: How To Manually Enroll Students

EduWeb can synchronize students, families, and individuals' demographics data from 3rd party SIS software such as FACTS (formerly RenWeb) and PowerSchool into Odoo School Panel through API integration. We have a well-tested SIS synchronizer that automatically pulls data from an SIS into Edoob School Panel every 30-minute interval.

Schools without Student Information System (SIS) can manually enroll students and establish relationships with their respective families' information. Work on the steps that follow to configure your School Panel data:



Start with navigating to the School Panel app.

# 9.1 Configuration

School Panel

People management

Finance Management

Reports

Configuration

Students

ENROLL NEW STUDENT

Settings

School structure

District

School

Program

Period

Grade levels

Student Department

1. Go to Configuration > click Settings

Settings

SAVE

DISCARD

General Settings

Sales

Sincro Data

School

Website

Accounting

Project

Timesheets

Employees

Expenses

Contact

Name Sorting

This will set the pattern used for names

Spaces will be replaced to • only for better visualization

Name	Prefix	Suffix	
Last Name			✕
First Name			✕
Middle Name	,		✕
Add a line			

RECOMPUTE NAMES

Allow editing contact name

☒ Allow edit person name

☒ Allow edit student name

☒ Allow edit parent name

Name Sorting Example

Last First, Middle

Finance

☐ Split charges by students

Grant discounts on sales order lines

20

Recurring charge Automated Batch Limit

20

Set Tuitionplan to charge Batch Limit

20

Charge to Post & Send Automated Batch Limit

2. Under Contact, specify the name sorting following the school’s branding. If needed, you can click on “Add a line” if needed.

The “Name Sorting Example” on the rights side shows how the names will look like based on your Name Sorting set.

3. Click Save.

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School Panel

People management

Finance Management

Reports

Configuration

Settings

SAVE DISCARD

General Settings

Sales

Sincro Data

Contact

Name Sorting

This will set the pattern used for names  
Spaces will be replaced to • only for better visualization

Settings

School structure

District

School

Program

Period

Grade levels

4. Going back to Configuration, click Grade levels

Note: District, School, Program, and Period are usually set by EduWeb.

School Panel

People management

Finance Management

Reports

Configuration

Grade Levels

CREATE

5. Click Create

Grade Levels / New

SAVE DISCARD

Name

Capacity

Next Program

Next Grade Level

Next Status

0

EN

Program

School

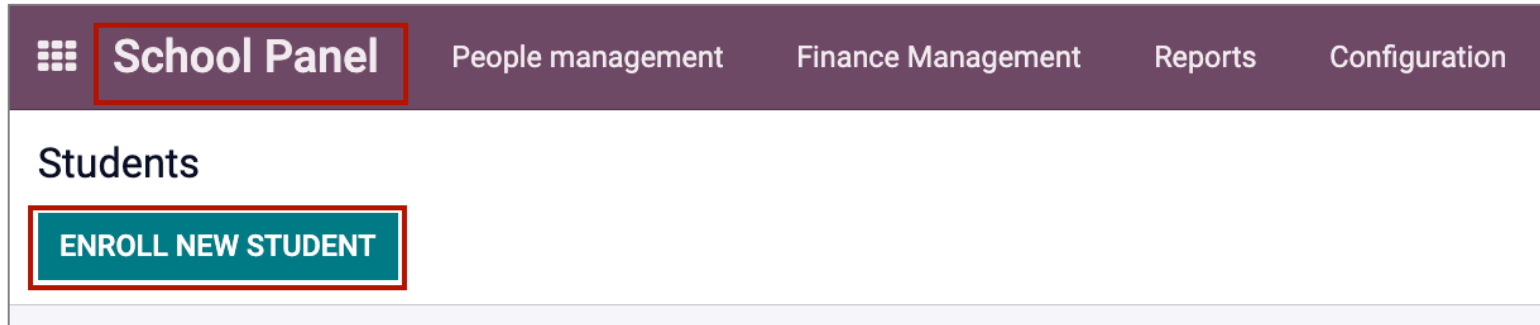
District

6. Starting with the lowest grade level, fill in the necessary details.

Ex: Name: 1; Next Grade Level: 2; Next Status: Enrolled

7. Click Save

## 9.2 Enroll New Student




1. Click on School Panel
2. Click the Enroll New Student button



3. Click Add

Create Student

Sanders Allan, Peter



First Name

Allan

Middle Name

Peter

Last Name

Sanders

Gender

Male

Date of birth

04/01/2018

Email

Phone

Address

Street...

Street 2...

City

State

ZIP

Country

Enrollment state

Curre...	Grade I...	Current ...	Current ...	Next pr...	Next gr...	Next st...	Next su...	Enrolled da...	Graduation...	Withdraw ...	Note	
Standard	01	Admission		Standard	02	Enrolled		06/15/2023				
<div>Add a line</div>												

SAVE & CLOSE

SAVE & NEW

DISCARD

4. On the form that will appear, fill in the student's information including the Enrollment State.

For Gender, you can choose from the dropdown. Otherwise, just type in to create on the fly.

5. Once set, click on Save & Close.

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Page 94 of 100

Student

ADD

Sanders Allan, Peter

NEXT

6. Click Next

Family

ADD

ADD EXISTING FAMILY

PREV NEXT

7. If there's already an existing family on file, click on Add Existing Family. For completely new record, click Add.

### Create Family

Name

Family of Sanders, Aris and Edna

Student


☒ Sanders Allan, Peter

Individuals

ADD


ADD EXISTING INDIVIDUAL

ADD INDIVIDUAL FROM OTHER FAMILY IN FORM



Sanders Aris, Franco

(Individual 1)



Sanders Edna, Song

(Individual 2)

SAVE & CLOSE

SAVE & NEW

DISCARD

8. Under the Individuals tab, click the first tile then add the “head of the family” details > Save. Note that this person will be set as the default “Customer” when issuing an invoice.

Then click on the 2<sup>nd</sup> tile (Individual 2) for the other parent's information.

Notice the Name field at the top automatically populates after adding the individuals' information.

9. Click Save & Close.

Family

ADD

ADD EXISTING FAMILY

Family of Sanders, Aris and Edna

PREV

NEXT

10. For cases of divorced parents and each have their own families, you can add another family. In normal cases, click Next.

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## Relationship

Relationships

Student	Individual	Relationship	
Sanders Allan, Peter	Sanders Aris, Franco	Father	▼ ↗
Sanders Allan, Peter	Sanders Edna, Song	Mother	

PREV NEXT

11. The next page shows the student's relationship with the family's individuals based on the data entered in step 8 & 9. Relationship can be edited in this page.

12. Click Next

Tuition Template

Standard Yearly Tuition K-5 ▼ ↗

Confirm tuition plans after creation

☐

PREV ENROLL

13. Choose the Tuition Template

14. Click Enroll

Sanders Allan, Peter

SAVE

DISCARD

1

Tuition plans

Student

Sanders Allan, Peter

0

First Name

Allan

Middle Name

Peter

Last Name

Sanders

Address partner link

Address

Street...

Street 2...

City

State

ZIP

Country

Families

Relationships

Healthcare

Academics

Enrollment history

Other

Demographics

Finance

Wallet

Individual

Relationship type

Custody

Correspondence

Grade Related

Family Portal

Emergency contact

Invoice recipient

Sanders Aris, Franco

Father

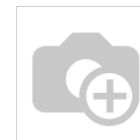
Sanders Edna, So

Mother


Add a line

13. Go to the Relationships tab to configure the specific relationships.
- Family Portal – who can access the portal of Odoo and view the family statement of account
- Invoice Recipient - will receive an email every time there's an invoice created
14. Save

## Student Sanders Allan, Peter 0



First Name	Allan	Address partner link	
Middle Name	Peter	Address	Street...
Last Name	Sanders		Street 2...
			City State ZIP
			Country

Families	Relationships	Healthcare	Academics	Enrollment history	Other	Demographics	Finance	Wallet	
Financial responsibilities	Family	Category					Percentag...		
	Family of Sanders, Aris and Edna				All		100% 		
	<a href="#">Add a line</a>								

15. Navigate to the Finance tab

Click Add a Line to set the Financial responsibilities.

Family – shows the family/ies linked to the student

Category – refers to product category set in Accounting/Inventory. When a charge is created, the system will check the product's corresponding category and map the financial responsibility as to which family to charge.

Percentage – each category should have a 100% total %. For split billing as in the case of divorced parents, two lines for two families can be added with 50-50 percentage.

### IMPORTANT!!

Missing Financial responsibilities configuration raise an error when creating an invoice for the student.

Missing product category configuration in financial responsibilities raise an error when creating an invoice.

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