Tuition Plan and Tuition Template

Summary

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.
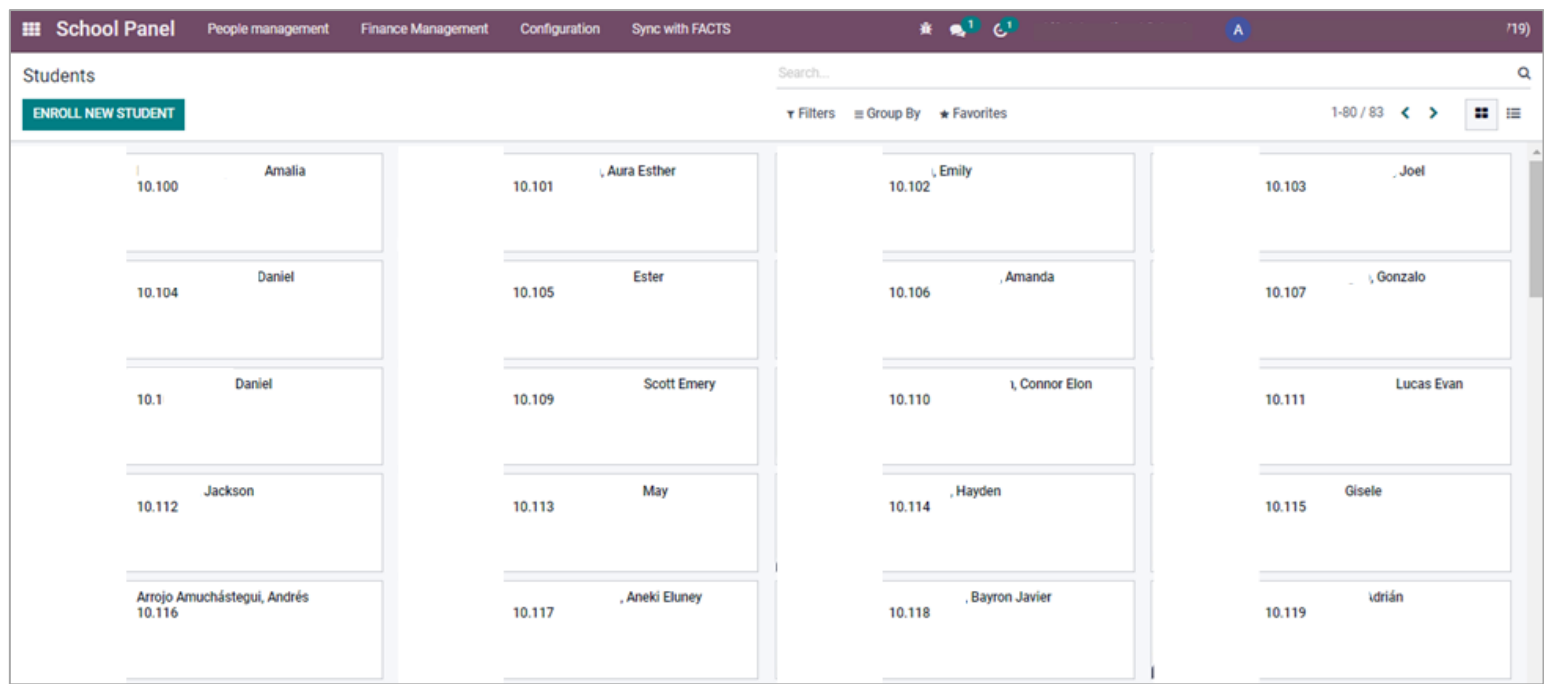
This document covers the step-by-step instructions.

2 Odoo Configuration

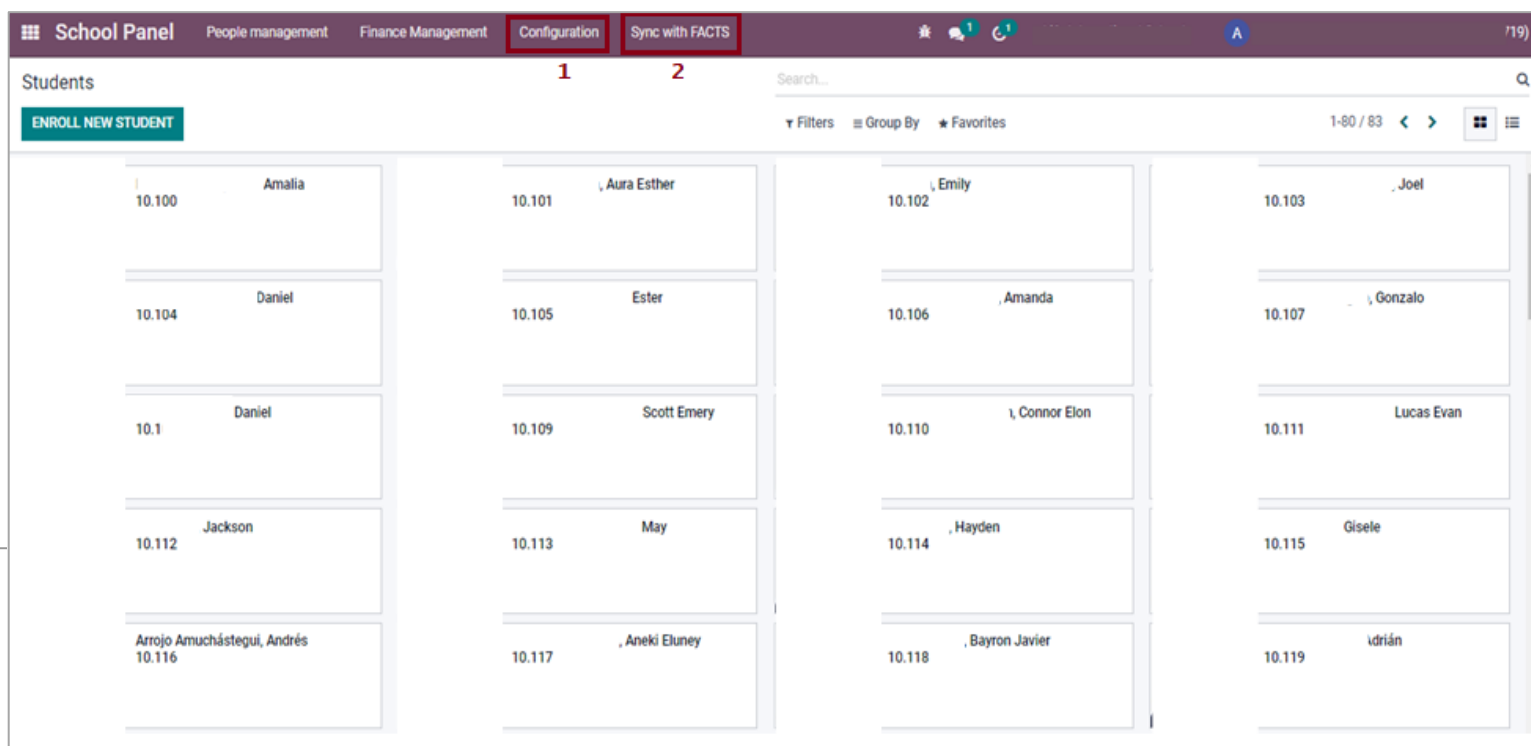FACTS configuration will be set by EduWeb as part of the custom module installation

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.

School Panel   People management   Finance Management   Configuration   Sync with FACTS

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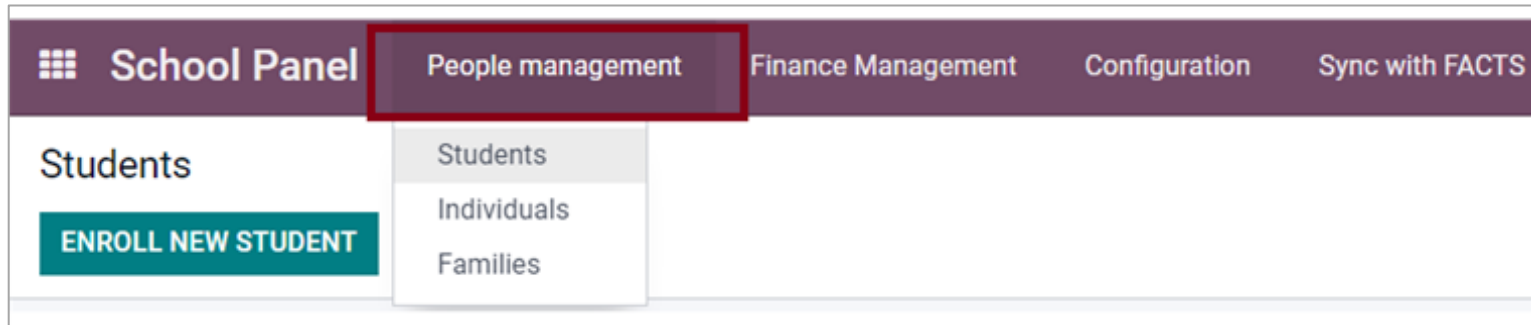
2. By navigating to "People Management," you can find the sections for Students, Individuals, and Families.

These are the automatically synced data from FACTS.

2.2   Demographics
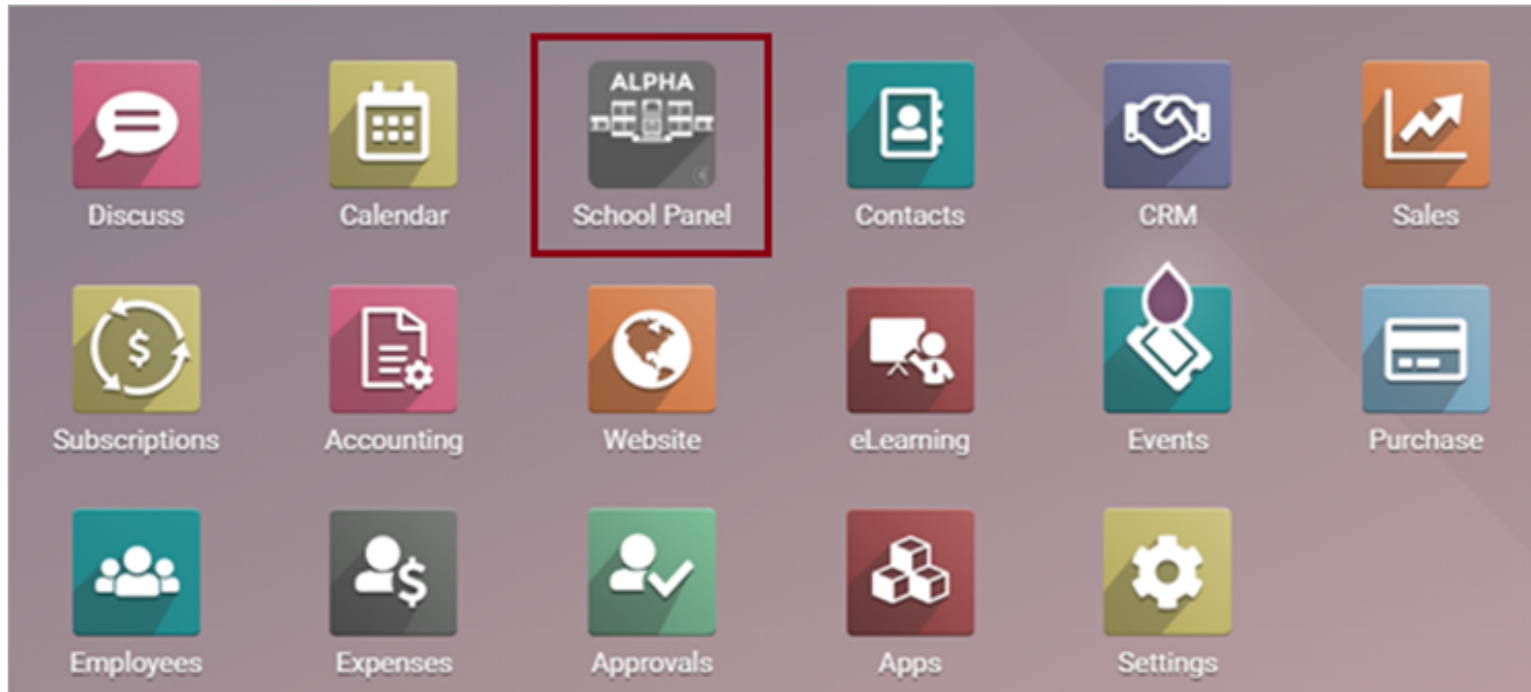
1. From Odoo Menu, go to school panel.

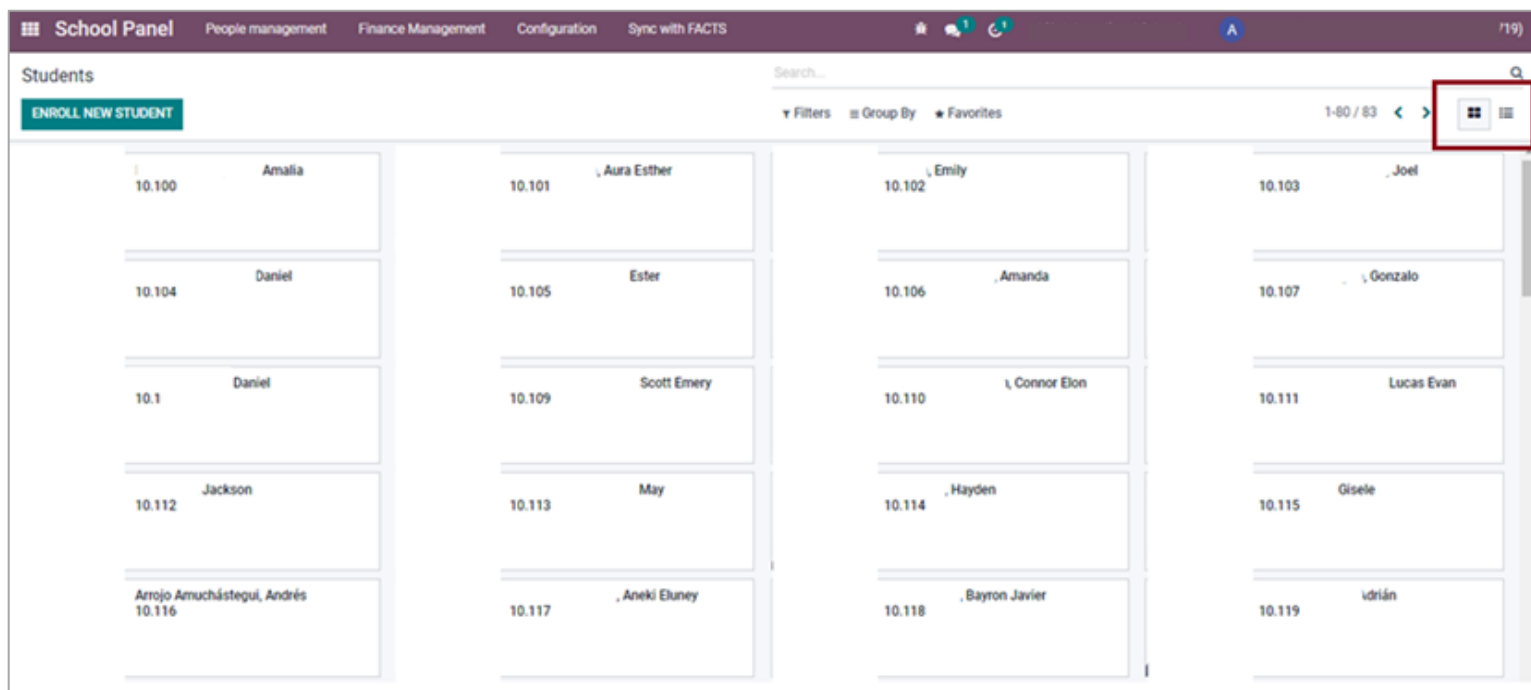2. After clicking on the School Panel, you have the option to change your preferred view between list view or Kanban view. You can find this option in the upper right-hand corner. It's worth noting that the list and Kanban view also apply to individuals and families.
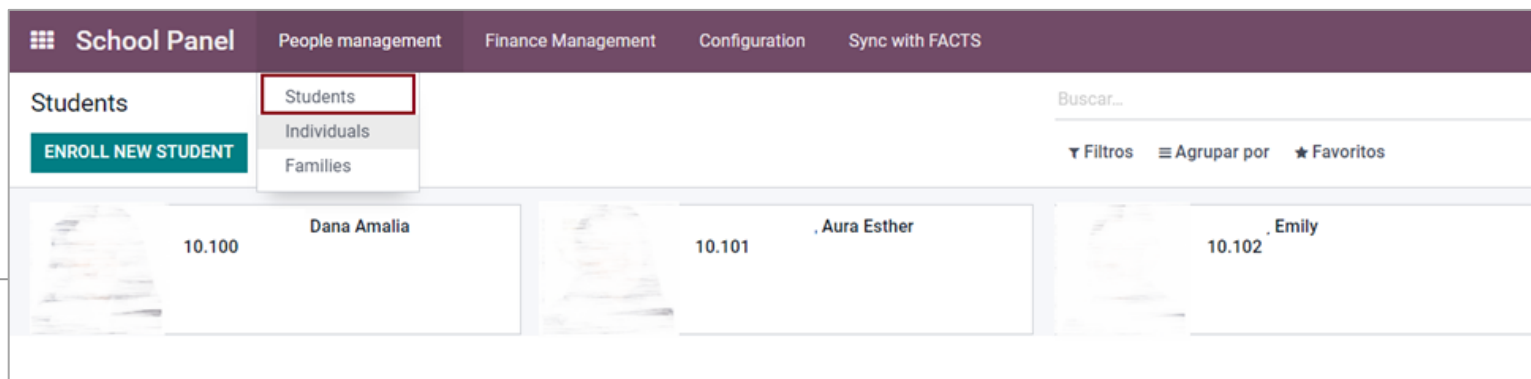
3. To access the student's information, navigate to People Management and click on "Students." This action will display the image below. From there, you can select the specific student of your choice, and the landing page will show all the students.

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.

Students /

GUARDAR   DESCARTAR

↻ Sync from WS

Student
Flores Santana, 10.101

First Name	Aura Esther	Address partner link
Middle Name		Address
Last Name		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 línea

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

⠿ **School Panel**	People management	Finance Management	Configuration	Sync with FACTS

Students / Flores   Amalia

EDITAR   **ENROLL NEW STUDENT**   **MAKE CHARGE**   ⚙ Acción

⤺ WS   ⤺ Tuition pla...

Student

, Dana Amalia

10.100

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**		**Category**	**Percentage (%)**	⋮
	Family of		Tuition	100% 🗑	
	Family of		Student Fees	100% 🗑	
	Agregar línea				

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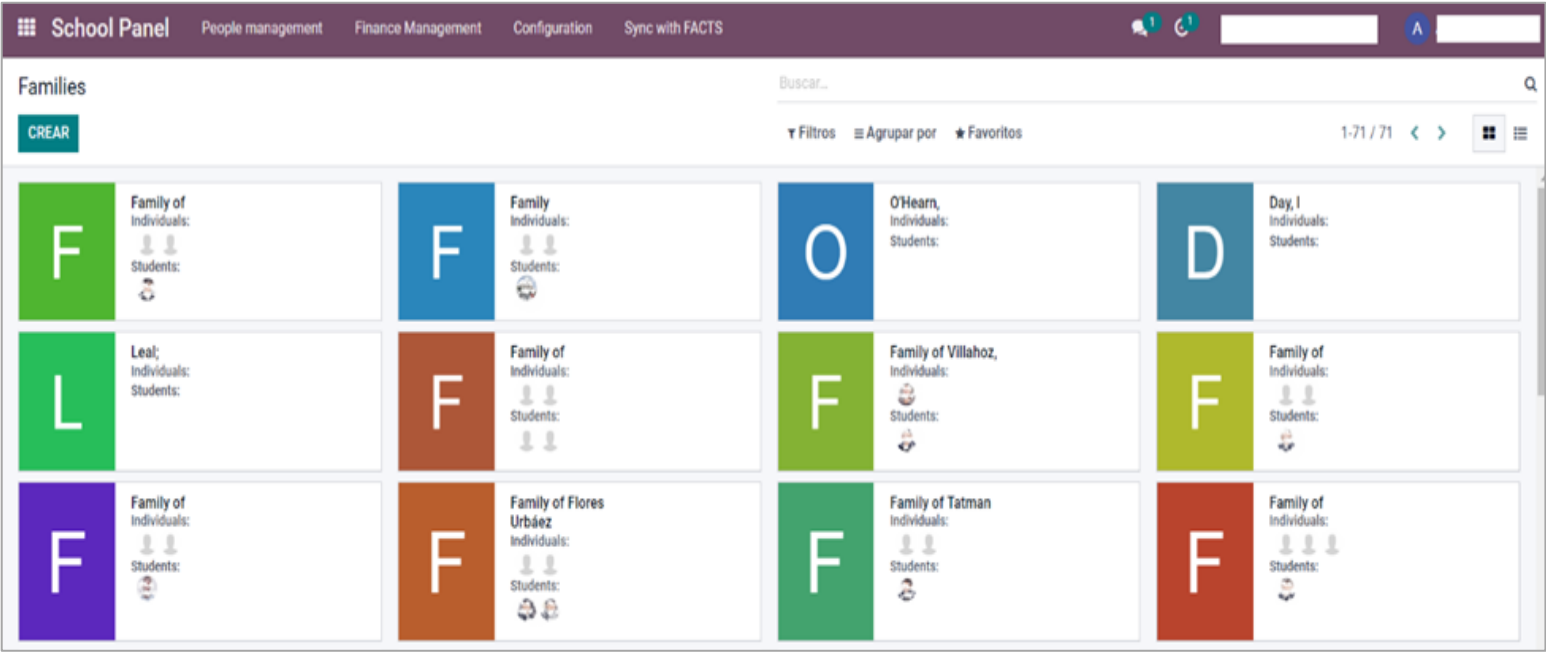
8. To access the family information, go to "People Management" and click on "Families." The displayed image shows various details such as individuals, students, and finance. These details are synchronized from FACTS.

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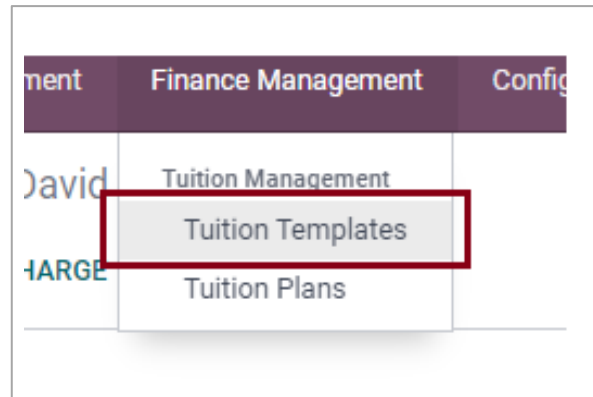
1. To view the tuition fees for each grade level, go to Finance Management and click on 'Tuition Template'.
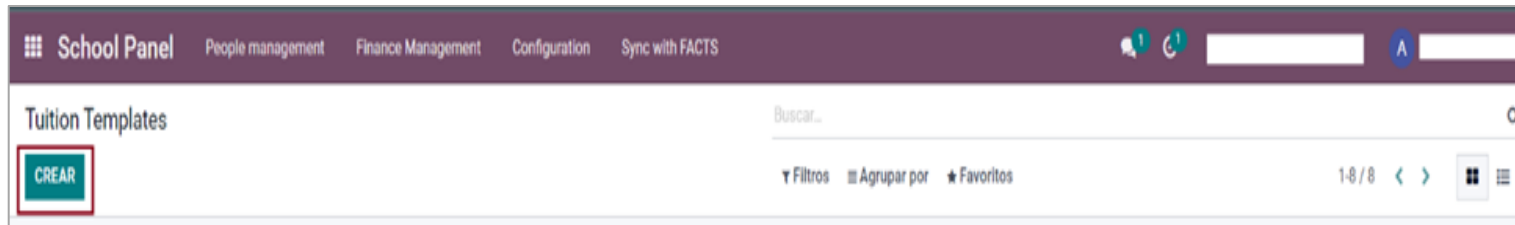
2. Click "create".

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 línea						

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

Invoice Method	Sale order
Post-action option	Confirm

Accounting

Fiscal Position	
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	September October November December January February March April May June	700000 Tuiti...	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	September October November December January February March April May June	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	September October November December January February March April May June	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	September October November December January February March April May June	700000 Sales of goods in Spa.	P3 P4	10,00	345,00 €		0,00		

Add a line

- ☑ Product
- ☑ Installments
- ☑ Account
- ☑ Grade levels
- ☐ Domain
- ☐ Journal
- ☑ Taxes
- ☑ Discount
- ☑ Subtotal

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 ☑

Studets

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 ✕

Buscar...

MAKE A CHARGE   80 seleccionado   → Seleccionar todo 82

▼ Filtros   ≡ Agrupar por   ★ Favoritos   1-80 / 82   ‹ › ›

⚙ Acción

☑	Nombre	Facts ID	UDID	⋮
☑	Flores Santana,		10100	
☑	Flores Santana,		10101	
☑	Tatman,		10102	
☑	González		10103	
☑	Cordero		10104	
☑	Cordero Gómez-Lor,		10105	
☑	Sanchez Dimitrova,		10106	
☑	Alcántara Rengifo,		10107	
☑	Herrera,		10108	
☑	Bolles		10109	
☑	Bolles		10110	
☑	Bolles		10111	

SELECCIONAR   CREAR   CANCELAR

School Panel   People management   Finance Management   Configuration   Sync with FACTS

Tuition Templates / Tuition Plans

CREAR

Buscar...

▼ Filtros   ≡ Agrupar por   ★ Favoritos

1-80 / 80   < >

TP/	TP	TP
Total:	Total: 0,00 €	Emily
		Total: 0,00 €

TP	TP/2023/000048	TP/
, Joel		
Total: 0,00 €	Total:	Total: 861,00 €

TP/2023/000050	TP
, Amanda	Gonzalo
Total: 0,00 €	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		**Program**	
Tuition Template	Pre-K - Half Day	**Default journal**	Customer Invoices
Next installment	October	**Payment terms**	Pago inmediato
To Charge	☐	**Merge group**	/
Student grade levels	P4		

Lines | Installments | Sibling Students | Recurring options

Product	Description	Installments	Account	Quantity	Unit price	Tax...	Subtotal
Mensualidad	Tuition	September October November December January February March April May June	700000 Tuition	1,00	345,00 €		276,00 €
Registration - Existi...	Registration	September	700000 Tuition	1,00	75,00 €		75,00 €
School Materials	School Materials	September	700200 Student Fees	1,00	280,00 €		280,00 €
Capital Fund	Capital Fund	September	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.
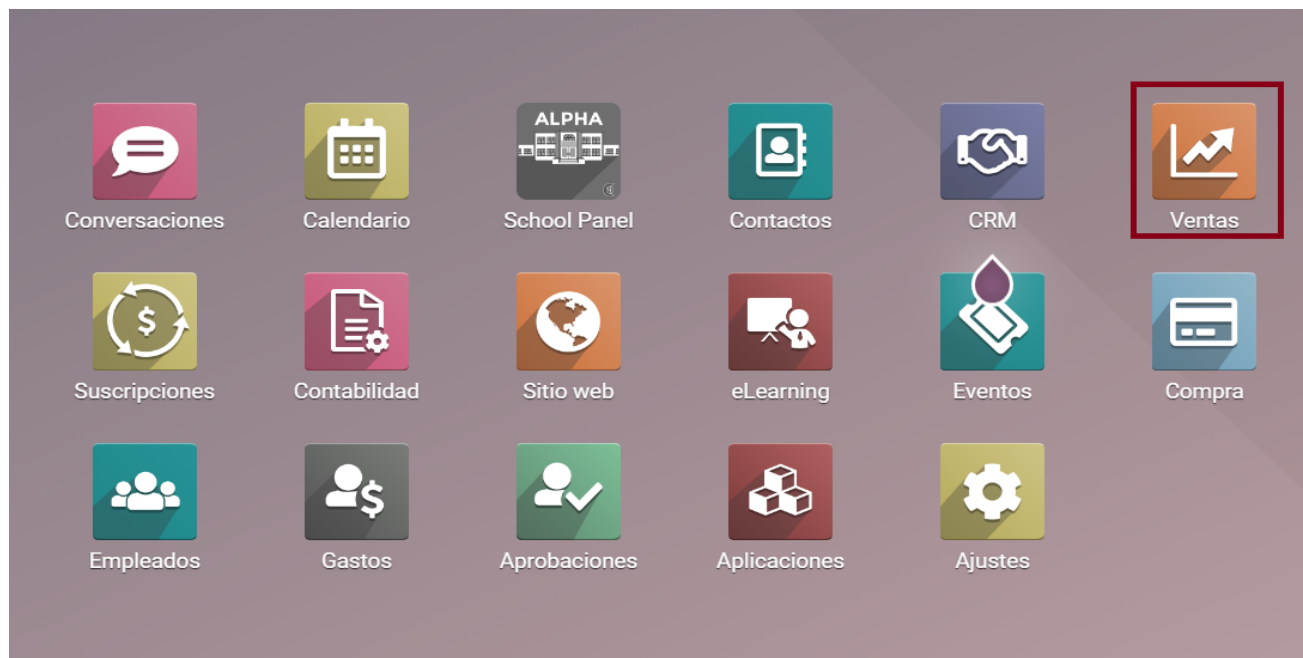
6. If you want to send the sales order via email. Go to "Sales".

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
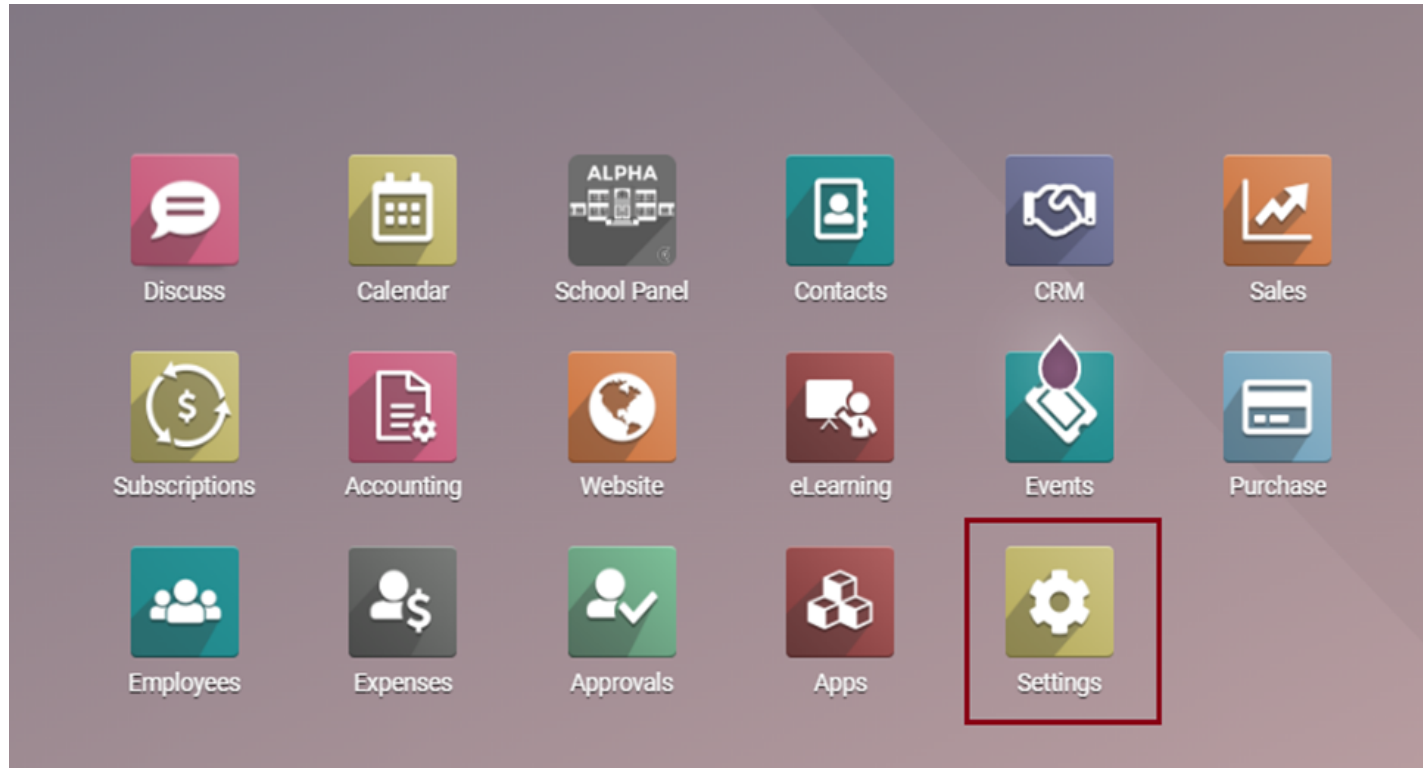
1. Go to "Settings".
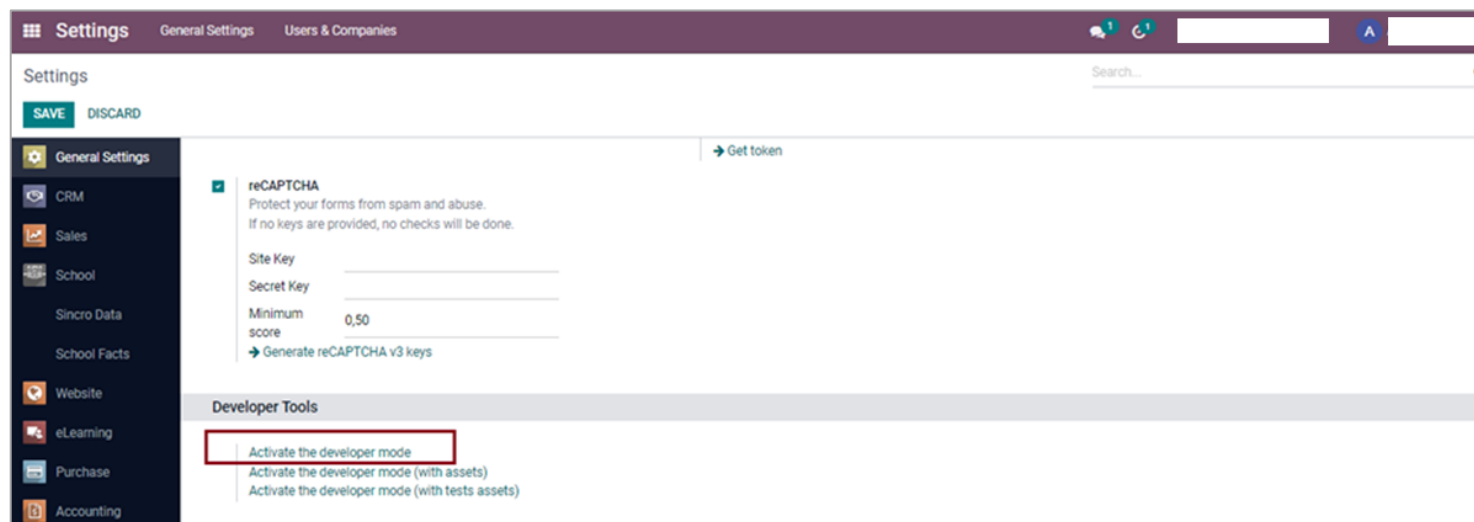
2. Scroll down to "Developer Tools", then click on "activate the developer mode".
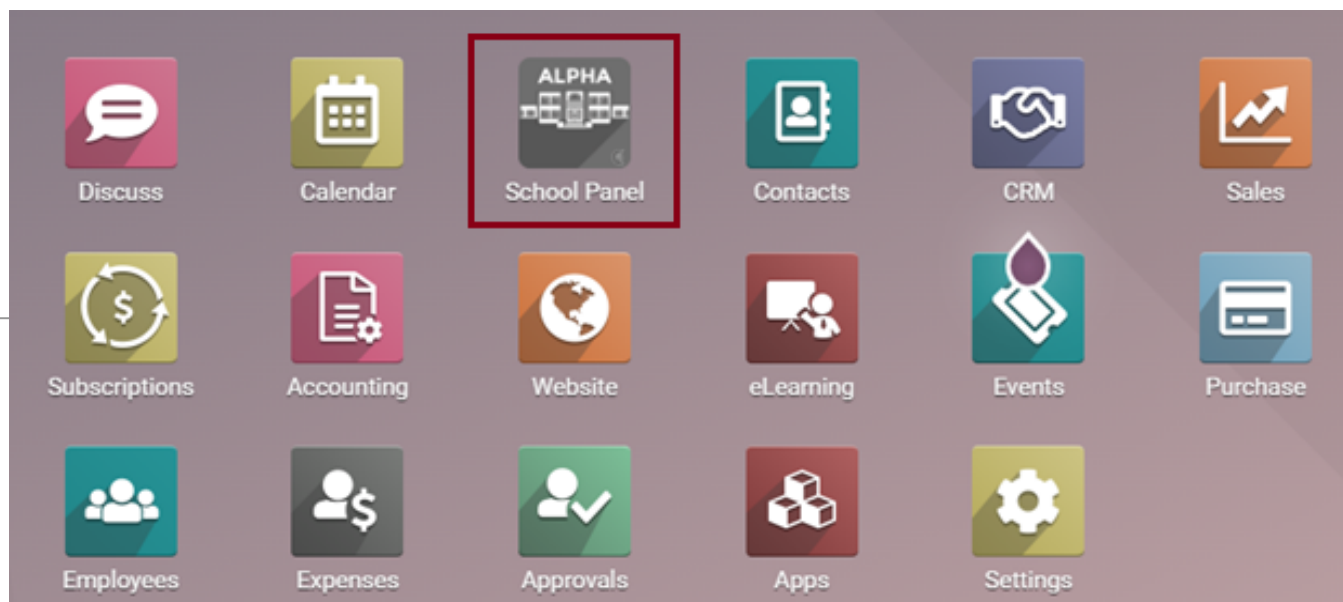
3. After that go to "School Panel".

::: **School Panel**	People management	Finance Management	Configuration	Sync with FACTS

Students

ENROLL NEW STUDENT

4. Go to 'Finance Management'.

::: **School Panel**	People management	Finance Management	Configuration	Sync with FACTS

Tuition Templates

CREATE

Tuition Management
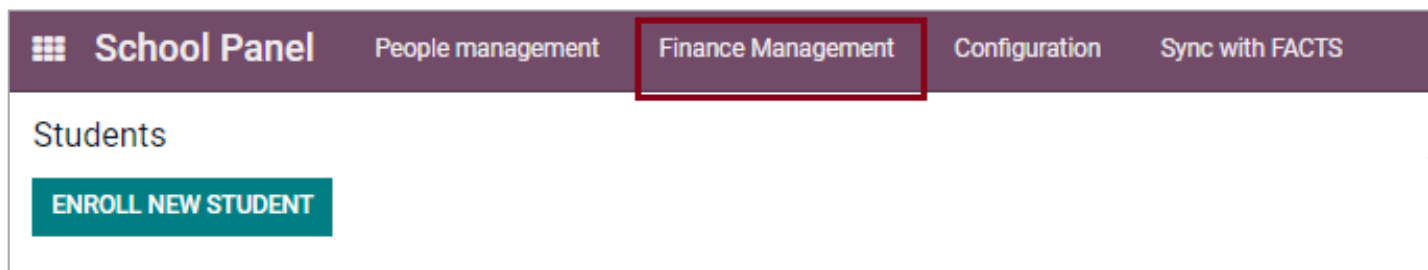
Tuition Templates
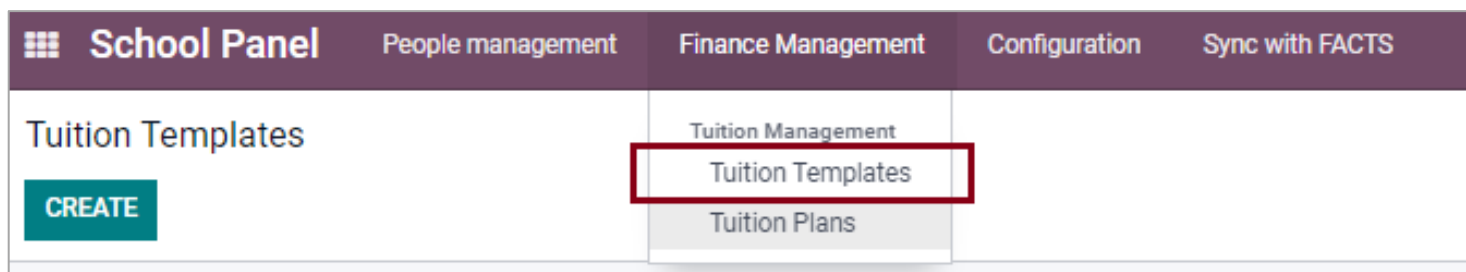
Tuition Plans

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	September October November December January February March April May June	700000 Sales of goods in...		Match records with ANY of t Enrollment History > Next 19 RECORD(S) →	10,00	480,00 €	0,00	4.800,00 € 🗑	

Add a line

7. Click on "Edit".

Discount	Subtotal	⋮
0,00	☑ Product	
	☑ Installments	
	☑ Account	
	☑ Grade levels	
	☑ Domain	
	☑ Journal	
	☑ Taxes	
	☑ Discount	
	☑ Subtotal	

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

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

10. Go to "Domain", then click "Edit Domain".
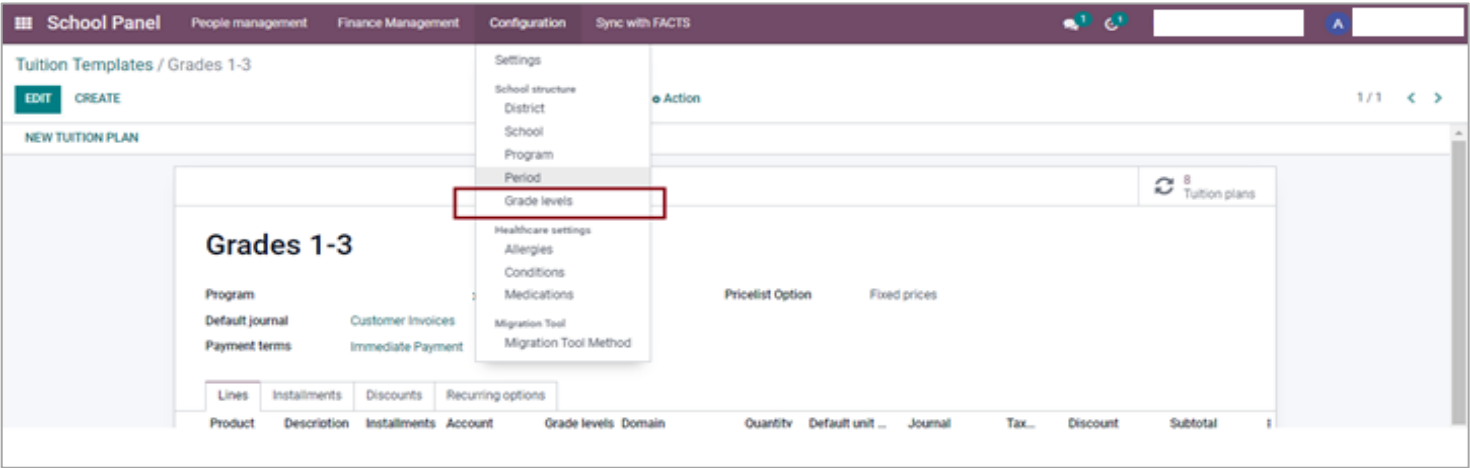
11. On the duplicate tab, go to "Configuration" then click "Grade Levels".
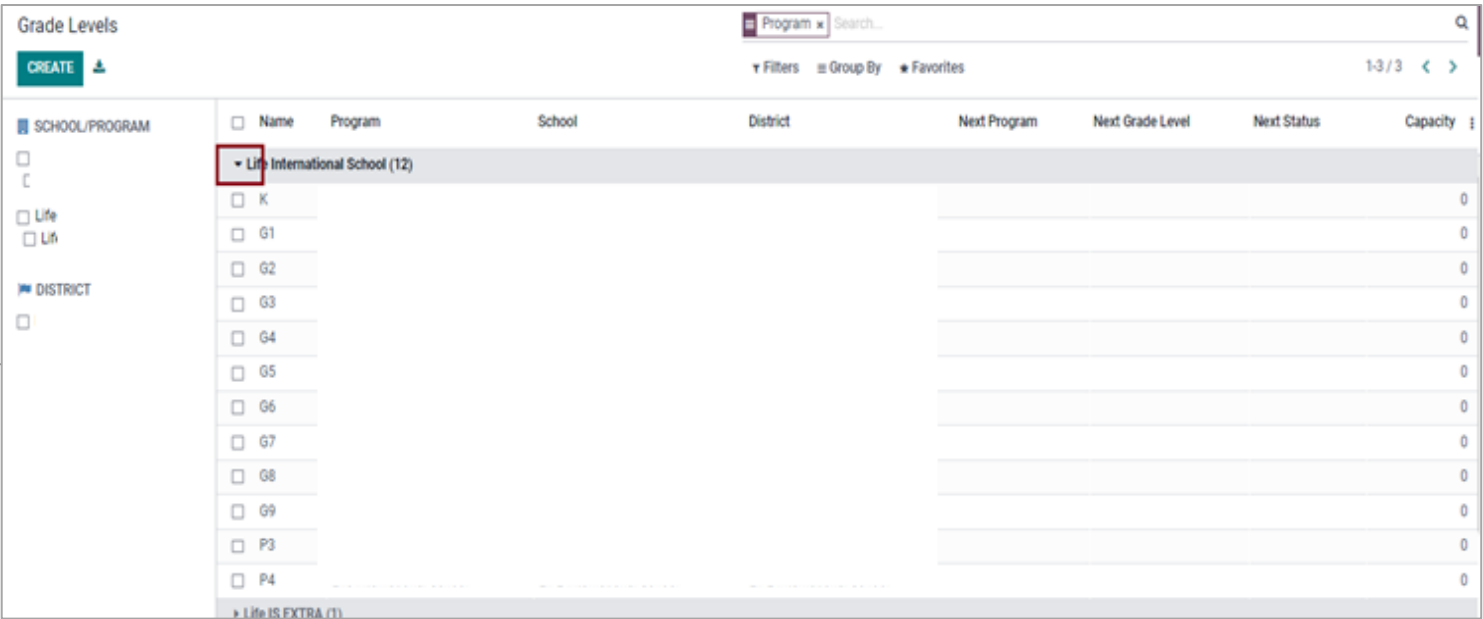
12. To view the information, click on the 'unfold' option

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   Finance Management   Configuration   Sync with FACTS   Life International School

Tuition Templates / Grades 1-3

Domain   ✕

SAVE   DISCARD

Match all records   **+ ADD FILTER**   4 / 11   ‹ ›

Name

```
# Code editor
{}
```

Grad

Program

Default jo   SAVE   DISCARD

Payment

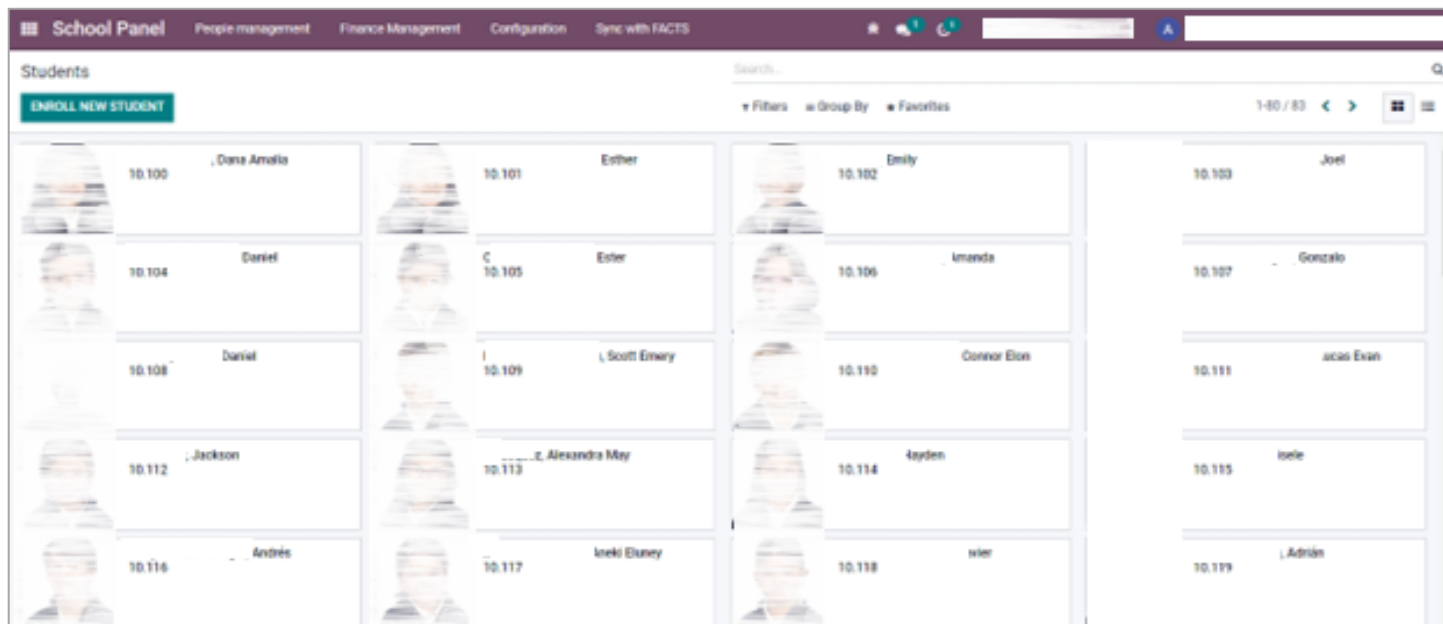Lines   Installments   Discounts   Recurring options
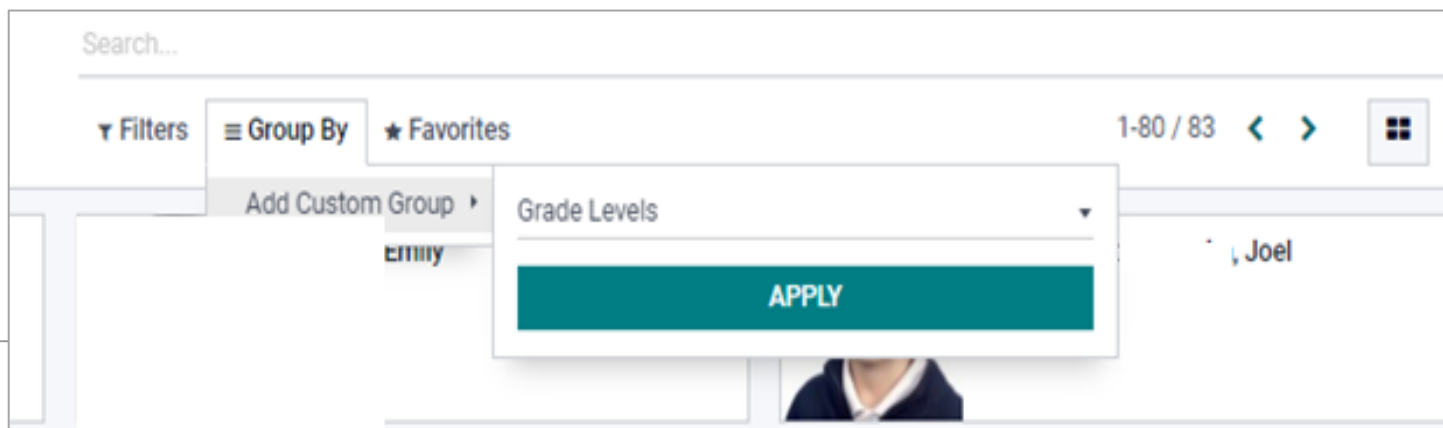
Product   Description   Installments   Account   Grade levels   Domain   Quantity   Default unit ...   Journal   Tax...   Discount   Subtotal

14. To begin the configuration process, return to the first tab and click on 'Add Filter'.
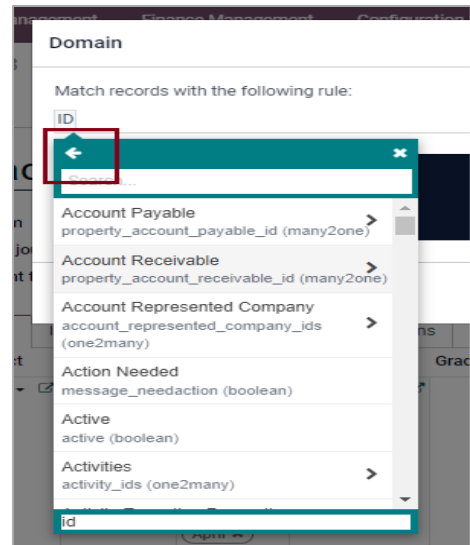
15. Click "ID", then go to previous button arrow.

16. Search for "Enroll States" and "Next Grade Level".

School Panel   People management   Finance Management   Configuration   Sync with FACTS

Grade Levels / G1

EDIT   CREATE   ⚙ Action

Name	G1	Program
Capacity	0	School
Next Program		District
Next Grade Level		
Next Status		
Facts ID	0	
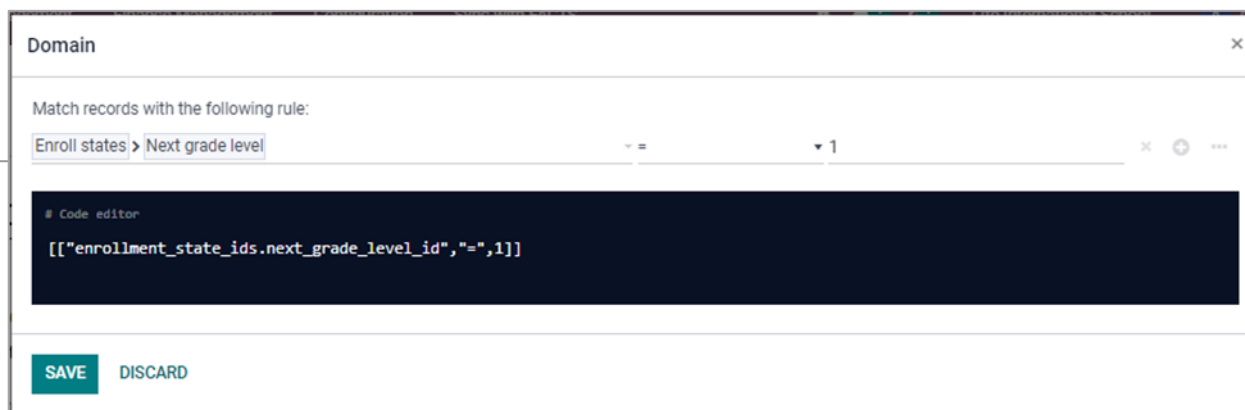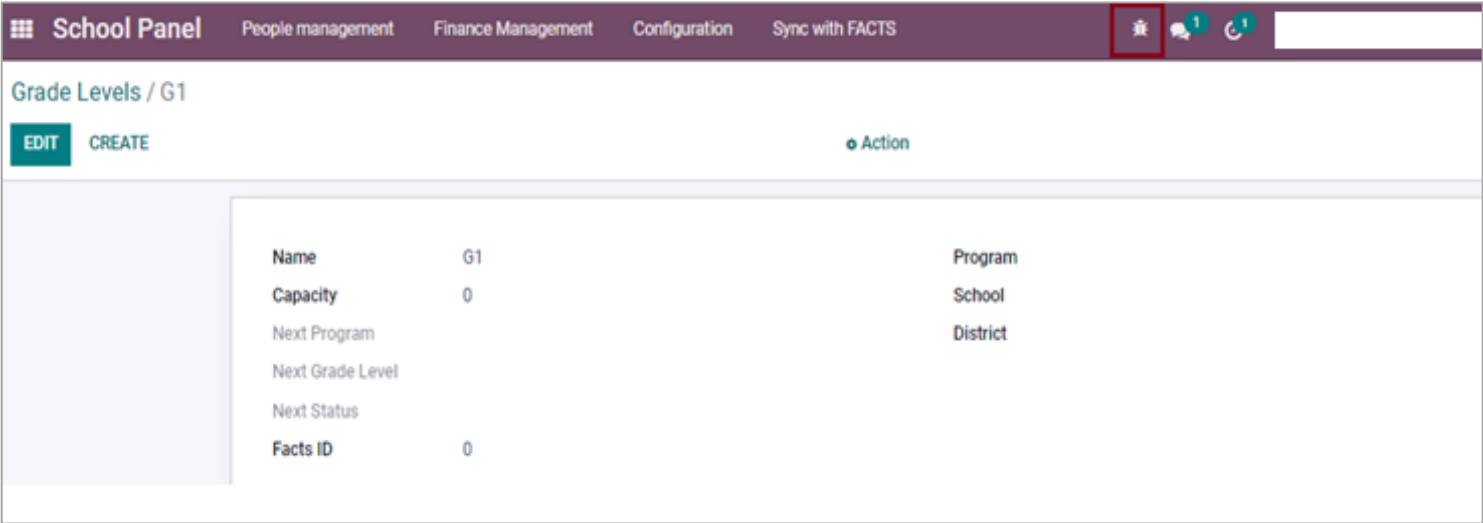
17. The 'Grade Level ID' is required in the code, which can be obtained from the second tab by clicking on the bug icon.

Sync with FACTS   A

Run JS Tests
Run JS Mobile Tests
Run Click Everywhere Test
Open View
Disable Tours
Start Tour   2 / 12   <   >

Edit Action   fe International School
View Fields   FE International School (LIFE)
Manage Filters   FE International School (LIFE-ESP)
Technical Translation

View Access Rights
View Record Rules   ⟳ Sync from WS

Set Defaults
View Metadata
Manage Messages
Manage Attachments
Fields View Get

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 | ✕ ⊕ ⋯ |
| Enroll states > Next grade level | ▾ = | ▾ 1 | ✕ ⊕ ⋯ |

```
# 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".

	Name	Program	School	District	Next Program	Next Grade Level	Next Status	Capacity ⋮
▾	Life International School (12)							
☐	K							0
☐	G1							0
☐	G2							0
☐	G3							0
☐	G4							0
☐	G5							0
☐	G6							0
☐	G7							0
☐	G8							0
☐	G9							0
☐	P3							0
☐	P4							0
▸	Life IS EXTRA (1)							
▸	Undefined (1)							0

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

People management	Finance Management	Configuration	Sync with FACTS				

Run JS Tests
Run JS Mobile Tests
Run Click Everywhere Test
Open View
Disable Tours
Start Tour

Edit Action
View Fields
Manage Filters
Technical Translation

View Access Rights
View Record Rules

Set Defaults
View Metadata
Manage Messages
Manage Attachments
Fields View Get

3 / 12

Name	G2
Capacity	0
Next Program	
Next Grade Level	
Next Status	
Facts ID	0

le International School

Sync from WS

23. Go to bug icon then click "View Metadata".

View Metadata ✕

ID:	3
XML ID:	/
No Update:	false
Creation User:	
Creation Date:	18/01/23 10:38:54
Latest Modification by:	
Latest Modification Date:	18/01/23 10:38:54

OK

24. Then get the ID from Grade 2.

Domain ✕

Match records with **ALL ▾** of the following rules:

| Enroll states > Next grade level | ▾ = | ▾ 2 | ✕ ⊕ ⋯ |
| Enroll states > Next grade level | ▾ = | ▾ 3 | ✕ ⊕ ⋯ |

```
# 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".

	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 Enroll states ⟩ N ➔ 17 RECORD(S)	10,00	480,00 €	Customer Invo...		0,00	4.800,00 € 🗑

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

EDIT   CREATE   ⚙ Action

NEW TUITION PLAN

8
Tuition plans

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

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

🐞 Odoo   ✕

Post tuition plans   ☐

Studets

Name   Facts ID   UDID

Add a line

Cancel   CONFIRM

31. Click "Add a line".

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

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**		
☑		10126		
☑		10136		
☑		10137		
☑		10140		
☑		10147		
☑		10311		
☑		10319		
☑		10328		
☑		10341		
▸	G2 (3)	30.412		
▸	G3 (8)	81.100		
▸	G4 (13)	121.784		

SELECT CREATE CANCEL

Cancel CONFIRM

34. Click "Select". Then confirm.

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

::: School Panel	People management	Finance Management	Configuration	Sync with FACTS

Students

Tuition Management

Tuition Templates

Tuition Plans

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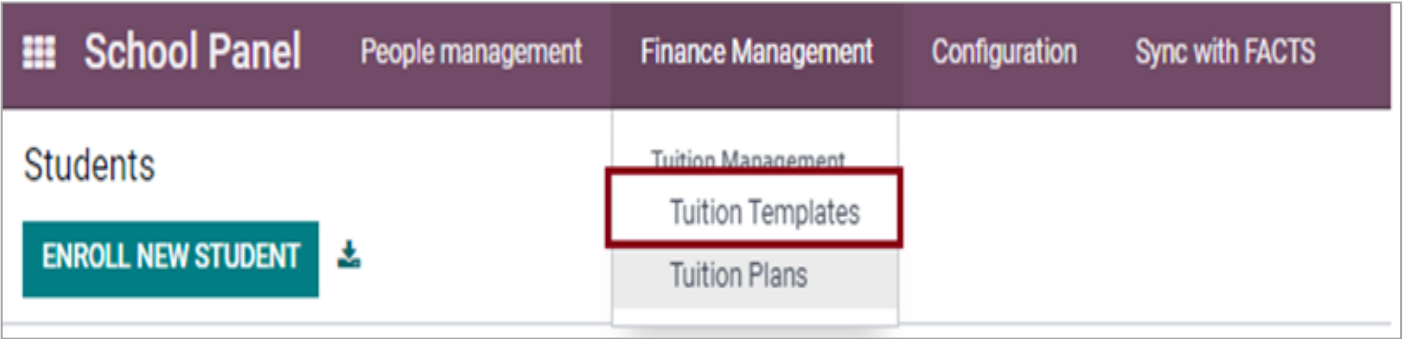
36. Let's say we are already on the current year (After progression). Go to "Tuition Templates".

Grades 1-3

NEW TUITION PLAN

CONFIGURATION

Paid   100$

Income   Due
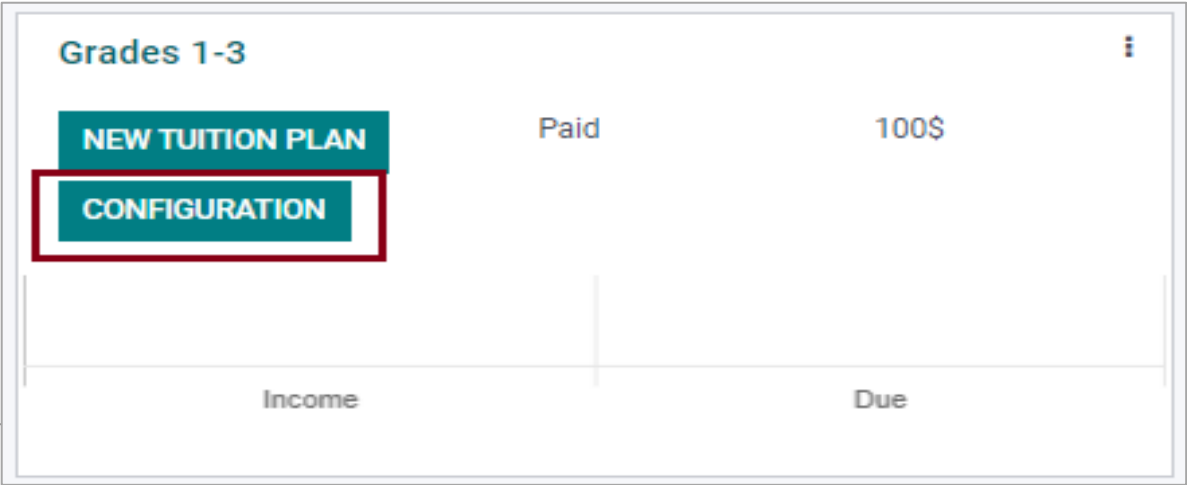
37. Go to configuration.

Name
Grades 1-3

Program
Default journal   Customer Invoices
Payment terms   Immediate Payment

Pricelist Option   Fixed prices

| Lines | Installments | Discounts | Recurring options |

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 Enroll states ❯ N ➜ ↻ 17 RECORD(S) EDIT DOMAIN	10,00	480,00 €	Customer I ▾		0,00	4.800,00 € 🗑

38. Edit the domain.

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

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

Name

Grades 1-3

		Pricelist Option	Fixed prices	▼
Program	▼ ☑			
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	(Septe... ✖) (October ✖) (Novem... ✖) (Decem... ✖) (January ✖) (Februa... ✖) (March ✖) (April ✖) (May ✖) (June ✖)	700000 Sa ▾ ☑	(G1 ✖) (G2 ✖) (G3 ✖)	Match all records ➜ ↻ 83 RECORD(S) [EDIT DOMAIN]	10,00	480,00 €	Customer I ▾ ☑	‒	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'.
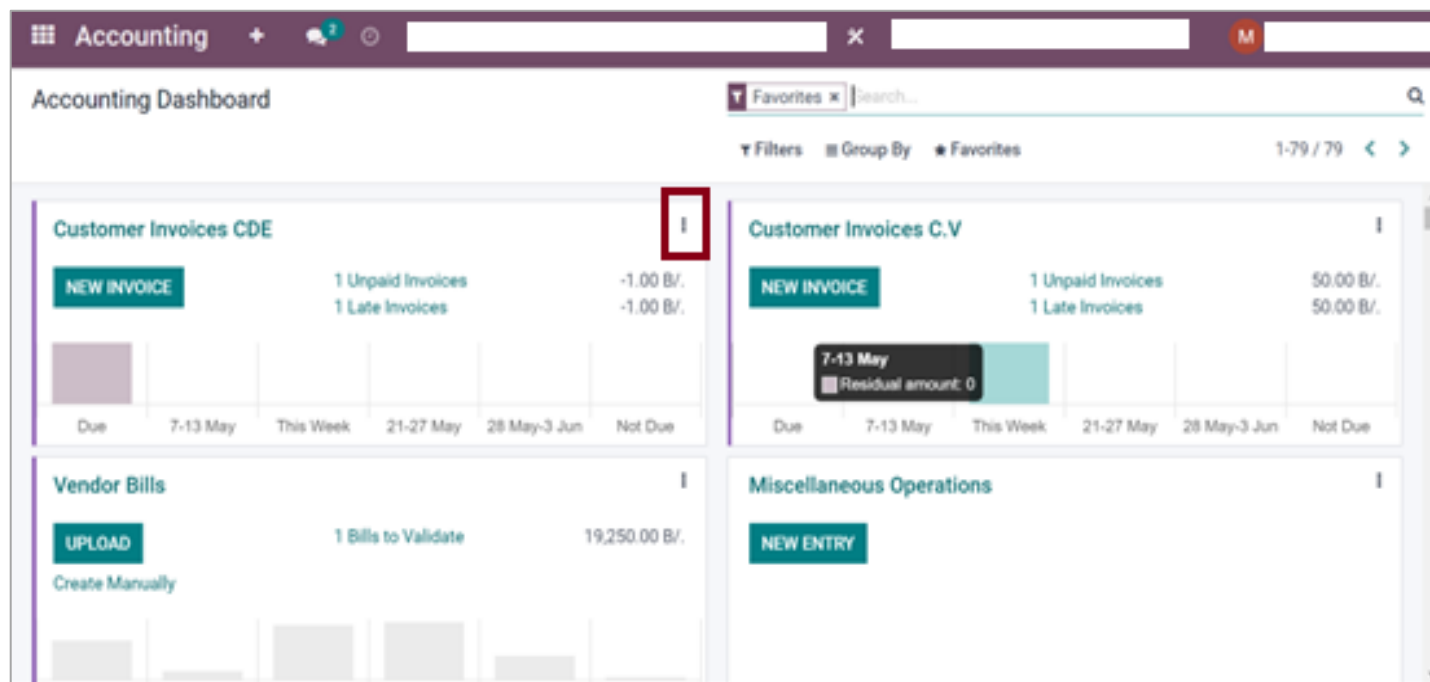
2. This screen will be displayed on the dashboard. Tap on the three dots at the top right corner to access the credit note option.
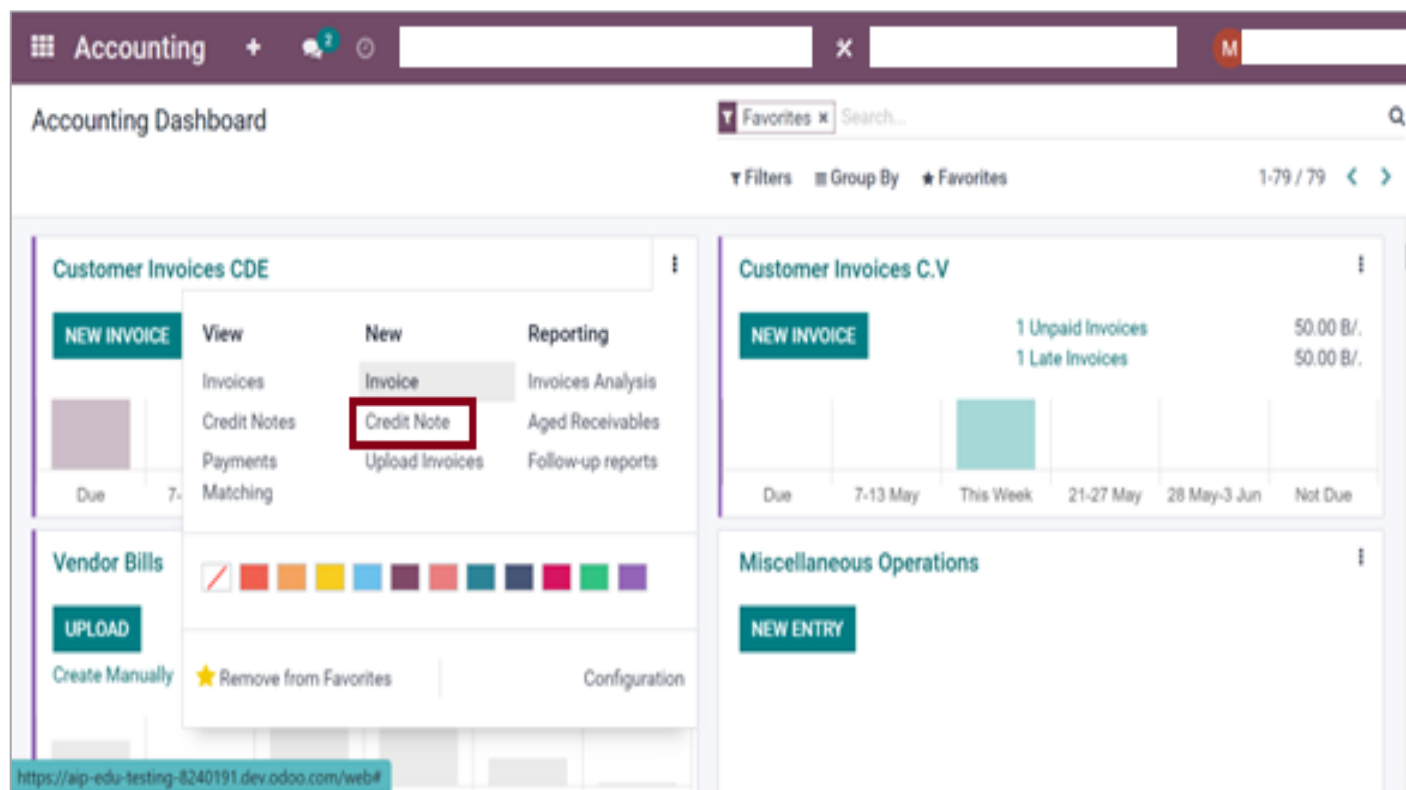
3. By tapping on the three dots, the screen or menu for that journal will be displayed. Select 'New Credit Note' from the options.

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

5. You fill out the data and confirm it.

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 ×

Account

EDIT

SEND

Journal ▾ Amount 225.00 B/. PAB ▾

Recipient Bank ▾ Payment Date 05/17/2023 ▾
Account

Memo CBWCV/2023/00578

STED

CREATE PAYMENT CANCEL

Customer		Invoice Date	05/17/2023
	– 8-707-567	Accounting Date	05/17/2023
Payment Reference	CBWCV/2023/00578	Due Date	05/17/2023
Students		Journal	Customer Invoices CDE in PAB
Family		Late Fee Rule	
Grade Level			
Program			
School			

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

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.

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

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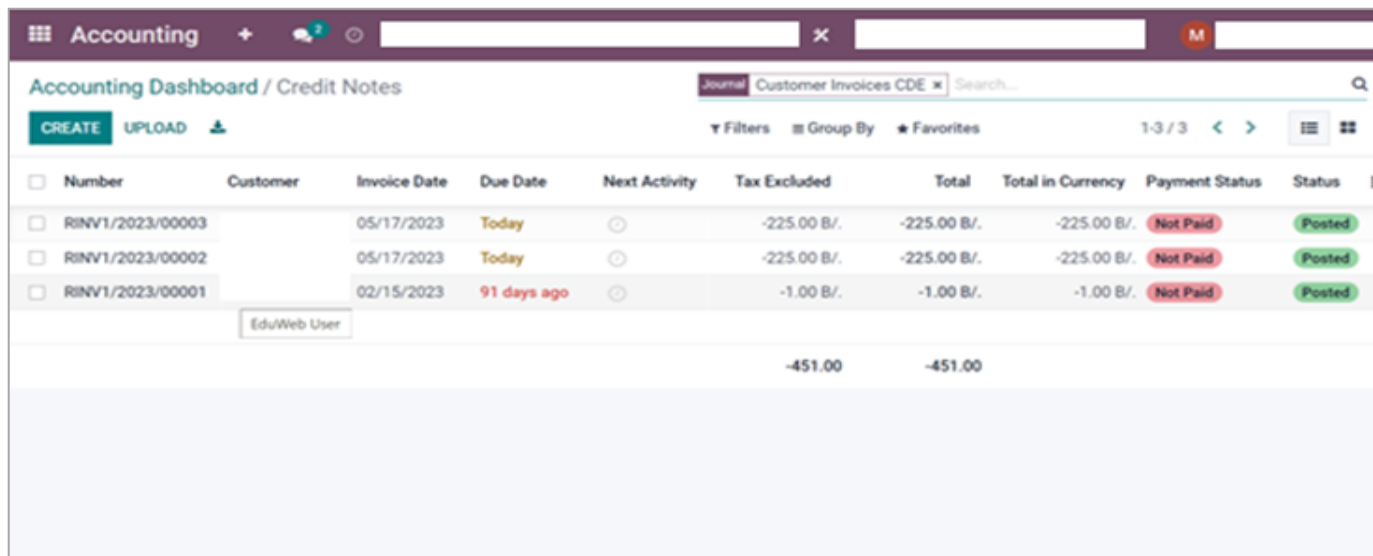
13. It will list all the credit notes that have been created.

Number	Customer	Invoice Date	Due Date	Next Activity	Tax Excluded	Total	Total in Currency	Payment Status	Status
RINV1/2023/00003		05/17/2023			-225.00 B/.	-225.00 B/.	-225.00 B/.	In Payment	Posted
RINV1/2023/00002		05/17/2023			-225.00 B/.	-225.00 B/.	-225.00 B/.	In Payment	Posted
RVBWCE/2023/00001		05/17/2023	Today		-700.00 B/.	-700.00 B/.	-700.00 B/.	Not Paid	Posted
RWAVCE/2023/00003		04/27/2023			-37.87 B/.	-37.87 B/.	-37.87 B/.	In Payment	Posted
RWAVCE/2023/00002		04/26/2023			-217.03 B/.	-217.03 B/.	-217.03 B/.	In Payment	Posted
RWAVCE/2023/00001		04/26/2023	21 days ago		-325.95 B/.	-325.95 B/.	-217.03 B/. 5 B/.	Not Paid	Posted
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			

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."

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.

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

Credit Note   ✕

Reason   Estudiante retirado   Use Specific Journal   Monedero Vario CE   ▼ ⬈

Reversal Date   ⦿ Specific   Refund Date   05/17/2023   ▼
                ○ Journal Entry Date

REVERSE   CANCEL

Costa Del Este, Ocean Ii 55   Due Date   05/10/2023
                                    Journal   Monedero Vario CE   in   PAB
Payment Reference   VBWCE/2023/00485   Late Fee Rule
Students
Family
Grade Level

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.

▦ **Accounting**   +   💬²   ⏱

Accounting Dashboard / Invoices / VBWCE/2023/00485
/ Draft Credit Note RVBWCE/2023/00001 (Reversal of: VB...

EDIT CREATE   🖨 Print   ⚙ Action   1 / 1   ‹ ›

CONFIRM   PREVIEW   CANCEL   GENERATE LATE FEE   DRAFT   POSTED

Customer Credit Note

RVBWCE/2023/00001

Customer   Invoice Date   05/17/2023
                Costa Del Este, Ocean Ii 55   Due Date   05/17/2023
                Panamá   Journal   Monedero Vario CE   in   PAB
                Panama
Payment Reference   Late Fee Rule
Students
Family
Grade Level

5. The reversal credit note is created.

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

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 | + | 💬² | ⏱ | | | ✕ | | | M | |

Receivable Ledger

Posted ✕ | Family ✕ | Student contains "mirones" ✕ | Search...

CREATE ⬇

▼ Filters | ☰ Group By | ★ Favorites

1-2 / 2 < >

	Date	Journal Entry	Account	Cc Pa Fa Student	La Du	Debit	Credit	Balance	Match
						15,236.99	12,886.99	2,350.00	
☐	05/17/2023	CVBWC/2023/05/0001 (Reversal of: VBWCE/2023/00485, E...	11023-1 Cue...		C. 0..	700.00	0.00	700.00	
☐	05/10/2023	COPCE/2023/05/0218 (VBWCE/2023/00485)	11023-1 Cue...		C. 0..	0.00	700.00	-700.00	
☐	05/10/2023	COPCE/2023/05/0217 (VBWCE/2023/00484)	11023-1 Cue...		C. 0..	0.00	650.00	-650.00	
☐	05/01/2023		COPCE/2023/05/0217 (VBW		S. 0..	650.00	0.00	650.00	
☐	05/01/2023		11023-1 Cue...		S. 0..	700.00	0.00	700.00	
☐	04/17/2023		11023-1 Cue...		S. 0..	615.00	0.00	615.00	
☐	04/10/2023	COPCE/2023/04/0203 (CBWCE/2023/01146)	11023-1 Cue...		C. 0..	0.00	650.00	-650.00	
☐	04/10/2023	COPCE/2023/04/0202 (CBWCE/2023/01145)	11023-1 Cue...		C. 0..	0.00	650.00	-650.00	
☐	04/01/2023		11023-1 Cue...		S. 0..	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.

8Advanced Features: How to Register Payroll Deductions
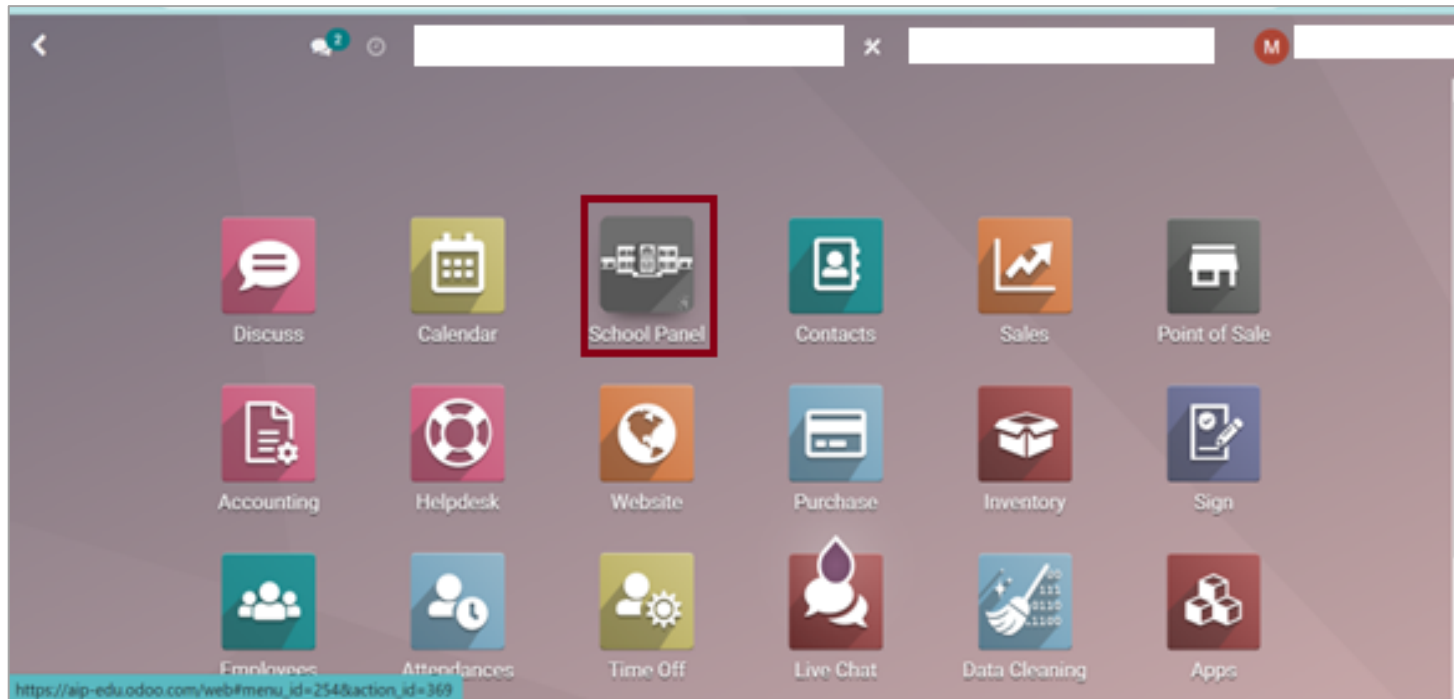
1. In the main menu, select the 'School Panel' module.

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.

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

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 + 2

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

EDIT   🖶 Print   ⚙ Action   1 / 1   ‹ ›

≡ 1 Invoice   ≡ Journal Entry

DPCV/2023/05/0012

Internal Transfer	☐
Payment Type	○ Send ○ Receive
Customer	.Wendy
Wallet	MATRÍCULA CV
Amount	150.00 B/. PAB
Date	05/18/2023
Memo	MBWCV/2023/00220

Journal	Deducción de Planilla CV
Company Bank Account	

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.

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.

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.

⊞ **Accounting**   ✚   💬² ◷   ✕   Ⓜ

Payments / DPCV/2023/05/0012 / Draft Entry (* 131433)
/ Draft Payment

EDIT   🖶 Print   ⚙ Action   1 / 1   ‹ ›

CONFIRM   CANCEL | Delete | DRAFT ▶ POSTED
                              | Send receipt by email |
                              | Create Invoice |
                              | Update Payment Lines | ☰ Journal Entry

Draft

Internal Transfer	☐	Journal	Deducción de Planilla CV
Payment Type	○ Send ⦿ Receive	Company Bank Account	
Customer	.Wendy		
Wallet	MATRÍCULA CV		
Amount	150.00 B/. PAB		

https://aip-edu.odoo.com/web#   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.

Accounting + 2/2 ‹ ›

Invoices / Draft Invoice MBWCV/2023/00219

EDIT CREATE   Print   Action   2/2 ‹ ›

CONFIRM PREVIEW CANCEL GENERATE LATE FEE APPLY LATE FEE   DRAFT POSTED

Customer Invoice

MBWCV/2023/00219

Customer	Wendy	Invoice Date	01/02/2023
	– 8807667	Due Date	01/02/2023
Payment Reference	MBWCV/2023/00219	Journal	Monedero Matricula CV in PAB
Students	Gabriela	Late Fee Rule	
Family			
Grade Level			
Program			
School			

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.

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.

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.

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.

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

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:
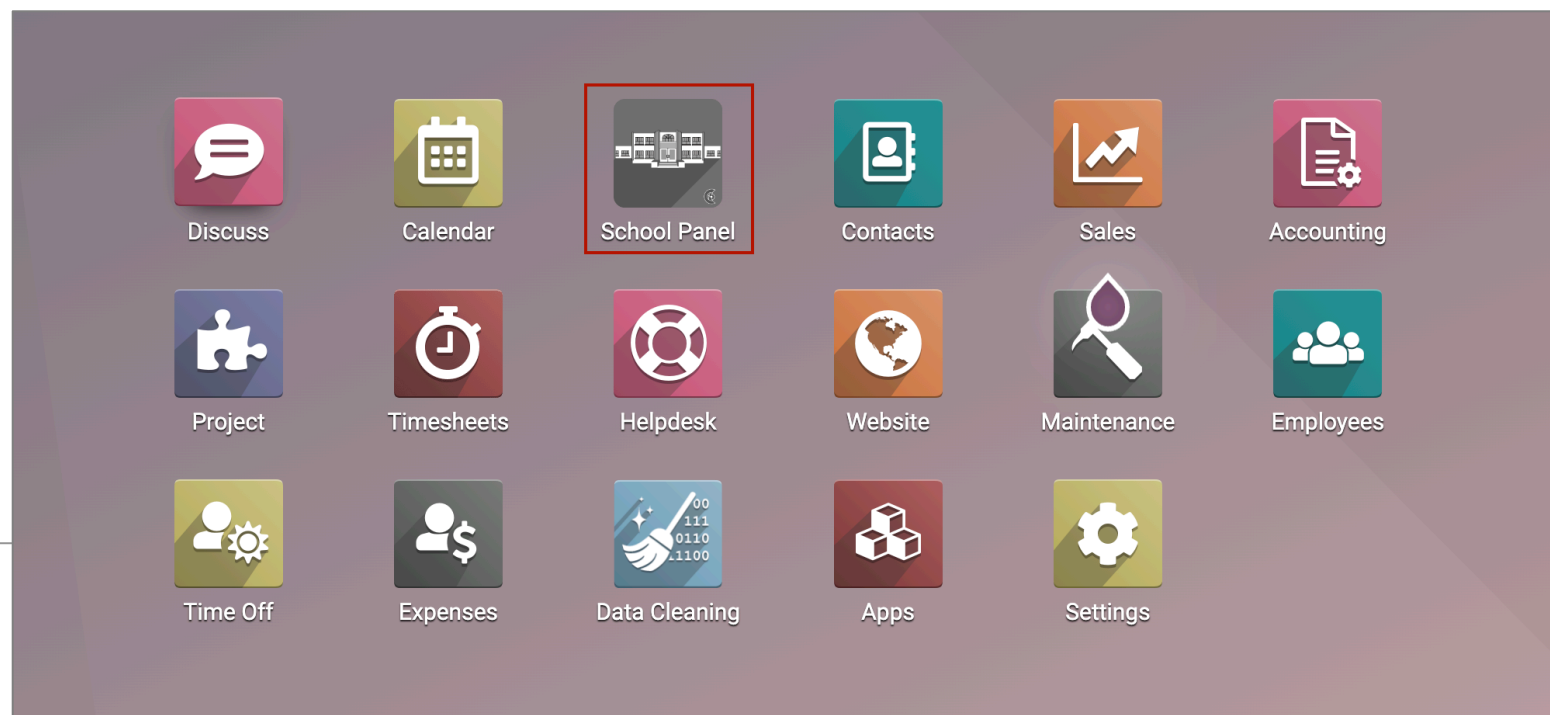
Start with navigating to the School Panel app.

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

Name Sorting Example

Last First, Middle

Allow editing contact name

☑ **Allow edit person name**
☑ **Allow edit student name**
☑ **Allow edit parent name**

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.

⚏ **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		🔴 EN	Program	▾
Capacity	0		School	
Next Program		▾	District	
Next Grade Level		▾		
Next Status		▾		

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

⠿ **School Panel**	People management	Finance Management	Reports	Configuration

Students
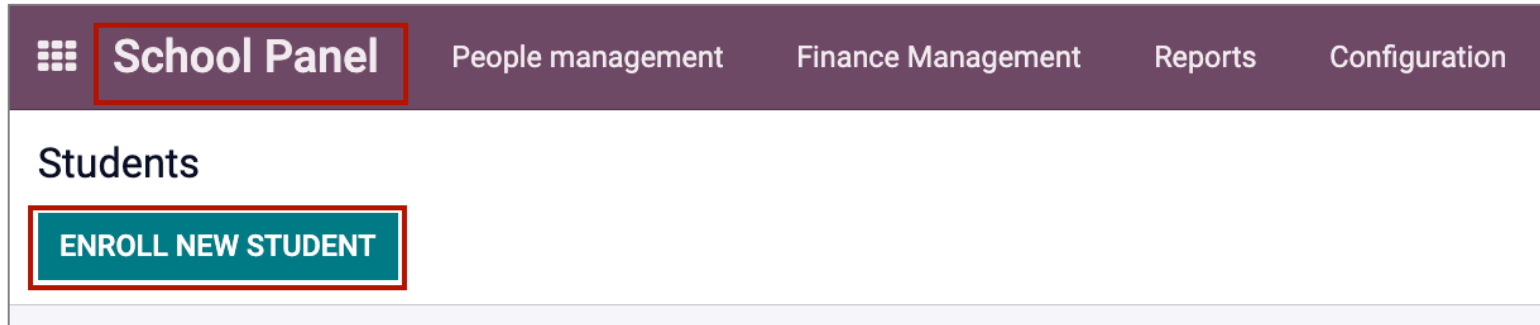
ENROLL NEW STUDENT

1. Click on School Panel

2. Click the Enroll New Student button

Student   ADD

NEXT

3. Click Add

Create Student   ✕

Sanders Allan, Peter

First Name	Allan		Email	
Middle Name	Peter		Phone	
Last Name	Sanders		Address	Street...
Gender	Male ▼ ⬈			Street 2...
Date of birth	04/01/2018 •••• ▼			City State ▼ ZIP
				Country ▼

Enrollment state

Curre...	Grade l...	Current ...	Current ...	Next pr...	Next gr...	Next st...	Next su...	Enrolled da...	Graduation...	Withdraw ...	Note	⋮
Standard	01	Admission		Standard	02	Enrolled		06/15/2023				🗑

Add a line

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.

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 2nd 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.

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	**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 |

Individual	Relationship type	Custody	Correspondence	Grade Related	Family Portal	Emergency contact	Invoice recipient	
Sanders Aris, Franco	Father	✓	✓	✓	✓	✓	✓	🗑
Sanders Edna, So ▾ 🔗	Mother ▾ 🔗	✓	✓	✓	✓	✓	☐	🗑

Add a line

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

Financial responsibilities

Family	Category	Percentag...	
Family of Sanders, Aris and Edna	All	100%	🗑

Add a line

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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.

---END---