



Service Management Guide

RTOManager features the capability of setting up services that you may offer to your students. It can be airport pick up service, accommodation or guardian service available to your overseas students, assistance with Visa Processing and other services which provides convenience to your prospective students.

Service management starts from the Service, facilities and provider setup in the system, to adding additional services



To manage this feature in your RTOManager, we need to first set up Service facility.

Service Setup

This feature is only available and managed by Super Administrator or college administrator. Follow the instructions below:

- On your RTOManager, click Admin > Service Set up.
- On the **Service Details** section, select the **Service Name** form the drop down menu e.g. *Accommodation* (as shown in the example below).





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Home View Doc Admin Staff Users C	Accommodation v	Offers	Student	Compliance	Communication	Marketing	CRM	Accounts	Reports					Updates
Service Setup Provider Setup Provider Facility	Accommodation Airport pickup Guardian Service Visa Processing	F	lomes	tay	▼									
Service Details	Add New Service	• /	Homes Add Ne	tay w Cate <u>o</u>	jory									
Facility Price Type: Per Week v Student Price: Add Facility													Astin Only Inc.	

Note: if the service you are after is not on the dropdown list, select Add New Service

Home	View Doc	Admin	Staff	Users	Courses	Timetable	Теа
Service S	Setup Provi	der Setup	Provide	Facility			
Service	ervice Fa	cility S	etup				
s	ervice Name:	Accommod	lation 🔻	ר			
Ca	tegory Name:	Accommod Airport pick	lation (up				
F	acility Name:	Guardian S	Service				
Facilit	ty Price Type:	Add New S	ssing Service				
s	Student Price:					*	
	(Add Facility					

- Select Category name e.g. Homestay, Room share etc. To add a new category, select Add new Category from the dropdown list.
- Enter Facility name on the field provided. e.g. Sydney Homestay
- Enter Student price per week e.g. \$250 (as shown on the example below).
- Click Add Facility to record information.

Convice Facility Seture	
Service Details	
Service Name: Accommodation V	
Category Name: Homestay	
Facility Name: Sydney Homestay	
Facility Price Type: Per Week 🔻	
Student Price: 250	
(Add Facility)	

 A confirmation message will appear to indicate facility information has been recorded successfully.

Facility is defined successfully





• List of service details will show up in a list (as shown below). You may be able to edit, modify, make inactive or delete the service as required.

Service Fac	cility Setup								
Service Details-									
Service Name:	Accommodation 🔻								
Category Name:	Homestay 🔻)							
Facility Name:	Sydney Homestay								
Facility Price Type:	Per Week 🔻								
Student Price:	:50								
	Add Facility)								
Facility is defined	successfully								
Samica Dataile									Active Only Inactive
Service Name	Date Type	Allow Student to choose provider	Internal Only	Category	Facility Name	Active	Price Type	Student Price	Action
Accommodation	Date Only		×.	Homestay	2016 House single	1	Per Week	250.00	/ 📝 🖨 🕄
Accommodation	Date Only		×.	Homestay	Sydney Homestay	1	Per Week	250.00	/ 📝 🖨 🛛
Airport pickup	Date Time		×.	Airport	Airport transfer	1	Per Service	100.00	/ 🛛 🔾 🕄
Guardian Service	Date Only		Ø	Guardian Service	Guardian Service	A	Per Service	200.00	/ 📝 🖨 🕄
Visa Processing	Date Only			Visa	Student Visa	ø	Per Service	1000.00	/ 🕅 🗢 🛛

Action icons and its corresponding functionalities



Allows you to **modify and update Service Category**. When you click on this icon, a pop up screen will appear to let you change the following information – Service Name, Category Name, Date type etc. **Note**

Date type means that either the service request can have date or can have date and time. Example for Airport pickup it is likely to have date and time, however for homestay arrangement it is likely to have start date and finish date.

You also have the **flexibility of allowing students to choose provider** for a particular service. You might have a few airport service provider who charges different rate, student may choose whom they will want to go with. Tick the box if you want to activate this feature.

Internal only indicates that the service chosen is provided by College itself and there is no third party provider involved.

Update So	ervice Cate	gory
Service Name:	Accommodation]
Category Name:	Homestay	Date Only
Date Type:	Date Only V	Date Time
	Allow student to choo	ose provider for this service
	Internal Only	
	Update Service	J





Once changes has been entered, click **Update Service**. A confirmation message will appear to confirm successful update



Allows you to modify facility information which includes change in facility name and the Student Price. When you click on this icon, a pop up screen will appear to allow you to make the necessary changes. Once update has been made, click **Update Facility** to record the change (as shown below).

Update F	acility
Facility Name:	2016 House single
Student Price:	250.00
	Update Facility

Once changes has been entered, click Update Facility. A confirmation message will appear to

essfully

confirm successful undate	_	Facility	is	updated	suco



Allows you to set the facility to inactive status. This happens when the particular service if you are in the process of renewing a contract with the service provider etc. Once you click this icon, the service will automatically go to the **inactive only** list.

Service Details									
Service Name	Date Type	Allow Student to choose provider	Internal Only	Category	Facility Name	Active	Price Type	Student Price	Action
Accommodation	Date Only		1	Homestay	2016 House single	V	Per Week	250.00	∕ ⊽⊖⊗

Once this service is readily available, you may click the green icon from the inactive list to activate the service again.

Service Details									
Service Name	Date Type	Allow Student to choose provider	Internal Only	Category	Facility Name	Active	Price Type	Student Price	Action
Accommodation	Date Only		Ø.	Homestay	Sydney Homestay		Per Week	250.00	/ 🛛 📀 🛛

Allow	s you to	delete your selected se	ervice deta	ails off the s	ervice list.				
Service Name	Date Type	Allow Student to choose provider	Internal Only	Category	Facility Name	Active	Price Type	Student Price	Action
Accommodation	Date Only			Homestay	2016 House single	V	Per Week	250.00	/ 🛛 🖯





A confirmation message will appear to confirm deletion.

Provider Setup

RTOManager allows you to setup your Service provider information in the system. To manage this function, follow the instructions below:

• On your RTOManager, click Admin > Provider Setup



 Enter relevant information the fields provided. Make sure that all fields with asterisk are completed.

Service Provid	der Setup
-Provider Details-	
Provider Company Name:	Svdnev Homestav
Contact Name:	Test Service
Country:	Australia
	1 Bourke Road
Company Address	
Company Suburb:	
Company State:	
Postcode:	2015
Company Phone:	1300543512
Mobile:	0414777777
Company Fax:	0285027777
Email:	tba@tba.com.au
Website:	www.sydneyhomestay.com.au
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Other Details:																				
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	Ad	d Pro	ovide		eset D	Data														

• Click Add Provider to record provider information in the system. A confirmation message will appear to indicate successful update. The newly added provider's information will show up on the list.

Provider det	Provider details are recorded successfully														
View Provider List															
Search Provider	By: All Provid	er 🔻													
📰 Service Provide	r List														
Company Name	Contact	Address	Phone	Mobile	Fax	Email	Website	Comment	Internal	Other	Active	Action			
	Name								Comment	Details					
ABCY Group	Benny	12 Broadway Street BANKSTOWN NORTH NSW 2200 Australia	02 7654 3456			info@abcygroup.com.au					V	₹ ● 8			
airport line pty Itd	Gordan	34 Croydon Street ALTONA NORTH VIC 3025 Australia	02 7654 3451			info@airportline.com.au					1	7 🗢 8			
Websutra test	John Citizen	184 Bourke road, ALEXANDRIA NSW 2015 Australia	404312569	0404312569	404312569	sanketshres@gmail.com					V	₹ ● 8			
Sydney Homestay	Test Service	1 Bourke Road ALEXANDRIA NSW 2015 Australia	1300543512	0414777777	0285027777	' tba@tba.com.au	www. sydneyhomestay.com.au				1	∦ ● 8			

Provider Facilities Setup

By this time, you have set up the provider information and the facilities or services that you offer to students in your college. Now, we need to 'assign' the Services to their respective Service provider.

To manage this function, follow the instructions below:

• On your RTOManager, click Admin > Provider Facility



• Select Service Provider, Service name and Service Category from the drop down list. As for the example below, we have selected Sydney Homestay Pty Ltd who provides Accommodation service under Homestay category.

Provider F	acilities Setup
Facility Details	
Service Provider:	Sydney Homestay Pty Ltd.
Service Name:	Accommodation 🔻
Service Category:	Homestay 🔻

• For **Available Facility**, click the relevant Facility of which your selected service provider offers. In the example below, *Sydney Homestay* offers *Room sharing at \$250/week for student price. Provider price will be \$200/week.*

cility Details					
Service Provider: Service Name: Service Category:	Sydney Homestay Pty Accommodation • Homestay •	y Ltd. V			
Available Facility:	Facility Name	Provider Price	Std Price	GST Inc.	Comment
$\overline{}$	2016 House single	250.00	250.00	🔍 Yes 🖲 No	
×	Room Sharing	200	250.00	○ Yes ● No	

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 Click Add Facility to save updates. A confirmation message will appear to indicate successful update/change. The newly added information will show up at the bottom of the page as shown below:

Price is set su	uccessfully								
📑 Provider Facility i	List							Active Only	y [©] Inactive Only [©] ,
Service Name	Category Name	Faclity Name	Active	Provider Price	Std Price	GST Inc.	Comment		Action
Accommodation	Homestay	Room Sharing Room Sharing	1	250.00	250.00	○ Yes ● No			200

After we have set up the Services, facilities and provider setup, we will now look into how this function will be utilised in the Student management and Finance section.

Case study:

Using our sample student *Manna training, Student no 20170013*, currently enrolled in your College. She needs a place to stay and has found out that your college is offering student accommodation.

Based on her requirements, she has chosen Room sharing accommodation offered by provider Sydney Homestay Pty Ltd. The weekly student rate is **\$250/week**. Expected duration of stay is from 2/07/2017 to 31/12/2017. She is happy to pay the amount upfront.

 To add this service, your admin or student services officer will need to go to the student's profile (Student > Student profile summary > profile).



 On the student profile, scroll down and Go to Additional Service Request section and click edit icon





Home	View Doc	Admin	Staff Use	rs Courses	Timetable	Teacher	Offers	Student	Compliance	Communication	Marketing	CRM	Accounts	Reports		
Vi	ew detai	Is of Ms I	Manna T	raining												Back
Student A	ddress Details-															
✓ Mai Typ Addres	ling/Residential be: Current Stre ss: Bourke Road ALEXANDRI Australia,201	contact address aret Address a/Bourke Road 12 IA NSW 15	2 Phone/Work	Phone: 414234234 Fax: Mobile: 041423423	4/414234234 34											
Action	Qualification H Qualification L Bachelor Degr	evel ee or Higher Deg	ree Level	Name of Qua	lification^	School/Institu	ition	State/Cour	try	Year Completed	•					
Action	Employer	0 • (ocupation	Start * 26/0	t Date 6/2017	Finish Da	te 7	Duties								
Emergen	cy/Guardian con	tact details:														
Action	Contact Typ	96	C	ontact Name		Relation	ship		Address	and Alexandria MOM 20		Phone			Email	
ō		,	*	Shirt Shirth	*			*			10	01430430		*		
-Additiona	I Service Reque Offer ID: 1371	st		1												¢
Servic	e Request: 🔔	No service data	found													
	OSHC: Not F Disability: No Ho	Requested w did you first he Please provide	ar about us? (Le e more details (K	ad Source): Websi (now From): friend	te											Go To Top

• Select the Service required from the dropdown list. As per our example, student is requesting for accommodation service.

Edit Additional Serv	vice Request (Offer ID: 13	371)
Service Request—		
Additional Ser	vice Request	
Select Service:	Select Service 🔻	
	Select Service	
🛕 No service d	Accommodation	
i	Airport pickup	
Overseas Stud	Visa Processing	
Overseas stud	visa Flocessing	





- Select Service category e.g. Homestay, Apartment, Boarding house
- Select **Facility** and **service provider**. In this example, we have chosen *Room sharing facility* with selected provider *Sydney Homestay Pty Ltd*.

Edit Additional Operation Research (Office ID: 4074.)			
Edit Additional Service Request (Offer ID: 1371)			
Service Request-			
Additional Service Request			,
Select Service:	Accommodation V	Homestay	
Service Category:	Homestay 🔹	Boarding House	
Select Facility:	Room Sharing 🔹 🗸	2016 H	baring ▼ ouse single
Service Provider:	Sydney Homestay Pty Ltd.		Sydney Homestay Pty Ltd.
Student Price:	\$250.00	Per Week	Sydney Homestay Pty Ltd. No provider is Assigned
Provider Price:	\$200.00	Per Week	
Starts From:	30/06/2017		
Ends On:	31/12/2017 Cal	culate Total Price	
Student Total Charged:	\$6571.43		
Total Provider Price To Be Paid:	\$5257.14		
Allergies/Special Requirements (Dietary etc.):_		1	
	Add Service		
•			

- Enter the requested duration of service e.g. 30/06/2017 to 31/012/2017.
- Click the link **Calculate Total Price** to calculate Student total charged and total provider **Price** to be paid.
- Specify Allergies/ Special requirements (Dietary etc.) on the field provided (if any).
- Click add service. The service will be added to the list of service requests as shown below.
- You may update and delete this service information by clicking these action icons





-Service Request-						
Additional Service Request						
Select Service:	Accommodation V					
Service Category:	Homestay V					
Select Facility:	Room Sharing V					
Service Provider:	Sydney Homestay Pty Ltd. 🔻					
Student Price:	\$250.00 Per Week					
Provider Price:	\$200.00 Per Week					
Starts From:	30/06/2017					
Ends On:	31/12/2017 Calculate Total	Price				
Student Total Charged:	\$6571.43					
Total Provider Price To Be Paid:	\$5257.14					
Allergies/Special Requirements (Dietary etc.):						▲
	Add Service					
Service Name Category Nam	ne Facility Name	Provider Name	Service Start	Service End	StdPrice	Comment Action
Accommodation Homestay	Room Sharing	Sydney Homestay Pty Ltd.	30/06/2017 12:00 AM	31/12/2017 12:00 AM	\$6,571.43	2 🛛

Service Provider Allocation

This menu allows you to allocate Services to providers in **bulk**. RTOManager is designed to allow you to record and manage different services you provide to your students.

In order to use this feature effectively, you have to set up your providers information and the service they provide via **Admin > Service Setup.**

To generate the list, follow the instructions below:

R	r o mai	nagei									Logged I	n As AA Traii	ner (trai	ner) 🔒 Lo	gout 🔁 i	lelp Sa	dmin	• /	All Campu	JS	7
CR	icos																			🕡 U	pdates
Home	View Doc	Admin	Staff	Users	Courses	Timetable	Teacher	Offers	Student	Compliance	Communication	Marketing	CRM	Accounts	Reports						
Edit Profile	Change	Password	Evaluati	on Leav	e Info					Attendance Mar	nagement										
										Academic Prog	ress										
										Intervention											
	Manage P	rofile		Documen	its	Mate	rials			Group Manager	ment										
	Edit Your Pri	file	-	Manage Doo	cuments	Manag Materi	ge Course als			Bulk Update	D	ate 🔹 Des	cending	•							
										Generate Bulk	Certificate ^{IV}	ailable									
	Class Enr	ol		Reports		AVE"	TMISS			Manage Orienta	ation										
	Activate Onl Class Enrolr	ne ient		View & Gen Reports	erate	AVETI Export	VISS Data			Validate PRISM	ai IS	te 🔻 Desce	ending •								
										Service Reques	st Allocation	•									
500	VSN			NVR			(WA)			Traincoshin Vis	ite										
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Manage VSI VSR service	l with		View NVR re Export	eport &	View 1 report	FAC CQR for WA state			Manage Online	Test										
	To Do Lis		В	ackup		VET	FEE HELP			Dentinue	David	T 1 07 1	0047		6	and Davi					
2	Add new tas	c	Da Da	ita Backup		VFH n	eporting			Z:00 A	Day	Tuesday, 27 Ju	ne 2017		U.	lext Day					
										8:00 A	M							N	O IMA		
-	HEIMS Se	tup		USI			HelpDesk			9:00 A	м								ADVER		
	HigherEd rep	orting	USI	Verify / Revi	ew / erate USI		Download HowTo			<u>10:00 A</u>	MA								160 X 6		
										12:00 0											
	HelpDesk									1:00 P	M										
	Log a ticket									2:00 P	M										
										<u>3:00 P</u>	M										

• On your RTOManager, click **Compliance > Service Request Allocation.** 

• On the Service Provider Allocation stage, Select the **Service Name** e.g. *Accommodation, airport pickup, visa processing etc.* 





		1005															🕐 Upda
н	ome	View Doc	Admin	Staff	Users	Courses	Timetable	Teacher	Offers	Student	Compliance	Communication	Marketing	CRM	Accounts	Reports	
•	Sei	vice Pro	ovider	Alloca	tion												Export Extel
6	earch S	ervice Reque	s														
				Se	rvice Name	Accommo	dation 💌										
				Service	Start From	: 01/06/2017											
				Serv	ice Start To	: 30/06/2017											
	Studen	t First Name /	Last Name	/ Student II	D / Offer ID	:	_										
					L	Search List	9										 

• Select Service dates started between two dates e.g. 01/06/2017 to 30/06/2017.

Note that these dates marked all those services that started within the dates mentioned.

Click Search List button to generate the Service request list (as shown below).

•	Service Provid	der Al	location											Export Excel	Update Calculate
	Search Service Request-														1
	Student First Name / Last	Name / St	Service Name Service Start From Service Start To udent ID / Offer ID	Accommodation     Accommodation     Introductor     Search List	)								Filter Data By Order by: Stude	Mth Start Date	e Assigned V Ascending V
	Service Request														
	Stage StudentID	Offer Id	Student Name	Couse List	Category Name	Facility Name	Service Start	 Service Finish	Provider	Std Pri	e Provide	r Price	Comment	Invoice No	Update Status
	Student 20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	Room Sharing	30/06/2017	31/12/2017	Sydney Homestay Pty Ltd. 🔻 🔍	6571.4	5257.14	+ No GST		1539	A
	Student 20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	Room Sharing	30/06/2017	31/07/2017	Sydney Homestay Pty Ltd. 🔻 🔍	1108.0	886.00	+ No GST			9
6	Student 20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	2016 House single	30/06/2017	30/07/2017	No Provider Assigned V	1071.4	0.00	+ No GST		1540	9
	Student CRM20160018	1318	Gerry Smith	BIT(Current Student)	Apartment	private Room	26/06/2017	09/07/2017	Sydney Homestay Pty Ltd. 🔻 🛈	557.14	464.29	+ No GST		1538	9
6	Student CRM20160018	1318	Gerry Smith	BIT(Current Student)	Homestay	2016 House single	26/06/2017	09/07/2017	No Provider Assigned V	464.29	0.00	+ No GST		1538	9
E	Student VFH20150018	1368	VFH Test	BSB40212(Current Student)	Homestay	2016 House single	20/06/2017	08/07/2017	No Provider Assigned V	642.86	0.00	+ No GST		1541	9

• Tick the box of all services provided by the same provider and click Update icon located on the top right hand side of the page. The update the status will change to green icon icon the update.

	Service Re	equest														
	Stage	StudentID	Offer	Student	Couse List	Category	Facility Name	Service Start	Service Finish	Provider	Std Price	<b>Provider Price</b>	Comment		Invoice	Update
			ld	Name		Name									No	Status
	Student	20170013	1371	Manna	BSB50615(Current	Homestay	Room Sharing	30/06/2017	31/12/2017	Sydney Homestay Pty Ltd. 🔻	6571.43	5257.14 + No			1539	<b>S</b>
				Training	Student)					0		GST				
•	Student	20170013	1371	Manna	BSB50615(Current	Homestay	Room Sharing	30/06/2017	31/07/2017	Sydney Homestay Pty Ltd. 🔻	1108.00	886.00 + No		)		0
				Training	Student)					0		GST				
	Student	20170013	1371	Manna	BSB50615(Current	Homestay	2016 House	30/06/2017	30/07/2017	No Provider Assigned 🔻	1071.43	0.00 + No			1540	9
				Training	Student)		single					GST				
	Student	CRM20160018	1318	Gerry Smith	BIT(Current Student)	Apartment	private Room	26/06/2017	09/07/2017	Sydney Homestay Pty Ltd. 🔻	557.14	464.29 + No			1538	ø
										0		GST				
	Student	CRM20160018	1318	Gerry Smith	BIT(Current Student)	Homestay	2016 House	26/06/2017	09/07/2017	No Provider Assigned V	464.29	0.00 + No			1538	9
							single					GST				

• The list can also be exported in an Excel format by clicking the Excel export icon is located on the right hand side of the page.





You may also notice that some service requests do not have a corresponding provider. E.g. No
Provider assigned. To assign a new provider, you can update the service information by going
back to Students' additional service request and assign the provider and services accordingly
(Student > Profile > Additional Service Request)

Π	Service Re	equest													
	Stage	StudentID	Offer	Student	Couse List	Category	Facility Name	Service Start	Service Finish	Provider	Std Price	Provider Price	Comment	Invoice	Update
			ld	Name		Name								No	Status
	Student	20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	Room Sharing	30/06/2017	31/12/2017	Sydney Homestay Pty Ltd. •	6571.43	5257.14 + No GST		1539	0
	Student	20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	Room Sharing	30/06/2017	31/07/2017	Sydney Homestay Pty Ltd. •	1107.14	885.71 + No GST			0
	Student	20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	2016 House single	30/06/2017	30/07/2017	No Provider Assigned 🔻	0	0 + No GST		1540	0
	Student	CRM20160018	1318	Gerry Smith	BIT(Current Student)	Apartment	private Room	26/06/2017	09/07/2017	Sydney Homestay Pty Ltd.	557.14	464.29 + No GST		1538	0
0	Student	CRM20160018	1318	Gerry Smith	BIT(Current Student)	Homestay	2016 House single	26/06/2017	09/07/2017	No Provider Assigned V	0	0 + No GST		1538	•
	Student	VFH20150018	1368	VFH Test	BSB40212(Current Student)	Homestay	2016 House single	20/06/2017	08/07/2017	No Provider Assigned V	0	0 + No GST		1541	9

To assign a new provider, you can update the service information by going back to Students' additional service request and assign the provider and services accordingly (Student > Profile > Additional Service Request)

Note  $\rightarrow$  The service allocation feature allows to view the list of services that are yet to be allocated to the provider and then link to the provider and also this will then make it ready to create the invoice in the Finance section.

#### **Student Payment Management**

Once additional service has been added to the students' profile, accounts team may now raise an invoice and collect payment from the student. Note that first the invoices for the service is added and then as the payment is made then it is recorded against the invoice.

To manage this function, accounts team will need to follow the instructions below:

- On your RTOManager, click Accounts > Student Payment > Student Payment Homepage.
- Enter Student number and click **Search** e.g. student number 20170013



•



RTOMANAGER CRICOS Home View Doc Accounts Reports			I	_ogged In As	AA Trainer (traine	r)   🔒 Logout	🖶 Help 🥻
Student Payment Agent Payment Staff Timesheet Ba	nk Reconciliation   Accounts Set-Up	Generate Invoice	Employer Invoice   Pr	ovider Payment	Account Integration	Import Transactic	n
You can view all the students under your management to     Search by: [d/FirstName/LastName ▼     Search: 20170013     [d/FirstName/LastName     Student ID     First Name     Last Name     Date of Birth     Courted	y searching the particular criteria by s	search function below	<b>w</b> .				
Status Agent						Copyri	ght © 2007 - 2(
Course Stati Date Course Finish Date COE No Offer No Email Invoice No Receipt No							

On the Student Payment Summary page, click miscellaneous payment.

Home View Doc Accounts	Reports		Update
Student Payment   Agent Payme	nt   Staff Timesheet   Bank Reconciliation   Accounts Set-Up   Generate Invoice   Employer Invoice   Provider Payment   Account Integration	Import Transaction	
Student Payment	Summary Page	Create Combine SO	Invoice Sanction
Student & Course Info			☆ Student Payment
Student ID: 2	20170013 Student name: Ms Manna Training		+ Student Payment Home
Courses enrolled:	BSB50615 : Diploma of Human Resources Management-04/04/2017 - Current Student 🔻		- Summary
Campus Name:	Sydney Campus		+ Initial Payment
Agent Name:	Test Agent Pty Ltd		+ Miscellaneous Payment
Course Duration: 4	V04/2017 - 21/08/2017 Status: Current Student		
Total Course Fee: /	U\$ 2500.00 Total Fee Paid: AU\$ 500.00		+ Agent Commission
Total Course Fee Balance Due: /	US 2000.00 Course Miscellaneous Fee Due: AUS 950.00		+ Refund History
Invoiced Due Amount: /	AU\$ 2000.00 Total Miscellaneous Fee Due: AU\$ 950.00		+ Transfer Payment
Iotal Fee Refunded: A			+ Student Scholarship
			+ Agent Advanced Payment

• On the Miscellaneous Payment page, click **Add icon** it to add new Payment. Note that we will now generate an invoice for our sample student's Accommodation service.





Home View Doc Accounts Reports	
Student Payment   Agent Payment   Staff Timesheet   Bank Reconciliation   Accounts Set-Up   Generate Invoice   Employer Invoice   Provider Payment   Account Integration   Import Transaction	
Miscellaneous Payment	Ad Process Delete Back
-Student Information & Payment Details-	- Student Doument Llome
Student ID : 20170013	+ Student Payment Home
Student name: Ms Manna Training	+ summary
Total Miscellaneous Payment: 5328.39	+ Initial Payment
OSHC Payment: 500.00	<ul> <li>Miscellaneous Payment</li> </ul>
Payment Due: 950.00	+ Agent Commission
Accommodation	+ Refund History
Transaction Twee: Miscellaneous® Service Accommodation	+ Transfer Payment
Airport pickup     Airport pickup     Outperiod     Outperiod	+ Student Scholarship
Select Course: BSB50615 : Diploma of Human Resources Manage Visa Processing udent *	+ Agent Advanced Payment
Select Service: Accommodation	
Service Category: Homestay	
Select Facility: Room Sharing 🔻	
Service Provider: Sydney Homestay Pty Ltd. 🔻	
Starts From: 30/06/2017	
Ends On: 31/12/2017	
Payment Status: Normal (Paid)  Uue Date: (26/06/2017	
Receipt No: 1476 Link Existing Receipt	
Payment Date: 28/08/2017 Bank Deposit Date:	
Payment Mode: Credit Card V	
Bad Debt: 0	
Total Amount : (5571.43 AUS Invoice No: (1539 Link With Existing Invoice No:	
GST Included? GST Amount: AUS 0	
U Leaurt as Agent Recate	
Remarks:	
(Record)	
1 ²	

- On the Add/Update Transaction section of this page, enter the relevant transaction information
- Transaction Type e.g. Miscellaneous or Service (Service type is selected to record the details based on service requested during the application process)
- Selected Service e.g. Accommodation, airport pickup etc.
- Category e.g. Service category homestay, apartment etc.
- Facility e.g. Room sharing, bedspace etc.
- Service provider –

Third party providers your college is affiliated with i.e. Sydney Homestay Pty Ltd.

Start and end dates e.g. Service start and end date. System will automatically calculate the



price as per total amount.

- Payment Status e.g. Schedule (not paid), Normal (Paid)
- o Due Date
- o Receipt number (this number is auto generated unless you opt to use/link existing receipt)
- Payment Date (default is today's date)
- Payment Mode e.g. Cash, bank deposit, EFTPOS, cheque etc.

These options has been set up as part of the Service/Provider Setup





o Total Amount (system will automatically calculate total amount based from Service start

Starts From:         30/06/2017           Ends On:         31/12/2017				
Ends On: 31/12/2017 Calculate Price		Starts From:	30/06/2017	
and finish date)	and finish date)	Ends On:	31/12/2017	Calculate Price

 $\circ \quad \text{Invoice number} \text{ (this is generated automatically by the system unless you opt/use/link with}$ 

Existing invoice. Invoice No: 1535

• Type in **Remarks/comments** on the free text field provided.

- Click **Record** to save all information.
- Once information is recorded, confirmation message will appear to indicate successful recording

of information.

• Note that the recorded payment will appear on the miscellaneous payment record for the selected student. You may search for this record by using the search filter located on the top right hand side.

Mis	Miscellaneous payment record for student: 20170013									
Invid	Invoice No	Invoice Sent	Trans Type	Transaction Details			A All			
274	1539		Service	Type: Room Sharing(Course : BSB50615 - Attempt : 1) Info :: Paid On: 26/06/2017 (Receipt: 1476) By Credit Card Remarks: ; Last updated by: trainer @ 26/06/2017	Amount: \$6571.43( No GST) Refund: \$0	Due Date: 26/06/2017 Reversed: No	\$ 2 \$ E E 应 V			
loons D	escription:   🦣 R   😈 R	efund Transaction	Modify Transac	tion   🛅 Generate student receipt   😵 Delete transaction						

Mis	cellaneous paym	ent record for stude	mt: 20170013	1			Search By: Service <b>v</b> All <b>v</b>
Invid	Invoice No	Invoice Sent	Trans Type	Transaction Details			Action
274	1539		Service	Type: Room Sharing(Course : BSB50615 - Attempt : 1)	Amount: \$6571.43( No GST)	Due Date: 26/06/2017	\$ 😵 \$ 🗄 🖹 🗁 🖸
				Info :: Paid On: 26/06/2017 (Receipt: 1476) By Credit Card	Refund: \$0	Reversed: No	-
				Remarks: ; Last updated by: trainer @ 26/06/2017			
lcons D	escription:   🦣 R	efund Transaction	🐓 Modify Transa	ction   🖺 Generate student receipt   😵 Delete transaction			
	l <mark>G</mark> B	everse Transaction	Revert Back to	Normal Transaction			

**Note:** It is important to highlight that this payment can be manage further using the **action icons** available on the right hand side.

Please see below functions of each action icons available.

|--|





	Allows you to refund the payment (if required).
	Students may request payment refunds based on different reasons As per our example, student has found a new accommodation and is requesting for a refund. You can facilitate this function this by clicking the refund icon . You can indicate any administration costs and deduct it from the refund amount. You may also select <b>refund schedule date</b> , <b>refund mode</b> and add a few comments as shown below.
	Transaction Refund
	Payment No. 274
da.	Payment type Room Sharing
¢.	Amount paid AU\$6571.43
	Administration Cost 100 AU\$
	Refund amount 6471.43AU\$
	Refund schedule date 26/06/2017
	Refund date 26/06/2017
	Refund mode Cash V
	Student has found another accommodation and is asking for refund.
	Comment:
	Update Refund Info)
8	Allows you delete the transaction. When you click this icon, a pop up screen will appear to confirm reason for deletion. Click <b>Confirm Delete</b> to delete.





	Delete Confirmation
	Transaction No. 274 Receipt No: 1476
	Payment amount: 6571.43 Due Date: 26/06/2017
	GST: 0.00 Date of payment: 26/06/2017
	Payment mode: Credit Card Payment type: Room Sharing
	Remarks:
	Reason To Delete: no longer required
	Confirm Delete
in se N	voice, click this icon. it will go back to your Add/Update Transaction ection and you may change the payment status from <b>schedule not paid</b> to <b>ormal Paid</b> and click <b>Update Info</b>
	Transaction Type: Miscellaneous® Service
	Select Course: B850615 : Diploma of Human Resources Management-04/04/2017 - Current Student V
	Select Service: Accommodation V Service Category: Homestay V
	Select Facility: Room Sharing   Service Provider: Sydney Homestay Pty Ltd.   Schedule (Not Paid)
	Starts From: (02/07/2017 Calculate Price Schedule (Not Paid)
Ċ,	Payment status     Schedule (Not Pail)       Total Amount:     250.00       AU\$     Invoice No:       1535     Link With Existing Invoice
	GST Included? GST Amount: AUS 0.00 Accommodation paid monthly
	Remarks:





	Allows you to send the invoice and/or receipt via email.
	Send Email to Student
	Send from:       Me : manna.manlago@meshedgroup.com.au         Student nam:       Manna.manlago@meshedgroup.com.au         CC:       Protoe multiple emails apparated by comma (email.email)         Select Template:       Select Template         Subject:
	Email Text
	Allows you to reverse the transaction (as required). When you click this icon, system will ask for comment/reason for payment reversal.
U	Please be noted that you may not have access to make this transaction back to normal Accommodation no longer required. Student is requesting for a refund. Reverse Comment:





 Once payment is ready for processing, click process icon located on the top right hand side. Make sure you tick the box that relates to the payment record that needs to be processed as shown below.

Miscellaneous Payment	Add Process Delete Back
	🛧 Student Payment 🦒
Cstudent Information & Payment Details	+ Student Payment Home
Student ID : 20170013	+ Summary
Student name: Ms Manna Training	+ Initial Payment
Total Miscellaneous Payment: 6114.10	- Missellanseus Payment
OSHC Payment: 500.00	
Pagineii. Due. 0000.00	+ Agent Commission
/ Add/Update Transaction	+ Refund History
Transaction Type: Miscellaneous® Service	+ Transfer Payment
Add student course info	+ Student Scholarship
Select Course: BSB50615 : Diploma of Human Resources Management-04/04/2017 - Current Student 🔻	+ Agent Advanced Payment
Select Service: Accommodation	
Service Category: Homestay V	
Select Facility: Room Sharing •	
Service Provider: Sydney Homestay Pty Ltd.	
Starts From: 02/07/2017	
Ends On: 3000/2017 Calculate Price	
invoice sent in iz/10/2017	
Payment status: Schedule (Nor Hal) V Due Date: (21/00/2017)	
Iotal Alloutini (2000) AUS INVOICE NO: 1000 Alloutini (1000)	
Accommodation paid monthly	
Barrate	
(cherrie)	
Sanch Dur Sancha 🔹 🕅 🔹	
Sealthy, Serve • (Air	
Micellaneous popment record for student: 20170013	
Invice No Invoice Sent Transitype Transaction Details Action	
📴 267 1535 💿 Service Type: Room Sharing(Course : BSB50615 - Attempt : Amount: \$1000( No GST) Due Date: 21/06/2017 🔮 🍧 🛍 🗠 🖬	
Remarks: Accommodation paid monthly; Last updated by: trainer @ 21/06/2017	
Kons Description   🖤 Refund Transaction   🔍 Modify Transaction   💷 Generate student receipt   🍟 Delete transaction	
Keverte iransaction   🖛 Keverte back to Normal iransaction	

- A pop up screen will appear to allow you to enter Payment date, Bank deposit date (if relevant) and Payment mode e.g. Cash, EFTPOS. Etc.
- Click **Process Payment** to continue.

Processing Miscellaneous F	ee
Receipt No:	1472
Total Processed Amount:	\$1,000.00
Payment Date:	21/06/2017
Bank Deposit Date:	21/06/2017
Payment Mode	EFTPOS V
	Process Payment





• A confirmation message will appear to indicate successful update ( as shown below)

Receipt No:	1472
Total Processed Amount:	\$1,000.00
Payment Date:	21/06/2017
Bank Deposit Date:	21/06/2017
Payment Mode	EFTPOS V
	Process Payment

• This payment record will still appear under miscellaneous payment record list with information that this invoice has been paid by the used Payment mode e.g. EFTPOS and receipt number as per below.

🔲 Mi	scellaneous pay	ment record for s	tudent: 2017001	3						
Invid	Invoice No	Invoice Sent	Trans Type	Transaction	Details					Action
267	1535		Service	Type:	Room Sharing(Course : BSB50615 - Attempt : 1)	Amount:	\$1000( No GST)	Due Date:	21/06/2017	\$ 😣 💱 🖹 🖹 🖾 🚺
l				Info ::	Paid On: 21/06/2017 (Receipt: 1472) By EFTPOS	Refund:	\$0	Reversed:	No	
				Remarks:	Accommodation paid monthly; Last updated by: trained	er @ 21/06/	2017			
Icons D	escription:   ^{(§} )	Refund Transactio Reverse Transacti	n   🍧 Modify T on   💠 Revert B	ransaction   🖺 ack to Normal Tra	Generate student receipt   🕙 Delete transaction					

• You can generate receipt or send receipt via email using the action icons found on the right hand side (as shown below). As per the other icon functions, refer to the Action Icon table on page 13.

M	scellaneous pay	ment record for st	udent: 2017001	3						
Invid	Invoice No	Invoice Sent	Trans Type	Transaction	Details					Action
267	1535		Service	Type:	Room Sharing(Course : BSB50615 - Attempt : 1)	Amount:	\$1000( No GST)	Due Date:	21/06/2017	\$ 8 \$ 1 1 1 0 U
				Remarks:	Accommodation paid monthly; Last updated by: traine	er @ 21/06	2017	Reversed:	NO	
						0				
cons L	lescription:   🥯	Refund Transaction	n   🍧 Modify T	ransaction   🖺	Generate student receipt   😢 Delete transaction					
	<del>ل</del> ا	Reverse Transactio	on I 🔶 Revert F	Back to Normal Tra	ansaction					

# **Provider Payment**

By this time, we already know how to **record payment** and **generate invoice** for additional services under miscellaneous payments. Now, we need to learn how to pay the third party service provider who delivered the service.

To manage this function, follow the instructions below:

- On your RTOManager, click Accounts > Provider Payment
- Enter relevant information using the search criteria (as shown below). Note that we are still using our case study information.





•	RTOMA	nager							Lo	gged In As A	A Trainer (train	ier)   🔒 Logo	out 🕴 🖸 Help	Sadmin	• /	All
Home	View Doc	Admin	Staff	Users	Courses	Timetable	Teacher	Offers	Student	Compliance	Communication	Marketing		ccounts	Reports	
Student	Payment A	gent Paymen	t   Staff	Timesheet	Bank Rec	onciliation	Accounts Set-	Up   Gen	erate Invoice	Employer Invoi	ice Provider Pay	/ment Acco	ount Integration	Import	Transaction	
P Search Se Serv Serv S	Student Paym Service Type: rvice Category: Select Facility: ice Start From: ervice Start To: unsaction Type:	Accommod Homestay Room Shai 27/06/2017 30/06/2017 All Transac View Service	Iation	yment												

- Click View Service details to generate service payment data.
- List of payment details that has been generated based on your search criteria will appear at the bottom of the page.

You may update information e.g. if **payment has been made**, you may need to **enter Date it was paid** and tick the box to indicate payment has been made and **select Payment Mode**. You may also **add your comments** on the remarks section as shown below

Roo	n Sharing P	'avment Det	ails betwee	m 27/06/2017	7 - 30/06/20	117											Order by: Stur	dent ID ,	Update Export E	Excel
🗆 Tra	nsaction	Student	Student	DoB	Student	Student	Student	Refunded	Service	Provider		Provider	Provider	Paid To	Paid Date	Mode	Reference	Remarks		
No 276		Id 20170013	Name	23/03/1987	Due	GST	Paid	0	Startdate 30/06/2017	Sydney H	Iomestav Ptv I td 💌	Amount	GST	Provider	27/06/2017	Direct Deposit	•	NAB depos	it reference no 1	234567
0 2/0		20170015	Training	23/03/1307	0071.40	0	165	0	30/00/2017	Syuncy I	iomestay Fty Etd. ¥	0201.14	0.00			Direct Deposit	•		at reference no 1	234307
		•	Onc	e all	info	rmat	tion	has I	been	ente	Agent Dedu Bad Debt Bank Chequ Bank Draft Cash Cheque Course Trar Credit Card Direct Debit Direct Debit Direct Depo EFTPOS Internet Tran Traveller Ch TT	cted le nsfer sit nsfer leque	date	butt	ton Jpdat	oto save	e. A confii	rmatio	٦	
			mes	sage	e will	app	bear	as p	er be	low.										



• You may also export the payment details to Excel format by clicking the Export excel icon which is located on the right hand side of the page (as shown below).

	Room Sharing I	Payment Det	'ails betwee	m 27/06/2017	- 30/06/20	17										Order by: Studen	Update Update t ID V / Ascending V
	Transaction	Student	Student	DoB	Student	Student	Student	Refunded	Service	Provider	Provider	Provider	Paid To	Paid Date	Mode	Reference	Remarks
	No	Id	Name		Due	GST	Paid		Startdate		Amount	GST	Provider				
	276	20170013	Manna	23/03/1987	6571.43	0	Yes	0	30/06/2017	Sydney Homestay Pty Ltd. 🔻	5257.14	0.00		27/06/2017	Direct Deposit 🔹		NAB deposit reference no 1234567
Í.			Training											-			

#### **Service Provider Allocation**

This menu allows you to allocate Services to providers in **bulk**. RTOManager is designed to allow you to record and manage different services you provide to your students.

In order to use this feature effectively, you have to set up your providers information and the service they provide via **Admin > Service Setup.** 

To generate the list, follow the instructions below:

• On your RTOManager, click **Compliance > Service Request Allocation.** 

♠ R	romar	nager									Logged	In As AA Trai	iner (train	ier)   🔒 Lo	gout   🖸	Help Sa	dmin	▼ / A	I Campus	•
Home	View Doc	Admin	Staff	Users	Courses	Timetable	Teacher	Offers	Student	Compliance	Communication	Marketing	CRM	Accounts	Reports					Updates
Edit Profile	e   Change F	assword	Evaluati	on   Leav	e Info					Attendance Ma	nagement									
										Academic Prog	ress									
			_							Intervention										
	Manage Pr Edit Your Pro	ofile		Documen Manage Doc	ts suments	Mat Man	erials Ide Course			Group Manage	ment									
			-			Mate	rials			Bulk Update		ate V Des	scending	· _						
										Generate Bulk	Certificate	vailable								
	Class Enro Activate Onlin	ol Ic		Reports View & Gene	erate		TMISS Data			Manage Orienta	ation	to • Docc	onding .	1						
	Class Enrolm	ent		Reports		/ 🔪 Expo	rt			Validate PRISM	IS		enuing ·	J						
~~						<u> </u>				Service Reques	st Allocation	-								
503	VSN Manage VSN	with	_	View NVR re	port &	View	TAC COR			Traineeship Vis	its									
~	VSR service			Export		repo	t for WA state			Manage Online	Test									
	To Do Lint																			
1	Add new task			ackup sta Backup		VE VE	reporting			Previous	Day	Tuesday, 27 Ju	une 2017		1	Vext Day				
										<u>7:00 A</u>	M							NO	IMAC	3E
				1161			HelpDeck			8:00 A	M							INC.		
	HigherEd rep	orting	USI	Verify / Revi	ew /		Download			10:00 /	AM							1	60 X 600	
				NEW Gene	state USI	•••	HOW TO			<u>11:00 /</u>	M									
	HeinDesk									12:00 F	<u>PM</u>									
	Log a ticket									2:00 P	M									
										3:00 P	M									

• On the Service Provider Allocation stage, Select the **Service Name** e.g. *Accommodation, airport pickup, visa processing etc.* 





		1005															🕐 Upda
н	ome	View Doc	Admin	Staff	Users	Courses	Timetable	Teacher	Offers	Student	Compliance	Communication	Marketing	CRM	Accounts	Reports	
•	Sei	vice Pro	ovider	Alloca	tion												Export Extel
6	earch S	ervice Reque	s														
				Se	rvice Name	Accommo	dation 💌										
				Service	Start From	: 01/06/2017											
				Serv	ice Start To	: 30/06/2017											
	Studen	t First Name /	Last Name	/ Student II	D / Offer ID	:	_										
					L	Search List	9										 

• Select Service dates started between two dates e.g. 01/06/2017 to 30/06/2017.

Note that these dates marked all those services that started within the dates mentioned.

Click Search List button to generate the Service request list (as shown below).

•	Service Provid	der Al	location											Export Excel	Update Calculate
	Search Service Request-														1
	Student First Name / Last	Name / St	Service Name Service Start From Service Start To udent ID / Offer ID	Accommodation     Accommodation     Introductor     Search List	)								Filter Data By	Mth Start Date	e Assigned V Ascending V
	Service Request														
	Stage StudentID	Offer Id	Student Name	Couse List	Category Name	Facility Name	Service Start	 Service Finish	Provider	Std Pri	e Provide	r Price	Comment	Invoice No	Update Status
	Student 20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	Room Sharing	30/06/2017	31/12/2017	Sydney Homestay Pty Ltd. 🔻 🔍	6571.4	5257.14	+ No GST		1539	A
	Student 20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	Room Sharing	30/06/2017	31/07/2017	Sydney Homestay Pty Ltd. 🔹 🔍	1108.0	886.00	+ No GST			9
6	Student 20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	2016 House single	30/06/2017	30/07/2017	No Provider Assigned V	1071.4	0.00	+ No GST		1540	9
	Student CRM20160018	1318	Gerry Smith	BIT(Current Student)	Apartment	private Room	26/06/2017	09/07/2017	Sydney Homestay Pty Ltd. 🔻 🛈	557.14	464.29	+ No GST		1538	9
6	Student CRM20160018	1318	Gerry Smith	BIT(Current Student)	Homestay	2016 House single	26/06/2017	09/07/2017	No Provider Assigned V	464.29	0.00	+ No GST		1538	9
E	Student VFH20150018	1368	VFH Test	BSB40212(Current Student)	Homestay	2016 House single	20/06/2017	08/07/2017	No Provider Assigned V	642.86	0.00	+ No GST		1541	9

• Tick the box of all services provided by the same provider and click Update icon located on the top right hand side of the page. The update the status will change to green icon icon the update.

=	Service R	equest													
	Stage	StudentID	Offer	Student	Couse List	Category	Facility Name	Service Start	Service Finish	Provider	Std Price	Provider Price	Comment	Invoice	Update
			ld	Name		Name								No	Status
•	Student	20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	Room Sharing	30/06/2017	31/12/2017	Sydney Homestay Pty Ltd. •	6571.43	5257.14 + No GST		1539	<b>v</b>
•	Student	20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	Room Sharing	30/06/2017	31/07/2017	Sydney Homestay Pty Ltd.	1108.00	886.00 + No GST			0
	Student	20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	2016 House single	30/06/2017	30/07/2017	No Provider Assigned V	1071.43	0.00 + No GST		1540	8
•	Student	CRM20160018	1318	Gerry Smith	BIT(Current Student)	Apartment	private Room	26/06/2017	09/07/2017	Sydney Homestay Pty Ltd. •	557.14	464.29 + No GST		1538	<b>o</b>
	Student	CRM20160018	1318	Gerry Smith	BIT(Current Student)	Homestay	2016 House single	26/06/2017	09/07/2017	No Provider Assigned V	464.29	0.00 + No GST		1538	8

• The list can also be exported in an Excel format by clicking the Excel export icon is located on the right hand side of the page.





You may also notice that some service requests do not have a corresponding provider. E.g. No
Provider assigned. To assign a new provider, you can update the service information by going
back to Students' additional service request and assign the provider and services accordingly
(Student > Profile > Additional Service Request)

11	Service R	equest													
	Stage	StudentID	Offer	Student	Couse List	Category	Facility Name	Service Start	Service Finish	Provider	Std Price	Provider Price	Comment	Invoice	Update
			ld	Name		Name								No	Status
	Student	20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	Room Sharing	30/06/2017	31/12/2017	Sydney Homestay Pty Ltd. •	6571.43	5257.14 + No GST		1539	0
	Student	20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	Room Sharing	30/06/2017	31/07/2017	Sydney Homestay Pty Ltd. •	1107.14	885.71 + No GST			0
	Student	20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	2016 House single	30/06/2017	30/07/2017	No Provider Assigned V	0	0 + No GST		1540	0
	Student	CRM20160018	1318	Gerry Smith	BIT(Current Student)	Apartment	private Room	26/06/2017	09/07/2017	Sydney Homestay Pty Ltd. •	557.14	464.29 + No GST		1538	0
6	Student	CRM20160018	1318	Gerry Smith	BIT(Current Student)	Homestay	2016 House single	26/06/2017	09/07/2017	No Provider Assigned V	0	0 + No GST		1538	0
٥	Student	VFH20150018	1368	VFH Test	BSB40212(Current Student)	Homestay	2016 House single	20/06/2017	08/07/2017	No Provider Assigned V	0	0 + No GST		1541	0
F															

To assign a new provider, you can update the service information by going back to Students' additional service request and assign the provider and services accordingly (Student > Profile > Additional Service Request)

Note  $\rightarrow$  The service allocation feature allows to view the list of services that are yet to be allocated to the provider and then link to the provider and also this will then make it ready to create the invoice in the Finance section.