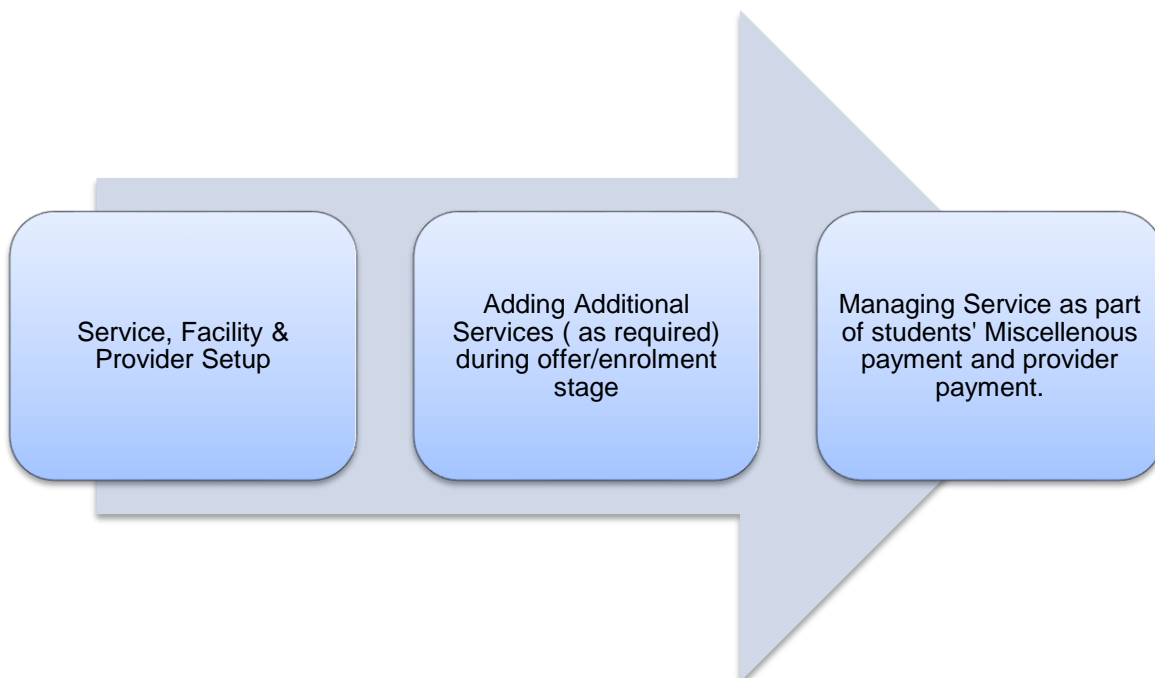


## Service Management Guide

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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

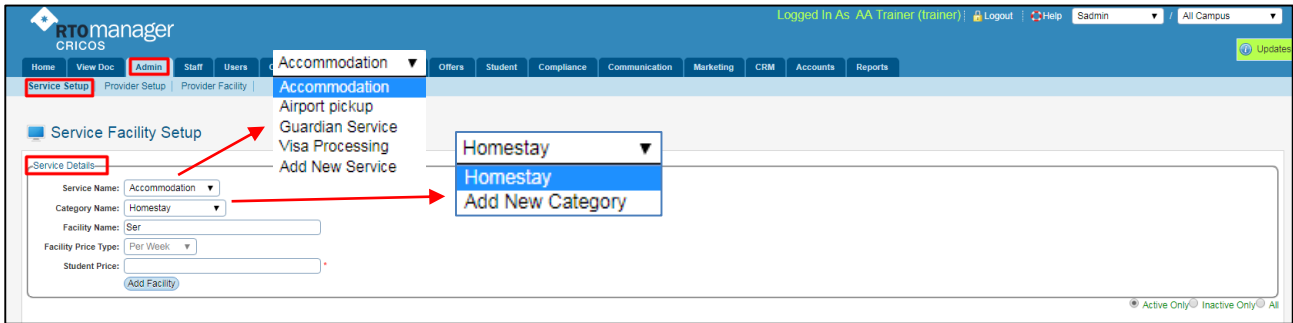


To manage this feature in your RTOManager, we need to first set **up Service facility**.

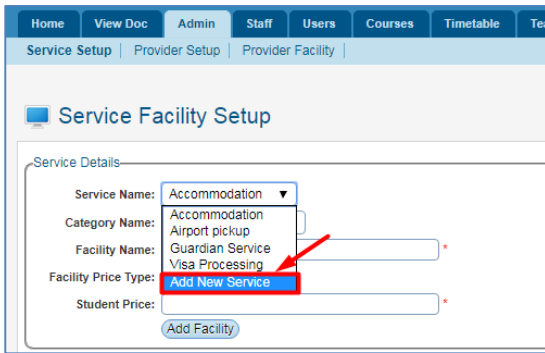
### Service Setup

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

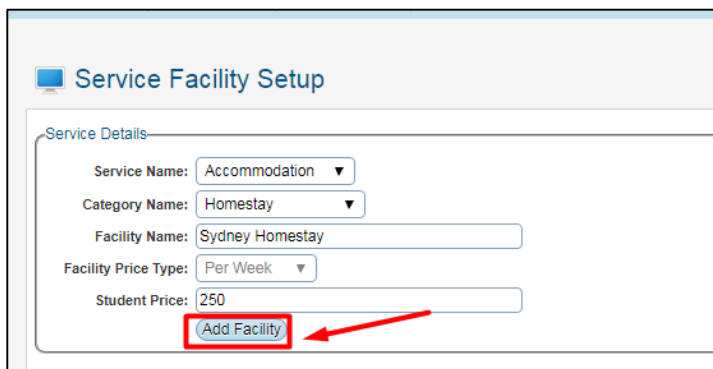
- On your RTOManager, click **Admin > Service Set up**.
- On the **Service Details** section, select the **Service Name** form the drop down menu e.g. *Accommodation* (as shown in the example below).



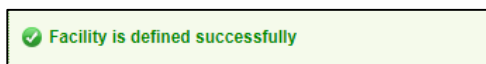
**Note:** if the service you are after is not on the dropdown list, select **Add New Service**



- 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.



- A confirmation message will appear to indicate facility information has been recorded 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 Facility Setup**

Service Details:

Service Name: Accommodation  
 Category Name: Homestay  
 Facility Name: Sydney Homestay  
 Facility Price Type: Per Week  
 Student Price: 250  
 Add Facility

Facility is defined successfully

Service Name	Date Type	Allow Student to choose provider	Internal Only	Category	Facility Name	Active	Price Type	Student Price	Action
Accommodation	Date Only	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Homestay	2016 House single	<input checked="" type="checkbox"/>	Per Week	250.00	[Pencil] [Wrench] [Off] [X]
Accommodation	Date Only	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Homestay	Sydney Homestay	<input checked="" type="checkbox"/>	Per Week	250.00	[Pencil] [Wrench] [Off] [X]
Airport pickup	Date Time	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Airport	Airport transfer	<input checked="" type="checkbox"/>	Per Service	100.00	[Pencil] [Wrench] [Off] [X]
Guardian Service	Date Only	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Guardian Service	Guardian Service	<input checked="" type="checkbox"/>	Per Service	200.00	[Pencil] [Wrench] [Off] [X]
Visa Processing	Date Only	<input type="checkbox"/>	<input type="checkbox"/>	Visa	Student Visa	<input checked="" type="checkbox"/>	Per Service	1000.00	[Pencil] [Wrench] [Off] [X]

### 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 Service Category**

Service Name: Accommodation  
 Category Name: Homestay  
 Date Type: Date Only  
 Allow student to choose provider for this service  
 Internal Only  
 Update Service

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

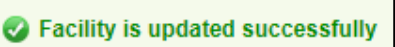


Allows you to modify facility information which includes change in facility name and the Student Price. When you click on this icon, a pop up screen will appear to allow you to make the necessary changes. Once update has been made, click **Update Facility** to record the change (as shown below).

### Update Facility

Facility Name:


Student Price:




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



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 Name	Date Type	Allow Student to choose provider	Internal Only	Category	Facility Name	Active	Price Type	Student Price	Action
Accommodation	Date Only	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Homestay	2016 House single	<input checked="" type="checkbox"/>	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 Name	Date Type	Allow Student to choose provider	Internal Only	Category	Facility Name	Active	Price Type	Student Price	Action
Accommodation	Date Only	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Homestay	Sydney Homestay	<input type="checkbox"/>	Per Week	250.00	  



Allows you to delete your selected service details off the service list.

Service Name	Date Type	Allow Student to choose provider	Internal Only	Category	Facility Name	Active	Price Type	Student Price	Action
Accommodation	Date Only	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Homestay	2016 House single	<input checked="" type="checkbox"/>	Per Week	250.00	 

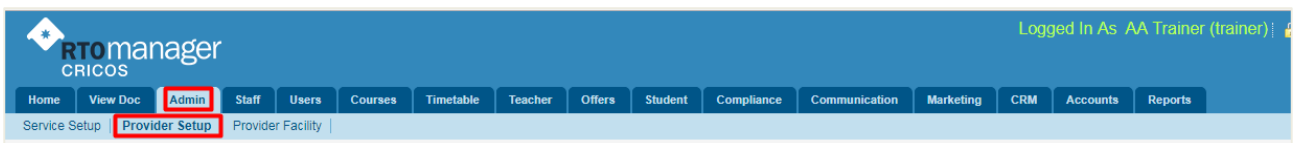
A confirmation message will appear to confirm deletion.

✔ Facility is removed successfully.

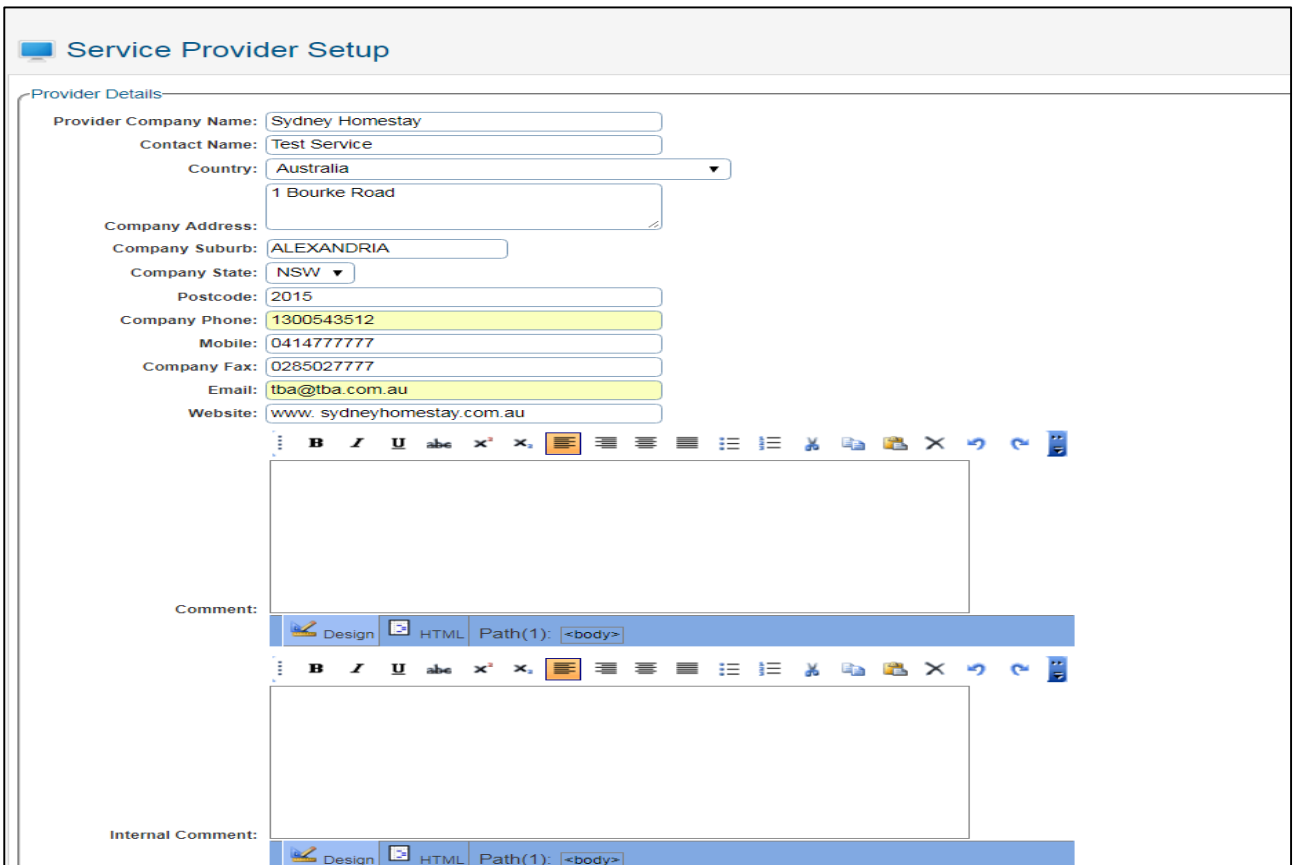
## Provider Setup

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**



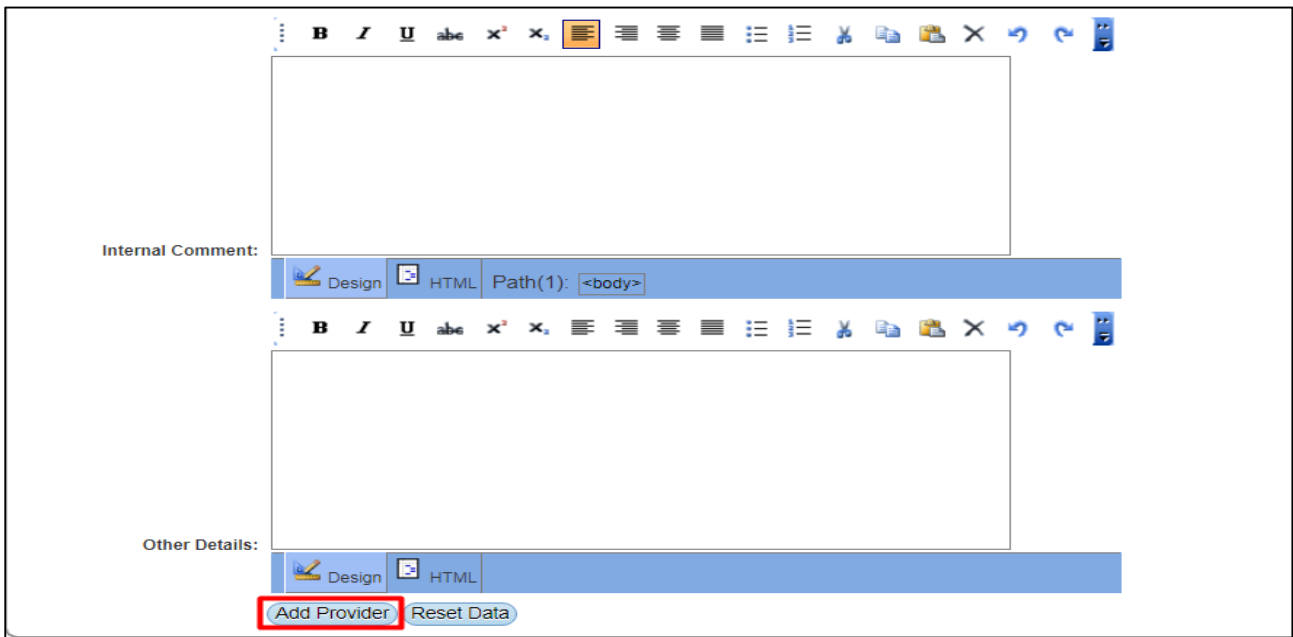
- Enter relevant information the fields provided. Make sure that all fields with asterisk are completed.



The screenshot shows the 'Service Provider Setup' form. The form fields are as follows:

- Provider Company Name: Sydney Homestay
- Contact Name: Test Service
- Country: Australia
- Company Address: 1 Bourke Road
- Company Suburb: ALEXANDRIA
- Company State: NSW
- Postcode: 2015
- Company Phone: 1300543512
- Mobile: 0414777777
- Company Fax: 0285027777
- Email: tba@tba.com.au
- Website: www.sydneyhomestay.com.au

Below the form fields are two rich text editors for 'Comment' and 'Internal Comment', each with a toolbar and a 'Design' button.











- 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 details are recorded successfully

View Provider List

Search Provider By: All Provider

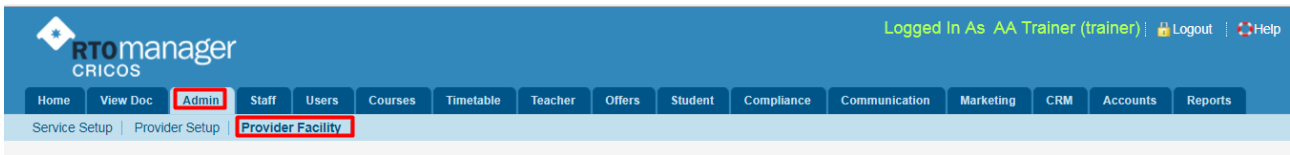
Company Name	Contact Name	Address	Phone	Mobile	Fax	Email	Website	Comment	Internal Comment	Other Details	Active	Action
ABCY Group	Benny	12 Broadway Street BANKSTOWN NORTH NSW 2200 Australia	02 7654 3456			info@abcygroup.com.au					<input checked="" type="checkbox"/>	 
airport line pty ltd	Gordan	34 Croydon Street ALTONA NORTH VIC 3025 Australia	02 7654 3451			info@airportline.com.au					<input checked="" type="checkbox"/>	 
Websutra test	John Citizen	184 Bourke road, ALEXANDRIA NSW 2015 Australia	404312569	0404312569	404312569	sanketshres@gmail.com					<input checked="" type="checkbox"/>	 
Sydney Homestay	Test Service	1 Bourke Road ALEXANDRIA NSW 2015 Australia	1300543512	0414777777	0285027777	tba@tba.com.au	www.sydneyhomestay.com.au				<input checked="" type="checkbox"/>	 

## Provider Facilities Setup

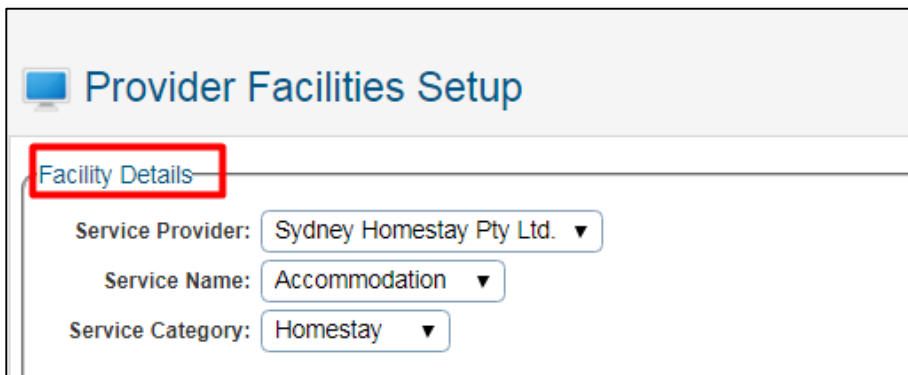
By this time, you have set up the provider information and the facilities or services that you offer to students in your college. Now, we need to 'assign' the Services to their respective Service provider.

To manage this function, follow the instructions below:

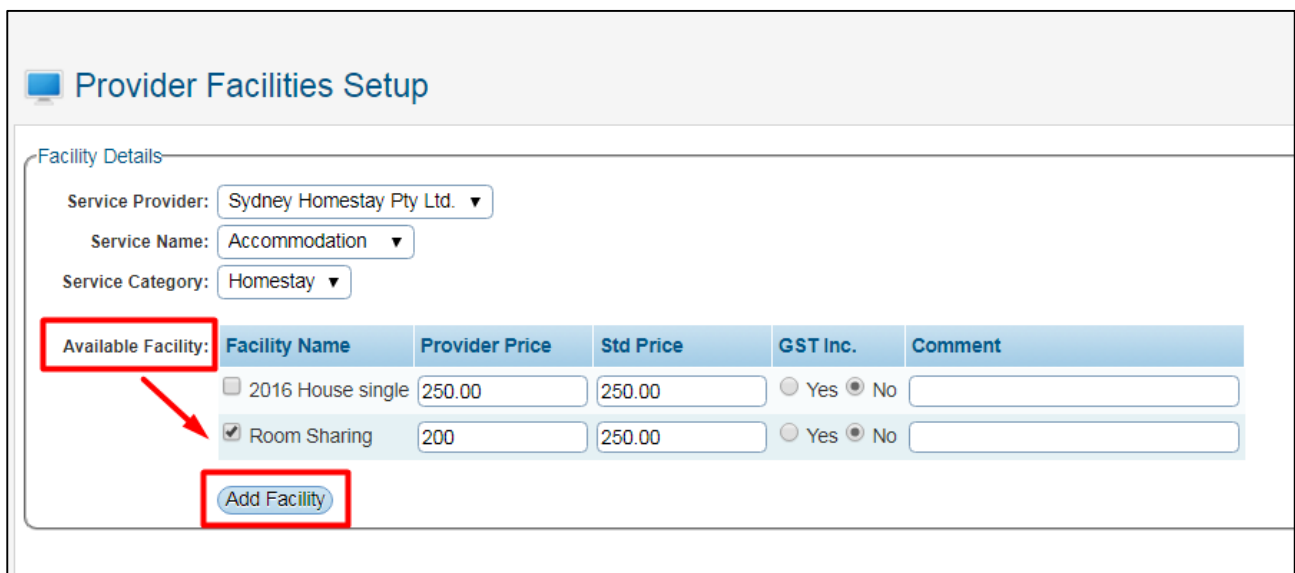
- On your RTOManager, click **Admin > Provider Facility**



- 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.



- 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*.






Available Facility:	Facility Name	Provider Price	Std Price	GST Inc.	Comment
<input type="checkbox"/>	2016 House single	250.00	250.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	
<input checked="" type="checkbox"/>	Room Sharing	200	250.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	

- 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 successfully

Provider Facility List

Service Name	Category Name	Facility Name	Active	Provider Price	Std Price	GST Inc.	Comment	Action
Accommodation	Homestay	Room Sharing Room Sharing	<input checked="" type="checkbox"/>	250.00	250.00	<input type="radio"/> Yes <input checked="" type="radio"/> No		  

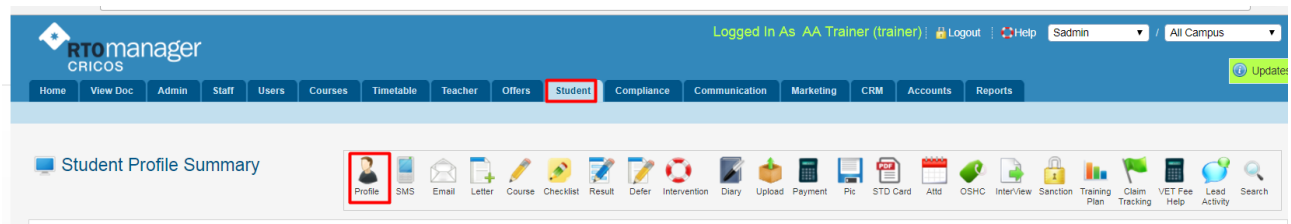
After we have set up the Services, facilities and provider setup, we will now look into how this function will be utilised in the Student management and Finance section.


### 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 Users Courses Timetable Teacher Offers **Student** Compliance Communication Marketing CRM Accounts Reports

[View details of Ms Manna Training](#) Back

**Student Address Details**

Mailing/Residential contact address  
 Type: Current Street Address  
 Address: Bourke Road/Bourke Road 12 Phone/WorkPhone: 414234234/414234234  
 ALEXANDRIA NSW Fax:  
 Australia 2015 Mobile: 0414234234

**Education Qualification History**

Action	Qualification Level	Name of Qualification	School/Institution	State/Country	Year Completed
<input type="checkbox"/>	Bachelor Degree or Higher Degree Level				

**Employment History**

Action	Employer	Occupation	Start Date	Finish Date	Duties
<input type="checkbox"/>			26/06/2017	26/06/2017	

**Emergency/Guardian contact details**

Action	Contact Type	Contact Name	Relationship	Address	Phone	Email
<input checked="" type="checkbox"/>	Guardian	John Smith	Father	1 Bourke Road Alexandria NSW 2015	61456456	

**Additional Service Request** +

Offer ID: 1371

Service Request: ⚠ No service data found

OSHC: Not Requested  
 Disability: No

How did you first hear about us? (Lead Source): Website  
 Please provide more details (Know From): friend

Go To Top

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

**Edit Additional Service Request (Offer ID: 1371)**

**Service Request**

**Additional Service Request**

Select Service: ---Select Service---

---Select Service---

Accommodation

Airport pickup

Guardian Service

Visa Processing

⚠ No service d

**Overseas Stud**

- 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 Service Request (Offer ID: 1371 )

Service Request

### Additional Service Request

Select Service: Accommodation ▼

Service Category: Homestay ▼

Select Facility: Room Sharing ▼

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

Student Total Charged: \$ 6571.43

Total Provider Price To Be Paid: \$ 5257.14

Allergies/Special Requirements (Dietary etc.):


Add Service

Calculate Total Price

Homestay ▼  
Homestay  
Apartment  
Boarding House

Room Sharing ▼  
2016 House single  
Room Sharing

Sydney Homestay Pty Ltd. ▼  
Sydney Homestay Pty Ltd.  
No provider is Assigned

- 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:

Service Category:

Select Facility:

Service Provider:

Student Price: \$250.00 **Per Week**

Provider Price: \$200.00 **Per Week**

Starts From:



Ends On:  [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 Name	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		 

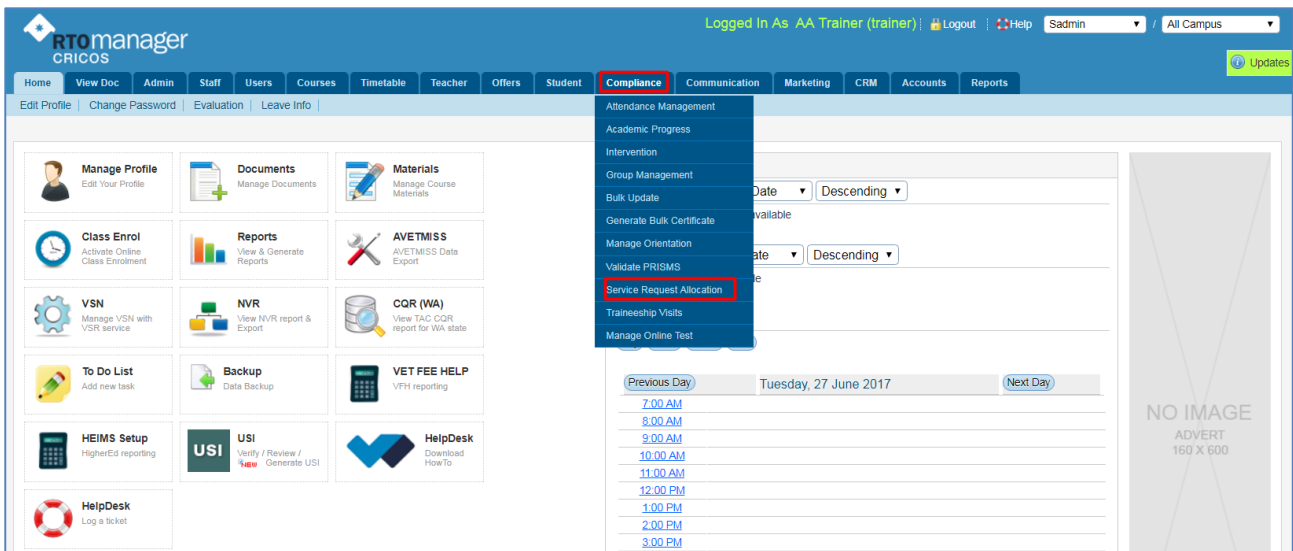
### Service Provider Allocation

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**.

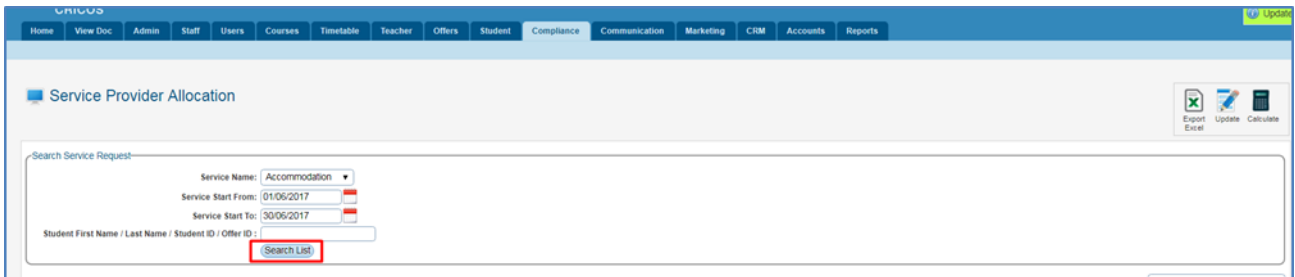
To generate the list, follow the instructions below:

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



The screenshot shows the RTOManager interface. The top navigation bar includes 'Home', 'View Doc', 'Admin', 'Staff', 'Users', 'Courses', 'Timetable', 'Teacher', 'Offers', 'Student', 'Compliance', 'Communication', 'Marketing', 'CRM', 'Accounts', and 'Reports'. The 'Compliance' menu is open, showing options like 'Attendance Management', 'Academic Progress', 'Intervention', 'Group Management', 'Bulk Update', 'Generate Bulk Certificate', 'Manage Orientation', 'Validate PRISMS', 'Service Request Allocation' (highlighted with a red box), 'Traineeship Visits', and 'Manage Online Test'. The main content area shows a grid of service request allocation data for Tuesday, 27 June 2017, with time slots from 7:00 AM to 3:00 PM.

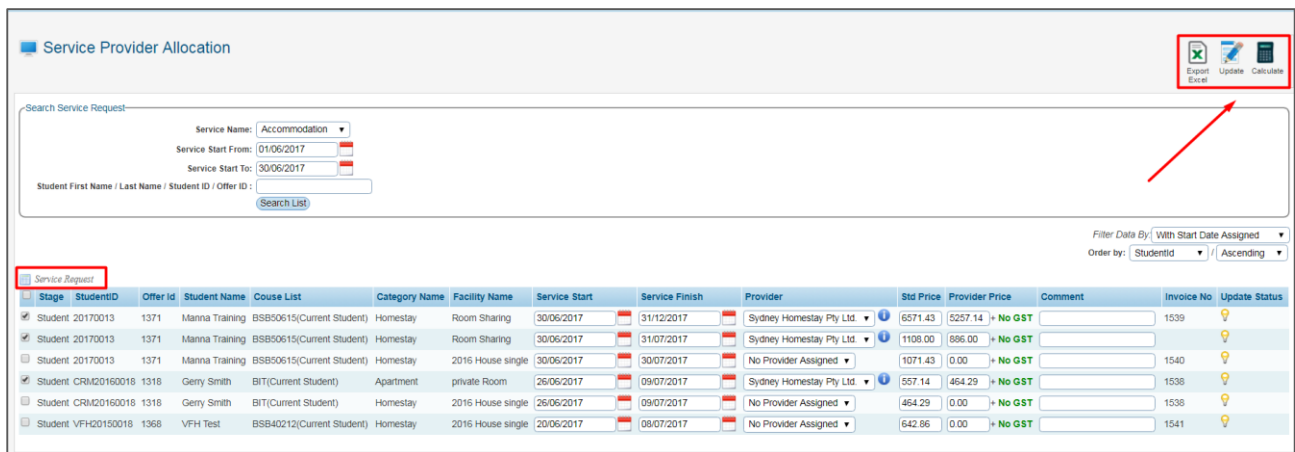
- On the Service Provider Allocation stage, Select the **Service Name** e.g. *Accommodation, airport pickup, visa processing etc.*



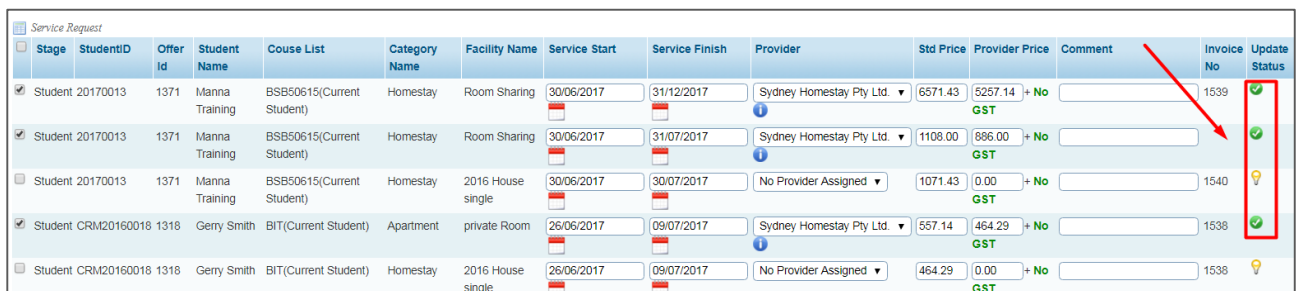
- Select **Service dates** started between two dates e.g. *01/06/2017 to 30/06/2017*.

**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).



- 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 to confirm the update.



- The list can also be exported in an Excel format by clicking the Excel export icon 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)**

Stage	StudentID	Offer Id	Student Name	Couse List	Category Name	Facility Name	Service Start	Service Finish	Provider	Std Price	Provider 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	6571.43	5257.14 + GST	+ No	1539	✓
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 + GST	+ No		✓
Student	20170013	1371	Manna Training	BSB50615(Current Student)	Homestay	2016 House single	30/06/2017	30/07/2017	No Provider Assigned	0	0 + GST	+ No	1540	✓
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 + GST	+ No	1538	✓
Student	CRM20160018	1318	Gerry Smith	BIT(Current Student)	Homestay	2016 House single	26/06/2017	09/07/2017	No Provider Assigned	0	0 + GST	+ No	1538	✓
Student	VFH20150018	1368	VFH Test	BSB40212(Current Student)	Homestay	2016 House single	20/06/2017	08/07/2017	No Provider Assigned	0	0 + GST	+ No	1541	✓

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)**

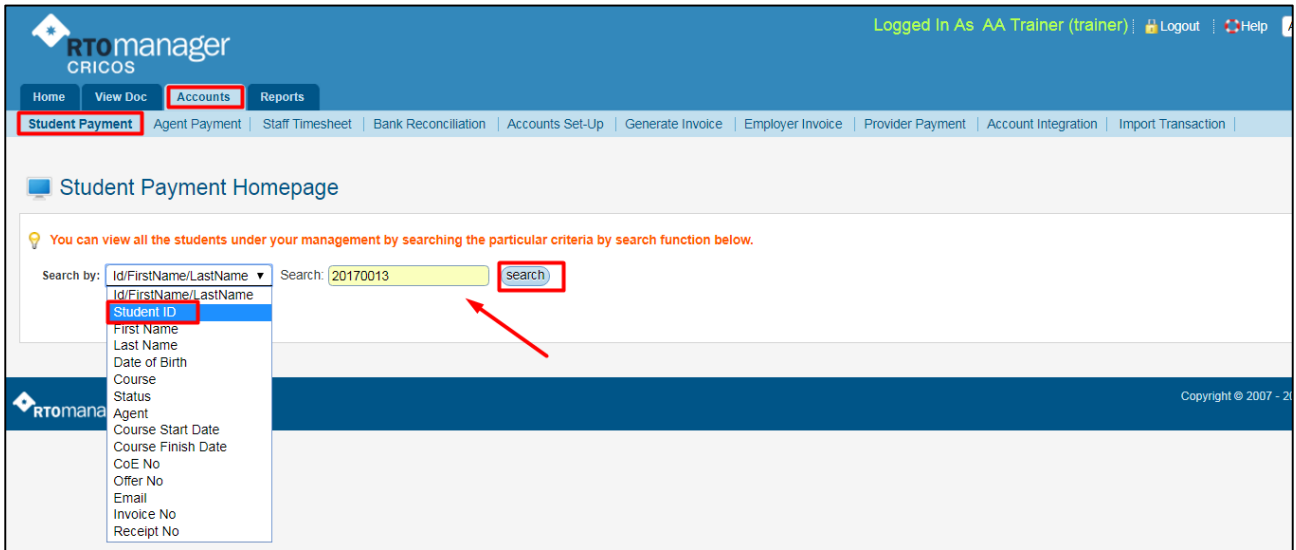
Note → The service allocation feature allows to view the list of services that are yet to be allocated to the provider and then link to the provider and also this will then make it ready to create the invoice in the Finance section.

### Student Payment Management

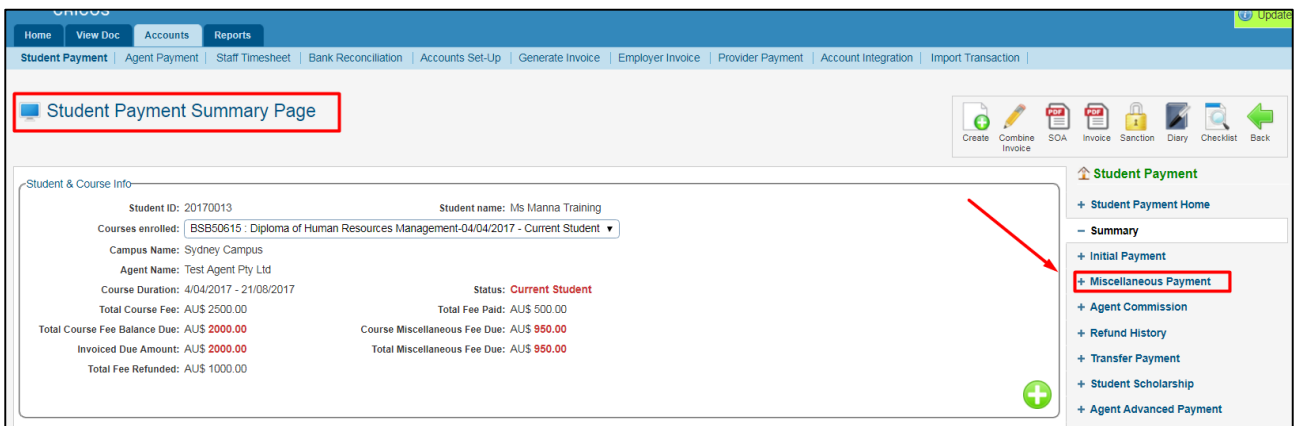
Once additional service has been added to the students' profile, accounts team may now raise an invoice and collect payment from the student. Note that first the invoices for the service is added and then as the payment is made then it is recorded against the invoice.


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*



- On the Student Payment Summary page, click **miscellaneous payment**.



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

- 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** –

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

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)
- **Due Date**
- **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.

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

Starts From:    
 Ends On:  [Calculate Price](#)

and finish date).

- **Invoice number** (this is generated automatically by the system unless you opt/use/link with Existing invoice.  [Link With Existing Invoice](#)

- 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

**Miscellaneous payment has been recorded successfully**






- **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.

**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.

Icon	Function
------	----------



	<p>Allows you to refund the payment (if required).</p> <p>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.</p> <p>You can facilitate this function this by clicking the refund icon .</p> <p>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.</p> <div data-bbox="491 757 1311 1393" style="border: 1px solid black; padding: 10px;"> <p><b>Transaction Refund</b></p> <p>Payment No. 274</p> <p>Payment type Room Sharing</p> <p>Amount paid AU\$6571.43</p> <p><b>Administration Cost</b> <input type="text" value="100"/> AU\$</p> <p>Refund amount <input type="text" value="6471.43"/> AU\$</p> <p>Refund schedule date <input type="text" value="26/06/2017"/> </p> <p>Refund date <input type="text" value="26/06/2017"/> </p> <p>Refund mode <input type="text" value="Cash"/> ▼</p> <p>Comment: <input type="text" value="Student has found another accommodation and is asking for refund."/></p> <p><b>Update Refund Info</b></p> </div>
	<p>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.</p>

### 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: <input type="text" value="no longer required"/>	

Confirm Delete

Allows you to pay/update/ modify invoice. To record payment for this invoice, click this icon. it will go back to your Add/Update Transaction section and you may change the payment status from **schedule not paid** to **Normal Paid** and click **Update Info**

-Add/Update Transaction-

Transaction Type:  Miscellaneous  Service

Add student course info

Select Course: BSB50615 : Diploma of Human Resources Management-04/04/2017 - Current Student

Select Service: Accommodation

Service Category: Homestay

Select Facility: Room Sharing

Service Provider: Sydney Homestay Pty Ltd.

Starts From: 02/07/2017

Ends On: 30/07/2017 [Calculate Price](#)

Invoice Sent

Payment Status: Schedule (Not Paid)

Total Amount: 250.00 AUS

GST Included? GST Amount: AUS 0.00

Remarks:

[Update Info](#)

Invoice Sent on: 21/06/2017

Due Date: 21/06/2017



Invoice No: 1535 [Link With Existing Invoice](#)


Schedule (Not Paid) ▼

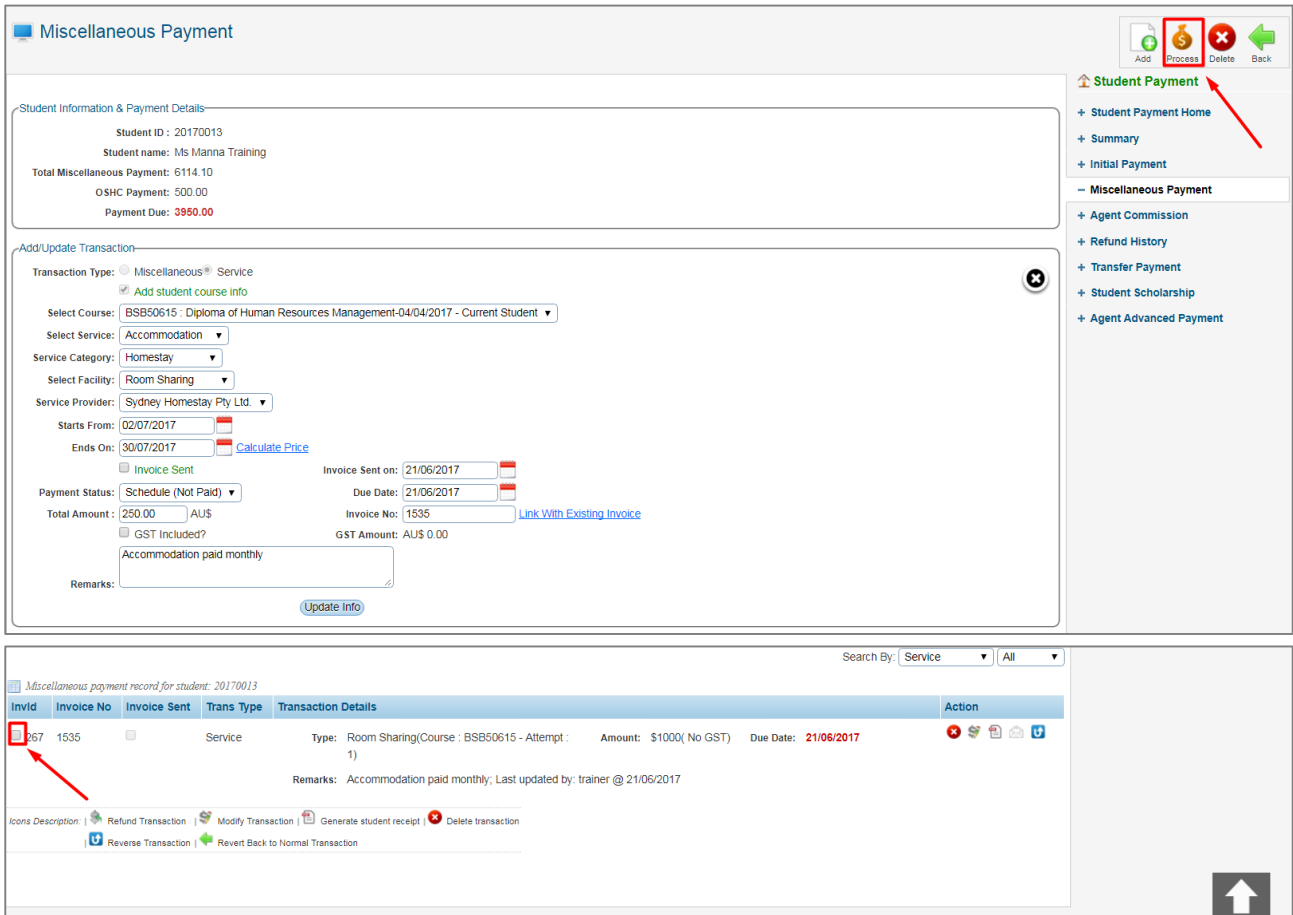
Normal (Paid)

Schedule (Not Paid)



	<p>Allows you to send the invoice and/or receipt via email.</p> <div data-bbox="497 465 1396 1330"> <h3>Send Email to Student</h3> <p>Send from: Me : manna.maniago@meshedgroup.com.au</p> <p>Student name: Manna Training</p> <p>Personal email: <input checked="" type="checkbox"/> manna.maniago@meshedgroup.com.au</p> <p>CC: <input type="text"/></p> <p><small>Provide multiple emails separated by comma (email1,email2,...)</small></p> <p>Select Template: <input type="text" value="Select Template"/></p> <p>Subject: <input type="text"/></p> <div data-bbox="598 694 1385 1153"> <p>Rich text editor toolbar with options: Paragraph, Font, Size, Color, Highlight, Bold, Italic, Underline, Undo, Redo, Insert, Link, Unlink, Image, Table, etc.</p> <p>Design   HTML</p> </div> <p>File attachment: <input type="text" value="Choose File"/> No file chosen</p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Attach Payment Invoice</li> <li><input checked="" type="checkbox"/> Add To Student Communication Log</li> <li><input checked="" type="checkbox"/> Invoice Sent</li> </ul> <p><input type="button" value="Send Email"/></p> </div>
	<p>Allows you to reverse the transaction (as required). When you click this icon, system will ask for comment/reason for payment reversal.</p> <div data-bbox="491 1585 1279 1861"> <h3>Reverse Transaction</h3> <p><b>Please be noted that you may not have access to make this transaction back to normal</b></p> <p>Reverse Comment: <input type="text" value="Accommodation no longer required. Student is requesting for a refund."/></p> <p><input type="button" value="Reverse Now"/></p> </div>

- 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**

Student Information & Payment Details  
 Student ID : 20170013  
 Student name : Ms Manna Training  
 Total Miscellaneous Payment: 6114.10  
 OSHC Payment: 500.00  
 Payment Due: **3950.00**

Add/Update Transaction  
 Transaction Type: Miscellaneous\* Service  
 Add student course info  
 Select Course: BSB50615 : Diploma of Human Resources Management-04/04/2017 - Current Student  
 Select Service: Accommodation  
 Service Category: Homestay  
 Select Facility: Room Sharing  
 Service Provider: Sydney Homestay Pty Ltd  
 Starts From: 02/07/2017  
 Ends On: 30/07/2017 [Calculate Price](#)  
 Invoice Sent  
 Invoice Sent on: 21/06/2017  
 Payment Status: Schedule (Not Paid)  
 Due Date: 21/06/2017  
 Total Amount : 250.00 AU\$  
 Invoice No: 1535 [Link With Existing Invoice](#)  
 GST Included?  
 GST Amount: AU\$ 0.00  
 Remarks: Accommodation paid monthly  
[Update info](#)

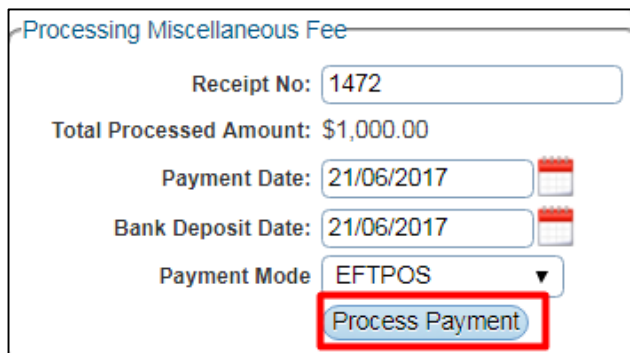
Student Payment  
 + Student Payment Home  
 + Summary  
 + Initial Payment  
 - Miscellaneous Payment  
 + Agent Commission  
 + Refund History  
 + Transfer Payment  
 + Student Scholarship  
 + Agent Advanced Payment

Miscellaneous payment record for student: 20170013

Invid	Invoice No	Invoice Sent	Trans Type	Transaction Details	Action
<input checked="" type="checkbox"/>	267 1535	<input type="checkbox"/>	Service	Type: Room Sharing(Course : BSB50615 - Attempt : 1) Amount: \$1000(No GST) Due Date: 21/06/2017 Remarks: Accommodation paid monthly; Last updated by: trainer @ 21/06/2017	

Icons Description: Refund Transaction Modify Transaction Generate student receipt Delete transaction  
 Reverse Transaction Revert Back to Normal Transaction

- 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 Fee**

Receipt No: 1472

Total Processed Amount: \$1,000.00

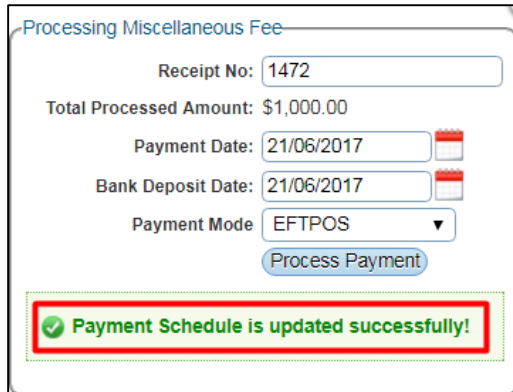
Payment Date: 21/06/2017

Bank Deposit Date: 21/06/2017

Payment Mode: EFTPOS

**Process Payment**

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



- 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.

Invid	Invoice No	Invoice Sent	Trans Type	Transaction Details	Action
267	1535	<input type="checkbox"/>	Service	Type: Room Sharing(Course : BSB50615 - Attempt : 1) Amount: \$1000( No GST) Due Date: 21/06/2017 Info :: <b>Paid On: 21/06/2017 (Receipt: 1472) By EFTPOS</b> Refund: \$0 Reversed: No Remarks: Accommodation paid monthly; Last updated by: trainer @ 21/06/2017	

- 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.

Invid	Invoice No	Invoice Sent	Trans Type	Transaction Details	Action
267	1535	<input type="checkbox"/>	Service	Type: Room Sharing(Course : BSB50615 - Attempt : 1) Amount: \$1000( No GST) Due Date: 21/06/2017 Info :: <b>Paid On: 21/06/2017 (Receipt: 1472) By EFTPOS</b> Refund: \$0 Reversed: No Remarks: Accommodation paid monthly; Last updated by: trainer @ 21/06/2017	

## 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.

RTOmanager CRICOS | Logged In As AA Trainer (trainer) | Logout | Help | Sadmin

Home | View Doc | Admin | Staff | Users | Courses | Timetable | Teacher | Offers | Student | Compliance | Communication | Marketing | CRM | **Accounts** | Reports

Student Payment | Agent Payment | Staff Timesheet | Bank Reconciliation | Accounts Set-Up | Generate Invoice | Employer Invoice | **Provider Payment** | Account Integration | Import Transaction

**Provider Allocation / Payment**

Search Student Payment

Service Type: Accommodation  
 Service Category: Homestay  
 Select Facility: Room Sharing  
 Service Start From: 27/06/2017  
 Service Start To: 30/06/2017  
 Transaction Type: All Transaction

**View Service Details**

- 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

Room Sharing Payment Details between 27/06/2017 - 30/06/2017

Order by: Student ID | Ascending


Transaction No	Student Id	Student Name	DoB	Student Due	Student GST	Student Paid	Refunded	Service Startdate	Provider	Provider Amount	Provider GST	Paid To Provider	Paid Date	Mode	Reference	Remarks
276	20170013	Manna Training	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

- Agent Deducted
- Bad Debt
- Bank Cheque
- Bank Draft
- Cash
- Cheque
- Course Transfer
- Credit Card
- Direct Debit
- Direct Deposit**
- EFTPOS
- Internet Transfer
- Traveller Cheque
- TT

- Once all information has been entered, click Update button to save. A confirmation message will appear as per below.

**Update Status**

✔ Student :: 20170013 : Provider Payment is processed successfully

- 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).

Transaction No	Student ID	Student Name	DoB	Student Due	Student GST	Student Paid	Refunded	Service Startdate	Provider	Provider Amount	Provider GST	Paid To Provider	Paid Date	Mode	Reference	Remarks
276	20170013	Manna Training	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

### 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.

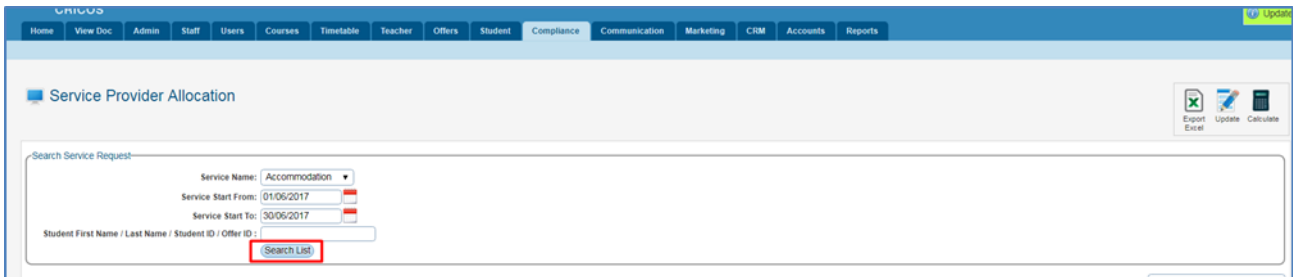
In order to use this feature effectively, you have to set up your providers information and the service they provide via **Admin > Service Setup**.

To generate the list, follow the instructions below:

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

The screenshot shows the RTOManager web interface. The top navigation bar includes 'Home', 'View Doc', 'Admin', 'Staff', 'Users', 'Courses', 'Timetable', 'Teacher', 'Offers', 'Student', 'Compliance', 'Communication', 'Marketing', 'CRM', 'Accounts', and 'Reports'. The 'Compliance' menu is open, showing options like 'Attendance Management', 'Academic Progress', 'Intervention', 'Group Management', 'Bulk Update', 'Generate Bulk Certificate', 'Manage Orientation', 'Validate PRISMS', 'Service Request Allocation' (highlighted with a red box), 'Traineeship Visits', and 'Manage Online Test'. The main content area shows a calendar for Tuesday, 27 June 2017, with a 'NO IMAGE ADVERT 160 X 600' placeholder.

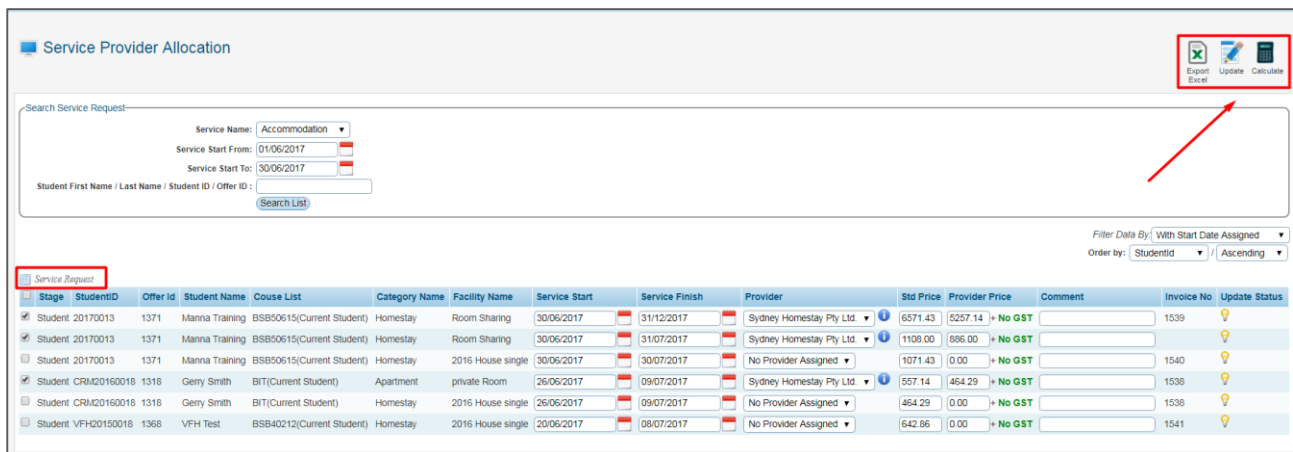
- On the Service Provider Allocation stage, Select the **Service Name** e.g. *Accommodation, airport pickup, visa processing etc.*



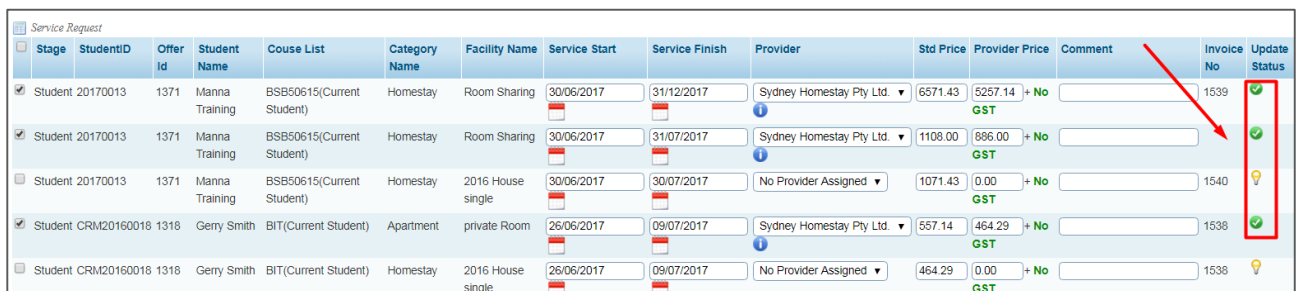
- Select **Service dates** started between two dates e.g. *01/06/2017 to 30/06/2017*.

**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).



- 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 to confirm the update.



- The list can also be exported in an Excel format by clicking the Excel export icon 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)**

Stage	StudentID	Offer id	Student Name	Couse List	Category Name	Facility Name	Service Start	Service Finish	Provider	Std Price	Provider 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.	6571.43	5257.14 + No GST		1539	✓
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			✓
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	✓
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	✓
Student	CRM20160018	1318	Gerry Smith	BIT(Current Student)	Homestay	2016 House single	26/06/2017	09/07/2017	No Provider Assigned	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	0	0 + No GST		1541	✓

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 → 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.