



# Quick-Start Training Guide for Fee Management



**Welcome to Vanco's Fee Management!** This comprehensive training guide is designed to empower office admins like you to quickly master Fee Management and unlock its full potential. We are here to support you every step of the way, ensuring you save time, streamline financial processes and eliminate tracking nightmares. Click on the video links below to become a fee management master in less than an hour.

## Fee Management Basics (~12 min)

### 1 Introduction to Fee Management

(~1 min)

This guide provides an overview of the Fee Management platform and its benefits, demonstrating how it simplifies your school's financial management.

### 2 How to Create and Assign Fees

(~5 min)

This guide offers step-by-step instructions to create and assign fees effortlessly, while also providing insights on customizing fees to suit your school's specific needs.

### 3 How to Copy Fees

(~2 min)

Learn to quickly duplicate fees for similar events or activities, saving time with the copy feature for recurring fees.

### 4 How to Add Students

(~3 min)

Effortlessly add students to Fee Management for accurate records and easy fee assignment.

### 5 How to Link a Student to a Parent Account

(~1 min)

Learn how parents can link their account to their student for smooth transactions and facilitate easier payments for parents with multiple students.

# VANCO

[vancopayments.com](http://vancopayments.com)

## Data Management (~14 min)

1

### How to Search for Unpaid Fees on Accounts

(~4 min)

Easily find and manage unpaid fees in the system, keeping track of outstanding payments for efficient follow-ups.

2

### How to Manage Invoices

(~3 min)

Learn to manage and track invoices efficiently, keeping a record of all financial transactions in one place.

3

### How to Export Data

(~3 min)

Explore how to export data for reporting and analysis, utilizing Fee Management's export feature to gain valuable insights.

4

### How to Manually Add a Payment or Notation

(~4 min)

Manually add payments or notations and record cash/check payments in Fee Management.

## Advanced Fee Management Features (~9 min)

1

### How to Add a Payment Plan

(~4 min)

Explore how to set up payment plans for parents' convenience, allowing flexible payment options to meet varying needs.

2

### How to Schedule Fee Visibility Dates

(~1 min)

Control when fees are visible to parents and students by setting specific time frames for fee visibility.

3

### How to Add a Tax ID to Receipts

(~2 min)

Add tax IDs to receipts for compliance and proper financial reporting.

4

### How to Add Fee Assignment Alerts

(~2 min)

Set up alerts for specific fee assignments and never miss an important update by receiving timely notifications.

## Additional Resources (~15 min)

### Parent Communication Kit

(in English and Spanish)

Get the word out to your parents that you are using Vanco's products with our communication templates.

### Cashless Campus Checklist

Have you gotten all your school fees in RevTrak? See this checklist for more ideas.

### Common Fall Fees

Prepare for fall with this Fall Fees checklist.

**Say goodbye to cumbersome financial processes** and embrace a streamlined, efficient system with Vanco. For any questions or feedback, feel free to reach out to your dedicated account rep. Together, we will make your financial management experience smooth and hassle-free.

**Thank you for choosing to partner with Vanco.** If you have any additional questions, feel free to get in touch with us here 888.847.9885 or email [service@revtrak.com](mailto:service@revtrak.com).

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