

■ EduKit SMS

Bursar Guide

Fees, payments, receipts, and financial reports

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1. Overview

The Bursar manages all financial transactions in EduKit SMS — setting fees, confirming payments, managing defaulters, and generating financial reports for the principal and proprietor.

2. Setting School Fees

- Go to Finance → Fee Structure.
- Click "Add Fee Item" to add a new fee component (e.g. Tuition, Development Levy, PTA).
- Set the amount per class level (fees can differ by class).
- Set the due date for each term.
- Activate the fee structure for the current term.

■ Fee structures must be approved by the Admin before they become visible to parents.

3. Confirming Payments

3.1 Online Payments (Paystack / Flutterwave)

- Go to Finance → Payments → Online.
- Payments made via Paystack or Flutterwave are automatically confirmed.
- You will receive a notification for each successful payment.
- Click any payment to see the receipt details and student record.

3.2 Bank Transfer Payments

- Go to Finance → Payments → Bank Transfer.
- Parents upload a payment receipt when making a bank transfer.
- Review the receipt image and confirm the bank's actual credit.
- Click "Approve" to mark the payment as confirmed, or "Reject" with a reason.

3.3 Cash Payments

- Go to Finance → Payments → Record Cash.
- Enter the student name or admission number.
- Enter amount received, date, and receipt number.

- Print a receipt for the parent.

4. Managing Defaulters

- Go to Finance → Defaulters to see all students with outstanding fees.
- Filter by class, amount owed, or number of days overdue.
- Send a payment reminder to the parent directly from this page.
- Generate a defaulters list PDF for the principal.

5. Financial Reports

- Finance → Term Summary: total billed, total collected, outstanding balance.
- Finance → Per-Class Report: breakdown of payments and defaulters by class.
- Finance → Student Ledger: full payment history for any individual student.
- Finance → Daily Receipts: all payments recorded today.
- Export any report to PDF or Excel.

6. Receipts and Invoices

- Go to Finance → Receipts to print or email any payment receipt.
- Go to Finance → Invoices to generate a fee invoice for any student.
- Receipts include school logo, date, amount, and payment method.