EduBuddy

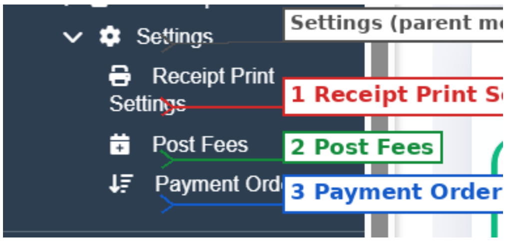
Help & User Guide

Settings Module

Version 1.0 | June 2026 | Fees & Finance Sub-module

Module Overview

The Settings section under Fees & Finance contains three configuration pages that control how receipts are printed, how fees are posted to students, and in what order payments are applied to pending dues.



▲*Figure 1 — Settings section in the sidebar with 3 sub-pages*

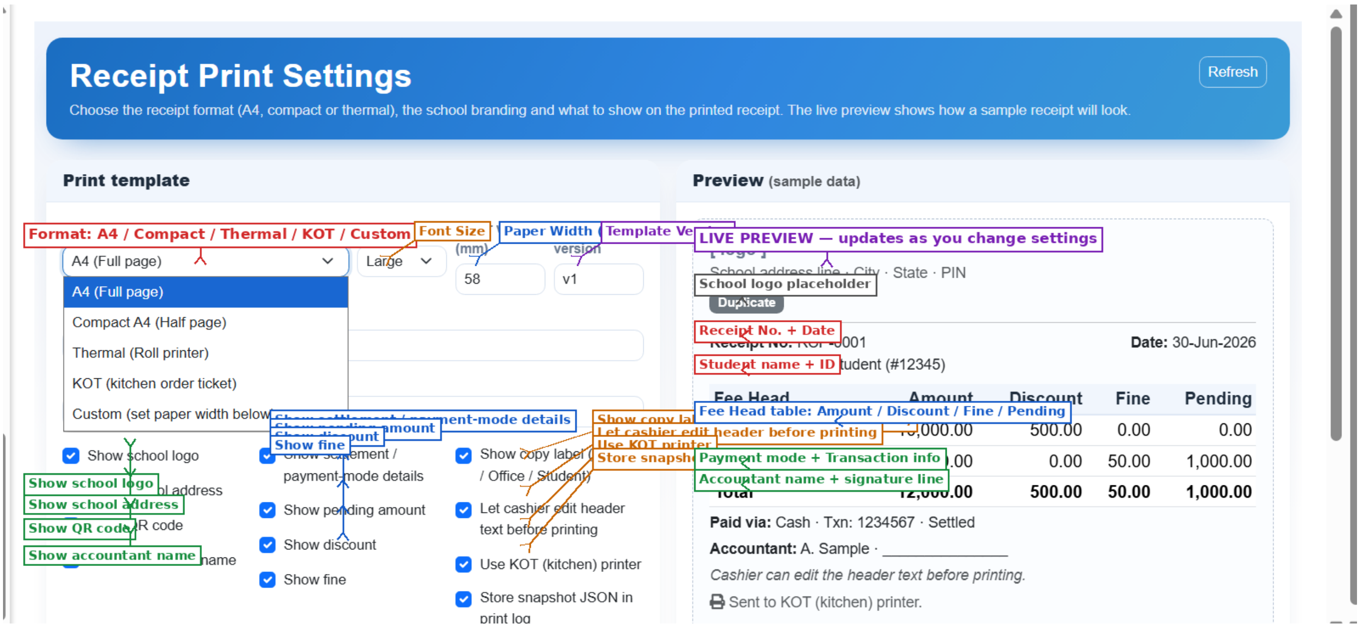
- **Receipt Print Settings:** Customise the format, layout, and content of printed receipts
- **Post Fees:** Charge a fee to many students at once — by class, section, or whole school
- **Payment Order:** Set the order in which payment is applied across different fee items

> ⍰ Changes made in Settings apply to the entire school. Only admin-level users should access these pages.

① Receipt Print Settings

This page controls how printed receipts look — the format, paper size, what information is shown, and a live preview of the output. Any change you make is instantly reflected in the preview on the right.

> ▯ Nothing is saved until you click Save (if available). The live preview shows sample data, not real student data.



▲*Figure 2 — Receipt Print Settings: Format options (top), checkboxes (left), and Live Preview (right)*

Print Template — Format Options

Format	Choose the print layout: A4 Full Page, Compact A4 (half page), Thermal (roll printer), KOT (kitchen order ticket), or Custom (set paper width manually)
Font Size	Large / Medium / Small — controls text size on the printed receipt
Paper Width (mm)	Only relevant for Thermal or Custom format — set the roll width in millimetres
Template Version	v1 is the default template. Change only if EduBuddy has released a newer version for your school

Display Options — Checkboxes

Each checkbox controls whether that field appears on the printed receipt:

Show school logo	Prints the school's logo at the top of the receipt
Show school address	Prints the school's full address line
Show QR code	Adds a QR code to the receipt (links to digital receipt)
Show accountant name	Prints the accountant/staff name at the bottom
Show settlement / payment-mode details	Shows how the payment was settled (Cash, Online, Txn ID, etc.)
Show pending amount	Displays the remaining outstanding balance after this payment
Show discount	Shows any discount applied to the fee
Show fine	Shows any late fine charged on the fee
Show copy label	Prints 'Original', 'Office Copy', or 'Student Copy' label on each copy

Let cashier edit header text	Allows the cashier to modify the header text at the time of printing
Use KOT printer	Sends a copy to a connected KOT / kitchen printer
Store snapshot JSON	Saves a JSON snapshot of the receipt data in the print log for auditing

Live Preview Panel

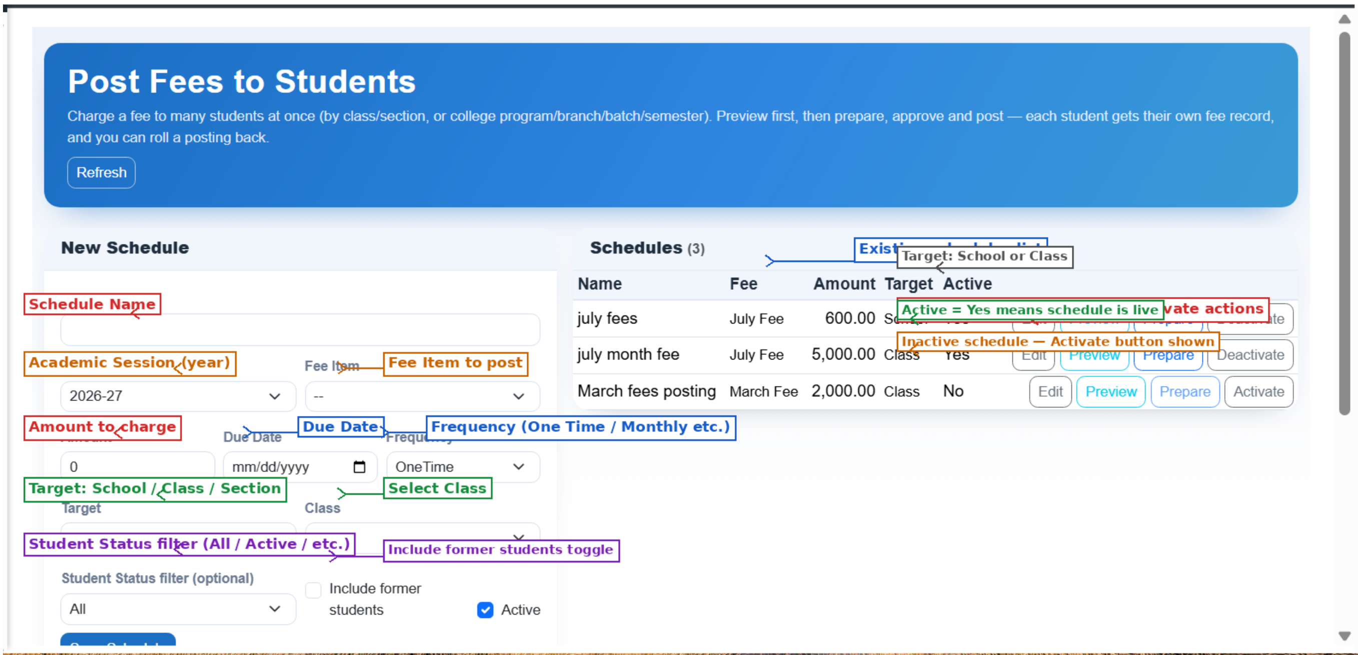
The right side of the page shows a live preview of how the receipt will look with your current settings. It uses sample data (not real student information). The preview updates as you tick or untick checkboxes or change the format.

- Logo placeholder — [logo] shows where the school logo will appear
- Receipt No. and Date — shown at the top of the receipt body
- Student name and ID number
- Fee Head table — shows Amount, Discount, Fine, and Pending for each fee item
- Paid via line — payment mode and transaction reference
- Accountant name and signature line at the bottom

② Post Fees to Students

Post Fees allows you to charge a fee to many students at once — for an entire school, a specific class, or a specific section. You create a schedule (what fee, how much, when), then prepare, preview, approve, and post it.

✓Each student gets their own individual fee record after posting. You can roll back a posting if needed before approving.



▲*Figure 3 — Post Fees: New Schedule form (left) and existing Schedules with actions (right)*

New Schedule Form (Left Side)

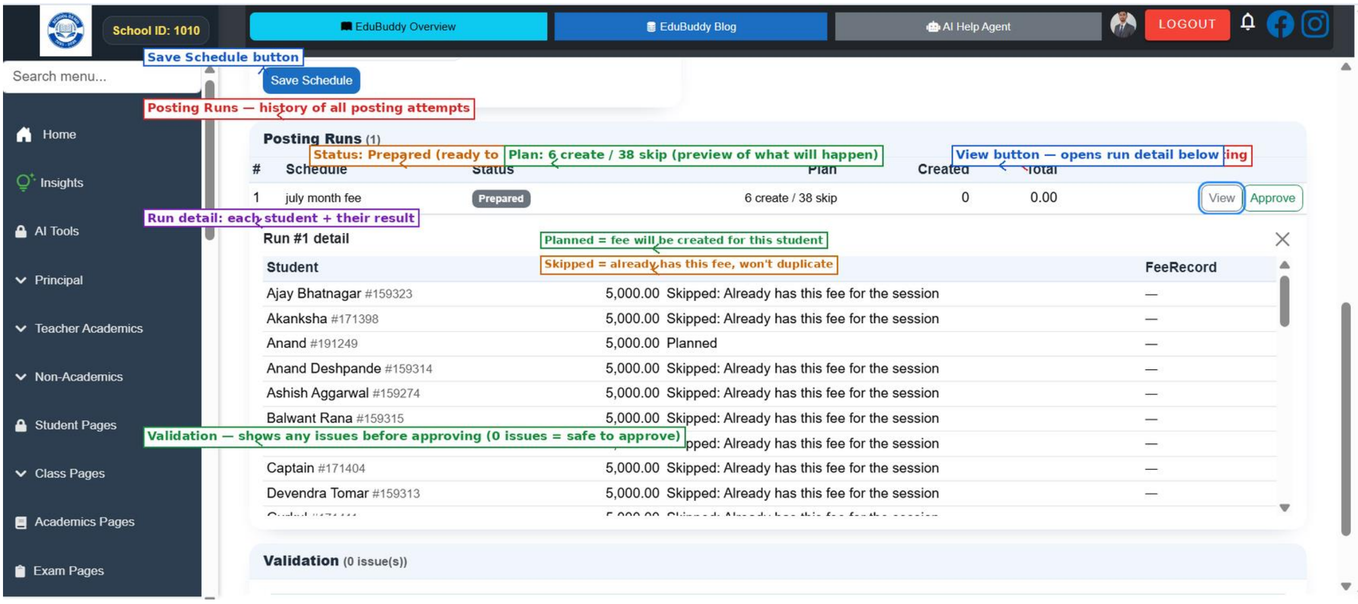
Fill in the form to create a new fee posting schedule:

Name	A label for this schedule (e.g. 'July Fees 2026' or 'Term 1 Transport')
Academic Session	The year this fee belongs to (e.g. 2026-27)
Fee Item	Which fee head to post (Tuition, Transport, Activity Fee, etc.)
Amount	The amount to charge each eligible student
Due Date	The date by which this fee should be paid
Frequency	One Time (single charge) or recurring (Monthly, Quarterly, etc.)
Target	School (all students), Class (specific class), or Section (specific section)
Class	Select the class — visible only when Target is set to Class or Section
Student Status filter	Filter to Active students only, or include Former students as well
Active toggle	Mark this schedule as active so it can be posted

Existing Schedules (Right Side)

All previously created schedules are listed on the right. For each schedule you can:

- **Edit:** Modify the schedule details before posting
- **Preview:** See which students will be affected and what the posting will look like
- **Prepare:** Run the preparation step — the system checks each student and creates a posting plan
- **Deactivate / Activate:** Toggle the schedule on or off



▲*Figure 4 — Posting Run in Prepared state: Run detail shows Planned vs Skipped students, then Approve to finalise*

Posting Runs — After Clicking Prepare

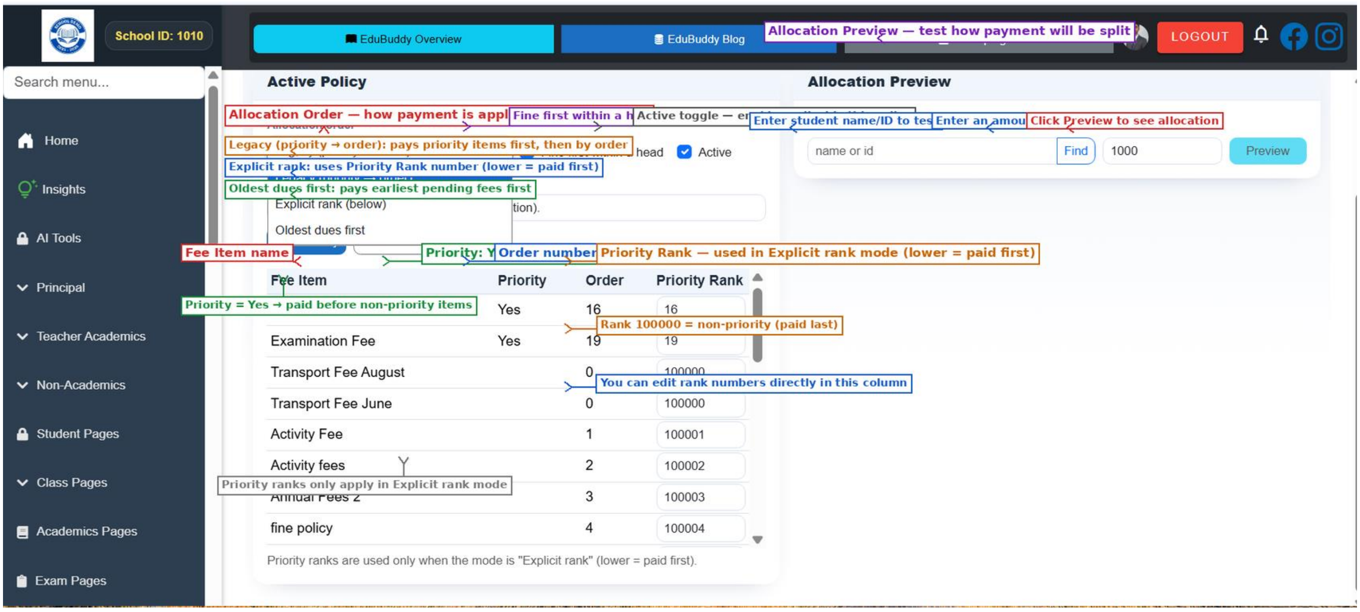
After you click Prepare, a Posting Run is created. It shows exactly what will happen when you approve:

Status: Prepared	The run is ready and waiting for approval — no fees have been posted yet
Plan (e.g. 6 create / 38 skip)	How many students will get the fee (create) vs how many are skipped
Skipped	Students already have this fee for the session — won't be duplicated
Planned	Student will receive the fee record when you approve
Validation (0 issues)	System check passed — safe to approve
View	Opens the full student-by-student detail for this run
Approve	Finalises the posting — each Planned student gets their fee record created

> ⍰ Always click View and review the Planned vs Skipped list before clicking Approve. Once approved, each student's fee record is created immediately.

③ Payment Order

Payment Order controls how a payment is allocated across a student's pending dues when multiple fees are outstanding. You can set which fees get paid first and simulate how a payment will be distributed for any student.



▲*Figure 5 — Payment Order: Allocation Order dropdown (left), Fee Item priority table (centre), and Preview tool (right)*

Active Policy — Allocation Order

Choose how payments are allocated when a student has multiple pending fee items:

Legacy (priority → order)	Fees marked as Priority = Yes are paid first, then remaining fees are paid in their order number. This is the default mode.
Explicit rank	Uses the Priority Rank number in the table below. Lower number = paid first. You control the exact order by editing rank numbers.
Oldest dues first	Pays the oldest unpaid fees before newer ones — useful for clearing long-outstanding dues.
Fine first within a head	When checked, any fine on a fee head is paid before the principal amount of that head.
Active toggle	Enables or disables the current allocation policy for the school.

Fee Item Priority Table

The table lists all fee items and their current priority settings. You can edit these to control payment order:

Fee Item	Name of the fee head (Tuition, Transport, Activity, etc.)
Priority	Yes = this fee is high priority and will be paid before non-priority fees (in Legacy mode)
Order	The sequence number used in Legacy mode when priority is equal
Priority Rank	The rank number used in Explicit rank mode. Lower number = paid first. You can edit this directly in the column.

> ⍰ Priority Rank numbers are only active when the Allocation Order is set to 'Explicit rank'. In Legacy mode, the Priority (Yes/No) and Order columns are used instead.

Allocation Preview — Test Before Saving

The right panel lets you simulate how a payment will be split before changing the policy:

1. Enter a student name or ID in the Student field.
2. Enter an amount to simulate (e.g. 1000).
3. **Click Preview**— the system shows exactly which fee items will be paid, in what order, and how much goes to each.

This is useful for verifying the policy is working as expected before applying it to real payments.

> ✅No payment is collected from the Preview tool. It is a simulation only.

— End of Settings Module Documentation —