



UNIT-e Student Records Tracking Solution (SRTS) Finance Manager

The financial management solution for Further and Higher Education, offering the facility to manage and track student fees in a solution totally integrated with your student management system.

What does it do?

Today, Further and Higher Education institutions run as businesses, supplying products and services to meet market demand. Your institution needs a robust Finance Management solution that can support your strategic goals. Exceptional finance management is now a fundamental business requirement, where every transaction needs to be tracked and accounted for. UNIT-e Finance Manager provides that solution.

UNIT-e Finance Manager

UNIT-e Finance Manager offers colleges the facility to manage and track student fees, associated instalment agreements and outstanding debts from student record details without the need to re-key data.

Finance Manager can receive invoices and receipts from our fast track enrolment processes including tills (to create invoices and receipts) and Online Services (allowing students to enrol and pay by credit card). Both these applications provide seamless links to Finance Manager.

Finance Manager can also cater for bulk invoicing whereby organisations may be invoiced a bulk amount for a quoted number of students.

User definable fee types and fee bands can be defined in order to automate the process of associating simple or complex fee structures down to individual student level. User defined invoices, statements and letters can then be sent to students using mail merge. Fees can be associated with students and there is also the facility to make sponsors responsible for fees relating to student fees.

This association allows debt to be tracked through the organisation and also maintains the link to the student. In this way it is possible to view an organisation's debt either in total or broken down by individual student.

Similarly it is possible to view student debt and also any balance owed for the student on behalf of one or more organisation. UNIT-e Finance Manager can also split the responsibility of any debt over one or more debtors (e.g. student and organisation(s) or multiple organisations).

UNIT-e Financial System Transfer

UNIT-e Finance Manager provides the ability to transfer data to Aptos. We have also recognised that many organisations run student and organisation debt control from within the Sales Ledger or third party applications. We can provide links to the Sales Ledgers of Sun, Dream, and Symmetry. Because of the many possible methods of integration, we can provide bespoke linkages such as summarising transactions before they are imported into the chosen finance system.

Aptos Partnership Solution

Capita ES has joined forces with B-Plan™, linking UNIT-e Finance Manager to Aptos™ whose core attributes include:

- Control financial business processes and increase automation
- Full income management, offering choice and accessibility of differing payment methods
- Manage statutory financial returns & meet audit requirements
- Tailored to suit a college's business processes and branding.
- Provide powerful and flexible reporting tools.



the total education management solution