Rental Fee Reports

Department Leader Documentation · https://docs.dacapoinventory.com/doc/rental-fee-reports/

The **Rental Fee Reports** page provides a summary of instrument rental fees assessed and collected for the current school year, with drill-down detail by building, student, and transaction. This page is used to monitor rental fee balances, record payments, and print receipts.

Purpose of This Page

From this page, you can:

- View rental fee totals by building (assessed vs. collected)
- Drill down into a building to see student-level balances and payment history
- Record payments and update rental fee records when needed
- Print individual receipts or batch-print receipts for multiple students

Building Rental Fee Overview

The **Building Rental Fee Overview** table provides a high-level summary for each building in the district for the selected school year.

Columns

- **Building** – The building name
- **Rental Fees Assessed** – Total fees assessed to students in that building
- **Rental Fees Collected** – Total payments collected for that building
- **See Details** – Opens the building-specific detail view

Using “See Details”

Click **See Details** to jump to the detailed section for that building. The page will scroll to the detailed tables below.

Building Rental Fee Details

After selecting a building, the **Building Rental Fee Details** section shows a student-by-student payment overview, grouped by student and instrument.

What you can review here

- Which students have rental fees assigned
- Total fee assessed for each student/instrument rental
- Total amount paid to date
- Notes related to the fee or payment history

Actions

- **Student Details (green student icon)**
  Opens the student record for additional context.
- **Balance Due (money icon, shown when amount due is greater than $0)**
  Opens the **Record Payment / Update Rental Fee** modal to record a payment or update fee details.

Building Transaction Details

The **Building Transaction Details** table lists individual transactions (assessments and payments) for the selected building.

Columns

- **Student Name / Student ID**
- **Instrument Assigned**

- **Date** – Transaction date
- **Fee** – Fee assessed (if applicable)
- **Amt Paid** – Amount paid (if applicable)
- **Receipt Number** – Receipt reference (when a payment exists)
- **Notes** – Notes and/or payment method details
- **Actions** – Links to student record and receipts

Printing receipts

- **Print a single receipt:**
  Click the receipt icon next to the receipt number.
- **Print multiple receipts (batch):**
  Select rows in the table, then click the **receipt icon** at the top-right (“Print Selected Student Receipts”).
  If no rows are selected, the system will use the currently filtered search results.

Recording a Payment / Updating a Rental Fee

When you click the money icon (for balances due), the system opens the **Record Payment / Update Rental Fee** modal.

From the popup you may:

- Record a payment against a specific student/instrument rental
- Update rental fee information tied to that rental record
- Save changes using the **Update Rental Fee** button

After saving, the building tables will reflect updated totals and balances.

Exporting and Printing Reports

All tables on this page support standard reporting actions:

- Copy

- CSV export
- Excel export
- Print

These tools are available through the DataTable buttons above each table.

Notes and Best Practices

- Use the **Building Overview** table to quickly identify which buildings have outstanding balances.
- Use **Building Rental Fee Details** to focus follow-up efforts by student/instrument.
- Use **Transaction Details** for auditing, receipt retrieval, and payment verification.
- When batch-printing receipts, apply filters first to narrow the list to the correct group.