Trip / Fee Setup

Financials & Trips · https://docs.dacapoinventory.com/doc/trip-setup/

The **Trip / Fee Setup** page allows teachers to create and manage financial items for students. This page can be used for traditional field trips, events, band fees, or other student fees.

Examples include:

- Disney trip
- Spring field trip
- Band camp fee
- Marching band fee
- Uniform fee
- Ensemble fee
- Other student financial obligations

Add or Update a Trip / Fee

Use the **Add / Update a Trip / Fee** form to create a new item or edit an existing one.

Setup Type

Select the type of item you are creating.

Field Trip / Event

Use this for trips, festivals, performances, or events that may involve transportation, chaperones, hotels, meals, tickets, or an itinerary.

Band Fee

Use this for a student fee connected to your music program, such as band camp, marching band, uniforms, supplies, or participation fees.

Other Student Fee

Use this for another student financial obligation that does not fit neatly into the trip or band fee categories.

When you choose a setup type, some labels on the page will adjust automatically. For example, a field trip will use labels such as **Trip Name** and **Trip Date**, while a fee will use labels such as **Fee Name** and **Fee Date**.

Name

Enter the name of the trip, event, or fee.

Examples:

- Disney 2027
- Spring Music Trip
- Band Camp Fee
- Marching Band Fee
- Uniform Fee

Cost Per Student / Fee Amount Per Student

Enter the total amount each student is expected to pay. This amount can later be split across one or more payment due dates.

For example, if the total cost is **$300.00** and you create **3 payment due dates**, Da Capo Inventory can help divide the amount across those due dates.

Cost Per Chaperone / Adult Fee Amount

This field is optional. Use it if adults, chaperones, or other non-student participants have a separate cost.

If this does not apply, you may leave the field blank or enter **0**.

Trip Date / Fee Date

Enter the date of the trip, event, or fee. For a fee that is not tied to a single event date, use the date that makes the most sense for your program, such as the start date, activity date, or general fee date.

Description / Family Explanation

This optional field can be used to explain the purpose of the trip or fee. This is especially helpful when families need additional context about what the fee covers.

Example:

> This fee helps cover the cost of band camp instruction, music, supplies, and staff support.

Additional Teachers Who Can Manage This Trip / Fee

Select any additional teachers who should be able to help manage this item. Co-managers may assist with student rosters, payments, forms, reports, and other enabled sections.

This is useful when multiple teachers share responsibility for the same trip, ensemble, event, or fee.

Payment Due Dates

Use **How many payment due dates** to choose how many payment deadlines you want to track. You may choose up to **9** due dates.

After selecting the number of due dates, enter:

- **Due Date:** The payment deadline.

- **Amount Due on Date:** The amount expected by that deadline.

For new trips or fees, Da Capo Inventory may pre-fill the payment amounts based on the total student cost and the number of due dates selected. You may adjust the payment amounts if your payment schedule is not evenly divided.

Example payment schedule:

Due Date	Amount Due
2027-01-15	$100.00
2027-02-15	$100.00
2027-03-15	$100.00

Forms / Requirements

Use this section to track permission slips, forms, or other requirements connected to the trip or fee.

Depending on the setup type, this section may appear as:

- **Permission Slips / Forms** for field trips or events.
- **Forms / Requirements** for band fees or other student fees.

You may create up to **4** forms or requirements.

Examples:

- Permission Slip
- Medical Form
- Code of Conduct
- Uniform Agreement
- Band Camp Commitment Form

Informational Columns

Informational columns allow you to track additional custom information for students connected to the trip or fee.

You may create up to **3** informational columns. Column names should be short and clear.

Examples:

- Bus
- Room
- Shirt Size
- Group
- Meal

Visible Command Center Modules

The **Visible Command Center Modules** section controls which sections will appear on the Manage Trip / Fee page.

Recommended sections are automatically selected for new items based on the setup type.

Available modules include:

Roster

Manage the students connected to the trip or fee.

Payments

Record and review student payments.

Forms / Requirements

Track forms, permission slips, and other requirements.

Transportation

Track buses, transportation groups, or travel details.

Hotels / Rooms

Track hotel or room assignments.

Tickets / Reservations

Track tickets, reservations, or similar items.

Meals

Track meal choices or meal-related information.

Chaperones

Track adult or chaperone information.

Itinerary

Track schedule or itinerary details.

Tasks

Track tasks connected to the trip or fee.

Reports

View and export reports.

For a field trip or event, sections such as transportation, forms, and reports may be useful. For a band fee or other student fee, you may only need roster, payments, forms, and reports.

Important: If you are editing an existing item and change the setup type, you may choose to apply the recommended sections for the new setup type. Only do this if you want to replace the current visible section selections with the recommended defaults.

Saving the Trip / Fee

When finished, click the appropriate button:

- **Add Trip**
- **Add Band Fee**
- **Add Student Fee**
- **Modify Trip**

- **Modify Band Fee**
- **Modify Student Fee**

The button label will change depending on whether you are creating a new item or modifying an existing one.

Trips / Fees Managed or Co-Managed By You

The lower section of the page lists trips and fees that you created or are allowed to manage.

The table includes:

- **Date:** The trip date or fee date.
- **Name:** The name of the trip, event, or fee.
- **Setup Type:** Field Trip / Event, Band Fee, or Other Student Fee.
- **Due Dates:** The number of payment due dates being tracked.
- **Created By:** The teacher who originally created the item.
- **Actions:** Buttons used to edit, manage, hide, or unhide the item.

Actions

The **Actions** column provides several options.

Edit Setup Details

Use the pencil icon to update the setup details, including the name, cost, date, due dates, forms, informational columns, additional teachers, and visible modules.

Manage Item, Students, and Payments

Use the airplane icon to open the management page for the trip or fee. This is where you manage students, payments, forms, and any enabled command center sections.

Hide Trip / Fee

Use the eye-slash icon to hide an item from most menus and active screens. This is useful for old trips, completed fees, or items you no longer need to see regularly.

Unhide Trip / Fee

If hidden items are being shown, use the eye icon to make a hidden item active again.

Hidden Trips / Fees

Hiding a trip or fee does **not** delete it. It simply removes it from most active menus and screens.

If you have hidden items, a **Show Hidden Trips** button will appear. Click this button to view hidden items. You may then unhide an item if you need to use it again.

Recommended Workflow

1. Select the correct **Setup Type**.
2. Enter the **Name**, **Cost / Fee Amount**, and **Date**.
3. Add a family-friendly explanation in the **Description / Family Explanation** field, if helpful.
4. Select any additional teachers who should be able to manage the item.
5. Choose the number of payment due dates and enter the due date information.
6. Add any forms, permission slips, or requirements that need to be tracked.
7. Add informational columns if you need to track extra student-specific details.
8. Review the visible command center modules.
9. Click the appropriate **Add** or **Modify** button.
10. Use the management button in the table to begin managing students, payments, forms, and reports.