

ROLE GUIDE • ACCOUNTANT

Accountant: start with the learner account.

Know what was billed, what has arrived and what remains.

The screenshot shows the Mwangazza account interface for a learner named Brian Mollet. At the top, the learner's name 'Brian Mollet' is displayed next to a 'BM' icon. Below the name, it says 'Form 1 · Form 1A · MLM-2026-002 · Guardian' and 'Guardian 2 Mlimani · +12025550102'. A 'MWANGAZZA ID: STUD-CS1DOE5F' is also visible. The balance is shown as 'TSh 150,000' with a 'Current' status. There are buttons for 'Statement' and 'Record a payment'. Below this, a navigation bar includes 'Overview', 'Statement', 'Invoices 1', 'Receipts 1', 'Allocations', and 'Audit & notes'. The 'Overview' section shows four key metrics: 'BALANCE TSh 150,000' (1 open charge), 'OVERDUE NOW TSh 150,000' (oldest charge is 8 days past due), 'CREDIT HELD TSh 0' (no credit on account), and 'PAID THIS TERM TSh 150,000' (last on today). At the bottom, there is a section for 'Open charges' with a 'oldest first' sort option.

Brian's part-payment example: TSh 150,000 still outstanding.

01 Find the learner

Open Finance → Accounts. Check the identity and the amount due.

02 Record received money

Use the account's Record a payment action. Enter the amount and method; review the allocation before confirming.

03 Check and document

Confirm the saved payment and remaining balance, then open the receipt or statement.

KEEP THE MONEY TRUTH CLEAR

This workflow records money the school has already received. It does not take money from a parent's phone. After a slow save, check the history before trying again.

Guide basis: S04

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Follow up the right amount.

Clear labels prevent a late balance from being counted twice.

Label	Meaning
Outstanding	Everything unpaid.
Due now	The part due by the relevant date.
Future	The part due later.
Overdue	Already late, and included in Due now.

Brian can owe TSh 150,000 in Outstanding, Due now and Overdue. That is one debt. Daudi's TSh 80,000 transport bill is future money before its due date.

01 Prepare charges for review

A normal Accountant can prepare the charge. The Head Teacher makes the issue decision.

02 Use the actual overdue filter

Work from Accounts → Overdue and read the account behind a summary.

03 Check the document and delivery

A receipt records payment; a statement explains the account. Download does not mean delivery to the parent.

FOLLOW-UP STAYS TRUTHFUL

School communication depends on permissions, plan access and the enabled channel. Do not use an unavailable Send to parent action or imply a reminder was sent when it was only previewed.

Guide basis: S04, S09, S13