



SCHOOL MANAGEMENT SYSTEM

# Elimikasasa

## The Complete User Manual

Every screen in the system, explained step by step — from admitting a learner to closing the term's books. Written for the people who actually run the school office, not for developers.

17 MODULES · 110 GUIDES · 762 STEPS

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# Contents

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|    |                       |           |
|----|-----------------------|-----------|
| 01 | Dashboard & Analytics | 6 guides  |
| 02 | System Settings       | 9 guides  |
| 03 | Students Manager      | 7 guides  |
| 04 | Staff Manager         | 4 guides  |
| 05 | Academic Manager      | 11 guides |
| 06 | TVET & Mock Exams     | 10 guides |
| 07 | Timetable             | 8 guides  |
| 08 | Online Classes        | 2 guides  |
| 09 | Library Manager       | 6 guides  |
| 10 | Finance               | 11 guides |
| 11 | Pocket Money          | 2 guides  |
| 12 | Payroll               | 8 guides  |
| 13 | Inventory             | 8 guides  |
| 14 | Kitchen Manager       | 9 guides  |
| 15 | Transport             | 4 guides  |
| 16 | Communication         | 4 guides  |
| 17 | My Profile            | 1 guide   |

**Why this manual is always current** — It is generated from the same content that powers the in-app Help page and the online user guide. When a screen changes, the guide changes with it, and the next edition of this document follows automatically — there is no second copy to fall out of date.

# Module 01

## Dashboard & Analytics

The dashboard and analytics area gives admins and staff a live snapshot of the school plus six deep-dive, read-only analytics pages covering academics, finance, attendance, automated insights, and cross-school benchmarking. Every page reads directly from your school's data and refreshes when you change the term, year, or class filters.

### 1.1 System Overview (Dashboard)

The landing dashboard for admins and staff. It shows headline school stats, per-module quick stats, fee and gender charts, class fee balances, and recent activity, defaulters, and payments.

- 1 Navigate to Dashboard. The page loads as "School Overview" with a "Welcome back, <name>! Here's what's happening at <school>." greeting. What you see depends on your role (school admin, teacher, accountant, or secretary each get a tailored dashboard).
- 2 Read the four top stat cards: Total Students (with class count), Total Staff (with system user count), Fee Collection (percentage plus KES collected of invoiced), and Attendance Today (present or marked, or "--" if not marked yet).
- 3 Scan the module quick-stat cards below: Library (books, issued, overdue), Transport (vehicles, routes), Inventory (items, low stock, out of stock), and Payroll (runs, latest run status).
- 4 Study the two charts: the "Fee Collection Trend" area chart (monthly collections) and the "Students by Gender" bar chart (Boys vs Girls per form), which also shows Total Boys, Total Girls, Total Students, and Girl:Boy Ratio tiles.
- 5 Review "Cumulative Balances by Class" to see outstanding fee balances per form with a total, then use the three columns below: Recent Activity, Top Fee Defaulters, and Recent Payments (payment mode is colour-badged, e.g. M-Pesa, Cash, Bank, Cheque).
- 6 Check the bottom row cards for Communications (SMS total and this month), E-Learning (classes and homework), and Pocket Money (accounts and total balance).
- 7 Click the "Getting Started" button (top right, with the sparkle icon) at any time to reopen the onboarding checklist.

**Tip** — The dashboard auto-loads on login; if a card shows "--" or "Not marked yet" it means that data (e.g. today's attendance) has not been entered yet, not that it is zero.

**Tip** — Times in Recent Activity are relative ("just now", "5m ago", "2h ago"); older items show a date.

## ■ 1.2 Academic Analytics

Performance insights across subjects, teachers, and students, organised into four tabs: Performance Trends, Subject Analysis, Teacher Performance, and Student Tracking.

- 1 Navigate to Dashboard > Academics. Set the three filters at the top (they stick to the top as you scroll): Term (Term 1/2/3, or Intake for TVET schools), Year, and Form / Class. The first form loads automatically.
- 2 Open the "Performance Trends" tab to read the "Class Performance Over Time" line chart (Class Mean plus student count), "Yearly Progression" (Class Mean, Highest, Lowest across years), and "Subject Trends Across Terms" with per-subject change badges (Improving up, Stable, Declining down).
- 3 Switch to "Subject Analysis" for the "Subject Performance Matrix" heatmap (colour-coded 70+ Good green, 50-69 Average amber, below 50 red) and the "Gender Gap Analysis" bar chart, which flags subjects with a gender gap over 10%.
- 4 Switch to "Teacher Performance" to see "Top 10 Teachers by Value Added" (green bars for gains, red for losses) and the sortable "Teacher Value-Added Details" table (Teacher, Subject, Form, First Exam Mean, Last Exam Mean, Change).
- 5 Switch to "Student Tracking" to read the "Student Trajectories" table (Adm No, Name, Latest, Trend, per-exam scores). Click "Show At-Risk Only" to filter to students with a declining trend (the badge shows how many).
- 6 In the same tab, use "Cohort Tracking": click student name chips to plot their progression over time (up to 8 students at once), then read the line chart that appears.

### FIELDS ON THIS SCREEN

Term / Intake

Year

Form / Class

**Tip** — TVET schools filter by Intake instead of Term 1/2/3; the Term dropdown label changes accordingly.

**Tip** — Green/amber/red colouring is consistent across the page: 70+ is good, 50-69 is average, below 50 needs improvement.

**Tip** — Cohort Tracking is capped at 8 selected students; deselect one before adding another once you hit the limit.

## ■ 1.3 Financial Analytics

Fee collection, cash flow, and expense insights for a chosen term and year, including summary cards, weekly and payment-mode charts, per-class and per-votehead breakdowns, and a searchable default list.

- 1 Navigate to Dashboard > Finance. Choose the Term (or Intake for TVET) and Year from the two dropdowns at the top; the page reloads for that period.
- 2 Read the four summary cards: Total Invoiced, Total Collected (with a collected-percentage badge), Outstanding (red, with an unpaid-percentage badge when over 30%), and Net Revenue (collected minus expenses, green if positive).
- 3 Review the secondary stat row: Per-Student Cost, Total Expenses, Total Students, and a Collection Rate gauge.

- 4 Study the two charts: "Weekly Collection Trend" (area chart by week) and "Payment Mode Distribution" (donut chart with a legend showing each mode's KES total and transaction count).
- 5 Use "Fee Collection by Class" to compare Invoiced, Collected, Outstanding, and a colour-coded Rate bar per class (green 80%+, amber 60-79%, red below 60%).
- 6 Review "Expense Breakdown" (pie chart by category) and the "Votehead Revenue" table; click any column header (Votehead, Invoiced, Collected, Rate) to sort it.
- 7 In "Top Fee Defaulters", type in the "Search student..." box to filter by name, admission number, or class, change the rows-per-page (10/20/30/50), and page through with the arrow buttons.

## FIELDS ON THIS SCREEN

Term / Intake

Year

Defaulter search

Rows per page

**Tip** — The defaulter search matches name, admission number, and class/form simultaneously.

**Tip** — Collection-rate colours (green/amber/red) appear both on the per-class bars and the votehead Rate column, so you can spy weak voteheads at a glance.

## 1.4 Attendance Analytics

Attendance patterns, chronic absenteeism, and early-warning indicators, with summary cards, trend and day-of-week charts, class rates, an attendance-vs-performance scatter, and a risk-filtered absentee table.

- 1 Navigate to Dashboard > Attendance. Set the three filters: Term (or Intake for TVET), Year, and Form (defaults to "All Forms").
- 2 Read the four summary cards: Overall Attendance Rate (colour-coded), Total Days Tracked, Students Below 80% (with an "At risk" badge), and Absent Records.
- 3 Compare the "Weekly Attendance Trend" line chart with the "Day-of-Week Pattern" bar chart; the lowest-attendance day is highlighted red with a note beneath the chart.
- 4 Use "Class Attendance Rates" (horizontal bars) to spot weak classes; bars are green above 90%, amber 80-90%, red below 80%.
- 5 Read the "Attendance-Performance Correlation" scatter plot, where each dot is a student; red dots are the danger zone (attendance below 80% and average marks below 50%), blue dots are everyone else.
- 6 In "Students Requiring Attention", click the risk-level chips (All, Critical, High, Moderate) to filter the absentee table; each chip shows a count. The table lists Name, Admission No, Class, Days Present, Total Days, Attendance Rate, and Risk Level, sorted lowest attendance first.

## FIELDS ON THIS SCREEN

Term / Intake

Year

Form

Risk level filter

**Tip** — Use the correlation scatter to justify interventions: students clustered in the red danger zone are both absent and underperforming.

**Tip** — The absentee table only lists students below the chronic-absentee threshold, so an empty table for a risk level is a good sign.

## ■ 1.5 Automated Insights

AI-generated alerts and recommendations based on your school's data, presented as colour-coded cards you can filter by category and severity.

- 1 Navigate to Dashboard > Insights. Pick the Term (or Intake for TVET) and Year from the dropdowns in the header.
- 2 Use the category tabs to narrow the list: All, Finance, Academic, Attendance, or Operations (which covers payroll, library, and inventory). Each tab shows a live count.
- 3 Use the severity tabs below to further filter: All Severities, Critical, Warning, Info, or Positive; counts update as you combine filters.
- 4 Read each insight card: it shows a category icon, title, severity badge, a plain-language message, the key metric (formatted as KES, a percentage, or a number by type), and a trend badge with the percentage change when relevant.
- 5 Note the left border colour of each card for quick triage: red = critical, amber = warning, blue = info, green = positive. Cards are sorted with critical items first.
- 6 If you see the "No insights to report / Your school is running smoothly!" message, there are no alerts for the current filters and period.

### FIELDS ON THIS SCREEN

Term / Intake

Year

Category filter

Severity filter

**Tip** — Insights are recomputed for the selected term and year, so switch periods to review historical alerts.

**Tip** — Start on the Critical severity tab each term to handle the highest-priority issues first.

## ■ 1.6 Benchmarking

Compares your school's performance against the anonymized Elimika network on enrollment, staffing, fee collection, and attendance, with a detailed comparison table and a fee-collection percentile gauge.

- 1 Navigate to Dashboard > Benchmarking. Select the Term (or Intake for TVET) and Year from the header dropdowns.

- 2 Read the four metric cards: Enrollment, Teacher-Student Ratio, Fee Collection Rate, and Attendance Rate. Each shows your value, an up/down arrow, the network average, and a bar with a marker for the network average (for teacher-student ratio, lower is better).
- 3 Review the "Detailed Comparison" table: each row lists a metric, Your School, Network Avg, and a Status badge (Above Average / Better / Good in green, Below Average / Needs Improvement / Low in red, Moderate in grey).
- 4 Read the "Network Position - Fee Collection" card, which states your percentile in words and plots it on a 0th-to-100th percentile gauge.
- 5 Note the blue info banner at the bottom: benchmarking data is anonymized across all schools and individual school data is never shared.
- 6 If the page shows "No benchmarking data available", data for the chosen term and year has not yet been computed; try another period.

## FIELDS ON THIS SCREEN

Term / Intake

Year

**Tip** — The green bar/arrow means you are ahead of the network on that metric; red means you trail it.

**Tip** — A higher fee-collection percentile means you collect better than more schools on the platform.

# Module 02

## System Settings

Configure your school's identity, classes, user accounts, roles and permissions, database backups, the activity audit trail, third-party integrations (Bulk SMS and M-Pesa), and billing. Most actions in this section are permission-gated, so buttons only appear if your role or user permissions allow them.

### 2.1 School Profile

Update your school's contact details, branding colours, student login-ID suffix, and logo. The school name is locked and can only be changed by support.

- 1 Navigate to System Settings > School Profile.
- 2 Note the blue notice at the top: the School Name field is read-only. To change the school name you must contact support.
- 3 Fill in or update the contact fields: P.O. Box, Telephone, Email Address, and Website.
- 4 Set the Login ID Suffix — the text that appears after 'admno@' in every student login ID. Only letters, digits, dashes and underscores are allowed; leave it blank to default to your school code.
- 5 Under School Colours, pick a Primary Colour and Secondary Colour using the colour swatch or by typing a hex value; watch the live Preview showing the Primary Button, Outline Button, and Badge.
- 6 Click Save Changes to store the details (the button only shows if you have edit permission).
- 7 To change the logo, hover the circular logo and click the camera, or click Change Logo, choose a JPEG, PNG, GIF or WebP image under 2MB, then click Upload (or Cancel to discard the selection).

#### FIELDS ON THIS SCREEN

School Name (read-only) P.O. Box Telephone Email Address Website Login ID Suffix Primary Colour  
Secondary Colour School Logo

**Tip** — The Primary and Secondary colours are applied across the dashboard sidebar, headers, and buttons, so choose colours matching your school branding.

**Tip** — The logo preview updates immediately when you pick a file, but it is not saved until you click Upload.

**Take care** — The school name cannot be edited here — only support can change it.



## ■ 2.2 Classes

Manage class levels and their streams (and, for TVET colleges, departments and programmes). Summary cards show total classes/years, streams/programmes, and total students.

- 1 Navigate to System Settings > Classes.
- 2 Review the summary cards at the top for the count of Classes (or Years for TVET), Streams (or Programmes), and Total Students.
- 3 Click Add Class to open the right-side panel. For a standard school, enter the Class Name (e.g. FORM 1, GRADE 4), the Next Class for promotion, and one or more Streams (use Add Stream to add rows, or the X to remove one).
- 4 Optionally choose a Class Teacher from the staff dropdown, then click Save to create all the streams at once.
- 5 Use the Search box, the 'items per page' selector, and column headers (Form, Stream, Next Class) to find and sort classes.
- 6 Click the pencil icon on a row to edit a class's Form, Stream, Next Class, and Class Teacher, then save.
- 7 To remove classes, click the trash icon on a row (or tick several checkboxes and use Delete Selected in the bulk bar) and confirm in the dialog.
- 8 For TVET schools, use the Departments, Programmes, and Classes tabs to first add departments (Name, HOD, Description), then programmes (Department, Name, Short Name, Level, KNQF Level, Duration), then classes by selecting a Programme and a Year / Module / Intake.

### FIELDS ON THIS SCREEN

Class Name   Next Class (for promotion)   Streams   Class Teacher (optional)

Department Name / HOD / Description (TVET)   Programme Name / Short Name / Level / KNQF Level / Duration (TVET)

Programme + Year / Module / Intake (TVET)

**Tip** — The 'Next Class' value is used when promoting students to the following level (set it to ALUMNI for the final class).

**Tip** — You can create multiple streams for one class in a single Add Class action — each stream shares the same class name and next class.

**Tip** — For TVET, you can add a brand-new intake on the fly by choosing 'Add new intake...' and typing a name like 'JUNE 2026 INTAKE'.

**Take care** — Deleting a class or stream is permanent and cannot be undone; deleting classes that still have students can leave those students unassigned. Bulk delete removes every selected class.

## ■ 2.3 User Management

Create login accounts for existing staff, edit account details, manage each user's granular permissions, and deactivate accounts. Summary cards show Total, Active, and Inactive users.

- 1 Navigate to System Settings > User Management.
- 2 Review the Total Users, Active Users, and Inactive Users summary cards; use the search box (by name, email, role, or staff ID) and the pagination controls to browse.
- 3 Click Add User to open the panel, select a Staff Member (only staff without accounts appear), choose a Role, optionally add Email and Phone, set a Password (minimum 4 characters), then click Create User.
- 4 Click the pencil icon on a row to edit a user's Email, Phone, and Account Status (an Active toggle controlling whether they can log in), then Save Changes.
- 5 Click the shield icon to open Manage Permissions: change the user's Role (which resets permissions to that role's defaults) and tick individual module/action checkboxes, then click Save Permissions.
- 6 Click the deactivate (UserX) icon on an active user, then confirm in the Deactivate User dialog to block them from logging in.

### FIELDS ON THIS SCREEN

Staff Member

Role

Email (optional)

Phone (optional)

Password

Account Status (Active toggle)

Permissions matrix

**Tip** — Accounts are always created for an existing staff member — add the person under Staff first if they are not in the Staff Member dropdown.

**Tip** — The super\_admin role cannot be assigned to other users from this screen; roles are grouped into System Roles and Custom Roles in the dropdown.

**Tip** — You cannot change your own role — the system blocks it to prevent locking yourself out; ask another administrator to do it.

**Take care** — Deactivating a user immediately prevents them from logging in. Changing a user's role resets all their permissions to that role's defaults, discarding any custom per-user permissions.

## ■ 2.4 Roles & Permissions

Define what each role can do across every module. A left panel lists System and Custom roles; the right panel is a collapsible permission matrix with View/Create/Edit/Delete checkboxes per sub-module.

- 1 Navigate to System Settings > Roles & Permissions.
- 2 Select a role from the left panel (System Roles are locked by default; Custom Roles are fully editable). The right panel shows its permission count and matrix.

- 3 By default System role permissions are read-only — click Customize Permissions (top right) to make them editable for your school; the roles list then shows a 'Customized' badge.
- 4 In the matrix, expand modules and tick View, Create, Edit, or Delete per sub-module, or use the module/sub-module 'All' checkboxes; use Expand All / Collapse All to navigate.
- 5 Click Save Permissions to store your changes (the button is disabled until you make a change).
- 6 Click Create Role to add a new custom role by name, or select a role and use Duplicate to copy it with all its permissions; use Edit to rename a custom role.
- 7 To remove a custom role, select it and click the trash icon, then confirm in the Delete Role dialog.
- 8 If you previously customized permissions, use Reset to Defaults (top right) and confirm to discard all customizations and revert to the global system defaults.

## FIELDS ON THIS SCREEN

Role Name

Permission matrix (View / Create / Edit / Delete per sub-module)

**Tip** — Admin roles always have full, unrestricted access and their matrix is not editable.

**Tip** — If you want a system-like role you can tweak, Duplicate a system role instead of customizing all of them — the copy becomes a fully editable Custom Role.

**Tip** — Switching to another role while you have unsaved permission changes prompts a confirmation before discarding them.

**Take care** — Deleting a role cannot be undone. Reset to Defaults permanently discards ALL permission customizations for every role and cannot be undone.

**Take care** — Editing role permissions changes access for every user assigned to that role at once.

## ■ 2.5 Database Backup

View and download database backups and configure automated backups. The page has a Backup History table on the left and a Backup Settings panel on the right.

- 1 Navigate to System Settings > Database Backup.
- 2 In Backup History, review each backup's File Name, Backup Date, Size, and Status; the header shows how many backups exist and their total size. Click Refresh to reload the list.
- 3 Click the download icon on any backup row to save that .sql/.gz file to your computer.
- 4 In the Backup Settings panel, toggle Automatic Backup on or off and choose a Backup Frequency (Daily, Weekly, or Monthly).

- 5 Set Retention — Keep 3, 5, or 10 latest backups; the oldest automatic copies beyond this limit are deleted automatically.
- 6 Under Manual Backup, click Start to create a backup immediately; it appears in the history when done.
- 7 Check the summary at the bottom for Last Backup, Next Backup, and the active Retention rule.
- 8 To remove a backup, click the trash icon on its row and confirm in the Delete Backup dialog.

## FIELDS ON THIS SCREEN

Automatic Backup (toggle)

Backup Frequency (Daily / Weekly / Monthly)

Retention (Keep 3 / 5 / 10 latest)

**Tip** — One backup per month is always kept as a monthly 'source of truth' copy regardless of the retention limit — those rows are tagged with a 'monthly' badge.

**Tip** — Automated backups follow a FIFO rule: once you exceed the retention count, the oldest non-monthly copy is auto-deleted.

**Tip** — Download an important backup to your own storage before making major data changes so you always have an off-site copy.

**Take care** — Deleting a backup cannot be undone. Deleting a monthly source-of-truth backup removes that month's protected copy — the dialog warns you specifically when the file is a monthly backup.

## 2.6 System Audit

A searchable, filterable audit trail of every system activity: logins, page views, data changes, exports, and more. Summary cards show total records, today's activity, unique users, and last activity.

- 1 Navigate to System Settings > System Audit.
- 2 Review the summary cards: Total Records, Today's Activity, Unique Users, and Last Activity.
- 3 Use the Search box (activity, user, or IP) and the Category, Module, and User dropdown filters to narrow the log.
- 4 Set a From date and To date to restrict entries to a period; adjust 'items per page' as needed.
- 5 Click any column header (Date, Activity, Category, Module, User) to sort ascending/descending.
- 6 Click Clear to reset all active filters, and use the Previous/Next controls to page through results.
- 7 Click Export CSV (top right) to download the currently-filtered entries (up to 5,000 rows) as a CSV file.

## FIELDS ON THIS SCREEN

Search

Category

Module

User

From date

To date

**Tip** — Category colour badges make it easy to spot sensitive actions such as Delete (red), Update (amber), and Export (purple).

**Tip** — Filters and sorting are applied together, so combine a Module, a User, and a date range to trace a specific person's actions.

**Tip** — The audit trail is read-only — entries are generated automatically and cannot be edited or removed here.

## ■ 2.7 Integrations — Bulk SMS

The Integrations page has left-side vertical tabs (Bulk SMS and M-Pesa). The Bulk SMS tab configures your SMS gateway provider, sender ID, and credentials, and shows your remaining SMS balance.

- 1 Navigate to System Settings > Integrations, then select the Bulk SMS tab on the left.
- 2 In SMS Provider Configuration, choose your Provider (e.g. Advanta, Africa's Talking, or the default gateway).
- 3 Enter the Sender ID / Shortcode (Sender Name) — the name recipients see; for Africa's Talking you may leave it blank to use the shared shortcode.
- 4 Set the API URL if required (Advanta and Africa's Talking use fixed URLs, so this can be left empty for them).
- 5 Enter the provider credentials: API Key and Password for generic gateways; Advanta API Key + Partner ID for Advanta; or Username + API Key for Africa's Talking (use 'sandbox' as the username for testing).
- 6 Click Save Settings to store the configuration (only visible with SMS edit permission).
- 7 Check the SMS Balance card for credits remaining; for Advanta and Africa's Talking click the refresh icon to fetch the live balance from the provider.

### FIELDS ON THIS SCREEN

Provider

Sender ID / Shortcode

API URL

API Key

Password

Advanta API Key

Partner ID

Africa's Talking Username

Africa's Talking API Key

**Tip** — The balance auto-refreshes after each send for Advanta and Africa's Talking; a red 'Low balance' badge appears when 10 or fewer credits remain.

**Tip** — Use the eye icon to reveal masked credentials while typing to confirm you entered them correctly.

**Tip** — To buy more SMS credits through the app, use System Settings > Billing & Payments > SMS Top-up rather than this page.

**Take care** — SMS credentials are live keys — entering the wrong provider values will silently break message delivery, so verify with a test send after saving.

## ■ 2.8 Integrations — M-Pesa Daraja

The M-Pesa tab of the Integrations page lets each school register its OWN Safaricom Daraja credentials and callback URLs so fee payments flow into its account. Includes Test Connection, Register Callback URLs, and Test STK Push, plus a step-by-step Setup Guide.

- 1 Navigate to System Settings > Integrations, then select the M-Pesa tab on the left.
- 2 Choose the Environment: Sandbox (Testing) while you set up, or Production (Live) once you are ready to accept real payments.
- 3 Select the Shortcode Type (Paybill Number or Till Number) and enter your Paybill / Till Number.
- 4 Choose the Account Reference Format (Admission Number or Parent Phone Number) — how parents identify the student when paying via Paybill.
- 5 Enter your own Daraja credentials from your Safaricom Daraja app: Consumer Key, Consumer Secret, and the Passkey (needed for STK Push).
- 6 Click Save Settings, then Test Connection to verify the credentials are valid.
- 7 Click Register Callback URLs so Safaricom sends payment notifications to your school — once done, a green banner confirms payments to your Paybill/Till will appear automatically.
- 8 Optionally click Test STK Push to send a payment prompt to a phone (in Sandbox use the test number 254708374149), enter the phone and amount, and click Send Prompt.
- 9 Follow the blue Setup Guide card at the bottom if you are configuring M-Pesa for the first time.

### FIELDS ON THIS SCREEN

Environment (Sandbox / Production)

Shortcode Type (Paybill / Till)

Paybill / Till Number

Account Reference Format

Consumer Key

Consumer Secret

Passkey (for STK Push)

**Tip** — Each school registers its OWN Daraja credentials and callback URLs — these are per-school and are not shared across tenants.

**Tip** — Do all initial testing in Sandbox with the test number, then switch to Production only when everything works.

**Tip** — Test Connection and STK Push are only enabled once the required fields (shortcode, consumer key, and passkey for STK) are filled in.

**Take care** — Enter LIVE consumer key, secret, and passkey only when the Environment is set to Production. Registering callback URLs points Safaricom's real notifications at your school, so double-check the shortcode and credentials before going live.

**Take care** — M-Pesa credentials are sensitive — treat the Consumer Secret and Passkey like passwords.

## ■ 2.9 Billing & Subscription

Renew the school's subscription, top up SMS credits, and review payment history. Only the Headteacher, Accountant, Secretary, or Super user can make payments; other roles see a restricted notice. Payments are processed securely via Paystack (M-Pesa, card, or bank transfer).

- 1 Navigate to System Settings > Billing & Payments.
- 2 On the Subscription tab, review the Current subscription card showing Status, Ends date, and Days remaining.
- 3 Choose a plan — Premium Monthly (KES 2,500 / month) or Premium Annual (KES 20,000 / year, marked 'Best value').
- 4 If you have a discount code (annual plan only), type it under 'Have a discount code?' and click Apply; the discounted net price and 'off' amount show once it validates.
- 5 Click the Pay button on the chosen plan, review the confirmation dialog (product, amount, school), and complete payment in the Paystack window.
- 6 Switch to the SMS Top-up tab to buy credits: pick a Quick pack (500 / 1,000 / 2,000 / 5,000 SMS at KES 1 each) or enter a Custom amount (KES 100 to 100,000), then click Pay.
- 7 Open the Payment History tab to see all subscription and top-up payments (Date, Item, Amount, SMS Units, Method, Status, Reference); click Refresh to reload.

### FIELDS ON THIS SCREEN

Plan (Premium Monthly / Premium Annual)

Discount code (annual only)

SMS quick pack

Custom SMS units

**Tip** — 1 SMS = KES 1 and credits never expire; after payment they appear in your account within seconds.

**Tip** — Discount codes only apply to the Premium Annual plan and reduce the amount charged before Paystack.

**Tip** — Payment History status badges show success, pending, failed, or abandoned so you can confirm a payment went through.

**Take care** — Only Headteacher, Accountant, Secretary, or Super users can make payments — other roles must ask one of them to renew or top up.

# Module 03

## Students Manager

Admit, edit and manage students; transfer them out and re-admit; view alumni; generate class lists; mark daily attendance and run attendance reports; and print student ID cards.

### 3.1 Students List

The main roster of active students. Admit new students, edit records, view full profiles, upload photos, export lists, and remove (transfer out) students.

- 1 Navigate to Students Manager > Students List. Summary cards show totals, boarding/day split and a per-class breakdown above the table.
- 2 Use the toolbar to narrow the roster: type in 'Search name, admission no, NEMIS...', or pick from 'All Classes', 'All Gender' and the category dropdown; press Clear to reset all filters.
- 3 Click 'Admit Student' (top right) to open the 'Admit New Student' side sheet, fill in the Student Details and Parent / Guardian Details sections, then click 'Admit Student' at the bottom.
- 4 Click a student's admission number or name (or the eye/View details icon) to open their profile sheet with Personal, Academic, Parent / Guardian and Library tabs.
- 5 From a row's action icons use the pencil to Edit, the file icon for a Leaving Certificate (non-TVET), and the eye to view; inside the profile sheet you can also hover the photo to Upload/Change/Remove Photo.
- 6 To export, click 'CSV', 'PDF', or 'KEMIS Export' (learner register with UPI, birth certificate, parent IDs and special-needs codes); use 'Import' for bulk upload and 'Photos' for bulk photo upload.
- 7 To transfer a student out, click the trash icon (or 'Remove' in the profile sheet) and confirm in the 'Remove Student' dialog; the student is marked as transferred, not deleted.
- 8 To remove several at once, tick the checkboxes, then in the bulk bar click 'Remove Selected' and confirm the 'Remove N Students?' dialog.

#### FIELDS ON THIS SCREEN

Admission No (required) UPI (KEMIS / NEMIS No) Admission Code Assessment No

Pathway (secondary: STEM / Social Sciences / Arts and Sports) First Name (required) Middle Name

Surname (required) Gender (required) Date of Birth Date of Admission Birth Certificate Entry No Citizenship

Home County Special Needs (KNEC code) Religion Class (required) Stream

Category (required: Day / Boarding) KCPE / Entry Marks KJSEA Points Previous School House

Transport Route / Drop-off Stop / Transport Mode Father's Name / Phone / National ID / Email

Mother's Name / Phone / National ID / Email Address

**Tip** — Removing a student is reversible: they move to the Transferred List where you can re-admit them.



**Tip** — Click the sortable 'Adm No' and 'Name' column headers to sort the table.

**Tip** — The student photo you upload here appears on ID cards and report forms.

**Tip** — Field labels adapt to the school type (e.g. Course/Intake/Sponsorship for TVET institutions).

**Take care** — Removing a student marks them as transferred; the app requires you to confirm in a dialog before it happens. Reverse it from the Transferred List.

**Take care** — Bulk 'Remove Selected' transfers every ticked student at once after a confirmation dialog.

## ■ 3.2 Transferred List

Students who have been removed or transferred out. Re-admit them back to their original class or permanently delete their records.

- 1 Navigate to Students Manager > Transferred List. A 'Total Transferred' card shows the count.
- 2 Use the search box ('Search name, admission no...') and the page-size selector to find records.
- 3 Click a row to open the detail sheet with Personal, Academic and Parent / Guardian tabs.
- 4 To bring a student back, click 'Re-admit' on the row and confirm the 'Re-admit Student' dialog; they are restored to their original class.
- 5 To permanently remove a student, click the delete action and confirm the 'Permanently Delete Student' dialog.
- 6 To act on many at once, select rows and use the bulk 'Re-admit' or 'Permanently Delete' action, then confirm the summary dialog.
- 7 Export the transferred list with the 'CSV' or 'PDF' buttons in the toolbar.

**Tip** — Re-admitting returns the student to the active Students List at their original form/class.

**Tip** — Use bulk re-admit to reinstate a whole cohort that was transferred by mistake.

**Take care** — 'Permanently Delete Student' cannot be undone - it removes the student and all related records (parent details, login accounts). The app requires confirmation in a dialog first.

## ■ 3.3 Class List

Generate, print and export a class register filtered by class/stream, gender and pathway.

- 1 Navigate to Students Manager > Class List.

- 2 In the left Filters panel choose the Class (Course for TVET) and Stream (Intake for TVET); both are required.
- 3 Optionally set Gender (All Students / Girls Only / Boys Only / Entire) and, for secondary schools, a Pathway (STEM / Social Sciences / Arts and Sports).
- 4 Click 'Get Class List' to load the students into the results table on the right.
- 5 Use the 'Search students...' box to filter the loaded list, and the 'Show ... items per page' selector plus Previous/Next to page through results.
- 6 Click the 'Admno' or 'Full Name' column headers to sort ascending/descending.
- 7 Click 'Print' to download a PDF class list, or 'CSV' to export a spreadsheet.

## FIELDS ON THIS SCREEN

Class / Course (required)

Stream / Intake (required)

Gender

Pathway (secondary only)

**Tip** — The NEMIS UPI column appears for non-TVET schools; a Pathway column appears for secondary schools.

**Tip** — The printed PDF header reflects the exact class, stream and gender filters you selected.

### ■ 3.4 Alumni List

Former students who have completed their studies. View profiles, print leaving certificates and export the alumni list.

- 1 Navigate to Students Manager > Alumni List (Former Students / Alumni).
- 2 Use the 'Search name, admission no, NEMIS...' box and page-size selector to find records.
- 3 Click the 'Adm No' or 'Name' headers to sort the list.
- 4 Click a row (or the eye/View details icon) to open the profile sheet with Personal, Academic and Parent / Guardian tabs.
- 5 Click the leaving-certificate icon on a row to generate that student's leaving certificate.
- 6 Export the full alumni list with the 'CSV' or 'PDF' toolbar buttons.

**Tip** — The Alumni List holds students marked as having completed their studies, separate from the Transferred List.

### ■ 3.5 Attendance Sheet

Mark daily student attendance for a class, stream and date using per-student present/absent toggles.

- 1 Navigate to Students Manager > Attendance Sheet.
- 2 Select the Form/Class (required) and, optionally, a Stream from the filter bar.
- 3 Pick the Date using the calendar picker (defaults to today).

- 4 Click 'Load Students' to bring up the class roster; every student defaults to Present.
- 5 Flip each student's toggle switch to set Present or Absent, or use 'Mark All Present' / 'Mark All Absent' for the whole class.
- 6 Check the running Present, Absent and Unmarked count badges at the bottom of the table.
- 7 Click 'Save Attendance' to record the day's register; a success toast confirms it saved.

## FIELDS ON THIS SCREEN

Form / Class (required)

Stream

Date

**Tip** — You can reload a past date to review or correct attendance already marked for that day.

**Tip** — The Present/Absent toggle only appears if you have edit permission for the attendance sheet.

### ■ 3.6 Attendance Report

View a color-coded grid of student attendance across a date range and download it as a PDF.

- 1 Navigate to Students Manager > Attendance Report.
- 2 Select the Class (required) and, optionally, a Stream.
- 3 Set the From and To dates with the two calendar pickers (defaults to the last 7 days).
- 4 Click 'Generate' to build the report.
- 5 Read the grid: each day column shows a green 'P' (present), red 'A' (absent) or '-' (no record); the P and A columns total each student, and the footer shows the daily present/total.
- 6 Click 'PDF' to download the report as a printable file.

## FIELDS ON THIS SCREEN

Class (required)

Stream

From date

To date

**Tip** — Widen the date range to spot recurring absentees across a term.

**Tip** — The report only fills in days that were actually marked on the Attendance Sheet.

### ■ 3.7 ID Cards

Select students by class and generate printable student ID cards (front and back) as a PDF.

- 1 Navigate to Students Manager > ID Cards.
- 2 Choose the Form/Class and, optionally, a Stream from the filter row.

- 3 Click 'Load Students' to list the students in that class.
- 4 Tick the checkbox on each student you want a card for, or use the header checkbox to Select All.
- 5 Confirm the selected count shown in the toolbar badge.
- 6 Click 'Generate ID Cards' to download a PDF of the cards (front and back) for the selected students.

**Tip** — Upload student photos on the Students List first so faces appear on the printed cards.

**Tip** — You can select across the whole loaded class (up to 500 students) before generating.

# Module 04

## Staff Manager

Add and manage staff members (with a cross-school ID guard), edit personal, employment and statutory details, mark staff attendance and run reports, and manage staff who have left.

### ■ 4.1 Staff List

The roster of active staff. Add and edit staff records, view full profiles, export the list, and remove staff who leave.

- 1 Navigate to Staff Manager > Staff List.
- 2 Filter the roster with 'Search name, ID, email...', the 'All Roles', 'All Gender' and 'All Employment' dropdowns, or press Clear to reset.
- 3 Click 'Add Staff' to open the 'Add New Staff' side sheet, complete the Personal Details and employment fields, then submit.
- 4 Click a staff row to open the profile sheet with Personal, Employment and Statutory tabs.
- 5 Use the pencil action to open 'Edit Staff' and update any details; note that changing the ID/Passport No also updates that person's login.
- 6 Export the staff list using the 'CSV' or 'PDF' toolbar buttons.
- 7 To remove someone who has left, use the delete action and confirm the 'Remove Staff Member' dialog; they are marked as transferred and moved to Former Staff.
- 8 Sort by clicking the 'ID/Passport' column header.

#### FIELDS ON THIS SCREEN

First Name (required) Middle Name Last Name (required) Gender (required) ID/Passport No (required)  
 Telephone Email Address Estate System Access Role (required) Staff/TSC No Employment Type  
 Qualification KRA PIN NSSF NHIF Basic Salary

**Tip** — System Access Role controls which parts of the app the staff member can use once they log in.

**Tip** — Removed staff are not deleted - find and restore them under Former Staff.

**Take care** — Cross-school ID guard: if the ID/Passport number you enter is already active at another school, adding is blocked and an error message appears (contact support to resolve) - the same person cannot be active at two schools at once.

**Take care** — Removing a staff member marks them as transferred; the app requires confirmation in a dialog first.

## ■ 4.2 Attendance Sheet

Mark daily staff attendance by category and date using per-staff present/absent toggles.

- 1 Navigate to Staff Manager > Attendance Sheet.
- 2 Optionally pick a staff Category (leave as '-- All Staff --' for everyone).
- 3 Choose the Date with the calendar picker (defaults to today).
- 4 Click 'Load Staff' to list the staff members.
- 5 Toggle each person Present or Absent, or use 'Mark All Present' / 'Mark All Absent'.
- 6 Review the Present and Absent count badges, then click 'Save Attendance' to record the day.

### FIELDS ON THIS SCREEN

Category

Date

**Tip** — Reload an earlier date to review or amend attendance already saved for that day.

## ■ 4.3 Attendance Report

View color-coded staff attendance across a date range and download it as a PDF.

- 1 Navigate to Staff Manager > Attendance Report.
- 2 Optionally choose a staff Category (default '-- All Staff --').
- 3 Set the From and To dates with the calendar pickers (defaults to the last 7 days).
- 4 Click 'Generate' to build the report grid.
- 5 Read the per-day Present/Absent marks and the daily totals in the footer.
- 6 Click the PDF/Download button to save the report.

### FIELDS ON THIS SCREEN

Category

From date

To date

**Tip** — The report reflects only days that were marked on the staff Attendance Sheet.

## ■ 4.4 Former Staff

Staff members who have been removed or transferred out. Restore them to active staff or permanently delete their records.

- 1 Navigate to Staff Manager > Former Staff.

- 2 Use 'Search by name or ID...' to find a record; the table shows ID/Passport, Name, Gender, Date Left, Phone and Email.
- 3 To reinstate someone, click 'Restore' on their row and confirm the 'Restore Staff Member' dialog; they return to the active Staff List.
- 4 To remove a record for good, click 'Delete' and confirm the 'Permanently Delete Staff Member' dialog.
- 5 A success toast confirms whether the staff member was restored or deleted.

**Tip** — Restoring adds the staff member back to the active roster with their existing details.

**Take care** — 'Permanently Delete Staff Member' cannot be undone; the app requires confirmation in a dialog before removing the record.

# Module 05

## Academic Manager

The complete exams and marks workflow: set up terms, subjects, grading and class-teacher allocations in Dean Settings; define exams and their weighting in Exam Settings; tell the system what each subject is marked out of in Set Marks; allocate which students sit which subject in Subject Allocation; enter and edit student marks; track which teachers have submitted; and finally generate analysis, report cards, spreadsheets and KNEC CBA (SBA) registers. Work through the sub-pages roughly in the order below — later steps depend on the setup done in earlier ones.

### ■ 5.1 Dean Settings

The foundation tab set for the academic year: define academic terms, build each class's subject list, allocate subjects to teachers, and promote students to the next class. Everything else in Academic Manager depends on the terms and subjects created here.

- 1 Navigate to Academic Manager > Dean Settings. The page opens with four tabs: Terms, Subjects, Teacher Allocation, and Promote.
- 2 On the Terms tab, click 'Add Term', choose the Term (Term 1 / Term 2 / Term 3), type the Year (e.g. 2026), pick a Start Date and End Date, then click 'Add Term' to save. Use the Pencil icon to edit or the Trash icon to delete a term.
- 3 Open the Subjects tab and pick a class from the left panel. Click 'Add Row' (or 'Add Subject' for an empty class) to add each subject: type the Subject Name, choose a Category, and for secondary/combined schools set a Pathway (All, STEM, Social Sciences, or Arts & Sports).
- 4 Click 'Save Changes' to commit all new, changed and deleted subject rows at once. To reuse a class's subjects, click 'Copy to Classes', tick the target classes and confirm — this appends the subjects to those classes.
- 5 Open the Teacher Allocation tab, select a Form then a Stream. Click 'Allocate New', pick a teacher from the searchable dropdown (initials auto-fill), tick the Subjects that teacher will teach, optionally tick other streams, then click the Allocate button.
- 6 To change an existing allocation, click the teacher in the sidebar, adjust the ticked subjects and save; use 'Remove Teacher' to clear all their allocations in that form/stream (confirm in the dialog).
- 7 Open the Promote tab to preview how each stream maps to its next class, then click 'Promote All' and confirm to move every student up one class.

#### FIELDS ON THIS SCREEN

Tabs: Terms, Subjects, Teacher Allocation, Promote

Term modal: Term (1/2/3), Year, Start Date, End Date

Subject row: Subject Name, Category, Pathway (All / STEM / Social Sciences / Arts & Sports)

Allocation: Form, Stream, Teacher, Initials, Subjects checklist, Also allocate to other streams



**Tip** — Create your terms first — the Year and Term dropdowns on every other Academic Manager page are populated from the terms defined here.

**Tip** — A green check-count badge next to a class (Subjects tab) or subject means it is already configured; an outline zero badge means nothing is set yet.

**Tip** — Only teaching-category staff (teacher, headteacher, principal, deputy, dean) appear in the Teacher Allocation picker.

**Tip** — If a subject is already assigned to another teacher it is flagged inline with that teacher's name — re-ticking it reassigns the subject.

**Take care** — 'Promote All' moves every student to their next class and warns it cannot be easily undone — verify the preview counts before confirming.

**Take care** — Removing a teacher deletes all of that teacher's subject allocations for the selected form and stream.

## ■ 5.2 Exam Settings

Define the exams the school runs each term, build the grading scales (8-4-4, KJSEA, CBC, KNEC TVET or CBET), and set how many subjects each student is doing. Exams created here are what teachers select when recording marks and generating report cards.

- 1 Navigate to Academic Manager > Exam Settings. The page has three tabs: Exams, Grades, and Subjects Done.
- 2 On the Exams tab, click 'Add Exam', enter the Exam Name (e.g. Mid Term, End Term, CAT 1), choose the Term, enter the Year, and optionally set 'Out Of' (what each paper is marked out of) and 'Percentage' (its weight when a report card combines several exams). Click 'Add Exam'.
- 3 Open the Grades tab, pick a Form (and Stream for TVET), then pick a subject. If no grades exist, click a template button (e.g. 8.4.4 (12), KJSEA (8), CBC (4), KNEC TVET (7), CBET (4)) to quick-fill the grade rows.
- 4 Adjust the Grade, Min, Max, Points and Remarks rows as needed, then click 'Save Changes'.
- 5 To set up many subjects at once, click 'Bulk Setup', choose the grading system and edit the template, tick the subjects to apply it to, then click 'Apply to N Subjects'. Use 'Copy to Others' to clone one subject's scale to others.
- 6 Open the Subjects Done tab, select the Form, Term and Year, enter a 'Subjects Done' count and click 'Set All' to apply it to every student in that class, then fine-tune individual students with the Pencil icon.

### FIELDS ON THIS SCREEN

Tabs: Exams, Grades, Subjects Done

Exam modal: Exam Name, Term, Year, Out Of, Percentage

Grade rows: Grade, Min, Max, Points, Remarks

Grading systems: 8.4.4 (12), KJSEA (8), CBC (4), KNEC TVET (7), CBET (4)

Subjects Done: Form, Term, Year, Subjects Done count

**Tip** — 'Out Of' is the school-wide agreed maximum per paper (e.g. 50 or 100) and marks are NOT converted; 'Percentage' controls each exam's contribution when combining exams on a report card.

**Tip** — Available grading templates are filtered by school type — Secondary sees 8-4-4 and KJSEA, Primary sees CBC and KJSEA, TVET sees KNEC TVET and CBET.

**Tip** — Configured subjects sort to the top of the Grades sidebar with a green count badge, so you can see at a glance what still needs a grading scale.

**Take care** — 'Delete All' on a subject's grades warns the action cannot be undone.

**Take care** — Bulk Setup and Copy write grade rows into the target subjects, overwriting any grades those subjects already had.

**Take care** — 'Set All' on Subjects Done silently overwrites the subjects-done count for every student in the selected class/term/year.

## ■ 5.3 Set Marks

Configure the maximum mark (the 'Out Of') for each subject, per exam, per class. This tells the marks-entry pages what each paper is marked out of and must be done before teachers can record marks for that subject and exam.

- 1 Navigate to Academic Manager > Set Marks. The left 'Set Marks Options' panel holds the configuration form; the right 'Already Set Marks' panel lists existing configurations.
- 2 In the left panel choose the cascading selectors in order — for a secondary school: Subject, then Form, then Stream (TVET schools pick Year/Module, Programme, then Unit).
- 3 Choose the Year, then the Term (the Exam list loads once term and year are set), then choose the Exam.
- 4 Enter the 'Out Of' number (the value the teacher will mark this paper out of, e.g. 60), then click 'Save Settings'. The saved row appears in the right-hand table.
- 5 To change an existing configuration, click the Pencil icon on a row, edit only the 'Out Of' value in the dialog, and click 'Update'.
- 6 Use the Year/Term/Class filters or the Search box to find rows, tick rows and click 'Delete Selected' for bulk removal, or use 'Export CSV' to download the list.

### FIELDS ON THIS SCREEN

Left form (secondary order): Subject, Form, Stream, Year, Term, Exam, Out Of

Left form (TVET order): Year/Module, Programme, Unit, Year, Term, Exam, Out Of

Right panel filters: Year, Term, Class, Search

**Tip** — 'Out Of' is what the teacher marks the paper out of — marks are not converted, so if a paper is out of 60 set 60.

**Tip** — Teachers see an amber notice and can only set marks for the subject/class combinations they have been allocated; administrators can set any.

**Tip** — Only the 'Out Of' value can be edited later — the subject, class, year, term and exam keys are fixed once saved.

**Take care** — The bulk delete dialog warns the action cannot be undone.

**Take care** — Saving the same subject/form/stream/year/term/exam combination re-posts to the store endpoint and updates the existing 'Out Of' without a separate overwrite confirmation.

## ■ 5.4 Subject Allocation

Choose which students in a class actually sit a given subject, per class and term. Useful when students in the same class take different optional subjects — teachers then only record marks for the allocated students.

- 1 Navigate to Academic Manager > Subject Allocation.
- 2 In the filter bar select the Form (required), optionally a Stream (or leave 'All Streams'), then the Year, Term and Subject.
- 3 Click 'Load' to fetch the student list for that class/subject; each student's current allocation pre-fills its checkbox.
- 4 Tick (or untick) the students who take this subject — you can click a whole row to toggle, or use the header checkbox to select all filtered results.
- 5 Use the Search box ('Search by name or admno...') to find specific students in a large class.
- 6 Click 'Save Allocation' to save the exact set of ticked students. Use 'Export CSV' to download the allocated list.

### FIELDS ON THIS SCREEN

Filters: Form (required), Stream (optional / All Streams), Year (required), Term (required), Subject (required)

Table: Admno, Student Name, Allocated (Yes/No)    Actions: Load, Save Allocation, Export CSV

**Tip** — The header select-all checkbox operates across all filtered results, not just the current page.

**Tip** — The info bar shows Total and Selected counts so you can confirm how many students are allocated before saving.

**Tip** — Only allocated (ticked) students are included in the CSV export.

**Take care** — Saving overwrites the server allocation for that form/stream/term/year/subject with exactly the currently ticked set — any student you untick is de-allocated, and there is no confirmation prompt.

## 5.5 Record Marks

Enter student marks for a chosen subject and exam. Marks auto-save as you tab between fields, and 'Save & Finish' finalizes the sheet and marks it as recorded. Requires that the exam and its 'Out Of' have already been configured in Set Marks.

- 1 Navigate to Academic Manager > Record Marks.
- 2 Select the filters: Form, Stream (optional unless TVET), Year, Term, Exam and Subject.
- 3 Click 'Load' to pull the student roster. The info bar shows the Subject, Exam, Class and the 'Out of' maximum.
- 4 Type each student's mark in their row — the field shows a '/' Out Of' placeholder (TVET CBET subjects instead show a Competent / Not Yet Competent dropdown).
- 5 Each mark auto-saves when you move to the next field (a spinner then a green check appears on the row); use the Search box to jump to specific students.
- 6 When the whole sheet is complete, click 'Save & Finish' to persist all marks and set the status to 'recorded'.

### FIELDS ON THIS SCREEN

Filters: Form, Stream, Year, Term, Exam, Subject

Per-student input: Marks (numeric, or Competent / Not Yet Competent for TVET CBET)

Actions: Load, Save & Finish, Export CSV

**Tip** — Marks auto-save on blur, so you rarely lose work — but still click 'Save & Finish' to mark the subject as officially recorded.

**Tip** — An amber '{n}' unsaved change(s)' indicator and a 'Filled' badge help you track progress.

**Tip** — If loading fails with a pre-check error (e.g. Out Of not set, or you have no allocation for the subject), the 'Cannot Record Marks' panel explains what to fix first.

**Take care** — Any mark greater than the 'Out Of' maximum is flagged red with a warning banner, and 'Save & Finish' is disabled until you correct it.

**Take care** — Existing marks are pre-loaded into the fields and are silently overwritten when you re-save — there is no separate overwrite confirmation.

## 5.6 Edit Marks

Load previously recorded marks for a class and correct them. Works like Record Marks (auto-save on blur, then Save & Finish) but is intended for amendments and respects locked exams.

- 1 Navigate to Academic Manager > Edit Marks.

- 2 Select all six filters — Form, Stream, Year, Term, Exam and Subject (all are required here).
- 3 Click 'Load' to bring the previously recorded marks into the per-student rows.
- 4 Edit any student's mark in their row; each change auto-saves when you move to the next field (spinner then green check).
- 5 Use the Search box to find specific students, and watch the 'Filled' badge and '{n} unsaved change(s)' indicator.
- 6 Click 'Save & Finish' to persist the edits and set the status back to 'recorded'. Use the 'CSV' button to export.

## FIELDS ON THIS SCREEN

Filters: Form, Stream, Year, Term, Exam, Subject (all required)

Per-student input: Marks (numeric)

Actions: Load, Save &amp; Finish, CSV

**Tip** — Unlike Record Marks, Stream is always required on the Edit Marks filter bar.

**Tip** — For TVET schools the Term dropdown labels read 'Semester N' instead of 'Term N'.

**Tip** — If loading fails, the 'Cannot Edit Marks' panel shows the server's reason.

**Take care** — If the exam is locked, a red banner reads 'Marks are locked and cannot be edited. Contact the dean to unlock marks for this exam.' — all inputs are disabled and saving is blocked until a dean allows re-entry (see Marks Status).

**Take care** — Marks above the 'Out Of' maximum are flagged red and block 'Save & Finish'.

**Take care** — Edited marks overwrite the existing recorded values without a confirmation dialog.

## ■ 5.7 Marks Status

For deans and senior teachers: see which subjects have been recorded for a class and exam, who the responsible teacher is, and control the recording status by locking marks or allowing re-entry.

- 1 Navigate to Academic Manager > Marks Status.
- 2 Select the filters: Form, Stream, Year, Term and Exam (all required).
- 3 Click 'Load' to show a per-subject status table.
- 4 Read each row: the Subject, the assigned Teacher (with a tap-to-call phone link), the Status badge (Open, Recorded, Locked, or Pending) and the Recorded count ({recorded}/{total}).
- 5 For a recorded subject, click 'Lock' to stop teachers editing it, then confirm 'Lock Marks' in the dialog.
- 6 To reopen a recorded or locked subject, click 'Allow Re-entry' and confirm — this resets the subject to Pending so the teacher can re-record.

- 7 Use the Search box or 'CSV' button to filter and export the status list.

#### FIELDS ON THIS SCREEN

Filters: Form, Stream, Year, Term, Exam

Table: Subject, Teacher, Status, Recorded (count), Action

Row actions: Lock, Allow Re-entry

**Tip** — This page is how a dean unlocks an exam that a teacher reports as locked on the Edit Marks page — click 'Allow Re-entry'.

**Tip** — The Teacher column links straight to the teacher's phone number so you can follow up on missing marks.

**Tip** — Status badges are colour-coded: green Open, blue Recorded, red Locked, grey Pending.

**Take care** — 'Allow Re-entry' deletes the recording status and sends the subject back to Pending — the teacher must re-record before it counts again.

**Take care** — Locking marks prevents the assigned teacher from editing that subject until you allow re-entry.

## 5.8 Exam Analysis

Generate performance analysis across one or more exams: class means, grade distribution, subject performance, student rankings and grades — then print report cards or send SMS to parents straight from the results.

- 1 Navigate to Academic Manager > Exam Analysis.
- 2 Select Form, Stream (or 'All Streams'), optional Pathway, Year and Term, then open the Exams popover and tick one or more exams ('Select All' / 'Clear' available).
- 3 Optionally set 'Grade Using' (Total Marks or Total Points) and 'Analysis Mode' (All Subjects, 7 Best (KNEC), or CBET for TVET).
- 4 Click 'Load Analysis'. Stream tabs appear (All plus one per stream) so you can filter the results.
- 5 Review the results spreadsheet (marks and grade per subject, totals, average, points, stream and overall position) and the collapsible summary cards: Class Mean Scores, Grade Distribution and Subject Performance.
- 6 To exclude outliers, tick students and click 'Exclude Selected' (the analysis re-generates); use 'Re-include All' to restore them.
- 7 Print report cards with the per-row printer icon or 'Print All Reports', send SMS with the per-row mail icon or 'Send All SMS', and export the analysis with the 'CSV' button.

## FIELDS ON THIS SCREEN

Filters: Form, Stream (incl. All Streams), Pathway, Year, Term, Exams (multi-select)

Options: Grade Using (Total Marks / Total Points), Analysis Mode (All Subjects / 7 Best (KNEC) / CBET)

Summary cards: Class Mean Scores, Grade Distribution, Subject Performance

Actions: Load Analysis, Exclude Selected, Print All Reports, Send All SMS, CSV, Re-generate

**Tip** — Changing any filter clears the current analysis — re-click 'Load Analysis' after adjusting selectors.

**Tip** — '7 Best (KNEC)' scores each student on their seven best subjects; TVET schools get a CBET Competent/NYC mode and a Classification column.

**Tip** — The CSV includes Class Mean, Students Mean and Subjects Mean summary sections in one file.

**Take care** — 'Exclude Selected' and 'Send All SMS' act immediately (no confirmation dialog) — SMS is sent to every parent in the current view as soon as you click.

## ■ 5.9 Spreadsheet

A read-only exam-analysis spreadsheet view showing results, deviations, mean standard scores and positions in a dense grid, with client CSV and server PDF export. It presents computed analysis — it does not enter or save marks.

- 1 Navigate to Academic Manager > Spreadsheet.
- 2 Select Form, Stream (or 'All Streams'), Year and Term, then open the Exams popover and tick one or more exams.
- 3 Optionally set 'Grade Using' (Total Marks / Total Points) and 'Analysis Mode' (All Subjects, 7 Best (KNEC), or CBET for TVET).
- 4 Click 'Load Analysis' — the page uses a cached analysis if one matches, otherwise computes fresh results.
- 5 Read the grid: entry marks (KCPE/KJSEA), each subject with its grade, then Ttl, Avg, Pts, Dev (deviation), MSS (mean standard score), GD (grade), Pos (stream position) and Ovrl (overall position).
- 6 Review the collapsible Class Mean Scores, Grade Distribution and Subject Performance sections, use the Search box to filter, then export with 'CSV' or 'PDF'.

## FIELDS ON THIS SCREEN

Filters: Form, Stream (incl. All Streams), Year, Term, Exams (multi-select)

Options: Grade Using, Analysis Mode

Grid columns: Admno, Name, subjects, Ttl, Avg, Pts, Dev, MSS, GD, Pos, Ovrl

Actions: Load Analysis, CSV, PDF

**Tip** — The Strm column only appears when Stream is set to 'All Streams'.

**Tip** — Deviation (Dev) shows green with a '+' when at or above the mean and red when below.

**Tip** — This is a viewer only — enter and correct actual marks on Record Marks / Edit Marks.

## ■ 5.10 SBA / KNEC CBA

Record School-Based Assessments (KNEC Competency Based Assessment): define projects, practicals and tests per learning area, capture a score for each learner (the EE/ME/AE/BE performance level is computed automatically), check upload completeness, and export the registers for the KNEC CBA portal (cba.knec.ac.ke). SBAs contribute 20% of KJSEA and 15% per year of the final Grade 12 KCBE grade.

- 1 Navigate to Academic Manager > SBA / KNEC CBA. First choose the context at the top: Grade, Year and Term (all three are required before the tabs become usable).
- 2 On the 'Assessments & Scores' tab, click 'New Assessment', choose the Learning Area, pick an Assessment Type (Project, Practical, Written Test, Portfolio or Observation), set 'Out of' (default 100) and an optional Title, then click 'Create Assessment'.
- 3 For an assessment, click 'Enter Scores' to open the score sheet. Type each learner's Score out of the maximum — the Level badge (EE, ME, AE or BE) computes live from the percentage. Leave blank if a learner was not assessed.
- 4 Click 'Save Scores' to store the sheet. The assessment row shows a progress bar of scores entered against the total roster.
- 5 Open the 'Completeness Check' tab to see score-capture progress per assessment and a table of learners with missing scores — everything must be complete before uploading to the CBA portal.
- 6 Open the 'KNEC Exports' tab. Click 'Download Scores CSV' for the per-learner Score + Level layout for keying into cba.knec.ac.ke, or 'Download Register CSV' for the learner bio-data registration register (assessment number, UPI, names, pathway and subject combination).
- 7 Use the Pencil icon to edit an assessment's definition or the Trash icon to delete it.

### FIELDS ON THIS SCREEN

Context: Grade, Year, Term

Tabs: Assessments & Scores, Completeness Check, KNEC Exports

Assessment dialog: Learning Area, Assessment Type (Project / Practical / Written Test / Portfolio / Observation), Out of, Title (optional)

Score sheet: Adm No, Name, Stream, Score, Level (EE / ME / AE / BE)

Exports: Download Scores CSV, Download Register CSV

**Tip** — Performance levels are computed from the score percentage: EE (Exceeding) at 80%+, ME (Meeting) at 60%+, AE (Approaching) at 40%+, and BE (Below) under 40%.

**Tip** — A learner is assessed with a single numeric score per assessment — there are no separate strand or rubric-descriptor fields; the KNEC level is derived automatically.



**Tip** — The Completeness Check tab is the fastest way to find exactly which learners still need scores before a KNEC upload.

**Tip** — The Scores CSV is for keying results into cba.knec.ac.ke; the Register CSV is for KJSEA (Grade 9) and Grade 10 CBA registration.

**Take care** — Deleting an SBA assessment also deletes all recorded scores for it (the dialog names the learning area, title and score count and warns it cannot be undone).

## ■ 5.11 Report Cards

Generate and print student report cards for a class, exam set and term. Load the students, then print individual or bulk PDF report cards, send them to parents by SMS, or export a CSV — the page is a read-only generator built on the same analysis data.

- 1 Navigate to Academic Manager > Report Cards.
- 2 Select Form, Stream (or 'All Streams'), Year and Term, then open the Exams popover and tick one or more exams ('Select All' / 'Clear' available).
- 3 Optionally set 'Grade Using' (Total Marks / Total Points) and 'Analysis Mode' (All Subjects or 7 Best (KNEC)).
- 4 Click 'Load Students' to build the results table (subject marks and grades, Marks, Points, Grade, stream and overall position).
- 5 Use the Search box to find students; click the per-row printer icon to download a single report card PDF, or the mail icon to send that student's report to their parent by SMS.
- 6 Click 'Print All Reports' to download every report card as one PDF, 'Send All as SMS' to message all parents, or 'Export CSV' to download the underlying data.

### FIELDS ON THIS SCREEN

Filters: Form, Stream (incl. All Streams), Year, Term, Exams (multi-select)

Options: Grade Using (Total Marks / Total Points), Analysis Mode (All Subjects / 7 Best (KNEC))

Table: Admno, Student Name, subjects, Marks, Points, Grade, S.Pos, O.Pos

Actions: Load Students, Print All Reports, Send All as SMS, Export CSV

**Tip** — Report card filenames encode the student/class, term and year (e.g. report-card-{admno}-T{term}-{year}.pdf) so downloads are easy to file.

**Tip** — The CSV export includes gender, per-subject marks, totals, mean points, grade, positions and the headteacher's remarks.

**Take care** — 'Send All as SMS' messages every parent in the loaded list immediately with no confirmation dialog — double-check the class, stream and exam selection before clicking.

# Module 06

## TVET & Mock Exams

Specialist academic tools for exam-focused and TVET/technical colleges. The Mock Exams pages let you configure multi-paper mock papers, record and edit paper marks, and produce KNEC-style analysis and broadsheets. The TVET/KNEC pages let you manage TVET programmes and units, capture unit (CAT + Exam) marks with competency status, track KNEC exam registrations and industrial attachments, and run student clearance with leaving certificates. Most write actions are permission-gated, so a button only appears if your role or user permissions allow it. Field labels such as "Student", "Subject", "Form" and "Term" adapt to your school type (they may read as learner, module, class, etc.).

### 6.1 Mock Exams: Set Papers

Configure the "Out Of" maximum marks for Paper 1, Paper 2, and Paper 3 of each subject, per class, stream, year, and term. These paper configurations drive the maximums used later on the Record Marks and Edit Marks pages. Marks are never scaled or converted — whatever you set here is exactly what the teacher marks against.

- 1 Navigate to Academic Manager > Mock Exams > Set Papers. The page opens as "Mock Exam — Set Papers" with a "Set Papers Options" panel on the left and an "Already Set Papers" table on the right.
- 2 In the left panel, select the Form (required). This loads the subject list for that form. Optionally pick a Stream (enabled only if the form has streams).
- 3 Select the Subject (required), then the Year (required), then the Term (the Term dropdown is disabled until a Year is chosen).
- 4 Enter Paper 1 (Out Of) — required — and optionally Paper 2 and Paper 3. The read-only Total (P1+P2+P3) auto-calculates.
- 5 Click Save Settings. The three paper inputs clear and the right-hand table refreshes. Saving the same Subject/Form/Stream/Year/Term again overwrites the existing config in place.
- 6 Use the right-hand "Already Set Papers" table to review, sort, and filter (All Years, All Terms, All Forms, Search) existing configurations. Click the pencil to open "Edit Paper Settings" and adjust the paper maximums, or Export CSV to download the filtered list as mock-papers-export.csv.
- 7 To remove a config, click the red trash icon on a row (or tick several rows and use Delete Selected) and confirm in the dialog.

#### FIELDS ON THIS SCREEN

Form (required)   Stream (optional, only if the form has streams)   Subject (required)   Year (required)

Term (required, disabled until Year chosen)   Paper 1 (Out Of) — number, required   Paper 2 (Out Of) — number, optional

Paper 3 (Out Of) — number, optional   Total (P1+P2+P3) — read-only, auto-calculated

**Tip** — The blue "Out Of" note explains it: this is what the teacher will mark the paper out of (e.g. 50, 60, or 100). Marks are not converted — if the paper is out of 60, set 60.

**Tip** — Saving with the same Subject, Form, Stream, Year, and Term overwrites the existing configuration, so this is also how you correct an entry.

**Tip** — You must set at least Paper 1 for the combined total to be greater than zero, otherwise the save is blocked.

**Tip** — Editing via the pencil only changes the paper maximums — the subject, class, term, and year are shown read-only.

**Take care** — Delete is permanent. The bulk-delete dialog states "This action cannot be undone" — removing a paper config affects the maximums used when recording marks for that subject.

## 6.2 Mock Exams: Record Marks

Enter student marks for a single subject and paper (Paper 1, 2, or 3) of a mock exam. The page loads the class roster and validates each mark against the paper's configured maximum. If marks were already recorded for that paper, they are locked until you explicitly choose to re-enter them.

- 1 Navigate to Academic Manager > Mock Exams > Record Marks. The page opens as "Mock Exam — Record Marks".
- 2 Select the Form (required), then optionally a Stream (defaults to "-- All --"), then Year (required), Term (required), Subject (required), and Paper (required: Paper 1, 2, or 3).
- 3 Click Load. The page ensures the storage columns exist and fetches the class roster plus any existing marks. A badge shows "Recording {subject} — Paper {n} (Out of {maximum})".
- 4 Enter each student's mark in the table. Inputs accept digits and a single decimal point; press Enter or Tab to jump to the next student (Shift+Tab to go back). Watch the Total and Filled counters above the table.
- 5 Click Save Marks ({filled}/{total}) to persist. Empty cells are saved as blank (null), not zero. There is no autosave — marks are only stored when you click Save.
- 6 If a mark exceeds the paper maximum, that row turns red and an amber bar warns you — correct it before saving, as the save is blocked while any mark is out of range.

### FIELDS ON THIS SCREEN

Form (required)

Stream (optional, default "-- All --")

Year (required)

Term (required)

Subject (required)

Paper (required: Paper 1 / Paper 2 / Paper 3)

Marks per student (numeric, 0 to the paper maximum)

**Tip** — The "Out of" maximum comes from the Set Papers configuration for that subject/paper. If no paper config exists, loading shows a "Cannot Record Marks" message instead of the table — set the paper first.

**Tip** — Use Enter or Tab to move quickly down the roster; the next input's text is auto-selected for fast typing.

**Tip** — The footer and badges show how many of the class have marks entered, so you can confirm completeness before saving.

**Take care** — This page requires the "record marks" permission (`academics.record_marks.create`). Without it, all inputs and the Save button are disabled — you can view but not enter marks.

**Take care** — If marks were already recorded for the subject and paper, an amber bar appears and the inputs are locked. Clicking "Re-Enter Marks" overwrites the previously saved marks (a forced update) — there is no separate confirmation dialog, so use it deliberately. You can instead click "Go to Edit Marks" to make targeted edits.

## ■ 6.3 Mock Exams: Edit Marks

Edit marks that were already recorded for a specific mock exam subject and paper. Only the rows you change are saved, changed rows show their previous value, and marks that have been locked (status "Recorded") require an explicit Force Edit override before they can be changed.

- 1 Navigate to Academic Manager > Mock Exams > Edit Marks. The page opens as "Mock Exam — Edit Marks".
- 2 Select Form (required), optionally Stream, then Year (required), Term (required), Subject (required), and Paper (required), then click Load.
- 3 Edit any student's mark in the table. Changed rows are highlighted orange and show "was {old value}" so you can compare against the original. Counters show Total, Filled, and Modified.
- 4 Click Save {N} Change(s) in the footer. Only the modified rows are written; a success toast confirms and the table reloads to reset the change tracking.
- 5 If the marks are locked (a yellow "Marks are locked (status: Recorded)" banner appears), click Force Edit to unlock them, then edit and save — the save is sent with an override flag.
- 6 Correct any out-of-range marks before saving: rows above the paper maximum are highlighted red and the save is blocked until fixed.

### FIELDS ON THIS SCREEN

Form (required)

Stream (optional, default "-- All --")

Year (required)

Term (required)

Subject (required)

Paper (required: Paper 1 / Paper 2 / Paper 3)

Marks per student (numeric, 0 to the paper maximum)

**Tip** — Only changed rows are saved — if you click Save with no edits you get a "No changes to save" message.

**Tip** — The "was {value}" hint next to each edited input lets you double-check your change before committing it.

**Tip** — The "Out of" maximum is derived from the subject's paper configuration, the same value used on Record Marks.

**Take care** — Editing requires the "record marks" permission (`academics.record_marks.create`); without it all inputs and Save are disabled.

**Take care** — Force Edit overwrites already-recorded, locked marks and there is no confirmation dialog — an orange "Force editing enabled — changes will override locked marks" banner is your only warning. Use it only when you intend to change official records.

## ■ 6.4 Mock Exams: Analysis

Generate and view the full mock exam analysis for a class across all subjects and streams: per-student results with grades, totals, points and positions, plus class means, grade distribution, and subject performance. From here you can print report cards, send results by SMS to parents, exclude/re-include students, and export CSV.

- 1 Navigate to Academic Manager > Mock Exams > Analysis. The page opens as "Mock Exam Analysis".
- 2 Choose the Form, Year, and Term. Optionally set Grade By (Marks or Points) and Mode (Normal, or KNEC 7-Best which grades on the seven best subjects).
- 3 Click Generate Analysis to compute fresh results, or Load Cached to reload a previously generated run without recomputing. Summary cards show Total Students, Class Mean, and Top Grade, plus a "Last generated" timestamp.
- 4 Use the stream tabs (All plus one per stream) to filter, and switch between the Results tab (per-student table) and the Analysis tab (class means, grade distribution, subject performance).
- 5 In Results, search by name or admission number, sort by any column, and use the per-row actions: the printer icon downloads a single student's report card PDF, and the message icon sends that student's mock results to parents by SMS.
- 6 Export data with Export CSV (full analysis) or Print Report Cards (bulk PDF for the current stream). Each Analysis-tab card also has its own CSV button for just that section.
- 7 To drop outliers, tick students and click Exclude {N} Student(s); the analysis regenerates automatically. An amber banner lists excluded students with a Re-include All button to reverse it.

### FIELDS ON THIS SCREEN

Form (required)

Year (required)

Term (required)

Grade By (Marks or Points)

Mode (Normal or KNEC 7-Best)

**Tip** — "Load Cached" is faster when you just want to re-open the last analysis; "Generate Analysis" recomputes from current marks.

**Tip** — KNEC 7-Best mode grades and ranks on each student's seven best subjects, matching KNEC-style reporting; Normal uses all subjects.

**Tip** — Grades are colour-coded (green A/A-, blue B, yellow C, orange D, red E) throughout the tables and distribution bar.

**Tip** — Excluding students only affects the analysis (positions and means recompute) and is fully reversible with Re-include All — it does not delete any marks.

**Take care** — Sending SMS delivers real messages to parents and consumes SMS credits — confirm you have the right student and term before clicking the message icon.

**Take care** — Changing any filter clears the displayed analysis; you must Generate or Load Cached again to see results.

## ■ 6.5 Mock Exams: Spreadsheet

A read-only broadsheet view of a full class or stream's mock results: every subject side by side with marks and grades, plus totals, averages, points, deviation, positions, and class analysis. This page is for viewing and exporting only — it does not edit marks.

- 1 Navigate to Academic Manager > Mock Exams > Spreadsheet. The page opens as "Mock Exam Spreadsheet".
- 2 Select Form (required), Stream (required — choose a specific stream or "All Streams"), Year (required), and Term (required). Optionally set Grade Using (Total Marks or Total Points) and Analysis Mode (All Subjects or 7 Best (KNEC)).
- 3 Click Load Spreadsheet. The broadsheet appears with sticky Adm No and Name columns, an entry-marks column (labelled KCPE for 8-4-4 or KJSEA for CBC), two columns per subject (mark and grade), and summary columns (Total, Avg, Pts, Dev, Grade, Cls Pos, Ovrl Pos).
- 4 Use the search box to filter by name, admission number, or stream, and click any column header to sort. A "Subject Mean" row at the bottom shows the mean per subject.
- 5 Review the Analysis summary panels below the table: Class Mean Scores, Grade Distribution, and Subject Performance.
- 6 Export with CSV (client-side broadsheet plus class-mean, grade-distribution, and subject-mean summaries) or PDF (server-generated report). Files are named mock-spreadsheet-{form}-{stream}-T{term}-{year}.

### FIELDS ON THIS SCREEN

Form (required)

Stream (required, includes "All Streams")

Year (required)

Term (required)

Grade Using (Total Marks or Total Points)

Analysis Mode (All Subjects or 7 Best (KNEC))

**Tip** — This is a viewing and export page only — there are no edit, delete, or overwrite actions here. Edit marks on the Record Marks or Edit Marks pages.

**Tip** — The entry-marks column auto-labels as KCPE (8-4-4) or KJSEA (CBC/GRADE forms) depending on the class.

**Tip** — Set Grade Using and Analysis Mode the same as on the Analysis page so the two views agree.

**Tip** — The Dev (deviation) column shows how each student compares to the mean — green with a "+" when at or above, red when below.

## ■ 6.6 TVET: Units & Programmes

Manage the TVET catalogue: create programmes (e.g. Diploma in ICT), create units with year/semester and credit hours, and map which units belong to each programme. Organised into three tabs — Programmes, Units, and Mapping.

- 1 Navigate to Academic Manager > TVET > Units. The page opens as "TVET Unit Management" with Programmes, Units, and Mapping tabs.
- 2 On the Programmes tab, click Add Programme and fill the sheet: Programme Code (auto-uppercased, required), Programme Name (required), optional Department, Level (Artisan/Certificate/Diploma/Higher Diploma/Degree), Duration in semesters, and the Active checkbox. Click Create.
- 3 On the Units tab, click Add Unit and fill: Unit Code (required), Unit Name (required), Year of Study, Semester, Credit Hours, Theory, Practical, optional Description, and the Core Unit and Active checkboxes. Click Create. Use the Year and Semester filters to find units.
- 4 On the Mapping tab, choose a programme on the left to see its Assigned Units; tick one or more units under Available Units on the right and click Assign {N} Unit(s).
- 5 To remove a unit from a programme, click the X next to it in the Assigned Units list — this takes effect immediately (and is reversible by re-assigning).
- 6 Edit any programme or unit with the pencil icon, or delete with the red trash icon and confirm in the dialog.

### FIELDS ON THIS SCREEN

Programme: Code (required, auto-uppercased), Name (required), Department, Level, Duration (semesters), Active

Unit: Code (required), Name (required), Year of Study, Semester, Credit Hours, Theory, Practical, Description, Core Unit, Active

Mapping: Programme (select), Available Units (checkboxes)

**Tip** — Programme and Unit codes are automatically converted to uppercase as you type.

**Tip** — The Units table shows how many programmes each unit is mapped to, and the Programmes table shows the unit count per programme.

**Tip** — Removing a unit from a programme on the Mapping tab is immediate with no confirmation, but you can re-assign it at any time.

**Take care** — Creating and editing require the TVET or settings create/edit permission (academics.tvet.\* or academics.settings.\*); buttons are hidden without it.

**Take care** — Deleting a programme or unit is permanent — the confirmation dialog states "This action cannot be undone."

## ■ 6.7 TVET: Student Marks

Enroll students into a TVET unit and capture their CAT (out of 30) and Exam (out of 70) marks, with an auto-calculated total and KNEC TVET grade, plus per-student unit status and competency (Competent / Not Yet Competent / Pending).

- 1 Navigate to Academic Manager > TVET > Marks. The page opens as "TVET Student Marks".
- 2 In the Select Unit card, choose Programme, then Unit (enabled once a programme is chosen), then Academic Year and Semester. The enrolled-student marks table loads automatically and the Selected Unit card shows credit hours and counters (Enrolled, Competent, Not Yet, Pending).
- 3 Click Enroll Students to open the enrollment dialog. Already-enrolled students appear greyed with an "Already Enrolled" badge; tick the students to add (or use Select All) and click Enroll {N} Students.
- 4 In the marks table, enter each student's CAT (0-30) and Exam (0-70); the Total (out of 100) and Grade compute automatically, and you can type Remarks inline.
- 5 Click Save Marks to batch-save all edited rows (the button is disabled until you have unsaved changes).
- 6 To change a student's status, click the graduation-cap icon in their Action column, set Unit Status (Enrolled / In Progress / Completed / Failed / Retake / Exempted) and Competency Status (Competent / Not Yet Competent / Pending), add remarks, and click Update Status.

### FIELDS ON THIS SCREEN

Programme (required)   Unit (required)   Academic Year (required)   Semester (required)   CAT (0-30) per student  
Exam (0-70) per student   Remarks per student   Status dialog: Unit Status, Competency Status, Remarks

**Tip** — The KNEC TVET grade is derived from the total out of 100: A ( $\geq 70$ ), B ( $\geq 60$ ), C ( $\geq 50$ ), D ( $\geq 40$ ), E ( $\geq 30$ ), F ( $\geq 20$ ), otherwise G.

**Tip** — Non-enrolled students are pre-selected in the Enroll dialog, so you can enroll a whole programme cohort into a unit in one click.

**Tip** — Save Marks stays disabled until there is something to save — if you see "No changes to save", you have not edited any marks.

**Take care** — Marks and status changes overwrite prior values immediately on save/update with no confirmation dialog — double-check CAT/Exam and competency before saving.



## 6.8 TVET: KNEC Exam Registration

Track KNEC exam registrations per student: the module/unit sat, exam series and year, programme and level, KNEC index number, fee amount and whether it is paid, and the registration status through to certification. This is an internal tracking record — it does not submit anything to KNEC.

- 1 Navigate to Academic Manager > TVET > KNEC Registration. The page opens as "KNEC Exam Registration".
- 2 Click Add Registration to open the "Add KNEC Registration" sheet.
- 3 Search and select the student (type at least 2 characters; results show name, admission number, and form).
- 4 Fill the registration: Exam Series (July/November), Exam Year, Subject/Module (required), Programme, Level, KNEC Index No., Fee Amount (required, must be greater than 0), and Fee Paid? (No/Yes). New records start as status "Registered".
- 5 Click Create Registration. Use the filters at the top (Exam Series, Year, Status, Search) to find records later.
- 6 Edit a record from its row menu to update details and move Status through Registered > Sat > Results Out > Certified. Mark fees paid by editing Fee Paid? to Yes.
- 7 Delete a registration from the row menu and confirm in the dialog if it was created in error.

### FIELDS ON THIS SCREEN

Student (required, searchable, min 2 characters)   Exam Series (July / November)   Exam Year

Subject / Module (required)   Programme   Level   KNEC Index No.   Fee Amount (KES) (required, must be > 0)

Fee Paid? (No / Yes)   Status (Registered / Sat / Results Out / Certified) — on edit

**Tip** — Status badges are colour-coded: Registered (blue), Sat (amber), Results Out (purple), Certified (green).

**Tip** — This page only tracks registrations internally — there is no external KNEC submission or locking, so records stay fully editable.

**Tip** — Use the Year and Status filters to quickly pull up, for example, all November candidates still at "Registered".

**Take care** — Add, edit, and delete require the dean-settings permissions (academics.dean\_settings.create/edit/delete).

**Take care** — Deleting a registration is permanent — the dialog states "This action cannot be undone."

## 6.9 TVET: Industrial Attachment

Record and track student industrial attachment placements: the host company and address, supervisor contact, department, start and end dates, duration, and status (Ongoing / Completed / Cancelled), plus a grade and remarks

captured on completion.

- 1 Navigate to Academic Manager > TVET > Industrial Attachment. The page opens as "Industrial Attachment".
- 2 Click Add Attachment to open the "Add Industrial Attachment" sheet.
- 3 Search and select the student (min 2 characters).
- 4 Fill the placement: Company Name (required), Company Address, Supervisor Name, Phone, Email, Department, Start Date (required), End Date, Duration (Weeks), and Status (Ongoing/Completed/Cancelled).
- 5 Click Create Attachment Record. Use the Status filter and Search (by name, admission number, or company) to find records.
- 6 Use View Details on a row to see the full read-only placement, or Edit to update it — the Edit sheet adds Grade and Remarks fields for recording the outcome.
- 7 Delete a record from the row menu and confirm if it was entered by mistake.

#### FIELDS ON THIS SCREEN

Student (required, searchable, min 2 characters) Company Name (required) Company Address Supervisor Name

Phone Email Department Start Date (required) End Date Duration (Weeks)

Status (Ongoing / Completed / Cancelled) Grade and Remarks (on edit)

**Tip** — Status badges: Ongoing (blue), Completed (green), Cancelled (grey).

**Tip** — Grade and Remarks only appear on the Edit sheet — capture the outcome by editing the record once the attachment is complete.

**Tip** — View Details is available to everyone, even without edit permission, so supervisors can review placements read-only.

**Take care** — Add, edit, and delete require the dean-settings permissions (academics.dean\_settings.create/edit/delete).

**Take care** — Deleting an attachment record is permanent — the dialog states "This action cannot be undone."

## 6.10 TVET: Student Clearance

Track student clearance for module completion, graduation, or withdrawal against a checklist (fees, library, attachment, exams, certificate), and generate a leaving certificate once all items are cleared. A Pending tab surfaces Alumni/transferred students who still need a clearance record, and Bulk Generate creates records for a whole class at once.

- 1 Navigate to Academic Manager > TVET > Student Clearance. The page opens as "Student Clearance" with Clearance Records and Pending Clearance tabs.

- 2 To add one record, click Add Clearance, search and select the student (Programme, Module, and Qualification auto-fill where available), choose the Clearance Type (Module Completion / Graduation / Withdrawal), tick the cleared checklist items, add remarks, and click Create Clearance Record.
- 3 To create many at once, click Bulk Generate, pick a Form/Class (students without existing records load pre-selected), set the Clearance Type and optional Module, refine the selection, and click Generate {N} Record(s). Students who already have a record are skipped.
- 4 Check the Pending Clearance tab for Alumni or transferred (TRAN) students with no clearance record; click Add to Clearance on a row to quick-create one using the suggested type.
- 5 Open a record to edit its checklist and set the Cleared Date as each item is completed. The Fees/Library/Attach./Exams/Cert. columns show a green check or red X at a glance.
- 6 When fees, library, attachment, and exams are all cleared, use Leaving Certificate on the row menu, optionally fill the Headteacher's Report (Ability & Industry, Conduct, Co-Curricular), and click Generate PDF to download leaving-certificate-{admno}.pdf.
- 7 Delete a clearance record from the row menu and confirm if it was created in error.

## FIELDS ON THIS SCREEN

Student (required on create, searchable, min 2 characters)

Clearance Type (Module Completion / Graduation / Withdrawal)

Subject / Module

Programme

Qualification Awarded

Fees Cleared (checkbox)

Library Cleared (checkbox)

Attachment Completed (checkbox)

Exams Cleared (checkbox)

Certificate Collected (checkbox)

Cleared Date (on edit)

Remarks

**Tip** — The Pending tab only lists students already in Alumni or TRAN (transferred) status who lack a clearance record — this page reads that status, it does not change a student's enrolment.

**Tip** — The Leaving Certificate option stays disabled until fees, library, attachment, and exams are all cleared (Certificate Collected is not required for this gate).

**Tip** — Bulk Generate automatically skips students who already have a clearance record and reports how many were created versus skipped.

**Tip** — Type badges are colour-coded: Module Completion (blue), Graduation (green), Withdrawal (amber).

**Take care** — Add, edit, delete, and bulk/quick generation require the dean-settings create/edit/delete permissions.

**Take care** — Bulk Generate and the Pending tab's "Add to Clearance" create records immediately with only the button as confirmation — review your selection first.

**Take care** — Deleting a clearance record is permanent — the dialog states "This action cannot be undone."

# Module 07

## Timetable

Build and manage your school's class timetable end to end: define the daily period structure, capture what each teacher teaches (lesson cards), set scheduling constraints and KICD/CBE rules, auto-generate the timetable, then view, fine-tune, and cover for absent teachers. Follow the sub-pages in order the first time you set up.

### 7.1 Period Setup

Define the building blocks of the timetable: the daily period schedule (lesson periods, breaks, lunch, assembly), the rooms lessons can be assigned to, and class groups (divisions) for splitting a class into parallel groups. This is always the first step.

- 1 Navigate to Timetable > Period Setup. The page opens on the Periods tab; Rooms and Class Groups tabs are alongside it.
- 2 On the Periods tab, under Quick Presets, click Use This on a preset card (7-Period Day, 8-Period Day (KICD standard), or Custom) to preview it. Review the slot list in the popup, then click Apply. Applying a preset replaces your current period schedule.
- 3 In the Period Schedule table, adjust each row: edit the Label, set Start and End times, pick a Type (lesson, break, lunch, or assembly), and toggle the day buttons (Mon-Fri) to choose which days the period runs.
- 4 Click Add Period to insert a manual row, or the trash icon on a row to remove it. Then click Save Changes. Every period must have valid start/end times (end after start) and at least one day selected, or the save is blocked.
- 5 Switch to the Rooms tab, click Add Room, and fill in Room Name, Short Name, optional Capacity/Building/Floor, and Room Type; keep Active checked and click Add Room.
- 6 Still on Rooms, use the Room Time-offs section: pick a room, click the Available/Unavailable cells in the period-by-day grid to mark when the room is unavailable, then click Save Time-offs.
- 7 Switch to the Class Groups tab, click Add Division, enter a Division Name, pick the Form and Stream, add one or more Groups (with optional student counts), and click Add Division to enable parallel/split-class scheduling.
- 8 Use the search boxes on the Rooms and Class Groups tabs to filter, and the pencil/trash icons to edit or delete existing rooms and divisions.

#### FIELDS ON THIS SCREEN

Label Start / End (time) Type (lesson / break / lunch / assembly) Days (Mon-Fri) Room Name Short Name  
Capacity Building / Floor Room Type Division Name Form Stream Groups (name + student count)

**Tip** — The 8-Period Day preset matches the KICD standard (8 x 40-minute lessons with health breaks and a 1-hour lunch).

**Tip** — Only lesson-type periods are used by teacher/room availability grids and the generator; breaks, lunch, and assembly are non-teaching slots.

**Tip** — Class Groups (divisions) let you split a class so different groups can take different subjects in the same period.

**Take care** — Applying a preset replaces the entire existing period schedule. Deleting a room or division is permanent and unassigns any lesson cards attached to it.

## ■ 7.2 Lesson Cards

Define what each teacher teaches to each class and how many periods per week. Each lesson card is one teacher + subject + class combination that the generator will place into the timetable.

- 1 Navigate to Timetable > Lesson Cards. Set the Year and Term filters at the top; cards are always scoped to a term and year.
- 2 Click Add Card to open the form. Pick the Form (this loads the eligible teachers and subjects), then the Stream, Teacher, and Subject.
- 3 Set Periods/Week (1-10), toggle Double Period if the lesson should run as a double, choose a Priority (Highest/High/Normal/Low/Lowest), and optionally set subject/teacher colors, a Room, a Preferred Room, a Group, and Notes.
- 4 Optionally add Joined Classes (other form/stream taught together in the same lesson) and Additional Teachers (with a role such as Assistant). Click Add Card to save.
- 5 To create a parallel option block (e.g. GEO/CRE taught in the same period with students split), either add parallel subjects inside the card form (each needs a different subject and teacher), or select two or more cards in the table and click Group as parallel block.
- 6 Use Import to bulk-create cards from existing subject allocations: choose the Term, Year, and a default periods-per-week value, then click Import.
- 7 Use the search box, and the Form/Stream/Teacher filters, to find cards; sort columns by clicking their headers; click CSV to export the current list.
- 8 Edit a card with the pencil icon, delete one with the trash icon, or select several with the checkboxes and click Delete Selected for a bulk delete.

### FIELDS ON THIS SCREEN

Year / Term   Form   Stream   Teacher   Subject   Periods/Week   Double Period   Priority  
 Room / Preferred Room   Group   Notes   Joined Classes   Additional Teachers (with role)

**Tip** — Choose the Form first in the Add Card form - it filters the Teacher and Subject dropdowns to what applies to that class.

**Tip** — Parallel-block members must be the same class with equal periods per week and each a different teacher; the table shows the block as e.g. GEO/CRE with a link badge.

**Tip** — Import is the fastest way to seed cards for a new term from your subject allocations, then adjust individually.

**Take care** — Deleting a lesson card (single or bulk) is permanent. Editing a card that is part of a parallel block dissolves and rebuilds the block from the current members.

## 7.3 Constraints

Configure the scheduling rules the generator must respect: general rules (max consecutive lessons, morning preference, subject-pair spacing, etc.), per-teacher availability, per-subject availability, and class time-offs. Includes one-click Kenya MOE/KICD presets.

- 1 Navigate to Timetable > Constraints. The page has four tabs: Scheduling Rules, Teacher Availability, Subject Availability, and Class Time-offs.
- 2 On Scheduling Rules, click Apply Kenya MOE Presets to load recommended rules automatically, or click View Kenya MOE/KICD Timetable Guidelines to read the official guidance first.
- 3 To add a rule manually, click Add Rule, pick a Constraint Type, set the Entity Type (teacher/subject/class/global) and Entity ID where needed, fill any dynamic parameter (e.g. a max value, a day, or the two subjects for a not-after pair), tick Hard constraint if it must be satisfied, set a Weight (1-10), and click Save.
- 4 In the rules table, use the Active switch to enable/disable a rule, the pencil to edit, and the trash icon to delete; click Export to download the rules as CSV.
- 5 Switch to Teacher Availability, pick a teacher, then click cells in the period-by-day grid to cycle each slot through Available, Prefer Not, and Unavailable, and click Save Availability.
- 6 Switch to Subject Availability, pick a subject, mark its slots the same way, and save - useful for subjects that must sit in specific periods.
- 7 Switch to Class Time-offs, pick a class, mark the periods when the class cannot be taught, and save.
- 8 Use the search box on the Scheduling Rules tab to filter the rules list.

### FIELDS ON THIS SCREEN

Constraint Type   Entity Type (teacher / subject / class / global)   Entity ID   Parameters (max/min value, day, subject pair)

Hard constraint   Weight (1-10)   Active   Availability status (Available / Prefer Not / Unavailable)

**Tip** — Hard constraints must be satisfied; soft constraints are weighted preferences - a higher weight means the generator tries harder to honor it.

**Tip** — Applying the Kenya MOE presets is the quickest way to get sensible defaults (core subjects singles-only, science doubles limited, morning preference, even distribution).

**Tip** — Availability grids only show lesson-type periods - set those up in Period Setup first if the grid is empty.

## ■ 7.4 Generate

Run the automatic timetable generator to place all lesson cards into time slots. Verify feasibility first, generate a scored draft, review unplaced lessons and rule relaxations, then manage saved versions (activate, archive, delete), partial regeneration, and importing cards from a previous term.

- 1 Navigate to Timetable > Generate. In Generate New Timetable, enter a Timetable Name, then pick the Year and Term; the page shows how many lesson cards and lesson periods it found.
- 2 Click Verify Data first. This checks whether every card can be placed and reports unplaced cards, KICD allocation advisories, and any setting conflicts - fix issues before generating.
- 3 Click Generate Timetable (or Regenerate Timetable if a draft already exists for that term). Generation produces a scored draft; the result card shows the score, placed vs total demands, unplaced lessons with reasons, and which rules were bent to fit.
- 4 From the result, click View Timetable or Edit Timetable to inspect and fine-tune the draft.
- 5 In Saved Versions, use the row menu (three dots) to View a version, Set as Active, Archive the active one, or Delete a non-active version.
- 6 To regenerate only part of the timetable, use Partial Regeneration: pick a Source Timetable, tick the Forms (and optional Streams) to redo, keep or clear Keep pinned entries, and click Regenerate Selected.
- 7 To reuse cards from an earlier term, use Import from Previous: choose the Source Year and Term, click Preview Import to see how many cards will clone and any unmapped teachers, then click Import.

### FIELDS ON THIS SCREEN

Timetable Name

Year / Term

Source Timetable (partial regen)

Forms / Streams (partial regen)

Keep pinned entries

Source Year / Source Term (import)

**Tip** — Always run Verify Data before generating - it surfaces cards that cannot be placed and configuration conflicts up front.

**Tip** — A score of 90%+ is good, 70-89% is acceptable, below 70% needs attention; check the unplaced lessons and relaxations listed on the result.

**Tip** — Generation is disabled until at least one lesson card exists for the selected term and year.

**Tip** — Only one version can be Active at a time; setting a version active is what publishes it to viewers.

**Take care** — Generating (or Regenerating) for a term that already has a draft replaces that existing draft with a fresh generation.

**Take care** — Deleting a version permanently removes its generated layout (lesson cards, periods, and settings are kept). Partial regeneration overwrites the selected classes in the source timetable - keep pinned entries checked to preserve manually placed lessons.

## 7.5 View Timetable

View a generated timetable by class, by teacher, as a master grid, by room, plus teacher workload and a quality audit. Print or export any view to PDF or CSV.

- 1 Navigate to Timetable > View Timetable. Pick a Version from the selector at the top (the active version is selected by default).
- 2 On the By Class tab, choose a Form and Stream to render that class's weekly grid; any unplaced cards for the class appear in a banner above the grid.
- 3 Switch to the By Teacher tab and pick a teacher to see their personal timetable, or the By Room tab and pick a room to see its usage.
- 4 Open the Master View tab to see every class stacked in one grid; from here you can drag lessons and right-click cells to pin/remove (changes save immediately).
- 5 Open the Workload tab to review each teacher's allocated vs placed periods and utilization, or the Quality tab to audit idle gaps, similar-skill adjacencies, monotony, and setting conflicts.
- 6 Use Print to print the current view, CSV to export the class or teacher grid as a spreadsheet, and PDF to download a formatted class, teacher, or master timetable.
- 7 Double periods appear merged across their two slots and are labelled Double; pinned lessons show a pin marker.

### FIELDS ON THIS SCREEN

Version

Form / Stream (By Class)

Teacher (By Teacher)

Room (By Room)

**Tip** — Class views show teachers by first name (students don't know initials); teacher and master views show initials.

**Tip** — The Quality tab explains why a metric is off - many adjacency or morning/afternoon imbalances trace back to availability locks flagged under setting conflicts.

**Tip** — CSV export is available for the By Class and By Teacher views; use PDF for a print-ready master timetable.

## 7.6 Edit Timetable

Manually fine-tune a generated timetable on a master grid: drag lessons between slots, swap two lessons, drop unplaced cards into free periods, and pin lessons so regeneration won't move them. Every change saves automatically with undo/redo.

- 1 Navigate to Timetable > Edit Timetable and pick a Version (the active one is selected by default).



- 2 Drag a lesson cell to an empty slot to move it, or drop it onto another lesson in the same class to swap the two. Changes save automatically and a toast confirms or warns of any conflict.
- 3 Drag a card from the Unplaced Cards sidebar (grouped by class) onto a free period in that same class's row to place it; the sidebar count drops as cards are placed.
- 4 Right-click any lesson cell to Pin/Unpin it (pinned lessons show a lock and cannot be dragged) or to Remove it from the grid.
- 5 Confirm removals in the dialog; a removed lesson returns to the Unplaced Cards list rather than being deleted.
- 6 Use the Undo and Redo buttons (or Ctrl+Z / Ctrl+Shift+Z) to reverse or replay moves, swaps, placements, and removals - up to 50 steps.
- 7 A card can only be dropped into a slot belonging to its own class; dropping it on another class's row is rejected.

**Tip** — Pin lessons you're happy with before running a partial regeneration - pinned entries are preserved when Keep pinned entries is checked on the Generate page.

**Tip** — Amber warning toasts mean the move was saved but breaks a soft rule; red toasts mean a hard conflict blocked it.

**Tip** — Undo/redo history is cleared when you switch to a different version.

**Take care** — Edits (moves, swaps, removals, pins) save immediately to the selected version - there is no separate save button. Removing a lesson takes it off the grid (it becomes unplaced) until you place it again.

## ■ 7.7 Card Relationships

Define scheduling rules between two specific lesson cards (or single-card rules) - for example keeping two subjects on the same day, consecutive, in the same room, or apart. The generator honors these when placing lessons.

- 1 Navigate to Timetable > Card Relationships. Set the Year and Term filters; relationships are scoped to a term and year.
- 2 Click Add Relationship, then pick Card A from the searchable list of lesson cards for that term.
- 3 Choose a Relationship Type (e.g. Same Day, Not Same Day, Consecutive, Same Time (Parallel), A Before B, Min/Max Gap, Same Room, Not Last Period, Max Per Day).
- 4 Pick Card B if the type requires it; for gap and per-day types, enter the numeric parameter (e.g. minimum gap periods).
- 5 Tick Enforce strictly (hard constraint) to make it mandatory, keep Active checked, and click Add Relationship.
- 6 Use the search box to filter, sort columns by clicking headers, and page through the list with the pagination controls.
- 7 Edit a relationship with the pencil icon or remove it with the trash icon (confirming in the dialog).

## FIELDS ON THIS SCREEN

Year / Term

Card A

Relationship Type

Card B

Parameter (min/max gap, max per day)

Enforce strictly (hard constraint)

Active

**Tip** — Single-card rules (Not Last Period, Not First Period, Max Per Day) don't need a Card B - the Card B field disables automatically.

**Tip** — Card A and Card B lists only show lesson cards for the selected term and year, so set the filters first.

**Tip** — Use soft (non-hard) relationships as preferences when a hard rule would make the timetable infeasible.

**Take care** — Deleting a relationship is permanent and cannot be undone.

## 7.8 Substitutions

Handle day-to-day teacher absences: mark a teacher absent for a date, find available substitute teachers for each of their lessons that day, assign covers in bulk, and track each substitution's status.

- 1 Navigate to Timetable > Substitutions. Pick the Date at the top; the table lists any substitutions already scheduled for that day (drawn from the active timetable).
- 2 Click Mark Teacher Absent, search and select the absent Teacher, and optionally enter a Reason - their lessons for that day load automatically.
- 3 For each lesson, click Find Substitute to list teachers free in that period, then click a teacher to assign them as the cover.
- 4 Review the assigned/total count in the footer and click Save All Substitutions to create every assigned cover at once.
- 5 Back on the table, review each row (period, subject, class, original teacher, substitute, status).
- 6 Click the pencil icon on a row to Update Status (Pending, Confirmed, Completed, or Cancelled) and save.
- 7 Use Print to print the day's substitution list, and the trash icon to delete a substitution.

## FIELDS ON THIS SCREEN

Date

Teacher (to mark absent)

Reason

Substitute teacher (per lesson)

Status (Pending / Confirmed / Completed / Cancelled)

**Tip** — Find Substitute only lists teachers who are actually free in that specific period, so you won't double-book anyone.

**Tip** — You can assign covers for several lessons and create them together with Save All Substitutions.

**Tip** — Substitutions read from the currently active timetable version - make sure the right version is active.

**Take care** — Deleting a substitution is permanent and cannot be undone.

# Module 08

## Online Classes

Run virtual learning: schedule and host live video lessons, and create, distribute and grade homework assignments.

### 8.1 Video Classes

Schedule live virtual classroom sessions, then join or start them at the scheduled time.

- 1 Navigate to Online Classes > Video Classes (/online-classes/videos).
- 2 Review the Upcoming, Live Now and Total Classes stat cards.
- 3 Click Schedule Class, then choose the Class, Subject and Teacher, set the Date, Time and Duration, and optionally add a Description.
- 4 Click Schedule Class in the dialog to save the session.
- 5 Use the search box and the Class / Status filters to find a class in the table; sort by clicking a column header.
- 6 When a class is scheduled or live, click Start / Join to enter the video conference room.
- 7 Use the pencil icon to edit a class or the trash icon to delete it (confirm in the dialog).
- 8 Use the CSV or PDF buttons to export the class list.

#### FIELDS ON THIS SCREEN

Class Subject Teacher/Trainer Date Time Duration Description

**Tip** — Class, Subject, Teacher, Date and Time are all required to schedule.

**Tip** — A live class shows a pulsing 'Live Now' badge and a Join button; a scheduled one shows Start.

**Take care** — Deleting a video class cannot be undone.

**Take care** — Scheduling and management actions are available to staff only; students can view and join.

### 8.2 Homework

Create homework assignments with attachments and due dates, then track submissions and grade them.

- 1 Navigate to Online Classes > Homework (/online-classes/homework).

- 2 Review the stat cards (Active, Pending Grading, Past Due for staff; Assigned, Submitted, To Do for students).
- 3 Click Create Homework, choose the Class and Subject, enter a Title and Instructions, and set the Due Date and Due Time.
- 4 Toggle Gradable (and set Total Marks) and Allow Late Submission as needed, attach files by drag-and-drop, then click Create Homework.
- 5 Use the search box and the Class / Status filters to find assignments; sort by clicking a column header.
- 6 Click a homework row to open its detail page and review or grade student submissions.
- 7 Use the pencil icon to edit an assignment or the trash icon to delete it (confirm in the dialog).
- 8 Use the CSV or PDF buttons to export the homework list.

## FIELDS ON THIS SCREEN

Class

Subject

Title

Instructions

Due Date

Due Time

Gradable

Total Marks

Allow Late Submission

Attachments

**Tip** — Class, Subject, Title, Due Date and Due Time are required to create.

**Tip** — Attachments accept PDF, DOC, DOCX, JPG and PNG files (max 10 MB each); when editing, existing attachments can be kept or removed individually.

**Take care** — Deleting a homework assignment also deletes all student submissions and cannot be undone.

**Take care** — Create/edit/delete are available to staff only; students see their own status and score.

# Module 09

## Library Manager

Run the school library end to end: track the book collection, issue and return books, collect fines, generate reports, verify stock, and manage acquisition requests.

### ■ 9.1 Library Dashboard

Overview of the library — key counts, recent activity, overdue books, most-borrowed titles, and policy settings.

- 1 Navigate to Library Manager > Dashboard (/library).
- 2 Review the six stat cards at the top: Total Books, Available, Issued, Overdue, Reservations, and Outstanding Fines.
- 3 Scan the Recent Activity panel to see who recently borrowed or returned books, and the Overdue Books panel for students who need follow-up.
- 4 Check the Most Borrowed Books and Books by Type charts to understand collection usage.
- 5 Click Send Reminders to send SMS overdue reminders to parents of students with overdue books, then confirm in the dialog.
- 6 Click Settings to open the Library Settings drawer, adjust loan periods, fines, renewals, reservations, reminders and member limits, then click Save Settings.

#### FIELDS ON THIS SCREEN

Default Loan Period (days)

Max Books per Student

Max Books per Staff

Fine per Day (KES)

Lost Book Fine (KES)

Damaged Book Fine (KES)

Allow book renewals

Max Renewals per Issue

Allow book reservations

Enable SMS Reminders

Remind After (days)

Reminder SMS Template

Barcode Prefix

**Tip** — Loan period, max books per student/staff, fine-per-day, renewals and reservation rules are all configured in the Settings drawer and drive the rest of the module.

**Tip** — Students see a simplified 'My Library' view here showing their own borrowed books and fines.

**Take care** — Send Reminders deducts from your school's SMS balance — one SMS is sent per parent of an overdue student.

### ■ 9.2 Books Inventory

Manage the book catalog — add, edit, delete titles, bulk-import via CSV, print barcode labels, and export

the collection.

- 1 Navigate to Library Manager > Books Inventory (/library/inventory).
- 2 Use the search box and the Type, Form and Status filters to find books; adjust items-per-page as needed.
- 3 Click Add Book to open the drawer; optionally enter an ISBN and click Auto-fetch to pull Title/Author/Publisher automatically.
- 4 Fill in the required fields (Title, Author, Type, Copies) plus optional details, drag-and-drop a cover image, then click Add Book.
- 5 Click any row (or the pencil icon) to edit a book, or the trash icon to delete it (confirm in the dialog).
- 6 Click the barcode icon on a row to generate printable barcode labels for each copy.
- 7 Use Bulk Import to upload a CSV — download the template first, drop the file, review the preview, then click Import Books.
- 8 Use the CSV or PDF buttons to export the currently filtered list.

#### FIELDS ON THIS SCREEN

ISBN Title Author Publisher Serial Number Type Form/Class Copies Year of Edition Edition  
 Language Category Genre E-book Type Replacement Cost (KES) Location Status Cover Image  
 Description Comments

**Tip** — Type, Copies, Title and Author are the required fields; the Auto-fetch button only needs a valid 10+ character ISBN.

**Tip** — The bulk-import preview flags whether the required columns (title, author, copies, type) are present before you import.

**Take care** — Deleting a book cannot be undone.

## ■ 9.3 Book Circulation

The issue-and-return hub: lend books to students, renew and return them, and manage the fines that result.

- 1 Navigate to Library Manager > Book Circulation (/library/circulation).
- 2 On the Circulation tab, review the Currently Issued, Overdue and Today's Issues stat cards, and filter the loans list by search, class or status.
- 3 Click Issue Book, search and select a Student and a Book, pick the Copy Number, optionally set a Due Date and comments, then click Issue Book.
- 4 For an active loan, click Renew to extend the due date, or Return to open the return drawer.
- 5 In the return drawer, choose the book Condition (good/fair/damaged/lost), review the calculated fine, optionally tick Waive all fines, then click Return Book.

- 6 Switch to the Fines tab to see total/collected/pending/waived amounts and the list of fines.
- 7 Click Pay on a fine to record a payment (enter the amount or use Pay Full), or Waive to cancel it.
- 8 Use Export CSV on either tab to download the current list.

## FIELDS ON THIS SCREEN

Student Book Copy Number Due Date Comments Condition Waive all fines for this return  
Payment Amount (KES)

**Tip** — If the selected book has tracked copies, the Copy Number becomes a dropdown of available copies with their condition and barcode.

**Tip** — Leaving the Due Date blank uses the default loan period from Library Settings.

**Tip** — Overdue fines are calculated automatically; a damaged return adds a surcharge and a lost book adds a larger one.

**Take care** — Returning a book as 'lost' or 'damaged' applies a condition surcharge fine unless you tick Waive.

**Take care** — Waiving a fine cannot be reversed.

## 9.4 Reports

Generate and export library reports across five tabs: Accession Register, Circulation, Overdue, Borrowing and By Category.

- 1 Navigate to Library Manager > Reports (/library/reports).
- 2 Select a tab: Accession Register, Circulation, Overdue, Borrowing, or By Category.
- 3 On Circulation and Borrowing, set the From and To dates (and, for Borrowing, an optional Form filter) to define the period.
- 4 Use the search box to narrow the table and sort columns by clicking their headers.
- 5 Click Print to print the report, or Export CSV (Categories/Genres on the By Category tab) to download the data.
- 6 On the Overdue tab, review the Overdue Books count and Total Estimated Fines summary cards to plan follow-ups.

## FIELDS ON THIS SCREEN

From To Search Form



**Tip** — Each tab shows an info banner explaining what the report is for and when to use it.

**Tip** — Circulation and Borrowing default to the last 30 days; change the date range to widen or narrow it.

## ■ 9.5 Stocktake

Physically verify the library inventory by scanning books against system records, then review found/missing/extra results.

- 1 Navigate to Library Manager > Stocktake (/library/stocktake).
- 2 On the Active Stocktake tab, if none is running, click Start New Stocktake, enter a Name (and optional Notes), then click Start Stocktake.
- 3 Scan each book's barcode or type its accession number into the scan box, set the Condition, and press Enter or click Scan.
- 4 Watch the progress bar and the Found / Damaged / Missing counters update; recently scanned items appear in the list below.
- 5 When finished, click Complete Stocktake to close the session.
- 6 Open the History tab and click View Report on any past stocktake to see the Found, Missing and Extra item lists.

### FIELDS ON THIS SCREEN

Name

Notes

Barcode / Accession Number

Condition

**Tip** — The scan box auto-focuses so you can scan continuously with a barcode reader.

**Tip** — Only one stocktake can be in progress at a time.

**Take care** — Completing a stocktake ends the active session and it cannot be reopened for further scanning.

## ■ 9.6 Acquisitions

Manage book purchase requests through their lifecycle: requested, approved/rejected, ordered, received, and cataloged.

- 1 Navigate to Library Manager > Acquisitions (/library/acquisitions).
- 2 Review the Total Requested, Approved, Total Spent and Pending stat cards.
- 3 Click New Request, optionally Auto-fetch from an ISBN, fill in Title, Author, Quantity, Unit Price, Vendor and Budget Year, then click Submit Request.

- 4 Use the status tabs (All, Requested, Approved, Ordered, Received, Cataloged, Rejected) plus search and budget-year filter to find requests.
- 5 For a requested item, click Approve or Reject; approved items can be marked Ordered, then Received.
- 6 For a received item, click Catalog to create the book records in the library inventory, then confirm in the dialog.
- 7 Use Export CSV to download the filtered acquisitions list.

## FIELDS ON THIS SCREEN

ISBN

Title

Author

Publisher

Quantity

Unit Price (KES)

Vendor

Budget Year

Notes

**Tip** — The estimated total is calculated live from Quantity x Unit Price as you type.

**Tip** — Cataloging a received request automatically creates the specified number of book copies in Books Inventory.

**Take care** — Rejecting an acquisition request cannot be undone.

**Take care** — Cataloging creates real book records in the inventory for the full quantity.

# Module 10

## Finance

Manage the school's money end to end: configure bank accounts and the chart of accounts, set fee structures and invoice students, collect fees (cash, bank, cheque or M-Pesa STK push), reconcile incoming M-Pesa payments, record government allocations, promissory notes, non-fee income, expenses and supplier payments, and produce payment and accounting reports. Create, edit and delete controls only appear if your role holds the matching finance permission.

### 10.1 Finance Settings

Set up the foundations Finance depends on: your school's bank accounts, the chart of accounts (ledgers), and how printed receipts look. This is the first place to visit before collecting any money.

- 1 Navigate to Finance > Finance Settings. The page opens on the Bank Accounts tab; the two other tabs are Ledger Accounts and Receipt Settings.
- 2 On the Bank Accounts tab, click Add Bank Account, then fill Bank Name, Branch, Account Name and Account Number (all required) and optionally pick an Account Type (Fees, Operations, Tuition or Others). Click Add Bank Account to save.
- 3 Edit a bank account with the pencil icon on its row (footer button becomes Update), or remove one with the trash icon and confirm in the Delete Bank Account dialog.
- 4 Open the Ledger Accounts tab to manage your chart of accounts. To load a ready-made set, click View Templates, review the Chart of Accounts / Summary / Kenya Tax Notes sub-tabs, then click Apply These Charts (it shows how many accounts will be added).
- 5 To add a single ledger, click Add Ledger, choose an Account Category (Assets, Expense, Income or Liabilities), then fill Sub Group, Ledger Name and Normal Balance (Debit or Credit); an optional Account Code and Description can be added. Click Add Ledger.
- 6 Use the account-category filter (All accounts) and the Search box to find ledgers; export the current list with the CSV button.
- 7 Open the Receipt Settings tab to choose a Receipt Printer Format: Thermal Printer (narrow 42-character) or Epson LX-350 (A4 continuous feed), each with a live preview.
- 8 Still on Receipt Settings, set the Font Family and Font Size for printed receipts, then click Save Receipt Settings.

#### FIELDS ON THIS SCREEN

Bank Name   Branch   Account Name   Account Number   Account Type   Account Category   Account Code  
Sub Group   Ledger Name   Normal Balance   Receipt Printer Format   Font Family   Font Size

**Tip** — The bank accounts you add here are what appear in the Bank Account dropdowns on Collect Fees, Government Allocations, Expenses and Pay Suppliers.

**Tip** — Choosing the Epson (A4) or Thermal receipt format here changes the layout of every fee/income/expense receipt printed across Finance.

**Take care** — Deleting a bank account or ledger account cannot be undone. Both deletes require confirmation in a dialog that names the item.

**Take care** — Applying a chart-of-accounts template adds every account in that template to your ledger at once, so review the count before clicking Apply These Charts.

## ■ 10.2 Fees / Invoicing

Define fee voteheads and fee structures, then generate invoices for a whole class or for one student. This tab also handles recurring (carried-forward) fees, per-student adjustments, and closing a term to write balances forward.

- 1 Navigate to Finance > Fees / Invoicing. The page has seven tabs: Voteheads, Gov Allocation, Set Fees & Invoice, Recurring Fees, Invoice per Student, Fees Adjustment and Close Term.
- 2 On the Set Fees & Invoice tab, click Set Fees to open the fee-structure sheet, choose Class, Term and Year, then click Load Voteheads and type an Amount (KES) against each votehead. Click Save Fee Structure.
- 3 To invoice a whole class, find the saved (Not Invoiced) row and click Generate; the Generate Invoices dialog shows the student count and total per student. Click Generate Invoices to create every student's invoice.
- 4 To invoice one learner, open the Invoice per Student tab, search the Student, pick Term and Year, click Load Invoice, and (if none exists yet) click Generate Invoice for Student.
- 5 Review an existing invoice as a table of Votehead, Amount, Discount, Paid and Balance. To correct a line, click the pencil (Edit), change the values inline, and click the green check (Save).
- 6 Download paperwork from the top-right of a loaded invoice: Invoice PDF for the invoice, Statement for the full statement, or Email Invoice to send it to the parents.
- 7 Use Recurring Fees to carry invoice amounts from one term to another via the Select Source, Choose Voteheads, Select Destination and Confirm steps, then click Carry Forward.
- 8 Use Fees Adjustment to tweak one votehead's amount per student (Load, edit the Amount column, Save Adjustments), and Close Term to write Balance Brought Forward into the next term (Preview Balances, then Close Term & Write B/F).

### FIELDS ON THIS SCREEN

Class Term Year Votehead Amount (KES) Applies To Discount Paid Balance

**Tip** — Voteheads' priority sets the order money is applied when collecting fees. Lower numbers are paid first, and B/F (brought forward) is always paid first.

**Tip** — For an already-invoiced class you can bulk-edit amounts with the Edit button (Edit Fees (All Students) > Update All Students) or email the whole class with the Email button; discounts and payments are preserved.

**Tip** — System voteheads (e.g. B/F) are locked and cannot be deleted; their delete control shows a padlock.

**Take care** — Generating invoices cannot be undone. After generating, use the Fees Adjustment tab to change individual invoices rather than regenerating.

**Take care** — Deleting a fee-structure votehead that has already been invoiced removes all student invoice lines for it, and is blocked if any student has paid against it.

**Take care** — Closing a term writes B/F rows into the next term and cannot be undone. Review the preview and the confirmation dialog (which states the student count and total balance) before confirming.

### 10.3 Collect Fees

Record a student's fee payment and issue a receipt. Cash, bank, cheque and other modes are recorded directly; when the mode is Mobile Money (M-Pesa) and the school has M-Pesa enabled, you instead send an STK prompt to the parent's phone and the payment is confirmed via M-Pesa Transactions.

- 1 Navigate to Finance > Collect Fees. Search the Student in the combobox (type at least 2 characters of admission number or name), pick the Term and Year, then click Load Balance.
- 2 Review the fee balance table (Votehead, Invoiced, Discount, Paid, Balance). Use Invoice, Statement or Payment History on the right of the heading to view supporting documents.
- 3 In the Record Payment panel enter the Amount (KES); the payment is auto-distributed across outstanding voteheads. Adjust any allocation by editing the boxes, or click Auto-fill to reset. Overpayment shows as C/F (Overpayment).
- 4 Choose a Payment Mode. For Cash, Direct Deposit, Cheque and similar modes also set the Bank Account, Date Paid, and Cheque/Reference # / Bank Date as needed.
- 5 For a direct (non-M-Pesa) mode, click Collect Payment, check the details in the Confirm Payment dialog, and click Confirm Payment. The receipt opens automatically in a side panel.
- 6 For Mobile Money (M-Pesa) with M-Pesa enabled, the button becomes Send M-Pesa Prompt: enter the Parent Phone, click it, and an STK push is sent to that number. A status modal then waits for the parent to enter their PIN.
- 7 When the modal shows Payment received, click Reconcile & Issue Receipt to jump to M-Pesa Transactions for that payment. You may also click Continue in background and keep working; a notification arrives when the payment lands.
- 8 From the open receipt panel you can Print (uses your Thermal/Epson receipt setting), Email Receipt to the parents (tick Father/Mother or type addresses), or Cancel Receipt if it was recorded in error.

#### FIELDS ON THIS SCREEN

Student Term Year Amount (KES) Payment Mode Parent Phone (for M-Pesa prompt) Bank Account  
Date Paid Cheque/Reference # Bank Date Payment Distribution

**Tip** — The M-Pesa status modal does not block you. If the parent is slow to pay, close it and a notification will alert you when the money arrives.

**Tip** — Emailing a receipt pre-loads the father's and mother's addresses on file; you can add extra comma-separated addresses in the dialog.

**Tip** — Payment History lets you re-open and reprint any earlier receipt for the same student and term.

**Take care** — Sending an M-Pesa prompt only starts the payment. The money is not collected until the parent enters their PIN and Safaricom confirms it; the payment then appears in M-Pesa Transactions to be reconciled before a fee receipt is issued.

**Take care** — Cancelling a receipt reverses the payment from the student's invoice and marks the receipt CANCELLED. The record is kept for audit but the reversal cannot be undone.

## ■ 10.4 M-Pesa Transactions

The reconciliation queue for incoming M-Pesa payments. Each payment must be matched to a student's admission number and allocated to fee voteheads before a receipt is issued; payments that are not fees (or are wrong) can be rejected. An exact copy of Safaricom's response is always kept for every transaction.

- 1 Navigate to Finance > M-Pesa Transactions. The summary chips show Review queue, Reconciled, Failed and In queue (KES); the filter defaults to the Review queue (status Needs reconciliation).
- 2 Use the status dropdown (Review queue, Reconciled, Failed, Rejected, All) and the Search box (code, phone, admno or name) to find a transaction, or click Refresh to reload.
- 3 For a payment that needs reconciling, click Reconcile to open the Reconcile M-Pesa Payment dialog, which shows the amount, payer and M-Pesa code.
- 4 Enter the student's Admission No and confirm the Term and Year, then click Load balance & allocate. The fixed M-Pesa amount is auto-spread across the student's voteheads by priority.
- 5 Adjust the per-votehead allocations if needed. Any amount left over shows as C/F (credit); over-allocating past the payment is blocked. Add an optional Note (e.g. for a tour contribution that is not a fee).
- 6 Click Post & Issue Receipt to write the payment to the fee ledger and generate the receipt. A confirmation toast reports the receipt number and whether the receipt was sent to the parent.
- 7 For a reconciled row, use the send (paper-plane) button to resend the receipt to the parent by SMS/email.
- 8 To inspect the raw Safaricom payload for any transaction, click the code (< >) button to open Safaricom Response (verbatim) — the exact callback stored for that record.
- 9 To reject a payment that is not a valid fee (accidental, reversal or spam), click the ban icon, type a required reason in Mark as Wrong Transaction, and confirm; it will not post to any student.

## FIELDS ON THIS SCREEN

Status filter

Search

Admission No

Term

Year

Votehead allocation

Note

Reason (for reject)

**Tip** — Every accepted (reconciled) transaction is mapped to a student admission number, and the verbatim Safaricom response is retained on the record for audit.

**Tip** — A non-fee payment (for example a tour contribution) can still be reconciled to the student with a Note describing what it was for.

**Tip** — Opening this page from a payment notification (the ?tx link) jumps straight to that transaction — the Reconcile dialog if it still needs reconciling, or its Safaricom response otherwise.

**Take care** — Reconcile against the correct admission number. Posting writes the payment to that student's fee ledger and issues a receipt, so a wrong admno credits the wrong student.

**Take care** — Marking a transaction as wrong flags it as not a valid fee and requires a reason; it will not post to any student. Reconcile and reject are effectively final states — treat them as not easily reversible.

## ■ 10.5 Government Allocations

Record government fund receipts from the Ministry of Education, split by votehead across the Operations or Tuition account, and print a receipt.

- 1 Navigate to Finance > Government Allocations. Select the Year, Term and Account (Operations or Tuition) in the filter bar.
- 2 Click Continue to load that account's government voteheads (if none show, add them first under Fee Settings / Gov. Voteheads).
- 3 Type the amount received into each relevant votehead row; the Total Amount updates in the header and in the Payment Details panel.
- 4 In Payment Details, choose the Mode of Payment and Bank Account; for cheque/deposit modes also fill Cheque / Reference # and Bank Date, and set the Date Paid.
- 5 Click Save & Print Receipt (enabled once the total is above zero and a mode is chosen).
- 6 Confirm the amount and account in the Confirm Government Payment dialog, then click Confirm Payment.
- 7 In the Government Allocation Receipt panel, click Print (thermal or A4 per your receipt settings) or Close. Use Payment History, CSV or PDF to review or export past allocations.

## FIELDS ON THIS SCREEN

Year

Term

Account

Votehead amounts

Mode of Payment

Bank Account

Cheque / Reference #

Bank Date

Date Paid

**Tip** — Government voteheads come from Fee Settings; if the list is empty, set them up there before recording an allocation.

**Tip** — Payment History shows all past allocations, with cancelled receipts struck through.

**Take care** — Cancelling an allocation receipt marks it CANCELLED and cannot be undone. Confirm via the Cancel Receipt dialog (Keep Receipt / Yes, Cancel Receipt).

## ■ 10.6 Promissory Notes

Record and track a parent's promise to pay fees by a future date, monitor pending/honoured/overdue status, auto-reconcile promises against payments, and send SMS reminders.

- 1 Navigate to Finance > Promissory Notes. The summary cards show Pending Notes, Total Promised, Total Honoured and Overdue.
- 2 Click New Note to open the create sheet, then search and select the Student in the combobox.
- 3 Set the Promised Payment Date (must be a future date), enter the Amount Promised (KES), and optionally add Remarks.
- 4 Click Save Note to record the promise; the list and alert banner refresh.
- 5 Use the From, To, Status filters and the search box to find notes; export with CSV or PDF.
- 6 Click Reconcile Now to auto-match outstanding promises against payments already received.
- 7 From a note's row menu or its detail view, choose Send SMS Reminder, review or edit the prefilled message, and click Send SMS.

### FIELDS ON THIS SCREEN

Student

Promised Payment Date

Amount Promised (KES)

Remarks

From

To

Status

**Tip** — Status badges (Pending, Expiring, Overdue, Honoured, Cancelled) tell you at a glance which promises need chasing.

**Tip** — The reminder SMS is prefilled but fully editable before you send it.

**Take care** — Deleting a promissory note permanently removes it (unlike most Finance records, which are only marked cancelled). The Delete Promissory Note dialog names the parent, amount and date and states it cannot be undone; delete is only available for pending notes.



## 10.7 Collect Income

Record non-fee income such as rentals, events and other collections, and generate a receipt for each.

- 1 Navigate to Finance > Collect Income. The cards show Total Records, Total Income and Period for the selected range.
- 2 Click New Income to open the Record Income sheet.
- 3 Choose the Income Group, then the Income Ledger (it unlocks once a group is selected).
- 4 Fill Received From, optionally Invoice / Ref Number, the Date and the Amount (KES).
- 5 Choose the Mode of Payment and, if relevant, the Bank Account, Cheque / Reference # and Bank Date, then enter a Description.
- 6 Click Save & Generate Receipt; the Receipt sheet opens automatically. Click Print Receipt or Close.
- 7 Use the From, To and Group filters or Export CSV to review income; reprint any earlier receipt via a row's View Details > Reprint Receipt.

### FIELDS ON THIS SCREEN

Income Group   Income Ledger   Received From   Invoice / Ref Number   Date   Amount (KES)   Mode of Payment  
Bank Account   Cheque / Reference #   Bank Date   Description

**Tip** — The Income Ledger list depends on the Income Group you pick first.

**Tip** — All required fields are marked with an asterisk; a toast tells you if any are missing when you save.

**Take care** — Cancelling an income receipt marks it cancelled for audit and cannot be undone (Cancel Receipt dialog: No, Keep It / Cancel Receipt).

## 10.8 Expenses

Record and manage school expenses, payments and disbursements. Each expense produces a Payment Voucher with signature lines.

- 1 Navigate to Finance > Expenses. The cards summarise Total Expenses, Transactions, Top Category and Voided.
- 2 Click Record Expense to open the sheet, then choose the Expense Group and Expense Ledger.
- 3 Enter the Payee / Paid To, optionally the Invoice Number, the Date and the Amount (KES).
- 4 Choose the Payment Mode (Cash, Cheque, M-Pesa or Bank Transfer); the mode reveals the relevant Bank Account, Cheque Number or M-Pesa Reference fields. Add a Description if useful.
- 5 Click Record Expense; the Payment Voucher sheet opens. Click Print Voucher or Close.
- 6 Use the From, To, Group and Status filters, CSV or PDF to review expenses; reprint a voucher via a row's Print Voucher.

- 7 Edit an existing expense from its row menu (Edit > Update Expense), or void one you cannot delete.

## FIELDS ON THIS SCREEN

Expense Group Expense Ledger Payee / Paid To Invoice Number Date Amount (KES) Payment Mode  
Bank Account Cheque Number M-Pesa Reference Description Void Reason

**Tip** — The Expense Ledger list is driven by the Expense Group you select first.

**Tip** — The Status filter (All / Active / Voided) helps separate live expenses from voided ones.

**Take care** — Voiding an expense marks it voided for audit and cannot be undone. The Void Expense dialog requires a Void Reason before the Void Expense button enables.

## 10.9 Pay Suppliers

See suppliers with outstanding balances, allocate a payment across their unpaid invoices, and generate a Payment Voucher. Payments can be voided (reversed), which restores the invoice balance.

- 1 Navigate to Finance > Pay Suppliers. The cards show Total Outstanding, Total Invoiced, Total Paid and Suppliers; the table lists each supplier's invoices and balance.
- 2 Click Pay on a supplier's row to open the payment sheet, which loads that supplier's outstanding invoices with each Pay Amount defaulted to its full balance.
- 3 Set the Payment Date and Payment Method (Cash, Cheque, M-Pesa or Bank Transfer), and add Bank Account, Payment Reference and Cheque Number as applicable.
- 4 Optionally pick an Expense Group and Expense Ledger and add a Memo to book the expense.
- 5 Adjust each invoice's Pay Amount (it cannot exceed that invoice's balance; at least one must be above zero). The Total Payment updates as you type.
- 6 Click Record Payment — KES {total}; the Payment Voucher sheet opens. Click Print Voucher.
- 7 Review a supplier's payments with History or all their invoices with Invoices; reprint a voucher from History with the printer icon.

## FIELDS ON THIS SCREEN

Payment Date Payment Method Bank Account Payment Reference Cheque Number Expense Group  
Expense Ledger Memo Pay Amount Reason for Voiding

**Tip** — The Cheque Number field only appears when the Payment Method is Cheque.

**Tip** — History badges each payment as Active, Voided or Reversal so you can see the net position.

**Take care** — Voiding a supplier payment cannot be undone. It marks the original payment voided and creates a negative reversal entry that restores the invoice balance; the Void Payment dialog requires a Reason for Voiding before it enables.

## ■ 10.10 Payment Reports

View and export fee-payment reports: individual receipts, outstanding balances (current or as at a historical date), fees summaries, arrears and votehead analysis. Each report can be exported to PDF and CSV.

- 1 Navigate to Finance > Payment Reports. Choose one of the six tabs: Receipts Analysis, Fees Balances, Balances As At Date, Fees Summary, Fees Arrears or Votehead Analysis.
- 2 On Receipts Analysis, set the From Date, To Date and Class, then click Generate Report to list receipts with totals collected, receipts, students and cancelled counts.
- 3 On Fees Balances, pick Class, Term and Year (and optional Status, Min Balance, Max Balance) and click Generate Report to see outstanding balances per student.
- 4 On Balances As At Date, set the As At Date plus the Max Year / Max Term cutoff and class, then Generate Report to see historical balances as at that date.
- 5 On Fees Summary choose Class, Term and Year for a per-student votehead matrix; on Fees Arrears and Votehead Analysis choose at least the Year (Term and Class optional) and click Generate Report.
- 6 Export any generated report with the PDF or CSV buttons at the top right, and page through large results with Show items-per-page and Previous/Next.
- 7 From Receipts Analysis or a student's balance drawer, use the row actions to View Details, Print, Send Email or Cancel Receipt, and from Fees Balances use Reminder (Print Letters) or Email All to chase debtors.

### FIELDS ON THIS SCREEN

From Date

To Date

Class

Term

Year

Status

Min Balance

Max Balance

As At Date

**Tip** — Each tab remembers its own filters; you must click Generate Report after changing them.

**Tip** — Class, Term and Year labels follow your school type, so they may read Form/Term/Year or Class/Term/Year.

**Take care** — Cancelling a receipt from the Receipts Analysis tab marks it cancelled and cannot be undone; confirm in the Cancel Receipt dialog.

## ■ 10.11 Accounting Reports

Financial statements and statutory reports: income & expenditure (P&L), expense and income analysis, payables, payroll deductions, trial balance, bank reconciliation and a voucher register. Most tabs export to CSV and PDF (some

to CSV only).

- 1 Navigate to Finance > Accounting Reports. Choose one of the eight tabs: Income & Expenditure, Expenses, Income, Payables, Payroll, Trial Balance, Bank Recon or Voucher Register.
- 2 On Income & Expenditure, set From and To dates and click Generate to see the P&L-style statement plus a monthly cash-flow table.
- 3 On Expenses or Income, set the date range (and Group / Search) and click Generate, then switch between Summary View, Detail View and (Expenses) Payment Mode.
- 4 On Payables, use the sub-tabs Accounts Payable, Invoice Aging, Supplier Payments and Promissory Notes to review what the school owes and how it is aged.
- 5 On Payroll, use Statutory Deductions (pick Month and Year for PAYE/NSSF/SHIF/AHL) or YTD Staff Earnings (pick Year), then click Generate.
- 6 On Trial Balance choose the As At date; on Bank Recon set From, To and Bank Account; on Voucher Register set From, To, Type and Search, then click Generate.
- 7 Export a generated report with Export CSV or Export PDF. Note some reports are CSV-only: Payables > Promissory Notes, Payroll > YTD Staff Earnings, Trial Balance and Bank Recon.

#### FIELDS ON THIS SCREEN

From

To

Group

Bank Account

Month

Year

As At

Type

Search

**Tip** — The primary button here is Generate (not Generate Report), and exports are labelled Export CSV / Export PDF.

**Tip** — Use Income & Expenditure for the school's surplus/deficit and monthly cash flow at a glance.

# Module 11

## Pocket Money

Operate student pocket-money wallets: deposit and withdraw funds, track per-student balances, and review the full transaction log.

### 11.1 Pocket Money

Deposit to and withdraw from student wallets, view balances, and open each student's transaction history.

- 1 Navigate to Pocket Money (/pocket-money).
- 2 Review the Total Students, Total Balance, Total Debt and Net Position stat cards.
- 3 Use the search box and the Form filter to find students; sort by Name, Balance or Last Updated.
- 4 Click Deposit (top toolbar), search and select a student, enter the Amount (KES), review the balance preview, then click Deposit Funds.
- 5 For a student with a positive balance, click Withdraw on their row, enter the Amount, then click Withdraw Funds.
- 6 Click a student row (or the eye icon) to open the Transaction History drawer for that student.
- 7 Use the CSV or PDF buttons to export the current balances list.

#### FIELDS ON THIS SCREEN

Student

Amount (KES)

**Tip** — The deposit drawer shows a live preview of the student's current and new balance.

**Tip** — The Withdraw button only appears for students who have a positive balance.

**Take care** — A withdrawal removes money from the student's wallet and cannot exceed the available balance; the app blocks over-withdrawals.

**Take care** — Deposits and withdrawals are recorded immediately as transactions.

### 11.2 Transactions

Browse and export every pocket-money deposit and withdrawal across all students.

- 1 Navigate to Pocket Money > Transactions (/pocket-money/transactions).

- 2 Review the Total Deposits and Total Withdrawals summary cards.
- 3 Filter by From / To dates, search by admission number or student name, and set the Type filter (Deposits or Withdrawals).
- 4 Browse the transactions table with per-page and numbered pagination controls.
- 5 Click Clear to reset all active filters.
- 6 Click Export CSV to download the filtered transactions (up to 5,000 rows).

## FIELDS ON THIS SCREEN

From

To

Search

Type

**Tip** — Each row is colour-coded: deposits show in green, withdrawals in red.

**Tip** — The summary totals reflect the transactions returned by your current filters.

# Module 12

## Payroll

Run monthly staff payroll for your school: configure Kenyan statutory rates (PAYE, NSSF, SHIF, Housing Levy, Pension), define allowances, deductions and tax reliefs, generate payslips that auto-compute PAYE/NSSF/SHIF/AHL, then view, print and export statutory reports.

### ■ 12.1 Payroll Dashboard

The Payroll landing page. It shows headline figures (staff on payroll, this month's gross and net, pending runs), a table of recent payroll runs, and quick-action shortcuts.

- 1 Navigate to Payroll > Dashboard.
- 2 Read the four stat cards at the top: Total Staff on Payroll, This Month's Gross, This Month's Net, and Pending Runs.
- 3 Scroll to the Recent Payroll Runs table to see each run's period, staff count, gross pay, net pay, status badge (Draft, Pending Approval, Approved, Rejected or Void), who generated it, and the date.
- 4 Click View All (top-right of the Recent Payroll Runs card) to open the full Payslips list.
- 5 Use the Quick Actions cards at the bottom to jump straight to Generate Payslips, View Payslips, or Payroll Settings.
- 6 Click the Generate Payslips button in the page header (top-right) to start a new payroll run.
- 7 If a red error panel appears, click Try Again to reload the dashboard data.

**Tip** — This Month's Gross and Net reflect the most recent processed period, not a live running total.

**Tip** — Configure statutory rates in Payroll Settings before running your first payroll so PAYE, NSSF and SHIF compute correctly.

### ■ 12.2 Settings (Statutory Rates)

Configure organisation details and the Kenyan statutory rates the payroll engine uses. Six tabs: General, PAYE Tax Brackets, NSSF, SHIF, Housing Levy, and Pension. Each rate tab shows a live calculation preview for a KES 50,000 example salary.

- 1 Navigate to Payroll > Settings.
- 2 On the General tab, fill in Payslip Number Prefix, Currency, Organization Name, KRA PIN, NSSF Employer No, SHIF Employer No, and Organization Address; toggle Auto-Approve Payroll on to skip manual review of generated payslips, then click Save Settings.

- 3 Open the PAYE Tax Brackets tab to manage income bands: click Add Tax Bracket to define a Minimum Band, Maximum Band (leave empty for the top bracket) and Tax Rate, or use the pencil/trash icons to edit or delete a band.
- 4 On the PAYE tab, click Reset to Default to replace all brackets with the Kenya Finance Act 2023 defaults (confirm in the dialog).
- 5 Open the NSSF tab and enter Tier I and Tier II earnings limits and employee/employer rates plus the Effective Year, then click Save NSSF Settings.
- 6 Open the SHIF tab, set the SHIF Rate (%), Minimum Monthly Contribution and Effective Date, toggle Allowable Deduction, then click Save SHIF Settings.
- 7 Open the Housing Levy tab, set Employee and Employer rates, then Save Housing Levy Settings.
- 8 Open the Pension tab, set the Default Pension Rate, Max Allowable Deduction and Pension Fund Name, then Save Pension Settings.

## FIELDS ON THIS SCREEN

Payslip Number Prefix    Currency    Organization Name / Address    KRA PIN    NSSF Employer No    SHIF Employer No  
 Auto-Approve Payroll (toggle)    PAYE: Minimum Band, Maximum Band, Tax Rate (%)  
 NSSF: Effective Year, Tier I/II Earnings Limit, Employee Rate, Employer Rate  
 SHIF: Rate (%), Minimum Monthly Contribution, Effective Date, Allowable Deduction  
 Housing Levy: Employee Rate, Employer Rate    Pension: Default Rate, Max Allowable Deduction, Fund Name

**Tip** — Each rate tab shows a Calculation Preview panel so you can sanity-check the deduction on a sample KES 50,000 salary before saving.

**Tip** — NSSF, SHIF and Pension are allowable deductions (they reduce taxable pay before PAYE); the Housing Levy is not.

**Take care** — Reset to Default on the PAYE tab replaces ALL current tax brackets with the Kenya defaults and removes any custom brackets. This cannot be undone.

## 12.3 Allowances

Manage staff salary allowances (e.g. House, Transport). Each allowance has an amount, a taxable flag, and applies either to all staff or to one specific employee. Listed with search, type and applies-to filters, sorting, pagination and CSV export.

- 1 Navigate to Payroll > Allowances.
- 2 Use the search box, the Type filter (Recurring / Non-Recurring) and the Applies To filter (All Staff / Specific Employee) to narrow the list; click Clear to reset filters.
- 3 Click Add Allowance (top-right of the toolbar) to open the form drawer.
- 4 Enter the Allowance Name, choose the Allowance Type, and enter the Amount (KES).



- 5 Toggle Is Taxable on if the allowance should be included in taxable income (off exempts it from PAYE).
- 6 Set Applies To; if you pick Specific Employee, search by name or ID in the Employee box and select the staff member. Set the Status (Active/Inactive) and add optional Notes.
- 7 Click Save Allowance (or Save Changes when editing) to store it.
- 8 Use the pencil icon to edit or the trash icon to remove an allowance, and click Export CSV to download the current list.

## FIELDS ON THIS SCREEN

Allowance Name    Allowance Type (Recurring / Non-Recurring)    Amount (KES)    Is Taxable (toggle)  
 Applies To (All Staff / Specific Employee)    Employee (when Specific)    Status (Active / Inactive)    Notes

**Tip** — Only active allowances are picked up when you generate payslips.

**Tip** — Add/Edit/Delete buttons only appear if your role has the matching payroll.allowances permission.

**Take care** — Removing an allowance is permanent and cannot be undone; confirm in the Remove Allowance dialog.

## 12.4 Deductions

Manage staff salary deductions and loan repayments. Each deduction has an amount, a pre-tax flag, and applies to all staff or a specific employee. Choosing the Pension type automatically forces the deduction to be treated as pre-tax.

- 1 Navigate to Payroll > Deductions.
- 2 Filter the list with the search box and the Type filter (Recurring / Non-Recurring / Pension); click Clear to reset.
- 3 Click Add Deduction to open the form drawer.
- 4 Enter the Deduction Name, choose the Deduction Type, and enter the Amount (KES).
- 5 Toggle Is Pre-Tax on to apply the deduction before PAYE is calculated (choosing the Pension type forces this on automatically, capped at KES 30,000/month).
- 6 Set Applies To; for Specific Employee, search and select the staff member. Set the Status and add optional Notes.
- 7 Click Save Deduction (or Save Changes) to store it.
- 8 Use the pencil/trash icons to edit or remove a deduction, and Export CSV to download the current list.

## FIELDS ON THIS SCREEN

Deduction Name    Deduction Type (Recurring / Non-Recurring / Pension)    Amount (KES)    Is Pre-Tax (toggle)  
 Applies To (All Staff / Specific Employee)    Employee (when Specific)    Status (Active / Inactive)    Notes

**Tip** — Pre-tax deductions reduce taxable pay before PAYE; leave the toggle off for after-tax deductions such as loan repayments.

**Tip** — Pension-type deductions are automatically pre-tax and the toggle is locked on.

**Take care** — Removing a deduction is permanent and cannot be undone; confirm in the Remove Deduction dialog.

## ■ 12.5 Tax Reliefs

Manage PAYE tax reliefs which reduce the tax payable (not taxable income) — e.g. Personal Relief (KES 2,400/month) and Insurance Relief. Default reliefs are locked (their name and type cannot be changed and they cannot be deleted).

- 1 Navigate to Payroll > Reliefs.
- 2 Read the blue info banner summarising standard Kenya reliefs, then search the list with the Search box (Clear resets it).
- 3 Click Add Relief to open the form drawer.
- 4 Enter the Relief Name, the Amount (KES/month), choose the Relief Type (Personal / Insurance / Disability / Other), and optionally a Max Limit.
- 5 Set Applies To; for Specific Employee, search and select the staff member, then add optional notes.
- 6 Click Save Relief (or Save Changes) to store it.
- 7 Use the pencil icon to edit a relief; note that default reliefs (marked with a lock icon and a Default badge) can be edited only partially and cannot be deleted.
- 8 Click the trash icon on a custom relief to remove it (confirm in the dialog).

### FIELDS ON THIS SCREEN

Relief Name   Amount (KES/month)   Relief Type (Personal / Insurance / Disability / Other)   Max Limit (KES/month, optional)   Applies To (All Staff / Specific Employee)   Employee (when Specific)   Notes

**Tip** — Reliefs reduce the PAYE tax due, not the taxable income — this is different from a pre-tax deduction.

**Tip** — Personal Relief is usually the first relief to configure; it commonly ships as a locked default.

**Take care** — Removing a custom relief is permanent and cannot be undone. Default reliefs cannot be deleted.

## ■ 12.6 Generate Payslips

A four-step wizard that runs monthly payroll: pick the period, select staff, review a full per-employee preview (PAYE bracket breakdown, NSSF, SHIF, AHL, reliefs, net pay), then generate. You can save the run as a draft or commit it.

- 1 Navigate to Payroll > Generate (or click Generate Payslips from the dashboard).
- 2 Step 1 – Select Period: choose the Month and Year. If a run already exists for that period, an amber warning appears; note that proceeding creates a new run. Click Next.
- 3 Step 2 – Select Staff: choose All Active Staff, or pick Select Specific Employees and tick individual staff (use the search box and the Select All header). Click Next.
- 4 Step 3 – Review & Preview: wait for the preview to compute, then read the Total Gross, Total Deductions and Total Net summary cards.
- 5 Expand any employee row in the accordion to inspect the full breakdown: earnings and allowances, allowable deductions (NSSF, AHL, pension), the PAYE bracket-by-bracket calculation less reliefs, SHIF and other deductions, and net pay.
- 6 Click Save as Draft to store the run without approving it, or click Generate to run and commit payroll for the period.
- 7 Watch the progress bar while payroll generates.
- 8 Step 4 – Confirm: review the success summary (period, employees, total gross/PAYE/net, status), then click View Payslips or Back to Dashboard.

### FIELDS ON THIS SCREEN

Month

Year

Selection mode (All Active Staff / Select Specific Employees)

Individual staff checkboxes (specific mode)

**Tip** — The preview does not save anything — figures only persist once you click Save as Draft or Generate.

**Tip** — Make sure allowances, deductions, reliefs and statutory rates are correct first; the engine reads them at generation time.

**Take care** — Generating a run writes payslips for the whole period. If a run already exists for that month, proceeding creates an additional run rather than replacing the existing one — check the amber warning before continuing.

## ■ 12.7 Payslips

Browse every generated payslip with search, month/year/status filters, sorting and pagination. Click any row to open the payslip drawer where you can print it or download a PDF. Bulk CSV export is available.

- 1 Navigate to Payroll > Payslips.
- 2 Filter the list using the employee Search box and the All Months, All Years and All Status dropdowns (statuses: Draft, Approved, Rejected, Void); click Clear to reset.
- 3 Sort columns such as Payslip #, Employee, Gross or Net Pay by clicking the column header.

- 4 Click a payslip row (or its eye icon) to open the payslip detail drawer.
- 5 In the drawer, review the full payslip: employee details, earnings, statutory and other deductions, net pay, year-to-date summary and employer contributions.
- 6 Click Print to open a print-ready copy, or Download PDF to save the payslip, then click Close.
- 7 Click CSV in the toolbar to export the payslips list.
- 8 Click Generate New to start a fresh payroll run (visible if your role can create payslips).

## FIELDS ON THIS SCREEN

Search (employee)

Month filter

Year filter

Status filter (Draft / Approved / Rejected / Void)

**Tip** — The Print action opens a formatted browser print window; use Download PDF for a saved file copy.

**Tip** — Individual payslips can also be deleted from the Reports > Master Payroll view.

## 12.8 Reports

Statutory and management payroll reports across six tabs: Master Payroll, PAYE (P9), NSSF, SHIF, Housing Levy and Bank Schedule. Each report is filtered by period and exports to CSV; the Master Payroll tab also lets you view, download PDF, and delete individual payslips.

- 1 Navigate to Payroll > Reports.
- 2 Choose a report tab: Master Payroll, PAYE (P9), NSSF, SHIF, Housing Levy or Bank Schedule.
- 3 Set the Month and Year in the period filter bar (the PAYE tab uses a Year selector only, since P9 figures are cumulative year-to-date).
- 4 Read the table and the summary boxes below it (totals and employee counts); an empty state appears when no payroll was processed for that period.
- 5 Click CSV Export (or CSV Summary on the PAYE tab) to download the current report.
- 6 On the Master Payroll tab, click an employee name to open their payslip, or use the row menu to View Payslip, Download PDF, or Delete the payslip.
- 7 On the Master Payroll tab, tick payslip checkboxes and use Delete Selected in the blue bulk bar to remove several payslips at once.
- 8 On the PAYE tab, use a row's actions menu to download that employee's full 12-month P9A card as PDF or CSV; on the Bank Schedule tab, heed the amber banner flagging staff missing bank details.

## FIELDS ON THIS SCREEN

Report tab (Master / PAYE / NSSF / SHIF / AHL / Bank Schedule)

Month

Year

**Tip** — The Bank Schedule warns when employees have no bank details — update their staff records so they can be paid.

**Tip** — PAYE (P9) figures are cumulative year-to-date; download a per-employee P9A card from the row actions menu.

**Take care** — Deleting a payslip (single or bulk) from Master Payroll permanently removes it and all its line items and recalculates year-to-date totals. This cannot be undone.

# Module 13

## Inventory

Manage school procurement and stock end to end: suppliers, purchase orders, goods received notes (GRN), supplier invoices and payments, and stock levels across warehouses and departments. Document numbering prefixes are configured in Settings.

### ■ 13.1 Inventory Dashboard

The Inventory overview: key metric cards, quick-action buttons, low-stock alerts, recent purchase orders and activity, plus inline management of Warehouses and Departments.

- 1 Navigate to Inventory (Dashboard).
- 2 Read the six metric cards (Active Suppliers, Open POs, Pending Invoices, Low Stock Items, Stock Value, Total Items) — each is clickable and jumps to the matching page.
- 3 Use the Quick Actions card to Create Purchase Order, Receive Goods (GRN), Record Invoice, or Add Stock Item.
- 4 Review the Low Stock Alerts panel for items needing restock and the Recent Purchase Orders and Recent Activity feeds.
- 5 In the Warehouses card, click Add to create a storage location: enter Name, Location, Description and Manager, then Save; use the pencil/trash icons to edit or delete.
- 6 In the Departments card, click Add to create a department: enter Name, pick a Head of Department, add a Description, then Save; use the pencil/trash icons to manage.
- 7 When editing a warehouse or department, use the Active toggle to activate or deactivate it.

#### FIELDS ON THIS SCREEN

Warehouse: Name, Location, Description, Manager, Active

Department: Name, Head of Department, Description, Active

**Tip** — Warehouses and Departments defined here populate the dropdowns used when adding stock items.

**Tip** — The stat cards double as navigation shortcuts to their respective pages.

**Take care** — Deleting a warehouse or department is permanent and cannot be undone; confirm in the delete dialog.

### ■ 13.2 Settings (Numbering, Stores & Departments)

One tabbed page holding the three things the rest of Inventory depends on: document auto-numbering, the stores (warehouses) that hold stock, and the departments that draw it. The open tab is kept in the address bar, so a link to

a particular tab can be shared.

- 1 Navigate to Inventory > Settings. The page opens on the numbering tab; the address shows which tab you are on (for example /inventory/settings?tab=stores).
- 2 On the numbering tab, set the PO Prefix and Next PO Number; the preview shows the next Purchase Order (e.g. PO-00001). Do the same for the GRN Prefix and Next GRN Number, and set the Invoice Prefix used to label recorded invoices.
- 3 Review the preview line under each card to confirm the formatting, then click Save Settings (top right).
- 4 Switch to the Warehouses (stores) tab to see every store — Name, Type, Location, Items, Status, Actions. Click "Add store" to open one, or the edit icon to rename or relocate it.
- 5 Give each store a type so the rest of the system can tell a general store from a kitchen one. Nothing in Kitchen Manager works until at least one store exists — raising an S11 without one is refused with "Set up at least one store under Inventory before raising a requisition."
- 6 Switch to the Departments tab — Name, Description, Items, Status, Actions — and click "Add department" for each unit that draws stock or holds a vote (Kitchen, Boarding, Maintenance).
- 7 Deactivate a store or department you no longer use rather than deleting it, so the movements already recorded against it keep their meaning.

#### FIELDS ON THIS SCREEN

PO Prefix

Next PO Number

GRN Prefix

Next GRN Number

Invoice Prefix

Store name, type, location

Department name, description

**Tip** — Numbers are zero-padded to five digits in the generated references (e.g. PO-00042).

**Tip** — Set the Next number carefully so new documents continue from your existing sequence.

**Tip** — Warehouses and Departments used to sit on the Inventory dashboard; they moved here so the dashboard shows stock rather than configuration.

## 13.3 Suppliers

Maintain your supplier/vendor directory with company and contact details. Stat cards summarise totals; the list has All/Active/Inactive tabs, search, sorting, pagination and CSV/PDF export. A tabbed view drawer shows a supplier's items supplied and invoices.

- 1 Navigate to Inventory > Suppliers.
- 2 Review the Total, Active, Inactive and Registered This Month stat cards, then switch the All / Active / Inactive tabs or search to filter.
- 3 Click Add Supplier to open the form drawer.
- 4 Fill in Company Details (Company Name is required, plus KRA PIN, Phone, Email, Address) and the Contact Person section (name, phone, email), add optional Notes, then click Create Supplier.

- 5 Click a company name (or the eye icon) to open the view drawer, then switch between the Details, Items Supplied and Invoices tabs; the Invoices tab flags unpaid invoices.
- 6 Use the pencil icon (or Edit Supplier in the view drawer) to change details; when editing you can also toggle Active Status.
- 7 Click CSV or PDF to export the supplier list.
- 8 Click the trash icon to delete a supplier (confirm in the dialog).

## FIELDS ON THIS SCREEN

Company Name (required) KRA PIN Phone Email Address Contact Name / Contact Phone / Contact Email

Notes Active Status (edit only)

**Tip** — Inactive suppliers are hidden from selection lists (e.g. when creating a purchase order).

**Tip** — The view drawer's Invoices tab surfaces how much you still owe a supplier.

**Take care** — Deleting a supplier that has purchase orders deactivates it instead of removing it, to preserve history; suppliers with no POs are deleted outright.

## ■ 13.4 Purchase Orders

Create and manage purchase orders with line items. Status tabs (Open, Draft, Approved, Sent, Partial, Received, Cancelled), search, sorting, CSV/PDF export, per-row and bulk actions (approve, cancel, delete), and a hand-off to Receive Goods.

- 1 Navigate to Inventory > Purchase Orders.
- 2 Check the Total POs, Draft, Approved/Sent and Received stat cards, then filter using the status tabs and the search box.
- 3 Click New Purchase Order to open the create drawer.
- 4 In Order Details, select the Supplier, set the PO Date and optional Expected Delivery Date and Authorized By, and add Notes.
- 5 Under Line Items, fill each row's Item Name, Description, Qty, Unit and Unit Price (Add Item adds rows; the trash icon removes them); the Grand Total updates automatically.
- 6 Save the purchase order to create it.
- 7 Click a PO number (or the eye icon) to view it; from a Draft PO use the pencil to edit or the trash to delete.
- 8 Approve or cancel a PO from its view drawer, use Receive Goods to jump to the GRN screen pre-filled with that PO, and tick checkboxes to Approve, Cancel or Delete several POs at once.



## FIELDS ON THIS SCREEN

Supplier (required)

PO Date (required)

Expected Delivery Date

Authorized By

Notes

Line items: Item Name, Description, Qty, Unit, Unit Price

**Tip** — Only Draft purchase orders can be edited or deleted from the row actions; approved/sent POs are locked.

**Tip** — Use Receive Goods from an approved PO to auto-fill a GRN with the ordered items.

**Take care** — Approving, cancelling and deleting a purchase order each cannot be undone. Bulk-deleting POs also deletes any linked GRNs and invoices — the confirmation dialog lists the related records first.

## ■ 13.5 Invoices & Payments

Record supplier invoices with line items and tax, attach documents, and run the approval/payment workflow. Status tabs (All, Pending, Approved, Paid, Rejected), search, CSV export, and approve/reject/pay plus bulk actions.

- 1 Navigate to Inventory > Invoices.
- 2 Review the Total, Pending, Approved and Paid stat cards, then filter with the status tabs and the search box.
- 3 Click Record Invoice to open the create drawer.
- 4 Enter the Supplier Invoice Reference, pick the Supplier and optionally a Purchase Order (which auto-fills the supplier), and set the Received Date.
- 5 Add line items with Item Ref, Description, Qty, Price and Tax % (tax amount and totals compute automatically), and optionally drag or browse to attach documents (PDF/image/Office files, up to 10 files of 10 MB each).
- 6 Save to record the invoice, then click an invoice reference (or View) to open its detail drawer.
- 7 For an Open/Pending invoice click Edit to change it; use Approve or Reject (approval requires an admin/accountant role), then record payment with Payment Date, Method and Reference.
- 8 Tick checkboxes to Approve, Mark Paid or Delete invoices in bulk, and click Export CSV to download the list.

## FIELDS ON THIS SCREEN

Supplier Invoice Reference (required)

Supplier (required)

Purchase Order (optional)

Received Date (required)

Notes

Line items: Item Ref, Description, Qty, Price, Tax %

Documents (attachments)

Payment: Date, Method, Reference

**Tip** — Selecting a purchase order (or arriving from a confirmed GRN) auto-fills the supplier and line items.

**Tip** — Approve and Reject buttons appear only for Super Admin, School Admin or Accountant roles.

**Tip** — Attachments are capped at 10 documents per invoice, 10 MB each; accepted types include PDF, JPG, PNG and Office files.

**Take care** — Deleting an invoice is permanent; bulk delete cascades to related records (the confirmation dialog lists linked GRNs and item counts first).

## ■ 13.6 Receive Items (GRN)

Record goods received notes for incoming deliveries, optionally against an approved purchase order. GRNs are saved as Draft first; confirming a GRN updates stock levels and cannot be reversed.

- 1 Navigate to Inventory > Receive (or arrive pre-filled from a purchase order's Receive Goods action).
- 2 Review the Total GRNs, Draft and Confirmed stat cards, then filter with the search box and the All / Draft / Confirmed tabs.
- 3 Click Receive Goods to open the create drawer.
- 4 Optionally select a Purchase Order (this auto-fills the supplier and the expected quantities), choose a Warehouse, set the Received Date and Received By.
- 5 For each line item enter/confirm the Item Name, Expected and Received quantities, Unit, Unit Cost, Condition (Good/Damaged) and any Notes (Add Row adds lines).
- 6 Click Save as Draft to store without touching stock, or Save & Confirm to save and immediately update stock levels.
- 7 Click a GRN number (or the eye icon) to view its details; a Draft GRN can be confirmed from the view drawer or the row's confirm icon.
- 8 From a Confirmed GRN's view drawer, click Receive Invoice to record the supplier invoice, and use bulk selection to Confirm or Delete several GRNs at once.

### FIELDS ON THIS SCREEN

Purchase Order (optional)

Warehouse

Received Date (required)

Received By (required)

Line items: Item Name, Expected Qty, Received Qty, Unit, Unit Cost, Condition (Good/Damaged), Notes

Notes

**Tip** — Selecting a PO pre-loads its outstanding items and locks the Expected quantity to the ordered amount.

**Tip** — Received By defaults to the logged-in user but can be changed.

**Take care** — Confirming a GRN updates stock levels and cannot be reversed. Bulk-deleting GRNs also deletes any linked invoices — the confirmation dialog lists them first.

## ■ 13.7 Stock / My Inventory

Track inventory items, their stock levels, unit costs and value across warehouses and departments. Stat cards summarise totals; the list has search, warehouse/department/stock-level filters, sorting, pagination and CSV/PDF export.

- 1 Navigate to Inventory > Stock.
- 2 Review the Total Items, Total Value, Low Stock Alerts and Out of Stock stat cards.
- 3 Filter the list with the search box and the Warehouse, Department and Stock Level (All / Low Stock / Out of Stock) dropdowns.
- 4 Click Add Item to open the form drawer.
- 5 Enter the Name (required) plus SKU, Category, Description, Unit, Current Stock, Reorder Level and Unit Cost, and assign a Warehouse and Department.
- 6 Click Save to create the item; the status badge (In Stock / Low Stock / Out of Stock) is derived from stock versus reorder level.
- 7 Use the pencil icon to edit an item (editing also exposes an Active toggle) or the trash icon to delete it.
- 8 Click CSV or PDF to export the current stock list.

### FIELDS ON THIS SCREEN

Name (required)   SKU   Category   Description   Unit   Current Stock   Reorder Level   Unit Cost (KES)  
 Warehouse   Department   Active (edit only)

**Tip** — An item shows Low Stock when current stock falls to or below its reorder level, and Out of Stock at zero.

**Tip** — Stock levels normally rise automatically when you confirm a GRN; adjust the Current Stock field here only for manual corrections.

**Take care** — Editing an item's Current Stock is a manual override and directly changes recorded inventory. Deleting an item is permanent and cannot be undone.

## ■ 13.8 Issued to Kitchen

The store's own view of everything it has handed over to the kitchen on a Counter Requisition. The same movements Kitchen Manager shows, read from the other side of the counter.

- 1 Navigate to Inventory > Issued to Kitchen. The three cards at the top total the Vouchers, Lines issued and Value handed over for whatever is currently filtered.
- 2 Read the table — Date, S11 No., Item, Quantity, Value, From store, Issued by.
- 3 Click any S11 number to jump straight to that Counter Requisition in Kitchen Manager and see the full voucher.

- 4 Filter with the From and To dates for a term or a month, and use the search box ("Item, S11 number or store...") to trace one item or one voucher.
- 5 Click "CSV" to export what is on screen, or "Counter Requisitions" to open the kitchen register itself.

## FIELDS ON THIS SCREEN

From / To

Search

**Tip** — Goods on this page have left the store but not the school — they sit in the kitchen until they are cooked, which is why they no longer appear in store stock but are not an expense yet.

**Tip** — This is the quickest way to answer "how much food went to the kitchen last term?" without opening Kitchen Manager at all.

# Module 14

## Kitchen Manager

Everything between the store and the plate: what the kitchen asked for, what the storekeeper actually handed over, what the menu said it should have taken, and what the difference cost. It runs on Kenyan school stores practice — a Counter Requisition and Issue Voucher (Form S11) for every issue, a bin card per item, and a vote book that commits money at approval rather than at payment. Stock only ever moves through the ledger, so the register, the bin card and the food cost report can never disagree with each other.

### 14.1 Kitchen Dashboard

The one screen a bursar or catering supervisor opens first: what the store holds, what the kitchen is waiting on, and how the week is running against plan.

- 1 Navigate to Kitchen Manager > Dashboard. The page opens across every store; use the "Store" dropdown (top right, defaults to "All stores") to narrow to a single store such as the Dry Store or the Cold Room.
- 2 Read the headline cards for stock value on hand, requisitions waiting for approval, and the current period's food cost position.
- 3 Work the "Below reorder level" table — Item, Store, On hand, Reorder at, Value. Anything listed has fallen to or under the reorder level set on the item, and is what your next Purchase Requisition should cover.
- 4 Scan the variance table — Item, Theoretical, Actual, Variance, Value, Band — to see where the kitchen drew more (or less) than the menu called for. Band is the traffic light: Healthy, Watch, Flagged.
- 5 Check "Recent requisitions" — No., Date, From → To, Lines, Value, Status — to see what is in flight. Click through to the S11 itself for the detail.
- 6 Click "Refresh" to re-read the figures after someone else has issued or received stock; you will see the toast "Kitchen figures refreshed."
- 7 Click "CSV" to export the low-stock list. If nothing is below its reorder level the export is refused with "There is nothing below its reorder level to export." — that is good news, not an error.

#### FIELDS ON THIS SCREEN

Store

**Tip** — Stock value is weighted average cost, not the last price paid, so it does not jump every time a supplier changes their price.

**Tip** — If the dashboard is empty on a new setup, you have not created a store yet — do that under Inventory > Settings > Warehouses first.

## ■ 14.2 Counter Requisition (S11)

The Counter Requisition and Issue Voucher — Form S11. The kitchen asks for food, someone with authority approves it, and the storekeeper records what actually crossed the counter. Two quantity columns (required and issued) because they are very often not the same number.

- 1 Navigate to Kitchen Manager > Counter Requisition. The register lists every S11 — S11 No., Date, From → To, Purpose, Lines, Required, Issued, Value, Status, Actions. Click the S11 number (or the eye icon) to open the full voucher.
- 2 Click "Raise an S11". Choose the "From store" (where the goods leave) and the "Point of use" (where they go, e.g. Main Kitchen). Both are required — without them you will see "Choose the store the goods leave and the point of use they go to."
- 3 Write the Purpose so it reads like a record, not a label — for example "Monday lunch for 420 boarders" or "staff kitchen". This is what an auditor reads first.
- 4 Click "Add an item" for each line. Search the store, pick the item, and enter the Qty required. The line shows On hand as you go, plus Remarks and an Est. value. Save with at least one line or you will be stopped with "Add at least one item before saving this requisition."
- 5 Save as a draft while you are still building it. Only a draft can be edited — attempting to change anything later gives "Only a draft requisition can be edited."
- 6 Click "Submit for approval" when the list is right. The status moves Draft → Submitted and the voucher is now read-only to the requester.
- 7 As the approver, open the S11 and click "Approve", or "Reject" with a reason — rejecting without one is refused ("Say why it is being rejected — the kitchen has to know what to change."). The reason goes back to the kitchen.
- 8 As the storekeeper, click "Issue" on an approved S11. The issue dialog shows Qty required, Qty issued, Outstanding, On hand and Value per line. Type what you actually handed over — not what was asked for — and click "Issue these quantities". Nothing is issued until this step, and you cannot issue against an unapproved voucher ("A requisition has to be approved before anything can be issued against it.").
- 9 Use the print button on any S11 to produce the server-side PDF voucher, laid out with both quantity columns and the four signature blocks (requested by, approved by, issued by, received by) for the file copy.
- 10 Filter the register with the search box ("S11 number, purpose or requester..."), the store and status filters, and the date range; click "Export CSV" for what is on screen.

### FIELDS ON THIS SCREEN

From store

Point of use

Purpose

Item

Qty required

Remarks

Qty issued (at issue time)

Reason (on reject)

**Tip** — Issuing is the only thing that moves stock. Raising and approving an S11 change nothing in the store — which is exactly why the voucher can be approved a day before the food is drawn.

**Tip** — Issuing less than was asked for is normal and is recorded as Outstanding rather than silently closing the line.

**Tip** — Every issue writes a matching pair of movements — out of the store, in to the kitchen — so the same event is visible from Inventory as well (see Inventory > Issued to Kitchen).

**Take care** — A rejected or cancelled S11 stays on the register rather than disappearing. That is deliberate: the fact that something was asked for and refused is part of the record.

## ■ 14.3 Stores Ledger

Every quantity change the school has recorded, in the order it happened, across three views: the raw movements, a per-item summary, and the classic bin card.

- 1 Navigate to Kitchen Manager > Stores Ledger. It opens on the "Movements" tab — Date, Item, Store, Type, In, Out, Unit cost, Value, Balance after, Document, By.
- 2 Narrow the view with the filters: Store, Type (receipt, issue, transfer, waste, adjustment), Direction (in or out), Document, Items, and the From / To dates. The "Items" filter also offers Food only, Non-food only, or Both.
- 3 Use the search box ("Item, document number, note or user...") to trace one delivery note, one S11 number, or everything one member of staff recorded.
- 4 Switch to "Ledger summary" for the period picture per item — Opening, Receipts, Issues, Transfer in, Transfer out, Waste, Adjustment, Closing. This is the view that reconciles to a stock take.
- 5 Switch to "Bin card" and choose an item to get the single-item running balance a storekeeper would keep on a card at the shelf.
- 6 Click "CSV" on any tab to export exactly what is filtered. Each tab exports its own shape and tells you if there is nothing to export.

### FIELDS ON THIS SCREEN

Store

Type

Direction

Document

Items (Food only / Non-food only / Both)

From / To

Search

**Tip** — Balance after is computed as the ledger is written, so scrolling the movements list shows you the running stock level at every point in time.

**Tip** — Unit cost on an issue is the weighted average at the moment of issue, which is why two issues of the same item days apart can carry different costs.

**Take care** — The ledger is append-only. A correction is entered as a new movement (an adjustment), never as an edit of the original — so a mistake and its fix are both visible, which is what makes the ledger trustworthy.

## ■ 14.4 Stock Take

Count a store, compare it with the book, and post the difference to the ledger so the register matches the shelf.

- 1 Navigate to Kitchen Manager > Stock Take. The list shows past counts with their store, date, counter and status (Draft or Approved); filter by store or status, or search ("Search store or counter...").
- 2 Start a new count. Choose the "Store" being counted and the "Date counted" — both are required ("Choose the store being counted.", "Give the count a date."). Put a name in "Counted by", or leave it blank to use your own.
- 3 Click "Open count sheet". Every item held in that store is listed with its book quantity and an empty column for the counted quantity.
- 4 Walk the store and type what you actually find. Use "Find an item on this sheet..." to jump to an item rather than scrolling.
- 5 Tick "Only lines off the book" to hide everything that already agrees, so you can concentrate on the discrepancies.
- 6 Click "Save counts" as you go — the sheet stays a draft, so a long count can be done over more than one sitting.
- 7 Approve the count when you are satisfied. Approval writes one adjustment movement per differing line into the Stores Ledger, and the register now matches your count.
- 8 Use "Export sheet" for a printable count sheet to carry into the store, and "Export CSV" on the list for the history of counts.

### FIELDS ON THIS SCREEN

Store   Date counted   Counted by   Counted quantity (per line)

**Tip** — Export the blank sheet first and count on paper if the store has no signal — then type the numbers in afterwards.

**Tip** — A count that finds no differences still posts nothing and is worth approving anyway: it is evidence the store was checked on that date.

**Take care** — Approving is what posts the adjustments, and adjustments cannot be un-posted — they can only be corrected by a further count or adjustment. Check the sheet before you approve.

## ■ 14.5 Recipes

What the kitchen cooks, what it takes out of the store, and what one portion actually costs — including the part of a cabbage that never reaches the pot.

- 1 Navigate to Kitchen Manager > Recipes. The register lists every dish with its portion count and cost per portion.
- 2 Click "New recipe". Give it a name and set how many portions one batch makes, the portion size and unit (e.g. 400 g), and the batch yield.
- 3 Click "Add ingredient" for each line: pick the store item, the quantity for a full batch, and the unit.



- 4 Set the yield percentage on any ingredient that loses weight in preparation. Cabbage trimmed to 80% means the store must issue 1.25 times the recipe amount — the costing does that arithmetic for you rather than quietly under-costing the dish.
- 5 Save the recipe and read the cost per portion it reports. Change a price in the store and the figure moves with it, because it is computed from current weighted average cost, not typed in.
- 6 Open an existing recipe from the list to edit it, or use "Export CSV" for the whole recipe register.

## FIELDS ON THIS SCREEN

Recipe name

Portions per batch

Portion size and unit

Batch yield

Ingredient item

Quantity and unit

Yield %

**Tip** — A recipe can contain another recipe — a sauce used across several dishes is built once and referenced.

**Tip** — Cost per portion is what makes the Food Cost report meaningful; a menu built from uncosted recipes has nothing to compare actual usage against.

**Take care** — A recipe cannot contain itself at any depth — the system refuses the loop rather than hanging while it tries to cost it.

## 14.6 Menus & Meal Plans

Build a cycle menu, stamp it onto the calendar, and turn the plan into a requisition on the store. A cycle menu is the rota the kitchen repeats — day 1 to day 7, then round again.

- 1 Navigate to Kitchen Manager > Menus. Click "New menu", name it (for example "Term 2 Cycle") and set the cycle length in days.
- 2 For each day and meal, click "Add a dish" and choose a recipe. Day 1 Lunch, Day 2 Lunch and so on — leave a slot empty and nothing is planned for it.
- 3 Click "Stamp the cycle" and give a date range. The cycle is laid onto those dates, repeating as needed; choose whether to skip weekends.
- 4 Click "See the planned meals" to read what was stamped — Day, Meal, Dish, Headcount, From, Planned cost, Status.
- 5 Check the headcount panel: Boarders, Day scholars, Staff and Total. Numbers come from the roll rather than being typed — lunch counts day scholars, supper does not, because they have gone home.
- 6 Turn the plan into a draw on the store: the requirements are converted into a Counter Requisition, which then follows the normal S11 approval and issue route.
- 7 Use "CSV" to export the plan, and the edit and delete controls on each slot or plan to adjust it.

## FIELDS ON THIS SCREEN

Menu name

Cycle length (days)

Day number

Meal

Recipe

From / To dates

Skip weekends

**Tip** — Stamp two weeks at a time rather than the whole term — menus change, and re-stamping a short range is easier than unpicking a long one.

**Tip** — If a stamped day comes out with no meals, the cycle day it landed on is empty. Add the dish to that day of the cycle and stamp again.

## ■ 14.7 Food Cost

What the menu called for against what actually left the store, and what feeding one child for a day came to. This is the report that answers whether the kitchen is running to plan.

- 1 Navigate to Kitchen Manager > Food Cost and choose the period you want to look at.
- 2 Read the per-item table: Item, Theoretical (what the planned menus should have used), Actual (what the S11s actually issued), Variance, Variance %, Should have cost, Did cost, Difference, and Band.
- 3 Use the band tabs to filter: Healthy (within 2% of plan), Watch (2–5% out, worth asking about), and Flagged (over 5% out). Colour on this page carries that meaning and nothing else.
- 4 Click any column header to sort — sorting by Difference in value shows you the items that actually cost money, which is rarely the same list as the biggest percentage swings.
- 5 Read the cost-per-child-per-day figure. That is the number to quote to a board or a parent meeting.
- 6 Click "CSV" to export the analysis for the period.

### FIELDS ON THIS SCREEN




**Tip** — A large negative variance (issued far less than planned) is worth as much attention as an overspend — it usually means the menu was not actually cooked, or a meal was skipped.

**Tip** — If everything shows as a 100% overspend, no menus were stamped for the period, so there is no theoretical figure to compare against.

**Take care** — The theoretical side only exists where menus were planned and recipes were costed. Food Cost is a report on the discipline of the other pages, not a substitute for it.

## ■ 14.8 Vote Book

What each vote holds, what approving a requisition has already promised out of it, and what is genuinely left to spend. The commitment happens at approval, not at payment — which is the whole point of a vote book.

- 1 Navigate to Kitchen Manager > Vote Book. Each line shows Vote, Department, Period, Amount, Committed, Spent, Available and Status.
- 2 Click "New vote" to open one: name it, attach it to a department, set the period it covers and the amount voted.

- 3 Read the three money columns in order. Amount is what was voted. Committed is what approved purchase requisitions have promised. Spent is what orders have actually taken. Available is what is genuinely left.
- 4 Open a vote to see the purchase requisitions charged against it — PR, Date, Raised by, Estimate, Status — so you can see exactly what has eaten the balance.
- 5 Use "CSV" to export the vote book for a finance meeting.

## FIELDS ON THIS SCREEN

Vote name   Department   Period   Amount

**Tip** — Available is the number to trust when deciding whether the school can afford something, because it already accounts for approvals that have not yet turned into invoices.

**Tip** — A vote sitting at nearly zero Available but low Spent means a lot has been approved and not yet ordered — chase the orders, not the budget.

## ■ 14.9 Purchase Requisition

Asking for something the store does not carry. Approval commits the money on the vote; raising the order spends it. This is the route from a kitchen need to a local purchase order.

- 1 Navigate to Kitchen Manager > Purchase Requisition. The register shows PR, Date, Vote, Department, Raised by, Estimate, Status, Actions.
- 2 Click "Raise a requisition". Choose the vote it is charged to and the department, then add lines: Description, Store item (where it matches something already on the register), Qty, Unit, Est. unit cost and the Value it computes.
- 3 Save it as a draft, then submit it for approval when the list is right. Status runs Draft → Submitted → Approved → Ordered, with Rejected and Cancelled as the other endings.
- 4 As the approver, click "Approve and commit". This is the moment the money is reserved against the vote — the vote book's Committed column moves immediately, before any supplier has been paid.
- 5 Convert the approved requisition into a local purchase order. That moves the money from Committed to Spent and hands the rest of the process to Inventory > Purchase Orders.
- 6 Reject with a reason, or cancel, if the request should not proceed. Use "CSV" to export the register.

## FIELDS ON THIS SCREEN

Vote   Department   Description   Store item   Qty   Unit   Est. unit cost

**Tip** — Use a Purchase Requisition for what the store does not stock; use a Counter Requisition (S11) to draw what it already holds. Mixing the two is the most common mistake when a kitchen starts on the system.

**Tip** — The estimate does not have to be exact — it exists so the vote book can reserve a sensible amount before quotes come in.

**Take care** — Approving commits real budget. If a requisition is approved and then abandoned, cancel it so the commitment is released — otherwise the vote shows less Available than the school actually has.

# Module 15

## Transport

Manage the school transport system: routes and stop pricing, student route assignments, the vehicle fleet with fuel logs, and fuel reports.

### ■ 15.1 Routes

Create and manage transport routes and their drop-off stops with one-way and two-way pricing.

- 1 Navigate to Transport > Routes (/transport).
- 2 Review the Total Routes, Total Stops, Total Vehicles and Students on Transport stat cards.
- 3 Use the search box to find a route and adjust items-per-page.
- 4 Click Add Route, enter the Route Name and an optional Description, then add one or more stops with Stop Name and one-way/two-way prices.
- 5 Click Add Stop to add more drop-off points, then click Create Route.
- 6 Click a route name (or the eye icon) to view its full details including stops, vehicle and student count.
- 7 Use the pencil icon to edit a route or the trash icon to delete it (confirm in the dialog).
- 8 Click CSV to export the routes list.

#### FIELDS ON THIS SCREEN

Route Name

Description

Stop Name

One-Way KES

Two-Way KES

**Tip** — Each route needs at least one stop with a name; prices cannot be negative.

**Tip** — The routes list shows the vehicle and driver once a vehicle is assigned to the route.

**Take care** — Deleting a route also removes all stops associated with it and cannot be undone.

### ■ 15.2 Student Routes

Assign students to route stops and set their transport mode, or remove them from a route.

- 1 Navigate to Transport > Student Routes (/transport/assignments).
- 2 Select a route from the left-hand list to load its stops and assigned students on the right.
- 3 For a stop, click Assign Students to open the assignment drawer.

- 4 Choose the Transport Mode (1-Way or 2-Way), then search students by name or admission number.
- 5 Tick the students to assign (already-assigned students are shown disabled), then click Assign.
- 6 To remove a student, click Remove next to their name and confirm in the dialog.

## FIELDS ON THIS SCREEN

Transport Mode

Search Students

**Tip** — Type at least 2 characters in the search box to look up students.

**Tip** — Each stop shows its one-way and two-way price so you can pick the right transport mode.

**Take care** — Removing a student unassigns them from the transport route.

## 15.3 Vehicles

Manage the vehicle fleet and record per-vehicle fuel entries and consumption stats.

- 1 Navigate to Transport > Vehicles (/transport/vehicles).
- 2 Use the search box to find a vehicle and adjust items-per-page.
- 3 Click Add Vehicle, enter the Registration No (required) plus optional Type, Year of Manufacture, Capacity and Driver, then click Add Vehicle.
- 4 Click a vehicle row (or the eye icon) to open its detail drawer with fuel history and stats.
- 5 Click Add Fuel Entry (from the row's fuel icon or in the detail drawer), enter Date, Amount and Price per Liter (litres auto-calculate), plus optional odometer/station/notes, then click Add Entry.
- 6 Use the pencil icon to edit a vehicle and the trash icon to delete it (confirm in the dialog).
- 7 Click CSV to export the vehicle list.

## FIELDS ON THIS SCREEN

Vehicle Registration No

Vehicle Type

Year of Manufacture

Capacity

Select Driver

Date

Amount (KES)

Price per Liter (KES)

Odometer

Station

Notes

**Tip** — Only the registration number is required; the driver is picked from the staff list via a searchable dropdown.

**Tip** — Fuel volume in litres is calculated automatically from Amount divided by Price per Liter.

**Take care** — Deleting a vehicle that is assigned to a route unassigns it first, and the deletion cannot be undone.

**Take care** — Deleting a fuel entry cannot be undone.

## ■ 15.4 Reports

Analyze fleet fuel consumption and cost over a date range, per vehicle, and export the results.

- 1 Navigate to Transport > Reports (/transport/reports).
- 2 Set the From and To dates and optionally pick a single Vehicle, then click Apply.
- 3 Review the summary cards: Total Fuel (L), Total Cost (KES), Avg Cost/L and Vehicles Fueled.
- 4 Browse the fuel entries table, sorting columns by clicking their headers and paging as needed.
- 5 Click CSV or PDF to download the report for the selected range and vehicle.

FIELDS ON THIS SCREEN

From

To

Vehicle

**Tip** — The report defaults to the current month; adjust the date range and click Apply to refresh.

**Tip** — Leave the Vehicle filter on 'All Vehicles' to see the whole fleet.

# Module 16

## Communication

Reach parents and staff by SMS and email, and review a searchable log of everything that has been sent. (SMS gateway and sender settings live under System Settings > Integrations > Bulk SMS.)

### ■ 16.1 Send SMS

Compose and send bulk SMS to parents by class, teachers, transport routes, or a custom list of numbers.

- 1 Navigate to Communication > Send SMS (/communications).
- 2 Check the SMS Balance shown in the header; click the refresh icon to update it.
- 3 Choose an Audience: Parents by Class, Teachers, Transport Route, or Custom Numbers.
- 4 For Parents pick an optional Form and Stream; for Teachers pick a Category; for Route select a route; for Custom Numbers type the phone numbers separated by commas or spaces.
- 5 Type your message and watch the character count, SMS count and estimated recipient count update.
- 6 Click Send SMS, then review the recipient and credit estimate and click Send in the confirmation dialog.

#### FIELDS ON THIS SCREEN

Audience   Form   Stream   Category   Route   Phone Numbers   Message

**Tip** — 160 characters equals one SMS; longer messages are split and cost multiple credits each.

**Tip** — The school name is automatically appended to every message.

**Tip** — The estimated recipient count updates live as you change the audience and filters.

**Take care** — Sending SMS consumes credits from your school's SMS balance — roughly recipients x SMS-count credits per send.

**Take care** — Sending cannot be undone once confirmed.

### ■ 16.2 SMS History

View and export the log of all sent SMS messages, with a detail view for each message.

- 1 Navigate to Communication > SMS History (/communications/history).



- 2 Use the search box and the From / To date filters to narrow the log.
- 3 Sort the table by clicking column headers (Recipient, Message, SMS, Date & Time, Sender).
- 4 Click a row (or the eye icon) to open the SMS detail drawer with the full message and metadata.
- 5 Click CSV or PDF to export the filtered history.
- 6 Page through results using Previous / Next.

## FIELDS ON THIS SCREEN

Search

From

To

**Tip** — The header shows the current SMS balance for quick reference.

**Tip** — The SMS count column reflects how many message segments each send used.

## 16.3 Send Email

Compose and send emails to parents by class, teachers, or a custom list of addresses.

- 1 Navigate to Communication > Send Email (/communications/email).
- 2 Choose an Audience: Parents by Class, Teachers, or Custom Addresses.
- 3 For Parents pick an optional Form and Stream; for Teachers pick a Category; for Custom Addresses type the email addresses separated by commas.
- 4 Enter a Subject and compose the email body in the rich-text editor.
- 5 Check the estimated recipient count, then click Send Email.
- 6 Confirm the recipient count in the dialog and click Send.

## FIELDS ON THIS SCREEN

Audience

Form

Stream

Category

Email Addresses

Subject

Message

**Tip** — Both a Subject and a message body are required before the Send button enables.

**Tip** — The estimated recipient count updates live as you change the audience and filters.

**Take care** — Sending emails cannot be undone once confirmed.

## ■ 16.4 Email History

View and export the log of all sent emails, with a full detail view for each message.

- 1 Navigate to Communication > Email History (/communications/email/history).
- 2 Use the search box and the From / To date filters to narrow the log.
- 3 Sort the table by clicking column headers (Recipient, Subject, Date & Time, Sender).
- 4 Click a row (or the eye icon) to open the email detail drawer with the rendered message body.
- 5 Click CSV or PDF to export the filtered history.
- 6 Page through results using Previous / Next.

FIELDS ON THIS SCREEN

Search

From

To

**Tip** — The header badge shows the total number of emails sent.

**Tip** — The Preview column strips HTML to a one-line summary of each email.

# Module 17

## My Profile

View and edit your own user profile. Update your name, email, phone, avatar photo, and change your password.

### ■ 17.1 Profile Settings

Manage your personal account details. Keep your contact information up to date and secure your account with a strong password.

- 1 Click on your name/avatar at the bottom of the sidebar, or navigate to My Profile.
- 2 View your current profile information: name, email, phone, and avatar.
- 3 To update your name, email, or phone, edit the fields and click Save Profile.
- 4 To change your avatar, click the avatar image and upload a new photo.
- 5 To change your password, enter your current password, then enter and confirm your new password.
- 6 Click Change Password to apply.

#### FIELDS ON THIS SCREEN

Full Name

Email

Phone

Avatar

Current Password

New Password

Confirm Password

**Tip** — Use a strong password with a mix of uppercase, lowercase, numbers, and special characters.

**Tip** — Your profile email is used for system notifications and password recovery.

**Tip** — The avatar appears in the sidebar and is visible to other system users.

**Take care** — If you forget your password, contact your school administrator to reset it from User Management.