Fiap Systems

SCHOOL / EDUTECH

How to use School / EduTech

A practical, module-by-module guide for your team.

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Contents

01 Platform Overview

Learn what Fiap Systems is and how to navigate the platform.

What is Fiap Systems?

Fiap Systems is a production-grade, multi-tenant SaaS platform for managing businesses across eight industries: Retail, School, Hospital, Restaurant, Bakery, Hotel, Car Rental, and Event Rental. Each business type gets a specialized template with industry-specific modules, while sharing core features like team management, payroll, analytics, and multi-branch support.

- 8 business templates with specialized modules
- Multi-tenant architecture — each business is fully isolated
- Role-based access control (RBAC) with 13 role types
- Bilingual support (English & French)
- Mobile app portals for students, parents, and patients
- Dark mode and light mode with premium UI

Choosing Your Template

When your business account is created, a template is applied that determines which modules appear in your sidebar. Here are the available templates:

Template	Best For	Key Modules
Retail Store	Shops, supermarkets, general retail	POS, Inventory, Customers, Sales
Edutech System	Schools, training centers, academies	Students, Teachers, Fees, Attendance, Results, Promotions
Meditech System	Hospitals, clinics, medical centers	Patients, Doctors, Appointments, Lab Tests, Pharmacy
Restaurant	Restaurants, snack bars, cafes	Tables, Menu, Orders, Kitchen Display (KDS)
Bakery	Bakeries, pastry shops	Ingredients, Recipes, Production, Waste Tracking
Hotel / Lodge	Hotels, lodges, rental properties	Properties, Rooms, Guests, Bookings, Housekeeping
Car Rental System	Car rental agencies, chauffeur services	Fleet, Vehicles, Bookings, Rates, Maintenance, Damages
Event Management System	Event planners, rental agencies	Equipment, Packages, Quotes, Deliveries, Bookings

Navigating the Dashboard

Once logged in, you'll see your main dashboard. Here's how the interface is organized:

1. **Sidebar Navigation**
   The left sidebar contains links to all your modules. It's organized into sections relevant to your template. On mobile, tap the hamburger menu (☰) to open it.
2. **Top Bar**
   The top bar shows your business name, notification bell, theme toggle (light/dark), language switcher, and your profile menu.
3. **Dashboard Overview**
   The main dashboard displays key metrics — revenue, sales, stock alerts, and template-specific stats like today's appointments (hospital) or attendance rate (school).
4. **Quick Actions**
   Most dashboards have quick-action buttons for common tasks like 'New Sale', 'Add Product', or 'Add Customer'.

Tip: Use keyboard shortcut Escape to close any modal or sidebar overlay.

02 First-Time Setup

Configure your business profile, branding, and essential settings.

Logging In

1. **Open the Login Page**
   Navigate to your Fiap Systems URL. You'll see the login screen with the tagline 'Control Your Business From Anywhere'.
2. **Enter Credentials**
   Use the email and password provided by your administrator. For POS terminals, use the Quick PIN login with your Business ID and PIN code.
3. **Select Login Method**
   Toggle between 'Email & Password' (for managers/admins) and 'Quick PIN' (for cashiers/staff) using the switch at the top.

Tip: Quick PIN login is ideal for shift changes at POS terminals — it's faster than typing full credentials.

Business Profile Setup

After first login, navigate to Settings from the sidebar to configure your business:

1. **Business Name**
   Go to Settings → General. Enter your official business name. This appears on receipts, invoices, and reports.
2. **Currency**
   Select your operating currency from the dropdown. This affects all financial displays across the platform.
3. **Timezone & Date Format**
   Set your local timezone and preferred date format (DD/MM/YYYY or MM/DD/YYYY).
4. **Logo & Branding**
   Upload your business logo and set brand colors. These are used in receipts, reports, and the dashboard header.
5. **Language**
   Choose English or French. The entire interface, including labels, buttons, and notifications, will switch to your selected language.

Theme Preferences

Fiap Systems supports both light and dark modes:

1. **Toggle Theme**
   Click the sun/moon icon in the top bar to switch between light and dark mode. Your preference is saved automatically.

Note: Theme preference is stored per-browser. Each user can have their own preferred theme.

03 Roles & Permissions

Understand the role hierarchy and what each role can access.

Role Hierarchy

Fiap Systems uses Role-Based Access Control (RBAC). Each user is assigned one role that determines what they can see and do. Roles are additive — higher roles always have more permissions.

Role	Access Level	Best For
Super Admin	Full platform control across all tenants	Platform operators
Owner	Full tenant access, user management	Business owners
Admin	Almost everything, no tenant management	Senior managers
Manager	Day-to-day operations, no user management	Branch/shift managers
Staff	Limited operational — view + create, no delete	General staff
Cashier	POS-only — sales and customer viewing	POS terminal operators
Teacher	Academic access — attendance, grading, results	School teachers
Doctor	Clinical access — patients, appointments, records	Physicians
Nurse	Clinical support — vitals, lab, pharmacy	Nursing staff
Baker	Production — ingredients, recipes, batches, waste	Bakery production staff
Student	Read-only — own records, fees, attendance	Students (portal)
Parent	Read-only — child's data, can make fee payments	Parents (portal)
Patient	Read-only — own records, appointments, bills	Patients (portal)

Permission Format

Permissions follow the pattern module:action. For example: customers:create, inventory:view, sales:delete. Medical modules use a three-part format: medical:patients:create.

Warning: Only Owner and Admin roles can create, edit, or delete other users. Managers and below cannot manage team members.

Template-Specific Roles

Some roles are only relevant for specific templates:

- Teacher, Student, Parent — Edutech template only
- Doctor, Nurse, Patient — Meditech template only
- Baker — Bakery template only
- Cashier — Available in Retail, Restaurant, and Bakery

Tip: When adding a team member, only roles relevant to your current template are shown in the dropdown.

04 Team Management

Add, manage, and configure your team members with roles and payroll.

Adding Team Members

Navigate to Team from the sidebar to manage your staff. The team page shows all members with their roles, status, and branch assignments.

1. **Click 'Add Employee'**
   Click the 'Add Employee' button at the top right of the team page.
2. **Fill Basic Info**
   Enter the member's full name and email address. The email will be used for login credentials.
3. **Assign a Role**
   Select the appropriate role from the dropdown (Owner, Admin, Manager, Staff, Cashier, or template-specific roles like Teacher, Doctor, Baker).
4. **Set Password**
   Enter a temporary password. The member can change this after first login.
5. **Configure Salary (Optional)**
   Enter the base salary amount. This links directly to the payroll system.
6. **Set Quick PIN (Optional)**
   Assign a 4-6 digit PIN for fast POS terminal access. Ideal for Cashier and Staff roles.
7. **Assign Branch**
   If you have multiple branches, select which branch this member belongs to.

Tip: For POS staff, always set up both email/password AND a Quick PIN. The PIN allows fast shift changes without full credential entry.

Managing Existing Members

1. **View Team Directory**
   The team page shows all members in a searchable, filterable table. Use the search bar to find by name or email.
2. **Filter by Role or Branch**
   Use the dropdown filters to show only specific roles (e.g., all Managers) or members at a specific branch.
3. **Edit a Member**
   Click the edit icon on any row to update their details — name, email, role, salary, or branch assignment.
4. **Reset Password**
   Click the three-dot menu → Reset Password to set a new temporary password for a member.
5. **Deactivate a Member**
   Click the three-dot menu → Deactivate to prevent a member from logging in without deleting their record.

Warning: You cannot deactivate your own account or accounts with a role equal to or higher than yours.

Payroll Configuration

Each team member's salary is configured from their profile and feeds directly into the payroll system:

- Base Salary — The gross monthly salary amount
- Tax Percentage — Withholding tax rate applied to gross
- Employer Contribution — Additional employer social contributions
- Bank Details — Bank name and account number for payslips
- Allowances — Additional allowances added on top of base salary

Note: Changes to salary configuration take effect on the next payroll run. Past payroll records remain unchanged.

05 Payroll

Run monthly payroll, generate payslips, and track payment history.

Payroll Overview

The payroll module lets you process monthly salaries for all team members with configured salary data. Navigate to the Payroll page from the sidebar.

- Monthly payroll processing with automatic calculations
- Tax withholding and employer contributions
- Individual payslip generation and printing
- Monthly payroll report with totals
- Automatic expense tracking (payroll expenses auto-logged)

Running Payroll

1. **Navigate to Payroll**
   Click 'Payroll' in the sidebar. You'll see the payroll dashboard with summary stats: employees with salary, estimated monthly gross, and latest run status.
2. **Select Month & Year**
   Use the month and year selectors to choose the pay period you want to process.
3. **Click 'Run Payroll'**
   Click the 'Run Payroll' button. The system calculates gross salary, tax deductions, employer contributions, and net pay for each employee.
4. **Review the Breakdown**
   A detailed table appears showing each employee's gross, tax, social contributions, total deductions, and net pay.
5. **Mark as Paid**
   Once payments are made, click 'Mark as Paid' to finalize the payroll run. This action cannot be undone.

Warning: Ensure all employee salary data is up-to-date before running payroll. Changes after the run won't retroactively update.

Payslips

Generate and print individual payslips for any employee from a completed payroll run:

1. **Open Payroll Details**
   Click 'View Details' on any completed payroll run to see the full breakdown.
2. **Click 'Payslip'**
   Click the 'Payslip' button next to any employee's row.
3. **Print or Save**
   The payslip opens in a print-friendly format. Use Ctrl+P (or Cmd+P on Mac) to print or save as PDF.

Tip: Use 'Print Monthly Report' to generate a summary report of all employees for the selected month — great for accounting records.

06 Shifts & Clock-in

Schedule staff shifts, track clock-in and clock-out times, manage shift swaps, and monitor attendance in real time.

Overview

The Shifts & Clock-in module gives you full control over employee scheduling and time tracking. Create recurring or one-off shifts, allow employees to clock in and out from their devices, and review attendance data at a glance. Managers can approve shift swaps and monitor real-time coverage to ensure every position is staffed.

- Create and publish weekly or monthly shift schedules
- Real-time clock-in and clock-out tracking with timestamps
- Shift swap requests with manager approval workflow
- Overtime detection and automatic alerts
- Attendance dashboard with daily, weekly, and monthly views
- Break tracking and compliance with labor regulations
- Export attendance reports for payroll integration

Tip: Publish shift schedules at least one week in advance so employees have time to request swaps if needed.

Creating a Shift Schedule

Build shift schedules for your teams by assigning employees to specific time slots. You can create individual shifts or use templates for recurring patterns.

1. **Open the Shifts module**
   Navigate to Human Resources → Shifts & Clock-in from the main menu.
2. **Select the schedule period**
   Choose the week or month you want to schedule using the date picker at the top of the calendar view.
3. **Add a new shift**
   Click 'Add Shift' and select the employee, date, start time, end time, and assigned role or position.
4. **Use templates for recurring shifts**
   Click 'Apply Template' to load a saved schedule pattern. Templates can cover an entire week and be reused across periods.
5. **Publish the schedule**
   Once all shifts are assigned, click 'Publish' to notify employees of their upcoming schedule via email or in-app notification.

Note: Unpublished schedules are only visible to managers. Employees will not see their shifts until the schedule is published.

Clock-in & Clock-out

Employees can record their working hours by clocking in at the start of a shift and clocking out when it ends. The system captures exact timestamps for accurate attendance records.

1. **Clock in**
   On the employee dashboard, click the 'Clock In' button when starting your shift. The system records the exact time and marks you as present.
2. **Start and end breaks**
   Use the 'Start Break' and 'End Break' buttons to log break periods. Break time is tracked separately from working hours.
3. **Clock out**
   Click 'Clock Out' at the end of your shift. The total hours worked, including any breaks, are calculated automatically.
4. **Review your timesheet**
   Visit the 'My Timesheet' section to see a summary of all your clock-in and clock-out records for the current pay period.

Warning: If an employee forgets to clock out, a manager must manually close the shift. Unclosed shifts are flagged in the attendance report.

Managing Shift Swaps

Employees can request to swap shifts with a colleague. The swap must be approved by a manager to ensure proper coverage and compliance with scheduling rules.

1. **Request a swap**
   From your schedule view, click on the shift you want to swap and select 'Request Swap'. Choose an available colleague to swap with.
2. **Colleague accepts or declines**
   The colleague receives a notification and can accept or decline the swap request from their dashboard.
3. **Manager approval**
   Once the colleague accepts, the swap request goes to the manager for final approval. The manager reviews coverage and approves or rejects the swap.
4. **Schedule updates automatically**
   Upon approval, both employees' schedules are updated automatically and notifications are sent to confirm the change.

Tip: Encourage employees to request swaps at least 48 hours before the shift to give managers time to review and ensure adequate staffing.

07 Leave Management

Handle leave requests, approval workflows, leave balances, and different leave types including annual, sick, and personal leave.

Overview

The Leave Management module streamlines how your organization handles employee time off. Employees can submit leave requests directly from their dashboard, managers receive instant notifications for approval, and HR can track leave balances and accruals across the entire company. The system supports multiple leave types and enforces your organization's leave policies automatically.

- Submit and track leave requests with real-time status updates
- Configurable leave types: annual, sick, personal, maternity, paternity, and custom
- Automatic leave balance calculation and accrual tracking
- Multi-level approval workflow with delegation support
- Team calendar showing who is on leave at any given time
- Leave policy enforcement with blackout dates and minimum notice periods
- Carry-over rules for unused leave at year end
- Exportable leave reports for compliance and payroll

Tip: Set up leave policies and types before the start of the fiscal year so that balances are calculated correctly from day one.

Configuring Leave Types

Before employees can request time off, administrators must configure the leave types available in the organization. Each type can have its own accrual rules, balance limits, and approval requirements.

1. **Navigate to Leave Settings**
   Go to Human Resources → Leave Management → Settings to access the leave configuration panel.
2. **Add a new leave type**
   Click 'Add Leave Type' and enter the name (e.g., Annual Leave, Sick Leave), the annual entitlement in days or hours, and whether it requires documentation.
3. **Set accrual rules**
   Choose how leave is accrued: all at once at the start of the year, monthly, or per pay period. Configure carry-over limits for unused days.
4. **Define approval workflow**
   Specify who approves requests for this leave type. Options include direct manager, HR manager, or a custom approval chain.
5. **Save and activate**
   Click 'Save' to activate the leave type. It will immediately be available for employees to select when submitting requests.

Note: You can deactivate a leave type at any time without deleting it. Existing requests with that type will remain in the system.

Submitting a Leave Request

Employees can request time off in just a few clicks. The system checks balances automatically and routes the request through the configured approval workflow.

1. **Open the Leave Request form**
   From your dashboard, click 'Request Leave' or navigate to Human Resources → Leave Management → New Request.
2. **Select the leave type**
   Choose the type of leave from the dropdown (e.g., Annual Leave, Sick Leave). Your remaining balance for that type is displayed.
3. **Choose the dates**
   Select the start and end dates for your leave. The system calculates the number of working days, excluding weekends and public holidays.
4. **Add a reason or attachment**
   Optionally provide a reason for the leave and attach supporting documents such as a medical certificate if required.
5. **Submit the request**
   Click 'Submit' to send the request to your approver. You will receive a notification when the request is approved or declined.

Warning: Submitting a leave request does not guarantee approval. Do not make travel plans until your request has been officially approved.

Approving and Managing Requests

Managers and HR personnel can review, approve, or reject leave requests from a centralized queue. The team calendar helps identify potential coverage gaps before approving.

1. **Review pending requests**
   Go to Leave Management → Pending Approvals to see all requests awaiting your decision. Each request shows the employee, dates, leave type, and remaining balance.
2. **Check the team calendar**
   Click 'Team Calendar' to see an overview of who else is on leave during the same period. This helps ensure adequate team coverage.
3. **Approve or reject**
   Click 'Approve' or 'Reject' on each request. If rejecting, provide a reason so the employee understands why.
4. **Monitor balances**
   Use the 'Leave Balances' report to view all employees' remaining leave days by type. This report can be filtered by department or team.

Tip: Use the team calendar view regularly to anticipate periods of low staffing and plan accordingly.

08 Purchase Orders

Create purchase orders for suppliers, track order status through fulfillment, and manage goods receiving with full audit trails.

Overview

The Purchase Orders module manages your entire procurement process from requisition to receiving. Create purchase orders for your suppliers, track order status in real time, and record goods received against each order. The system maintains a full audit trail of every change and integrates seamlessly with your inventory and accounting modules.

- Create and send purchase orders to suppliers with itemized line details
- Track order status: Draft, Sent, Partially Received, Fully Received, Cancelled
- Goods receiving with quantity verification and quality notes
- Automatic inventory updates when goods are received
- Supplier management with contact details and order history
- Purchase order approval workflow for budget control
- PDF generation and email delivery of purchase orders to suppliers
- Integration with accounting for automatic expense recording

Tip: Link your supplier catalog to the Purchase Orders module so that item details, prices, and lead times auto-populate when creating new orders.

Creating a Purchase Order

Start the procurement process by creating a purchase order that specifies the items, quantities, and prices you need from a supplier.

1. **Open the Purchase Orders module**
   Navigate to Supply Chain → Purchase Orders from the main menu.
2. **Click 'New Purchase Order'**
   Start a new PO. Select the supplier from your supplier list or create a new supplier record on the spot.
3. **Add line items**
   Add each product or material you want to order. Specify the item name, SKU, quantity, unit price, and any applicable tax or discount.
4. **Set delivery details**
   Enter the expected delivery date, shipping address, and any special delivery instructions for the supplier.
5. **Submit for approval**
   If your organization requires PO approval, click 'Submit for Approval'. Otherwise, click 'Confirm' to finalize and send the PO directly to the supplier.

Note: Purchase orders in Draft status can be edited freely. Once a PO is Confirmed or Sent, changes require creating an amendment.

Receiving Goods

When a shipment arrives from a supplier, record it against the corresponding purchase order. The system supports partial receipts for orders that arrive in multiple shipments.

1. **Locate the purchase order**
   Go to Purchase Orders and find the PO you are receiving goods for. You can search by PO number, supplier name, or date.
2. **Click 'Receive Goods'**
   Open the receiving form for the PO. Each line item is listed with the ordered quantity and any previously received quantity.
3. **Enter received quantities**
   For each line item, enter the quantity actually received. If any items are damaged or missing, note the discrepancy in the comments field.
4. **Confirm receipt**
   Click 'Confirm Receipt' to update the PO status. Inventory levels are updated automatically, and the PO moves to Partially Received or Fully Received.

Warning: Always verify quantities physically before confirming receipt in the system. Confirmed receipts update inventory balances immediately and cannot be easily reversed.

Tracking and Reporting

Monitor all purchase orders across their lifecycle and generate reports to analyze procurement spend and supplier performance.

1. **Use the PO dashboard**
   The Purchase Orders dashboard shows all orders organized by status. Use filters to view orders by supplier, date range, or amount.
2. **View order history**
   Click on any PO to see its full history including creation, approval, sending, and receiving events with timestamps.
3. **Generate procurement reports**
   Go to Reports → Procurement to generate spend analysis by supplier, category, or time period. Identify your top suppliers and spending trends.

Tip: Review the 'Open Purchase Orders' report weekly to follow up on overdue deliveries and keep your supply chain running smoothly.

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09 Expense Tracking

Record, categorize, and report on all business expenses.

Recording Expenses

1. **Navigate to Expenses**
   Click 'Expenses' in the sidebar.
2. **Click 'Add Expense'**
   Enter the amount, date, category, vendor name, and optional description.
3. **Select Category**
   Choose from: Rent, Utilities, Salary, Payroll, Operations, Supplies, Transport, Marketing, Maintenance, Taxes, Insurance, or Other.
4. **Save**
   The expense is recorded and appears in the expense table and analytics.

Note: Payroll expenses are automatically generated when you run payroll — no need to enter them manually.

Expense Reports

- View total expenses by period (daily, weekly, monthly, yearly)
- Category breakdown with percentages
- Filter by category, date range, or vendor
- Export expense data to CSV for accounting

10 Accounting

Manage your chart of accounts, record journal entries, maintain the general ledger, and ensure accurate double-entry bookkeeping.

Overview

The Accounting module is the financial backbone of your organization. It provides a complete double-entry bookkeeping system with a customizable chart of accounts, journal entries, and a general ledger. Every financial transaction across the platform — from invoices to expenses to payroll — flows into the accounting module, giving you a single source of truth for your financial data.

- Customizable chart of accounts organized by category (assets, liabilities, equity, revenue, expenses)
- Double-entry journal entries with automatic balancing validation
- General ledger with drill-down to individual transactions
- Trial balance, income statement, and balance sheet generation
- Multi-currency support with automatic exchange rate conversion
- Fiscal year and period management with period locking
- Automated entries from sales, purchases, payroll, and expenses
- Audit trail for every financial transaction

Warning: Accounting data affects financial reporting and tax compliance. Ensure that only authorized users have access to create or modify journal entries.

Setting Up the Chart of Accounts

The chart of accounts defines the structure of your financial records. Set it up carefully as it forms the foundation for all financial reporting.

1. **Access the Chart of Accounts**
   Navigate to Finance → Accounting → Chart of Accounts to view and manage your account structure.
2. **Review default accounts**
   The system comes with a standard chart of accounts. Review each account to ensure it fits your business structure. Common categories include Cash, Accounts Receivable, Inventory, Revenue, and Cost of Goods Sold.
3. **Add custom accounts**
   Click 'Add Account' to create a new account. Specify the account code, name, type (asset, liability, equity, revenue, or expense), and parent account if applicable.
4. **Organize account hierarchy**
   Arrange accounts in a logical hierarchy using parent-child relationships. This makes financial reports easier to read and analyze.
5. **Set opening balances**
   For existing businesses, enter opening balances for each account as of your go-live date. This ensures your ledger starts with accurate figures.

Tip: Use a consistent numbering scheme for account codes (e.g., 1000s for assets, 2000s for liabilities, 3000s for equity, 4000s for revenue, 5000s for expenses) to keep your chart organized.

Recording Journal Entries

Journal entries are the building blocks of double-entry bookkeeping. Every transaction is recorded as a balanced entry with equal debits and credits.

1. **Create a new journal entry**
   Go to Accounting → Journal Entries → New Entry. Enter the date, a descriptive reference or memo, and select the journal (e.g., General, Sales, Purchases).
2. **Add debit and credit lines**
   For each line, select the account, enter the amount, and specify whether it is a debit or credit. The total debits must equal total credits for the entry to be valid.
3. **Attach supporting documents**
   Upload receipts, invoices, or other documentation to support the journal entry. This helps during audits and reviews.
4. **Post the entry**
   Click 'Post' to record the entry in the general ledger. Posted entries update account balances immediately.

Note: Many journal entries are created automatically by other modules. For example, confirming a sale creates a revenue entry, and recording an expense creates an expense entry. Manual journal entries are typically used for adjustments, corrections, and non-routine transactions.

Automated Ledger Sync

The Accounting module is seamlessly integrated with all operational modules. When financial transactions occur across the platform, the Ledger Sync engine automatically posts balanced double-entry journal entries in real time.

1. **Sales & POS**
   Completing a sale automatically debits Cash and credits Sales Revenue. Refunds reverse this entry automatically.
2. **Expenses**
   Creating an expense debits the specific expense category account (e.g., Rent, Utilities) and credits Cash.
3. **Rentals & Bookings**
   Checking out a car rental, event equipment, or property booking debits Cash and credits Service Revenue.
4. **School Fees**
   Recording a fee payment from a student automatically debits Cash and credits Fee Revenue.

Tip: Automated entries contain a reference link back to the original operational record (e.g., the specific Sale or Booking ID) for easy auditing.

Financial Reports

Generate essential financial reports to understand your business's financial position and performance at any point in time.

1. **Generate a Trial Balance**
   Go to Reports → Trial Balance to see a summary of all account balances. Use this to verify that total debits equal total credits across the ledger.
2. **View the Income Statement**
   Navigate to Reports → Income Statement (Profit & Loss) to see revenue and expenses for a selected period. This shows whether your business is profitable.
3. **Review the Balance Sheet**
   Go to Reports → Balance Sheet to see a snapshot of assets, liabilities, and equity at a specific date. This shows your company's financial position.
4. **Drill down into accounts**
   Click on any account in a report to see the individual transactions that make up the balance. This is useful for investigating discrepancies.

Tip: Close each fiscal period after reconciliation to prevent accidental posting. Locked periods protect the integrity of your historical financial data.

11 Analytics & Reports

View dashboards, financial summaries, and export business data.

Dashboard Analytics

The Analytics page provides visual charts and summaries of your business performance:

- Revenue trend — line chart showing daily/weekly/monthly revenue
- Top selling products — ranked list with quantities sold
- Sales by category — pie/bar chart breakdown
- Expense distribution — category-wise expense breakdown
- Monthly financial data — detailed table with revenue, expenses, and net income
- Payroll breakdown — gross salary, deductions, and net paid by month

Exporting Data

1. **Navigate to Analytics**
   Click 'Analytics' in the sidebar to view all reports.
2. **Select Period**
   Use the date range picker to choose the reporting period.
3. **Export**
   Click the 'Export' button to download data as CSV. Available for sales, inventory, expenses, and payroll.

Tip: Use the 'All Time' period selector for a complete business overview.

12 AI Chat Assistant

Ask questions in plain language and let the assistant act on your business data: look things up, draft purchase orders, create records, and more.

Overview

The AI Chat Assistant is agentic, not just a Q&A bot. Ask it a question in plain language and it retrieves the answer from your data; ask it to do something and, within your role's permissions, it can actually do it by calling the same backend the rest of the platform uses. It ships with dozens of domain-specific tool files, one per business area (inventory, purchase orders, customers, sales, HR, leave requests, students, patients, and every other module in your template), so its reach follows whatever modules your business template enables.

- Natural language queries about sales, inventory, finances, and operations
- Takes real action, not just answers: creates customer records, drafts purchase orders, adjusts stock levels, and more
- Dozens of domain-specific tools covering every module your business template enables, not a fixed generic set
- Multi-turn tool use: it can chain several lookups or actions together to satisfy one request
- Context-aware starter suggestions based on your business type
- Full conversation history, saved per user and browsable from the sidebar
- Restricted to Owner, Admin, and Super Admin roles
- Every tool call is scoped to your own organization's data and enforced by the same role-based permission checks used on every other page

Tip: Be specific, including exact names, IDs, or amounts, especially when asking the assistant to create or change something, so it acts on the right record.

Asking and Instructing

Start a conversation with the assistant by typing a question or an instruction in natural language. It interprets your intent, and either retrieves data or carries out the requested action through the platform's normal backend.

1. **Open AI Chat**
   Click 'AI Chat' in the sidebar. It's only visible to Owner, Admin, and Super Admin roles; other roles won't see it listed.
2. **Type your request**
   Enter a question like 'Show me total revenue for last quarter,' or an instruction like 'Add a new customer named Jane Doe' or 'Create a purchase order for 20 units of Product X from Supplier Y.'
3. **Review the response**
   The assistant replies in your interface language (English or French). If it took an action, the change is immediately reflected in the relevant module, such as the new customer appearing in Customers.
4. **Continue the conversation**
   Ask follow-ups to refine results, or click 'New Chat' to start fresh. Past conversations are listed on the left and can be reopened or deleted at any time.

Note: The assistant only accesses data your role can already see, and it's blocked from any action your role couldn't already perform directly. If AI Chat isn't enabled for your plan, you'll see an upgrade prompt instead of the chat.

What It Can Do

Beyond answering questions, the assistant can carry out tasks across the modules enabled for your business. A few grounded examples:

- Data lookups: 'How many units of Product X are in stock?'
- Aggregations and summaries: 'What was our total revenue last month?'
- Creating records: 'Add a new customer named Jane Doe, phone 6xx xxx xxx'
- Drafting purchase orders: 'Create a purchase order for Supplier Y for 50 units of Product X'
- Updating inventory: 'Add 20 units to the stock of Product X'
- Cross-module questions that pull from more than one module in the same answer, such as sales alongside expenses
- Whatever the tool set for your business template covers, from students and attendance in a school to patients and appointments in a hospital

Tip: After the assistant creates or changes something, check the result in the relevant module (Inventory, Customers, Purchase Orders, and so on) to confirm it matches what you intended.

Best Practices

Get reliable results from the AI Chat Assistant by following these guidelines.

- Start with specific, well-defined requests rather than vague ones
- Include exact names, IDs, or time periods so the assistant acts on or reports the right data
- Use follow-up messages to refine or drill deeper instead of one long, complex request
- Verify anything the assistant creates or changes in the relevant module afterward
- Remember only Owner, Admin, and Super Admin roles can access AI Chat
- If AI Chat isn't available to you, ask your Owner or Admin. Availability depends on your plan

Warning: The assistant can create and modify real records in your business, not just report on them. Review its actions the same way you would review a teammate's work, especially for anything financial or customer-facing.

13 Messaging

Communicate with your team through internal messaging, manage conversations, and share files securely within your organization.

Overview

The Messaging module provides a built-in communication hub for your organization. Send direct messages to colleagues, create group conversations for teams or projects, and share files without leaving the platform. All messages are stored securely within your tenant and are searchable, making it easy to find past conversations and shared information.

- One-on-one direct messaging between team members
- Group conversations for teams, departments, or projects
- File sharing with drag-and-drop support for documents, images, and more
- Real-time message delivery with read receipts
- Message search across all conversations
- Rich text formatting with mentions and links
- Notification preferences for managing message alerts
- Message pinning and bookmarking for important information

Tip: Use group conversations for project-specific communication to keep discussions organized and easily accessible to all team members involved.

Sending Messages

Start communicating with your team by sending direct messages or creating group conversations. The messaging interface is designed for quick, efficient communication.

1. **Open the Messaging module**
   Click the Messaging icon in the sidebar to open the messaging panel. Your recent conversations are displayed on the left.
2. **Start a new conversation**
   Click 'New Message' and select one or more recipients from your organization's directory. For a group conversation, add multiple people.
3. **Type and send your message**
   Compose your message in the text field. Use @mentions to tag specific people, and formatting options for bold, italic, or bullet lists. Press Enter or click Send.
4. **Share files**
   Drag and drop files into the conversation or click the attachment icon to upload documents, images, or other files. Shared files are accessible to all conversation participants.

Note: Messages are delivered in real time. If a recipient is offline, they will see the message and a notification badge when they next log in.

Managing Conversations

Keep your messaging organized by managing conversations, pinning important messages, and adjusting your notification settings.

1. **Pin important messages**
   Hover over a message and click the pin icon to pin it to the top of the conversation. Pinned messages are visible to all participants and serve as quick references.
2. **Search past conversations**
   Use the search bar at the top of the messaging panel to find messages by keyword, sender, or date. Results are displayed with context so you can jump directly to the relevant conversation.
3. **Manage notifications**
   Right-click on a conversation and select 'Notification Settings' to mute, set to priority, or customize how you receive alerts for that conversation.
4. **Archive old conversations**
   Archive conversations you no longer need in your active list. Archived conversations can be found in the 'Archived' section and restored at any time.

Tip: Use the bookmark feature to save individual messages you want to revisit later. Access all your bookmarks from the 'Saved Messages' section.

14 Documents

Upload, organize, and manage business documents with folder structures, tagging, version control, and secure sharing.

Overview

The Documents module serves as your organization's central file repository. Upload and organize business documents in a structured folder hierarchy, tag files for easy discovery, and control access with granular permissions. The module supports version control so you always have access to previous versions of important files, and it integrates with other modules to attach documents directly to records like invoices, employees, or projects.

- Upload files of any type with drag-and-drop support
- Folder-based organization with unlimited nesting levels
- Tagging system for cross-cutting file categorization
- Full-text search across document names, tags, and content
- Version history with the ability to restore previous versions
- Access control with view, edit, and admin permissions per folder or file
- Document preview for common file types (PDF, images, Office documents)
- Integration with other modules for attaching files to records

Tip: Establish a clear folder structure and naming convention before your team starts uploading files. This makes documents easier to find as your repository grows.

Uploading and Organizing Files

Add files to the document repository and organize them into folders for easy access. The system handles files of any type and size within your plan's storage limits.

1. **Navigate to Documents**
   Click on Documents in the sidebar to open the document manager. You'll see the root folder structure and any recently accessed files.
2. **Create folders**
   Click 'New Folder' to create a folder. Name it descriptively (e.g., 'Contracts', 'HR Documents', 'Financial Reports') and choose its location in the hierarchy.
3. **Upload files**
   Click 'Upload' or drag and drop files directly into the current folder. Multiple files can be uploaded simultaneously. A progress bar shows the upload status.
4. **Add tags to files**
   Select a file and click 'Add Tags' to assign descriptive tags (e.g., '2025', 'Legal', 'Approved'). Tags make files discoverable through search regardless of folder location.
5. **Move or copy files**
   Right-click a file and select 'Move' or 'Copy' to reorganize files between folders. Moving a file updates its location; copying creates a duplicate.

Note: Supported file previews include PDF, JPEG, PNG, GIF, Word, Excel, and PowerPoint files. Other file types can be downloaded for viewing in external applications.

Version Control

Keep track of document changes with automatic version history. Every time a file is updated, the previous version is preserved and can be restored if needed.

1. **Upload a new version**
   Select an existing file and click 'Upload New Version'. Choose the updated file from your computer. The system replaces the current version and archives the old one.
2. **View version history**
   Click on a file and select 'Version History' to see all previous versions with timestamps and the name of the user who uploaded each version.
3. **Restore a previous version**
   In the version history, click 'Restore' next to any previous version to make it the current active version. The previously active version is archived.
4. **Compare versions**
   For text-based documents, use the 'Compare' feature to see differences between two versions highlighted side by side.

Warning: Deleting a file removes all its versions permanently. Use the 'Archive' option instead if you may need the file again in the future.

Sharing and Permissions

Control who can access, view, and edit documents with flexible permission settings at both the folder and file level.

1. **Set folder permissions**
   Right-click a folder and select 'Permissions'. Assign View, Edit, or Admin access to specific users, roles, or departments. Permissions cascade to all files within the folder.
2. **Override file-level permissions**
   For sensitive files, you can set permissions directly on individual files that override the parent folder's settings.
3. **Share a file link**
   Click 'Share' on a file to generate a secure link. Configure whether the link requires authentication or can be accessed by anyone with the link, and set an expiration date.

Tip: Use role-based folder permissions for broad access control and file-level overrides only for exceptions. This keeps your permissions manageable as the team grows.

15 Workflow Automation

Create rules that fire automatically on business events, checking conditions and running actions without manual intervention.

Overview

Workflow Automation lets you define rules that run automatically when something happens in the business, a sale is made, stock runs low, a leave request is rejected, and so on. Each rule has a trigger event, optional conditions, and one or more actions. There is no visual drag-and-drop builder, rules are configured through a form with a fixed list of trigger events and JSON-based conditions and actions, which keeps them precise and predictable.

- Fixed list of real trigger events across sales, fees, appointments, lab results, inventory, leave, patients, purchase orders, payroll, and student records
- Conditions with operators: equals, not equals, greater than, greater or equal, less than, less or equal, contains, in
- Actions: in-app notification, WhatsApp message, create expense, post a journal entry, draft a purchase order, create a follow-up task, update a field on the record, or call an external webhook
- Priority ordering, and an enable/disable toggle per rule
- Run count and last-run timestamp shown on every rule
- A run log tab with the result and execution time of every firing

Tip: Start with one trigger and one simple action, confirm it fires correctly in the Run Logs tab, then add conditions or more actions.

Creating a Rule

Rules live under Workflow in the sidebar, on the Rules tab.

1. **Open Workflow**
   Click 'Workflow' in the sidebar. The Rules tab lists existing rules with their active/inactive status, priority, run count, and condition/action counts.
2. **Click 'New Rule'**
   Give the rule a name and optional description.
3. **Pick the trigger event**
   Choose from the fixed list, for example sale.created, inventory.low_stock, fee.overdue, appointment.no_show, leave.requested, patient.discharged, purchase_order.received, or student.fee_overdue.
4. **Set a priority**
   A number controlling the order rules run in when more than one matches the same event.
5. **Write the conditions (optional)**
   Enter a JSON array of conditions, for example [{"field": "amount", "operator": ">", "value": 1000}]. Leave it empty for the rule to always fire on the trigger event.
6. **Write the actions**
   Enter a JSON array of actions, for example [{"type": "notify", "title": "Alert", "message": "Sale of {{amount}}"}]. This field is required, invalid JSON is rejected before saving.
7. **Save**
   The rule becomes active immediately unless you leave the Active checkbox unticked.

Warning: Conditions and actions are entered as raw JSON, a malformed action array will be rejected on save rather than silently ignored, double-check the syntax before saving.

Managing Rules

- Toggle a rule active or inactive with one click, without deleting it
- Click 'Details' on a rule to see its conditions and actions as formatted JSON
- Edit a rule to change its trigger, conditions, actions, or priority
- Delete a rule permanently (a confirmation prompt appears first)
- The stats bar at the top shows total rules, active rules, total runs, and overall success rate

Run Logs

Switch to the Run Logs tab to see every time a rule has fired.

- Each row shows the rule name, the trigger event, the result (success, failed, or skipped), the execution time in milliseconds, any error message, and the timestamp
- Use this tab to confirm a new rule actually fires, and to diagnose a rule that isn't producing the expected notification or record

16 Settings

Configure business profile, branding, and system preferences.

Settings Configuration

- Business name and profile information
- Currency selection (affects all financial displays)
- Timezone and date format
- Language (English/French)
- Theme (Light/Dark mode)
- Logo and branding colors
- Feature toggles (analytics, audit, websocket)
- Notification preferences
- Danger zone: reset to defaults

17 Branch Management

Set up and manage multiple business locations.

Managing Branches

1. **Add Branch**
   Branches → Add Branch. Enter name, location, and assign a manager.
2. **Assign Staff**
   When adding/editing team members, select their branch from the dropdown.
3. **Branch Filtering**
   Use branch filters on team, sales, and inventory pages to view location-specific data.

18 Audit Logs

Track all system activity and changes.

Viewing Audit Logs

Navigate to Audit Log from the sidebar. Every action in the system is recorded:

- User who performed the action
- Action type (CREATE, UPDATE, DELETE)
- Entity affected (Product, Sale, Patient, etc.)
- Timestamp
- IP address
- Before/after data changes

19 Notifications

View and manage system alerts and notifications.

Notification Types

- Low stock alerts when inventory drops below threshold
- New sale confirmations
- Payment received notifications
- Appointment reminders (Hospital)
- Fee due reminders (School)
- Lab results ready (Hospital)
- Suspicious activity alerts

Managing Notifications

1. **View Notifications**
   Click the bell icon in the top bar to see recent notifications.
2. **Mark as Read**
   Click individual notifications or use 'Mark All as Read'.
3. **Notification Page**
   Navigate to Notifications in sidebar for full history with filters.

20 Edutech Overview

Complete guide to managing a school with Fiap Systems.

What's Included

The School template provides a complete academic management system:

- Student enrollment and profile management
- Teacher staff management with subject/class assignments
- Academic structure: School Years → Terms → Classes → Subjects
- Fee management with payment tracking
- Daily attendance marking by class
- Results entry with report card generation
- Parent Portal for guardian access (web + mobile)

Getting Started with School

1. **Set Up Academic Structure**
   Go to Academics → Create a School Year → Add Terms → Add Classes → Add Subjects per class.
2. **Add Teachers**
   Go to Teachers → Add Teacher with name, specialization, and qualification. Assign subjects and classes.
3. **Enroll Students**
   Go to Students → Add Student with personal details, class assignment, and guardian information.
4. **Configure Fees**
   Go to Fees → Create fee structures per class (Tuition, Registration, Transport, etc.).
5. **Link Parents**
   Link parent accounts to students for portal access via the Parent Portal module.

21 Student Management

Enroll students, manage profiles, and track academic records.

Enrolling Students

1. **Navigate to Students**
   Click 'Students' in the sidebar to open the student directory.
2. **Click 'Add Student'**
   Fill in: First Name, Last Name, Date of Birth, Gender, Class, Guardian Name, Guardian Phone, Guardian Email.
3. **Admission Number**
   An admission/registration number is auto-generated. This is used for portal login.
4. **Additional Info**
   Optionally add: Blood Group, Medical Info, and Address.
5. **Save**
   The student appears in their assigned class and is ready for attendance, fees, and results.

Tip: The student's Registration Number + Date of Birth is used for Student Portal login on the mobile app.

Managing Students

- Search by name or admission number
- Filter by class
- View individual student profile with full academic history
- Edit student details or transfer between classes
- View linked parent accounts

22 Admissions

Manage the student admission process, track applications, and handle enrollment.

Overview

The Admissions module streamlines the entire student intake process — from initial application to final enrollment. It centralizes applicant data, tracks each application's progress through review stages, and converts approved applicants into enrolled students with a single click.

- Online and in-person application intake
- Application status tracking (Pending, Reviewing, Accepted, Rejected, Enrolled)
- Document checklist for required paperwork
- Automatic admission number generation upon enrollment
- Bulk admission processing for new academic years
- Admission statistics and reports by class and term

Creating a New Application

1. **Navigate to Admissions**
   Click 'Admissions' in the sidebar. The dashboard displays current admission statistics: total applications, pending reviews, accepted, and enrolled counts.
2. **Click 'New Application'**
   Fill in the applicant's personal details: first name, last name, date of birth, gender, and contact information.
3. **Select Target Class**
   Choose the class the applicant is applying to. This determines the available fee structures and capacity checks.
4. **Add Guardian Information**
   Enter the parent or guardian's name, phone number, email, and relationship to the student.
5. **Attach Documents**
   Upload or note required documents such as birth certificate, previous school records, and medical clearance.
6. **Submit Application**
   Click 'Submit'. The application is saved with a status of 'Pending' and appears in the application queue for review.

Tip: Enable the document checklist in Settings → Admissions to ensure all required paperwork is collected before processing.

Processing Applications

1. **Review Queue**
   Open the 'Pending' tab to see all unreviewed applications. Click any row to view full details.
2. **Update Status**
   Change the application status to 'Reviewing' while processing, then to 'Accepted' or 'Rejected' based on your decision.
3. **Enroll Accepted Students**
   For accepted applications, click 'Enroll'. The system creates a full student record, assigns an admission number, and applies the relevant fee structure automatically.

Warning: Once an applicant is enrolled, their application record is locked. Make sure all details are correct before clicking 'Enroll'.

Admission Reports

Track admission trends and manage capacity effectively with built-in reports:

- Applications by status — see how many are pending, accepted, or rejected
- Class capacity tracker — monitor how many seats remain per class
- Admission timeline — view application volume over time
- Conversion rate — percentage of applications that result in enrollment

Note: Reports update in real-time as application statuses change. Use them during admission periods to avoid over-enrollment.

23 Teacher Management

Add teachers, assign subjects and classes.

Adding Teachers

1. **Navigate to Teachers**
   Click 'Teachers' in the sidebar.
2. **Click 'Add Teacher'**
   Enter: First Name, Last Name, Email, Phone, Specialization, Qualification.
3. **Save**
   The teacher is created with role TEACHER and can log in to mark attendance and enter results.

Assigning Subjects & Classes

1. **Manage Subjects**
   Click 'Manage Subjects' on a teacher's row. Select subjects from the available list and click 'Assign'.
2. **Manage Classes**
   Click 'Manage Classes' to assign the teacher to one or more classes.

Note: Teachers can only see students in their assigned classes when marking attendance or entering results.

24 Teacher Presence

Track daily teacher check-in, check-out, and attendance status.

Overview

Teacher Presence is a daily register for teaching staff — separate from the student-facing Attendance module. A date picker drives a per-teacher sheet where you set a status, optional check-in/check-out times, and a note for each teacher, then commit every change in a single save.

- Date-driven daily sheet, one row per teacher
- Inline status selector: Present, Absent, or Late
- Optional check-in and check-out time fields
- Free-text notes per teacher per day
- Live summary counts that update as you edit, before saving
- Stat cards: Total Teachers, Present, Absent, Late, Unmarked, and overall Presence Rate

Marking Daily Presence

1. **Navigate to Teacher Presence**
   Click 'Teacher Presence' in the sidebar. The sheet loads for today's date by default.
2. **Pick a Date**
   Use the date field to browse a different day. A 'Today' shortcut appears whenever you've navigated away from the current date.
3. **Set Each Teacher's Status**
   Use the status dropdown on each row: Unmarked, Present, Absent, or Late.
4. **Add Check-in / Check-out**
   Optionally fill in the time fields for when the teacher arrived and left.
5. **Add a Note**
   Optionally type a free-text note for context (e.g., reason for lateness).
6. **Save Presence**
   Click 'Save Presence'. Only rows with a chosen status are submitted. Unsaved edits are highlighted and can be discarded with 'Discard' before saving.

Tip: The stat cards at the top track today's totals plus an overall presence rate across every recorded day — use them to spot attendance patterns over time.

25 Substitutions

Plan and record replacement teachers when a staff member is absent.

Overview

The Substitutions module tracks temporary teacher swaps — pairing a substitute teacher with an original teacher's class and subject for a given date and period, moving through an approval workflow from Pending to Completed.

- Original teacher and substitute teacher assignment
- Class, subject, date, and period linkage
- Reason and notes fields (e.g., sick leave, training)
- Status workflow: Pending → Approved → Completed, or Cancelled
- Stat cards: Total, Pending, Approved, Completed
- Status filter tabs: All, Pending, Approved, Completed, Cancelled

Recording a Substitution

1. **Navigate to Substitutions**
   Click 'Substitutions' in the sidebar.
2. **Click 'New Substitution'**
   Opens the substitution form.
3. **Select Original & Substitute Teacher**
   Choose the teacher being replaced and the teacher covering for them.
4. **Select Class, Subject, Date & Period**
   Pick the class and subject affected, the date, and (optionally) the period, e.g. 'Period 1'.
5. **Add Reason & Notes**
   Optionally note the reason (e.g., 'Sick leave') and any extra context.
6. **Save**
   The substitution is created with status 'Pending'.

Managing the Approval Workflow

1. **Filter by Status**
   Use the status tabs to narrow the list to Pending, Approved, Completed, or Cancelled substitutions.
2. **Approve a Pending Request**
   Click 'Approve' on a Pending row to move it to Approved.
3. **Mark as Completed**
   Click 'Complete' on an Approved row once the covered class has taken place.
4. **Delete a Record**
   Remove a substitution entirely if it was recorded in error.

Note: Substitute teachers are chosen from the same Teachers directory — record the substitution before the covered class starts so the schedule stays accurate.

26 Academic Setup

Configure school years, terms, classes, and subjects.

Academic Structure

The academic module follows a hierarchy: School Year → Terms → Classes → Subjects.

1. **Create School Year**
   Go to Academics → 'Add School Year'. Enter name (e.g., '2025-2026'), start date, and end date. Mark as 'Current Year'.
2. **Add Terms**
   Select a school year → 'Add Term'. Enter term name (e.g., 'Term 1'), start/end dates. Mark as 'Current Term'.
3. **Create Classes**
   Click 'Add Class'. Enter class name (e.g., 'Grade 5'), code, grade level, and max capacity.
4. **Add Subjects**
   Select a class → 'Add Subject'. Enter subject name, code, and description.

Tip: Mark one school year and one term as 'Current' — this is used as the default for attendance and results entry.

27 Student Promotion

Move students to the next class in bulk at the end of a school year, with pass, repeat, and graduate handling.

Overview

Student Promotion automates end-of-year class advancement. It pulls each student's overall average for a selected class and school year, proposes a default action based on a configurable pass mark, and lets you override individual students before committing the whole batch.

- Automatic Promoted / Repeated / Graduated suggestion based on average score vs. pass mark
- Per-student manual override with an optional remark
- Live summary counts (promoted / repeated / graduated) before you commit
- Confirmation step before the bulk update runs
- Full promotion history log, filterable by school year

Running a Promotion Batch

1. **Navigate to Student Promotion**
   Go to Academics → Promotion.
2. **Select School Year & Class**
   Choose the school year and the class you want to promote.
3. **Set the Pass Mark**
   Enter the minimum average required to be promoted (defaults to 50).
4. **Click 'Load Students'**
   The class roster loads with each student's overall average for that year.
5. **Check the Class Banner**
   It shows the class's next class, or a 'Final Class' badge if none is configured — students in a final class default to Graduated instead of Promoted.
6. **Review Each Student's Row**
   Each row shows the overall average, a Pass/Fail badge, and the default action (Promoted, Repeated, or Graduated).
7. **Override Where Needed**
   Change any student's action from the dropdown and add an optional remark to explain the override.
8. **Click 'Bulk Promote'**
   Review the confirmation summary (counts of promoted / repeated / graduated) and confirm to commit the batch.

Note: A class's 'next class' is configured by an administrator when the class is set up. Classes without one are treated as terminal, so their students are marked Graduated by default rather than Promoted.

Promotion History

Switch to the History tab to review past promotion runs for a school year:

- Student Name, From Class, To Class, Action, Overall Average, Date, and Promoted By columns
- Filter the history by school year

28 Fee Management

Create fee structures, collect payments, run installment plans and sibling discounts, and track balances.

Fee Structures

1. **Navigate to Fees**
   Click 'Fees' in the sidebar. The page has six tabs: Fee Structures, Payments, Tuition, Outstanding, Reports, and Student History.
2. **Click 'Add Fee Structure'**
   Fill in Class, Term (optional, leave it blank for an annual fee), Fee Name, Amount, Fee Type (Tuition, Registration, Lab, Transport, Exam, or Other), Billing Cycle (Monthly, Termly, or Annual), Description, and Due Date.
3. **Set a Late Fee Policy (Optional)**
   Enter Late Fee (% of amount), Late Fee (flat), and Grace Days (after due date) to add a penalty automatically once a balance goes overdue. Leave all three empty to skip late fees for this fee.
4. **Save**
   The fee structure is created and applies to every student in the selected class.

Tip: Edit or delete a fee structure any time from the row actions on the Fee Structures table.

Collecting Payments

1. **Click 'Record Payment'**
   This button sits at the top of the Fees page and opens the payment form from any tab.
2. **Select Student and Fee**
   Search for the student, then choose which fee structure the payment applies to.
3. **Enter the Amount**
   Enter the amount being paid. It cannot exceed the student's remaining balance for that fee, already net of any active waivers.
4. **Choose a Payment Method**
   Pick Cash, Mobile Money, Card, Bank Transfer, or Credit.
5. **Mobile Money (Optional)**
   Choosing Mobile Money reveals a provider choice (Orange Money or MTN MoMo) and a phone number field. Click 'Pay Now' to push a payment prompt to the payer's phone. The dialog polls automatically and confirms once they approve, or reports a failure if they decline or the request expires.
6. **Save**
   For non-Mobile-Money methods, add optional notes and a payment date, then save. A receipt is generated immediately and can be printed from the Payments tab.

Tip: Parents can also make fee payments through the Parent Portal on the mobile app.

SMS Fee Reminders

1. **Click 'Send fee reminders'**
   This button sits next to 'Record Payment' at the top of the Fees page.
2. **Narrow the Audience (Optional)**
   Choose a class and/or a specific fee structure to limit who receives the reminder. Leave both blank to include every student who owes.
3. **Send**
   Click 'Send reminders'. The result shows how many parents were sent a message, how many were skipped, and the total number of students who owe that were matched.

Note: SMS delivery requires the SMS gateway to be configured. See SMS Settings.

Voiding a Payment

Every payment on the Payments tab has a 'Void' button (requires the fees-delete permission).

1. **Click 'Void'**
   Click 'Void' on the payment's row.
2. **Confirm**

Confirm the void. The original receipt is kept as an audit trail, the payment stops counting toward the student's balance, and a reversing entry is posted to the accounting ledger so revenue stays accurate.

Warning: Voiding cannot be undone from the interface. If the amount needs to be collected again, record a new payment.

Installment Plans

1. **Look Up the Student**
   Go to the Reports tab and use Student Balance Lookup to find the student.
2. **Click 'Installments'**
   Next to any fee the student still owes, click 'Installments'.
3. **Set the Plan**
   Enter the number of installments (2 to 24), the number of days between installments, and the first due date, then save.

Note: The remaining balance is split evenly across the installments, with the last one absorbing any rounding. Payments recorded afterward apply oldest-first against the schedule automatically.

Sibling Discount

1. **Click 'Sibling Discount'**
   This button is at the top of the Fees page.
2. **Set the Terms**
   Enter the discount percentage and the minimum number of siblings that must be enrolled for a family to qualify (defaults to 2).
3. **Apply**
   Submit the form. The system scans every enrolled student, groups them into families by linked parent account (or shared parent phone number as a fallback), and issues a fee waiver at the entered percentage to every sibling except the eldest in each qualifying family.

Note: A confirmation message reports how many discounts were issued.

Reports, Outstanding & Tuition Tracking

- Outstanding: every student who currently owes on any fee, with parent/guardian contact info and a total-owed summary. This is the 'who owes fees' view.
- Tuition: tracks only Tuition-type fee structures across all enrolled students (paid and unpaid), with expected/collected/outstanding summary cards.
- Reports: date-filtered collection totals, a breakdown by payment method and by class, and the full list of payments for the selected period.
- Student Balance Lookup (on the Reports tab): check any student's balance, open their installment plan, or click 'Statement' to print a chronological ledger of every charge and payment with a running balance.
- Student History: pick a student to see their complete payment history with printable receipts.

29 Fee Waivers

Grant scholarships, bursaries, waivers, or state subventions that automatically reduce a student's fees.

What Fee Waivers Do

A fee waiver is a per-student relief that reduces the fees they owe. Every active waiver is applied automatically wherever a balance is shown: the Fees page, Outstanding, Reports, statements, and payment recording.

- Four types: Scholarship, Bursary, Waiver, and State subvention
- Reduces fees by either a fixed amount or a percentage, never both at once
- Can apply to every fee the student owes, or be scoped to one specific fee structure
- Reflected automatically in the student's balance, statement, and payment ceiling

Granting a Waiver

1. **Navigate to Fee Waivers**
   Click 'Fee Waivers' in the sidebar.
2. **Click 'New Waiver'**
   Select the Student and the Type (Scholarship, Bursary, Waiver, or State subvention).
3. **Set the Reduction**
   Enter either a Fixed Amount or a Percentage, not both. The backend rejects a submission that has neither or both filled in.
4. **Set the Scope (Optional)**
   Choose a specific Fee Structure to limit the waiver to one fee, or leave it as 'All fees' to reduce every fee the student owes.
5. **Add a Reason (Optional)**
   Enter a short note explaining the relief, useful for later review.
6. **Save**
   The waiver becomes active immediately. It is picked up the next time any balance, statement, or payment form is loaded for that student.

Revoking a Waiver

1. **Find the Waiver**
   Locate it in the Active Waivers table, searchable by student name, admission number, or reason.
2. **Click 'Revoke'**
   Click 'Revoke' on the waiver's row and confirm.

Note: Revoking deactivates the waiver. It stops reducing the student's fees immediately but the record is kept for history; it does not undo payments already made.

30 Attendance

Mark daily attendance by class and view reports.

Marking Attendance

1. **Navigate to Attendance**
   Click 'Attendance' in the sidebar.
2. **Select Class**
   Choose a class from the dropdown. All students in that class are loaded.
3. **Select Date**
   Choose the date (defaults to today).
4. **Mark Each Student**
   Click to mark each student as Present (green), Absent (red), Late (yellow), or Excused (blue).
5. **Quick Mark**
   Use 'All Present' or 'All Absent' buttons to bulk-mark the entire class.
6. **Save**
   Click 'Save Attendance'. A success message confirms the records are saved.

Warning: Attendance can only be marked once per student per day. To change, re-save with the updated status.

Attendance Reports

- Daily summary showing present/absent/late counts per class
- Monthly attendance report with percentages
- Student-specific attendance history
- Stats cards: Today Marked, Present Today, Absent Today, Late Today

31 Results & Report Cards

Enter exam scores, generate report cards, and view class rankings.

Entering Results

1. **Navigate to Results**
   Click 'Results' in the sidebar. The page has tabs: Enter Marks, Report Card, Class Ranking, Grade Scale.
2. **Select Filters**
   Choose Class, Subject, and Term from the dropdowns.
3. **Enter Scores**
   A table shows all students in the class. Enter the score for each student (out of max marks).
4. **Save Scores**
   Click 'Save Scores' to persist all entries.

Tip: Teachers can enter scores for their assigned subjects only. Admins can enter for all.

Report Cards

1. **Go to Report Card Tab**
   Select the student and term.
2. **View Report Card**
   A formatted report card shows all subjects, scores, grades, and overall average.
3. **Print**
   Use Ctrl+P to print the report card.

Grade Scale

Configure your grading system from the 'Grade Scale' tab:

- Define letter grades (A, B, C, etc.) with min/max percentages
- Add remarks for each grade (Excellent, Good, Average, etc.)
- Seed default grades with one click
- Grades auto-calculate based on entered scores

32 Gradebook Analytics

Visualize student transcripts, subject performance, and term-over-term trends.

Overview

Gradebook Analytics is a read-only insights layer on top of the scores entered in Results & Report Cards. Rather than entering marks or printing a single report card, it lets you explore a student's full transcript, drill into how a subject performed across a whole class, and compare a class's subject averages term over term.

- Student Transcript — search a student, see cumulative GPA and every term's subject scores in one view
- Subject Analytics — average, median, highest, lowest, pass rate, and fail rate for a subject in a term
- Grade distribution bar chart showing how many students landed in each letter grade
- Top Performers and Needs Improvement ranked lists
- Term Comparison — a class's per-subject average side by side across every term, color-coded

Viewing a Student Transcript

1. **Open the Transcript Tab**
   This is the default tab on Gradebook Analytics.
2. **Search for a Student**
   Type a name or ID; matching students appear in a dropdown. Click one to load their transcript.
3. **Read the Summary**
   The header shows the student's cumulative GPA, number of terms, and total subject entries.
4. **Review Per-Term Cards**
   Each term is its own card listing every subject with score/max, percentage, grade, and remark.

Analyzing a Subject

1. **Open the Subject Analytics Tab**
   Switch tabs at the top of the page.
2. **Select Subject and Term**
   Both filters are required before data loads.
3. **Read the Stats Grid**
   Total Students, Average, Median, Highest, Lowest, Pass Rate, and Fail Rate.
4. **Check the Grade Distribution**
   A bar chart shows how many students received each letter grade.
5. **Review Top & Bottom Performers**
   Two side-by-side lists rank the highest and lowest scores for the subject.

Comparing Terms

1. **Open the Term Comparison Tab**
   Switch tabs at the top of the page.
2. **Select a Class**
   The grid loads once a class is chosen.
3. **Read the Grid**
   One row per subject, one column per term; each cell is the class average for that subject in that term, color-coded green (80%+), amber (50-79%), or red (below 50%).

Tip: Use Term Comparison to catch a subject whose class average is sliding term over term before report cards are finalized.

33 Timetable

Create and manage class schedules, periods, and room assignments.

Overview

The Timetable module lets you build weekly class schedules for every class in your school. Define time periods, assign subjects to slots, allocate rooms, and ensure teachers are not double-booked. Students and teachers can view their personalized timetables from their respective portals.

- Weekly timetable grid with drag-and-drop editing
- Period management with customizable start and end times
- Room and venue assignment per session
- Teacher conflict detection — prevents double-booking
- Per-class and per-teacher timetable views
- Break and free period scheduling

Setting Up Periods

Before building timetables, define the daily period structure that applies across all classes:

1. **Navigate to Timetable**
   Click 'Timetable' in the sidebar. Switch to the 'Periods' tab.
2. **Add Periods**
   Click 'Add Period'. Enter the period name (e.g., 'Period 1'), start time, and end time. Repeat for all teaching periods in a day.
3. **Add Breaks**
   Create break periods (e.g., 'Morning Break', 'Lunch') with their respective times. Mark them as 'Break' type so they appear differently on the grid.
4. **Order Periods**
   Arrange periods in chronological order. The timetable grid will use this order to display columns.

Tip: Most schools have 6-8 teaching periods and 2-3 breaks per day. Set up the period structure once — it applies to all classes.

Building a Class Timetable

1. **Select Class**
   On the 'Timetable' tab, choose a class from the dropdown. An empty weekly grid appears with days as rows and periods as columns.
2. **Assign Subjects**
   Click an empty cell in the grid. Select a subject from the dropdown, assign a teacher, and optionally specify a room or venue.
3. **Repeat for All Slots**
   Fill in all periods across the week. The system highlights conflicts in red if a teacher is already assigned to another class at the same time.
4. **Save Timetable**
   Click 'Save' to finalize the schedule. It becomes visible to teachers and students immediately.

Warning: Changing the period structure after timetables are built may require re-assigning some slots. Always finalize periods before building timetables.

Viewing Timetables

Different users see timetables tailored to their role:

- Class view — shows the full weekly schedule for a specific class
- Teacher view — shows only the periods a teacher is assigned to across all classes
- Room view — shows which classes occupy a specific room at each period
- Student portal — students see their class timetable on the mobile app

Note: Timetables are linked to the current term. When a new term starts, you can duplicate the previous timetable and modify it as needed.

34 Exam Scheduling

Schedule exam sessions, assign venues, and view class rankings once results are in.

Overview

Exam Scheduling focuses on planning when and where exams happen, separate from Exam Management, which handles entering marks. Once exam dates for a class and term have passed, its Aggregation tab rolls up subject averages and a full student ranking.

- Exam session list: class, subject, term, exam type, date, start/end time, venue, max score, and notes
- Automatic Upcoming / Done badge based on the exam date
- Stat cards: Total Scheduled, Upcoming, Completed
- Aggregation tab: subject-average bars and a ranked student table for a chosen class and term

Creating an Exam Schedule

1. Navigate to Exam Scheduling
   Click 'Exam Scheduling' in the sidebar.
2. Click 'New Schedule'
   Opens the schedule form.
3. Select Class, Subject & Term
   All three are required.
4. Choose Exam Type
   Midterm, Final, Quiz, or Other.
5. Set Date, Time & Venue
   Exam date is required; start time, end time, and venue are optional.
6. Set Max Score
   Defaults to 100.
7. Save
   The schedule appears in the list with an Upcoming badge until its date passes.

Viewing Aggregated Results

1. Open the Aggregation Tab
   Switch tabs at the top of the page.
2. Select Class and Term
   Both filters are required before results load.
3. Review Subject Averages
   A progress bar per subject, color-coded green (75%+), amber (50-74%), or red (below 50%), with the student count for that subject.
4. Review the Ranking Table
   Students ranked by total score, showing rank, subjects counted, total score, and average.

35 Exam Management

Schedule exams, configure grading, and manage mark entry for all classes.

Overview

The Exam Management module handles the complete examination lifecycle — from scheduling exam dates to entering marks and publishing results. It integrates with the Results module for report card generation and supports multiple exam types like midterms, finals, quizzes, and practicals.

- Exam scheduling with date, time, and venue assignments
- Multiple exam types: Midterm, Final, Quiz, Practical, Mock
- Per-subject exam configuration with max marks and passing marks
- Bulk mark entry by class and subject
- Automatic grade calculation based on configured grade scales
- Exam timetable generation and printing

Scheduling Exams

1. **Navigate to Exams**
   Click 'Exams' in the sidebar. The exam dashboard shows upcoming exams, recent results, and quick stats.
2. **Create Exam Session**
   Click 'New Exam'. Enter the exam name (e.g., 'Mid-Term Exams 2026'), select the term, and choose the exam type.
3. **Add Subjects to Exam**
   For each class participating, select the subjects to be examined. Set the max marks, passing marks, and exam date for each subject.
4. **Assign Venues**
   Optionally assign examination rooms or halls for each subject. This helps with seating arrangement planning.
5. **Publish Schedule**
   Click 'Publish' to make the exam schedule visible to teachers, students, and parents through their portals.

Tip: Create exam sessions at the beginning of each term so teachers and students know the examination dates well in advance.

Entering Marks

1. **Select Exam and Subject**
   Go to the 'Mark Entry' tab. Select the exam session, class, and subject. A list of all students in the class appears.
2. **Enter Scores**
   Type the score for each student. The system validates that entries don't exceed the max marks. Leave blank for absent students.
3. **Mark Absent Students**
   Toggle the 'Absent' checkbox for students who did not sit the exam. They receive no score but are recorded as absent.
4. **Save Marks**
   Click 'Save All'. Grades are automatically calculated based on your grade scale configuration.

Warning: Double-check all marks before saving. Once results are published to the parent portal, corrections require admin approval.

Exam Reports

Generate detailed reports for analysis and record-keeping:

- Class performance summary — average scores, pass/fail counts per subject
- Student ranking — ordered list by total marks or average percentage
- Subject analysis — highest, lowest, and average scores per subject
- Exam timetable printout — formatted schedule for noticeboard display

Note: Exam results feed directly into the Results module for report card generation. You don't need to re-enter marks.

36 Assignments

Create homework and assignments, track submissions, and manage deadlines.

Overview

The Assignments module enables teachers to create, distribute, and track homework and coursework assignments. Students can view their assignments through the student portal, and teachers can monitor submission status and provide feedback — all from a single interface.

- Create assignments with title, description, and due date
- Assign to specific classes or individual students
- File attachment support for assignment materials
- Submission tracking with status indicators
- Late submission flagging with configurable grace periods
- Teacher feedback and scoring per submission

Creating an Assignment

1. **Navigate to Assignments**
   Click 'Assignments' in the sidebar. The page shows all assignments with their status, class, subject, and due date.
2. **Click 'New Assignment'**
   Enter the assignment title and a detailed description of the task. Include specific instructions students need to follow.
3. **Set Subject and Class**
   Select the subject and target class. The assignment will be visible to all students in that class.
4. **Set Due Date**
   Choose the submission deadline. Submissions after this date are automatically flagged as late.
5. **Attach Materials**
   Optionally upload reference files, worksheets, or reading materials that students need for the assignment.
6. **Publish**
   Click 'Publish' to make the assignment visible to students. Save as 'Draft' to finalize later.

Tip: Use the 'Draft' status to prepare assignments in advance and publish them at the right time during the term.

Tracking Submissions

Monitor which students have submitted their work and manage the review process:

1. **Open Assignment Details**
   Click any assignment to see its submission dashboard. A list shows every student with their submission status: Submitted, Pending, or Late.
2. **Review Submissions**
   Click on a student's submission to view their work. Add comments, feedback, or a score.
3. **Flag Late Submissions**
   Late submissions are automatically highlighted. You can choose to accept them with or without a penalty.

Note: Students receive notifications when a new assignment is published and reminders as the due date approaches.

Assignment Reports

- Submission rate by class — percentage of students who submitted on time
- Average scores per assignment — track class performance trends
- Student-level history — view all assignments and scores for a specific student
- Overdue assignments — list all pending submissions past their due date

37 Syllabus Tracking

Track curriculum topics per subject and monitor how much of the syllabus each teacher has covered.

Overview

Syllabus Tracking breaks a subject and class's curriculum down into an ordered list of topics, then tracks each topic's coverage status per teacher. It gives admins a school-wide view of how much of the curriculum has actually been taught.

- Syllabus records grouped by subject, class, and (optionally) term
- Ordered topic list per syllabus
- Four coverage statuses: Not Started, In Progress, Completed, Skipped — each with a color-coded badge
- Per-topic notes from the covering teacher
- School-wide dashboard: Total Syllabi, Total Topics, Completed Topics, Average Coverage
- Coverage-by-subject and coverage-by-teacher progress bars

Creating a Syllabus

1. **Navigate to Syllabus**
   Click 'Syllabus' in the sidebar.
2. **Click 'New Syllabus'**
   Opens the syllabus form.
3. **Set Title, Subject, Class & Term**
   Title, Subject, and Class are required; Term is optional.
4. **Save**
   The new syllabus opens directly in its detail view, ready for topics.
5. **Add Topics**
   Type a topic title (and optional description) and click 'Add'. Repeat for every topic in the curriculum.

Recording Coverage (Teachers)

1. **Open a Syllabus**
   Click any syllabus you're assigned to from the list.
2. **Advance a Topic's Status**
   Click 'Next' on a topic to cycle its status: Not Started → In Progress → Completed → Skipped.
3. **Add a Note**
   Optionally type a note next to the topic and click 'Save' to attach it to your coverage record.

Monitoring Coverage (Admins)

- Coverage by Subject — a progress bar per subject across the whole school
- Coverage by Teacher — cards showing each teacher's Done, In Progress, and Total topic counts
- Edit or delete individual topics
- Edit or delete a syllabus

Tip: Coverage percent is computed automatically from completed topics — there's nothing to calculate by hand.

38 Announcements

Send school-wide announcements and targeted messages to students, parents, and staff.

Overview

The Announcements module is your school's central communication hub. Broadcast important messages to the entire school or target specific audiences — classes, parents, teachers, or individual students. Announcements appear on dashboards, portals, and mobile app notifications.

- School-wide broadcasts visible to all users
- Targeted messaging by class, role, or specific recipients
- Priority levels: Normal, Important, Urgent
- Push notifications to mobile app (student and parent portals)
- Scheduled announcements for future publication
- Announcement archive and search

Creating an Announcement

1. **Navigate to Announcements**
   Click 'Announcements' in the sidebar. The page displays recent announcements in reverse chronological order.
2. **Click 'New Announcement'**
   Enter a clear, descriptive title and the full announcement message. Use formatting to highlight key information.
3. **Select Target Audience**
   Choose who should see this announcement: 'All' for school-wide, or select specific classes, roles (Teachers, Students, Parents), or individuals.
4. **Set Priority**
   Choose Normal for routine updates, Important for time-sensitive notices, or Urgent for critical communications that require immediate attention.
5. **Schedule or Publish**
   Click 'Publish Now' for immediate delivery, or choose 'Schedule' to set a future date and time for automatic publication.

Tip: Use 'Urgent' priority sparingly — it triggers prominent notifications and banners. Reserve it for genuinely critical messages like school closures or emergencies.

Managing Announcements

- Edit or update published announcements — recipients see the updated version
- Delete outdated announcements to keep the feed clean
- Pin important announcements to the top of the feed
- View read receipts to see which users have viewed the announcement
- Filter by priority, audience, or date range

Note: Pinned announcements stay at the top of the dashboard until manually unpinned, regardless of publication date.

39 Library

Manage the school library catalog, book lending, and return tracking.

Overview

The Library module provides a complete library management system for your school. Maintain a digital catalog of all books, manage borrowing and returns, track overdue items, and generate usage reports. Students and staff can browse available books from the library interface.

- Digital book catalog with categories and search
- ISBN-based book registration
- Borrowing and return tracking with due dates
- Overdue book alerts and notifications
- Student borrowing history
- Library usage statistics and reports

Managing the Catalog

1. **Navigate to Library**
   Click 'Library' in the sidebar. The library dashboard shows total books, available copies, books currently borrowed, and overdue items.
2. **Add a Book**
   Click 'Add Book'. Enter the title, author, ISBN, publisher, category (e.g., Science, Literature, History), and total number of copies.
3. **Set Book Details**
   Add optional information: publication year, edition, shelf location, and a brief description or summary.
4. **Save**
   The book is added to the catalog and becomes available for borrowing. Available copies count updates automatically.

Tip: Use the ISBN field to quickly identify books. Many barcode scanners can read ISBN barcodes directly into the form.

Lending and Returns

1. **Issue a Book**
   Click 'Issue Book'. Search and select the student or staff member, then select the book from the catalog. The system checks availability automatically.
2. **Set Due Date**
   Choose the return due date. The default lending period can be configured in Settings → Library.
3. **Confirm Issue**
   Click 'Issue'. The book's available copies decrease by one, and the borrowing record is created.
4. **Process Returns**
   When a book is returned, click 'Return' next to the borrowing record. The available copies increase and the record is marked as returned.

Warning: Books marked as overdue trigger notifications to the borrower. Configure the overdue grace period in Settings to avoid premature alerts.

Reports and Tracking

- Currently borrowed — list of all books currently checked out with borrower details
- Overdue books — items past their due date with the number of overdue days
- Popular books — most frequently borrowed titles
- Borrower history — complete borrowing record for any student or staff member
- Category breakdown — book distribution across categories

40 Dormitory

Manage hostel rooms, bed assignments, and dormitory rules for boarding students.

Overview

The Dormitory module handles all aspects of boarding student accommodation. Manage buildings, rooms, and beds, assign students to available spaces, and track occupancy. Ideal for boarding schools or institutions with student housing facilities.

- Building and floor management
- Room creation with capacity and type configuration
- Bed-level assignment for individual students
- Occupancy tracking with real-time availability
- Room type classification (Single, Double, Shared, Dormitory)
- Dormitory rules and regulations management

Setting Up Dormitories

1. **Navigate to Dormitory**
   Click 'Dormitory' in the sidebar. The dashboard shows total rooms, occupied beds, available spaces, and occupancy percentage.
2. **Add a Building/Hostel**
   Click 'Add Building'. Enter the building name (e.g., 'Boys Hostel A', 'Girls Dormitory'), location, and number of floors.
3. **Create Rooms**
   Select a building and click 'Add Room'. Enter the room number, floor, room type (Single, Double, Shared), and bed capacity.
4. **Configure Beds**
   Each room automatically generates bed slots based on capacity. You can label beds individually (e.g., 'Bed A', 'Bed B') for precise assignments.

Tip: Organize buildings by gender or grade level to simplify room assignments and enforce housing policies.

Assigning Students

1. **Open Room Assignments**
   Go to the 'Assignments' tab. Select a building and room to view available beds.
2. **Assign a Student**
   Click 'Assign Student' on an empty bed. Search for the student by name or admission number. Select and confirm the assignment.
3. **Transfer or Remove**
   To move a student, click 'Transfer' to reassign them to a different room or bed. Click 'Remove' to unassign them entirely.

Warning: Check the room's gender and grade restrictions before assigning students to prevent policy violations.

Dormitory Rules

Maintain and communicate boarding rules from the dormitory management interface:

- Create and publish dormitory rules visible to students and parents
- Categorize rules by type: General, Safety, Curfew, Visitor, Property
- Link rule violations to the Discipline module for incident tracking
- Print dormitory handbooks with all current rules and policies

Note: Dormitory rules are visible to parents through the Parent Portal, helping them stay informed about boarding policies.

41 Transport

Manage school bus routes, assign students to routes, and track driver information.

Overview

The Transport module manages your school's transportation system. Define bus routes with stops, assign students to routes, maintain driver and vehicle records, and track transport fee billing. It gives administrators a clear picture of who travels on which route and ensures safe, organized school transport.

- Route management with stops and pickup/drop-off times
- Vehicle fleet tracking with capacity and status
- Driver records with license and contact information
- Student-to-route assignments
- Transport fee integration with the Fees module
- Route occupancy and capacity reports

Setting Up Routes

1. **Navigate to Transport**
   Click 'Transport' in the sidebar. The dashboard shows total routes, active vehicles, students using transport, and route capacity utilization.
2. **Add a Route**
   Click 'Add Route'. Enter the route name (e.g., 'Route A - North District'), total distance, and estimated travel time.
3. **Define Stops**
   Add stops along the route with the stop name, pickup time, and drop-off time. Order the stops in the sequence the bus follows.
4. **Assign Vehicle**
   Link a vehicle to the route. Select from registered vehicles and enter the plate number, capacity, and vehicle type.
5. **Assign Driver**
   Assign a driver to the route. Enter or select the driver's name, phone number, and license details.

Tip: Keep route names descriptive with area or direction (e.g., 'Route 3 - East Side') so parents can easily identify the right route for their location.

Managing Student Assignments

1. **Open Route Details**
   Click any route to see its full details: stops, vehicle, driver, and assigned students.
2. **Add Students to Route**
   Click 'Add Student'. Search by name or class. Select the student and assign their designated stop for pickup and drop-off.
3. **Transfer Students**
   To change a student's route, click 'Transfer' on their row. Select the new route and stop.
4. **Remove from Route**
   Click 'Remove' to unassign a student from the transport service entirely.

Note: When a student is assigned to a route, the transport fee can be automatically added to their fee structure if configured in Settings → Fees.

Fleet and Driver Management

- Vehicle registry — maintain records for all school vehicles with plate numbers, capacity, and inspection dates
- Driver directory — contact details, license numbers, and assigned routes
- Vehicle maintenance reminders — set alerts for upcoming inspections or service dates
- Route capacity monitoring — see which routes are nearing full capacity

Warning: Keep vehicle inspection and driver license expiry dates up to date. The system can send reminders before these dates, but only if they are entered correctly.

42 Discipline Records

Log incidents, track student behavior, and manage disciplinary actions.

Overview

The Discipline module provides a structured system for recording and managing student behavioral incidents. Log infractions, assign appropriate consequences, track patterns over time, and communicate with parents — all while maintaining a fair and transparent disciplinary process.

- Incident logging with date, time, and description
- Severity levels: Minor, Moderate, Major, Critical
- Disciplinary action tracking (Warning, Detention, Suspension, Expulsion)
- Student behavioral history timeline
- Parent notification for recorded incidents
- Incident reports and behavioral trend analysis

Logging an Incident

1. **Navigate to Discipline**
   Click 'Discipline' in the sidebar. The dashboard shows recent incidents, open cases, and summary statistics.
2. **Click 'New Incident'**
   Select the student involved. If multiple students are involved, create separate incident records for each.
3. **Describe the Incident**
   Enter the incident date, time, location, and a detailed description of what occurred. Be factual and specific.
4. **Set Severity**
   Choose the severity level: Minor (e.g., dress code violation), Moderate (e.g., disruptive behavior), Major (e.g., fighting), or Critical (e.g., threats, dangerous behavior).
5. **Assign Disciplinary Action**
   Select the consequence: Verbal Warning, Written Warning, Detention, Suspension (with duration), or Escalation to administration. Add notes about the action taken.
6. **Save and Notify**
   Click 'Save'. Parents are automatically notified of the incident through the Parent Portal and via email if configured.

Warning: All discipline records are permanent and form part of the student's file. Ensure incident descriptions are accurate and objective before saving.

Tracking Student Behavior

Monitor behavioral patterns and intervene early with the tracking tools:

- Student discipline profile — complete history of all incidents for a specific student
- Behavioral timeline — visual representation of incidents over the academic year
- Repeat offender alerts — automatic flags for students with multiple incidents
- Category analysis — breakdown of incidents by type (tardiness, conduct, academic dishonesty, etc.)

Tip: Review the discipline dashboard weekly to identify students who may need counseling or additional support before issues escalate.

Reports and Communication

- Incident summary report — total incidents by severity, class, and period
- Class comparison — identify classes with higher incident rates
- Action summary — breakdown of disciplinary actions taken
- Parent communication log — record of all notifications sent to parents about incidents

Note: Parents can view their child's discipline record through the Parent Portal. Use the communication log to track all parent interactions regarding behavioral issues.

43 Parent Portal

How parents access their child's data through web and mobile.

Linking Parents

1. **Create Parent Account**
   Parents don't need traditional accounts. They use their child's Registration Number + Date of Birth to log in via the mobile app.
2. **Link to Student**
   When adding a student, enter the guardian's name, phone, and email. The system automatically creates the parent-student link.

Note: Parents access the portal through the Fiap Mobile app — no web login required.

What Parents Can See

- Child's profile and personal information
- Attendance records with present/absent/late history
- Fee balances and payment history
- Exam results and report cards
- School announcements and notifications

Mobile App Access

1. **Download Fiap Mobile**
   Install the Fiap Mobile app on Android.
2. **Select 'Parent Portal'**
   On the login screen, choose the Parent Portal option.
3. **Enter Credentials**
   Enter the child's Registration Number and Date of Birth (Year, Month, Day dropdowns).
4. **Access Dashboard**
   The parent dashboard shows attendance, fees, results, and child's profile.

44 SMS Settings

Configure the SMS gateway that sends fee reminders, absence alerts, and results notifications to parents.

What This Configures

SMS Settings connects your school to an SMS gateway (aggregator). Once configured, it powers every SMS feature in the platform: fee payment reminders, absence alerts, and the 'Notify parents' button on published results.

Note: This page only configures the gateway. To actually send fee reminders, use the 'Send fee reminders' button on the Fees page.

Configuring the Gateway

1. **Navigate to SMS Settings**
   Click 'SMS Settings' in the sidebar.
2. **Choose a Provider**
   Select MTN, Orange, Twilio, or Custom gateway from the Provider dropdown.
3. **Set the Sender ID**
   Enter the name recipients see as the sender. Most gateways cap this at 11 characters.
4. **Enter the API URL**
   Enter the gateway's HTTP send endpoint.
5. **Enter the API Key**
   Enter the gateway's API key. It is stored encrypted and the platform never displays it again, only a 'saved' indicator. Leave it blank on later edits to keep the existing key.
6. **Save**
   Click 'Save'. The status badge switches to 'Configured' once a provider is set.

Warning: Only Owner and Admin roles (settings:update permission) can view and save these settings.

45 EMIS Census

Generate the enrolment and staffing census returns education ministries require.

Overview

EMIS Census is a read-only ministry-facing report. It rolls the school's individual student and staff records up into the aggregate counts ministries expect: enrolment by class, section, sub-system, and gender, staff totals by gender, and — once a school year is selected — promotion and repetition rates.

- Live-roster view by default, or select a past School Year to source enrolment from that year's saved records
- Total Enrolment, Total Staff, Promotion Rate, and Repetition Rate stat cards
- Promoted / Repeated / Graduated / Total flow breakdown once a school year is selected
- Enrolment-by-class table: level, section, sub-system, male/female/other, and total, searchable
- Roll-up cards: enrolment by sub-system, by section, staff by gender, and unassigned students
- One-click Excel export of the whole census

Generating a Census

1. **Navigate to EMIS Census**
   Click 'EMIS Census' in the sidebar.
2. **Choose the Scope**
   Leave 'Live Roster' selected to use current enrolment, or pick a specific School Year to pull that year's saved Enrolment records — this also unlocks the promotion/repetition flow stats.
3. **Review the Stat Cards & Tables**
   Totals, gender split, and the class-by-class breakdown load automatically for the chosen scope.
4. **Export to Excel**
   Click 'Export Excel' to download school-census.xlsx with the same figures.

Note: The 'Data Source' pill under the header shows whether the numbers come from the live student roster, a saved year's Enrolment table, or a fallback — check it before submitting a return.

46 Official Exam Register

Prepare official exam candidate lists and pass-rate conformance reports for national exam boards.

Overview

Built for Cameroon's official exams (CEP, FSLC, BEPC, GCE O/A Level, Probatoire, Baccalauréat), this is a read-only, two-tab register: Candidates lists the official candidate register with the identity fields an exam board return needs, and Conformance reports aggregate pass rates.

- Candidates tab: Student ID, Matricule, Learner ID, Name, Date of Birth, Sex, and Class, with total and by-sex summary cards
- Conformance tab: overall Sat / Passed / Failed / Pass Rate, a per-subject pass/fail breakdown, and a by-sex pass-rate breakdown
- Shared filters: Class and Term; Conformance adds Exam Type and Pass Mark
- Excel export for either tab, respecting the currently applied filters

Building the Candidate Register

1. **Navigate to Official Exam Register**
   Click 'Official Exam Register' in the sidebar. It opens on the Candidates tab.
2. **Filter by Class and/or Term**
   Both are optional — leave them blank to include every class.
3. **Review the Register**
   One row per active student, with the identity fields an exam board return needs, plus a total and male/female/other summary.
4. **Export Excel**
   Downloads exam-candidate-register.xlsx with the current filters applied.

Checking Pass-Rate Conformance

1. **Switch to the Conformance Tab**
   Switch tabs at the top of the page.
2. **Set the Filters**
   Class, Term, and Exam Type are optional; Pass Mark defaults to 50.
3. **Review Overall Stats**
   Sat, Passed, Failed, and the overall Pass Rate.
4. **Review by Subject**
   A table of sat/passed/failed counts and pass rate for each subject.
5. **Review by Sex**
   Pass rate and sat/passed/failed counts broken down by Male, Female, and Other.
6. **Export Excel**
   Downloads exam-conformance-report.xlsx with the current filters applied.

Warning: This page requires the academics:view permission. Teaching staff without academic-reporting access won't see it in the sidebar.

47 Inspectorate Reports

Give school inspectors and education authorities an oversight view of every branch.

Overview

Inspectorate Reports is a read-only oversight page. Since one tenant can own many physical school branches, it gives inspectors a per-branch scorecard alongside a national roll-up, plus a government-facing staff census.

- National stat cards: Total Students, Total Teachers, Student:Teacher Ratio
- Per-branch scorecard table: Branch, Students, Teachers, Ratio — searchable by branch name
- Staff census: Total Staff, staff with/without a government matricule number
- Staff-by-gender table
- Staff-by-employment-type table: Permanent, Contract, Temporary, Volunteer, Part-Time
- Optional School Year selector to source branch student counts from a past year's Enrolment records instead of the live roster

Reviewing Branch Scorecards

1. **Navigate to Inspectorate**
   Click 'Inspectorate' in the sidebar.
2. **Choose the Scope**
   'Live Roster' for current counts, or a past School Year for that year's saved Enrolment figures.
3. **Read the National Cards**
   Total students, teachers, and the student:teacher ratio across every branch combined.
4. **Search the Branch Table**
   Find a specific school and compare its ratio to the national average.

Reviewing the Staff Census

1. **Scroll to Staff Census**
   Below the branch scorecards.
2. **Read the Coverage Cards**
   Total Staff, and how many have a government matricule number recorded versus how many don't.
3. **Check the Gender & Employment-Type Tables**
   A breakdown of staff composition by gender and by employment type.

Note: This page requires the inspection:view permission — it's meant for inspector and education-authority accounts, not regular teaching staff.