CoreAxis School ERP

User Manual

Every module, step by step, for the Admin, Principal, Accountant, Teacher and Student / Parent logins. Web edition, October 2026.

Worked example: Demo Public School

14, Boring Road, Patna · Play Group to Class VIII · Session 2026-27

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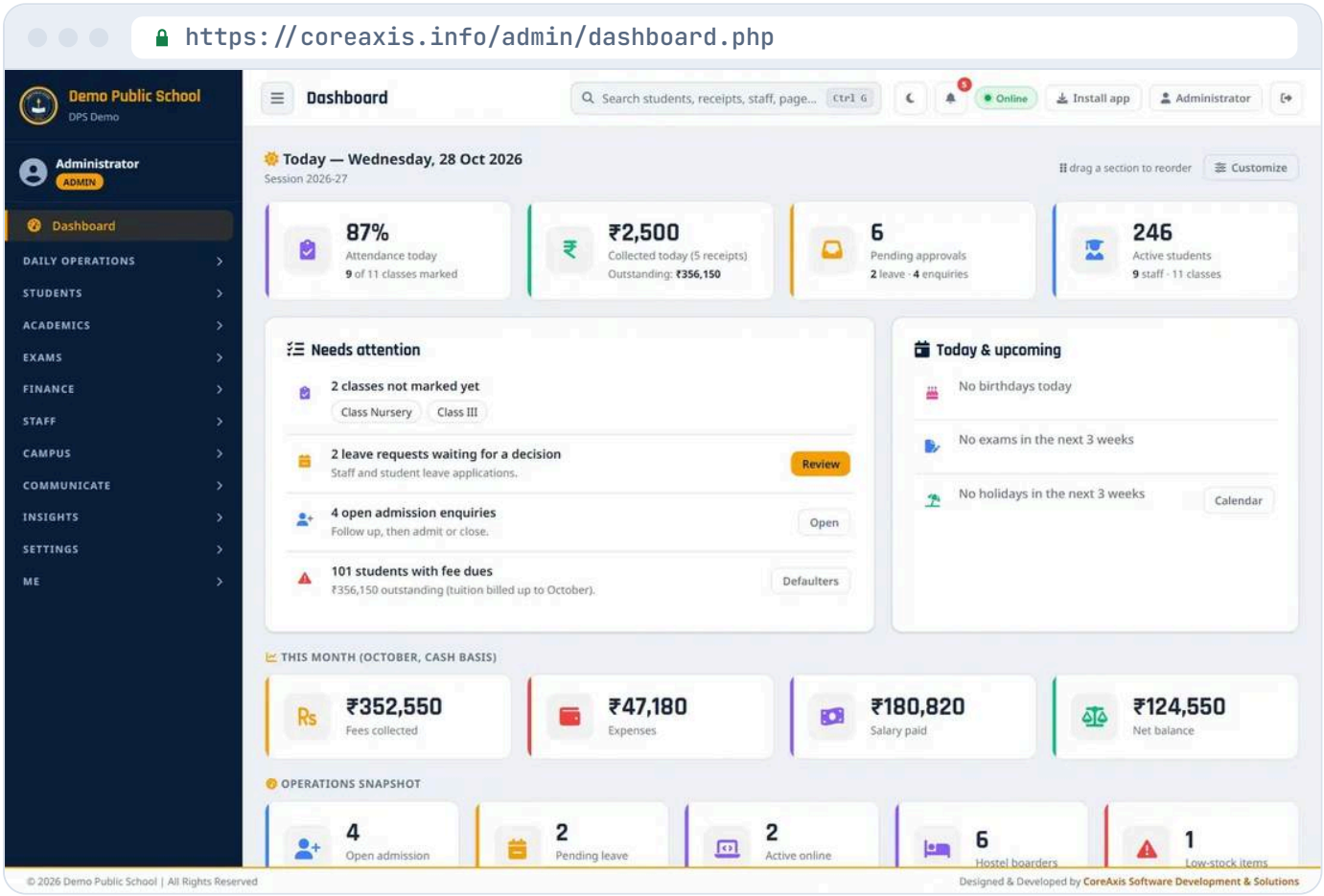
GETTING STARTED · CHAPTER 1

About this manual

Everyone

CoreAxis School ERP runs a school's daily work in one place: admissions, attendance, fees, exams, staff, payroll, library, transport, hostel, notices and the parents' portal. It works in any browser at https://coreaxis.info, and the same data is available in the School eRegister mobile app. This manual shows every web screen, with worked examples from the Demo Public School.



The Admin dashboard of the Demo Public School on a normal school day.

Who uses which login

Each person signs in with their own account. What they see depends on their role; a menu item that a role cannot use is not shown.

Admin / Principal	The whole school: students, academics, exams, finance, staff, campus, communication, reports and settings. Only Admin / Principal can approve concessions, approve leave, issue TCs and change school settings. Demo school: **Satyajeet Kr. Singh** (Principal) and the **Administrator** account.
Accountant	The fee desk and everything about money: fee dues, concessions (request), cheques, UPI / bank claims, fee structure, expenses, School Store, payroll, the finance ledger and reports. Demo school: **Rakesh Agarwal**.
Teacher	Their own classes and subjects: attendance, marks, homework, timetable, notices, report cards, ID / admit cards, Library Desk and competitions, plus their own leave, attendance and payslips. Demo school: **Amit Kumar Mishra**, class teacher of Class VI-A.
Student / Parent	The portal: fees and receipts, paying online or by UPI / bank transfer, attendance, results and report cards, online exams, homework, notices and leave requests. Parents sign in with the child's admission number and date of birth, and can add a second child.

The example school

Every screenshot comes from the **Demo Public School**, 14 Boring Road, Patna: Play Group to Class VIII, one section per class, about 250 students, nine staff, session 2026-27. Names, phone numbers and amounts are sample data. Your school's screens look the same, with your own name, logo and data.

How to read the steps

Bold words	A **bold** word is a button, tab, menu item or field label, written exactly as on the screen.
Menu	Under each chapter title, **Menu** shows where to click in the left sidebar, for example *Finance › Cheques / DD*. On a phone, open the sidebar with the menu button at the top left.
Address bar	Each screenshot shows the page address, for example https://coreaxis.info/admin/fees.php. You can type the address to go straight to a page after signing in.

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Saffron boxes	A saffron outline in a screenshot marks the control the step asks you to use.
Confirmation popups	Every action that saves, changes or deletes something first asks **Are you sure?** in a popup. Deleting asks twice. Read the popup, then click the coloured button to go ahead, or **Cancel**.
Search anywhere	Press **Ctrl + G** (or click the search box at the top) to find a student, receipt, staff member or page by typing part of its name.

Before you start

Use a current version of Chrome, Edge, Firefox or Safari. The first time you sign in on a computer or phone, the system sends a 6-digit code to your email; tick **Trust this browser** so that you are not asked again for 30 days on that device. Keep your password private: the school office can reset it, but no one from CoreAxis or the school will ever ask you for it.

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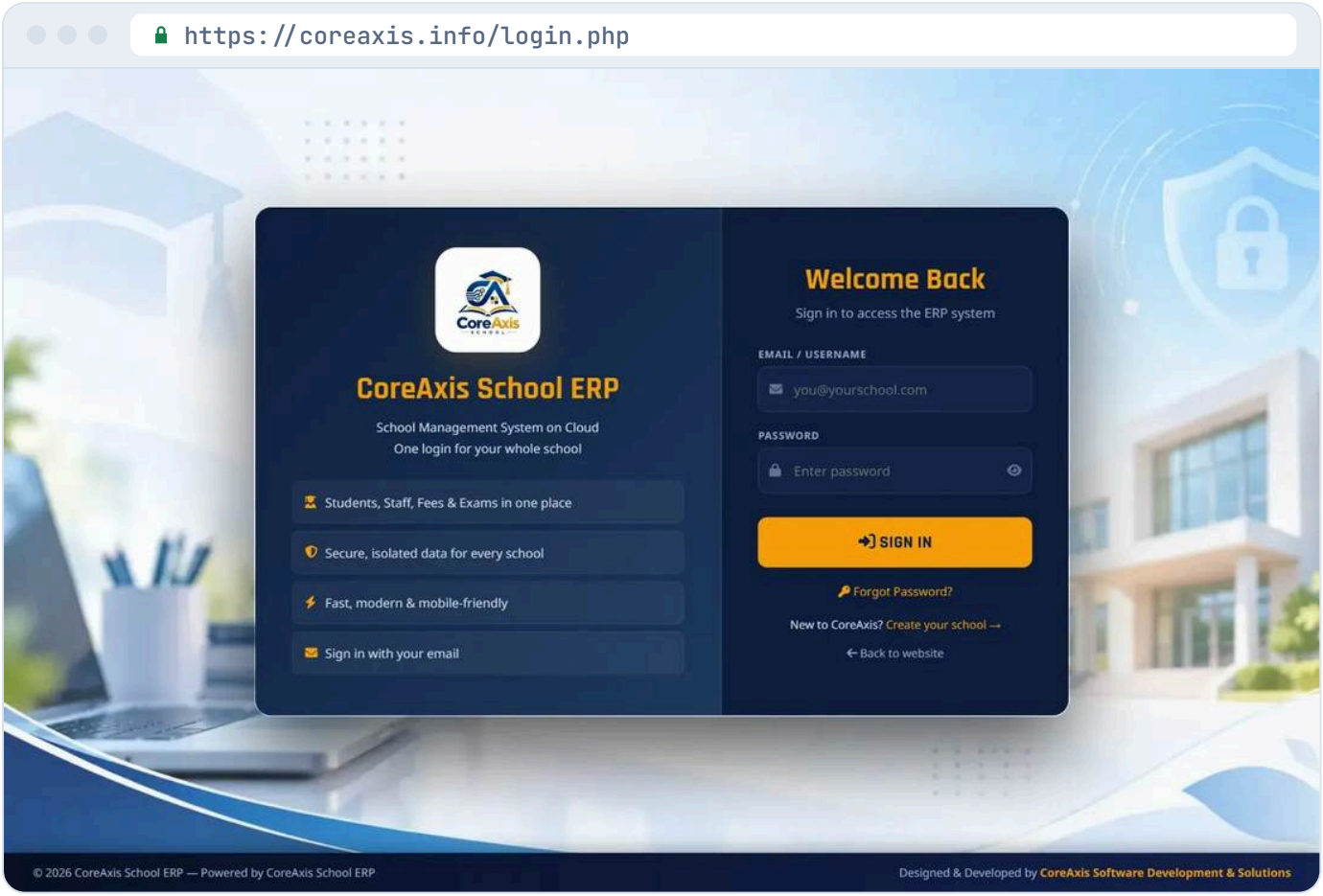
GETTING STARTED · CHAPTER 2

Signing in

Admin | Principal | Accountant | Teacher | Student / Parent

MENU School website › Login (staff) · Student Portal (students and parents)

Every school user signs in through one of two doors. Staff (Admin, Principal, Accountant, Teacher) use the staff login with their email and password; on a new browser they also enter a 6-digit code sent to their email. Students and parents use the Student Portal with the admission number and date of birth. After signing in, each person sees only the menus of their own role.



Signing in — Demo Public School

Demo school logins

The Demo Public School has one staff account for each role. Passwords are not printed in this manual; the school office gives each person their own password.

Admin — Administrator	admin@demo.coreaxis.info · password •••••••• · full access to every menu, including Settings.
Principal — Satyajeet Kr. Singh	satyajeet.singh@demo.coreaxis.info · password •••••••• · same menus as Admin; approves TC / SLC requests, leaves and concessions.
Accountant — Rakesh Agarwal	rakesh.agarwal@demo.coreaxis.info · password •••••••• · Fee Desk, Fee Dues, Concessions, Cheques / DD, Expenses, Payroll, Finance Ledger, Reports, TC / Certificates requests.
Teacher — Amit Kumar Mishra	amit.mishra@demo.coreaxis.info · password •••••••• · own class attendance, marks, homework, timetable, notices, ID / admit cards.
Student / Parent — Aarav Sharma	Student Portal · admission number DEMO20260001 · date of birth 01-01-2015 (no password).

Sign in as staff (example: Principal Satyajeet

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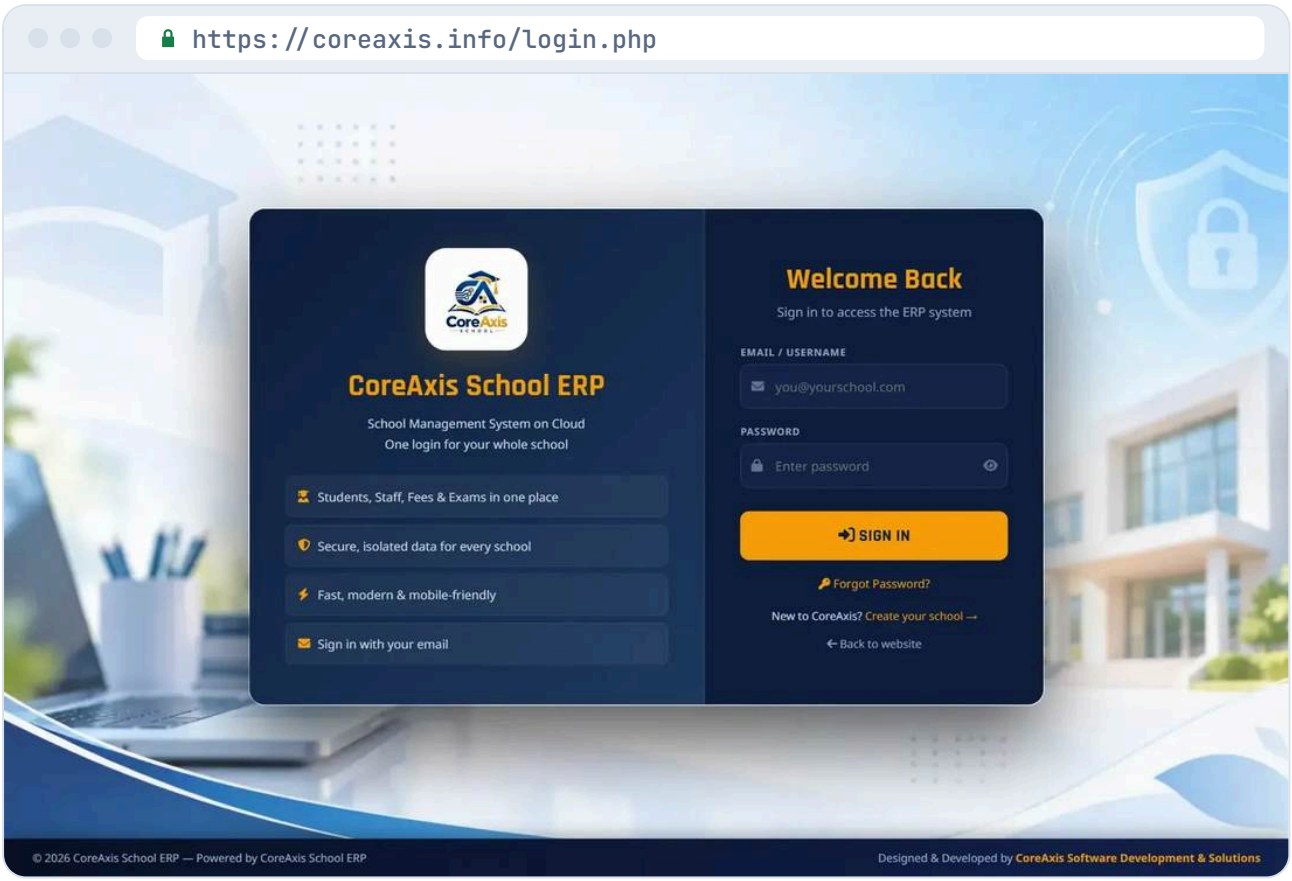
Kr. Singh, first time on a new computer)

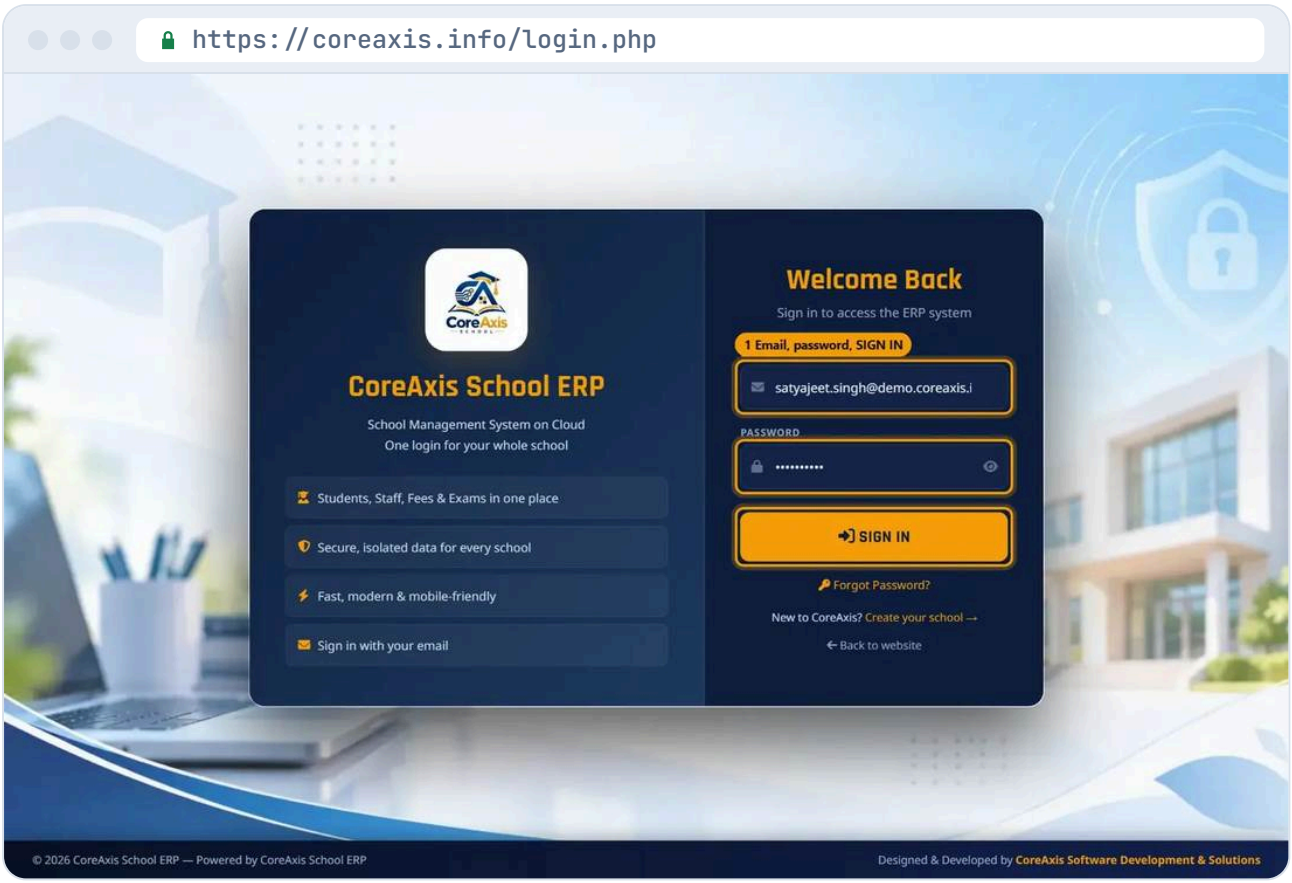
1. Open your school's address in the browser and click **Login**. The **Welcome Back** screen opens.



The staff login screen.

2. Type your email in **Email / Username**, for example satyajeet.singh@demo.coreaxis.info. A username also works.

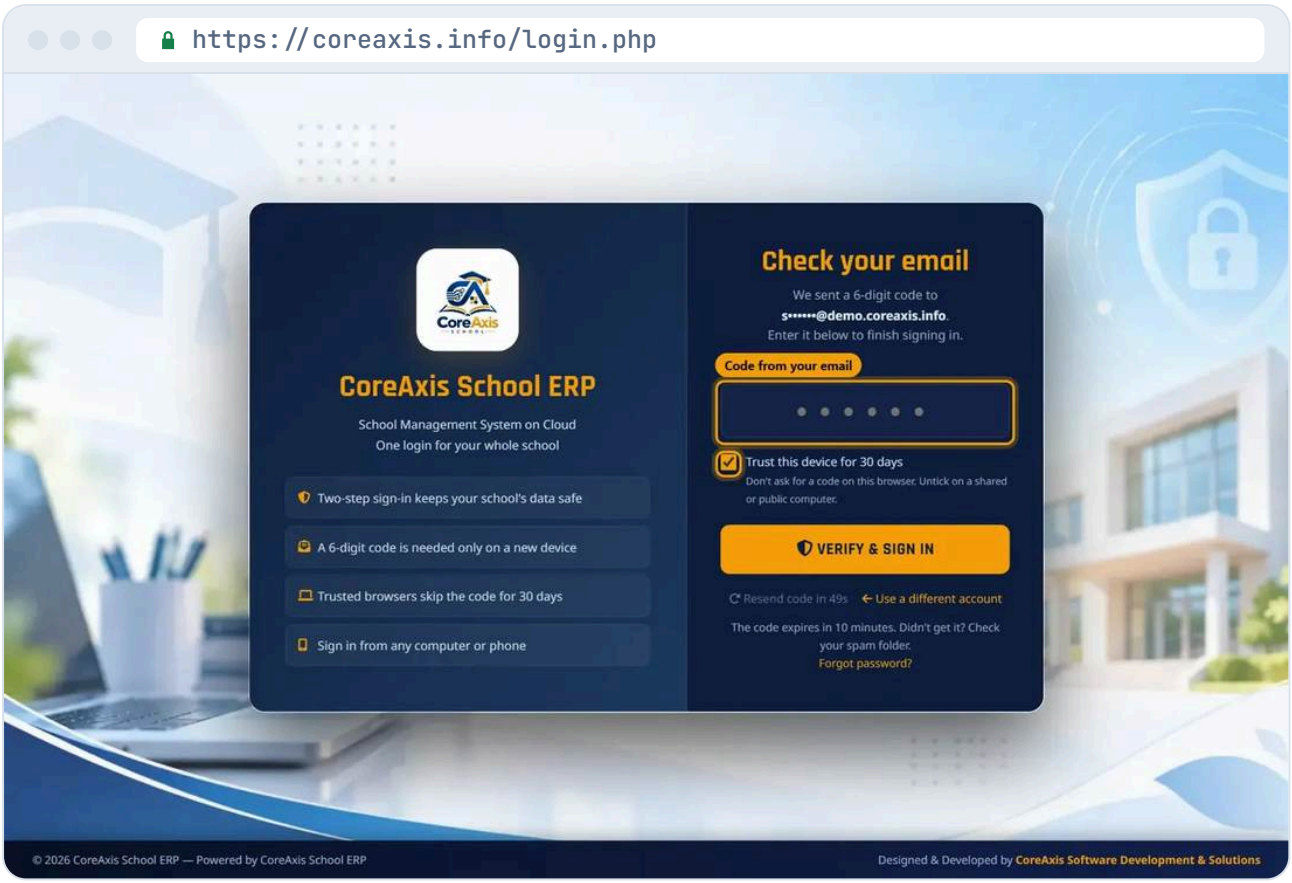
3 Type your password in **Password**. Click the eye icon if you want to check what you typed.



Email and password filled in; the password stays hidden as dots.

4 Click **SIGN IN**.

5 On a new browser the **Check your email** screen opens. Open your email and find the 6-digit code from the school.



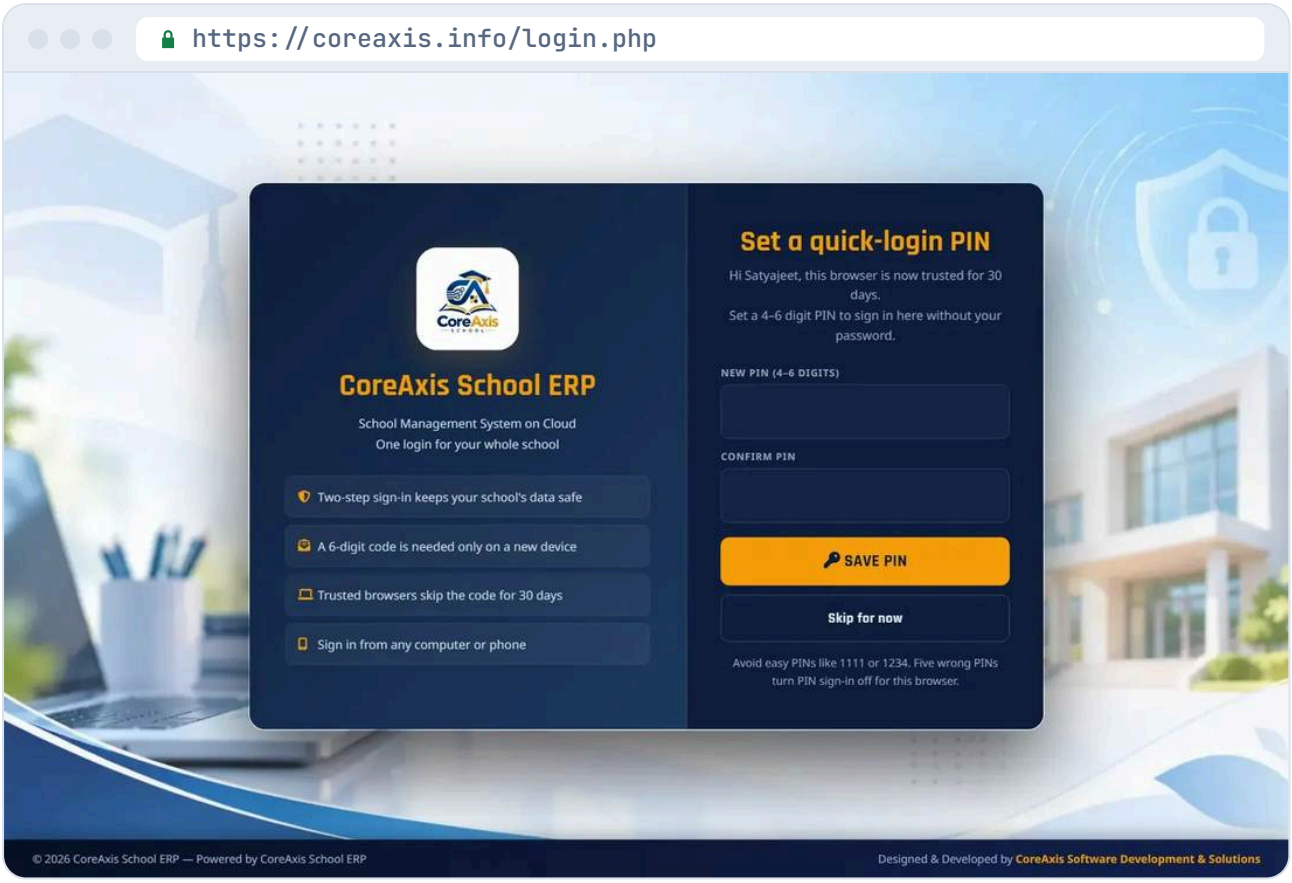
The code is sent to the email shown on screen (partly hidden).

6 Type the code in the code box.

7 Leave **Trust this device for 30 days** ticked on your own computer. Untick it on a shared or public computer.

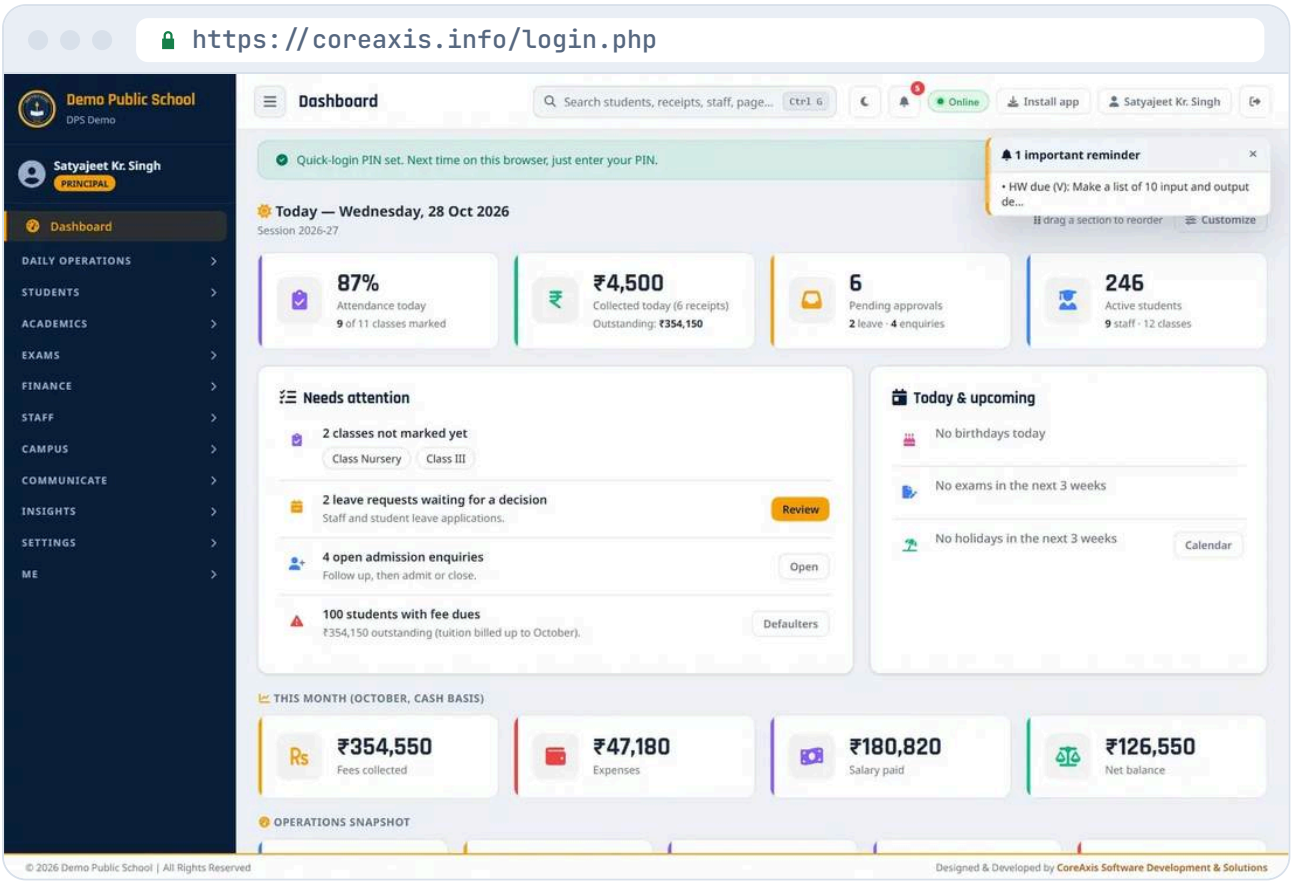
8 Click **VERIFY & SIGN IN**.

9 The **Set a quick-login PIN** screen opens. Type a 4–6 digit PIN in **New PIN** and again in **Confirm PIN**, then click **SAVE PIN**. Click **Skip for now** if you do not want a PIN.



A PIN lets you sign in on this trusted browser without typing the password.

10 Your dashboard opens. The top bar shows your name and the sidebar shows the menus of your role.



Signed in as the Principal.

TIP The code expires in 10 minutes. If it does not arrive, check the spam folder, then click **Resend code** (it becomes active after a short wait). **Send code by SMS instead** appears when the school has SMS turned on.

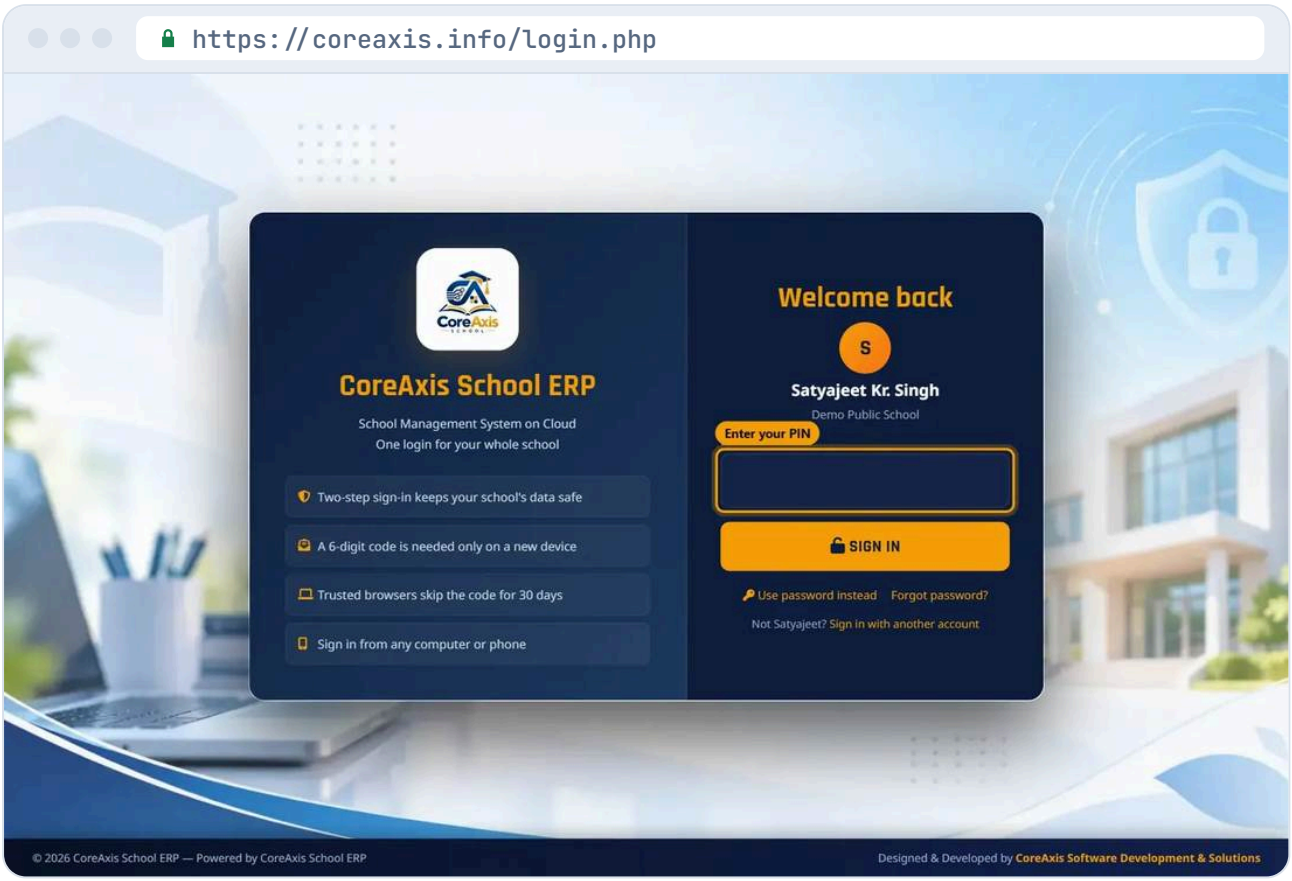
TIP A trusted browser does not ask for a code again for 30 days, unless your password is changed.

TIP Click **Use a different account** on the code screen to go back and sign in as someone else.

IMPORTANT After 6 wrong passwords for one account (or 10 from one computer) in 15 minutes, sign-in is locked for 15 minutes.

Sign in with your PIN (example: Satyajeet Kr. Singh on his trusted computer)

1. Open the school login page on the computer where you set the PIN. The **Welcome back** screen shows your name and school.



PIN sign-in on a trusted browser.

2. Type your PIN in **Enter your PIN**. When all digits are typed the screen signs you in; you can also click **SIGN IN**.

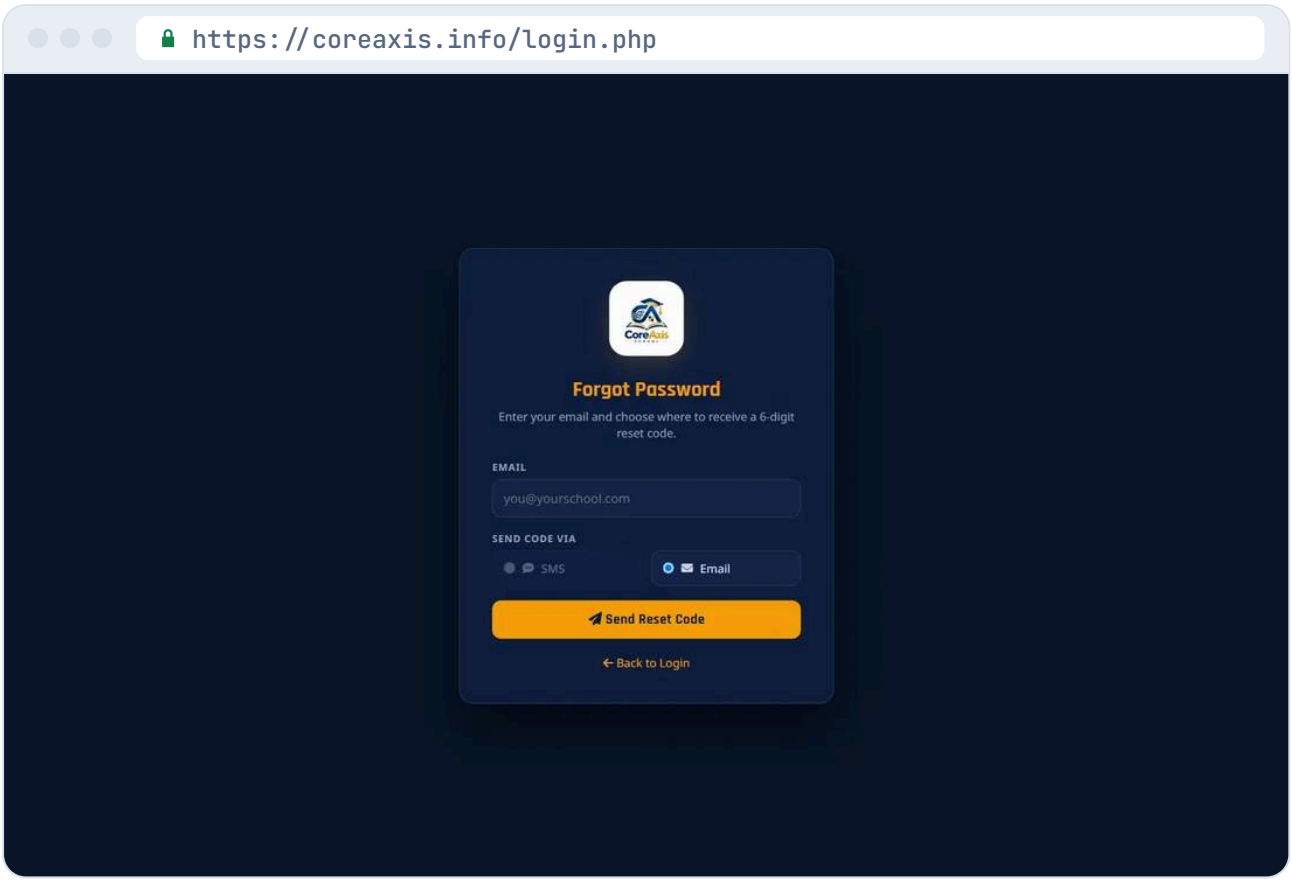
3. To use the password instead, click **Use password instead**. To sign in as another person, click **Sign in with another account**.

TIP Avoid easy PINs like 1111 or 1234.

IMPORTANT Five wrong PINs turn PIN sign-in off for that browser. You then sign in with email, password and a new code.

Forgot your password

1. On the login screen click **Forgot Password?**. The **Forgot Password** screen opens.



The Forgot Password screen.

2. Type your email in **Email**.
3. Under **Send code via**, choose **SMS** or **Email** (only the options your school has turned on can be chosen).
4. Click **Send Reset Code**. Then type the 6-digit code you receive and your new password on the next screen.

TIP If online reset is not available, the screen says so. Ask the school Admin to reset your password.

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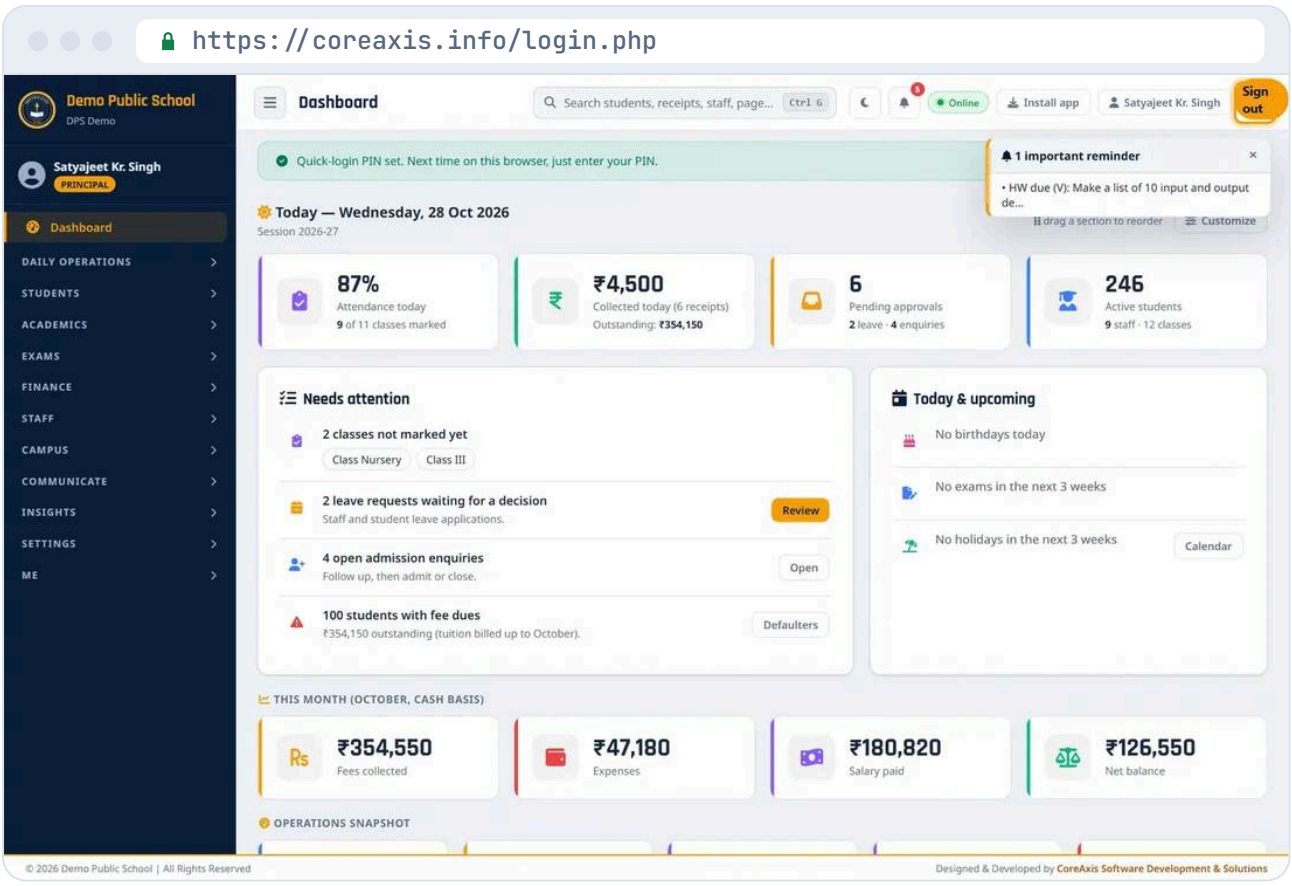
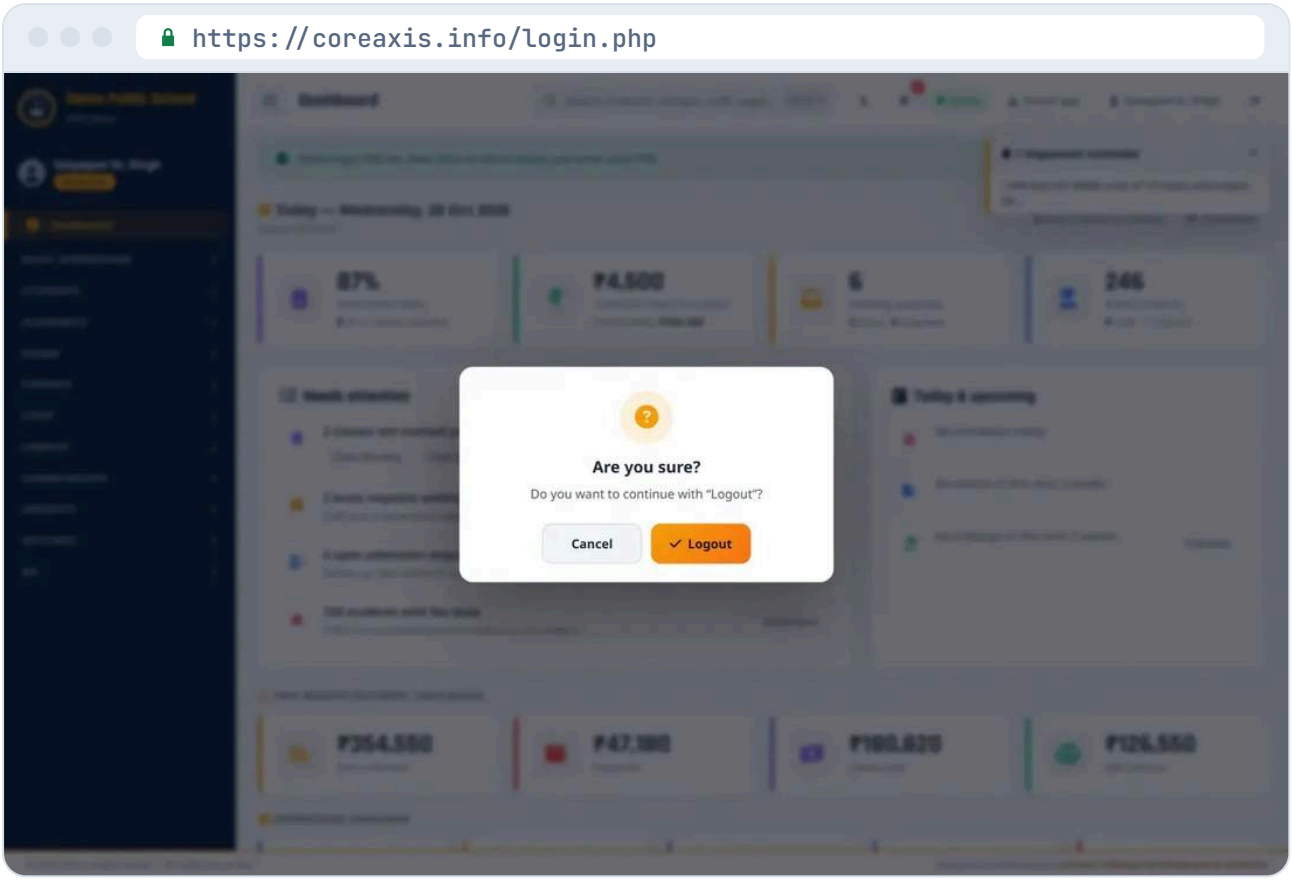
Sign out

1 Click the **Logout** icon at the right end of the top bar.



The Logout icon is next to your name.

2 In the **Are you sure?** popup click **Logout**. Click **Cancel** to stay signed in.



Sign-out asks once for confirmation.

3 The login screen opens. On a trusted browser with a PIN it shows the PIN screen for your next sign-in.

TIP Always sign out on a shared computer. Copies of pages saved for offline use are cleared from the browser when you sign out.

Student / Parent portal sign-in (example: Aarav Sharma, Class VI-A)

Students and parents do not need a password. They use the admission number printed on the ID card or fee receipt and the date of birth in school records.

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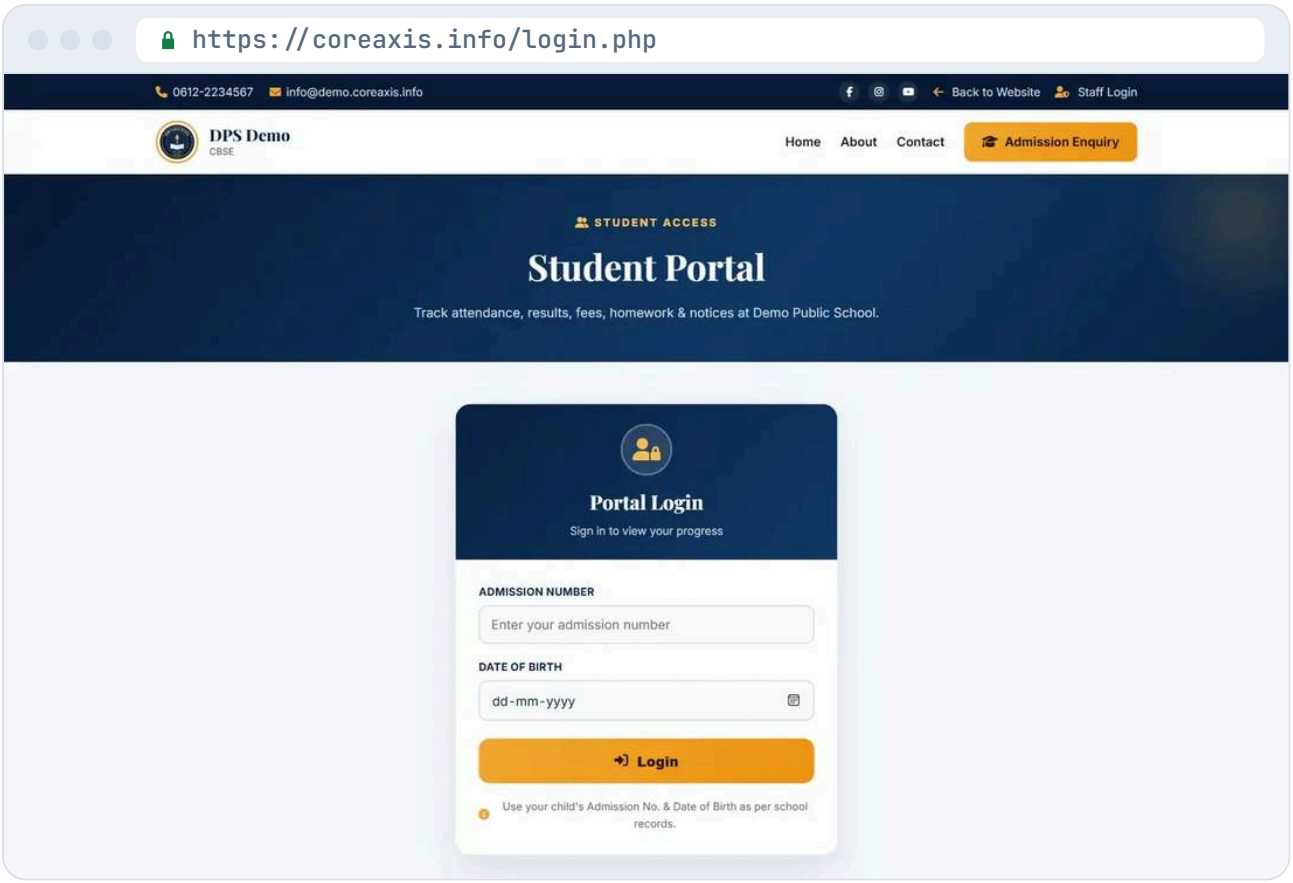
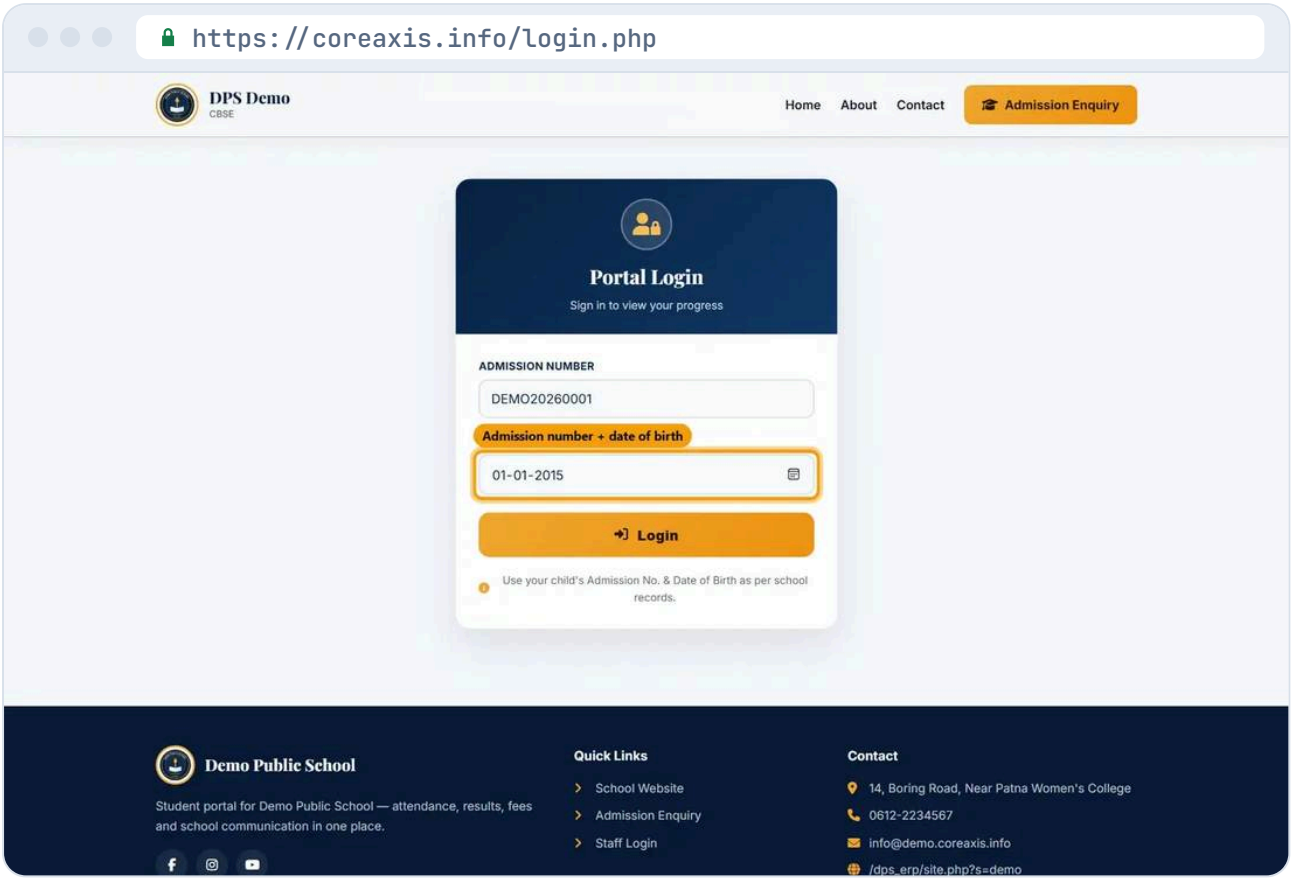
1 Open the school's **Student Portal** link (for the demo school: portal.php?tenant=demo).



The Student Portal sign-in screen.

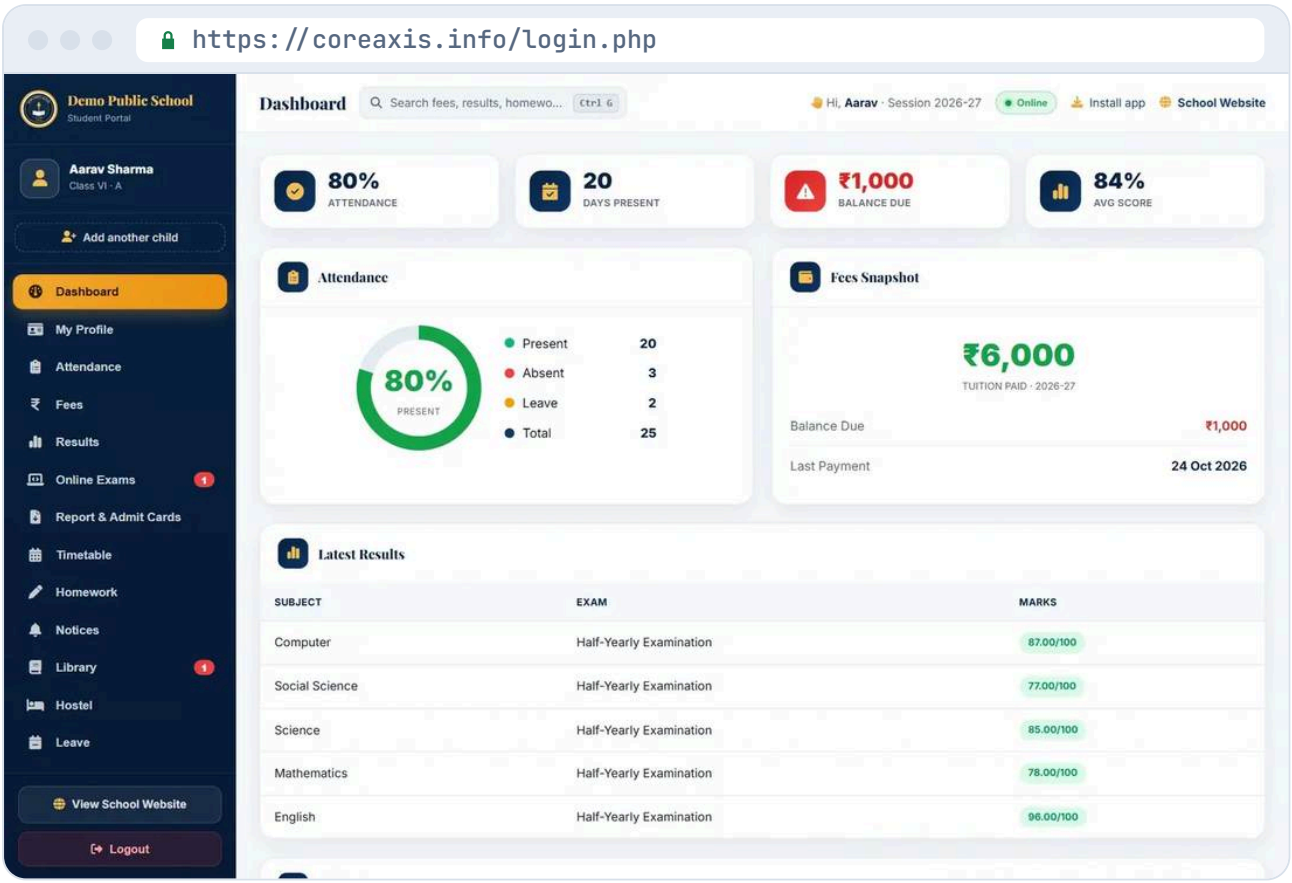
2 Type the **Admission Number**, for example DEMO20260001.

3 Pick the **Date of Birth**, for example 01-01-2015.



Admission number and date of birth filled in.

4 Click **Login**. The student's **Dashboard** opens with attendance, fees and latest results.



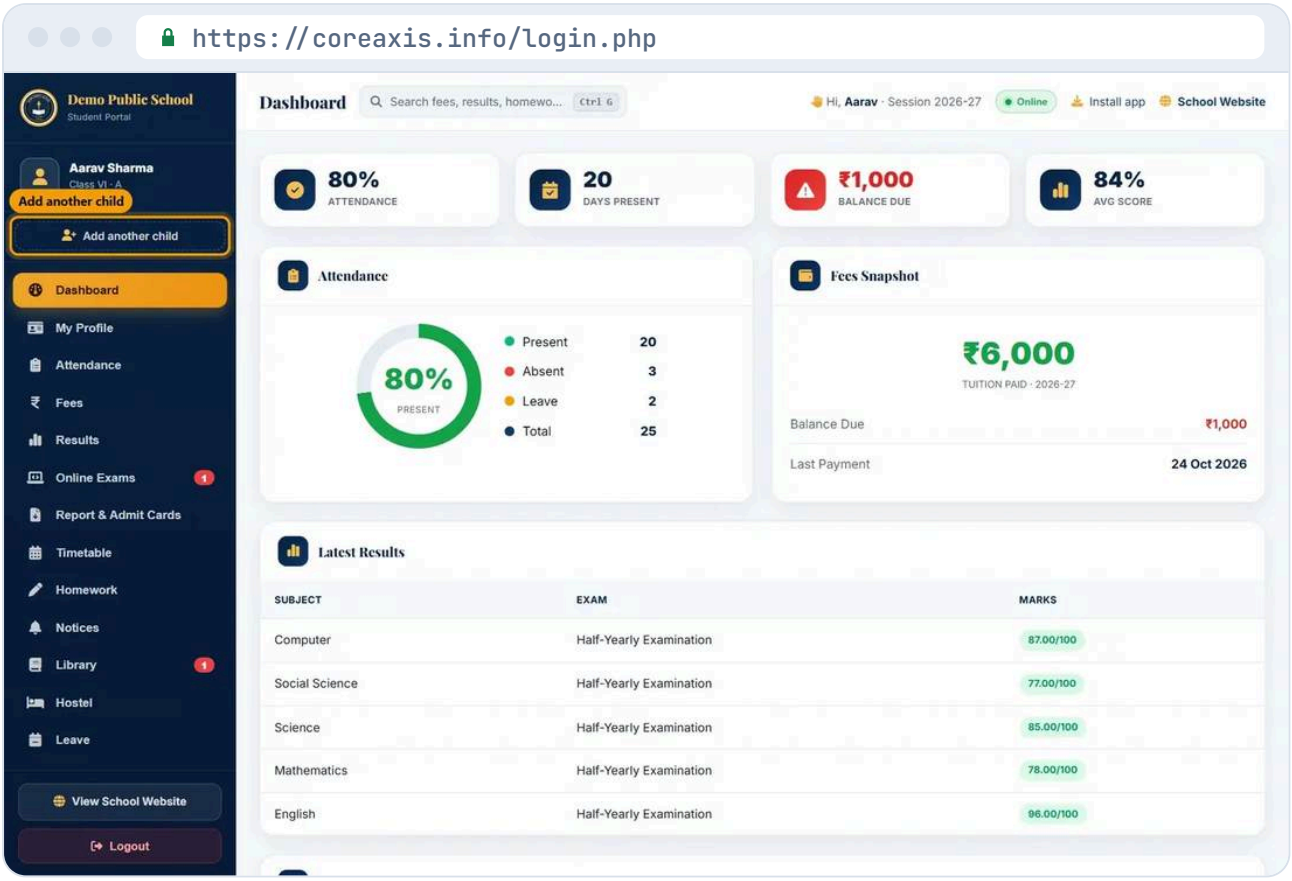
Aarav Sharma's portal dashboard.

TIP If sign-in fails, check the date of birth with the school office. A student who has left the school cannot sign in.

Add and switch a second child (example: Kabir Sharma, Class V-A, brother of Aarav)

A parent with more than one child in the school can see all of them in one sign-in. Each child is verified with their own admission number and date of birth.

1 In the portal sidebar click **Add another child**.



Add another child sits under the child's name.

2 Type the other child's **Admission Number**, for example DEMO20260021.

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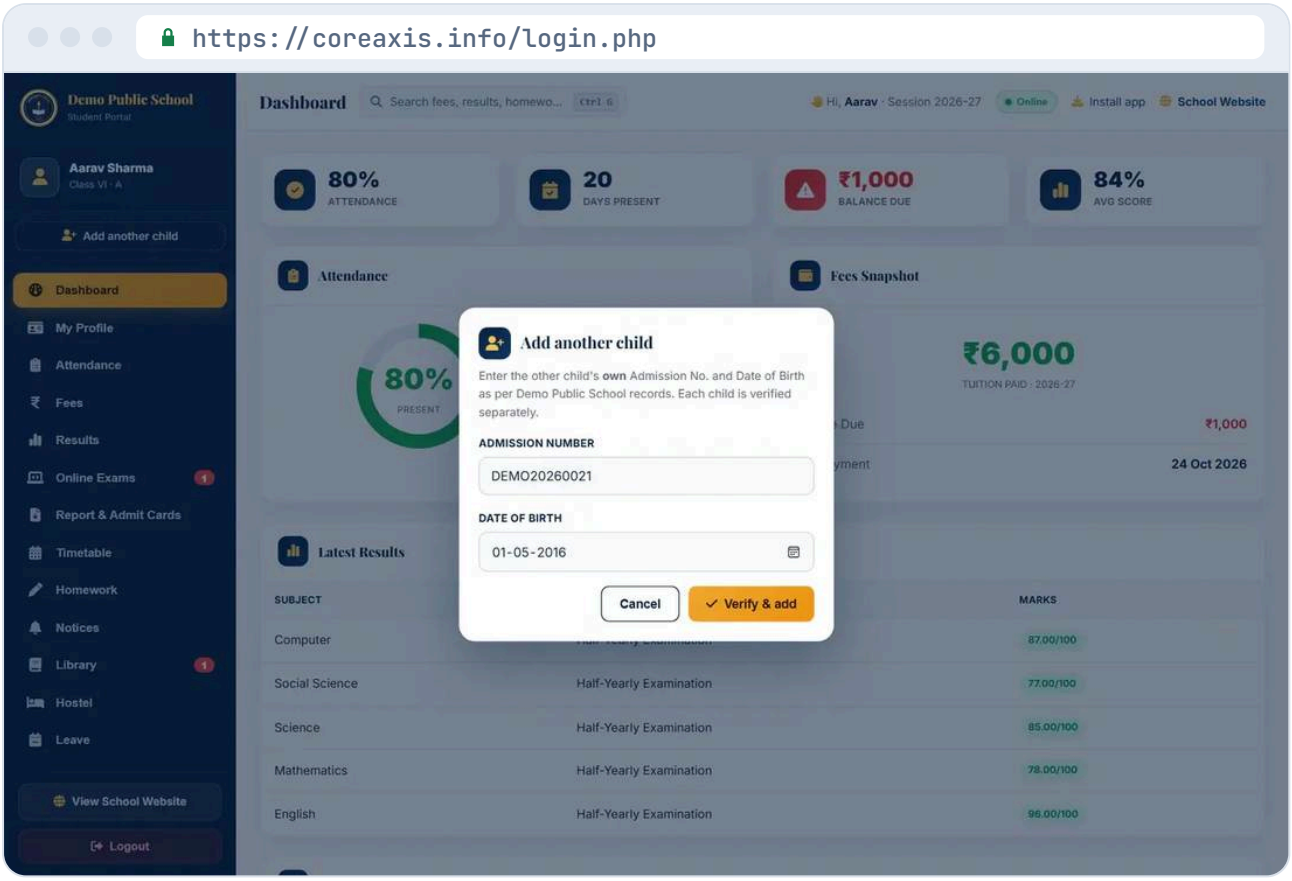
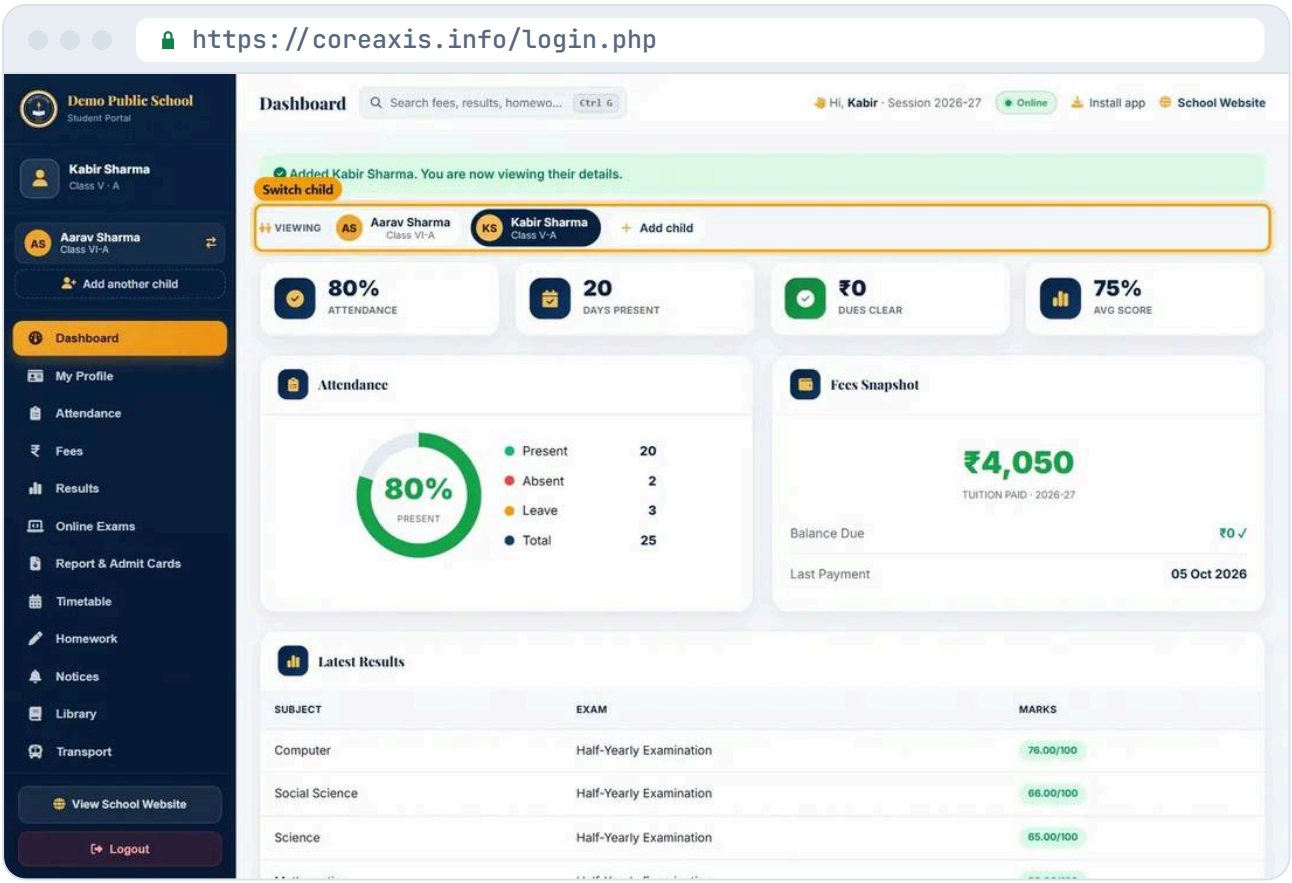
3 Pick the other child's **Date of Birth**, for example 01-05-2016.



Each child is verified separately.

4 Click **Verify & add**. The portal now shows Kabir's details and a message confirms he was added.

5 To switch, click the other child's name in the **Viewing** strip at the top, or in the sidebar.



The Viewing strip shows both children; the dark one is open now.

6 To add another child, click **Add child** in the strip.

TIP The children are remembered only for this sign-in. After signing out, sign in again and add the other child again.

Questions

I did not get the 6-digit code.

Wait a minute and check the spam folder. Then click Resend code. A code can be requested about once a minute and only a few times in 15 minutes. Check with the Admin that your email in My Profile is correct.

Can I sign in on my phone?

Yes. The same login works in a phone browser. You can also click Install app in the top bar to add CoreAxis to the home screen.

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Why does a driver or peon account not sign in?

Roles such as driver, peon, guard, nurse and housekeeping are staff records only. They have no ERP access and the login screen says so.

I see 'Your session expired for security'.

You were inactive for a long time and were signed out. Sign in again; on a trusted browser no code is needed.

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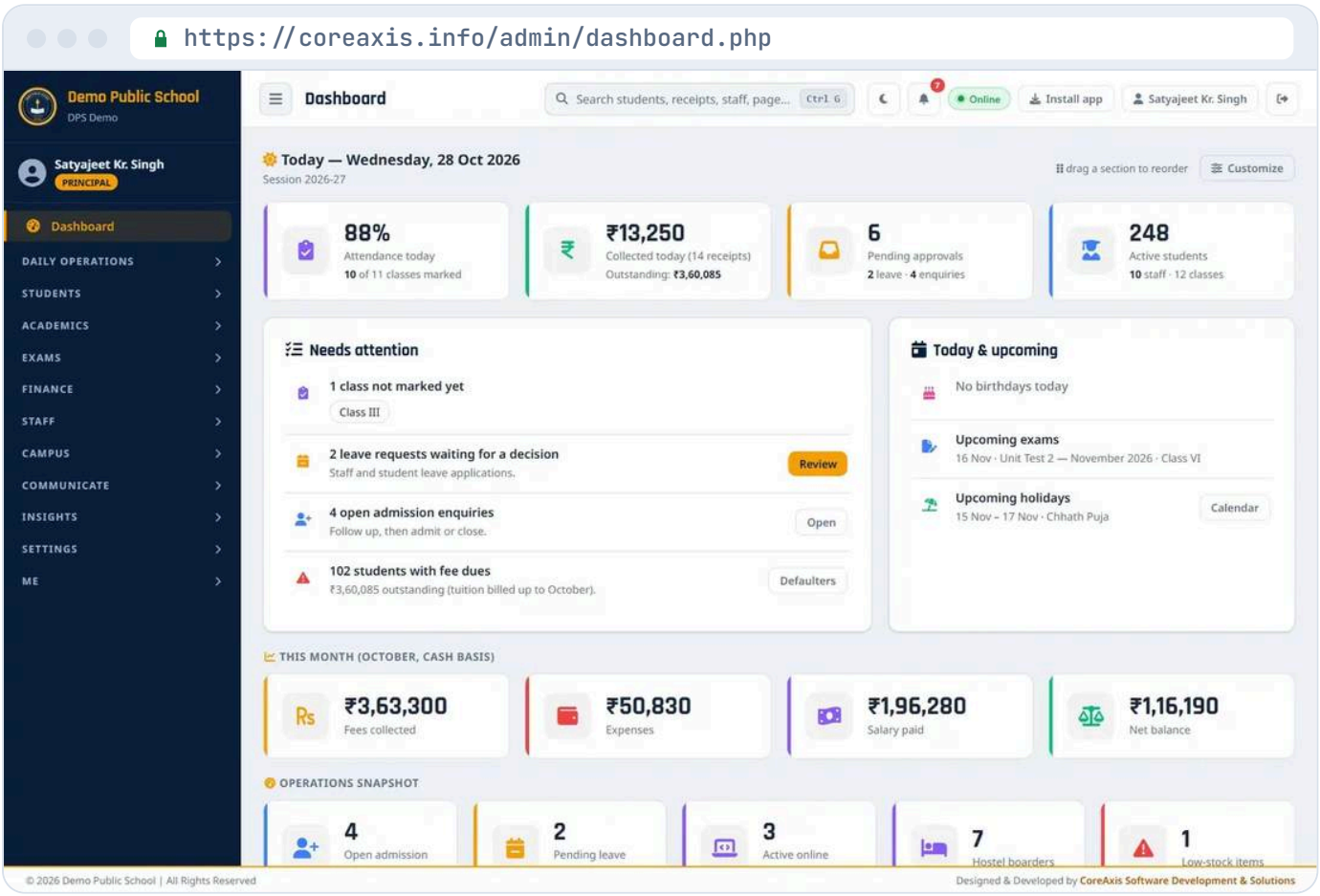
GETTING STARTED · CHAPTER 3

Dashboard

Admin | Principal | Accountant | Teacher

MENU Dashboard (Accountant and Teacher: Today)

The Dashboard is the first screen an Admin or Principal sees after signing in. It answers three questions: what happened today, what is waiting for a decision, and how the month is going. Every card is a link to the page where you act on it. Accountants and Teachers get their own Today screen with the work of their role.

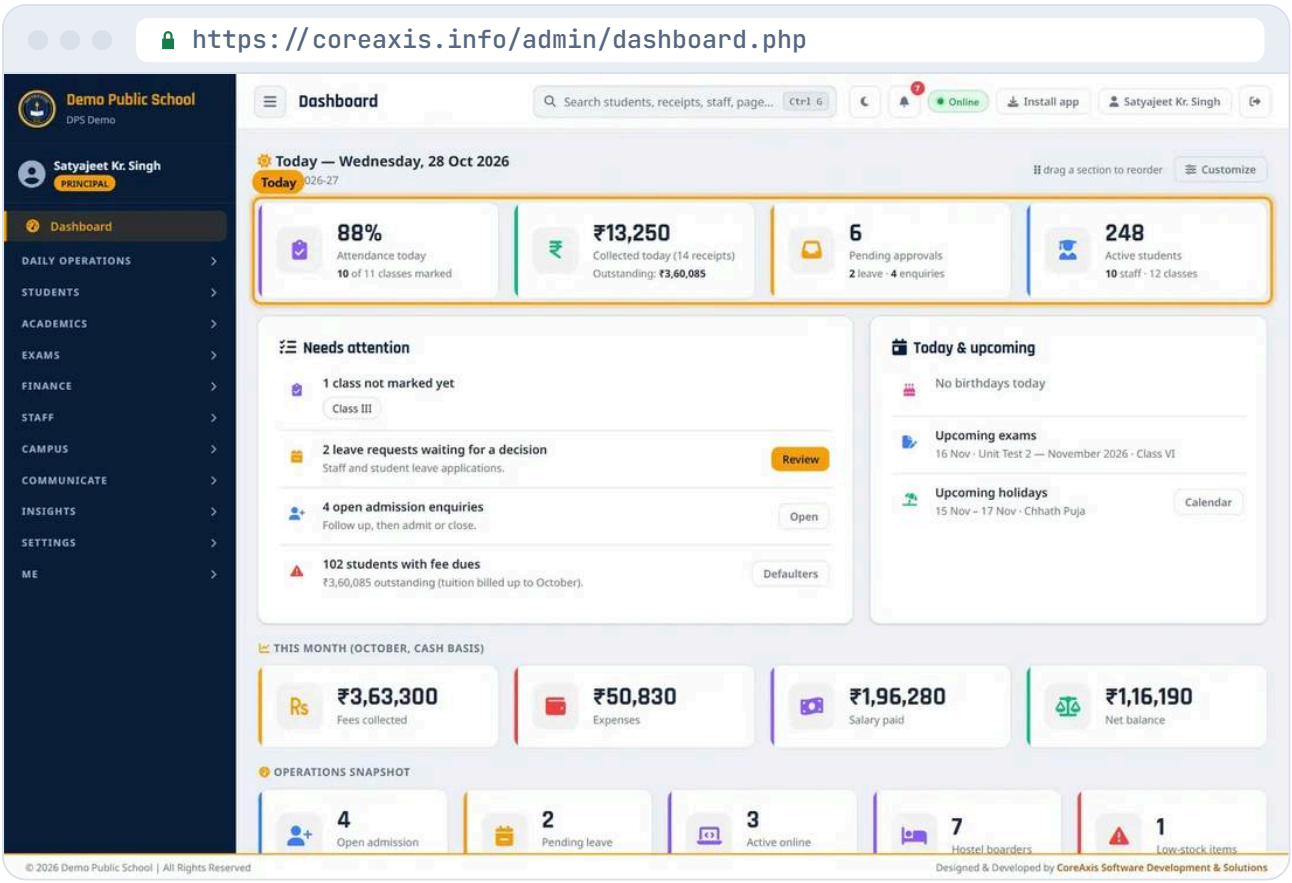


Dashboard — Demo Public School

Read today's figures (example: Wednesday, 28 Oct 2026)

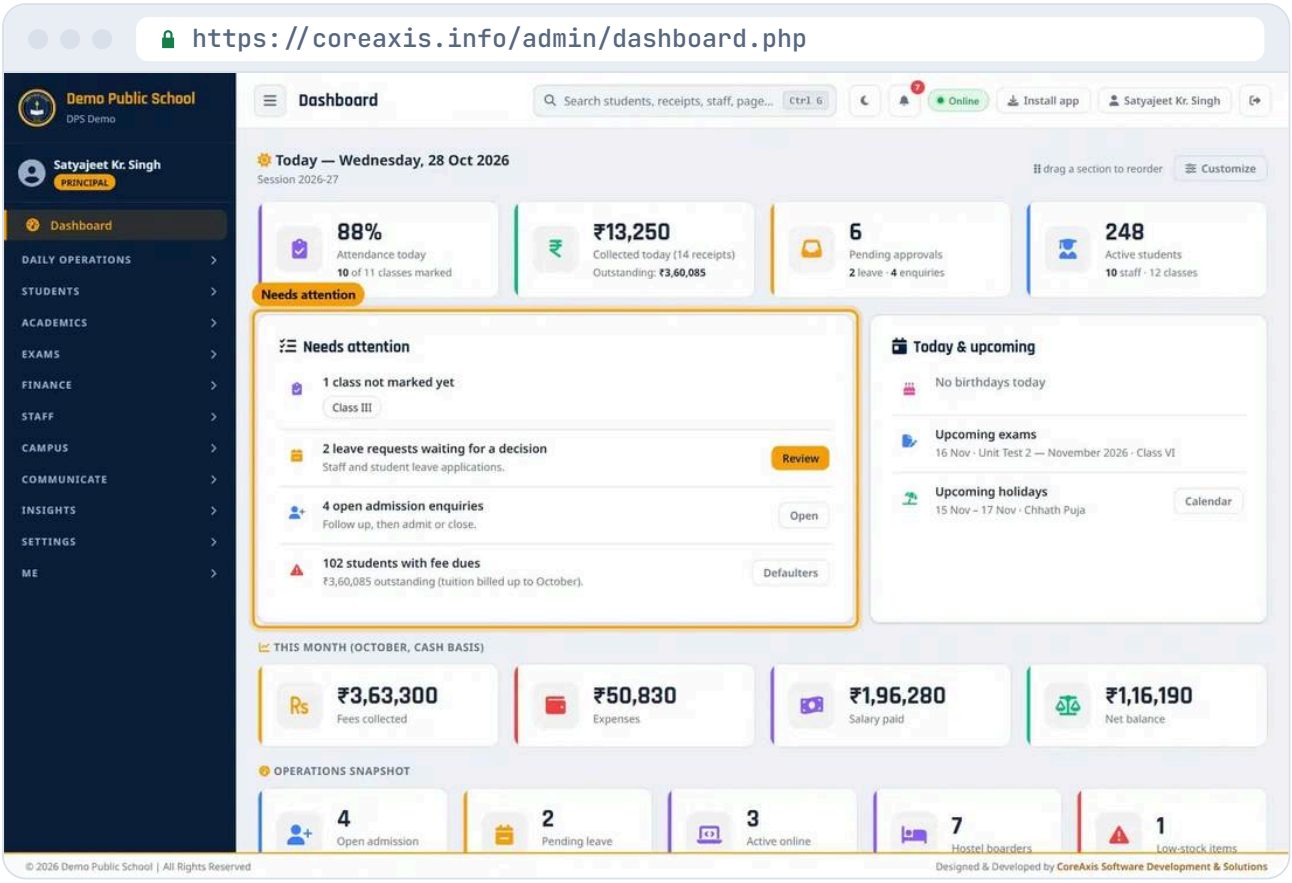
1. Click **Dashboard** at the top of the sidebar. The page opens with the date and the current session, for example Session 2026-27.

2 Read the four **Today** cards: attendance marked, fees collected today, pending approvals and active students.



Today: 88% attendance (10 of 11 classes marked), ₹13,250 collected today (14 receipts) with ₹3,60,085 outstanding, 6 pending approvals, 248 active students.

3 Look at **Needs attention**. It lists classes whose attendance is not marked yet (here Class III), leave requests, open admission enquiries and students with fee dues.

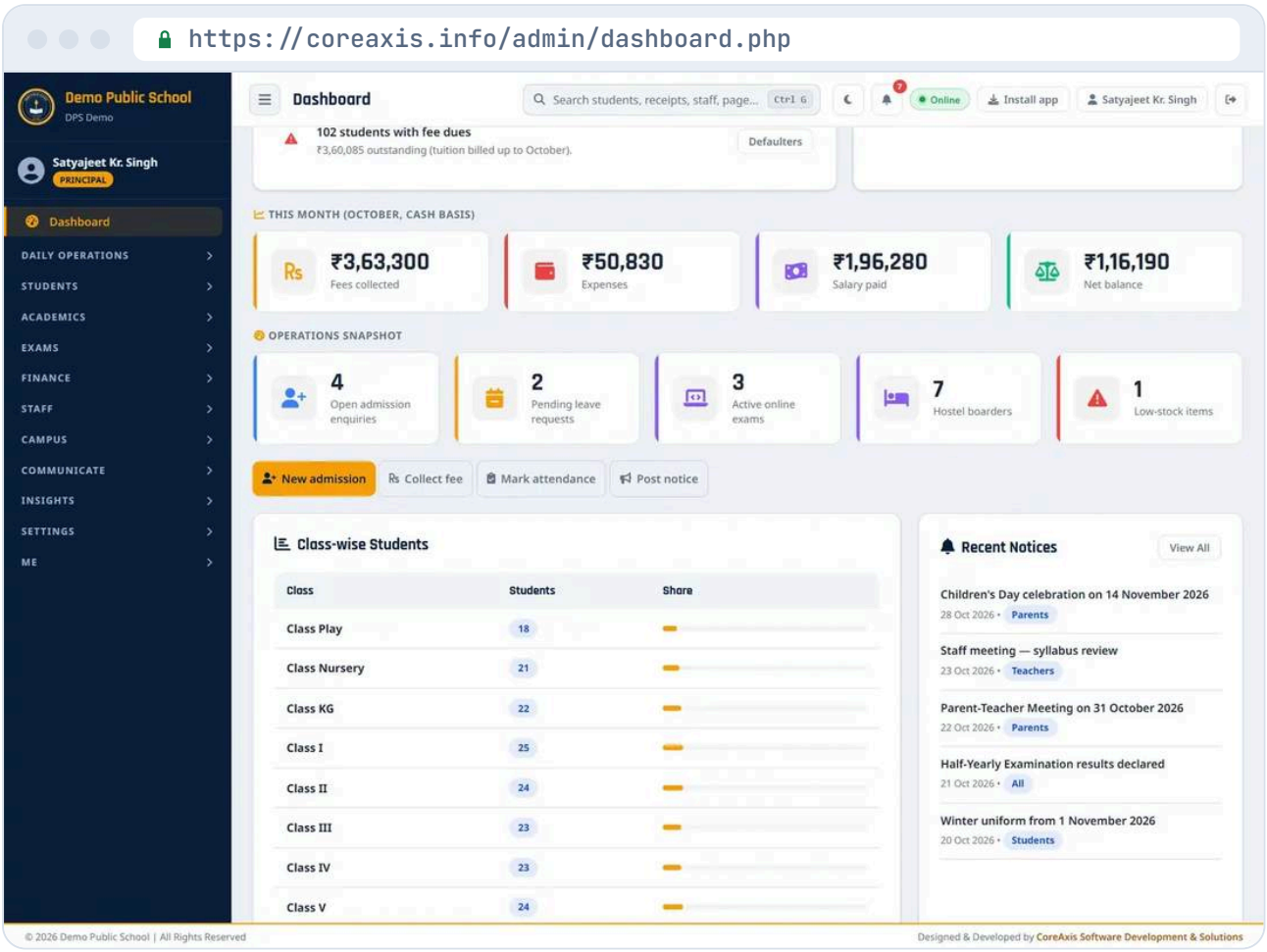


Needs attention on the left, Today & upcoming on the right.

4 Click a class chip such as **Class III** to open attendance for that class, or click **Review**, **Open** or **Defaulters** to go to that list.

5 Read **Today & upcoming** for birthdays today, exams and holidays in the next 3 weeks. Click **Calendar** for the holiday calendar.

6 Scroll down to **This month** (fees collected, expenses, salary paid, net balance) and **Operations snapshot**.



This month is on a cash basis: money actually received and paid in October (fees ₹3,63,300, net balance ₹1,16,190).

TIP Lower on the page are **Shortcuts** (New admission, Collect fee, Mark attendance, Post notice), **Class-wise Students**, **Recent Notices** and **Recent Admissions**.

TIP All amounts use Indian grouping (₹3,63,300; ₹10,07,050), and a minus figure is shown as −₹4,70,090.

Screen at a glance

Attendance today	Share of students present today and how many classes are marked, for example 10 of 11 classes marked.

Collected today	Fees received today and the number of receipts, with the total outstanding (tuition billed up to the current month).
Pending approvals	Leave requests plus open admission enquiries waiting for action.
Active students	Students on the active roll, with staff and class counts.
Needs attention	Unmarked classes, leave requests waiting for a decision, open admission enquiries, students with fee dues. Each row has a button to the list.
Today & upcoming	Birthdays today, exams and holidays in the next 3 weeks.
This month (cash basis)	Fees collected, Expenses, Salary paid and Net balance (fees minus expenses minus salary) for the current month.
Operations snapshot	Open admission enquiries, pending leave requests, active online exams, hostel boarders and low-stock items.
Shortcuts	New admission, Collect fee, Mark attendance, Post notice.
Class-wise Students	Number of active students in each class and the share of the school.
Recent Notices / Recent Admissions	The latest notices with audience, and the latest admitted students. **View All** and **All students** open the full lists.

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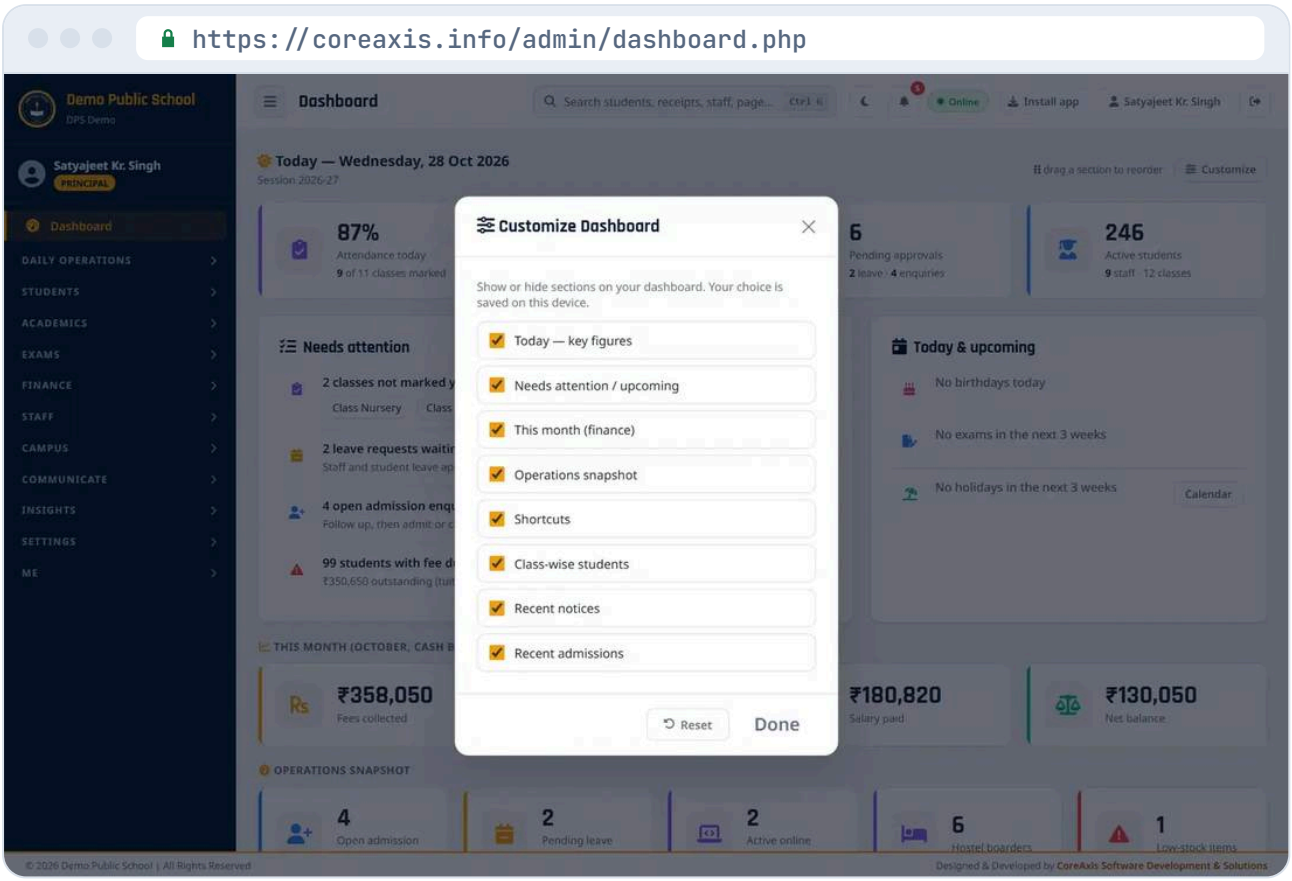
Customize the dashboard (example: hide Class-wise students)

1. Click **Customize** at the top right of the dashboard. The **Customize Dashboard** popup opens.

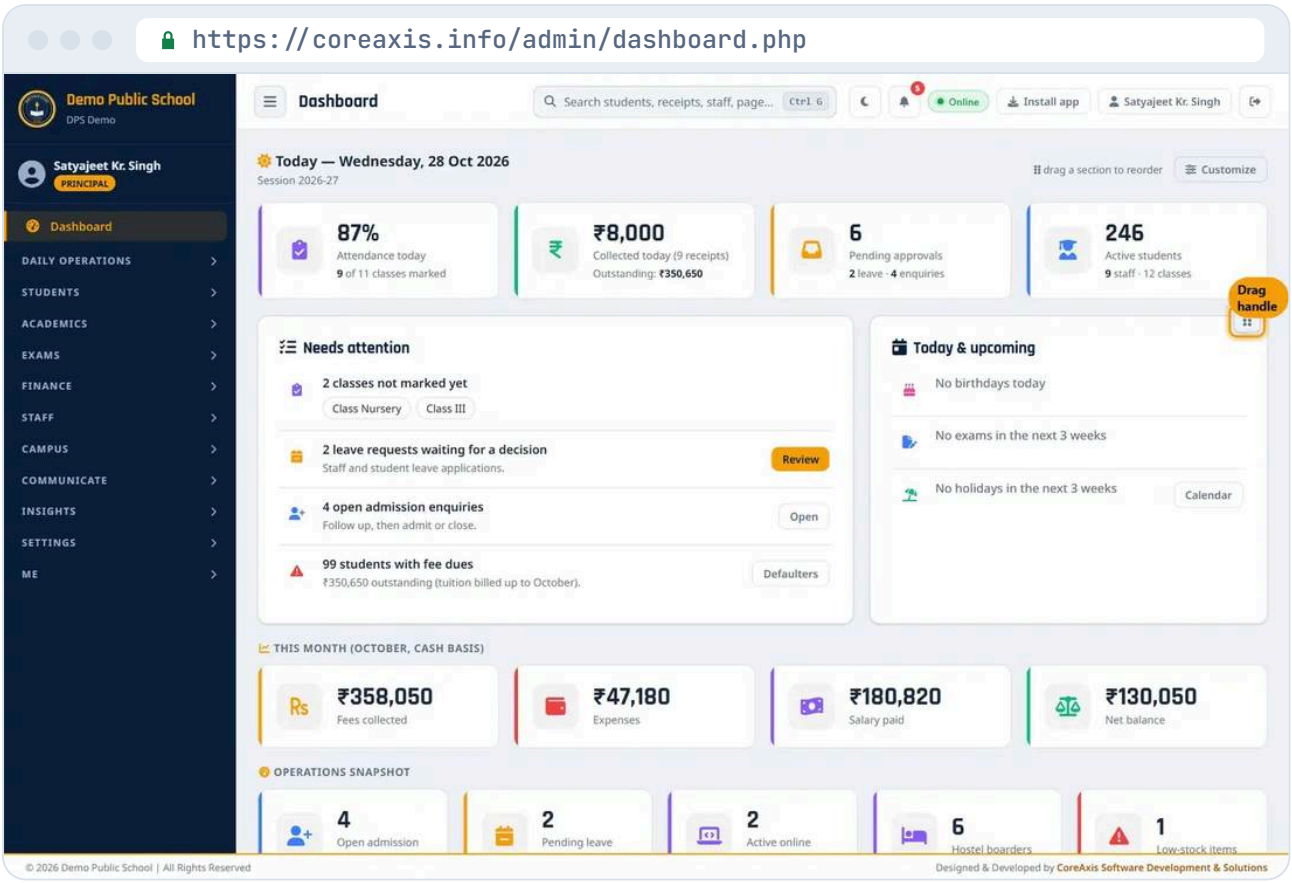


Tick the sections you want to see.

2. Untick a section you do not need, for example **Class-wise students**.

3. Click **Done**. The section is hidden at once.

4 To change the order, point at a section. A drag handle appears at its top right corner. Drag the handle up or down and drop the section where you want it.



The drag handle (six dots) on the Today & upcoming section.

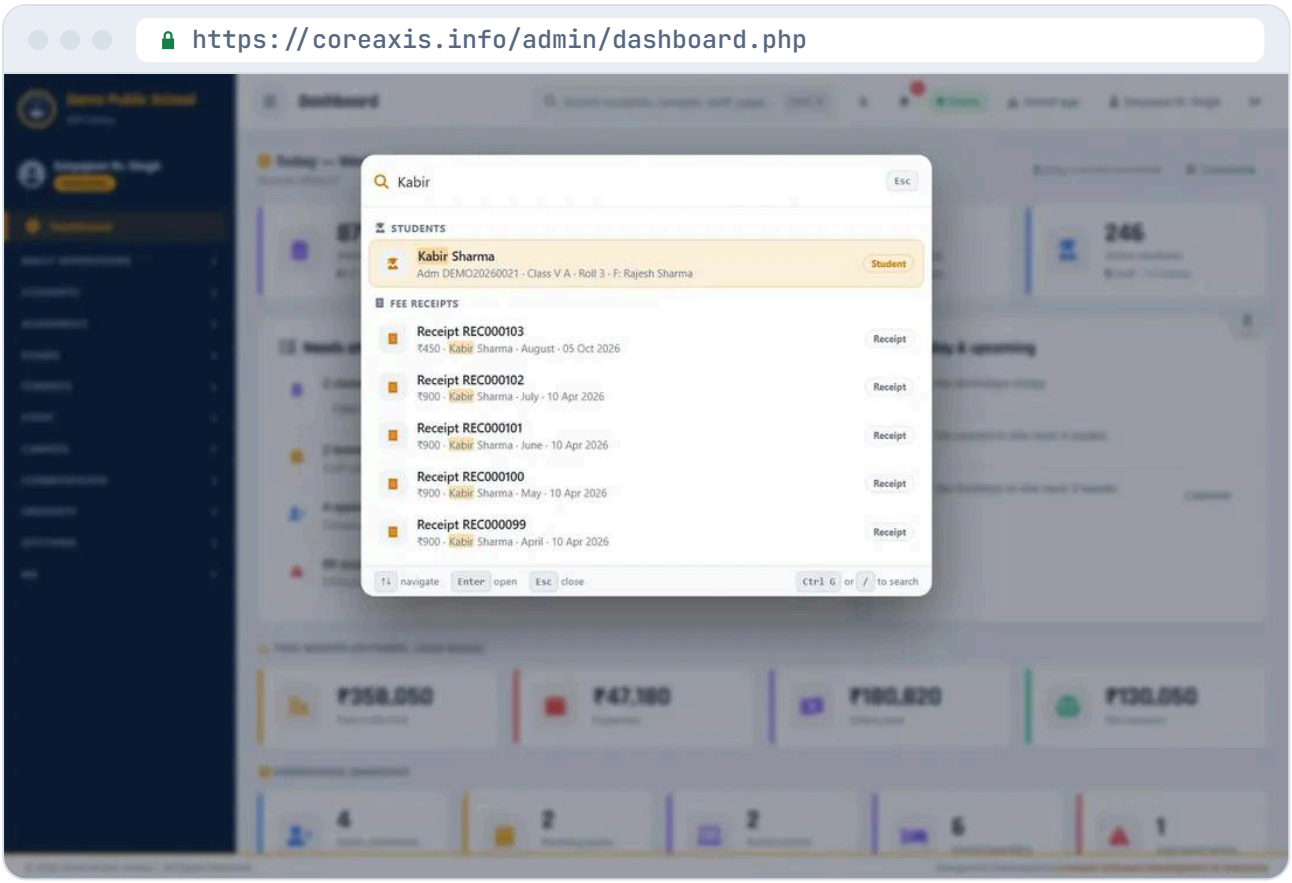
5 To go back to the standard layout, open **Customize** and click **Reset**.

TIP Your choice is saved on this device and browser only. Other staff and other computers keep their own layout.

Find anything with the search box (example: Kabir Sharma)

1 Click the search box in the top bar, or press **Ctrl G** (or **/**) on the keyboard.

2 Type a name, admission number, receipt number or page name, for example Kabir.



Results are grouped: students, fee receipts, staff, pages.

3 Use the arrow keys to move and press **Enter** to open, or click a result. Press **Esc** to close.

TIP Typing a menu name such as 'fee dues' or 'cash book' opens that page directly. You only see results from menus your role can open.

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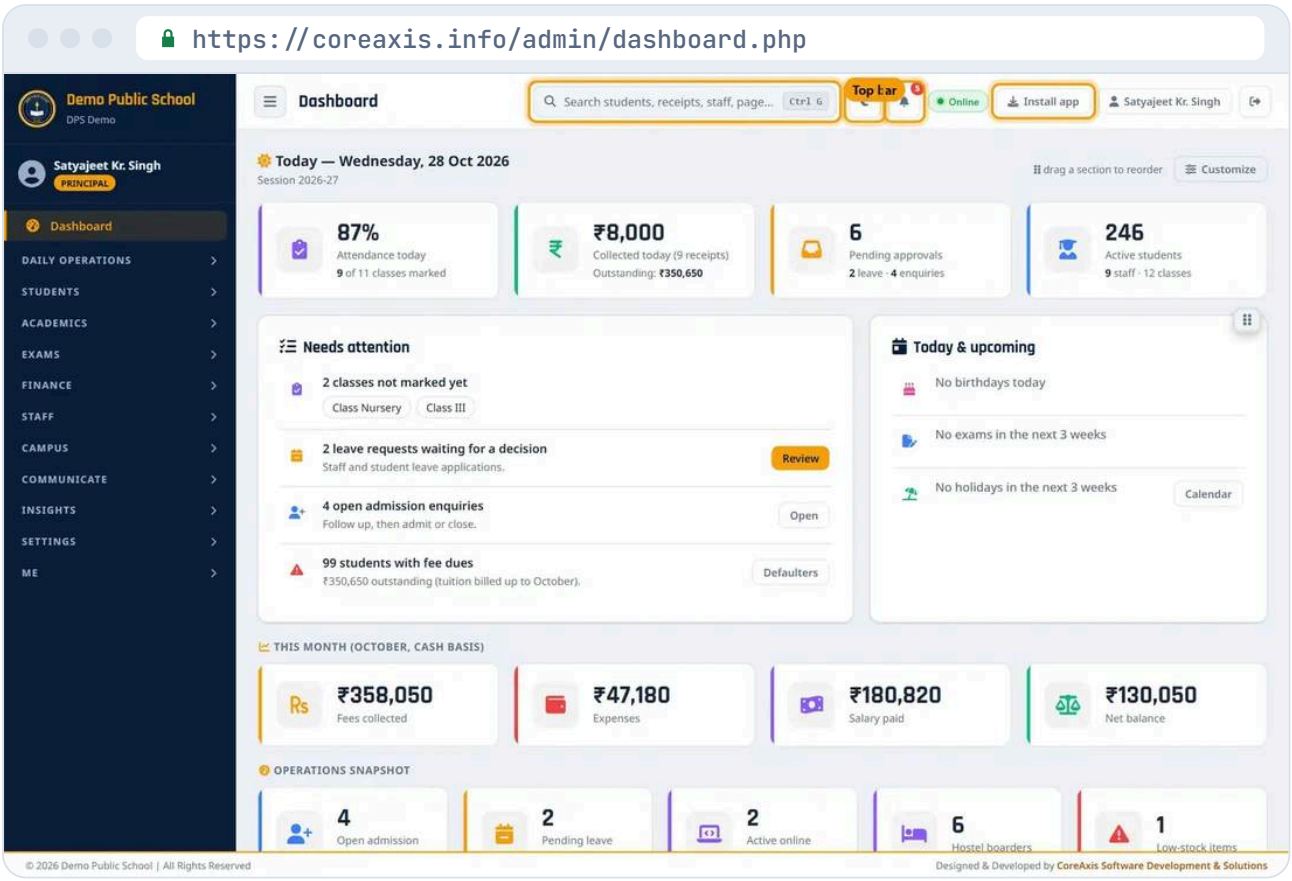
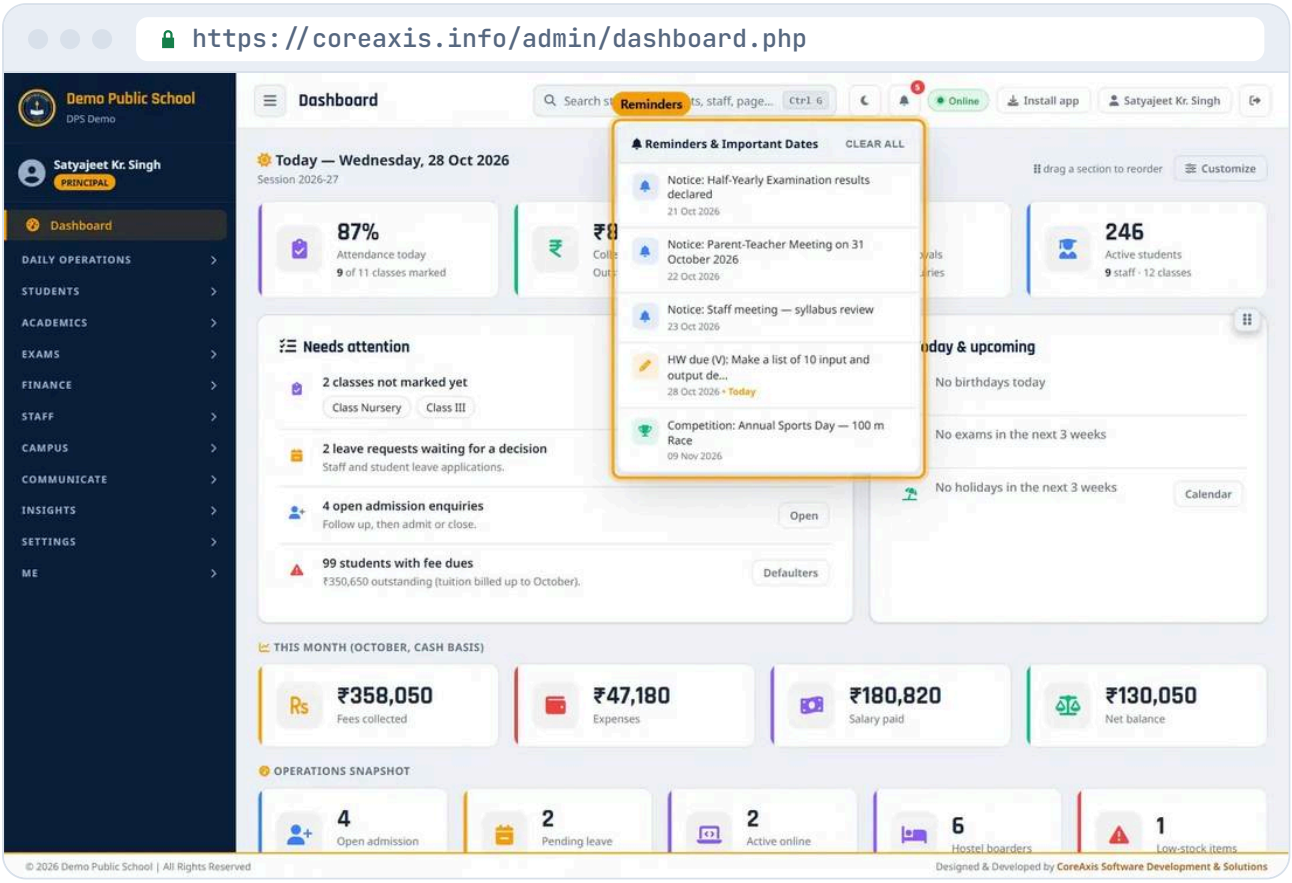
Top bar: reminders, dark mode, install app

1 Find the top bar buttons: search, dark mode (moon), the reminders bell, **Online** status, **Install app**, your name and **Logout**.



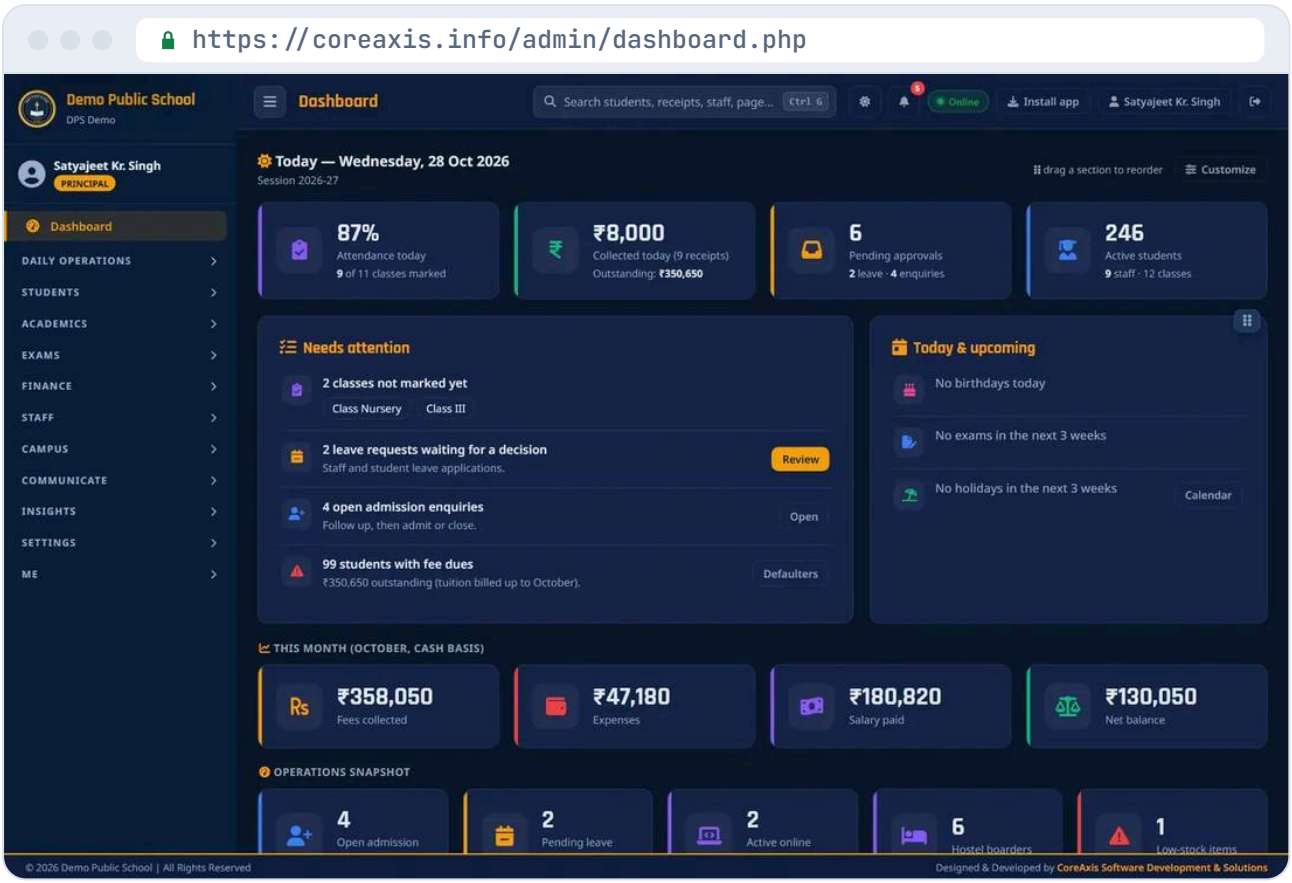
The top bar is the same on every page.

2 Click the bell to open **Reminders & Important Dates**: new notices, homework due, competitions and other dated items. The red number shows how many are new.



Click a reminder to open it; Clear all empties the list.

3 Click the moon icon to switch to dark mode. Click it again (sun) to go back to light mode.



Dark mode is remembered on this browser.

4 Click **Install app** to add CoreAxis to the desktop or phone home screen. It opens in its own window like an app. The button appears only in browsers that support it.

5 Click your name to open **My Profile**.

TIP **Online** turns to **Offline** when the internet connection drops. Pages you opened earlier can still be viewed, but nothing can be saved until you are back online.

Sidebar menus

The sidebar groups the menus. Click a group name to open or close it; only one group stays open at a time and the group of the page you are on opens by itself. The three-line button next to the page title makes the sidebar narrow.

Daily Operations	Attendance, Fee Desk, Leave Approvals.

Students	Students, Admission Enquiries, Inactive / Alumni, Student ID Cards, TC / Bonafide, Document Register.
Academics	Classes, Subjects, Timetable, Homework, Attendance Register, Substitution.
Exams	Create Exams, Marks Entry, Exam Eligibility, Exam Form Apply, Admit Cards, Online Exam, Report Cards, Exam Certificates.
Finance	Concessions, Cheques / DD, UPI / Bank Claims, Fee Dues, Fee Structure, Online Payment, Expenses, Salary / Payroll, Finance Ledger.
Staff	Staff, Staff Attendance, Staff ID Cards, Leave Management, Holiday Calendar.
Campus	Library, Transport, Hostel, Inventory.
Communicate	Notices, SMS, Gallery, Competitions, Letterhead & Letters.
Insights	Analytics, Reports.
Settings	School Profile, Academic Sessions, Plan & Billing.
Me	My Payslips, My Attendance, My Substitutions, My Leave, My Profile, Logout.

How the menus differ by role

Each person sees only what their role allows. A page that is not in your menu cannot be opened by typing its address either; the app shows an access-denied message.

1. **Admin and Principal** see the full sidebar above. Only they approve TC / SLC requests, concessions and leave, and change Settings.

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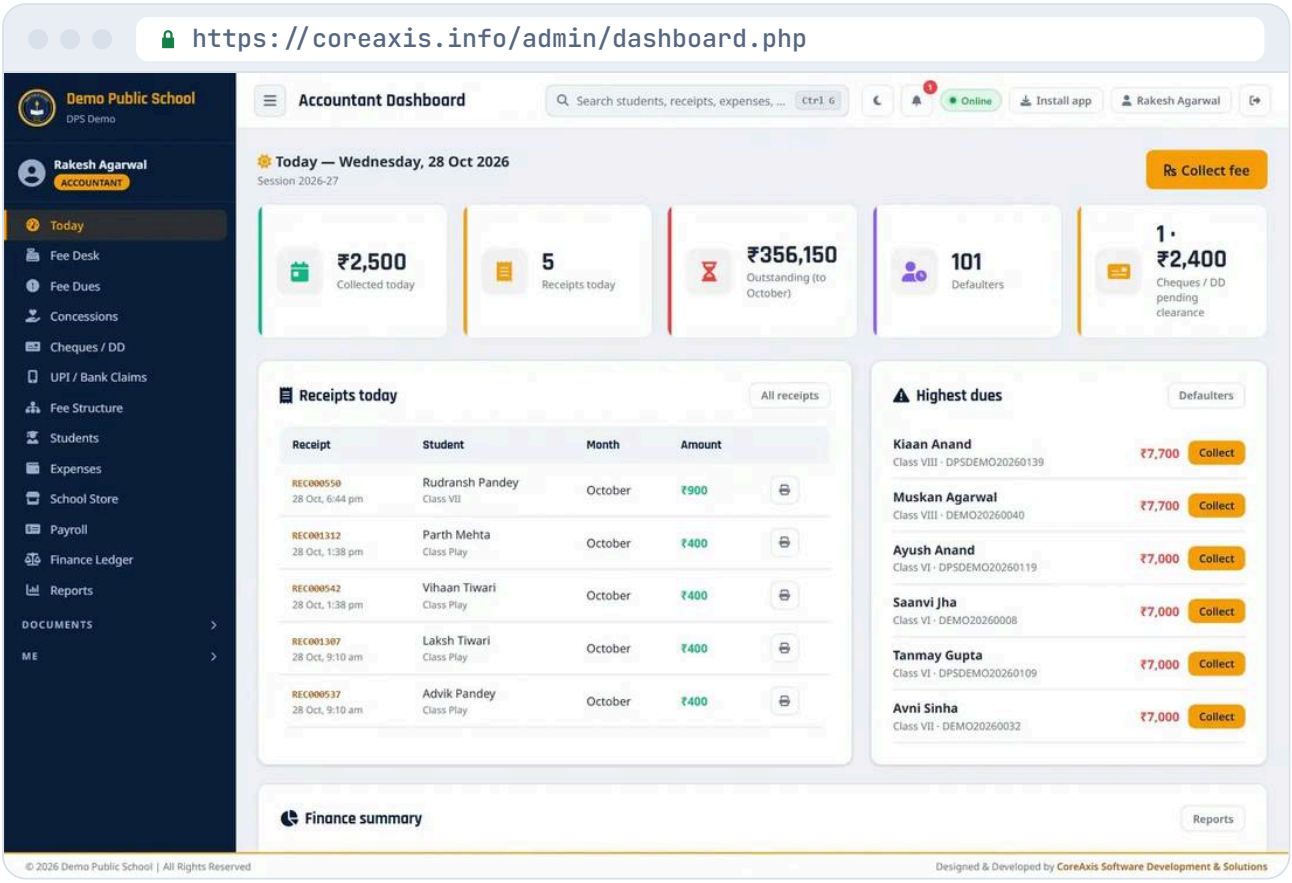
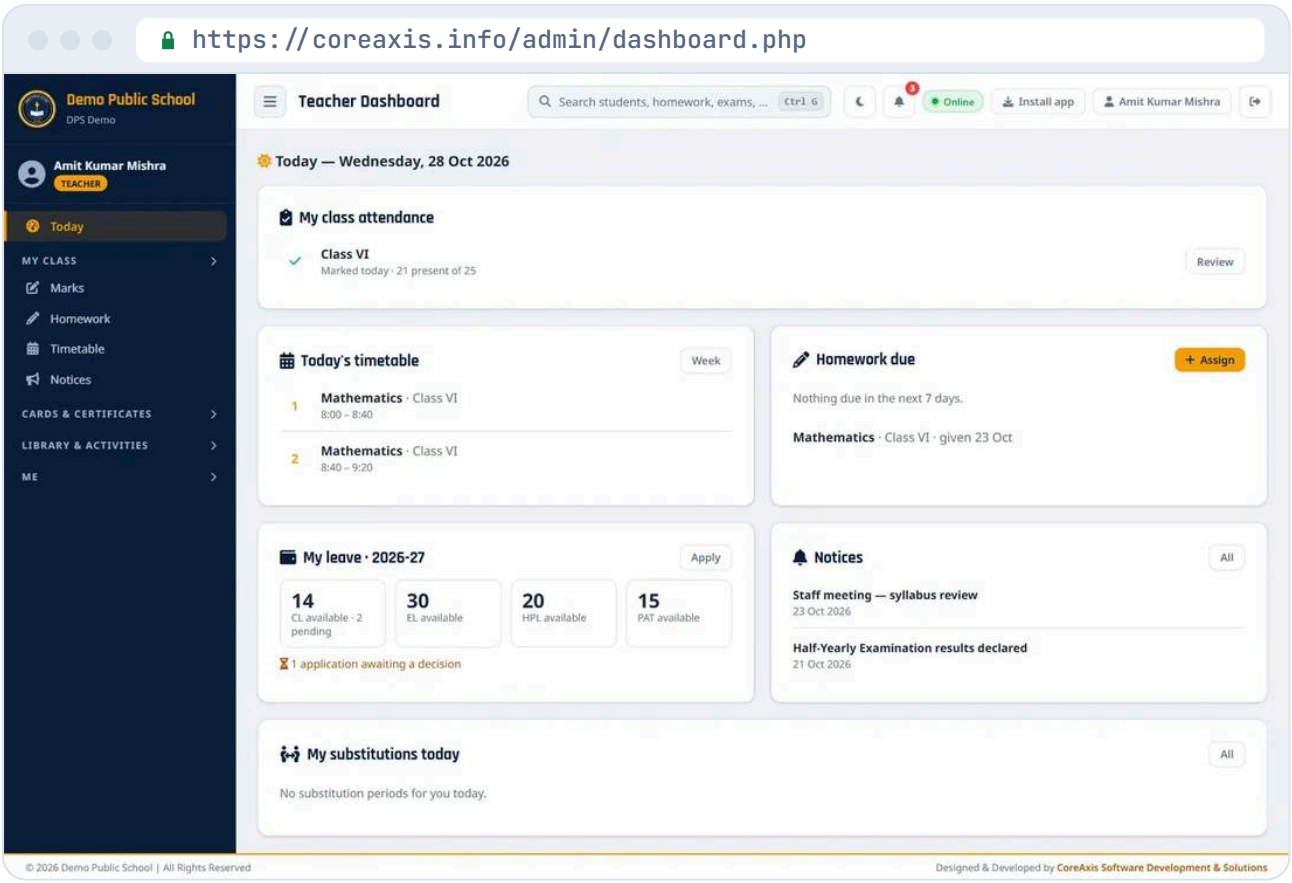
2 **Accountant** lands on **Today** (Accountant Dashboard): fees collected today, receipts today, outstanding, defaulters, cheques pending clearance, receipts today and highest dues with a **Collect** button. The menu is a flat list: Fee Desk, Fee Dues, Concessions, Cheques / DD, UPI / Bank Claims, Fee Structure, Students, Expenses, School Store, Payroll, Finance Ledger, Reports, plus Documents and Me.



The Accountant's Today screen (Rakesh Agarwal).

3 **Teacher** lands on **Today** (Teacher Dashboard): my class attendance, today's timetable, homework due, my leave balance, notices and substitutions. The menu has My Class (Attendance, Attendance Register, Report Cards), Marks, Homework, Timetable, Notices, Cards & Certificates, Library & Activities and Me. A teacher sees only the classes assigned to them.



The Teacher's Today screen (Amit Kumar Mishra).

Questions

The dashboard numbers look old.

The figures are worked out when the page opens. Reload the page (F5) to see the latest.

I hid a section by mistake.

Click Customize, tick the section again and click Done, or click Reset.

Why does Collected today differ from This month?

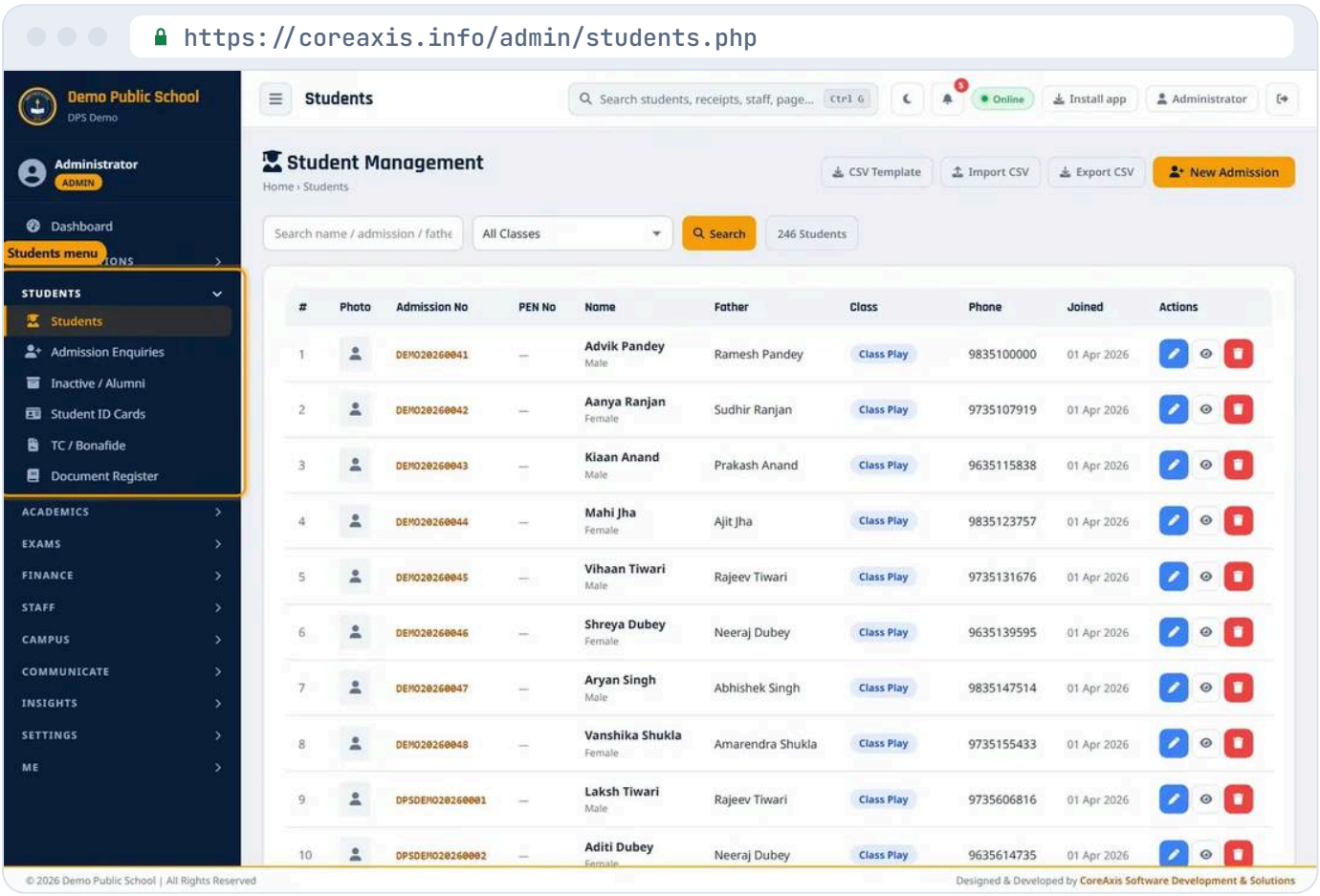
Collected today is only today's receipts. This month adds up every fee received from the 1st of the month, on a cash basis.

STUDENTS · CHAPTER 4

Students

Admin Principal MENU Students › Students

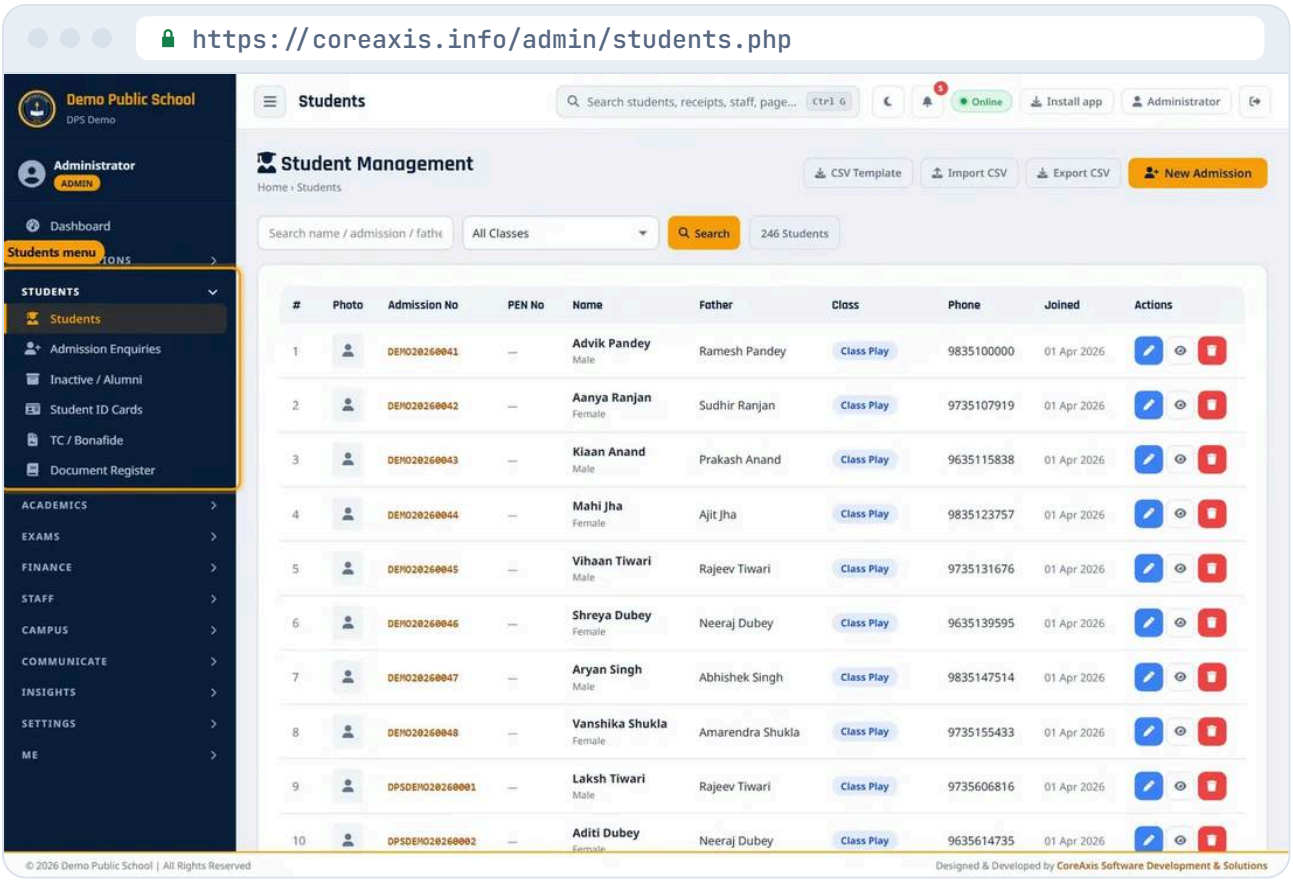
Students is the school's master list of active students. Every other module (attendance, fees, exams, ID cards, certificates, the parent portal) reads the student record kept here. A new admission gets an admission number and roll number automatically, and its fee dues are created from the class fee. Admins and Principals add and edit students; the Accountant has a view-only Students page for looking up a student before collecting fees.



Students — Demo Public School

Find a student (example: all students of Class I)

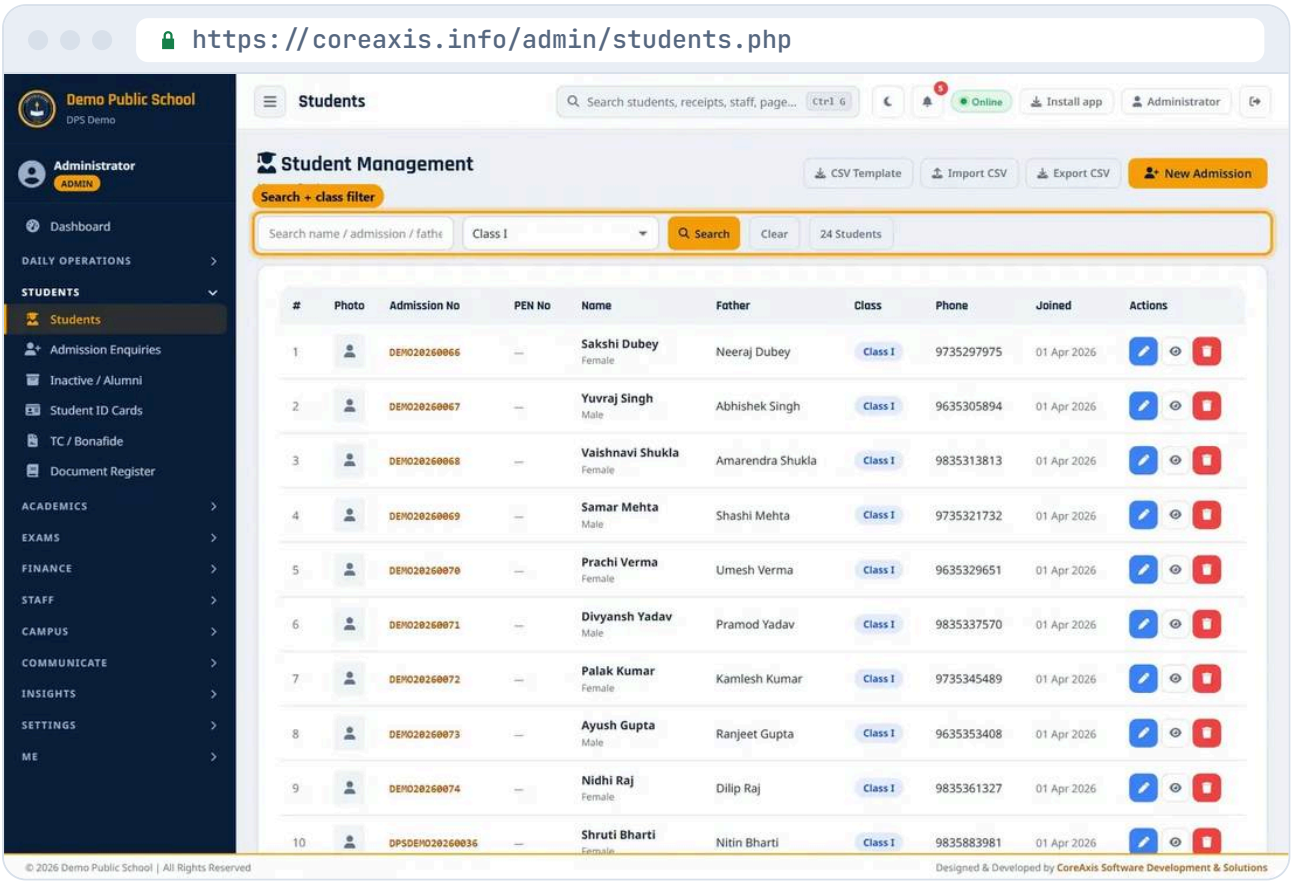
1 In the sidebar open **Students** and click **Students**. The **Student Management** list opens with all active students, 25 per page.



The Students list. The count button shows how many students match.

2 Pick a class in the **All Classes** box, for example **Class I**. The list reloads with that class only.

3 To search, type part of a name, admission number or father's name in **Search name / admission / father...** and click **Search**.



The list after picking Class I.

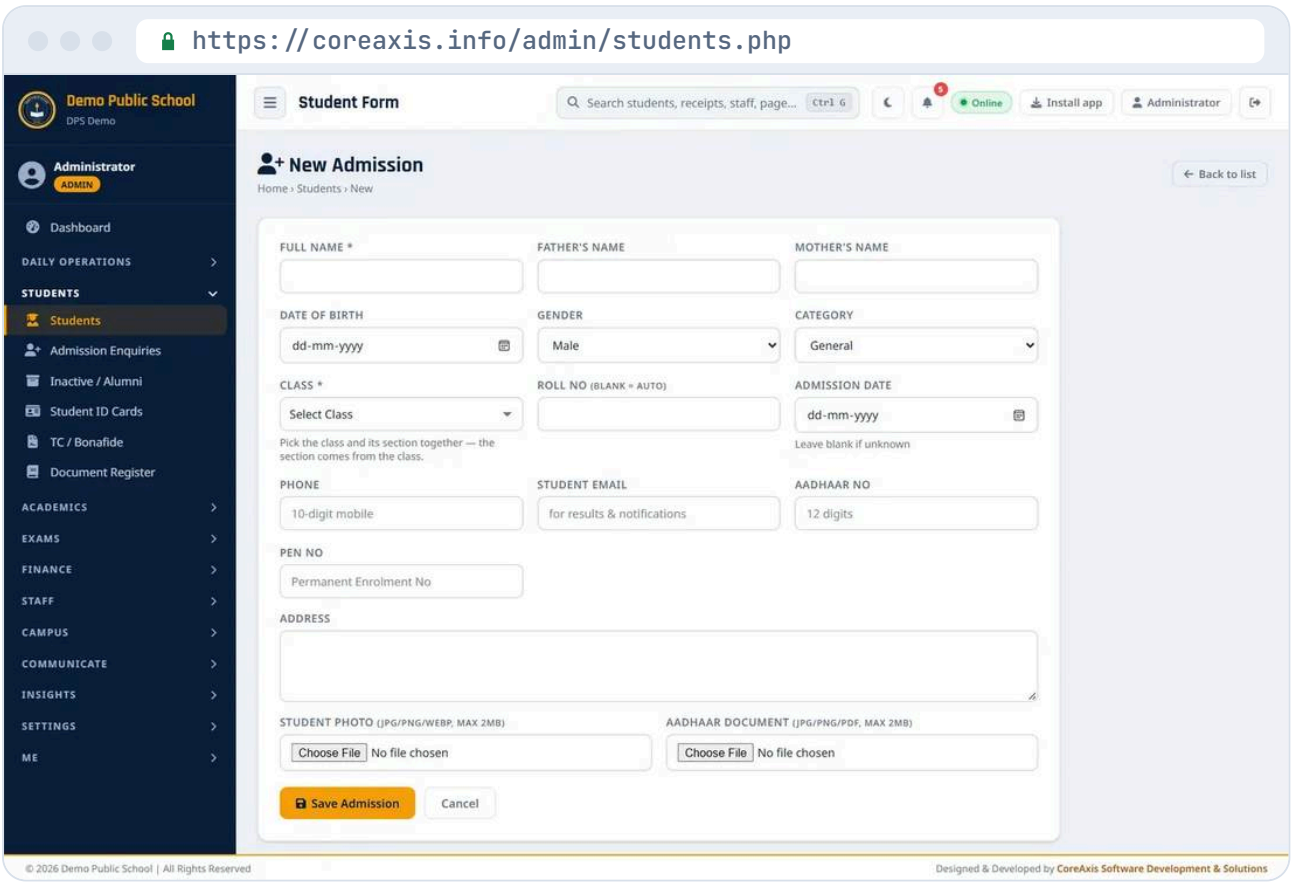
4 Click **Clear** to remove the search and the class filter.

5 Use **« Prev**, the page numbers and **Next »** at the bottom to move between pages.

TIP The global search in the top bar (Ctrl G) also finds a student from any page.

Admit a new student (example: Ananya Singh, Class I-A)

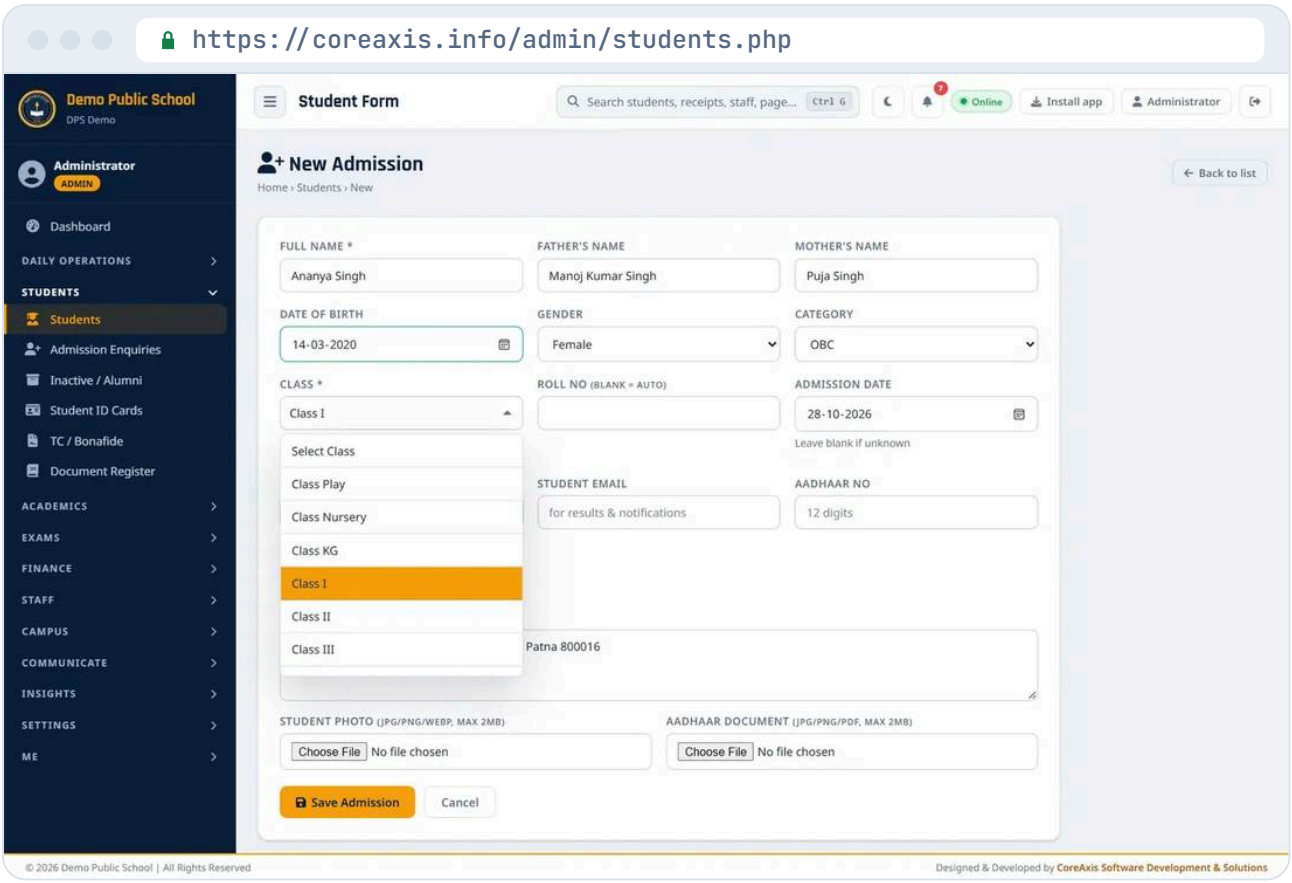
1. On the Students list click **New Admission**. The **New Admission** form opens.



The empty New Admission form.

2. Type **Full Name** (required): Ananya Singh.
3. Type **Father's Name**: Manoj Kumar Singh, and **Mother's Name**: Puja Singh.
4. Pick **Date of Birth**: 14-03-2020. Choose **Gender**: Female and **Category**: OBC.

5 Click **Class** (required) and pick **Class I**. The section comes with the class (Class I has section A).

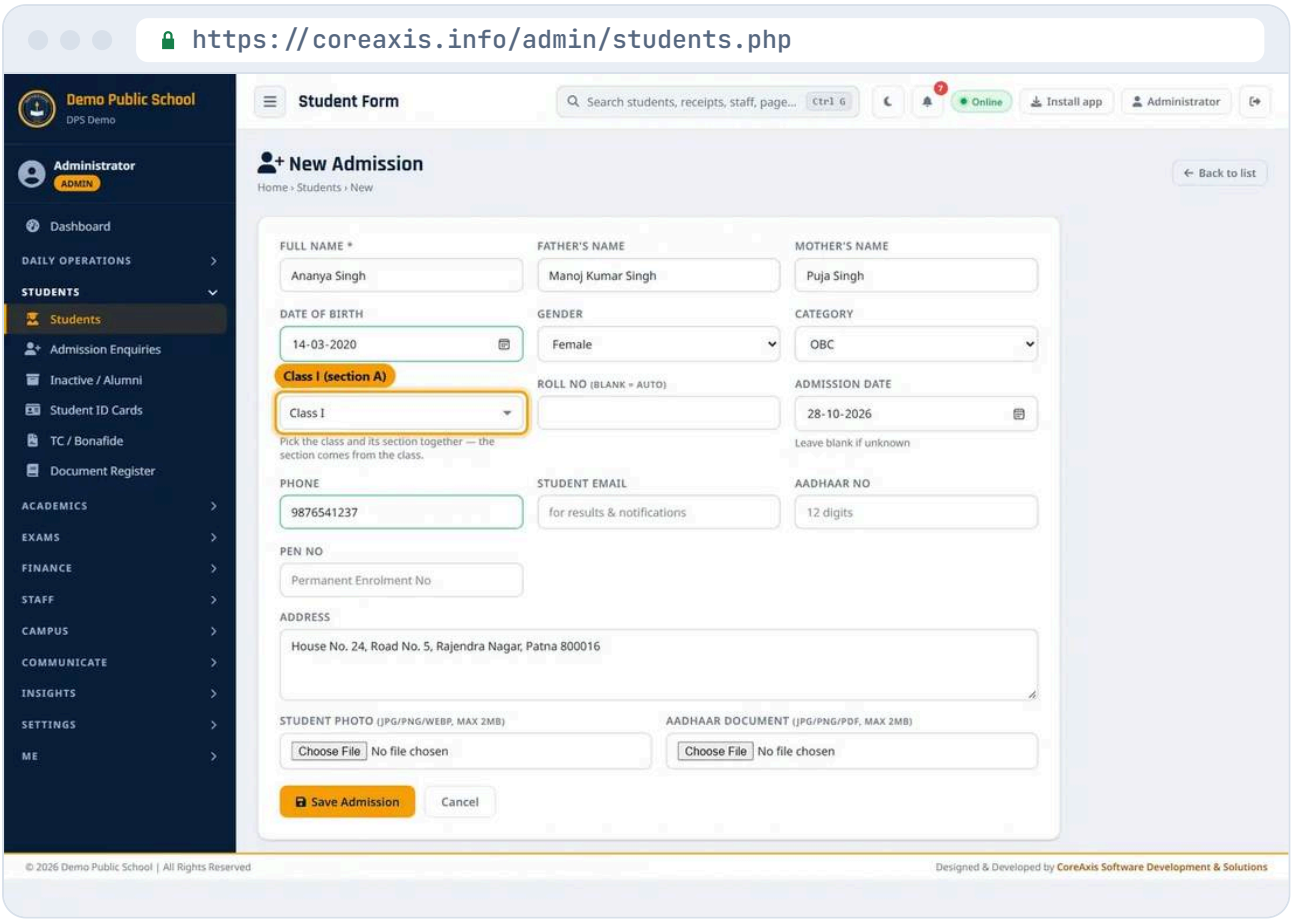


Type in the box to filter the class list.

6 Leave **Roll No** blank to get the next roll number automatically. Set **Admission Date**: 28-10-2026.

7 Type **Phone**: 9876541237 (10 digits). This number gets SMS alerts and is used for sibling matching.

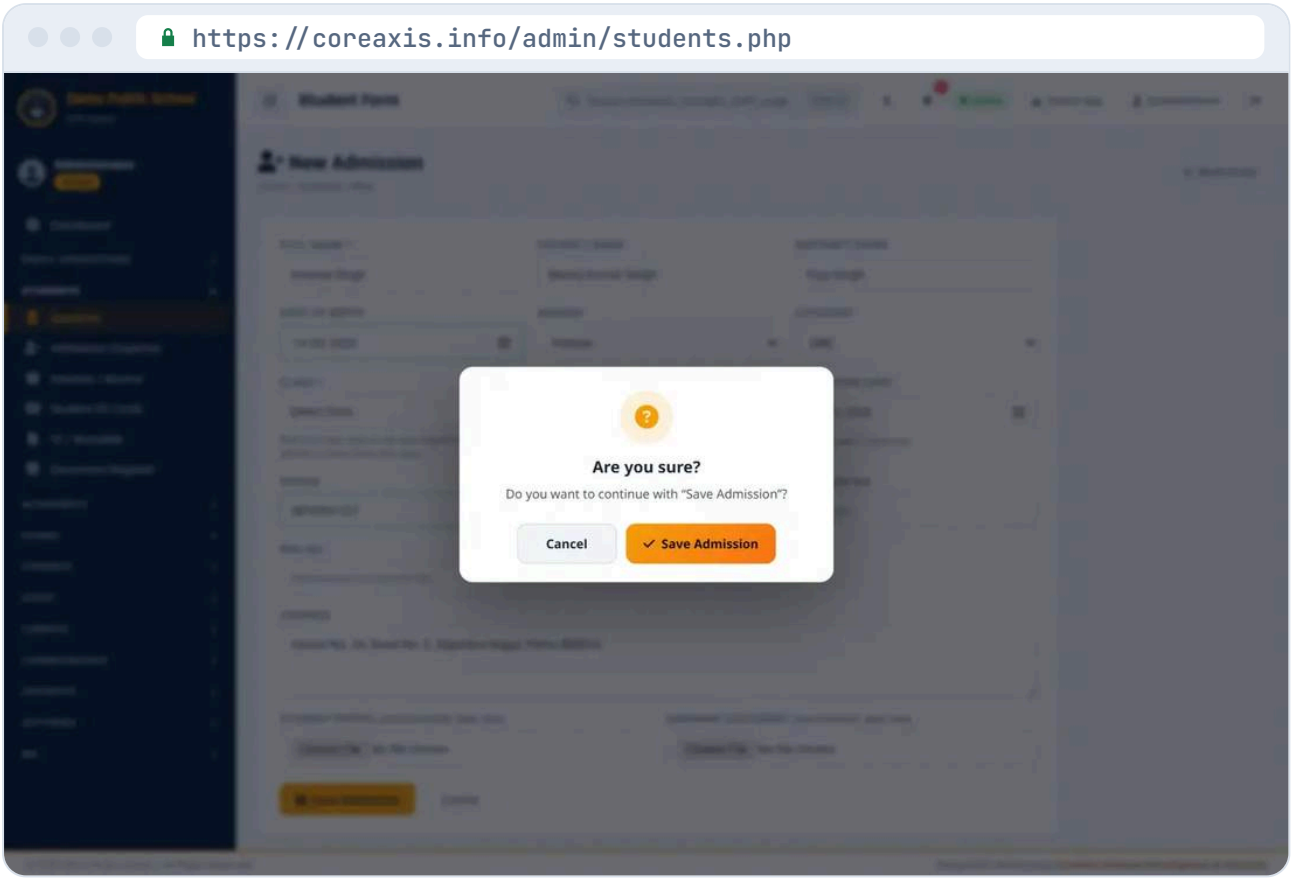
8 Type the **Address**: House No. 24, Road No. 5, Rajendra Nagar, Patna 800016. Fill **Student Email**, **Aadhaar No** and **PEN No** if you have them.



The filled form for Ananya Singh.

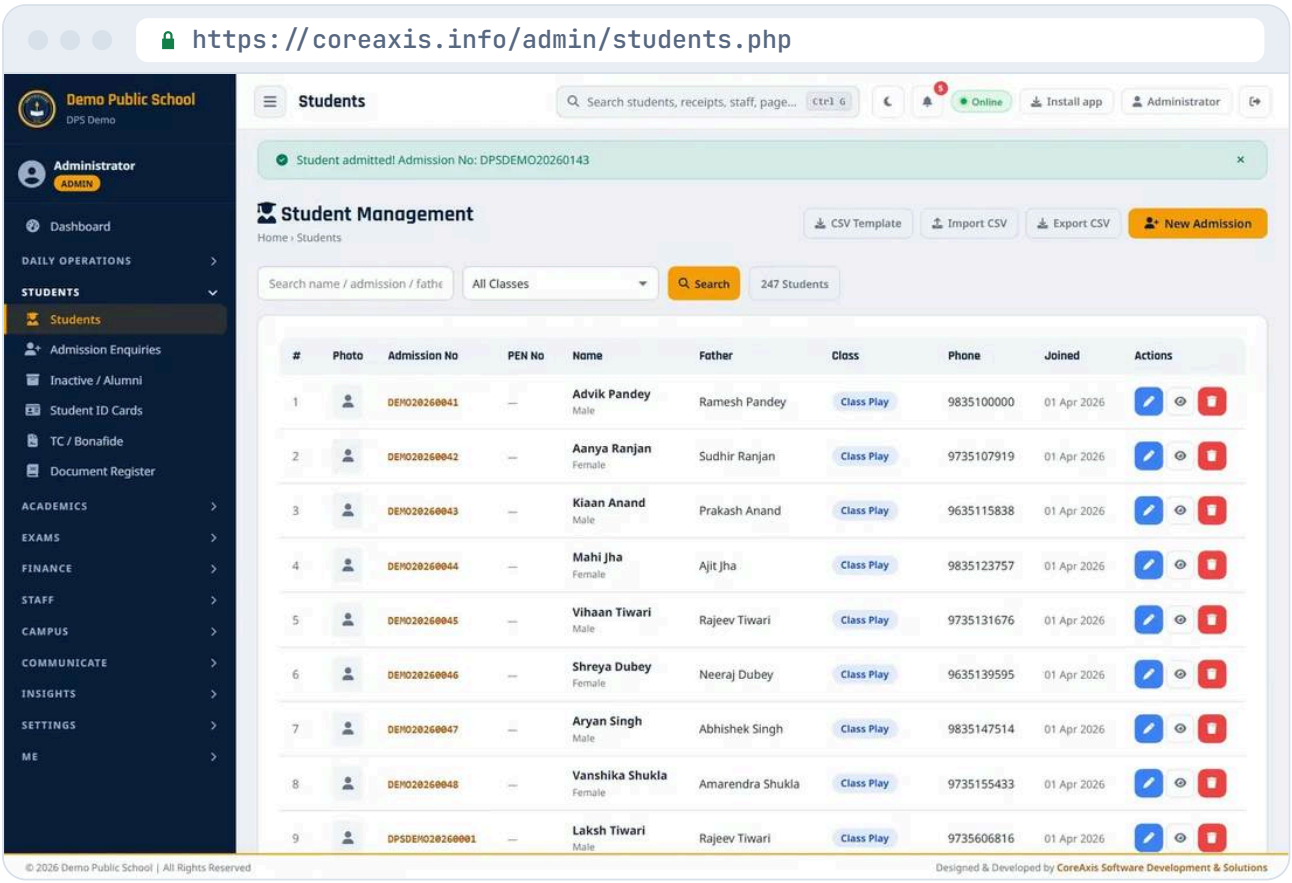
9 Optionally choose a **Student Photo** (JPG/PNG/WEBP, max 2 MB) and the **Aadhaar Document** (JPG/PNG/PDF, max 2 MB).

10 Click **Save Admission**, then **Save Admission** again in the popup.



Every save asks for confirmation.

11 The list opens with the message **Student admitted! Admission No: DPSDEMO20260143**. Write this number on the admission form.



The new admission number is shown at the top.

TIP Fee dues for the new student are created from the class fee. Depending on the school's Fee Structure setting, tuition is billed from the start of the session or from the admission month; Ananya's profile shows ₹4,900 due right after admission.

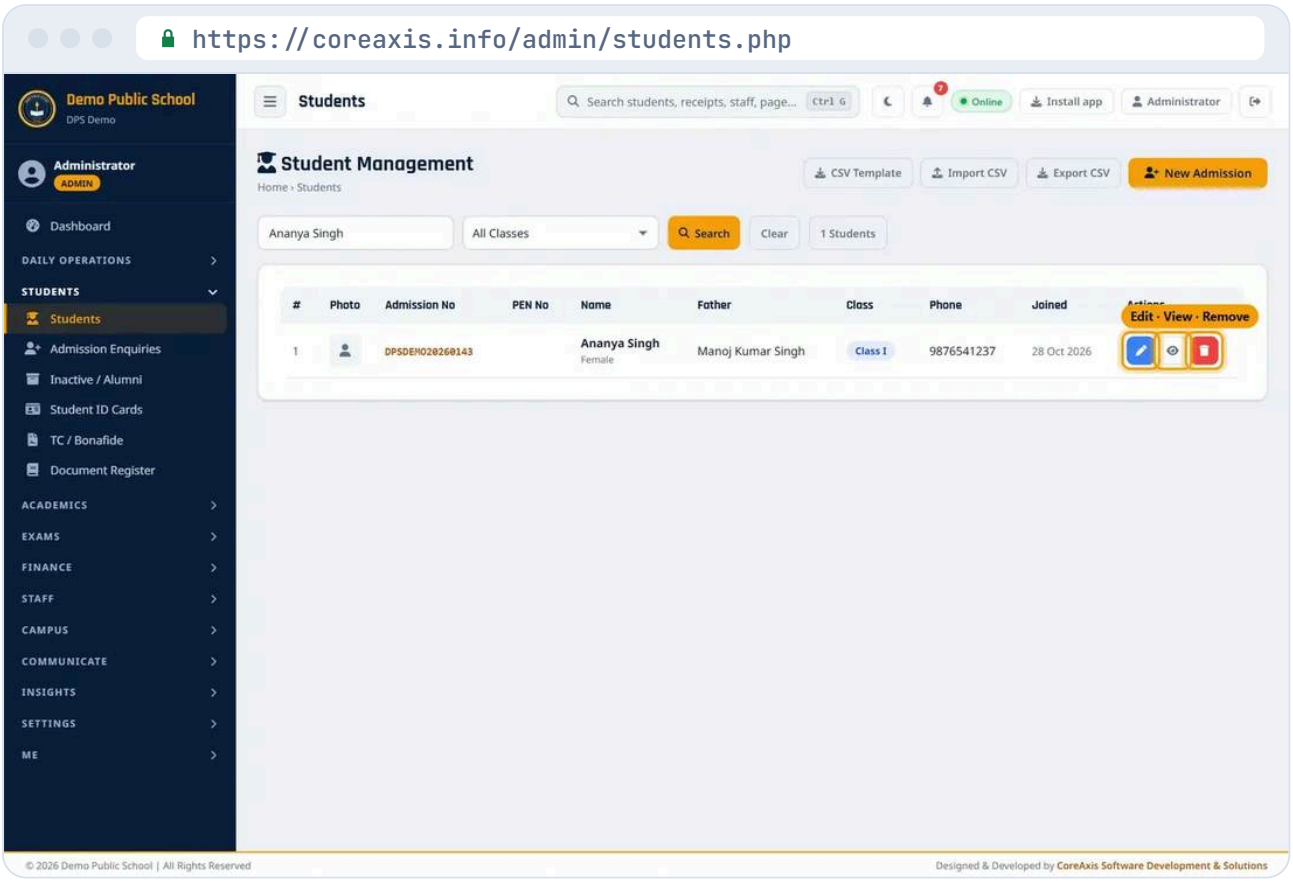
TIP If an SMS gateway is set up, the parent gets an admission SMS with the admission number.

TIP If a required field is wrong, the form stays open and lists what to fix at the top. Nothing is lost.

IMPORTANT When the plan's student limit is reached, the form refuses new admissions. Upgrade the plan in Settings › Plan & Billing.

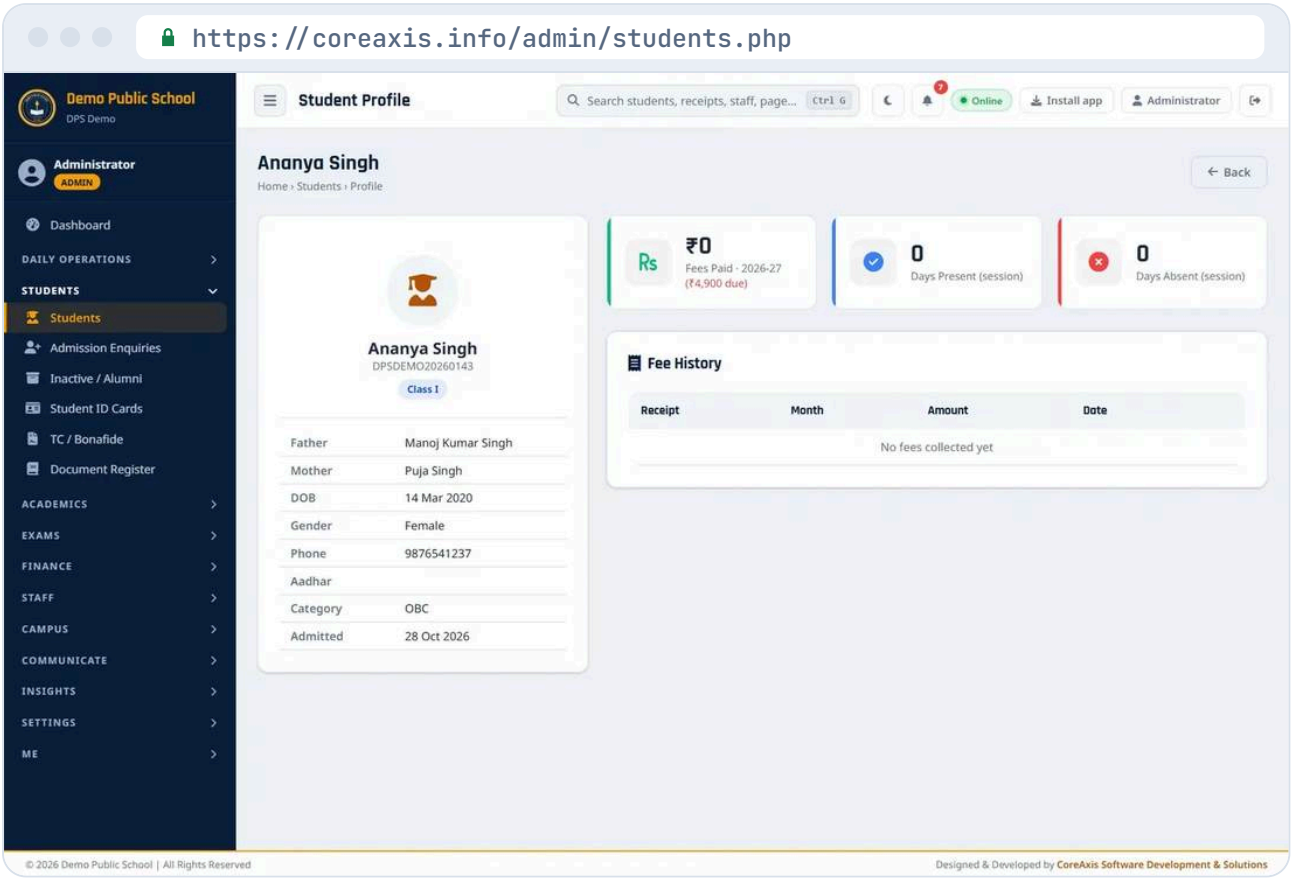
View a student's profile (example: Ananya Singh)

1 Find the student in the list. The **Actions** column has three buttons: **Edit** (pencil), **View** (eye) and **Remove** (bin).



Row actions for Ananya Singh.

2 Click **View**. The profile opens.



Profile: personal details on the left, fees and attendance on the right.

3 Read the left card: admission number, class, father, mother, date of birth, gender, phone, Aadhaar, category and admission date. If an Aadhaar document was uploaded, click **View** next to **Aadhaar doc**.

4 Read the three cards on the right: **Fees Paid** this session (with the amount due in red), **Days Present (session)** and **Days Absent (session)**.

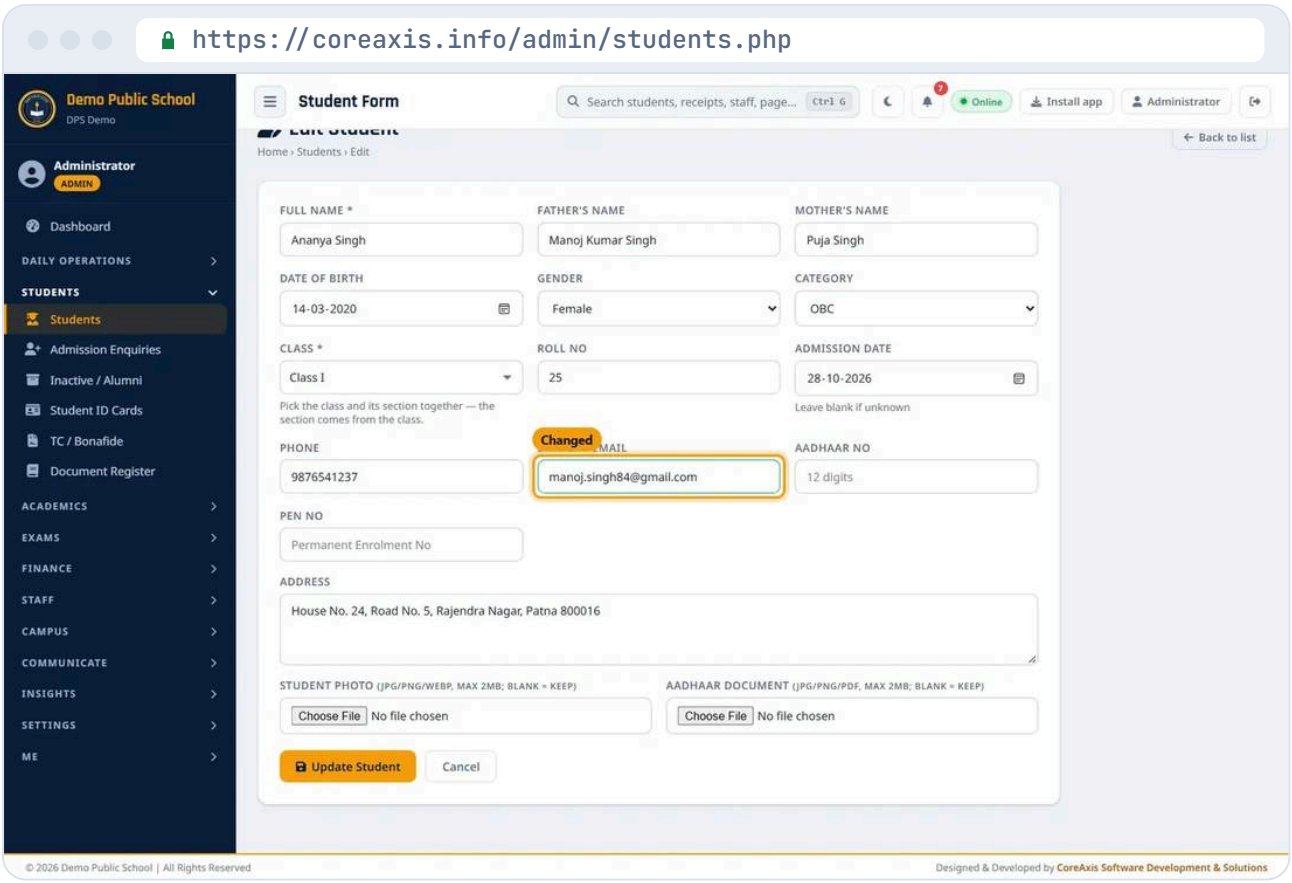
5 Look at **Fee History** for the last 12 receipts. Click the print button on a row to reprint that receipt.

6 Click **Back** to return to the list.

Edit a student (example: add Ananya's parent email)

1 In the list click **Edit** (pencil) on the student's row. The **Edit Student** form opens with the saved details.

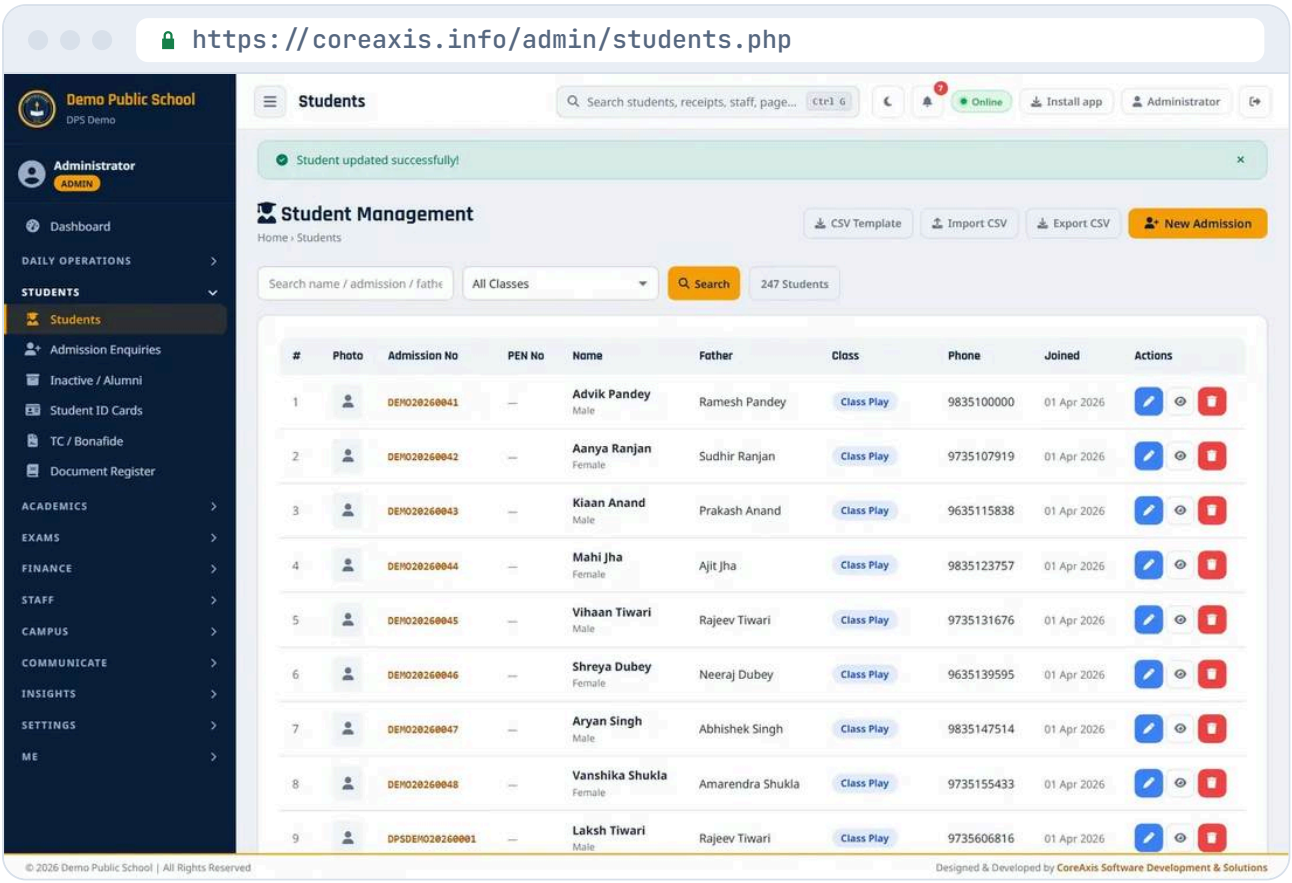
2 Change what you need, for example type manoj.singh84@gmail.com in **Student Email**.



The edit form is the same as the admission form.

3 Leave **Student Photo** and **Aadhaar Document** empty to keep the files already saved.

4 Click **Update Student** and confirm in the popup. The message **Student updated successfully!** appears.



Changes are saved at once.

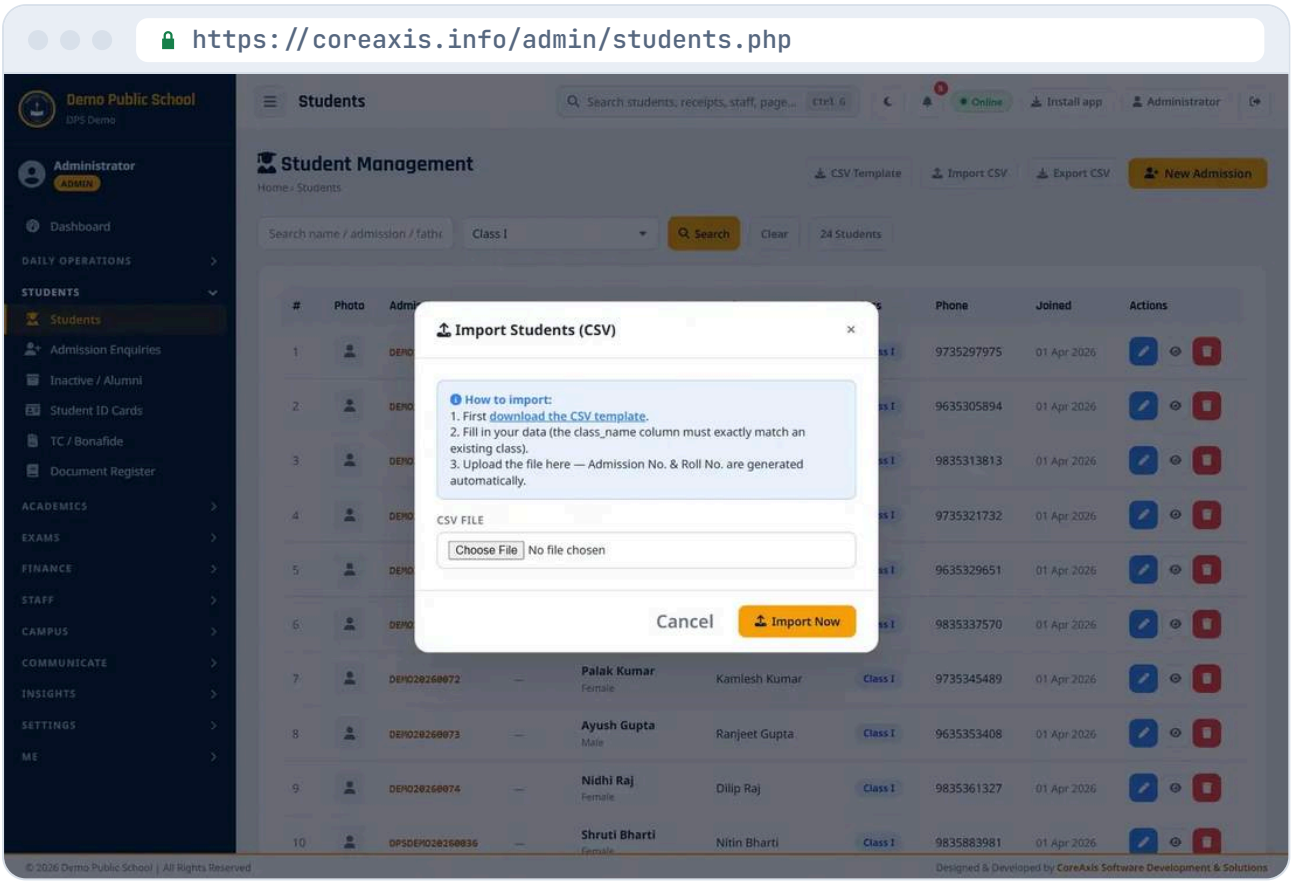
TIP Changing the class moves the student to the new class from now on. Fee months already billed keep their amount; the new class fee applies from the next billed month.

Import or export students as CSV

1 Click **CSV Template** to download a sample file with the right column names (full_name, father_name, mother_name, dob, gender, class_name, section, admission_date, phone, aadhar_no, pen_no, caste_category, address).

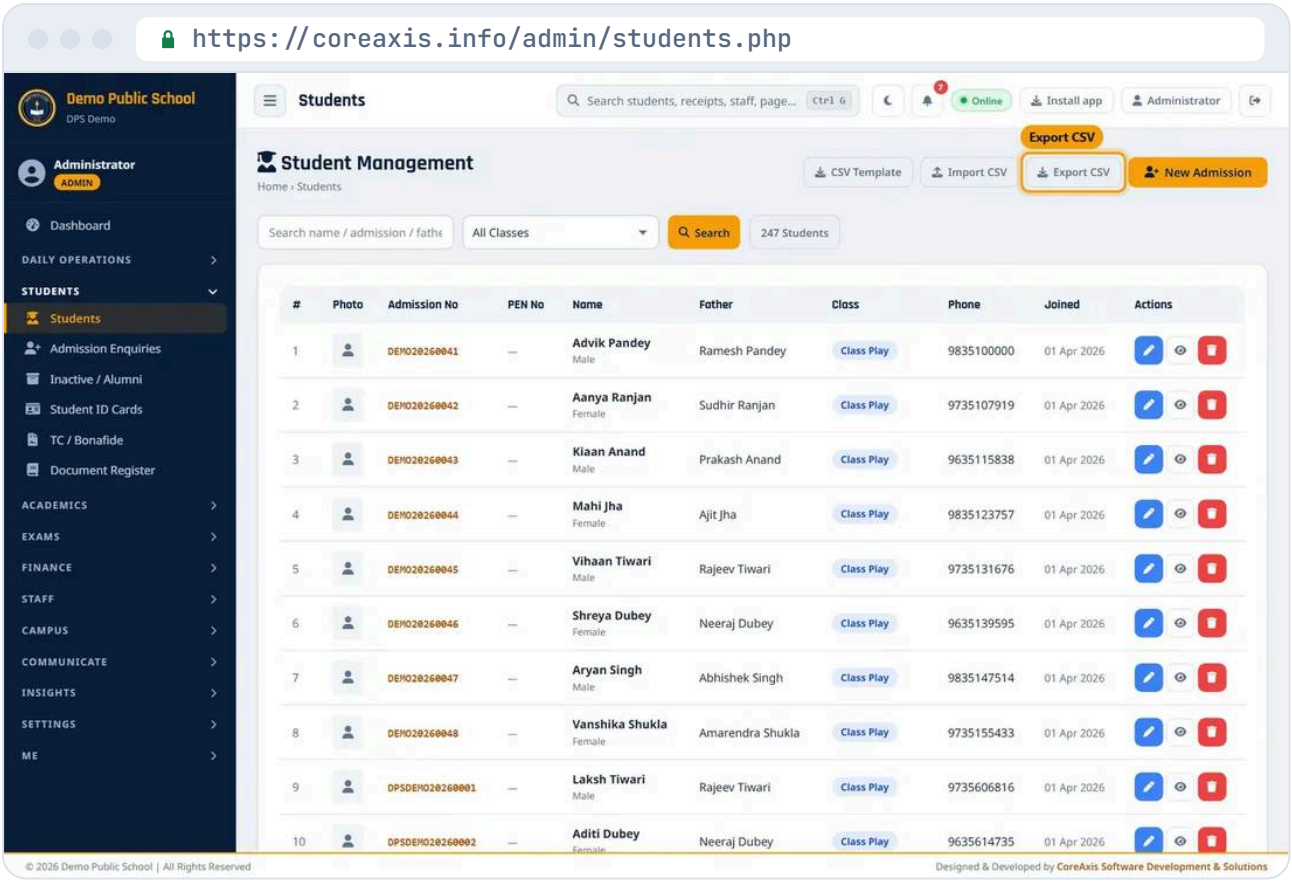
2 Fill one row per student in Excel or Google Sheets. The **class_name** must match an existing class exactly (for example I, II, KG). Save as CSV.

3 Click **Import CSV**, choose the file in **CSV File** and click **Import Now**. Admission numbers and roll numbers are generated automatically.



The Import Students (CSV) popup.

4 To take out a list, pick a class (or keep All Classes) and click **Export CSV**. The file has admission no, name, parents, date of birth, gender, class, section, roll no, admission date, phone, Aadhaar, PEN, category and address.



Export CSV downloads the students shown by the class filter.

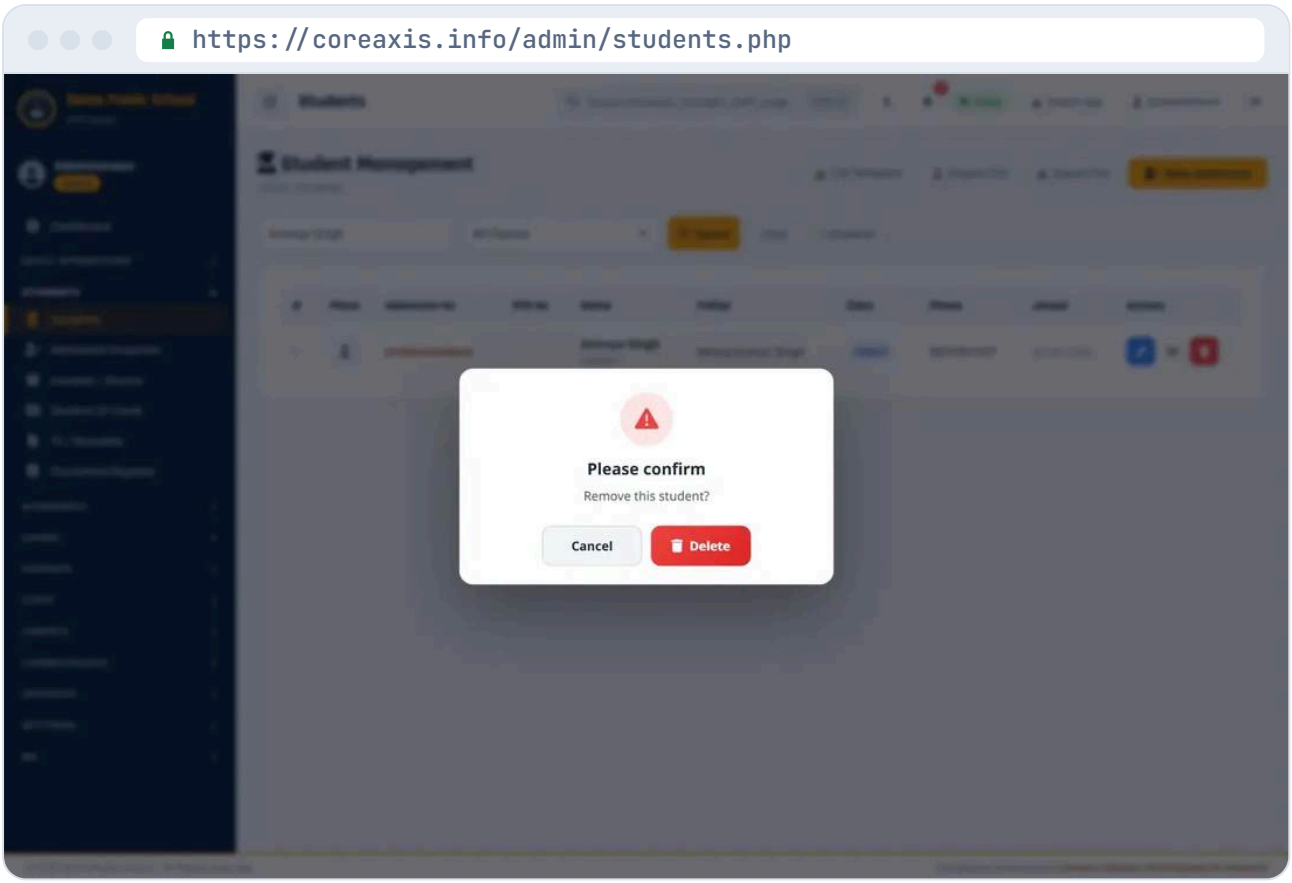
IMPORTANT The export contains Aadhaar numbers and phone numbers. Keep the file safe and do not share it outside the school office.

Remove a student who has left

Remove takes a student off the active roll. The record, marks and fee history are kept and the student appears in Inactive / Alumni, from where they can be restored.

1 Find the student and click **Remove** (red bin) on the row.

2 Read the **Please confirm** popup and click **Delete**. A second popup asks again; click **Yes, proceed** to remove, or **Cancel** to stop.



Remove asks twice.

3 The message **Student removed.** appears. Any hostel bed and transport seat of the student are released.

TIP For a student leaving with a Transfer Certificate, issue the TC from **TC / Bonafide** instead. Issuing the original TC marks the student Left with the leaving date and reason.

Screen at a glance

CSV Template / Import CSV / Export CSV	Download the import format, bulk-import students, export the current class filter as a CSV file.
New Admission	Opens the admission form.
Search / All Classes	Search by name, admission number or father's name; filter by class. **Clear** removes both.
N Students	How many active students match the search and filter.

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Columns	#, Photo, Admission No, PEN No, Name (with gender), Father, Class, Phone, Joined (admission date), Actions.
Form: Full Name *, Class *	The only required fields. Class sets the section.
Form: Roll No	Blank = next free roll number in the class.
Form: Admission Date	Leave blank if unknown. Used for the Joined column and for fee billing when the school bills from admission.
Form: Phone, Student Email	Phone gets SMS alerts (absent, fee reminders). Email gets results and notifications.
Form: Aadhaar No, PEN No	12-digit Aadhaar and the Permanent Enrolment Number from UDISE+.
Form: Student Photo, Aadhaar Document	The photo prints on the ID card and certificates.

Questions

I admitted a student in the wrong class.

Click Edit, pick the right Class and click Update Student. Check the roll number after the change.

Two brothers have the same father's name and phone. Are they linked?

Siblings are linked by the office in Finance › Concessions › Siblings. The app suggests them from the same father's name and phone, but never links them on its own.

Can the Accountant add students?

No. The Accountant's Students page is for looking up students only. Admissions are done by the Admin or Principal.

Where did a removed student go?

To Students › Inactive / Alumni. Click Restore there to bring the student back to the active roll.

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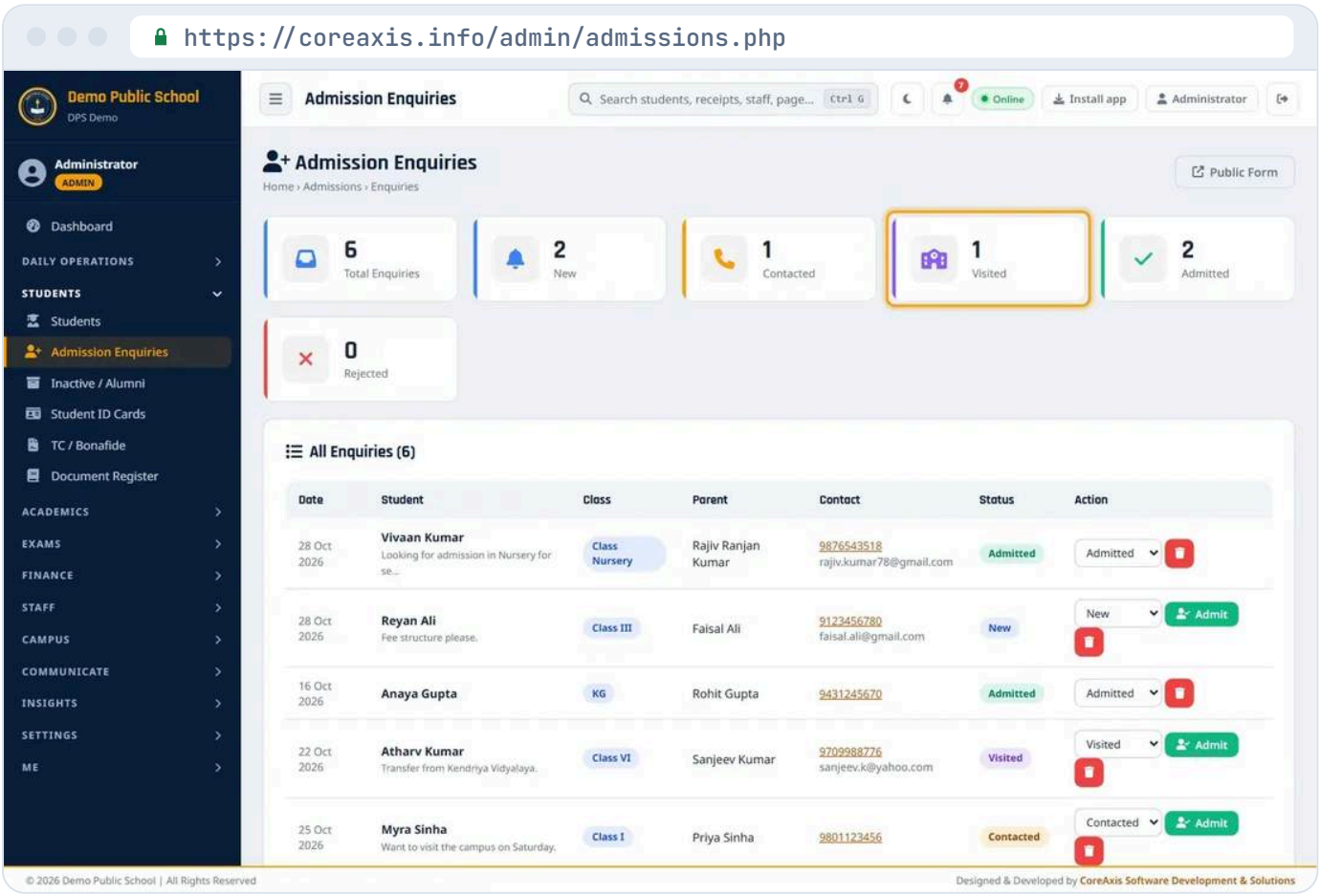
STUDENTS · CHAPTER 5

Admission Enquiries

Admin Principal MENU Students › Admission Enquiries

Parents fill the online Admission Enquiry form on the school website. Each enquiry lands in Admission Enquiries with the status New. The office calls the parent, moves the enquiry to Contacted (and to Visited once the family has seen the school), and when the child joins clicks Admit: the New Admission form opens already filled from the enquiry. The Dashboard counts open enquiries under Needs attention.

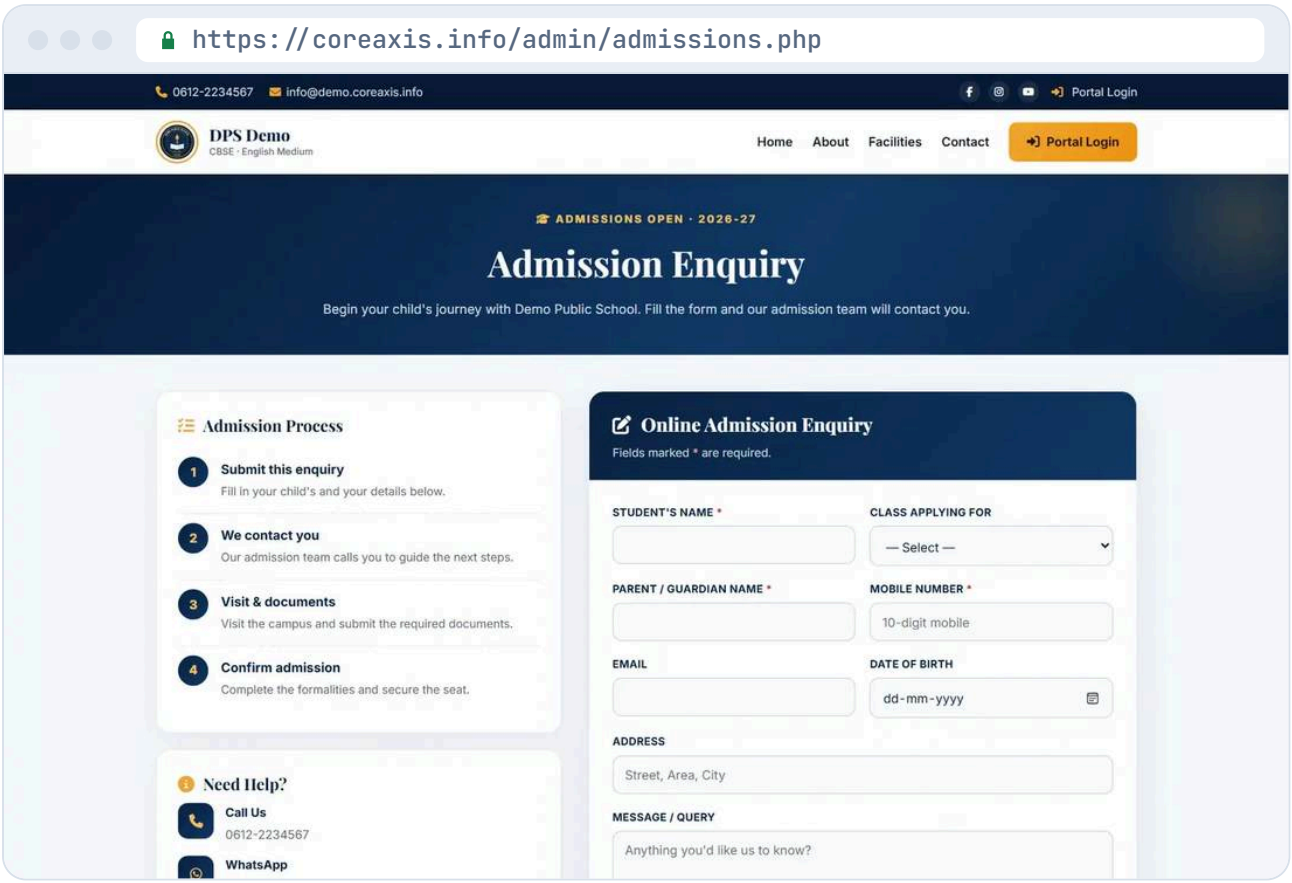


Admission Enquiries — Demo Public School

A parent sends an enquiry (example: Vivaan Kumar for Nursery)

This is what the parent sees. Share the form link on the school website, WhatsApp or social media.

1 The parent opens the school's **Admission Enquiry** page (the link shown under **Public Form**).



The public Admission Enquiry page carries the school's name, logo and contacts.

2 The parent types **Student's Name**: Vivaan Kumar, picks **Class Applying For**: Class Nursery and types **Parent / Guardian Name**: Rajiv Ranjan Kumar.

3 The parent types **Mobile Number**: 9876543518, **Email**: rajiv.kumar78@gmail.com and picks **Date of Birth**: 09-06-2022.

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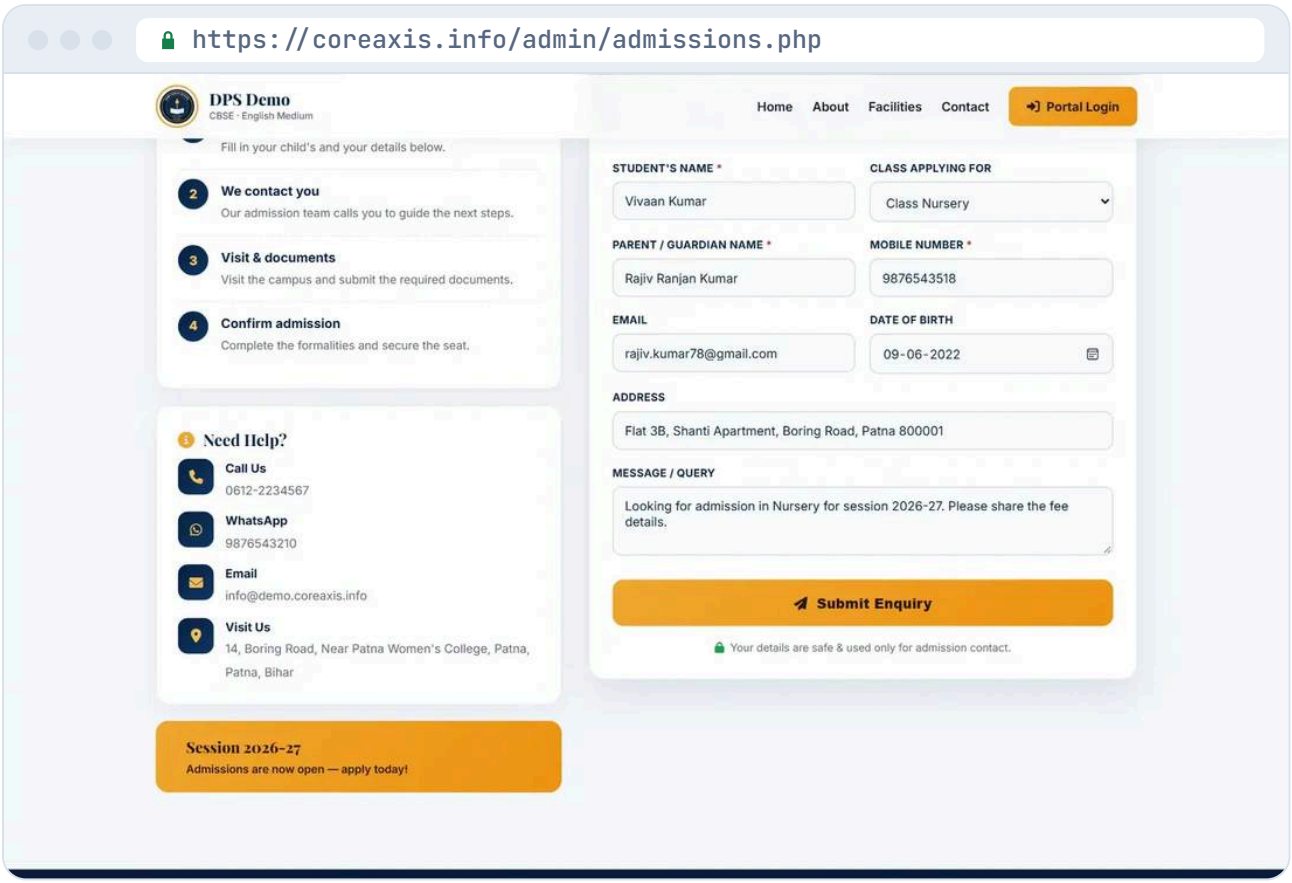
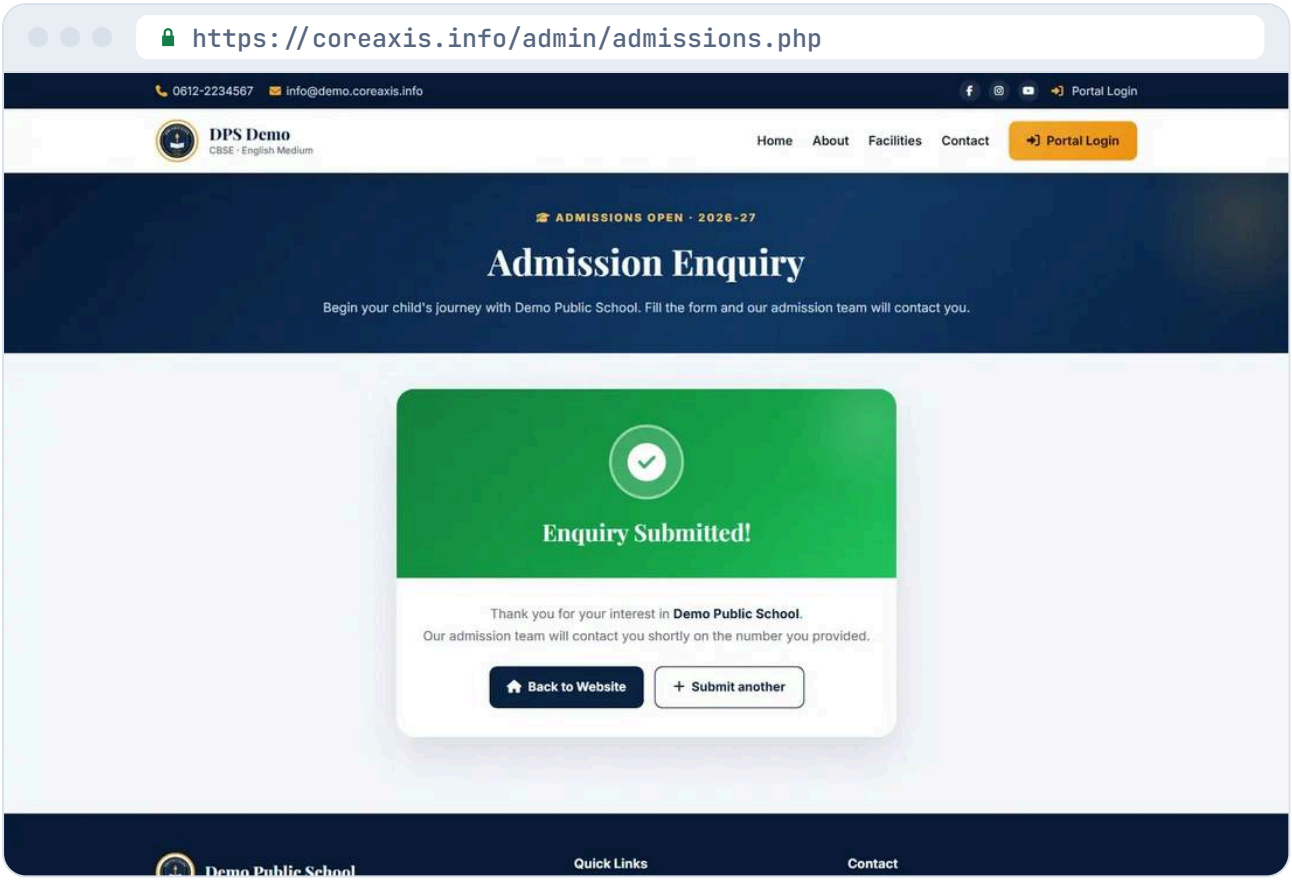
4 The parent types the **Address** and a **Message / Query**, for example a request for fee details.



Fields marked * are required.

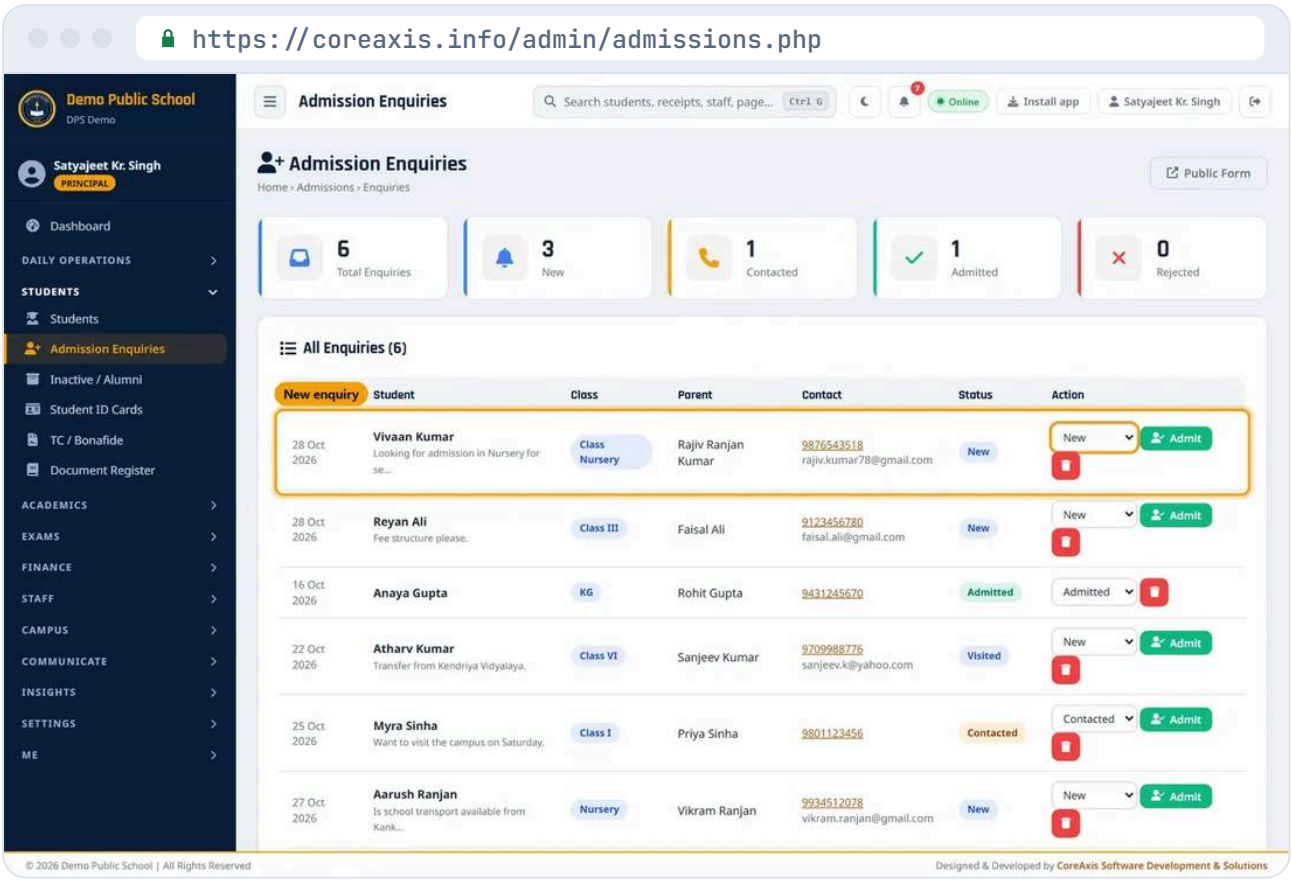
5 The parent clicks **Submit Enquiry**. The page shows **Enquiry Submitted!**



The parent is told the admission team will call.

Follow up an enquiry (example: mark Vivaan Kumar as Contacted)

1. In the sidebar open **Students** and click **Admission Enquiries**. The newest enquiry is at the top with the status **New**.



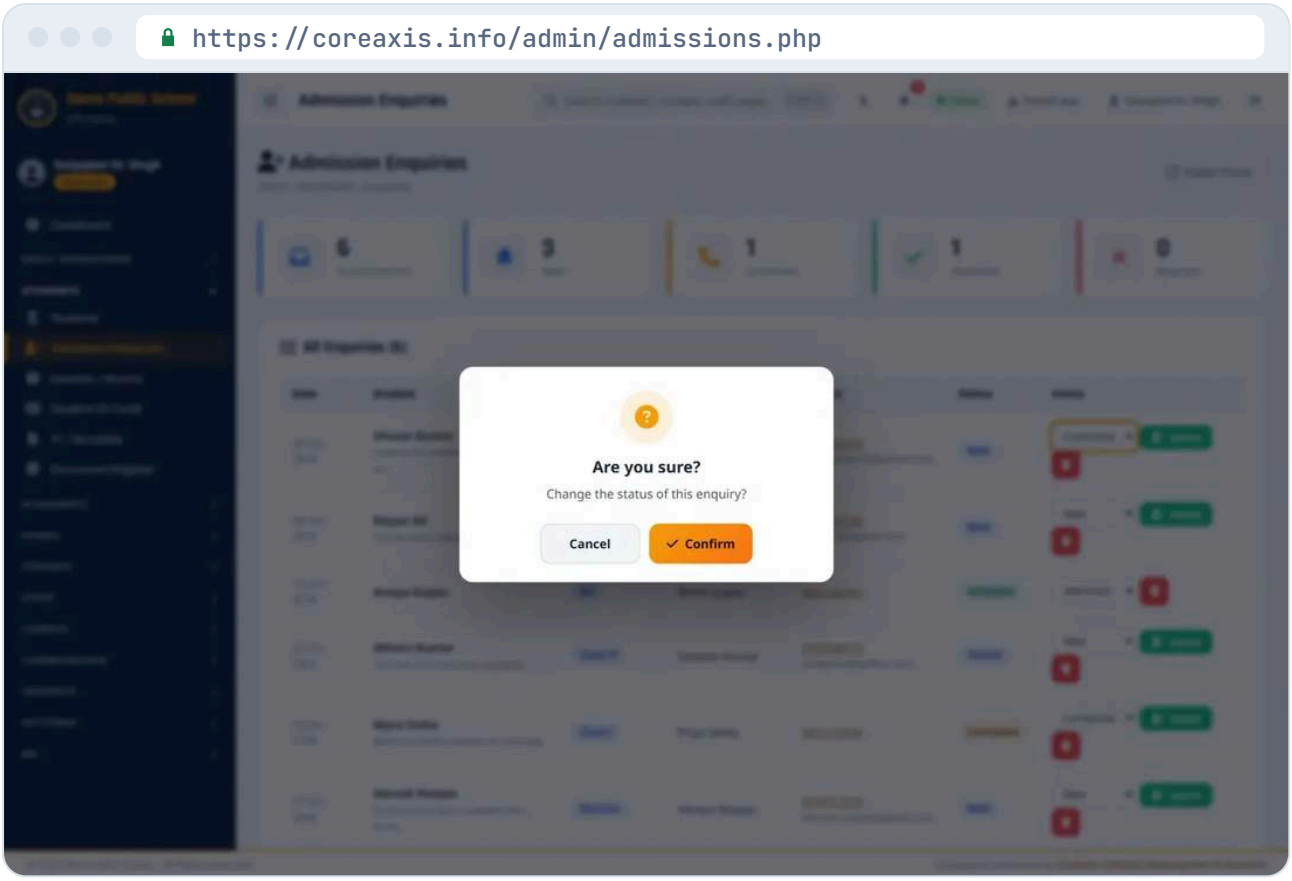
Vivaan Kumar's enquiry, received today.

2. Read the row: date, student and the start of the message, class, parent, phone and email. Point at the message to read it in full.

3. Call the parent. Click the phone number to dial it from a phone.

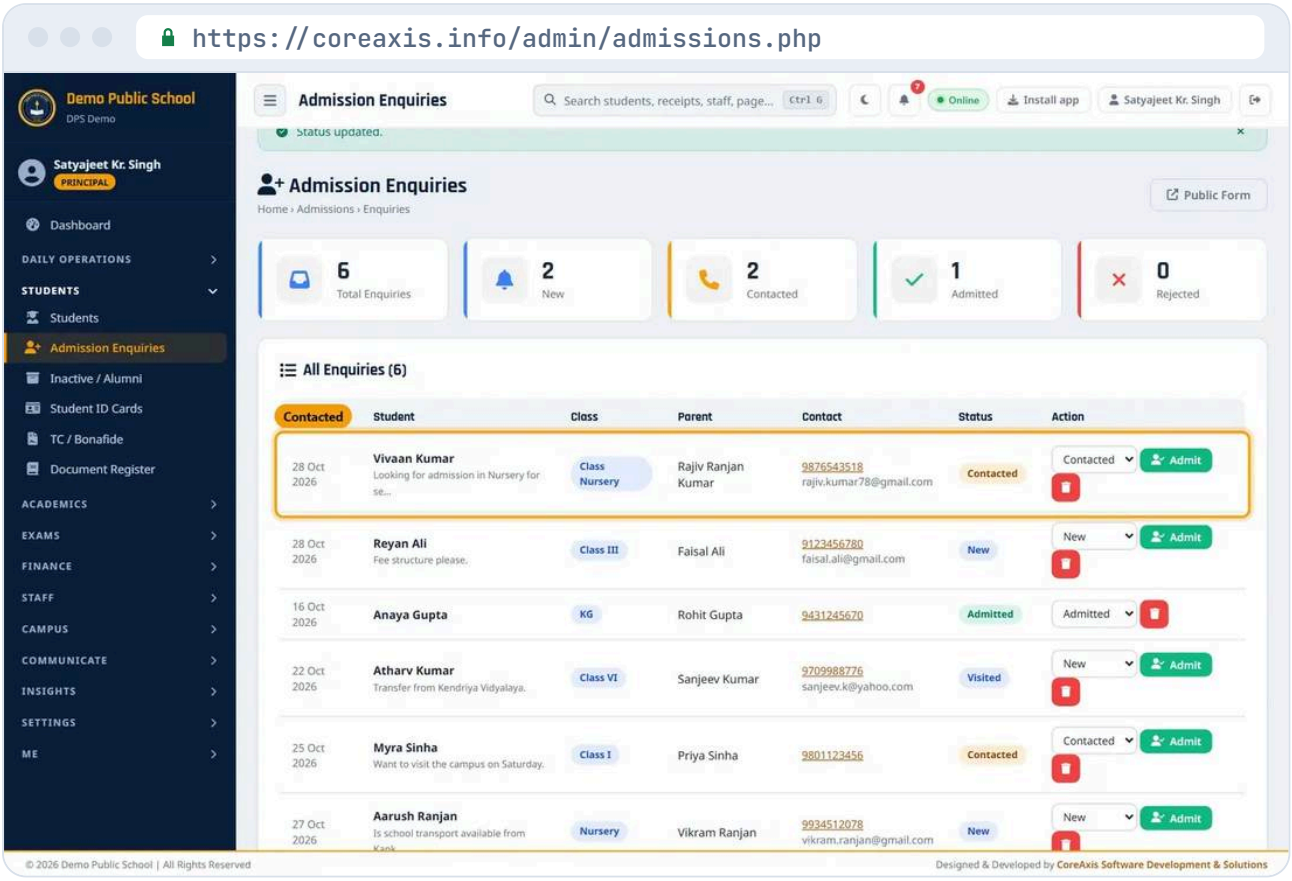
4. In the **Action** column change the status box from **New** to **Contacted**.

5 Click **Confirm** in the popup.



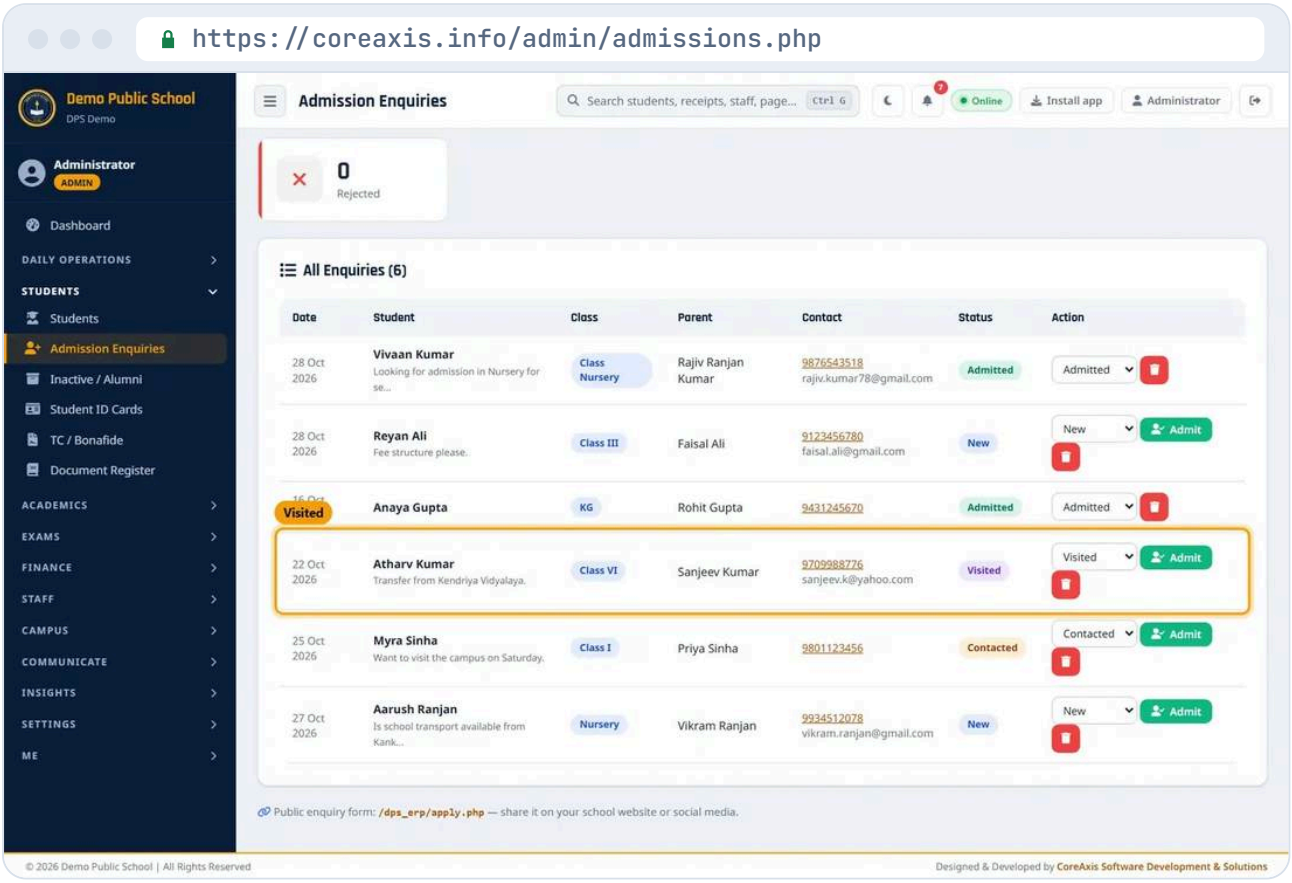
Each status change asks for confirmation.

6 The message **Status updated.** appears and the badge turns to **Contacted**.



Status is now Contacted.

7 When the family comes to see the school, change the status to **Visited** the same way (example: Atharv Kumar, Class VI, who visited after a transfer from Kendriya Vidyalaya). The **Visited** card counts these enquiries.



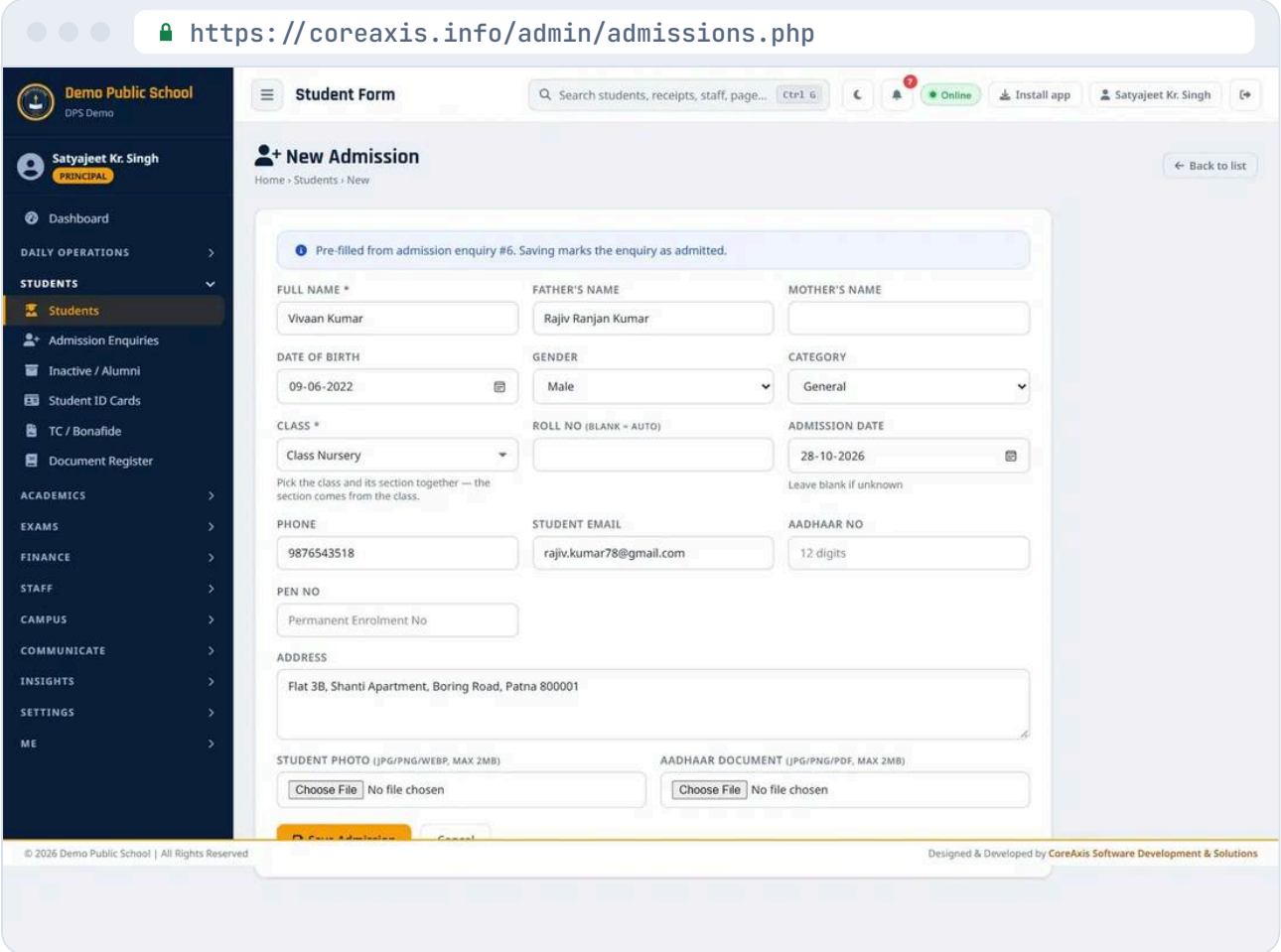
Atharv Kumar's enquiry with the purple Visited badge.

TIP Choose **Rejected** when the family does not take admission. Rejected enquiries stay in the list for the record.

TIP Click a count card at the top (New, Contacted, Visited, Admitted, Rejected) to list only those enquiries; **Show All** clears the filter.

Admit from an enquiry (example: Vivaan Kumar into Class Nursery)

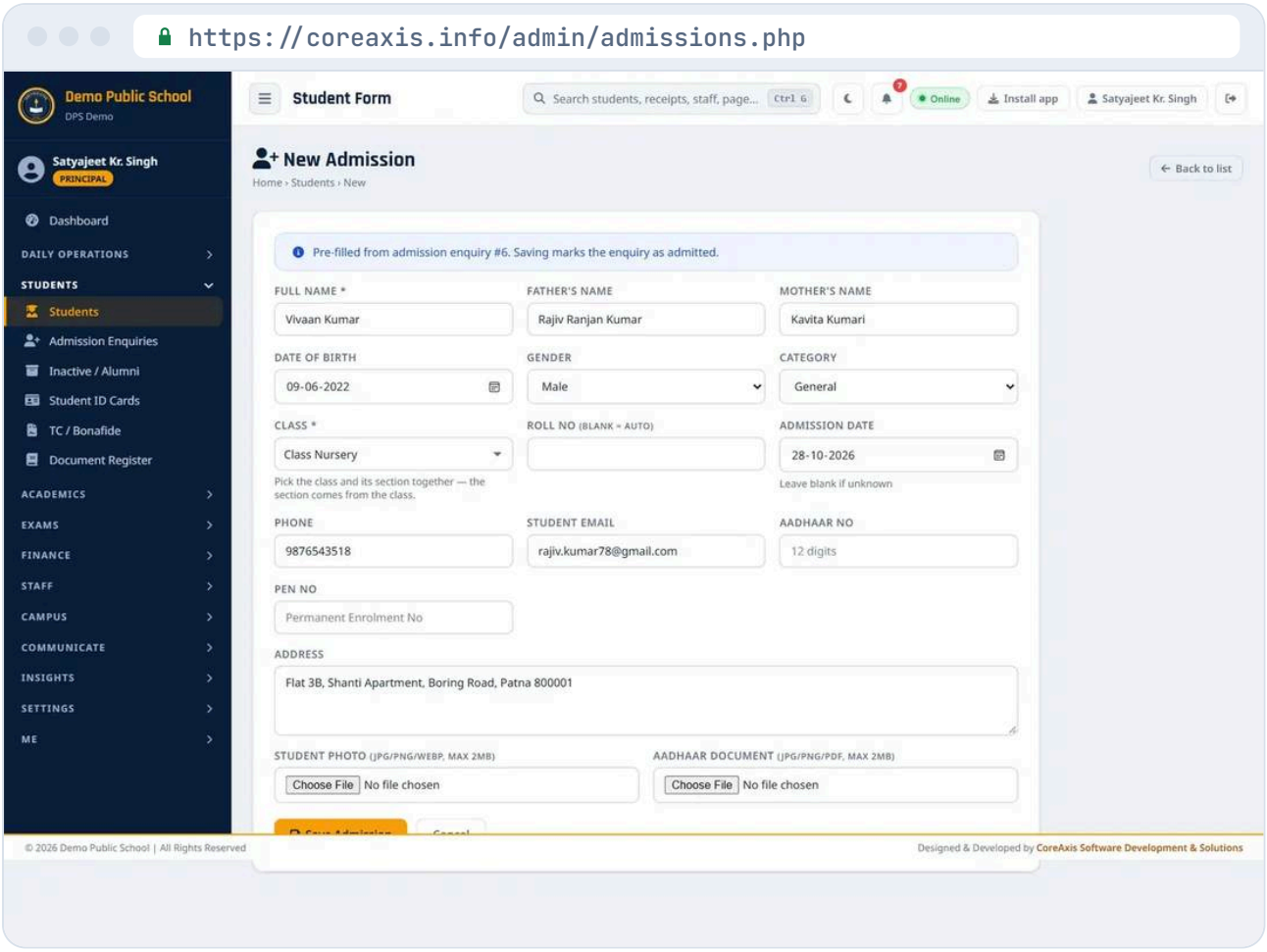
1. On the enquiry row click **Admit**. The **New Admission** form opens with the message **Pre-filled from admission enquiry #6. Saving marks the enquiry as admitted.**



Name, father, date of birth, class, phone, email and address come from the enquiry.

2. Check the filled details. Add what the enquiry does not have: **Mother's Name** Kavita Kumari, **Gender** Male, **Category** General.

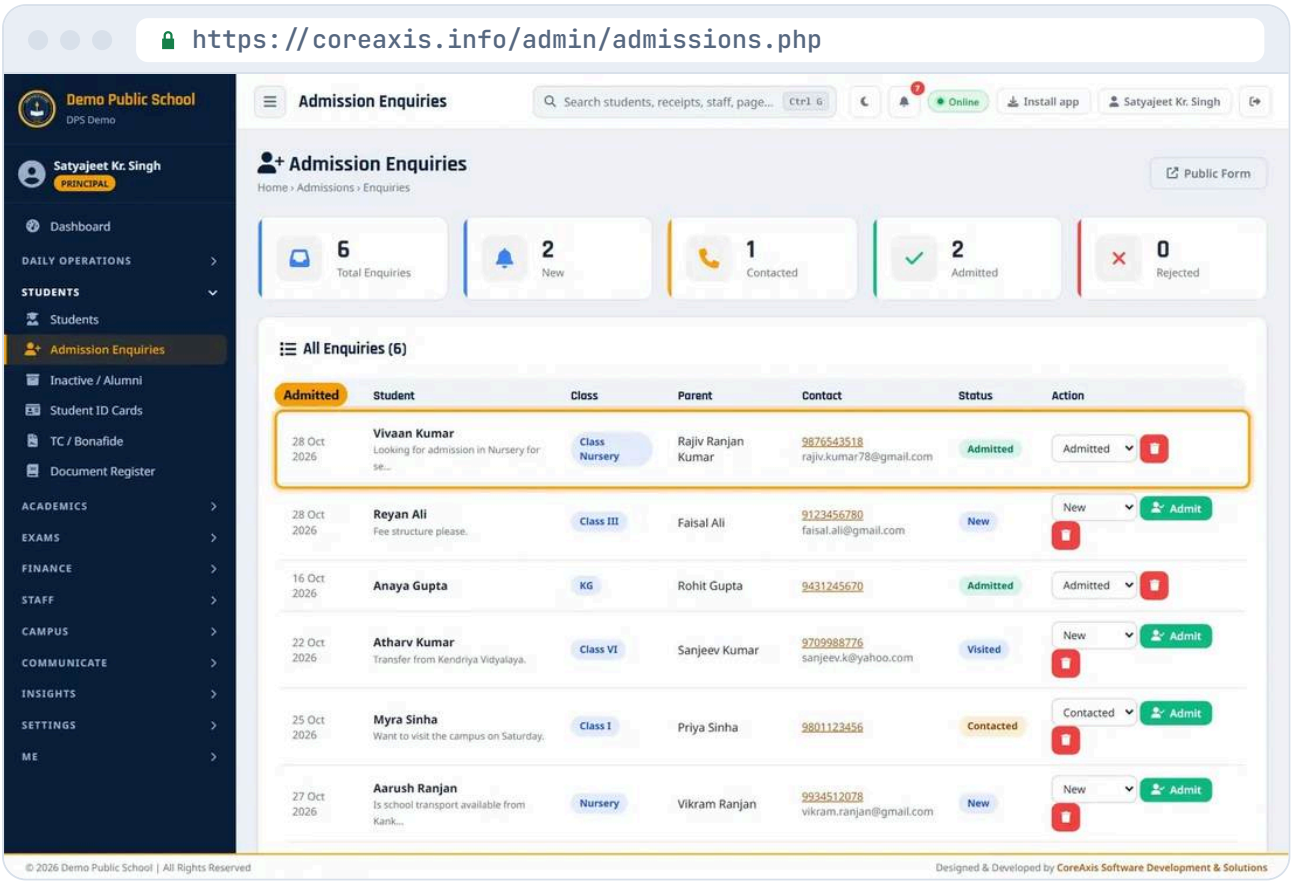
3 Check that **Class** shows **Class Nursery**. Set the **Admission Date** to 28-10-2026.



The form is ready to save.

4 Click **Save Admission** and confirm. The message **Student admitted! Admission No: DPSDEMO20260144** appears.

5 Open **Admission Enquiries** again. The enquiry now shows **Admitted** and the **Admit** button is gone.

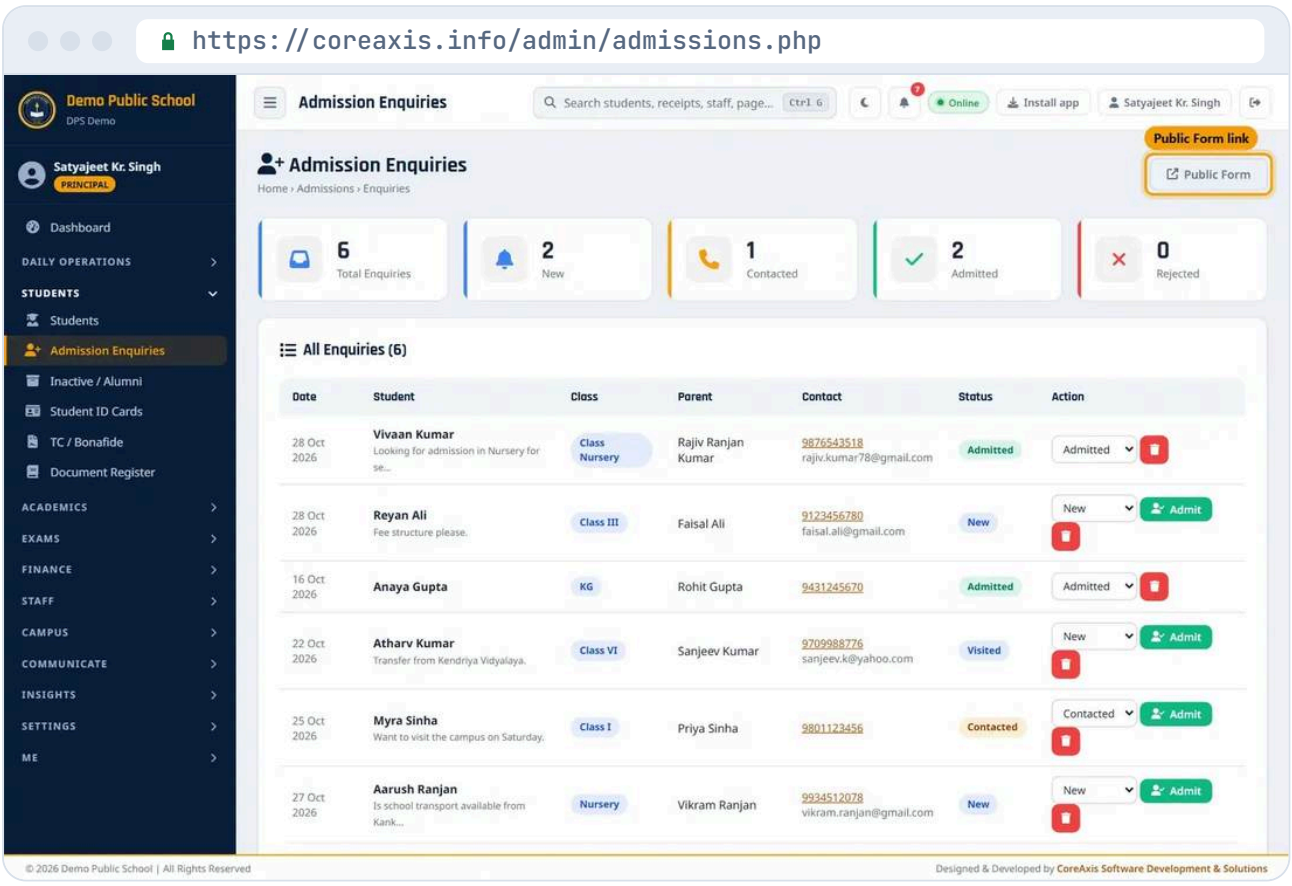


Admitted enquiries cannot be admitted twice.

TIP Choosing **Admitted** in the status box also opens the pre-filled admission form. An enquiry becomes Admitted only after the student record is saved.

Share the enquiry form link

1. Click **Public Form** at the top right to open the parent form in a new tab.



Public Form opens the same page parents see.

2. Copy the link from the browser address bar, or from the line **Public enquiry form:** at the bottom of the page.

3. Paste the link on the school website, in WhatsApp groups or on social media.

Screen at a glance

Total Enquiries	All enquiries ever received. Click to show all.
New / Contacted / Visited / Admitted / Rejected	Count of enquiries in each status. The five cards add up to Total Enquiries. Click a card to filter the list.
Date	When the parent sent the enquiry.
Student	Child's name and the first part of the parent's message.
Class	Class the parent applied for.

Parent / Contact	Parent or guardian name, mobile number (tap to call) and email.
Status	Coloured badge: New (blue), Contacted (amber), Visited (purple), Admitted (green), Rejected (red).
Action	Status box to change the status (New, Contacted, Visited, Admitted, Rejected), **Admit** to open the pre-filled admission form, and the red bin to delete the enquiry (asks twice).

Questions

A parent phoned instead of using the form. How do I record it?

Open Public Form yourself and fill it in for the parent, or admit the child directly from Students › New Admission.

Can I undo Admitted?

The enquiry status can be changed back, but the student record stays. Remove the student from the Students list if the admission was a mistake.

Who can see enquiries?

Admin, Principal and Vice Principal. Accountants and Teachers do not see this menu.

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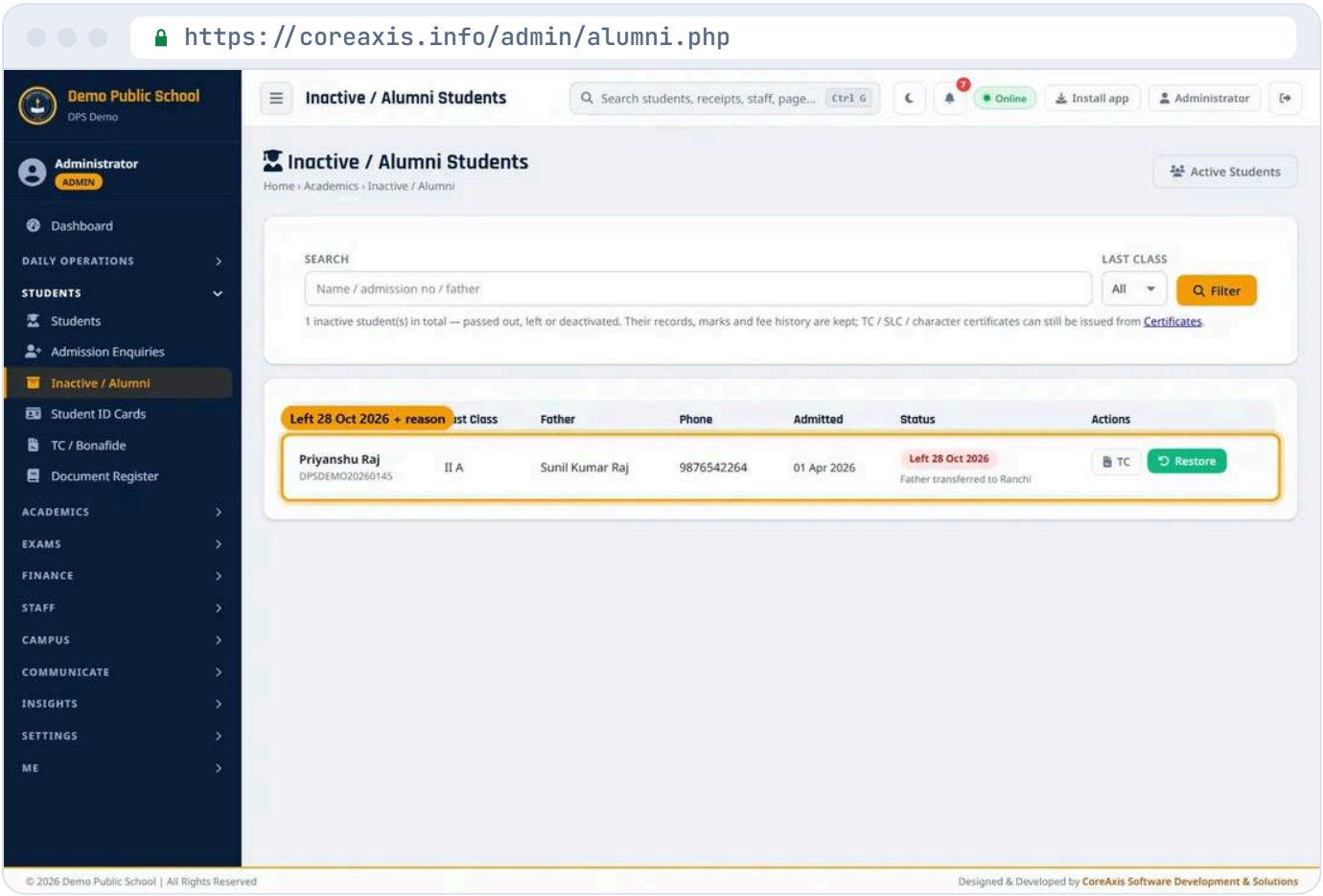
STUDENTS · CHAPTER 6

Inactive / Alumni

Admin Principal MENU Students › Inactive / Alumni

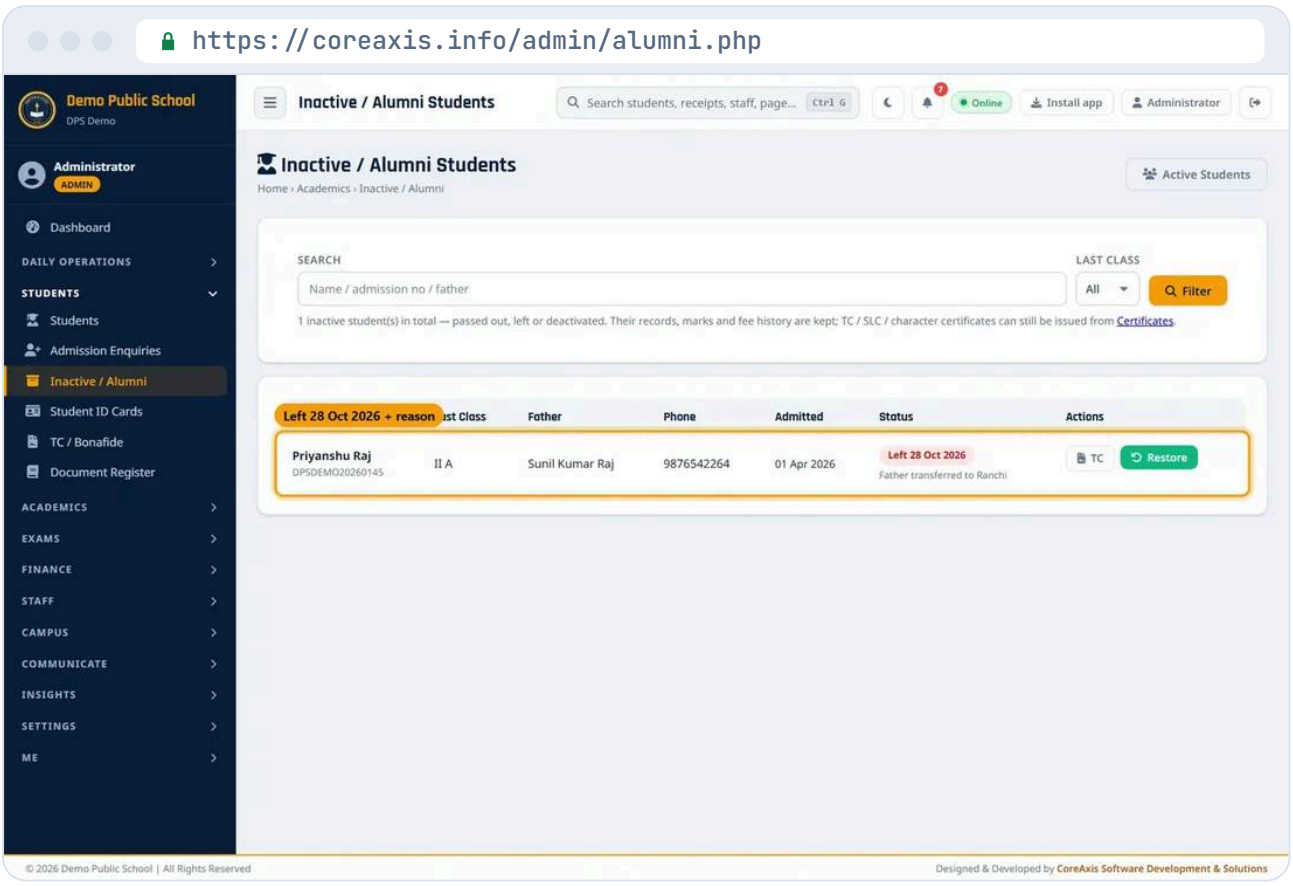
When a student leaves, the record is never deleted. Issuing an original TC or SLC, removing a student from the Students list, or a pass-out at session rollover moves the student here. Their marks, attendance and fee history stay intact, so the office can still issue a TC, SLC or character certificate years later, or bring the student back with Restore.



Inactive / Alumni — Demo Public School

Find a student who has left (example: Priyanshu Raj, left Class II-A with a TC)

1. In the sidebar open **Students** and click **Inactive / Alumni**.



Priyanshu Raj moved here when his original TC was issued: Status shows Left 28 Oct 2026 and the reason, Father transferred to Ranchi.

2. Type a name, admission number or father's name in **Search**, for example Priyanshu.

3. To see only one class, pick it in **Last class**, for example II-A.

4. Click **Filter**. The line under the filter shows how many inactive students there are in total.

5. Read the row: name and admission number, last class, father, phone, admission date and status. **Left <date>** with the reason under it means the student left with an original TC or SLC (Priyanshu Raj: Left 28 Oct 2026, Father transferred to Ranchi). **Passed out Mon YYYY** means the student finished the last class at session rollover; **Inactive** means removed from the Students list.

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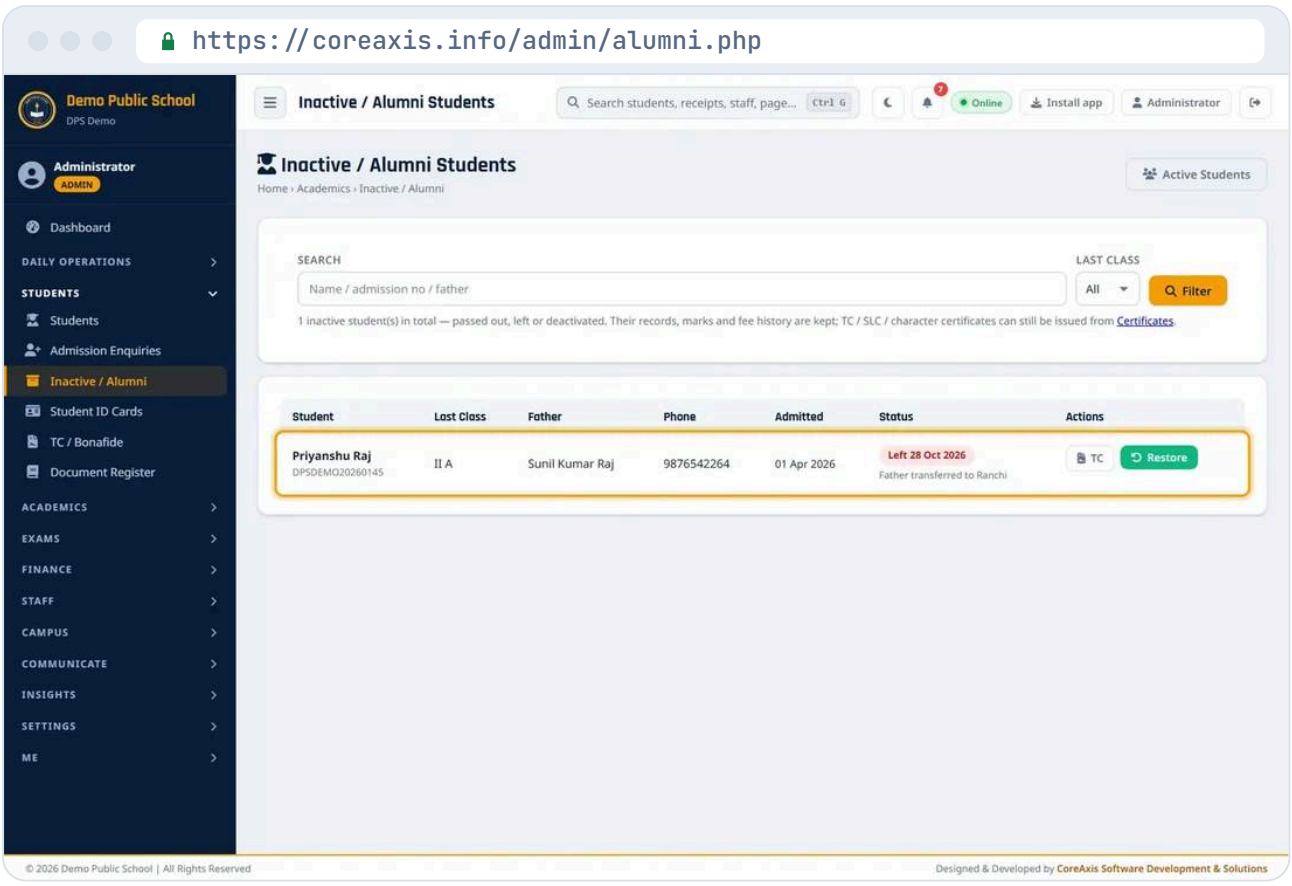
Issue a TC to a student who has already left

1. Find the student in the list.



Each row has TC and Restore.

2. Click **TC**. The **Student Certificates** page opens with Transfer Certificate and the student already selected.

3. Fill the leaving details and click **Preview & Issue**, as described in the TC / Bonafide chapter.

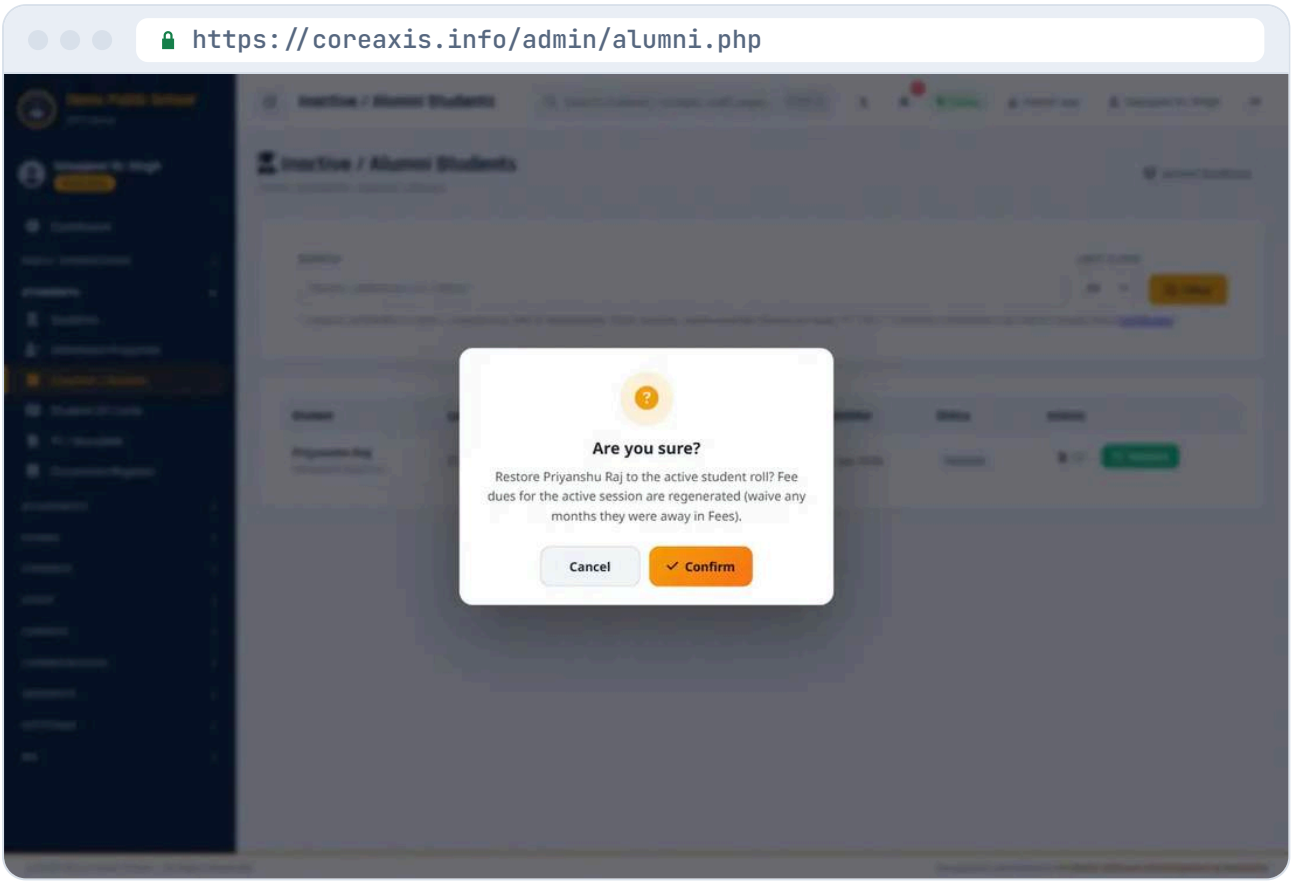
> **TIP** A student who already has an original TC gets a DUPLICATE COPY on the next issue. The Document Register keeps every copy.

Restore a student to the active roll

Use Restore when a student was removed by mistake or comes back to the school.

1. Find the student and click **Restore**.

2 Read the popup. It says the fee dues for the active session are regenerated, and that any months the student was away must be waived in Fees.



Restore asks for confirmation.

3 Click **Confirm**. The message **Student restored to the active roll** appears and the student is back in Students.

4 Open the student in **Students**, click **Edit** and check the class and roll number before the next attendance.

IMPORTANT Restore is refused when the plan's student limit is reached. Upgrade the plan first. A student who left with an original TC should normally not be restored; admit them again only if they really rejoin.

Screen at a glance

Active Students	Button back to the Students list.
Search / Last class / Filter	Search by name, admission number or father; filter by the class the student was last in.

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Student	Name and admission number.
Last Class	Class and section when the student left.
Father / Phone / Admitted	Contact details and the original admission date.
Status	Left <date> with the reason for leaving (from the original TC / SLC), Passed out (with month and year), or Inactive (removed from the Students list).
Actions	**TC** opens the TC form for the student; **Restore** returns the student to the active roll.

Questions

Why can I not see a student here after issuing a Bonafide certificate?

Only an original TC or SLC marks a student Left. Bonafide and character certificates do not change the student's status.

Are the fees of an inactive student still counted as dues?

No. Inactive students are not billed for new months and are not listed as defaulters.

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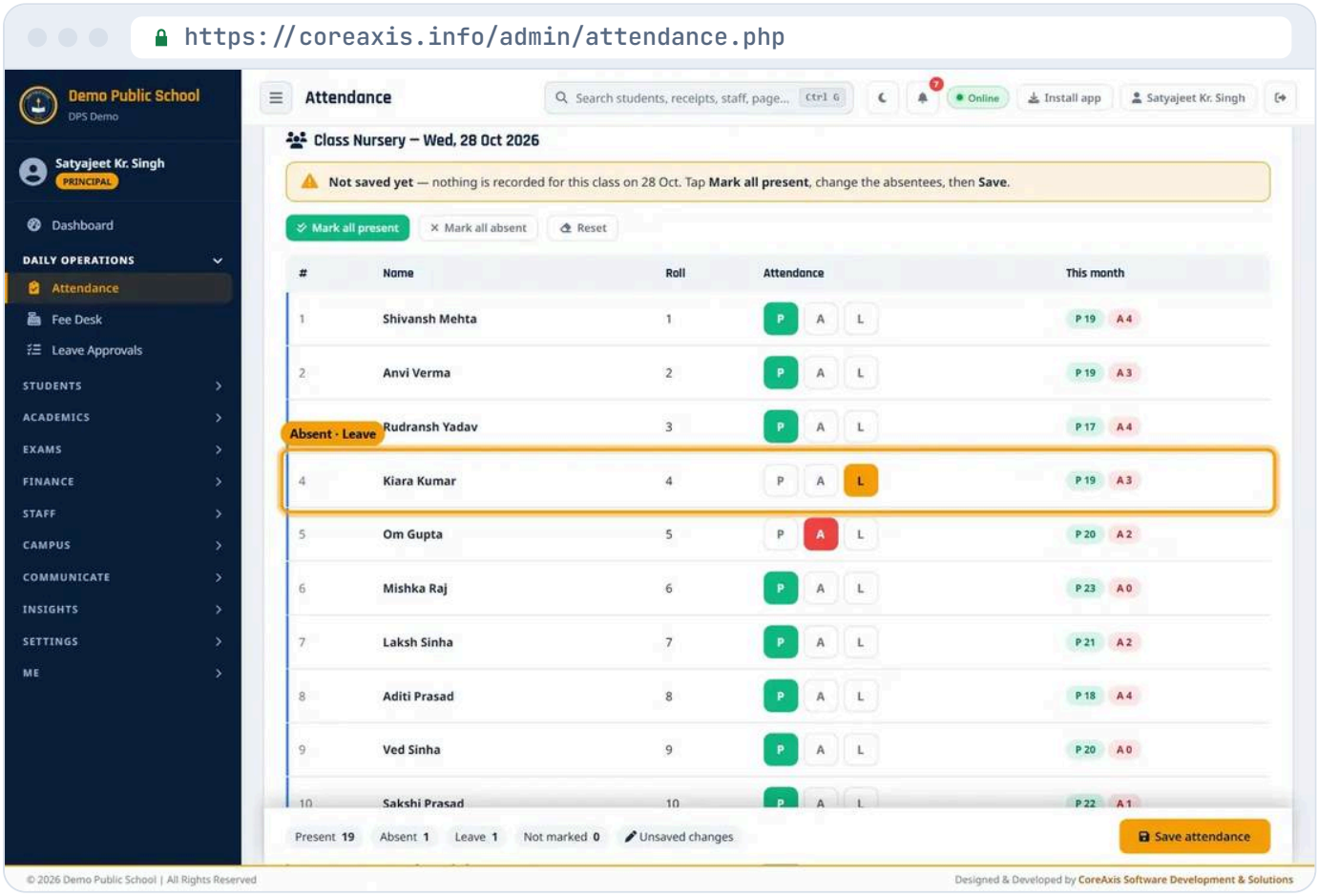
STUDENTS · CHAPTER 7

Student Attendance

Admin Principal Teacher

MENU Daily Operations › Attendance · Academics › Attendance Register (Teacher: My Class)

Attendance is marked once a day for each class. Start with Mark all present, change the few absentees, and save. Parents of students newly marked absent get an SMS when the school has SMS alerts on. The Dashboard shows which classes are still unmarked, the parent portal shows each child's attendance, and the Attendance Register gives the month grid for printing. Teachers mark only the classes assigned to them.

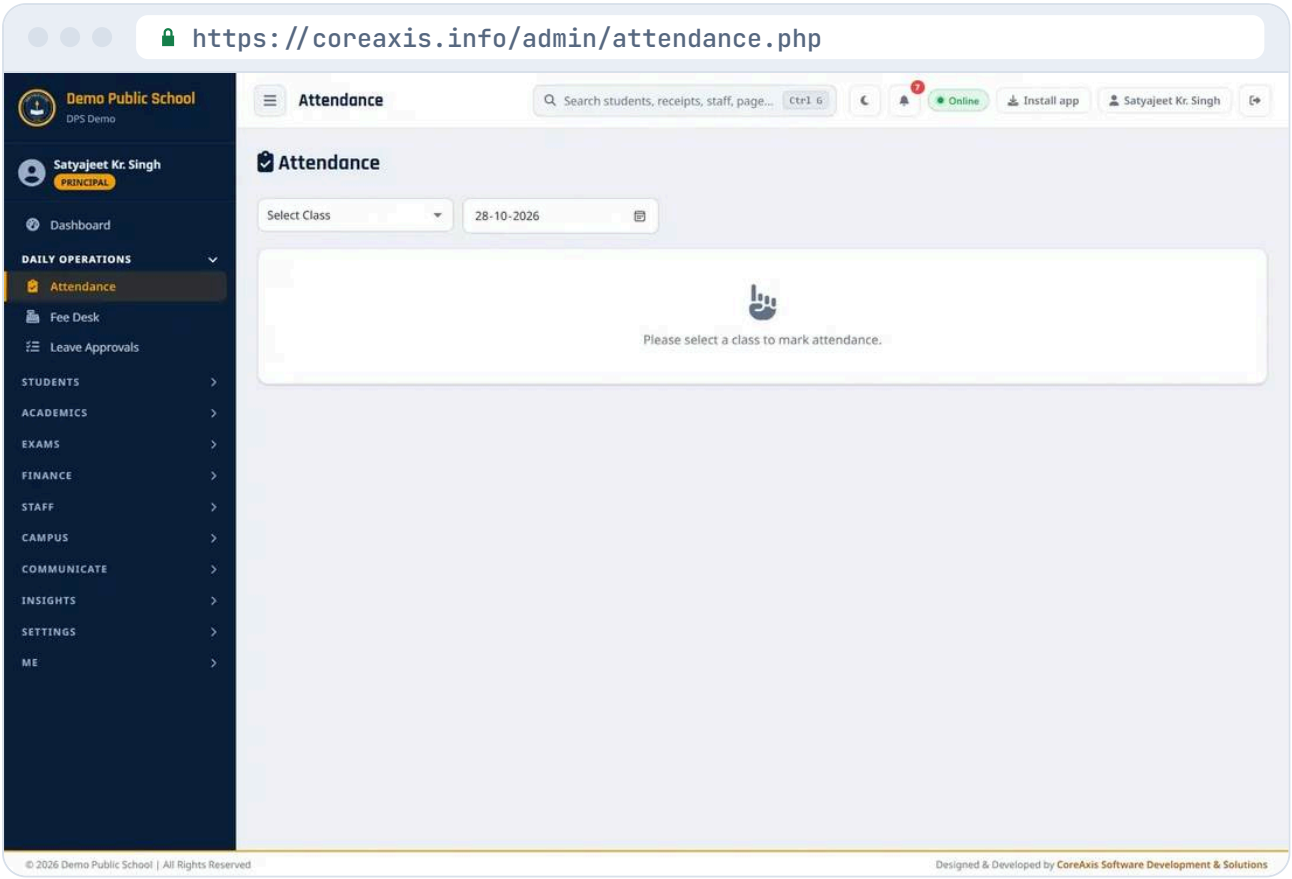


Student Attendance — Demo Public School

Mark today's attendance (example: Class Nursery, Wednesday 28 Oct 2026)

The Dashboard showed Class Nursery and Class III as not marked yet. Clicking the Class Nursery chip there opens the same page.

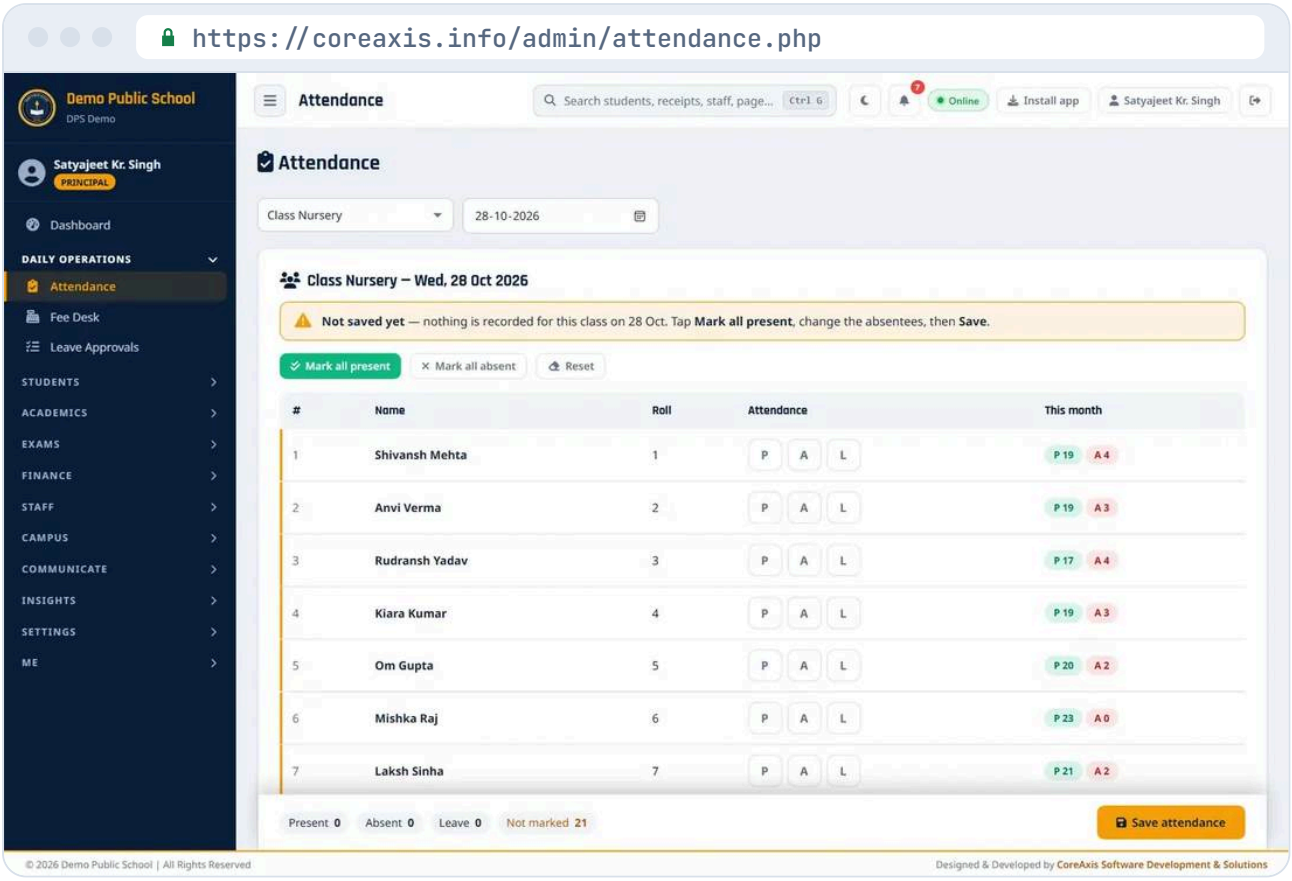
1 In the sidebar open **Daily Operations** and click **Attendance**.



Pick a class to start.

2 Pick the class in **Select Class**: **Class Nursery**. The date is today; change it only to mark or correct another day.

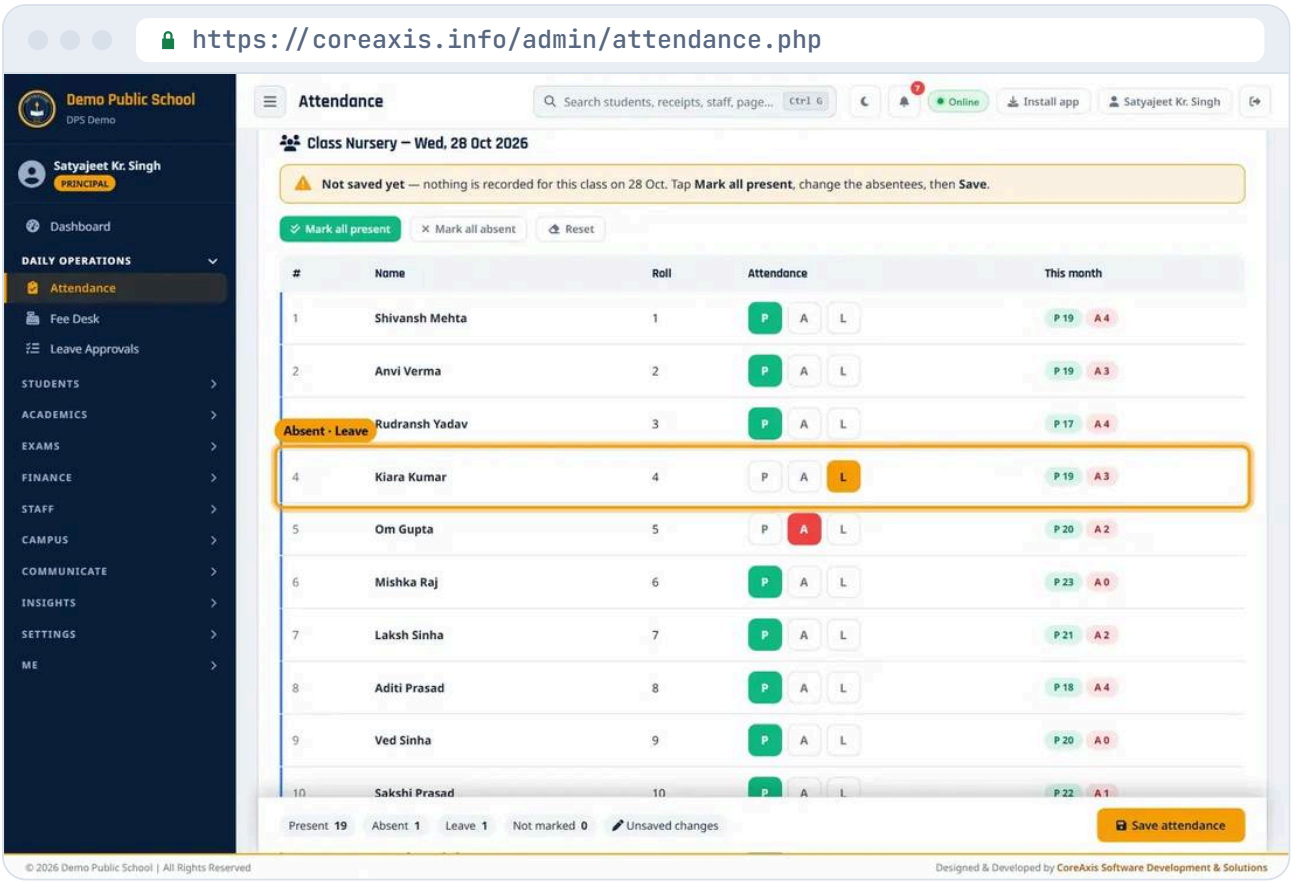
3 The yellow box says **Not saved yet** — nothing is recorded for this class today.



Unmarked students have a yellow edge.

4 Click **Mark all present**. Every student turns green **P**.

5 Change the absentees: click **A** for Om Gupta (absent) and **L** for Kiara Kumar (on leave).

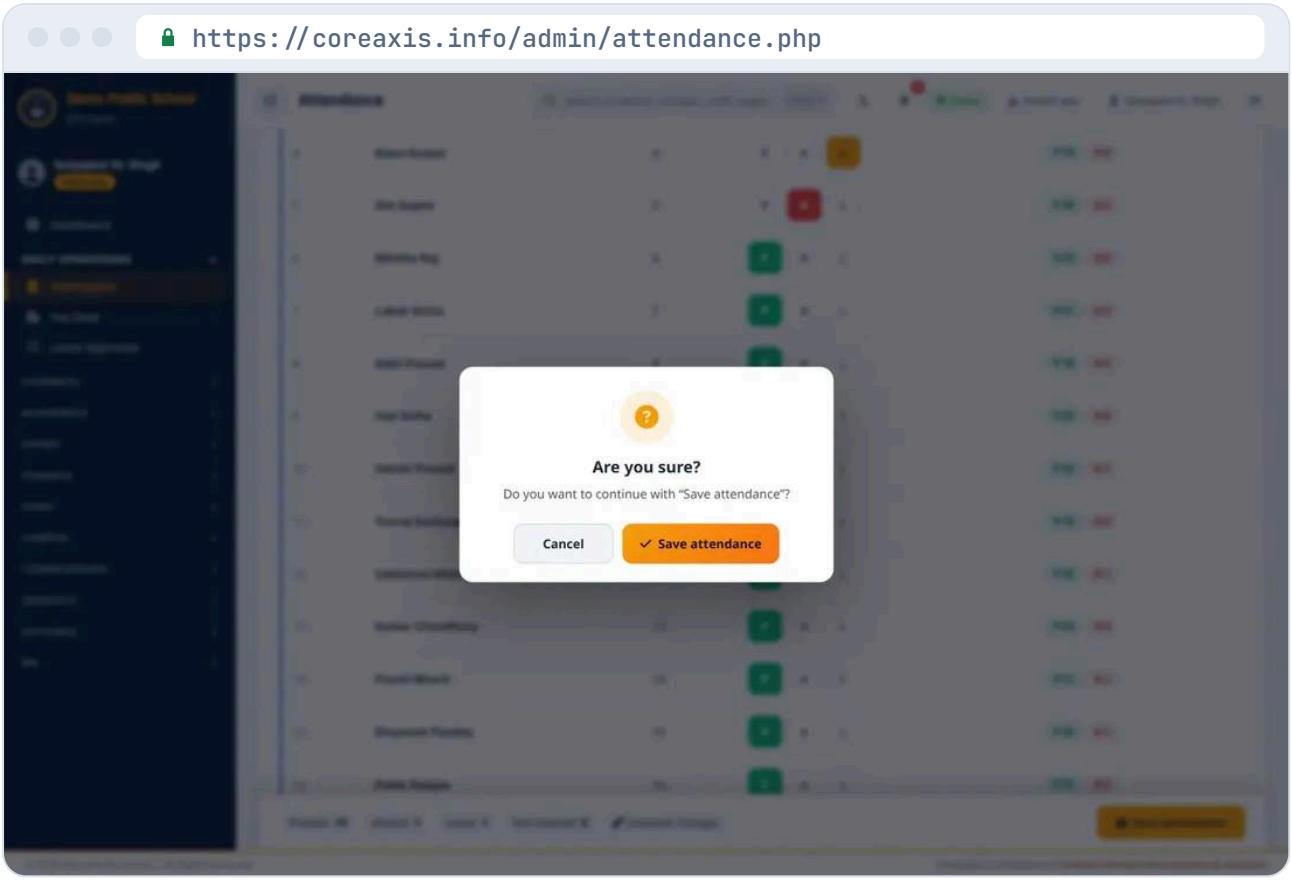


P = Present, A = Absent, L = Leave. The This month column shows each child's P and A so far.

6 Check the counts at the bottom: **Present 19**, **Absent 1**, **Leave 1**, **Not marked 0**. **Unsaved changes** reminds you to save.

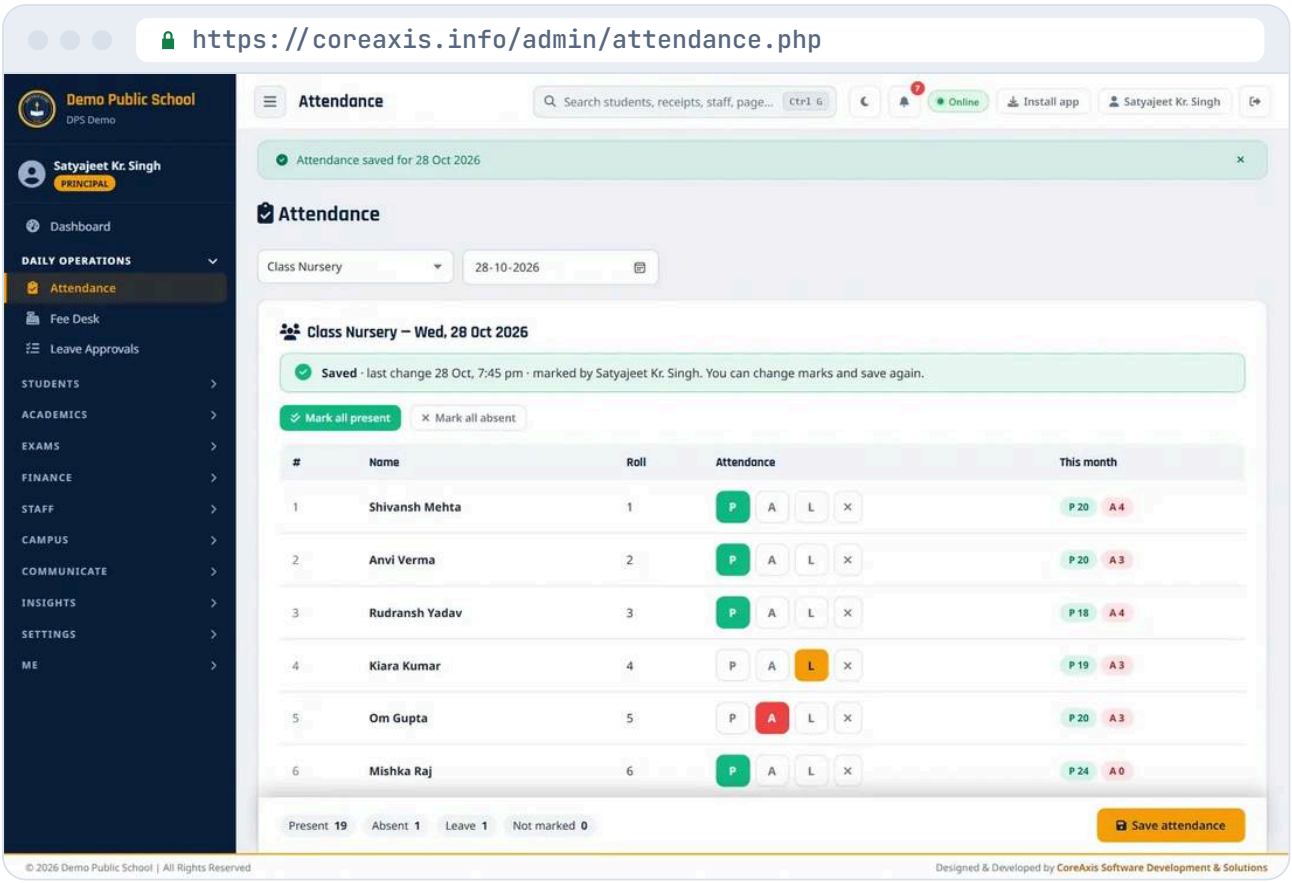
The counts bar stays at the bottom of the screen.

7 Click **Save attendance**, then **Save attendance** again in the popup.



Saving asks once for confirmation.

8 The message **Attendance saved for 28 Oct 2026** appears and the green box shows **Saved**, the time and who marked it.



Saved by Satyajeet Kr. Singh.

TIP To correct a mark later, open the same class and date, change the mark and click **Save attendance** again. The x button next to a mark clears it.

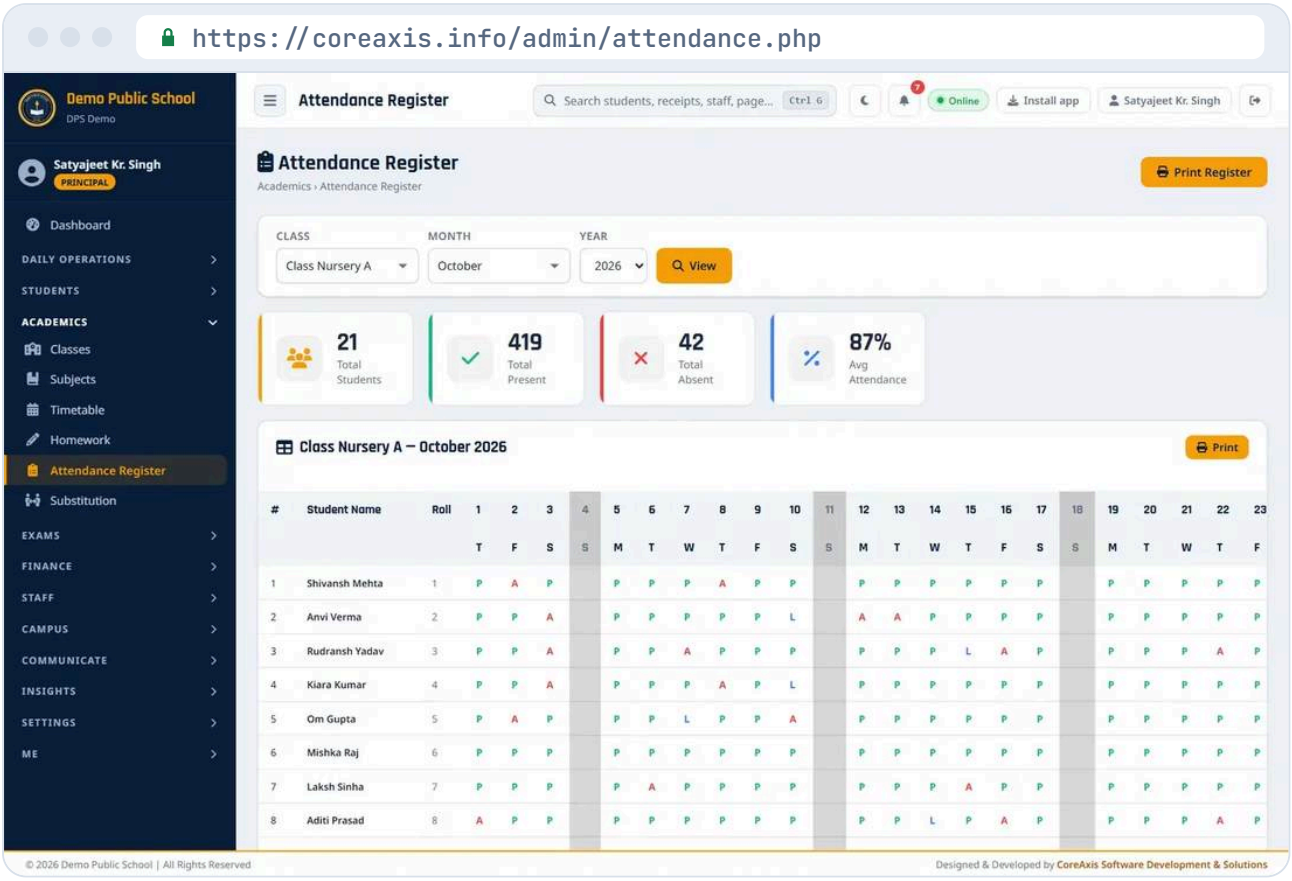
TIP On a Sunday or a holiday from the Holiday Calendar the page shows a notice; days marked H are holidays.

TIP An absent SMS goes only to students newly marked absent, so saving twice does not send a second SMS.

View the monthly Attendance Register (example: Class Nursery A, October 2026)

1 In the sidebar open **Academics** and click **Attendance Register**.

2 Pick **Class**: Class Nursery A, **Month**: October and **Year**: 2026, and click **View**.



Month grid: one row per student, one column per day; Sundays are greyed.

3 Read the four cards: **Total Students**, **Total Present**, **Total Absent** and **Avg Attendance**.

4 Scroll right to see the student's **P**, **A**, **L** totals and attendance **%** for the month.

5 Click **Print Register** (or **Print** on the table) to print the register on A4 landscape.

TIP Teachers see the register only for their own classes.

Screen at a glance

Select Class / date	Class to mark and the attendance date (today by default).
Status box	Yellow **Not saved yet**, or green **Saved** with last change time and who marked it; also warns if some students are not marked.
Mark all present / Mark all absent / Reset	Set every student at once; Reset clears unsaved marks (only before the first save).

#, Name, Roll	Students of the class in roll order.
Attendance	P (Present, green), A (Absent, red), L (Leave, amber); H (Holiday, blue) appears for holiday-marked days.
This month	Days present and absent so far this month.
Counts bar	Present, Absent, Leave, Not marked, Unsaved changes, and **Save attendance**.
Register cards	Total Students, Total Present, Total Absent, Avg Attendance for the month.
Register grid	Day-by-day marks with weekday letters, then P, A, L totals and % per student.

Questions

A parent applied for leave in the portal. Do I still mark L?

Yes. Leave applications are decided in Daily Operations › Leave Approvals; the attendance mark for each day is still made here.

The Dashboard still shows a class as not marked.

The class is counted as marked only after Save attendance. Open the class and check for the green Saved box.

Can I mark attendance from a phone?

Yes. On a phone the list shows one student per row with large P / A / L buttons, and the Save bar stays at the bottom.

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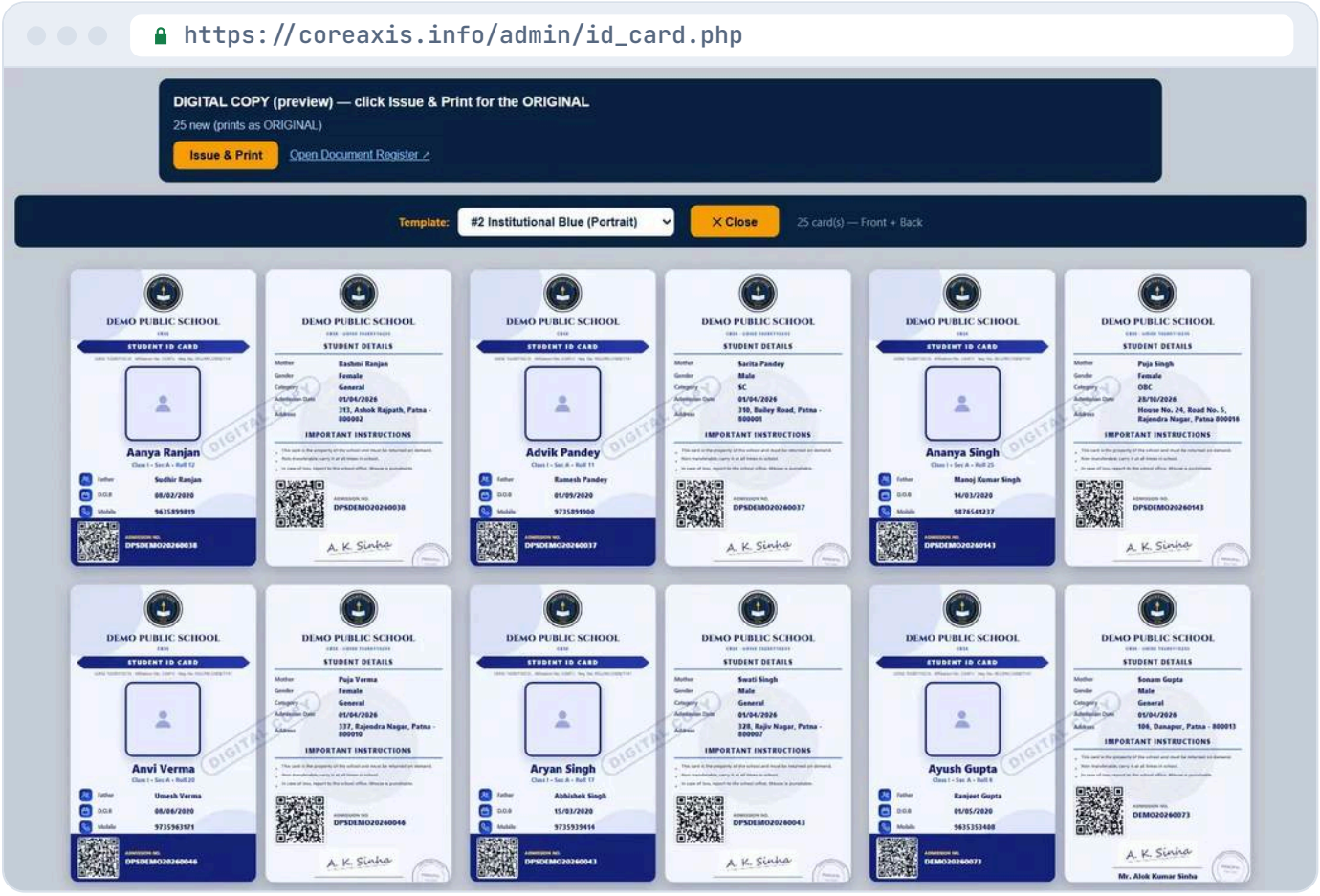
STUDENTS · CHAPTER 8

Student ID Cards

Admin | Principal | Teacher

MENU Students › Student ID Cards (Teacher: Cards & Certificates › Student ID Cards)

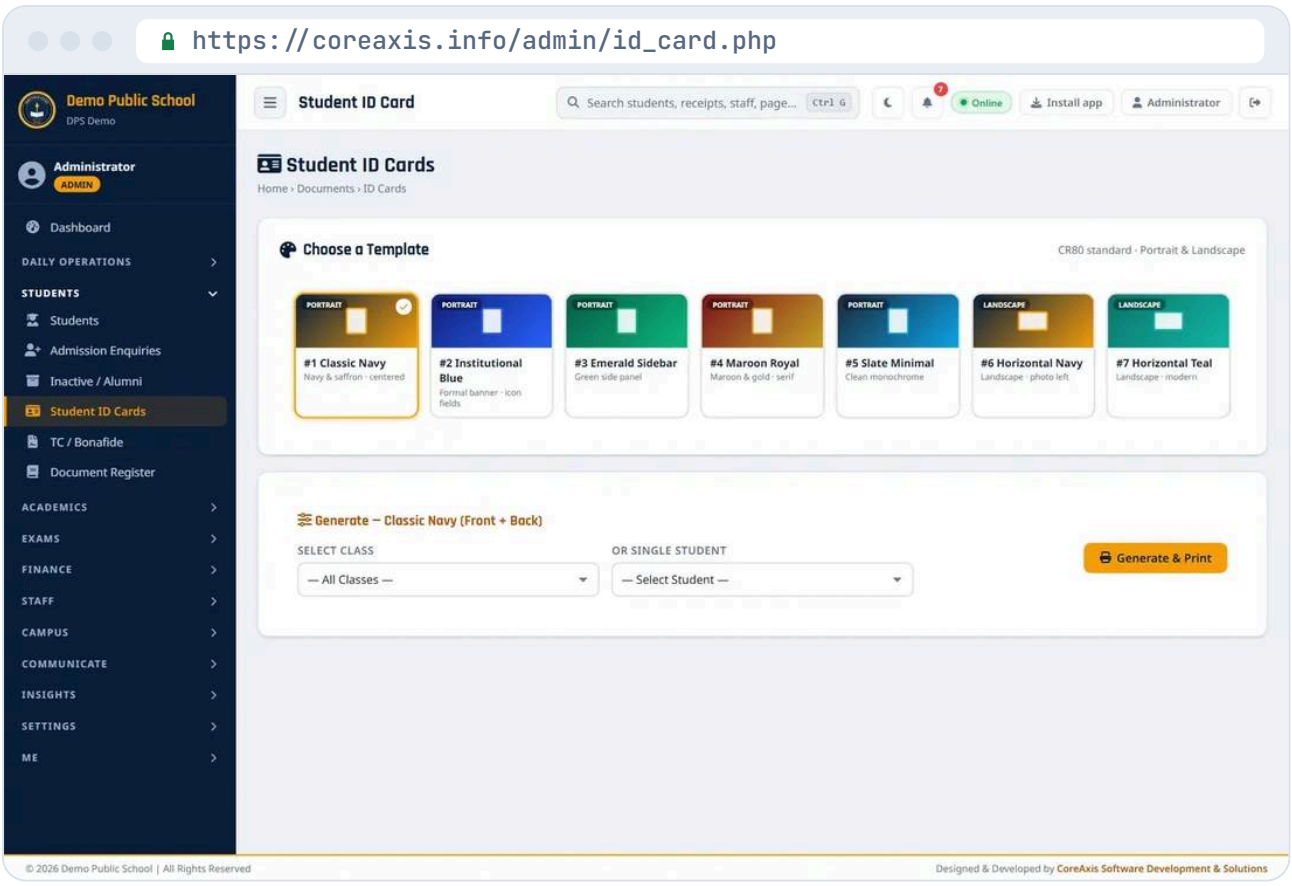
Student ID Cards prints identity cards in the standard CR80 size (the size of a bank card), front and back, with the school logo, photo, class, roll number, father's name, date of birth, mobile, address, admission number and a QR code. Names and details come from the student record and the School Profile, so nothing is typed here. Like certificates, cards open as a preview and are recorded in the Document Register only when you click Issue & Print.



Student ID Cards — Demo Public School

Print ID cards for a class (example: Class I-A, Institutional Blue design)

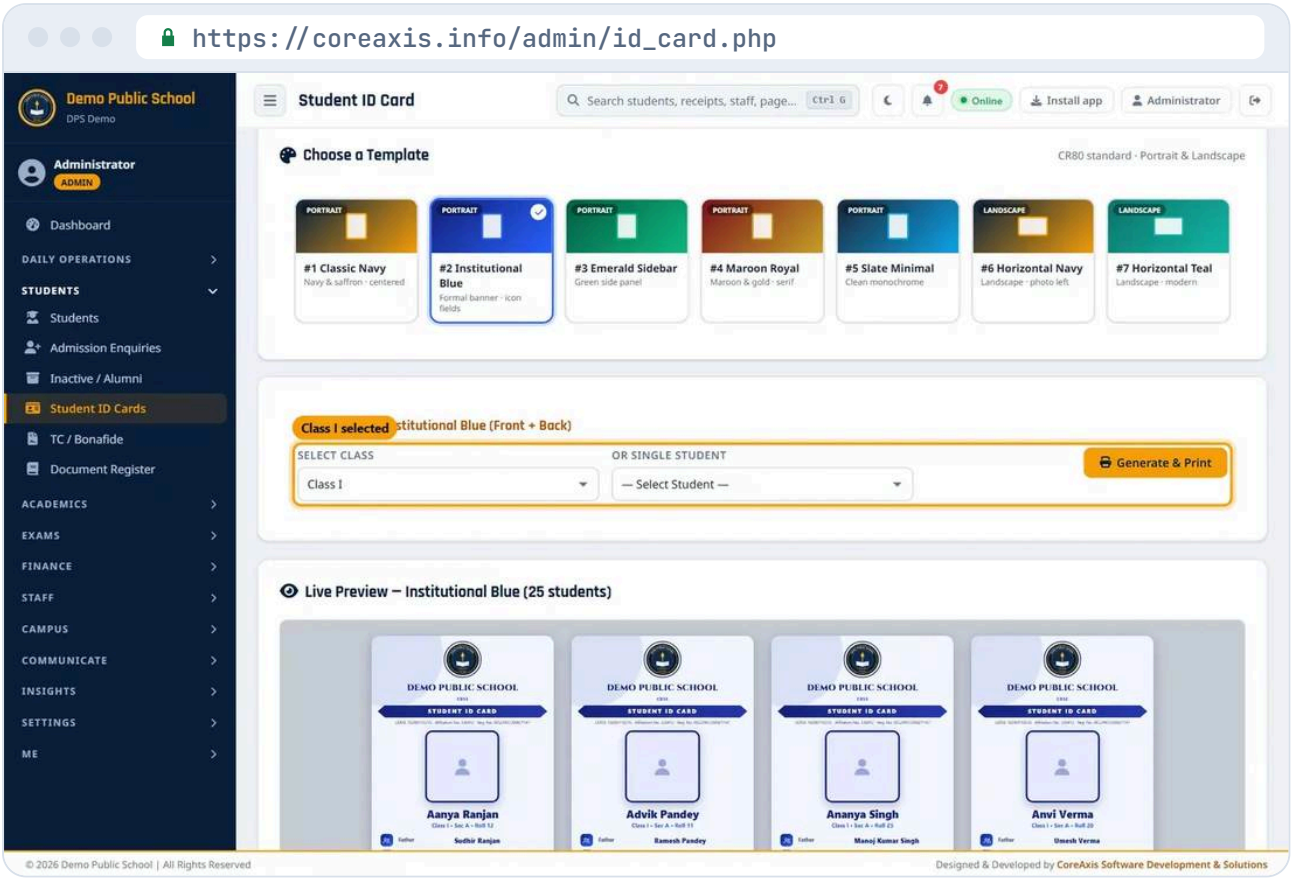
1 In the sidebar open **Students** and click **Student ID Cards**.



Seven designs: five portrait, two landscape.

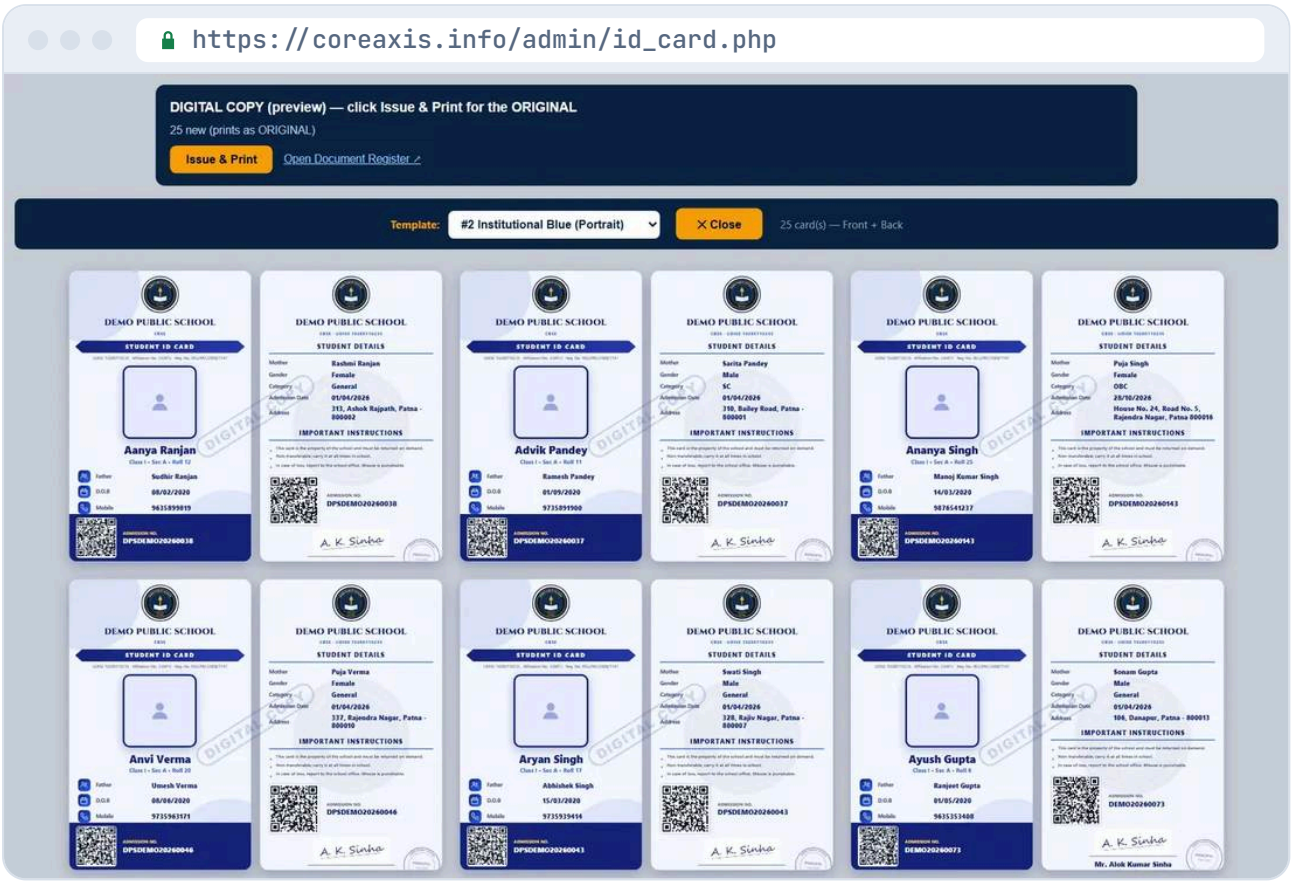
2 Under **Choose a Template** click a design, for example **#2 Institutional Blue**. A tick marks the chosen design.

3 In **Select Class** pick **Class I**. A **Live Preview** of the class's cards appears below.



Class I selected; 25 cards in the preview.

4 Click **Generate & Print**. The cards open in a new tab, front and back side by side, marked DIGITAL COPY.



25 new cards (prints as ORIGINAL).

5 To try another design, change **Template** in the top bar of the preview.

6 Click **Issue & Print**. The cards are logged in the Document Register and the print bar appears.

7 Click **Print**. In the print window choose your card printer or A4 paper and print both sides.

TIP Add or change student photos in Students › Edit (**Student Photo**) before printing. A card without a photo shows a blank silhouette.

TIP The school logo, address, UDISE / affiliation numbers and the principal's signature and stamp come from Settings › School Profile.

Print one student's card (example: Ananya Singh, new admission)

1 Pick the design, then pick the student in **Or Single Student**, for example Ananya Singh (DPSDEMO20260143) — I.

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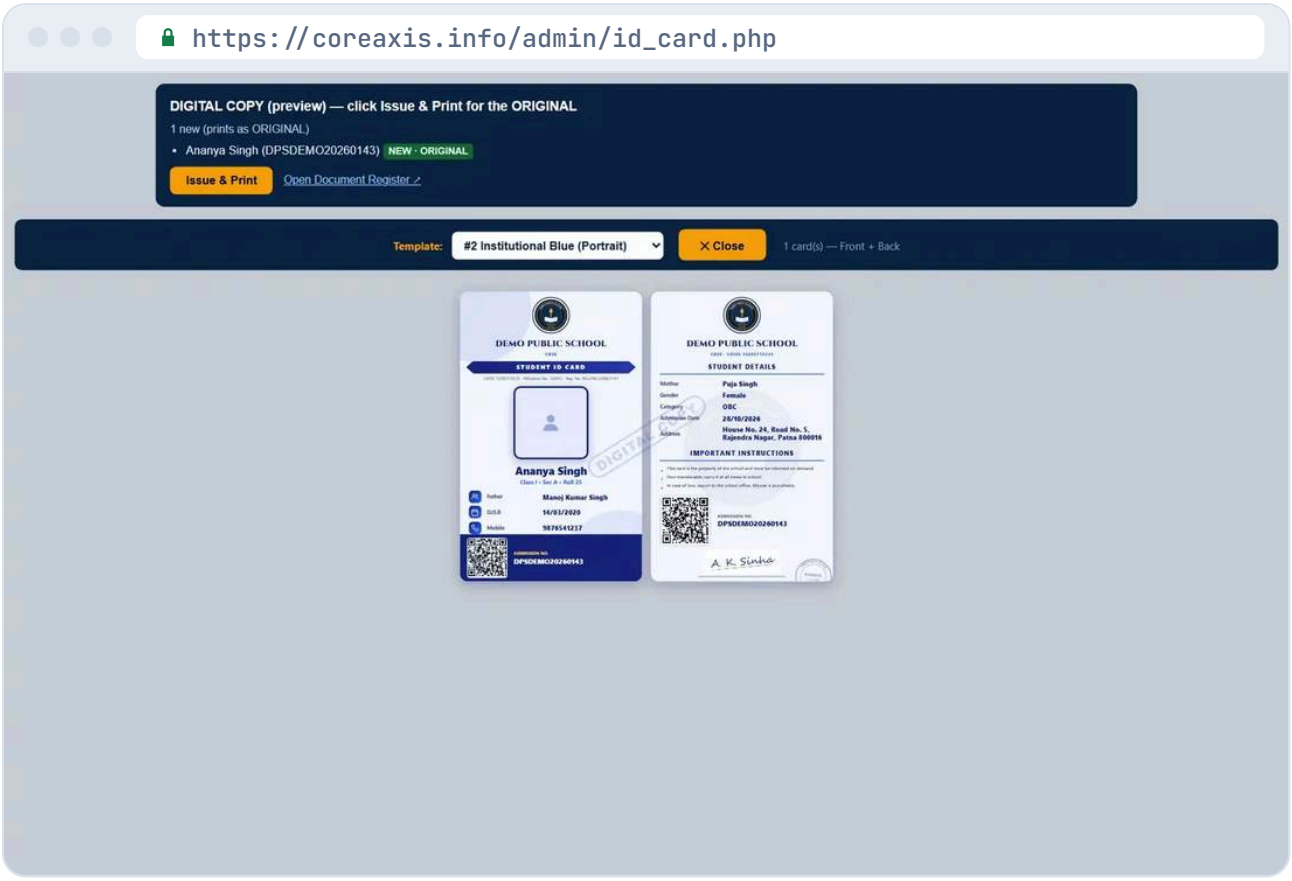
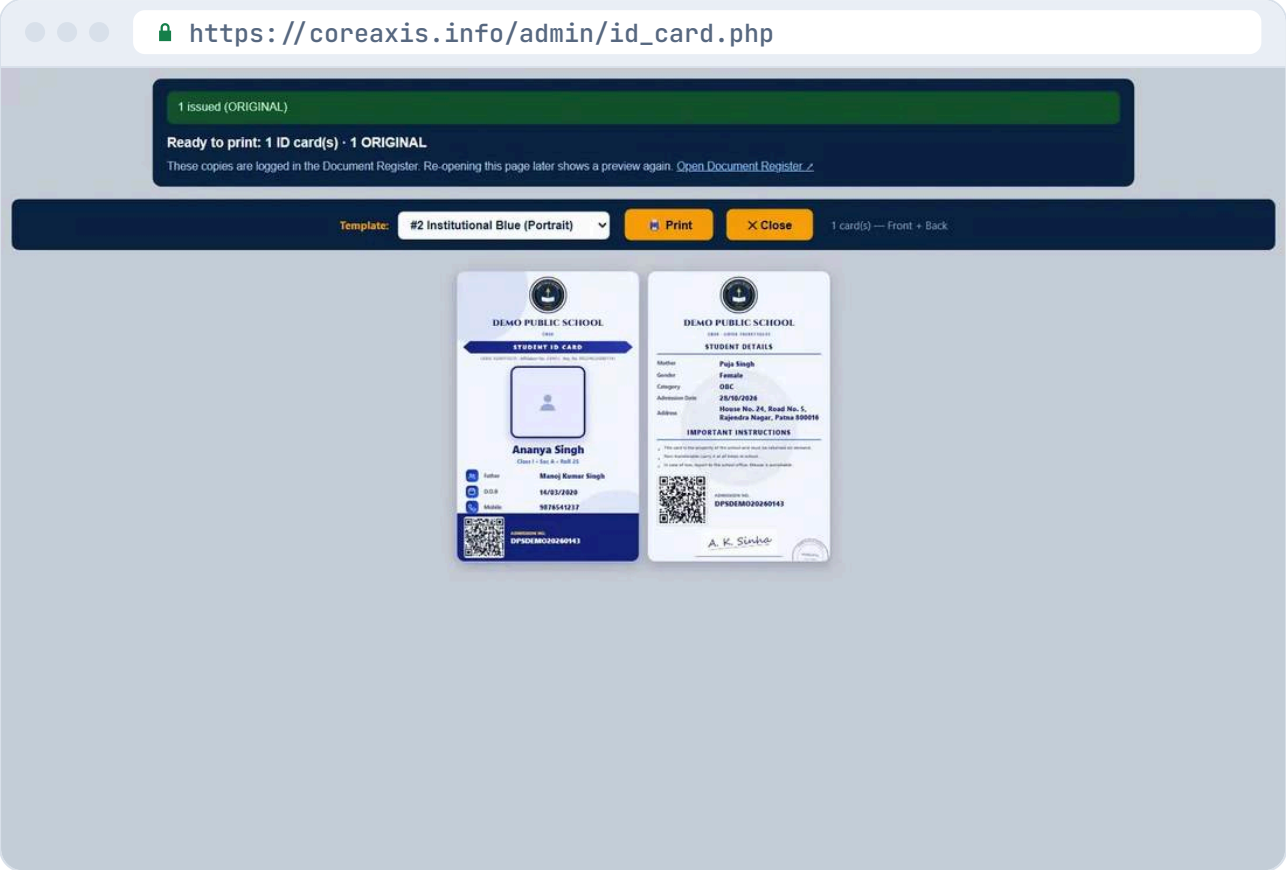
2 Click **Generate & Print**. The preview shows **1 new (prints as ORIGINAL)**.



One card for Ananya Singh.

3 Click **Issue & Print**, then **Print**.



1 issued (ORIGINAL).

TIP A lost card is reprinted the same way. The reprint is a DUPLICATE COPY and needs a reason, for example Card lost. If the school charges a duplicate ID card fee (Document Register › Document Fees), the card prints after the fee is paid.

Screen at a glance

#1 Classic Navy	Portrait, navy and saffron, centred layout.
#2 Institutional Blue	Portrait, formal banner with icon fields.
#3 Emerald Sidebar	Portrait, green side panel.
#4 Maroon Royal	Portrait, maroon and gold, serif type.
#5 Slate Minimal	Portrait, clean monochrome.
#6 Horizontal Navy	Landscape, photo on the left.

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#7 Horizontal Teal	Landscape, modern.
Select Class / Or Single Student	Choose one: a whole class or one student.
Front of the card	School name and board, photo, name, class, section and roll, father, date of birth, mobile, admission number and QR code.
Back of the card	Mother, gender, category, admission date, address, important instructions, QR code, admission number and principal's signature and stamp.

Questions

Can a Teacher print cards?

Yes, for the classes assigned to the teacher. The page is under Cards & Certificates › Student ID Cards.

Where are staff ID cards?

Staff › Staff ID Cards. They work the same way and are always free.

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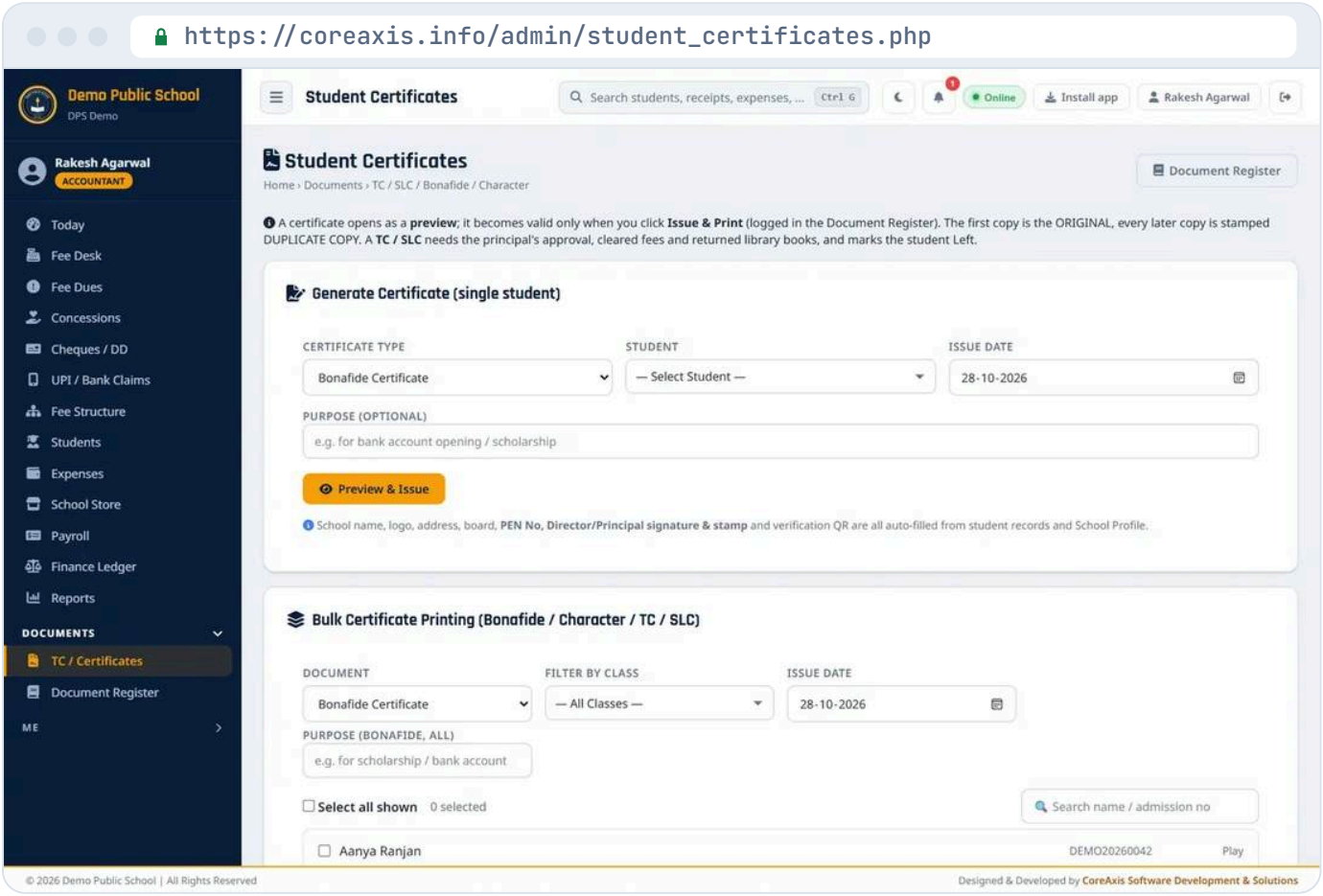
STUDENTS · CHAPTER 9

TC / Bonafide

Admin | Principal | Accountant

MENU Students › TC / Bonafide (Accountant: Documents › TC / Certificates)

This page makes four student certificates: Bonafide, Character, Transfer Certificate (TC) and School Leaving Certificate (SLC). Opening a certificate only shows a preview marked DIGITAL COPY; it becomes a valid document only when you click Issue & Print, which numbers it and logs it in the Document Register. The first copy is the ORIGINAL and every later copy is stamped DUPLICATE COPY. A TC or SLC also needs the principal's approval, cleared fees and returned library books, and issuing the original marks the student Left.



TC / Bonafide — Demo Public School

Rules at a glance

Preview first	Preview & Issue opens the certificate as a DIGITAL COPY preview. Nothing is recorded until you click **Issue & Print** and confirm the popup. An ORIGINAL TC or SLC asks twice, because it also marks the student Left.
ORIGINAL and DUPLICATE COPY	The first issued copy prints as ORIGINAL with a reference number (for example TC/2026/00037), a verify code and a QR code. Every later copy prints as DUPLICATE COPY – 1, – 2 and so on.
TC / SLC: principal approval	When the office (Accountant) issues a TC or SLC, it first goes to the Principal as a request. The Admin or Principal can issue directly because they are the approving authority.
TC / SLC: fees and library	All fee dues must be cleared and all library books returned before the original is issued. The preview shows what is blocking.
TC / SLC: student marked Left	Issuing the original TC or SLC moves the student to Inactive / Alumni with the date and reason for leaving.
Document fees	If the school has set a fee in Document Register › Document Fees, it is added to the student's dues and the copy prints after the fee is paid.
Bonafide / Character	No approval needed. A Bonafide certificate can be issued only for an active student.
Signature	Certificates carry the Principal's signature and stamp from Settings › School Profile, with the Principal's name (Satyajeet Kr. Singh) under it.

Request a TC from the office (example: Priyanshu Raj, Class II-A, father transferred to Ranchi)

Rakesh Agarwal (Accountant) prepares the TC. Because it is a TC, it goes to the Principal for approval.

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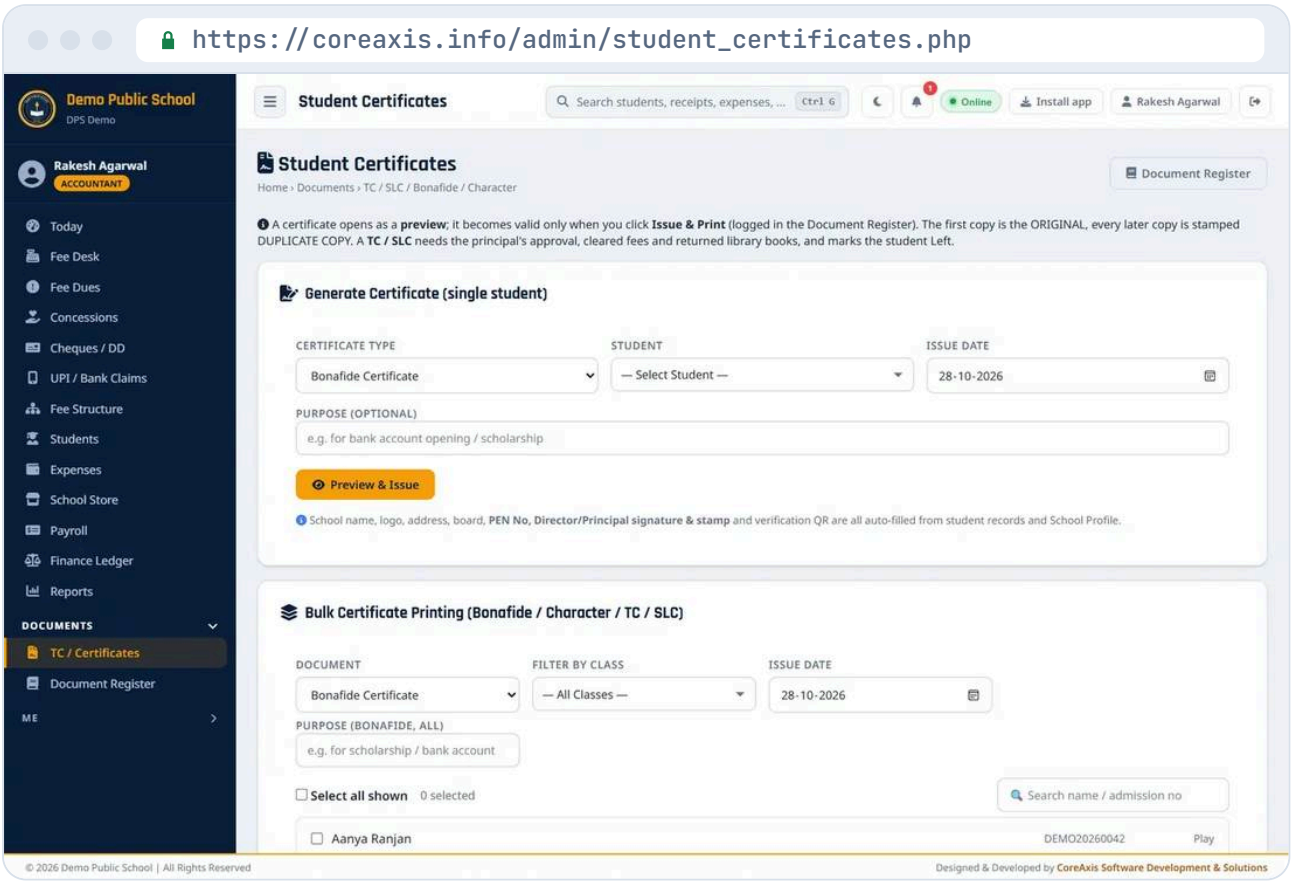
1. Open **Documents › TC / Certificates** (Admin and Principal: **Students › TC / Bonafide**).



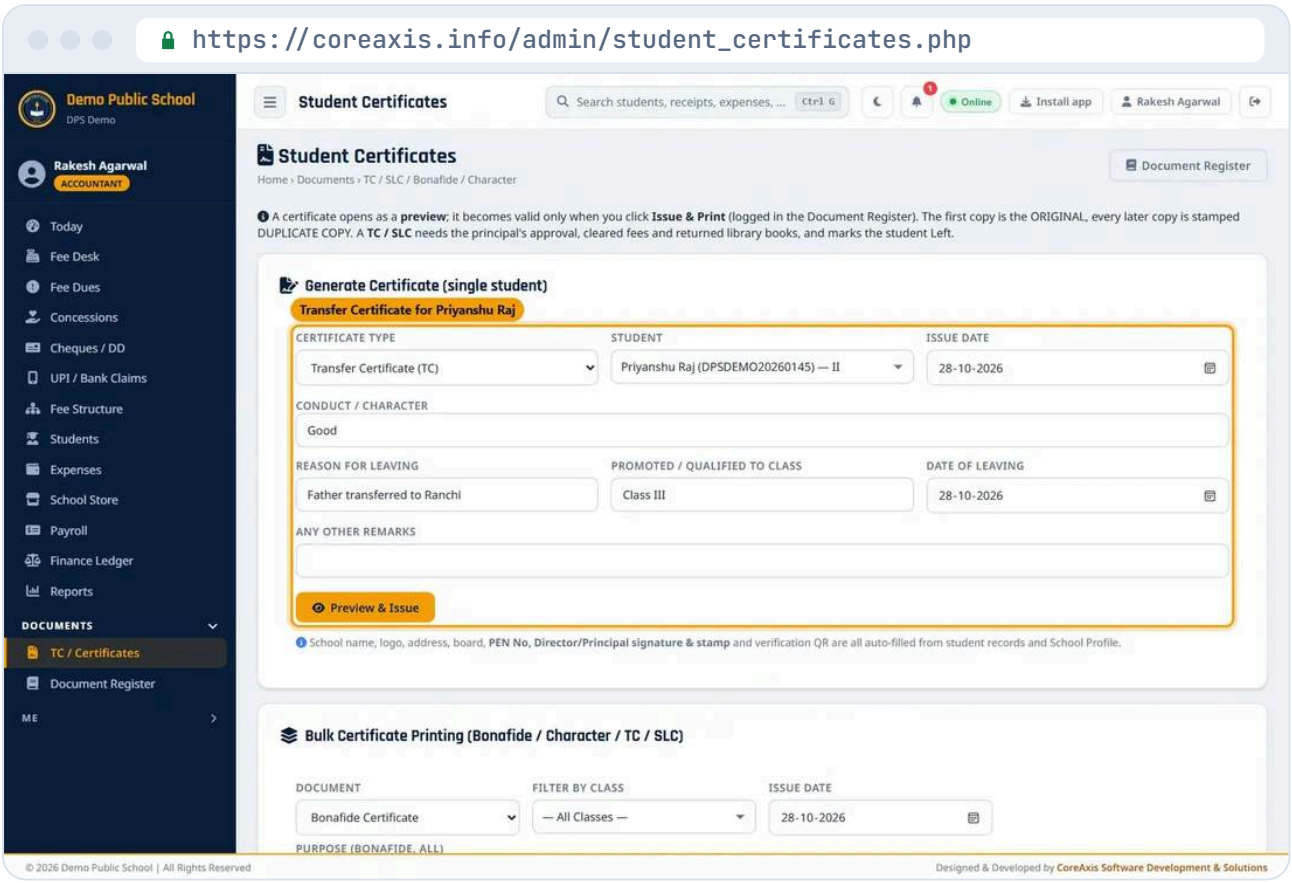
The Student Certificates page.

2. In **Generate Certificate (single student)** pick **Certificate Type**: Transfer Certificate (TC).

3. Pick the **Student**: Priyanshu Raj (DPSDEMO20260145) — II. Type in the box to search.

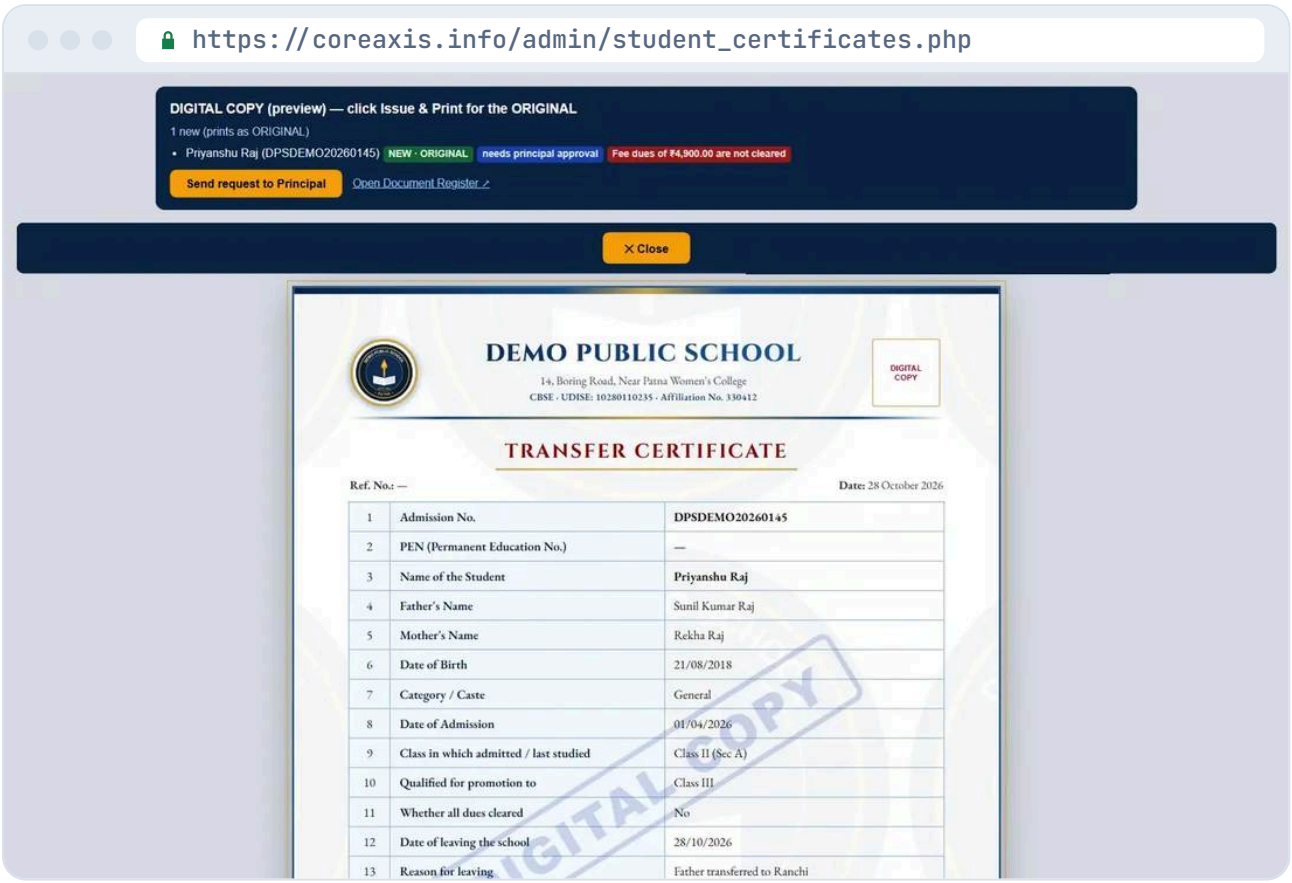
4. Check the **Issue Date** (28-10-2026) and type **Conduct / Character**: Good.

5 Type **Reason for Leaving**: Father transferred to Ranchi, **Promoted / Qualified to Class**: Class III, and pick the **Date of Leaving**: 28-10-2026.



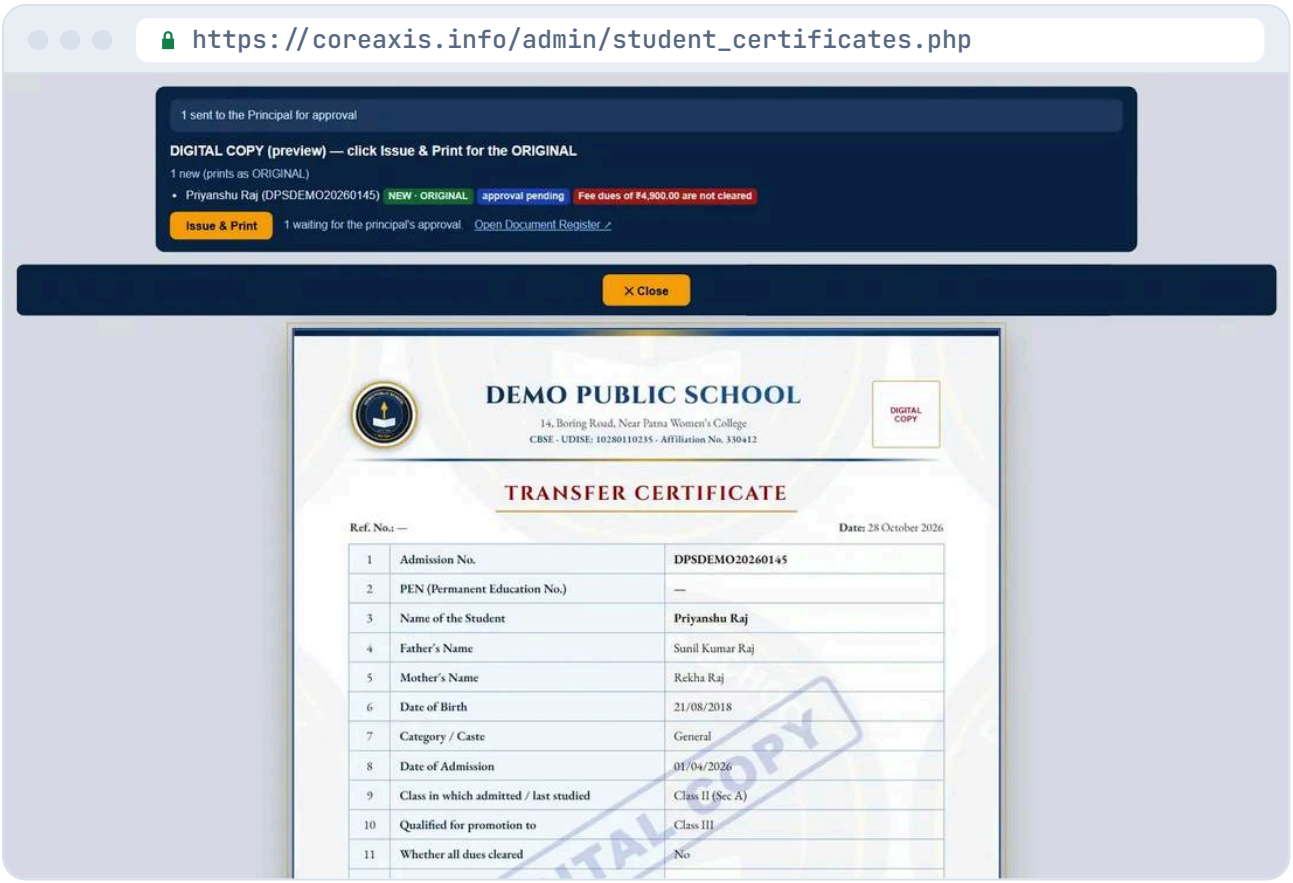
The TC form filled for Priyanshu Raj.

6 Click **Preview & Issue**. The preview opens in a new tab. The top bar lists what is needed: **needs principal approval** and **Fee dues of ₹4,900.00 are not cleared**.



The preview is stamped DIGITAL COPY; the blockers are shown in red and blue.

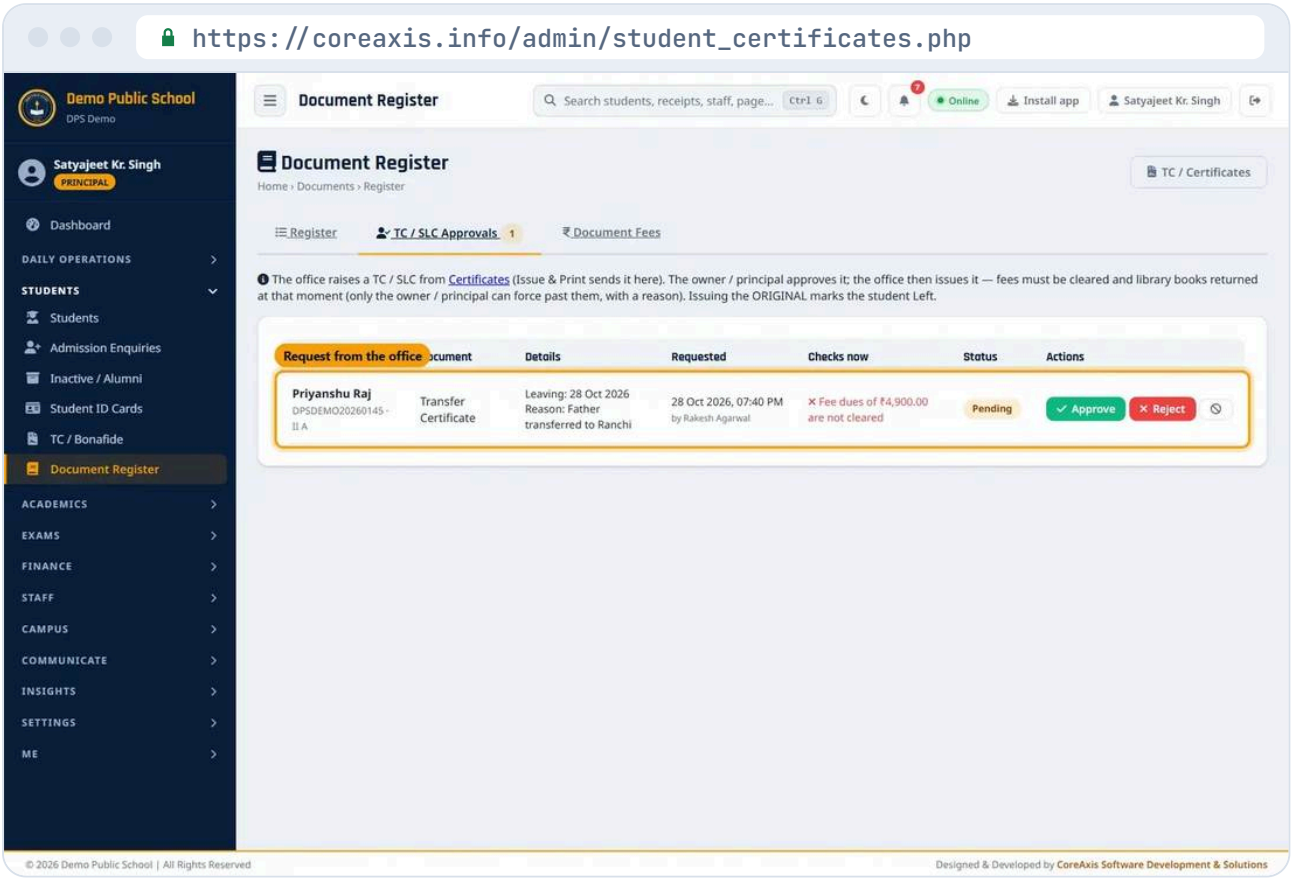
7 Click **Send request to Principal**. The bar shows **1 sent to the Principal for approval**.



The request now waits in the Document Register.

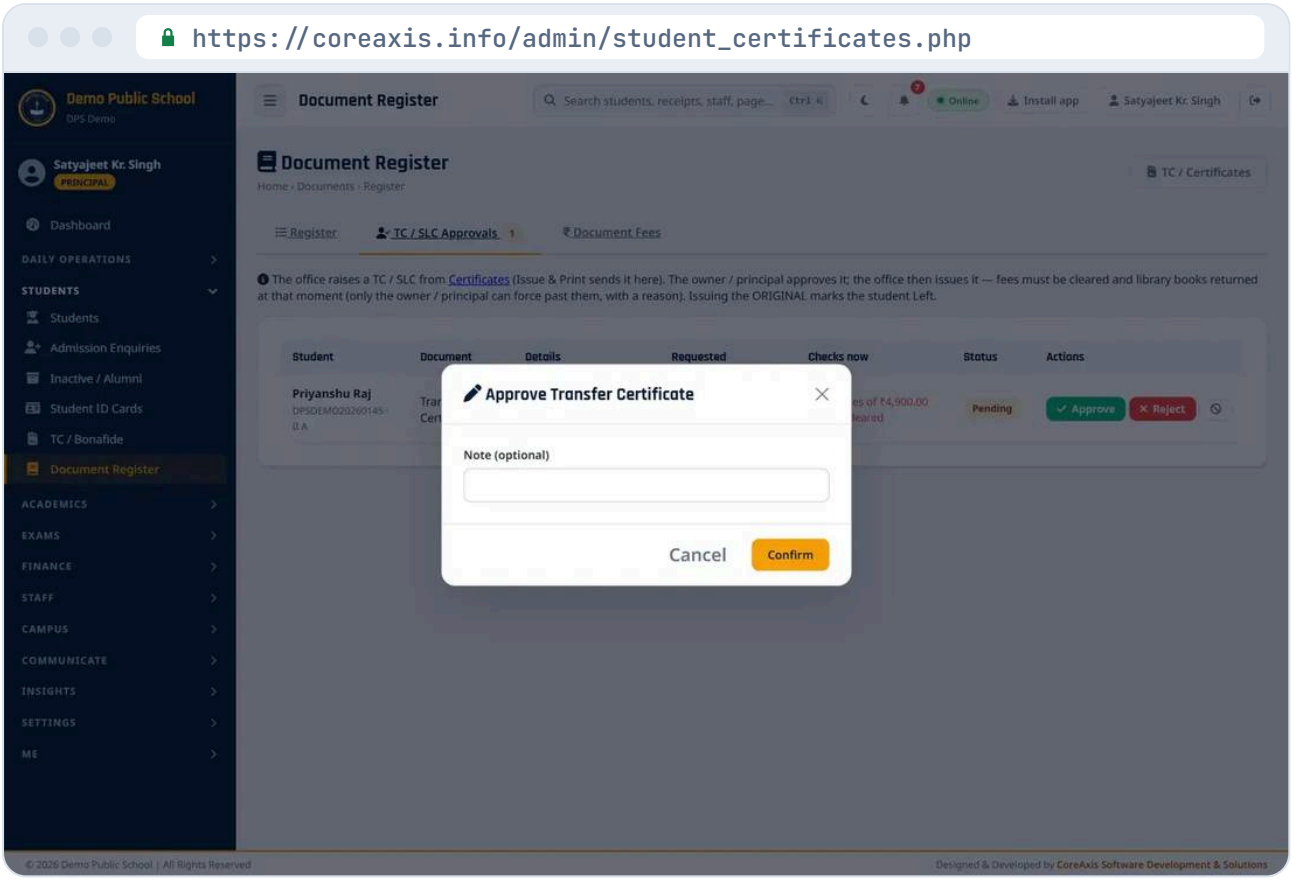
Approve the TC request (Principal Satyajeet Kr. Singh)

1 Open **Students › Document Register** and click the **TC / SLC Approvals** tab. The waiting request shows the student, type, leaving date and reason, who requested it, and the checks still failing.



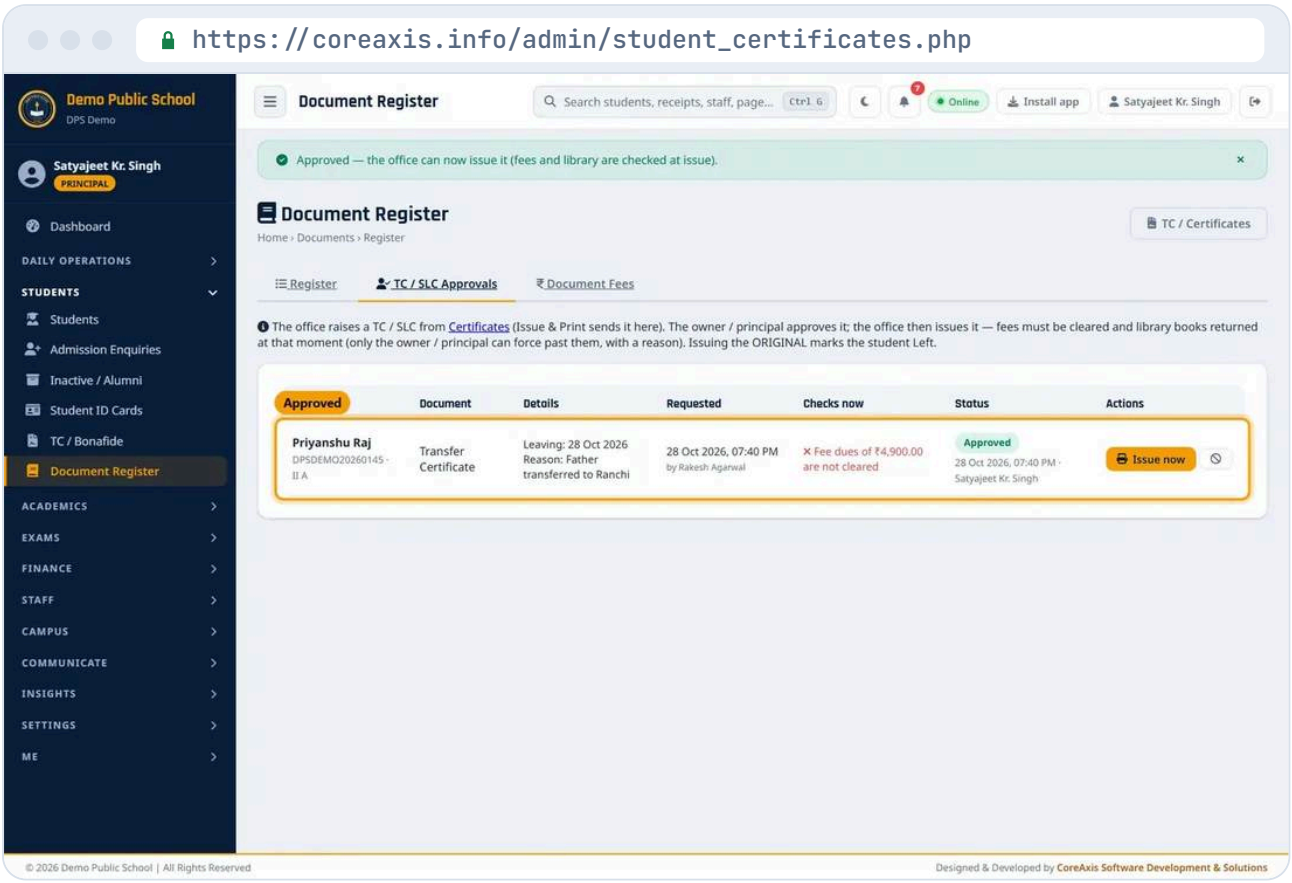
Priyanshu Raj's request, raised by Rakesh Agarwal; fees are still due.

2 Click **Approve**. Type a note if you want (optional) and click **Confirm**.



Approve asks for an optional note; Reject needs a reason.

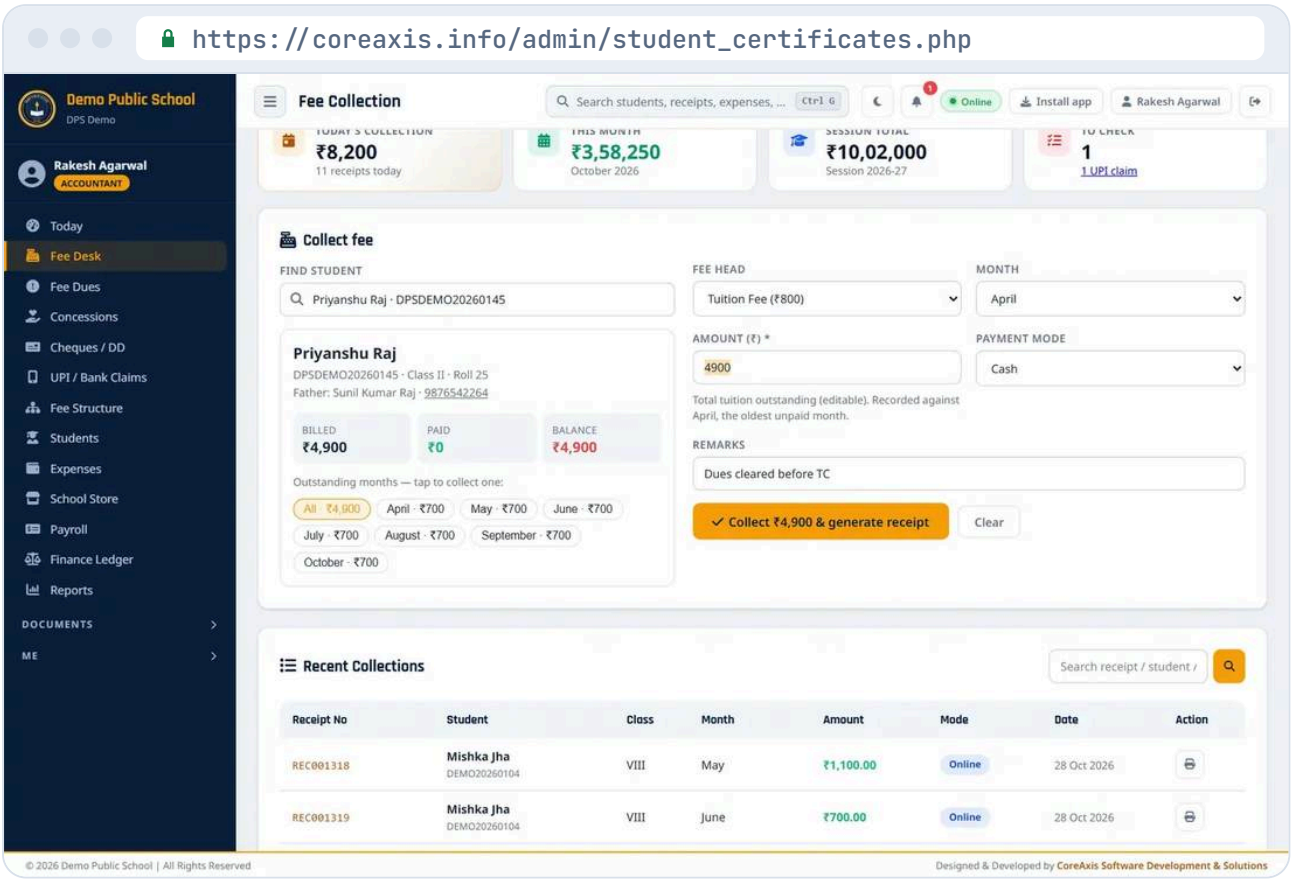
3 The message **Approved — the office can now issue it (fees and library are checked at issue)** appears and the status turns **Approved**.



Approved. The Issue now button opens the TC preview.

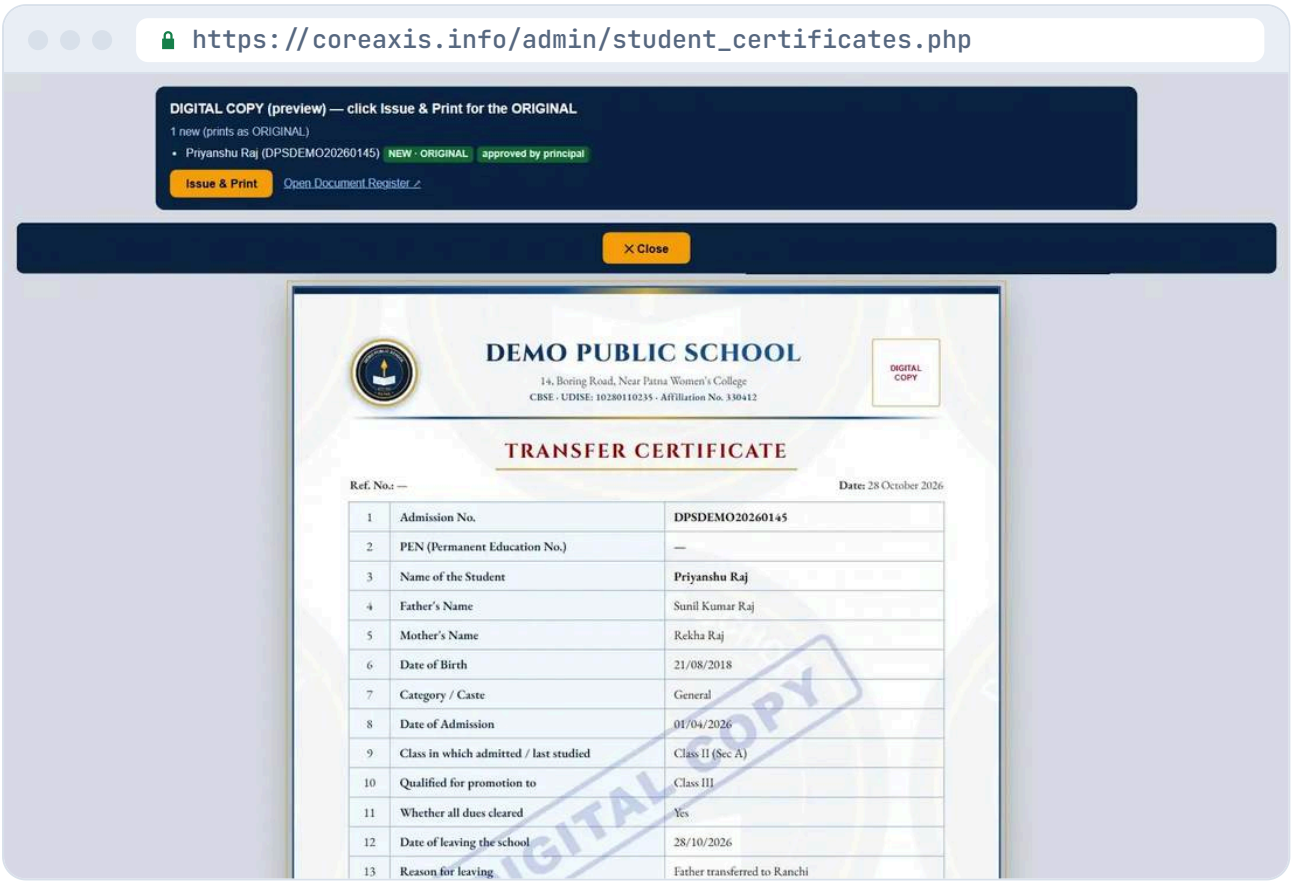
Clear the dues and issue the original TC

1 At the **Fee Desk**, find Priyanshu Raj, tap **All · ₹4,900**, choose the payment mode and collect the fee. (See the Fee Desk chapter.)



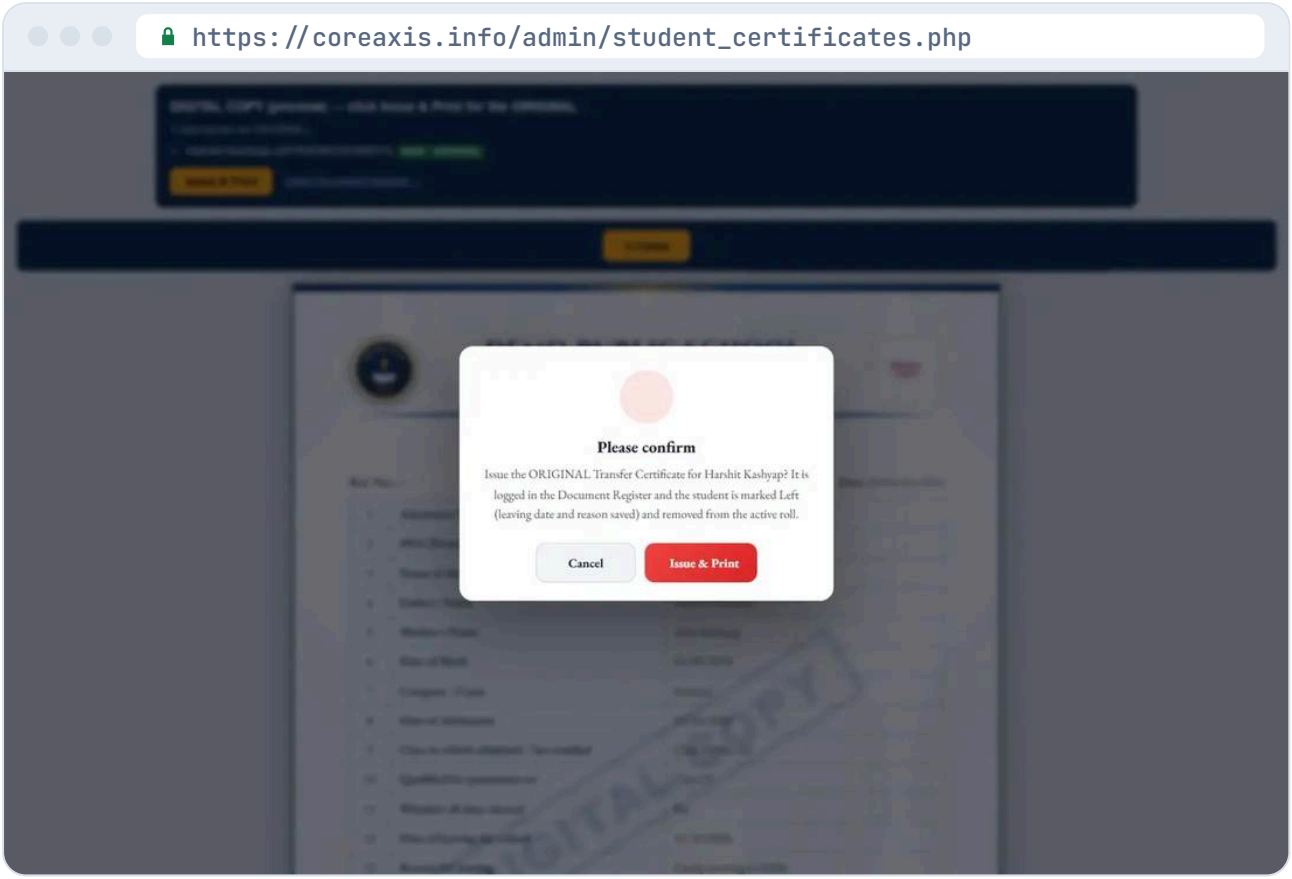
All outstanding months selected at the Fee Desk.

2 Open the TC again (TC / Certificates › Preview & Issue, or **Issue now** in TC / SLC Approvals). The bar now says **approved by principal** and shows no blockers.



Ready to issue.

3 Click **Issue & Print**. The popup reads "Issue the ORIGINAL Transfer Certificate for Priyanshu Raj? It is logged in the Document Register and the student is marked Left (leaving date and reason saved) and removed from the active roll." Click **Issue & Print**, then confirm once more in the second popup.



An ORIGINAL TC asks twice. The first popup names the student (here another student's TC, cancelled) and says they will be marked Left.

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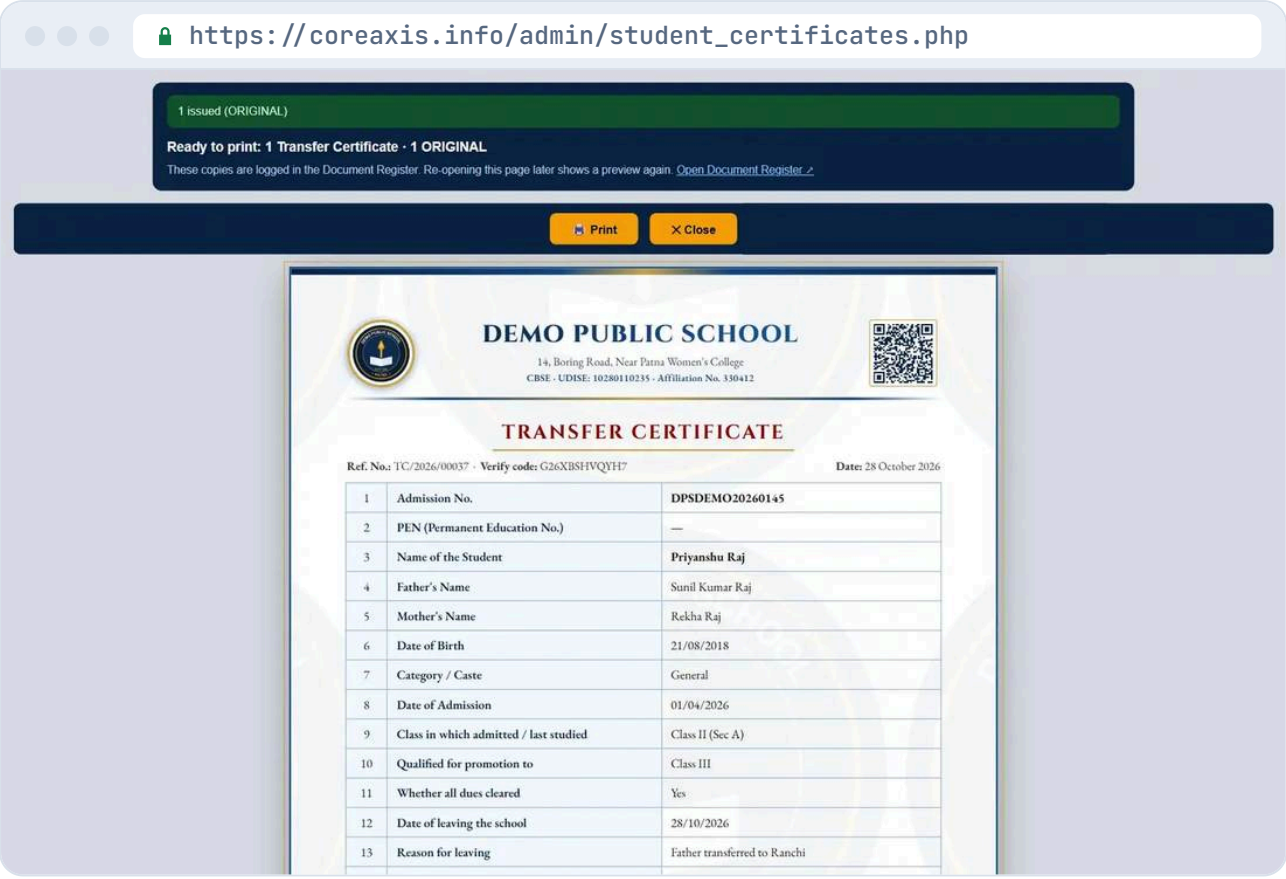
4 The bar shows **1 issued (ORIGINAL)**. The TC now has a reference number (TC/2026/00037), a verify code and a QR code.



The ORIGINAL TC, ready to print.

5 Click **Print** and print on the school's paper. Click **Close** when done.

6 Priyanshu Raj is now marked Left and appears in **Inactive / Alumni** as **Left 28 Oct 2026** with the reason Father transferred to Ranchi.

TIP The Admin or Principal can still issue a blocked TC by forcing the rule with a written reason. The register then shows the document as **Forced (rule overridden)**.

IMPORTANT Issue the original only when the parent is collecting the TC. The student leaves the active roll at once, and a second print will be a DUPLICATE COPY.

Reprint a certificate (DUPLICATE COPY)

1 Open the same certificate again for the same student, or click **Reprint** in the Document Register.

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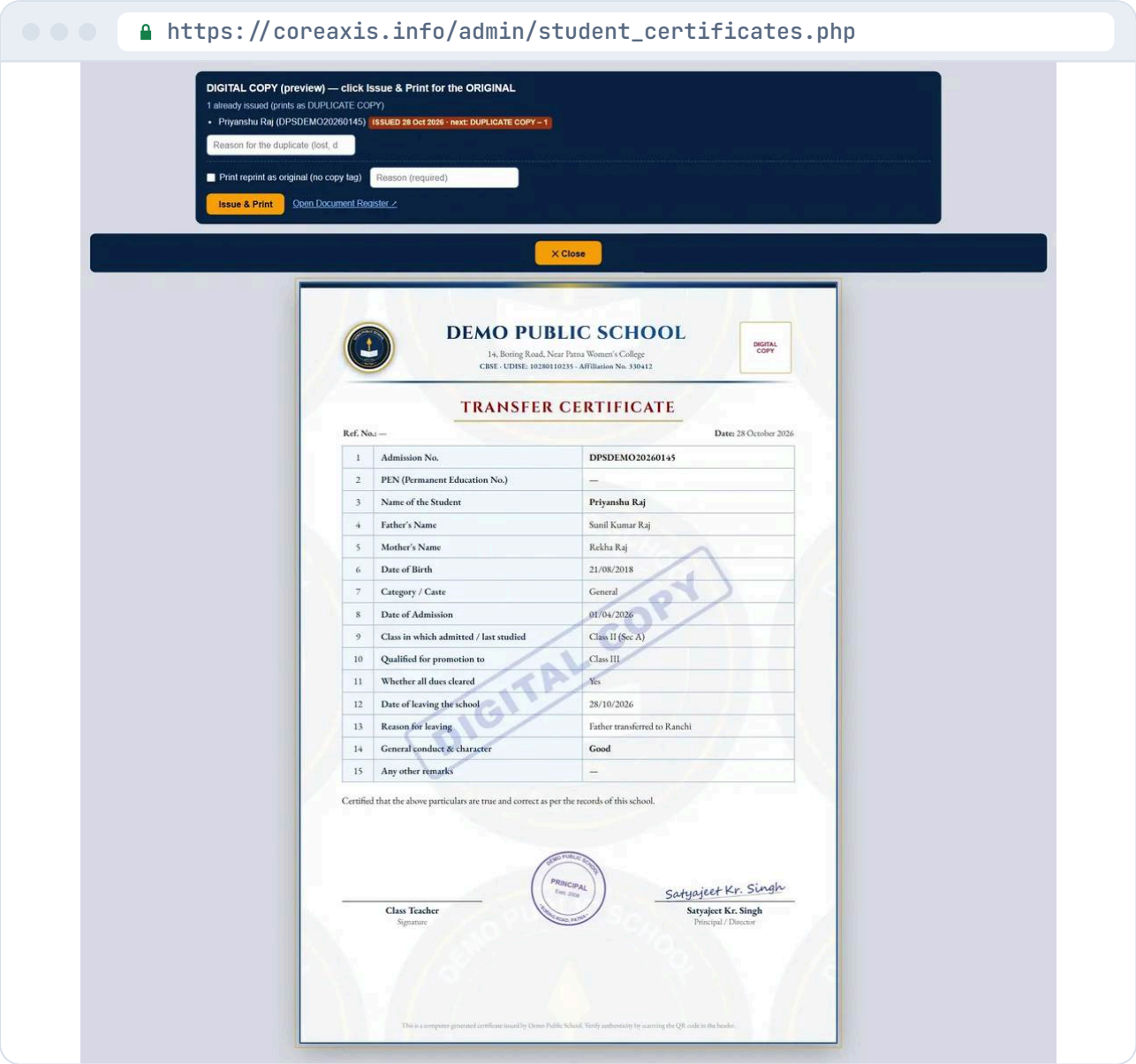
2 The bar says **1 already issued (prints as DUPLICATE COPY)** and shows the next copy number, for example **next: DUPLICATE COPY – 1**.



A TC reprint needs a reason.

3 Click **Issue & Print** and confirm. The copy is stamped **DUPLICATE COPY – 1** with the reprint date.

4 Click **Issue & Print**. The copy is stamped **DUPLICATE COPY – 1** with the reprint date.

Issue a Bonafide certificate (example: Kabir Sharma, Class V-A, for a scholarship)

1 Pick **Certificate Type**: Bonafide Certificate and the **Student**: Kabir Sharma (DEMO20260021) — V.

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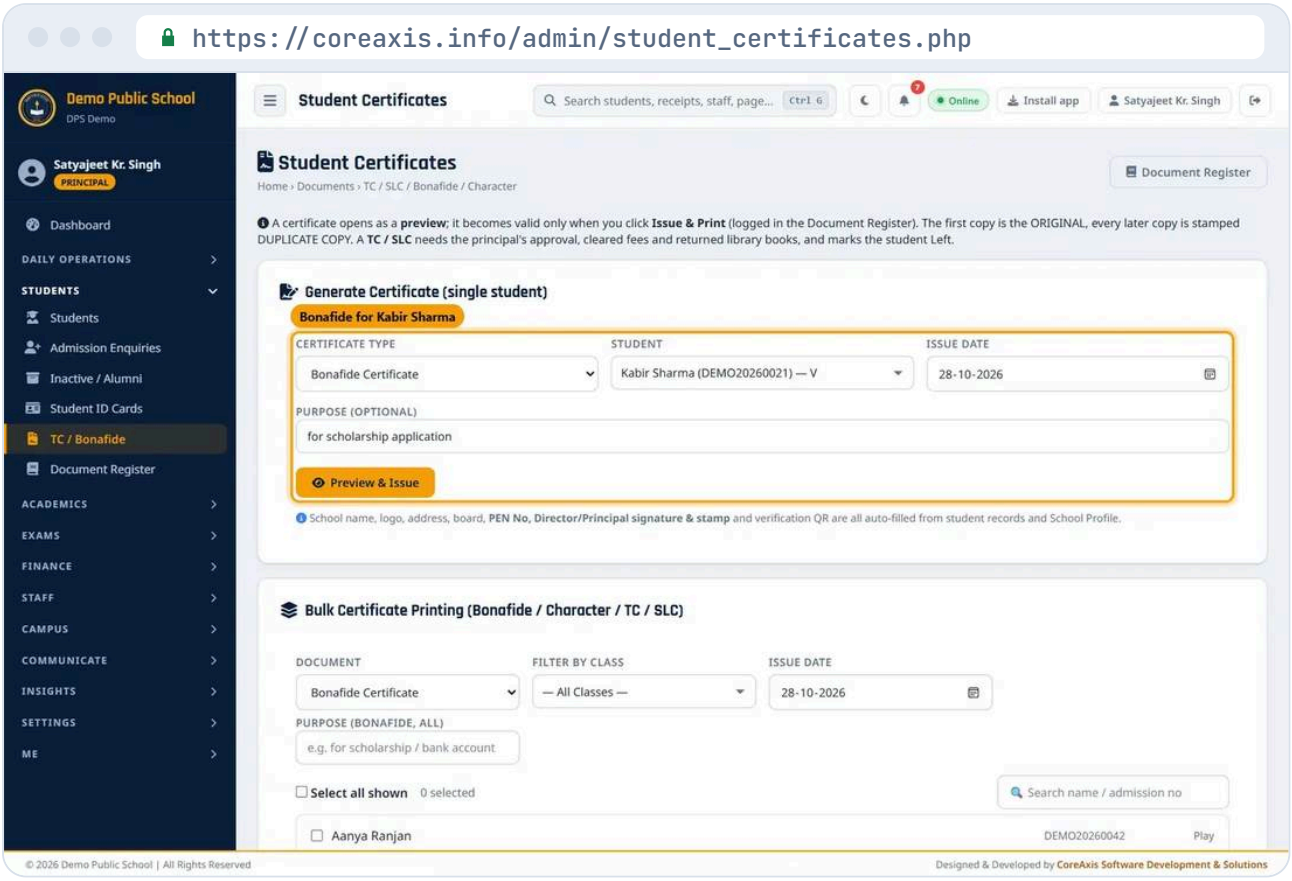
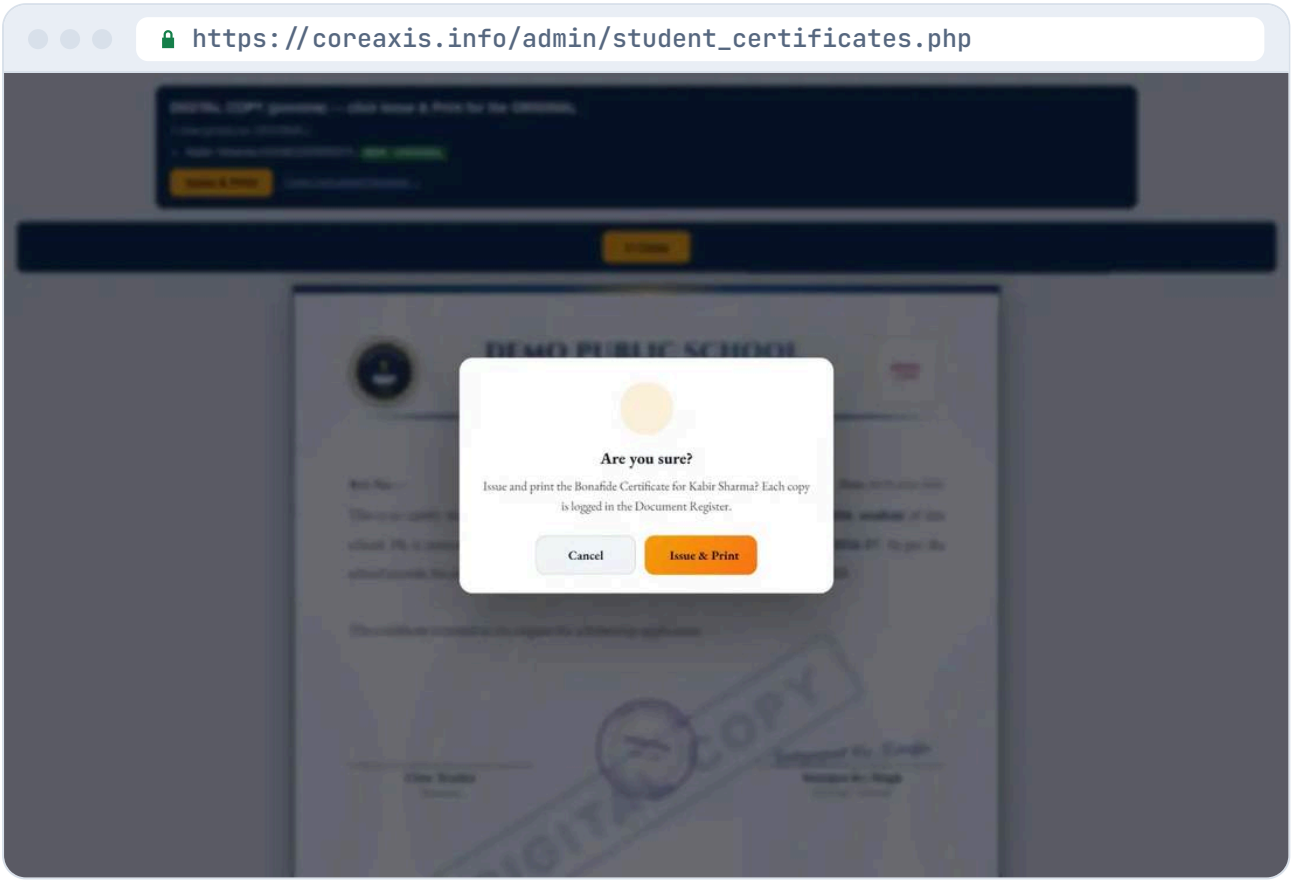
2 Type the **Purpose (optional)**: for scholarship application.



Bonafide needs only the student and purpose.

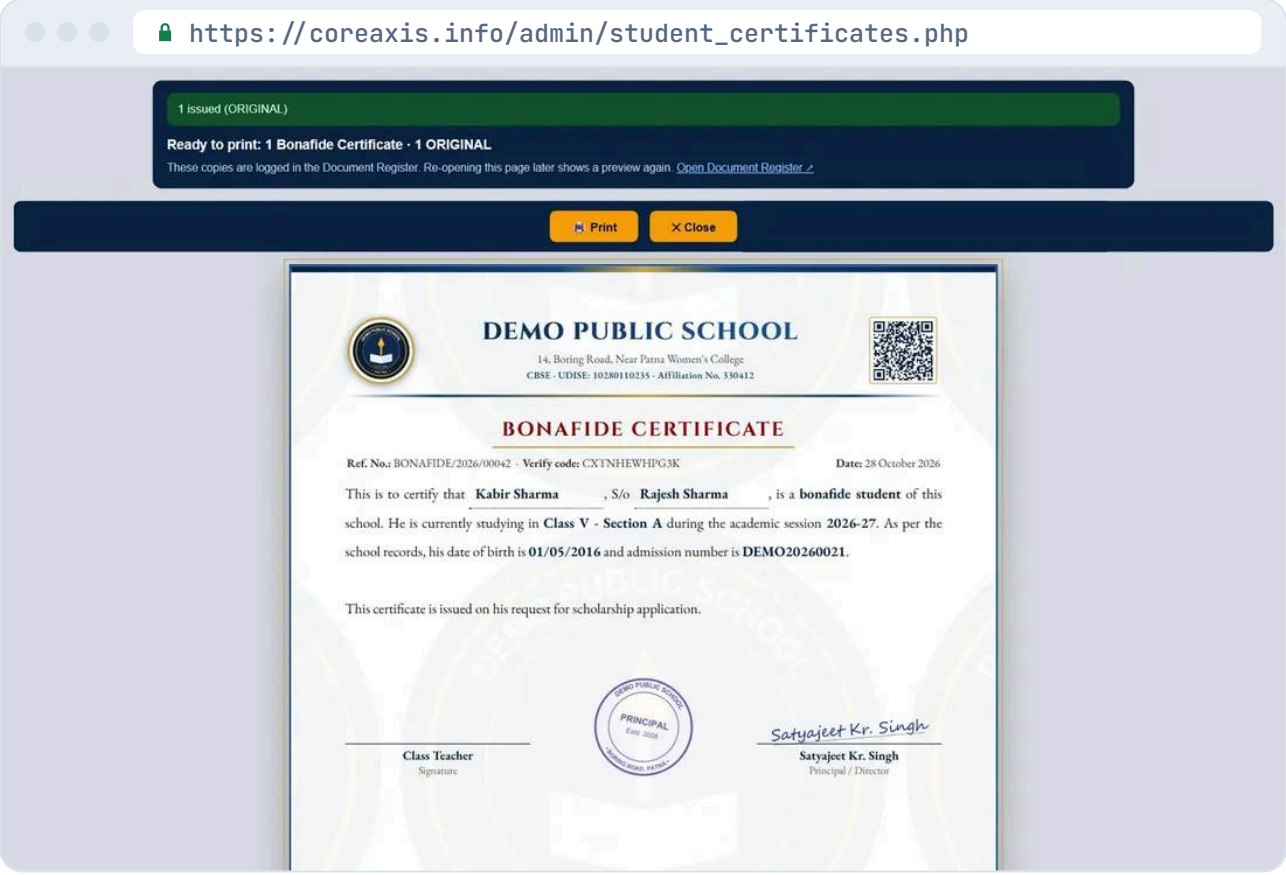
3 Click **Preview & Issue** and check the preview.

4 Click **Issue & Print**. The popup asks "Issue and print the Bonafide Certificate for Kabir Sharma? Each copy is logged in the Document Register." Click **Issue & Print**.



Issue & Print asks once for a Bonafide certificate.

5 The certificate gets the number BONAFIDE/2026/00042 and prints as ORIGINAL.



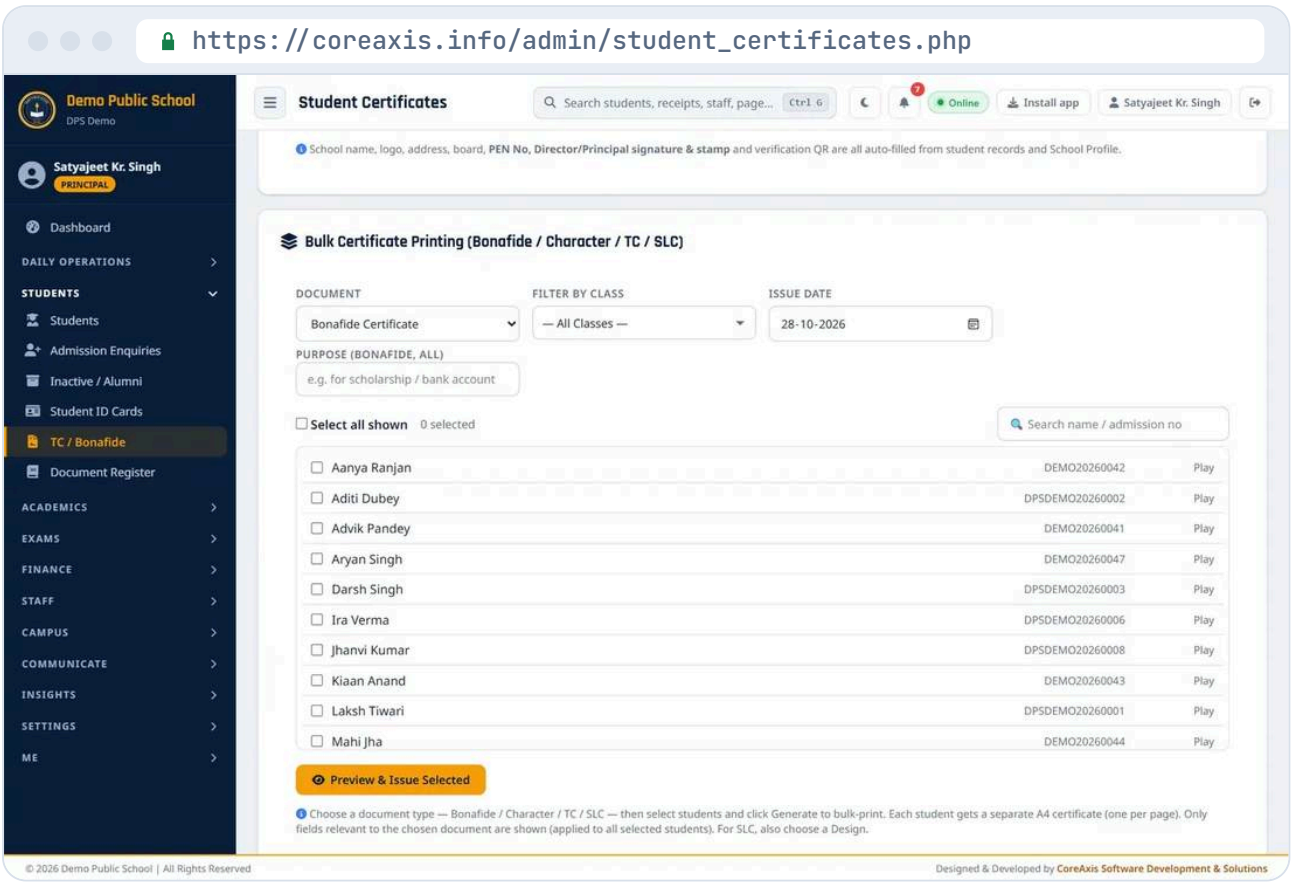
The issued Bonafide certificate with QR code, the Principal's stamp and signature (Satyajeet Kr. Singh).

6 Click **Print**.

TIP A Character certificate works the same way; fill **Conduct / Character** instead of Purpose.

Print certificates for many students at once

1. Scroll to **Bulk Certificate Printing (Bonafide / Character / TC / SLC)**.



The bulk section.

2. Pick the **Document**, then **Filter by Class** to list that class's students.
3. Set the **Issue Date** and the common details (purpose, conduct, or leaving date, reason and promoted class for TC / SLC). For SLC choose an **SLC Design**.
4. Click **Preview & Issue Selected**, check the preview and click **Issue & Print**, then confirm. Each certificate prints on its own page.
5. Click **Preview & Issue Selected**, check the preview and click **Issue & Print**. Each certificate prints on its own page.

Form fields

Certificate Type	Bonafide Certificate, Character Certificate, Transfer Certificate (TC), School Leaving Certificate (SLC).
Student	Active students first; students who have left are marked [left / inactive].

Issue Date	Date printed on the certificate.
SLC Design Template	Choice of four SLC layouts (SLC only).
Purpose (optional)	Bonafide only, for example for scholarship or bank account.
Conduct / Character	Printed on Character, TC and SLC, for example Good.
Reason for Leaving / Promoted / Qualified to Class / Date of Leaving	TC and SLC only.
Any Other Remarks	Optional line printed at the end.

Questions

The preview says 'Library books not returned'.

Return the books at Campus › Library, then open the TC again. The check runs every time the preview opens.

How does someone check that a TC is real?

Scanning the QR code, or entering the verify code on the school's verification page, shows the document details or says it was revoked.

Can a Teacher issue certificates?

No. Teachers do not see this page. Exam certificates for competitions and results are under Exams › Exam Certificates.

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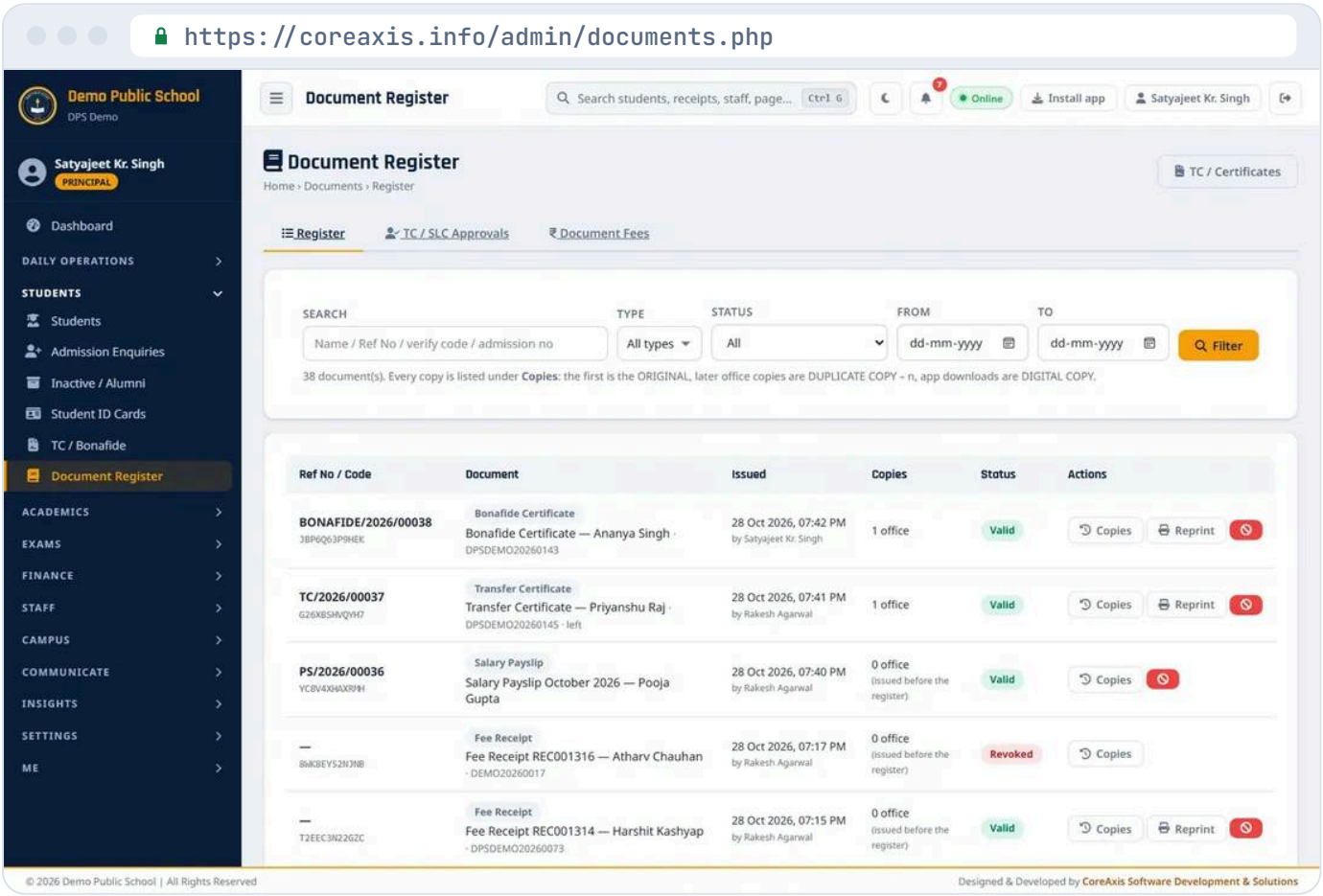
STUDENTS · CHAPTER 10

Document Register

Admin Principal Accountant

MENU Students › Document Register (Accountant: Documents › Document Register)

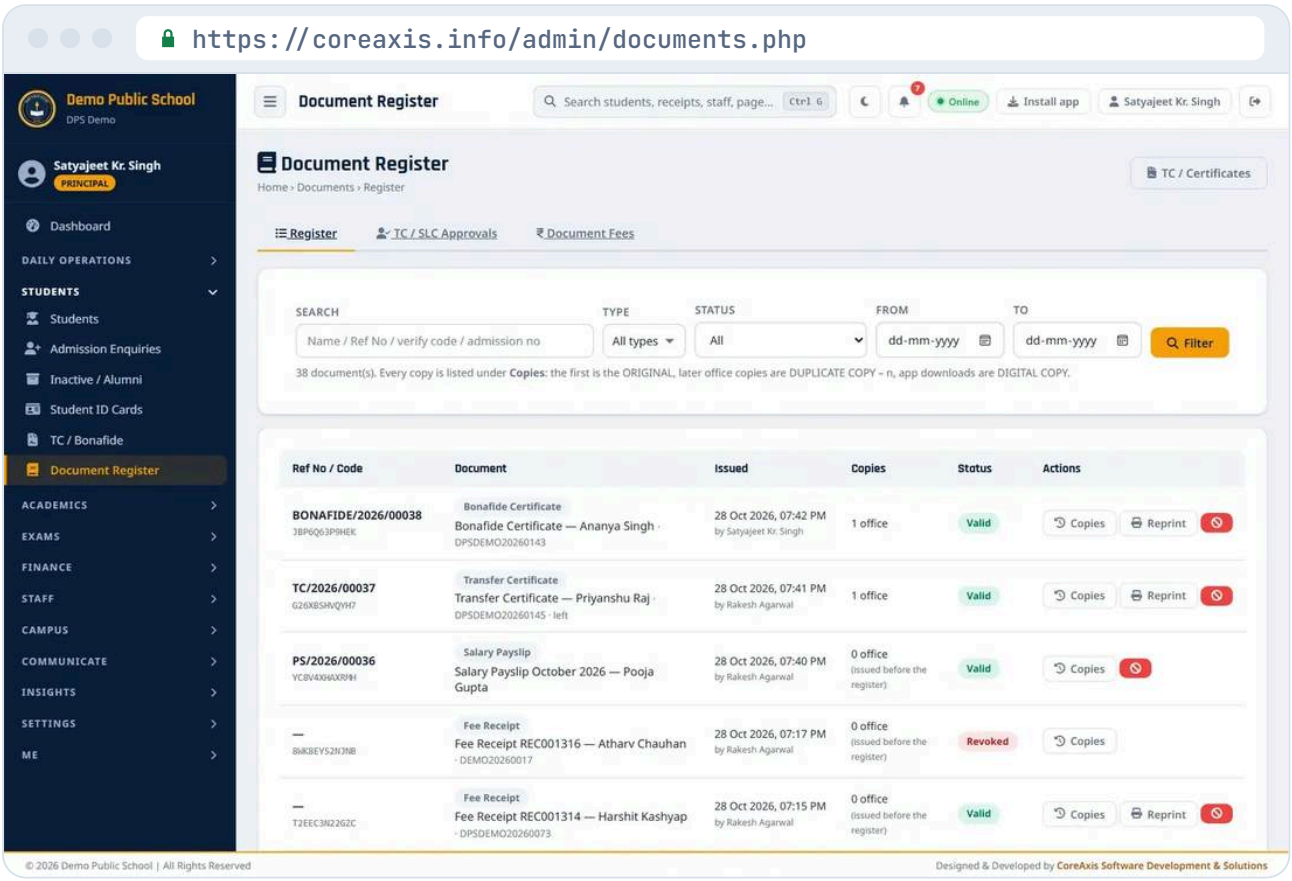
Every document issued with Issue & Print is entered in the Document Register with a reference number and a verify code. Each copy is listed: the first is the ORIGINAL, later office copies are DUPLICATE COPY – n, and downloads from the parent portal or mobile app are DIGITAL COPY. The register has three tabs: Register (all documents), TC / SLC Approvals (requests from the office) and Document Fees (what the school charges per document). Admins and Principals can revoke a document, waive a fee and approve TC requests; the Accountant can view, reprint and raise requests.



Document Register — Demo Public School

Find an issued document (example: Ananya Singh's Bonafide certificate)

1. In the sidebar open **Students** and click **Document Register**. The **Register** tab lists the latest documents first.

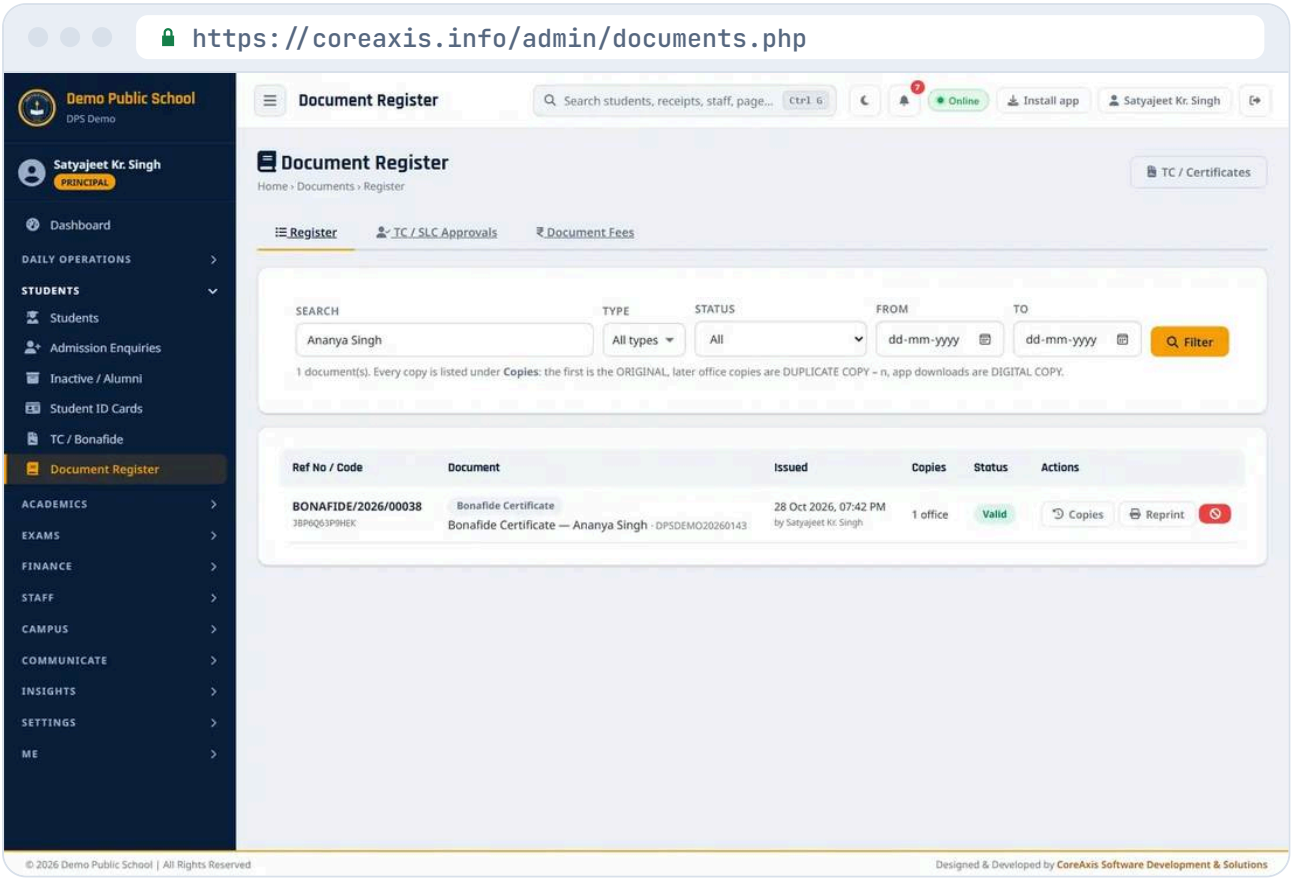


The Register tab.

2. Type a name, reference number, verify code or admission number in **Search**, for example Ananya Singh.

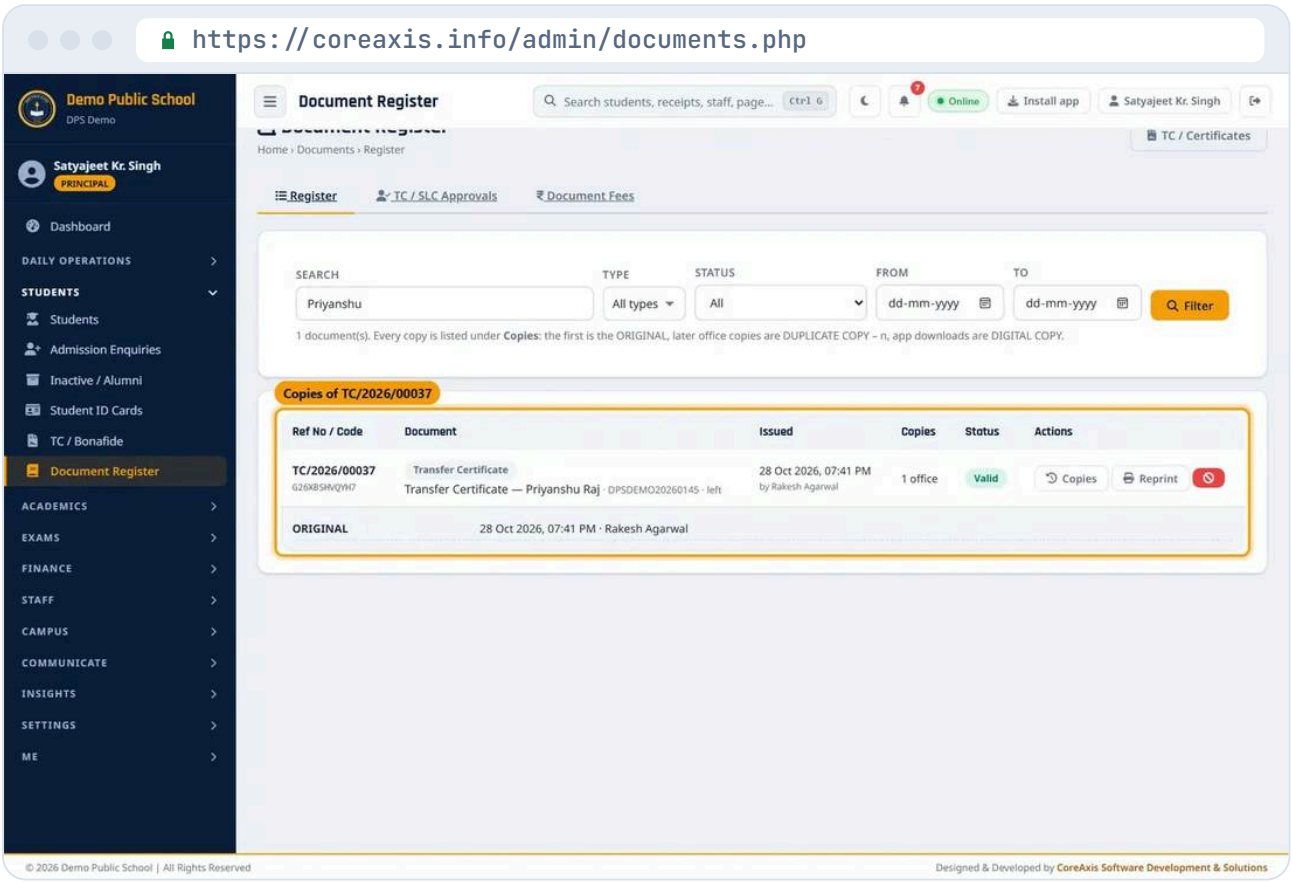
3. Narrow the list with **Type** (for example Bonafide Certificate), **Status** and the **From** / **To** dates if needed.

4 Click **Filter**.



BONAFIDE/2026/00038 issued by Satyajeet Kr. Singh.

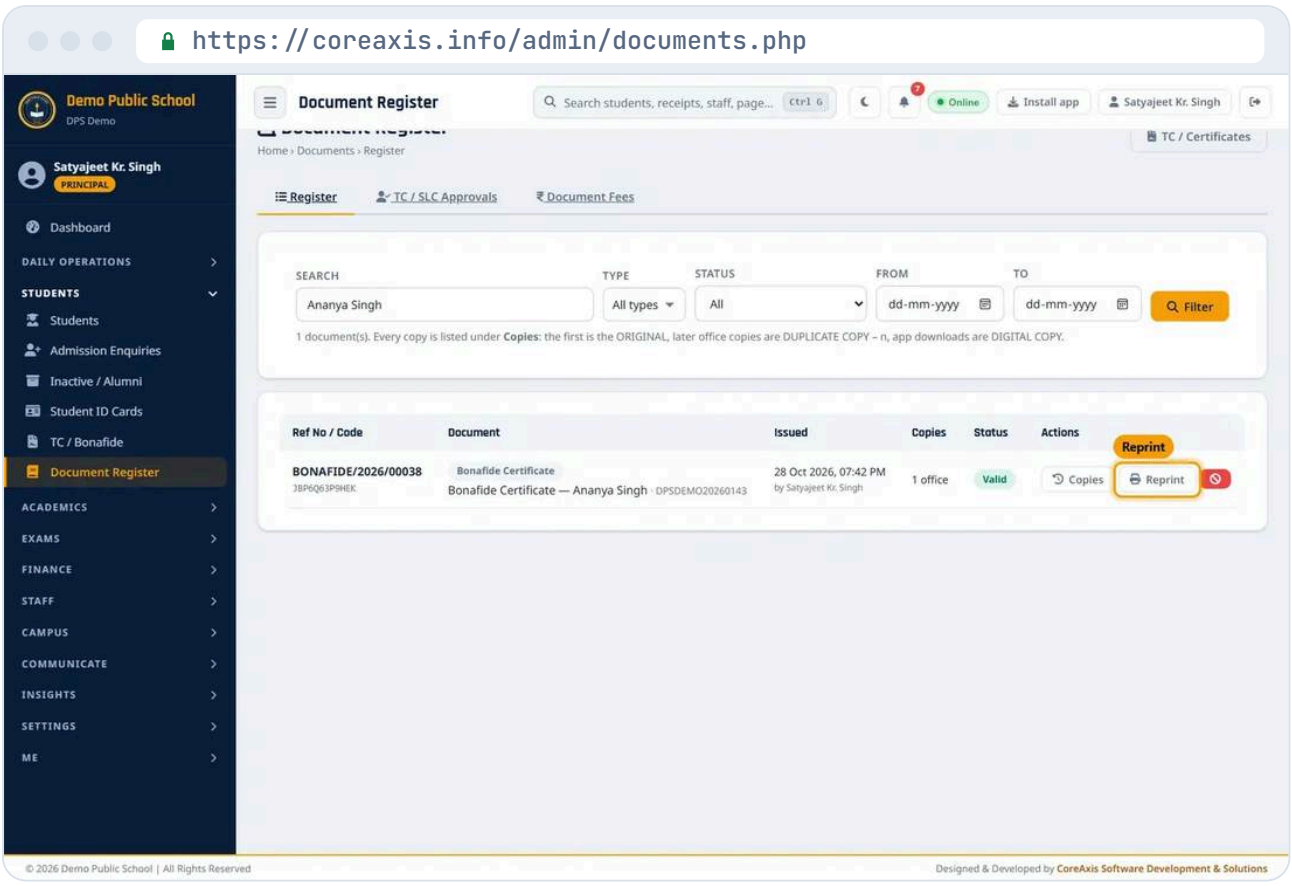
5 Click **Copies** on the row to see every copy with date and the person who printed it.



The TC of Priyanshu Raj: one ORIGINAL, printed by Rakesh Agarwal.

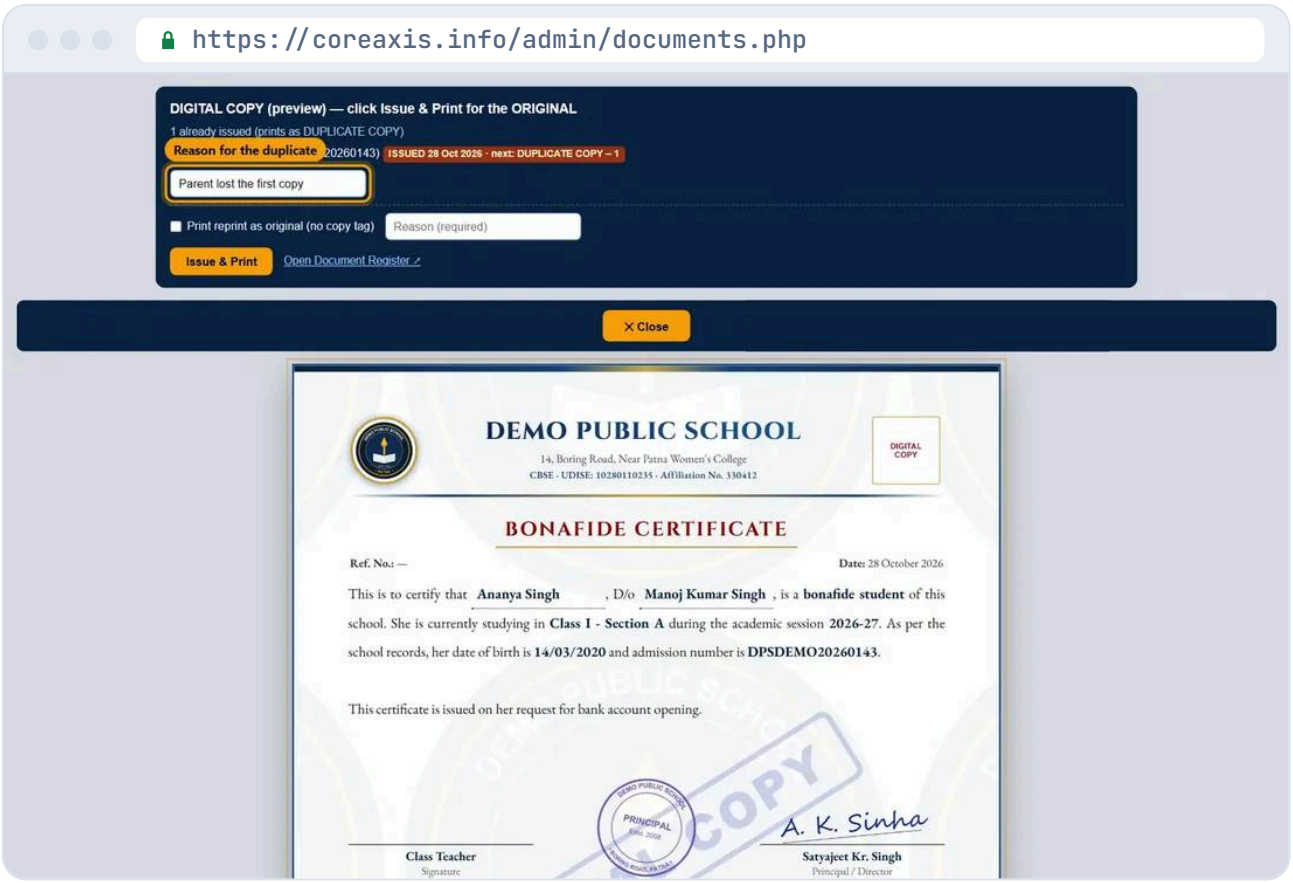
Print a duplicate copy (example: Ananya's parent lost the Bonafide)

1 Find the document and click **Reprint**. A preview opens in a new tab.



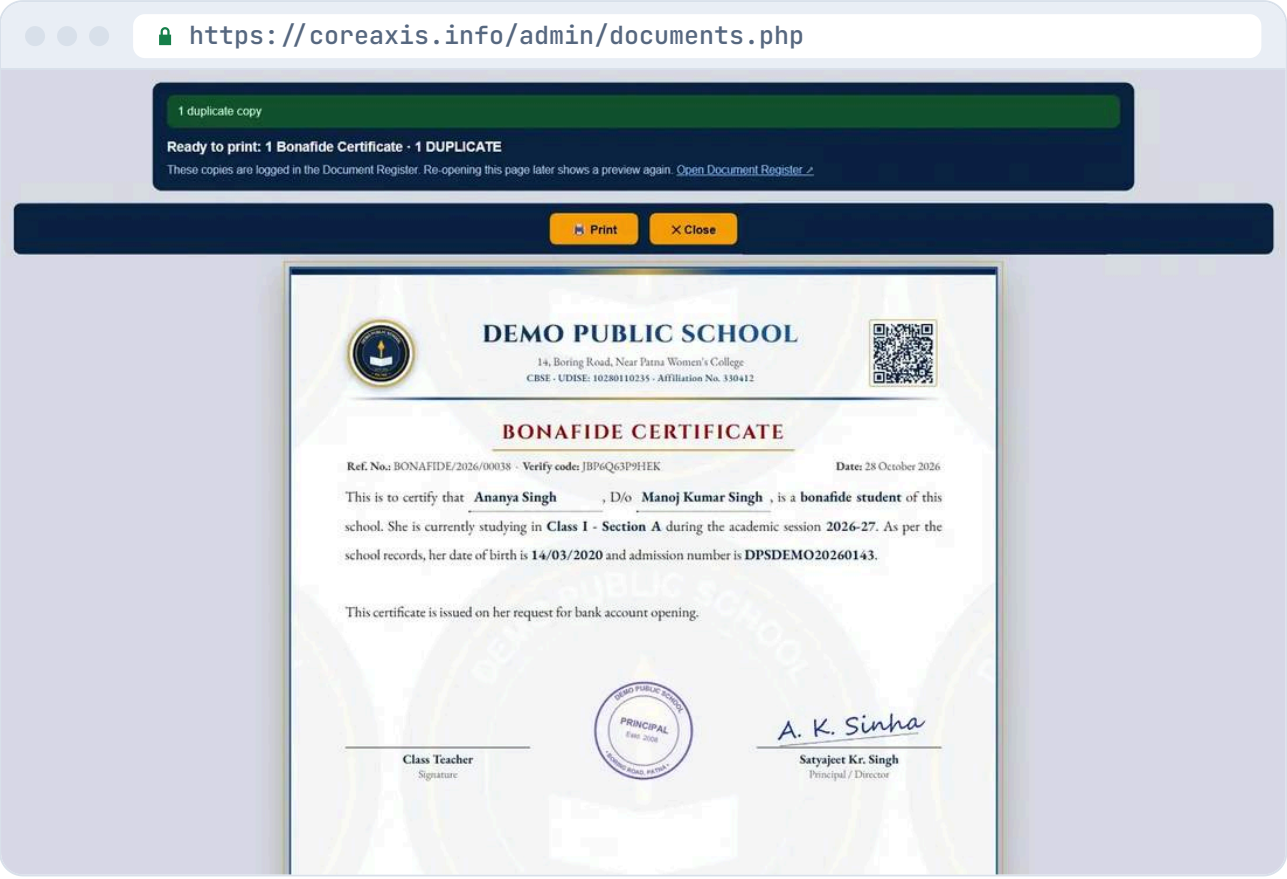
Reprint makes the next DUPLICATE COPY.

2 Type the **Reason for the duplicate**, for example Parent lost the first copy. It is required for TC, SLC and ID cards and optional for others.



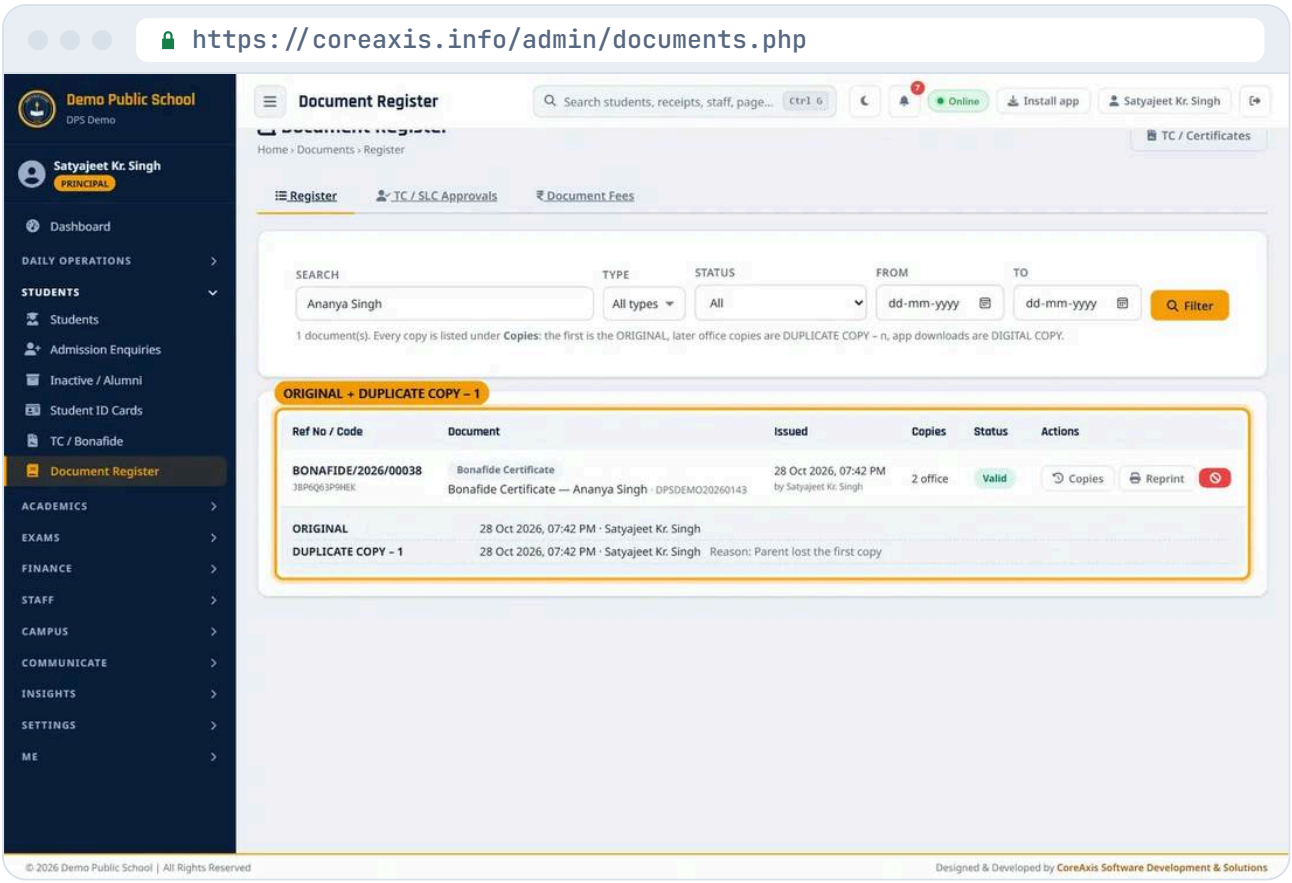
The reason is saved with the copy.

3 Click **Issue & Print**. The bar shows **1 duplicate copy** and the certificate is stamped **DUPLICATE COPY – 1** with the reprint date.



Same reference number and verify code as the original.

4 Click **Print**. Back in the register, **Copies** now shows ORIGINAL and DUPLICATE COPY – 1.



2 office copies.

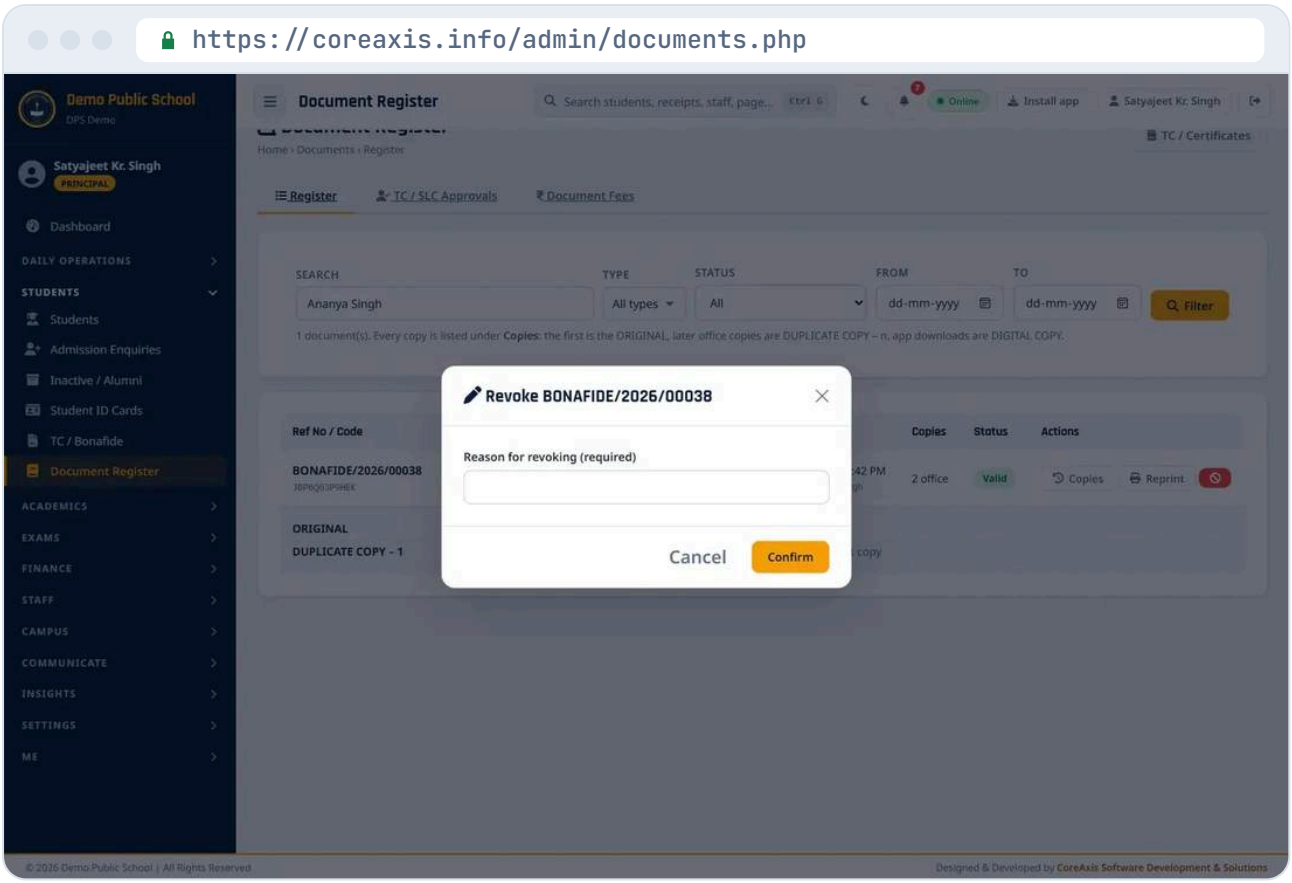
TIP If the school charges a duplicate fee, the copy waits as **Fee pending** until the fee is collected at the Fee Desk. Then click **Print (fee paid)** under Copies. Admin or Principal can **Waive** the fee with a reason.

Revoke a document issued by mistake

Only the Admin or Principal can revoke. A revoked document shows as revoked when its QR code or verify code is checked, and the same document can be issued afresh.

1 Find the document and click the red **Revoke** button (circle with a line) on the row.

2 Type the **Reason for revoking (required)**, for example Wrong date of birth printed.



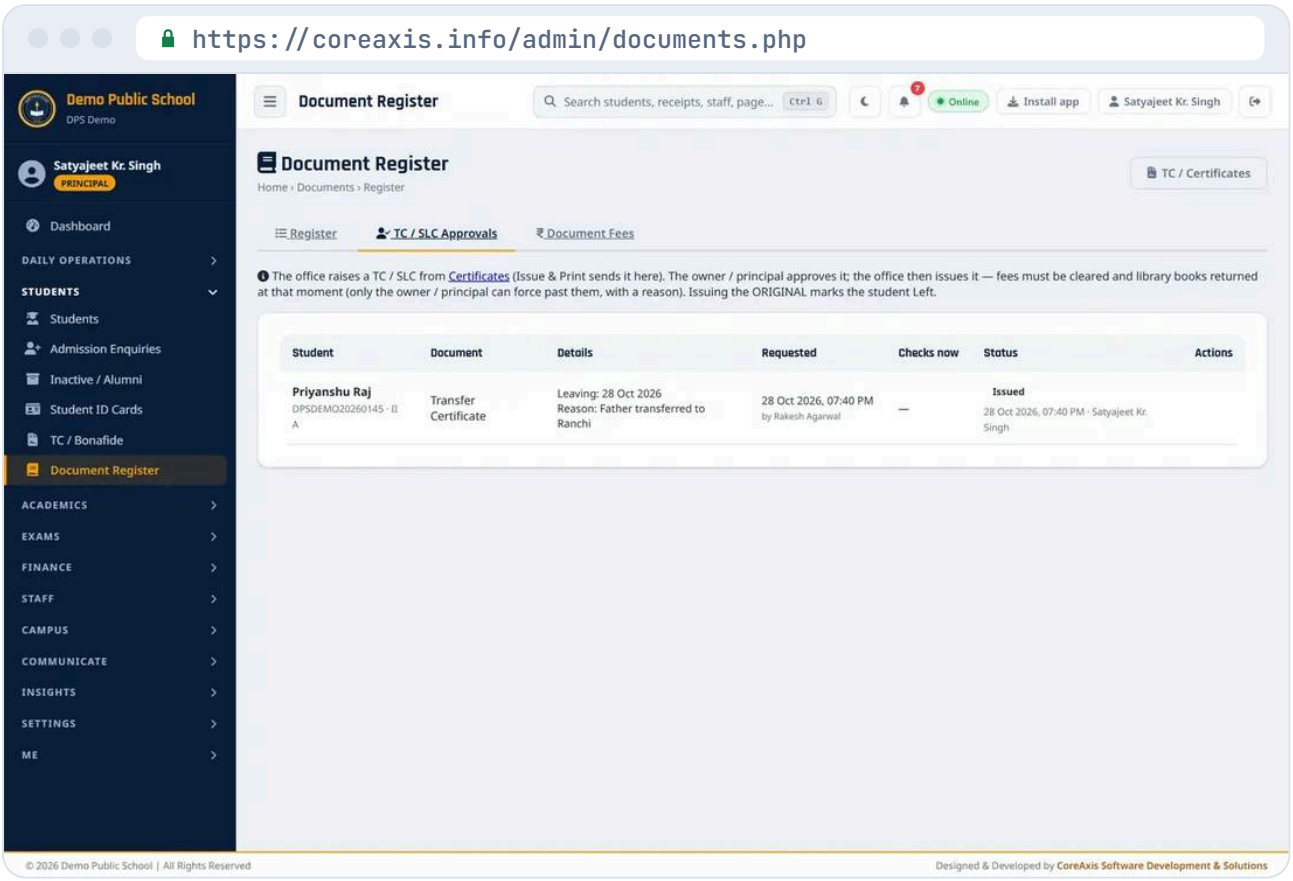
Revoke needs a reason.

3 Click **Confirm**. The status changes to **Revoked** and any unpaid copy fee is dropped.

IMPORTANT Revoking cannot be reversed. Issue a fresh document after correcting the student's details.

Approve TC / SLC requests

1. Click the **TC / SLC Approvals** tab. A number on the tab shows how many requests are waiting.



Each request shows the checks that are still failing.

2. Read **Checks now**: fee dues not cleared or library books not returned are listed in red.

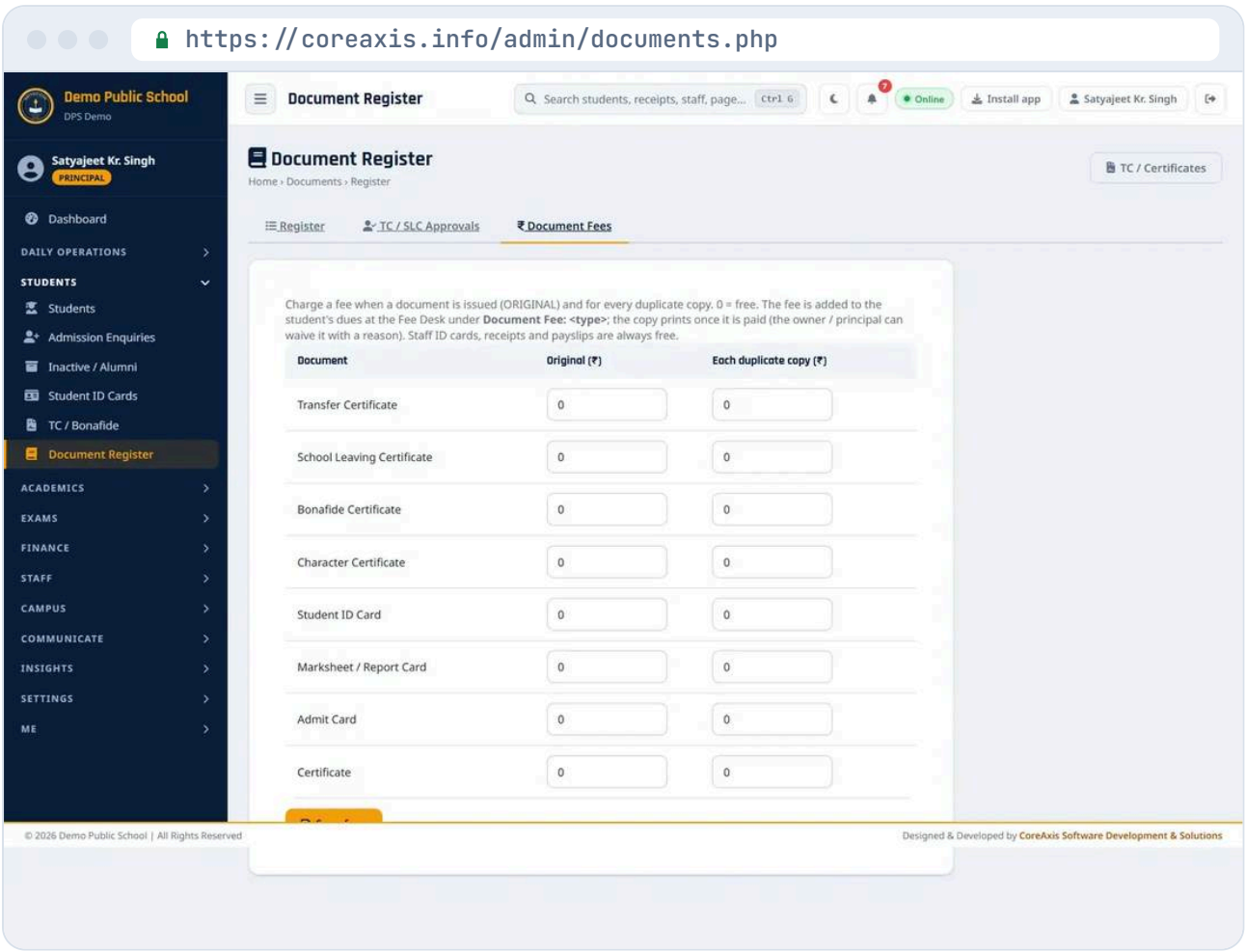
3. Click **Approve** (optional note) or **Reject** (reason required), then **Confirm**.

4. After approval the office clicks **Issue now** to open the TC and issue it once fees and books are cleared.

TIP The person who raised a request, or the Admin / Principal, can cancel it with the ban icon.

Set document fees

1 Click the **Document Fees** tab.



Blank or 0 means free.

2 For each document type type the fee for the **Original (₹)** and for **Each duplicate copy (₹)**, for example Transfer Certificate 0 and 100.

3 Click **Save fees**.

TIP The fee is added to the student's dues at the Fee Desk as **Document Fee: <type>**. Staff ID cards, fee receipts and payslips are always free.

Screen at a glance

Ref No / Code	Reference number (for example TC/2026/00037) and the 12-character verify code printed under the QR code.

Document	Type badge, title, student and admission number; 'left' after a TC / SLC.
Issued	Date and time of the original, and who issued it.
Copies	Number of office copies and digital copies (portal / app downloads).
Status	Valid, Revoked, Fee pending, or Forced (rule overridden).
Actions	Copies (history), Reprint (next duplicate), Revoke (Admin / Principal).
Type filter	Transfer Certificate, School Leaving Certificate, Bonafide, Character, Student ID Card, Marksheet / Report Card, Admit Card, Certificate, Staff ID Card, Fee Receipt, Salary Payslip.
Status filter	All, Valid, Revoked, Fee pending, Forced (rule overridden).

Questions

Some old documents say '(issued before the register)'.

These were issued before the register was switched on. They are listed for the record; new copies are counted from now.

Why does a fee receipt appear with digital copies?

Each time a parent downloads a receipt or report card from the portal or app, a DIGITAL COPY is logged against it.

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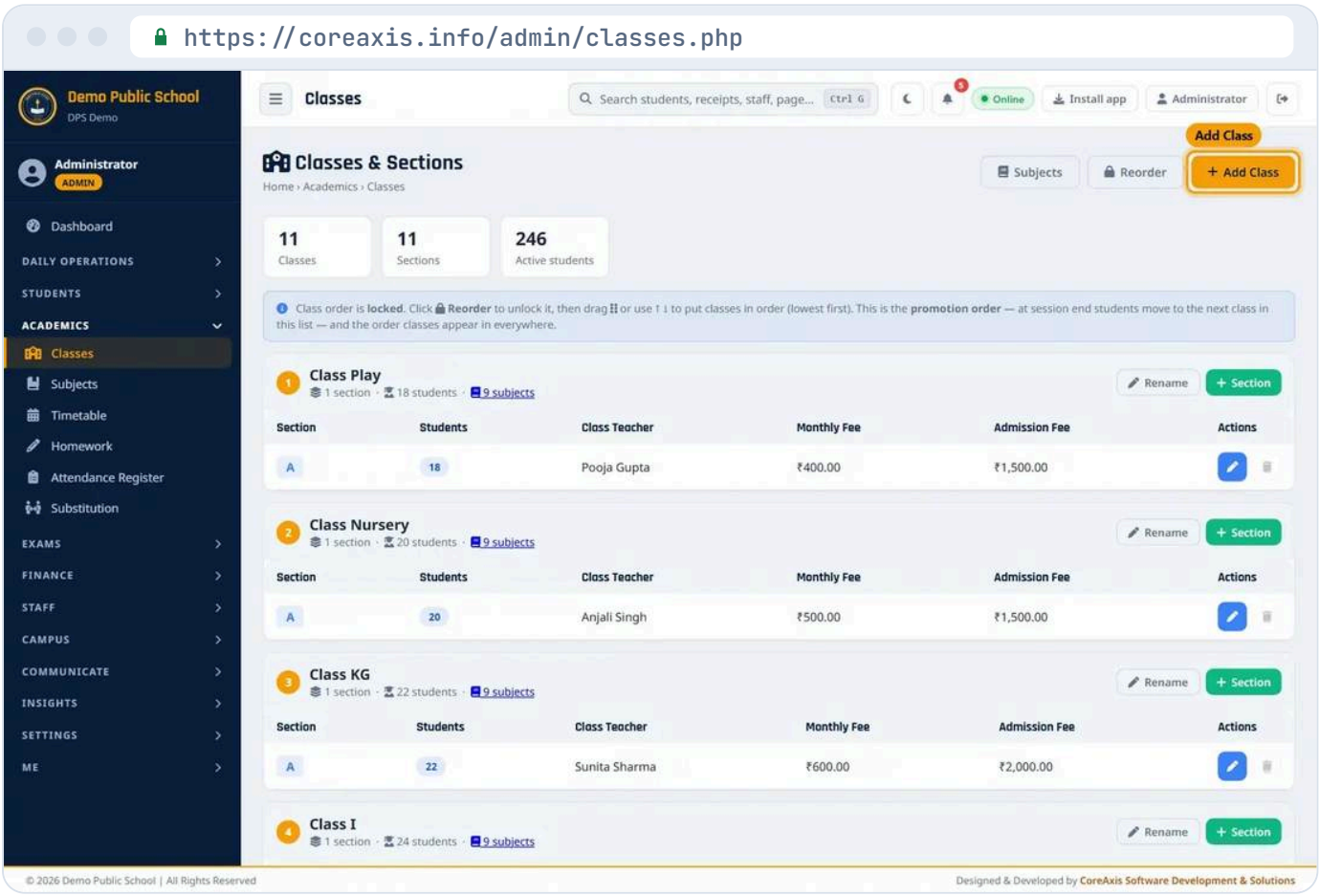
ACADEMICS · CHAPTER 11

Classes

Admin Principal MENU Academics › Classes

The Classes page lists every class of the school with its sections, student count, class teacher, monthly fee and admission fee. The order of the list is the promotion order: at session end, students move to the next class in this list. Fees set here feed the Fee Desk and fee dues; the class teacher set here decides who can mark attendance and enter marks for that section. Every action on this page first asks you to confirm in a popup, so nothing changes by a stray click.



Classes — Demo Public School

Screen at a glance

Classes / Sections / Active students	Three counters at the top: how many classes, how many sections in all, and how many active students are enrolled.

Lock note	The blue note reminds you that the class order is locked. It can only be changed after you click Reorder.
Class card	One card per class, numbered in promotion order (1 = lowest class). The line under the name shows the number of sections, students and subjects. Click the subjects link to open Subjects filtered to that class.
Rename	Renames the class for all its sections. Students, fees and subjects stay as they are.
+ Section	Adds another section (B, C …) to the class with the same fees, subjects and promotion order.
Section table	Columns: Section, Students, Class Teacher, Monthly Fee, Admission Fee, Actions.
Edit (pencil)	Opens the section's form: section name, monthly fee, admission fee and class teacher.
Delete (bin)	Deletes an empty section. The bin is greyed out with the hint "Cannot delete: has students" while the section has any students, including students who have left.
Subjects (top right)	Opens the Subjects page.
Reorder	Unlocks the class order so you can drag classes or use the ↑ ↓ arrows.
Add Class	Opens the form to create a new class with one or more sections.

Add a class (example: Class IX, section A, ₹1,200 a month)

Demo Public School is opening Class IX next session. Rajesh Kumar Verma will be its class teacher.

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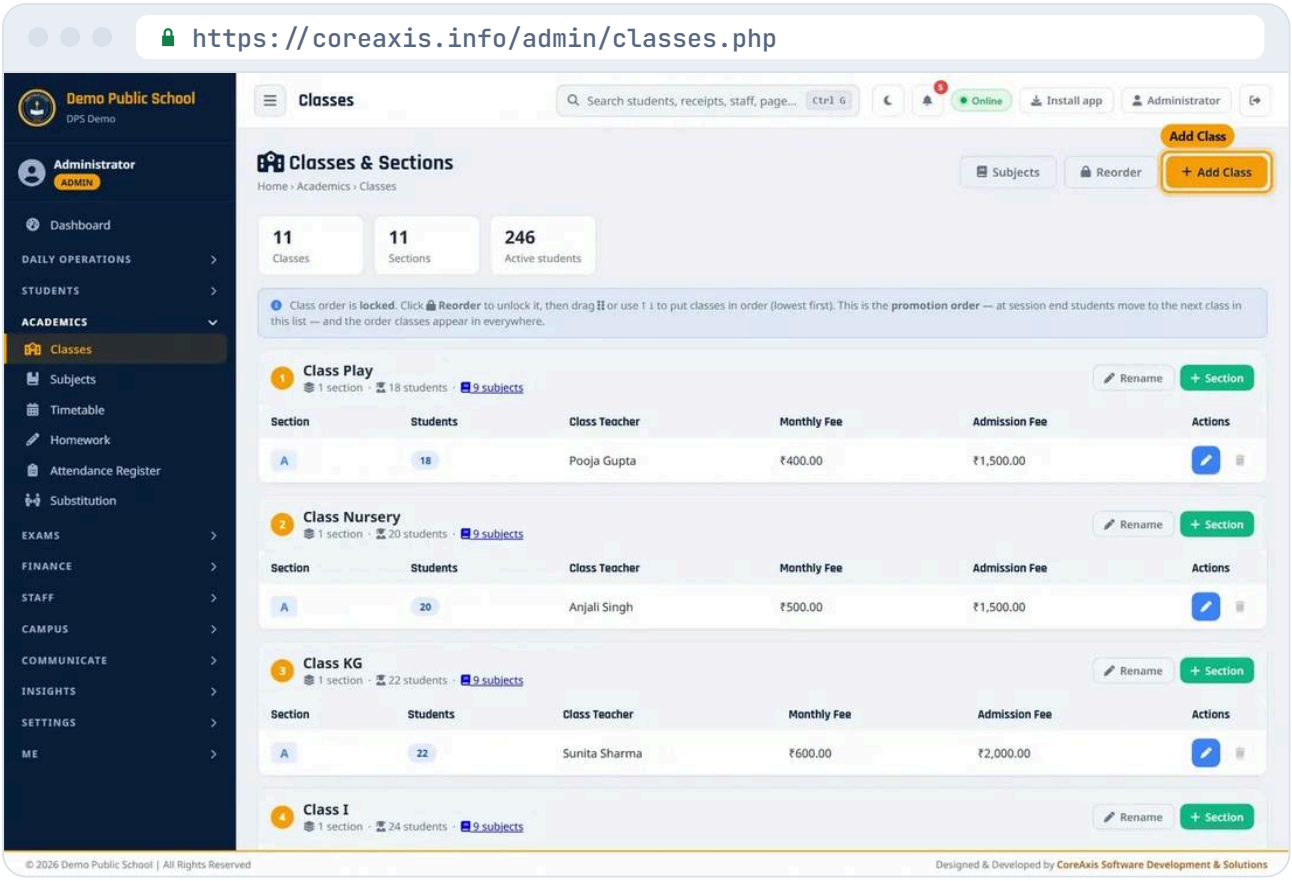
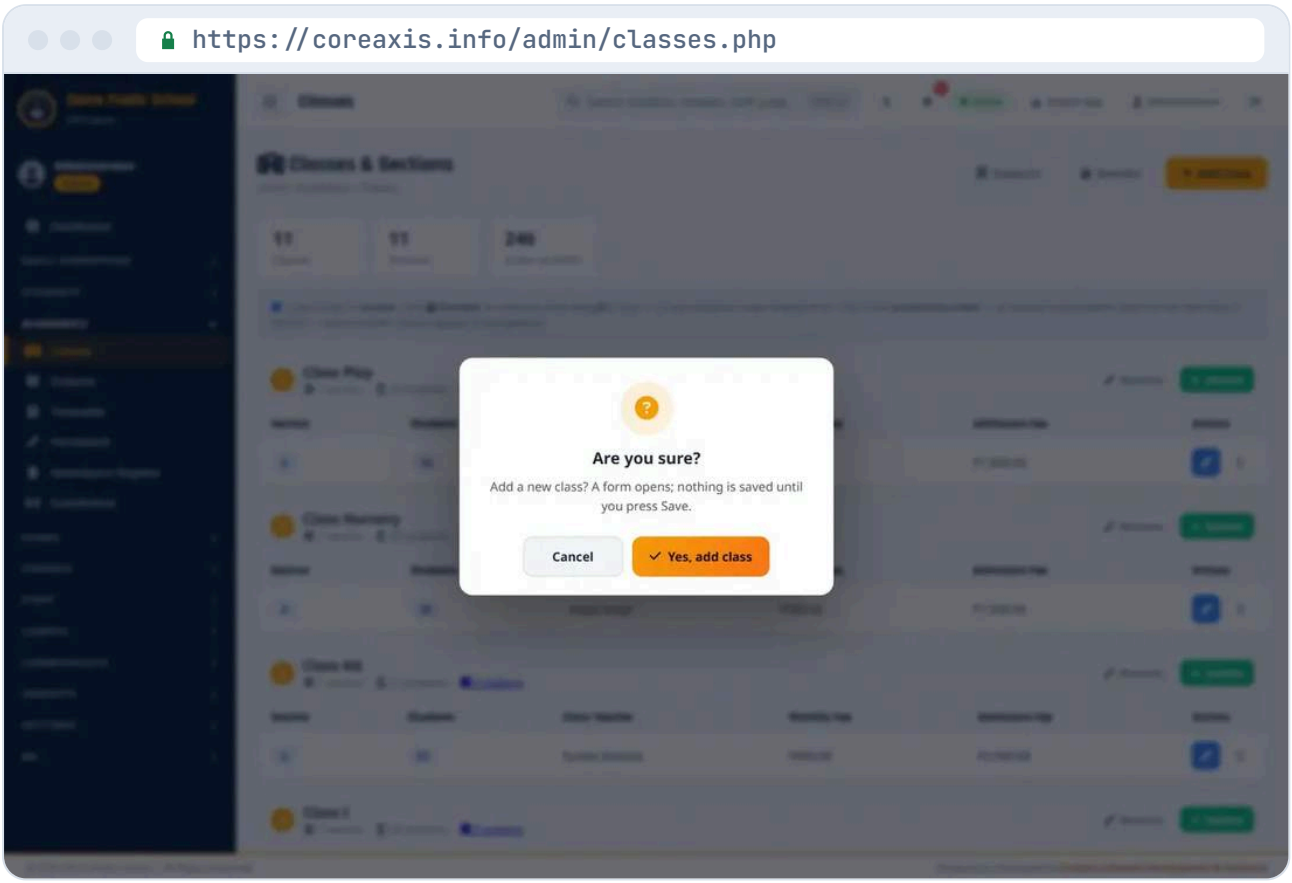
1 Open **Academics › Classes** and click **Add Class** at the top right.



The Classes page with the Add Class button.

2 A confirmation popup asks "Add a new class?". Click **Yes, add class**. The form opens; nothing is saved yet.



Every action on this page starts with a confirmation popup.

3 Type **IX** in **Class Name**.

4 Under **Sections**, keep **A** ticked. Tick more letters if the class starts with more sections, or type a name such as Rose in **Other name**.

5 Enter **1200** in **Monthly Fee (₹)** and **3000** in **Admission Fee (₹)**.

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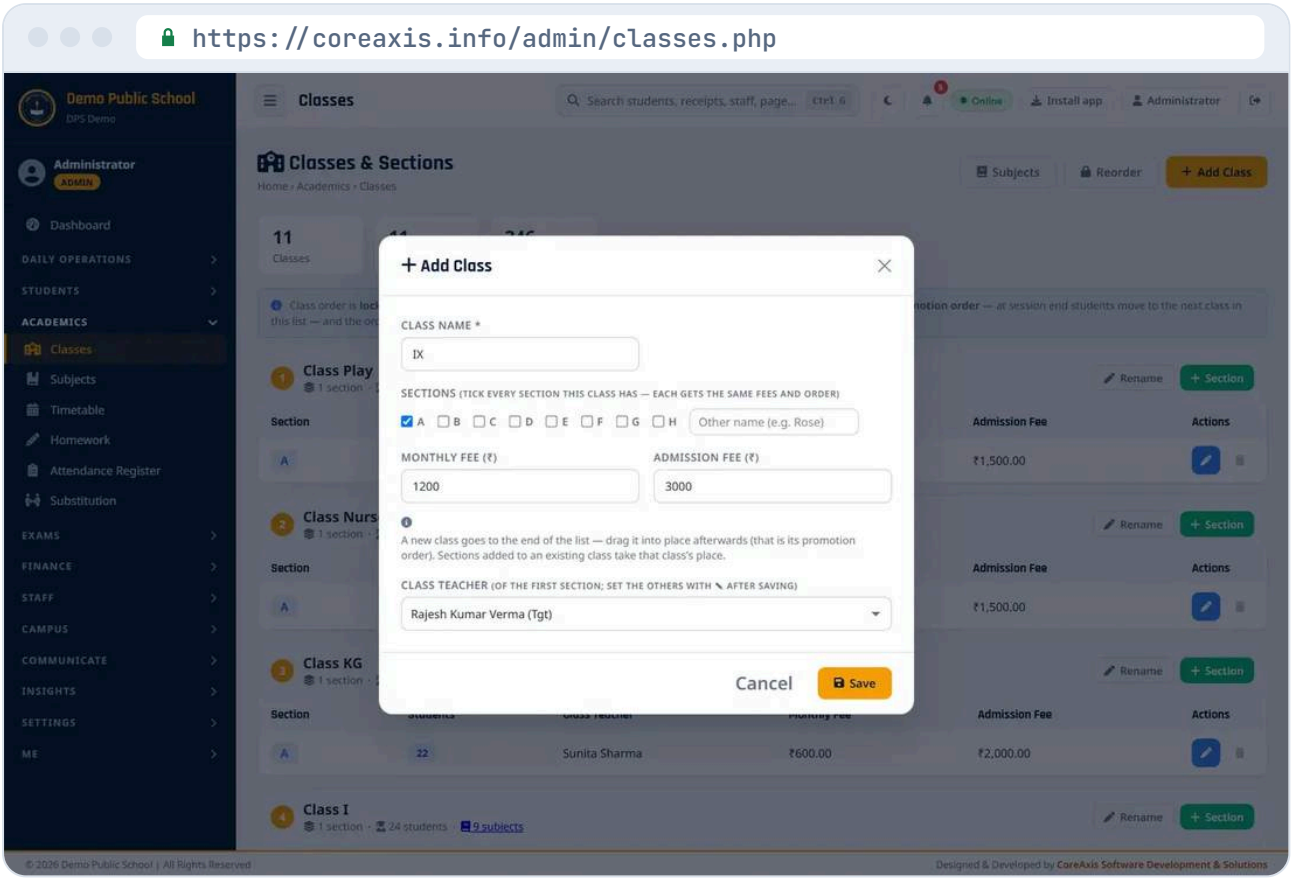
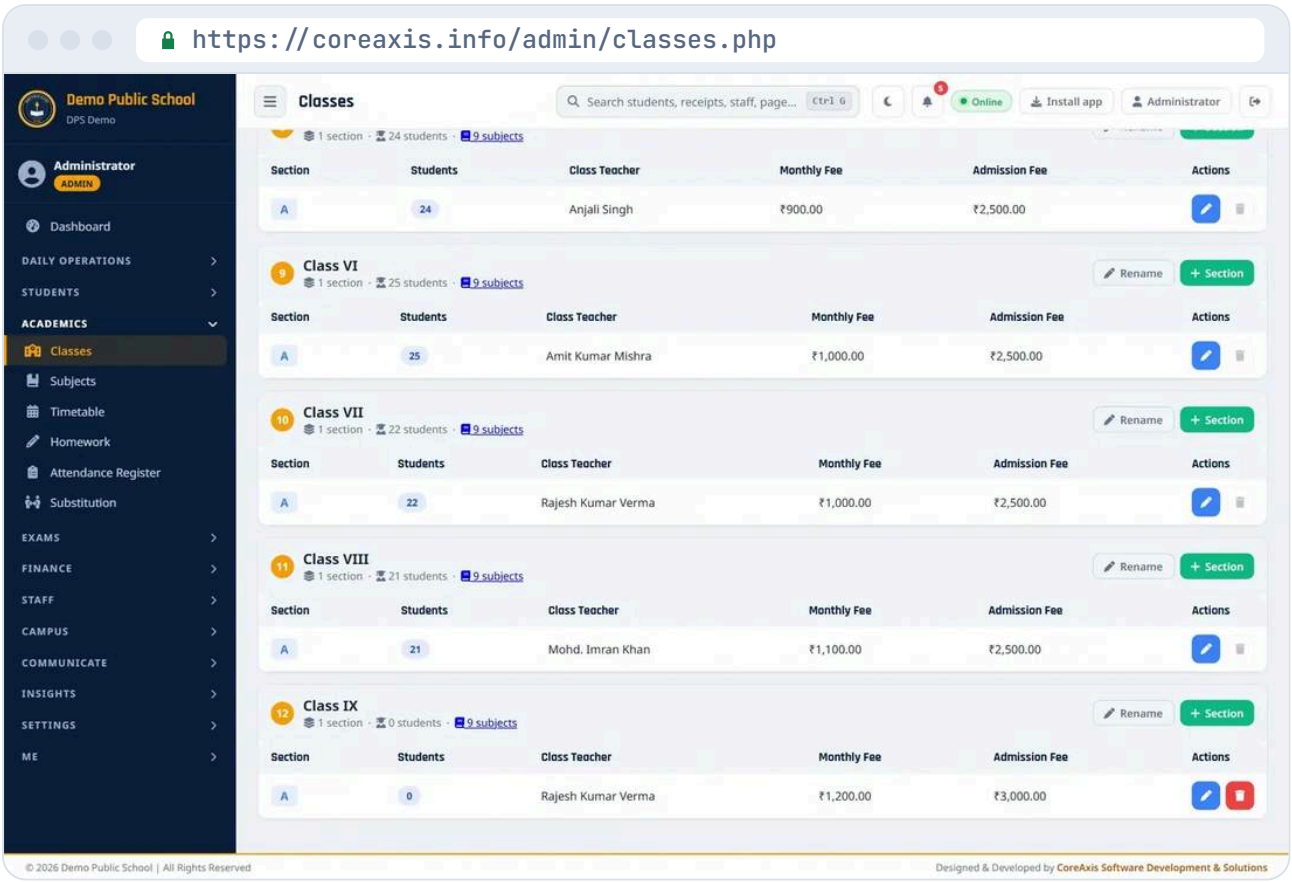
6 Pick **Rajesh Kumar Verma** in **Class Teacher**.



The Add Class form filled in for Class IX.

7 Click **Save**, then **Yes, add** in the popup. The message "Class IX: section A added." appears and Class IX is added at the end of the list.



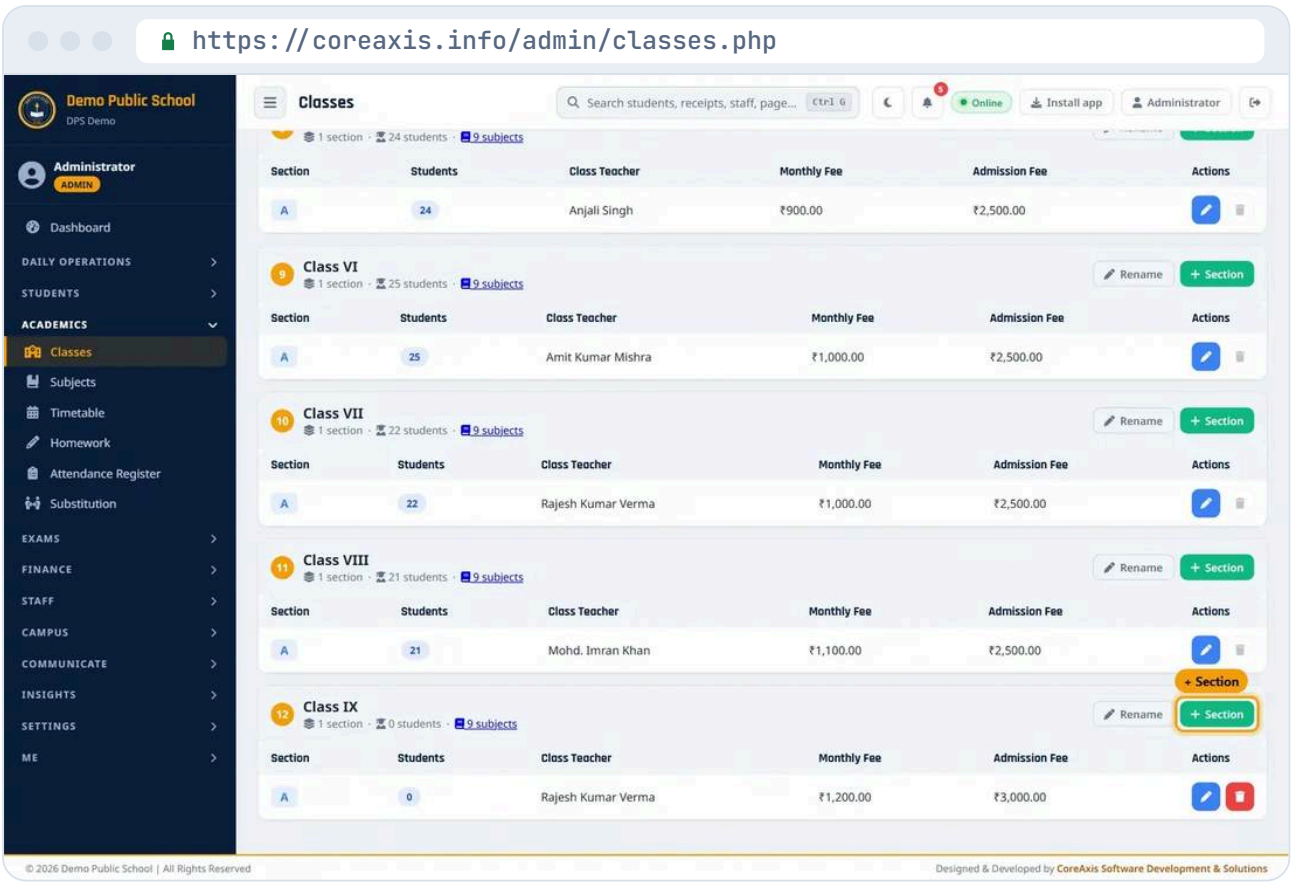
Class IX appears as class 12 with 0 students.

TIP A new class always goes to the end of the list. If it does not belong at the end, use Reorder to move it (see below).

TIP Subjects marked "All classes" are added to the new class on their own. Class IX shows 9 subjects straight away.

Add a section (example: Class IX – B with Mohd. Imran Khan as class teacher)

1. On the Class IX card, click **+ Section**.

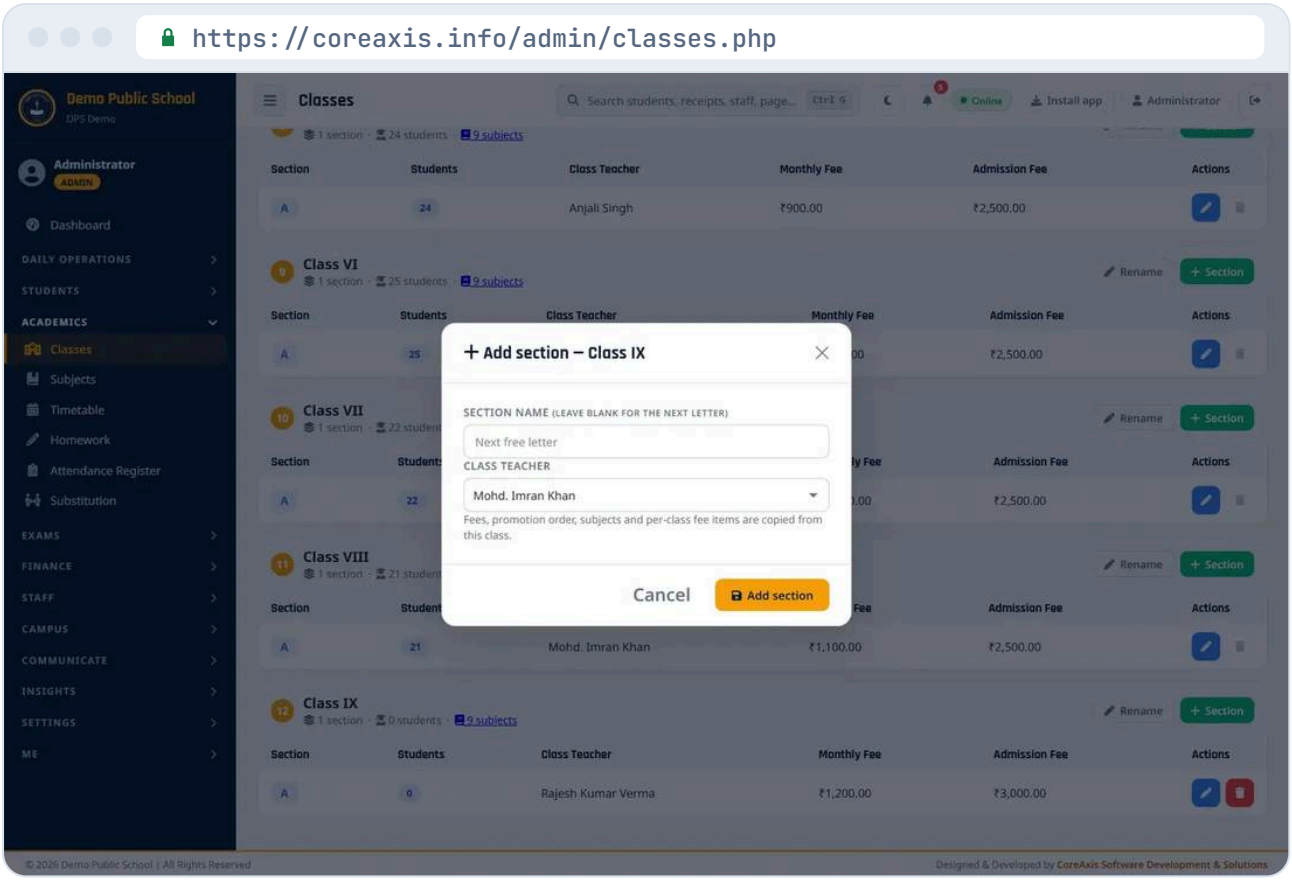


The + Section button on the class card.

2. Click **Yes, add section** in the popup.

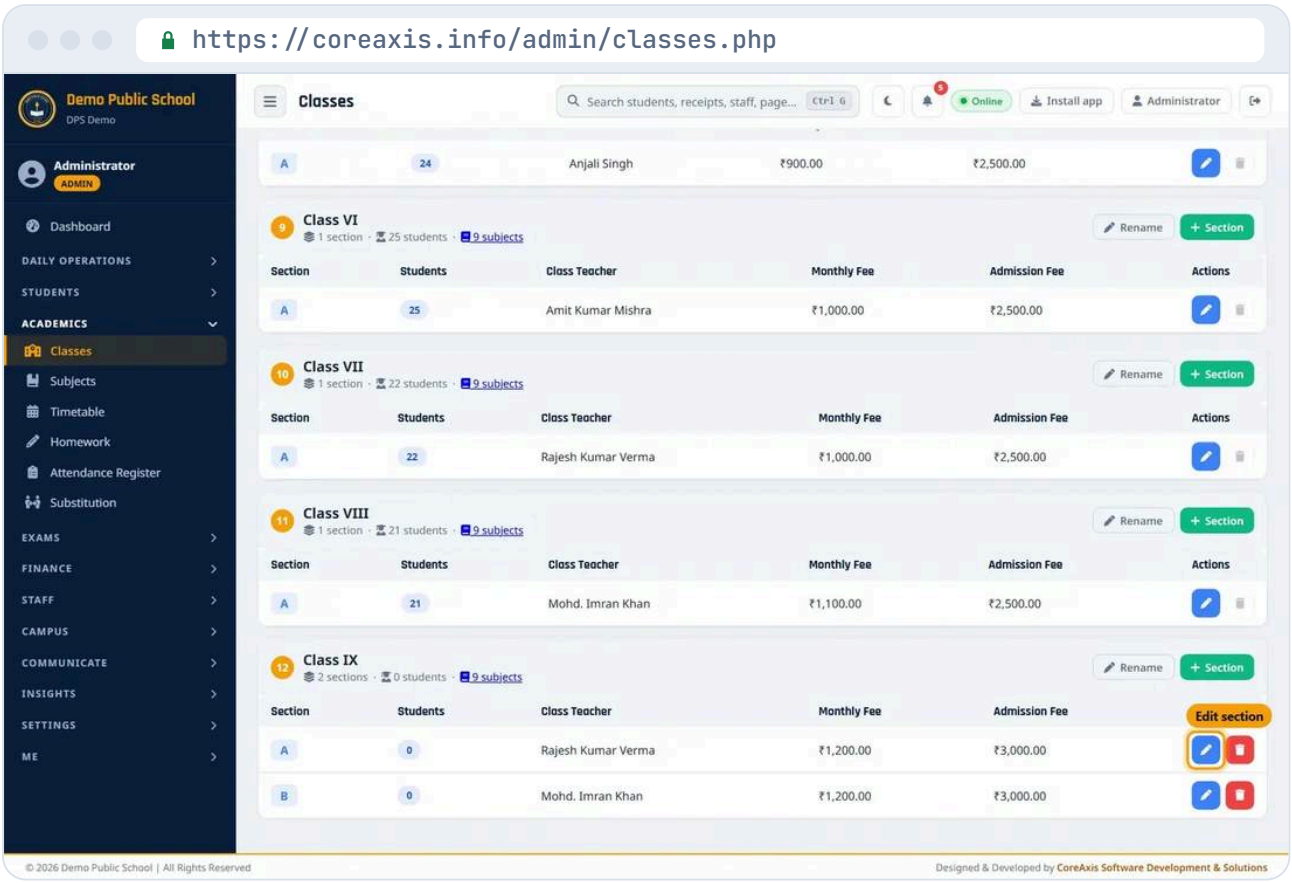
3. Leave **Section name** blank to get the next free letter (B), or type a name.

4 Pick **Mohd. Imran Khan** in **Class Teacher**.



Fees, promotion order, subjects and per-class fee items are copied from the class.

5 Click **Add section**, then **Yes, add**. The message "Section B added to Class IX — same fees, promotion order and subjects as section A." appears.



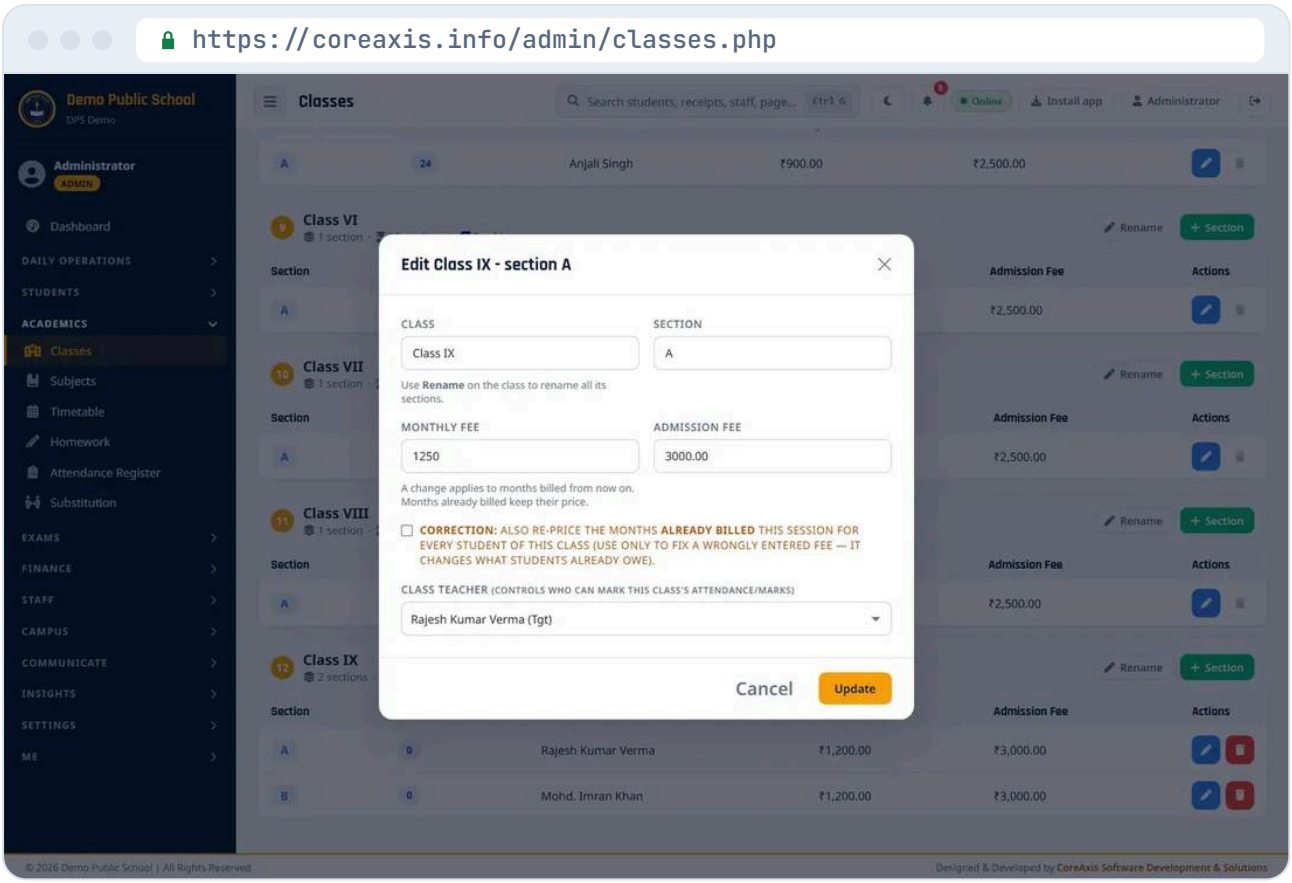
Class IX now has sections A and B.

Edit a section: class teacher and fees (example: Class IX – A)

1 In the section row, click the blue pencil (**Edit section**).

2 Click **Yes, edit** in the popup. The **Edit Class IX - section A** form opens.

3 Change **Monthly Fee**, **Admission Fee** or **Class Teacher** as needed. In the example the monthly fee is changed from 1200 to **1250**.



The Edit section form.

4 Click **Update**, then **Yes, save** in the popup.

TIP A new monthly fee applies to months billed from now on. Months already billed keep their old price.

TIP The **Correction** box (it appears as soon as you change the monthly fee) also re-prices months already billed this session. Use it only to fix a wrongly entered fee. It changes what students already owe, so the app asks you once more before saving.

TIP The class teacher controls who can mark the section's attendance and enter its marks. A teacher sees only the classes they are class teacher of.

TIP To rename the whole class (all sections), use **Rename** on the class card, not this form.

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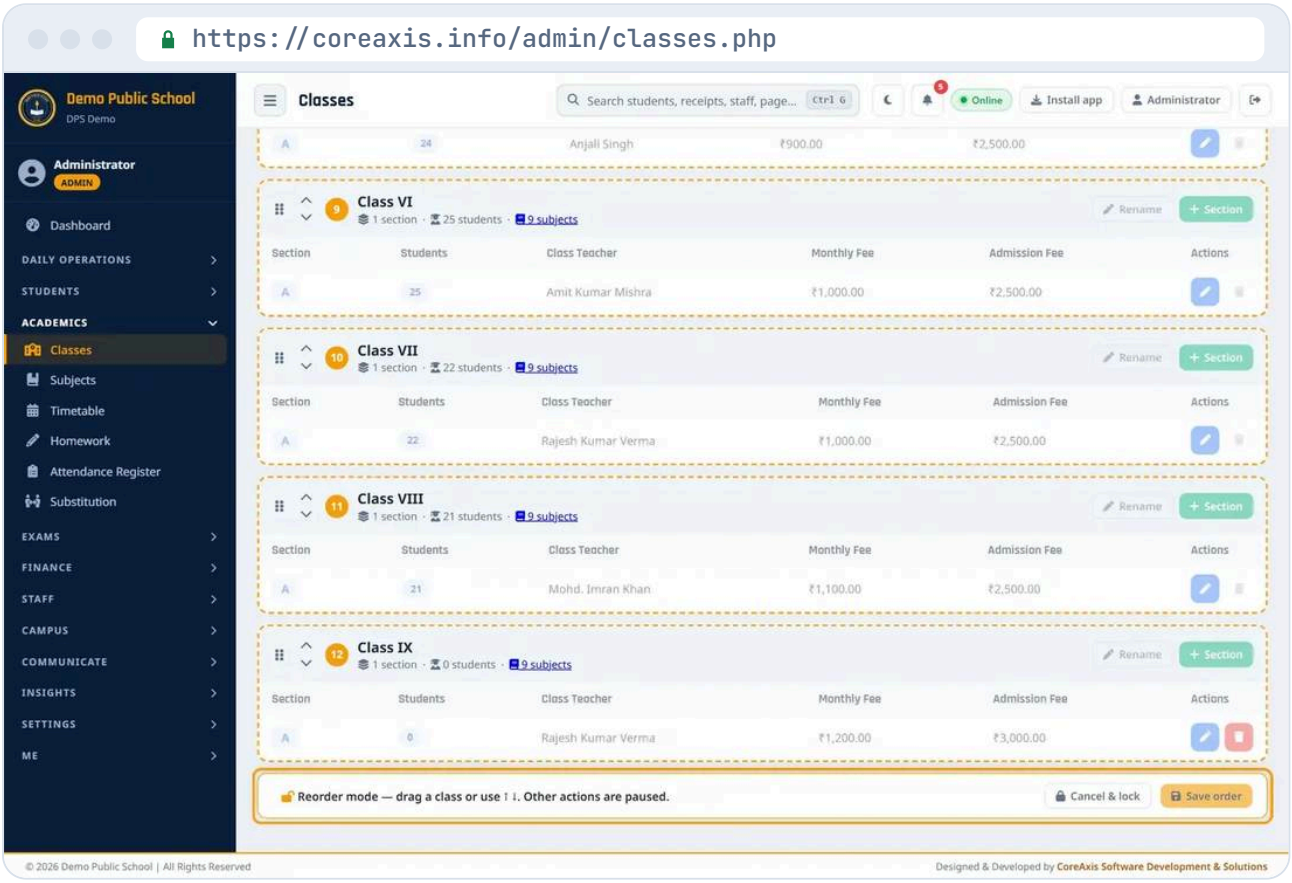
Change the class order (promotion order)

The order on this page is used everywhere classes are listed, and at session end each class is promoted to the class below it.

1. Click **Reorder** at the top right and **Yes, unlock** in the popup.
2. Drag a class by its grip handle, or click the ↑ ↓ arrows next to its number. Other actions on the page are paused while you reorder.
3. Check the bar at the bottom of the page. Click **Save order** to keep the new order, or **Cancel & lock** to throw it away.



Reorder mode: dashed class cards and the Save order bar.

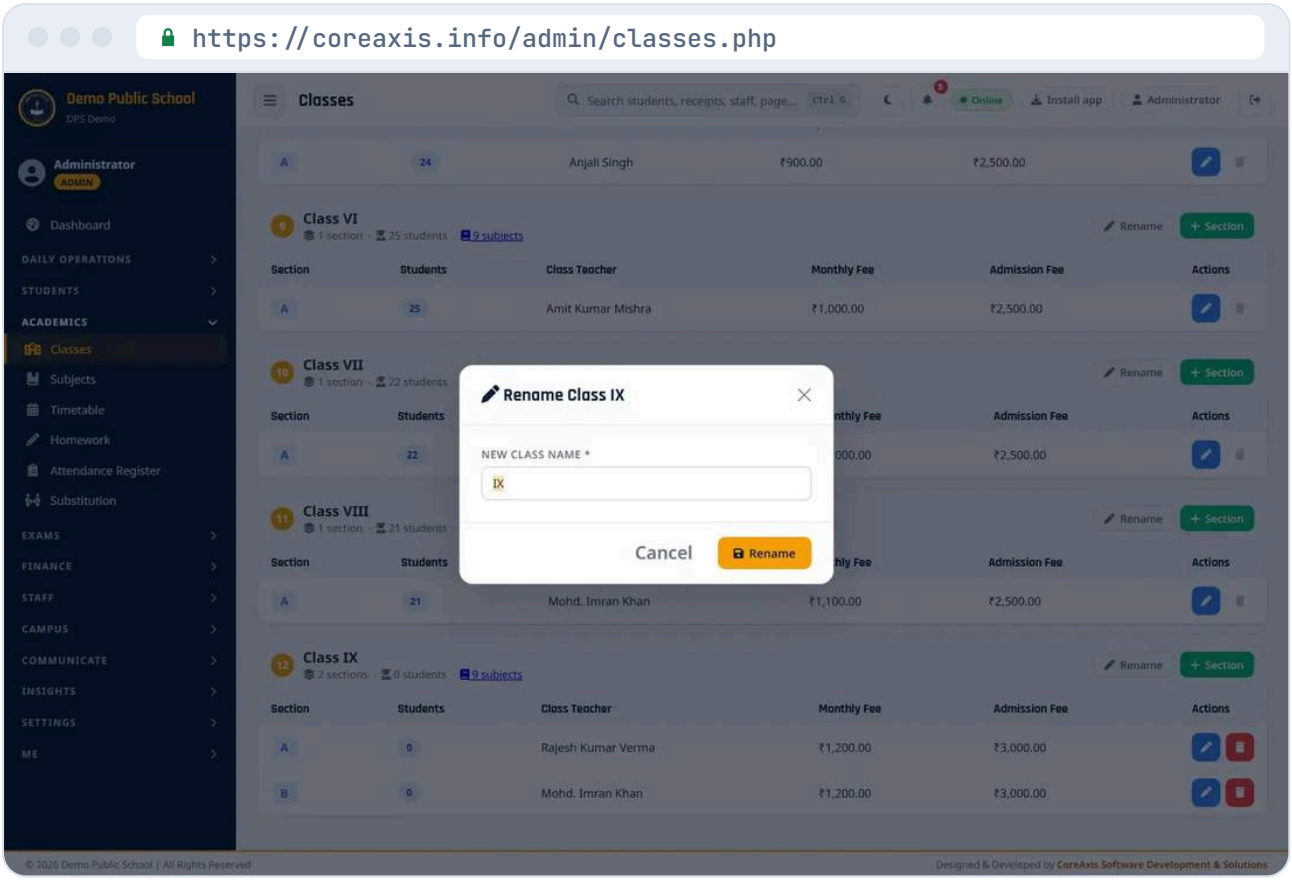
4. Confirm in the popup. The message lists the new order, for example Play → Nursery → KG → … → IX.

IMPORTANT Promotion at session end follows this order. Put the lowest class first and check the order before you save.

Rename a class

1. On the class card, click **Rename** and confirm with **Yes, rename**.

2 Type the new name and click **Rename**, then confirm.



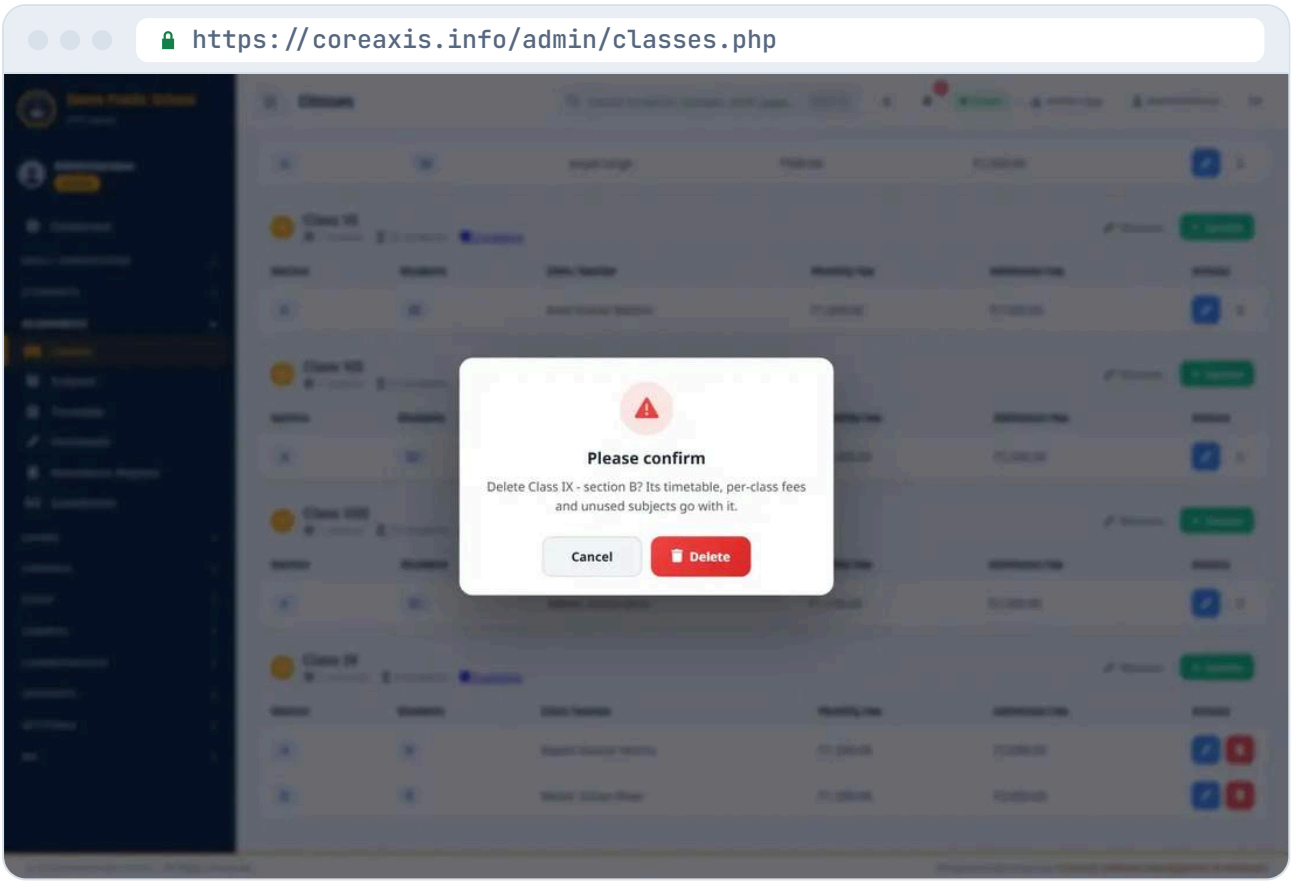
Renaming changes the name of all sections at once.

TIP Two classes cannot have the same name. The app stops you with a message if the name is already used.

Delete an empty section (example: Class IX – B)

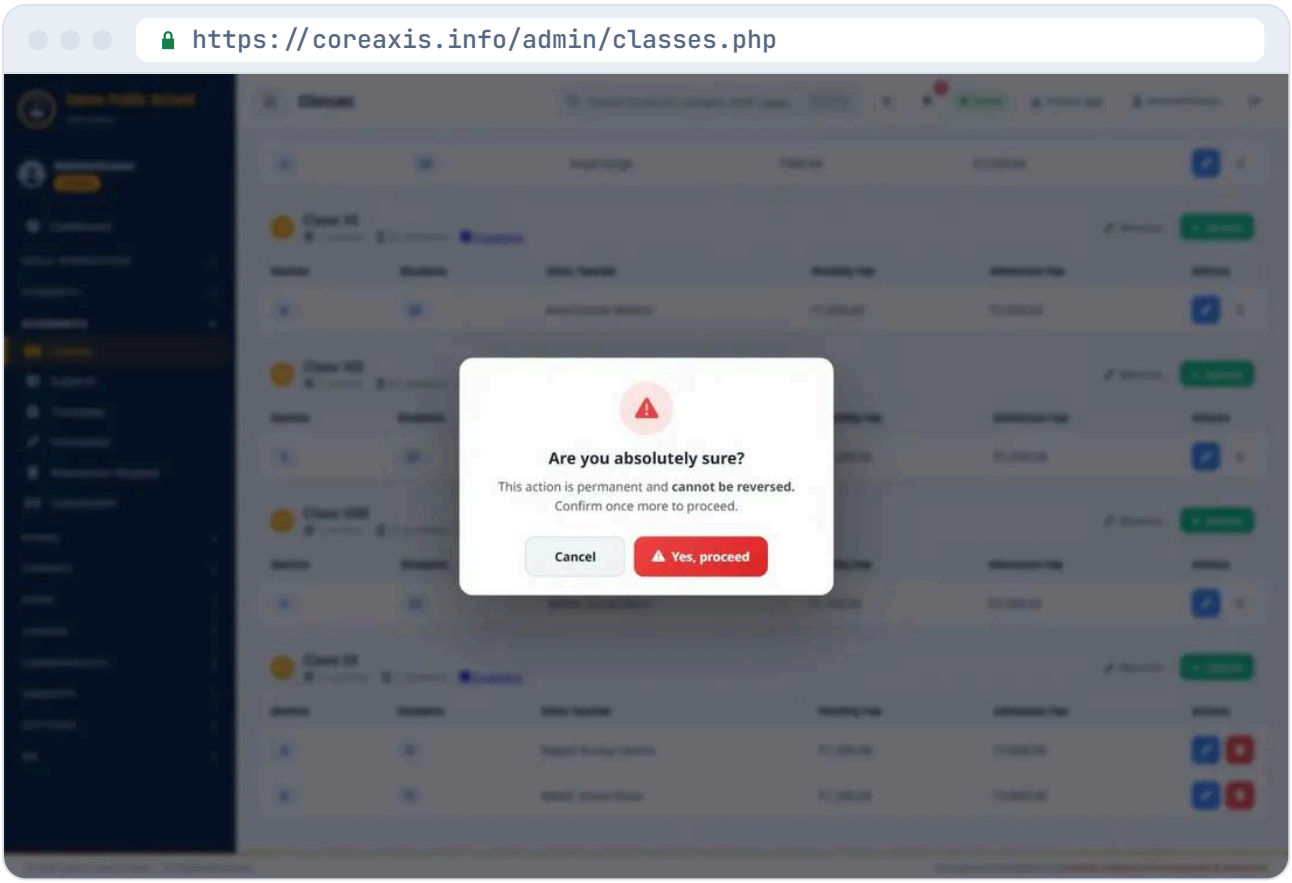
1 Click the red bin in the section row. The bin works only for a section with no students.

2 Read the first warning: the section's timetable, per-class fees and unused subjects go with it. Click **Delete**.



First warning.

3 A second warning asks "Are you absolutely sure?". Click **Yes, proceed**. The message "Section deleted." appears.



Deleting asks twice.

IMPORTANT Deleting a section cannot be reversed. A section that has ever had students (including students who left) cannot be deleted — their records keep the class.

Questions

The Delete button of a section is grey. Why?

The section has students (active or left). Move the active students to another section first. Sections with past students stay, so their old records keep the class name.

We raised the Class V fee from ₹900 to ₹950. Will old months change?

No. The new fee applies to months billed from now on. Only tick the Correction box if the old fee was entered wrongly and you want every billed month re-priced.

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Where do I assign subjects to a class?

On the Subjects page. Click the "9 subjects" link on a class card to open Subjects filtered to that class.

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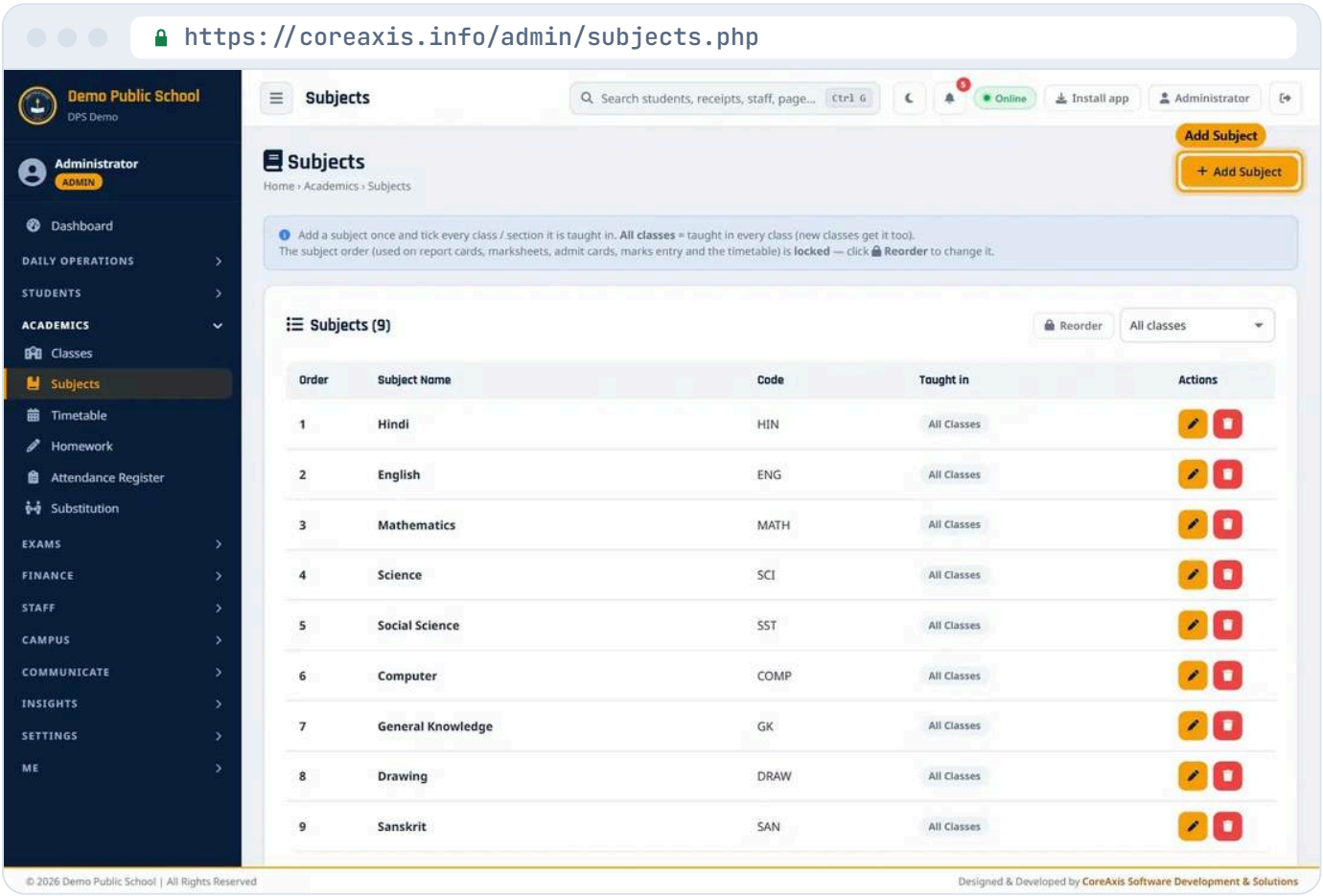
ACADEMICS · CHAPTER 12

Subjects

Admin Principal MENU Academics › Subjects

A subject is added once and then ticked for every class or section that studies it. A subject set to All classes is taught in every class, including classes added later. The subject order set here is used on report cards, marksheets, admit cards, marks entry and the timetable. Teachers are linked to subjects through the Timetable: the teacher you put in a period is the teacher of that subject for that class.



Subjects — Demo Public School

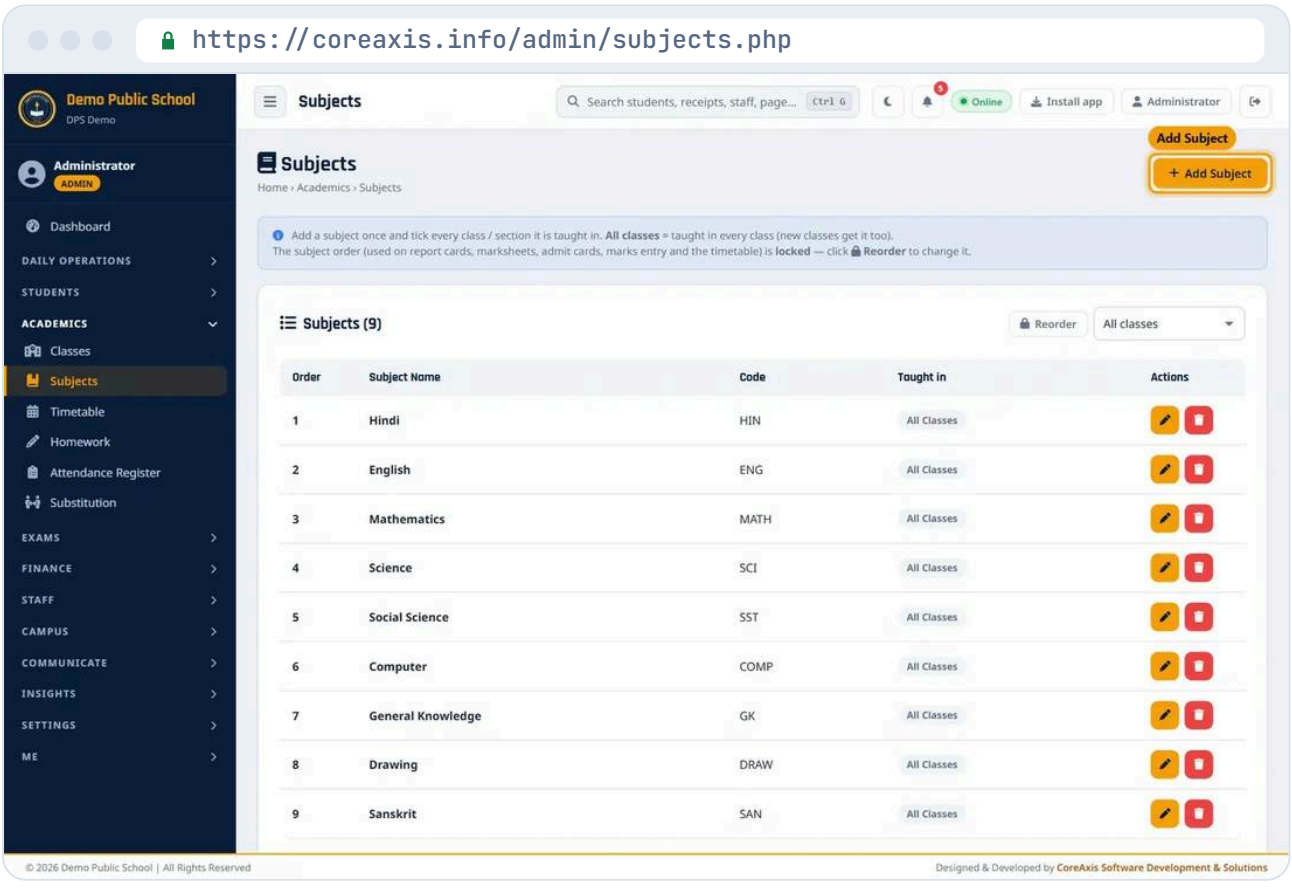
Screen at a glance

Add Subject	Opens the form to create a subject and choose where it is taught.
Subjects (n)	How many subjects the school has (or the selected class has, when filtered).

Reorder	Unlocks the subject order. Shown only when the list is not filtered by class.
Class filter	All classes, or one class, to see only the subjects taught in that class.
Order	Position of the subject on report cards, marks entry and admit cards.
Subject Name / Code	Full name and short code (for example Mathematics / MATH). The code prints on admit cards.
Taught in	All Classes, or one chip per class / section.
Actions	Pencil = Edit / assign classes. Bin = Delete.

Add a subject for some classes (example: Moral Science for Play to Class II)

1. Open **Academics › Subjects** and click **Add Subject**.



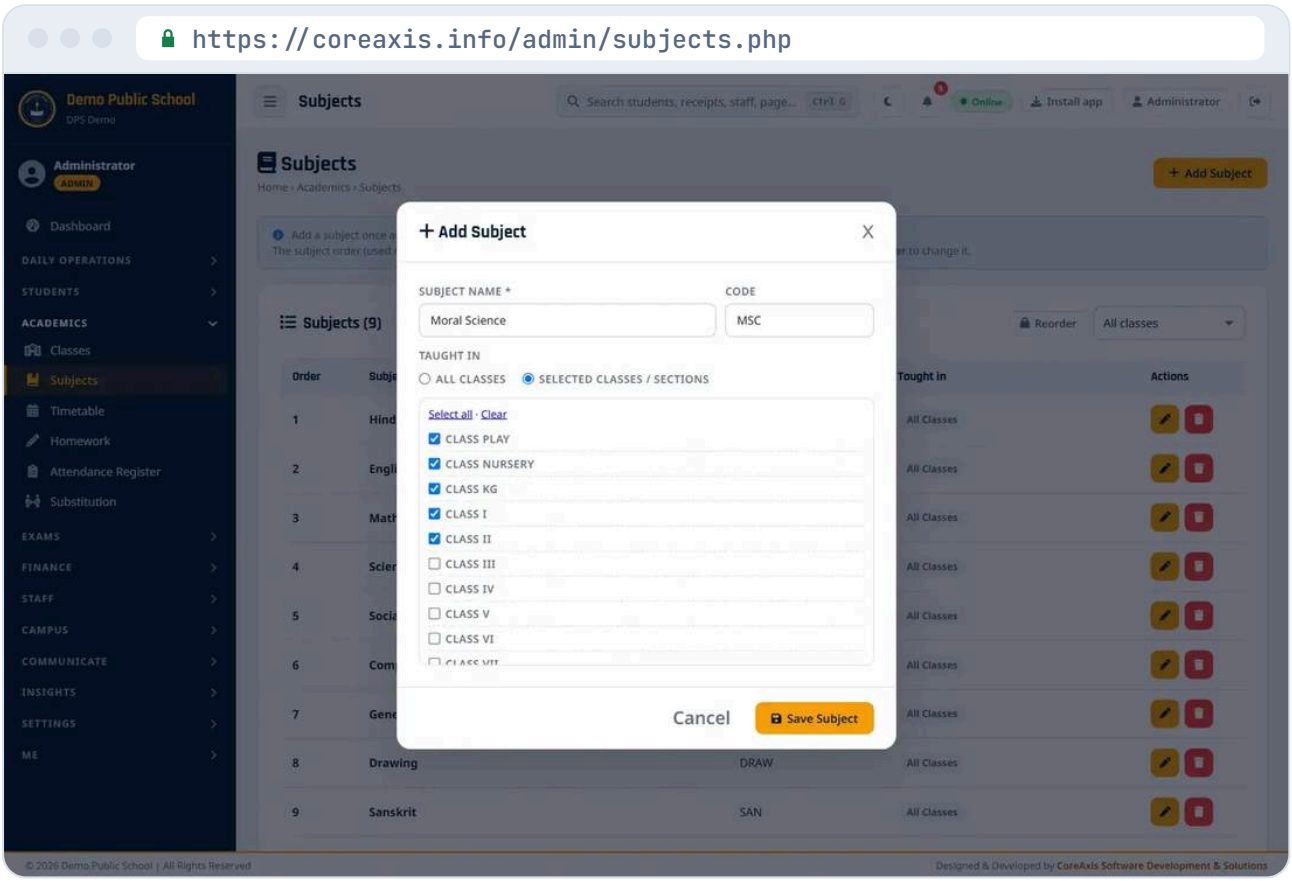
The subject list. The order is locked.

2. Click **Yes, add subject** in the popup.

3. Type **Moral Science** in **Subject Name** and **MSC** in **Code**.

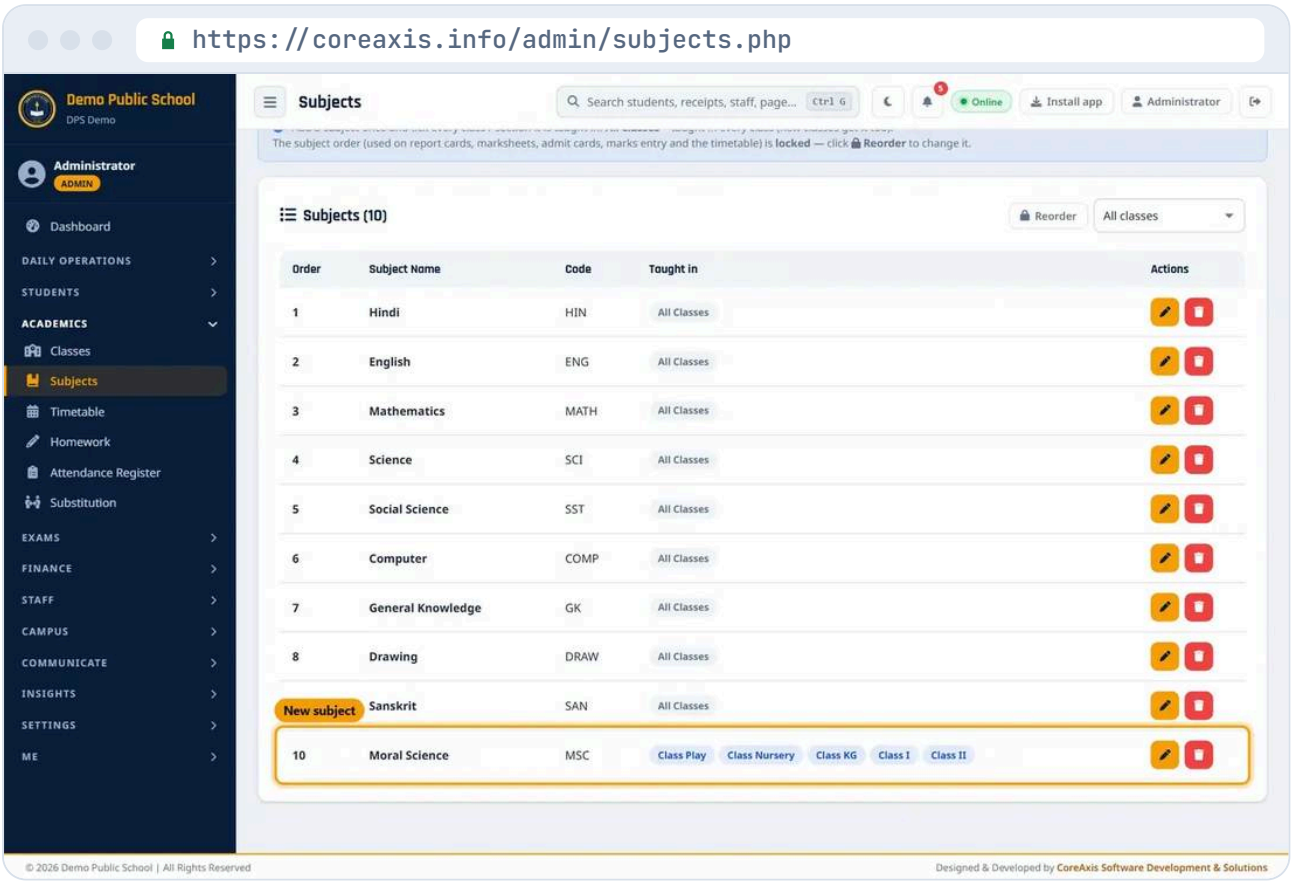
4. Under **Taught in**, choose **Selected classes / sections**.

5. Tick **Class Play**, **Class Nursery**, **Class KG**, **Class I** and **Class II**. For a class with several sections, tick the class to select all its sections, or tick single sections.



The Add Subject form with five classes ticked.

6 Click **Save Subject**, then **Yes, save** in the popup. The message "Subject 'Moral Science' saved." appears.



Moral Science is added at position 10 with chips for its five classes.

TIP Choose **All classes** for subjects that every class studies (Hindi, English, Mathematics). New classes then get them on their own.

TIP Use **Select all** / **Clear** in the class list to tick or untick everything quickly.

Change the classes of a subject

1 Click the pencil (**Edit / assign classes**) in the subject's row and click **Yes, edit**.

2 Tick or untick classes, or switch between **All classes** and **Selected classes / sections**.

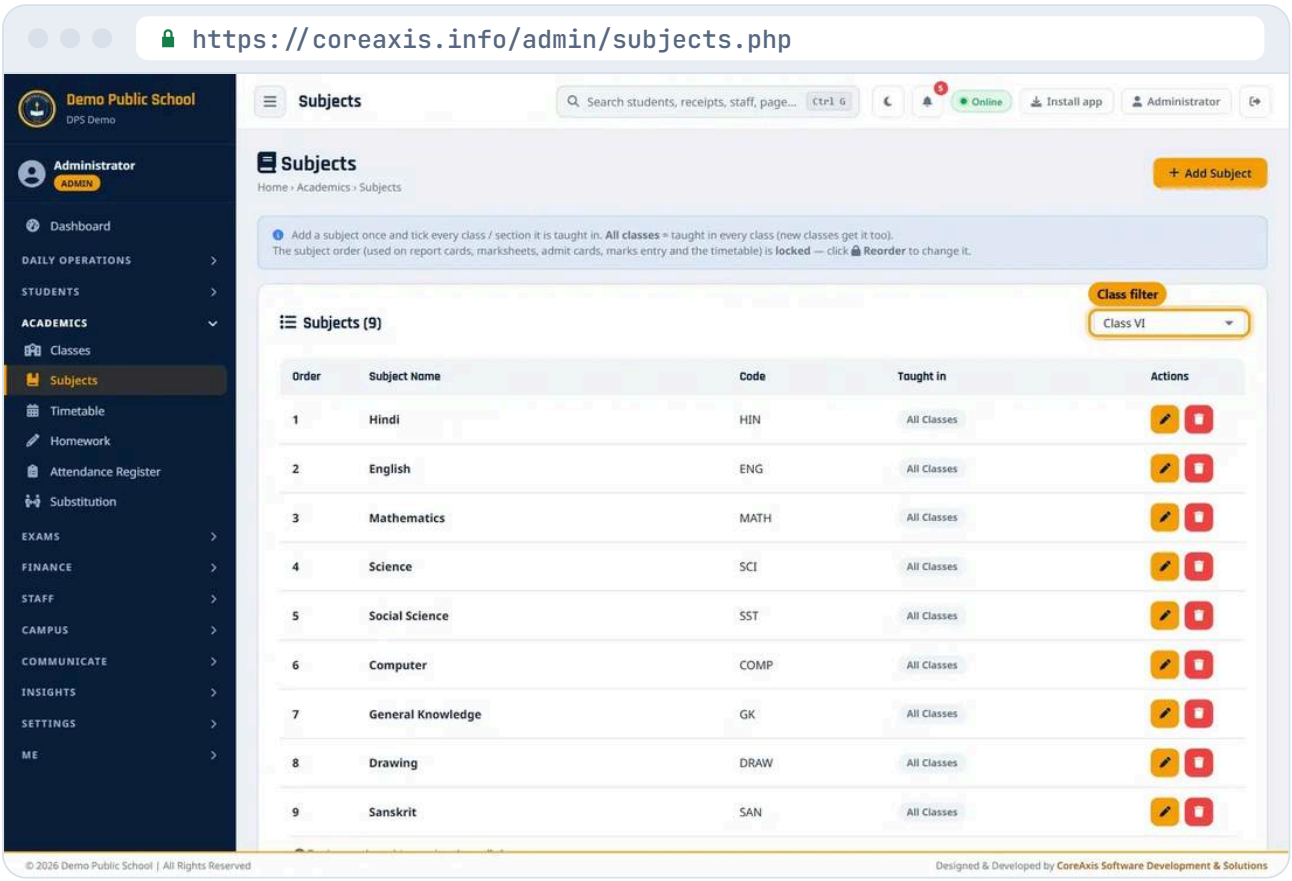
3 Click **Save Subject** and confirm.

TIP If you untick a class where the subject already has marks, timetable periods or homework, the subject is kept for that class. The message names those classes. Remove those entries first if you really want to take the subject off.

TIP A subject set to All classes that already has marks, timetable periods or homework cannot be limited to some classes. Keep it as All classes, or add a separate subject (for example Sanskrit (Opt)) for the classes that need it.

See the subjects of one class (example: Class VI)

1. Pick **Class VI** in the class filter at the top right of the list.



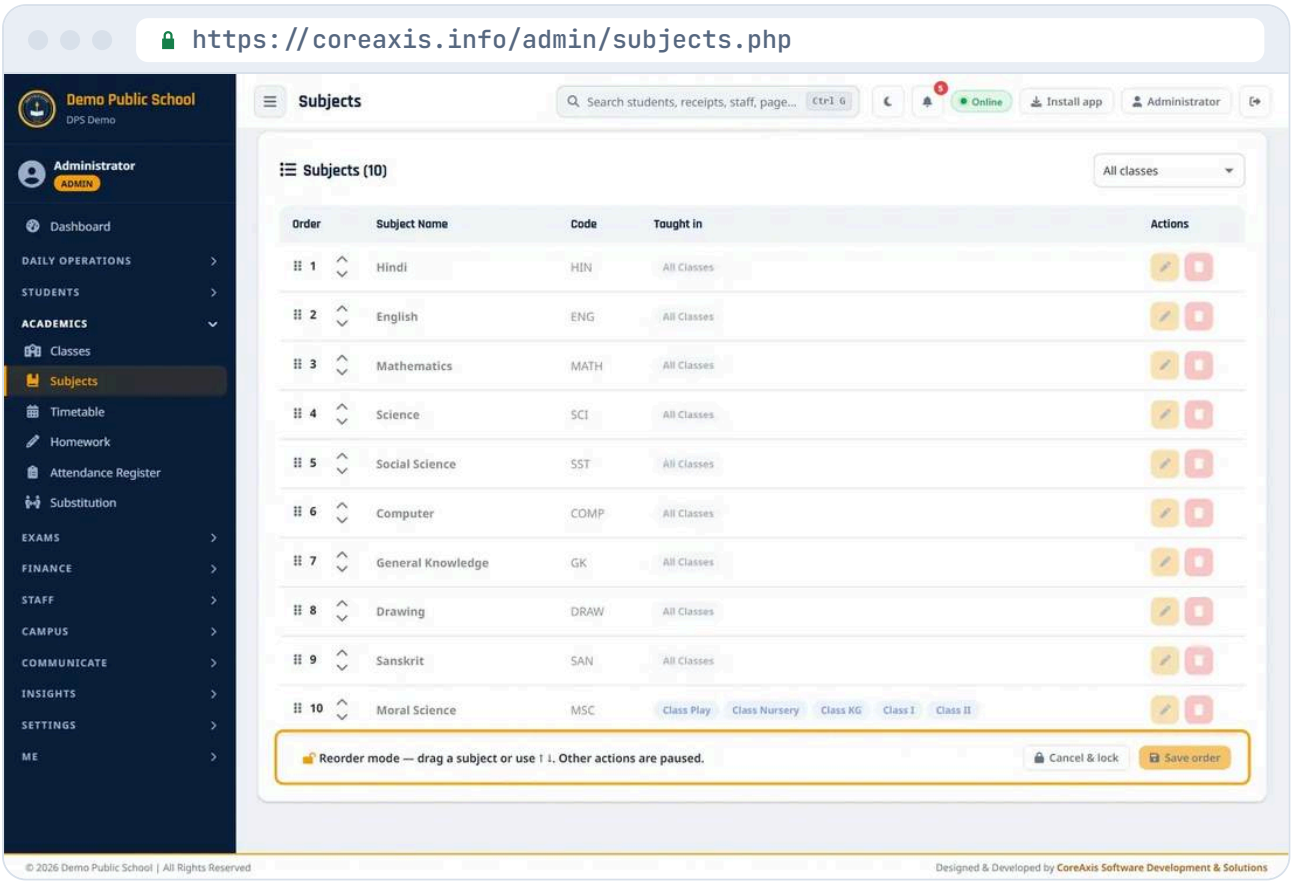
Filtered to Class VI: 9 subjects.

2. Pick **All classes** to see the full list again.

Change the subject order

1. Make sure the class filter shows **All classes**, then click **Reorder** and **Yes, unlock**.
2. Drag a subject by its grip, or use the ↑ ↓ arrows in the **Order** column.

3 Click **Save order** in the bar at the bottom (or **Cancel & lock** to undo), then **Yes, save**.



Reorder mode with the Save order bar.

TIP The new order is used at once on report cards, marksheets, admit cards, marks entry and the timetable.

Delete a subject

1 Click the red bin in the subject's row.

2 Read the warning and confirm twice.

IMPORTANT A subject used in marks, exams, the timetable or homework is not deleted for those classes; it is only removed from the classes where it is unused. The message tells you how many classes kept it.

Questions

How do I assign a teacher to a subject?

Open Academics › Timetable, pick the class and add a period with that subject and teacher. The timetable is where a teacher is linked to a subject and class; the substitution page and the teacher's own timetable use it.

We have two sections of Class VI and only VI-B studies Sanskrit. Can I set that?

Yes. In Taught in, choose Selected classes / sections and tick only section B under Class VI.

Can two subjects have the same name?

No. The app stops you with "Subject '...' already exists — use ✎ on it to change its classes." Tick more classes on the existing subject instead.

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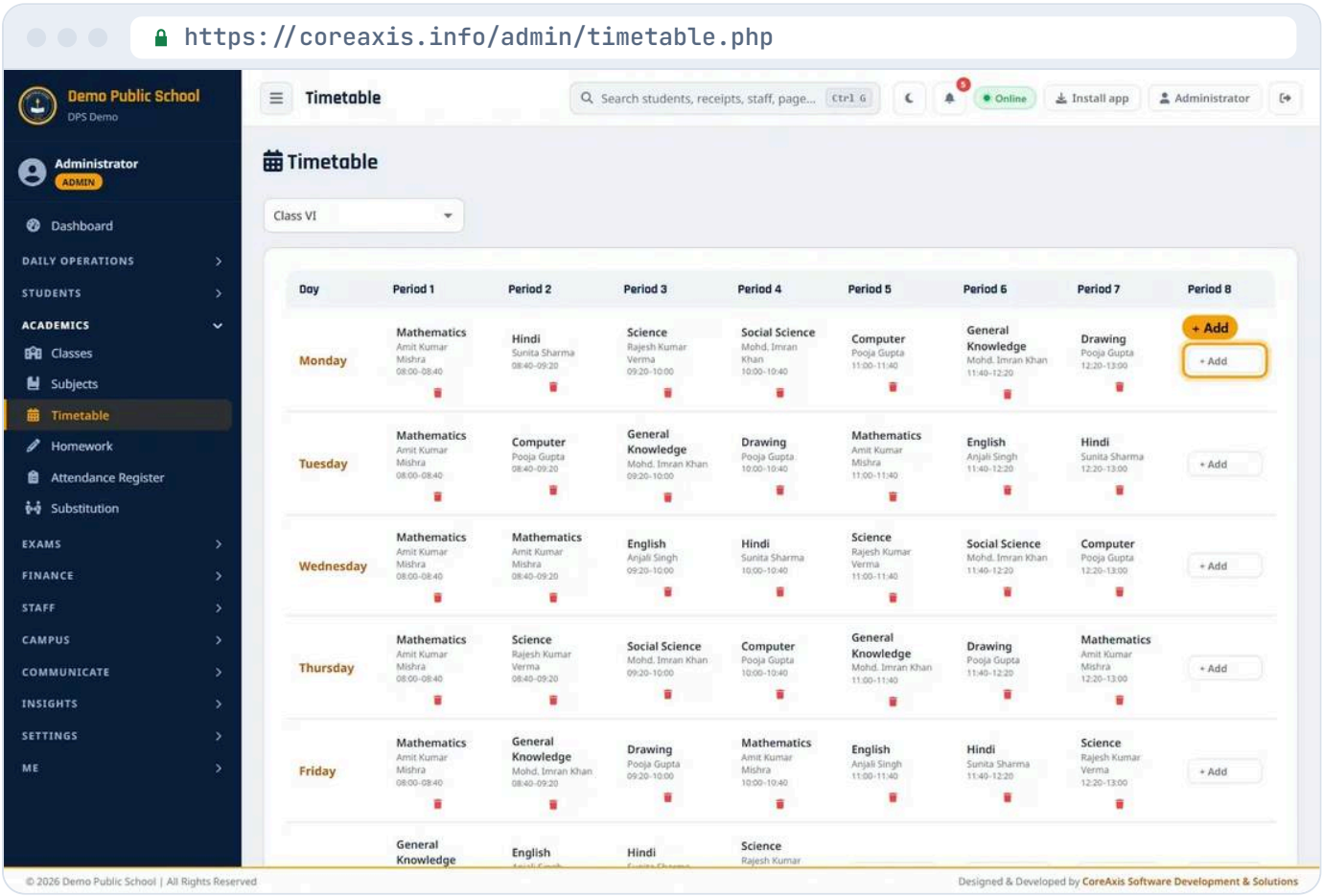
ACADEMICS · CHAPTER 13

Timetable

Admin Principal Teacher MENU Academics › Timetable (Teacher: My Class › Timetable)

The timetable is a grid of six days and eight periods for each class. Each period holds a subject, a teacher and an optional start and end time. The app stops you from putting one teacher in two classes at the same time. The timetable is used by Substitution (to find an absent teacher's periods and free teachers), by the teacher's view, and by the Timetable tab of the student and parent portal.



Timetable — Demo Public School

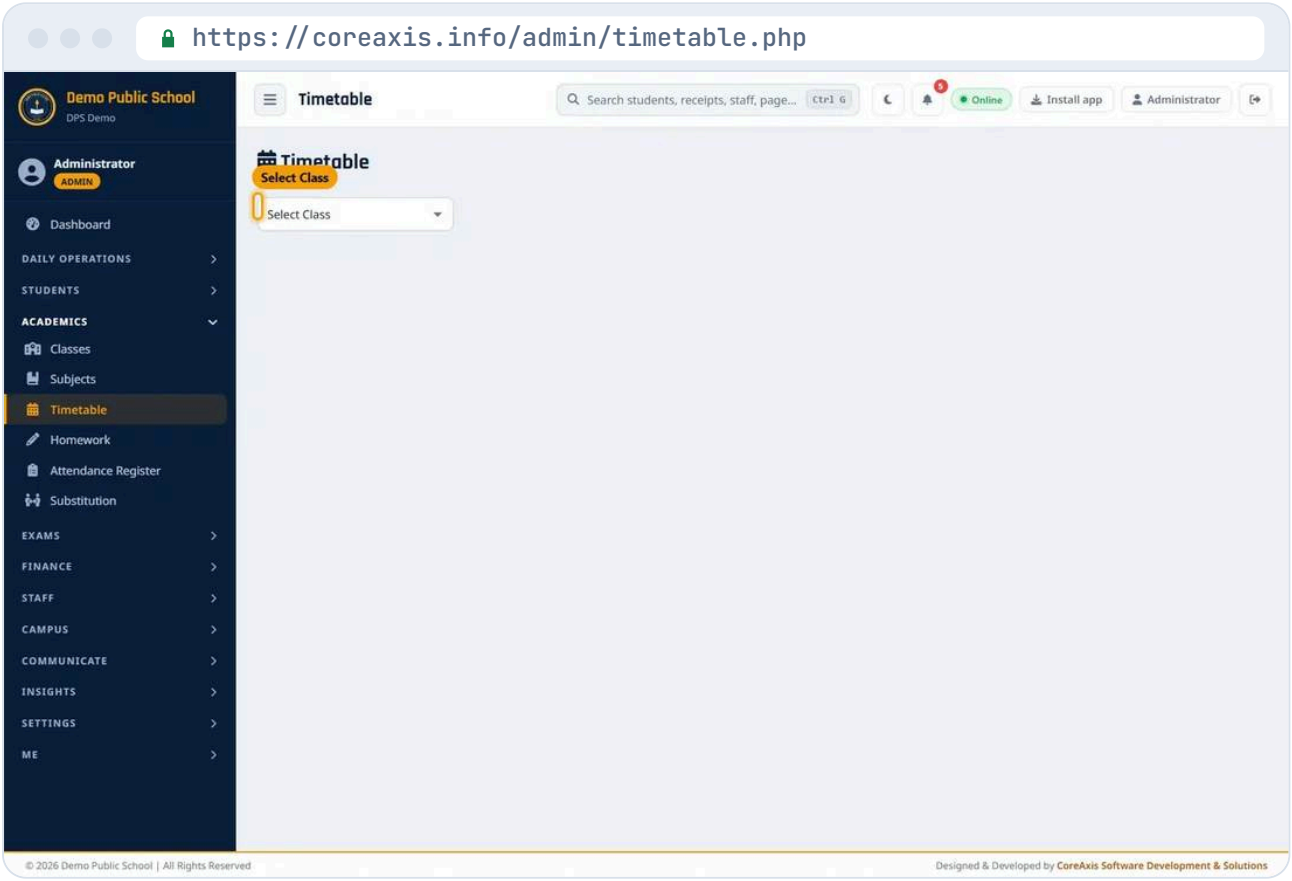
Screen at a glance

Select Class	Choose the class whose timetable you want to see or change. The grid opens as soon as you pick a class.
Day rows	Monday to Saturday.

Period 1 – Period 8	Each filled cell shows subject, teacher and time (for example Mathematics, Amit Kumar Mishra, 08:00–08:40).
+ Add	An empty period. Click to add a subject and teacher.
Click a filled period	Opens the same form to edit subject, teacher or time.
Red bin under a period	Removes that period (asks to confirm).

Add a period (example: Class VI, Monday period 8 — Sanskrit with Sunita Sharma)

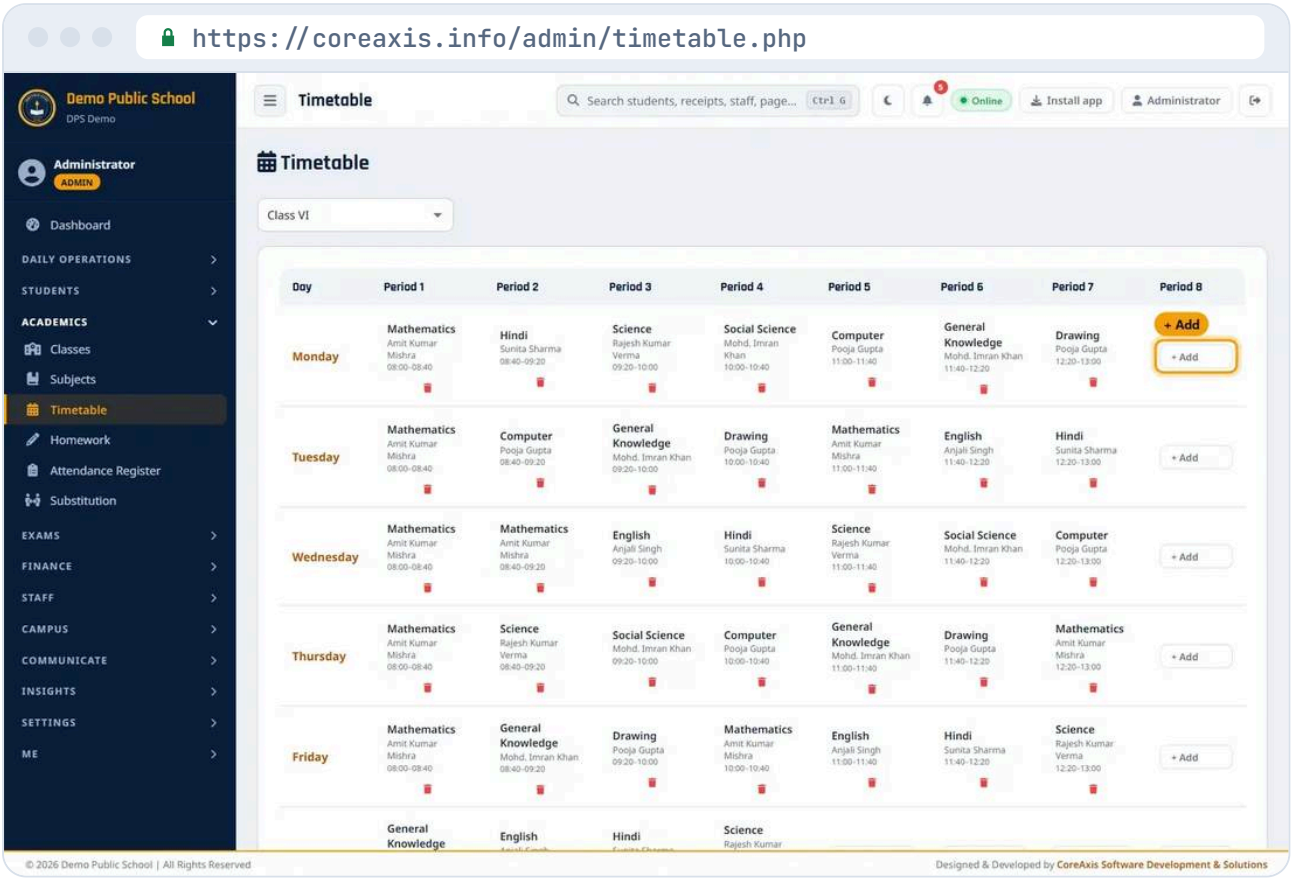
1 Open **Academics › Timetable**.



Pick a class to open its weekly grid.

2 Pick **Class VI** in **Select Class**.

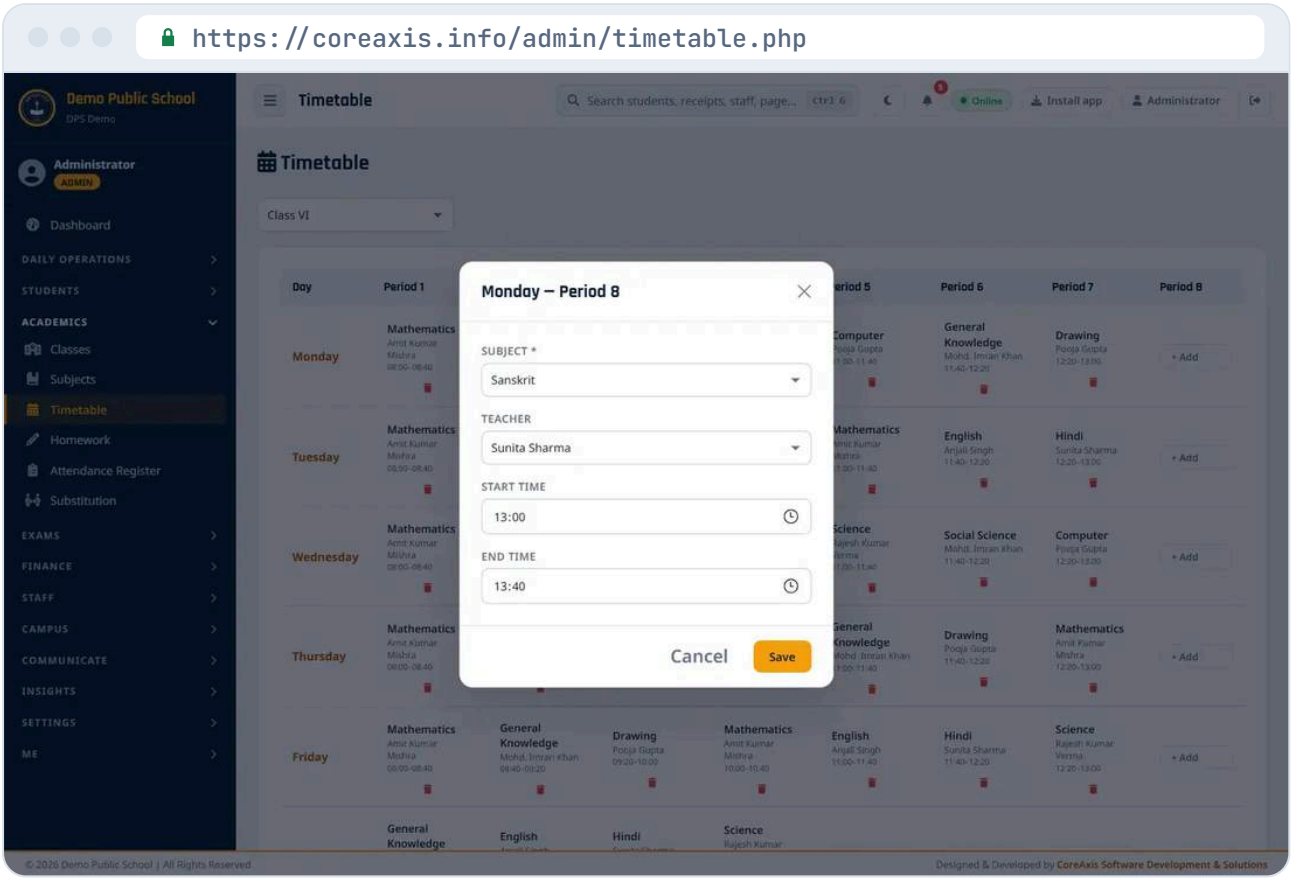
3 Find the **Monday** row and click **+ Add** under **Period 8**.



Class VI timetable; Monday period 8 is empty.

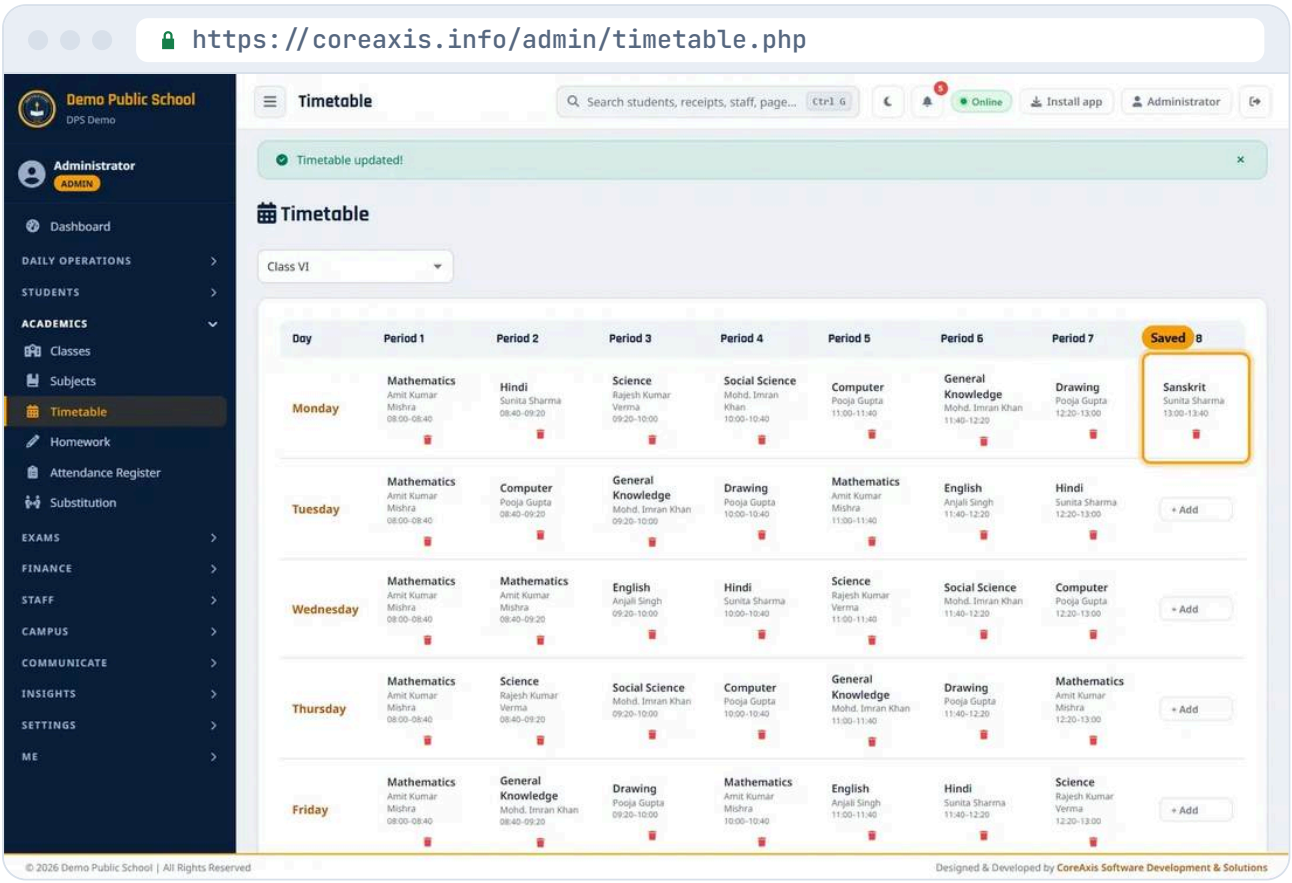
4 In the **Monday — Period 8** form, pick **Sanskrit** in **Subject** and **Sunita Sharma** in **Teacher**.

5 Set **Start Time** to **13:00** and **End Time** to **13:40**.



The period form.

6 Click **Save**, then **Save** in the confirmation popup. The message "Timetable updated!" appears and the cell shows Sanskrit, Sunita Sharma, 13:00–13:40.



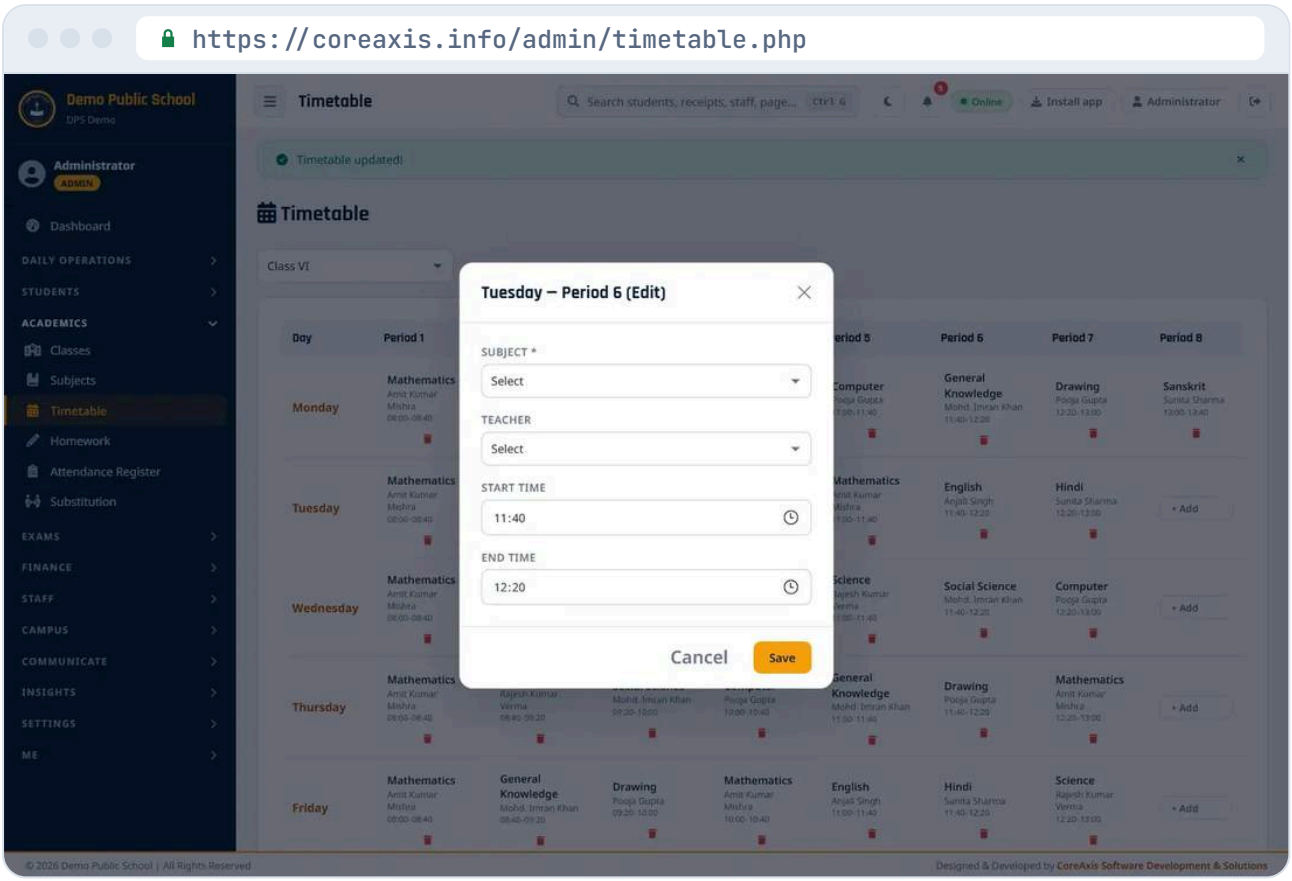
The new period in the grid.

TIP Times are in 24-hour format (13:00 = 1:00 PM). The end time must be after the start time.

TIP The subject list shows all subjects; the app refuses a subject that is not taught in the class ("That subject is not taught in this class.").

Change or remove a period

1. Click on the filled period (for example Tuesday, Period 5 — Mathematics). The form opens with the title **Tuesday — Period 5 (Edit)**.



Editing an existing period.

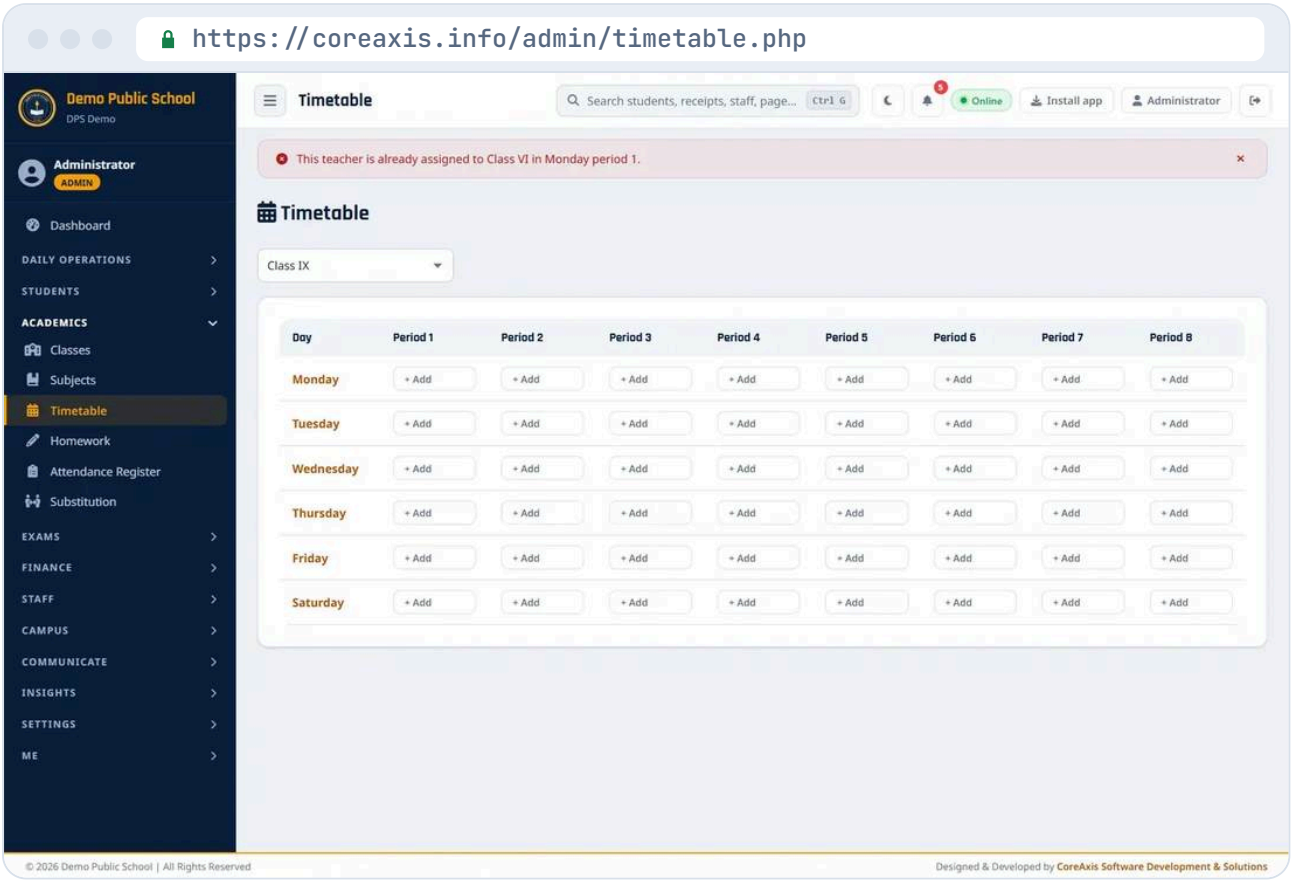
2. Change the subject, teacher or times and click **Save**, then confirm.

3. To empty a period instead, click the small red bin under it and confirm **Remove this period?**.

When a teacher is already busy (clash check)

A teacher cannot be in two classes in the same day and period. If you try, nothing is saved and a red message names the clash.

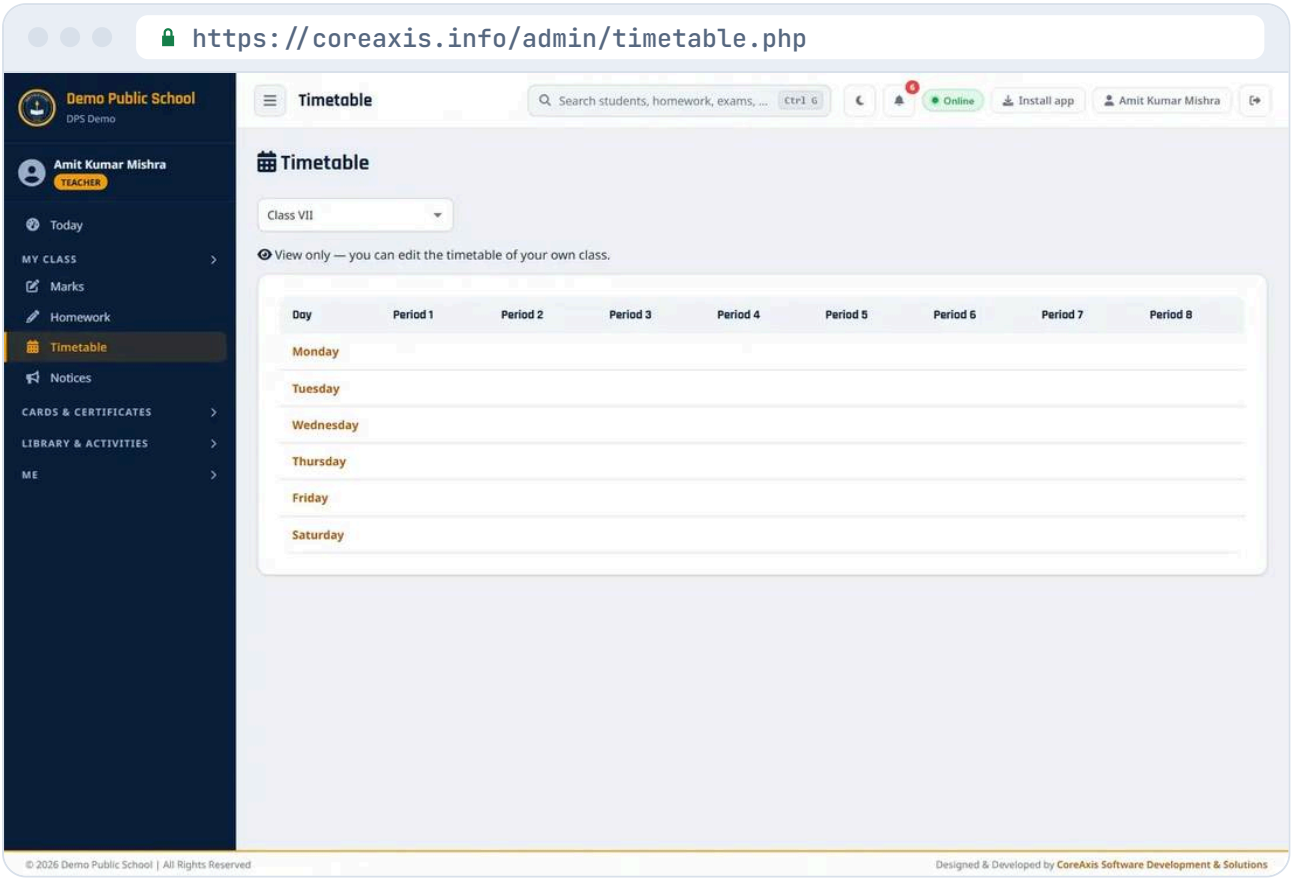
1 Example: in Class IX you add Monday period 1 — Mathematics with Amit Kumar Mishra. Amit already teaches Class VI in that period, so the app shows "This teacher is already assigned to Class VI in Monday period 1."



The clash message. Pick another teacher or another period.

What teachers see

1. Teachers open **Timetable** from **My Class** in their menu. They can add and edit periods only for the class they are class teacher of. For any other class the page shows "View only — you can edit the timetable of your own class."



Teacher Amit Kumar Mishra viewing Class VII (view only).

Questions

How do I print a class timetable?

There is no separate print button. Open the class's timetable and use your browser's Print (Ctrl + P), choosing Landscape.

Can a period be left without a teacher?

Yes. Leave Teacher as Select. The period shows the subject with a dash for the teacher. Such periods do not appear in Substitution.

Where do parents see the timetable?

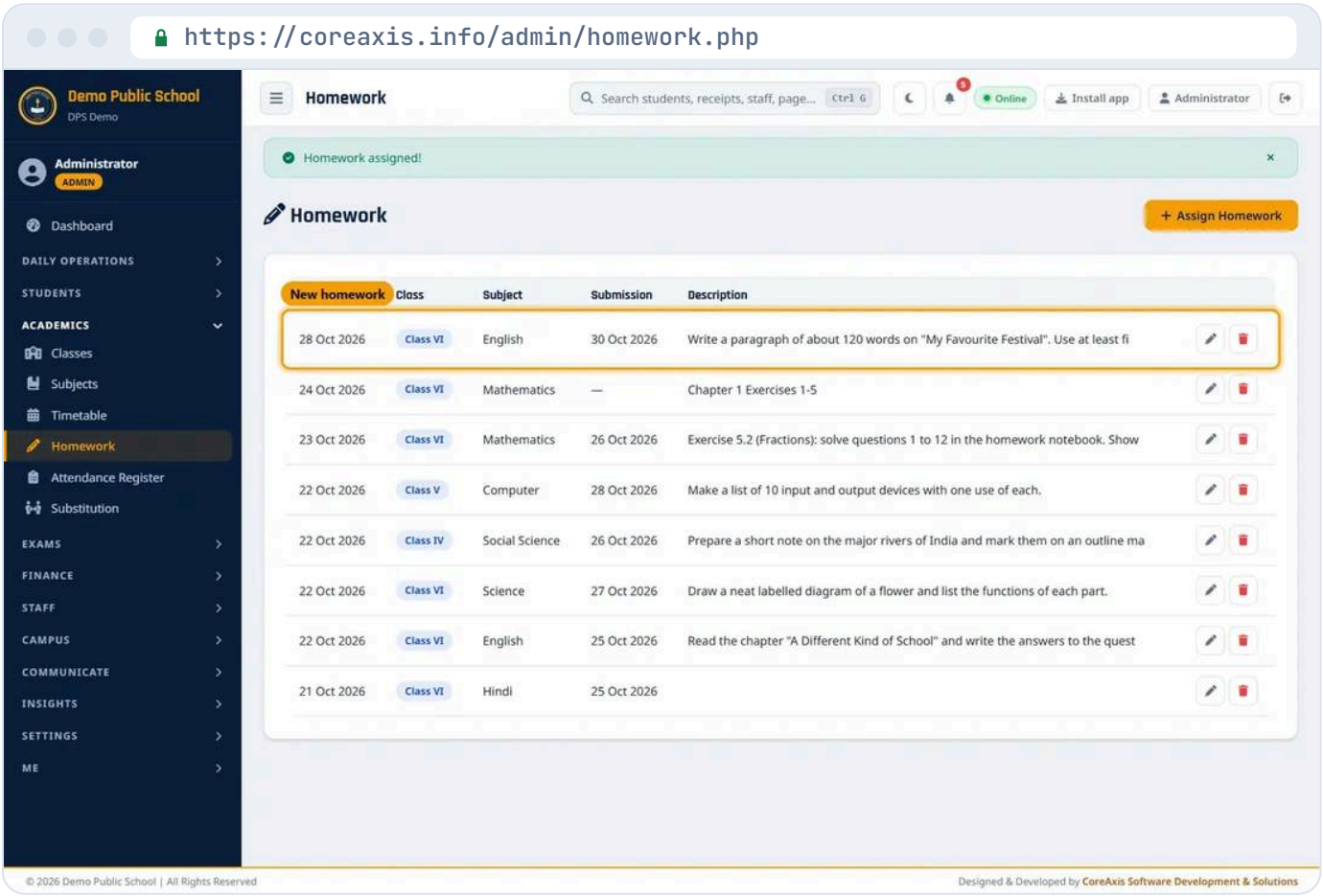
In the student and parent portal, under Timetable.

ACADEMICS · CHAPTER 14

Homework

Admin Principal Teacher MENU Academics › Homework (Teacher: My Class › Homework)

Homework is set for a whole class and one subject, with the date it is given, an optional submission date and a written description. As soon as it is saved it appears under Homework in the student and parent portal and the mobile app. Admin and Principal see the homework of all classes; a teacher sees and sets homework only for the classes they are class teacher of.



Homework — Demo Public School

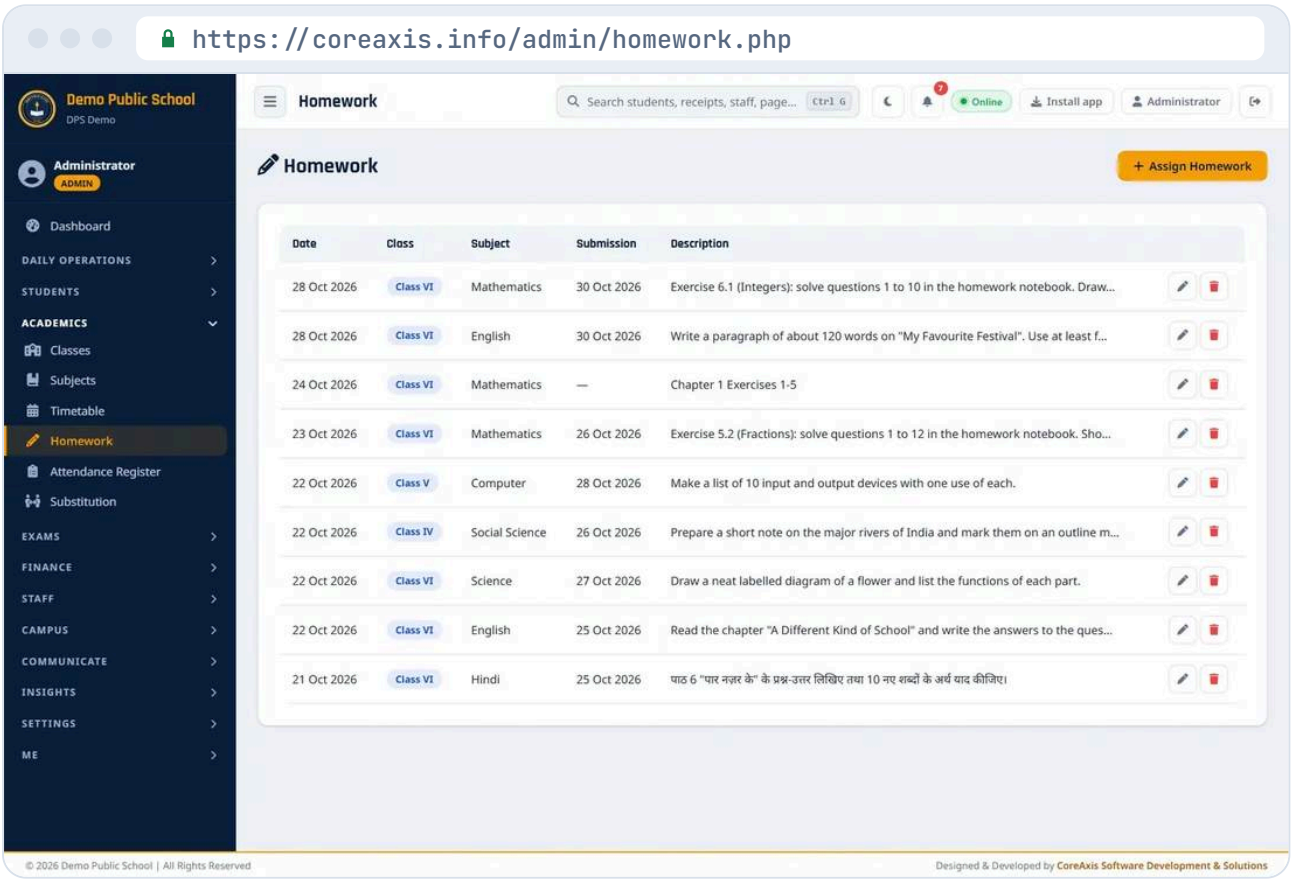
Screen at a glance

Assign Homework	Opens the form for new homework.
Date	The day the homework was given. The newest is at the top; 50 items per page.

Class / Subject	Who the homework is for and in which subject.
Submission	The date it must be handed in, or a dash if none was set.
Description	The first 80 characters of the homework text, in any language (Hindi homework shows in Devanagari).
Pencil / Bin	Edit the homework, or delete it (asks to confirm).

Give homework to a class (example: Class VI English, due 30 Oct 2026)

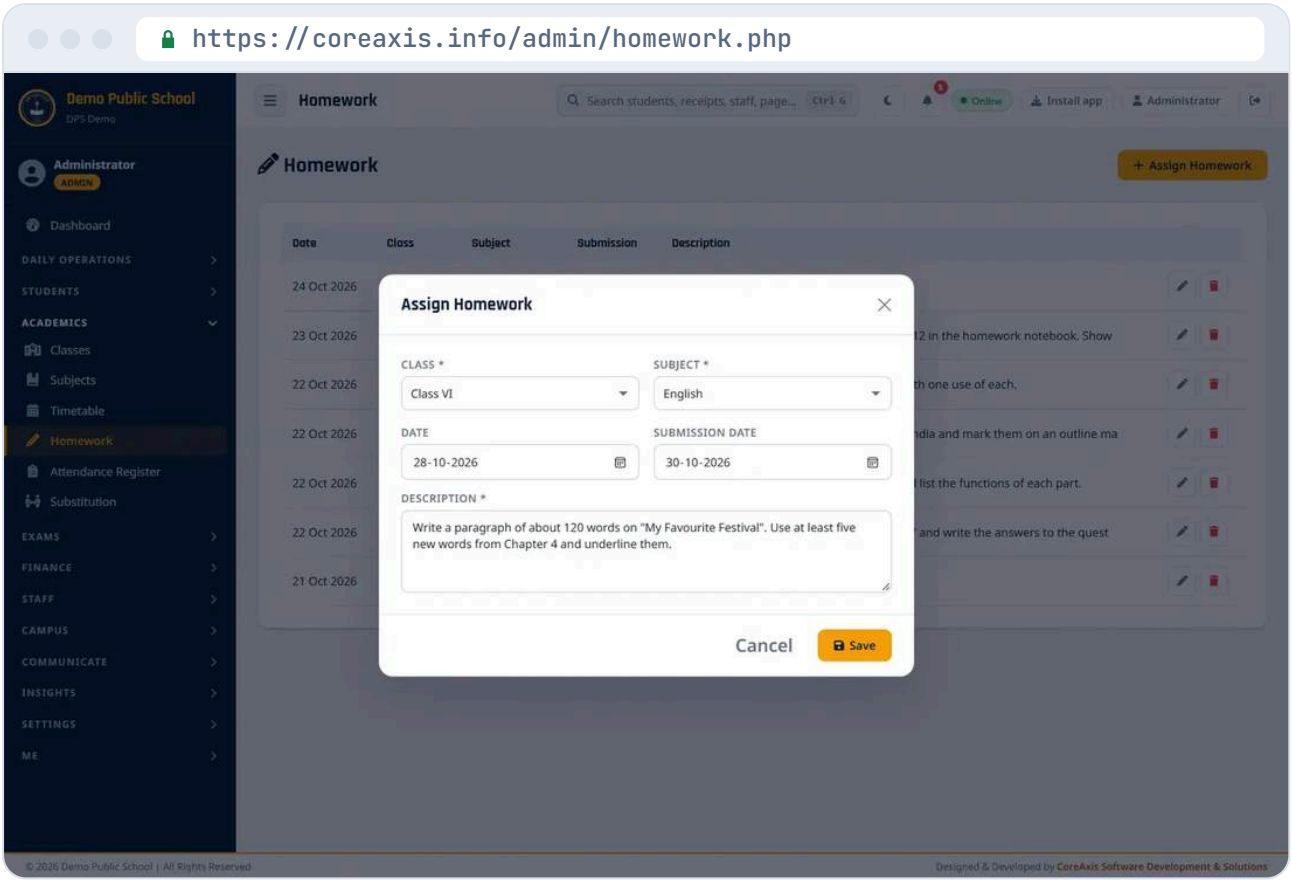
1. Open **Academics › Homework** and click **Assign Homework**.



The homework list with the Assign Homework button.

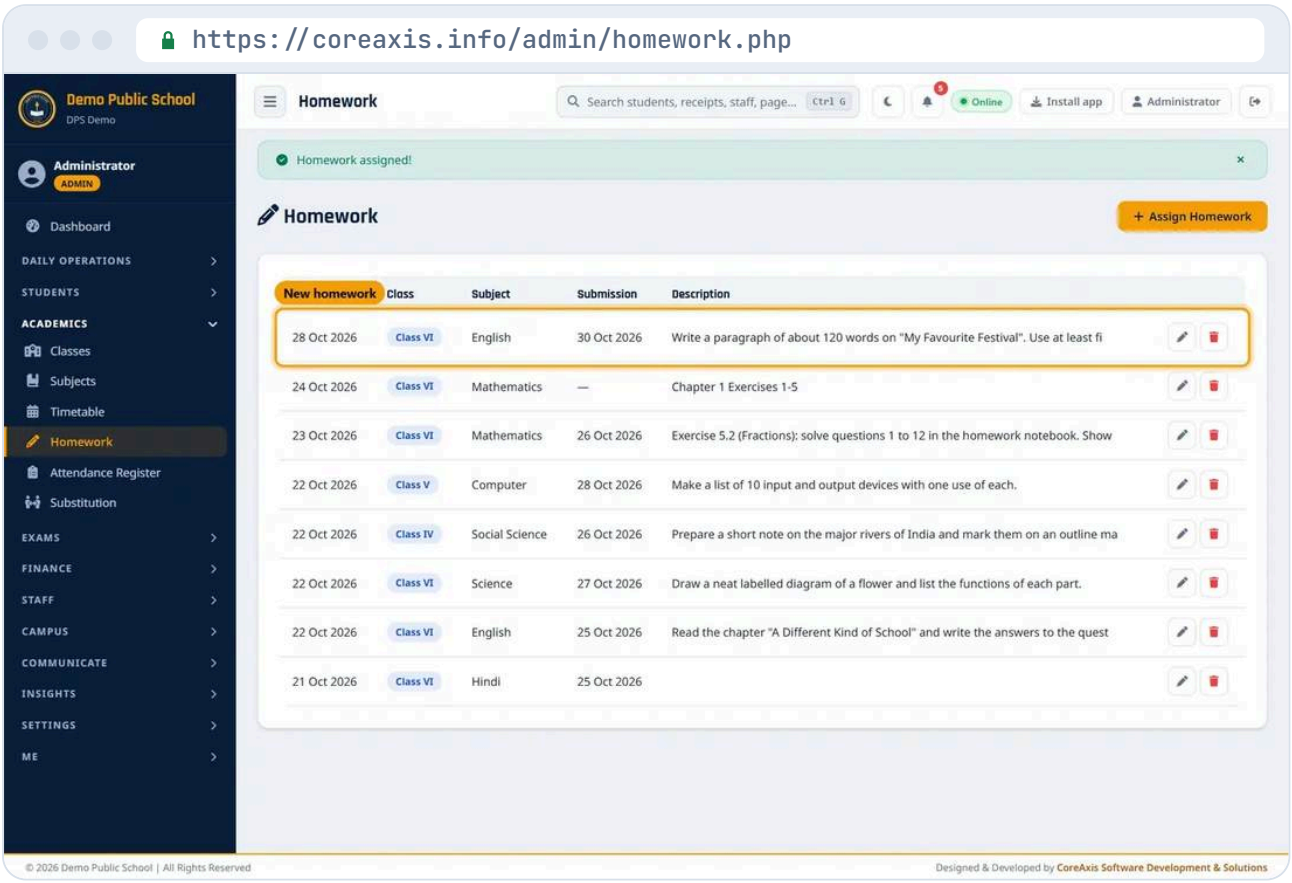
2. Pick **Class VI** in **Class** and **English** in **Subject**.
3. Leave **Date** as today (**28-10-2026**) and set **Submission Date** to **30-10-2026**.

4 Type the homework in **Description**, for example: Write a paragraph of about 120 words on "My Favourite Festival". Use at least five new words from Chapter 4 and underline them.



The Assign Homework form filled in.

5 Click **Save**, then **Save** in the confirmation popup. The message "Homework assigned!" appears and the homework is at the top of the list.



The new homework in the list.

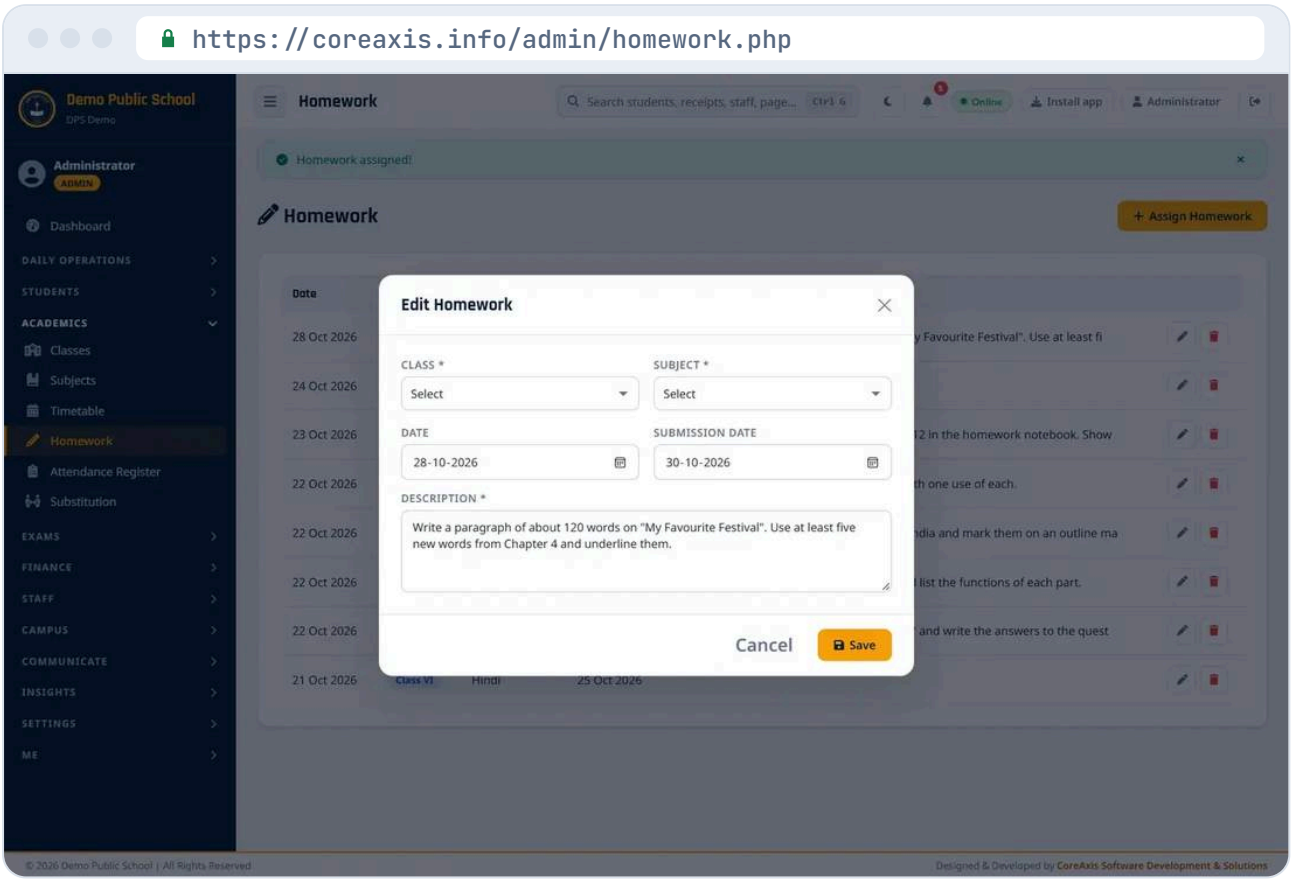
TIP The submission date cannot be before the homework date.

TIP Homework is for the whole class. To give different work to one student, write it in a note to the parent instead.

TIP Homework can be written in Hindi or English. The list shows the start of the text in the language it was typed.

Edit or delete homework

1. Click the pencil in the homework's row. The **Edit Homework** form opens with the saved details.



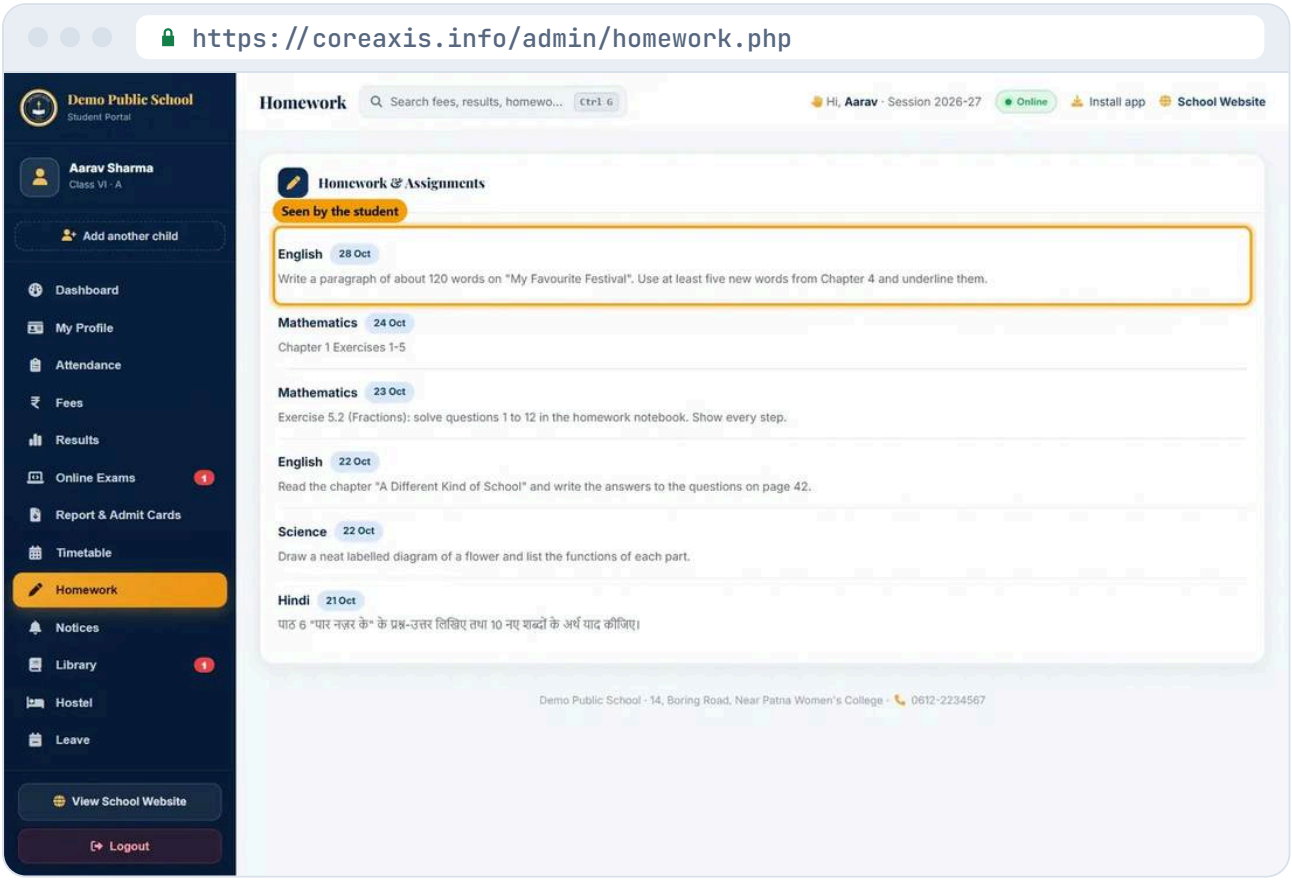
Edit Homework.

2. Change what you need and click **Save**, then confirm. The message "Homework updated!" appears.

3. To remove homework given by mistake, click the red bin and confirm **Delete this homework?** twice.

What students and parents see

1. In the portal, **Homework** lists the last 10 homework items of the student's class, newest first, with the subject, the date given and the full text. Aarav Sharma of Class VI-A sees the English homework at the top.



Student portal › Homework.

TIP The portal shows the date the homework was given, not the submission date. If the due date matters, also write it in the description (for example "Submit by Friday, 30 Oct").

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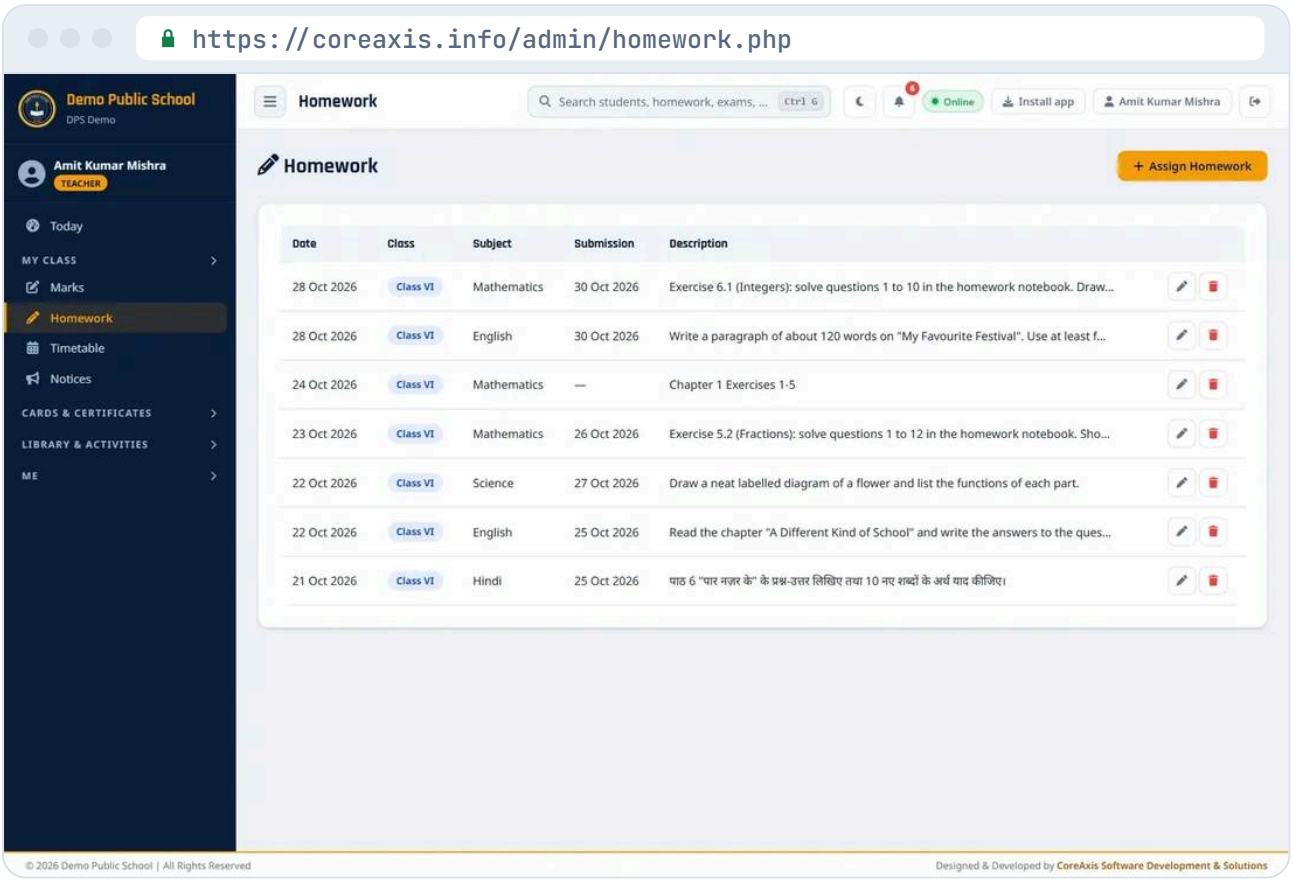
Teacher's view

1. A teacher opens **Homework** from **My Class**. The class list in the form shows only their own class, and the list shows only that class's homework.



Amit Kumar Mishra (class teacher of VI-A) sees only Class VI homework.

Questions

Can I attach a worksheet (PDF or photo) to homework?

Not at present. Homework is text only. Share the worksheet through Notices or the class's usual channel, and mention it in the homework text.

Does the parent get an SMS for new homework?

No SMS is sent from this page. Parents see it in the portal and the mobile app.

I see old homework only on page 2. Is it lost?

No. The list shows 50 items per page; use the page links under the table.

Can I write homework in Hindi?

Yes. Type it in Hindi (Devanagari) in Description. The list, the portal and the app show it as typed, for example the Class VI Hindi homework of 21 Oct: पाठ 6 "पार नज़र के" के प्रश्न-उत्तर लिखिए तथा 10 नए शब्दों के अर्थ याद कीजिए।

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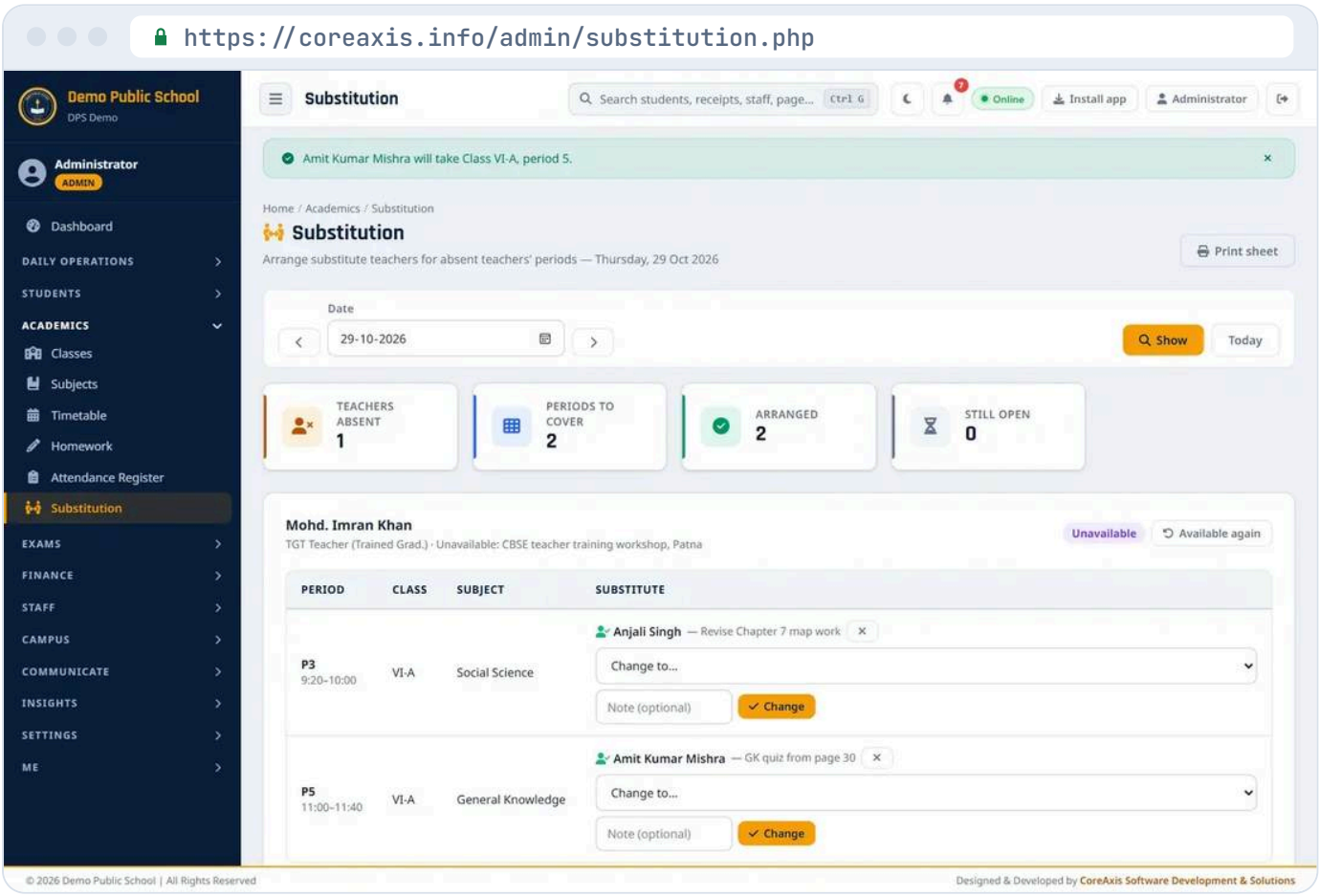
ACADEMICS · CHAPTER 15

Substitution

Admin Principal MENU Academics › Substitution

Substitution (arrangement) shows, for one date, every teacher who is away and each of their timetable periods that needs cover. A teacher appears here when they are on approved leave, marked absent in Staff Attendance, or marked unavailable on this page. For each period the app lists only teachers who are free in that period, with the best choice first. The arranged periods appear in each substitute's My Substitutions page and on a printable sheet for the staff room.



Substitution — Demo Public School

Screen at a glance

Print sheet	Opens the day's arrangement sheet in a new tab, ready to print.

Date, ‹ › and Show	Pick the date (or step one day back / forward) and click Show. Today returns to the current date.
Teachers absent	Teachers away on the date.
Periods to cover	Their timetable periods on that weekday.
Arranged	Periods that already have a substitute.
Still open	Periods still without a substitute (red when above zero).
Teacher card	One card per absent teacher with the reason and a badge: On leave, Absent or Unavailable. Available again removes a manual Unavailable mark.
Period / Class / Subject / Substitute	Each period to cover, with a list of free teachers, an optional Note and an Assign button. After assigning, the substitute's name is shown with an × to remove it and a Change to… list.
Mark a teacher unavailable	For a teacher who is away without a leave application or attendance mark (on duty elsewhere, training, came late). Their periods then appear above.

Mark a teacher unavailable for a day (example: Mohd. Imran Khan, 29 Oct 2026)

Mohd. Imran Khan is attending a CBSE training workshop on Thursday, 29 October.
He has not applied for leave, so the office marks him unavailable.

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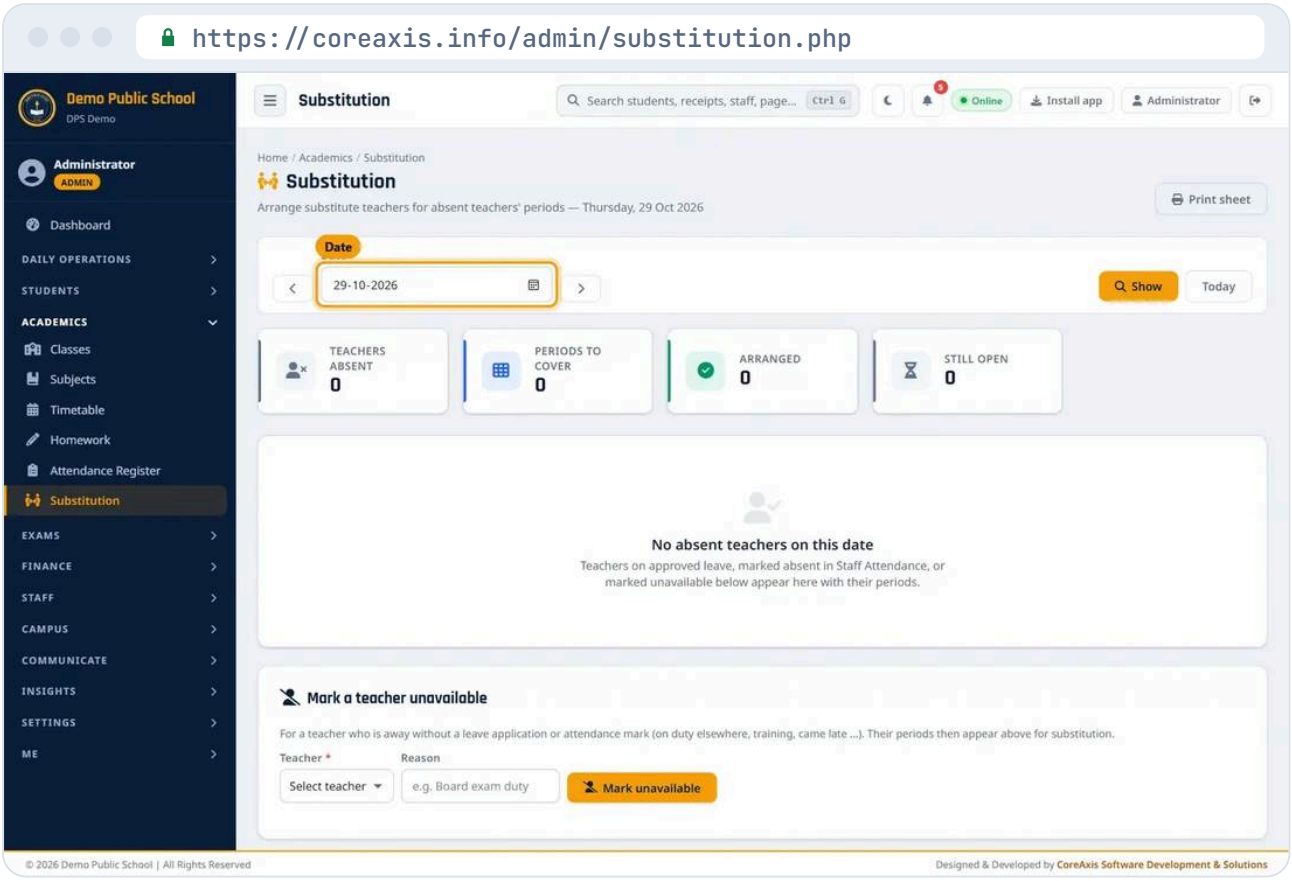
1 Open **Academics › Substitution**.

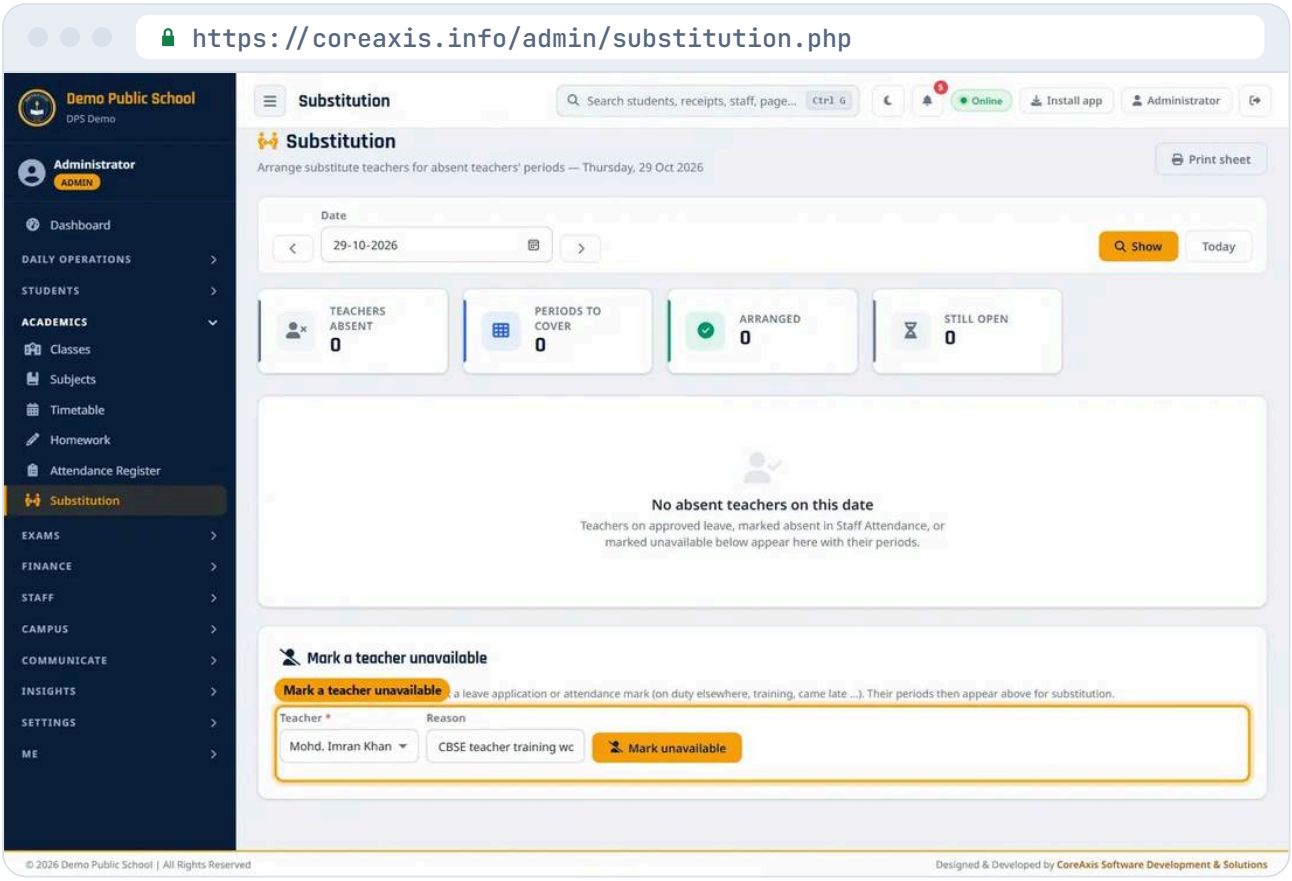


The Substitution page for a date with no absent teacher.

2 Set **Date** to **29-10-2026** and click **Show**.

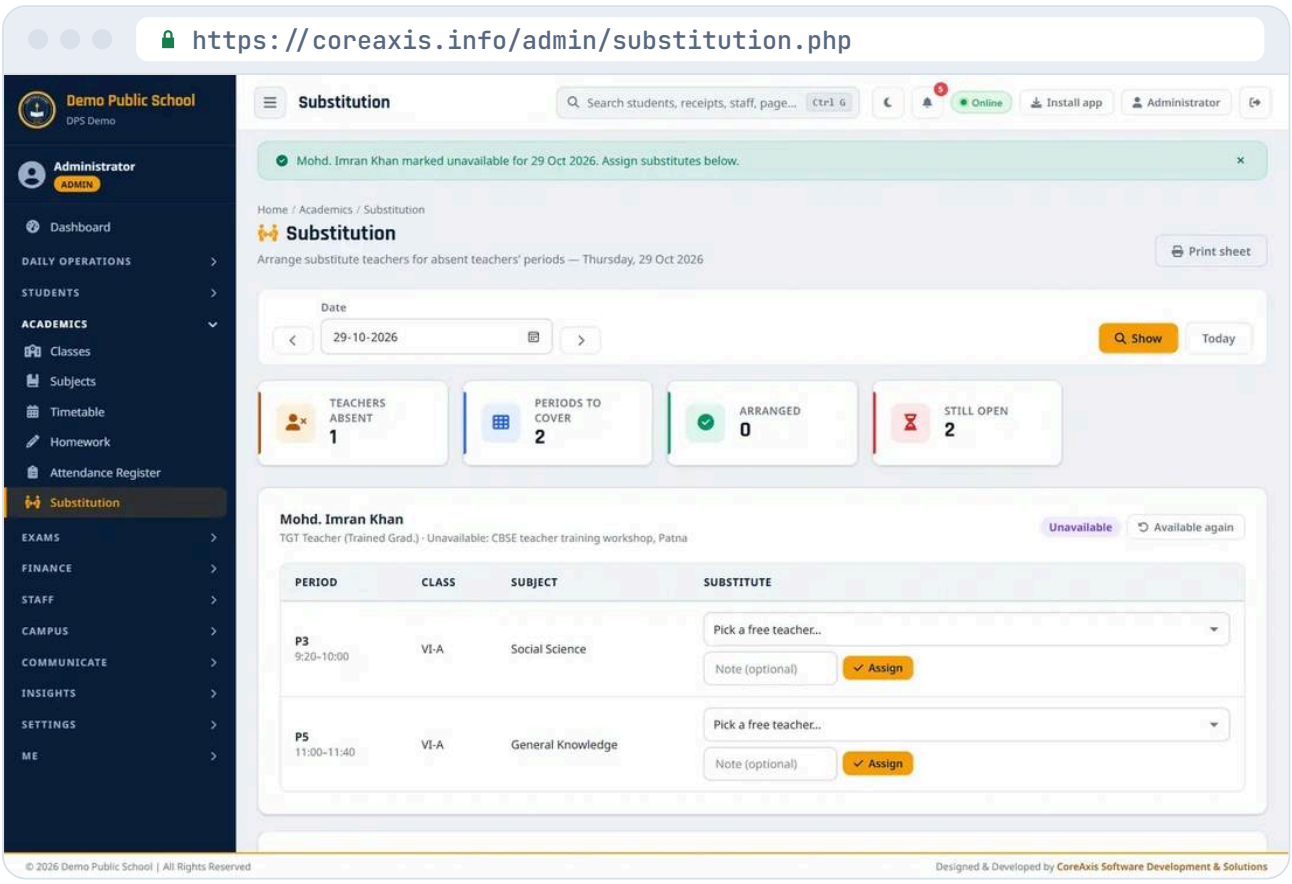
3 Under **Mark a teacher unavailable**, pick **Mohd. Imran Khan** in **Teacher**.

4 Type the reason in **Reason**: CBSE teacher training workshop, Patna.



Marking a teacher unavailable.

5 Click **Mark unavailable**, then confirm. The message "Mohd. Imran Khan marked unavailable for 29 Oct 2026. Assign substitutes below." appears and his card lists his Thursday periods (P3 Social Science and P5 General Knowledge in VI-A).



His periods now need cover: 2 still open.

TIP Teachers with approved leave or marked absent in Staff Attendance appear here on their own. You do not need to mark them unavailable.

TIP If a teacher has no periods on that weekday, the card says "No timetable periods on Thursday — nothing to arrange."

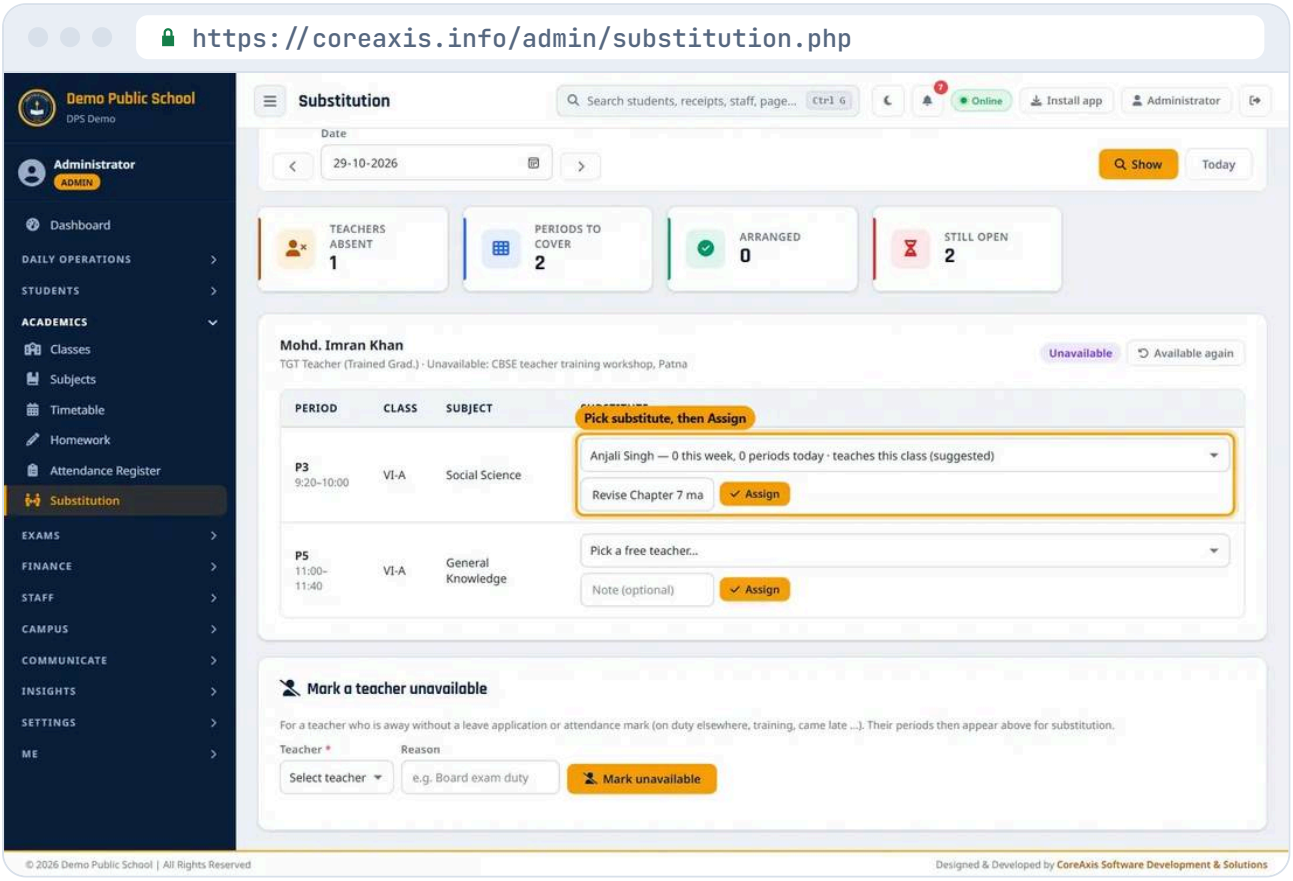
TIP If the date is a holiday or Sunday, the page says the school is off and nothing needs arranging.

Assign substitutes (example: P3 to Anjali Singh, P5 to Amit Kumar Mishra)

1 In the row for **P3 · VI-A · Social Science**, open the list **Pick a free teacher...**. Each name shows how many substitutions the teacher already has this week and how many periods they teach that day. "teaches this class" means they know the students. The first name is marked (suggested).

2. Pick **Anjali Singh — 0 this week, 0 periods today · teaches this class (suggested)**.

3. Type a short instruction in **Note (optional)**, for example Revise Chapter 7 map work.

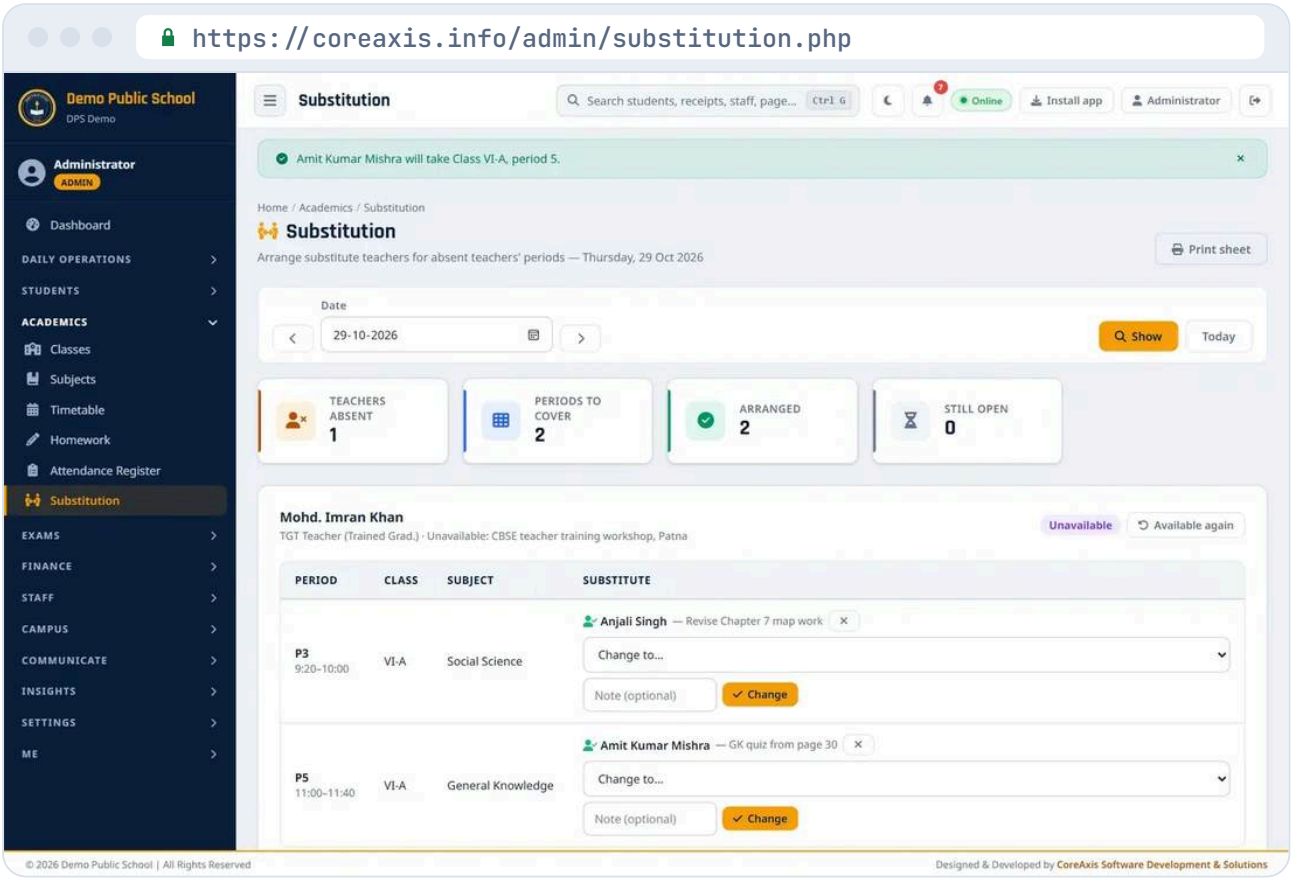


Pick a substitute and add a note.

4. Click **Assign** and confirm. The message "Anjali Singh will take Class VI-A, period 3." appears.

5. Do the same for **P5 · General Knowledge**: pick **Amit Kumar Mishra**, note GK quiz from page 30, and click **Assign**.

6 Check the counters: **Arranged 2** and **Still open 0**.



Both periods are covered.

TIP Only teachers who are free in that period and not away themselves are listed. If nobody is free, the row says "No free teacher in this period."

TIP To swap a substitute, pick another name in **Change to...** and click **Change**. To cancel an arrangement, click the × next to the name and confirm.

TIP If the absent teacher comes back, click **Available again** on their card. Arrangements already saved stay until you remove them.

Print the arrangement sheet

1 With the date selected, click **Print sheet** (top right). The sheet opens in a new tab.

2 Check the sheet: period, time, class, subject, absent teacher (with reason), substitute (with note) and a signature column. The footer shows how many periods are arranged and when it was printed.

Daily Arrangement (Substitution) sheet for 29 October 2026.

3 Click **Print**. Pin the sheet in the staff room and ask substitutes to sign against their period.

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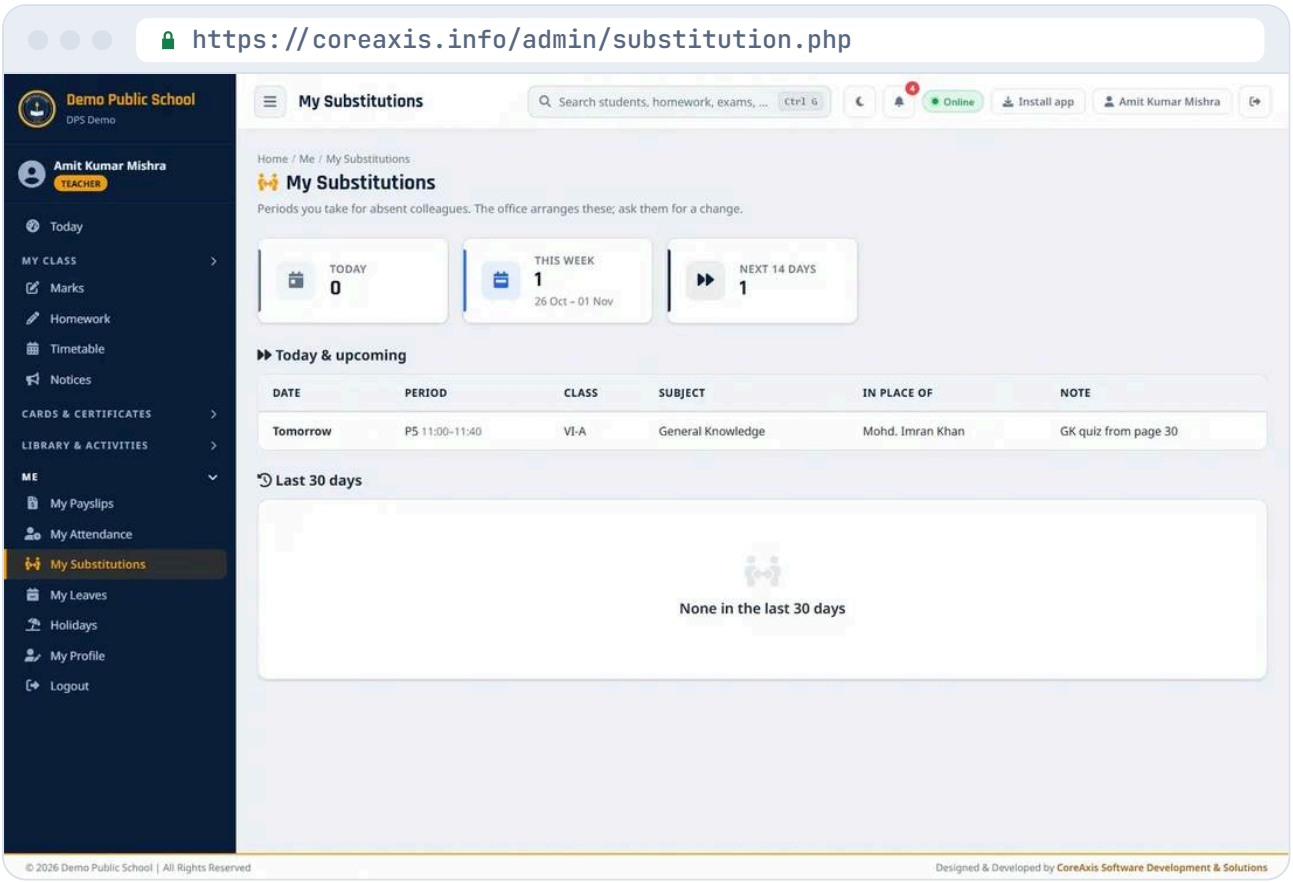
What the substitute teacher sees

1. Every staff member has **Me › My Substitutions**. It shows counters for Today, This week and Next 14 days, a table of upcoming periods (date, period, class, subject, in place of, note) and the last 30 days. Amit Kumar Mishra sees his period for tomorrow.



Teacher view: My Substitutions.

TIP Teachers cannot change arrangements themselves; the page tells them to ask the office.

Questions

A teacher is on approved leave but does not appear. Why?

Check the date you are viewing and that the leave is approved (not pending). Also check that the teacher has periods in the timetable on that weekday.

Can I arrange substitutes for tomorrow in advance?

Yes. Use the › arrow or pick tomorrow's date and click Show.

Why is a teacher missing from the substitute list?

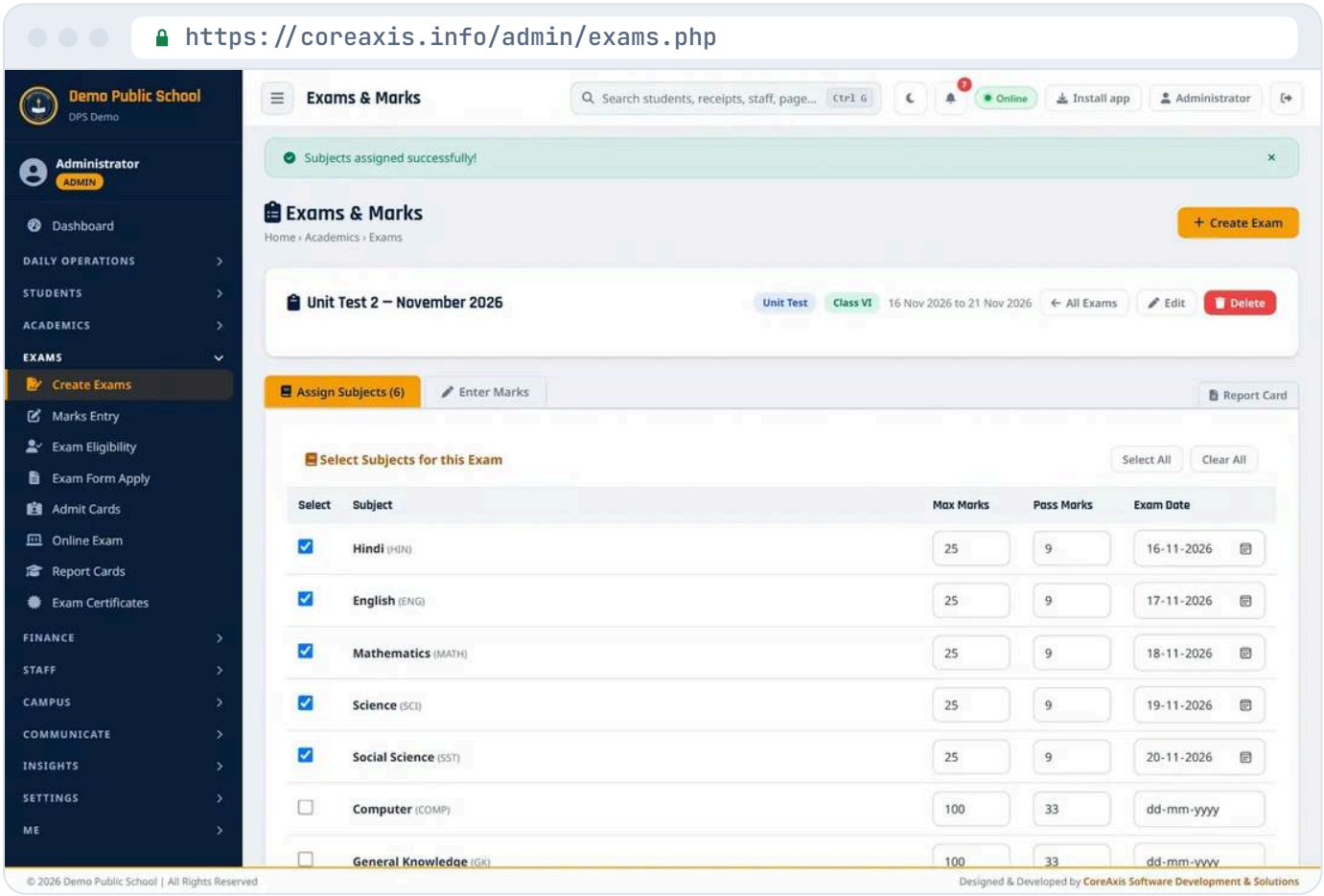
They already have a period at that time, or they are away themselves on that date.

EXAMS · CHAPTER 16

Create Exams

Admin | Principal | Teacher (own class) MENU Exams › Create Exams

Every test the school holds — unit test, half-yearly, annual or pre-board — starts here. You create the exam, choose which subjects it covers with their maximum marks, pass marks and dates, then enter marks (see Marks Entry). The subject list feeds admit cards and report cards. Results stay hidden from students and parents until the Principal or an Admin clicks Publish.



Create Exams — Demo Public School

Screen at a glance

Create Exam	Opens the form for a new exam.
All Exams — 2026-27	The exams of the current session, newest first.

Exam Name / Type / Class / Dates	Name, type (Unit Test, Half Yearly, Annual / Yearly, Pre-Board), the class (or All) and the date range.
Results	Published (students and parents can see the marks) or Not published. Admin and Principal see a Publish / Hide button next to it.
Subjects	Opens the exam on the Assign Subjects tab.
Marks	Opens the exam on the Enter Marks tab.
Report card icon	Opens Report Cards with this exam's class and exam already chosen.
Exam header (inside an exam)	Type and class badges, dates, All Exams, Edit (change name, type, class or dates) and Delete (removes the exam and all its marks). Delete is shown to Admin and Principal only. For an All Classes exam, Edit is also Admin and Principal only.

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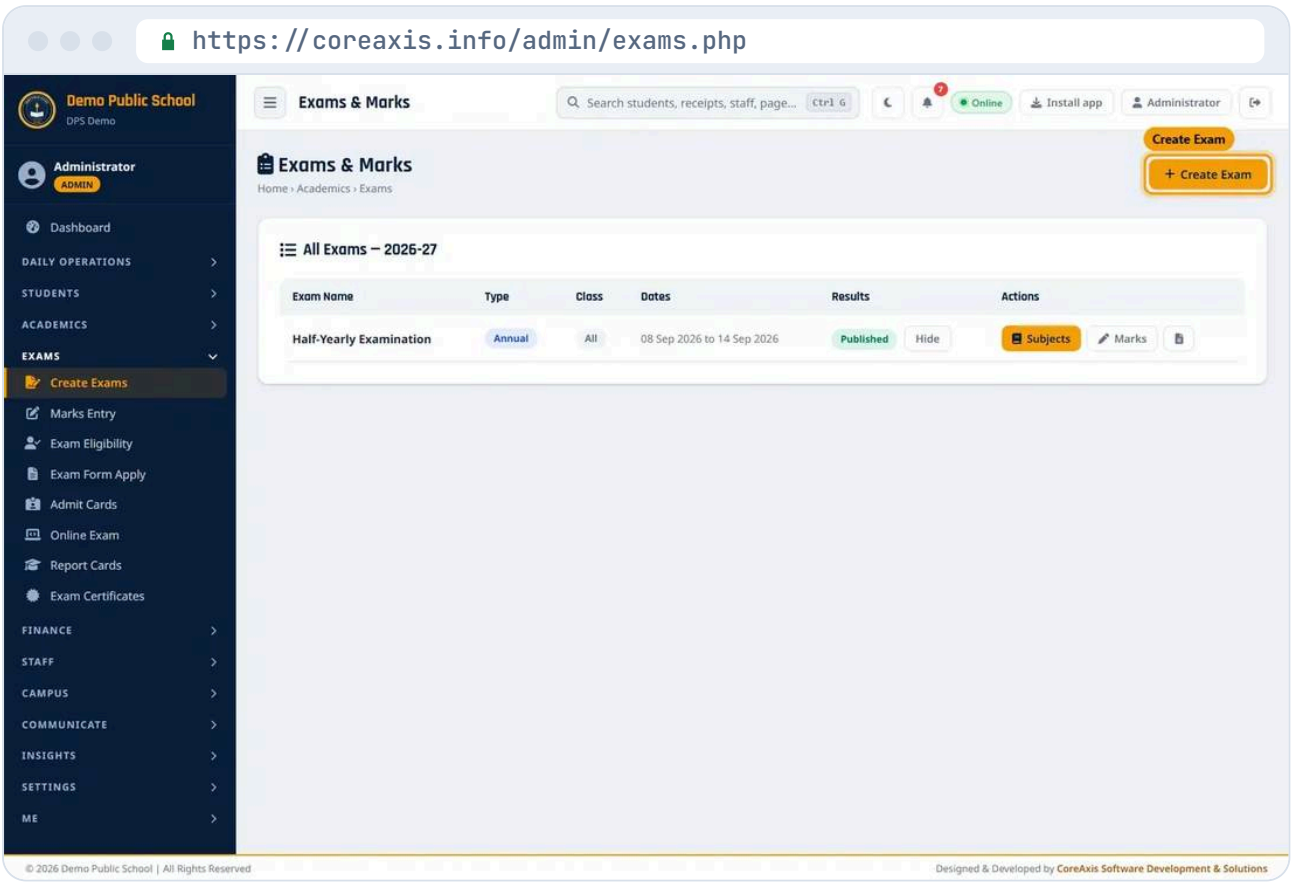
Create an exam (example: Unit Test 2 — November 2026 for Class VI)

1 Open **Exams › Create Exams** and click **Create Exam**.

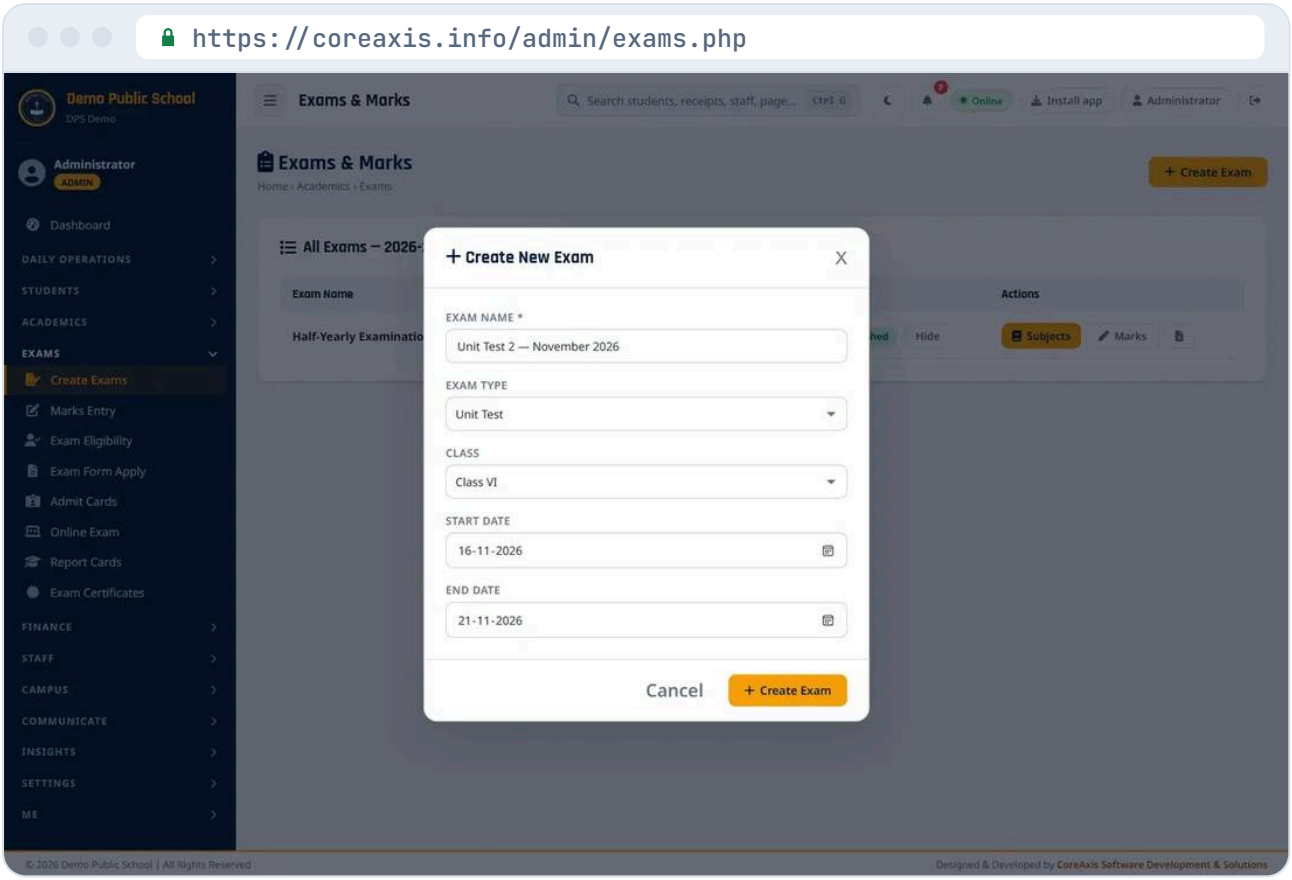


The exam list with the Create Exam button.

2 Type **Unit Test 2 — November 2026** in **Exam Name**.

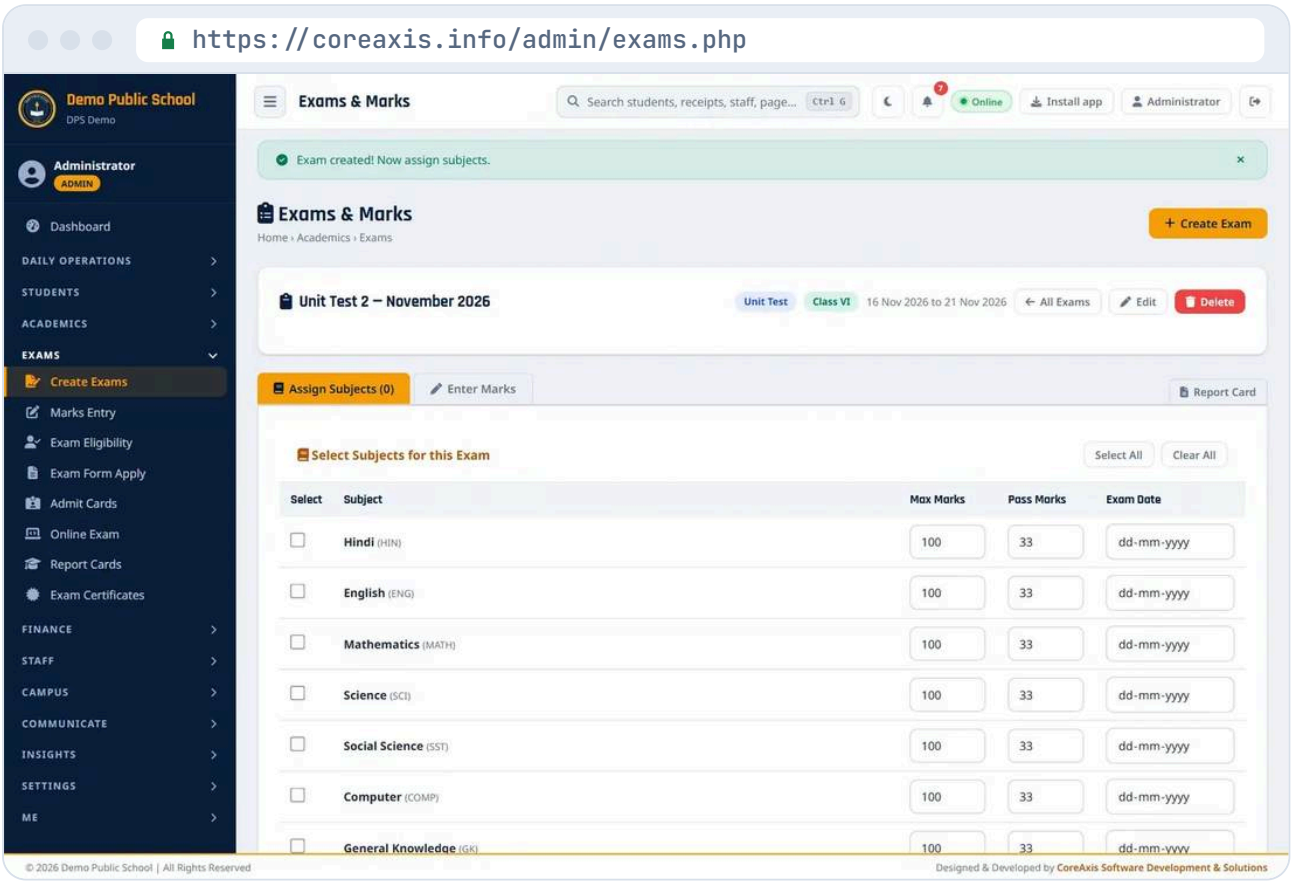
3 Pick **Unit Test** in **Exam Type** and **Class VI** in **Class**.

4 Set **Start Date** to **16-11-2026** and **End Date** to **21-11-2026**.



The Create New Exam form.

5 Click **Create Exam** and confirm. The message "Exam created! Now assign subjects." appears and the exam opens on the **Assign Subjects** tab.



A new exam: no subjects ticked yet.

TIP Choose **All Classes** for a school-wide exam such as the Half-Yearly or Annual exam: you set the subjects and dates once, and marks are entered class by class (the Enter Marks tab has a Class box). Choose one class for a class test or a test with its own subjects.

TIP Teachers can create exams only for their own class. All Classes is for Admin and Principal; teachers still see All Classes exams and enter marks for their own class.

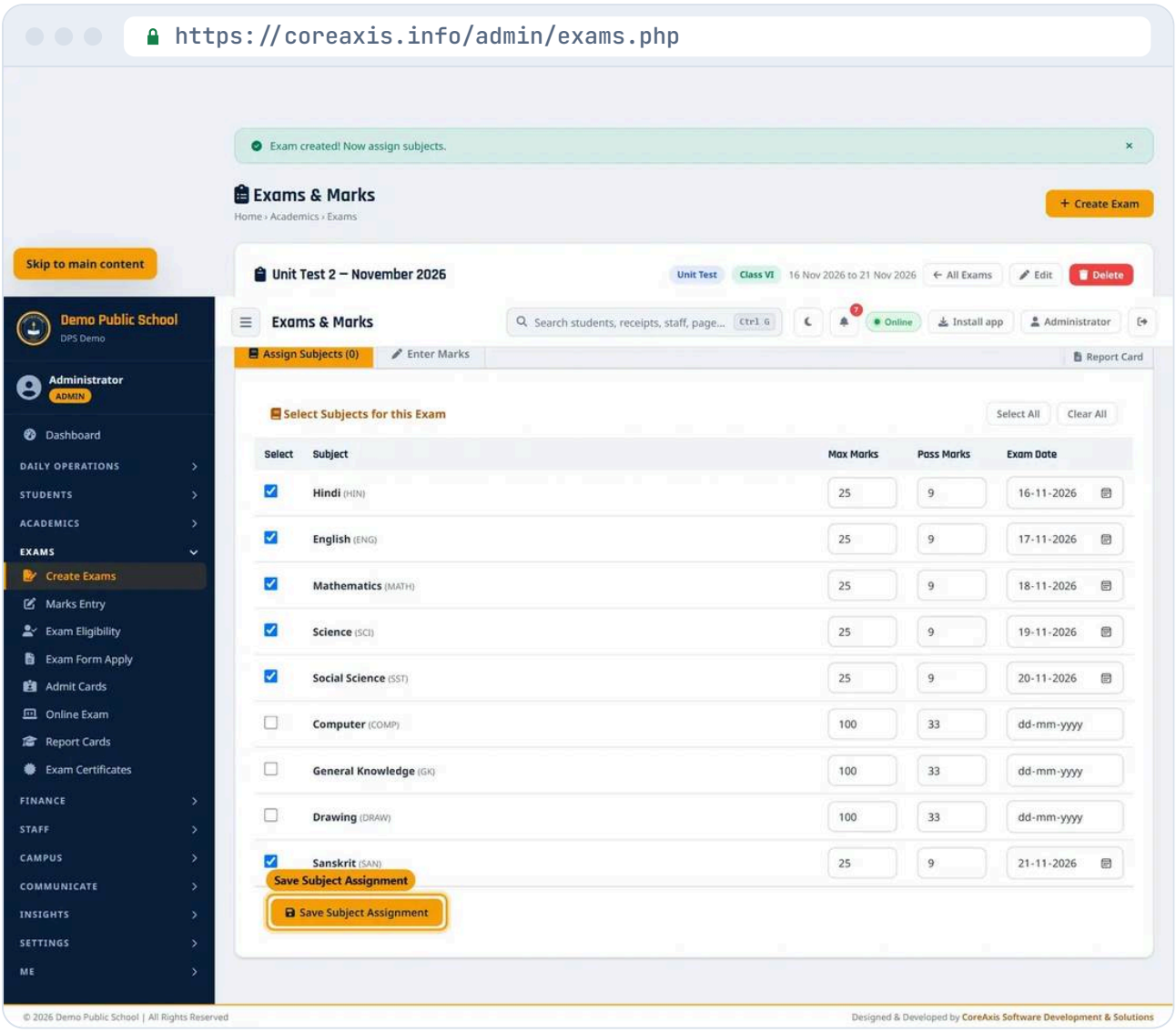
Choose the subjects, marks and dates

Unit Test 2 covers six subjects, 25 marks each, pass mark 9, one subject a day.

1 Tick **Select** for Hindi, English, Mathematics, Science, Social Science and Sanskrit. Leave Computer, General Knowledge and Drawing unticked. **Select All** and **Clear All** tick or untick every row.

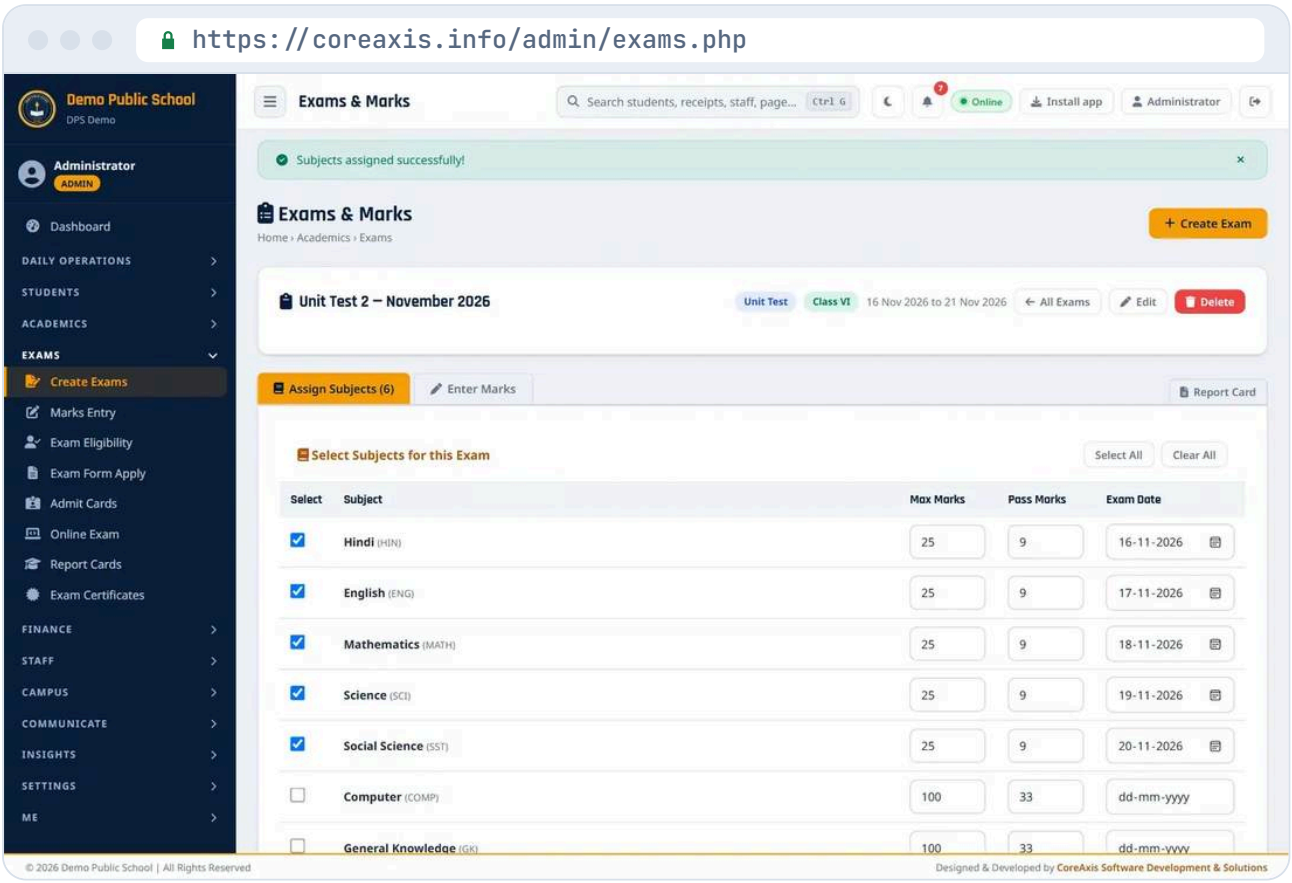
2 In each ticked row, set **Max Marks** to **25** and **Pass Marks** to **9**.

3 Set each **Exam Date**: Hindi 16-11-2026, English 17-11-2026, Mathematics 18-11-2026, Science 19-11-2026, Social Science 20-11-2026, Sanskrit 21-11-2026.



Six subjects ticked with 25 / 9 marks and dates.

4 Click **Save Subject Assignment** and confirm. The message "Subjects assigned successfully!" appears and the tab reads **Assign Subjects (6)**.



Saved: the exam now has 6 subjects.

TIP The subject dates and marks print on the admit card schedule. Pass marks decide pass / fail on the report card.

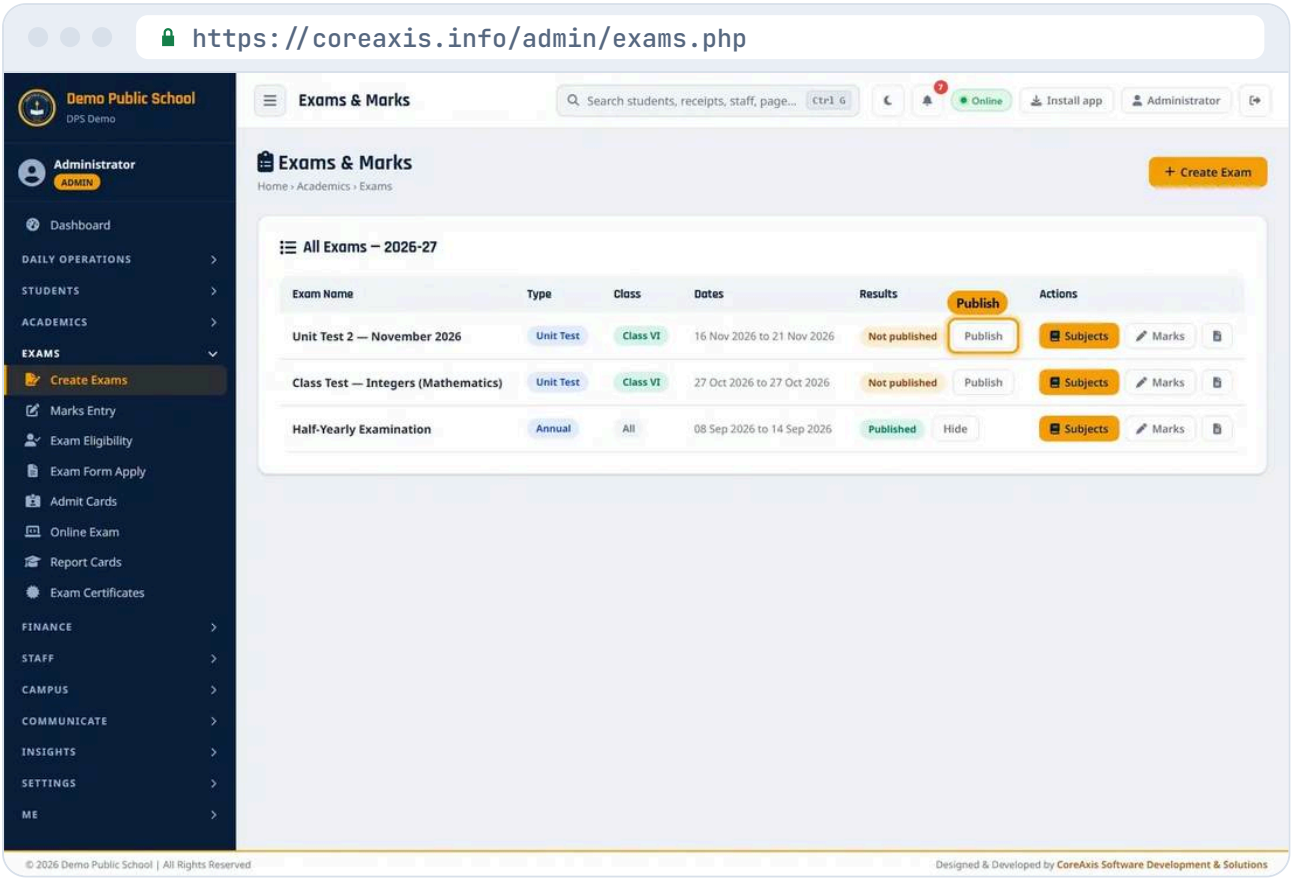
TIP The list shows the subjects taught in the exam's class (see Academics › Subjects).

Publish results

After marks are entered and checked (see Marks Entry), publish the exam so students and parents can see the marks. Only the Principal or an Admin can publish.

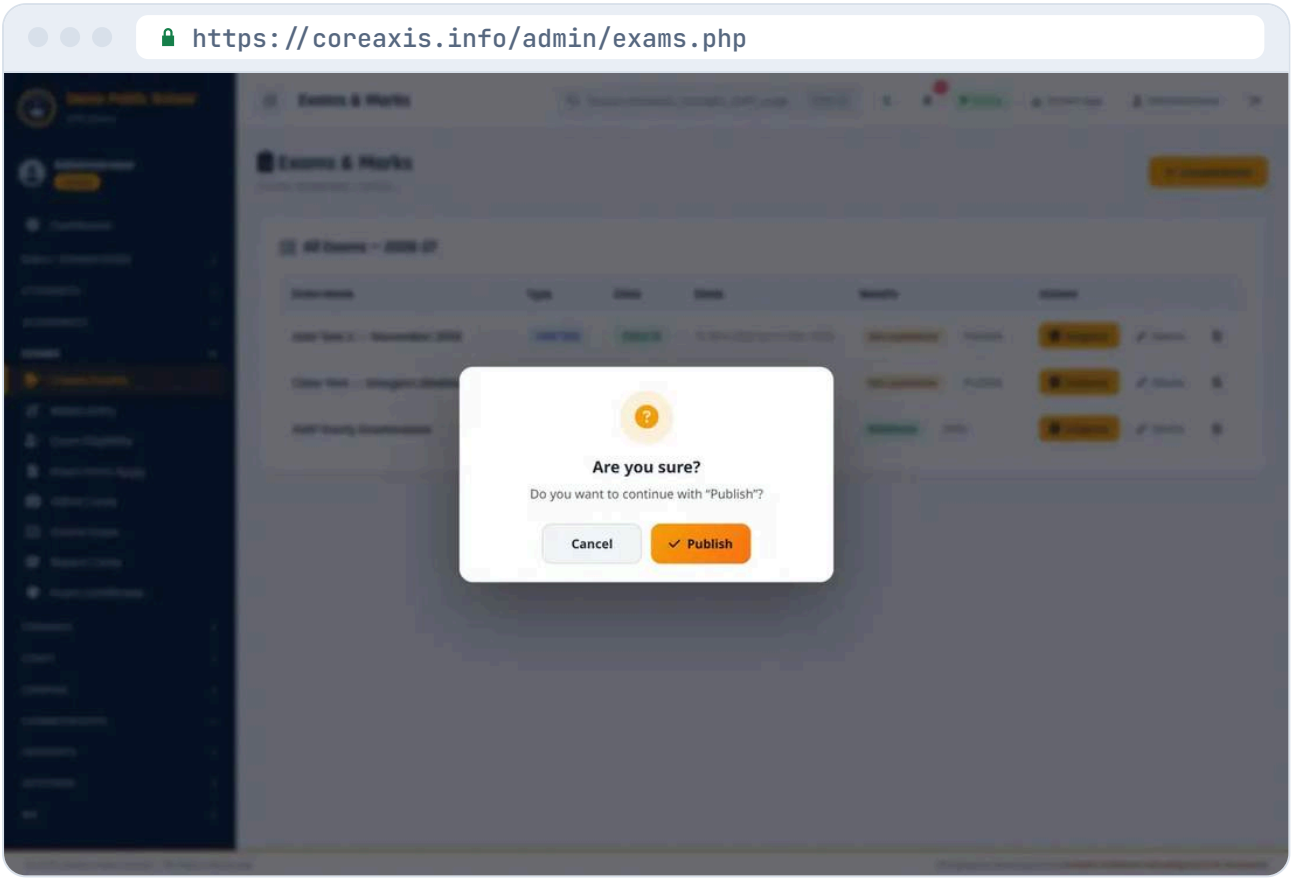
1 Open **Exams › Create Exams**. In the exam's row the **Results** column shows **Not published**.

2 Click **Publish** next to it.



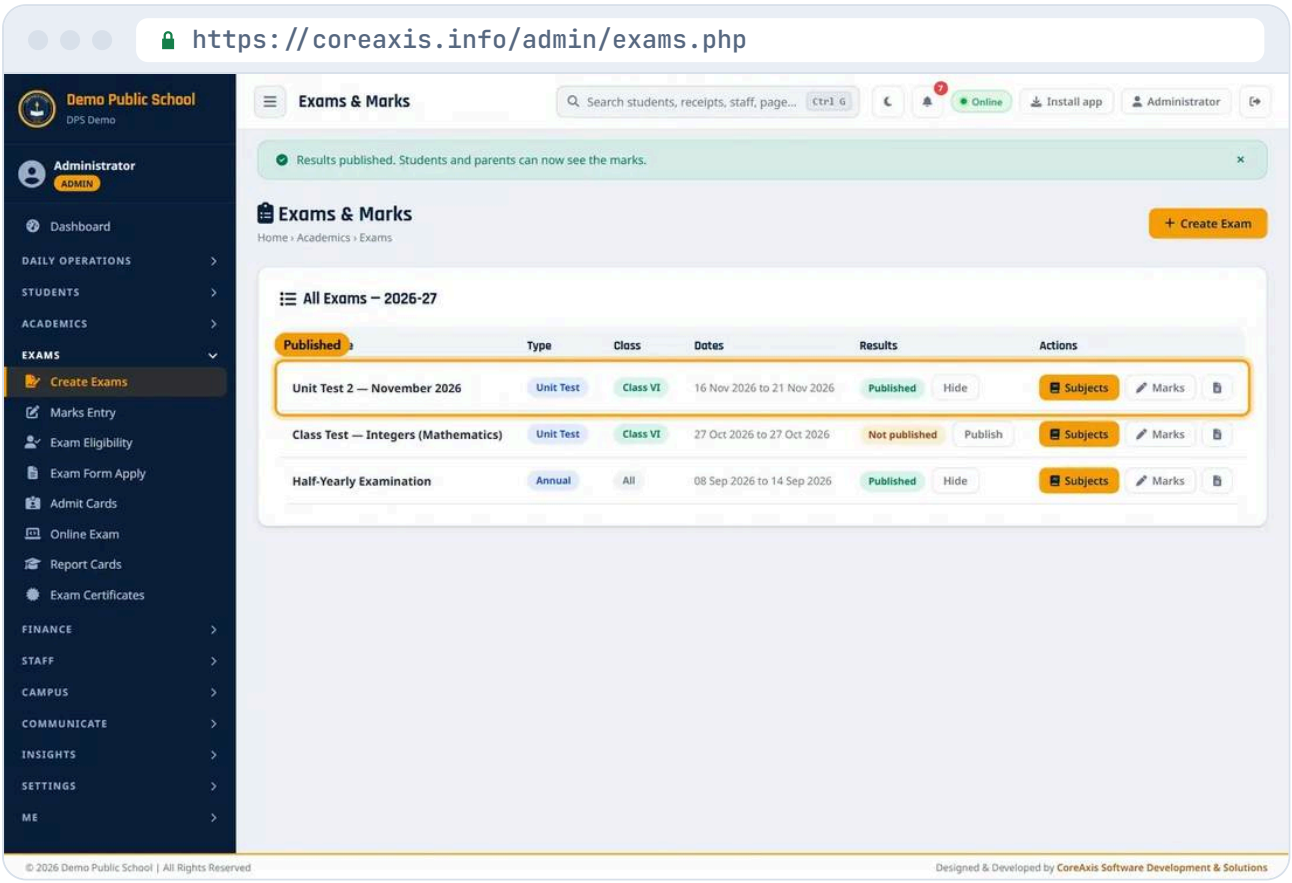
The Publish button in the Results column.

3 Click **Publish** in the confirmation popup.



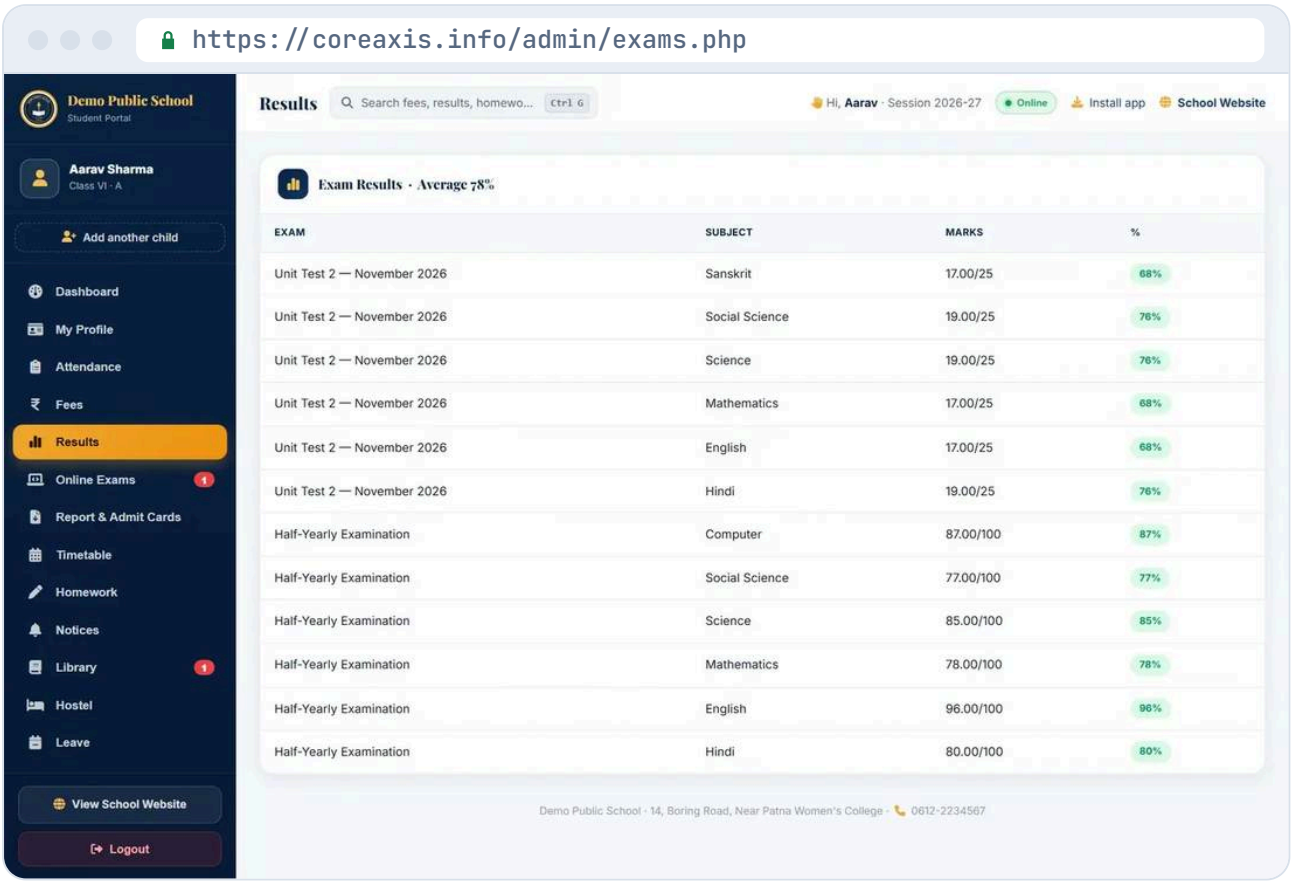
Confirm publishing.

4 The message "Results published. Students and parents can now see the marks." appears and the badge turns green: **Published**.



Unit Test 2 is published.

5 Students and parents now see the marks under **Results** in the portal and the mobile app.



Aarav Sharma's portal shows his Unit Test 2 marks subject by subject.

TIP Click **Hide** to take results back from the portal, for example to correct a mark. Publish again when done.

TIP Marks can still be changed after publishing. Parents see the change at once, so check marks before you publish.

Edit or delete an exam

1 Open the exam (click **Subjects** in its row).

2 Click **Edit** to change the name, type, class or dates, then **Save** in the form.

3 Click **Delete** only for an exam created by mistake. Confirm twice. Only Admin and Principal see the Delete button.

IMPORTANT Delete removes the exam and ALL its marks. It cannot be reversed. Do not delete a published exam that parents have already seen; use Hide instead.

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Questions

Which exam type should I choose?

Unit Test for class tests and periodic tests, Half Yearly for Term I, Annual / Yearly for the final exam, Pre-Board for Class X and XII practice. On the report card, Term I is usually the Half Yearly exam and Term II the Annual exam.

Unit Test 2 is held for every class. Do I create it many times?

You have two choices. Create it once for All Classes: the subjects, marks and dates are the same for every class, and marks are entered class by class (each class teacher sees their own class). Or create one exam per class with the same name (Unit Test 2 — November 2026) when classes have different subjects or dates.

Can a teacher publish results?

No. Teachers can create exams and enter marks for their own class. Only the Principal or an Admin sees the Publish / Hide and Delete buttons.

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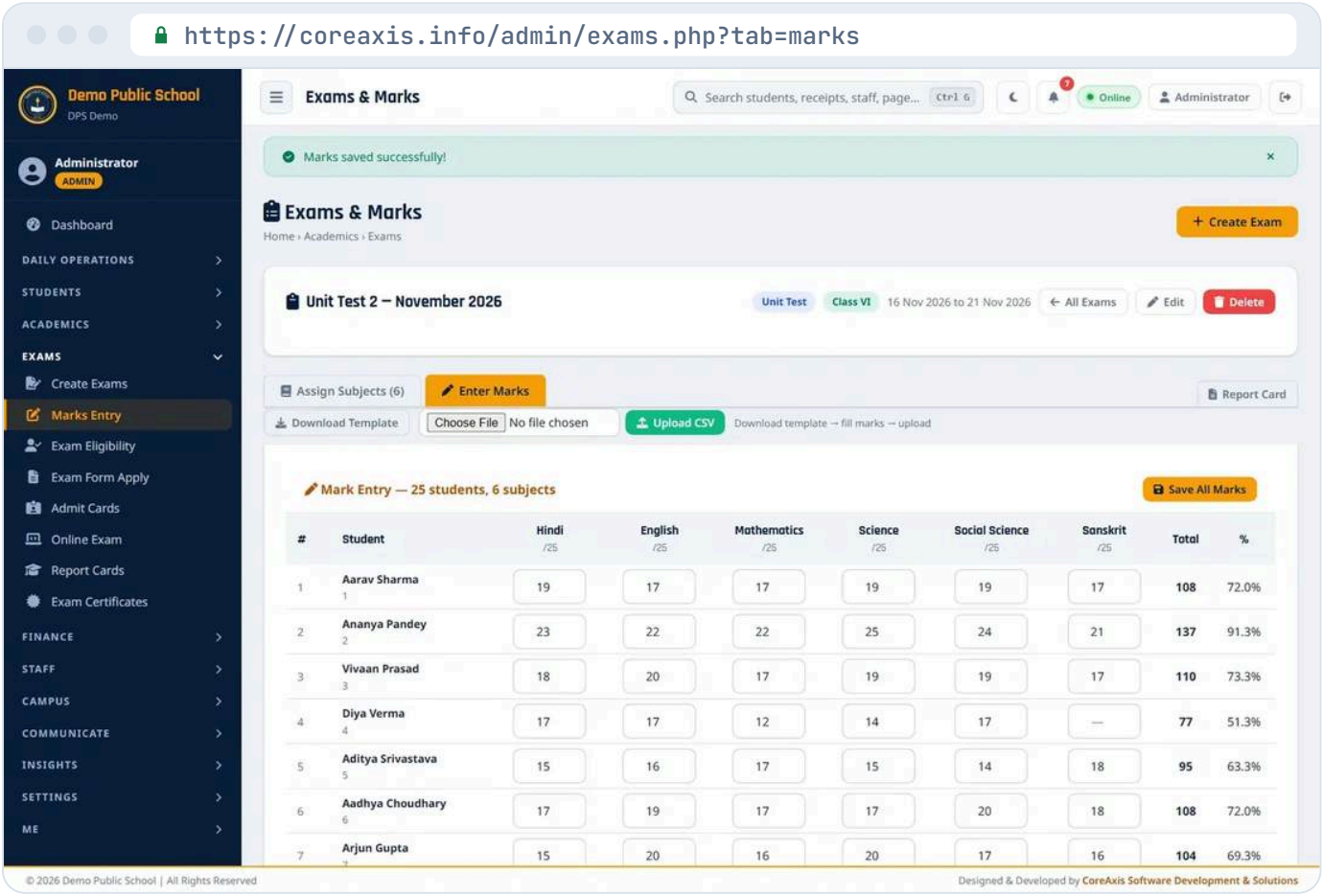
EXAMS · CHAPTER 17

Marks Entry

Admin | Principal | Teacher (own class)

MENU Exams › Marks Entry (Teacher: My Class › Marks)

Marks are entered on one sheet per exam: one row per student and one column per subject assigned to the exam. Totals and percentages update as you type. For an exam set for All Classes (such as the Half-Yearly Examination) you pick the class in the Class box and enter that class's marks. Marks feed report cards, exam certificates (rank and percentage) and, once the exam is published, the Results tab of the student and parent portal. Teachers enter marks only for the class they are class teacher of.



Marks Entry — Demo Public School

Screen at a glance

Exam list	Exams › Marks Entry first shows the exam list. Click Marks in an exam's row to open its sheet.

Assign Subjects (n) / Enter Marks tabs	Switch between the subject set-up and the marks sheet of the same exam.
Class (All Classes exams only)	Shown on the Enter Marks tab of an exam set for All Classes. Pick the class whose marks you are entering; the sheet reloads with that class's students. Teachers see only their own class in the list.
Download Template	Downloads a CSV file with one row per student and one column per subject (with its maximum).
Choose File + Upload CSV	Uploads the filled template and saves all marks at once.
Mark Entry — n students, n subjects	The sheet title. Save All Marks appears above and below the sheet.
Student column	Name with roll number, in roll-number order.
Subject columns	One box per subject; the heading shows the maximum (for example /25). An empty box shows a dash.
Total / %	Worked out as you type, out of the total maximum of all subjects.
Report Card	Opens Report Cards for this exam's class.

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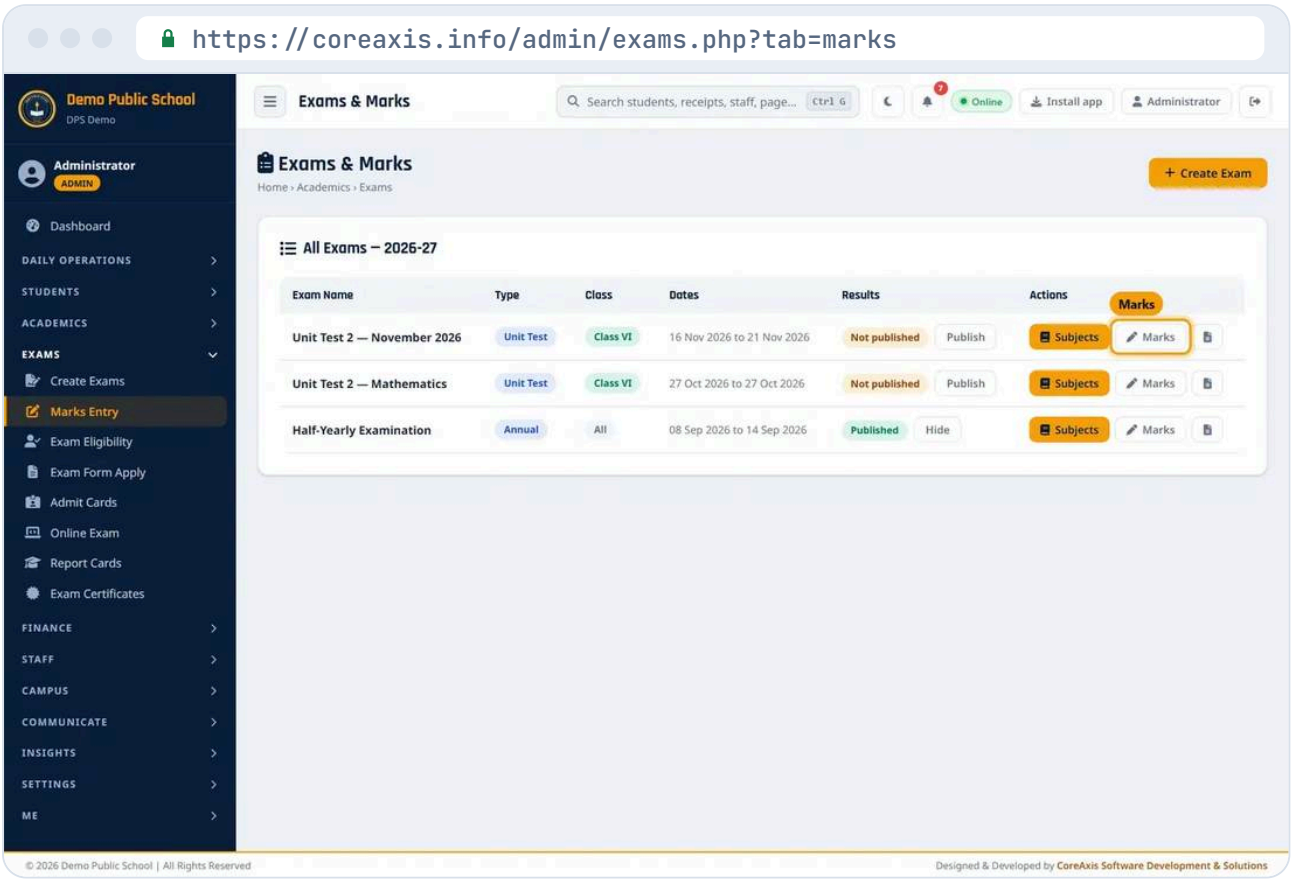
Enter marks (example: Unit Test 2 — November 2026, Class VI)

1. Open **Exams › Marks Entry**. In the row of **Unit Test 2 — November 2026**, click **Marks**.

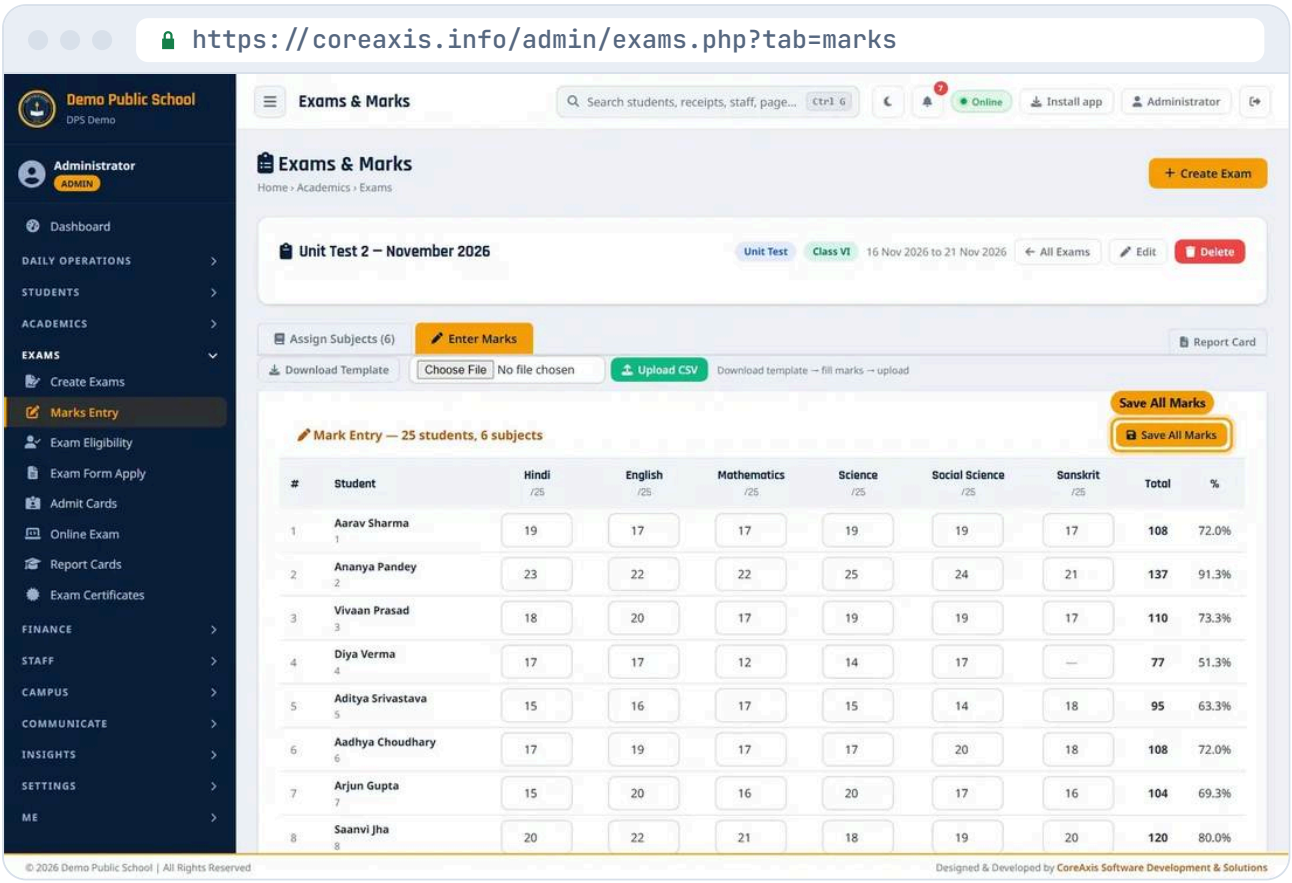


Pick the exam.

2. The **Enter Marks** tab opens with 25 students and 6 subjects, each out of 25.

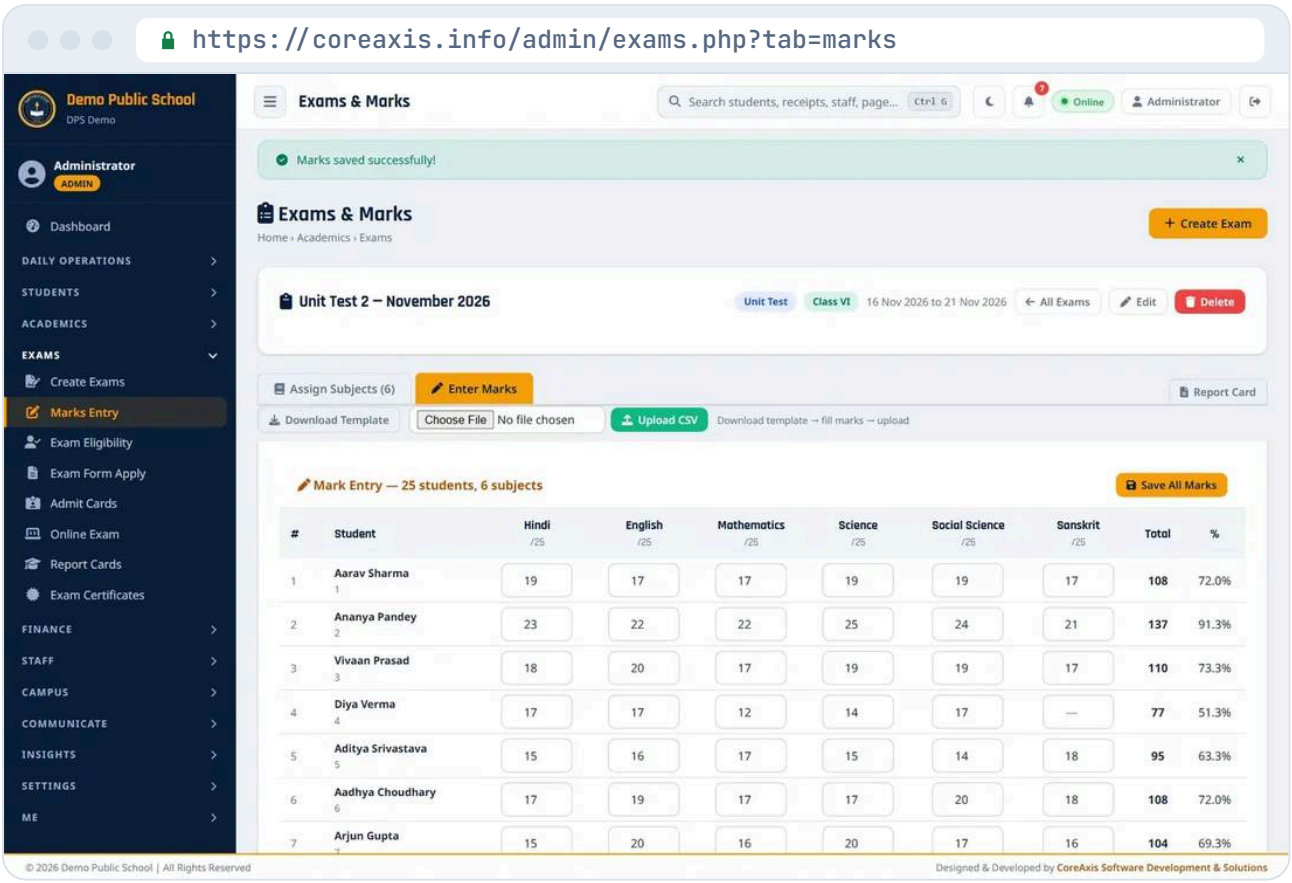
3. Type each student's marks in the subject boxes. Press **Tab** to move to the next box. For example, Aarav Sharma: Hindi 19, English 17, Mathematics 17, Science 19, Social Science 19, Sanskrit 17 — the Total shows 108 and % shows 72.0%.

4 Leave a box empty if the student was absent for that paper (Diya Verma, Sanskrit, in the example).



Marks typed in; totals and percentages update as you type.

5 Click **Save All Marks**, then **Save All Marks** in the confirmation popup. The message "Marks saved successfully!" appears.



Saved: the marks show exactly as typed.

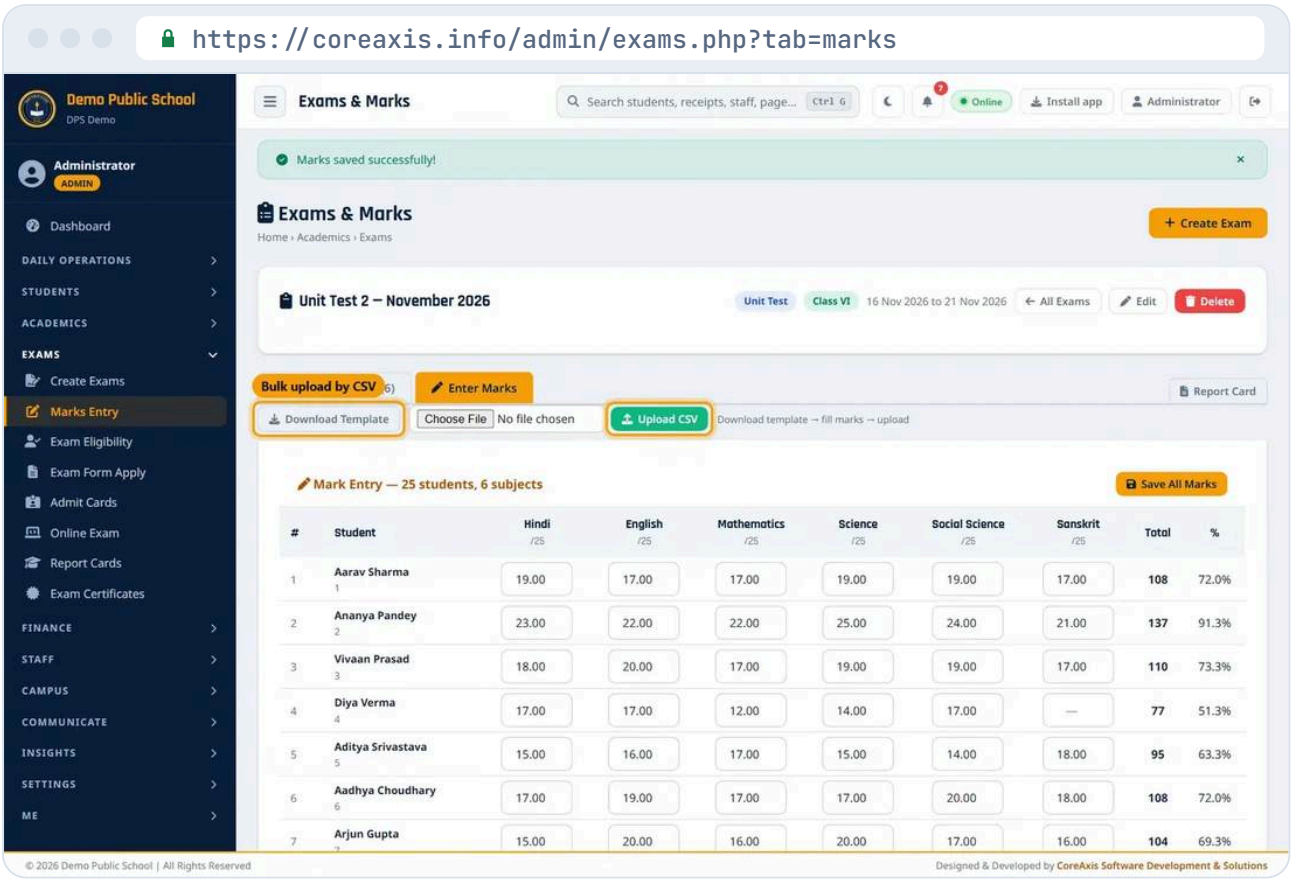
TIP Save often. Marks are saved only when you click Save All Marks; leaving the page without saving loses what you typed.

TIP A box does not accept more than the subject's maximum, and the app never saves more than the maximum or less than 0. Half marks such as 17.5 are allowed.

TIP You can come back and change any mark later; save again to update it.

Upload marks from Excel (CSV)

1. On the **Enter Marks** tab, click **Download Template**. A file named like marks_template_exam2.csv downloads.



Download Template, then Upload CSV.

2. Open the file in Excel. Do not change the first three columns (student_id, admission_no, student_name) or the header row.

3. Type the marks under each subject column and save the file as CSV.

4. Click **Choose File**, pick the saved CSV and click **Upload CSV**. The message tells you how many marks were saved and how many rows were skipped.

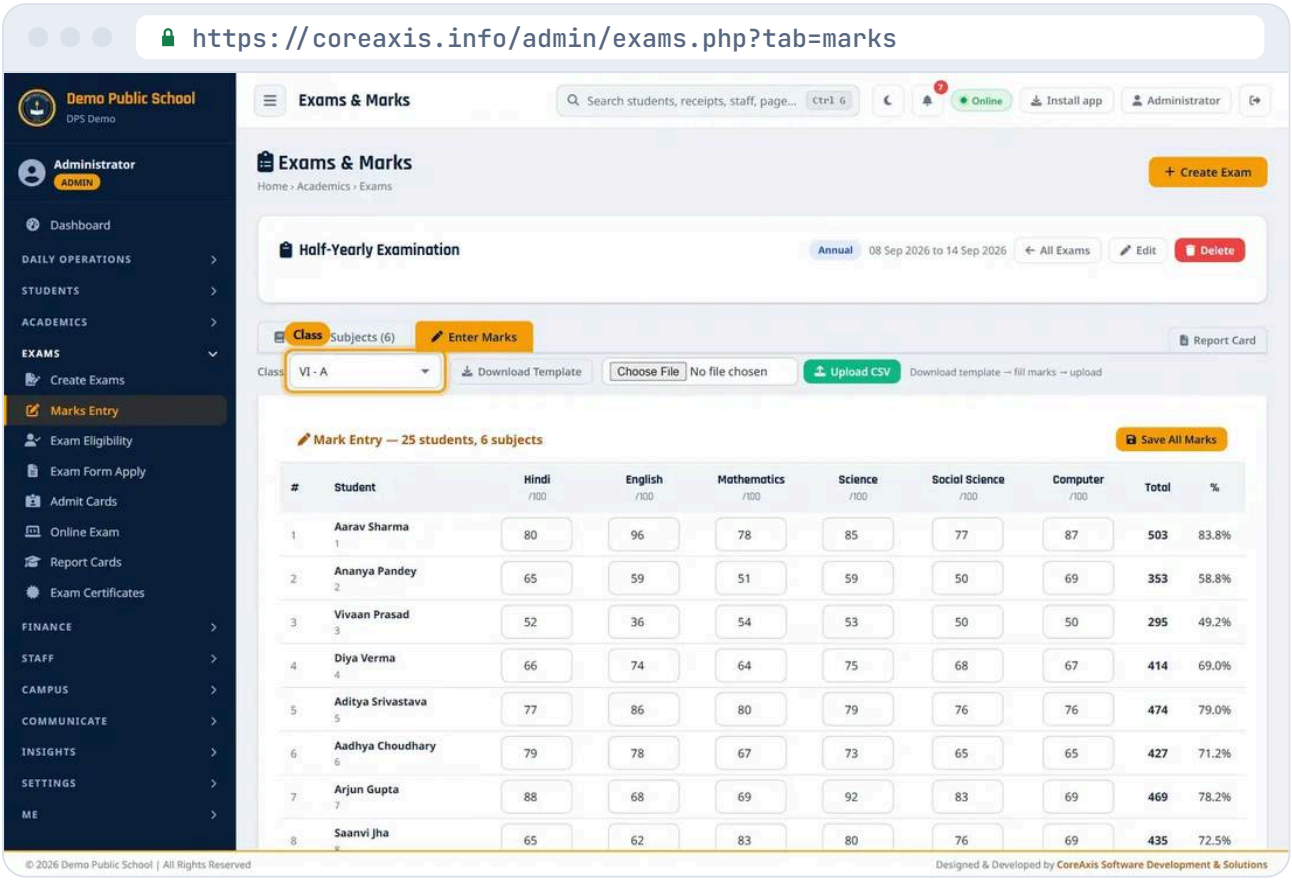
IMPORTANT Uploading replaces the marks of the subjects in the file. A blank cell in the CSV is saved as no mark, even if a mark was entered earlier on screen. Fill every cell, or remove columns you did not fill.

Enter marks for an All Classes exam (example: Half-Yearly Examination, Class VI-A)

The Half-Yearly Examination was created once for All Classes. Its marks are entered class by class.

1. Open **Exams › Marks Entry**. In the row of **Half-Yearly Examination** (Class: All), click **Marks**.

2. On the **Enter Marks** tab, pick **VI - A** in the **Class** box. The sheet reloads with the 25 students of Class VI-A and the exam's 6 subjects, each out of 100.



The Class box appears only for an All Classes exam.

3. Type or correct the marks, for example Aarav Sharma: Hindi 80, English 96, Mathematics 78, Science 85, Social Science 77, Computer 87 (Total 503, 83.8%).

4. Click **Save All Marks** and confirm. Only the marks of the class shown are saved.

5. Pick the next class in the **Class** box and repeat.

TIP **Download Template** and **Upload CSV** also work for the class chosen in the Class box.

TIP A class teacher sees only their own class in the Class box, so each teacher enters the marks of their own class.

Lock and publish rules

Before publishing	Marks are visible only to staff. Students and parents see nothing for this exam.
Publish	Only the Principal or an Admin can publish (Exams › Create Exams › Publish). Students and parents then see the marks under Results.
After publishing	Marks are not locked. Any change you save shows in the portal at once. To correct marks quietly, click Hide, fix and save, then Publish again.
Who can enter marks	Admin and Principal for every class. A teacher for their own class only, and only if their role has the Marks permission.
All Classes exams	The sheet lists one class at a time. Pick the class in the Class box, enter and save its marks, then pick the next class. Subjects, maximum marks and dates are the same for every class.

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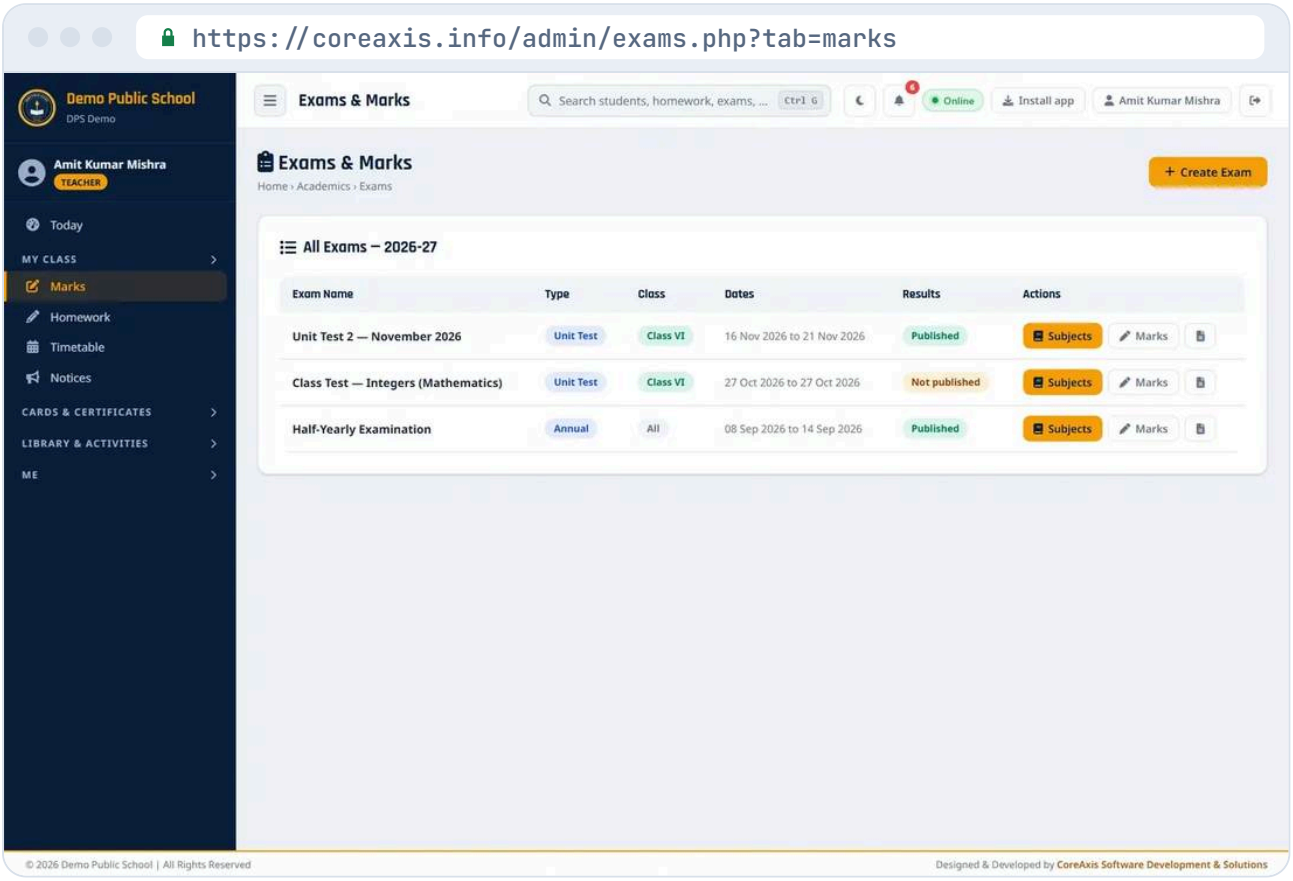
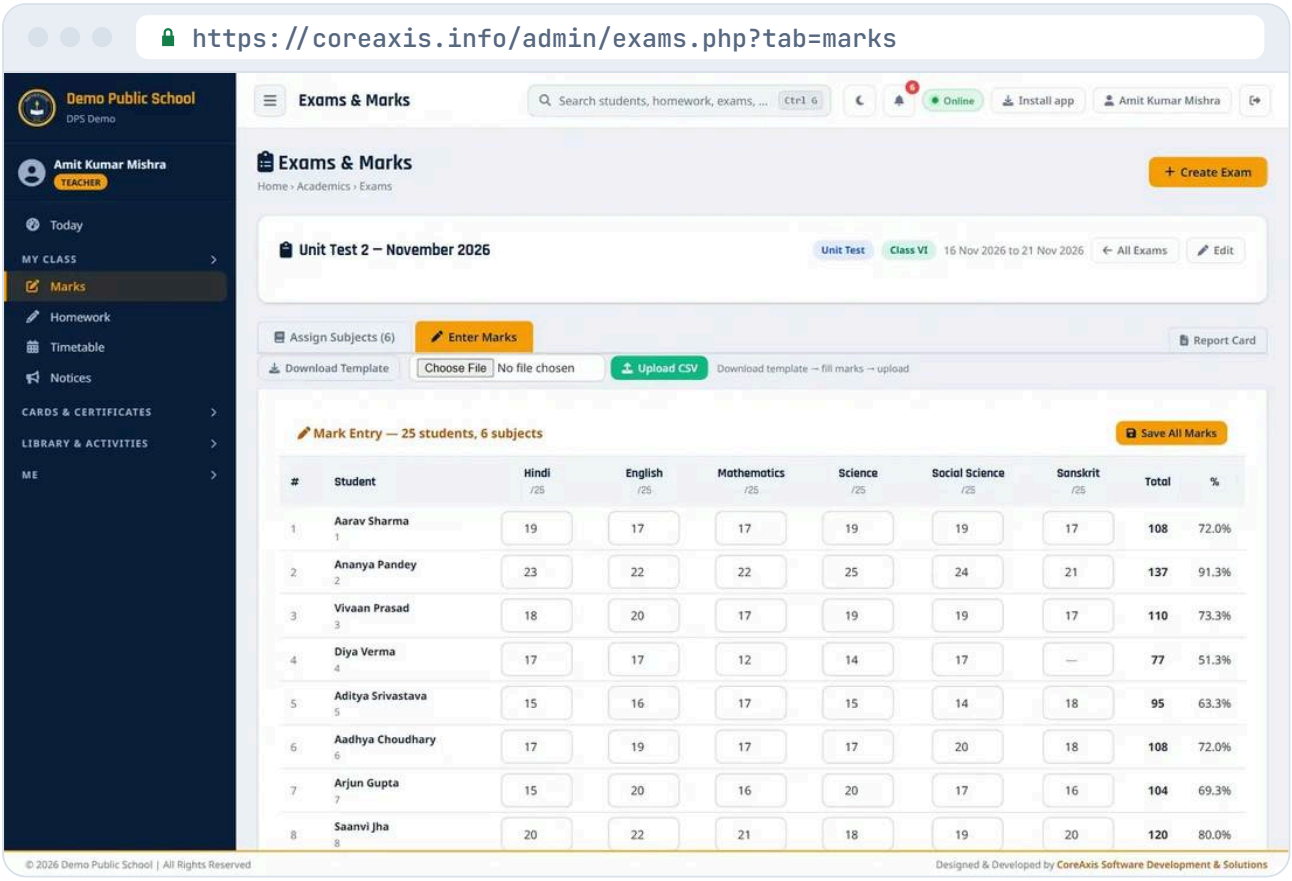
Teacher's view

1. A class teacher opens **Marks** from **My Class**. The list shows their class's exams and the exams set for All Classes (Amit Kumar Mishra sees the Class VI exams and the Half-Yearly Examination).



Teacher: Class VI exams and the All Classes Half-Yearly, with no Publish button.

2 The marks sheet works the same way as for the office.



Teacher Amit Kumar Mishra on the Unit Test 2 sheet.

TIP Teachers cannot publish results or delete an exam. They tell the Principal when marks are complete.

TIP For an All Classes exam, a teacher can enter marks for their own class only; the subjects and dates are set by the Principal or an Admin.

Questions

A subject is missing from the marks sheet.

It is not ticked for this exam. Open the Assign Subjects tab, tick it with its maximum and pass marks, and click Save Subject Assignment.

A new student joined after marks were entered. How do I add their marks?

Open the sheet again. Every active student of the class is listed, including new admissions. Type their marks and save.

How do I mark a student absent for a paper?

Leave the box empty. On the sheet it shows as a dash. Note that the Total and % on the sheet are still worked out of the full maximum of all subjects (Diya Verma: 77 out of 150 = 51.3%).

How does a class teacher enter marks for the Half-Yearly Examination?

Open Marks, click Marks in the Half-Yearly Examination row and check that your class is shown in the Class box. Enter the marks and click Save All Marks. Only your own class is listed.

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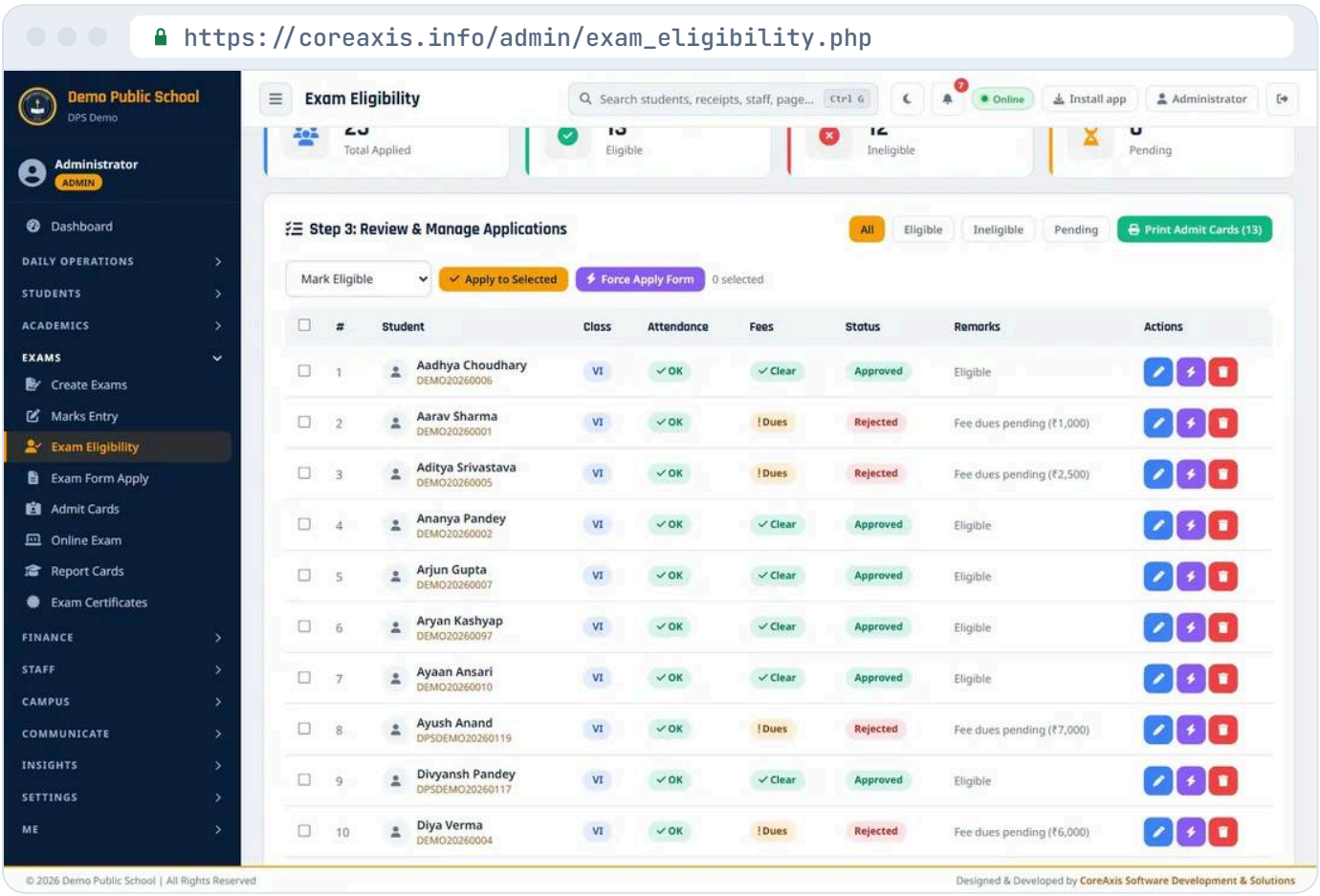
EXAMS · CHAPTER 18

Exam Eligibility

Admin Principal MENU Exams › Exam Eligibility

Exam Eligibility is the first step of the exam workflow: Eligibility → Exam Form Apply → Admit Card → Marks Entry → Report Card → Certificate. You set the rules for an exam (minimum attendance and whether fees must be clear), run an automatic check for a class, and then review the result. Only students marked Approved can have their exam form submitted and get an admit card. The Principal can let a student sit the exam in spite of the rules with Force Apply.



Exam Eligibility — Demo Public School

Screen at a glance

Step 1: Select Exam & Set Rules	Select Exam, Filter Class, and the Eligibility Rules box: Min Attendance % and Fee Clearance Required, with Save Rules.

Step 2: Auto-Check Eligibility	Pick a class and click Auto-Check (Attendance + Fee). The note beside it repeats the rules in use.
Total Applied / Eligible / Ineligible / Pending	Counts of students checked for this exam and their status.
Step 3: Review & Manage Applications	Filter buttons All / Eligible / Ineligible / Pending, and Print Admit Cards (n) once a class is selected and some students are eligible.
Bulk bar	Tick students, then Mark Eligible / Mark Ineligible + Apply to Selected, or Force Apply Form.
Attendance column	OK (meets the minimum) or Low.
Fees column	Clear (no tuition dues to date) or Dues.
Status / Remarks	Approved, Rejected or Pending, with the reason (for example Fee dues pending (₹1,000) or Attendance 68% < 75%).
Actions	Pencil = Edit Status, purple bolt = Force Apply Exam Form, bin = remove the student's application. A green Applied badge replaces the bolt once the form is submitted.

Check eligibility for an exam (example: Unit Test 2, Class VI — 75% attendance, fees clear)

1. Open **Exams › Exam Eligibility** and pick **Unit Test 2 — November 2026 — Class VI** in **Select Exam**.
2. In **Eligibility Rules**, enter **75** in **Min Attendance %** and tick **Fee Clearance Required**.

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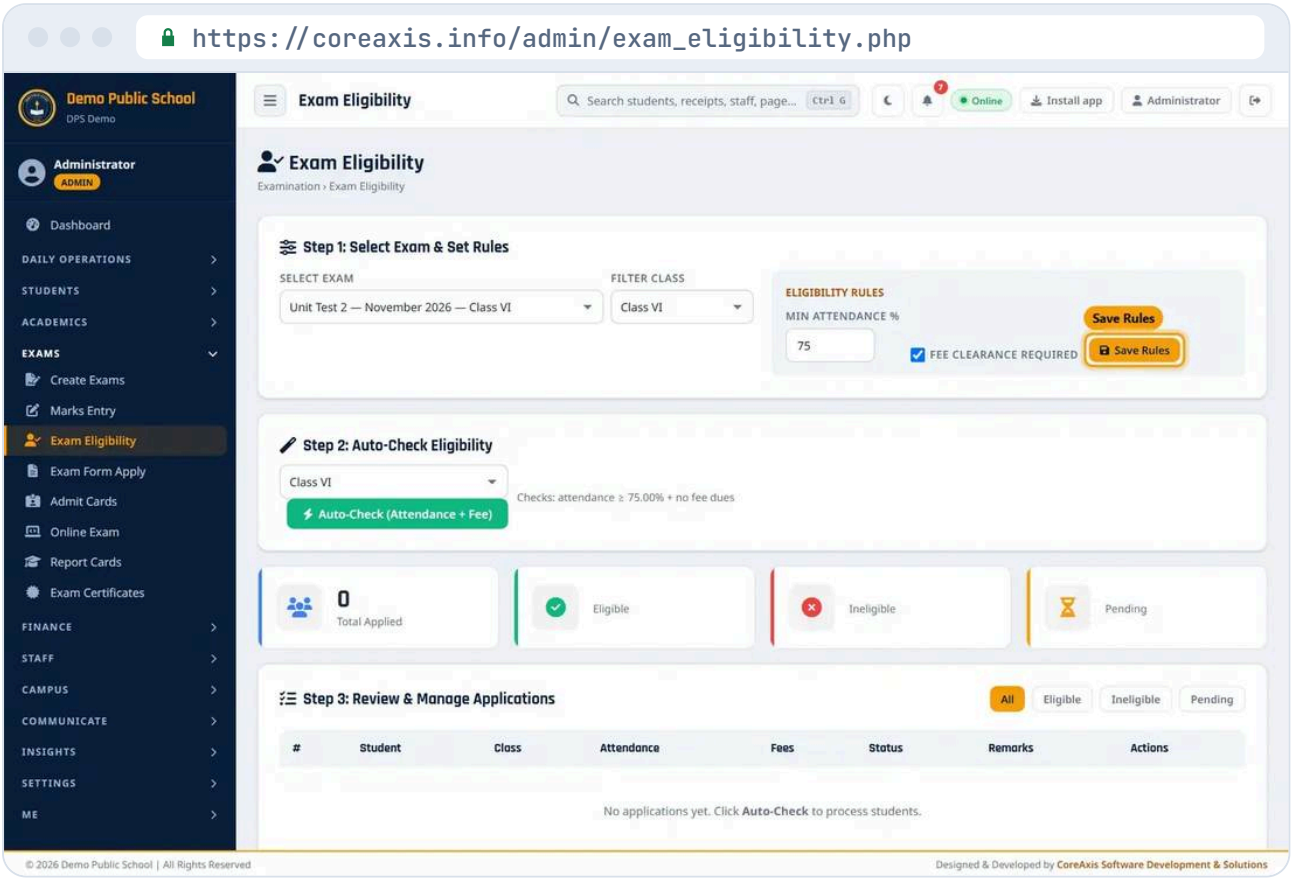
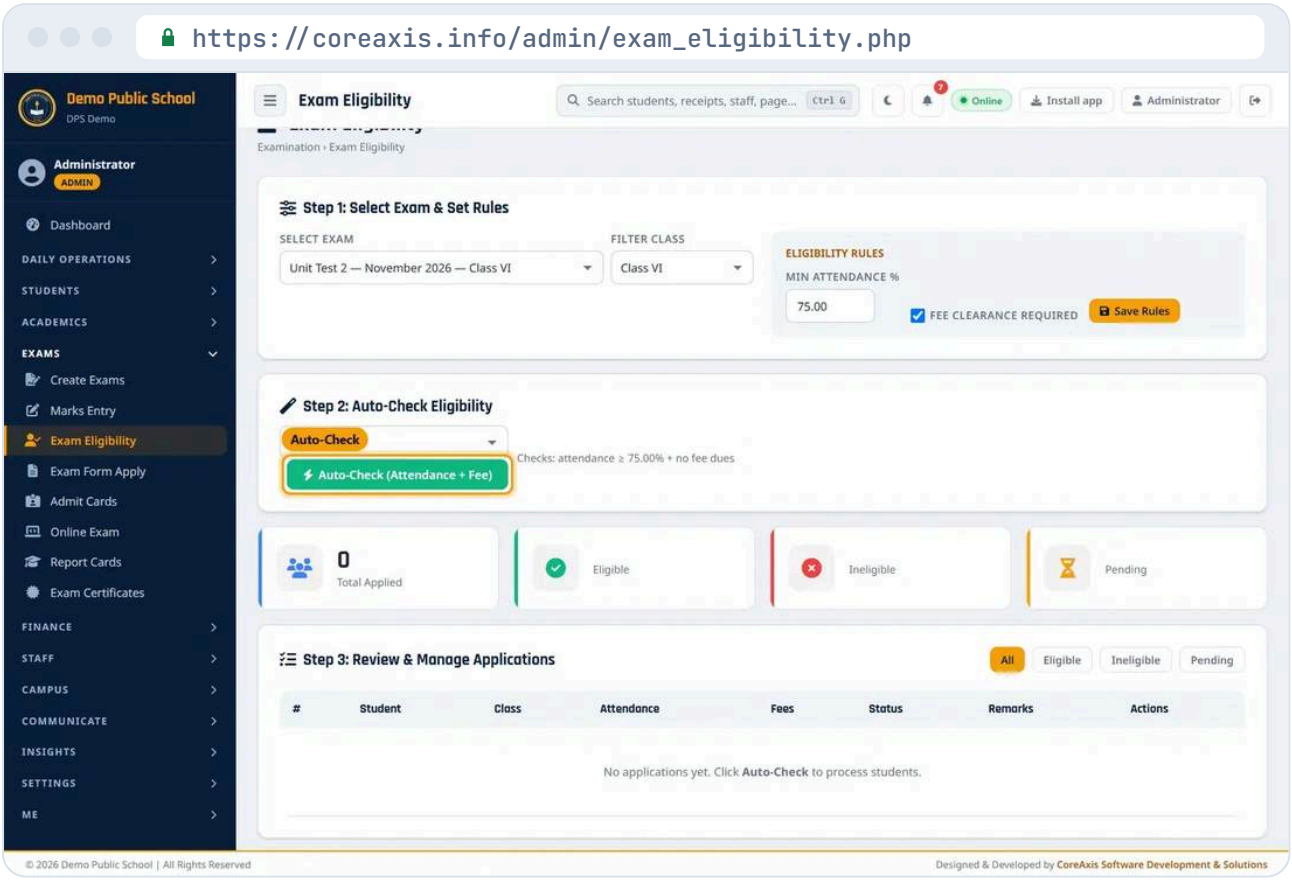
3 Click **Save Rules** and confirm. The message "Eligibility rules saved." appears.



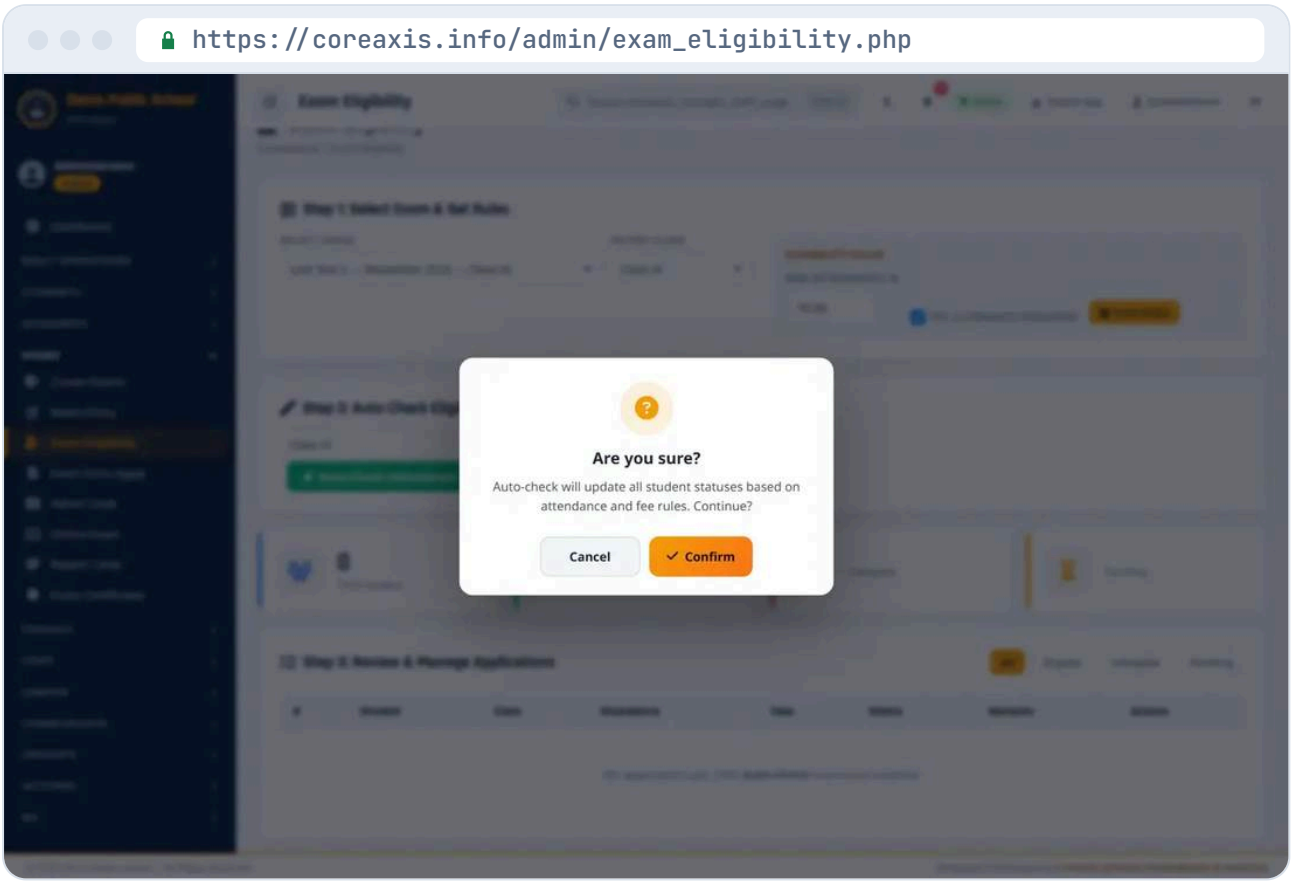
Step 1: exam and rules.

4 In **Step 2**, pick **Class VI** and click **Auto-Check (Attendance + Fee)**.



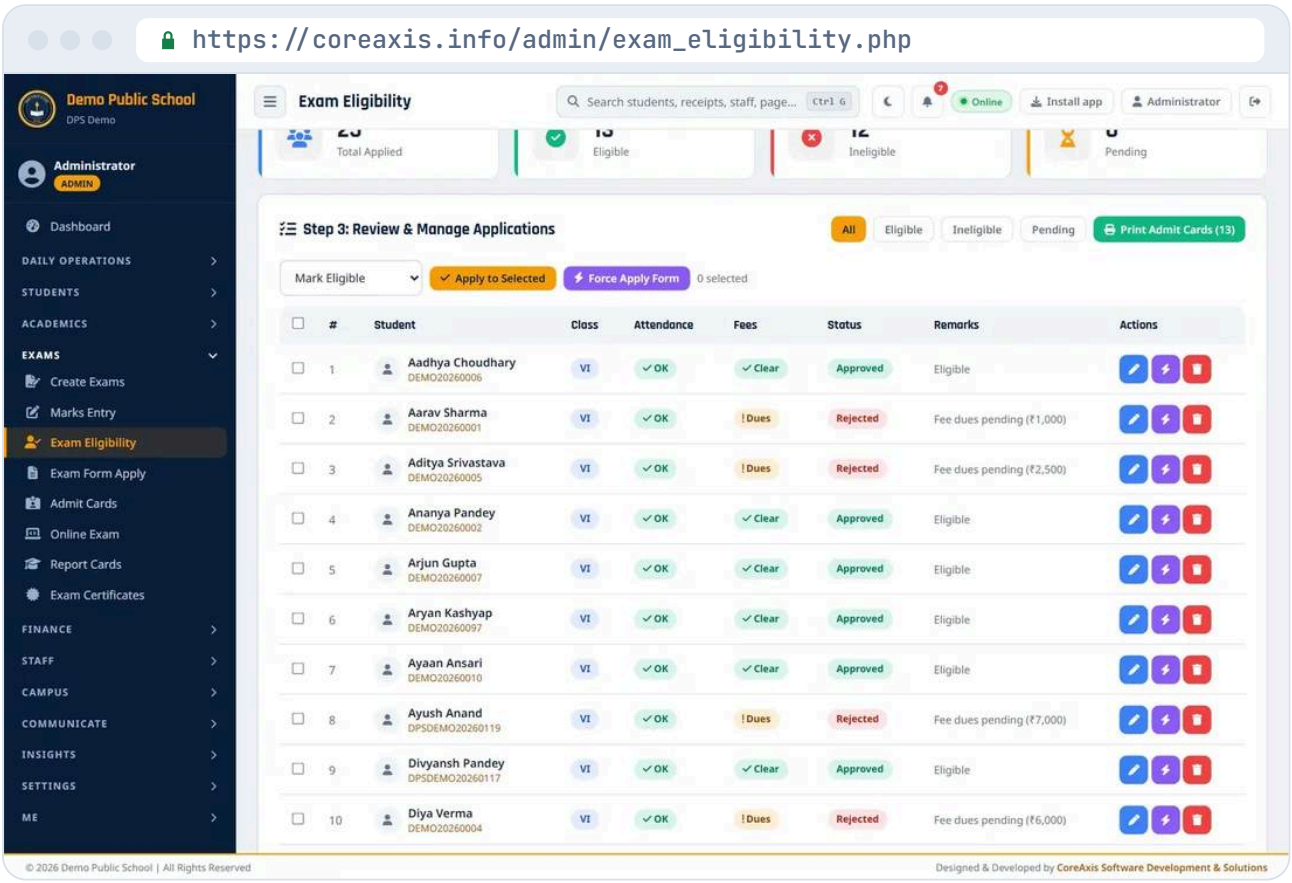
Step 2: run the automatic check for the class.

5 Read the popup ("Auto-check will update all student statuses based on attendance and fee rules. Continue?") and click **Confirm**.



Confirm the auto-check.

6 The message "Auto-check complete: 13 eligible, 12 ineligible." appears. Step 3 lists each student with Attendance, Fees, Status and the reason.



Aarav Sharma is Rejected: Fee dues pending (₹1,000).

TIP Attendance is this session's attendance (present days out of working days, holidays excluded) — the same figure as on the portal and report card.

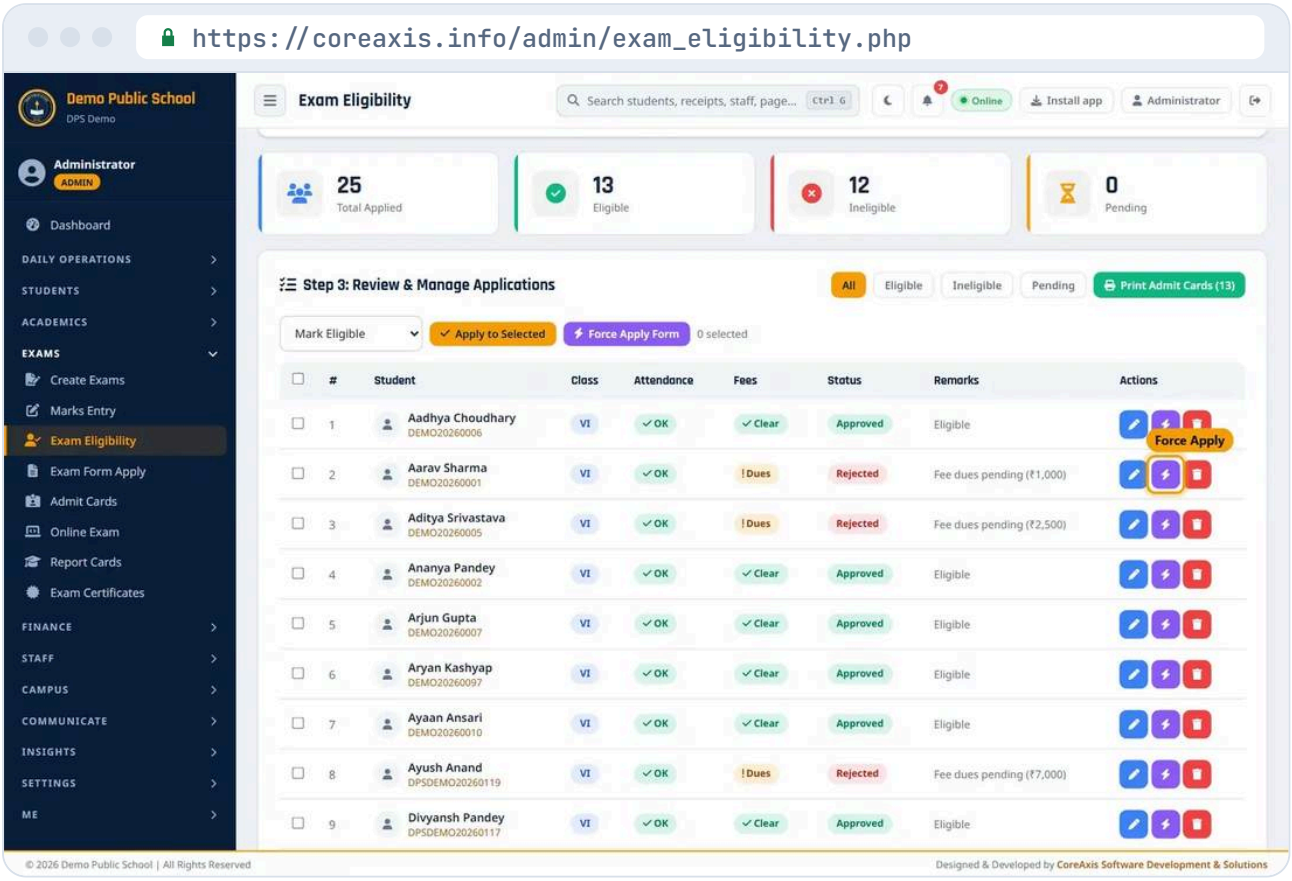
TIP Fee clearance means no tuition dues up to today, the same figure as the fee defaulter list.

TIP You can run Auto-Check again after parents pay. Students whose exam form is already submitted keep their decision.

Let a student sit the exam despite the rules (Force Apply)

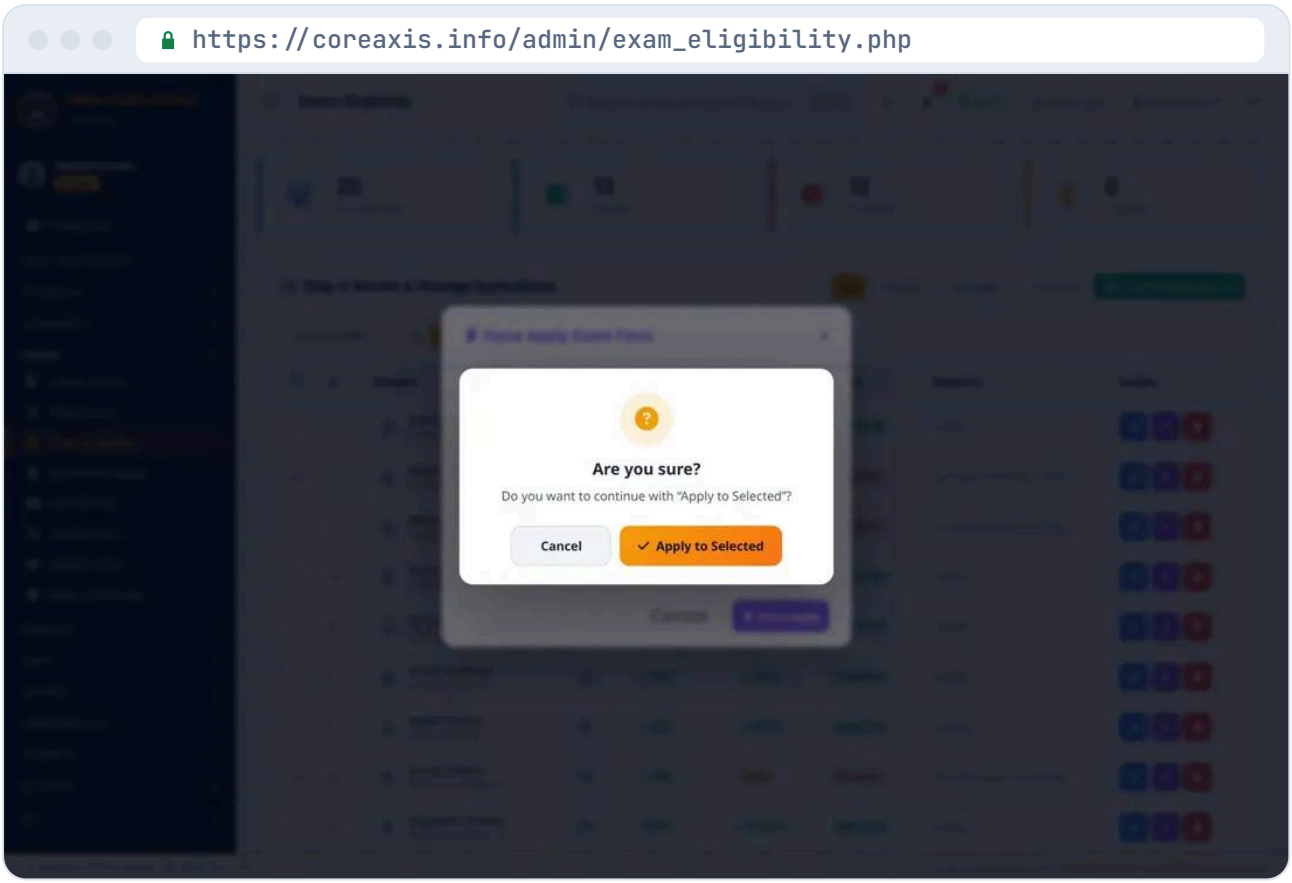
Aarav Sharma's father has promised to pay the ₹1,000 balance by 10 November. The Principal allows Aarav to sit the exam.

1 In Aarav Sharma's row, click the purple bolt (**Force Apply Exam Form**).



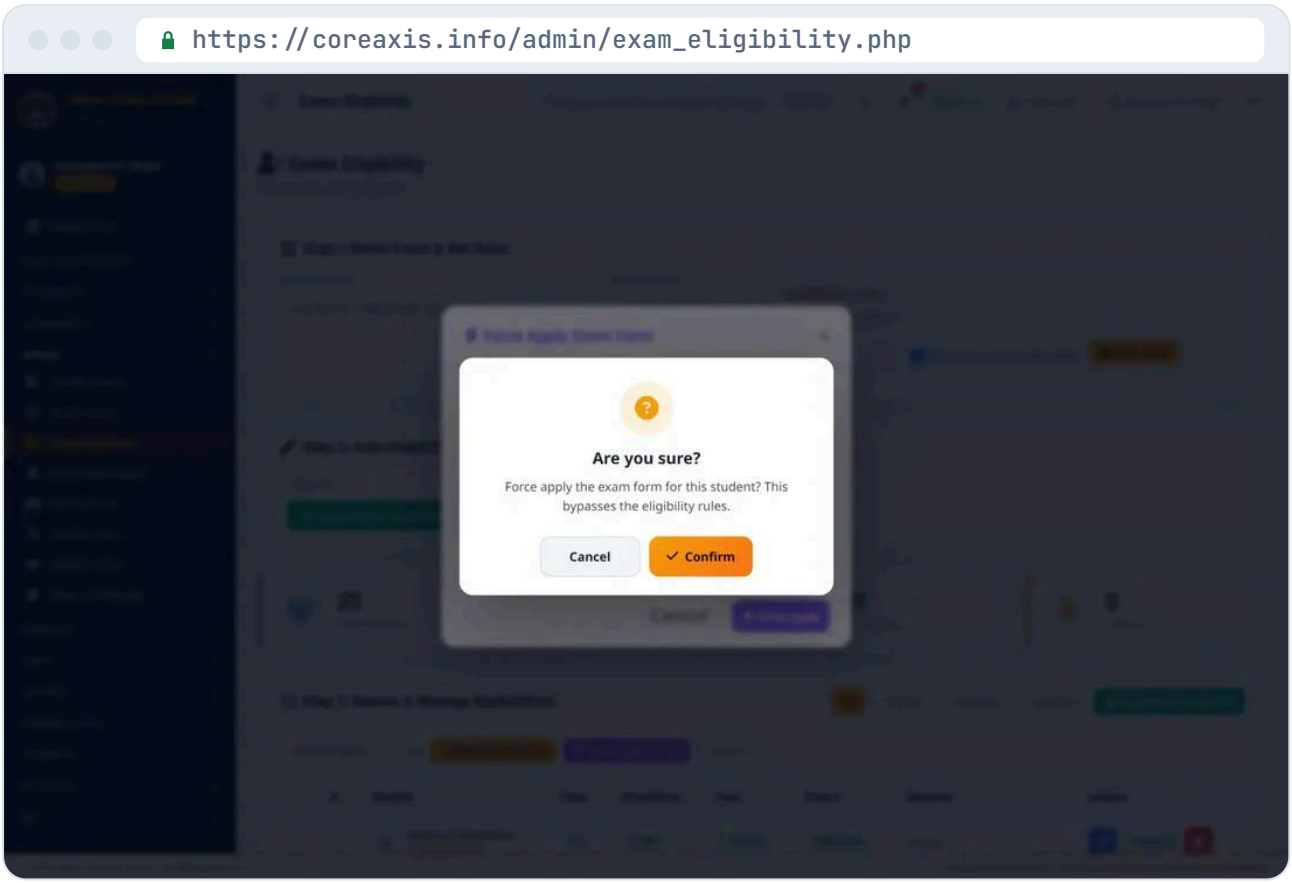
The Force Apply button.

2 In **Reason / Remark**, type: Special permission by Principal — balance of ₹1,000 to be paid by 10 Nov 2026.



Force Apply Exam Form with the reason.

3 Click **Force Apply**. The popup asks: "Force apply the exam form for this student? This bypasses the eligibility rules." Click **Confirm**.



Force Apply asks for confirmation with its own message.

4 The message "Exam form force-applied successfully." appears. Aarav is now Approved and his exam form is marked submitted.

TIP To force-apply several students together, tick them and click **Force Apply Form** in the bulk bar.

Change a student's status by hand

1 Click the blue pencil (**Edit Status**) in the student's row.

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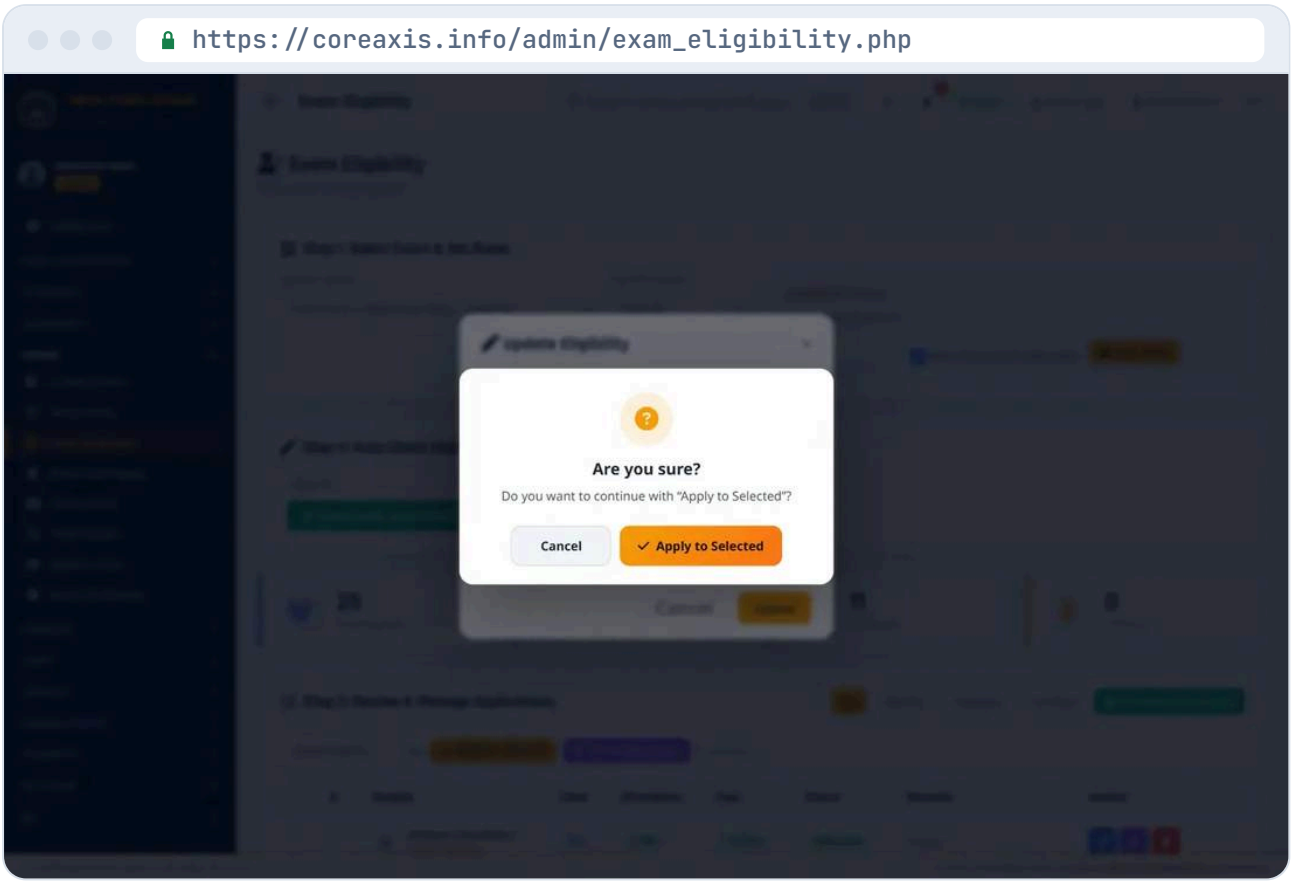
2 Pick **Pending**, **Approved (Eligible)** or **Rejected (Ineligible)** in **Status** and write a **Remarks** line.



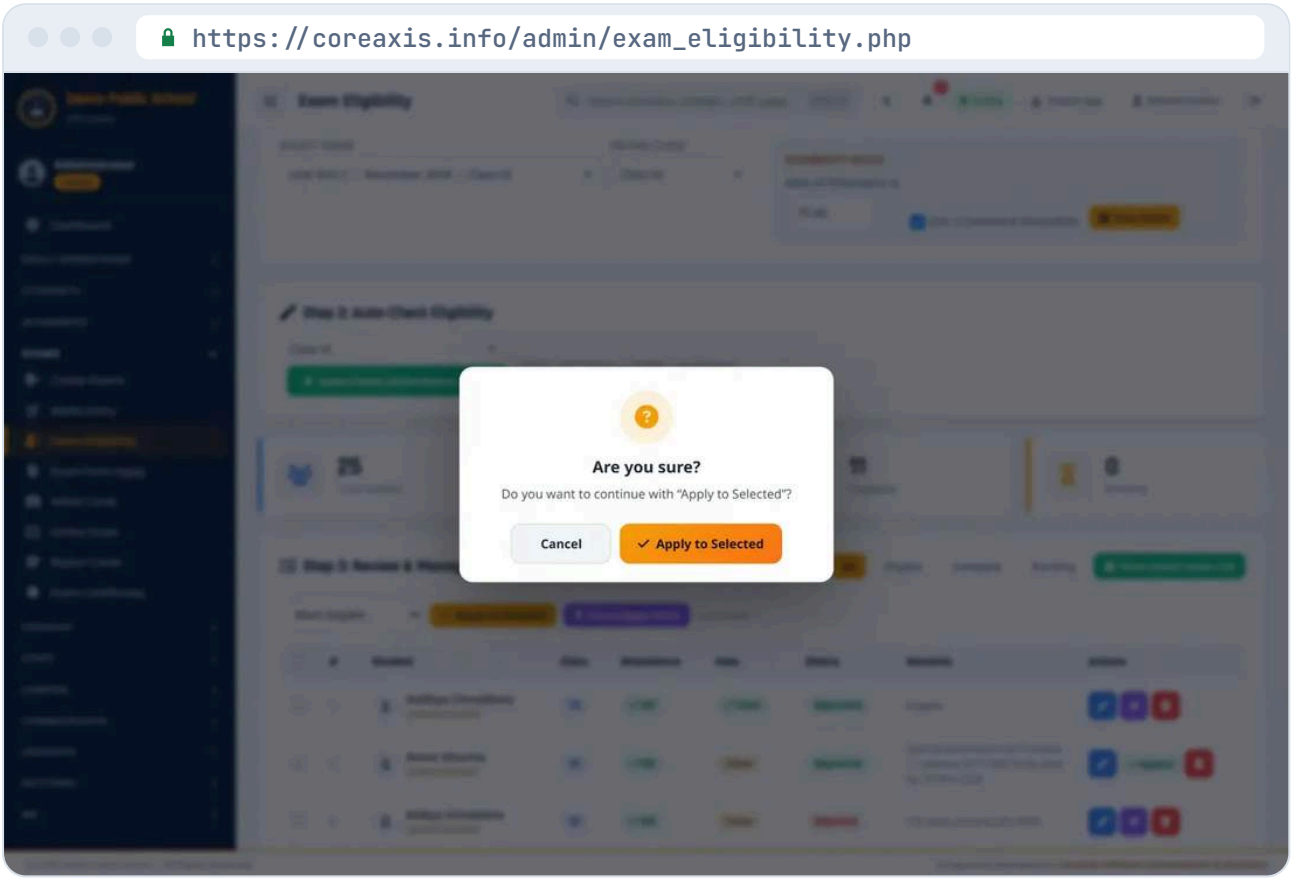
Update Eligibility.

3 Click **Update**.

4 For many students at once, tick them (or tick the box in the header row to select every student in the list), choose **Mark Eligible** or **Mark Ineligible** and click **Apply to Selected**. The change applies to every ticked row.

Next step

1. The counters now read 25 applied, 14 eligible, 11 ineligible. Go to **Exam Form Apply** to submit the forms of approved students, or click **Print Admit Cards** to go straight to the admit cards.



Summary after the auto-check and one force-apply.

Questions

Do I have to use Exam Eligibility for every exam?

Only if you want admit cards with that exam's schedule. The Admit Card page lists only Approved students of the chosen exam, so an exam that was never checked shows no students there. For a class test without admit cards you can skip it.

A parent paid today. How does the student become eligible?

Run Auto-Check again for the class, or set the student to Approved (Eligible) with Edit Status.

What does the bin do?

It removes the student's eligibility record for this exam (asks to confirm). Run Auto-Check again to recreate it.

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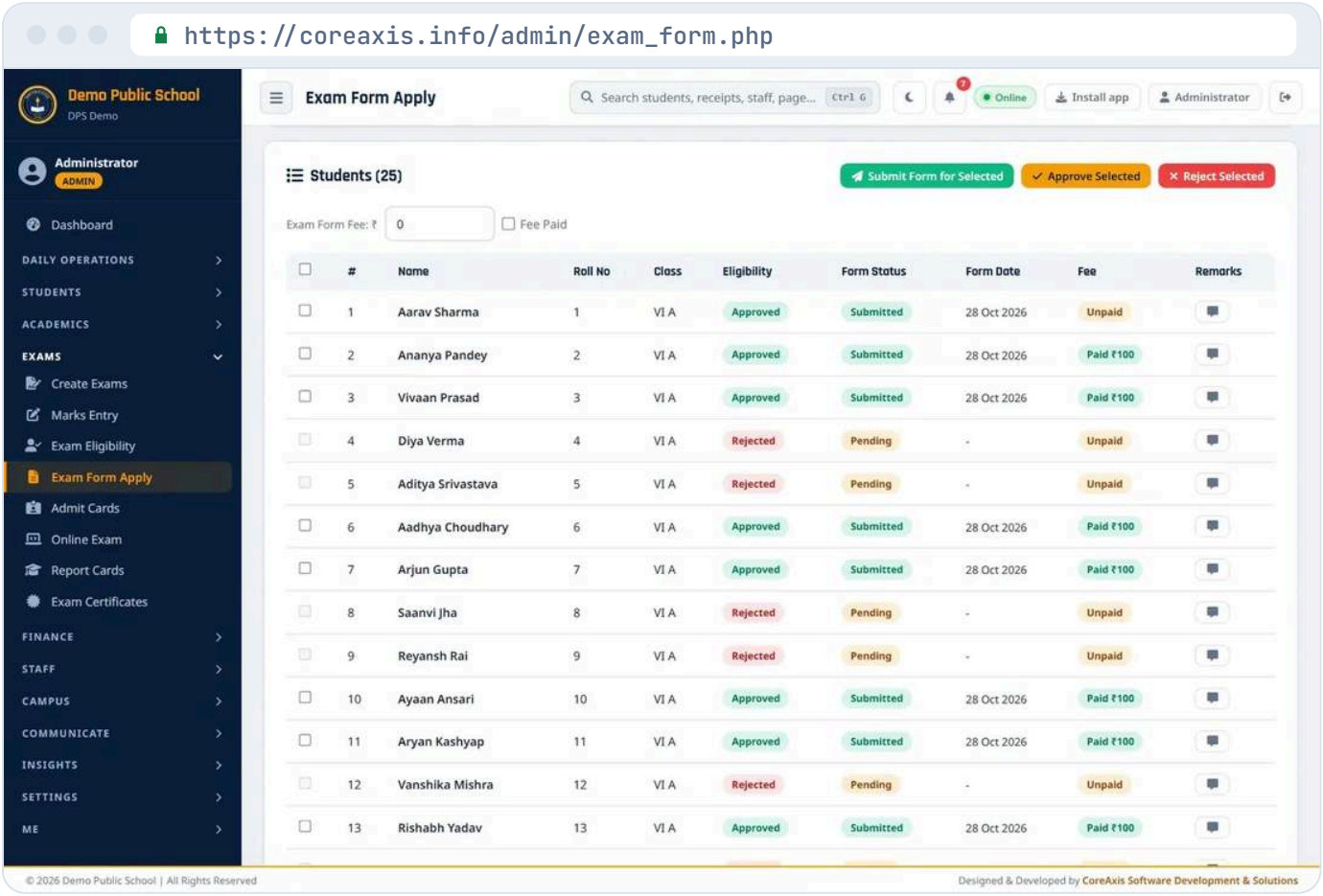
EXAMS · CHAPTER 19

Exam Form Apply

Admin Principal MENU Exams › Exam Form Apply

Exam Form Apply is the second step of the exam workflow, after Exam Eligibility. For each exam and class it lists the students with their eligibility, form status, form date and exam form fee. Only students Approved in Exam Eligibility can have their form submitted. An exam form fee is added to each student's fee account as an "Exam Form Fee" charge, so it shows at the Fee Desk and in the student's dues. Once any form of an exam is submitted, admit cards for that exam are printed only for students whose form is submitted.



Exam Form Apply — Demo Public School

Screen at a glance

Eligibility Check / Print Admit Cards	Buttons at the top to go to the step before and the step after.

Workflow note	Eligibility Check → Exam Form Apply (here) → Admit Card → Marks Entry → Report Card → Certificate.
Select Exam / Filter by Class / Status	Choose the exam, then narrow the list by class (classes are listed in school order: Play, Nursery, KG, I … IX) and by status (Approved, Pending, Rejected). Click Filter.
Exam summary	Exam name, type and start date, with counts: Eligible, Forms Submitted, Rejected, Pending.
Submit Form for Selected / Approve Selected / Reject Selected	Actions for the ticked students.
Exam Form Fee: ₹ and Fee Paid	The fee charged for the form. It is added to each submitted student's fee account as an "Exam Form Fee" charge. Tick Fee Paid if the money was collected now: the app then also makes a Cash receipt for it.
Table	Name, Roll No, Class, Eligibility, Form Status (Submitted / Pending), Form Date, Fee (Paid ₹… / Unpaid), Remarks (speech-bubble button).

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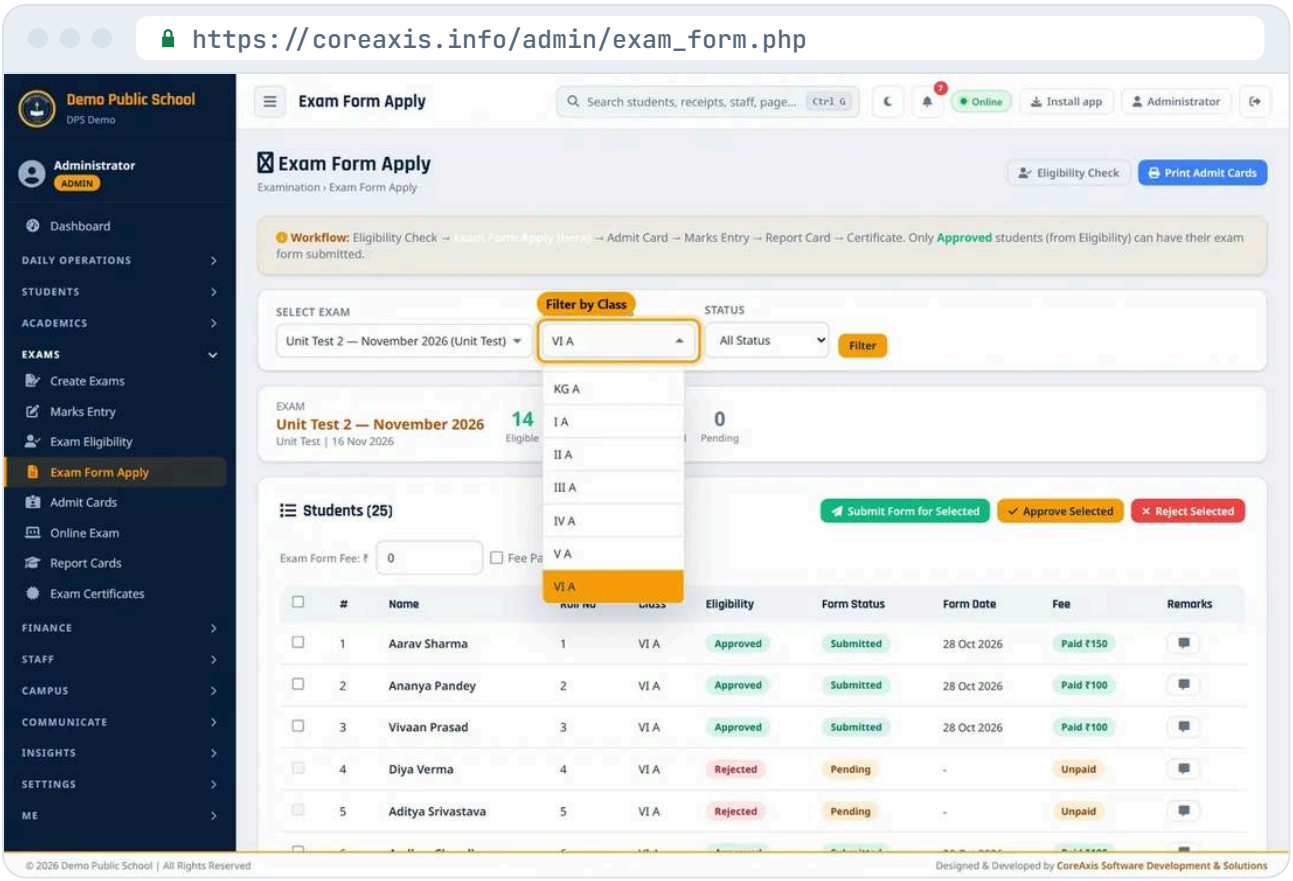
Submit exam forms (example: Unit Test 2, Class VI, form fee ₹100 paid)

1. Open **Exams › Exam Form Apply** and pick **Unit Test 2 — November 2026 (Unit Test)** in **Select Exam**.

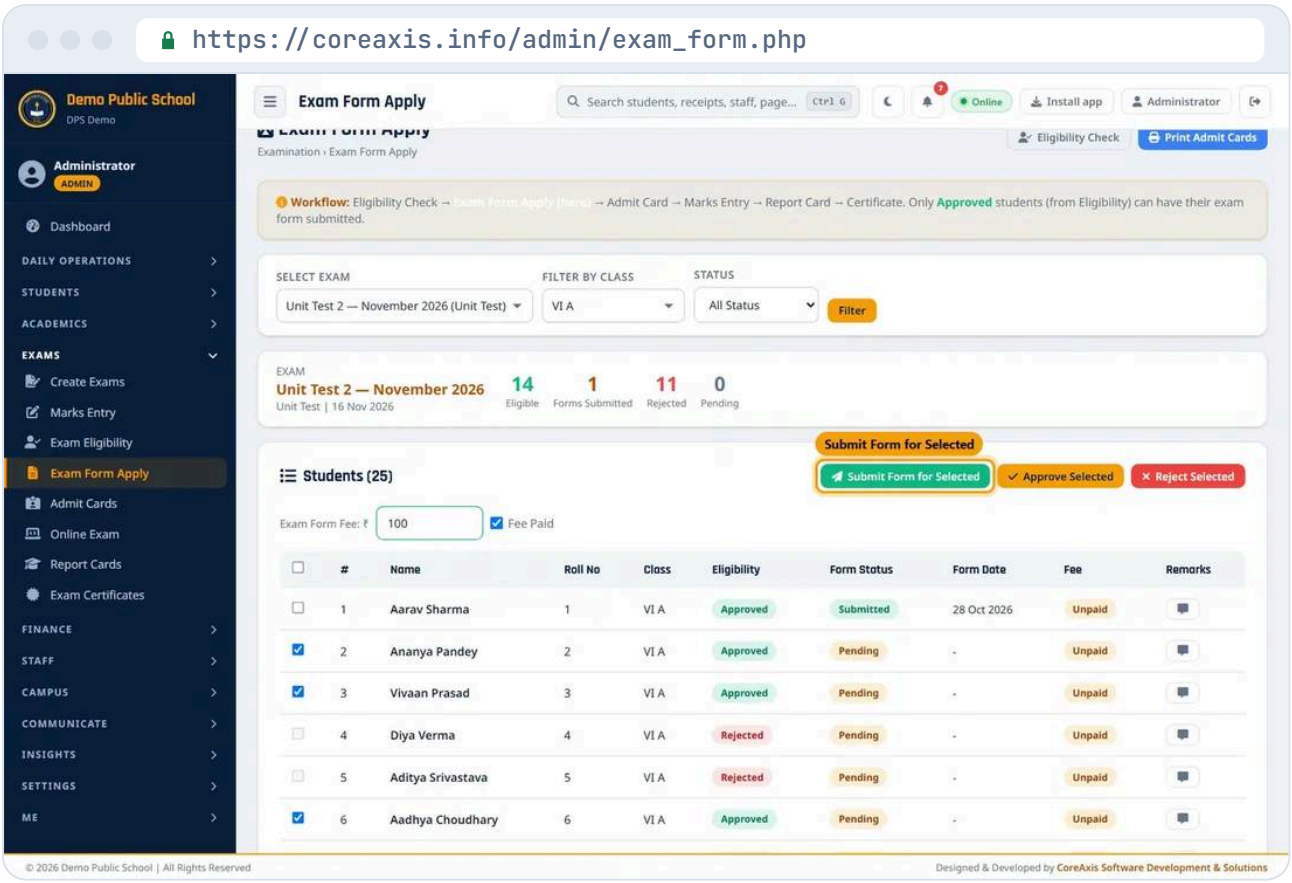


Choose the exam and the class. Classes are listed in school order.

2. Pick **VI A** in **Filter by Class** and click **Filter**. The list shows 25 students: 14 Approved and 11 Rejected.

3. Tick the students whose form you are submitting. Rejected students cannot be submitted, so tick only Approved ones (Aarav Sharma's form was already submitted by Force Apply).

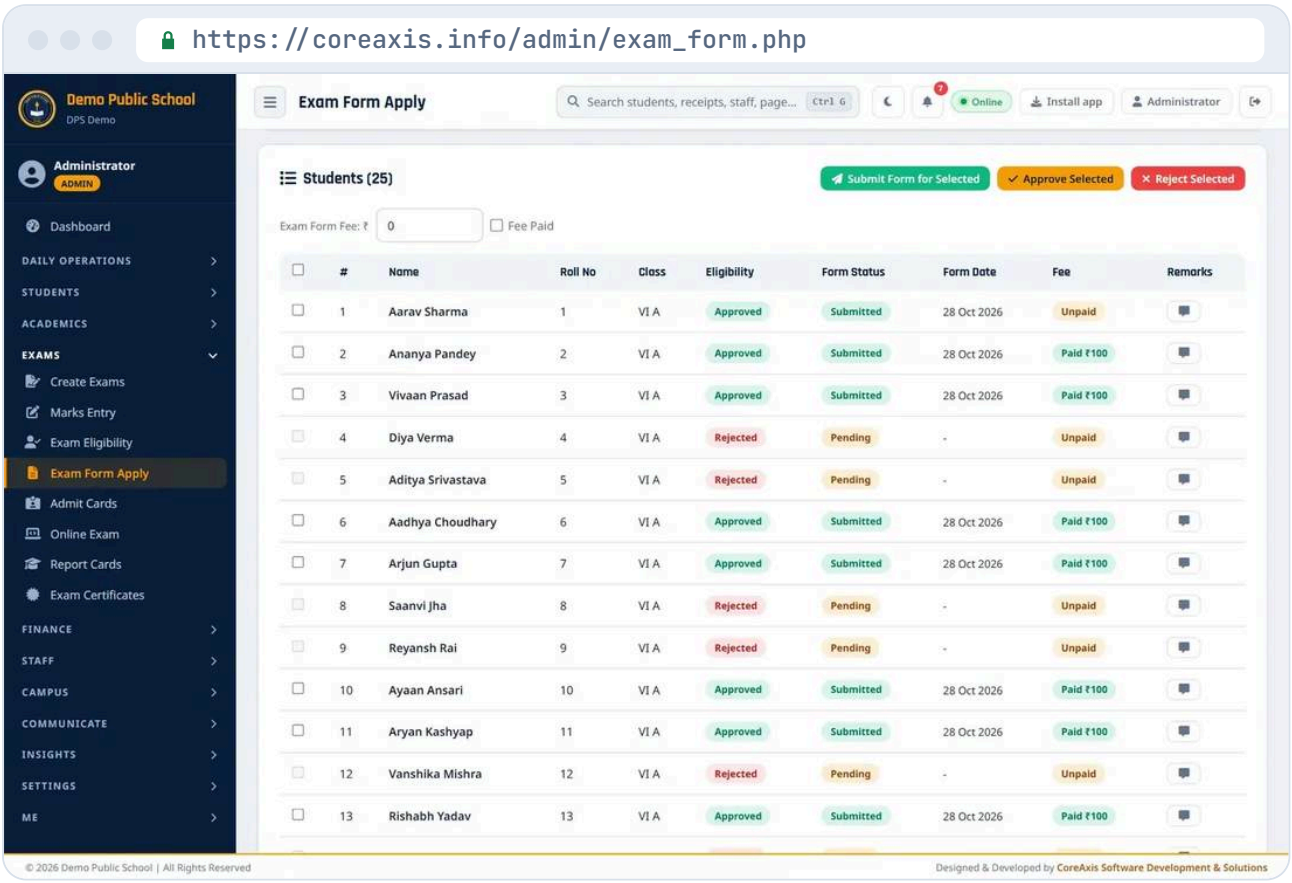
4 Enter **100** in **Exam Form Fee: ₹** and tick **Fee Paid** if the fee has been collected in cash at the counter.



Approved students ticked, fee ₹100 paid.

5 Click **Submit Form for Selected** and **Confirm**. The message confirms the forms, the ₹100 exam fee added to each student's fee account and, because Fee Paid was ticked, the Cash receipts made.

6 Check the list: **Form Status** is Submitted, **Form Date** is 28 Oct 2026 and **Fee** shows Paid ₹100.



Forms submitted.

TIP The exam form fee is posted to the student's fee account as an "Exam Form Fee" charge. With **Fee Paid** ticked, a Cash receipt is made at once (it appears in Recent Collections and the Cash Book). Without it, the fee stays due and is collected at the Fee Desk like any other charge.

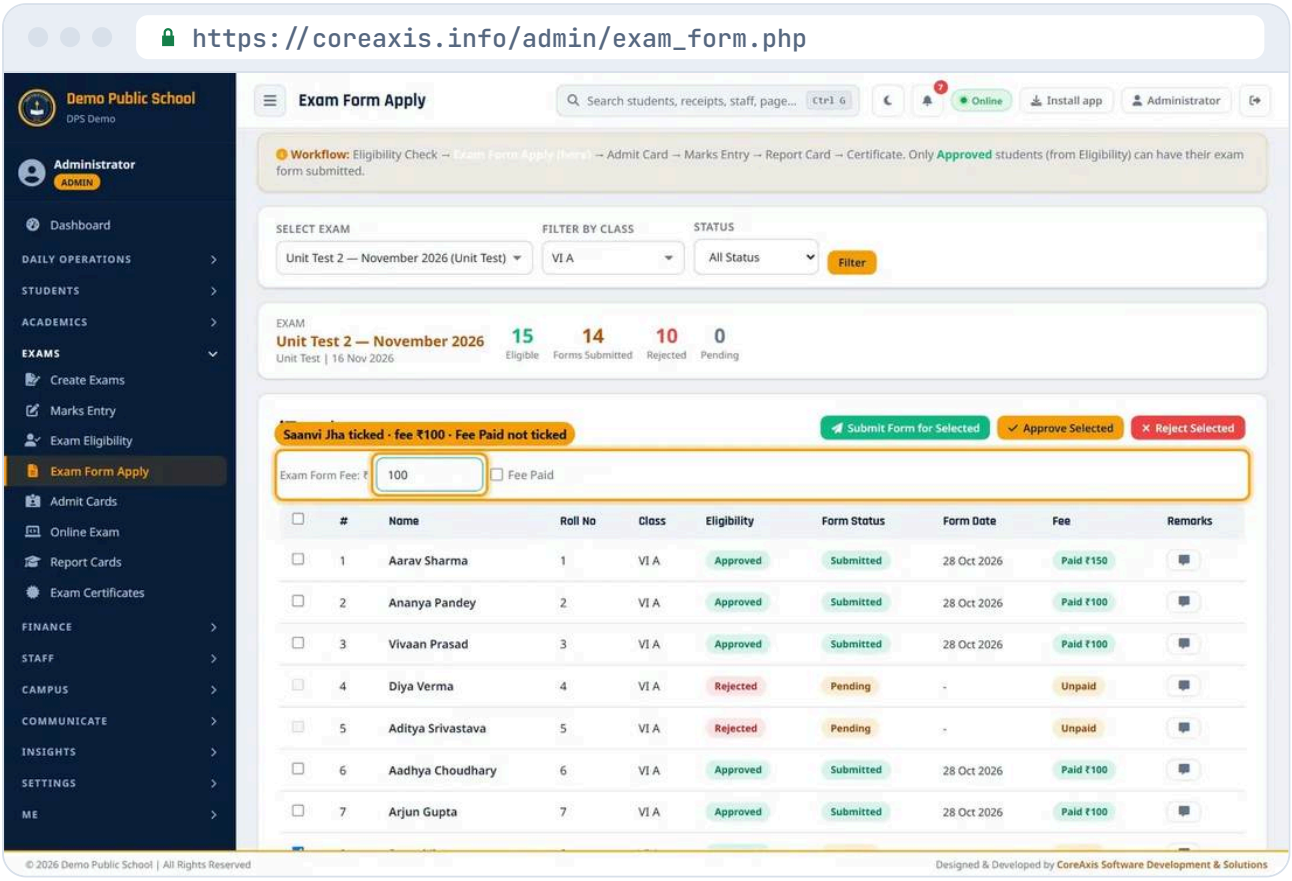
TIP Approve Selected / Reject Selected change the eligibility of ticked students without going back to Exam Eligibility. Reject asks to confirm.

Submit a form when the fee is not yet paid (example: Saanvi Jha, ₹100 due)

Saanvi Jha was first Rejected for fee dues. The Principal set her to Approved (Eligible) in Exam Eligibility › Edit Status. Her father will pay the exam fee at the counter later.

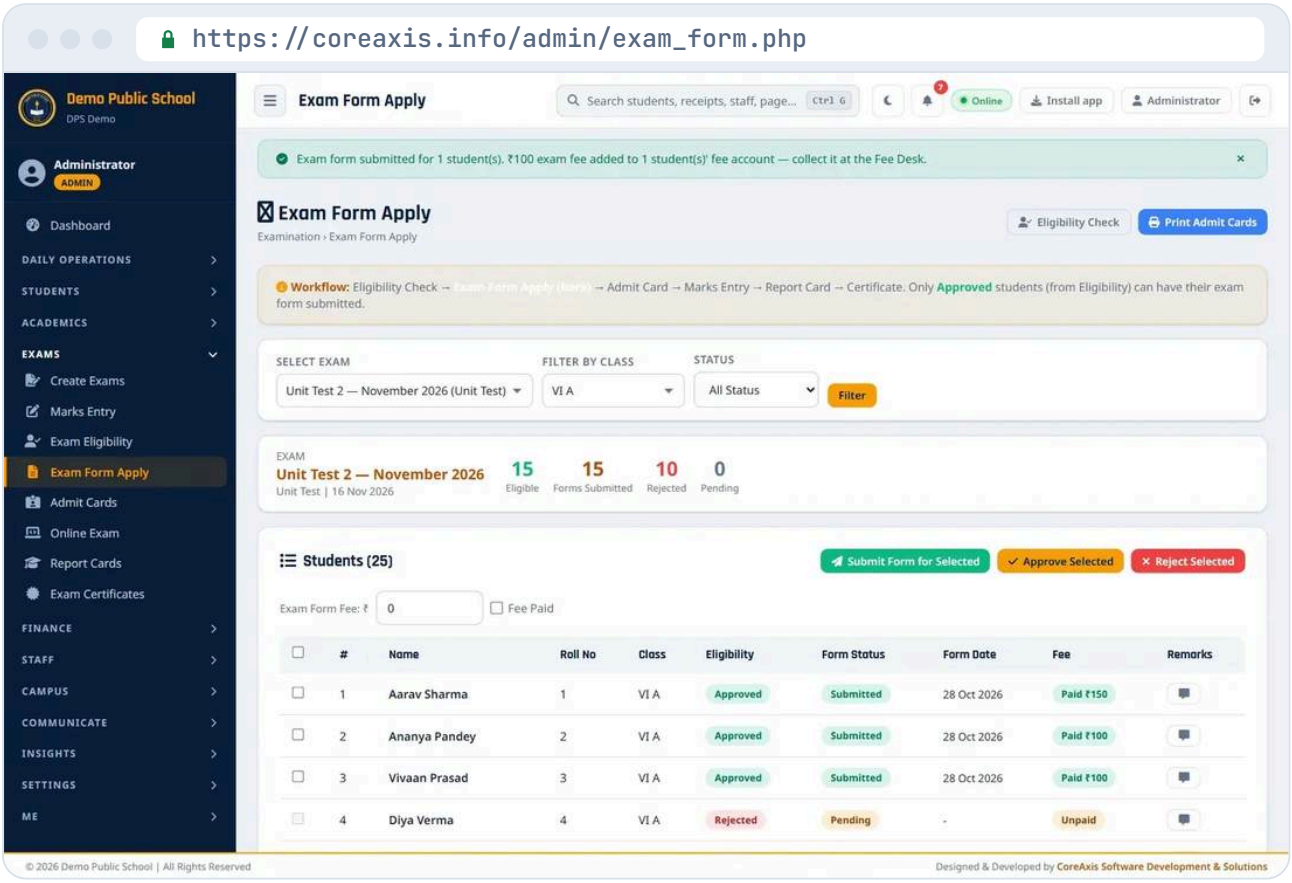
1 Pick the exam and **VI A**, then click **Filter**. Saanvi Jha's tick box is now active.

2 Tick **Saanvi Jha**, enter **100** in **Exam Form Fee: ₹** and leave **Fee Paid** unticked.



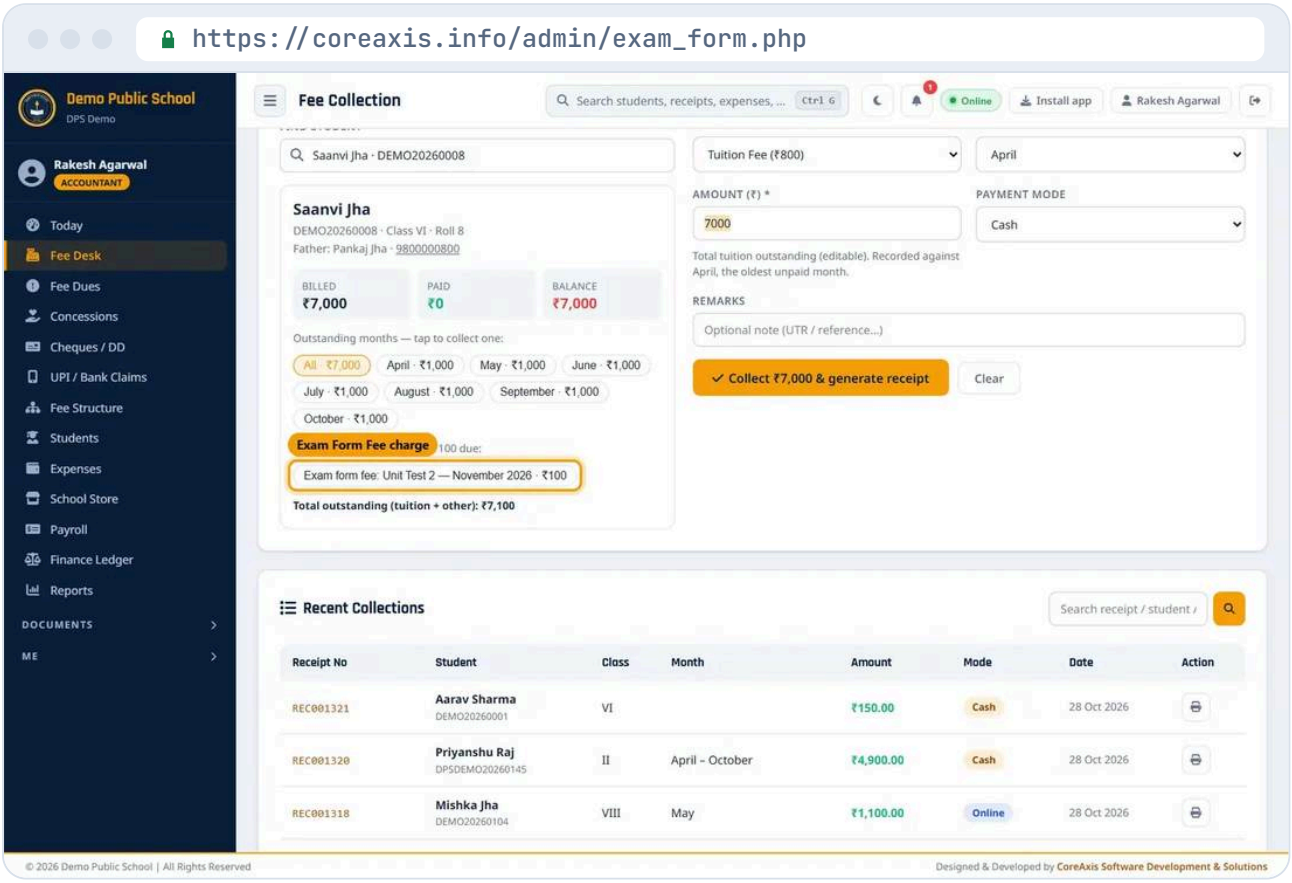
Fee ₹100, Fee Paid not ticked.

3 Click **Submit Form for Selected** and **Confirm**. The message reads "Exam form submitted for 1 student(s). ₹100 exam fee added to 1 student(s)' fee account — collect it at the Fee Desk."



The fee is now due in Saanvi's fee account; her row shows Unpaid.

4 When her father pays, open **Fee Desk**, search **Saanvi Jha** and collect the **Exam Form Fee** charge listed under **Other charges & late fee**. See the Fee Desk chapter.



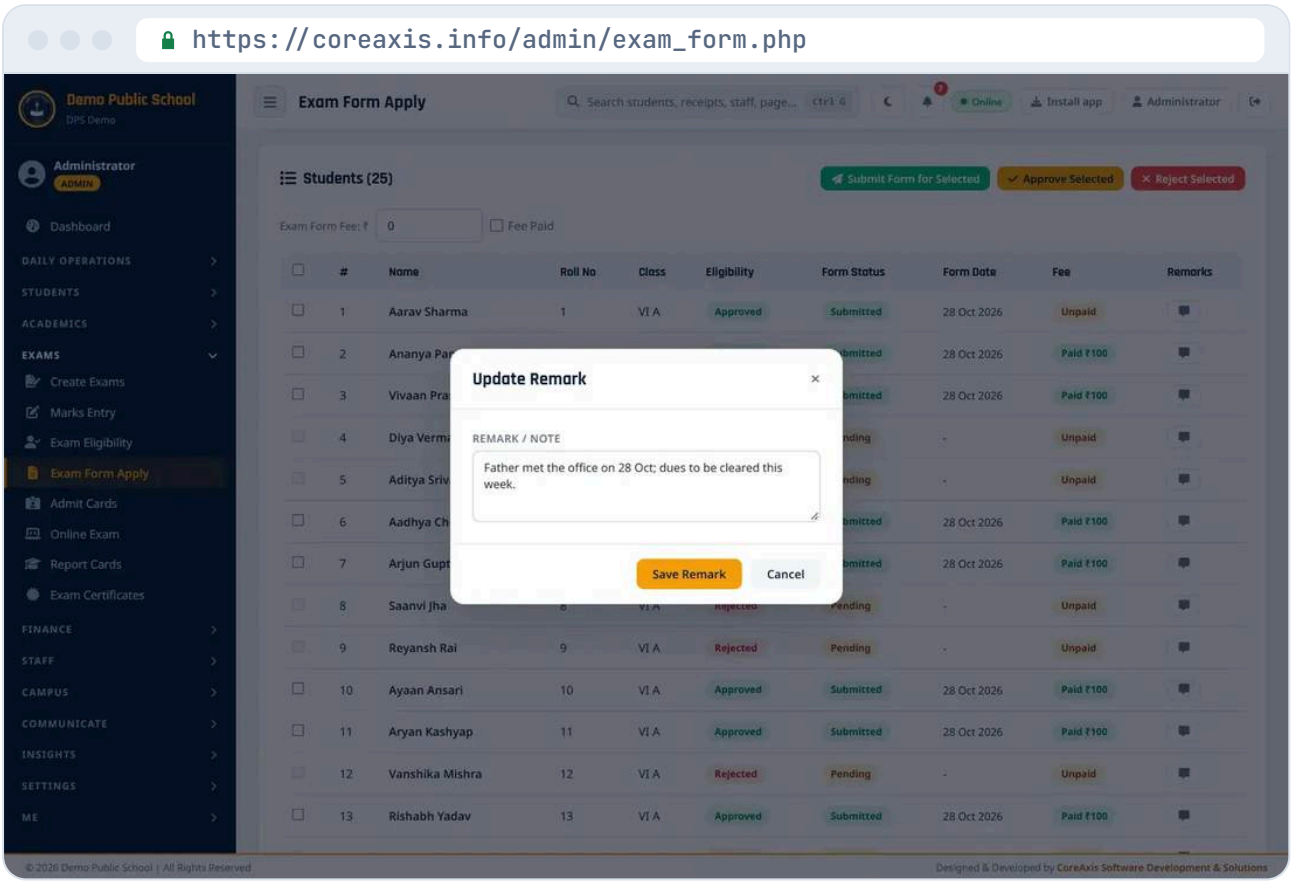
The Exam Form Fee charge on Saanvi Jha's Fee Desk card.

TIP The charge is added only once per student and exam. Submitting the same student again does not bill the fee twice.

Add a remark for a student

1 Click the speech-bubble button in the student's **Remarks** column (example: Diya Verma).

2 Type the note in **Remark / Note**, for example: Father met the office on 28 Oct; dues to be cleared this week.



Remark for Diya Verma.

3 Click **Save Remark**. The message "Remark updated." appears.

Questions

The tick box of a student is greyed out.

The student is not Approved in Exam Eligibility. Approve them there (or with Approve Selected here), or use Force Apply.

Do students apply for the exam themselves?

No. The office submits the forms here on the students' behalf.

Why does the admit card list not show a student?

Once forms are submitted for an exam, admit cards are printed only for students whose form is submitted. Submit that student's form here.

Where does the exam form fee go?

Into the student's fee account as an "Exam Form Fee" charge. It shows at the Fee Desk, in Fee Dues and on the receipt when collected. Ticking Fee Paid when you submit the form makes a Cash receipt at once.

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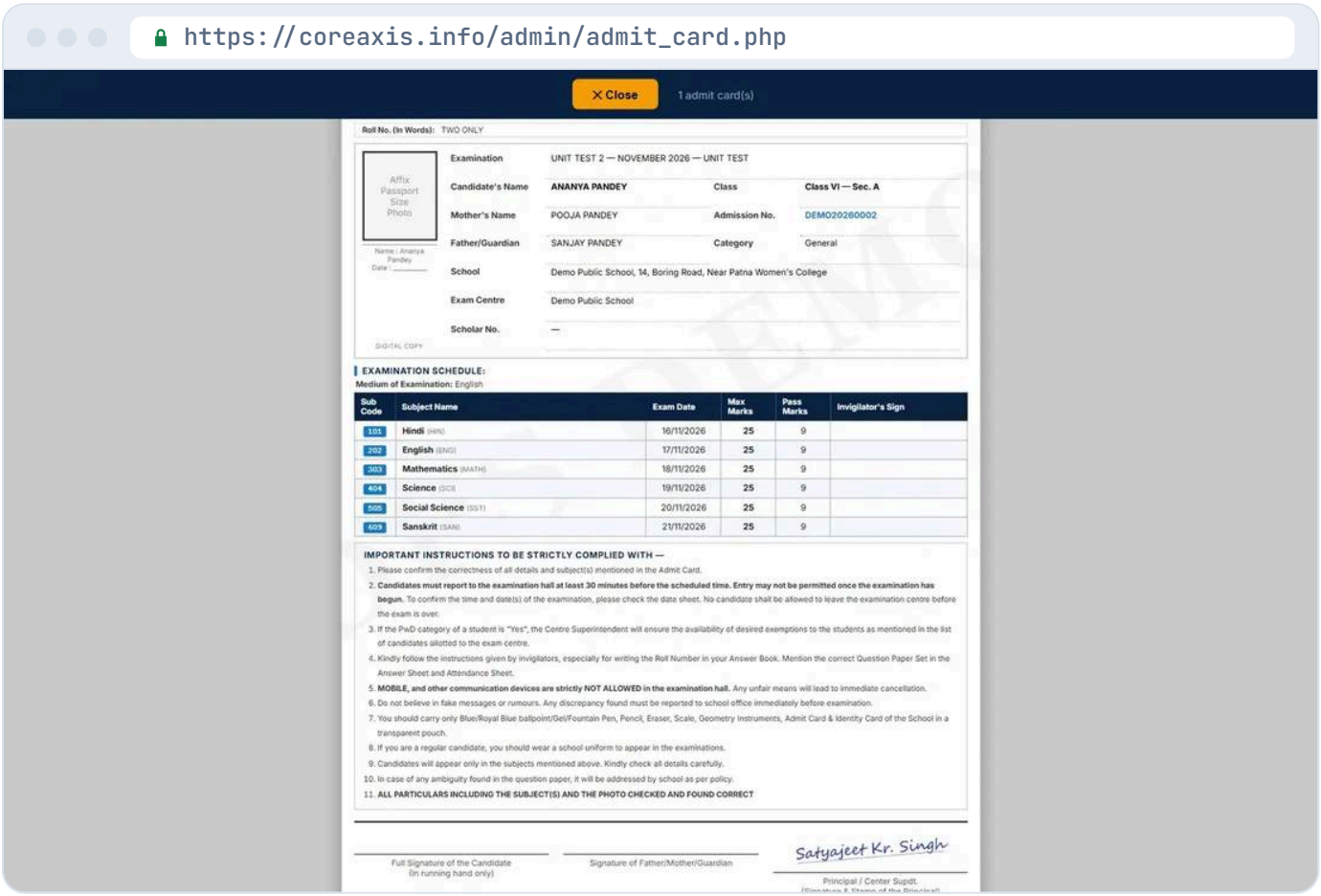
EXAMS · CHAPTER 20

Admit Cards

Admin | Principal | Teacher (own class)

MENU Exams › Admit Cards

The Admit Card Generator prints admit cards for the eligible students of a class, with the school header, student details, photo box and the exam's subject-wise schedule. The first print of each card is registered in the Document Register as the ORIGINAL; later prints are marked DUPLICATE COPY. Opening the cards without issuing them shows a DIGITAL COPY preview.



Admit Cards — Demo Public School

Screen at a glance

Class *	Required. The class whose admit cards you print.
Select Exam (for schedule)	The exam whose subjects, dates and marks print on the card. — No Exam / General — prints cards for every active student without an exam schedule.

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Template	Detailed (full page) or Simple tabular (2 per A4).
Single Student (optional)	Leave as All Students in Class, or pick one student.
Generate & Print Admit Cards	Opens the cards in a new tab.
Preview	Reloads the page with your choices so you can check the student list.
Student list	Roll No, Admission No, Student Name, Father and a Print button for one card.
Rules / Before Printing	Reminders: assign subjects in Exams first, give students roll numbers, print on A4 portrait with 10 mm margins.

Print admit cards for a class (example: Unit Test 2, Class VI)

Before you start: the exam's subjects and dates are set (Create Exams), the class has been checked in Exam Eligibility, and forms are submitted (Exam Form Apply).

1. Open **Exams › Admit Cards**.
2. Pick **Class VI** in **Class** and **Unit Test 2 — November 2026 (Class VI)** in **Select Exam**.

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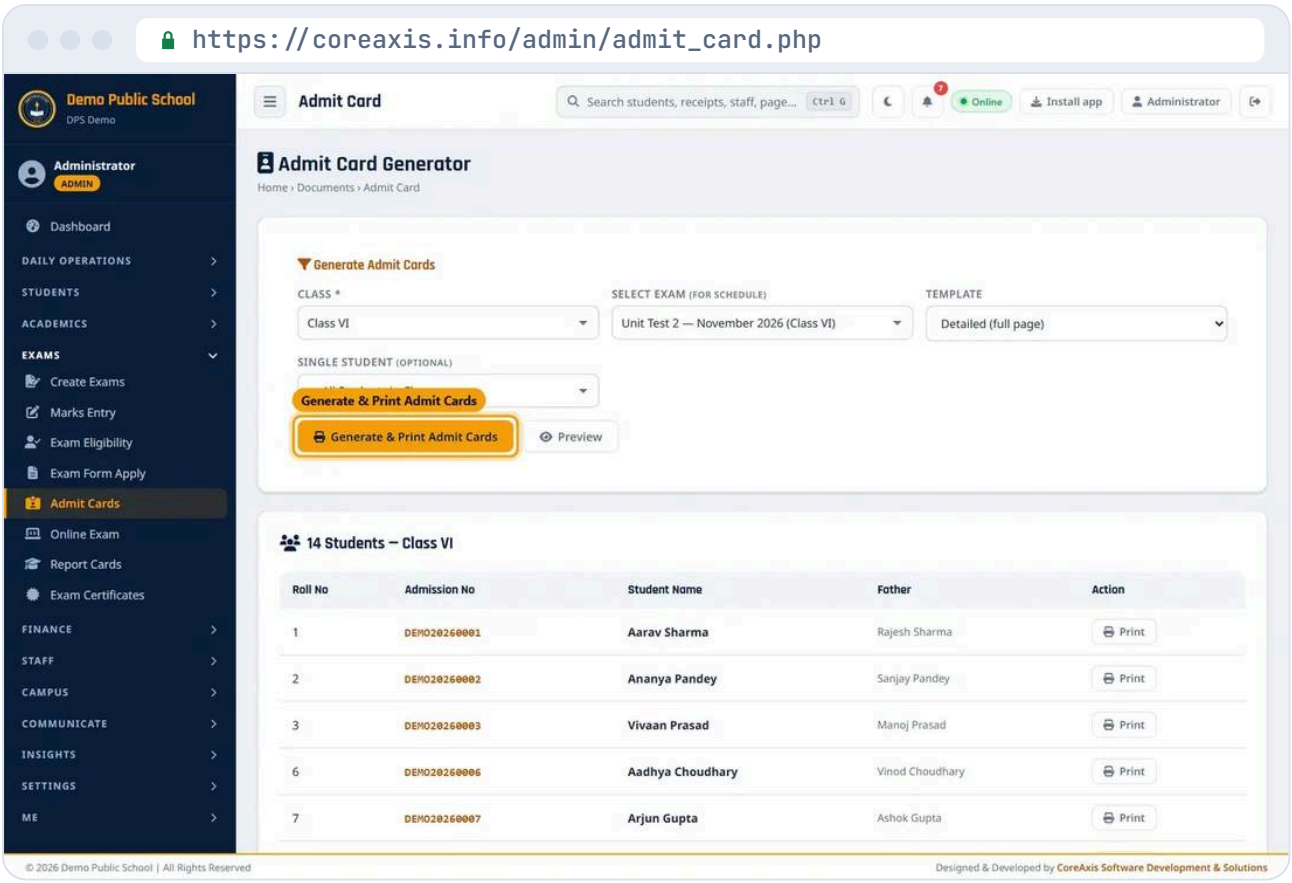
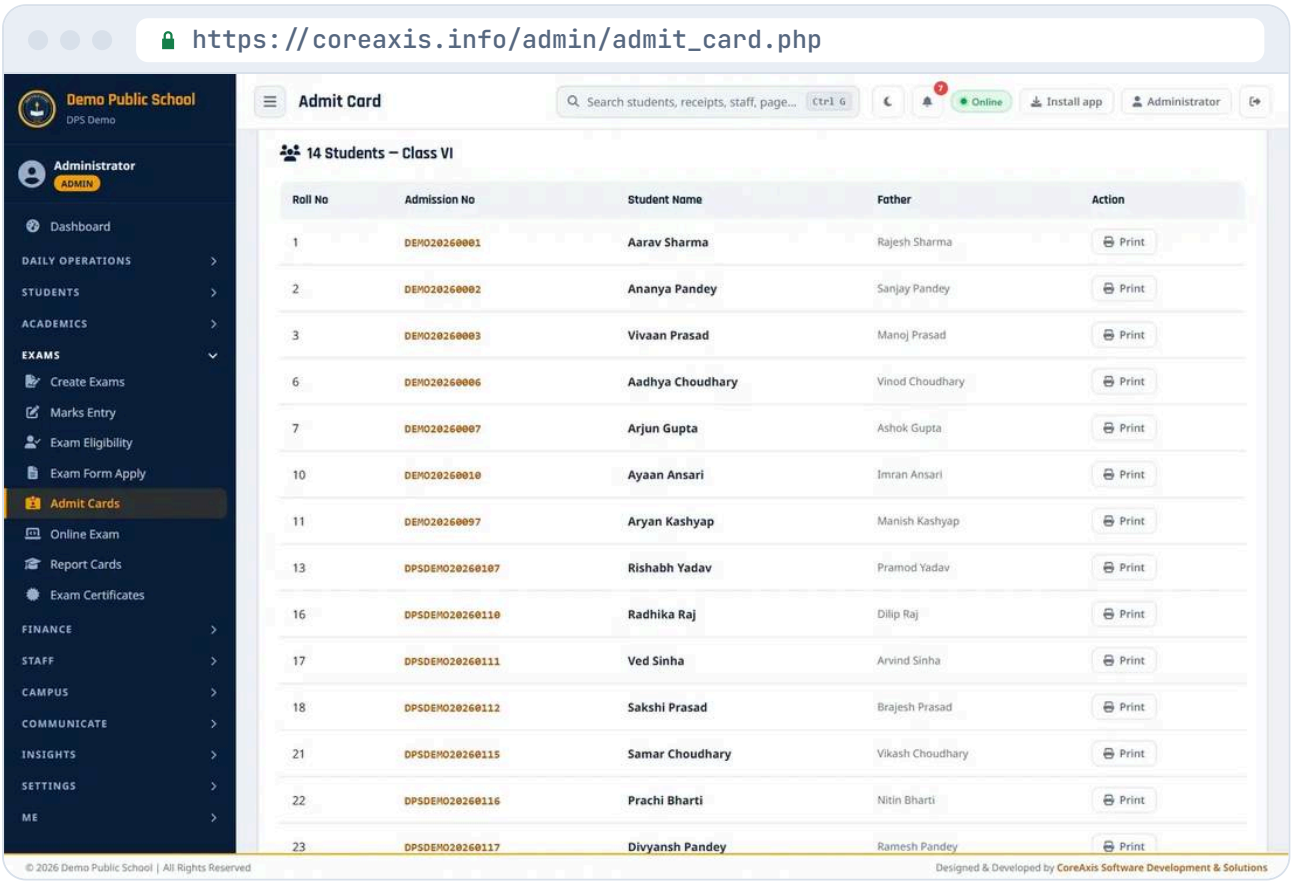
3 Keep **Detailed (full page)** in **Template** and **All Students in Class** in **Single Student**.



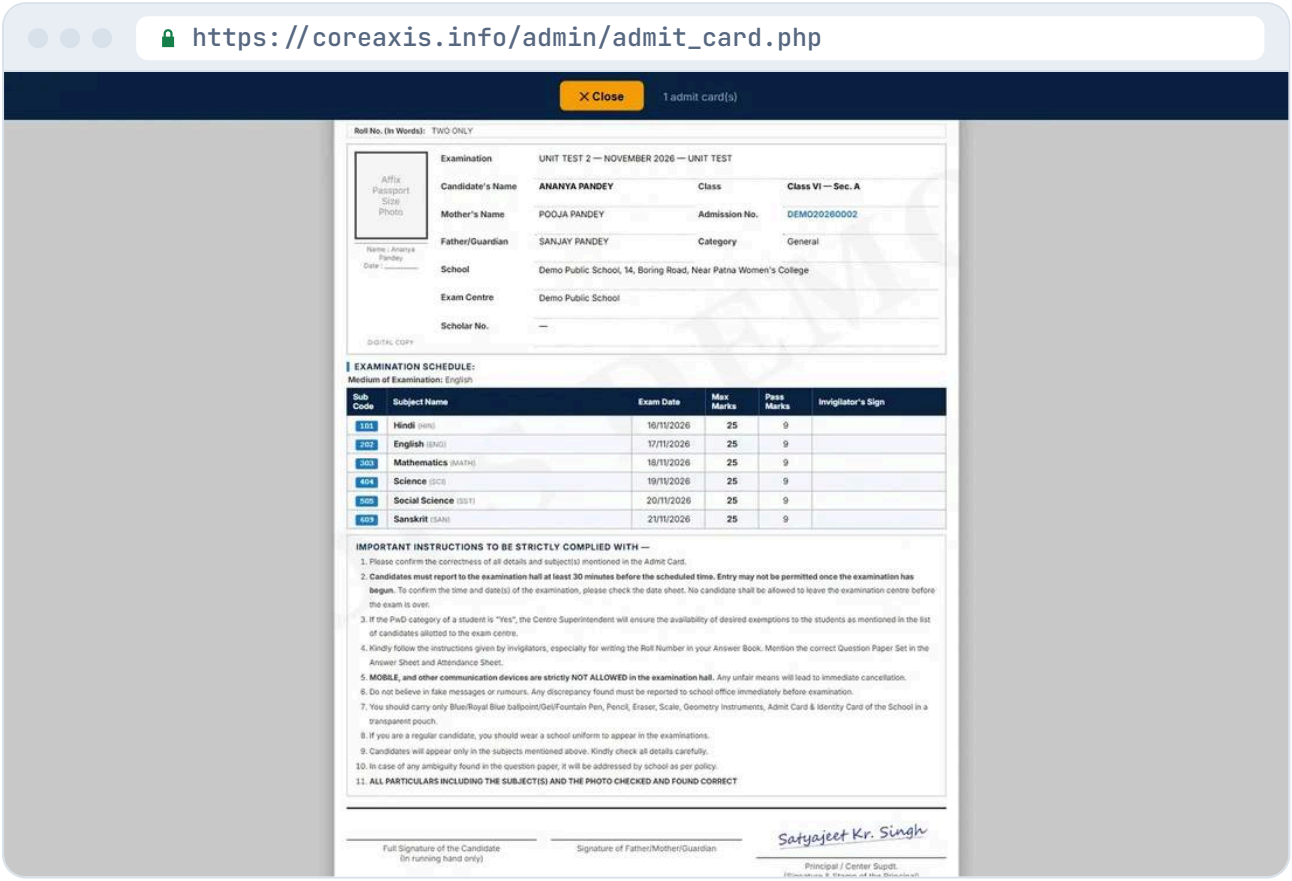
The generator with class, exam and template chosen.

4 Click **Preview** and check the list: 14 students — the approved students whose exam form is submitted.



Only eligible students are listed.

5 Click **Generate & Print Admit Cards**. The cards open in a new tab as a **DIGITAL COPY (preview)**. Check the names, roll numbers and schedule.



Preview of Ananya Pandey's admit card. The schedule lists only the exam's six subjects with their dates and marks.

6 Click **Issue & Print** in the dark bar. The cards are registered as ORIGINAL and the browser's print window opens. Print on A4.

TIP To print one card, click **Print** in that student's row, or pick the student in **Single Student**.

TIP Printing the same card again prints it as DUPLICATE COPY – 2, 3 … Every issue is listed in the Document Register (Open Document Register in the dark bar).

TIP Roll numbers must be set in the student profiles; the roll number also prints in words (for example TWO ONLY).

TIP The EXAMINATION SCHEDULE prints only the subjects ticked for the exam in Create Exams › Assign Subjects, with the dates, maximum and pass marks set there. If a subject or date is wrong, correct it there and generate the cards again.

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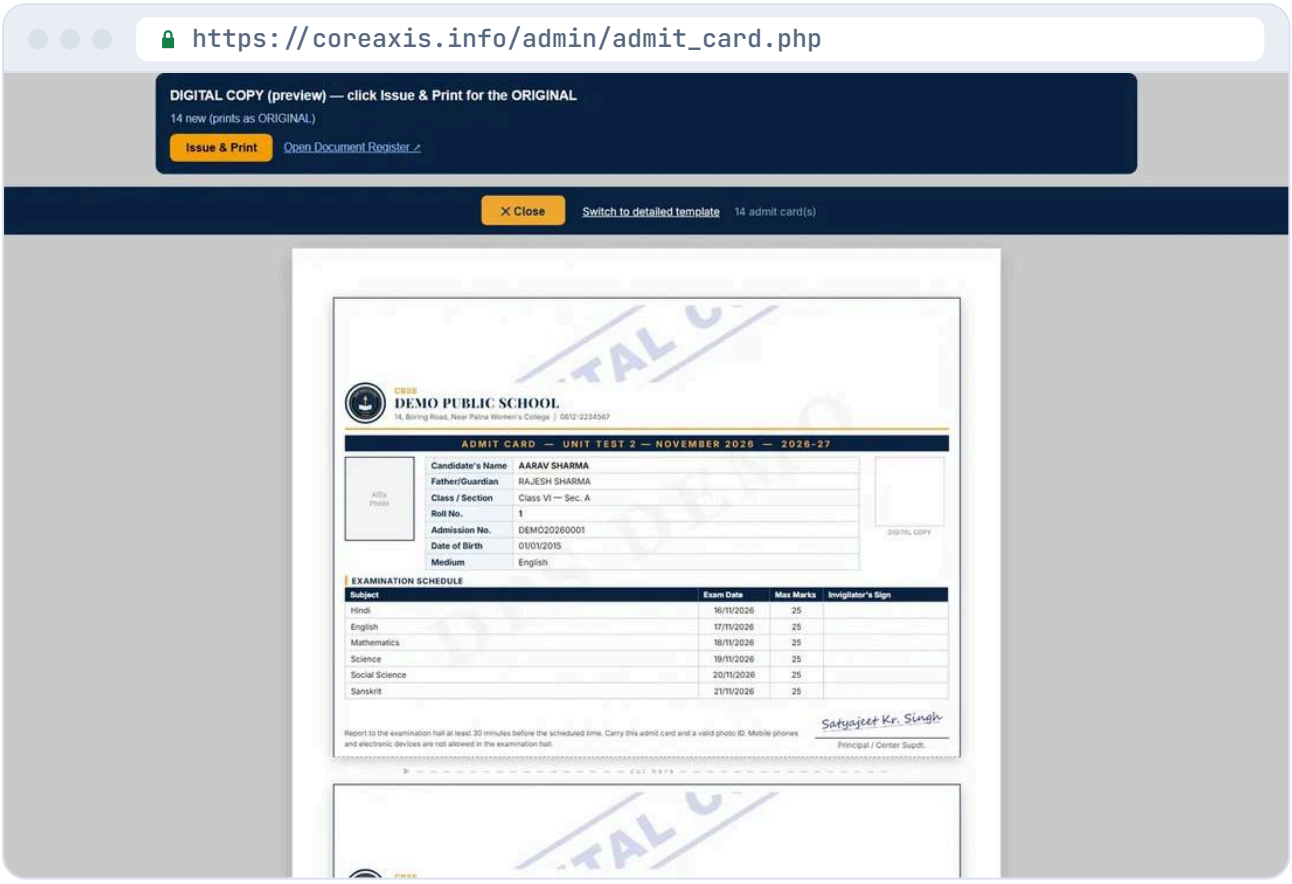
Print two cards per page

1. Choose **Simple tabular (2 per A4)** in **Template** and click **Generate & Print Admit Cards**.

2. Each card shows the student table and a compact schedule, with a cut line between the two cards.



Simple tabular template: Unit Test 2's six subjects, 25 marks each.

3. Use **Switch to detailed template** in the top bar to go back.

Questions

The student list is empty after I choose the exam.

No student of that class is Approved for the exam yet. Run Auto-Check in Exam Eligibility (and submit forms in Exam Form Apply), or choose — No Exam / General — to print cards for all students.

A student lost the admit card. Can I print it again?

Yes. Print it for that student; it prints as DUPLICATE COPY and the reprint is recorded in the Document Register.

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Can teachers print admit cards?

Yes, for their own class, from Cards & Certificates › Admit Cards in their menu.

A subject is missing from (or extra on) the schedule.

The schedule shows exactly the subjects assigned to the exam. Open Exams › Create Exams, click Subjects in the exam's row, tick or untick the subject, save, and generate the cards again.

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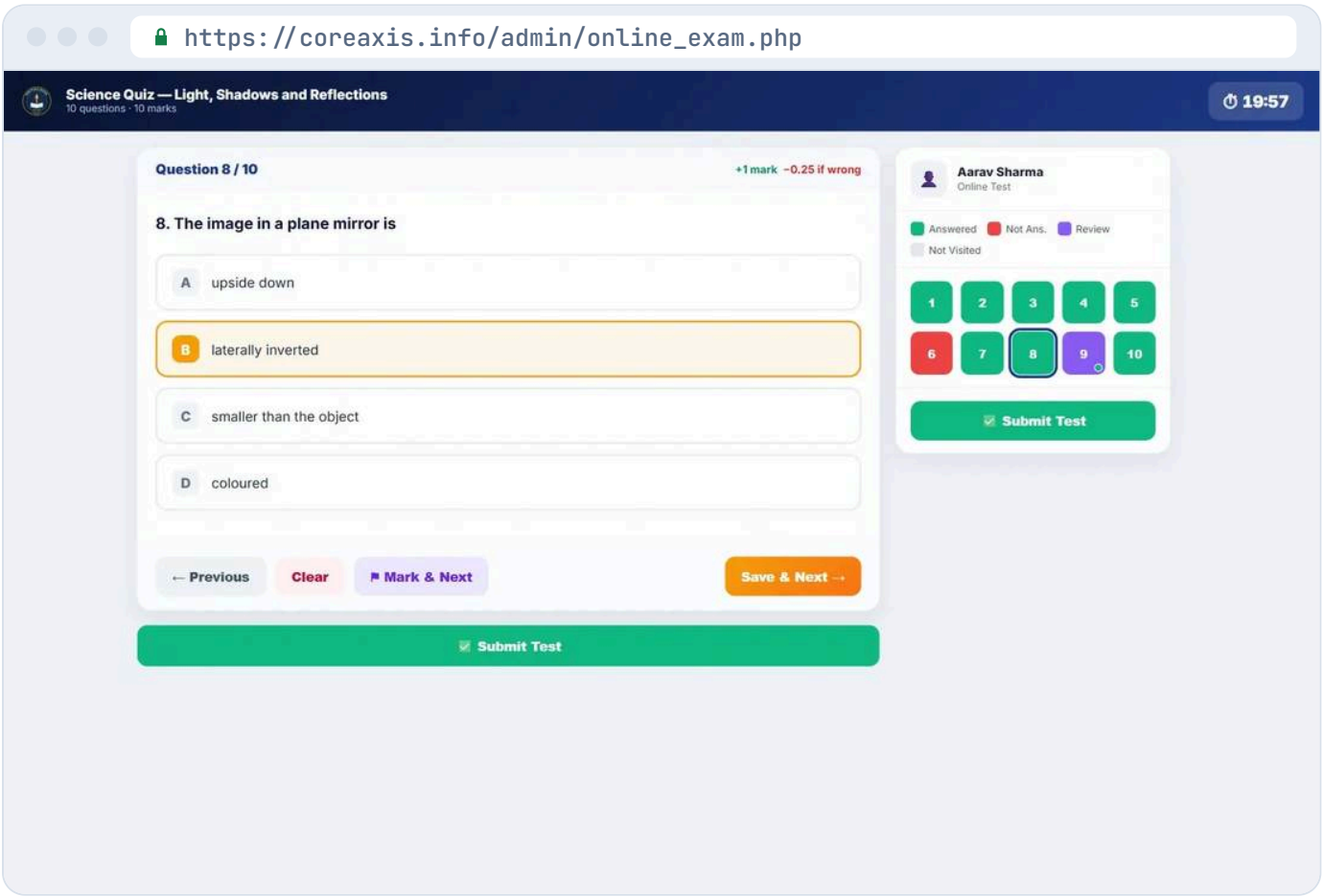
EXAMS · CHAPTER 21

Online Exam

Admin | Principal | Teacher (when allowed) MENU Exams › Online Exam

Online Exam runs multiple-choice tests (CBT) in the student and parent portal and the mobile app. You set the class, subject, duration, pass marks, negative marking and the window when the test is open, then add questions one by one or in bulk. Students take the test on an exam screen with a question palette, Mark for Review and an auto-submit timer, and see their score as soon as they submit. Online exam scores are separate from Marks Entry and report cards.



Online Exam — Demo Public School

Screen at a glance

Create Exam	Opens the form for a new online test.

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Teacher access: OFF / ON	Allow teachers lets class teachers create, run and see results of online exams for their own classes. Turn off removes it. Only Admin / Principal see this switch.
Title	Test name, with duration and pass marks below.
Class / Subject / Qs / Marks	Who takes the test, the subject, number of questions and total marks.
Window	When the test opens and closes, or anytime.
Status	Published (students can see it) or Draft.
Attempts	How many students have started or finished it.
Actions	Questions (list icon), Results (ranking icon), Edit (pencil), Delete (bin — removes the test with all questions and attempts).

Create an online test (example: Class VI Science

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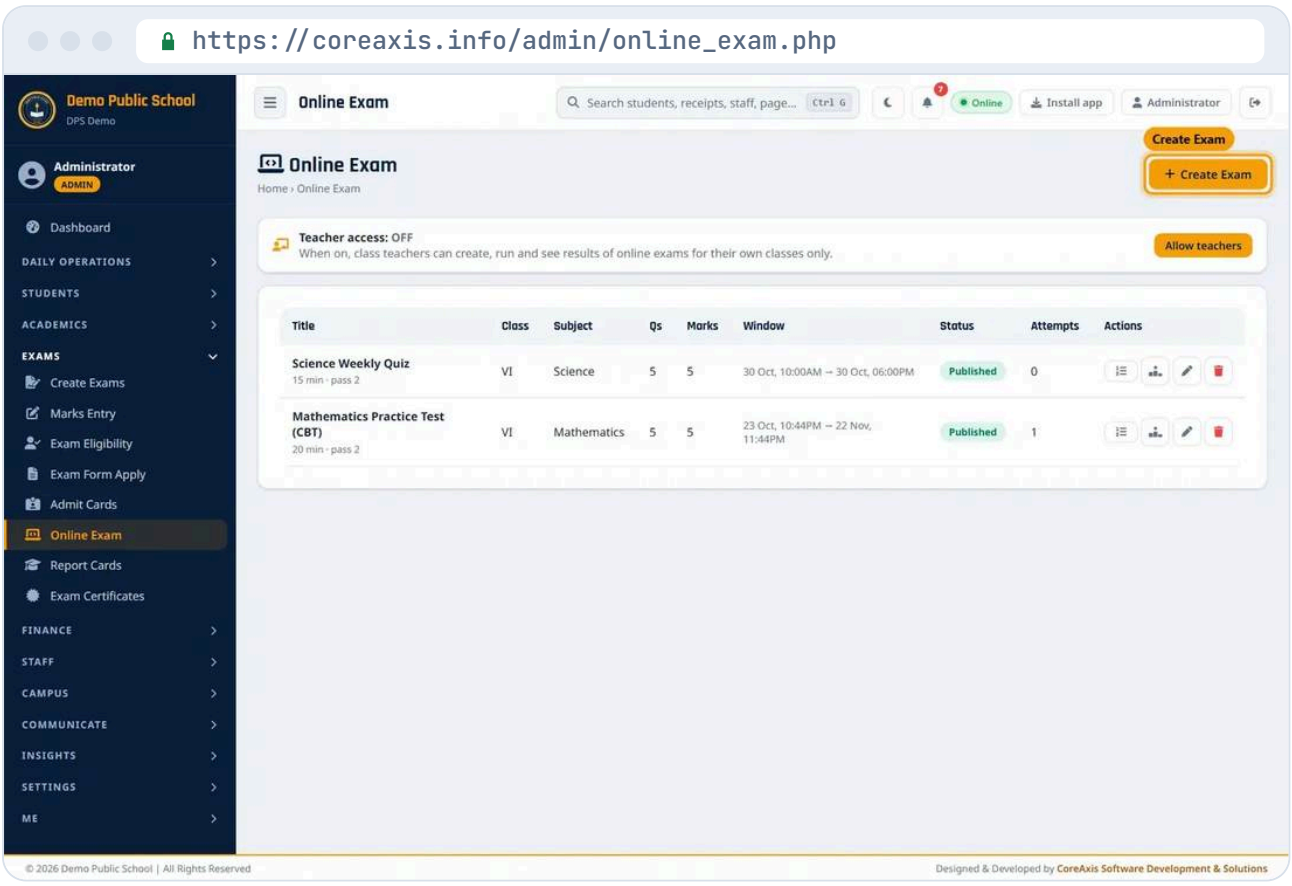
quiz, 20 minutes, −0.25 for a wrong answer)

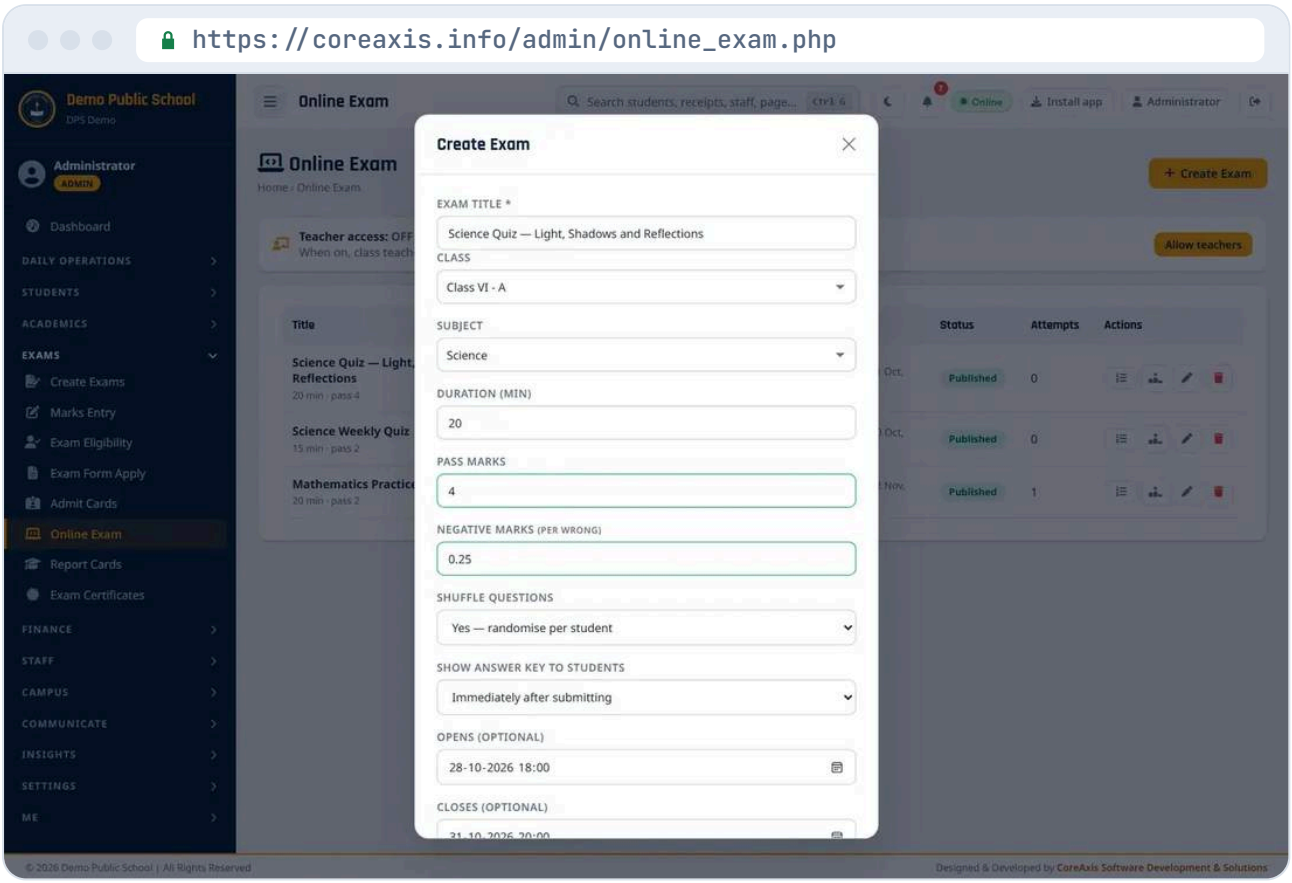
1. Open **Exams › Online Exam** and click **Create Exam**.



Online Exam list.

2. Type **Science Quiz — Light, Shadows and Reflections** in **Exam Title**.
3. Pick **Class VI - A** in **Class** and **Science** in **Subject**.

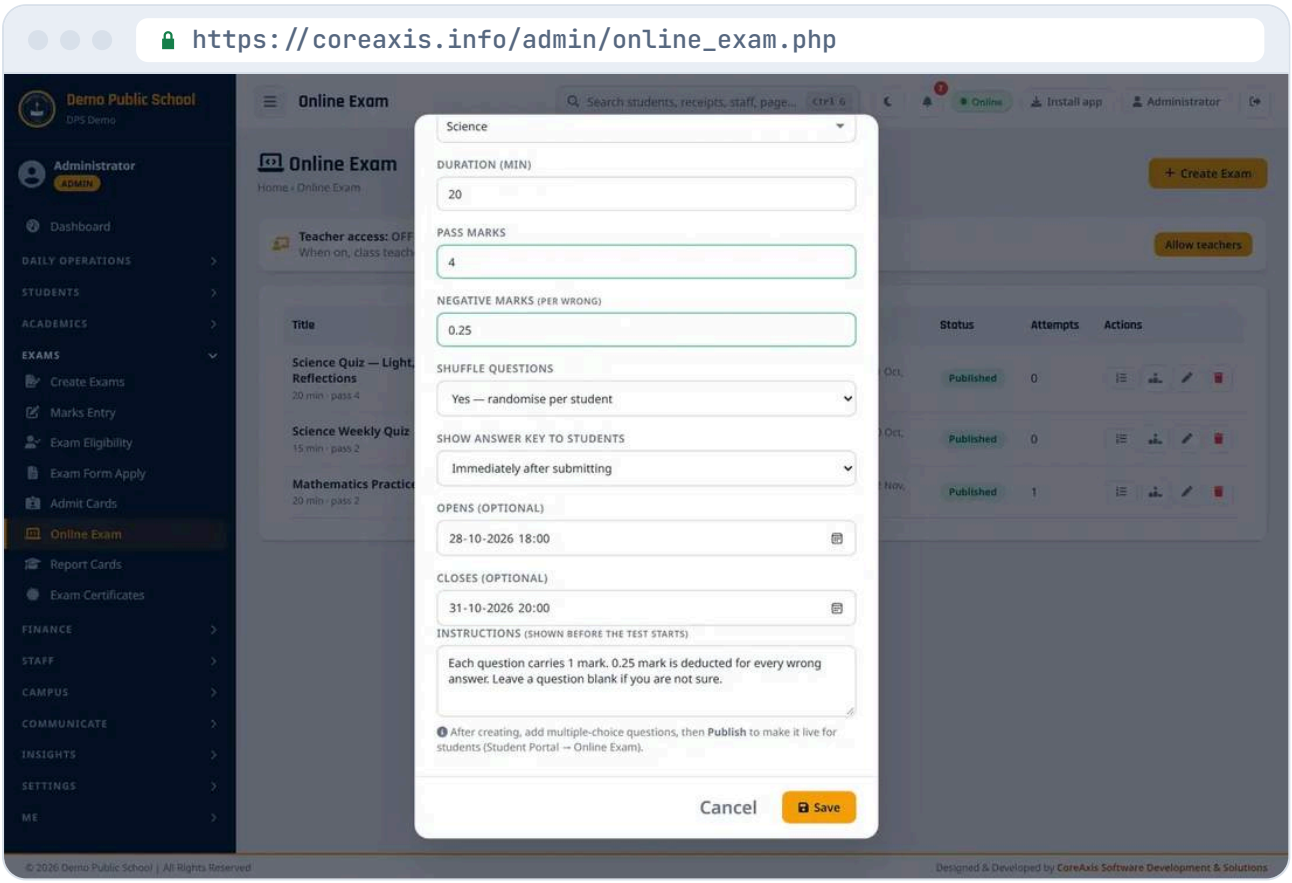
4 Enter **20** in **Duration (min)**, **4** in **Pass Marks** and **0.25** in **Negative Marks (per wrong)**.



Title, class, subject, duration, pass and negative marks.

5 Choose **Yes — randomise per student** in **Shuffle Questions** and **Immediately after submitting** in **Show answer key to students**.

6 Set **Opens** to **28-10-2026 18:00** and **Closes** to **31-10-2026 20:00**. Type the **Instructions** students read before starting.



Shuffle, answer key, test window and instructions.

7 Click **Save** and confirm. The message "Exam created — now add questions." appears and the question page opens.

TIP Show answer key: After the exam closes (recommended) stops early finishers from passing answers to classmates. Immediately shows the review as soon as a student submits. Never shows only the score.

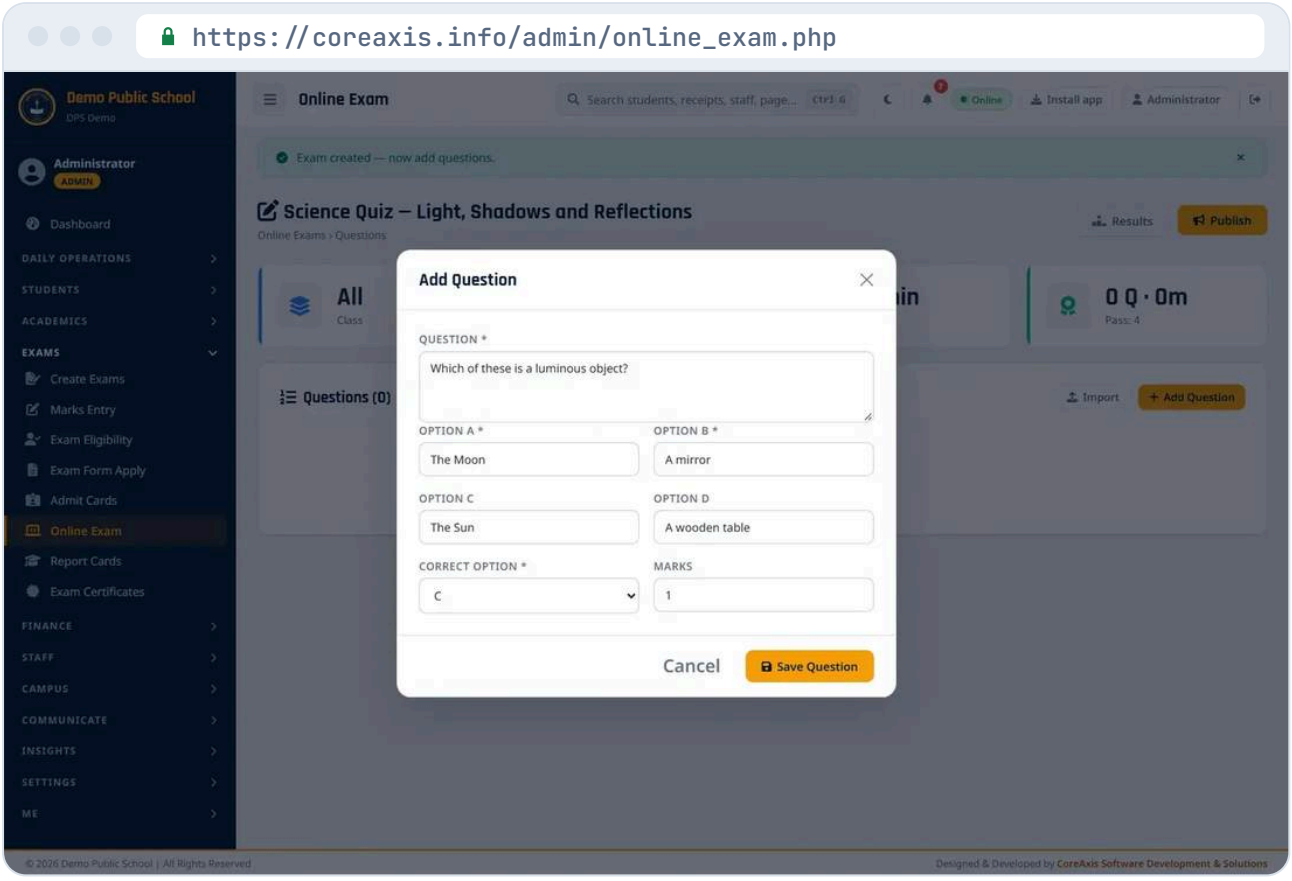
TIP Leave Opens / Closes empty for a practice test that is always open.

TIP Students see the test only after you publish it.

Add questions

1 Click **Add Question**.

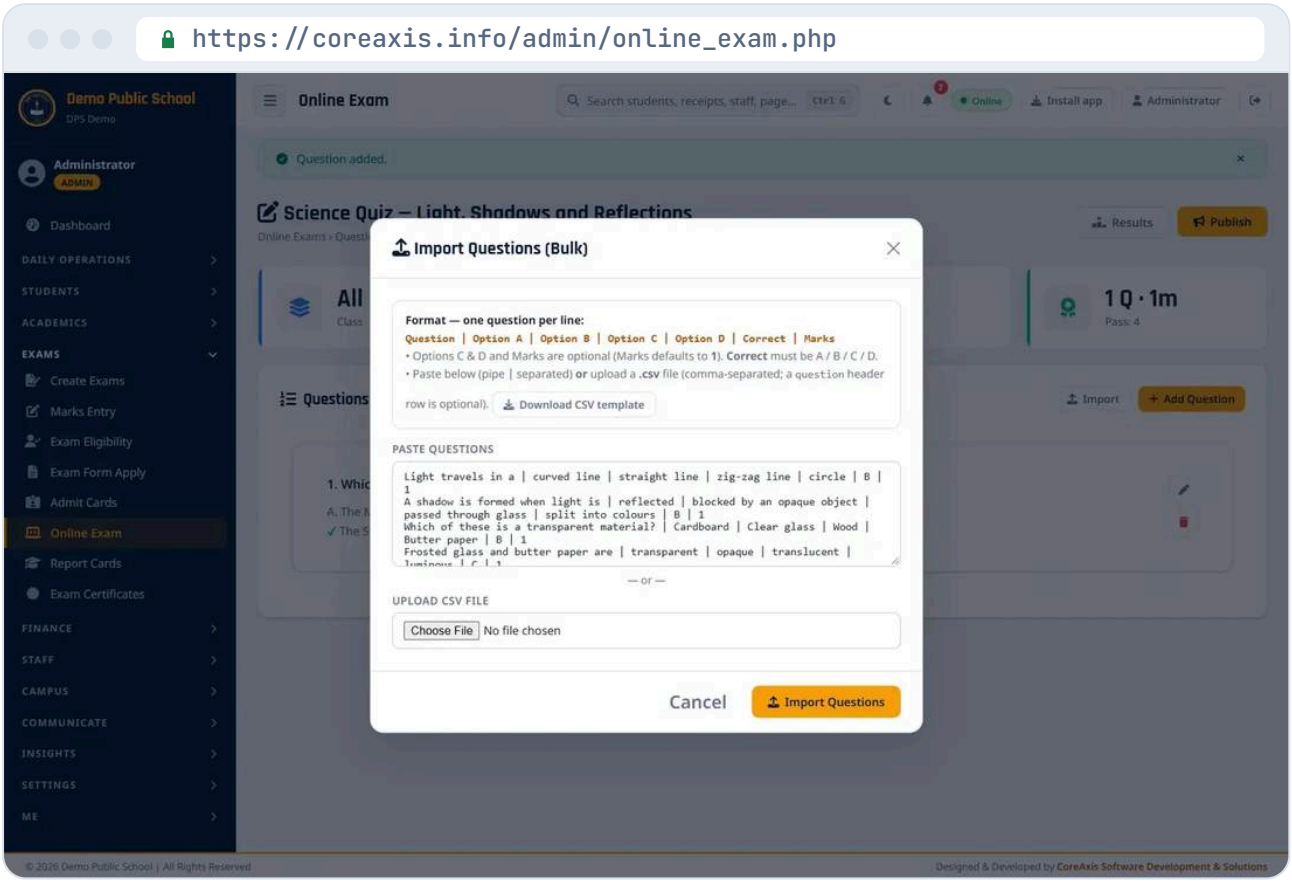
2 Type the **Question**, **Option A** to **Option D** (C and D are optional), pick the **Correct Option** and set **Marks** (1 by default). Example: Which of these is a luminous object? — A The Moon, B A mirror, C The Sun, D A wooden table; correct option C.



Adding one question.

3 Click **Save Question** and confirm. The message "Question added." appears.

4 To add many questions at once, click **Import**. Paste one question per line in the form Question | A | B | C | D | Correct letter | Marks, or upload a CSV (use **Download CSV template**).



Pasting nine questions.

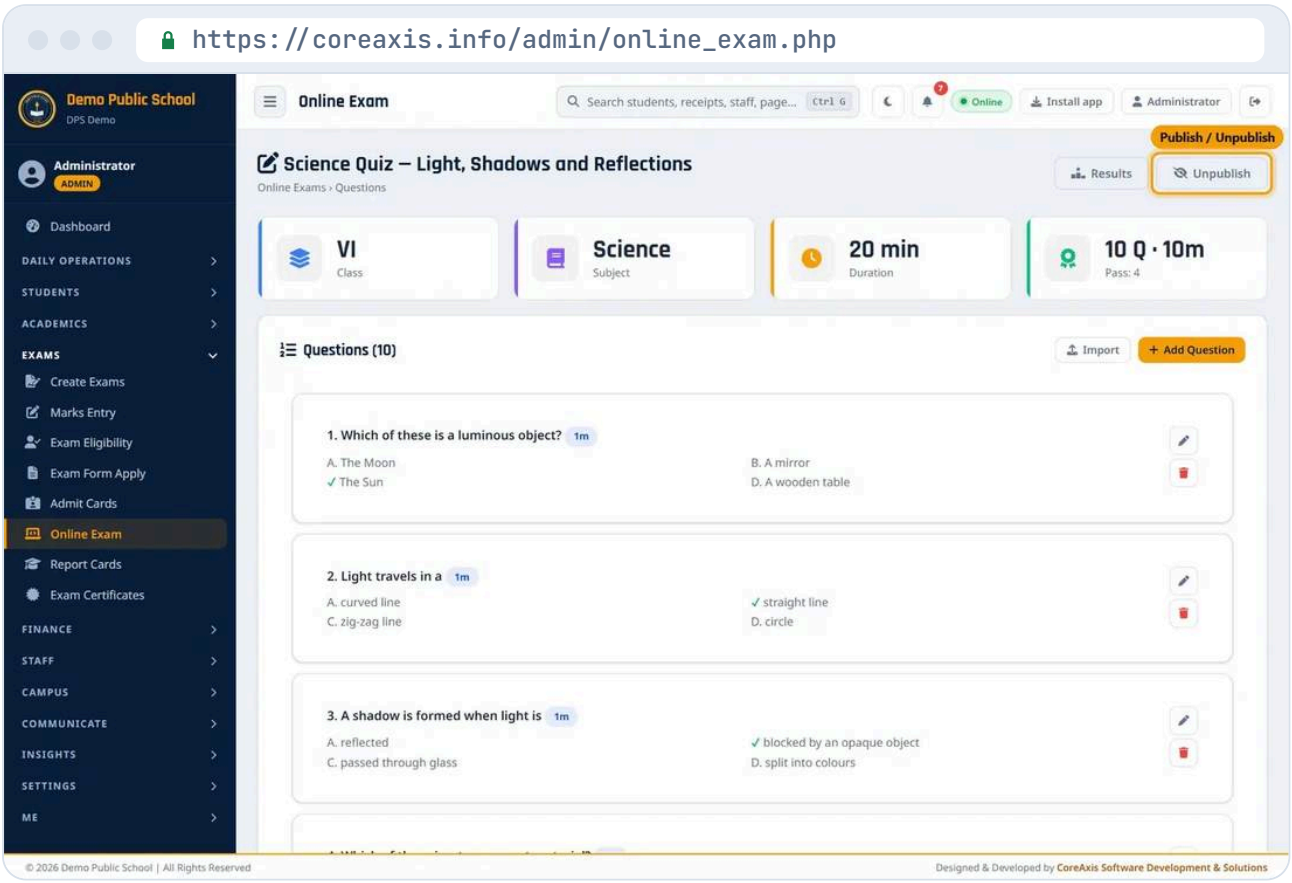
5 Click **Import Questions** and confirm. The message "9 question(s) imported." appears. Rows in the wrong format are skipped and counted.

TIP Each question card shows the correct option with a green tick. Use the pencil to correct a question and the bin to remove it.

Publish the test

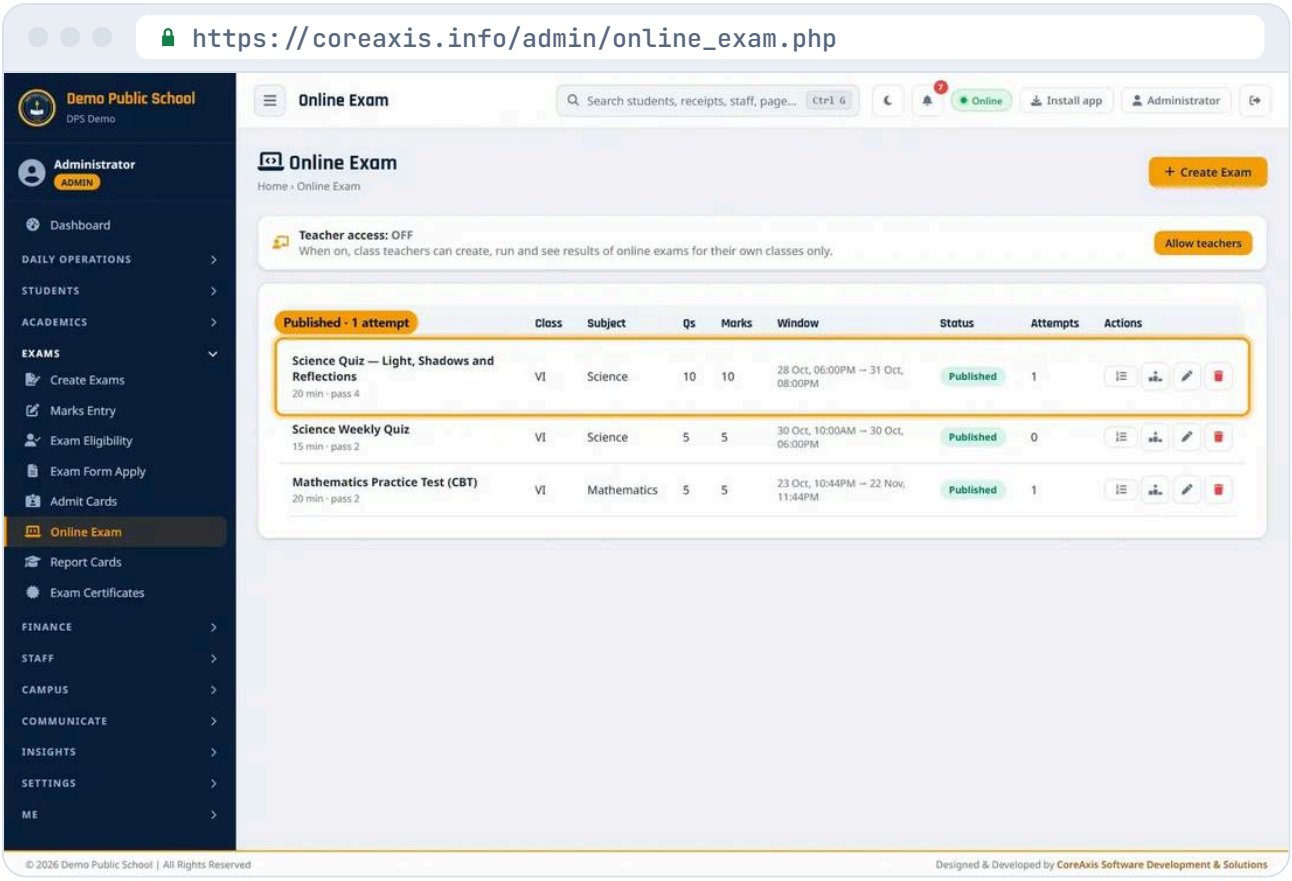
1 On the question page, check the cards at the top: class, subject, duration and 10 Q · 10m (pass 4).

2 Click **Publish** and confirm. The message "Exam published — visible to students." appears and the button changes to **Unpublish**.



The published test with its questions.

3 In the list the test shows **Published** and its window.

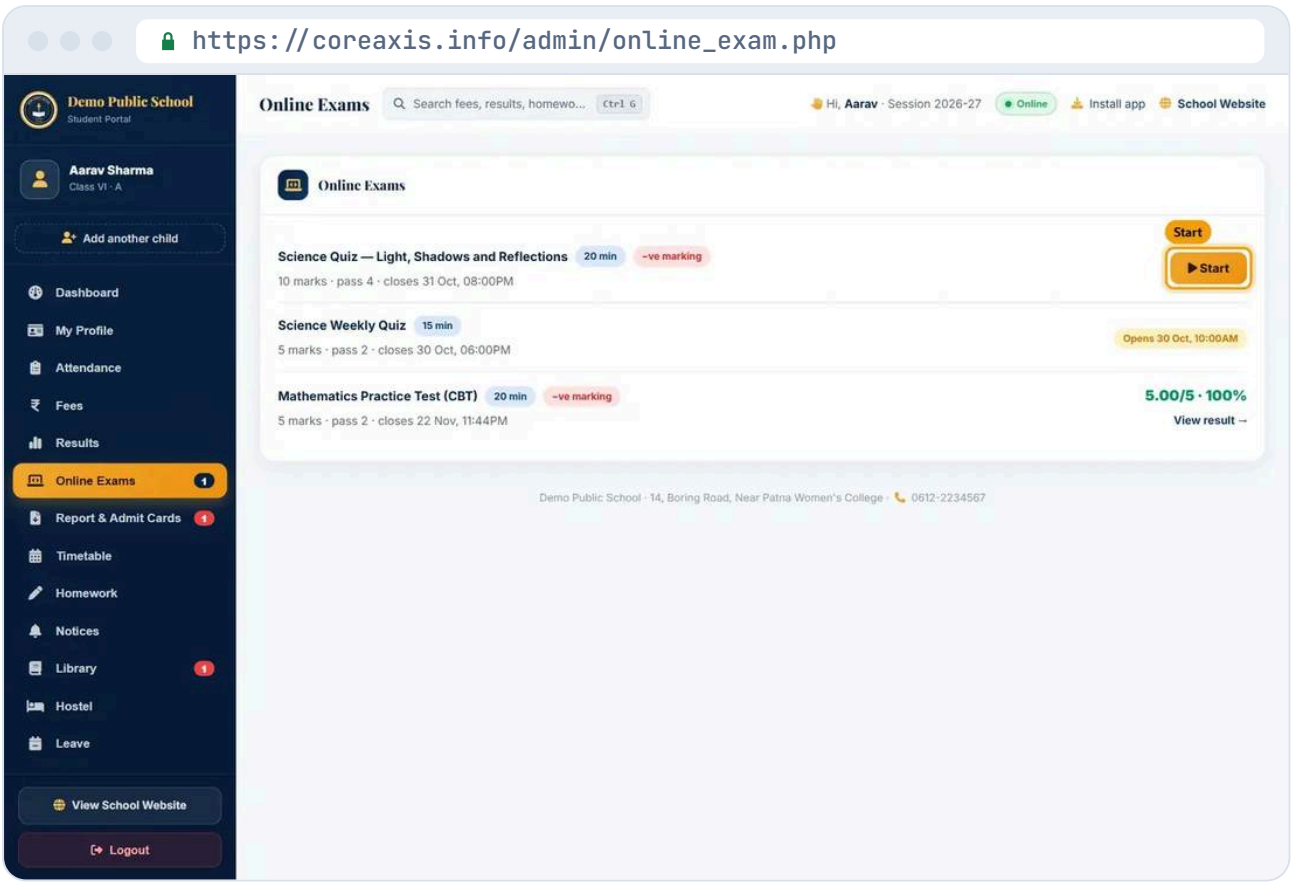


Published, 10 questions, 10 marks.

TIP A test without questions cannot be published ("Add at least one question before publishing.").

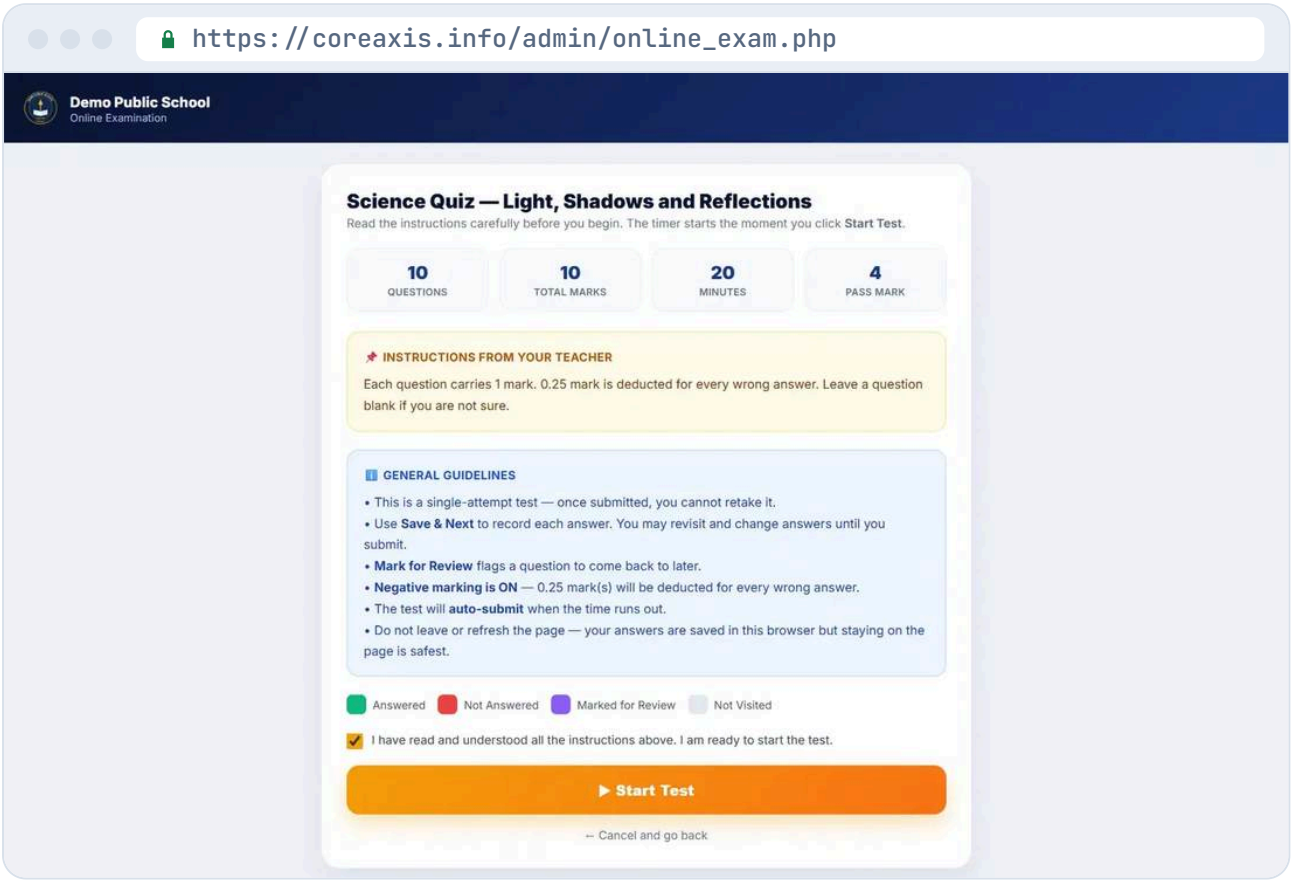
How a student takes the test (Aarav Sharma, Class VI-A)

1 In the portal, **Online Exams** lists the class's tests. Aarav clicks **Start**.



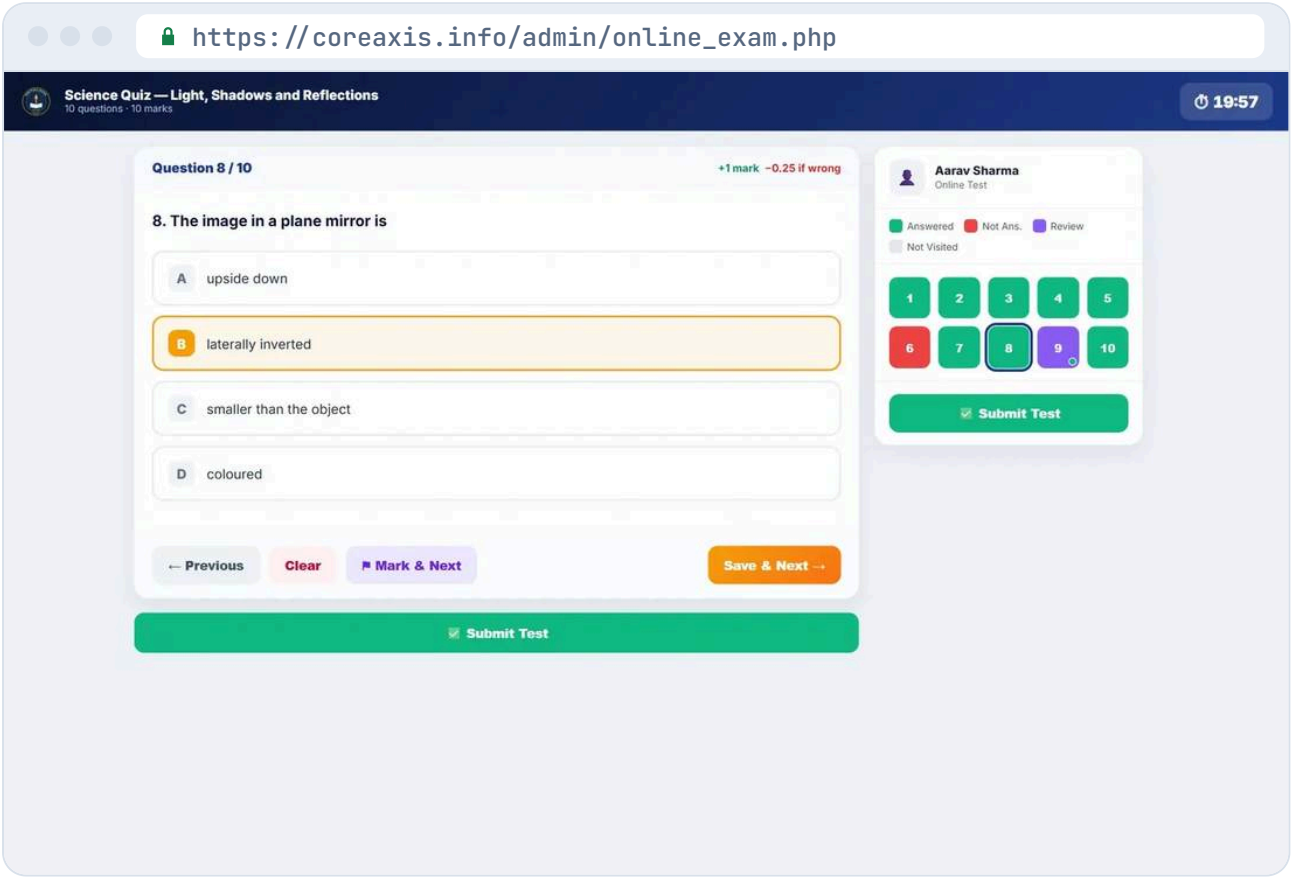
Portal › Online Exams.

2 The instruction page shows the duration, marks, negative marking and the colour legend. Aarav ticks "I have read and understood all the instructions above" and clicks **Start Test**.



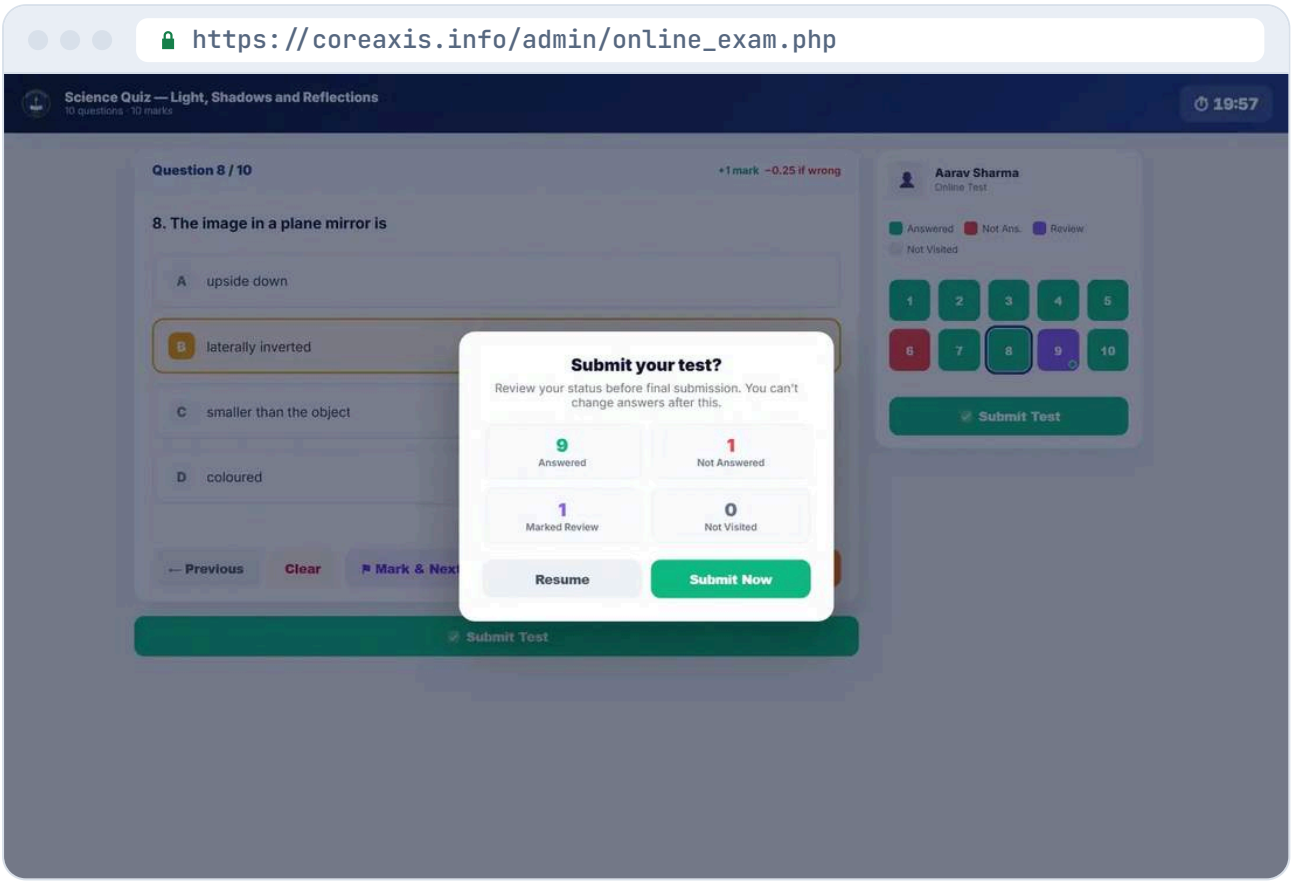
Instructions before the test.

3 One question shows at a time with the timer at the top right. **Save & Next**, **Mark & Next**, **Clear** and **Previous** move through the paper; the palette shows each question as Answered (green), Not Answered (red), Marked for Review (purple) or Not Visited (grey).



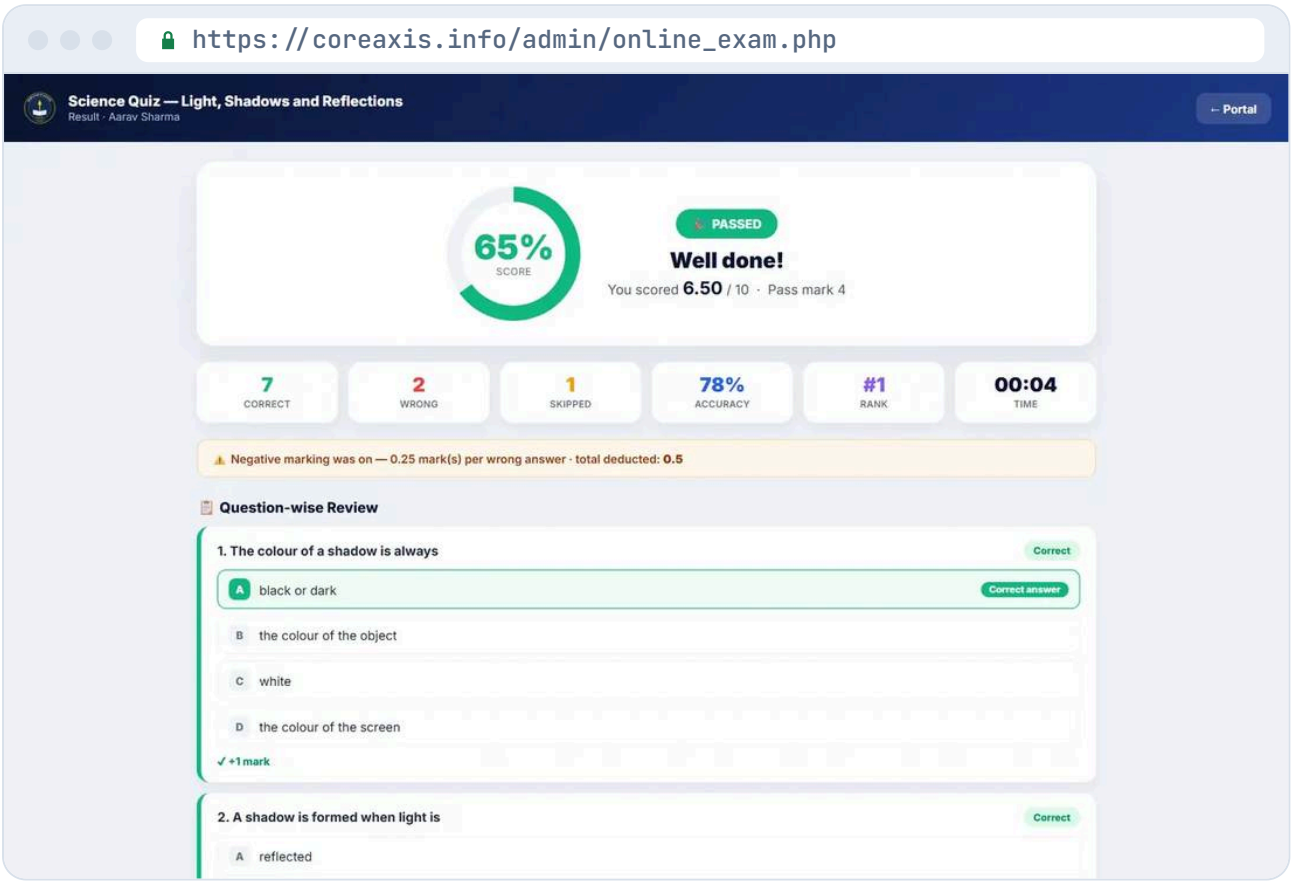
The exam screen with the question palette.

4 **Submit Test** shows a summary of answered, not answered, marked and not visited questions before the final **Submit Now**.



Summary before submitting.

5 The result appears at once: 6.50 out of 10 (7 correct, 2 wrong × 0.25 deducted, 1 skipped), PASSED, rank and time taken, followed by the question-wise review.



Aarav's result page.

TIP The test auto-submits when the time runs out or the window closes. Answers are kept in the browser if the page is refreshed by mistake.

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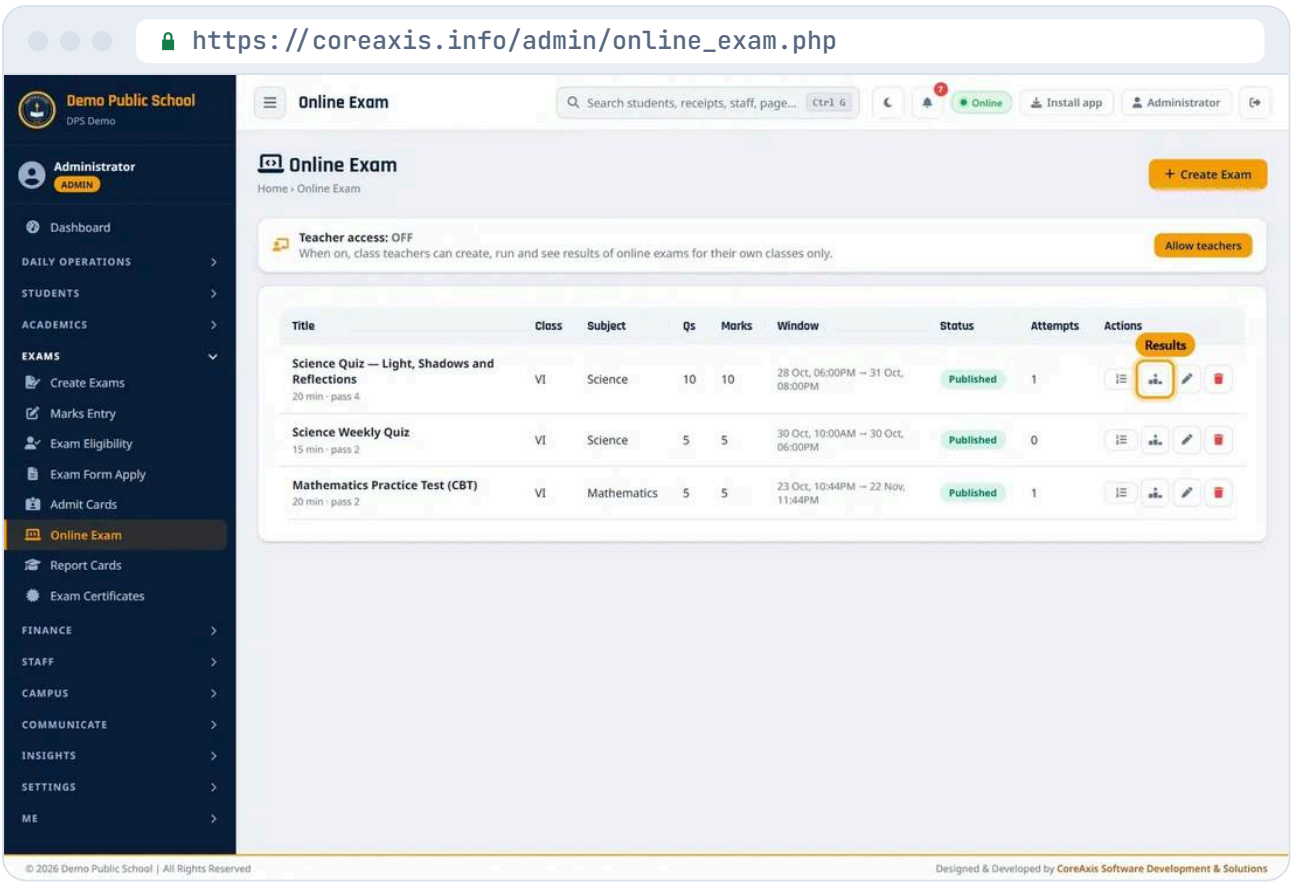
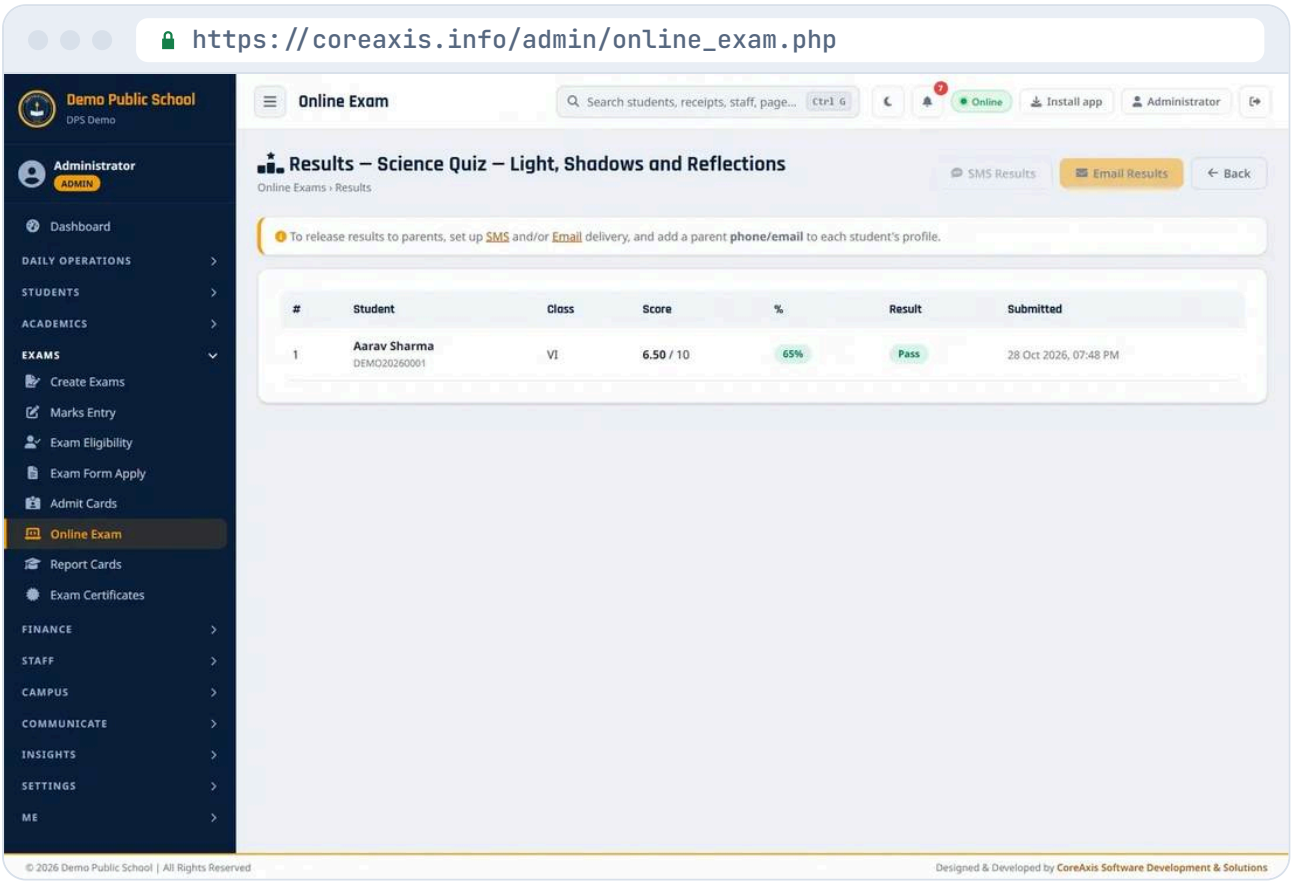
See results

1 In the Online Exam list, click the ranking icon (**Results**) in the test's row.



Results button.

2 The results table lists every attempt: student, class, score, %, Pass / Fail (or In progress) and submission time.



Results — Aarav Sharma, 6.50 / 10, 65%, Pass.

3 Click **SMS Results** or **Email Results** to send each parent the score. These buttons work once SMS / email is set up in Settings and parents' phone numbers or emails are on file.

Questions

Do online test scores go on the report card?

No. Online Exam is separate. Enter term marks in Marks Entry for report cards.

Can a student take the test twice?

No. Each student has one attempt. After submitting, the Start button changes to View result.

Can teachers create online tests?

Only when Admin or Principal clicks Allow teachers on this page. Teachers then see Online Exam in their menu and manage tests of their own class only.

EXAMS · CHAPTER 22

Report Cards

Admin | Principal | Teacher (own class)

MENU Exams › Report Cards

Report Cards turns the marks entered in Marks Entry into a printed Academic Record for each student: subject-wise Term I and Term II marks, grand total, grade, percentage, class rank, attendance, co-scholastic and discipline areas, the promotion line (on the final result only) and the grading scale. You choose the class, the Term I exam and (later in the year) the Term II exam, and one of four designs. As with admit cards, the first print is registered as the ORIGINAL in the Document Register.

Report Cards — Demo Public School

Screen at a glance

Marksheet Generation Rules	Enter marks first; Term I = Half Yearly / Unit Test exam; Term II = Annual / Final exam; rank is worked out class-wise by percentage.

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Grade Scale (CBSE Pattern)	A+ 91–100% Outstanding, A 81–90% Excellent, B+ 71–80% Very Good, B 61–70% Good, C+ 51–60% Above Avg, C 41–50% Average, D 33–40% Below Avg, E below 33% Fail.
Select Class *	The class to print. The student list below loads when you pick it.
Student (blank = all)	All Students in Class, or one student.
Term I Exam (Half Yearly) / Term II Exam (Annual)	The exams whose marks fill the two halves of the card. Choose — None — for a term not held yet.
Report Card Design	#1 Classic Blue, #2 Royal Maroon, #3 Emerald, #4 Royal Purple.
Generate & Print Report Cards	Opens the cards in a new tab.
Students table	Roll No, Admission No, Student Name, Father and a Report Card button for one student.

Print report cards for a class (example: Class VI, Term I = Half-Yearly Examination)

1. Open **Exams › Report Cards**.
2. Pick **Class VI** in **Select Class**. The page reloads with the 25 students of Class VI.
3. Pick **Half-Yearly Examination** in **Term I Exam (Half Yearly)**. Leave **Term II Exam (Annual)** as **— None —** until the annual exam is over.

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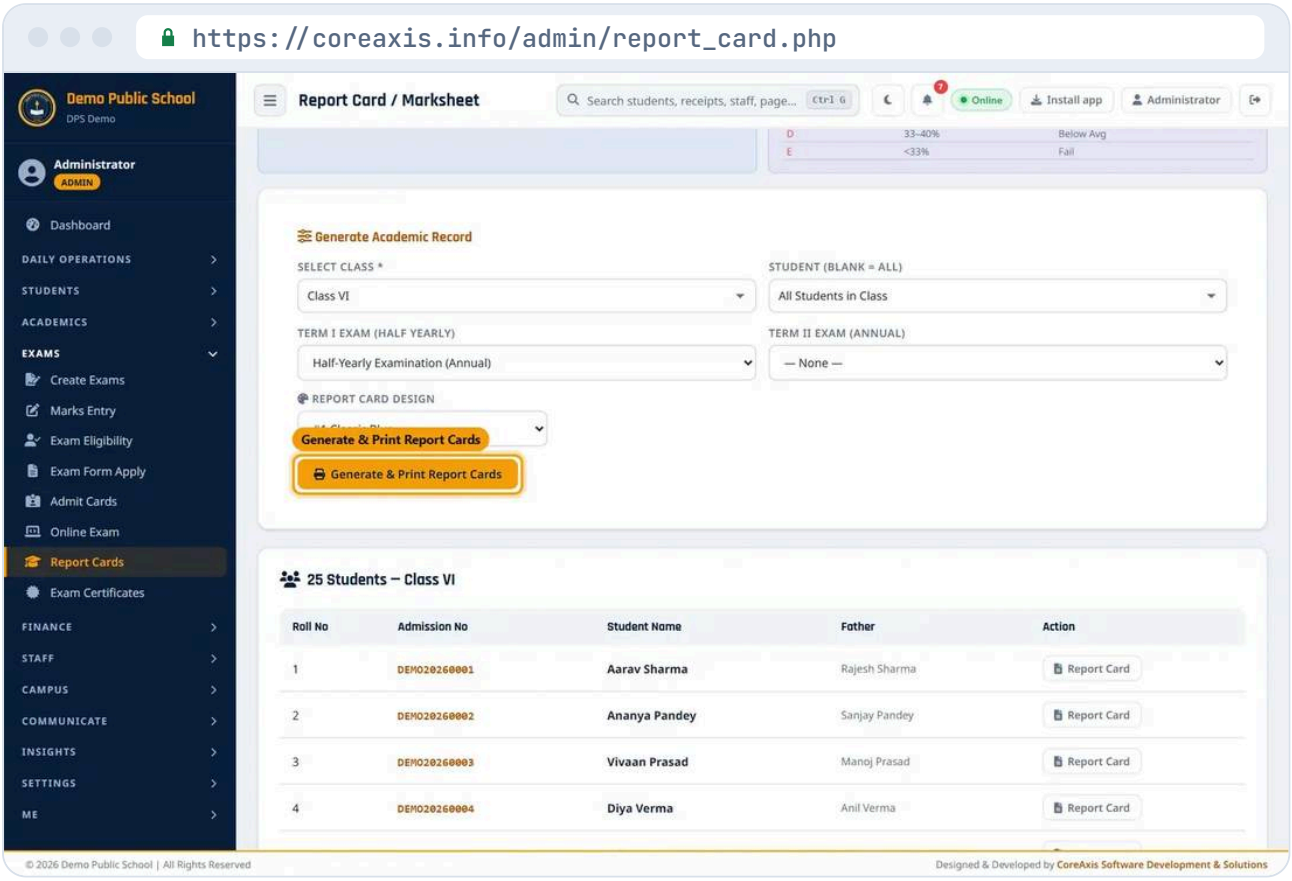
4 Keep **All Students in Class** and choose a design, for example **#1 Classic Blue**.

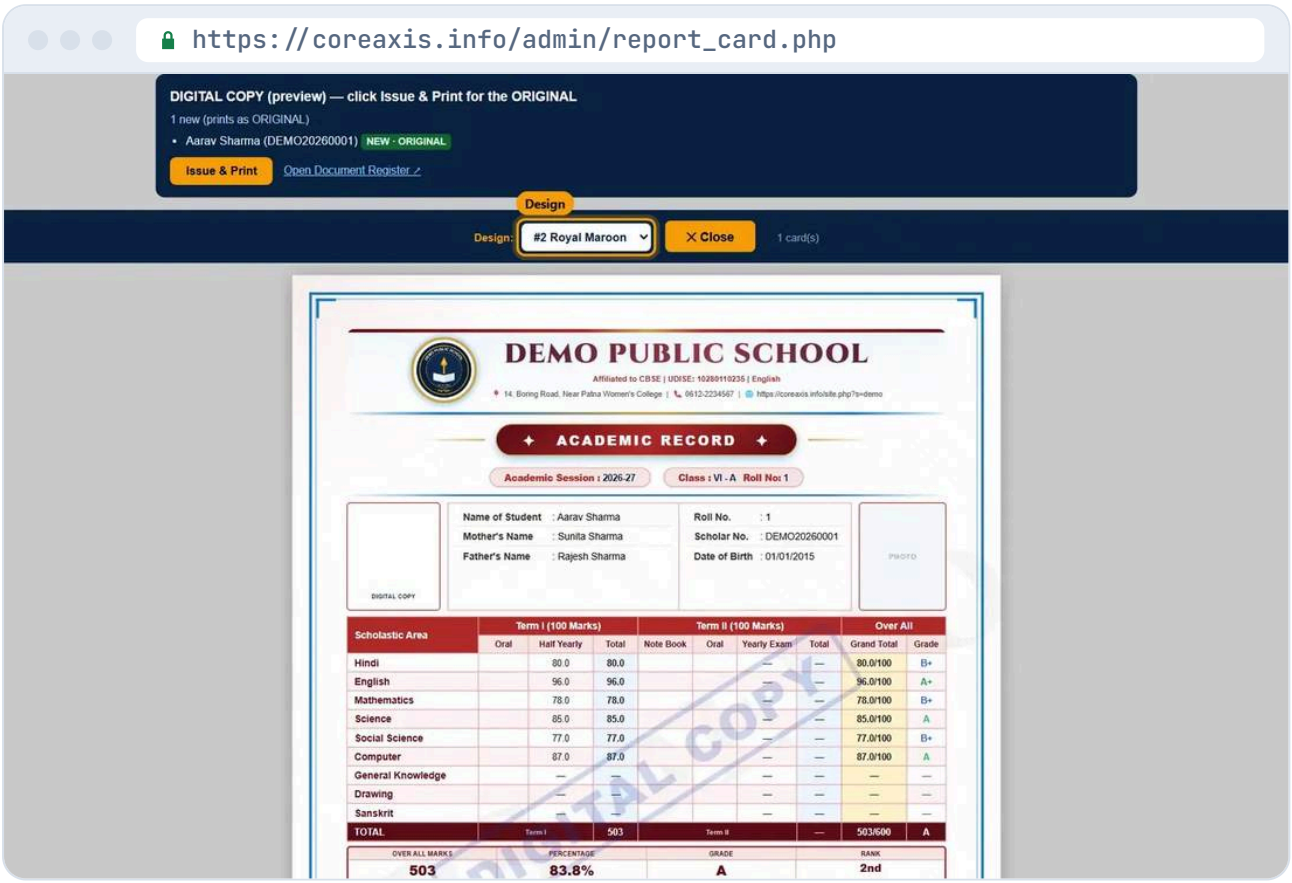


Generate Academic Record for Class VI.

5 Click **Generate & Print Report Cards**. A new tab opens with 25 cards as a **DIGITAL COPY (preview)**.

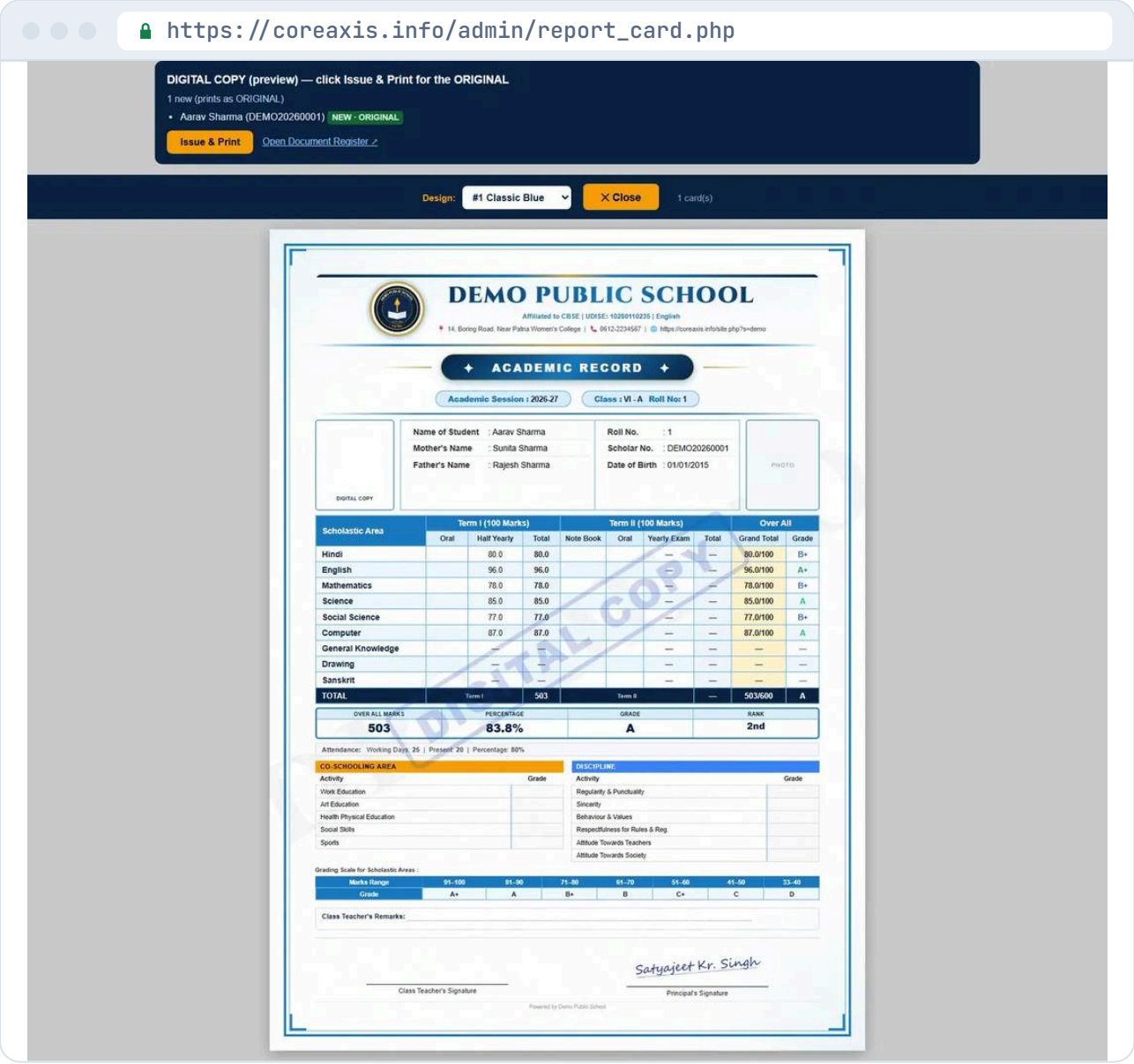
Aarav Sharma: 503/600, 83.8%, grade A, rank 2nd.

6 Scroll through the cards and check marks, attendance and rank. Change the **Design** list in the top bar to try another colour.



The same card in #2 Royal Maroon.

7 Check the bottom of the card. A Term I card ends with the grading scale, the Class Teacher's Remarks line and the signatures. It has no promotion line, because promotion is decided on the final result.



Aarav Sharma's full Term I card: no promotion line; the Principal's signature (Satyajeet Kr. Singh) at the bottom.

8 Click **Issue & Print**. The cards are registered as ORIGINAL and the print window opens. Print on A4.

TIP To print one student's card, click **Report Card** in that student's row.

TIP The blank Oral and Note Book columns, co-scholastic grades, discipline grades and the Class Teacher's Remarks line are left for the teacher to fill in by hand.

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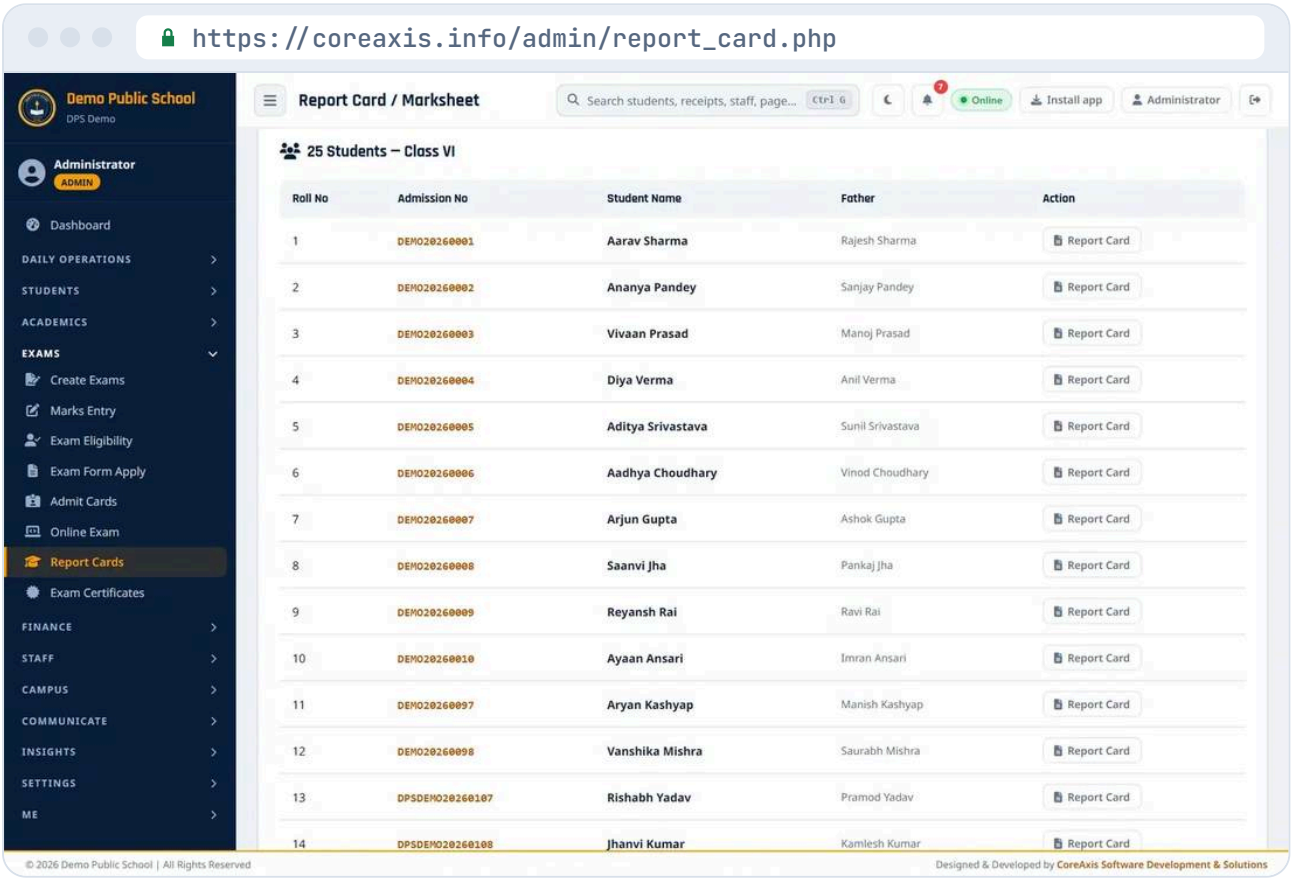
TIP Subjects with no marks in the chosen exams print with dashes.

TIP The promotion line (for example "Congratulations! Promoted to Class VII") prints only when a Term II (Annual) exam is chosen, that is on the final result of the year. It follows the promotion rule set in School Profile.

One student or one exam from the exam list

1. Pick the class, then pick the student in **Student (blank = all)**, or use the **Report Card** button in the students table.



Report Card button per student.

2. From **Exams › Create Exams** you can also click the report-card icon in an exam's row; it opens this page with that exam as Term I.

Questions

The rank looks wrong.

Rank is worked out from the percentage of all students of the class in the chosen exams. Check that every student's marks are entered and saved in Marks Entry.

Can parents download the report card?

Yes, from Report & Admit Cards in the portal. Their download is marked DIGITAL COPY; the stamped ORIGINAL is the one the school prints.

Can I use a unit test as Term I?

Yes. Any exam of the session can be chosen for either term; the column heading on the card still reads Half Yearly / Yearly Exam.

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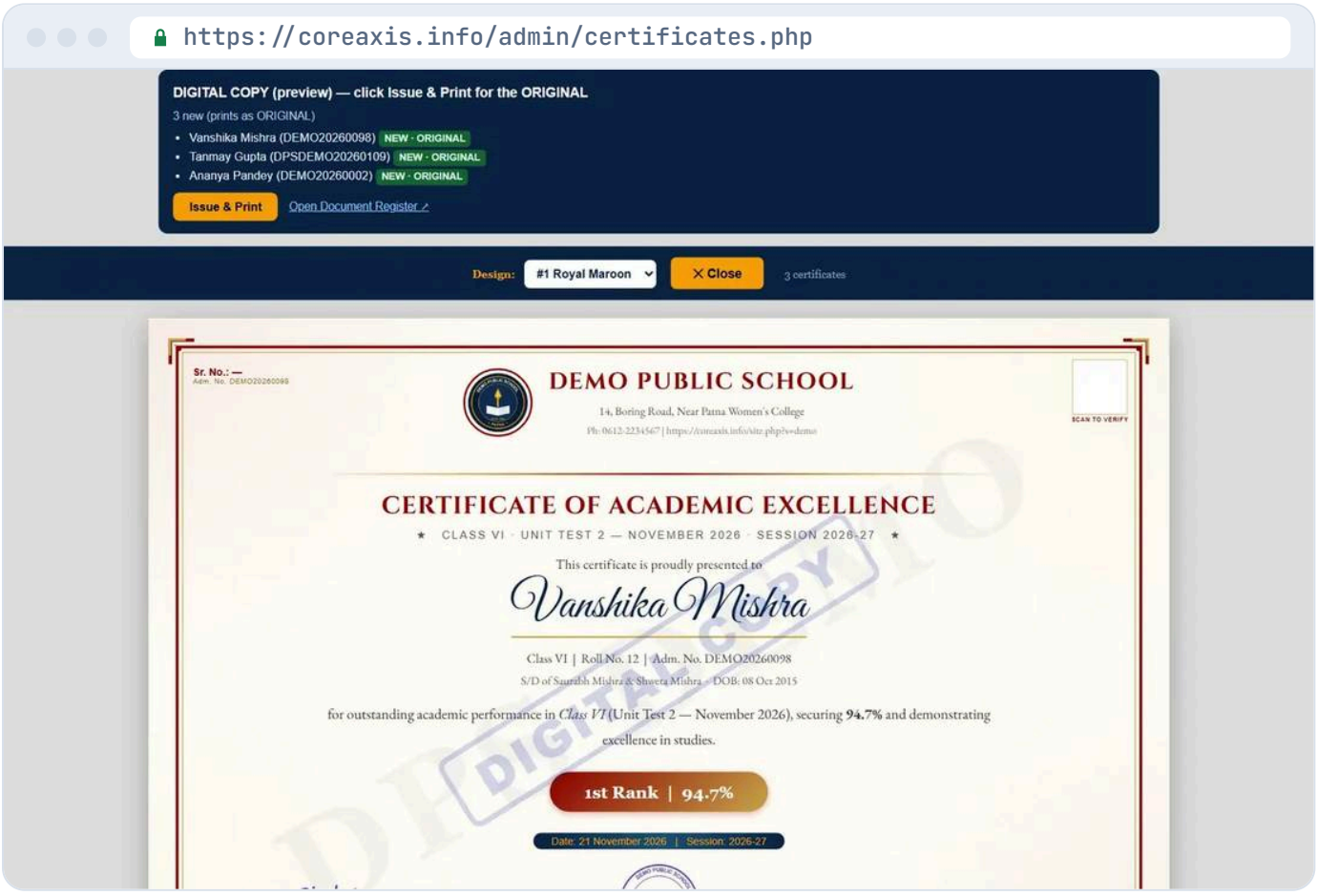
EXAMS · CHAPTER 23

Exam Certificates

Admin | Principal | Teacher (own class)

MENU Exams › Exam Certificates

Exam Certificates prints A4 landscape certificates in four designs. In Class / Academic mode it uses an exam's marks to find the toppers of a class (rank and percentage) and prints Academic Excellence or Achievement certificates, or Participation certificates for every student. In Competition / Event mode it uses the positions and prizes recorded for a competition (Communicate › Competitions). Each certificate carries a QR code to verify it, and the first print is registered as the ORIGINAL in the Document Register. Transfer, bonafide and character certificates are on a different page (Students › TC / Bonafide).



Exam Certificates — Demo Public School

Screen at a glance

Certificate Generation Rules / Print & Design Info	Reminders: create and score the competition first, print on A4 Landscape, add the school seal after printing.

Certificate Source	Competition / Event or Class / Academic. The fields below change with it.
Certificate Design	#1 Royal Maroon, #2 Royal Navy, #3 Emerald, #4 Royal Purple.
Class / Exam (Optional — for %/Rank)	Class / Academic mode: the class and the exam whose marks decide rank and percentage.
Certificate Type (class)	Academic Excellence, Achievement or Participation.
Merit for	Topper only (Rank 1), Top 3, Top 5 or Top 10 ranks — for Excellence and Achievement.
Competition / Event and Certificate Type (competition)	Pick the competition and Certificate of Merit, Participation or Appreciation.
Student (Optional = All)	Leave as All Students to print every certificate, or pick one student.
Generate & Print	Opens the certificates in a new tab.
List	The students who will get a certificate, with Percentage and Rank (class mode) or Position and Prize (competition mode).

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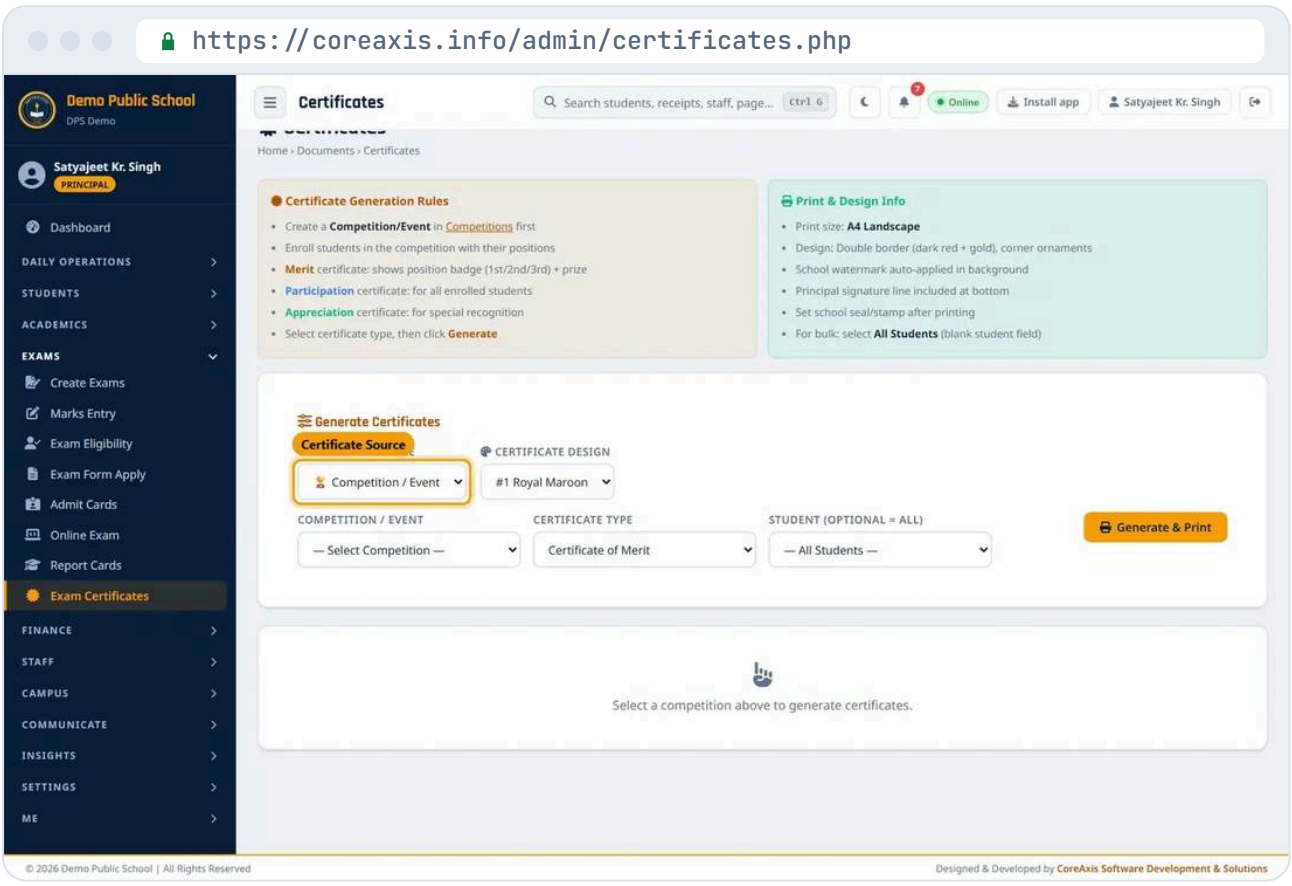
Print toppers' certificates for an exam (example: Class VI, Unit Test 2, top 3)

1 Open **Exams › Exam Certificates**.

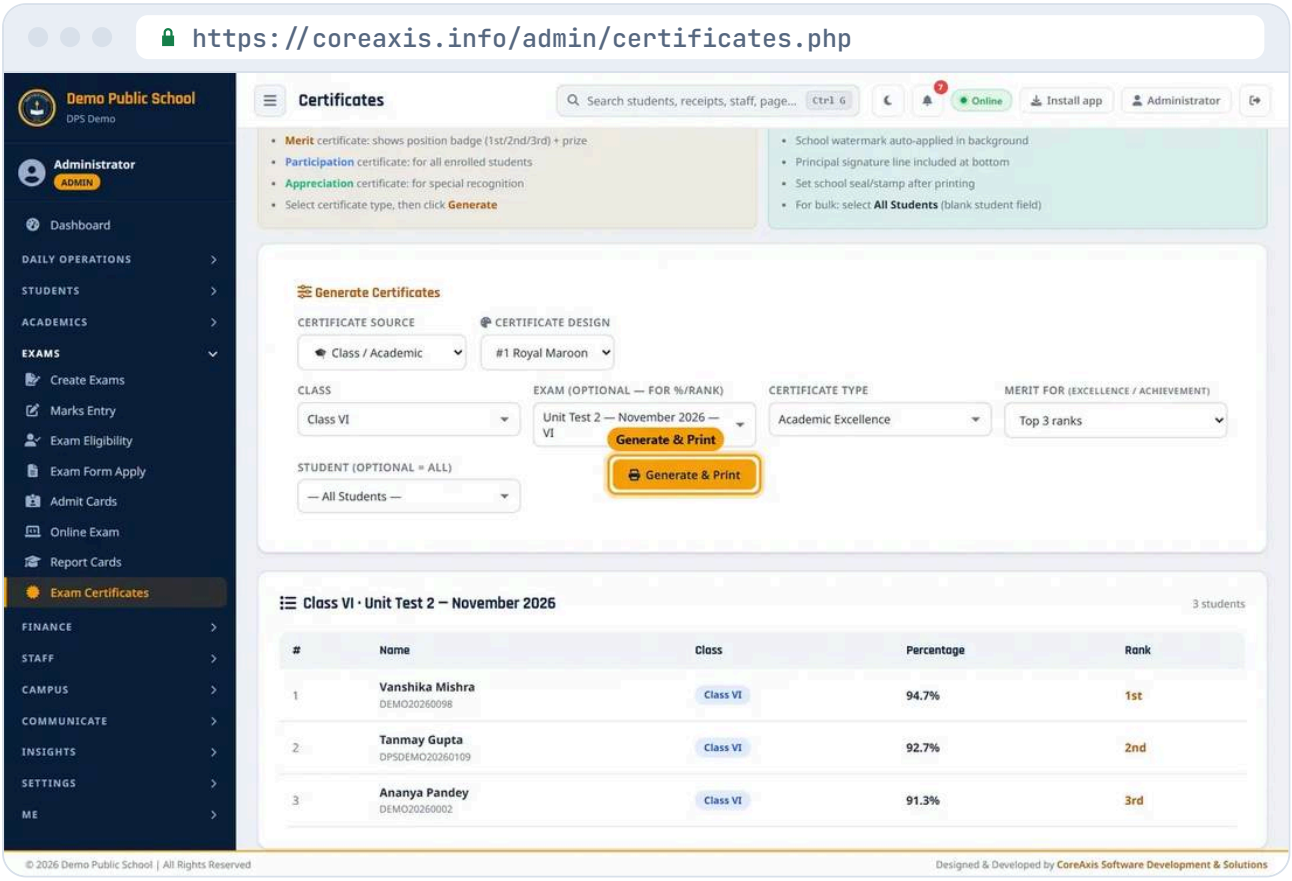


Exam Certificates page.

2 Pick **Class / Academic** in **Certificate Source**.

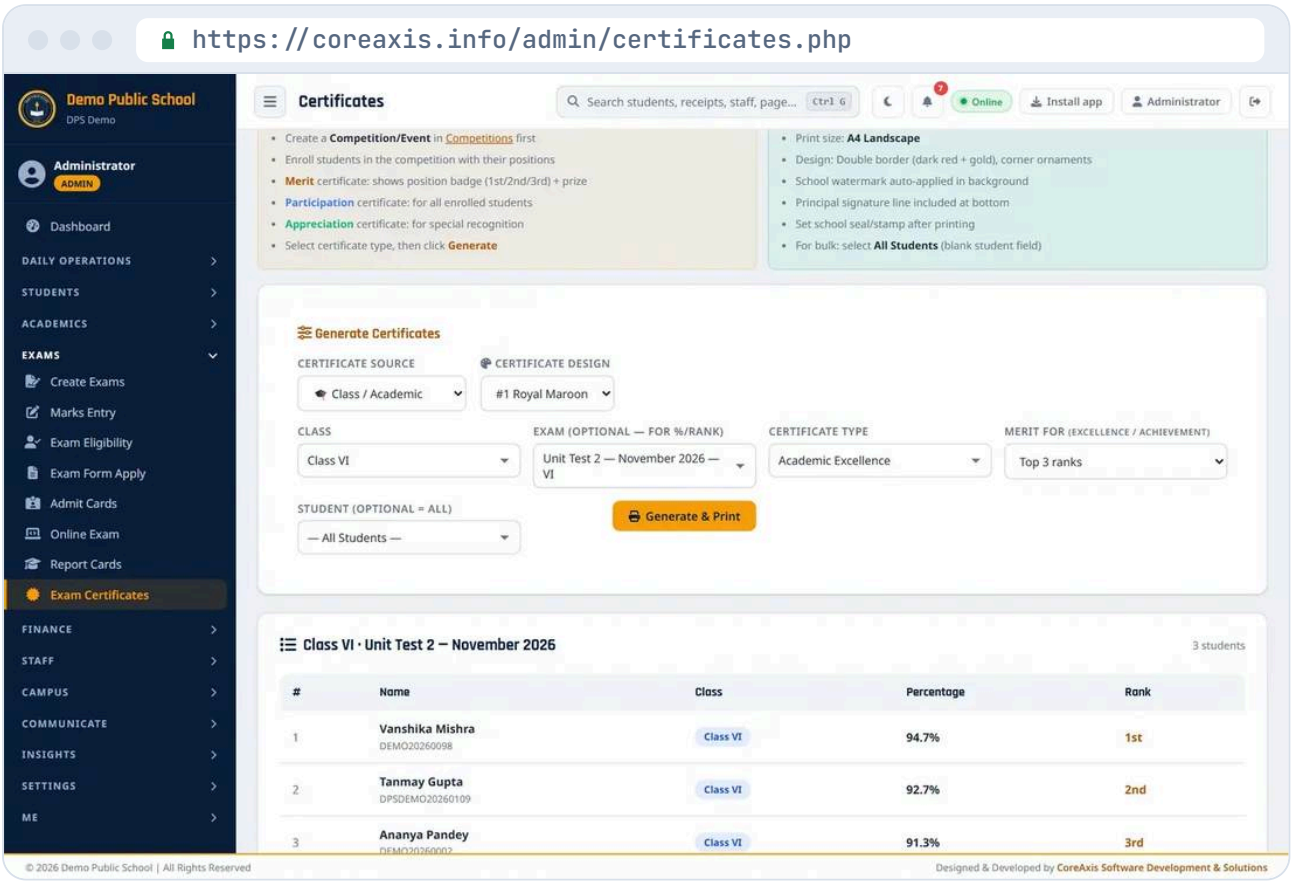
3 Pick **Class VI** in **Class** and **Unit Test 2 — November 2026 — VI** in **Exam**.

4 Pick **Academic Excellence** in **Certificate Type** and **Top 3 ranks** in **Merit for**.



Class mode with exam, type and merit chosen.

5 Check the list below: Vanshika Mishra 94.7% (1st), Tanmay Gupta 92.7% (2nd), Ananya Pandey 91.3% (3rd).



The three toppers of Unit Test 2.

6 Choose a **Certificate Design** and click **Generate & Print**. The certificates open in a new tab as a **DIGITAL COPY (preview)**.

Certificate of Academic Excellence for Vanshika Mishra — 1st Rank, 94.7%.

7 Click **Issue & Print** to register them as ORIGINAL and print on A4 landscape. Sign and add the school seal.

TIP Rank and percentage come from Marks Entry. Enter and save all marks of the exam before printing.

TIP Choose Participation to print a certificate for every student of the class (no exam needed).

Print certificates for a competition (example: Inter-House Quiz Competition)

1 Pick **Competition / Event** in **Certificate Source**.

2 Pick **Inter-House Quiz Competition (19 Oct 2026)** in **Competition / Event**.

3 Pick **Certificate of Merit** for winners, **Certificate of Participation** for everyone enrolled, or **Certificate of Appreciation** for special recognition.

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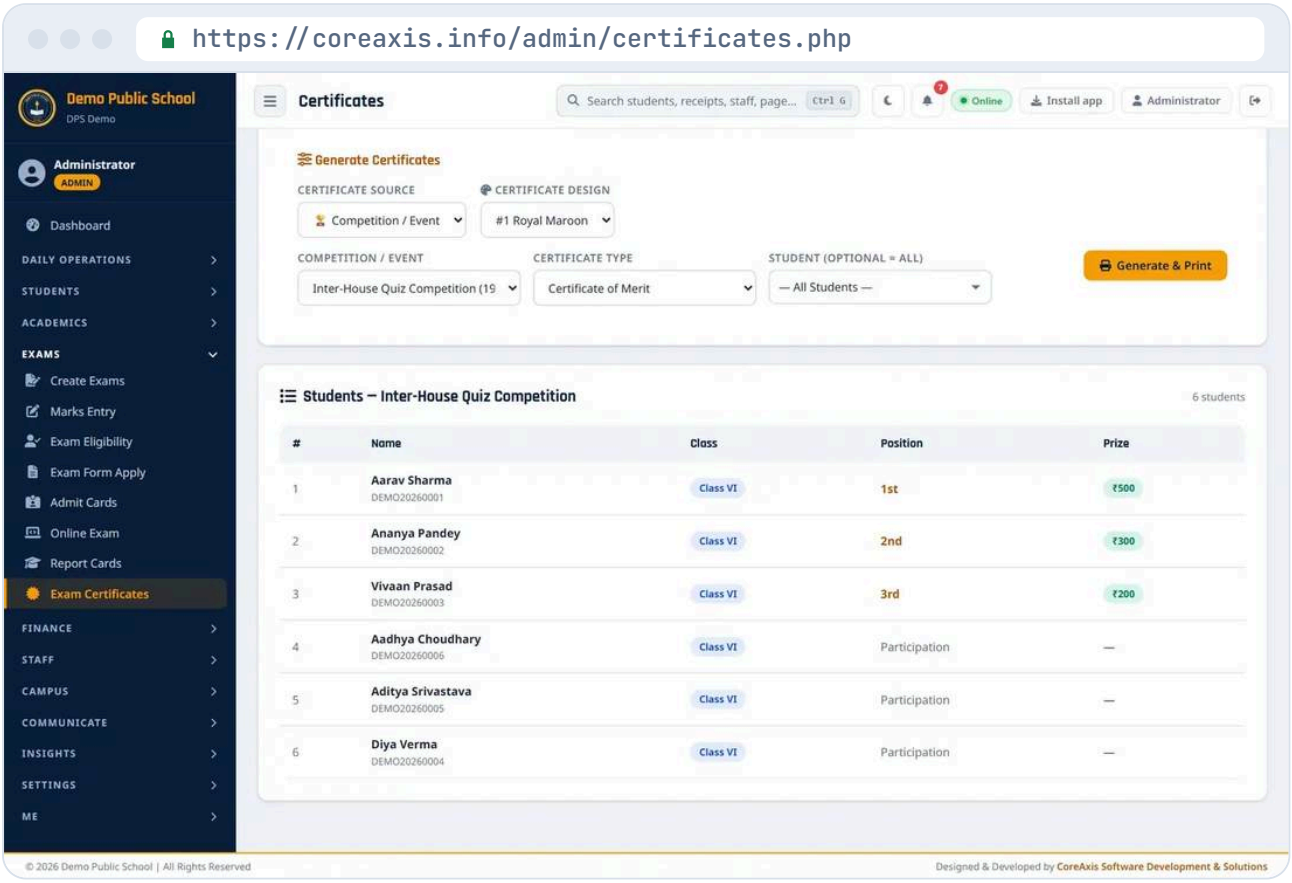
4 Check the list: Aarav Sharma 1st (₹500), Ananya Pandey 2nd (₹300), Vivaan Prasad 3rd (₹200). Students who took part without a place (Aadhya Choudhary, Aditya Srivastava, Diya Verma) show **Participation**.



Competition mode: positions and prizes from Competitions; the other students show Participation.

5 Click **Generate & Print**, check the preview and click **Issue & Print**.

TIP Positions and prizes are entered in Communicate › Competitions when you record the results. Correct them there, not here.

TIP A student recorded as Participant (no 1st / 2nd / 3rd) prints with "Participation" on a merit certificate, not a rank.

Questions

The list is empty in Class / Academic mode.

For Academic Excellence and Achievement you must choose an exam; the page asks you to. Also check that marks are saved for that exam.

Where do I print a Transfer Certificate or Bonafide Certificate?

In Students › TC / Bonafide. This page is only for exam and competition certificates.

Can I reprint a certificate?

Yes. A reprint is marked DUPLICATE COPY and recorded in the Document Register.

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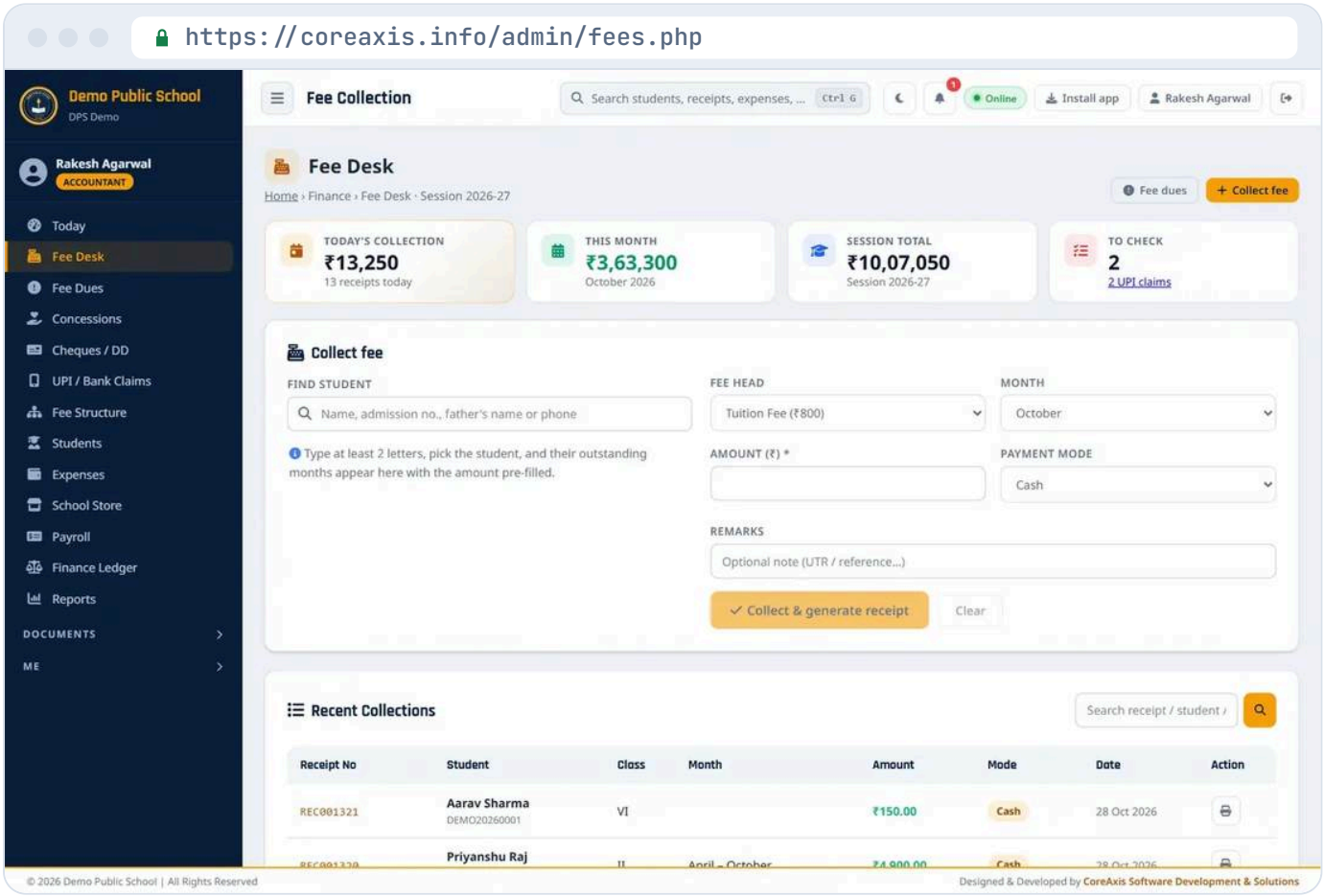
FINANCE · CHAPTER 24

Fee Desk

Admin Principal Accountant MENU Daily Operations › Fee Desk (Accountant: Fee Desk)

The Fee Desk is the counter screen of the school office. You search a student, the dues appear with the amount filled in, and one click makes a numbered receipt. Every receipt updates Fee Dues, the Finance Ledger (Cash Book or Bank Book) and the parent portal at once. Cheques collected here wait in Cheques / DD until the bank clears them.



Fee Desk — Demo Public School

Screen at a glance

The top row has four cards (KPIs). Below them is the Collect fee panel, and at the bottom the Recent Collections list.

Today's collection	Money received today and the number of receipts made today. Click it to open today's entries in the Finance Ledger.

This month	Total collected in the current calendar month (for example October 2026). Click it to open the Finance Ledger overview.
Session total	Total collected in the running academic session (2026-27).
To check	Cheques waiting for the bank plus UPI / bank claims waiting to be verified, for example "1 cheque · 3 UPI claims". Each part is a link to Cheques / DD or UPI / Bank Claims.
Fee dues (button)	Opens the Fee Dues list of students who owe fees.
Collect fee (button)	Jumps to the Collect fee panel and puts the cursor in Find student.
Find student	Type at least 2 letters of the name, admission no., father's name or phone. Pick the student from the list.
Fee head	The head the money is booked under. Tuition Fee is selected by default. The list holds every fee head of the school: the heads set in Fee Structure (Annual Charges, Examination Fee ...), the other heads (Admission Fee, Sports Fee, Computer Fee ...) and charges such as Exam Form Fee, Cheque Bounce Charges and School Store. Choose another head to pay a separate charge.
Month	The month the receipt is recorded against. It is set for you when you tap a month or All.
Amount (₹)	Filled in from the dues. You can change it (part payment or advance).
Payment mode	Cash, Online (UPI, NEFT, card swipe), Cheque or DD. Cheque and DD show three more boxes: Cheque no., Cheque date and Bank.
Remarks	Optional note printed on the receipt, for example the UPI UTR number.
Collect & generate receipt	Saves the payment. The button shows the amount, for example "Collect ₹2,000 & generate receipt".
Clear	Empties the form to start with another student.

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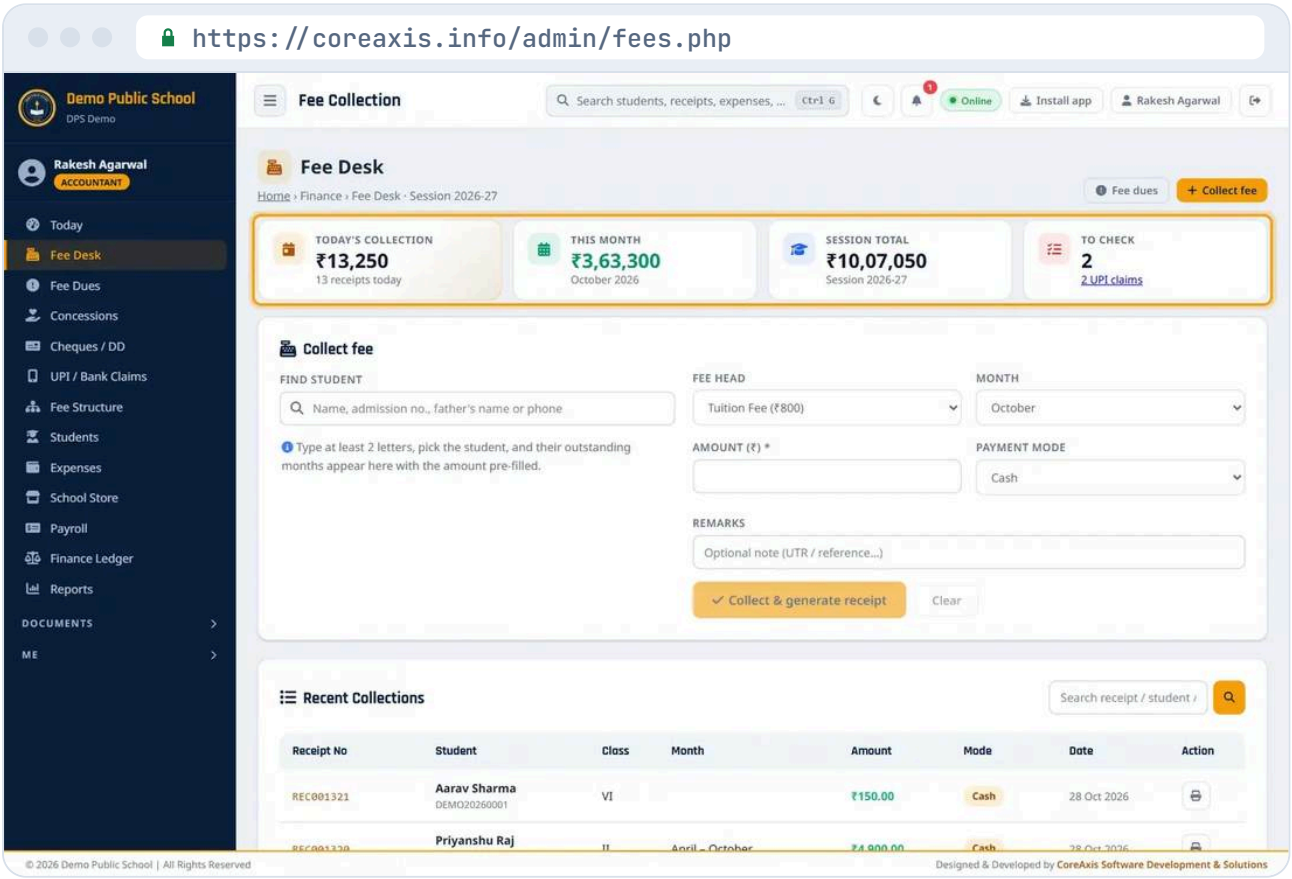
Recent Collections	Latest receipts with Receipt No, Student, Class, Month, Amount, Mode and Date. For a payment that covers several months, Month shows the range (for example August – October). Search by receipt no., name or admission no. The printer icon opens the receipt. Admin / Principal also see a red bin icon to delete a receipt.

Read a student's dues (example: Harshit Kashyap, Class III-A)

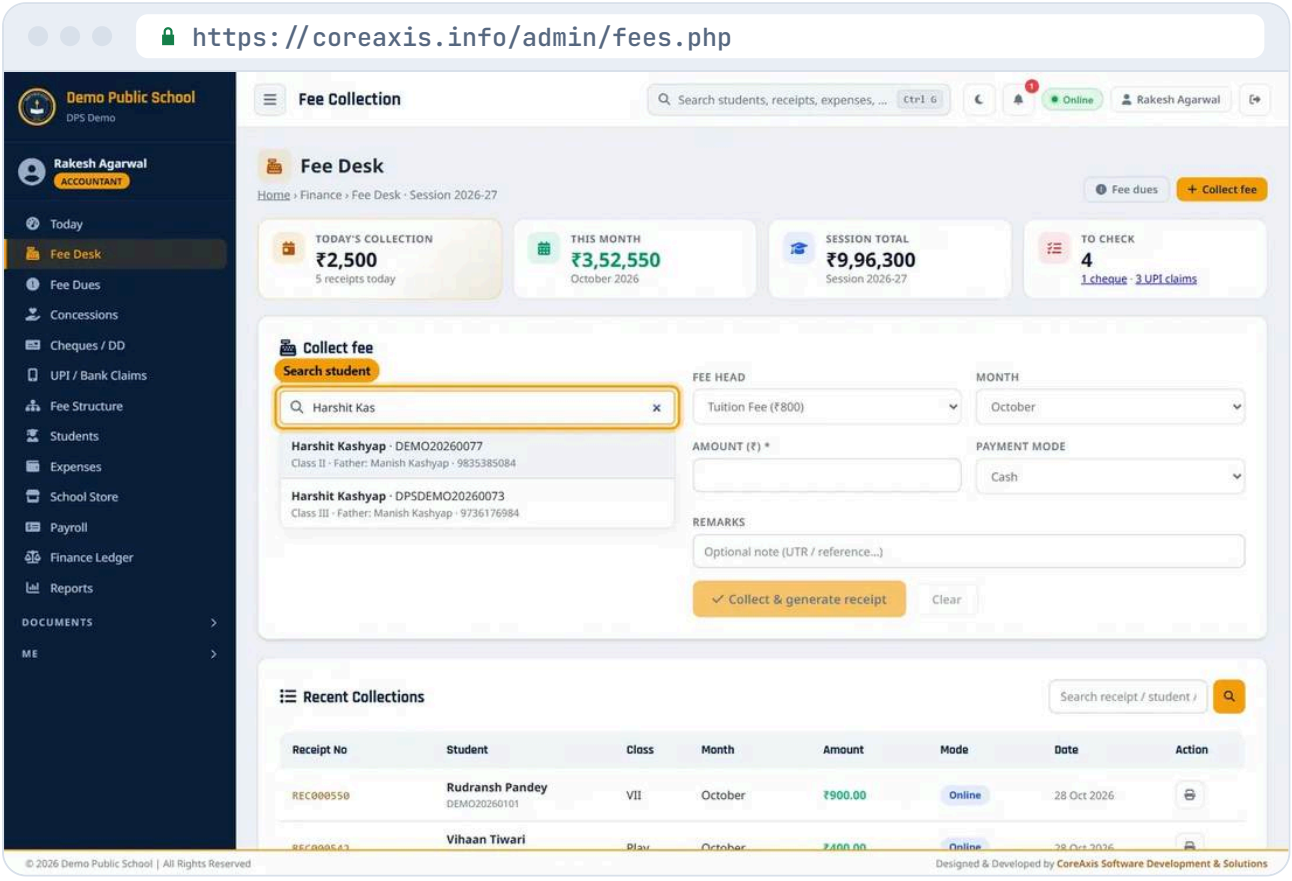
Before taking money, look at the student card. It tells you what is billed, what is paid and what is still due.

1. Open **Fee Desk** from the menu.



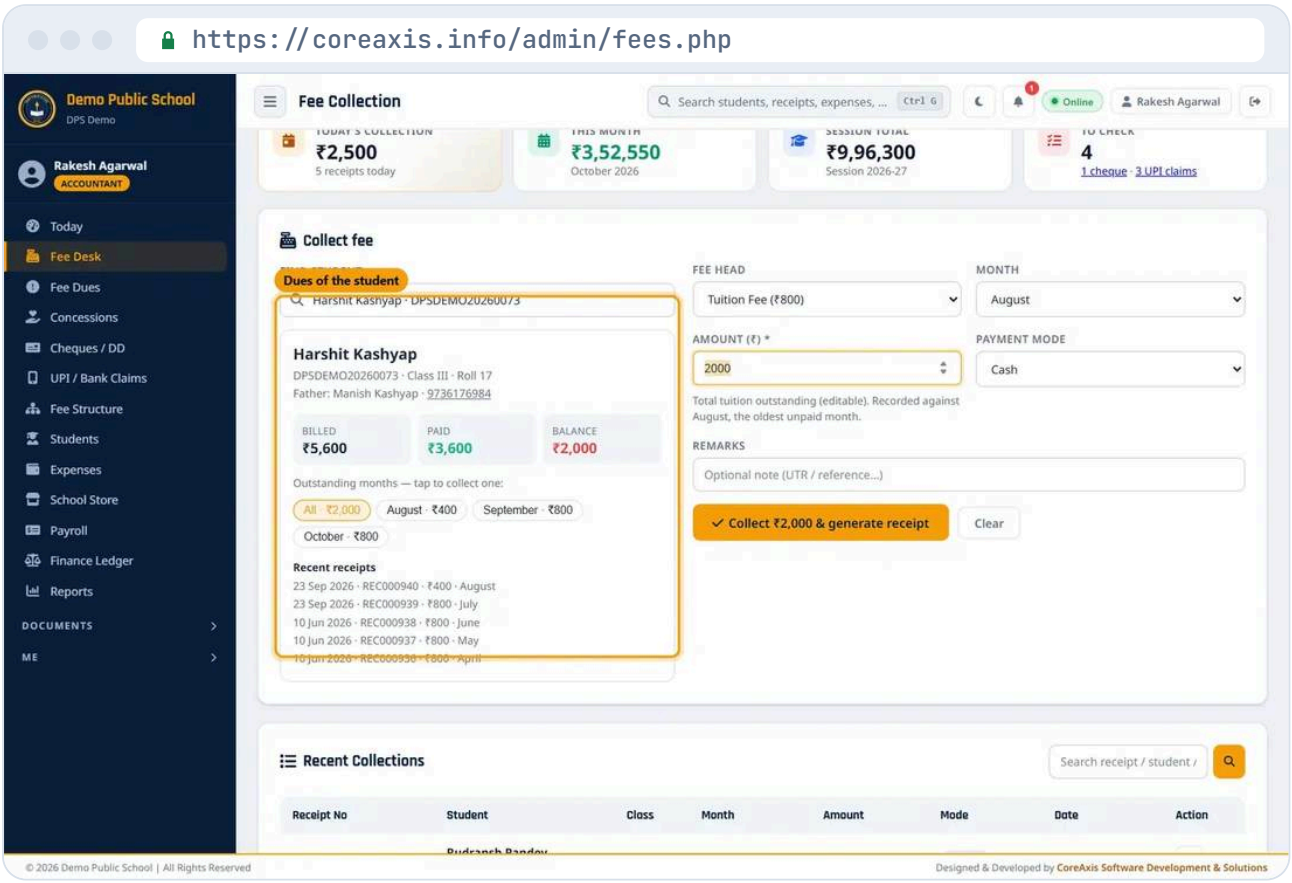
The Fee Desk with the four KPI cards on top.

2 Click in **Find student** and type part of the name, for example `Harshit Kas`. Two students with this name appear: one in Class II and one in Class III. Check the class and the father's name, then pick **Harshit Kashyap · DPSDEMO20260073** (Class III).



The list shows class, father's name and phone so you pick the right child.

3 Read the card. **Billed** ₹5,600 is the tuition billed up to October (7 months × ₹800). **Paid** ₹3,600 is what the family has paid. **Balance** ₹2,000 is still due.



Student card: billed, paid, balance and the unpaid months.

4 Look at **Outstanding months**. Each unpaid month is a chip with its amount: August ₹400 (part paid earlier), September ₹800, October ₹800. **All · ₹2,000** is the total.

5 Look at **Recent receipts** at the bottom of the card to see the family's last payments and their receipt numbers.

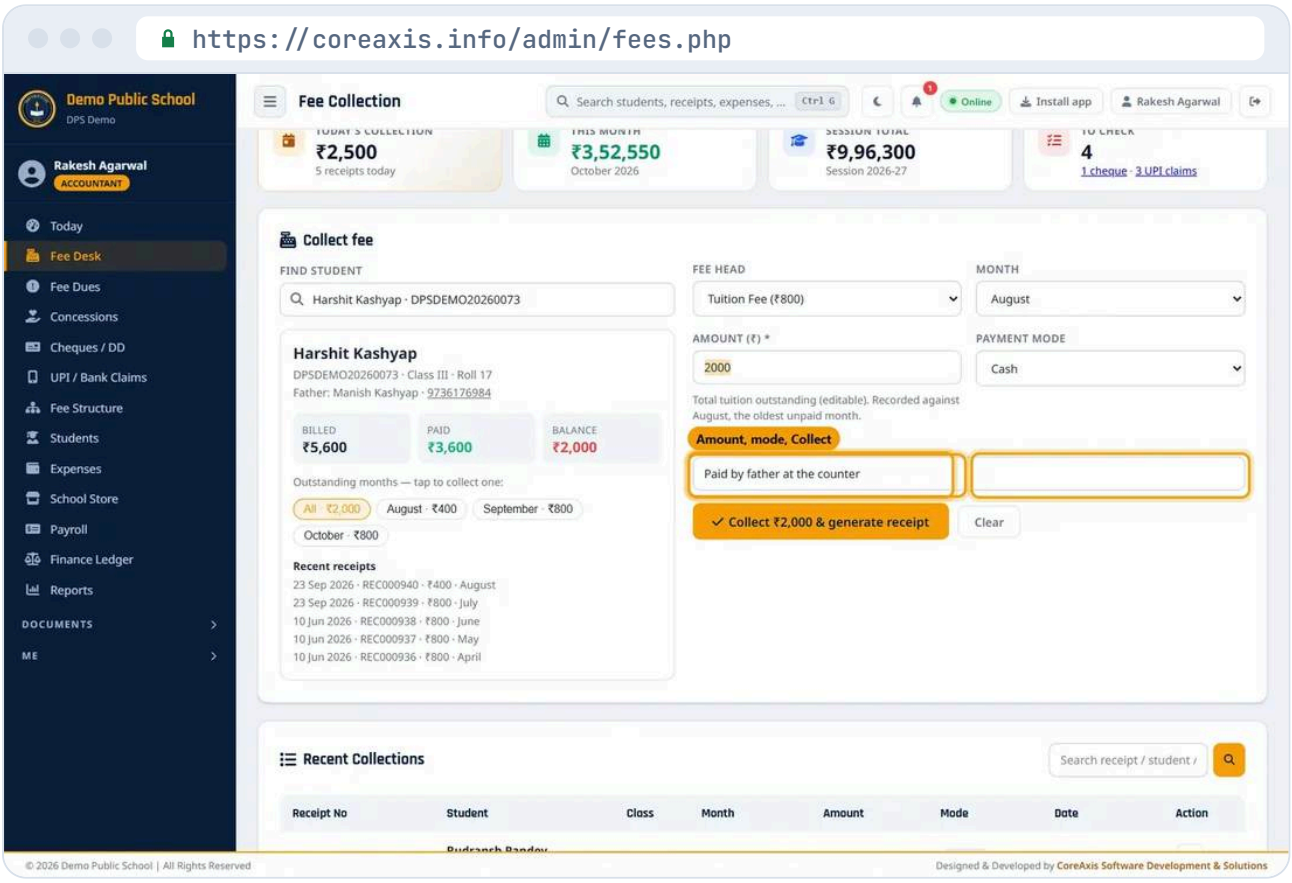
TIP If the student also owes other charges (exam fee, transport, cheque bounce charge, late fee), they show under **Other charges & late fee** with their own chips. See the example of Shaurya Dubey below.

TIP If the student has a concession, a green line **Concession this session** shows the amount and the rule, for example Kabir Sharma (Class V-A): "Staff ward · 50% of tuition · Apr–Mar".

TIP A green line **Tuition paid in advance** means the family has paid more than billed so far.

Collect a fee in cash (example: Harshit Kashyap, Class III-A, ₹2,000 for August–October)

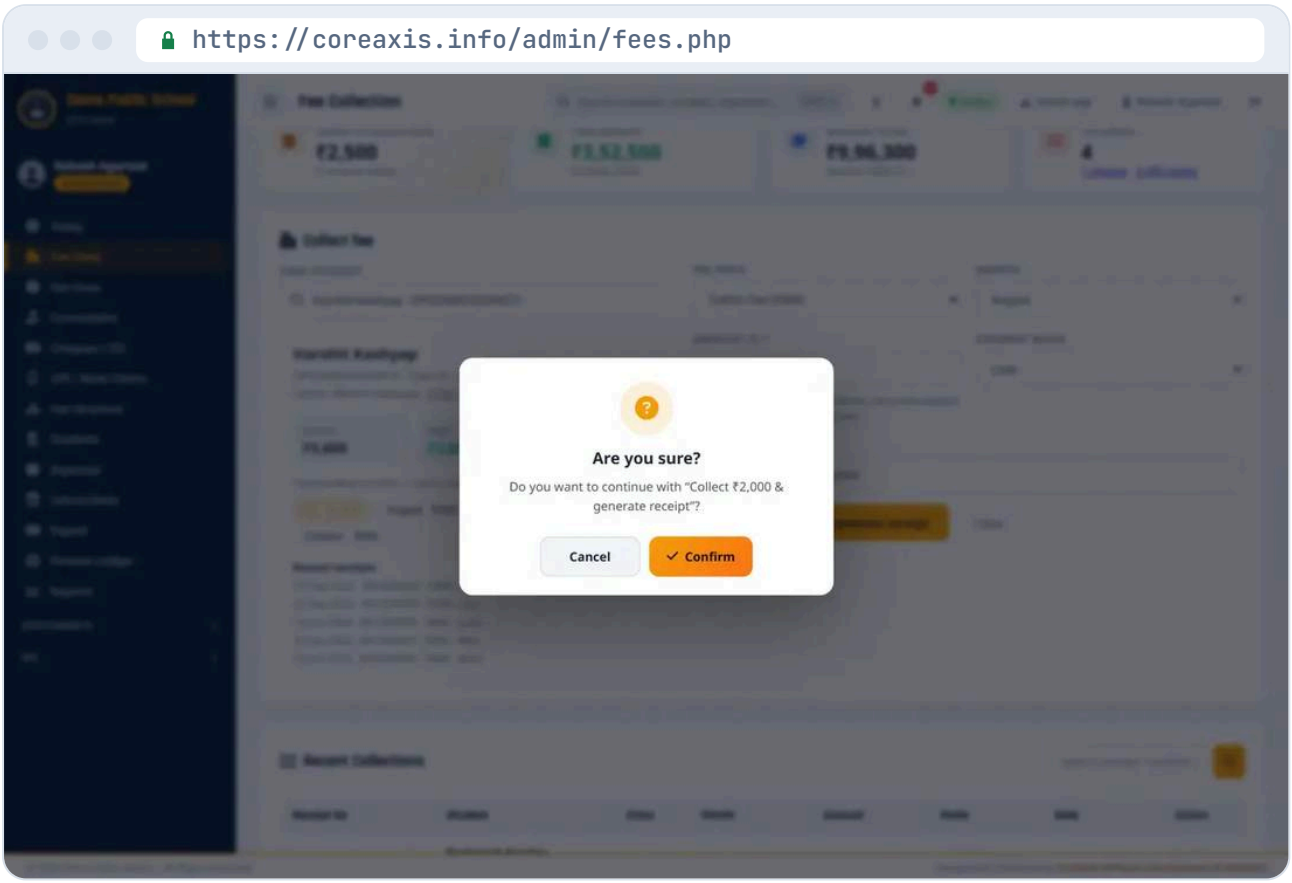
1. Search and pick **Harshit Kashyap** (Class III) as shown above.
2. Leave the **All · ₹2,000** chip selected. **Amount (₹)** shows 2000 and the note says it is recorded against August, the oldest unpaid month. The money settles the oldest month first.
3. Keep **Payment mode** as **Cash**.
4. Type a note in **Remarks** if needed, for example `Paid by father at the counter`.



Amount, payment mode and the Collect button.

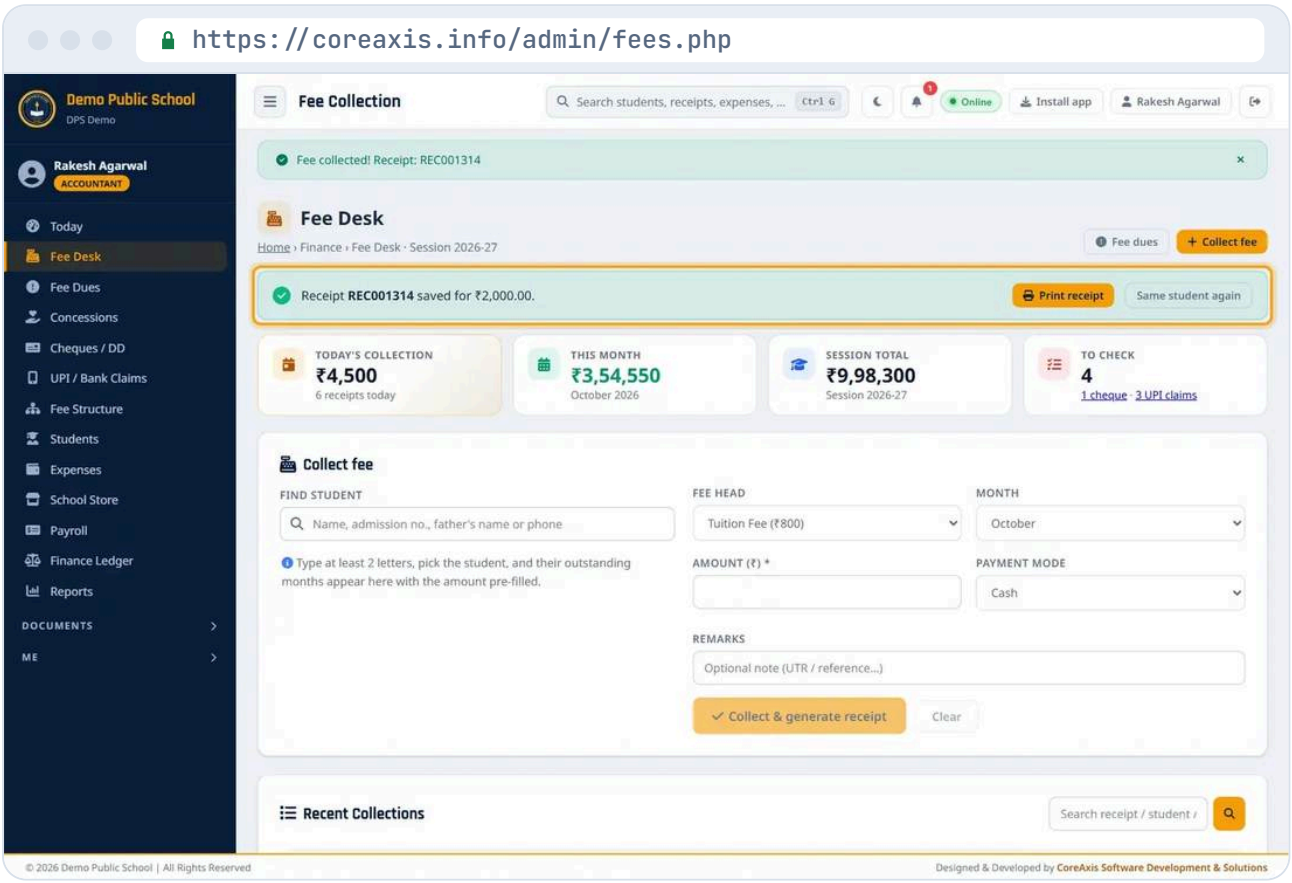
5. Click **Collect ₹2,000 & generate receipt**.

6 The app asks "Do you want to continue with Collect ₹2,000 & generate receipt?". Check the amount and click **Confirm**.



Every save asks once more. Click Cancel if the amount is wrong.

7 A green bar shows **Receipt REC001314 saved for ₹2,000.00**. Today's collection goes up at once.



The new receipt number with Print receipt and Same student again.

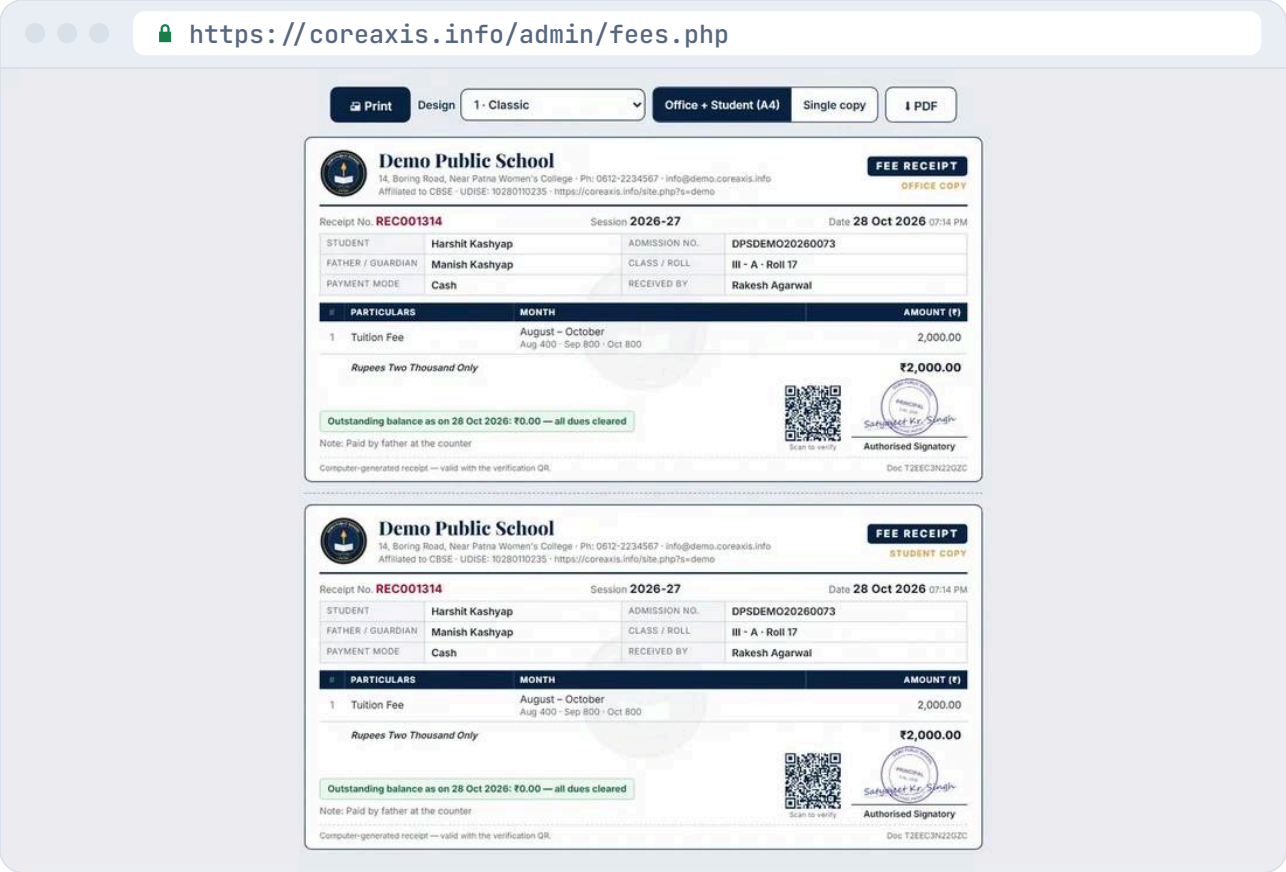
8 Click **Print receipt** to open the receipt, or **Same student again** to take another payment from the same family.

TIP To collect one month only, tap its chip (for example **September · ₹800**) instead of **All**.

TIP If the parent pays more than the balance, the extra is kept as **Tuition paid in advance** and used for the next months.

The receipt: view, print and PDF (example: REC001314)

1. Click **Print receipt** in the green bar, or the printer icon in **Recent Collections**. The receipt opens in a new tab.



Office copy and Student copy on one A4 sheet. REC001314 covers three months, so the Month column shows August – October with the split Aug 400 · Sep 800 · Oct 800.

2. Choose a look in **Design**: 1 · Classic, 2 · Modern, 3 · Minimal (black & white), 4 · Royal, 5 · Compact, or Thermal 80 mm / Thermal 58 mm for a roll printer.

3. Choose **Office + Student (A4)** for two copies on one sheet, or **Single copy**.

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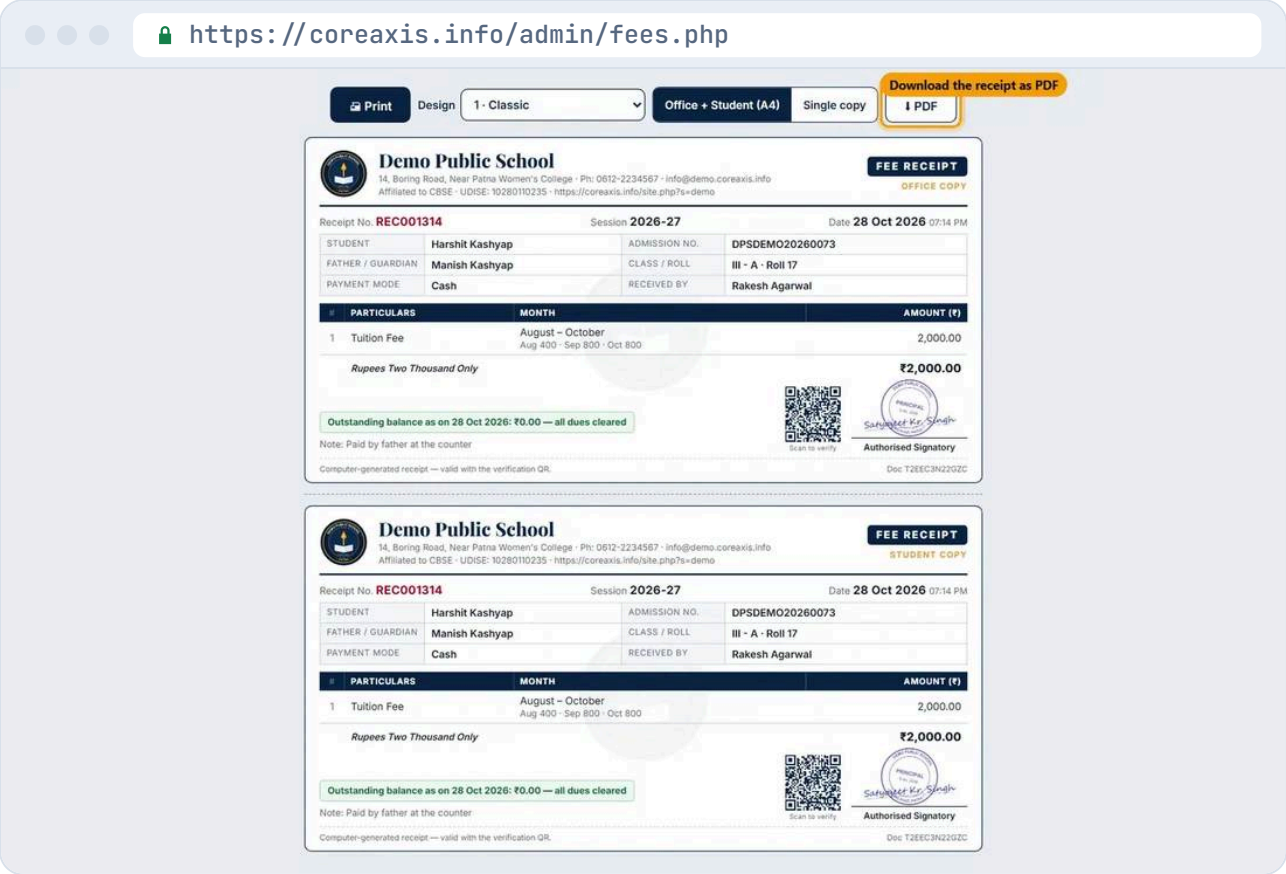
4 Click **Print** to print. To keep the receipt as a file or send it on WhatsApp / email, click **⬇ PDF**. The PDF downloads; it is the same file the parent gets in the portal and the app.



The ⬇ PDF button next to Print, Design and the copy choice.

5 Check the green line **Outstanding balance as on …** on the receipt. It tells the parent what is still due after this payment.

TIP The first office print is the ORIGINAL. Every later print is stamped DUPLICATE COPY – n and is logged in the Document Register.

TIP Parents see the same receipt in the parent portal and the app, where it has a **Download PDF** button. That copy is marked as a digital copy.

TIP The QR code on the receipt lets anyone check that the receipt is genuine.

Collect by UPI (example: Dhruv Srivastava, Class V-A, October ₹900)

Use this when the parent pays at the counter by scanning the school's UPI QR (demopublicschool@sbi) and shows you the success screen. If the parent pays from home and sends the UTR, use UPI / Bank Claims instead.

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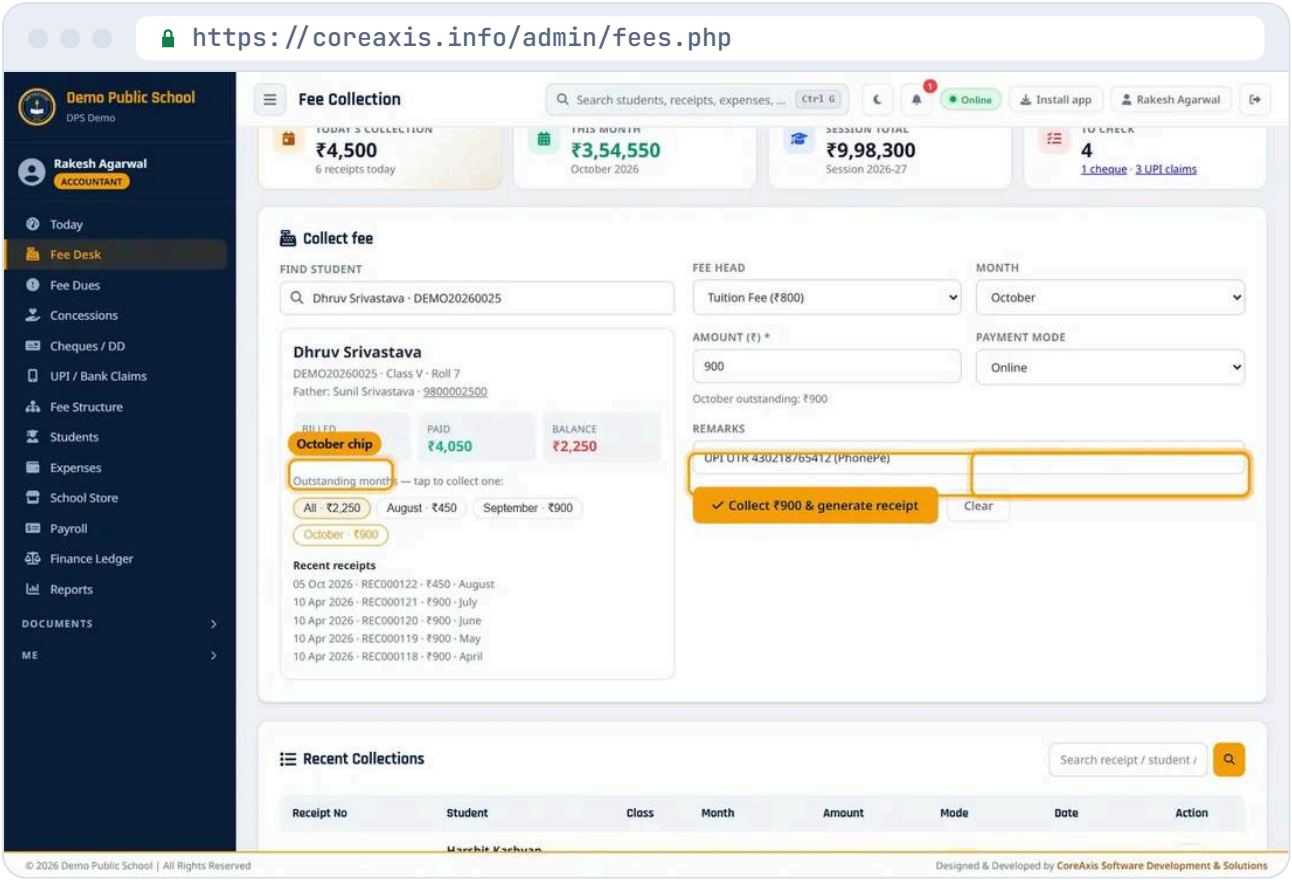
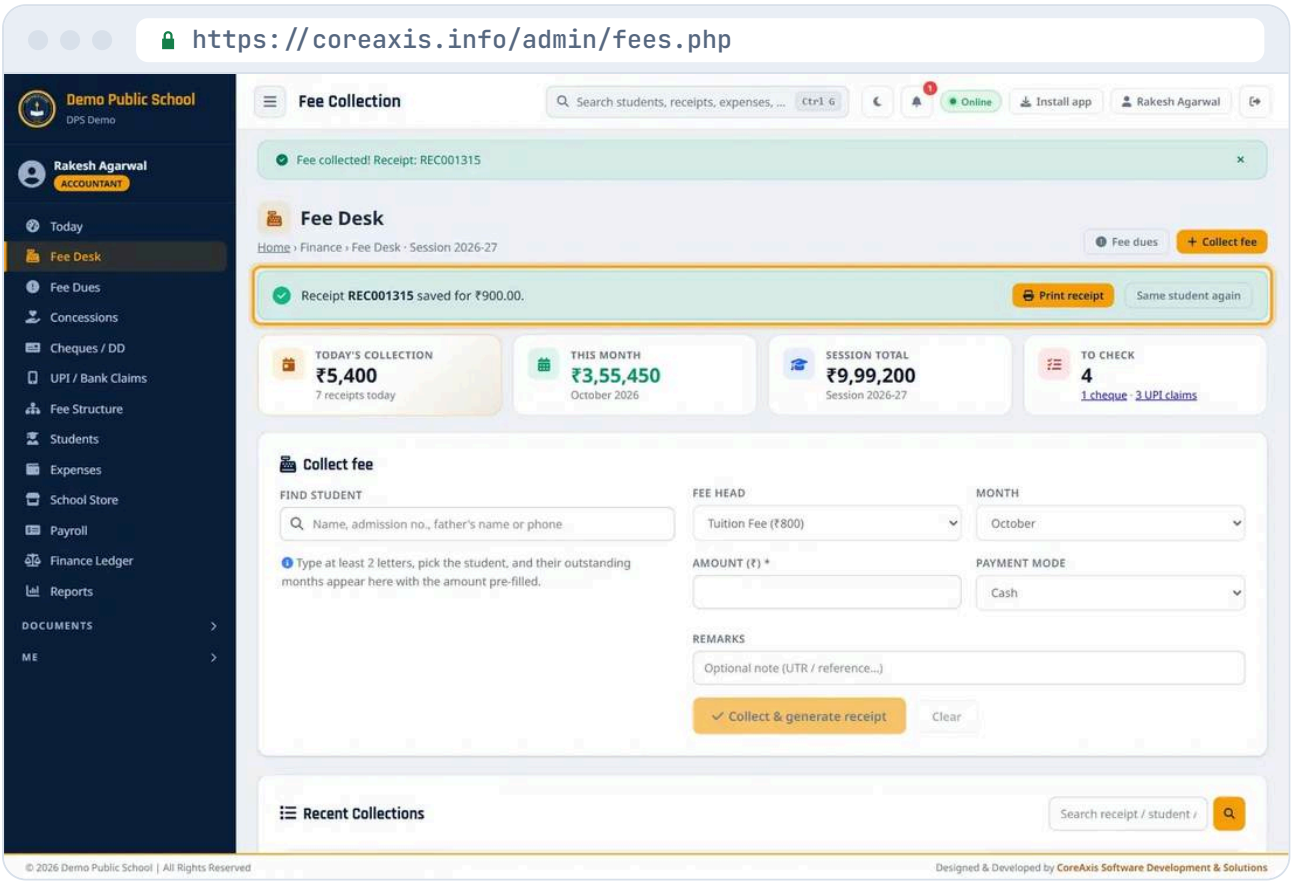
1. Search and pick **Dhruv Srivastava · DEMO20260025** (Class V).
2. Tap the **October · ₹900** chip. The month changes to October and the amount to 900.
3. Set **Payment mode** to **Online**.
4. Type the UTR from the parent's phone in **Remarks**, for example `UPI UTR 430218765412 (PhonePe)`.



October chip selected, mode Online and the UTR in Remarks.

5. Click **Collect ₹900 & generate receipt**, then **Confirm**.

6 Receipt **REC001315** is saved. Online receipts go to the Bank Book in the Finance Ledger.



UPI receipt saved.

TIP Always check the money has reached the school account (SMS or bank app) before you make an Online receipt.

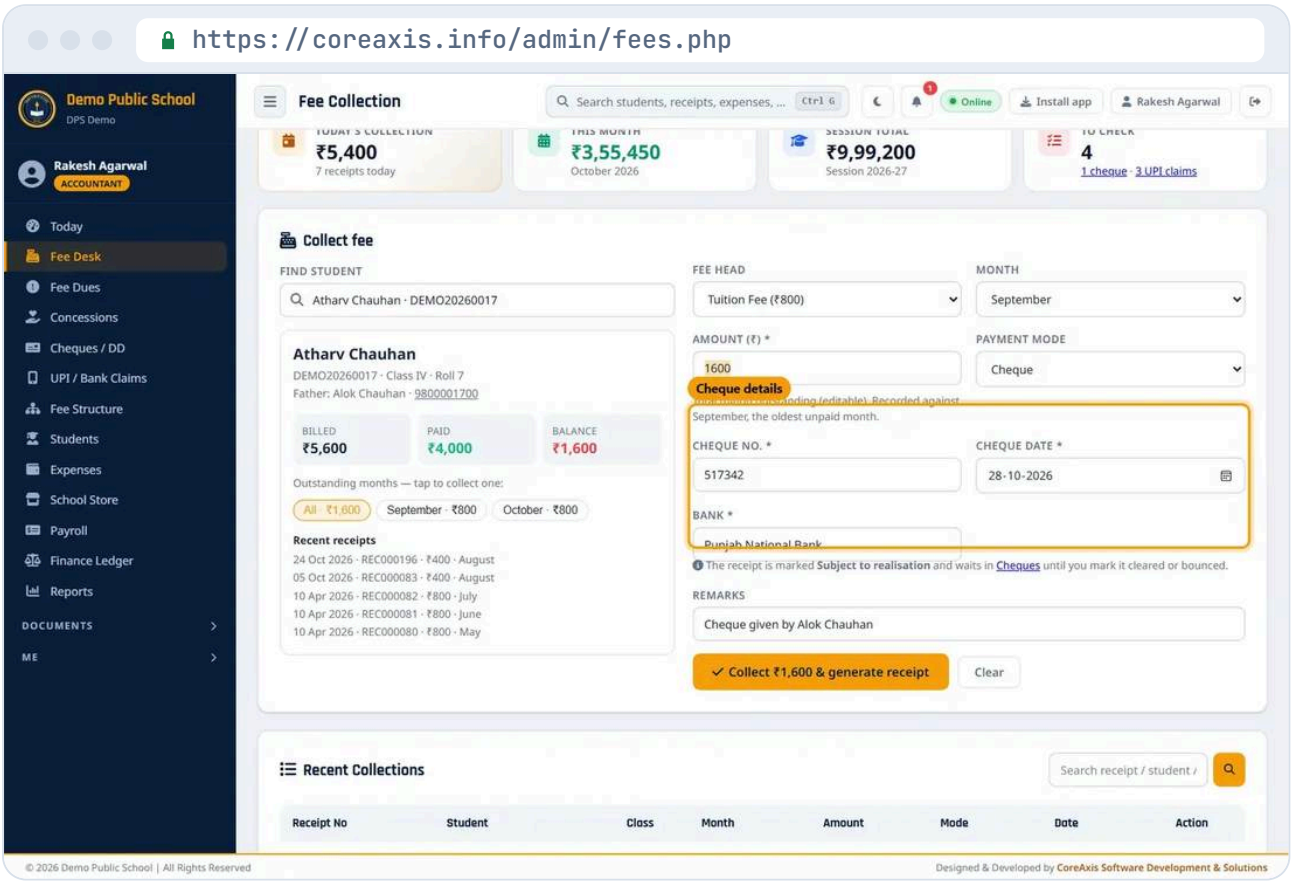
Collect by cheque (example: Atharv Chauhan, Class IV-A, ₹1,600 by cheque 517342)

1 Search and pick **Atharv Chauhan · DEMO20260017** (Class IV). The balance is ₹1,600 (September and October).

2 Leave **All · ₹1,600** selected.

3 Set **Payment mode** to **Cheque**. Three more boxes appear.

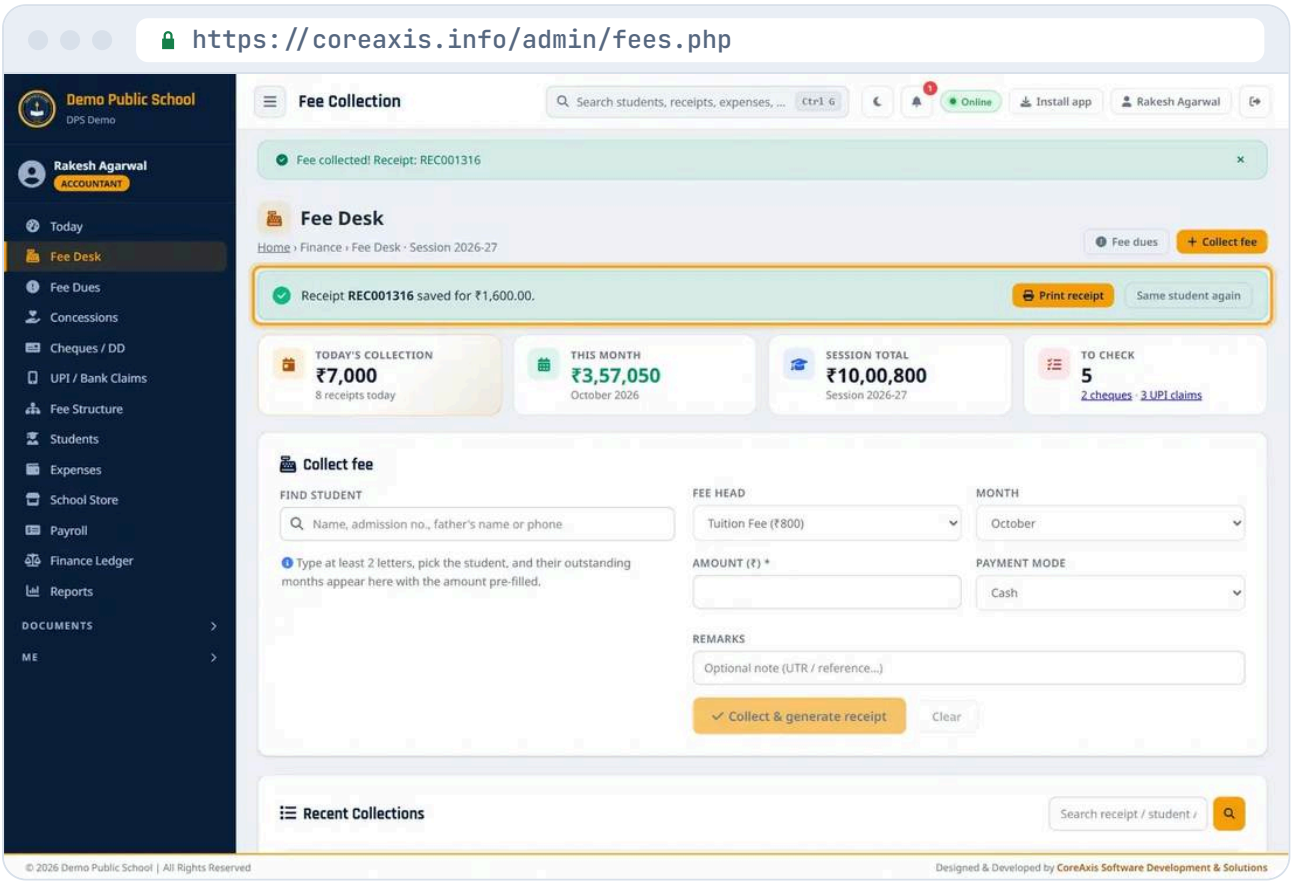
4 Type **Cheque no.** `517342`, set **Cheque date** to 28-10-2026 and choose **Bank** `Punjab National Bank` (start typing to pick from the list).



Cheque no., Cheque date and Bank are required for a cheque or DD.

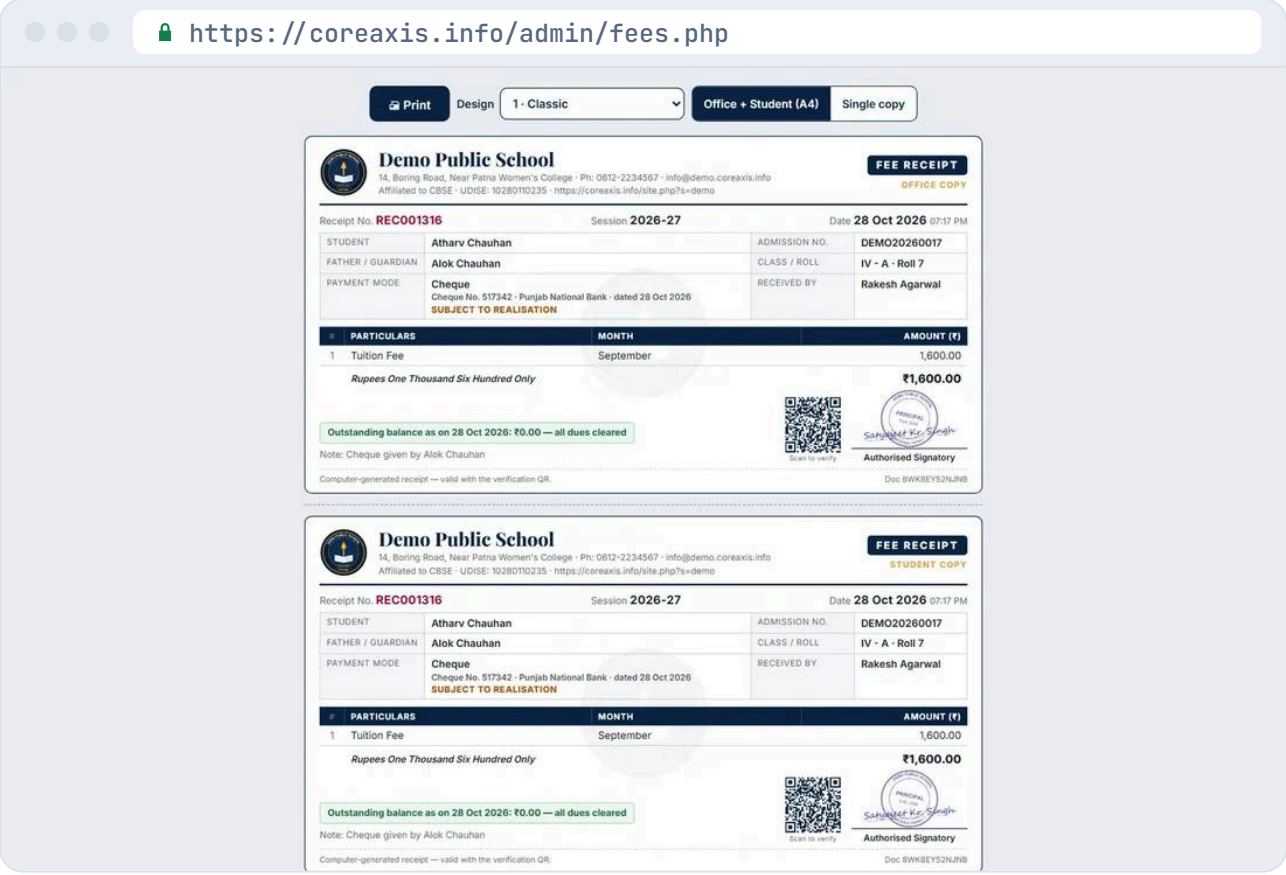
5 Add a note in **Remarks** if you like, for example `Cheque given by Alok Chauhan`.

6 Click **Collect ₹1,600 & generate receipt**, then **Confirm**. Receipt **REC001316** is saved.



The To check card now counts the new cheque.

7 Open the receipt. It shows the cheque details and **SUBJECT TO REALISATION**.



A cheque receipt is valid only after the bank clears the cheque.

8 When the bank statement shows the cheque, mark it **Cleared** in **Cheques / DD**. If it comes back unpaid, mark it **Bounced** (see the Cheques / DD chapter).

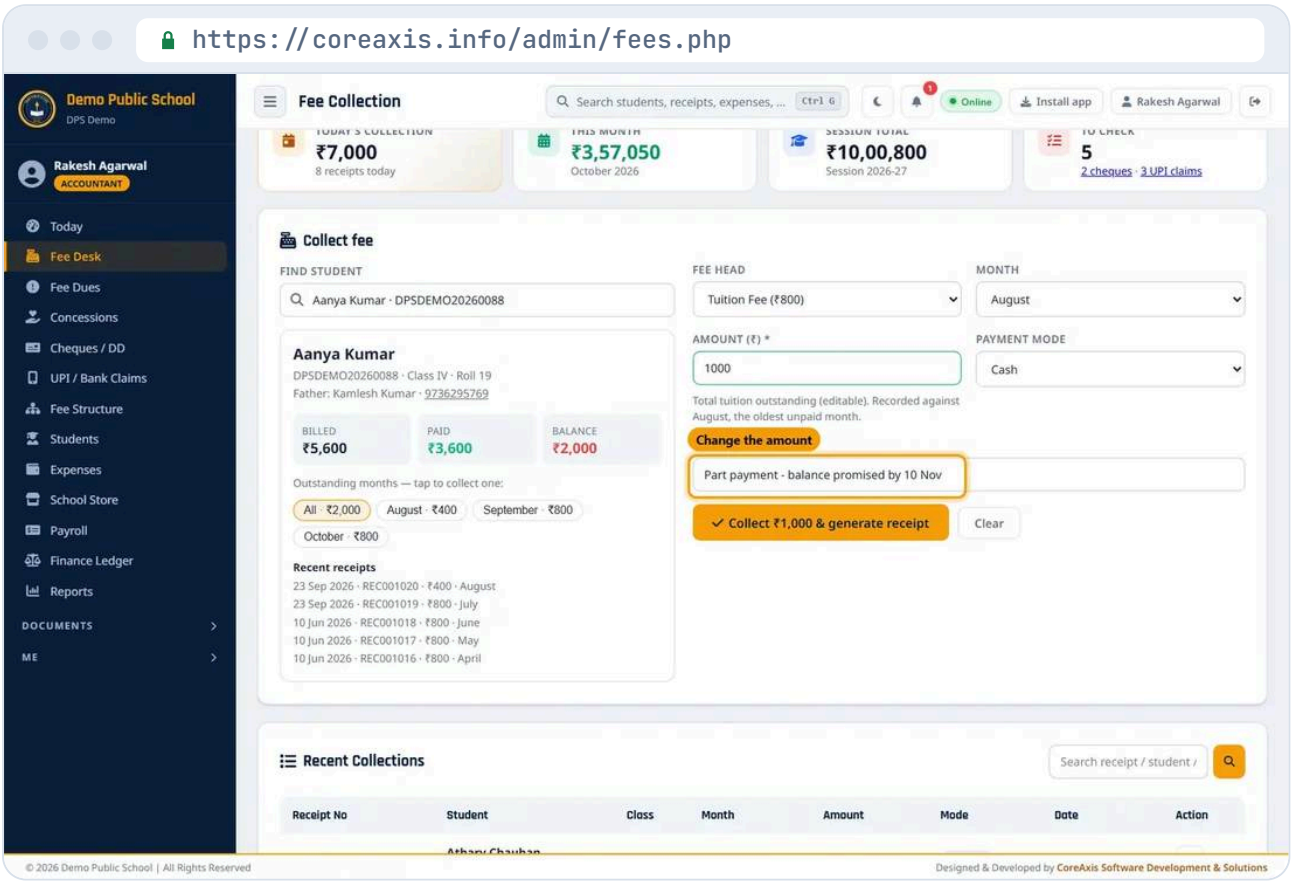
> **TIP** Choose **DD** for a demand draft. The boxes change to DD no. and DD date.

Take a part payment (example: Aanya Kumar, Class IV-A, pays ₹1,000 of ₹2,000)

1 Search and pick **Aanya Kumar · DPSDEMO20260088** (Class IV). The balance is ₹2,000.

2 Leave **All** selected and change **Amount (₹)** from 2000 to `1000`.

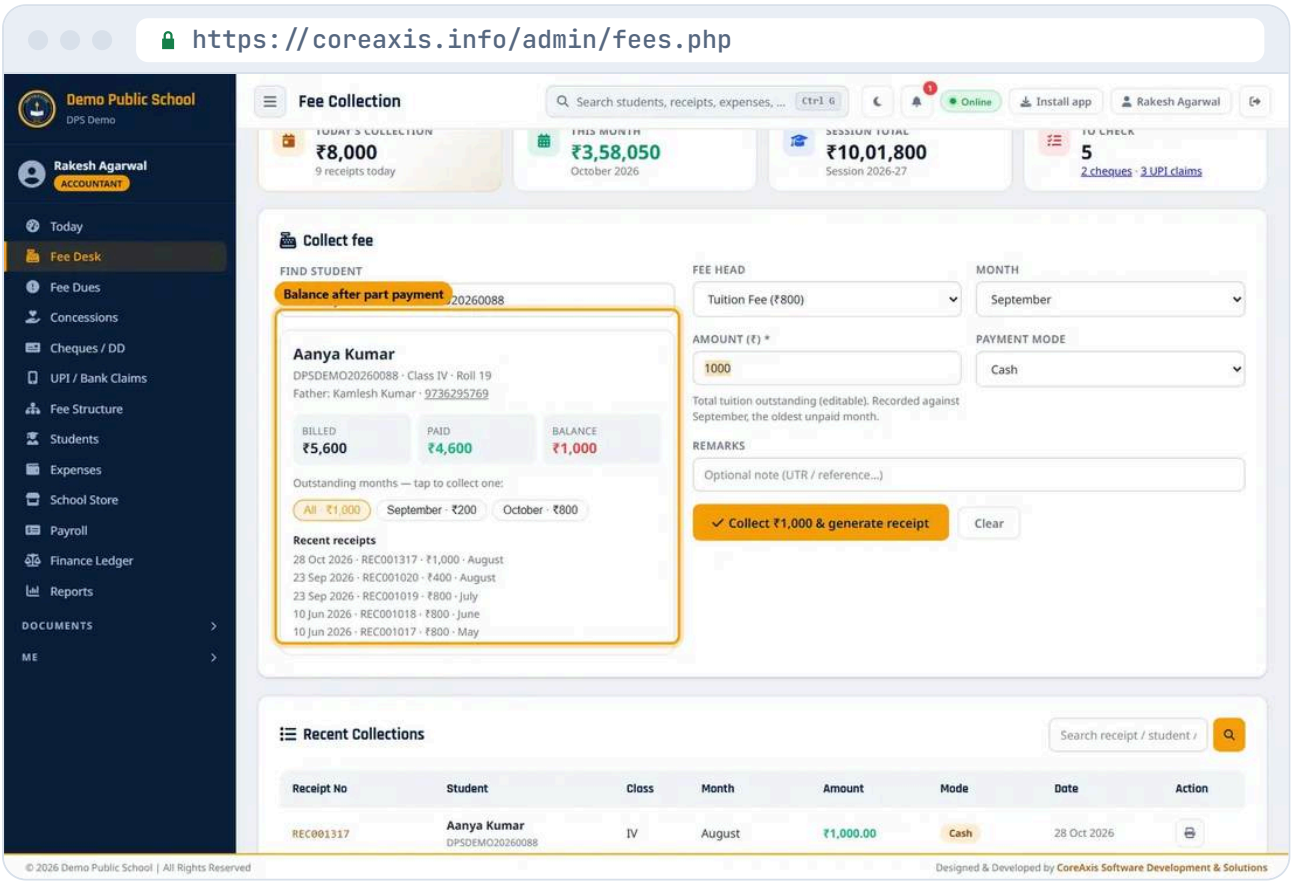
3 Keep **Cash** and write in **Remarks** `Part payment - balance promised by 10 Nov`.



Change the amount for a part payment.

4 Click **Collect ₹1,000 & generate receipt**, then **Confirm**. Receipt **REC001317** is saved.

5 Search the student again. The balance is now ₹1,000: September ₹200 and October ₹800. The ₹1,000 cleared the oldest month first.



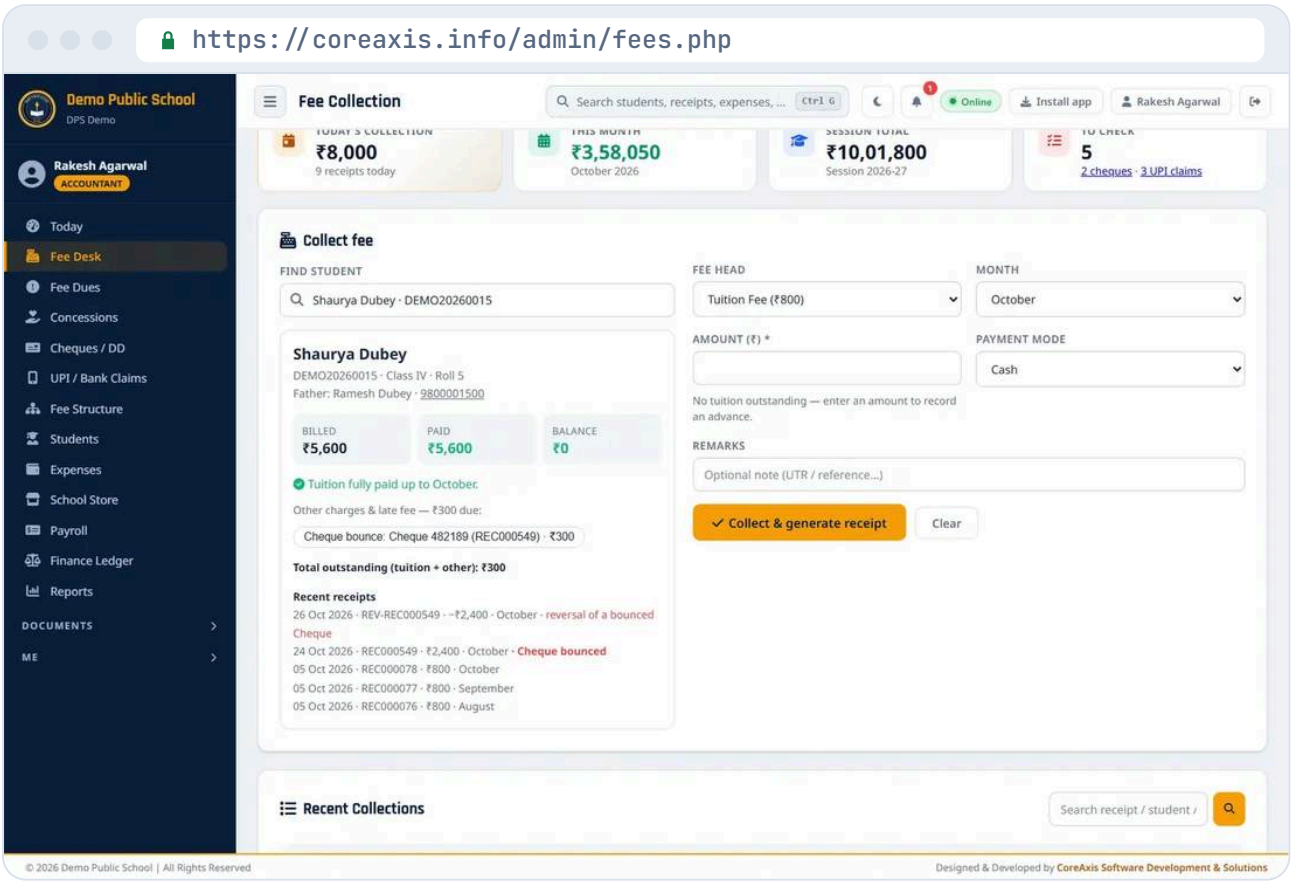
After the part payment only ₹1,000 is still due.

TIP The receipt prints the new outstanding balance, so the parent knows what is left.

Other charges, late fee and concessions on the card (examples: Shaurya Dubey, Kabir Sharma)

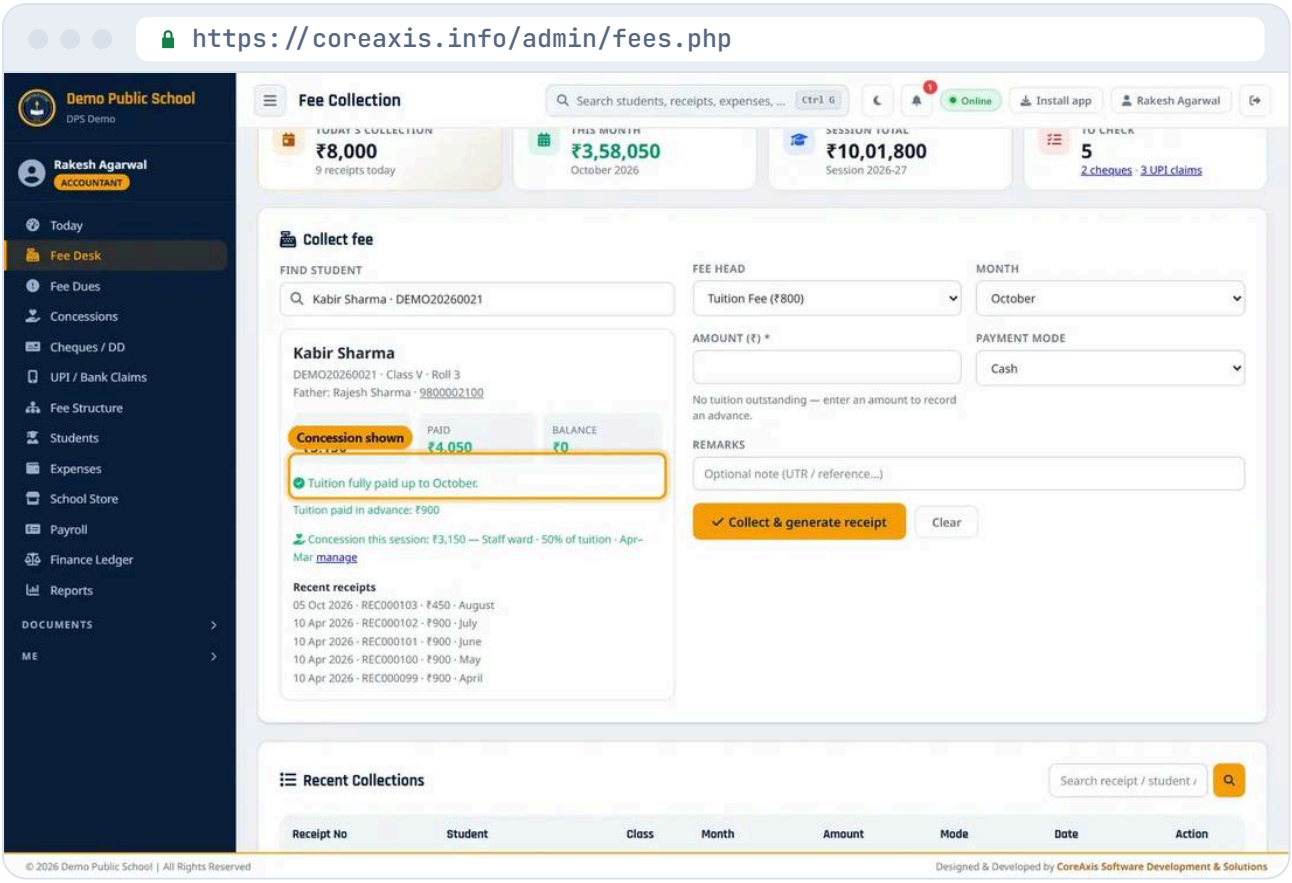
The card shows everything a student owes, not only tuition.

1 Shaurya Dubey (Class IV-A) has paid all tuition, but his cheque 482189 bounced. The card shows **Other charges & late fee — ₹300 due** with the chip **Cheque bounce: Cheque 482189 (REC000549) · ₹300**. His recent receipts show the bounced cheque and its reversal in red. Tap the chip to collect the charge: the fee head changes to Cheque Bounce Charges.



A bounce charge listed under Other charges & late fee.

2 Kabir Sharma (Class V-A) is a staff ward. The green line **Concession this session: ₹3,150 — Staff ward · 50% of tuition · Apr–Mar** shows the concession already taken off the billed tuition. Click **manage** to open Concessions.

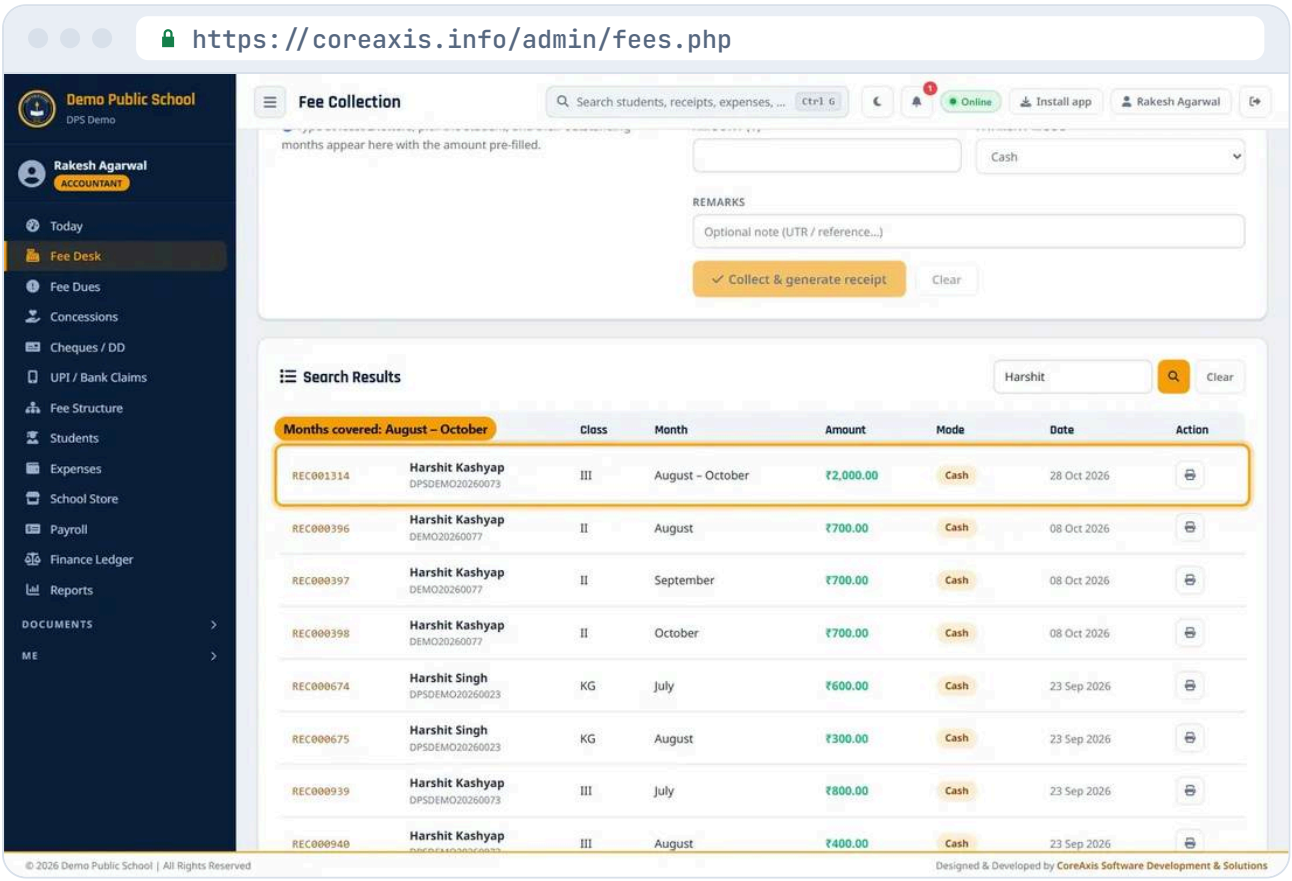


Concession shown on the student card.

3 When the school switches on a late fee (Fee Structure › Late fee & bounce), each late month adds a **Late Fee** chip under Other charges. In the demo school the late fee is off.

Find an old receipt and what the Admin can do extra

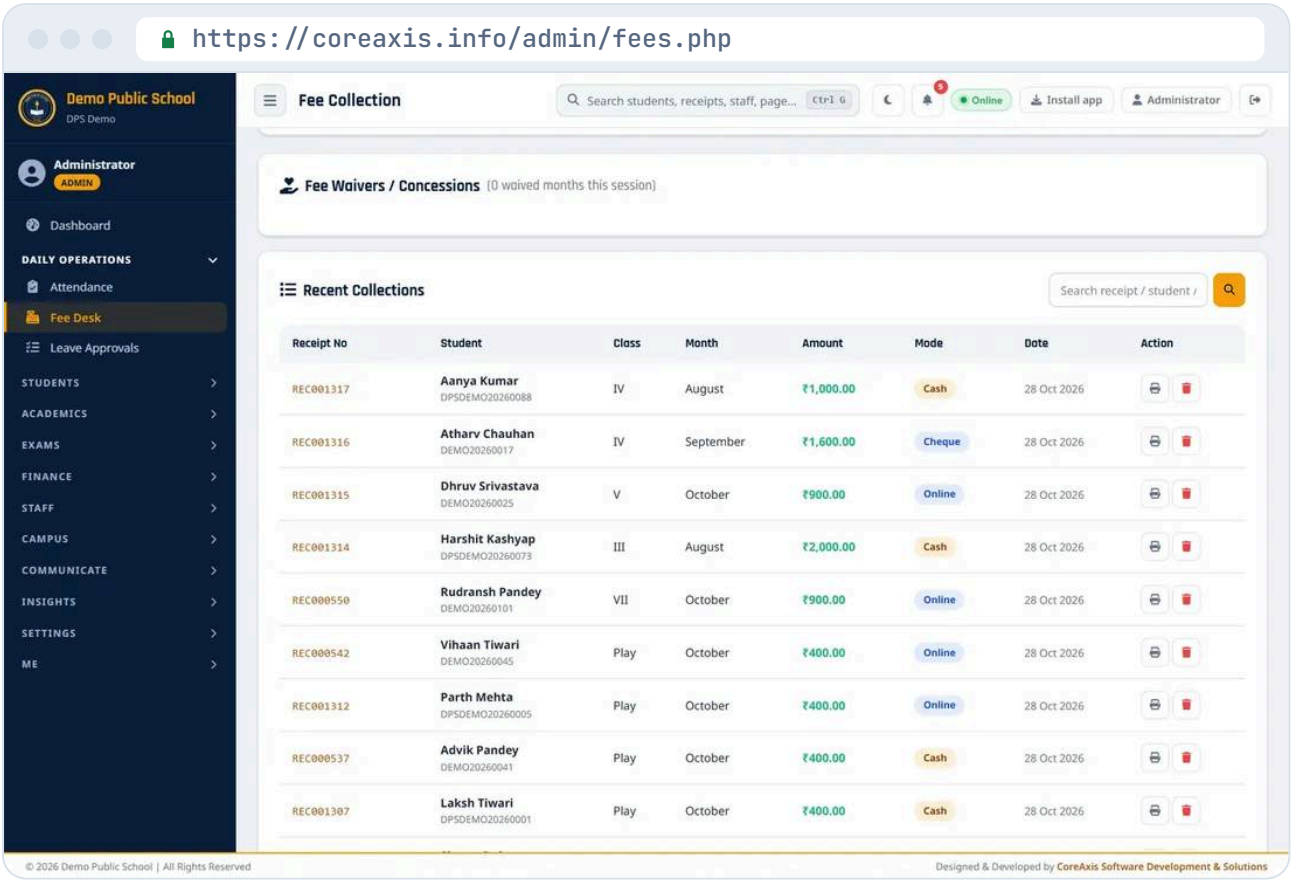
1 In **Recent Collections**, type a receipt no., student name or admission no. in the search box and click the search button.



Search results for "Harshit". REC001314 shows the months it covers: August – October.

2 Click the printer icon on a row to open that receipt again (it prints as a DUPLICATE COPY).

3 Admin and Principal see a red bin icon on each row to delete a wrong receipt, and a **Fee Waivers / Concessions** panel to waive a billed month with a reason. Accountants do not see these.



Admin view: waiver panel and delete icons.

IMPORTANT Deleting a receipt cannot be reversed and puts the amount back into the student's dues. For a bounced cheque, do not delete the receipt: mark the cheque Bounced in Cheques / DD.

Questions

A parent paid twice by mistake. What do I do?

The second payment is kept as an advance and is used for the next months automatically. If the parent wants the money back, ask the Admin / Principal to delete the extra receipt after you return the cash.

Two students have the same name. How do I pick the right one?

The search list shows the admission no., class, father's name and phone for each student. Check these before you pick.

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I collected three months in one payment. What does the receipt show?

One receipt with the month range, for example August – October, and the split per month under it (Aug 400 · Sep 800 · Oct 800). The same range shows in Recent Collections, on the accountant's Today page and in the parent portal. The payment settles the oldest unpaid month first.

Can an accountant delete or edit a receipt?

No. Only Admin / Principal can delete a receipt. An accountant who made a mistake should ask the Admin.

Where does the money go in the accounts?

Cash receipts go to the Cash Book, Online / Cheque / DD receipts to the Bank Book. Both are in Finance Ledger.

How do I collect an exam form fee?

When the office submits an exam form with a fee (Exams › Exam Form Apply), the fee is added to the student's account. At the Fee Desk it shows under Other charges & late fee as "Exam form fee: <exam name>". Tap the chip to collect it; the fee head changes to Exam Form Fee.

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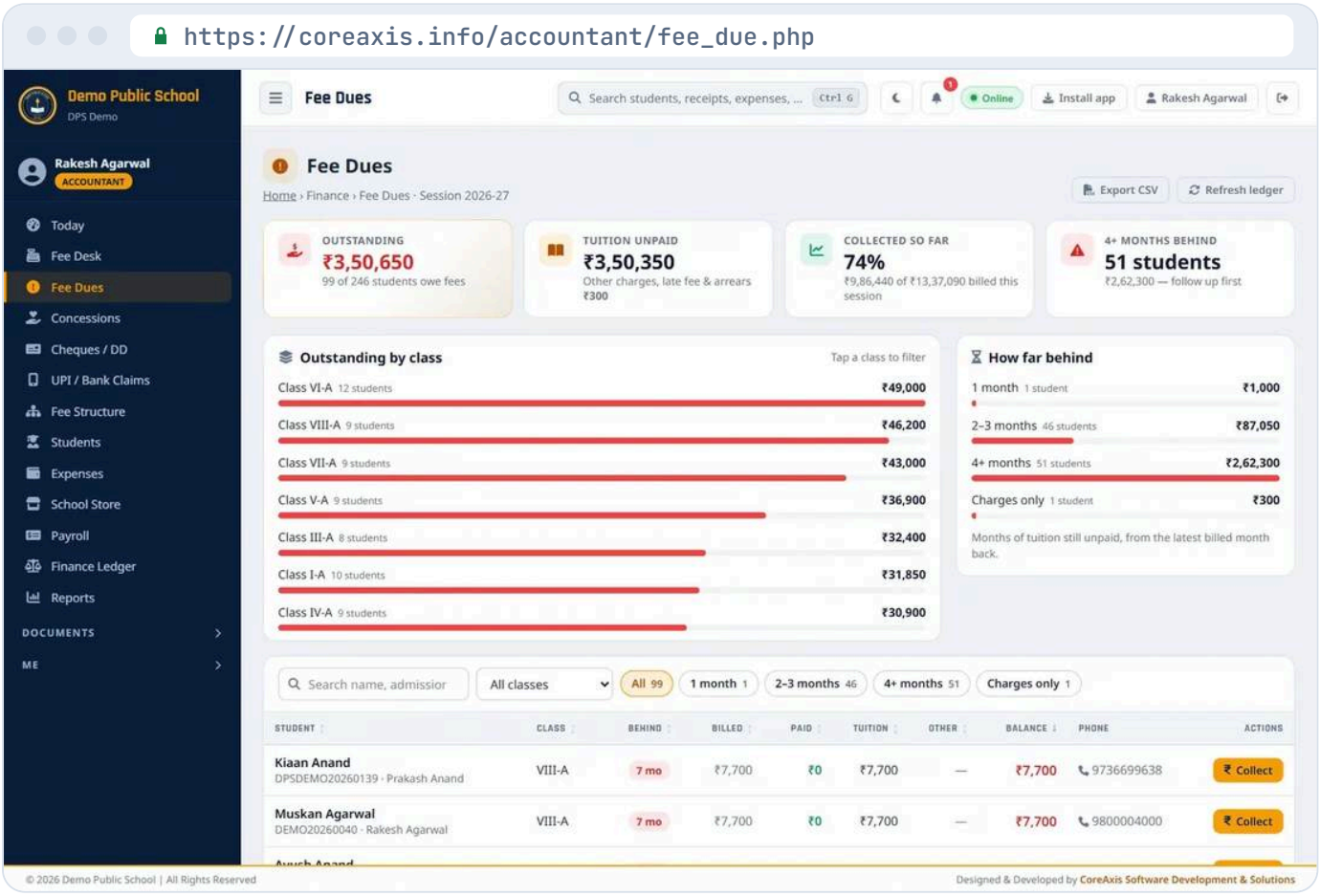
FINANCE · CHAPTER 25

Fee Dues

Admin Principal Accountant MENU Finance › Fee Dues (Accountant: Fee Dues)

Fee Dues is the defaulter list. It shows every student with an unpaid balance in the running session, how many months behind they are and their parent's phone. Use it to plan follow-up calls, send reminder SMS and jump to the Fee Desk to collect.



Fee Dues — Demo Public School

Screen at a glance

Outstanding	Total unpaid in the session and how many students owe fees, for example ₹3,50,650 — 99 of 246 students.
Tuition unpaid	The tuition part of the outstanding amount. The line below shows other charges, late fee and arrears.

Collected so far	Percentage of the billed amount that has been collected this session.
4+ months behind	Students who have not paid tuition for four or more months, with their total. Follow these up first.
Outstanding by class	One bar per class with the amount and number of students. Click a class to filter the list.
How far behind	Age buckets: 1 month, 2–3 months, 4+ months, Charges only (tuition paid, only other charges due).
Search box	Filter the list by name, admission no., father or phone.
Class	Show one class only.
Bucket chips (All, 1 month, 2–3 months, 4+ months, Charges only)	Show only students in that age bucket. The number on each chip is the count.
Columns	Student (with admission no. and father), Class, Behind (months unpaid), Billed, Paid, Tuition, Other, Balance, Phone, Actions. Click a column heading to sort.
Collect	Opens the Fee Desk with this student already loaded.
Export CSV	Downloads the list (the selected class only, if a class is chosen) as a spreadsheet file.
Refresh ledger	Re-checks every student's dues: bills missing months and re-syncs payments, charges, late fee and arrears. Months already billed keep their price. Use it after changing the fee structure.

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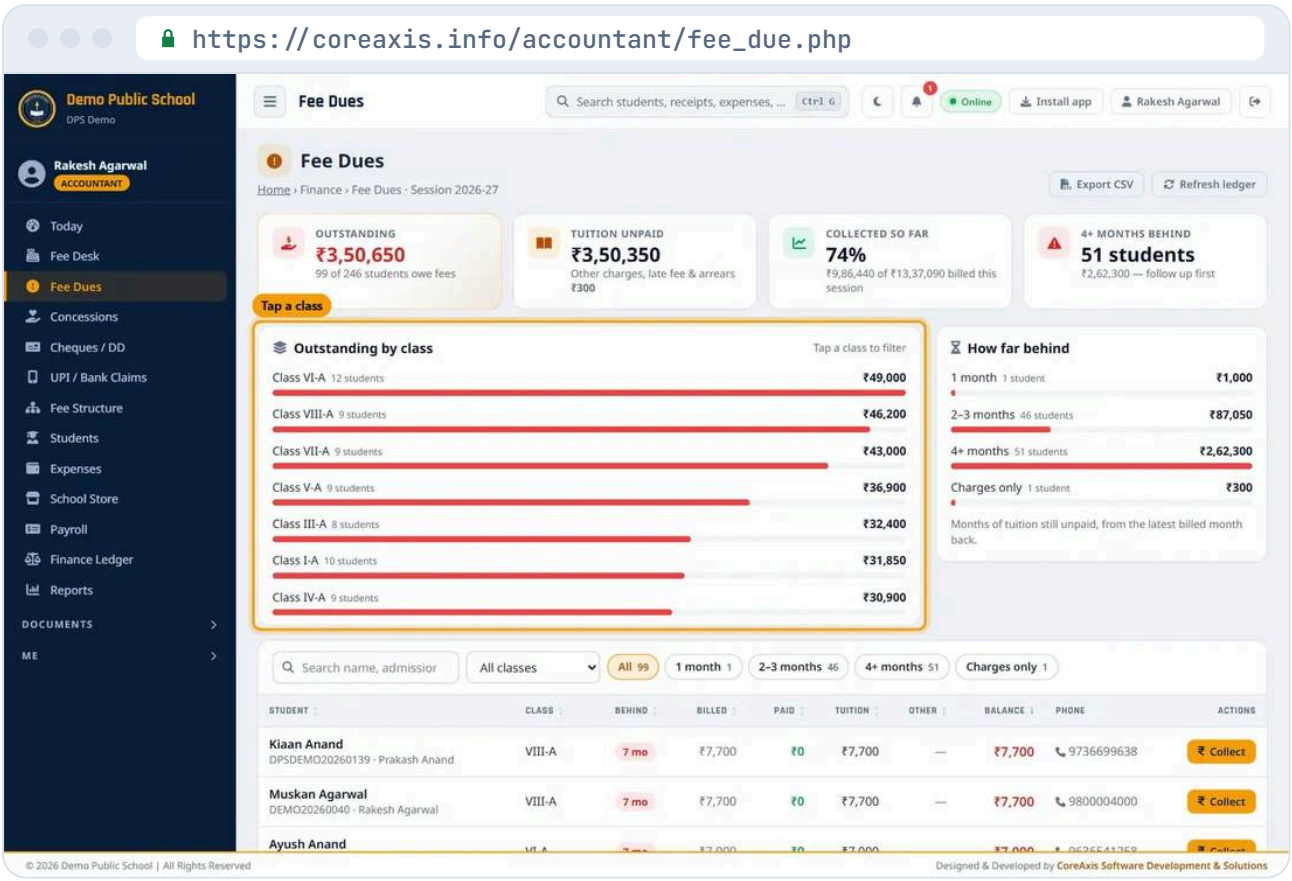
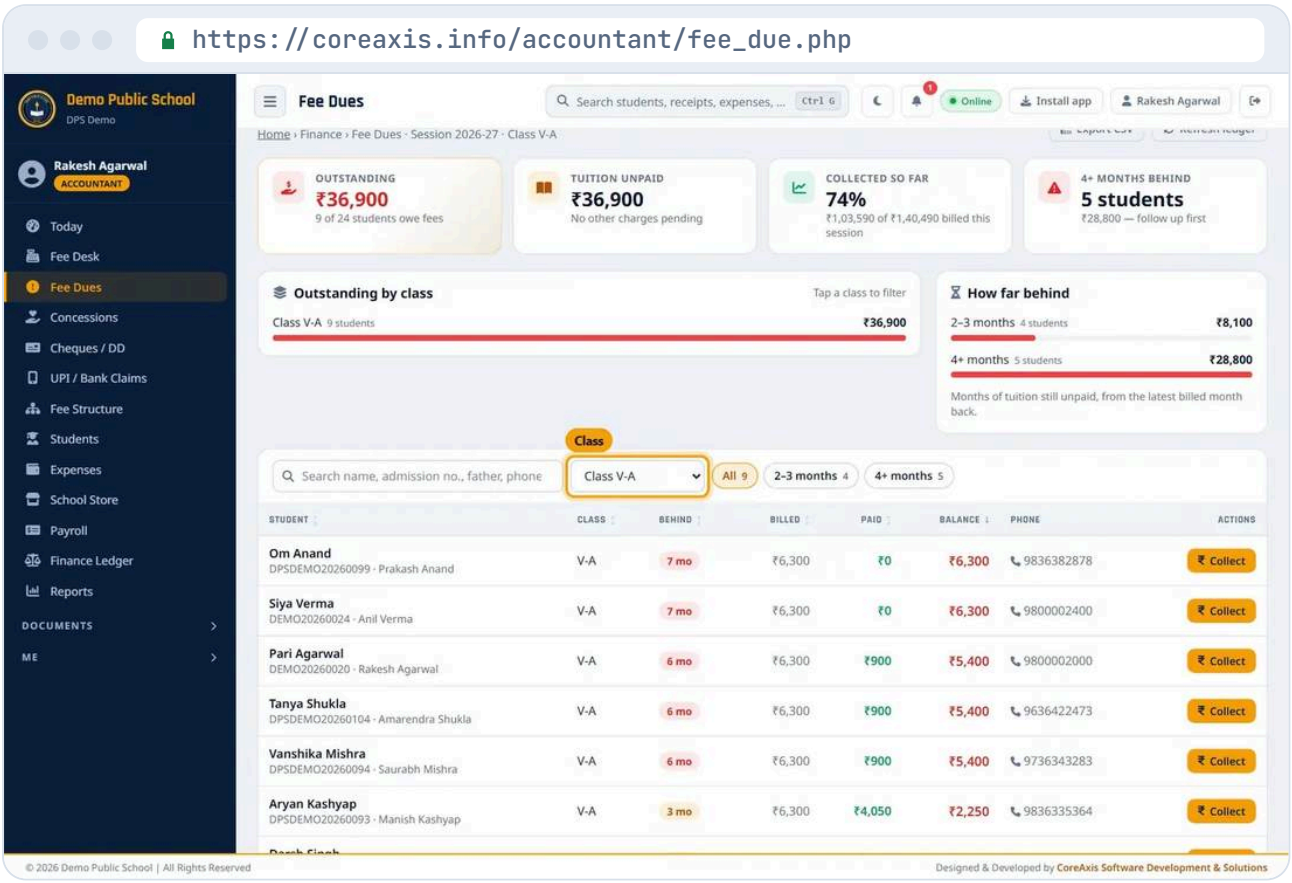
Find the defaulters of one class (example: Class V-A, 4+ months behind)

1 Open **Fee Dues** from the menu. Look at **Outstanding by class** to see which class owes the most.



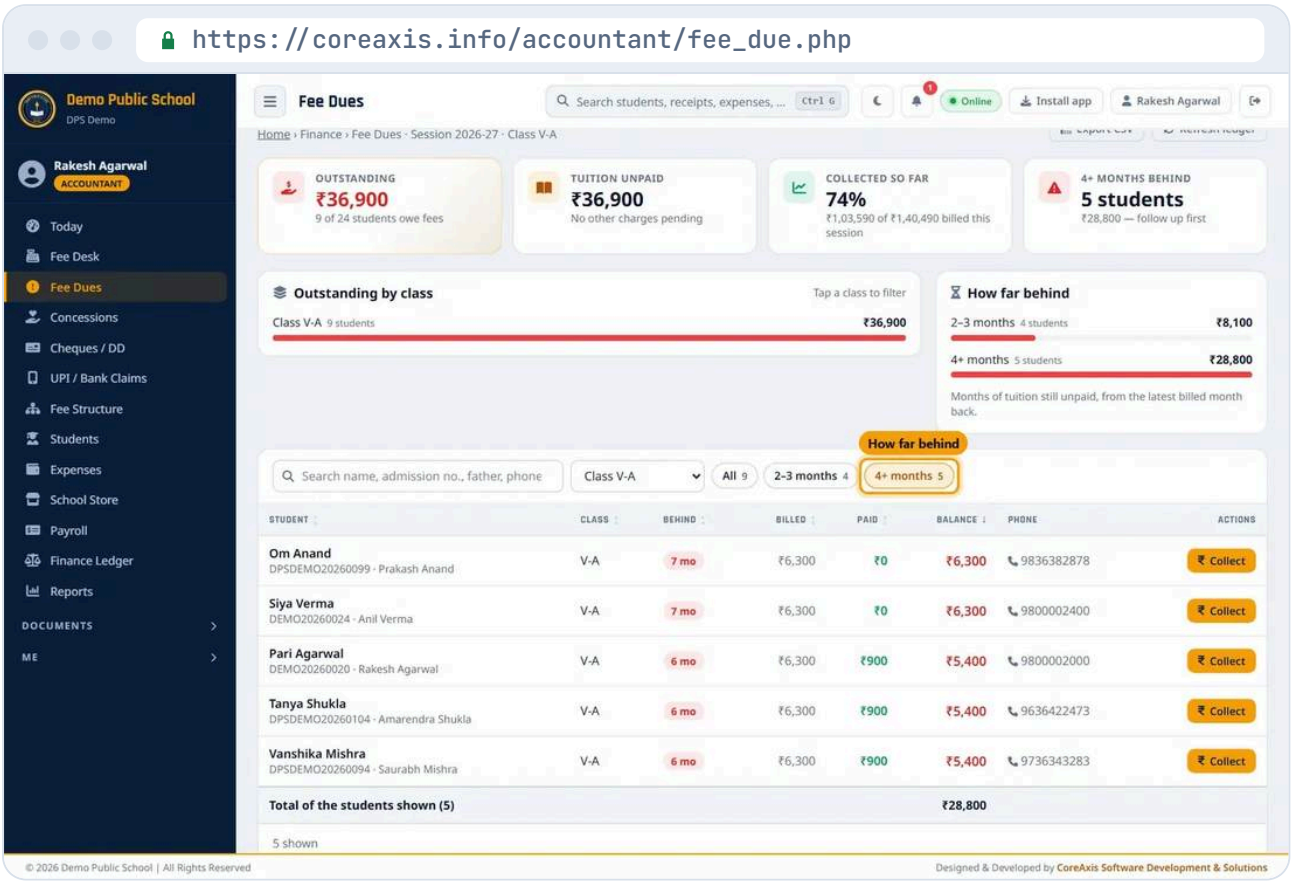
Click a class bar to filter the list.

2 Choose **Class V-A** in the class box (or click its bar). The cards now show only Class V-A: ₹36,900 outstanding, 9 of 24 students.



The list filtered to Class V-A.

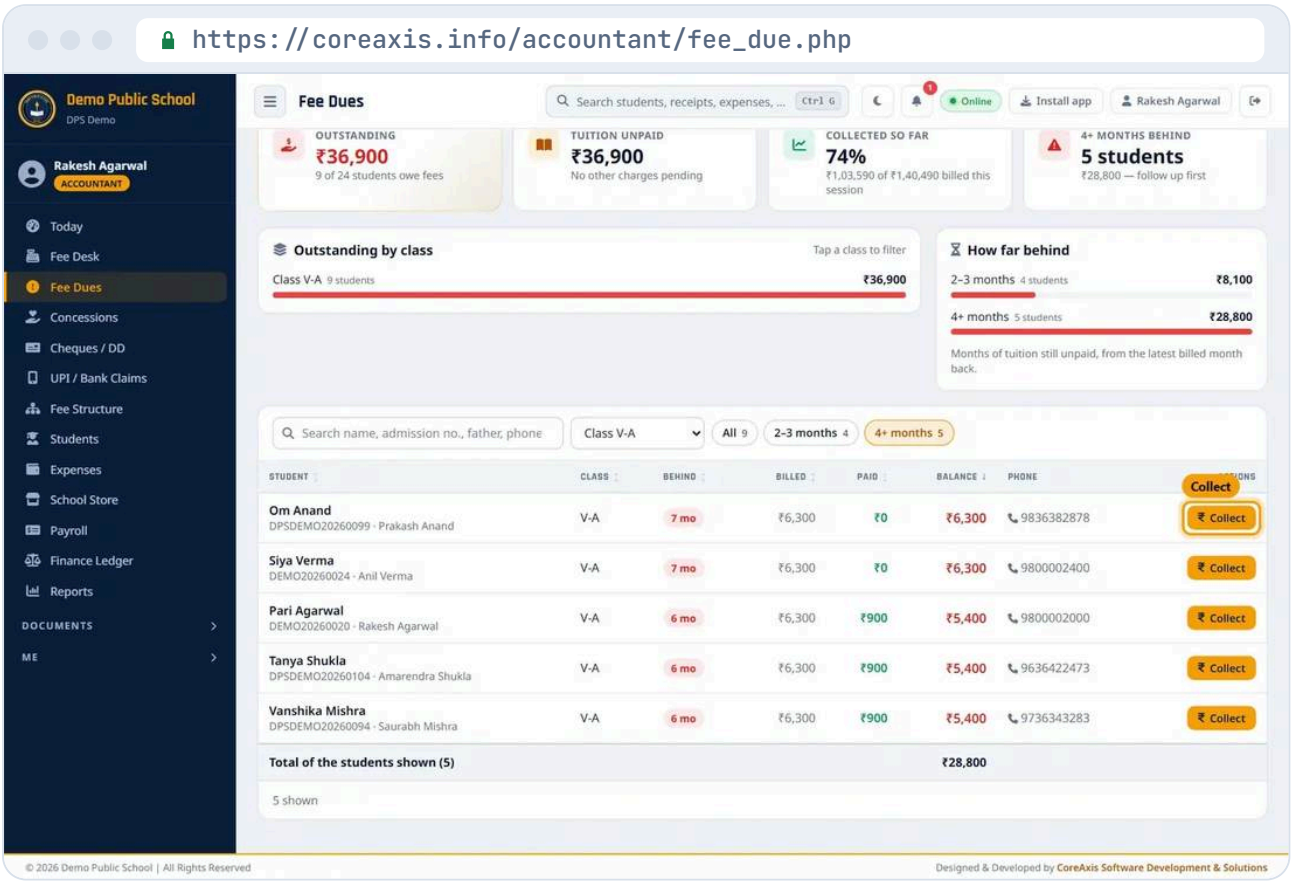
3 Click the **4+ months** chip. Five students remain, for example Om Anand and Siya Verma (7 months, ₹6,300 each).



Only students 4 or more months behind.

4 Call the parent using the number in the **Phone** column.

5 When the parent comes to pay, click **Collect** on that row. The Fee Desk opens with the student's dues loaded.

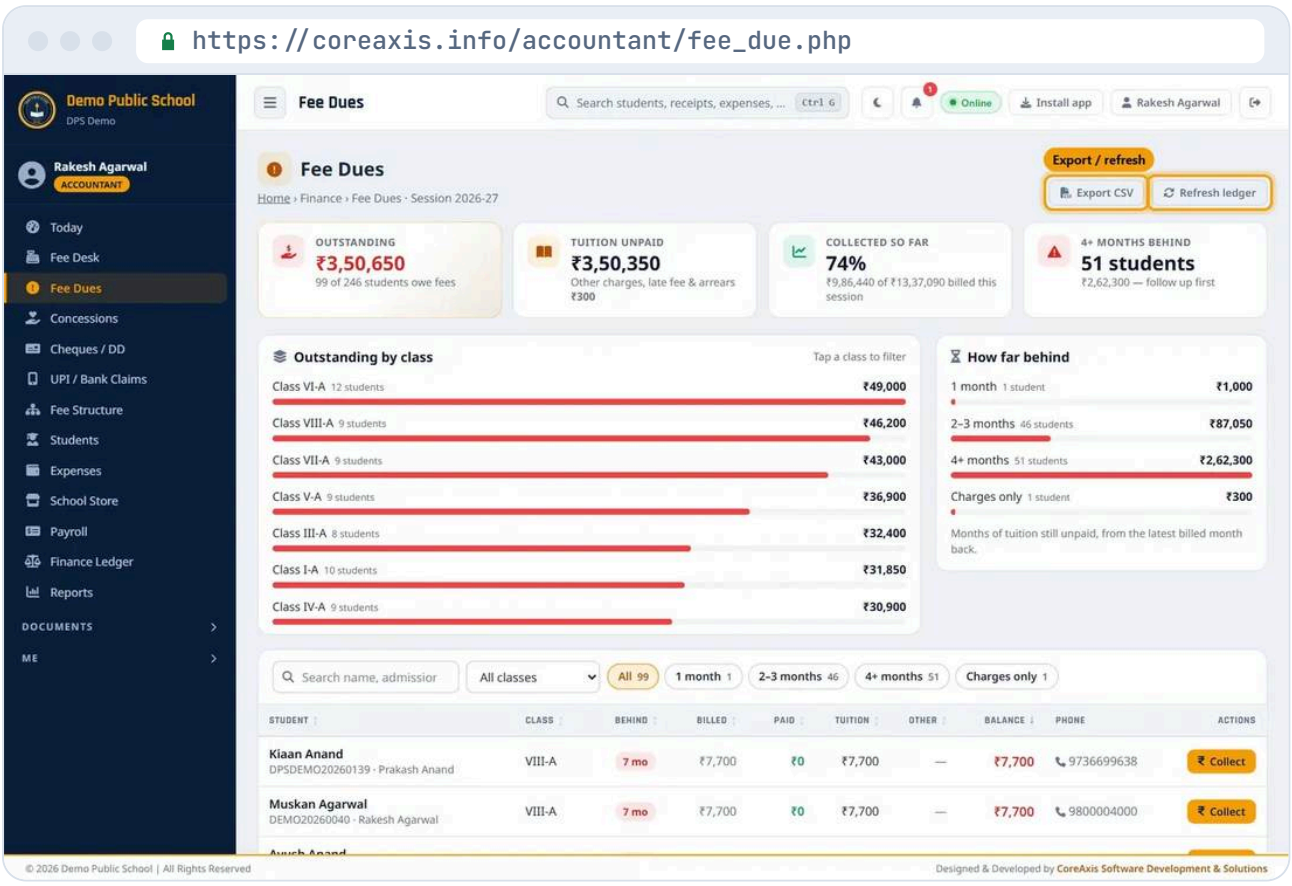


Collect opens the Fee Desk for that student.

TIP Siya Verma's row still shows full dues because her ₹300 per month concession is waiting for the principal's approval. Once approved, her dues go down.

Export the list or refresh the ledger

1. Choose a class first if you want only that class.



Export CSV and Refresh ledger at the top right.

2. Click **Export CSV**. A file downloads that opens in Excel or Google Sheets.
3. If the dues look out of date (for example after changing a class fee), click **Refresh ledger** and then **Confirm**.

Send SMS reminders

The SMS buttons appear only after the school has set up an SMS gateway in Communicate › SMS (Configuration tab). The demo school has SMS switched off, so the buttons are not visible in the screenshots.

1. Ask the Admin to set up and enable SMS in **SMS › Configuration**.
2. Open **Fee Dues** and filter the class or bucket you want.
3. To remind one parent, click the SMS icon on that row.
4. To remind several parents, tick the box at the start of their rows and click **SMS selected (n)**.

5 To remind everyone in the list, click **SMS all**.

6 Confirm the popup. Messages go out in the background; a progress bar shows the batch. Anyone already reminded today is skipped.

TIP The message text is the Fee Reminder template in SMS › Templates, for example: "Dear Parent, fee of Rs.[AMOUNT] is pending for [STUDENT NAME] ...".

IMPORTANT Each SMS costs money on your SMS account. Check the filter before clicking SMS all.

Questions

A student paid but still shows in Fee Dues.

Check the payment was made for the right student in Fee Desk › Recent Collections. If it was paid by cheque and the cheque bounced, the months fall due again. If it still looks wrong, click Refresh ledger.

What does Charges only mean?

The student's tuition is fully paid, but another charge is due, for example a cheque bounce charge or transport fee.

Why does a student show '7 mo' in October?

Tuition from April to October (7 months) is unpaid.

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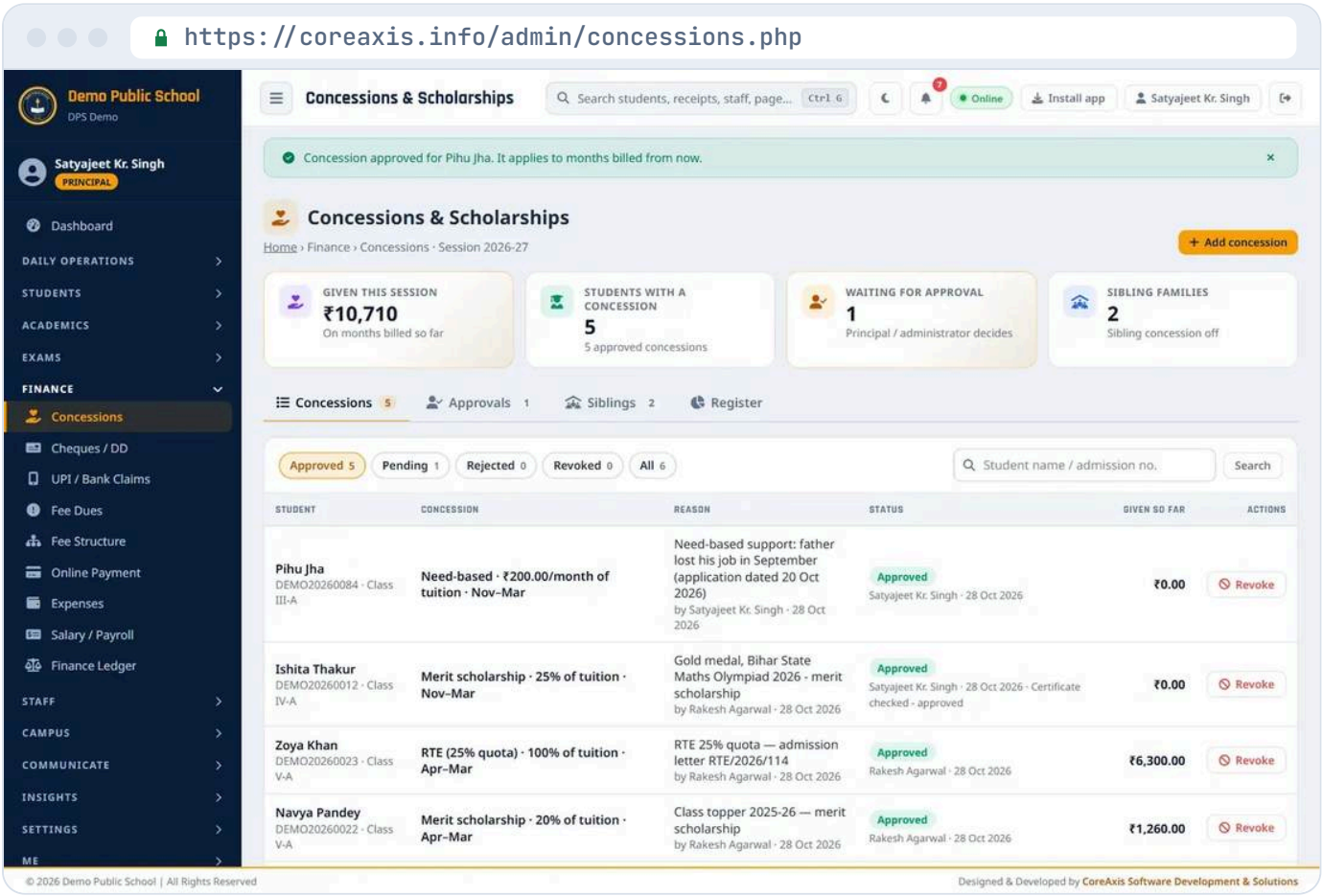
FINANCE · CHAPTER 26

Concessions

Admin Principal Accountant MENU Finance › Concessions (Accountant: Concessions)

A concession lowers a student's fee for chosen months: a percent or a fixed amount off tuition, one fee head or all charges. The accountant can propose a concession; it applies only after the Principal or Admin approves it. The same page links brothers and sisters and runs the sibling concession, and its Register tab shows how much was given this session.



Concessions — Demo Public School

Screen at a glance

Given this session	Total concession on the months billed so far.
Students with a concession	Number of students with an approved concession.
Waiting for approval	Concessions the Principal / Admin has not yet decided.

Sibling families	Number of linked families, and whether the sibling concession is on or off.
Concessions tab	All concessions with status chips: Approved, Pending, Rejected, Revoked, All. Search by student name or admission no.
Approvals tab	Pending concessions with Approve / Reject buttons (Admin / Principal only).
Siblings tab	Sibling concession setting, Link siblings and the list of linked families.
Register tab	Amount given this session by type (staff ward, RTE, merit …) with student count and share.
Columns	Student, Concession (type, value, months), Reason (and who entered it), Status (and who decided), Given so far, Actions (Approve, Reject, Revoke).

Add a concession as accountant (example: Ishita

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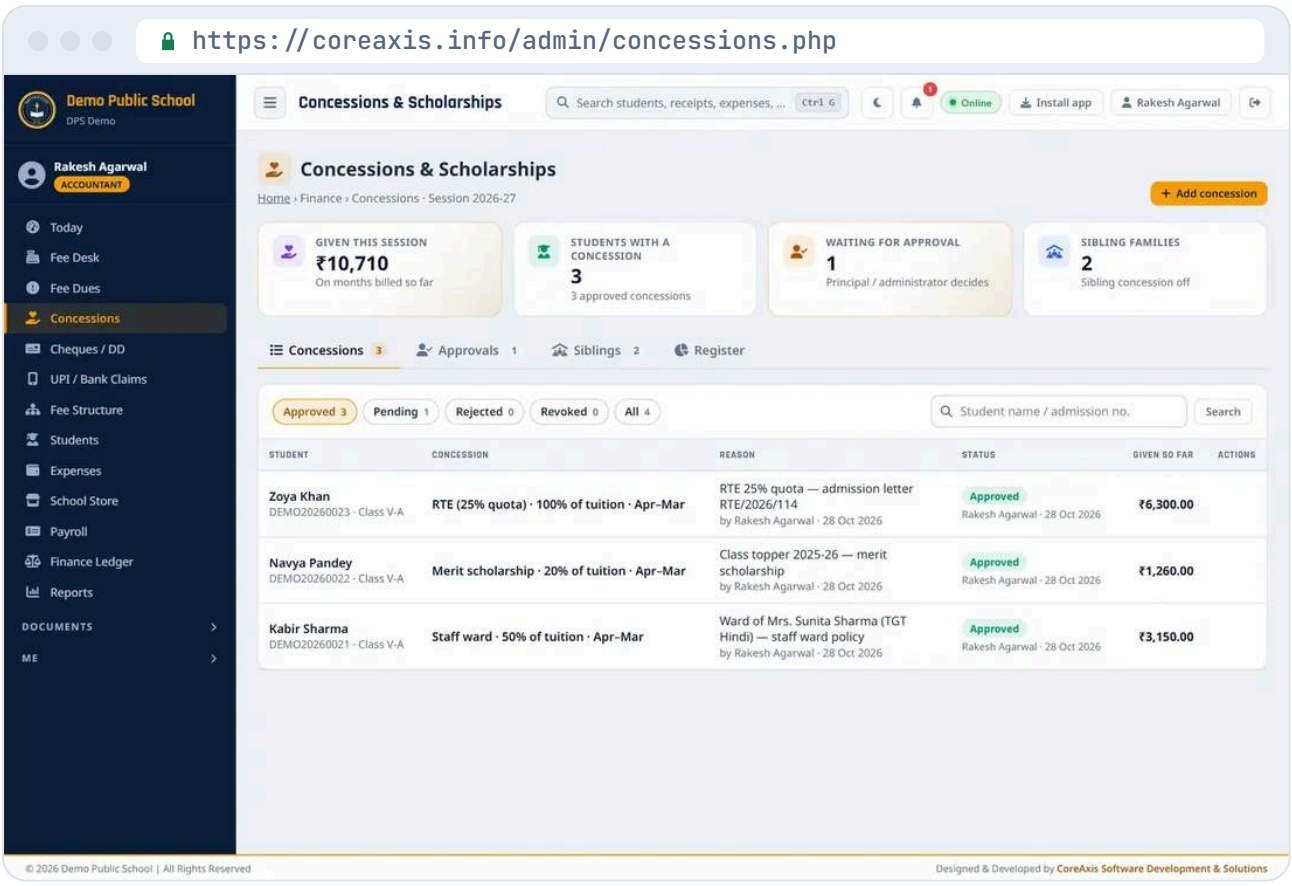
Thakur, Class IV-A, 25% merit scholarship, Nov–Mar)

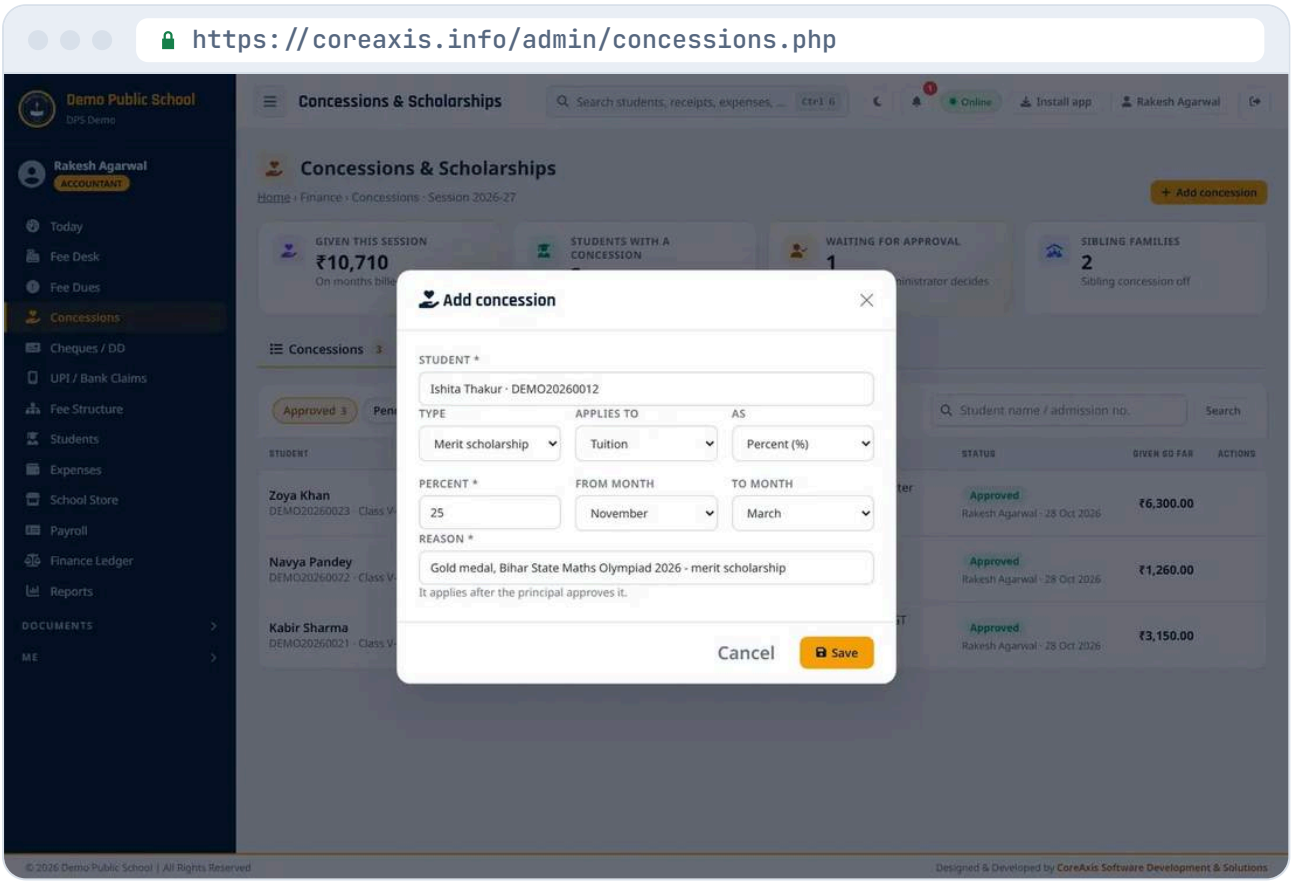
1. Open **Concessions** and look at the list of current concessions.



Concessions page as seen by the accountant.

2. Click **Add concession**, then **Yes, add** in the popup.
3. In **Student**, type `Ishita Thakur` and pick **Ishita Thakur · DEMO20260012** (Class IV).
4. Set **Type** to **Merit scholarship**, **Applies to** to **Tuition** and **As** to **Percent (%)**.
5. Type `25` in **Percent**.
6. Set **From month** to **November** and **To month** to **March**.

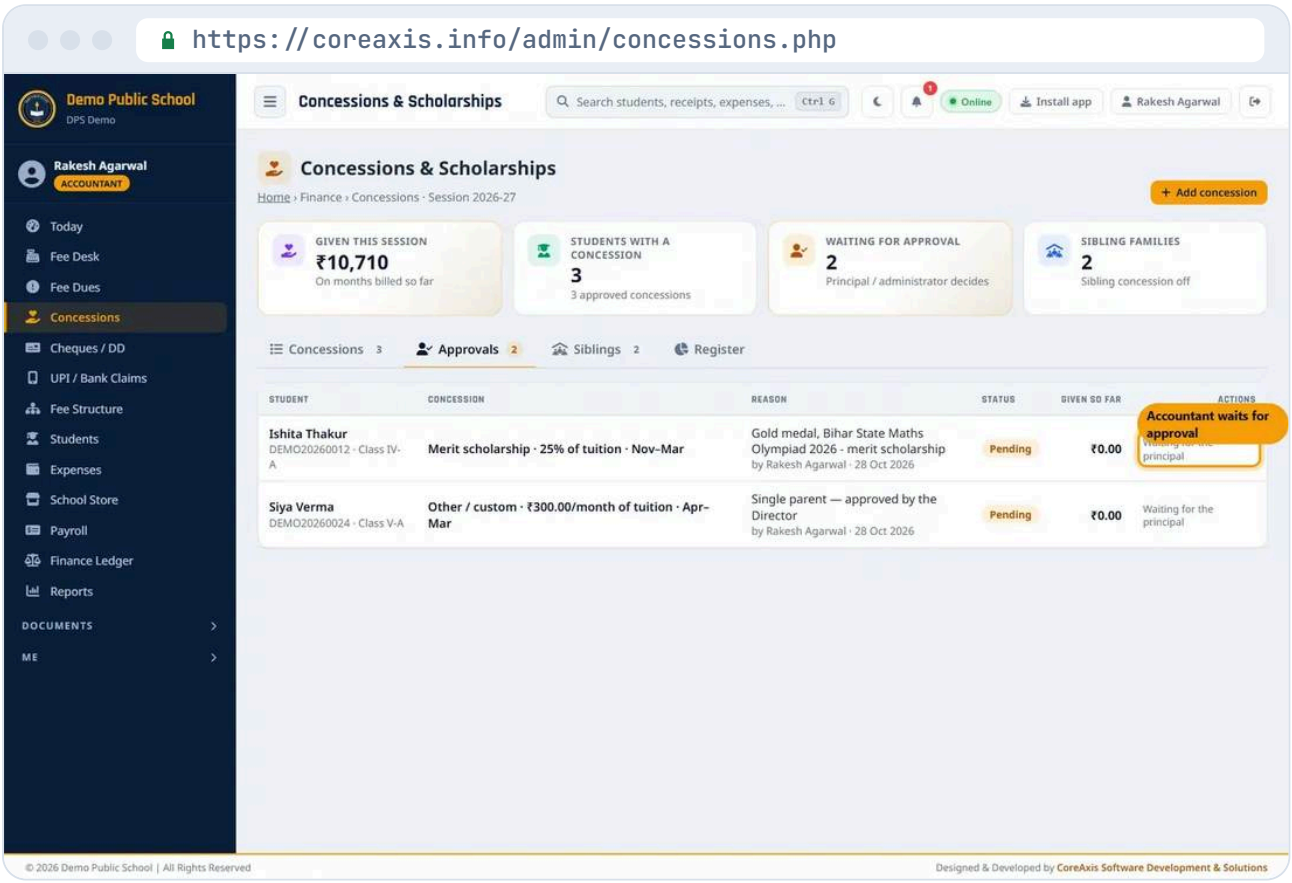
7 Write the **Reason**, for example `Gold medal, Bihar State Maths Olympiad 2026 - merit scholarship`.



The filled form. The note says it applies after the principal approves it.

8 Click **Save**, then **Confirm**. The message says the concession was sent for approval by the principal.

9 Open the **Approvals** tab. The row shows **Pending** and "Waiting for the principal".



Accountants cannot approve; the row waits for the principal.

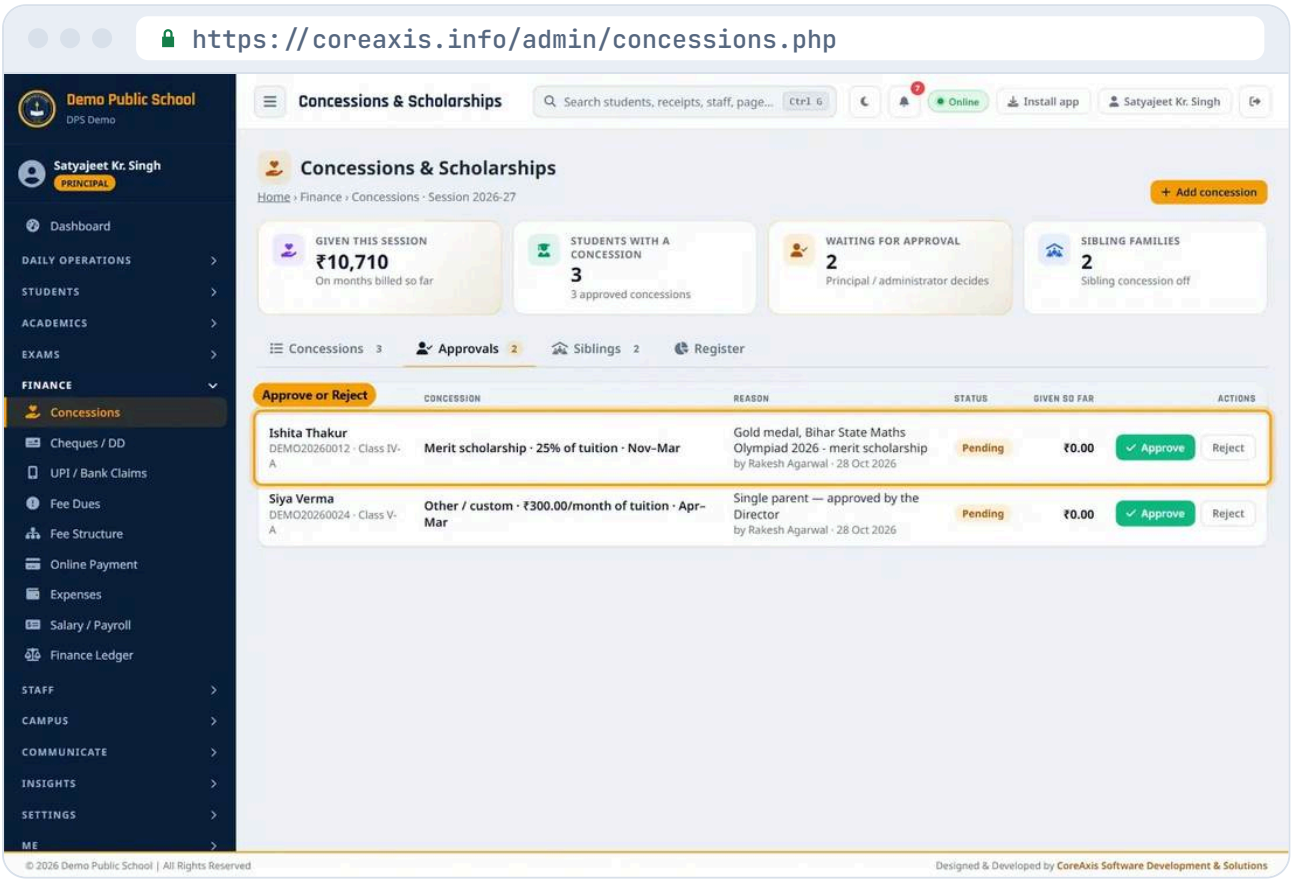
TIP Types: Staff ward, RTE (25% quota), Merit scholarship, Need-based, Other / custom.

TIP Applies to: Tuition, One fee head (choose the head, for example Exam Fee), or Tuition + all charges.

TIP As: Percent (%) or Fixed ₹ per month / line.

Approve a concession (Principal: Ishita Thakur)

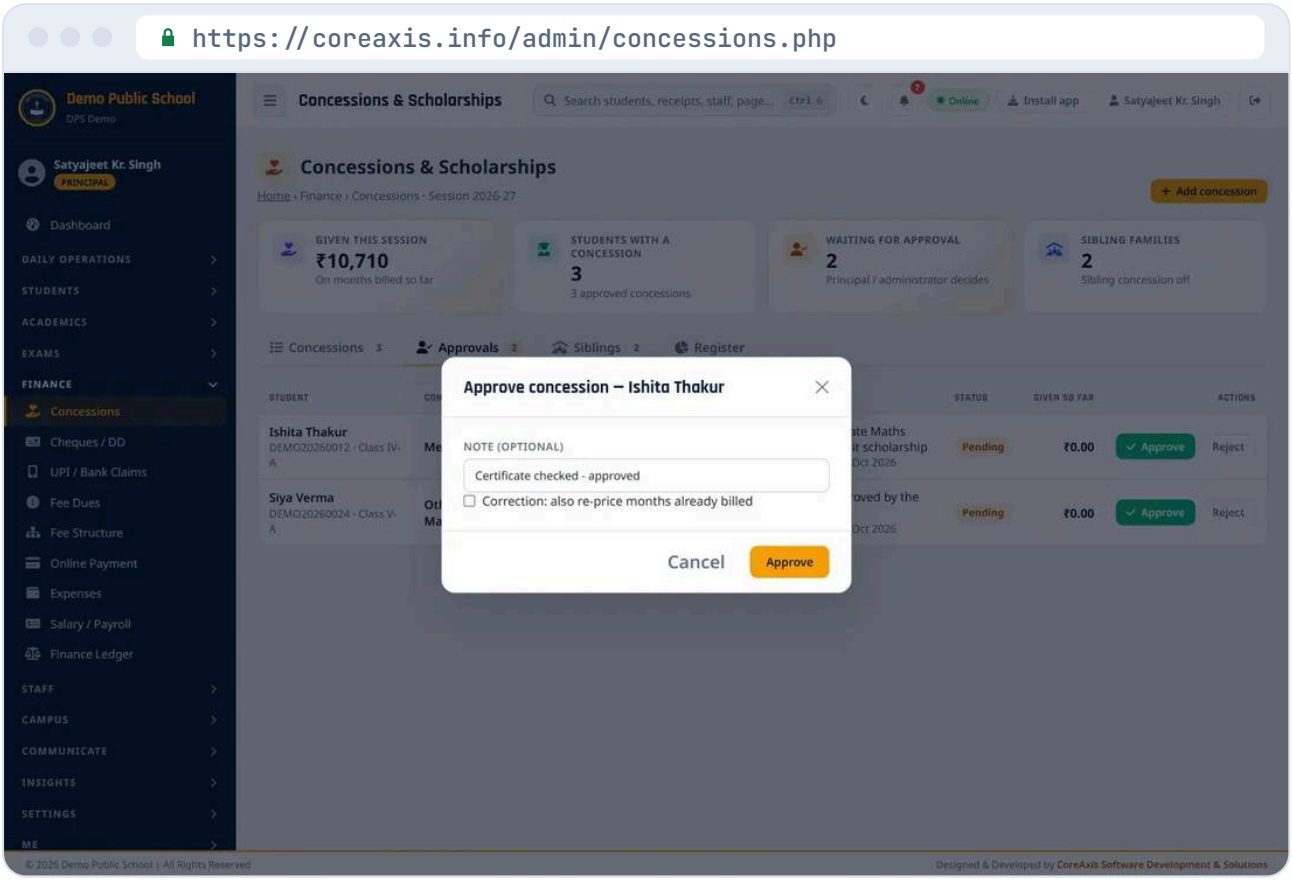
1 Sign in as Principal or Admin and open **Concessions › Approvals**. Both pending concessions are listed.



Pending concessions with Approve and Reject.

2 Click **Approve** on Ishita Thakur's row.

3 Type a **Note (optional)**, for example `Certificate checked - approved`.



Approve window with an optional note.

4 Leave **Correction: also re-price months already billed** unticked. The concession starts from November, so no billed month needs changing.

5 Click **Approve**, then **Approve** again in the popup. Months billed from now get the 25% concession.

TIP Click **Reject** to turn a request down. The reason you type is saved with it.

TIP **Revoke** on an approved concession stops it for months billed from now.

Add a fixed concession and approve it at once (Principal: Pihu Jha, Class III-A, ₹200 per month)

1 As Principal, click **Add concession** and then **Yes, add**.

2 Pick **Pihu Jha · DEMO20260084** (Class III). Another Pihu Jha studies in Class IV; check the class.

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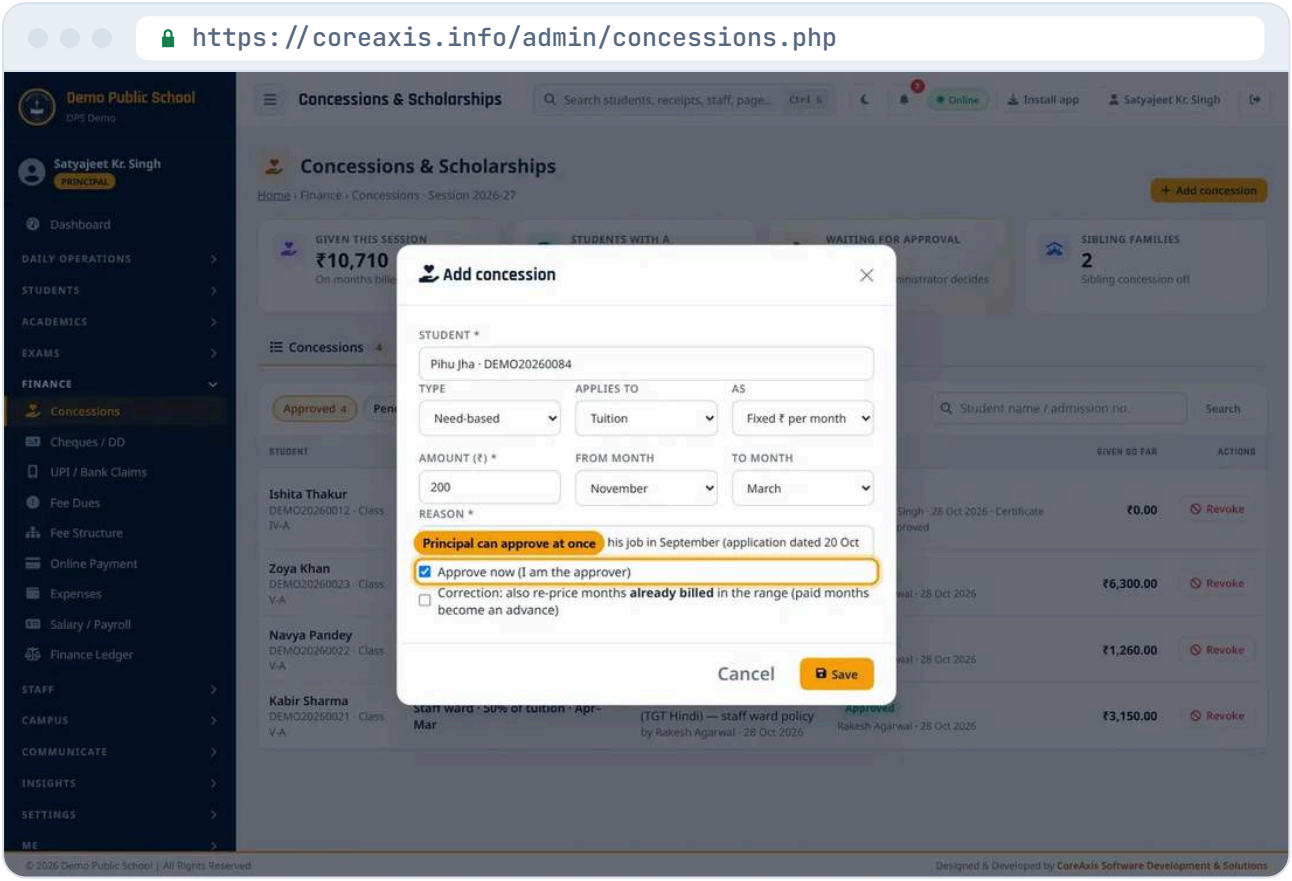
3. Set **Type** to **Need-based** and **As** to **Fixed ₹ per month / line**. Type `200` in **Amount (₹)**.

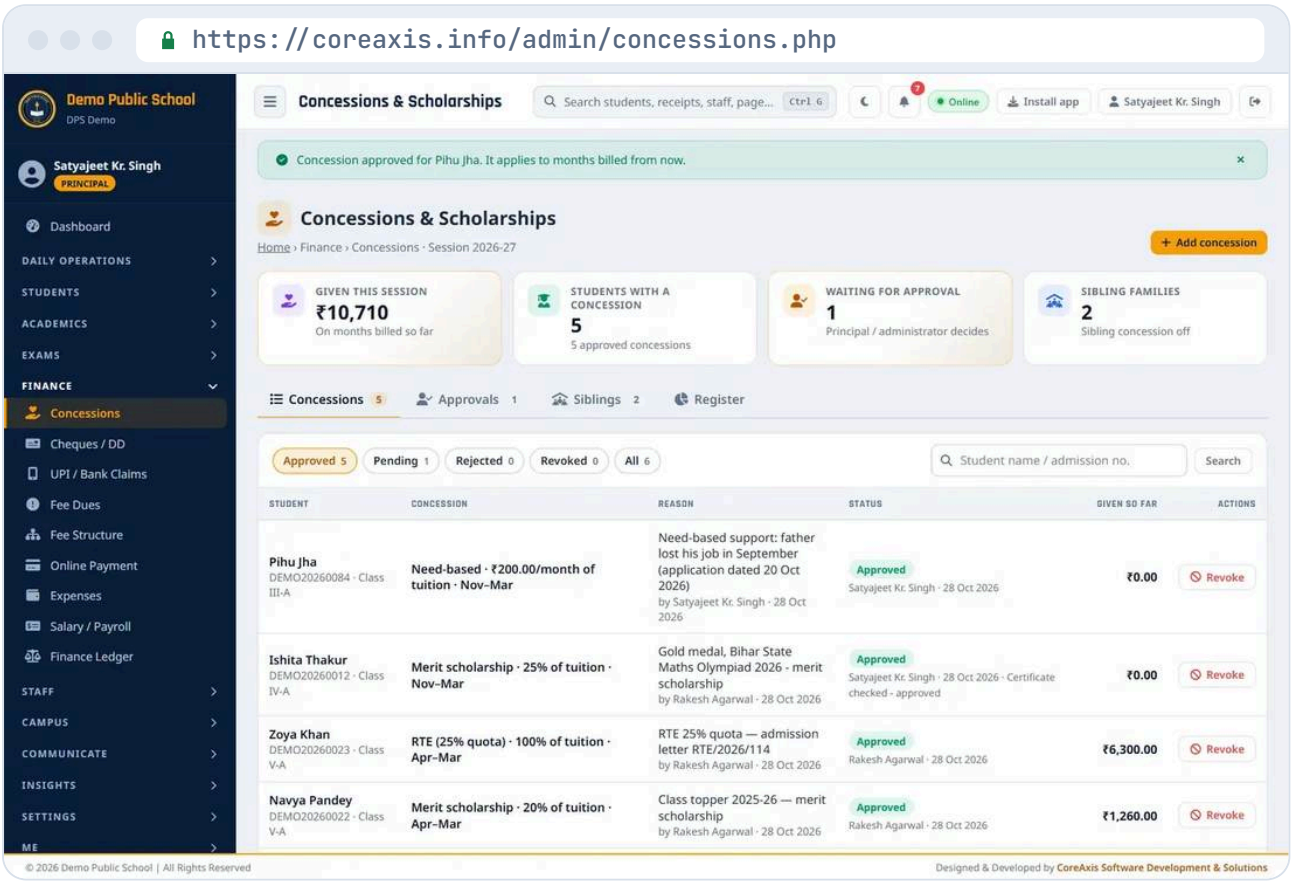
4. Set **From month** November and **To month** March, and write the reason, for example `Need-based support: father lost his job in September (application dated 20 Oct 2026)`.

5. Keep **Approve now (I am the approver)** ticked.



Only Admin / Principal see Approve now and Correction.

6 Click **Save**, then **Confirm**. The concession is approved at once and shows in the **Approved** list.

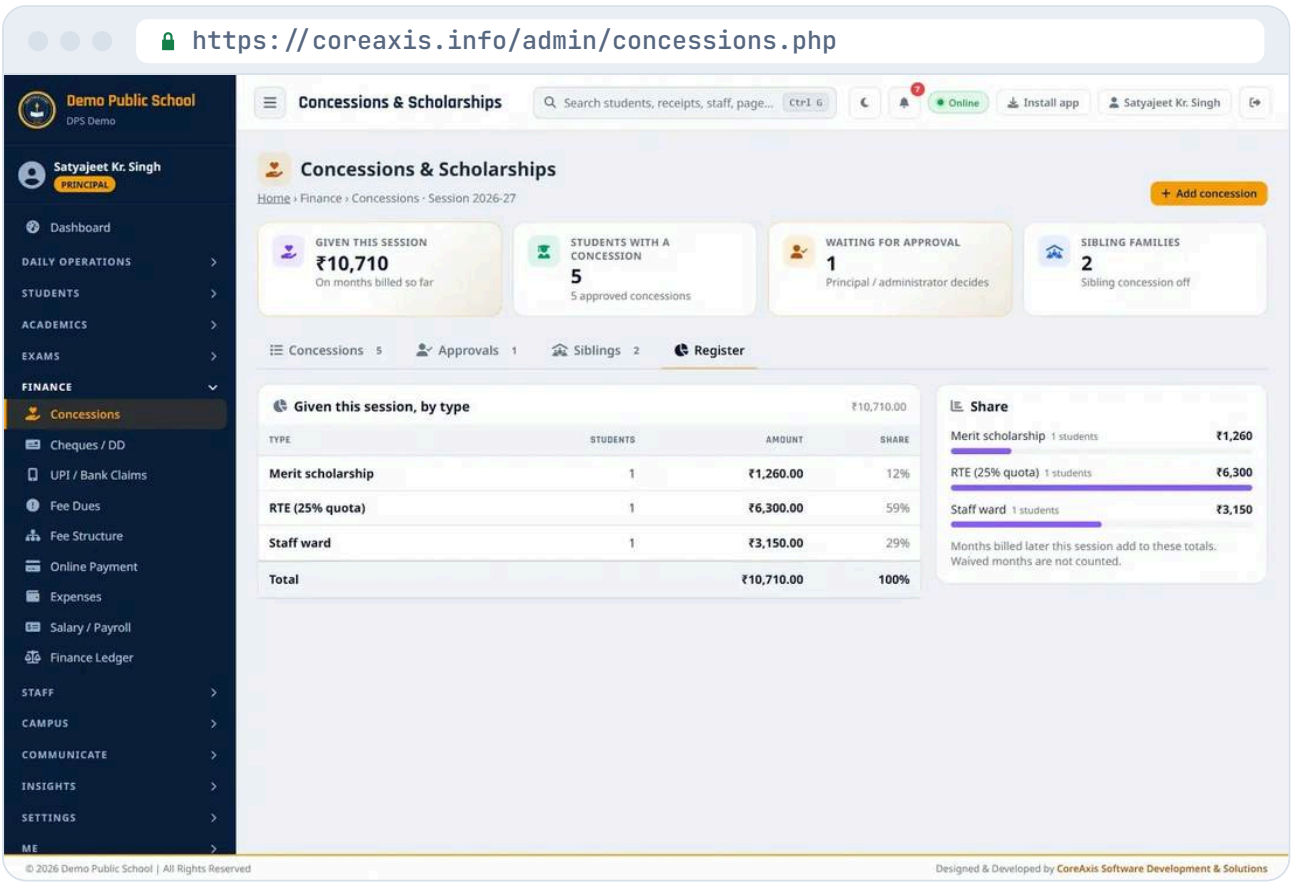


Approved concessions with who approved them and the Revoke button.

IMPORTANT Tick **Correction: also re-price months already billed** only when you really want to change months that are already billed. Months already paid then become an advance.

Concession register

1 Open the **Register** tab.



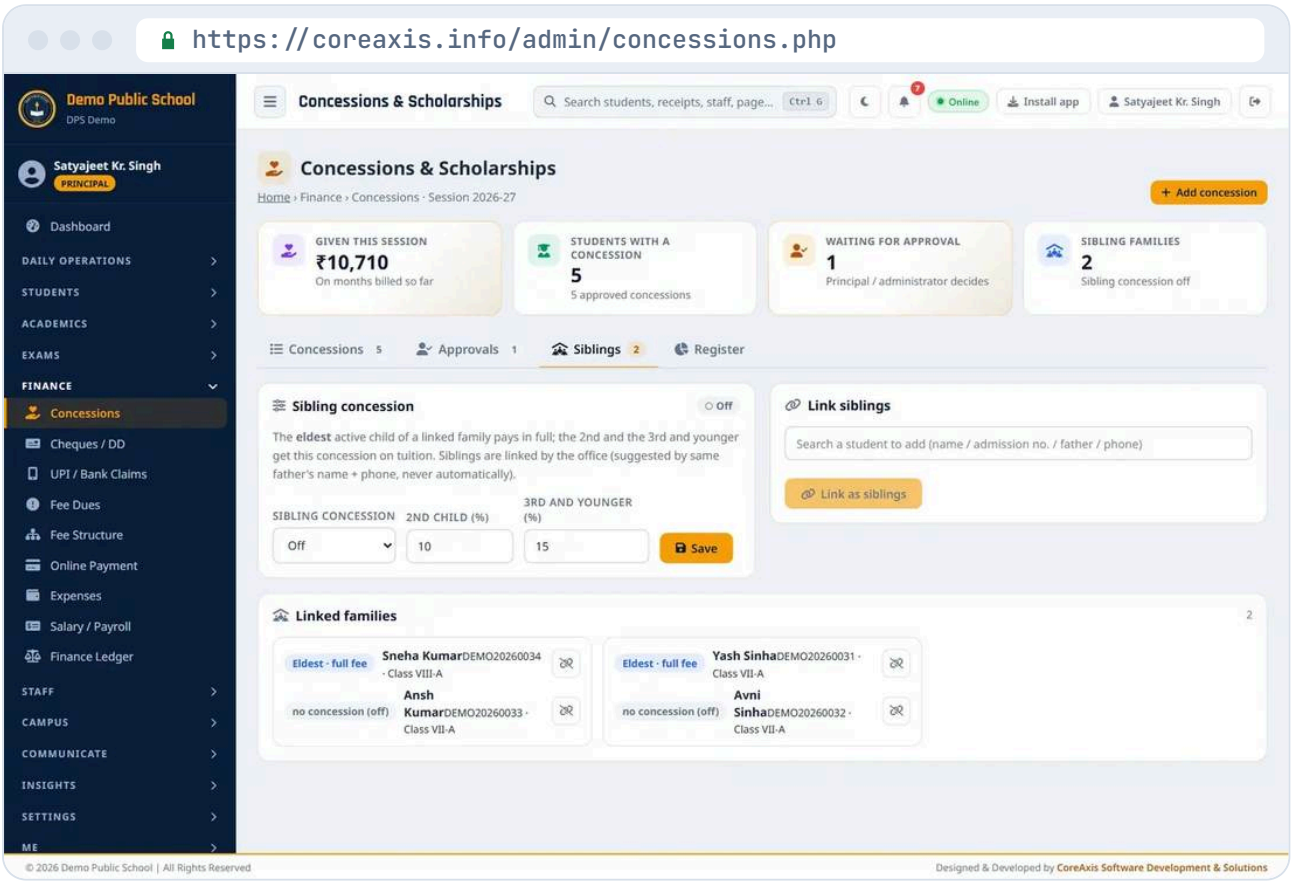
Amount given by type this session.

2 Read **Given this session, by type**: number of students, amount and share for each type. Months billed later this session add to these totals.

Link siblings (Principal: Kritika Mishra, Class III-A and Vanshika Mishra, Class V-A)

Linking tells the app that students are brothers and sisters. When the sibling concession is on, the eldest pays full fee and the younger ones get the set percent off tuition. Only Admin / Principal can link and unlink.

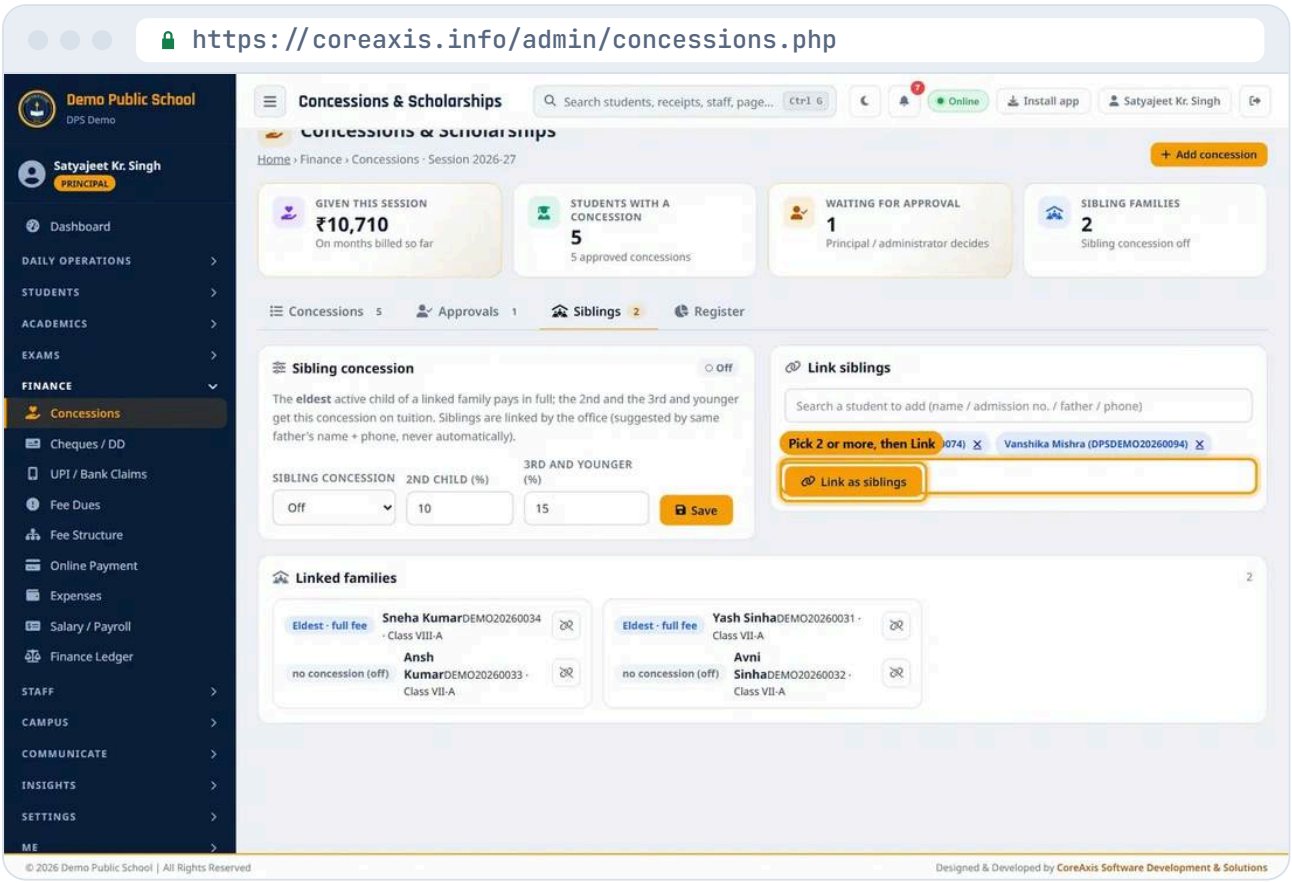
1 Open the **Siblings** tab. The left card shows the **Sibling concession** setting (Off in the demo school; 2nd child 10%, 3rd and younger 15%).



Sibling concession setting, Link siblings and Linked families.

2 In **Link siblings**, type `Kritika Mishra` and pick **DPSDEMO20260074** (Class III).

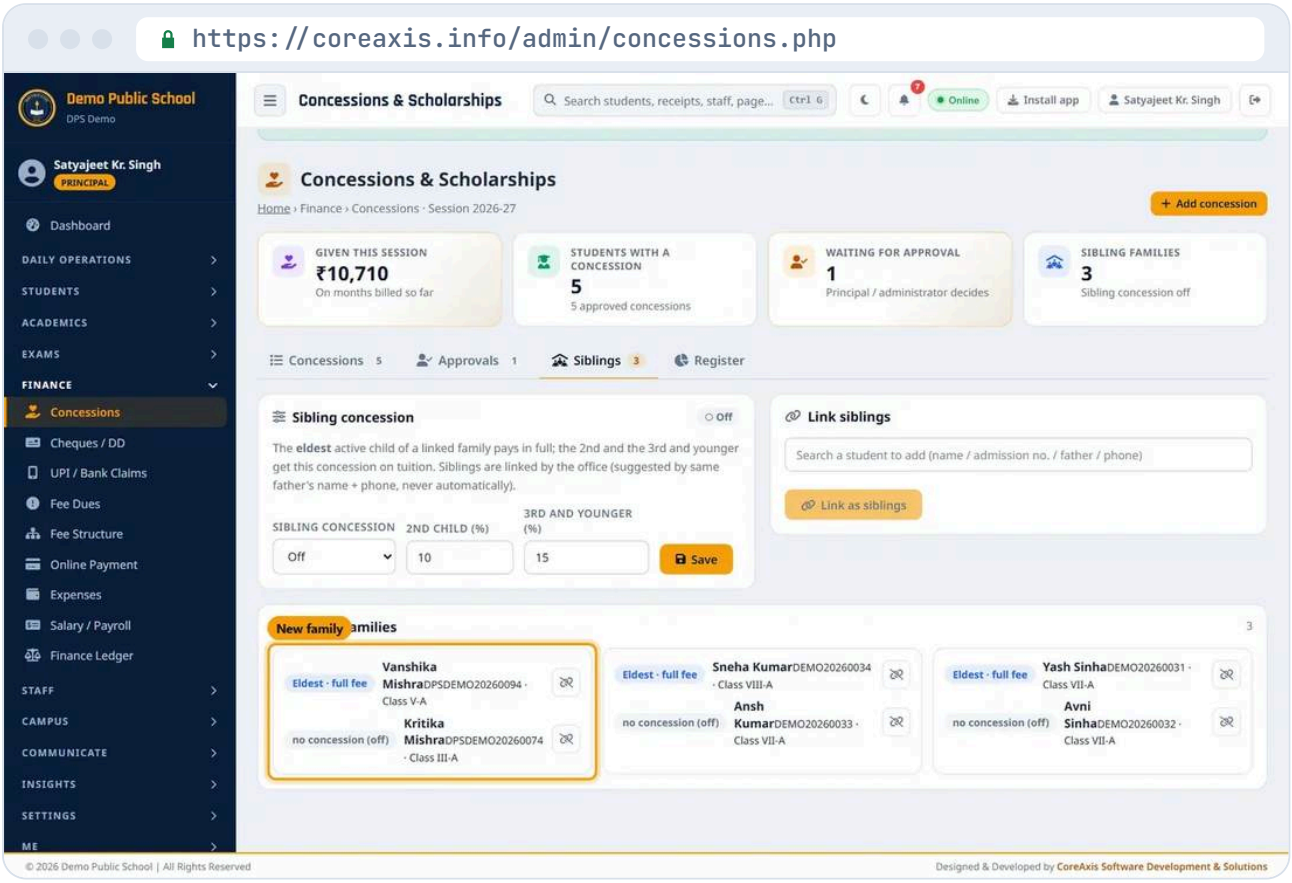
3 Type `Vanshika Mishra` and pick **DPSDEMO20260094** (Class V). Both names show as chips.



Pick two or more students, then Link as siblings.

4 Click **Link as siblings**, then **Confirm**.

5 The new family appears under **Linked families**. Vanshika (the elder) is marked **Eldest · full fee**; Kritika shows the concession she gets ("no concession (off)" while the setting is off).



The new family card.

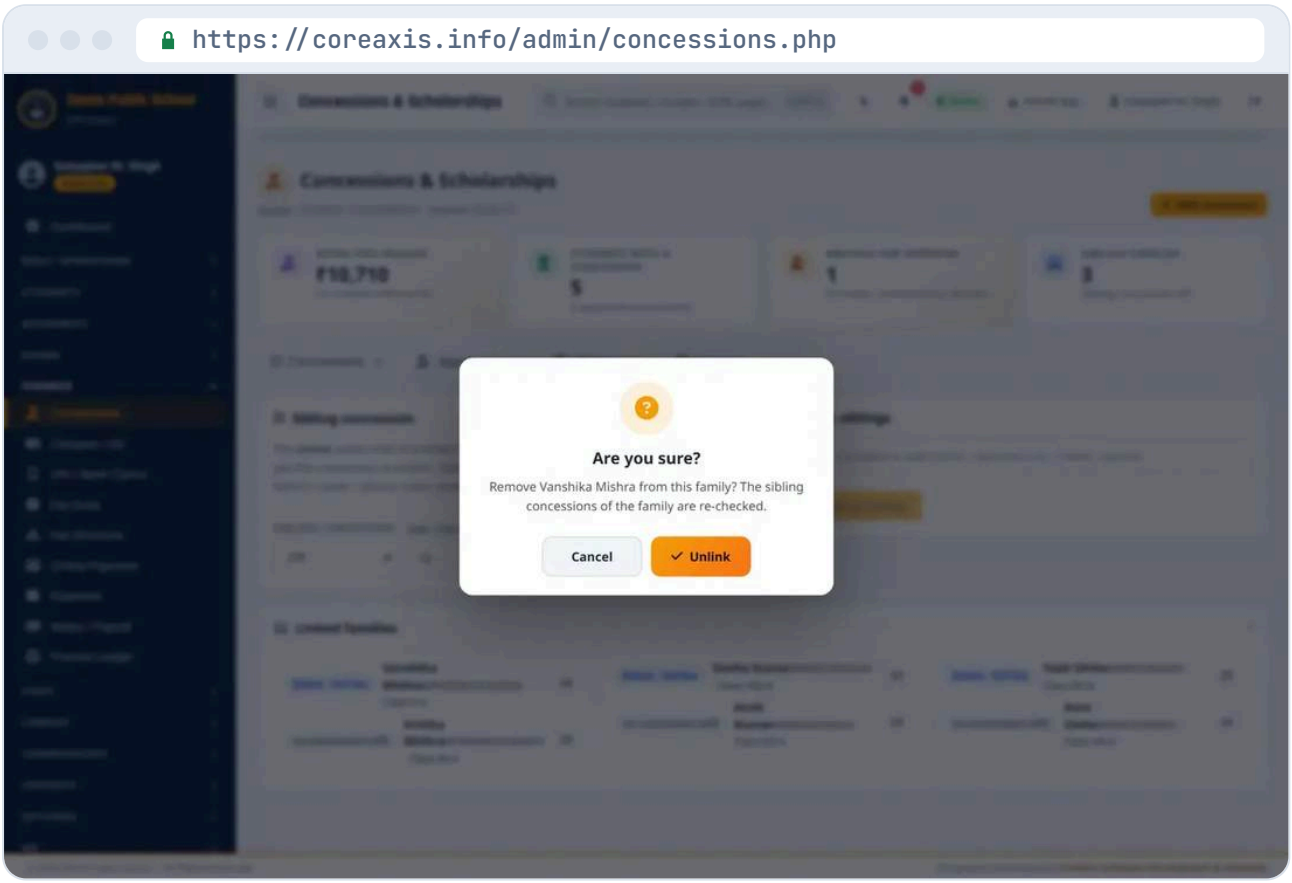
6 To switch the sibling concession on, set **Sibling concession** to **On**, enter the percents and click **Save**. It prices months billed from now.

TIP When the app finds students with the same father's name and phone, a **Possible siblings** list appears with a Link button. The app never links them on its own.

Unlink a sibling

1 In **Linked families**, click the unlink icon next to the student who is not part of the family (for example a cousin linked by mistake).

2 Read the popup: "Remove … from this family? The sibling concessions of the family are re-checked."



Unlink asks once before removing.

3 Click **Unlink** to remove, or **Cancel** to keep the family as it is.

Questions

Who can approve a concession?

Only the Principal or an Admin. Accountants can add a concession, which then waits in Approvals.

The concession is approved but the old months did not change.

A concession prices months billed after approval. To change months already billed, the Principal ticks Correction when approving or adding it.

Where does the parent see the concession?

The tuition billed in the portal is already reduced. The Fee Desk card shows a green Concession this session line.

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How do I give RTE students free tuition?

Add a concession with Type RTE (25% quota), Applies to Tuition, Percent 100, April to March.

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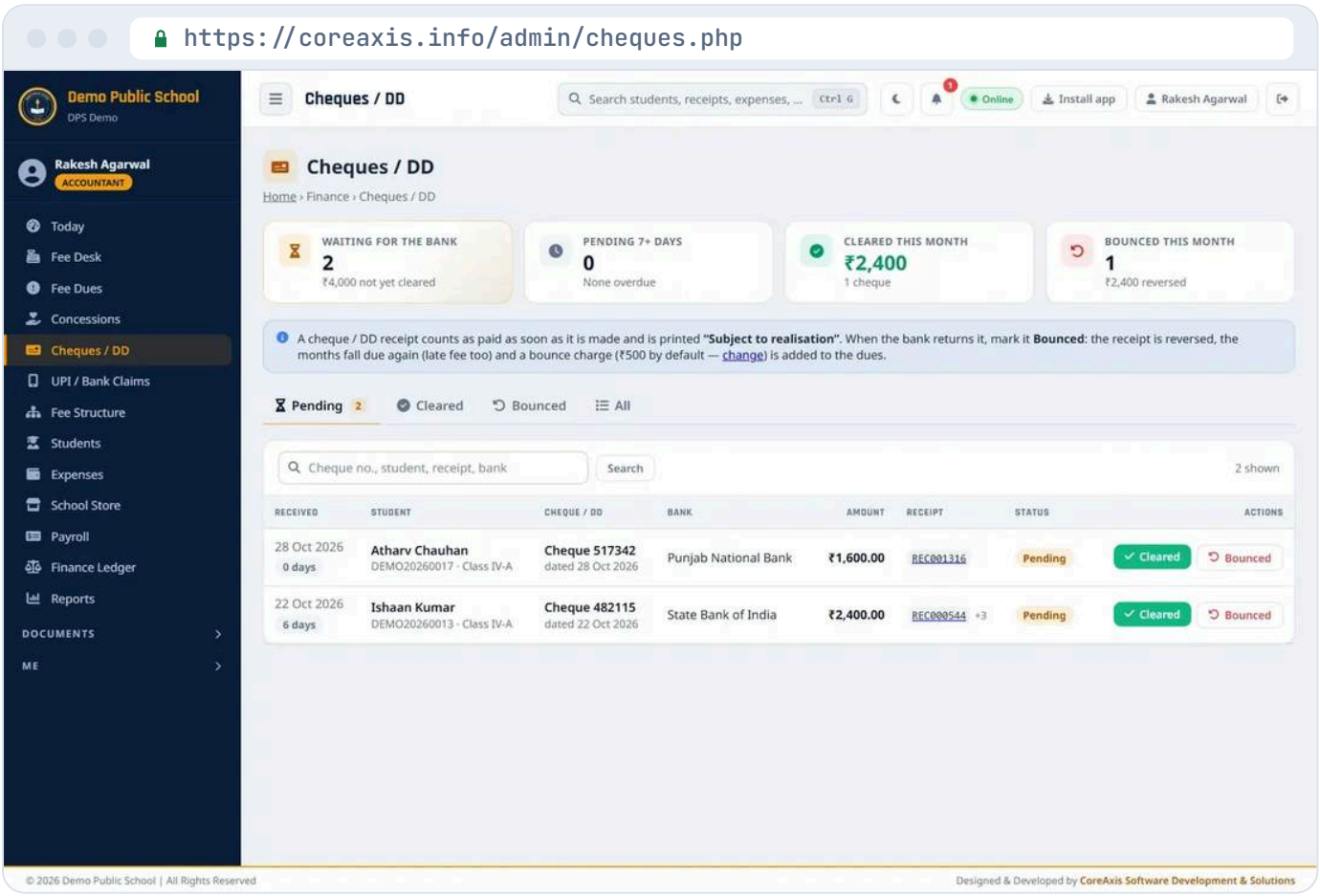
FINANCE · CHAPTER 27

Cheques / DD

Admin Principal Accountant MENU Finance › Cheques / DD (Accountant: Cheques / DD)

A cheque or DD receipt counts as paid as soon as it is made at the Fee Desk and is printed "Subject to realisation". This page lists those receipts so the office can match them with the bank statement. Mark each one Cleared when the money arrives, or Bounced when the bank returns it.



Cheques / DD — Demo Public School

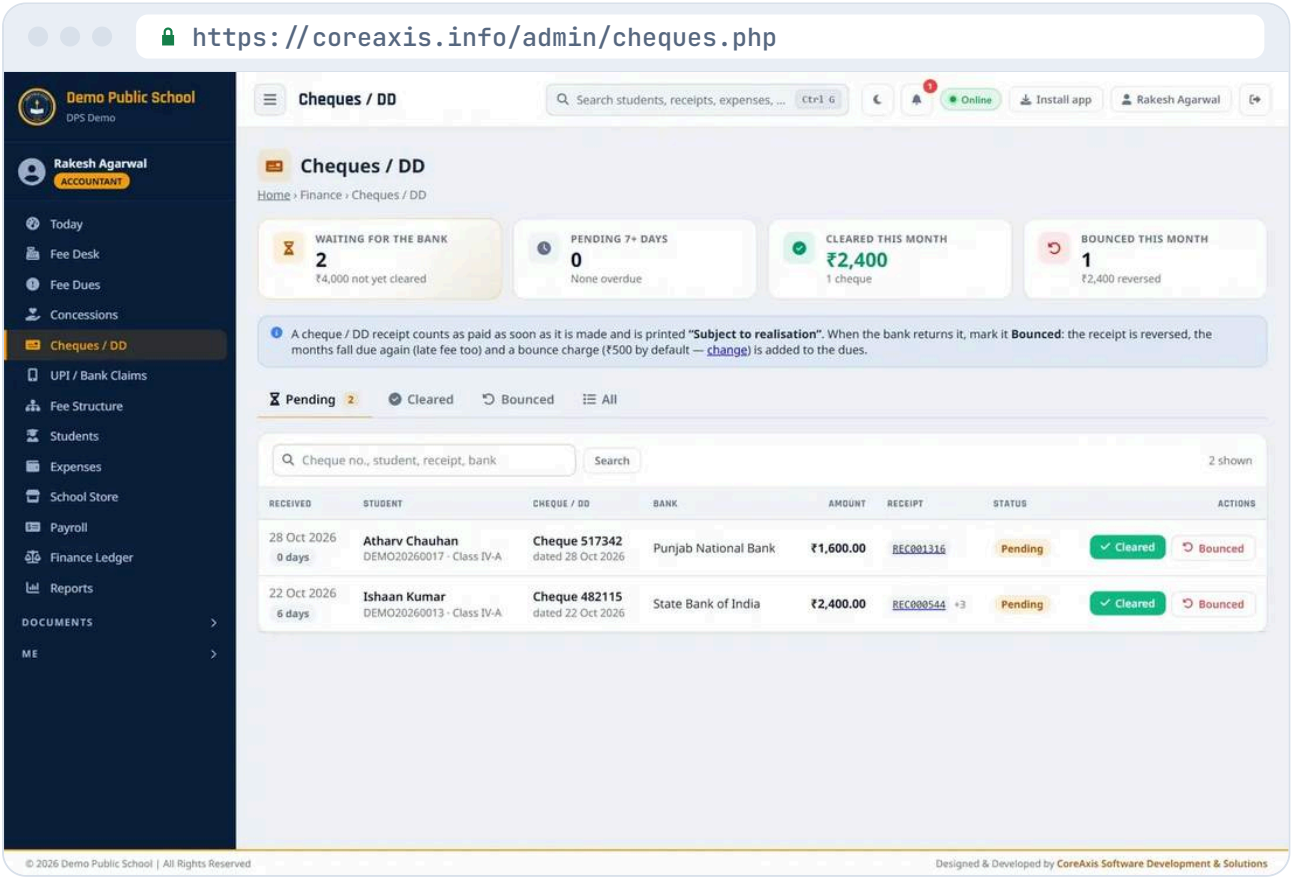
Screen at a glance

Waiting for the bank	Cheques / DDs not yet cleared and their total.
Pending 7+ days	Cheques waiting more than a week. Check them with the bank.
Cleared this month	Amount and number of cheques cleared this month.

Bounced this month	Number of bounced cheques and the amount reversed.
Tabs	Pending, Cleared, Bounced, All.
Search	Find by cheque no., student, receipt or bank.
Columns	Received (date and days waiting), Student, Cheque / DD (number and date), Bank, Amount, Receipt (+n means one cheque paid several receipts), Status, Actions.
Cleared	Marks the cheque as paid by the bank.
Bounced	Opens the bounce form. It is also shown on cleared cheques, in case the bank returns a cheque later.

Mark a cheque cleared (example: Ishaan Kumar, Class IV-A, cheque 482115, ₹2,400)

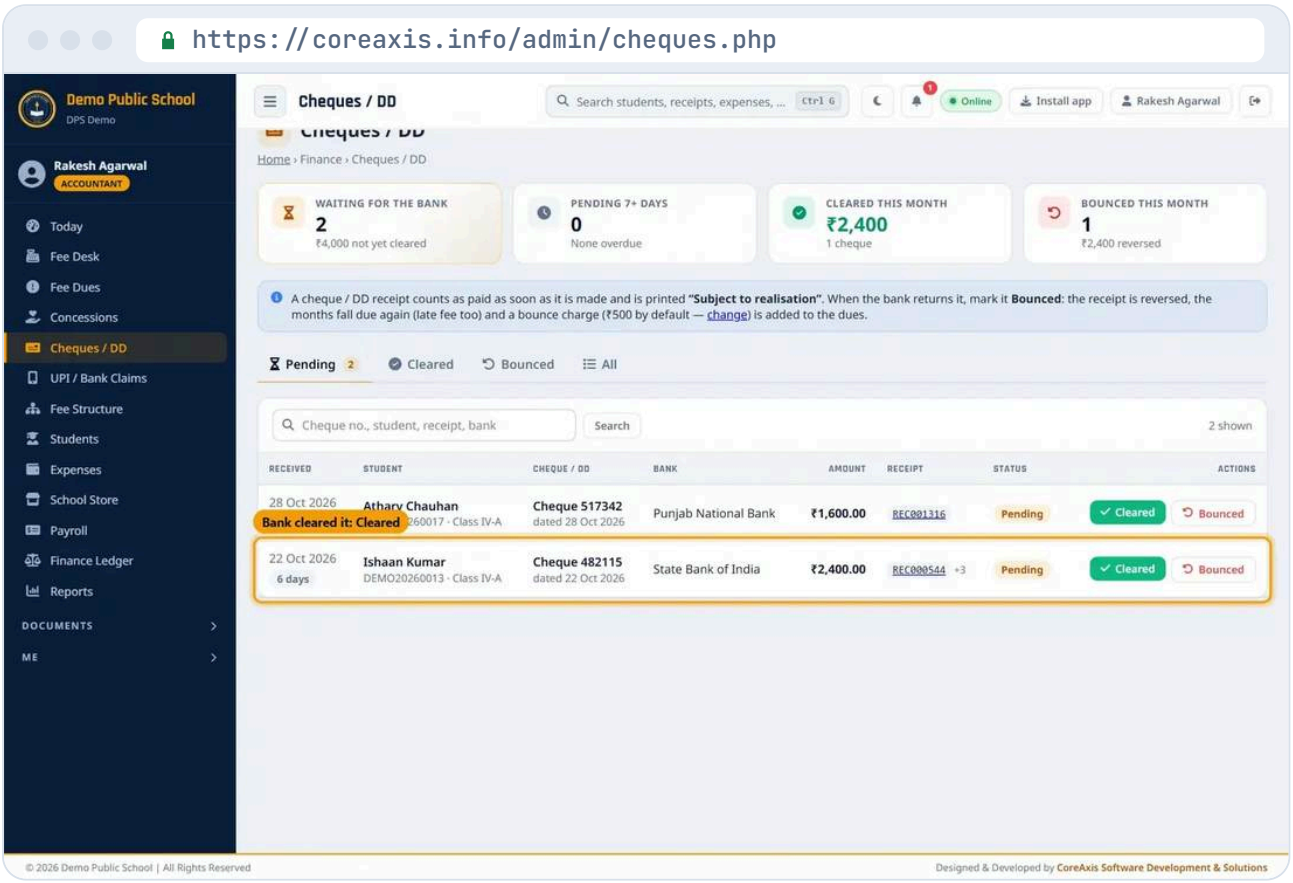
1. Open **Cheques / DD**. The **Pending** tab lists cheques waiting for the bank, oldest at the bottom.



Two cheques waiting: Atharv Chauhan (0 days) and Ishaan Kumar (6 days).

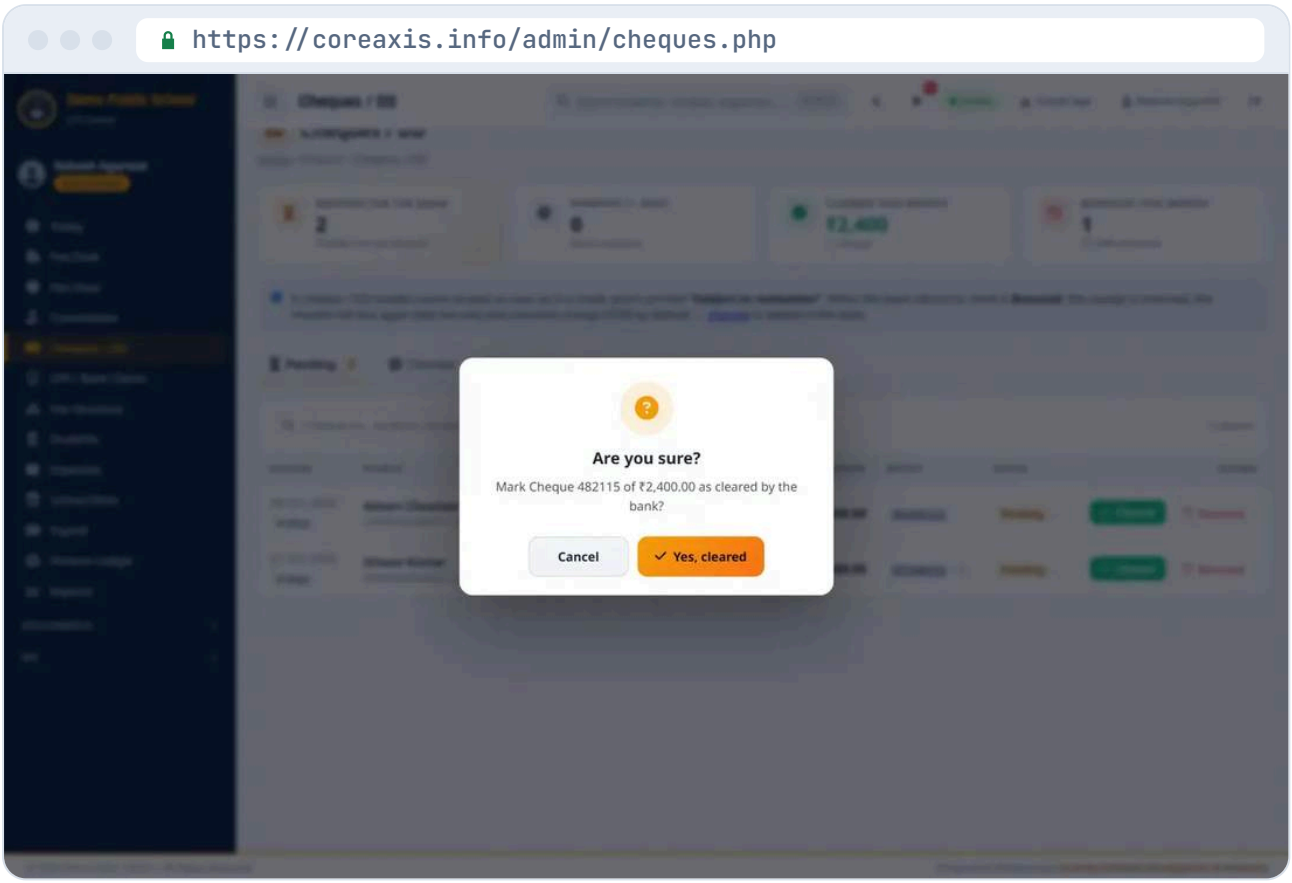
2 Find cheque **482115** of Ishaan Kumar in your bank statement (₹2,400, State Bank of India).

3 Click **Cleared** on that row.



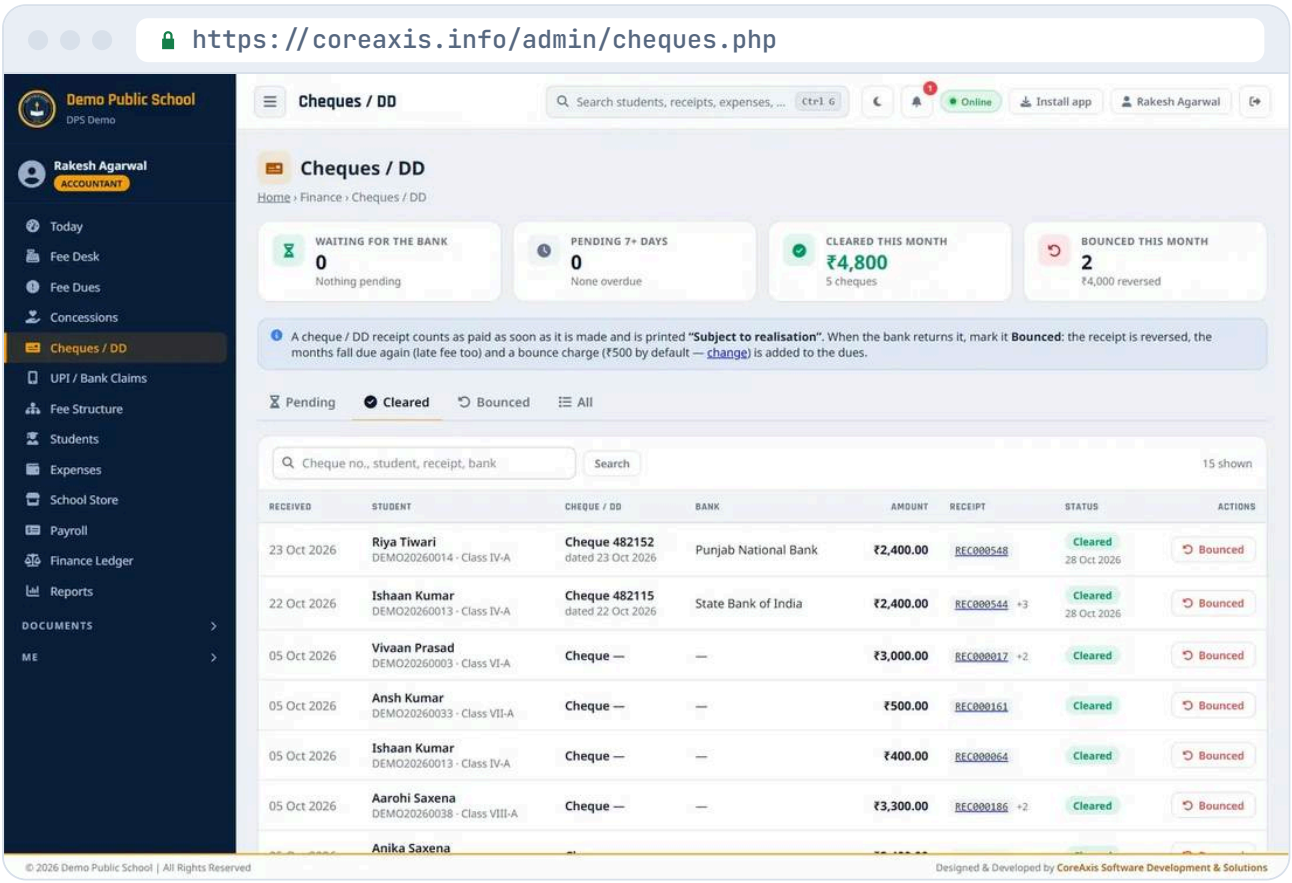
Cleared button on the row.

4 Check the popup "Mark Cheque 482115 of ₹2,400.00 as cleared by the bank?" and click **Yes, cleared**.



Confirm the clearance.

5 The message says the cheque was marked cleared (4 receipts). It moves to the **Cleared** tab.



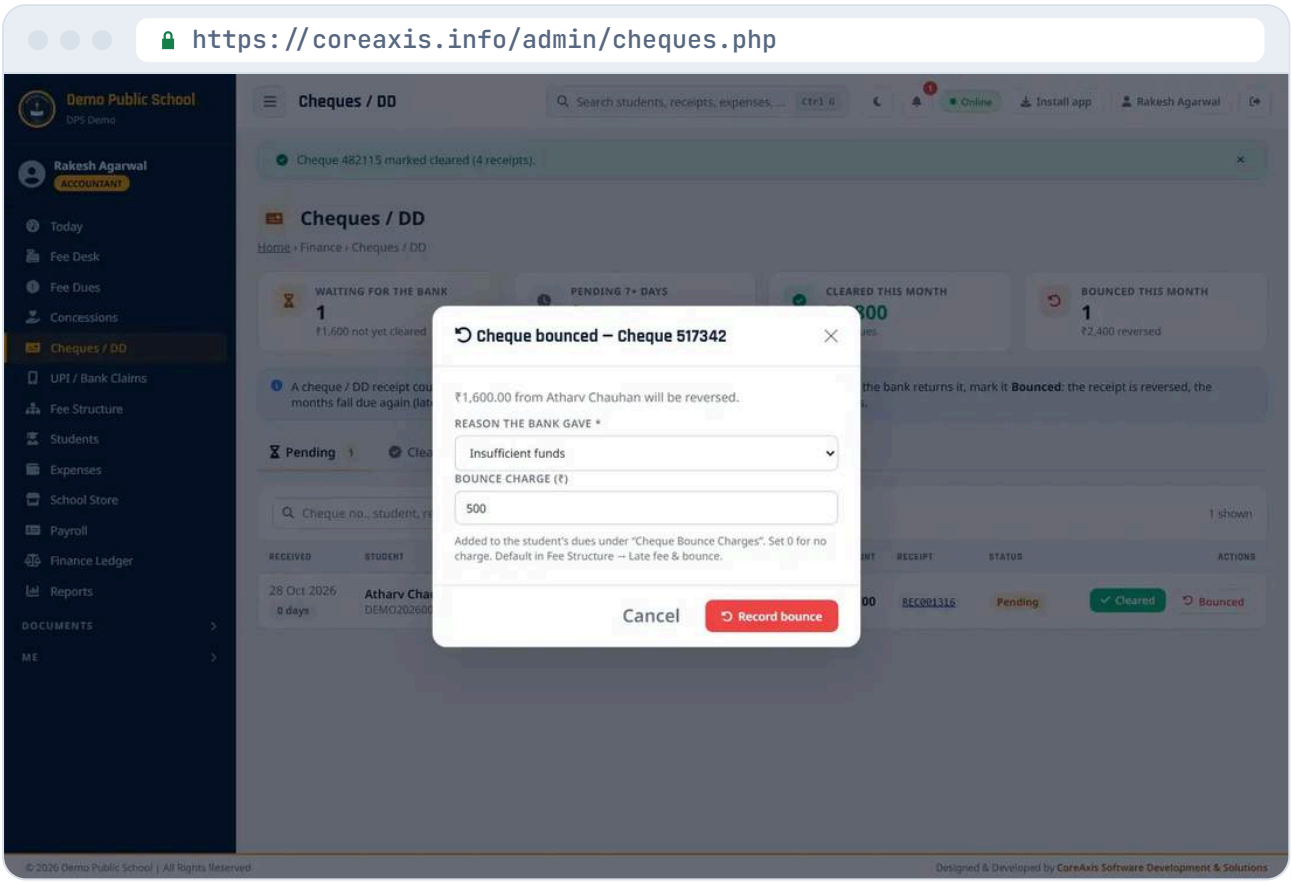
Cleared tab with the date of clearing.

Record a bounced cheque (example: Atharv Chauhan, Class IV-A, cheque 517342, ₹1,600)

1 When the bank returns the cheque, open **Cheques / DD › Pending** and click **Bounced** on Atharv Chauhan's row.

2 Choose **Reason the bank gave**: **Insufficient funds**. Other choices are Signature mismatch, Payment stopped by drawer, Account closed, Cheque stale / post-dated, Amount in words and figures differ, Other.

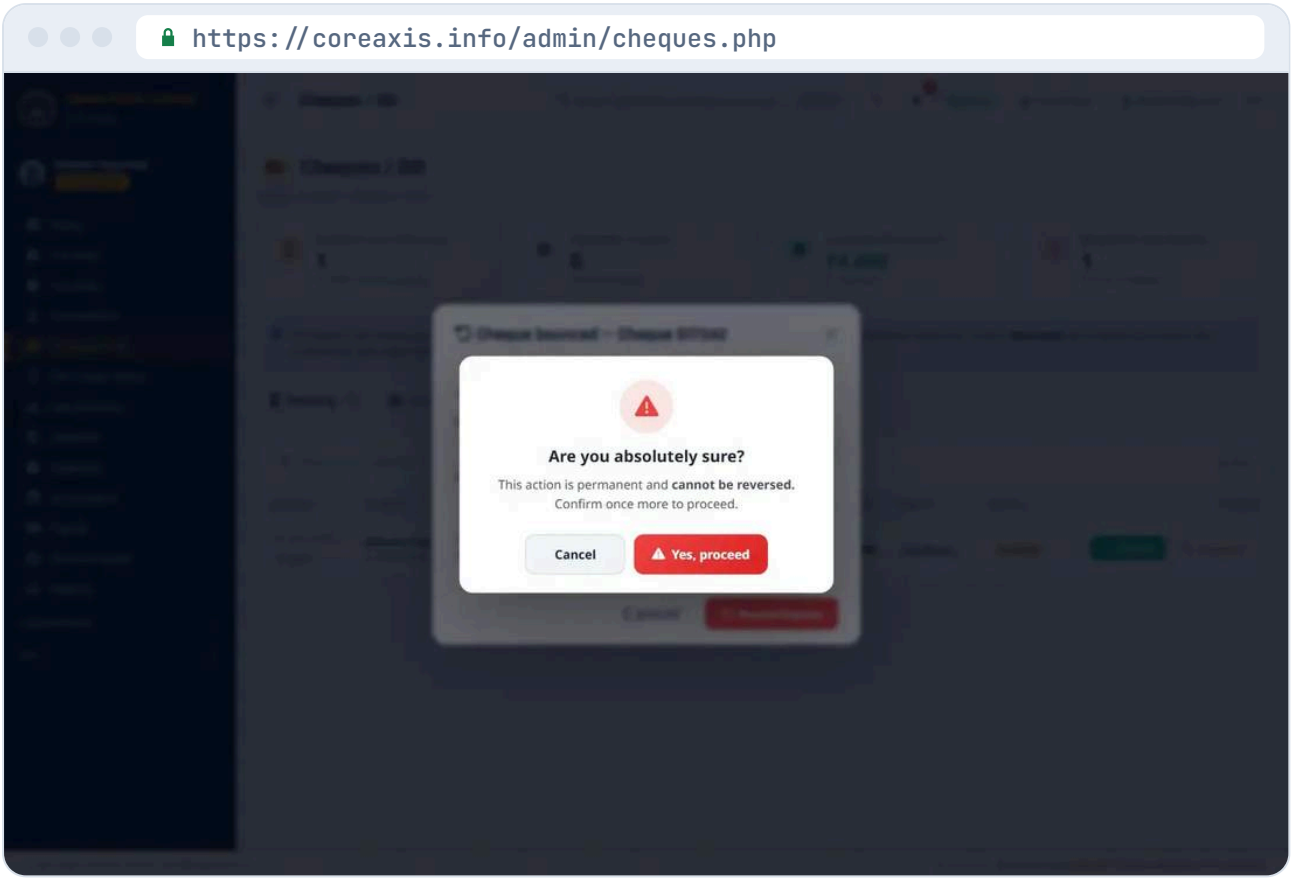
3 Check **Bounce charge (₹)**. It is filled with the school's default (₹500). Change it for this cheque if needed, or type 0 for no charge.



The bounce form shows the amount that will be reversed.

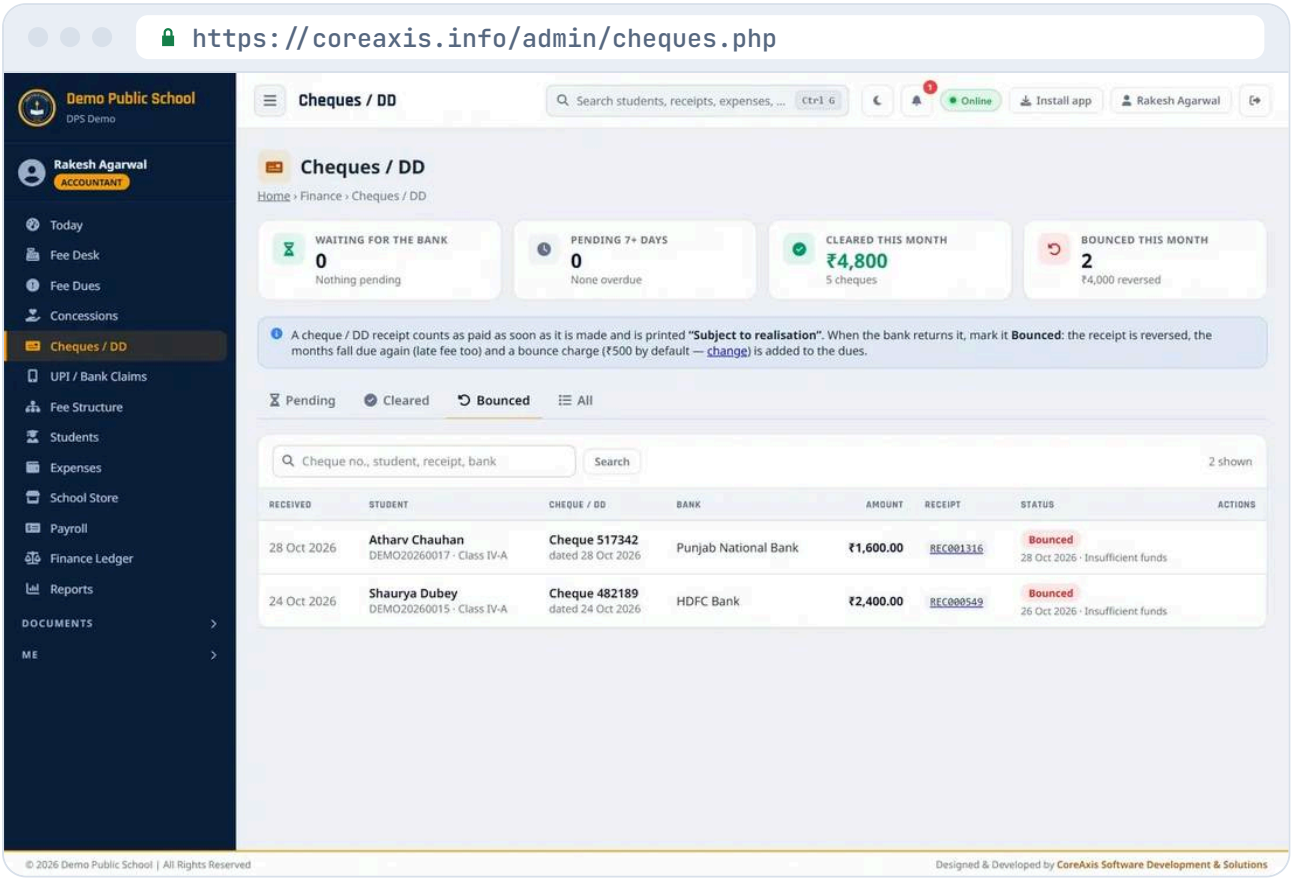
4 Click **Record bounce**, then **Yes, bounced**.

5 A second popup asks "Are you absolutely sure?". Click **Yes, proceed**.



Bouncing asks twice because it cannot be reversed.

6 Open the **Bounced** tab. The cheque shows the date and reason.



Bounced cheques with reason.

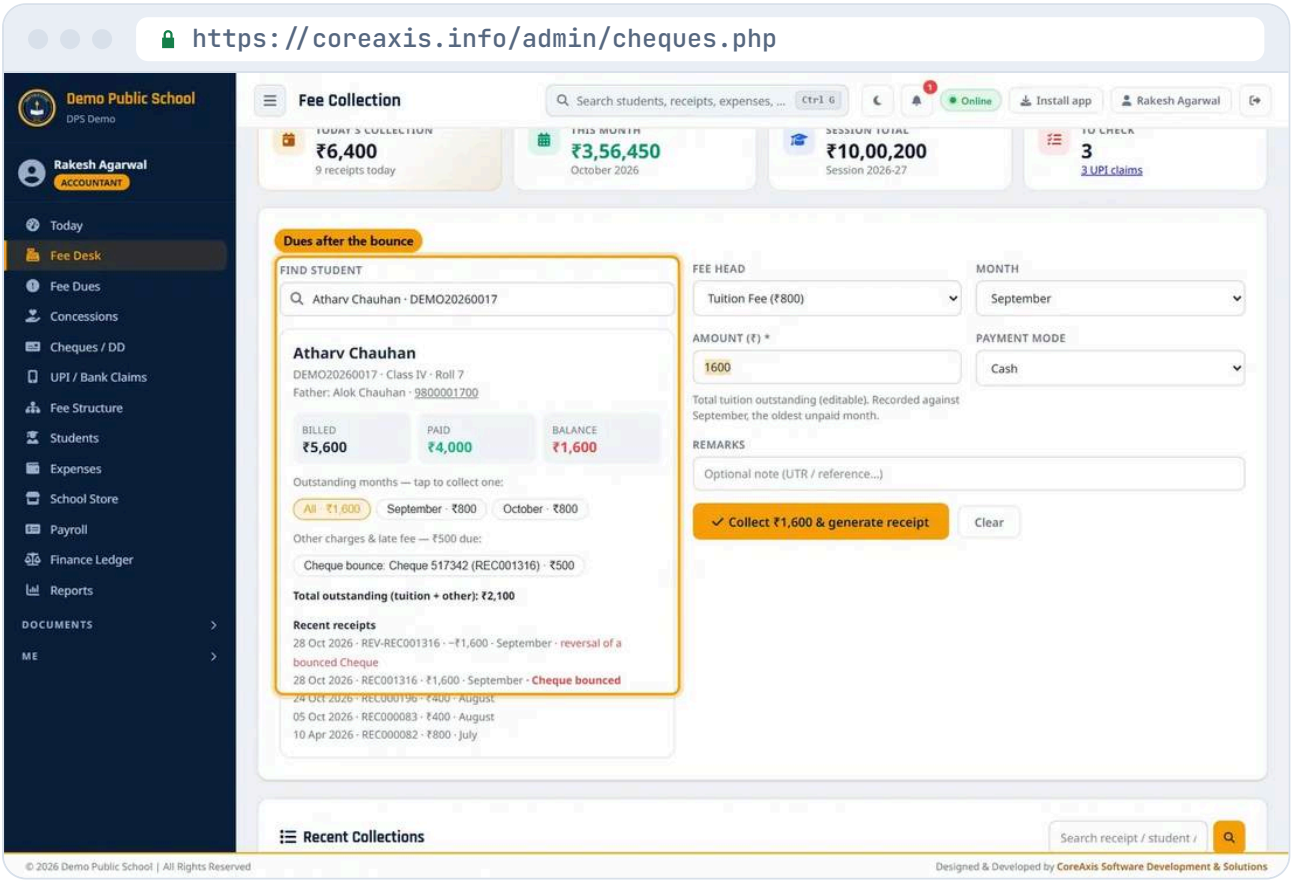
IMPORTANT Recording a bounce cannot be reversed. Make sure the bank has really returned the cheque.

What a bounce does to the student's dues

1 The receipt (REC001316) is reversed with a minus receipt (REV-REC001316). The receipt is printed as CANCELLED.

2 The months it paid (September and October) fall due again, with late fee if the late fee is on.

3 The bounce charge (₹500) is added under **Cheque Bounce Charges**. On the Fee Desk, Atharv's card now shows balance ₹1,600 plus **Cheque bounce: Cheque 517342 · ₹500**, total ₹2,100.



Atharv Chauhan's dues after the bounce.

4 Collect the new payment (cash or another cheque) at the Fee Desk as usual.

Questions

Where do I change the default bounce charge?

Fee Structure › Late fee & bounce › Cheque / DD bounce charge (Admin / Principal).

Can I delete a cheque receipt instead of bouncing it?

No. Always use Bounced, so the reversal, the reason and the charge are recorded.

A cheque was cleared but the bank returned it a week later.

Open the Cleared tab and click Bounced on that cheque.

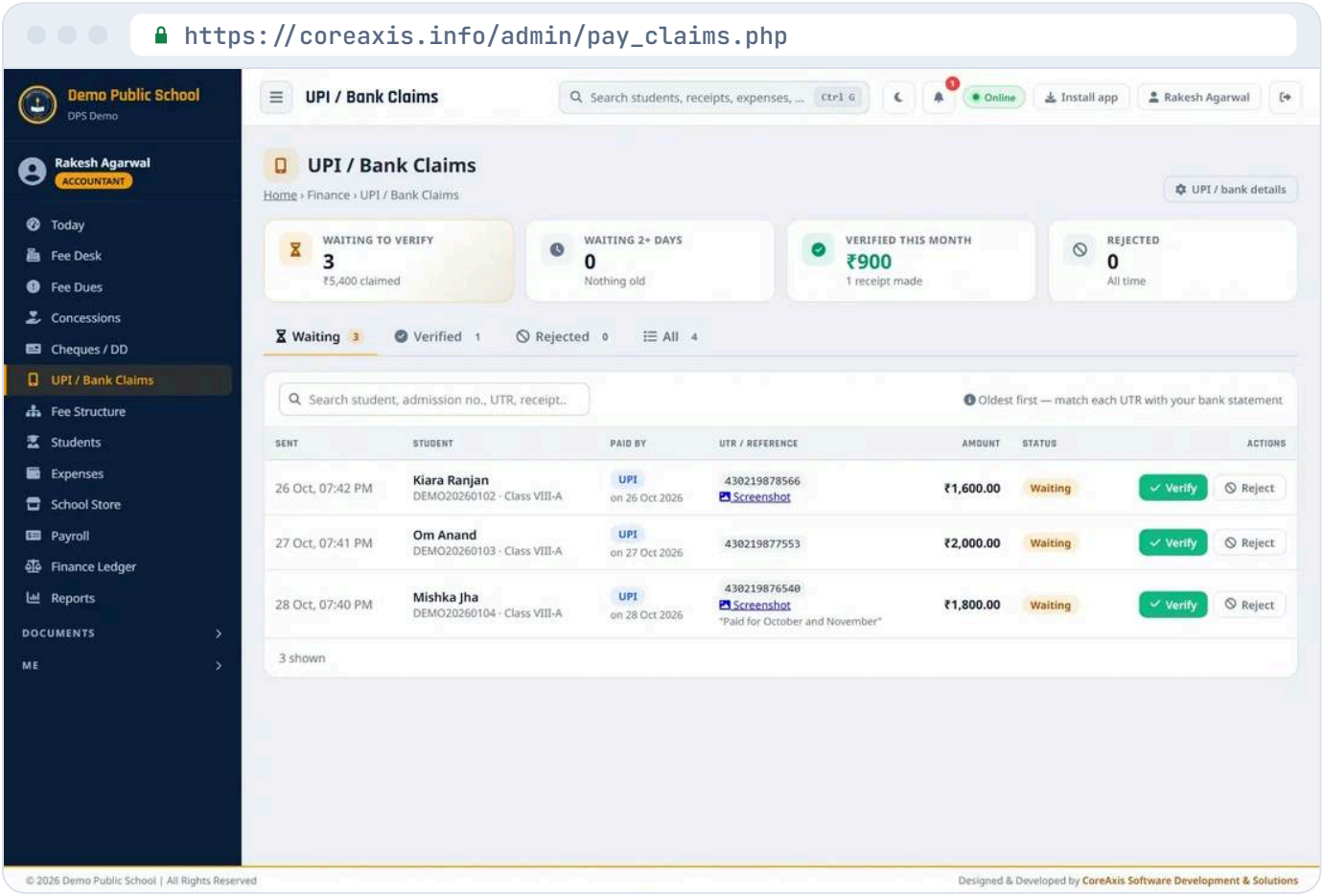
FINANCE · CHAPTER 28

UPI / Bank Claims

Admin | Principal | Accountant

MENU Finance › UPI / Bank Claims (Accountant: UPI / Bank Claims)

Parents can pay the fee from home by scanning the school's UPI QR (demopublicschool@sbi) or by NEFT / IMPS, with no gateway fee. In the parent portal or app they then send a claim: amount, UTR / reference number and an optional screenshot. The office matches each UTR with the bank statement and either verifies it (a receipt is made) or rejects it with a reason the parent can see.



UPI / Bank Claims — Demo Public School

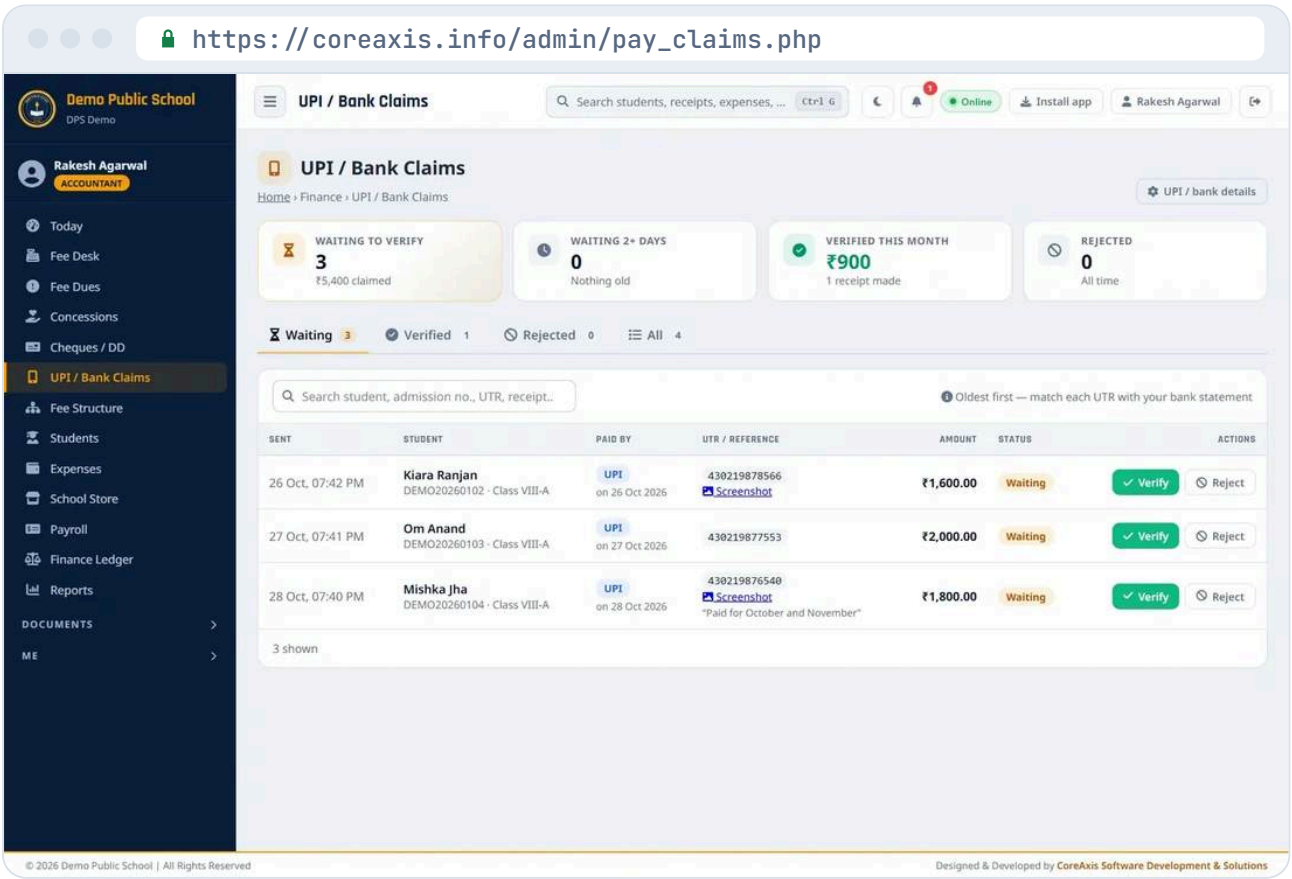
Screen at a glance

Waiting to verify	Claims not yet checked and the amount claimed.
Waiting 2+ days	Claims older than two days. Parents expect a receipt quickly.

Verified this month	Amount verified this month and number of receipts made.
Rejected	Claims rejected, all time.
Tabs	Waiting, Verified, Rejected, All.
Search	Find by student, admission no., UTR or receipt.
Columns	Sent (date and time), Student, Paid by (UPI or bank, payment date), UTR / reference (with Screenshot link and the parent's note), Amount, Status, Actions.
UPI / bank details (button)	Opens Online Payment, where the school's UPI ID and bank account are set (Admin / Principal).
Fee desk (button on verified rows)	Opens the student on the Fee Desk.

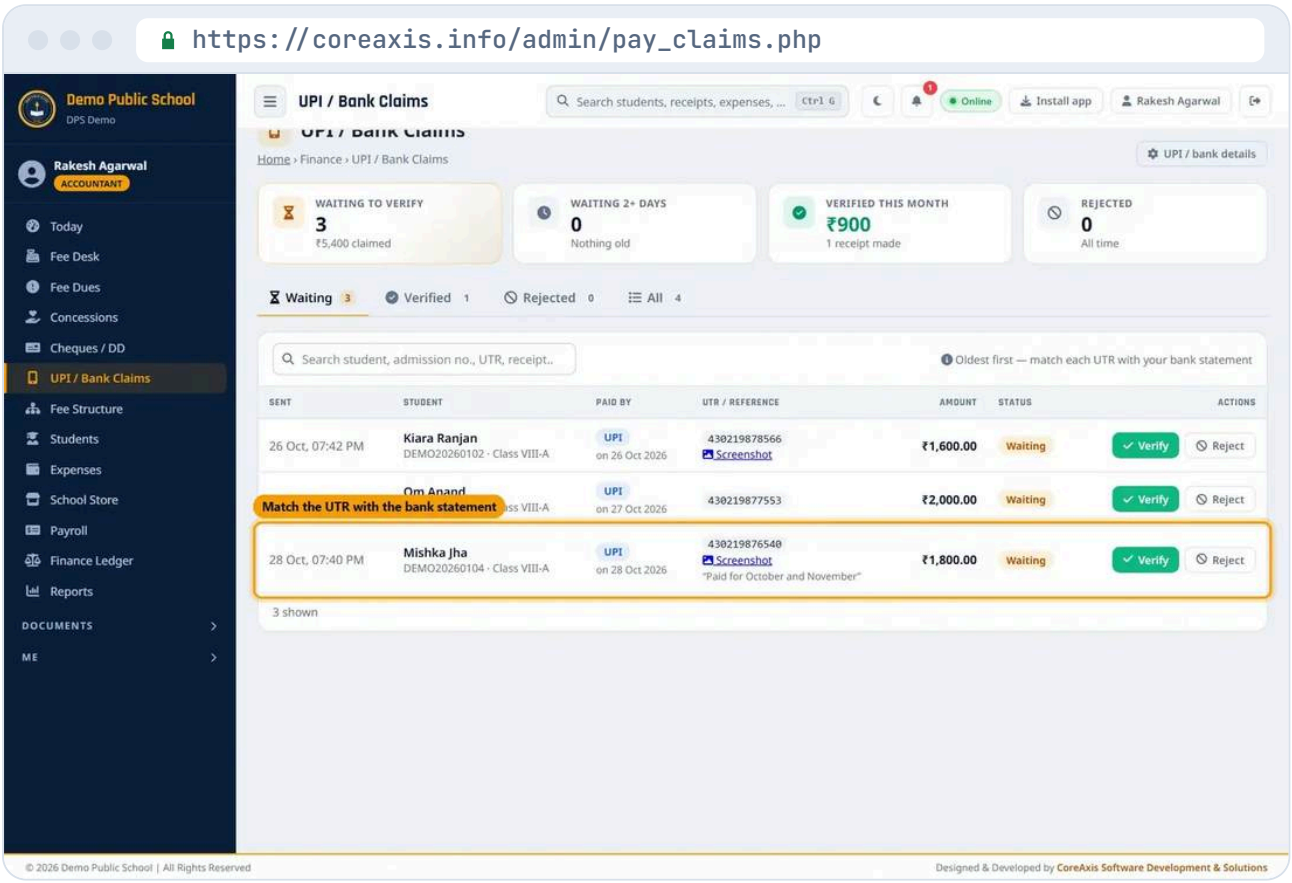
Verify a claim (example: Mishka Jha, Class VIII-A, ₹1,800 by UPI)

1. Open **UPI / Bank Claims**. The **Waiting** tab lists the claims, oldest first.



Three claims waiting to be checked.

2 Read Mishka Jha's claim: UTR **430219876540**, ₹1,800, note "Paid for October and November". Click **Screenshot** to see the parent's proof.

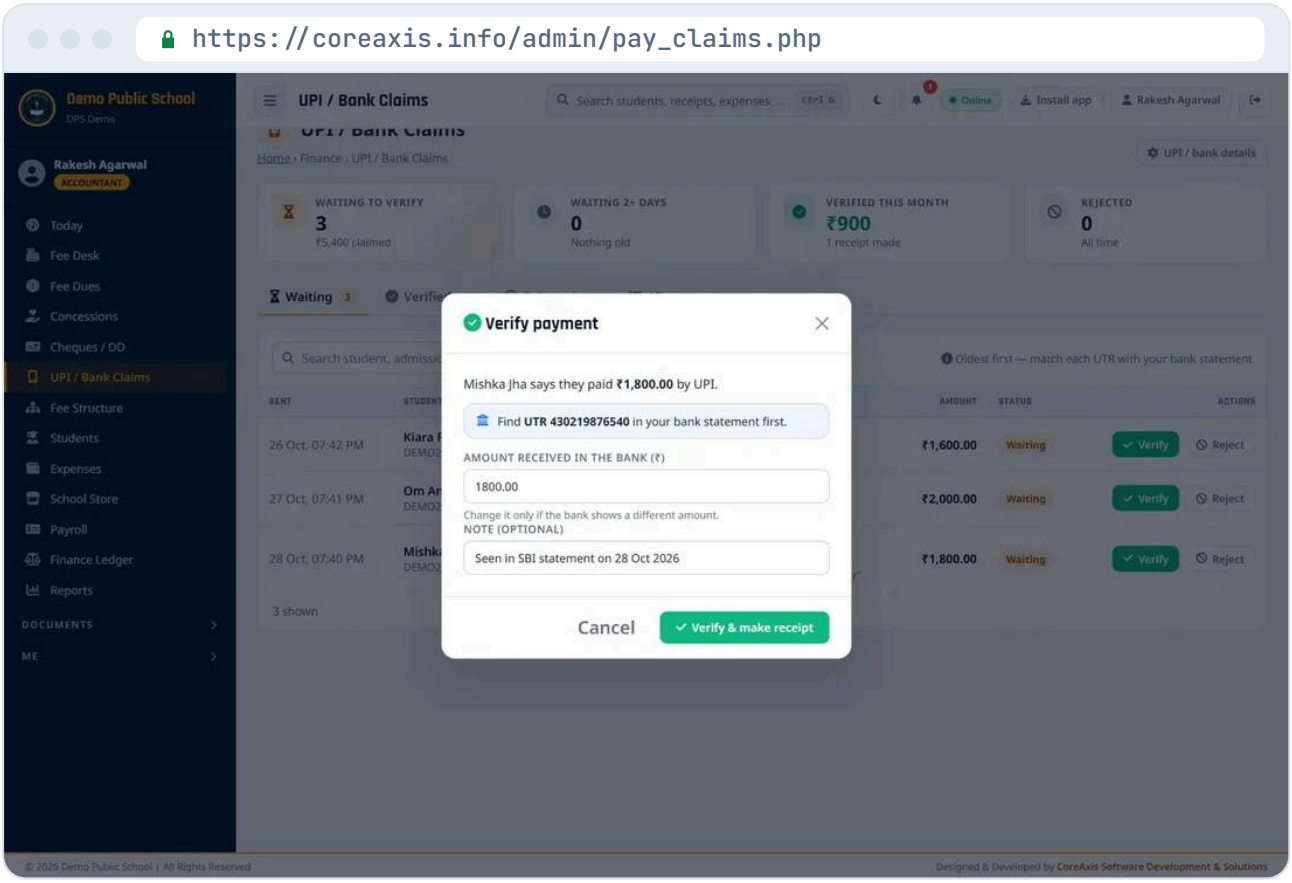


Match this UTR with the bank statement.

3 Open the school's bank statement (net banking or the bank app) and find a credit with the same UTR and amount.

4 Click **Verify** on the row.

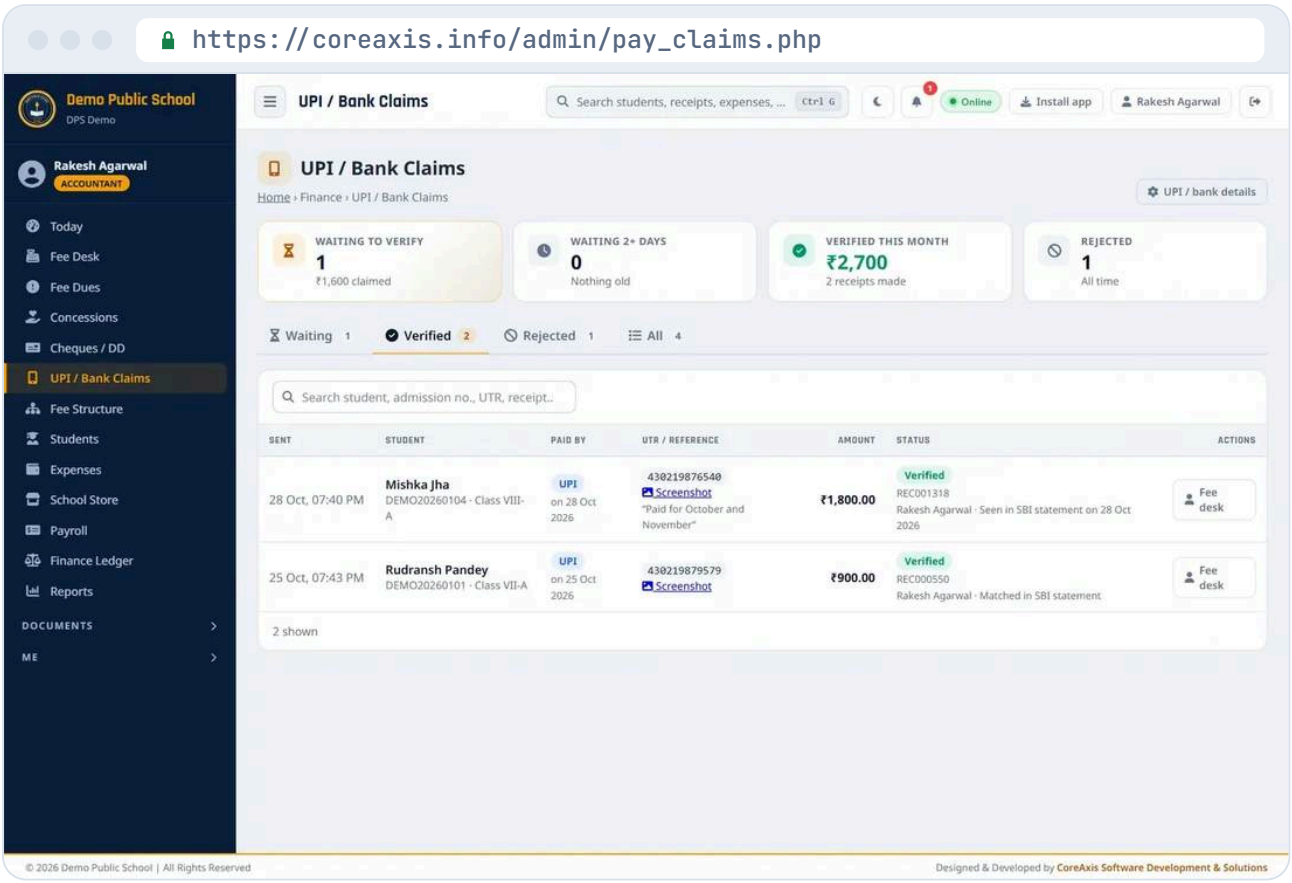
5 Check **Amount received in the bank (₹)**. Change it only if the bank shows a different amount. Type a **Note (optional)**, for example `Seen in SBI statement on 28 Oct 2026`.



The verify window repeats the UTR to look for.

6 Click **Verify & make receipt**, then **Verify & make receipt** again in the popup.

7 The message shows the new receipt number. The claim moves to **Verified** with the receipt number, and the student's dues go down.



Verified claims with receipt numbers.

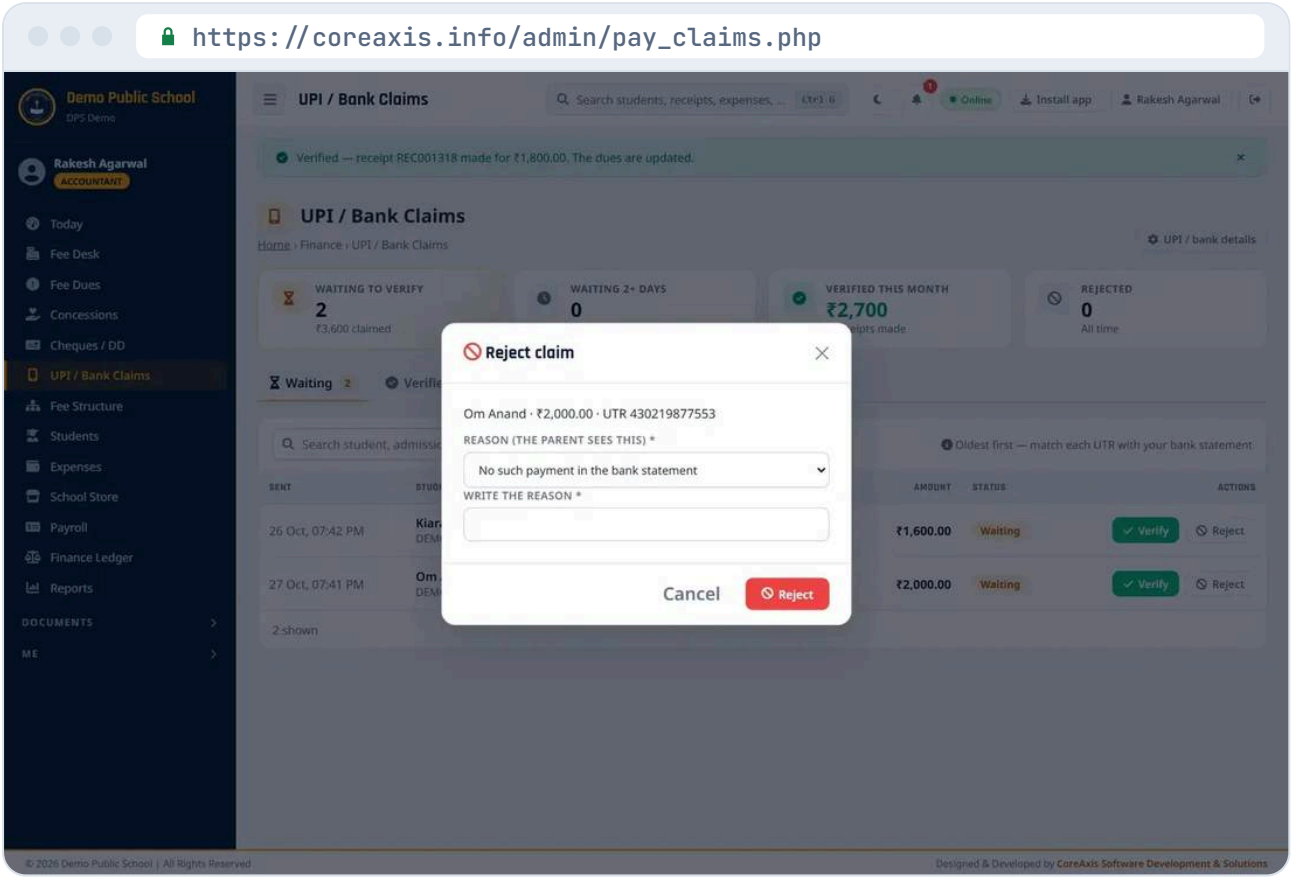
TIP The parent sees the receipt in the portal and app straight away.

Reject a claim (example: Om Anand, Class VIII-A, ₹2,000, UTR not in the statement)

1 Search the bank statement for UTR **430219877553**. It is not there.

2 Click **Reject** on Om Anand's row.

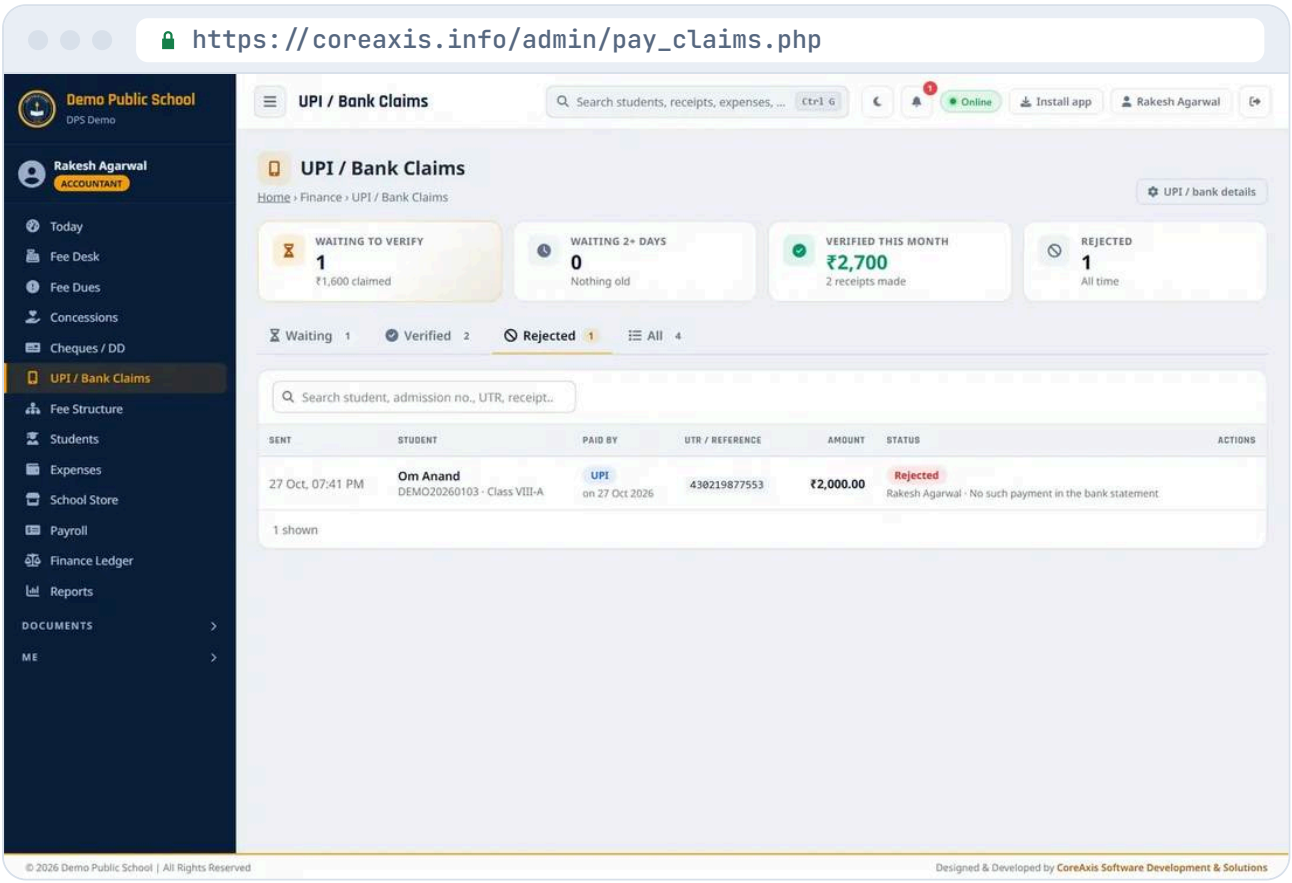
3 Choose **Reason (the parent sees this)**: **No such payment in the bank statement**. Other reasons: Amount does not match, UTR / reference number is wrong, Paid to a different account, Duplicate of an earlier claim, Other (write your own).



The parent sees the reason you choose.

4 Click **Reject**, then **Reject claim**, then **Yes, proceed** in the second popup.

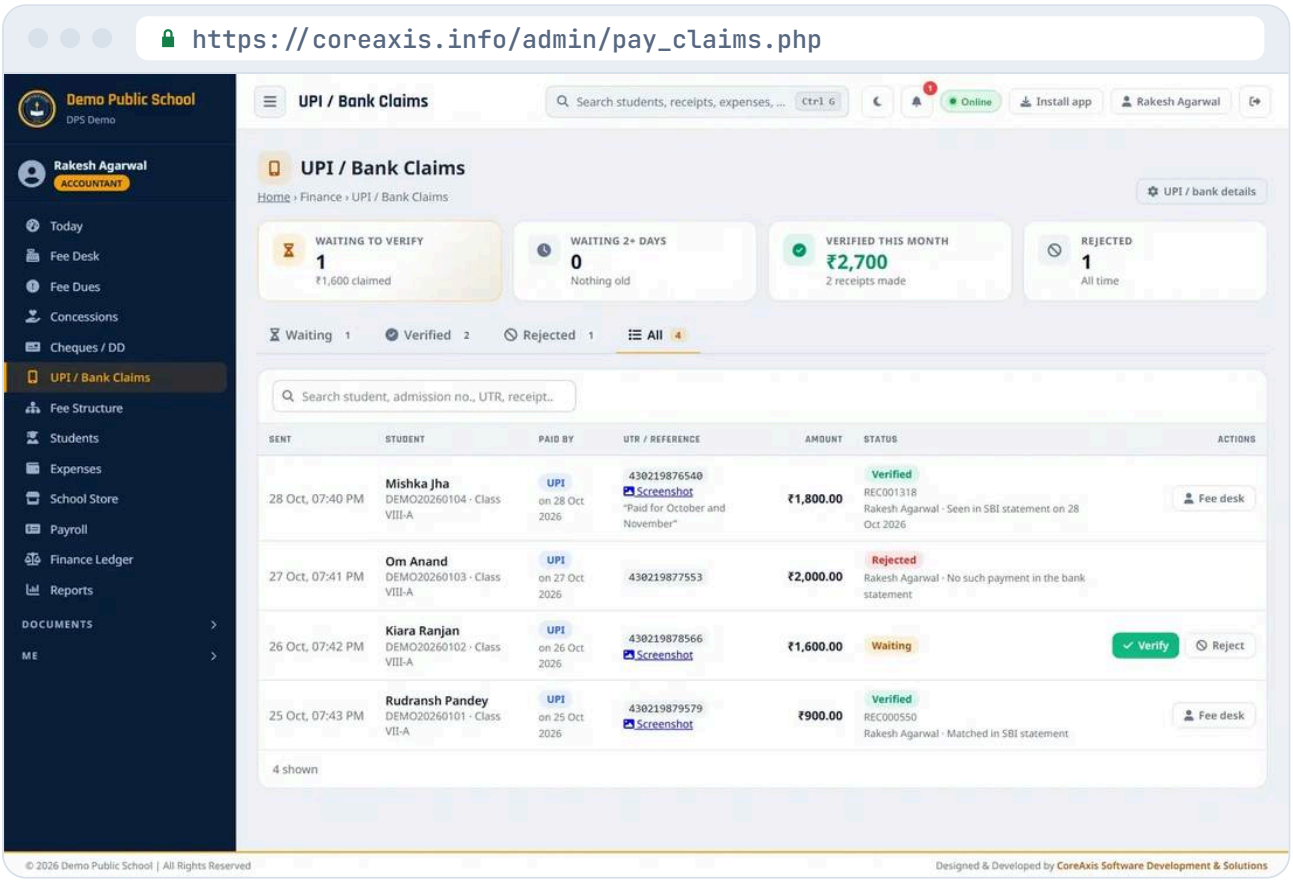
5 The claim moves to **Rejected**. No receipt is made; the parent can send a corrected claim.



Rejected claim with the reason.

See all claims

1. Open the **All** tab to see waiting, verified and rejected claims together. Kiara Ranjan's claim is still **Waiting** for the bank statement to be checked.



All claims with their status.

Questions

The parent paid ₹1,800 but the bank shows ₹1,500.

Verify with ₹1,500 in Amount received in the bank and write a note. The receipt is made for ₹1,500, and the rest stays due.

Where do parents get the QR code?

In the parent portal and app, when UPI / bank transfer is switched on in Online Payment. The amount and admission no. are filled in for them.

Does the school pay a fee on these payments?

No. The money goes straight to the school's account. Only the Razorpay gateway charges a fee.

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Can a parent send a second claim for the same dues by mistake?

The portal makes it unlikely. While a claim is waiting, the parent's Fees page shows the amount being checked and only what is left to pay, and Pay by UPI starts at that amount (₹0 when the claim covers the dues). If a duplicate still arrives, reject it with the reason Duplicate of an earlier claim.

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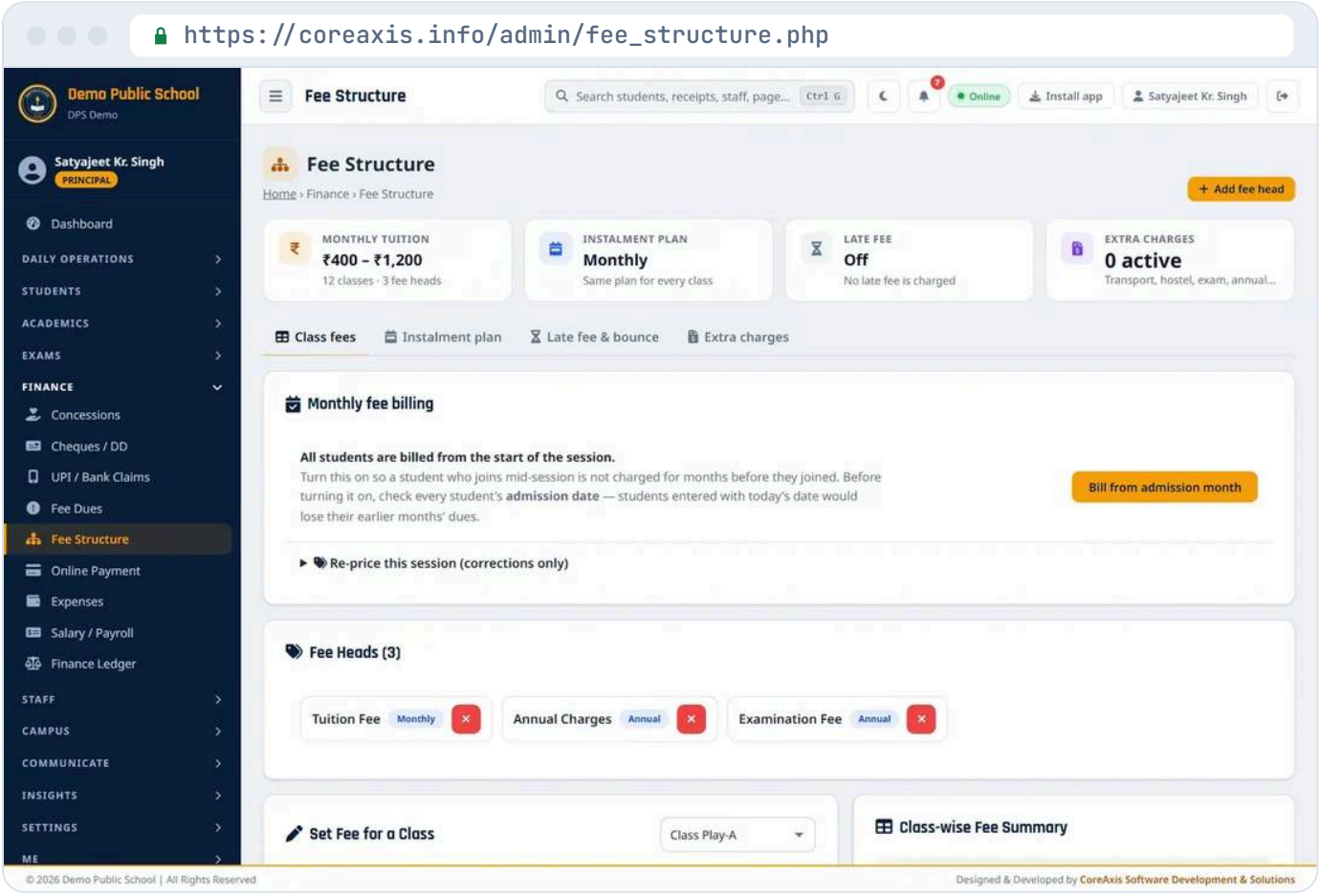
FINANCE · CHAPTER 29

Fee Structure

Admin | Principal | Accountant (view only)

MENU Finance › Fee Structure (Accountant: Fee Structure)

Fee Structure decides what every student is billed: the fee heads, the amount of each head for each class, whether tuition is billed monthly or in instalments, the late-fee rule, the cheque bounce charge and extra charges such as exam fee, transport or hostel. Admin / Principal can change it; accountants can see it but not save changes. Changes affect every student's dues, so plan them before the session starts.



Fee Structure — Demo Public School

Screen at a glance

Monthly tuition	Lowest to highest monthly tuition across classes (₹400 – ₹1,200), number of classes and fee heads.

Instalment plan	How tuition is billed: Monthly, Quarterly, Termly, Half-yearly, Annual or Custom.
Late fee	On or Off, with the rule.
Extra charges	Number of active extra charges (transport, hostel, exam, annual …).
Class fees tab	Fee Heads list, Set Fee for a Class and the Class-wise Fee Summary.
Instalment plan tab	School plan and a different plan for some classes.
Late fee & bounce tab	Late-fee rule and the Cheque / DD bounce charge.
Extra charges tab	One-time or monthly charges for all students, a class, one student, a transport route or hostel students.
Add fee head (button)	Creates a new head such as Smart Class Fee (Admin / Principal).

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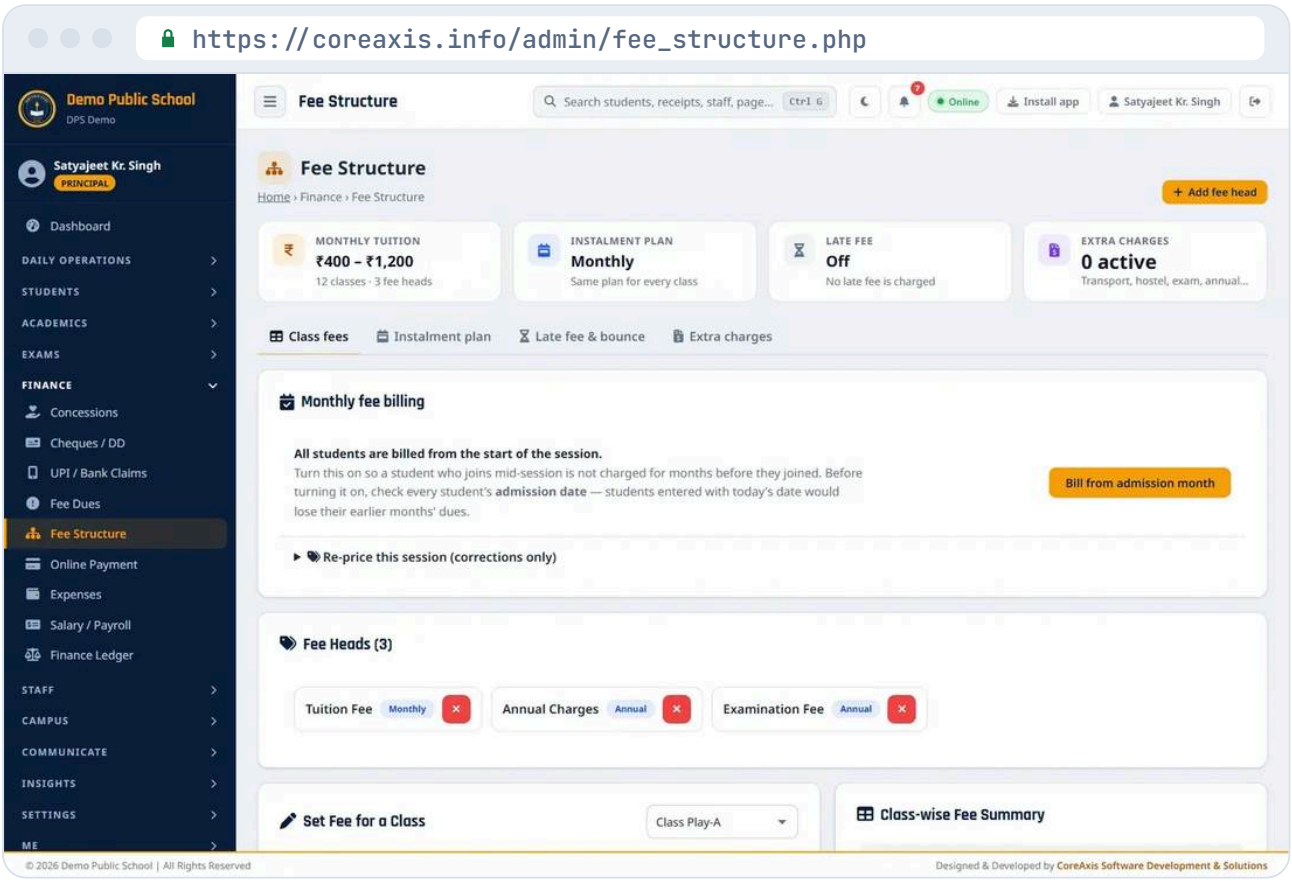
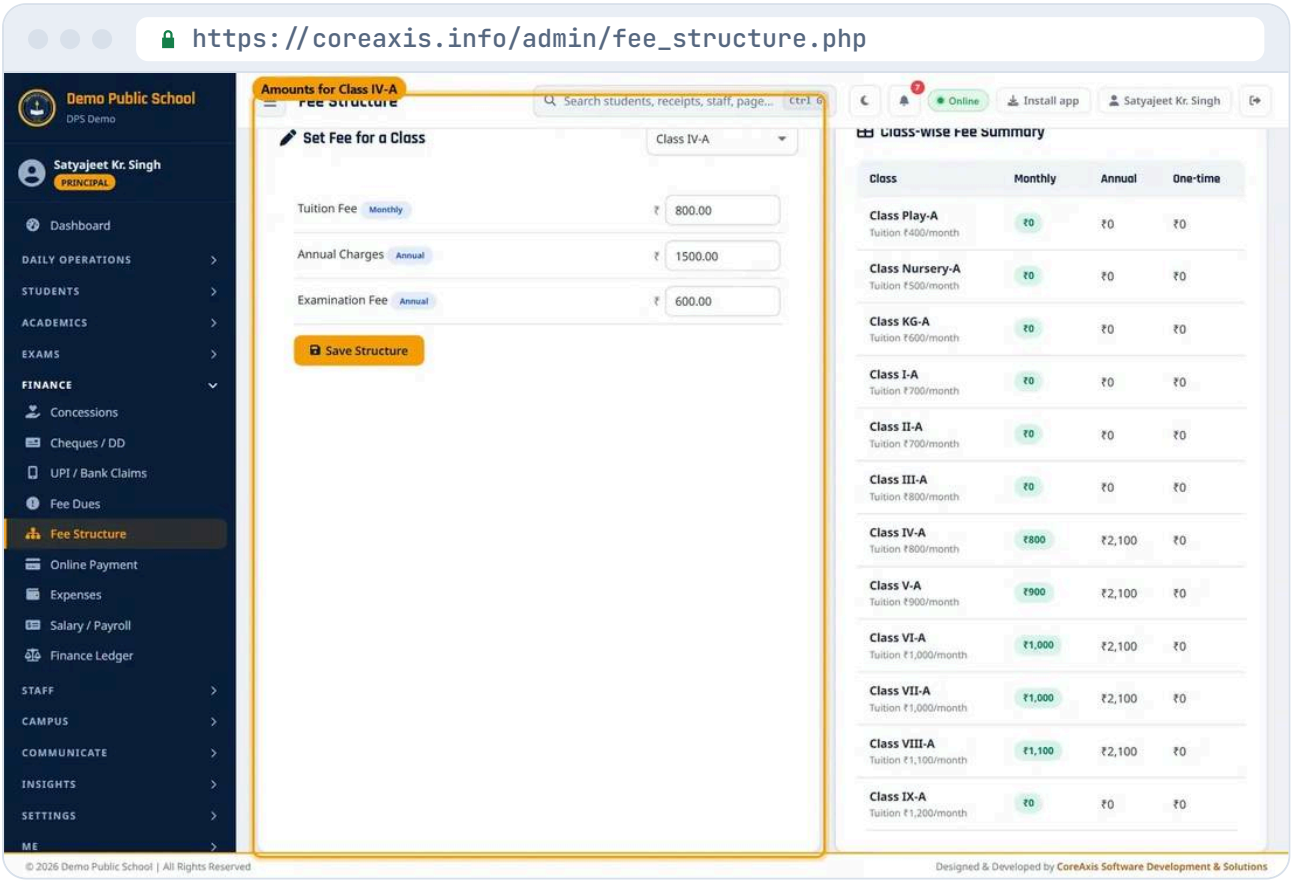
See and set the fees of a class (example: Class IV-A)

1 Open **Fee Structure**. The **Class fees** tab opens first. Until you choose a class, **Set Fee for a Class** says "Choose a class above to set its fees."



KPI cards and the four tabs.

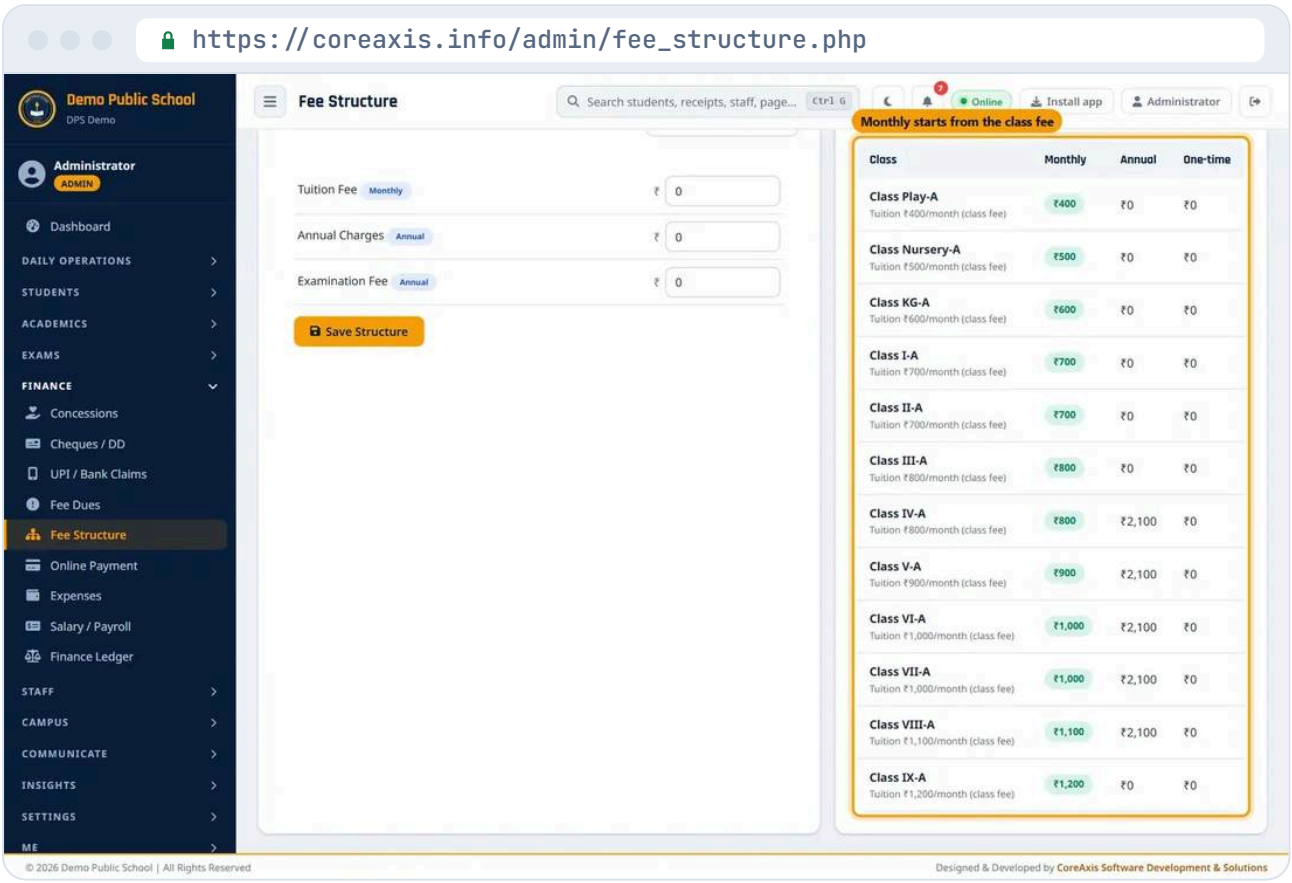
2 In **Set Fee for a Class**, choose **Class IV-A**. Each fee head shows its amount: Tuition Fee (Monthly) ₹800, Annual Charges (Annual) ₹1,500, Examination Fee (Annual) ₹600.



Amounts of each head for Class IV-A.

3 To change an amount, type the new figure and click **Save Structure**, then **Confirm** (Admin / Principal).

4 Check the **Class-wise Fee Summary** on the right. Under each class name you see its monthly tuition from the Classes page, for example "Tuition ₹800/month (class fee)". The **Monthly** column starts from that class fee and adds any other monthly heads (quarterly heads ÷ 3); **Annual** and **One-time** add up the heads set for that class (Class IV-A: Monthly ₹800, Annual ₹2,100).



Summary of all classes: Monthly starts from each class's tuition fee.

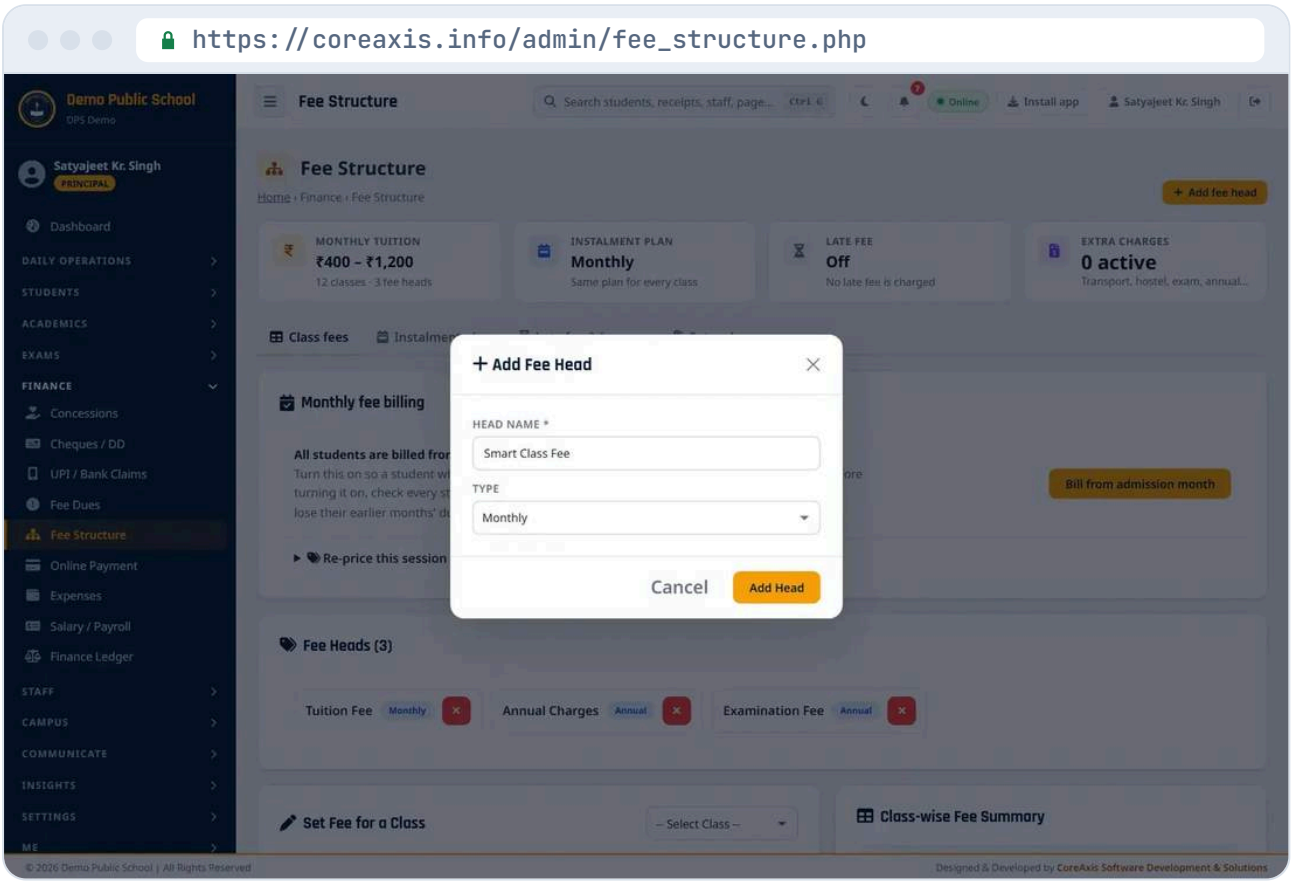
TIP Months already billed keep their old price. Admin can use the re-price option on this tab to change months already billed for a class.

TIP Monthly tuition is billed from the class's monthly fee (Academics › Classes). A Tuition Fee head here is the same fee, not an extra one; if its amount differs from the class fee, the summary shows a warning under the class name.

Add a fee head (example: Smart Class Fee, monthly)

1 Click **Add fee head**, then **Add fee head** in the popup.

2 Type the **Head name**, for example `Smart Class Fee`, and choose its type: Monthly, Quarterly, Annual or One-time.



New fee head form.

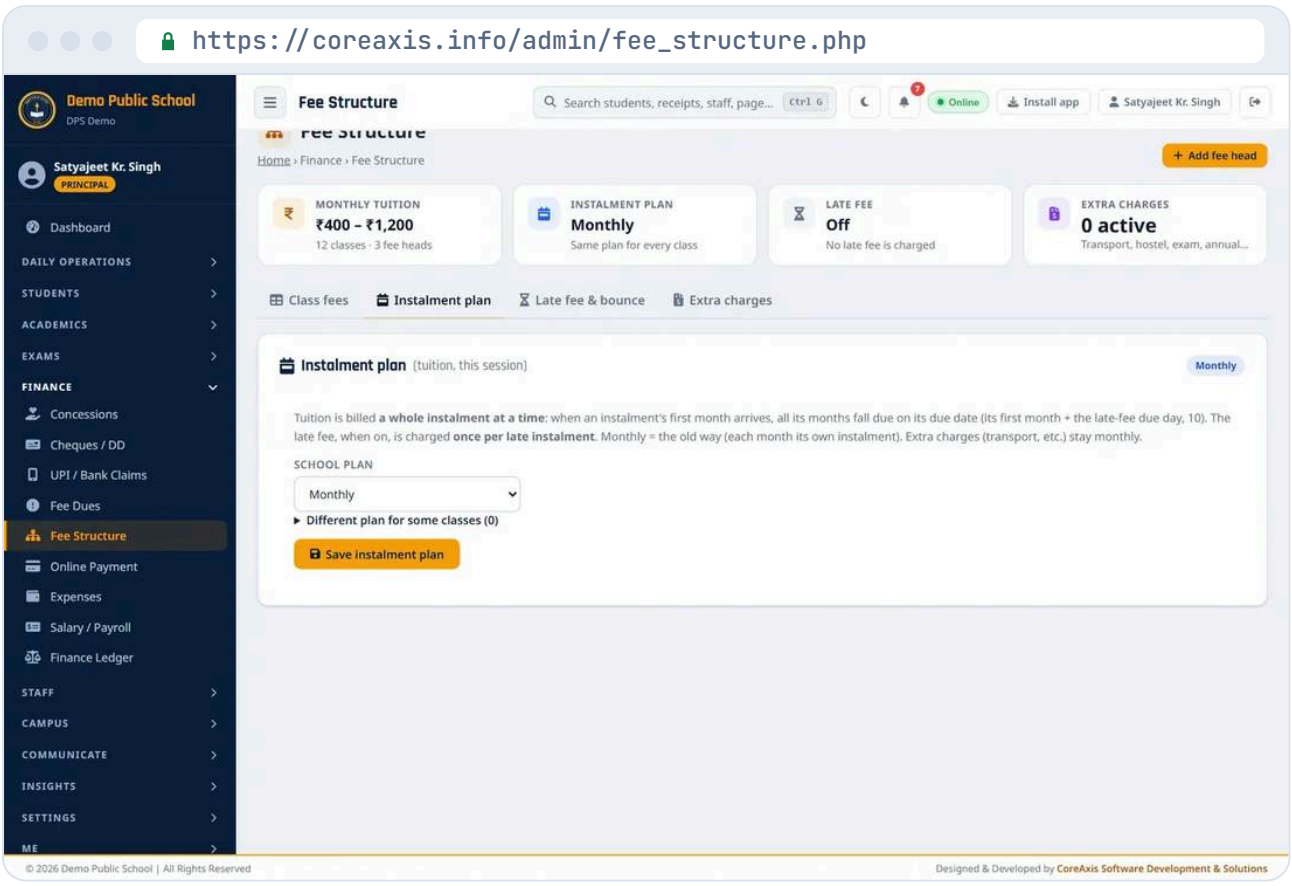
3 Click **Add Head** and confirm. The message "Fee head added. It can now be collected at the Fee Desk." appears. Then set its amount for each class in **Set Fee for a Class**.

TIP Every Fee Structure head is also a **Fee head** at the Fee Desk, so the office can collect it there (Annual Charges, Examination Fee, Smart Class Fee ...).

IMPORTANT Deleting a fee head is permanent. Do it only for a head that was created by mistake.

Instalment plan

1. Open the **Instalment plan** tab.



School plan and class-wise plans.

2. Choose the **School plan**: Monthly, Quarterly (4 instalments), Termly (3), Half-yearly (2), Annual (1) or Custom (tick the months where an instalment starts). The demo school bills Monthly.

3. Under **Different plan for some classes**, choose another plan for a class if needed, for example Quarterly for Class VIII.

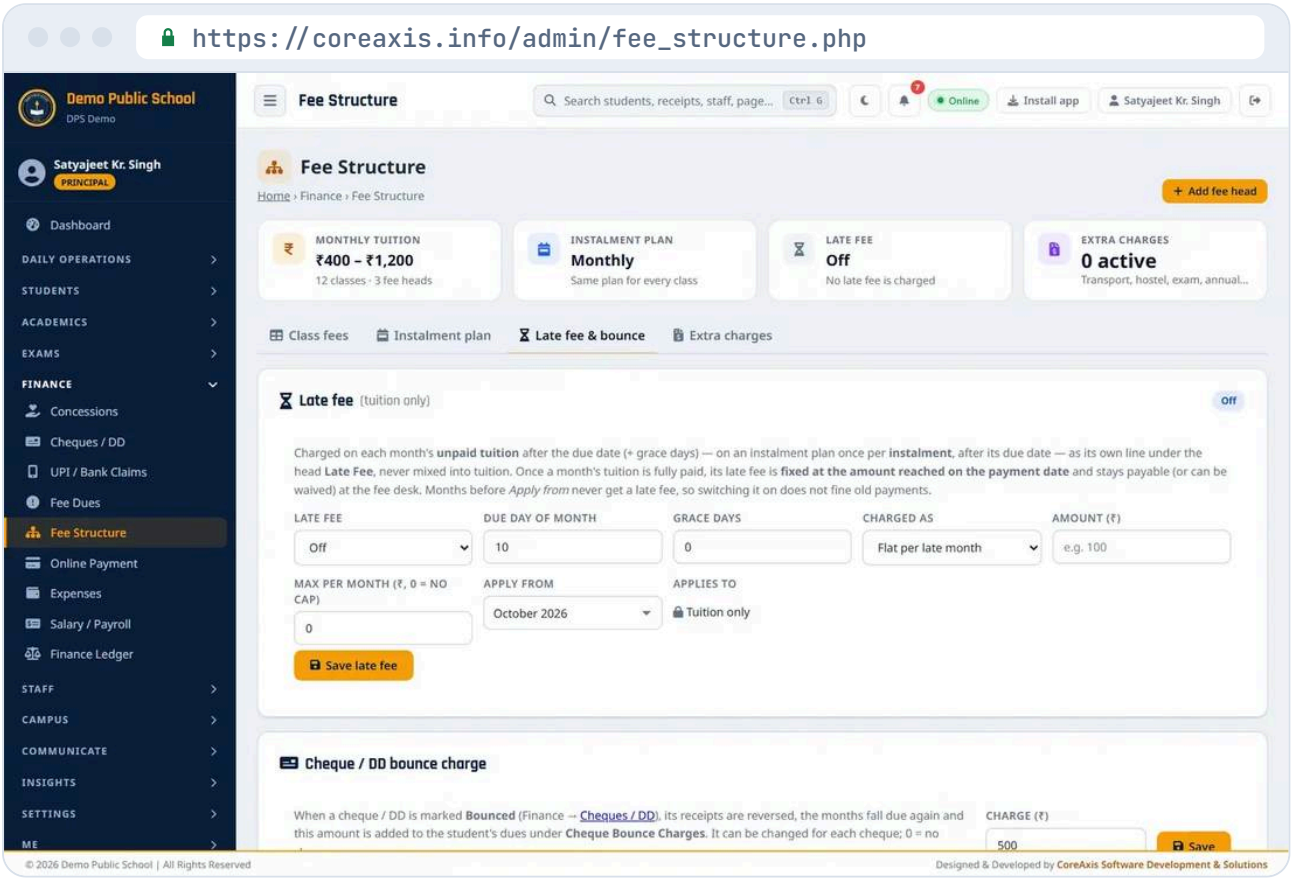
4. Click **Save instalment plan** and confirm. Every student's dues are rebuilt; money already paid stays as an advance.

> **TIP** With an instalment plan, all months of an instalment fall due together on its due date (its first month + the late-fee due day, 10). The Fee Desk then shows instalment chips instead of month chips.

Late fee rule (example: ₹50 per late month after the 15th, up to ₹200)

The demo school has the late fee switched off. The example below shows how a school would fill it.

1. Open the **Late fee & bounce** tab.



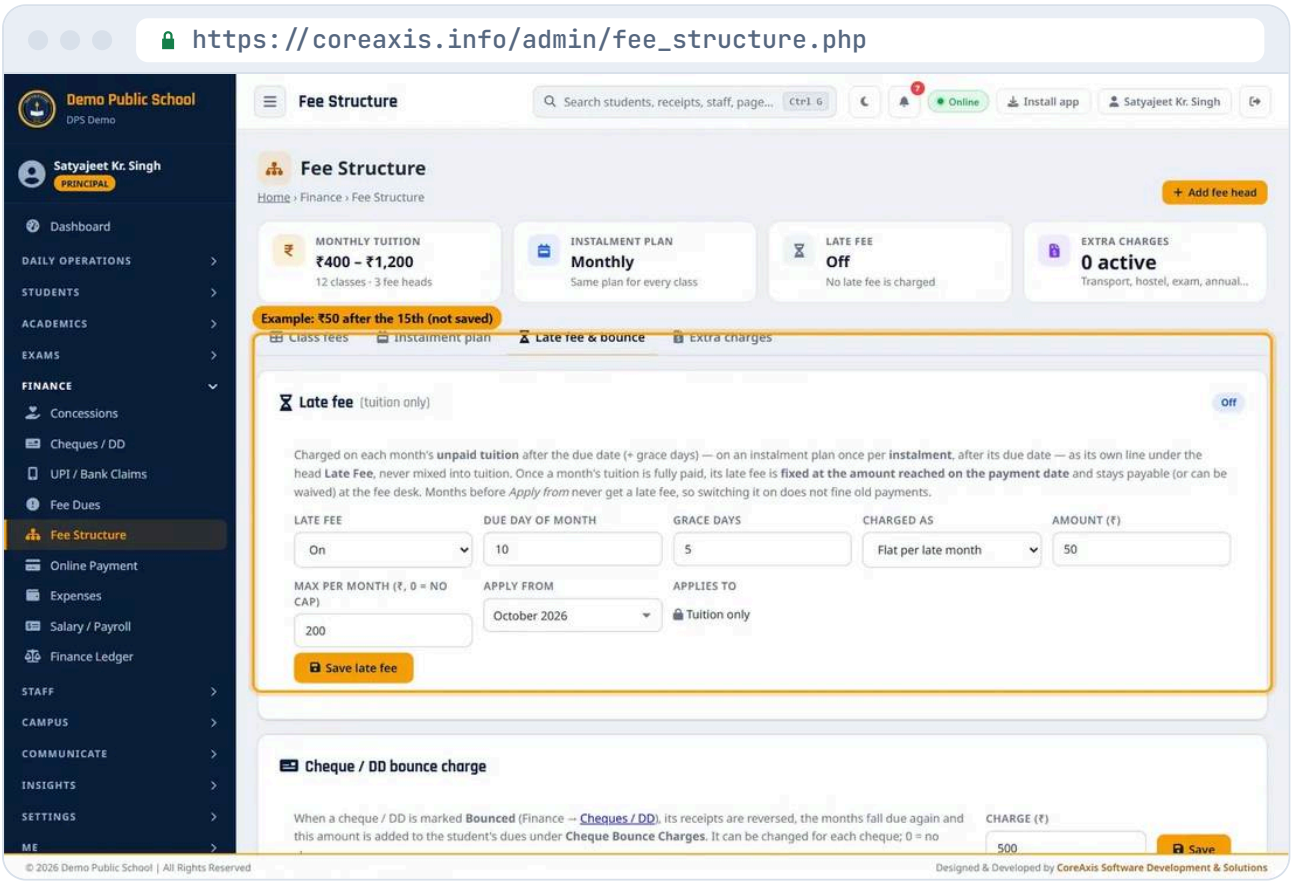
Late fee (Off) and the cheque bounce charge (₹500).

2. Set **Late fee** to **On**.

3. Type **Due day of month** `10` and **Grace days** `5`. The late fee starts after the 15th.

4. Choose **Charged as**: **Flat per late month** (or Per day late) and type **Amount (₹)** `50`.

5 Type **Max per month (₹, 0 = no cap)** `200` and choose **Apply from**, for example October 2026.



Example late-fee rule (not saved in the demo school).

6 Click **Save late fee** and confirm. Every student's late-fee lines are recalculated.

> **TIP** The late fee is charged on tuition only, as its own Late Fee line. Months before Apply from never get a late fee. Admin can waive a late fee at the Fee Desk.

Cheque bounce charge

1 On the **Late fee & bounce** tab, find **Cheque / DD bounce charge**.

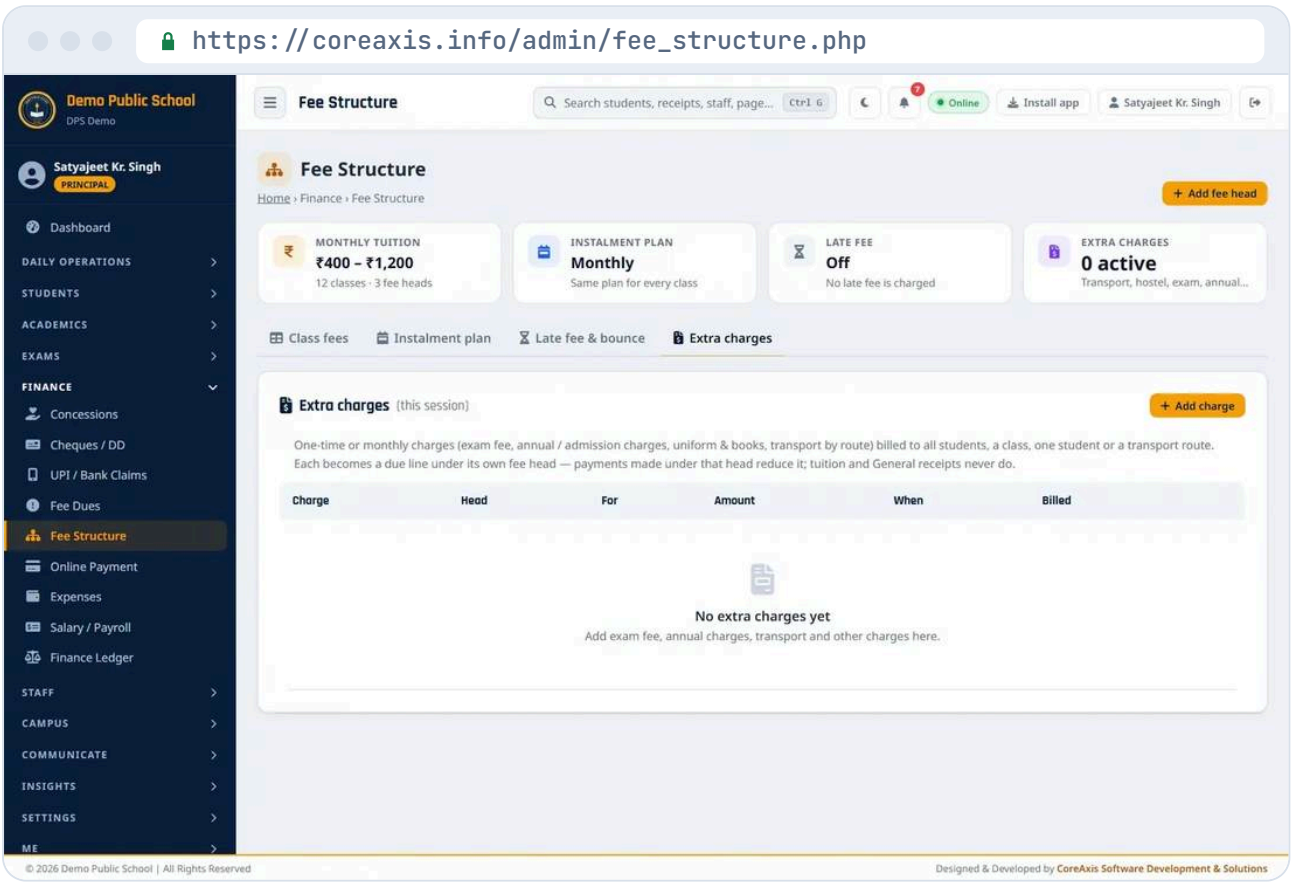
2 Type the **Charge (₹)** (₹500 in the demo school; 0 = no charge) and click **Save**.

3 The office can still change the charge for a single cheque when it records the bounce.

Add an extra charge (example: Half-Yearly

Exam Fee ₹300 for Class V in November)

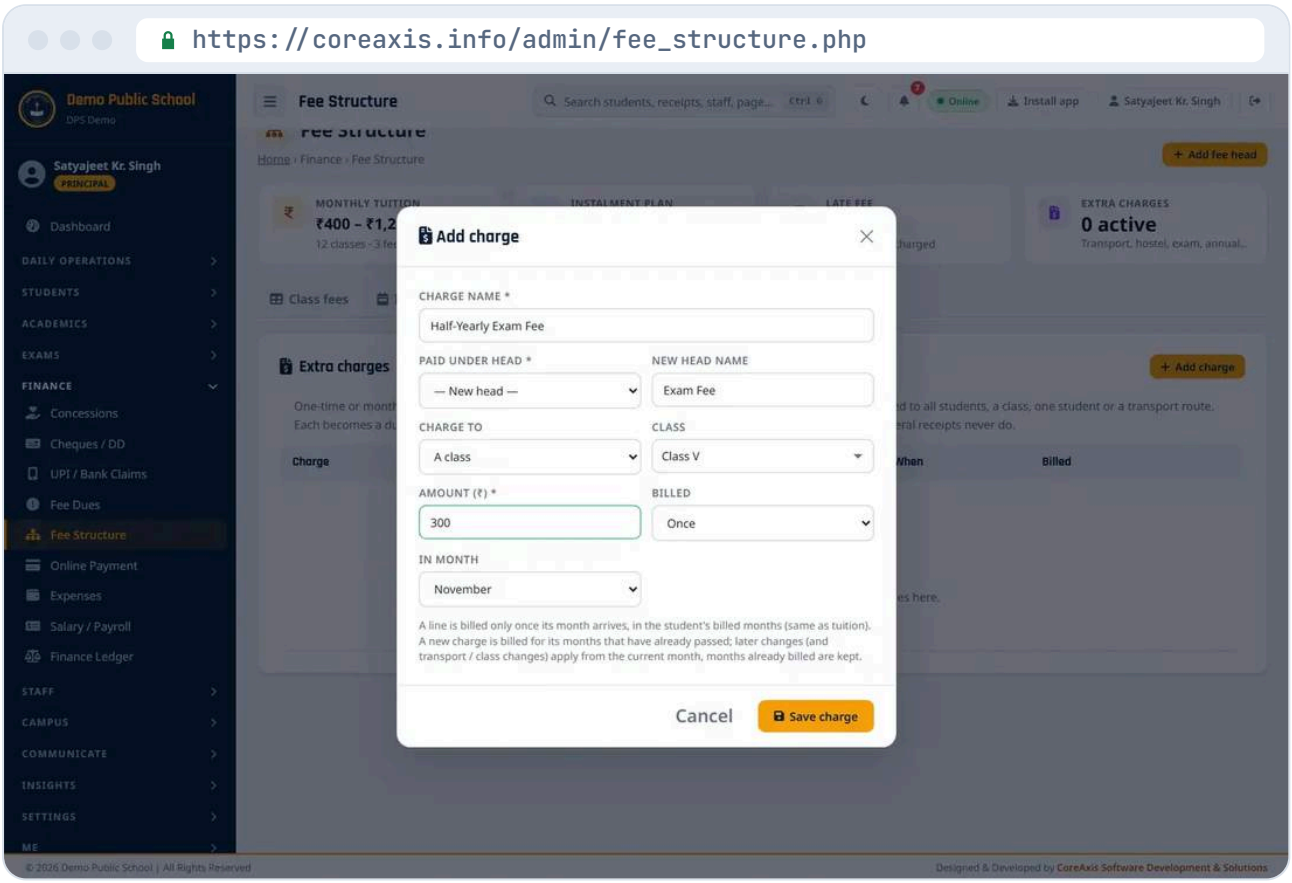
1. Open the **Extra charges** tab and click **Add charge**.



Extra charges list (empty in the demo school).

2. Type **Charge name** `Half-Yearly Exam Fee`.
3. In **Paid under head**, choose an existing head or **— New head —** and type `Exam Fee` in **New head name**.
4. Set **Charge to A class** and choose **Class V**. Other choices: All students, One student (admission no.), a transport route (fixed amount or each student's route fare) or hostel students (room fee).

5 Type **Amount (₹)** `300`, set **Billed** to **Once** and **In month** to **November**. For a monthly charge choose **Every month** with a first and last month.



The filled Add charge form.

6 Click **Save charge** and confirm. Each student of Class V gets a ₹300 line in November under Exam Fee.

> **TIP** Use the pause icon to stop billing a charge from this month; months already billed stay. Payments under tuition never reduce an extra charge, and the other way round.

Questions

Can an accountant change the fee structure?

No. Accountants can view it. Only the Principal or an Admin can save changes.

We raised the tuition from October. Will April–September change?

No. Months already billed keep their price. New months use the new amount.

How is transport fee billed?

Add an extra charge with Charge to = Transport route and Amount = Each student's route fare. It is billed monthly to students assigned to a route.

Why do the Fee Desk and Fee Structure show the same heads?

They share one list. A head added here is added to the Fee Desk's Fee head list at once, so any head you bill can also be collected.

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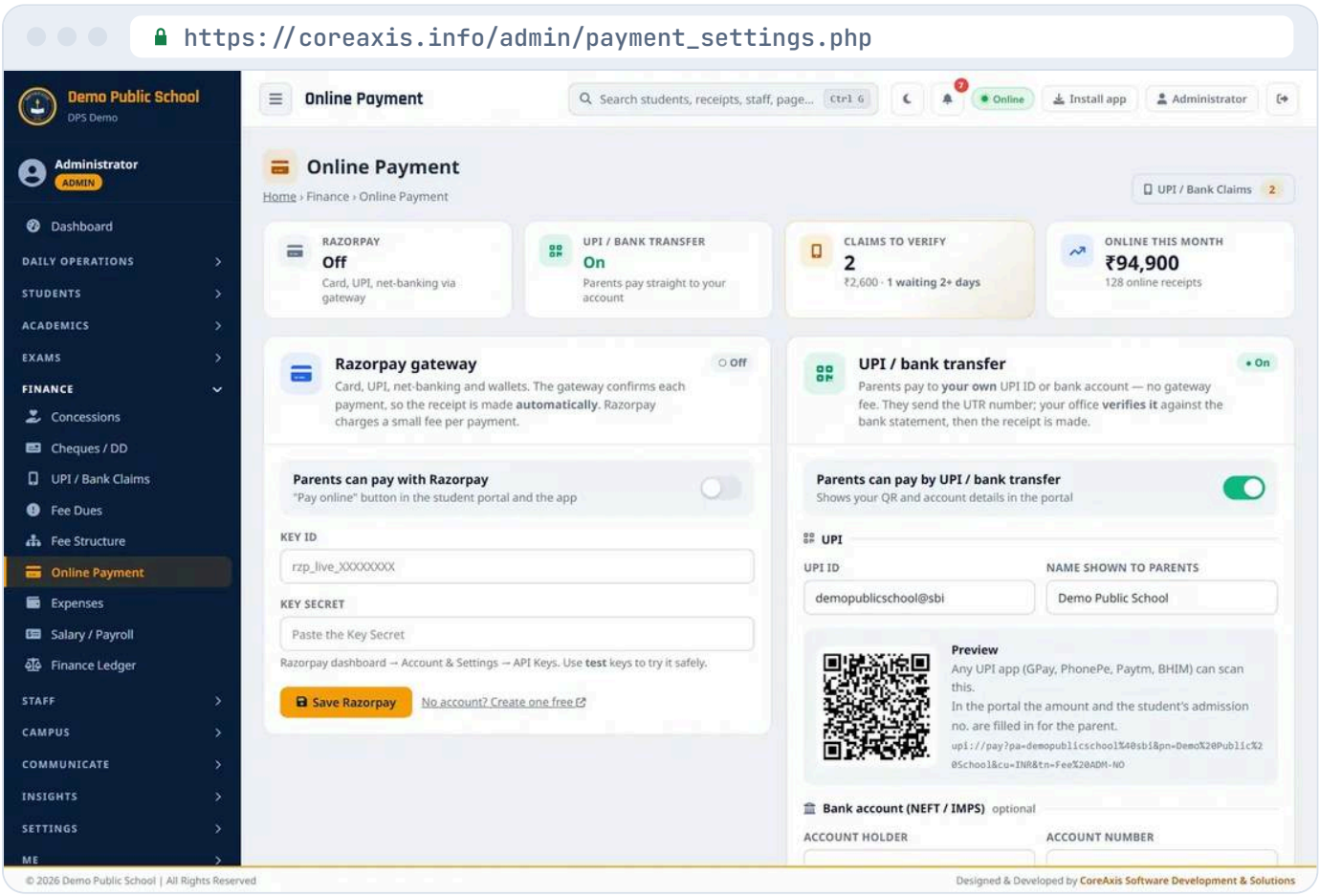
FINANCE · CHAPTER 30

Online Payment

Admin Principal MENU Finance › Online Payment

This page decides how parents can pay from the portal and the app. UPI / bank transfer sends the money straight to the school's own account with no gateway fee; the office then verifies the parent's claim in UPI / Bank Claims. The Razorpay gateway accepts cards, UPI, net-banking and wallets and makes the receipt automatically, but Razorpay charges a small fee per payment. Only Admin / Principal see this page.



Online Payment — Demo Public School

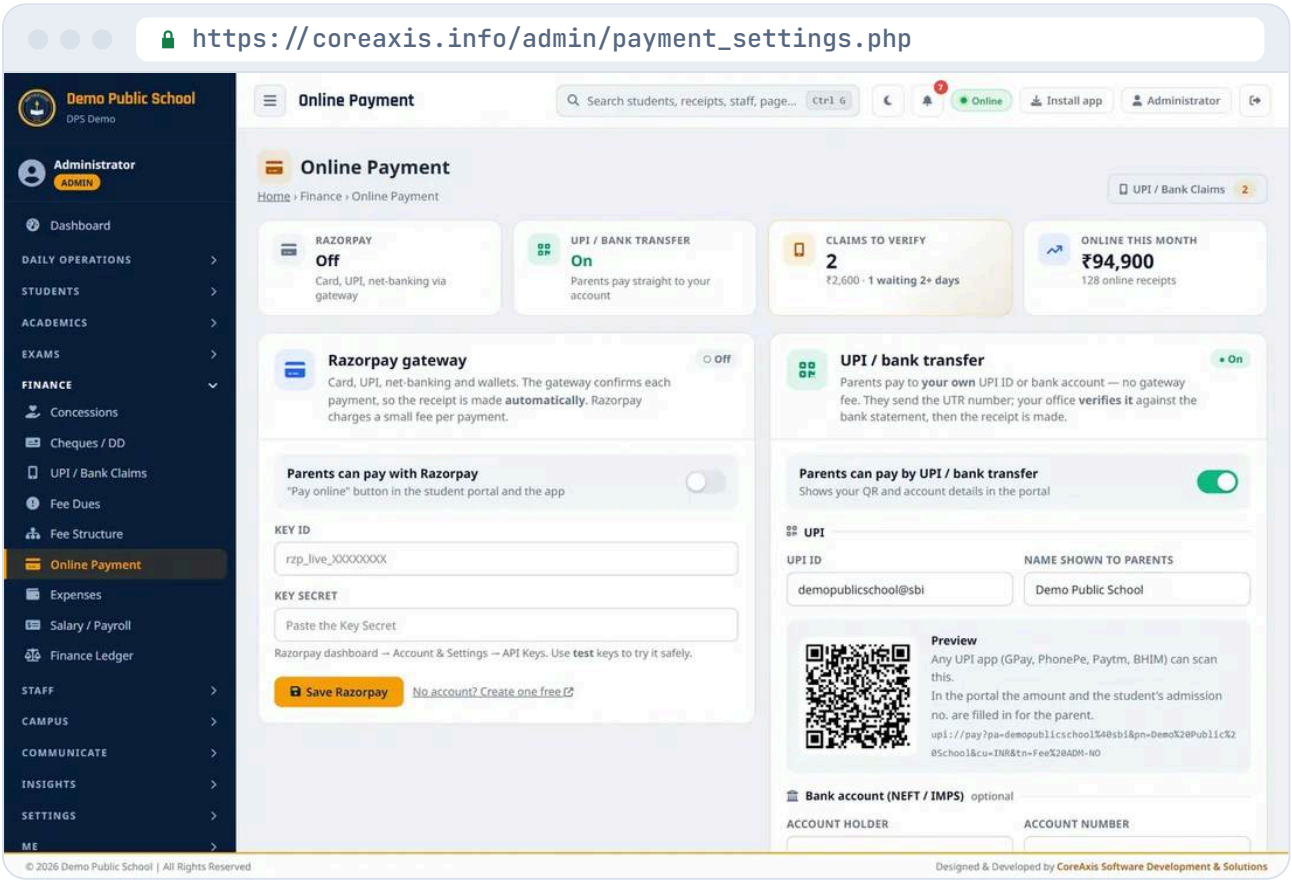
Screen at a glance

Razorpay	On or Off.
UPI / bank transfer	On or Off.

Claims to verify	Parent claims waiting in UPI / Bank Claims, with the amount.
Online this month	Online receipts this month.
UPI / Bank Claims (button)	Opens the claims page; the number shows claims waiting.
How a UPI / bank payment works	Four steps: parent pays, parent sends the UTR, office checks, verify makes the receipt.
Latest online payments	Recent online receipts (UPI verified or gateway), with a link to the Bank Book.

Set the UPI ID and QR for parents (example: demopublicschool@sbi)

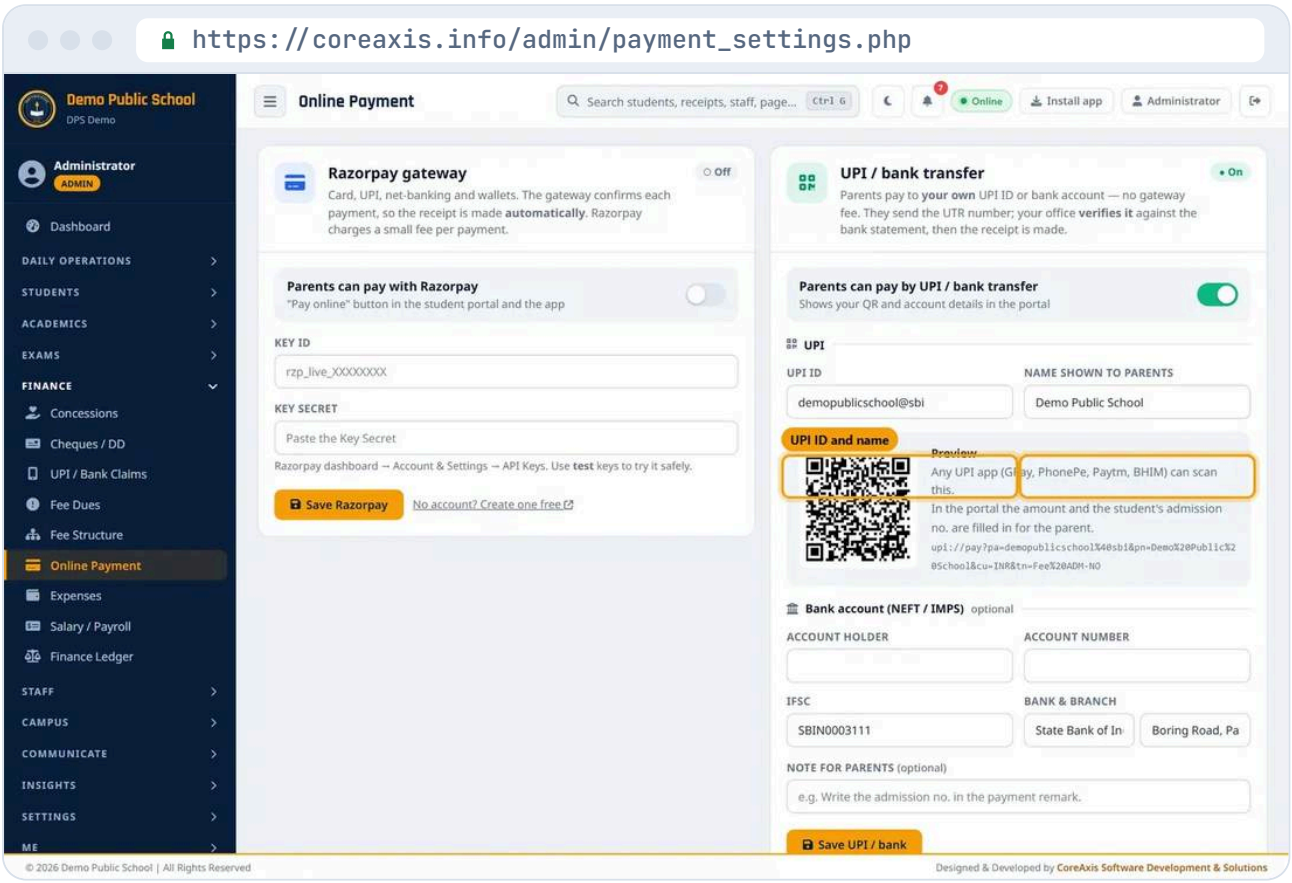
1 Open **Online Payment**.



Online Payment with the Razorpay and UPI / bank transfer cards.

2 In **UPI / bank transfer**, switch on **Parents can pay by UPI / bank transfer**.

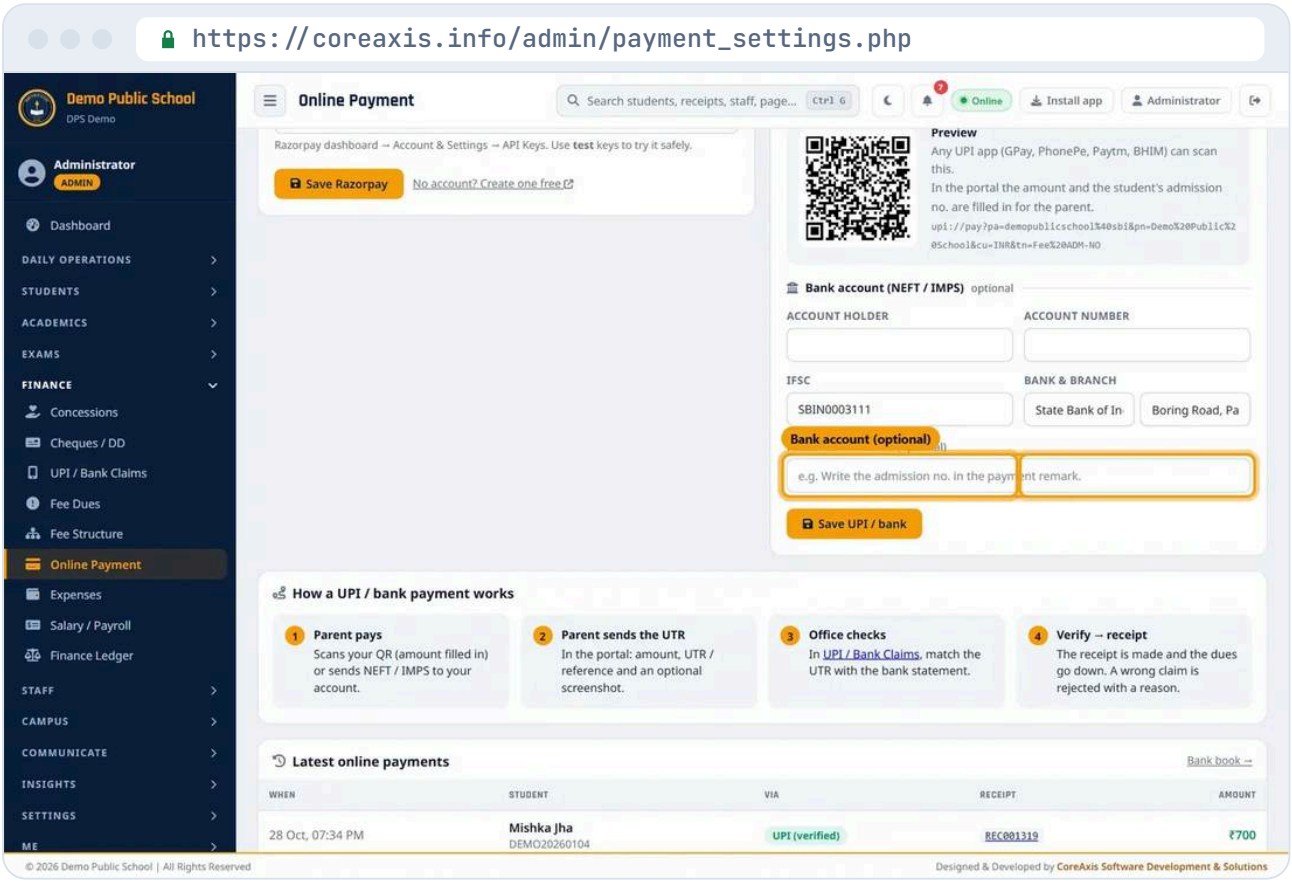
3 Type the school's **UPI ID**, for example `demopublicschool@sbi`, and **Name shown to parents**, `Demo Public School`.



UPI ID and name, with a live QR preview.

4 Check the **Preview**. Scan the QR with your own UPI app to make sure the school's name appears. In the portal the amount and the student's admission no. are filled in for the parent.

5 Optionally fill **Bank account (NEFT / IMPS)**: **Account holder**, **Account number**, **IFSC**, **Bank & branch**, and a **Note for parents** such as `Write the admission no. in the payment remark.`



Bank details are optional.

6 Click **Save UPI / bank** and confirm.

> **TIP** Use only the school's own current account UPI ID, never a staff member's personal UPI.

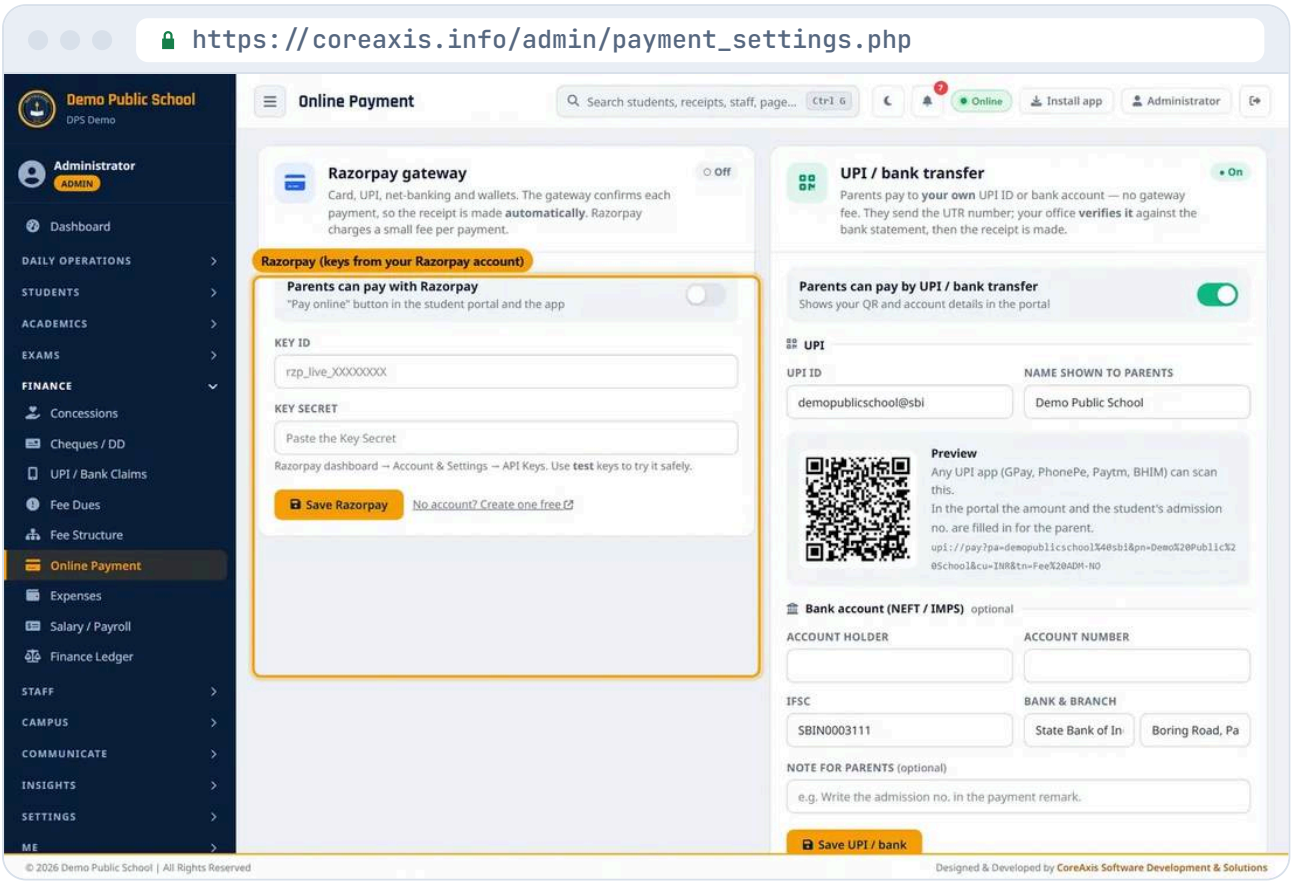
Razorpay gateway

Razorpay is optional. It is Off in the demo school.

1 Create a Razorpay account (link **No account? Create one free**) and finish its KYC.

2 In the Razorpay dashboard open **Account & Settings › API Keys** and make a key pair.

3 Paste the **Key ID** and **Key Secret** here, switch on **Parents can pay with Razorpay** and click **Save Razorpay**. Try test keys first.



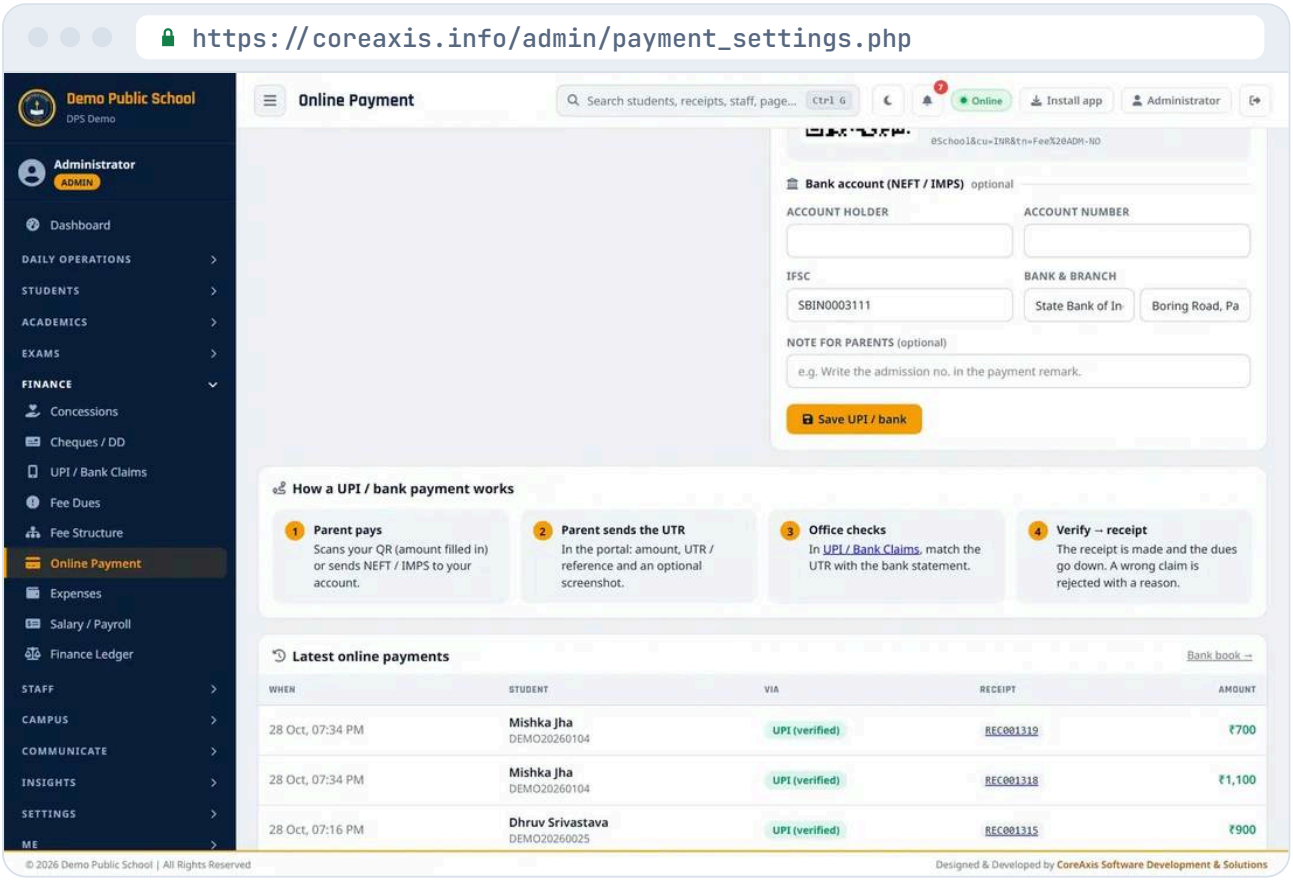
Razorpay section. Keys are entered by the school's Admin only.

4 Parents then see a **Pay online** button in the portal and the app. Each successful payment makes a receipt automatically.

IMPORTANT The Key Secret is like a password. Enter it yourself and never share it by message or email.

How a UPI / bank payment flows

1. Parent pays: scans your QR or sends NEFT / IMPS. Parent sends the UTR, amount and screenshot in the portal. Office checks the UTR in UPI / Bank Claims. Verify makes the receipt and lowers the dues.



The four steps and the latest online payments.

Questions

Can we use both UPI and Razorpay?

Yes. Parents then see both choices in the portal.

Why can't the accountant see this page?

Payment settings decide where the school's money goes, so only Admin / Principal can open them. Accountants work in UPI / Bank Claims.

A parent has a UPI claim waiting. What does Pay online offer?

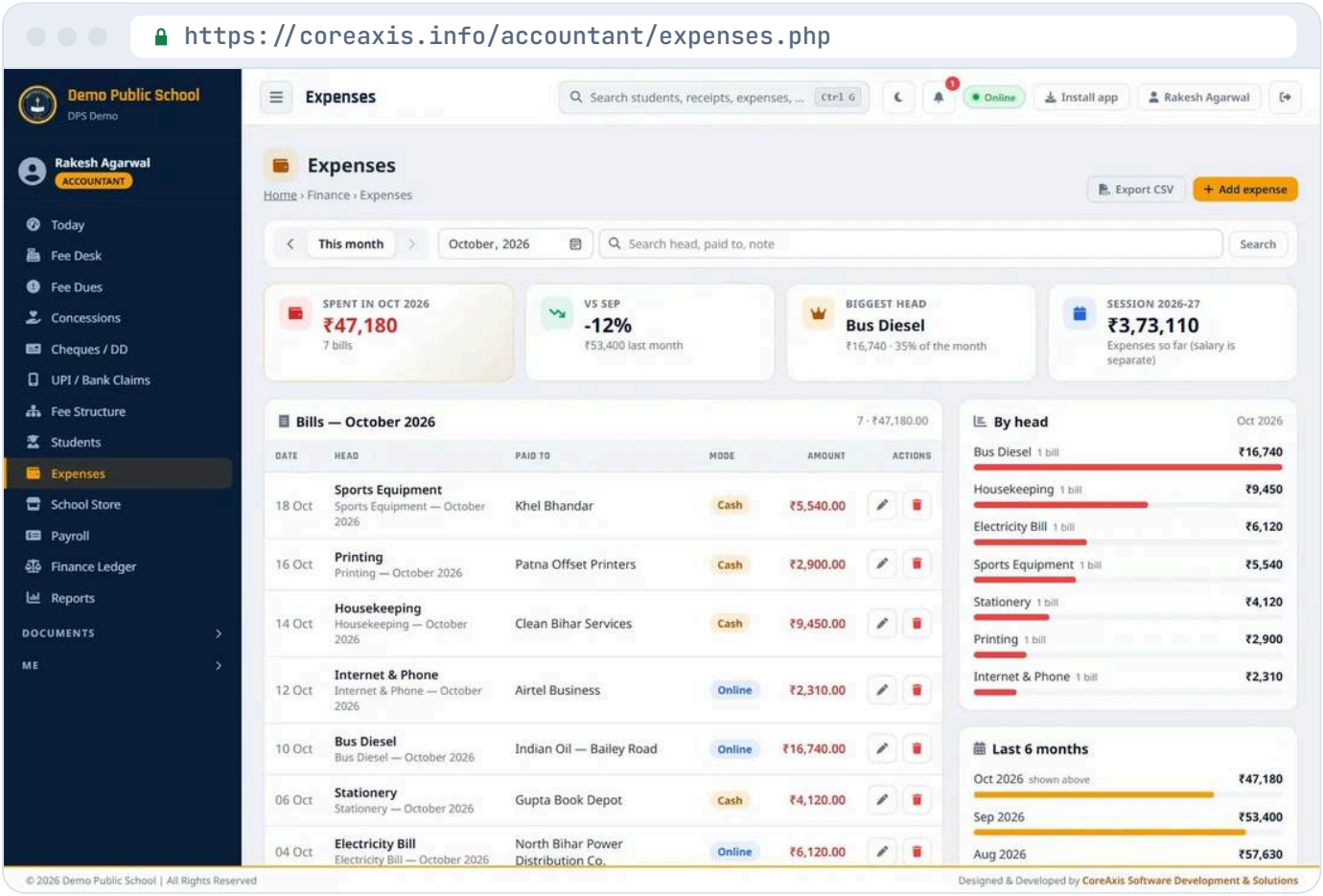
Only what is left after the claims being checked. If the waiting claim covers the dues, the portal says there is nothing more to pay for now.

FINANCE · CHAPTER 31

Expenses

Admin Principal Accountant MENU Finance › Expenses (Accountant: Expenses)

Expenses holds every bill the school pays, other than staff salary (salary is entered in Payroll). Each expense goes into the Cash Book or Bank Book and the Income & Expenditure statement. The page also shows the month's total, the biggest head and the last six months.



Expenses — Demo Public School

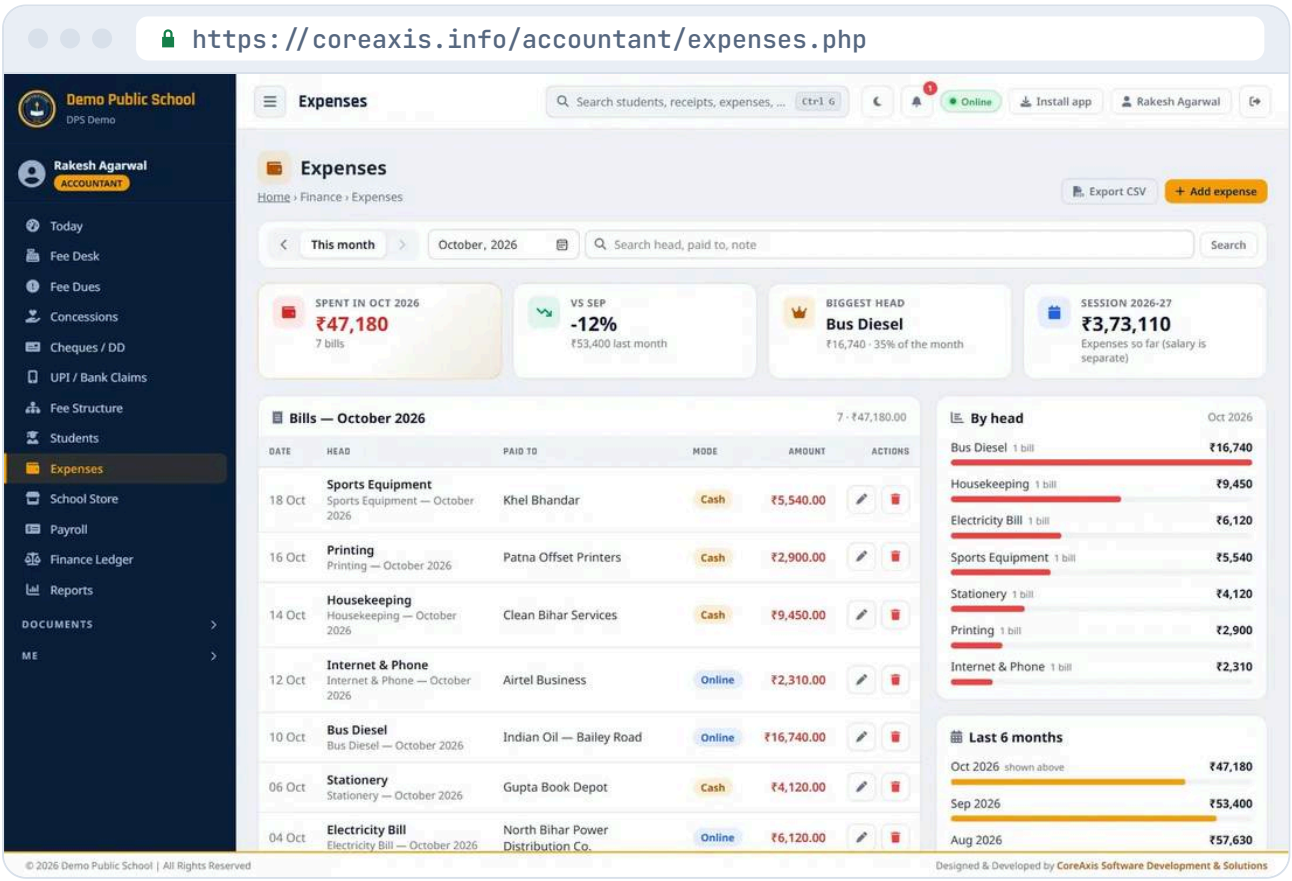
Screen at a glance

Month bar	Previous / next month arrows, This month, a month picker and a search box (head, paid to, note).
Spent in (month)	Total of the month and number of bills.
Vs (last month)	Change against the month before, in percent.

Biggest head	The head with the most spending this month and its share.
Session	Expenses so far this session (salary not included).
Bills table	Date, Head (with description), Paid to, Mode, Amount, Actions (edit, delete).
By head	Spending per head for the month. Click a head to filter.
Last 6 months	Month totals. Click a month to open it.
Paid by	Cash against Online / Cheque.
Export CSV	Downloads the bills of the selected month.

Add an expense (example: Diwali decoration, ₹3,450 cash)

1. Open **Expenses** and click **Add expense**, then **Add expense** in the popup.



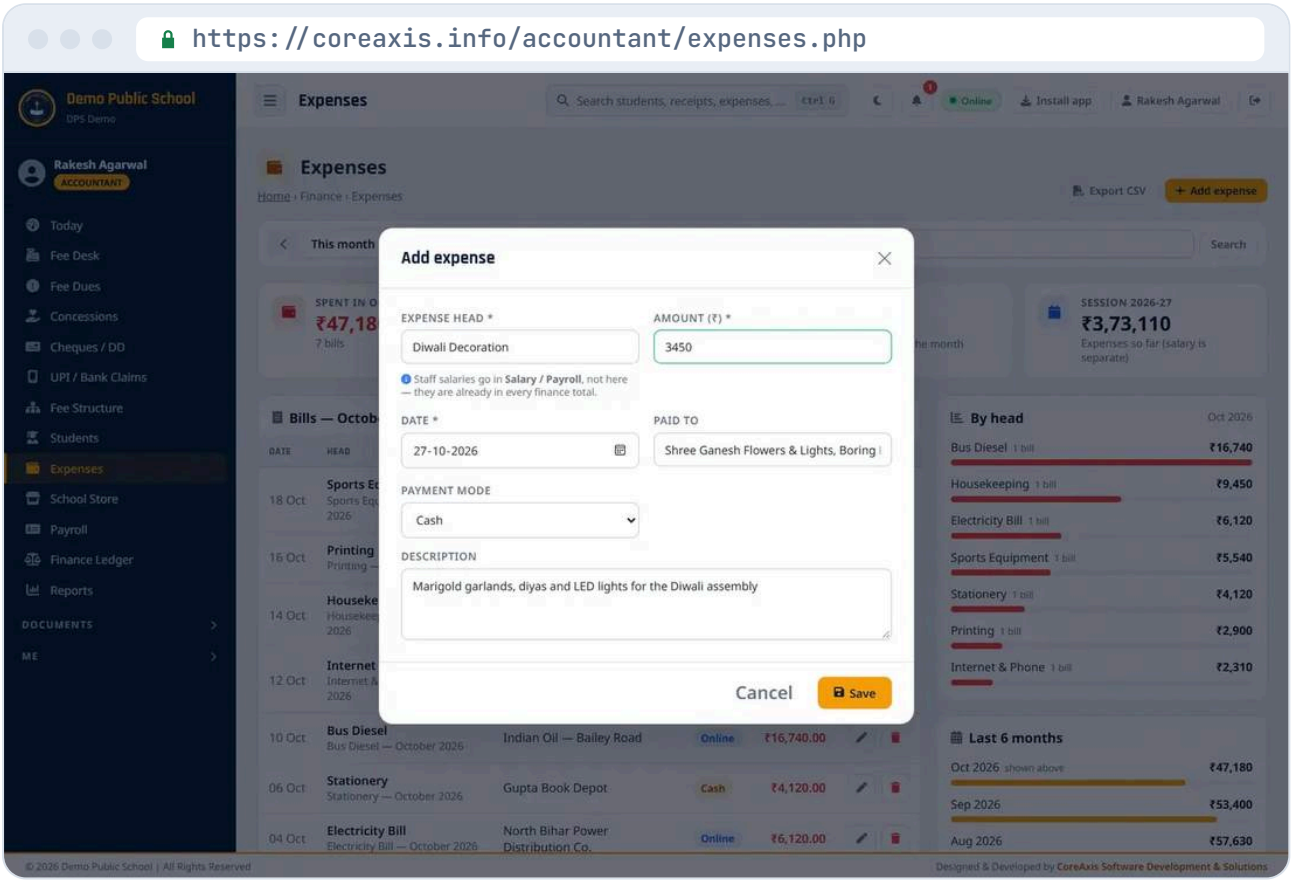
Expenses for October 2026.

2. Type the **Expense head**, for example `Diwali Decoration`. Existing heads appear as suggestions; reuse them so the reports group correctly.

3. Type **Amount (₹)** `3450` and set **Date** to 27-10-2026.

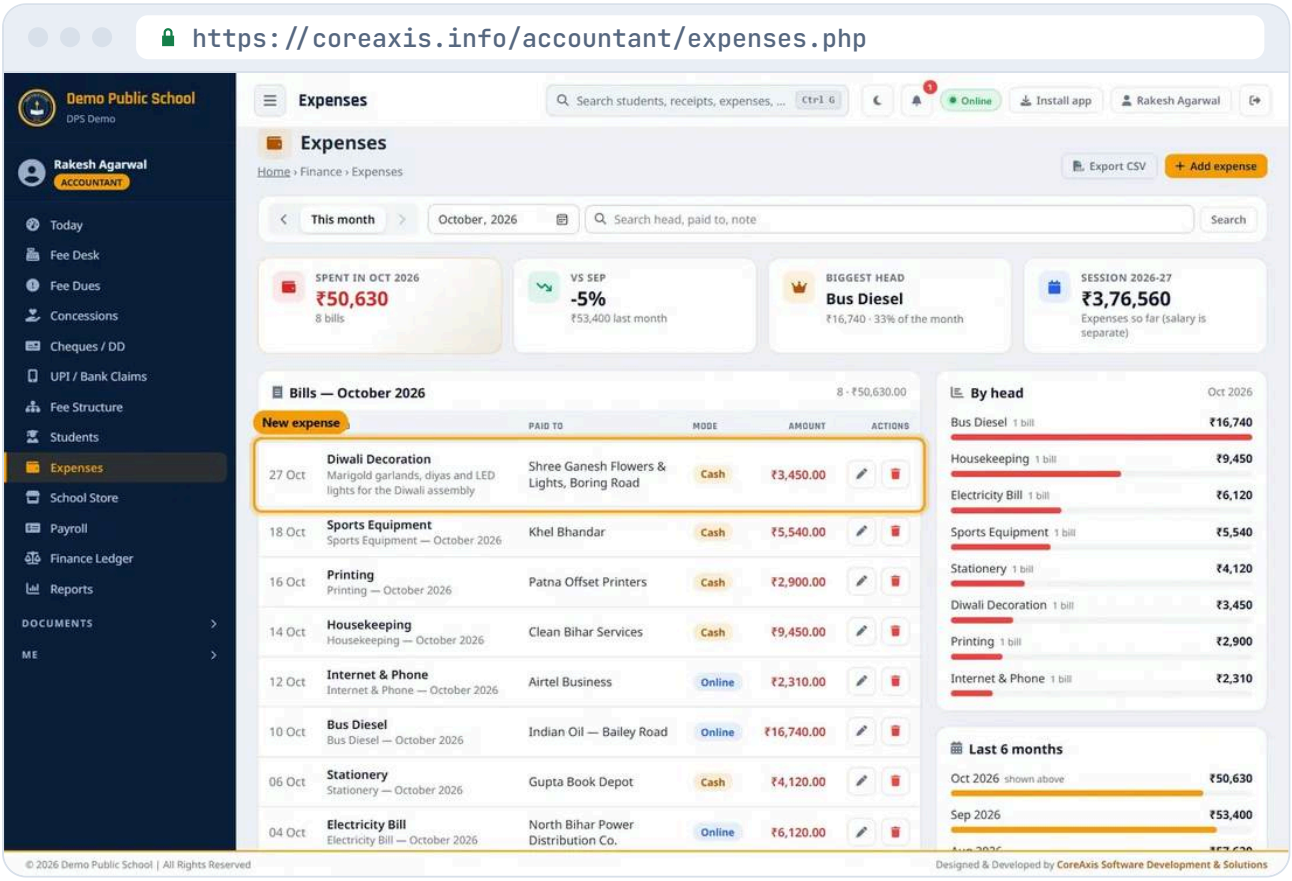
4. Type **Paid to** `Shree Ganesh Flowers & Lights, Boring Road` and choose **Payment mode Cash**.

5. Write a **Description**, for example `Marigold garlands, diyas and LED lights for the Diwali assembly`.



The filled Add expense form.

6 Click **Save**, then **Confirm**. The bill appears at the top of the list.



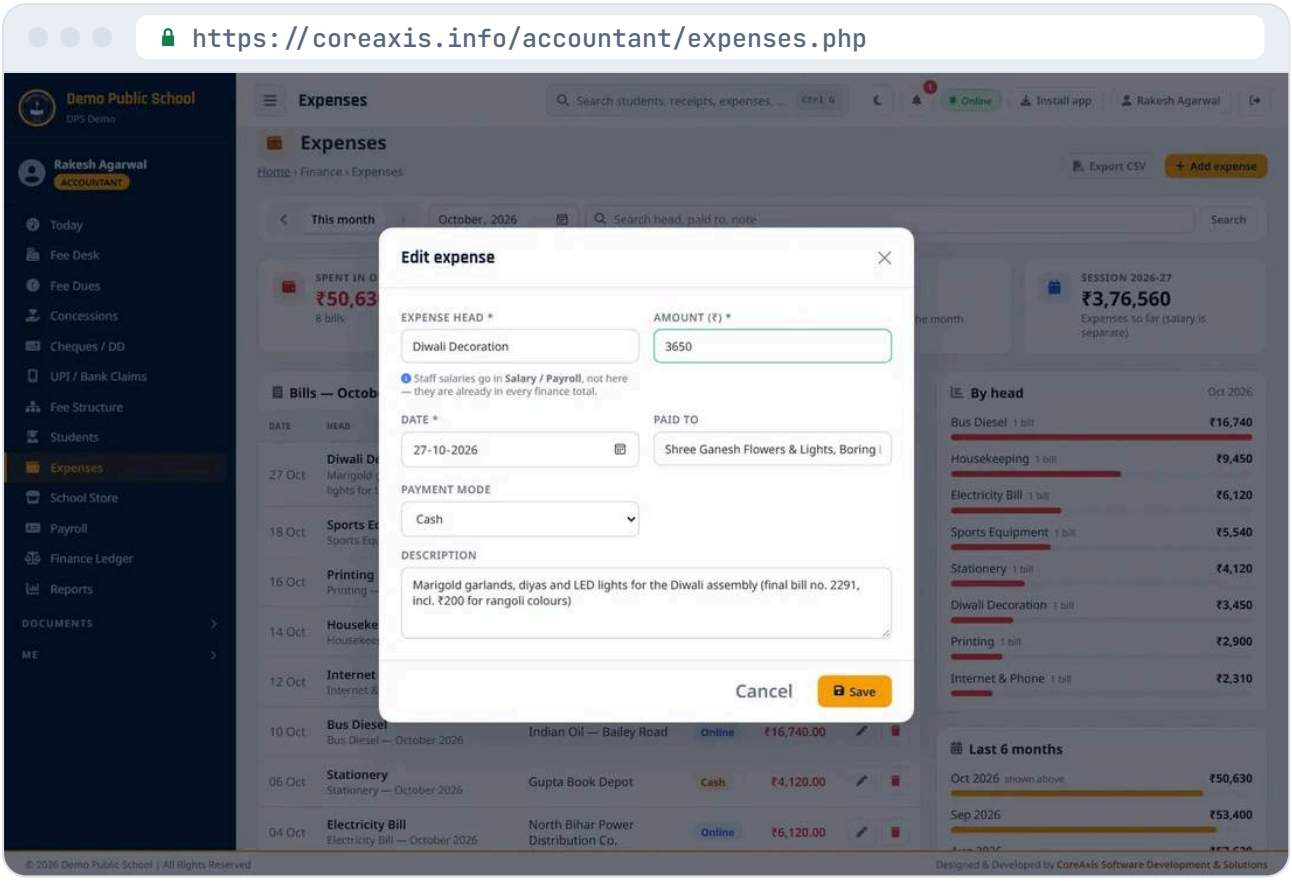
The new expense in October's bills.

TIP Salaries go in Payroll, not here. They are already in every finance total.

Edit an expense (example: final bill ₹3,650)

1 Click the pencil icon on the Diwali Decoration row, then **Edit** in the popup.

2 Change **Amount (₹)** to `3650` and add the bill number to the **Description**.

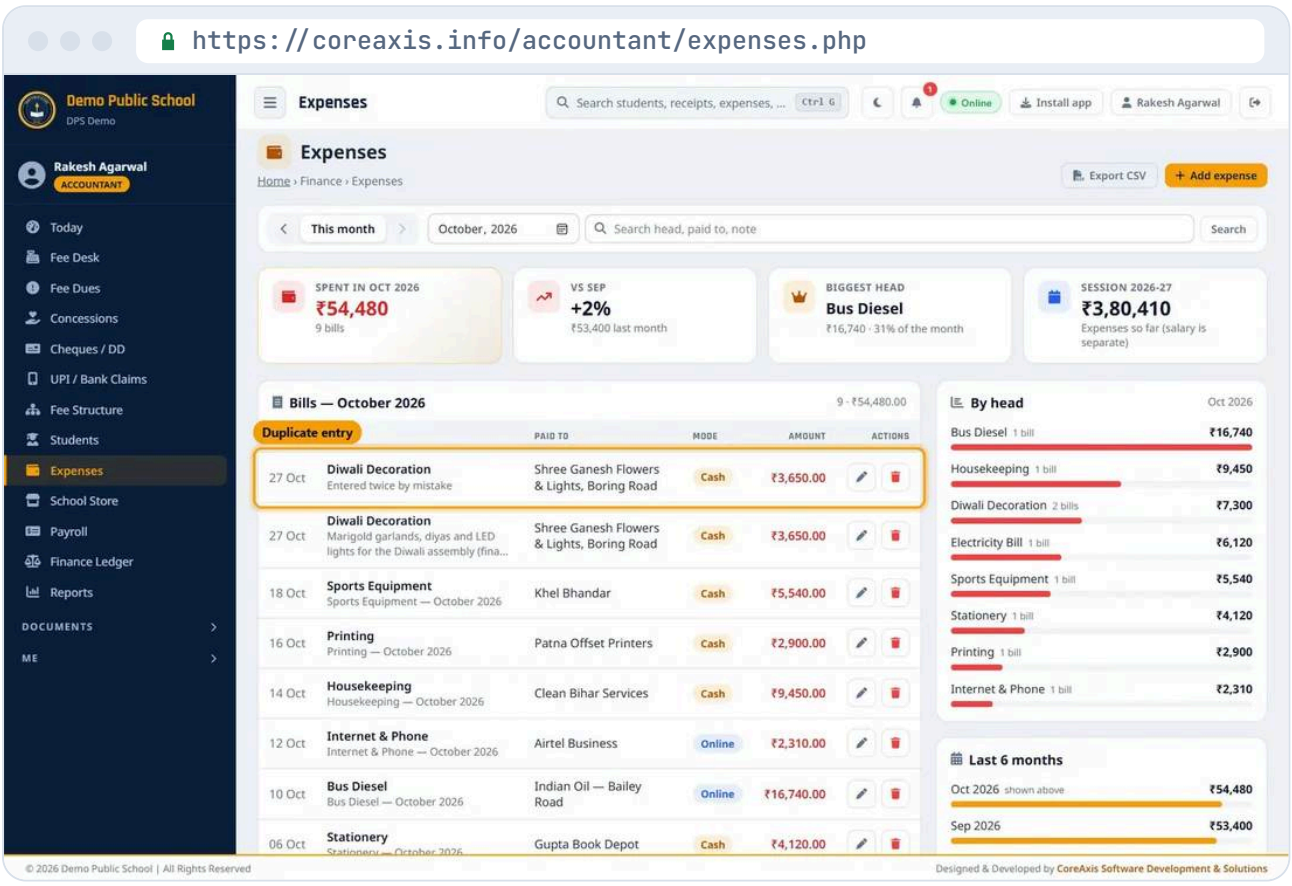


Edit expense with the corrected amount.

3 Click **Save**, then **Confirm**.

Delete a duplicate expense

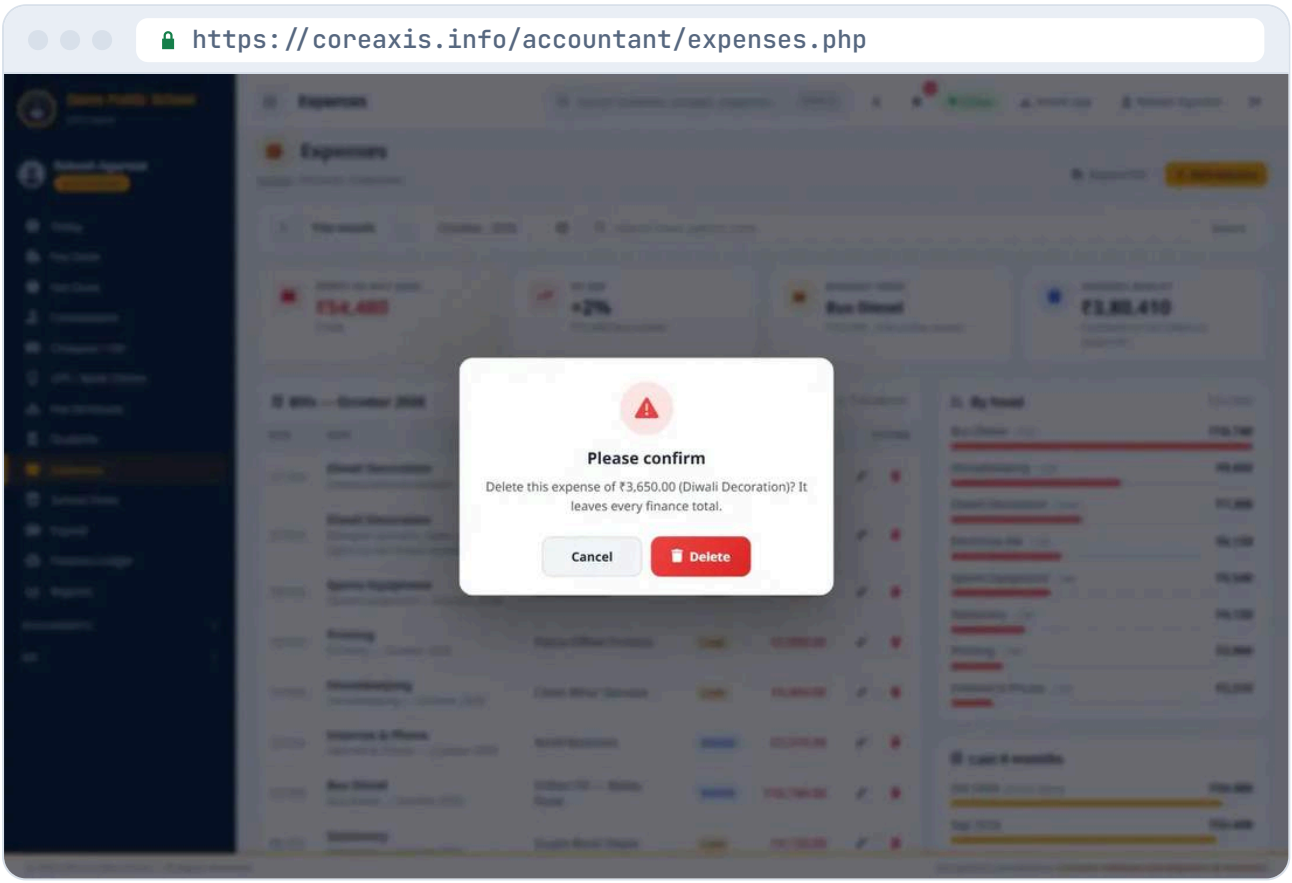
1 Find the wrong row, for example the same Diwali bill entered twice by mistake.



The duplicate entry.

2 Click the red bin icon on that row.

3 Read the popup "Delete this expense of ₹3,650.00 (Diwali Decoration)? It leaves every finance total." and click **Delete**.



First confirmation.

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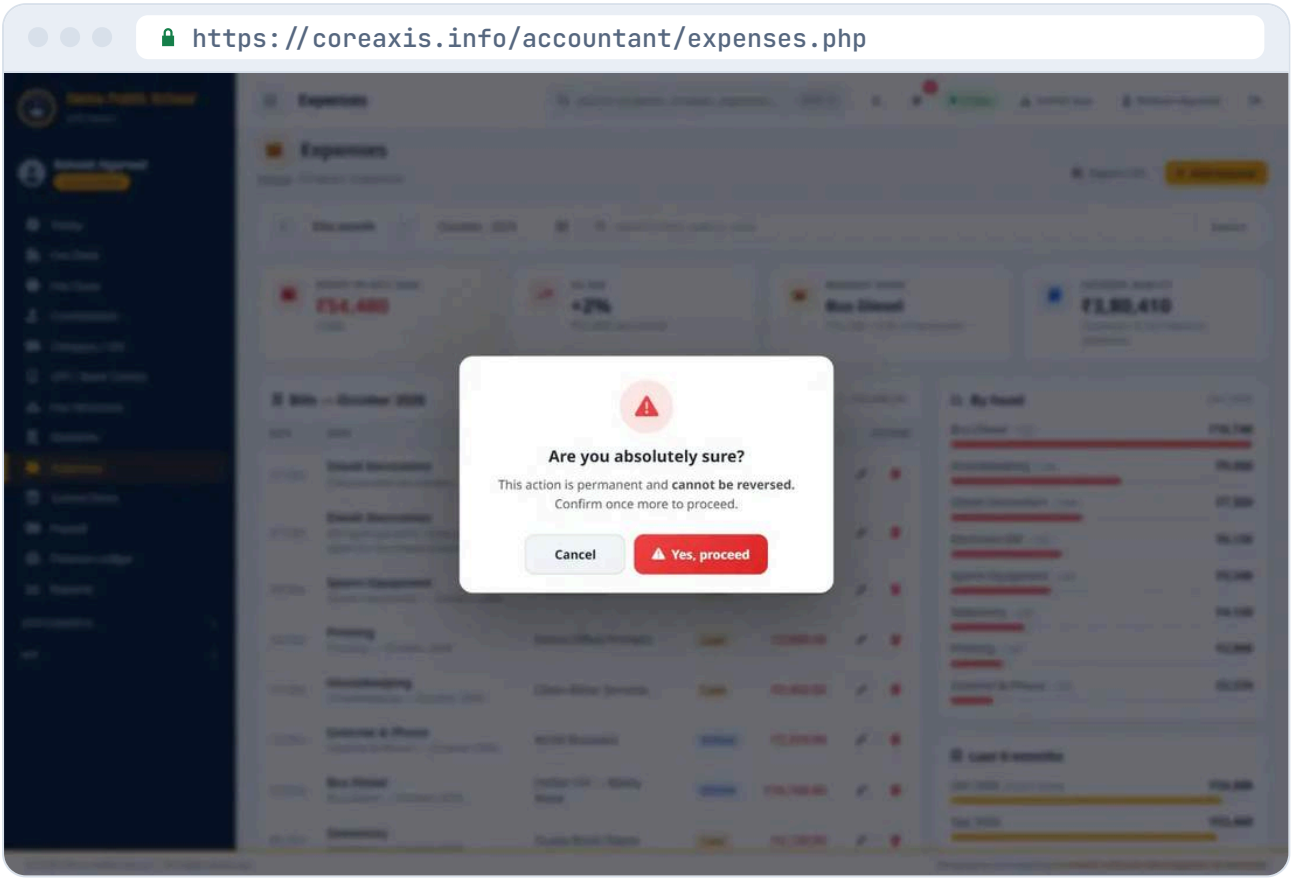
4 Click **Yes, proceed** in the second popup.



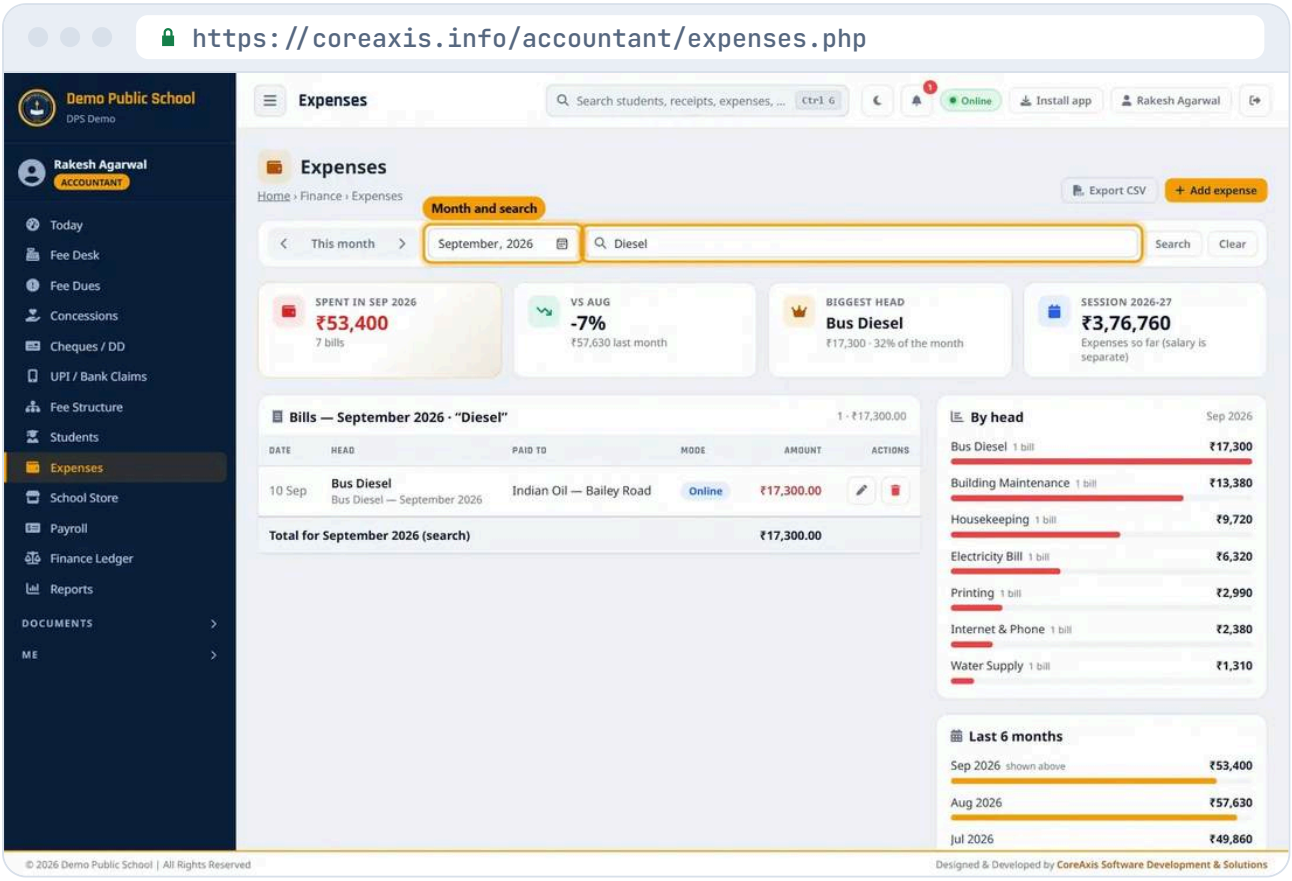
Deleting asks twice.

IMPORTANT A deleted expense cannot be brought back. Check you are deleting the duplicate and not the real bill.

Filter and export (example: September 2026 diesel bills)

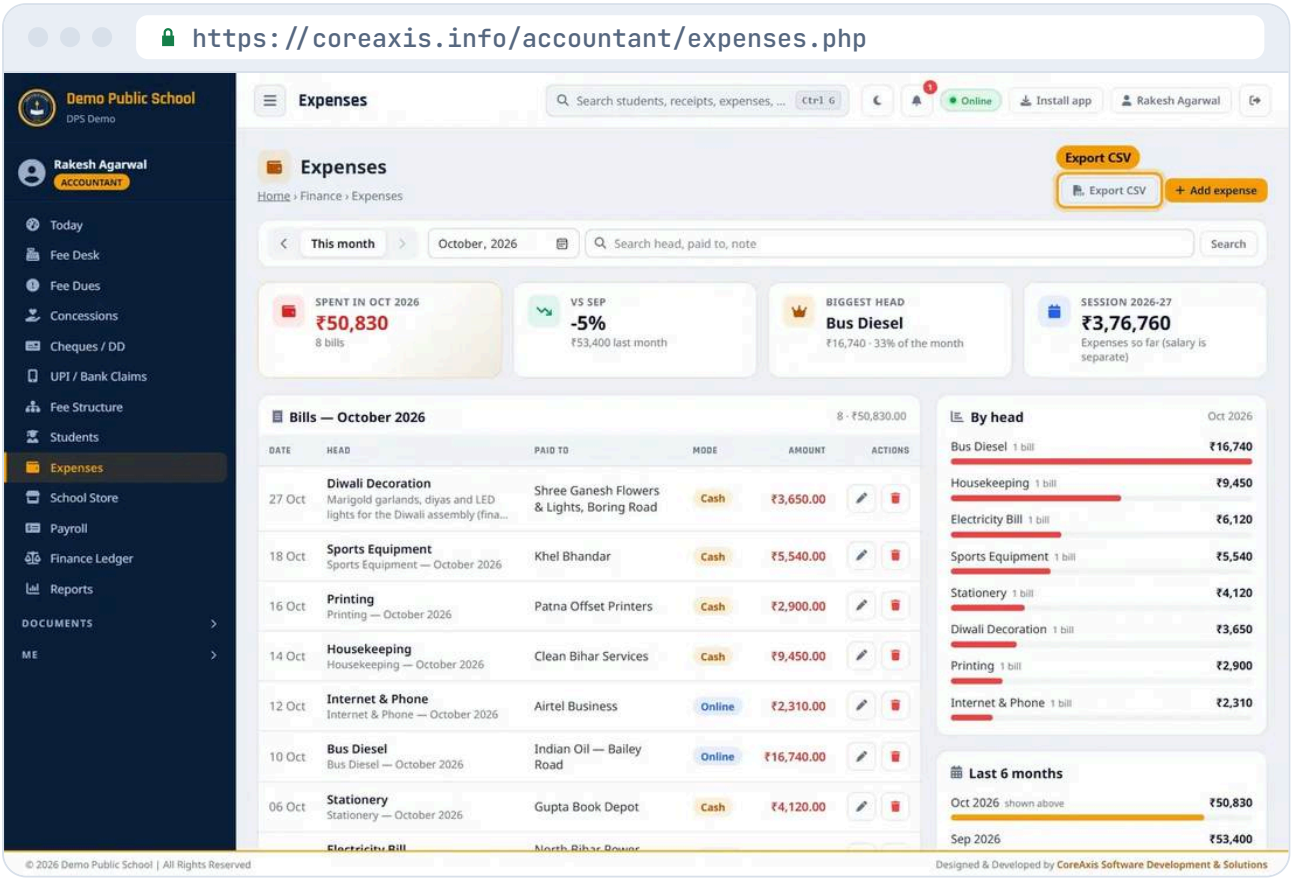
1 Pick the month with the month picker or the arrows, for example September 2026.

2 Type `Diesel` in the search box and click **Search**.



Month and search filter.

3 Click **Export CSV** to download the bills of the month shown.



Export CSV downloads the month's bills.

Questions

Can the accountant delete an expense?

Yes, accountants can add, edit and delete expenses. Every delete asks twice.

Where do expenses show in the accounts?

Cash expenses in the Cash Book, Online and Cheque in the Bank Book, and all of them in Ledger › Expenditure and Income & Expenditure.

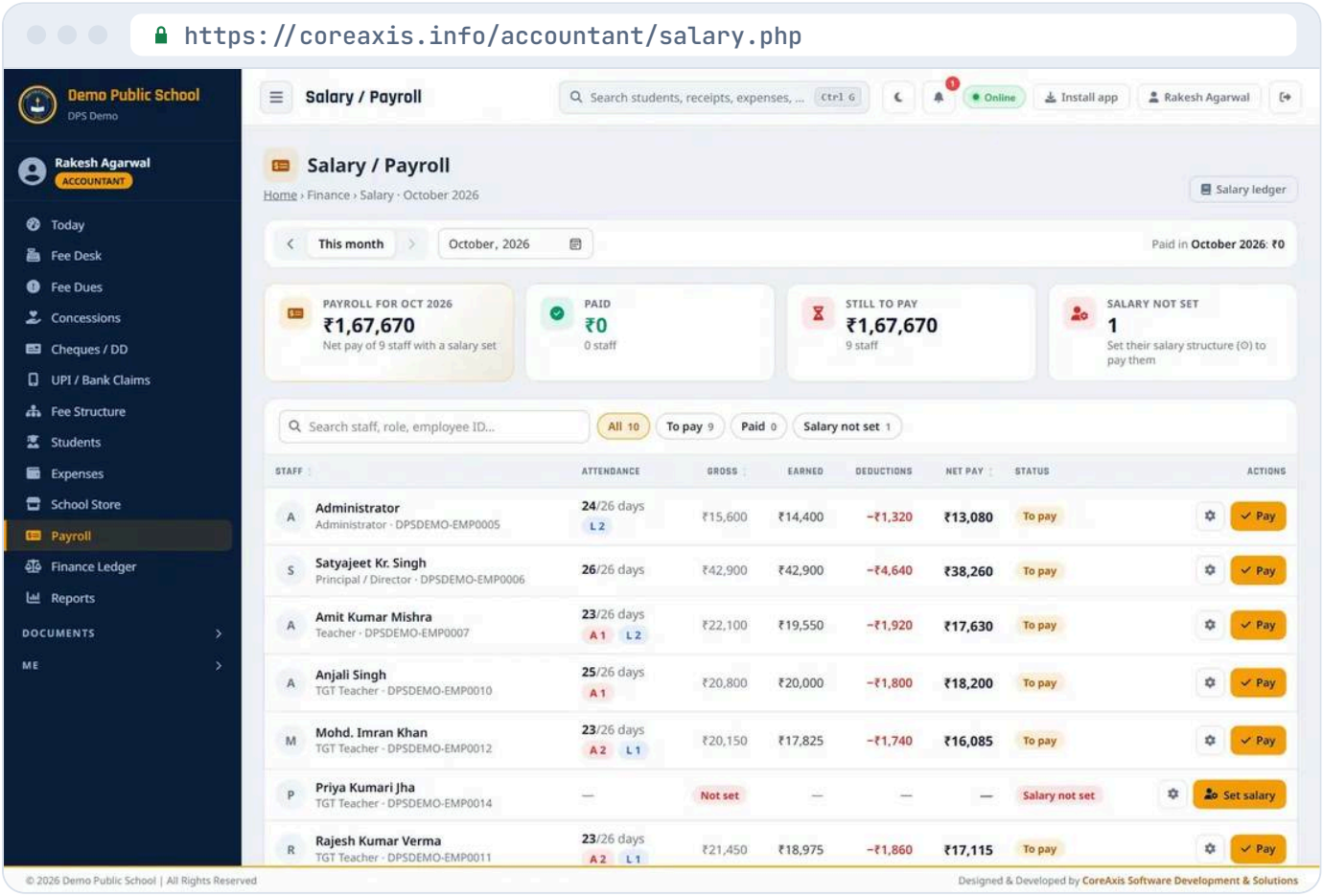
FINANCE · CHAPTER 32

Salary / Payroll

Admin | Principal | Accountant | All staff (My Payslips)

MENU Finance › Salary / Payroll (Accountant: Payroll)

Payroll works month by month. Each staff member has a salary structure (earnings and deductions). For the chosen month the app reads staff attendance, works out the earned salary and net pay, and the office marks it paid. The payment goes into the salary account and the Cash or Bank Book, and the staff member can download the payslip from My Payslips.



Salary / Payroll — Demo Public School

Screen at a glance

Month	The month being paid (October 2026). Use the month picker to open another month.

Payroll for (month)	Net pay of all staff with a salary set.
Paid	Amount paid so far and number of staff.
Still to pay	Amount and number of staff not yet paid.
Salary not set	Staff without a salary structure.
Chips	All, To pay, Paid.
Columns	Staff (designation, employee ID), Attendance (present / working days, A = absent, L = leave), Gross, Earned, Deductions, Net pay, Status, Actions.
Gear icon	Opens the salary structure.
Pay / Set salary	Pays the month, or sets the structure for a new staff member.
Printer icon	Payslip (after the salary is paid).
Salary ledger	Opens Finance Ledger › Salary account.

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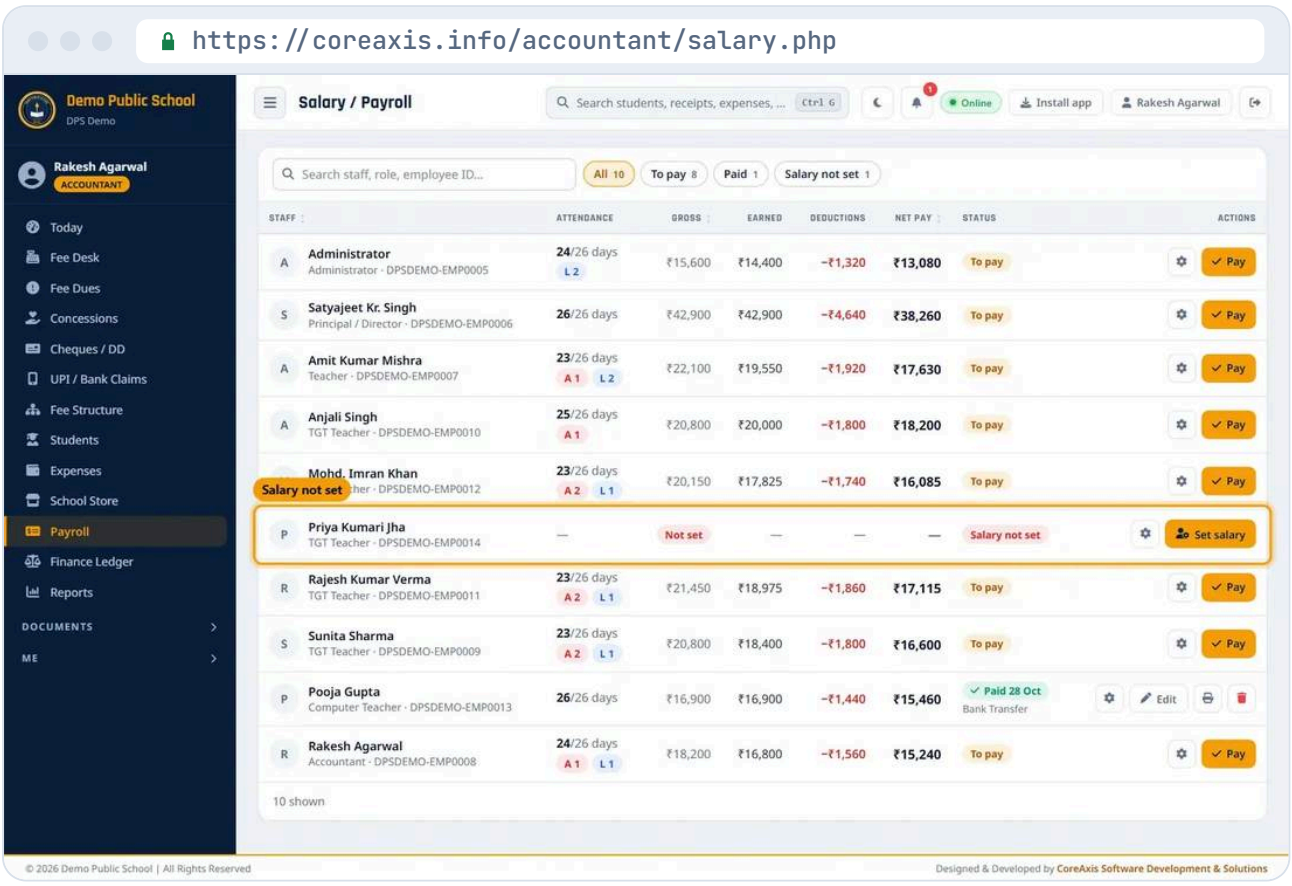
Set the salary of a new teacher (example: Priya Kumari Jha, TGT)

1. Open **Payroll**. A new staff member shows **Salary not set**.



Salary not set for the new teacher.

2. Click **Set salary**, then **Set salary** in the popup.

3. Fill the earnings per month: **Basic salary** 14,000, **HRA** 2,800, **DA** 1,400, **TA / conveyance** 800, **Medical** 500.

4. Fill the deductions: **PF** 1,680 (ESI, TDS, Other deductions 0).

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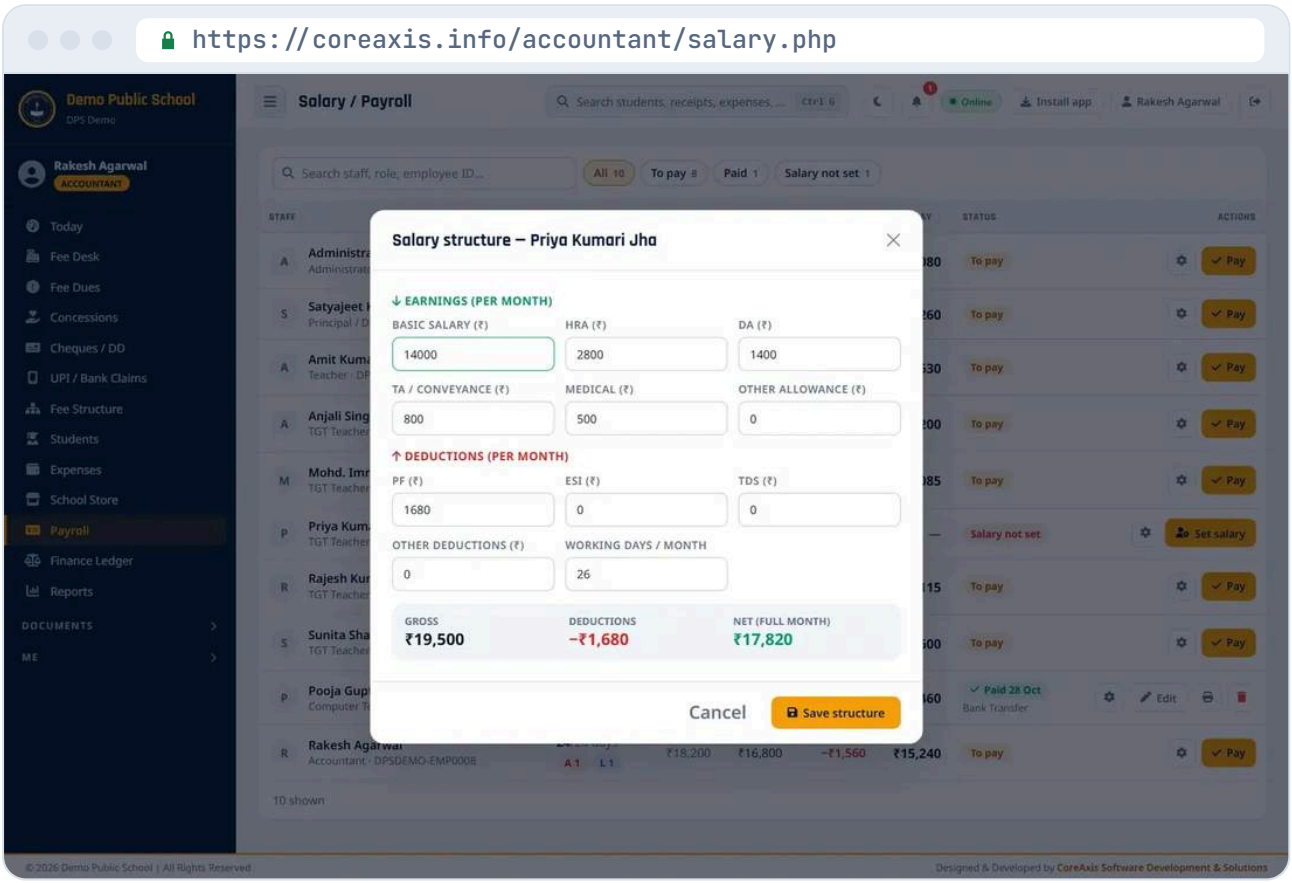
5 Keep **Working days / month** at 26. The box at the bottom shows Gross ₹19,500, Deductions −₹1,680, Net (full month) ₹17,820.



Salary structure with the totals worked out.

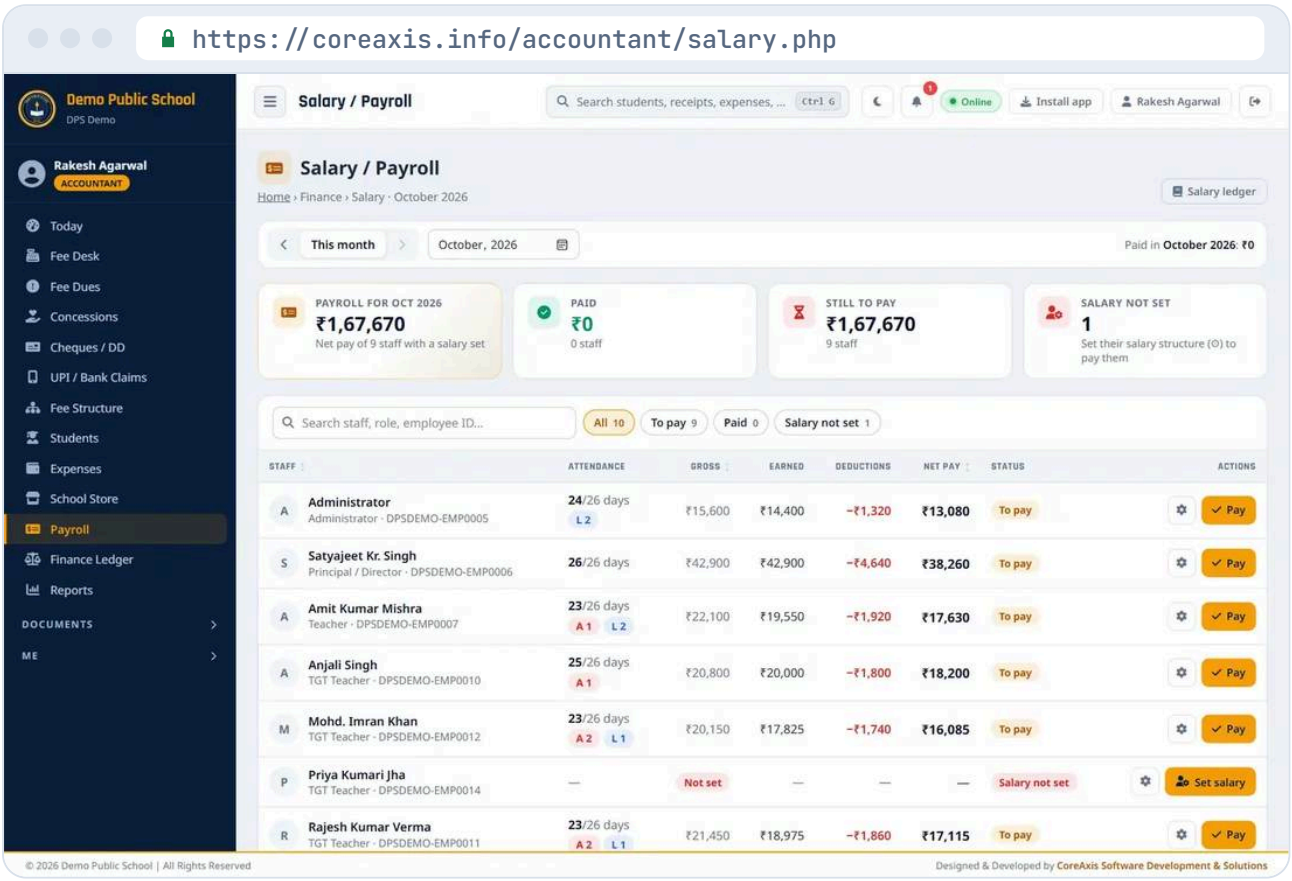
6 Click **Save structure**, then **Confirm**. It is used for every month paid from now.

> **TIP** To change a structure later, click the gear icon on the staff row. Only Admin / Principal can remove a structure.

Pay the month's salary (example: Pooja

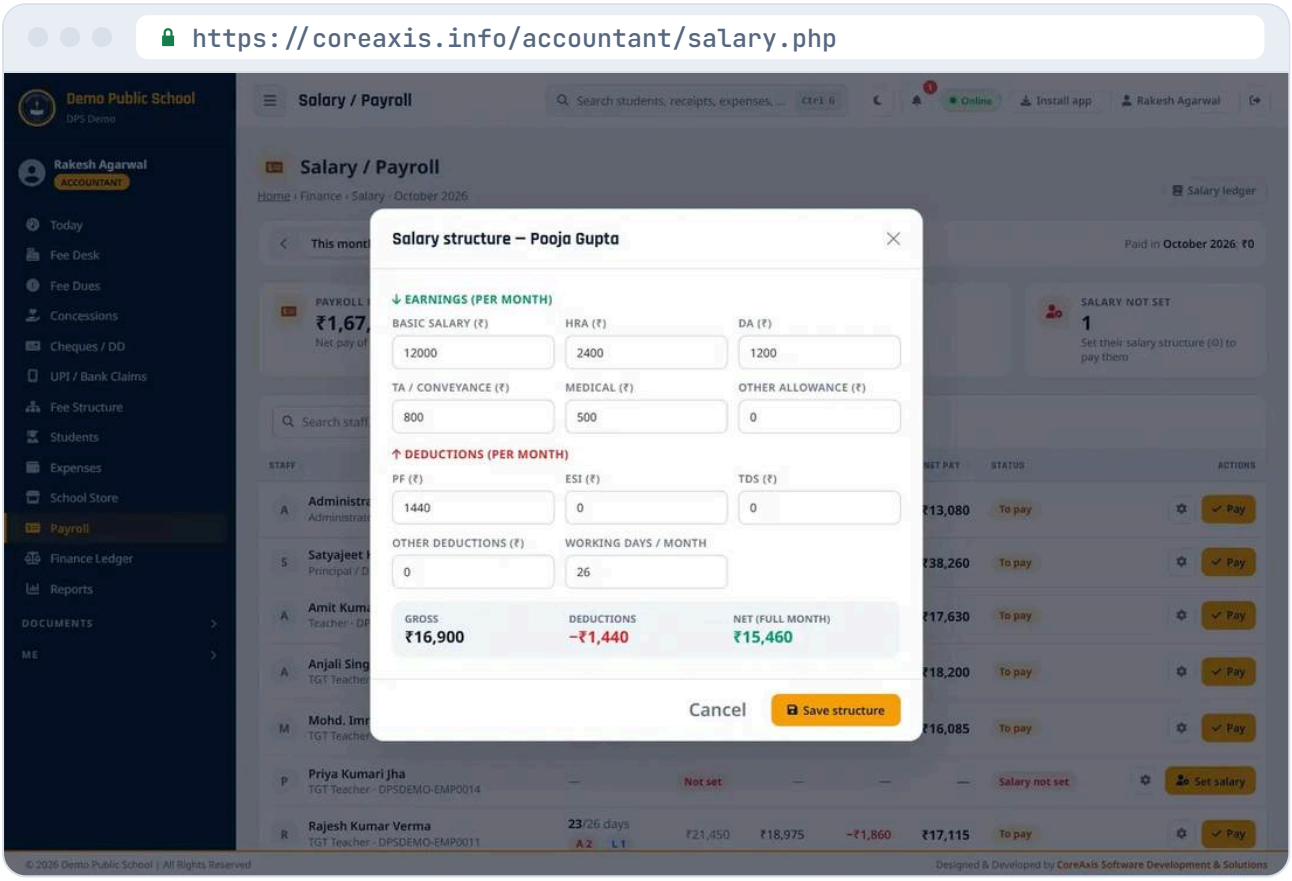
Gupta, Computer Teacher, October 2026)

1 Open **Payroll** for **October 2026**. Every row shows the attendance and the net pay worked out from it.



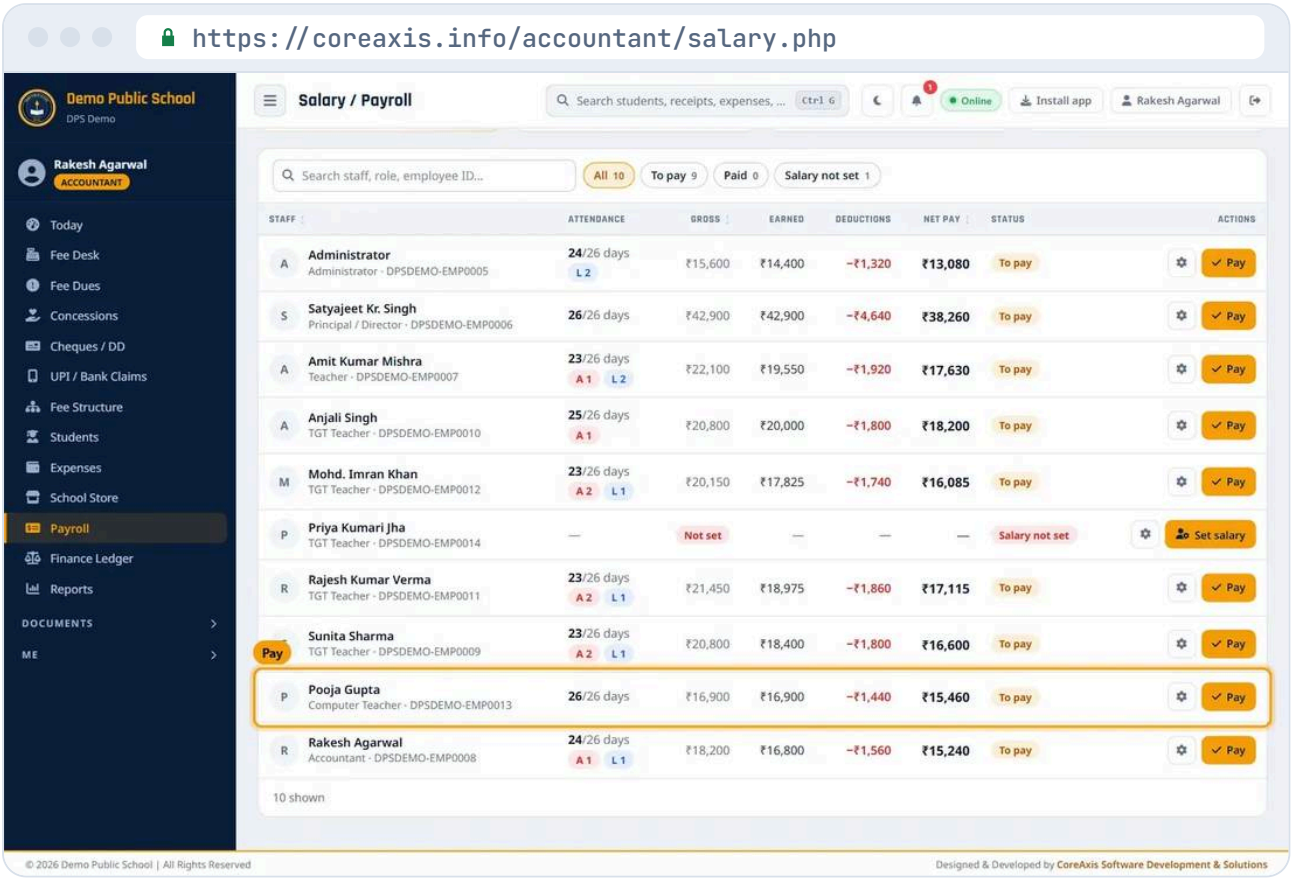
October payroll: 9 staff to pay.

2 Click the gear icon to check Pooja Gupta's structure if needed.



Salary structure of Pooja Gupta: gross ₹16,900, net ₹15,460.

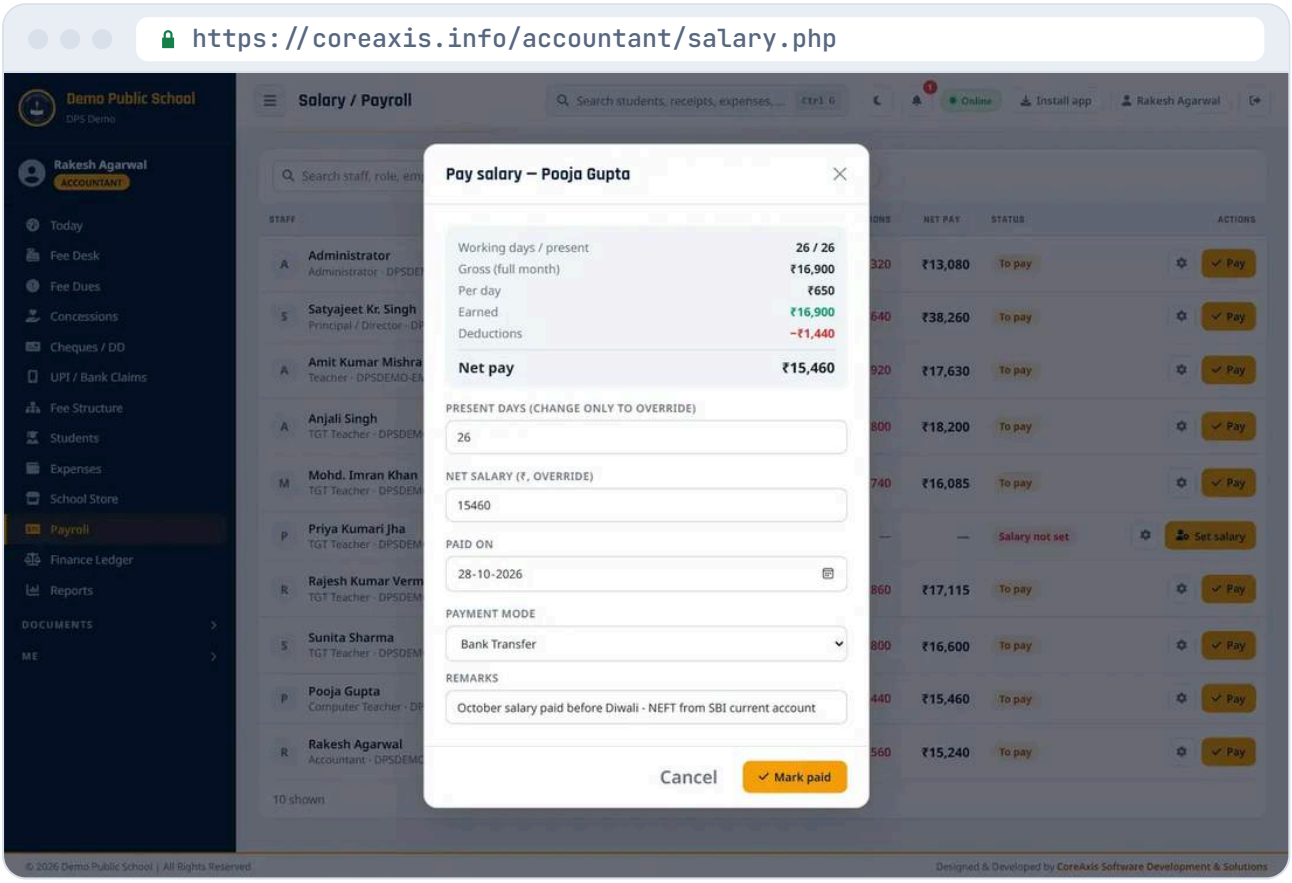
3 Click **Pay** on Pooja Gupta's row.



Pay button on the row.

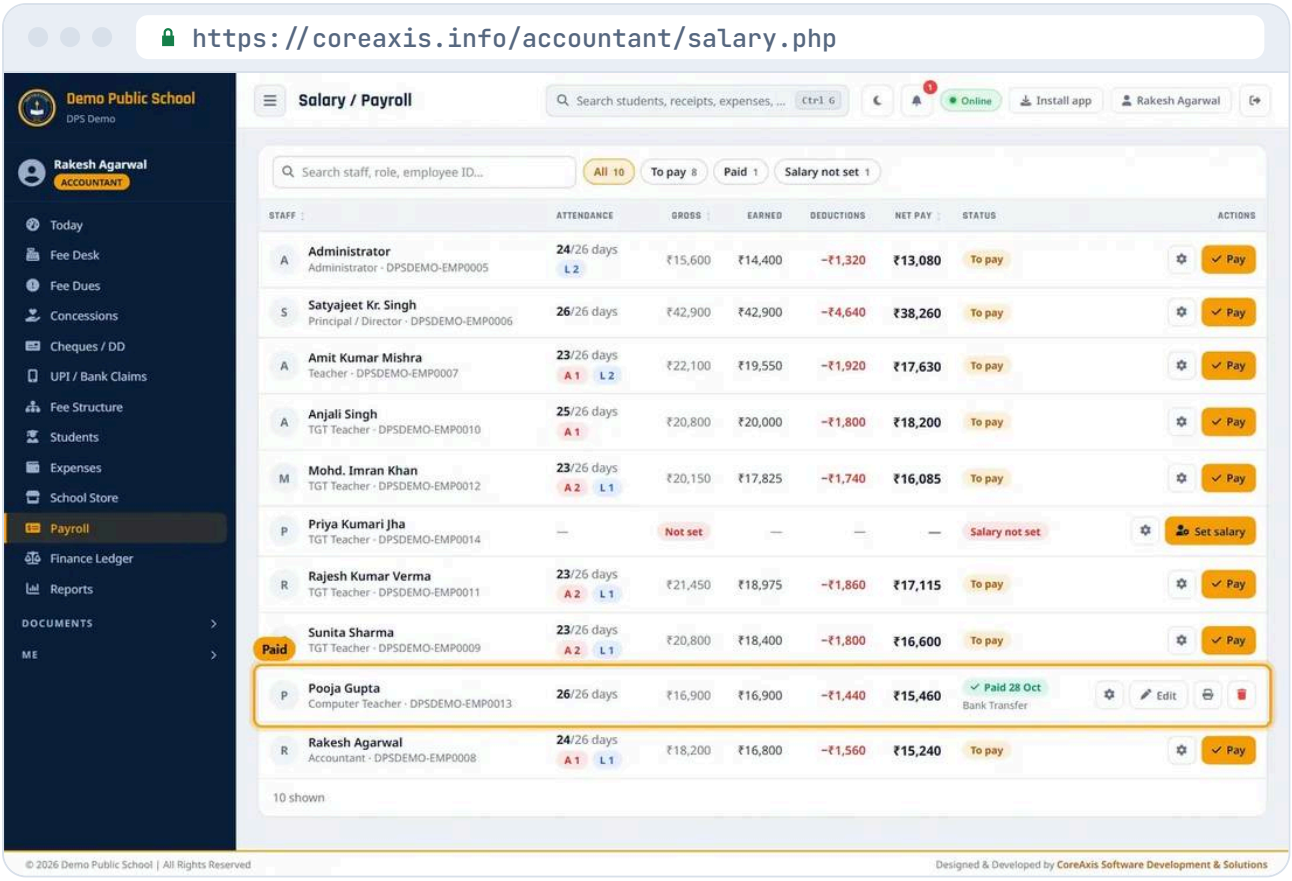
4 Check the summary: 26 / 26 days present, gross ₹16,900, deductions −₹1,440, **Net pay ₹15,460**. Change **Present days** or **Net salary** only to override.

5 Set **Paid on** (28-10-2026), **Payment mode Bank Transfer**, and a **Remarks** line, for example `October salary paid before Diwali - NEFT from SBI current account`.



Pay salary window.

6 Click **Mark paid**, then **Mark paid** in the popup. The row shows **Paid**.



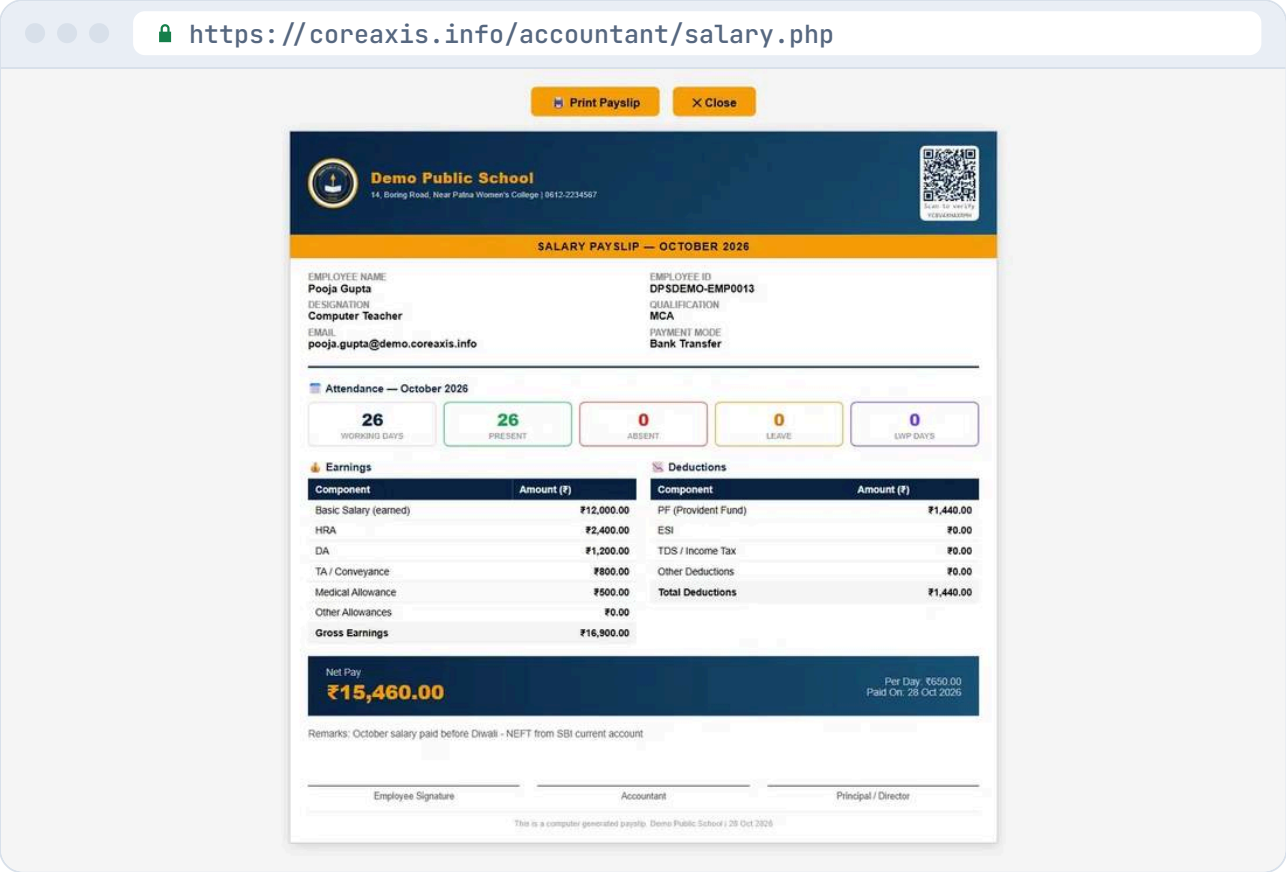
Pooja Gupta marked paid.

TIP Mark staff attendance for the month first (Staff › Staff Attendance). Unmarked working days are counted as present, and the Pay window warns you about them.

TIP Leave without pay is deducted at the per-day rate (gross ÷ working days).

Print the payslip

1. Click the printer icon on a paid row. The payslip opens in a new tab with attendance, earnings, deductions, net pay and a verification QR code.

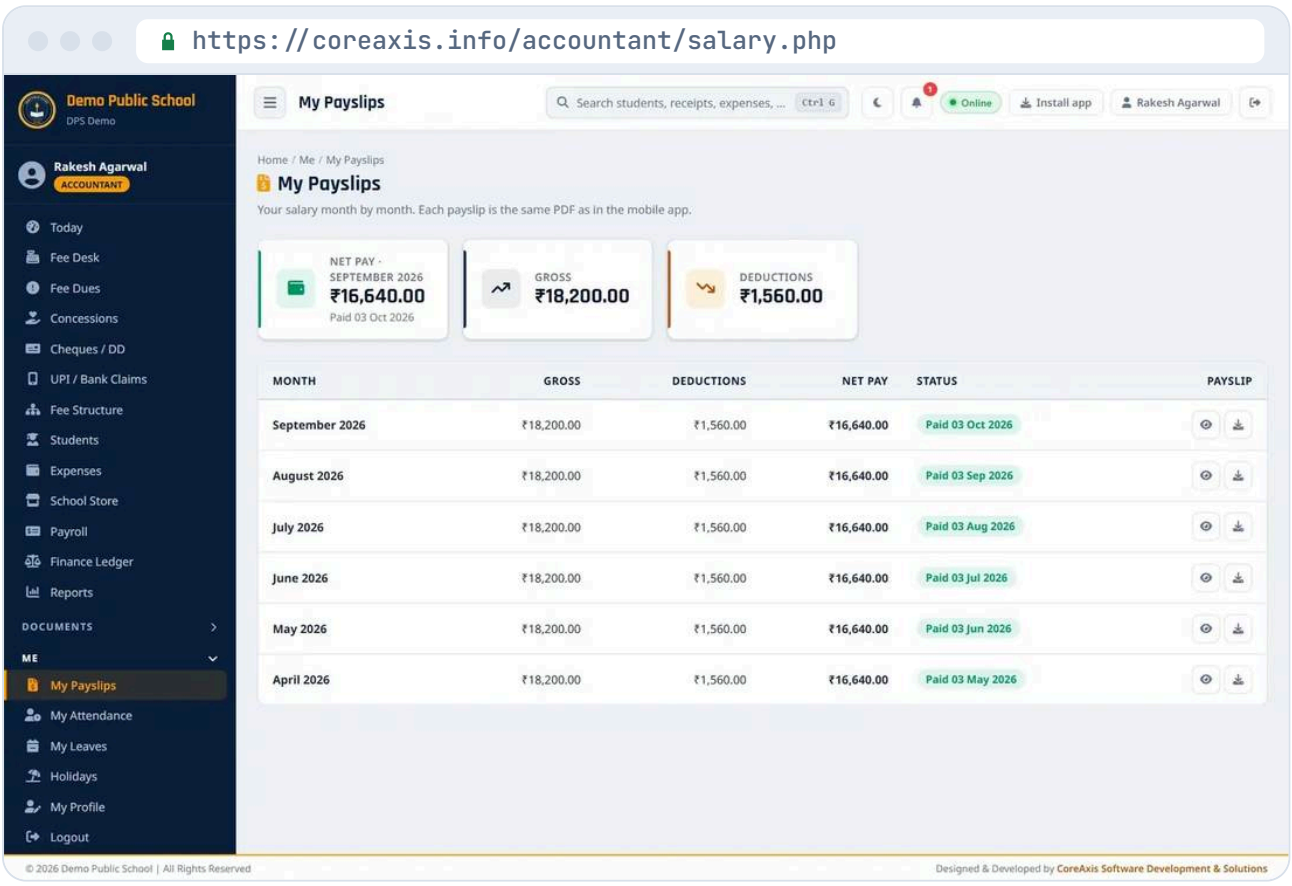


Payslip of Pooja Gupta for October 2026.

2. Click **Print Payslip**. Choose **Save as PDF** to keep a file.

My Payslips (every staff member)

1. Any staff member opens **Me › My Payslips**.



My Payslips of the accountant, newest month first.

2. The top cards show the latest net pay, gross and deductions.
3. Click the eye icon to view a month's payslip, or the download icon to save the PDF (the same PDF as in the mobile app).

Questions

I paid the wrong amount.

Click Pay (shown as Edit) again on that row to correct it. Admin / Principal can also delete a processed salary.

Why is the net pay lower than the structure?

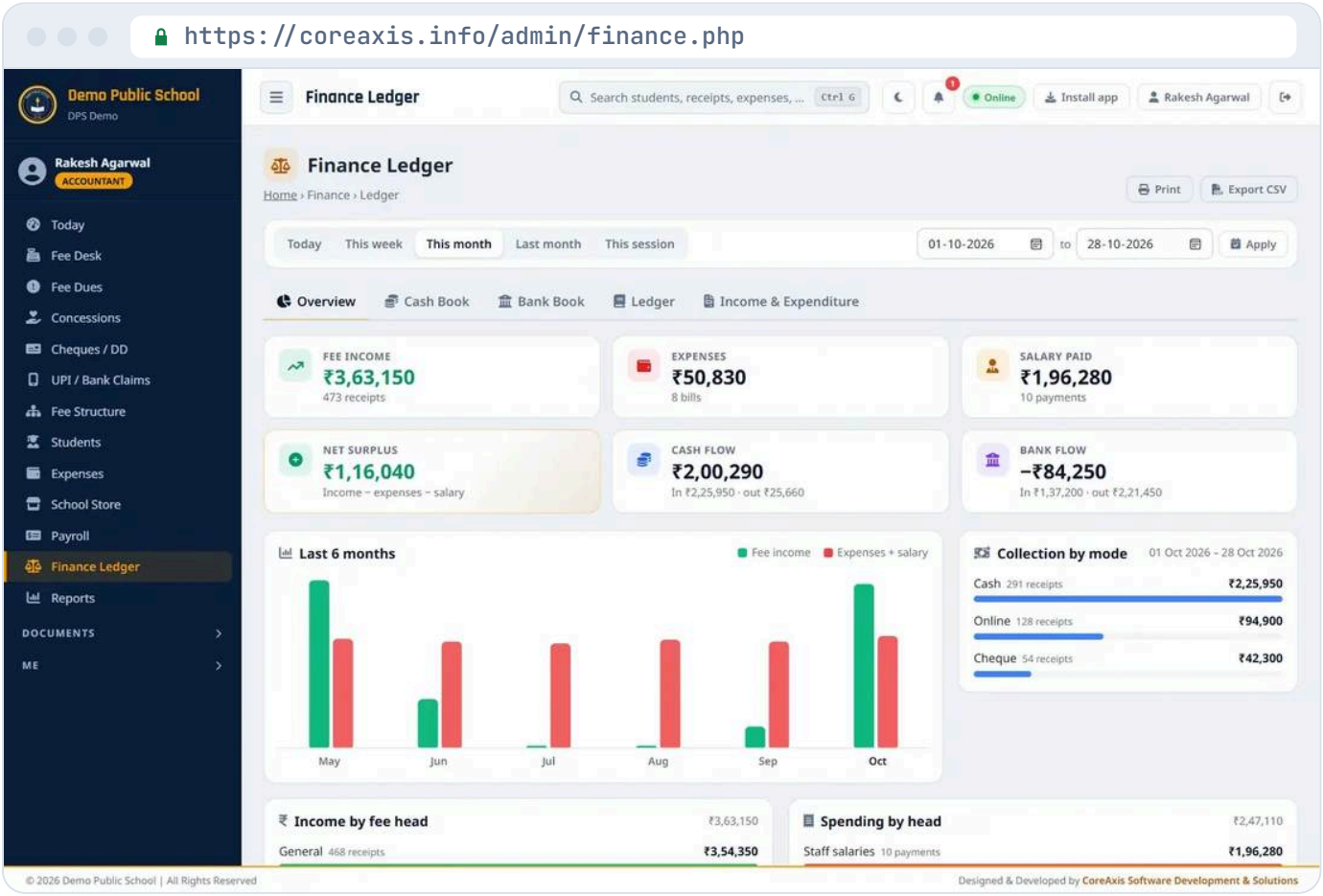
Absent or leave-without-pay days reduce the earned salary. Check the Attendance column.

FINANCE · CHAPTER 33

Finance Ledger

Admin Principal Accountant MENU Finance › Finance Ledger (Accountant: Finance Ledger)

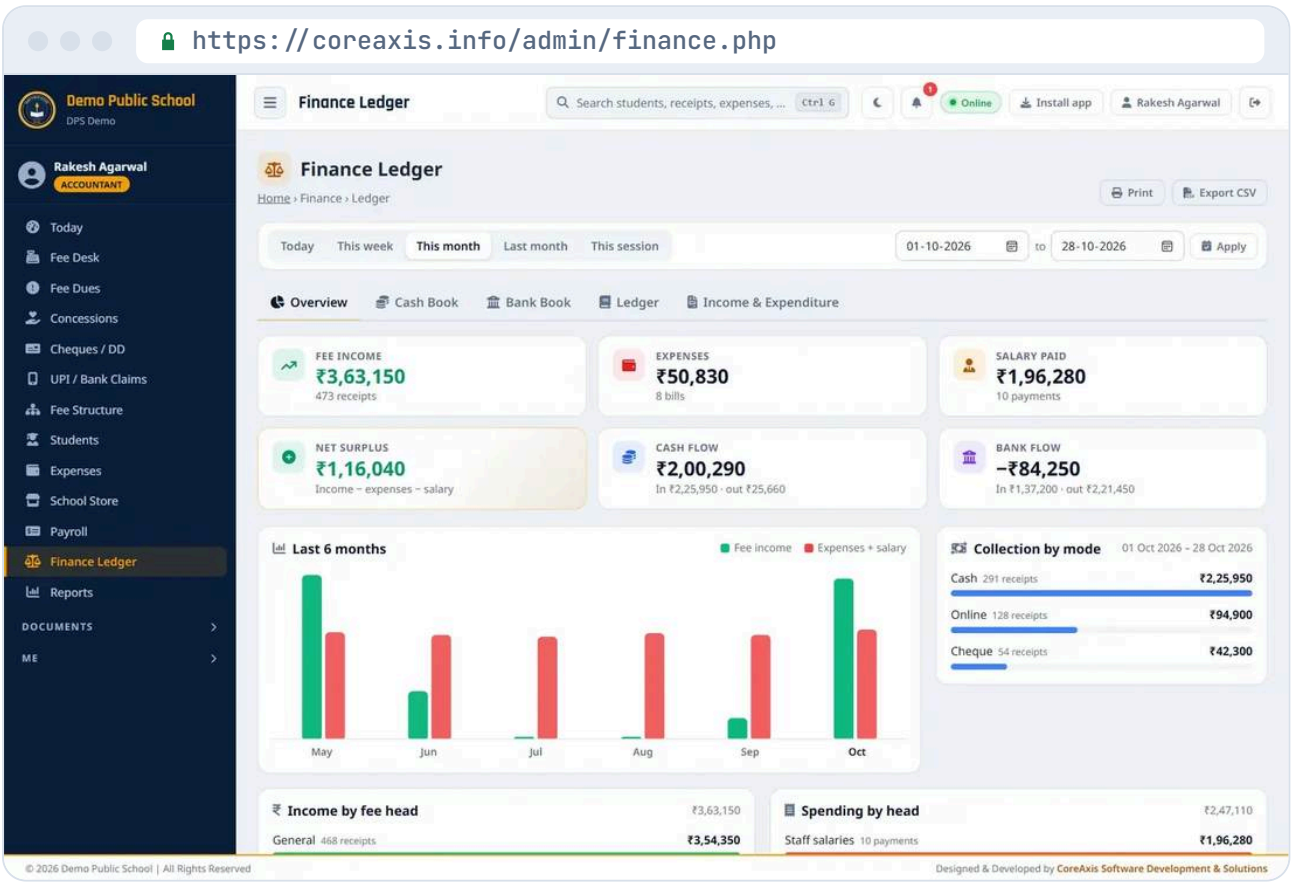
Finance Ledger puts together every fee receipt, expense and salary payment. You choose a period and read it as an overview, a Cash Book or Bank Book with running balance, a General Ledger by account, or an Income & Expenditure (profit and loss) statement. Every view can be printed or exported to CSV for the auditor.



Finance Ledger — Demo Public School

Choose the period

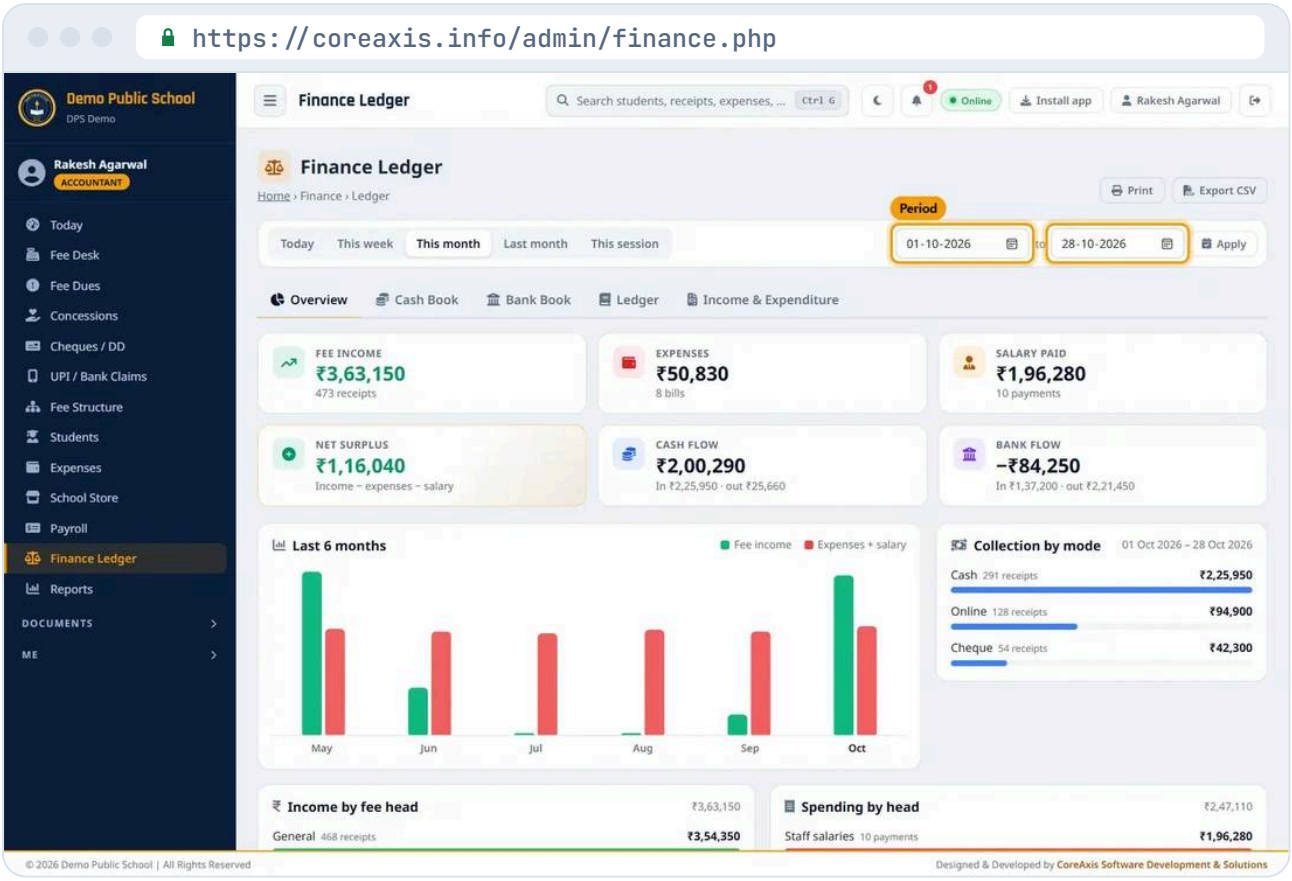
1 Open **Finance Ledger**. It opens on **This month**.



Overview of October 2026.

2 Click a quick period: **Today**, **This week**, **This month**, **Last month** or **This session**.

3 Or set your own dates in the two date boxes (from … to) and click **Apply**.



Quick periods and the custom date range.

4 The chosen period stays when you switch between the tabs.

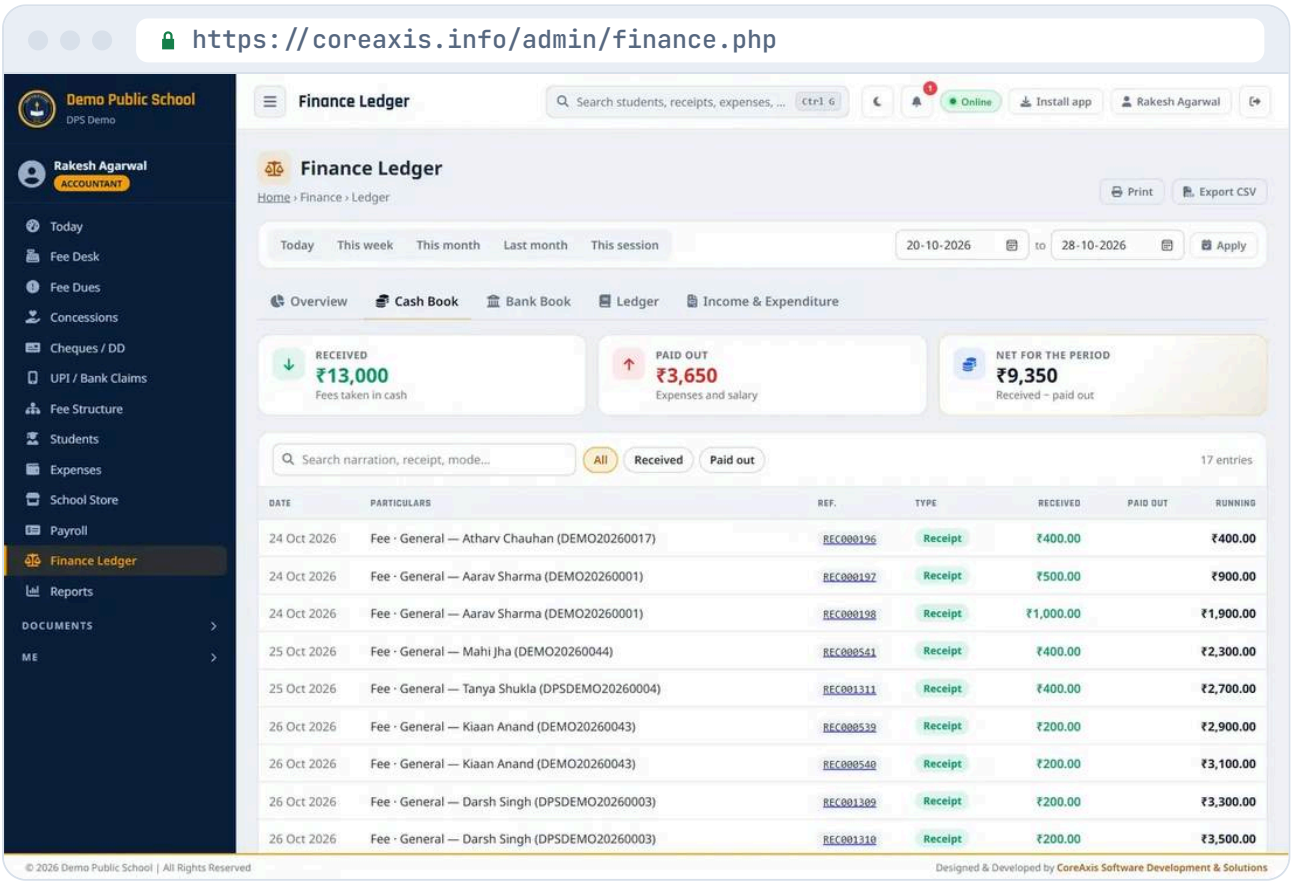
Overview tab

Fee income	Fees received in the period and receipt count, including cheques not yet cleared.
Expenses	Bills entered in Expenses.
Salary paid	Salary payments made in the period.
Net surplus	Income − expenses − salary.
Cash flow	Cash in and cash out.
Bank flow	Bank in (online, cheque, DD) and bank out.
Last 6 months	Chart of fee income against expenses + salary.

Collection by mode	Cash, Online and Cheque totals with receipt counts.
Income by fee head	Fee income split by head.
Spending by head	Salaries and each expense head.
Latest receipts	Most recent receipts; All fee income opens the full list.

Cash Book and Bank Book (example: 20–28 October 2026)

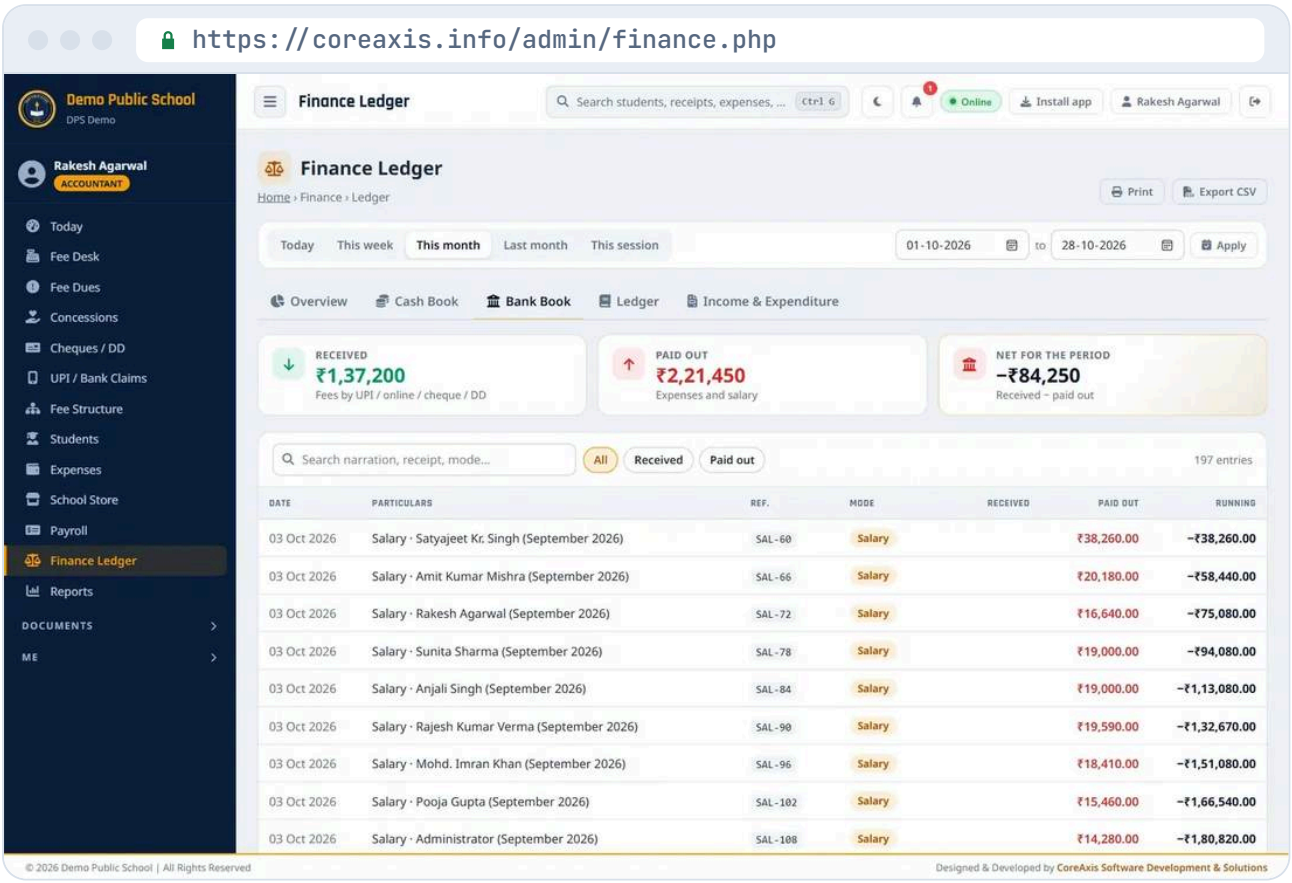
1. Set the period 20-10-2026 to 28-10-2026 and click **Apply**.
2. Click **Cash Book**. The cards show **Received** (fees in cash), **Paid out** (cash expenses and salary) and **Net for the period**.



Cash Book with a running balance.

3. Read the table: Date, Particulars, Ref. (click a receipt number to open it), Type, Received, Paid out, Running.
4. Use the search box and the **All / Received / Paid out** chips to narrow the list.

5 Click **Bank Book** for online, UPI, cheque and DD money in and bank payments out.



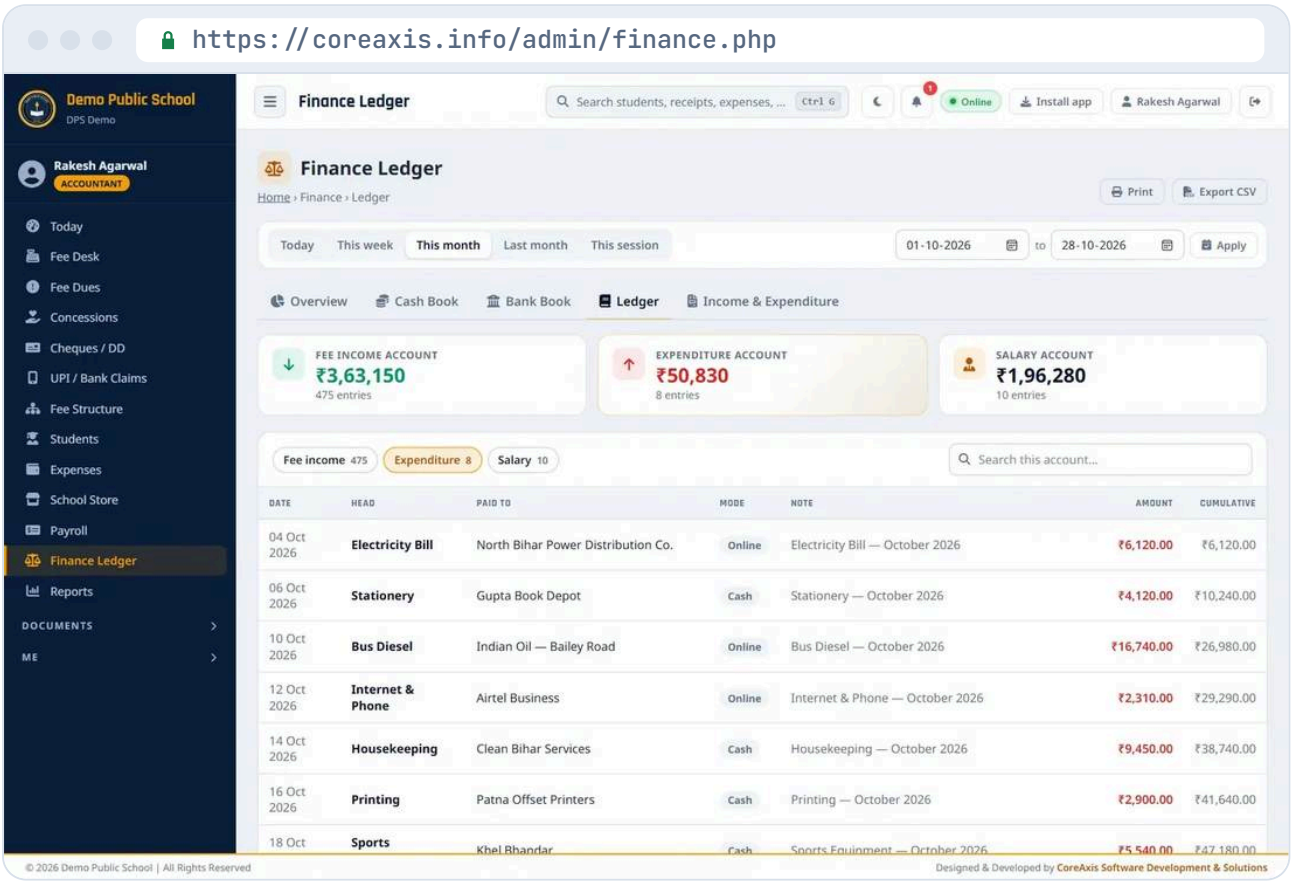
Bank Book for October.

TIP At the end of the day the Cash Book running total should match the cash in the drawer.

General Ledger

1 Click **Ledger**. Three cards show the accounts: **Fee income account**, **Expenditure account** and **Salary account**.

2 Click a card or the chips **Fee income**, **Expenditure**, **Salary** to see that account's entries with a running total.



Expenditure account for October 2026, including the Diwali Decoration bill.

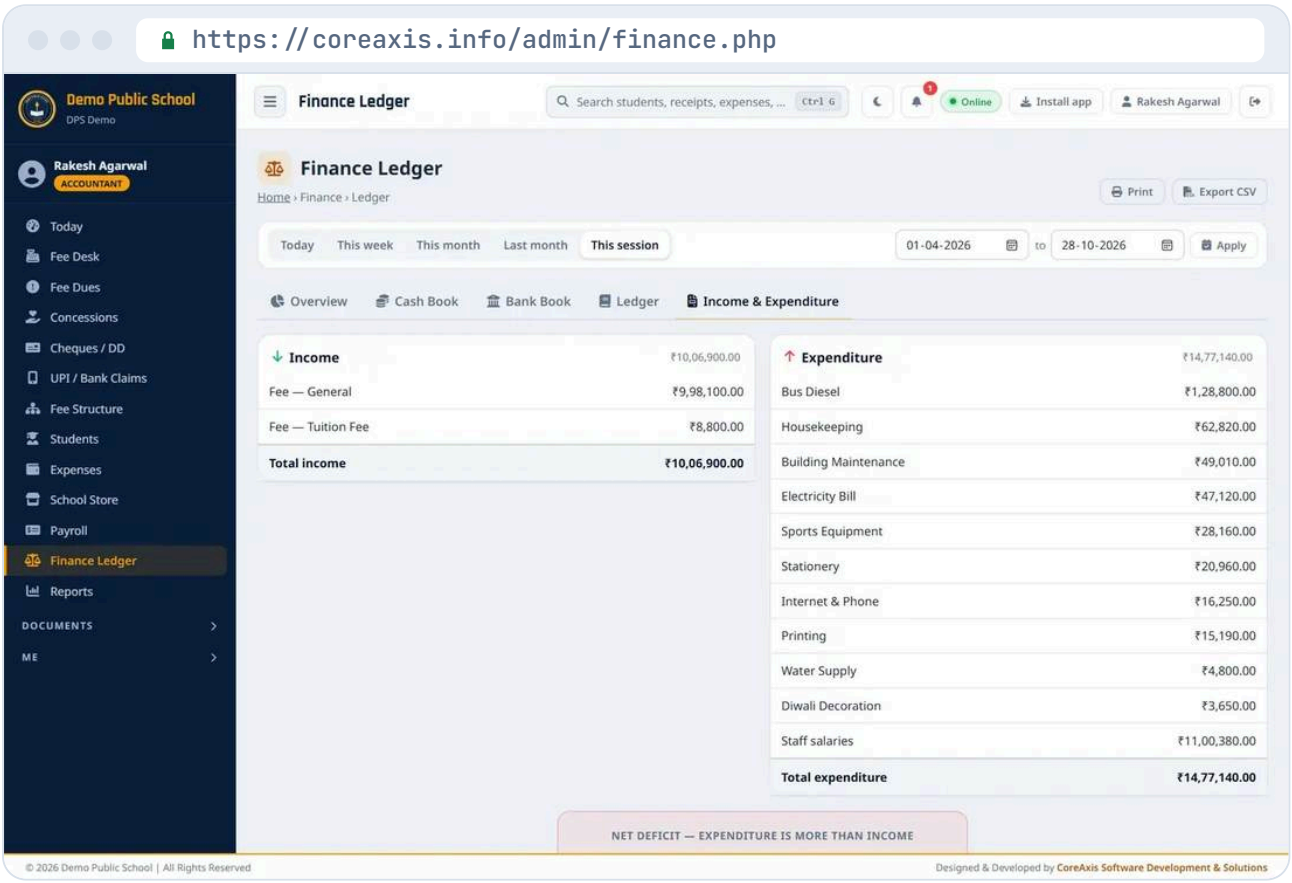
Income & Expenditure (example: this session, 1 Apr – 28 Oct 2026)

1 Click **This session**, then **Income & Expenditure**.

2 Read **Income** (fees by head) and **Expenditure** (each expense head and staff salaries) with their totals.

3 The line below says **Net surplus** or **Net deficit**. For 1 Apr – 28 Oct 2026 the demo school shows income ₹10,06,900, expenditure ₹14,77,140 and a net deficit of ₹4,70,240.

4 Read **Month by month** for income, expenses, salary, total outgo and net of each month.

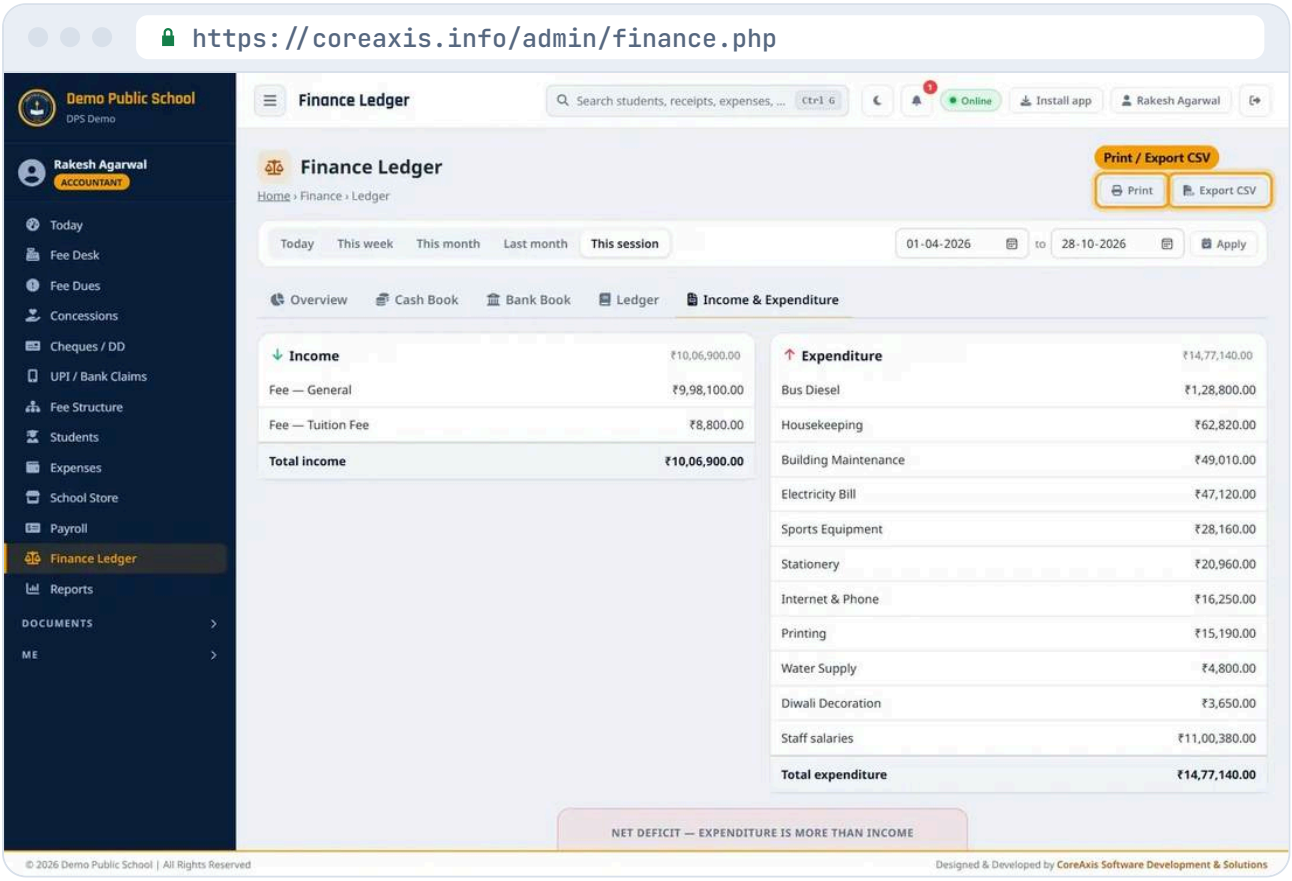


Income & Expenditure statement with the month-by-month table.

Print or export

1 Open the tab and period you need.

2 Click **Print** for a paper copy or a PDF (choose Save as PDF).



Print and Export CSV at the top right.

3 Click **Export CSV** to download the entries of the period for Excel or your CA.

Questions

Why is fee income higher than the money in the bank?

Cheque receipts count as income when they are made, even before the bank clears them. The overview card says how much of it is in cheques not yet cleared.

Can I edit an entry here?

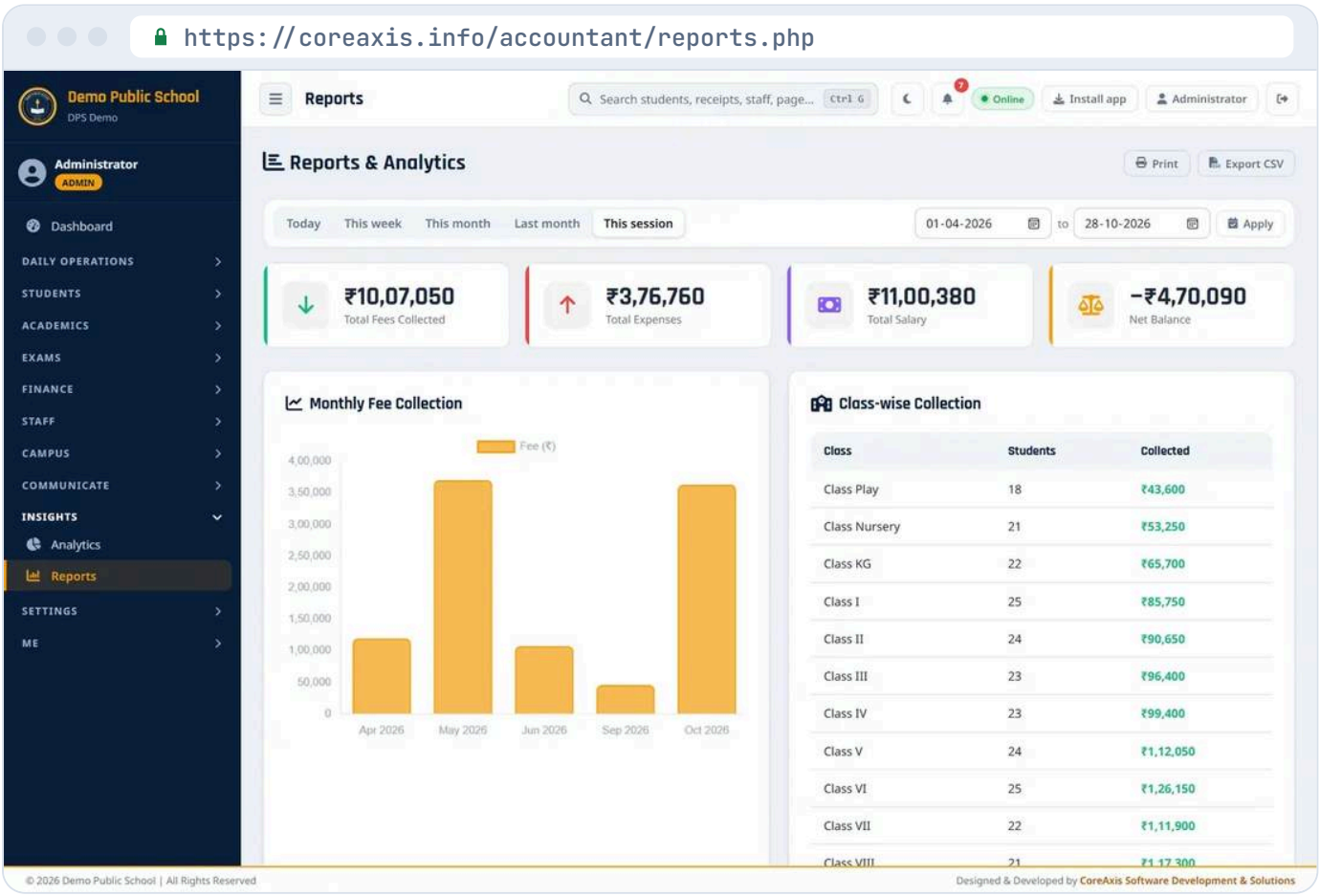
No. The ledger is read-only. Correct the receipt, expense or salary in its own page.

FINANCE · CHAPTER 34

Reports

Admin Principal Accountant MENU Insights › Reports (Accountant: Reports)

Reports is a one-page summary for the management meeting. It shows the totals for a period (fees, expenses, salary and net balance), a chart of fee collection by month, the amount collected from each class and this month's attendance by class. It opens on the running session up to today; choose another period with the period buttons or the From – To dates. Export CSV downloads the same figures for Excel.



Reports — Demo Public School

Screen at a glance

Period buttons	Today, This week, This month, Last month and This session. The selected button is highlighted. The page opens on This session (1 Apr 2026 to today).

From – to + Apply	Any custom period: set the two dates and click Apply. The cards, the chart and Class-wise Collection all use these dates.
Total Fees Collected	All fee receipts in the period. Click to open the Fee Desk.
Total Expenses	Expenses dated within the period. Click to open Expenses.
Total Salary	Net salary paid in the period. Click to open Payroll.
Net Balance	Fees − expenses − salary for the period. A minus figure (shown as −₹4,70,090) means spending is more than fee income. Click to open Finance Ledger.
Monthly Fee Collection	Bar chart of fees collected in each month of the period.
Class-wise Collection	For each class: number of active students and the amount collected in the period.
Attendance Summary (This Month)	For each class: present, absent and leave marks this calendar month and the average attendance %. It does not change with the period.
Print	Prints the page (choose Save as PDF in the print window for a file).
Export CSV	Downloads a CSV file for the chosen period (for example reports_2026-09-01_to_2026-09-30.csv) with the four totals, the month-wise collection and the class-wise collection.

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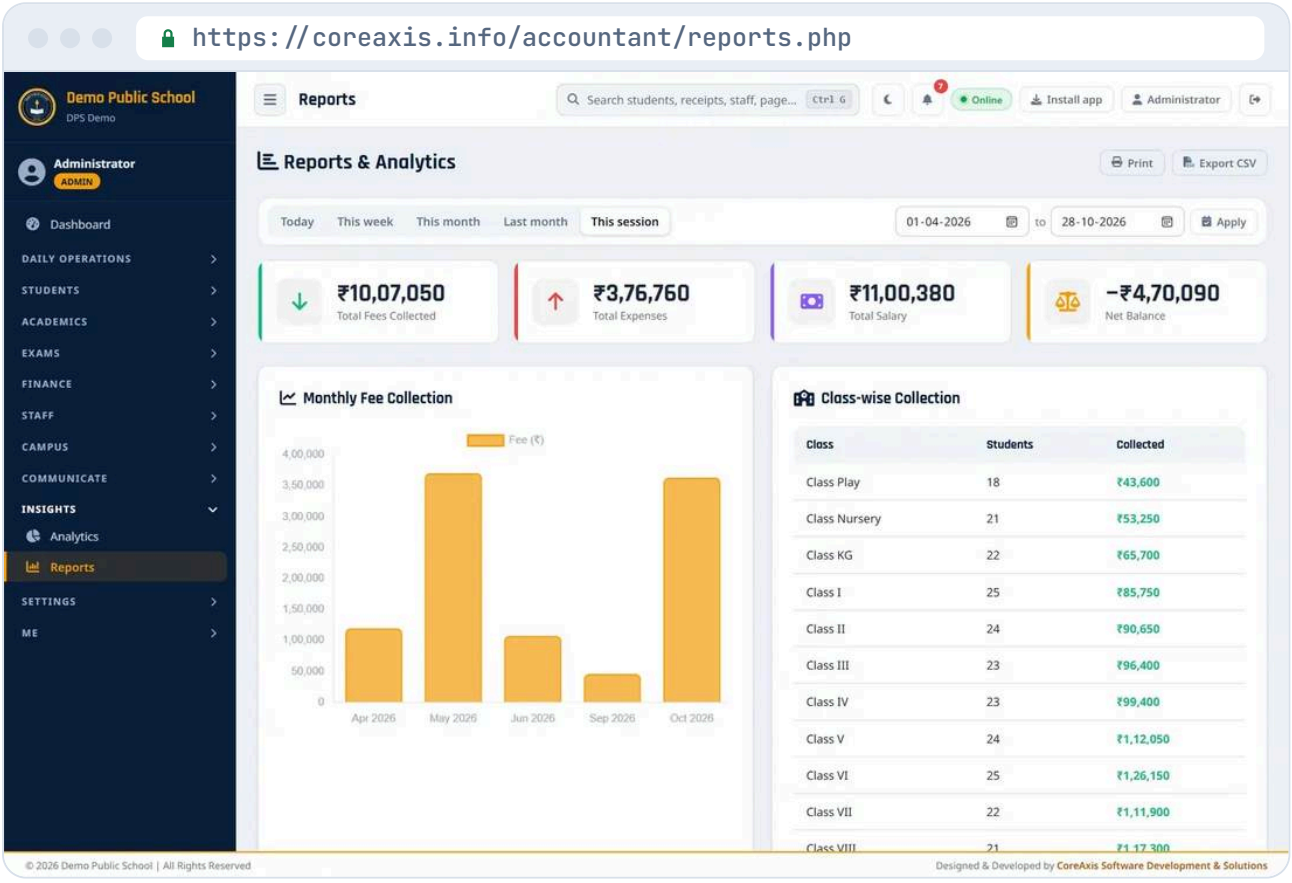
Read and print the session report

1. Open **Reports** from the menu. The page opens on **This session**.

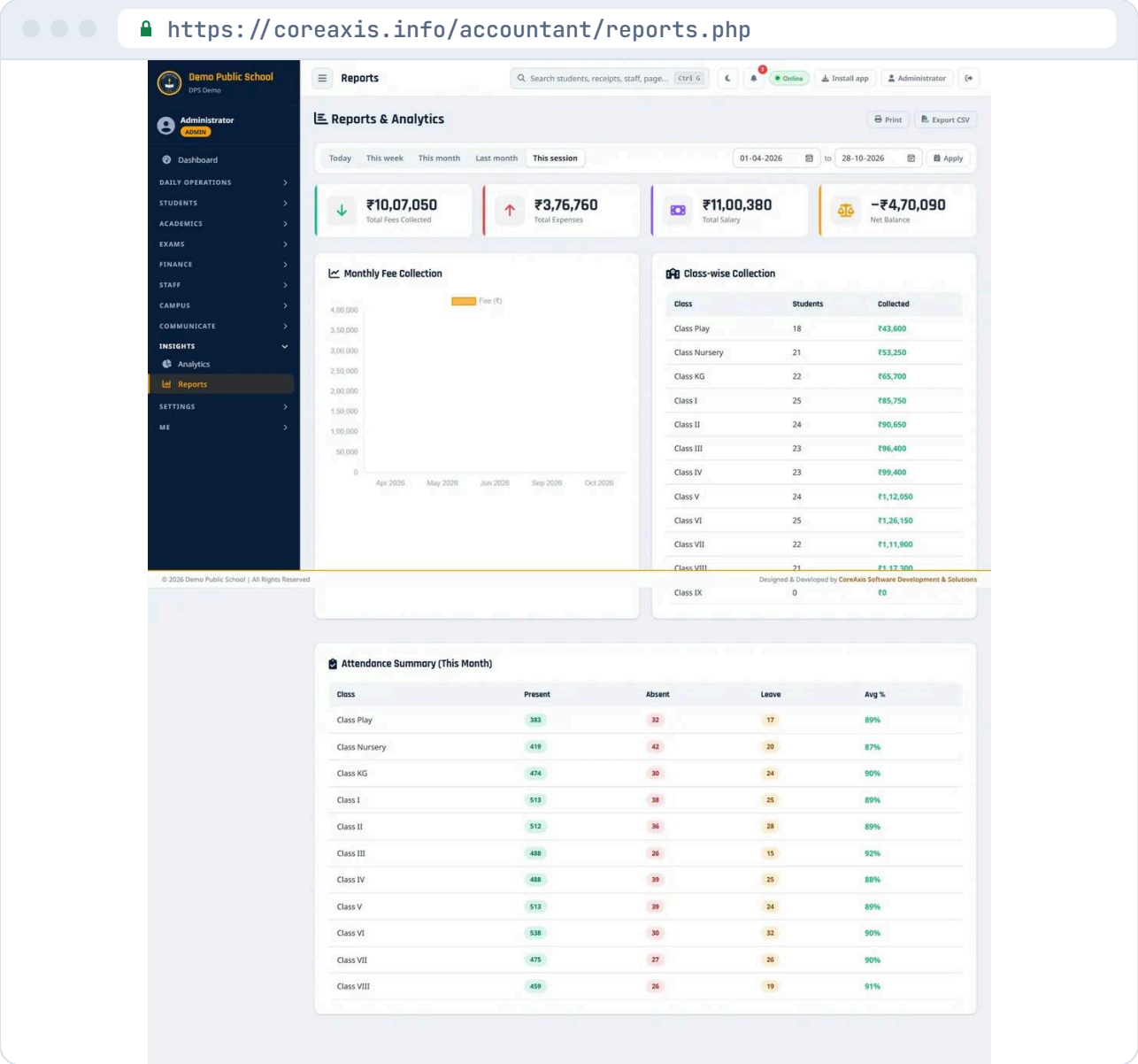


Session totals, monthly fee chart and class-wise collection.

2. Read the four cards. In the demo school (1 Apr – 28 Oct 2026): fees ₹10,07,050, expenses ₹3,76,760, salary ₹11,00,380, so the net balance is −₹4,70,090.

3. Look at the **Monthly Fee Collection** chart to see the months with low collection, then follow up those classes in Fee Dues.

4 Scroll down to **Class-wise Collection** and **Attendance Summary (This Month)**.



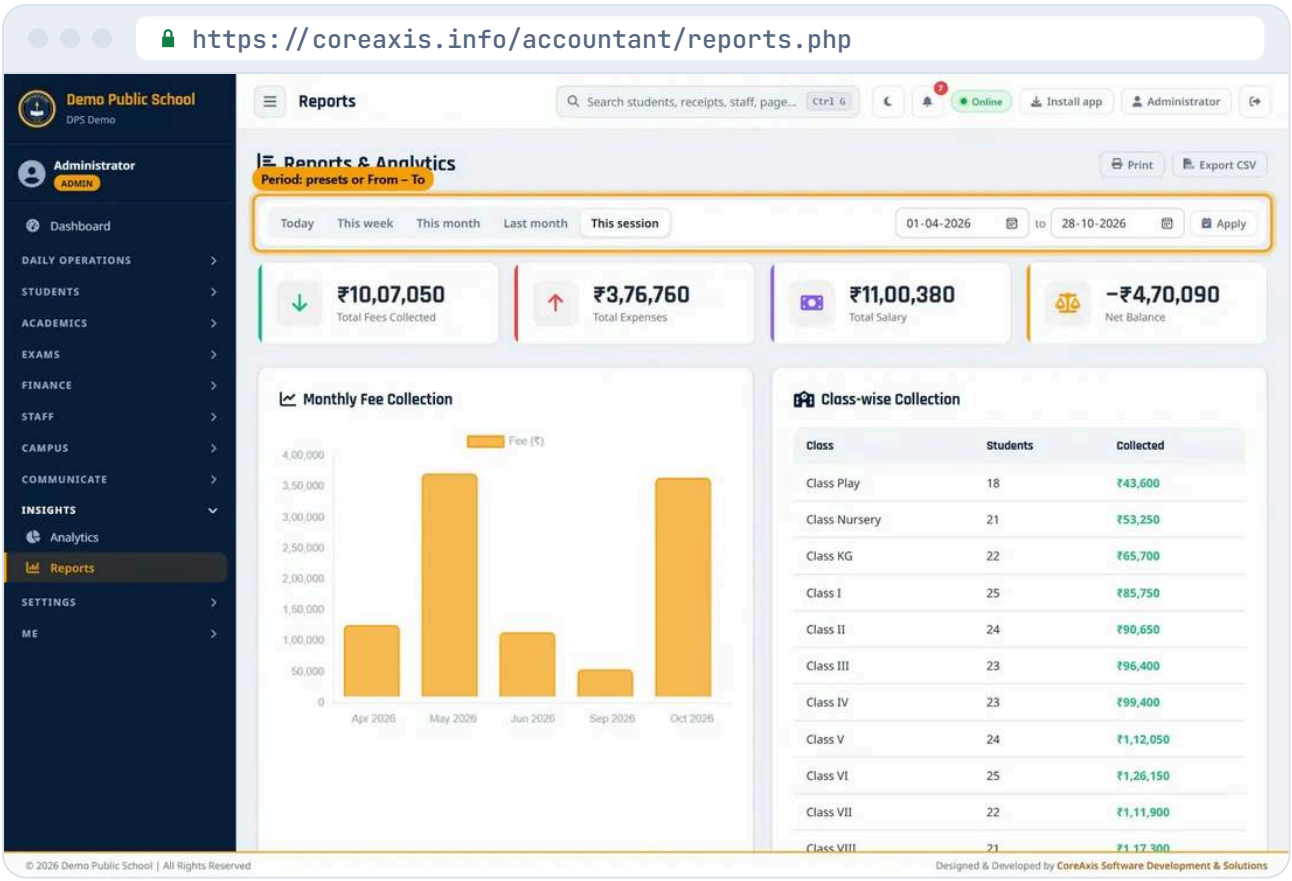
The full Reports page.

5 Click **Print** to print or save the page as PDF for the meeting.

TIP Amounts are shown in Indian style: ₹10,07,050, and a minus balance as −₹4,70,090.

Report for one month and export it (example: September 2026)

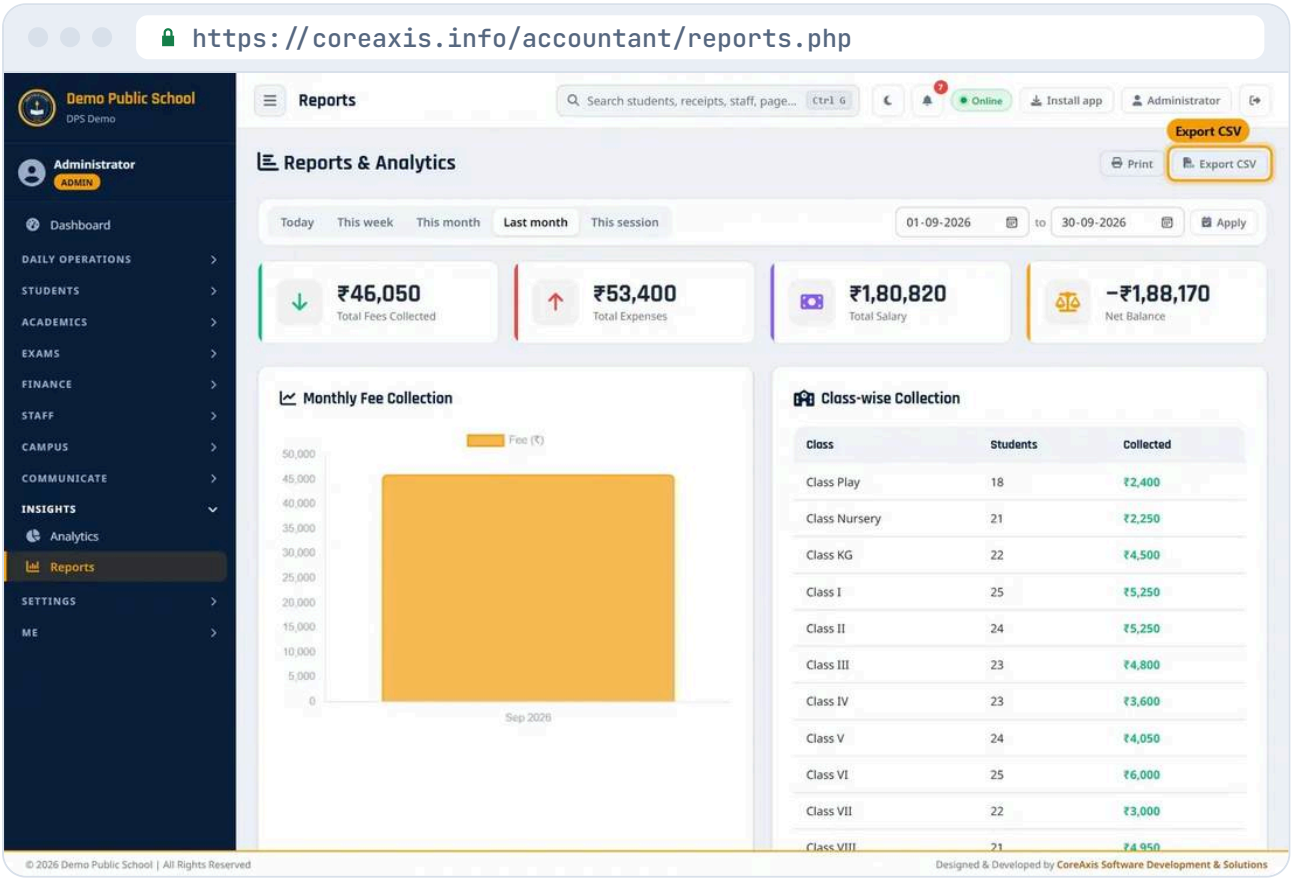
1 Click **Last month** in the period bar, or type **01-09-2026** and **30-09-2026** in the From – to boxes and click **Apply**.



The period bar: preset buttons, or your own From – to dates.

2 The cards now show September only: fees ₹46,050, expenses ₹53,400, salary ₹1,80,820, net balance −₹1,88,170. The chart and Class-wise Collection change to September too.

3 Click **Export CSV**. The file reports_2026-09-01_to_2026-09-30.csv downloads.



September 2026 report with the Export CSV button.

4 Open the file in Excel. It lists the four totals, the collection for each month and the collection for each class (students and amount).

TIP Salary counts on the date it was paid, and expenses on their expense date, so a month's net balance can be minus when salaries were paid in that month.

TIP For a day-by-day list of entries use Finance Ledger, which has the same period bar.

Where to find other finance reports

Defaulter list (CSV)	Fee Dues › Export CSV, all classes or one class.
Day book, Cash Book, Bank Book, P&L (CSV / print)	Finance Ledger, any date range.
Expense list (CSV)	Expenses › Export CSV, one month.

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Concession register	Concessions › Register tab.
Cheque register	Cheques / DD › All tab.
Charts and trends	Insights › Analytics (Admin / Principal).

Questions

Can I see last session's report?

Yes. Type the dates of that session in the From – to boxes (for example 01-04-2025 to 31-03-2026) and click Apply. The cards, chart and class-wise table cover those dates.

Why does Attendance Summary not change when I change the period?

It always shows the current calendar month. For other months use Attendance › Attendance Register.

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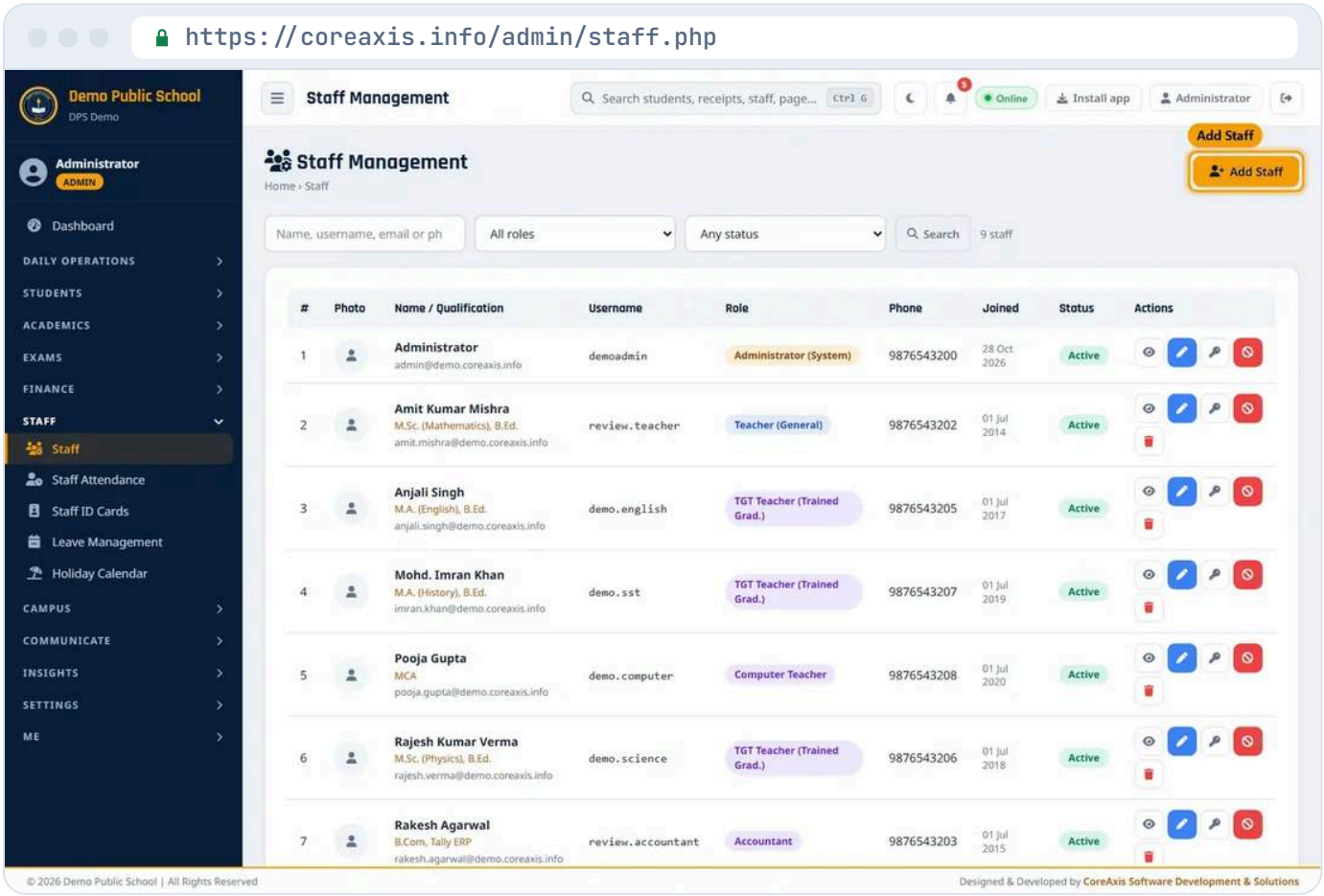
STAFF · CHAPTER 35

Staff

Admin Principal MENU Staff › Staff

The Staff page is the school's list of every employee: teachers, office staff and support staff. Each staff member's **Role / Designation** decides what they can open after signing in (Admin, Teacher or Accountant screens) or whether they get no login at all. The same list feeds Staff Attendance, Staff ID Cards, Leave Management, Salary / Payroll and the Timetable.

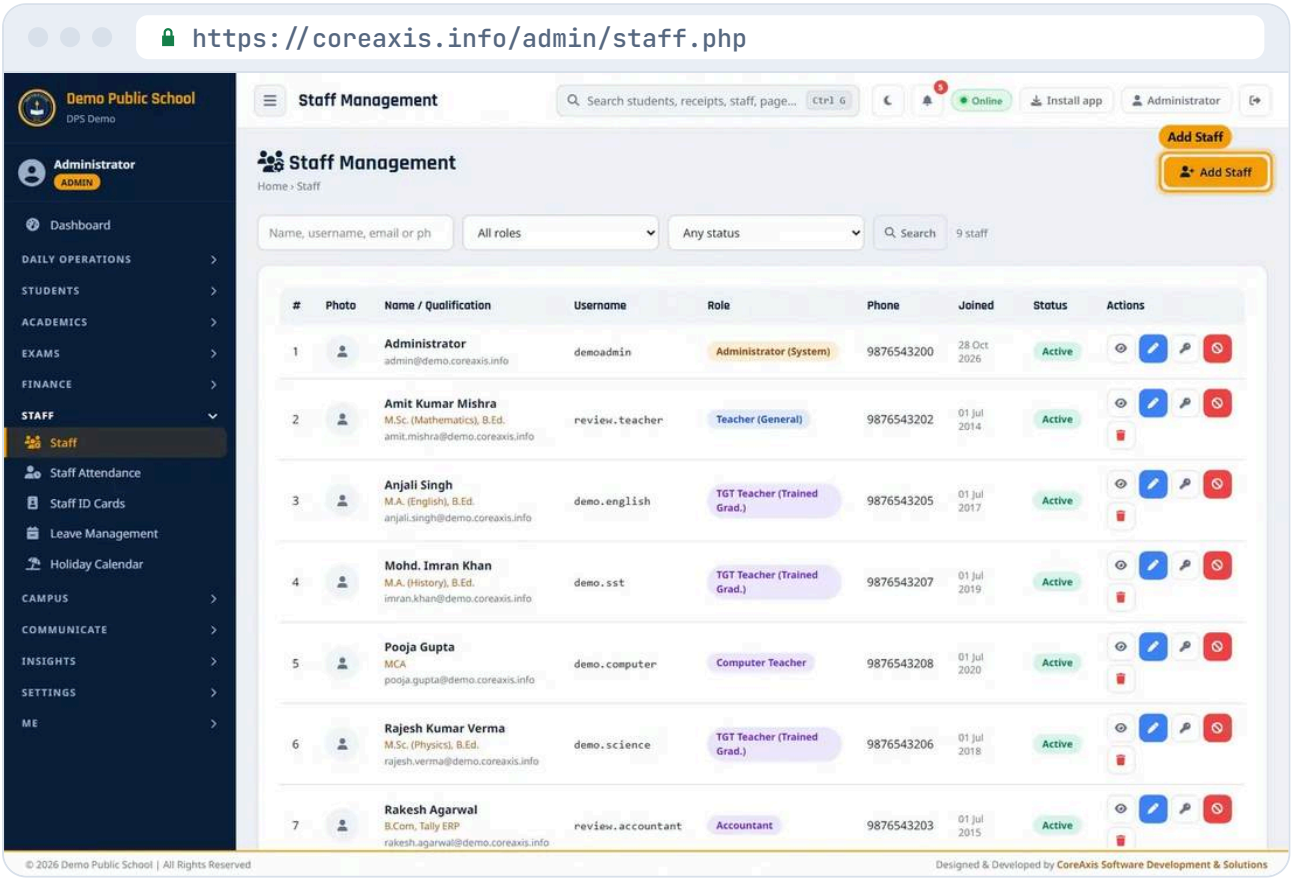


Staff — Demo Public School

Add a staff member (example: Priya Kumari Jha, new TGT Sanskrit teacher)

Priya Kumari Jha joins Demo Public School on 28 October 2026 as a TGT teacher for Sanskrit. She needs a teacher login.

1 Open **Staff › Staff** in the left menu and click **Add Staff** at the top right.

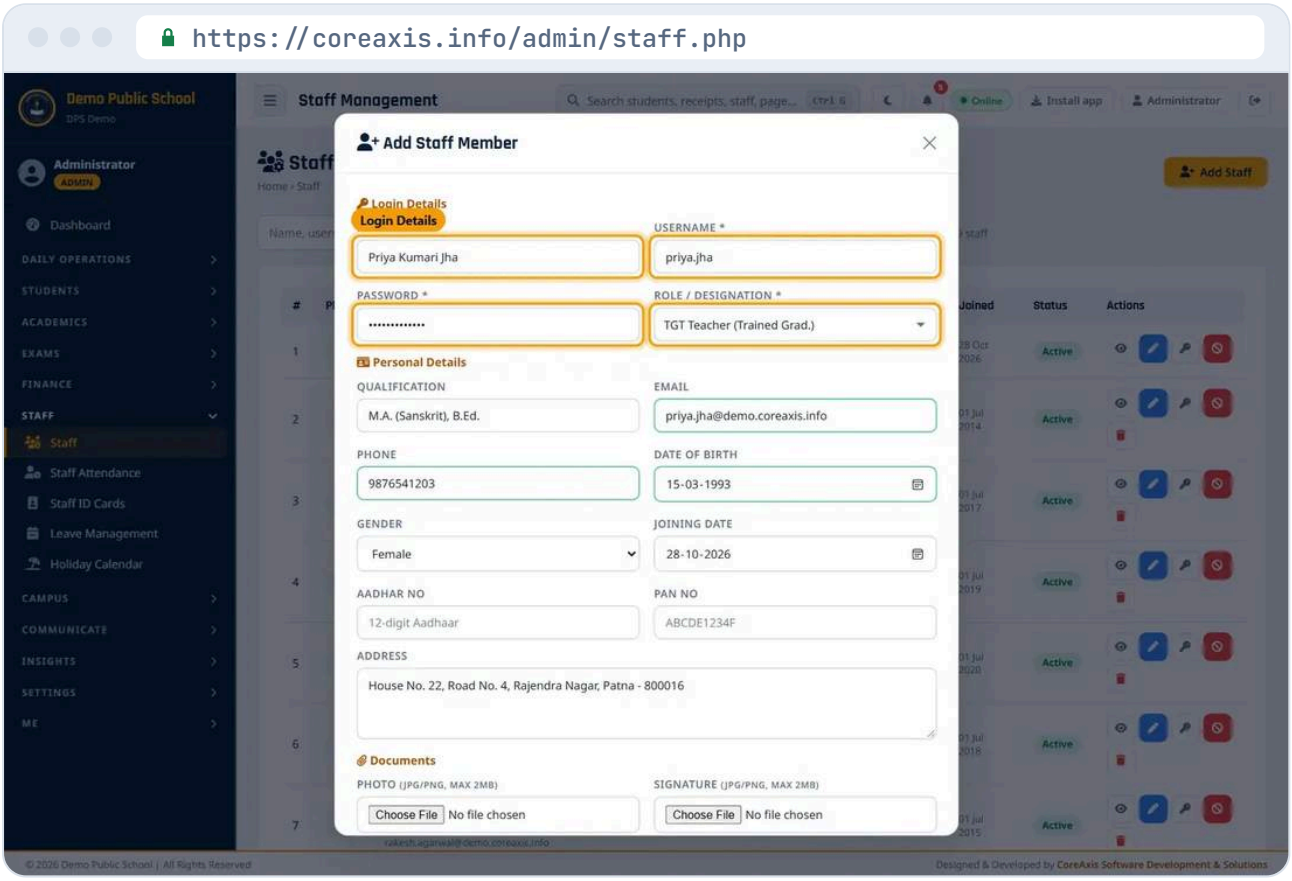


The staff list with the Add Staff button.

2 Under **Login Details**, type the **Full Name** (Priya Kumari Jha) and a **Username** (priya.jha).

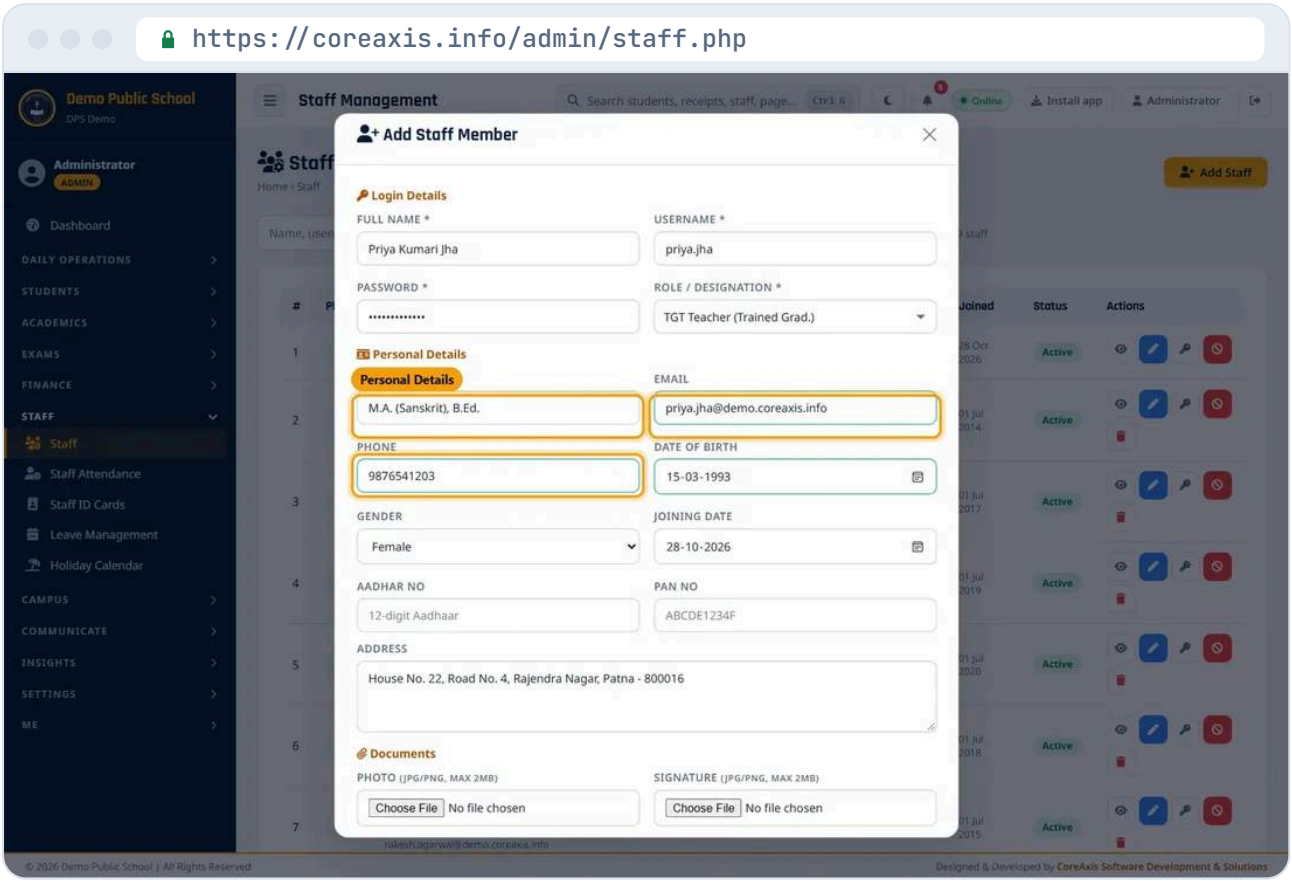
3 Type a starting **Password** (••••••••). It must have at least 8 characters with an uppercase letter, a lowercase letter and a number. Tell the teacher privately and ask her to change it after her first sign-in.

4 In **Role / Designation**, choose **TGT Teacher (Trained Grad.)**.



Login Details: name, username, password and role.

5 Under **Personal Details**, fill **Qualification** (M.A. (Sanskrit), B.Ed.), **Email** (priya.jha@demo.coreaxis.info) and **Phone** (9876541203). The email is her sign-in ID, so it is required and must not be used by anyone else.

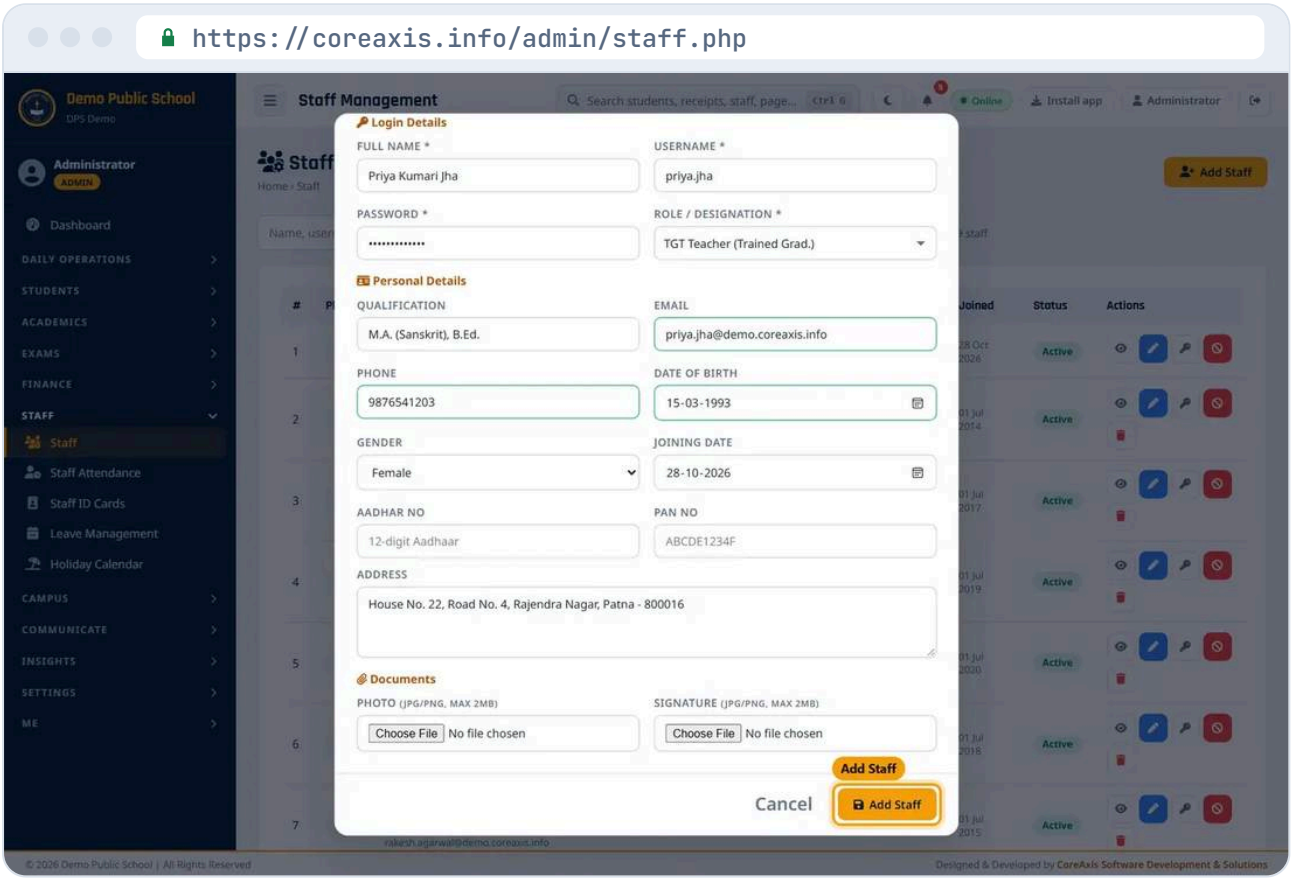


Personal Details with qualification, email and phone.

6 Fill **Date of Birth**, **Gender**, **Joining Date** and **Address**. **Aadhar No** and **PAN No** are optional.

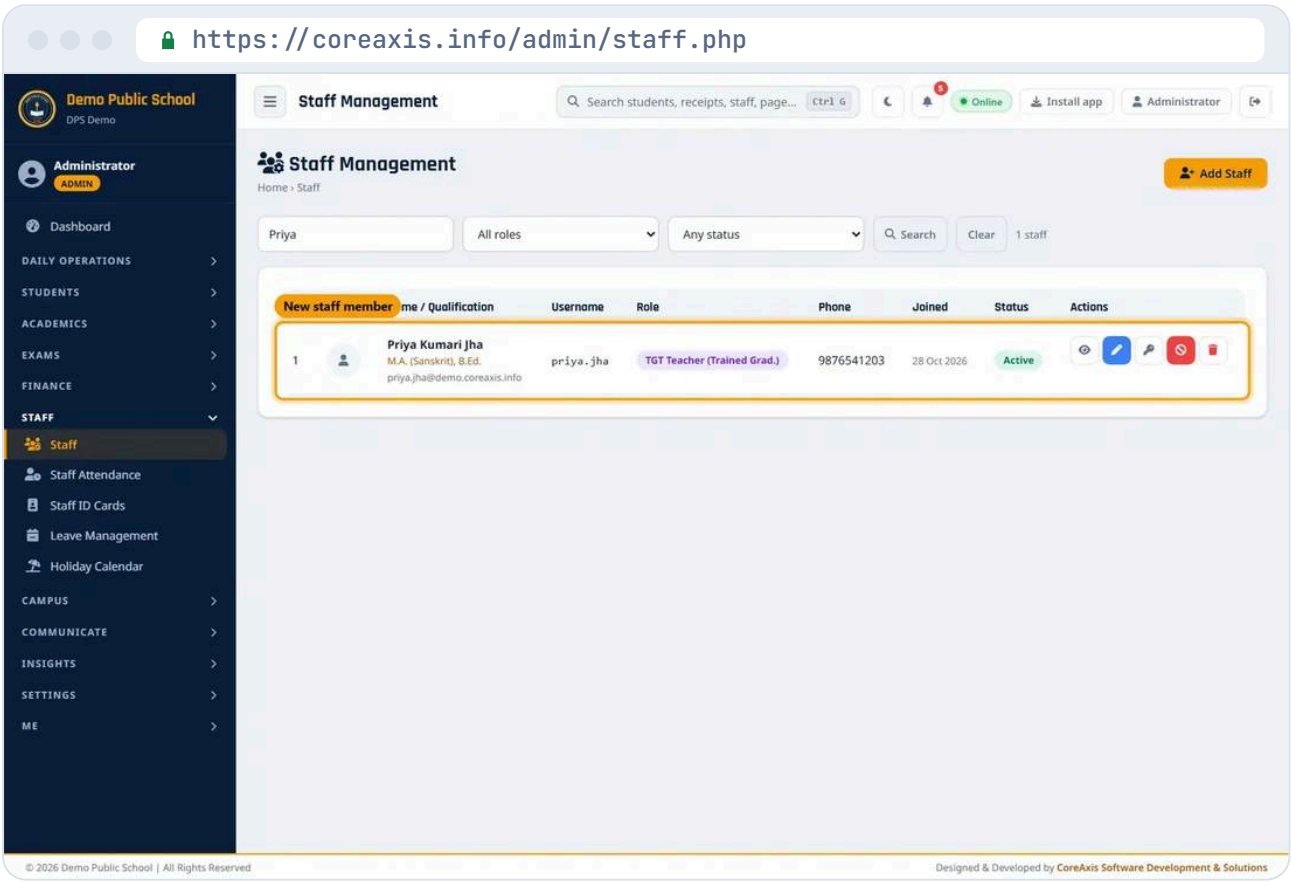
7 Under **Documents**, choose a **Photo** and a **Signature** if you have them (JPG/PNG, up to 2 MB each). The photo appears on the staff ID card.

8 Click **Add Staff**, then confirm in the popup.



Click Add Staff to save.

9 The message **Staff member added!** appears and Priya is now in the list with the status **Active**.



The new teacher in the staff list.

TIP If you leave **Username** blank, the app makes one from the email address.

TIP Your plan sets the maximum number of active staff. If the limit is reached, the app sends you to **Plan & Billing**.

TIP A new teacher sees only the classes and subjects you give her. Assign her subjects in **Academics › Subjects** and periods in **Timetable**.

Choose the right role: who gets which login

The role groups in the **Role / Designation** list decide the screens a person sees. Roles marked **(No Login)** are for staff who are on the rolls (attendance, salary, ID card) but never sign in.

Leadership: Principal / Director, Vice Principal, Administrator (System)	Full admin screens: every module, approvals, settings, school profile and billing.
Teaching Staff: Head Teacher / HOD, PGT, TGT, PRT, Computer, PTI / Sports, Art, Music, Counselor, Lab Assistant, Librarian, Teacher (General)	Teacher screens: attendance and marks for their own classes, homework, timetable, notices, Library Desk, Competitions and the Me menu.
Finance & Admin: Accountant, Cashier, Office Clerk	Accountant screens: Fee Desk, Fee Dues, Concessions, Cheques, UPI / Bank Claims, Expenses, Payroll, Finance Ledger, Reports and the Me menu.
Support Staff (No Login): Nurse, Peon / Helper, Security Guard, Bus Driver, Housekeeping, Other	No sign-in. They still appear in Staff Attendance, Salary / Payroll and Staff ID Cards.

View a staff profile

1. Type part of the name, username, email or phone in the search box and click **Search** (or filter by role and status).

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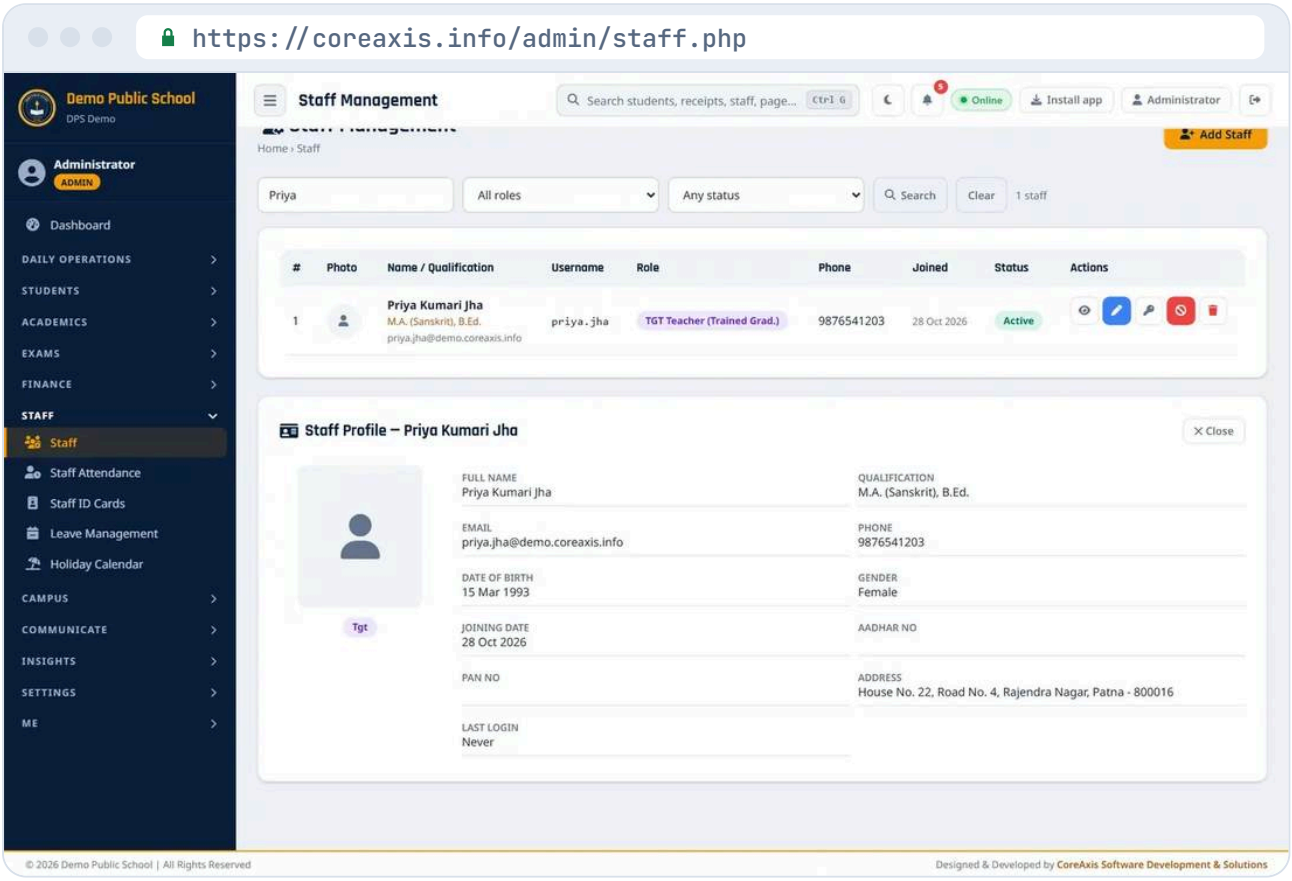
2 Click the eye icon (**View Profile**) in the **Actions** column.



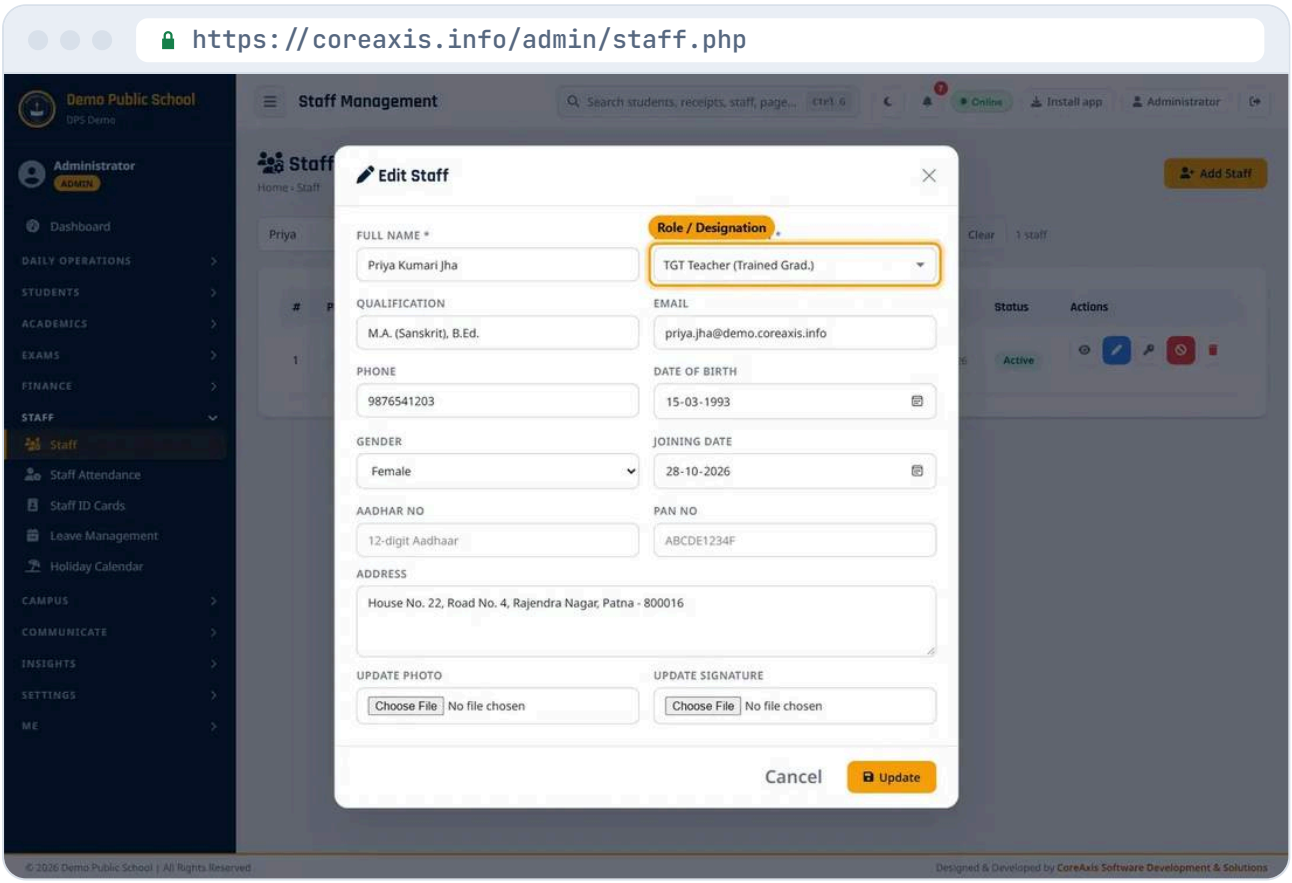
Staff Profile shows photo, signature, role and all personal details, including Last Login.

3 Click ✕ **Close** to hide the profile.

Edit details or change a role

1 Click the blue pencil icon (**Edit**) on the staff member's row.

2 Correct the details. To give extra rights, change **Role / Designation** (for example from TGT Teacher to Head Teacher / HOD).



Edit Staff opens with the staff member's current role: TGT Teacher (Trained Grad.) for Priya Kumari Jha.

3 Use **Update Photo** or **Update Signature** to replace the pictures.

4 Click **Update** and confirm.

TIP Check the **Role / Designation** box before you click Update. It shows the role saved now; change it only if you mean to change the person's rights.

IMPORTANT Before you click Update, check that the Role / Designation box shows the person's real role. Changing a teacher to a Leadership role gives them full admin access.

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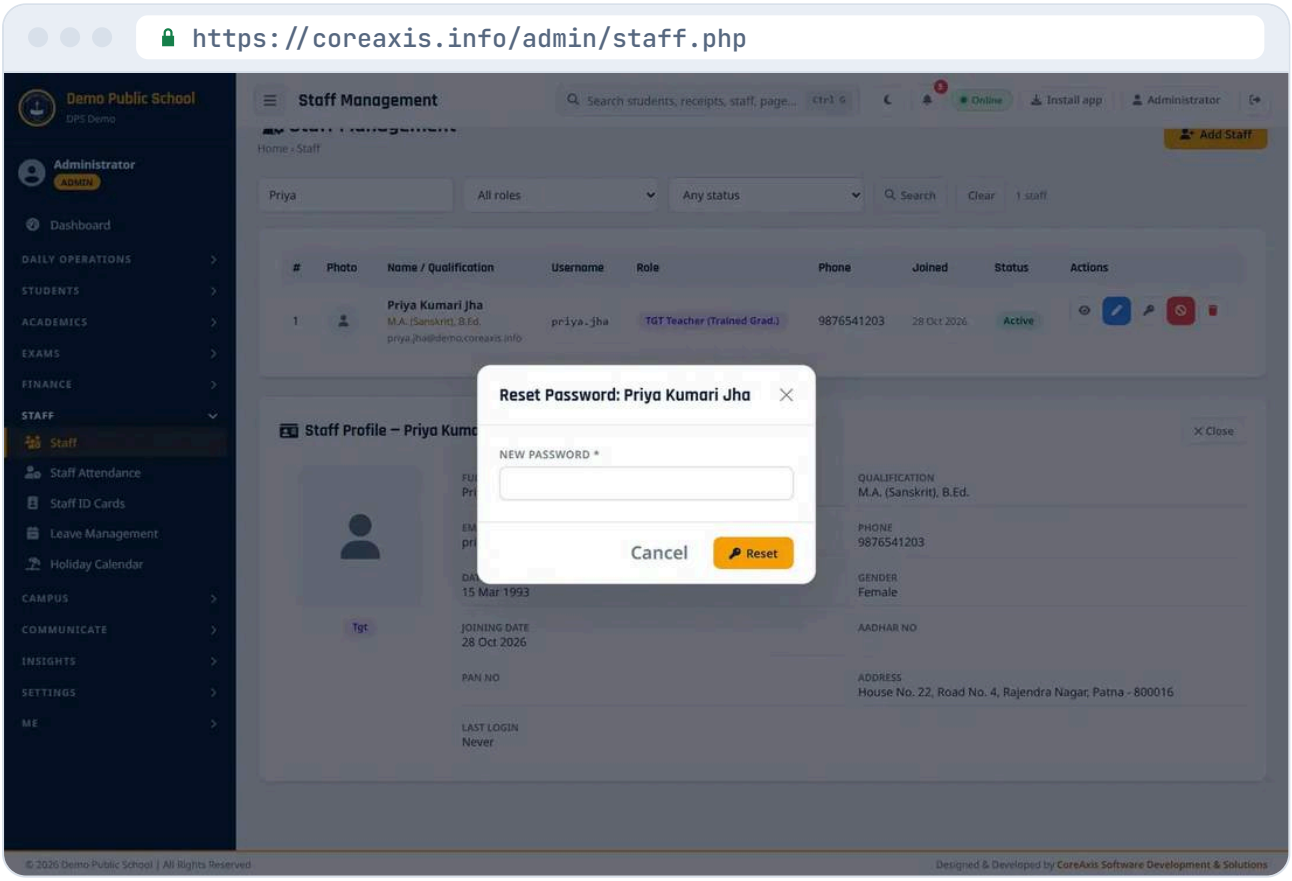
Reset a password, deactivate or delete

1. If a staff member forgets the password, click the key icon (**Reset Password**), type a new password (••••••••) and click **Reset**. They are signed out of all their devices.



Reset Password for one staff member.

2. When someone leaves, click the red circle icon (**Toggle**) to make them **Inactive**. Their login stops working, trusted devices and PINs are removed, and their past records stay.

3. Click the bin icon (**Delete**) only for an account made by mistake. The app asks twice.

IMPORTANT Delete removes the account permanently and cannot be reversed. For staff who leave, use Toggle (Inactive) instead, so attendance, salary and leave history stay.

Screen at a glance

Search box	Finds staff by name, username, email or phone.
All roles / Any status	Filters the list by role or by Active / Inactive.

# / Photo / Name / Qualification	Name in bold, qualification in saffron, email below. A warning badge shows if the email cannot receive sign-in codes.
Username	The short login name (sign-in also works with the email).
Role	The designation chosen in Role / Designation.
Phone / Joined	Mobile number and joining date.
Status	Active (can sign in) or Inactive.
Actions	View Profile, Edit, Reset Password, Toggle (activate / deactivate), Delete.

Questions

The new teacher says she did not get a sign-in code.

The first sign-in on a new device sends a 6-digit code to the staff member's email. Check the email address on her profile for spelling, then ask her to look in the spam folder.

Can a peon or bus driver have a login?

No. Support Staff roles are marked (No Login). They are kept on the rolls for attendance, salary and ID cards only.

A teacher left mid-year. Should I delete her?

No. Click Toggle to make her Inactive. Deleting removes her account and breaks the link to her past attendance, salary and leave records.

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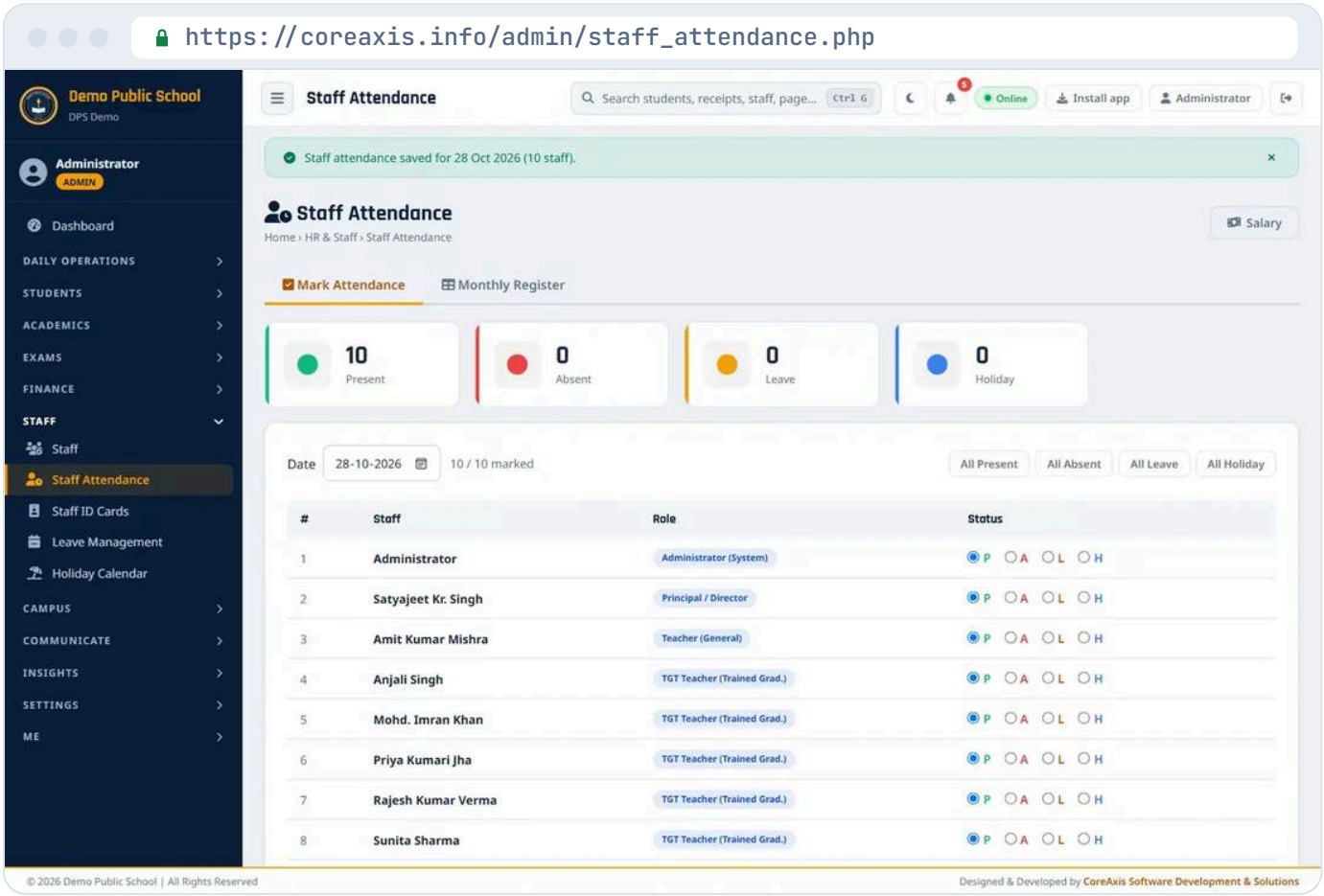
STAFF · CHAPTER 36

Staff Attendance

Admin Principal MENU Staff › Staff Attendance

The office marks each staff member Present, Absent, on Leave or Holiday once a day. The **Monthly Register** shows the whole month in one grid. Salary / Payroll reads this register: it pays Present + Holiday + sanctioned leave days, and deducts Leave Without Pay or half-pay leave as a separate line. Each staff member can see their own record under **Me › My Attendance**.

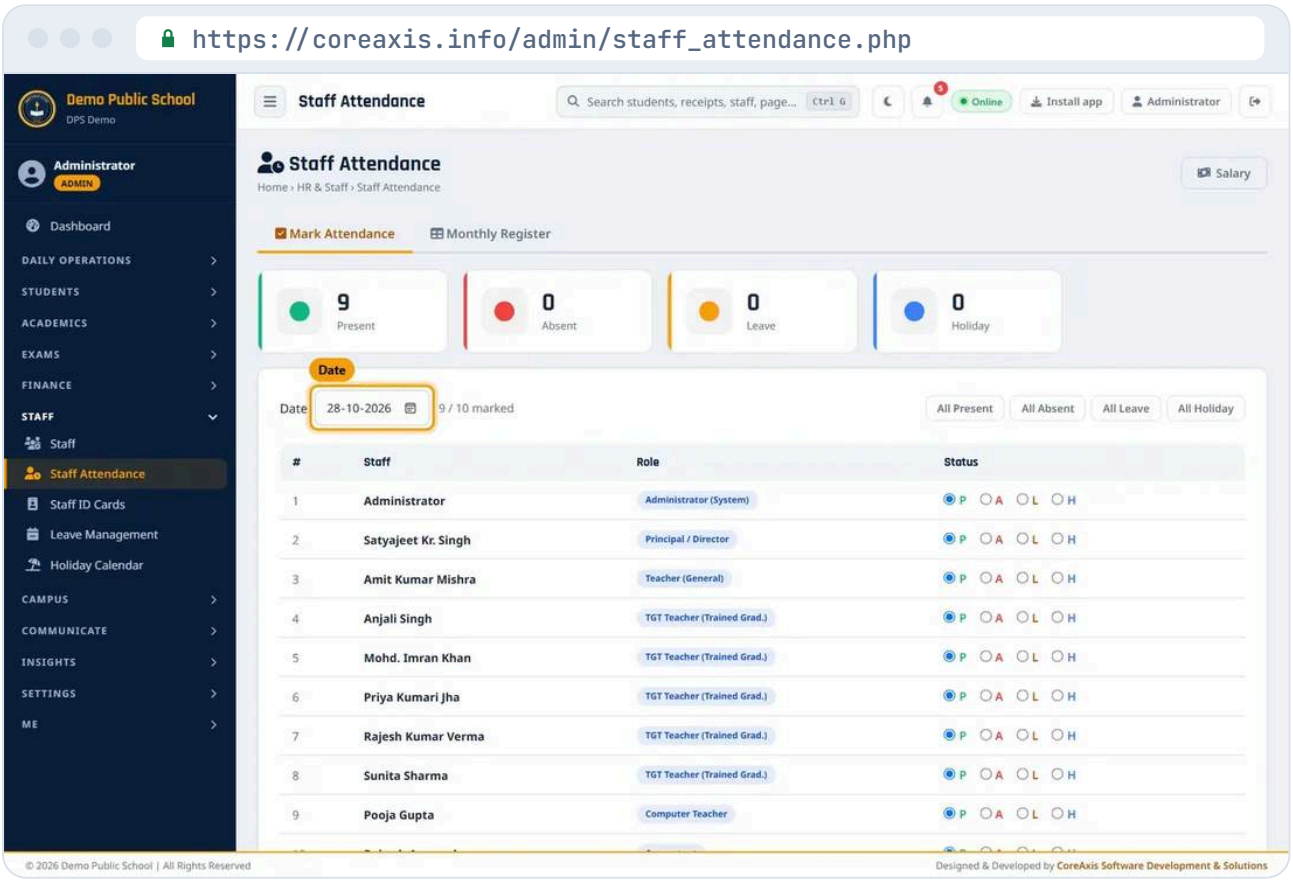


Staff Attendance — Demo Public School

Mark today's attendance (example: 28 October

2026, new teacher Priya Kumari Jha present)

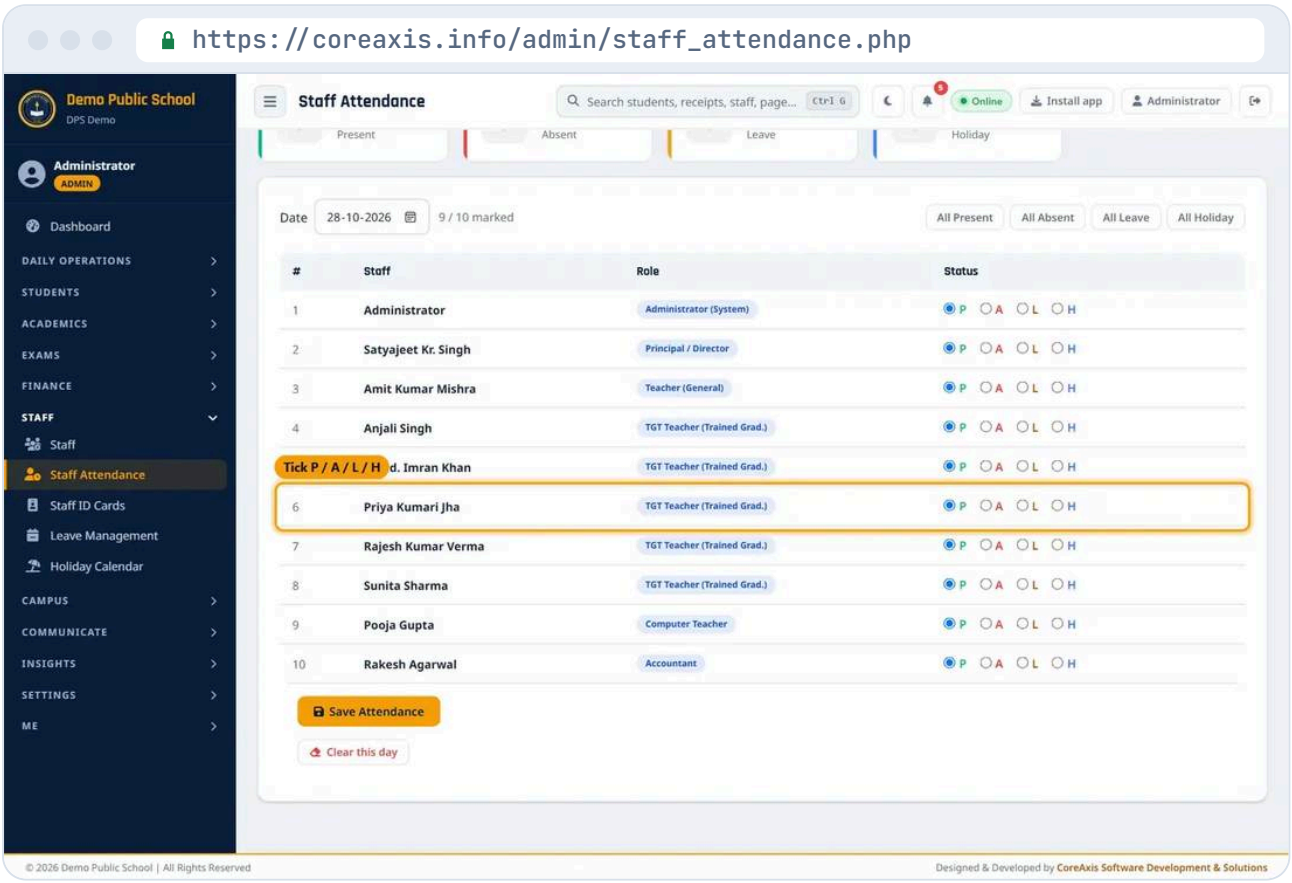
1. Open **Staff › Staff Attendance**. The **Mark Attendance** tab opens with today's date.



Mark Attendance for today, with counts at the top.

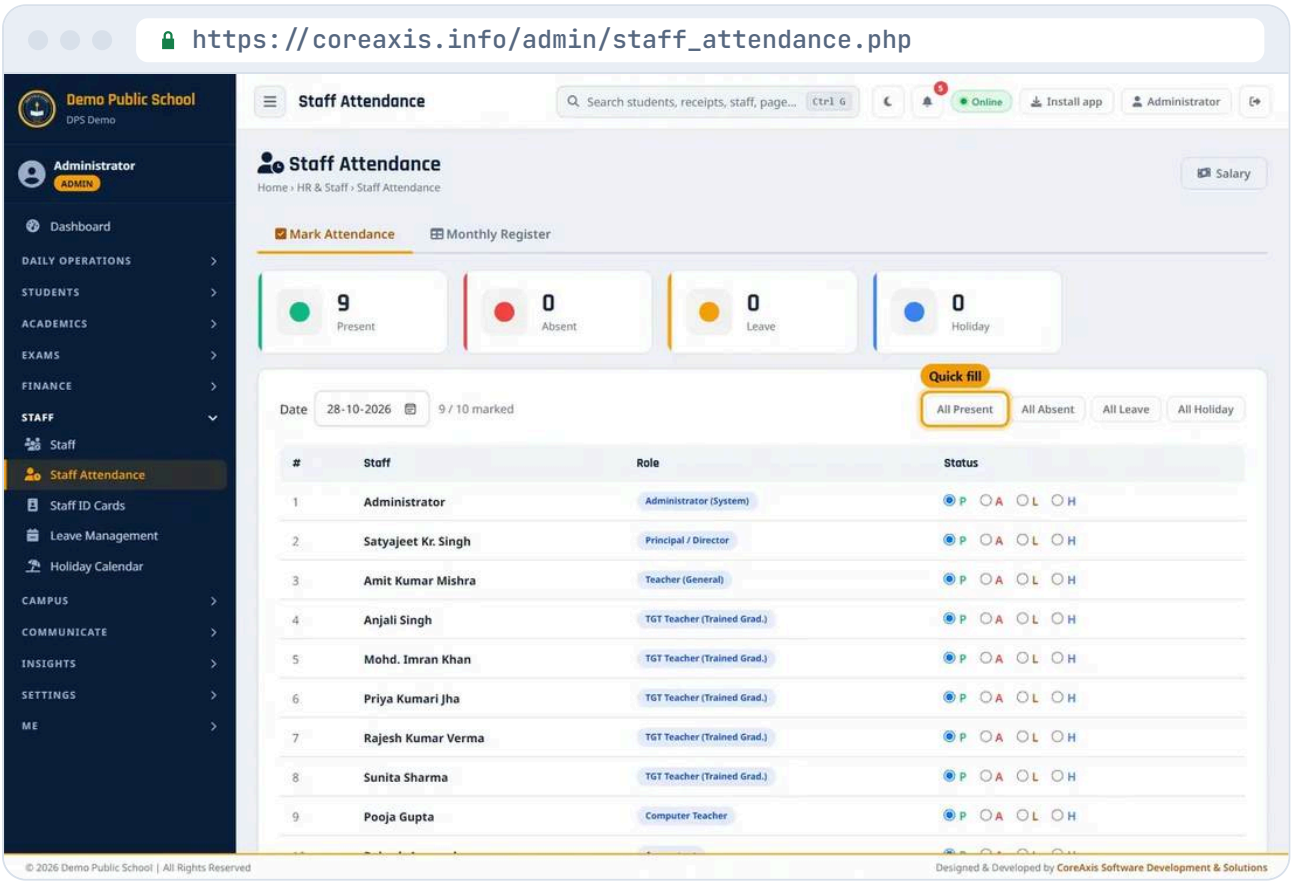
2. To mark another day, change the **Date** box.

3 For each staff member, tick **P** (present), **A** (absent), **L** (leave) or **H** (holiday). Here, tick **P** for Priya Kumari Jha.



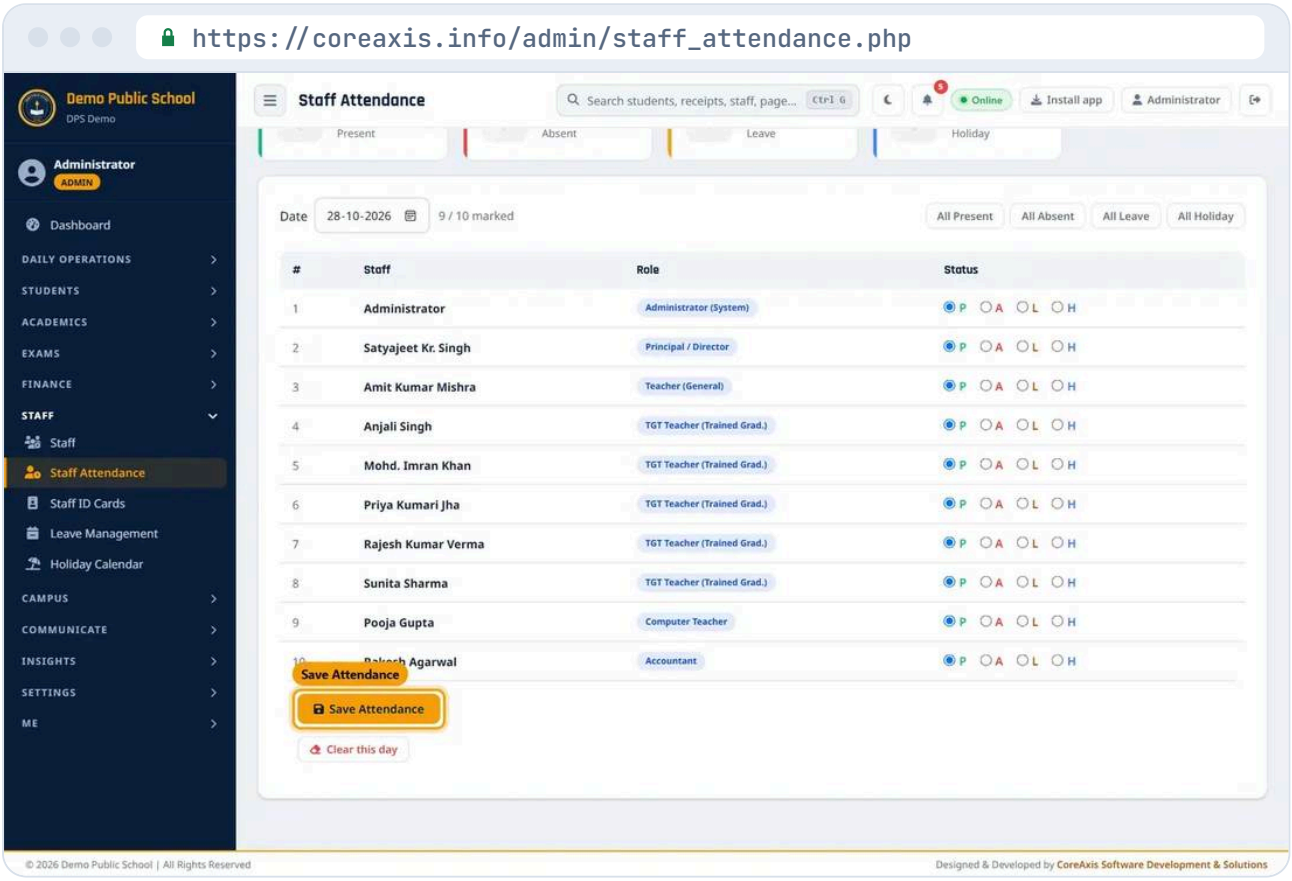
One row per staff member with P / A / L / H.

4 To fill everyone at once, click **All Present** (or **All Absent**, **All Leave**, **All Holiday**), then change only the exceptions.



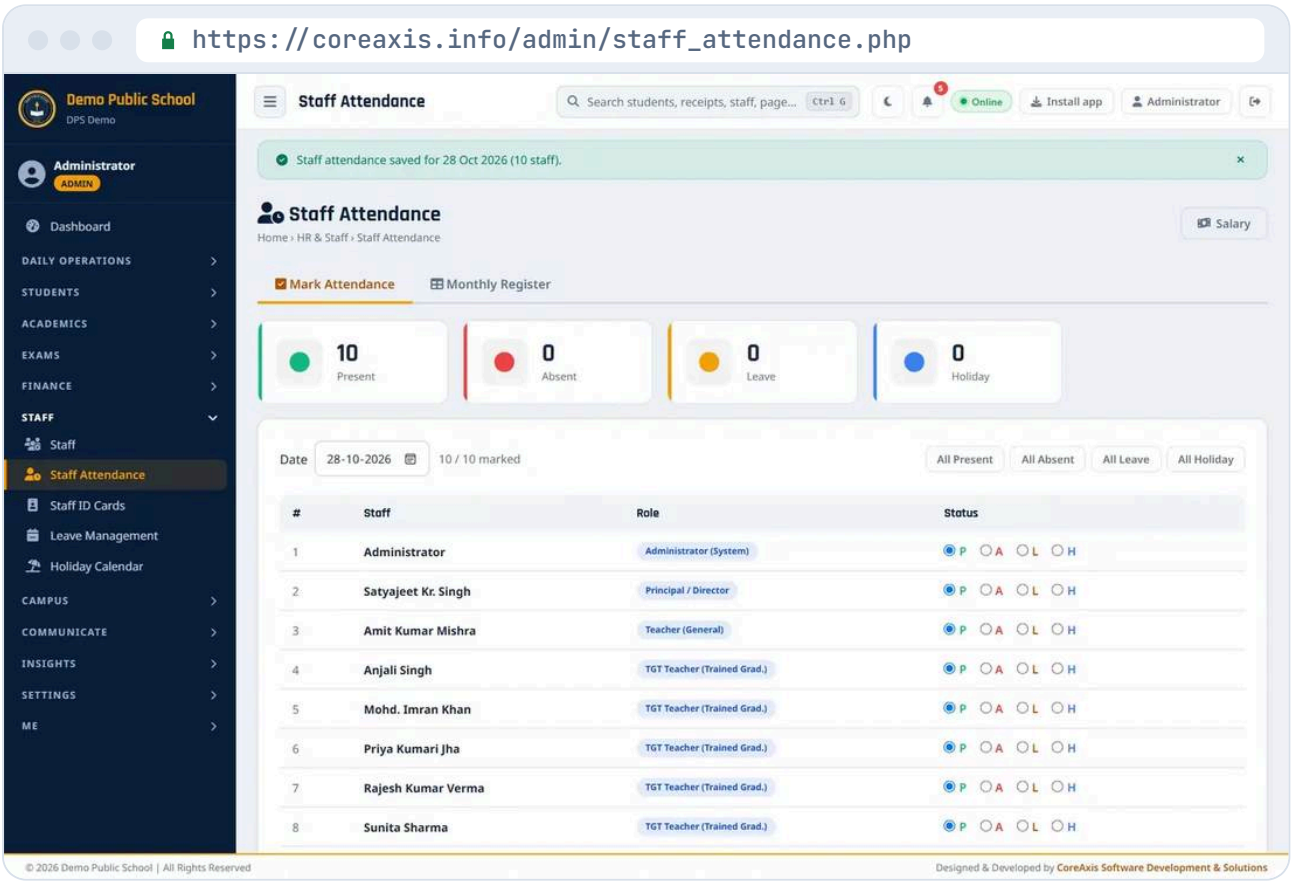
Quick-fill buttons above the list.

5 Click **Save Attendance** at the bottom and confirm.



Save Attendance.

6 The message **Staff attendance saved for 28 Oct 2026 (10 staff)** appears and the counter shows **10 / 10 marked**.



Saved: 10 present, 0 absent.

TIP A staff member with approved leave on that day shows a leave badge next to the name; mark them **L** .

TIP Sundays and holidays from the Holiday Calendar are shaded in the register; you do not need to mark them.

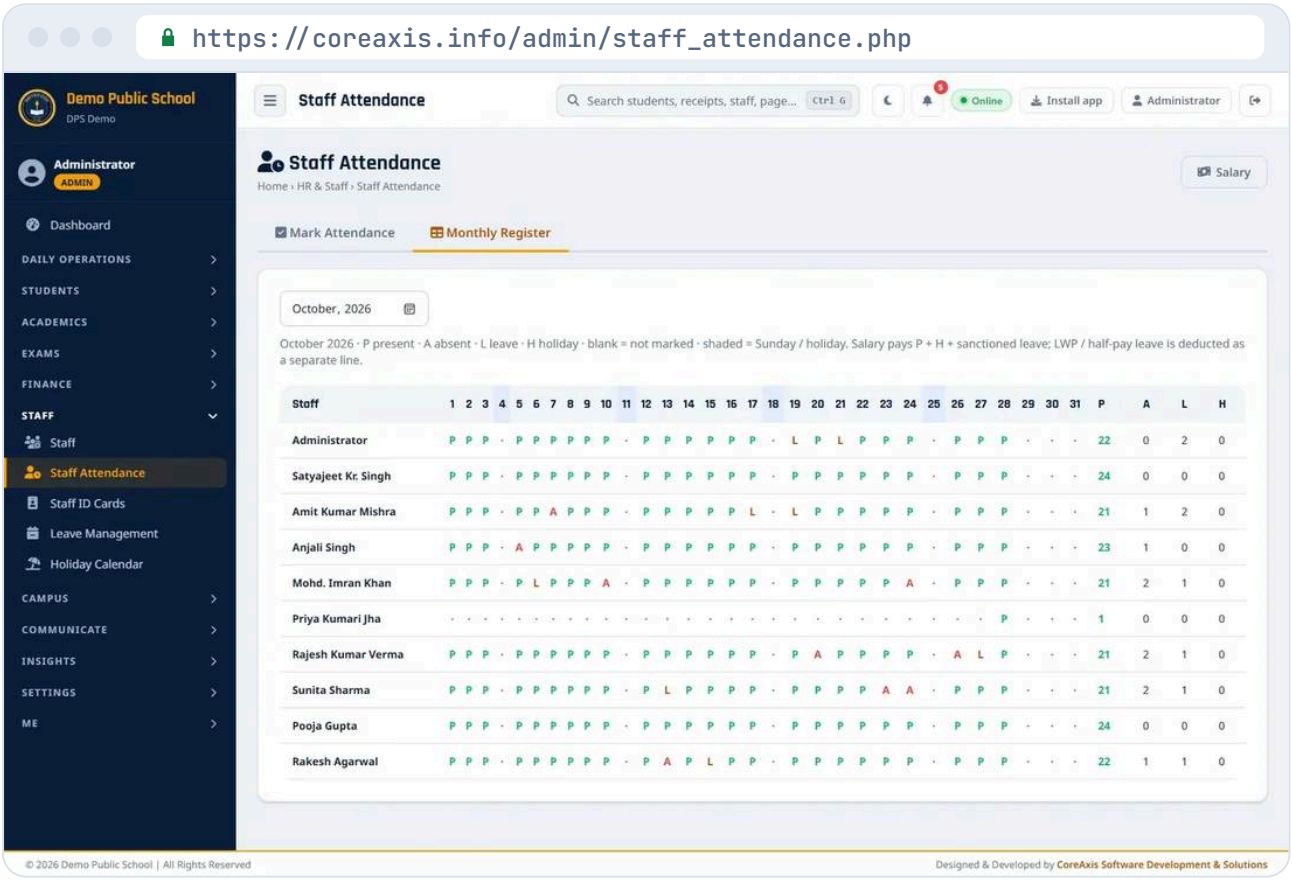
TIP You can save again later in the day; the new choice replaces the old one.

IMPORTANT Clear this day removes every staff mark for the selected date. Use it only if you marked the wrong date.

Read the Monthly Register

1 Click the **Monthly Register** tab.

2 Pick the month in the month box (for example **October 2026**).



One row per staff member, one column per day, totals on the right.

3 Read the totals in the **P**, **A**, **L** and **H** columns. These are the days Payroll uses for the month.

Screen at a glance

Present / Absent / Leave / Holiday cards	Counts for the selected date.
Date and 'x / y marked'	The day being marked and how many staff already have a status.
Status (P / A / L / H)	P present, A absent, L leave, H holiday.
Salary button	Opens Finance › Salary / Payroll.
Monthly Register legend	Blank = not marked; shaded = Sunday or holiday; · = no mark on an off day.

Questions

I forgot to mark attendance yesterday.

Change the Date box to yesterday, mark everyone and click Save Attendance.

A teacher was on approved leave. What do I mark?

Mark L. The leave badge next to the name links to the approved application. Salary pays sanctioned leave as per its type (full pay, half pay or without pay).

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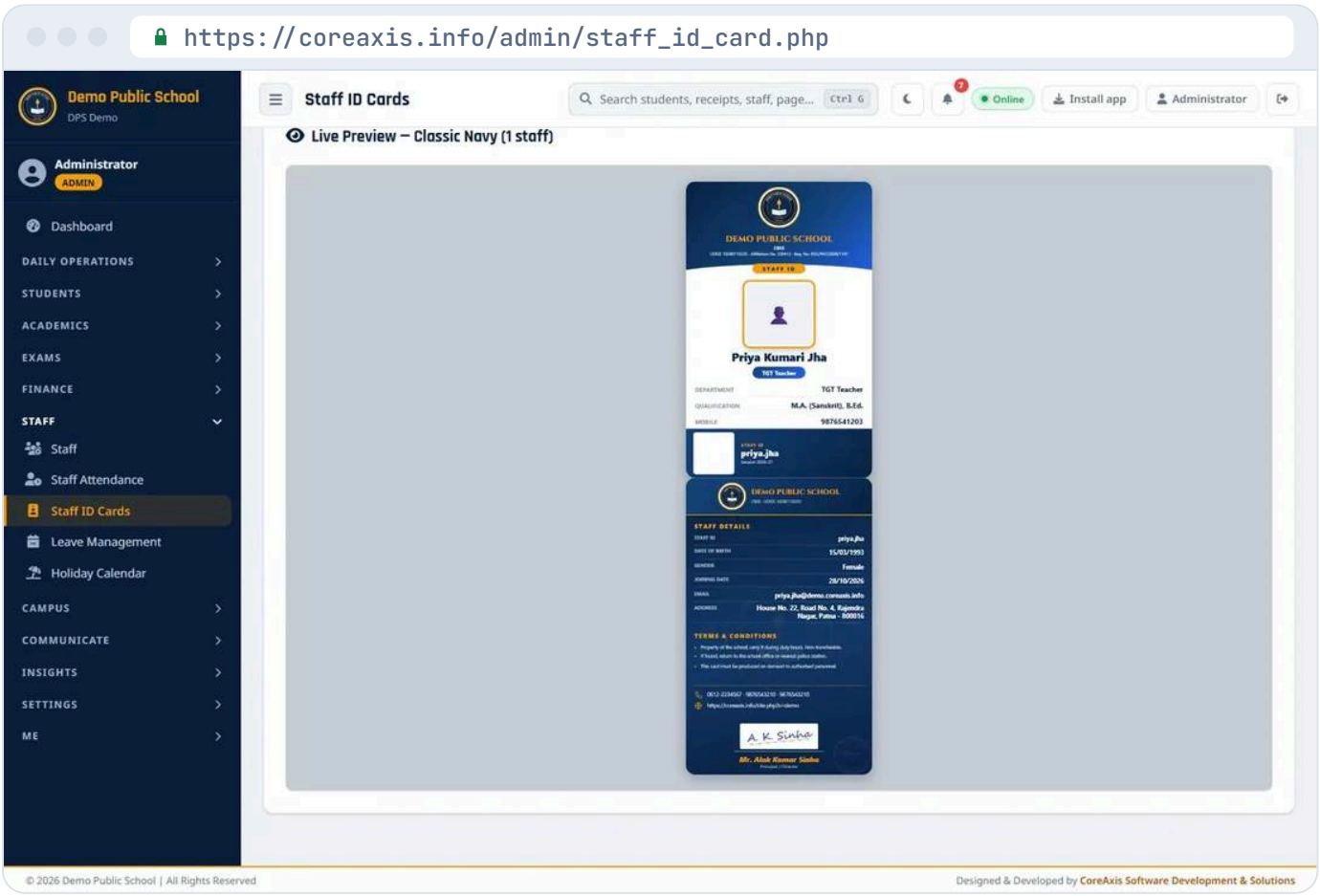
STAFF · CHAPTER 37

Staff ID Cards

Admin Principal MENU Staff › Staff ID Cards

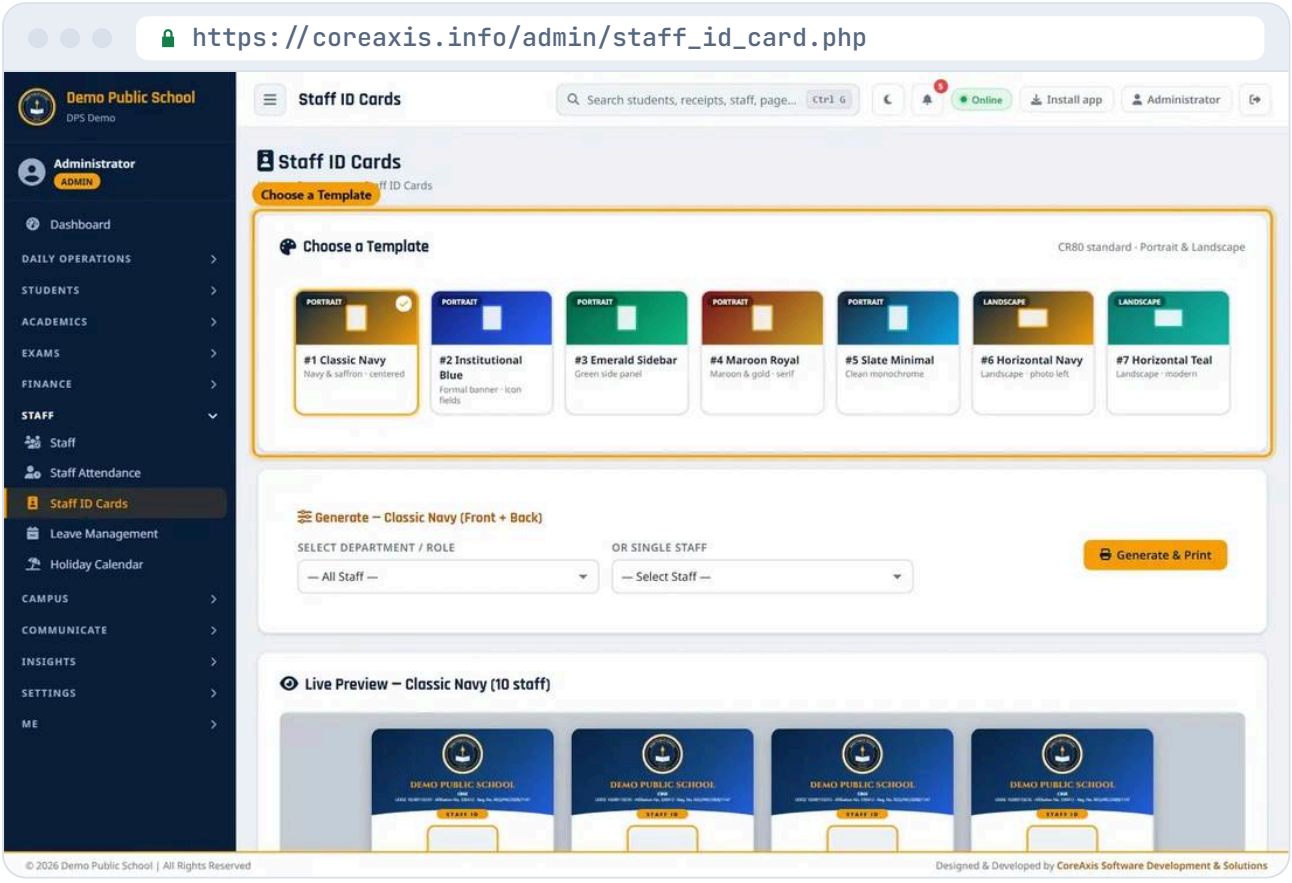
Staff ID Cards are built from the Staff list and the School Profile: name, photo, role, qualification, mobile, staff ID, joining date, address, the school's name, UDISE and affiliation numbers, and the principal's signature. Cards are the standard CR80 size (credit-card size) with a front and a back. Each card is printed through the Document Register, so the first print is marked ORIGINAL and a reprint DUPLICATE.



Staff ID Cards — Demo Public School

Print an ID card for one staff member (example: Priya Kumari Jha)

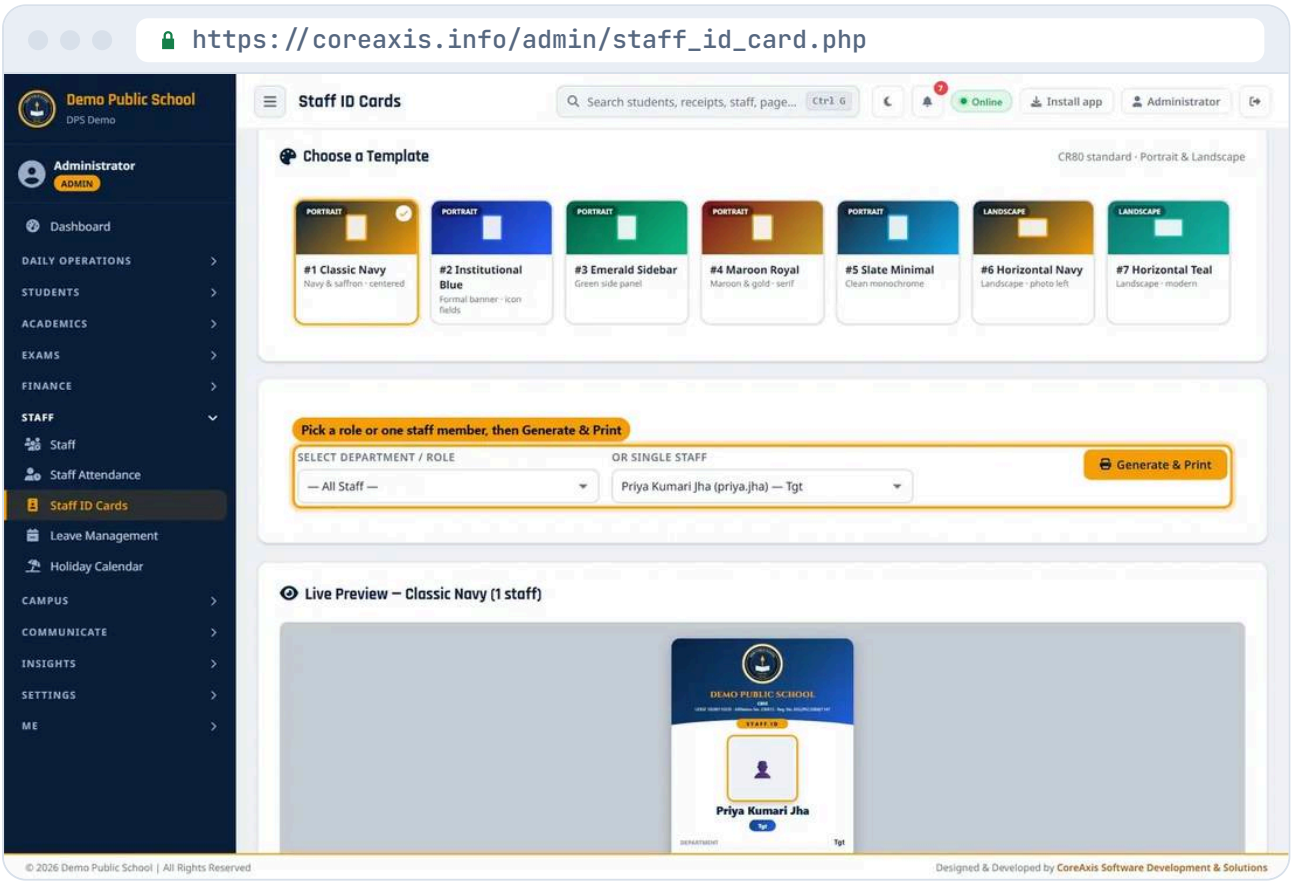
1 Open **Staff › Staff ID Cards**.



Choose a Template: five portrait and two landscape designs.

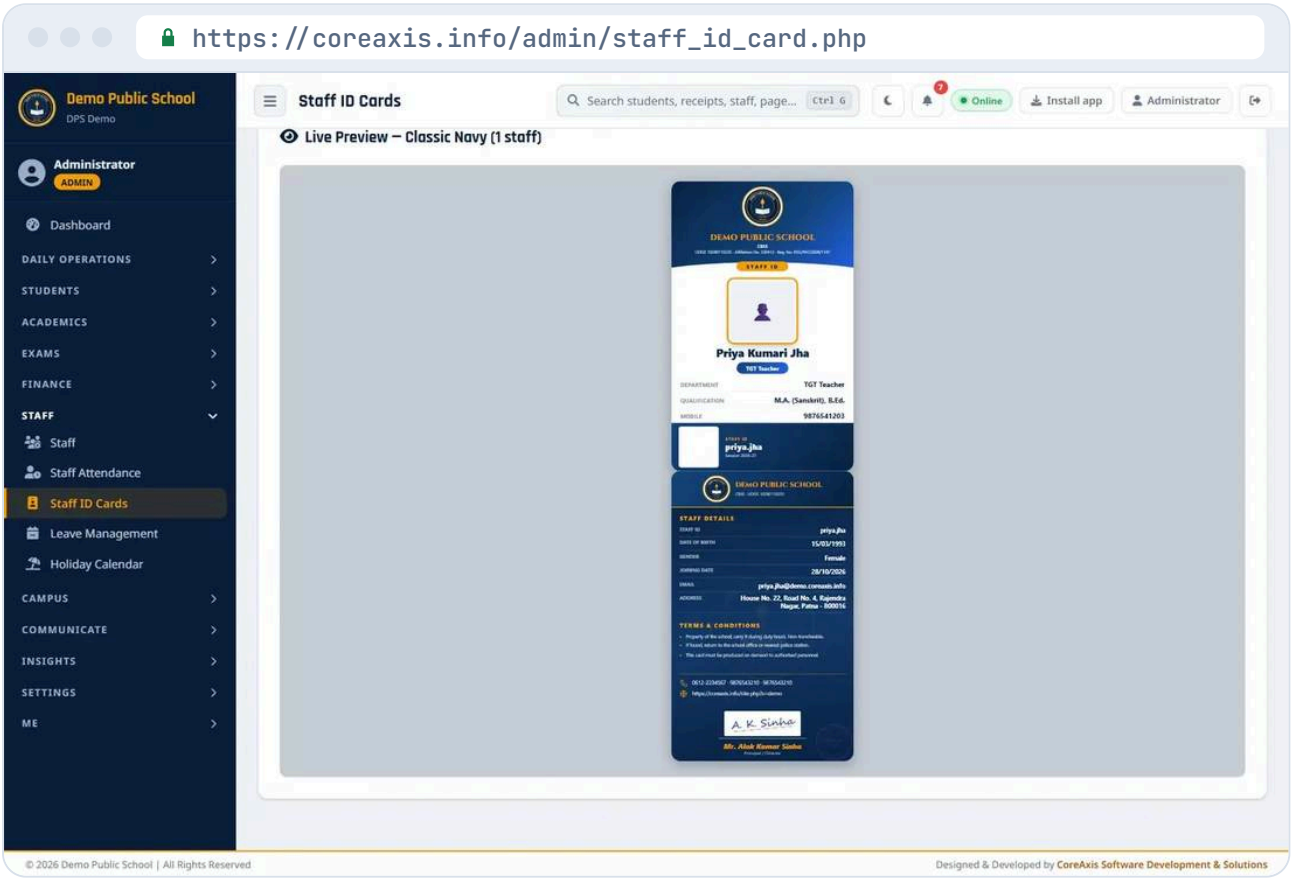
2 Under **Choose a Template**, click a design, for example **#1 Classic Navy**. The ticked card is the one in use.

3 In **OR SINGLE STAFF**, choose **Priya Kumari Jha (priya.jha)**. Leave **SELECT DEPARTMENT / ROLE** at **— All Staff —**.



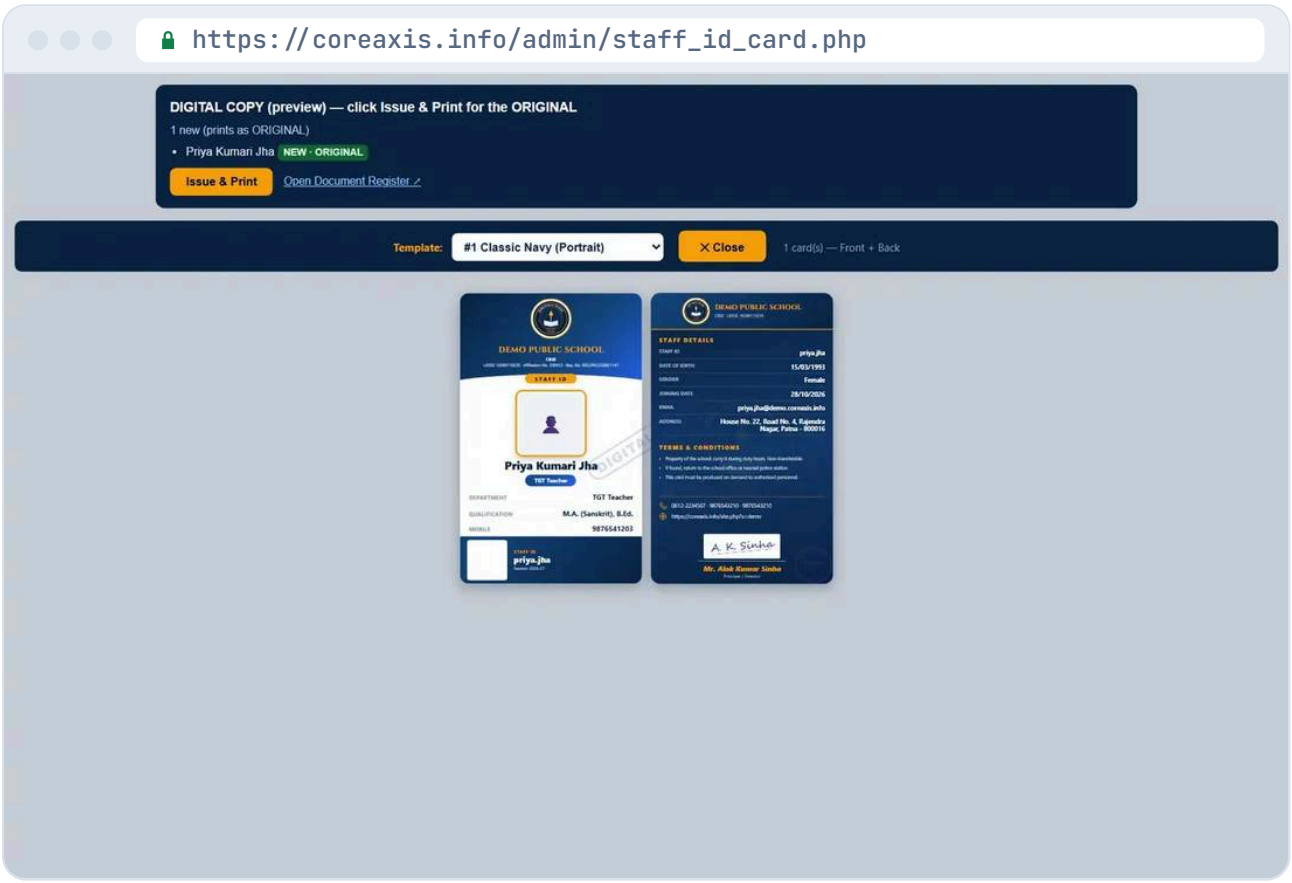
Pick one staff member, then Generate & Print.

4 Scroll down to **Live Preview** to check the front and back.



Live Preview: front and back of the card. Department shows the role name, TGT Teacher.

5 Click **Generate & Print**. The print page opens in a new tab with a DIGITAL COPY (preview) banner.



Print page: the banner lists who prints as ORIGINAL.

6 Click **Issue & Print** on the banner to record the issue in the Document Register and print on card stock (CR80, 100% scale).

TIP A missing photo shows a grey person icon. Add the photo in **Staff › Staff** (Edit › Update Photo) and print again.

TIP The school name, logo, numbers, signature and terms on the back come from **Settings › School Profile**. Change them there, not here.

Print cards for a whole department (example: all TGT teachers)

1 In **SELECT DEPARTMENT / ROLE**, choose the role, for example **TGT Teacher**. Leave **OR SINGLE STAFF** empty.

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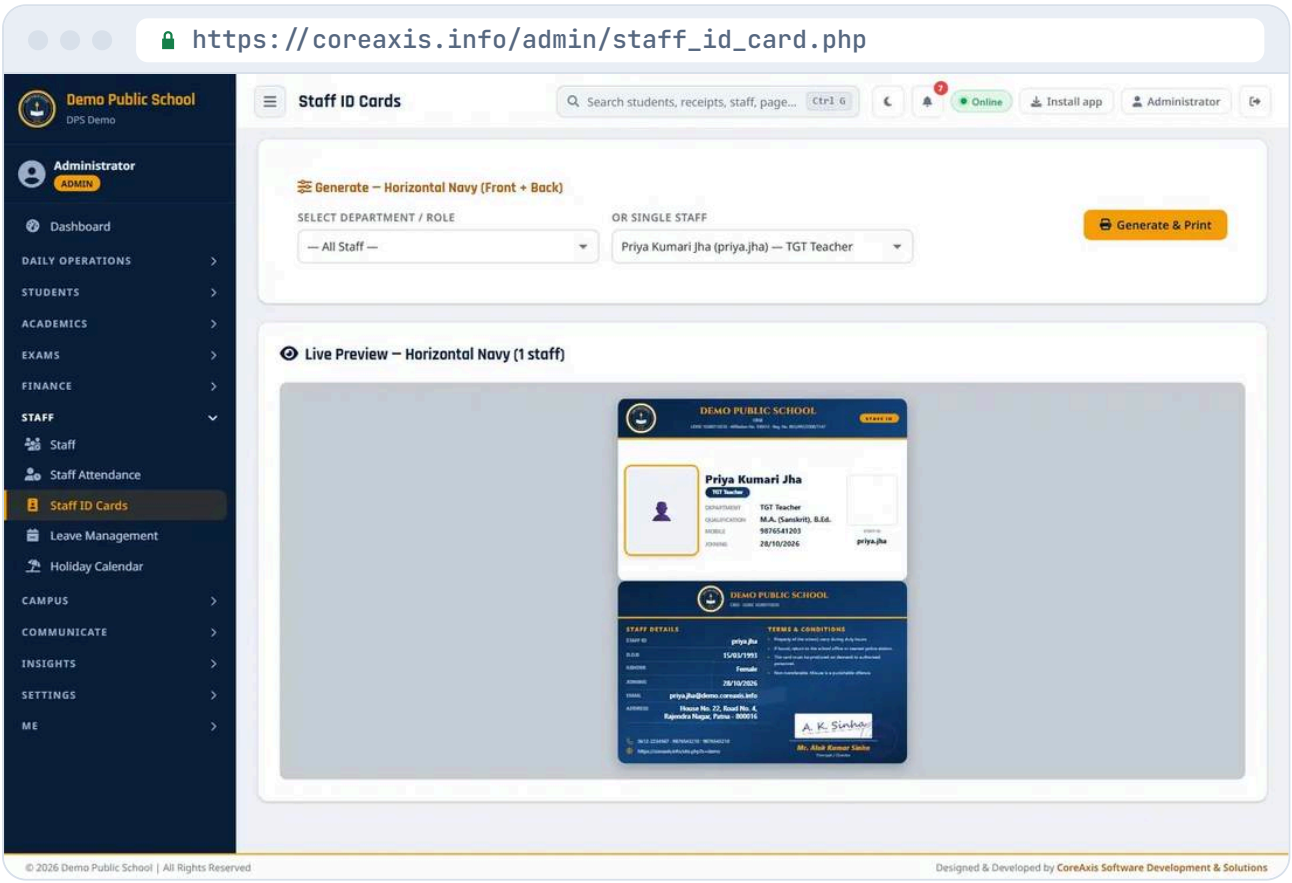
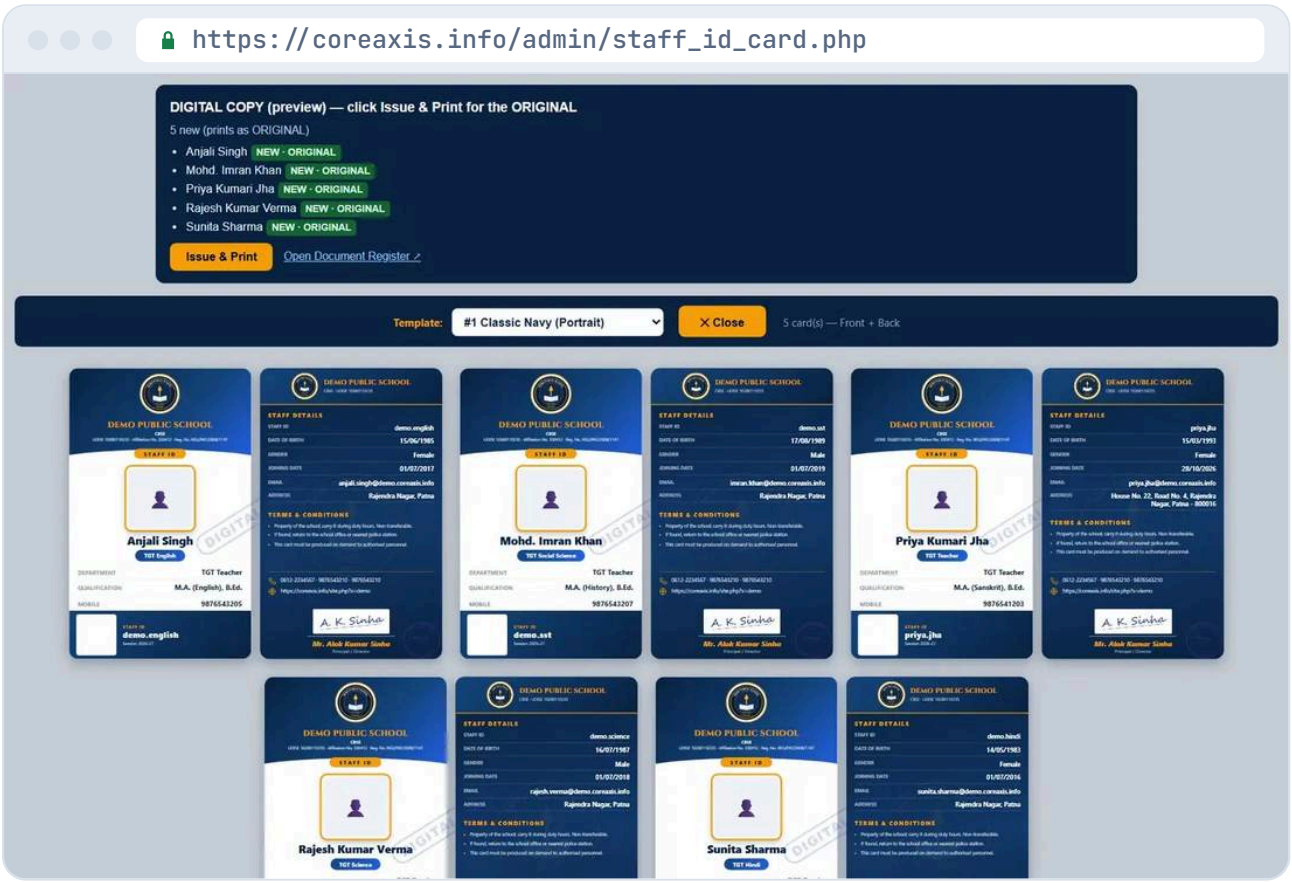
2 Pick a template. For a landscape card, choose **#6 Horizontal Navy** or **#7 Horizontal Teal**.



#6 Horizontal Navy preview.

3 Click **Generate & Print**. Every active staff member of that role is placed on the sheet, front then back.



Five TGT teachers on one print sheet.

4 Use the **Template** list at the top of the print page to switch the design without going back.

5 Click **Issue & Print**.

Screen at a glance

Choose a Template	#1 Classic Navy, #2 Institutional Blue, #3 Emerald Sidebar, #4 Maroon Royal, #5 Slate Minimal (portrait); #6 Horizontal Navy, #7 Horizontal Teal (landscape).
SELECT DEPARTMENT / ROLE	Prints every active staff member of that role.
OR SINGLE STAFF	Prints one person. Use one of the two boxes, not both.
Live Preview	Front and back of each card exactly as it will print.

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Print page banner	DIGITAL COPY (preview) until you click Issue & Print; NEW · ORIGINAL marks a first issue; reprints are marked DUPLICATE COPY. Open Document Register shows the issue history.

Questions

The card shows an old phone number.

Edit the staff member in Staff › Staff, save, and print the card again. A reprint is marked as a duplicate copy in the Document Register.

Can I print support staff such as drivers and guards?

Yes. Every active staff member, including No Login roles, can be printed.

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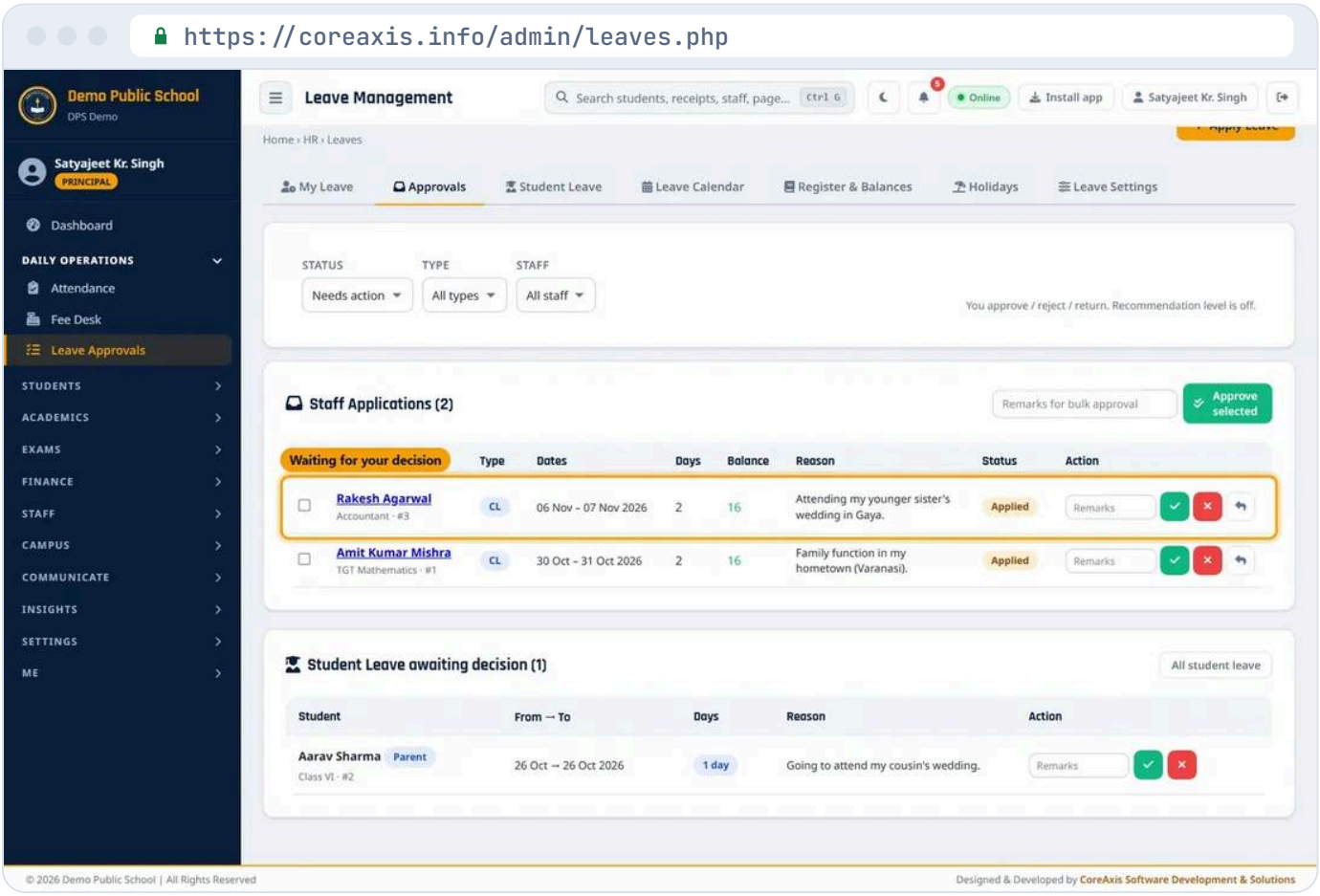
STAFF · CHAPTER 38

Leave Management

Admin Principal Teacher Accountant

MENU Staff › Leave Management (Principal: Daily Operations › Leave Approvals; Teacher / Accountant: Me › My Leaves)

Every staff member applies for leave from their own **My Leave** tab and sees their balance for each leave type. The Principal (or Vice Principal / Admin) approves, rejects or returns each application; if the recommendation level is on, a Head Teacher / HOD recommends it first. Approved leave is shown in Staff Attendance, the Leave Calendar and the Register, cuts the balance, and prints as a sanction order on the school letterhead. The same screens also handle student leave sent by parents or class teachers.



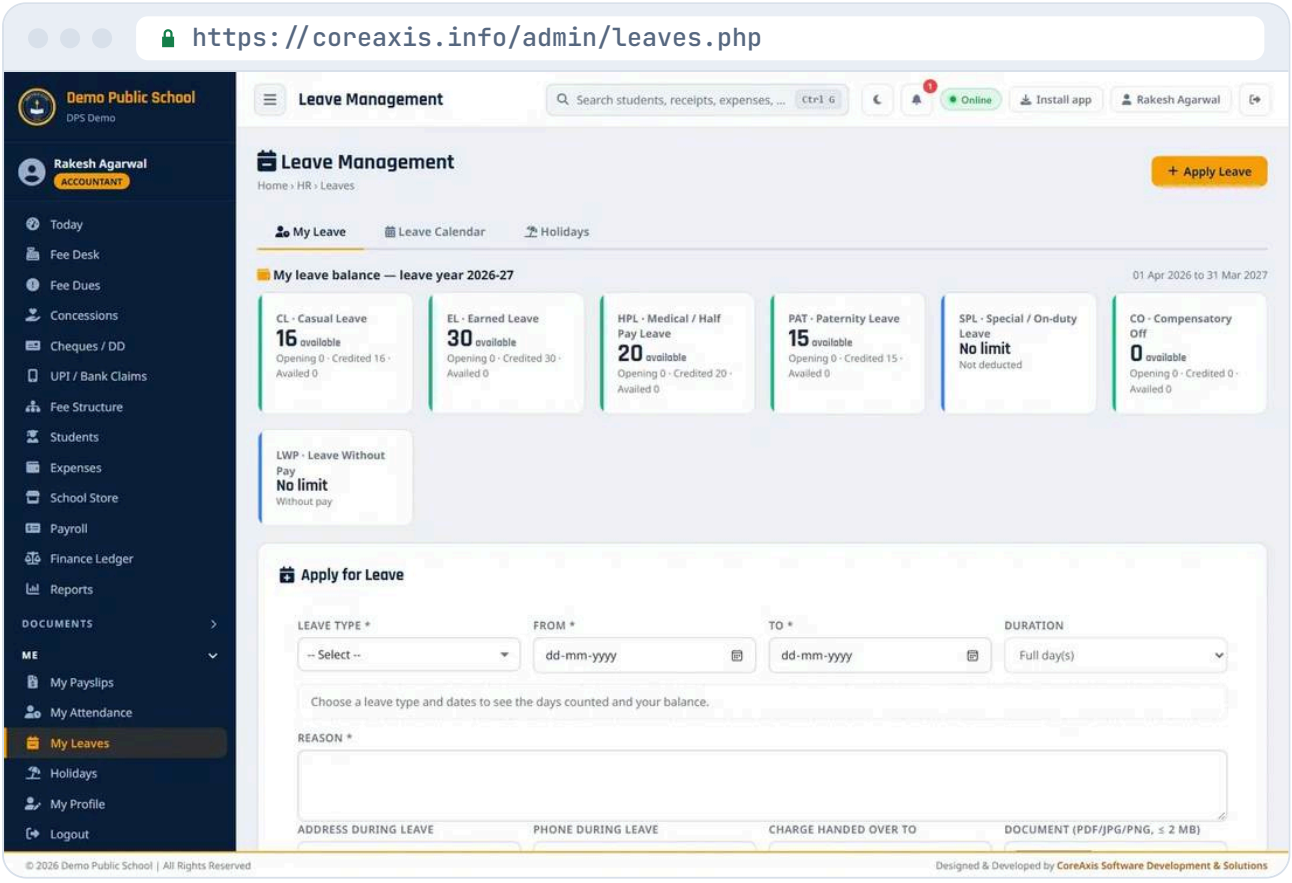
Leave Management — Demo Public School

Apply for leave as a staff member (example: Rakesh

Agarwal, accountant, CL on 6–7 November 2026)

Teachers and accountants open **Me › My Leaves**. Admin-level users open **Staff › Leave Management** and the **My Leave** tab.

1. Open **Me › My Leaves**. The top of the page shows **My leave balance** for the leave year (for example CL 16 available, EL 30, HPL 20).

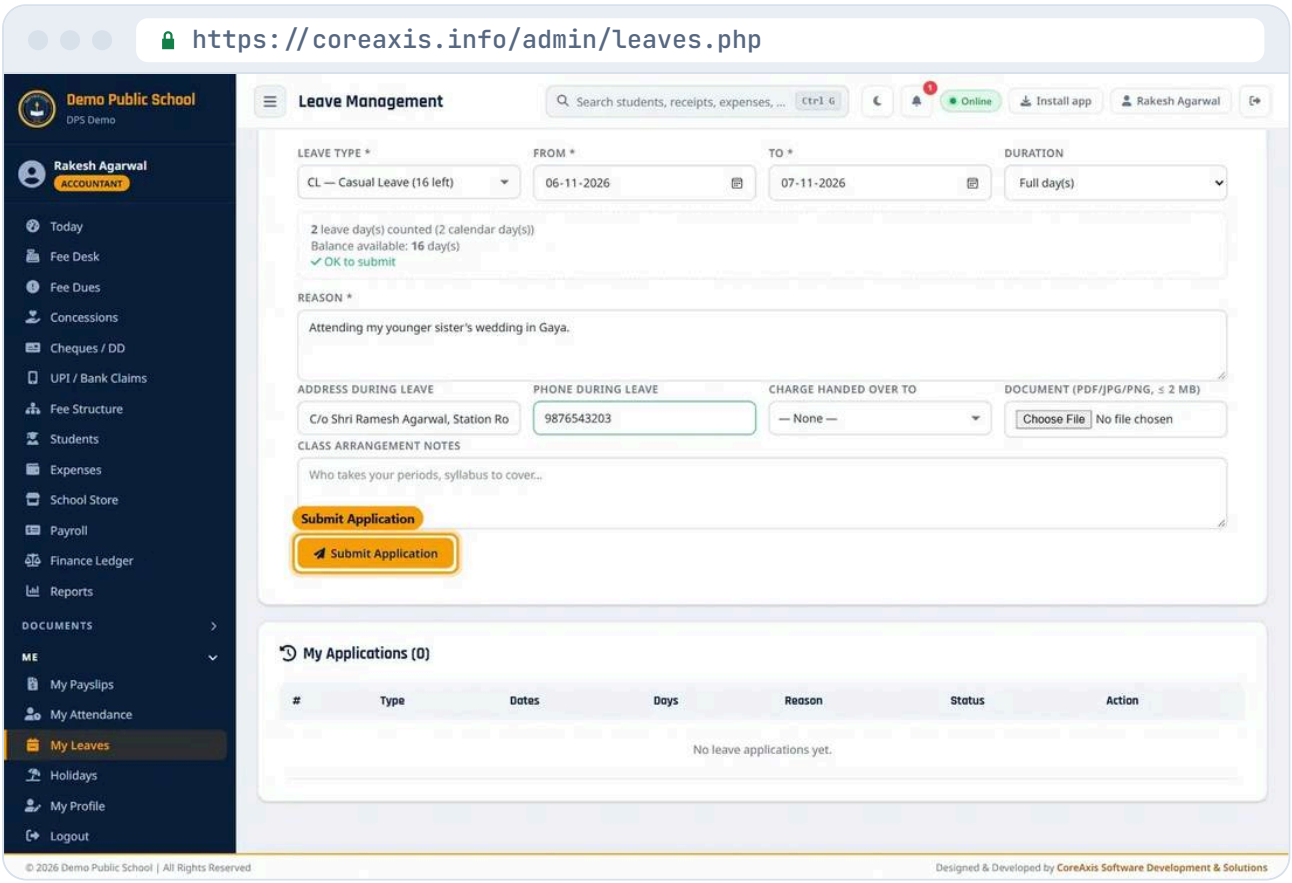


Balance cards for each leave type.

2. Under **Apply for Leave**, choose the **Leave Type**: **CL — Casual Leave (16 left)**.

3. Fill **From** (06-11-2026) and **To** (07-11-2026). Leave **Duration** at **Full day(s)**, or choose **First half** / **Second half** for a half day.

4 Read the grey box: it shows the days counted (2 leave days), your balance (16) and **OK to submit**. If a rule is broken, it says why here.

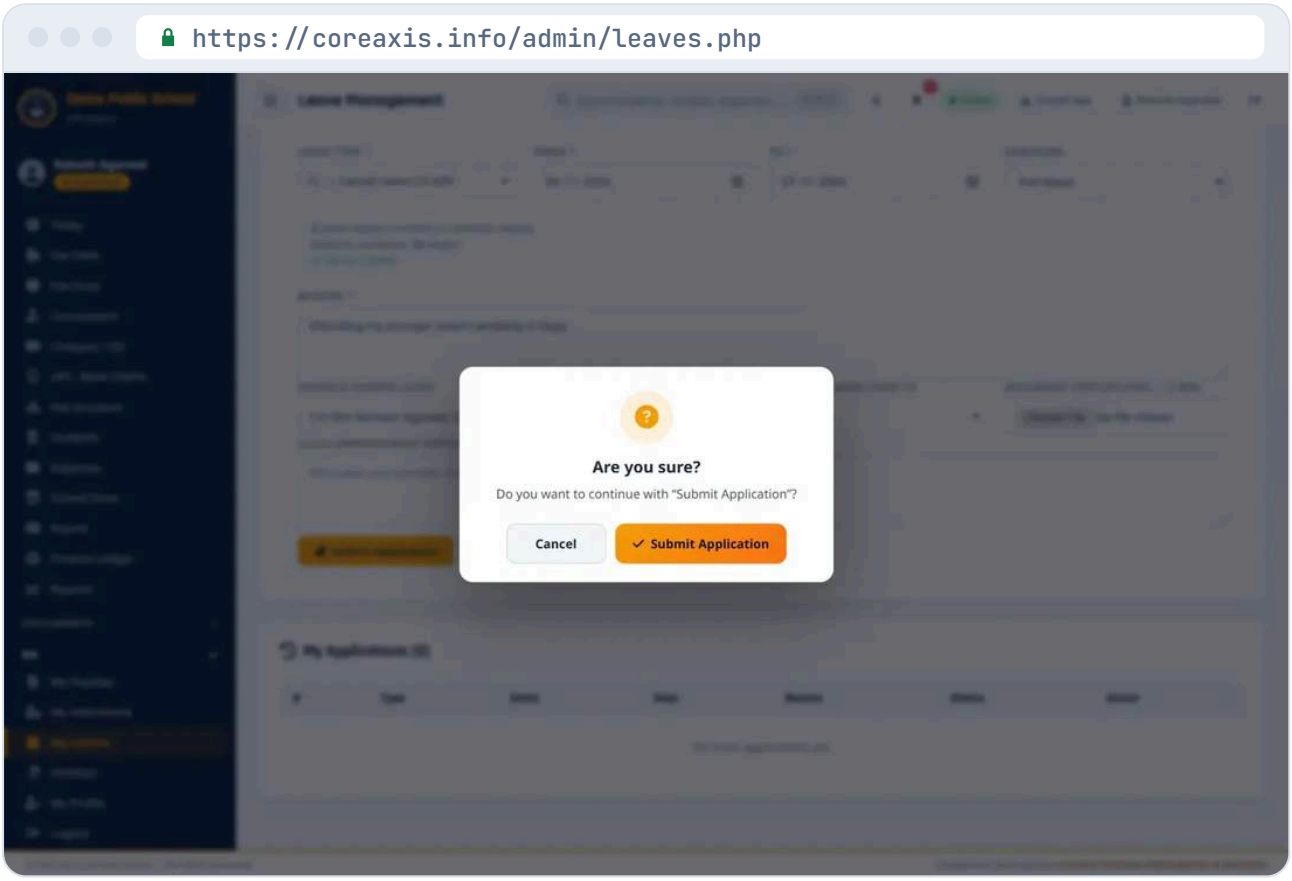


Filled form: days counted, balance check, Submit Application.

5 Type the **Reason** (Attending my younger sister's wedding in Gaya.). Add **Address during leave** and **Phone during leave**.

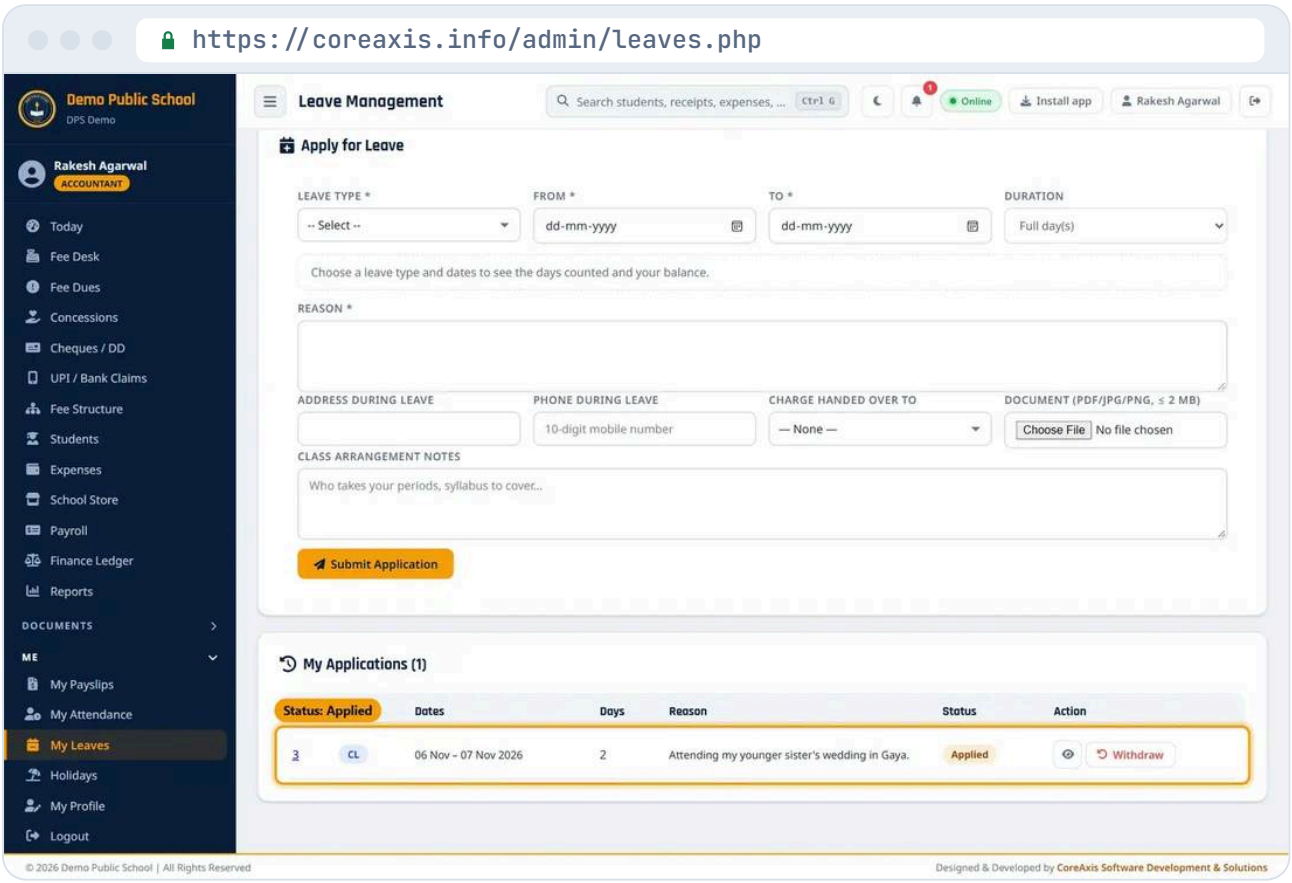
6 Teachers: choose **Charge handed over to** and write **Class arrangement notes** (who takes your periods). Attach a **Document** (PDF/JPG/PNG, up to 2 MB) if the leave type needs one, for example a medical certificate.

7 Click **Submit Application** and confirm in the popup.



Confirm popup.

8 The message **Leave application submitted (2 days)** appears. The application is listed under **My Applications** with the status **Applied**.



My Applications: status Applied, with Withdraw.

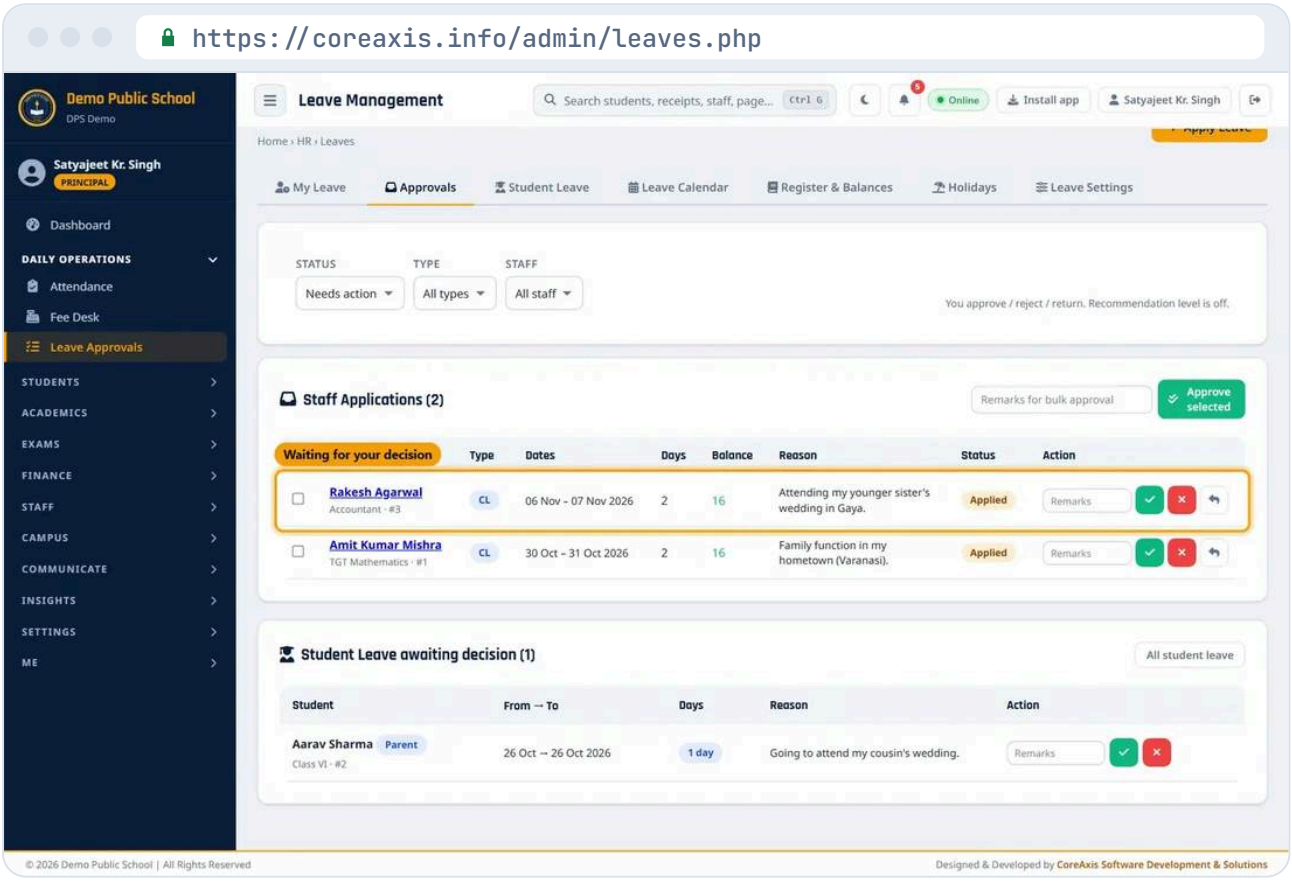
TIP Click **Withdraw** to take back an application that is still waiting.

TIP After an approved leave, use **Joining report** in My Applications to record the day you resumed duty. An early return gives the unused days back.

TIP To cancel an approved leave (all or some days), use the cancel request in My Applications. The approver must accept it.

Approve, reject or return a leave as Principal

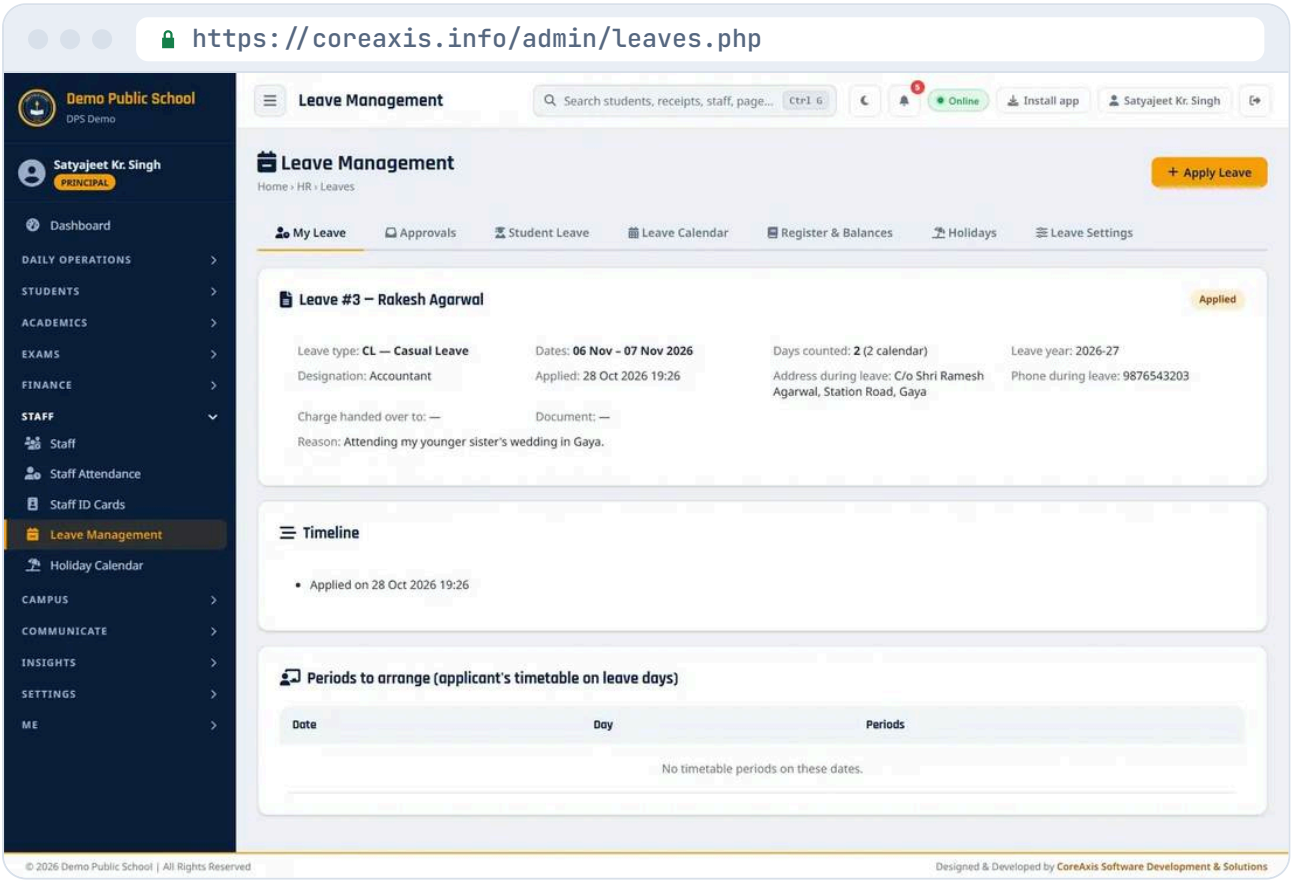
1. Sign in as the Principal and open **Daily Operations › Leave Approvals** (or **Staff › Leave Management › Approvals**). **Needs action** shows every application waiting for you.



Staff Applications waiting for a decision, with balance.

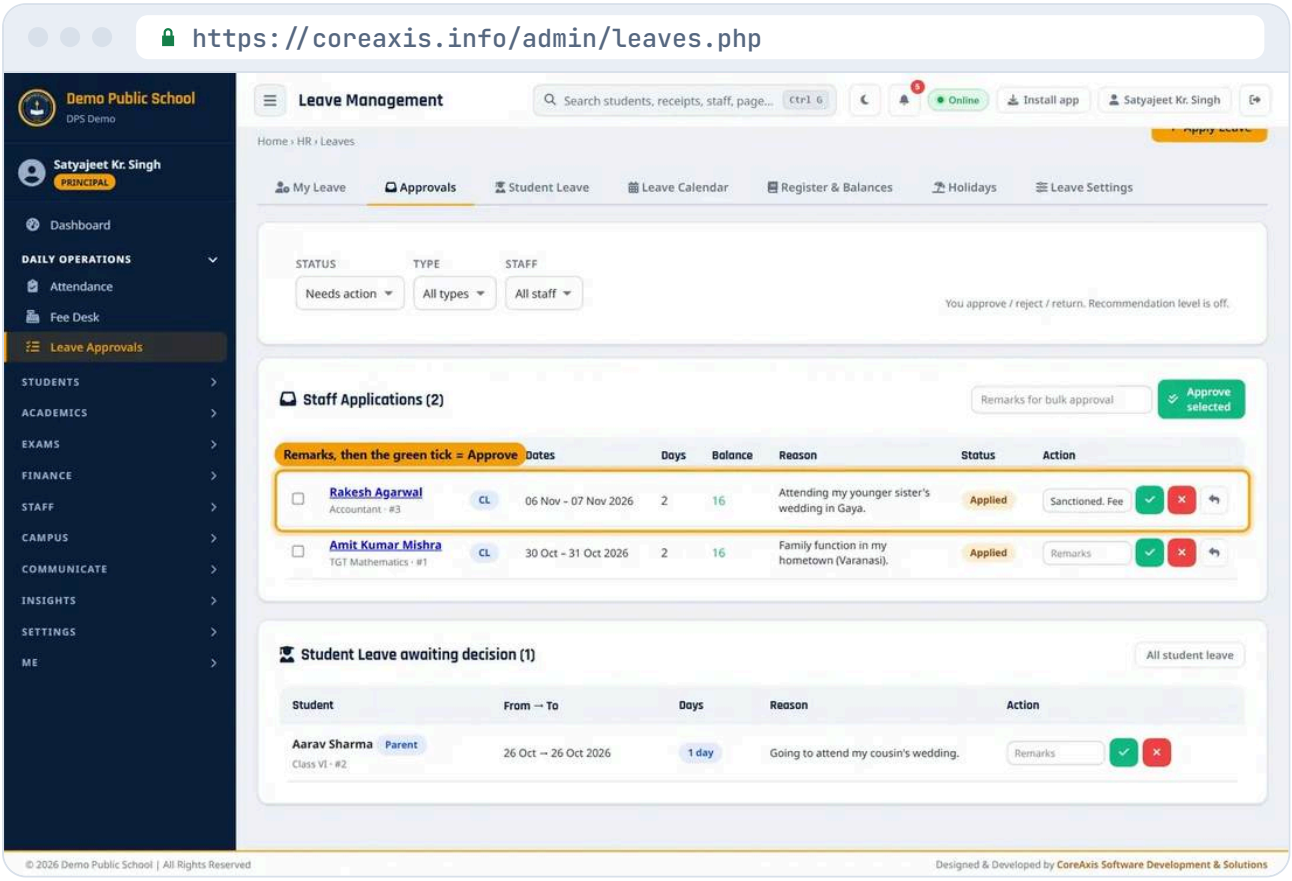
2. Check the **Type**, **Dates**, **Days** and **Balance** columns. Balance in green means enough days are left; red means not enough.

3 Click the applicant's name to see the full application: address, phone, charge handed over, document, timeline and the timetable periods that need a substitute.



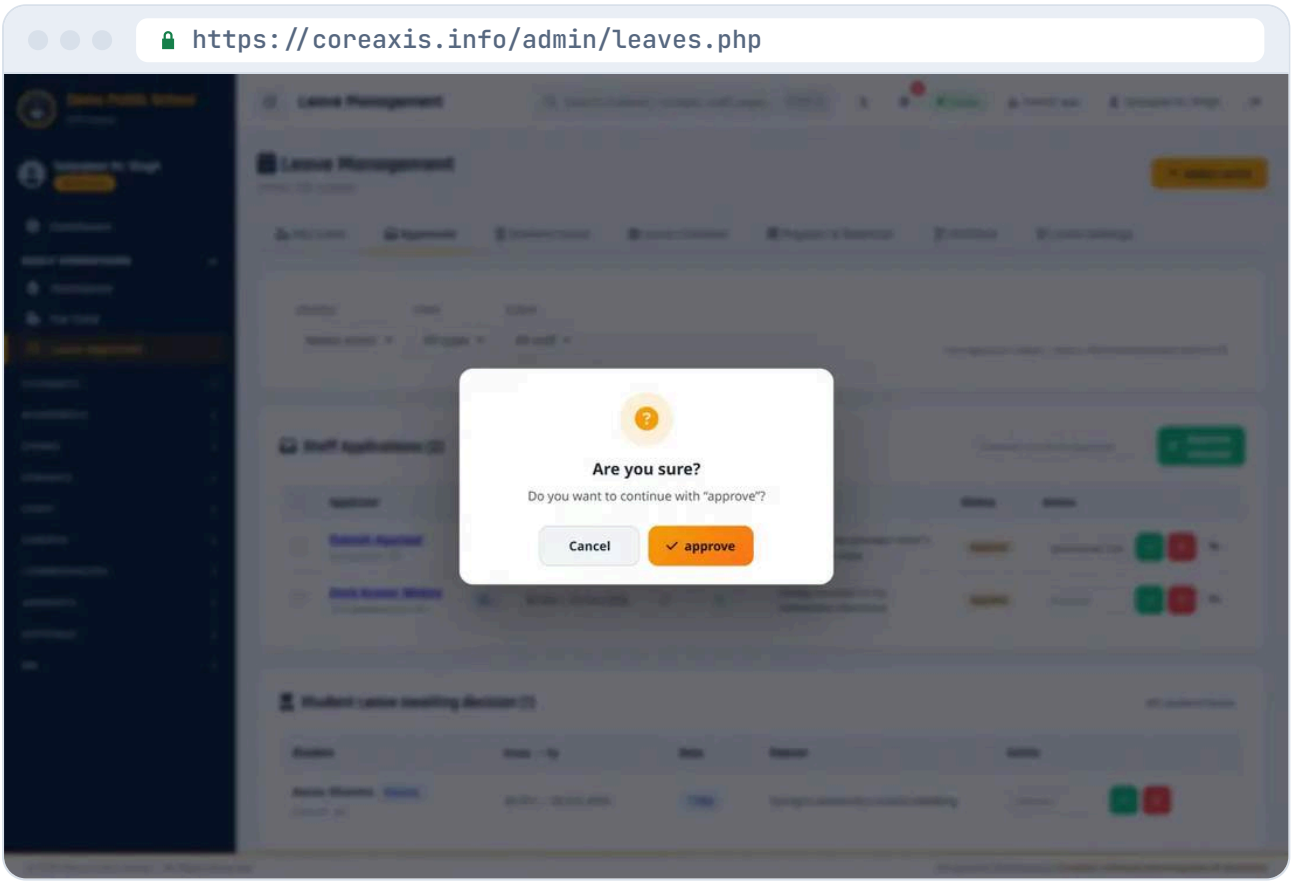
One application in full, with the periods to arrange.

4 Back in the list, type **Remarks** (Sanctioned. Fee desk cover by office staff.).



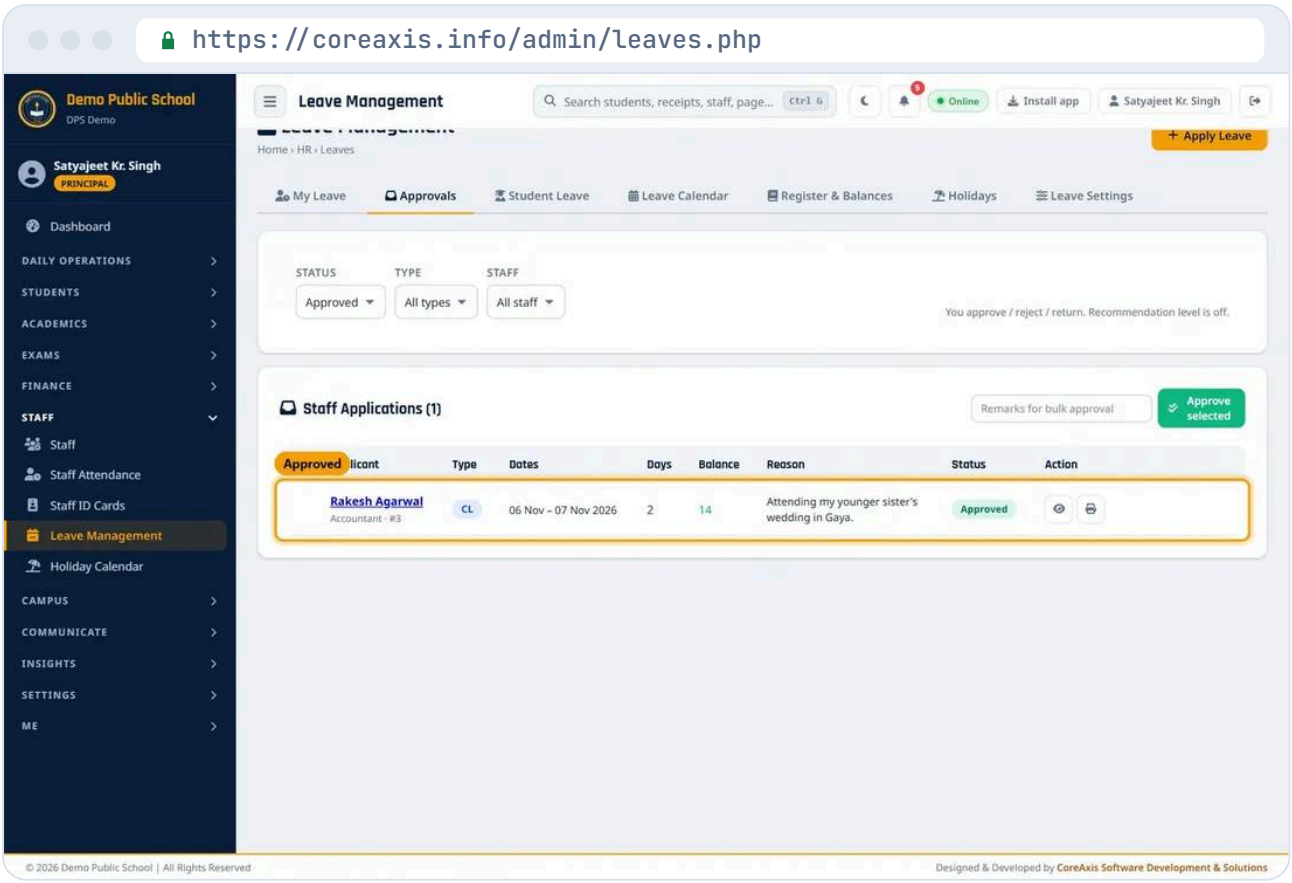
Remarks box and the action buttons.

5 Click the green tick (**Approve**), the red cross (**Reject**) or the return arrow (**Return for correction**), and confirm.



Confirm the approval.

6 The message **Leave approved.** appears. Change **Status** to **Approved** to see it with a print button.



Approved list with View and Sanction order.

7 Click the print icon (**Sanction order**) to print the leave sanction order on the school letterhead.

Leave Sanction Order with order number and balance after the leave.

TIP To approve many applications at once, tick them, type one remark in **Remarks for bulk approval** and click **Approve selected**.

TIP **Return** sends the application back to the staff member to correct and resubmit; write what to change in Remarks.

TIP The applicant gets a notice of every decision (and an SMS if Leave alerts are on in SMS settings).

Recommendation level (HOD recommends, Principal approves)

When **Recommendation level** is ticked in **Leave Settings**, staff applications first go to the chosen recommenders (for example a Head Teacher / HOD). The recommender sees an **Approvals** tab with a **Recommend** button and a **Return** button. After it is recommended, the status becomes **Recommended** and the Principal approves or rejects as above. In the demo school the recommendation level is off, so the screen says: You approve / reject / return. Recommendation level is off.

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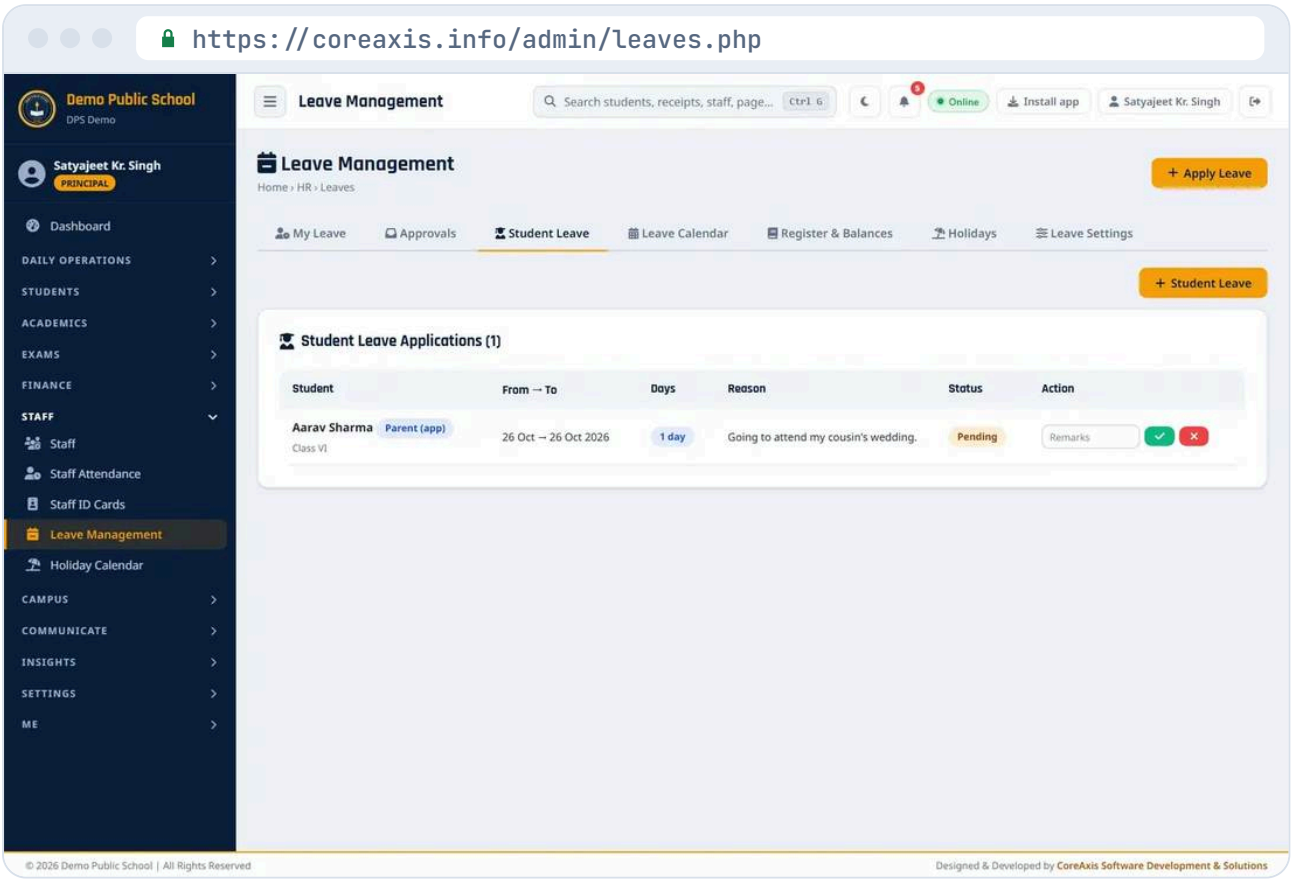
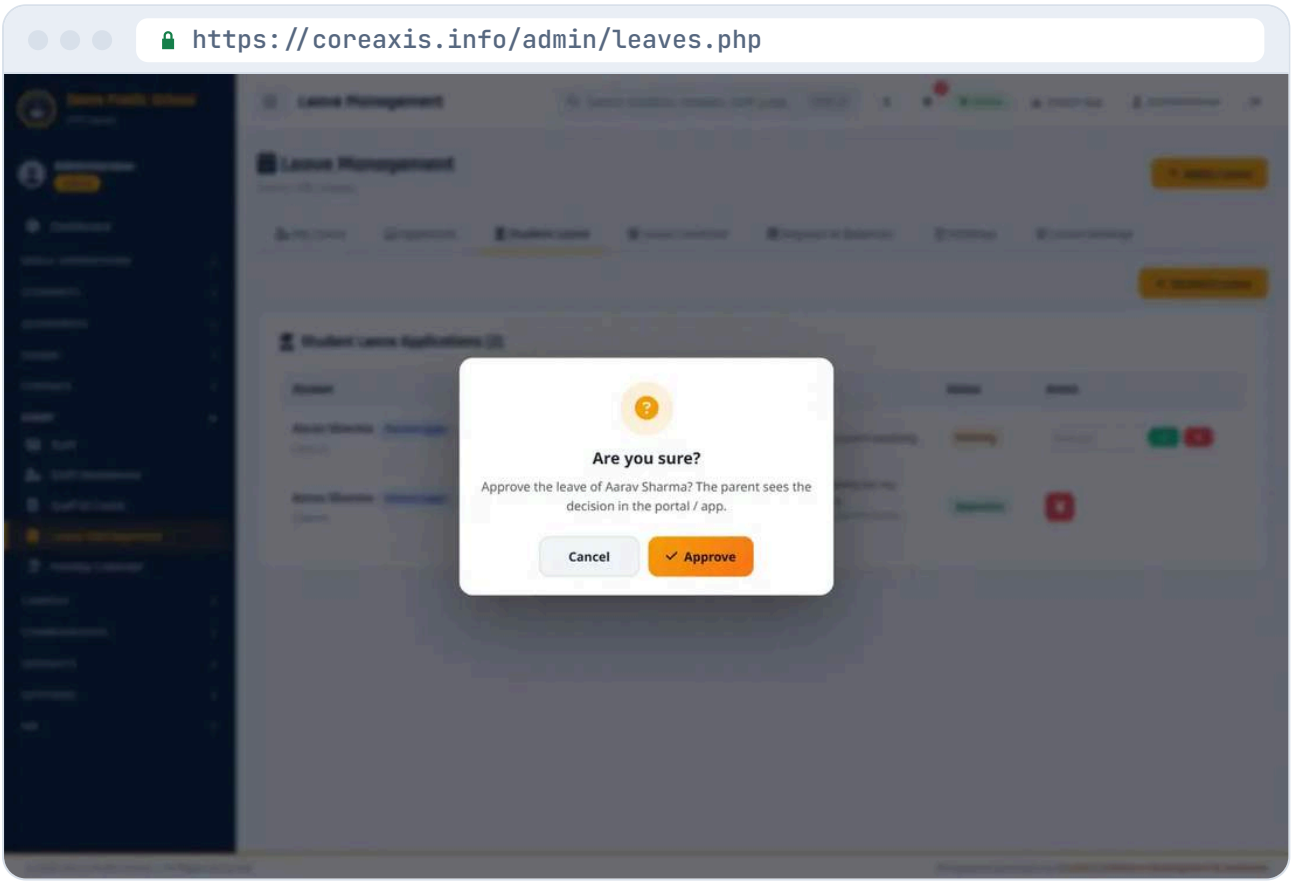
Student leave

1. Open the **Student Leave** tab. Parents apply from the student portal (marked **Parent**); class teachers and the office can click **+ Student Leave** to file one.



Student Leave Applications with Pending status.

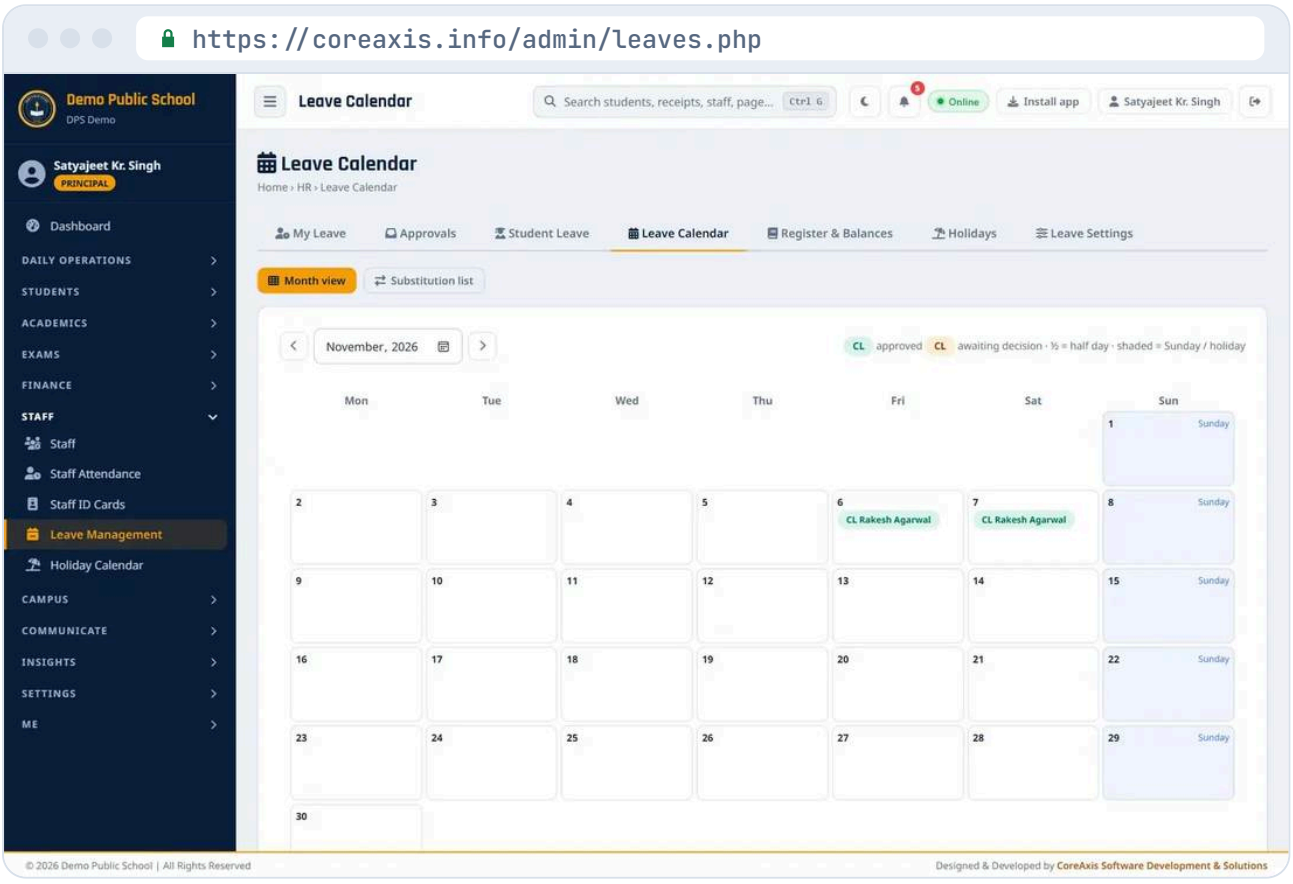
2 Type a remark and click the green tick to approve or the red cross to reject. The popup names the student, for example "Approve the leave of Aarav Sharma? The parent sees the decision in the portal / app." Click **Approve** or **Reject**. The class teacher of the student's class or the Principal can decide. The parent is told the decision.



Approve popup for Aarav Sharma's leave.

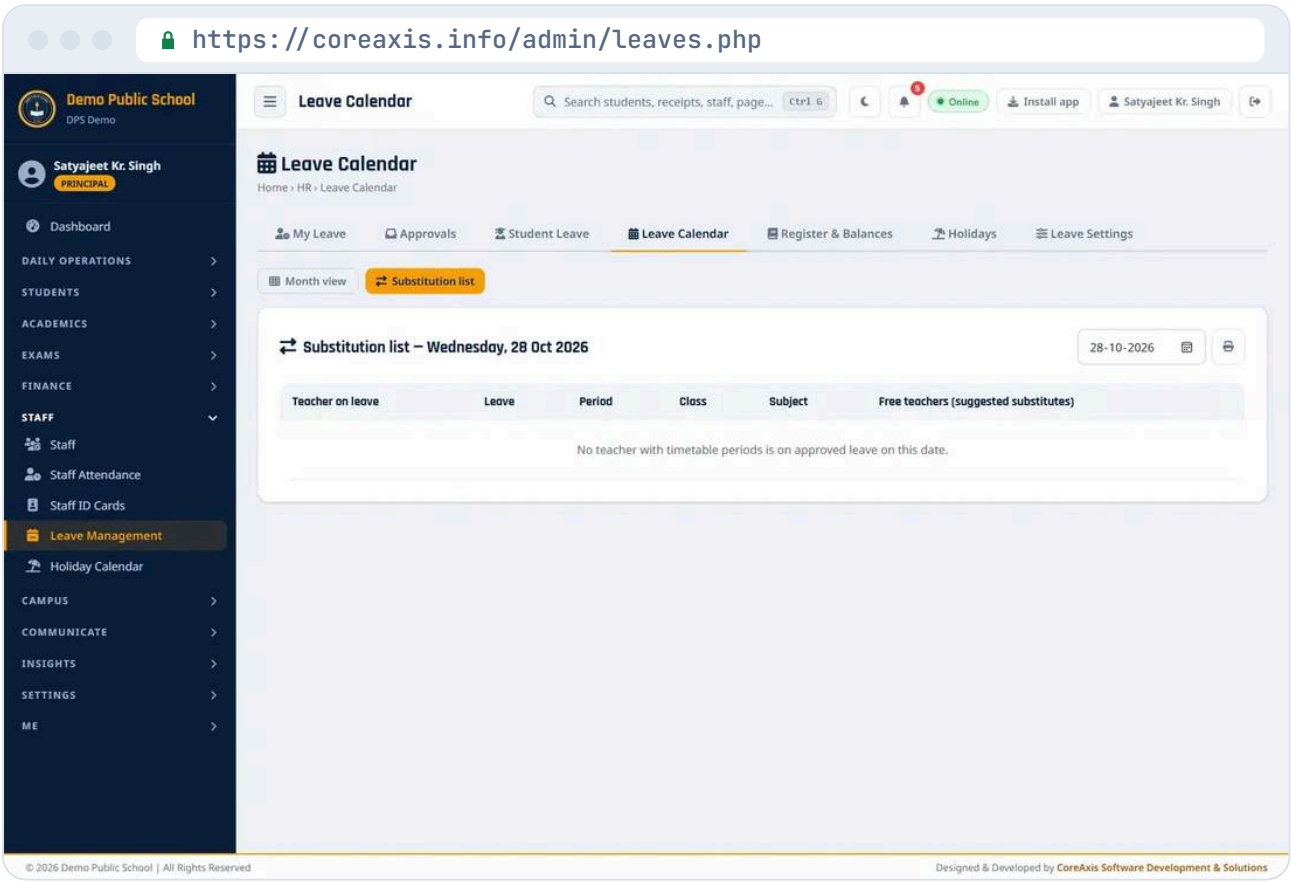
Leave Calendar and substitution list

1 Open the **Leave Calendar** tab and pick the month (November 2026). Green chips are approved leave; amber chips are awaiting a decision.



Month view: Rakesh Agarwal on CL on 6 and 7 November.

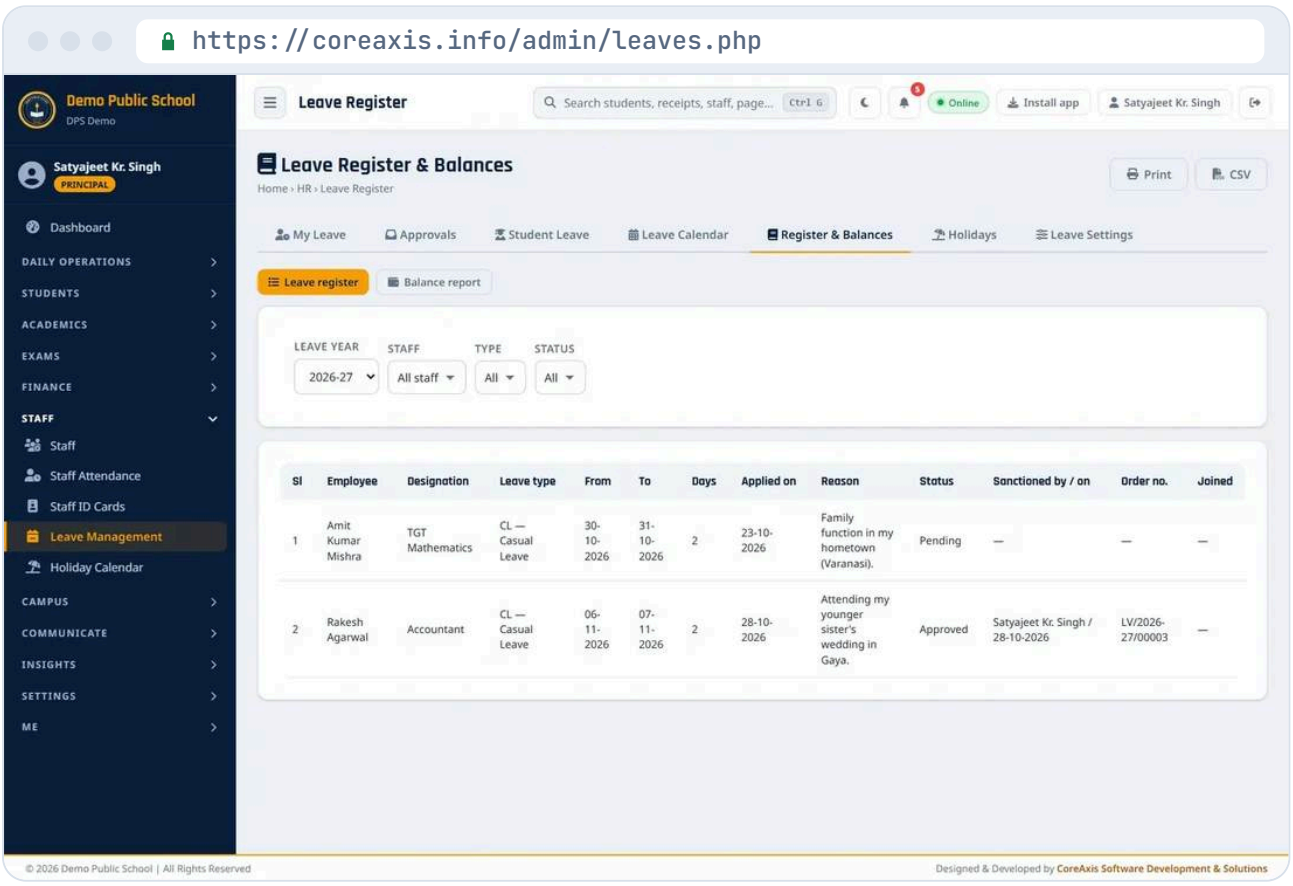
2 Click **Substitution list** and choose a date to see teachers on leave, their periods and suggested free teachers. Click the printer icon to print it for the staff room.



Substitution list for one day.

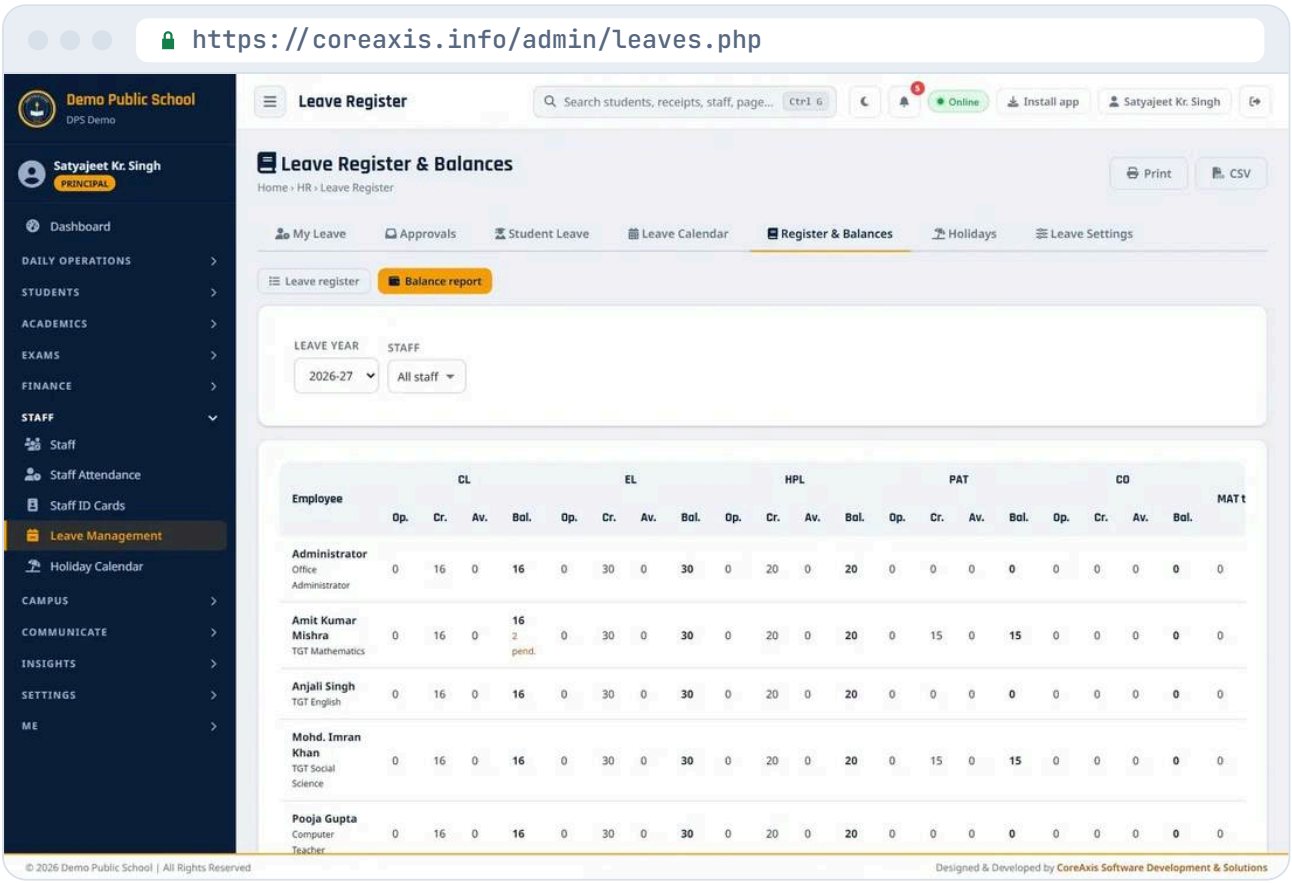
Leave Register and balance report (Admin / Principal)

1. Open **Register & Balances**. Filter by **Leave year**, **Staff**, **Type** and **Status**.



Leave register: one line per application with order number.

2 Click **Balance report** to see, for each staff member and leave type, the opening, credited, availed and balance days.

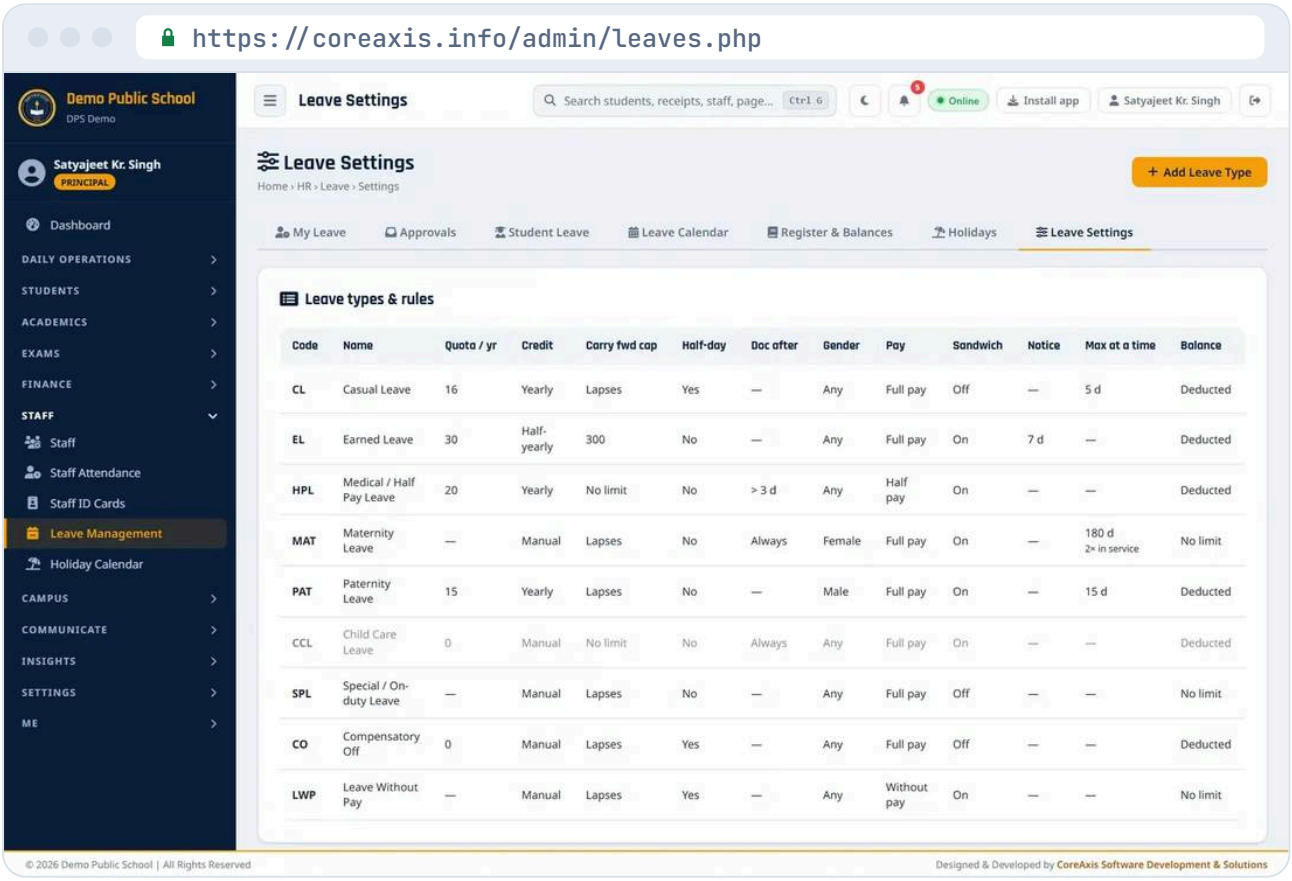


Balance report.

3 Click **Print** for a paper register or **CSV** to open it in Excel.

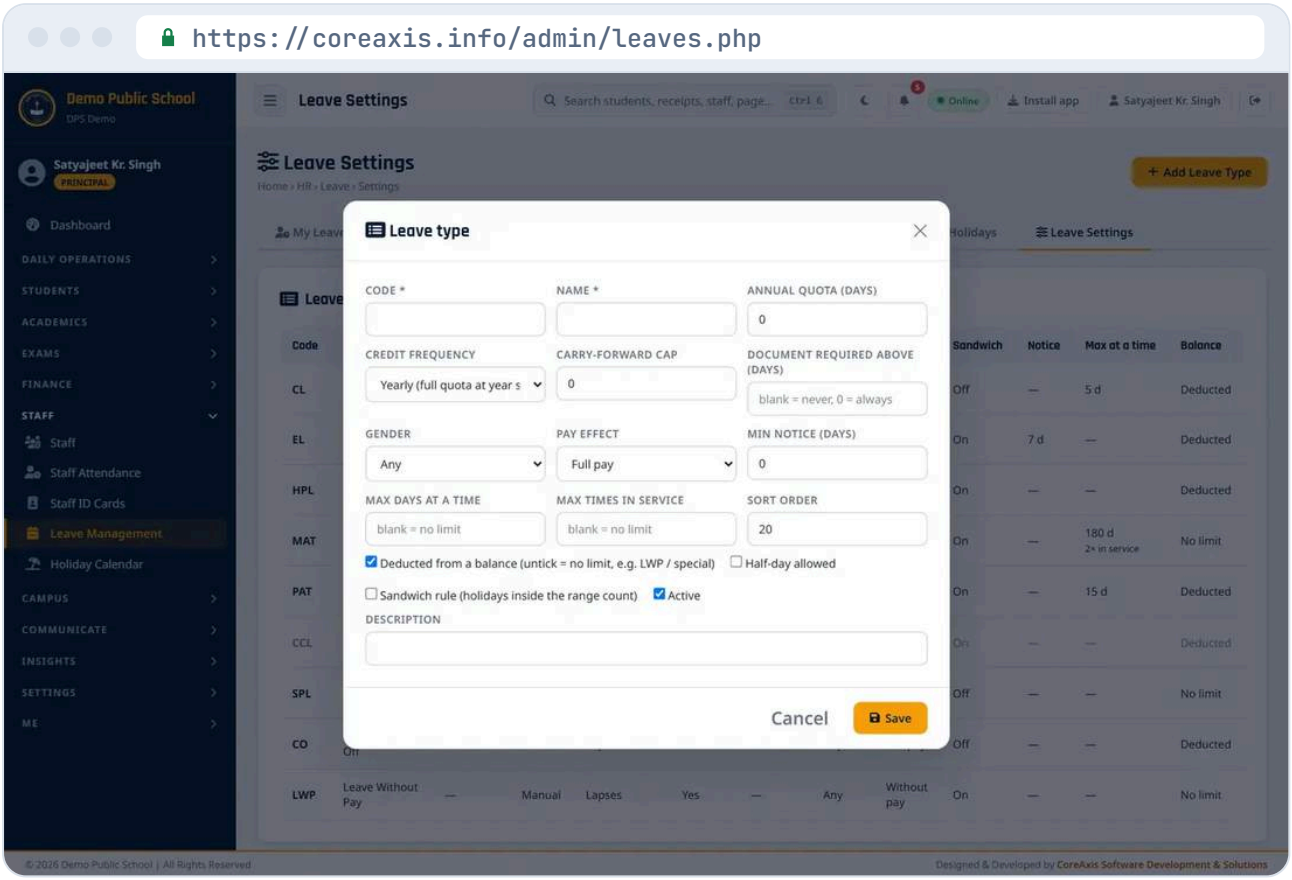
Leave Settings: types, rules, leave year and balances (Admin / Principal)

1 Open **Leave Settings**. The table **Leave types & rules** lists every type with its quota, credit pattern, carry-forward cap, half-day, document rule, gender, pay effect, sandwich rule, notice days and maximum at a time.



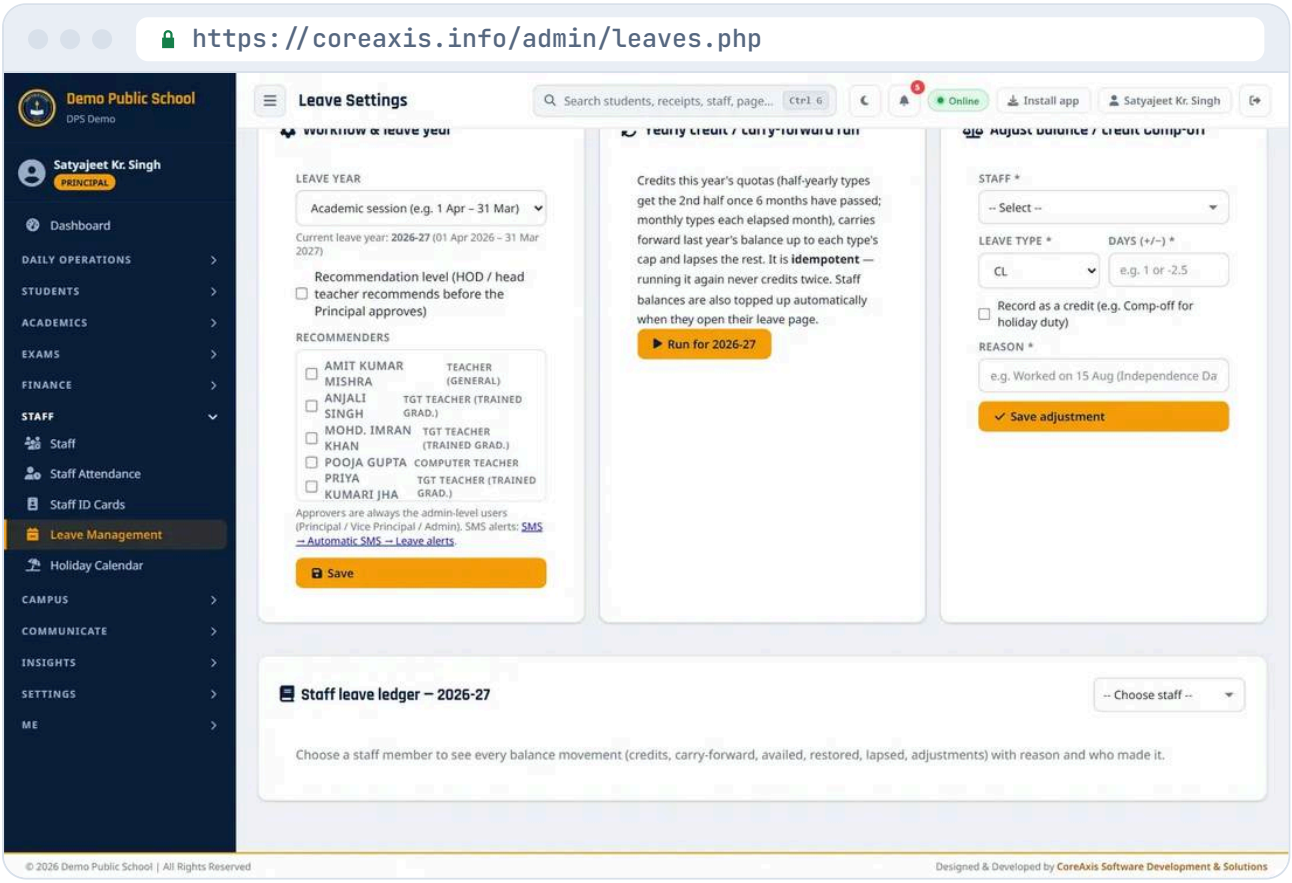
Leave types & rules.

2 Click **Add Leave Type** (or the pencil on a row) to set a type's rules, then **Save**.



Leave type form.

3 Under **Workflow & leave year**, choose the **Leave year** (academic session or calendar year), turn the **Recommendation level** on or off, tick the **Recommenders** and click **Save**.



Workflow & leave year, yearly credit run and balance adjustment.

4 At the start of a leave year, click **Run for 2026-27** under **Yearly credit / carry-forward run**. It credits quotas and carries forward balances; running it again never credits twice.

5 To give a Comp-off for holiday duty or correct a balance, use **Adjust balance / credit Comp-off**: choose **Staff**, **Leave type**, **Days**, tick **Record as a credit** if needed, write the **Reason** and click **Save adjustment**.

Leave types in the demo school

CL — Casual Leave	16 a year, credited yearly, lapses at year end, half-day allowed, at most 5 days at a time.
EL — Earned Leave	30 a year, credited half-yearly, carry forward up to 300, 7 days' notice, sandwich rule on.
HPL — Medical / Half Pay Leave	20 a year, half pay, document needed for more than 3 days.

MAT / PAT — Maternity / Paternity Leave	Maternity: women only, up to 180 days, twice in service, document always. Paternity: men only, 15 days.
CCL — Child Care Leave	Inactive in the demo school.
SPL — Special / On-duty Leave	No limit, not deducted (exam duty, training).
CO — Compensatory Off	Credited by the office for work on a holiday.
LWP — Leave Without Pay	No limit; deducted from salary.

Questions

The form says the leave cannot be submitted.

Read the grey check box under the dates. It names the rule, for example not enough balance, too many days at a time, or notice days not met. Choose another type (for example LWP) or change the dates.

Do Sundays inside my leave count?

Only for types with the Sandwich rule on (EL, HPL, MAT, PAT, LWP in the demo school). For CL, Sundays and holidays inside the dates are not counted.

Can the office apply on behalf of a teacher who is ill?

Yes. Admin-level users see an Applicant box on the Apply form; choose the teacher. Filing for someone else waives the notice rule.

Can an approved leave be deleted?

No. Approved staff leave changes balances and attendance, so it must be cancelled through a cancellation request instead.

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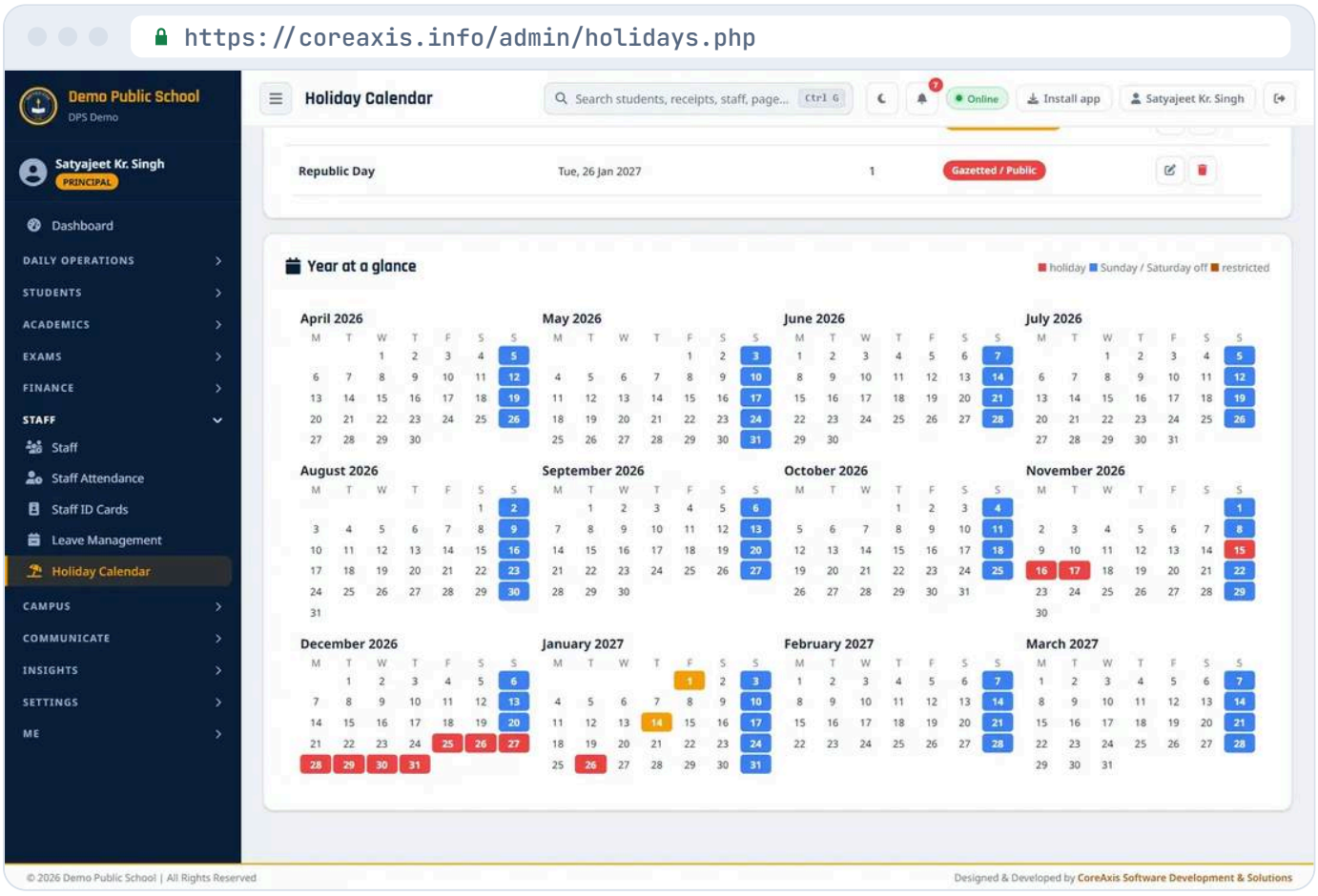
STAFF · CHAPTER 39

Holiday Calendar

Admin | Principal | Teacher | Accountant

MENU Staff › Holiday Calendar (Teacher / Accountant: Me › Holidays)

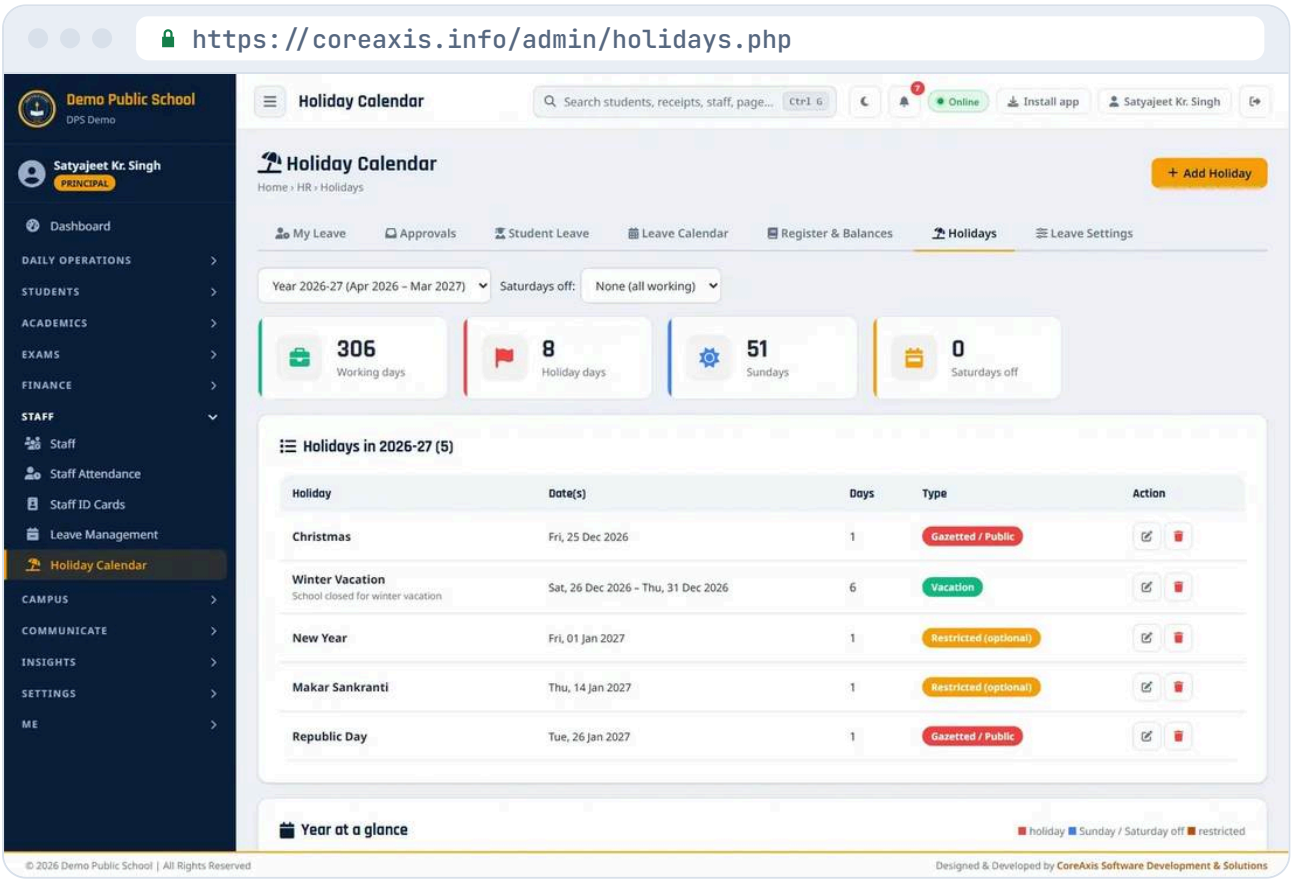
The Holiday Calendar lists the school's holidays for each academic year and shows the whole year at a glance. Leave Management uses it to decide which days count as leave, and the attendance registers shade these days. Admin and Principal add or edit holidays; teachers and accountants can only view the calendar.



Holiday Calendar — Demo Public School

Add a holiday (example: Chhath Puja, 15–17 November 2026)

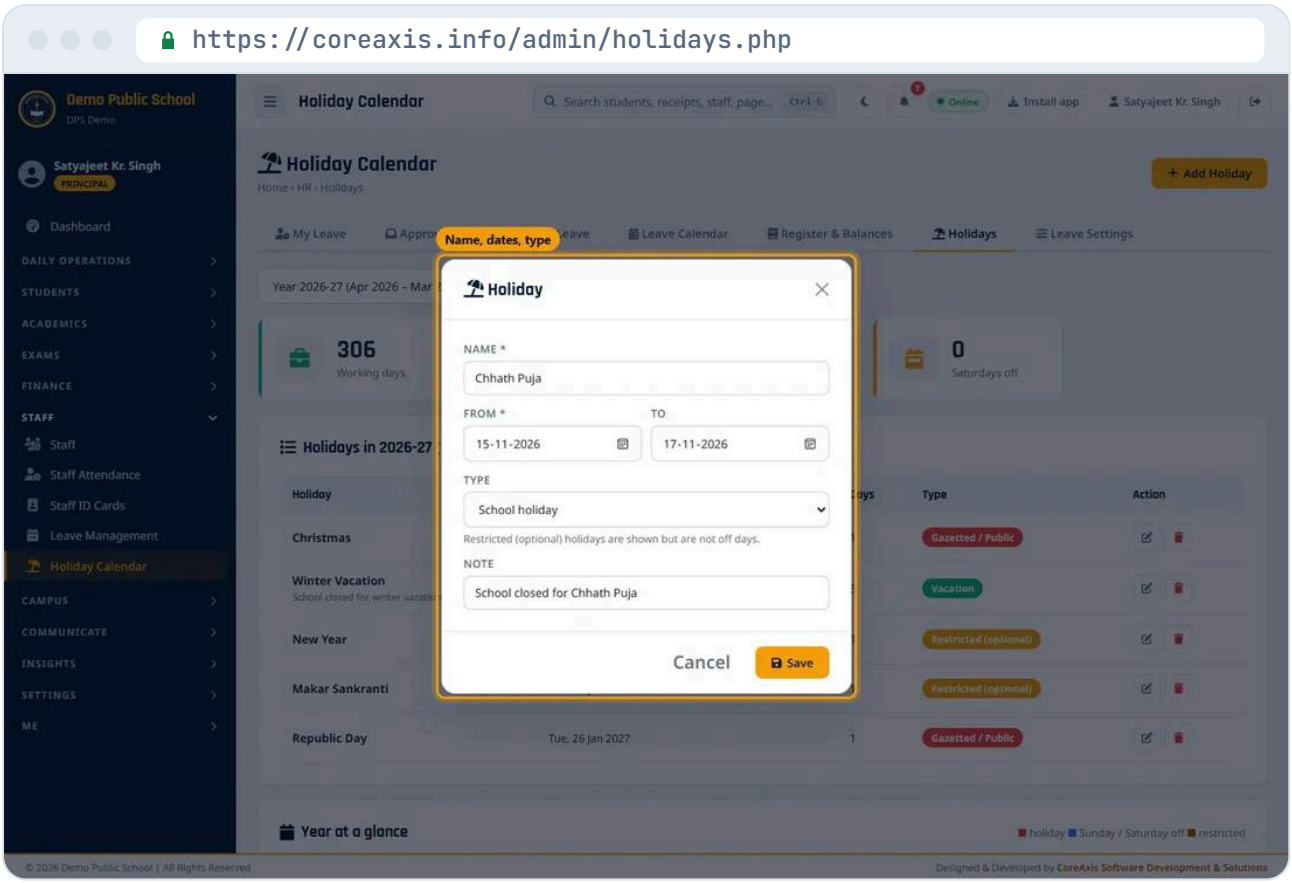
1. Open **Staff › Holiday Calendar**. Check that the year box shows **Year 2026-27 (Apr 2026 – Mar 2027)**.



Holiday Calendar with working-day counts.

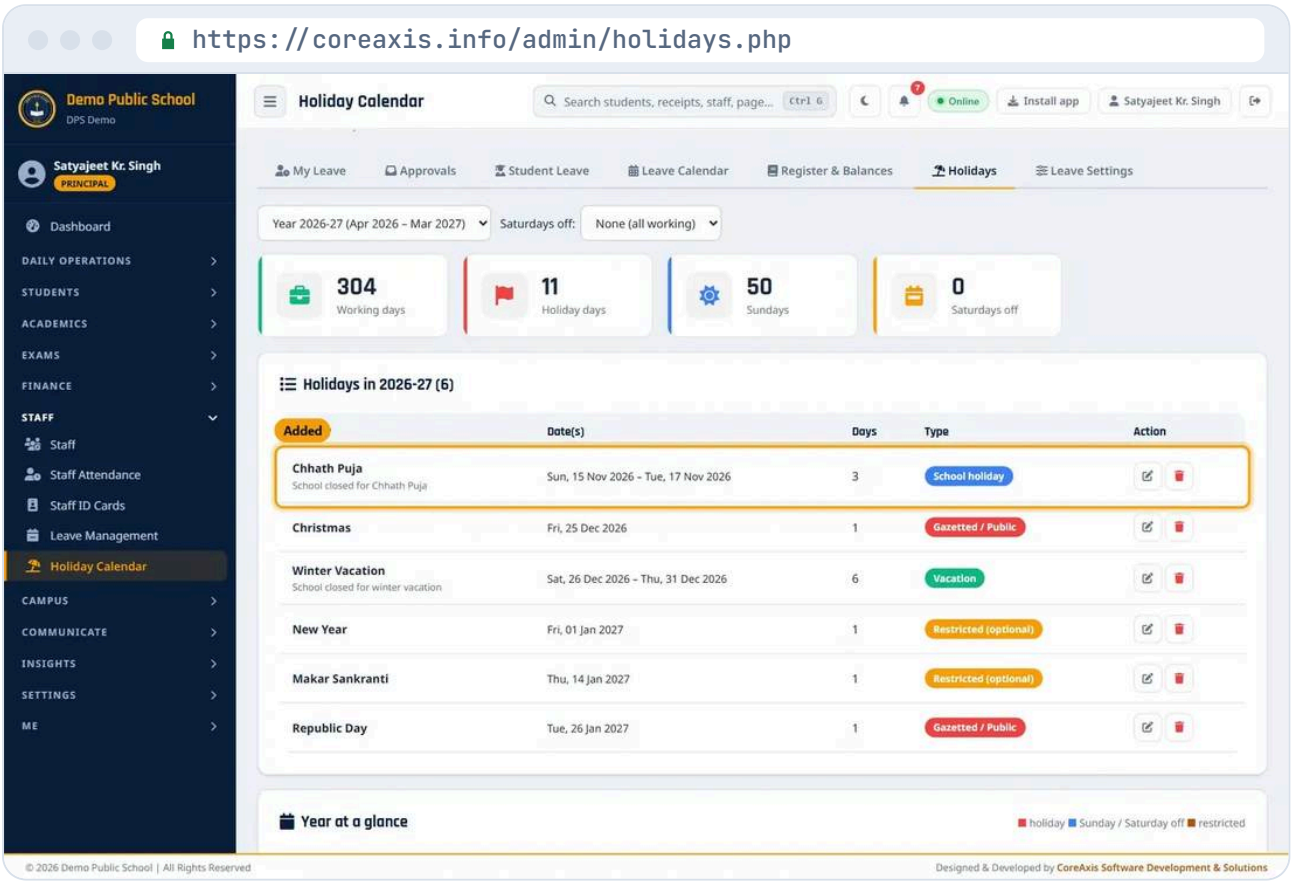
2. Click **Add Holiday**.
3. Type the **Name** (Chhath Puja).
4. Choose **From** (15-11-2026) and **To** (17-11-2026). For a one-day holiday, leave **To** empty.

5 Choose the **Type**: **School holiday**. Add a **Note** if you like (School closed for Chhath Puja).



Holiday form: name, dates, type, note.

6 Click **Save** and confirm. The message **Holiday saved.** appears and the holiday is added to the list with **3** days.



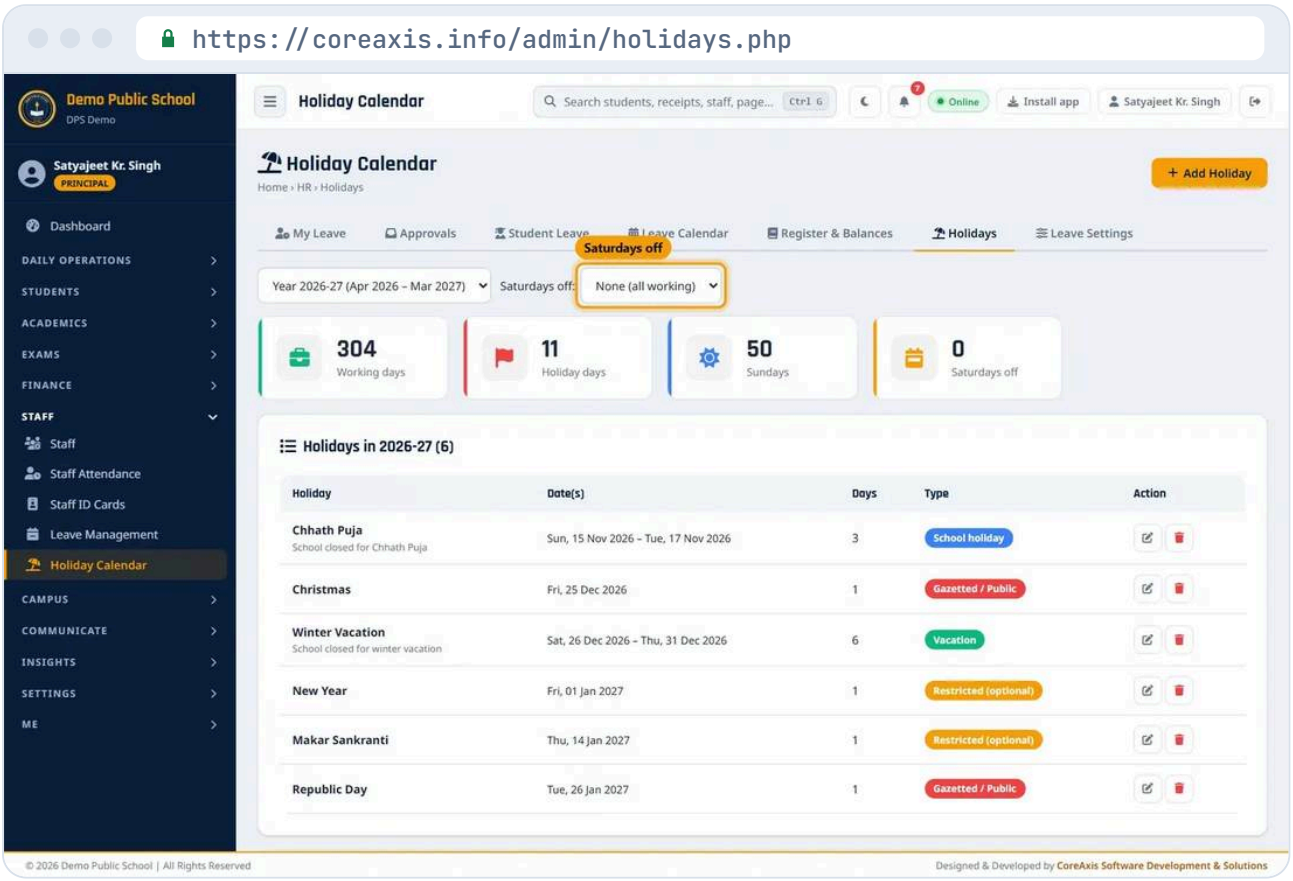
Chhath Puja added; Holiday days go up from 8 to 11.

TIP **Restricted (optional)** holidays are shown on the calendar but are not off days; staff who want them apply for leave.

TIP To change a holiday, click the pencil icon on its row. To remove it, click the bin icon and confirm.

Set the Saturday offs

1. In **Saturdays off**, choose the pattern: **None (all working)**, **2nd & 4th**, **1st & 3rd**, **2nd only**, **4th only** or **All Saturdays**.

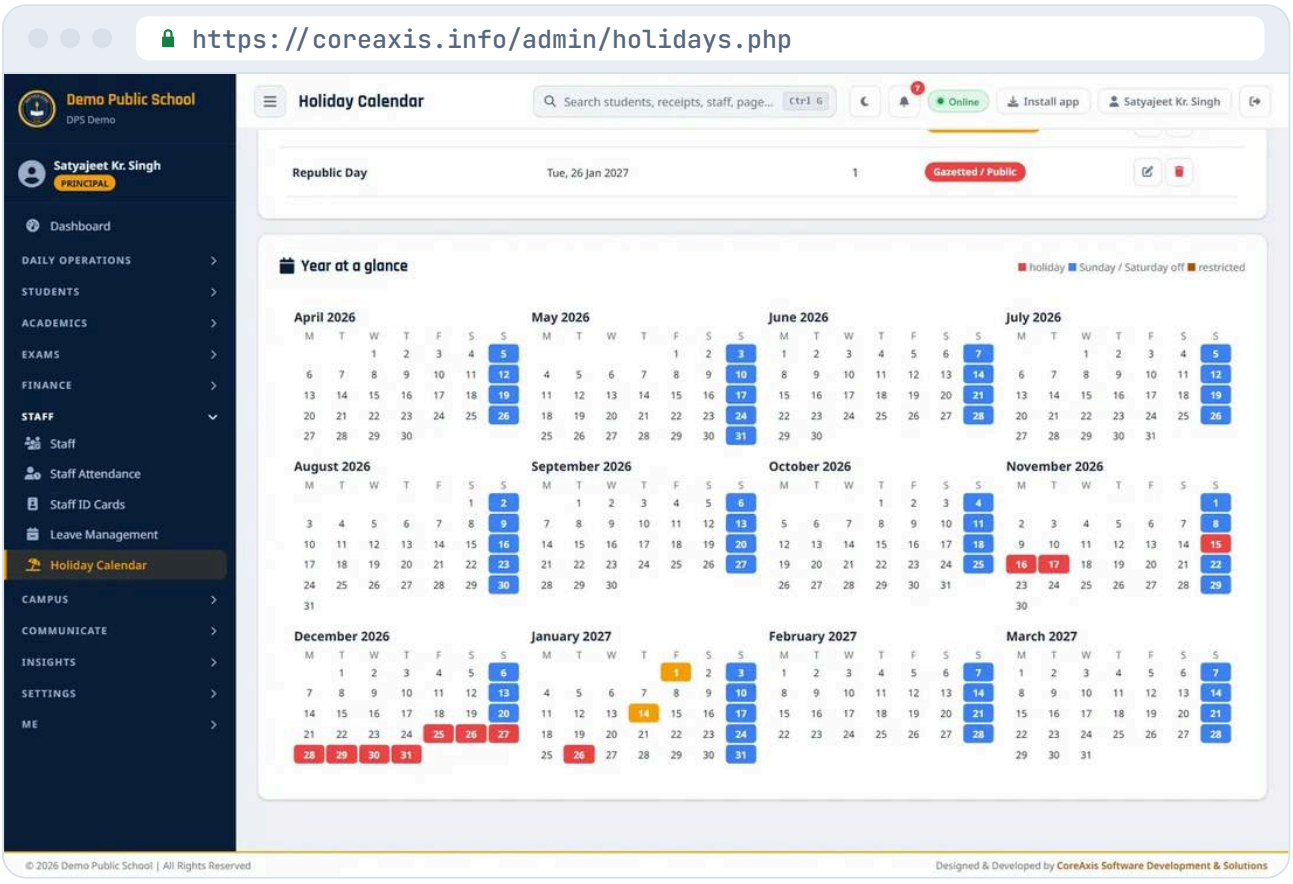


Saturdays off setting for the year.

2. Confirm the popup. Leave and attendance day counts follow this setting from now on.

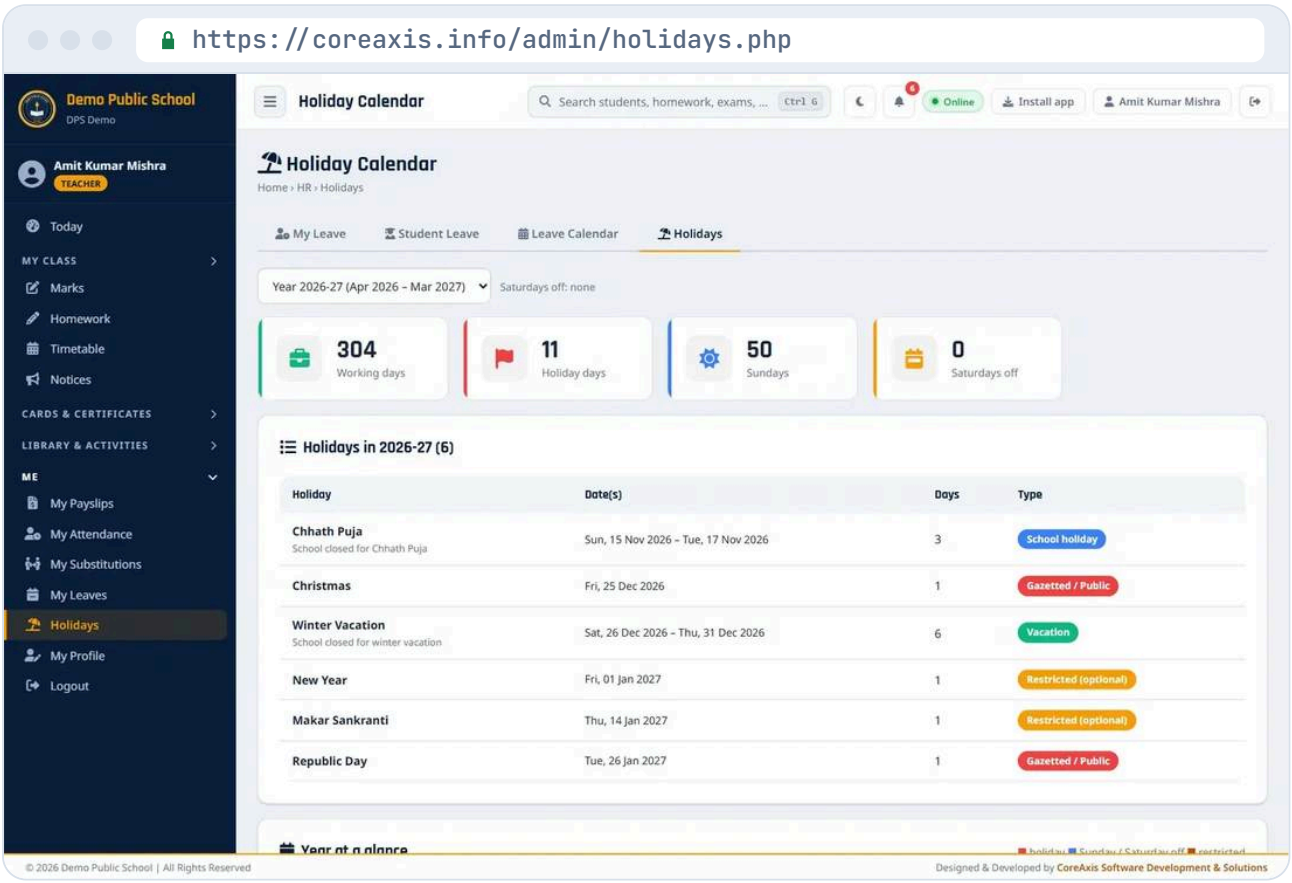
Read the year at a glance

1. Scroll down to **Year at a glance**. Red days are holidays, blue days are Sundays and Saturday offs, and amber days are restricted holidays.



Twelve months, April 2026 to March 2027.

2 Teachers and accountants open **Me › Holidays** to see the same list and calendar without edit buttons.



Teacher view: read only.

Screen at a glance

Year	Academic year (April to March) to show.
Working days	Days in the year minus Sundays, Saturday offs and holidays.
Holiday days	Total off days from gazetted, school and vacation holidays (restricted holidays are not counted).
Sundays / Saturdays off	Number of Sundays and Saturday offs in the year.
Type	Gazetted / Public, School holiday, Vacation, Restricted (optional).

Questions

Should I enter holidays for the whole year at once?

Yes, at the start of the session. Leave applications count days using the holidays that exist when the leave is applied. If you add a holiday later and a balance needs correcting, use Leave Settings › Adjust balance / credit Comp-off.

Staff worked on a holiday. How do they get a day back?

Credit a Compensatory Off (CO) in Leave Settings › Adjust balance / credit Comp-off, with the reason (for example: Worked on 15 Aug, Independence Day duty).

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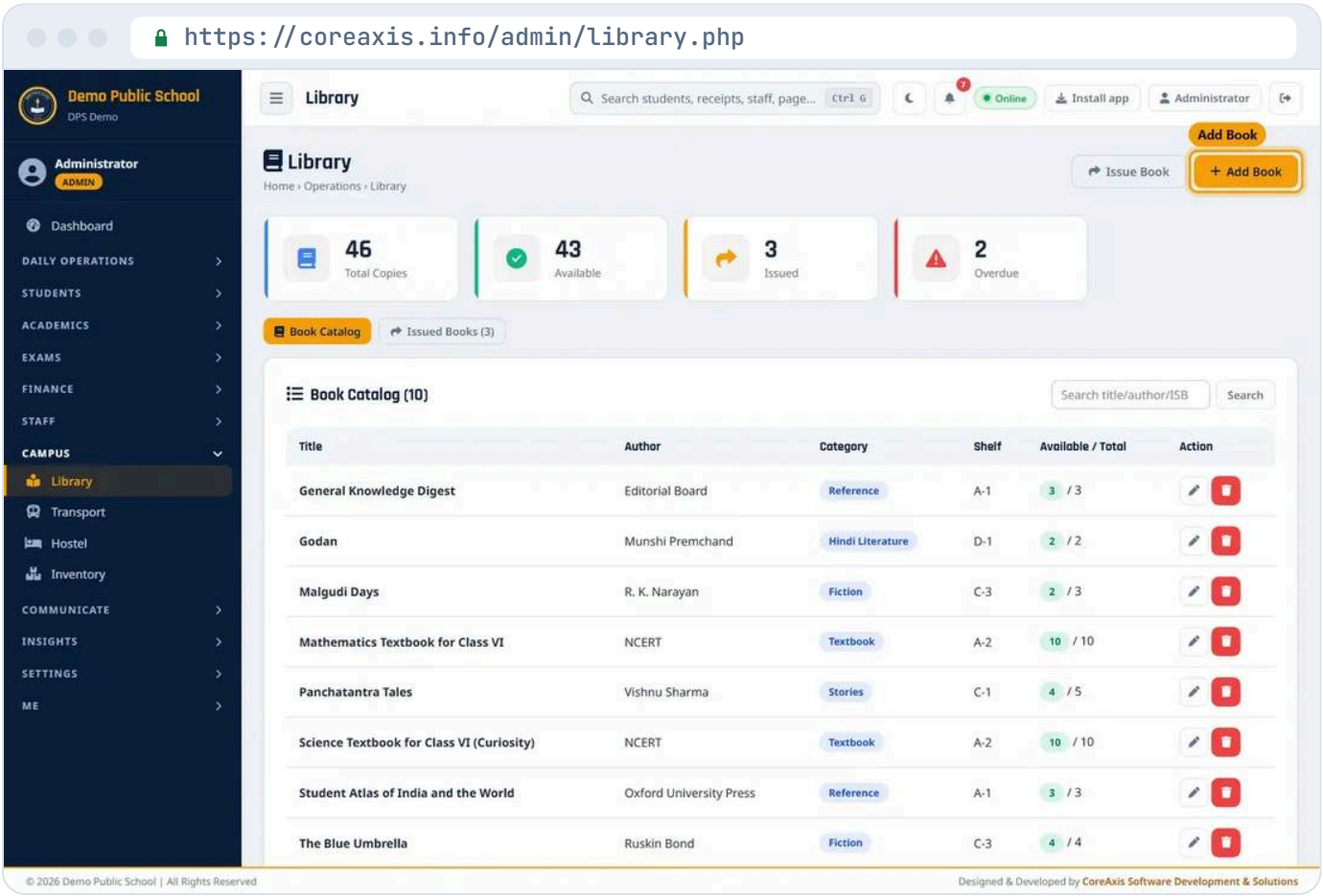
CAMPUS · CHAPTER 40

Library

Admin Principal Teacher MENU Campus › Library (Teacher: Library & Activities › Library Desk)

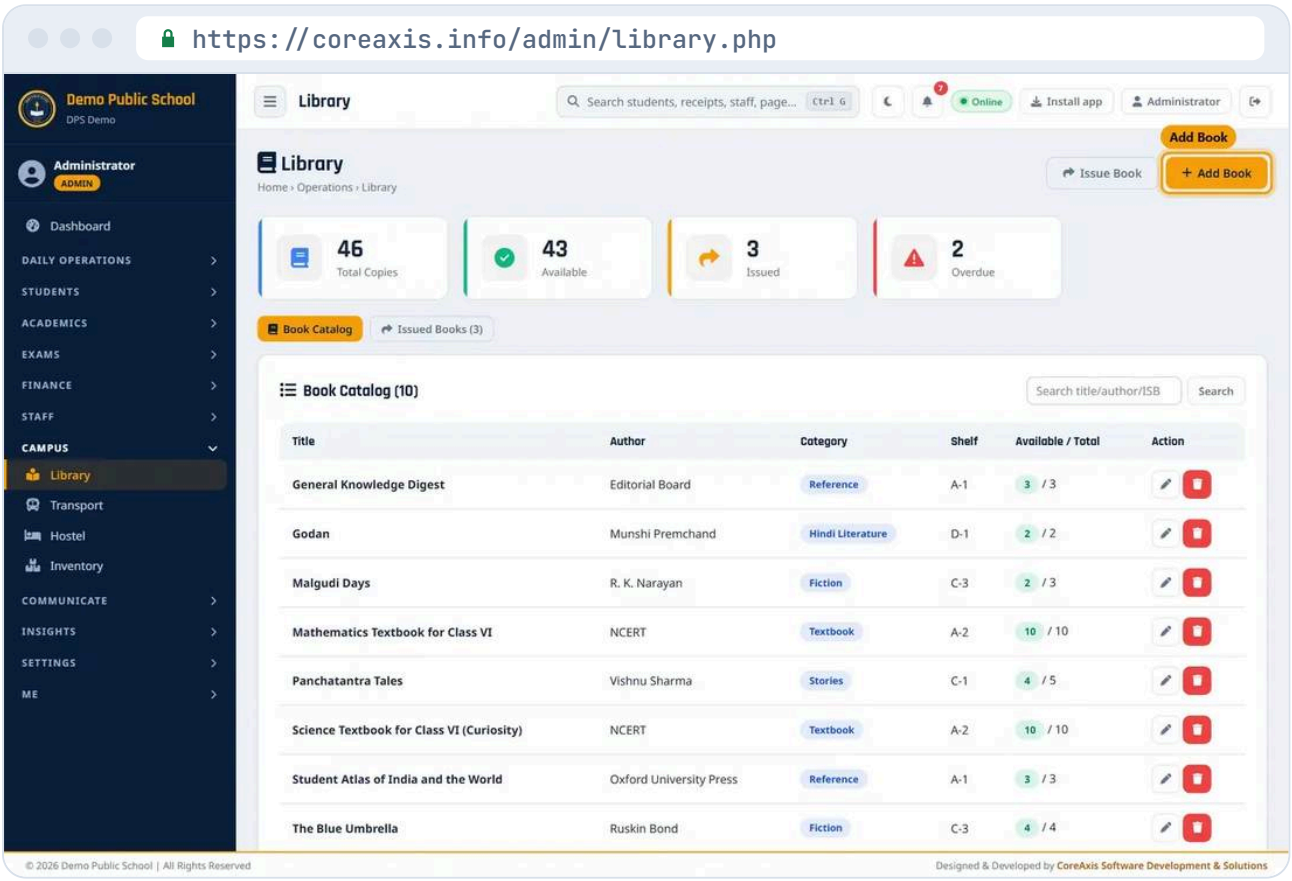
The Library page holds the school's book catalogue with copies on each shelf, and the list of books currently issued. Books can be issued to students or staff with a due date. When a book comes back late, the fine is worked out at ₹2 per day. Teachers (and a Librarian role) use the same screen from **Library & Activities › Library Desk**.



Library — Demo Public School

Add a book (example: The Discovery of India, 2 copies)

1. Open **Campus › Library**. The **Book Catalog** tab lists every title with available and total copies.

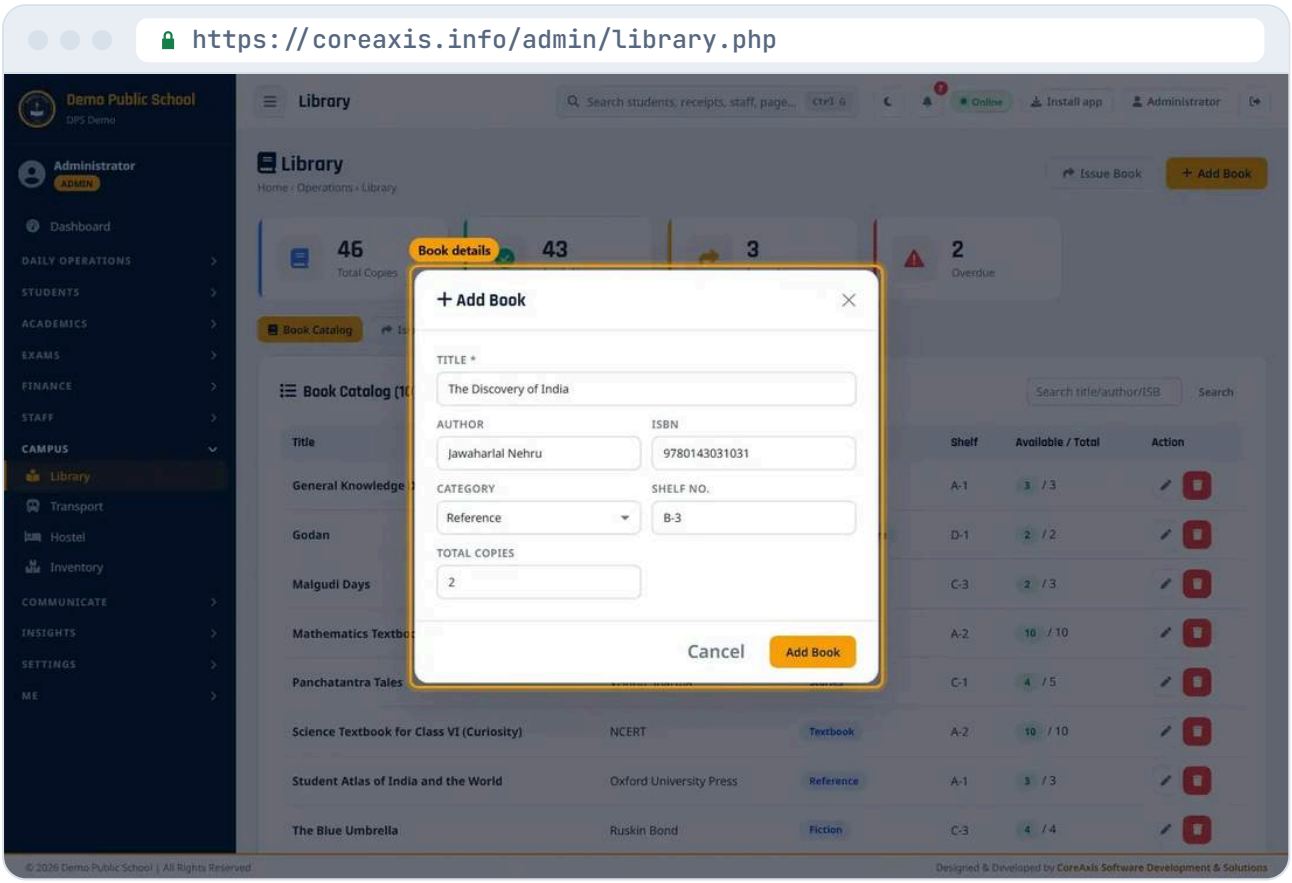


Book Catalog with copy counts.

2. Click **Add Book**.

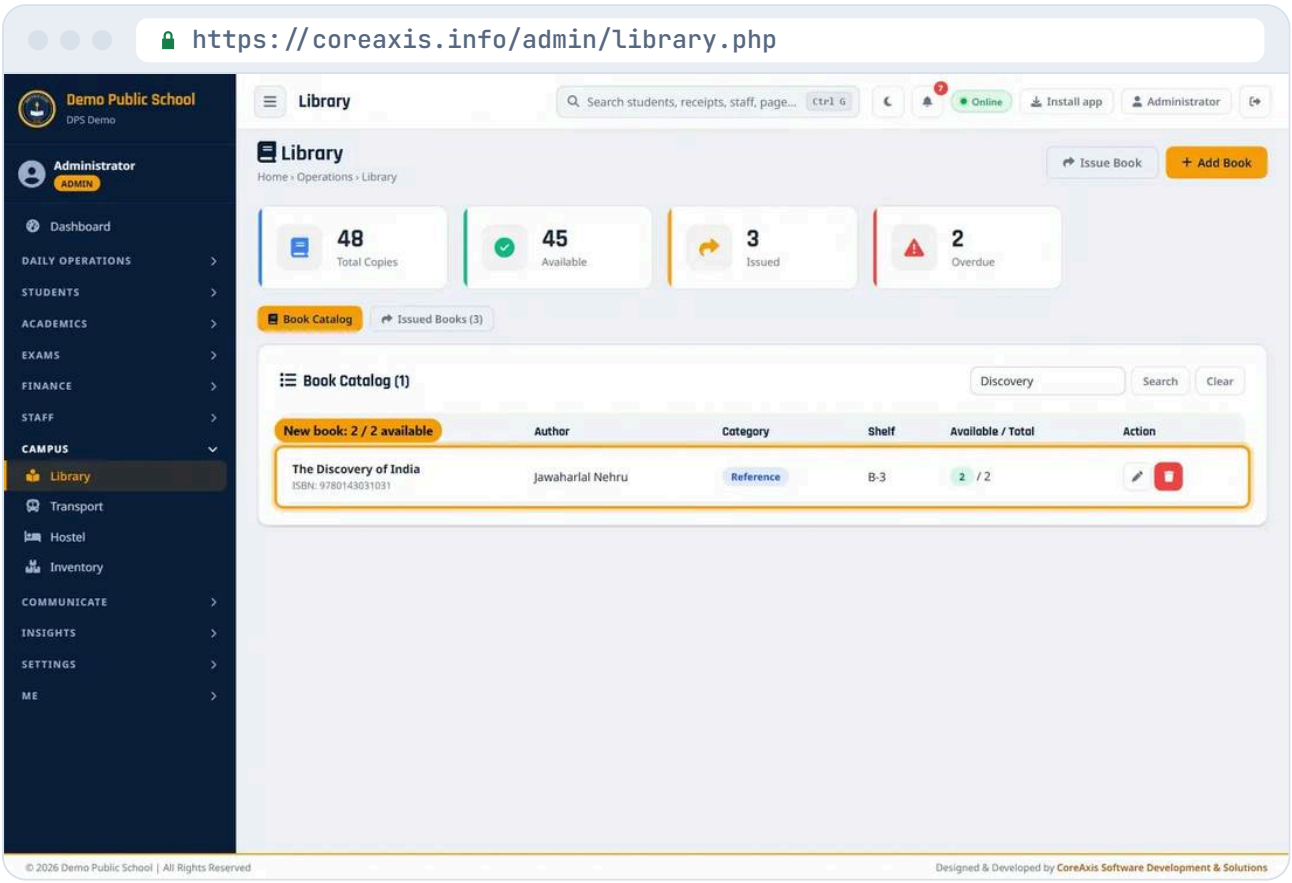
3. Type the **Title** (The Discovery of India) and **Author** (Jawaharlal Nehru). Add the **ISBN** if the book has one.

4 Choose the **Category** (Reference), type the **Shelf No.** (B-3) and the **Total Copies** (2).



Add Book form.

5 Click **Add Book** and confirm. The book appears in the catalogue as **2 / 2** available.



New title in the catalogue.

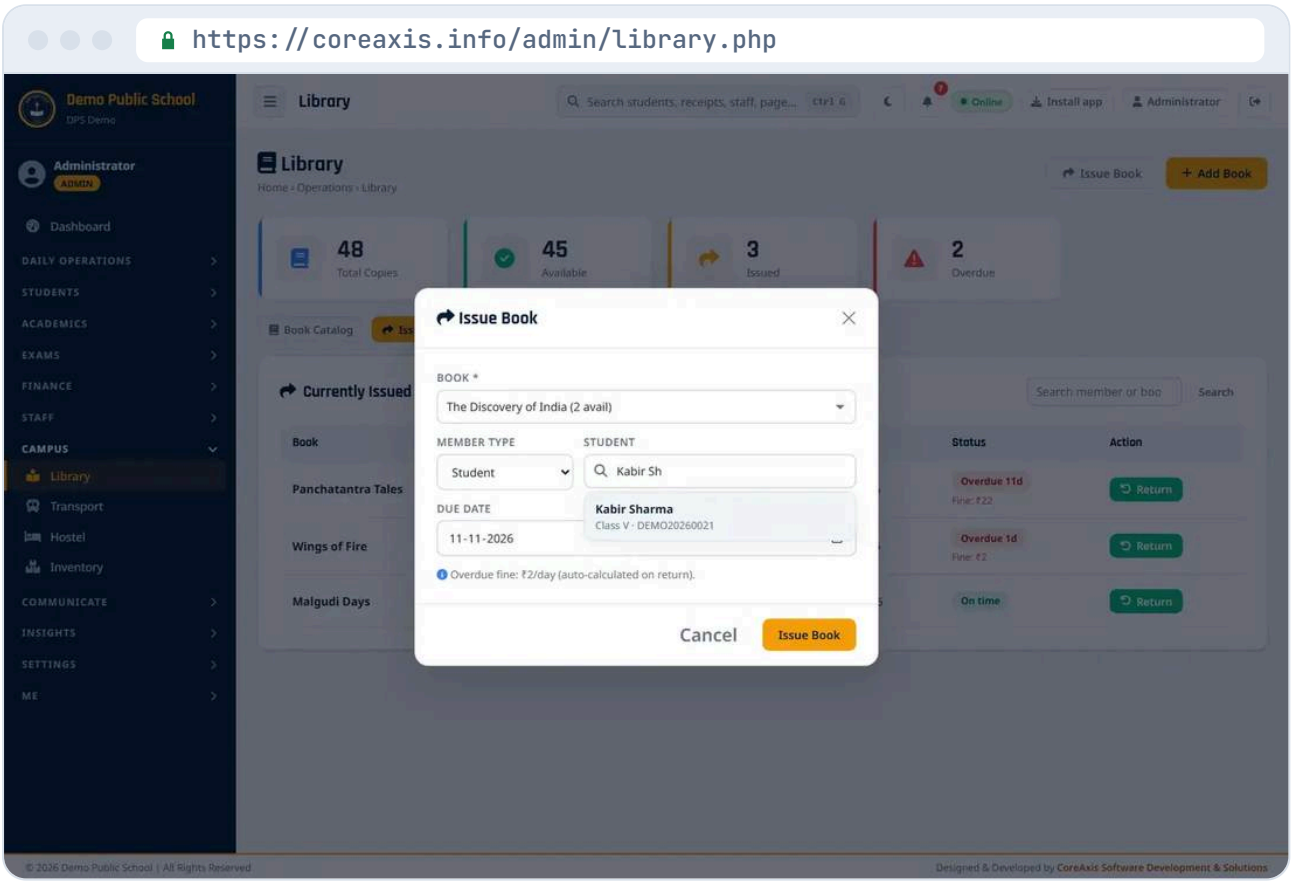
TIP To change copies or the shelf later, click the pencil icon on the book's row.

Issue a book to a student (example: Kabir Sharma, Class V, due 11 November 2026)

1 Click **Issue Book**.

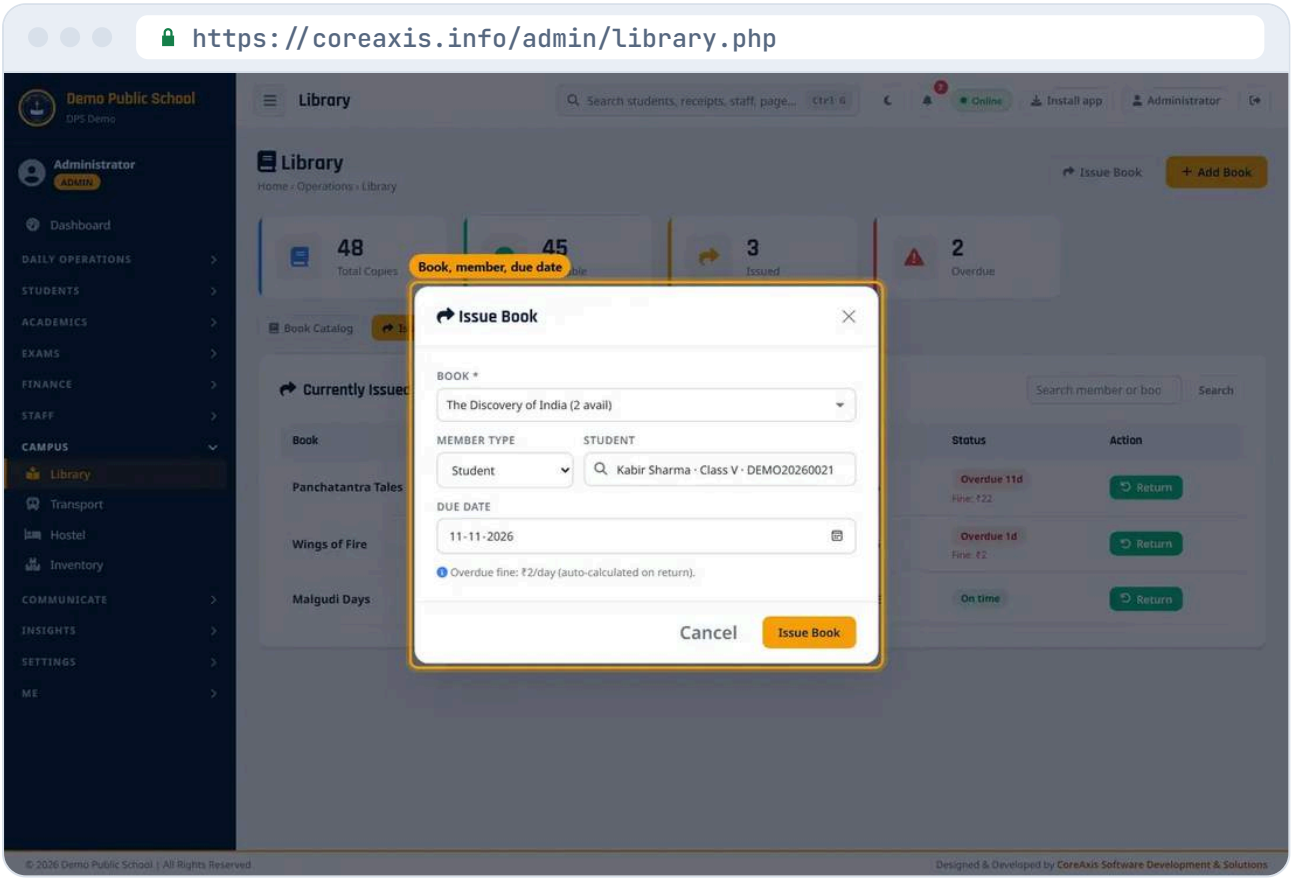
2 In **Book**, choose **The Discovery of India (2 avail)**.

3 Leave **Member Type** at **Student**. In **Student**, type at least two letters of the name or the admission number and pick the student from the list.



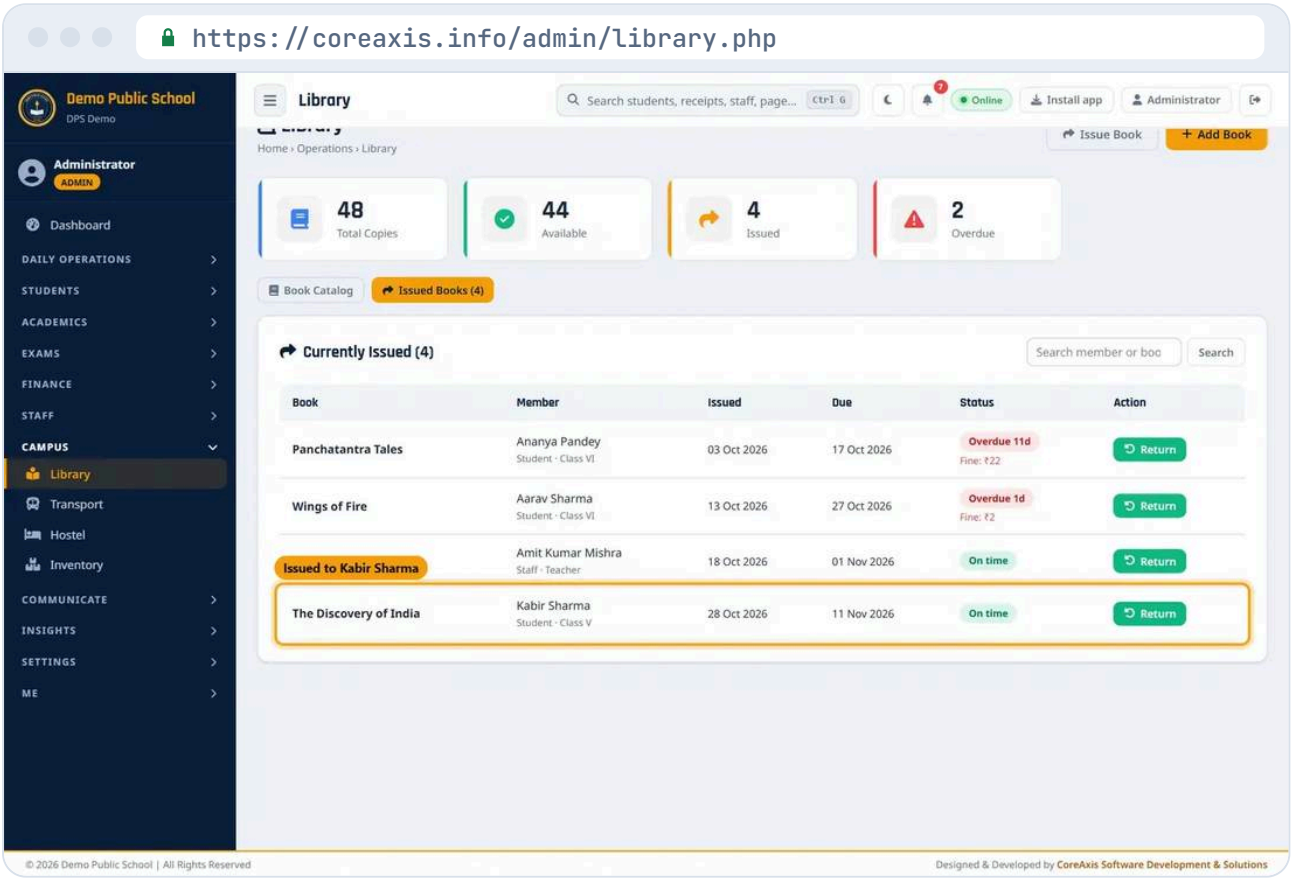
Member search shows class and admission number.

4 Check the **Due Date** (14 days from today by default; here 11-11-2026).



Book, member and due date filled.

5 Click **Issue Book** and confirm. The **Issued Books** tab now lists it as **On time**.

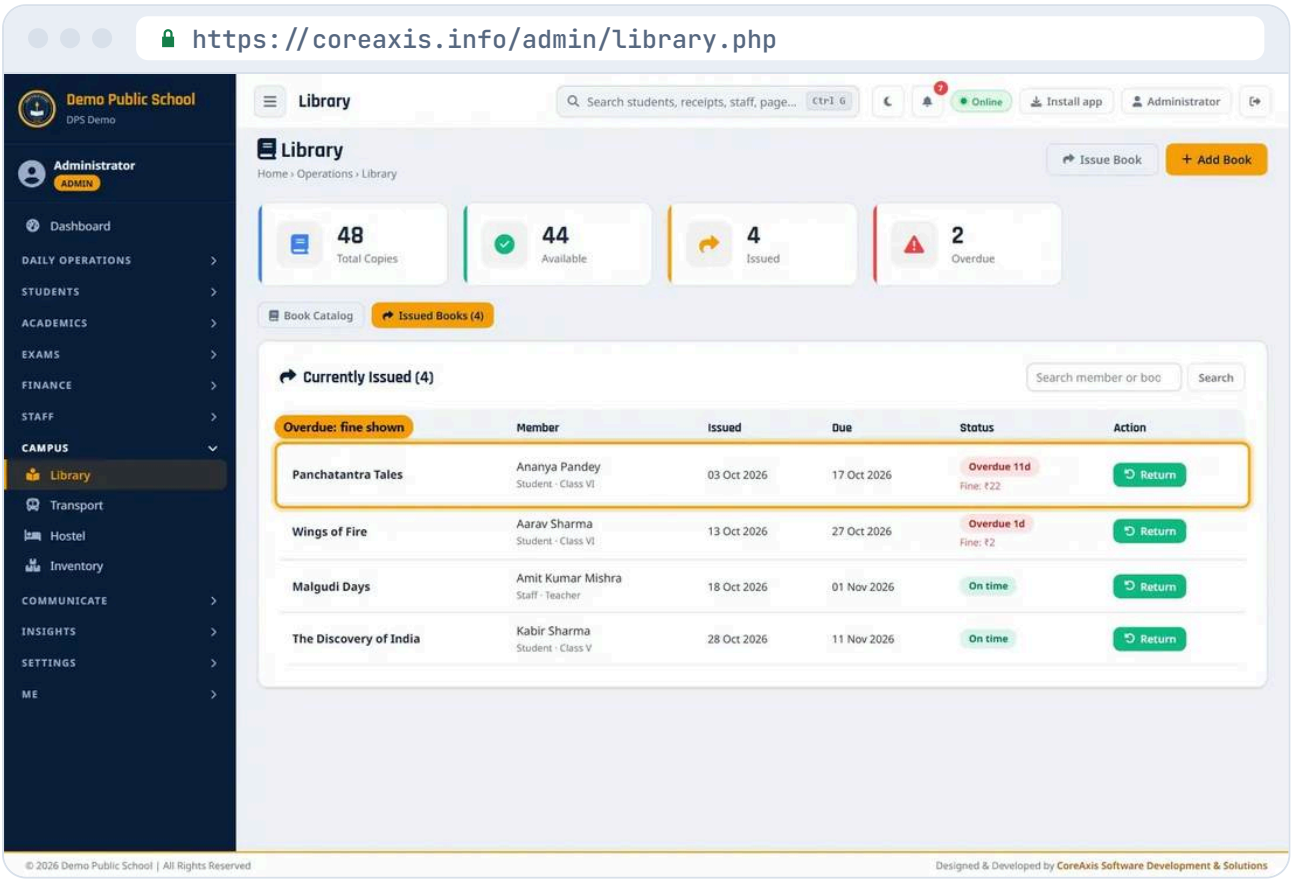


Currently Issued list.

TIP To issue to a teacher, set **Member Type** to **Staff** and search the staff name.

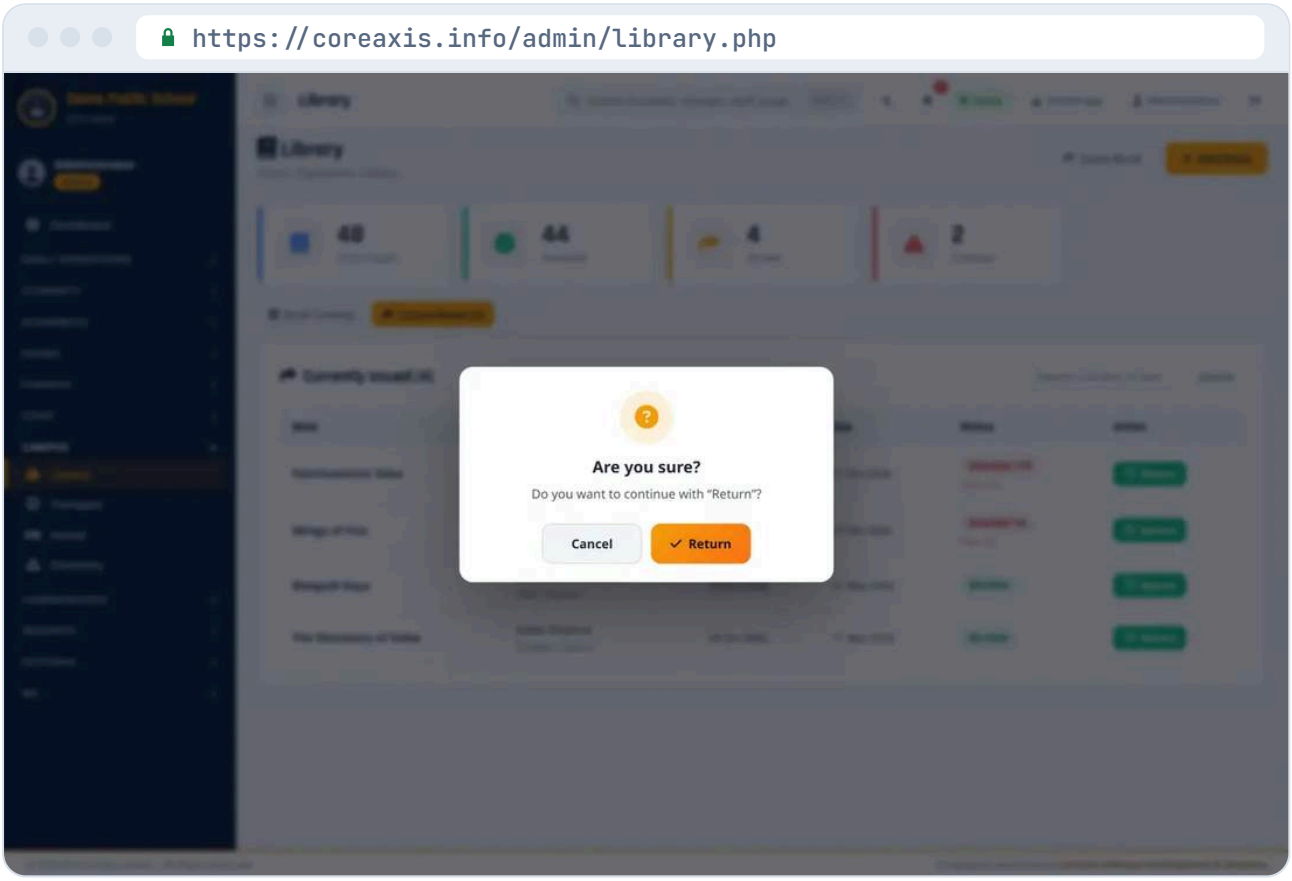
Take a return and see the fine (example: Panchatantra Tales, 11 days late)

1. Open the **Issued Books** tab. Late books show **Overdue Nd** in red with the fine so far.



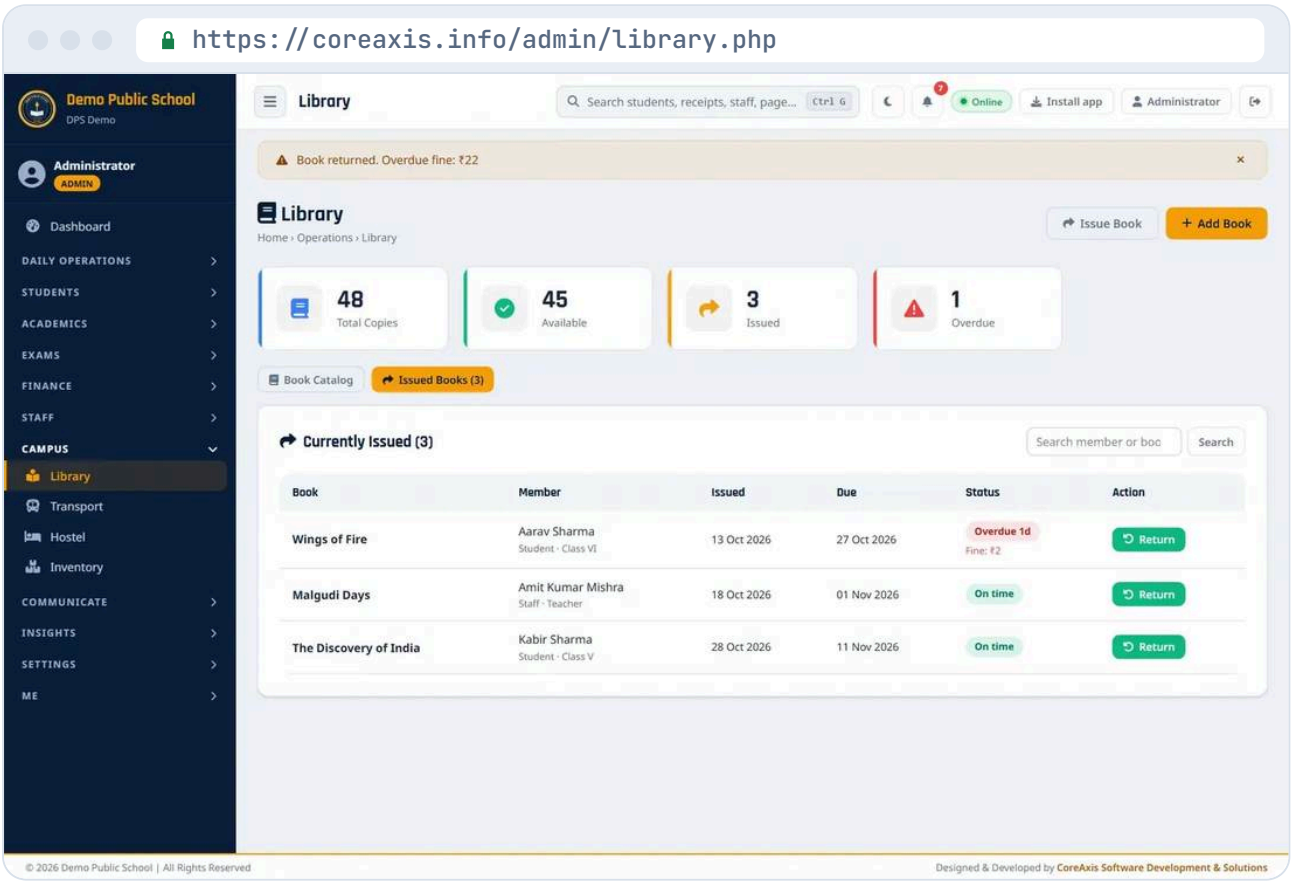
Overdue 11d, Fine: ₹22.

2 Click **Return** on the book's row and confirm in the popup.



Confirm the return.

3 The message **Book returned. Overdue fine: ₹22** appears. The copy is available again and the book leaves the issued list.



Return done; the fine is shown.

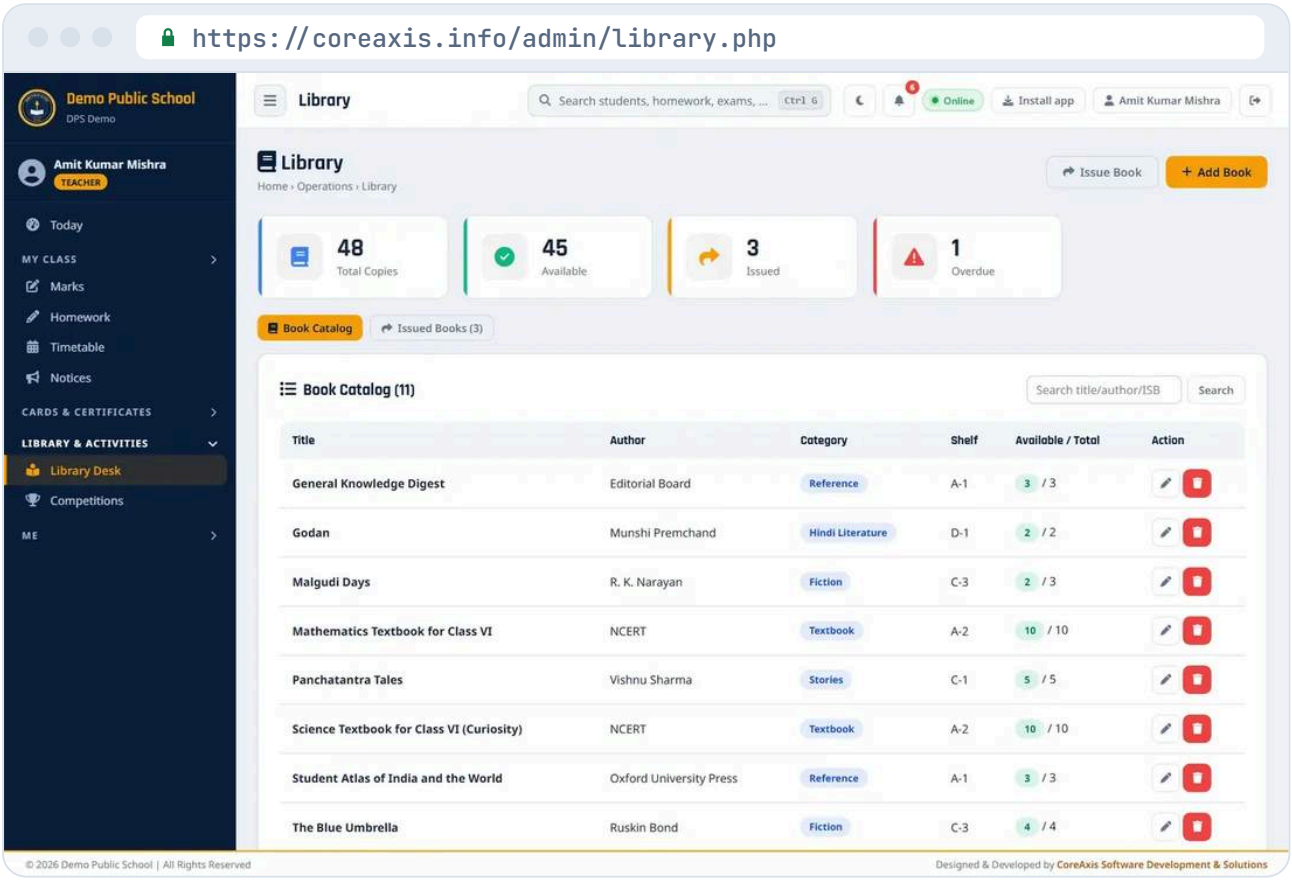
4 Collect the fine from the student and give a receipt from the Fee Desk if your school records fines as fees.

IMPORTANT The fine is calculated and stored with the return, but it is not added to the student's fee dues by itself. Collect it at the counter.

Library Desk for teachers

Teachers open **Library & Activities › Library Desk**. They see the same catalogue and issued list and can issue and return books, for example in a class library period.

1 Teacher view of the Library Desk.



Library Desk signed in as a teacher.

Screen at a glance

Total Copies / Available / Issued / Overdue	Counts across the whole catalogue.
Book Catalog	Title, Author, Category, Shelf, Available / Total, with Edit and Delete.
Issued Books	Book, Member (student with class, or staff), Issued, Due, Status (On time / Overdue with fine), Return.
Search	Catalog: title, author or ISBN. Issued Books: member or book.
Fine rule	₹2 for each day after the due date, worked out on return.

Questions

A student lost a book.

Return it in the system so it leaves the issued list, collect the cost, then edit the book and reduce Total Copies by one.

Can the due date be extended?

Return the book and issue it again with a new due date.

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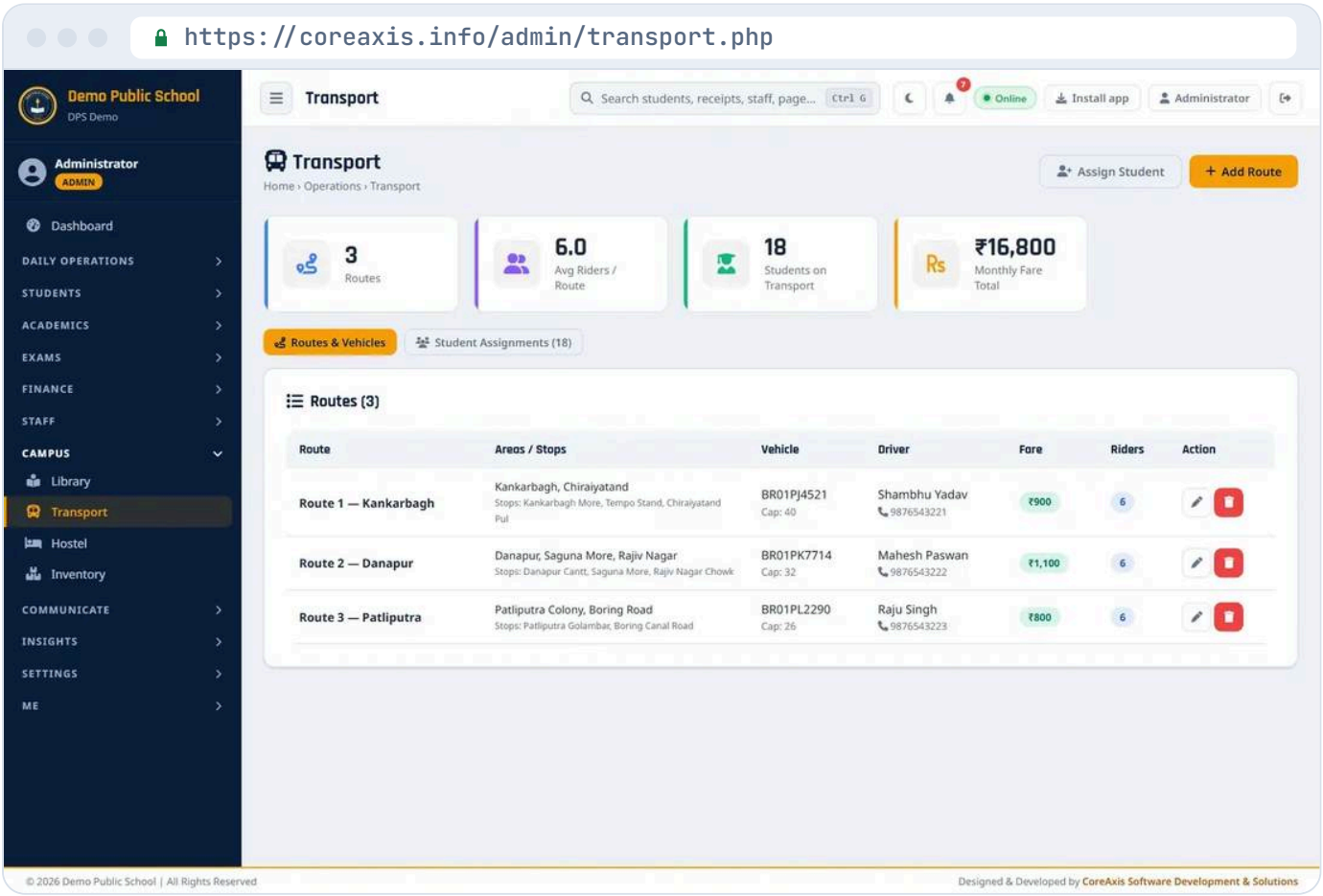
CAMPUS · CHAPTER 41

Transport

Admin Principal MENU Campus › Transport

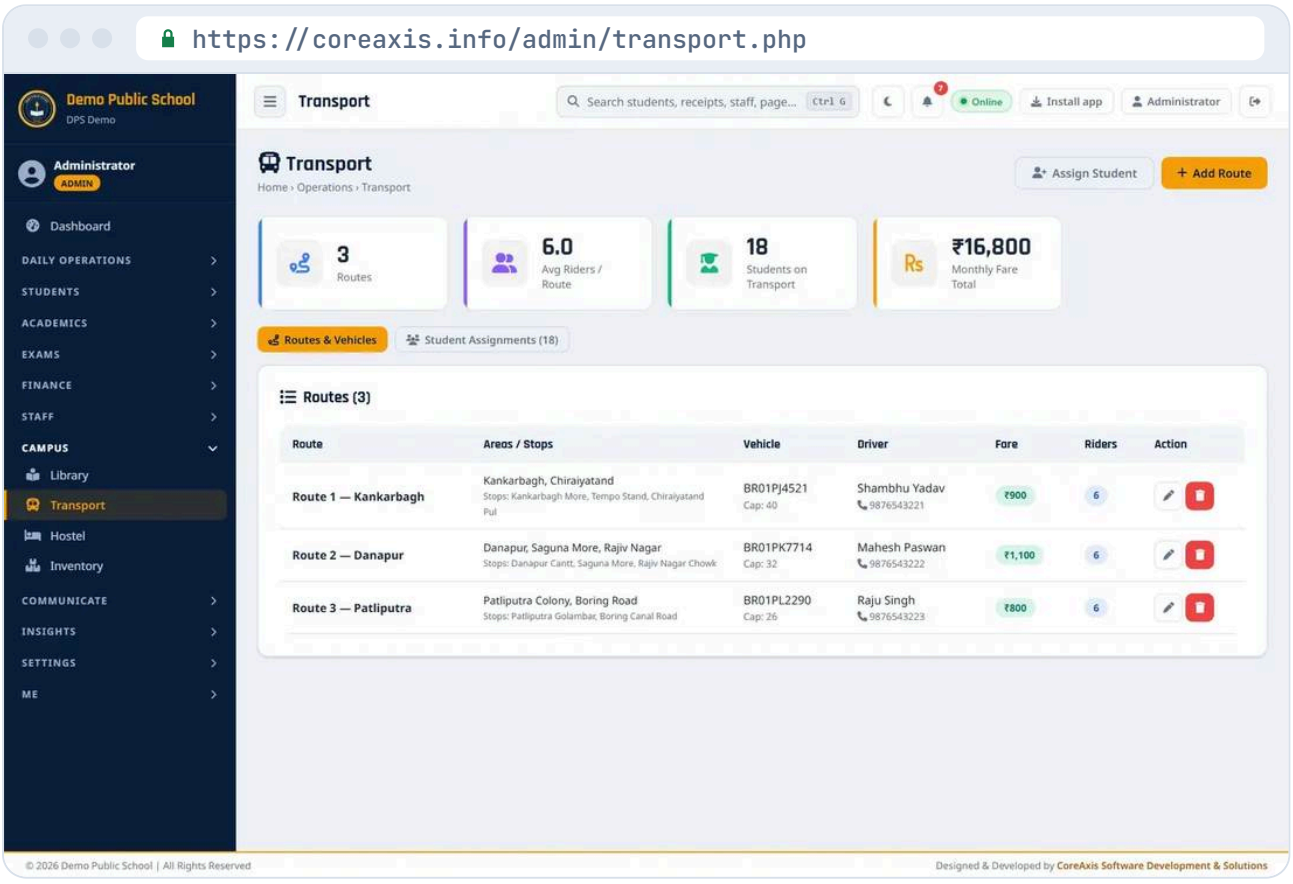
Transport keeps the school's bus routes: areas and stops covered, vehicle number and seats, driver and monthly fare. Each student who uses the bus is assigned to one route with a pickup point. The route fare is billed to the student's dues once a transport charge is set up in **Finance › Fee Structure › Extra charges** (Charge to: Transport route, Amount: route fare).



Transport — Demo Public School

Add a route (example: Route 4 — Bailey Road)

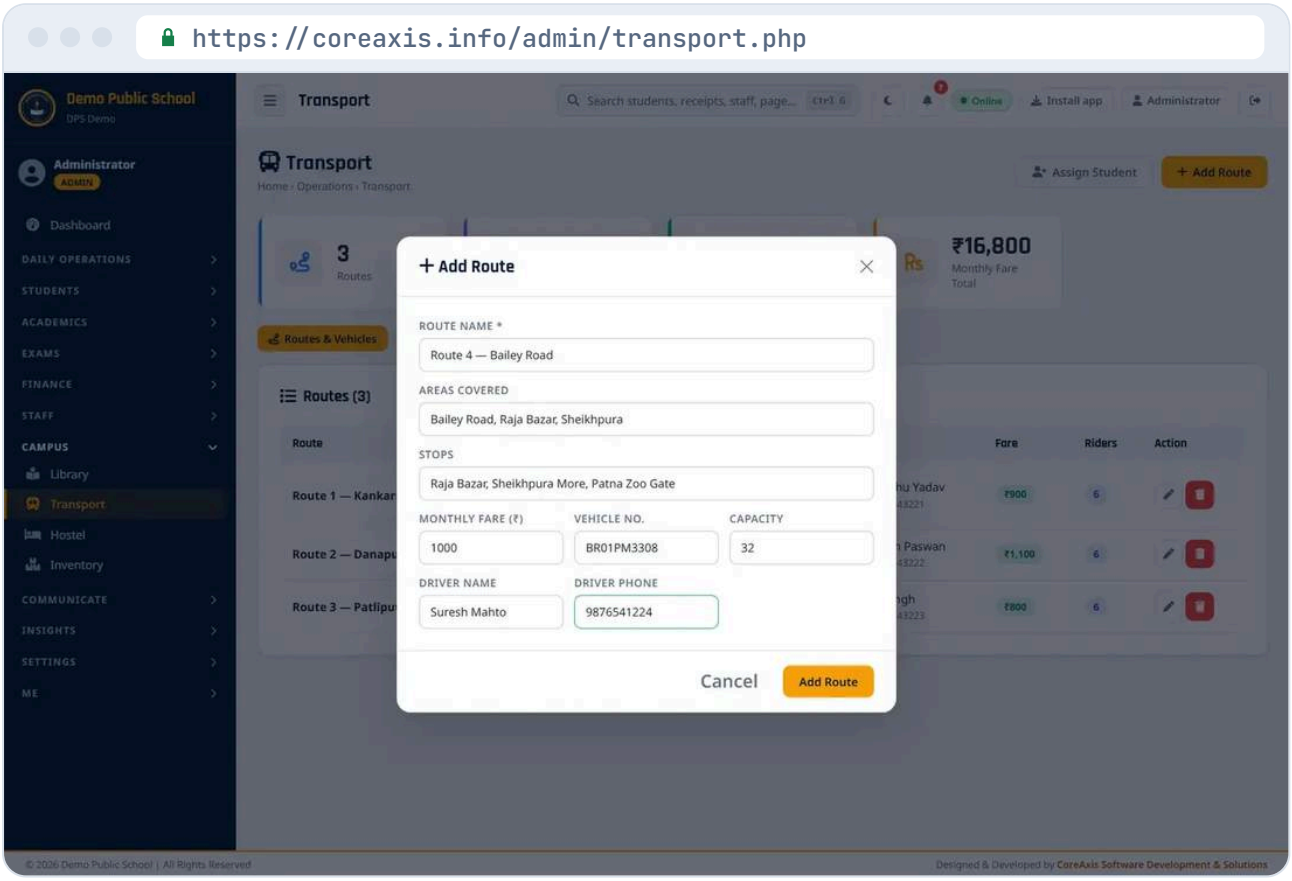
1. Open **Campus › Transport**. The **Routes & Vehicles** tab lists each route with riders and fare.



Three routes, 18 students on transport.

2. Click **Add Route**.
3. Type the **Route Name** (Route 4 — Bailey Road), **Areas Covered** and **Stops** (comma-separated).
4. Fill **Monthly Fare (₹)** (1000), **Vehicle No.** (BR01PM3308) and **Capacity** (32).

5 Fill **Driver Name** (Suresh Mahto) and **Driver Phone** (9876541224).



Add Route form.

6 Click **Add Route** and confirm.

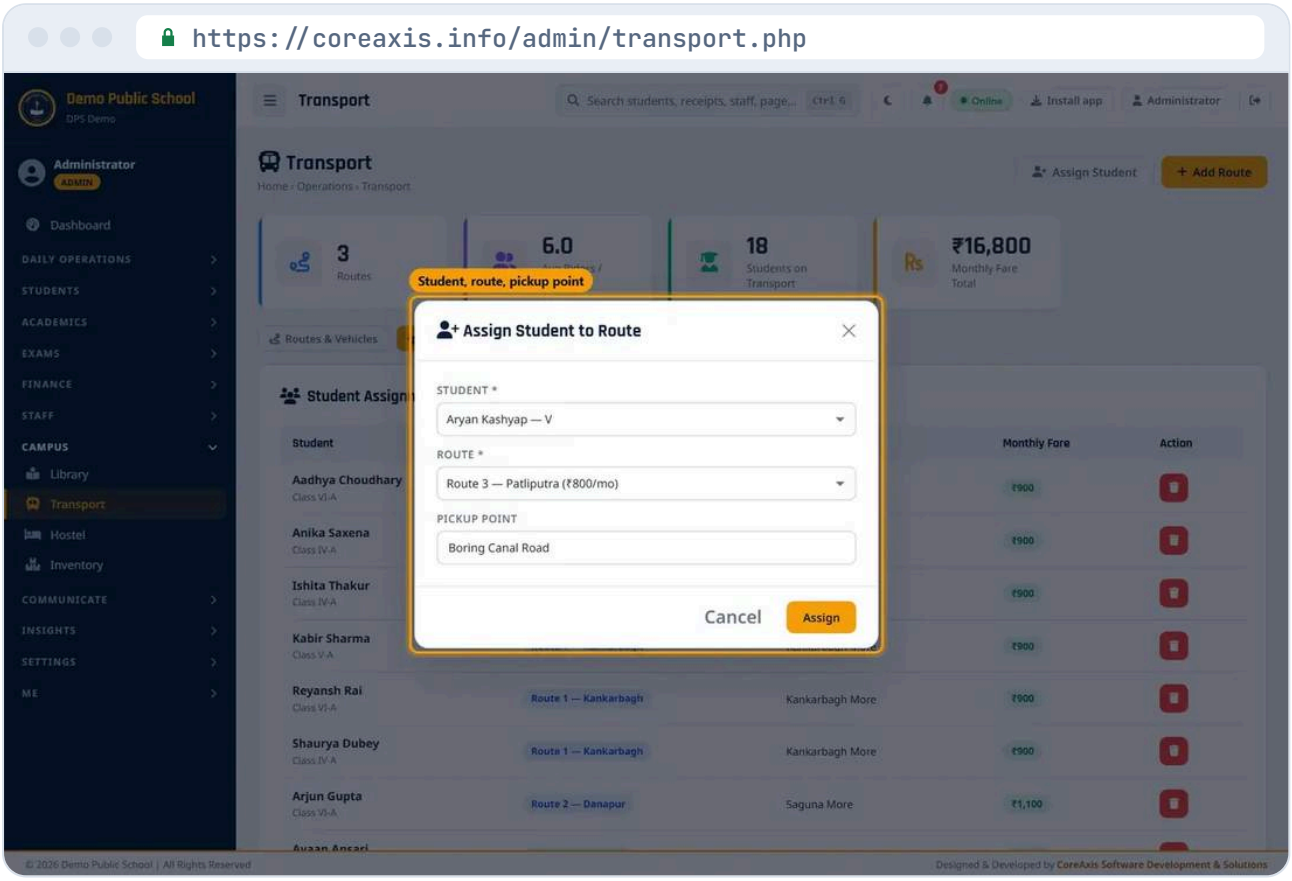
Assign a student to a route (example: Aryan Kashyap, Class V, Route 3 — Patliputra)

1 Click **Assign Student** (on either tab).

2 In **Student**, type the name and choose **Aryan Kashyap — V**. Only active students without a route are listed.

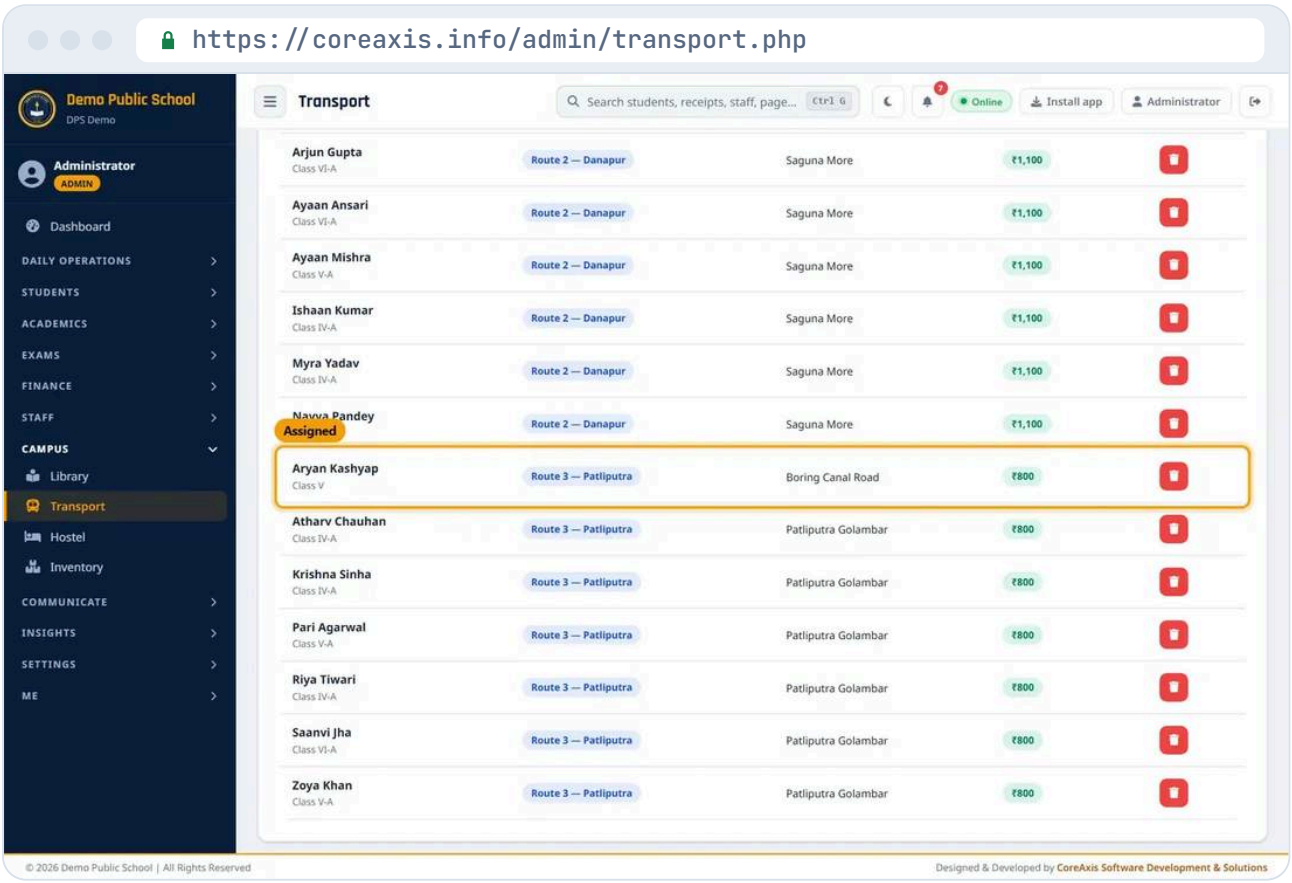
3 In **Route**, choose **Route 3 — Patliputra (₹800/mo)**.

4 Type the **Pickup Point** (Boring Canal Road).



Assign Student to Route.

5 Click **Assign** and confirm. The student appears in **Student Assignments** with the route, pickup point and monthly fare.



Aryan Kashyap on Route 3 at Boring Canal Road.

TIP To move a student to another route, remove the assignment (red button) and assign again.

TIP Parents see the route, pickup point, driver and phone in the parent portal.

Screen at a glance

Routes / Avg Riders / Students on Transport / Monthly Fare Total	Summary cards; Monthly Fare Total adds the fare of every assigned student.
Routes & Vehicles	Route, Areas / Stops, Vehicle and capacity, Driver and phone, Fare, Riders, Edit / Delete.
Student Assignments	Student and class, Route, Pickup Point, Monthly Fare, Remove.

Questions

I assigned a student but the fee does not show in dues.

Assigning only records the route. Add a monthly transport charge once in Fee Structure › Extra charges (Charge to: Transport route, Amount: the route fare). After that, every assigned student is billed each month.

A bus is full.

The Riders column shows how many students are on each route against the vehicle Capacity. Move some students to another route or edit the route to a bigger vehicle.

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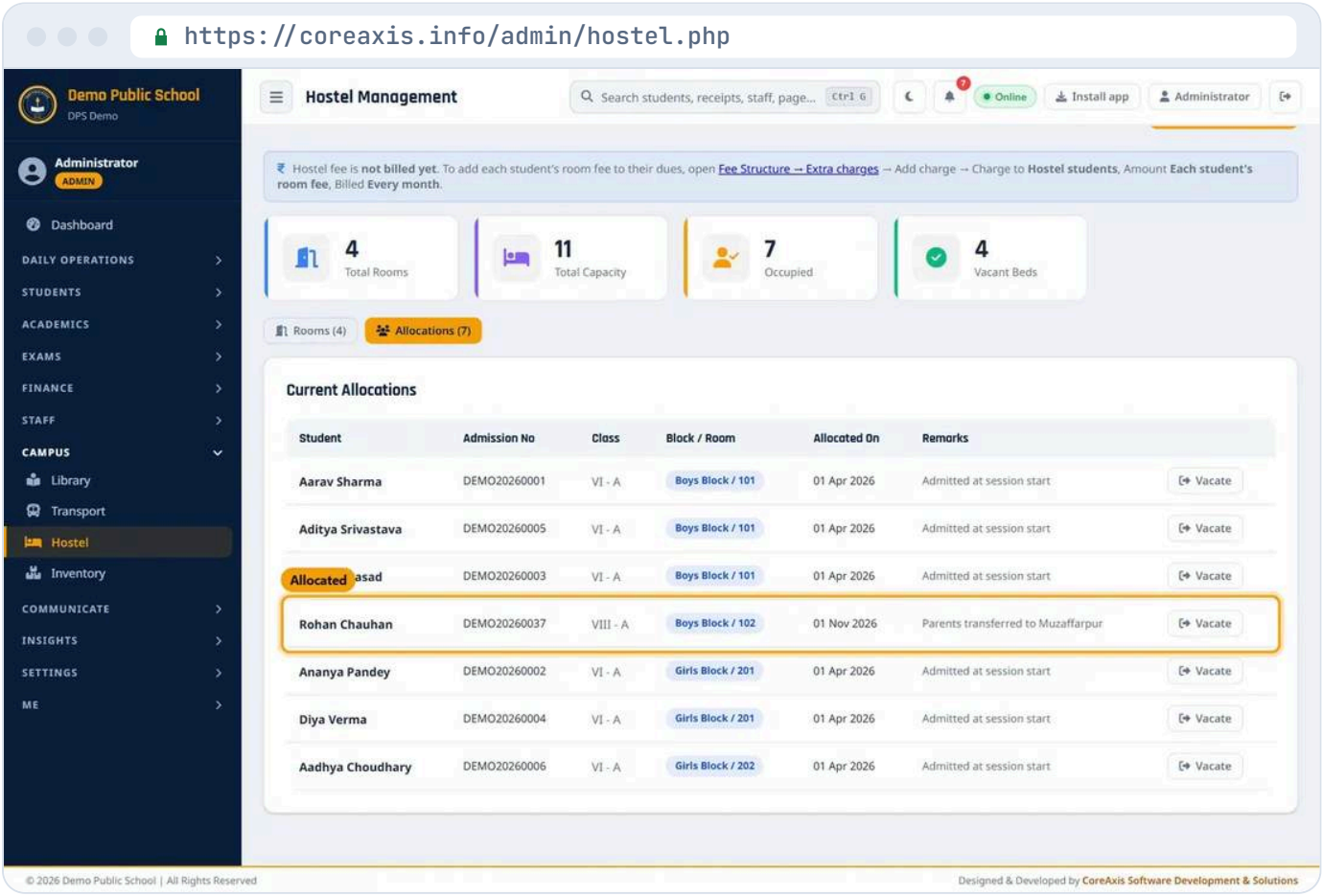
CAMPUS · CHAPTER 42

Hostel

Admin Principal MENU Campus › Hostel

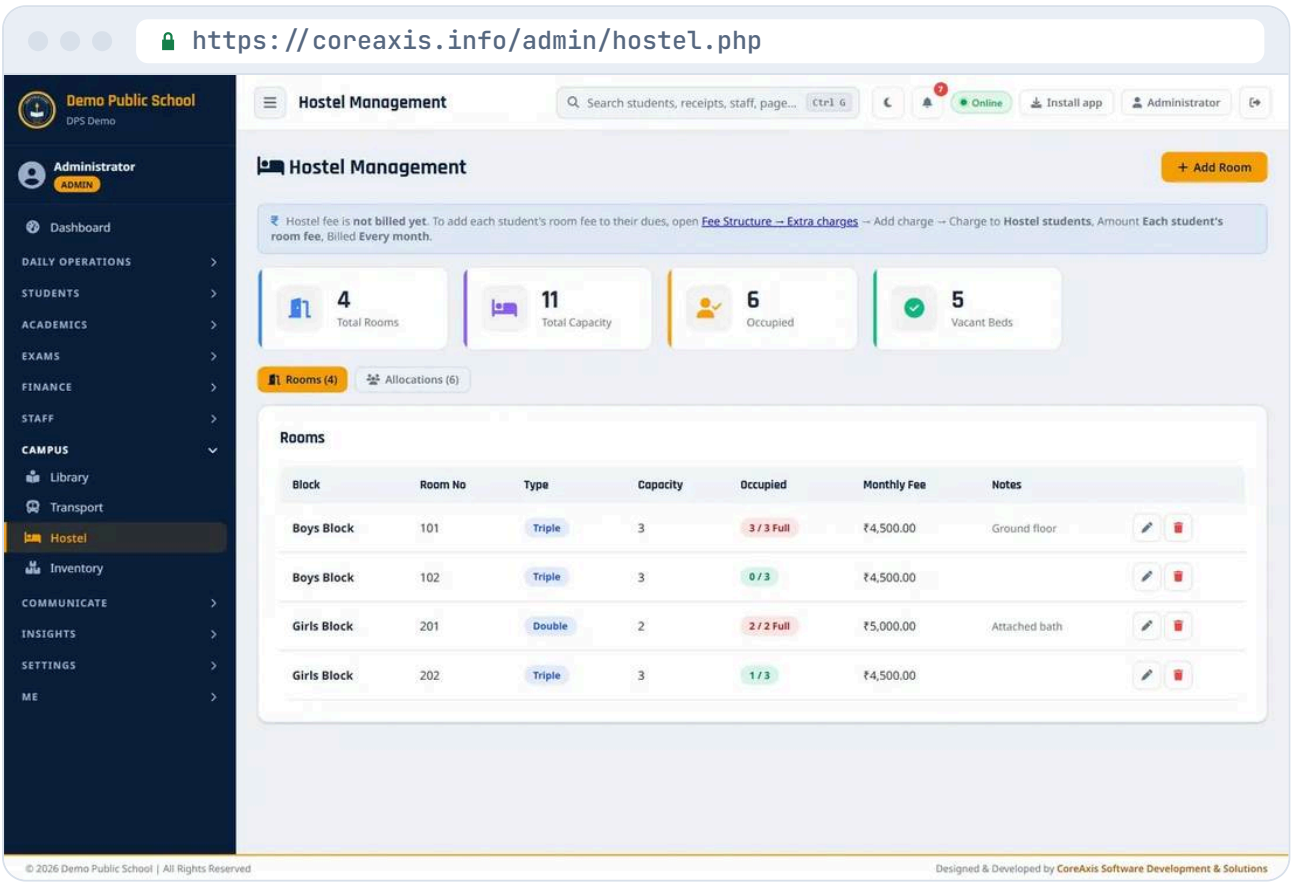
The Hostel page lists rooms by block with capacity and monthly fee, and the students allotted to each bed. A room cannot take more students than its capacity, and a student can hold only one bed at a time. The room fee reaches the student's dues through one hostel charge in **Finance › Fee Structure › Extra charges**.



Hostel — Demo Public School

Add a room (example: Boys Block, Room 103, 6-bed dormitory)

1. Open **Campus › Hostel**. The **Rooms** tab shows each room with occupied beds.

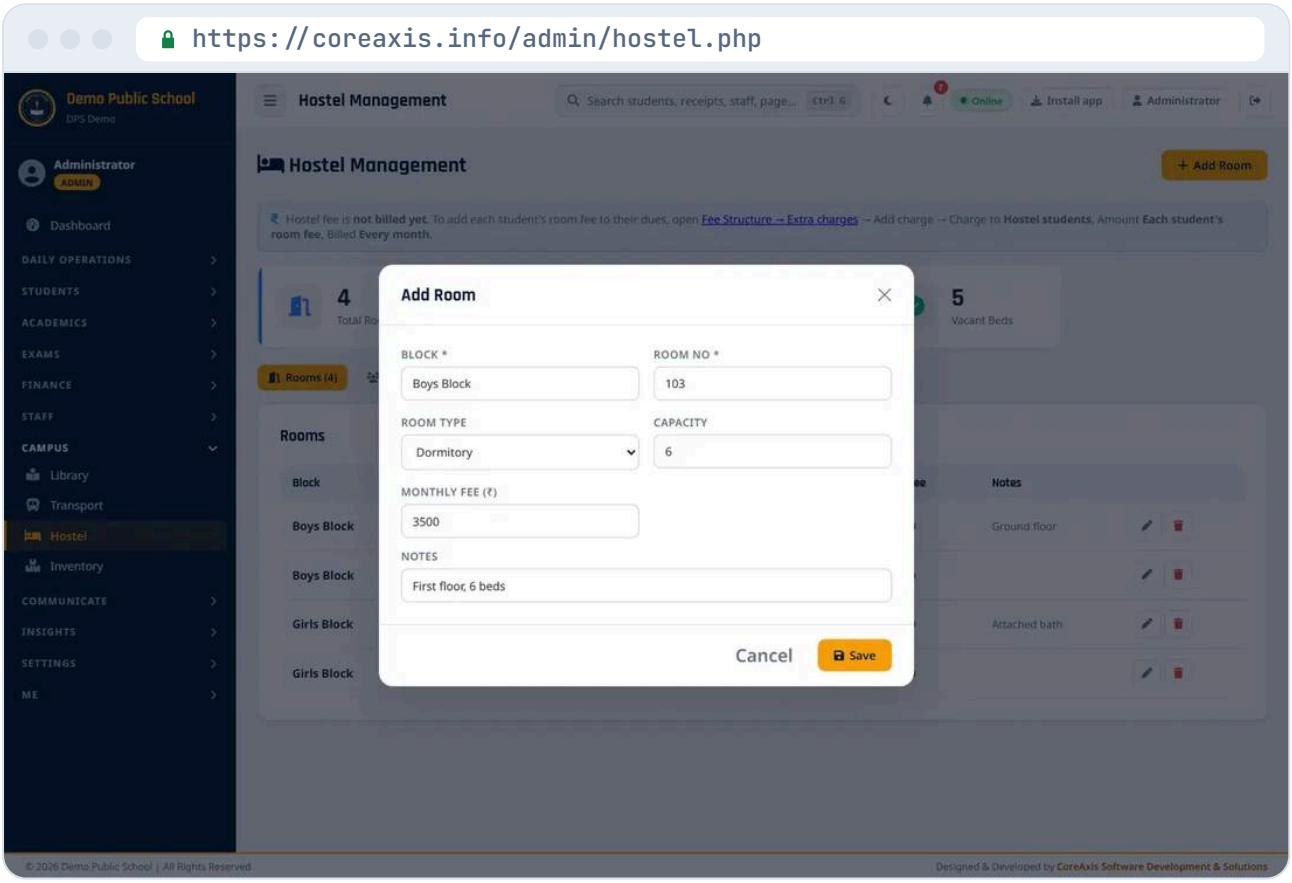


Rooms with capacity, occupancy and monthly fee.

2. Click **Add Room**.

3. Type the **Block** (Boys Block) and **Room No** (103).

4 Choose the **Room Type** (Dormitory; the list has Standard, Single, Double, Triple, Deluxe, Dormitory, AC and Non-AC), and fill **Capacity** (6), **Monthly Fee (₹)** (3500) and **Notes**.



Add Room form.

5 Click **Save** and confirm.

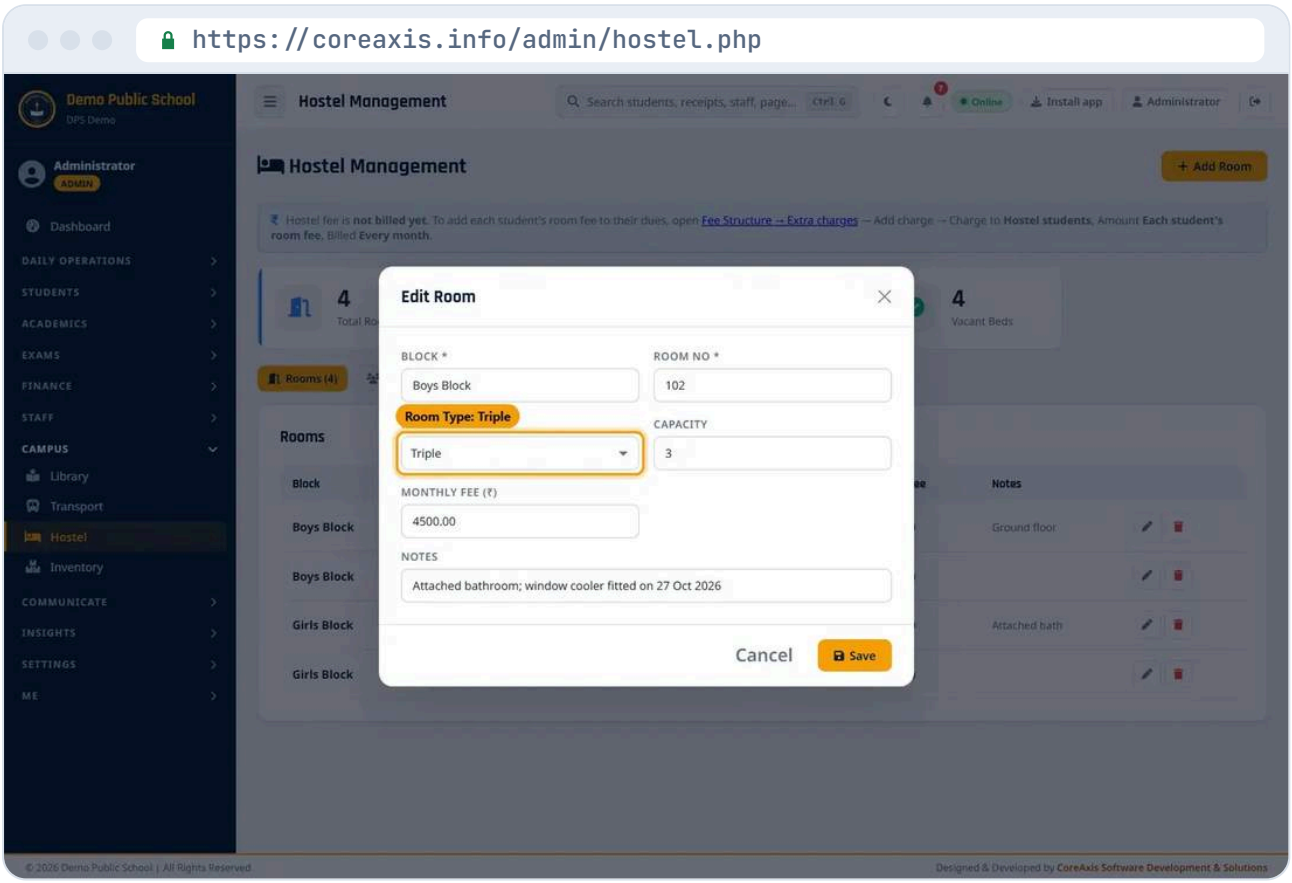
TIP Block + room number must be unique. Capacity cannot be lowered below the students already in the room.

Edit a room (example: Boys Block 102, Triple, new note)

1 On the **Rooms** tab, click the pencil icon on the row of **Boys Block / 102**.

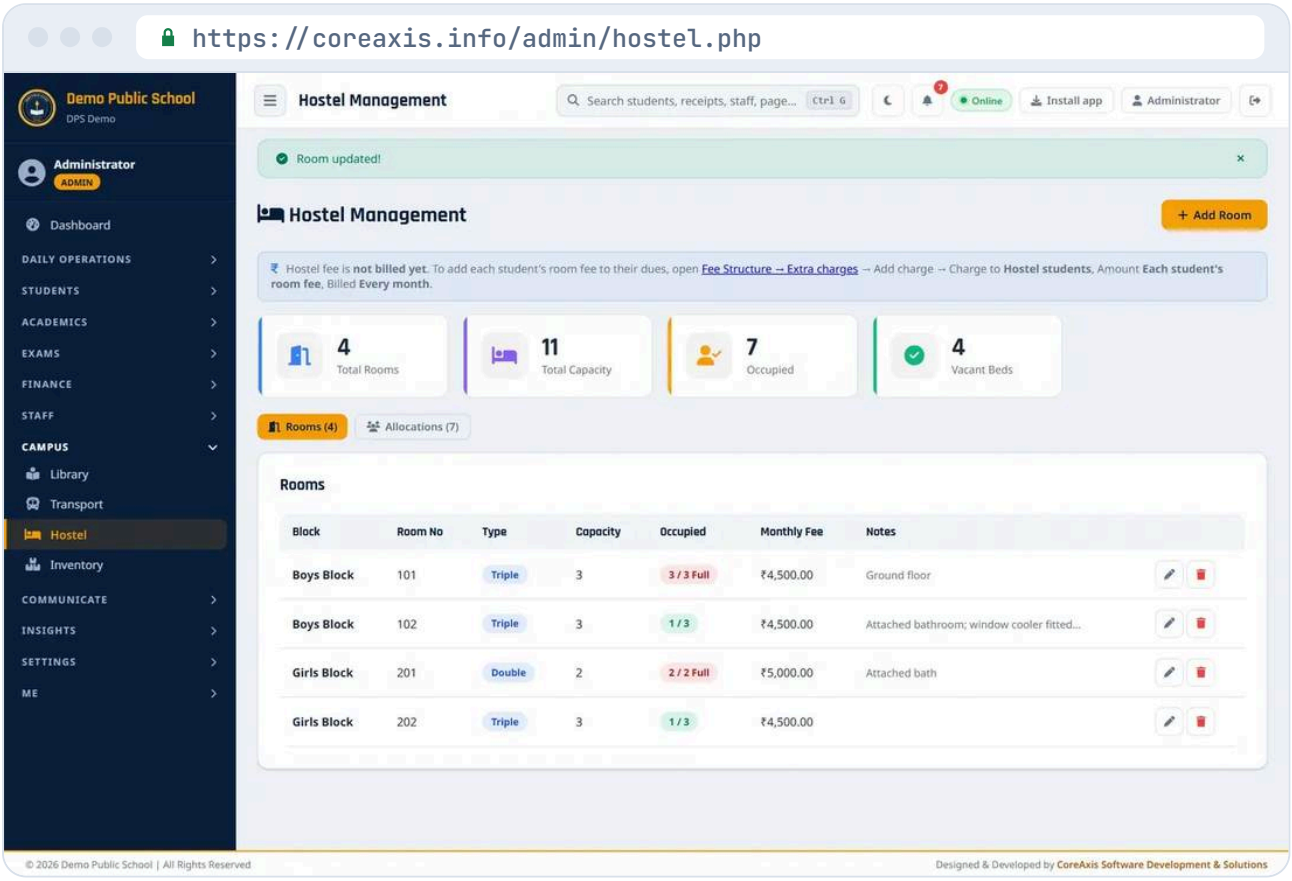
2 The **Edit Room** form opens with the saved values. **Room Type** shows **Triple**.

3 Change what you need, for example **Notes**: Attached bathroom; window cooler fitted on 27 Oct 2026.



Edit Room keeps the room's type (Triple).

4 Click **Save** and confirm. The message **Room updated!** appears.



Boys Block 102 with the new note.

TIP Capacity cannot be lowered below the number of students already in the room.

Allot a student to a room (example: Rohan Chauhan, Class VIII, Boys Block 102, from 1 November 2026)

1 Open the **Allocations** tab and click **Allocate Student**.

2 In **Student**, choose **Rohan Chauhan (DEMO20260037 · VIII)**. Students who already have a bed are not listed.

3 In **Room**, choose **Boys Block / 102 (0/3, ₹4,500)**. Only rooms with a free bed are listed.

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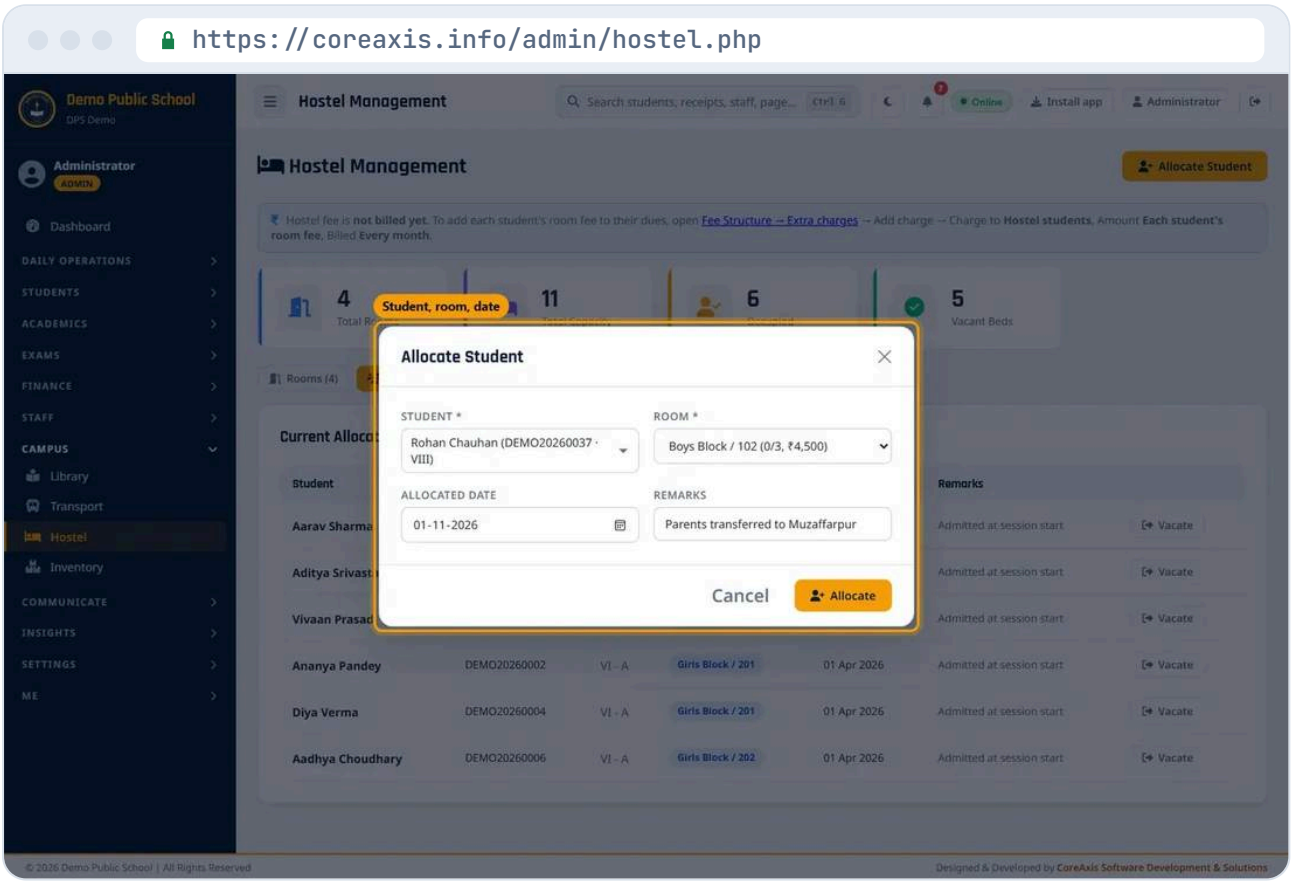
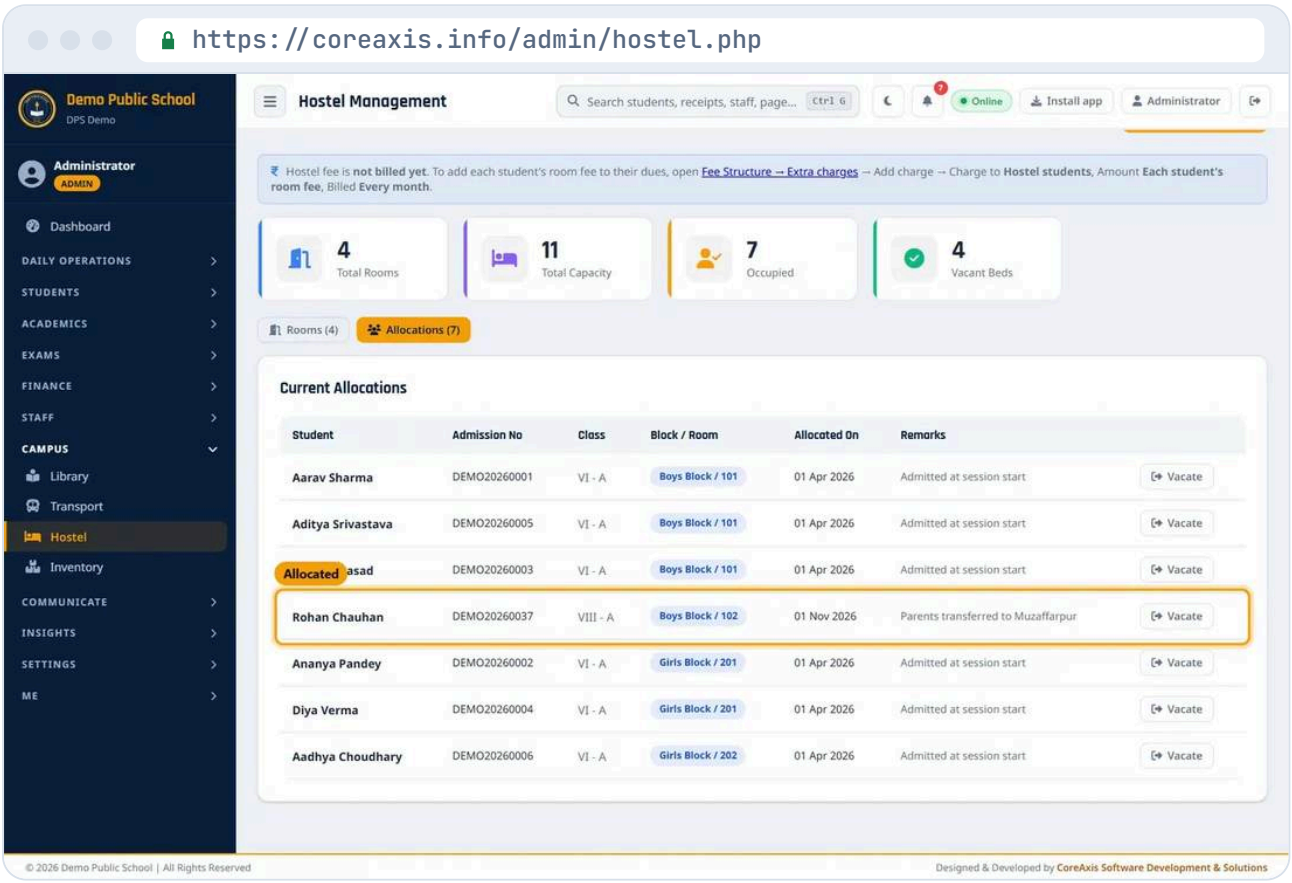
4 Set the **Allocated Date** (01-11-2026) and type **Remarks** (Parents transferred to Muzaffarpur).



Allocate Student form.

5 Click **Allocate** and confirm. The message **Student allocated to room.** appears and he is listed under **Current Allocations**.



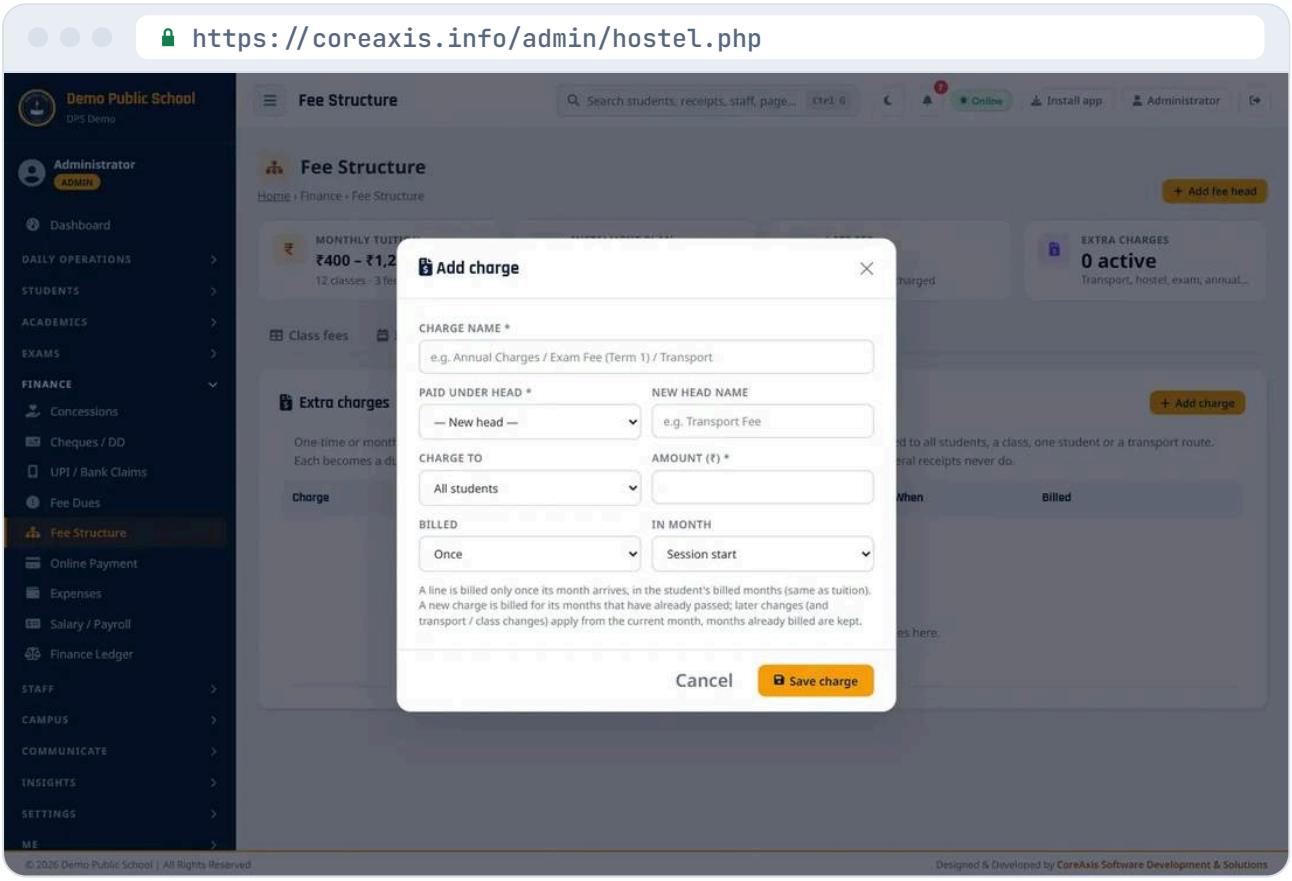
Rohan Chauhan in Boys Block / 102.

TIP When a student leaves the hostel, click **Vacate** on the row. The bed becomes free; the student's record stays.

Bill the hostel fee to students' dues

Until this charge exists, the Hostel page shows the note: Hostel fee is not billed yet. Set it up once per session.

1 Open **Finance › Fee Structure** and go to **Extra charges**. Click **Add charge**.

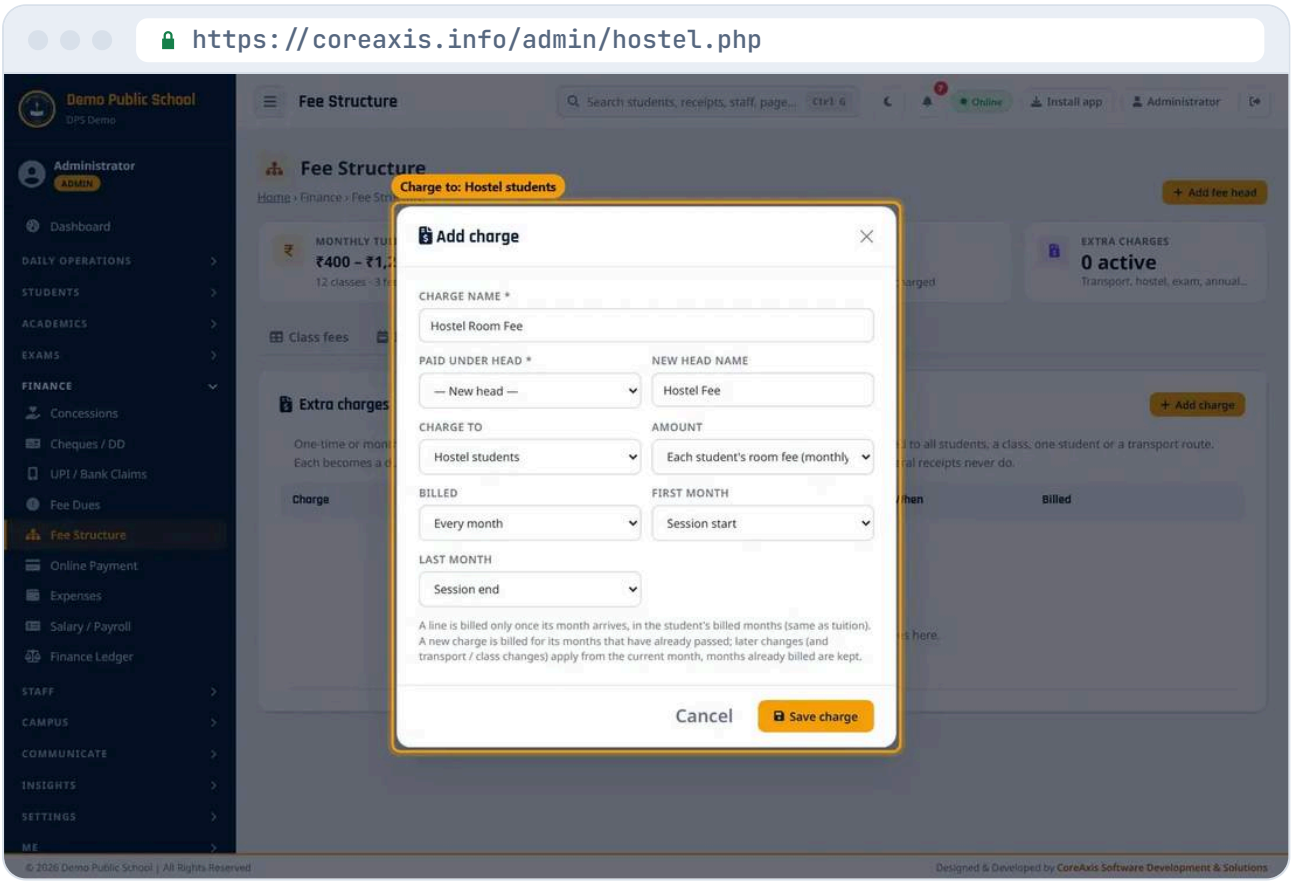


Add charge form.

2 Type the **Charge name** (Hostel Room Fee). In **Paid under head**, choose an existing head or **New head** and type **Hostel Fee**.

3 In **Charge to**, choose **Hostel students**. In **Amount**, choose **Each student's room fee (monthly)**.

4 In **Billed**, choose **Every month**. Leave **First month** at **Session start** and **Last month** at **Session end**.



Hostel charge: hostel students, each student's room fee, every month.

5 Click **Save charge** and confirm. Each hostel student is billed their own room's monthly fee from the month of allocation; the lines appear at the Fee Desk under the Hostel Fee head.

IMPORTANT A new charge is also billed for months of the session that have already passed (from each student's allocation date). Check the amount before saving.

Screen at a glance

Total Rooms / Total Capacity / Occupied / Vacant Beds	Summary of all rooms and beds.
Rooms tab	Block, Room No, Type, Capacity, Occupied (Full when no bed is free), Monthly Fee, Notes, Edit / Delete.
Allocations tab	Student, Admission No, Class, Block / Room, Allocated On, Remarks, Vacate.

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Questions

A room with students cannot be deleted.

Vacate its students first (or move them), then delete the room.

Where do hostel students see the warden's phone?

Enter the warden's name and phone in Settings › School Profile › People & Branding. It is shown to hostel students in the app.

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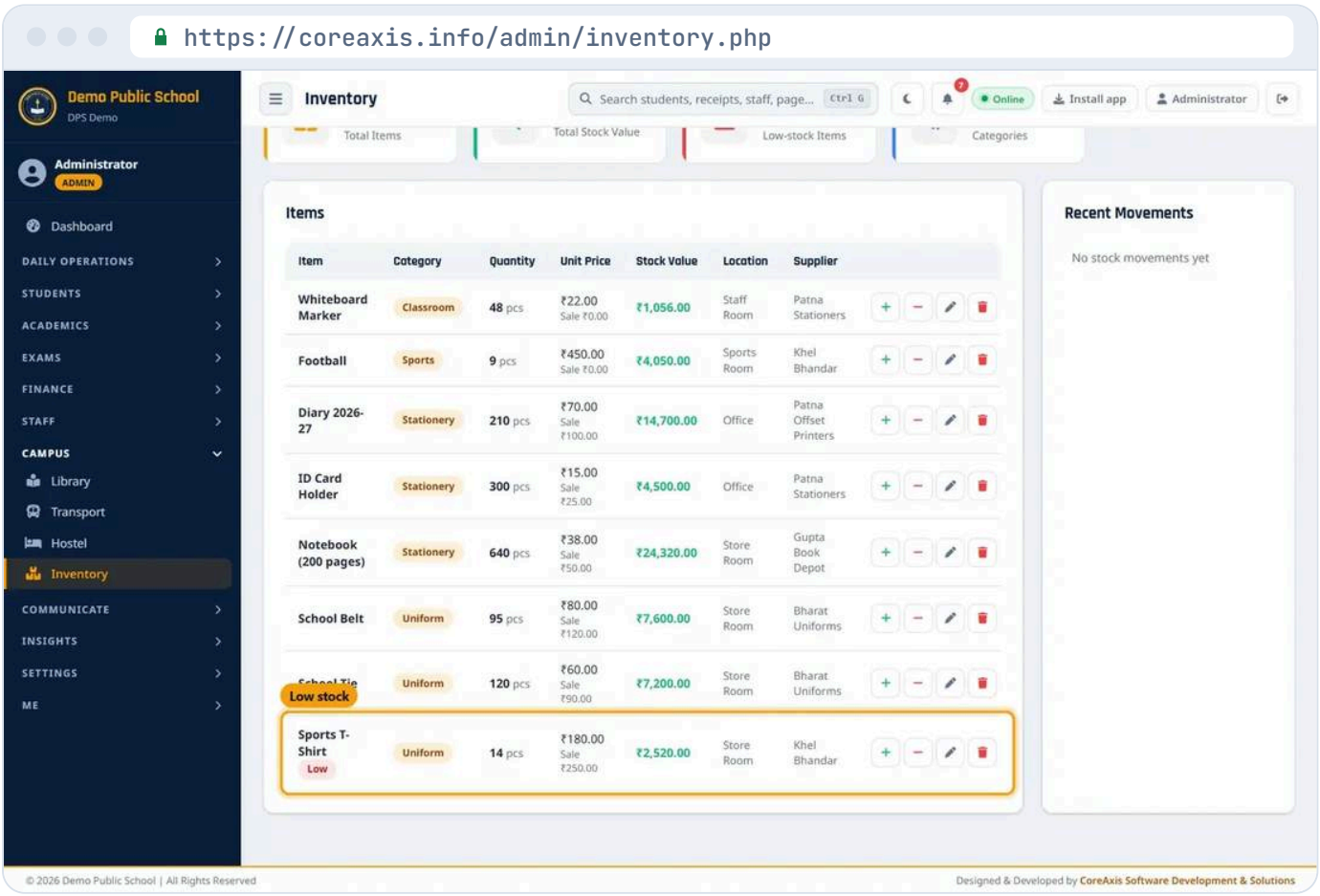
CAMPUS · CHAPTER 43

Inventory & School Store

Admin Principal Accountant MENU Campus › Inventory (Accountant: School Store)

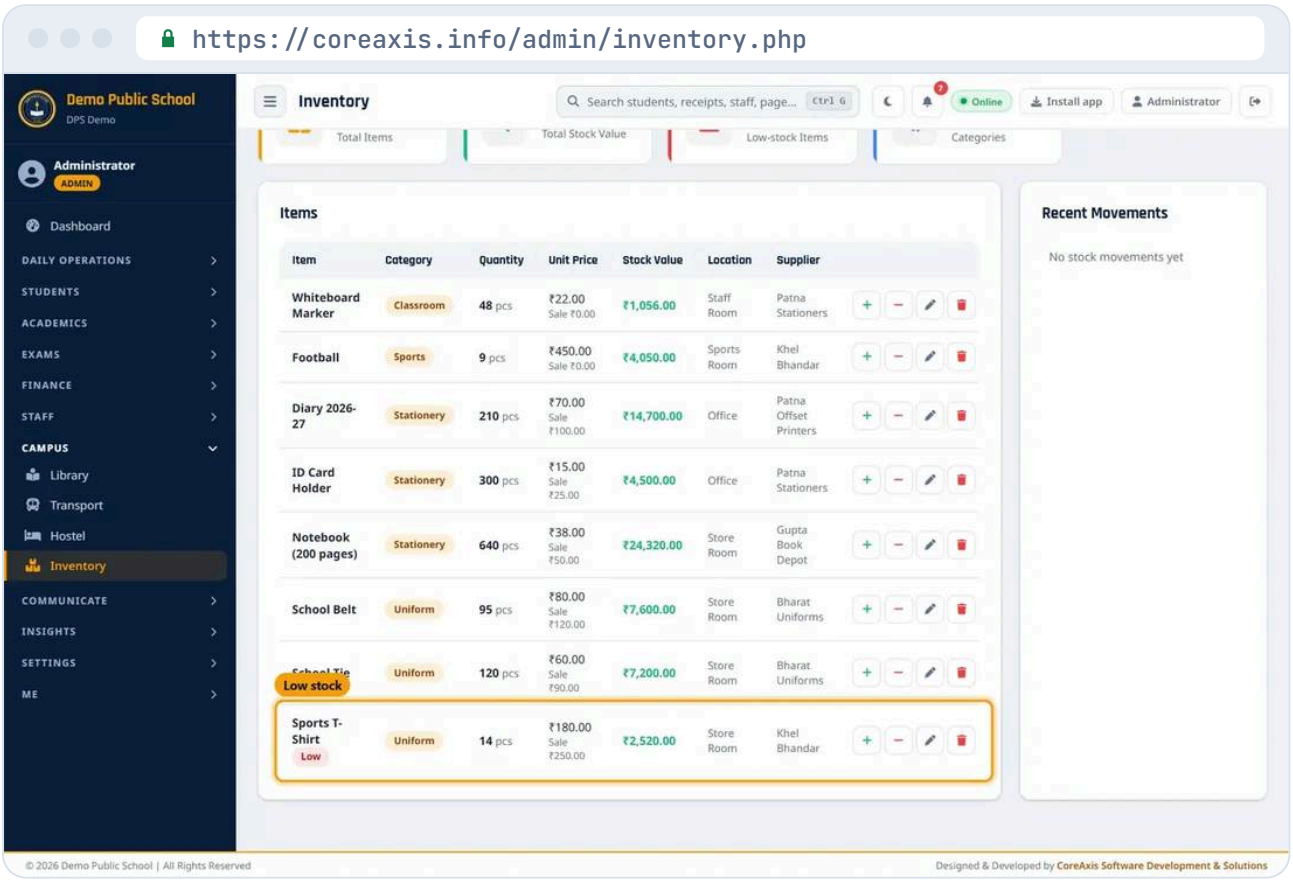
Inventory keeps every item the school holds: stationery, uniform items, sports goods, classroom supplies. Each item has a quantity, unit price, minimum stock and location; every stock in and stock out is recorded. When the **School Store** add-on is on, the same items can be sold to students (one by one or as a ready-made kit). A sale reduces stock and adds the total to the student's fee dues, which the parent pays at the Fee Desk or online.



Inventory & School Store — Demo Public School

Add an item (example: Geometry Box)

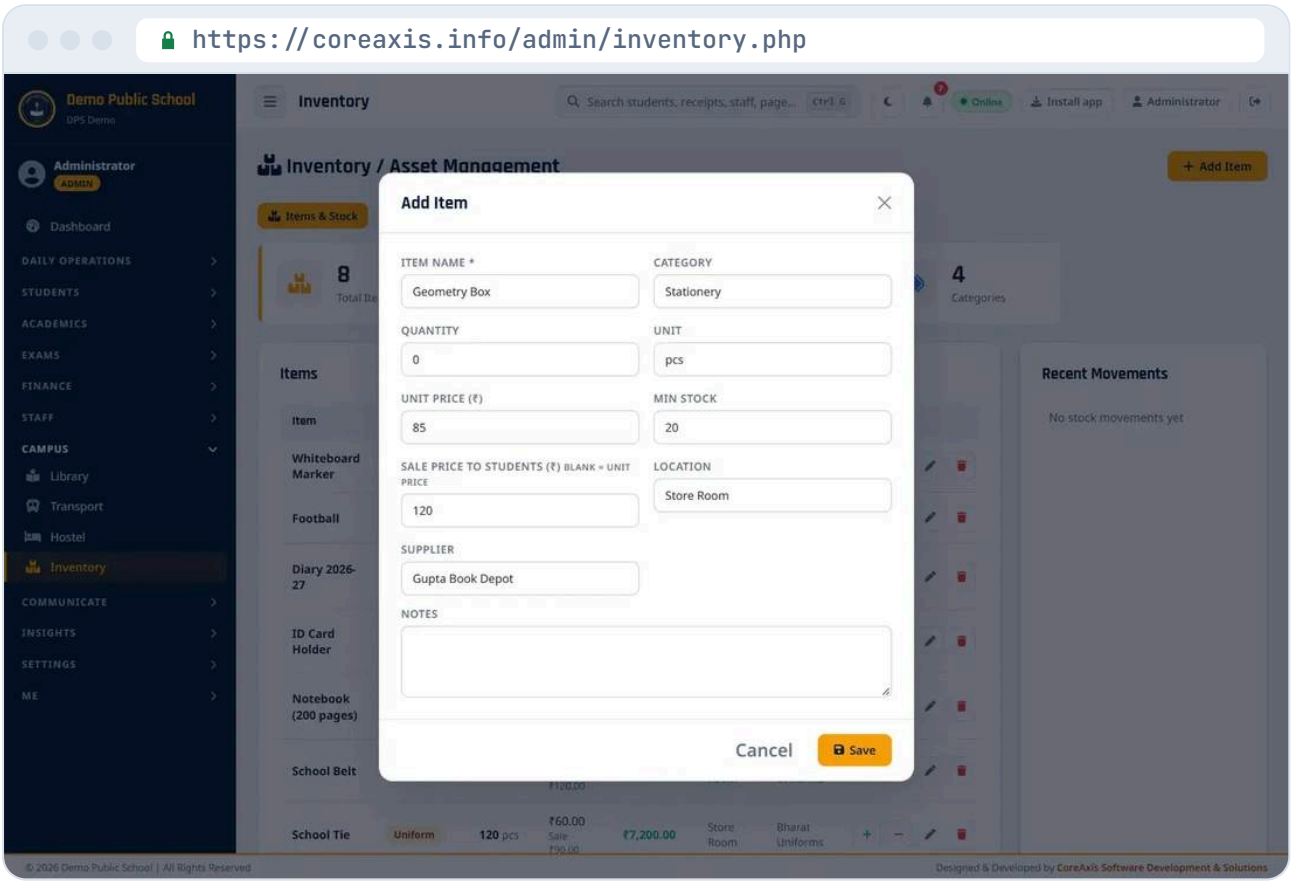
1. Open **Campus › Inventory**. The **Items & Stock** tab lists all items; items at or below their minimum show a red **Low** badge.



Items with stock value; Sports T-Shirt is low.

2. Click **Add Item**.
3. Type the **Item Name** (Geometry Box) and **Category** (Stationery). Fill **Quantity**, **Unit** (pcs) and **Unit Price (₹)** (85).
4. Set **Min Stock** (20): when stock falls to this level the item is marked Low.
5. With the School Store on, fill **Sale Price to Students (₹)** (120). Leave it blank to sell at the unit price.

6 Fill **Location** (Store Room), **Supplier** (Gupta Book Depot) and **Notes**, then click **Save**.

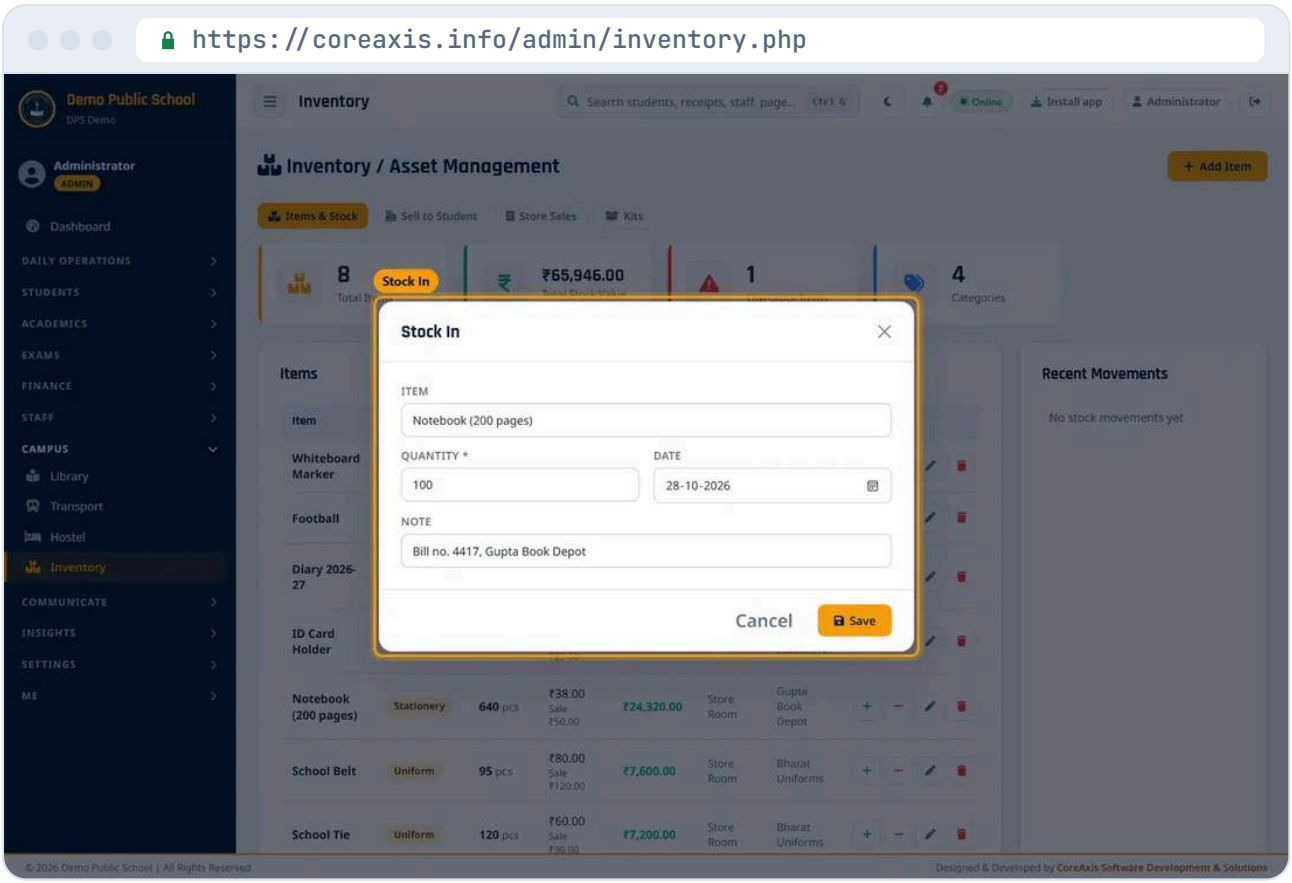


Add Item form.

Record stock in and stock out (example: 100 notebooks received, 2 footballs issued)

1 On the item's row, click the **+** button (Stock In).

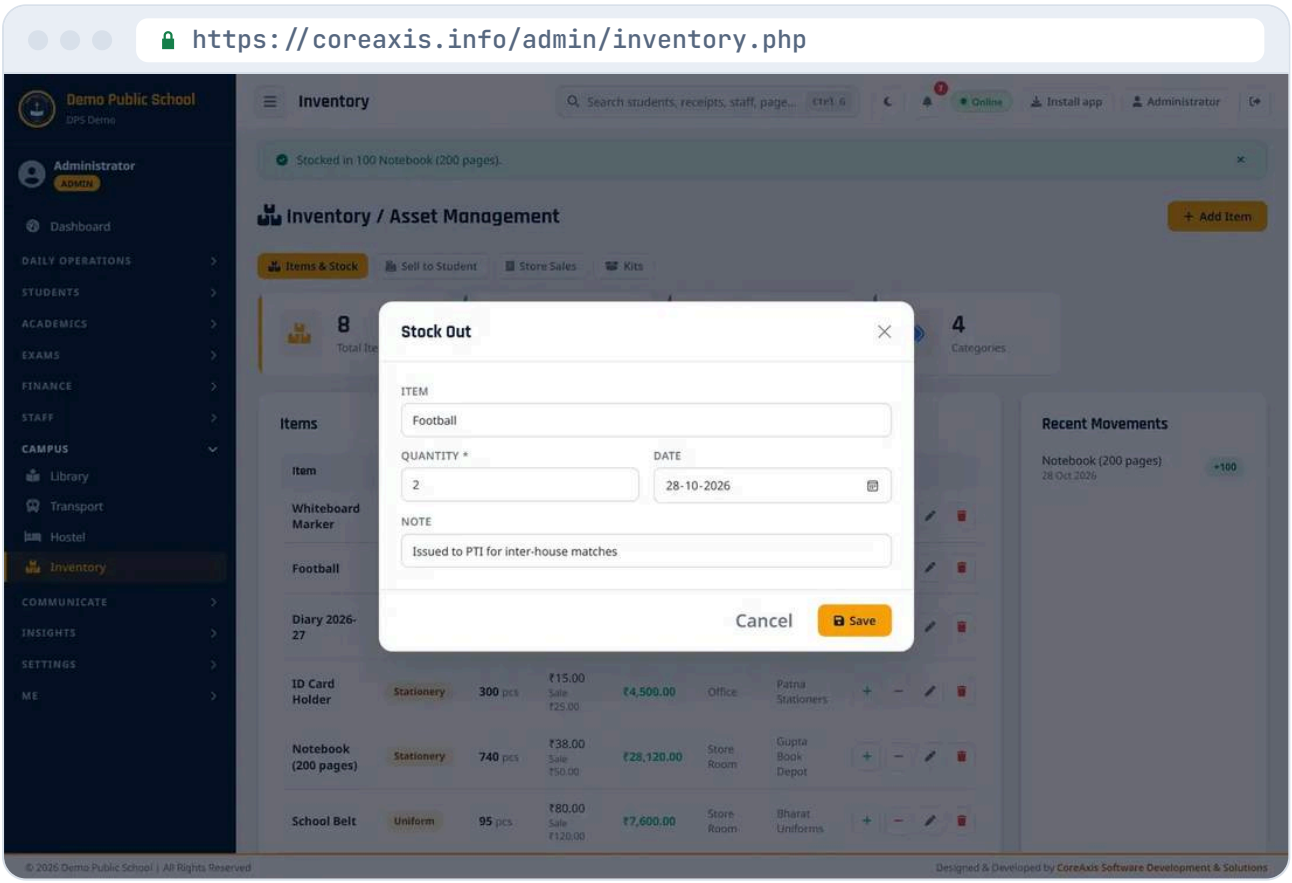
2 Type the **Quantity** (100), check the **Date** and add a **Note** (Bill no. 4417, Gupta Book Depot).



Stock In for Notebook (200 pages).

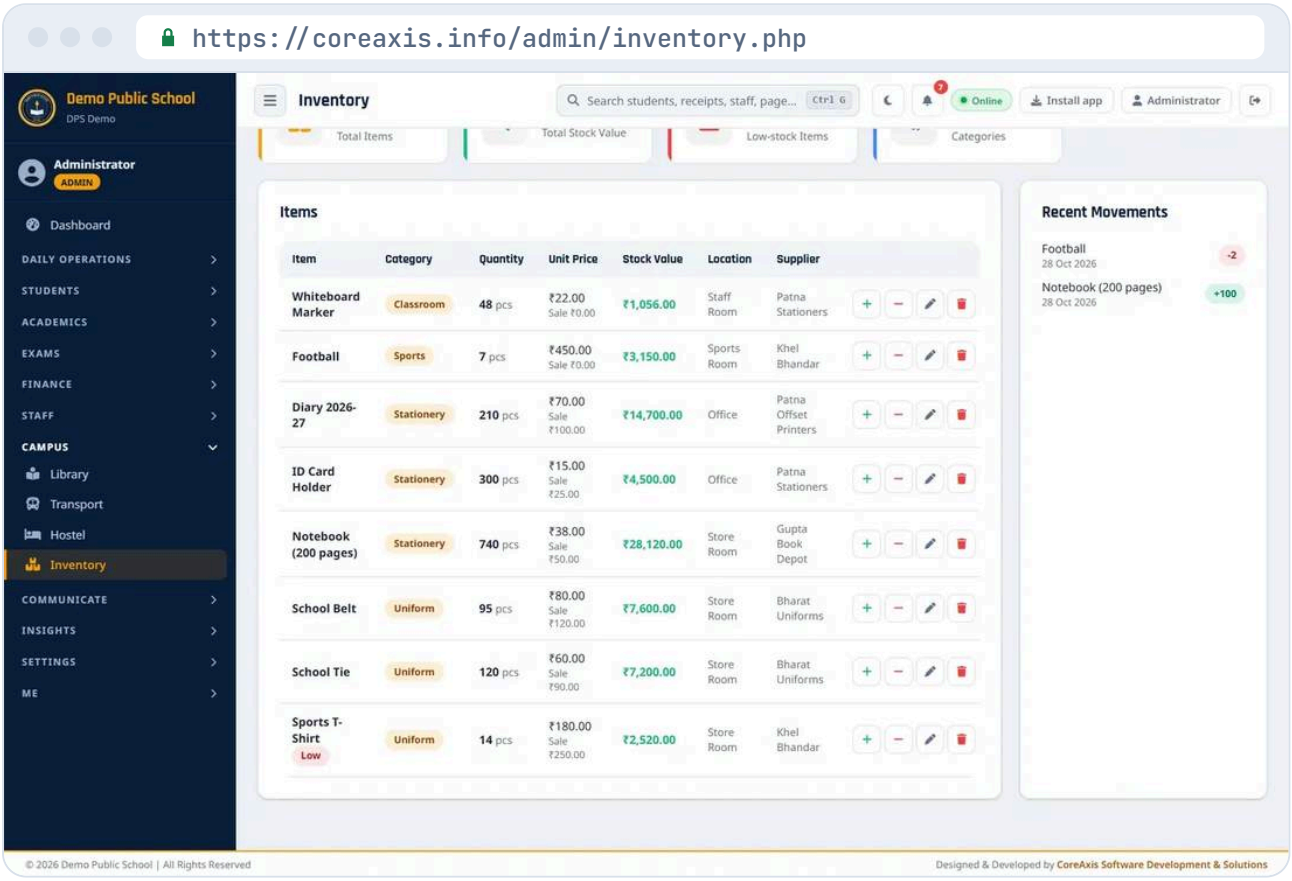
3 Click **Save**. The message **Stocked in 100 Notebook (200 pages).** appears and the quantity goes from 640 to 740.

4 For items given out, click the **−** button (Stock Out), type the quantity (2 footballs) and a note (Issued to PTI for inter-house matches), and click **Save**.



Stock Out for Football.

5 **Recent Movements** on the right lists each stock in (+) and stock out (−).



Recent Movements: +100 notebooks, −2 footballs.

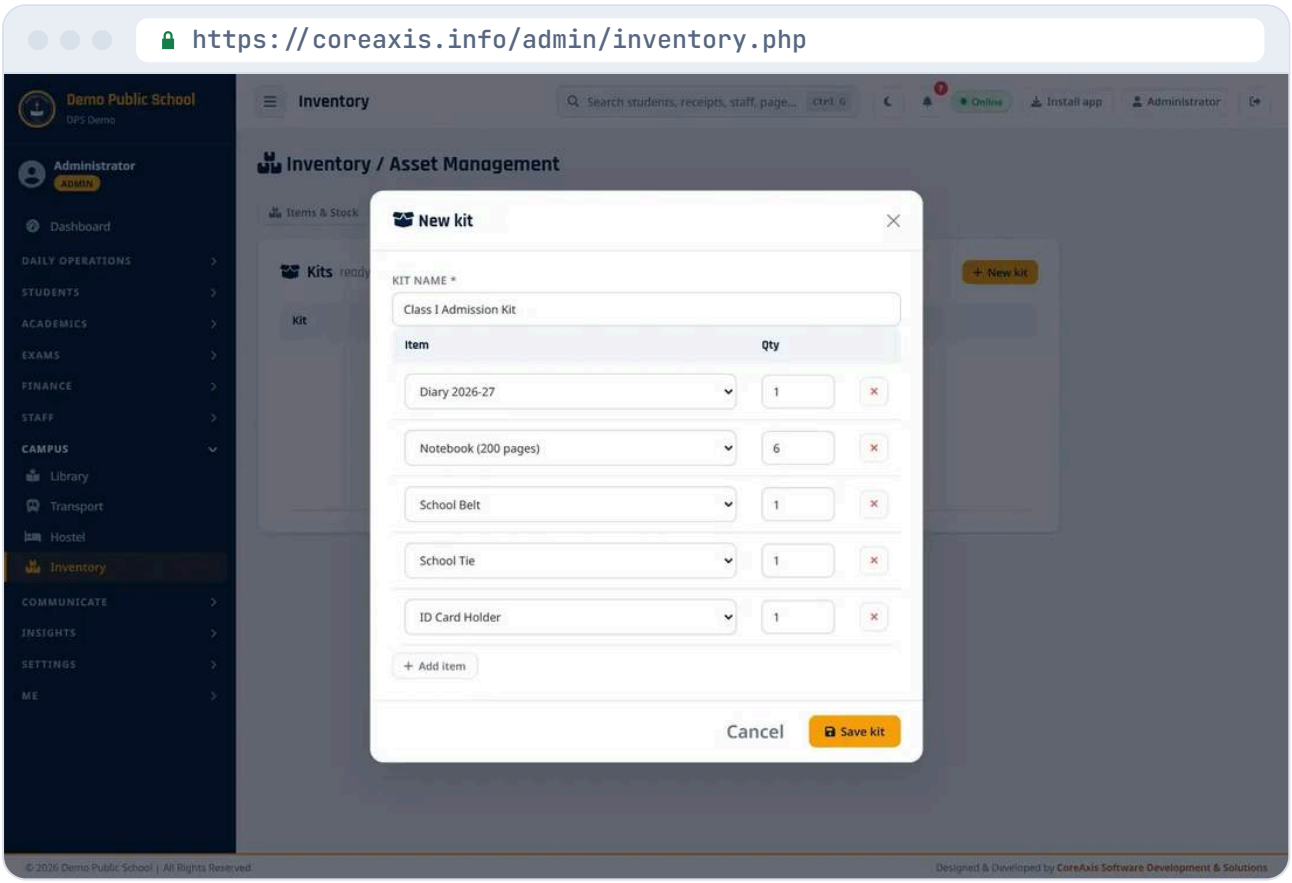
TIP Stock can never go below zero; a stock out larger than the quantity is refused.

School Store: make a kit (example: Class I Admission Kit)

1 Open the **Kits** tab and click **New kit**.

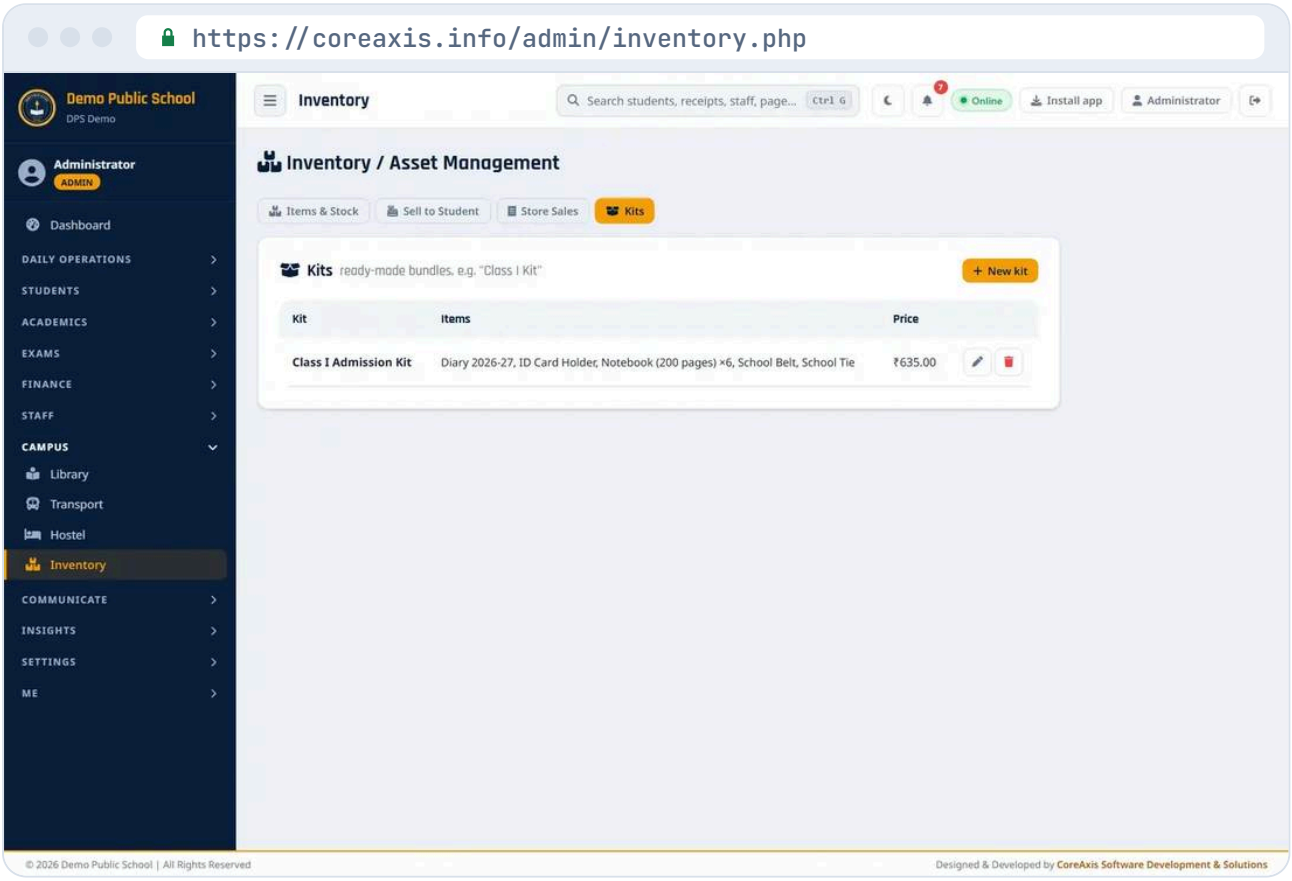
2 Type the **Kit name** (Class I Admission Kit).

3 Click **Add item** for each line and choose the item and quantity: Diary 2026-27 × 1, Notebook (200 pages) × 6, School Belt × 1, School Tie × 1, ID Card Holder × 1.



New kit with five items.

4 Click **Save kit** and confirm. The kit is listed with its items and price.

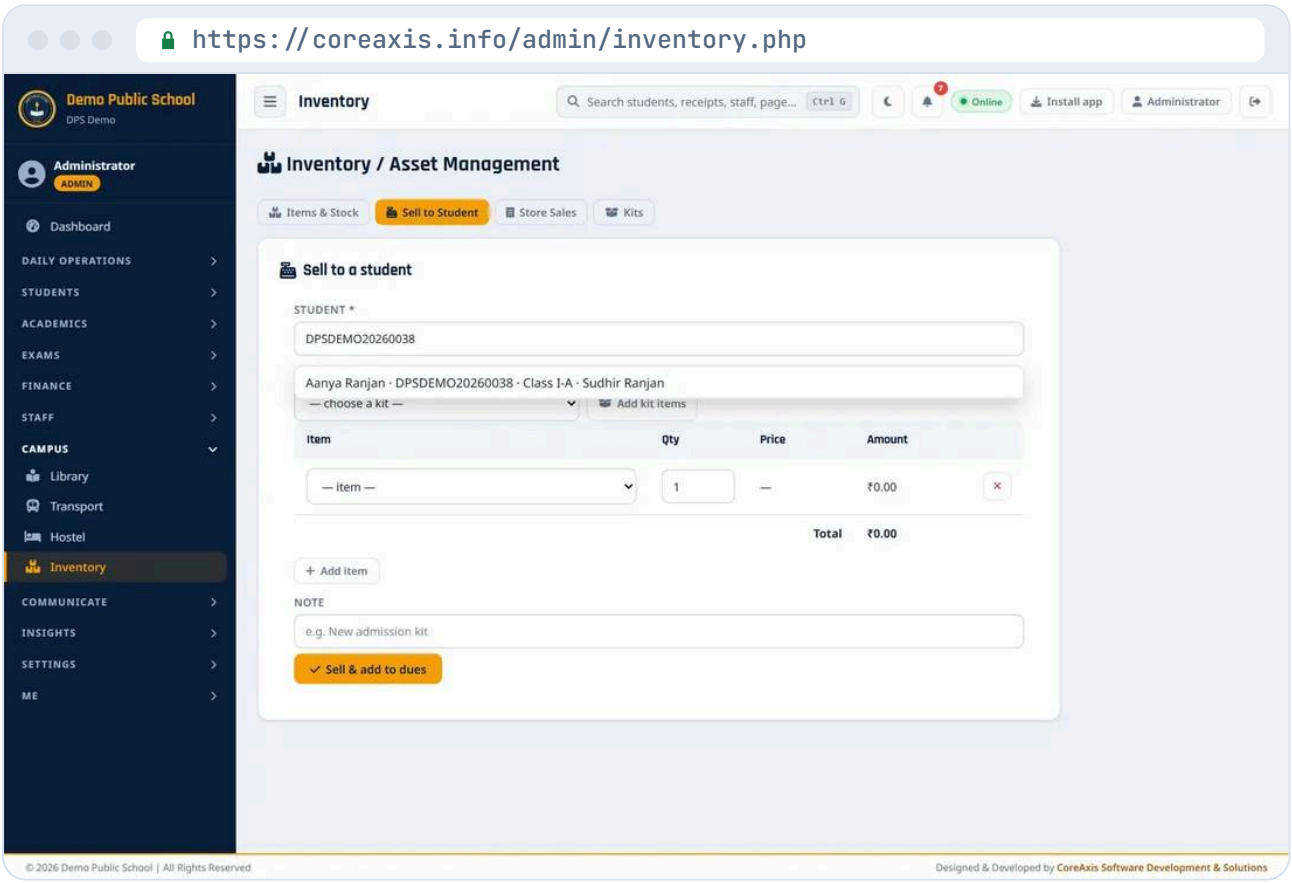


Kits list.

School Store: sell to a student (example: Aanya Ranjan, Class I-A, ₹635 added to dues)

1 Open the **Sell to Student** tab (Accountant: **School Store**).

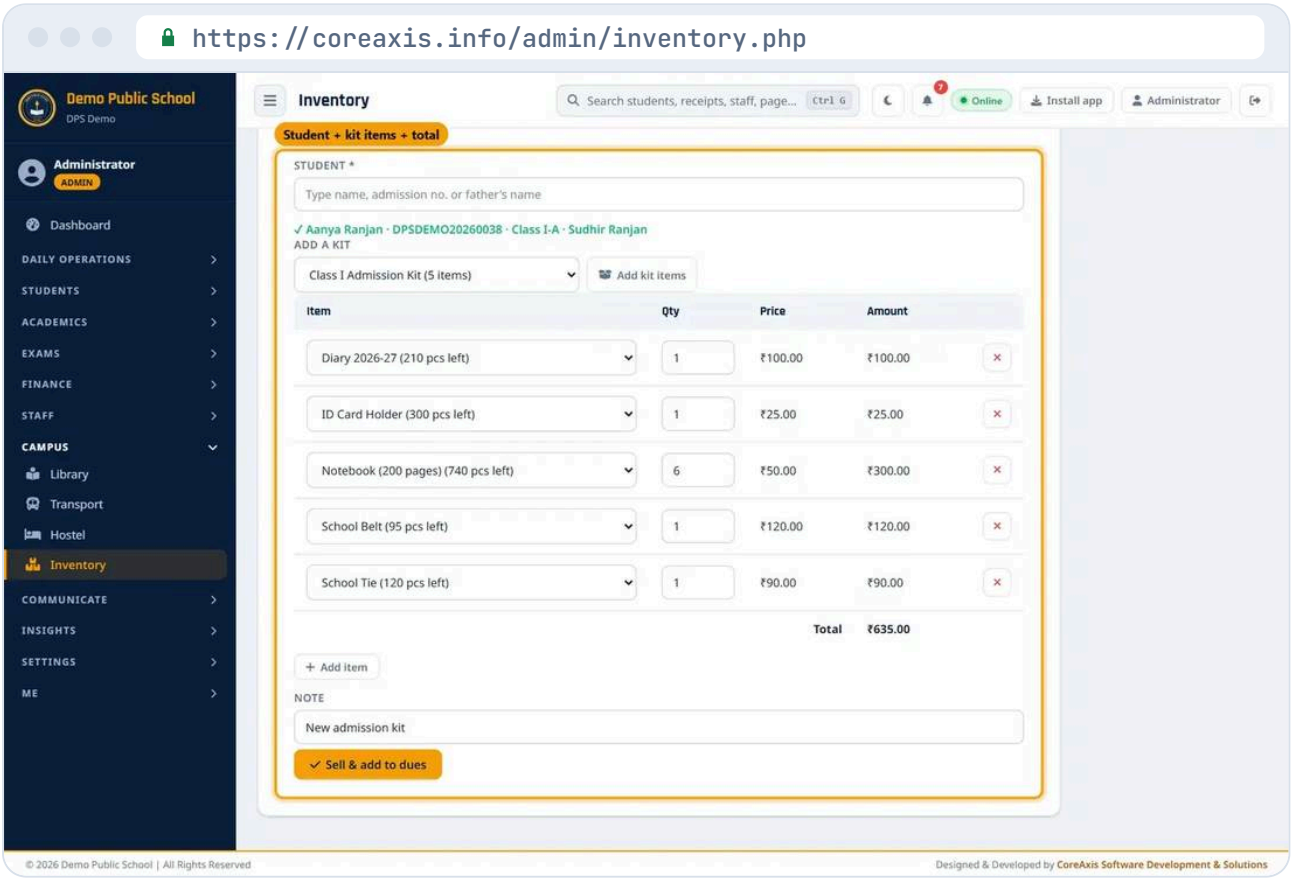
2 In **Student**, type the name, admission number or father's name and click the student in the list. A green tick line confirms the choice.



Search by admission number.

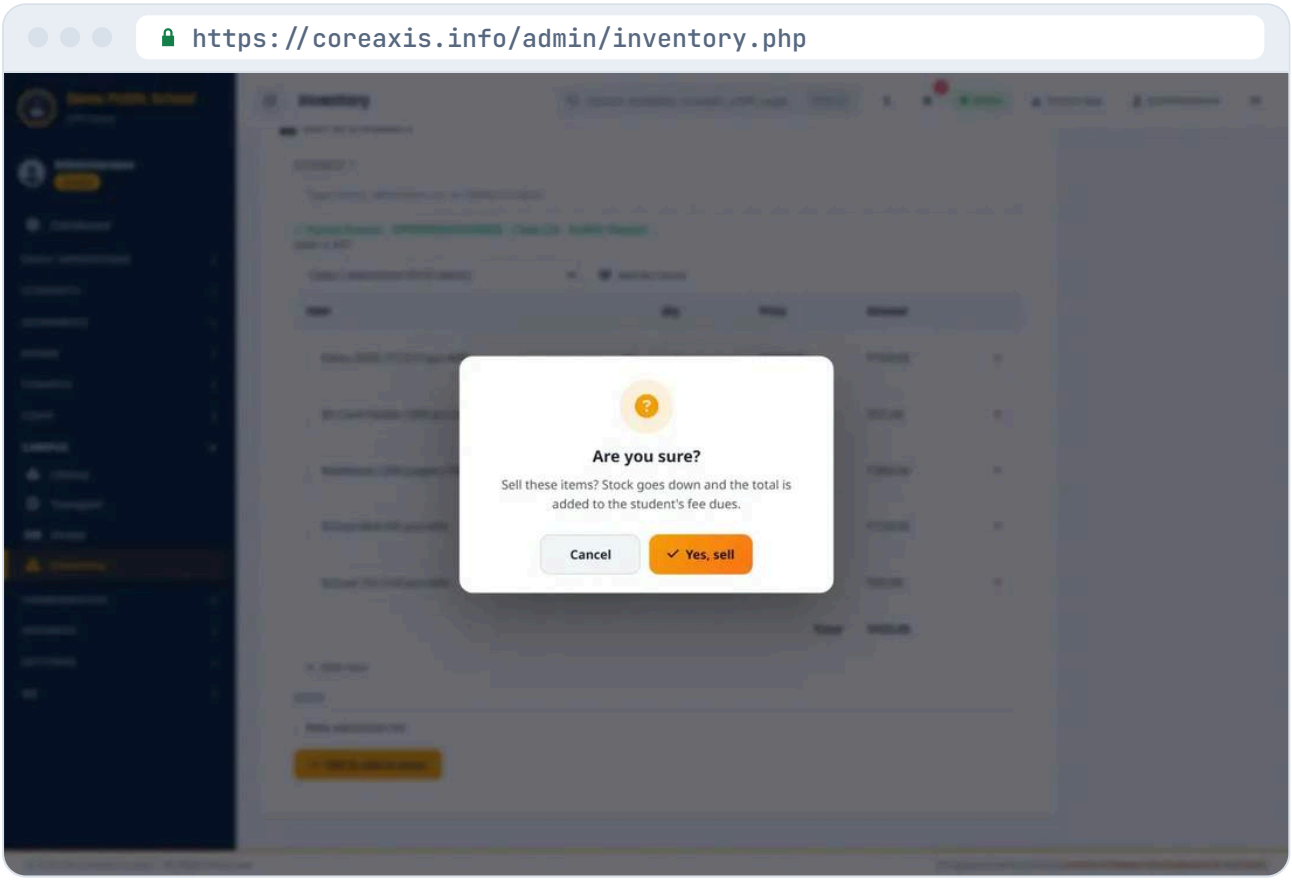
3 In **Add a kit**, choose **Class I Admission Kit** and click **Add kit items**. Use **Add item** for anything extra, and change quantities if needed.

4 Check the **Total** (₹635.00) and type a **Note** (New admission kit).



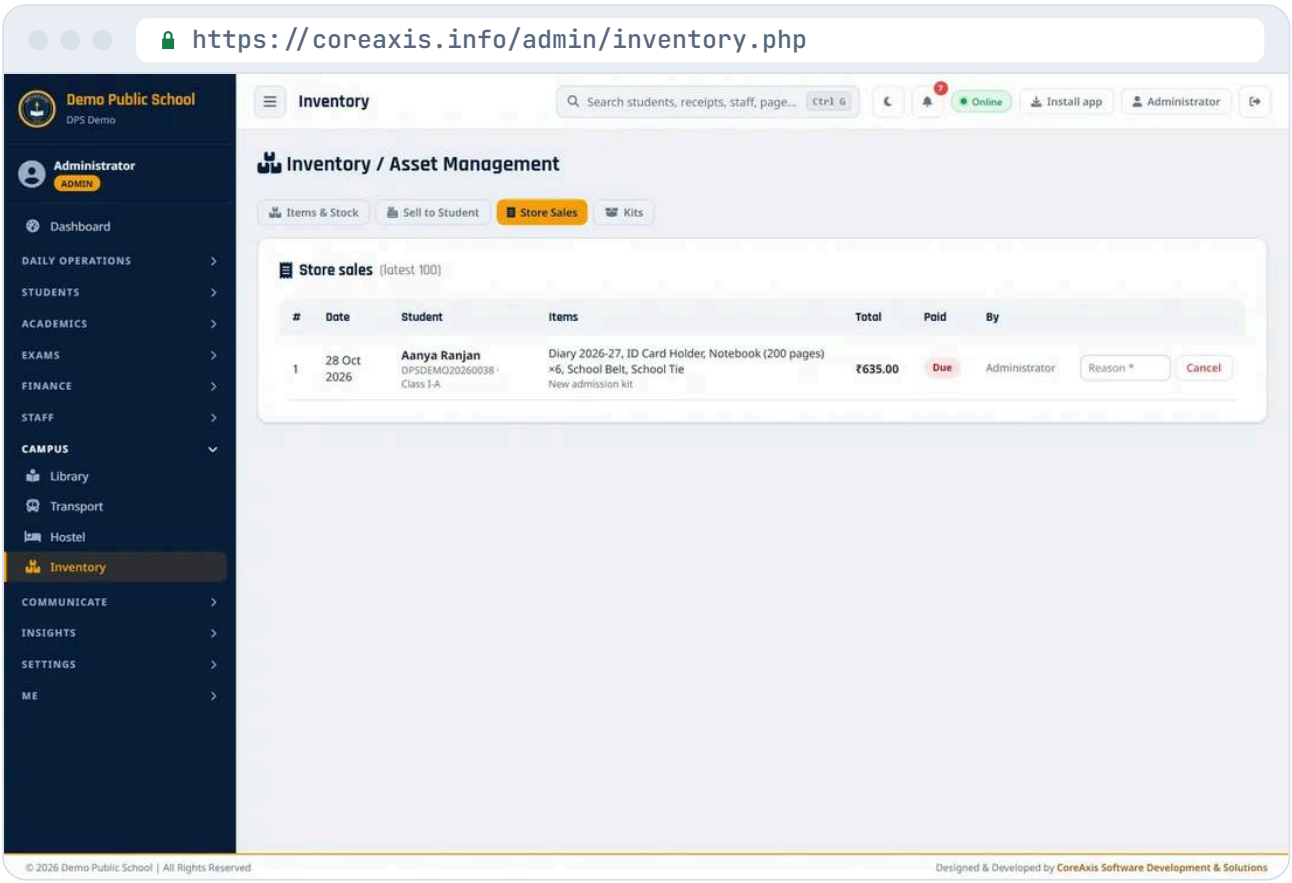
Student, kit lines, prices and total.

5 Click **Sell & add to dues** and confirm **Yes, sell**.



Stock goes down and the total is added to the student's fee dues.

6 The message **Sold to Aanya Ranjan — ₹635.00 added to their fee dues (School Store)** appears. The sale is listed in **Store Sales** as **Due** until paid.



Store Sales register.

TIP The parent pays the store amount with the fees at the Fee Desk (head: School Store) or online.

TIP To undo a wrong sale, click **Cancel** on its row in **Store Sales** and give a reason. Items go back to stock and the charge is removed from the dues.

Screen at a glance

Total Items / Total Stock Value / Low-stock Items / Categories	Stock value = quantity × unit price, added up.
Items table	Item, Category, Quantity with unit, Unit Price and Sale price, Stock Value, Location, Supplier, and buttons + (Stock In), − (Stock Out), Edit, Delete.

Sell to Student	Student search, Add a kit, item lines with Qty / Price / Amount, Total, Note, Sell & add to dues.
Store Sales	Latest 100 sales: date, student, items, total, Paid / Due, by whom, Cancel.
Kits	Ready-made bundles with items, price, Edit and Delete.

Questions

I do not see Sell to Student, Store Sales or Kits.

The School Store is an add-on. Ask the CoreAxis platform team to turn it on for your school.

An item cannot be picked in the sell list.

Items with no sale price and no unit price are disabled. Edit the item and set a Sale Price to Students.

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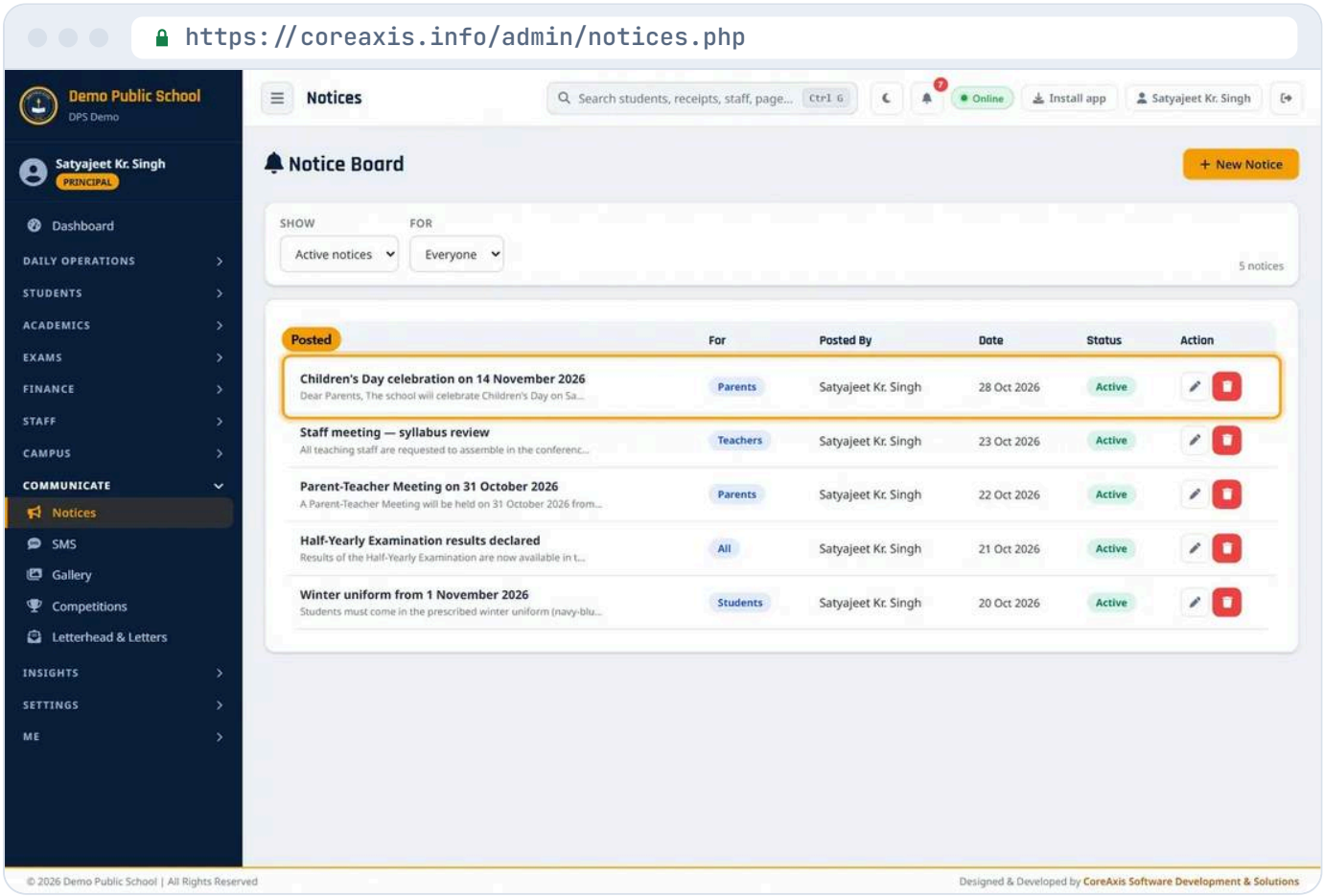
COMMUNICATE · CHAPTER 44

Notices

Admin Principal Teacher MENU Communicate › Notices (Teacher: Notices)

The Notice Board is where the school posts circulars and announcements. Each notice is addressed to **All**, **Teachers**, **Students** or **Parents**, and appears on the dashboards and in the student / parent portal for that audience. If SMS is set up, a short SMS can be sent with the notice. For a formal printed circular on the letterhead, use **Letterhead & Letters**.

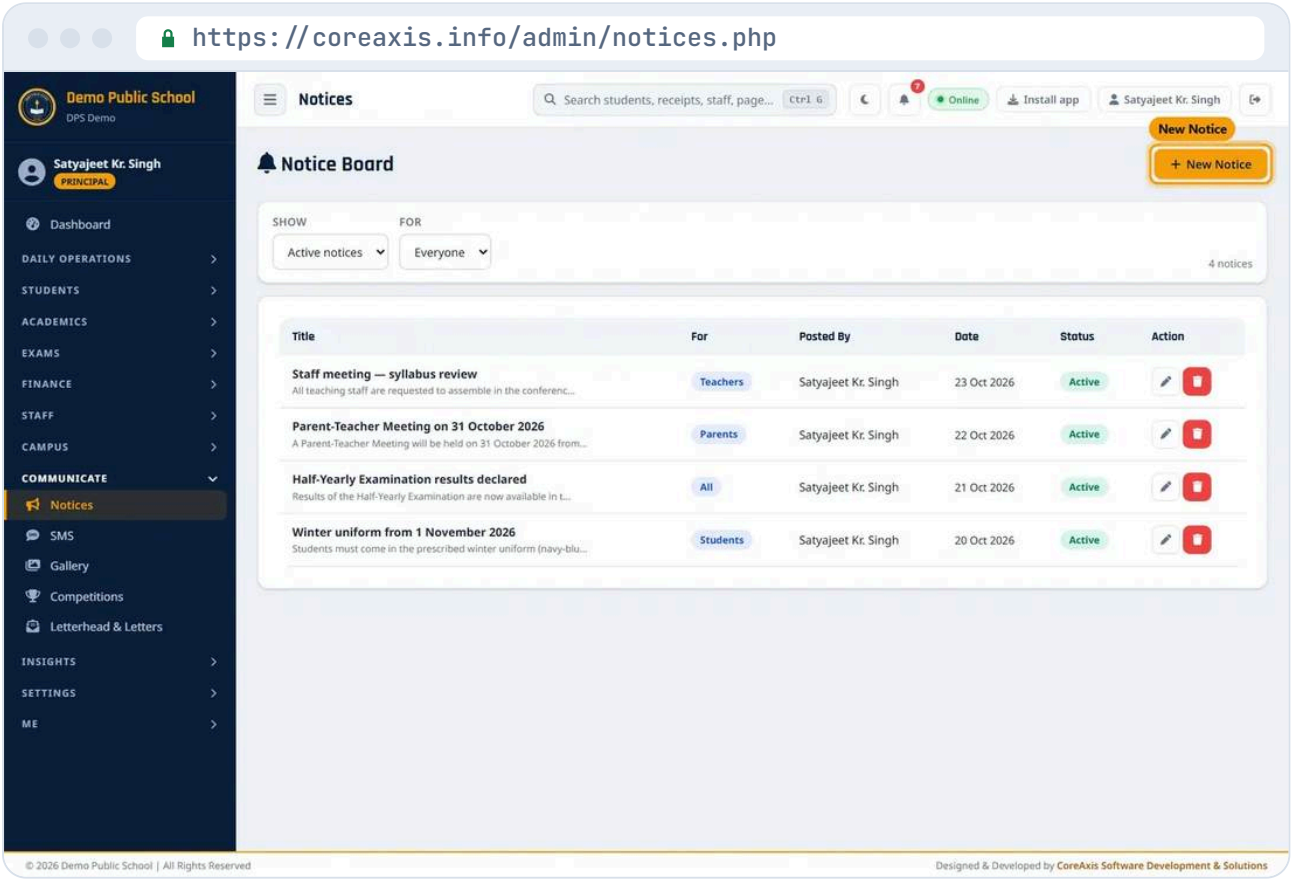


Notices — Demo Public School

Post a notice to parents (example: Children's

Day celebration on 14 November 2026)

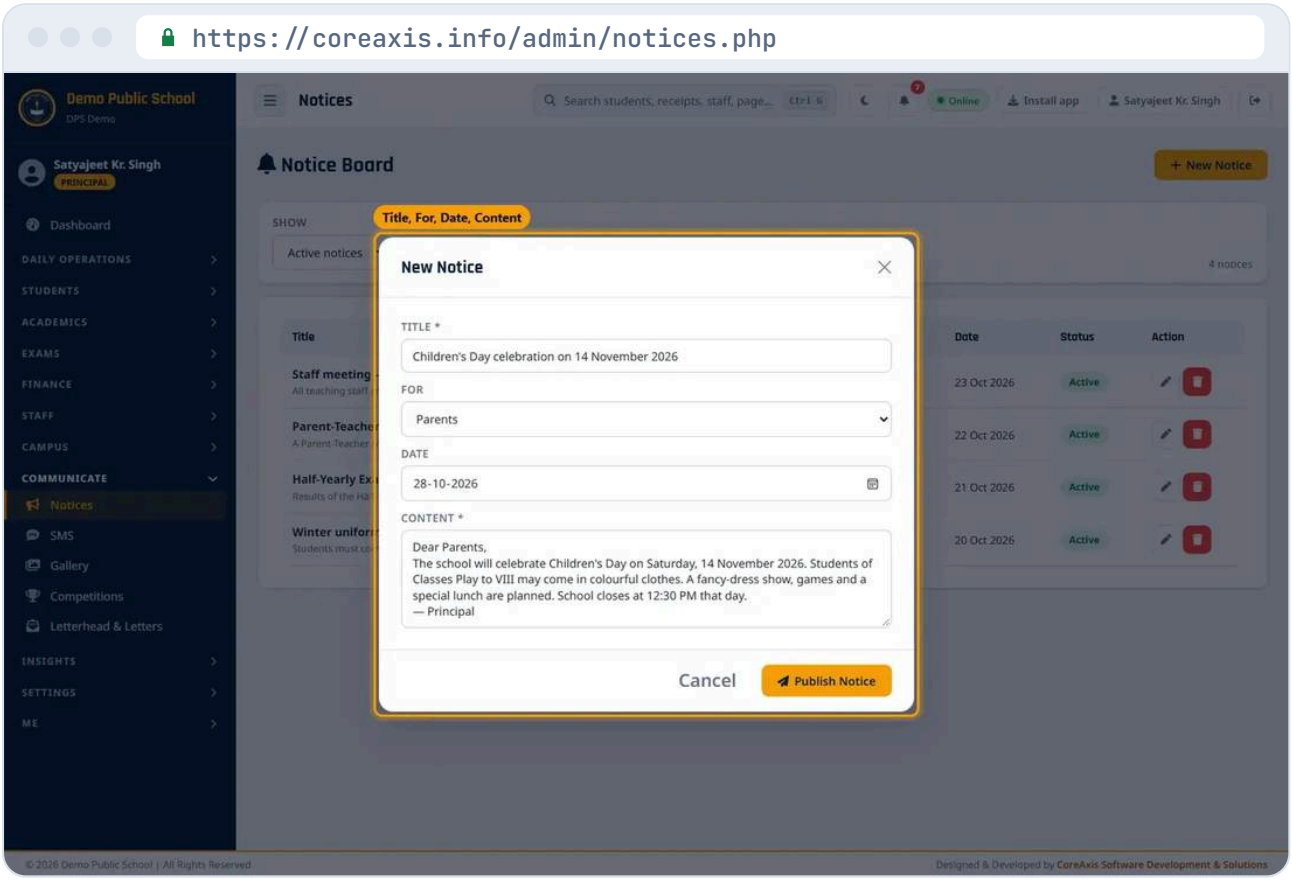
1. Open **Communicate › Notices** and click **New Notice**.



Notice Board with active notices.

2. Type the **Title** (Children's Day celebration on 14 November 2026).
3. In **For**, choose who should see it: **Parents**. Choose **All** for everyone, **Teachers** for staff only, or **Students**.
4. Check the **Date** (today by default).

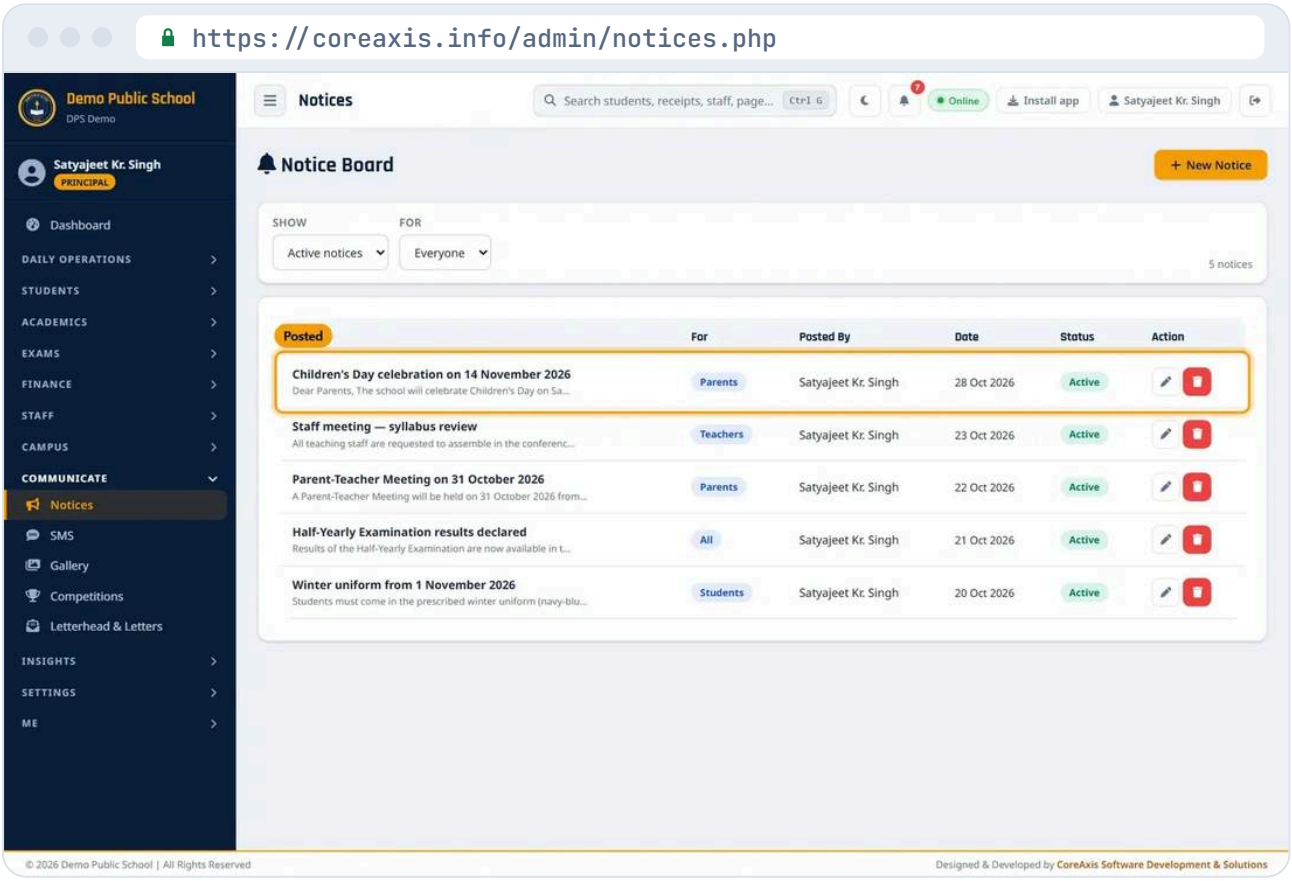
5 Type the **Content**. Line breaks are kept.



New Notice form.

6 If SMS is enabled and allowed with notices, a tick box **Also send as SMS to this notice's audience** appears (Teachers go to teaching staff; Students / Parents go to parents; All goes to both). Tick it only when the notice is urgent; each SMS costs credit.

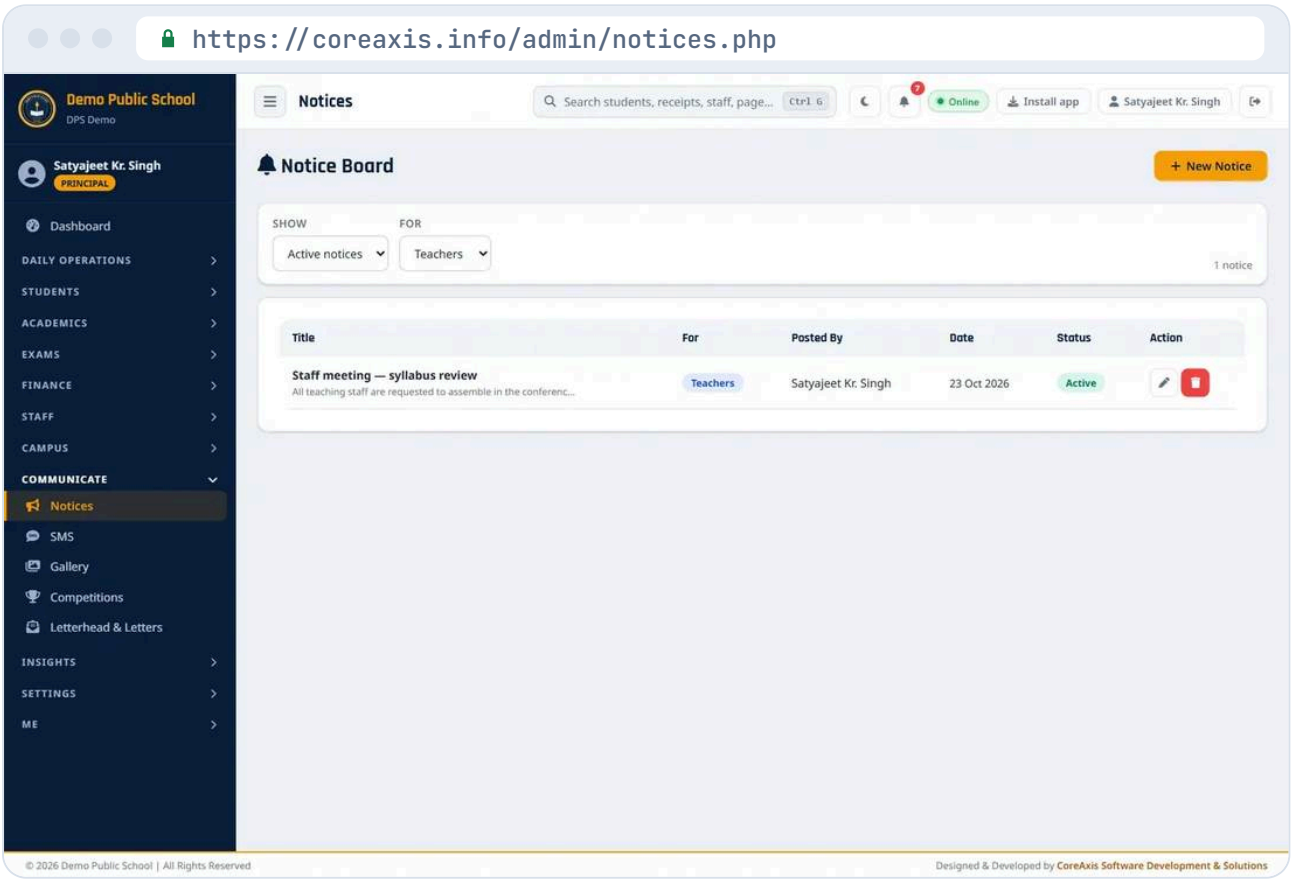
7 Click **Publish Notice** and confirm. The notice is at the top of the list as **Active**.



The new notice for Parents.

Find, edit or remove a notice

1. Use **Show** (Active notices, Removed, All) and **For** (Everyone, All, Teachers, Students, Parents) to filter the list.



Only notices for Teachers.

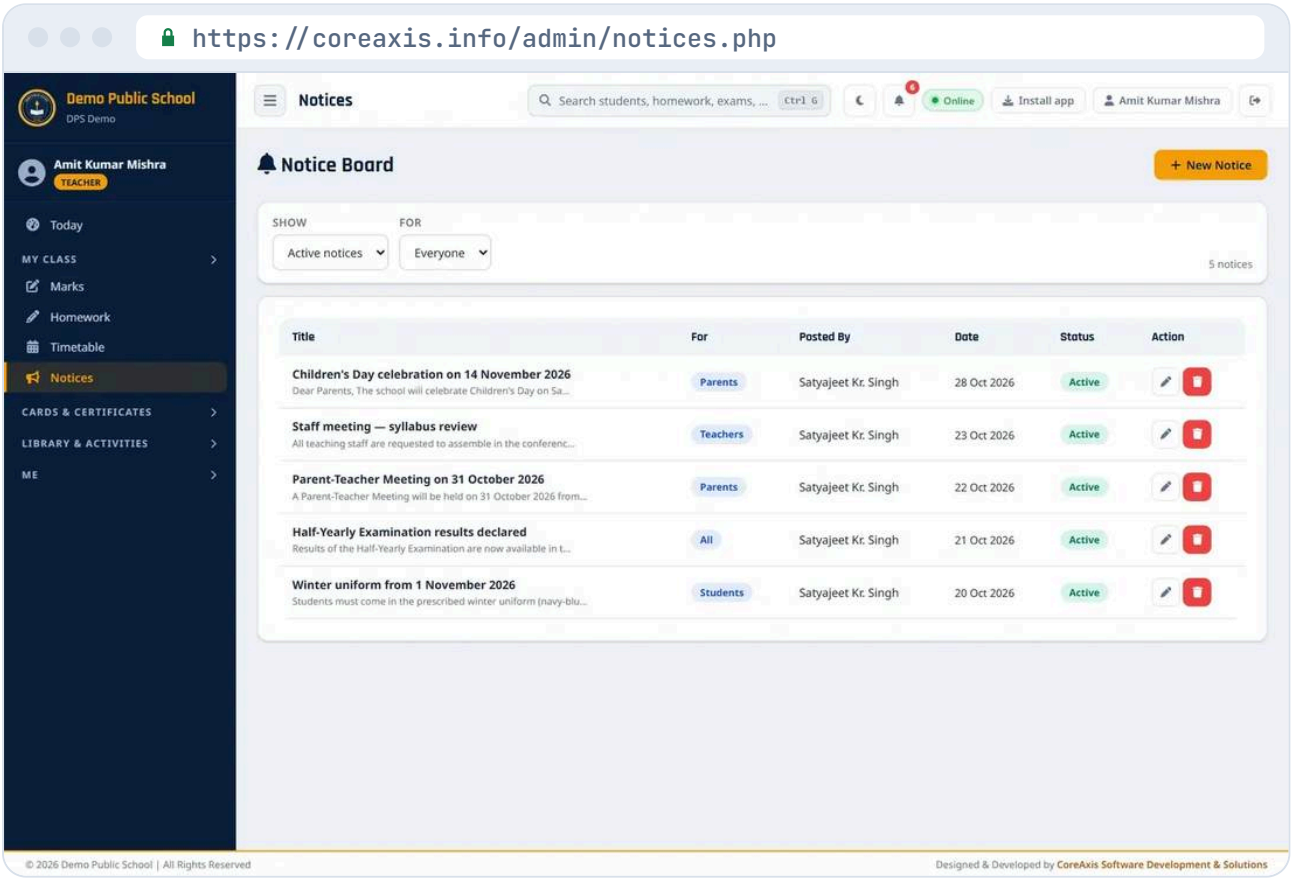
2. Click the pencil icon to correct a notice and save again.

3. Click the red icon (**Remove**) to take a notice off the board. Removed notices stay under **Show › Removed**.

Teachers and notices

Teachers open **Notices** from their menu. They see the same board and can post a notice with **New Notice**, for example a class test reminder for parents.

1 Notice Board signed in as a teacher.



Teacher view of the Notice Board.

Screen at a glance

Title	Notice heading, with the first line of the content below.
For	Audience: All, Teachers, Students or Parents.
Posted By / Date	Who posted it and the notice date.
Status	Active (shown) or Removed.
Action	Edit and Remove.

Questions

Do parents get a notification?

Parents see the notice in the parent portal and app. They get an SMS only if you tick the SMS box and SMS is set up.

Can I post a notice for one class only?

Notices go to an audience (All, Teachers, Students, Parents), not to one class. To reach one class's parents, use SMS › Send SMS › Specific Class, or give the information as homework for that class.

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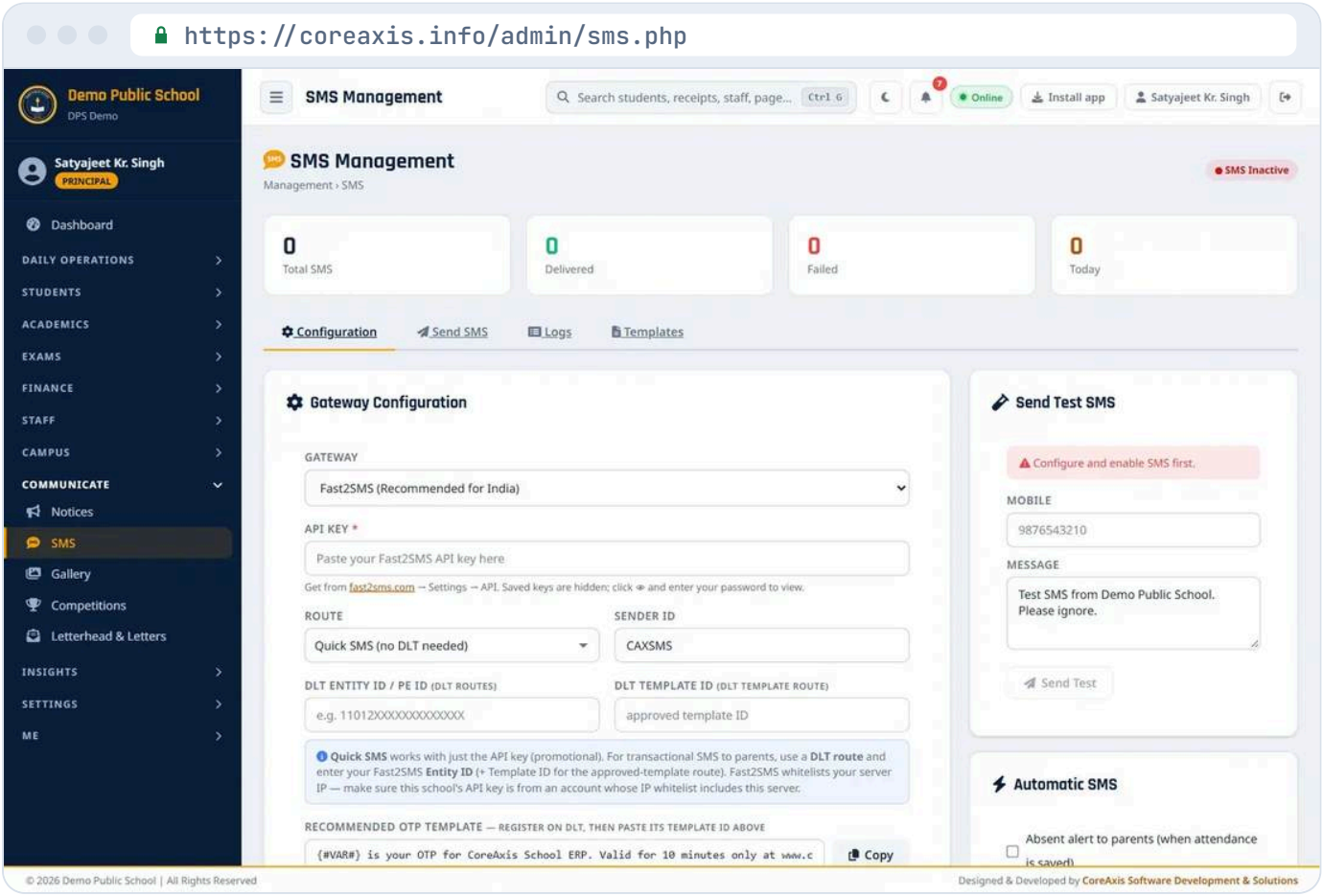
COMMUNICATE · CHAPTER 45

SMS

Admin Principal MENU Communicate › SMS

CoreAxis sends SMS through the school's own Fast2SMS account (or another HTTP SMS gateway). Once the gateway is saved and enabled, the app can send automatic SMS (absent alert, fee receipt, welcome on admission, leave decisions) and you can send your own messages to a list of numbers, a class, all students' parents or all staff. Every SMS is written to the log. SMS credit is paid to the gateway provider, not to CoreAxis. In the demo school SMS is not set up, so the page shows **SMS Inactive**.

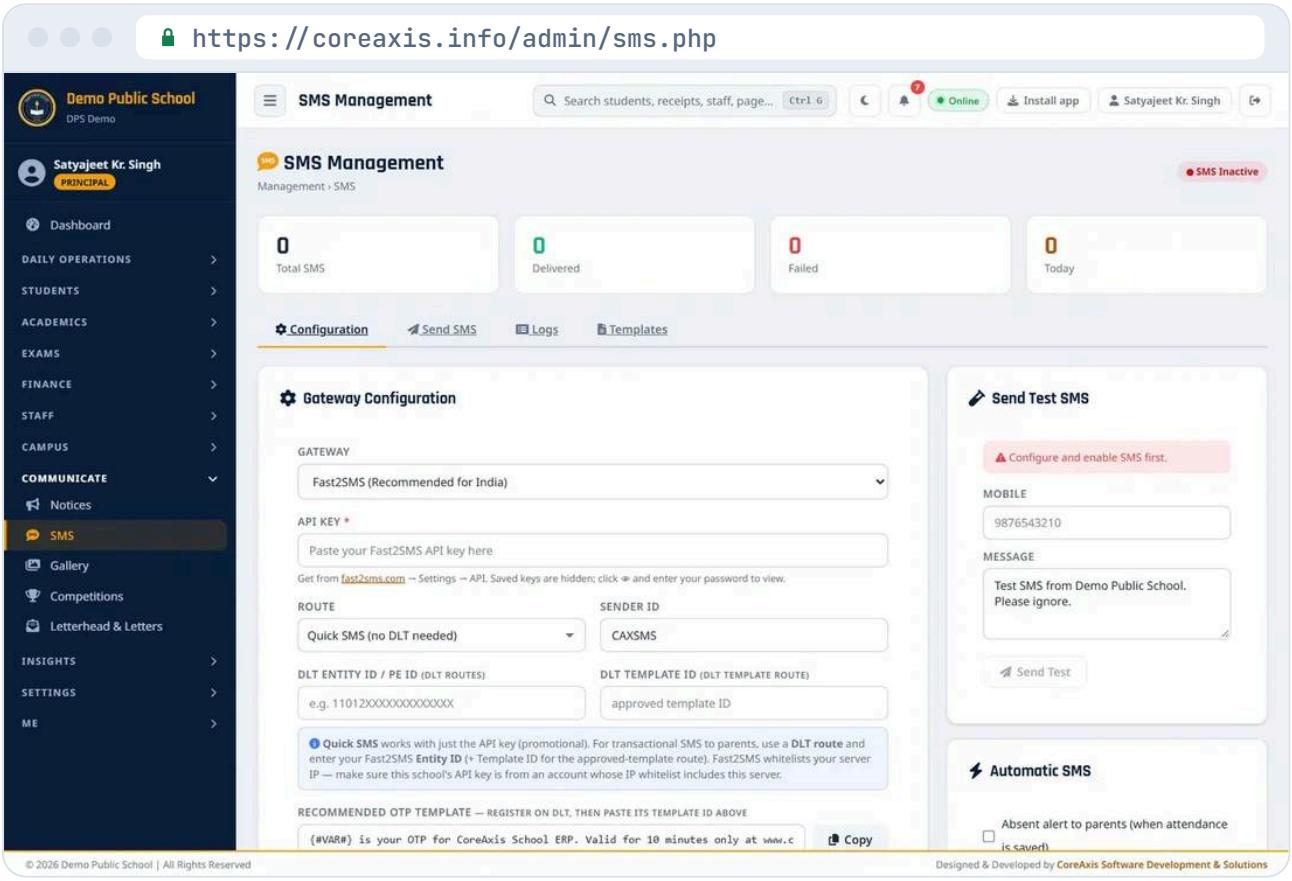


SMS — Demo Public School

Set up the SMS gateway (Configuration tab)

Do this once. You need a Fast2SMS account; for messages to parents, a DLT registration (Entity ID and approved templates) is also needed by Indian telecom rules.

1 Open **Communicate › SMS**. The **Configuration** tab opens.



Gateway Configuration and Send Test SMS.

2 In **Gateway**, keep **Fast2SMS (Recommended for India)**, or choose **Generic HTTP API** and type the **API URL** with {key}, {mobile} and {message} in it.

3 Paste the **API Key** from fast2sms.com › Settings › API. A saved key is hidden; click the eye icon and enter your password to see it.

4 Choose the **Route**: **Quick SMS (no DLT needed)** for testing; **DLT — approved template (Template ID)** or **DLT — custom text (Entity ID only)** for messages to parents.

5 Fill **Sender ID**, **DLT Entity ID / PE ID** and, for the template route, **DLT Template ID**. The **Recommended OTP template** box has text you can register on the DLT portal (click **Copy**).

6 Tick **Enable SMS Service** and click **Save Configuration**.

7 Under **Send Test SMS**, type your own **Mobile** number and click **Send Test** to check delivery.

TIP Fast2SMS allows only whitelisted server IPs. If tests fail, add the CoreAxis server IP to your Fast2SMS IP whitelist.

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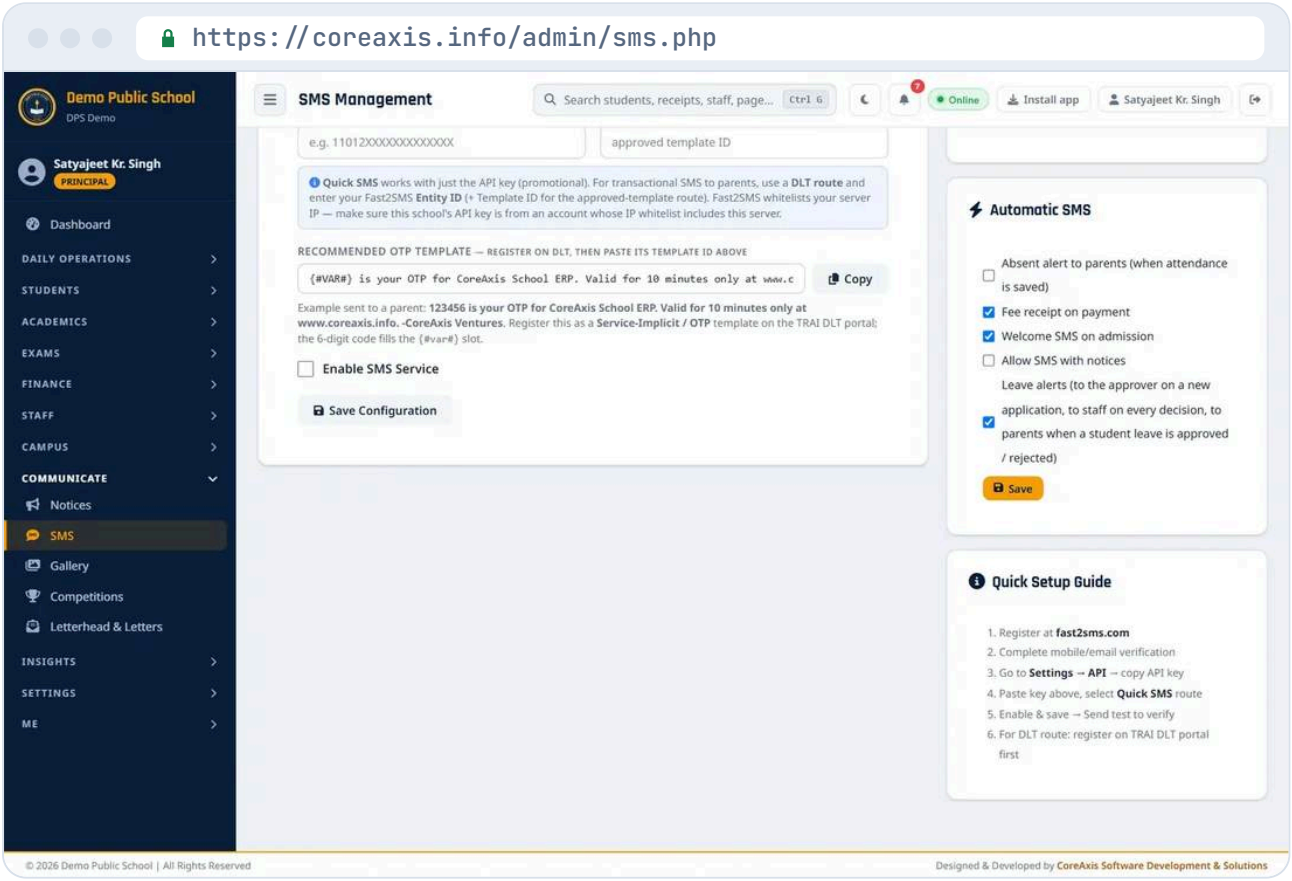
Choose automatic SMS

1 On the **Configuration** tab, find **Automatic SMS** on the right.



Automatic SMS switches.

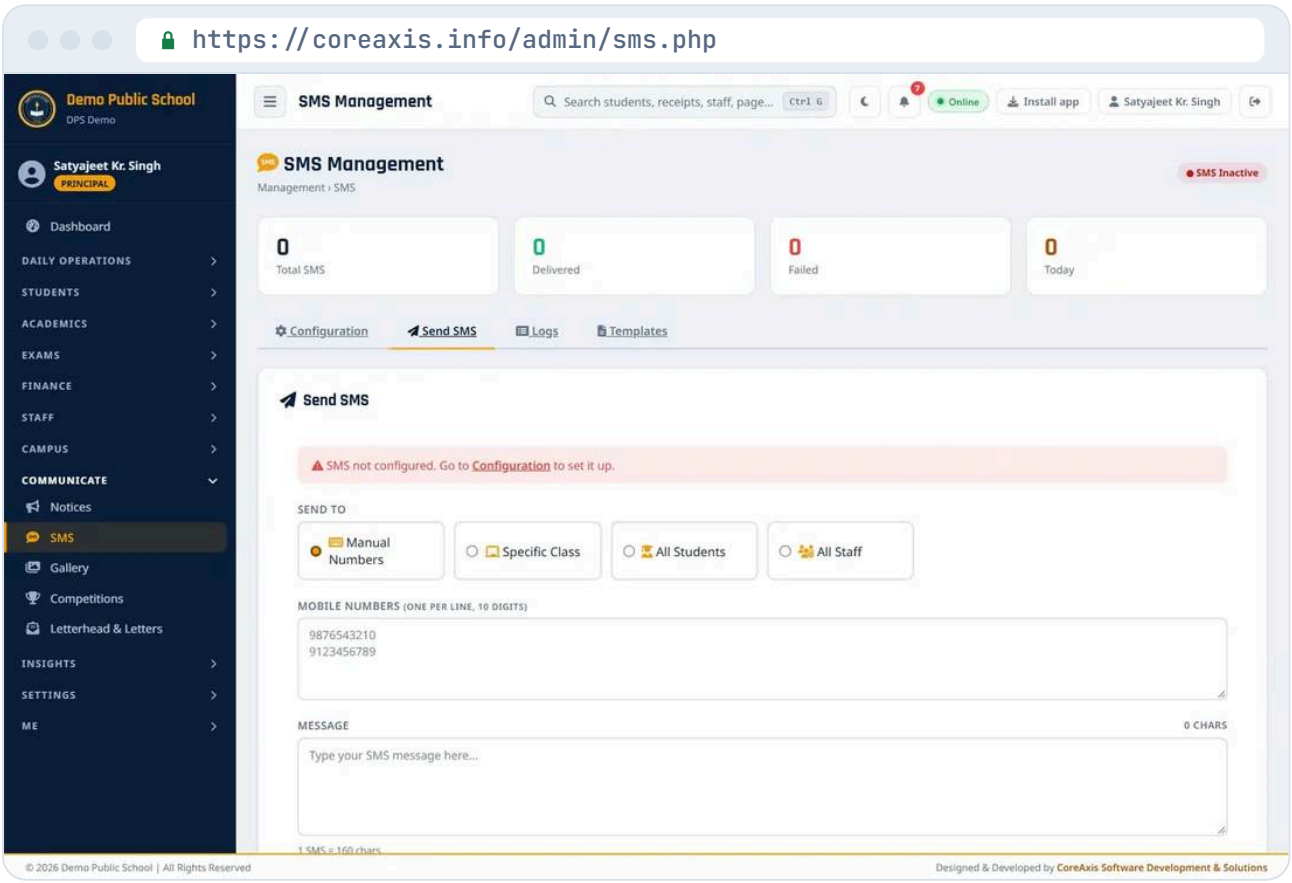
2 Tick the alerts the school wants: **Absent alert to parents (when attendance is saved)**, **Fee receipt on payment**, **Welcome SMS on admission**, **Allow SMS with notices**, **Leave alerts**.

3 Click **Save**.

Send an SMS (Send SMS tab)

Shown for reference only; no SMS was sent for this manual.

1. Open the **Send SMS** tab. If SMS is not configured, a red line says so with a link to **Configuration**.



Send SMS: choose who receives it.

2. In **Send To**, choose **Manual Numbers** (type 10-digit numbers, one per line), **Specific Class** (pick the class in **Select Class**), **All Students** (all parents) or **All Staff**.

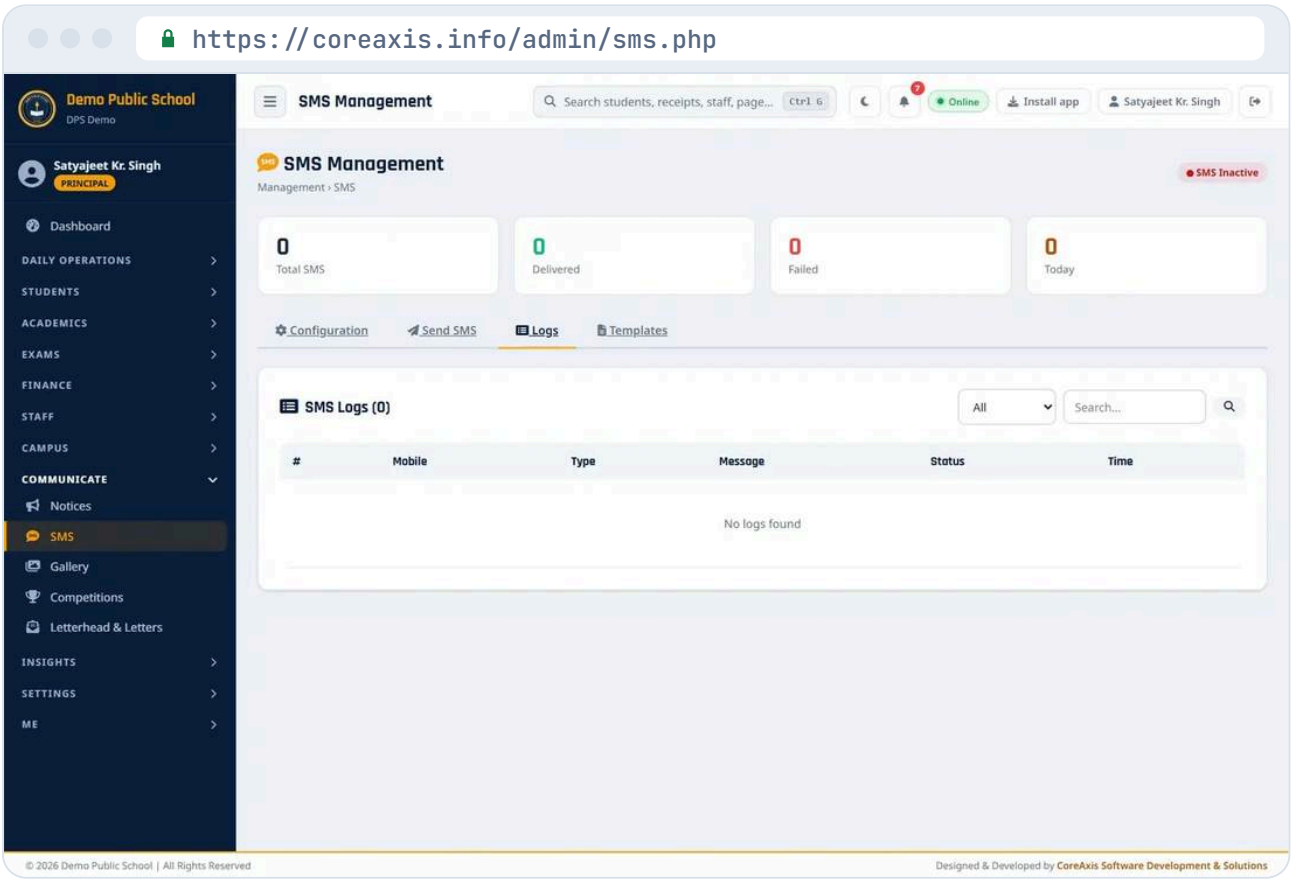
3. Type the **Message**, or click a quick-template button (for example **Result Day** or **Exam Schedule**) and edit the words in brackets. The counter shows characters (1 SMS = 160 characters).

4. Click **Send SMS** and confirm. The button stays disabled until SMS is enabled. The result appears in **Logs**.

IMPORTANT Bulk SMS to all students or a class is sent to every parent mobile number and uses credit for each. Check the text carefully before you send.

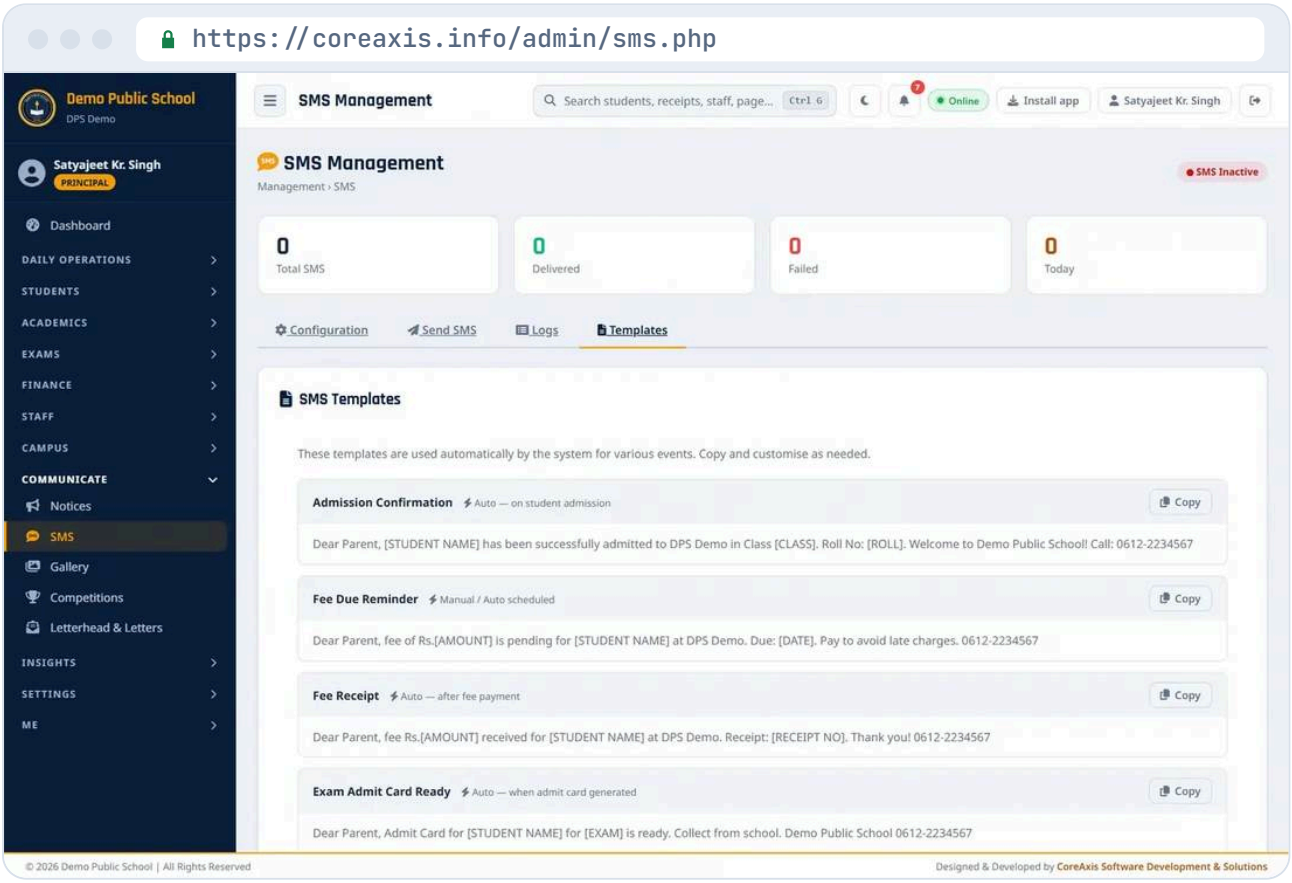
Logs and Templates

1. Open **Logs** to see every SMS with mobile, type, message, status and time. Filter by status or search a number.



SMS Logs.

2 Open **Templates** to read the standard messages used for admission, fee due reminder, fee receipt, admit card and others. Click **Copy** to reuse one in Send SMS.



SMS Templates.

Screen at a glance

SMS Active / Inactive badge	Shows whether the SMS service is enabled.
Total SMS / Delivered / Failed / Today	Counts from the SMS log.
Configuration	Gateway, API key, route, sender and DLT IDs, enable switch, test SMS, automatic SMS, setup guide.
Send SMS	Manual numbers, a class, all students' parents or all staff.
Logs	Every SMS sent by the app, with status.
Templates	Ready texts with placeholders such as [STUDENT NAME] and [AMOUNT].

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Questions

Test SMS fails with an IP error.

Fast2SMS blocks servers that are not whitelisted. Add the server IP in your Fast2SMS account, then send the test again.

Parents receive SMS late or not at all on the Quick SMS route.

Quick SMS is promotional and may be blocked by DND. Register on the TRAI DLT portal and use a DLT route with approved templates.

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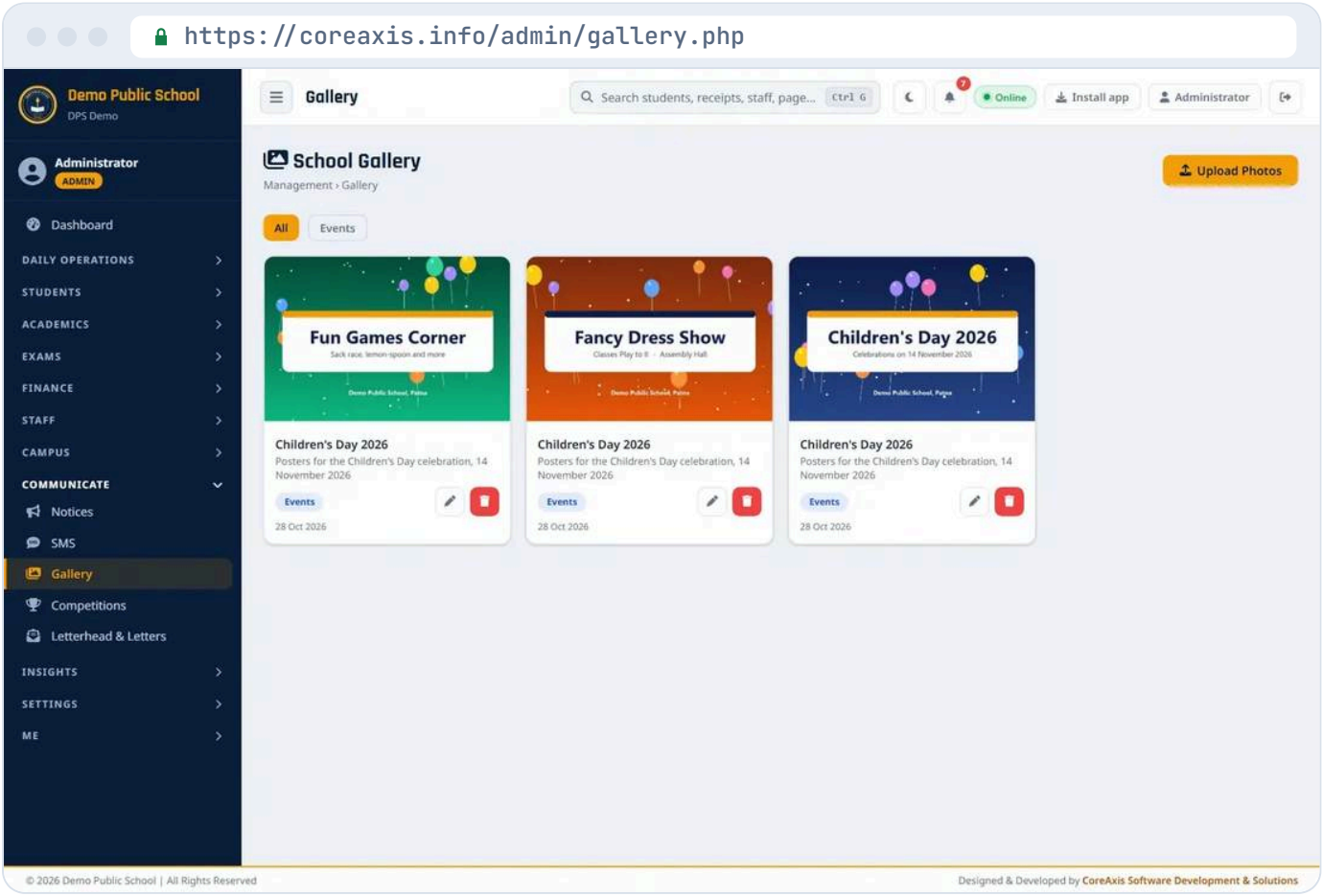
COMMUNICATE · CHAPTER 46

Gallery

Admin Principal MENU Communicate › Gallery

The Gallery holds photos of school events: annual function, sports day, excursions, awards. Photos are grouped by title and category, and the category buttons at the top filter them. The same photos appear on the school's own public website made by CoreAxis.

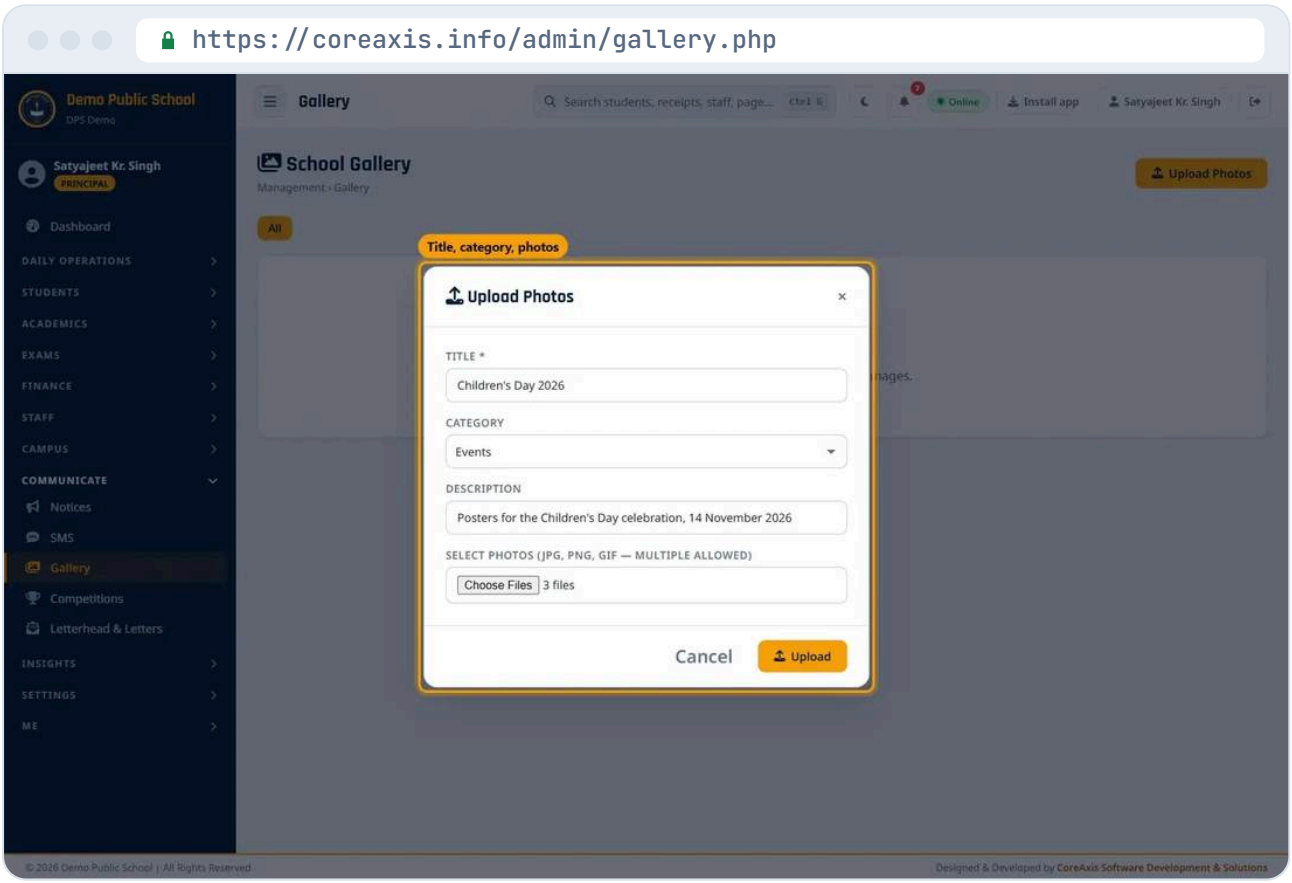


Gallery — Demo Public School

Upload photos (example: Children's Day 2026 posters)

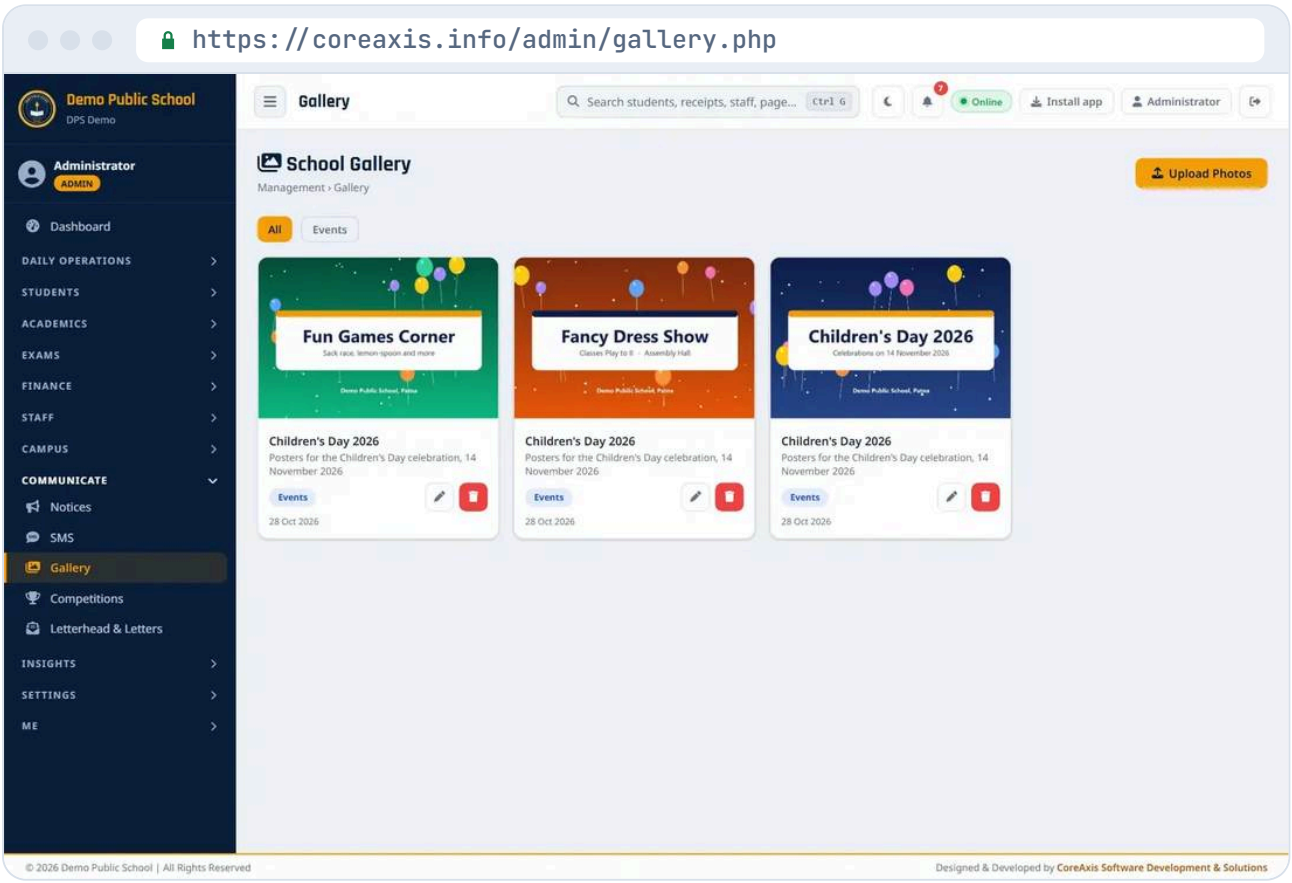
1. Open **Communicate › Gallery** and click **Upload Photos**.
2. Type the **Title** (Children's Day 2026). All photos in this upload get this title.
3. Choose the **Category** (Events). Other categories: Sports, Academic, Cultural, Annual Function, Excursion, Awards, General.
4. Type a short **Description** (optional).

5 Click **Choose Files** under **Select Photos** and pick one or more JPG, PNG or GIF files. The box shows how many are chosen (3 files).



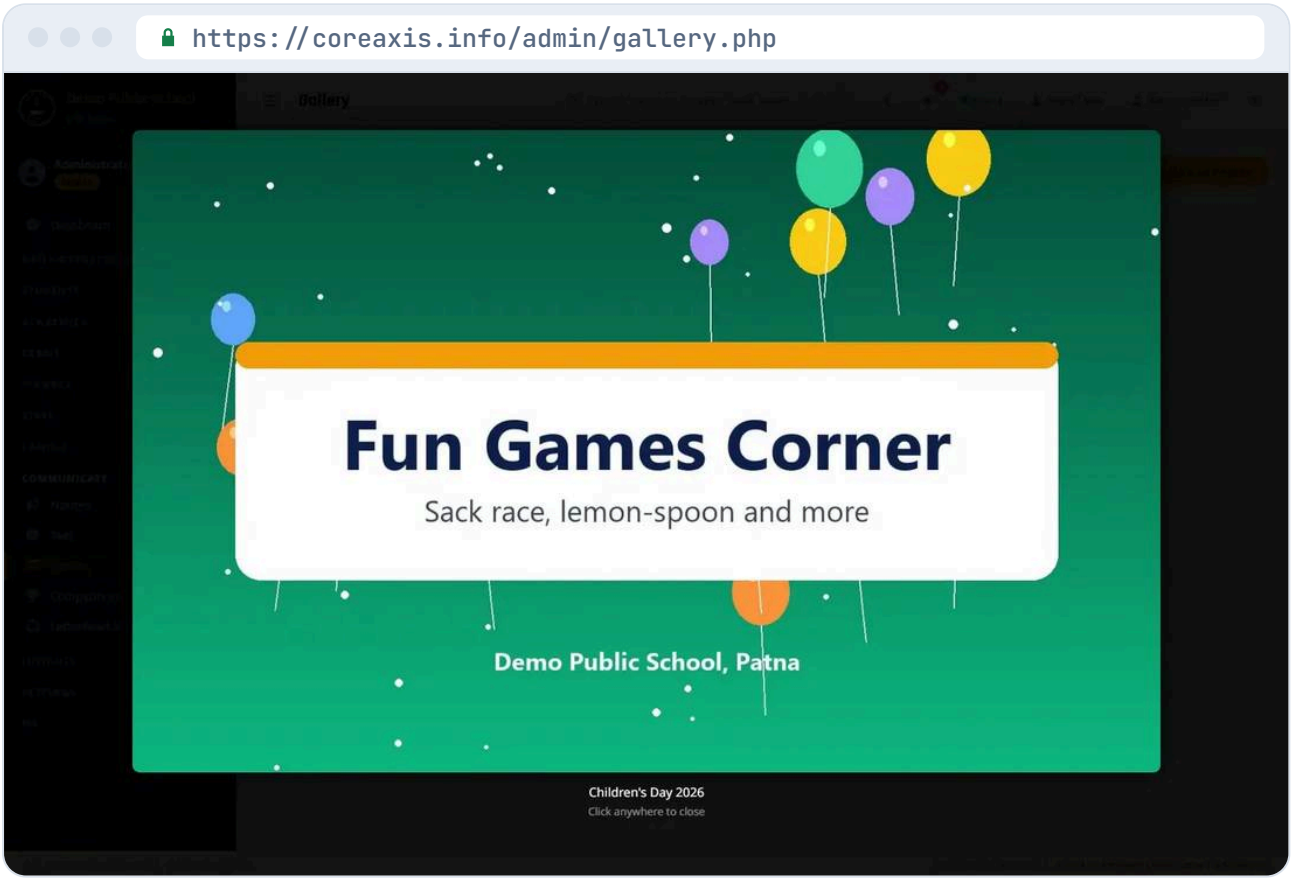
Upload Photos with three files chosen.

6 Click **Upload** and confirm. The message **3 photo(s) uploaded successfully.** appears and the photos show as cards.



Three photos under the Events category.

7 Click a photo to see it full size. Click anywhere to close.



Full-size view.

TIP Use photos up to a few MB each. Large camera photos upload faster if you resize them on the phone first.

TIP Get parents' consent before you publish photos of children on the public website.

Edit or delete a photo

1 Click the pencil icon on a photo card to change its title, category or description, or to replace the picture.

2 Click the red bin icon to delete a photo, and confirm.

IMPORTANT A deleted photo is removed from the server and the website and cannot be brought back.

Screen at a glance

Category buttons (All, Events ...)	Show only the photos of one category.
Photo card	Picture, title, description, category badge, upload date, Edit and Delete.

Questions

Can parents see the gallery?

Yes. The photos appear in the Gallery section of the school's public website.

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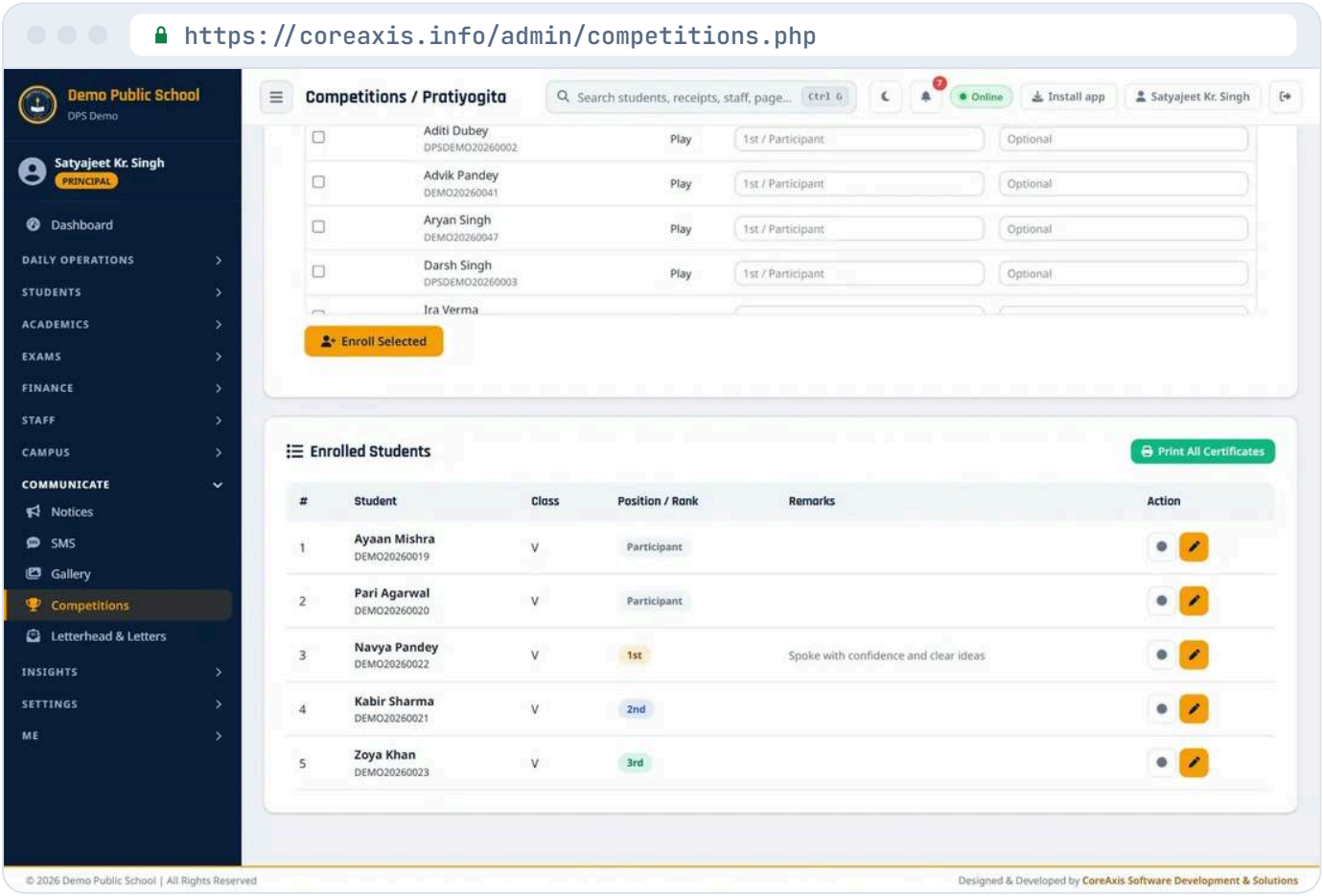
COMMUNICATE · CHAPTER 47

Competitions

Admin Principal Teacher

MENU Communicate › Competitions (Teacher: Library & Activities › Competitions)

Competitions (Pratiyogita) records school events such as quizzes, drawing, elocution and sports races, from intra-school to national level. For each competition you enrol the students taking part, then enter each one's position and prize. Certificates are printed from the same data through **Exams › Exam Certificates**, with the school's logo, signature and watermark.

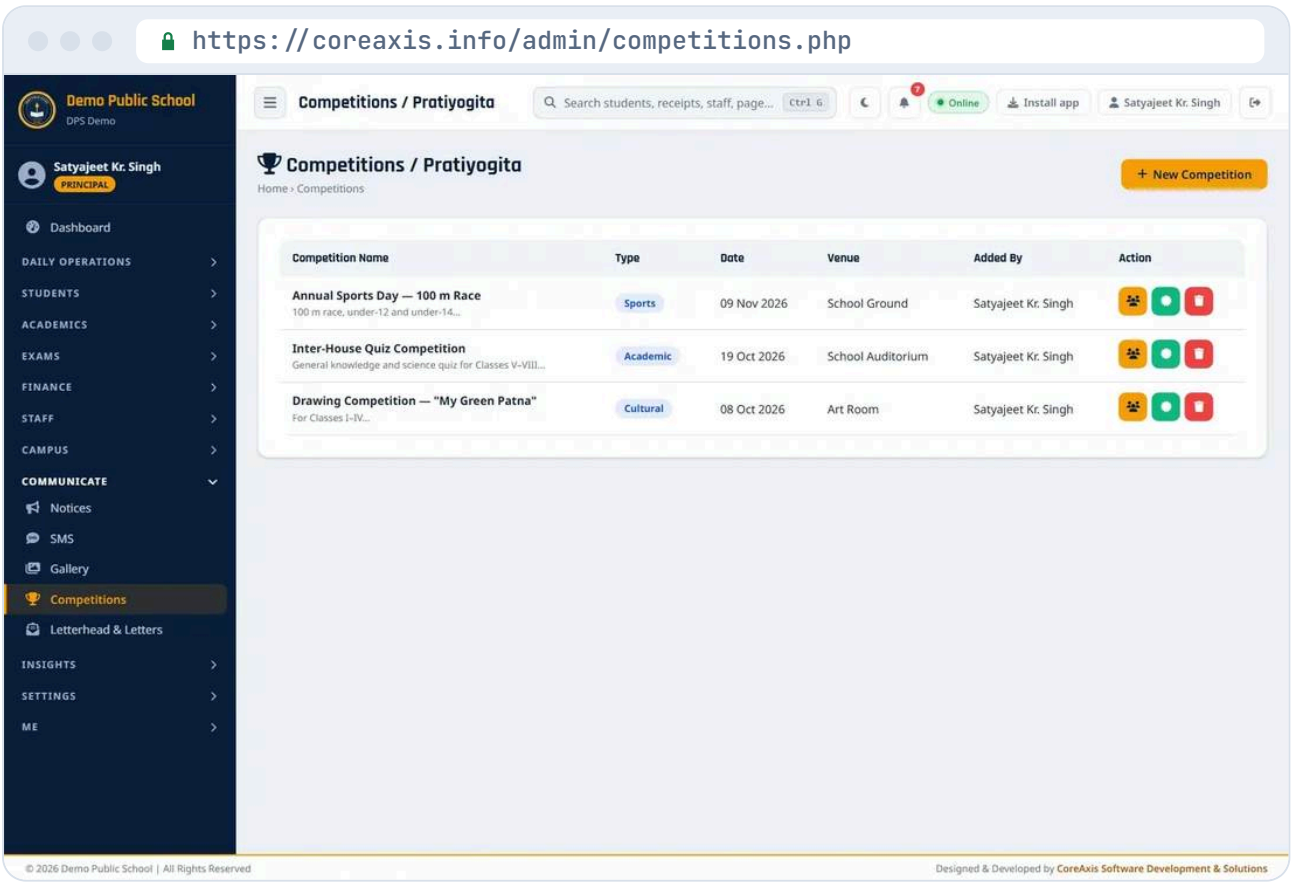


Competitions — Demo Public School

Create a competition (example: Children's Day

Elocution Competition, 14 November 2026)

1. Open **Communicate › Competitions** and click **New Competition**.

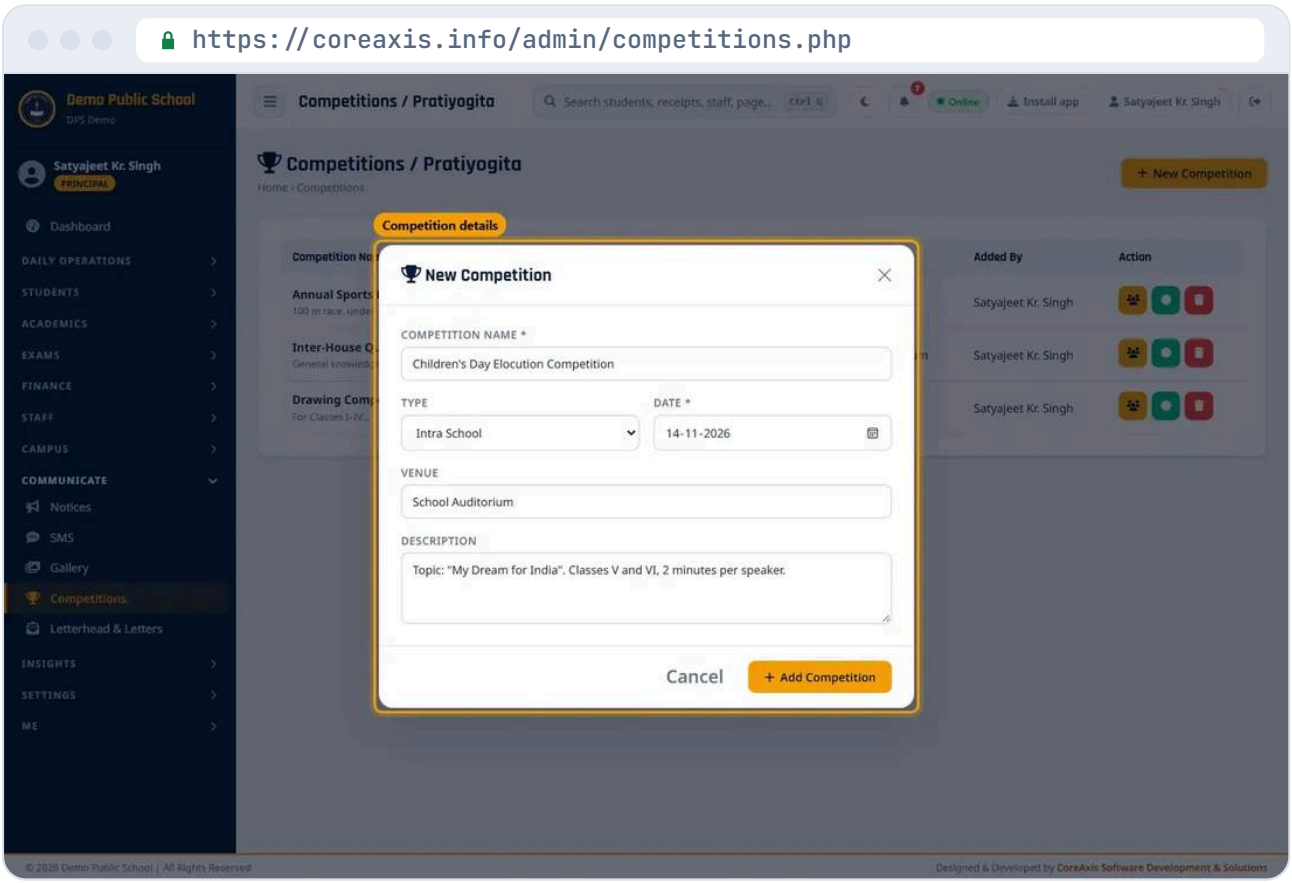


Competitions list.

2. Type the **Competition Name** (Children's Day Elocution Competition).

3. Choose the **Type** (Intra School). Others: Inter School, District Level, State Level, National Level, Other.

4 Pick the **Date** (14-11-2026) and type the **Venue** (School Auditorium) and **Description** (topic, classes, time per speaker).



New Competition form.

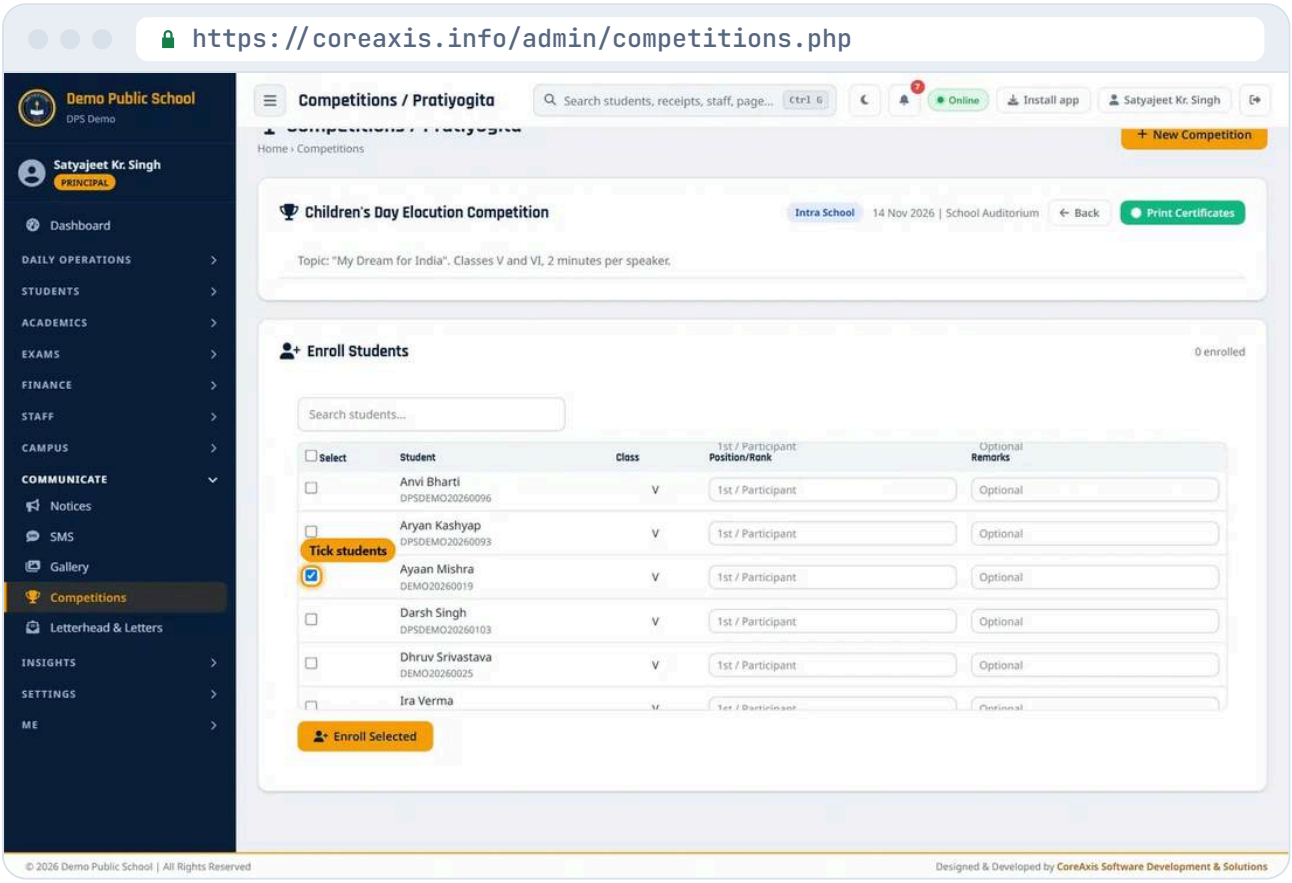
5 Click **Add Competition** and confirm. The message **Competition added!** appears.

Enrol students (example: five students of Class V)

1 Click the blue people icon (**Manage Enrollment**) on the competition's row.

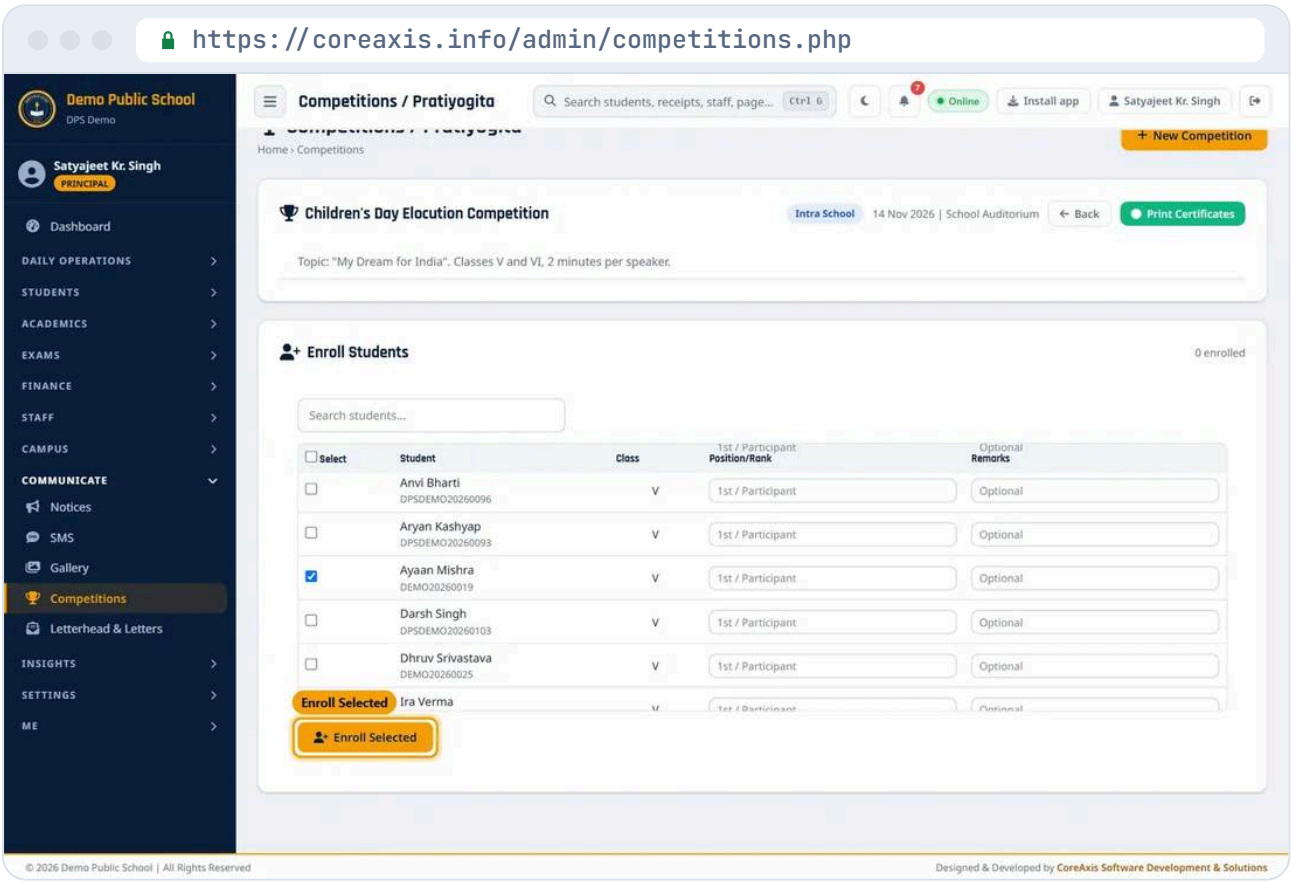
2 Under **Enroll Students**, type in **Search students...** to narrow the list.

3 Tick the students taking part: Kabir Sharma, Navya Pandey, Zoya Khan, Pari Agarwal and Ayaan Mishra. You can also type a position or remark now, or leave them blank.



Tick a student to enrol.

4 Click **Enroll Selected** and confirm. The message **5 student(s) enrolled!** appears and the students are listed under **Enrolled Students**.



Enroll Selected.

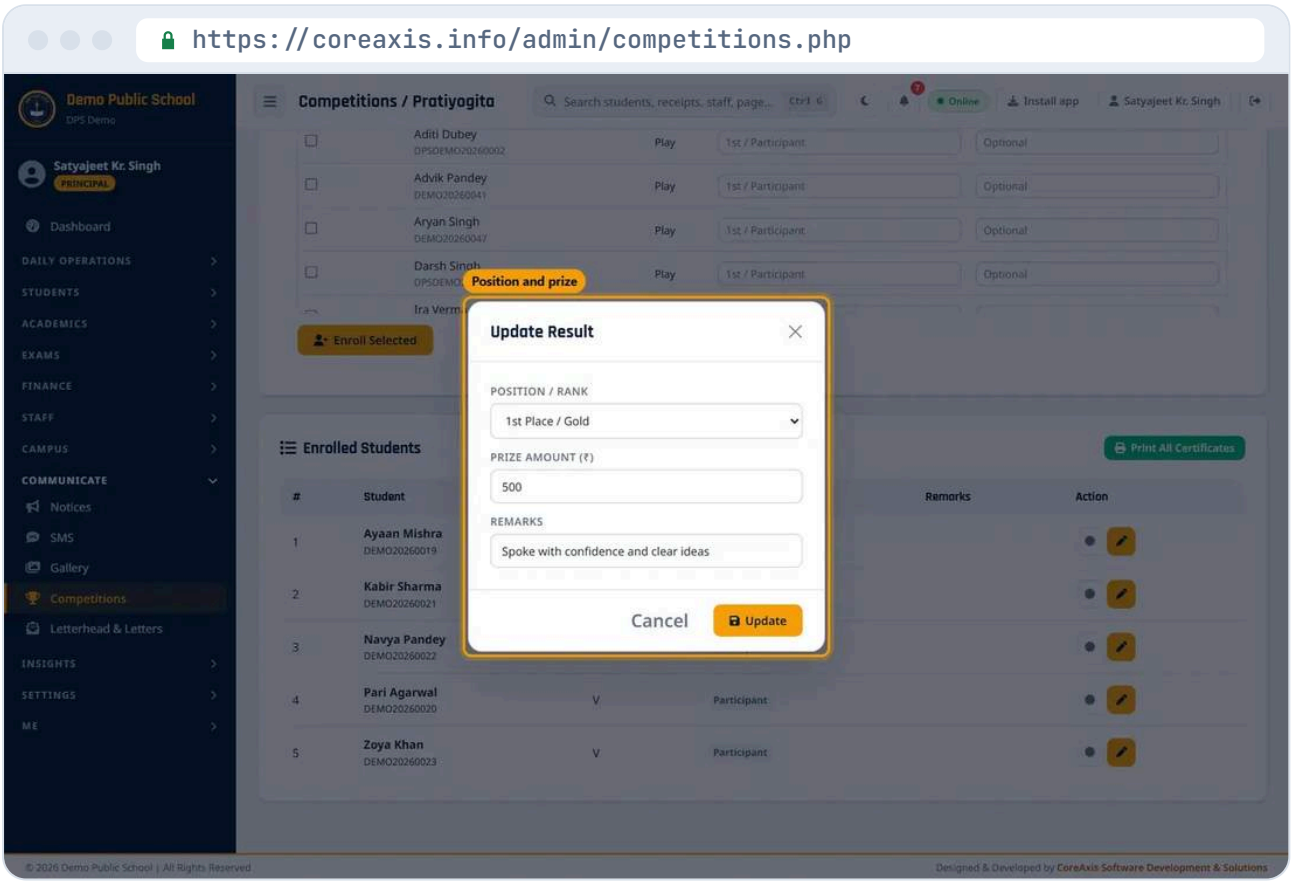
TIP The tick box in the header selects every student not yet enrolled. Already-enrolled students are shaded and cannot be ticked again.

Record positions and prizes (example: Navya Pandey 1st with ₹500)

1 In **Enrolled Students**, click the orange pencil icon on the student's row.

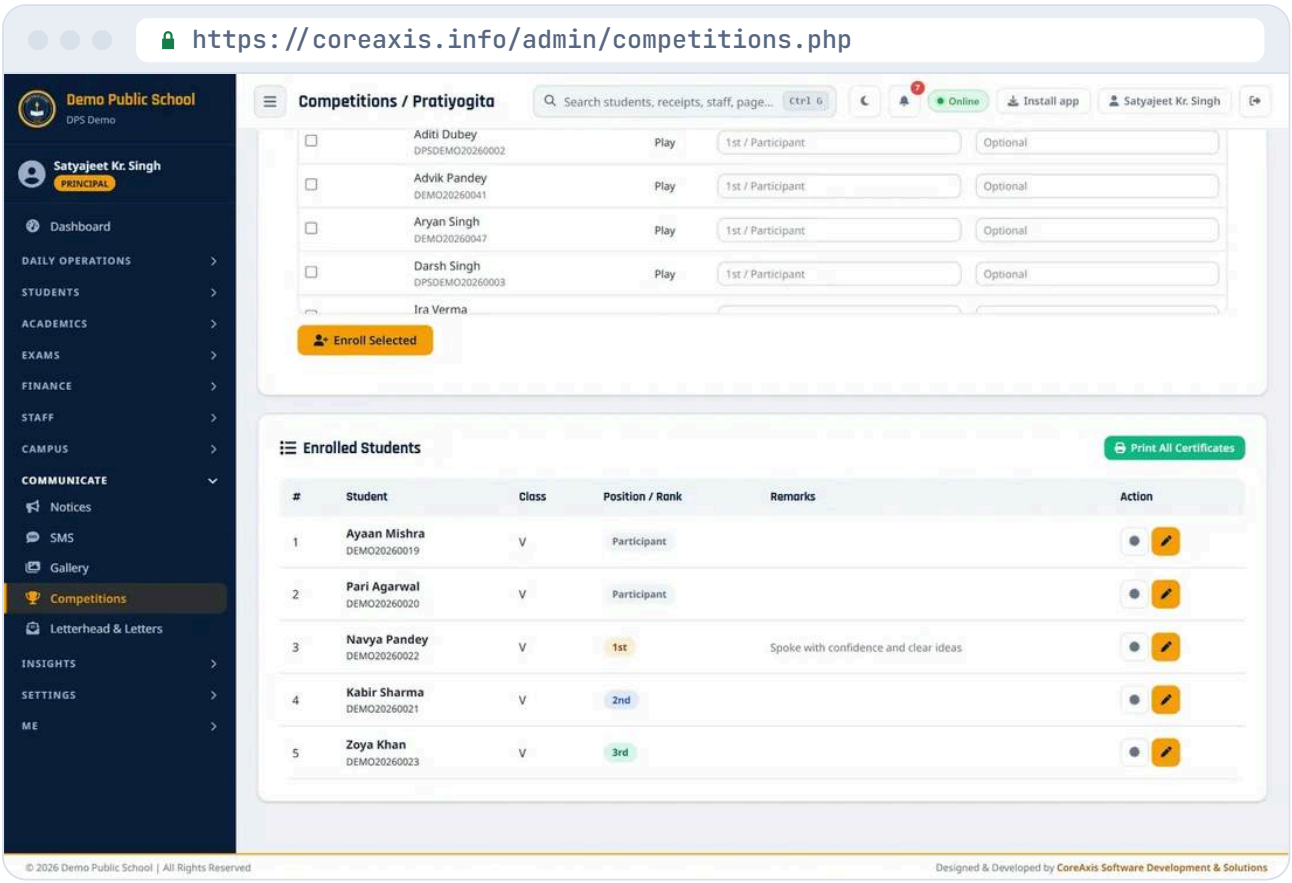
2 Choose the **Position / Rank**: Participant, 1st Place / Gold, 2nd Place / Silver, 3rd Place / Bronze, Special Prize or Consolation.

3 Type the **Prize Amount (₹)** (500) and a **Remarks** line (Spoke with confidence and clear ideas).



Update Result.

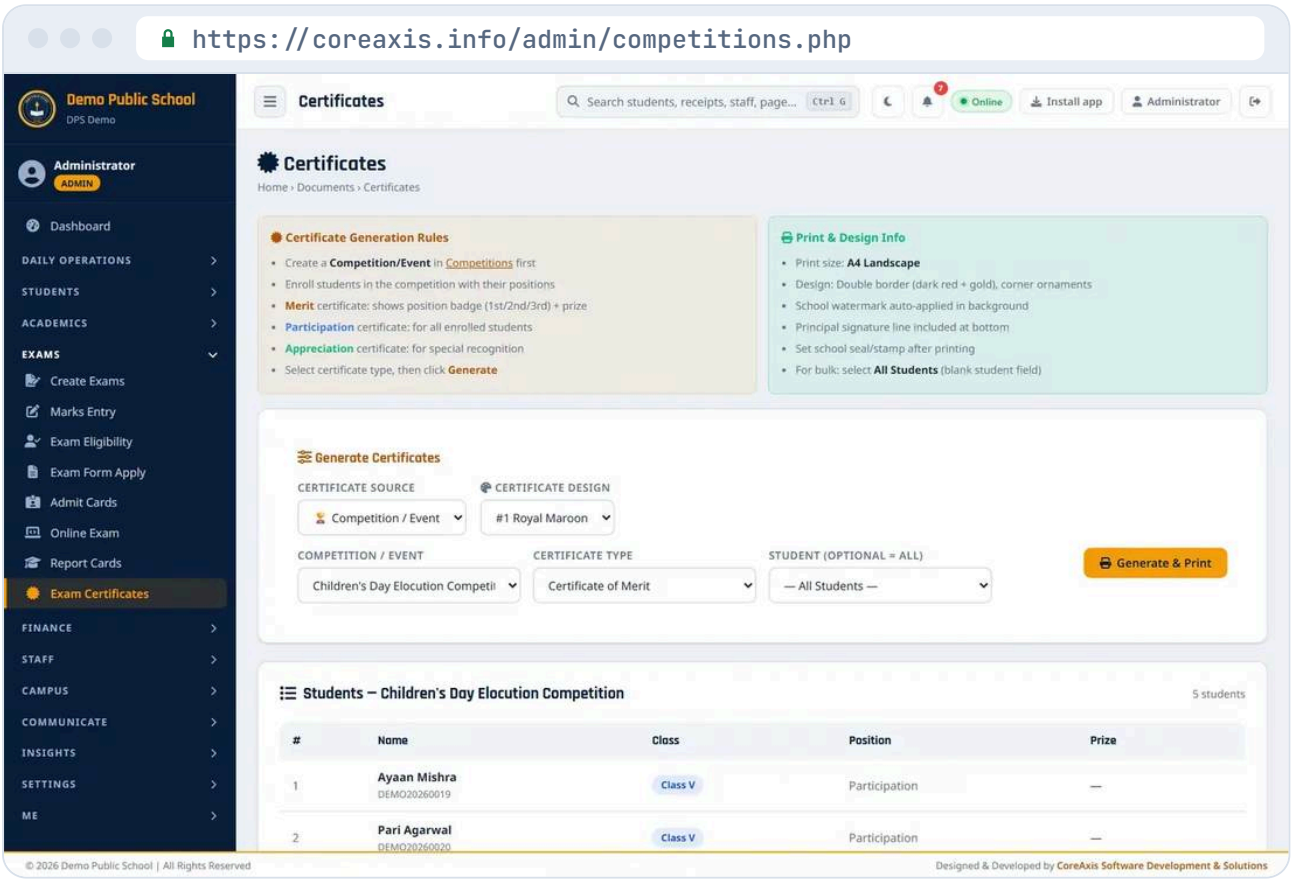
4 Click **Update** and confirm. Repeat for 2nd (Kabir Sharma, ₹300) and 3rd (Zoya Khan, ₹200).



Enrolled Students with positions.

Print certificates

1. Click **Print All Certificates** (or the certificate icon on one student's row). The Certificates page opens with the competition already chosen.

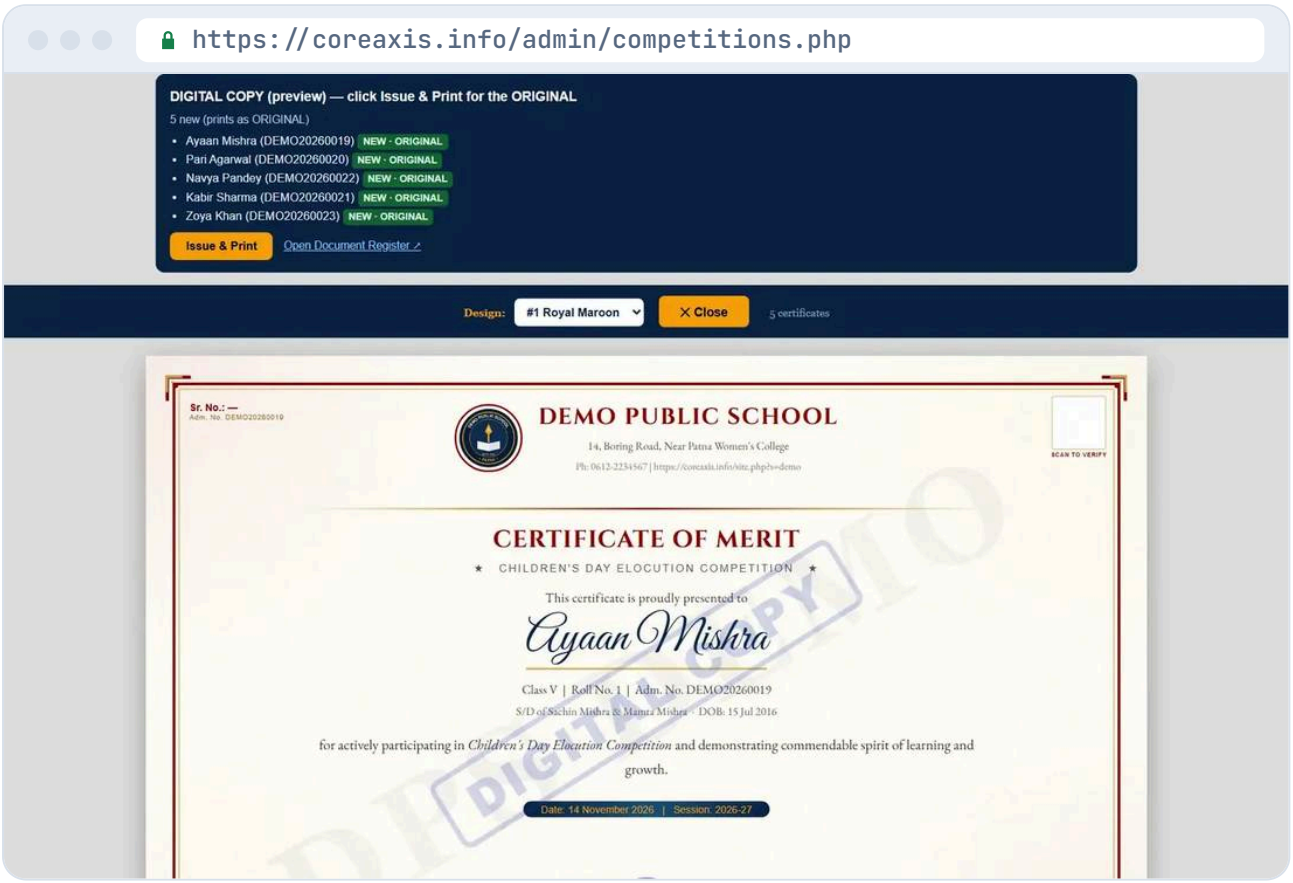


Children's Day Elocution Competition: Navya Pandey 1st, Kabir Sharma 2nd, Zoya Khan 3rd; Ayaan Mishra and Pari Agarwal show Participation.

2. Choose the **Certificate Design** and the **Certificate Type**: **Certificate of Merit** (position badge and prize), **Participation** or **Appreciation**.

3. Leave **Student** at **— All Students —** for all, or pick one student.

4 Click **Generate & Print**. Check the preview, then click **Issue & Print** to print the originals.



A4 landscape certificate, DIGITAL COPY preview.

TIP Print merit certificates for the prize winners and participation certificates for the rest.

Screen at a glance

Competition list	Competition Name with description, Type, Date, Venue, Added By, and Manage Enrollment / Print Certificates / Delete.
Enroll Students	Search, Select, Student and admission no., Class, Position/Rank, Remarks, Enroll Selected.
Enrolled Students	Position badge, Remarks, Print Certificate and Edit result for each student.

Questions

Can a teacher manage a competition?

Yes. Teachers open Library & Activities › Competitions. A competition can be changed by the principal / admin or by the teacher who created it.

Is the prize money paid from fees?

No. Prize Amount is recorded on the result and printed on the certificate. Record the actual payment in Finance › Expenses.

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COMMUNICATE · CHAPTER 48

Letterhead & Letters

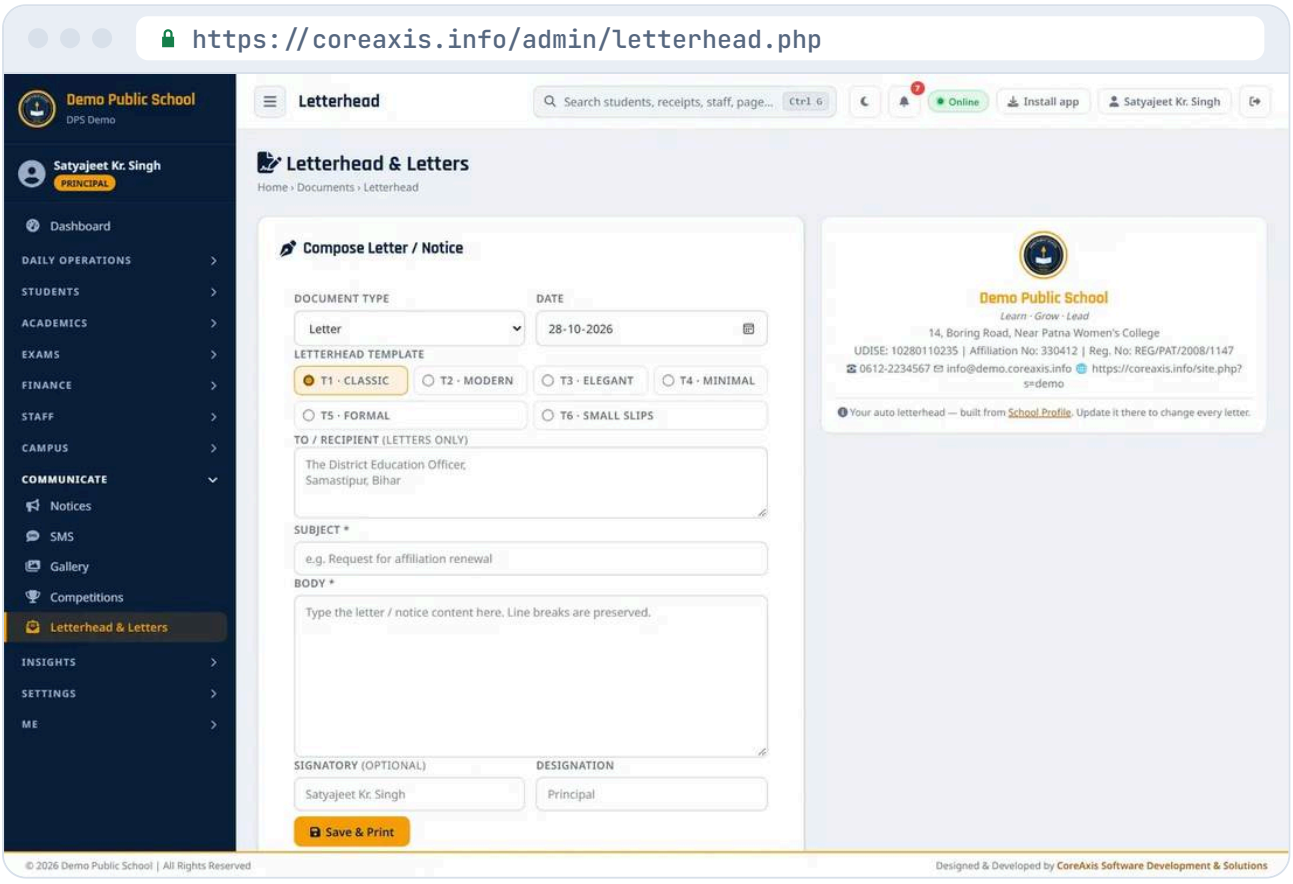
Admin Principal MENU Communicate › Letterhead & Letters

The letterhead is built from the School Profile: logo, name, tagline, address, UDISE, affiliation and registration numbers, phone, email and website. You type the letter; the app adds the letterhead, a reference number (for example DPSDEMO/CIR/2026-27/0001), the date and the signature, and keeps a copy in **Saved Letters & Notices** so it can be reprinted. Six designs are available.

Letterhead & Letters — Demo Public School

Write and print a circular (example: winter timings from 2 November 2026)

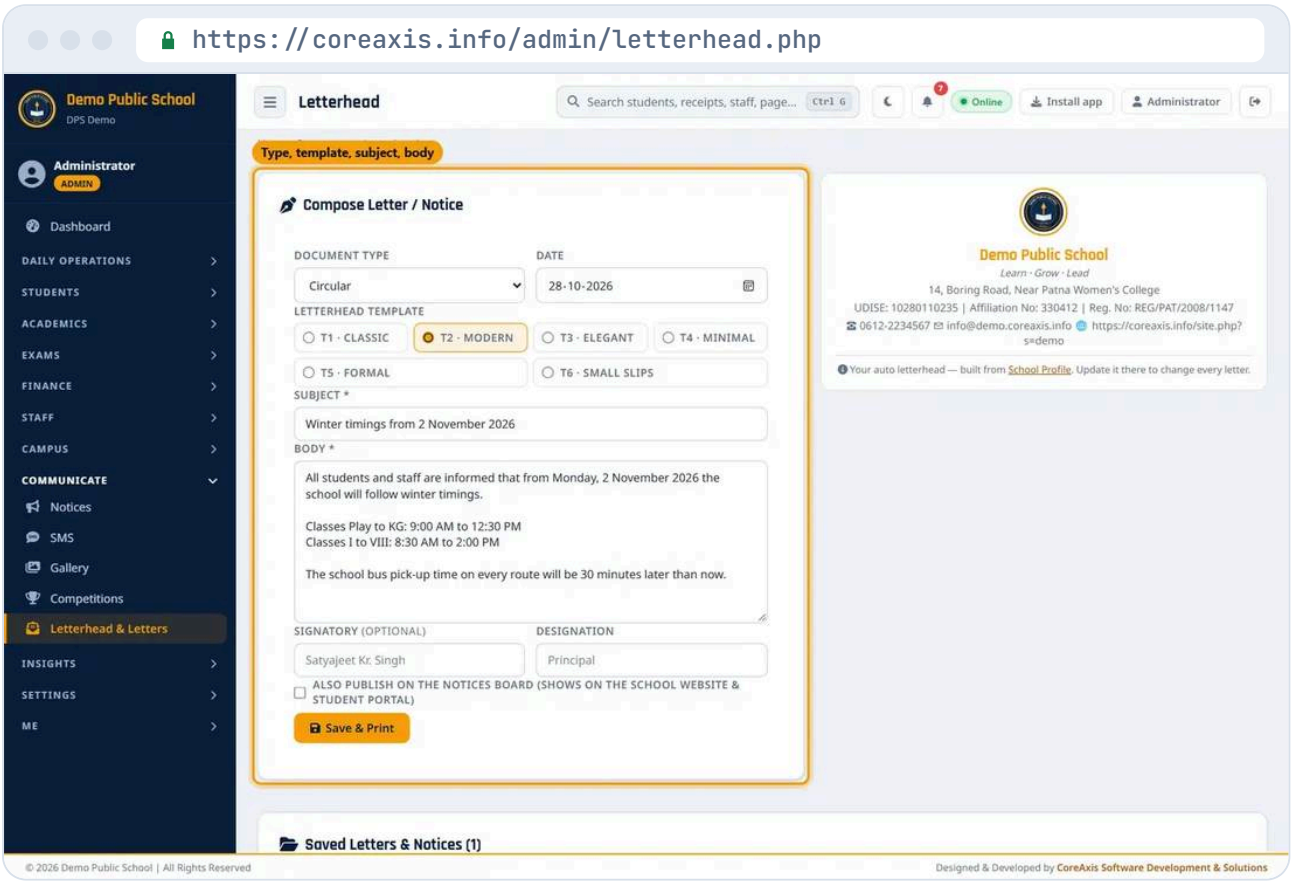
1. Open **Communicate › Letterhead & Letters**. On the right you see your auto letterhead.



Compose Letter / Notice with the letterhead preview.

2. Choose the **Document Type**: **Circular** (or **Letter**, **Notice**).
3. Check the **Date** and click a **Letterhead Template**: T1 Classic, T2 Modern, T3 Elegant, T4 Minimal, T5 Formal or T6 Small Slips.
4. For a letter only, type the **To / Recipient** address (for example The District Education Officer, Patna).

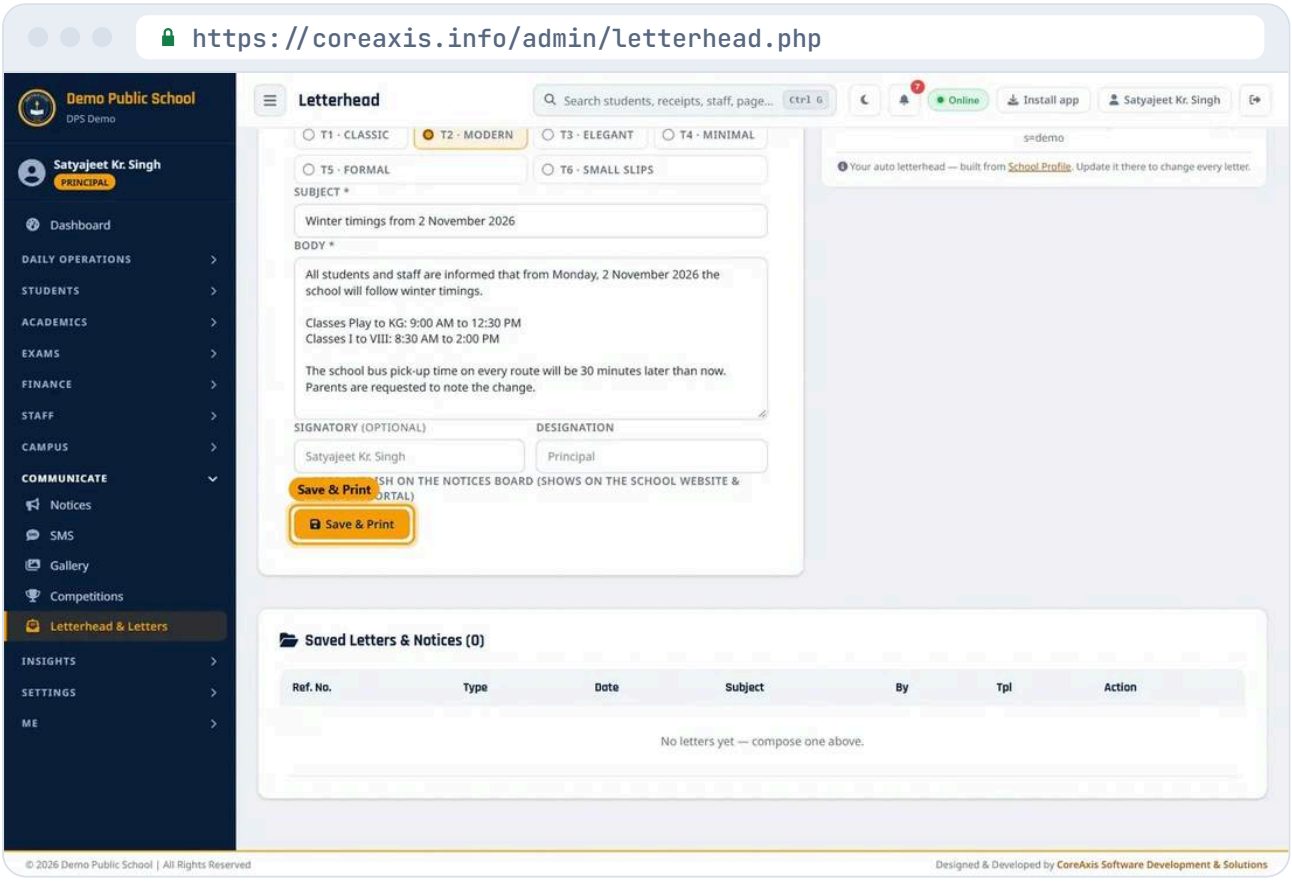
5 Type the **Subject** (Winter timings from 2 November 2026) and the **Body**. Line breaks are kept.



Circular with subject and body.

6 Check **Signatory** and **Designation** (the principal's name is filled in). For a notice, tick **Also publish on the Notices board** to show it on the school website and student portal too.

7 Click **Save & Print** and confirm.



Save & Print.

8 The message **Saved — DPSDEMO/CIR/2026-27/0001** appears and the print view opens in a new tab. Click **Open print view** if your browser blocked it.

Printed circular with reference number and date.

9 In the print view, use **T1–T6** to try another design, then click **Print**.

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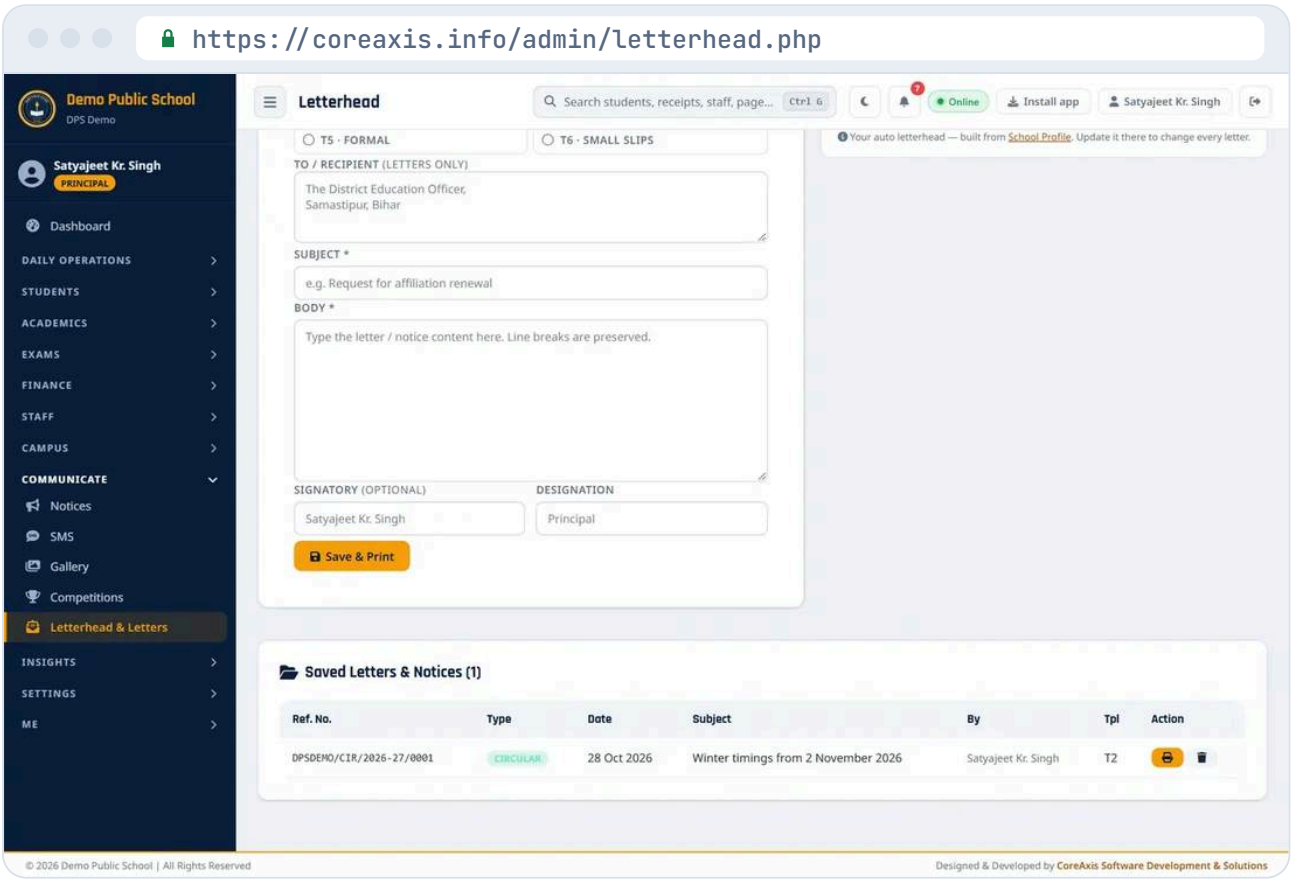
Reprint or delete a saved letter

1. Scroll to **Saved Letters & Notices**. Each row shows Ref. No., Type, Date, Subject, By and template.



Saved Letters & Notices.

2. Click the print icon to open it again.
3. Click the bin icon to delete a letter made by mistake, and confirm.

IMPORTANT Deleting a letter cannot be reversed.

Screen at a glance

Document Type	Letter (with recipient), Notice or Circular. Each type has its own reference series (LTR, NTC, CIR).
Letterhead Template	Six designs; T6 Small Slips prints 6, 8 or 10 identical slips on one A4 sheet, for cutting and handing out.
Auto letterhead preview	Built from School Profile. Change the logo, address or numbers there.

Saved Letters & Notices	History of every saved letter with reprint and delete.

Questions

The address on the letterhead is old.

Update it in Settings › School Profile › Address. Every letter, certificate and card uses the new address from then on.

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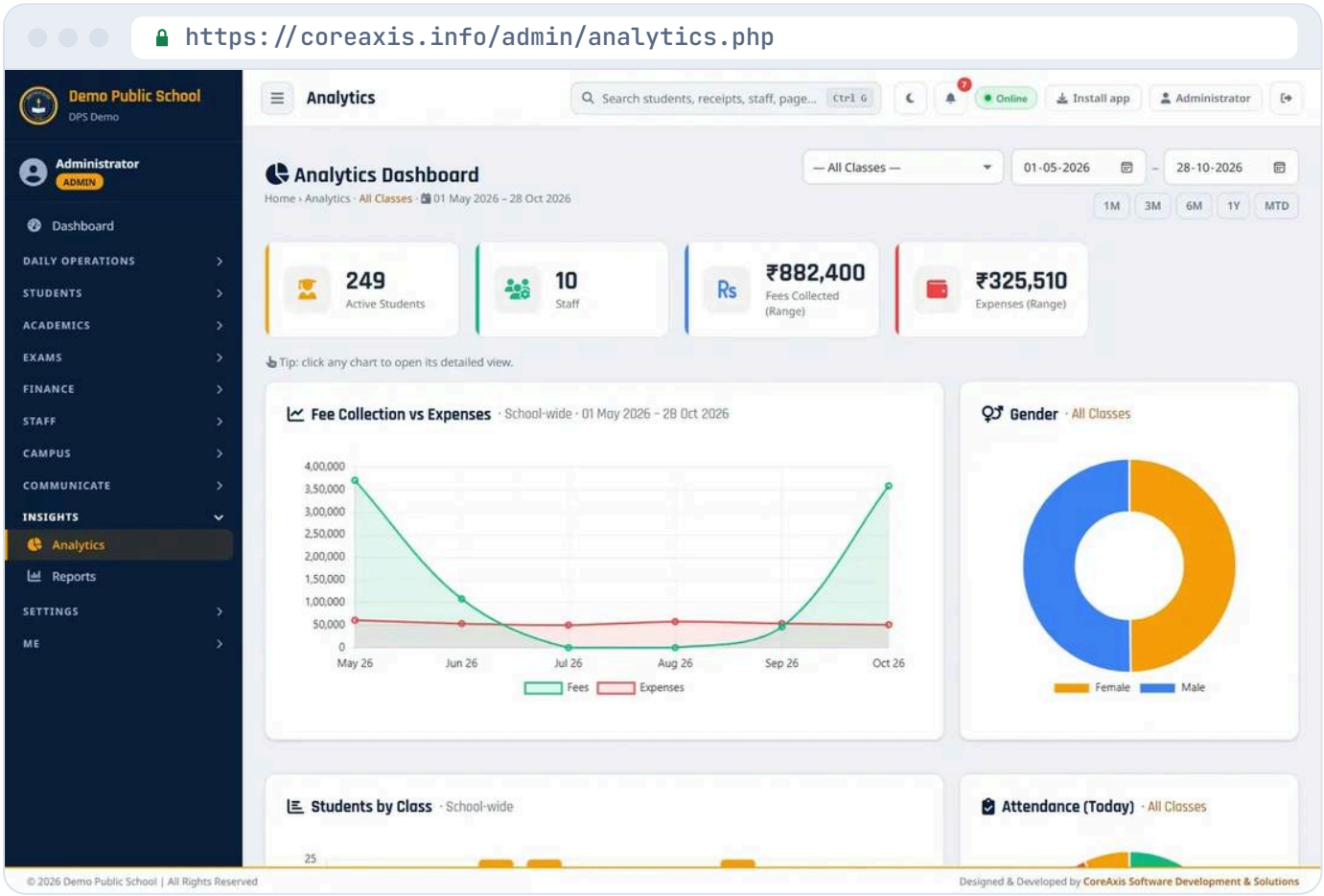
INSIGHTS & SETTINGS · CHAPTER 49

Analytics

Admin Principal MENU Insights › Analytics

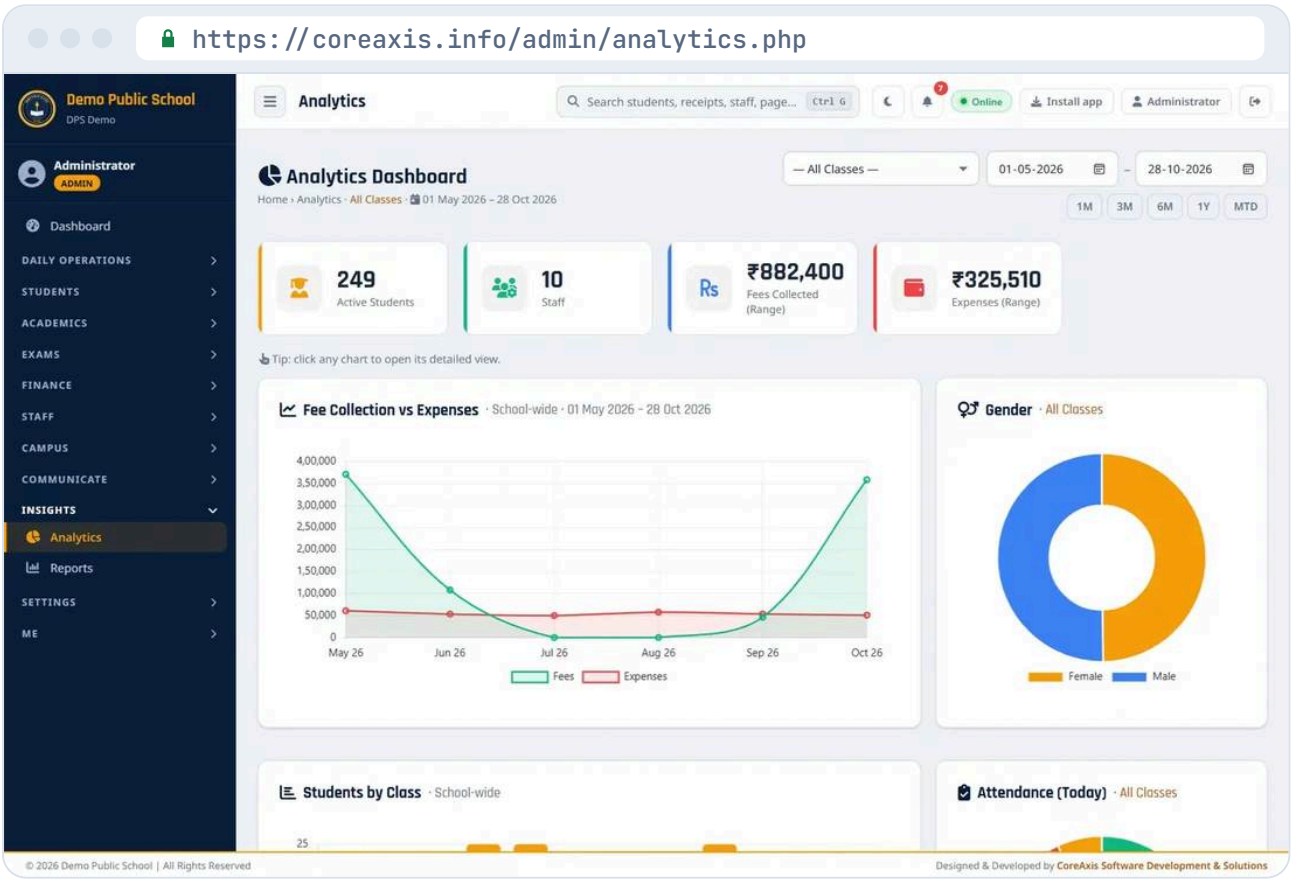
Analytics turns the school's records into charts: fee collection against expenses month by month, students by class, gender and category, today's attendance, expenses by category, new admissions, staff by role, fees by payment mode, online exam scores and admission enquiries. Choose a class and a date range at the top; click any chart to open the page behind it.



Analytics — Demo Public School

Read the school overview

1. Open **Insights › Analytics**. The default view is **— All Classes —** for the last six months.

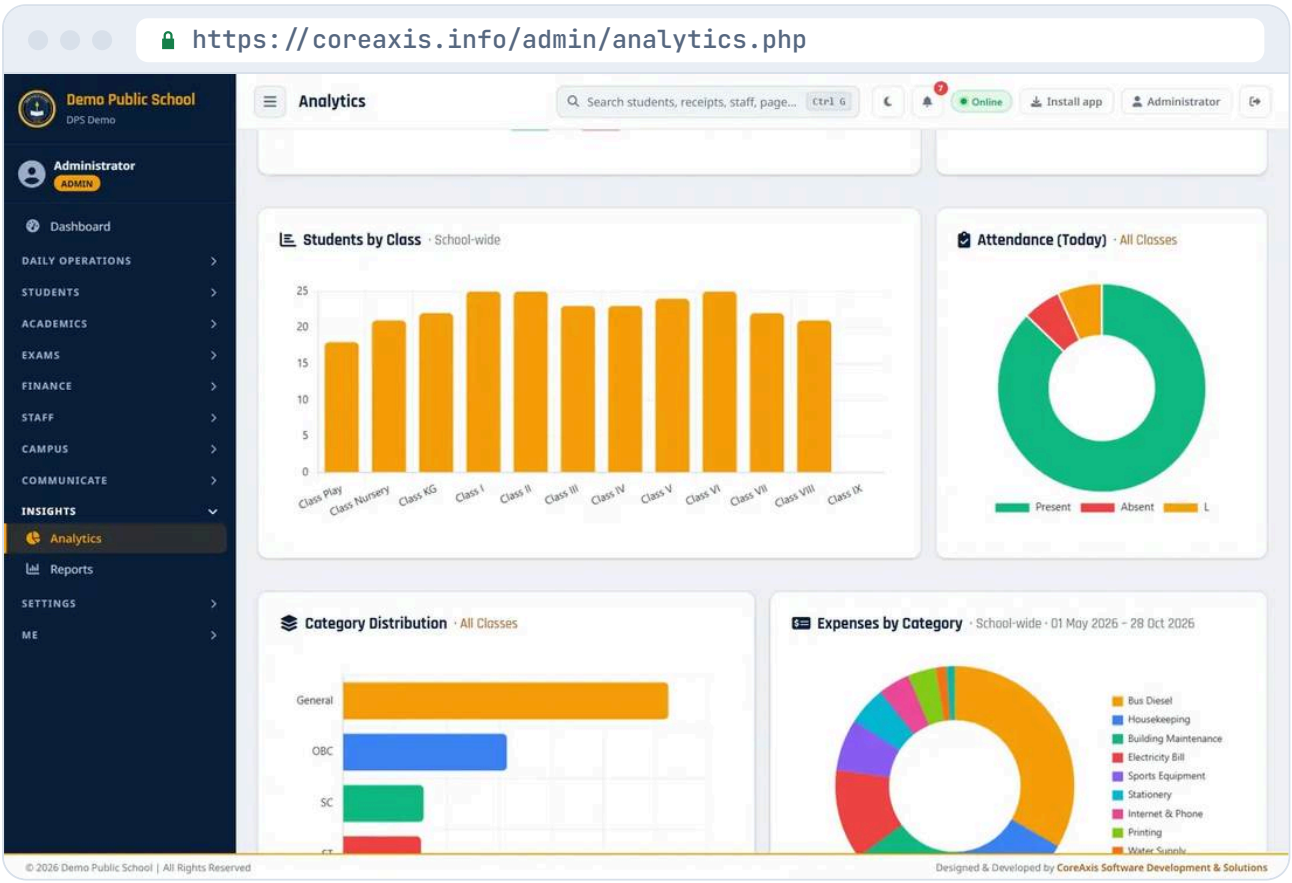


Active Students, Staff, Fees Collected and Expenses for the range.

2. Read the four cards: **Active Students**, **Staff**, **Fees Collected (Range)** and **Expenses (Range)**.

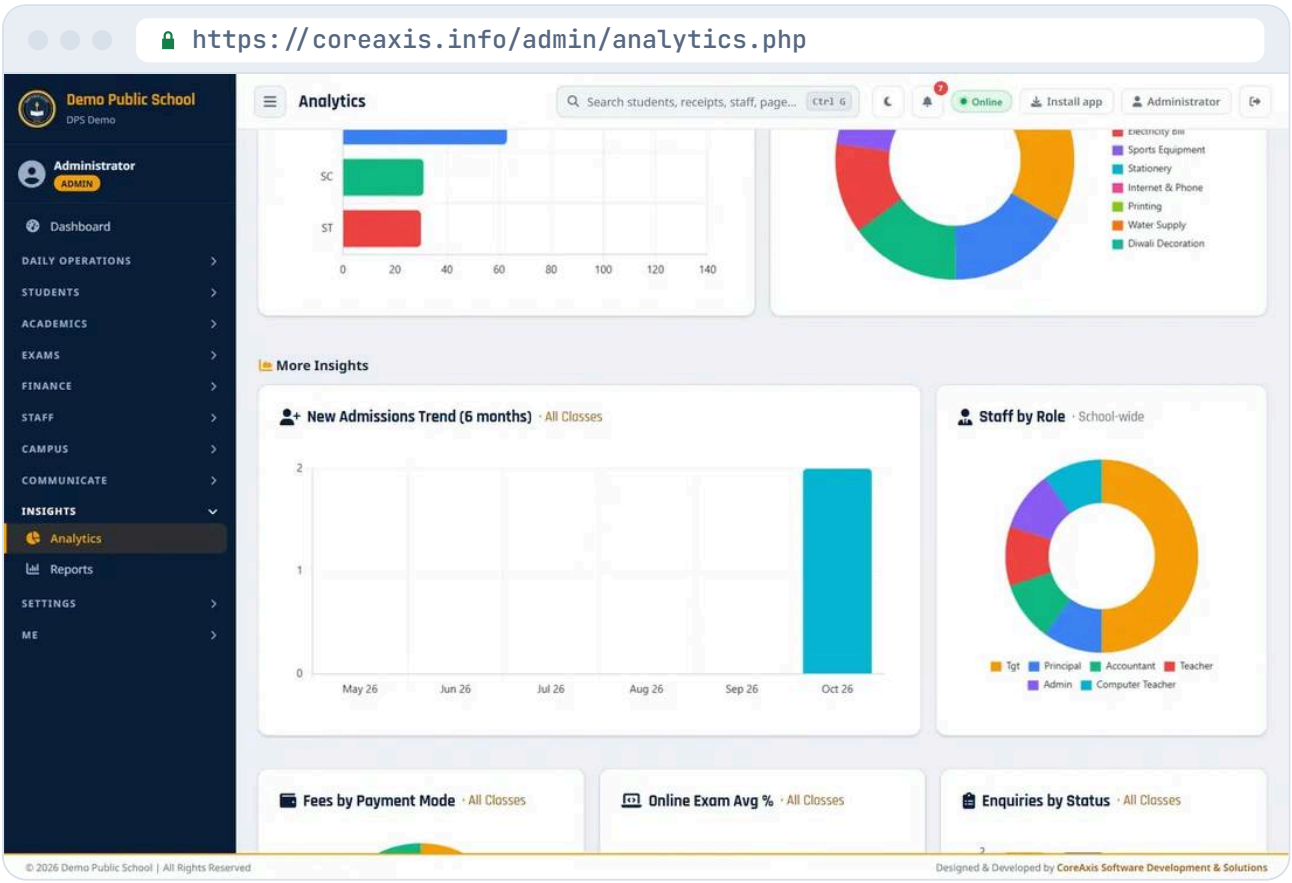
3. **Fee Collection vs Expenses** shows the two lines month by month.

4 Scroll down for **Students by Class**, **Attendance (Today)**, **Category Distribution** and **Expenses by Category**.



Students by class and today's attendance.

5 Under **More Insights**, see **New Admissions Trend (6 months)**, **Staff by Role**, **Fees by Payment Mode**, **Online Exam Avg %** and **Enquiries by Status**.



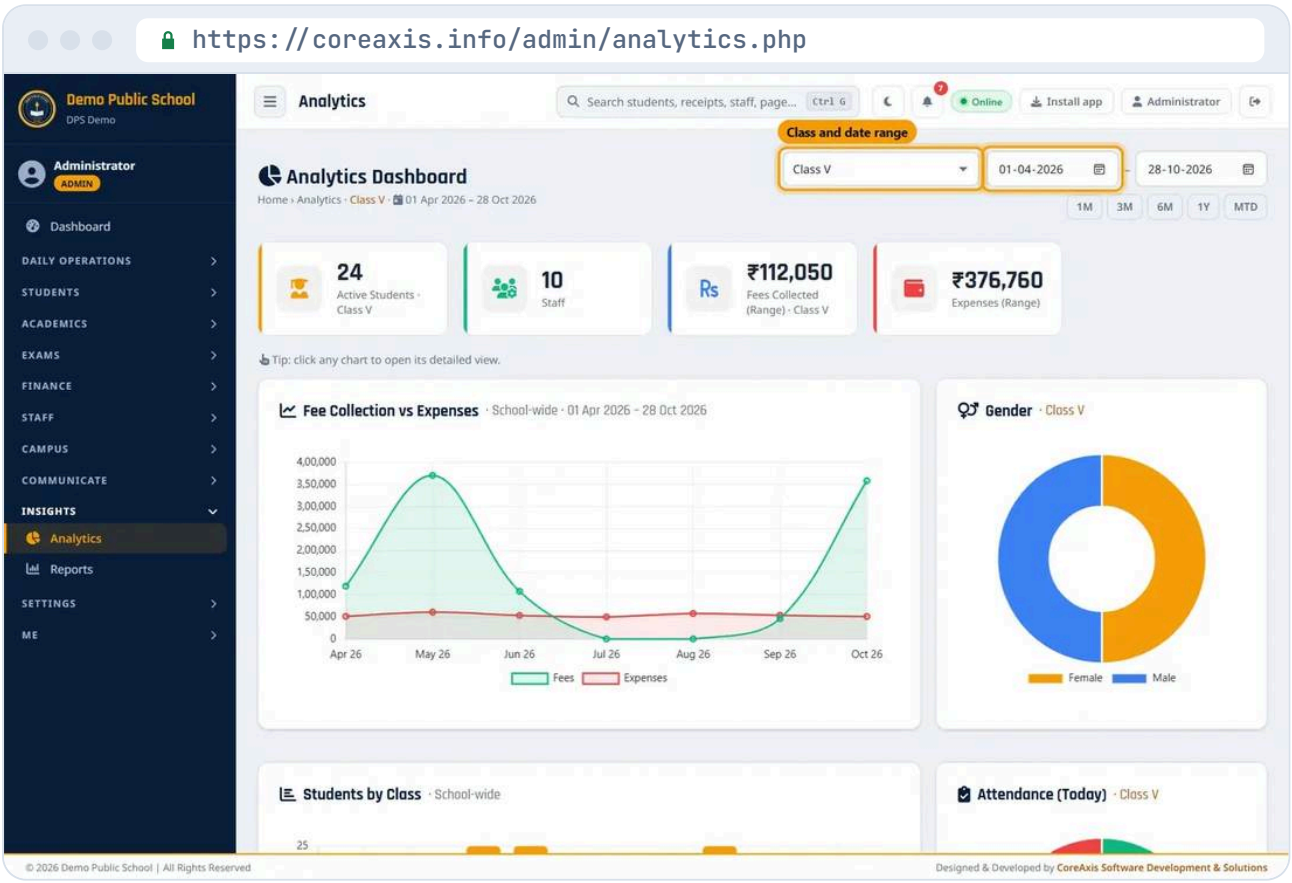
More Insights.

6 Click any chart to open the page that holds its details.

Look at one class for a chosen period (example: Class V, 1 April – 28 October 2026)

1 In the class box at the top, choose **Class V**.

2 Set the dates (01-04-2026 to 28-10-2026), or click a quick range: **1M**, **3M**, **6M**, **1Y** or **MTD** (month to date).



Class V: 24 students, ₹1,12,050 fees in the range.

3 Cards and charts marked with the class name now show only that class. Charts marked **School-wide** (expenses, students by class, staff by role) always show the whole school.

Screen at a glance

Class / From / To / 1M 3M 6M 1Y MTD	Filters for every chart that is not school-wide.
Fees Collected (Range)	Receipts in the date range (for the chosen class if one is picked).
Expenses (Range)	School expenses in the date range (always school-wide).
Gender / Category Distribution	Active students by gender and by category (General, OBC, SC, ST ...).
Attendance (Today)	Present, absent and leave for today's student attendance.

Fees by Payment Mode	Cash, UPI, cheque, online and other modes.

Questions

The numbers here differ from the Finance Ledger.

Check the date range: Analytics starts six months back by default. Set the same From and To as the ledger.

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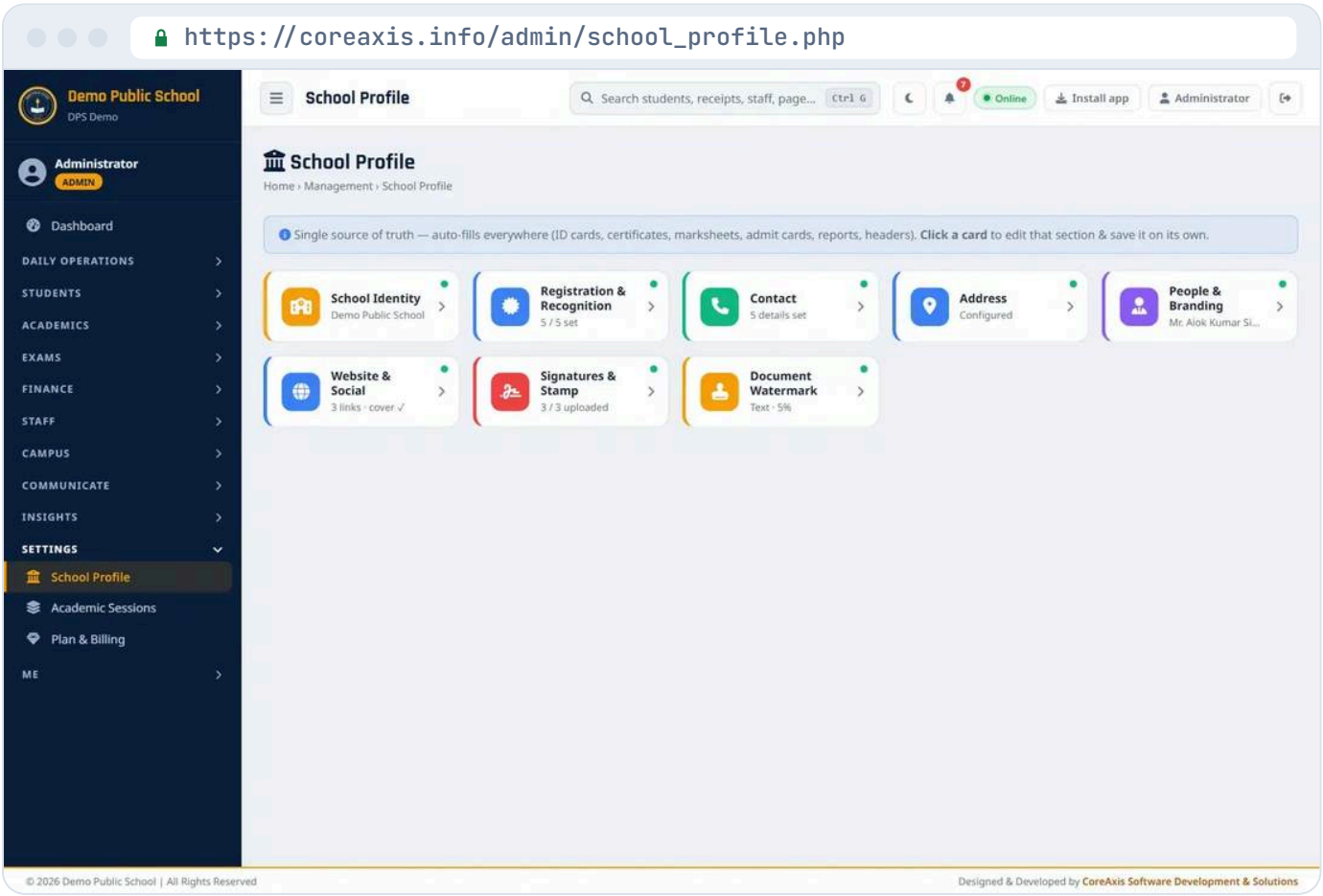
INSIGHTS & SETTINGS · CHAPTER 50

School Profile

Admin Principal MENU Settings › School Profile

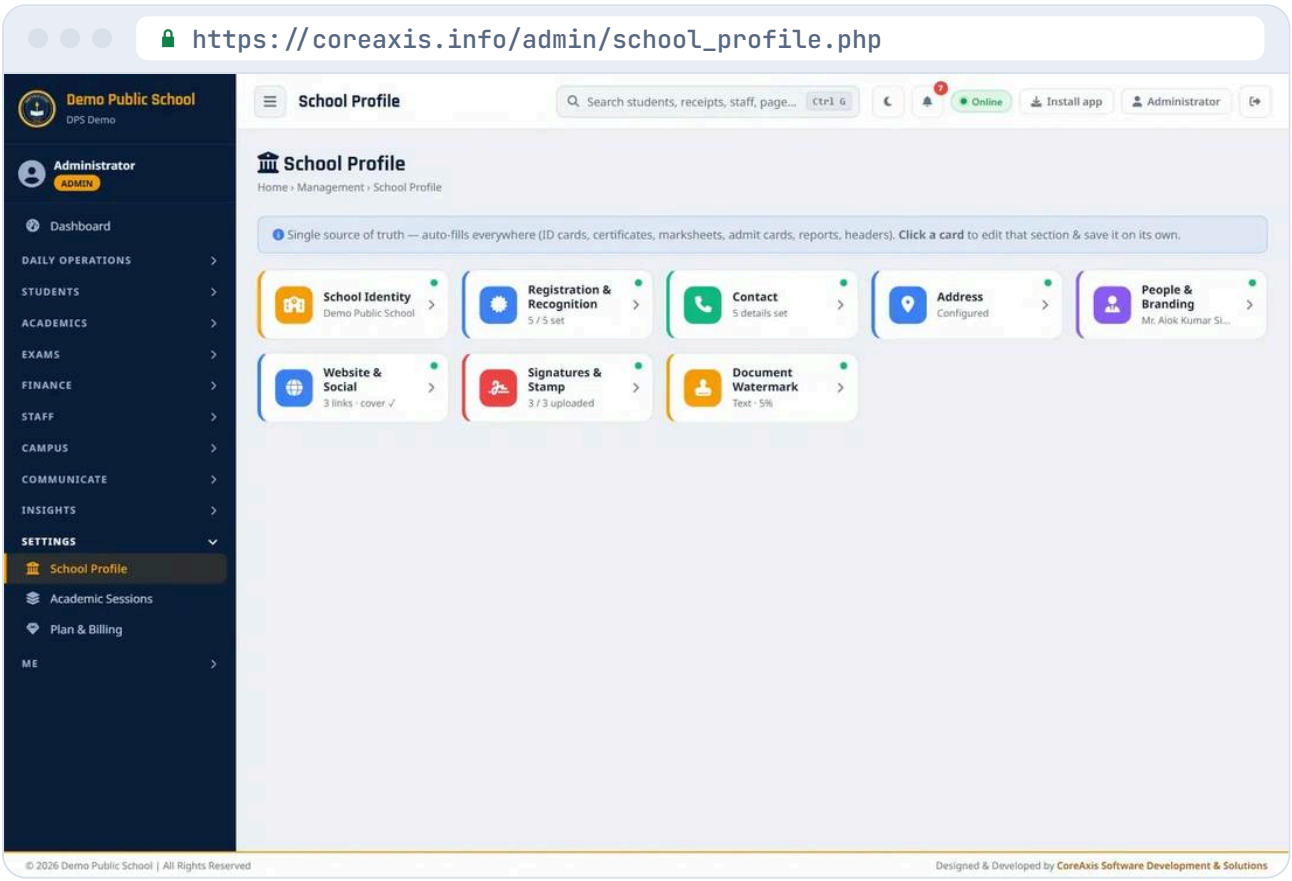
School Profile is the school's master record. Whatever you save here fills in automatically on ID cards, certificates, marksheets, admit cards, receipts, letters, reports, page headers and the school's public website. The page shows eight cards; click a card to open that section, change it, and click **Save This Section**. Only that section is saved. A green dot on a card means the section is filled.



School Profile — Demo Public School

Open and edit a section

1. Open **Settings › School Profile**. Each card shows a short summary (for example **Registration & Recognition 5 / 5 set**).



Eight section cards.

2. Click a card. Its form opens below the cards.
3. Change the fields you need.
4. Click **Save This Section** and confirm. Click **Close** to fold the section without saving.

> **TIP** Check spellings carefully: a wrong UDISE or affiliation number prints on every certificate and card.

School Identity

Name and basic facts of the school.

School Name *	Full name as on the affiliation (Demo Public School).

Short Name / Abbr.	Used where space is short and in reference numbers (DPS Demo).
Established Year / Affiliated Board / Medium / Classes Offered	2008, CBSE, English, Play Group to Class VIII.
Tagline / Motto	Printed under the name on the letterhead (Learn · Grow · Lead).
Report-card promotion rule	Aggregate (promote if overall is 33% or more, CBSE-style) or Subject-wise (must also pass every subject). Used on report cards and in class promotion.

Registration & Recognition

UDISE Code	11-digit UDISE+ code (10280110235).
Affiliation No. / Registration No. / School Code / Recognition No.	Board affiliation, society or trust registration, board school code and state recognition number. They print on ID cards, TCs, certificates and the letterhead.

Contact

Primary Phone *	Main office number (0612-2234567).
Alternate Phone / Mobile / WhatsApp	Other numbers shown on cards, receipts and the website.
Email / Alternate Email	School email (info@demo.coreaxis.info).
Website	The school website address.

Address

Address	Street and area (14, Boring Road, Near Patna Women's College).
City / District / State / PIN code	City, district, state and 6-digit PIN code. Together with the address they print on the letterhead, receipts and certificates.

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People & Branding

Director Name / Principal Name	Printed under the signatures on certificates, cards and letters.
Hostel Warden Name / Phone	Shown to hostel students in the app.
Upload New Logo	JPG / PNG / WEBP up to 2 MB. Used in headers, receipts, cards, certificates and the website. Leave empty to keep the current logo.

Website & Social

Facebook / Instagram / YouTube / X (Twitter) / LinkedIn URL	Social icons on the school's public website (top bar and footer).
Hero Cover Image	Wide photo (1600 px or wider) behind the school name at the top of the public website.

Signatures & Stamp

Upload transparent PNG images for the cleanest print.

Director Signature	Signature of the director.
Principal Signature	Printed on ID cards, report cards, certificates and leave sanction orders.
School Stamp / Seal	The round official seal, printed next to the signature.

Document Watermark

Watermark Type	None, Text, Picture (logo / image) or Small Tiles (repeat).
Watermark Text / Orientation / Opacity (%)	Text such as DPS Demo, Diagonal or Horizontal, and how light it is (5% in the demo school).
Tiles Content / Watermark Image	For tiles, repeat text or the logo; an uploaded image replaces the logo.

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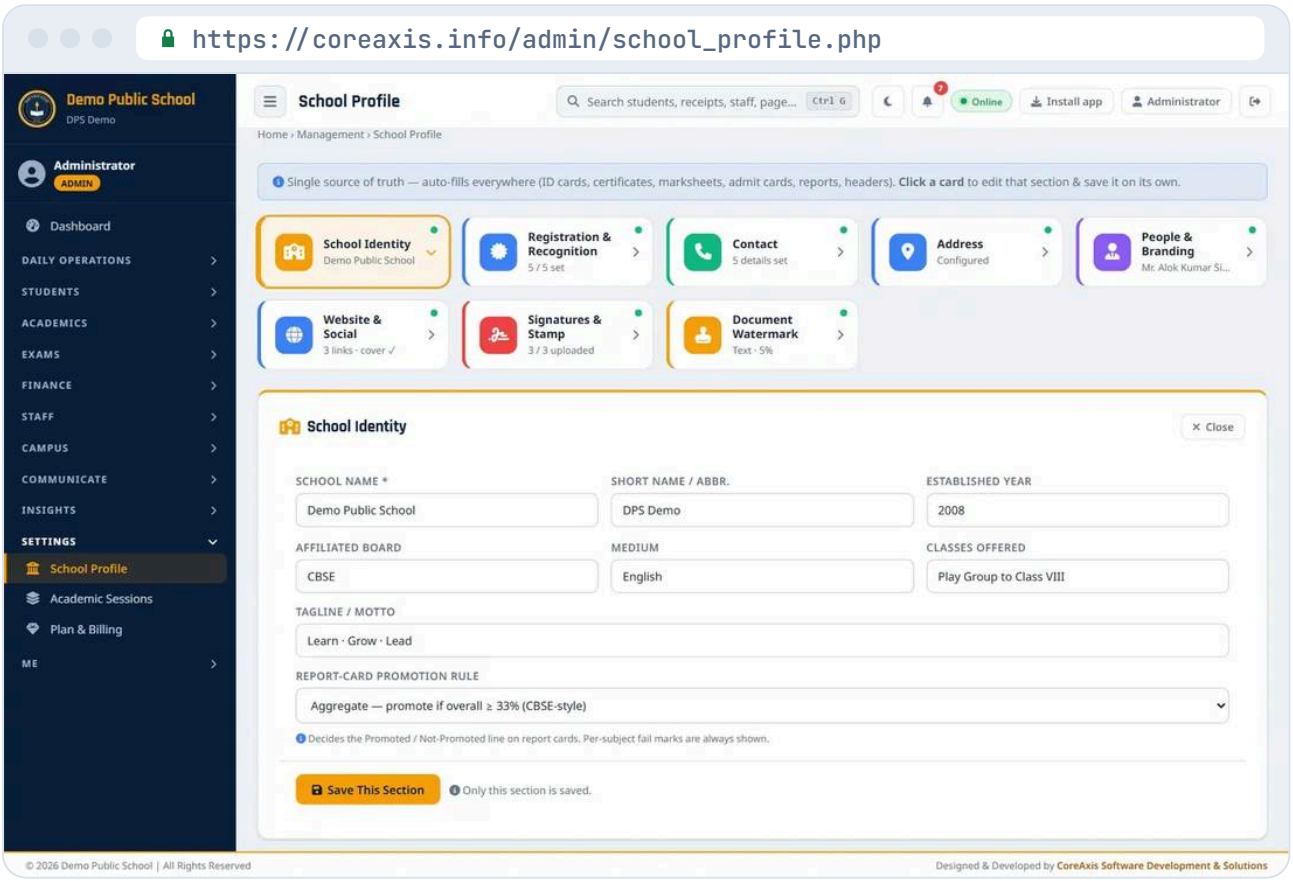
Each section, as it opens

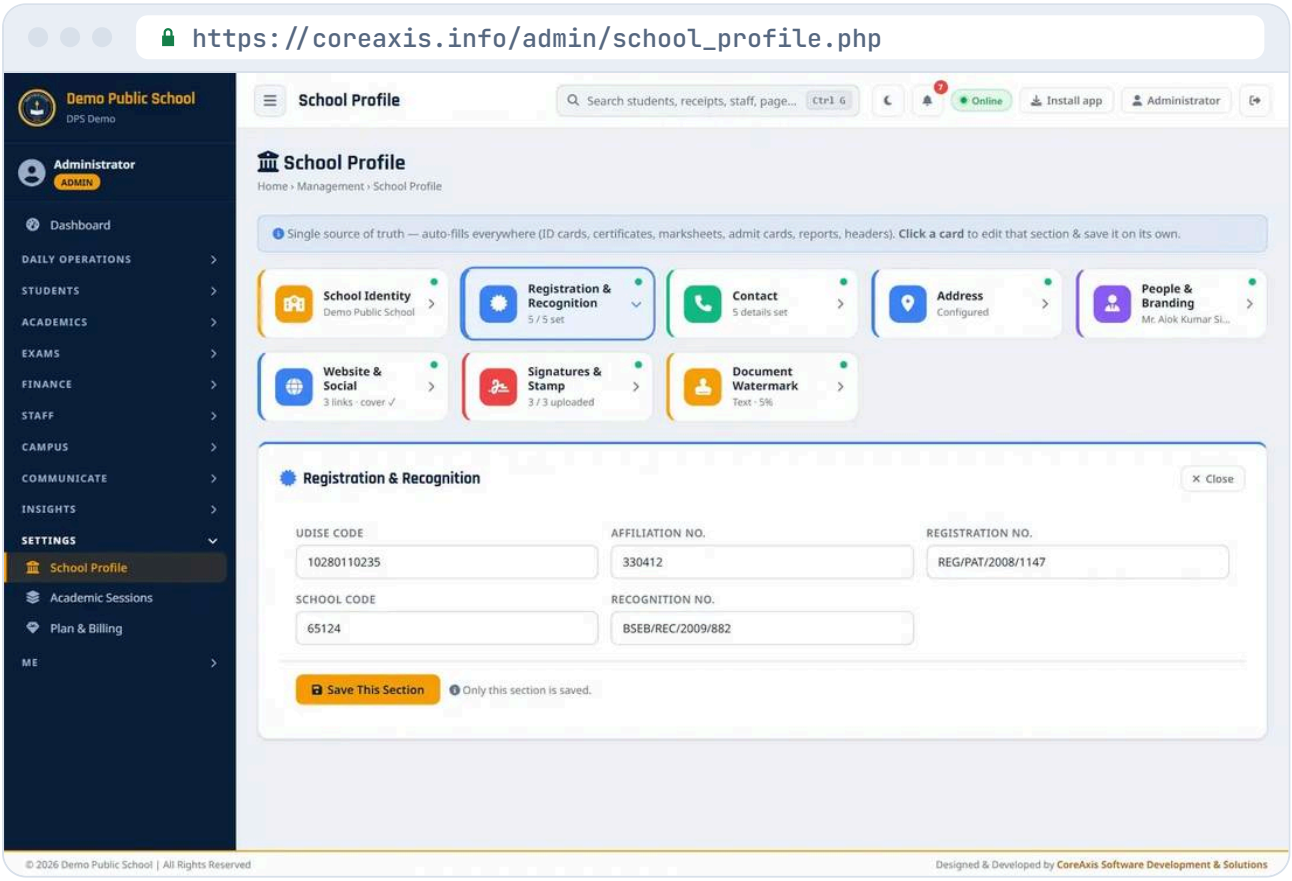
The demo school's saved values, shown for reference.

1 **School Identity**.



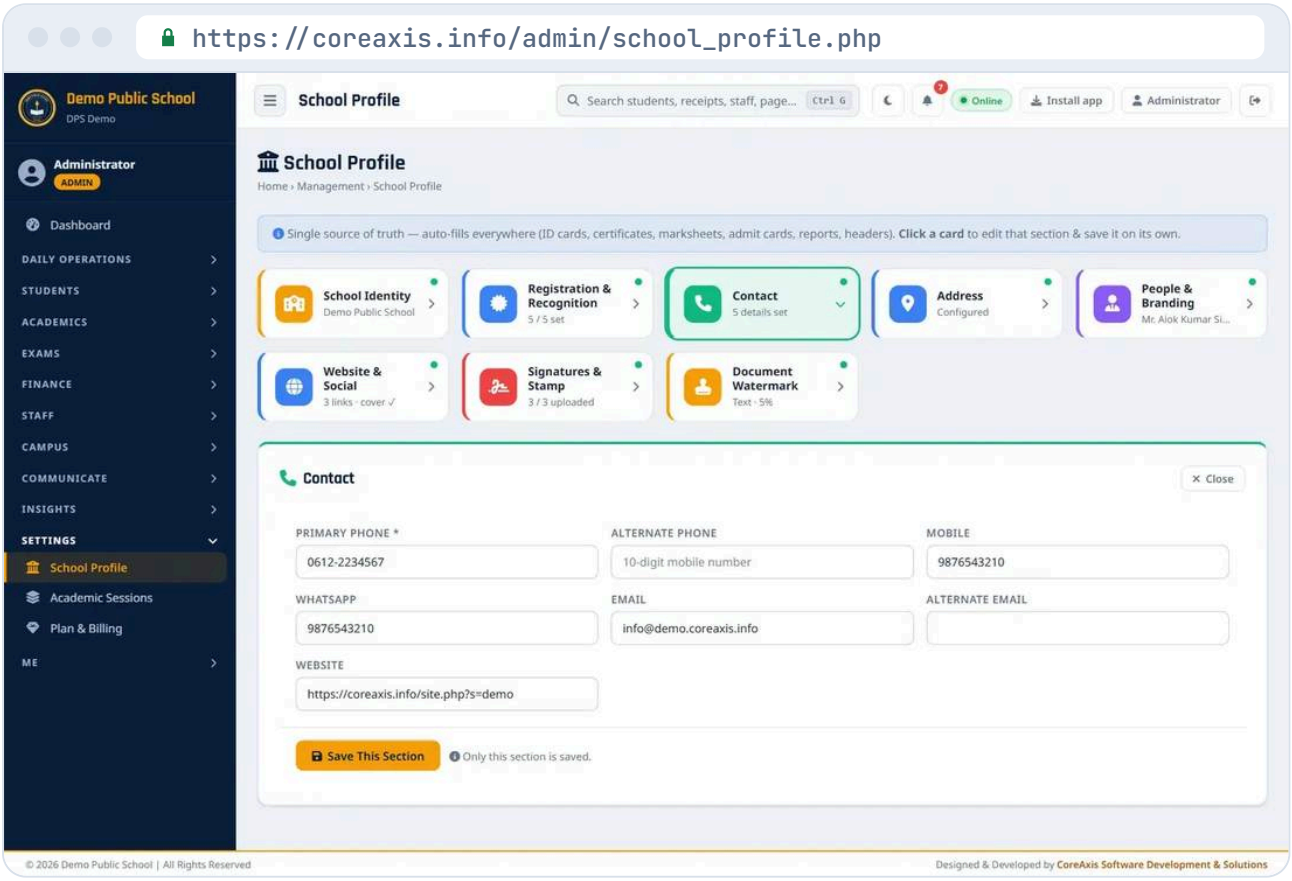
School Identity.

2 Registration & Recognition.



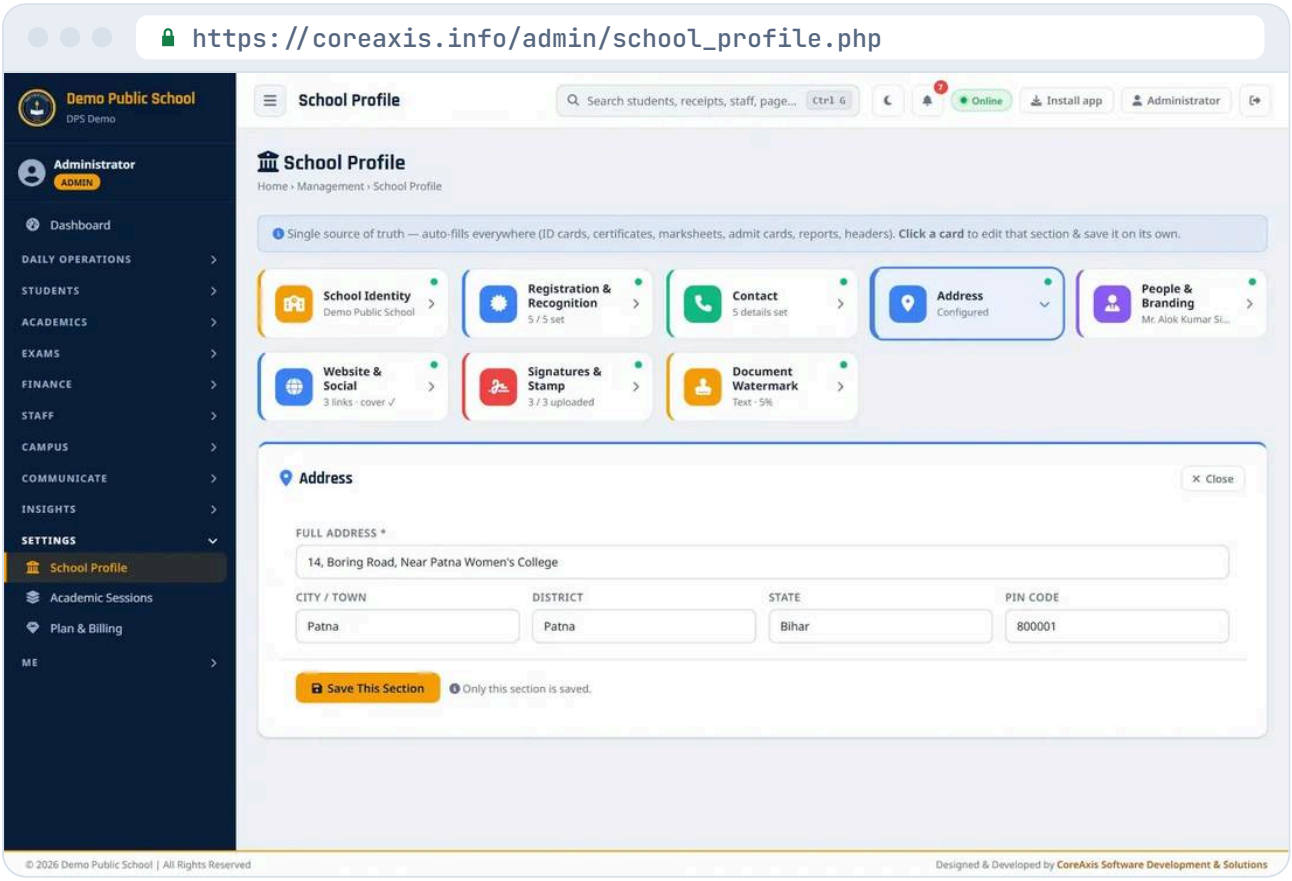
Registration & Recognition.

3 Contact.



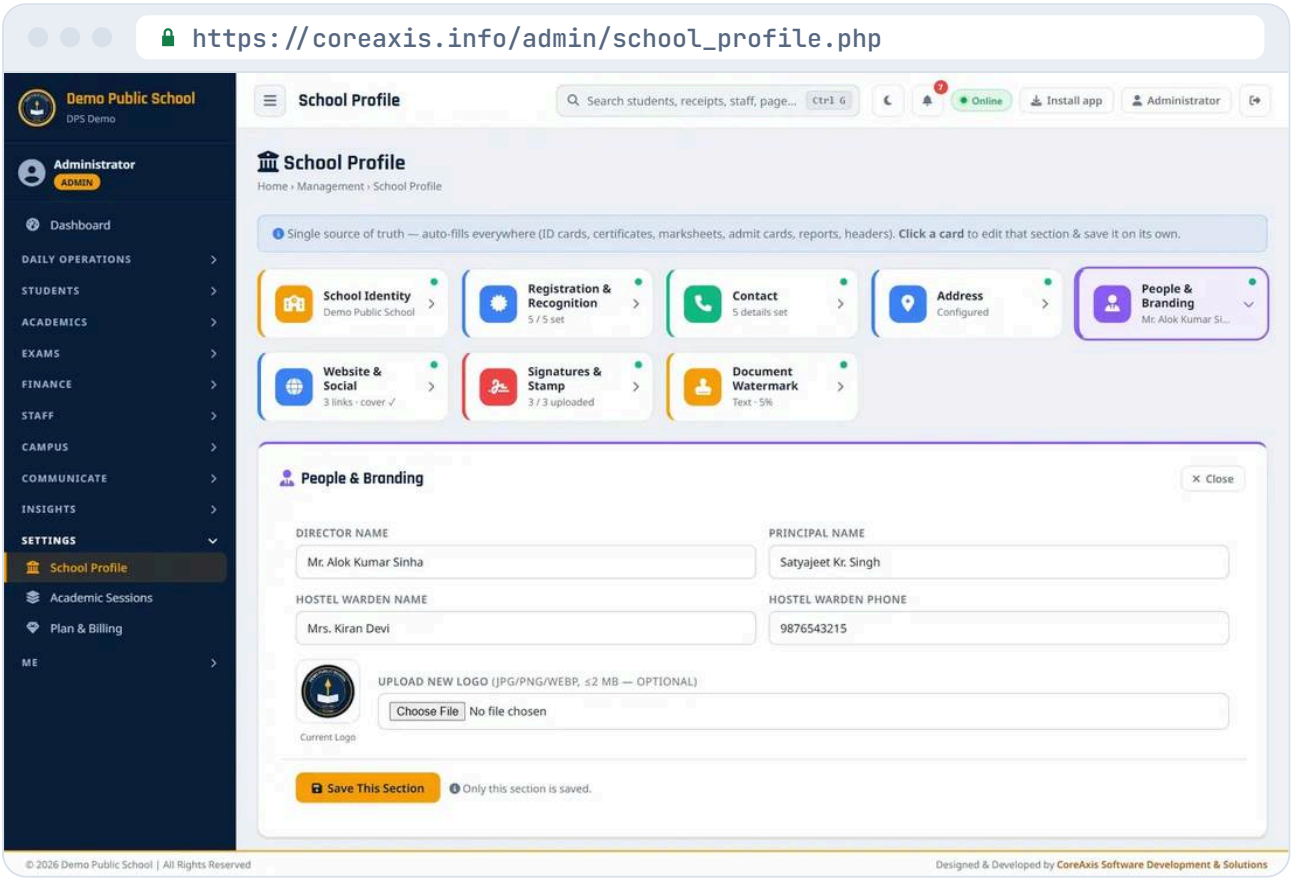
Contact.

4 Address.



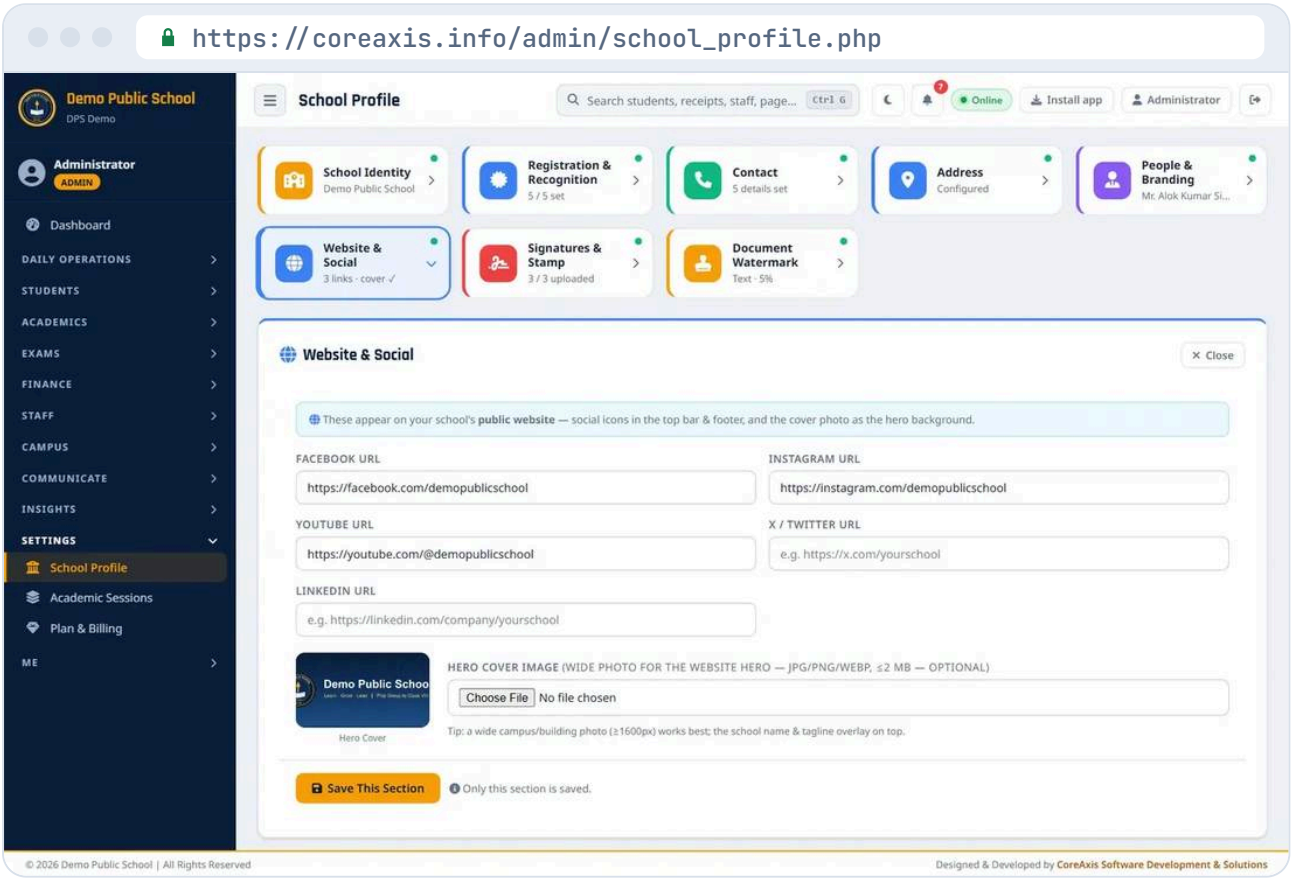
Address.

5 People & Branding.



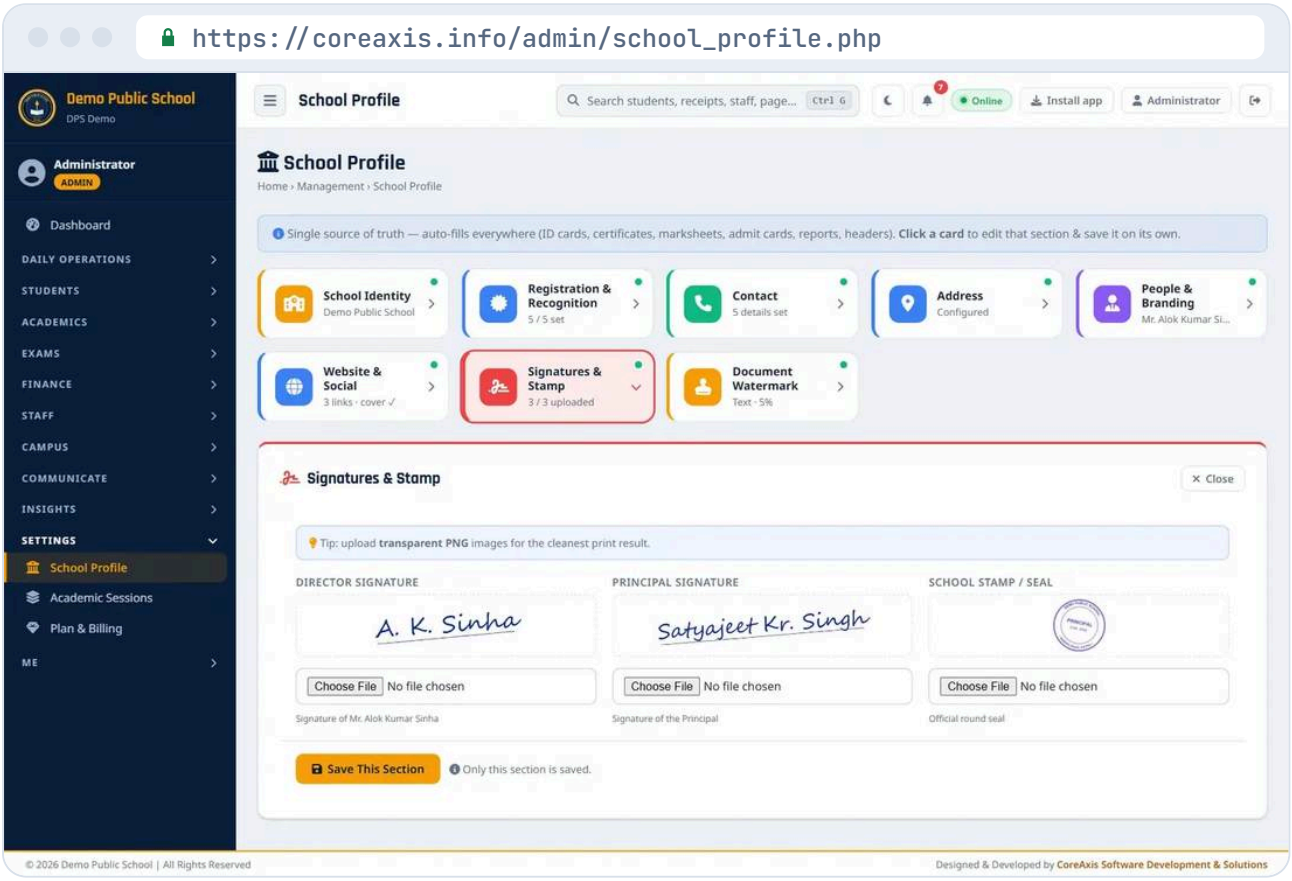
People & Branding with the current logo.

6 Website & Social.



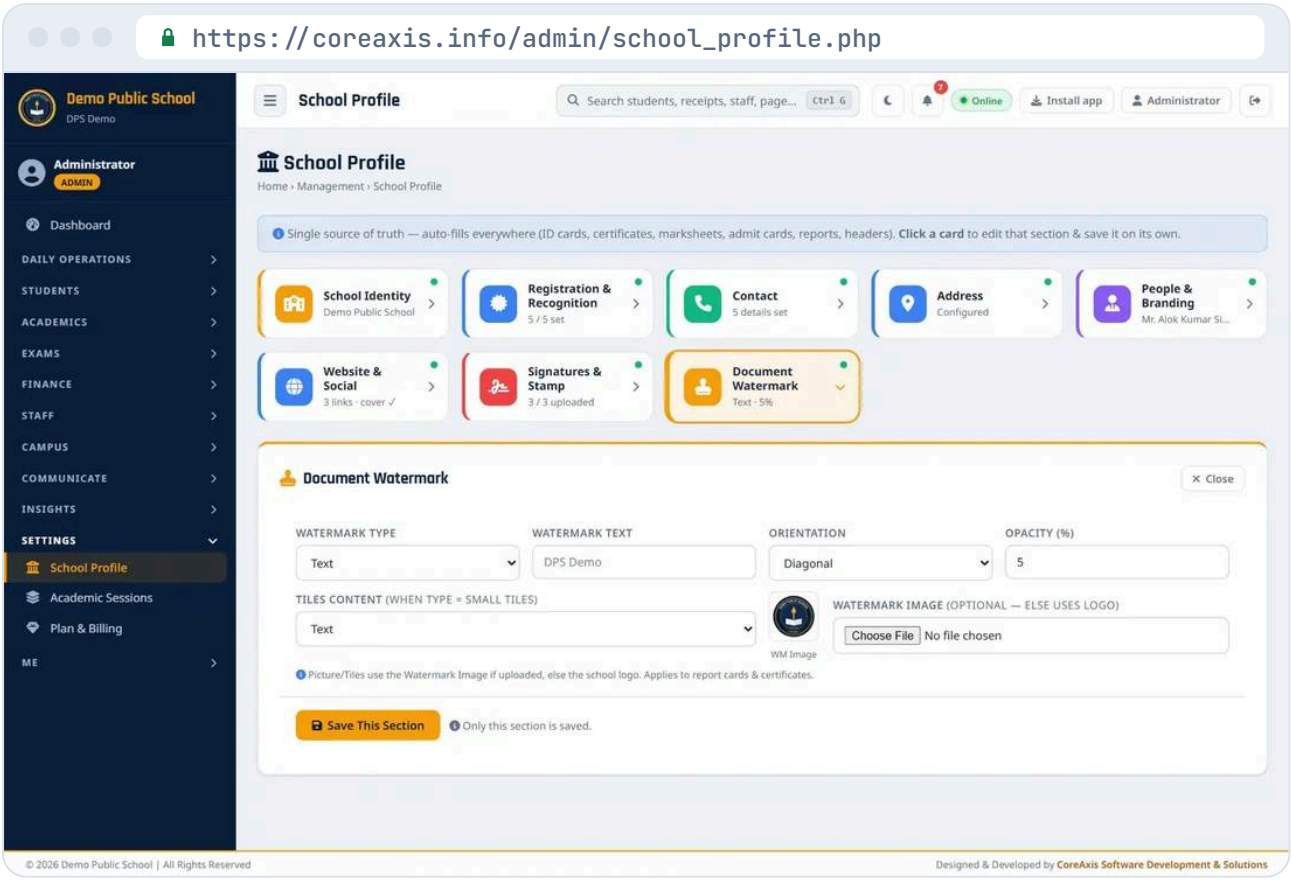
Website & Social with the hero cover.

7 Signatures & Stamp.



Director and principal signatures and the seal.

8 Document Watermark.



Text watermark, diagonal, 5%.

Questions

I changed the logo but an old card still shows the old one.

Printouts made before the change keep the old logo. Print the document again.

Who can change the School Profile?

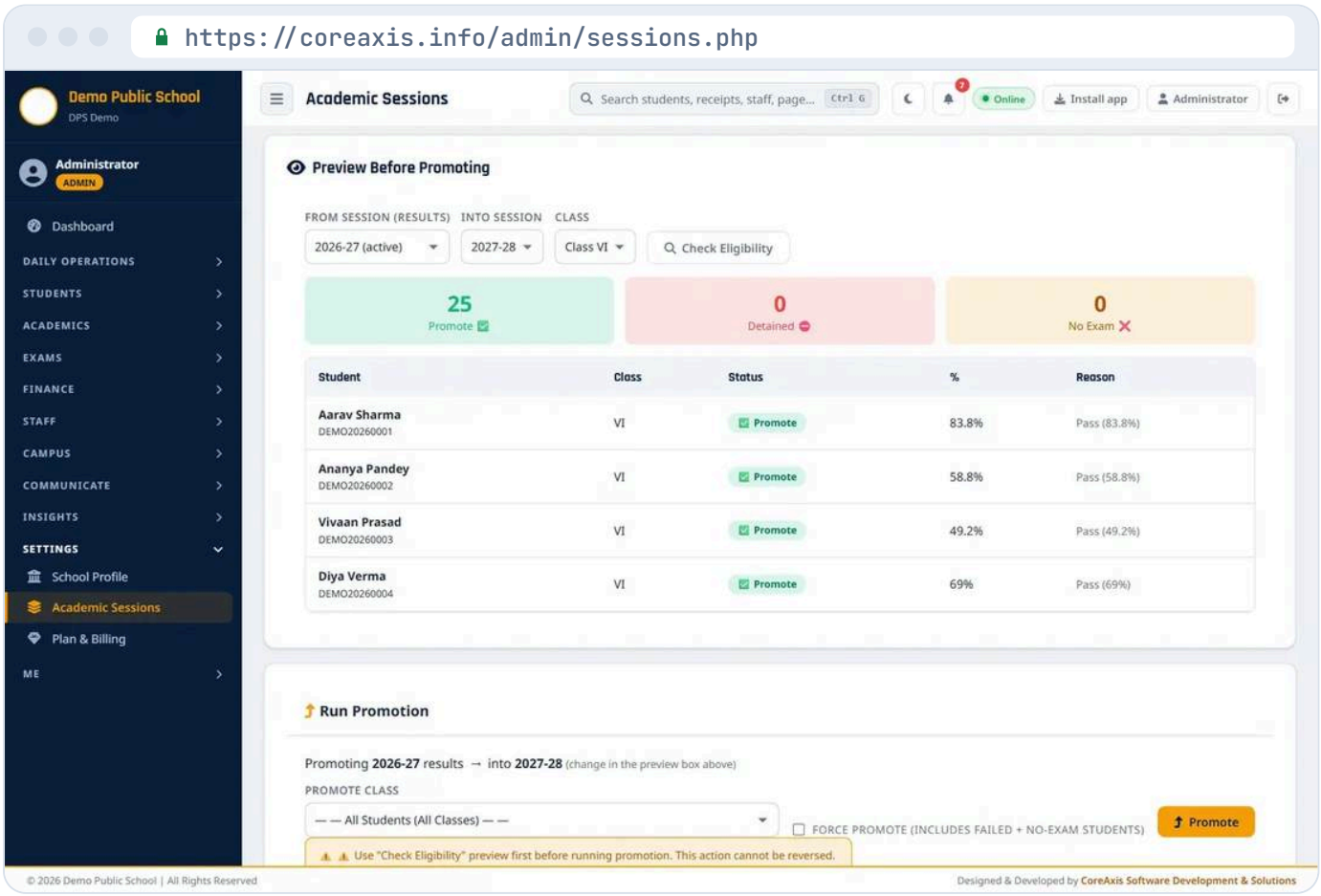
Admin-level users (Administrator, Principal, Vice Principal). Teachers and accountants cannot open it.

INSIGHTS & SETTINGS · CHAPTER 51

Academic Sessions

Admin Principal MENU Settings › Academic Sessions

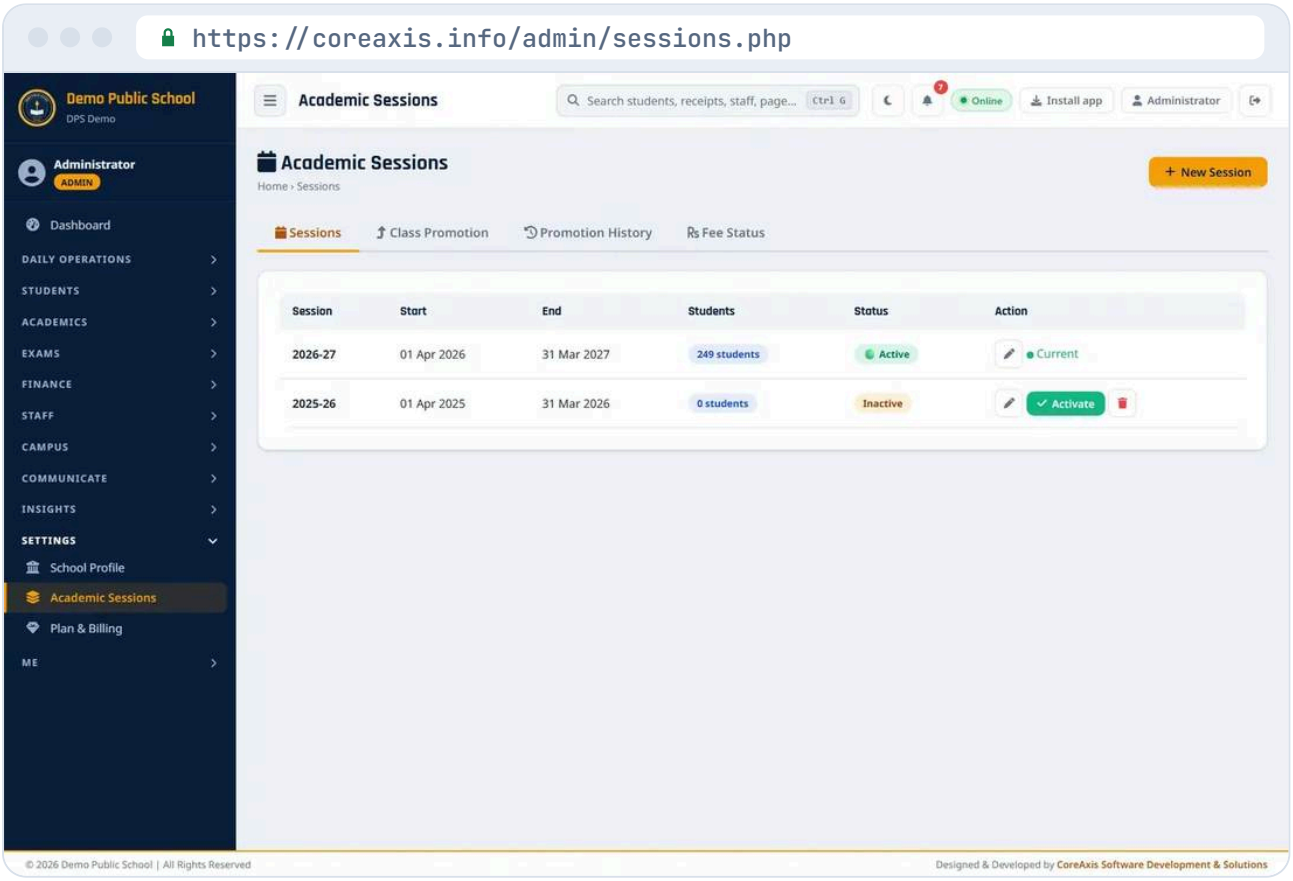
An academic session is the school year (for example 2026-27, 1 April 2026 to 31 March 2027). Fees, attendance, exams and reports belong to a session, and only one session is active at a time. At the end of the year you create the next session, check promotion eligibility from the Annual exam results, promote the students into the new session, and then activate it. Old-session dues stay in the old session and show as **Arrears** in the new one.



Academic Sessions — Demo Public School

Create the next session (example: 2027-28)

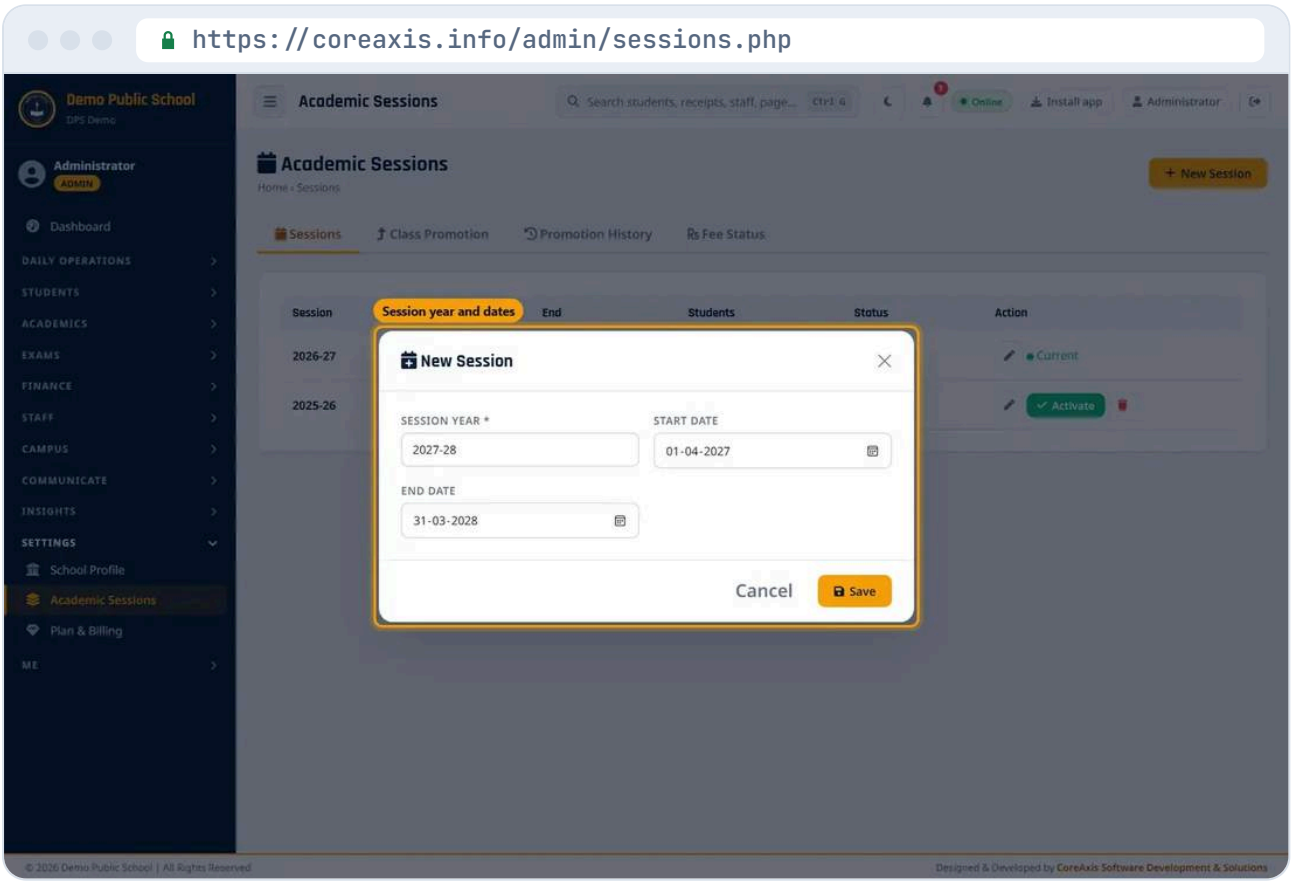
1 Open **Settings › Academic Sessions**. The **Sessions** tab lists each session with dates, number of students and status. The current one shows **Active** and **Current**.



Sessions list: 2026-27 is active.

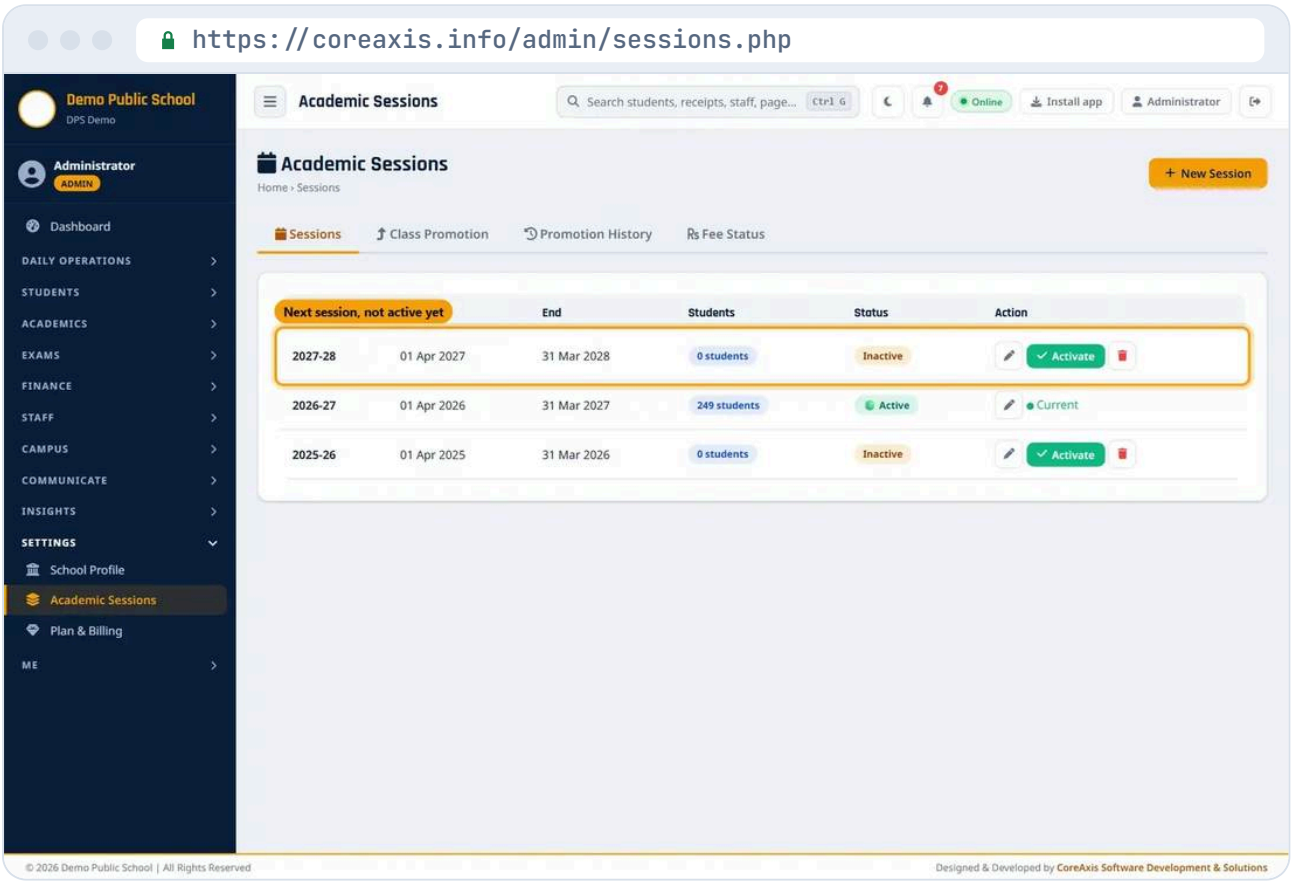
2 Click **New Session**.

3 Type the **Session Year** (2027-28) and check **Start Date** (01-04-2027) and **End Date** (31-03-2028).



New Session form.

4 Click **Save** and confirm. The message **Session added!** appears. The new session is **Inactive**, so nothing changes for anyone yet.



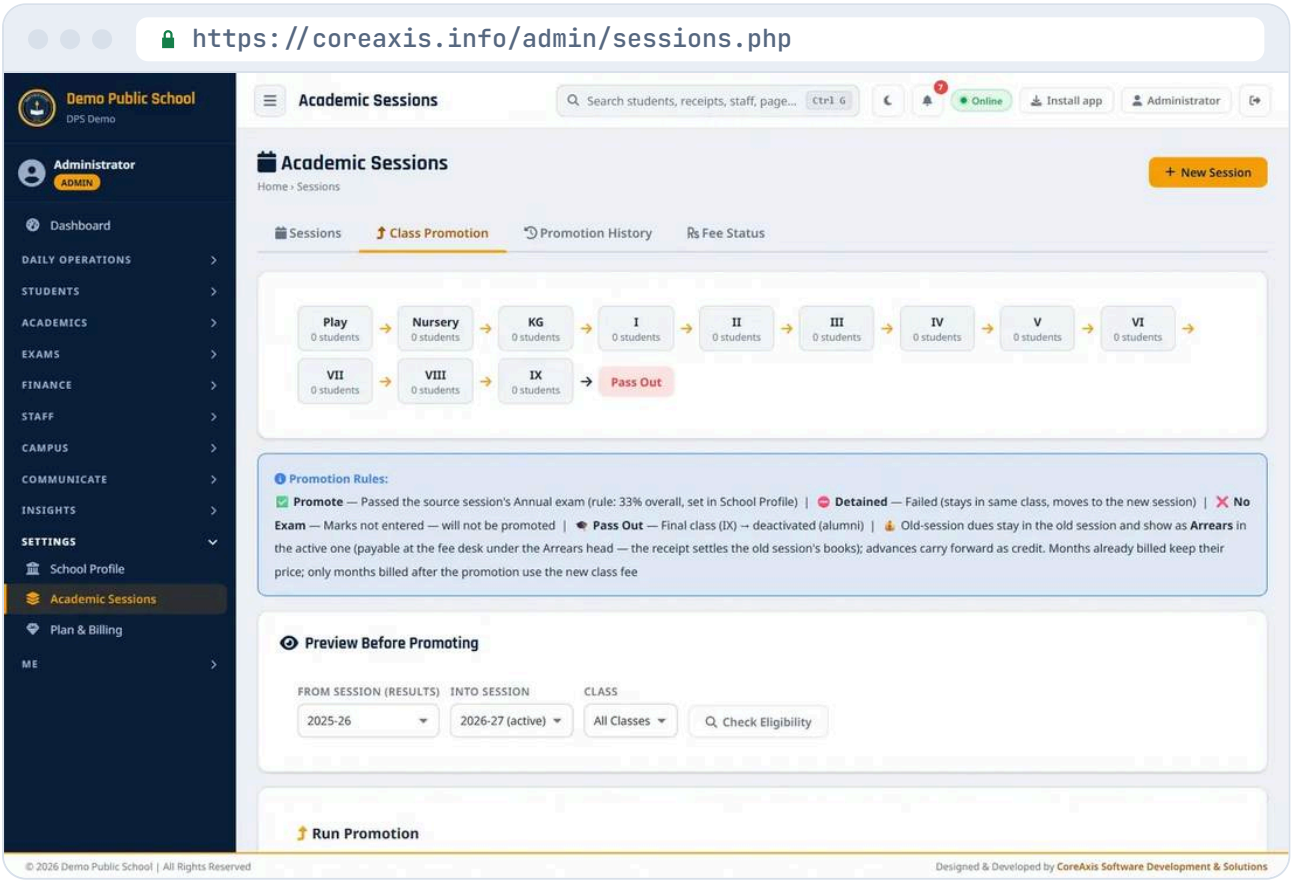
2027-28 added, not active.

TIP Create the next session in March, before promotion. Fee Structure for the new session can then be set up in advance.

Check promotion eligibility (example: Class VI, 2026-27 results into 2027-28)

This check only reads results; it changes nothing.

1 Open the **Class Promotion** tab. The top strip shows the class order (Play → Nursery → … → the last class → **Pass Out**) and the number of students in each class.

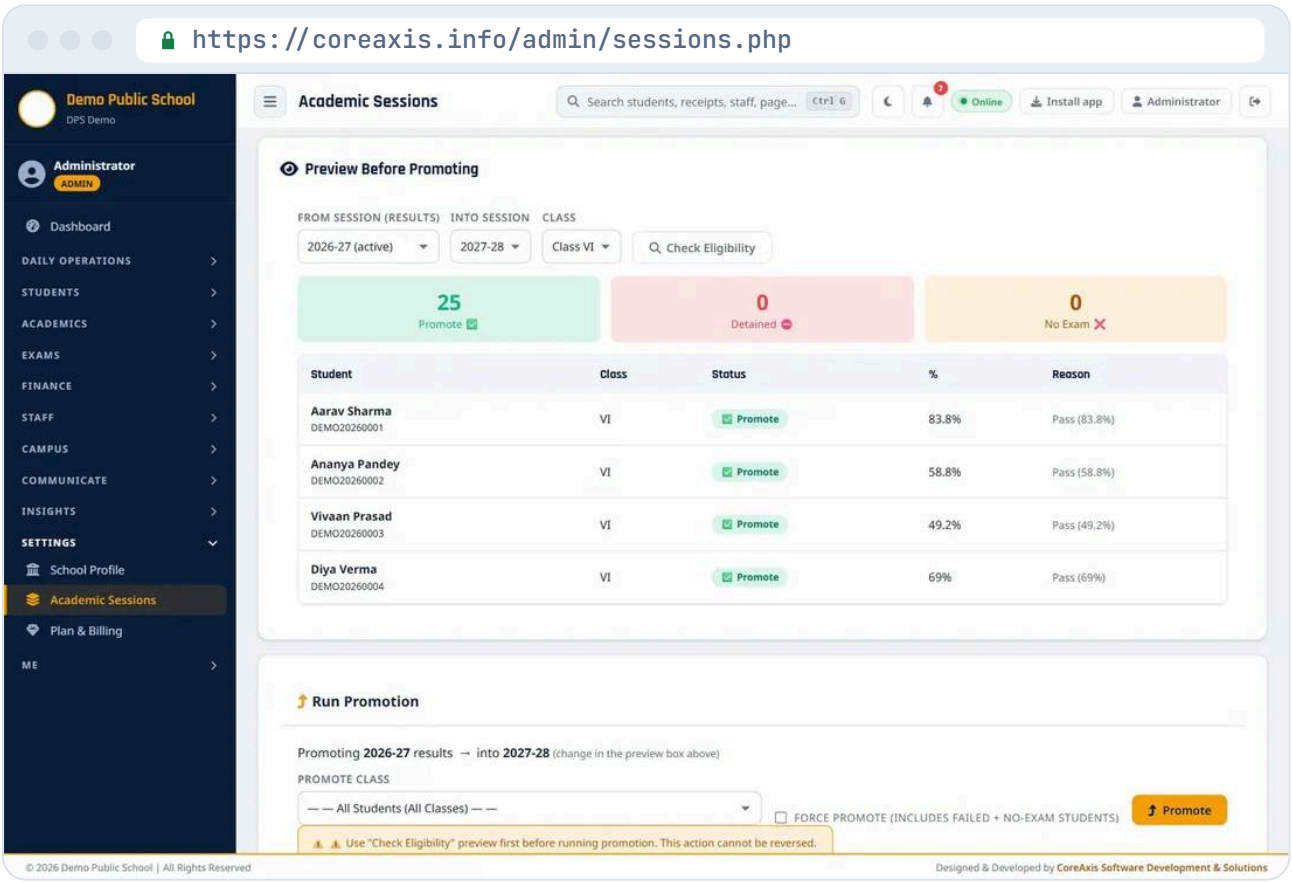


Class progression and promotion rules.

2 Read **Promotion Rules**: **Promote** = passed the Annual exam by the rule set in School Profile (33% overall, or every subject); **Detained** = failed, stays in the same class in the new session; **No Exam** = no marks entered, not promoted; **Pass Out** = final class, becomes alumni.

3 Under **Preview Before Promoting**, choose **From Session (results)** (2026-27 (active)), **Into Session** (2027-28) and **Class** (Class VI).

4 Click **Check Eligibility**. The boxes count **Promote**, **Detained** and **No Exam**, and the table lists each student with percentage and reason.



Class VI: 25 can be promoted, none detained.

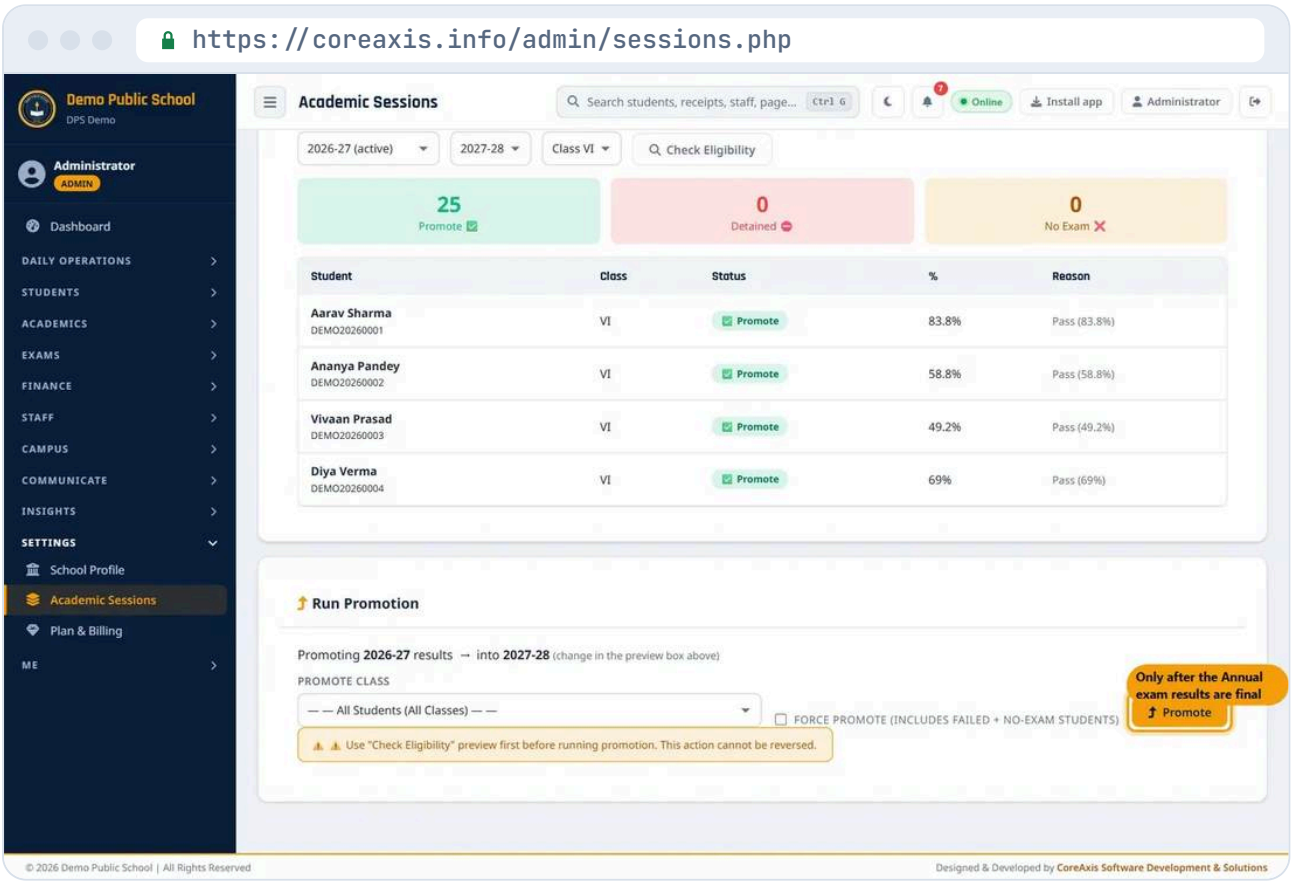
5 If students show **No Exam**, finish marks entry for the Annual exam first, then check again.

Run the promotion (year end only)

Do this once a year, after Annual exam results are final and the new session exists. It was not run for this manual.

1 Under **Run Promotion**, check the line **Promoting 2026-27 results → into 2027-28**. If it says **Choose a target session**, create the next session first.

2 In **Promote Class**, choose **Only Class VI** (one class at a time is safest), or **All Students (All Classes)**.

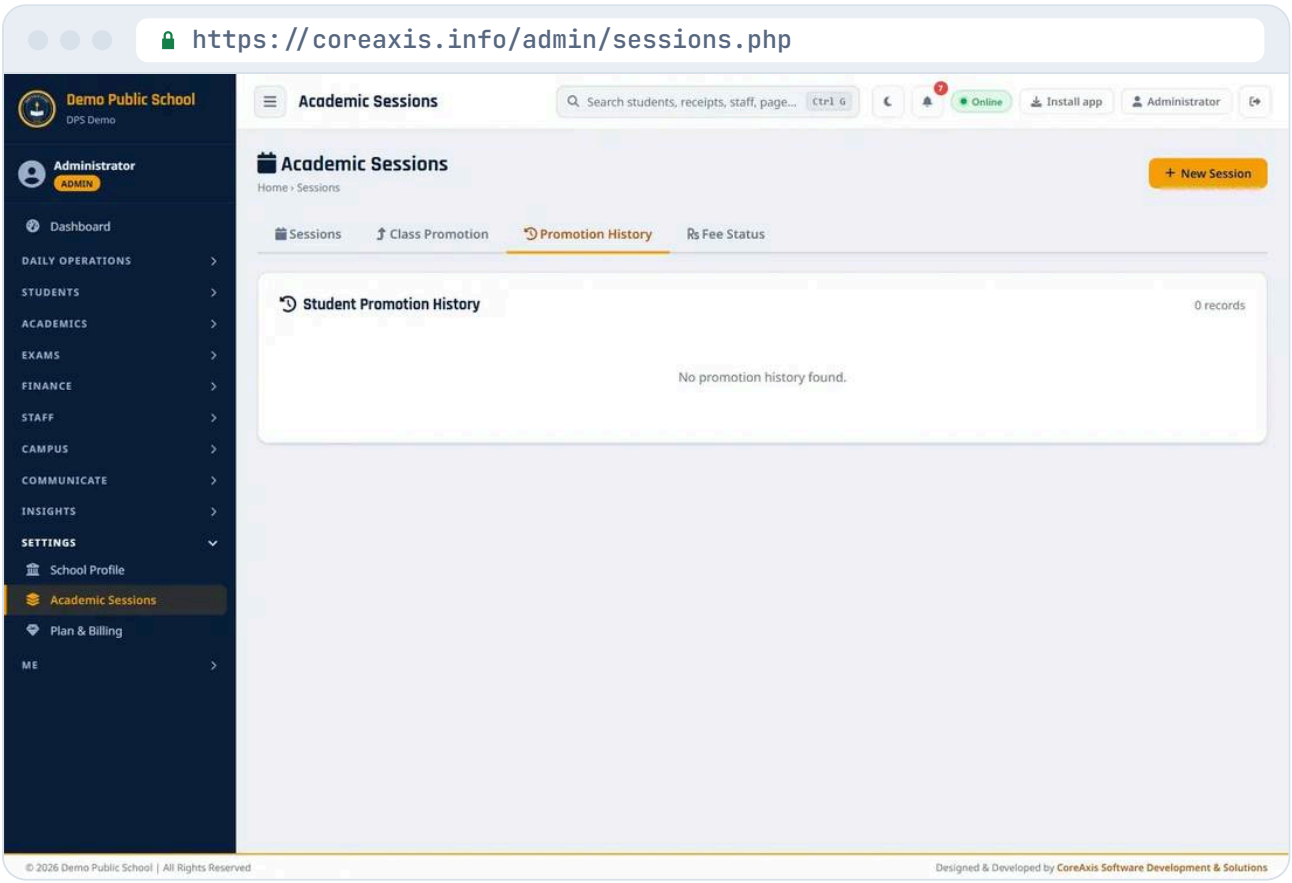


Run Promotion with the warning.

3 Leave **Force promote (includes failed + no-exam students)** unticked, unless the school has decided to promote everyone (for example under a no-detention rule).

4 Click **Promote**. Read the popup (Pass → Promote · Fail → Detained · No Exam → Skip) and confirm.

5 Open **Promotion History** to check each student's from-class, to-class, status and percentage.



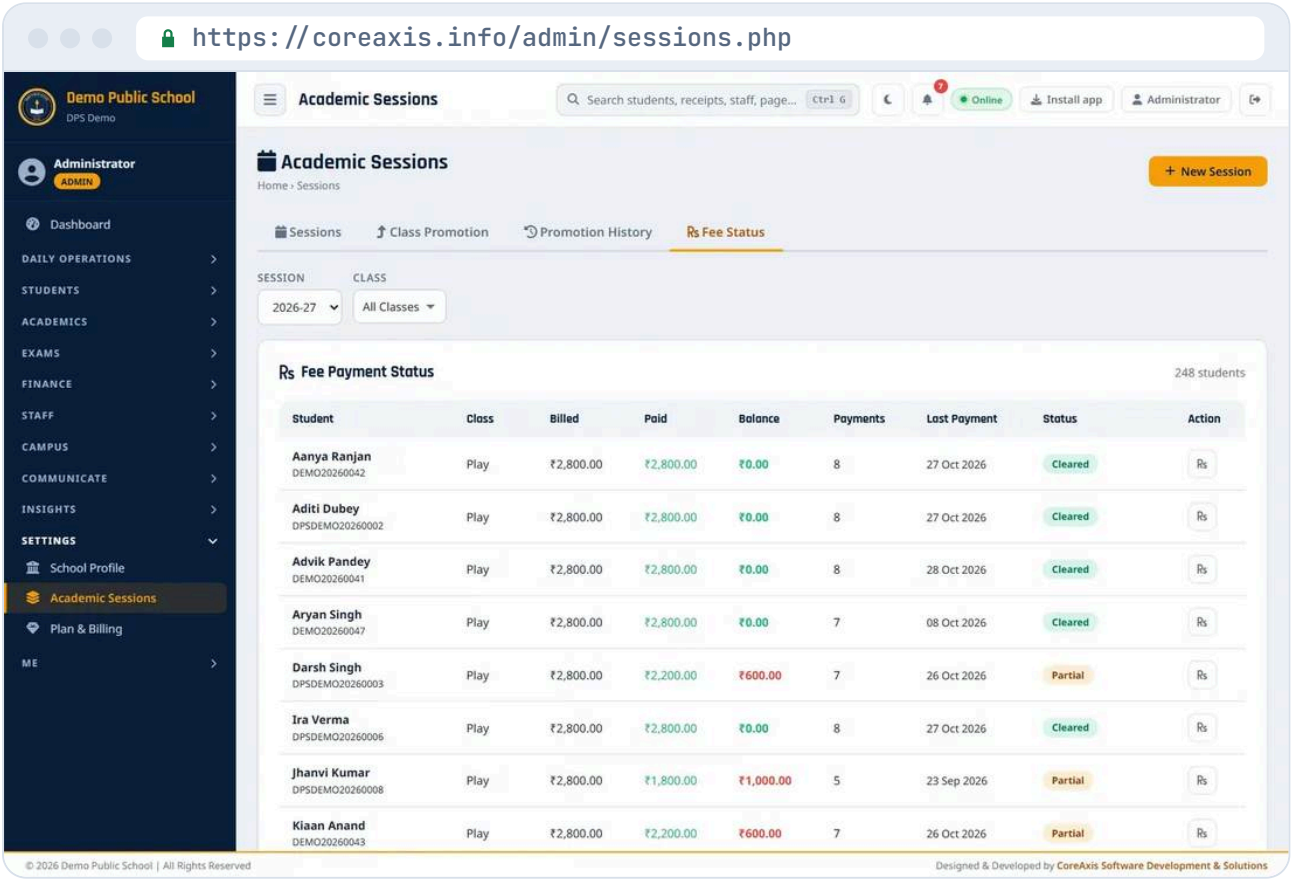
Promotion History (empty until a promotion is run).

6 When every class is done, go back to **Sessions** and click **Activate** on 2027-28. The old session becomes inactive.

IMPORTANT Promotion cannot be reversed. Run Check Eligibility for every class first, and make sure all Annual exam marks are entered.

Fee status of a session

1. Open the **Fee Status** tab. Choose the **Session** and, if needed, a **Class**.



Billed, Paid, Balance and status per student.

2. Students marked **Partial** or with a balance still owe money. Click the rupee icon to open the Fee Desk for that student.

3. Use this list before the rollover: unpaid amounts move to the new session as **Arrears**.

Screen at a glance

Sessions tab	Session, Start, End, Students, Status (Active / Inactive), Edit, Activate, Delete.
Class Promotion tab	Class progression, Promotion Rules, Preview Before Promoting, Run Promotion.
Promotion History tab	Student, From Class, To Class, Status, %, Date, Remarks, and manual Promote for a detained student.

Fee Status tab	Student, Class, Billed, Paid, Balance, Payments, Last Payment, Status (Cleared / Partial), Collect Fee.

Questions

One detained student passed the re-test.

Open Promotion History and click Promote on that student's row.

We activated the new session by mistake.

Click Activate on the old session again. Activation only switches which session is current; promotions already run are not undone.

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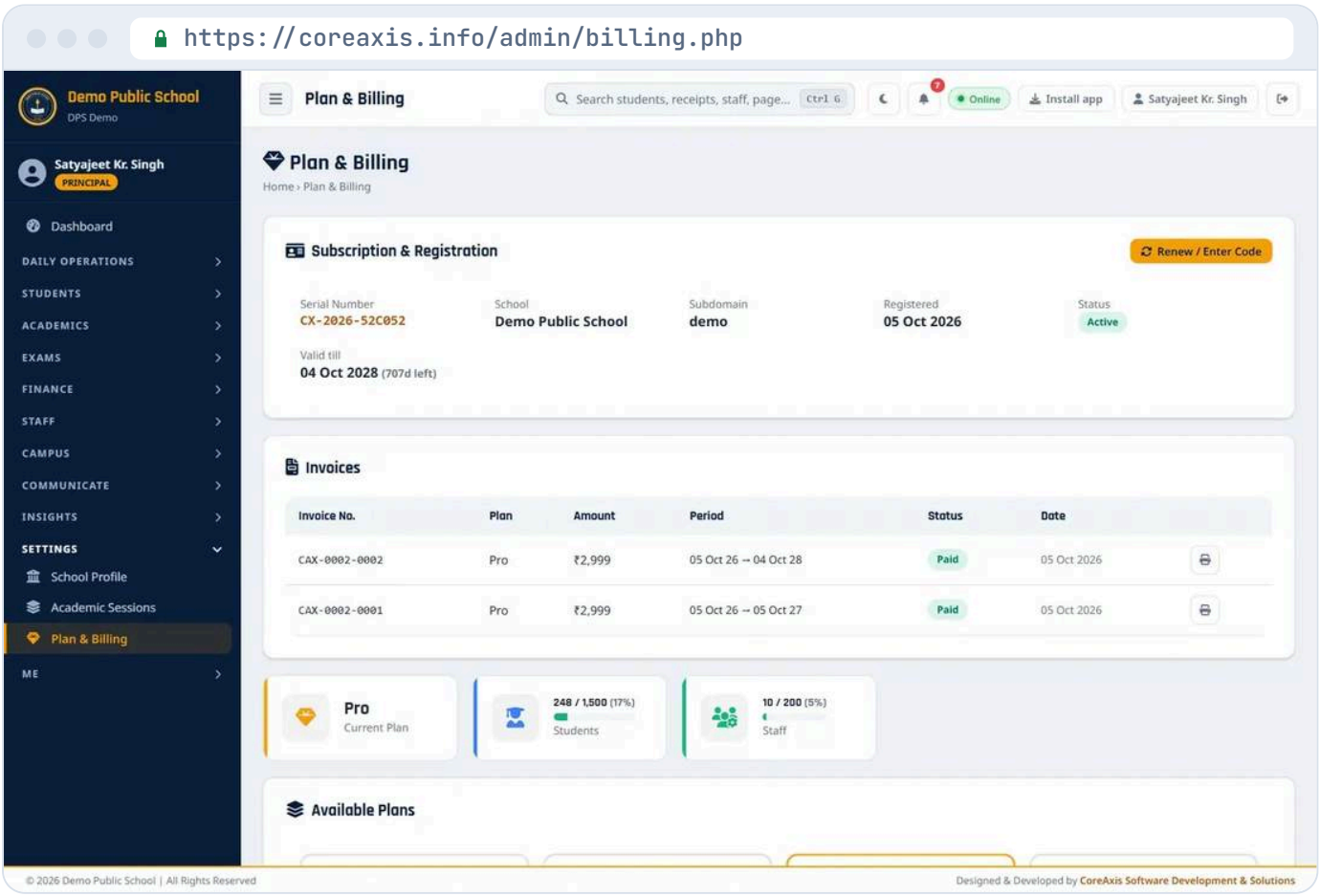
INSIGHTS & SETTINGS · CHAPTER 52

Plan & Billing

Admin Principal MENU Settings › Plan & Billing

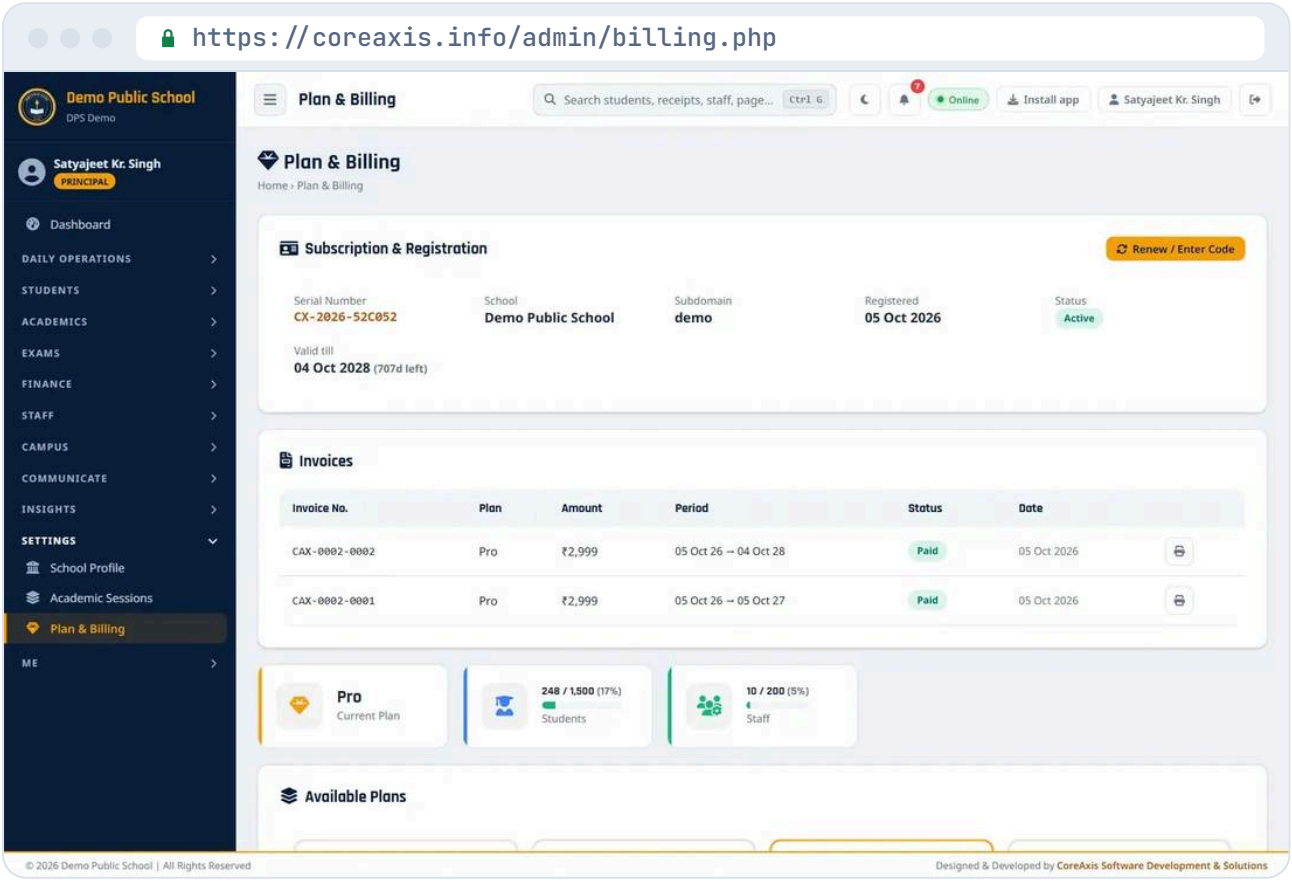
Plan & Billing shows the school's CoreAxis subscription: serial number, subdomain, registration date, status and the date it is valid till. It lists the invoices paid, how many students and staff the plan allows and uses, and the plans on offer. Renewals are made with an activation code or, when enabled, by online payment.



Plan & Billing — Demo Public School

Check the subscription and invoices

1. Open **Settings › Plan & Billing**.



Subscription & Registration, Invoices and usage.

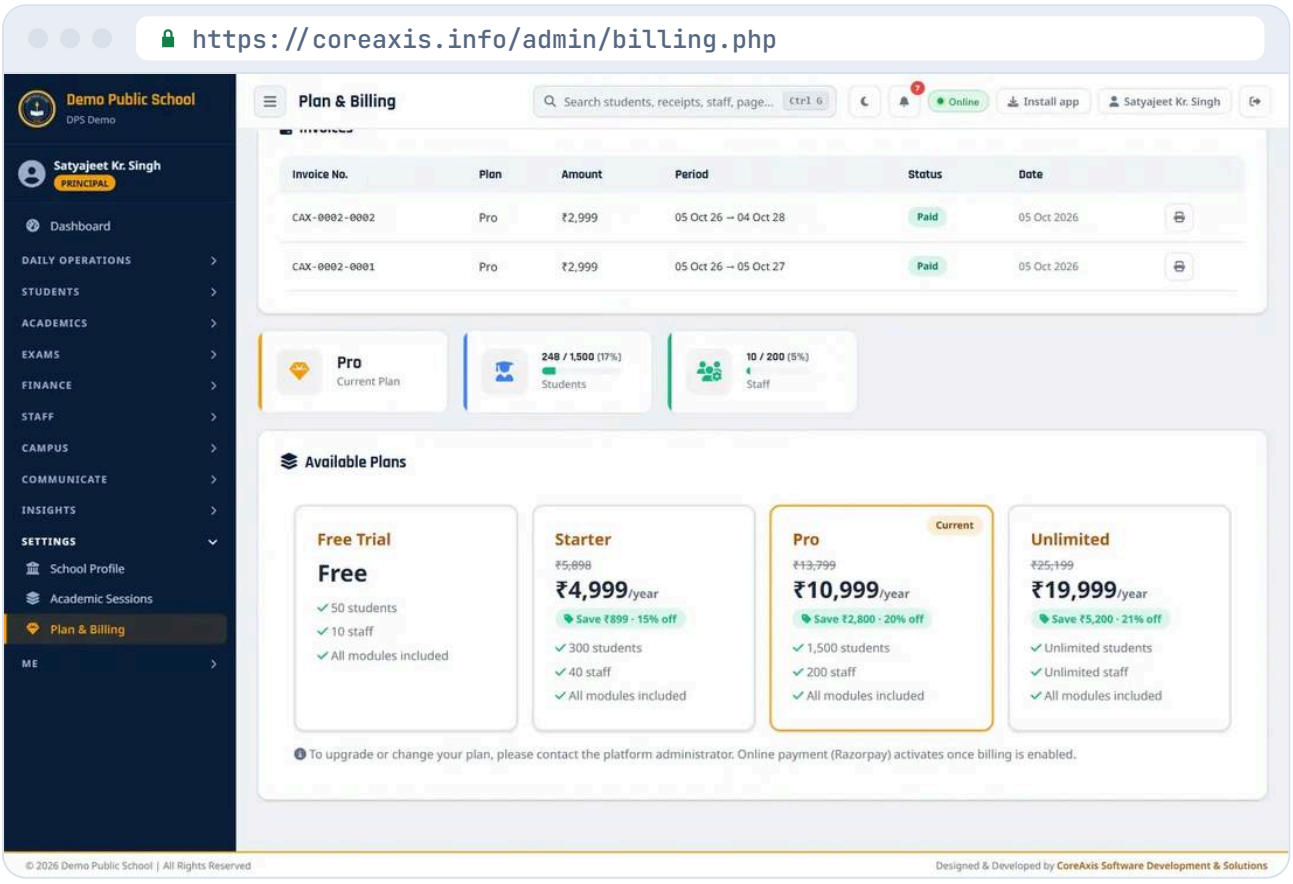
2. Under **Subscription & Registration**, read the **Serial Number**, **School**, **Subdomain**, **Registered** date, **Status** and **Valid till** (with days left).

3. Under **Invoices**, click the print icon (**View / Print**) on a row to open the GST invoice for your records.

4. Read the usage cards: **Students** (for example 248 / 1,500) and **Staff** (10 / 200) against your plan limits.

Compare plans and renew

1. Scroll to **Available Plans**: Free Trial, Starter, Pro and Unlimited, with yearly price, saving and student / staff limits. **Current** marks your plan.



Available Plans.

2. To renew or upgrade, click **Renew / Enter Code** and type the activation code you received from CoreAxis, or pay online if your school has online payment enabled.

3. For a change of plan, contact the CoreAxis team; the page says so under the plans.

TIP Reminder emails are sent before the expiry date. After expiry there is a short grace period in read-only mode, so renew in time.

TIP When the student or staff limit is reached, adding new students or staff is blocked until you upgrade.

Screen at a glance

Serial Number / Subdomain	Your school's CoreAxis ID and web address (subdomain.coreaxis.info).
Status / Valid till	Active, Trial, Grace or Expired, and the last valid date.
Invoices	Invoice No., Plan, Amount, Period, Status (Paid), Date, View / Print.
Current Plan / Students / Staff	Plan name and used / allowed counts with a bar.
Available Plans	All plans include all modules; they differ in student and staff limits.

Questions

Can the accountant see Plan & Billing?

No. Only admin-level users (Administrator, Principal, Vice Principal) see this page.

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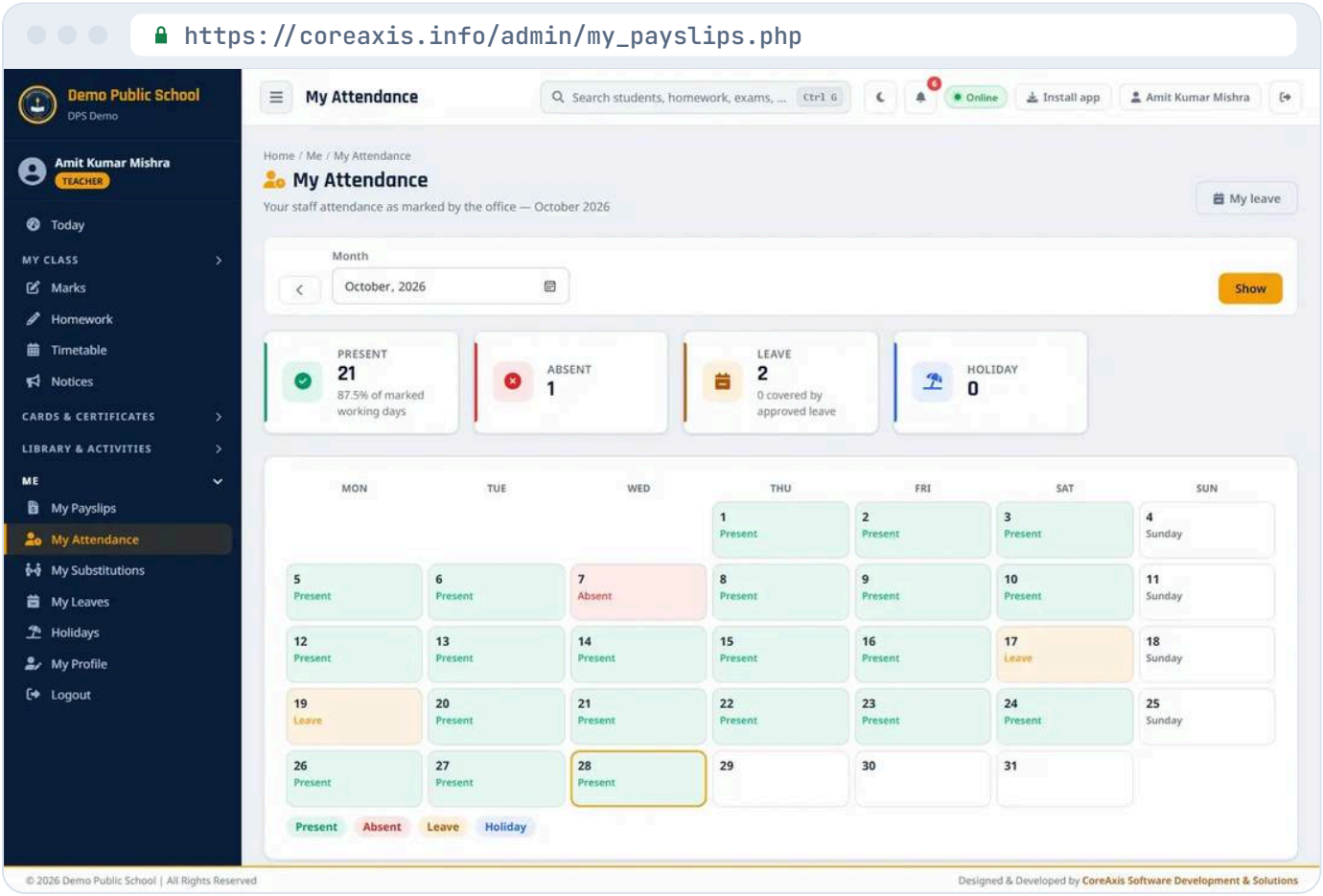
MY ACCOUNT · CHAPTER 53

My Account (Me menu)

Admin | Principal | Teacher | Accountant

MENU Me › My Payslips / My Attendance / My Substitutions / My Leave / My Profile

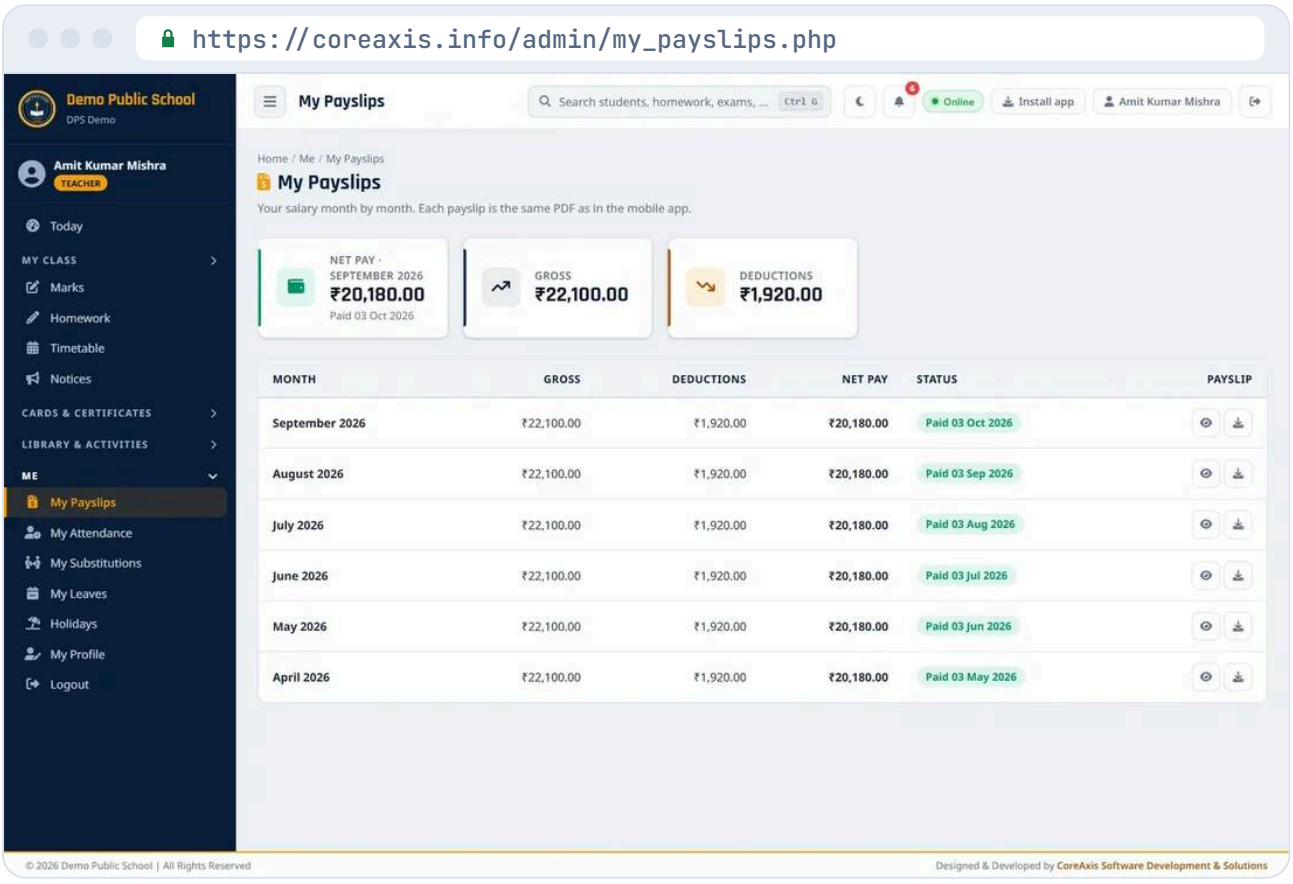
The **Me** group at the bottom of the menu is the same for every staff member, from the principal to a teacher or accountant. It shows only your own records: your salary slips, your attendance as marked by the office, the substitution periods given to you, your leave, and your profile and sign-in settings. The example below is Amit Kumar Mishra, TGT Mathematics.



My Account (Me menu) — Demo Public School

My Payslips: view or download a salary slip

1. Open **Me › My Payslips**. The top cards show the latest month's **Net Pay**, **Gross** and **Deductions** (September 2026: net ₹20,180.00, paid 03 Oct 2026).



One row per month, newest first, with gross, deductions, net pay and paid date.

2. The months are listed newest first: September 2026, August 2026 … April 2026.

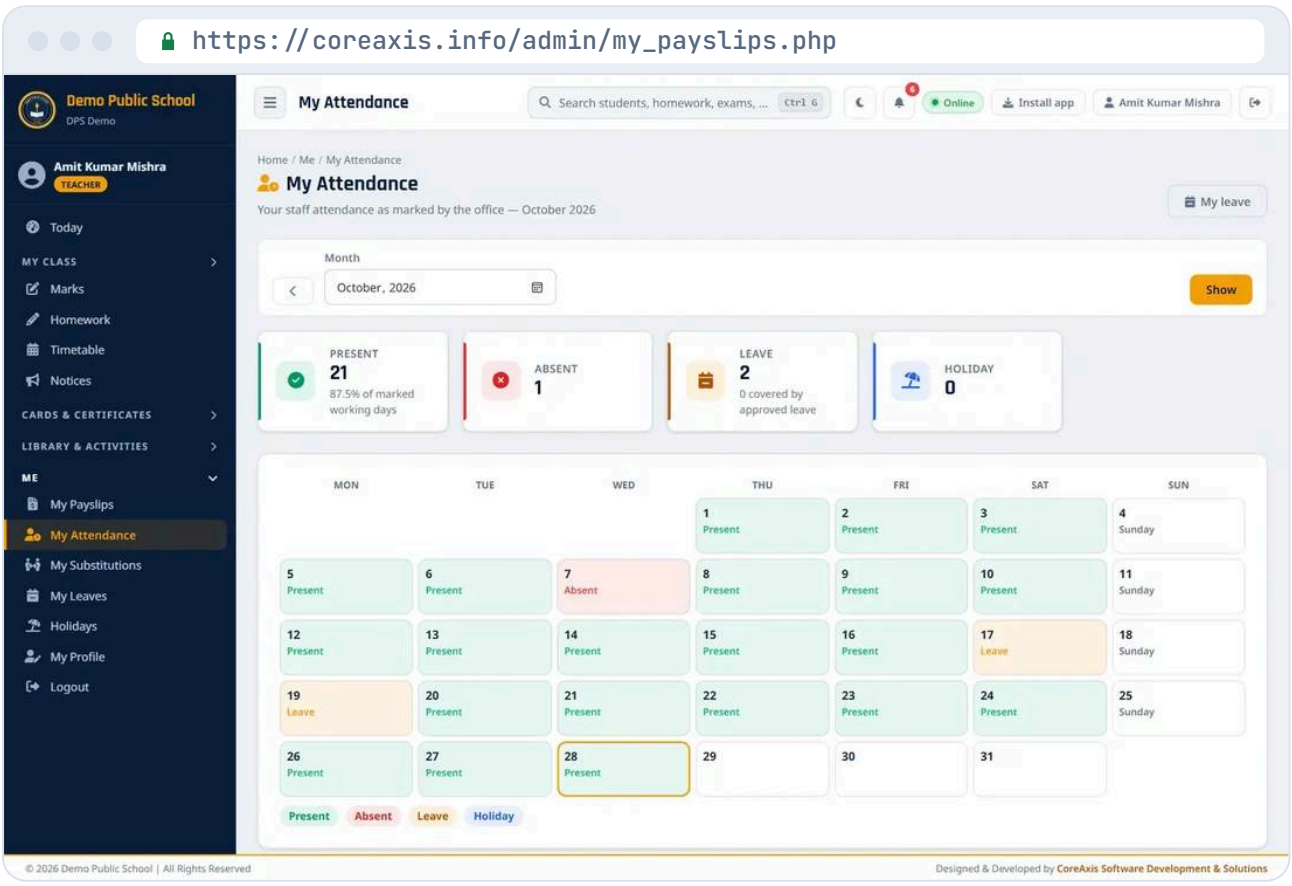
3. Click the eye icon on a month to view the payslip PDF in the browser.

4. Click the download icon to save the PDF. It is the same payslip as in the mobile app.

TIP A month appears here after the office generates salary for it in Salary / Payroll. Ask the accountant if a month is missing.

My Attendance: your month at a glance

1. Open **Me › My Attendance**. The current month opens (October 2026).



21 present, 1 absent, 2 leave; Sundays shown.

2. Read the cards **Present** (with % of marked working days), **Absent**, **Leave** (and how many are covered by approved leave) and **Holiday**.

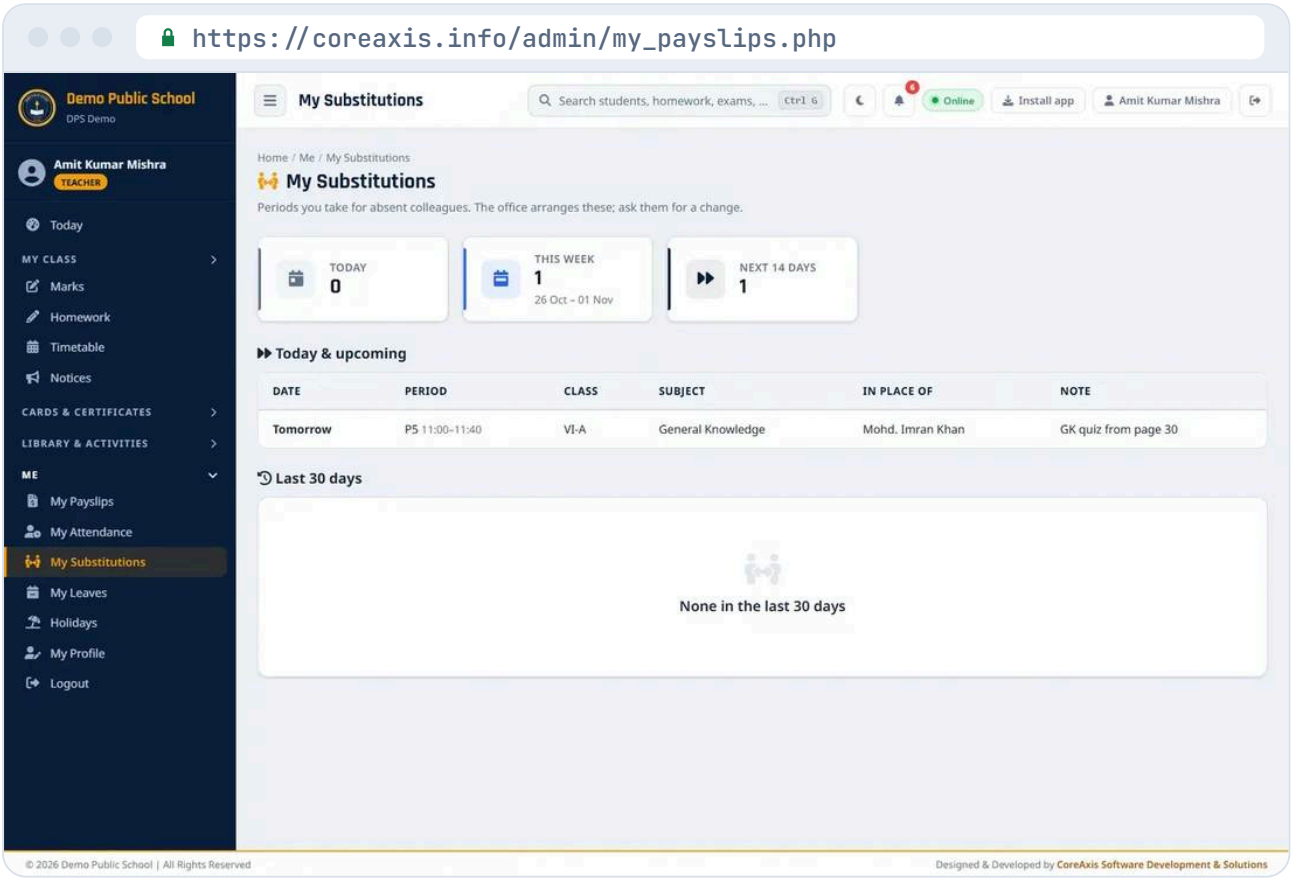
3. Each day in the calendar shows Present, Absent, Leave, Holiday or Sunday. Use the arrow or the **Month** box and **Show** to see another month.

4. At the bottom, **My leave balance** shows CL, EL and HPL available; click **Open My Leave** to apply.

TIP If a day is wrong (for example Absent on a day you were present), tell the office; only they can change staff attendance.

My Substitutions

1. Open **Me › My Substitutions** (teachers). It lists periods you must take for absent colleagues: **Today**, **This week** and **Next 14 days**, then **Today & upcoming** and **Last 30 days**.

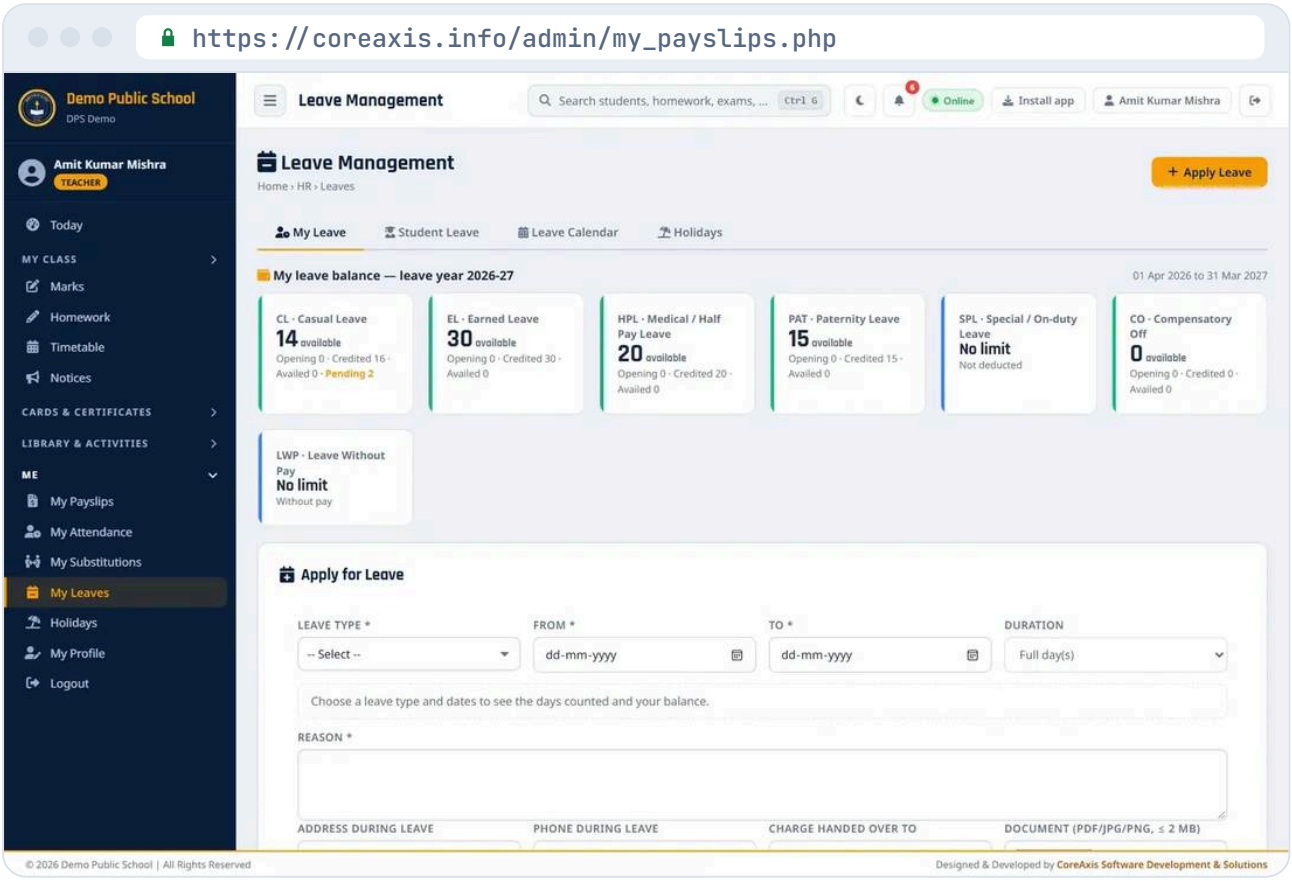


No substitutions assigned this week.

2. The office arranges substitutions; ask them for a change.

My Leave

1. Open **Me › My Leaves** (teachers and accountants) or **Me › My Leave** (admin-level). Your balance for each leave type is at the top; **Pending 2** under CL means 2 days are waiting for approval.

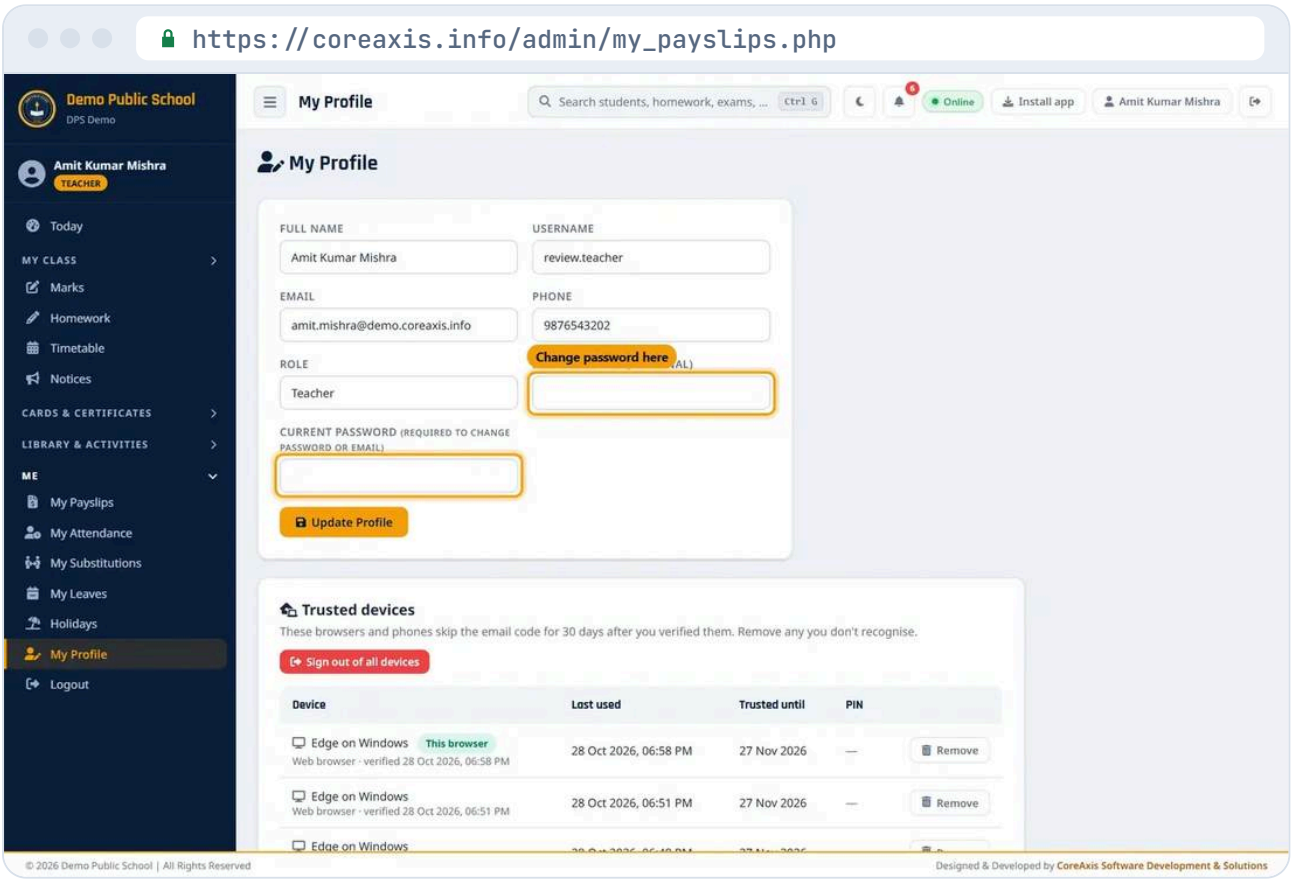


Leave balance and the Apply for Leave form.

2. Fill **Apply for Leave** and click **Submit Application**. The full steps are in the Leave Management chapter.

My Profile: details and password

1. Open **Me › My Profile**. You can correct **Full Name**, **Email** and **Phone**. **Username** and **Role** are set by the office.



My Profile with the two password boxes.

2. To change your password, type the new one in **New Password (optional)** (••••••••; at least 8 characters with an uppercase letter, a lowercase letter and a number).

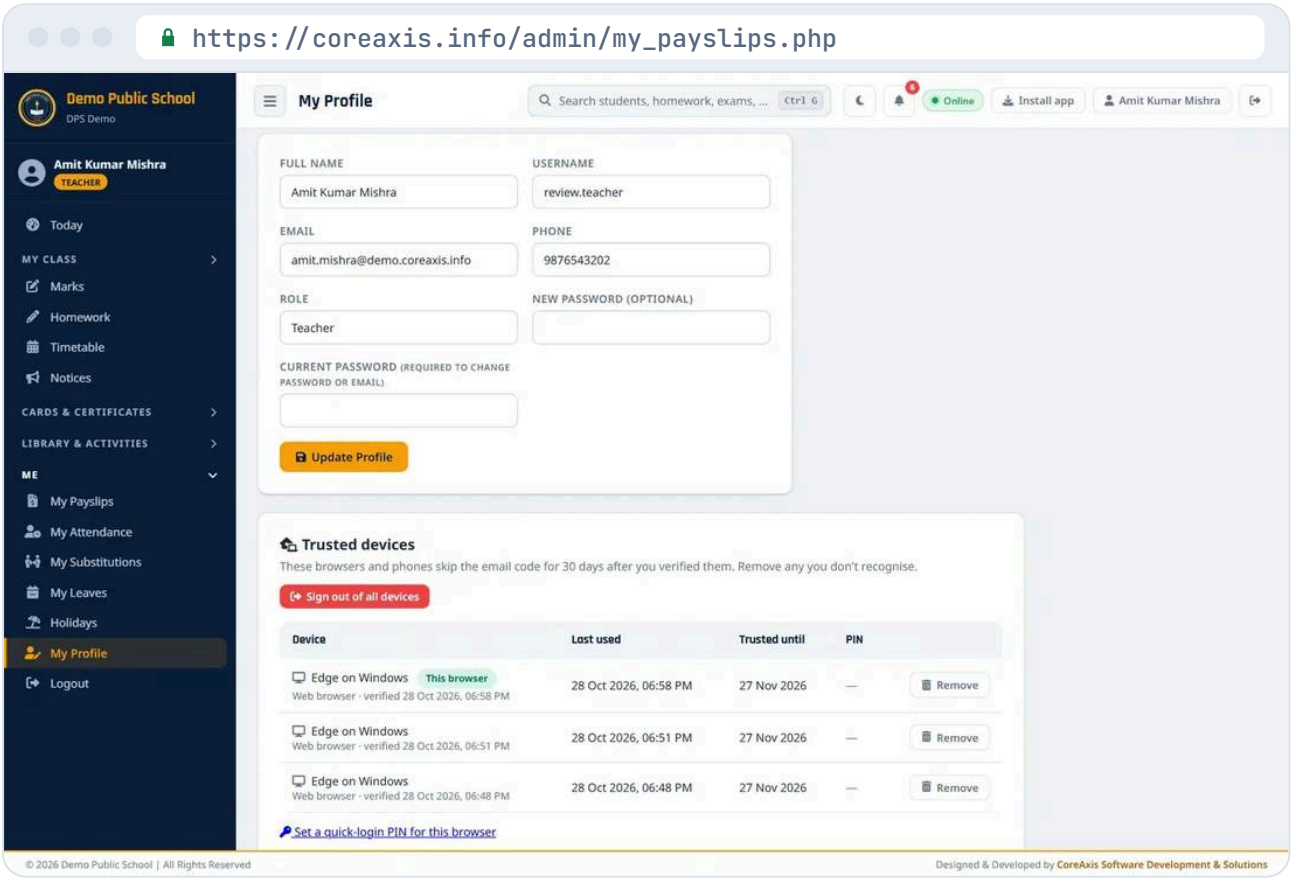
3. Type your present password in **Current Password**. It is needed to change the password or the email.

4. Click **Update Profile**. Other devices are signed out after a password change; sign in again there with the new password.

IMPORTANT Never share your password. The office can reset it, but they cannot see it.

Trusted devices and quick-login PIN

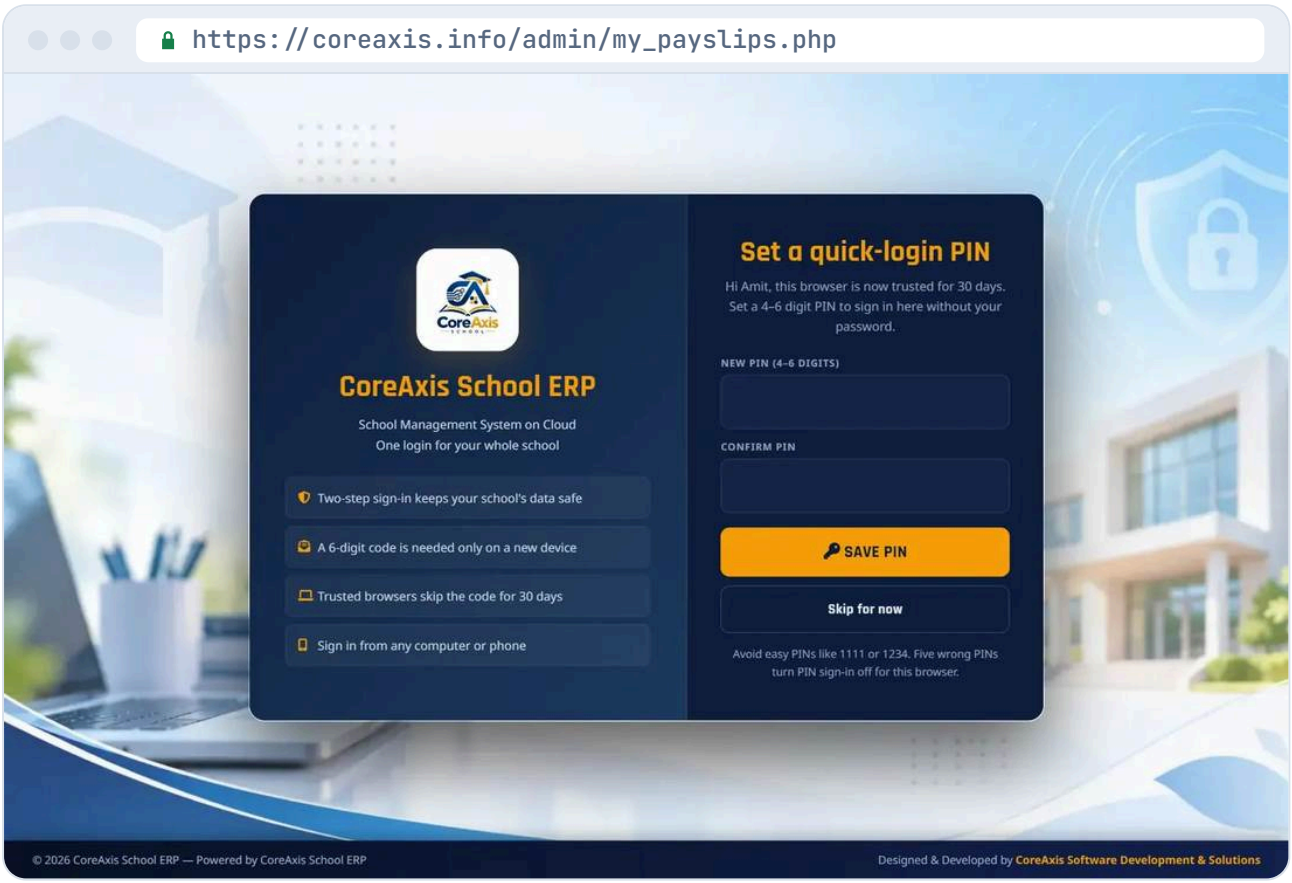
1. On **My Profile**, scroll to **Trusted devices**. Browsers and phones you verified with the email code skip the code for 30 days. Each row shows the device, last used, trusted-until date and whether a PIN is set.



Trusted devices list.

2. Click **Remove** on any device you do not recognise. Click **Sign out of all devices** if you think someone else has your password.

3 Click **Set a quick-login PIN for this browser** to choose a 4–6 digit PIN. On this trusted browser you can then sign in with the PIN instead of the password.



Set a quick-login PIN: type it twice and click Save PIN.

4 Type the **New PIN** and **Confirm PIN** and click **Save PIN**, or click **Skip for now**.

TIP Avoid easy PINs like 1111 or 1234. Five wrong PINs turn PIN sign-in off for that browser.

Questions

I forgot my password.

Click **Forgot Password?** on the sign-in page, or ask the office (Admin) to reset it from Staff › Staff › Reset Password.

I changed my phone. Do I need a new code?

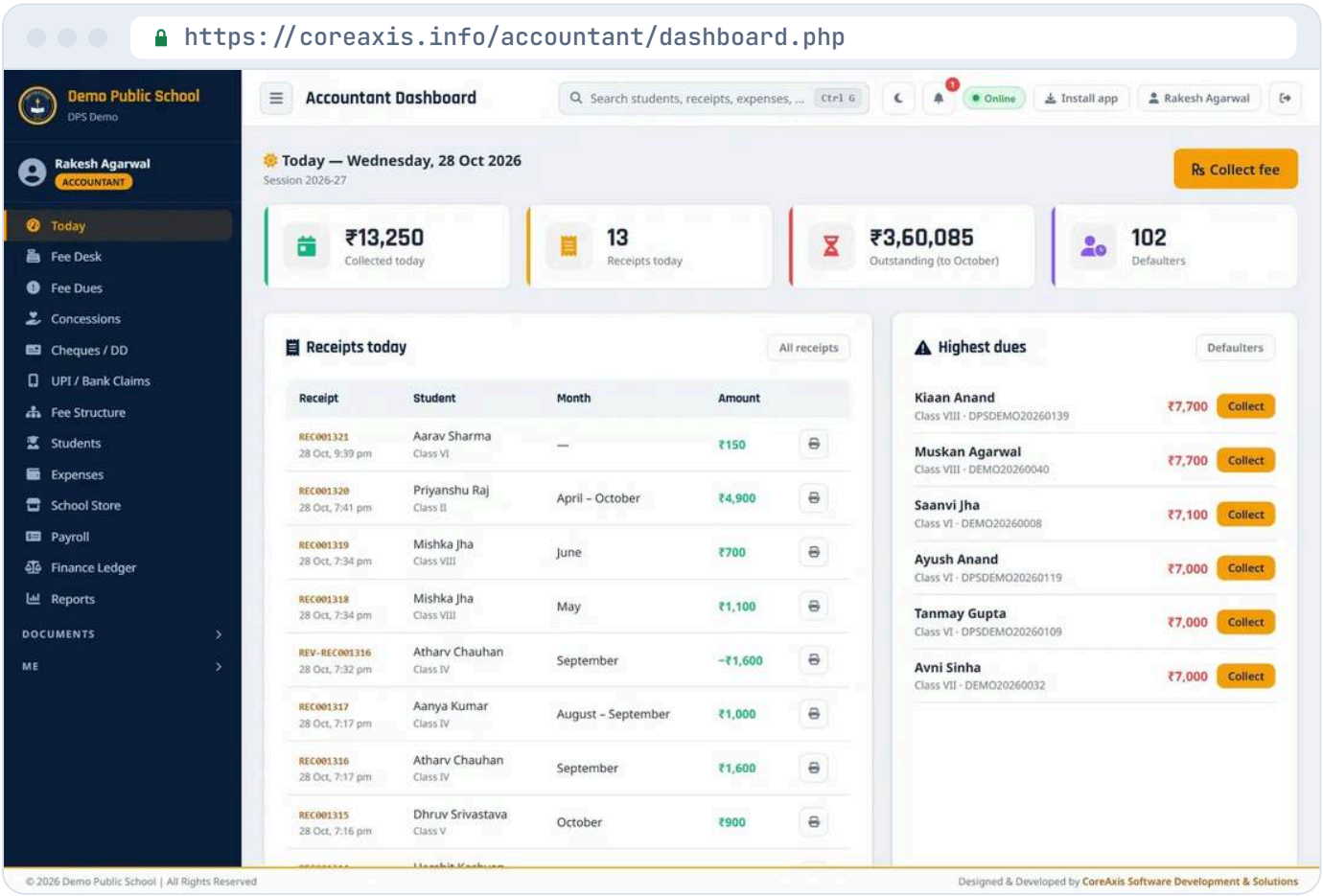
Yes. A new device asks for the 6-digit email code once, then it is trusted for 30 days.

ROLE GUIDES · CHAPTER 54

Accountant

Accountant MENU Today (the accountant's home page)

This guide follows Rakesh Agarwal, the accountant of Demo Public School, through a normal working day. It shows what each card on his Today page means, what his menu contains, and in which order he uses the finance screens. Each step points to the module chapter that explains the screen in full (Fee Desk, Cheques / DD, UPI / Bank Claims, Expenses, Finance Ledger, Payroll, Reports).

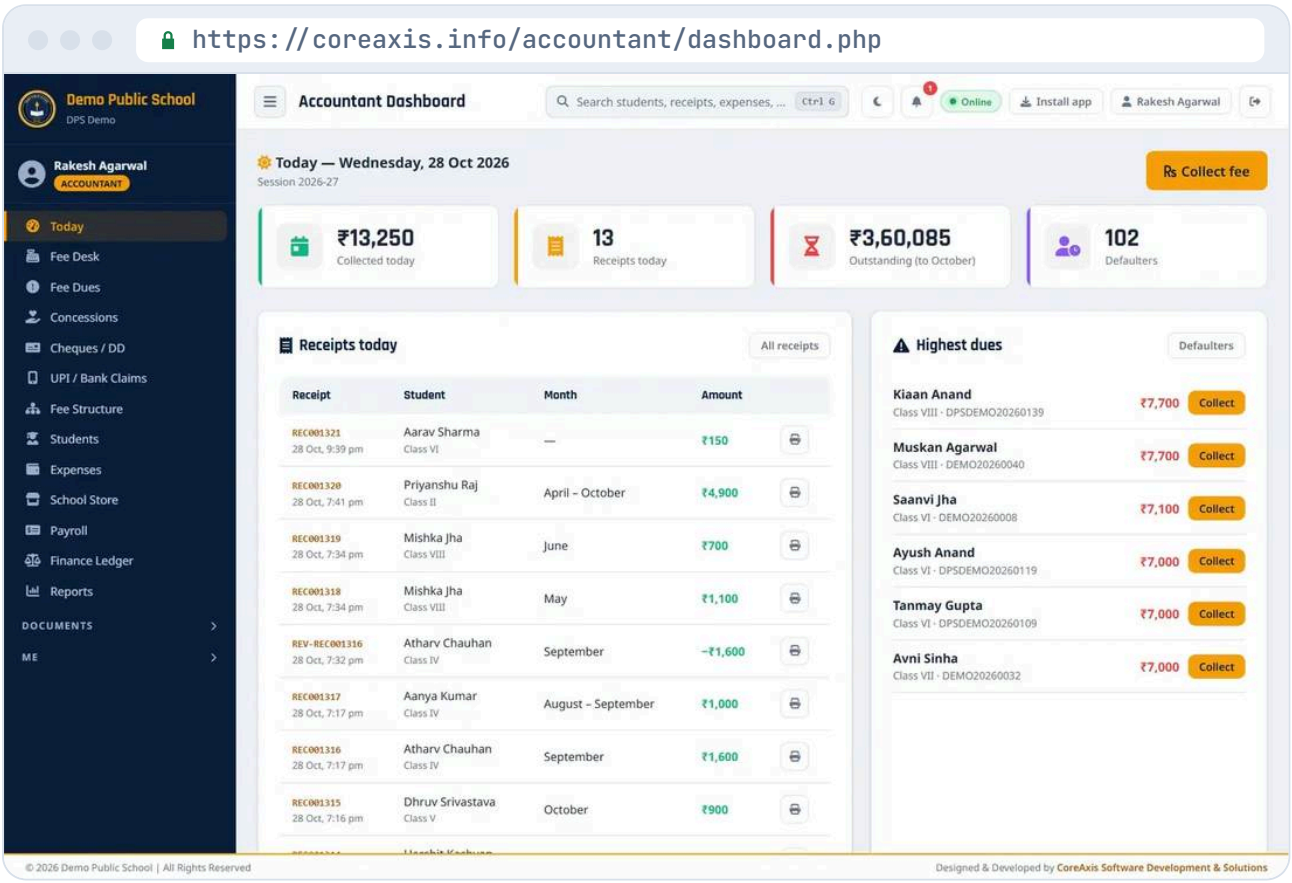


Accountant — Demo Public School

The Today page at a glance

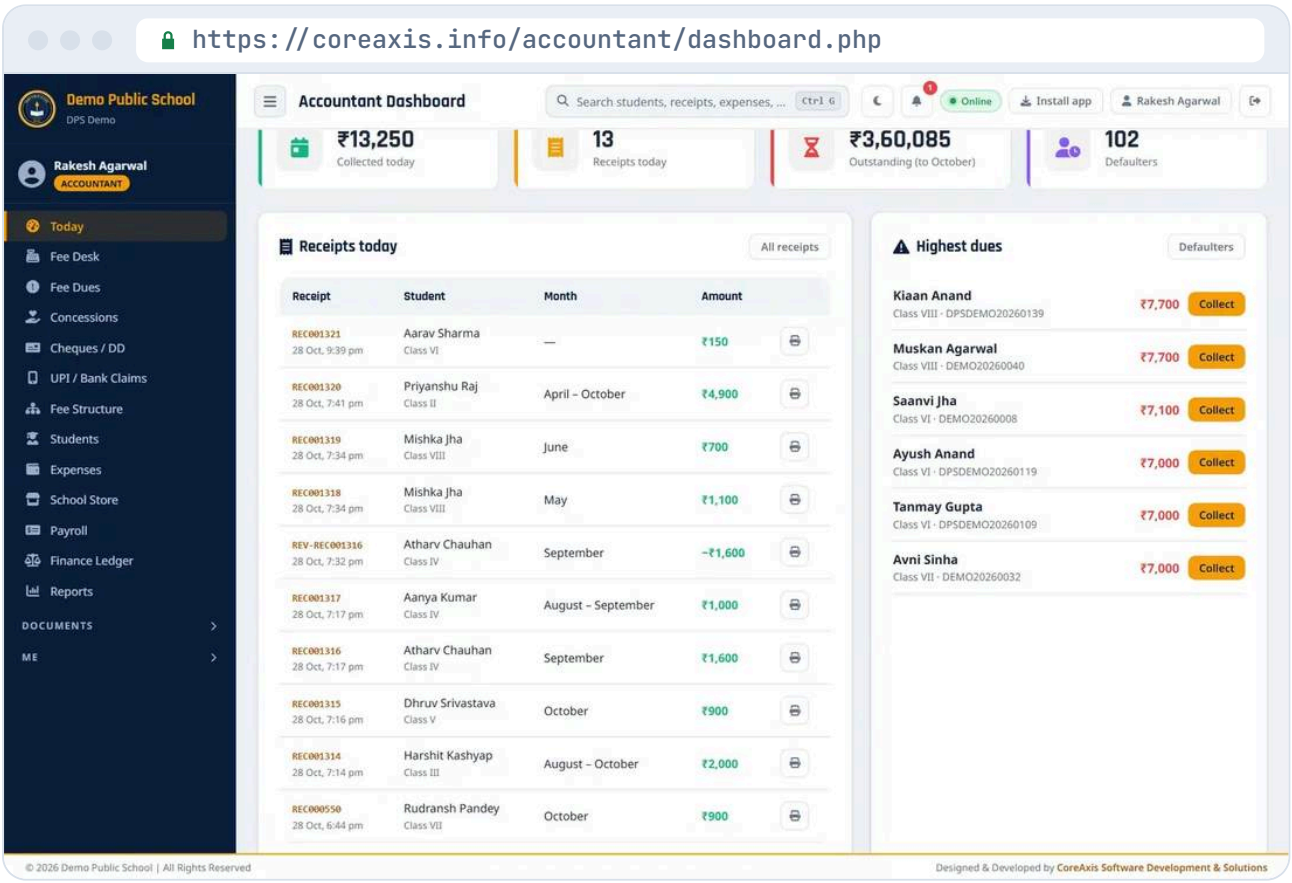
The accountant lands on Today after signing in. Everything on it is for the current session (2026-27) and today's date. Click any card to open the screen behind it.

1 Read the cards across the top first. They answer: how much came in today, and what is still pending.



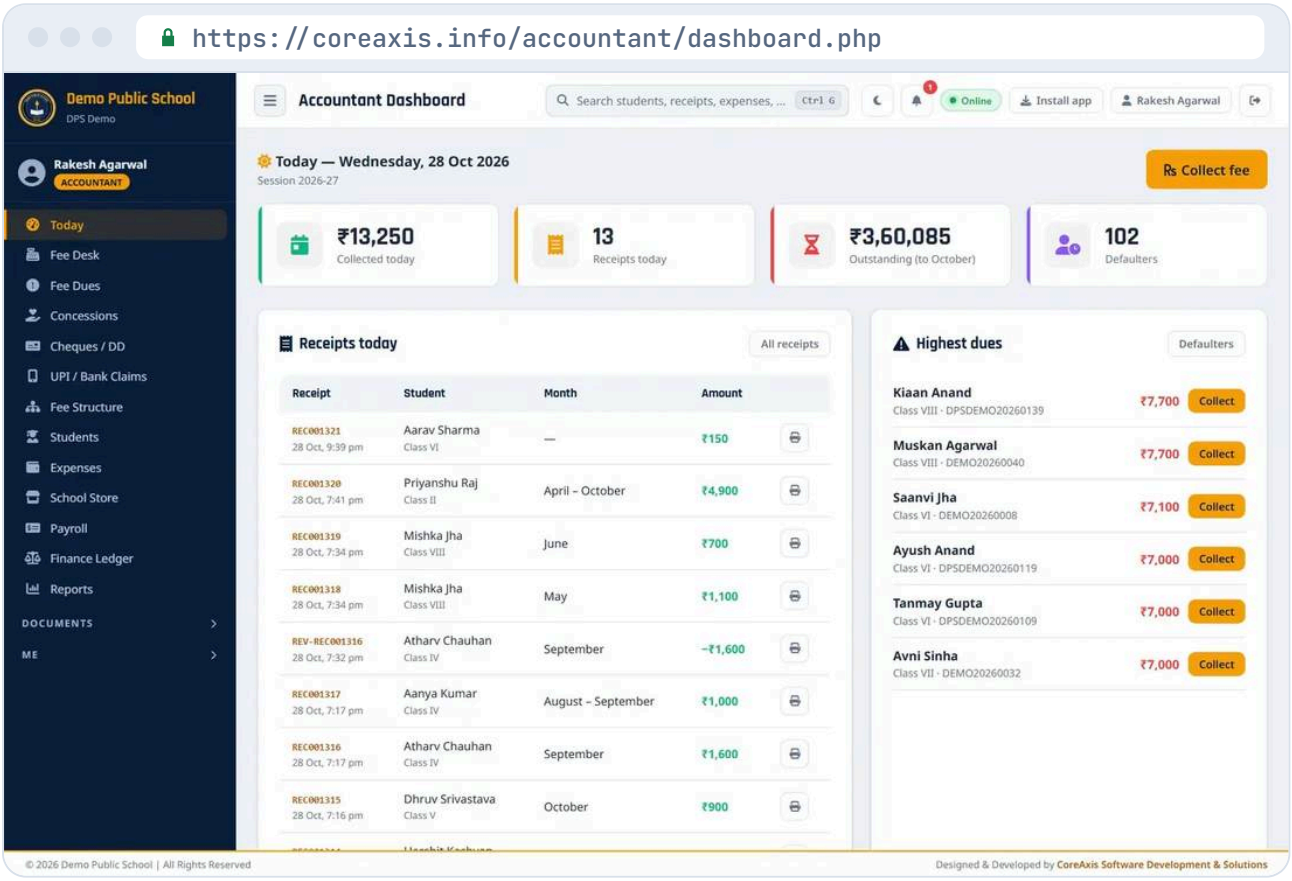
Rakesh Agarwal's Today page on 28 Oct 2026: ₹13,250 collected in 13 receipts, ₹3,60,085 outstanding, 102 defaulters.

2 Read **Receipts today**. A receipt that covers several months shows the range in **Month**, for example **August – October** for Harshit Kashyap's ₹2,000.



Receipts today: REC001314 covers August – October; a reversed cheque shows in red as −₹1,600.

3 Scroll down to **Finance summary** for the month and the session totals.



Finance summary: fees this month ₹3,63,300, expenses + salary ₹2,47,110, fees this session ₹10,07,050, session net −₹4,70,090.

Collect fee (button, top right)	Opens the Fee Desk with the cursor in the student search. The fastest way to start a receipt.
Collected today	Total of all fee receipts made today, in every mode (Cash, UPI / online, Cheque). Opens the Fee Desk.
Receipts today	Number of receipts made today by anyone in the office. Opens the Fee Desk.
Outstanding (to October)	Fees billed up to the current month and not yet paid, for all active students. Opens Fee Dues.
Defaulters	Number of students with any amount due up to the current month. Opens Fee Dues.
Cheques / DD pending clearance	Shown when cheques are waiting: count and amount of cheque / DD receipts the bank has not yet cleared (for example 2 · ₹4,000). Opens Cheques / DD.

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Receipts today (panel)	Today's receipts, newest first: receipt number and time, student and class, month paid (or the range, such as August – October, when one payment covers several months), amount. The printer icon reprints the receipt. **All receipts** opens the Fee Desk list.
Highest dues (panel)	The six students with the largest dues, with admission number and amount. **Collect** opens the Fee Desk with that student already loaded. **Defaulters** opens Fee Dues.
Finance summary (panel)	Fees this month; Expenses + salary this month; Fees this session (2026-27); Session net (after expenses + salary). A minus session net (for example −₹4,70,090) means more has been spent than collected so far this session. **Reports** opens Reports & Analytics.
Top bar	Search (Ctrl + G) finds students, receipts and expenses from any page. The bell shows notifications. Online shows the connection. Install app adds CoreAxis to the computer or phone. Your name opens My Profile; the last icon signs you out.

The accountant's menu

The accountant sees only finance and document screens. Academic and staff-management screens are not in this menu.

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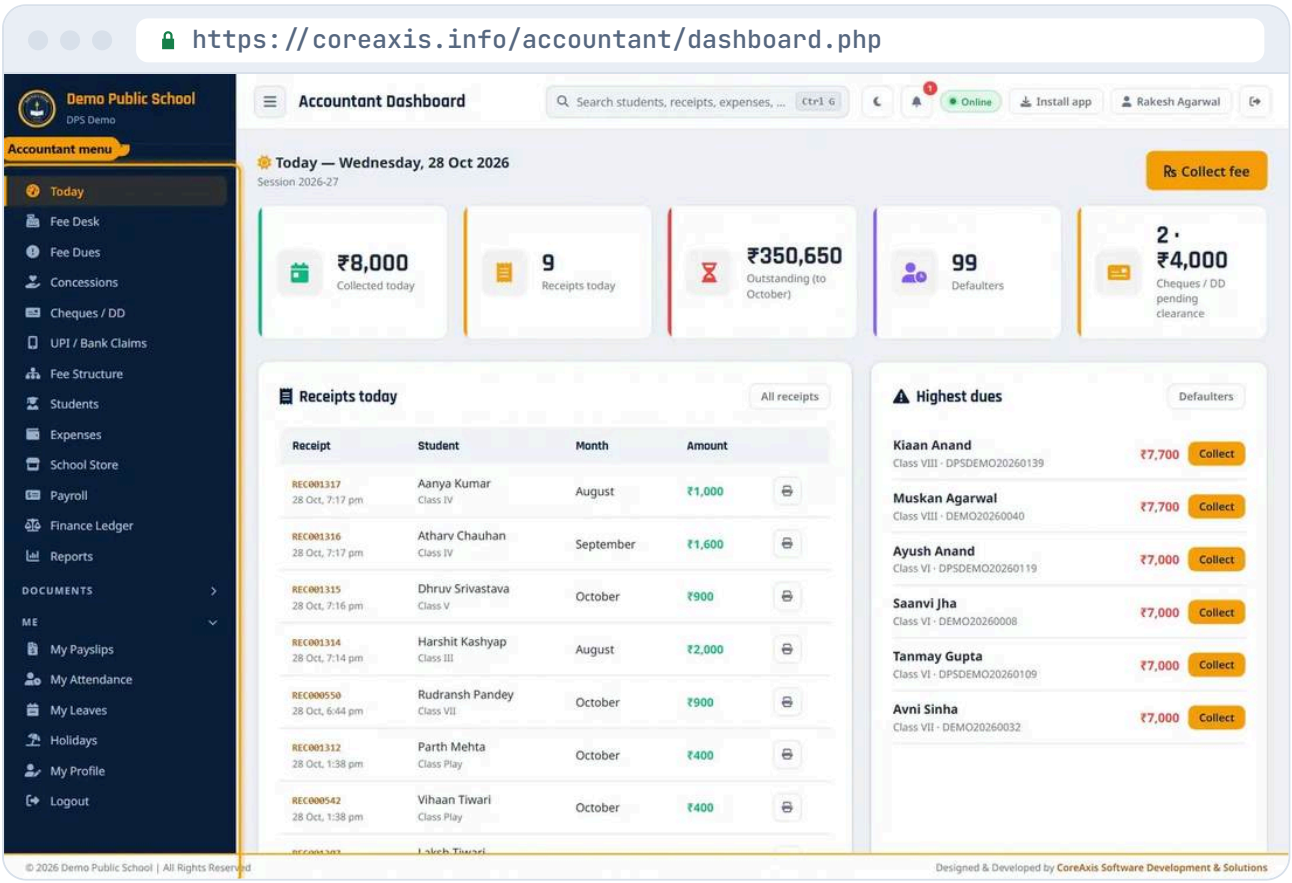
1 Open **Documents** and **Me** in the left menu to see the grouped items. The menu remembers which groups you opened.



The full accountant menu with the Me group open.

Today	This home page.
Fee Desk	Collect fees and print receipts. See the Fee Desk chapter.
Fee Dues	Who owes what, month-wise; reminders. See the Fee Dues chapter.
Concessions	Scholarships, staff-ward and sibling concessions. Accountants can add a concession; only Admin / Principal approve it. See the Concessions chapter.
Cheques / DD	Mark cheques Cleared or Bounced. See the Cheques / DD chapter.
UPI / Bank Claims	Payments parents made straight to the school's UPI ID or bank account and reported from the portal. See the UPI / Bank Claims chapter.

Fee Structure	Class-wise fee heads and amounts (view; changes are made by Admin / Principal).
Students	Student list with quick links to collect fee and view dues.
Expenses	Record bills and payments made by the school. See the Expenses chapter.
School Store	Sell uniforms, books and other store items (shown only when the school has the Store add-on).
Payroll	Monthly salary of all staff. See the Payroll chapter.
Finance Ledger	Overview, Cash Book, Bank Book, Ledger and Income & Expenditure. See the Finance Ledger chapter.
Reports	Collection charts and class-wise totals. See the Reports chapter.
Documents › TC / Certificates, Document Register	The accountant checks fee clearance before a TC is issued and can see every document issued.
Me › My Payslips, My Attendance, My Leaves, Holidays, My Profile	The accountant's own salary slips, attendance, leave applications, the holiday list and profile. See the My Account chapter.

Morning: collect fees at the counter (example: Kiaan Anand, Class VIII, dues ₹7,700)

Most of the morning goes on the counter. Parents come with cash, show a UPI payment, or hand over a cheque.

1. On **Today**, look at **Highest dues**. Kiaan Anand of Class VIII owes ₹7,700.

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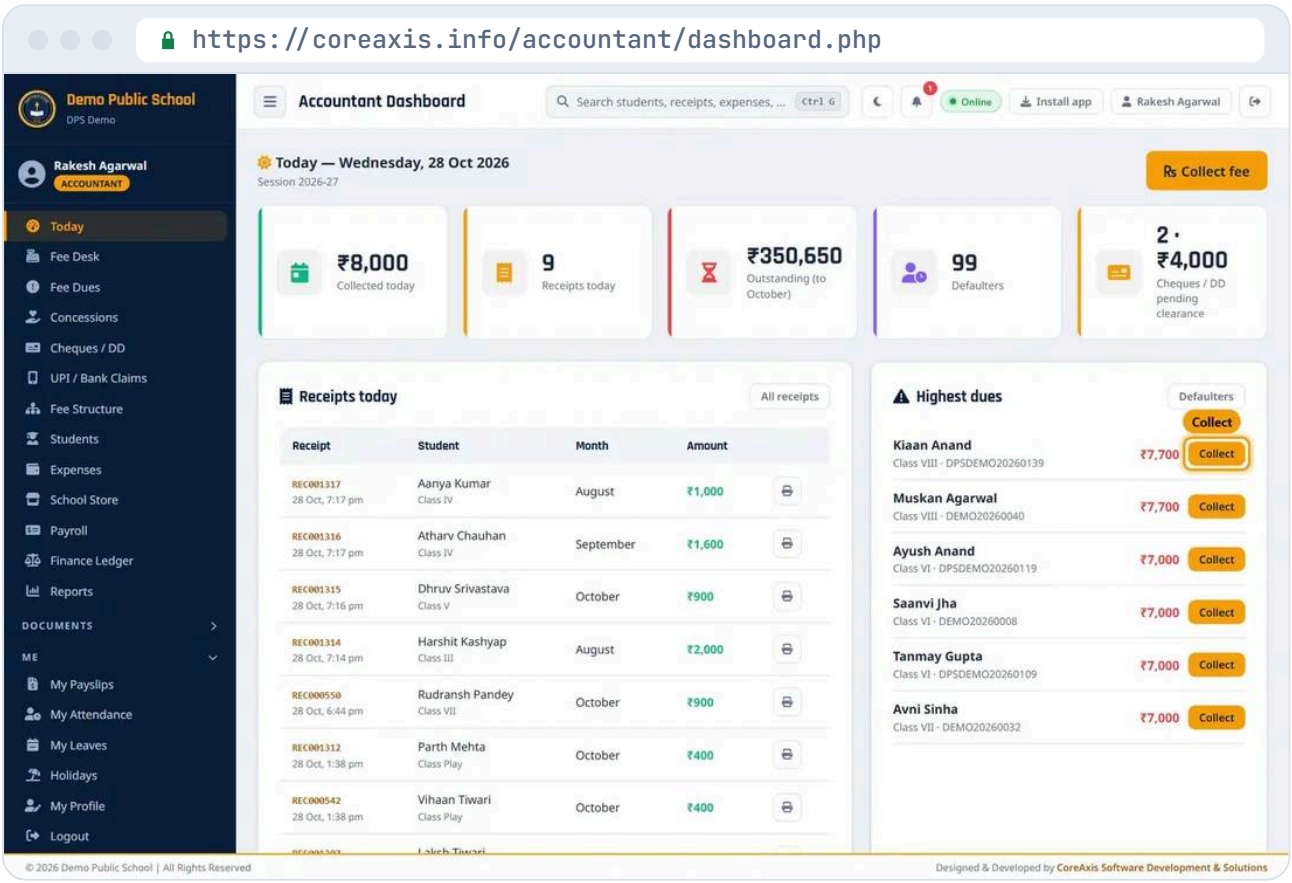
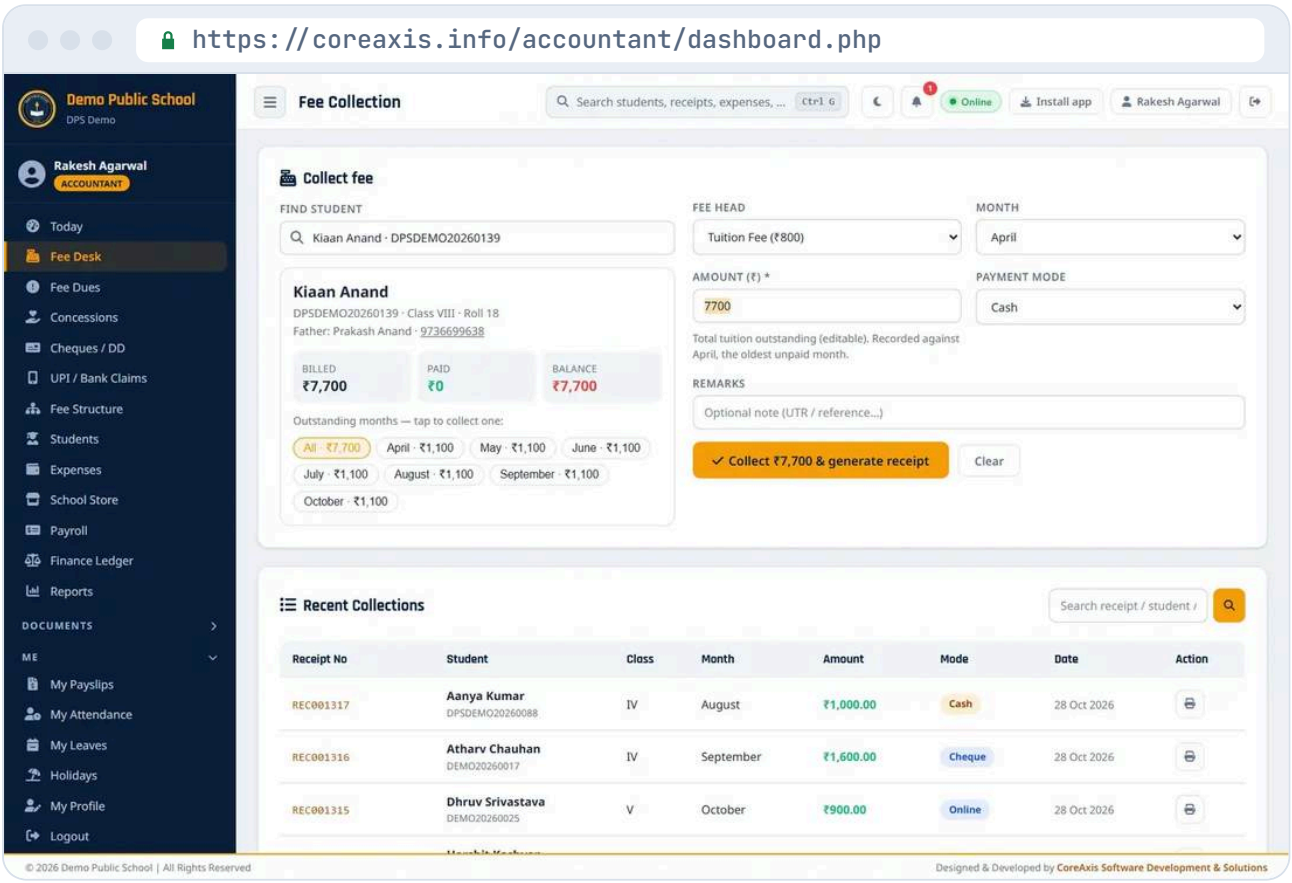
2 Click **Collect** next to his name. (For any other student, click **Collect fee** at the top and search by name or admission number.)



Collect opens the Fee Desk with the student already loaded.

3 On the Fee Desk, check the student card: **Billed**, **Paid**, **Balance** and the outstanding months.



Kiaan Anand on the Fee Desk: ₹7,700 due for April to October.

4 Tap one month chip (for example **April · ₹1,100**) or keep **All**, and check **Amount (₹)**.

5 Choose the **Payment mode** (Cash, UPI / Online, Cheque) and add a note in **Remarks** if needed (UTR or cheque details).

6 Click **Collect ... & generate receipt**, confirm in the popup, and print or share the receipt.

TIP Press Ctrl + G on any page and type a name, admission number or receipt number to jump straight to it.

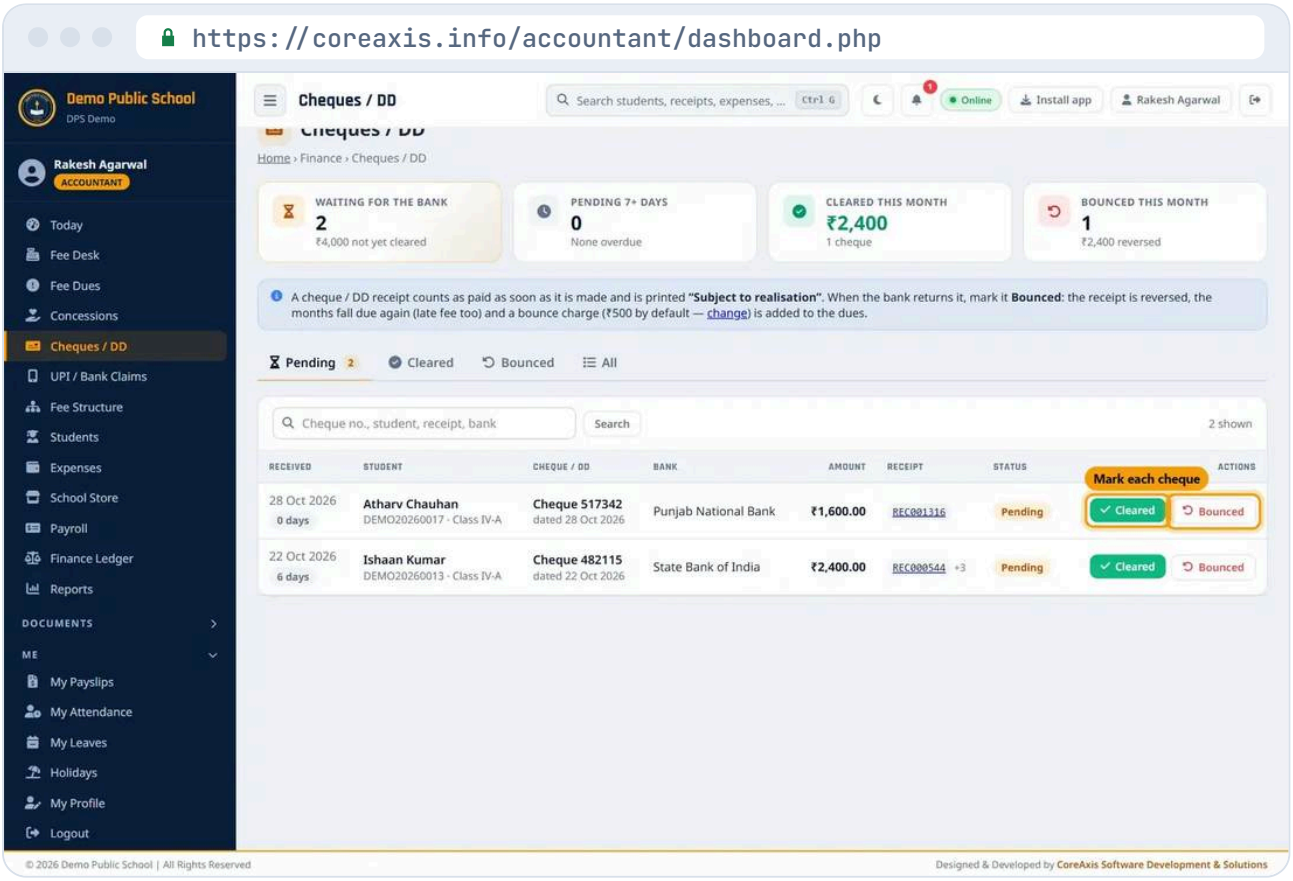
TIP A cheque receipt counts as paid at once and prints "Subject to realisation". It then waits on Cheques / DD until the bank clears it.

Mid-morning: clear the cheques the bank has passed

When the bank statement or passbook shows that a cheque has been credited, mark it Cleared. If the bank returns it, mark it Bounced.

1. Click the **Cheques / DD pending clearance** card on Today, or **Cheques / DD** in the menu.

2. On the **Pending** tab, find the cheque by number (example: Cheque 482115, Ishaan Kumar, State Bank of India, ₹2,400).



Two cheques waiting for the bank. Use Cleared or Bounced on each row.

3. Click **Cleared** when the bank has credited the money, and confirm.

4. Click **Bounced** only when the bank returns the cheque. The receipt is reversed, the months fall due again and a bounce charge is added. See the Cheques / DD chapter before doing this.

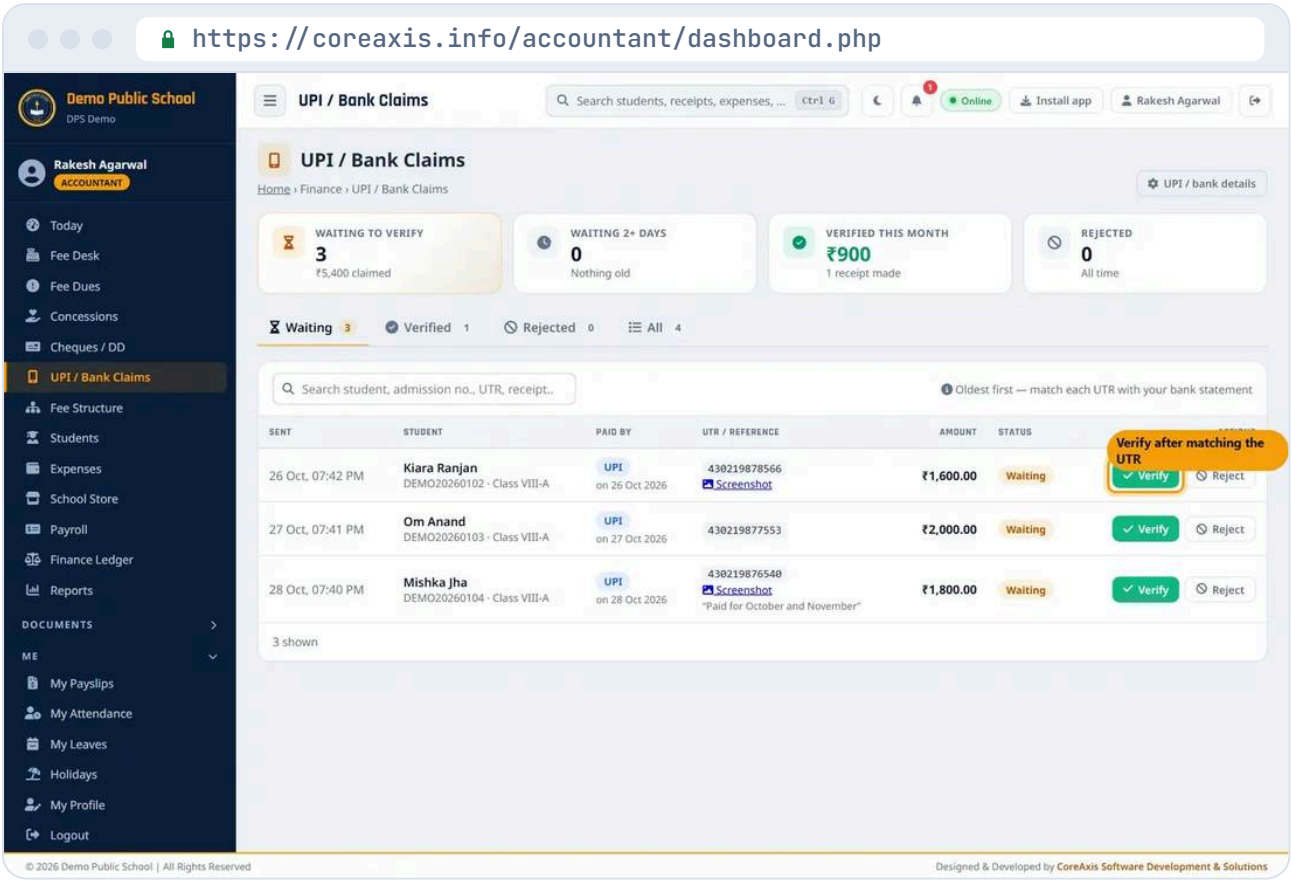
IMPORTANT Bounced reverses the receipt and adds a bounce charge to the student's dues. Check the bank's return memo before you click it.

Late morning: verify UPI / bank-transfer claims from parents

Parents who pay straight to the school's UPI ID (demopublicschool@sbi) or bank account send the UTR number from the portal or the app. No receipt is made until the office checks the money has arrived.

1. Open **UPI / Bank Claims**. The **Waiting** tab lists the oldest claim first.

2 Open the school's bank statement or UPI app and match each **UTR / Reference** and **Amount** (example: Kiara Ranjan, UTR 430219878566, ₹1,600). Click **Screenshot** to see the parent's proof.



Three claims waiting. Verify only after the UTR is found in the bank statement.

3 Click **Verify** when the money is in the account. The receipt is made and the parent sees it in the portal.

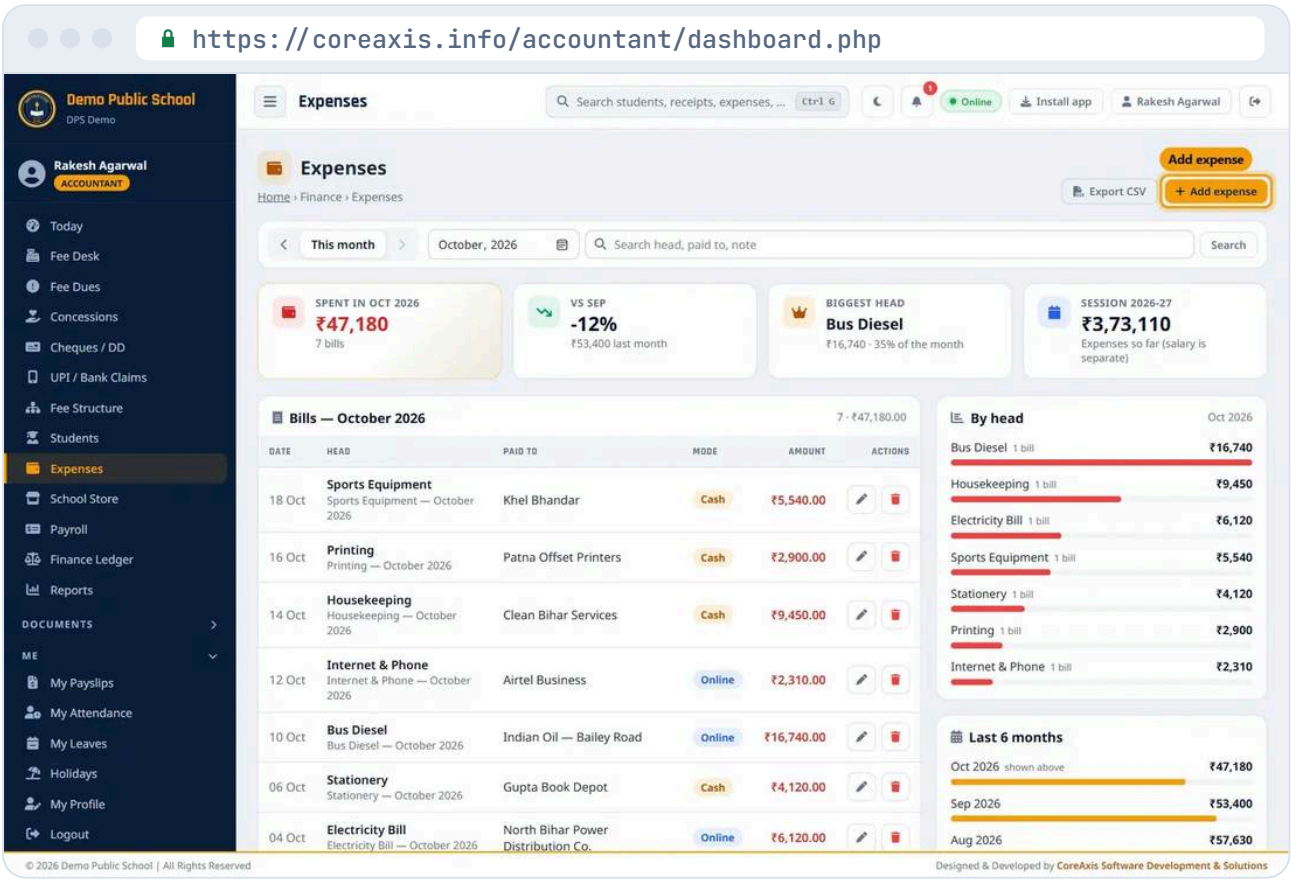
4 Click **Reject** (with a reason) when no matching credit is found. The parent sees the reason.

TIP Claims older than two days show in the **Waiting 2+ days** card. Parents expect a receipt within one or two working days.

Afternoon: record the day's expenses (example:

a stationery bill from Gupta Book Depot)

1. Open **Expenses**. The cards show this month's spending, the change against last month and the biggest head.



Expenses for October 2026. Add expense is at the top right.

2. Click **Add expense** and fill **Expense head** (Stationery), **Amount (₹)** (₹1,850), **Date**, **Paid to** (Gupta Book Depot), **Payment mode** (Cash) and a short **Description** ("Registers and chalk for October").

3. Save and confirm. Cash expenses reduce the Cash Book; online and cheque payments reduce the Bank Book.

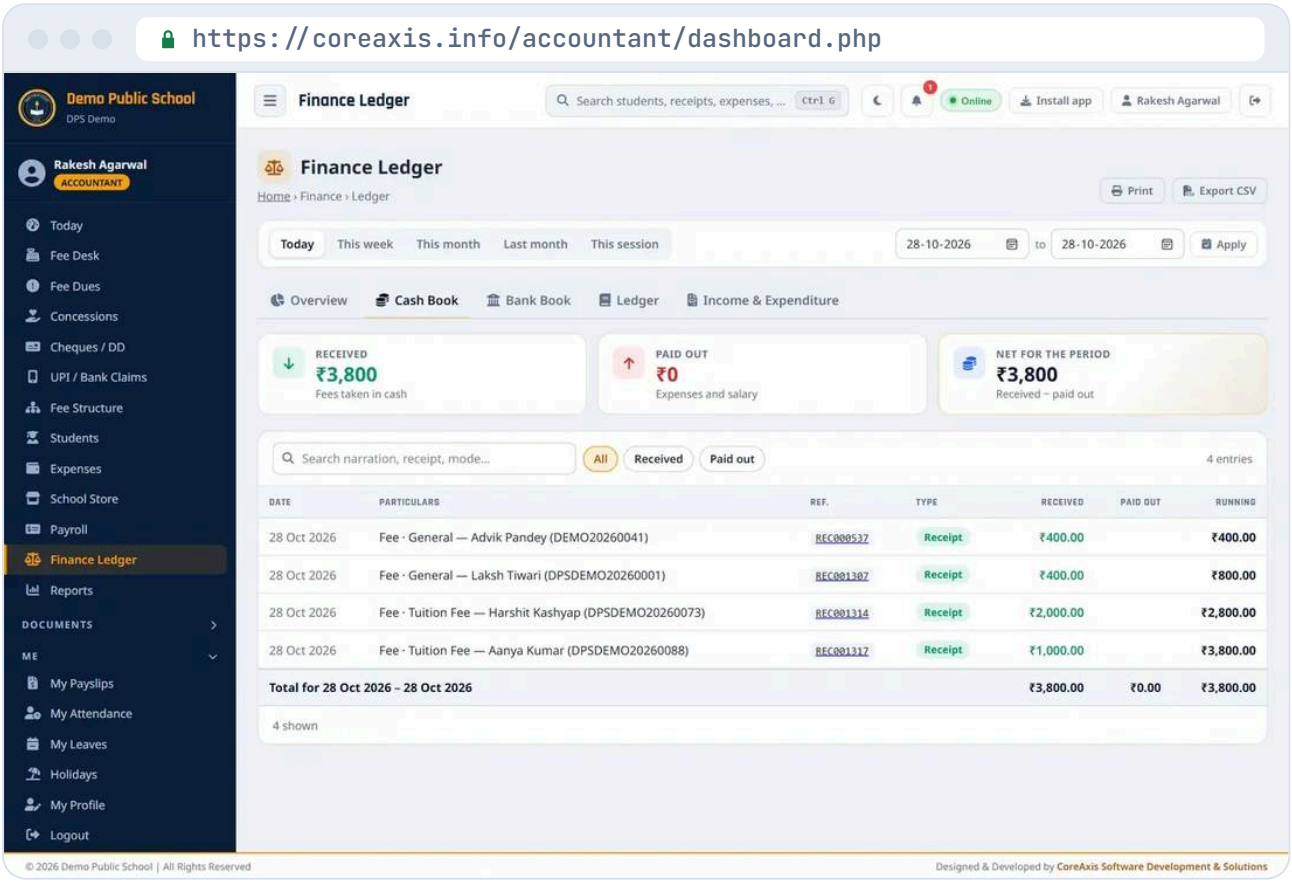
Day end: check the cash in hand against the Cash Book

Before closing the counter, count the cash and compare it with what the system says was received in cash today.

1. Open **Finance Ledger**.

2. Click **Today** in the period bar, then the **Cash Book** tab.

3. Read **Received** (fees taken in cash), **Paid out** (cash expenses and salary) and **Net for the period**. On 28 Oct 2026 cash received was ₹3,800 from four receipts, with nothing paid out.



Cash Book for today: four cash receipts, running balance ₹3,800.

4. Count the cash in the drawer. It should equal the opening cash plus **Net for the period**.

5. If it does not match, look down the list for a receipt marked Cash that was actually paid by UPI, or a cash expense that was not entered.

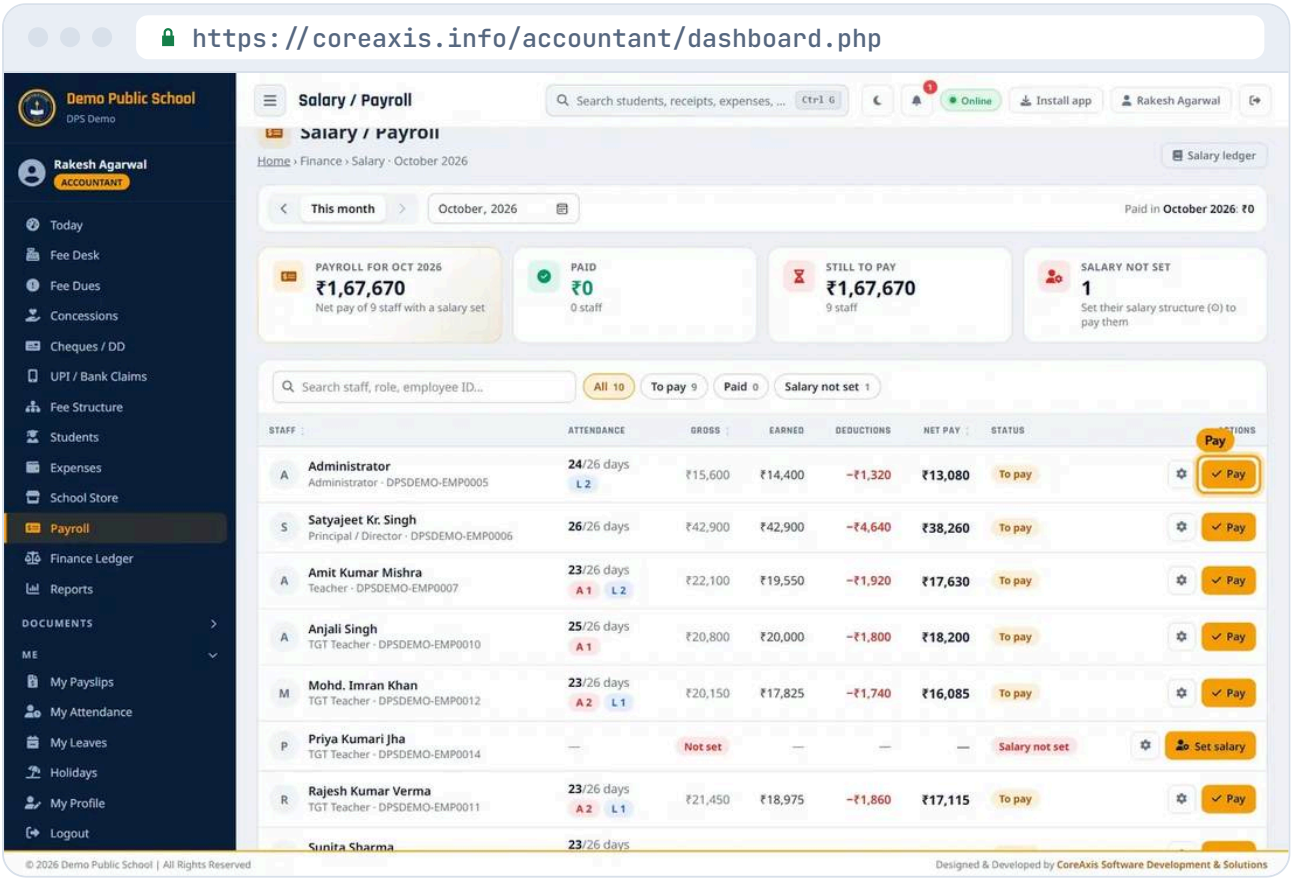
6. Click **Print** to keep a signed copy of the day's Cash Book with the cash.

> **TIP** UPI and cheque receipts are not in the Cash Book; they are in the Bank Book tab. The Collected today card is the total of all modes.

Month end: pay salaries (example: October 2026 payroll)

After the last working day of the month, the accountant pays each staff member from Payroll. Payroll uses the month's staff attendance and approved leave.

1. Open **Payroll**. The month selector shows **This month** (October 2026).



October 2026 payroll: ₹1,67,670 to pay for 9 staff; 1 staff member has no salary set.

2. Check the **Attendance** column for each person (for example Amit Kumar Mishra: 23/26 days, A 1, L 2).

3. If a row says **Salary not set**, click **Set salary** first (Priya Kumari Jha in the example).

4. Click **Pay** on a row, check the net amount and mode, and confirm. The status changes to Paid and a payslip is made.

5. Repeat for each staff member, then open **Salary ledger** to check the month's total.

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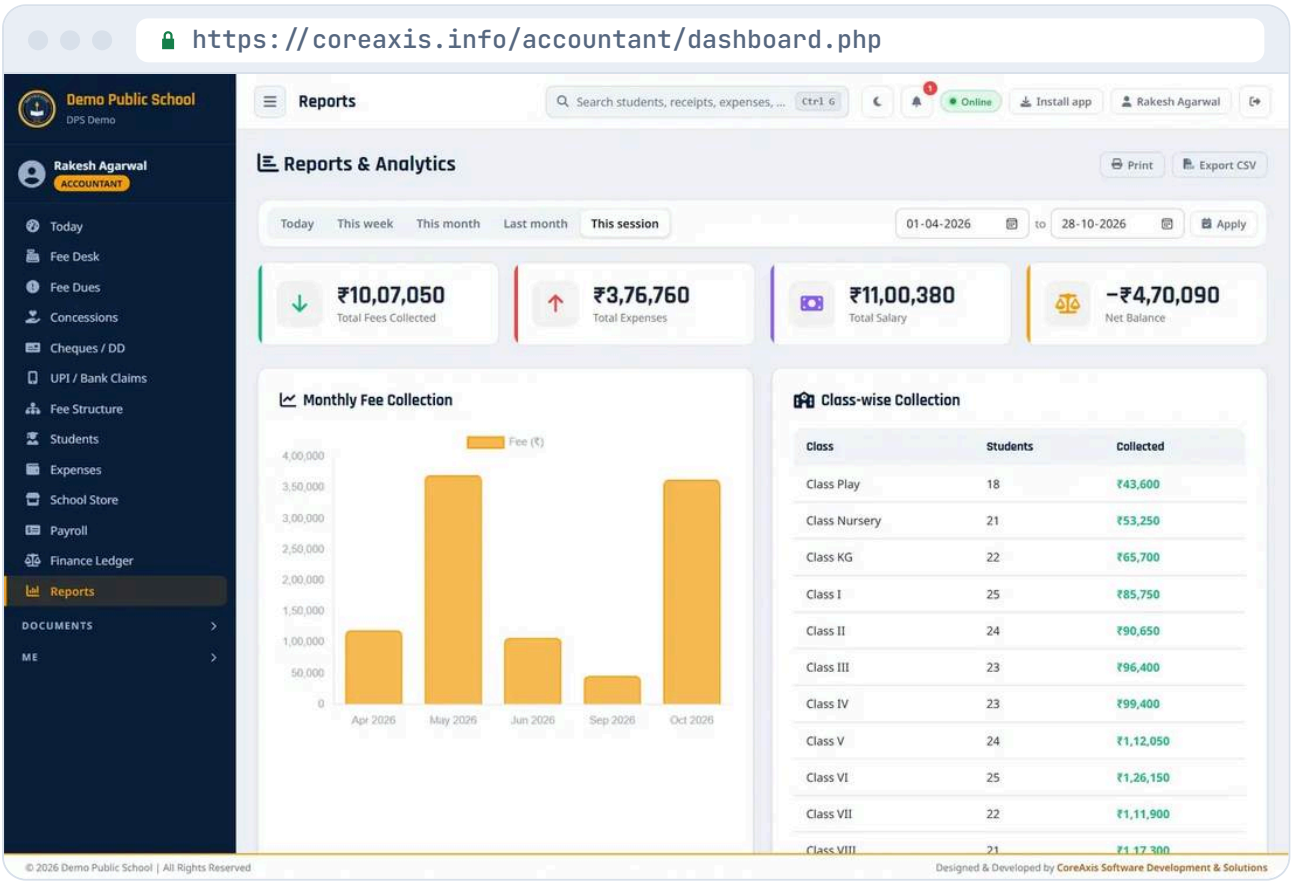
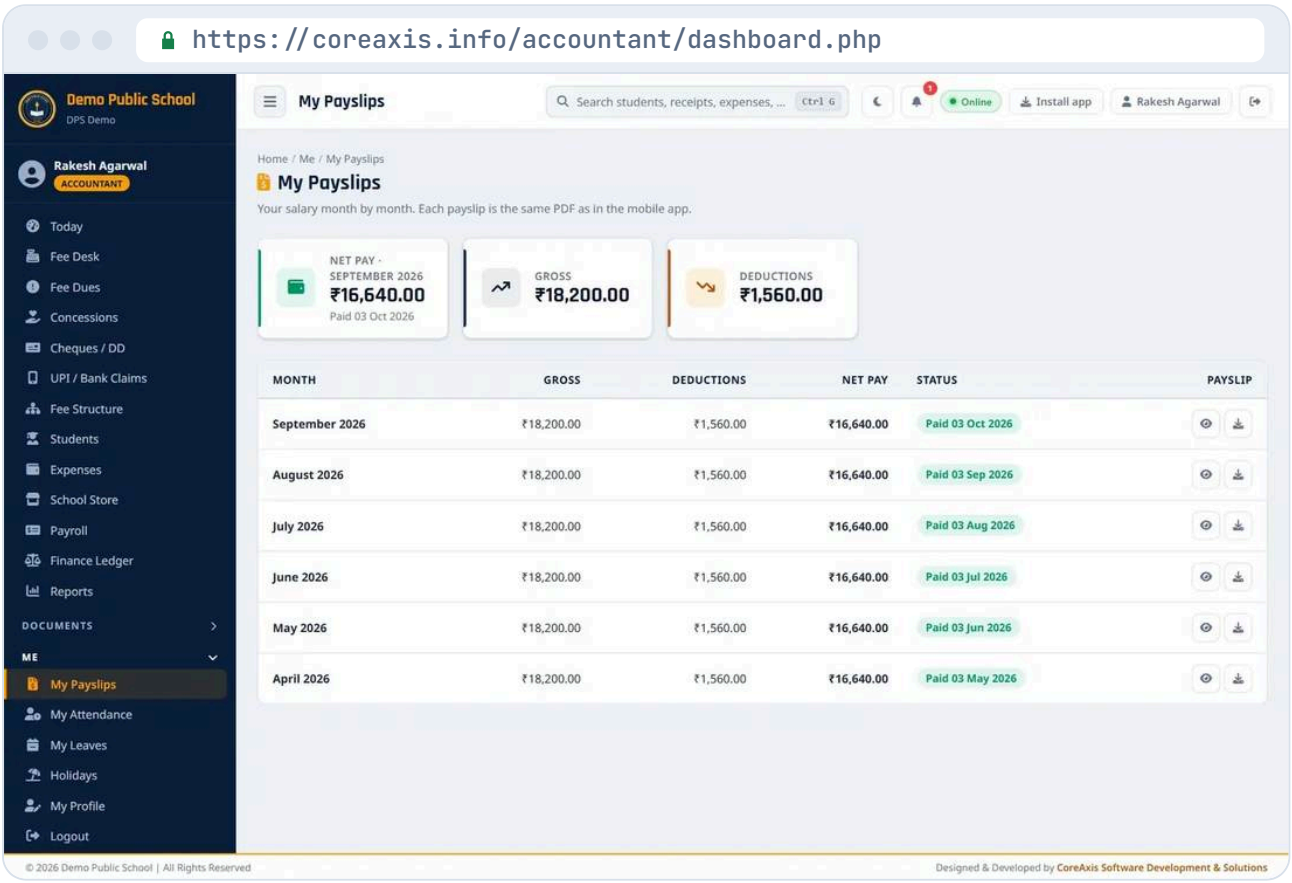
Reports and your own pages

1 Open **Reports** for total fees, expenses, salary and the net balance, the monthly collection chart and class-wise collection. It opens on the session; pick another period (for example **Last month**) and click **Export CSV** for an Excel file, or **Print** for a copy.



Reports & Analytics for the 2026-27 session.

2 Open **Me › My Payslips** to view or download your own payslip for any month. The newest month is at the top.



Rakesh Agarwal's payslips, newest first (September, August, July …), each with a view and a download button.

Daily checklist

Start of day	Today page: note Outstanding, Defaulters and Cheques pending.
Counter	Fee Desk: one receipt per payment; print or share every receipt.
After the bank update	Cheques / DD: mark Cleared (or Bounced).
Twice a day	UPI / Bank Claims: verify or reject each waiting claim.
As bills arrive	Expenses: add each bill the same day.
Closing	Finance Ledger › Today › Cash Book: match cash in hand, print.
Month end	Payroll: pay all staff; Fee Dues: send reminders to defaulters.

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Questions

Collected today and the Cash Book show different amounts. Which is right?

Both. Collected today counts every mode (cash, UPI / online, cheque). The Cash Book shows only cash. Online and cheque money is in the Bank Book.

Can the accountant approve a concession?

No. The accountant can enter a concession request; the Principal or Administrator approves it on Concessions › Approvals.

A parent says they paid by UPI but there is no claim.

Ask them to send the UTR from the portal (Fees › Pay by UPI / bank transfer › I have paid — next). Or, if you can see the credit in the bank, collect it on the Fee Desk with mode UPI and the UTR in Remarks.

The session net on Today is negative. Is something wrong?

Not necessarily. It is fees collected this session minus expenses and salary paid this session. Early in the session, or after large purchases, it can be below zero.

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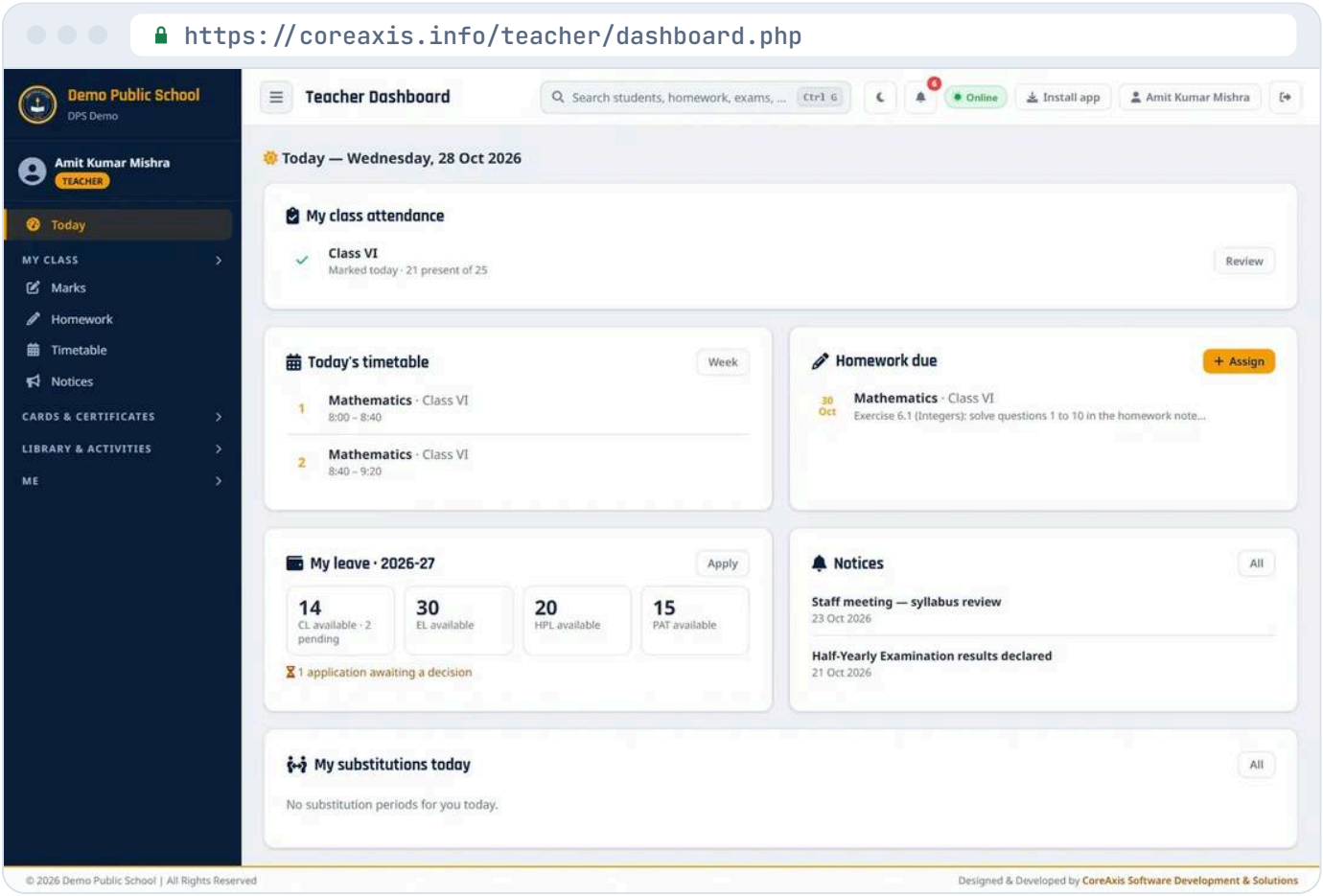
ROLE GUIDES · CHAPTER 55

Teacher

Teacher MENU Today (the teacher's home page)

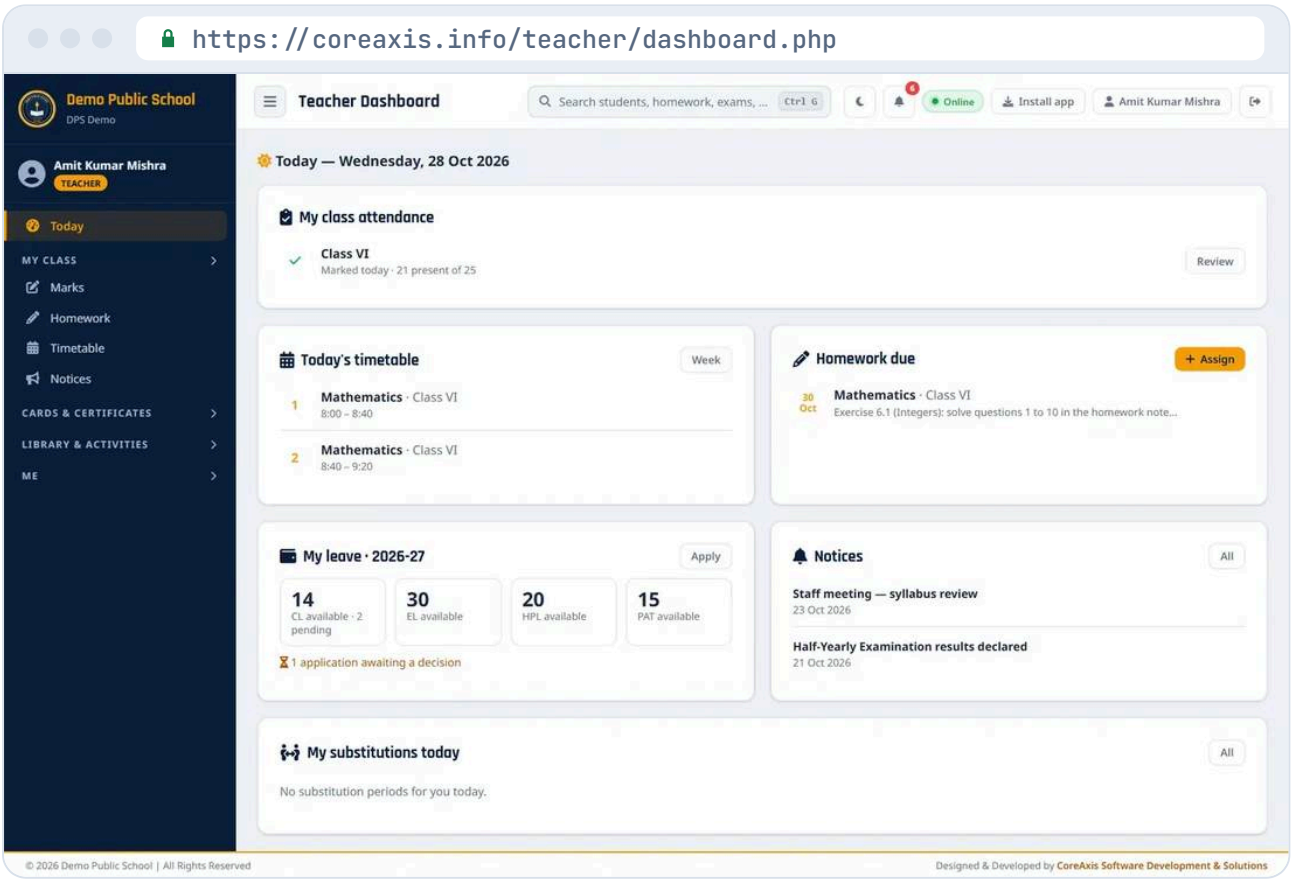
This guide follows Amit Kumar Mishra, Mathematics teacher and class teacher of Class VI-A at Demo Public School. A teacher sees only his own classes: he marks attendance and makes report cards for his class, enters marks and gives homework for the classes he teaches, and handles his own leave and substitutions. Each section points to the module chapter that explains the screen in full (Attendance, Marks Entry, Homework, Timetable, Notices, Library, Leave, My Account).



Teacher — Demo Public School

The Today page at a glance

1 After signing in, the teacher lands on **Today**. Read it top to bottom before the first period.



Amit Kumar Mishra's Today page on Wednesday, 28 Oct 2026.

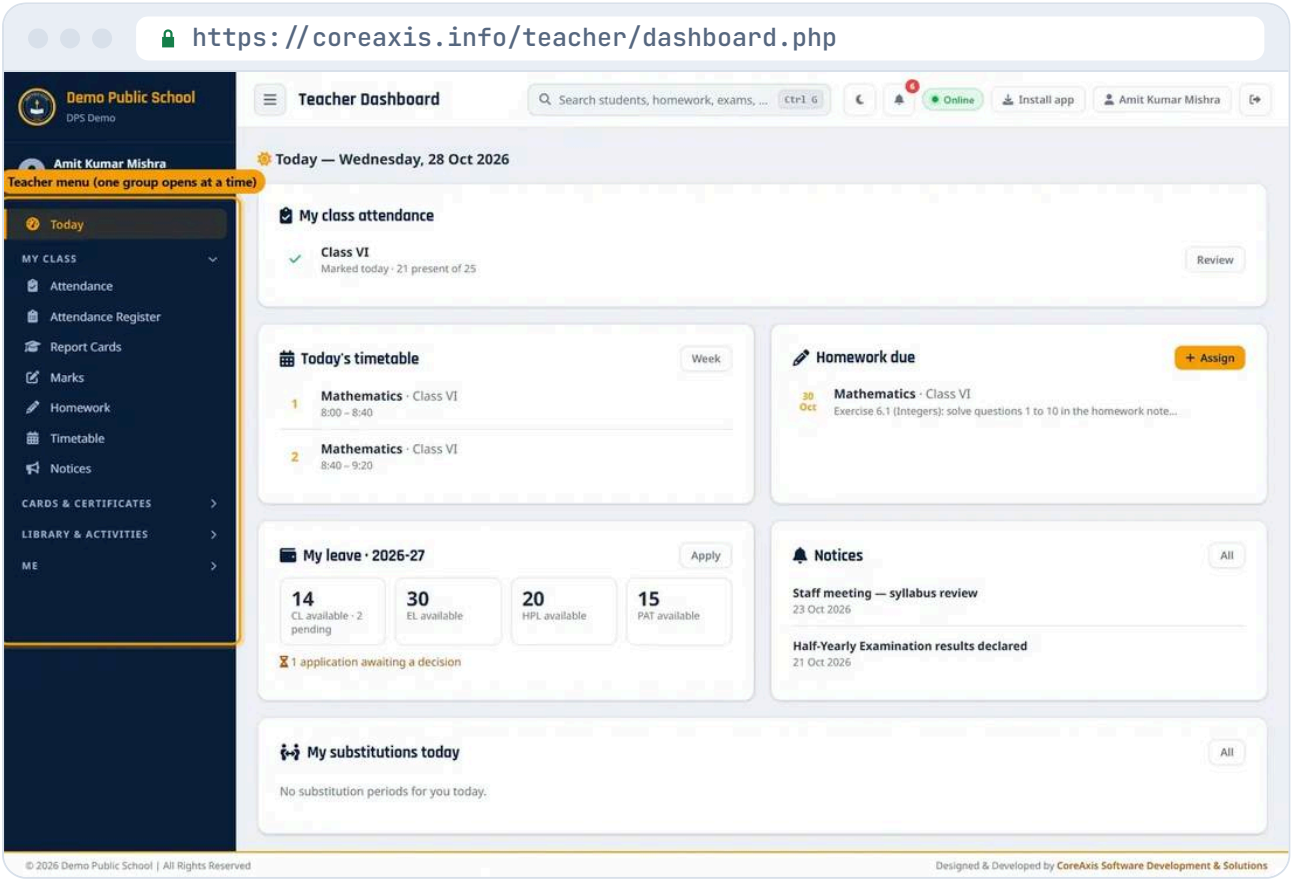
My class attendance	Whether today's attendance for your class is saved, and how many are present ("Marked today · 21 present of 25"). If it is not yet marked, the card says so. **Review** opens the attendance register for today.
Today's timetable	Your periods today with subject, class and time (Period 1 and 2: Mathematics, Class VI). **Week** opens the full timetable.
Homework due	Homework you gave that is due in the next 7 days, with the due date. **Assign** opens the homework form.
My leave · 2026-27	Leave balance by type (CL, EL, HPL, PAT) and how many applications are awaiting a decision. **Apply** opens My Leaves.
Notices	The latest notices for teachers and for everyone. **All** opens the Notice Board.

My substitutions today	Periods you must take today for an absent colleague, if the office has arranged any. **All** opens My Substitutions.
Top bar	Search (Ctrl + G) finds students, homework and exams of your classes. The bell shows notifications. Your name opens My Profile; the last icon signs you out.

The teacher's menu

Groups open one at a time. Click a group name (My Class, Cards & Certificates, Library & Activities, Me) to open it.

1. Open **My Class** to see the class-teacher screens.



The teacher menu with My Class open.

My Class › Attendance	Mark daily attendance for your class. See the Attendance chapter.
My Class › Attendance Register	Month-wise register of your class (P / A / L for each day), printable.
My Class › Report Cards	Generate and print report cards for your class.

Marks	Exams of your class: create a class test, assign subjects, enter marks. See the Marks Entry chapter.
Homework	Give, edit and delete homework. See the Homework chapter.
Timetable	Week timetable of any class; you can edit only your own class. See the Timetable chapter.
Notices	Read notices and post a new notice. See the Notices chapter.
Cards & Certificates › Student ID Cards, Admit Cards, Exam Certificates	Print ID cards, admit cards and exam certificates for your class.
Library & Activities › Library Desk, Competitions	Issue and return library books; record competitions and winners. See the Library chapter.
Me › My Payslips, My Attendance, My Substitutions, My Leaves, Holidays, My Profile	Your own salary slips, attendance, substitution periods, leave applications, the holiday list and profile. See the Leave and My Account chapters.

First period: mark today's attendance for Class VI-A

Attendance is marked once a day, in the first period. You can open it again later the same day to change a mark (for example, a student who went home with a leave note).

1. Click **My Class › Attendance**, or **Review** on the Today page.

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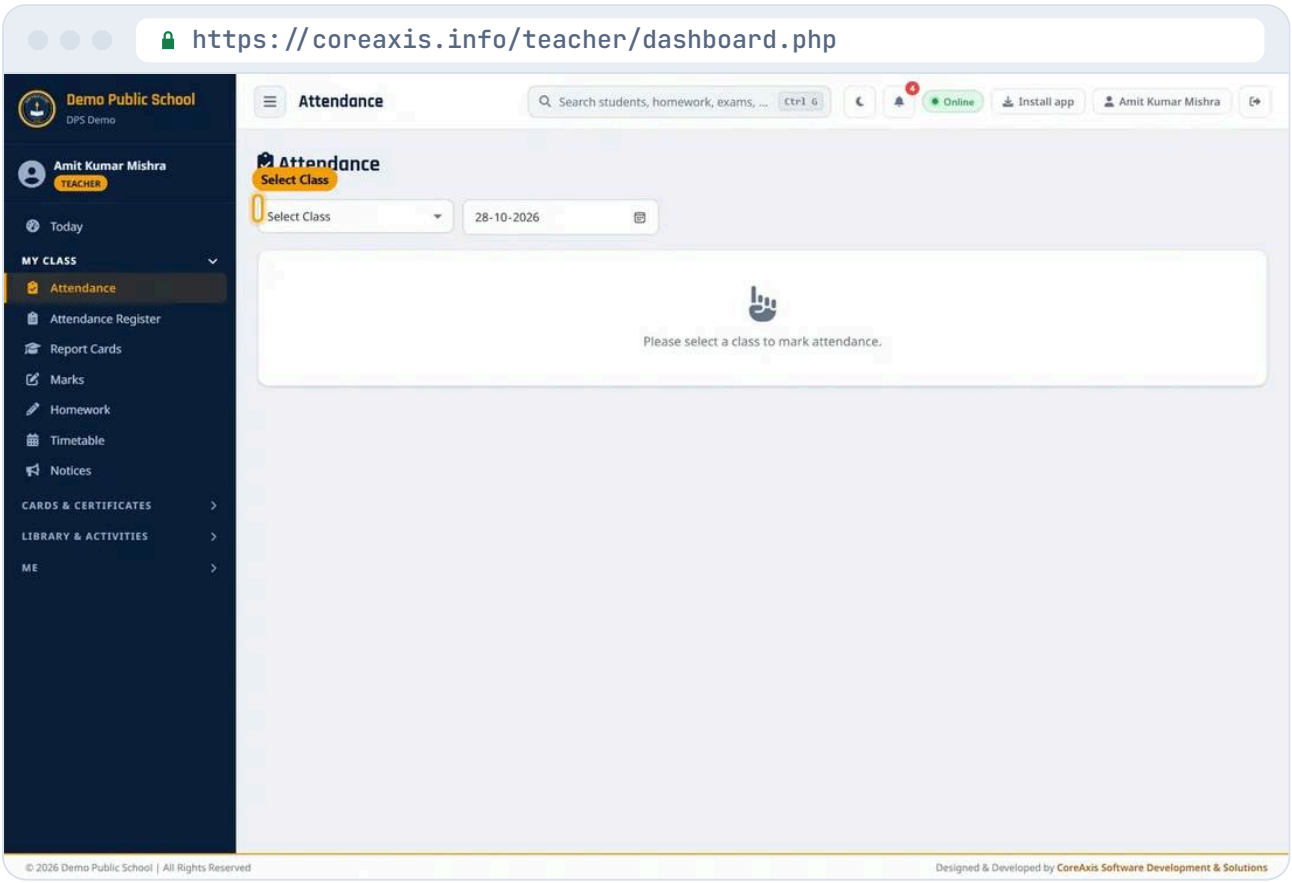
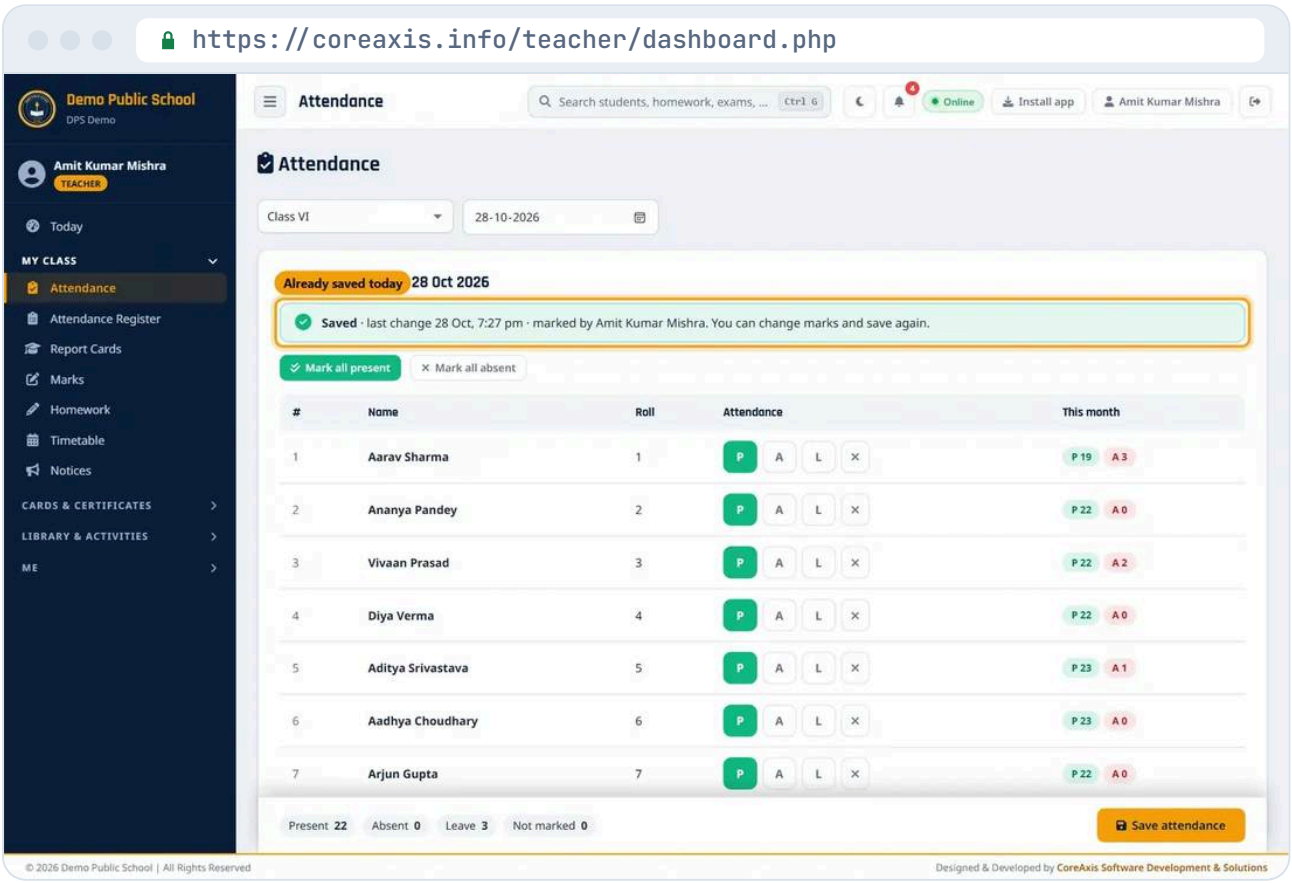
2 Choose **Class VI** in the class box. The date is today; you can pick an earlier date to correct it.



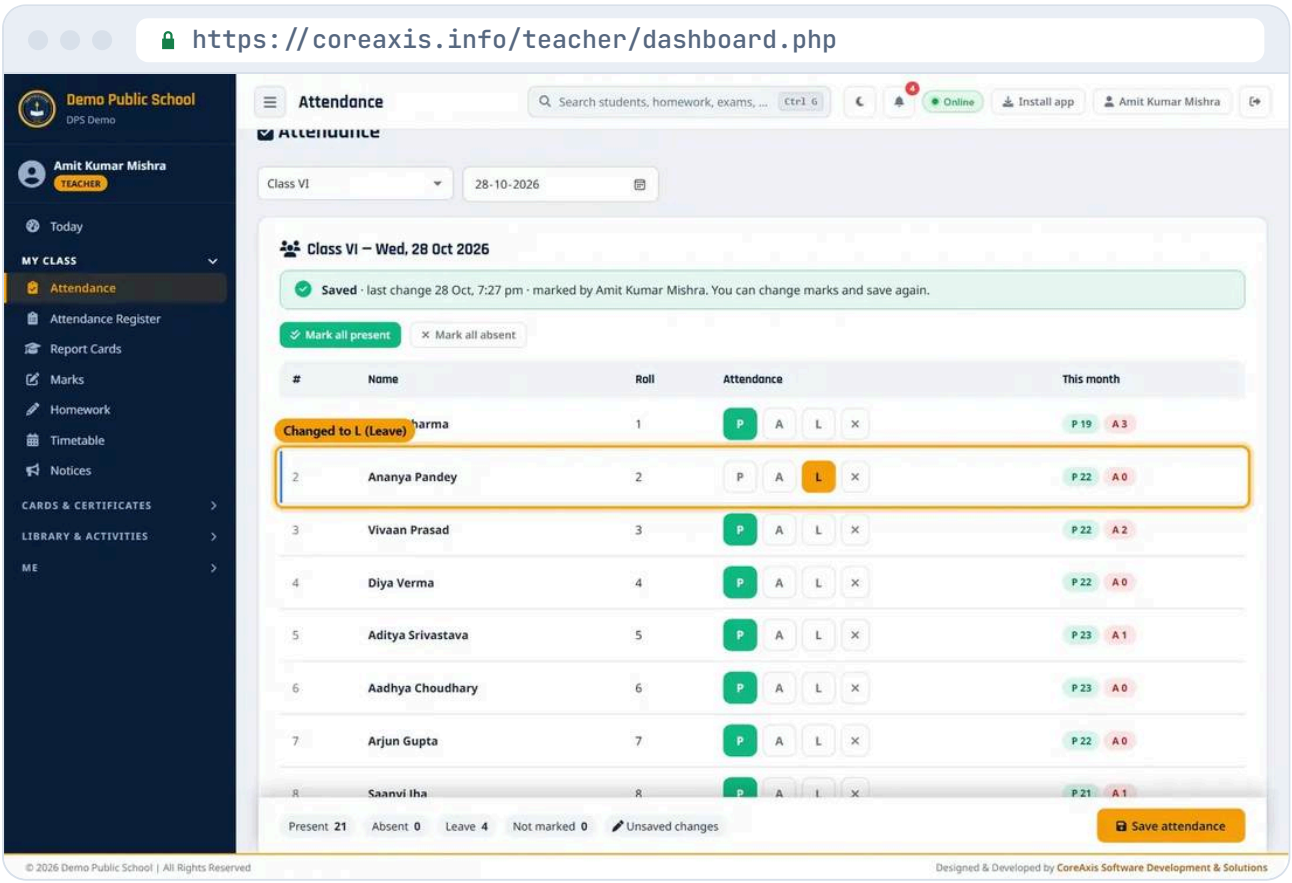
Select your class. Only your own classes are listed.

3 If the green **Saved** bar shows, attendance is already recorded today; you can still change marks. If it says **Not saved yet**, click **Mark all present** first.



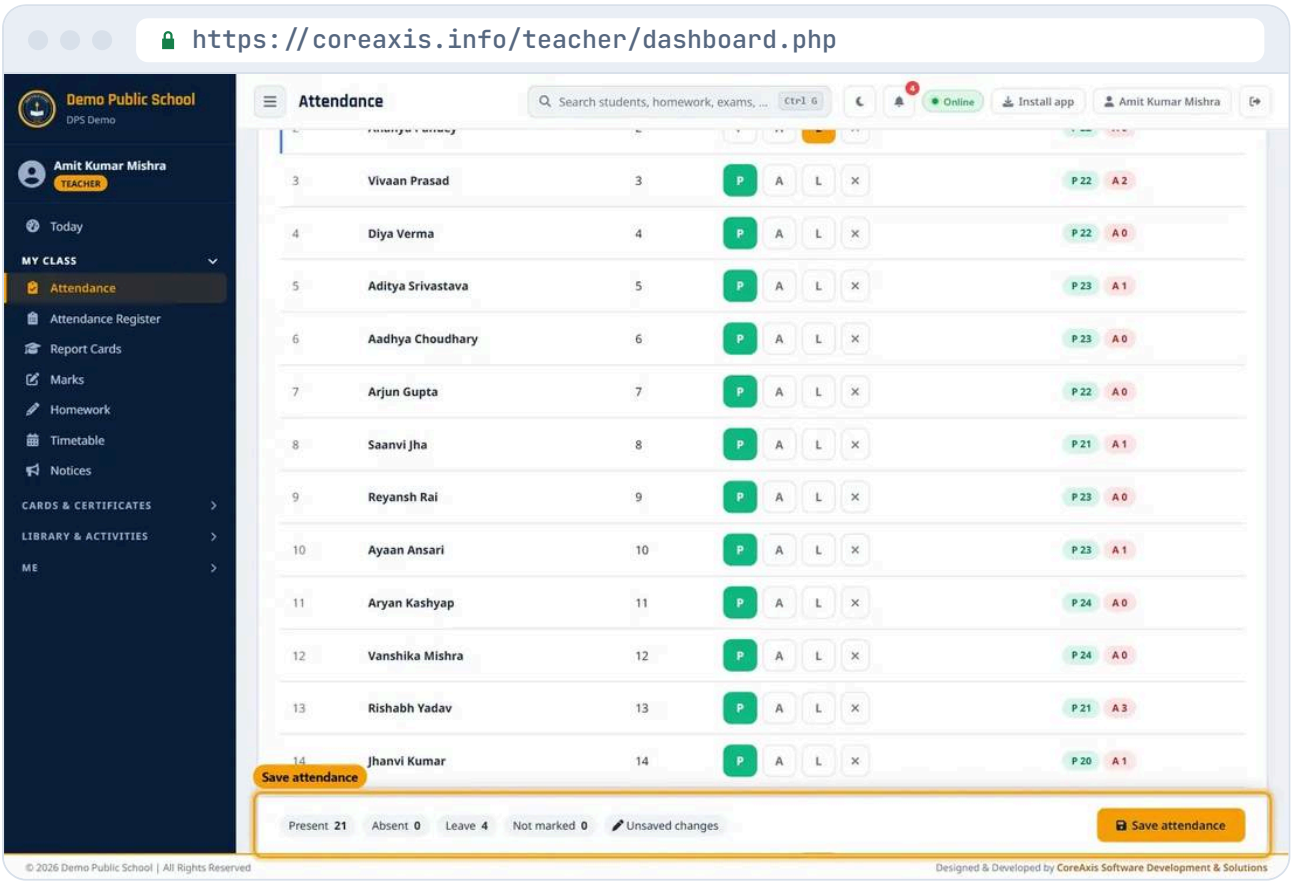
Saved earlier today by Amit Kumar Mishra. The This month column shows each student's P and A count.

4 Change only the students who are not present: **A** for absent, **L** for leave. In the example, Ananya Pandey is marked **L** because her parents sent a leave note.



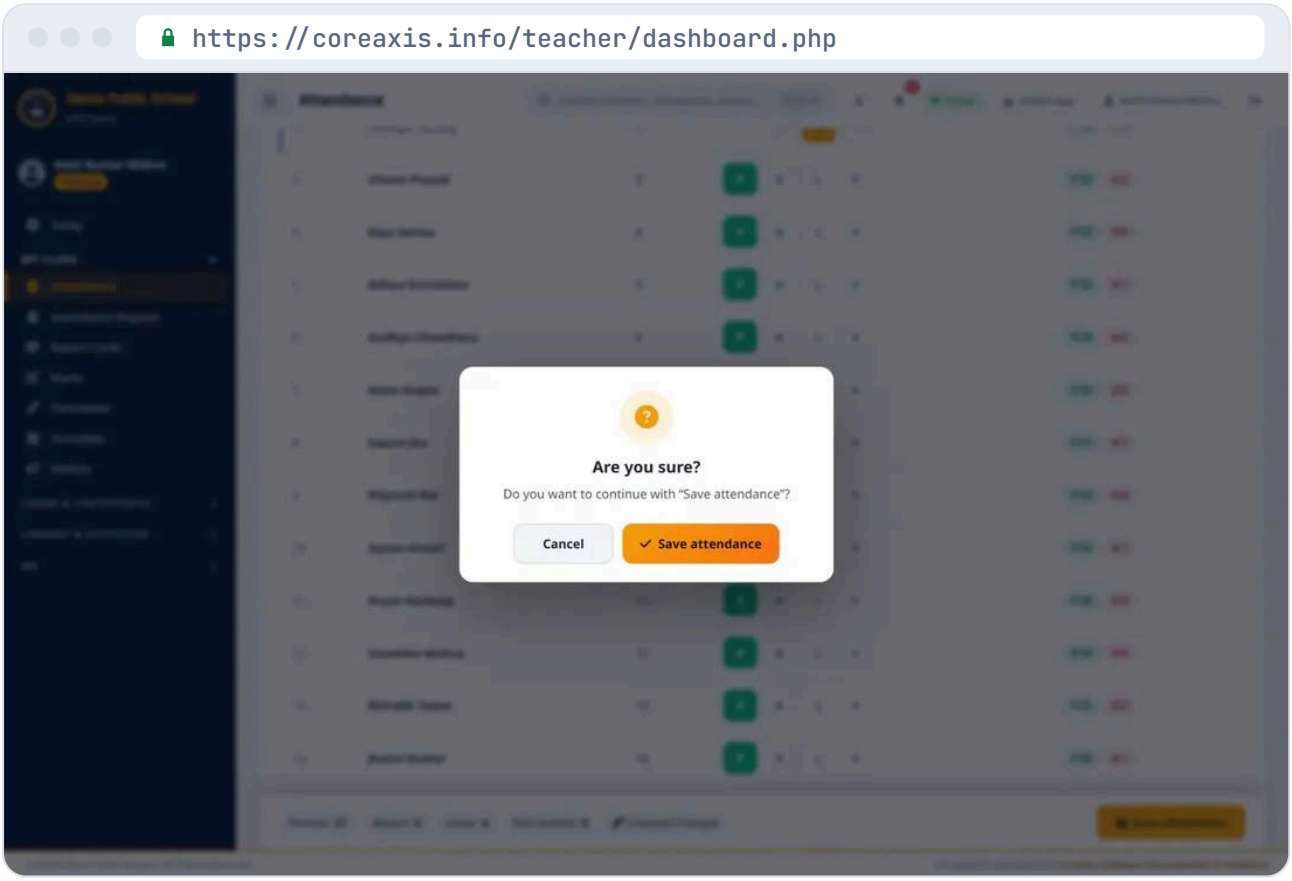
A changed row gets a blue edge until it is saved.

5 Check the counts in the bar at the bottom (Present, Absent, Leave, Not marked) and click **Save attendance**.



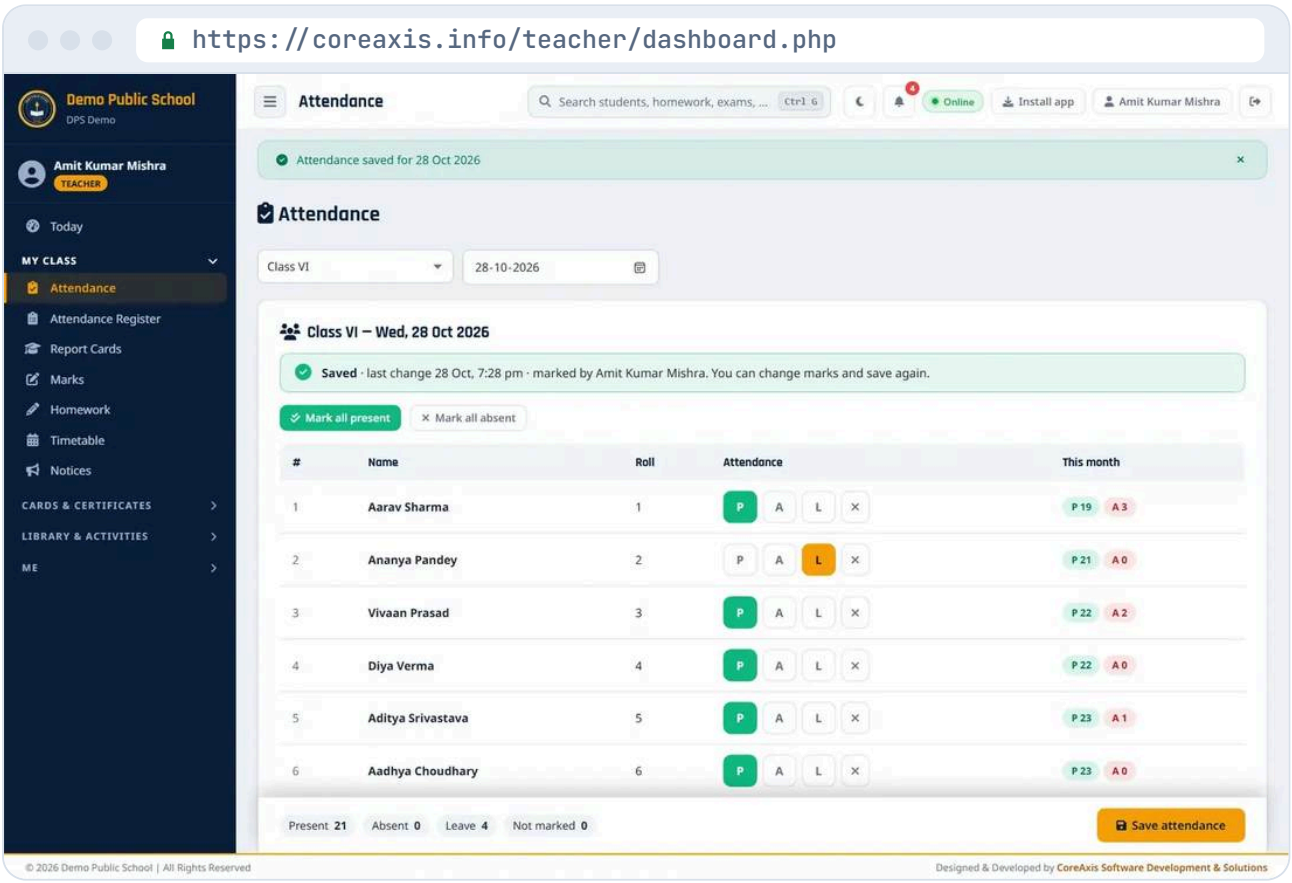
"Unsaved changes" shows until you click Save attendance.

6 Click **Save attendance** again in the popup to confirm.



Every save asks once for confirmation.

7 The message **Attendance saved for 28 Oct 2026** appears and the bar shows the time and who marked it.



Saved: Present 21, Leave 4, Not marked 0.

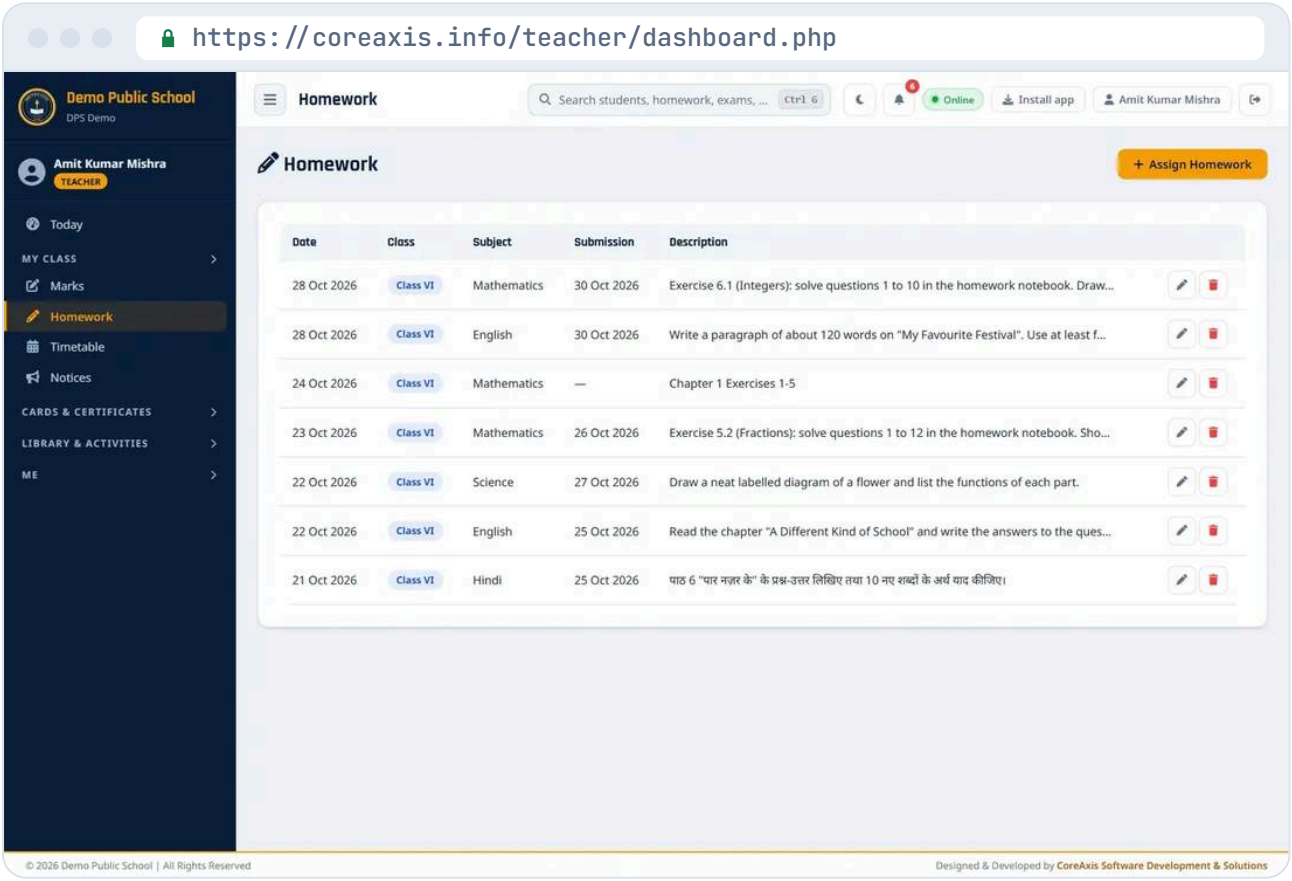
TIP The × button next to P / A / L clears a mark (leaves the student unmarked).

TIP Absent marks feed the parent portal, the attendance register, the attendance percentage on report cards, and absence SMS if the school uses it.

After class: give homework (example: Class

VI Mathematics, Exercise 6.1, due 30 Oct)

1. Click **Homework**, then **Assign Homework**.

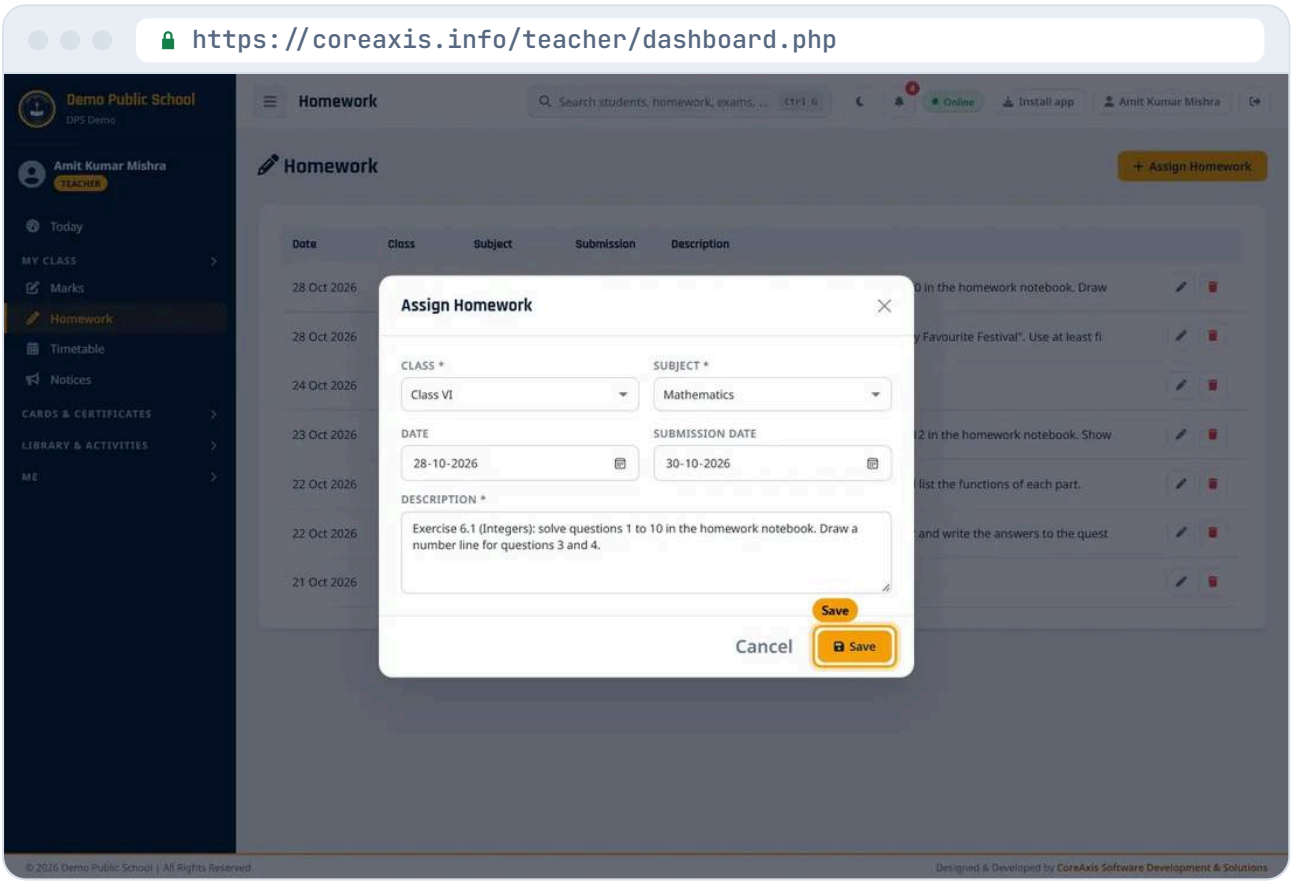


The homework list shows everything given to your classes, newest first. Hindi homework shows in Devanagari.

2. Choose **Class** (Class VI) and **Subject** (Mathematics).

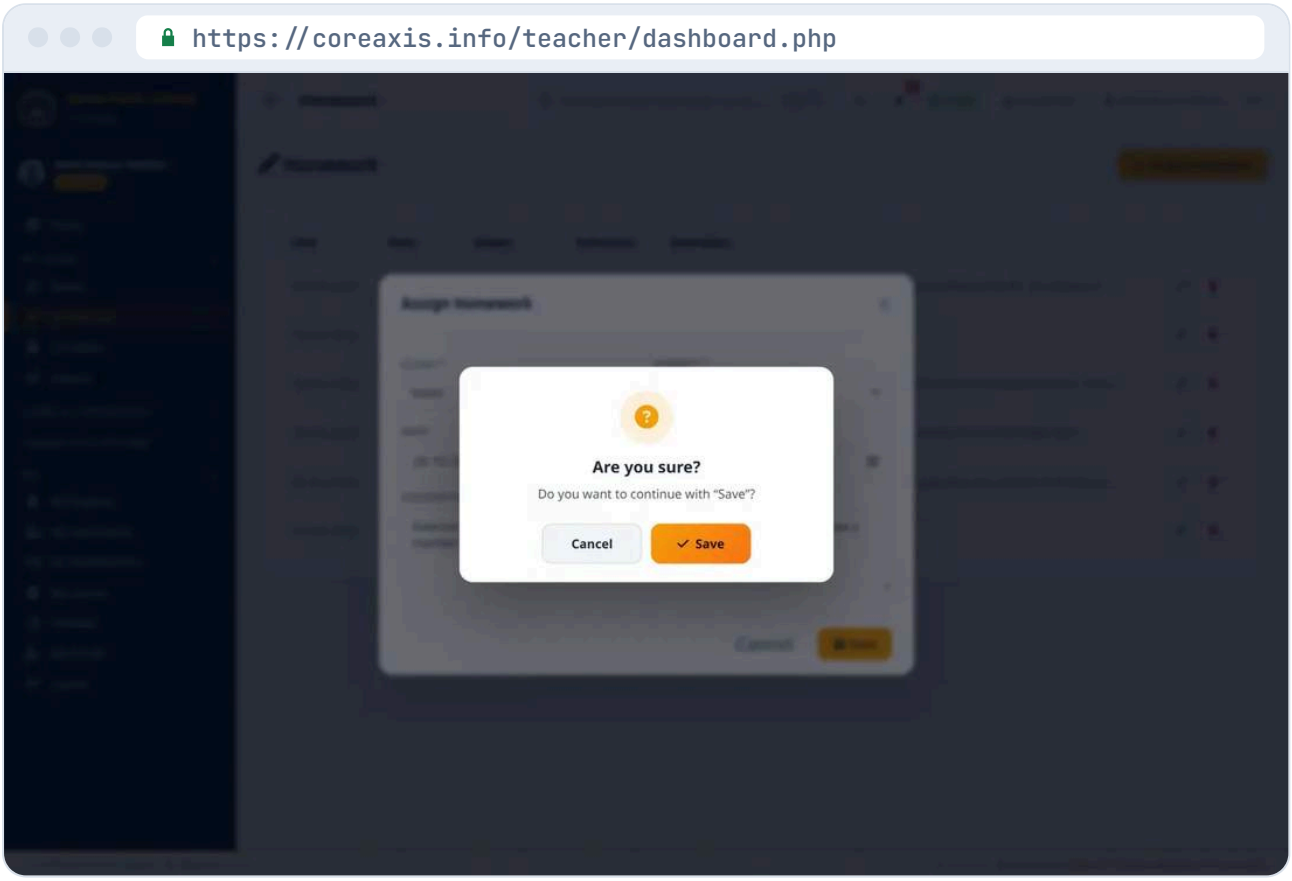
3. Keep **Date** as today and set **Submission Date** (30-10-2026).

4 Type the **Description**: "Exercise 6.1 (Integers): solve questions 1 to 10 in the homework notebook. Draw a number line for questions 3 and 4."

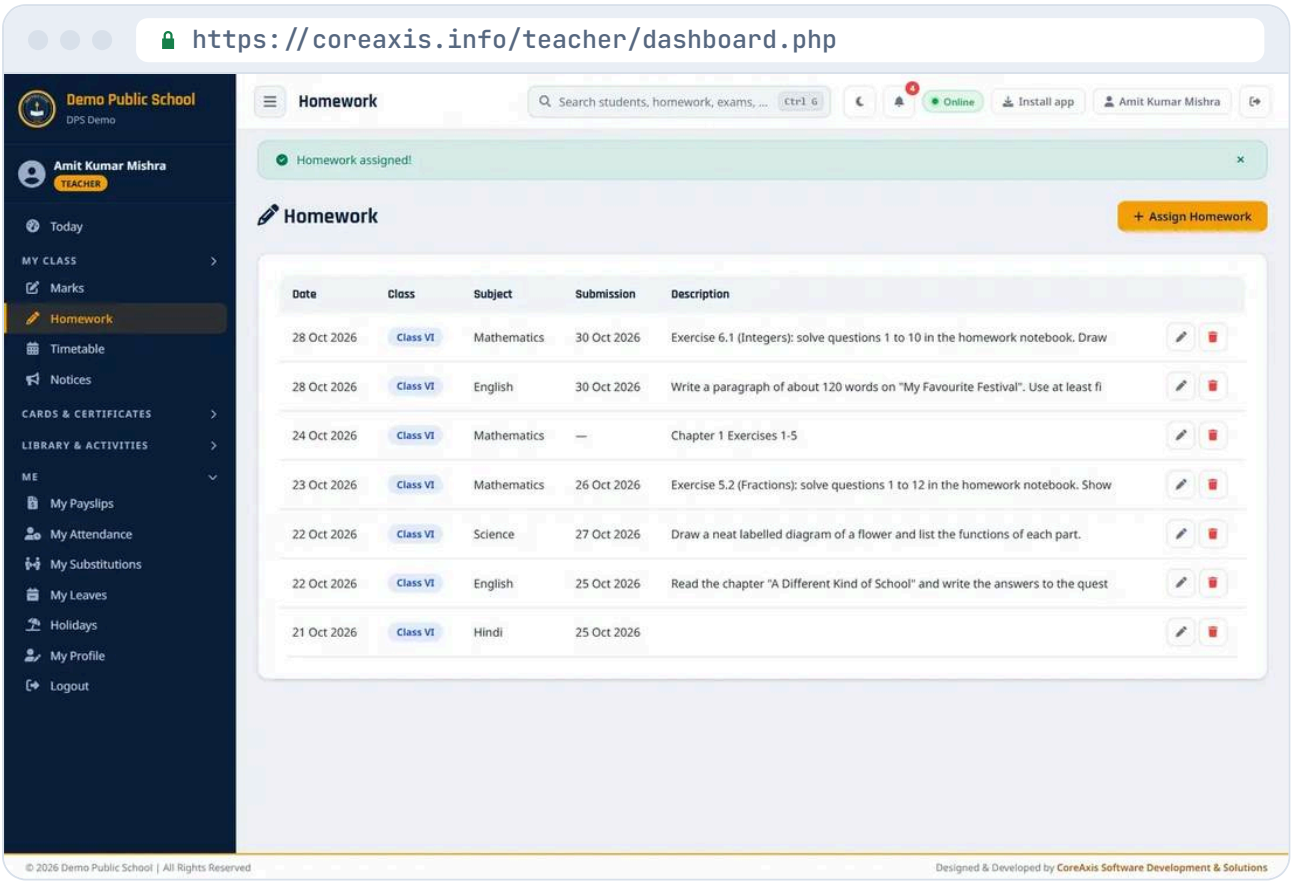


The filled Assign Homework form.

5 Click **Save**, then **Save** again in the popup.



6 The message **Homework assigned!** appears and the homework is at the top of the list. Students and parents see it at once in the portal and the app.



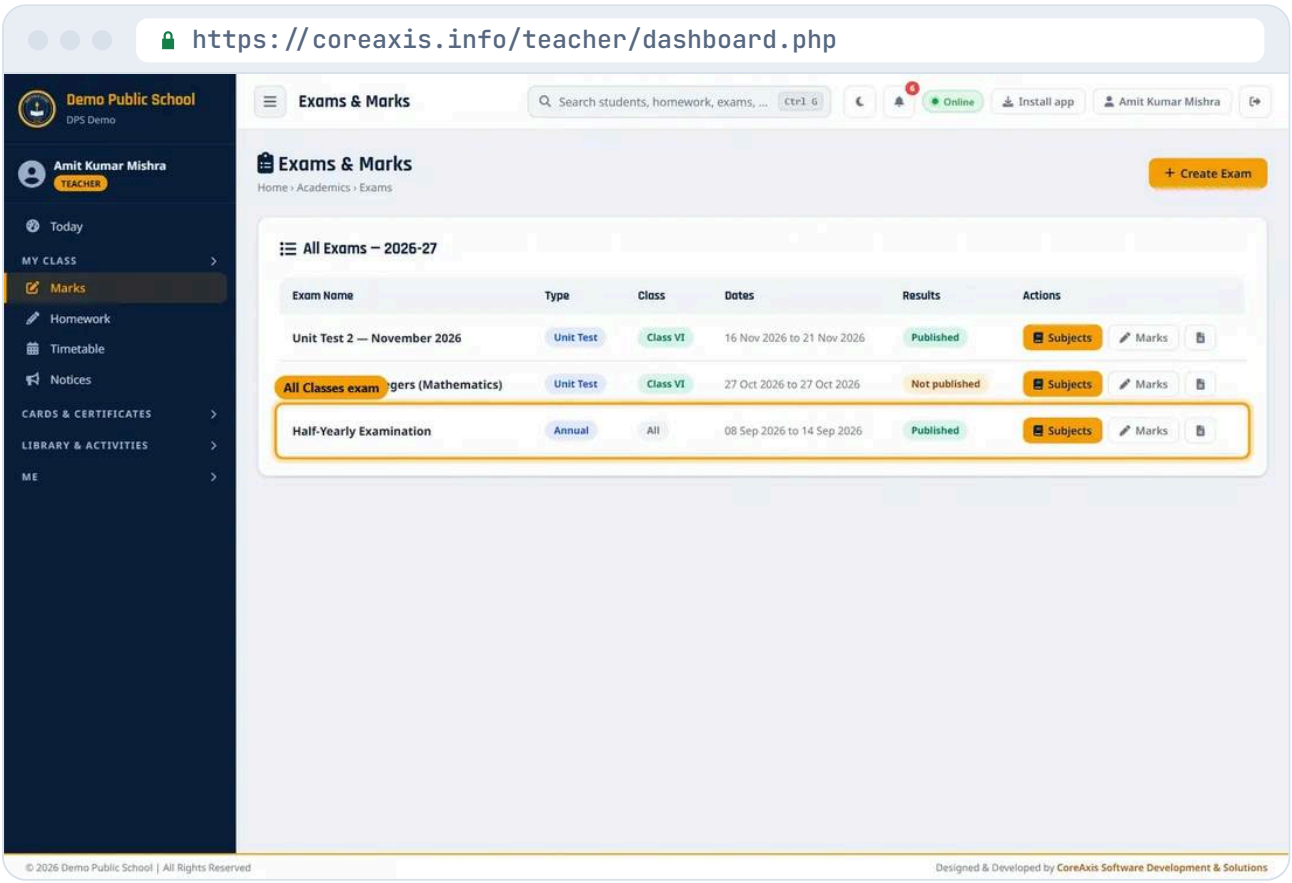
The new homework for Class VI, due 30 Oct 2026.

TIP Use the pencil icon to correct a homework; the red bin deletes it (it asks twice).

Enter marks for your subject (example: Class Test — Integers, Mathematics, out of 25)

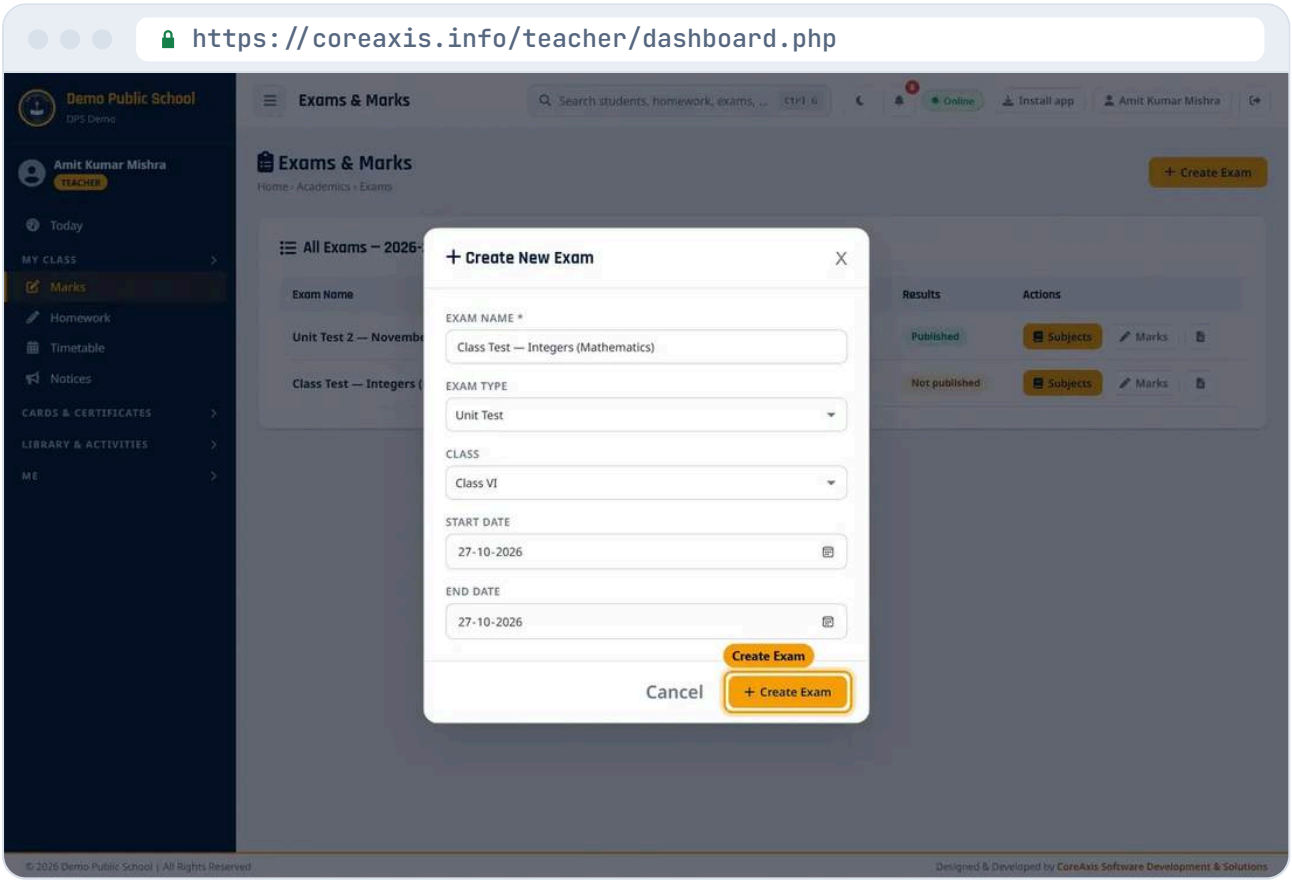
A teacher can create a test for his own class, choose the subject, and enter marks. Results are shown to students only after the Principal / Administrator publishes the exam.

1 Click **Marks**. The list shows the exams of your classes and the exams set for All Classes (the Half-Yearly Examination). Click **Create Exam**.



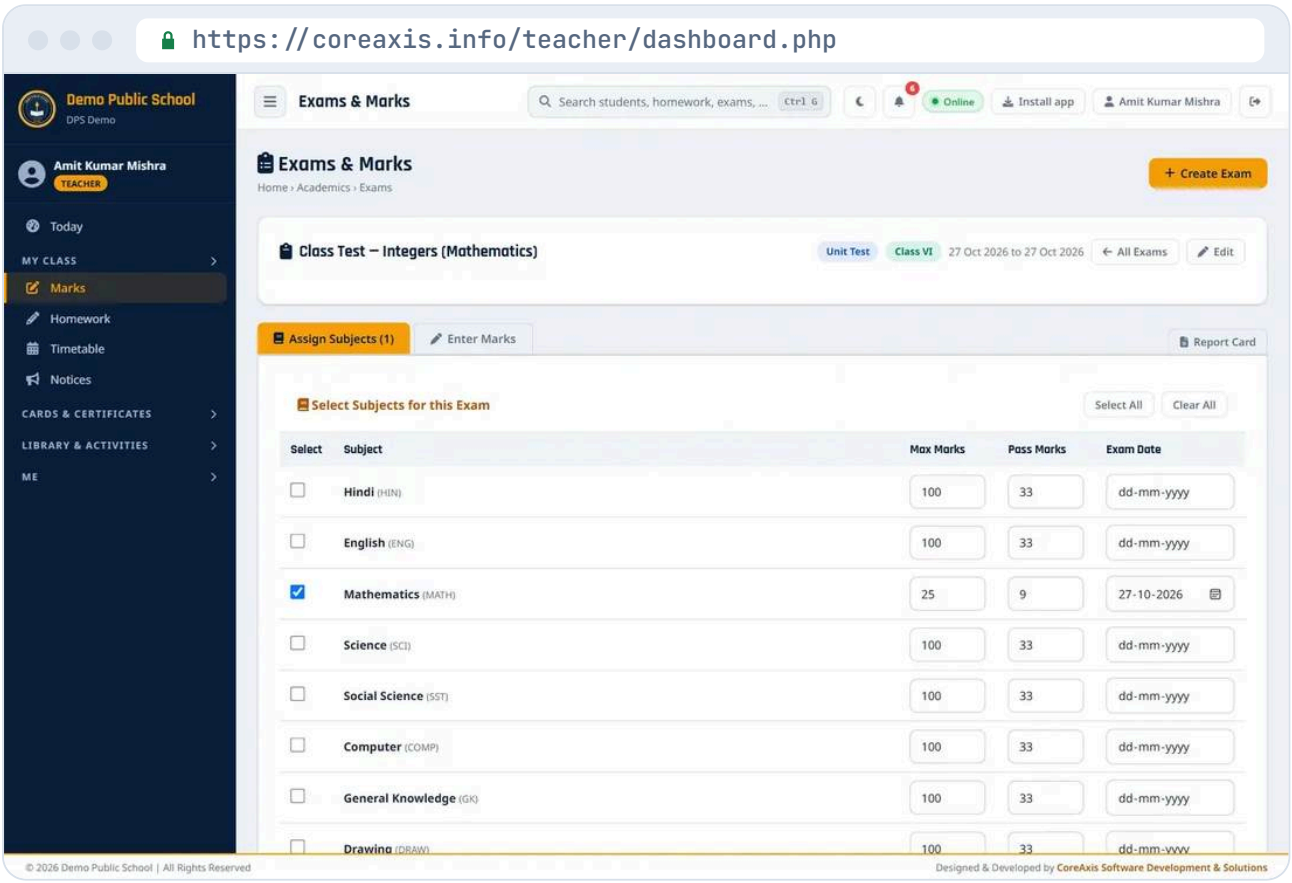
Exams of Class VI and the All Classes Half-Yearly Examination.

2 Fill **Exam Name** (Class Test — Integers (Mathematics)), **Exam Type** (Unit Test), **Class** (Class VI), **Start Date** and **End Date** (27-10-2026). Click **Create Exam** and confirm.



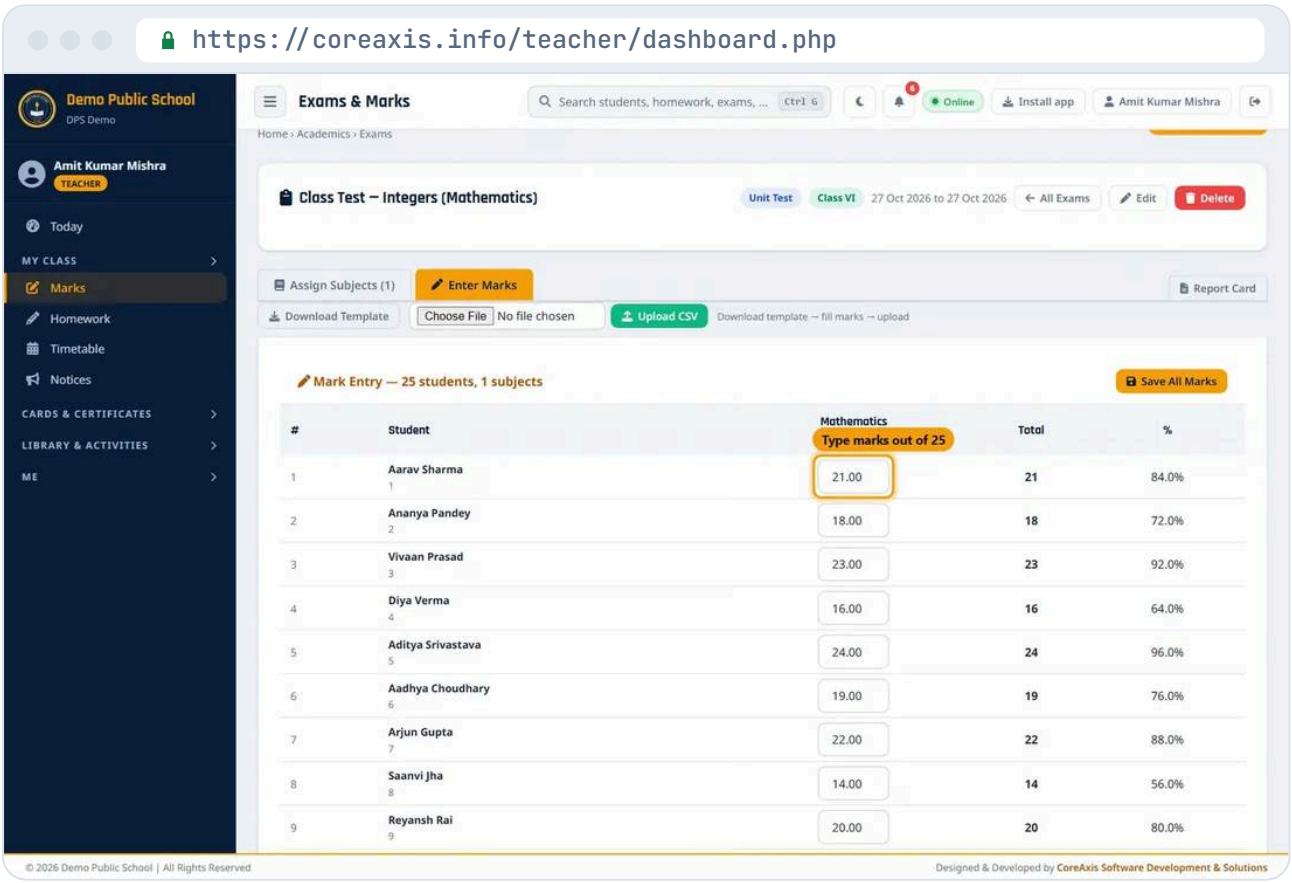
Teachers can choose only their own class.

3 On **Assign Subjects**, tick **Mathematics**, set **Max Marks** 25, **Pass Marks** 9 and the **Exam Date**. Click **Save Subject Assignment** and confirm.



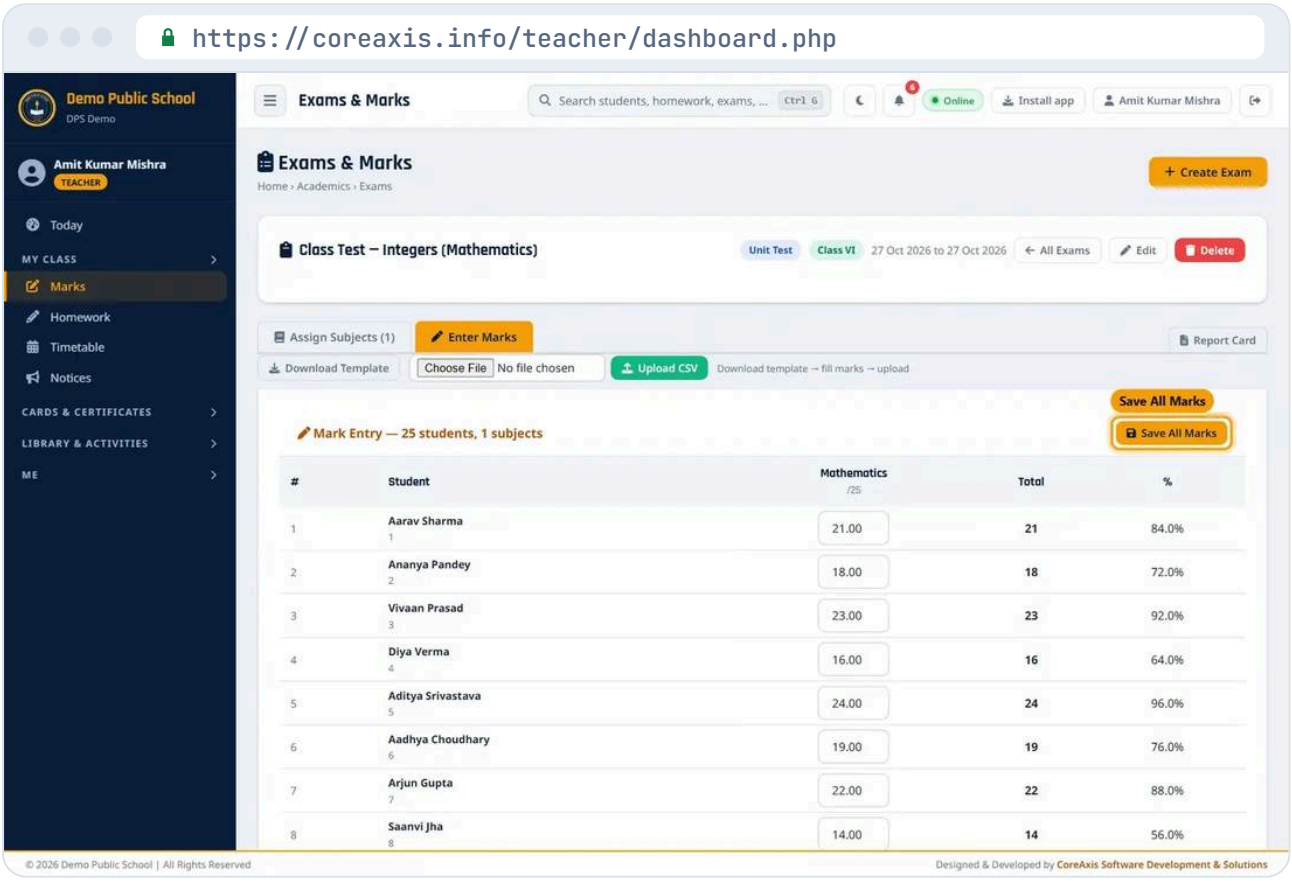
Only the ticked subject gets a marks column. A teacher has Edit but no Delete button.

4 Open **Enter Marks**. Type each student's marks in the Mathematics column. Total and % update as you type.

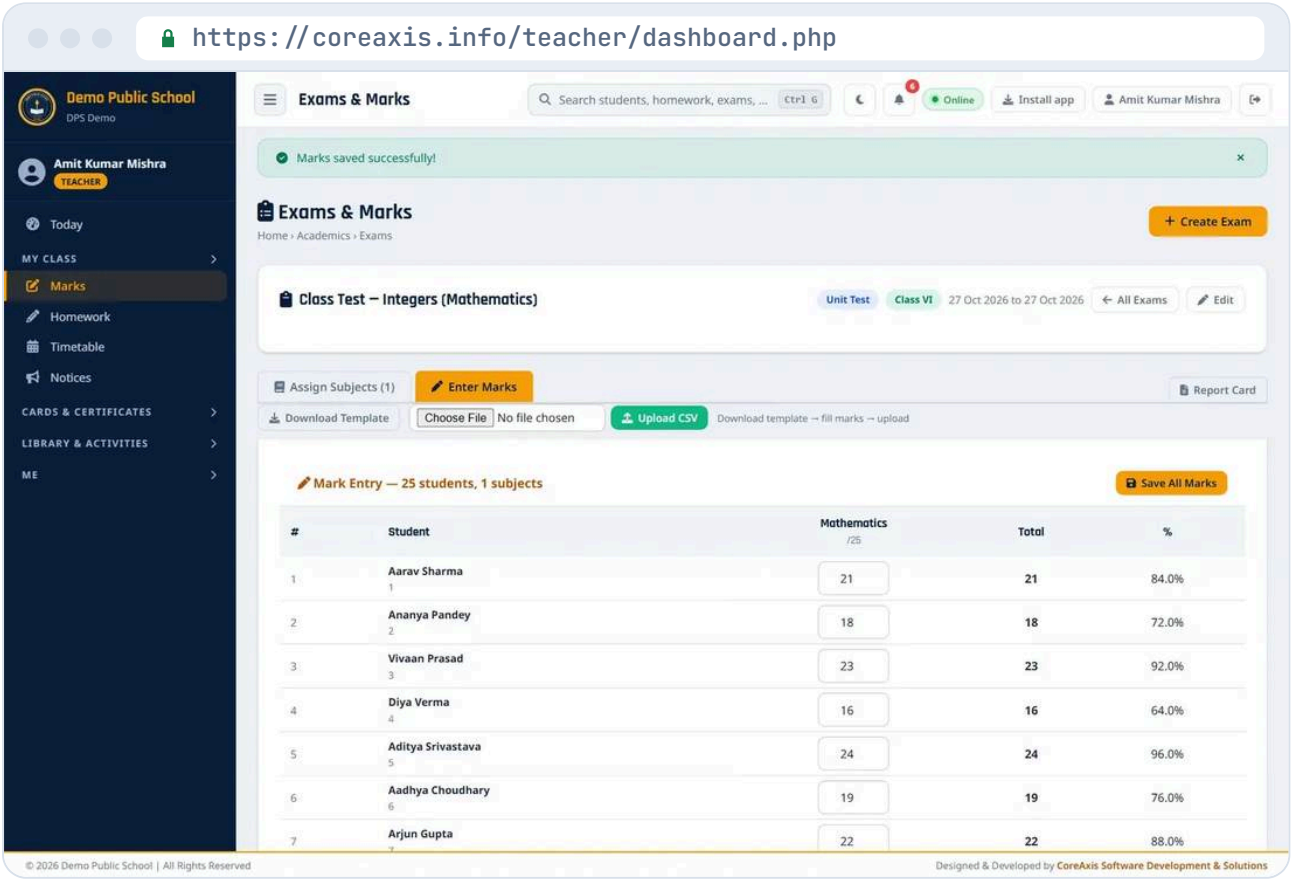


Mark Entry for 25 students, 1 subject.

5 Click **Save All Marks** (top or bottom of the table) and confirm.



6 The message **Marks saved successfully!** appears. You can come back and change marks until the exam is published.



Saved marks show as typed (21, 18 …).

TIP For a large class, use **Download Template**, fill marks in Excel, then **Upload CSV**.

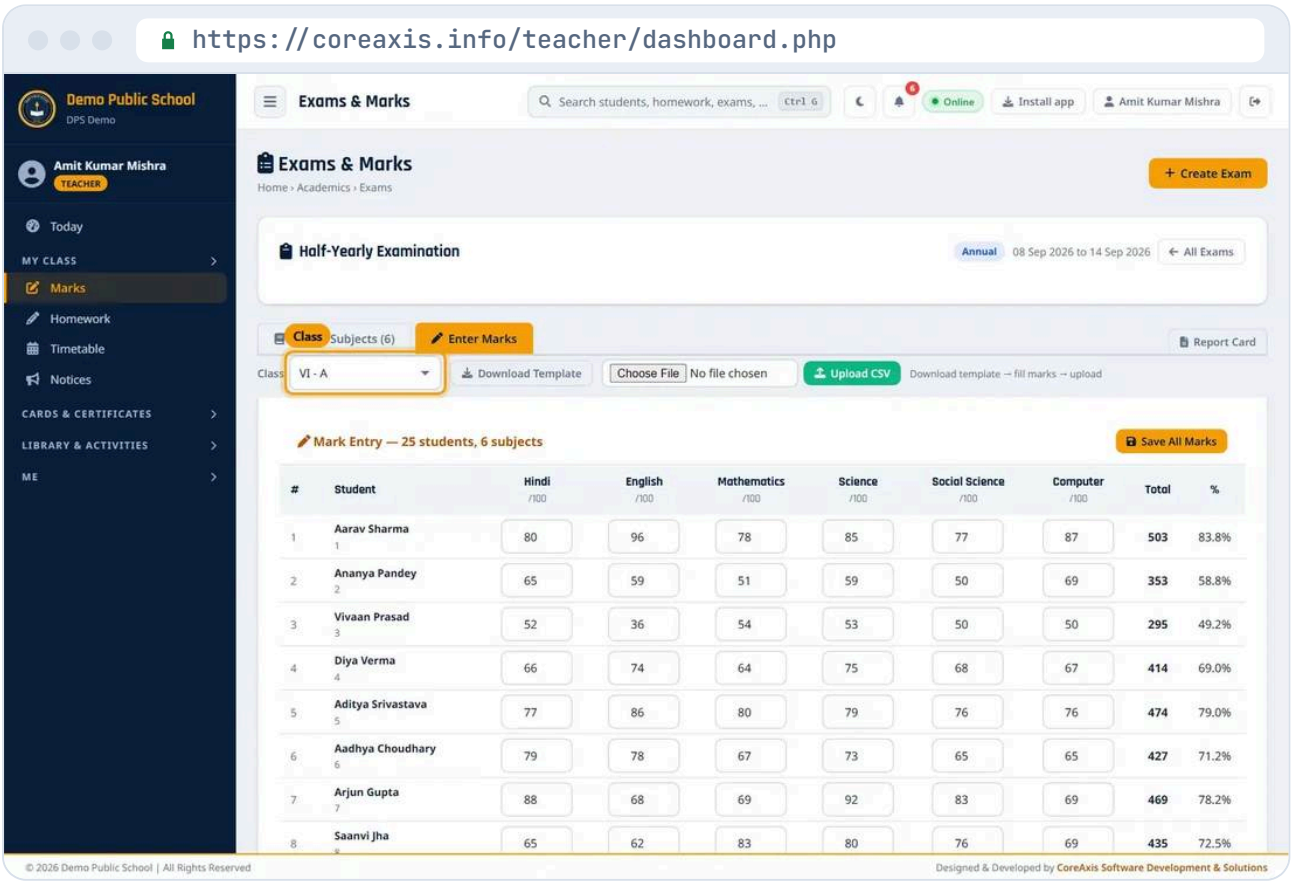
TIP Blank means "not entered"; type 0 for a student who scored zero.

Enter marks for a school-wide exam (example: Half-Yearly Examination, Class VI-A)

The Half-Yearly Examination is set for All Classes by the Principal. Each class teacher enters the marks of their own class.

1 Click **Marks**. In the row of **Half-Yearly Examination** (Class: All), click **Marks**.

2 The **Class** box shows your class (**VI - A**). It lists only your own classes. The sheet shows your 25 students and the exam's 6 subjects.



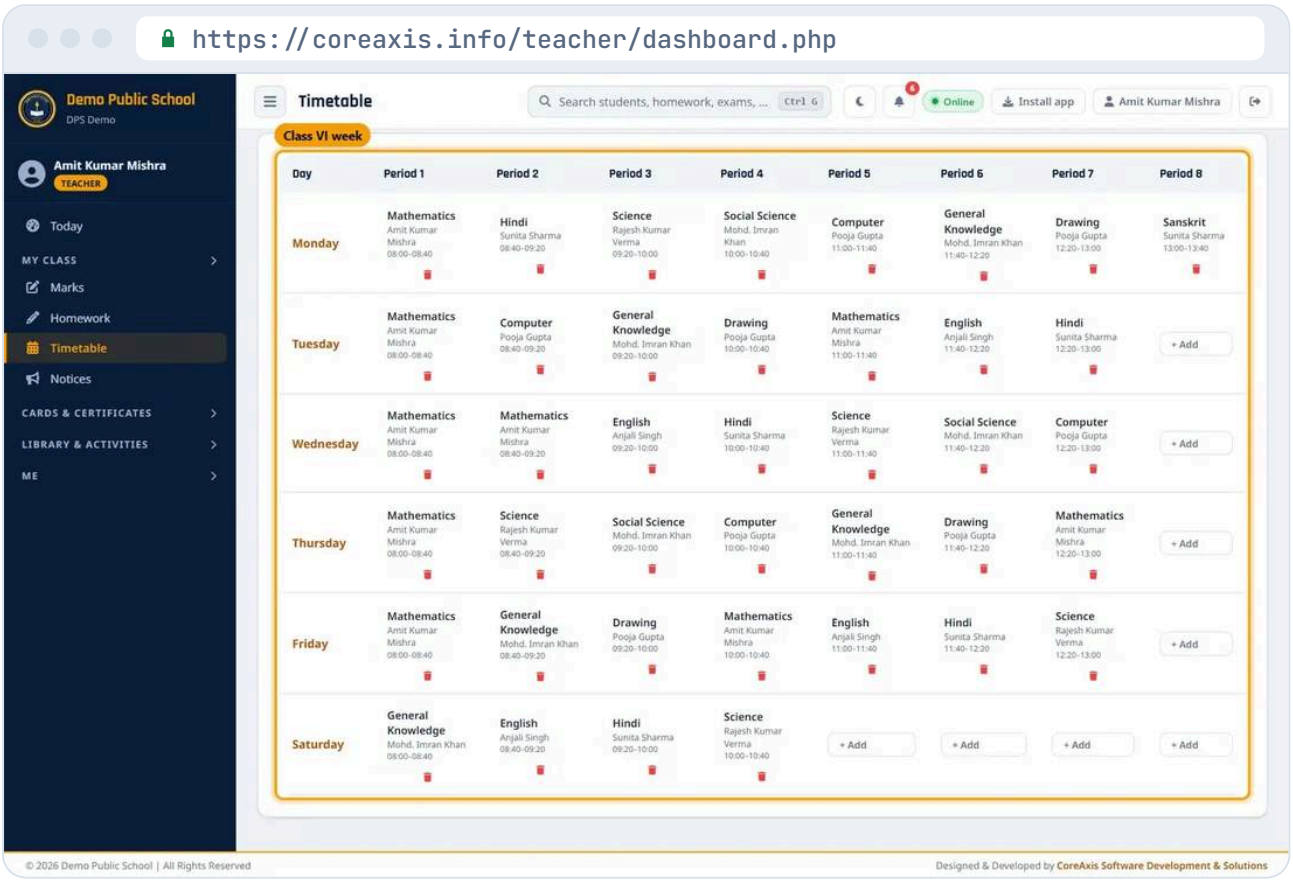
An All Classes exam: the Class box shows only your class. There is no Edit or Delete for this exam.

3 Type the marks and click **Save All Marks**, then confirm.

TIP The subjects, maximum marks and dates of an All Classes exam are set by the Principal or Administrator; the Assign Subjects tab is read-only for you.

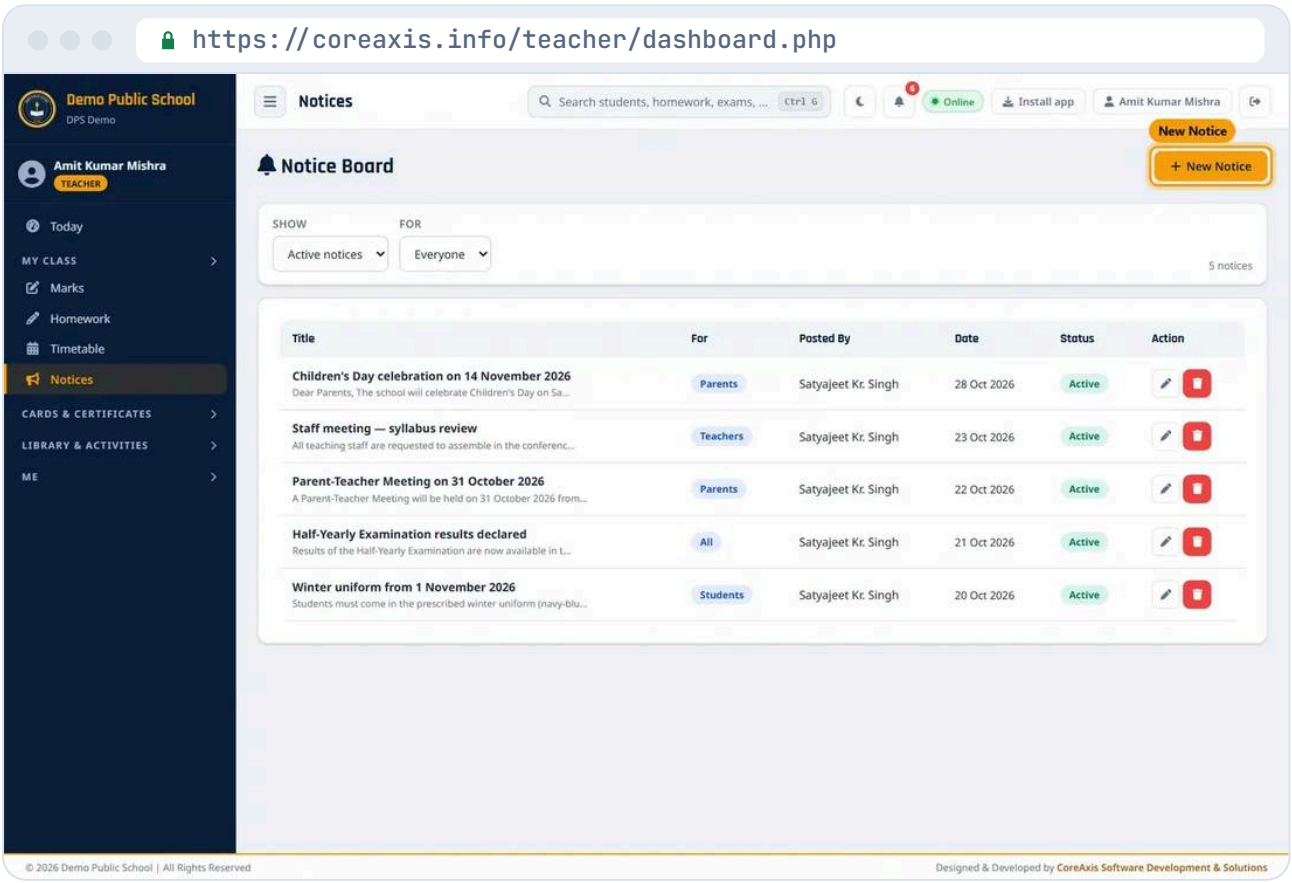
Check the timetable and notices

1. Click **Timetable** (or **Week** on Today) and choose **Class VI**. Each cell shows subject, teacher and time.



Class VI week timetable. You can add or remove periods only for your own class.

2 Click **Notices** to read the Notice Board. Use the **Show** and **For** filters to see active or removed notices and who they are for. **New Notice** posts a notice.



Notice Board: 4 active notices.

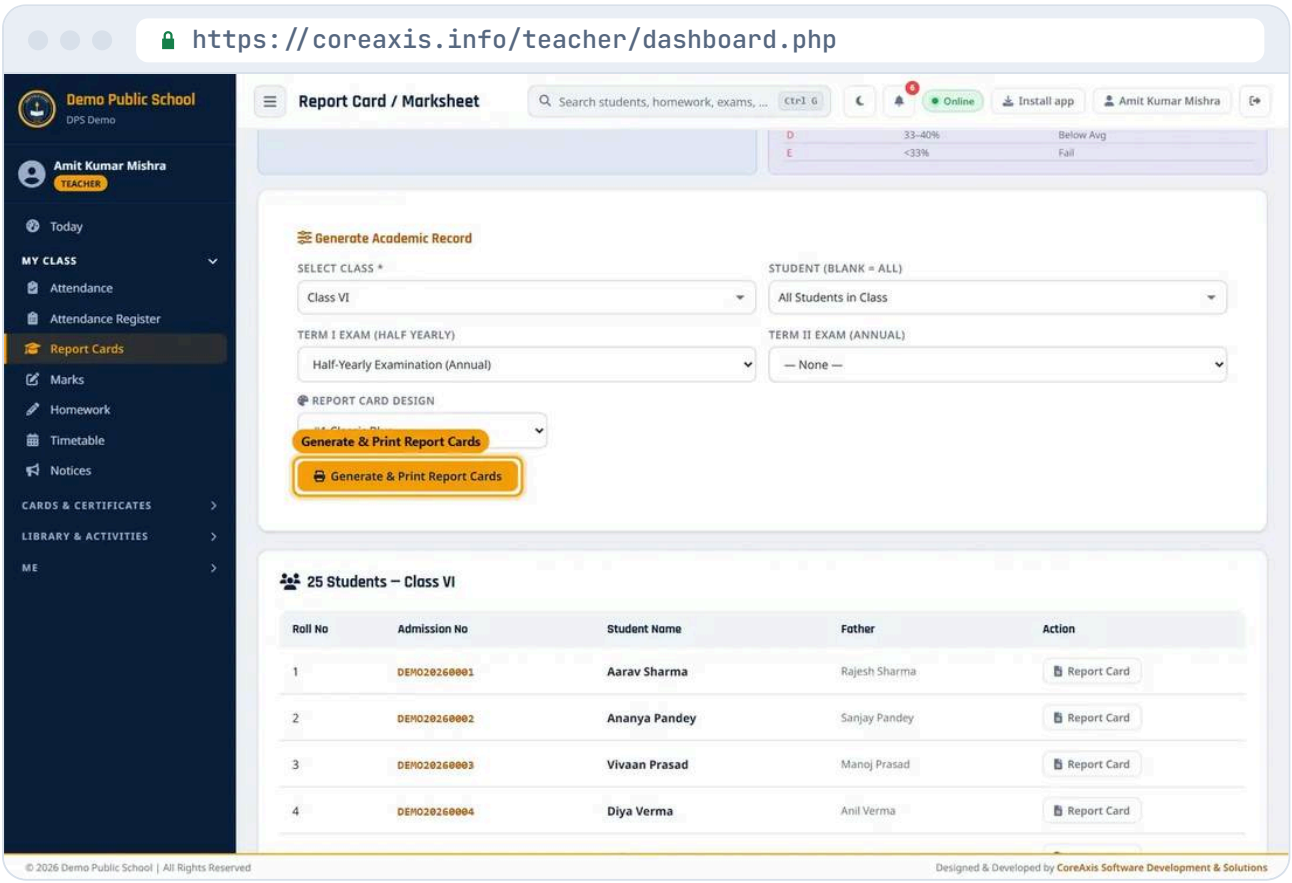
Print report cards for your class (example: Aarav Sharma, Half-Yearly)

1 Click **My Class › Report Cards**.

2 In **Select Class** choose **Class VI**. Leave **Student** as **All Students in Class**, or pick one student.

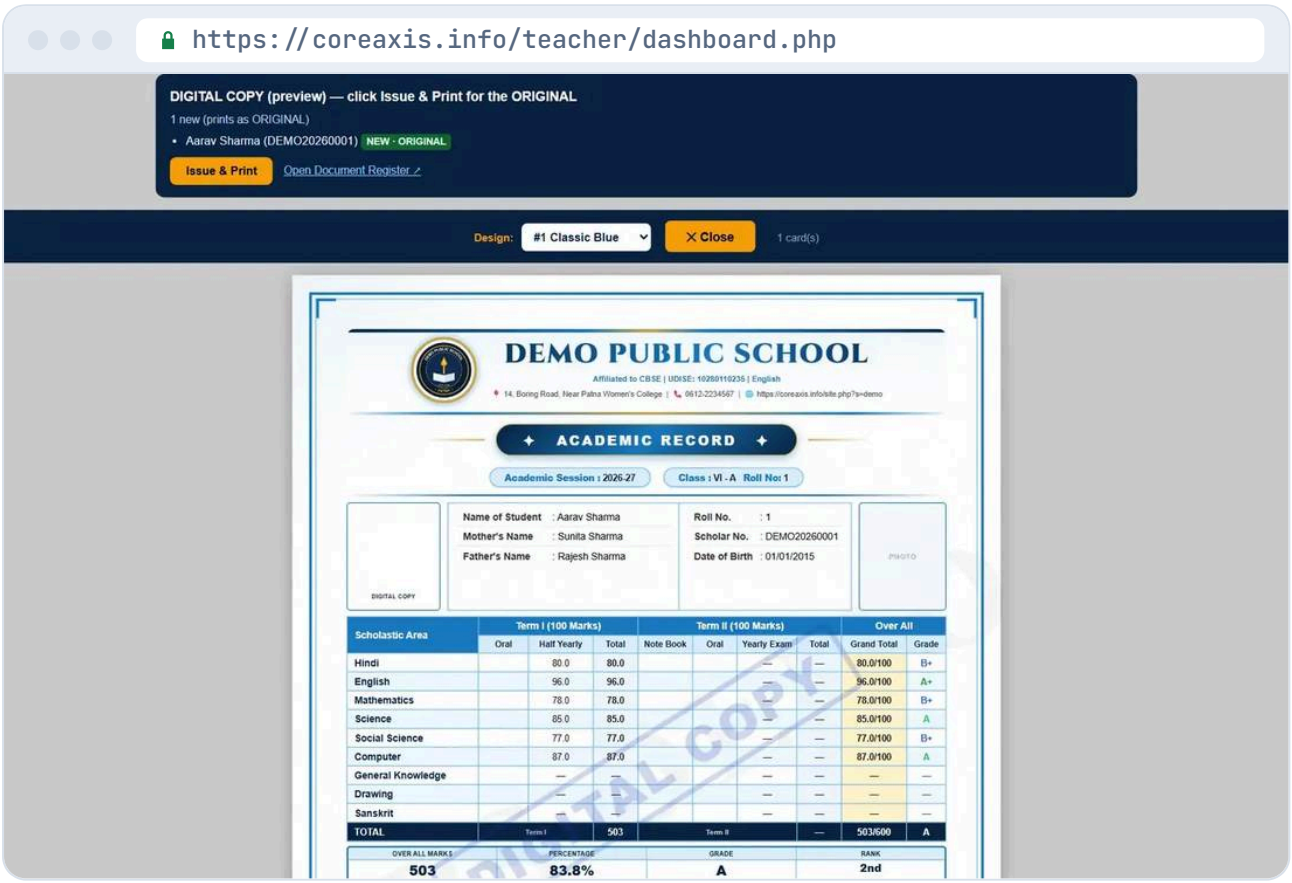
3 Choose **Term I Exam** (Half-Yearly Examination) and, at the end of the year, **Term II Exam** (Annual). Pick a **Report Card Design**.

4 Click **Generate & Print Report Cards**. For one student, click **Report Card** on his row.



Class VI, Term I = Half-Yearly Examination.

5 The cards open in a new tab as a **DIGITAL COPY (preview)**. Click **Issue & Print** to print the original; it is recorded in the Document Register.

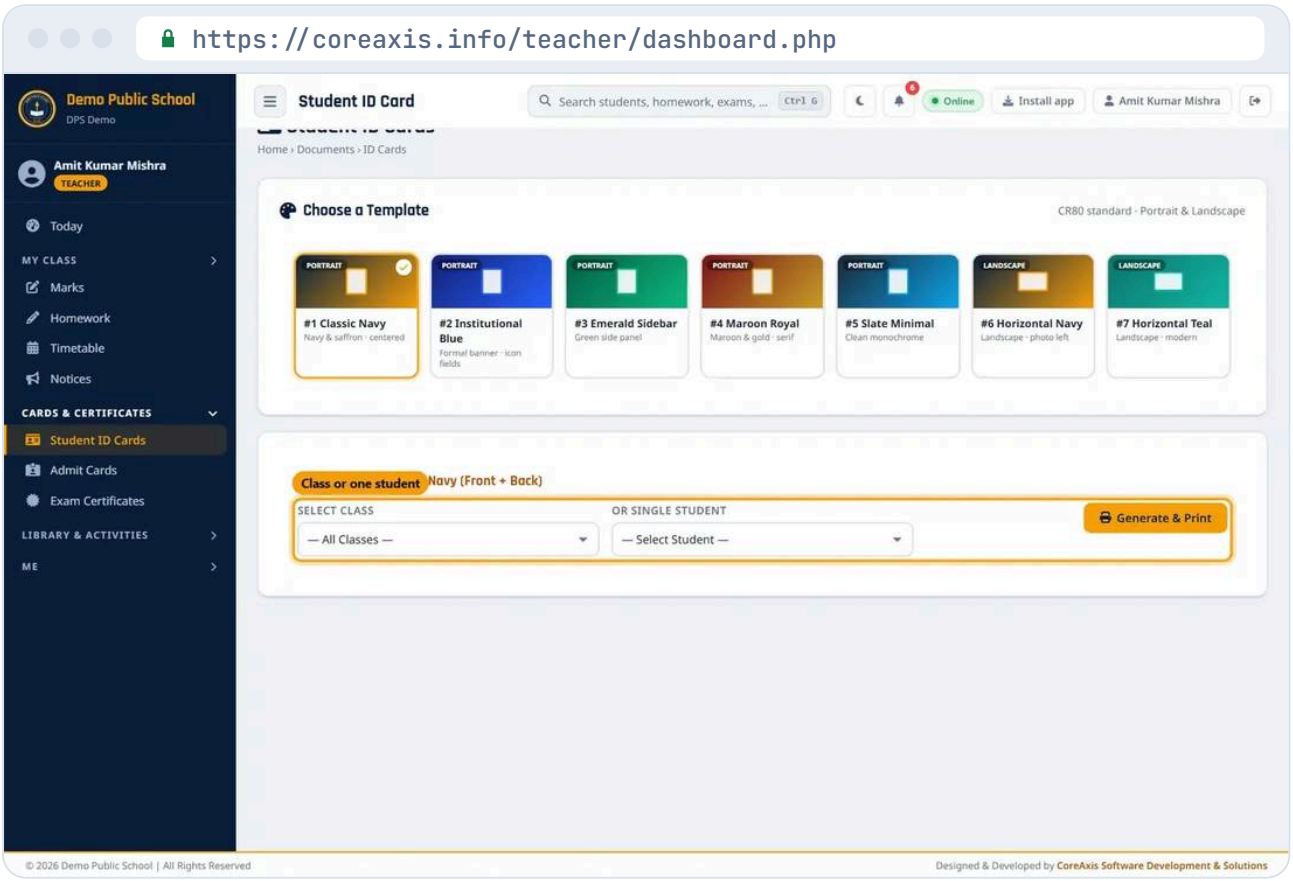


Aarav Sharma's academic record: 503/600, 83.8%, grade A, rank 2nd.

TIP A second print of the same report card prints as DUPLICATE COPY. See the Documents chapter.

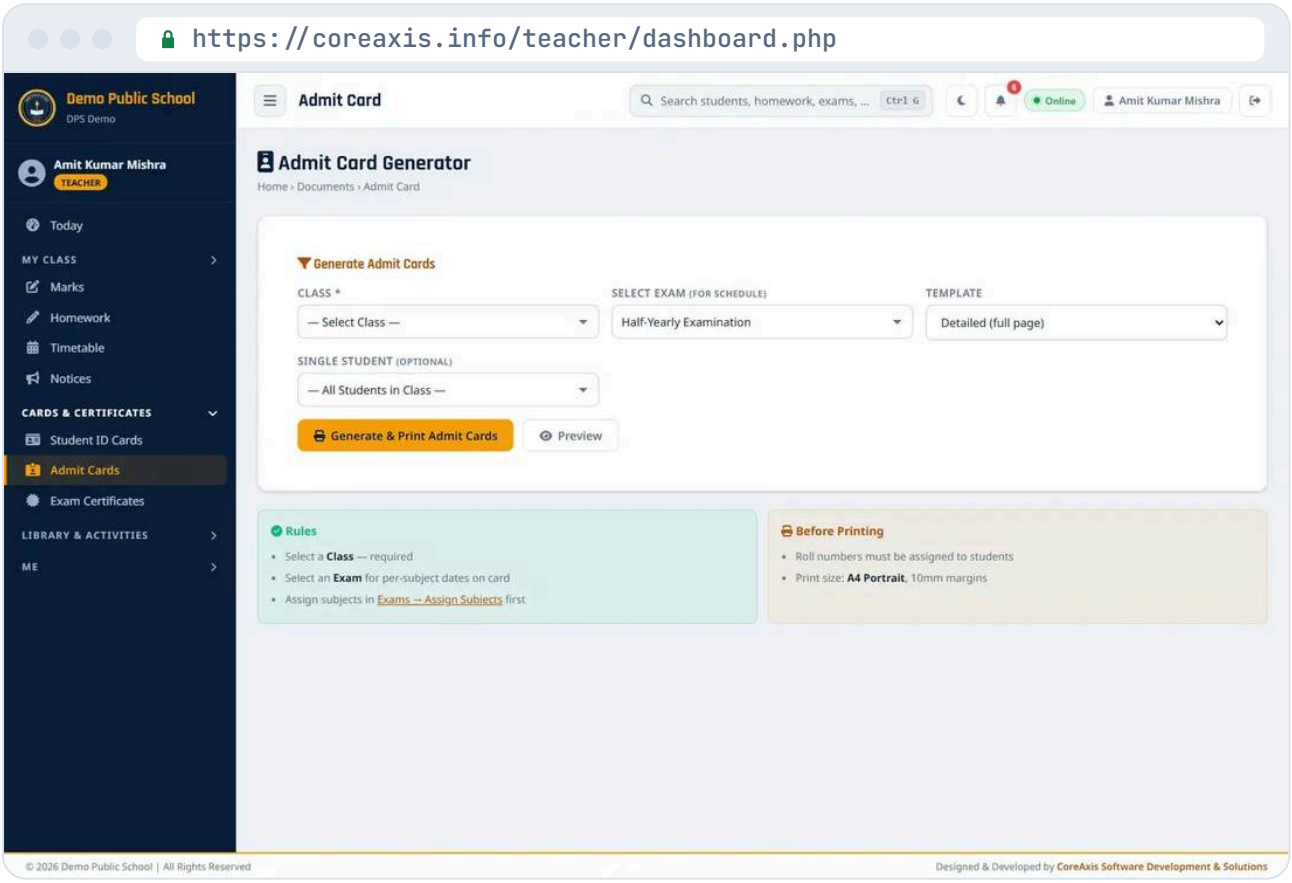
ID cards, admit cards and exam certificates

1 **Cards & Certificates › Student ID Cards**: choose a template (#1 Classic Navy to #7 Horizontal Teal), then a class or one student, and click **Generate & Print**.



Class VI students are listed; other classes are not.

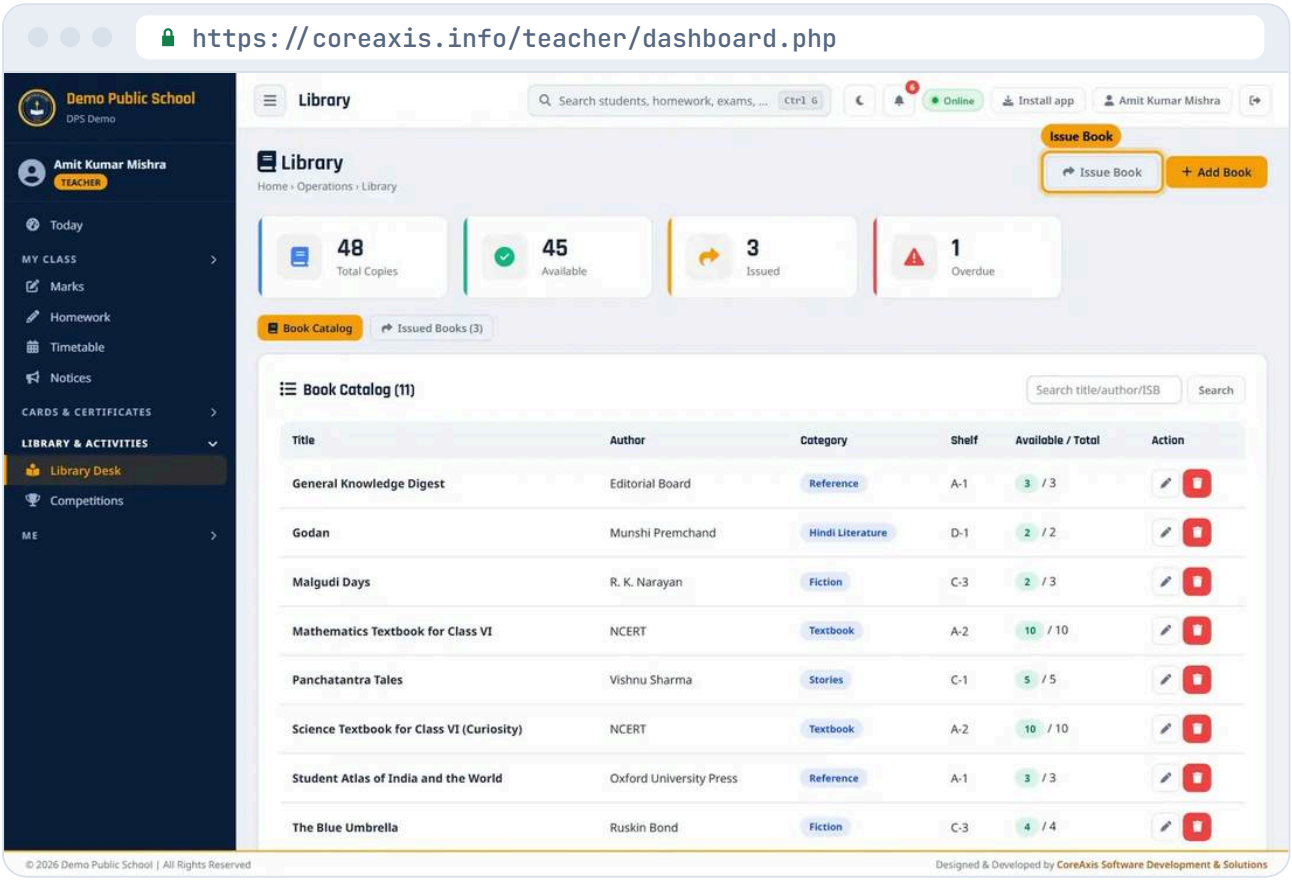
2 **Admit Cards**: choose **Class**, the exam (for the date sheet), the template (Detailed or Simple tabular) and, optionally, one student. Click **Generate & Print Admit Cards**.



3 **Exam Certificates**: print merit or participation certificates for an exam. See the ID Cards and Documents chapters for the full steps.

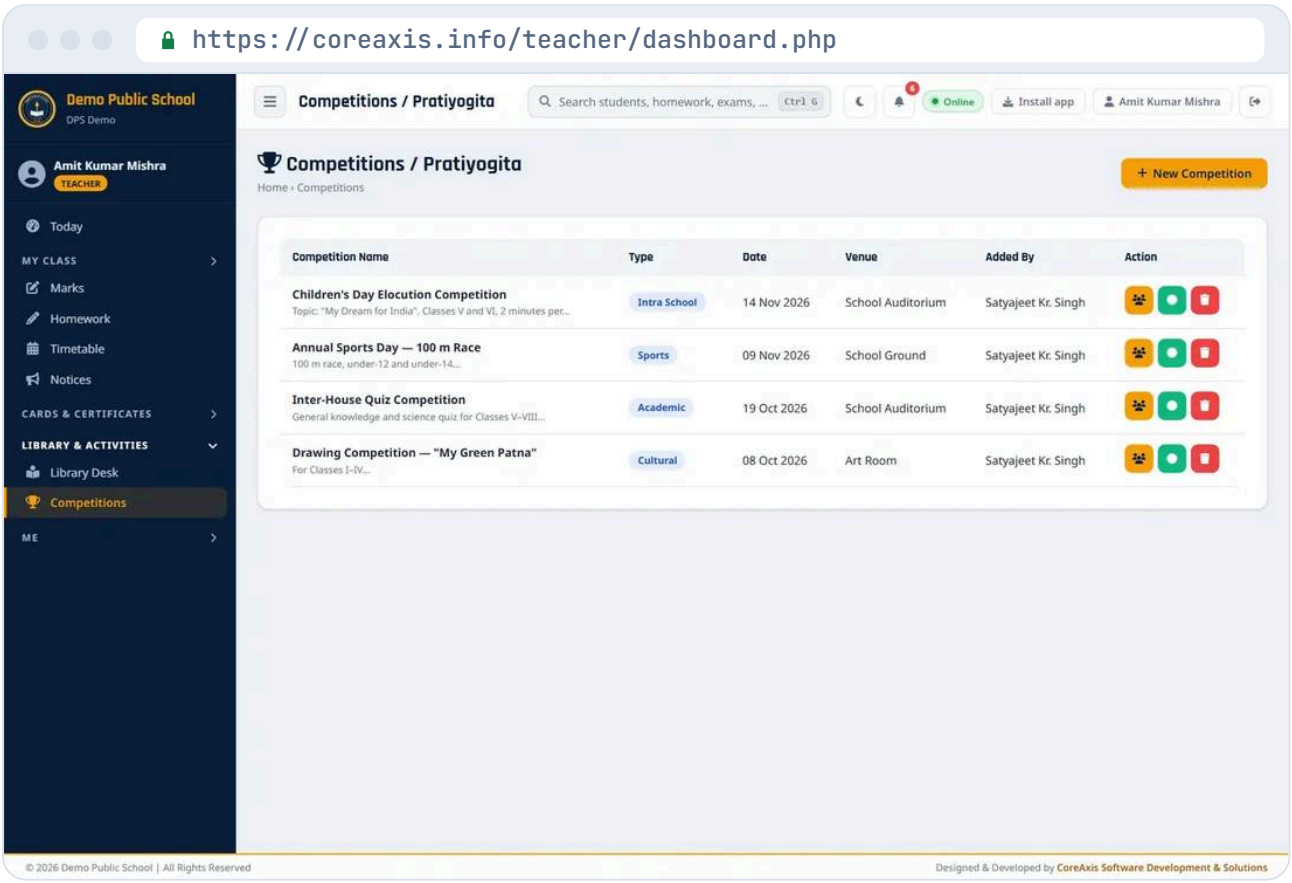
Library Desk and competitions

1. **Library & Activities › Library Desk** shows total copies, available, issued and overdue books. Use **Issue Book** when a student borrows a book and the return button when it comes back.



46 copies, 3 issued, 2 overdue. Full steps are in the Library chapter.

2 **Competitions** lists school competitions (name, type, date, venue). **New Competition** records a new one and its winners.

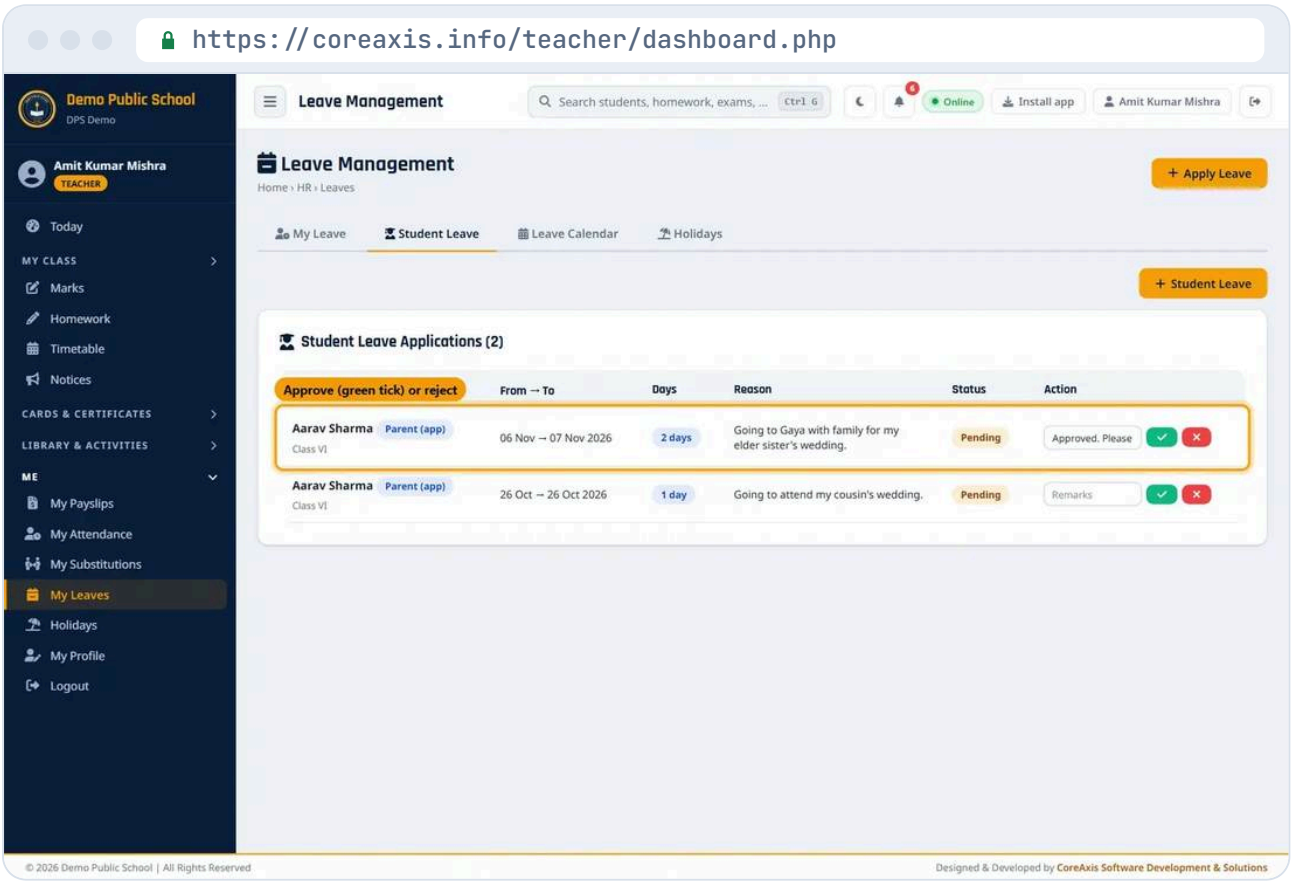


Student leave from parents: approve or reject (example: Aarav Sharma, 6–7 Nov)

Leave requests that parents send from the portal or the app reach the class teacher.

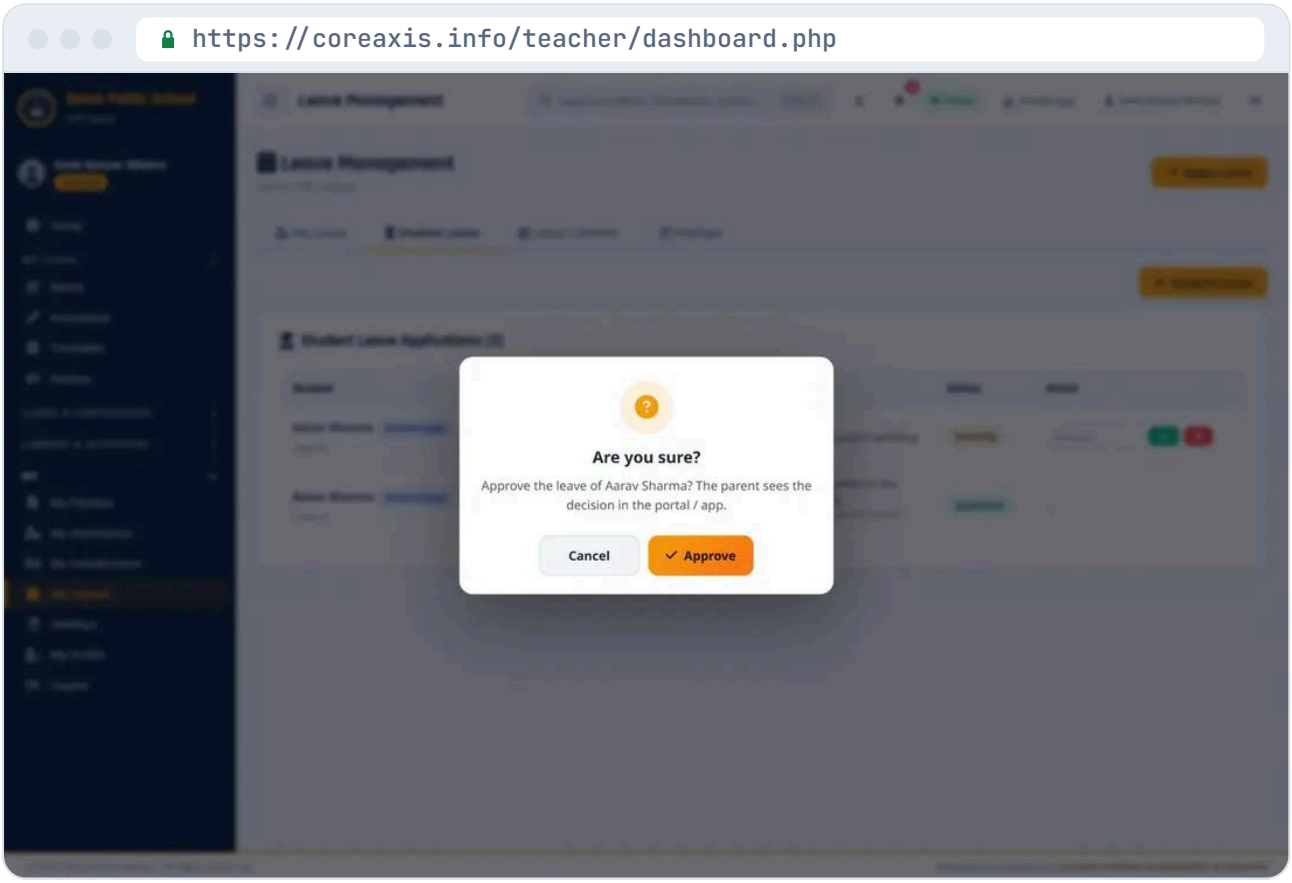
1 Click **Me › My Leaves** and open the **Student Leave** tab.

2 Read the request (student, dates, days, reason). Type a short note in **Remarks** if needed.



Aarav Sharma's parent asked for 06–07 Nov 2026.

3 Click the green tick to approve (or the red cross to reject). The popup asks, for example, "Approve the leave of Aarav Sharma? The parent sees the decision in the portal / app." Click **Approve** (or **Reject**).



The approve popup names the student.

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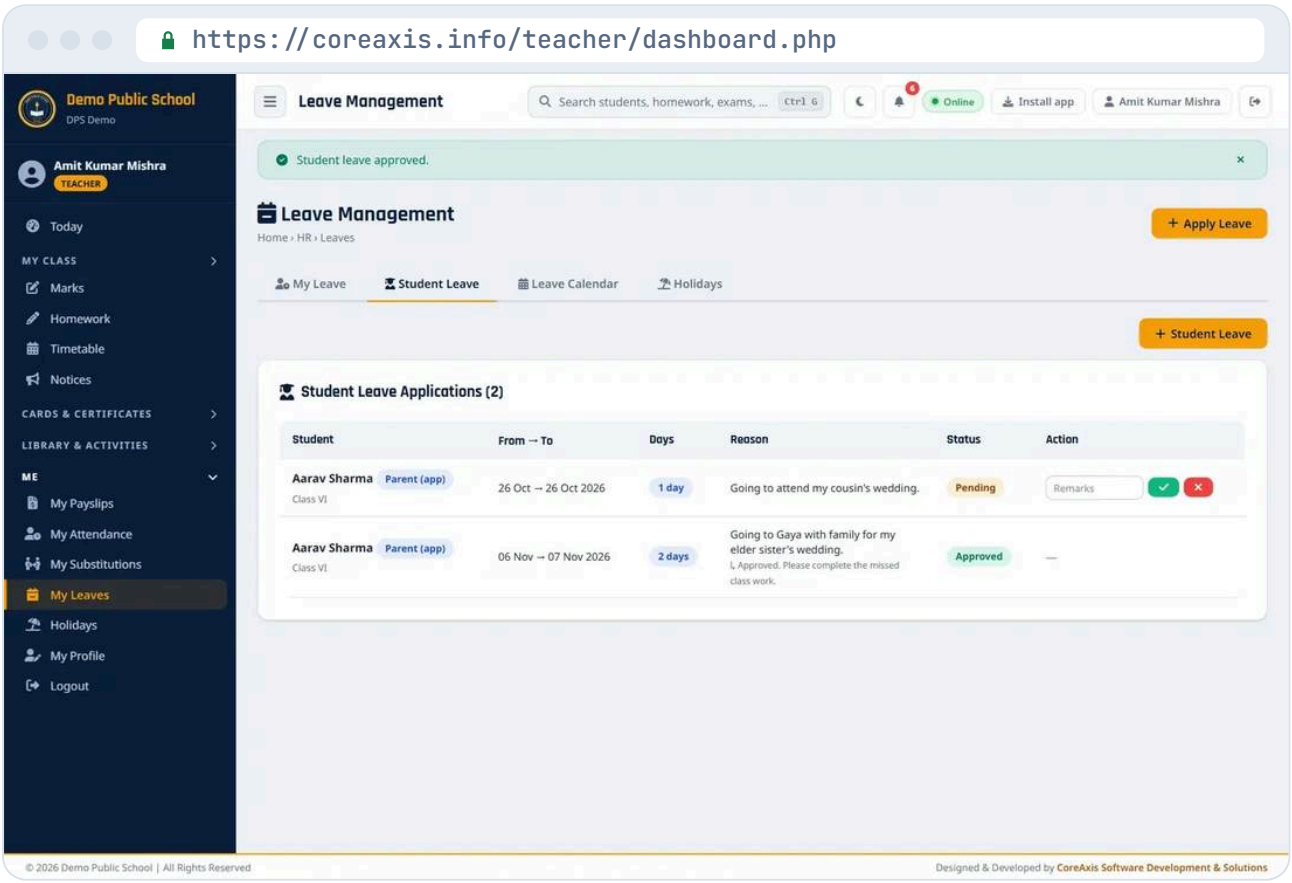
4 The status changes to **Approved** with your remark. The parent sees it in the portal.

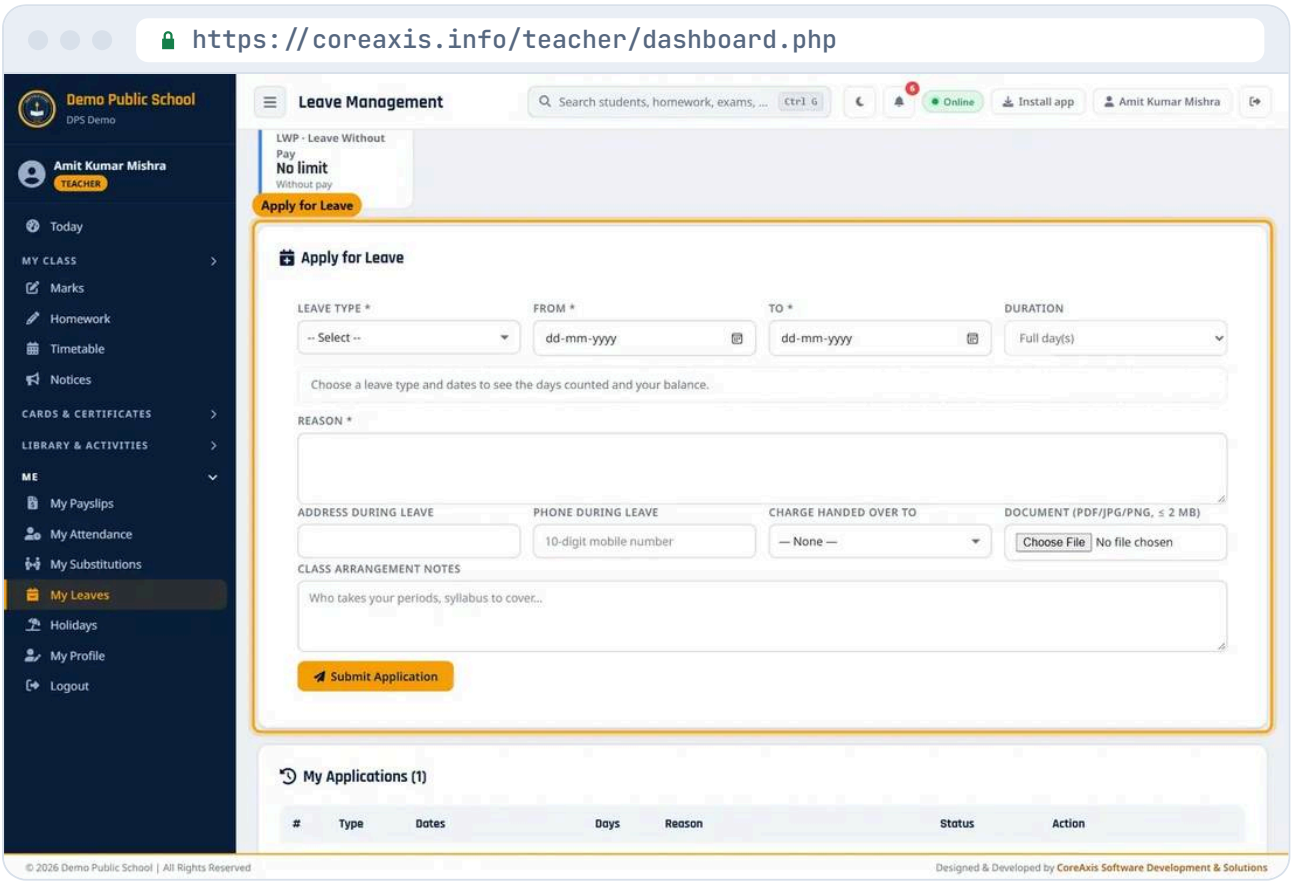


Approved, with the remark shown under the reason.

TIP **+ Student Leave** lets you record leave for a student yourself (for example when the parent sends a written note).

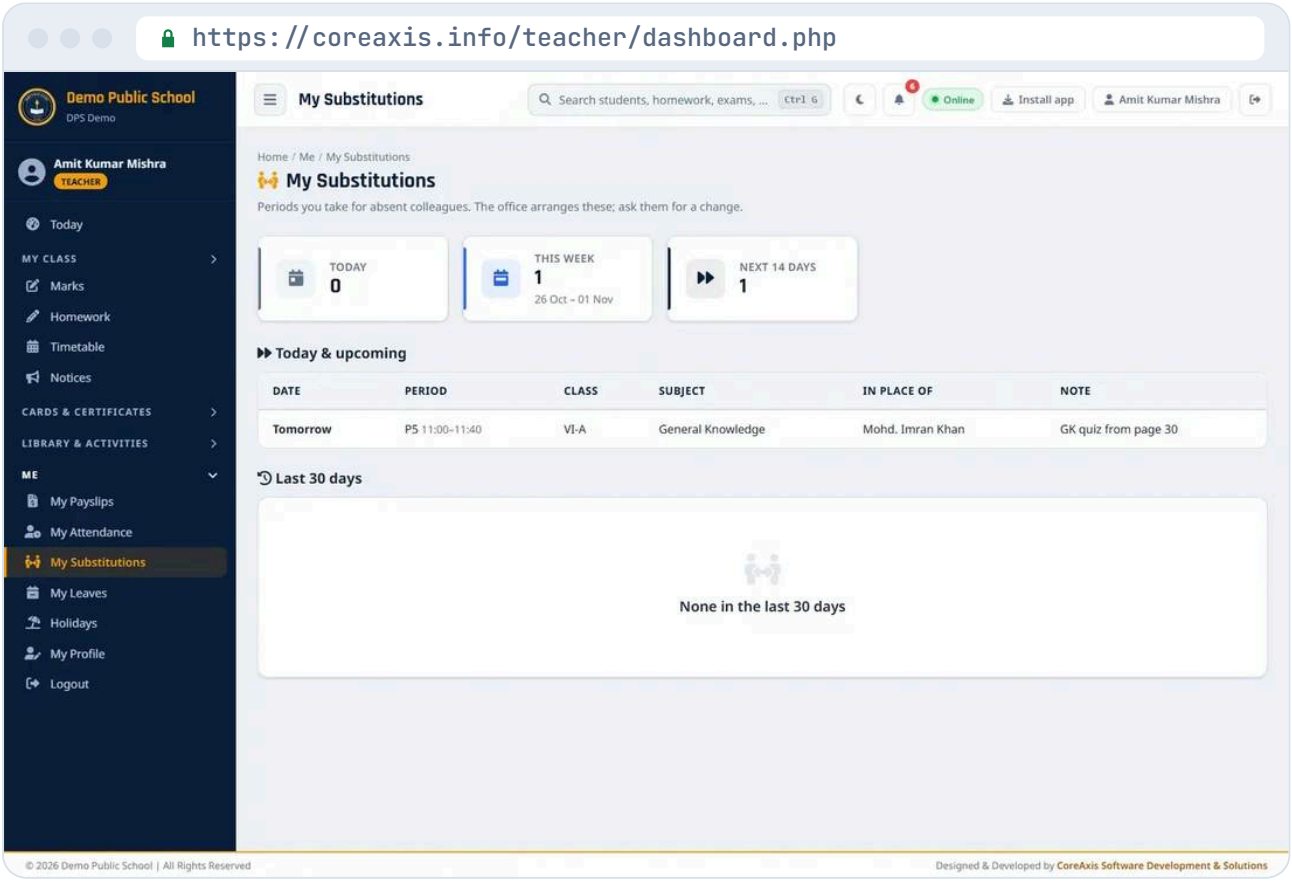
Your own leave, substitutions and payslips

1 **Me › My Leaves**: the top shows your balance for each leave type. Fill **Apply for Leave** (type, from, to, duration, reason, charge handed over to, class arrangement notes) and click **Submit Application**. Your applications and their status are listed below.

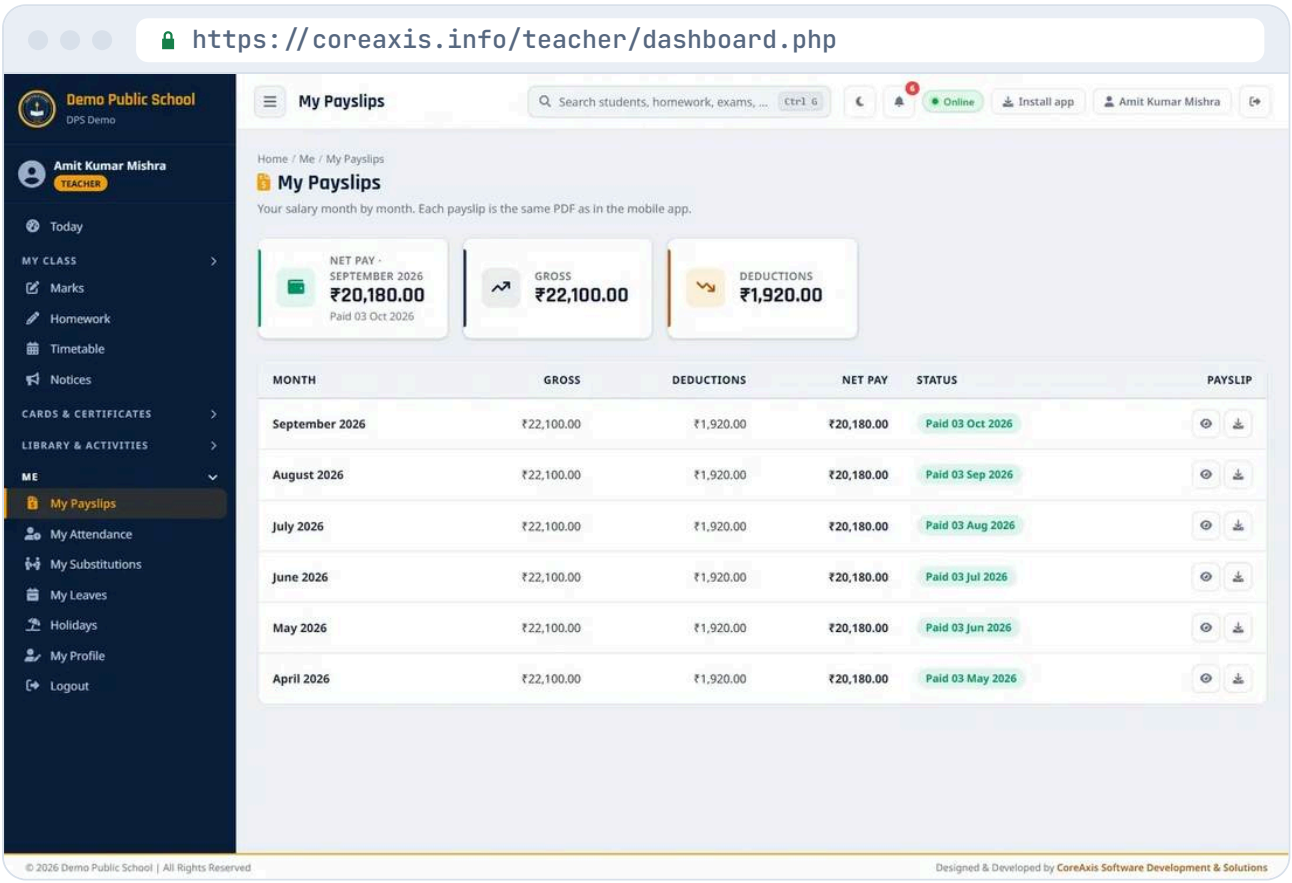


Apply for Leave. See the Leave chapter for approvals and joining reports.

2 **Me › My Substitutions**: periods you take for absent colleagues today, this week and in the next 14 days. The office arranges them.



3 **Me › My Payslips**: view or download your payslip for each month, newest month first.



Daily checklist

Before period 1	Today page: timetable, substitutions, notices.
Period 1	Attendance for your class: Mark all present, change absentees, Save attendance.
After each class	Homework: assign with a submission date.
After a test	Marks: enter and save marks for your subject.
Once a day	My Leaves › Student Leave: approve or reject parents' requests.
Exam time	Admit cards before the exam; report cards after results are published.

Questions

I forgot to mark attendance yesterday. Can I still do it?

Yes. Open Attendance, choose the class and change the date to yesterday, then mark and save. Future dates cannot be chosen.

Why can I not see Class VII in Attendance?

Teachers see only the classes assigned to them. The Principal / Administrator assigns classes on the staff record.

Students cannot see the marks I entered.

Marks show in the portal only after the exam is published by the Principal / Administrator.

Where do I enter Half-Yearly marks?

Under Marks. The Half-Yearly Examination is set for All Classes; click Marks in its row and your class is already chosen in the Class box. Enter the marks and save. Report Cards then uses it as Term I.

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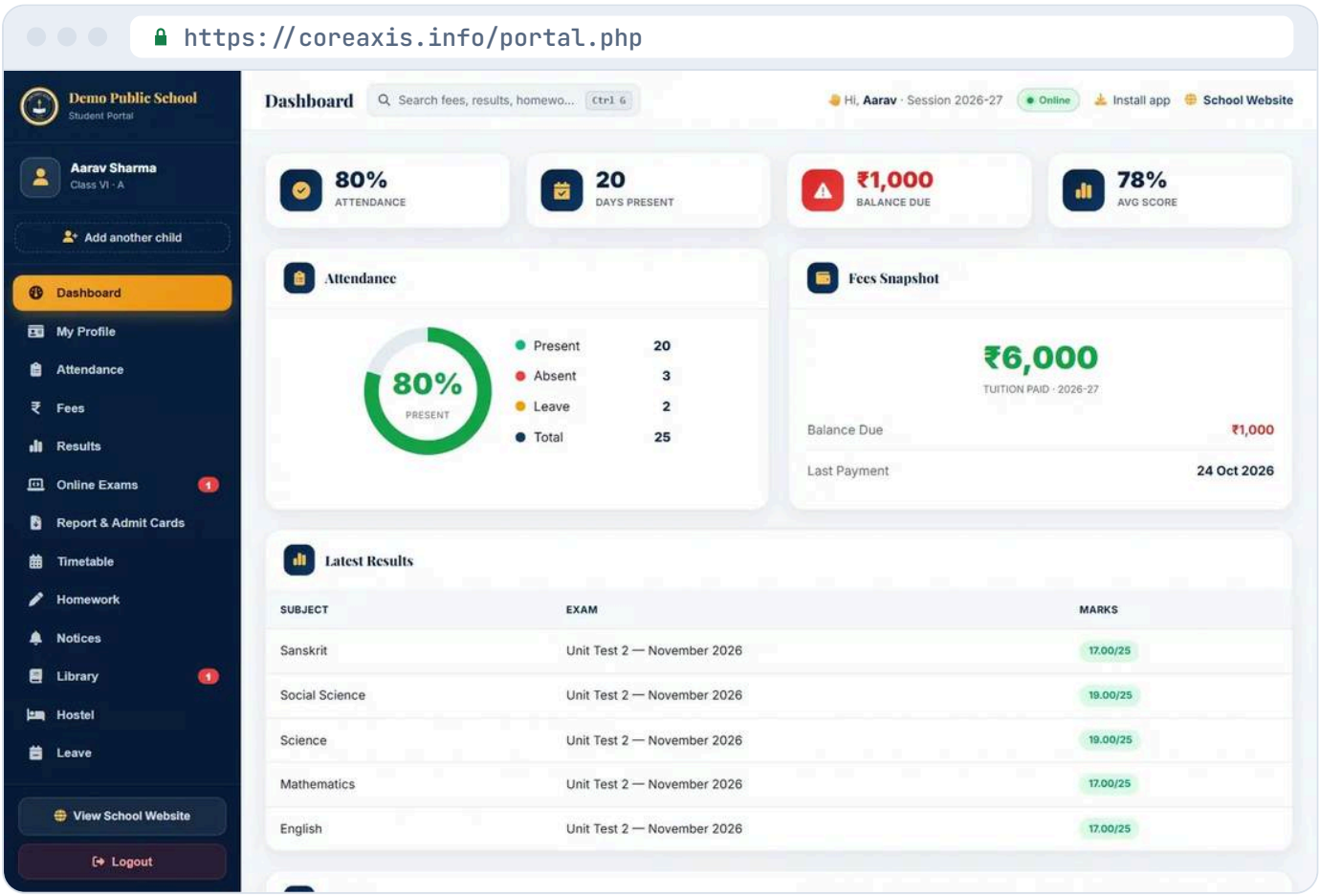
STUDENT & PARENT PORTAL · CHAPTER 56

Student / Parent Portal

Student Parent MENU School website › Student Portal (or Staff Login page › Student Portal)

The Student / Parent Portal is where a parent or student sees everything the school records about one child. There is no password: the child's own Admission Number and Date of Birth are the sign-in. A parent with more than one child in the school can add each child and switch between them. The worked example is Aarav Sharma, Class VI-A, admission number DEMO20260001. Everything in the portal is also in the CoreAxis mobile app.



Student / Parent Portal — Demo Public School

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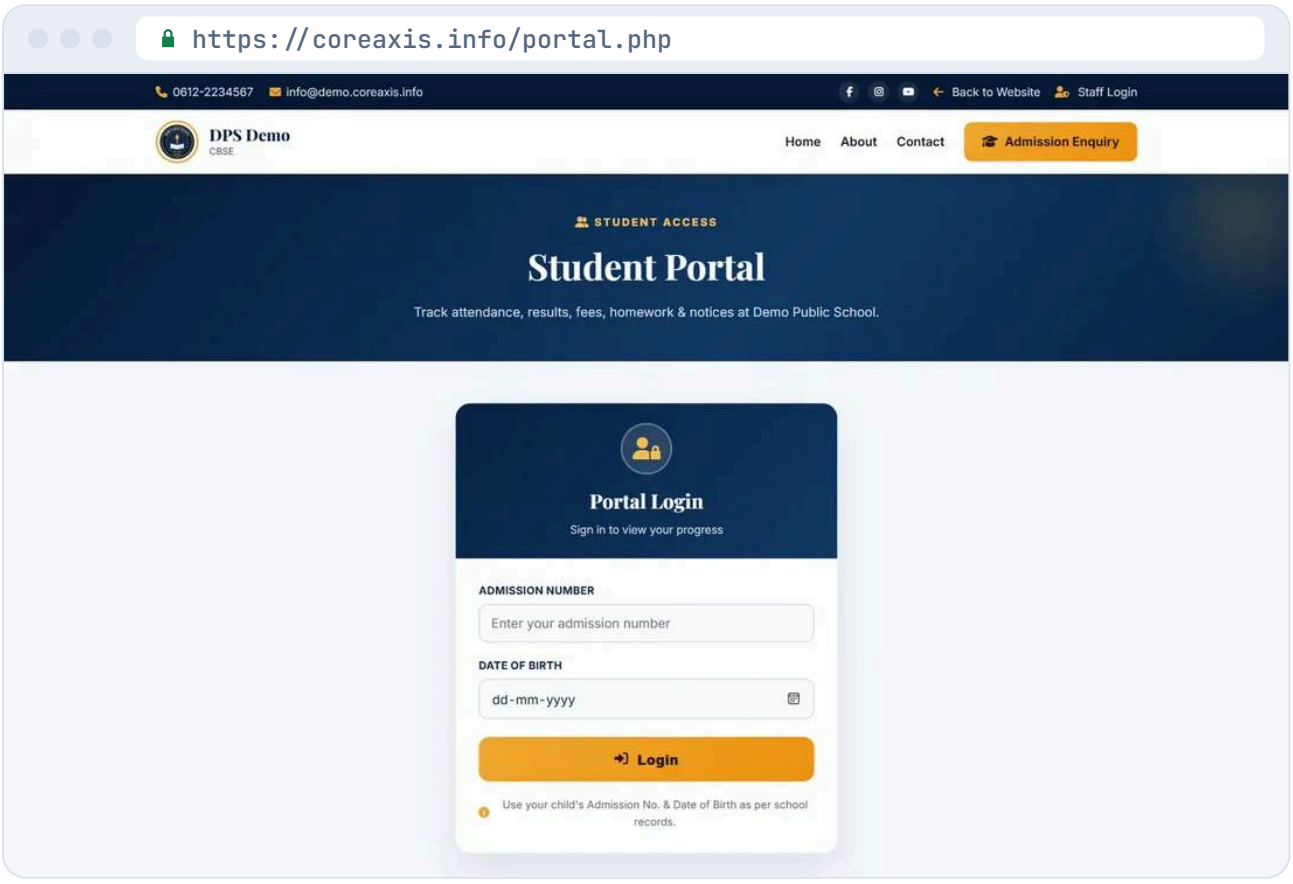
Sign in (example: Aarav Sharma, DEMO20260001)

1. Open the school website and click **Student Portal**, or open https://coreaxis.info/portal.php and choose the school.



Portal Login of Demo Public School.

2. Type the child's **Admission Number** exactly as on the fee receipt or ID card (DEMO20260001).

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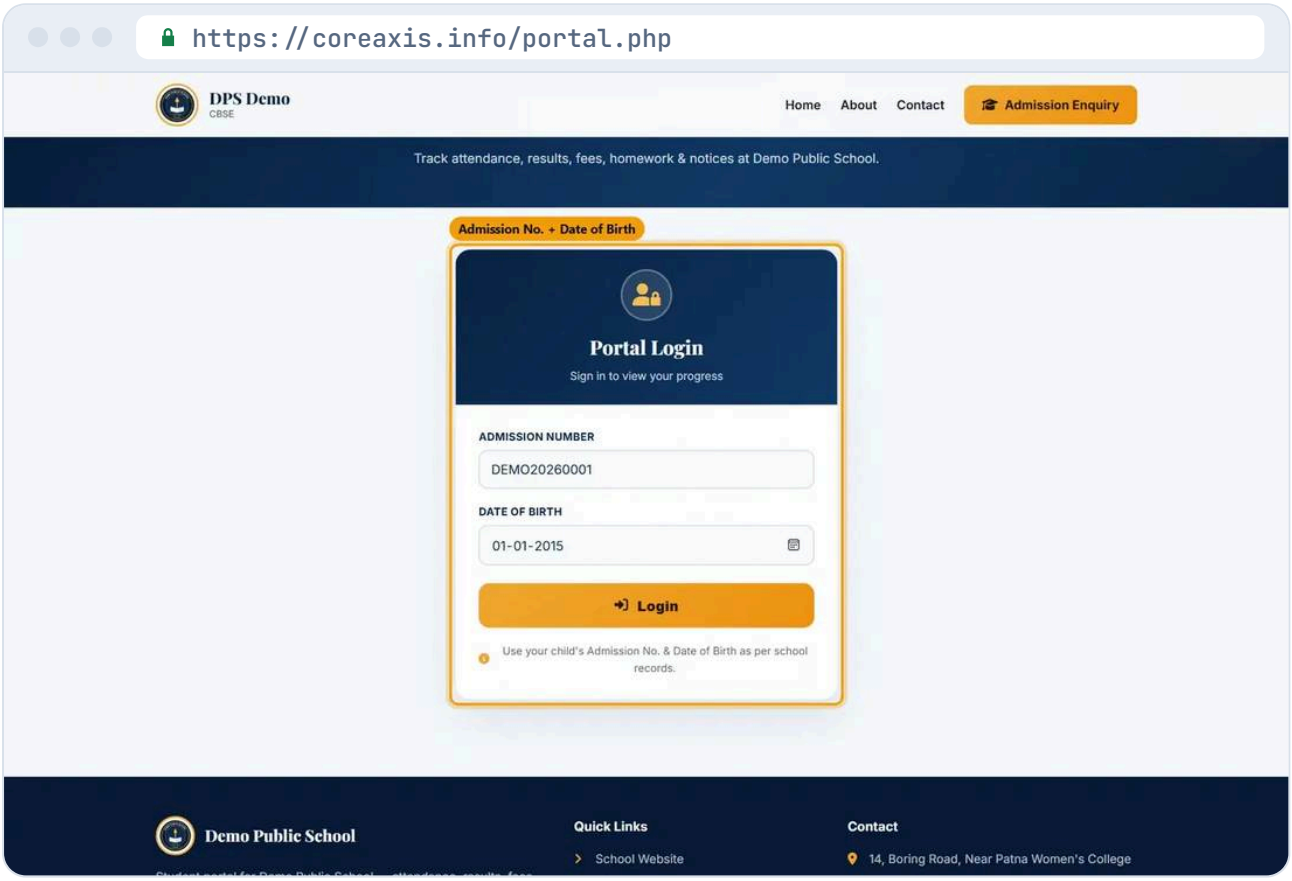
3 Enter the **Date of Birth** as per school records (01-01-2015).



Admission number and date of birth filled in.

4 Click **Login**. The portal opens on the **Dashboard**.

TIP After 6 wrong tries for one admission number (or 20 from one network) the portal waits 15 minutes before allowing another try.

TIP The portal signs you out after 30 minutes without use. Sign in again with the same details.

TIP If the date of birth is wrong in the school records, the parent must ask the school office to correct it.

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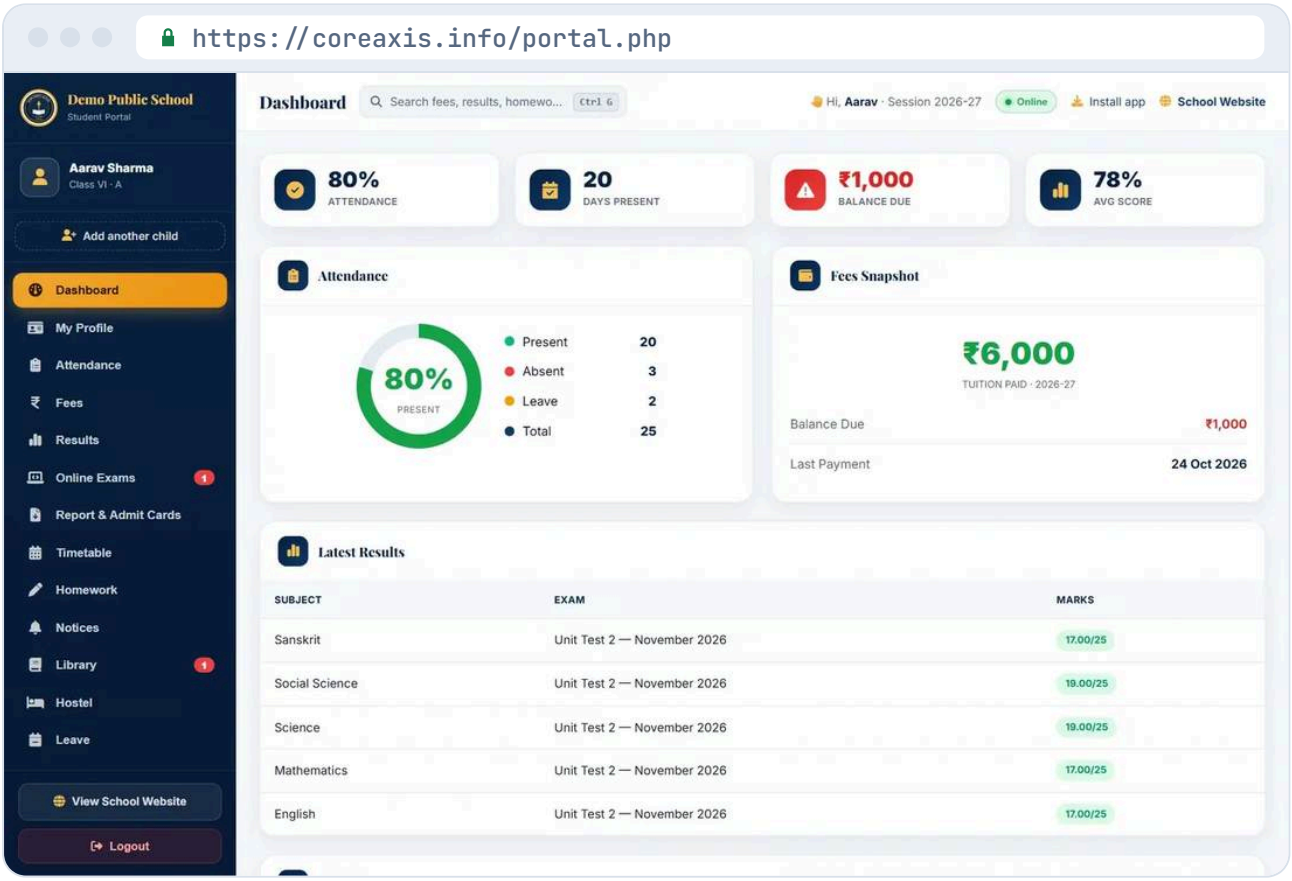
Dashboard

1. Use the left menu to move between sections. Each section opens in the same page; the browser Back button returns to the previous section. On a phone, use the bottom bar (Home, Fees, Results, Attendance, More).



Aarav Sharma's dashboard: 80% attendance, ₹1,000 due, 84% average score.

Attendance (card)	Attendance percentage for the session.
Days Present	Number of days marked present.
Balance Due	Fee still to pay for the months billed so far.
Avg Score	Average percentage across published exam results.
Attendance (panel)	Ring chart with Present, Absent, Leave and Total days.
Fees Snapshot	Tuition paid this session, balance due and the date of the last payment.
Latest Results	Subject, exam and marks of the latest published exam.

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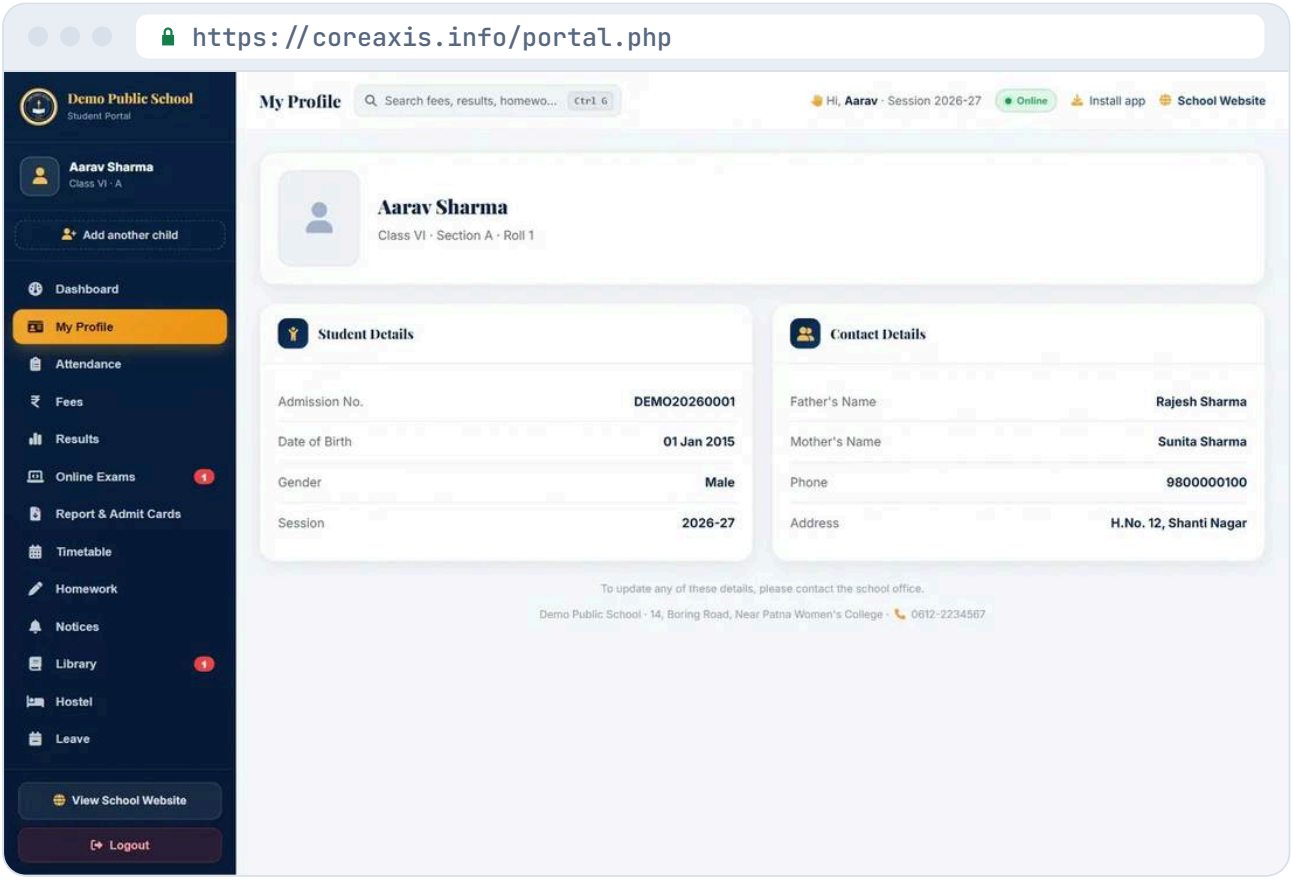
Latest Notice	The newest notice for students or parents.
Top bar	Search (Ctrl + G) searches this child's own fees, results, homework and notices. Install app adds the portal to the phone. School Website opens the school's public site.
Red number on a menu item	Something needs attention: an online test to take, a new admit card, or an overdue library book.

My Profile and Attendance

1. Click **My Profile** to see the student details (admission number, date of birth, gender, session) and contact details (father's and mother's name, phone, address).



Profile details can be changed only by the school office.

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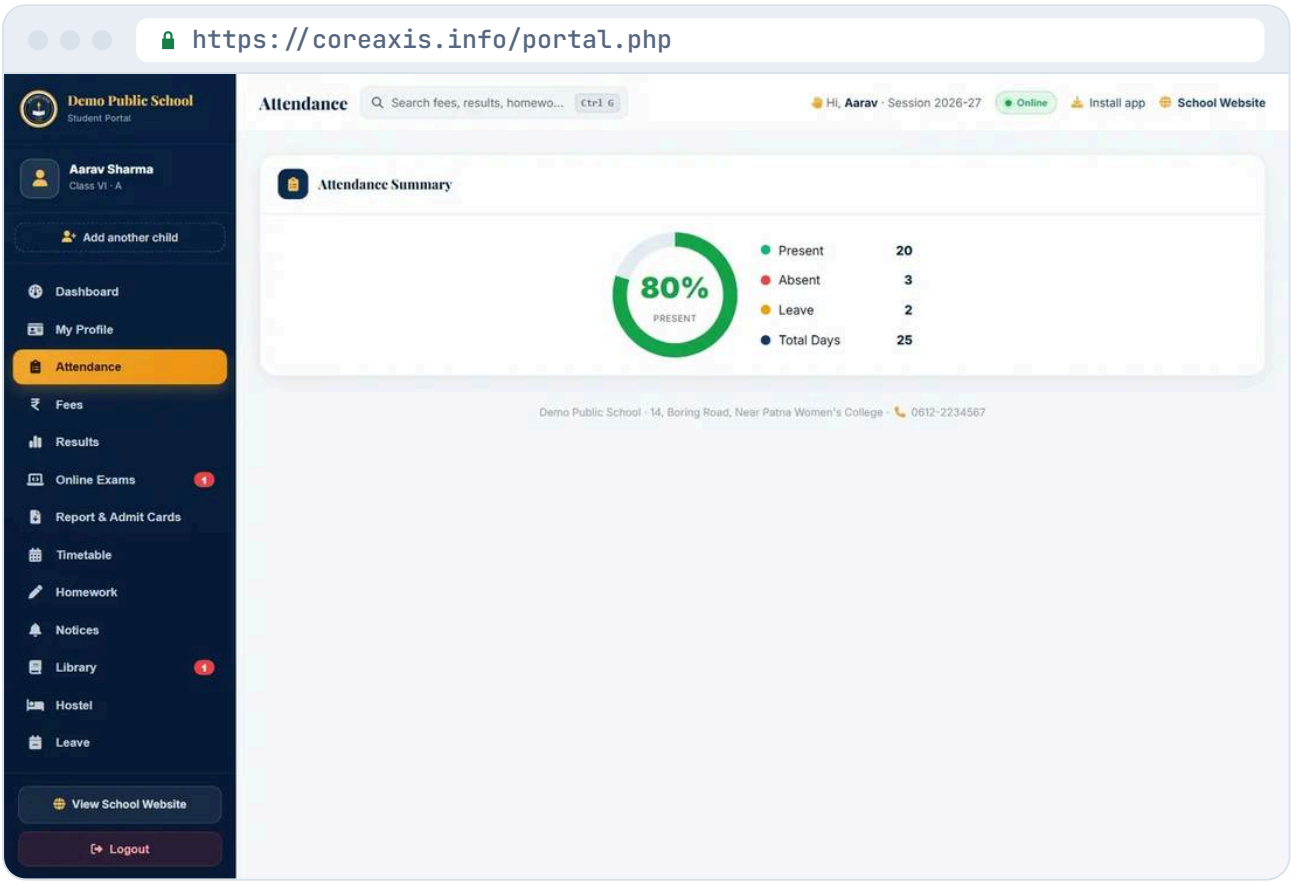
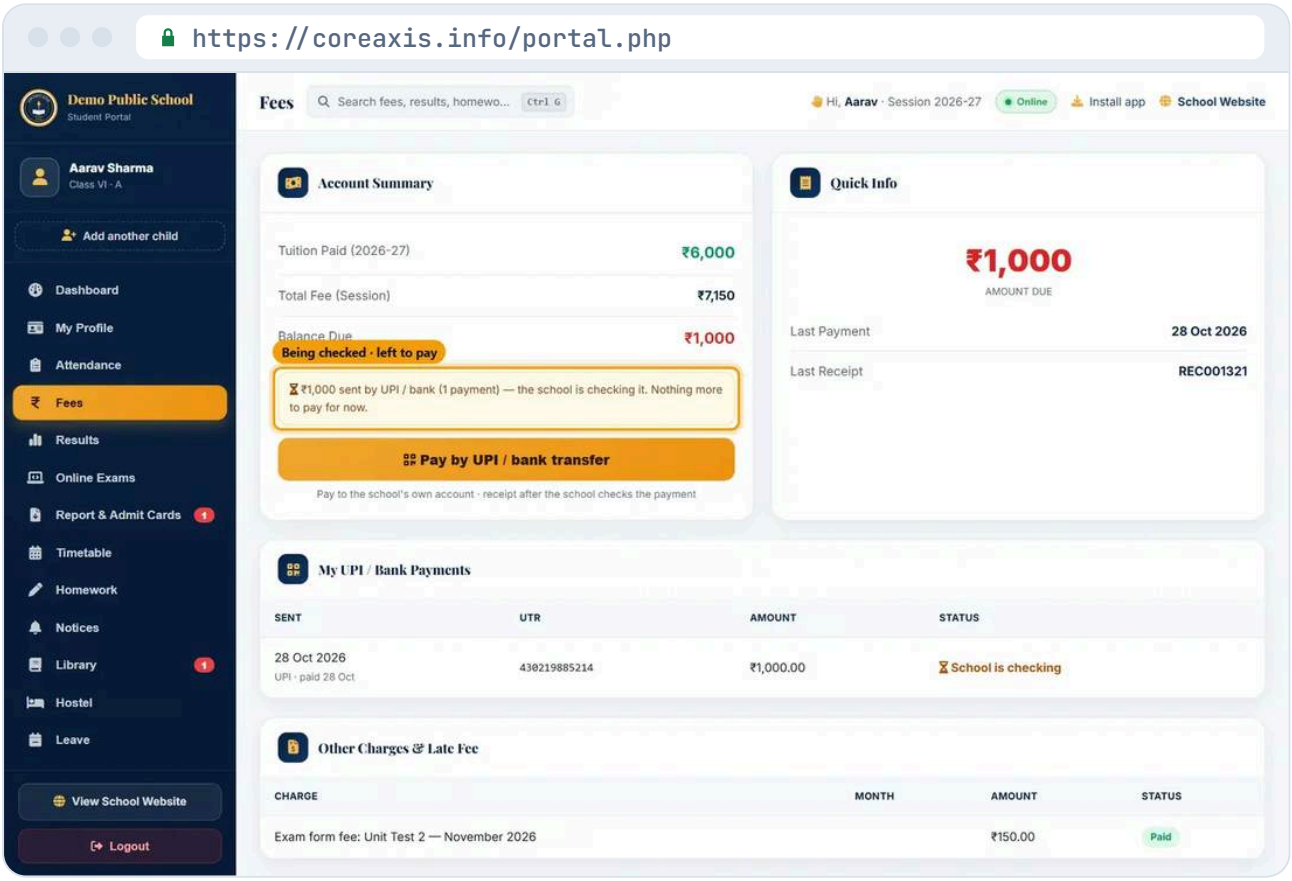
2 Click **Attendance** for the session summary: present, absent, leave and total days.



Aarav Sharma: 20 present, 3 absent, 2 leave of 25 days (80%).

Fees: dues, payment history and receipts

1 Click **Fees**. **Account Summary** shows Tuition Paid (2026-27), Total Fee (Session) and Balance Due; **Quick Info** shows the amount due, last payment date and last receipt number.



₹6,000 tuition paid; ₹1,000 due. The yellow box shows the ₹1,000 UPI payment the school is still checking: nothing more to pay for now.

2 If you have sent a UPI / bank payment that the school has not checked yet, a yellow box under Balance Due shows the amount being checked and what is **Left to pay** (or "Nothing more to pay for now" when it covers the dues).

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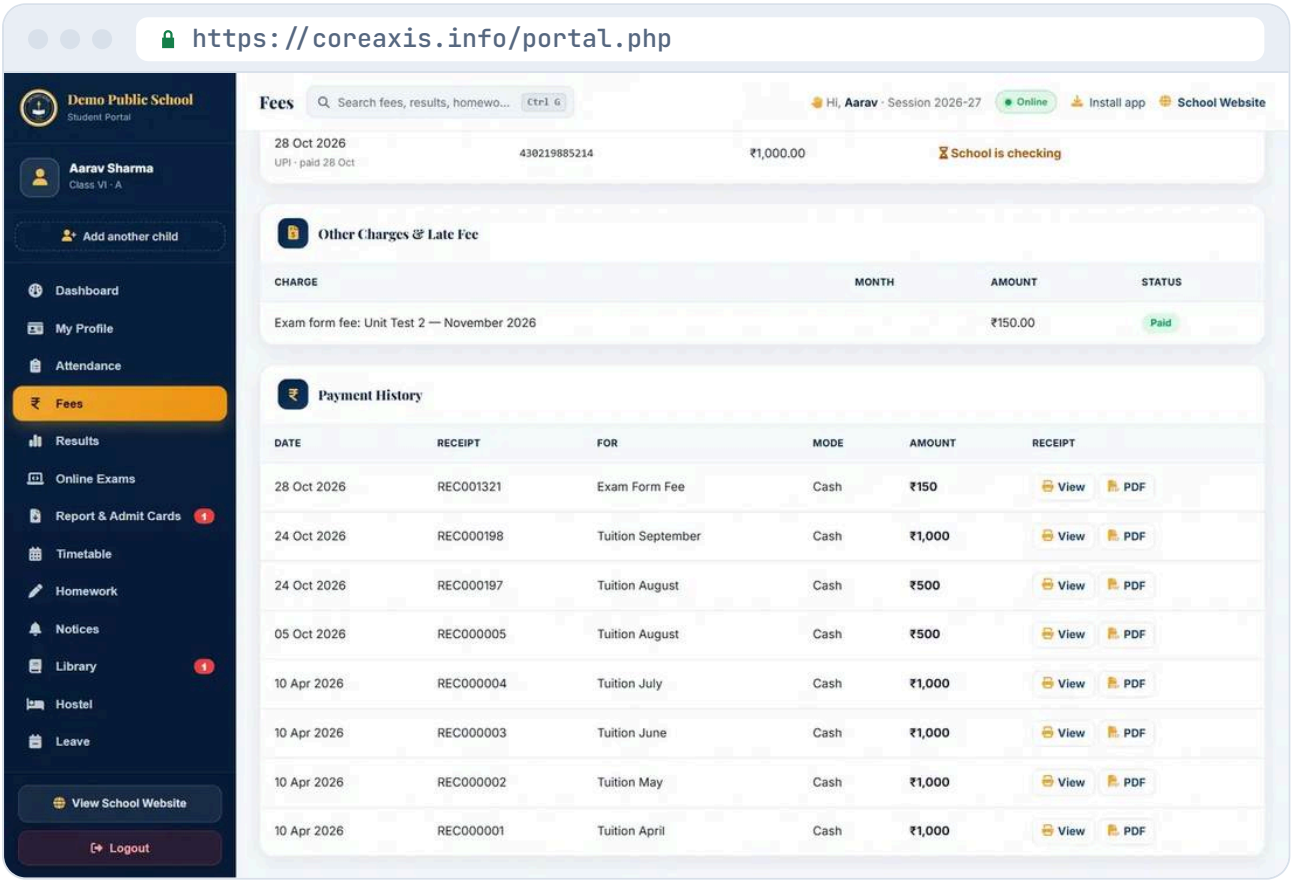
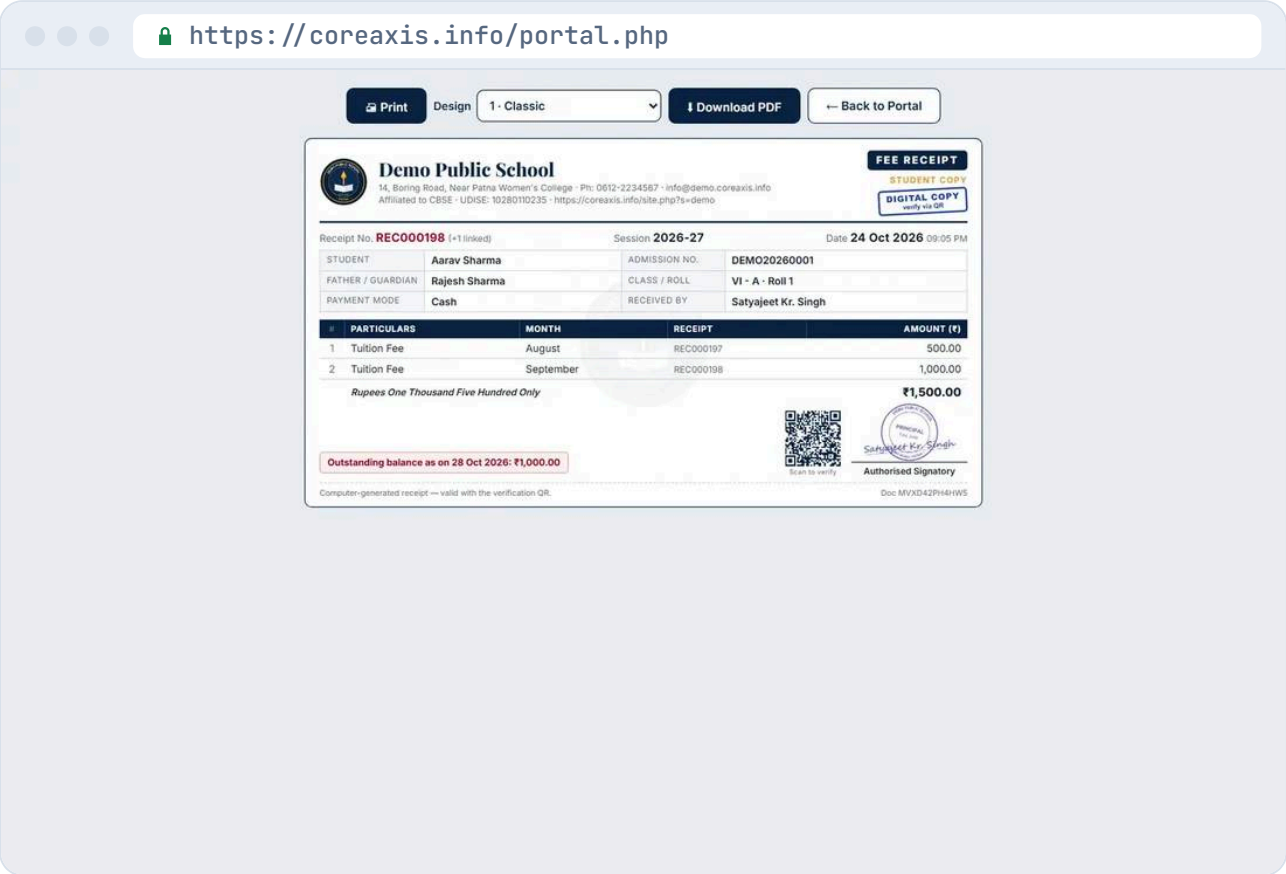
3 Scroll to **Payment History**. Each row shows date, receipt number, what it was for, mode and amount. A receipt that covers several months shows the range, for example **Tuition August – October**.



Aarav Sharma's receipts from April to October 2026, including the Exam Form Fee.

4 Click **View** to open a receipt. Use **Print**, choose a **Design**, or click **Download PDF**. **Back to Portal** returns to Fees.



Receipt REC000198 (linked with REC000197): ₹1,500, marked DIGITAL COPY with a verification QR.

5 Click **PDF** on a row to download the receipt as a PDF file straight away.

TIP Receipts downloaded from the portal are marked DIGITAL COPY. Anyone can scan the QR code to check that the receipt is genuine.

Pay by UPI or bank transfer and send the UTR (example: ₹1,000, UTR 430219885214)

The parent pays straight into the school's own UPI ID or bank account, then sends the transaction reference (UTR) and, if possible, a screenshot. The office checks the bank statement and makes the receipt. Pay online with card or net banking appears instead, or as well, when the school has turned on online payment.

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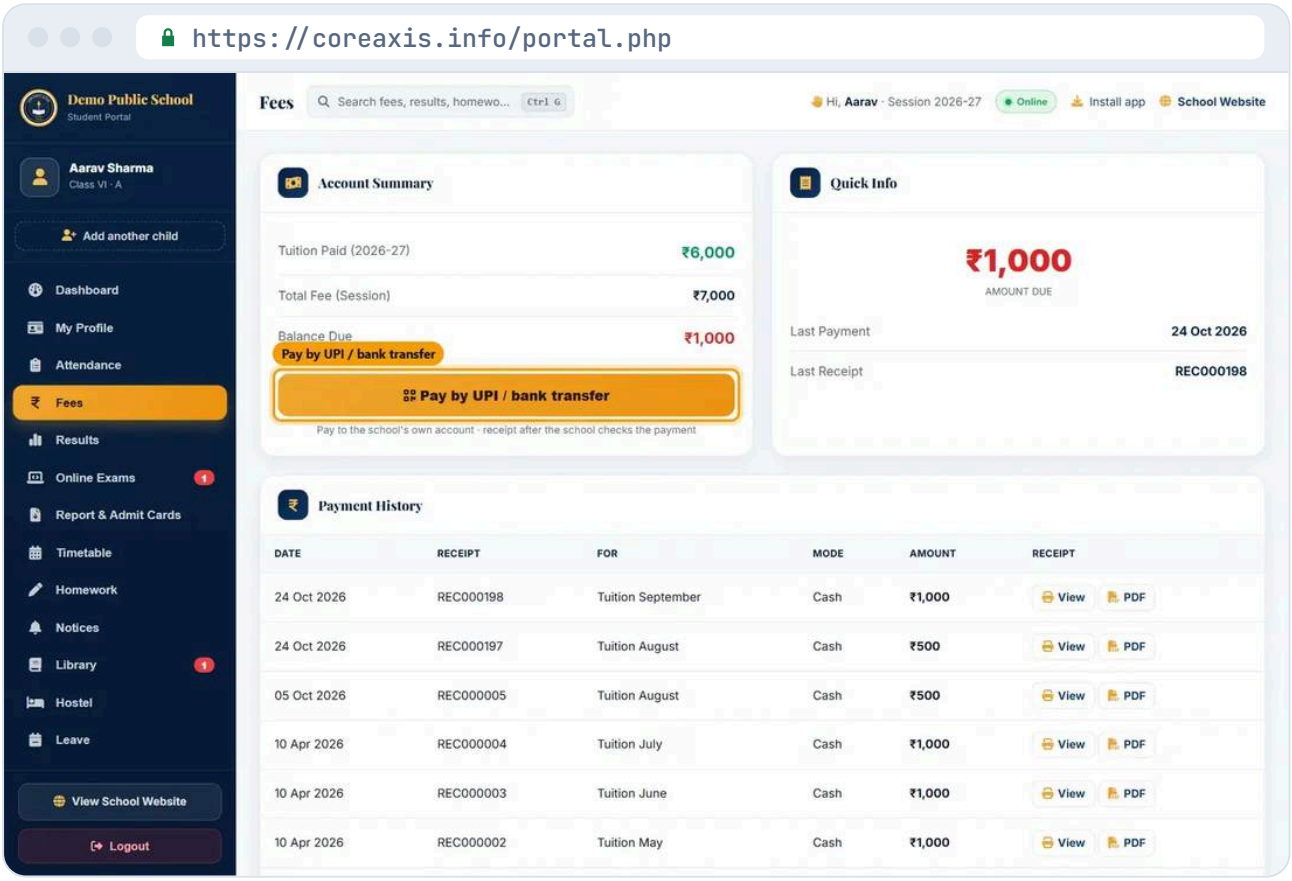
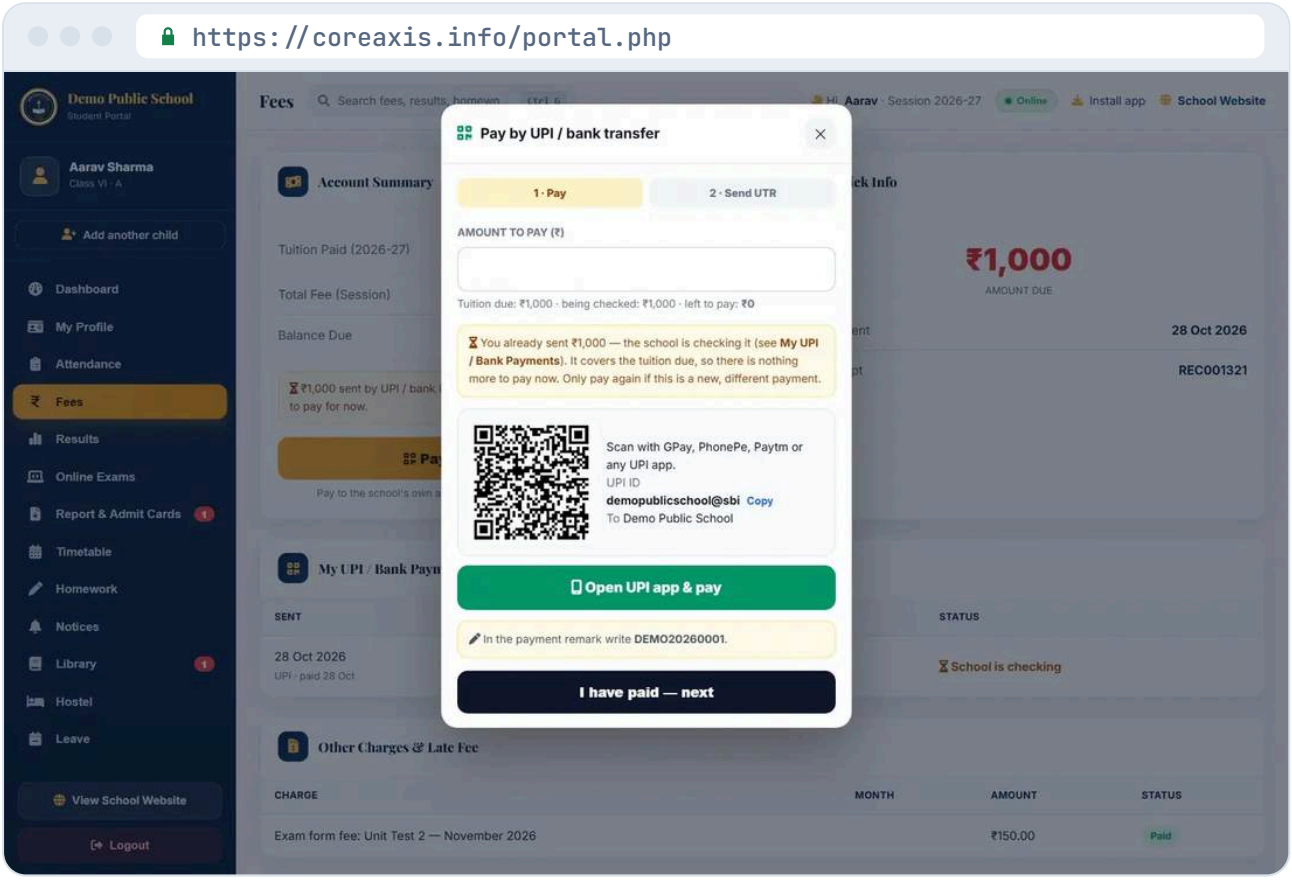
1 On **Fees**, click **Pay by UPI / bank transfer**.



The button shows only when there is tuition due.

2 Step **1 · Pay**: check **Amount to pay (₹)**. It starts at what is left to pay: the tuition due minus any UPI / bank payment the school is still checking. You may lower it for a part payment. The QR code, the school's **UPI ID** (demopublicschool@sbi) with a **Copy** button, and the payee name are shown.



Aarav's ₹1,000 claim is still being checked, so left to pay is ₹0 and a note warns against paying the same dues twice.

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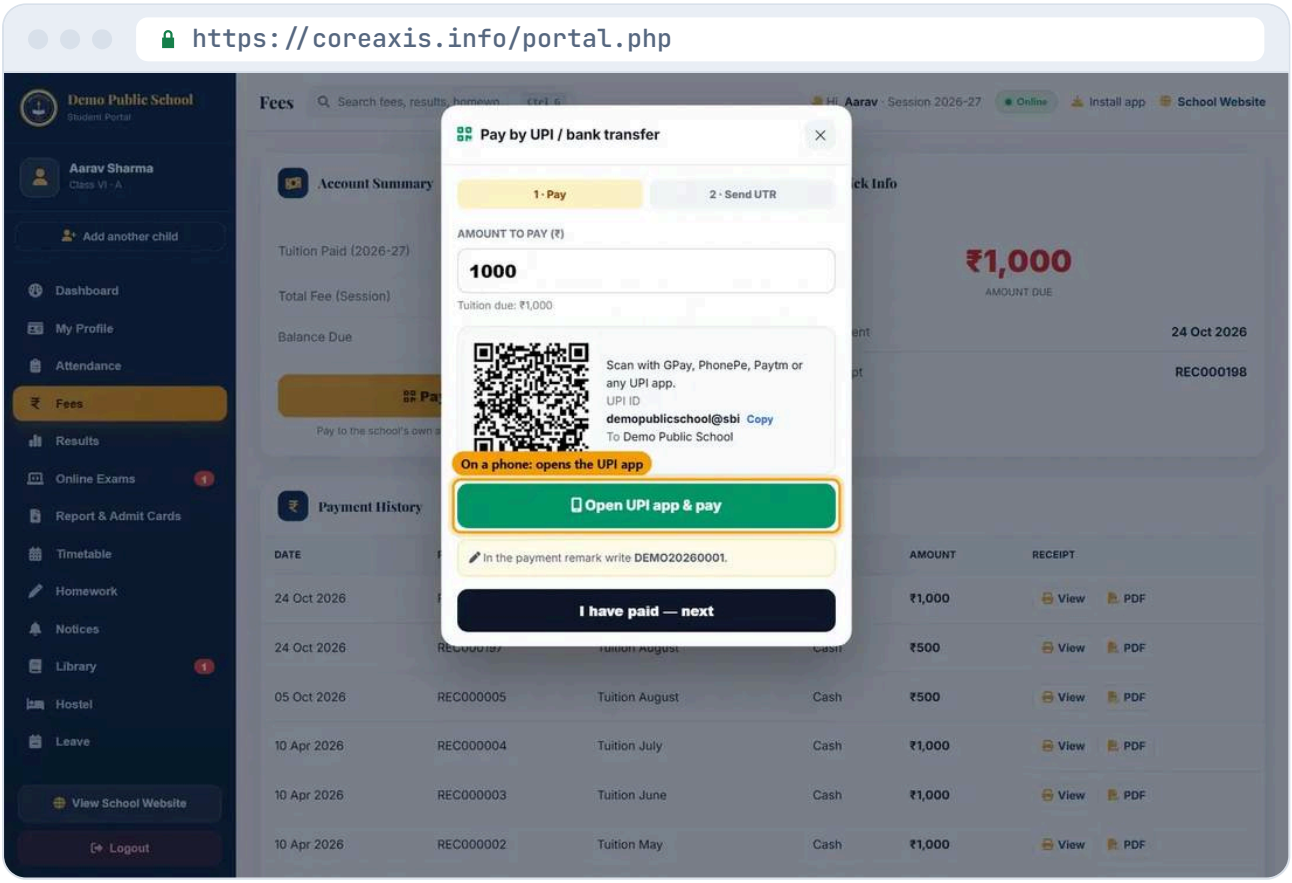
3 On a phone, tap **Open UPI app & pay**. The UPI app opens with the school, amount and remark filled in. On a computer, scan the QR code with the phone instead.



Open UPI app & pay works on phones that have a UPI app.

4 In the payment remark write the admission number (DEMO20260001). If the school has given bank details, **Bank transfer (NEFT / IMPS)** shows the account name, number and IFSC to use instead.

5 After paying, note the UTR / UPI reference number in the UPI app and click **I have paid — next**.

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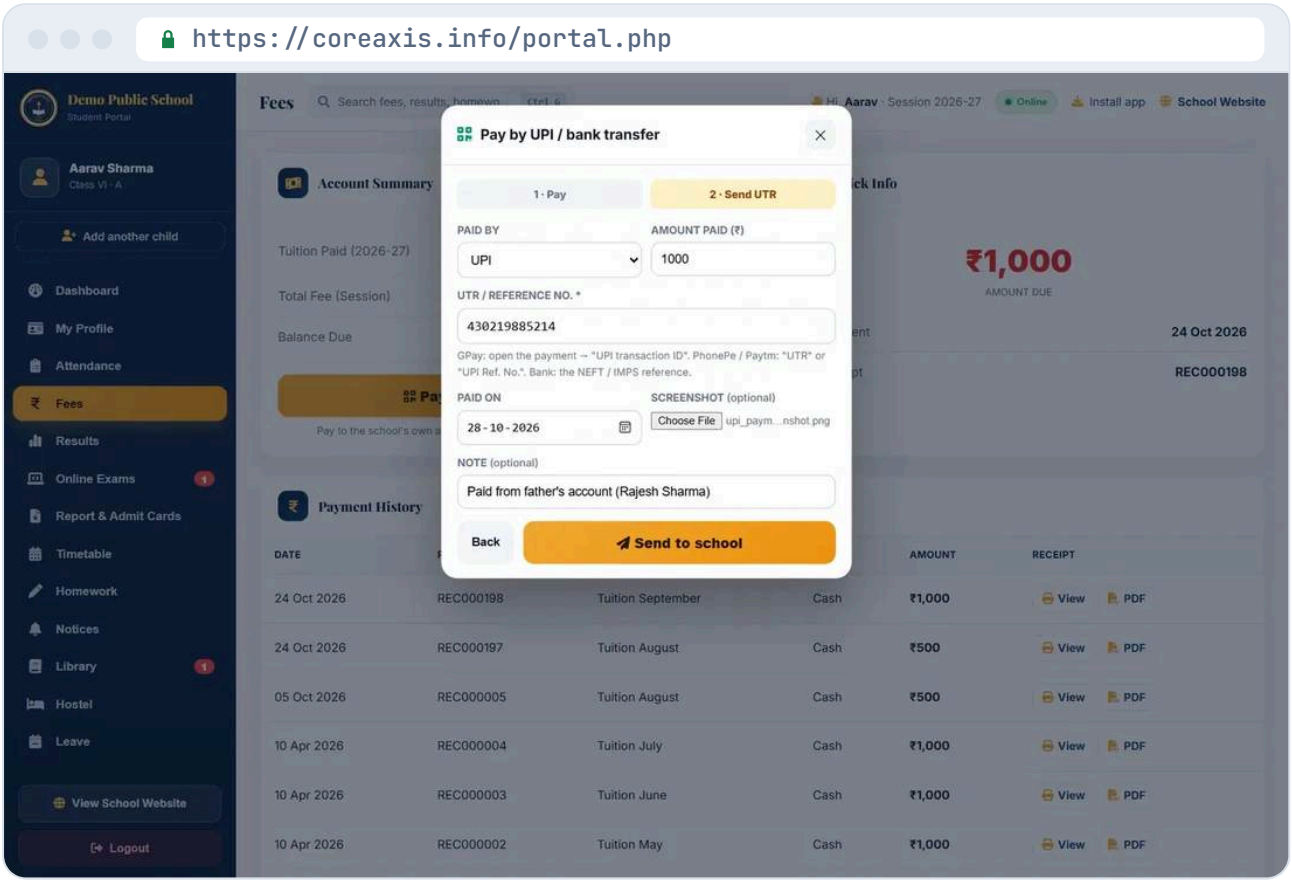
6 Step **2 · Send UTR**: choose **Paid by** (UPI or Bank transfer), check **Amount paid (₹)**, type the 12-digit **UTR / Reference No.**, set **Paid on**, attach the payment **Screenshot** (optional) and add a **Note** (optional).



UTR 430219885214 for ₹1,000, with the payment screenshot attached.

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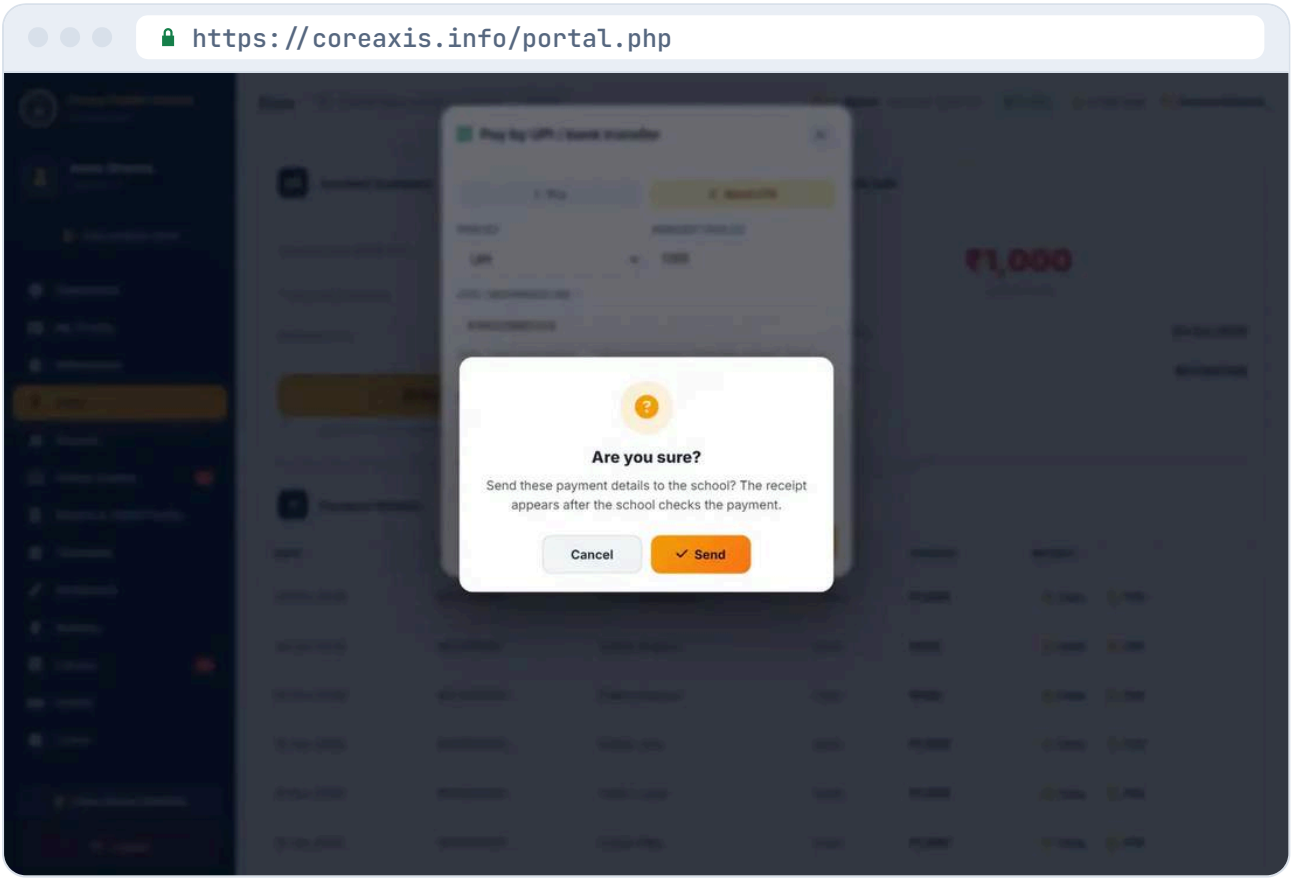
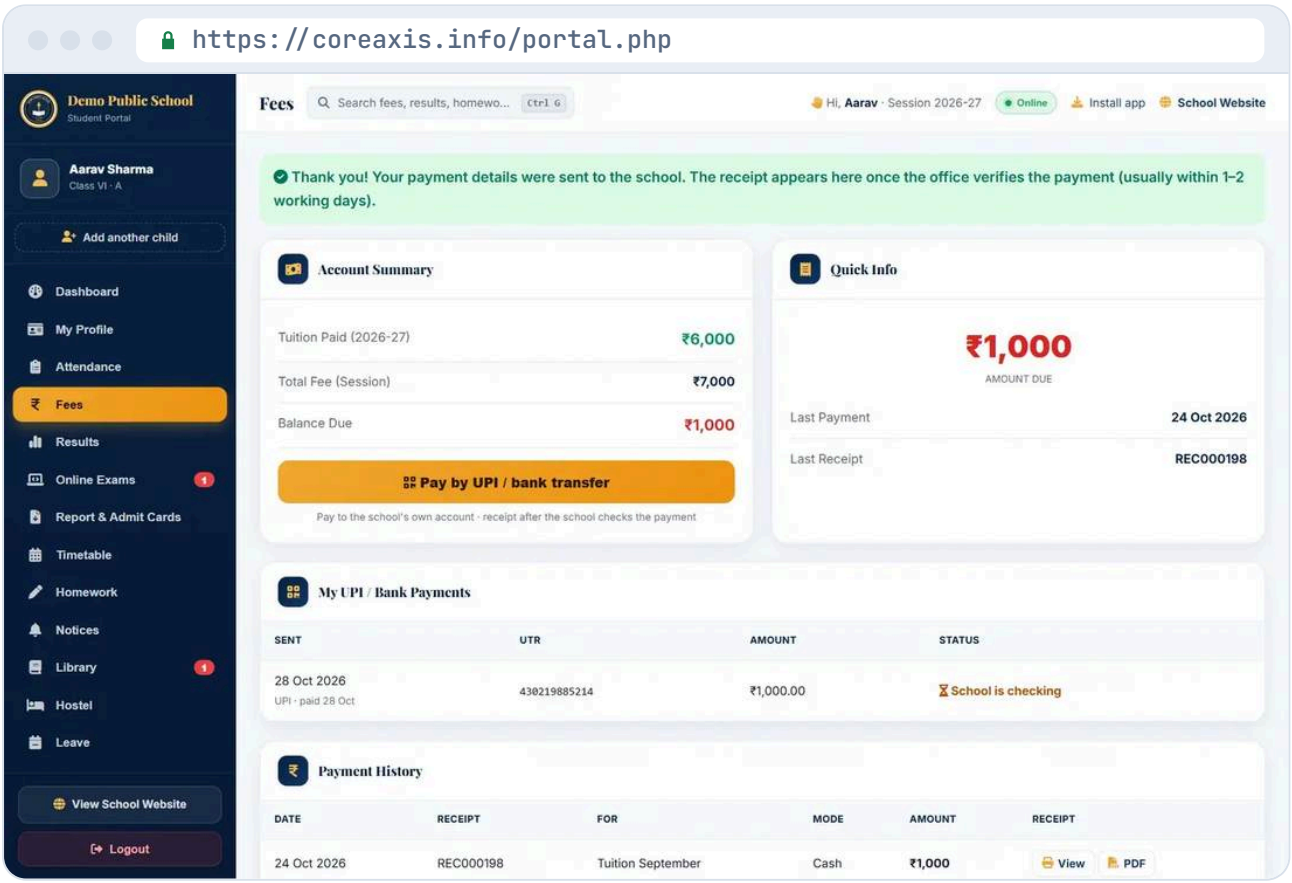
7 Click **Send to school**, then **Send** in the popup.



The receipt is made only after the school checks the payment.

8 A green message thanks you and a new box **My UPI / Bank Payments** shows the claim with status **School is checking**.



The claim waits for the office; the balance changes after the receipt is made.

TIP Where to find the UTR: GPay — open the payment, "UPI transaction ID"; PhonePe / Paytm — "UTR" or "UPI Ref. No."; bank — the NEFT / IMPS reference.

TIP Do not send the same payment twice. While a claim is being checked, the portal shows it on Fees and in step 1, and offers only what is left to pay.

TIP The office verifies claims on UPI / Bank Claims, usually within 1–2 working days.

TIP Pay online (card / net banking), when the school has it switched on, also offers only what is left after the claims being checked.

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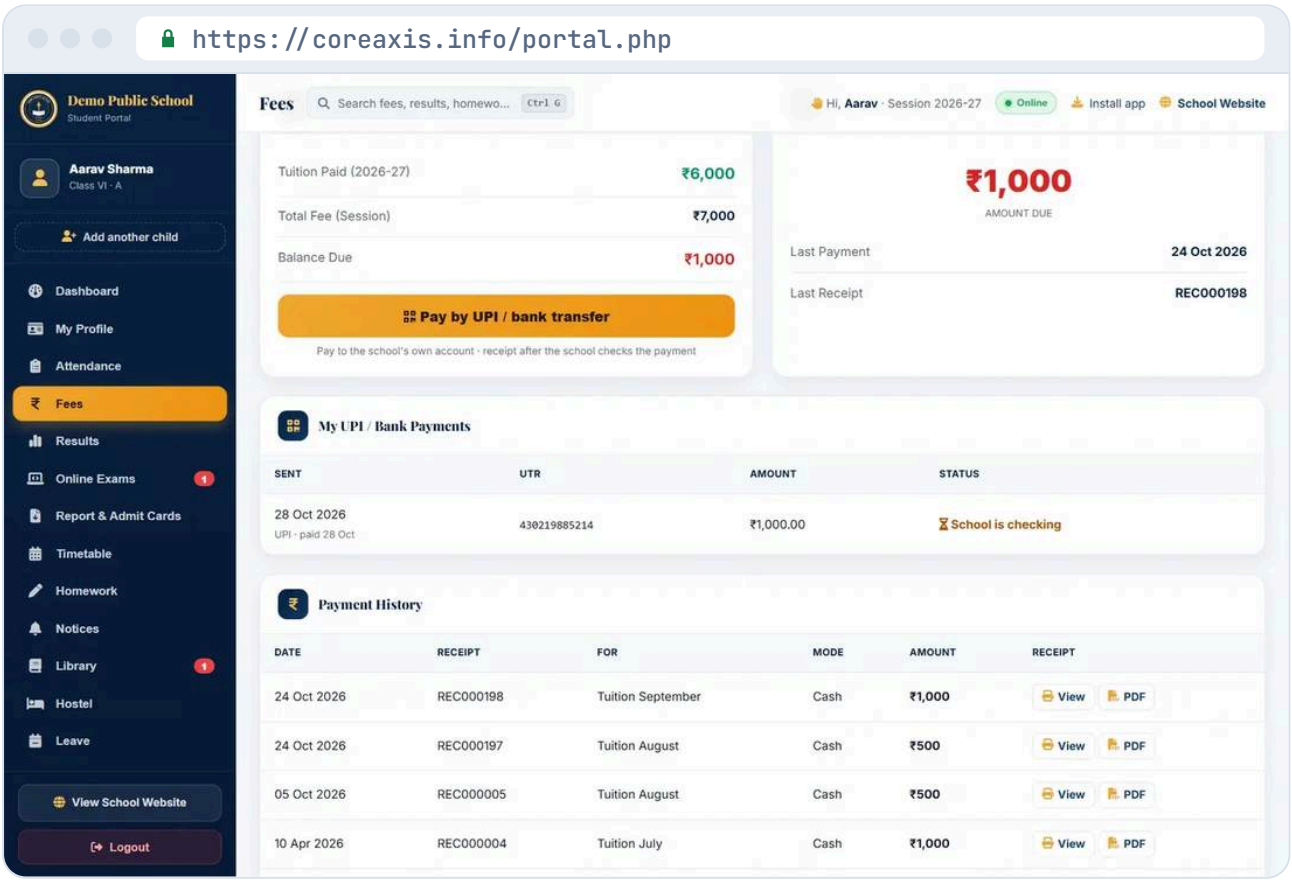
My UPI / Bank Payments: status of what you sent

1 On **Fees**, the **My UPI / Bank Payments** box lists the last payments you reported.



Sent	The date you sent the details, and the mode and date of payment (UPI · paid 28 Oct).
UTR	The reference number you typed.
Amount	The amount you said you paid.
School is checking	The office has not yet matched it with the bank statement.
Verified	The money was found; the receipt now appears in Payment History.
Rejected	No matching payment was found. The reason is shown; correct the details and send again, or contact the office.

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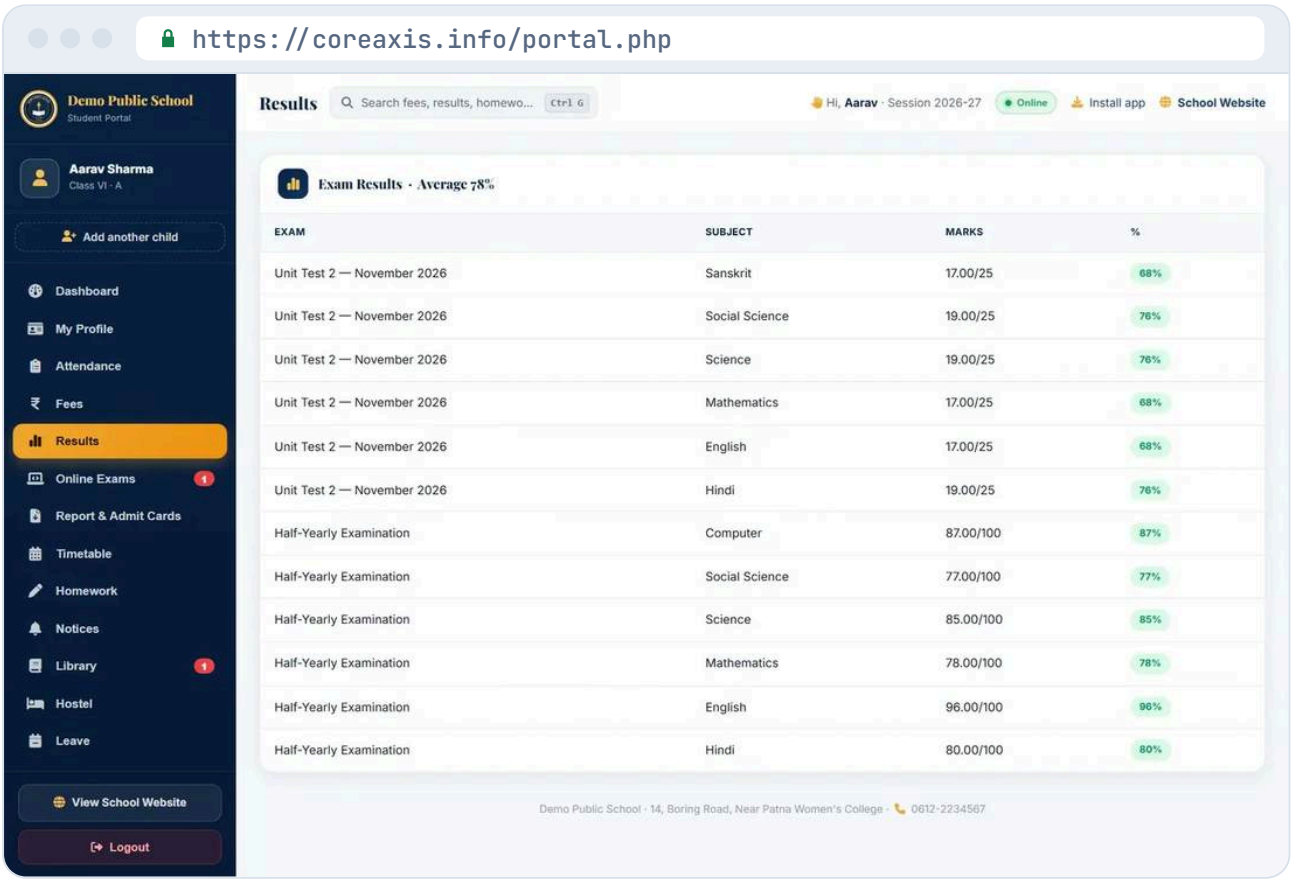
Results and report cards

1. Click **Results** to see each published exam, subject, marks and percentage, with the overall average.



Half-Yearly Examination results; average 84%.

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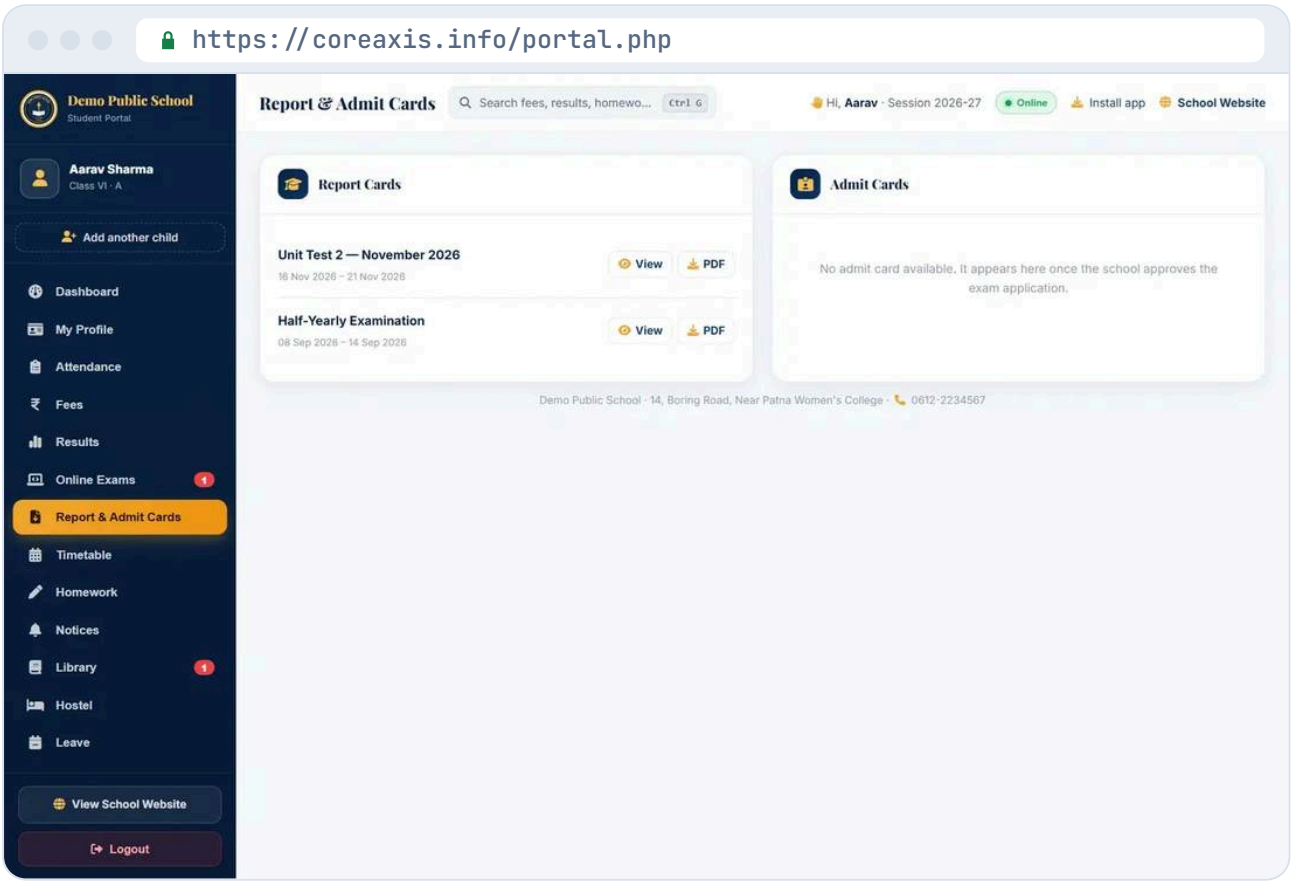
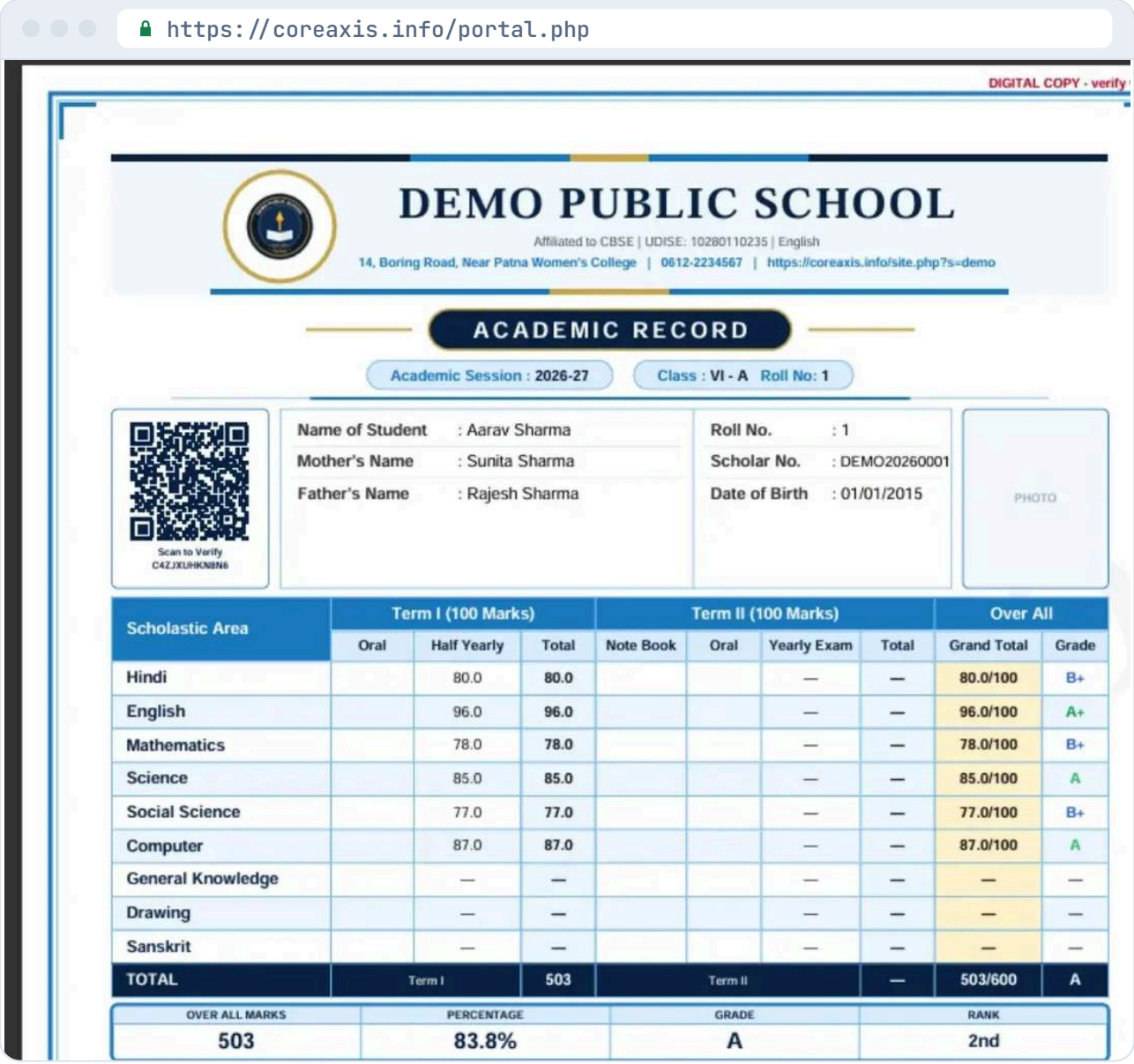
2 Click **Report & Admit Cards**. Under **Report Cards**, each published exam has **View** and **PDF**.



Admit cards appear here once the school approves the exam application.

3 Click **View** (or **PDF**) next to **Half-Yearly Examination** to open the report card.



Aarav Sharma's academic record, marked DIGITAL COPY, with a QR code to verify it.

TIP Results appear only after the school publishes the exam. Ask the class teacher if a result is missing.

Take an online test (example: Mathematics Practice Test (CBT), 5 questions, 20 minutes)

Online tests work like national computer-based tests: a question palette, Mark for Review, a timer and an automatic result. The worked example has negative marking (0.25 for a wrong answer).

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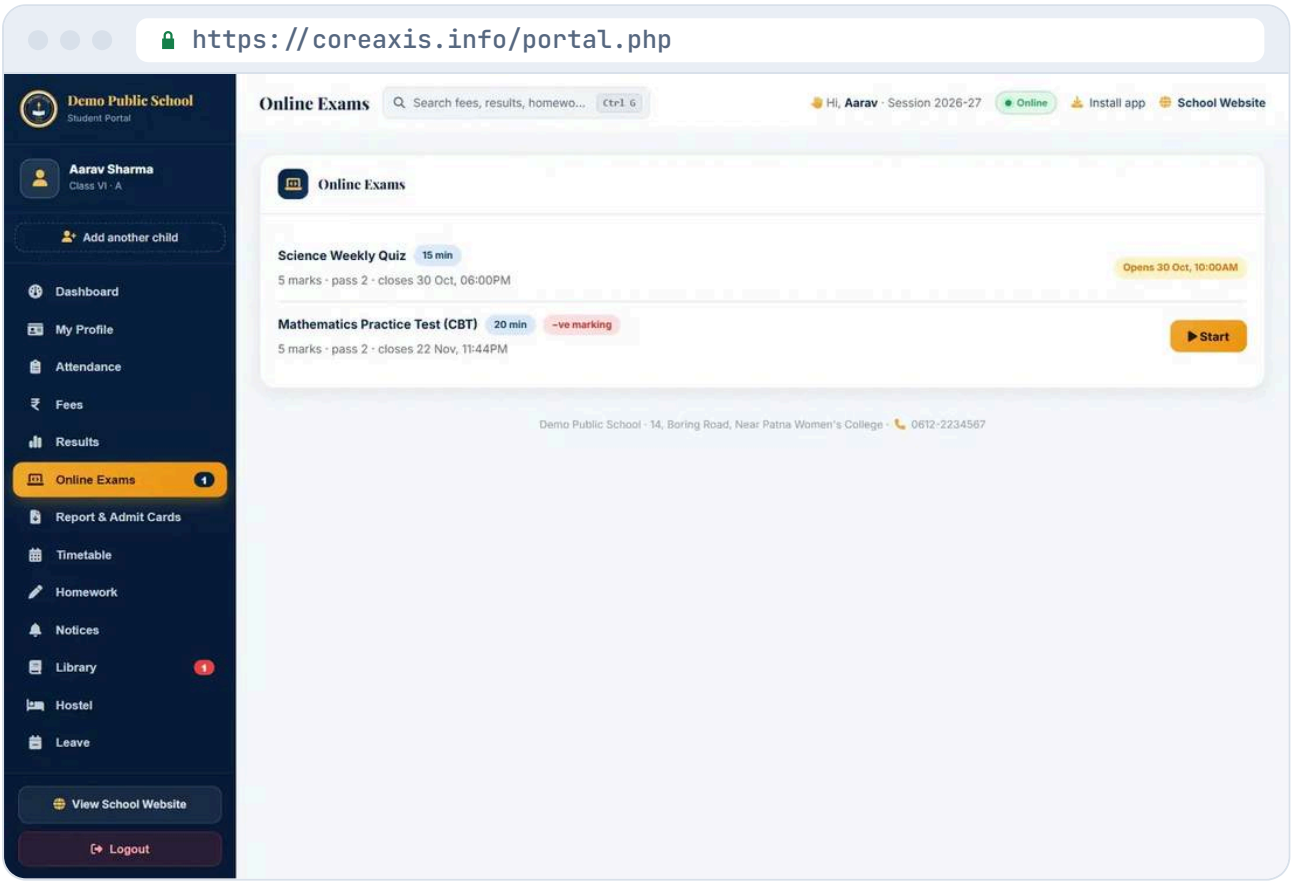
1 Click **Online Exams**. Open tests show **Start**; tests that open later show their opening time.



Science Weekly Quiz opens on 30 Oct; Mathematics Practice Test (CBT) is open now.

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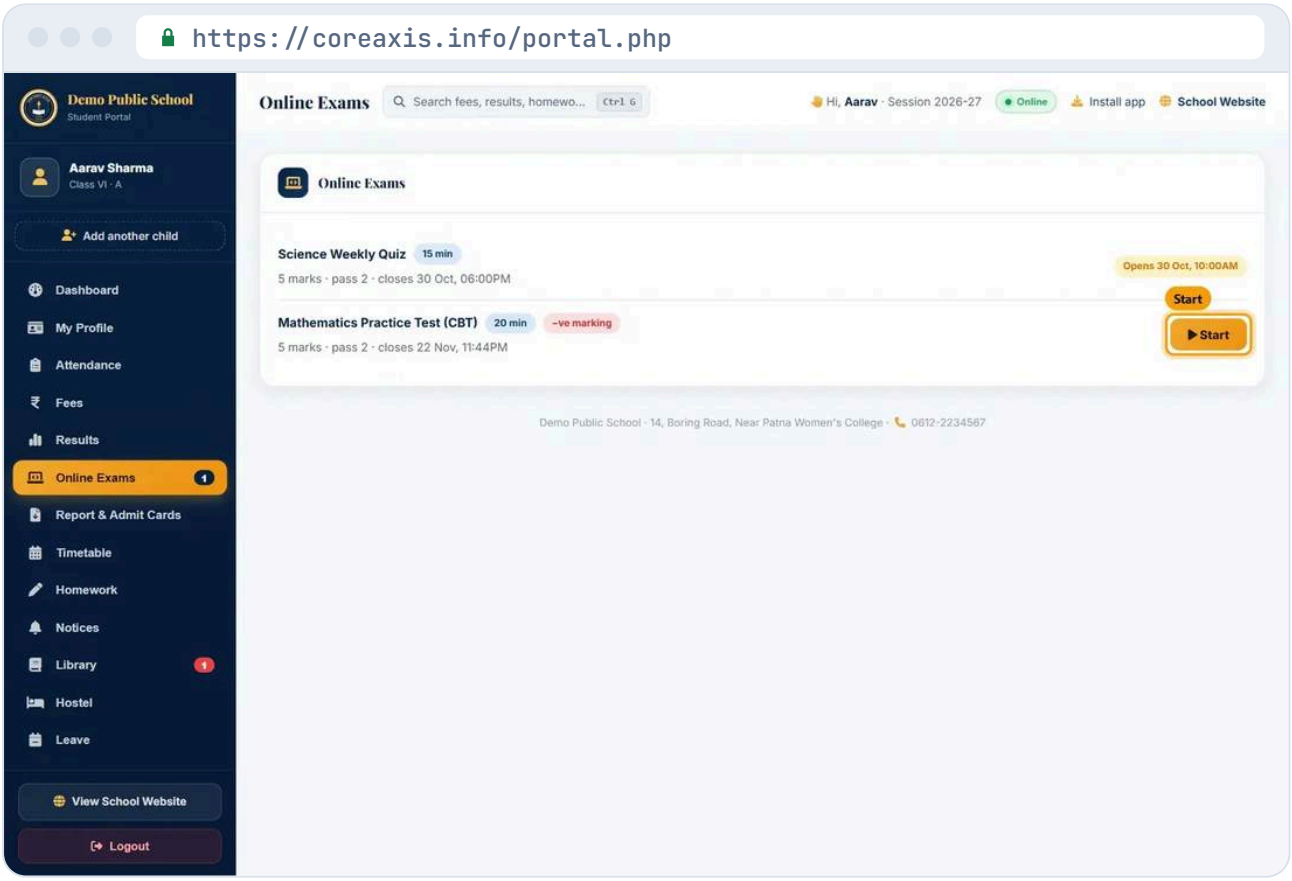
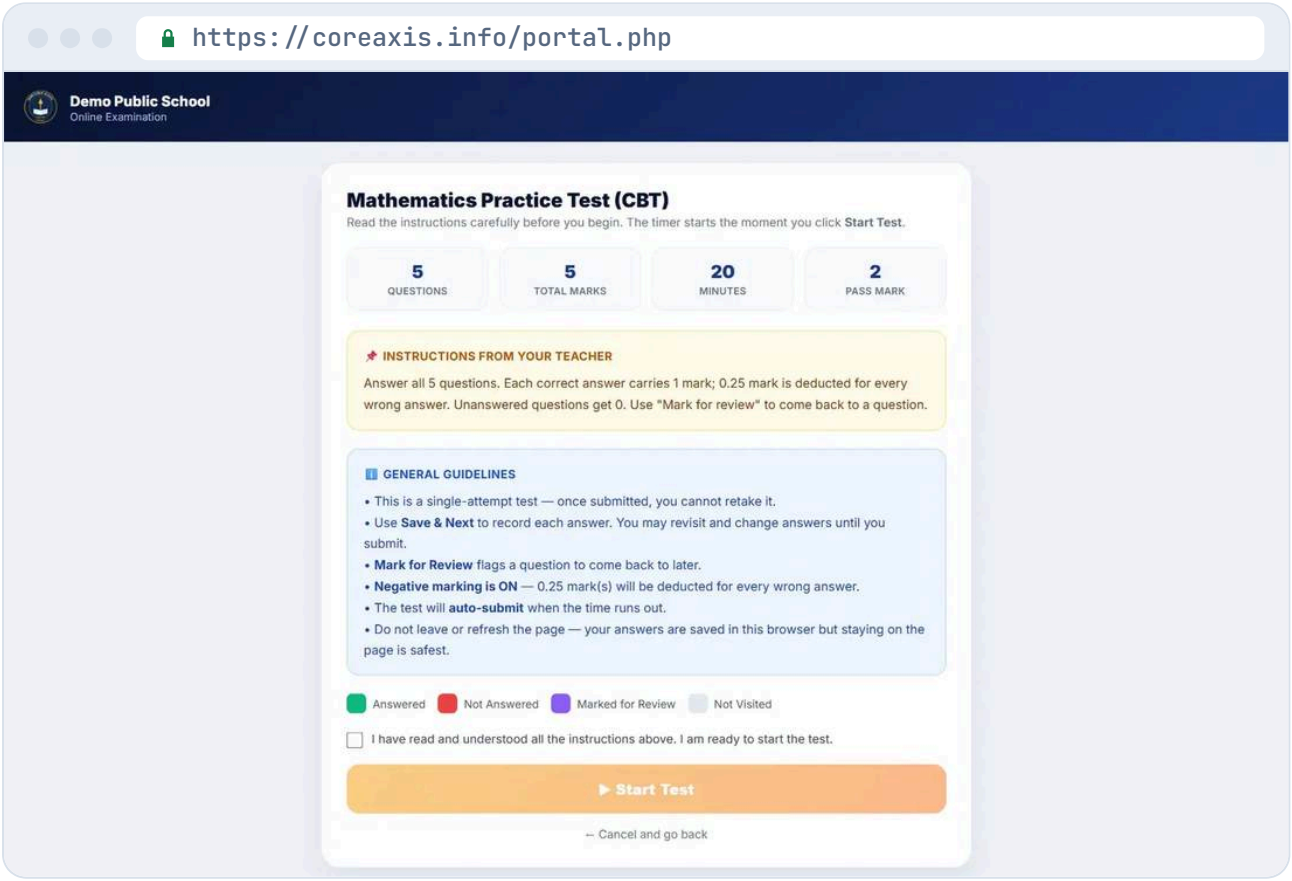
2 Click **Start** on the test.

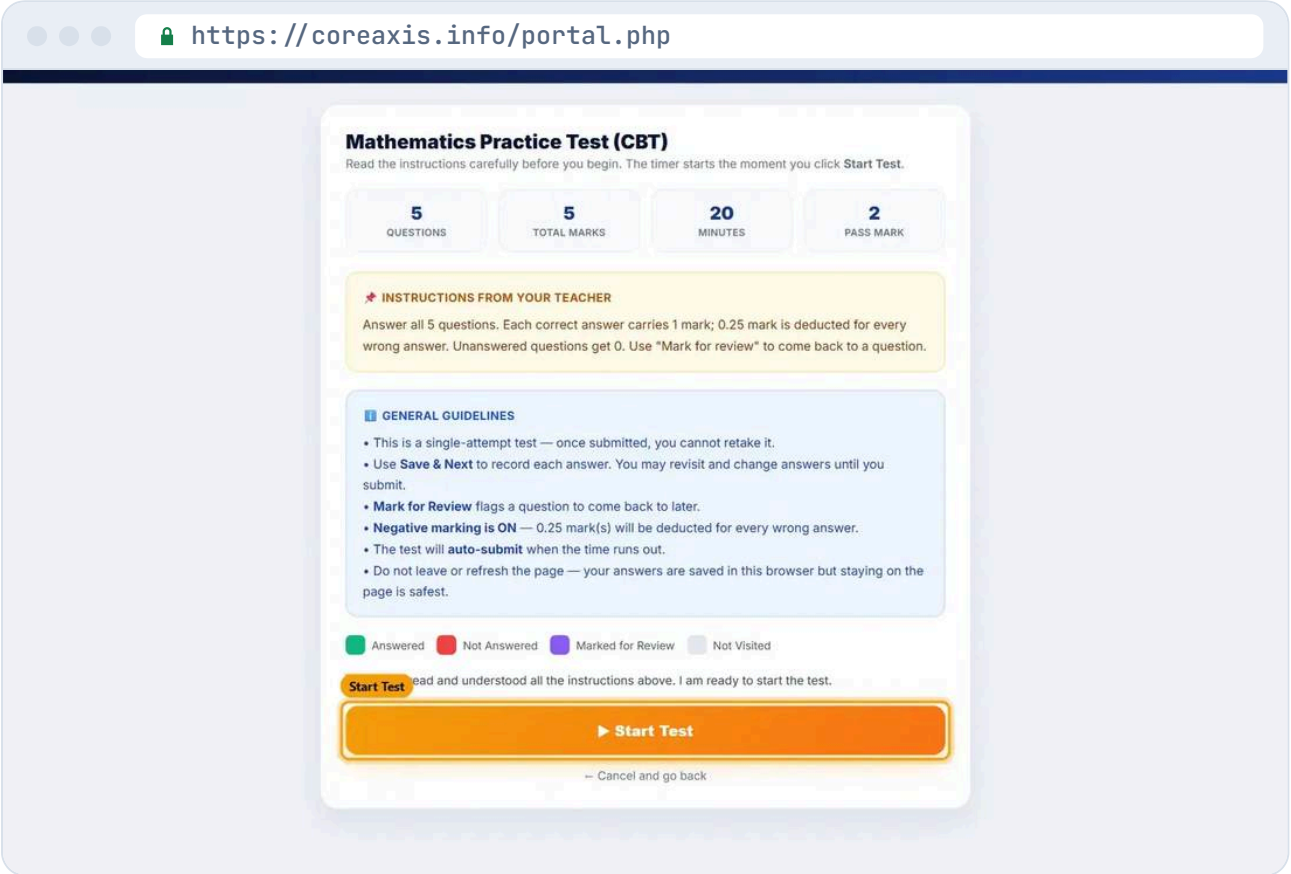


3 Read the instructions: questions, total marks, minutes, pass mark, the teacher's instructions and the general guidelines.

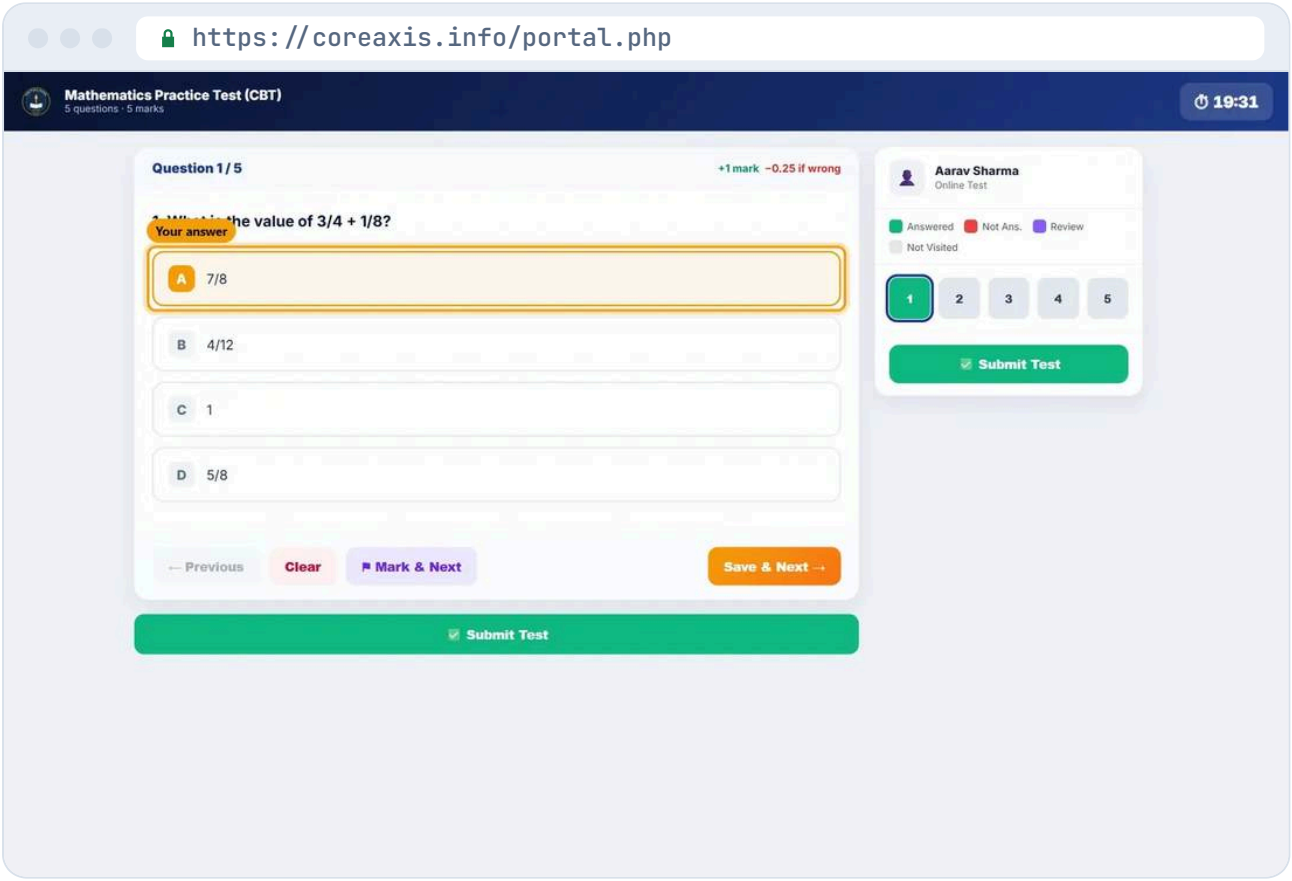


The timer starts when you click Start Test. The test can be taken once.

4 Tick **I have read and understood all the instructions above** and click **Start Test**.

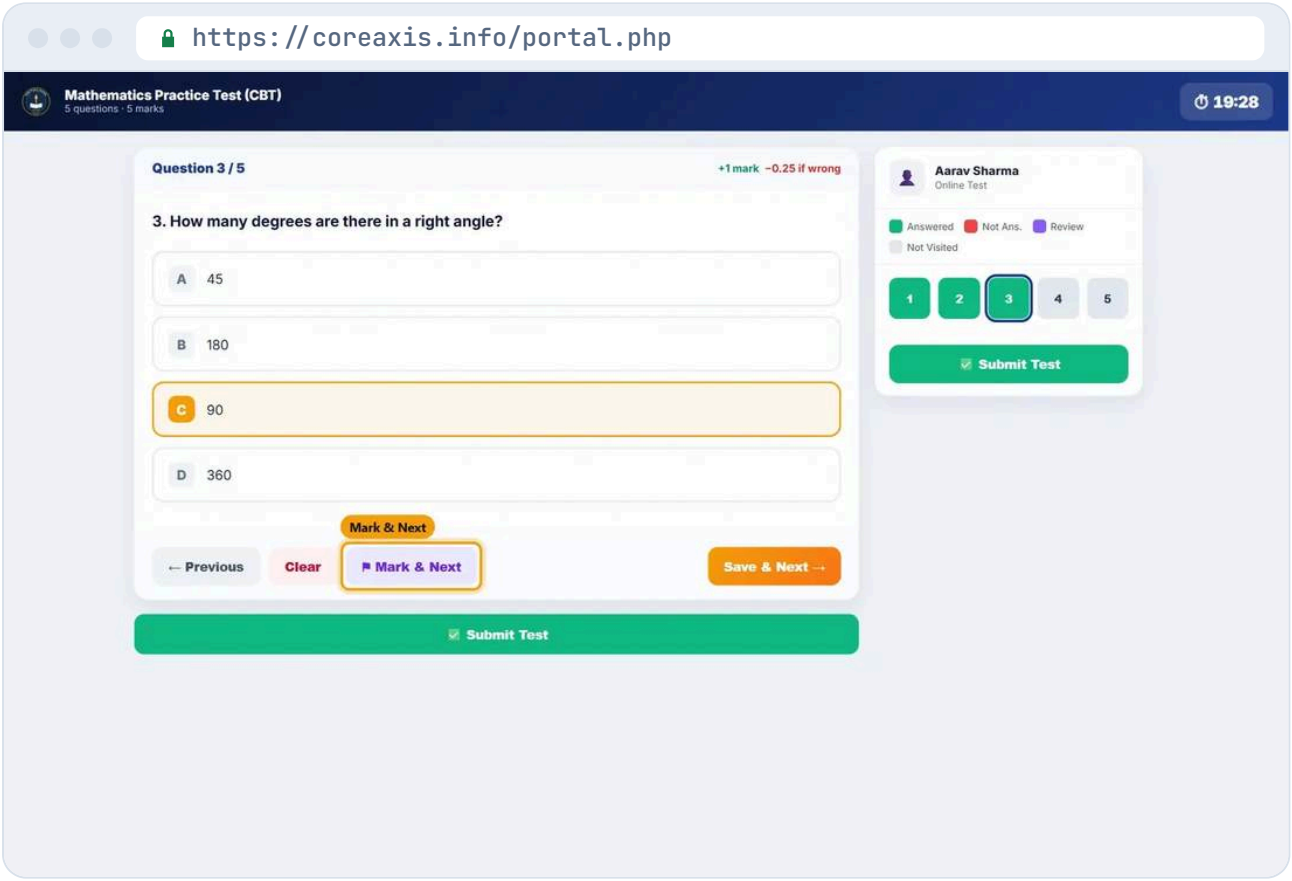


5 Click an option to answer. Click **Save & Next** to go on, **Previous** to go back, **Clear** to remove your answer.



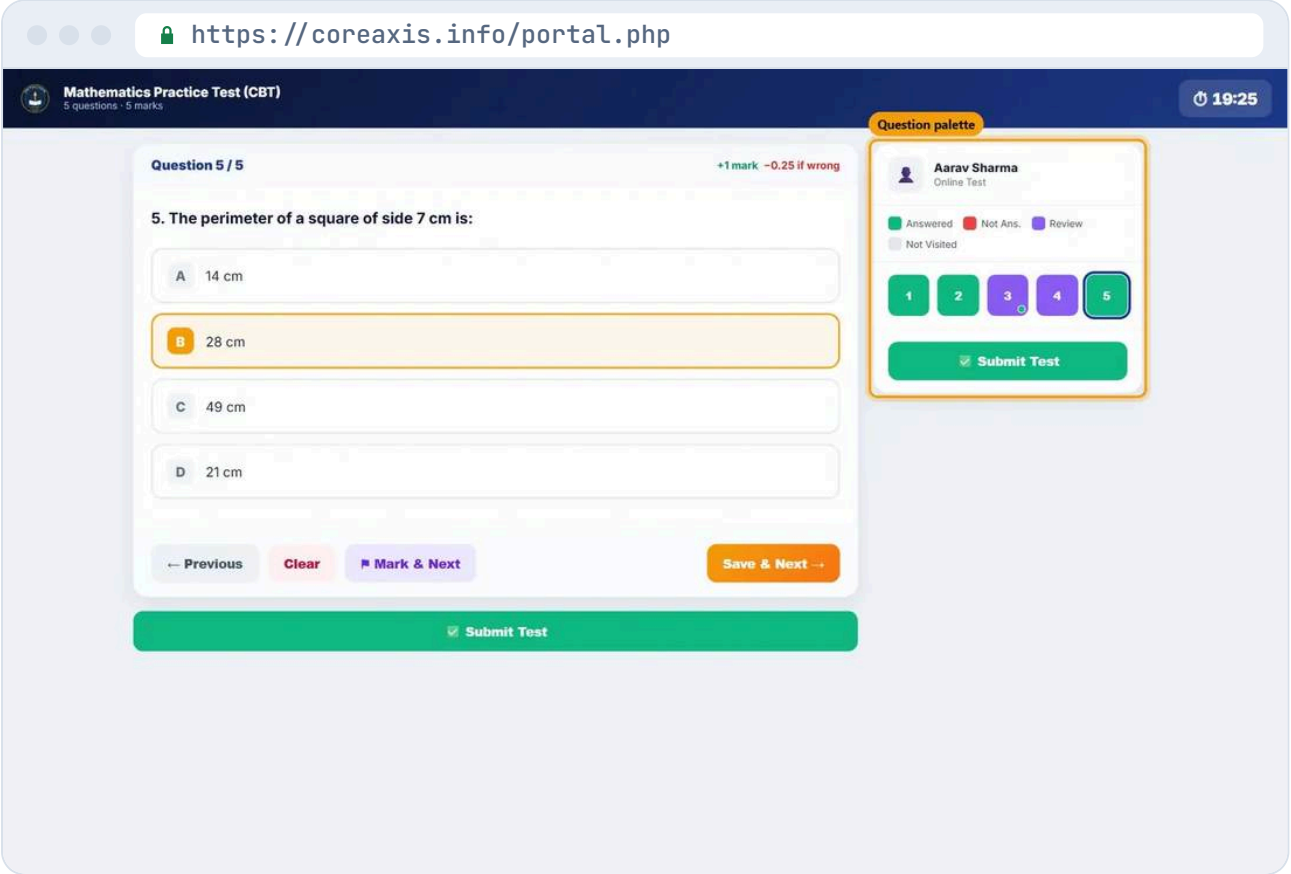
Question 1: 3/4 + 1/8 = 7/8 (option A). The top right shows the time left.

6 Not sure? Click **Mark & Next**. The question turns purple in the palette so you can come back to it.



Mark & Next keeps your answer and flags the question for review.

7 Use the **question palette** to jump to any question. Green = answered, red = not answered, purple = marked for review (purple with a green dot = answered and marked), grey = not visited.



Questions 3 and 4 are marked for review; 1, 2 and 5 are answered.

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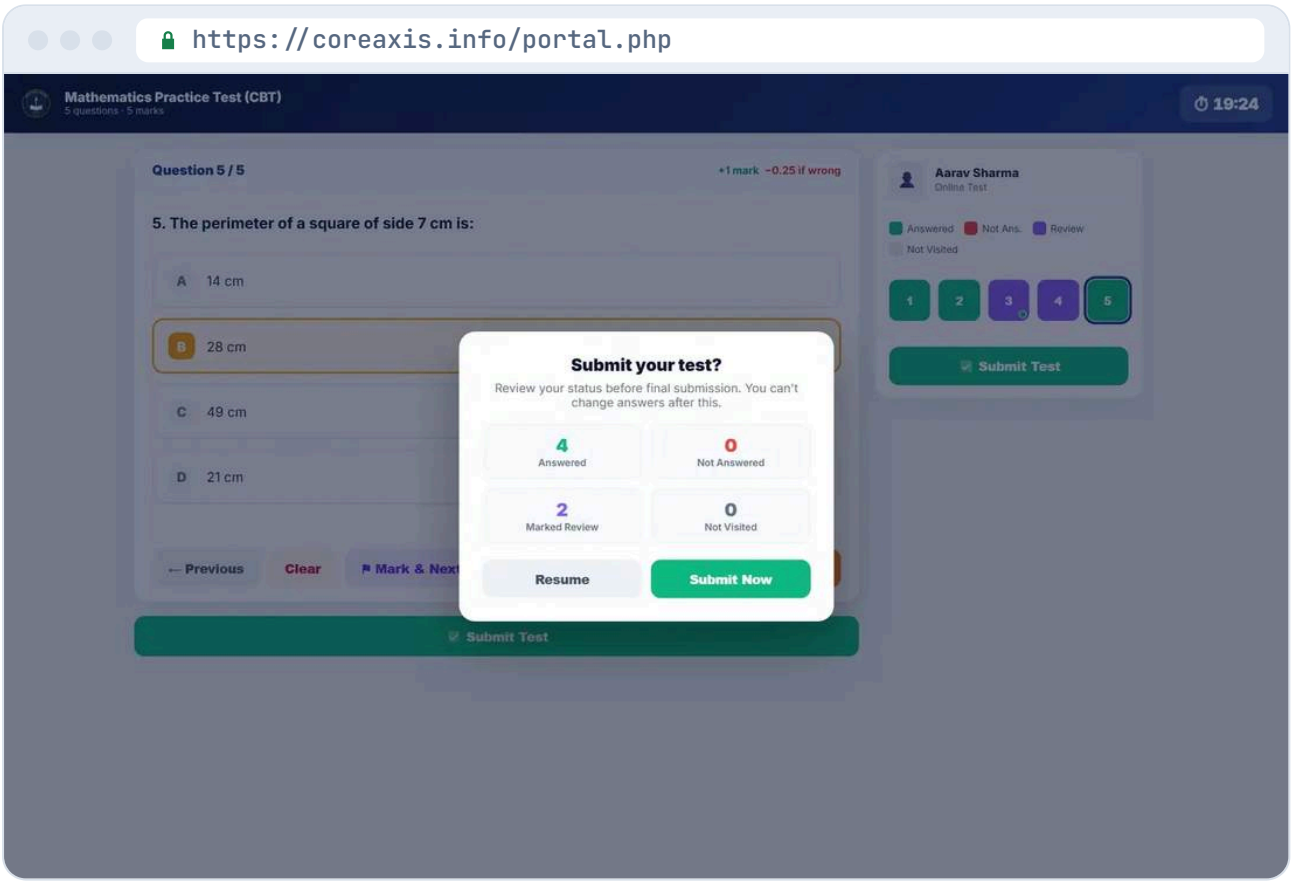
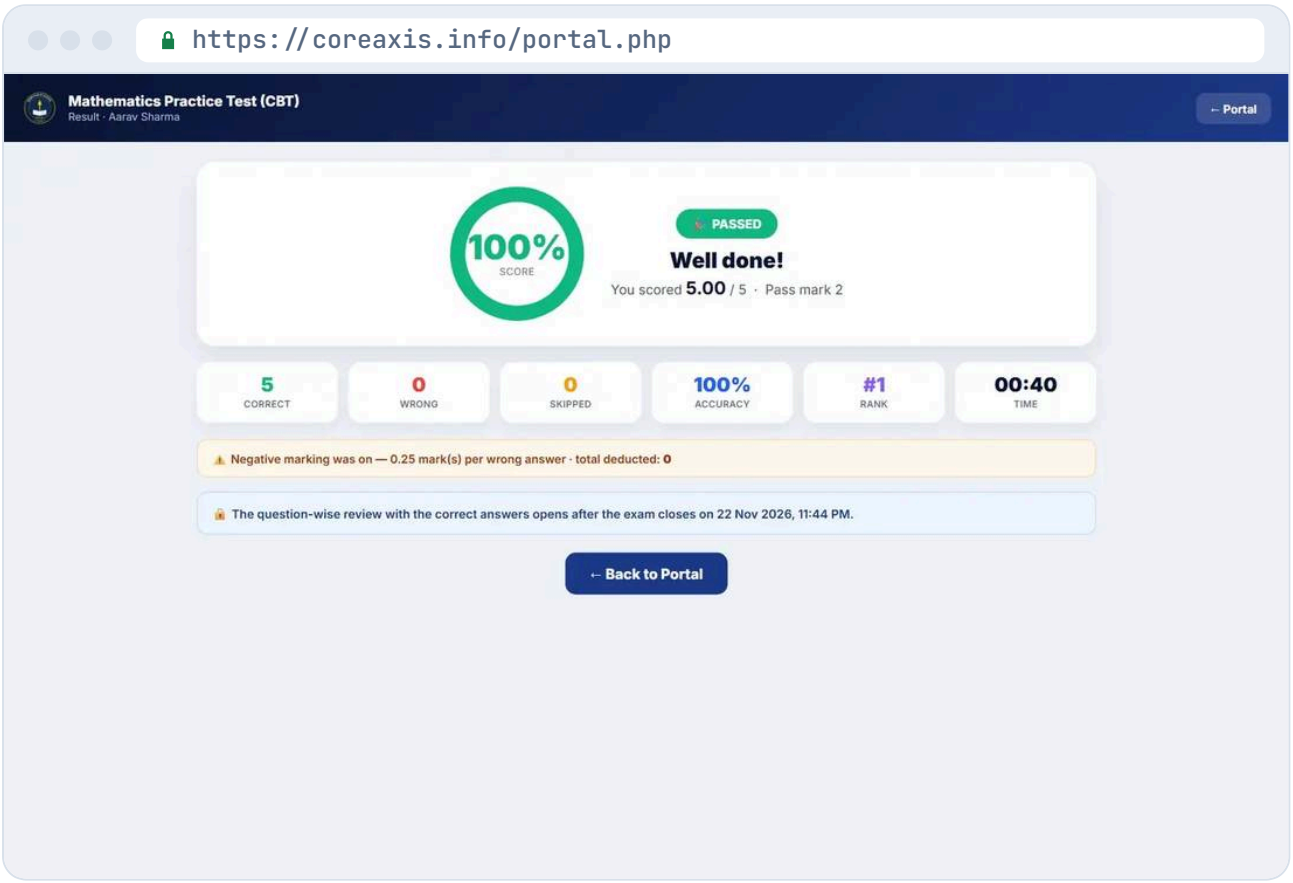
8 Click **Submit Test**. Check the summary (Answered, Not Answered, Marked Review, Not Visited). Click **Resume** to go back, or **Submit Now** to finish.



Answers cannot be changed after Submit Now.

9 The result opens at once: score, pass / fail, correct, wrong, skipped, accuracy, rank and time taken.



Aarav Sharma scored 5.00 / 5 and passed. The question-wise review opens after the test closes on 22 Nov 2026.

TIP If time runs out, the test is submitted automatically.

TIP Do not refresh or leave the page during the test. Answers are kept in the browser, but staying on the page is safest.

TIP With negative marking, a skipped question scores 0 but a wrong answer loses marks.

IMPORTANT Each test can be taken only once. Click Submit Now only when you have checked every question.

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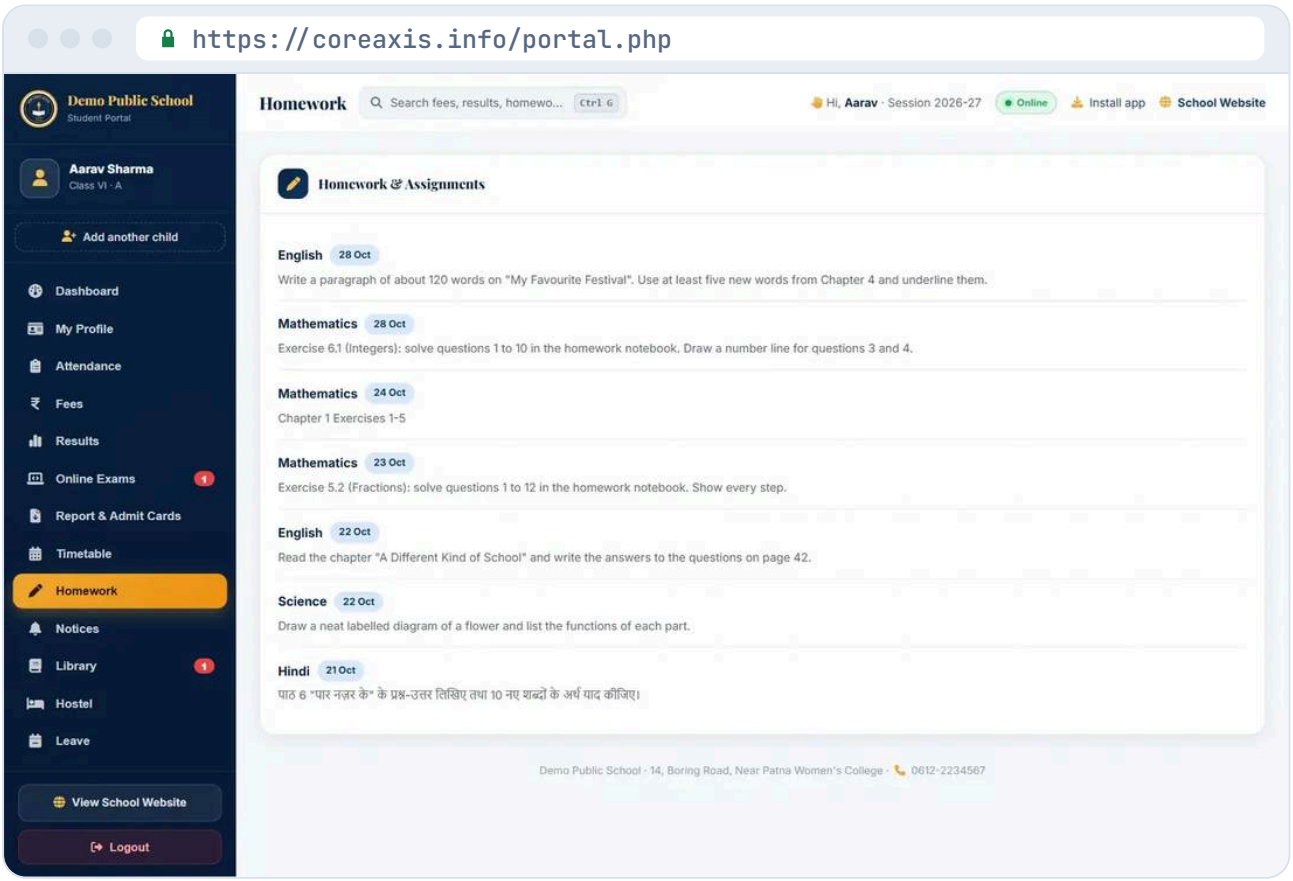
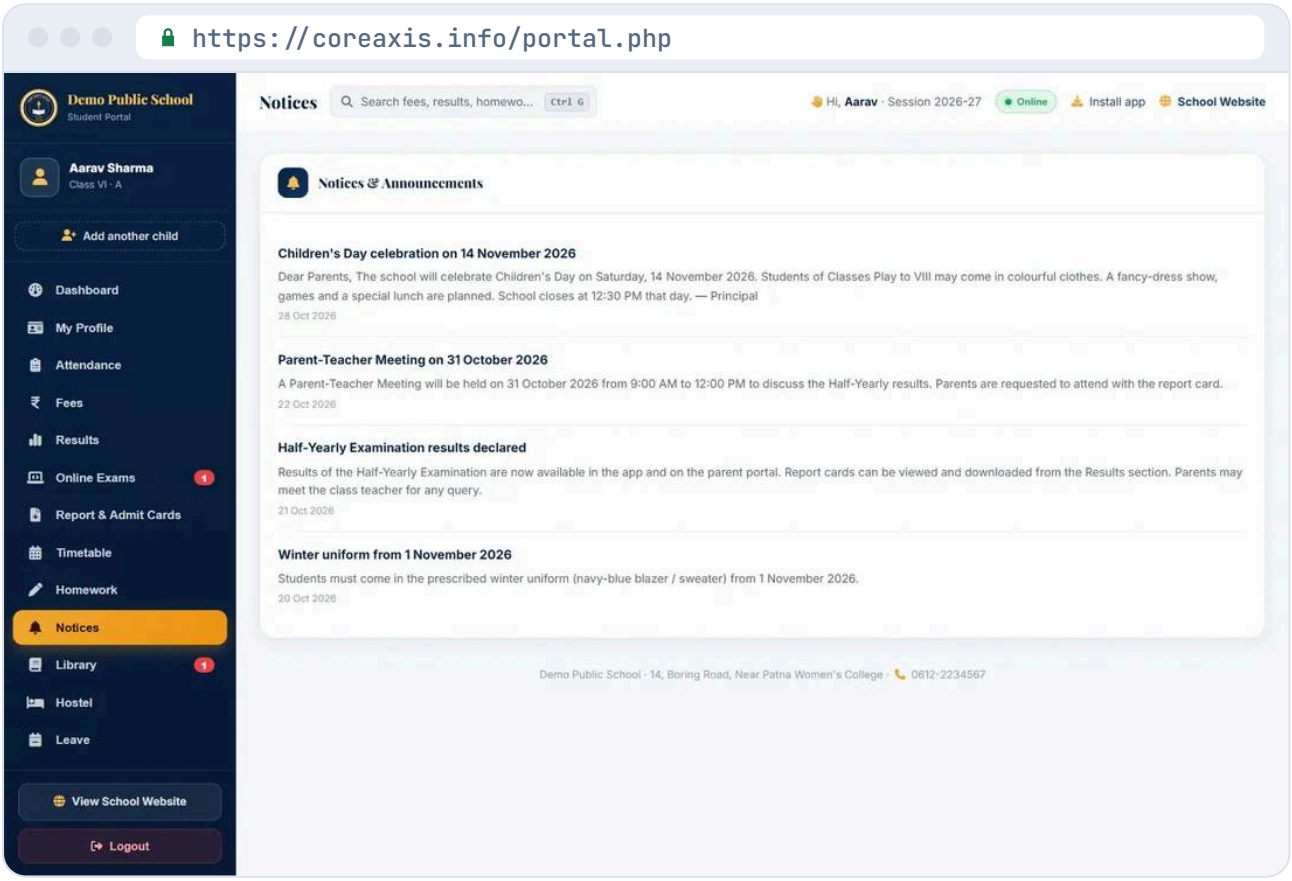
Homework, notices, timetable, library and hostel

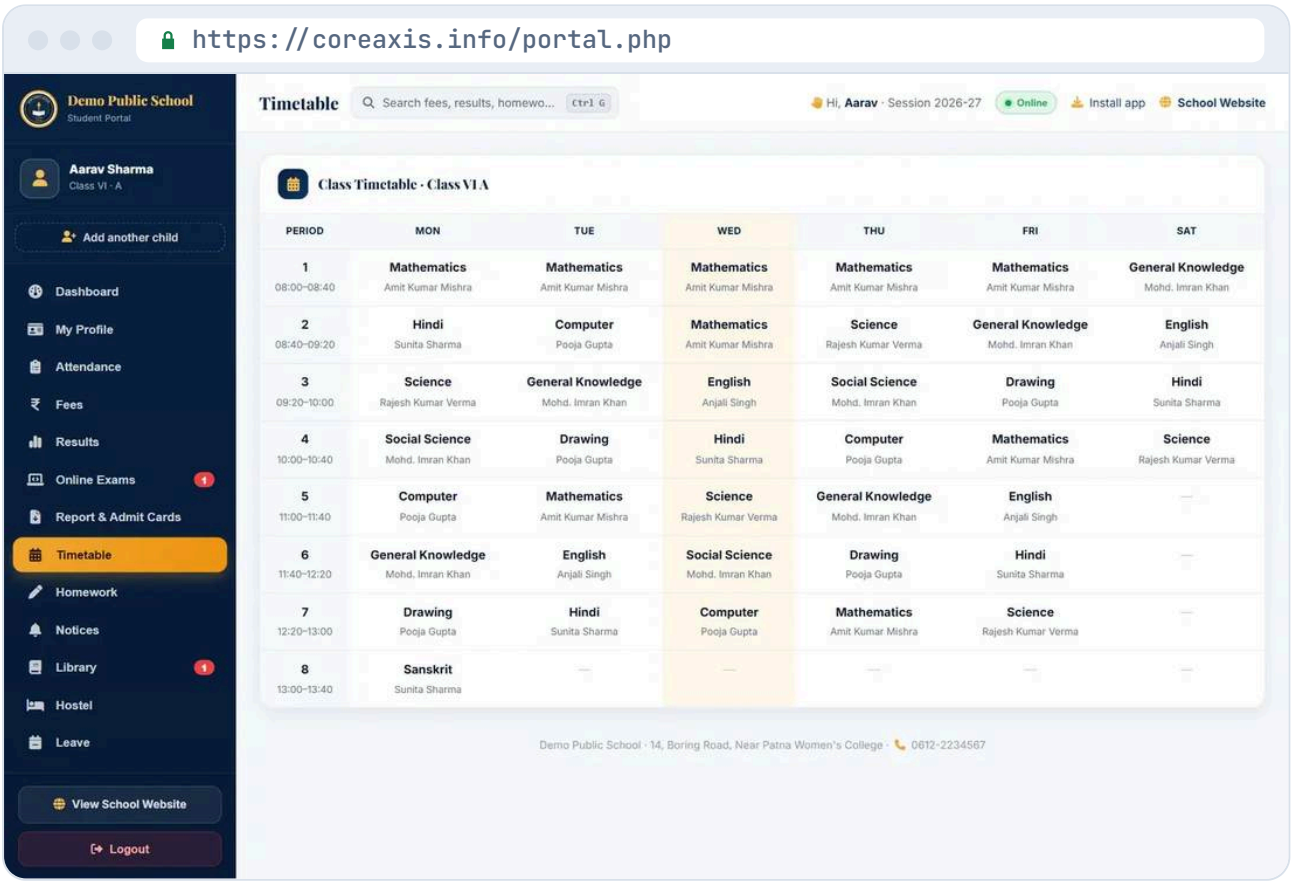
1. **Homework** lists homework for the class, newest first, with subject, date given and the task.



2 **Notices** lists notices for students and parents, newest first.

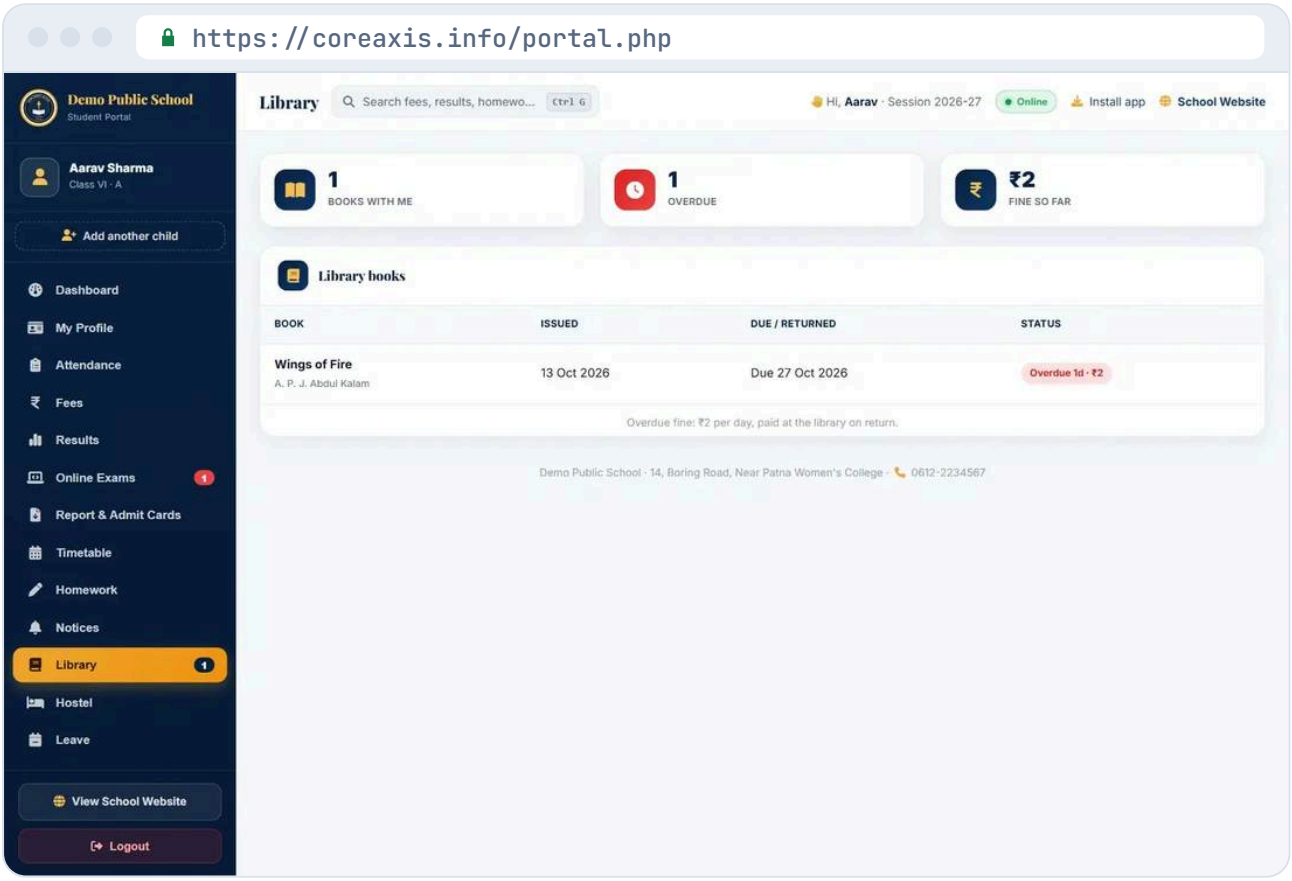


3 **Timetable** shows the class timetable for the week, with subject, teacher and period time.



Class VI A timetable.

4 **Library** shows books issued to the child, the due date, and any overdue fine.



Wings of Fire is 1 day overdue; fine ₹2 per day, paid at the library on return.

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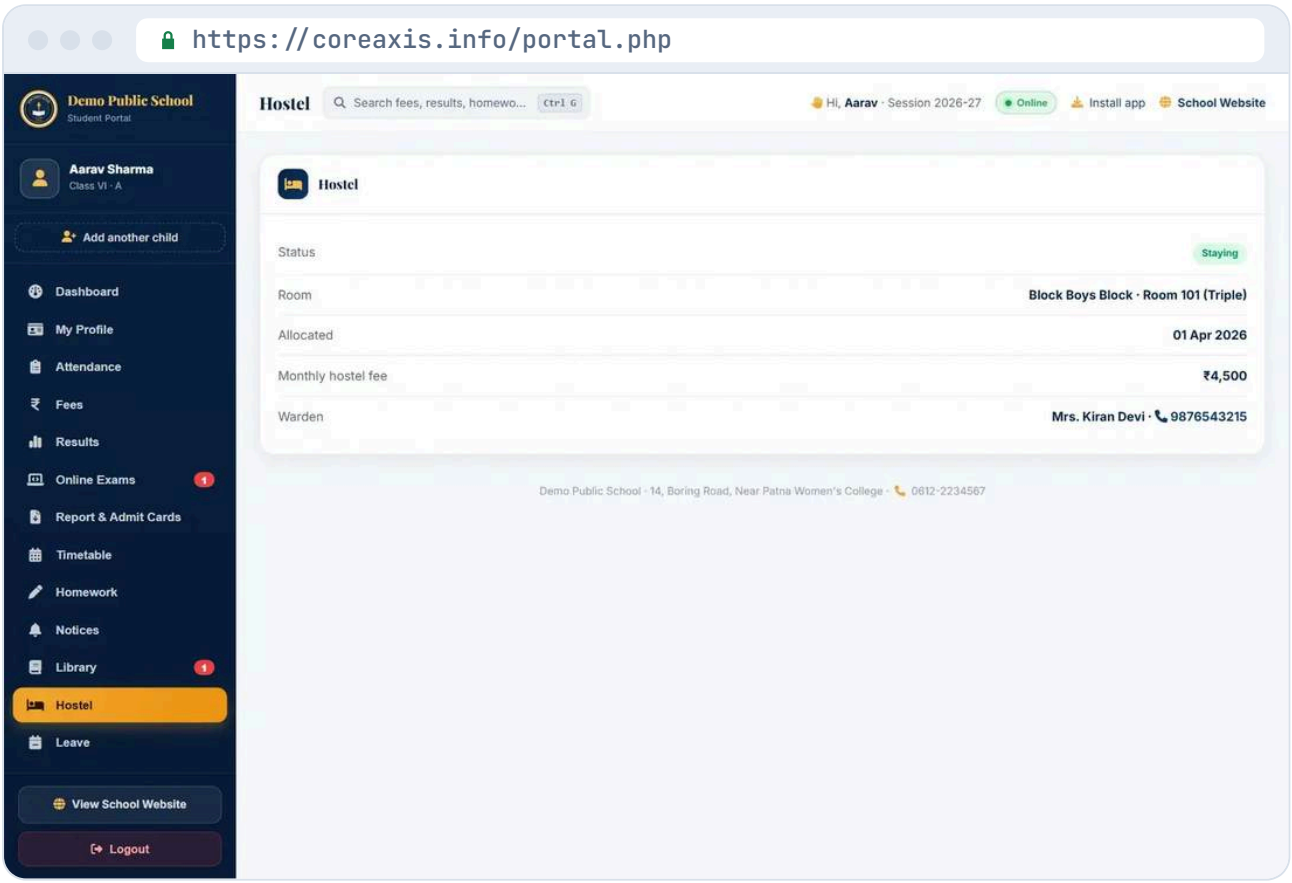
5 **Hostel** (only for hostel students) shows the room, date allotted, monthly hostel fee and the warden's contact.



Homework	Subject, date given, task text. Due dates are set by the teacher.
Notices	Title, text and date of each notice.
Timetable	Period number and time, subject and teacher for Monday to Saturday.
Library	Books with me, Overdue, Fine so far; each book with issue date, due or return date and status.
Transport	Shown only when the child uses school transport: route, stops, vehicle, driver and monthly fare.
Hostel	Shown only for hostel students: status, room, allotted date, monthly fee, warden.

Request leave for the child (example: 6–7 Nov 2026, family wedding in Gaya)

1 Click **Leave**.

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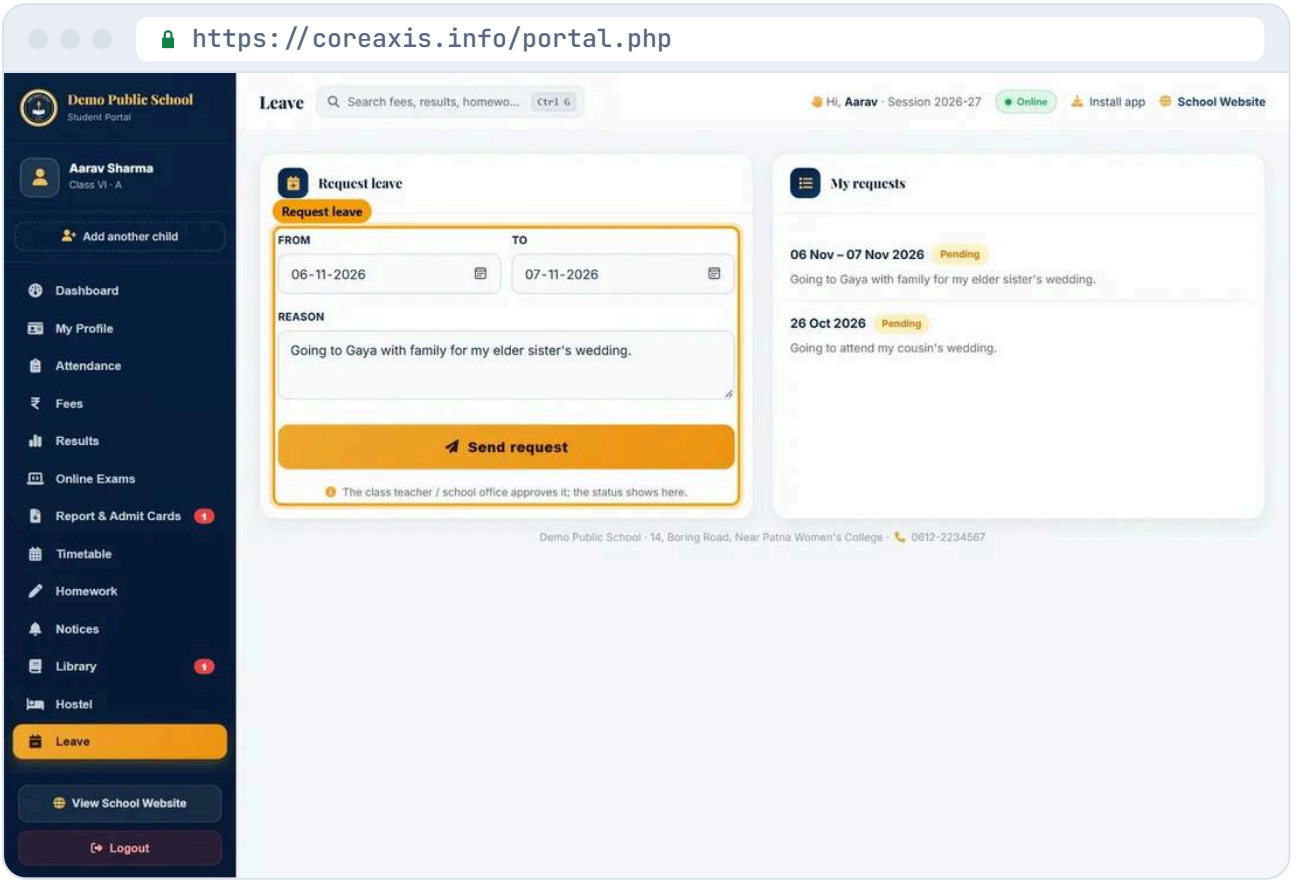
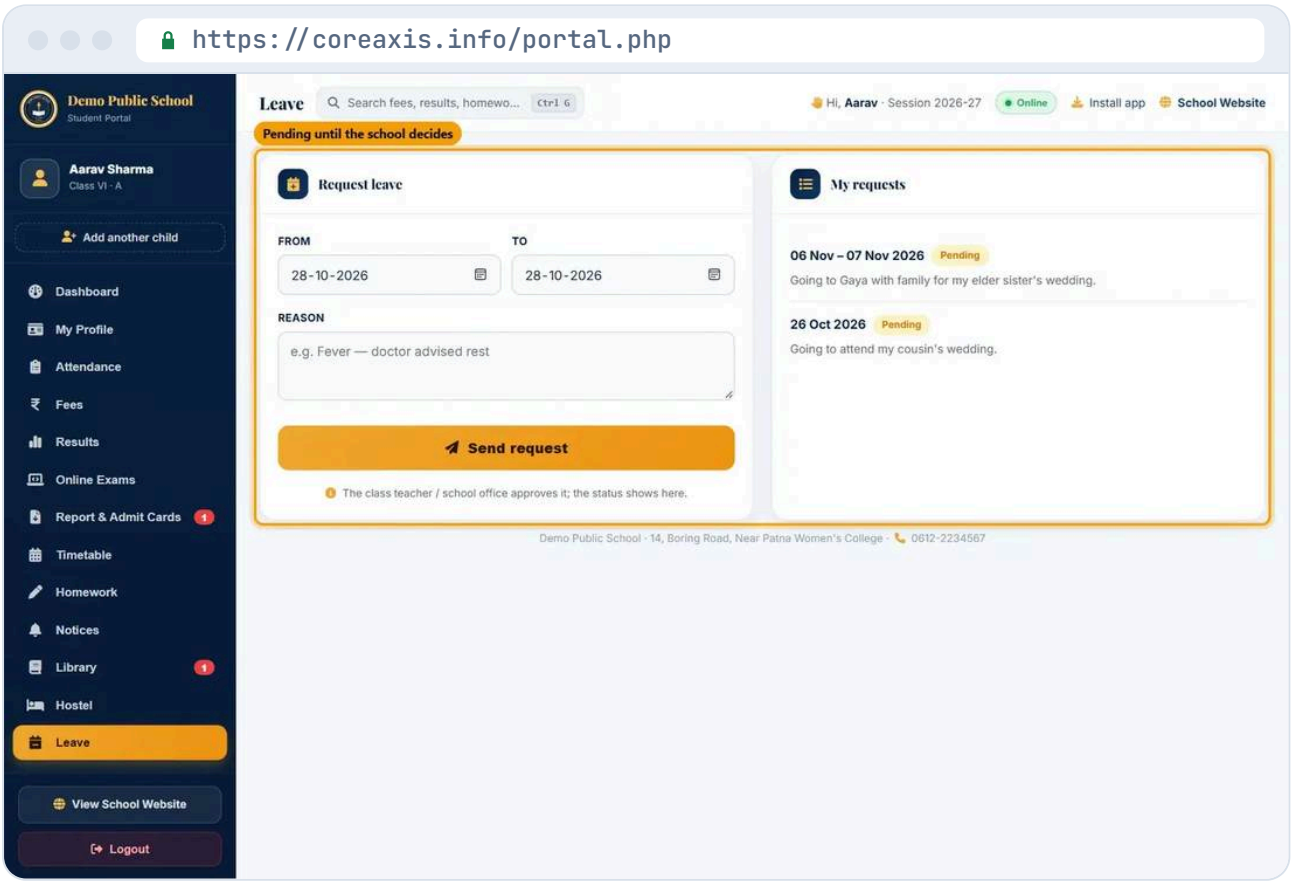
2. Set **From** (06-11-2026) and **To** (07-11-2026).

3. Type the **Reason**: "Going to Gaya with family for my elder sister's wedding."

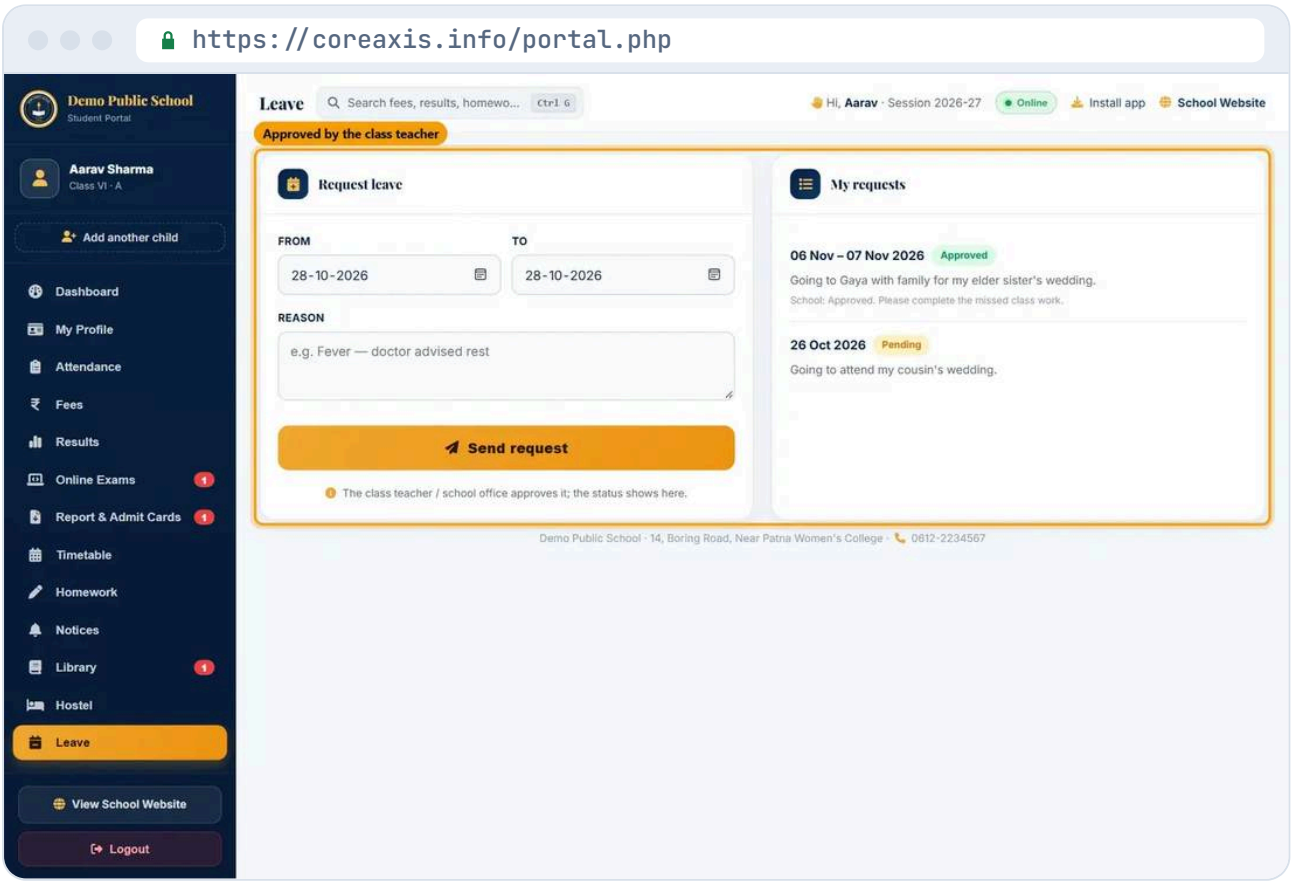


The Request leave form.

4 Click **Send request** and confirm. The request appears under **My requests** as **Pending**.



5 When the class teacher or office decides, the status changes to **Approved** or **Rejected**, with the school's remark.



Approved by the class teacher: "Approved. Please complete the missed class work."

TIP A request that overlaps dates already requested is refused with a message. Dates up to 30 days in the past can be entered for a sick leave already taken.

Add another child and switch between children (example: Ansh Kumar, Class VII-A)

A parent with two or more children in the school can see all of them in one sign-in (up to 6). Each child is checked with that child's own admission number and date of birth.

1 Click **Add another child** (left menu, under the child's name).

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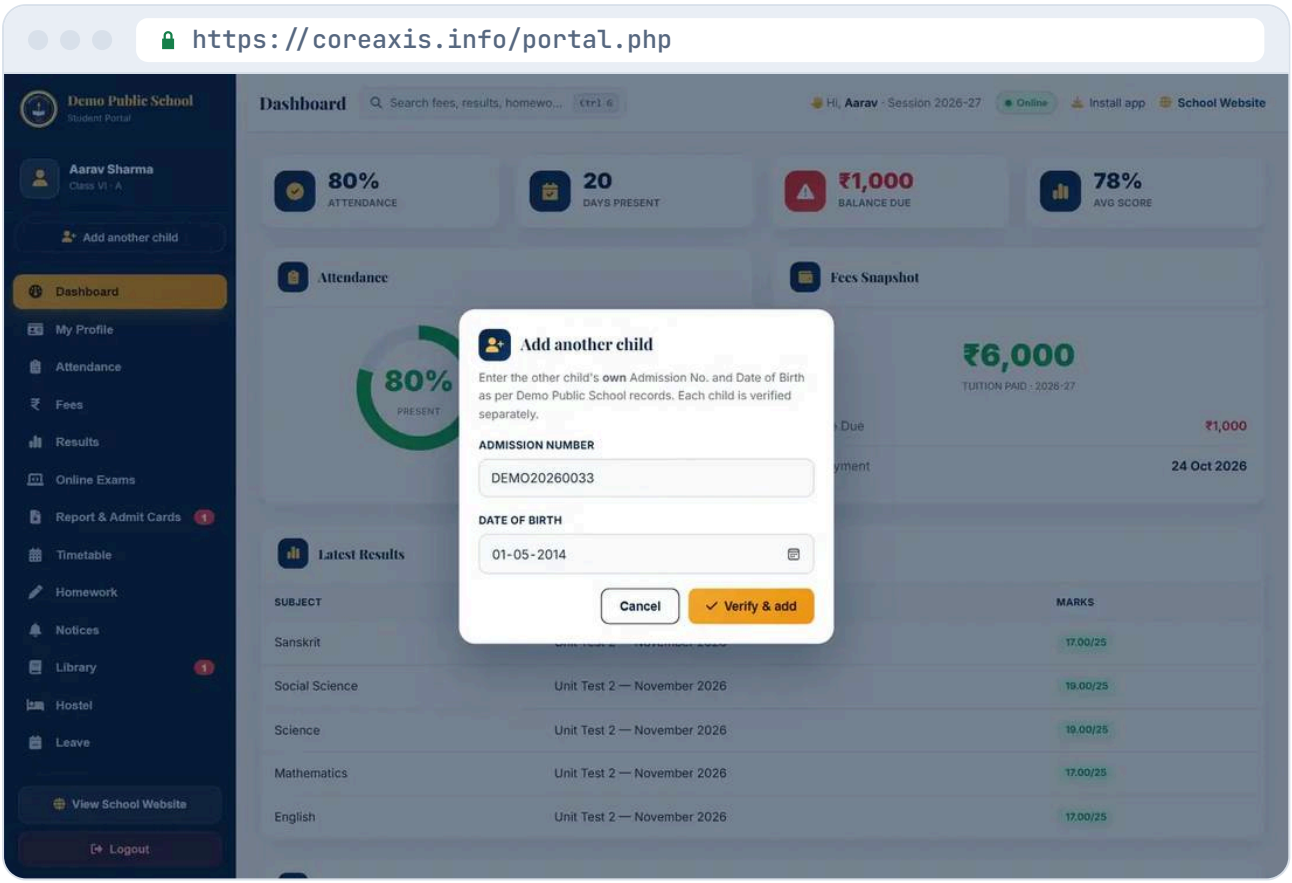
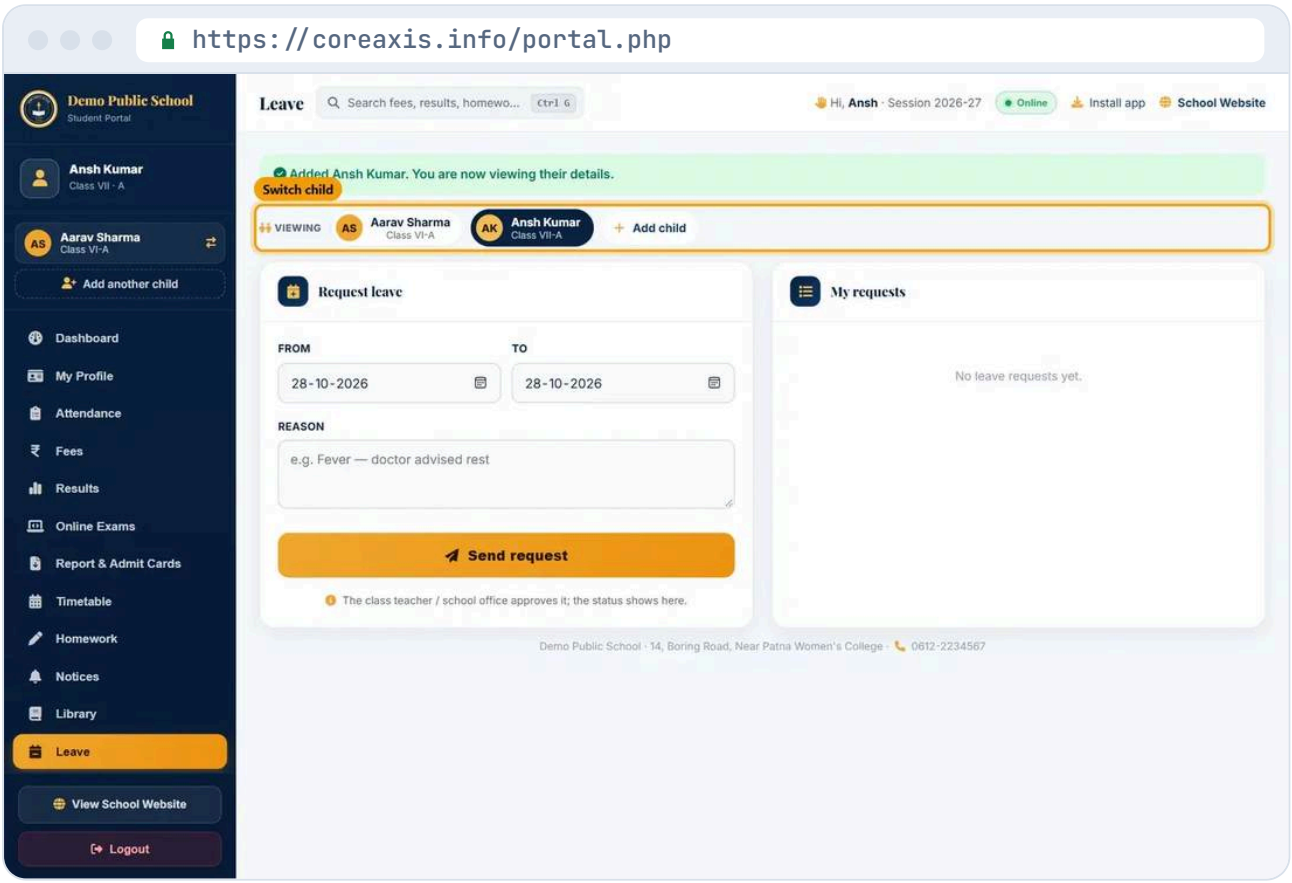
2 Type the other child's **Admission Number** and **Date of Birth** and click **Verify & add**.



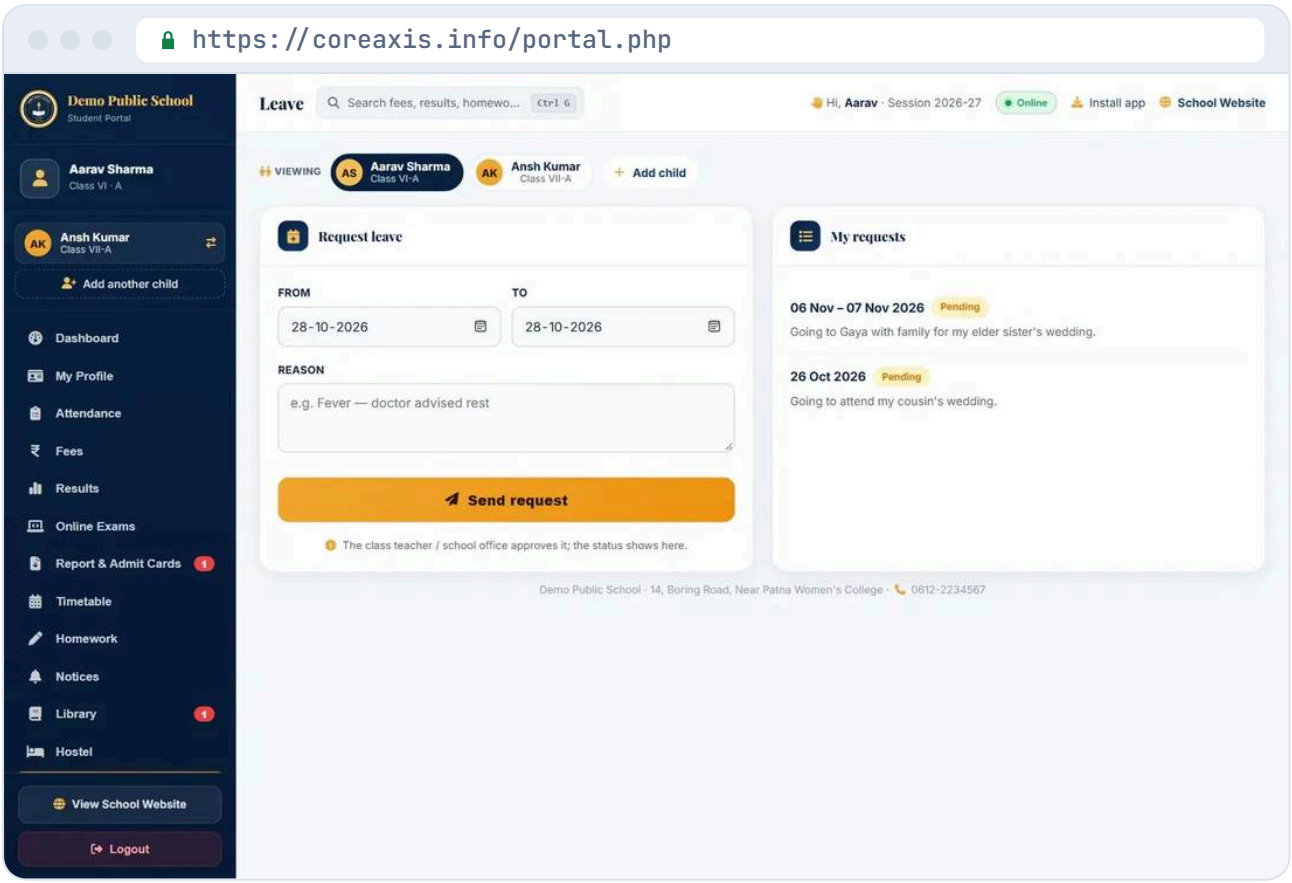
Each child is verified separately.

3 The portal now shows the added child, with a **Viewing** strip at the top for switching.



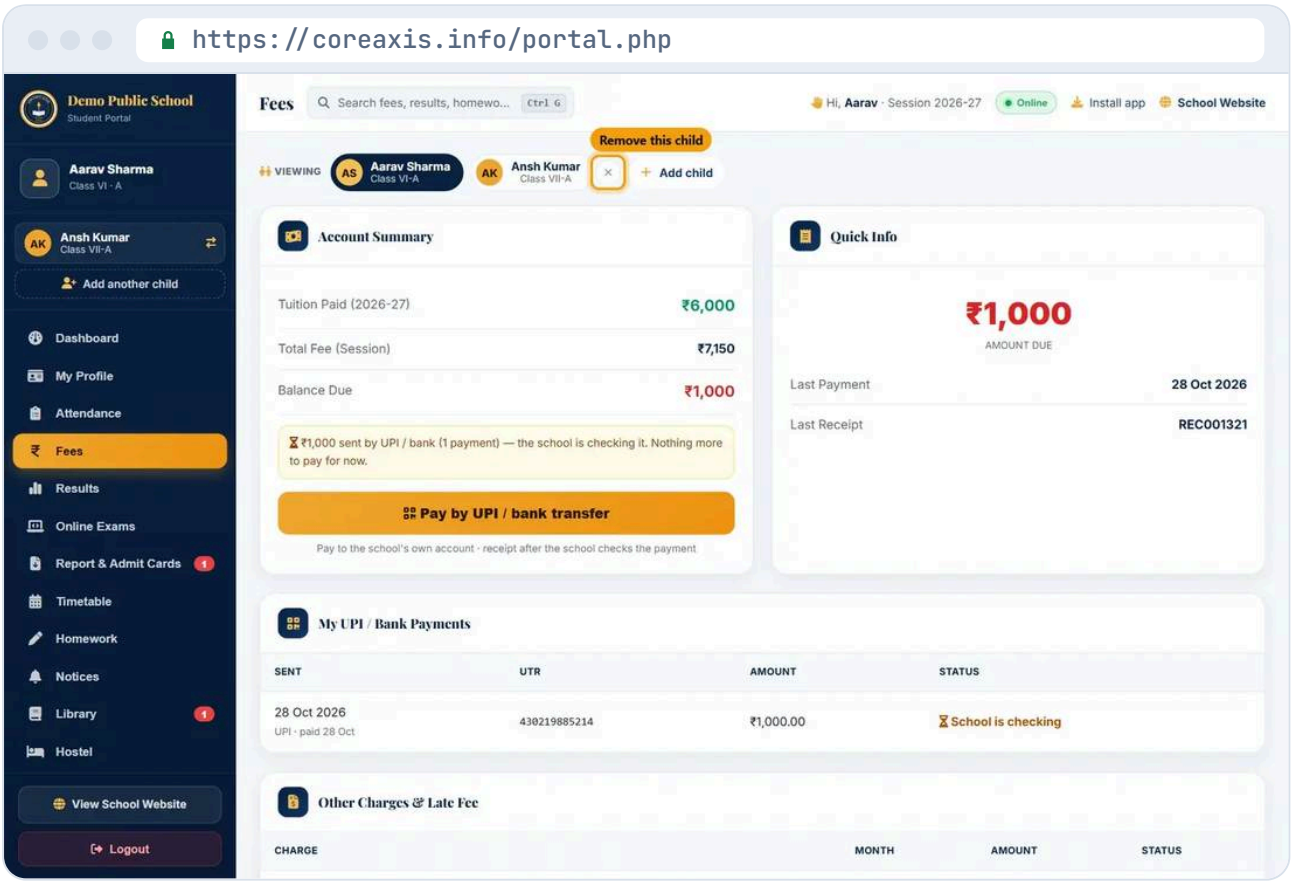
Added Ansh Kumar. You are now viewing their details.

4 Click the other child's name in the strip (or in the left menu) to switch. The same section stays open.



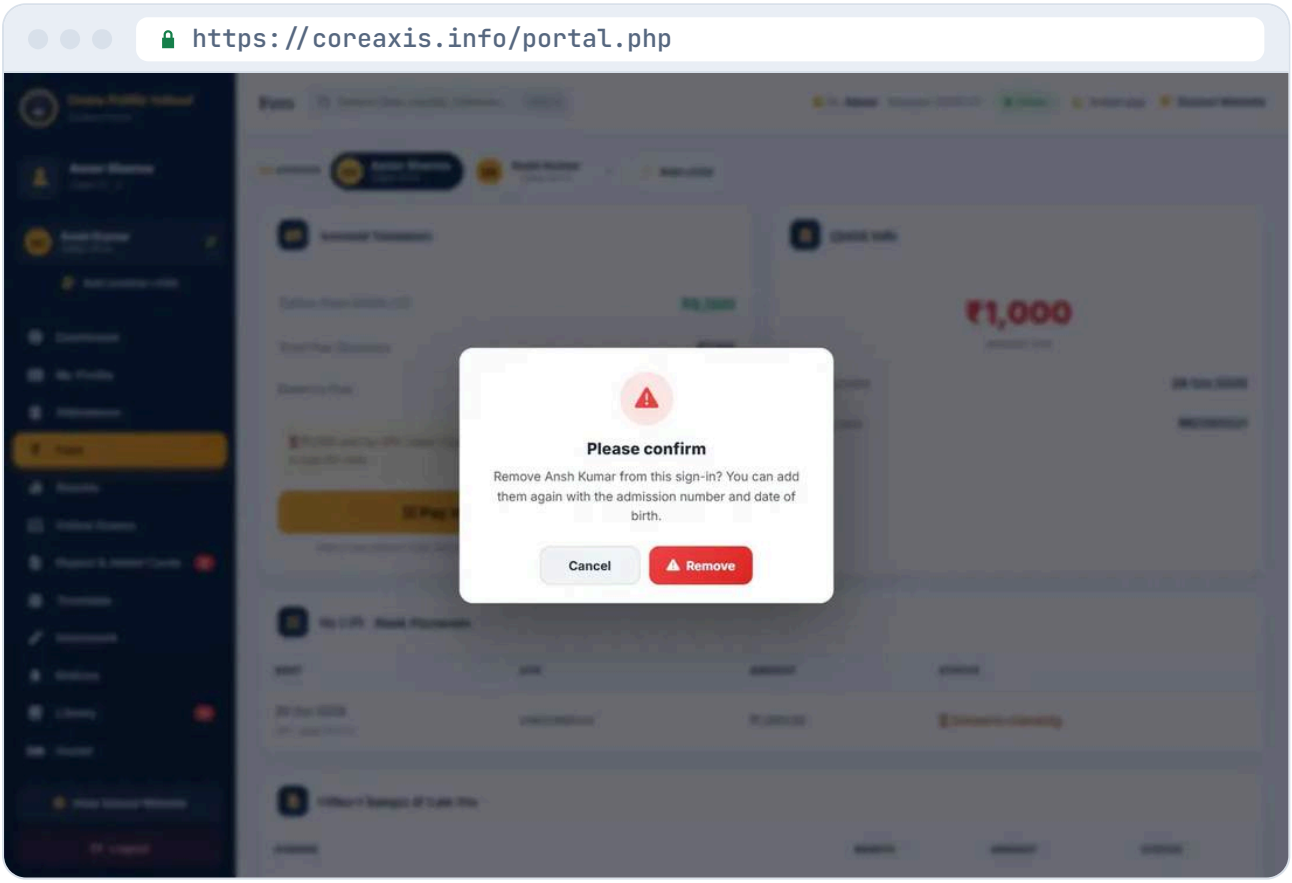
Back on Aarav Sharma. Ansh Kumar stays one click away.

5 To take a child off this sign-in, click the small **×** next to the child's name in the **Viewing** strip (shown for the children you are not viewing).



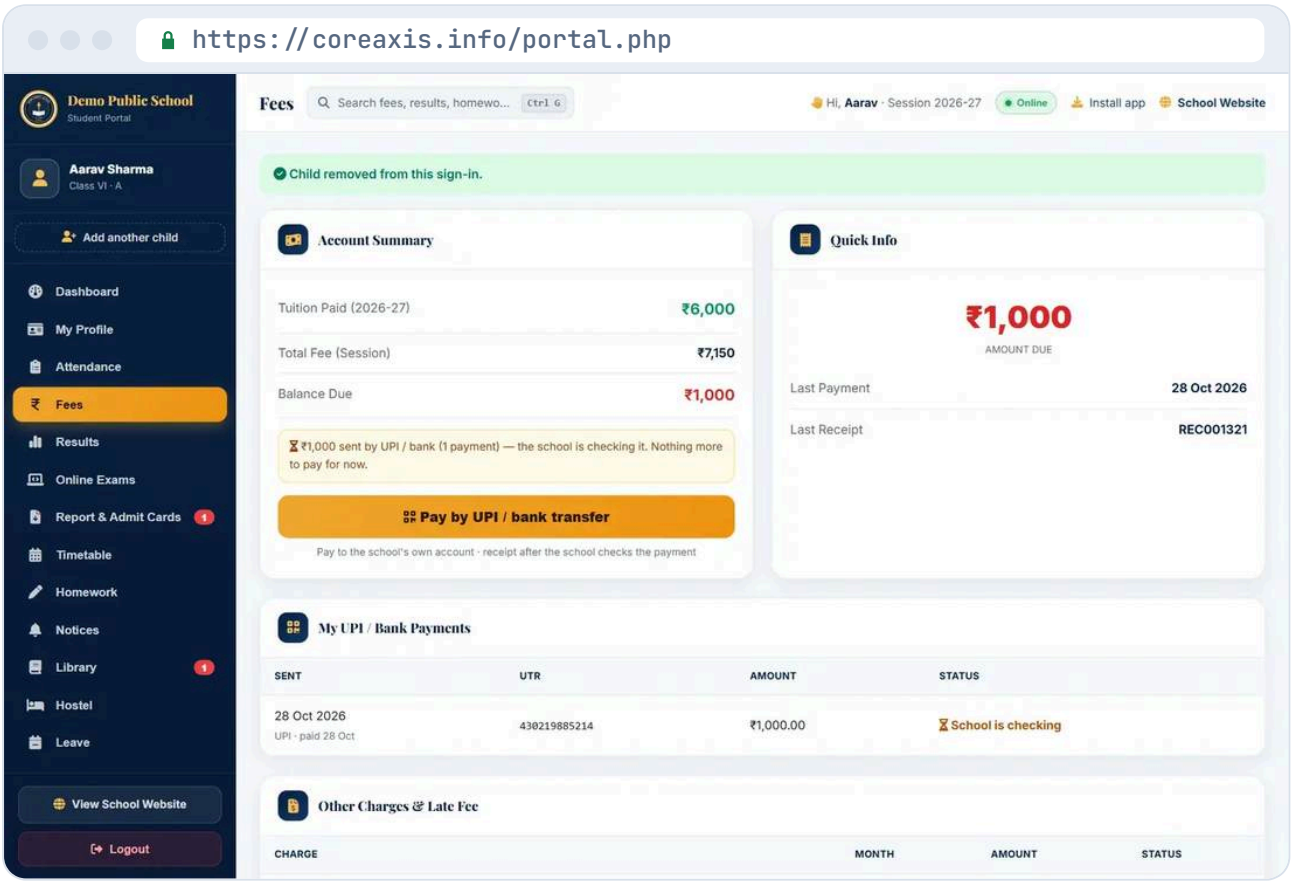
The × button removes Ansh Kumar from this sign-in.

6 Read the popup ("Remove Ansh Kumar from this sign-in? You can add them again with the admission number and date of birth.") and click **Remove**, then **Yes, proceed**.



Removing asks twice.

7 The message **Child removed from this sign-in.** appears. Only the sign-in changes; the child's records at the school are not touched.



Back to Aarav Sharma only.

TIP The children stay linked only for this sign-in. After Logout, sign in again and add them again.

TIP To remove the child you are viewing, first switch to another child; the × shows only on the other children.

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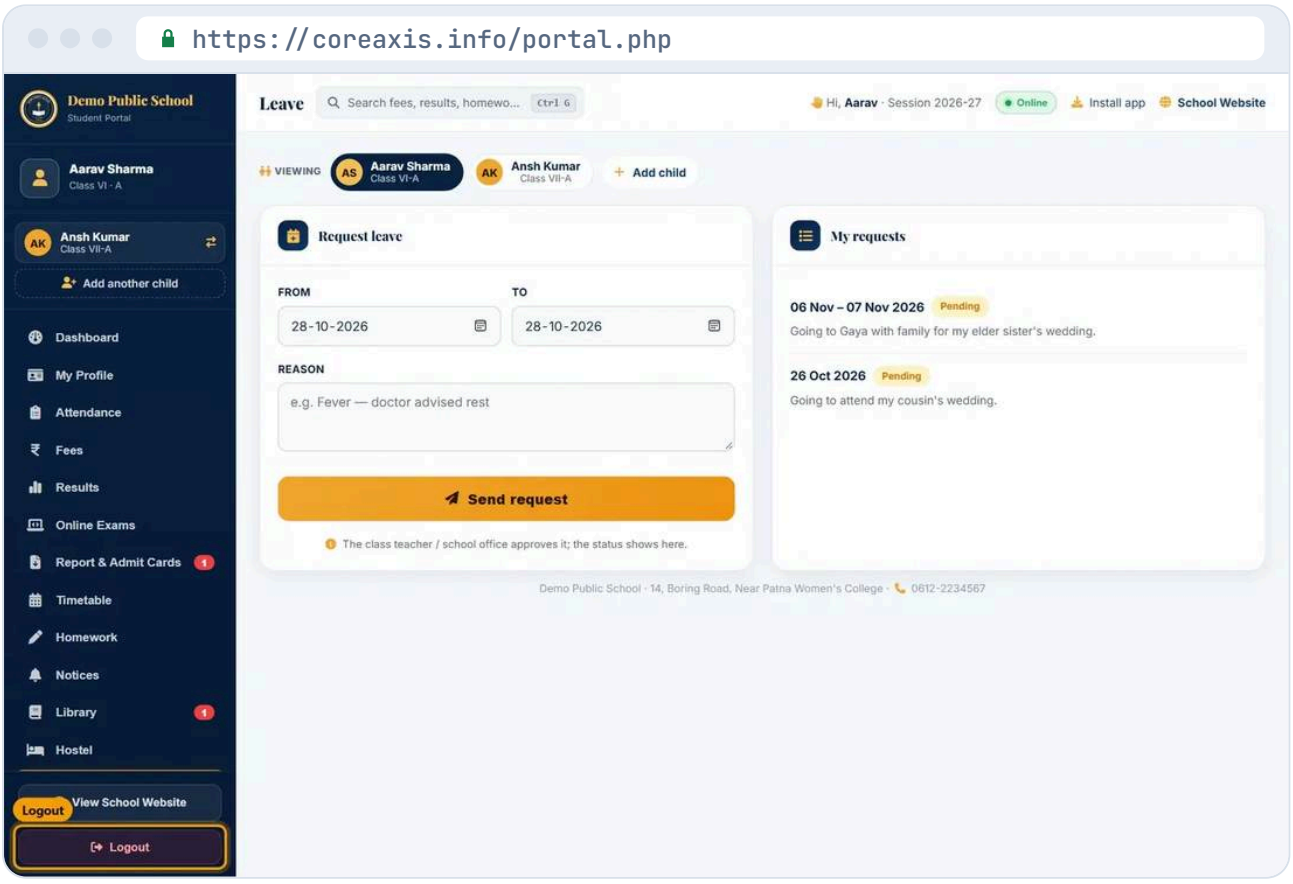
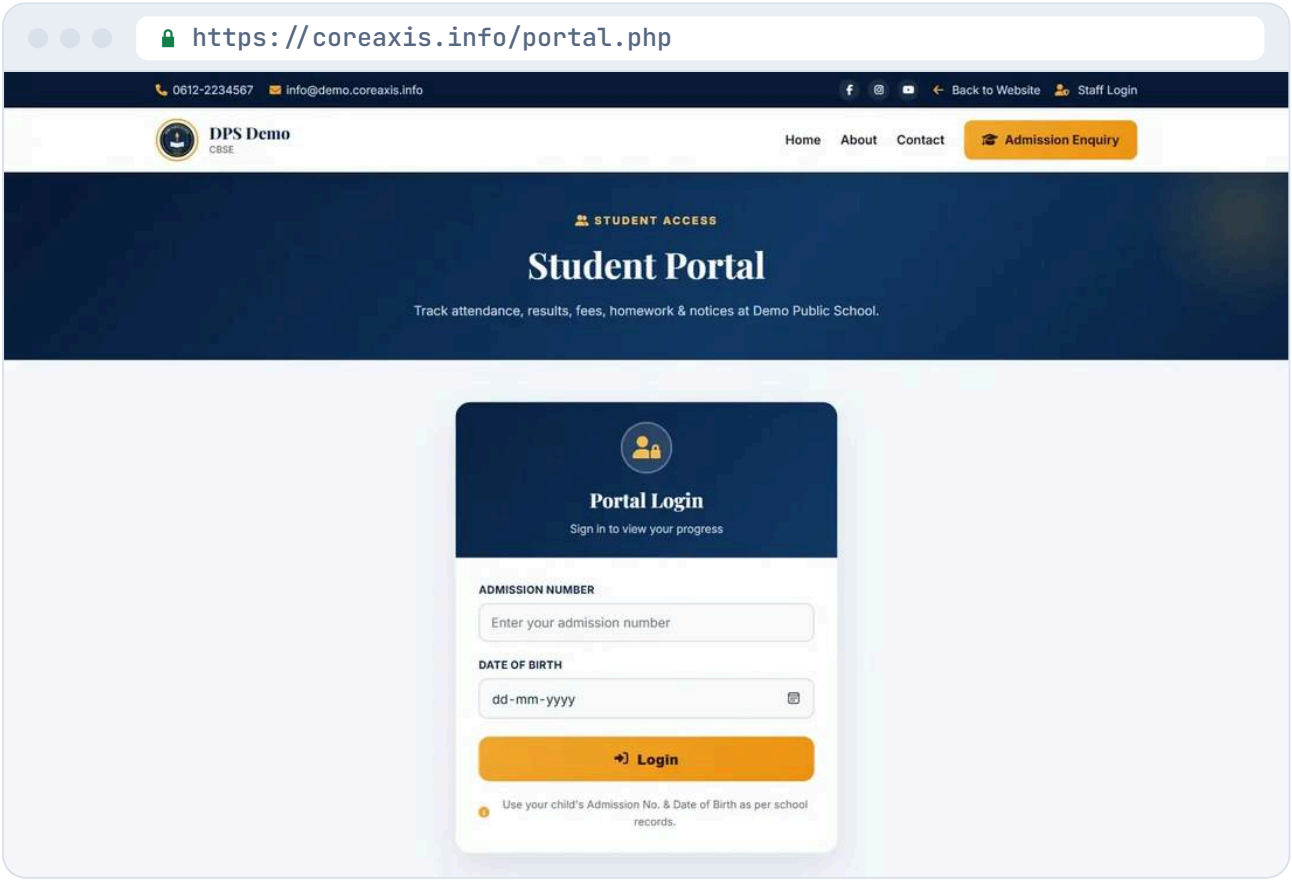
Sign out

1. Click **Logout** at the bottom of the left menu (on a phone: More › Logout) and confirm.



2 The Portal Login page opens. Copies of the pages kept on the device for offline use are cleared.



Signed out: the login form is shown again.

TIP Always sign out on a shared or cyber-café computer. Logout signs out every child added in that sign-in.

Questions

The portal says "Invalid Admission No or Date of Birth".

Check the admission number on a fee receipt or ID card and the date of birth as given at admission. If they are correct, the school office must correct the record.

I paid by UPI but the balance has not changed.

The balance changes when the office verifies the payment and makes the receipt. Until then the payment shows under My UPI / Bank Payments as School is checking.

I typed a wrong UTR.

Contact the school office. The office will reject the wrong claim with a reason; then send the correct UTR again.

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My child's result is not showing.

Results and report cards appear only after the school publishes the exam.

The online test closed while my child was answering.

The test is submitted automatically when time runs out; the answers given till then are marked. Ask the class teacher if there was a technical problem.

Can I change the phone number or address?

No. Contact details are kept by the school office. Ask the office to update them.

I sent a UPI payment. Why does Pay by UPI now show ₹0?

The school is still checking your payment and it covers the dues. The portal takes payments being checked off the amount to pay, so the same fee is not paid twice. Once the office verifies it, the receipt appears in Payment History.

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