School Dynamics

The manual
A to Z

Every part of School Dynamics, step by step, with real screens from the demo school.

14	123	122	Nov 2026
CHAPTERS	LESSONS	SCREENS	EDITION

Edition of 11 November 2026. The latest version, with search and questions answered by the team, is at app.schooldynamics.ug/help.

Screens show the demo school: every name and figure is invented. © 2026 Newline Technologies Limited, Kampala.

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01

Start here

Sign in, find your way round, and learn how School Dynamics is organised — for everyone, on the first day.

Read this chapter first, whatever your job. It shows how to sign in, how the menu and the top bar work, how to find any student or receipt in a second, and who can do what. Everything after it builds on these few pages.

Welcome to School Dynamics	4 min
Sign in and sign out	5 min
Find your way round	5 min
Your profile, password and devices	5 min
Who can do what	4 min
The School Dynamics phone app	3 min
Get help	3 min

CHAPTER 1 · START HERE

Welcome to School Dynamics

What School Dynamics does, how this manual is organised, and how to use its pictures, steps and guides beside the page you are on.

For: Everyone · app.schooldynamics.ug/help/start-here/welcome

School Dynamics runs a school's daily work in one place: students and classes, roll-calls, marks and report cards, fees and receipts, the school's spending and buying, messages to parents, staff, and boarding and facilities. Staff use it in a web browser and in the School Dynamics phone app. Parents have their own page and the same app.

This manual teaches it one job at a time, in plain words, with pictures of the real pages.

How the manual is organised

The menu on the left of every page follows the way a school day runs. Each part of the menu has its chapters here:

Menu section	Chapters
Teaching & learning	Students, Attendance, Marks and report cards, Teaching
Fees & finance	Fees, School finance, Procurement
School life	Messages and notices, Boarding and facilities
Administration	Setting up your school, Staff

Three chapters stand apart: **Start here** (this one, for everyone), **Parents** (for parents and the staff who help them) and **Leaders and owners** (the dashboard, alerts and groups of schools).

Where to start

Read this chapter first, whatever your job. Then go to the lessons for your work:

You are	Start with
Head teacher or owner	The dashboard, then Alerts
Director of studies	The term at a glance
Bursar	How fees work, then Recording a payment
Teacher	Entering marks and Taking a roll-call
Secretary	Admitting a student and Sending a message
Setting up a new school	The first-week checklist
Parent	What parents can do

Learning paths put the lessons for one job in the order you will need them: head teacher, director of studies, bursar, teacher, secretary, parent and school owner.

How a lesson works

Each lesson is one job, named the way you would say it: *Record a payment*, *Make the report cards*. At the top it says who it is for and how long it takes to read.

- **Before you start** says what must be true first: who may do it, and what must be set up.
- **Numbered pictures.** Numbered boxes on a picture point at the buttons and boxes the lesson talks about. The small numbers in the text match them: point at one, or tap it, and its box lights up. The button in a picture's corner shows it larger.
- **Steps** are numbered, one action each. Steps you follow once, such as setting something up, have boxes you can tick as you go.
- **Boxes.** *Tip* is a quicker way or a good habit. *Careful* is about money, deleting or sending texts: things that cannot be undone. *Good to know* says why it works that way.
- **School Dynamics words**, such as term switch or quick view, are underlined. Point at one, or tap it, to see what it means. Every word is also in the glossary.
- **Common questions** are answered at the end.

> GOOD TO KNOW
>
> The pictures come from the demo school, which is filled with invented Ugandan names and figures. Nothing in them belongs to a real school.

Reading the manual inside School Dynamics

Help & manual, at the foot of the menu, opens the manual for you:

- **Continue where you left off**, and how many lessons you have learned;

- **Your path**: the lessons for your job, in order. **Another path** shows the others;
- **Set for you by your school**: lessons your school's leaders asked you to read;
- every chapter, and the **Glossary**.

On any page, open **Help** in the top bar:

- **Guide for this page** opens the lessons about the page you are on in a panel beside it, so you can follow the steps without leaving your work. **Show me here** walks you through the page itself.
- **The manual** opens the manual's first page.

In a lesson:

- **Open this page** opens the real page, if your role may use it.
- **Show me on the page** opens the page and points at each part, one by one. Under a picture, **Show me this on the page** does the same for that picture.
- **Mark as learned** keeps track of what you have read. Steps you tick stay ticked.
- **Was this lesson helpful?** Press **Yes** or **No**: it tells the School Dynamics team which lessons to improve.
- **Ask the School Dynamics team**: type a question under the lesson and press **Send the question**. The answer shows on the lesson.

For leaders

People who see the staff list (the school administrator, head teacher, deputy, director of studies and bursar) can also:

- press **Add your school's note to this lesson** to pin a note of your own to it, such as *At our school, the bursar approves every refund*. Only your school sees it;
- open **Staff training** from the manual's first page, set lessons for a member of staff or for everyone with a role, and see who has learned them.

In the demo school you can read and tick, but not ask questions or write notes.

On paper

Print this lesson, beside a lesson's contents, prints it with its pictures and their numbered marks. A chapter's page has **Print the chapter**. When the PDFs have been made, **This chapter as a PDF** and **The whole manual (PDF)** download them, to print or to share with a new member of staff.

Next

Go on to Sign in and sign out, then Find your way round.

QUESTIONS

Are the names and figures in the pictures real?
No. Every picture is taken from the demo school, which is filled with invented names and figures. Your school's pages look the same, with your own students and figures.

Do I have to read the whole manual?

No. Read this chapter first, then only the lessons for your job. Each lesson is one job, such as recording a payment, and stands on its own.

Can I print a lesson?
Yes. Press **Print this lesson** beside the lesson's contents. A whole chapter prints from **Print the chapter**, and the manual also comes as a PDF.

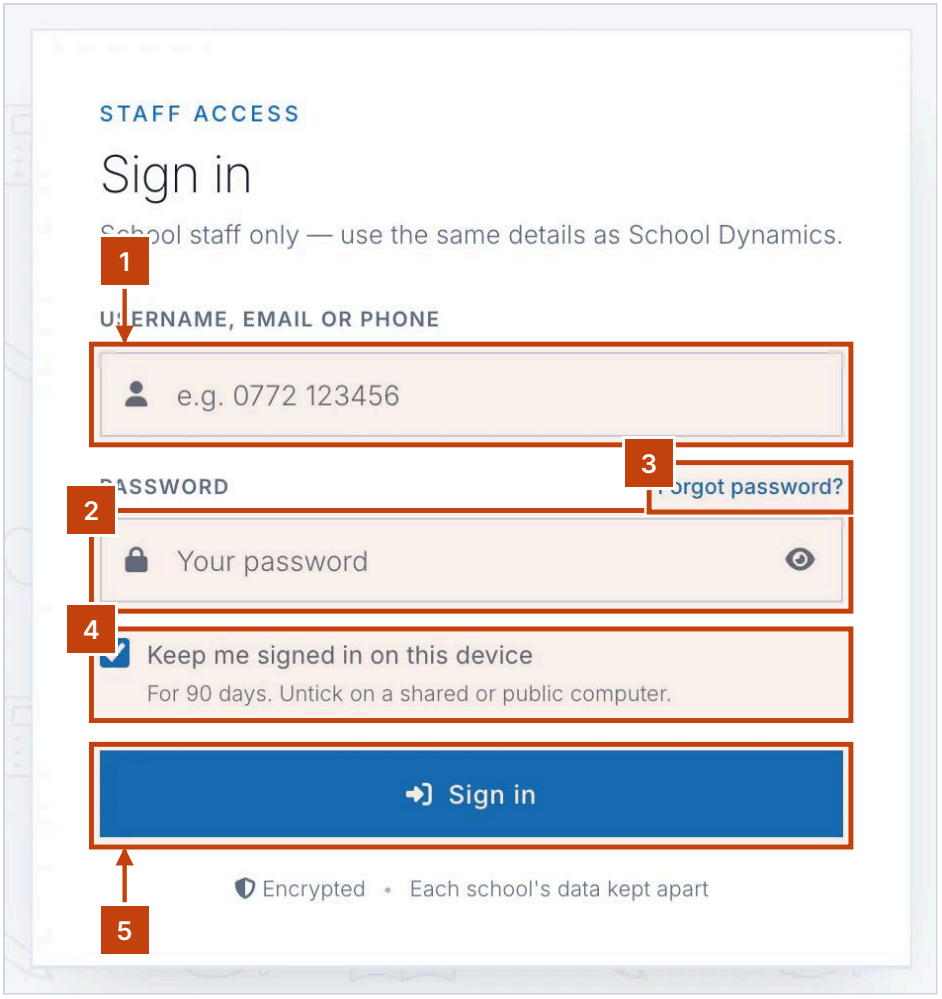
Sign in and sign out

Sign in with your username, email or phone, use two-step sign-in, get a new password when you forget it, choose your own the first time, and sign out.

For: Everyone · app.schooldynamics.ug/help/start-here/signing-in

Every member of staff signs in with their own details. What you see afterwards depends on your roles (see Who can do what).

Sign in



The demo school · invented names and figures

1. Your username, email address or phone number.
2. Your password. The eye button shows what you typed.
3. Forgot it? Get a link to set a new one.
4. Keep this ticked on your own computer. Untick it on a shared one.
5. Sign in.

1. Open School Dynamics in your browser: **app.schooldynamics.ug**, or your school's own web address.
2. In **Username, email or phone** 1, type your username, your email address or your phone number. Any usual way of writing the number works (0772 123456, +256 772 123456).
3. Type your **Password** 2. Press the eye to check what you typed.
4. Leave **Keep me signed in on this device** 4 ticked on your own computer: it stays signed in for 90 days. Untick it on a shared or public computer.
5. Press **Sign in** 5. The dashboard opens, or the page you were going to.

When it does not let you in

You see	What to do
These credentials do not match our records.	The name or the password is wrong. Check both, or press **Forgot password?** 3.
Quick check — type the characters in the picture	After two wrong tries the page asks for the characters in a small picture. Type them and try again.
Too many login attempts. Please try again in ... seconds.	Five wrong tries in a row. Wait that long, then try again.
This account is not active. Please contact your school administrator.	Your account was switched off. Only the school can switch it back on.

Under the form, **Trouble signing in?** opens WhatsApp to School Dynamics support.

The first time: choose your own password

If the school gave you the default password, School Dynamics lets you in only as far as **My profile**. It says *Choose your own password to carry on.*

1. Type the default password in **Current password**.
2. Type a password of your own, at least 4 characters, in **New password** and again in **New password again**.
3. Press **Change password**. The rest of the system opens.

You cannot keep the default password: many people know it.

Two-step sign-in

If you use two-step sign-in, the page **Enter your code** opens after your password.

1. Open your authenticator app and find **School Dynamics**.
2. Type the six-digit code it shows in **Code**.
3. On your own computer or phone, you may tick **Don't ask for a code on this device for ... days**. Never tick it on a shared one.
4. Press **Continue**.

Phone not with you? The links under the form give two other ways in:

- **Text me a code instead**, then **Text me a code**: a code goes by text to the phone number on your record. It works for 10 minutes. **Send another code** asks again after a minute.
- **Use a recovery code**: type one of the ten recovery codes you saved. Each works once.

After five wrong codes the page sends you back to sign in again. The code page also gives up after 10 minutes: *Your sign-in timed out. Sign in again.*

To turn two-step sign-in on, see Your profile, password and devices.

Asked to turn it on

The school's owner, the school administrator, the head teacher and the bursar must use two-step sign-in. Until they turn it on, a page **Turn on two-step sign-in** opens each time they sign in. **Not now** puts it off until the date the page shows. After that date it is the only way on.

Forgot your password

1. On the sign-in page, press **Forgot password?**
2. Type your username, email or phone in **Username, email or phone**, and the characters in the picture.
3. Press **Email me a reset link**.
4. Open the email and press its link. It works for one hour.
5. On **Set a new password**, check your **Email address**, then type your new password in **New password** and again in **Confirm new password**.
6. Press **Reset password**. The sign-in page opens and says *Your password has been reset.* Sign in with the new password.

The link goes only to the email address on your account. The page gives the same answer whether or not it found you, so it never tells anyone who has an account.

No email address on your account? Ask the school administrator. They choose **Set a new password** in your row's menu on the **Staff** page.

> GOOD TO KNOW
>
> A new password signs you out everywhere else: every other browser, the app on your phones, and the devices remembered for two-step sign-in. This keeps someone who knew the old password out.

From the phone app

The School Dynamics app can open the web in your phone's browser already signed in, with no password to type. Its link works once, for two minutes. If you use two-step sign-in and this browser is not remembered for it, you still type a code.

A link that was already used, or is older than two minutes, shows *This link has ended*. Open the web from the app again, or press **Staff sign in**. See The School Dynamics phone app.

Sign out

Press **Sign out** at the foot of the menu, or open your name at the top right and press **Sign out**. The sign-in page says *You have been signed out.*

This signs out this browser only. To sign out your other computers and phones, use **Sign out everywhere else** on My profile.

> CAREFUL
>
> On a shared computer, always sign out when you finish, and untick **Keep me signed in on this device** when you sign in.

If the licence has expired

When the school's licence is unpaid past its date, every page leads to one that says *(your school)'s licence has expired*. The school's records are safe; nothing is lost.

- The people who handle the bill (the school administrator, bursar, finance officer, head teacher and deputy) see the invoice: the amount, the due date and how many days it is overdue. Depending on the school, they can press **Pay UGX ...**, or **How to pay** and **I have paid**, and open **Invoice PDF** or **Payment link**.
- Everyone else sees who to speak to at the school.

Once the bill is paid, the system opens again on its own. It may take a few minutes. See Licence and billing.

QUESTIONS

Is my password the same in the phone app?
Yes. You sign in to the School Dynamics app with the same details as on the web. A new password works in both at once.

Why was I signed out on my other computer?
Choosing a new password signs you out everywhere else: other browsers, the app on your phones and the devices remembered for two-step sign-in. Sign in there again with the new password.

I have a new phone and no codes. How do I get in?
Use one of your recovery codes (**Use a recovery code** on the code page). If you have none left, ask the school administrator to reset your two-step sign-in. Nobody can reset their own.

The sign-in page shows my school's name and logo. Is that right?
Yes. On your school's own web address, the sign-in page wears your school's name and colours. The details you type are the same.

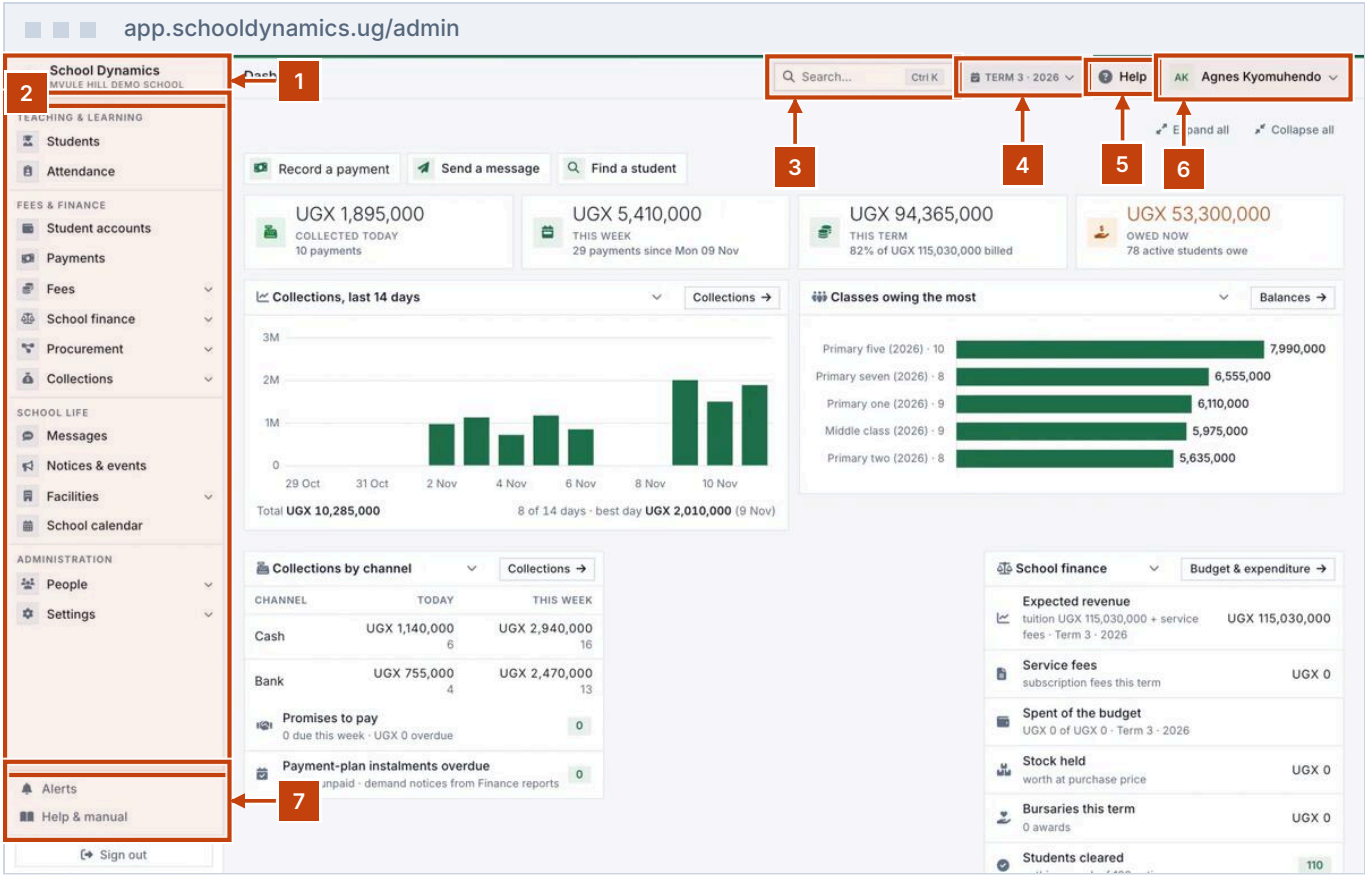
CHAPTER 1 · START HERE

Find your way round

The menu, the top bar, the term switch, search with Ctrl+K, quick views and row menus: how every page of School Dynamics works.

For: Everyone · app.schooldynamics.ug/help/start-here/finding-your-way

Every page of School Dynamics has the same frame: the menu on the left, the top bar above, and the page itself. Learn them once and every module works the same way.



The demo school · invented names and figures

1. The school's name and logo: they open the dashboard.
2. The menu: only the pages your roles may use.
3. Search and go (Ctrl+K).
4. The term you are looking at.
5. Help and support.
6. Your account: My profile, light or dark, Sign out.
7. Alerts, with how many are open, and Help & manual.

The menu

The menu 2 lists the pages you may use, in the order a school day runs:

- **Teaching & learning**: students, attendance, marks and report cards, teaching.
- **Fees & finance**: student accounts, payments, fees, school finance, procurement and collections.
- **School life**: messages, notices and events, facilities, the school calendar.

- **Administration**: the school's structure, people and settings.

A name with an arrow, such as **Marks & reports**, is a group: click it to open or close its pages. Only one group is open at a time.

You see only what your roles allow, and only what fits your school: **Theology marks** only in a school with theology classes, **Competency reports** only in secondary schools. See Who can do what.

- The school's name and logo at the top 1 open the dashboard.
- **Alerts** 7 at the foot shows how many alerts are open for you. See Alerts.
- **Help & manual**, under it, opens this manual (see Welcome).
- **Sign out** is at the very bottom.

On a phone, the menu is hidden. Press the button with three lines at the top left to open it.

The top bar

From left to right:

- The name of the page you are on.
- **Search...** 3: search and go (below).
- **The school switch**, only for people who work in more than one school of a school group.
- **The term switch** 4 (below).
- **The SMS wallet**, for people who send messages: signal bars, like a phone's, and the credit left. Press it for the details. See How SMS works.
- **A licence notice**, for the people who handle the bill, when an invoice is due.
- **Help** 5: **Guide for this page** (the lessons about the page you are on), **The manual**, and WhatsApp, a call or an email to support. See Get help.
- **Your name** 6: **My profile**, light or dark, compact or comfortable spacing, and **Sign out**. See Your profile.

Look at another term

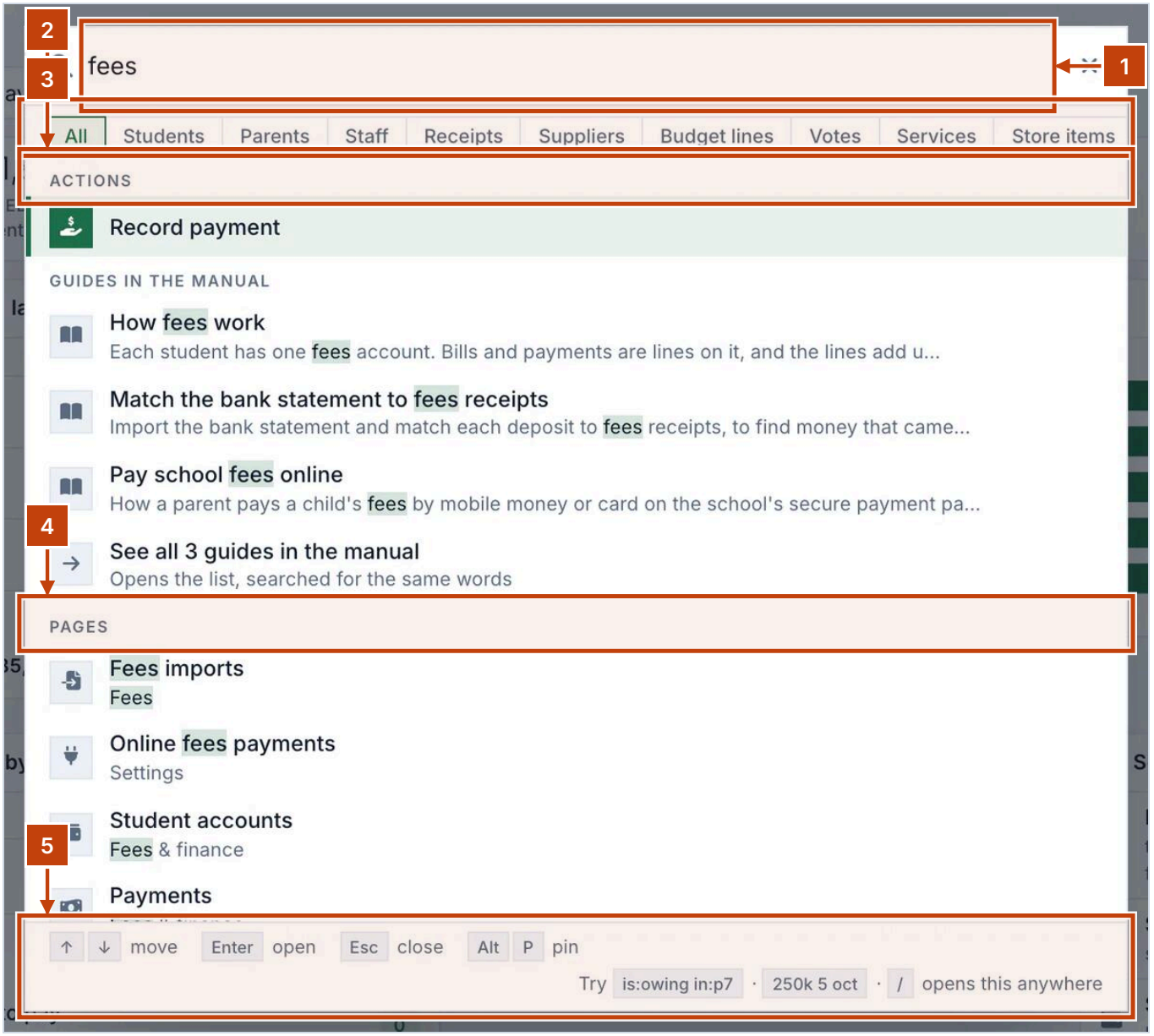
Marks, report cards, fees and finance reports show one term at a time: the school's active term, unless you choose another with the term switch.

1. Press the term in the top bar.
2. Choose a term. The terms are listed by year; the school's active term says **Active**.
3. The page now shows that term. The button says **Viewing ...** and its icon changes, so you do not forget.
4. To go back, open it again and press **Back to the active term**.

> **GOOD TO KNOW**
>
> The term switch changes only what *you* look at. New work (payments, marks, roll-calls) always goes to the school's active term, and nobody else's view changes.

Search and go (Ctrl+K)

The quickest way to anything. Press **Search...** in the top bar, or `Ctrl` + `K` (`Cmd` + `K` on a Mac), or `/` on any page when you are not typing in a box.



The demo school · invented names and figures

1. Type a name, a class, a code, a phone number or a page.
2. Look in one kind of record only.
3. Actions: start a job straight away.
4. Pages of your menu that match.
5. The keys: arrows to move, Enter to open, Esc to close.

Type 1 and the results appear as you type:

- **Records**: students, parents, staff, receipts and classes, and also suppliers, budget lines, votes, services, store items, library books and subjects. You see only the kinds your role may see. Search by name (any spelling), class, admission number, SchoolPay code, phone number or receipt number.
- **Actions** 3 : **Record payment**, **Record a promise to pay**, **Enter marks**, **Print report cards**, **Take attendance** and **Send a message**, each only for the roles that may.
- **Pages** 4 : every page of your menu, also by everyday words (type *debtors* for student accounts, *salaries* for payroll).

A student shows what they owe (*Owes UGX 250,000*, *Cleared*). A name spelt another way is marked **close match**.

Move with the arrow keys and press Enter to open 5 . Ctrl + Enter opens a page in a new tab. Esc closes the box.

Some results have buttons of their own: a student's **Fees account** and **Record payment**, a receipt's **Print receipt**, a class's **Enter marks** and **Print report cards**.

Search tricks

- **Look in one kind only.** Press a chip 2 (**Students**, **Receipts** ...), or start with the kind: `students: nakato` , `receipts: 4512` .
- **Students who owe, in one class.** `is:owing in:p7` . Other words after `is:` are `cleared` , `credit` , `boarder` , `day` , `active` and `left` .
- **A payment by amount and day.** `250k 5 oct` finds payments of UGX 250,000 on 5 October.
- **Pin** a record you open often: the pin button on its result, or Alt + P . With nothing typed, the box shows your **Pinned** records, then **Recent** ones and **Recent searches**, then **Actions**.

Quick views and row menus

Lists do not send you away to another page. Click a record's name, or the eye button at the end of its row, and a quick view opens over the list: the record's main figures, its facts, its latest activity and its buttons. Close it with the × or Esc and you are back where you were in the list.

The button with three dots at the end of a row is its row menu: the actions for that one record, such as **Set a new password** on a member of staff.

Adding and changing records happens in dialogs too. The main button of a dialog says what it does (**Add stream**, **Send 2 messages**). After it is done, the list updates in place and a short message says what happened. Anything that deletes asks you to confirm first. Anything that costs money or touches many records shows what will happen before you press its button.

While a page works

- **Loading...** covers the screen while a page is on its way. If it takes long it says *Still working — this is taking longer than usual.* and offers **Cancel**.
- **Long jobs**, such as printing a class's report cards, an import or a big send, show a box with a progress bar. It keeps going while you work on other pages, and ends with **Download** or a link to the result.

- **No connection?** A bar says *You're offline — changes can't be saved until the connection returns.* Wait for it to go before saving.

QUESTIONS

A page I need is not in my menu. Why?
The menu shows only the pages your roles may use, and only those that fit your school. Ask the school administrator to change your roles. See Who can do what.

I chose last term in the top bar. Do new payments go to last term now?
No. The term switch changes only what you look at. Payments, marks and roll-calls you record still go to the school's active term.

How do I get back to the dashboard?
Click the school's name and logo at the top of the menu.

Does search find a student whose name I spell differently?
Usually, yes. Names spelt another way (Mohammed, Muhammad) or one or two letters off are shown with **close match**.

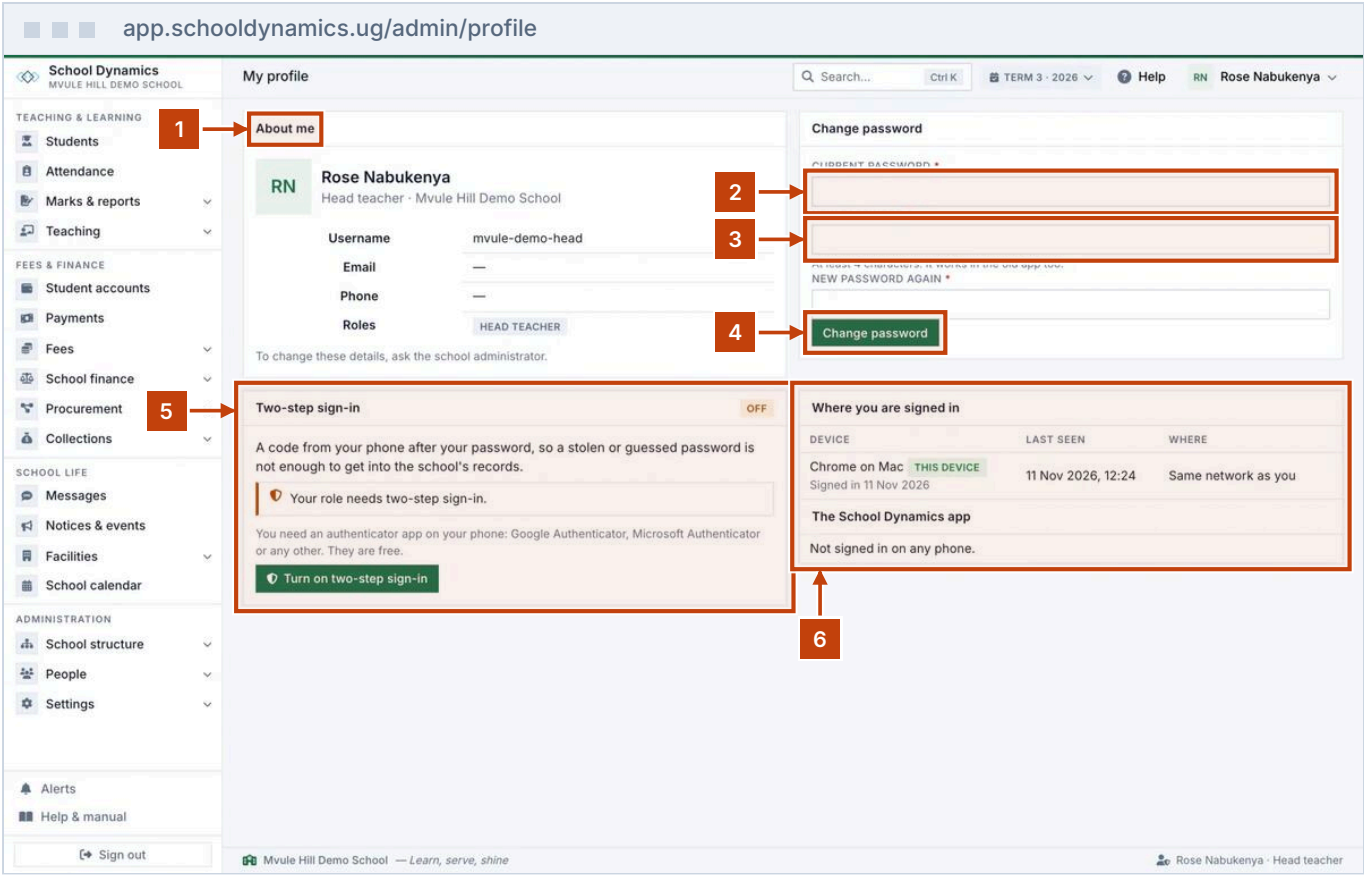
CHAPTER 1 · START HERE

Your profile, password and devices

My profile: your details, a new password, two-step sign-in and recovery codes, where you are signed in, and light or dark.

For: Everyone · app.schooldynamics.ug/help/start-here/your-profile

My profile is your own page: who you are in the school, your password, two-step sign-in and the devices you are signed in on. Open it from your name at the top right › **My profile**.



The demo school · invented names and figures

1. Your details. To change them, ask the school administrator.
2. Your password now.
3. Your new password: at least 4 characters.
4. Saves it, and signs out your other devices.
5. Two-step sign-in: on or off, and your recovery codes.
6. Every browser and phone where you are signed in.

About me

The first card 1 shows your name, your role and school, your username, email, phone and roles. *To change these details, ask the school administrator.* They change them on the Staff page (see Staff and their accounts).

Change your password

1. Type your password now in **Current password** 2.
2. Type the new one in **New password** 3: at least 4 characters. It works in the old School Dynamics too.
3. Type it again in **New password again**.
4. Press **Change password** 4. A message says *Password changed. Other devices are signed out.*

You stay signed in here. Every other browser, the app on your phones and the devices remembered for two-step sign-in are signed out, and need the new password.

You see	Why
That is not your current password.	The first box is wrong.
Choose a password different from the current one.	The new password is the old one.
That is the default password. Choose your own.	The default password cannot be chosen again.
The two new passwords do not match.	The second box differs from the first.
Too many tries. Wait a minute and try again.	Five wrong current passwords in a row.

Turn on two-step sign-in

With two-step sign-in, your password alone does not open your account: you also type a six-digit code from your phone. You need an authenticator app on your phone, such as Google Authenticator or Microsoft Authenticator. They are free.

1. In the **Two-step sign-in** card 5, press **Turn on two-step sign-in**.
2. In your authenticator app, add an account and scan the square code on the screen. Cannot scan? Type the key shown under it instead.
3. Type the six digits the app now shows in **Code from the app**.
4. Press **Turn it on**.
5. **Your recovery codes** opens with ten codes. Press **Print**, or write them down, and keep them somewhere safe. They are shown only now.
6. Press **I have saved them**.

From now on, School Dynamics asks for a code after your password on any device not remembered for it. See Sign in and sign out.

> ⚠ CAREFUL
>
> Keep your recovery codes away from your phone, on paper in a safe place. If you lose the phone and the codes, only the school administrator can let you in again.

Who must use it

The school's owner, the school administrator, the head teacher and the bursar must use two-step sign-in: their roles look after the school's money, staff or records. Their card says *Your role needs two-step sign-in* and the date to turn it on by. After that date, School Dynamics asks for it before anything else. Everyone else may turn it on.

Recovery codes and turning it off

When two-step sign-in is on, the card says how many of the 10 recovery codes are left.

- **New recovery codes**: type a code from your app and press **Make 10 new codes**. The old ones stop working. Do this when few are left.
- **Turn off**: type your password and press **Turn off**. This button is there only if your role does not need two-step sign-in.

Lost your phone?

Sign in with a recovery code. If the phone number on your record still works on another phone, **Text me a code instead** gets you in too. Then move two-step sign-in to your new phone:

- If your role does not need it: press **Turn off**, then **Turn on two-step sign-in** again and scan the code with the new phone.

- If your role needs it: ask the school administrator. They choose **Reset two-step sign-in** in your row's menu on the Staff page. You sign in with your password alone until you turn it on again with the new phone.

With no recovery code left and no phone, only the administrator's reset gets you in. Nobody can reset their own.

Where you are signed in

The last card 6 lists every browser where you are signed in: the device, when it was last used, and where (*Same network as you*, or another network). Your own says **This device**.

- To sign out one of them, press the sign-out button at the end of its row and confirm.
- **Sign out everywhere else** signs out every other browser and the School Dynamics app on your phones. They will need your password (and code) again. This browser stays signed in.

Below the browsers, **The School Dynamics app** lists the phones where you are signed in to the app. Sign out a phone you no longer have with the button at the end of its row.

Not asked for a code lists the devices you told not to ask for a two-step code. The × at the end of a row makes that device ask again.

> TIP
> After using a computer that is not yours, check this card and sign that browser out.

Light or dark, compact or comfortable



The demo school · invented names and figures

1 My profile.

2 Light, dark, or as your device is set.

3 Compact rows, or bigger ones for a tablet.

4 Sign out of this browser.

Open your name at the top right:

- **Appearance** 2 : **Light**, **Dark**, or **Device** to follow your computer's or phone's own setting.

- **Spacing** 3 : **Compact** fits more on the screen; **Comfortable** gives bigger rows and buttons, easier on a tablet.

The change shows at once and is kept for you, so your other computers show it too.

QUESTIONS

How do I change my name, email or phone number?
Ask the school administrator. They change them on the **Staff** page. My profile shows your details but does not change them.

I lost my phone. What now?
Sign in with a recovery code (**Use a recovery code** on the code page), then on My profile sign the lost phone out of the app. If you have no recovery code left, the school administrator can reset your two-step sign-in.

Does my new password work in the old School Dynamics too?
Yes. The page says so under **New password**. It also works in the phone app.

Can I turn two-step sign-in off?
Only if your role does not need it. For the school's owner, the school administrator, the head teacher and the bursar it stays on.

CHAPTER 1 · START HERE

Who can do what

The school roles, what each one may see and do, the school owner's place, and what to do when a page is not open to you.

For: Everyone · app.schooldynamics.ug/help/start-here/who-can-do-what

What you see in School Dynamics depends on your roles. The menu shows only the pages your roles open, and a page shows only the buttons your roles may press. A person may hold several roles; they can do everything any of them allows.

The school administrator gives roles on the **Staff** page (see Roles and permissions).

Everyone on the staff

Every member of staff, whatever their role, can:

- read **Notices & events**, the **School calendar** and the **School profile**;
- ask for money (**Fund requests**) and for things the school must buy (**Purchase requests**, the **Supplier catalogue**);
- ask for leave, see the **Duty roster**, clock in and out under **Staff attendance**, and see **My payslips**;
- see the **Alerts** meant for them, and their own **My profile**.

The roles

Role	What it opens, beyond what everyone has
School administrator	Everything in the school: settings, staff and their roles, students, marks and report cards, fees and payments, messages, facilities and the school's data. The one thing kept back: deleting a payment, which only the bursar may do.
Head teacher	The whole school's academic side: marks for any subject, report cards, results analysis, the exam timetable, reviewing schemes of work and lesson plans, staff monitoring. Messages and notices, the staff list, approving leave and purchases, approving payroll, the audit log, parents' requests for records, account deletions, and **Check now** on Alerts. Fees and finance: may look, not change. Not admitting students, nor setting up classes and subjects.
Deputy head teacher	As the head teacher, except payroll, account deletions and **Check now** on Alerts.
Director of studies	Years, classes and subjects; admitting students; marks for any subject; report cards; results analysis; the exam timetable; reviewing schemes of work and lesson plans; staff monitoring; the duty roster; hostels; messages and notices; documents and ID cards; the staff list. No fees.
Bursar	Fees, payments and receipts (and deleting a payment), student accounts, school finance, buying and receiving goods, stores, transport, payroll (preparing and paying), the online-payments keys, requirements lists, the canteen and messages. Sees students and the staff list.
Finance officer	Fees, payments, student accounts and school finance, buying, requirements lists and the canteen. Not deleting payments, payroll, stores, transport or messages.
Secretary	Admitting and changing students and parents, documents and ID cards, messages and notices, the school calendar, visiting days, correcting staff attendance, parents' requests for records and parents' consent. Sees classes, timetables and report cards.
Teacher	Marks for the subjects they teach, roll-calls, discipline records and sharing learning resources. Sees students, classes, timetables and report cards. The night roll-call in a dormitory where they are the matron or patron.
Librarian	The library.

Role	What it opens, beyond what everyone has
Store keeper	Stores, receiving goods, requirements lists and the canteen.
Purchaser	Buying, receiving goods, stores and requirements lists.
Nurse	The sick bay. Sees students.
Warden	Hostels, roll-calls and the night roll-call, and visiting days. Sees students.
Receptionist	Visitors at the gate and visiting-day bookings. Sees students.
Security, **Gate keeper**	Visitors at the gate and visiting-day bookings.
Driver	Transport.
Supervisor, **Administrative assistant**, **Marketing agent**, **Staff**	What every member of staff has.

The school's owner

The person who owns the school's account may do everything in the school, whatever roles they hold. They must use two-step sign-in. Owners of several schools can also see them side by side: see School groups.

Rules that hold whatever your role

- A teacher enters marks only for the subjects they teach.
- Nobody approves their own purchase request, or an order they wrote. Nobody decides their own leave, except the school's owner.
- Salaries are private: each member of staff sees only their own payslips.
- A parent never signs in to the staff pages: parents have their own page (see What parents can do).

When a page is not open to you

If you open a page your roles do not include, you see *This page is not open to your account* and *Your role does not include it. If you need it for your work, ask an administrator to change your access.*

A page you may open can still hold buttons you cannot press. For example, a teacher can see The term at a glance for report cards, but only the director of studies and the school's leaders can press its buttons.

> **TIP**
>
> Asking for a role? Say which page and which job you need it for. The administrator can then give the smallest role that does it.

QUESTIONS

Can one person have more than one role?
Yes. A person may hold several roles, for example teacher and director of studies. They can do everything any of their roles allows.

Who gives roles?
The school administrator, on the **Staff** page. See Roles and permissions.

Why can the head teacher see fees but not record a payment?
The head teacher and the deputy may look at fees and finance, not change them. Recording payments is for the bursar, the finance officer and the school administrator.

Can a teacher enter marks for any subject?
No. A teacher enters marks only for the subjects they teach. The head teacher, deputy, director of studies and school administrator may enter any subject.

CHAPTER 1 · START HERE

The School Dynamics phone app

What staff can do in the School Dynamics app, how to get it and sign in, how to open the web from it, and how to sign out a lost phone.

For: Teacher, Head teacher, Director of studies, Bursar, Secretary · app.schooldynamics.ug/help/start-here/phone-app

The School Dynamics app puts the daily work of a school on your phone: roll-calls, marks, your day's lessons, students' details and, for the bursar, the school's money. It works with the same records as the web, by the same rules. What you do in one shows in the other.

Get the app

The app is free from **Google Play** (Android phones) and the **App Store** (iPhone). The **Get the app** page on the School Dynamics website has both store buttons, and a square code to scan from a computer with your phone's camera.

Sign in

Sign in with the same details as on the web: your phone number (or username or email) and your password. If you have no password yet, ask the school's office.

- You see the same things as on the web: only what your roles allow (see Who can do what).
- A new password chosen on the web works in the app at once, and signs the app out on your other phones.
- If the app says you are using the default password, sign in on the web once and choose your own (see Sign in and sign out).

What staff can do in it

What you see depends on your roles, as on the web.

- **Teachers**: take roll-calls, even where there is no network; enter marks for the subjects you teach; see your lessons and duties for the day and your timetable; schemes of work and assignments; write report-card comments as the class teacher.
- **Everyone on the staff**: messages from the school; ask for leave and see what is left; clock in and out; your payslips; ask for money with a fund request.
- **Office and gate**: visitors at the gate, visiting days, transport trips and the night roll-call, for the staff who handle them.
- **Leaders**: the school's figures for today and the alerts; deciding leave requests; report cards by class.
- **The bursar and finance officer**: the term's collections and who owes; a student's account; recording payments and promises to pay; spending, income, creditors, bursaries, payment plans and pocket money.
- **Searching**: students, parents, staff, receipts and classes, as with search on the web.

Open the web from the app

Some work is easier on a big screen, such as printing a class's report cards or the committee reports. The app can open the web in your phone's browser **already signed in**, at the page you choose, with no password to type.

- The link works **once**, for **two minutes**. After that the browser shows *This link has ended*: open it from the app again.
- If you use two-step sign-in and that browser is not remembered for it, you still type a code.
- The web's own rules still apply: you land only on pages your roles open.

Sign out a phone

In the app, sign out from the app itself. To sign out a phone you do not have with you, open **My profile** on the web: **The School Dynamics app** lists every phone where you are signed in, with the last time it was used. Press the sign-out button at the end of its row. See Your profile, password and devices.

Try the demo in the app

Before signing in, the app can also open the demo school, as a head teacher, director of studies, bursar, teacher or parent, with invented names and figures. In the demo you can look at everything, and practise marks and roll-calls. Money, messages and settings are switched off there, because everyone shares it.

For parents

Parents use the same app with their own sign-in, and see only their own children. See The parents' app.

QUESTIONS

Is the app free?
Yes. It is free from Google Play and the App Store, and comes with every school's package.

Do I need a separate account for the app?
No. You sign in with the same details as on the web, and you see the same records.

The app says I am using the default password. What do I do?
Sign in on the web once. School Dynamics opens **My profile** and asks you to choose your own password. Then sign in to the app with it.

My phone was stolen. Can someone open the school's records with it?
Sign that phone out at once: on the web, **My profile** › **The School Dynamics app**, the sign-out button on its row. Choosing a new password also signs out the app on every phone.

CHAPTER 1 · START HERE

Get help

Where to find answers: this manual and the guide for each page, the Help menu (WhatsApp, a call, an email), the contact form, and what to send when something goes wrong.

For: Everyone · app.schooldynamics.ug/help/start-here/getting-help

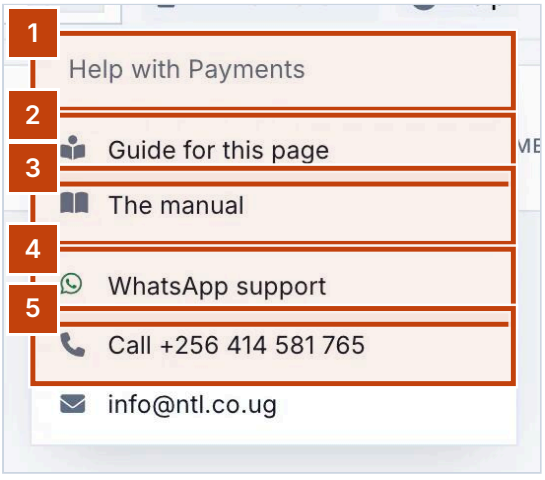
Most answers are in this manual. When they are not, help is one press away on every page.

Look it up in this manual

- **Help & manual**, at the foot of the menu, opens the manual. Search it for the job you want to do: *record a payment*, *release report cards*.
- Each chapter follows a part of the menu (see Welcome). Each lesson ends with common questions.
- Words you do not know, such as quick view, explain themselves when you point at them. They are all in the glossary.
- Still stuck on a lesson? **Ask the School Dynamics team** at the bottom of the lesson. The answer shows on the lesson.

The Help menu

Press **Help** in the top bar, on any page.



The demo school · invented names and figures

1 The page you are on, by its name in the menu.

2 The lessons about this page, in a panel beside it.

3 The whole manual.

4 WhatsApp support, with your school, role and page already written.

5 Call support.

- At the top 1, the menu names the page you are on: *Help with Payments*.
- **Guide for this page** 2 opens the lessons about this page in a panel beside it. **Show me here** in the panel walks you through the page.

- **The manual** 3 opens the whole manual.
- **WhatsApp support** 4 opens WhatsApp with a message already written: *Hello School Dynamics, I am the Bursar at (your school) and I need help with Payments.* Add your question and send it.
- **Call ...** 5 calls School Dynamics support. The email address under it opens a new email.

> GOOD TO KNOW
>
> The written message names only your school, your role and the page, never a student, a parent, marks or a phone number. Whatever else you add is up to you: never send a password, a sign-in code or a recovery code to anyone.

When you cannot sign in

- Press **Forgot password?** on the sign-in page (see Sign in and sign out).
- Under the sign-in form, **Trouble signing in?** opens WhatsApp to School Dynamics support. On a school's own web address it also says to ask that school's administrator.
- Your school administrator can set a new password for you and reset your two-step sign-in.

When something goes wrong

You see	What it means, and what to do
Something went wrong on our side, with a **Reference**	The error was written down for the team. Try again in a moment. If it keeps happening, press **Send to support on WhatsApp**: the message carries the reference, so the team can find exactly what happened.
This page sat open for too long	The page was left open too long and its form expired, for your safety. Press **Go back**, refresh the page and try again. Nothing was saved twice.
This page is not open to your account	Your roles do not include this page. Ask your school administrator (see Who can do what).
You're offline — changes can't be saved until the connection returns.	Your connection dropped. Wait for the bar to go, then save.

Write to the team

The › **Talk to us** page on the School Dynamics website is a form for anything that can wait for an email answer.

1 Type **Your name** and **Email address**.

2. Choose **What is it about?**: starting with School Dynamics, prices and packages, help using School Dynamics, payments and invoices, something not working, or something else.
3. Write **Your message**. If it is about your school's account, say which school.
4. Type the characters in the picture and press **Send message**.

The page gives you a reference. A person from the team replies to your email address, usually within a working day.

What to tell support

A good message gets a quick answer. Say:

- your school and your role;
- the page (its name in the menu) and what you pressed;
- what you expected, and what you saw instead (the exact words, or a screenshot);
- the error's **Reference**, if there was one.

QUESTIONS

Does the WhatsApp message send my students' details?
No. The message names only your school, your role and the page you were on. Add your question, and never send a password or a code.

Who do I ask first, my school or School Dynamics?
Ask your school administrator about your roles, your password and your school's own set-up (terms, classes, fees). Ask School Dynamics about how the system works, errors, licences and invoices.

How fast does School Dynamics reply?
A message from the contact form is answered by a person from the team, usually within a working day, by email.

02

Setting up your school

The school's profile, years and terms, classes, subjects, grading, licence and the settings that keep data safe.

What a school sets once and checks each term: the school's name and logo, the academic year and its terms, classes and streams, subjects and grading. Start with the first-week checklist; it puts the rest in order.

Your first week, step by step	4 min
The school profile, logo and colours	4 min
Academic years and terms	4 min
Classes and streams	3 min
Subjects and their teachers	4 min
Grading scales and the comment banks	4 min
Theology classes	4 min
Programmes and semester enrolment	4 min
Licence and billing	5 min
Data protection and account deletions	5 min
Take a full copy of the school's data	2 min
The audit log	2 min

Your first week, step by step

The order to set up a new school in School Dynamics, from the school's name and logo to its first fees and text messages, with a link to each lesson.

For: School owner, School administrator · app.schooldynamics.ug/help/setting-up/first-week-checklist

This page puts the setting-up lessons in order for a new school. The order matters: classes need a year, subjects need classes, fees need classes and students, and report cards need subjects, marks and a grading scale. Most steps take a few minutes.

Before you start

- You need to be the school's owner (usually the person who signed the school up) or a school administrator. Other staff can look at most settings but cannot change them.
- When your school signed up, School Dynamics already made the first academic year with its three terms, and one class for each level your school teaches, each with its usual subjects. Much of the first week is checking these and correcting them.

The dashboard checklist

A school that signed up sees **Getting your school ready** at the top of its dashboard. It lists most of the steps below and ticks each one by itself, from the school's real data: a step is done when the work is done, not when someone presses a button. Press **Show the steps** to open it, and **Do it** beside a step to go to its page. Only the owner and school administrators see it. **Hide** hides it for everyone at the school.

The first step on that card is **Confirm your email address**: the owner presses **Email me the link** and opens the link in the email.

The steps, in order

1. **Fill in the school profile.** Under **Settings › School profile**, give the school's name, motto, contacts and logo. They print on report cards, receipts and letters. See School profile.
2. **Set the term dates.** A new year's three terms all start with the whole year's dates. Under **School structure › Academic years**, give each term its real start and end, and check which one is the active term. See Academic years and terms.
3. **Check your classes.** Under **School structure › Classes**, check that the school has the classes it teaches this year, and add streams to the classes that have them. See Classes and streams.
4. **Check your subjects.** Under **School structure › Subjects**, check each class's subjects. Remove those your school does not teach and add the ones that are missing. See Subjects.
5. **Add your staff.** Add each member of staff and give them their role (head teacher, director of studies, bursar, teacher…), so they can sign in and see their own pages. See Staff and their accounts and Roles and permissions.
6. **Give classes and subjects their teachers.** Until your staff are in, the school's owner stands as every class teacher and subject teacher. Open each class and choose its class teacher, stream teachers and subject teachers. See Classes and streams.
7. **Add your students.** Add them one by one, or import a spreadsheet of the whole school. See Admitting a student and Importing students.
8. **Set this term's fees.** Set what each class pays, and the system bills every student. See Fee structure.
9. **Set up grading.** Under **School structure › Grading**, start from the default grading scale or make your own, and add the report comments. See Grading scales. The term's report cards then start from The term at a glance.
10. **Set up text messages.** Buy SMS credit and decide which messages the school sends. See How SMS works.
11. **Accept the data processing agreement.** The owner reads and accepts it once for the school, and the office prints the privacy notice for parents. See Data protection.
12. **Choose a package.** Before the free trial ends, choose a package and pay its invoice under **Settings › Licence & billing**. See Licence and billing.

> **TIP**
>
> Do steps 5 and 6 before teachers start entering marks. Teachers enter marks only for the subjects they are named on.

Schools with theology, and universities

- A school that teaches theology turns it on in the school profile (the **Theology** tab), then sets up its theology classes. See Theology classes.
- A university or tertiary school sets up its programmes and enrols students each semester. See Programmes and semester enrolment.

Later on

- Each new year, make the next academic year and promote students into its classes. See Academic years and terms and Changing class and promotion.
- Each term, make the next term active when it starts.
- The school's leaders can read the Audit log at any time, and the owner can take a full copy of the school's data from Data export.

QUESTIONS

Why does my school already have classes and subjects?
When a school signs up, School Dynamics makes its first academic year with its terms, and one class for each level the school teaches, each with the usual subjects. Check them and change what is different at your school.

Where is the checklist on the dashboard?
A school that signed up sees **Getting your school ready** at the top of its dashboard. Only the owner and the school administrators see it. It ticks each step by itself as the work is done.

Can I hide the dashboard checklist?
Yes. Press **Hide**. It is hidden for everyone at the school, and every step stays in the menu.

The school profile, logo and colours

The school's name, motto, contacts, logo and colours, and the names and signatures printed on report cards, receipts and ID cards.

For: School owner, School administrator · app.schooldynamics.ug/help/setting-up/school-profile

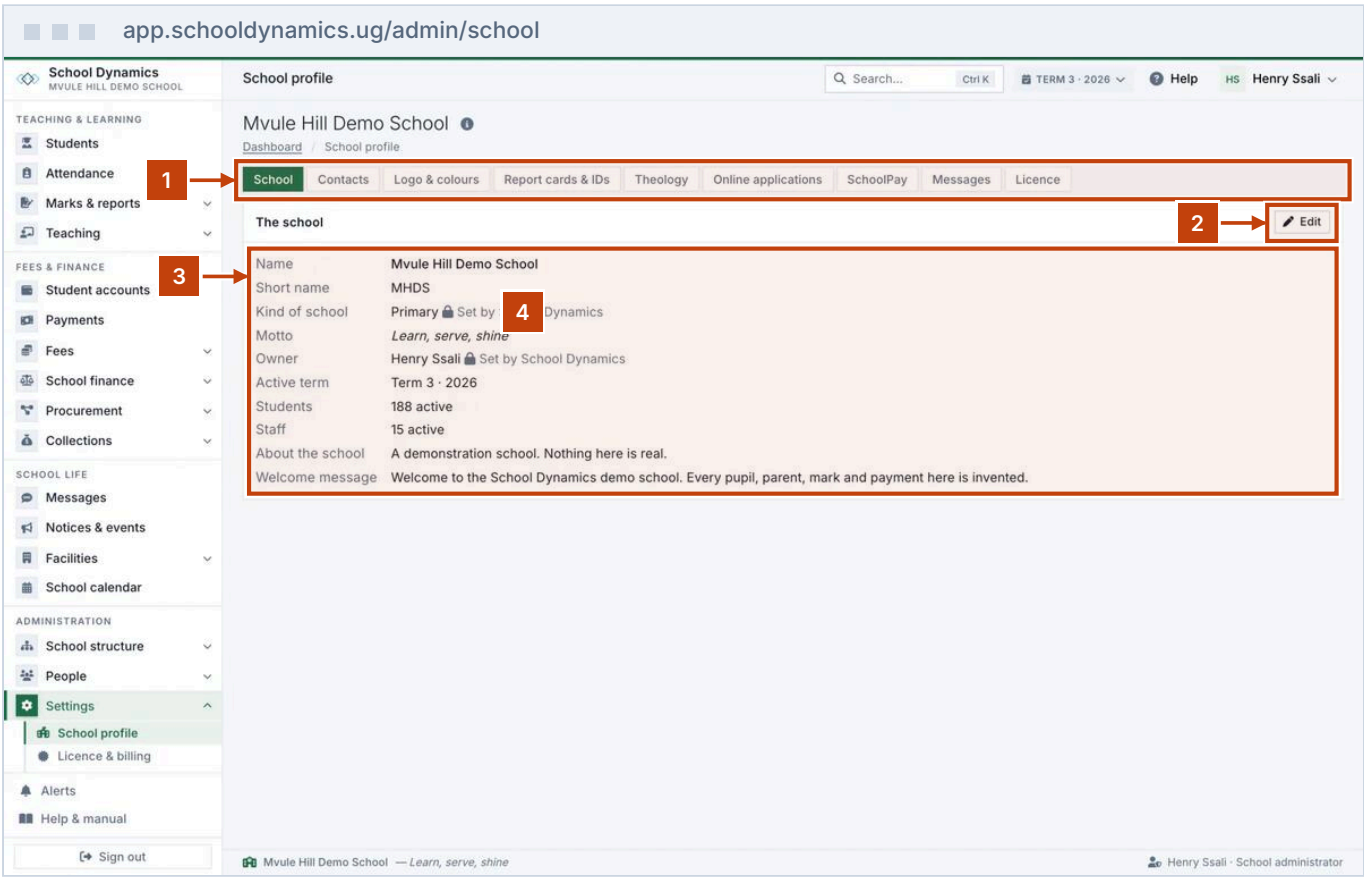
The school profile holds what every page and printed document says about your school: its name, motto, contacts, logo and colours, the head teacher's name and the signatures. Set it in the first week, and change it whenever something changes.

Open it from **Settings › School profile**.

Before you start

- Every member of staff can open the school profile and read it.
- Only the school's owner and the school administrators can change it. They see an **Edit** button on each tab.
- The **SchoolPay** and **Licence** tabs show only to those who can also see the school's money (the bursar, the head teacher and the deputy, among others). The **Messages** tab shows only to those who can send messages.

The tabs



The demo school · invented names and figures

1 One tab for each group of settings. Some tabs show only to the people who deal with them.

2 **Edit** opens this tab's settings. Only the owner and school administrators see it.

3 What is set now. A dash means nothing is set yet.

4 Set by School Dynamics, not by the school.

Each tab 1 holds one group of settings. What is set now is listed under it 3; a dash means nothing is set yet.

Tab	What it holds
School	The name, short name, motto, a few lines about the school and a welcome message. It also shows the kind of school, the owner, the active term and how many students and staff are active.
Contacts	Address, P.O. box, phone, second phone, email and website.
Logo & colours	The logo, the school colour and the second colour.
Report cards & IDs	The head teacher's name, the head teacher's, director of studies' and bursar's signatures, and when ID cards expire.
Theology	Whether the school teaches theology. See Theology classes.
Online applications	Whether parents can apply online, the fee, the deadline and the documents to bring. See Online applications.
SchoolPay	Whether SchoolPay payments are imported by themselves, and from which date. See SchoolPay.
Messages	The school's switch for sending text messages, the SMS wallet and when credit was last bought. See How SMS works.
Licence	Where the school's licence stands. It only shows; the licence is managed by School Dynamics. See Licence and billing.

Some lines say **Set by School Dynamics** 4: the kind of school, the owner and the web address. The school cannot change them, because they decide the school's classes, terms, menus and sign-in. Ask School Dynamics support if one is wrong.

Change a setting

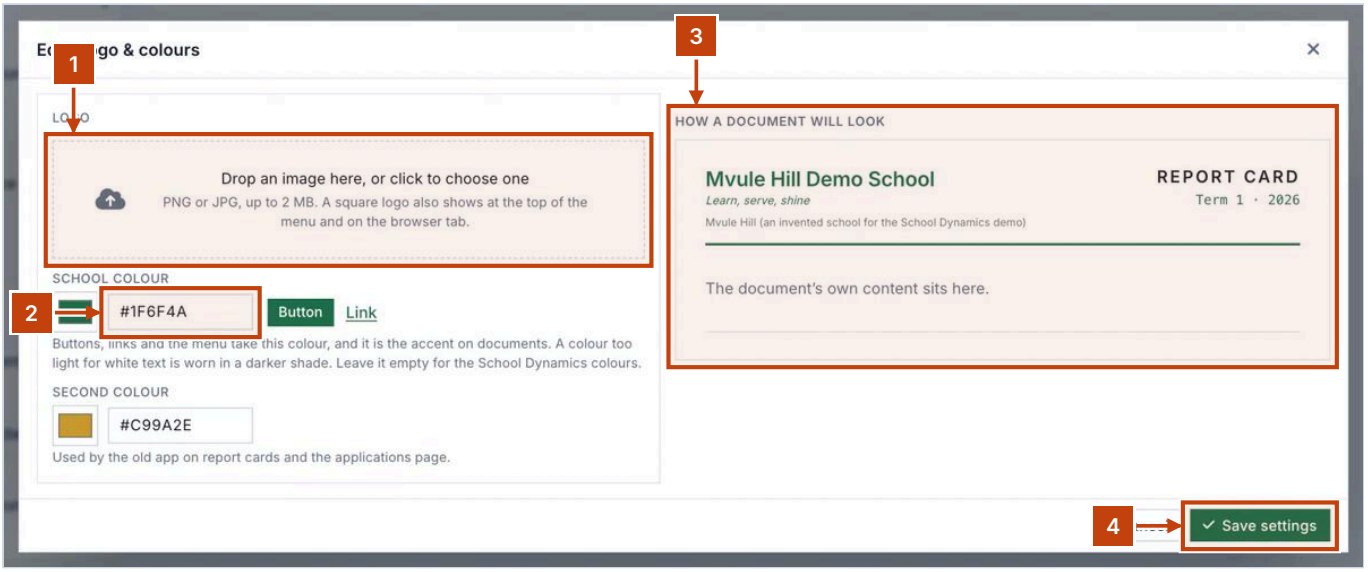
1. Open the tab, for example **Contacts**.
2. Press **Edit** 2. A dialog opens with that tab's settings.
3. Change what you need. Leave a field empty to clear it.
4. Press **Save settings**.

A short note confirms what was saved, for example *Contacts saved.* If nothing was different, it says *Nothing was changed.*

Only the school's name is required. A few rules are checked when you save:

- **Short name**: leave it blank and it becomes the initials of the name, up to five letters.
- **Phone** and **Second phone**: digits and the usual signs only (`+` , spaces, brackets, dashes).
- **Website**: a web address such as *www.school.ac.ug*.
- **Email**: a real email address.

Logo and colours



The demo school · invented names and figures

1 Drop the logo here, or click to choose it: a PNG or JPG of up to 2 MB.

2 The school colour, as # and six letters or digits. The square beside it opens a colour picker.

3 How a document will look with this logo and colour, before you save.

4 Save. The page opens again in the new colours.

The sign-in page, the menu, the footer and every printed document wear the school's logo, colour and motto. Set them under **Logo & colours**:

- **Logo** 1 : drop a picture on the box, or click it to choose one. It must be a PNG or JPG of up to 2 MB. A square logo also shows at the top of the menu and on the browser tab.
- **School colour** 2 : buttons, links and the menu take this colour, and it is the accent on documents. Type it as `#` followed by six letters or digits (like `#1C4795`), or click the square to pick one. A colour too light for white text is worn on the screens in a darker shade; the dialog tells you which. Leave it empty to keep the School Dynamics colours.
- **Second colour**: kept for report cards and the applications page of School Dynamics classic.

The right side 3 shows how a document's heading will look with the logo, colour, name, motto and contacts, before you save. When you press **Save settings** 4 , the page opens again so the menu and footer show the change. The motto is set on the **School** tab.

Names and signatures on documents

Under **Report cards & IDs**:

- **Head teacher's name** is printed beside the head teacher's signature.

- Upload the **head teacher's**, **director of studies'** and **bursar's** signatures: a PNG with a clear background prints best, up to 2 MB. The head teacher's signature is printed on report cards and letters; the bursar's on receipts and finance reports.
- **Student ID cards expire** and **Staff ID cards expire**: the date printed on ID cards. Left blank, it is 31 December of the current year.

To take a signature off the documents, press **Remove** beside it on the tab. Only the owner and school administrators can.

> GOOD TO KNOW
>
> Signatures show as pictures only to the owner, the school administrators and those who run report cards (the head teacher, the deputy and the director of studies). Other staff see only that a signature is *Uploaded*.

What happens when you save

- Every change is written in the school's audit log: who changed which setting, from what to what.
- A new logo or signature is kept as a new file; the old file is not deleted.
- If the school has no academic year yet, saving the profile makes the first one, starting today, with its terms and classes, and the note says so.
- Changing the name, logo, colours or the theology setting opens the page again, so the menu shows the change at once.

QUESTIONS

Who can change the school profile?
The school's owner and the school administrators. Every other member of staff can read it, but sees no Edit buttons.

Can we change the kind of school (primary, secondary) ourselves?
No. The kind of school decides its classes, terms and menus, so only School Dynamics changes it. The same goes for the school's owner, its web address, the SchoolPay code and the licence. Ask School Dynamics support.

I uploaded a new logo. Where is the old one?
Each picture is kept as a new file and the profile points at it; the old file is not deleted. Upload the old one again to go back to it.

The colour I chose looks darker on the screens. Why?
A colour too light to carry white text is worn in a darker shade on the screens, so buttons stay readable. The dialog tells you when this happens and which shade is used.

Academic years and terms

Make the school year, set each term's dates, choose the active term the school works in, and look back at an old term from the top bar.

For: School owner, School administrator, Director of studies · app.schooldynamics.ug/help/setting-up/years-and-terms

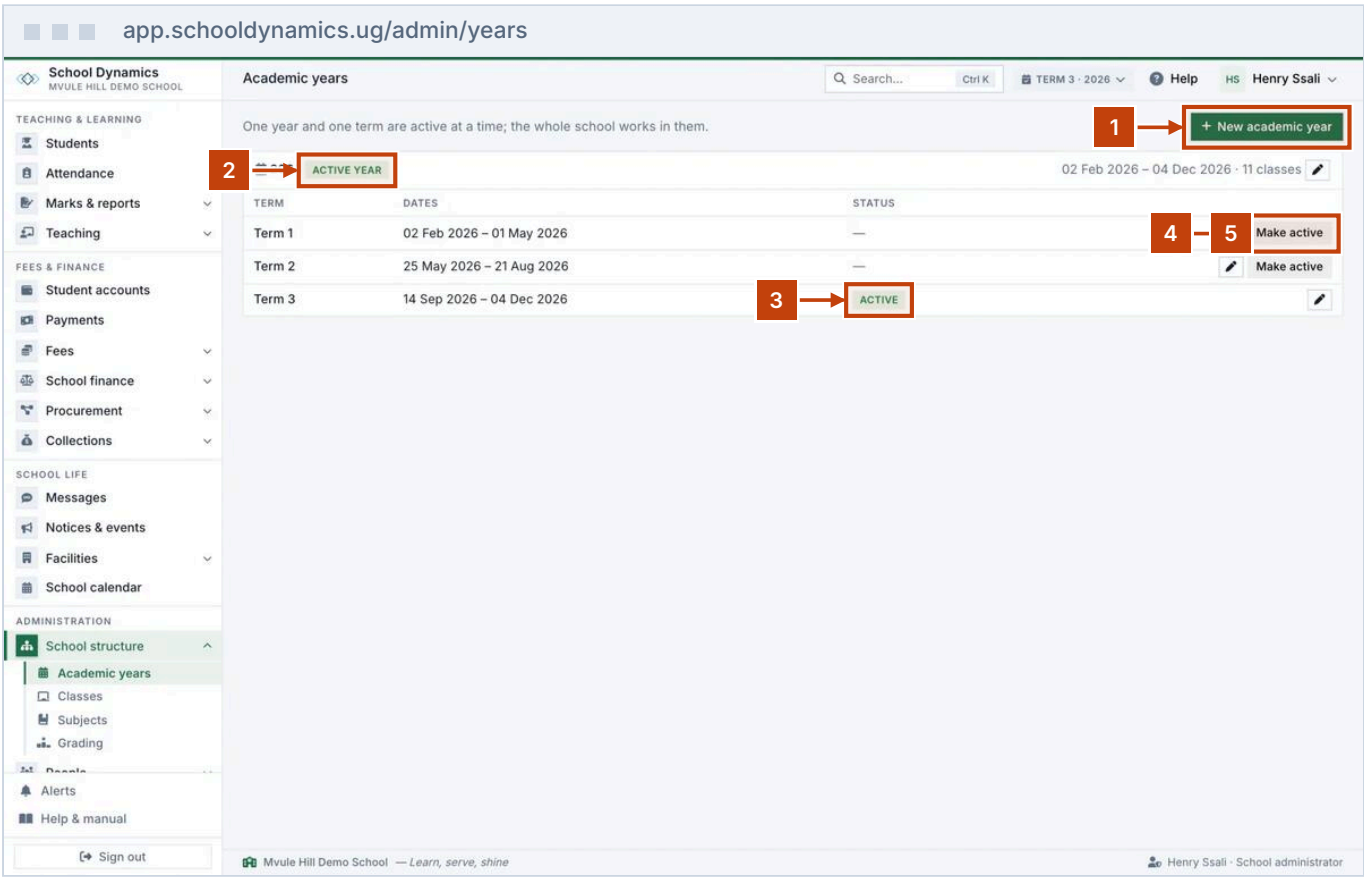
An academic year is the school year, with its own dates, its terms and its classes. One year and one term are active at a time, and the whole school works in them: new bills, payments, roll-calls and the term's report cards go to the active term. You make a new year once a year and change the active term three times a year.

Open it from **School structure › Academic years**.

Before you start

- The school administrator, the head teacher, the deputy, the director of studies, teachers and the secretary can open this page.
- Only the school administrator, the director of studies and the school's owner can make years, change dates or change the active term.

Reading the page



The demo school · invented names and figures

1 Make the next academic year, with its terms and classes.

2 The active year.

3 The active term: the whole school works in it.

4 Make another term the active one.

5 Change a term's name or dates.

Each year is a box, newest first, with its dates and how many classes it has. The active year carries a badge 2, and so does the active term 3 in its table. **New academic year** 1 makes the next year. **Make active** 4 beside a term makes it the active one, and the pencil 5 changes a term's name or dates.

Start a new academic year

Do this before the new year's first term starts, so its classes are ready for promotion.

1. Press **New academic year**. The dialog suggests the next year's name and dates.
2. Check **Name** (for example *2027*), **Starts** and **Ends**. The end must be after the start.
3. Tick **Make it the active year now** only if the school moves into the new year today. Otherwise leave it, and make it active when its first term starts.
4. Type **Your password, to confirm**.
5. Press **Create year**.

The new year gets its three terms and one class for each level the school teaches, each with its usual subjects. The school's owner stands as class teacher until you change it. A university's year gets two semesters and no classes (its classes come from its programmes; see Programmes).

> **TIP**
> The new year's three terms all start with the whole year's dates. Give each term its real dates straight away (below).

Then move the students up into the new classes: see Changing class and promotion.

Set a term's dates

1. Press the pencil beside the term.
2. Give it a **Label** if you want one (for example *Second term*). Left as a number, it shows as *Term 2*.
3. Set **Starts** and **Ends**.
4. Press **Save term**.

Changing a term's label or dates does not change which term is active. To change a year's name, dates or details, press the pencil beside the year's name, then **Save changes**.

Change the active term

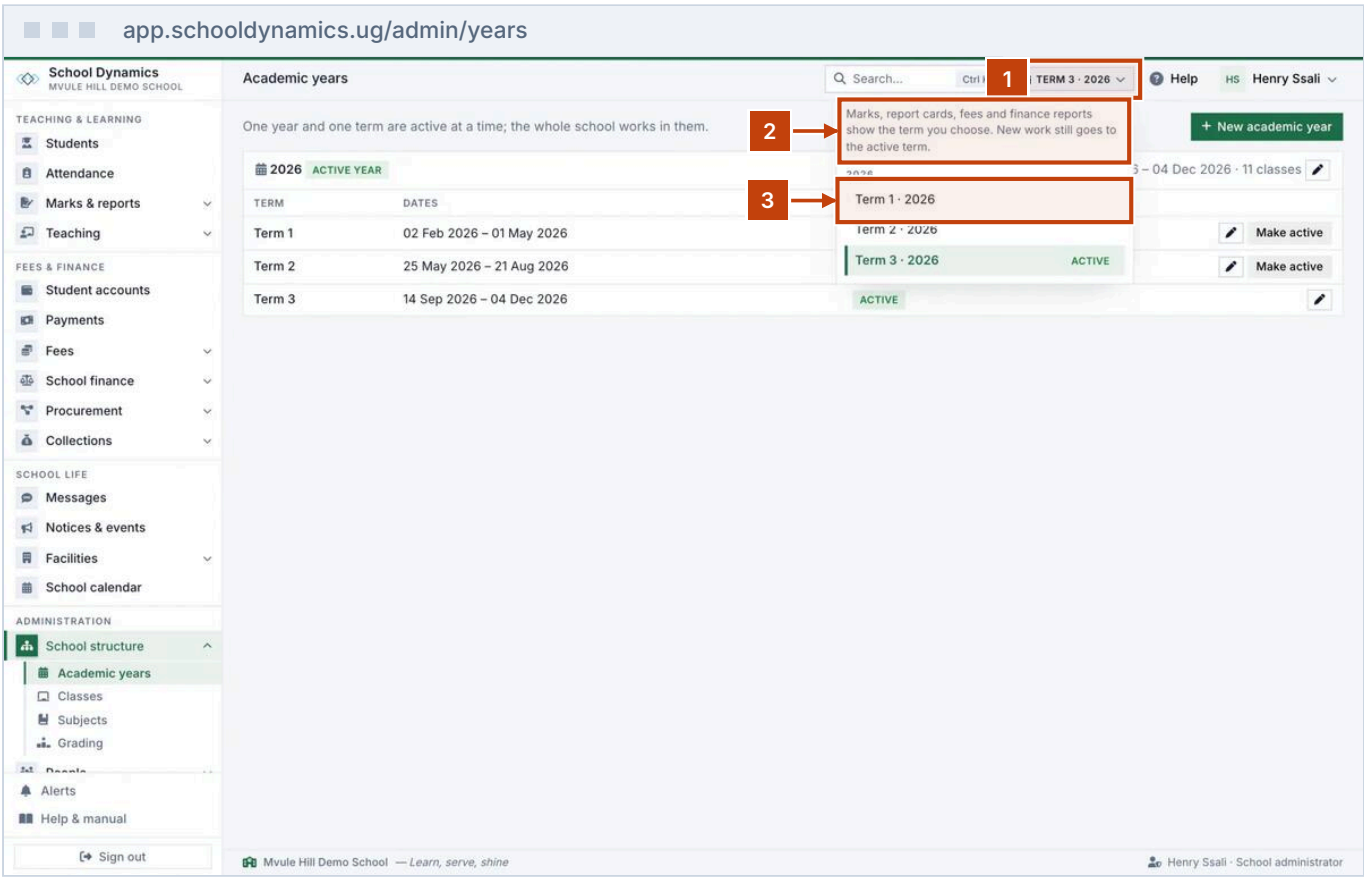
When a new term starts:

1. Find the new term in its year.
2. Press **Make active** beside it.
3. Confirm. The whole school now works in that term.

- Making a term active also makes its year the active year.
- Pressing **Make active** beside a year makes that year active, and its first term becomes the active term.

> ⚠ **CAREFUL**
>
> The active term is the school's, not yours: changing it changes it for everyone at the school. To look at an old term without changing anything, use the term in the top bar (below).

Look at another term from the top bar



The demo school · invented names and figures

1. The term you are looking at. It says Viewing when it is not the active term.
2. Reports show the term you choose; new work still goes to the active term.
3. Choose a term to look at it.

The top bar shows a term 1. Choose another one there to look back at it: marks, report cards, fees and finance reports then show the term you chose 2. This changes nothing for the school, and nothing for anyone else. New work still goes to the active term.

1. Press the term in the top bar.
2. Choose a term under its year 3. The active one is marked **Active**.
3. To go back, open it again and press **Back to the active term**.

While you look at another term, the top bar says **Viewing** before its name, so you always know. See also Finding your way.

Good to know

- Years and terms are never deleted. A year made by mistake can be renamed, given other dates and left inactive.
- Changing the active term does not move students or bill fees by itself. Fees are set per term under Fees; see Fee structure.
- A school billed per term by School Dynamics: when its licence invoice for a term is paid, that term becomes the active term by itself. See Licence and billing.
- At a university, the active term is the active semester. Making a semester active marks as enrolled exactly the students who are enrolled for it.

QUESTIONS

How do I move the school to the next term?
Under **School structure › Academic years**, press **Make active** beside the next term and confirm. The whole school then works in that term.

I chose an old term in the top bar. Did I change the school's term?
No. The top bar changes only what you are looking at, and only for you. New payments, bills and roll-calls still go to the active term. Press **Back to the active term** to return.

Can I delete a year or a term made by mistake?
No. Years and terms are never deleted. Correct its name and dates instead, and leave it inactive.

Does making a new term active bill the students?
No. Changing the active term changes where new work goes. Fees for the term are set under Fees; see Fee structure.

Classes and streams

The school's classes for each year, their class teachers, and the streams inside a class, each with its stream teacher.

For: School administrator, Director of studies · app.schooldynamics.ug/help/setting-up/classes-and-streams

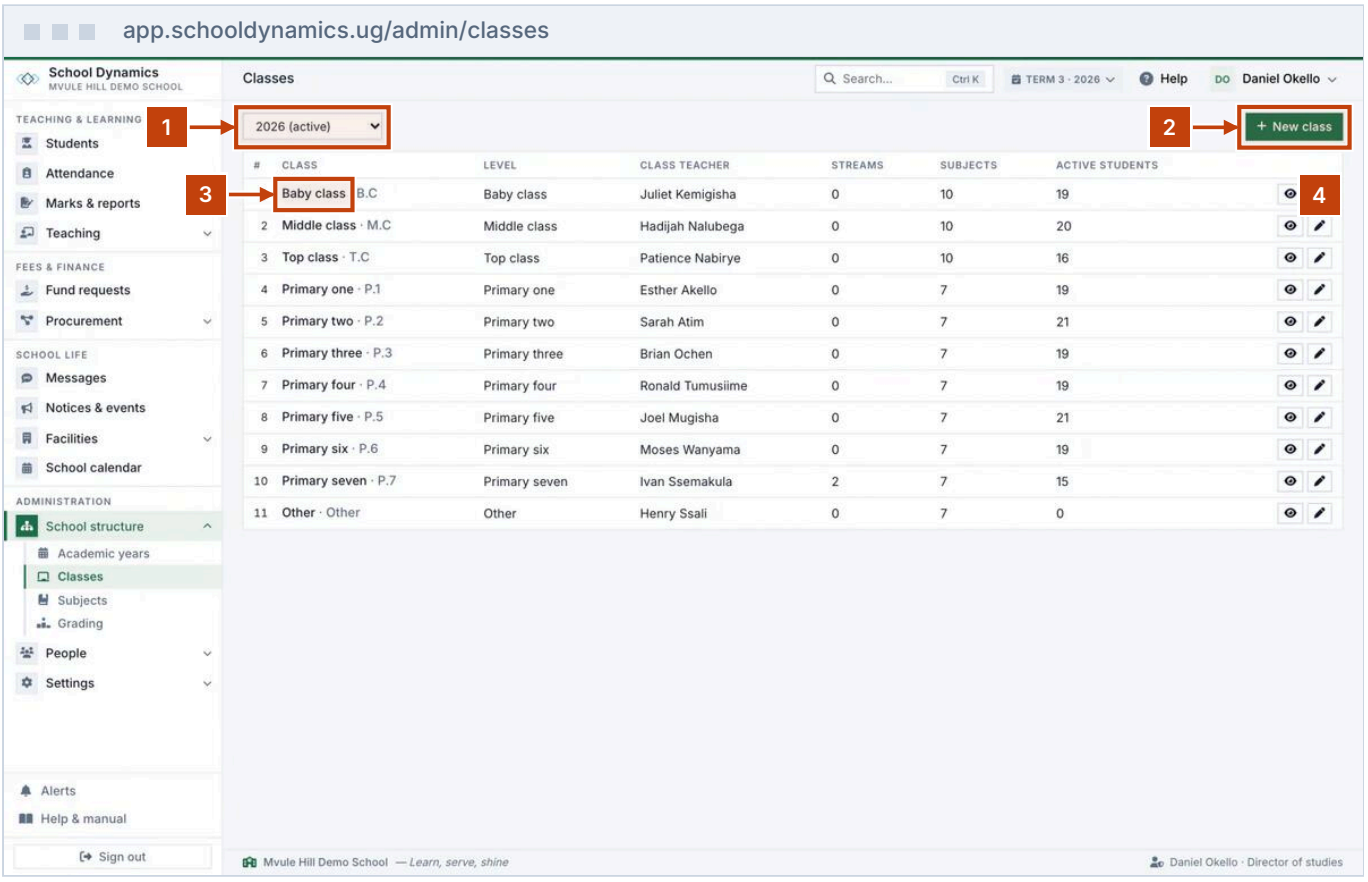
A class is one level in one academic year: P.4 in 2027, S.2 in 2027. It has a class teacher, its subjects and its students. A school has **one class per level each year**; when a level is split into groups (P.7 East and P.7 West), the groups are streams of that one class, each with its own stream teacher.

Open it from **School structure › Classes**.

Before you start

- The school administrator, the head teacher, the deputy, the director of studies, teachers and the secretary can see the classes.
- Only the school administrator, the director of studies and the school's owner can add or change classes and streams.
- The year must exist. A new academic year already gets one class for each level the school teaches, with its usual subjects; see Academic years and terms.

The list of classes



The demo school · invented names and figures

1 The year whose classes are listed. It opens on the active year.

2 Add a class for a level the school does not have yet this year.

3 Click a class to see it at a glance.

4 Change the class's name, class teacher or year.

The list shows the classes of one year 1, with each class's level, class teacher, number of streams, subjects and active students. Click a class's name 3 for its quick view. The pencil 4 changes the class.

Add a class

Most schools never need this, because each new year comes with its classes. Add one when the school starts teaching a new level.

1. Choose the year 1.
2. Press **New class** 2.
3. Choose the **Class level**.
4. Choose the **Class teacher**.
5. Press **Create class**.

The class takes the level's name and short name, and gets the usual subjects for its level. A secondary class also gets the compulsory subjects of the new curriculum. If the year already has that level, the dialog says *This school already has that class in that academic year.*

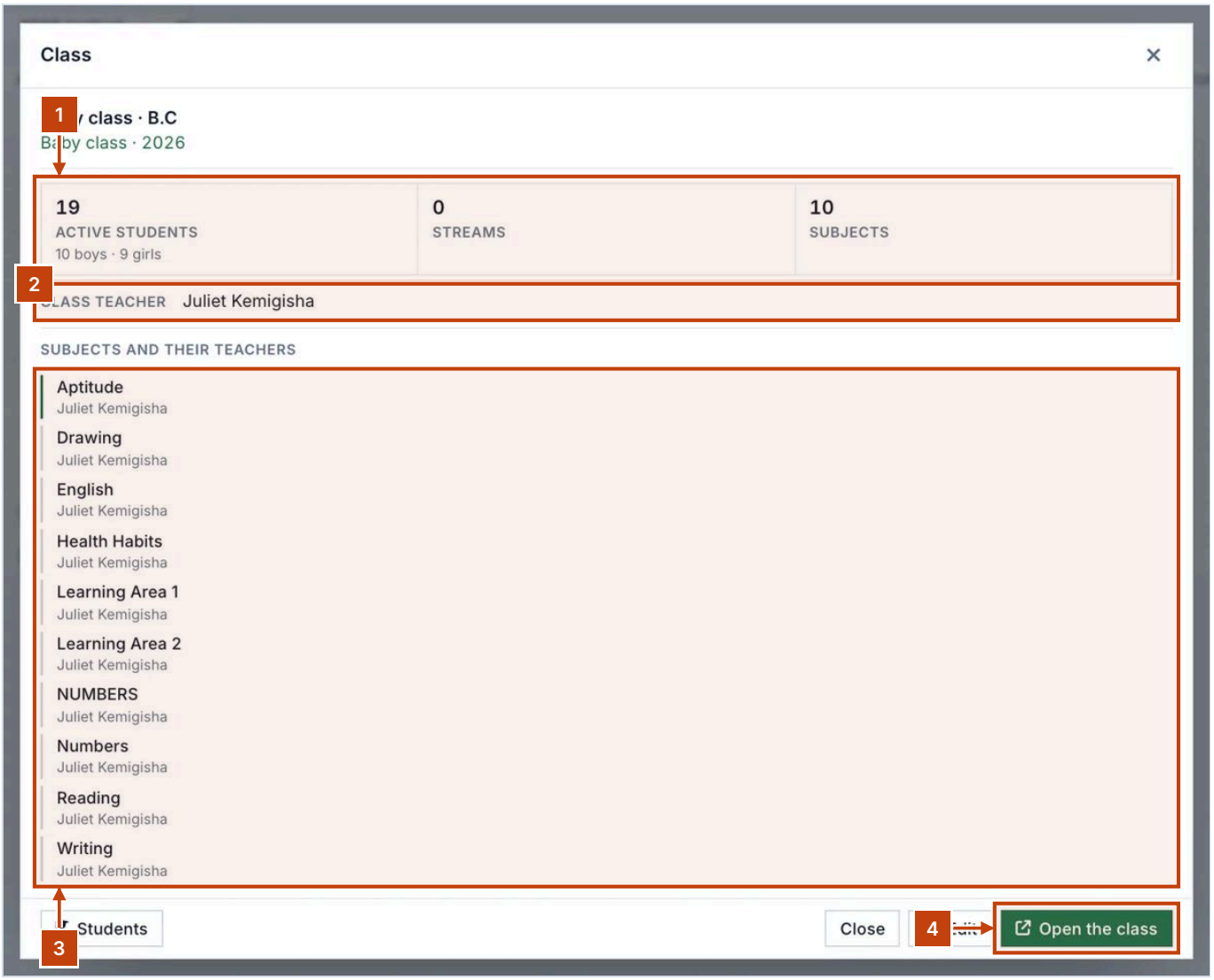
At a university, a class belongs to a programme instead of a level: choose the **Programme**. A programme has one class per academic year. See Programmes.

Change a class

1. Press the pencil beside the class.
2. Change the **Class name**, **Short name**, **Class teacher** or **Details**.
3. Press **Save changes**.

The class's level cannot change once it is made. Its **Academic year** can change only while no student is in the class; otherwise the dialog says *Students are enrolled in this class, so its year stays. Create the class in the other year instead.* When a class moves to another year, its subjects move with it.

A class at a glance



The demo school · invented names and figures

1 Active students (boys and girls), streams and subjects.

2 The class teacher, and each stream with its teacher and number of students.

3 Every subject of the class and its teacher.

4 The class's own page: subjects, streams and students.

Click a class's name for its quick view. It shows the active students, boys and girls 1, and each stream with its stream teacher and number of students 2. If some students of a streamed class are in no stream, it says how many. Below are the subjects and their teachers 3. **Students** opens the Students list for that class, **Edit** changes the class, and **Open the class** 4 opens its own page.

The class page

A class's own page shows its year, level and class teacher, and has these tabs:

Tab	What it holds
Subjects	The subjects the class takes, their teachers, and whether each is on report cards and graded. See Subjects.
New curriculum	Secondary classes only: the new curriculum subjects and their teachers.
Streams	The class's streams and their stream teachers.
Students	The class's active and pending students, with their stream.

Add a stream

1. Open the class and choose the **Streams** tab.
2. Press **Add stream**.
3. Type the **Stream name** (for example *East*).
4. Choose the **Stream teacher**, if it has one.
5. Press **Add stream**.

To rename a stream or change its teacher, press the pencil beside it, then **Save stream**.

Then put the students in their streams: on the Students list, tick them, press **Stream** and choose the stream. See Finding students.

Good to know

- Classes and streams are not deleted from these pages.
- Each year has its own classes. At the end of the year, students are promoted from this year's classes into next year's; see Changing class and promotion.
- Teachers must be members of the school's staff. Until your staff are added, the school's owner stands as class teacher; see Staff and their accounts.
- Class fees are set per class, not per stream; see Fee structure.

QUESTIONS

Our P.5 has two groups. Are they two classes?
No. A school has one class per level each year. Make the two groups **streams** of that class: open the class, choose the **Streams** tab and press **Add stream**.

I made a class in the wrong year. Can I move it?
Yes, while no student is in the class. Edit the class and choose the right **Academic year**. Once students are in it, its year stays; make the class in the other year instead.

Can I delete a class or a stream?
There is no button to delete a class or a stream on these pages.

How do students get into a stream?
From the Students list: tick the students, press **Stream** and choose it. Or set the stream in each student's details.

Subjects and their teachers

The subjects each class takes, who teaches them, and whether each is printed on report cards and counted in grades.

For: Director of studies, School administrator, Teacher · app.schooldynamics.ug/help/setting-up/subjects

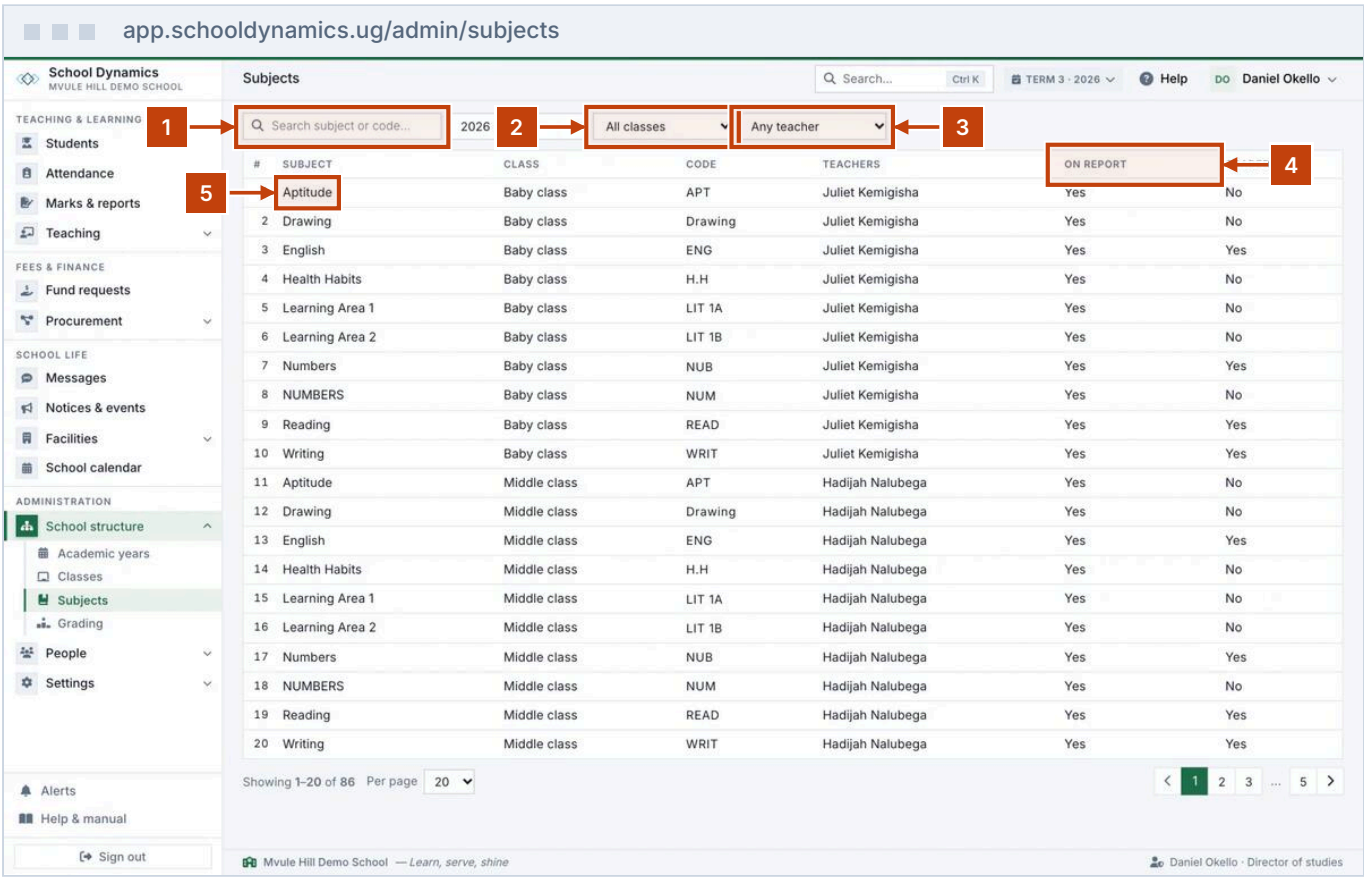
A subject here is a subject as one class takes it: English in P.4 and English in P.5 are two subjects, each with its own teachers. A new class already has the usual subjects for its level, so the work is mostly checking them, naming the teachers, and adding or removing a few.

Open the list from **School structure › Subjects**. Subjects are added and changed on each class's own page.

Before you start

- The school administrator, the head teacher, the deputy and the director of studies see every subject. Everyone else (teachers, mostly) sees only the subjects they teach, with the note *Subjects you teach*.
- Only the school administrator, the director of studies and the school's owner can add, change or remove subjects.
- Add your staff first, so you can name them as teachers; see Staff and their accounts.

The list of subjects



The demo school · invented names and figures

1 Find a subject by its name or code.

2 One class's subjects, or every class.

3 The subjects one teacher teaches.

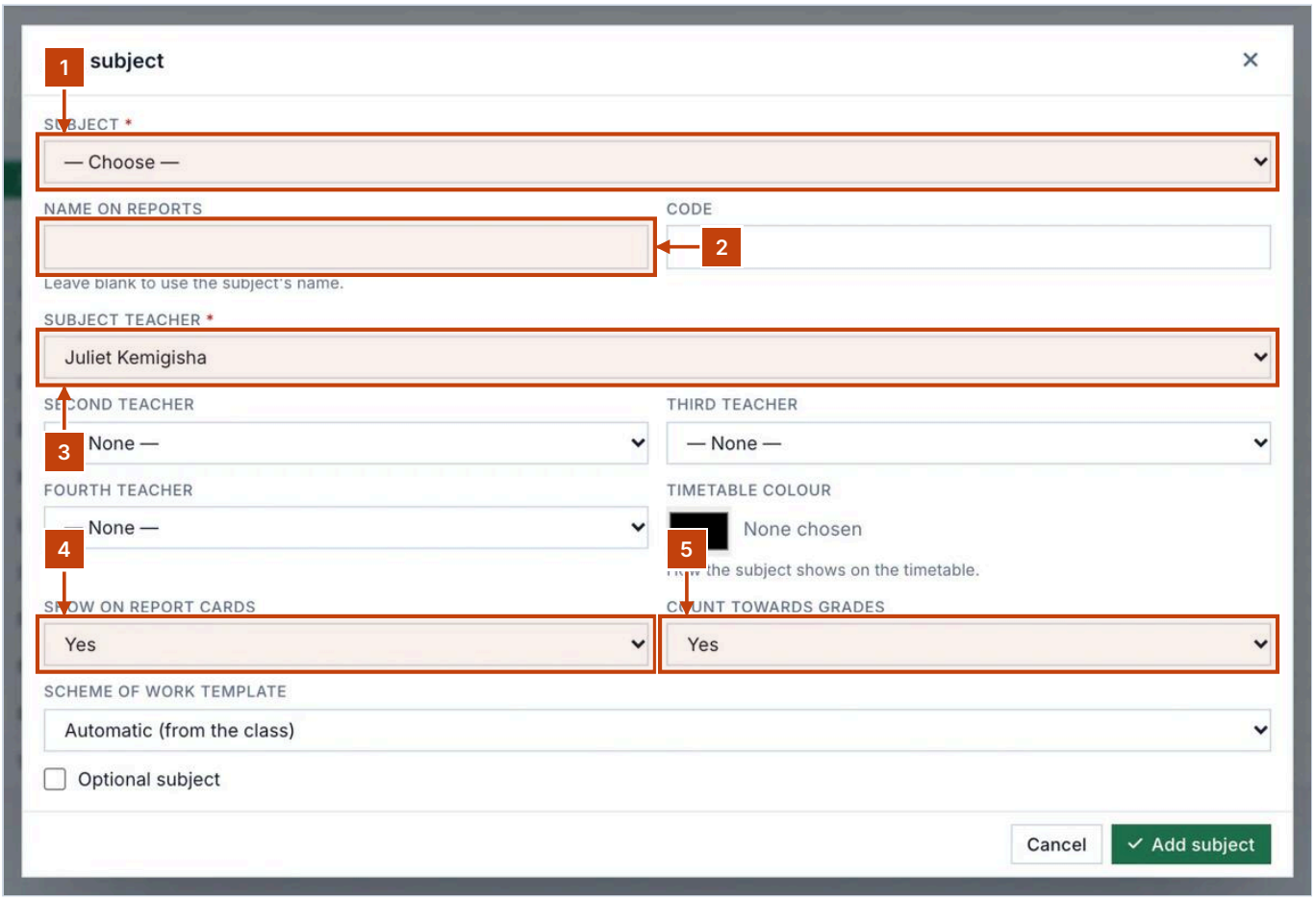
4 Whether the subject is printed on report cards, and whether it counts towards grades.

5 Click a subject to see how far its marks, scheme of work and lesson plans are.

The list shows every subject of the year, class by class, with its code and teachers. Search by name or code 1, or narrow it to one class 2 or one teacher 3. **On report** and **Graded** 4 say whether the subject is printed on report cards and counted in grades. Click a class's name to open the class.

Click a subject's name 5 for its quick view: how many of the term's marks are entered for the last two exams, how many lines its scheme of work has this term, and its lesson plans (how many, how many approved, and how many wait for review). From there, **Scheme of work** and **Marks** open those pages.

Add a subject to a class



The demo school · invented names and figures

1 The subject, from the list for this kind of class.

2 The name printed on report cards. Leave it blank to use the subject's own name.

3 The subject teacher. Up to three more teachers can share the subject.

4 **No** hides the subject from report cards.

5 **No** leaves the subject out of the totals and aggregates.

1. Open the class: click its name on the list, or open it from **School structure › Classes**.
2. On the **Subjects** tab, press **Add subject**.
3. Choose the **Subject** 1. A nursery or primary class can choose from the nursery and primary subjects and the others (such as Luganda, IRE and CRE); other classes from their own kind.
4. Change **Name on reports** 2 if the cards should say something else. Leave it blank to use the subject's own name. Add a **Code** if you use one.
5. Choose the **Subject teacher** 3. If others share the subject, choose them as **Second teacher**, **Third teacher** and **Fourth teacher**.
6. Set **Show on report cards** 4 and **Count towards grades** 5.
7. Press **Add subject**.

The other fields:

- **Timetable colour**: how the subject shows on the timetable. **No colour** clears it. See Timetable.
- **Scheme of work template**: the layout of the subject's scheme of work. **Automatic (from the class)** suits most subjects. See Schemes of work.
- **Optional subject**: tick it for a subject only some students take.

A class takes each subject once: choosing one it already has says *That subject is already in this class.* Every teacher must be a member of the school's staff.

Change or remove a subject

- To change a subject, open its class and press the pencil beside it, then **Save changes**. The subject itself cannot change; add the other subject and remove this one.
- To remove a subject, press the bin beside it and confirm. A subject that already has marks stays: the page says *This subject already has marks, so it stays. Hide it from reports instead.* Set **Show on report cards** to **No**.

> TIP
>
> Name the right teachers before marks entry opens. Teachers enter marks only for the subjects they are named on, so a subject with the wrong teacher shows up in the wrong teacher's marks entry.

New curriculum subjects (secondary schools)

A secondary class has a second tab, **New curriculum**, for the subjects of the new curriculum. A new secondary class already has its compulsory subjects. To add one, press **Add subject** on that tab, choose

the **Subject**, its teachers (up to four) and whether it is optional, and press **Add subject**. New curriculum subjects can be changed with the pencil, but not removed from this page.

When a school has new curriculum subjects, the Subjects page has two tabs, **Report-card subjects** and **New curriculum**. The second lists each subject with how many of its mark rows have a score this term. See Competency reports.

Good to know

- A subject always belongs to its class's year. When a class moves to another year, its subjects move with it.
- A subject's marks, scheme of work and lesson plans belong to it, so the same subject next year is a new subject in next year's class.

QUESTIONS

Where do I add a subject?
On the class's own page. Open **School structure › Classes**, open the class, and press **Add subject** on its **Subjects** tab. The Subjects page lists subjects but does not add them.

A teacher cannot see a subject in marks entry. Why?
Teachers enter marks only for the subjects they are named on. Edit the subject and choose them as the subject teacher or one of the other teachers.

Why can't I remove a subject?
A subject that already has marks stays, so its marks are not lost. Set **Show on report cards** to **No** to hide it from the cards instead.

Why does a teacher see only some subjects on this page?
Teachers see only the subjects they teach. The head teacher, the deputy, the director of studies and the school administrator see every subject.

Grading scales and the comment banks

Set how marks become grades and aggregates, and keep the banks of report comments and behaviour sentences that report cards draw on.

For: Director of studies, Head teacher · app.schooldynamics.ug/help/setting-up/grading-scales

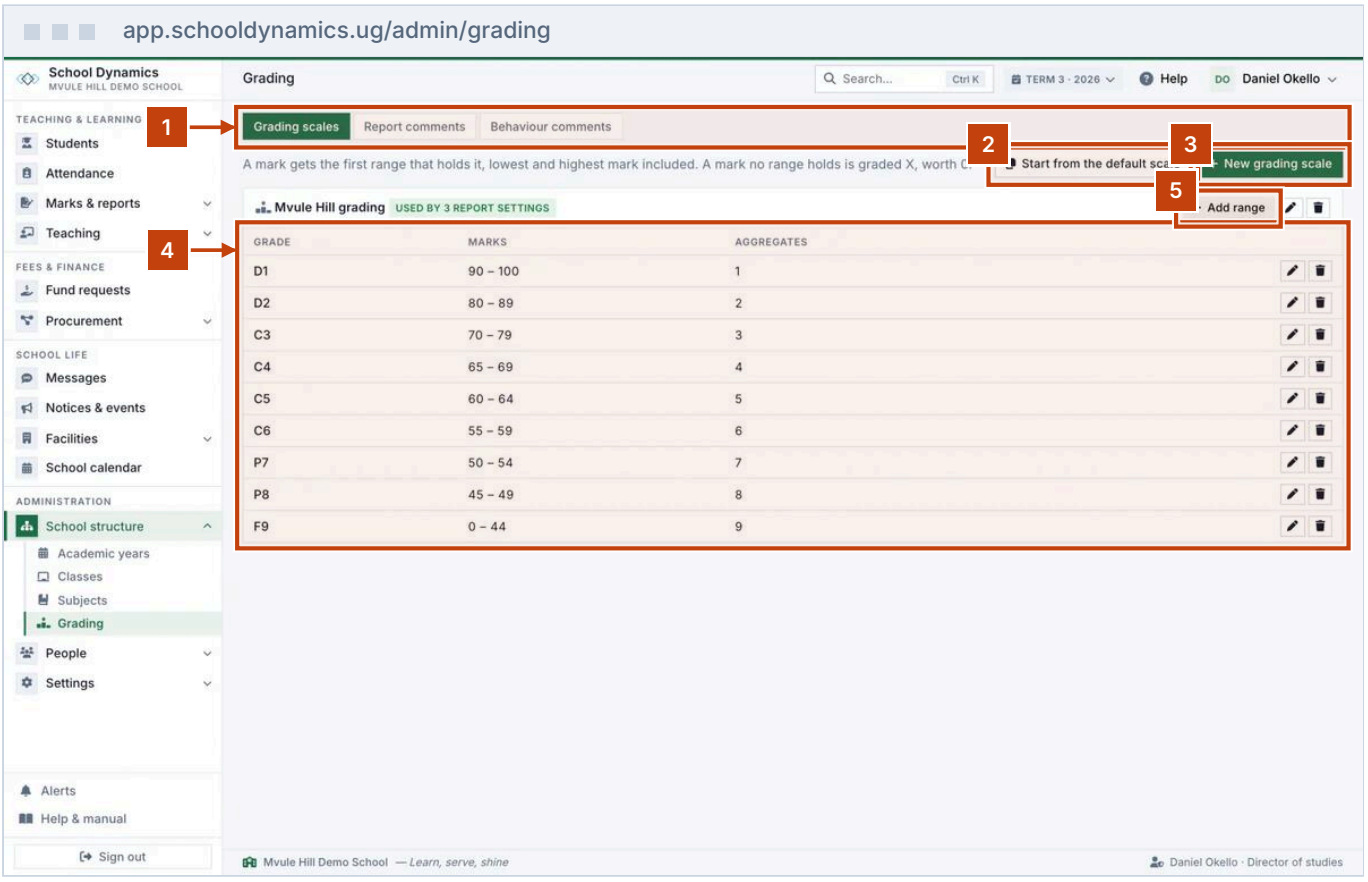
A grading scale turns a mark into a grade and its aggregates: for example, marks from 80 to 100 might be D1, worth 1 aggregate. Report cards add up the aggregates of the graded subjects. This page holds the school's scales, and two banks that report cards draw on: report comments and behaviour comments.

Open it from **School structure › Grading**.

Before you start

- The school administrator, the head teacher, the deputy, the director of studies and the school's owner can open and change this page.
- A scale is used once a term's report settings choose it; see Report settings.

The grading scales



The demo school · invented names and figures

1 Grading scales, report comments and behaviour comments: three pages of one menu entry.

2 Add a copy of the standard scale, D1 to F9, to change as you need.

3 Make a scale of your own.

4 The scale's ranges: the grade, its lowest and highest mark, and its aggregates.

5 Add a range to the scale.

The page has three tabs 1: **Grading scales**, **Report comments** and **Behaviour comments**. Each scale is a box with its ranges 4, highest first. A scale that report settings use says so in its heading (*Used by 3 report settings*).

Start from the default scale

Most schools start here.

1. Press **Start from the default scale** 2.
2. Confirm. A copy of the standard scale, D1 to F9, is added to the school with its ranges.
3. Change any range that is different at your school: press its pencil, change it, and press **Save changes**.

Make a scale of your own

1. Press **New grading scale** 3 .
2. Give it a **Name**, for example *Primary grading*, and press **Create scale**.
3. Press **Add range** 5 on the new scale.
4. Type the **Grade** (up to 15 characters, such as *D1*), the **Lowest mark**, the **Highest mark** and the **Aggregates** (what the grade adds to a student's total, such as 1 for D1).
5. Press **Add range**.
6. Add the other ranges the same way. Each time, the lowest mark is suggested: one above the highest mark so far.

The rules for a range:

- Marks run from 0 to 100, and both the lowest and the highest mark are included.
- Ranges in one scale cannot overlap. If they would, the dialog says which marks are already in which grade.
- A scale cannot have two ranges with the same grade.
- Two scales of the school cannot have the same name.

How a mark gets its grade

A mark gets the first range that holds it. A mark that no range holds is graded **X**, worth 0 aggregates. Under each scale, the page warns you in words when some marks are in no range (*Marks 35 to 39 are in no range, so they are graded X*) or in two ranges at once. Fix the ranges, then make the term's report cards again so the grades follow.

Rename, delete or copy a scale

- The pencil in a scale's heading renames it.
- The bin deletes the scale and its ranges. A scale that report settings use stays: the page says how many settings use it.
- If report settings in **other schools** also grade with a scale, its ranges cannot change here and the box says so; the scale shows **Copy this scale** instead of **Add range**. Copy it, change the copy, and choose the copy in your report settings.
- If one of your report settings grades with another school's scale (as old settings sometimes did), a note at the top says so. Choose one of your own scales in those report settings instead.

Report comments

The **Report comments** tab is the bank of comments for the class teacher and the head teacher. Each comment belongs to a band of total aggregates (for example 4 to 12). When cards are made with comments

from the bank, each card gets one comment, picked at random from the band that holds the student's total. None is written below 3 aggregates.

- **Add the standard comments** adds 40 ready-made comments in five bands (0–12, 13–24, 25–28, 29–32 and 33–36). Comments the school already has are not added twice.
- **New comment** adds one: type the band (**From (aggregates)** and **To (aggregates)**), the **Class teacher's comment** and the **Head teacher's comment** (each 5 to 500 characters), then press **Add comment**.
- Write `[NAME]` for the student's name, and `[HE_OR_SHE]`, `[HIS_OR_HER]` and `[HIM_OR_HER]` for He or She, His or Her, Him or Her. The dialog shows how the comment reads for a girl and for a boy.

How the comments get onto the cards is in Comments.

Behaviour comments

The **Behaviour comments** tab holds short sentences about how a child behaves, grouped by behaviour (Discipline, Punctuality, Participation…), each marked **Praise** or **Concern**. Teachers add them to a report card's comment with a tap; they are never written onto cards by themselves.

- **Add the standard sentences** adds the ready-made ones the school does not have yet.
- **New sentence** adds one: type the **Behaviour**, choose **Praise** or **Concern**, write the **Sentence**, and press **Add sentence**.
- Removing a sentence from the bank does not change cards that already use it.

QUESTIONS

Which grading scale do the report cards use?
The one chosen in the term's report settings. You choose it when you set up the term; see Report settings.

A student's mark shows the grade X. Why?
No range of the scale holds that mark, so it is graded X, worth 0 aggregates. The scale's box on the Grading page lists the marks no range covers. Add or widen a range, then make the report cards again.

Why can't I change the ranges of our scale?
Report settings in other schools also grade with it, so a change would change their grades. Press **Copy this scale**, change the copy, and choose the copy in your report settings.

Do behaviour sentences go on report cards by themselves?
No. Teachers add them to a card's comment themselves. Report comments are different: they can be written onto cards from the bank when the cards are made.

Theology classes

Turn theology on, generate the theology classes from the secular ones, and keep their subjects, streams and students.

For: Director of studies, School administrator · With theology · app.schooldynamics.ug/help/setting-up/theology-classes

A school that teaches theology runs a second track beside its secular classes: theology classes, with their own subjects (such as Quran and Fiqh), streams, marks and report cards. A student is in one secular class and, usually, one theology class of the same year.

Open it from **School structure › Theology classes**. The menu shows it only to schools that teach theology.

Before you start

- The school's owner or a school administrator turns theology on (below).
- The school administrator, the head teacher, the deputy, the director of studies, teachers and the secretary can see the theology classes.
- Only the school administrator, the director of studies and the school's owner can make or change them.
- The year's secular classes and their students should be in place, because the generator copies students from them.

Turn theology on

1. Open **Settings › School profile** and choose the **Theology** tab.
2. Press **Edit**.
3. Set **Does the school teach theology?** to **Yes, theology is taught**.
4. Press **Save settings**. The page opens again, and the menu now has **Theology classes**.

Turning it off later hides the theology classes, marks and report cards. Nothing is deleted. If it is off, the Theology classes page says so, and still lists the classes made earlier.

Generate the theology classes

The quickest way to set up a year is the generator. For each class you tick, it makes the theology class for the year (if the school does not have it yet), gives it every theology subject, and puts in every student of the secular class of the same level.

1. On **Theology classes**, press **Generate classes**.
2. Choose the **Academic year**: the active year, or a later one.
3. Under **Classes to generate**, tick the classes you want, from Primary one to Primary seven and Baby, Middle and Top class. Untick the ones the school does not need.
4. Press **See what will be created**. A table shows, for each class: whether it is new or already there, the subjects it will get, which secular class its students come from, and how many students will be added. Nothing is saved yet.
5. Press **Generate** and confirm.

A line then says how many classes, subjects and students were added. New classes have the school's owner as class teacher and subject teacher: change them on each class's page. **Earlier runs** lists the years already generated and which classes.

> GOOD TO KNOW
>
> Running the generator again only adds what is missing. Classes, subjects and students already there are left as they are, and a class you renamed keeps its name.

Add a theology class by hand

1. Press **New theology class**.
2. Choose the **Academic year** (the active year, or a later one).
3. Type the **Class name** (*Primary one*) and **Short name** (*P.1*). A year has one theology class per short name.
4. Choose the **Class teacher**.
5. Leave **Add every theology subject, taught by the class teacher** ticked to give the class all the subjects now.
6. Press **Create class**.

Short names are compared without caring about capitals, spaces or dots: *P1* and *P.1* are the same class. If the year already has it, the dialog says *This year already has a theology class with the short name P.1.*

To change a class's name, short name, class teacher or details, press its pencil and then **Save changes**. Its year cannot change.

A theology class's page

Click a class's name for its quick view (students, streams and subjects with their teachers), then **Open the class** for its page. It has three tabs:

- **Subjects**: the theology subjects and their teachers. **Add subject** adds one the class does not have yet, with a **Subject teacher** and up to three more teachers. The pencil changes the teachers; the bin removes a subject, unless it already has marks (*This subject already has marks, so it stays.*).
- **Streams**: **Add stream** makes one (for example *Blue*), with a **Stream teacher**. The pencil renames it.
- **Students**: the class's active and pending students, or **Everyone, including those who left**.

Students in a theology class

- **Add student**: type at least two letters of the student's name or registration number, choose the student, choose a **Stream** if you want, and press **Add student**. A student already in another theology class of the same year moves here; they do not get a second place.
- **Change stream or class** (the arrows beside a student): choose another **Theology class** of the year or another **Stream**, and press **Move student**.
- **Take out** (the person-minus button): takes the student out of this theology class.

Students are added and moved only in the active year or a later one. In a past year the page says so: streams can still change, but students cannot be added or moved.

On the Students list, the **Theology stream** button puts several ticked students in a theology stream at once.

Theology subjects

Theology subjects (on the Theology classes page) lists the theology subjects every school shares, and how many of your classes take each. Only School Dynamics changes this list. A generated theology class gets one subject for each.

Marks and report cards

Theology marks and report cards have their own pages, beside the secular ones. See Theology marks and The term at a glance: schools with theology classes see a **Secular / Theology** switch there.

QUESTIONS

I cannot see Theology classes in the menu.
The school must teach theology. The owner or a school administrator turns it on under **Settings › School profile**, on the **Theology** tab.

If we turn theology off, is anything lost?
No. Turning it off hides the theology classes, marks and report cards from the menu. Nothing is deleted, and turning it on again brings them back.

We generated the classes, then admitted more students. Do I generate again?
Yes, if you want. Running the generator again only adds what is missing, including students now in the secular class who are not yet in its theology class.

Can I add a theology subject that is not on the list?

The theology subjects are shared by every school and only School Dynamics changes the list. Ask School Dynamics support.

Programmes and semester enrolment

Set up a university's programmes with their semesters and tuition, then enrol students each semester so they are billed.

For: School administrator, Director of studies, Secretary · Colleges · app.schooldynamics.ug/help/setting-up/programmes

A university or tertiary school teaches programmes (a diploma, a degree) instead of class levels. Each programme offers some of eight semesters, each with its tuition. Each semester, students are enrolled, and enrolling them bills their tuition and the semester's services.

Open it from **School structure › Programmes**. The page has two tabs: **Programmes** and **Semester enrolment**. Other kinds of school do not have these pages.

Before you start

- The school administrator, the head teacher, the deputy, the director of studies, teachers and the secretary can see the programmes. Only the school administrator, the director of studies and the owner can add or change them.
- Enrolling students is for those who manage students: the school administrator, the director of studies and the secretary.
- A university's academic year has two semesters. One must be active to enrol students into it; see Academic years and terms.

Add a programme

1. On the **Programmes** tab, press **New programme**.
2. Type the **Name** (*Diploma in Clinical Medicine*) and the **Code** (*DCM*). Both must be unique in the school; a new class of this programme takes the code as its short name.
3. Add a **Description** if you want, and leave the **Status** on **Active**.
4. Under **Semesters and tuition (UGX)**, tick each semester the programme offers and type its tuition. Beside *Quick:*, **4 semesters**, **6 semesters** or **8 semesters** ticks the first ones at once and fills them with the first tuition you typed.
5. Press **Create programme**.

Tuition below UGX 500 is not billed. A semester that is not offered keeps no tuition.

Then give the programme a class in each academic year: under **School structure › Classes**, press **New class** and choose the **Programme**. See Classes and streams.

The list and a programme's quick view

The list shows each programme's code, semesters, tuition for all semesters, classes, active students and status. Search by name or code, or show only active or inactive ones. **All fees structures** downloads one PDF with every active programme's fees structure.

Click a programme for its quick view:

- the tuition for all semesters, the total with compulsory services, and how many are enrolled this semester;
- each semester with its tuition, compulsory services, total and number enrolled;
- its classes, year by year;
- the optional services students may choose.

From there, **Fees structure** downloads its PDF, **Enrolled** opens its students on the Semester enrolment tab, and **Edit** changes it. **Delete** shows only while nothing uses the programme.

> ⚠ CAREFUL
>
> A change of tuition does not reach students already enrolled by itself. When some enrolments of this semester are out of step with the programme, the quick view says how many and why. Press **Bring in line**: each tuition line is corrected in place and missing compulsory services are added; nothing else changes. Tuition lines someone corrected by hand are left as they are.

Enrol students for a semester

The **Semester enrolment** tab shows, for the active semester, how many are enrolled, how many active and pending students are not, and what was billed. **Enrolled** lists the enrolments; **Not enrolled yet** lists the students still to enrol, each with **Enrol** beside them.

To enrol one student:

1. Press **Enrol a student** (or **Enrol** beside a student on **Not enrolled yet**).
2. Choose the **Student**.
3. Choose the **Year of study** and the **Semester of study**. The programme bills the tuition of that semester.
4. Check the **Registration number**, **SchoolPay code** and **PegPay code**. They are copied onto the student.
5. If the student owed money from before that is not in this system yet, tick **Record a balance owed from before** and type it. A balance already in this system is carried by itself; recording it here would count it twice.
6. Tick any **Optional services** they take. Compulsory services are added by themselves.
7. Read **Enrolling will**: it lists exactly what will be billed. Press **Enrol**.

To enrol a whole class, press **Enrol a class**, choose the **Class**, the **Year of study** and the **Semester of study**, check the list, and press the **Enrol ... students** button, which says how many. Each student keeps their own codes; balances from before are set on each enrolment.

What enrolling does

In one go, enrolling a student:

- makes the student active, if they were pending;
- marks them enrolled for the semester;
- bills their class's fees for the term, the semester's tuition and the compulsory services, and any optional services chosen;
- records the balance from before, when you typed one;
- then imports any SchoolPay payments waiting under their code.

A student has one enrolment per semester. Processing it again never bills twice: each step checks what is already on the student's account first.

Change or withdraw an enrolment

Open an enrolment from the **Enrolled** tab for its quick view: its bills, services and codes, and what processing it again would change.

- **Edit** changes it, then **Save and process** applies the change.
- **Re-process** processes it again with the programme's current tuition and services.
- **Withdraw...** takes the student out of the semester. The dialog lists exactly what is taken back, each bill by its own reversal, and what stays: payments, the class fees of the semester and the student's status. Write the **Reason** and press **Withdraw and reverse**.

Recount enrolled marks as enrolled exactly the students enrolled for the active semester. Enrolments of a past semester can be read and withdrawn, but enrolling and processing happen only in the active semester.

QUESTIONS

I cannot see Programmes in the menu.
Programmes are for University schools only. The kind of school is set by School Dynamics; ask support if yours is wrong.

I changed a programme's tuition. Are enrolled students billed the new amount?
Not by themselves. The programme's quick view lists the enrolments now out of step; press **Bring in line** to correct their tuition and add missing compulsory services.

Can I delete a programme?
Only one that nothing uses yet. A programme with classes or compulsory services stays; set it **Inactive** instead.

Does enrolling a student twice bill them twice?
No. A student has one enrolment per semester, and processing an enrolment again never bills twice.

Licence and billing

Pay School Dynamics' invoices, choose or renew a package, buy SMS credit, and what happens when a licence bill goes unpaid and the system locks.

For: School owner, Bursar, School administrator, Head teacher · app.schooldynamics.ug/help/setting-up/licence-and-billing

School Dynamics is provided by Newline Technologies, which sends the school its invoices and receipts. **Licence & billing** is the school's own page for them: where the licence stands, the bill to pay now, the packages, SMS credit, and every invoice and receipt.

Open it from **Settings › Licence & billing**.

Before you start

- The school's owner, the school administrator, the head teacher, the deputy, the bursar and the finance officer can open this page and pay from it.
- The demo school is never billed, so this page cannot be tried there.

Reading the page

- **At the top right**, a badge says where the licence stands, for example *Active* or *Free trial*.
- **The bill to pay now**, when there is one, is at the top: *Payment due* or *Overdue*, the amount, what it is for, its number and due date. **Invoice** opens the PDF, **Details** opens the invoice page.
- **Four figures**: the **Licence** status, **Access until** (the end date, and how many days are left), the school's **Active students** (and the package that fits them), and the **SMS wallet** (with about how many messages it pays for).
- **Invoices to pay** lists every unpaid invoice. One you said you paid shows *Paid · being confirmed*.
- **Choose a package** (or **Renew or change your package**) shows the packages. A school billed per term by Newline sees *Your school is licensed* instead: it has no package to choose, and its next licence invoice appears on this page.
- **SMS credit** and **How to pay** sit side by side.
- **Billing history** lists the paid and cancelled invoices, each with its **Invoice** and, once paid, its **Receipt**.

Pay an invoice

When paying online is switched on for School Dynamics, the bill shows **Pay now** (and each invoice **Pay**):

1. Press **Pay now**.
2. Pay on the payment page with Mobile Money, Visa or Mastercard.
3. Wait for the confirmation. Access returns as soon as the payment is confirmed, usually within a minute.

Otherwise, pay by bank or mobile money and then tell Newline:

1. Press **How to pay**. The dialog shows how to pay by bank or mobile money, and the invoice number to quote as the reference.
2. Pay, quoting the invoice number.
3. Press **I have paid**.
4. Choose how you paid (**Bank transfer**, **Mobile Money** or **Cash**), type the **Reference** from your slip or message and the **Date paid**, and add a note if Newline should know something.
5. Press **Send to Newline**.

The invoice then shows *Paid · being confirmed*. Nothing else changes until Newline confirms the payment; then the invoice shows as paid and its receipt is in **Billing history**.

> TIP
>
> **How to pay** also gives a **Payment link** to copy. It opens the invoice without signing in, so you can send it to whoever pays, such as the school's director or chairman.

If the page says paying online is still done in School Dynamics classic, follow its link to pay there; the invoice is the same.

Choose or renew a package

Packages are priced by the number of active students. The package that fits your school is marked **Recommended for you**; one too small says *Too small for … students* and cannot be chosen.

1. Choose the length: **6 months** or **12 months**.
2. Choose **Pay in full** or **3 instalments**.
3. Press the **Choose ...** button of the package you want (it carries the package's name).
4. Read the dialog: the price, and each payment with its due date.
5. Press **Order and pay** (or **Order — get the invoice** when paying online is off).

An invoice is raised for each payment. The package starts when its first invoice is paid. If you already have a package running, the new one starts after your current period, so no days are lost. An earlier order that was never paid is replaced.

> ⚠ CAREFUL
>
> With 3 instalments, access grows as each one is paid. A later instalment not paid by its date locks the system for everyone at the school until it is paid.

Buy SMS credit

1. Press **Buy SMS credit**.
2. Type the **Amount (UGX)**: between UGX 5,000 and UGX 5,000,000. UGX 50 buys one SMS part; the dialog shows about how many messages that is.
3. Press **Order and pay** (or **Order — get the invoice**), and pay the invoice as above.

The credit goes into the SMS wallet as soon as the payment is confirmed. See How SMS works.

When the system locks

The system locks for everyone at the school when:

- a licence invoice, or the second or third instalment of a package, passes its due date without being paid; or
- School Dynamics suspends or cancels the school's subscription.

While it is locked, every page gives way to a page that says *... licence has expired*. **My profile**, signing out and **Licence & billing** still open. The school's records are safe; nothing is lost.

What the locked page shows depends on who you are:

- **Those who can pay** (the owner, the school administrator, the head teacher, the deputy, the bursar and the finance officer) see the unpaid invoice: its number, due date, how many days overdue and the

amount. They can pay it from there in the same ways as above (**Pay**, or **How to pay** and **I have paid**), open the **Invoice PDF**, or copy the **Payment link**. With no invoice to pay, they see the packages to renew with (a school billed per term is asked to call Newline for its next invoice).

- **Everyone else** sees a short explanation and whom to speak to: the school's owner, with their phone and email.

Once the payment is confirmed, the system opens again by itself. If the school has just paid, it may take a few minutes.

Good to know

- Each invoice has its own page, from its number or **Details**: what is still to pay, the payments recorded against it, and the invoice itself. A binding invoice says that the system locks if it is not paid by its due date.
- A school billed per term: when its licence invoice for a term is paid, that term becomes the school's active term, and access runs to the end of the term plus a few days' grace.
- The **Licence** tab of the school profile shows the same status, read-only. The licence itself is managed by School Dynamics.

QUESTIONS

Our system says the licence has expired. Are our records lost?
No. The school's records are safe and nothing is lost. The system opens again by itself once the bill is paid; it can take a few minutes after the payment is confirmed.

Who can pay the bill?
The school's owner, the school administrator, the head teacher, the deputy, the bursar and the finance officer. Other staff are told whom to speak to.

We paid by bank. Why does the invoice still say it is due?
A bank, mobile money or cash payment shows as paid once Newline Technologies confirms it. Press **I have paid** and give the reference on your slip, so they can match it.

If we renew early, do we lose the days we have left?
No. Paying again extends the licence from your current end date.

Data protection and account deletions

Accept the data processing agreement, print the privacy notice for parents, record consent, decide how long former students' details are kept, and handle requests to delete accounts.

For: School owner, School administrator, Head teacher, Secretary · app.schooldynamics.ug/help/setting-up/data-protection

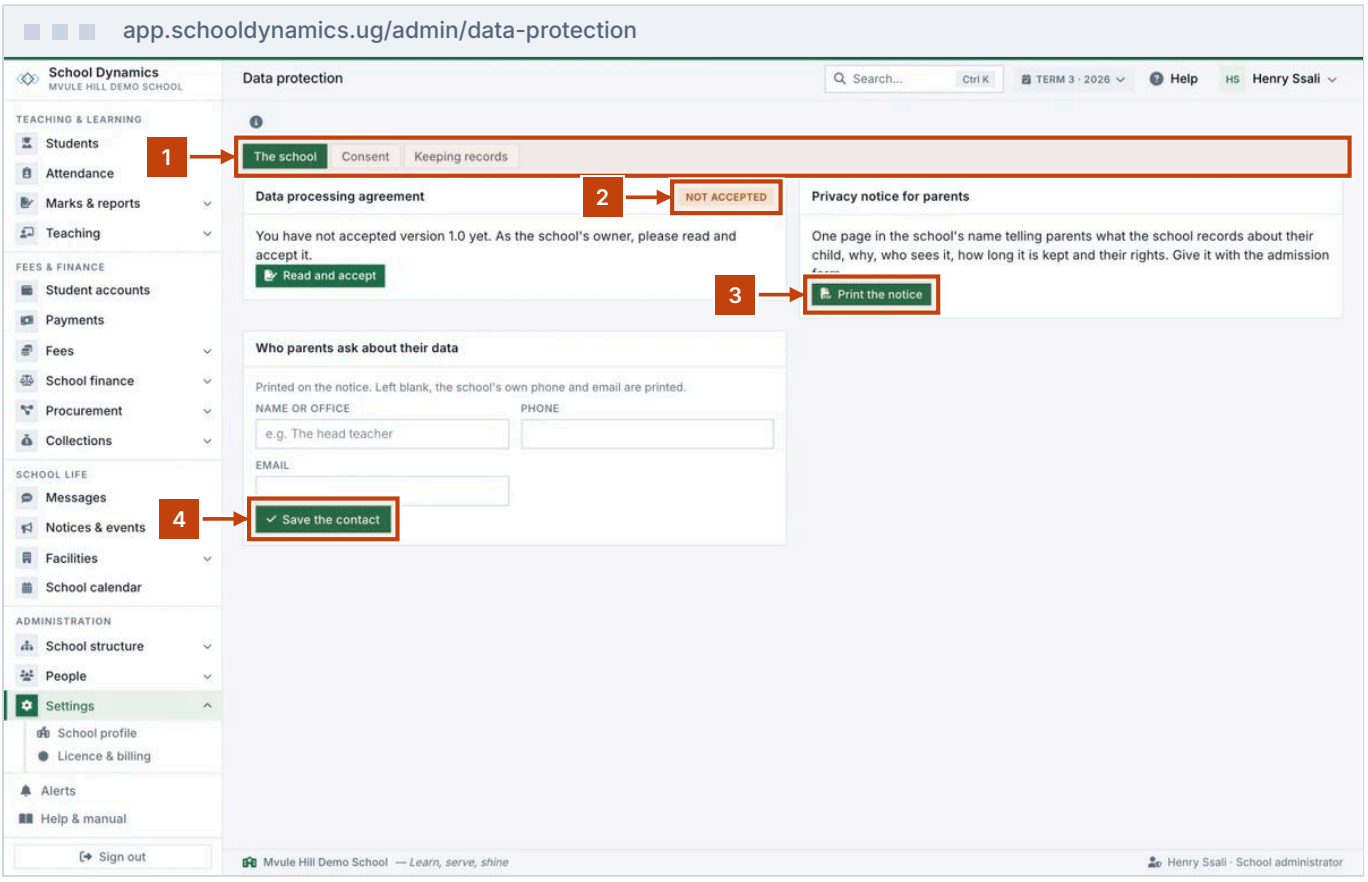
The school is in charge of its students', parents' and staff records; School Dynamics keeps them for the school. Uganda's Data Protection and Privacy Act asks the school to agree this with School Dynamics in writing, to tell parents what it records, to ask a parent before a child's photo is used in public, and to keep records no longer than it needs. **Data protection** holds all of that. Requests to delete an account are under **People › Account deletions**.

Open it from **Settings › Data protection**.

Before you start

- The school administrator, the head teacher, the deputy, the secretary and the school's owner can open **Data protection** and record consent.
- Only the owner and the school administrators can change the privacy contact, open the full agreement and use **Keeping records**.
- Only the school's owner can accept the agreement.

The school



The demo school · invented names and figures

1 The school, Consent, and Keeping records (for the owner and school administrators).

2 Whether the data processing agreement is accepted.

3 The one-page privacy notice for parents, as a PDF.

4 Whom parents ask about their data. It is printed on the notice.

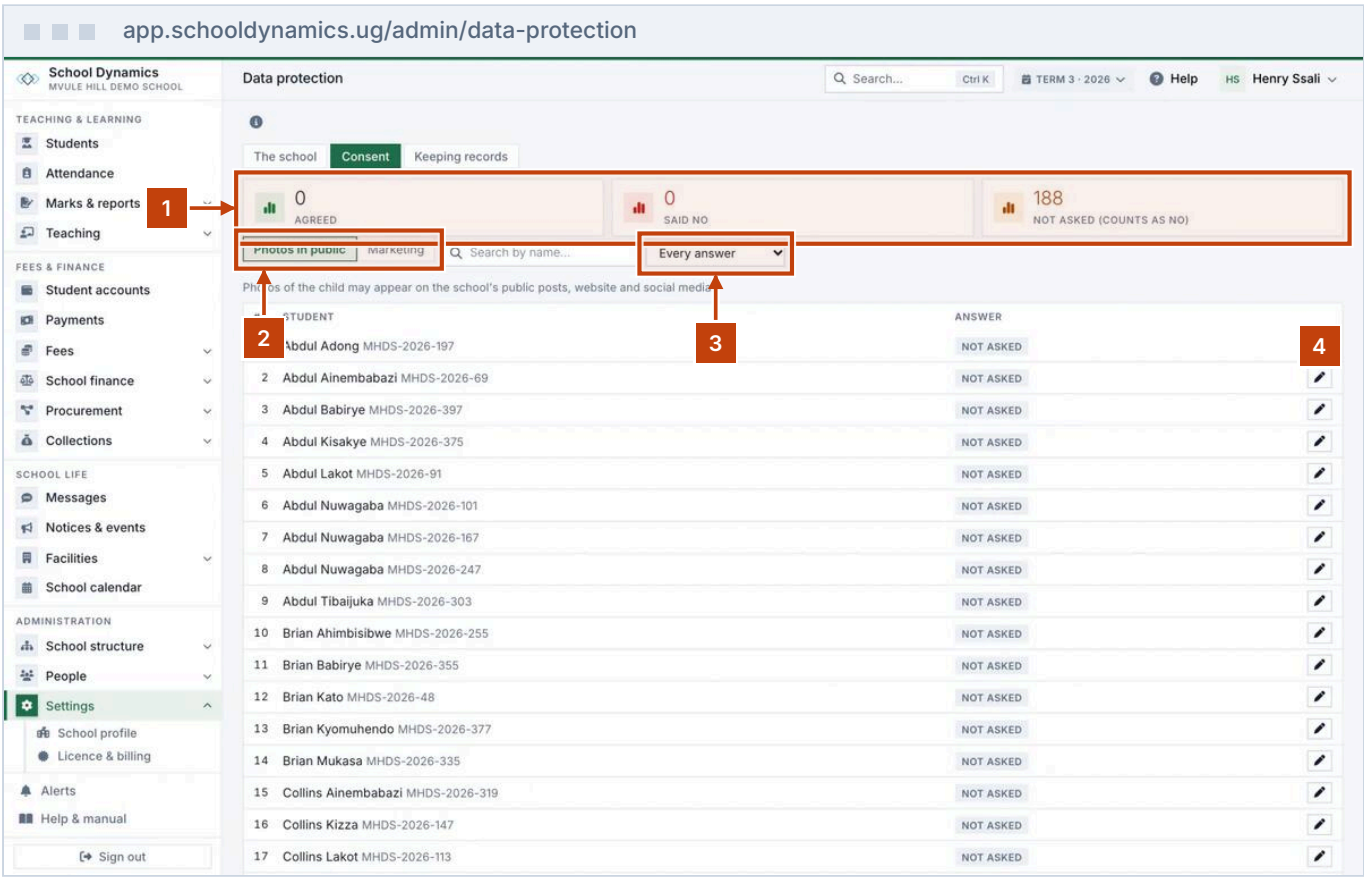
The first tab 1 has three boxes.

Data processing agreement. Its badge 2 says whether the agreement is accepted, and the box says by whom and when. While it is not accepted, the owner sees **Read and accept**: read it, tick *I accept this agreement on behalf of …* and press **Accept the agreement**. The owner can put it off for a while with **Ask me later**; the page says until when. Once accepted, or for anyone else, the button says **Read the agreement**. On the agreement, **Printable copy** opens a copy to print.

Privacy notice for parents. One page in the school's name telling parents what the school records about their child, why, who sees it, how long it is kept and their rights. Press **Print the notice** 3 for the PDF, and give it with the admission form.

Who parents ask about their data. Type a **Name or office** (*The head teacher*), a **Phone** and an **Email**, and press **Save the contact** 4. It is printed on the notice. Left blank, the school's own phone and email are printed.

Consent



The demo school · invented names and figures

1 How many agreed, said no, or were never asked (which counts as no).

2 Which consent: photos of the child in public, or marketing to the parent.

3 Show only those who agreed, said no or were not asked.

4 Record an answer.

The **Consent** tab records two answers:

Consent	About	The question
Photos in public	The child	Photos of the child may appear on the school's public posts, website and social media.
Marketing	The parent	The school may send the parent news of its own offers, events and fundraising that are not about the child.

Choose the consent 2. The figures 1 count who agreed, who said no and who was never asked. **No answer counts as no.** Search by name, or show one answer only 3.

To record an answer:

1. Press the pencil beside the child or parent 4.
2. Choose **Agreed** or **Said no**.
3. Choose **How was it given?**: the admission or consent form, the parent in person or by phone, or the parent in the app.
4. Type **Who answered, and when** (for example *Mother, on the admission form, 12 Oct*).
5. Press **Record the answer**.

Every answer is written in the school's audit log.

Keeping records

This tab is for the owner and school administrators. It sets how long a former student's personal details are kept after they leave.

1. Type **Years after a student leaves**.
2. Choose **After that**: **Keep everything (no policy)**, **Report who is past the period, change nothing**, or **Anonymise them, after I approve each report**.
3. Press **Save the policy**. Nothing changes yet.
4. Press **Make a report now**. The report lists every former student past the period, and what would happen to each.

A student counts as having left at the end of the last school year they were in a class. Anyone whose fees account is not settled is **kept back**, with the reason. Anonymising removes names, dates and places of birth, addresses, phones, email, nationality, religion, parents' and emergency contacts, ID numbers, the SchoolPay code and the photo. The admission number and sex stay, and marks, report cards and the fees ledger stay, linked to *Former student #....*

> ⚠ CAREFUL
>
> Anonymising cannot be undone. It happens only when the policy is **Anonymise them, after I approve each report**, the report is less than 30 days old, and someone reads it and presses **Anonymise ...** and confirms. Until School Dynamics switches anonymising on, the page says so, and reports only show what would happen.

The **Reports** list shows each report with its date, how many are past the period, and its state: *To read*, *Approved*, *Replaced* (a newer report took its place) or how many were anonymised.

Account deletions

Parents and staff can ask to delete their account, in the phone app or on the website. Their requests wait under **People › Account deletions** for the school to decide.

- The school administrator, the head teacher and the school's owner decide them.
- The list opens on **Waiting**; **Deleted**, **Declined** and **All** show the others. Each request shows who asked, from where, and their reason.

To decide one:

1. Press **Decide** beside the request.
2. Choose **Delete the account** or **Decline**.
3. To decline, write why; the reason is kept with the request, so the person can be told. To delete, a note is optional.
4. Press **Delete the account** or **Decline the request**.

> ⚠ **CAREFUL**
>
> Deleting closes the account and clears its personal details at once: phones, email, addresses, photo, family and ID details. It cannot be undone. A parent's name becomes *Deleted account*. Fees payments, receipts and payroll records are kept, as the law requires; staff keep their name, TIN and NSSF number on those records. The school's owner, and its last school administrator, stay active, so their requests cannot be completed this way.

Students' records belong to the school, so students cannot ask to delete them here. Every decision is written in the audit log.

QUESTIONS

Who accepts the data processing agreement?
Only the school's owner, once for the school. Others can read it, and see who accepted it and when.

A parent never answered about photos. Can we post their child's photo?
No answer counts as no. Record the parent's answer first, with who gave it and when.

Does setting how long records are kept delete anything?
No. Nothing changes until someone makes a report, reads it and approves it. Results, report cards and fees records are always kept, without the name.

A parent asked to delete their account. Do their payments disappear?
No. Completing the request closes the account and clears its personal details. Fees payments and receipts are kept, as the law requires.

Take a full copy of the school's data

Download everything your school has in School Dynamics as one ZIP file of spreadsheets, with the report-card PDFs and photos if you want them.

For: School owner, School administrator · app.schooldynamics.ug/help/setting-up/data-export

Data export gives the school a full copy of everything it has in School Dynamics, as one ZIP file the school keeps: every list (students, parents, staff, classes, marks, report cards, fees and payments, and the rest), one spreadsheet (CSV) per list, with your school's rows only. You can add the report-card PDFs and the photos.

Open it from **Settings › Data export**.

Before you start

- Only the school's owner and the school administrators can make and download an export.
- The demo school cannot make exports.

Make an export

1. Tick **Include the report-card PDFs and photos** if you want them. The file is then much larger.
2. Press **Make an export**. The button says **Being built…**.
3. Wait. The export is built in the background and the page checks on it by itself; you can leave the page and come back.
4. When the export shows **Ready until** a date, press **Download** beside it.

The list shows the last ten exports, with when each was made, what it holds (*Lists*, or *Lists, report cards and photos*, and how many rows in how many lists), its state and its size.

State	Means
Being built	Still being made. Only one export is built at a time.
Ready until …	Ready to download until that day.
Expired	Older than seven days: the file is deleted. Make a new one.
Failed	It could not be made. Try again, or ask School Dynamics support.

> ⚠ **CAREFUL**
>
> The file holds children's and parents' personal details. Keep it somewhere safe, and do not send it by email or WhatsApp.

Good to know

- Passwords, keys and codes used to sign in are never included, whatever the list.
- Making an export and downloading it are both written in the school's audit log, with who did it.
- The download link works for seven days; then the file is deleted from School Dynamics.

QUESTIONS

What is in the export?
Every list the school has in School Dynamics (students, parents, staff, classes, marks, report cards, fees and payments, and the rest), one spreadsheet (CSV) per list, with your school's rows only. Passwords and keys are never included.

How long does the download link work?
Seven days. After that the file is deleted and the export shows as expired; make a new one.

Can I make two exports at once?
No. While one is being built, the button waits. Make the next one when it is ready.

The audit log

Read who changed what in the system and who opened a child's sensitive records, search the log, and check that no line has been changed.

For: Head teacher, School administrator, School owner · app.schooldynamics.ug/help/setting-up/audit-log

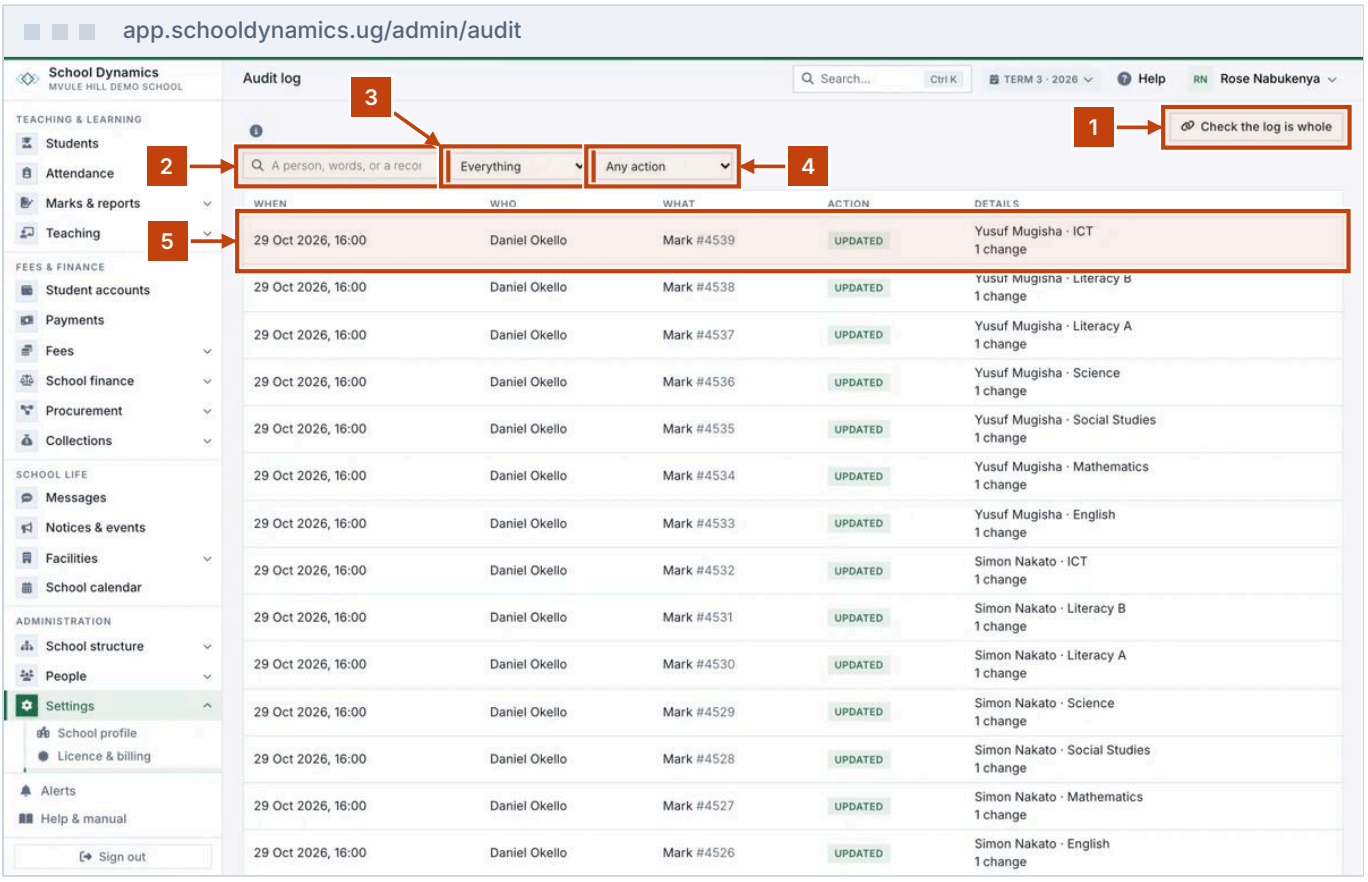
The audit log is the school's record of who changed what in the system: marks, payments, report-card releases, records and settings. It also records who opened a child's sensitive records, such as the sick bay, discipline, the full profile or an export. Read it when a figure changed and you need to know who changed it, and when.

Open it from **Settings › Audit log**.

Before you start

- The school administrator, the head teacher, the deputy and the school's owner can read the log.
- No one can change or delete a line from the system.

Reading the log



The demo school · invented names and figures

1 Check that no line has been edited or removed.

2 Search for a person, words, or a record's number.

3 Only one kind of record: payments, marks, settings...

4 Only one kind of action.

5 One line: when, who, which record, what was done, and the details.

The newest line is at the top. Each line 5 says:

- **When**: the day and time.
- **Who**: the person, or *The system* for work School Dynamics did by itself.
- **What**: the kind of record and its number, for example *Transaction #10234*.
- **Action**: what was done, such as *Updated*, *Viewed* or *Deleted*.
- **Details**: a sentence about it, the reason when one was given, and, when fields changed, a link such as *3 changes*. Click it to see each field, from what to what.

Only the fields that changed are kept, never passwords.

Find something

- Type in the search box 2 : a person's name, words from the details, or a record's number.
- Choose **What it is about** 3 to see one kind of record only.
- Choose an **Action** 4 to see one kind of action only.

> **TIP**
>
> To see everything one person did, type their name. To see the history of one record, type its number and choose what it is about.

Check the log is whole

Each line is chained to the one before it, so a line edited or removed afterwards breaks the chain. Press **Check the log is whole** 1 :

- *The log is whole: no line has been edited or removed.* All is well.
- *The log does not fit together …: a line was edited or removed.* Tell School Dynamics support at once.

What is recorded

Among others:

- changes to the school's settings, and to staff members' roles;
- payments and other fees lines changed, reversed or deleted, and each term's fees billed;
- marks changed, and report cards released;
- parents' consent answers, requests to delete accounts and how they were decided;
- data exports made and downloaded;
- who opened a child's sensitive records.

QUESTIONS

Can someone delete a line from the log?
Not from School Dynamics: the log has no edit or delete. Each line is chained to the one before it, so **Check the log is whole** shows if a line was ever edited or removed.

Are passwords in the log?
No. Only the fields that changed are kept, never passwords.

Who is The system?
Work done by School Dynamics itself rather than by a person signed in, such as a scheduled job.

03

Students

Admit, find, move and look after students, their parents, photos, documents and records.

Everything about a student lives on their page: class, parents, fees, marks, attendance and documents. This chapter shows how students come in (one by one, from a spreadsheet or by online application), how to find them, and how they move through the school.

Find a student	4 min
Admit a student	5 min
Import students from a spreadsheet or SchoolPay	5 min
A student's page	4 min
Student photos	2 min
Change a student's class and promote a class	4 min
Parents and guardians	3 min
Online applications	4 min
Letters, ID cards and exports	5 min
Discipline and conduct records	2 min
Answer a parent's request for their child's records	1 min
Students who leave	2 min

Find a student

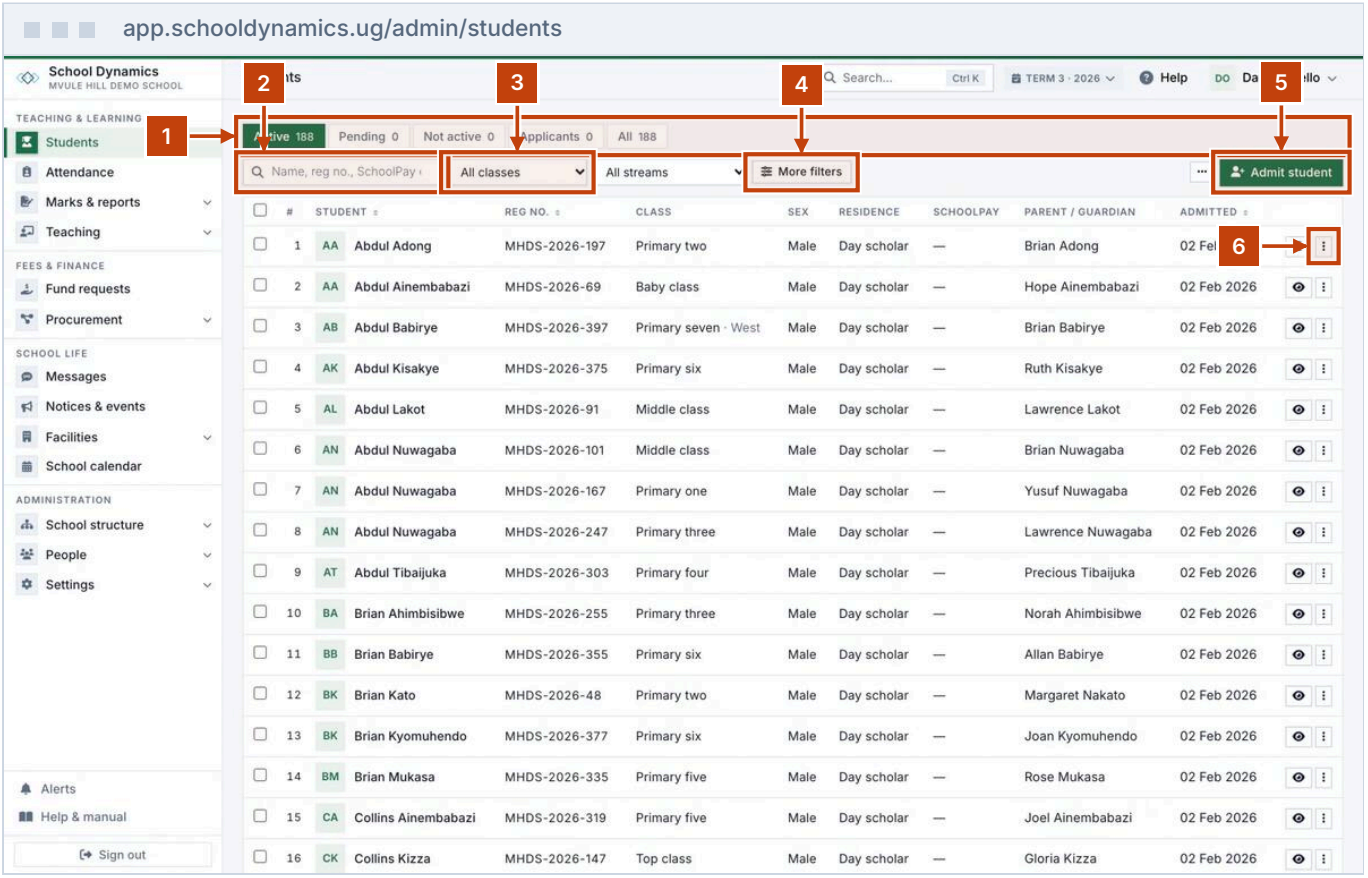
Search and filter the students list, look at a student in a quick view without leaving the list, and use the row menu and the ticked-student actions.

For: Secretary, School administrator, Director of studies, Head teacher, Teacher, Bursar · app.schooldynamics.ug/help/students/finding-students

The students list is where you look up a student, check who is in a class and act on many students at once. Open it from **Teaching & learning › Students**.

Anyone on staff who works with students can open it: teachers, the head teacher, the director of studies, the bursar, the secretary, the warden and the nurse. Only the school administrator, the director of studies and the secretary can admit, edit or move students.

Reading the list



The demo school · invented names and figures

1. The status tabs, each with how many students it holds.
2. Search by name, reg no., SchoolPay code or phone number.
3. Show one class. Classes are grouped by year.
4. Sex, day or boarding, SchoolPay code, admission dates and more.
5. Admit a new student.
6. The row menu: full profile, admission letter, edit, status, class.

The tabs at the top 1 sort students by their status:

Tab	Who is on it
Active	Students in school now. The list opens here.
Pending	Admitted but not yet active, for example waiting to report.
Not active	Students who left or finished school.
Applicants	Students the old system made from online applications.
All	Everyone, with a **Status** column.

Each row shows the photo (or initials), the name, the reg no., the class and stream, sex, day or boarding, the SchoolPay code, the parent or guardian with their phone, and the day the student was admitted. A student with no class shows a red **No class** label.

Click the **Student**, **Reg no.** or **Admitted** heading to sort by it.

Searching and filtering

- Type in the search box 2. It finds a name, a reg no., a SchoolPay code, a LIN or a phone number. With seven or more digits it also finds the guardian's, father's and mother's numbers, however the number was written.
- Choose a class 3. Classes are grouped by academic year, and the active year is marked. **No class** finds students without one. When a class has streams, a stream box appears beside it.
- Press **More filters** 4 for sex, day scholars or boarders, the SchoolPay code (**Has a SchoolPay code**, **No SchoolPay code**, **Code shared with another student**) and the dates a student was admitted. Schools with theology classes also get the theology class and stream here.
- **Clear filters** puts everything back.

The counts on the tabs follow your search and filters, so you can see at once how many of a class are pending or not active.

> TIP
>
> To find a student from any page, press Ctrl + K and type their name. See Finding your way.

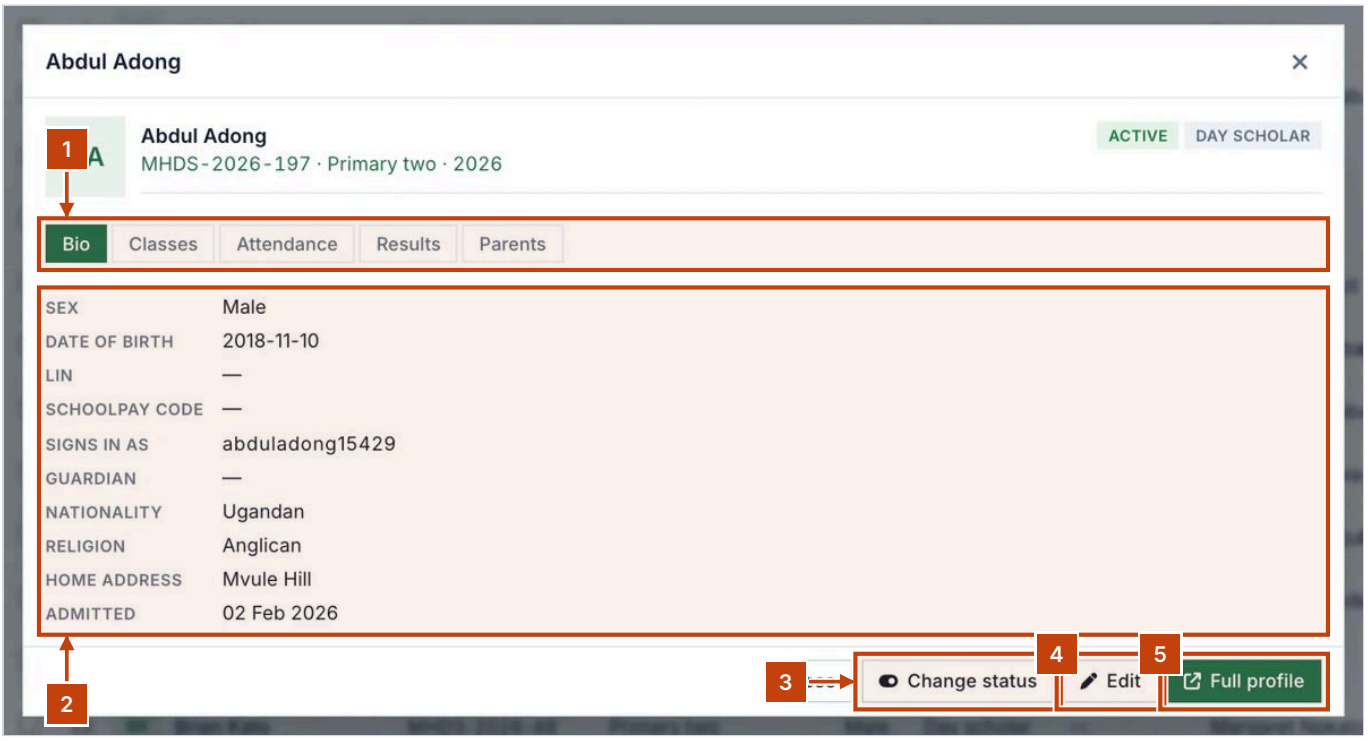
The row menu

The ⋮ button at the end of each row 6 is the student's row menu. It holds:

- **Full profile**: the student's own page.
- **Admission letter**: the student's admission letter as a PDF, in a new tab. See Documents and ID cards.
- **Edit details**, **Change status** and **Change class**, for those who manage students.

Looking at a student without leaving the list

Click a student's name, or the eye at the end of the row. The student's record opens in a quick view over the list.



The demo school · invented names and figures

1 The record, tab by tab: bio, classes, attendance, results, parents.

2 The tab's facts.

3 Change the student's status.

4 Edit the student's details.

5 Open the student's own page.

The quick view has the same tabs as the student's own page 1: **Bio**, **Classes**, **Fees** (for those who see fees), **Attendance**, **Results** and **Parents**. The facts of the open tab show below 2. On the **Fees** tab, the bursar can open the fees account or record a payment from here.

At the bottom, **Change status** 3 and **Edit** 4 open the same dialogs as on the list, and **Full profile** 5 opens the student's page. **Close** or Esc takes you back to the list where you were.

A student's name is a quick view link everywhere in School Dynamics: on roll-calls, class lists, discipline records and more.

Acting on many students at once

Tick the students in the first column, or tick the box in the heading to tick the whole page. When the list has more pages, **Select all … matching** takes every student that matches your search and filters.

A bar appears with the actions: **Status**, **Promote**, **Class**, **Stream**, **Sex** and **Reg. numbers** (and **Theology stream** at schools with theology classes). Each one opens a dialog that says exactly what will happen, and who will be left as they are and why, before you confirm. See Changing class and promotion and Students who leave.

GOOD TO KNOW

A long action carries on while you work elsewhere. Its progress shows at the top of the list and in the progress tray, and only one batch action runs for a school at a time.

Students without a registration number

If some active students have no reg no., a yellow line says how many. Press **Give them numbers** to number them all. The number is the school's short name, the year the student was admitted and their record number, for example MHDS-2026-1042. Students who already have a number keep it.

More student pages

The ⋯ button at the right of the toolbar opens **Class lists**, **Promotions** and **Optional subjects** (see Changing class and promotion) and, for those who manage students, **Export**: a CSV file of every student on the tab you are on who matches your filters.

QUESTIONS

Why can I not see the Admit student button or the tick boxes?
They are for the school administrator, the director of studies and the secretary. Other staff who may see students can search, filter and open them, but not change them.

A student I admitted last year is not on the list. Where are they?
The list opens on the **Active** tab. Look under **Pending**, **Not active** or **All**. If the student has no class, choose **No class** in the class filter.

Can I search by a parent's phone number?
Yes. Type at least seven digits. The search looks in the student's own phone numbers and the guardian's, father's and mother's numbers on the student's record, in any way the number was written.

How do I get the list into Excel?
Press ⋯ at the right of the toolbar, then **Export**. You get a CSV file of every student matching the filters on the tab you are on, not only the page you see. For a spreadsheet with the columns you choose, use Exports.

Admit a student

Add a new student in one dialog, and see what the system does for you - the reg no., the fees account, the class record, the parent and this term's fees.

For: Secretary, School administrator, Director of studies · app.schooldynamics.ug/help/students/admitting-a-student

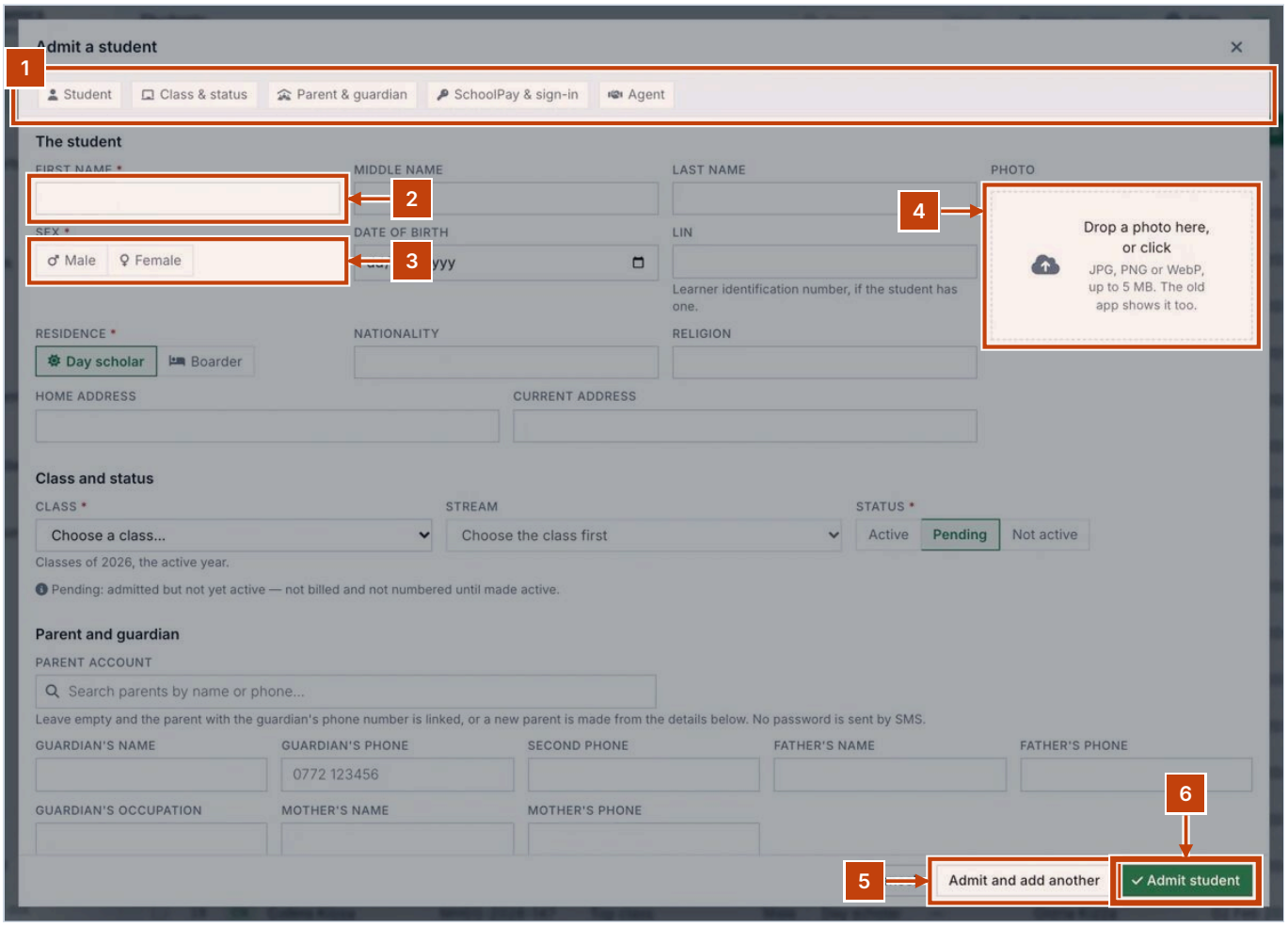
Admitting a student puts them on the register in one step. You fill one dialog, and the system does the rest: the reg no., the fees account, the class record, the parent account and, for an active student, this term's fees.

To bring in many students at once, use Importing students. Students who apply online are admitted from Online applications.

Before you start

- You need to be the school administrator, the director of studies or the secretary.
- The school needs an active academic year with its classes. If it has none, the dialog says *This school has no active academic year, so students cannot be placed in classes.* Set one up under › **Academic years**.
- To bill fees when you admit an active student, the class's fees for the active term must be set. See Fee structure.

Admit a student



The demo school · invented names and figures

1. Jump to a part of the form.
2. First name: the only name you must give.
3. Choose the sex: it is required.
4. Drop a photo here, or click to choose one.
5. Admit, and start again with the same class.
6. Admit the student.

1. Open **Teaching & learning › Students** and press **Admit student**. If the list is showing one class of the active year, that class is already chosen in the dialog.
2. Type the first name 2. Middle and last names are optional, but a full name is best.
3. Choose the sex 3. Residence is **Day scholar** unless you choose **Boarder**. Add the date of birth, LIN, nationality, religion and addresses if you have them.
4. Add a photo 4 if you have one: JPG, PNG or WebP, up to 5 MB. See Photos.
5. Under **Class and status**, choose the class (only the active year's classes are listed) and the stream if the class has streams.
6. Choose the status: **Pending** (the default), **Active** or **Not active**. The line under it says what each one means.
7. Under **Parent and guardian**, type the guardian's name and phone, and the father's and mother's if you have them. Leave **Parent account** empty unless you know the parent is already in the system; then search for them by name or phone.
8. Under **SchoolPay and sign-in**, type the SchoolPay payment code if the student has one.
9. Press **Admit student** 6, or **Admit and add another** 5 to keep the class, stream, status and residence for the next student.

The chips at the top 1 jump to each part of the form: **Student**, **Class & status**, **Parent & guardian**, **SchoolPay & sign-in** and **Agent**.

When the student is saved, a message at the bottom says what was done, and the new student opens in a quick view over the list.

What the system does for you

When you admit a student, School Dynamics does all of this on its own:

- **A fees account.** Every student gets one. See Student accounts.
- **A class record** for the class (and stream) you chose, in the active year.
- **A parent account.** If you picked a parent, the student is linked to them. If not, the system looks for a parent of the school with the guardian's phone number and links them. If there is none, it makes a new parent account from the guardian details (the father's name first, then the mother's, then the guardian's). The message says *Parent … added; no password was sent* or *Linked to parent …, found by phone number*. With no guardian name or phone, no parent is made.
- **A sign-in name.** A student with a SchoolPay code signs in with it, unless you type another name under **Sign-in name**. If someone else already signs in with that code, the message gives the name the student got instead.

For an **active** student, also:

- **A reg no.**, made from the school's short name, the year and the student's record number, for example MHDS-2026-1042.
- **This term's fees** for the class, each fee once. The message says *Billed UGX … in fees for ….* If a fee could not be billed, the message says why; the student is still saved.
- At schools with theology classes, a place in the theology class you chose.

A **pending** student gets none of these three until you make them active. See The student's page.

Rules the dialog checks

- First name, sex, residence and class are required.
- The class must be a class of the active year, and the stream must be one of that class's streams.
- A SchoolPay code belongs to one student of the school only. A LIN belongs to one student only; words like "N/A" or "None" count as no LIN.
- **Applicant** cannot be chosen: applicants come only from online applications.

If something is wrong, the field turns red with the reason and the message *Check the highlighted fields.* Nothing is saved until every field is right.

Changing a student's details later

Open the student (from the list, their quick view or their page) and press **Edit details** (or **Edit**). The same dialog opens with **Save changes**. The same things follow a save: a parent is found or made if the student has none, and a student who becomes active is numbered and billed.

> ⚠ CAREFUL
>
> Moving an active student to another class takes back the old class's fees billed to them for the active term, and bills the new class's fees. The message after saving says how much was reversed. See Changing class and promotion.

If you change the SchoolPay code and the student signed in with the old code, their sign-in name follows the new code, unless someone else already signs in with it. The message says which happened.

Marketing agents

If an agent brought the student to the school, tick **Brought to the school by a marketing agent** and choose the agent, the commission in UGX and whether it is paid. Only staff with the Marketing agent role are listed. The students list can then be filtered by agent under **More filters**.

QUESTIONS

Should I admit a student as Active or Pending?
Pending when the student has not reported yet. Nothing is billed and no reg no. is given until you make them active. Active when the student is in school now; they are billed this term's fees for their class at once.

Can I put a new student in last year's class?

No. Students are placed only in classes of the active academic year. If the class you want is missing, add it under Classes.

Does the parent get a text message with a password?
No. When the system makes a parent account from the details you type, no password is set or sent. The parent signs in with a one-time code; see Signing in with a code.

I typed a SchoolPay code and it was refused.
Each student needs their own code. The message names the student who already has it, for example *SchoolPay code … already belongs to …*. Check the code, or fix the other student's record.

Can I delete a student I admitted by mistake?
Students are never deleted. Mark the student **Not active**; see Students who leave.

Import students from a spreadsheet or SchoolPay

Admit many students at once from Excel or CSV, or register the students SchoolPay knows. Every row is checked and shown before anything is written.

For: Secretary, School administrator, Director of studies · app.schooldynamics.ug/help/students/importing-students

When a new term brings many new students, or a school starts using School Dynamics, you can admit them from a spreadsheet instead of one by one. You can also register the students who already pay through SchoolPay but are not on the register yet.

Open **Administration › People › Imports**.

Before you start

- You need to be the school administrator, the director of studies or the secretary.
- The school needs an active academic year with its classes: imported students are placed only in classes of the active year.
- Save the list as Excel (.xlsx or .xls) or CSV, one student per row, with a row of column headings. The file can be up to 10 MB and 5,000 rows.

> **GOOD TO KNOW**
>
> Nothing is written when you upload. Every row is checked first, and the page shows exactly what each row will do. Students already here (the same SchoolPay code, the same reg no., or for a row with neither, the same name in the same class) are found and left as they are.

Import students from a spreadsheet

1. Press **Students from a spreadsheet**.
2. Type a title you will recognise, such as *New P.1 pupils, Term 1* (optional: the file name is used otherwise).
3. Drop the spreadsheet in the box, or click to choose it.
4. Press **Upload and choose columns**. The import's own page opens.
5. Under **1. Choose the columns**, check the **Headings are on** row and, if the file has several sheets, the **Sheet**.
6. Say whether **The names are In one column** (first word, middle words, last word) or **In separate columns**.
7. Check each field's column. The system guesses them from the headings; choose **Not in the sheet** for a field the file does not have.
8. Under **For every row**, choose **One class for every row** if the whole sheet is one class, or leave it to read each row's class from the class column.
9. Choose whether **New students are Pending** or **Active**, and the residence and sex to use when a row does not say.
10. Press **Save and check every row**.

Checking writes nothing. The page then shows how many rows are **Ready**, how many have **Problems**, how many have **Nothing to do** (already here, or left out) and how many are **Imported**.

Fixing the rows with problems

A row is a problem when it cannot be admitted as it is: no name, no or unknown sex, no class of the active year, a stream the class does not have, a phone that is not a phone number, a SchoolPay code two students already share, two rows for the same student, or a student of the same name already in the class. The **What happens** column says which.

For each row you can:

- Press the pencil (**Correct row ...**): change the names, sex, class, stream, residence, SchoolPay code or reg no., then **Save and check**. When a student of the same name is already in the class and this is another child, tick **Admit anyway: this is another child with the same name**.
- Press **Male** or **Female** on a row that only lacks the sex.
- Leave the row out with the crossed circle on the row (or **Leave it out** in the row's quick view). Nothing is written from it. **Take it back in** undoes that.

Corrections are kept with the import; **Read it from the import again** forgets them. To fix many rows in Excel instead, press **Rows to fix (Excel)**, correct the file and upload it again as a new import.

If you change the columns or choices later (**Change the columns**), check the rows again before importing.

Import

Press **Import ... rows** and confirm. The confirmation says how many students will be admitted and whether as pending or active.

The import runs on its own: you can leave the page, and the progress tray follows it. Each imported student gets exactly what a student admitted by hand gets: a fees account, a class record, a parent account found by phone or made from the parent columns, and, for active students, a reg no. and this term's fees. See Admit a student.

A row whose facts changed between the check and the import (for example, someone admitted that student by hand meanwhile) is stopped, not guessed. Check again to see what it would do now.

Rows marked **Imported** are final and never written again. **Cancel import** stops an import: nothing more is written from it, and rows already imported stay.

> ⚠ CAREFUL
>
> **Active** numbers every new student and bills their class's fees for the active term at once. Choose **Pending** if the students have not reported yet; you can make them active later from the students list.

Register the students SchoolPay knows

When parents pay through SchoolPay for children who are not on the register, those payment codes wait here.

1. Press **From SchoolPay**. The dialog says how many payment codes have paid through SchoolPay but belong to no student here.
2. Press **Gather and check the codes**. Each code becomes a row with the name, class and reg no. SchoolPay last gave; the class is matched to this year's classes.
3. Set the sex on each row with **Male** or **Female**, and correct anything else that is missing.
4. Press **Import ... rows**.

Students from SchoolPay are admitted as pending unless you choose otherwise under **For every code**. When every payment code already belongs to a student, there is no one to register and **Gather and check the codes** cannot be pressed. See SchoolPay.

The list of imports

The **Imports** tab lists every import with its rows ready, problems, rows imported and status. Click a title for a quick view, and **Continue** or **Open** to go back to it. On an import's page, **The file** downloads what was uploaded and **All rows** downloads every row with what happened to it.

The **Made in the old app** tab shows imports from the old system as they were left. Nothing can be run from there; to bring the same people in again, start a new import.

> **TIP**
>
> The same page imports student photos (**Photos**, see Photos) and, for the school administrator, staff (**Staff**, see Staff and their accounts).

QUESTIONS

What if I upload the same spreadsheet twice?
Nobody is added twice. The page says the same file was uploaded before, and every student already here shows as *Nothing to do*.

Which columns must the spreadsheet have?
Only the names, in one column or in separate columns. A class column is needed too, unless you choose one class for every row. Everything else is optional, and the columns can be in any order.

Can I bring in fees balances this way?
No. This page admits students. Balances and payments from a spreadsheet are brought in under Fees imports.

I left the page while it was importing. Did it stop?
No. The import carries on, and its progress shows in the progress tray on every page. Each row is written whole or not at all.

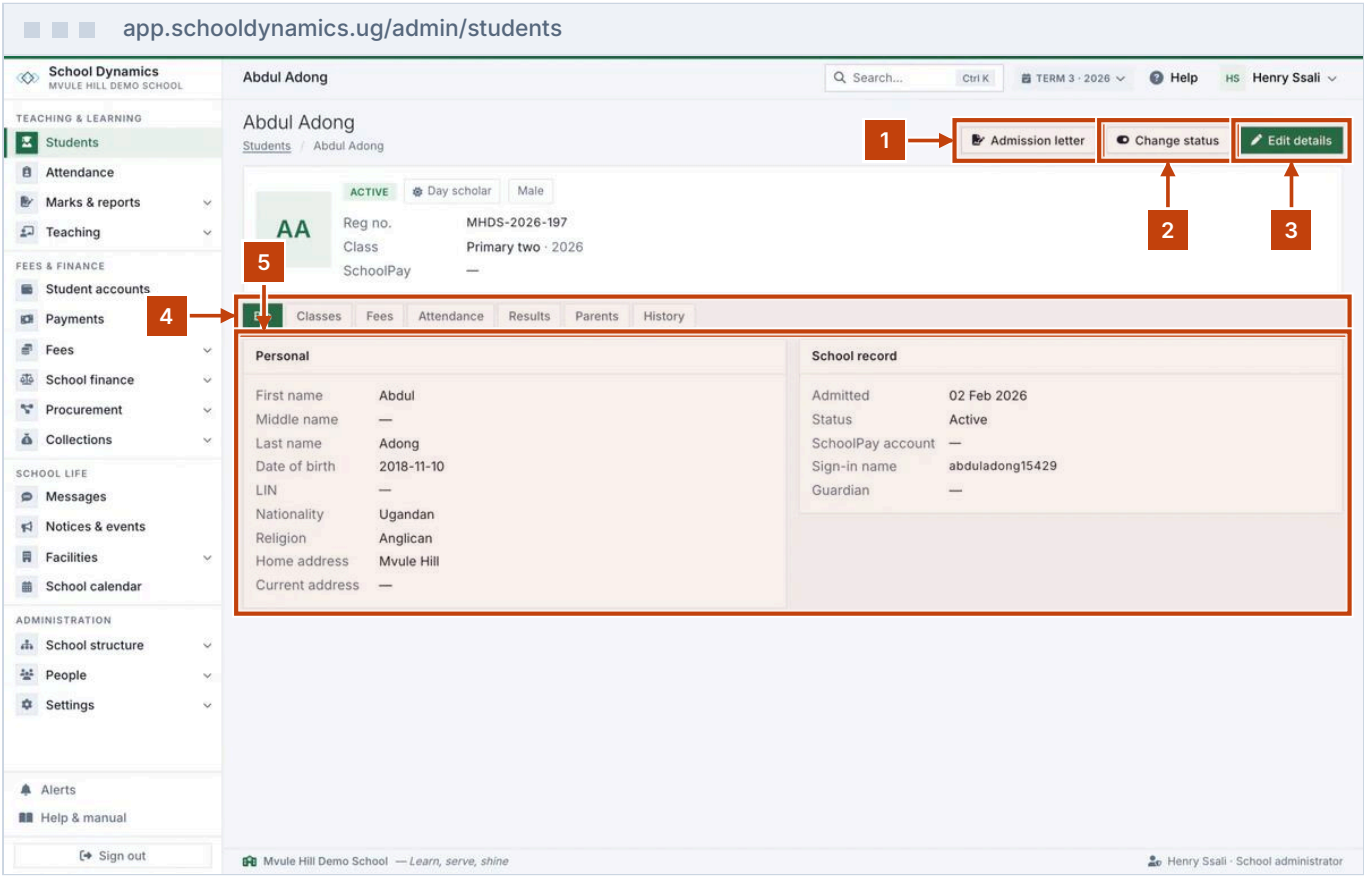
Can I try this in the demo school?
No. Imports are switched off in the demo school.

A student's page

Everything about one student on one page - bio, class history, fees, attendance, report cards, parents and who changed the record - and the buttons to act on it.

For: Secretary, School administrator, Director of studies, Head teacher, Teacher, Bursar · app.schooldynamics.ug/help/students/student-page

A student's page brings everything about one student together. Open it with **Full profile** from the student's quick view, or from the row menu on the students list.



The demo school · invented names and figures

1. The admission letter, as a PDF.
2. Active, pending or not active.
3. Change the student's details, class or parent.
4. The record, tab by tab.
5. The open tab: here the student's personal details and school record.

The top of the page shows the photo, the status, day or boarding, the sex, the reg no., the class and stream with its year, and the SchoolPay code. A click on the photo shows it full size.

Three buttons sit at the top right:

- **Admission letter** 1 opens the student's admission letter as a PDF in a new tab.
- **Change status** 2 makes the student active, pending or not active (see below).

- **Edit details** 3 opens the same dialog used to admit a student, to change any detail, the class or the parent.

Only the school administrator, the director of studies and the secretary see **Change status** and **Edit details**.

The tabs

The tabs 4 each show one part of the record 5.

Tab	What it shows
Bio	Names, date of birth, LIN, nationality, religion and addresses; when the student was admitted, the SchoolPay account, the sign-in name, the guardian, and the marketing agent if one brought the student.
Classes	The class history: one class record per year, with the stream and any optional subjects. At schools with theology classes, the theology classes too.
Fees	What the student owes (or holds in credit) over all terms, what was billed and paid this term, what was brought forward, and the latest lines of their account.
Attendance	The attendance rate, present and absent, for this term, the last 90 days or this year, by kind of roll-call.
Results	The student's report cards, term by term, with marks, aggregates, division and position.
Parents	The parent account, brothers and sisters at the school, and the guardian details on the student's record.
History	Who changed or opened this record. For the head teacher, the deputy and the school administrator.

Classes

Change class opens the edit dialog, where you choose the new class. The branch icon on a class record changes only that year's stream; if it is the current class, the student's stream changes too. See Changing class and promotion.

Fees

Fees account opens the account's quick view and **Statement** opens it as a PDF; the bursar also has **Record payment** here. If some of this term's fees for the student's class are not billed yet, a yellow line says how much; for an active student, the bursar's **Bill now** bills them. See Student accounts and Record a payment.

Attendance

Choose **This term**, **Last 90 days** or **This year**. The figures count closed roll-calls only, and only for a student who is active. See The attendance dashboard.

Results

Each report card opens with the arrow at the end of its row, for those who may read report cards. A student with no report cards yet says *No report cards have been generated for this student yet.*

Parents

The left card shows the linked parent account: name (a link to the parent's page), phone, email and sign-in name, and any **Brothers and sisters here**. **Link a parent** (or **Link another parent**) and **Unlink** change it. With no parent linked but guardian details on the record, **Find or create the parent** links a parent with the guardian's phone number, or makes one; no password is sent. See Parents and guardians.

The right card, **Guardian details on the student's record**, shows the guardian, second phone, occupation, father and mother as typed on the student's record.

History

Every change to the record (what changed, from what to what) and every time someone opened the record, a discipline record or a sick-bay visit, newest first. The top line says whether the parent agreed to the child's photos being used in public: **Agreed**, **Said no** or **Not asked (no)**. See Data protection.

Changing the status

Press **Change status**, choose **Active**, **Pending** or **Not active**, and press the button (**Make active**, **Mark pending** or **Mark not active**). The dialog says what each one does:

- **Active**: needs a class of the active year. The student gets a reg no. if they have none, and is billed this term's fees for their class that are not billed yet.
- **Pending**: admitted, not yet active. Nothing is billed.
- **Not active**: left or graduated. Class records, results and balances stay; nothing is billed. See Students who leave.

If the student cannot become active, the dialog says why, for example *The student cannot be made active: … is not a class of …. Put them in a class of the active year first.* Use **Edit details** to choose a class of the active year, then try again.

QUESTIONS

Why do I not see the Fees tab?
The Fees tab is for those who see the school's money - the bursar, the head teacher, the deputy and the school administrator.

A student's Attendance tab is empty. Why?
It counts closed roll-calls only, and active students only. A roll-call still being taken, or a student who is pending or not active, shows nothing there.

How do I open a student's page from another page?
Click the student's name anywhere to open the quick view, then press **Full profile**. Hold `Ctrl` while you click the name to open the page in a new tab.

Student photos

Add a student's photo, upload a whole class's photos at once, see any photo full size, and download photos for ID cards.

For: Secretary, School administrator, Director of studies · app.schooldynamics.ug/help/students/photos

A student's photo shows on the students list, in the quick view, on the student's page, on roll-calls and on ID cards. You can add photos one at a time or a whole class at once.

Before you start

- Adding and changing photos is for the school administrator, the director of studies and the secretary.
- A photo is a JPG, PNG or WebP picture of up to 5 MB.

Add or change one student's photo

1. Open the student and press **Edit details** (or **Edit** in the quick view).
2. Drop the photo in the **Photo** box, or click the box to choose it.
3. Check the preview. **Keep the old photo** cancels the new one before you save.
4. Press **Save changes**.

You can add the photo when you admit the student too.

See a photo full size

Click any student's photo: on the list, in the quick view or on the student's page. It opens full size over the page, even over an open dialog. The button at the top opens the photo in a new tab; `Esc`, the close button or a click on the dark area closes it.

A student without a photo shows their initials instead.

Upload many photos at once

Name each picture file by the student's SchoolPay code (*1003839865.jpg*), reg no. (*MHDS-2026-1042.jpg*) or name (*Amina-Nakato.jpg*). Then:

1. Open **Administration › People › Imports** and press **Photos**.
2. Choose how **Each picture is named by the student's**: **SchoolPay code**, **Reg no** or **Name**.
3. If the pictures are named by name, choose the class: names are looked for in that class first, then in the whole school.
4. Drop the pictures in the box, or click to choose them. You can choose many at once, up to 1,000.
5. Press **Upload and match**. The import's page opens with every picture and the student it was matched to.
6. Fix the pictures with problems: **Choose the student** by hand, or leave the picture out.
7. Press **Import ... pictures** and confirm.

Nothing is saved until you import. A picture is a problem when it is not a picture, matches no student, matches several, or when two pictures are for the same student. Pictures are shrunk to at most 1,200 pixels.

> **TIP**
> To redo a class's photos in an editing program, download them first from Exports named by reg. no., edit them, and upload them back named by **Reg no**.

Photos and ID cards

An ID card batch lists everyone in it who has no photo, and their card prints their initials where the photo goes. Upload the missing photos, then print again. See Documents and ID cards.

> **CAREFUL**
> Using a child's photo in public (on the school's posts, website or social media) needs the parent's consent. The **History** tab on the student's page shows whether the parent agreed. See Data protection.

QUESTIONS

Is the old photo deleted when I upload a new one?
No. A new photo replaces the one shown, but the old file stays on the server.

My pictures are named by the students' names. Will that work?
Yes. Choose **Name** and, if you can, the class. Dashes and underscores count as spaces, and capitals do not matter. A name that matches two students is shown as a problem, and you choose the student by hand.

Why does an ID card show initials instead of a photo?
That student has no photo yet. The ID card batch lists everyone without one before you print.

Change a student's class and promote a class

Move one student or many to another class or stream, promote a class at the start of a year by hand or by results, and keep class lists and optional subjects right.

For: Director of studies, Secretary, School administrator · app.schooldynamics.ug/help/students/changing-class-and-promotion

A student's class for each year is kept as a class record. Their current class is their class record in the active year. This lesson shows how to move students between classes and streams, and how to promote a whole class when a new year begins.

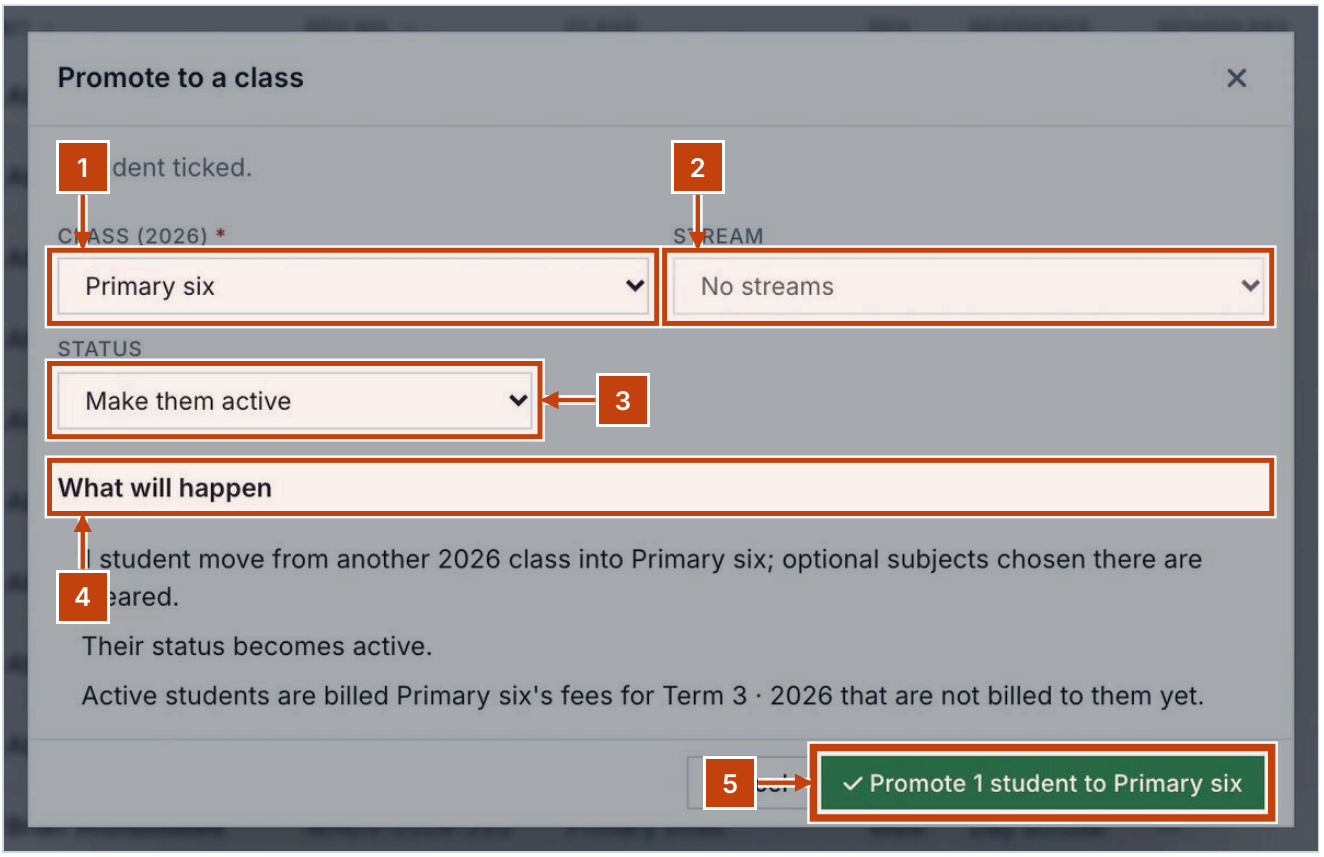
Before you start

- Moving students is for the school administrator, the director of studies and the secretary.
- Students are only ever placed in classes of the active academic year. At the start of a new year, make the year active and set up its classes first: see Academic years and terms and Classes and streams.

Move one student

Use the row menu **Change class** on the students list, or **Edit details** on the student's page and choose the new class. On the page, the branch icon on a class record changes only the stream.

Move or promote many students



The demo school · invented names and figures

1. The class, from the active year's classes.
2. The stream, if the class has streams.
3. Keep their status, or make them active, pending or not active.
4. What will happen, before anything is done.
5. Confirm: the button says how many students move, and where.

1. On **Teaching & learning › Students**, filter the list to the students you want (for example one class) and tick them, or tick the whole page. **Select all … matching** takes every page.
2. Press **Promote** (to move them up and make them active) or **Class** (to move them and keep their status).
3. Choose the class 1 and, if it has streams, the stream 2.
4. Choose the status 3: **Keep their status**, or make them active, pending or not active. **Promote** starts at *Make them active*.
5. Read **What will happen** 4. It says who gets a new class record, who moves from another class of the same year, who only changes stream, and which fees will be billed. Students who would not change are listed under *… left as they are*, with the reason.
6. Press the button 5, for example **Promote 32 students to …**.

The work carries on while you use other pages, and a message says how many were moved.

The same bar has:

- **Stream**: put the ticked students in one stream. Students not in that stream's class move to that class too.
- **Theology stream**, at schools with theology classes: place them in a theology class and stream. Their ordinary class does not change.
- **Status**: see Students who leave.
- **Sex** and **Reg. numbers**: correct the sex, or give reg nos. to active students without one.

> ⚠ CAREFUL
>
> Fees follow the class. A student made active, or moved into a class, is billed that class's fees for the active term that are not billed to them yet. An active student moved out of a class during the term has that class's fees for the term taken back. Check the fee structure of the new class before moving students in the middle of a term.

A student has one class a year. Moving a student to another class of the same year moves their class record (it does not add a second one), and clears the optional subjects they chose in the old class.

Promote by results

Promotions moves the students of a class whose report card meets a rule. Open it from the ⋯ menu on the students list, **Promotions**.

1. Press **New promotion**.
2. Choose the **From class** (classes with report cards, by year) and the **To class** (a class of the active year).
3. Choose **Who is promoted**: **By total marks**, **By division**, **By position in class**, or **One student**.
4. Choose the term under **Report cards of**, and the pass mark: the lowest total mark, the divisions that pass (from **Division 1** to **Any division (1–4)**), or the lowest position.
5. Press **Preview who moves**. A table lists every student with their marks, division and position, and **Promoted** or *Stays* with the reason.
6. Press **Promote … students**.

Only the previewed list is promoted. If anything changed since the preview (a new report card, a student moved), the page says *The list changed since you looked at it* and you preview again. By division, a card with no division never passes; by position, a card with no position never passes. Students marked **Not active** are left out, and students already in the new class are skipped. Their status does not change.

Every run is kept in the list on the **Promotions** page: when, from and to which class, the rule, the report and how many were promoted.

Class lists

Class lists (from the same ⋯ menu) shows every student's class in each year, past years included. Choose the year (the active year at first), a class and a stream, or search a name or reg no. **Export** gives the list in Excel or CSV.

- **Add an enrolment** puts a student in a class of any year, for example a class record that was missed. If the student already has a class that year, they are moved.
- When a student is in the same class twice, the row says **Duplicate**. **Remove** takes away the extra one; the other stays. Tick **Duplicates only** to see them all.

Optional subjects

Optional subjects (from the same menu) is where you tick the optional subjects each student takes. Choose a class of the active year: each optional subject is a column, with **All** and **None** to tick or untick it for everyone shown. Tick or untick, then press **Save choices**; **Undo changes** forgets what you have not saved.

A class's optional subjects are marked on the class page first. See Subjects.

QUESTIONS

When do I promote students to the next class?

After the new academic year is made active and its classes exist. Students are moved only into classes of the active year. See Academic years and terms.

A student must repeat the class. What do I do?

Leave them out of the promotion. With **Promote by results**, they stay because they do not meet the rule. With **Promote** on the list, do not tick them, then move them into the same class level of the new year with **Class**.

Are the old year's marks and report cards lost when a student is promoted?

No. Promoting adds a class record for the new year. The old year's class record, marks, report cards and balance stay.

I moved a student by mistake. Can I undo it?

Move them back the same way. If fees were reversed and billed by the move, moving back bills the old class's fees again.

Parents and guardians

Find a parent, see their children, add a parent, and link or unlink children - from the Parents list or from a student's own page.

For: Secretary, School administrator, Director of studies · app.schooldynamics.ug/help/students/parents-and-guardians

Every student can be linked to a parent account: the parent's own record, with the phone number they are reached on and the sign-in for the parents' pages and app. A parent can have several children at the school.

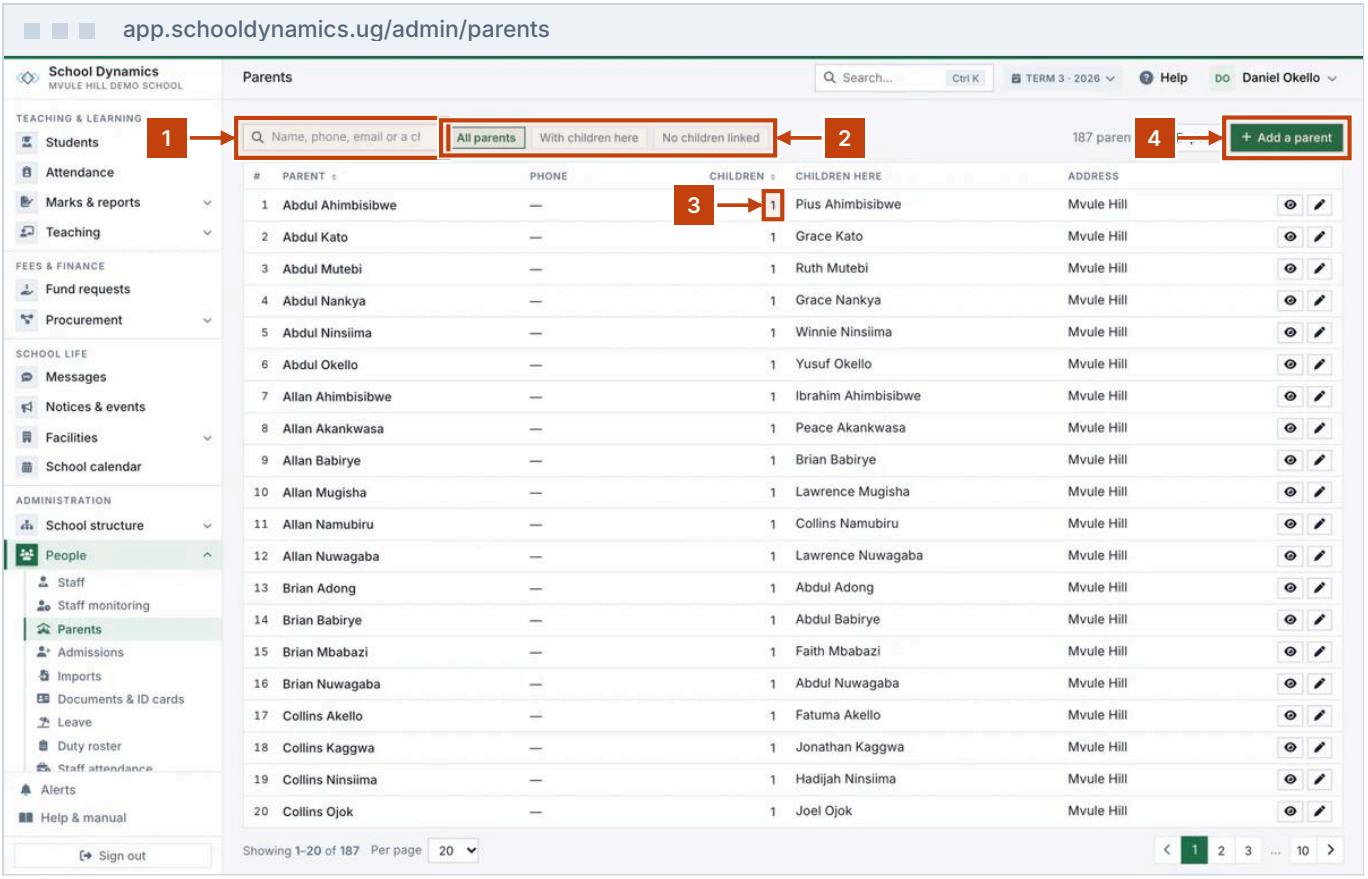
Most parent accounts are made for you: when a student is admitted or imported, the parent is found by the guardian's phone number, or made from the guardian details. This page is for checking them and putting them right.

Before you start

- Anyone who may see students can look at parents. Adding, editing, linking and unlinking are for the school administrator, the director of studies and the secretary.

The Parents list

Open **Administration › People › Parents**.



The demo school · invented names and figures

1 Search by name, phone, email or a child's name.

2 All parents, those with children here, or those with none linked.

3 How many children; click to see them in the students list.

4 Add a parent by hand.

Each row shows the parent, the phone number they are reached on, how many children they have, the first children's names, and the address. Search 1 by name, phone, email or a child's name, and choose 2 **All parents**, **With children here** or **No children linked**.

Click the number of children 3 to open the students list showing only that parent's children, on the **All** tab.

Click a parent's name for their quick view: phone, email, sign-in name, address, and their children with each child's class and status. From there:

- **Link a child**: search a student by name or reg no. and press **Link**. A student who already has a parent account moves to this one.
- The unlink icon beside a child removes the link. Both records stay; only the link goes.
- **Edit** opens the parent's details, and **Full page** opens the parent's own page, with the same children and buttons.

For those who manage students, **Export** gives every parent matching your search as a CSV file, with their children.

Add a parent

1. Press **Add a parent** 4.
2. Type the first and last name. Both are required.
3. Type the mobile number, for example 0772 123456. It must be a real Ugandan number; the parent signs in with it when nobody else does.
4. Add a second number, email, address, occupation, nationality, religion and a photo if you have them.
5. Under **Children**, search for the parent's children and pick them. A child who already has a parent moves to this one.
6. Press **Add parent**.

A password is optional (at least 6 characters). Nothing is sent by SMS.

Change a parent's details

Press the pencil on the row, **Edit** in the quick view or **Edit details** on the parent's page, then **Save changes**. When you change the mobile number, the parent's sign-in name follows it, unless someone else already signs in with that number.

A student's parents

On the student's page, the **Parents** tab shows two things side by side:

- **Parent account**: the linked parent, their phone, email and sign-in name, and the student's **Brothers and sisters here** (other children of the same parent).
- **Guardian details on the student's record**: the guardian, second phone, occupation, father and mother, as typed when the student was admitted or edited.

The buttons on the left card:

- **Link a parent** (or **Link another parent**): search parents by name or phone and press **Link parent**. Linking replaces the parent the student had.
- **Unlink**: the student no longer has this parent account. The parent's account stays.
- **Find or create the parent**, when no parent is linked: the system looks for a parent of the school with the guardian's phone number and links them, or makes a new parent account from the guardian details. No password is sent.

If there is neither a guardian name nor a phone on the student's record, add them with **Edit details** first.

GOOD TO KNOW

When you unlink a student's parent, the system does not link one again by itself the next time the student is saved. Link the right parent by hand.

What parents can do

A parent with an account can see their children's fees, report cards and attendance on the parents' pages and in the parents' app. See What parents can do.

QUESTIONS

Why does a parent not get a password when I add them?
Nothing is sent by SMS. Set a password in the parent's dialog if they want one, or let them sign in with a one-time code from the parents' app. See Signing in with a code.

Two guardians share one phone number. Is that a problem?
No. Only one person can sign in with a number, so the second parent gets another sign-in name. Both are still reached on that number.

Can a student have two parent accounts?
No. A student is linked to one parent account. The father, mother and guardian are also kept as names and phone numbers on the student's own record.

Can I delete a parent?
No. Parents are never deleted. Unlink their children if they are not this family's parent.

Online applications

Read the applications parents send from the school's page, ask for changes, turn one down with a reason, or accept it - which admits the student and links the parent.

For: Secretary, School administrator, Director of studies · app.schooldynamics.ug/help/students/online-applications

Parents can apply for a place online, from the school's applications page, and upload the documents the school asks for. Their applications arrive on **Administration › People › Admissions**. You read each one, then accept it, ask for changes or turn it down. The applicant follows every step on their private link.

Before you start

- You need to be the school administrator, the director of studies or the secretary. Accepting admits a student.
- Parents can apply only while online applications are switched on. If they are off, the page says *Online applications are switched off*. The school administrator switches them on under › **School profile**, **Online applications**. See School profile.

Reading the list

The figures at the top count the applications **New, waiting**, **Under review**, **With the applicant** (changes requested) and **Accepted**. The tabs sort them the same way: **New**, **Under review**, **Changes requested**, **Accepted**, **Not accepted**, **Not sent yet** (started but not sent), **Cancelled** (only when there are some) and **All**.

Search by name, application number, phone or email, and filter by the class applied for, the sex and the dates sent. The **Documents** column shows how many of the required documents came in, in red when some are missing.

Read an application

Click the applicant's name. The application opens in a quick view with the student, the class applied for and the previous school, the parent or guardian, the contact details, every document (open each one over the page, or in a new tab) and the history of what happened.

Notes for staff are kept with the application and never shown to the applicant; press **Save notes**.

Decide

The buttons at the bottom of the quick view, and the row menu, do the same things.

Start the review moves a new application to **Under review**, so others know someone is on it.

Ask for changes sends the application back to the applicant with your message (**What should change**). It shows on their link, above their form. When they send it again, it comes back to **New**.

Turn down needs a **Reason** of at least ten characters. The applicant reads it on their link, so be clear and kind.

Accept opens a dialog with two ways:

1. Choose **Admit a new student**, or **Already on the register** if the child is already a student here. If a student with the same name is on the register, a yellow line names them.
2. For a new student, choose the **Class** (the class applied for is shown as a hint), the **Stream**, **Day or boarding** and the **Status**: **Pending — joins when they report** or **Active now**.
3. Leave **Parent** empty to link the parent with the applicant's phone number, or make one from the application. Choose a parent only to use another one.
4. For a student already on the register, search and choose **The student** instead.
5. Add **Notes for staff** if you want.
6. Tick **Tell the applicant, with the link to their application** and choose who gets it: SMS to the parent or the contact number, email to the parent or the contact address.
7. Press **Accept and admit** (or **Accept and link**).

A new student is admitted exactly as one admitted by hand: a fees account, a class record, the parent account, and, for **Active now**, a reg no. and this term's fees.

If the application's own details cannot make a student (for example a detail the student form refuses), the dialog says which, and you ask the applicant to correct them with **Ask for changes**.

> ⚠ CAREFUL
>
> Telling the applicant by SMS uses the school's SMS credit, like any message. If SMS is not switched on for the school, only emails can go. See How SMS works.

Message the applicant

Message the applicant... (row menu) or **Message** (quick view) sends a message about the application: choose who gets it, type the message and, if you want, tick **Add the link to their application**. The dialog shows how many SMS parts it makes. Press **Send message**.

The admission letter

Once an application is accepted and linked to a student, **Admission letter** in the row menu opens the student's admission letter as a PDF. The applicant can download it from their link too. To change the letter's words, see Documents and ID cards.

QUESTIONS

How do parents apply?
On the school's online applications page. Switch it on under **School profile**, Online applications; the **The applications page** button then opens it, so you can share the link.

Two of us pressed Accept at the same time. Are there two students now?
No. Accepting the same application twice admits one student; the second finds the application already accepted and changes nothing.

The child is already on our register. Will accepting make a second record?
Not if you choose **Already on the register** when you accept. The application is linked to that student and nothing new is added.

Does accepting bill fees?
Only if you choose **Active now**. A pending student is billed when they are made active.

Letters, ID cards and exports

Print admission letters and your own letters for a student or a class, make and print ID cards, and download student lists and photos.

For: Secretary, School administrator, Director of studies, Head teacher · app.schooldynamics.ug/help/students/documents-and-id-cards

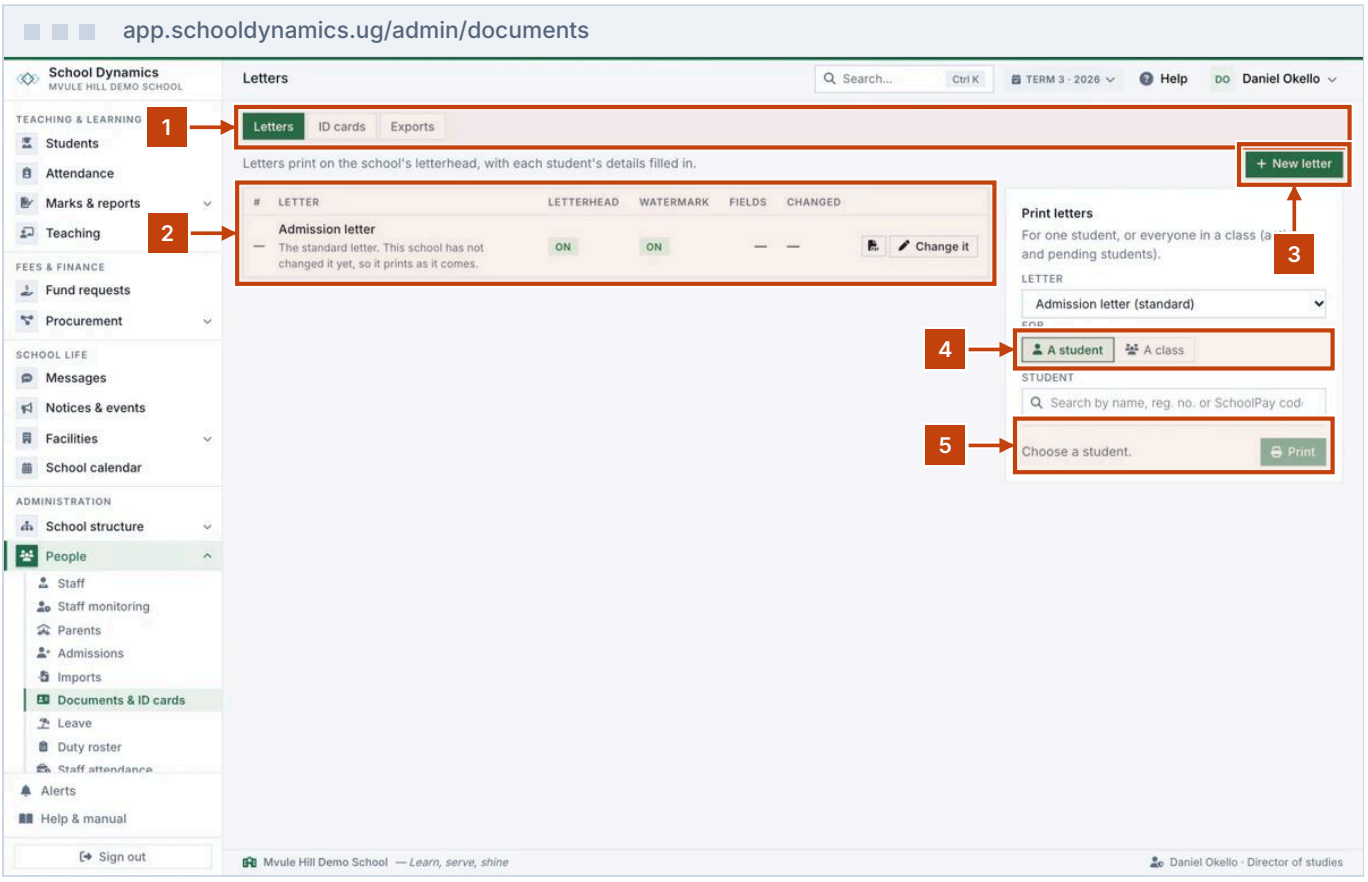
Documents & ID cards prints the papers students need: letters on the school's letterhead with each student's details filled in, and ID cards with photo, reg no., QR code and barcode. Its **Exports** tab downloads student lists and photos.

Open **Administration › People › Documents & ID cards**. Three tabs sit at the top: **Letters**, **ID cards** and **Exports**.

Before you start

- Anyone who may see students can print letters and ID cards.
- Changing letters, making ID card batches and using **Exports** is for the school administrator, the head teacher, the deputy, the director of studies and the secretary.
- The letterhead uses the school's name, logo, address and contacts from the School profile.

Letters



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1 Letters, ID cards and exports.

2 The school's letters. Click a letter to change it.

3 Write a new letter.

4 Print for one student or a whole class.

5 The number of letters, and the print button.

The tabs 1 switch between **Letters**, **ID cards** and **Exports**. The list 2 shows the school's letters, with whether each prints the letterhead and a watermark, and how many student fields it uses. The PDF icon on a row prints the letter with sample details, to check it.

Until the school changes it, the **Admission letter** is the standard one, which prints as it comes. Press **Change it** to make it the school's own.

Print letters

1. In **Print letters**, choose the **Letter**.
2. Choose **A student** or **A class** 4.
3. Search for the student by name, reg no. or SchoolPay code, or choose the class and, if you want, one stream.
4. Press **Print letter** (or **Print ... letters**) 5. The letters open as a PDF in a new tab, one a page.

A class prints its active and pending students. More than 250 students at once is refused: print one stream at a time.

A student's admission letter can also be printed from the row menu on the students list and from the student's page.

Write or change a letter

1. Press **New letter** 3, type its **Name** (for example *Suspension letter*) and choose to **Start from** a blank letter or a copy of another. Press **Add and write it**. To change an existing letter, click its name.
2. Choose whether to **Print the school's letterhead** (turn it off to print on headed paper) and to show a **Faint school logo behind the text**.
3. Write the **Text**. The toolbar has bold, headings, lists and undo.
4. Put student details in with **Insert a field...**. Fields are written in square brackets, like `[STUDENT_NAME]`, and are filled in for each student. `[REQUIREMENTS_TABLE]` becomes the term's fees.
5. Check the preview on the right. It uses made-up details; pick a real student under **Preview with** to see their own letter.
6. Press **Save letter**. **Open as PDF** shows the saved letter.

If you type something in square brackets that is not a field, a yellow note says it will print as typed. Choose fields from **Insert a field...** instead.

The bin on a row deletes a letter. Letters already printed are not affected. The admission letter cannot be deleted.

ID cards

The **ID cards** tab lists the batches of cards made, newest first: who they are for, the design and how many cards.

Make a batch

1. Press **New ID cards**.
2. Choose **Who gets a card**: **Students of classes** (every active student in them), **Chosen people** (students or staff you pick) or **All staff**.
3. Pick the classes (or **All classes**), or add the students and staff one by one.
4. Choose the **Design**: Template 1 (Classic), 2 (Guardian strip), 3 (Badge) or 4 (Portrait).
5. Press **Make the cards**. The batch opens.

Only active students and staff get a card.

Print a batch

The batch shows its first cards front and back, at actual size, with how many cards there are, how many have a photo and how long they are valid.

- Choose the layout: **Front and back side by side** (5 people a page; cut out both sides) or **Double-sided** (10 people a sheet; print both sides and flip on the long edge).
- When some people have no photo, the batch lists them under **Without a photo**, and their card shows their initials. Tick **Only people with a photo** to leave them out for now.
- Press **Print ... cards**. The cards open as a PDF.

> TIP
>
> Print at actual size (100%), not "fit to page". Each card is 85.6 × 54 mm, with cut marks.

The number on each card, in its QR code and its barcode, is the person's reg no.. The roll-call scan box finds a student by it; see Taking a roll-call.

A batch of more than 400 cards is too many to print at once: make one batch per class. **Download photos (ZIP)** gives the batch's photos, named the way you choose. **Change** and **Delete** change or remove the batch; cards already printed are not affected.

Exports

The **Exports** tab downloads lists and photos.

- **Student list**: choose the classes (or **Whole school**), the **Students** (**Active**, **Active and pending**, or **Everyone, including those who left**), **Excel** or **CSV**, and the columns (**All** or **The usual**). The count updates as you choose. Press **Download**.
- **Photos**: choose the classes and how to **Name each photo by** (reg no., SchoolPay code or name), then **Download ZIP**. A list of everyone is inside, and the line above the button says how many have a photo. Named by reg no., the photos can be edited and uploaded back in one go; see Photos.
- **Staff list** and staff photos, for those who may see staff.

Photo ZIPs made in the old system are listed at the bottom while their files are still on the server.

> ⚠ **CAREFUL**
>
> These files hold children's details and their guardians' phone numbers. Keep them safe and delete them when you are done. See Data protection.

QUESTIONS

Can I change the words of the admission letter?
Yes. On **Letters**, press **Change it** on the standard admission letter (or click its name once you have changed it), edit the text and press **Save letter**. The admission letter keeps its name and cannot be deleted.

Why does an ID card show initials instead of a photo?
The person has no photo. The batch lists everyone without one; upload their photos and print again. See Photos.

My printed ID cards are too small.
Print at actual size (100%), not "fit to page". The cards are 85.6 × 54 mm, the size of a bank card.

Until when are the cards valid?
Until the date set as **Student ID cards expire** in the School profile. With no date, 31 December of the current year.

Discipline and conduct records

Record a student's good or bad conduct, what was done about it and everyone's comments, and see a student's conduct over the terms.

For: Teacher, Head teacher, Director of studies · app.schooldynamics.ug/help/students/discipline

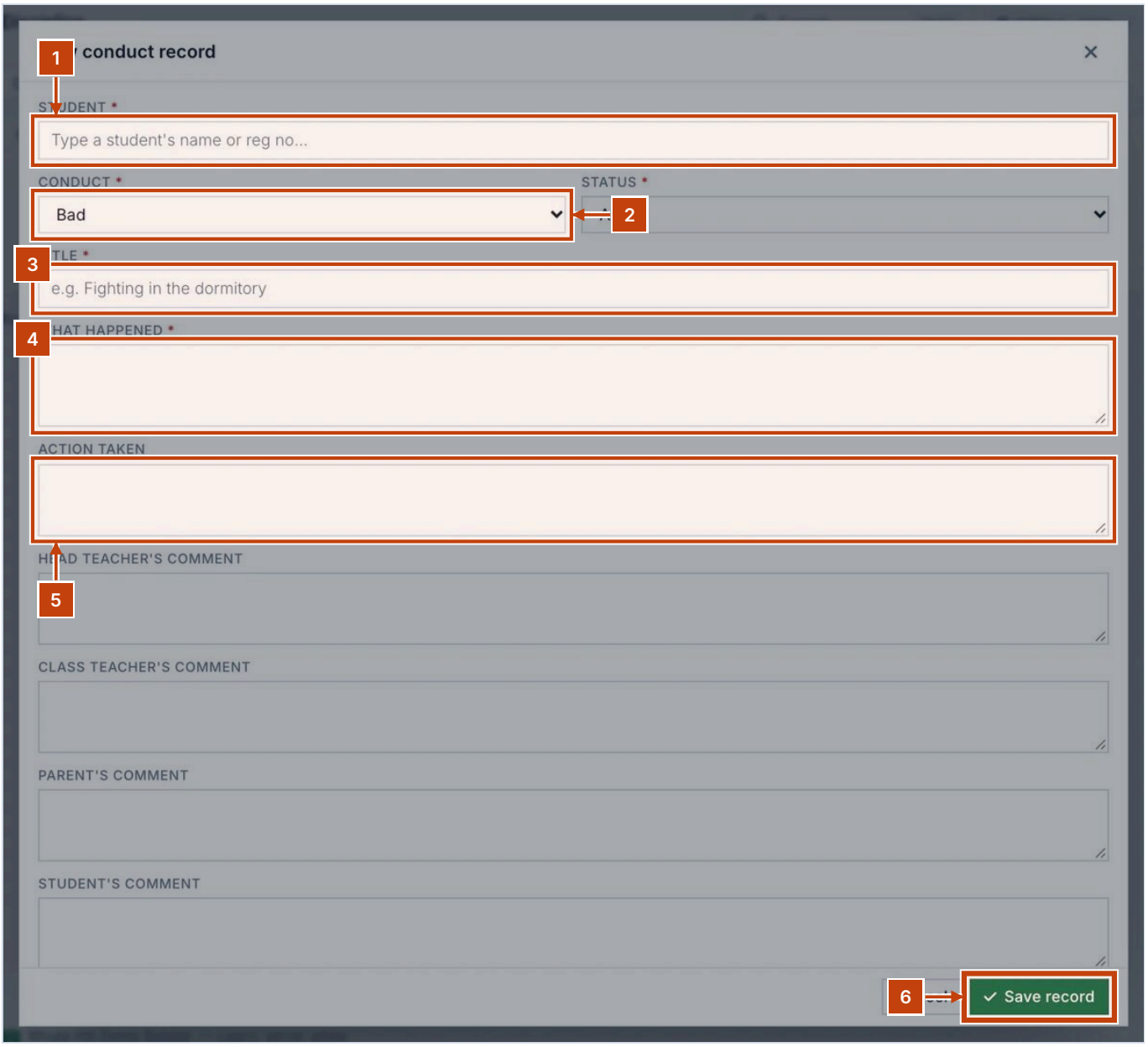
A conduct record notes something a student did, good or bad, what the school did about it, and the comments of the head teacher, the class teacher, the parent and the student. Records are kept term by term, so you can see a student's conduct over the years.

Open **School life › Facilities › Discipline**.

Before you start

- Anyone who may see students can read the records.
- Teachers, the director of studies, the head teacher, the deputy and the school administrator can record, edit and comment.
- The school needs an active term: every record is filed under it.

Record conduct



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1. Type the student's name or reg no., then pick them.
2. Good or bad conduct.
3. A short title, such as Fighting in the dormitory.
4. What happened.
5. What was done, and the comments, when you know them.
6. Save the record.

1. Press **New record**.
2. Type the student's name or reg no. 1 and pick the student from the list. Active and pending students are listed.
3. Choose the **Conduct** 2: **Bad** or **Good**. Leave the **Status** as **Active**.
4. Type a **Title** 3 and **What happened** 4. Both are required.
5. Add the **Action taken** 5 and the comments you have: **Head teacher's comment**, **Class teacher's comment**, **Parent's comment**, **Student's comment**. You can add them later.
6. Press **Save record** 6.

The record is saved with your name, the date and the active term.

Find and read records

The list shows every record, newest first, with the date and term, the student and their class, **Good** or **Bad**, the title, the action taken, who recorded it and the status. Search by the student's name, reg no. or the title, and filter by **Good and bad**, **Any status** and the term.

Click a student's name to see only their records. The page then shows how many good and bad records they have, and **New record** is for that student.

The eye on a row opens the whole record: what happened, every comment, and a photo if one was added. Opening a record is noted in the student's history, which the head teacher can see on the student's page.

Add comments later

Press **Edit or comment** on an open record, or the pencil on its row. Add the comments as they come in and the action taken, and press **Save changes**. A record stays **Active** unless you set its **Status** to **Inactive**.

Delete, on an open record, removes it for good. Only leaders see it.

> GOOD TO KNOW
>
> A parent who asks for a copy of their child's records receives the conduct records too. See Record requests.

QUESTIONS

Can a teacher delete a record?
No. Teachers can record, edit and comment. Only the head teacher, the deputy and the school administrator can delete a record.

Can I change the student on a record?

No. The student is fixed once the record is saved. If it is the wrong student, a leader deletes the record and you record it again.

Why can I not save a new record?
Every record belongs to a term, so the school needs an active term. If there is none, the dialog says *Set the school's active term first*.

Answer a parent's request for their child's records

Parents can ask for a copy of everything the school holds about their child. Prepare the copy, or decline with a reason, within 30 days.

For: Secretary, Head teacher, School administrator · app.schooldynamics.ug/help/students/record-requests

The law gives a parent the right to a copy of what the school holds about their child, and gives the school thirty days to answer. A parent asks from their own signed-in page. The request then waits on **Administration › People › Record requests** until someone prepares the copy or declines.

Before you start

- Record requests are for the head teacher, the deputy, the school administrator and the secretary.

The list

The figures at the top count the requests **Waiting** and those **Past the 30 days**. Waiting requests come first, the one due soonest at the top. Choose **Waiting**, **Ready**, **Declined** or **All**, or search by the child's name.

Each row shows the child, the parent who asked, the day they asked, the day to **Answer by** and the status.

Prepare the copy

1. Click the child's name. The request opens, with anything the parent wrote.
2. Press **Prepare the copy and tell the parent**.

The copy is made at once: a PDF and spreadsheet files holding the child's details, classes, fees account, report cards and marks, attendance, discipline, sick-bay visits, requirements, pocket money and messages. Other people's details (the other parent, emergency contacts, staff) are left out.

The parent is told by a message and downloads the copy from their own page for 14 days. **Download the copy** lets you see exactly what they got, and the request shows how many times it was downloaded.

Decline a request

1. Open the request and press **Decline**.
2. Write **Why (the parent reads this)**.
3. Press **Decline the request**.

The parent is told, with your reason. Only a waiting request can be declined.

> **GOOD TO KNOW**
>
> Asking, preparing, declining and every download are written in the school's audit log. A parent can have one waiting request per child at a time.

QUESTIONS

How long do we have to answer?
Thirty days from the day the parent asked. The list shows the day to answer by, and counts the requests past it.

Does a parent who owes fees still get the report cards in the copy?
Yes. The copy holds the report cards and marks whatever the fees balance.

The parent says the download no longer works.
A copy can be downloaded for 14 days, then the file is removed. Open the request and press **Prepare the copy and tell the parent** again.

Students who leave

Mark a student who left or finished school as not active. Their records and balance stay, they are no longer billed, and they can come back.

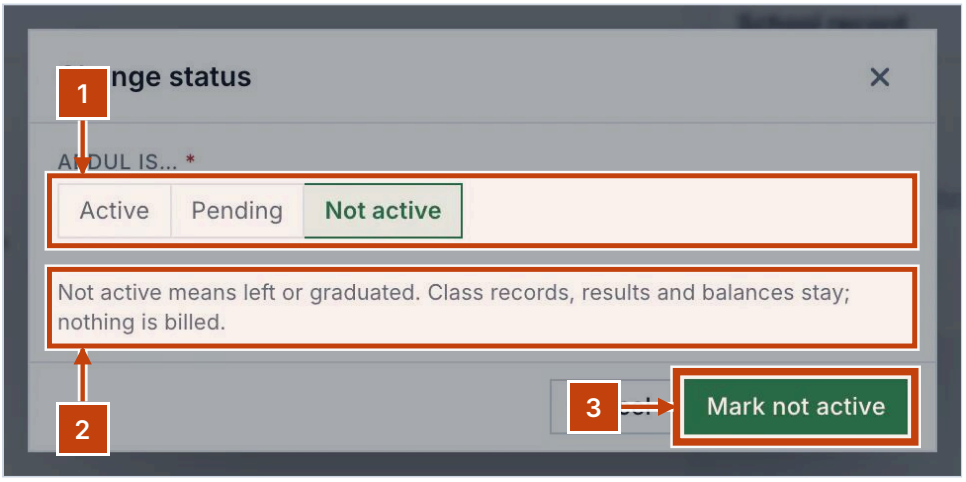
For: Secretary, School administrator, Director of studies, Bursar · app.schooldynamics.ug/help/students/students-who-leave

When a student leaves the school, transfers or finishes their last class, mark them **Not active**. Nothing about them is deleted: they move off the lists of students in school.

Before you start

- Changing a student's status is for the school administrator, the director of studies and the secretary.

Mark one student as not active



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1 Choose Not active.

2 What it means: records and balances stay, nothing is billed.

3 Mark the student not active.

1. Open the student's page and press **Change status**. (The student's quick view and the row menu on the students list have **Change status** too.)
2. Choose **Not active** 1. The line below says what that means 2.
3. Press **Mark not active** 3.

Mark many students as not active

1. On **Teaching & learning › Students**, filter the list (for example to the class that finished school) and tick the students, or tick the whole page. **Select all … matching** takes every page.
2. Press **Status** in the bar that appears.
3. Choose **Not active**. The dialog says how many will change, and who is left as they are because they already are not active.
4. Press **Mark … students not active**.

What changes, and what stays

A student marked not active:

- moves to the **Not active** tab of the students list, and off the **Active** one;
- keeps their class history, report cards and marks, and stays on the roll-calls already taken. Attendance figures, on their page and on the dashboard, count active students only;
- keeps their fees account and balance: what they owe stays owed. Fees already billed stay; to change them, see Fixing mistakes;
- is no longer billed: **Bill now** and new term's fees are for active students only;
- is left out of new roll-calls, attendance figures, ID card batches and promotions by results;
- is left out of letters printed for a class (they print for active and pending students), though you can still print a letter for the student by name;
- stays linked to their parent account.

> ⚠ CAREFUL
>
> A payment recorded in the active term on the account of a student who is not active (by hand or through SchoolPay) makes the student active again, as in the old system, if they still have a class. They are then billed this term's fees for that class. If a student who left pays an old debt, check their status and their account afterwards.

The **Student list** export can still include them: choose **Everyone, including those who left**. See Exports.

When a student comes back

Find them on the **Not active** tab, press **Change status**, choose **Active** and press **Make active**.

To become active, a student needs a class of the active academic year. If their class is from an earlier year, the dialog says the student cannot be made active and why: press **Edit details**, choose their class for this year, then make them active.

When they become active again, they are billed this term's fees for their class that are not billed to them yet, and get a reg no. if they have none.

QUESTIONS

Can I delete a student who left?
No. Students are never deleted. A student marked **Not active** stays on the **Not active** tab with their class history, results and balance.

The student left owing fees. What happens to the balance?
It stays on their account. The bursar still sees it and can record payments. See Student accounts.

A student who left is coming back. Do I admit them again?
No. Find them on the **Not active** tab and make them active. Put them in a class of the active year first if their old class is from an earlier year.

A whole class finished school. Do I mark them one by one?
No. Filter the list to the class, tick the whole page (or **Select all … matching**), press **Status** and choose **Not active**.

04

Attendance

Take roll-calls, follow who is absent, and keep staff attendance.

Teachers take a roll-call in seconds on a phone or a laptop; leaders see who is absent today and who misses school often. Night roll-calls for boarders are in the boarding chapter.

Take a roll-call	4 min
The attendance dashboard and reports	3 min
Staff attendance	2 min

Take a roll-call

Start a roll-call for a class, a stream or the whole school, mark each student present, late or absent (or scan their ID cards), close it, and text the parents of absent students.

For: Teacher, Director of studies, Head teacher · app.schooldynamics.ug/help/attendance/taking-a-roll-call

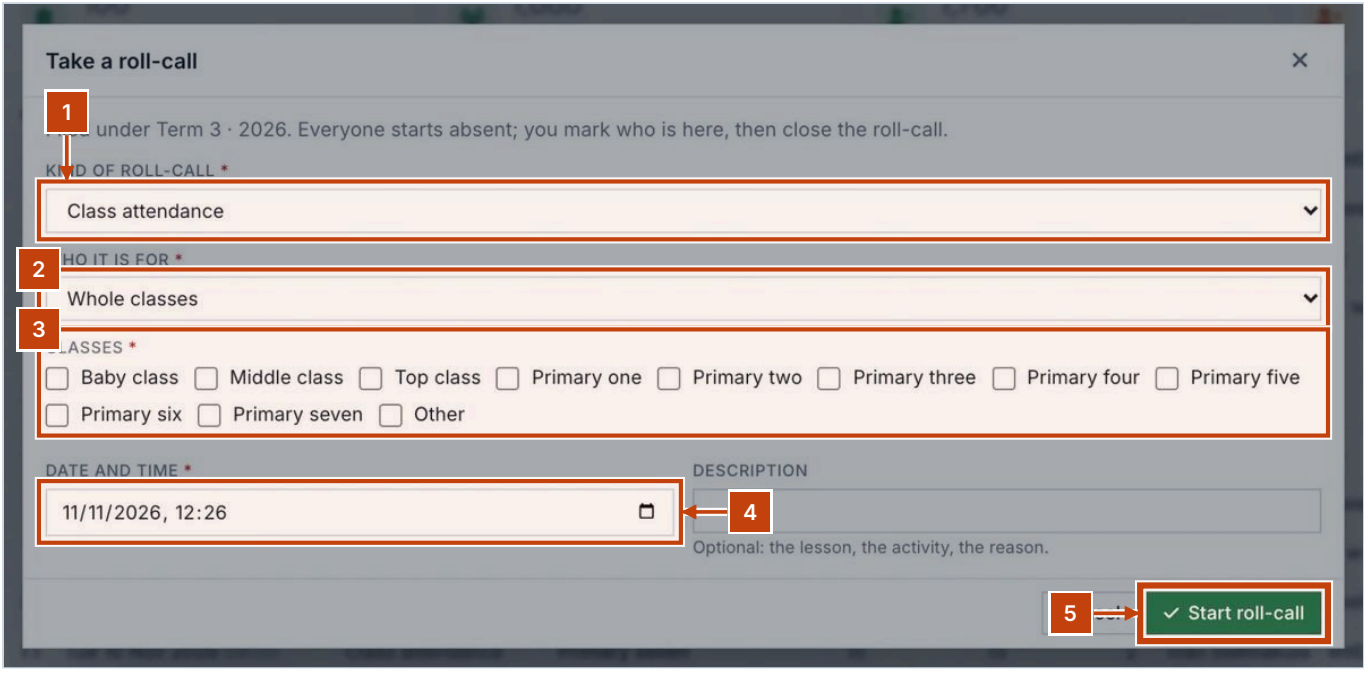
A roll-call records who is here: a class in the morning, a stream for a lesson, the students taking lunch, or everyone reporting at the start of term. You start it, mark each student, and close it. Closed roll-calls feed the attendance dashboard, each student's **Attendance** tab and the reports.

Open **Teaching & learning › Attendance**. The first tab, **Roll-calls**, lists every roll-call taken.

Before you start

- Teachers, wardens, the director of studies, the head teacher, the deputy and the school administrator can take roll-calls. Others who may see students can read them.
- The school needs an active term: every roll-call is filed under it. Without one, the dialog says *There is no active term. Make a term active first.*
- Only active students are expected on a roll-call.

Start a roll-call



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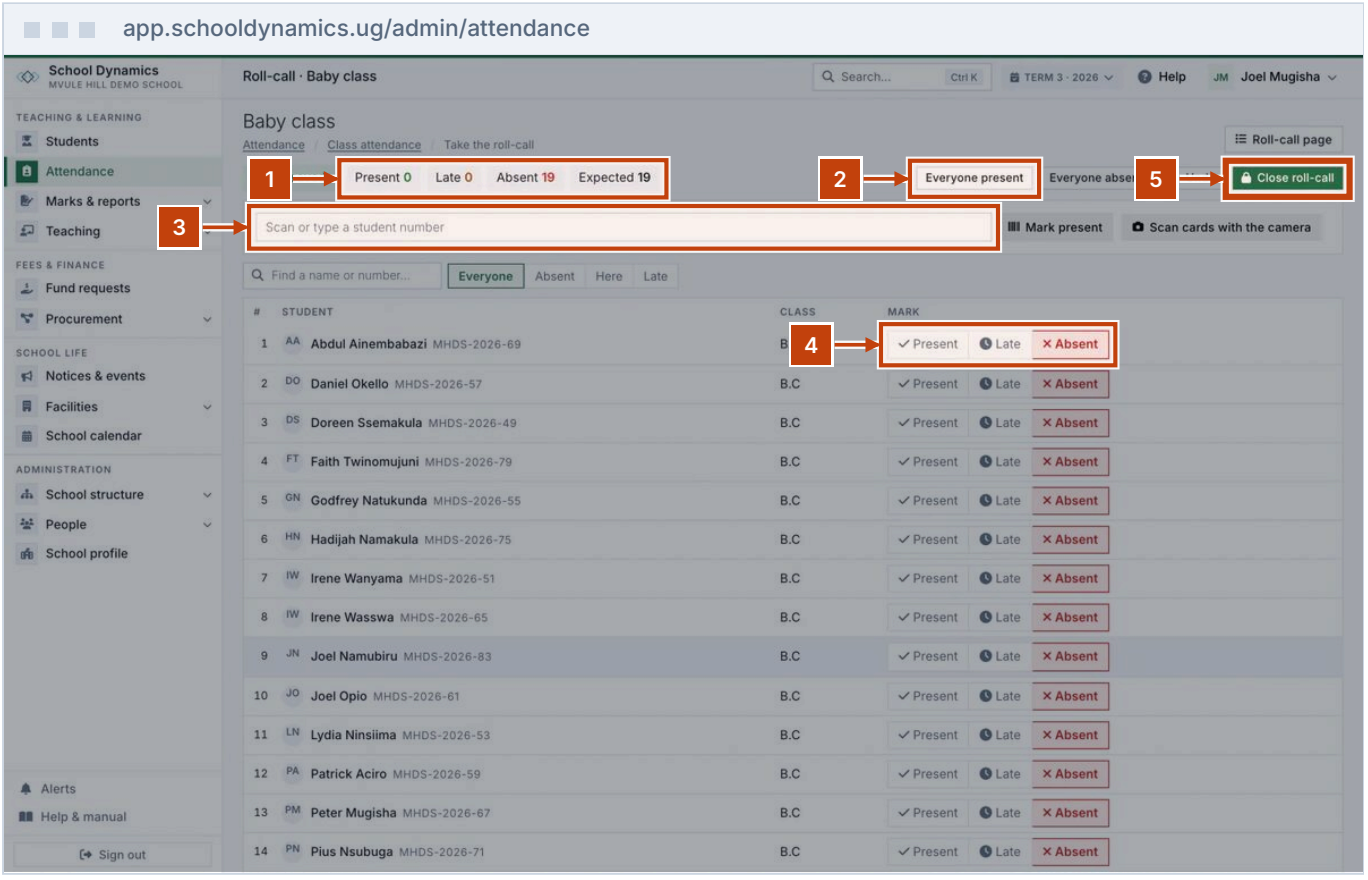
1. The kind of roll-call: class attendance, meals, reporting at school …
2. Who it is for: whole classes, one stream, a service or the whole school.
3. Tick the classes.
4. When: now, unless you change it.
5. Start: everyone begins absent.

1. Press **Take a roll-call**.
2. Choose the **Kind of roll-call** 1 : **Class attendance**, **Reporting at school**, **Leaving school**, **Meals**, **Activity participation**, **Service attendance** or **Theology class attendance**.
3. Choose **Who it is for** 2 : **Whole classes**, **One stream**, **Subscribers of a service** (the students taking that service this term) or **All active students**. Schools with theology classes can also choose theology classes or one theology stream.
4. Tick the classes 3 , or choose the stream or service.
5. Check the **Date and time** 4 , and add a **Description** if it helps (the lesson, the activity).
6. Press **Start roll-call** 5 .

The message says how many students are expected, and the marking page opens. Everyone starts absent.

Mark the students



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1. Present (late included), late, absent and expected, as you mark.
2. Mark everyone present, then mark the few who are not.
3. Scan an ID card or type a student number.
4. Present, late or absent, one tap per student.
5. Close it when you are done. It cannot be changed afterwards.

The totals at the top 1 change as you mark.

- In a full class, press **Everyone present** 2, then mark the few who are not. **Everyone absent** does the opposite.
- On each row 4, press **Present**, **Late** or **Absent**.
- To scan ID cards, click in the box 3 and scan the card with a barcode scanner, or type the student's reg no. and press **Mark present**. **Scan cards with the camera** uses the device's camera instead. A student who was not expected is added and marked present.
- Find a student with the search box, and show **Everyone**, **Absent**, **Here** or **Late**.
- **Undo** (or Ctrl + Z) takes back the last change.

On a laptop, the keys are quicker: on a row, P present, L late, A absent, Space switches present and absent, and Up, Down or Enter move between rows.

Each mark saves by itself. While the internet is down, marks wait on the device and are sent when it returns; the line at the top says what is not sent yet.

Close the roll-call

Press **Close roll-call** 5 and confirm. The message says how many were present and absent.

> ⚠ CAREFUL
>
> A closed roll-call cannot be changed. **Close roll-call** cannot be pressed until every mark is saved and you are online.

Until it is closed, a roll-call counts everyone not marked as absent, and it is left out of the dashboard and the reports.

The list of roll-calls

Each row shows the date, the kind, who it was for, the numbers expected, present and absent, who took it (on the web or the app) and whether it is **Open** or **Closed**. Filter by kind, class, open or closed, and dates; the figures above the list add up what you see.

Click a roll-call for its quick view: the figures and the absent students. **Mark and close** continues an open one; **Open the roll-call** shows a closed one in full.

The roll-call's own page shows every student with their mark, and has **Export** (a spreadsheet of the students and their marks) and **Delete**. On the list, **Export roll-calls** and **Export student records** download what your filters show.

Text the parents of absent students

After a roll-call is closed, those who send messages (the head teacher, the deputy, the director of studies, the bursar, the secretary and the school administrator) can tell parents.

1. Open the closed roll-call and press **Text parents of absent** (or **Text parents** in its quick view).
2. Read or change the **Message**. Keep `[STUDENT_NAME]`: it becomes each child's name.
3. Check who it goes to, the cost and what is in the SMS wallet. Students with no phone on record, and parents who asked not to get SMS, are listed and left out.
4. Press **Send … messages**.

Each parent is texted once per roll-call: a parent already told is not texted again. It is not offered for **Leaving school** roll-calls, where absent means still at school.

The message is the school's **Absence today** message when the school has written one. If that message is switched off, or the school's messaging is off, or the wallet is short, the dialog says so and nothing is sent. See Automatic messages and How SMS works.

GOOD TO KNOW

Boarders' night roll-calls are taken by dormitory. See Night roll-call.

QUESTIONS

The internet went off while I was marking. Are my marks lost?
No. Each mark waits on your device and is sent when the connection returns. **Close roll-call** waits until every mark is saved.

I closed a roll-call with a mistake. Can I change it?
No. A closed roll-call cannot be changed. Check the marks before you close.

Does a late student count as absent?
No. Late students count as present on every report, and the roll-call also notes that they were late.

Can I take the roll-call on the phone app?
Yes. Roll-calls taken on the app appear on the same list, marked *app* beside who took them.

Who can delete a roll-call?
An open roll-call can be deleted by whoever started it or by a leader. A closed one only by the head teacher, the deputy or the school administrator.

The attendance dashboard and reports

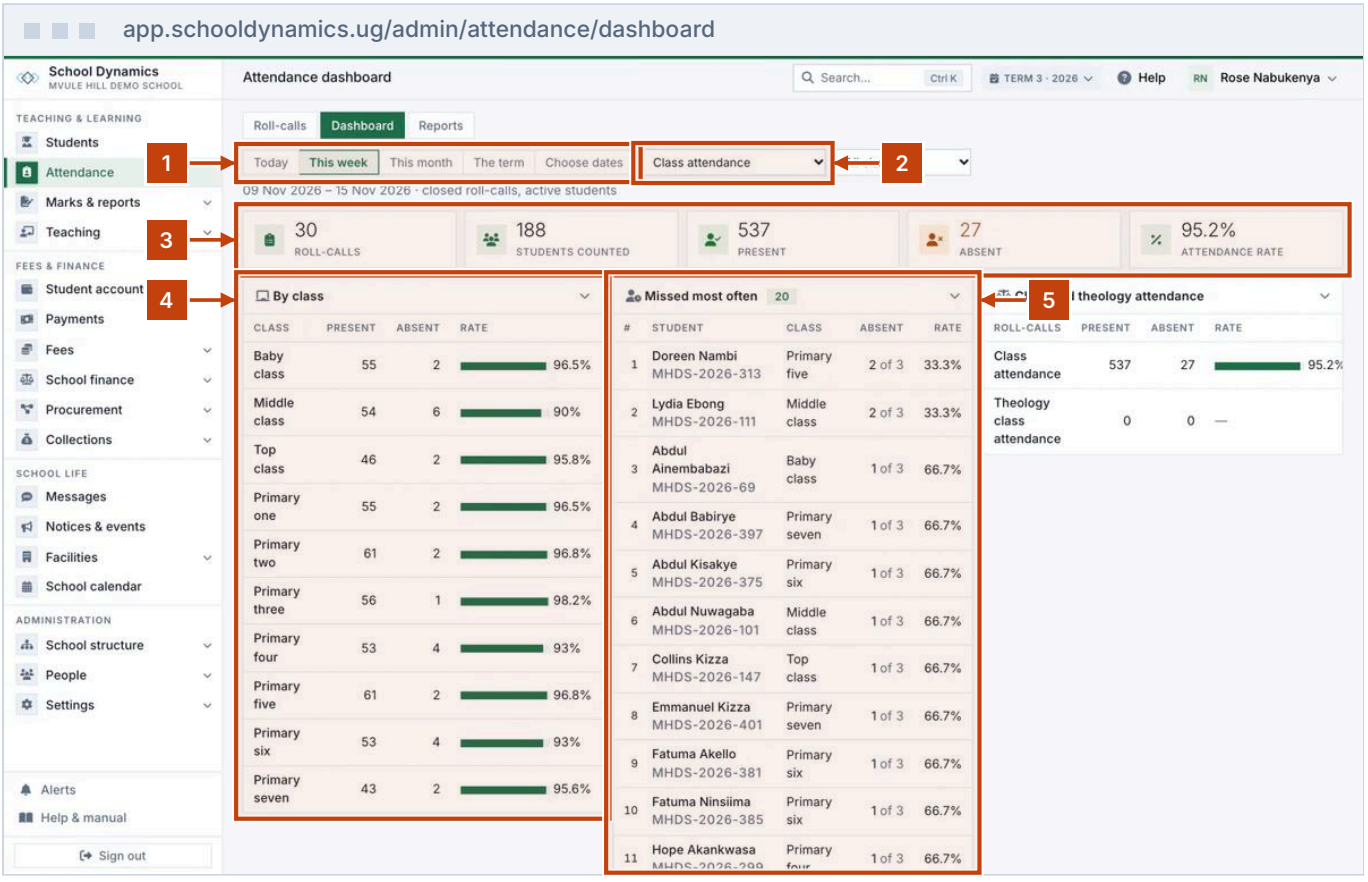
See how attendance is going today, this week, this month or this term - by class, stream, day, boys and girls - who misses school most, and make a printable attendance report.

For: Head teacher, Director of studies, Teacher · app.schooldynamics.ug/help/attendance/attendance-dashboard

The attendance dashboard turns the closed roll-calls into figures: how many were present, which classes are doing well, and which students miss school most. Attendance reports put a period's figures on paper, with the teachers on duty.

Open **Teaching & learning › Attendance** and choose the **Dashboard** tab. **Reports** is the tab beside it.

Reading the dashboard



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1. Today, this week, this month, the term, or dates you choose.
2. Which roll-calls count: class attendance at first.
3. Roll-calls, students, present, absent and the attendance rate.
4. Each class's present, absent and rate.
5. The students absent most often: follow them up.

Choose the period 1: **Today**, **This week** (the default), **This month**, **The term** or **Choose dates**. **The term** uses the term chosen in the top bar, up to today; if that term has no start date, the dashboard shows this week.

Choose the kind of roll-call 2 (it opens on **Class attendance**) and, if you want, one class. The line beside them gives the dates and reminds you that only closed roll-calls and active students count.

The figures 3 give the number of roll-calls, students counted, present, absent and the attendance rate. A rate under 80% shows in red.

Below them:

Section	What it shows
By class 4	Present, absent and the rate of each class, with a bar.
Missed most often 5	The 20 students absent most often, with how many times out of how many roll-calls.
Class and theology attendance	Class attendance beside theology class attendance.
By theology class	Each theology class, at schools with theology classes.
By stream	Each stream of each class.
Present most often	The 20 students present most often.
Day by day	Each day of the period.
Boys and girls	Boys and girls separately.
By kind of roll-call	Class attendance, meals, reporting at school and the others.

Click a student's name to open their quick view; their **Attendance** tab shows the same figures for this term, the last 90 days or this year. Each section's header folds it away, and the page remembers it.

> TIP
>
> Open **Missed most often** every Monday for the week before. Call the parents of the students at the top, or text the parents of absent students straight after a roll-call.

> GOOD TO KNOW
>
> A roll-call counts on the day it was taken, even when a phone sent it later. Late students count as present.

Attendance reports

An attendance report is a period's figures, by class or stream, with the teachers on duty, kept so it can be printed and compared later.

1. On the **Reports** tab, press **New report**.
2. Choose the **First day** and **Last day** (this week, up to today, at first) and the **Kind of roll-call**.
3. Choose the **Scope**: **All classes**, **Chosen classes** or **Chosen streams**, and tick them.
4. Choose the **First teacher on duty** (you, at first), and if you want the **Second teacher on duty** and the **Head of the week**.
5. Add **Remarks**: what you saw, what you recommend.
6. Press **Create report**. The report opens.

The report shows the period, scope and teachers on duty, then a table of each class (or stream) with boys and girls present and absent, the totals and the rate. Below it are the ten students **Absent most often** and the ten **Present most often**.

- **Download PDF** gives the report on the school's letterhead.
- **Recalculate** counts everything again, for example after roll-calls of that week were closed late. It keeps the same scope.

The **Reports** list shows every report with its period, days, boys and girls present and the teachers on duty. The eye opens a quick view, the PDF icon downloads it, and the arrows recalculate it.

QUESTIONS

Why does a roll-call taken today not show on the dashboard?
Only closed roll-calls count. A roll-call still being taken would show everyone absent, so it is left out until it is closed.

Why does the dashboard show only class attendance?
It opens on **Class attendance**. Choose **All kinds**, or another kind, in the second box.

A teacher's phone sent yesterday's roll-call this morning. Which day does it count on?
The day it was taken, not the day it reached the school.

Who can make an attendance report?
Those who take roll-calls - teachers, wardens, the director of studies, the head teacher, the deputy and the school administrator. Anyone who may see students can read and download them.

Staff attendance

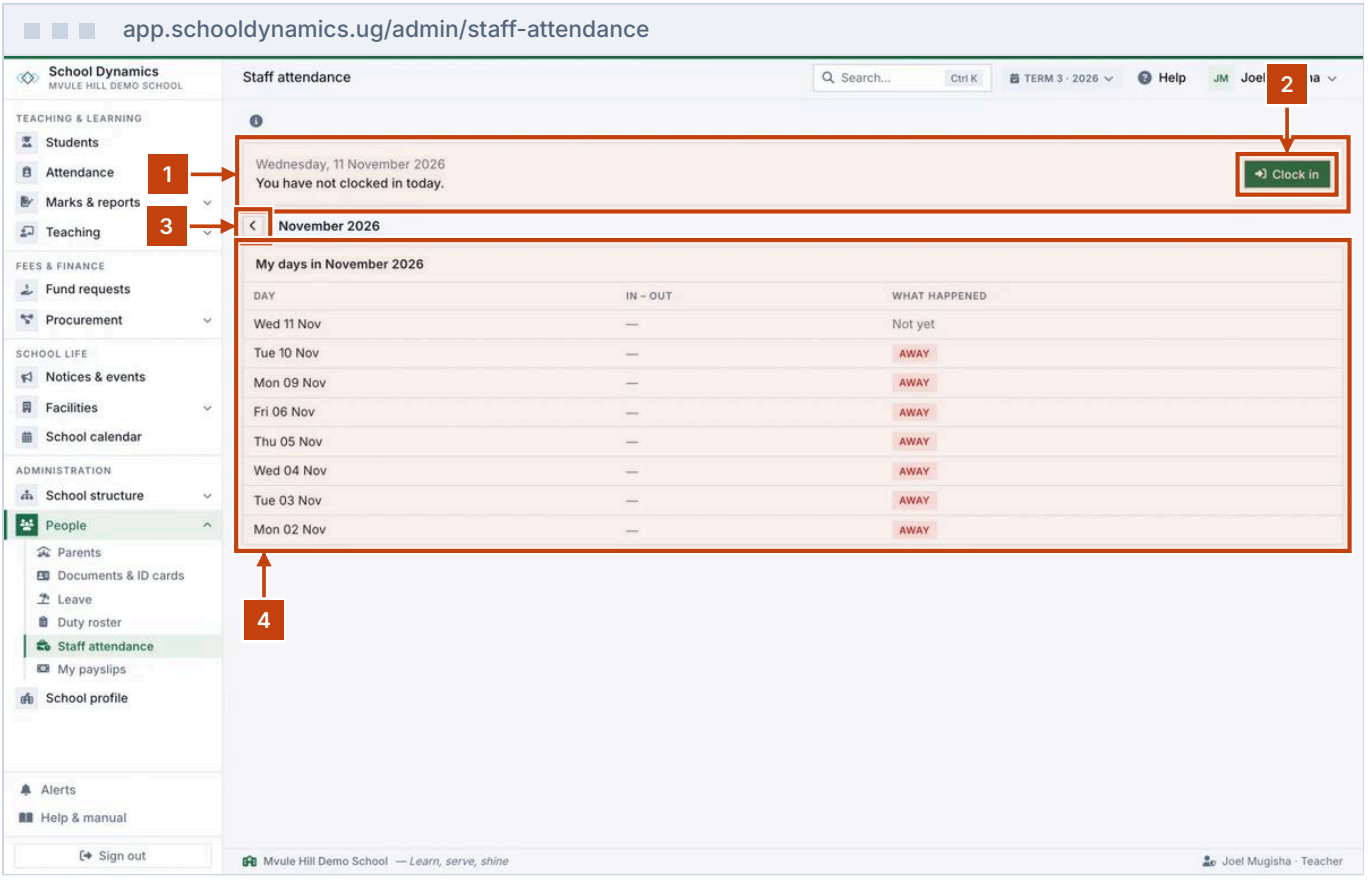
Every member of staff clocks in and out each day. Leaders see the month for everyone - present, late, on leave and away - and the office records a day someone forgot.

For: Everyone, Head teacher, School administrator, Secretary · app.schooldynamics.ug/help/attendance/staff-attendance

Staff attendance records whether staff came to school: each member of staff clocks in when they arrive and out when they leave. Leaders see the whole month for everyone, and the office puts right a day someone forgot.

Open **Administration › People › Staff attendance**. Every member of staff can open it.

Clock in and out



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1. Today: whether you have clocked in, and when.
2. Clock in when you arrive. The same place then says Clock out.
3. Look back at earlier months.
4. Your month, day by day: in, late, on leave or away.

1. When you arrive, open **Staff attendance** and press **Clock in** 2.
2. When you leave, open it again and press **Clock out**.

The top card 1 says whether you have clocked in today, and at what times. You clock in once a day.

Below, **My days in ...** 4 shows your month day by day: the times in and out, and **In**, **Late**, **On leave** or **Away**. Use the arrows 3 to look at earlier months.

> GOOD TO KNOW
>
> The working week is Monday to Friday and the day starts at 08:00, until the office changes them. Clocking in after the start time counts as **Late**. A working day with no clock-in and no approved leave counts as **Away**.

The month for everyone

The head teacher, the deputy, the director of studies, the bursar and the school administrator also see the month for all staff:

- the **Working days so far**, the share **Present** (of the days expected, leave left out), the **Late arrivals** and the **Days away**;
- a row for each person: days present out of working days, late, on leave and away. For those who may read staff monitoring, a **Lessons monitored** column shows each teacher's lessons done and skipped that month; see Staff monitoring.

Search a name, and click it (or the eye) to see that person's month day by day. **Spreadsheet** downloads the month.

For the office: record a day, set the working week

The secretary, the head teacher, the deputy and the school administrator can put days right.

To record a day someone forgot:

1. Press **Record a day** (or open the person and press **Record a day** there).
2. Choose **Who** and the **Day**. The day cannot be in the future.
3. Add the **Time in** and **Time out** if you know them. A time out needs a time in.
4. Write **Why the office is recording it**, for example *Forgot to clock in; signed the book*. It is required.
5. Press **Record the day**.

In a person's month, the pencil on a day corrects it, and the bin removes it (the day then counts as away, unless there is leave). Every change the office makes is recorded with its reason.

To set the working week, press **Working week**, tick **Days the school works**, set **The day starts at**, and press **Save working week**. Leave days are counted on these days too. Uganda's fixed public holidays, Good Friday and Easter Monday are left out on their own; Eid days change each year, so adjust a leave request that spans one.

QUESTIONS

I forgot to clock in. What do I do?
Ask the office (the secretary, the head teacher, the deputy or the school administrator) to record the day for you. They give the reason, and the day shows as *Recorded by the office*.

Does clocking in record where I am?
No. No location is taken.

I was on leave. Will those days count as away?
No. Days of approved leave count as **On leave**. See Leave.

Can I clock in for yesterday?
No. You clock in for today only. The office can record an earlier day.

05

Marks and report cards

Set up the term's reports, enter marks, make, check, release and print report cards.

A term's report cards, start to finish. Begin with **The term at a glance**: one page that says what to do next. Then the settings, marks, making the cards, comments, release and printing, in the order a term needs them, and what parents see. Teachers need only **Enter marks** and **Write report card comments**; the director of studies and head teacher read the whole chapter.

The last lessons cover the other kinds of results: competency reports for the new lower secondary curriculum, progressive tests, results analysis, the UNEB files and the old results kept from 2022–23.

The term at a glance	5 min
Set a term's report settings	5 min
Enter marks	4 min
Theology marks and report cards	3 min
Make the report cards	5 min
Write report card comments	5 min
Check, approve and release report cards	5 min
Print report cards	4 min
Choose how report cards look	2 min
What parents see, and when	4 min
Competency reports (new lower secondary curriculum)	5 min
Progressive tests	4 min
Analyse results	3 min
UNEB candidate lists and results files	2 min
Old results (2022–23)	3 min

The term at a glance

One page for a term's report cards, start to finish. It shows seven steps, how far each one is, and the one thing to do next.

For: Director of studies, Head teacher · app.schooldynamics.ug/help/reports/the-term-at-a-glance

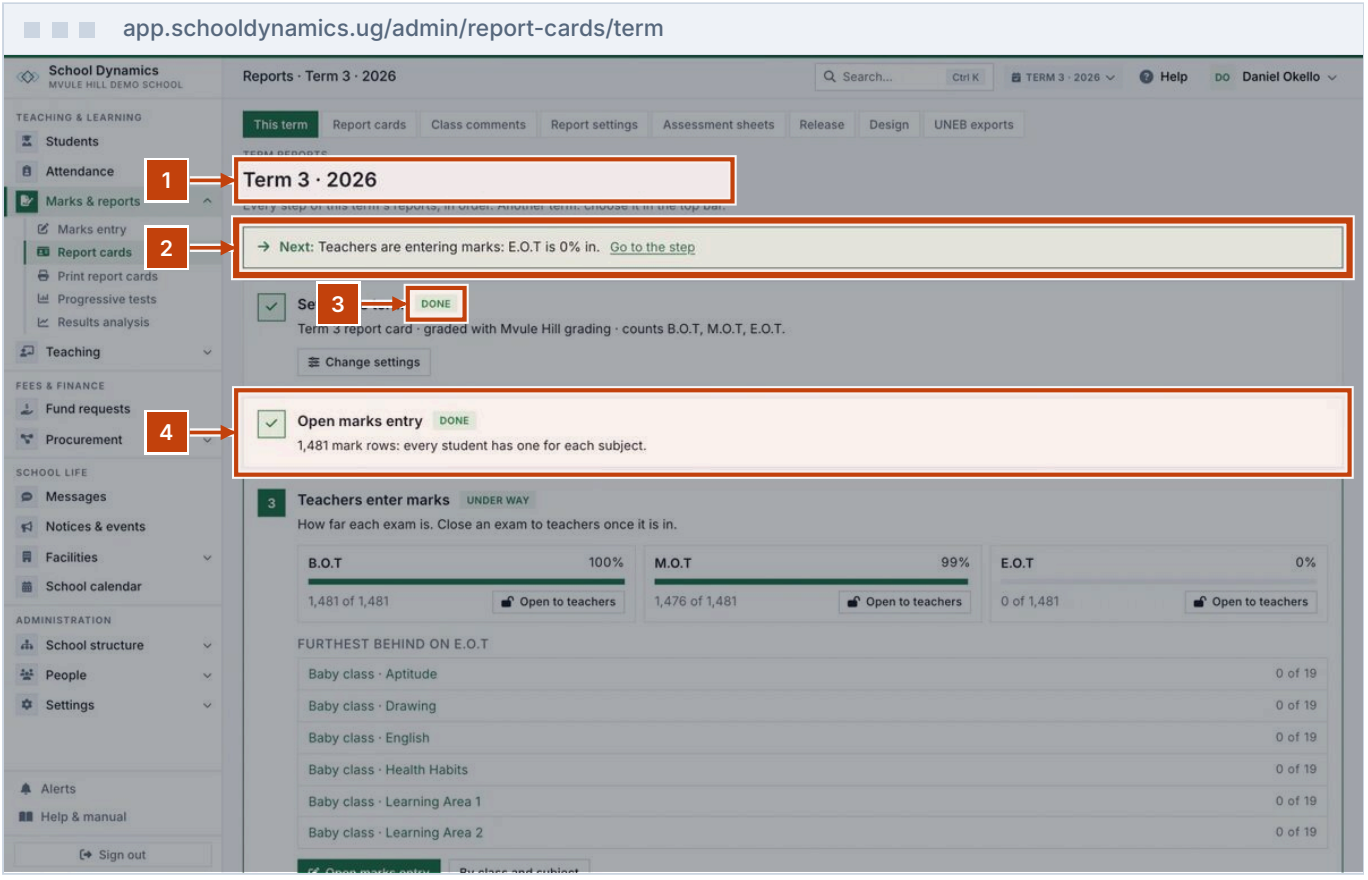
A term's report cards go through the same seven steps every term: set the term up, give every student a row for marks, let teachers enter them, make the cards, add comments, release them to parents, and print. **The term at a glance** puts all seven on one page. Each step says how far it is and has its one button. A line at the top says what to do next.

Open it from **Marks & reports › Report cards**. It is the first tab, **This term**.

Before you start

- The page works on the term chosen in the top bar, which is the school's **active** term unless you chose another. If the page says *This school has no active term*, set one under › **Academic years**.
- The director of studies, head teacher, deputy and school administrator can use the buttons. Teachers can see the page, but cannot change anything on it; a class teacher can print their own class's cards from step 7.

Reading the page



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1 The term you are working on. To work on another term, choose it in the top bar.

2 **Next:** the one thing to do now, with a link to its step.

3 Each step's state: Done, Under way, To do or Needs attention.

4 A step that is done says what it did.

The term's name is at the top 1. The page always shows the term chosen in the top bar. Choose another term there to look back at an old one.

The **Next:** line 2 is the one thing to do now. Its link scrolls down to that step. While a long job runs (making cards for every class), the line becomes a progress bar instead, and you can leave the page: the job carries on.

Each step carries its state 3:

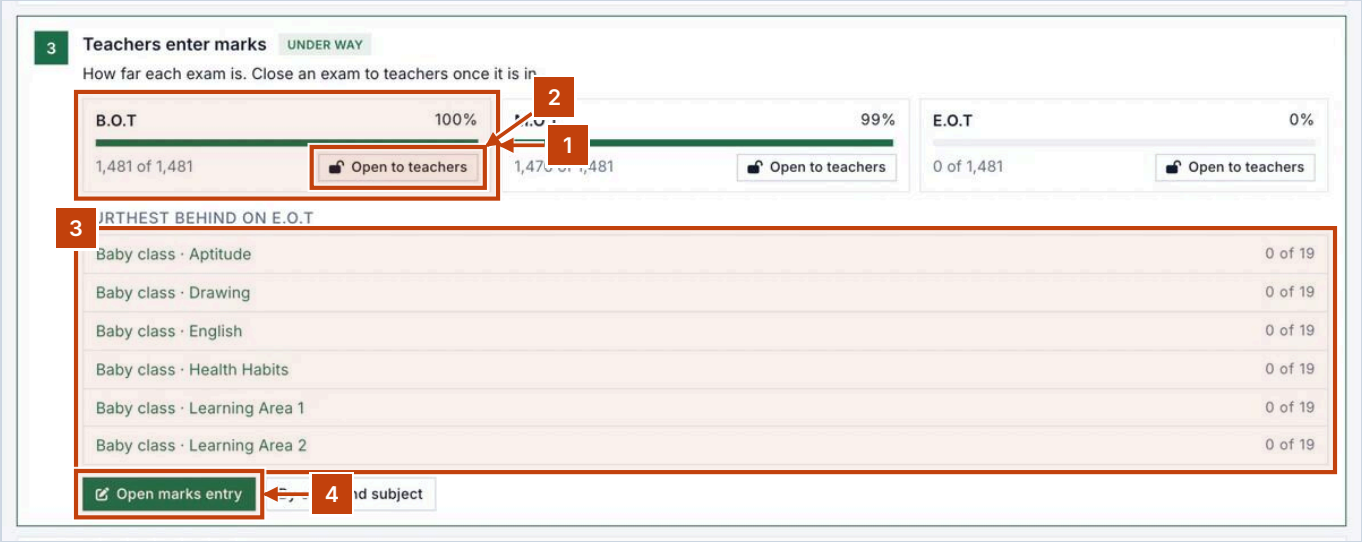
State	Means
Done	Nothing left to do here.
Under way	Started: teachers are still entering marks.
To do	Ready for you now.
Needs attention	Something changed after the step was done (new students, or marks changed after the cards were made). Do it again.
After the steps above	Waiting for an earlier step.

A step that is done tells you what it did 4, for example *1,214 mark rows: every student has one for each subject*.

The seven steps

1. **Set up the term.** Type the report title (*End of Term 2 report*) and choose the grading scale, then press **Set up** (the button names the term, for example **Set up Term 2 · 2026**). Everything else is copied from last term: which exams count, who may enter them, how positions are worked out and what the cards show. The head teacher's message and the note at the bottom are not copied, because they belong to one term. Write them under **Change settings**.
2. **Open marks entry.** Press **Create mark rows**. Every active student gets a mark row for each of their subjects, so teachers can type marks. If students or subjects are added later, the step says *Needs attention* and offers **Create the missing rows**. Marks already entered are never touched.
3. **Teachers enter marks.** Teachers enter marks under **Marks entry**. Follow their progress here (see below). When an exam is complete, close it to teachers so no one changes it by mistake.
4. **Make the report cards.** Press **Make the report cards**. This works out every subject's grade, then each student's totals, aggregates, division and position. Tick *Also write comments from the comment bank* to fill empty comments at the same time. If marks change afterwards, the step says *Needs attention*: press **Make them again**.
5. **Comments.** The step counts the cards that have no class teacher's or head teacher's comment. Press **Write the missing ones from the comment bank**, or **Write or change comments** to write them yourself.
6. **Check, approve and release.** Each class's cards are checked, then approved, then released. Parents see a class's cards only after it is released. The step counts how many classes are at each stage. Its button opens the release page.
7. **Print.** Print a class at a time (see below).

Following marks entry



The demo school · invented names and figures

1 How far each exam is: marks in, out of marks expected.

2 Open or close an exam to teachers.

3 The classes and subjects furthest behind. Click one to open its marks.

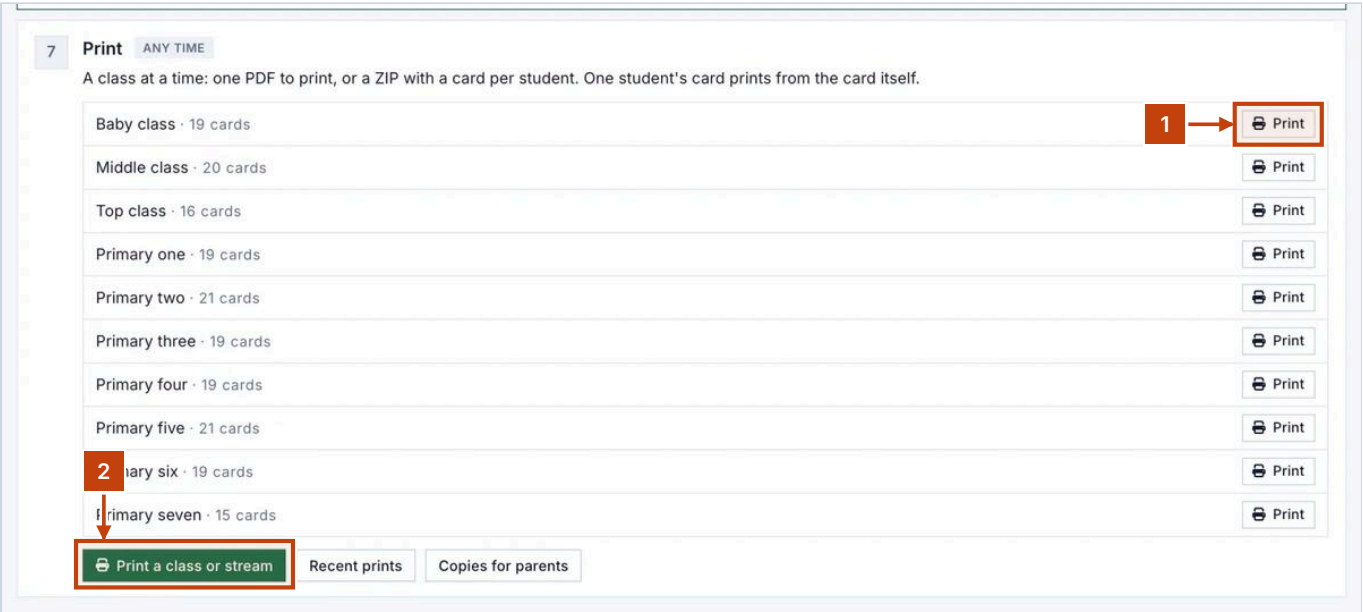
4 Marks entry, for every class and subject.

While teachers enter marks, step 3 shows each exam that counts this term 1: how many marks are in, out of how many are expected. A mark counts as *in* when the teacher has submitted it, or has recorded the student as absent. A mark of 0 that was never submitted does not count.

- **Open to teachers / Closed** 2 opens or closes an exam for marks entry. Close the beginning-of-term exam once it is complete, so marks entered by mistake go nowhere.
- **Furthest behind** 3 lists the classes and subjects with the fewest marks in for the last exam. Click one to open its marks directly, then remind the teacher or enter the marks yourself.
- **Open marks entry** 4 opens › **Marks entry** for every class and subject.

> **TIP**
>
> The teacher of each subject is shown on the marks page. Before the end-of-term meeting, open **Furthest behind** and follow up the top three.

Printing a class



The demo school · invented names and figures

1 Print one class's cards: the print window opens with that class chosen.

2 Choose any class or stream, and the kind of file.

Every class with report cards is listed with its number of cards. **Print** beside a class 1 opens the print window with that class already chosen: pick the layout and press print. **Print a class or stream** 2 lets you choose any class or stream, and whether you want one PDF to print or a ZIP with one file per student. To print one student's card, open that card and print it from there.

> **GOOD TO KNOW**
>
> Printing does not wait for release. You can print a class's cards to check them on paper before you approve them. Parents still see the cards only after release.

What happens next

- Teachers see the exams you opened under **Marks entry**, and can enter marks only while an exam is open.
- When a class is released, its parents can see the report cards in the parents' app and on the parents' pages, unless the student owes fees (see What parents see). The cards also show on the › **Report cards** list.
- Next term, the page starts again at step 1, with everything copied from this term.

QUESTIONS

Where do I go to start a new term's report cards?
Marks & reports › Report cards. The first step, **Set up the term**, asks only for the report title and the grading scale. Everything else is copied from last term.

Do I have to follow the steps in order?
Mostly yes, because each step needs the one before it. **Print** works at any time for classes that already have cards. You can make the cards again whenever marks change.

Can teachers see this page?
Yes. Teachers see how far every step is, but only the director of studies, the head teacher, the deputy and the school administrator can set up, make or release anything here. A class teacher can print their own class's cards from step 7.

What about theology report cards?
Schools with theology classes see a **Secular / Theology** switch at the top. The theology page has the same seven steps, for the theology classes.

Set a term's report settings

Choose the exams that count, who may enter marks, how positions are worked out, what the cards show and the head teacher's message.

For: Director of studies, Head teacher · app.schooldynamics.ug/help/reports/report-settings

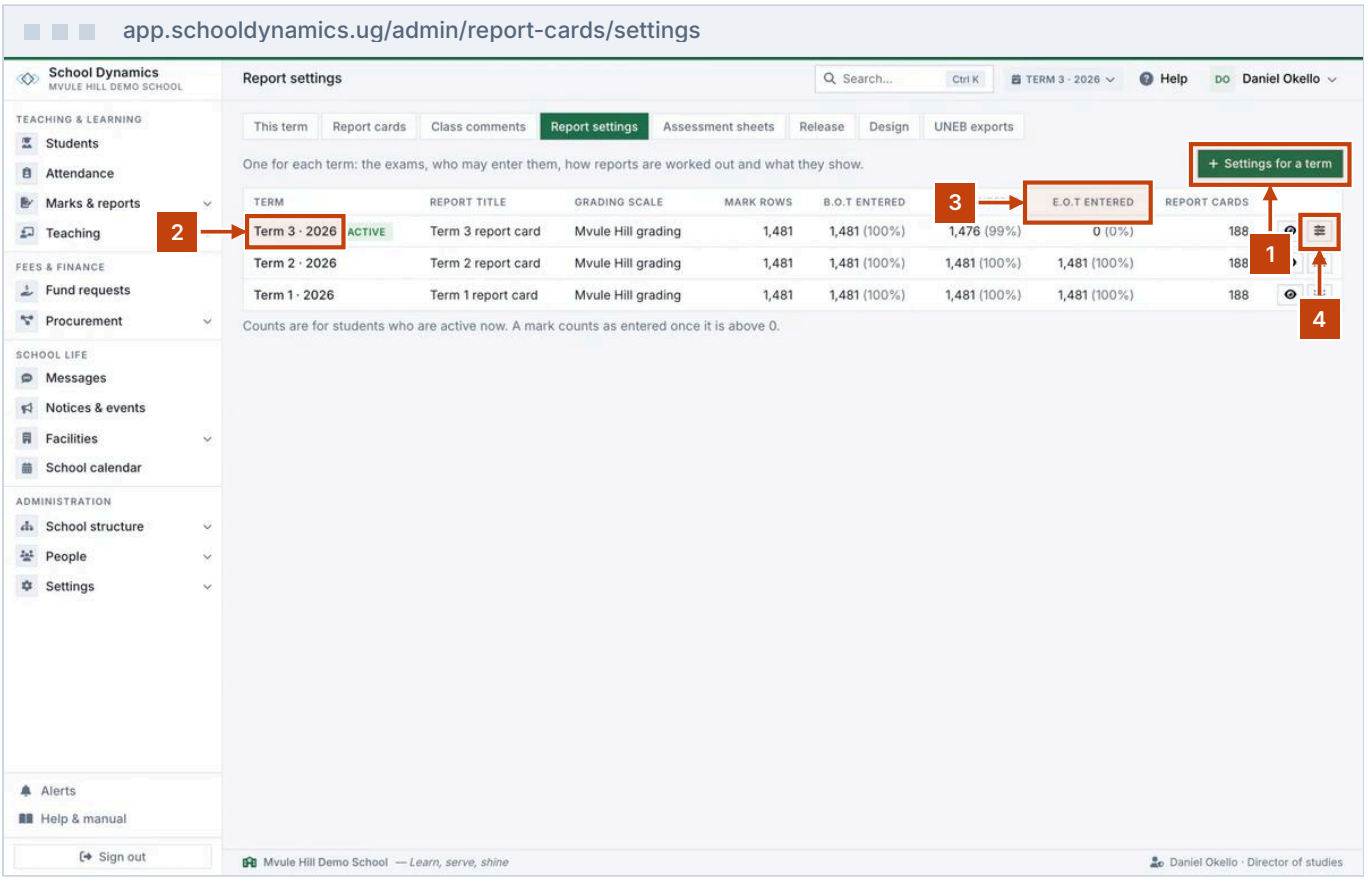
Every term has one set of **report settings**: the report's title and grading scale, which of the three exams count, who may enter their marks, how positions are worked out and what the printed card shows. The report settings are the first step of the term at a glance, which copies them from last term. This lesson explains each choice, so you can change them.

Open them from **Marks & reports › Report cards**, tab **Report settings**.

Before you start

- The director of studies, head teacher, deputy and school administrator can add and change settings. Teachers and the secretary can look at them.
- The school needs a grading scale of its own (see Grading scales).

The list of terms



The demo school · invented names and figures

1 Add the settings for a new term.

2 A term. Click it for a quick view: the exams, how far marking is and the classes furthest behind.

3 How many marks are in for each exam, out of the mark rows.

4 Open the term's settings page.

Each line is one term, newest first. **Settings for a term** 1 adds a term that has none yet. Click a term 2 for a quick view, with **Open the settings** at the bottom.

The figures 3 count marks of students who are active now. A mark counts as entered once it is above 0. The last column counts the report cards made. The settings icon 4 opens the term's page.

Add a term's settings

1. Press **Settings for a term**.
2. Choose the **Term**. Only terms without settings are offered.
3. Type the **Report title**, for example *END OF TERM TWO - 2026*. It is printed at the top of every report card.
4. Choose the **Grading scale**.
5. Press **Add settings**. The term's settings page opens, ready for the exams.

> **TIP**
>
> The quicker way is step 1 of the term at a glance: it copies everything else from last term.

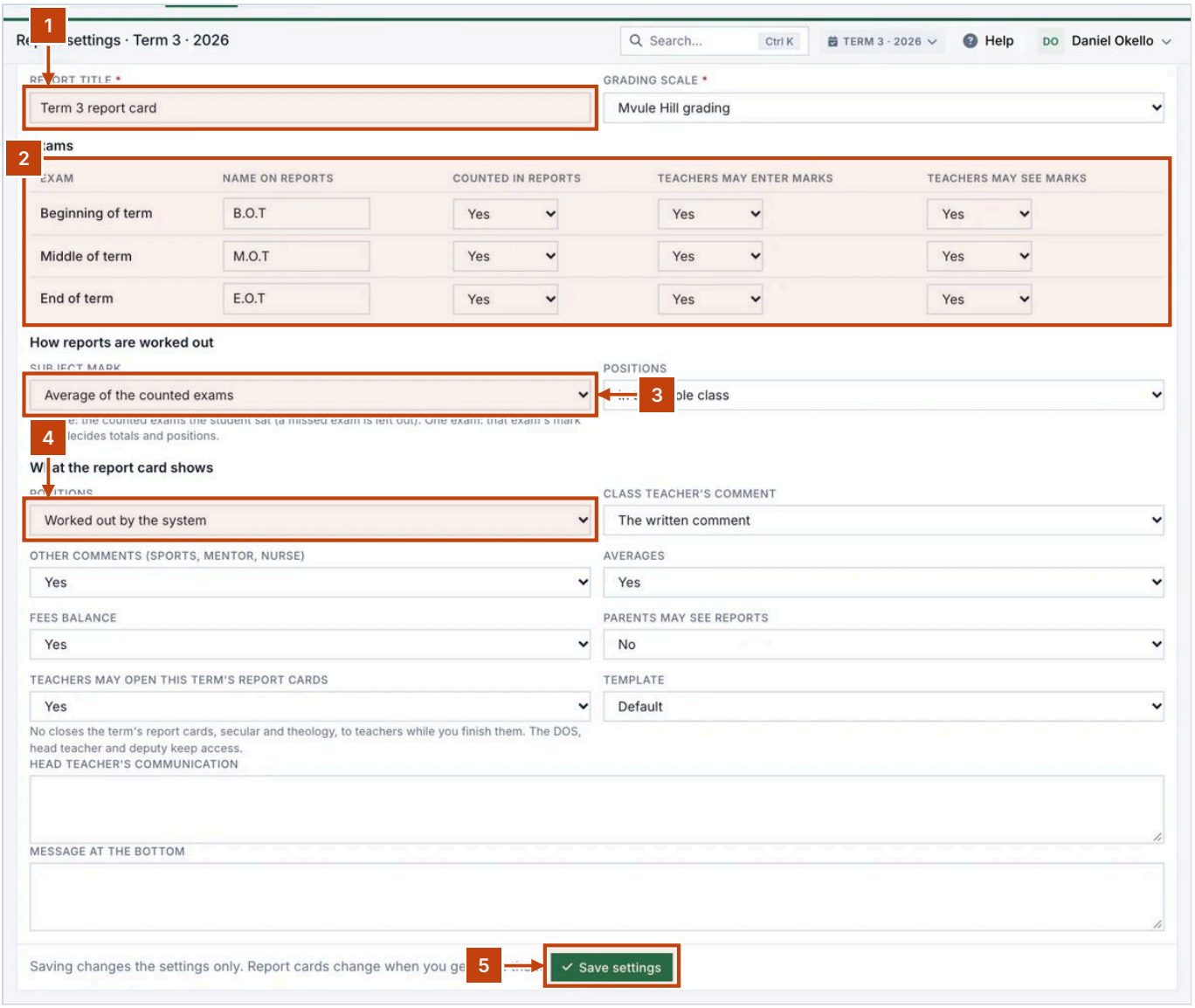
The term's settings page

The page has three tabs:

- **Mark entry progress**: marks entered, by class. Click a class to see its subjects. A class with fewer rows than students says *rows missing*.
- **Settings**: the form below.
- **Generate**: makes the mark rows and the report cards (see Make the report cards). Only those who manage reports see it.

At the top, **Enter marks** opens marks entry for this term, and **Report cards** opens its cards.

The settings, one by one



The demo school · invented names and figures

1 The title printed at the top of every card.

2 Each exam: its name, whether it counts, and whether teachers may enter or see it.

3 How a subject's mark is worked out: the average of the exams, or one exam.

4 What the printed card shows.

5 Save. Nothing is made again until you generate.

Report 1 : the title and the grading scale.

Exams 2 : one line each for the beginning, middle and end of term (B.O.T, M.O.T and E.O.T).

Column	Means
Name on reports	The exam's name on the cards, up to 30 characters (B.O.T unless you change it).
Counted in reports	Yes: the exam's marks count towards the subject's mark.
Teachers may enter marks	Yes: teachers can type this exam's marks. No closes it to them.
Teachers may see marks	When entry is closed, Yes still shows teachers the marks. No hides the exam from them.

The director of studies, head teacher, deputy and school administrator can enter any exam's marks, whether it is open to teachers or not.

How reports are worked out 3 :

- **Subject mark**: *Average of the counted exams* averages the counted exams the student sat; a missed exam is left out, so it does not pull the average down. *One exam's mark* uses one exam alone (choose it under **Which exam**) for the totals and positions.
- **Positions**: *In the whole class* or *Within each stream*.

What the report card shows 4 :

Choice	Options
Positions	*Worked out by the system*, *A space to write one* (written by hand on the printed card), or *No positions*.
Class teacher's comment	*The written comment*, *A space to write one*, or *No comment*.
Other comments (sports, mentor, nurse)	Yes or No.
Averages	Yes or No: the average column.
Fees balance	Yes or No.
Parents may see reports	Used when you save copies for the parents' app (see What parents see).
Teachers may open this term's report cards	*No, closed to teachers* hides the term's cards from teachers while you finish them. The DOS, head teacher and deputy keep access.
Template	A choice kept from the old app. How cards look is chosen under Card design.

Head teacher's communication prints on every card of the term, under the comments. **Message at the bottom** is a note at the foot of the card. Neither is copied to the next term.

Press **Save settings** 5 . *Report settings saved. Nothing was regenerated.*

> ⚠ CAREFUL
>
> Saving changes the settings only. If you change the exams counted, the subject mark or the grading scale after cards are made, the cards are marked **out of date** and cannot be released until you make them again.

When saving is refused

You see	Do this
Give the report a title, like END OF TERM TWO - 2026.	Type a title of 2 to 200 characters.
Choose the exam whose marks make the report.	You chose *One exam's mark*: pick the exam under **Which exam**.
Give each exam a name of up to 30 characters, like B.O.T.	Shorten the exam's name, or fill in a blank one.
Choose one of this school's grading scales (Administration › Grading).	Pick one of your own scales.

Theology settings

Schools with theology classes have a **Theology settings** tab with the same page for the theology report cards. It has no class teacher's comment choice, no other comments and no *Teachers may open* switch; the one on the secular settings closes both kinds of card to teachers. In theology, a blank or 0 counts as 0 in the average; only an exam entered as absent in the marks grid is left out. See Theology marks.

Good to know

- Warnings at the top of the page tell you when the grading scale is another school's, when the old app still has a step waiting on these settings (saving here clears it), and when the old app left two cards for one student (the newest is the one used).
- Next term, step 1 of the term at a glance copies these settings, except the head teacher's communication and the message at the bottom.

QUESTIONS

Can I change a term's settings after the report cards are made?
Yes. Saving never changes the cards by itself. If you changed the exams counted, the method or the grading scale, the cards say they are out of date: make them again.

Why are all exams out of 100?
Every exam is marked out of 100. The system always keeps the maximum at 100, so there is no maximum to set.

Can a term have two sets of settings?
No. A term has one set of report settings. The **Settings for a term** window lists only the terms that have none yet.

The page says the grading scale belongs to another school. What do I do?
Choose one of your own school's scales under **Settings** and save. The old app gave many schools a shared scale; if that school edits it, your grades would change.

Enter marks

Type your class's beginning, middle and end of term marks on a laptop or a phone. Each mark saves as you leave its box.

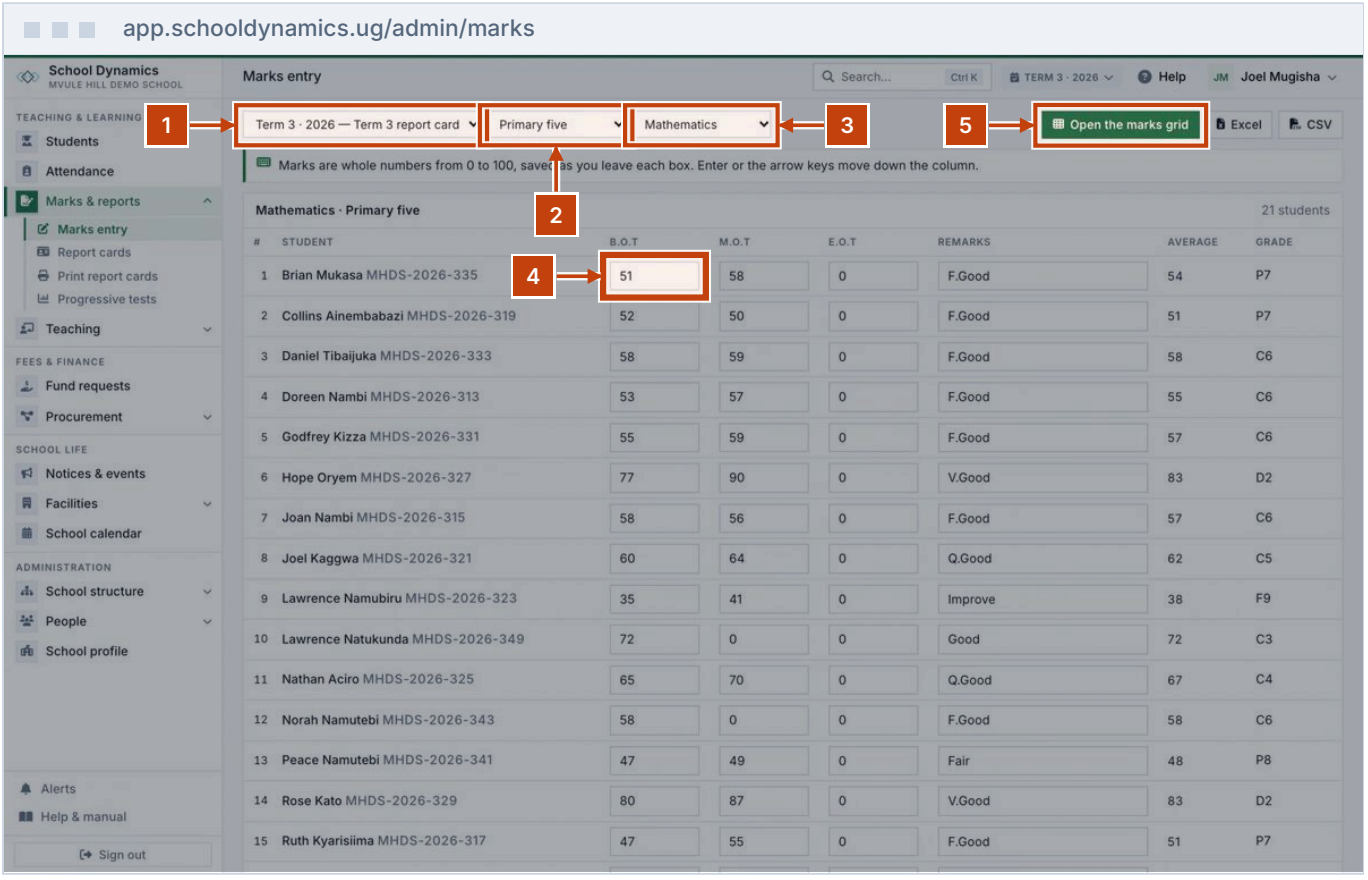
For: Teacher, Director of studies · app.schooldynamics.ug/help/reports/entering-marks

Teachers enter each exam's marks under **Marks & reports › Marks entry**. You choose your class and subject, and type each student's mark. There is no submit button: every mark saves as you leave its box. Use a laptop, or a phone through the marks grid.

Before you start

- The term needs report settings and mark rows. The director of studies makes them (see The term at a glance). If there are none, the page says *No mark rows for this subject yet*.
- You can enter marks for the subjects you teach, and for every subject of a class you are class teacher of. The director of studies, head teacher, deputy and school administrator can enter any subject.
- An exam must be open to teachers. The director of studies opens and closes each exam.

Enter marks on a laptop



The demo school · invented names and figures

1 The term. It starts on the term in the top bar.

2 Choose your class

3 Choose the subject. Only yours are listed.

4 Type the mark and move on: it saves itself.

5 The grid: pasting, absent marks, and work without internet.

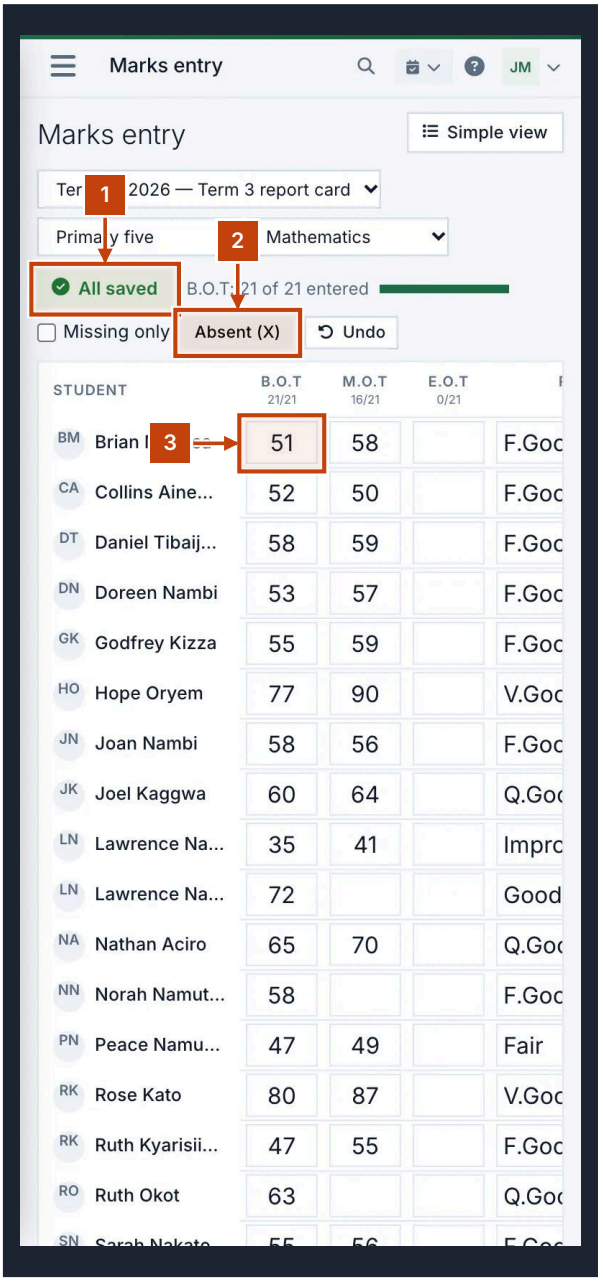
1. Check the term 1. It starts on the term chosen in the top bar.
2. Choose your class 2. If the class has streams, you can also choose one stream, or keep *All streams*.
3. Choose the subject 3.
4. Type the first student's mark 4 and press Enter. The cursor moves down the column, and *Saved* shows on the line.
5. Carry on down the column. ↑ and ↓ also move up and down.

Marks are whole numbers from 0 to 100. A blank box counts as 0. The **Remarks** box takes a short note, but making the report cards replaces remarks with the automatic ones (*Good*, *V.Good* ...).

The **Average** and **Grade** columns fill in when the director of studies makes the report cards. They do not change as you type here.

Excel and **CSV** download this subject's marks for the class. **Open the marks grid** 5 opens the same marks as a spreadsheet.

Enter marks on a phone: the marks grid



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1 All saved, or how many marks are waiting to be sent.

2 Mark the box you are in as absent.

3 Tap a box and type. Enter goes down the column.

The marks grid works on a phone, a tablet or a laptop. Choose the class and subject as above, then:

- Tap a box and type. **Enter** goes down, **Tab** goes across, the arrow keys move, **Esc** puts a box back as it was, and **Undo** (or **Ctrl** + **Z**) takes back the last change.
- The status 1 says *All saved*, or how many marks are still being sent. If the internet goes off, your marks wait on the device and are sent when it comes back.

- **Missing only** hides the students whose mark is in.
- On a laptop, you can paste a column or a block copied from Excel or Google Sheets.
- The last columns (average, grade, aggregates) are worked out as you type, as a preview.
- **Simple view** goes back to the plain marks page.

A student who was absent

Press **Absent** 2 while you are in the student's box, or type the absent mark (**X**, unless your school chose **-**). The box stays blank and the mark counts as *in*, so the class is not shown as behind. On the secular report card, a missed exam is left out of the student's average. The director of studies or head teacher chooses X or - with **Absent is typed as**, at the top of the grid.

When someone else changed the same mark

If another person saved a different mark in the same box while you were typing, the box says *Changed by someone else* and shows both marks. Press **Keep ...** to keep theirs, or **Keep yours: ...** to keep yours.

When a mark is refused

You see	Why, and what to do
Marks are whole numbers from 0 to 100.	Type a whole number. Decimals and letters are refused.
... is closed for entry.	The exam is closed to teachers. Ask the director of studies.
Term 2 · 2026 is closed: the school is now in Term 3 · 2026 ...	The term is over. Teachers can no longer change its marks; the director of studies or head teacher can.
Released to parents: this class's report cards for the term are out ...	The class's cards are released. To correct a mark, the director of studies or head teacher reopens the class (see Check, approve and release).
Released: this student's report card is ready for parents ...	That one card is visible to parents. It must be marked not ready first (see What parents see).

Good to know

- Every change to a mark is kept in the school's audit log, with who made it and the mark before and after.
- The director of studies follows how far each class is on the term at a glance. A mark counts as *in* once it is above 0, or entered as absent in the grid.
- When the term's report cards are made, the marks you entered become each subject's average, grade and aggregates. If you change a mark after that, the class's cards are marked out of date until they are made again.

QUESTIONS

Do I have to press a Submit button?
No. Each mark saves when you leave its box, and *Saved* shows on the line. A mark above 0 counts as submitted.

Why is my subject missing from the list?
You see only the subjects you teach and, if you are a class teacher, every subject of your class. A subject's teachers are set on the class page: ask the director of studies.

Why can I not type in a column?
The director of studies has closed that exam to teachers. The page says *... is closed for entry*. Ask them to open it if marks are still missing.

A new student is not on my list.
The page says how many students joined after the mark rows were made. Press **Add them** (or **Add them all**) and they appear.

What if a student missed the exam?
In the marks grid, type the absent mark (X unless your school chose -). The box stays blank, the mark counts as in, and the student's average leaves that exam out.

Theology marks and report cards

Enter theology marks and make theology report cards. The steps are the secular ones; a few rules differ, and this lesson lists them.

For: Teacher, Director of studies · With theology · app.schooldynamics.ug/help/reports/theology-marks

Schools with theology classes keep a second set of marks and report cards for them, beside the secular ones. Everything works the way the secular track does, on its own pages: **Marks & reports › Theology marks** for teachers, and the theology tabs under **Marks & reports › Report cards** for the director of studies. This lesson covers what is different. Read Enter marks first.

Before you start

- The school has theology classes, with their subjects and each subject's teachers set on the theology class's page (see Theology classes).
- The term has **theology** report settings and theology mark rows. Use the **Theology** side of the term at a glance: the **Secular / Theology** switch at the top.

Enter theology marks

Open **Marks & reports › Theology marks**. Choose the term, the theology class (and stream), then the subject, and type the marks, exactly as in Enter marks. **Open the marks grid** opens the theology marks grid, which works on a phone and keeps marks while the internet is off.

You can enter marks for the theology subjects you teach (as subject teacher or second, third or fourth teacher), and for every subject of a theology class you are class teacher of.

> ⚠ **CAREFUL**
>
> In theology, a blank or a 0 is a mark of 0 and pulls the average down. For a student who missed an exam, use **Absent** in the marks grid (or type X, or - if your school chose it). An exam entered as absent is left out of the student's average.

How theology report cards differ

Theology cards are made, commented, checked and released with the same buttons as secular cards. The rules of the sums differ:

	Secular	Theology
A missed exam (0 or blank)	Left out of the average	Counts as 0, unless entered as absent
An exam mark of 0	Graded X	Graded on the scale, usually F9
Subjects that count	Only subjects marked as graded	Every subject
Divisions	4–12 Division 1, 13–24 Division 2, 25–29 Division 3, 30–35 Division 4, then U; below 4 is X	1–12 Division 1, 13–24 Division 2, 25–29 Division 3, 30–34 Division 4, then U
A student with no marks at all	X	X

The theology report settings have no class teacher's comment choice, no sports, mentor or nurse comments and no *Teachers may open* switch. Theology cards carry the class teacher's and head teacher's comments only.

The theology report cards

Under **Marks & reports › Report cards**, the **Theology report cards** tab lists the theology cards, with the same filters as the secular list. Click a student to read the card. **Primary report card** on a theology card (and **Theology report card** on a secular one) moves between the two cards of the same student.

A class teacher of a theology class can write the class teacher's comment. Everything else on the card is for the director of studies, head teacher, deputy and school administrator.

Good to know

- Theology cards print with the secular card. In the print window, the designs *Secular and theology on one page* and *Secular and theology side by side* put both on one card; *Theology only* prints the theology card alone (see Print report cards).
- When a theology class is released, its marks lock. The **Send to parents** button belongs to the secular class: parents get the theology results inside the secular card.
- A secular card that parents can already see also locks the student's theology marks, because the parents' copy prints both.

QUESTIONS

Why do I not see Theology marks in my menu?
It shows only in schools that have theology classes, and only to staff who enter marks. A school turns theology on in its school profile (**Does the school teach theology?**), then sets up its theology classes.

Do parents get a separate theology report card?

No. The theology results print on the student's secular report card (the *Secular and theology on one page* design). Releasing a theology class locks its marks, but messages to parents go from the secular class.

A student missed a theology exam. Does a 0 count against them?

Yes, unless you enter them as absent in the marks grid. In theology a blank or 0 counts as 0 in the average; an exam entered as absent is left out.

Make the report cards

Work out every student's grades, aggregates, division and position from the marks, then read and correct the cards.

For: Director of studies, Head teacher · app.schooldynamics.ug/help/reports/making-report-cards

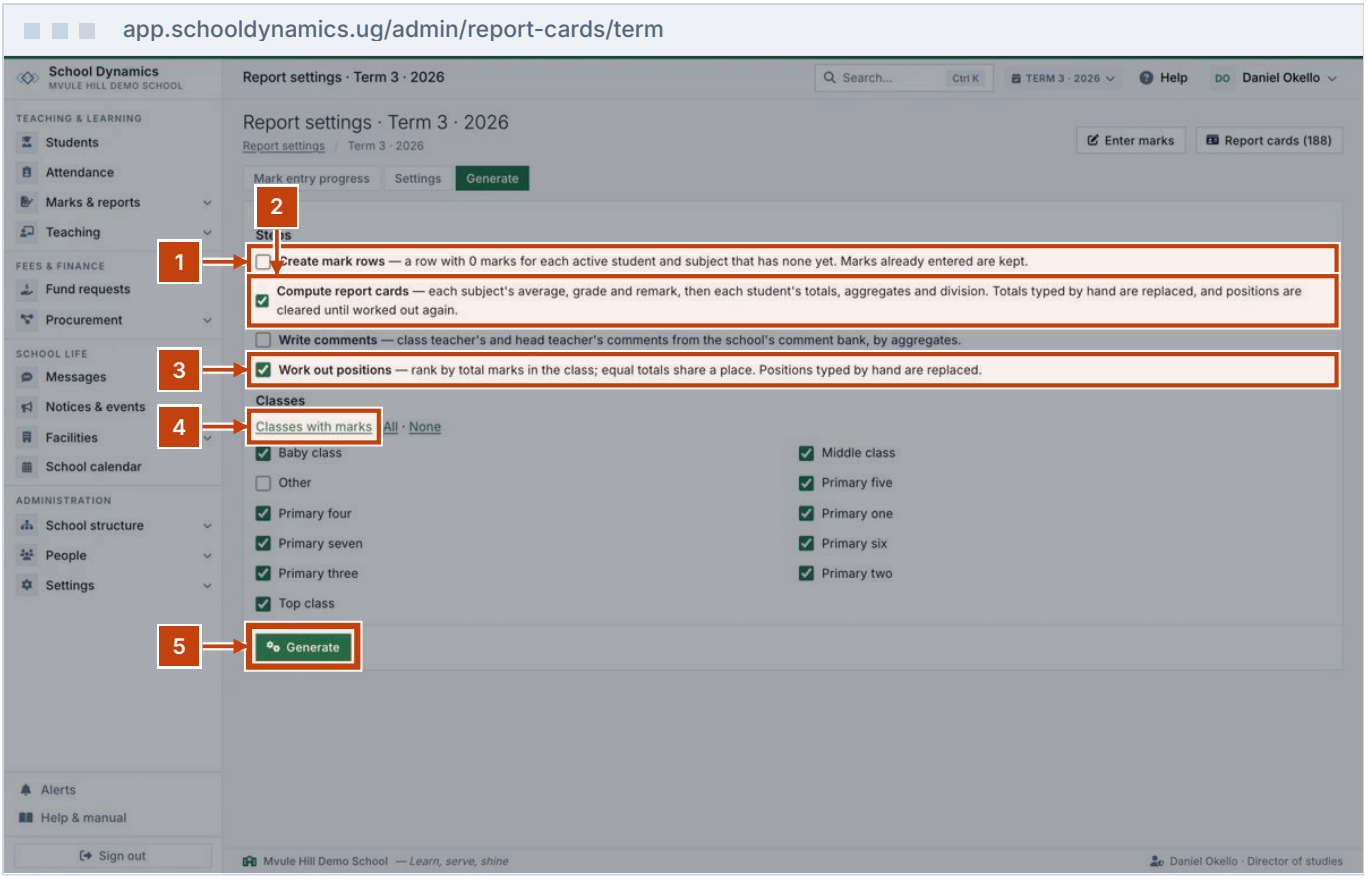
Once marks are in, the director of studies **makes the report cards**: the system works out each subject's average and grade, then each student's totals, aggregates, division and position. You can make them as often as you like. Make them again whenever marks change.

Before you start

- The director of studies, head teacher, deputy and school administrator make the cards. Teachers can read the cards of the term (unless the term is closed to teachers).
- The term has report settings with at least one exam counted and a grading scale (see Report settings), and its mark rows exist.

Make the cards

The quickest way is step 4 of the term at a glance: **Make the report cards** works out the cards and the positions of every class with marks, and the missing comments if you tick it. To choose the steps and classes yourself, use the **Generate** tab of the term's settings.



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1. Rows for students and subjects that have none. Marks entered are kept.
2. Grades, totals, aggregates and divisions, from the marks.
3. Rank the students by total marks.
4. Choose the classes: those with marks, all, or none.
5. Run the chosen steps.

1. Open **Marks & reports › Report cards**, then **Change settings** on step 1 (or the **Report settings** tab, then the term).
2. Open the **Generate** tab.
3. Tick the steps 1 2 3. **Write comments** also fills comments from the comment bank (see Comments).
4. Choose the classes 4: **Classes with marks**, **All** or **None**, then tick or untick single classes.
5. Press **Generate** 5 and confirm. The confirmation says what will be replaced.

A progress bar shows while it runs. You can leave the page: the job carries on, and its progress follows you on other pages. When it ends, the page says *Last run* and what was done, for example *1,214 report cards computed; 1,214 students ranked*.

> ⚠ CAREFUL
>
> **Compute report cards** replaces totals typed by hand and clears positions until **Work out positions** runs again. **Work out positions** replaces positions typed by hand. Tick both together.

What the system works out

For each subject of each student:

- **Each exam's grade** from the grading scale. A score below 1 is graded X.
- **The subject's mark**: with *Average of the counted exams*, the average of the counted exams the student sat, cut to a whole mark. A missed exam (0) is left out. With *One exam's mark*, that exam's score.
- **Grade and aggregates** from the grading scale for that mark. A mark below 1 has no grade.
- **Remark**: below 39 *Improve*, below 49 *Fair*, below 59 *F.Good*, below 69 *Q.Good*, below 79 *Good*, below 90 *V.Good*, otherwise *Excellent*; a mark below 1 gets -. This replaces remarks typed during marks entry.

For each student:

- **Total marks** and **aggregates** add up the subjects that count (subjects set as graded). Other subjects print but do not count.
- **Division** from the aggregates: below 4 is X, 4–12 Division 1, 13–24 Division 2, 25–29 Division 3, 30–35 Division 4, above 35 U.
- **Position** by total marks, in the class or in each stream (the settings say which). Equal totals share a place and the next place is skipped (1, 1, 3). Only students who are active now are ranked.

> ⓘ GOOD TO KNOW
>
> These division bands are the ones School Dynamics has always used. They are not exactly the PLE bands. Results analysis shows each upper class's divisions by the PLE rule beside them.

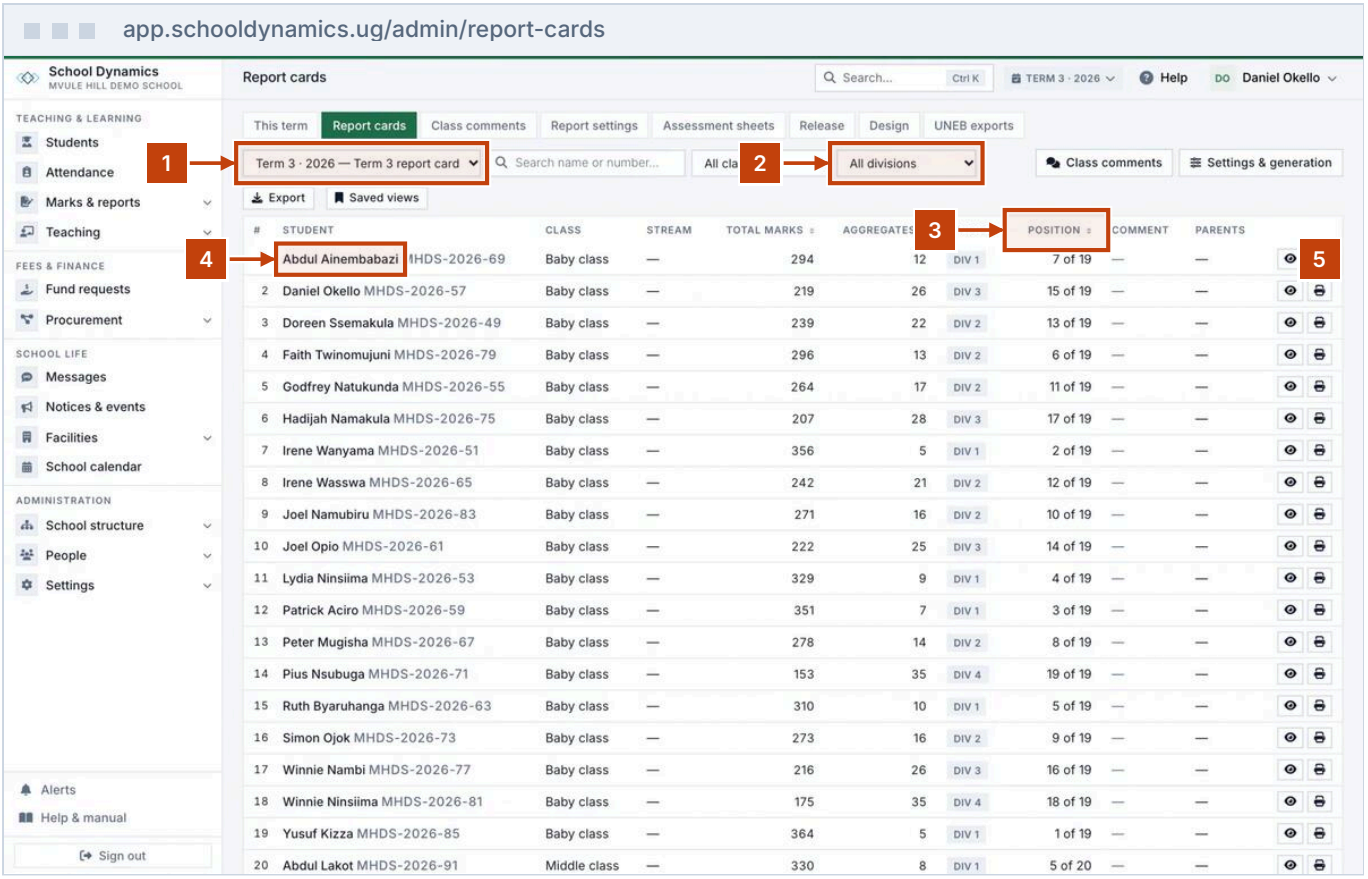
Classes already released to parents are left as they are: the job says so. To change one, reopen it first (see Check, approve and release).

When cards are out of date

A card is out of date when a mark of its student changed after it was made, or when the exams counted, the method or the grading scale changed. The report cards list, the settings page and the print window then say *... report cards are out of date* and name the classes. Press **Make them again**: only those classes are computed and ranked again, and their comments stay. An out-of-date class cannot be checked or released.

The report cards list

Open **Marks & reports › Report cards**, tab **Report cards**.



The demo school · invented names and figures

1 The term's report.

2 Show one division, or the cards missing a subject.

3 Sort by total marks, aggregates or position.

4 Open the card in a quick view.

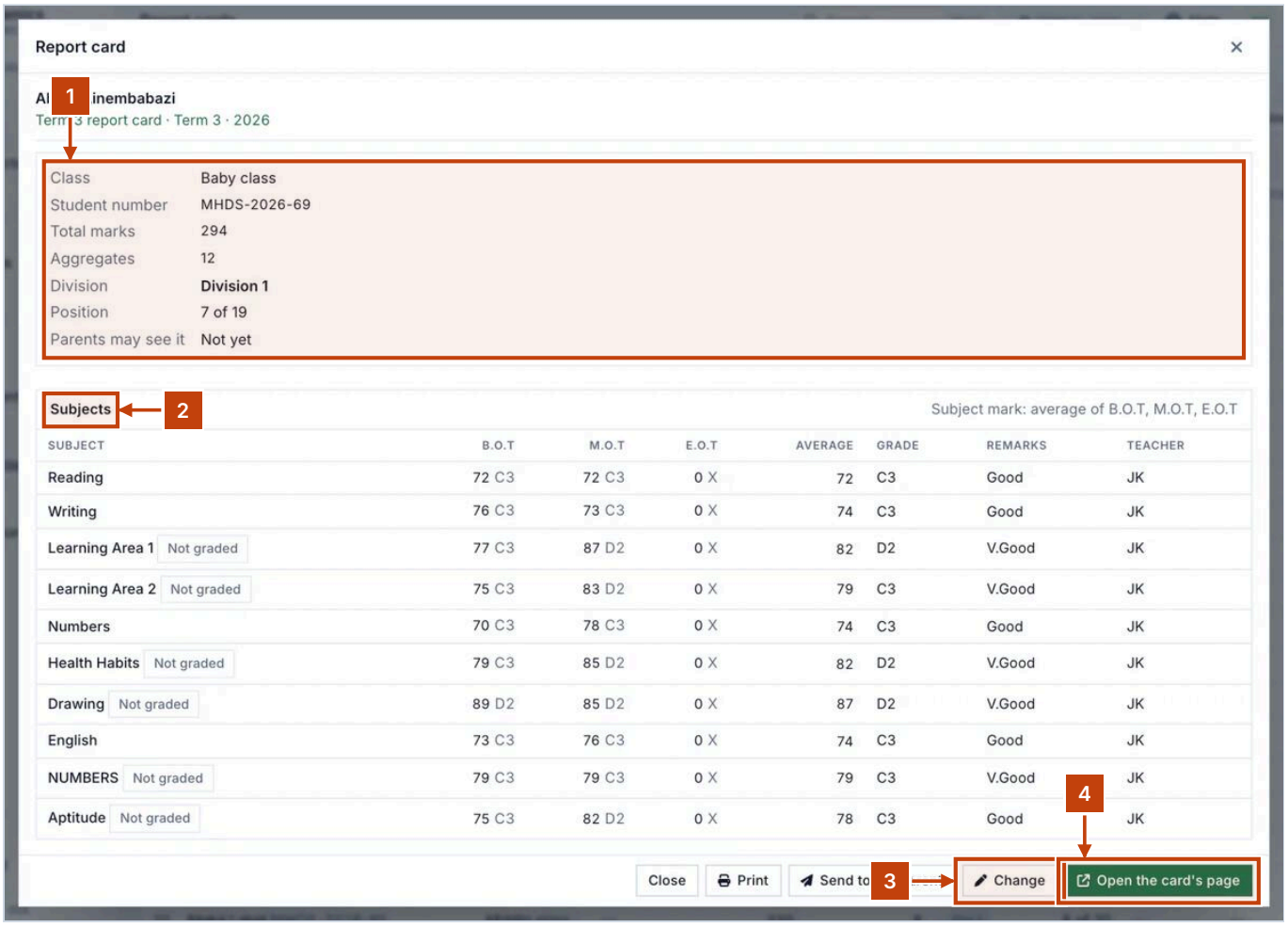
5 Print one card.

Choose the term's report 1, then search by name or number, or choose a class, stream or division 2. *Missing a subject* shows the cards with a counted subject that has no mark. Click a column heading 3 to sort. Each line shows the total marks, aggregates, division, position (*3 of 41*), whether a class teacher's comment is written, and **Ready** when the card is marked ready for parents.

Export downloads every line the filters show, to Excel or CSV. **Saved views** keeps a set of filters under a name. **Class comments** and **Settings & generation** open those pages for the term.

Click a student 4 for a quick view of the card, or the print icon 5 to see it as it prints.

Read and correct one card



The demo school · invented names and figures

1 Totals, aggregates, division and position.

2 Each subject: the exams, the average, the grade and the remark.

3 Correct the card or write its comments.

4 The card on a page of its own.

The quick view shows the card as parents read it 1 2: the class, totals, aggregates, division, position, each subject's exams, average, grade, remark and teacher's initials, then the comments, the head teacher's message and the note.

- **Change** 3 opens *Change the report card*: **Total marks**, **Aggregates**, **Division**, **Parents may see it**, **Position**, **Out of** and the five comments. Press **Save report card**. A division is 1, 2, 3, 4, U or X; numbers cannot be below 0.
- **Print** opens the card as it prints, with **Download**.
- **Send to the parent** sends this one card's link again (see Check, approve and release).
- **Open the card's page** 4 shows the same card on its own page.

Teachers do not see **Change**. Any teacher can write the sports and mentor comments, and the class teacher also writes the class teacher's and nurse's comments, so they see **Write comments** instead (see Comments).

Good to know

- Every change made by hand to a card is kept in the school's audit log, with the value before and after.
- If the old app left two cards for one student in a term, the newest is the one shown, printed and updated. An older copy says so and links to the card in use.
- When the director of studies closes the term's cards to teachers (in the report settings), teachers see *Report cards for this term are closed to teachers by the school administrator* instead of the list.

QUESTIONS

Teachers changed marks after I made the cards. What now?
The cards of that class are marked out of date. Press **Make them again** on the warning (or on the term at a glance). Only the classes out of date are made again; comments stay.

Can I type a position or a total by hand?
Yes, with **Change** on the card. But making the cards again, or working out positions again, replaces what you typed.

Why does a student who left have no position?
Only students who are active now are ranked and counted in the class size. A student who left keeps their card and marks, without a position.

Why is a card's division better than its marks suggest?
A subject that counts has no mark, so the aggregates add up the other subjects only. The list warns *... cards have a counted subject with no mark*. Enter the missing marks and make the cards again.

Write report card comments

Write the class teacher's and head teacher's comments for a whole class on one page, fill blanks from the comment bank, and keep the bank up to date.

For: Teacher, Director of studies, Head teacher · app.schooldynamics.ug/help/reports/comments

Each report card carries a class teacher's comment and a head teacher's comment, and can carry sports, mentor and nurse comments. You can write them one card at a time, a whole class on one page, or let the system fill blanks from the school's comment bank.

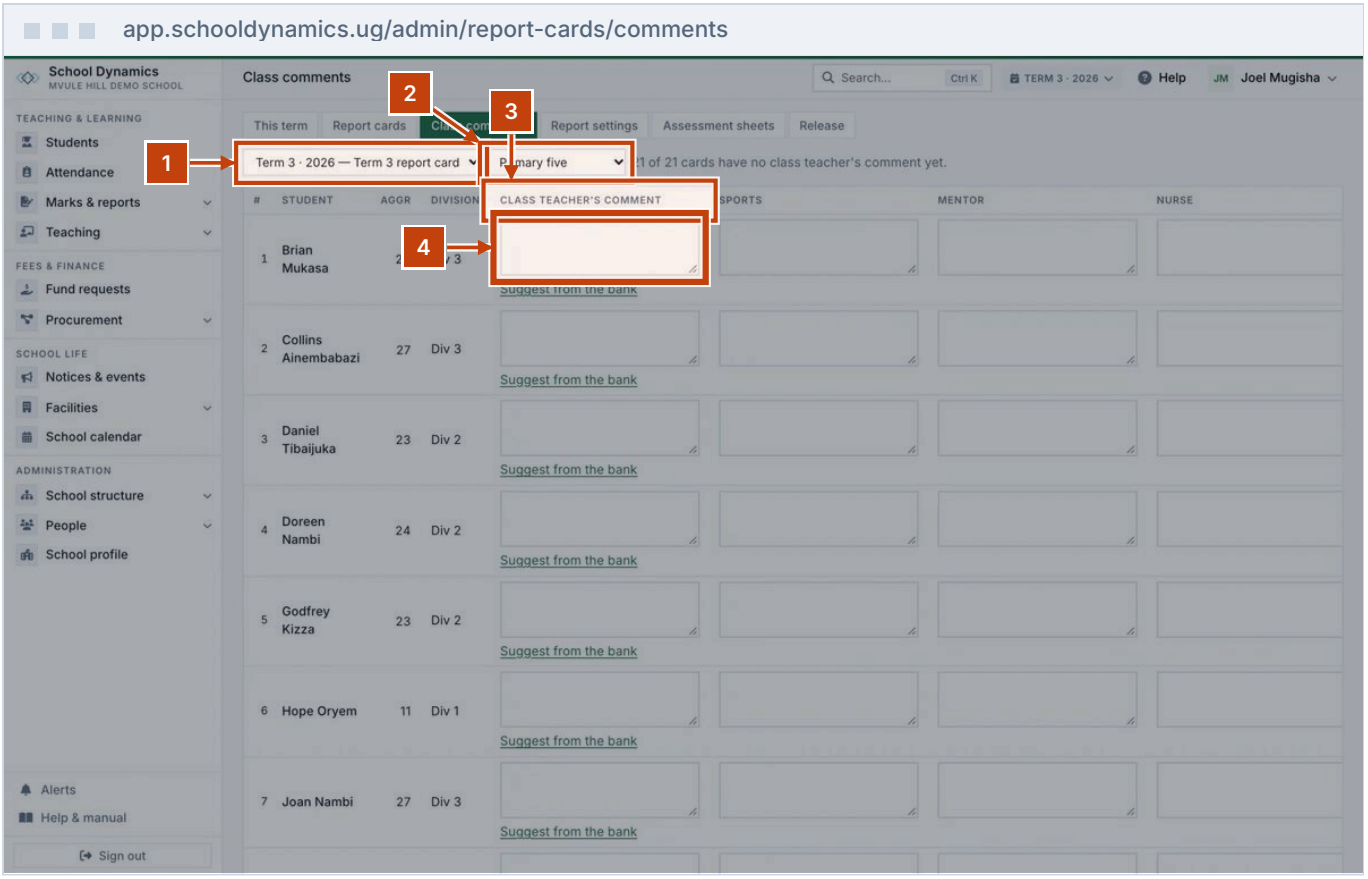
Who writes which comment

Comment	Who may write it
Class teacher's comment	The class teacher (or the stream's teacher), and those who manage reports
Head teacher's comment	The director of studies, head teacher, deputy and school administrator
Sports and mentor comments	Any teacher, and those who manage reports
Nurse's comment	The class teacher, and those who manage reports

Theology cards have the class teacher's and head teacher's comments only.

Write a class's comments on one page

Open **Marks & reports › Report cards**, tab **Class comments**.



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1 The term's report.

2 Your class. Only classes you are class teacher of are listed.

3 The comments you may write, one column each.

4 Type, then click away: it saves.

1. Check the term's report 1.
2. Choose the class 2. Teachers see only the classes they are class teacher of; the director of studies sees every class.
3. Type the first student's comment 4, then click or tab away. *Saved* shows under the box.
4. Carry on down the list.

Each line shows the student's aggregates and division, so the comment can match the results. There is one column 3 for each comment you may write. A line at the top counts the cards that still have no class teacher's comment.

Under an empty class teacher's or head teacher's box, **Suggest from the bank** fills it with a comment from the bank for that student's aggregates, and saves it. Change the words if you wish; the box saves again when you leave it.

If the class is released, a notice says so and the boxes cannot be changed.

Write one card's comments

Open the card from the report cards list and press **Write comments** in its quick view. On the card's own page, and for those who manage reports, the button is **Change**; a theology class teacher sees **Write the class teacher's comment**. Under the class teacher's and head teacher's boxes are three helpers:

- **From the comment bank (...)**: the bank's comments for this card's band. Pick one to put it in the box.
- **Add a behaviour sentence**: sentences about behaviour, grouped (for example *Discipline*), marked praise or concern. Pick one to add it to the end of the comment.
- **AI draft**: shows only when the school has switched AI suggestions on. It writes a draft from the student's marks and attendance. Read it and change it before saving.

Nothing is saved until you press **Save comments** (or **Save comment**, or **Save report card**).

Fill every blank comment at once

The director of studies can fill the blanks for the whole term:

- On the term at a glance, step 5: **Write the missing ones from the comment bank**.
- When making the cards: tick *Also write comments from the comment bank, where none is written yet*.
- On the **Generate** tab: tick **Write comments**. With *Only where no comment is written yet* ticked (the default), typed comments are kept. Untick it to write every card's comments again.

For each card, the system picks one comment at random from the bank's band that holds the student's total aggregates, and writes both the class teacher's and head teacher's comments from it. Cards below 3 aggregates, and cards whose band has no comment, are left as they are.

The comment bank

The bank is under **School structure › Grading**, tab **Report comments**. The director of studies, head teacher, deputy and school administrator can change it.

- **Add the standard comments** adds 40 ready-made comments in five bands (0–12, 13–24, 25–28, 29–32 and 33–36 aggregates). A school's own comments are not added twice.
- **New comment** opens a form: **From (aggregates)**, **To (aggregates)**, the **Class teacher's comment** and the **Head teacher's comment** (both needed, 5 to 500 characters). Press **Add comment**.
- The pen and bin icons edit and remove a comment.

In a comment, these words are filled in for each student: **[NAME]** (the student's name), **[HE_OR_SHE]**, **[HIS_OR_HER]** and **[HIM_OR_HER]** (He, His, Him for a boy; She, Her, Her for a girl; He/She, His/Her, Him/Her when the sex is not recorded). The form shows how the comment reads for a girl and for a boy. Any other word in square brackets is refused, so a misspelt word is caught before it prints.

The **Behaviour comments** tab holds the behaviour sentences. **Add the standard sentences** adds a ready-made set; **New sentence** asks for the **Behaviour**, whether it is *Praise* or *Concern*, and the sentence. Behaviour sentences are never written onto cards by themselves: a teacher adds them.

AI comment drafts for a class

When the school has AI suggestions switched on, the dashboard offers **Draft report-card comments with AI**. Its page lists a class's cards with their comments. **Draft** asks for one draft; **Draft the ones without a comment** asks for drafts for the cards that have none, up to ten at a time, within the school's daily allowance. **Read and approve** opens the draft: change it, then press **Approve and save** to write it on the card, or **Discard the draft**. Only figures are sent to make a draft, never a student's name. If the page says *AI suggestions are switched off for your school*, the head teacher or school administrator can switch them on from **Alerts**.

Good to know

- Every saved comment is kept in the school's audit log.
- A comment is at most 1,000 characters.
- Before a class is checked, the release page counts the cards without a class teacher's or head teacher's comment.

QUESTIONS

Who writes the head teacher's comment?
The director of studies, head teacher, deputy or school administrator. Class teachers write the class teacher's comment.

Making the cards again, does it wipe the comments I typed?
No. Computing the cards leaves comments alone. Only **Write comments** with *Only where no comment is written yet* unticked writes over typed comments.

Why did a student get no comment from the bank?
No comment is written below 3 aggregates, and none when the bank has no comment for the student's aggregates. Add one under **Grading › Report comments**.

Can I change a comment after the class is released?
No. Released cards are locked. The director of studies or head teacher reopens the class first, giving a reason.

Check, approve and release report cards

Each class's cards are checked by the class teacher, approved by the DOS or head teacher, then released to parents and sent to them.

For: Director of studies, Head teacher, Teacher · app.schooldynamics.ug/help/reports/checking-approving-releasing

Parents see a class's report cards only after the class is released. Before that, the cards go through two checks: the class teacher checks them, and the director of studies or head teacher approves them. Each class moves on its own, so a finished class can go out while another is still being corrected.

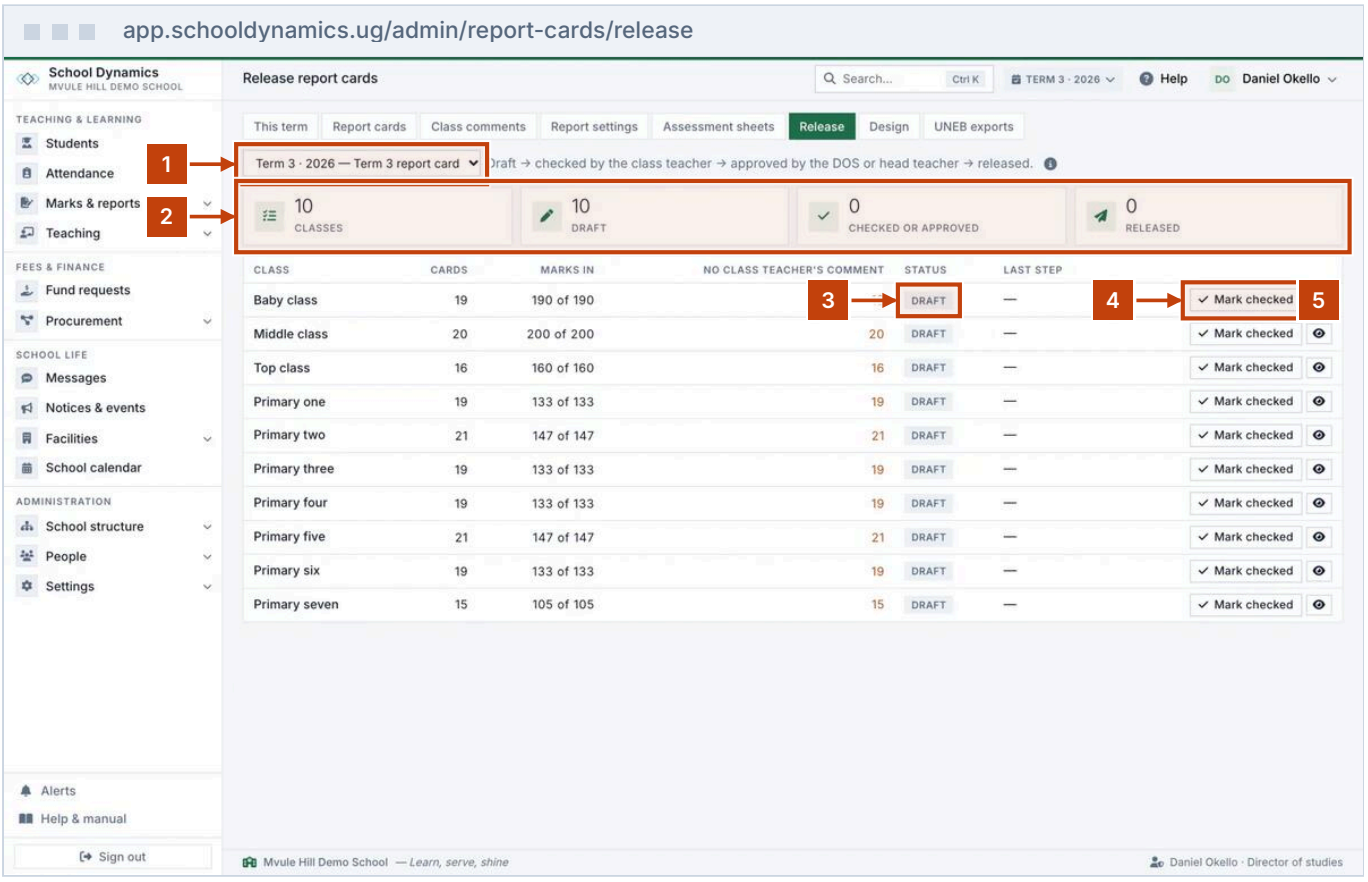
Draft → checked by the class teacher → approved by the DOS or head teacher → released.

Open **Marks & reports › Report cards**, tab **Release**.

Before you start

- The class has report cards, and none is out of date (see Make the report cards).
- Write the comments first (see Comments). The page counts the cards without them.
- Who does what: the class teacher (or a stream's teacher) checks. The director of studies, head teacher, deputy and school administrator can check, approve, release and reopen. Teachers see only the classes they are class teacher of.

The release page



The demo school · invented names and figures

1 The term's report.

2 How many classes are at each stage.

3 Where each class is: Draft, Checked by the class teacher, Approved or Released to parents.

4 The next step you may take for that class.

5 Open the class: its figures, history, print and sending.

Choose the term's report 1. Schools that also have theology or new-curriculum cards choose which kind first. The figures 2 count the classes at each stage.

Each line is a class with marks or cards: how many cards, how many marks are in, how many cards have no class teacher's comment, its stage 3 and the date of its last step. The button 4 is the next step you may take. The eye 5 opens the class.

The steps

1. **Check.** The class teacher reads the class's cards (print them, or open them from the report cards list), then presses **Mark checked**. *Checked: the DOS or head teacher can approve it now.*
2. **Approve.** The director of studies or head teacher presses **Approve**. *Approved: it can be released to parents.*
3. **Release.** They press **Release to parents** and confirm. The class's marks and comments lock.
4. **Send.** Open the class and press **Send to parents...** (see below).

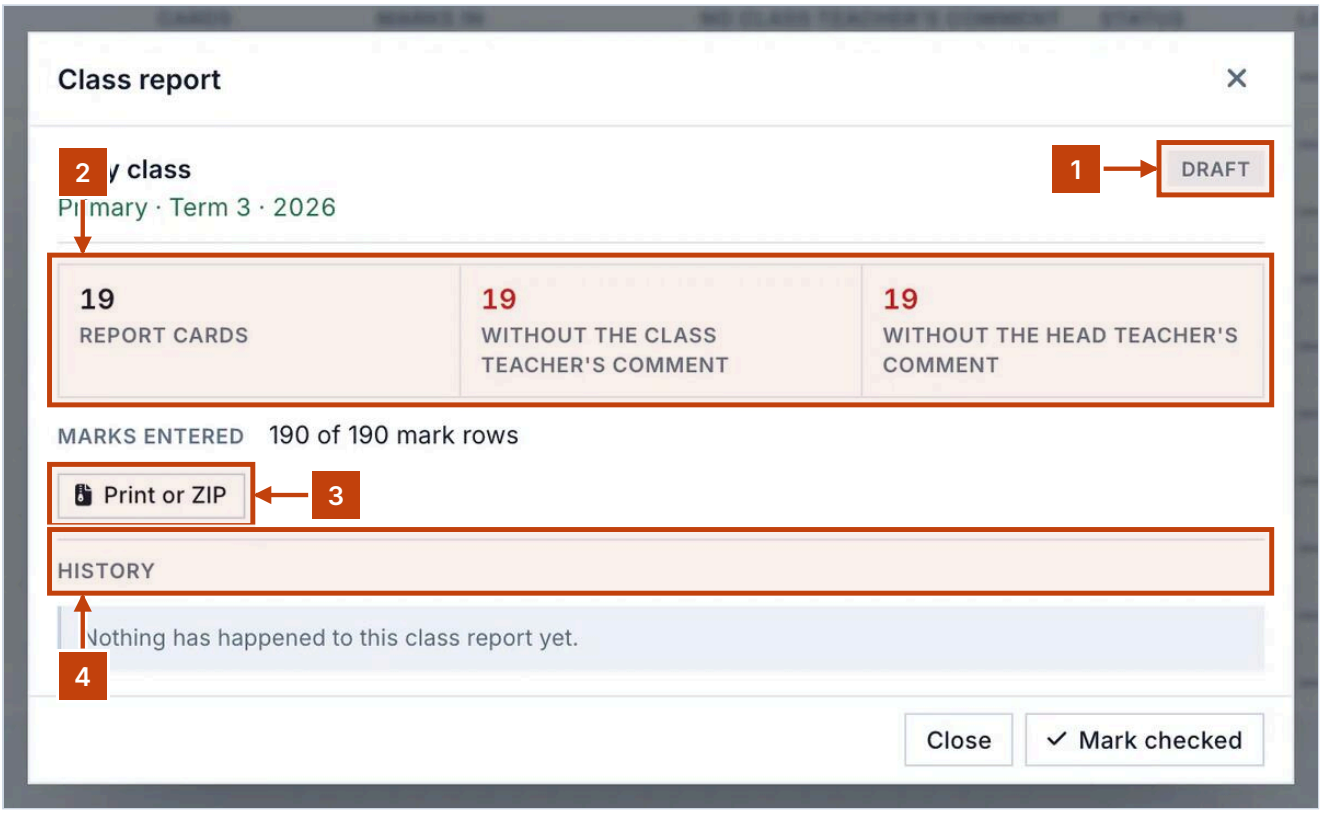
When a class is released:

- Parents can see its cards in the parents' app, on the parents' pages and through their links, unless the fees gate withholds a card (see What parents see).
- Its marks and comments cannot change on any screen or in the phone app. Making the cards again leaves the class as it is.
- A fresh parents' copy of each secular card is saved for the parents' app.

When a step is refused

You see	Why
There are no report cards for this class yet. Generate them first.	Make the cards.
... of this class's report cards are out of date: marks changed after they were made. Make them again first.	Make them again, then check.
The marks or comments changed after the class teacher checked them. It went back to draft: the class teacher checks it again.	Something changed after the check, in this app or the old one.
The class teacher checks the report cards before they are approved.	Approve comes after check.
Approve the report cards before releasing them.	Release comes after approve.
Only the DOS or head teacher approves and releases report cards.	Class teachers only check.

Open a class



The demo school · invented names and figures

1 The class's stage.

2 Cards, and how many still lack a comment.

3 Print the class, or a ZIP with one file per student.

4 Every step, who took it and when.

Click a class's name (or the eye) for its window: the stage 1, the number of cards and how many lack the class teacher's or head teacher's comment 2, the marks entered, and the dates it was checked, approved and released. **Print or ZIP** 3 opens the print window for this class (see Print report cards). **History** 4 lists every step with who took it and when.

The window's buttons are the steps you may take now, and **Reopen...**.

Reopen a class to correct it

Press **Reopen...** in the class's window, type **What needs correcting** (at least 5 characters), and press **Reopen for correction**. The class goes back to draft and the marks unlock. If it was released, parents stop seeing its cards, and the codes printed on them are marked as replaced: anyone who checks an old printed card is told a corrected card was issued.

The director of studies, head teacher, deputy and school administrator can reopen any class. The class teacher, or whoever checked it, can take back a check that is not yet approved.

Send the cards to parents

After release, open the class and press **Send to parents...**. The window shows, before anything is sent:

- **Messages**: how many parents get the *Report card ready* message, each with a private link to their own child's card.
- **Withheld for fees**: students who owe fees. Their parents are left out unless you tick *Tell the parents of withheld cards too*; they then see the fees message when they open the link.
- **Cost** and the wallet, and how many go by app notification, WhatsApp and SMS.
- Two sample messages.

Press **Send ... messages**. Pressing it again later sends nothing new to parents who already have their link; a class released again after a correction is announced again. The class's window then shows how many links were sent and opened. **Send to the parent** on a single card sends that card's link again.

> ⚠ CAREFUL
>
> Sending costs money from the school's message wallet. It is refused when the wallet is short, when the *Report card ready* message is switched off, or when it has no [LINK] in it: fix those under the messages settings (see Automatic messages).

Theology classes are released the same way, but nothing is sent from them: parents get the theology results inside the secular card.

Good to know

- Every step, with who took it and any reason, is kept in the class's history and the school's audit log.
- A parent's link works for 60 days. Each time it is opened it checks again that the class is still released and the fees are cleared.

QUESTIONS

Can I release one student's card on its own?
Not through this page: a class is released as a whole. After release, one card can still be held back with **Mark not ready** under **Print report cards › Parents & fees**.

We found a mistake after release. What do we do?
Open the class and press **Reopen...**, saying what needs correcting. Parents stop seeing the cards, the marks unlock, and the class goes back to draft. Correct, make the cards again, then check, approve and release again.

Why did my approval send the class back to draft?
Marks or comments changed after the class teacher checked the cards. The class teacher checks them again, then you approve.

Does releasing send text messages?
No. Releasing only lets parents see the cards. Messages go when you press **Send to parents...** and confirm.

Print report cards

Print a whole class or stream as one PDF, or a ZIP with a PDF per student, in the school's design. Print one card from the card itself.

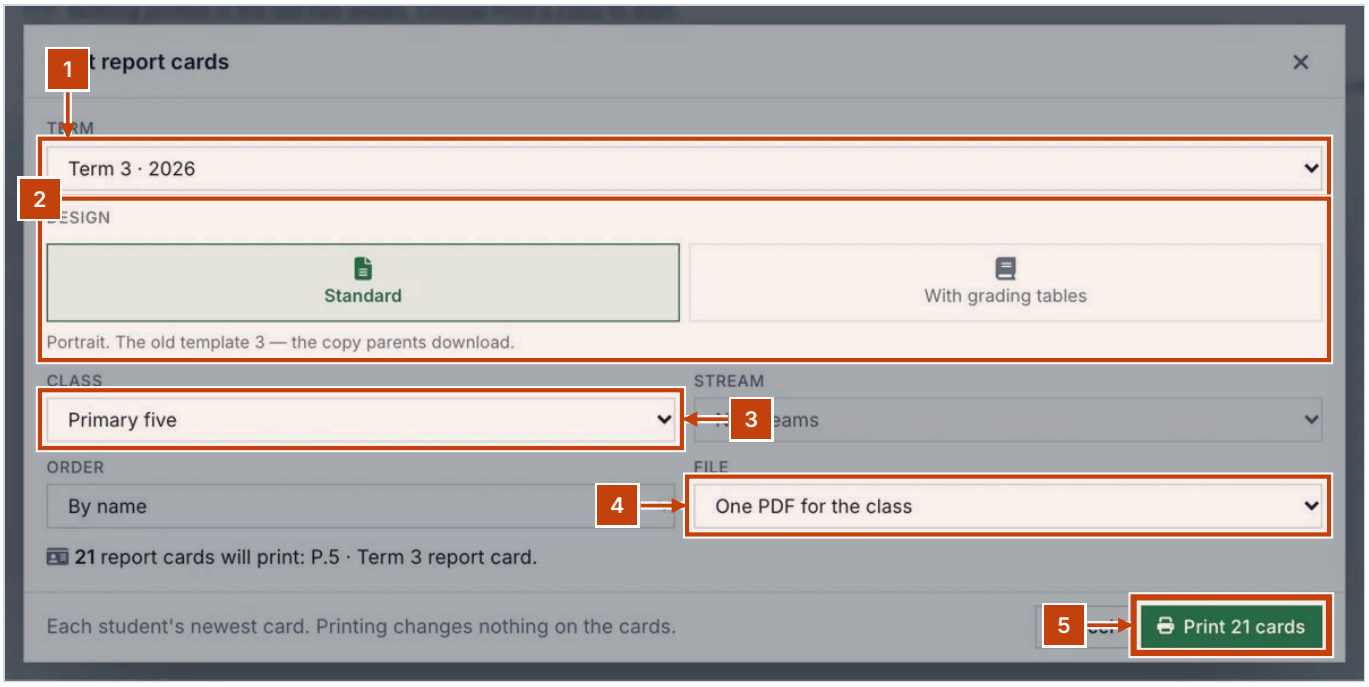
For: Director of studies, Head teacher, Teacher · app.schooldynamics.ug/help/reports/printing

Print a class at a time from **Marks & reports › Print report cards**. You get one PDF to print, or a ZIP file with one PDF per student (to email or share). Single cards print from the card itself.

Before you start

- The term's report cards are made (see Make the report cards).
- The director of studies, head teacher, deputy and school administrator print any class. A class teacher (or stream teacher) prints the term's cards of their own class, unless the term is closed to teachers.

Print a class



The demo school · invented names and figures

1. The term whose cards you print.
2. The design of the card.
3. The class, then a stream if you want one.
4. One PDF for the class, or a ZIP with one PDF per student.
5. Print. The button says how many cards.

1. Press **Print a class**. The *Print report cards* window opens.
2. Choose the **Term** 1. It starts on the term in the top bar.
3. Choose the **Design** 2 (see the table below).
4. Choose the **Class** 3. Keep **Whole class**, or choose one **Stream**.
5. Choose the **Order**: *By name* or *By position*.
6. Choose the **File** 4: *One PDF for the class* or *A ZIP file: one PDF per student*.
7. Check the line *... report cards will print*, then press **Print ... cards** 5.

A progress bar shows while the cards are drawn. You may close the window: the print carries on and appears under **Recent prints** when it is ready. When it is done, press **Download PDF** (or **Download ZIP**), or **Preview** to look at a PDF first. **Print another class** starts again.

If some cards are out of date, the window says how many before you print, with **Make them again**.

Designs

Design	What you get
Standard	Portrait. The card parents download.
With grading tables	Portrait, with the grading tables printed on it.

Schools with theology classes see four designs instead: *Secular and theology on one page* (the card parents download), *Secular only*, *Theology only* (choose a theology class) and *Secular and theology side by side* (landscape, marks and aggregates only).

When the school has saved a design under **Report cards › Design**, the window starts on it (see Card design).

For those who manage reports, **Report cards** at the top of the window also offers *New curriculum* and *Progressive tests* when the school has them. Those print in their own design, and *By position* is not offered for new-curriculum cards.

Recent prints

The **Print a class** tab lists the prints of the last two weeks: what was printed, the design and file kind, how many cards, by whom and when. Use the eye to preview a PDF, or the download icon. Prints are kept for two weeks. Class teachers see only their own prints.

Print one card

Open a student's card (from the report cards list, or **Parents & fees**) and press **Print**, or press the print icon on the list. The card opens in a window as it prints:

- **Design** changes the design of this one card.
- **PDF** or **Page view**: if the PDF does not show on your device, choose **Page view**.
- **New tab** and **Download**.

What is on a printed card

A printed card is drawn from what the cards and marks hold when you print; nothing is worked out again. It shows the student's class and stream, the class teacher and the head teacher, the student's LIN, SchoolPay code and photo when they are recorded, and the subjects that appear on reports, with a column for each exam the term counts. A score below 1 prints as "–". The term's settings decide the rest: the position (or a blank to write one in), the class teacher's comment (or a blank), the other comments, and the fees balance (*NIL BALANCE*, the amount, or a blank when the student's account is not shown to parents). The message at the bottom closes the card.

Every card also carries a **QR code**. Anyone can scan it to check the card is genuine: the check shows the school, the student's initials, the class, the term and the day it was issued, never the marks. If a released class is reopened and corrected, scanning an old printed card says a corrected card was issued.

When printing is refused

You see	Do this
There are no report cards to print for ... Generate them first.	Make the class's cards.
That is ... report cards; print up to 400 at a time (choose a stream).	Choose one stream.
You can print the report cards of your own class only.	Ask the director of studies to print other classes.
This print is already running. Wait for it to finish.	The same print is being drawn. Wait, then look under **Recent prints**.

Good to know

- Each print uses each student's newest card. Printing never changes a card.
- To give parents the cards on their phones, save the parents' copies instead (see What parents see).

QUESTIONS

Do I have to release the cards before printing?

No. You can print at any time, for example to check a class on paper before approving it. Printing changes nothing on the cards.

The print says there are too many cards.
A print takes up to 400 cards. Choose one stream at a time.

Can a class teacher print?
Yes: the term's report cards of their own class (or stream), unless the term is closed to teachers. They see only their own prints.

How do I print one student's card?
Open the card from the report cards list and press **Print**. The card opens as it prints, with **Download**.

Choose how report cards look

Pick the page, the style, the colour and whether the photo prints, with a live preview drawn on one of your own cards.

For: Director of studies, Head teacher · app.schooldynamics.ug/help/reports/card-design

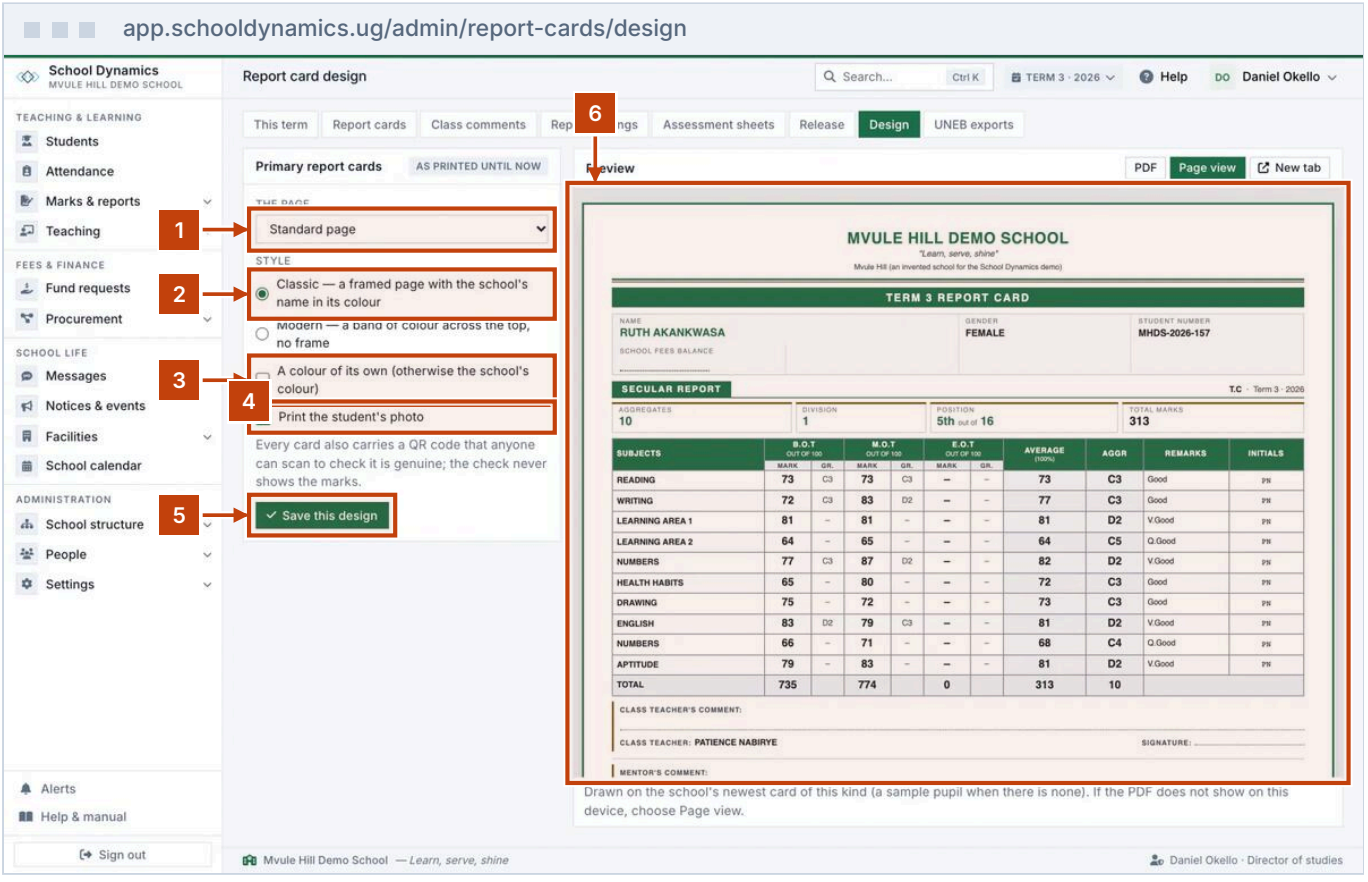
The **Design** tab decides how your school's report cards look when they are printed and when parents download them. You choose once; every card of that kind then prints the same way. A preview beside the choices shows the result on one of your own cards.

Open **Marks & reports › Report cards**, tab **Design**.

Before you start

- The director of studies, head teacher, deputy and school administrator can open this tab.
- Put the school's logo and colour in the school profile first (see School profile).

Choose the design



The demo school · invented names and figures

1. The page: standard, or with the grading tables.
2. The style: Classic or Modern.
3. A colour for the cards, or the school's colour.
4. Print the photo, or not.
5. Save: every card of this kind prints this way.
6. The preview, drawn on one of your cards.

1. If your school has more than one kind of card (primary, theology, new lower secondary, A-level), choose the kind at the top.
2. Choose **The page** 1 (primary cards only).
3. Choose the **Style** 2: *Classic* (a framed page with the school's name in its colour) or *Modern* (a band of colour across the top, no frame).
4. Tick **A colour of its own** 3 to choose a colour for the cards. Otherwise they use the school's colour. A colour that is too light is darkened so white writing reads on it.
5. Tick or untick **Print the student's photo** 4.
6. Look at the preview 6. Every change redraws it.
7. Press **Save this design** 5.

Design saved. Every primary report card prints this way now. Until a design is saved, the card says *As printed until now*.

The page for primary cards

The page	What you get
Standard page	Portrait: the card parents download.
With the grading tables	Portrait, with the grading tables printed on it.

Schools with theology classes see *Secular and theology on one page*, *Secular only, with the grading tables* and *Secular and theology side by side (landscape)*.

The preview

The preview is drawn on the school's newest card of that kind, or on a sample pupil when there is none. If the PDF does not show on your device, press **Page view**. **New tab** opens the preview on its own.

Good to know

- Every card carries a QR code that anyone can scan to check it is genuine. The check never shows the marks.
- The print window starts on the saved design, and you can still choose another design for one print (see Print report cards).
- The parents' copies saved from now on use the saved primary design (see What parents see).

QUESTIONS

Does a new design change cards already printed?

No. It changes how cards print from now on, and the parents' copies saved from now on. Cards already printed or saved stay as they were.

Where does the logo come from?
From the school profile. The colour is the school's colour unless you give the cards a colour of their own.

What parents see, and when

When a report card reaches parents, why one may be held back for fees, and how to hold back or show a single card and save the copies for the parents' app.

For: Director of studies, Head teacher, Bursar · app.schooldynamics.ug/help/reports/what-parents-see

Parents see a report card in the parents' app, on the parents' pages and through the link sent to them. Two things decide whether they can: the card must be **ready for parents**, and the student's **fees must be cleared**. This lesson explains both, and the page where you can see them for every card: **Marks & reports › Print report cards**, tab **Parents & fees**.

Before you start

- Anyone who reads report cards can open the **Parents & fees** page. Only the director of studies, head teacher, deputy and school administrator can mark cards ready or not, and save copies.
- The rules below are for secular (primary) cards. Theology and new-curriculum cards are covered at the end of the next section.

When a card reaches parents

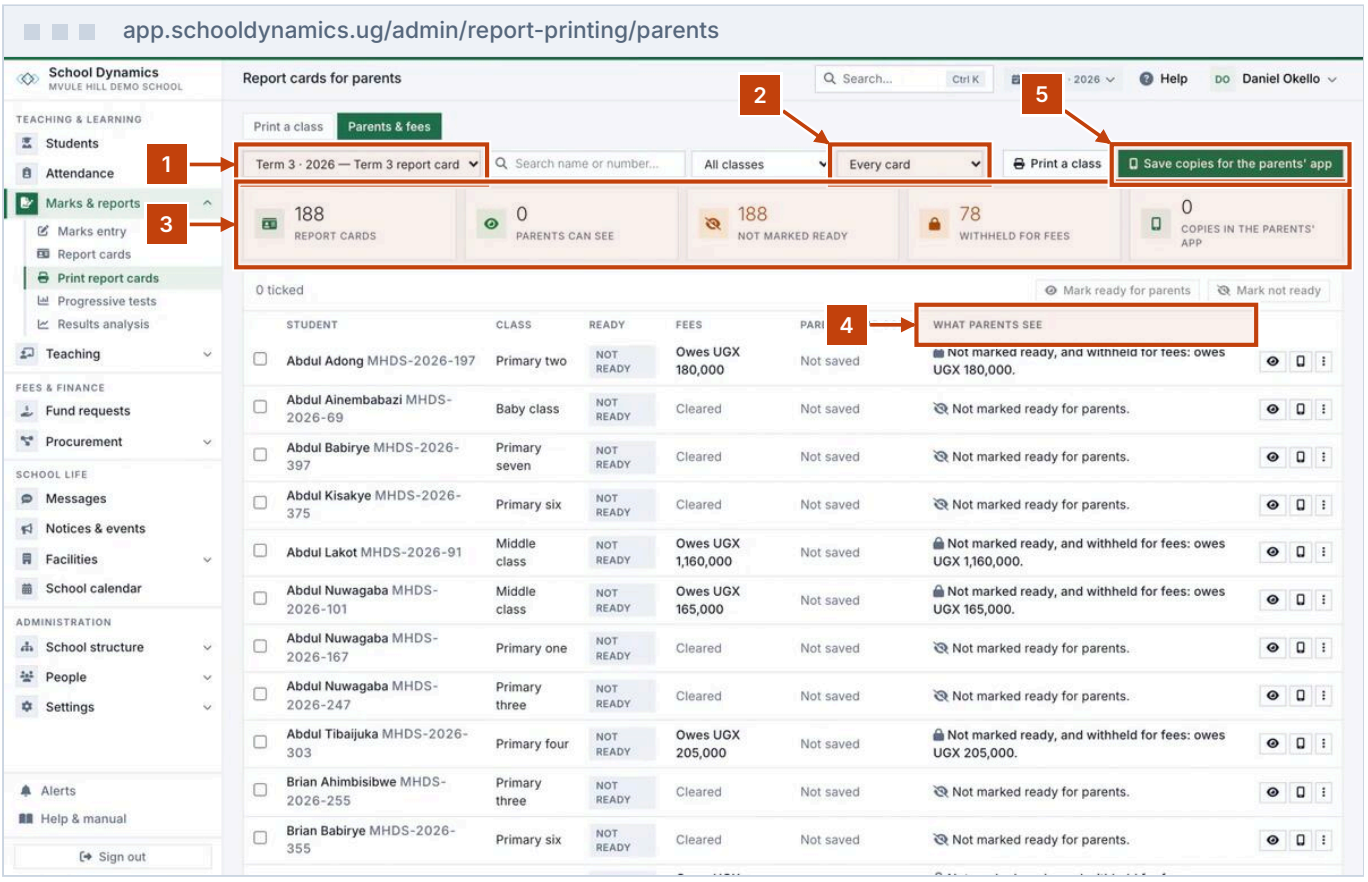
Ready for parents. A secular card becomes ready when its class is released (see Check, approve and release). Reopening the class makes its cards not ready again. A class that has never entered the release steps can also be marked ready card by card on this page.

Fees cleared. The fees gate withholds a card while the student owes fees: a fees balance below zero. A balance of zero, or in credit, clears it. A withheld card is listed for the parent, with no results and this message: *Report card is locked. Outstanding school fees of UGX … must be cleared before the report card for … can be viewed. Please contact the school bursar.*

Ready?	Fees	The parent sees
Not ready	any	Nothing
Ready	Cleared	The card
Ready	Owes	The card listed, locked, with the fees message

Theology results reach parents inside the secular card. New-curriculum cards reach parents through the links sent after their class is released, and the link applies the same fees gate.

The Parents & fees page



The demo school · invented names and figures

1 The term's report.

2 Show the cards parents can see, those not ready, withheld for fees or with no app copy.

3 How many cards parents can see, and why the others are held back.

4 For each card, what parents see and why.

5 Save fresh copies for the parents' app.

Choose the term's report 1, then search, choose a class or stream, or show only some cards 2: *Parents can see it*, *Not marked ready*, *Withheld for fees* or *No copy for the app*. The figures 3 count the cards, those parents can see, those not marked ready, those withheld for fees and the copies saved for the app.

Each line shows the card's **Ready** state, the student's **Fees** (*Owes UGX …*, *Cleared* or *In credit*), whether the **Parents' app copy** is saved, and **What parents see** 4, in words: *Parents can see it.*, *Withheld for fees: owes UGX …*, *Not marked ready for parents.* Hover over an amount to read the message the parent gets.

Each row's menu has **Why it shows or not**, **Preview the report card** and **See the parents' copy**.

Hold back or show one card

The director of studies, head teacher, deputy and school administrator can tick cards and press **Mark ready for parents** or **Mark not ready**, or use the same words in a card's row menu.

- **Mark not ready** works on any card, even in a released class: use it to hold back one card while you look into it. In a class that never entered the release steps, this also unlocks the student's marks. In a

released class, the marks stay locked until the class is reopened.

- **Mark ready for parents** is refused for a class in the release steps (checked, approved, or reopened): *... report is in the release steps ...: parents get its cards when the class is released under Report cards › Release.* Release the class instead.

Save the copies for the parents' app

The parents' app opens a saved PDF of each card, the parents' copy. Releasing a class saves fresh copies of its cards by itself. To save them yourself, for example after changing a design:

1. Choose the term, and a class if you want only one.
2. Press **Save copies for the parents' app** 5.
3. Confirm. The confirmation says how many cards, and what *ready for parents* will be set to.

A progress bar shows while the copies are saved. One card's copy can be saved from its row (the phone icon), or from its preview with **Save copy for the parents' app**.

> ⚠ CAREFUL
>
> For a class that has never entered the release steps, saving copies sets each card's *ready for parents* from the term's **Parents may see reports** setting, replacing any change made by hand. A class in the release steps keeps what its release says.

Good to know

- The page's own note warns that today's parents' app applies the fees rule but also lists cards not marked ready, without the *Published* badge. The parents' pages list only cards that are ready.
- A link sent to a parent checks everything again each time it is opened: the class must still be released, the card ready, and the fees cleared.
- For what a parent does on their side, see Report cards for parents.

QUESTIONS

A parent says the card is locked. Why?
The student owes fees. The parent reads *Report card is locked. Outstanding school fees of UGX ... must be cleared before the report card for ... can be viewed. Please contact the school bursar.* Once the balance is zero or in credit, the card opens.

Do staff need fees cleared to see a card?
No. The fees gate applies to parents only. Staff always see every card.

Can I show one card to a parent whose child owes fees?
Not in the app or on the parents' pages: the fees gate decides. The card can still be printed and handed over.

Competency reports (new lower secondary curriculum)

Set up a term's new-curriculum report, enter unit, project and exam scores, set the descriptors and grades, and make the cards.

For: Director of studies, Teacher, Head teacher · Secondary · app.schooldynamics.ug/help/reports/competency-reports

Schools teaching the new lower secondary curriculum (S.1 to S.4) report each subject by units, a project and an exam, with a descriptor for the learner's level. These reports have their own pages under **Marks & reports › Competency reports**. The menu entry shows for secondary schools.

The pages are tabs: **Overview**, **Marks entry**, **Report cards**, **Settings and generation** and **Descriptors and grades**. Teachers see only the tabs they can use.

Before you start

- The term must be the school's active term to set it up.
- The classes of the year must have new-curriculum subjects, with each subject's teachers set.
- The director of studies, head teacher, deputy and school administrator set up the term, change the settings, make the cards and set the descriptors. Teachers enter scores for the subjects they teach.

> **GOOD TO KNOW**
>
> The demo school is a primary school, so it has no competency reports to try.

Set up the term

On **Overview**, press **Set up ...** (the button names the active term) and confirm. The term gets its own settings, ready to change:

- the title *Term ... - Termly Report Card*;
- units 1 to 3 on the report and open for entry, units 4 and 5 off;
- the project closed and the exam open;
- maximum scores of 3 for each unit, 10 for the project and 80 for the exam;
- the fees balance shown, and parents not yet allowed to see the report.

The **Overview** then shows the term, how many students have marks, how many scores are in for each part, and a table of scores entered by class and subject. Choose another term in the list at the top to look back.

The settings

Open **Settings and generation**. In **Settings**:

- **Report title**.
- A table of the parts: **Unit 1** to **Unit 5**, **Project** and **Exam**, each with its **Maximum score**, **Teachers may enter it** (Yes or No) and, for units, **Shown on the report**. The project and exam always show.
- Two switches: **Add the project score into the units total (out of 10)** and **Add the exam score into the units total (out of 10)**. With either on, the page warns that *out of 10* can go far past 10. Leave them off for *out of 10* to come from the units alone. Some schools see one switch instead, **Show the project on report cards**: their marks never add the project or the exam into the units total.
- **Show the fees balance on the report**, **Parents may see the report**, **Report template** (Template 1, 2 or 3), **General communication** and **Message at the bottom of the report**.

Press **Save settings**. *Settings saved. Nothing was generated.* A maximum is above 0, at most 999.9, with at most one decimal place.

> ⚠ CAREFUL
>
> **Parents may see the report** set to Yes also locks the term's marks: nobody can change them. Set it back to No to correct a mark.

Make the mark rows and the cards

In **Generate**, tick the **Classes**, then:

- **Check what is missing** says how many mark rows and report cards would be made.
- **Create mark rows** gives each active student a row for the class's compulsory subjects and the optional subjects they chose.
- **Recalculate marks** works out every mark row again with the settings and bands as they are now.
- **Create report cards** makes a card for each student who has none.

Each adds only what is missing and never removes anything. A progress bar shows while it runs, and *Last action* says what was done. Classes already released to parents are left out.

Enter scores

Open **Marks entry**, then choose the class, stream (if any) and subject. Type each score; it saves when you leave the box. `Enter` and the arrow keys move up and down. **Open the marks grid** opens the spreadsheet grid, which also works on a phone. **Excel** and **CSV** download the scores.

- A blank or 0 means not entered. A score may have one decimal place (2.5).
- A score cannot be above its part's maximum, and a closed part cannot be changed.
- Each line shows **Out of 10**, **Descriptor**, **Out of 20**, **Overall** and **Grade**.

How a line is worked out, with both switches off:

Figure	Is
Out of 10	The units entered, added, divided by their maximums added, times 10
Descriptor	The first descriptor whose range holds the units entered, added
Out of 20	The project plus out of 10
Overall	The exam plus out of 20
Grade	The first grade whose range holds the overall score; with none, the descriptor

Descriptors and grades

The **Descriptors and grades** tab holds the school's ranges.

- **Add descriptor**: **Lowest units total**, **Highest units total**, the **Descriptor** (for example *Basic*, *Moderate*, *Outstanding*), an **Identifier** (a whole number) and its **Meaning**, printed in the card's descriptor table.
- **Add grade**: **Lowest overall score**, **Highest overall score** and the **Grade**.

A mark gets the first range, in the order they were added, that holds its score. Where two ranges overlap, the page warns which one is used. Changing a range does not change marks already entered: press **Recalculate marks** for the term.

The report cards

Report cards lists the term's cards, with a search and a class filter. A warning says when students have marks but no card. Click a student for the card: name, LIN, class and term, each subject's units, out of 10, descriptor, project, out of 20, exam, total score, grade and teacher, then the descriptor table and the comments.

Write the **Class teacher's comment** and the **Head teacher's comment** with the pen beside each, then **Save comment**. The comment helpers (comment bank, behaviour sentences, AI draft when switched on) work as on other cards (see Comments). The head teacher's comment is for those who manage reports; the class teacher's for the class (or stream) teacher too.

Print one card with **Print**, or a class from **Print report cards** with *New curriculum* chosen (see Print report cards). Classes are checked, approved, released and sent to parents on the **Release** page, under *New curriculum* (see Check, approve and release).

Good to know

- Every score saved is kept in the school's audit log.
- Released classes, and terms whose report parents may see, lock their scores. The director of studies or head teacher can still correct a closed term's scores.

QUESTIONS

Why do I not see Competency reports in the menu?
It shows only for secondary schools. A primary school uses Report cards instead.

I changed the maximum scores. Why did the marks not change?
Saving the settings changes the settings only. Press **Recalculate marks** under **Settings and generation** to apply the new maximums and bands to marks already entered.

Why can I not lower a maximum?
Some scores are already above the new maximum. The page says how many. Correct those scores first.

A teacher cannot enter marks. Why?
They see only the new-curriculum subjects they teach. Add them as a teacher of the subject. The part they are entering must also be open (**Teachers may enter it** set to Yes).

Progressive tests

Run up to ten tests per subject in a term, with their own marks, reports, positions, class analysis sheets and PDF cards.

For: Director of studies, Teacher, Head teacher · app.schooldynamics.ug/help/reports/progressive-tests

Progressive tests are short tests through the term: up to ten (T1 to T10) for each subject, with their own marks, reports, positions and analysis, separate from the term's report card. Each term can have one set. Open **Marks & reports › Progressive tests**.

Before you start

- The director of studies, head teacher, deputy and school administrator create the tests and work out the results. Teachers enter marks for the subjects they teach. Everyone who reads academics can see the tests, reports and results.
- The school needs a grading scale with grades (see Grading scales).

> **GOOD TO KNOW**
>
> The demo school has no progressive tests yet, so this lesson has no pictures.

Create a term's tests

1. Press **New term's tests**.
2. Choose the **Term**. A term has one set of tests.
3. Type a **Title**, or leave it blank for *Progressive Assessment* – and the term.
4. Choose the **Grading scale** and the **Number of tests** (1 to 10).
5. Tick the **Classes**.
6. Under **Leave out subjects**, tick any subject that should have no marks or reports.
7. Choose **Marks entry**: *Open* or *Closed*. With *Open*, tick the **Tests open for entry** (none ticked: every test is open).
8. Choose **Rank students by** (*Whole class* or *Each stream*), whether **Parents can see the reports**, and whether **Positions on report cards** show.
9. Write the **Class teacher's comment on report cards**, the **Head teacher's message** and the **Footer** if you want them.
10. Press **Create**. *Progressive tests created. Next, create the mark lists.*

Settings on the tests' page reopens the same form; the term cannot change once the tests exist.

Work out results

The tests' **Overview** has a **Work out results** card. Each step runs only when you press it, in this order:

Step	Button	Does
1. Create mark lists	**Create**	A row for every active student and subject of the chosen classes that has none. Marks entered are kept.
2. Work out reports	**Work out**	Each subject's average of the tests above 0, its grade and remark; each student's total marks, aggregates and division.
3. Work out positions	**Rank**	Ranks students by total marks in each class or stream; equal totals share a place.
4. Write comments	**Write**	A comment from the comment bank for each report, by aggregates. It replaces comments written by hand.
Remove students who left	**Remove**	Deletes the mark rows of students no longer active, with their marks.
Remove left-out subjects	**Remove**	Deletes the mark rows and report lines of subjects left out in the settings.
Copies for the parents' app	**Save copies**	Saves each report as a PDF for the parents' app. Run it again after marks or comments change.

> ⚠ CAREFUL
>
> The two **Remove** steps delete marks, and cannot be undone. Read the number in the confirmation first.

Below the card, **Marks entered** shows each class and subject with how many marks are in for each test. **Open entry** and **Close entry** open or close marks entry for everyone.

Enter progressive marks

Open the **Marks entry** tab (or the marks icon on the list). Choose the class, stream, subject and test (**Every test**, or one). Type each mark: a whole number from 0 to 100, saved as you leave the box. **Open the marks grid** opens the spreadsheet grid, which works on a phone; **Export** downloads the marks.

The **Avg**, **Grade** and **Remarks** columns are a preview. The reports change only when the director of studies runs **Work out reports** again.

Teachers enter only the subjects they teach. Marks cannot be entered while entry is closed, for a closed test, or for a student whose report parents can already see.

Reports, results and sheets

- **Reports**: one line per student with total marks, aggregates, grade, position (*3rd / 41*), the class teacher's comment and whether parents can see it. Filter by class, stream or grade. Click a student to read the report; those who manage reports can change both comments and tick **Parents can see this report**, then **Save report**. **Report cards (PDF)** prints a chosen class's cards, in order of position.
- **Results**: each class's students, average marks, average aggregates, divisions and the top and bottom five; then each subject's average, highest and lowest.
- **Assessment sheets**: an analysis of one class or stream, test by test and subject by subject, with the most improved students and those needing attention. **Prepare every class** makes a sheet for each class that has none and brings all of them up to date; **New sheet** makes one for a class or a stream. Each sheet prints as a PDF with **Analysis sheet (PDF)**.

A class's progressive cards also print from **Print report cards** with *Progressive tests* chosen (see Print report cards).

How the results are worked out

- **A subject's average**: the tests with a mark above 0, averaged and rounded. A 0 is kept but not counted.
- **Grade**: from the tests' grading scale. **Remark**: below 39 *Improve*, below 49 *Fair*, below 59 *F.Good*, below 69 *Q.Good*, below 79 *Good*, below 90 *V.Good*, otherwise *Excellent*.
- **Total marks** and **aggregates**: the graded subjects added up.
- **Division**: below 4 aggregates X, up to 12 Division 1, up to 24 Division 2, up to 29 Division 3, up to 35 Division 4, otherwise U.

Good to know

- Every mark saved is kept in the school's audit log.
- Positions do not change when you work out reports again: run **Rank** after **Work out**.
- Progressive tests have their own *parents can see* switch on each report. They are not part of the release page.

QUESTIONS

Are progressive tests part of the term's report card?
No. They have their own marks, reports and cards. The term's report card uses the beginning, middle and end of term exams.

Why did saving the settings not change the reports?
Saving never works anything out. Run the steps under **Work out results**, in order.

Can parents see progressive reports?
Yes, when the settings allow it and the report itself is marked *Parents can see this report*. While parents can see a report, its marks are locked.

A teacher clicked Marks entry and got an error.
Only staff who enter marks can open the marks pages. A secretary can read the tests, reports and results, but not the marks.

Analyse results

See how subjects, classes, teachers and students did this term against last term, who to watch, and each class's division and grade counts.

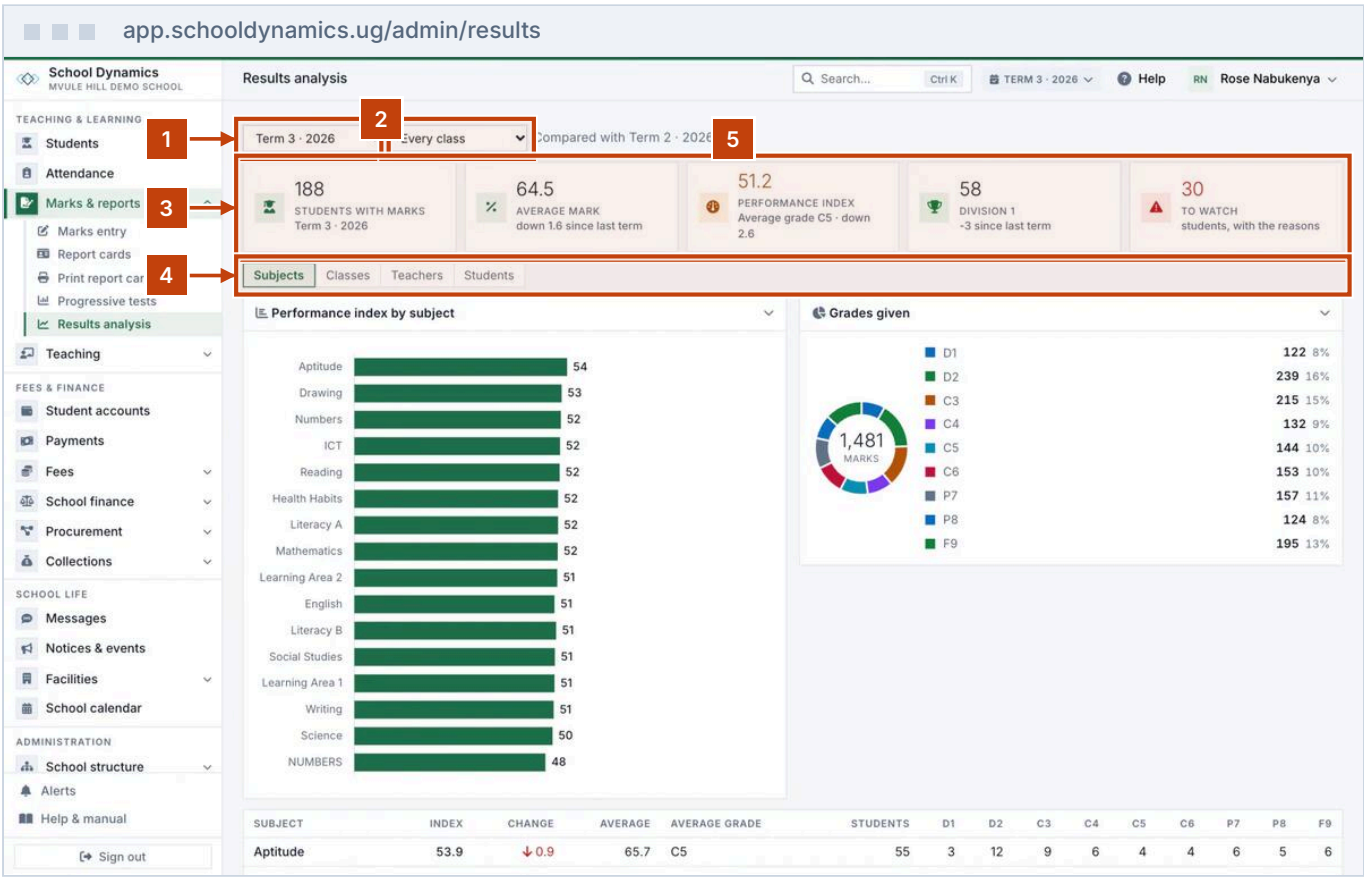
For: Head teacher, Director of studies · app.schooldynamics.ug/help/reports/results-analysis

Results analysis turns a term's report cards into a picture of the school: which subjects and classes did best, how each teacher's subjects did, which students did best and which to watch, all compared with the term before. Open **Marks & reports › Results analysis**. For one class's division and grade counts on a page to print, use an assessment sheet (below).

Before you start

- The head teacher, deputy, director of studies and school administrator can open it.
- It reads the report cards as last made, for students who are active now. Make the cards first (see Make the report cards).

Read the page



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1. The term. It is compared with the term before.
2. The whole school, or one class.
3. Students with marks, average, performance index, Division 1 and who to watch.
4. By subject, class, teacher or student.
5. How each figure is worked out.

Choose the term 1. It starts on the school's active term (not the term in the top bar), and is compared with the term before it. Choose a class 2 to narrow everything to it; **Whole school** goes back.

The figures 3:

Figure	Means
Students with marks	Students with at least one mark this term.
Average mark	The average of every subject mark, out of 100, and its change since last term.
Performance index	100 when every mark is the best grade, 0 when every mark is the worst. It shows the average grade too. For new-curriculum classes, it is the average score.
Division 1	Students in Division 1 on their report cards.
To watch	Students who meet one of the rules below. Click it for the list.

Show the results by 4 :

- **Subjects**: a chart of each subject's performance index, a chart of the grades given, and a table with each subject's index, average, average grade, students and the count of each grade.
- **Classes**: a chart of divisions and a chart of each class's average, then each class and stream with its index, average, change and divisions. Click a class to narrow the page to it. For upper primary classes that sit the four PLE subjects, a card **Divisions by the PLE rule** shows the divisions the official bands would give (4–12 Division 1, 13–23 Division 2, 24–29 Division 3, 30–34 Division 4, 35–36 ungraded).
- **Teachers**: each teacher's index, average, number of marks and the subjects and classes they teach.
- **Students**: **Best results** (the top ten by average) and **To watch**, with the reason for each student. Click a student to open their report card.

The info button 5 explains every figure.

Who is on the To watch list

A primary student is listed when any of these is true:

- Division U, or no division (X) because a subject has no marks;
- two or more counted subjects at the worst grade;
- aggregates up by 5 or more since last term.

For new-curriculum classes: two or more subjects below 40, or an average down by 10 or more since last term. Without a class chosen, the list shows the first 25, most reasons first.

Assessment sheets

An assessment sheet counts, for one class or stream and one term, how many students got each division and how many marks got each grade (D1 to F9, and X) in each subject, with the class teacher's name.

Open **Marks & reports › Report cards**, tab **Assessment sheets**. The list shows each sheet's term, title, kind, class, students and Division 1 to 4 counts. Click one for a quick view, or open its page.

To make one (the director of studies, head teacher, deputy or school administrator):

1. Press **New assessment sheet**.
2. Choose the **Report** (the term's report settings).
3. Schools with theology choose **Marks**: *Secular* or *Theology*.
4. Choose **For**: *A whole class* or *One stream*, then the class or stream.
5. Press **Make the sheet**. *Assessment sheet made.*

A sheet counts what the cards and marks say when it is made. After the cards are made again, press **Count again** on the sheet. **Print** opens it as a PDF.

The grades are counted by aggregates 1 to 9, as the old sheet did; X is a mark worth 0 aggregates. U and X divisions are counted together.

Good to know

- Nothing on these pages can be changed. They read the report cards.
- Progressive tests have their own results and sheets (see Progressive tests).

QUESTIONS

Why are this term's figures empty?
The page reads the report cards as last made. Make the cards first; until then it says *No marks yet*.

Can teachers see this page?
No. It compares teachers and classes, so only the head teacher, deputy, director of studies and school administrator see it.

Why do the divisions here differ from the PLE rule card?
Report cards use the bands School Dynamics has always used. The **Divisions by the PLE rule** card shows what the official bands would give for the same students.

UNEB candidate lists and results files

Download a candidate list and photos for PLE, UCE or UACE registration, and a term's results as a spreadsheet for the district or a foundation body.

For: Director of studies, Head teacher · app.schooldynamics.ug/help/reports/uneb-exports

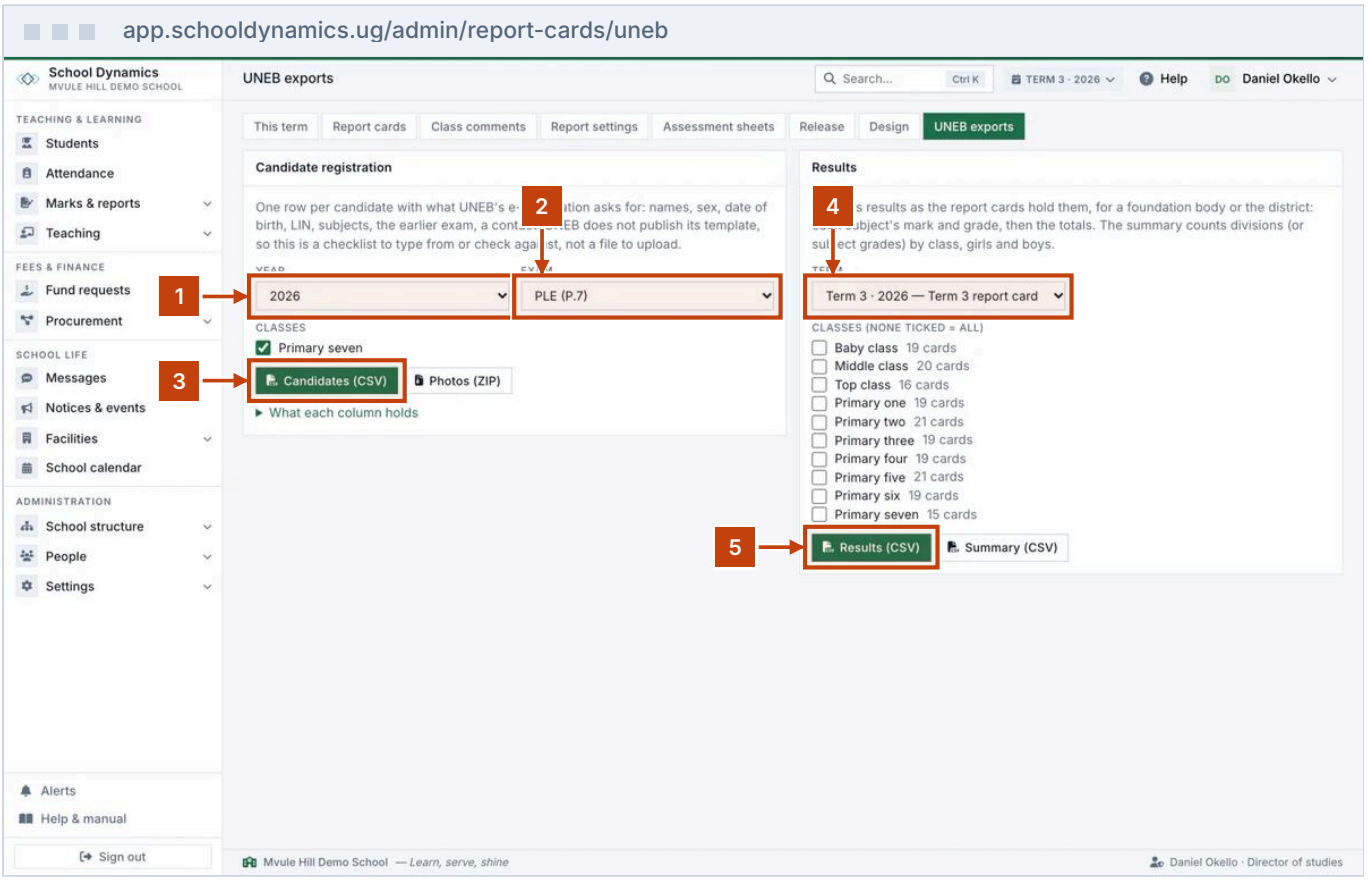
The **UNEB exports** tab gives you two kinds of file: a list of exam candidates with what UNEB's registration asks for, and a term's results as a spreadsheet for the district, a foundation body or your own records. Both are CSV files that open in Excel or Google Sheets.

Open **Marks & reports › Report cards**, tab **UNEB exports**.

Before you start

- The director of studies, head teacher, deputy and school administrator see this tab.
- For the candidate list, the year needs a candidate class: P.7 for PLE, S.4 for UCE, S.6 for UACE.
- For results, the term's report cards must be made.

The candidate list



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1 The year of the candidates.

2 The exam: PLE, UCE or UACE, by the candidate class.

3 One row per candidate, for registration.

4 The term whose results you want.

5 Every student's marks and grades, and a summary.

1. Choose the **Year** 1.
2. Choose the **Exam** 2. Only exams whose candidate class exists that year are offered.
3. Tick the **Classes** (all are ticked to start with).
4. Press **Candidates (CSV)** 3 for the list, and **Photos (ZIP)** for the photos.

The list has one row per active student of the chosen classes, by name: number, surname and other names in capitals, sex (M or F), date of birth (DD/MM/YYYY), LIN, NIN, nationality, class, stream, subjects and subject codes, the previous exam (PLE for UCE, UCE for UACE), the parent or guardian with the relation and a telephone, the photo's file name and the school number. **What each column holds** on the page lists every column and where it comes from.

The photos ZIP names each photo to match the *Photo file* column, for example *001 SURNAME OTHERS.jpg*.

The results files

Under **Results**:

1. Schools with new-curriculum cards too choose **Report cards**: *Primary* or *New curriculum*.
2. Choose the **Term** 4. It starts on the term in the top bar.
3. Tick classes under **Classes (none ticked = all)**. Each shows how many cards it has.
4. Press **Results (CSV)** 5 or **Summary (CSV)**.

Results (CSV) has one row per student: number, name, LIN, sex, class and school number, then each subject's mark and grade, then the total marks, aggregates, division, position and class size (for new-curriculum cards: the average score and the number of subjects).

Summary (CSV) counts, for each class, the students in each division by girls and boys (for new-curriculum cards, the subject grades).

Good to know

- The files hold what the report cards hold when you download them. Make the cards again first if marks changed.
- A subject a primary student did not sit shows as 0 in the results file.
- Every download is written in the school's audit log.

QUESTIONS

Can I upload the candidates file to UNEB?
No. UNEB does not publish its template, so the file is a checklist to type from or to check against, not a file to upload.

Why are some columns empty?
The file fills only what the school has recorded: a student without a LIN, a photo or a parent's phone number has those cells blank. Previous index number, special needs and funding are always left for you to fill in.

I pressed Photos (ZIP) and got a page that was not found.
None of the chosen candidates has a photo on record. Add the students' photos first.

Old results (2022–23)

Read the report cards and exam marks kept from the old app's first marks system, by term, class or student. They are shown as printed and never change.

For: Director of studies, Head teacher, Secretary · app.schooldynamics.ug/help/reports/old-results

Some schools used the old app's first marks system in 2022 and 2023, before today's report cards. Their report cards and exam marks are kept, read-only, under **Marks & reports › Old results**. The menu entry shows only in those schools.

Every page says: *Kept as the old app's first marks system left them (2022–23). These results are read-only.*

Before you start

- Anyone who reads academics can open these pages: the director of studies, head teacher, deputy, school administrator, teachers and the secretary.
- Nothing here can be changed or deleted.

> **GOOD TO KNOW**
>
> The demo school never used the old marks system, so it has no old results to show.

Find a student's old results

On **Overview**, type in **Find a student's old results…**. Students who have left are found too. Choosing one opens a window with how many old report cards, theology report cards and theology exam marks they have, and **All old results**, which opens the student's page: every old card with its marks, aggregates, division and position, and every theology exam mark.

Overview

Four figures, each a link when it is above zero: **Old report cards**, **Old theology report cards**, **Theology exam marks** and **Exams set** (B.O.T, M.O.T and E.O.T).

- **Report cards by term** lists each old report with its term, how many cards and when they were made. Click a report to list its cards.
- **Theology exams** lists each theology exam with its marks and how many were submitted.
- **What was not kept, and why** explains what the old system had that is not shown: its exam mark sheets (no marks were kept in them), nursery report cards (never used), the first competency report cards (test entries only) and their comment lists.

Old report cards

The **Report cards** tab lists the old cards. Switch between **Primary** and **Theology** when the school has both, search by name, number or SchoolPay code, and choose a report and a class. Sort by total marks,

aggregates or position.

Click the eye on a line to read the card in a window: the student's details, the secular half and the theology half of the same term. **Full card** opens it on its own page, with the subjects, each exam's mark, the total, aggregates, remarks and the teacher's initials, then the division, position and comments. **Scales printed on these cards** shows the grading and division tables the old cards used.

Old exams and theology mark sheets

The **Exams and marks** tab lists:

- **Theology exams**: each exam with its kind (beginning, middle or end of term), term, maximum, classes, marks, how many were submitted and how many are missing. The list icon opens the exam's mark sheet: every mark, by student, class and subject, with filters for **Submitted** and **Missing**, and a summary by subject and class (averages of the submitted marks).
- **Exams set**: the old beginning, middle and end of term exams. No marks were kept against them; their results are on the old report cards of the same term.

QUESTIONS

Why is Old results not in my menu?
It shows only in schools that used the old app's first marks system in 2022–23. Every other school's results are under Report cards.

Can I correct an old card?
No. Old results are a record of what was printed. They are shown, never changed.

Can I print an old card?
These pages have no print button. They are for reading and looking things up.

06

Teaching

Timetables, exam timetables, schemes of work, lesson plans, assignments, resources and the question bank.

The tools for planning and teaching: the timetable and exam timetable, schemes of work and lesson plans (and how they are checked), assignments, shared learning resources and the question bank.

The weekly timetable	6 min
Generate a timetable	5 min
The exam timetable and invigilators	3 min
Schemes of work	4 min
Lesson plans	4 min
Assignments and homework	4 min
Learning resources	2 min
The question bank	2 min
Teacher workload	2 min

The weekly timetable

Each class's, teacher's and room's week of lessons. Add and move lessons with clash checks, see each teacher's load, and print.

For: Director of studies, Teacher, Head teacher · app.schooldynamics.ug/help/teaching/timetable

The timetable is the school's week of lessons: which class has which subject, with which teacher, in which room, and when. You can look at it a class at a time, a teacher at a time or a room at a time, and print any of them. The director of studies builds it here, lesson by lesson, or with the generator.

Open it from **Teaching › Timetable**.

Before you start

- Everyone who can see the Teaching menu can look at the timetable: the head teacher, deputy, director of studies, teachers, the secretary and the school administrator. A teacher with lessons on the timetable opens on their own week.
- Only the director of studies and the school administrator can add, change, move or remove lessons, and look after the rooms.
- The year's classes and their subjects must exist. See Classes and streams and Subjects.

Reading the timetable

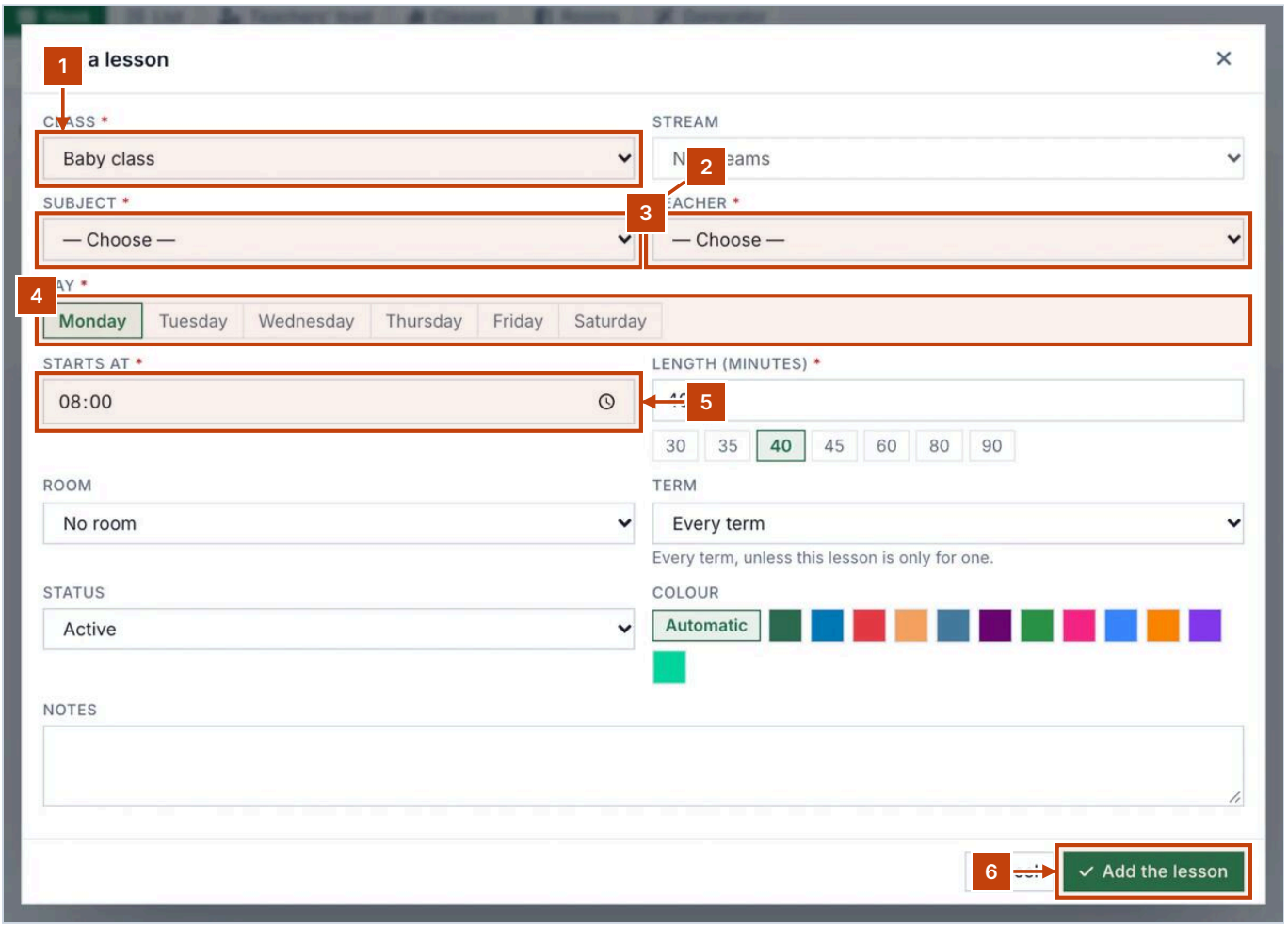
The page has four tabs: **Week**, **List**, **Teachers' load** and **Classes**. Those who build the timetable also see **Rooms** and **Generator** beside them.

Above the week, choose:

- the **year**, and the **term** (*Every term* shows all of the year's lessons);
- whose week to show: **Class**, **Teacher** or **Room**, then the class (and stream), the teacher or the room.

The **Week** tab is a grid, Monday to Friday, with Saturday added when any lesson falls on a Saturday. Each lesson shows its subject, its times, and the teacher and room. Its title line says how many lessons and hours a week are shown. A lesson with a dashed edge is a *draft* lesson. A lesson marked with a warning sign clashes with another (see below). The **List** tab shows the same lessons as a table, with their term and status.

Adding a lesson



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1. The class. For one stream only, choose the stream beside it.
2. One of the class's subjects.
3. Who teaches it.
4. The day, Monday to Saturday.
5. The time it starts. Set its length beside it.
6. Saves the lesson, unless it clashes.

1. Choose the class, teacher or room whose week you are filling.
2. Press **Add a lesson**. To fill a gap in the week, press the **+** in the empty slot instead: its day and time are filled in for you.
3. Choose the class 1, and the stream if the lesson is for one stream only. Then choose the subject 2 and the teacher 3.
4. Choose the day 4 and the start time 5. Once the school has lessons (or a school day set in the generator), the usual start times show as buttons under the time. Set the length in minutes, or press one of the lengths offered.
5. Choose a room if the lesson needs one. Leave **Term** as *Every term* unless the lesson belongs to one term only.
6. Read the box at the bottom. Green means the class, the teacher and the room are free then. Red lists what the lesson clashes with.
7. Press **Add the lesson** 6.

The **Status** of a lesson is *Active* (the default), *Draft* or *Disabled*. You can also give it a colour (otherwise each subject gets its own) and a note.

A lesson lasts from 10 to 300 minutes and may not run past midnight. The subject and stream must belong to the class.

Clashes

A lesson cannot be saved on top of another lesson of the same class, the same teacher or the same room at a time that overlaps. The box in the dialog says which lesson is in the way, for example *Grace Achen is already teaching Mathematics with P.6 on Monday 08:00–08:40*.

- A lesson for one stream clashes with the whole class's lessons and with that stream's. A whole-class lesson clashes with every stream's.
- A room clashes only when the lesson has a room.
- Active and draft lessons count. Disabled ones do not.
- Only lessons of the same year count, and a lesson for one term does not clash with another term's lessons.

When the double booking is meant, for example one teacher taking two streams together, tick **Save it anyway — a combined lesson, or a double booking we mean**, then save. The week marks lessons that clash, and a line above it says how many there are.

Changing, moving and removing lessons

- **Change a lesson**: click it in the week (or press the pencil in the list). Change what you need and press **Save changes**.
- **Move a lesson**: drag it to another day or time in the week. The move is checked for clashes in the same way. If it clashes, the lesson does not move: it opens at its new day and time with the clashes listed, so you can save it anyway or choose another time.
- **Copy a lesson**: press **Copy** in the lesson (or the copy button in the list). A copy opens on the next day; choose its day and time, then save.
- **Remove a lesson**: open it and press **Remove**. You are asked first.

Disabled lessons are hidden. Tick **Show disabled** to see them.

Teachers' load and classes

The **Teachers' load** tab lists every teacher on the timetable: their lessons, periods and hours a week, lessons each day, the classes they teach, and their load:

Load	Hours a week
Normal	Up to 20
Heavy	Up to 30
Too much	More than 30

Only active lessons count. Click a teacher's name to open their week, or press the print button to print it.

The **Classes** tab shows how complete the timetable is: lessons a week, how many classes have a timetable, and how many have a lesson for every subject. Each class shows its subjects timetabled, the lessons it has a week and the subjects *Not timetabled yet*. The arrow opens that class's week.

Rooms

Rooms stop two lessons (or two exam papers) being put in one room at the same time. Open **Rooms** beside the tabs.

1. Press **New room**.
2. Type the name, for example *Science lab*, and choose the kind: classroom, laboratory, hall, library or other.
3. Give the number of seats if it matters, a building if the school has buildings, and notes.
4. Leave **In use (offered when timetabling)** ticked.
5. Press **Add the room**.

Two rooms cannot have the same name. A room's row menu has **Edit**, **Switch off** (or **Use again**) and, for a room with no lessons, **Delete**. Click a room's name to see its week.

Printing

Print opens the week on screen as a PDF: a class (or one stream), a teacher or a room, for the term chosen. The half-shaded button beside it prints the same week in black and white.

> **TIP**
>
> To give every teacher their own timetable, open **Teachers' load** and press the print button on each teacher's row.

Good to know

- Teachers with active lessons on this year's timetable get **My lessons today** on their dashboard. It also shows any exam they invigilate that day.
- Teacher workload counts each teacher's periods from the timetable.
- The exam timetable uses the same rooms.

QUESTIONS

Can a teacher change the timetable?
No. Teachers see the timetable and open on their own week. Only the director of studies and the school administrator can add, move or remove lessons and rooms.

How do I timetable two streams together for one lesson?
Add the lesson for each stream. When the second one says it clashes, tick **Save it anyway — a combined lesson, or a double booking we mean** and save.

What does a lesson with no term mean?
It runs every term of the year. Choose a term only for a lesson that belongs to one term.

Why can't I delete a room?
A room that has lessons on it cannot be deleted. Switch it off from its row menu instead, or move its lessons first.

Where do teachers see today's lessons?
On their dashboard, in **My lessons today**, which marks the lesson going on now and the next one. It appears once they have active lessons on this year's timetable.

Generate a timetable

Set the school day, lessons a week and when teachers cannot teach. The generator proposes a week you review, change, publish and can undo.

For: Director of studies, School administrator · app.schooldynamics.ug/help/teaching/timetable-generator

The timetable generator builds a whole week for you. It starts from your school day, how many lessons each subject gets, who teaches them, the times teachers cannot teach and the rooms some subjects need. It never puts a teacher, a class or a room in two places at once. What it makes is a draft: you review it in the timetable, move what you want, and only publishing replaces the real timetable.

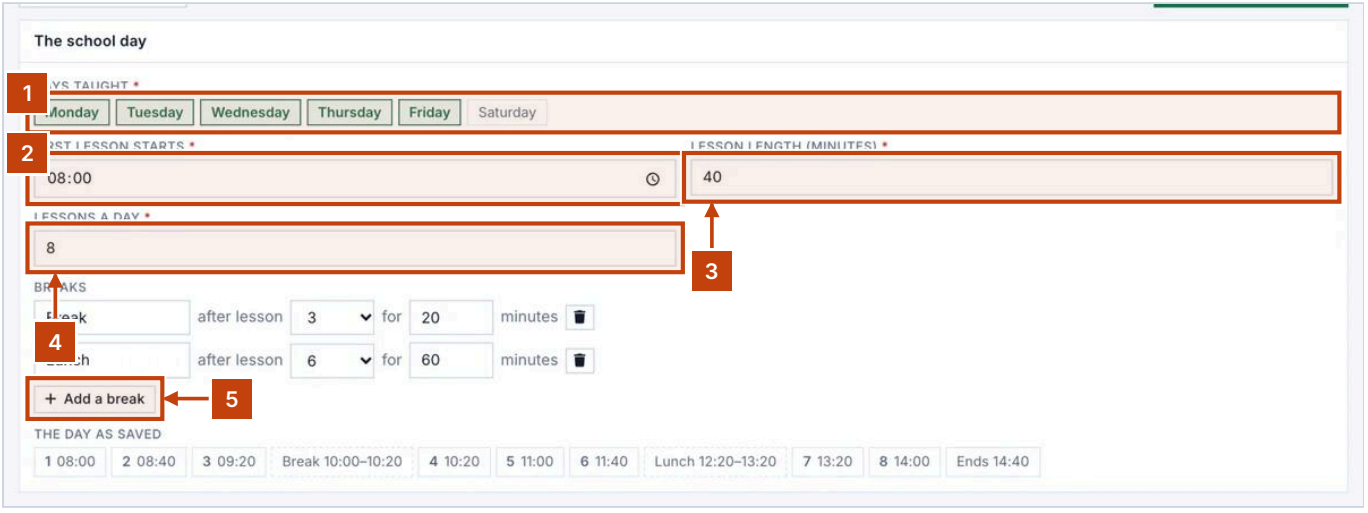
Open it from **Teaching › Timetable**, then the **Generator** tab.

Before you start

- Only the director of studies and the school administrator can use the generator.
- The year's classes and subjects must exist, and each subject should have its teacher. See Subjects.
- Add the laboratories and halls some subjects need under **Rooms** first. See The weekly timetable.

The generator has four tabs: **Drafts**, **School day**, **Lessons a week** and **Teachers**. Work through the last three, then generate from **Drafts**. The line under the tabs sums it up, for example *5 days × 8 lessons = 40 periods a week*.

1. The school day



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1. The days lessons are taught.
2. When the first lesson starts.
3. How long one lesson lasts.
4. How many lessons make a day.
5. Breaks and lunch, each after one of the day's lessons.

1. Open **School day**.
2. Choose the days taught 1. Monday to Friday is ticked at first.
3. Set when the first lesson starts 2, the lesson length in minutes 3 (20 to 120) and the lessons a day 4 (3 to 12).
4. Set the breaks 5: each has a name, the lesson it comes after and its length. At first there is a 20-minute break after lesson 3 and an hour's lunch after lesson 6.
5. Set the preferences (below) and the classes to timetable.
6. Press **Save the school day**. **The day as saved** shows each lesson's start time.

Preferences are what the generator tries to keep:

Preference	Means
Most periods of one subject a day	Per class, 1 to 4. Two allows a double.
Hard subjects in the morning, up to lesson	Hard subjects are kept before this lesson. At first, the last break.
Most lessons in a row for a teacher	2 to 12. A break ends a run.
Time the generator may take (seconds)	It stops then, with the best week found.

Under **Classes to timetable**, tick the classes to include. None ticked means every class. A class with streams gets a week for each stream, unless you tick **as one class**. The lessons of classes you leave out stay as they are, and the generator keeps their teachers and rooms free when they are teaching there.

2. Lessons a week

Open **Lessons a week** and choose a class. Each subject shows its lessons a week, its doubles, whether it is *Hard*, the rooms it needs and its teacher (one per stream when the class has streams). A line says how many of the week's periods are used; it turns red when the subjects need more than the week has.

Subjects marked *default* have not been set yet: the class's week is shared evenly between its subjects, leaving about a tenth free, and the compulsory subjects get the extra lessons.

To change a subject, click its name:

1. Type the **Lessons a week** and how many of them are **doubles** (two lessons in a row, for practicals). A subject can have at most half its lessons as doubles.
2. Tick **A hard subject: keep it in the morning** if it should be.
3. Under **Must be taught in**, tick the rooms it can use. Any one of them will do. With none ticked, it is taught in the class's own room.
4. Choose the teacher, or leave *The subject's own teachers, in turn*.
5. To use the same lessons, doubles and rooms for this subject in every other class, tick the box at the bottom.
6. Press **Save** (the button names the subject).

Defaults puts the subject back to the shared-out week.

3. Teachers

Teachers lists each teacher's periods a week (from the lessons a week of their subjects), their free periods and the classes they teach. *Too many* means they have more periods than free ones. Approved leave this term shows under the name.

To mark the times a teacher cannot teach, click their name. Tap a lesson to mark it; tap a day or a lesson number to mark the whole row. Then press **Save** (the button counts the times marked).

4. Generate and review

1. Press **Generate a timetable**.
2. Under **For**, choose the term (the active term is chosen), or every term of the year.
3. Leave **Seed** empty for a new draft.
4. Press **Generate the draft**. It works in the background for up to the time you allowed. You can leave the page.

The **Drafts** tab lists each draft with how many periods it placed (and how many it could not), its score and its state. A lower score is better: it counts the preferences the draft could not keep.

Click a draft's name to see its details: what it could not place and why, any warnings, and which preferences it broke.

Press **Review** to open the draft in the timetable itself. A blue band says you are looking at a draft. Moving, changing or removing lessons there changes only the draft, with the same clash checks as the real

timetable, plus the times teachers cannot teach. **Back to the timetable** leaves the draft.

5. Publish, undo, remove

Press **Publish** beside a draft (or **Publish…** in the review band). The window says exactly what will happen: which classes' timetable is replaced for the term, how many of their lessons will be switched off, and how many lessons the draft will write. Press **Publish** (the button counts the lessons) to go ahead.

> ⚠ CAREFUL
>
> Publishing replaces the timetable of the classes in the draft. Lessons that ran every term stop for the whole year. Each lesson is checked for clashes again as it is written; a clash you did not keep on purpose stops the whole publish, and nothing changes.

- **Undo**: the lessons a publish switched off are kept. Press **Undo** on the latest published draft of the year: its lessons are switched off and the old ones come back.
- **Remove**: a draft that is ready, failed or undone can be removed with the bin button. Its lessons are deleted; the timetable does not change.

Only one draft can be generated or published at a time. If another is running you are asked to wait for it to finish.

QUESTIONS

Does generating change the timetable teachers see?
No. A draft changes nothing. Only publishing replaces the timetable, after you confirm, and the latest publish can be undone.

Why were some lessons not placed?
Click the draft's name: its details list each subject that could not be placed, with the reason. Fewer lessons a week, more lessons a day, fewer times teachers cannot teach or a longer time limit usually help.

Can I get the same draft again?
Yes. Type the draft's seed (shown in its details) when you generate. The same seed and the same settings give the same draft.

I published a draft by mistake. What do I do?
Press **Undo** beside it in the drafts list. Its lessons are switched off and the lessons it replaced come back. Only the latest published draft of the year can be undone.

The exam timetable and invigilators

Plan a term's exam papers day by day, choose who invigilates each one, publish it for staff, and print it.

For: Director of studies, Head teacher, Teacher · app.schooldynamics.ug/help/teaching/exam-timetable

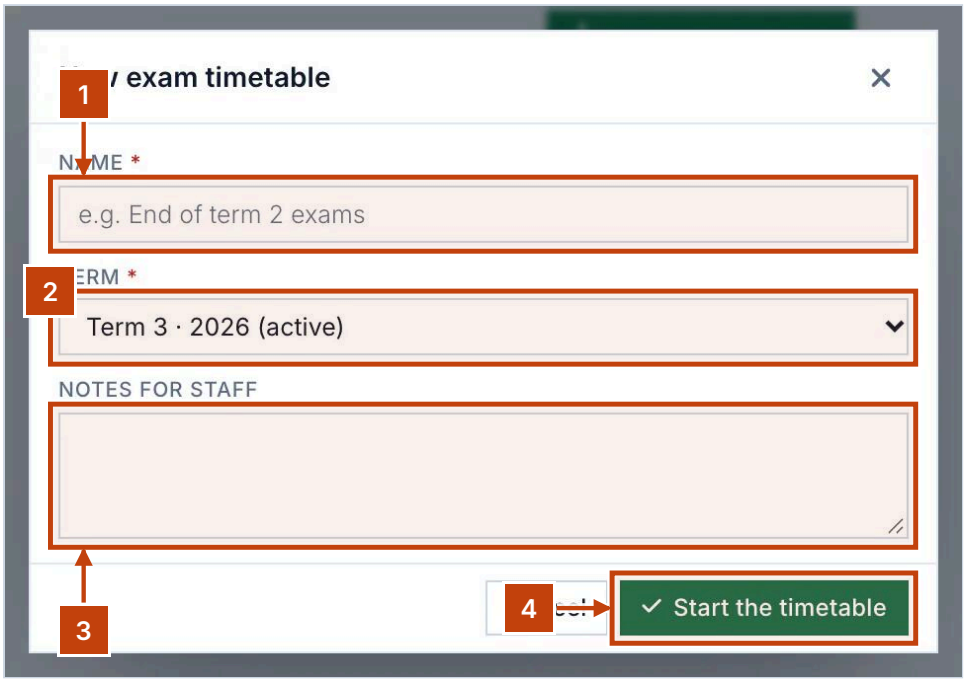
The exam timetable plans one sitting of exams, such as the end-of-term exams: which class sits which paper, on which day, from when to when, in which room, and who invigilates. It checks for clashes as you go, gives every teacher a list of their duties, and prints.

Open it from **Teaching › Exam timetable**.

Before you start

- The director of studies, the head teacher, the deputy and the school administrator build exam timetables.
- Every other member of staff who can see the Teaching menu reads the published ones and their own duties.
- The rooms come from the timetable's **Rooms** page. See The weekly timetable.

Start an exam timetable



The demo school · invented names and figures

1. A name staff will recognise, for example End of term 2 exams.
2. The term the exams belong to.
3. Notes for staff, shown under the name.
4. Starts it as a draft. Add its papers next.

1. Press **New exam timetable**.
2. Type its name 1 and choose the term 2. The active term is chosen for you.
3. Add notes for staff if you have any 3.
4. Press **Start the timetable** 4.

It starts as a **Draft**: only those who build exam timetables can see it. **Rename** changes its name, term or notes. Once it has papers, its term cannot change: make a new exam timetable for another term.

Add the papers

1. Press **Add a paper**. To add one on a day already listed, press **Paper on this day** beside that day.
2. Choose the class and the subject. Under **Paper**, add *Paper 1* or *Practical* if the subject has more than one.
3. Choose the day, and when it starts and ends. A new paper starts with the same day and times as the last one you added.
4. Choose a room if it needs one, and add a note to print on the timetable, for example *Bring a calculator*.
5. Read the box at the bottom: green means the class, the room and the invigilators are free.
6. Press **Add the paper**.

A paper cannot be set on a Sunday, must end after it starts, and lasts at most 6 hours. The class must be in the term's year.

A paper clashes when the class already sits a paper at that time, or the room is already used. The check covers every exam timetable of the school, draft or published. When it is meant, tick **Save it anyway — we mean it**.

To change or remove a paper, press the pencil on its row. **Remove** takes its invigilators off too.

Choose the invigilators

1. Press the person button on a paper's row. **Who invigilates** opens.
2. Find each member of staff and tick them.
3. Choose one as **Chief** if you want.
4. Press **Set** (the button counts the invigilators).

The window warns when someone is already watching another paper at that time, or is on approved leave that day. Tick **Save anyway — we mean it** to keep them. A paper can have up to 20 invigilators.

The **Invigilators** tab lists everyone with duties: their papers, hours and how many as chief. The print button on a row prints that person's duties.

Publish

Press **Publish** when the papers are in (an empty exam timetable cannot be published). Then:

- every member of staff with a duty sees it under **My duties**. Those with lessons on the timetable also see it on the day in **My lessons today** on their dashboard;
- the school calendar shows the exam week, from the first paper to the last;
- if the school sends fees reminders before exams, they count from the first paper. See Reminders and demand notices.

Back to draft hides it from staff again and drops the exam week from the calendar.

> ⚠ CAREFUL
>
> **Delete** removes the exam timetable with all its papers and invigilators, and cannot be undone. Only a draft can be deleted.

Print

- **Print** gives the whole exam timetable as a PDF. To print one class's papers, choose the class first, then press **Print this class**.
- Each invigilator's duties print from the **Invigilators** tab.

My duties

Every member of staff has a **My duties** tab. It lists their invigilation on published exam timetables, from a month ago onwards: the day and time, the class and paper, the room, and who else is watching. The number on the tab counts the duties still to come. The print button prints your own duties for that sitting.

QUESTIONS

Who can see the exam timetable?
Those who build it see drafts too. Every other member of staff who can see the Teaching menu sees it once it is published, and their own duties under **My duties**.

Can one invigilator watch two papers at the same time?
Only if you say it is meant: tick **Save anyway — we mean it** in **Who invigilates**. This is for one person walking between two small rooms.

Why can't I delete an exam timetable?
A published one is seen by teachers. Press **Back to draft** first, then **Delete**.

Does the exam timetable enter marks?
No. It plans when papers are sat and who watches them. Marks are entered under Marks entry, as always.

Schemes of work

Plan each subject's term week by week, mark lessons conducted or skipped, and have a supervisor approve the plan.

For: Teacher, Director of studies, Head teacher · app.schooldynamics.ug/help/teaching/schemes-of-work

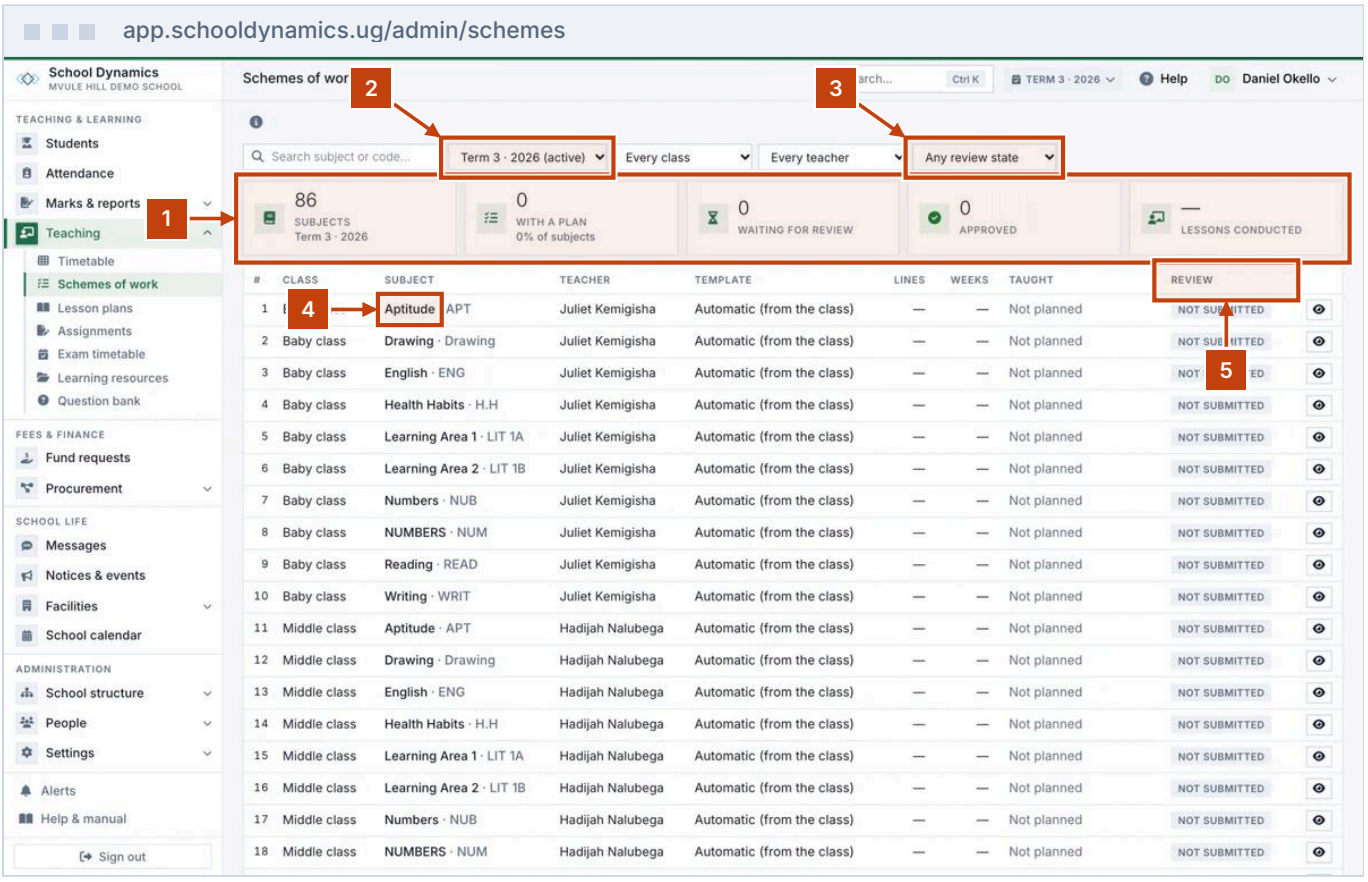
A scheme of work is a subject's plan for the term, week by week: the themes and topics, what is taught and how, with what materials. Teachers write the scheme for each subject they teach, tick off each lesson as it is conducted, and submit the plan for review. A supervisor approves it or sends it back.

Open it from **Teaching › Schemes of work**.

Before you start

- Teachers see the subjects they are named on as a teacher. Someone who teaches none is told so; ask the director of studies to add you. See Subjects.
- The head teacher, the deputy, the director of studies and the school administrator see every subject's scheme and review them.
- A teacher's own named supervisor (set on their staff record) sees and reviews that teacher's schemes too.

The list of schemes



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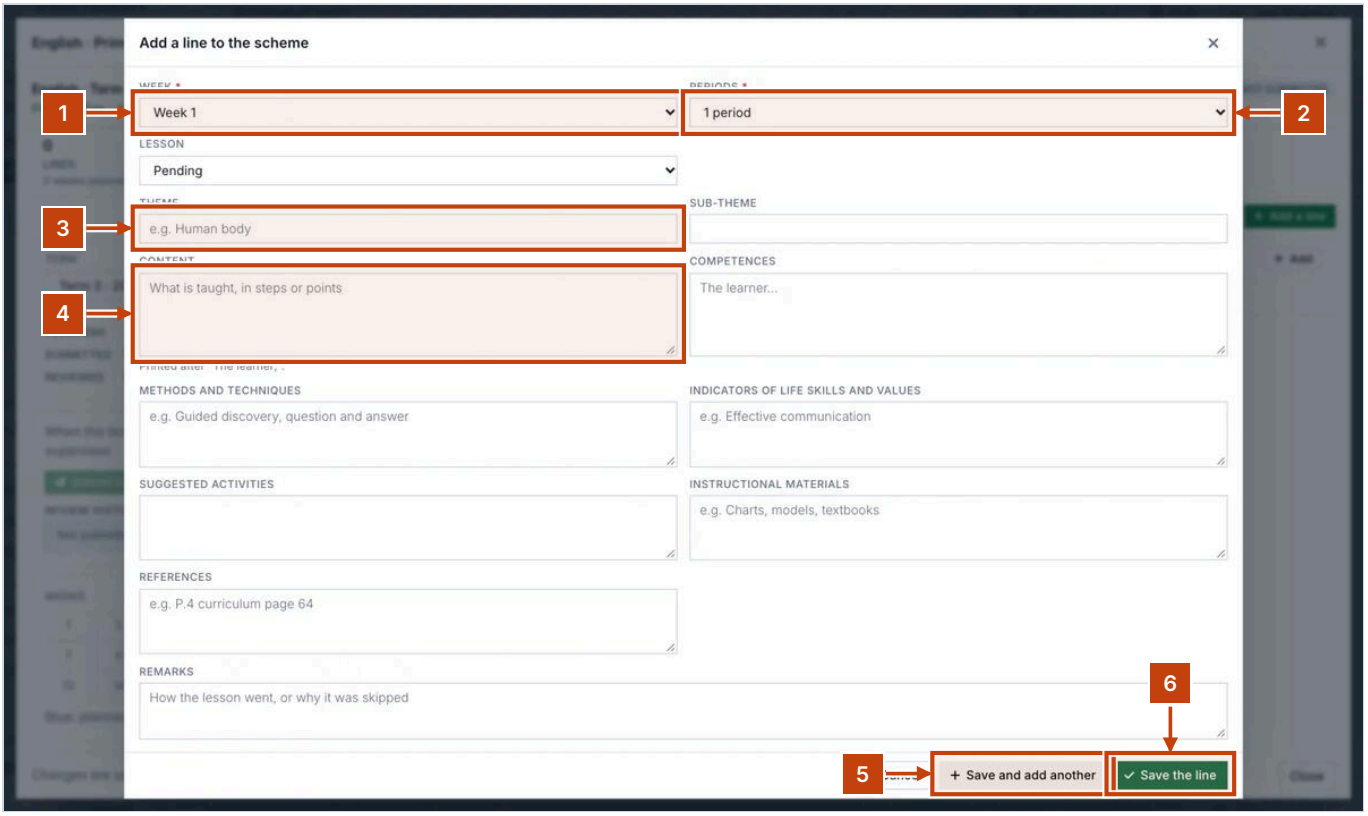
1. The term at a glance: subjects, those with a plan, waiting for review, approved, and lessons conducted.
2. The term. It opens on the active term.
3. Only the schemes in one state, for example Submitted.
4. Click a subject to open its scheme.
5. Where each scheme is: Not submitted, Submitted, Changes requested or Approved.

The figures at the top 1 cover the term chosen 2: the subjects, how many have a plan, how many wait for review, how many are approved, and the share of planned lessons conducted. Supervisors also see a line when schemes are waiting for them, with **Show them**.

Each row is a subject 4: its class, teacher and template, the lines and weeks planned, how many lessons were conducted (and skipped), and its review state 5. Use the review filter 3 to see one state only. The print button prints a subject's scheme for the term.

Plan the term

Click a subject to open its scheme. On the left are the term, the review and a grid of weeks 1 to 18: blue weeks are planned, green ones have every lesson done. On the right is the plan, week by week. Changes are saved as you make them.



The demo school · invented names and figures

1 The week of the term, 1 to 18.

2 How many periods the line takes.

3 The theme, then the topic and sub-topic.

4 What is taught, in steps or points.

5 Saves it and starts the next line of the same week.

6 Saves it and closes.

1. Press **Add a line**, or **Add** on a week.
2. Choose the week 1 and the number of periods 2.
3. Type the theme, topic and sub-topic 3.
4. Type the content 4, then the competences, methods and techniques, life skills and values, suggested activities, instructional materials and references.
5. Press **Save the line** 6. To type the next line of the same week, press **Save and add another** 5: the week, theme and topic stay filled in.

A line needs at least a theme, a topic or some content.

The fields follow the subject's layout. The nursery layout has a theme and sub-theme with one column of competences; the primary layout has a topic and sub-topic, with subject and language competences apart; the English (language) layout is the primary one with a single column of competences. **Automatic** picks the primary layout for P.1 to P.7 and secondary classes, and the nursery layout for the others. The director of studies and the school administrator can change a subject's layout under **Template**.

More ways to fill a scheme:

- **Copy a scheme** copies the lines of another term's scheme of this subject, or of the same subject in an earlier year, as lessons not yet taught. Weeks you have already planned are left as they are.
- Tick several lines and press **Set topic** to give them all the same topic.
- A line's row menu has **Edit the line**, **Write a lesson plan from it** (see Lesson plans) and **Delete**.

Record how the lessons went

Each line has three buttons: **Conducted**, **Skipped** and **Pending**. Press one as the term goes on. To add a remark (how it went, or why it was skipped), choose **Record the lesson** in the line's row menu, then press **Record lesson**.

You can record lessons all term, even after the scheme is submitted or approved.

Submit, approve or send back

The teacher submits:

1. When the term's plan is ready, press **Submit for review**.
2. Add a note for your supervisor if you want.
3. Press **Submit for review**.

The scheme needs at least one line. From now on the plan is fixed for the teacher until it is reviewed.

A supervisor reviews. Open the scheme and press:

- **Approve**, with a comment if you want. Every line of the term's scheme is marked approved.
- **Send back**, saying what should change, then **Send back to the teacher**. The teacher sees *Changes requested* with your comment, changes the plan and submits it again.

Nobody reviews a subject they teach: another supervisor does. A supervisor can approve a scheme that was never submitted, send back one already approved, and change the plan at any time. Every step is kept under **Review history**.

Print and spreadsheet

In an open scheme, **Print** gives the term's scheme as a PDF in the subject's layout. The menu beside it has **Print every term** and **Spreadsheet of this term**.

QUESTIONS

I cannot see my subject. Why?
You see only the subjects you are named on as a teacher. Ask the director of studies to add you to the subject. See Subjects.

Can I change my scheme after submitting it?

No. The plan is fixed while it waits for review and once it is approved. You can still mark lessons conducted or skipped. A supervisor can send it back if it needs changes.

Do I have to type the whole scheme again next year?

No. Open the new term's scheme and press **Copy a scheme**. Copy from another term of the subject, or from the same subject in an earlier year.

Who approves my scheme?

The head teacher, the deputy, the director of studies or the school administrator, or your own supervisor if one is named on your staff record. Nobody approves a subject they teach themselves.

Lesson plans

Write a plan for one lesson from the school's template, submit it, and have your supervisor approve it or send it back.

For: Teacher, Director of studies, Head teacher · app.schooldynamics.ug/help/teaching/lesson-plans

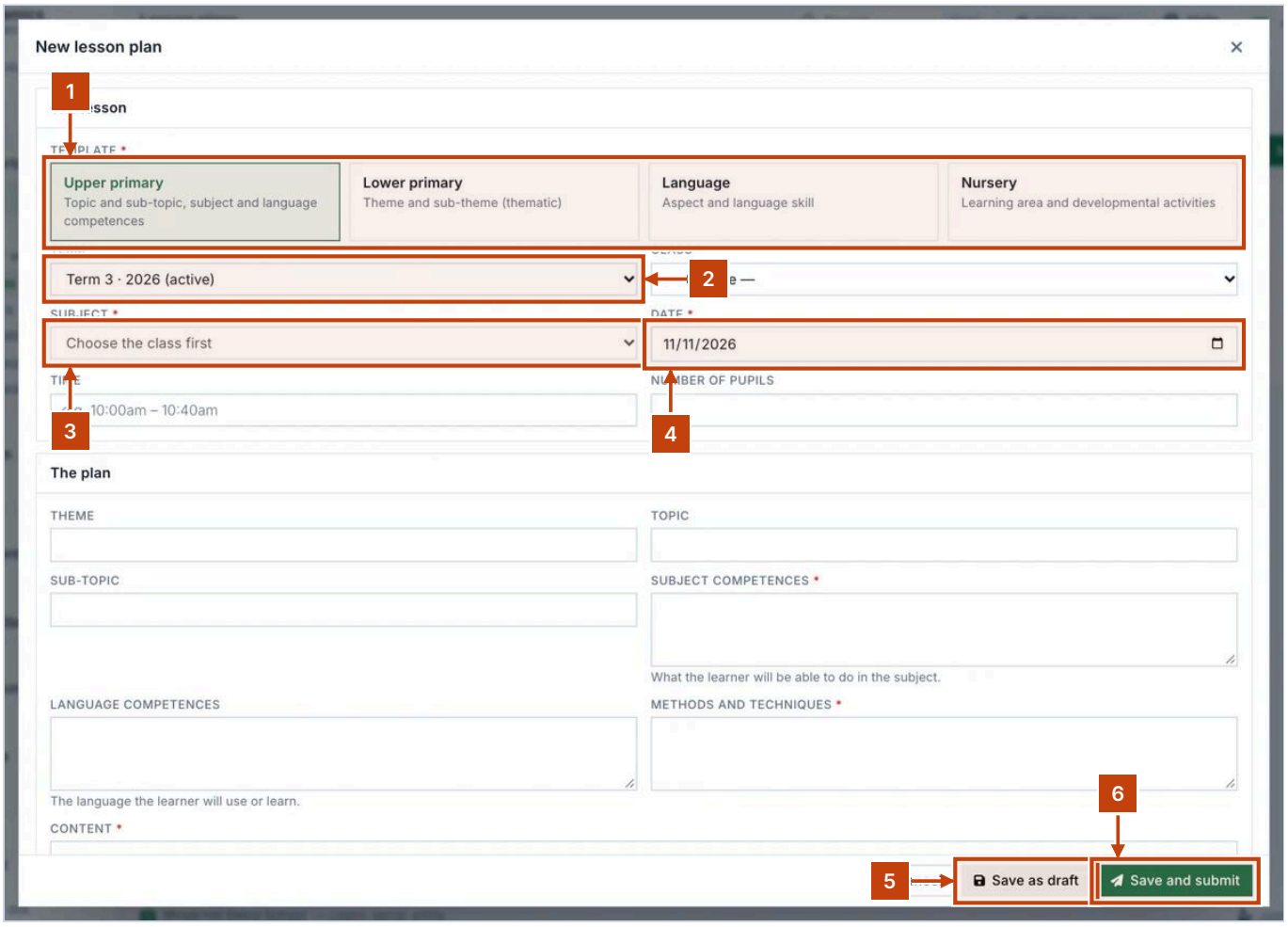
A lesson plan is the plan for one lesson: what will be taught, how, with what, and the steps of the lesson. Teachers write it from one of the school's templates and submit it. Their supervisor approves it or sends it back saying what to change.

Open it from **Teaching › Lesson plans**.

Before you start

- Teachers plan lessons for the subjects they teach. A nursery plan names a learning area instead of a subject, for a class the teacher teaches in.
- Teachers see their own plans and the plans of anyone they supervise. The head teacher, the deputy, the director of studies and the school administrator see every plan.
- A plan's supervisor is the teacher's supervisor on their staff record. The head teacher, the deputy, the director of studies and the school administrator can review anyone's plans, so a teacher with no supervisor named is still reviewed.

Write a plan



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1. The template: upper primary, lower primary, language or nursery.
2. The term, then the class.
3. One of your subjects in that class.
4. The day of the lesson.
5. Keep it as a draft to finish later.
6. Save it and send it to your supervisor.

1. Press **New lesson plan**.
2. Choose the template 1: **Upper primary** (topic and sub-topic, subject and language competences), **Lower primary** (theme and sub-theme), **Language** (aspect and language skill) or **Nursery** (learning area and developmental activities).
3. Choose the term 2 and the class, then the subject 3. For a nursery plan, type the learning area.
4. Set the date 4, and the time and number of pupils if you want.
5. If the subject has a scheme of work this term, choose a line under **Fill from the scheme of work** and press **Fill the plan**.
6. Fill in **The plan**. **More fields** shows the template's other fields.
7. Under **Lesson procedure**, type each step: its duration, its name, the teacher's activity and the pupils' activity. **Add a step** adds a row.
8. Press **Save as draft** 5, or type a note for your supervisor and press **Save and submit** 6.

These must be filled in before a plan saves: the subject competences (for nursery, the competences), methods and techniques, content, life skills and values, learning aids and references. If one is missing, the form says which.

Fill in **Self-evaluation** (strengths, areas to improve, strategies) after the lesson.

> TIP
> In a scheme of work, a line's row menu has **Write a lesson plan from it**. It opens a new plan with the class, subject, template and the line's content already filled in.

The head teacher, the deputy, the director of studies and the school administrator also see **Teacher** and **Supervisor** in the form, to write a plan for another teacher or choose who reviews it.

Find a plan

The page has two tabs, **Plans** and **By teacher**. The figures at the top count the term's drafts, plans submitted, plans sent back for changes and plans approved. Supervisors also see how many wait for their review.

On **Plans**, search by topic, theme or content, and filter by term, status, template and class. Supervisors can filter by teacher. When plans are waiting for you, press **Waiting for me** to see only those. Click a plan to open it; the print button prints it.

By teacher lists the teachers whose plans you can see (the head teacher, deputy, director of studies and school administrator see everyone who teaches a subject that year), even those with no plans, with their drafts, plans waiting for review (and since when), plans sent back, approved and the last lesson planned. Click a name to see that teacher's plans.

Submit and review

Open a plan to read it. The buttons at the bottom depend on who you are and where the plan is:

Button	Who	When
Edit	The plan's teacher	While it is a draft or sent back
Edit	The head teacher's office	At any time
Submit for review	The plan's teacher	A draft, or a plan sent back
Approve / **Send back**	The teacher's named supervisor, or the head teacher's office	A submitted plan, never your own
Delete	The plan's teacher, or the head teacher's office	A draft never submitted
Print	Everyone who can open it	Always

Here *the head teacher's office* means the head teacher, the deputy, the director of studies and the school administrator.

- **Submit for review** needs a short note for the supervisor.
- **Approve** takes a comment if you want one. Left empty, it says *Approved by* you on today's date.
- **Send back** needs you to say what should change. The teacher sees it at the top of the plan as *What to change*, edits the plan and submits it again.

Nobody reviews their own plan, and only a submitted plan can be reviewed. The plan's **Review** section keeps who submitted it, who reviewed it, when, and what they wrote.

QUESTIONS

Who reviews my lesson plans?
Your supervisor named on your staff record, or the head teacher, the deputy, the director of studies or the school administrator, who can review anyone's plans. Nobody reviews their own plan.

Can I change a plan after submitting it?
No. You can change it while it is a draft, or after it is sent back for changes. A supervisor can change it at any time.

Can I delete a plan?
Only a draft that was never submitted. The plan's teacher or a supervisor can delete it.

Do I have to type the plan from nothing?
No. If the subject has a scheme of work this term, choose one of its lines under **Fill from the scheme of work** and press **Fill the plan**.

Assignments and homework

Set homework, projects, classwork and quizzes for a class, see what was handed in, and mark it with scores and feedback.

For: Teacher, Director of studies · app.schooldynamics.ug/help/teaching/assignments

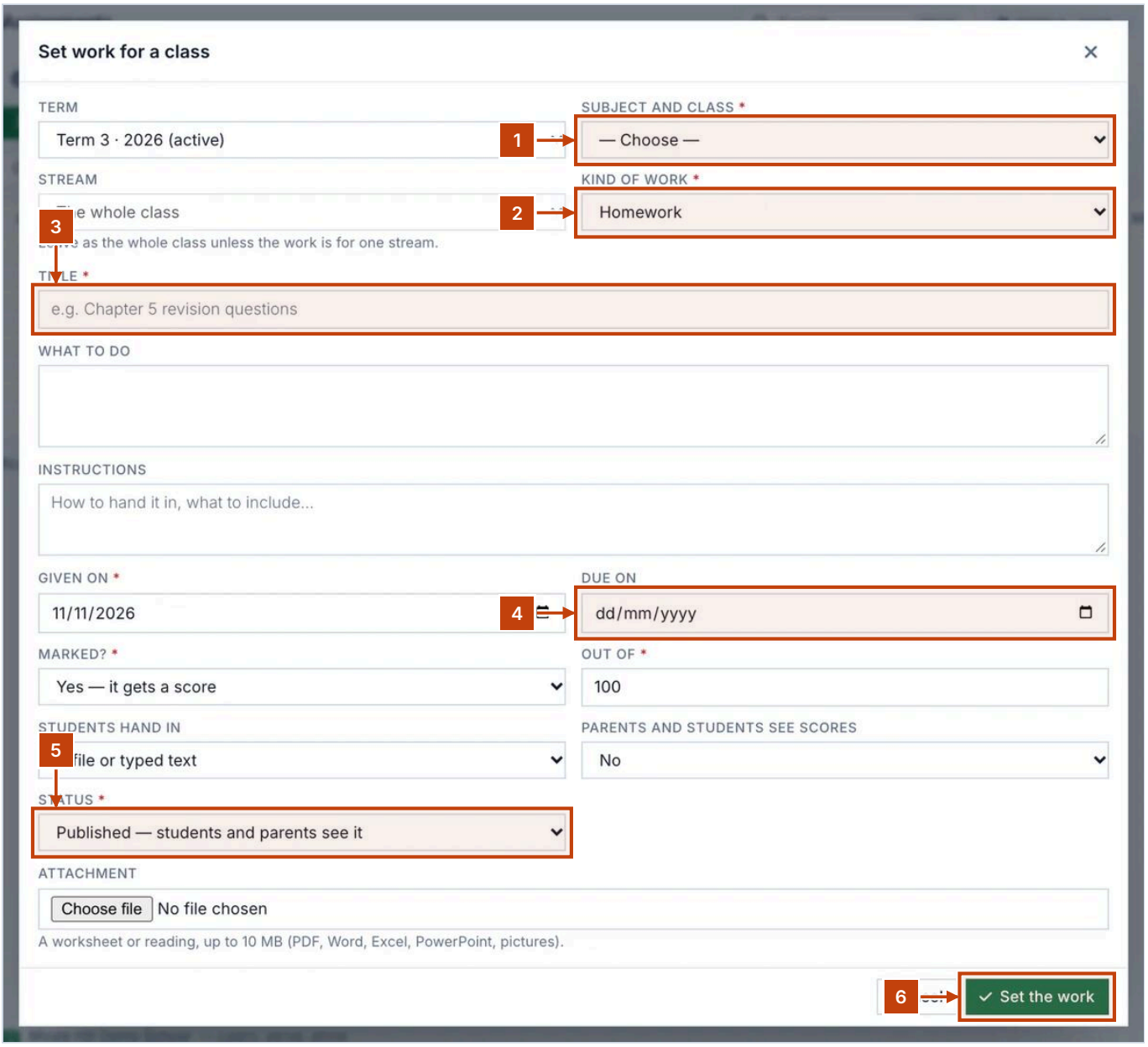
Assignments are the work teachers set for a class: homework, assignments, projects, classwork and quizzes. Every student of the class is listed on the work. Parents hand it in on the phone app, and the teacher records what came in, marks it and gives feedback here.

Open it from **Teaching › Assignments**.

Before you start

- Teachers set work for the subjects they teach. They see the work they set and the work others set for their subjects.
- The head teacher, the deputy, the director of studies and the school administrator see all work and can change any of it.

Set work



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1. The subject and class. Only the subjects you teach are offered.
2. Homework, assignment, project, classwork or quiz.
3. A short title students will recognise.
4. When it is due. It cannot be before the day it is given.
5. Draft keeps it hidden. Published shows it to students and parents.
6. Every active student of the class is listed for it.

1. Press **Set work**.
2. Choose the subject and class 1. Leave **Stream** as *The whole class* unless the work is for one stream.
3. Choose the kind of work 2 and type a title 3.
4. Type what to do and any instructions.
5. Set the day it is given and the day it is due 4.
6. Under **Marked?**, choose *Yes — it gets a score* and type what it is out of, or *No — only whether it was done*.
7. Choose how students hand it in: a file or typed text, a file only, typed text only, or nothing (done in class).
8. Choose whether parents and students see the scores on the app.
9. Choose the status 5, attach a worksheet if you have one, and press **Set the work** 6.

An attachment can be up to 10 MB: a PDF, a Word or Excel file, a CSV or text file, or a picture. The term is the active term unless you choose another.

Follow the work

The figures at the top count the work published, work due in the next 7 days, overdue work that students still owe, and work handed in but not yet marked. The tabs narrow the list:

- **Everything**: all the work, newest first.
- **Outstanding**: published work not yet handed in by everyone, due in the next 7 days, overdue or with no due date, soonest first.
- **To mark**: marked work with submissions still to mark.

Each row shows who the work is for, who set it, when it is due (highlighted when it is overdue), how many have handed it in, and how many are marked.

Mark the work

Click a piece of work to open it. Its figures show the students, how many handed in, how many are still out and how many are marked, with the average score. Under **Students' work** is every student:

1. Show **Everyone**, or only those **Waiting**, **Handed in**, **Marked** or **Not handed in**.
2. For each student, set the status, type the score and add feedback. Their typed answer, file, photos and any parent's comment show beside them.
3. Press **Save changes**.

Changes stay on the screen until you press **Save changes**. A score marks the work as marked. A score cannot be below zero or above what the work is out of, and work that is not marked takes no score. Rows that could not be saved turn red, with the reason.

To set several students at once, tick them and press **Handed in** or **Not handed in**. Once the due date has passed, **Waiting → not handed in** marks everyone still waiting as not handed in.

Change, close or delete work

The work's row menu, and the menu in its window, have **Edit**, **Publish**, **Close**, **Archive** and **Back to draft**:

Status	Means
Draft	Not shown to students and parents yet.
Published	Students and parents see it, and parents can hand it in.
Closed	Parents still see it, but no more work is taken.
Archived	Put away. Parents no longer see it.

Once students have handed work in, its class and stream stay as they are. You cannot lower what it is out of below a score already given.

Delete is offered only while nobody has handed the work in or been marked. After that, close or archive it.

The work's window also has **Add students who joined since**, and **Spreadsheet**, which downloads every student's status, score and feedback.

What parents see

Parents see their children's published and closed work in the phone app, and hand in published work there: typed text, a file, or up to 10 photos, as the work allows. Work already marked cannot be handed in again. They see the scores only when the work says parents and students see them. See The parents' app.

QUESTIONS

I do not see Set work. Why?
The button shows only to someone who teaches a subject. Ask the director of studies to name you as the subject's teacher.

How do parents hand work in?
In the phone app, while the work is **Published**. They type an answer, attach a file or send up to 10 photos, as the work allows.

Why can't I delete a piece of work?
Once any student has handed it in or been marked, it stays. Close it (no more work taken) or archive it instead.

A new student joined the class. Are they on the list?
Not on work set before they joined. Open the work and choose **Add students who joined since** in its menu.

Learning resources

Share notes, past papers and links with a class, for staff to find and parents to open in the phone app.

For: Teacher, Director of studies · app.schooldynamics.ug/help/teaching/learning-resources

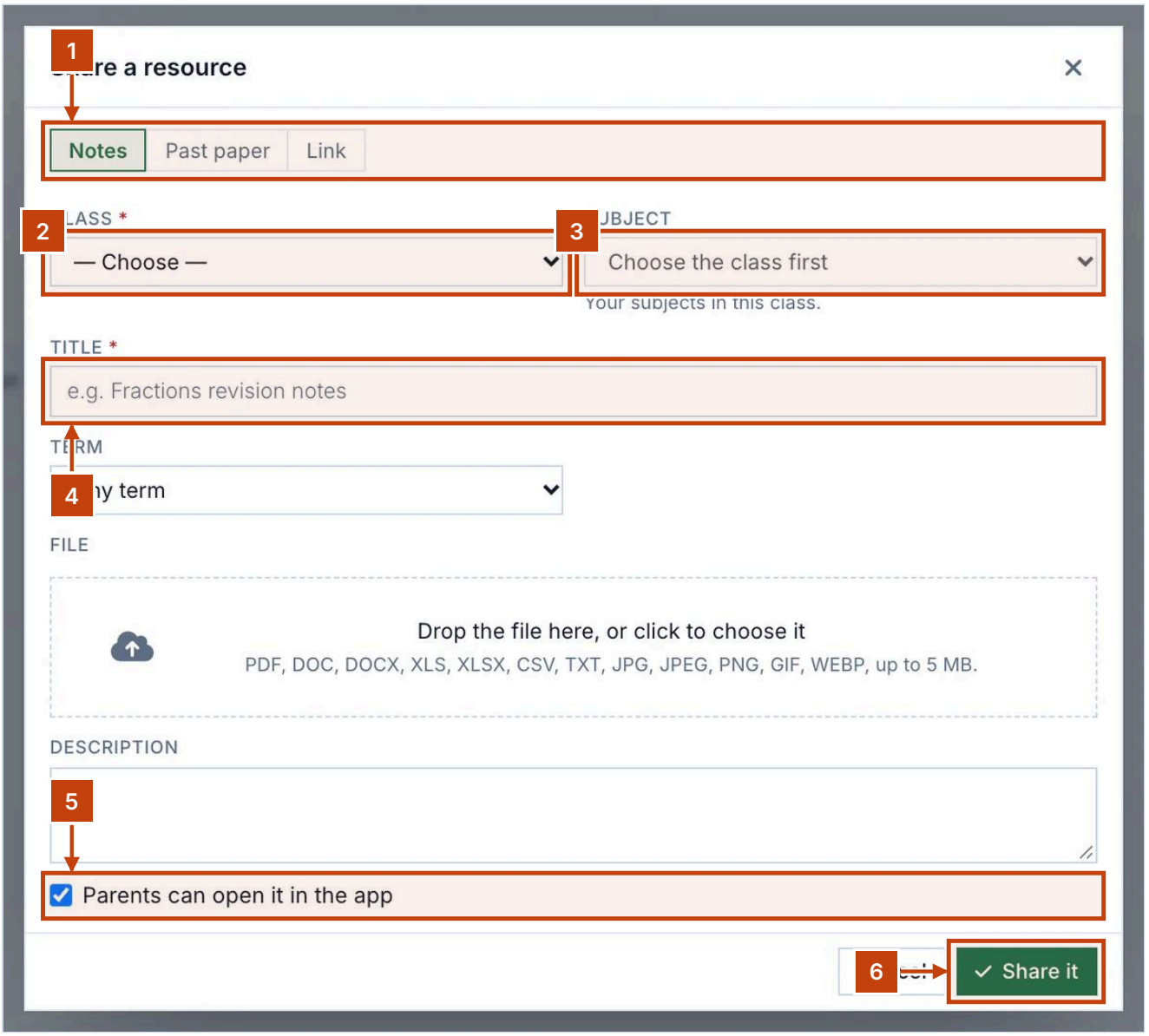
Learning resources are the notes, past papers and links teachers share with a class. Staff find them here; parents open the ones marked for them in the phone app.

Open it from **Teaching › Learning resources**.

Before you start

- Teachers, the head teacher, the deputy, the director of studies and the school administrator can share resources. Other staff who see the Teaching menu can read them.
- A teacher shares for the subjects they teach, or for a whole class they teach in.

Share a resource



The demo school · invented names and figures

1. Notes, a past paper or a link.
2. The class it is for.
3. One of your subjects in that class, or the whole class.
4. A title parents and students will recognise.
5. Untick it to keep the resource for staff only.
6. Shares it with the class.

1. Press **Share a resource**.
2. Choose the kind 1: **Notes**, **Past paper** or **Link**.
3. Choose the class 2, then one of your subjects 3, or leave *The whole class*.
4. Type a title 4, for example *Fractions revision notes*.
5. Choose a term if it belongs to one. For a past paper, type the year of the paper.
6. Drop the file in the box, or click it to choose the file. For a link, type the web address instead.
7. Add a description if it helps.
8. Leave **Parents can open it in the app** ticked 5, or untick it to keep it for staff.
9. Press **Share it** 6.

A file can be a PDF, a Word or Excel file, a CSV or text file, or a picture, up to 5 MB. Files are kept small because parents open them on phone data. A larger file is refused with a message: save it smaller (a PDF, or fewer pictures) and try again. A link must start with http:// or https://.

Find a resource

Search by title or description, and filter by class, subject and kind. Tick **Shared by me** to see only yours. Each row shows the class and subject, the kind (with a past paper's year), the size, who shared it and when. *Staff only* under a title means parents do not see it.

Press the download button (or the arrow, for a link) to open it, or the eye to see its details. The details window has **Open the file** (or **Open the link**), and, for the person who shared it and for the head teacher, deputy, director of studies and school administrator, **Edit** and **Remove**.

When you edit a resource, leave the file box empty to keep the current file.

What parents see

Parents see the resources marked for them, for the classes their children are in this year, in the phone app. When a resource is removed, parents no longer see it. See The parents' app.

QUESTIONS

Which parents see a resource?
Parents of children in that class this year, in the phone app, when **Parents can open it in the app** is ticked.

My file is too big. What do I do?
Files are kept small for parents on phone data. Save it as a PDF, or with fewer pictures, and share it again.

Can I change or remove a resource someone else shared?
Only the person who shared it can, or the head teacher, the deputy, the director of studies or the school administrator.

The question bank

Keep exam and practice questions by subject and topic, with a marking guide. Teachers type them, or draft them with AI and approve them.

For: Teacher, Director of studies · app.schooldynamics.ug/help/teaching/question-bank

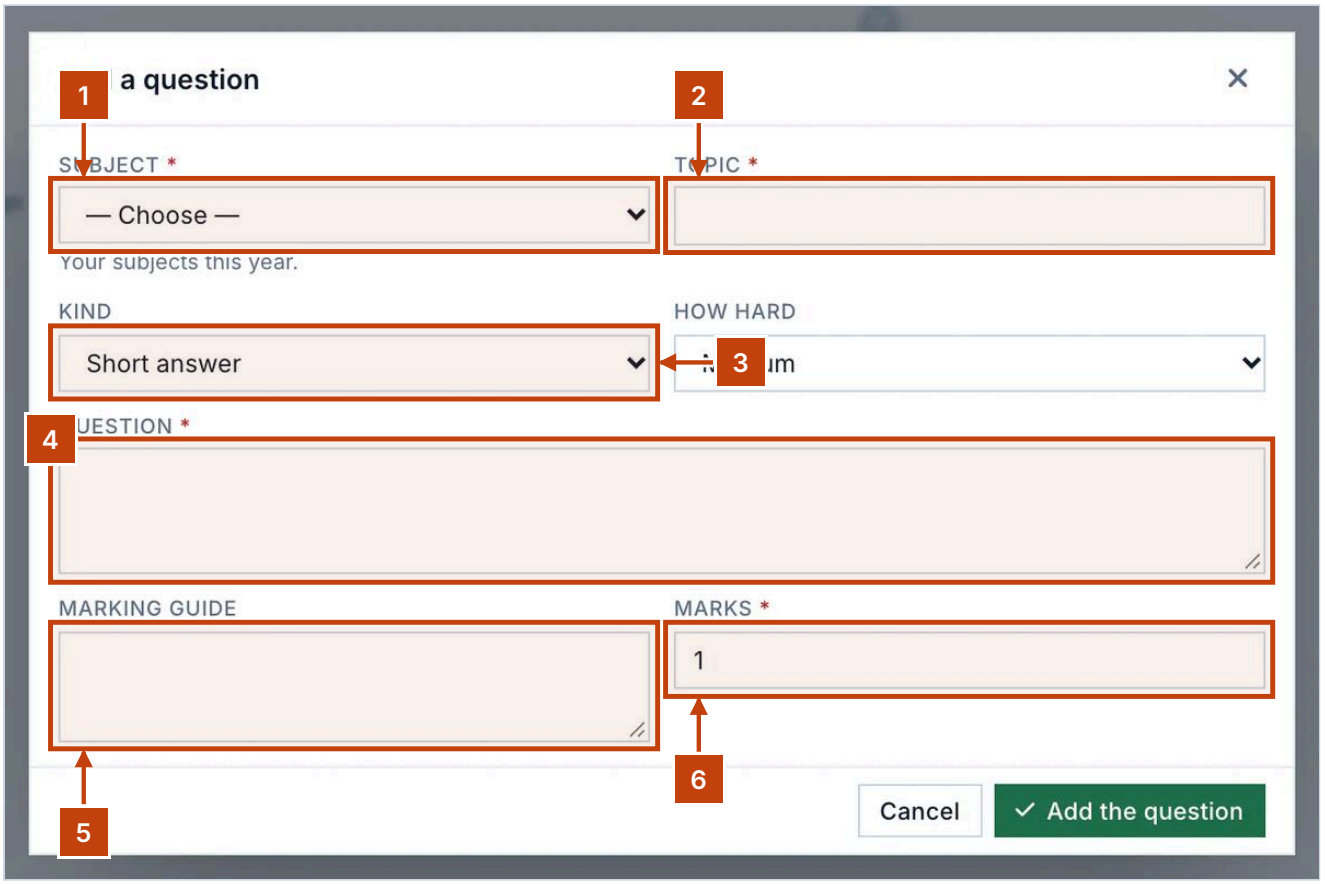
The question bank keeps exam and practice questions by subject and syllabus topic, each with a marking guide. Teachers build it up over the terms and draw on it when setting tests and exams.

Open it from **Teaching › Question bank**.

Before you start

- Every member of staff who can see the Teaching menu reads the questions in the bank.
- Teachers, the head teacher, the deputy, the director of studies and the school administrator can add questions. A teacher adds questions only for the subjects they teach this year.

Add a question



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1 One of the subjects you teach this year.

2 The syllabus topic.

3 Short answer, structured, multiple choice or essay.

4 The question as students will read it.

5 The marking guide: the answer, or the points that earn marks.

6 What the question is worth, 1 to 100.

1. Press **Add a question**.
2. Choose the subject 1 and type the topic 2.
3. Choose the kind 3 and how hard it is (easy, medium or hard).
4. Type the question 4. For a multiple-choice question, type the choices A to D.
5. Type the marking guide 5 and the marks 6.
6. Press **Add the question**.

A question you type goes into the bank at once. A multiple-choice question needs at least two choices.

Find a question

Search the topics and questions, and filter by class and subject. Each row shows the question, its kind and difficulty, the subject and class, the topic and the marks. Click a question to read it with its choices and marking guide, who added it and when.

The subject's teachers, the head teacher, the deputy, the director of studies and the school administrator can **Edit** or **Remove** a question from its window.

Draft questions with AI

When the school allows AI suggestions, those who add questions also see **Draft with AI**.

1. Press **Draft with AI**.
2. Choose the subject, then the topic. Topics from the subject's schemes of work and the syllabus are suggested as you type; you can type your own.
3. Choose the kind, how hard, and how many questions (up to 10).
4. Press **Draft the questions**.

The questions come back as your drafts, under **My drafts**. None is in the bank until you approve it. Read each one, change what you want with **Edit**, then press **Approve**. Drafts are never printed or shared.

> GOOD TO KNOW
>
> Only the subject's name, the class level and the topic are sent to the AI, with how many questions and what kind. The school's name and nobody's details are sent. The school administrator or the head teacher turns AI suggestions on or off with **AI suggestions** on the Alerts page.

QUESTIONS

Who can see the questions?
Every member of staff who can see the Teaching menu reads the questions in the bank. Teachers add and change questions only for the subjects they teach.

I do not see Draft with AI. Why?
The school has not allowed AI suggestions. The school administrator or the head teacher turns them on with **AI suggestions** on the Alerts page. If that button is not there, AI is not available on your system yet.

What is sent to the AI?
Only the subject's name, the class level, the topic, how many questions and what kind. Never the school's name or anyone's details.

Teacher workload

Each teacher's term in one table, with their periods on the timetable, classes and subjects, and how far their marks entry has got.

For: Head teacher, Director of studies · app.schooldynamics.ug/help/teaching/teacher-workload

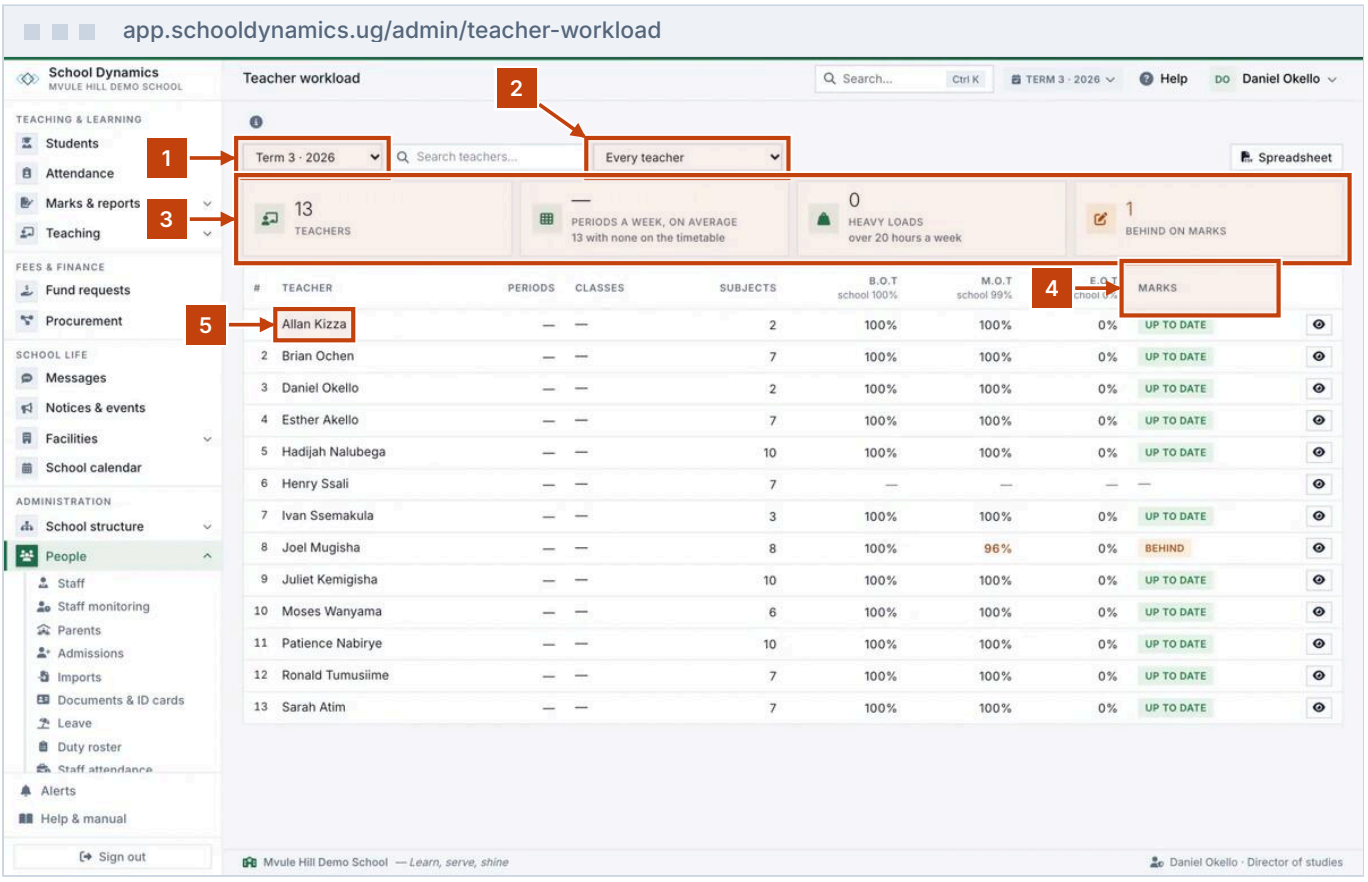
Teacher workload puts each teacher's term on one line: how many periods they teach a week, the classes they lead, the subjects they teach, and how much of their marks entry is done for each exam. It reads the timetable, the subjects and the marks; it changes nothing.

Open it from **People › Teacher workload**.

Before you start

- The head teacher, the deputy, the director of studies, the bursar and the school administrator can open it.
- Periods come from the timetable. Marks come from the term's report cards: the exams counted this term, or, if none is set, each exam anyone has entered marks for.

Reading the page



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1 The term.

2 Only those behind on marks, with heavy loads, or with no periods.

3 Teachers, average periods a week, heavy loads and those behind on marks.

4 Behind or Up to date, and the load when it is heavy.

5 Click a teacher to see their week and each subject's marks.

Choose the term 1. To see only some teachers 2, choose **Behind on marks**, **Heavy or too many periods** or **No periods on the timetable**, or search by name.

The figures at the top 3 count the teachers, the average periods a week (and how many have none on the timetable), the heavy loads (over 20 hours a week) and those behind on marks.

Each teacher's row shows:

- **Periods**: lessons a week on the timetable, with the hours.
- **Classes**: the classes they teach on the timetable.
- **Subjects**: how many subjects they are named on.
- **One column for each exam**: the share of their marks that are in. The column's heading shows the school's share. A teacher's figure is highlighted when it is below the school's.
- **Marks** 4: *Behind* when their share is below the school's for any exam, *Up to date* otherwise. *Heavy* (over 20 hours a week) or *Too many periods* (over 30) shows here too.

A mark counts as in when the teacher has submitted it. Only active students' marks count.

Everyone who has lessons on the timetable, leads a class or stream, or is named on a subject is listed.

One teacher's term

Click a teacher 5. The window shows their periods and hours, their subjects and their marks entry, then:

- their lessons on each day of the week;
- the classes and streams they lead as class or stream teacher;
- the classes they teach on the timetable, and their subjects;
- for each subject, the number of students and how many marks are in for each exam.

Open the timetable shows that teacher's week.

Spreadsheet

Spreadsheet downloads the table for the term: each teacher's periods and hours, classes, the classes they lead, their subjects, their share of marks in for each exam, and whether they are behind.

> **TIP**
>
> Before the end-of-term meeting, choose **Behind on marks** and talk to those teachers first. The term at a glance shows which classes and subjects are furthest behind.

QUESTIONS

What does Behind mean?
Less of the teacher's marks are in, for at least one exam, than of the school's marks as a whole. It measures how much is in, not when it was entered.

Why does a teacher show no periods?
They have no active lessons on this year's timetable for the term. Periods come only from the timetable.

Can I change anything on this page?
No. It only reads the timetable, the subjects and the marks.

07

Fees

Charge fees, take payments and give receipts, SchoolPay, bursaries, promises to pay and balances.

How money from parents is charged, received and followed up. Read **How fees work** first: it explains accounts and balances, which every other lesson in this chapter uses.

How fees work	5 min
Set the fee structure and bill the term	8 min
Charge for services students take	6 min
Record a payment and give a receipt	7 min
Student accounts, statements and balances	5 min
Fix a payment or a balance that is wrong	8 min
SchoolPay payments	9 min
Online payments with Pesapal	5 min
Give a bursary	4 min
Promises to pay	7 min
Payment plans	4 min
Requirements students bring	5 min
Import balances and service charges from a spreadsheet	8 min
Pocket money	3 min
Sell at the canteen	2 min
Match the bank statement to fees receipts	5 min
Reminders and demand notices	8 min

How fees work

Each student has one fees account. Bills and payments are lines on it, and the lines add up to the balance. Read this before the other fees lessons.

For: Bursar, Head teacher, School administrator · app.schooldynamics.ug/help/fees/how-fees-work

Everything in the Fees chapter rests on one idea. Each student has one fees account. Every bill and every payment is a line on it. The lines added up are the student's balance. Read this lesson once; the others assume it.

One account per student

Every student has a student account. It is made for them when they are admitted, or the first time something is billed or paid for them. You never create one yourself. You find it under **Fees & finance › Student accounts**, or from the **Fees** tab of the student's page.

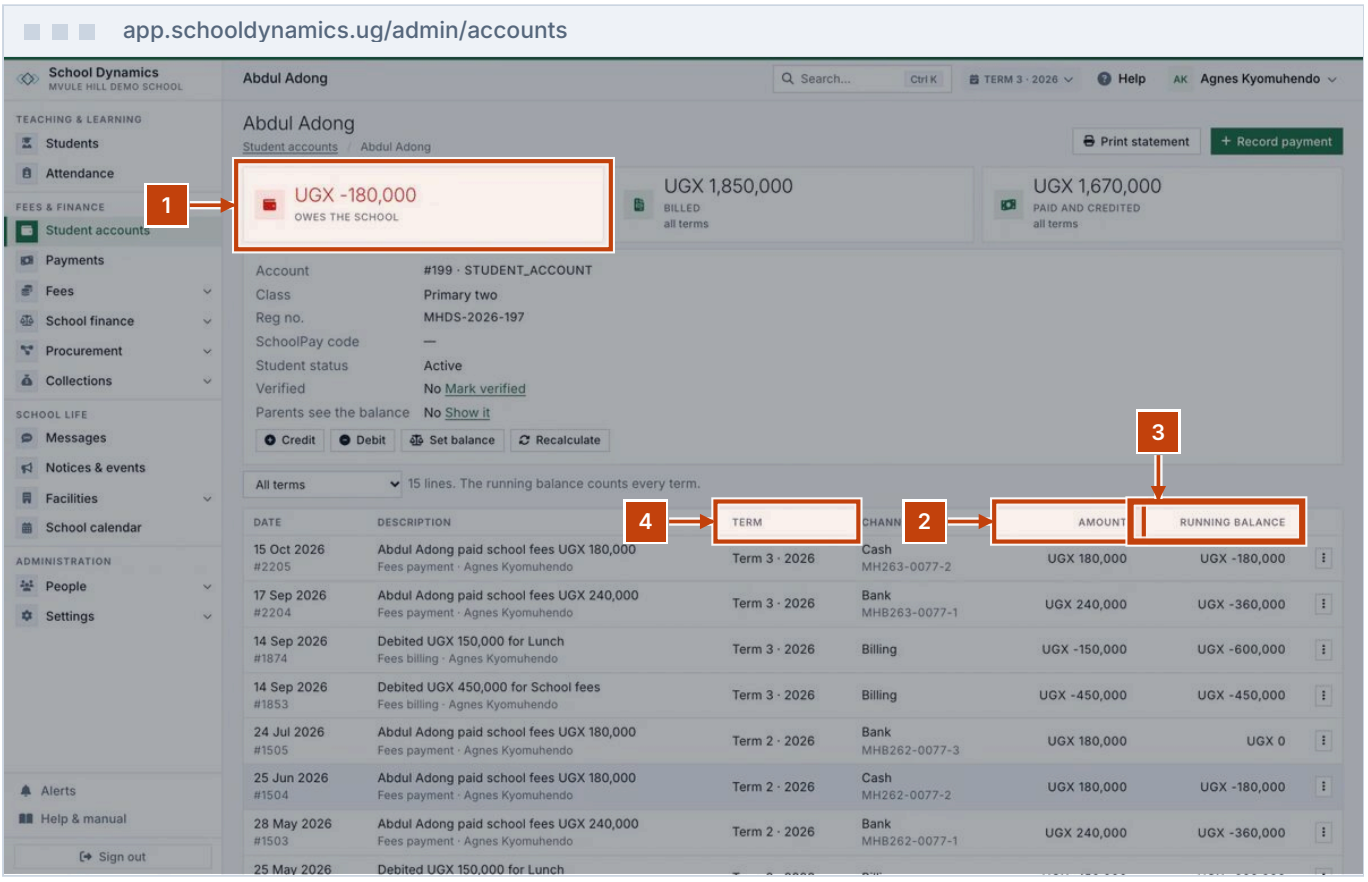
Lines: bills and payments

Nothing on an account is ever typed over. Everything that happens is a new line, with its date, its term, who recorded it and what it was for.

What happened	The line	Its amount
The term's fees were billed (from the Fee structure)	Fees billing	Minus
A service was billed (Services)	Fees bill	Minus
A parent paid: cash, bank, SchoolPay, online, the phone app	Fees payment	Plus
A bursary was awarded (Bursaries)	A bursary credit	Plus
Staff corrected the account (Fixing mistakes)	An adjustment	Plus or minus
Last term's balance was carried into the new term	Carried down and brought forward	A pair that cancels out

A bill is a minus figure because it takes the account down. A payment is a plus figure because it brings it back up.

The balance



A student's statement

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1 The balance: what the student owes, or holds in credit.

2 Each line. Bills and charges are minus figures; payments and credits are plus figures.

3 The balance after each line, counting every term.

4 The term each line belongs to.

The balance 1 is every line on the account added up, across every term. It is worked out again after every line is added, changed or removed, so it is always the sum of the lines 2 .

- **Below zero**: the student owes the school. UGX -300,000 means UGX 300,000 owed.
- **Zero**: cleared.
- **Above zero**: the student is in credit. They paid more than they were billed, and the extra counts against the next bills.

Most screens say this in words, so nobody has to decode a minus sign: *UGX 300,000 owed* in red, *UGX 20,000 ahead* in green, or *Cleared*. Receipts say *outstanding*, *Fully paid* or *in credit*. You type the minus sign yourself only when you enter a balance, for example in **Set balance**: there, a minus figure means the student owes.

A worked example, for a P.2 pupil in a new term:

Line	Amount	Balance after it
School fees billed	UGX -450,000	UGX -450,000
Lunch billed	UGX -150,000	UGX -600,000
Cash payment	UGX 300,000	UGX -300,000
Bank payment	UGX 200,000	UGX -100,000

The pupil owes UGX 100,000. The **Running balance** column of the statement 3 shows exactly this.

Terms

Every line belongs to a term 4. A line saved without one goes to the school's active term. The term decides where a line is counted: *billed this term* and *paid this term* add up only that term's lines.

The balance is different: it counts every term. What a student owed last term is still in their balance this term, even if nobody carries it forward. Carrying balances forward (from the Fee structure page) only makes the new term open with a balance brought forward, so the term's own figures include the old debt. It never changes the balance.

Pages with term figures start on the active term. The account's quick view and the Fee structure follow the term chosen in the top bar; the Payments page has its own term list. The student's **Fees** tab always shows the active term.

How fees get billed

Class fees reach students on their own. They are billed when:

- a fee is saved for the active term (every active student in that class is billed);
- an active student is admitted to a class, or a student becomes active;
- someone presses **Bill all classes** or **Bill this class** on the Fee structure page.

Only active students are billed, and each fee only once per student. Pressing a billing button twice cannot bill anyone twice. The details are in Set the fee structure and bill the term.

Where payments come from

- **Recorded by staff**: cash, bank, SchoolPay or PegPay, typed in the **Record payment** dialog. See Record a payment.
- **SchoolPay**: payments made with the student's SchoolPay code arrive on the account by themselves once the school uses SchoolPay. See SchoolPay.
- **Online**: parents pay through the school's own Pesapal account. See Online payments.
- **The phone app**: the bursar can record a payment from the app too. See The phone app.

Wherever it comes from, a payment is one line, and the balance moves at once.

GOOD TO KNOW

A payment in the active term for a student who is not active makes them active again, as long as they have a class. That student then gets the term's fees billed.

Who can do what

Role	Can
Bursar	Everything below, and delete a line (it is kept in **Deleted transactions**)
Finance officer, school administrator	Record payments, bill fees, correct accounts
Head teacher, deputy head teacher	See every fees page, but not record payments or change accounts

The school's owner can do all of this too, except deleting a line, which needs the Bursar role. Other staff do not see the fees pages, except that the store keeper uses Requirements and the Canteen. Parents see their own child's balance and receipts only if the school shows that account to parents (see Student accounts).

What happens next

- Every line posted, changed, reversed or deleted is written in the school's audit log.
- When the school switches on the *Payment received* text, the parent gets an SMS for each payment. Automatic texts are off until the school turns them on: see Automatic messages.
- Read on: Set the fee structure and bill the term, then Record a payment.

QUESTIONS

Why is the balance a minus figure?
A minus balance is what the student owes: UGX -300,000 means they owe UGX 300,000. Most screens say it in words instead (*UGX 300,000 owed*, *UGX 20,000 ahead*, *Cleared*). You meet the minus sign when you type a balance, for example in **Set balance**.

Does a student's balance start again at zero each term?
No. The balance counts every line in every term. What was owed last term is still owed. The term figures (billed this term, paid this term) are separate.

Can I type a new balance over the old one?
Not directly. **Set balance** posts one adjustment line for the difference, with your reason, so the statement still adds up. See Fixing mistakes.

Who can see and change fees?
The bursar, the finance officer and the school administrator can record payments and correct accounts. The head teacher and the deputy can see every fees page but not record payments or change accounts. Only the bursar can delete a line.

Set the fee structure and bill the term

Add what each class pays in a term, bill it to every active student, correct a fee after billing, and carry balances into a new term.

For: Bursar, School administrator · app.schooldynamics.ug/help/fees/fee-structure

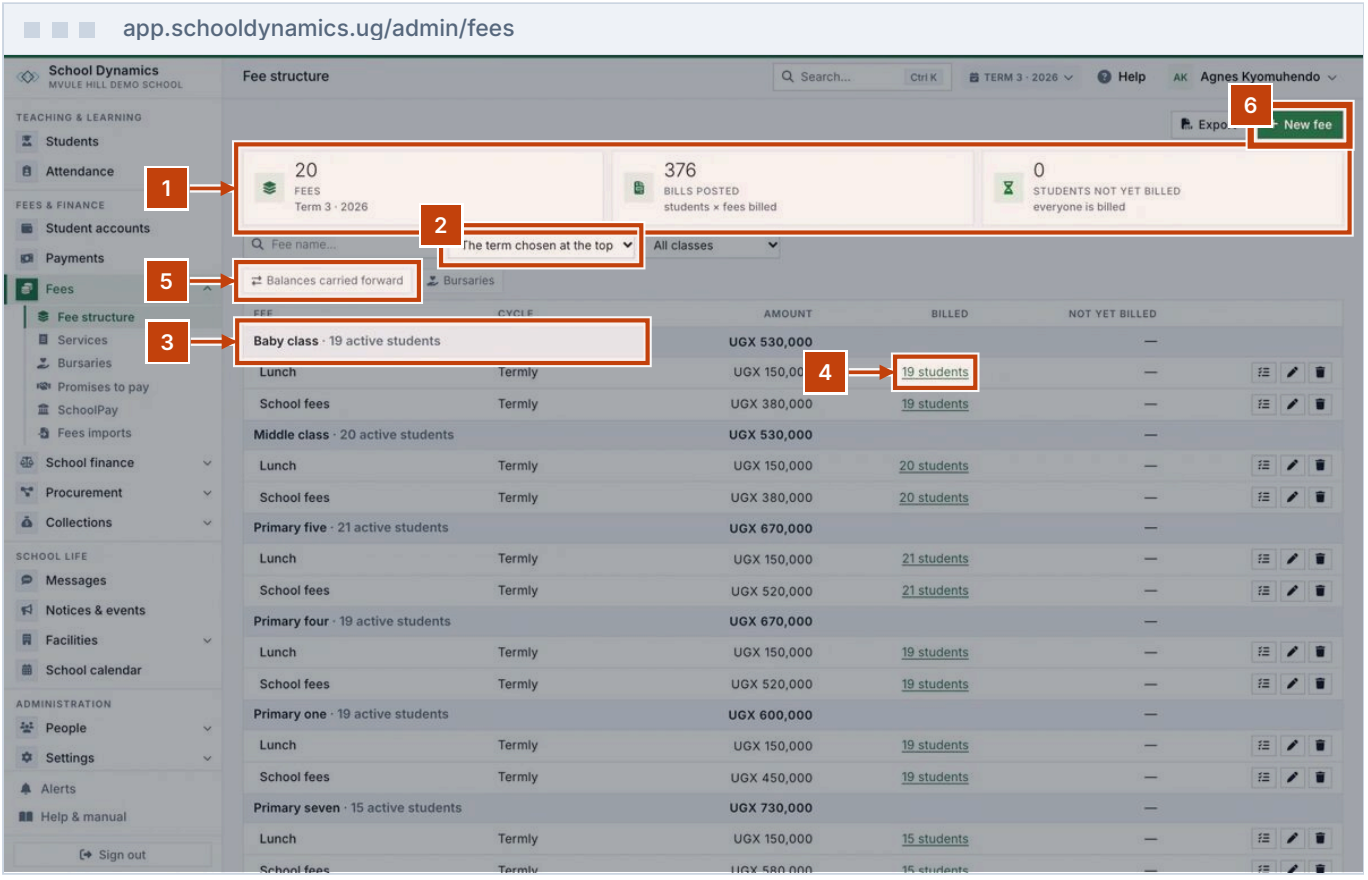
The fee structure is what each class pays in a term: school fees, lunch, a development fund. When the term is the active term, each fee becomes a bill on the account of every active student in the class. You set it up at the start of every term, before parents start paying.

Open it from **Fees & finance › Fees › Fee structure**. The fee structure is one part of how a student's balance is made. If you have not read it yet, start with How fees work.

Before you start

- The bursar, the finance officer and the school administrator can add, change and bill fees. The head teacher and the deputy can look but not change anything.
- The school needs an active term. If the page says *This school has no active term*, set one under **Academic years** (see Years and terms).
- The term's classes must exist for that academic year.

Reading the page



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1. The term's fees, the bills posted, and how many active students are not billed yet.
2. The term shown. It follows the term in the top bar; choose another to look back.
3. Each class, its active students, and what one student pays in all.
4. How many students are billed for this fee. Click to see their bills.
5. Carry last term's balances into the new term.
6. Add a fee for a class and a term.

The figures at the top 1 count the term's fees, the bills already posted (students × fees), and the active students who have not been billed yet, with the total still to bill.

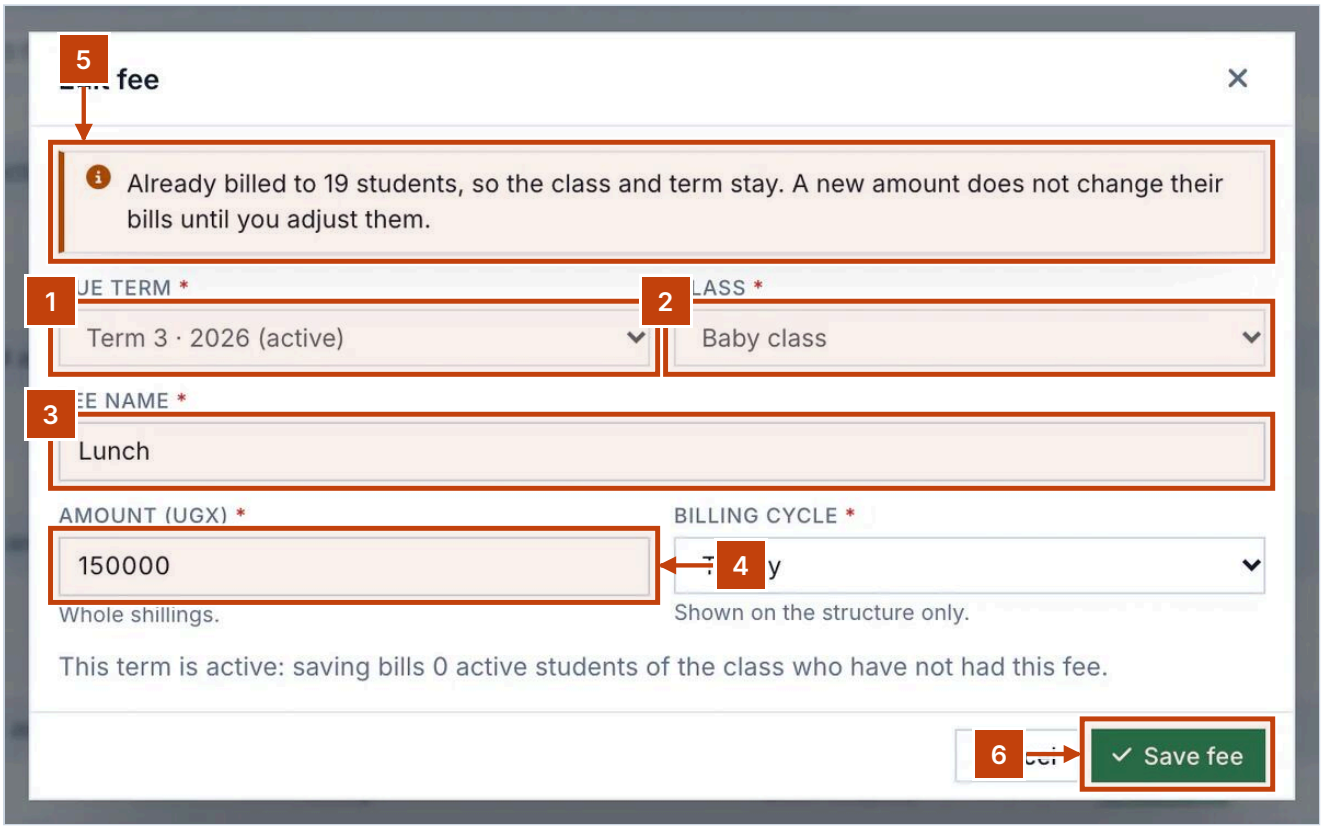
The page shows the term chosen in the top bar 2. Choose another term in the list to see or prepare its fees. You can also narrow the list to one class, or search by fee name.

Fees are grouped by class 3. The class line shows how many active students the class has and what one student pays in all. For example, P.4 with *School fees* at UGX 520,000 and *Lunch* at UGX 150,000 shows UGX 670,000.

Under each fee, **Billed** 4 says how many students carry the bill. Click it to see each student's bill (see below). For the active term, **Not yet billed** counts the active students still waiting for the fee.

Balances carried forward 5 opens the page that carries last term's balances into the new term (see below). **Bursaries** opens Bursaries.

Add a fee



The fee form, here for a fee that is already billed

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1. The term the fee is due in.
2. The class that pays it. Only classes of the term's year are listed.
3. The fee's name, as students' statements will show it.
4. The amount, in whole shillings.
5. This fee is already billed, so its class and term are locked.
6. Save. A fee due in the active term is billed to the class at once.

1. Press **New fee** at the top of the page.
2. Choose the **Due term** 1.
3. Choose the **Class** 2. Only the classes of that term's year are listed.
4. Type the **Fee name** 3, for example *Tuition* or *Lunch*.
5. Type the **Amount (UGX)** 4, in whole shillings.
6. Leave the **Billing cycle** on **Termly**, or choose **One time** for a fee paid once (a development fund, say). This is only shown on the structure; it does not change the bill.
7. Press **Add fee** 6. (When you change a fee, the button says **Save fee**.)

If the term is the active term, the dialog says how many students saving will bill, for example *This term is active: saving bills 20 active students of the class who have not had this fee.* Saving then puts the bill on each of their accounts at once. Their statement shows a line such as *Debited UGX 520,000 for School fees*.

A fee for a term that is not active yet is saved but not billed. When that term becomes active, the page offers **Bill all classes**.

A school with theology classes also sees **Class type**. Choose **Theology class** to charge a fee to the students of a theology class.

> ⚠ CAREFUL
>
> Each class can have only one fee of a name in a term. The page refuses a second *Lunch* for P.4 in Term 2, because it would bill every student in the class again. Change the fee that is there instead.

Billing the term

Fees are billed to students on their own in these cases:

- you save a fee whose due term is the active term (its class is billed);
- an active student is admitted to a class, or a student becomes active (for example when a payment arrives for them);
- an active student moves to another class during the term: the old class's fees for the term are reversed and the new class's fees are billed (see Changing class).

Anyone left over is counted under **Students not yet billed**. To bill them:

1. Press **Bill all classes** at the top, or **Bill this class** on a class's line.
2. Check the list. It names each student, the fee and the amount, and the total to bill.
3. Press **Bill … students**.

Only active students in the class are billed, and only for fees of the active term. A student already billed for a fee is left out, so you cannot bill anyone twice. If someone billed or a student moved while the list was open, nothing is posted and the page asks you to check the list again.

> 💡 TIP
>
> To bill one student, open their page and go to the **Fees** tab. When part of the term's fees is not billed yet, it says so and offers **Bill now**. See A student's page.

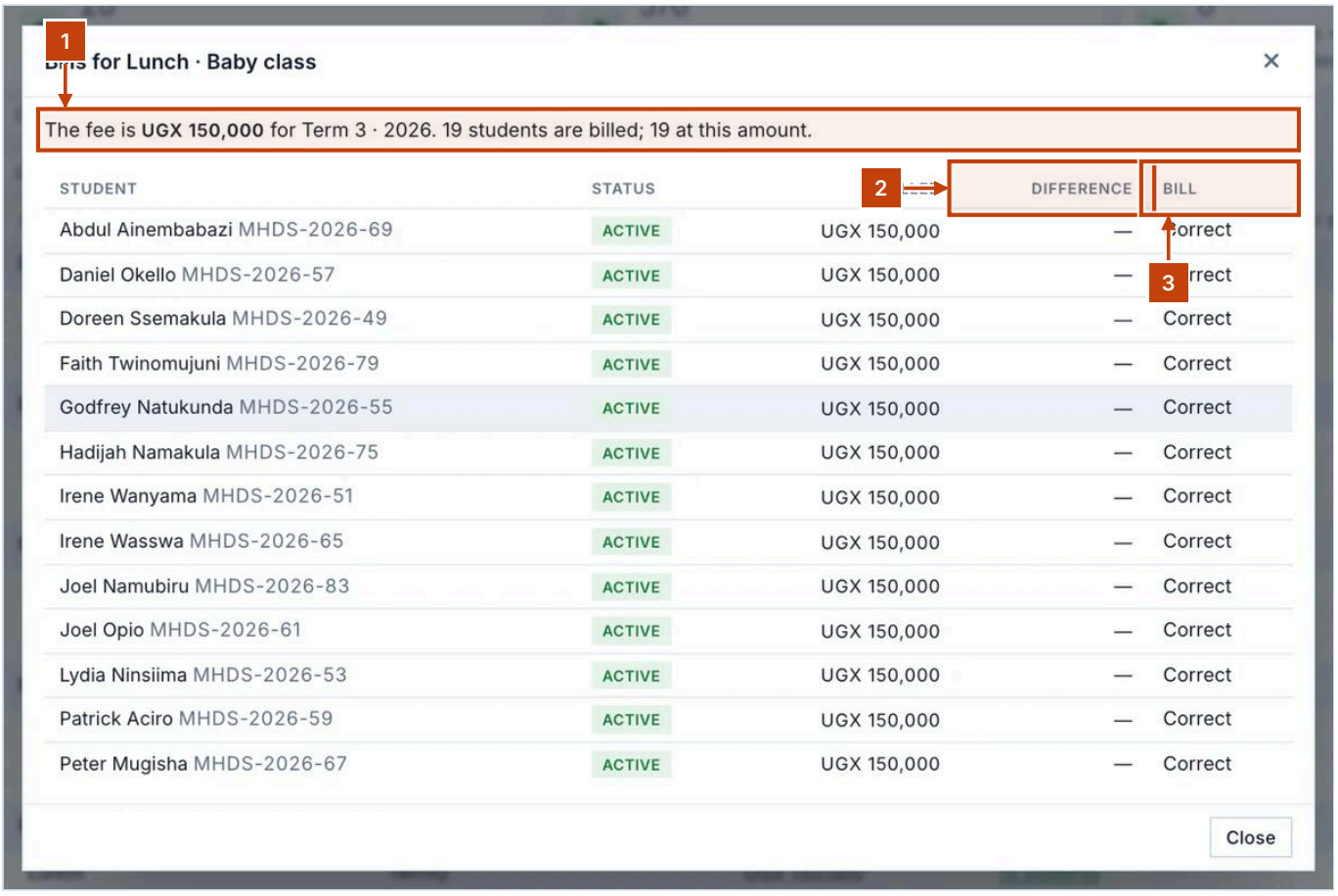
Change a fee

Press the pencil beside a fee. You can change its name, amount and billing cycle at any time.

Once a fee is billed, its class and term are locked. The dialog says *Already billed to … students, so the class and term stay* [5]. To move it, delete it (reversing its bills) and add a new fee.

A new amount does **not** change bills already posted. After you save, the page says *Students billed before the change still carry the old amount* and opens the fee's bills, so you can adjust them.

Check a fee's bills



The demo school · invented names and figures

1 The fee today, how many students are billed, and how many at another amount.

2 How far each bill is from the fee today.

3 Correct, To adjust, or left alone for you to fix from the statement.

Click the **Billed** count of a fee, or its list icon, to see every student billed for it. The top line 1 gives the fee's amount today, how many students are billed, and how many at another amount. **Difference** 2 shows how far each bill is from the fee today. The last column 3 says what will happen to each one:

It says	Means
Correct	The bill matches the fee.
To adjust	The bill is at another amount (the fee was changed after billing).
Bill line not found	The bill could not be found on the account. Left alone.
Two possible lines	More than one line could be this bill. Left alone.
Reversed by hand	Someone reversed the bill on the statement. Left alone.

When some bills are at another amount, press **Adjust ... bills to UGX ...** and confirm. Each of those students gets a correction line for the difference, linked to their bill. Their balance moves by that difference. Fix the ones left alone from the student's statement (see Fixing mistakes).

Delete a fee

1. Press the bin beside the fee.
2. If nobody was billed for it, press **Delete fee**. It is removed.
3. If students were billed, keep **Reverse their bills** ticked. The dialog says how many reversals it will post and their total.
4. Press **Reverse bills and delete**.

> ⚠ CAREFUL
>
> If you untick **Reverse their bills**, the fee goes but every bill stays on the students' accounts. Leave it ticked unless the bills are right and only the fee line is wrong. Bills that cannot be found are left as they are; the dialog says how many. If a bill cannot be reversed, the fee is kept and the page says why.

Carry balances into a new term

Each student's balance already counts every term. Carrying it forward makes the new term open with what was owed (or paid in advance) before it. For each student it posts two lines that cancel out: *carried down* in the old term, and a balance brought forward in the new one. The balance itself does not move. The new term's figures, such as **Brought forward** on the student's **Fees** tab, then include the old debt.

Open **Fee structure** and press **Balances carried forward**. The page lists every carry-forward already set up: the two terms, which students, whether it is **Processed**, and the totals carried.

1. Press **Carry balances**.
2. Choose the **From term** and the **To term**. One of the two must be the active term, and the first must come before the second.
3. Under **Students**, choose **Active students only** or **All students**.
4. Tick *When checked again later, update balances already carried if they have moved* if late payments or corrections should update what was carried.
5. Press **Continue**. Nothing is posted yet: the list of students opens.
6. Check the list. The **Action** column says **Carry**, **Refresh**, **Finish the pair**, **Already carried**, **Nothing to carry** (a zero balance) or **No account**.
7. Press **Carry ... balances**.

The amount carried is everything on the account from before the new term. A bill or payment already posted in the new term is not counted twice.

You can come back later and press **Check and carry** (or **Check again**). New students get their lines, and with the update box ticked, balances that have moved since are refreshed. Each pair of terms can be set up only once. If you try again, the page says it is already set up: process that one.

What happens next

- Every bill is a line on the student's account, and the balance falls by its amount. See Student accounts.
- Parents see the new balance on the parents' pages when the school shows them that account. See Student accounts.
- Charges that only some students take (transport, uniforms) are not class fees: set them up as Services. To bring in balances from a spreadsheet, see Fees imports.
- Every fee added, changed or deleted, and every billing run, is written in the school's audit log.

QUESTIONS

Do I have to enter the fees again every term?
Yes. A fee belongs to one class and one term. For a new term, add its fees with that term as the **Due term**. You can add them before the term starts: they are billed once that term is the active term.

A student joined in the middle of the term. Do I bill them by hand?
No. When an active student is admitted to a class, or a student becomes active, the class's fees for the active term are billed to them straight away. If anyone was missed, the page counts them under **Students not yet billed**, and the student's **Fees** tab offers **Bill now**.

What does the billing cycle do?
Nothing to the bill. **Termly** or **One time** is only shown on the structure. Every fee is billed once, for its own term.

Can pressing Bill twice charge a student twice?
No. Each fee is billed to a student only once. Billing again only reaches students who do not have the fee yet.

Can I move a fee to another class or term after it was billed?

No. The class and term of a billed fee are locked. Delete the fee (with **Reverse their bills** ticked) and add a new one.

Do I have to carry balances forward for the balance to be right?

No. A student's balance always counts every term. Carrying forward only makes the new term open with what was owed before it, which shows as **Brought forward** on the student's **Fees** tab.

Charge for services students take

Set up extra charges such as transport, swimming or uniforms, subscribe students one by one or a class at a time, and re-price or remove a subscription.

For: Bursar, School administrator · app.schooldynamics.ug/help/fees/services

A service is a charge that only some students pay: the school bus, swimming, a uniform, a set of books. Unlike class fees, it is billed only to the students subscribed to it. You set up the services once, then subscribe students each term.

Open **Fees & finance › Fees › Services**. The page has four tabs: **Services**, **Subscriptions**, **Batch subscriptions** and **Categories**.

Before you start

- The bursar, the finance officer and the school administrator can set up services and subscribe students. The head teacher and the deputy can look but not change anything.
- Every service sits under a category, so add the categories first.
- A service that comes with things from the store (a uniform, books) needs those items set up in the store first. See Keep the store.

Add a category

Categories are the headings services are filed under, such as *Transport* or *Uniforms*.

1. Open the **Categories** tab.
2. Press **New category**.
3. Type the **Name** and, if you like, a **Description**.
4. Press **Add category**.

Two categories cannot have the same name. A category can be deleted only when no service is filed under it.

The tab also shows, for each category, how many services it holds and what was subscribed this term and this year. These are amounts billed to subscribers, not money collected.

Add a service

1. Open the **Services** tab and press **New service**.
2. Type the **Name**, for example *Swimming*.
3. Choose the **Category**.

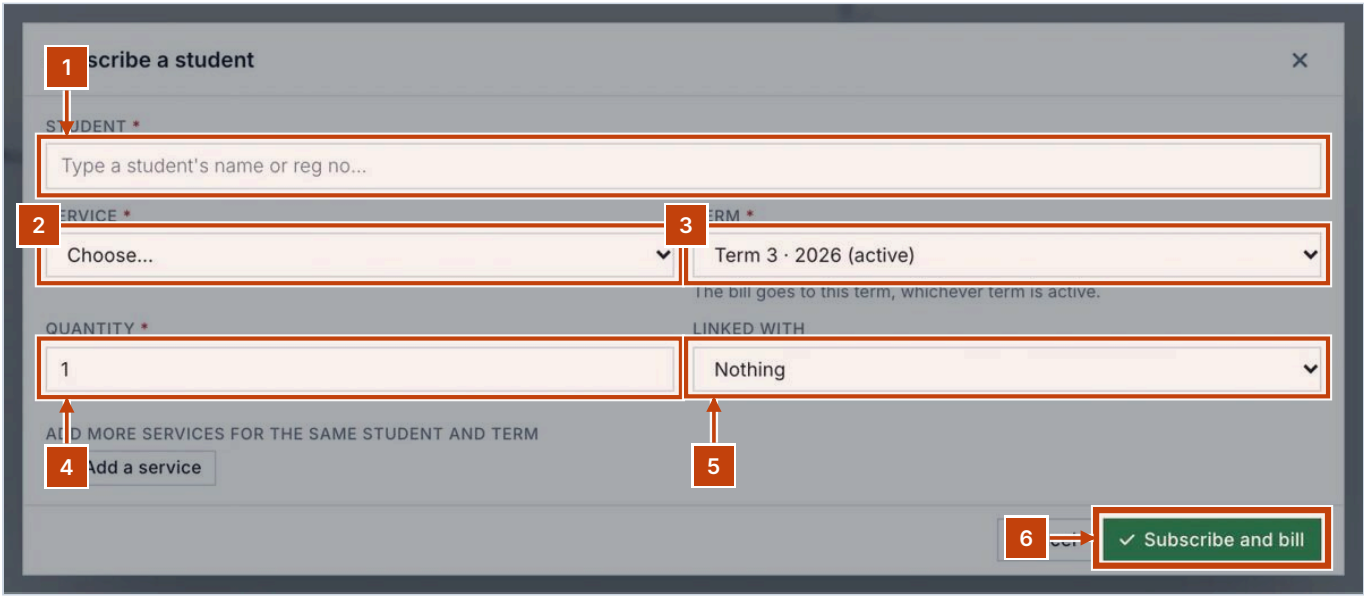
4. Type the **Fee (UGX)** for one subscription, in whole shillings. It may be 0.
5. Add a **Description** if it helps.
6. If the store hands something out with the service, tick *Items are handed out from the store with this service (uniforms, books…)* and tick the items. Each subscriber gets one of each.
7. Press **Create**.

The list shows each service with its category, fee, the items it hands out, how many students take it this term (**Subscribers**) and what it has **Billed this term**. Click a service's name for a quick view: who takes it, class by class, and the latest subscriptions. **Its subscribers** opens their list.

To change a service, press the pencil. A new fee is used for new subscriptions only. If some of this term's subscriptions were billed at the old fee, the page says how many, so you can re-price them (see below).

A service with subscriptions, a batch or bills on students' accounts cannot be deleted. Neither can the one marked **Default**.

Subscribe a student



The demo school · invented names and figures

1. Type the student's name or reg no, then pick them from the list.
2. The service. Its fee shows beside its name.
3. The term the bill goes to.
4. How many. The bill is the fee times the quantity.
5. Transport puts the student on a route's roster and asks for the stage and trip.
6. Subscribe the student and put the bill on their account.

1. Open the **Subscriptions** tab and press **Subscribe a student**.
2. Type part of the student's name or registration number 1 and pick them.
3. Choose the **Service** 2.

4. Check the **Term** 3. The bill goes to this term, whichever term is active.
5. Set the **Quantity** 4. Under the fields, the dialog shows what it will bill, for example *Bills UGX 300,000 (2 × UGX 150,000).*
6. Leave **Linked with** 5 on **Nothing**, or choose **Hostel** or **Transport**. Transport asks for the **Stage (pick-up point)** and the **Trip**, and puts the student on that route's roster for the term.
7. To add more services for the same student and term, press **Add a service** and choose them.
8. Press **Subscribe and bill** 6.

The bill is posted at once: the student's balance falls by the price, and their statement shows a line such as *Debited UGX 150,000 for Swimming service.* If the service hands out items, they wait for the student in the store.

A student can have each service only once a term. A second subscription is refused with *... is already subscribed to ... for ....*

Subscribe many students at once

Use a batch to subscribe a list of students, or whole classes, in one go.

1. Open the **Batch subscriptions** tab and press **New batch**.
2. Choose the **Term** and the **Service**, and the **Quantity per student**.
3. Under **Linked with**, leave **Nothing** or choose **Hostel**.
4. Add students: choose a class under **Add a whole class...** and press **Add its active students**, or type a name to add one student. Repeat for more classes. **Clear the list** starts again.
5. If the store hands something out, tick *Each student gets items from the store* and set each item's quantity. With no items listed, the service's own list is used.
6. Press **Save batch**. Nothing is billed yet.
7. On the batch's row, press **Process** and confirm. Every student in it is subscribed and billed.

When it finishes, the batch shows how many subscriptions were **Created**, how many students were **Already subscribed** (left as they were, not billed again) and how many **Failed**, with the reason for each. The list icon on a processed batch shows this again.

- **Reprocess** runs a processed batch again. Only students still missing the subscription are added. Use it after you add students to the batch.

- Tick several batches that are not processed and press **Process ticked** to run them one after another.
- A batch can be changed with the pencil, but its term and service stay. A batch that is not processed can be deleted; a processed one is kept as the record of what it did.

> GOOD TO KNOW
>
> Choosing **Transport** in a new batch does not save a batch. The students are subscribed and billed as soon as you press **Subscribe and bill … students**, and put on the stage's roster. Students already on transport that term are left as they are.

Find and check subscriptions

The **Subscriptions** tab lists who takes what. Filter by student, term (the active term at first), service and class. The chips narrow it further:

Chip	Shows
All	Every subscription that matches.
Not billed	Subscriptions with no bill yet (usually made in the old system).
Priced differently	Subscriptions billed at another price than today's fee × quantity.
Items to hand out	Subscriptions that come with items from the store.

For each subscription you see the quantity, the **Price**, what is **On the ledger** and the student's balance (owed or ahead). When what was billed differs from today's fee, it says so under the amount: *at today's fee: …*. **Export** saves the list as a spreadsheet.

Change or remove a subscription

Open a subscription with its eye icon. You can:

- **Change the quantity**: type the new **Quantity**. The dialog says what it will bill more or credit back. Press **Save and post the difference**.
- **Bill it now**: a subscription that was never billed shows *Not billed yet* and **Bill now**.
- **Change what it is linked with**: choose **Nothing**, **Hostel** or **Transport** and press **Save the link**. Nothing is billed or credited.
- **Change the items to hand out**: add or remove items and press **Save items**. The store hands them out from **Stores › To hand out**.
- **Remove it**: type why in the **Note** box and press **Unsubscribe**. Everything it billed is reversed back to the student's account.

To act on many at once, tick them and press **Re-price at today's fee** or **Unsubscribe**. Each row's menu (⋮) has the same two actions for one subscription.

> ⚠ **CAREFUL**
>
> Unsubscribing credits the student with everything the subscription billed. It needs a reason, which stays on the statement line. A subscription whose items were already handed out cannot be removed: take the items back in the store first, or keep the subscription.

What happens next

- Each bill, re-price and removal is a line on the student's account, in the subscription's own term. See Student accounts.
- A wrong amount is fixed here, with **Re-price at today's fee** or **Unsubscribe**, not by changing the statement. See Fixing mistakes.
- Items to hand out appear in the store's **To hand out** list until they are given to the student.

QUESTIONS

What is the difference between a service and a fee?
A fee on the Fee structure is billed to every active student of a class. A service is billed only to the students subscribed to it.

I changed a service's fee. Why did the students' bills not change?
A new fee never changes bills already made. The page tells you how many of this term's subscriptions are billed at another price. Open **Subscriptions**, choose **Priced differently**, tick them and press **Re-price at today's fee**.

Can a student take the same service twice in a term?
Not as two subscriptions: the page refuses a second one for the same service and term. Use **Quantity** instead, for example 2 sets of books.

Can I delete a service nobody uses any more?
Only if it has no subscriptions, no batch and no bills. Otherwise it stays, because its bills belong to it.

A subscription was made by mistake. How do I take it back?
Open it and press **Unsubscribe**, with a short reason. Everything it billed is credited back to the student's account.

Record a payment and give a receipt

Take money from a parent, print the receipt, find any payment again, and share one payment between brothers and sisters.

For: Bursar, School administrator · app.schooldynamics.ug/help/fees/recording-a-payment

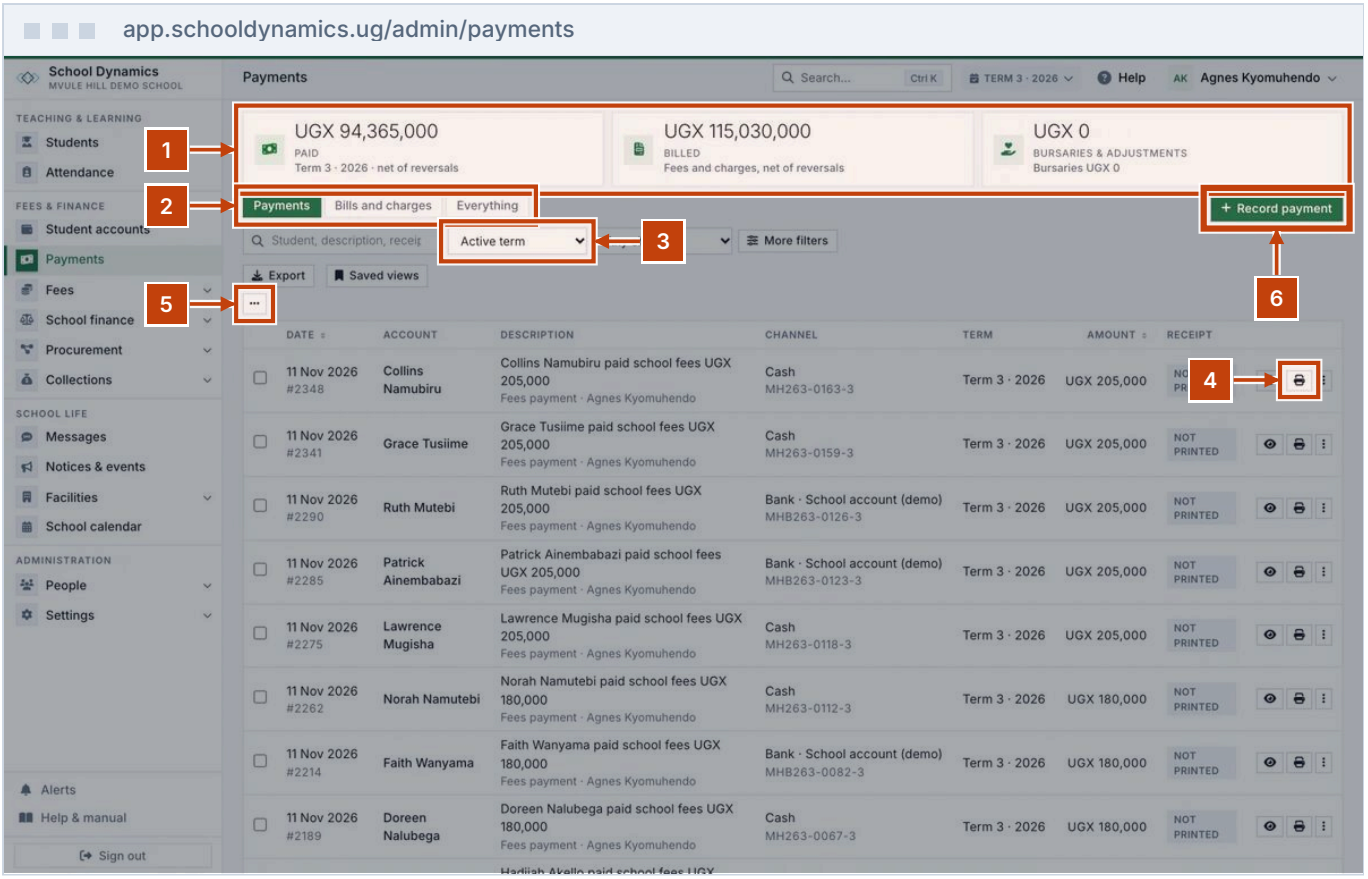
When a parent brings money, you record it once. The student's balance falls at once, and the receipt is ready to print. This lesson also covers finding a payment again, printing receipts in a batch, sharing one payment between brothers and sisters, and the school's bank accounts.

Before you start

- The bursar, the finance officer and the school administrator can record payments. The head teacher and the deputy can see the Payments page but not record anything.
- To record bank payments, the school's bank account must be listed under **Bank accounts & votes** (see The school's bank accounts below).
- Have the slip or receipt in front of you: you need its number.

The Payments page

Open **Fees & finance › Payments**.



The demo school · invented names and figures

1 The term's money in, its bills, and its bursaries and adjustments.

2 Payments, Bills and charges, or Everything.

3 The term shown: the active term unless you choose another.

4 Print this payment's receipt.

5 Deleted transactions, split payments and bank accounts.

6 Record a payment.

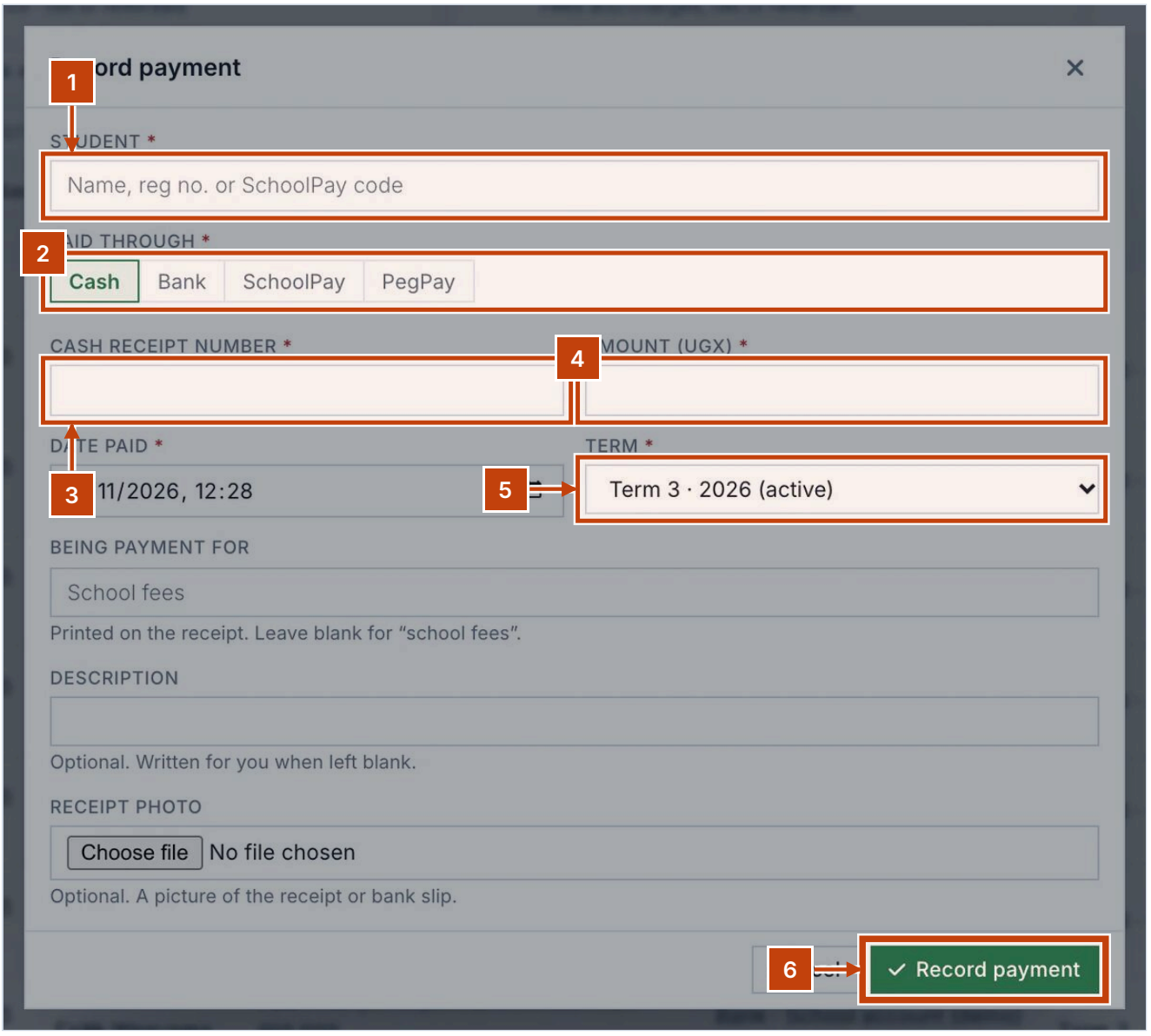
The figures at the top 1 are for the term shown: **Paid** (money in, after any reversals), **Billed** (fees and charges) and **Bursaries & adjustments**. Balances moved from one term to the next are not counted in them.

The tabs 2 show **Payments** (money in), **Bills and charges** or **Everything**. The list starts on the active term 3; choose **All terms** or another term in the list.

- **Search** finds a student, a description, or a receipt or reference number.
- **Any channel** narrows to Cash, Bank, SchoolPay, PegPay, Pesapal and so on.
- **More filters** adds the type of line, dates paid, **Printed** or **Not printed**, a class, and an amount range.
- **Export** downloads every row the filters show, as Excel or CSV. **Saved views** keeps a set of filters for next time.

Click a payment's date or description to open its quick view: the account (with its balance), channel, reference, term, who recorded it, and any reversal or split it is tied to. The printer icon 4 prints that payment's receipt. **More payment pages** 5 leads to **Deleted transactions**, **Split payments** and **Bank accounts & votes**.

Record a payment



The Record payment dialog

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1. Find the student by name, reg no. or SchoolPay code.
2. How the money came: Cash, Bank, SchoolPay or PegPay.
3. The receipt or transaction number. Its name follows the channel.
4. The amount received, in whole shillings.
5. The term it belongs to: the active term unless you change it.
6. Save. The dialog then offers the receipt.

1. Press **Record payment** at the top of the Payments page.
2. In **Student** 1, type at least two letters of the student's name, reg no. or SchoolPay code, and pick the student. Their class, reg no. and balance show. A student who is not active is marked *not active*.
3. Under **Paid through** 2, choose **Cash**, **Bank**, **SchoolPay** or **PegPay**.
4. For **Bank**, choose the **Bank account** the money was paid into.
5. Type the number from the slip 3. The box is named after the channel: **Cash receipt number**, **Bank transaction number**, **SchoolPay receipt number** or **PegPay transaction number**.
6. Type the **Amount (UGX)** 4, in whole shillings.
7. Check **Date paid** (it starts at now) and the **Term** 5 (it starts at the active term).
8. If the payment was not for school fees, type what it was for in **Being payment for** (*Uniform*, *Trip*). It is printed on the receipt; left blank, the receipt says *school fees*.
9. If you like, add a **Description** (it is written for you when left blank) and a **Receipt photo** (a picture of the slip, up to 4 MB).
10. Press **Record payment** 6.

The dialog says *UGX … recorded*, with the transaction number and the student's new balance. Press **Print receipt** to open the receipt, **Record another** for the next payment, or **Close**.

> **TIP**
>
> You do not have to start from the Payments page. **Record payment** is also on **Student accounts**, beside each student in that list, in a student's quick view, on the student's **Fees** tab, and in the search box (Ctrl + K, type the student's name, then **Record payment**). Opened for one student, the dialog has that student already chosen.

When the dialog refuses

The payment is not saved, and a red message in the dialog says why:

It says	What to do
Cash receipt number … is already used.	Each cash receipt number is used once in the school. Search the Payments list for it: the payment may be recorded already.
Bank transaction … is already recorded on …	Each bank transaction number is used once per bank account. Check the slip, and check that you chose the right bank account.
SchoolPay receipt … is already recorded.	That SchoolPay payment is already on an account.
A SchoolPay receipt number is digits only, at least 5.	Type the number exactly as SchoolPay gives it.
Choose the bank account the money was paid into.	Pick the account in **Bank account**. If it is missing, add it first (below).

> GOOD TO KNOW
>
> SchoolPay payments normally arrive on their own (see SchoolPay). If you type one in yourself with its SchoolPay receipt number, the same receipt can never be recorded a second time.

Print receipts

A receipt opens as a PDF in a new tab, on the school's letterhead. Print it from:

- the dialog, straight after saving (**Print receipt**);
- the printer icon beside the payment on the Payments list, or **Receipt** in its quick view;
- the line's menu on the student's statement (**Print receipt**).

The receipt says who paid and how much, in figures and in words, what it was for, how it was paid, the reference, the term and who recorded it. It ends with the student's fees balance (*outstanding*, *Fully paid* or *in credit*) and the bursar's signature, if the school uploaded one under School profile.

To print many at once, tick them on the Payments list and press **Print receipts**. They come as one PDF, four receipts to an A4 page, ready to cut. Up to 200 print at a time.

A printed receipt is marked **Printed** on the list. To find the ones still to print, choose **Not printed** under **More filters**. Printing changes nothing else.

> CAREFUL
>
> The balance on a receipt is the student's balance when you print it, not when the money came in. Print the receipt straight after recording the payment if the parent needs the balance of that day.

One payment for several children

When a parent pays for two or three children with one slip, record the whole amount on one child, then share it out.

1. On the Payments list, open the payment's menu (the three dots) and choose **Split to other students**. (Or open **More payment pages › Split payments** and press **Split a payment**, then find the payment by its transaction number or the student's name.)
2. In **Share it with**, find each brother or sister and add them.
3. Type each child's amount. The dialog shows the **Payment**, what is **Shared out** and what is **Left on the original**.
4. Add **Notes** if useful.
5. Press **Apply split**.

The first child keeps what is left. Each share becomes a payment on the other child's account, in the same term and with the same date. The **Split payments** page lists every split, with the amounts and who received them.

The split is refused when the shares come to more than the payment, when a share is zero, or when the line is not money paid in (a bill, a bursary, an adjustment, a reversed payment, or a share of another split). A payment can be split only once.

> ⚠ **CAREFUL**
>
> There is no way to undo a split, and its amounts cannot be changed afterwards: the payment and its shares are tied together. Check the amounts before you press **Apply split**.

The school's bank accounts

Bank payments are recorded against one of the school's bank accounts. Open **Payments › More payment pages › Bank accounts & votes**.

1. Press **New bank account**.
2. Type the **Name** (*Stanbic – fees*), the **Account number**, and any **Details**.
3. Leave **Status** on **Active**.
4. Press **Add bank account**.

Only **Active** accounts are offered in the payment dialog. The **Payments** column counts the payments recorded against each account. An account with no payments has a bin to remove it. An account with payments is kept: to stop using it, press the pencil, set **Status** to **Not Active** and press **Save bank account**.

The **Chart of accounts** tab lists the school's own accounts and their balances. Votes and budget accounts are managed under **School finance**: see Votes and budget accounts.

What happens next

- The student's balance changes at once, everywhere: Student accounts, the student's page, the reports.
- A payment in the active term for a student who is not active makes them active again (if they have a class).
- If the parent made a promise to pay, it is checked again at once and may turn kept. See Promises to pay.
- When the school has switched on the *Payment received* text, the parent gets an SMS. See Automatic messages.
- Parents who can see the balance find the receipt on the parents' pages. See What parents can do.
- A mistake? Do not record the payment again. See Fixing mistakes.

QUESTIONS

The dialog says the receipt number is already used. What now?
Each cash receipt number can be used once in the school, and each bank transaction number once per bank account. Search the Payments list for the number: the payment is probably recorded already. If it is a different payment, check the number on the slip.

A parent paid by mobile money. Which channel do I choose?
There is no mobile money channel: choose where the money ended up. If the parent paid with the student's SchoolPay code, the payment arrives on its own when the school uses SchoolPay, so do not type it in. If it went to the school's bank account, choose **Bank** and that account. Otherwise choose **Cash**, use your own receipt number, and write *Mobile money* in **Description**.

Can I send the receipt to the parent?
There is no send button. Parents can open their receipts on the parents' pages and in the parents' app when the school shows them the balance. When the school switches on the *Payment received* text, the parent also gets an SMS for every payment.

Does a reprinted receipt show the balance at the time of the payment?
No. A receipt shows the student's fees balance at the moment it is printed. A receipt printed weeks later shows the balance on that day.

I recorded the payment on the wrong student, or with the wrong amount.
Do not record it again. Correct it: see Fixing mistakes.

Student accounts, statements and balances

See who owes what, open one student's account and statement, print it, and choose whose balances parents can see.

For: Bursar, Head teacher, School administrator · app.schooldynamics.ug/help/fees/student-accounts

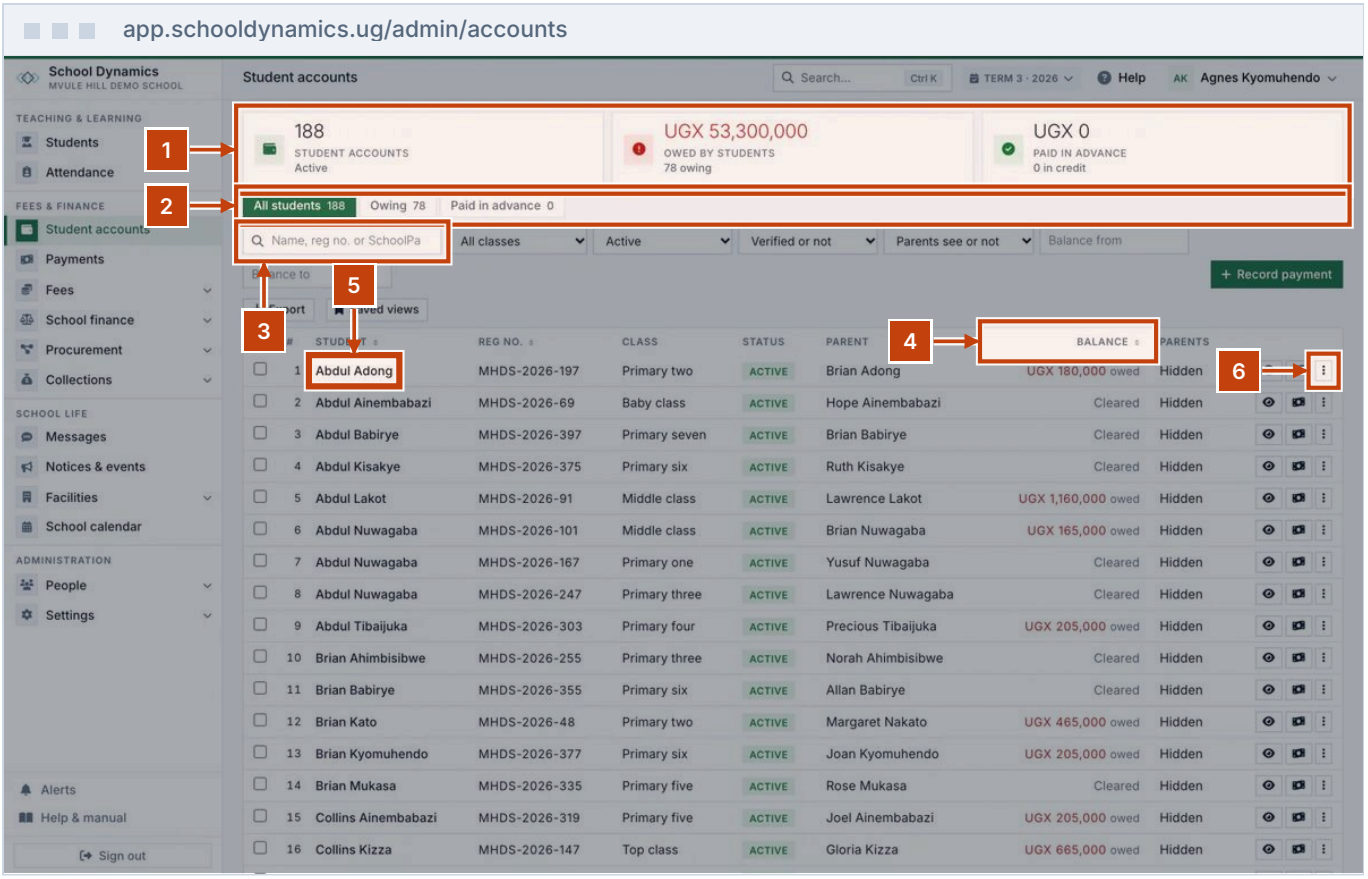
Student accounts lists every student's fees account with its balance. From it you open one student's account: a quick view for a phone call at the counter, or the full statement with every line. Read How fees work first if minus balances puzzle you.

Before you start

The bursar, the finance officer, the school administrator, the head teacher and the deputy can see these pages. Only the first three can record payments, change balances, or choose what parents see.

The list

Open **Fees & finance › Student accounts**.



The demo school · invented names and figures

1 How many accounts, what students owe in all, and what is paid in advance.

2 All students, only those Owing, or those Paid in advance.

3 Find a student by name, reg no. or SchoolPay code.

4 Each balance in words: owed, ahead, or Cleared.

5 Click a name for the account's quick view.

6 Everything else for this account: statement, set balance, parents.

The figures at the top 1 count the accounts the filters show, the total **Owed by students** and the total **Paid in advance**.

The tabs 2 show **All students**, **Owing** (balance below zero) or **Paid in advance** (balance above zero), each with its count.

Narrow the list with:

- the search box 3 : name, reg no. or SchoolPay code;
- **All classes**: one class (grouped by year);
- the status list: **Active** (the default), **Pending**, **Not active** or **Any status**;
- **Verified or not**, and **Parents see or not**;
- **Balance from** and **Balance to**: a range, with minus figures for what is owed. For example, from *-2000000* to *-500000* lists those owing between UGX 500,000 and UGX 2,000,000.

The **Balance** column 4 says each balance in words: *UGX 270,000 owed* in red, *UGX 20,000 ahead* in green, or *Cleared*. Click **Balance** to sort by it. The **Parent** column shows the linked parent's name and phone, or the names and phones kept on the student's record.

Export downloads every account the filters show, as Excel or CSV, with the parent's phone. **Saved views** keeps a set of filters, such as *P.7 owing*, for next time.

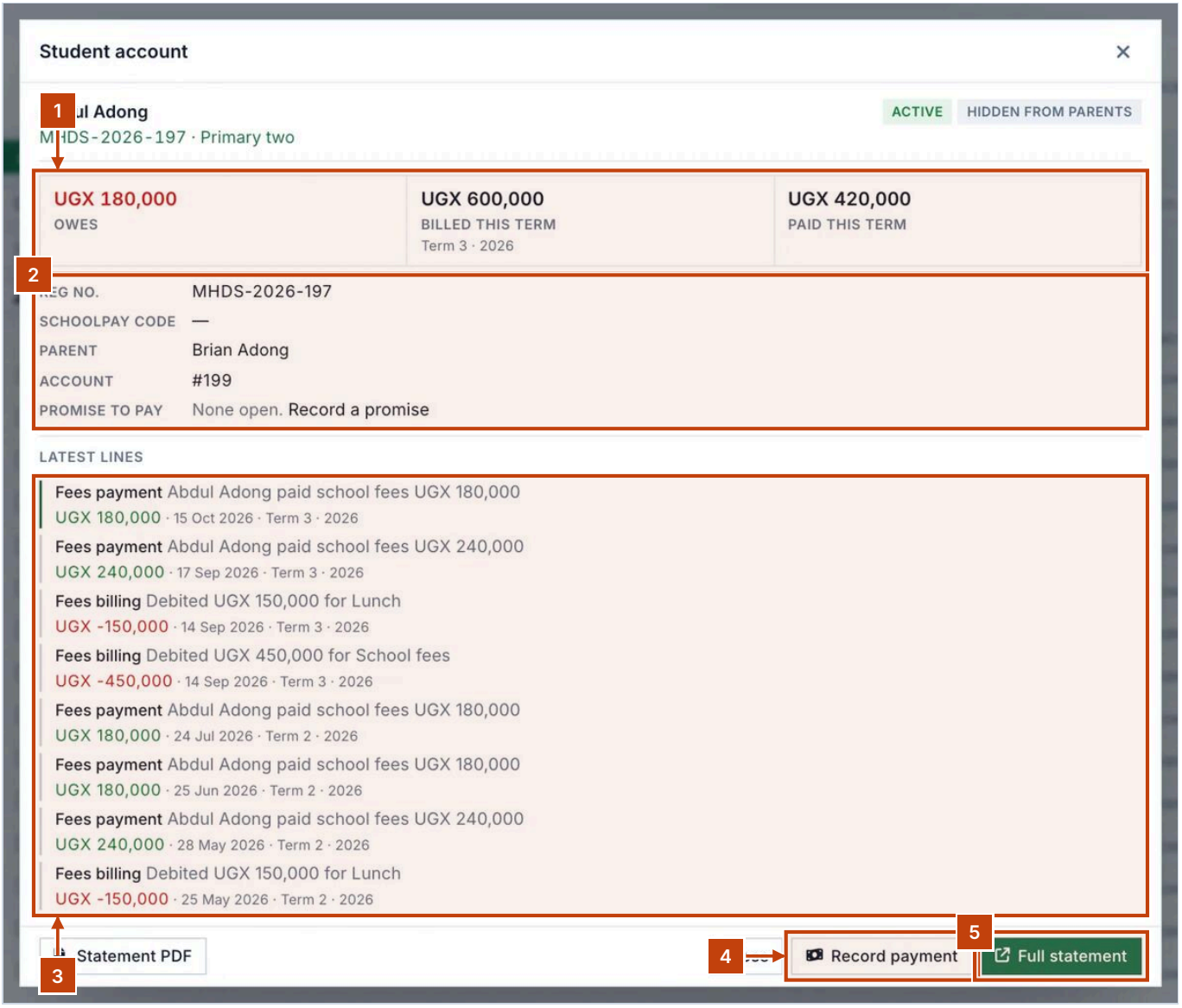
Each row has three buttons: the eye (quick view), the money icon (record a payment, see Record a payment) and the menu 6. The menu has **Quick view**, **Open the account**, **Open the student**, **Statement (PDF)**, **Record a payment**, **Set balance…**, **Recalculate balance**, **Show balance to parents** or **Hide balance from parents**, and **Mark verified** or **Mark not verified**.

Acting on several accounts

Tick the students, and a bar appears: **Show balance to parents**, **Hide from parents**, **Mark verified**, **Mark not verified**, **Recalculate balance** and **Set balance**. Set balance is explained in Fixing mistakes.

The quick view

Click a student's name 5. The quick view opens over the list.



An account's quick view

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1 What the student owes, and this term's bills and payments.

2 Reg no., SchoolPay code, the parent's phone and any open promise to pay.

3 The latest lines on the account.

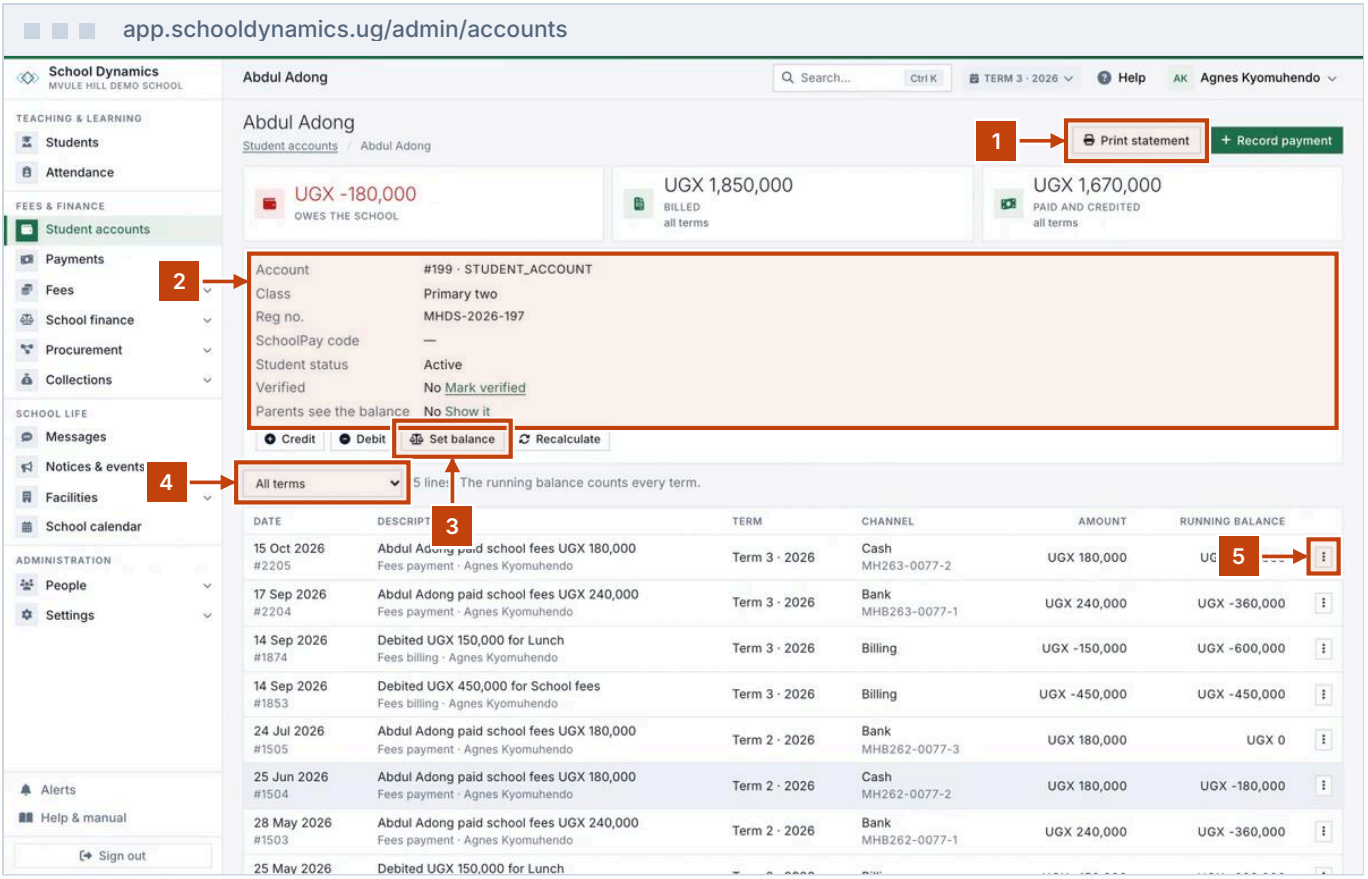
4 Record a payment for this student.

5 Open the full statement.

- The figures 1: **Owes** (or **In credit**), **Billed this term** and **Paid this term** (with any bursary), for the term chosen in the top bar. If some of this term's fees are not billed to the student yet, a red line says how much.
- The facts 2: reg no., SchoolPay code, the parent with a phone number you can tap to call, the account number, and any open promise to pay (with **Record a promise**).
- **Latest lines** 3: the eight newest lines.
- **Record payment** 4 opens the payment dialog for this student. **Statement PDF** prints the statement. **Full statement** 5 opens the account.

One student's account

Full statement, or **Open the account** in the row menu, opens the account.



One student's account

The demo school · invented names and figures

1 The statement as a PDF, for the term chosen below.

2 The student's details, and whether the account is verified and shown to parents.

3 Credit, Debit, Set balance and Recalculate: see Fixing mistakes.

4 All terms, or one term's lines.

5 A line's menu: its receipt, and corrections.

At the top, the balance (**Owes the school** or **In credit**), what was **Billed**, and what was **Paid and credited**. They count all terms, or the one term you choose.

The details 2 give the class, reg no., SchoolPay code and the student's status, and two switches:

- **Verified**: a mark you set when you have checked the account (for example, agreed the balance with the parent). Press **Mark verified** or **Mark not verified**. It changes nothing else.
- **Parents see the balance**: press **Show it** or **Hide it** (see below).

The buttons under them 3, **Credit**, **Debit**, **Set balance** and **Recalculate**, correct the account. They are explained in Fixing mistakes.

The statement lists every line, newest first: date and line number, description (with who recorded it), term, channel and reference, amount, and **Running balance**: the balance after that line, counting every term. Choose a term 4 to see only its lines; the running balance still counts every term. Lines that carry a balance between terms are greyed.

Each line has a menu 5: **Print receipt** (or **Print invoice** for a bill), and the corrections **Edit**, **Change due term**, **Split to other students**, **Reverse** and, for the bursar, **Delete**. See Fixing mistakes.

Print a statement

Press **Print statement** 1. The *Statement of account* opens as a PDF on the school's letterhead: the student, every line with its balance, and the totals billed, paid and credited, and the balance owed. When a term is chosen on the page, the PDF has only that term's lines. You can also print it from the row menu (**Statement (PDF)**) or the quick view (**Statement PDF**); these print every term.

What parents see

Parents see a child's balance, statement and receipts (and which instalments of a payment plan are paid) on the parents' pages and in the parents' app **only** when *Parents see the balance* is on for that account. Otherwise they read: *The school has not shared … fees account online yet. Ask the bursar for the balance and your receipts.*

Switch it on for one account with **Show it**, or for many by ticking them on the list and pressing **Show balance to parents**.

> GOOD TO KNOW
>
> Fee reminder texts and demand notices state the balance whether or not the account is shown to parents: sending them is the school's choice. See Reminders and demand notices.

Recalculate a balance

A balance is always worked out again after every line is added, changed or removed. **Recalculate** (on the account) or **Recalculate balance** (on the list) adds the lines up once more. You rarely need it; use it if a balance does not match the statement.

What happens next

- To see balances by class or for the whole school, with totals, use the reports under **School finance › Finance reports**. See Finance reports.
- To chase what is owed, see Reminders and demand notices and Promises to pay.

QUESTIONS

How do I list everyone who owes?
Open **Student accounts** and choose the **Owing** tab. Narrow it by class, or type a range in **Balance from** and **Balance to** (minus figures, because owing is below zero). **Export** downloads the list.

Why does the list not show students who left?
The list starts on **Active** students. Choose **Not active** or **Any status** in the status list to see the others.

A parent says they cannot see the balance in the app.
The school shows each account to parents one by one. Open the account and press **Show it** beside *Parents see the balance*, or tick several students on the list and press **Show balance to parents**.

Does printing the statement for one term change the balance on it?
No. The lines are that term's, but the balance column still counts every term, so each line shows what the student really owed at that moment.

Fix a payment or a balance that is wrong

Edit, move, reverse or delete a line, credit or debit an account, or set its balance, and what the system refuses and why.

For: Bursar, School administrator · app.schooldynamics.ug/help/fees/fixing-mistakes

A payment or a bill is never typed over. To correct one, you change it, cancel it with an opposite line, or add a line that puts the balance right. Each way leaves a trail with your name and your reason, so the statement always explains itself. Read How fees work first if you have not.

Before you start

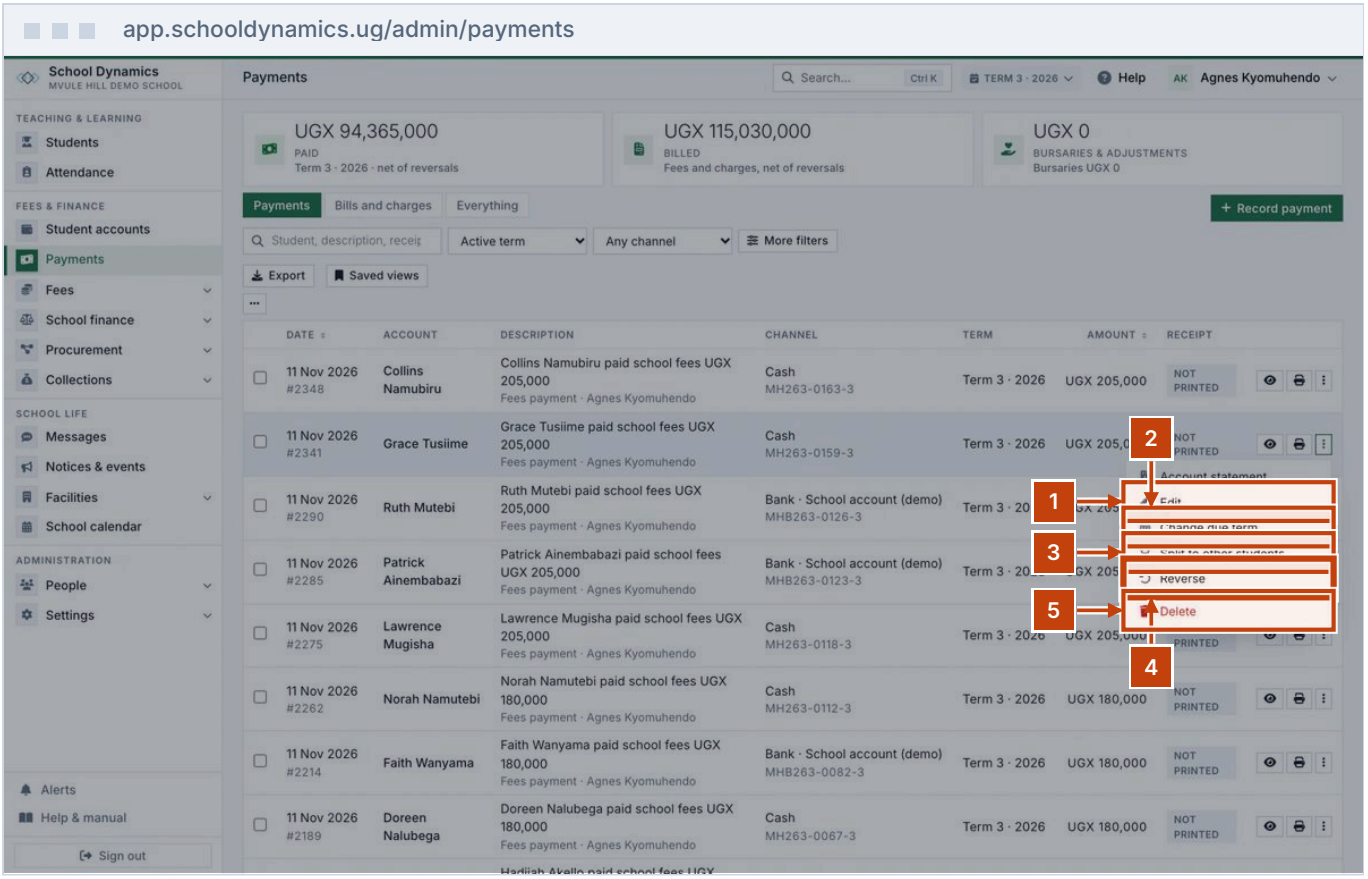
- The bursar, the finance officer and the school administrator can edit a line's wording, date and term, move lines to another term, reverse a line, and credit, debit or set a balance.
- Changing a line's **amount** or **student** is for the bursar (and the school's owner).
- Deleting a line is for the bursar alone.
- The head teacher and the deputy can see everything but correct nothing.

Which fix for which mistake

The mistake	The fix
Wrong description, date or *being payment for*	**Edit** the line
Wrong term	**Change due term**
Wrong student, or wrong amount	The bursar **Edit**s the line. Or **Reverse** it and record it again with a new receipt number
Recorded twice, or never happened	**Reverse** it (the bursar may **Delete** it instead)
One payment was for several children	**Split to other students**: see Record a payment
The balance is wrong as a whole (an old debt, an agreed figure)	**Set balance**, or **Credit** / **Debit**
A class fee was billed at the wrong amount	Correct the fee's bills on the Fee structure
A service was billed wrongly	**Re-price at today's fee** or **Unsubscribe** under Services
A bursary is wrong	Remove the award, then award the right one: see Bursaries

A line's menu

Every line has a menu (the three dots) on the **Payments** list and on the student's statement. The line's quick view (click its date or description on the Payments list) has the same buttons.



A payment's menu on the Payments list

The demo school · invented names and figures

1 Change the wording, date or term. The bursar can also change the amount or the student.

2 Move the line to another term.

3 Share the payment with brothers and sisters.

4 Cancel the line with an opposite one. Both stay on the statement.

5 Bursar only: remove the line. A copy is kept.

Edit a line

1. Open the line's menu and choose **Edit** 1 .
2. Change the **Description**, the **Particulars** (printed on the receipt), the **Date** or the **Term**.
3. If you are the bursar, you can also change the **Amount (UGX)** (plus is money in, minus is a bill or charge) and the **Account** (search for the right student). Then write the **Reason**: it goes to the audit log.
4. Press **Save changes**.

Moving a line to another student changes both balances at once. Anyone else sees *Only the bursar can change the amount or the account of a line.* in place of those boxes.

The dialog refuses to save when:

- nothing was changed (*Nothing was changed.*);
- the description is empty;

- the line is tied to another one. Its amount and student stay as they are, and the dialog says why: it was split, it is a share of a split, it was reversed or it reverses another line, it is a bursary credit, or it carries a balance between terms. Correct the other line (the split's original payment, the bursary award, the carry-forward) instead;
- the line is in a closed period (see What is refused below).

Move lines to another term

A payment entered in the wrong term can move without changing the balance (the balance counts every term). Only the term's figures change.

1. Open the line's menu and choose **Change due term** 2. For many lines, tick them on the Payments list and press **Change due term** above the list.
2. Choose the term in **Move to term**.
3. Press **Move**.

The academic year moves with the term. If any ticked line is in a closed period, none of them moves.

Reverse a line

A reversal cancels a line by posting the opposite amount on the same account, in the same term. Both lines stay on the statement.

1. Open the line's menu and choose **Reverse** 4.
2. Type the **Reason**.
3. Press **Reverse**.

The page says *Transaction #... reversed (#...)*. The new line reads *Reversal of transaction #...* with your reason, and the balance goes back to what it was. On the Payments list, **Paid** counts the payment net of its reversal. The first line's quick view shows **Reversed** and the number of the line that reversed it.

It is refused when the line was already reversed (*This transaction has already been reversed.*), when it is a share of a split payment (correct the original payment), or when it is a balance carried between terms.

> ⚠ CAREFUL
>
> Reversing does not free the receipt number: the first line is still there. To record the payment again, use a new receipt number, or ask the bursar to edit the first line instead.

Delete a line (bursar)

Delete only what should never have existed, such as a test entry. Reversing is clearer.

1. Open the line's menu and choose **Delete** 5.

2. Type the **Reason**.
3. Press **Delete and archive**.

The line leaves the account, the balance is worked out again, and a copy goes to **Deleted transactions** with your name, the time and your reason. Its receipt number can then be used again.

Deleting is refused when the line was reversed (*Delete the reversal first, or leave both: together they already cancel out.*), when it was split (its shares are on other students' accounts), or when it is a share of a split. Anyone who is not the bursar sees *Only the bursar can delete a transaction.*

Deleted transactions

Open **Payments › More payment pages › Deleted transactions**. Every deleted line is listed with when it was deleted and by whom, the account, description, channel, term, amount and reason. Search by student, description, reason or receipt, and filter by term, channel, type, dates and amount. These lines count in no balance. They cannot be changed or brought back.

Credit or debit an account

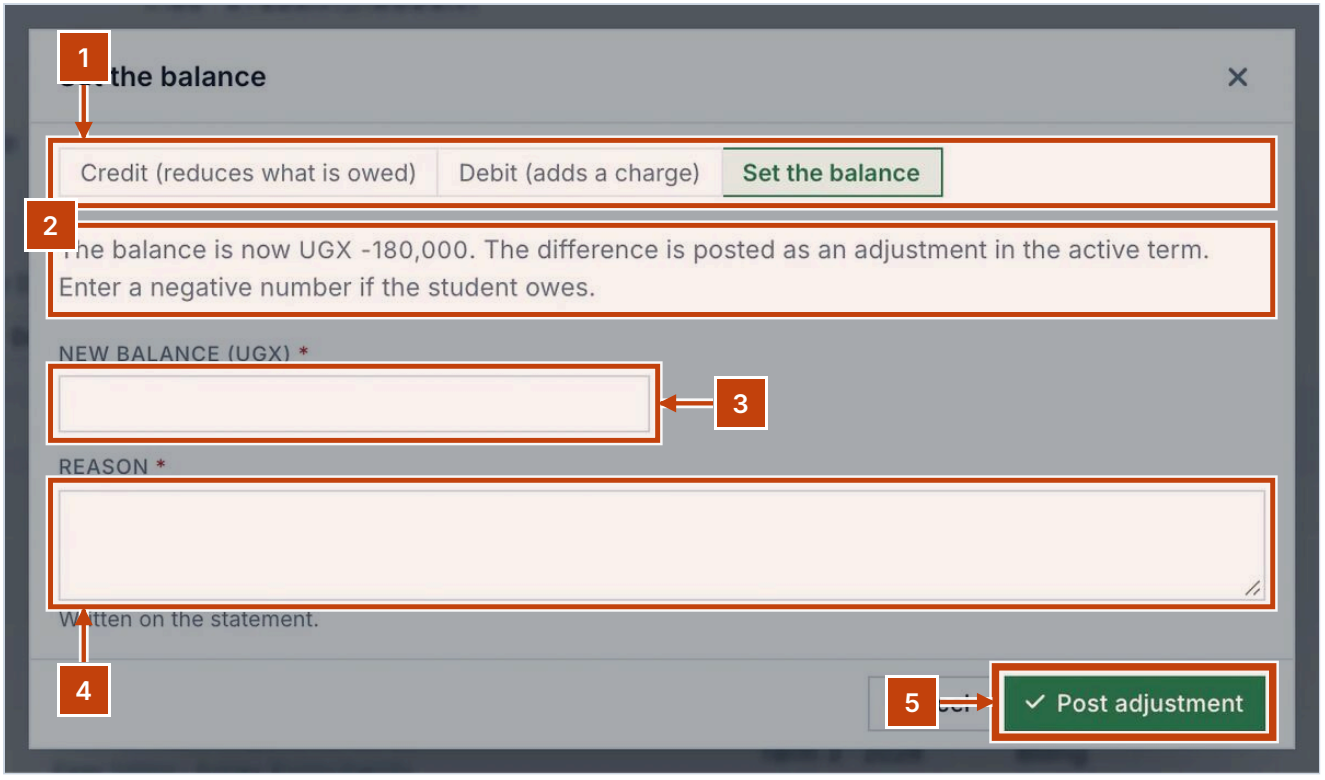
For a correction that is not tied to one payment, such as a discount the head teacher agreed or a charge for a broken window:

1. Open the student's account (see Student accounts).
2. Press **Credit** (it lowers what is owed) or **Debit** (it adds a charge).
3. Type the **Amount (UGX)** and choose the **Term**.
4. Type the **Reason**. It is written on the statement.
5. Press **Post adjustment**.

The line reads *Credit: …* or *Debit: …* with your reason. It is an adjustment: the reports count it apart from payments and bills, so it never inflates the fees collected.

Set a balance

When you know what the balance should be, such as an old debt from before the school used School Dynamics, or a figure agreed with the parent, set it.



Setting a student's balance

The demo school · invented names and figures

1 Credit, Debit, or Set the balance.

2 The balance now. The difference is posted in the active term.

3 The new balance. A minus figure means the student owes.

4 Why. It is written on the statement.

5 Post one adjustment line for the difference.

1. Open the student's account and press **Set balance**. The dialog opens on **Set the balance** 1 and shows the balance now 2.
2. Type the **New balance (UGX)** 3. **A minus figure means the student owes**: for UGX 300,000 owed, type *-300000*. For in credit, type a plus figure. For cleared, type *0*.
3. Type the **Reason** 4.
4. Press **Post adjustment** 5.

One adjustment line is posted, in the active term, for the difference. It reads *Balance set to UGX … (was UGX …): your reason*. Nothing else on the statement changes. If the balance is already that figure, nothing is posted and the dialog says so.

You can also set a balance from the **Student accounts** list: **Set balance…** in a student's menu, or tick several students and press **Set balance**, type the **New balance (UGX)** and **Why**, then press **Set balances**. Every ticked account is brought to that one figure; those already at it are left alone, and the page says how many changed.

> ⚠ **CAREFUL**
>
> On the web, the difference is worked out when you press the button. If a payment reaches the account while the dialog is open, the balance still ends at the figure you typed, and that payment no longer lowers it. Look at the latest lines just before you set a balance.
>
> The phone app checks this for you: if the balance changed after you looked, it changes nothing and says *The balance has changed to … since you saw …*. Look again and choose.

What is refused, and why

- **Closed periods.** When the school has closed its books up to a date (see Books of account), a line dated on or before it cannot be edited or moved to another term, and no line's date can be moved into that period. The dialog says *The books are closed up to …*. Date the correction after that day, or ask whoever keeps the books to reopen them.
- **Tied lines.** A split payment and its shares, a reversal and what it reverses, a bursary credit, and the lines that carry a balance between terms keep their amount and student. Correct the line they depend on.
- **A fee is billed to a student once.** A bill cannot be moved onto a student who already has that fee (*This fee is already billed to this account.*).
- **Receipt numbers are used once.** A cash receipt number once per school, a bank transaction number once per bank account, a SchoolPay receipt once in all of School Dynamics.

What happens next

- Every correction (edit, move, reversal, adjustment, deletion) is written in the school's audit log with who, when and the reason.
- Balances follow at once, on every page and report.
- Parents who can see the balance see the new lines on the parents' pages.

QUESTIONS

I recorded a payment on the wrong child. What do I do?
The bursar opens the payment's **Edit** and changes the **Account** to the right child, with a reason. Both balances follow. If no bursar is available, reverse it and record it again on the right child with a new receipt number: the old number stays used.

Why can I not record the payment again after reversing it?
A reversal adds an opposite line; the first line stays, with its receipt number. The same cash receipt or bank transaction number cannot be used twice. Record it with a new number, or ask the bursar to correct the first line instead.

Should I reverse or delete?
Reverse. Both lines stay on the statement, so anyone can see what happened. Delete only a line that should never have existed, such as a test; only the bursar can, and a copy is kept in **Deleted transactions**.

Can a deleted line be brought back?
No. **Deleted transactions** shows it, with who deleted it, when and why, but it cannot be restored. Record it again if it was deleted by mistake.

How do I enter an old debt from before we used the system?
Open the student's account and press **Set balance**, type what they owed as a minus figure (UGX 300,000 owed is -300000) and say why. For many students at once, use a fees import.

SchoolPay payments

How payments made with a student's SchoolPay code reach their account, and what to do with the ones that match no student.

For: Bursar, School administrator · app.schooldynamics.ug/help/fees/schoolpay

Parents pay school fees through SchoolPay, at a bank or by mobile money, quoting the student's SchoolPay code. School Dynamics fetches those payments, finds the student each one is for, and records it on the student's account as a payment. The SchoolPay pages show every payment SchoolPay sent, and let you deal with the few that match no student.

Open them from **Fees & finance › Fees › SchoolPay**. The five pages sit side by side at the top: **Payments**, **Students**, **Reconcile with the ledger**, **Upload a statement** and **Sync log**.

Before you start

- **School Dynamics switches SchoolPay on** for your school and enters its SchoolPay code and password. If the page says *SchoolPay is switched off for this school* or *switched on but not connected*, ask School Dynamics support (Getting help).
- **Two choices are the school's own.** Open **School profile**, the **SchoolPay** tab, and press **Edit**:
  - **Import SchoolPay payments automatically**: *Yes*, or *No, I import them myself*.
  - **Import payments from**: payments made before this date are not imported.

  Only the school administrator and the school's owner can change them.
- **The school needs an active term.** Every payment is recorded in a term, so without one nothing can be fetched, uploaded or imported.
- **Who can do what.** The head teacher, deputy, bursar, finance officer and school administrator can see the SchoolPay pages. Only the bursar, finance officer and school administrator can fetch, import, choose a student, register a student or upload a statement.

How a payment reaches the student's account

1. A parent pays at a bank or on mobile money with the student's SchoolPay code.
2. School Dynamics asks SchoolPay for the school's payments on a schedule, one day at a time: today, then a day further back, then today again, reaching 60 days back, so late payments are picked up too. SchoolPay can also send each payment the moment it is made, when School Dynamics has set this up for your school.
3. Each new payment is stored as **Not imported**. A receipt that is already here is skipped.
4. Importing records it on the account of the student who holds that payment code, dated when it was paid. When no student holds the code, the student with the same reg no. gets it; if that student has

no code yet and no other student holds this one, the code is saved on them.

5 A payment that matches no student goes to **Errors** and waits for you.

When the school imports automatically, step 4 happens straight after step 3. Otherwise new payments wait under **Not imported** until you import them.

The Payments page

The tiles at the top count the payments **Waiting to import**, those that **Need a student**, and those **Imported**, with their totals. **Last fetched from SchoolPay** says when SchoolPay was last asked; click it to open the sync log.

The tabs **Not imported**, **Errors**, **Imported** and **All** split the list. Search by receipt, payment code, reg no. or name, and narrow it by the dates paid, the channel, the reason (on **Errors**), **Matched or not**, one student's account, or the amount. **Clear** removes the filters.

Each row shows when it was paid, the SchoolPay receipt, the name, code, reg no. and class SchoolPay sent, the channel, the amount, the student's fee balance (once the payment is on an account) and the status. Under the status:

- an imported payment links to the student's account;
- a payment in **Errors** says why;
- a payment still waiting shows the student it would go to (→ *name*), or *No student matches yet*.

Click the name, or the eye, to see the payment's details: who it belongs to, everything SchoolPay sent, and the raw message.

Import waiting payments

- **All of them:** press **Import all waiting** at the top and confirm. Each goes to the student holding its payment code (or reg no.); those that match nobody move to **Errors**.
- **One:** open the row's menu and choose **Import**. In the details, the same button says **Import to** and the student's name.
- **Some:** tick them and press **Import ticked**.

A message then says how many were imported, how many were already in the ledger and how many could not be imported. While a long import runs, a progress bar shows on the page.

> GOOD TO KNOW
>
> When several students hold the same payment code, the payment goes to the first one registered, and the details warn you. To find students who share a code, filter the › **Students** list by **Code shared with another student**.

Payments that need a student

A payment lands in **Errors** for one of these reasons (the **Any reason** filter lists them): *No student matches*, *Already in the ledger*, *No fees account*, *Refused by the ledger*, or *Other*. Most are the first: the parent used a code no student in School Dynamics holds yet.

To give the payment to the right student:

1. Open the row's menu and choose **Choose the student...**.
2. In **Student**, search by name, reg no. or payment code. Any student of the school can be chosen, including those who have left. Their class, reg no. and payment code show below.
3. When the student has no payment code, a box offers to **Also save payment code ... on** them, so their next SchoolPay payments are imported by themselves. Leave it ticked unless the code is wrong.
4. Press **Import to this student**. The payment is recorded on their account, dated when it was paid.

If you corrected students' payment codes or reg nos. on their own pages instead, open **Errors** and press **Try all errors again**.

Fetch payments now

The schedule fetches payments by itself. To fetch a few days at once (after SchoolPay was unreachable, say), press **Sync now**. It is greyed out while SchoolPay is not switched on and connected.

1. Choose **From** and **To**, or press **Today**, **Last 3 days**, **Last 7 days** or **Last 14 days**.
2. Tick **Import the new payments into students' accounts straight away** if you want them imported at once. It starts ticked when the school imports automatically.
3. Press **Fetch from SchoolPay**.

You can fetch at most 14 days at a time, never a day in the future and never before the school's **Import payments from** date. Payments already here are skipped, so fetching a day twice adds nothing.

Register students from their codes

Students lists every payment code in the school's SchoolPay payments: the name and class SchoolPay has, how many payments and how much, and whether a student holds the code (**Registered** or **Not registered**). To check a code nobody has paid with yet, type it in **Look up any payment code** and press **Look up**.

Press **Register** beside a code (or **View** when it is registered). The dialog shows what SchoolPay has for the code, then the student's details, filled from SchoolPay where it can:

1. Check the names, and choose **Sex**, **Status** and **Class**. The class must be one of this year's classes; the hint says the class SchoolPay has.

2 Leave **Reg no.** blank to have one given to an active student.

3 **Password** is for signing in. Left blank, one nobody knows is set; **Use the code** fills in the payment code.

4 Press **Register the student** (or **Save changes** for a student who already holds the code).

If a student with a similar name is already registered, they are named and linked. Check them, then tick **Register anyway** only if this really is a different student. Once saved, the dialog offers **Their payments**, **Open the student** and an **Admission letter**.

Then go back to **Payments**, open **Errors** and press **Try all errors again**, so the payments waiting for this code are imported. To register many students at once, use Importing students.

Reconcile with the ledger

Reconcile with the ledger compares what SchoolPay reported with the SchoolPay payments on students' accounts. Choose **By day** (a date range of up to 3 months; **Last 7 days**, **Last 30 days**, **Last 3 months**) or **By term**. Tick **Only days that differ** to hide the days that agree.

The tiles give the totals **From SchoolPay** and **In the ledger**, the difference, and the money **Not yet imported**. Each day's row has its counts and totals; click a day to see its payments.

Below, **Payments that disagree** sorts the differences into four tabs:

Tab	Means
Marked imported, not in the ledger	SchoolPay's list says imported, but no account has the receipt. Usually the line was deleted later. Check the student's statement before recording it again.
In the ledger, still marked waiting	The payment is already on an account but still listed as waiting. Press **Mark them imported**: nothing is posted.
Amounts differ	The account's line has another amount: a payment split to other students, or changed by hand.
In the ledger, not from SchoolPay	Lines recorded as SchoolPay payments that SchoolPay's list does not have, such as payments typed in on the Payments page.

Upload a statement

When SchoolPay cannot be reached, or for payments from before the fetching started, upload the statement SchoolPay gives you. Press **Upload a statement**:

1 **The file.** Choose the **Statement** (Excel or CSV, up to 10 MB, with the column headings in the first row) and what it was **Paid through** (*SchoolPay*, *PegPay* or *Other*). Press **Next: the columns**.

2 **The columns.** Each column is guessed from its heading; check them. **Payment date**, **Amount**, **Receipt number**, **Payment code** and **Student name** are needed. Press **Next: check**.

3 **Check and add.** You see how many payments are new, already here, and cannot be read, with the first rows. The last button adds the new ones and says how many (**Add 25 payments**, for example). Press it.

Uploaded payments join **Not imported**, even when the school imports automatically: import them on the Payments page. The upload stays in the list; **Run again** adds any payment from it that is not here yet.

The sync log

Sync log lists every time SchoolPay was asked for the school's payments: which day, how many days back, and SchoolPay's answer. Failures are in red; **Failures** shows only them. The tiles above say whether SchoolPay is on and connected, whether payments import by themselves, and from which date the school takes payments.

Good to know

- Imported payments carry SchoolPay's receipt number and the payment's own date. **Fix descriptions & dates** (tick imported payments on the **Imported** or **All** tab) rewrites their description and date from what SchoolPay sent. Amounts and accounts never change.
- A payment in the active term on a student marked *not active* makes them active again, as long as they still have a class.
- SchoolPay payments show on the › **Payments** list and on each student's account like any other payment. See How fees work.

QUESTIONS

Why is a payment under Errors?
Usually because no student in the school holds the payment code or reg no. SchoolPay sent. Open the payment and press **Choose the student**, or correct the student's code and press **Try all errors again**.

If I fetch the same day twice, is a payment recorded twice?
No. A receipt that is already here is skipped, whether it came from the schedule, **Sync now** or an uploaded statement.

Which term does a SchoolPay payment go into?
The term that was active when the payment reached School Dynamics, not the term of the date it was paid.

A payment went to the wrong student. How do I move it?
If it is not imported yet, use **Choose the student**. If it is already on the wrong account, correct it there: see Fixing mistakes.

Can I switch SchoolPay on myself?
No. School Dynamics switches it on and enters the school's SchoolPay code and password. You choose only whether payments import by themselves and from which date.

Online payments with Pesapal

Let parents pay fees online through the school's own Pesapal account, follow each payment to the student's account, and send a parent a pay link.

For: Bursar, School administrator · app.schooldynamics.ug/help/fees/online-payments

Parents can pay school fees online, with mobile money or a card, through the school's own Pesapal account. The money goes straight to the school's account. School Dynamics checks each payment with Pesapal, then records it once on the student's account as a payment, with a receipt the parent can download at once.

Two pages do this:

- **Settings › Online fees payments** connects the school's Pesapal account and switches online payment on for parents.
- **Fees & finance › Collections › Online payments** lists every payment parents started, and gives you a pay link for any student.

Before you start

- The school needs a **Pesapal merchant account** in its own name, with two pairs of keys from Pesapal: a *sandbox* (testing) consumer key and secret, and a *live* one.
- School Dynamics must also allow online payment for the school. Until it does, the settings page says *Online payment is not switched on yet*: you can save the keys, but nothing is sent to Pesapal.
- **Who can do what.** The bursar, the school administrator and the school's owner can connect the account. The head teacher, deputy, bursar, finance officer and school administrator can see the payments; only the bursar, finance officer and school administrator can press **Ask Pesapal**.

Connect the school's Pesapal account

You test with sandbox keys first, then with live keys, and only then switch on.

1. Open **Settings › Online fees payments**.
2. Press **Enter Pesapal keys**.
3. Under **These keys are for**, choose **Sandbox (testing)**. Paste the **Consumer key** and the **Consumer secret**, then press **Save keys**.
4. Press **Test the connection**. A message says whether Pesapal accepted the keys.
5. If you want to see a whole payment without real money, press **Try a test payment**. It opens Pesapal's sandbox page. Test payments are listed under **Test payments** and never reach a student's account.
6. Press **Change keys**, choose **Live**, paste the live key and secret, and press **Save keys**.
7. Press **Test the connection** again.
8. Press **Switch on for parents**.

The card **The school's Pesapal account** then shows **Parents can pay online: Yes**, which keys are saved, when they were tested, when the sandbox test passed, and the last problem Pesapal reported, if any.

> ⚠ CAREFUL
>
> Changing the keys, or changing between sandbox and live, switches online payment off at once. Parents cannot pay until the new keys pass **Test the connection** and you press **Switch on for parents** again. To keep a saved key or secret, leave its box empty.

Switch on for parents refuses until everything is ready, and says what is missing:

- *Test the connection with your Pesapal sandbox keys first.*
- *These are sandbox keys. Enter your live Pesapal keys, test them, then switch on.*
- *Test the connection with these live keys first.*

To stop online payment, press **Switch off** and confirm. Pay links then tell parents to pay through SchoolPay or at the school. Payments already started are still followed up.

How a parent pays

The parent opens the student's pay link: from the parents' app, the parents' pages, or a link you send. They type the amount and their name, and pay on Pesapal's page. The parent's side is in Paying fees online.

School Dynamics never trusts the parent's return or Pesapal's notice alone: it asks Pesapal for the payment's status. Only when Pesapal says it is completed, in shillings, is the payment recorded on the student's account: once, for the amount Pesapal confirms, in the active term. What the student owes falls straight away (see balance).

Follow the payments

Online payments shows three tiles: **Paid online this month**, **Waiting for Pesapal** and **Need a look**. Search by student, payer or reference, and filter by status. Each row shows when the payment started, the student, the payer, the amount, the status and, once it is recorded, its line number. Click the number to open the receipt. Sandbox test payments show as *Test payment* with a **Sandbox** badge.

Status	Means
Started	The parent began, but Pesapal has not accepted the order yet.
Waiting for Pesapal	Pesapal has the order; the parent may not have finished paying.
Paid	Pesapal confirmed it, and it is on the student's account.
Failed	Pesapal said it failed, or it could not be started.
Not completed	A day later, Pesapal still says it was not completed.
Reversed	Pesapal reversed it. If it was already recorded, it is reversed on the student's account too, once.

Click a student's name, or the eye, to see the payment: the amount asked and the amount **Confirmed by Pesapal**, who paid and how, Pesapal's confirmation and order numbers, when Pesapal was last asked, and the line it became.

Ask Pesapal (in the row, or in the details) asks Pesapal again about a payment that is not recorded yet. If Pesapal now says it is paid, it is recorded at once. A payment Pesapal never accepted cannot be asked about.

A payment marked **Need a look** has a note that says why, for example:

- Pesapal confirmed less than the amount asked: the confirmed amount was recorded.
- Pesapal confirmed an amount in another currency: nothing was recorded. Check it in the Pesapal account and record it by hand (Record a payment).
- The school changed its Pesapal keys after the payment started: check it in the Pesapal account it was made with.

Send a parent a pay link

1. On **Online payments**, press **Pay link for a student**.
2. Search for the student by name, reg no. or SchoolPay code, and choose them.
3. Press **Copy**, then paste the link into a text or a WhatsApp message to the parent.

The dialog says how many days the link works. A link cannot be changed to open another student. While online payment is off, the link still opens, but tells the parent to pay through SchoolPay or at the school.

Good to know

- Each payment is recorded once, even when Pesapal's notice, the parent's return and your **Ask Pesapal** arrive together.
- Online payments show on the › **Payments** list and on the student's account like any other payment. If one needs correcting, see Fixing mistakes.

QUESTIONS

Does the money pass through School Dynamics?
No. Parents pay into the school's own Pesapal merchant account. School Dynamics only records each payment on the student's account once Pesapal confirms it.

A parent says they paid, but the balance has not moved. What do I do?
Find the payment under **Fees & finance › Collections › Online payments**. If it says *Waiting for Pesapal*, open it and press **Ask Pesapal**. If Pesapal now says it is paid, it is recorded on the student's account at once.

Can I see the Pesapal keys again?
No. They are kept encrypted; only the end of the consumer key is shown. To use other keys, press **Change keys**. Online payment then stays off until the new keys are tested.

What happens to pay links when online payment is off?
The link still opens, but the page tells the parent to pay through SchoolPay or at the school.

Give a bursary

Set up bursary schemes, award one to a student or a whole class for a term, and take an award back if it was a mistake.

For: Bursar, Head teacher, School administrator · app.schooldynamics.ug/help/fees/bursaries

A bursary lowers what a student owes. You set up a **scheme** once (a name and a fixed amount per student), then award it to students for a term. Each award puts the scheme's amount on the student's account as a credit, so their balance goes up by that much and they owe less.

Open it from **Fees & finance › Fees › Bursaries**. The page has two tabs: **Beneficiaries** (who has a bursary) and **Schemes**.

Before you start

- The bursar, the finance officer and the school administrator can make schemes, award them and remove awards. The head teacher and the deputy can see the page but cannot change anything.
- A scheme must have an amount above zero before you can award it.

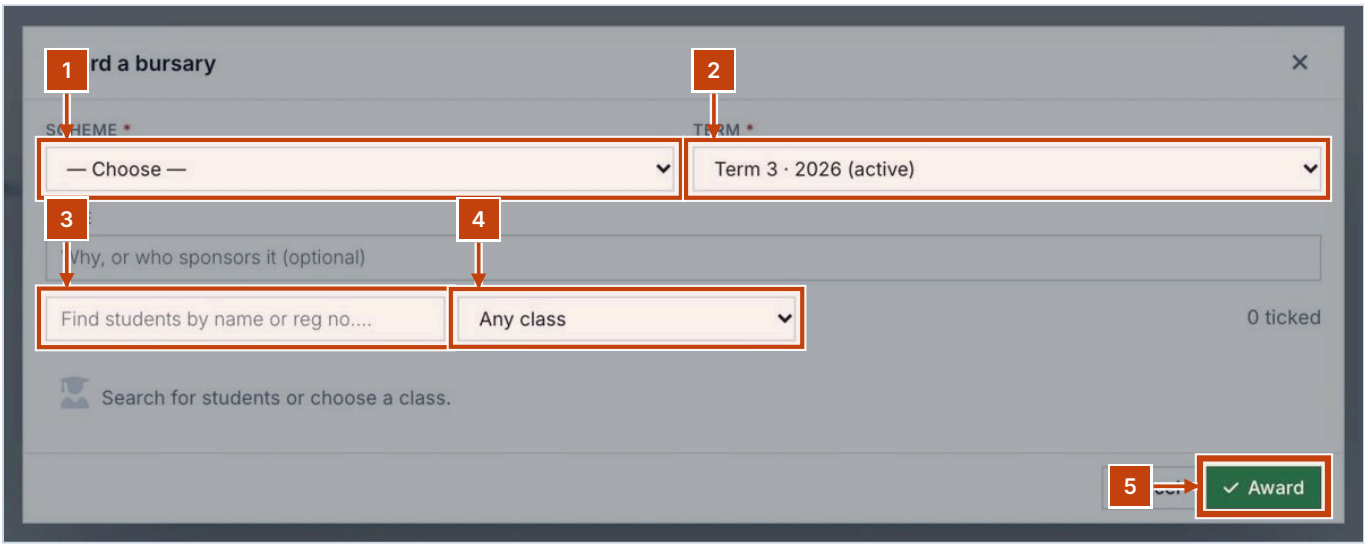
Make a scheme

1. Open the **Schemes** tab.
2. Press **New scheme**.
3. Type the **Name**, for example *Staff children bursary*.
4. Type the **Fund per beneficiary (UGX)**: the amount each student gets per award.
5. Choose the **Offer**: *Termly offer* or *One-time offer*.
6. Add a **Description** if it helps (who sponsors it, the conditions).
7. Press **Add scheme**.

The **Offer** is a label for you. A termly bursary does not renew by itself: you award it again each term.

The **Schemes** tab lists each scheme with its offer, its fund per beneficiary, how many students hold it in the term chosen at the top, and how much it credited in that term. Its buttons award the scheme, edit it, or delete it. A scheme can be deleted only while nobody holds it. Otherwise the page says how many awards it has: remove them first.

Award a bursary



The demo school · invented names and figures

1 The scheme, with the amount each student gets

2 The term the bursary is for

3 Find students by name or reg no.

4 Or show a whole class, then tick the students

5 Award: each ticked student's account is credited

1. On the **Beneficiaries** tab, press **Award bursary**. (On the **Schemes** tab, the hand icon on a scheme's row opens the same dialog with that scheme chosen.)
2. Choose the **Scheme** 1. Each scheme shows the amount it gives.
3. Choose the **Term** 2. It starts on the term chosen at the top of the page, or the active term.
4. Type a **Note** if you want: why, or who sponsors it.
5. Find the students: type a name or reg no. 3, or choose a class 4. Only active students are listed.
6. Tick each student, or press **Tick all shown**.
7. Check the line under the list: *Each ticked student is credited UGX 300,000 — UGX 1,500,000 in all.*
8. Press **Award** 5.

A message says how many students were awarded and the total, for example *Awarded 5 students: 5 credits, UGX 1,500,000.* Each student's account gets a line such as *Bursary funds of UGX 300,000 deposited to account by Staff children bursary bursary scheme for Term 2 · 2026.*

A student can hold a scheme only once per term. A student who already holds it for that term is greyed out in the list with *Already holds this scheme this term*, and cannot be ticked.

The list of beneficiaries

The **Beneficiaries** tab shows every award for the term chosen at the top. It starts on the active term; choose **All terms** to see every term. You can also search by name or reg no., and show one scheme only.

Each row shows the student, their class, the scheme, the term, what the award **Credited**, and the student's balance now: *owed* in red, or *ahead* in green when they have paid more than they were billed. Click a student's name to look at their fees without leaving the page.

Export gives every row the filters show as Excel or CSV. **Saved views** keeps a set of filters you use often.

Remove an award

If a bursary was given by mistake, remove the award. Do not try to edit the line on the student's account.

1. On the **Beneficiaries** tab, press the remove icon at the end of the student's row.
2. Read the dialog. It names the student, the scheme and the term, and says how much is taken back from the student's account: exactly what this award credited.
3. Press **Remove award**.

To remove several at once, tick them in the list, press **Remove ticked awards...**, check the table of what each one gives back, and press the button at the foot (for example **Remove 4 awards**). You can remove up to 200 at a time. If one cannot be removed, the message names it and the others are still done.

> ⚠ CAREFUL
>
> Removing an award takes its money back off the student's account, so the student owes more again. Tell the family before you do it.

Some awards were made before School Dynamics linked each award to its credit. For those, the credit is found by the scheme's name and the term, and the dialog says so. If no credit can be found, nothing is taken back and the dialog says *No credit was found for this award, so nothing is taken back.*

Good to know

- An award is a credit on the student's account in the award's term. It is not a payment and needs no receipt.
- Changing a scheme's fund never changes awards already made. The message after saving says so: *Scheme updated. Awards already made keep what they were credited.*
- A scheme with a fund of UGX 0 cannot be awarded. The dialog says to set the fund per beneficiary first.
- Every scheme saved or deleted, award made and award removed is written in the school's audit log.

QUESTIONS

Can a bursary be a percentage of the fees?
No. A scheme gives every student the same fixed amount, its **Fund per beneficiary**. For different amounts, make one scheme for each amount, for example *Half bursary* and *Full bursary*.

Does a termly bursary renew by itself next term?
No. Nothing is awarded on its own. At the start of each term, award the scheme again to the students who keep it.

I changed a scheme's fund. Did the students' accounts change?

No. Awards already made keep what they were credited. The new fund is used for awards made from now on. The list shows *fund now* under an award whose scheme has changed since.

Can I edit the bursary line on a student's account?

Not its amount or its account. Remove the award (that takes back exactly what it credited), then award again with the right scheme.

Do bursaries count as payments in the reports?

No. The finance reports count bursaries under their own heading, apart from payments, so the money collected is never inflated by bursaries.

Promises to pay

Record a parent's promise to pay by a date. It turns kept or overdue by itself as payments arrive; remind the parent or send a demand notice when it is missed.

For: Bursar, Head teacher · app.schooldynamics.ug/help/fees/promises-to-pay

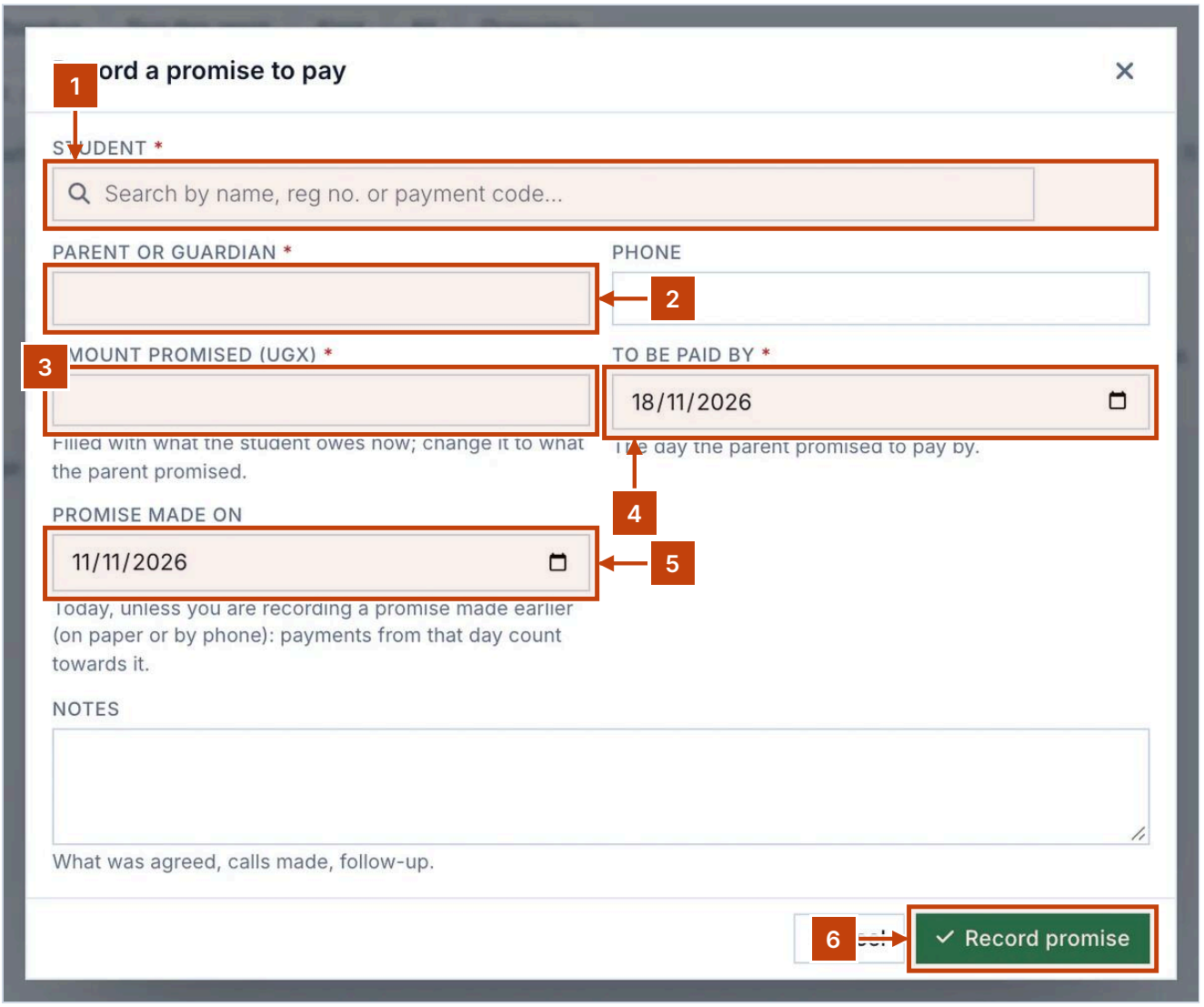
When a parent cannot pay now, they often promise a date: *"I will bring UGX 300,000 by Friday."* Record that promise to pay here. The system then watches the student's payments. The promise turns **Kept** when enough has been paid, or **Overdue** when the date passes first. You follow up the overdue ones by phone, by SMS or with a demand notice.

Open it from **Fees & finance › Fees › Promises to pay**. It is also a tab of **Finance reports**.

Before you start

- The bursar, the finance officer and the school administrator record and follow up promises. The head teacher and the deputy can see everything on the page but cannot change it.
- Reminders by SMS are sent by the bursar or the school administrator, and are paid from the school's SMS wallet. See How SMS works.

Record a promise



The demo school · invented names and figures

1 Find the student by name, reg no. or payment code.

2 Filled from the student's record. Change it if someone else made the promise.

3 Filled with what the student owes now. Change it to the amount promised.

4 The day the parent promised to pay by.

5 Today, or the day an earlier promise was made (up to 90 days back).

6 Save the promise.

1. Press **Record a promise**.
2. Find the student 1: type part of the name, the reg no. or the payment code, then pick them. A line under the box says what the student owes now, over every term.
3. Check **Parent or guardian** and **Phone** 2. They are filled from the student's record. Change them if someone else made the promise.
4. In **Amount promised (UGX)** 3, type the amount the parent promised. It starts as everything the student owes.
5. In **To be paid by** 4, choose the day the parent promised to pay by.

6 Leave **Promise made on** 5 as today. If you are recording a promise made earlier (on paper or by phone), choose that day instead: payments from that day count towards it.

7 Write what was agreed in **Notes**.

8 Press **Record promise** 6.

If the payments made since that day already cover the amount, the message says the promise is already kept. If its date has passed, it says the promise is overdue.

You can also start a promise from other pages, with the student already chosen:

- In a student's account quick view, under **Promise to pay**, press **Record a promise**. The quick view also lists the student's open promises.
- In the balances report under **Finance reports**, press the handshake button beside a student who owes.
- On the home page, the **Promises to pay** tile has **Record a promise**. The tile shows only while a promise is open.

The system refuses a promise:

- whose amount is not at least UGX 1;
- dated before the day it was made (*The promised date cannot be before today.*);
- made more than 90 days ago, or on a day in the future.

Kept, open or overdue

You never set these yourself. Each promise is judged against the payments on the student's account:

Status	Means
Open	The date has not come, and the payments made since the promise do not yet reach the amount.
Kept	The payments made since the promise reached the amount by the date.
Overdue	The date passed before the amount was paid.
Kept, *paid late*	It was overdue, then the rest was paid.

- Only payments count: cash, bank, SchoolPay, the phone app, online payments and shares of a split payment. A bursary or a balance correction does not. A payment that was reversed no longer counts.
- Payments count by the day: one made on the day the promise was made counts.
- The status changes by itself. When a payment is recorded in School Dynamics, that student's promises are checked at once. Every hour, every open promise is checked again, so payments that arrive another way are counted too.

Follow up the list

The tiles at the top count the promises **Open**, **Overdue** and **Kept**, with the amounts, and **Kept so far** as a percentage. When promises are overdue, a red line says how many; **Follow them up** opens them.

The tabs are **Not yet kept** (the list you start on), **Overdue**, **Due this week**, **Kept**, **All** and **Overview**. Search by student, parent, phone or notes, and narrow the list by class or by the promised date (**Promised by** ... **to**).

Each row shows:

- the student, their class and what they owe now (or *in credit*, or *cleared*);
- the parent, their phone and the start of the notes;
- the amount promised and the day it was recorded;
- the date, with *N days late* or *in N days*;
- **Paid since**: what has been paid since the promise, and how much is still *to go*;
- the status.

Overview shows how the promises stand (open, overdue, kept), how many were recorded and kept each day of the last 7 days, the ones due in the next 7 days, the most overdue and the latest recorded.

CSV and **Print list** give the list you are looking at, with its tab and filters.

Open one promise

Click the amount, or the eye button. The dialog shows what was promised, what has been paid since, what is still to pay and what the student owes now. It lists every payment since the promise was recorded (marked *after the date* when it came late), the student's other promises and how many were kept on time, any demands raised from it, and who recorded it.

Change a promise or mark it kept

Open the row's menu (or the promise) and choose:

- **Follow up / edit**: change the parent, phone, amount, date or notes. Under **Status**, choose **Not yet kept** or **Kept**. When you choose **Kept**, give the day in **Kept on** (not in the future, not before the promise was made). Press **Save follow-up**.
- **Mark kept**: the promise is kept from now. Use it when the parent paid in a way that does not show on the account.
- **Delete**: the promise goes. The student's balance is not touched.

Remind parents by SMS

1. Tick the promises to remind, then press **Remind by SMS** above the list. For one promise, choose **Remind by SMS** in its row menu, or **Remind** in the open promise.
2. Check the words. The buttons above the box put in the parent's name, the student's name, the

amount promised, what is still unpaid, the date, the days overdue and the student's whole balance.

3. Read the counts: how many promises are not yet kept, how many SMS go out, how many parents have no valid number (they are left out), the cost and what is in the wallet. A few examples show the real texts.

4. Press **Send N reminders**.

Only promises not yet kept get a reminder. The text goes to the phone number of the student's parent in the school's records, not to the **Phone** typed on the promise. The same text to the same number goes once. The button stays off when the wallet cannot pay for all of them; top up first.

> ⚠ CAREFUL
>
> Each reminder is a real SMS, paid from the school's wallet. Check the examples before you press send.

Reminders can also go by themselves: a day before the promised date, on the day, and 1 and 7 days after it is missed, while the promise is not kept. They are **off** until your school switches **Promises to pay** on under **Settings › Messaging › Reminders**. See Reminders and demand notices.

Demand notices from promises

When a promise is missed, send a formal letter.

- **One promise, at once**: press the print button on its row, or **Print notice** in the open promise. You get a demand notice for that parent: what they promised and when, what has been paid since, what remains unpaid and the student's whole balance. It asks them to pay within 7 days, or within 3 working days when the promise is overdue. It has lines for the bursar and the head teacher to sign, with the bursar's signature printed when the school has uploaded one. Only promises not yet kept have it.
- **Many promises as one demand**: press **Demand notices from promises** at the top. Choose **Which promises** (overdue only, pending only, both, due on or before a date, or all), optionally **Promised at least (UGX)**, and a **Title**. Each choice shows how many promises it takes and how many of those students still owe. Press **Raise demand**. To use only some promises, tick them first and press **Demand notice**, or choose **Fees demand notice** in a row's menu.

Raising a demand opens its page, where you print the notices. Students who no longer owe anything are left out. See Reminders and demand notices.

> ⚠ CAREFUL
>
> The notes you write on a promise are printed on its demand notice. Write them so the parent can read them.

Good to know

- A promise does not change what the student owes. It is a note of what the parent said, checked against the payments.
- For a family that will pay in several parts on several dates, agree a payment plan instead.

QUESTIONS

Do I have to mark a promise kept when the parent pays?
No. When the payments made since the promise reach the amount promised, it turns **Kept** by itself. Use **Mark kept** only when the parent paid in a way that does not show on the student's account.

The parent asked for more time. What do I do?
Open the row's menu, choose **Follow up / edit** and change **To be paid by**. Write the new arrangement in **Notes**. An overdue promise with a new date in the future is open again.

Does a bursary count towards a promise?
No. Only payments count: cash, bank, SchoolPay, the phone app, online payments and shares of a split payment. A bursary or a balance correction does not.

Does deleting a promise change the balance?
No. A promise is only a note of what the parent said. The student's balance is not touched.

Which phone gets the reminder SMS?
The phone number of the student's parent in the school's records. The **Phone** typed on the promise is there for you to call; the SMS does not use it.

Payment plans

Agree with a family to pay in instalments on set dates, see each instalment paid, due or overdue as payments arrive, and follow up the ones missed.

For: Bursar · app.schooldynamics.ug/help/fees/payment-plans

Some families cannot pay a term's fees at once, but can pay in parts: UGX 200,000 now, UGX 200,000 next month, the rest before exams. A payment plan records that agreement. The system reads the payments on the student's account and shows each instalment as paid, due or overdue, so you know whom to call.

Open it from **Fees & finance › Collections › Payment plans**.

Before you start

- The bursar, the finance officer and the school administrator agree and cancel plans. The head teacher and the deputy can look at the plans but cannot change them.
- A student has one plan at a time. To agree a new one, cancel the old one first.

Agree a plan

1. Press **New plan**.
2. Under **Student**, type part of the name, the reg no. or the SchoolPay code, then pick the student. The list shows each student's balance. Once chosen, the box says what the student owes now.
3. Under **The plan covers**, choose **What is owed now** (everything the student owes today, over every term) or **Another amount**, and type it in **Amount (UGX)**.
4. Choose how many **Instalments** (1 to 12), the day the **First falls due**, and **Then**: **Every week**, **Every 2 weeks** or **Every month**. The instalments fill in below, in equal parts; the last one takes what is left over.
5. Change any date or amount in the table if the family agreed something else. Press **Add an instalment** for another row, or the cross to remove one. The **Total** must equal the plan's amount; the dialog says *Must add up to …* until it does.
6. Write what was agreed, and with whom, in **Note**.
7. Press **Agree plan**.

The system refuses a plan when:

- the student already has a plan (*Cancel it before agreeing a new one.*);
- the plan covers what is owed, but the student owes nothing (choose **Another amount** instead);
- the instalments do not add up to the plan's amount;

- an instalment is zero, falls before today, or falls on the same day as another;
- there are more than 12 instalments.

How payments are counted

You never type what was paid against a plan. The system reads it from the student's fees account:

- Every payment from the day the plan was agreed counts, through any channel: cash, bank, SchoolPay, the phone app, online payments. A payment that was reversed no longer counts.
- Payments pay the instalments in date order, the oldest first. A part payment shows on the instalment as *(UGX … paid)*.
- An instalment is **Paid** when it is covered in full, **Overdue** when its day has passed and it is not, and **Due** otherwise.

So if a parent pays two instalments at once, both show paid. If they pay less, the first instalment is part paid and the plan falls **Behind** once its day passes.

Follow the plans

The **Plans** tab lists the plans, with the number of active ones beside its name. Search by the student's name or reg no., and choose **Active**, **Cancelled** or **All**. Each row shows the plan's amount, what has been paid, what is unpaid, the next instalment (its date and what is left on it) and how it stands:

Standing	Means
On track	No instalment is overdue.
Behind	At least one instalment's day has passed and it is not fully paid.
Paid in full	The payments since the plan was agreed cover its whole amount.
Cancelled	The plan was stopped.

Click a student's name, or the eye button, to open the plan. It shows the day it was agreed and by whom, the amount, what has been paid since and what is still unpaid, every instalment with its state, and the note. **Fees account** opens the student's account.

The **Overdue instalments** tab is your follow-up list: every instalment of an active plan whose day has passed and that is not fully paid, the most overdue first, with the days late and what is unpaid.

Cancel a plan

Cancel a plan when the family stops following it, or when you need to agree a new one (new dates, a new amount).

1. Press the cancel button on the plan's row, or **Cancel plan** in the open plan.

2. Say why in **Why**.
3. Press **Cancel plan**.

The plan stops: no more reminders, and it leaves the overdue list. Payments already made stay on the fees account. The plan is kept, marked **Cancelled**, with the reason and the date. A new plan can now be agreed.

What parents see

The plan shows on the student's page for parents, with each instalment's date and amount. When the school shows the fees account to parents, they also see which instalments are paid and what is still to pay.

Reminders

Reminders for instalments can go by themselves: 3 days before an instalment falls due, on the day, and 1, 7 and 14 days after it is missed, while it is unpaid. They say what is still unpaid that day, so a family that has since paid hears nothing.

They are **off** until your school switches **Payment plan instalments** on under **Settings › Messaging › Reminders**. See Reminders and demand notices.

> **TIP**
>
> The bursar's home page counts the instalments overdue and what is unpaid on them. Start each week from the **Overdue instalments** tab.

QUESTIONS

Does a payment plan change what the student owes?
No. A plan is an agreement about when the money comes. The balance changes only with bills and payments.

Do I tick off each instalment when the parent pays?
No. Every payment into the student's fees account from the day the plan was agreed counts, whatever the channel, and pays the oldest instalment first.

Can I change the dates of a plan?
Not after it is agreed. Cancel the plan with a reason, then agree a new one. Payments already made stay on the account.

The student was billed again after the plan was agreed. Is the plan bigger now?
No. The plan keeps the amount it was agreed for. To cover the new bills, cancel it and agree a new plan for what is owed now.

What is the difference with a promise to pay?
A promise to pay is one amount by one date. A payment plan is several instalments on several dates. See Promises to pay.

Requirements students bring

Make each class's list of what students bring at the start of term, tick in what each student hands in, and take cash in place of an item.

For: Bursar, Store keeper, Head teacher, School administrator · app.schooldynamics.ug/help/fees/requirements

A requirements list says what each student in a class brings at the start of term: reams of paper, toilet rolls, a broom. There is one list per class and term. The store keeper ticks in what each student hands in, and the bursar can take cash in place of an item. Everyone sees at a glance who still owes what.

Open it from **Fees & finance › Collections › Requirements**.

Before you start

Who	Can
Head teacher, deputy, bursar, finance officer, school administrator	Make, copy and remove lists, and set their items
Store keeper, purchaser, bursar, school administrator	Tick in what students bring
Bursar, finance officer, school administrator	Take cash in place of an item
All of the above	See the lists and print the class sheets

An item can go into the store as it is ticked in. For that, the item must exist in › **Stores** with a current batch (see Keep the store).

The lists for a term

The page shows the active term's lists; choose another term at the top to look back. Each row is a class: its list's title, how many items it has, how many students, and how many have **All brought**. Click the class to open its sheet. The icons at the end of the row open the sheet, print it, edit the list, copy it, or remove it.

Make a list

1. Press **New list**.
2. Choose the **Term**.
3. Choose the **Class**. Only the classes of that term's year are offered.
4. Type a **Title**, or leave it empty for *Requirements for P.4, Term 1 · 2026*.
5. Type a **Note for parents** if you want (for example, *Label every item with the child's name*).
6. Press **Make list**. The class's sheet opens.
7. Press **Items**, and add each item (see below).

A class can have only one list per term. If it already has one, the dialog says so.

Add the items

On the class's sheet, press **Items**. For each item, fill in **Add an item** and press **Add item**:

- **Item**: its name, for example *Ream of paper*.
- **Each student brings**: how many.
- **Counted in**: the unit, for example *reams* or *rolls* (optional).
- **Cash accepted instead, each (UGX)**: what a family may pay in place of one. Leave it empty if only the item will do.
- **Goes into the store as**: the store item it becomes. Ticking it in then adds it to the store's stock. Choose *Not kept in the store* for things the store does not keep.

The pencil beside an item changes it; the bin removes it. An item that a student has already handed in stays on the list: change its quantity instead.

Copy last term's list

At the start of a new term, open last term's lists (choose the term at the top) and press the copy icon on a class's row. Choose the new **Term** and the **Class**, then press **Copy list**. The items and the note go onto the new list; check them on the sheet that opens.

Tick in what a student brought

The sheet lists the active students of the class, one row each, against every item. Each box shows what is in out of what is required, for example *1/2*, with a tick when it is complete and *·UGX* when cash was taken for it. The **Missing** column counts what each student still owes. At the top: the term, how many students **Brought everything**, and the **Items still missing**. Search by name or reg no. to find a student quickly.

1. Click the student's box under the item.
2. Under **Tick in what was brought**, check **How many**. It starts at what is still missing.
3. Leave **Add to the store** ticked to put the items into the store's current batch (it is shown only for an item kept in the store).
4. Press **Tick in**.

If the store has no current batch of that item, the dialog says so: untick **Add to the store**, or add a batch in Stores first.

Take cash in place of an item

For an item with a cash value, the bursar can take money instead. Click the student's box, then under **Cash in place of the item** choose how it is paid:

- **Paid in cash now**: type **How many** and the **Cash receipt no.**, then press **Receive UGX ...**. The item is charged to the fees account and the cash is paid against it, so the fees balance does not change.
- **Add to the fees account**: type **How many**, then press **Add UGX ...**. The item is charged to the fees account, and the family pays it with the fees: they owe that much more.

Undo a mistake

Nothing on the sheet is changed or deleted. To put a mistake right, click the student's box. Under **Handed in**, press **Undo** beside the wrong entry, type why, and press **Undo** again. A new entry cancels the old one: items ticked in come back out of the store, and cash lines on the fees account are reversed. Each entry can be undone once.

The store keeper undoes items ticked in; the bursar undoes cash.

Print a class sheet

Press **Print class sheet** on the sheet, or the print icon on the list page. You get a PDF on the school's letterhead: every student against every item, with a tick for what is complete, *2/3* for part of it, and an empty box to tick by hand. Tick it by hand on the first days of term, or file it as the record of what is still missing.

Good to know

- A student who moves to another class after handing something in stays on the old class's sheet, marked **Moved**, so nothing they brought is lost.
- A list that students have handed in items against cannot be removed.
- Parents see what is still missing for each child on the parents' pages, under **To bring**. The parents' home page also shows how many items each child still has to bring.

QUESTIONS

A parent paid cash instead of bringing the item. Does the fees balance change?
Not with **Paid in cash now**: the item is charged and the cash is paid against it at once, so the balance stays where it was and the money shows with the day's collections. With **Add to the fees account** the item is charged to the fees, and the family pays it with their fees.

Can I tick in more than the list asks for?
No. You can tick in only what is still missing. The dialog says how many more are needed.

The store keeper ticked in the wrong number. How do we fix it?
Open the student's box and press **Undo** beside the wrong entry, with a reason. The items come back out of the store. Then tick in the right number.

Can parents see what their child still has to bring?
Yes. On the parents' pages each child has a **To bring** tab listing this term's items and how many are still missing.

Do I have to make the lists again every term?
No. Copy last term's list for a class to the new term: its items and its note come with it.

Import balances and service charges from a spreadsheet

Bring each student's balance, last term's balance or service charges in from Excel or CSV. Every row is checked and shown to you before anything is posted.

For: Bursar, School administrator · app.schooldynamics.ug/help/fees/fees-imports

When a school starts with School Dynamics, its balances are usually in a spreadsheet. **Fees imports** brings them in: each student's balance now, last term's balance, and extra charges such as boarding or transport. You choose the columns and say which way the figures run. Every row is then checked and shown with what it will do. Nothing reaches a student account until you press **Post**.

Open it from **Fees & finance › Fees › Fees imports**.

Before you start

- Only the school administrator, the bursar and the finance officer can use fees imports.
- The students must already be in School Dynamics. If they are not, import the students first.
- The file is Excel (.xlsx or .xls) or CSV, up to 50 MB and 5,000 rows. One row per student, with a column that identifies the student: the SchoolPay code, the reg no, or the name. Titles above the headings are fine.
- Amounts can be written as schools usually write them: `450,000`, `UGX 450,000`, `450,000/=`. A blank cell means "no figure". A dash (`–`) means zero. A figure in brackets, `(60,000)`, is a minus figure. Words in an amount column are a problem on that row, never a silent zero.

> **GOOD TO KNOW**
>
> A fees import cannot bring in payments. It brings in balances and service charges only.

1. Upload the file

1. Press **New import**.
2. Type a **Title** you will recognise later, for example *Balances at the start of Term 3*.
3. Choose the **Term**. Bills and balances are posted into this term. You can change it before posting.
4. If you imported a file of the same layout before, choose it under **Read it like an earlier import**. Its columns and signs are filled in for you.
5. Drop the spreadsheet on **Spreadsheet**, or click to choose it.
6. Press **Upload and choose columns**.

Uploading posts nothing. The import's own page opens. Its steps are shown at the top: *1. Choose the columns*, *2. Check every row*, *3. Post*, *4. Done*.

If the same file was already uploaded, it is refused and you are told which import holds it. Open that import instead.

2. Choose the columns

School Dynamics suggests the columns from the headings. Check each one.

1. If the file has several sheets, choose the **Sheet**.
2. Under **Headings are on**, choose the row with the column titles. Rows below it are read as students.
3. Check **Post into term**.
4. Under **How each student is found**, choose **SchoolPay code**, **Reg no** or **Name**, then the column that holds it.
5. When you find students by code or reg no, choose a **Name column** too, if there is one. It is shown beside each match, it warns you when a code belongs to someone else, and with the box ticked it finds the student when the code finds no one.
6. Under **Balances**, choose **Balance now**, **Previous term's balance**, or both (see below).
7. Choose **Which way do the balances run?** (see below).
8. Under **Service columns**, choose what each other column is (see below), or leave it **Not imported**.
9. Press **Save and check every row**.

The two balance columns

Column	What it does
Balance now	What each student should owe now, all terms together. One adjustment brings the account to that figure. A blank cell leaves the account alone.
Previous term's balance	Posted as last term's balance, as a line in the chosen term. Importing it again posts only the difference.

Which way the figures run

Spreadsheets do not agree on signs. Some write what a student owes as a plus figure, others as a minus figure. So you choose, and nothing is guessed:

- **Positive numbers mean the student OWES the school**
- **Positive numbers mean the student has PAID IN ADVANCE**

Under each choice, two real rows of your sheet are read that way: *Row 14, Nakato Sarah: Balance 60,000 → Nakato Sarah owes UGX 60,000*. Compare them with what you know of those students, then choose.

Service columns

A column of charges (boarding, transport, uniform...) subscribes each student to that service for the term, with that amount, and bills it once. For each column choose:

- **A service: matched or added by heading and amount**. A service named like the heading, at the cell's amount, is used. If there is none, a new service called *Heading - amount* (for example *Boarding - 300,000*) is added to an **Imported Fees** category when you post.
- **Always this service**, one of the school's services. The amount must be its fee, or a whole number of it (2 × 35,000).

A student who already has that service in the term is not billed again.

Students who are not active

When the term is the active term, you also see **Include students who left or are not active**. Anything posted into the active term makes such a student active again and bills their class fees, as a payment would. Leave it unticked, and those rows are listed but not posted. To record balances of students who have left, choose a term that is not the active one.

3. Check every row

Checking writes nothing to any account. The page counts the rows:

Count	Means
Ready to post	The row will post the lines shown.
Problems	The row cannot post until it is fixed.
Nothing to post	A heading or total row, or the account is already right.
Posted	Already posted. It is final and is never posted again.

Each row shows the student found, the account now and after, and **What happens**: *Subscribe: Boarding*, *Previous term balance: owes UGX 120,000*, *Balance brought to: owes UGX 300,000*. Click a row to see what it will post and why, and the row as it is in the sheet.

To fix a row with a problem:

- **The student was not found, or several students fit.** Press the person icon on the row, or **Choose the student** in its quick view. Search for the student, then press **Use this student**. The row is checked again at once. **Match from the sheet again** undoes your choice.
- **The sheet is wrong** (a missing code, an amount in words). Press **Rows to fix (Excel)**, correct those rows, and upload them as a new import.

A code or name shared by several students is not guessed. If only one of them is active, that one is taken and the row warns you. Otherwise you choose. Each student can appear once in an import.

To change the columns, press **Change the columns**. After any change, press **Save and check every row** again. **Check again** checks the rows with the same columns, for example after payments were recorded meanwhile.

4. Post

> ⚠ CAREFUL
>
> Posting changes students' balances. Read the totals above the button first: subscriptions and what they bill, previous-term balances charged and credited, and adjustments charged and credited.

1. Press **Post** (the button says how many rows, for example **Post 312 rows**).
2. Read the message and confirm.

Posting runs on its own. You can leave the page: a progress bar follows you, and the page shows the result when it ends. Each row is posted whole or not at all.

Before a row is posted, its account is compared with the check. If a payment or bill reached that account in between, the row is stopped, not overwritten, and shows as a problem. Press **Check again** to see the new figures, then post the rows that are ready.

What the accounts show

Each posted row adds lines to the student's statement, marked as imported:

- a service subscription, billed once for the term;
- *Previous term balance: owes UGX 120,000*, in the chosen term;
- *Balance set by import: the student owes UGX 300,000*, the one adjustment that brings the account to the sheet's figure.

The quick view of a posted row has a **Statement** link that opens that student's account.

Other buttons on an import

Button	What it does
The file	Downloads the spreadsheet you uploaded.
All rows	Downloads every row of this import, with its outcome, as CSV.
Duplicate	Makes a new draft with the same file and columns. It posts only what is still missing.
Change status	For an import that stopped or was left behind. Choose the status and say why; the reason goes to the audit log. It posts nothing.
Cancel import	Only while nothing is posted. The import stays in the list as cancelled, and the same file can be uploaded again.

Once any row is posted, the import cannot be cancelled, its status stays, and its columns are fixed. A wrong line is corrected on the student's account: see Fixing mistakes.

The list of imports

The list shows every import of the school, with its term, how students were found, its rows, how many were posted and how many had problems. Filter it by **Not posted yet**, **Posted**, **Cancelled** or **Made in the old app**. Click a title for a quick view, or press **Continue** or **Open**.

Imports made in the old app are shown as they were left, marked **Old app**. Nothing can be changed or posted from them. To bring the same figures in again, upload the file as a new import: what is already on the accounts is taken into account.

All rows at the top of the list opens **Fees import rows**: every row of every import, which you can filter by import, student, status, retries and dates. To change a row, open its import.

QUESTIONS

Can I import payments from a spreadsheet?
No. A fees import brings in balances and service charges only. Record payments under **Fees & finance › Payments** (see Record a payment), or let SchoolPay bring them in.

What happens if I import the same figures twice?
The same file cannot be uploaded twice: you are sent to the first import. A new file with the same students is worked out from what the accounts hold now, so only what is still different is posted. A row already posted is never posted again.

A balance came in wrong. How do I undo the import?
Once rows are posted, the import cannot be cancelled and its status cannot be changed. Correct the wrong line on that student's account. See Fixing mistakes.

Should I use the balance column or the previous term's balance column?
Use **Balance now** when the sheet says what each student owes today, all terms together. Use **Previous term's balance** when the sheet holds last term's balances that should show as a line in this term. If you give both, the account ends at the balance-now figure.

Why can the head teacher not see Fees imports?

Imports post money to accounts, so only the school administrator, the bursar and the finance officer can open them.

Pocket money

Hold money for students to spend at the canteen. Top it up, set a daily limit, print a statement, refund a sale and correct mistakes.

For: Bursar, School administrator · app.schooldynamics.ug/help/fees/pocket-money

Pocket money is money a family leaves with the school for the student to spend, usually at the canteen. Each student has their own pocket money with a balance and, if you want, a daily limit. It is kept apart from fees: topping it up or spending it never changes the student's fees balance.

Open it from **Fees & finance › Collections › Pocket money**.

Before you start

- The bursar, the finance officer and the school administrator can top up, set limits, refund and correct. The head teacher and the deputy can look.
- A student's pocket money opens with its first top-up. Until then, the student is not on the list.

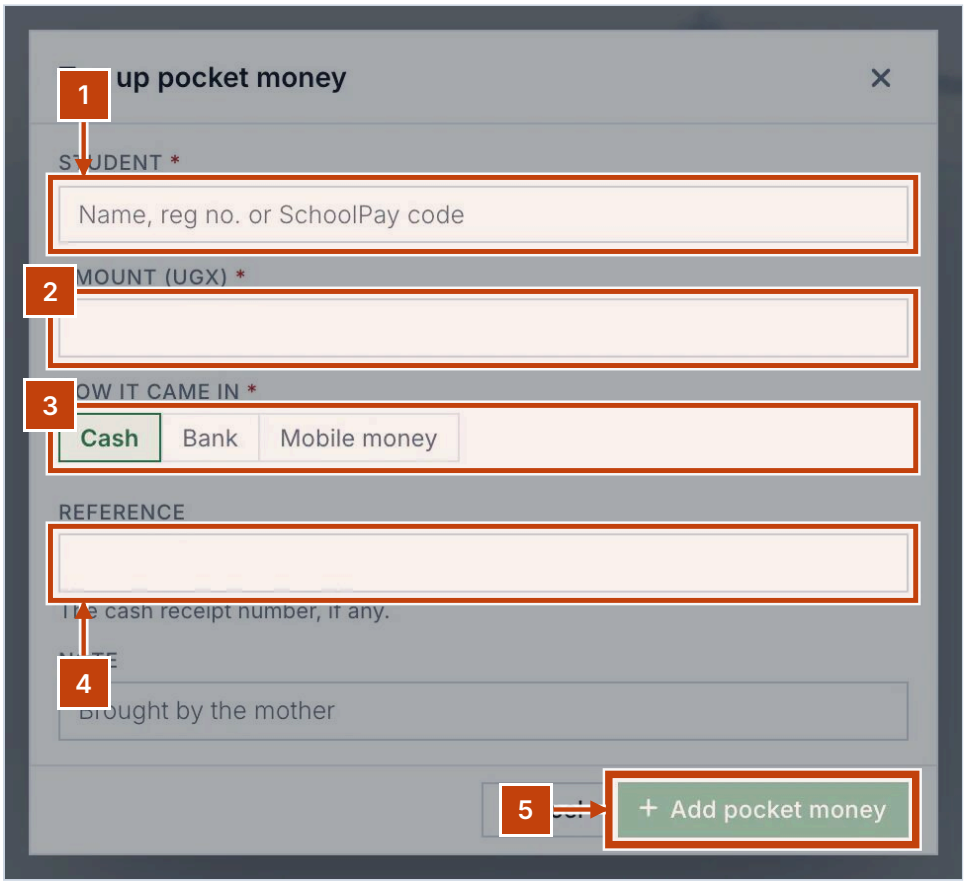
The page

At the top:

- **Held for students**: all the pocket money the school holds, and how many students have some.
- **Canteen today**: what was sold at the canteen today.
- **Low balance**: how many students have less than UGX 5,000 left.

The list shows each student's **Balance** (marked **Low** below UGX 5,000), their **Daily limit**, and what they **Spent today**. Search by name or reg no., or tick **Low balance only** to see who needs topping up.

Top up



The demo school · invented names and figures

1 Find the student by name, reg no. or SchoolPay code

2 The amount received

3 How the money came in: cash, bank or mobile money

4 The bank slip or mobile money number; for cash, the receipt number if any

5 Add the money to the student's pocket money

1. Press **Top up**. (Or press the plus icon on a student's row: the dialog opens with that student chosen.)
2. Find the student 1: type at least two letters of the name, the reg no. or the SchoolPay code, and choose them.
3. Type the **Amount (UGX)** 2.
4. Choose **How it came in** 3: **Cash**, **Bank** or **Mobile money**.
5. Type the **Reference** 4. For bank and mobile money it is required: the bank slip or the mobile money transaction number.
6. Add a **Note** if it helps, for example *Brought by the mother*.
7. Press the button at the foot 5. It shows the amount, for example **Add UGX 20,000**.

A message confirms it and gives the new balance. One top-up can be at most UGX 5,000,000.

Look at a student's pocket money

Click a student's name. The quick view shows:

- the **Balance**, what was **Spent today**, and what they **Can still spend today**;
- the **School's daily limit** and the **Parent's daily limit**;
- the **Latest movements**: top-ups, canteen sales, refunds and corrections, newest first.

Print the whole statement opens a PDF of every movement with the balance after each one.

Set a daily limit

1. In the student's quick view, press **Daily limit**.
2. Type **The school's limit a day (UGX)**, or leave it empty for none.
3. Press **Set limit**.

A limit is between UGX 100 and UGX 1,000,000. The parent can set a lower one from the parents' app; the lower of the two applies. At the canteen, a sale that would go over the day's limit is refused.

Refund a canteen sale

1. In the student's quick view, find the sale under **Latest movements**.
2. Press **Refund** beside it.
3. Check **Give back (UGX)**. It starts at the whole sale; type less to give back part of it.
4. Type **Why**.
5. Press **Refund**.

You can give back at most what is left of that sale. A refund made today is taken off what the student spent today, so it also frees room under the daily limit.

Correct a mistake

If a top-up was typed wrong, correct the balance:

1. In the student's quick view, press **Correct**.
2. Type the **Amount (UGX)**: a plus amount adds; a minus amount (for example *-2000*) takes off.
3. Type **Why**.
4. Press **Record correction**.

GOOD TO KNOW

Nothing is ever changed or deleted in pocket money. A refund or a correction is a new line on the statement, with its reason and who made it. The balance can never go below zero: a correction that would take it below zero is refused.

What happens next

- Canteen staff charge sales against the balance at the canteen.
- A student whose balance falls below UGX 5,000 shows as **Low**, here and at the canteen till.

QUESTIONS

Does pocket money count towards school fees?
No. Pocket money is the family's money held for the student. It has its own balance and never touches the fees account.

Can a student spend more than is in the wallet?
No. A sale needs the money to be there, and the balance never goes below zero.

How do I give back money taken by mistake at the canteen?
Open the student's pocket money, find the sale under **Latest movements** and press **Refund** beside it. You can give back all of it or part of it, with a reason.

Can parents limit what their child spends?
Yes. The parent can set their own daily limit from the parents' app. When both the school and the parent set one, the lower of the two applies.

Sell at the canteen

Scan a student's ID card, see what they can spend today, and charge the sale to their pocket money.

For: Store keeper, Bursar, School administrator · app.schooldynamics.ug/help/fees/canteen

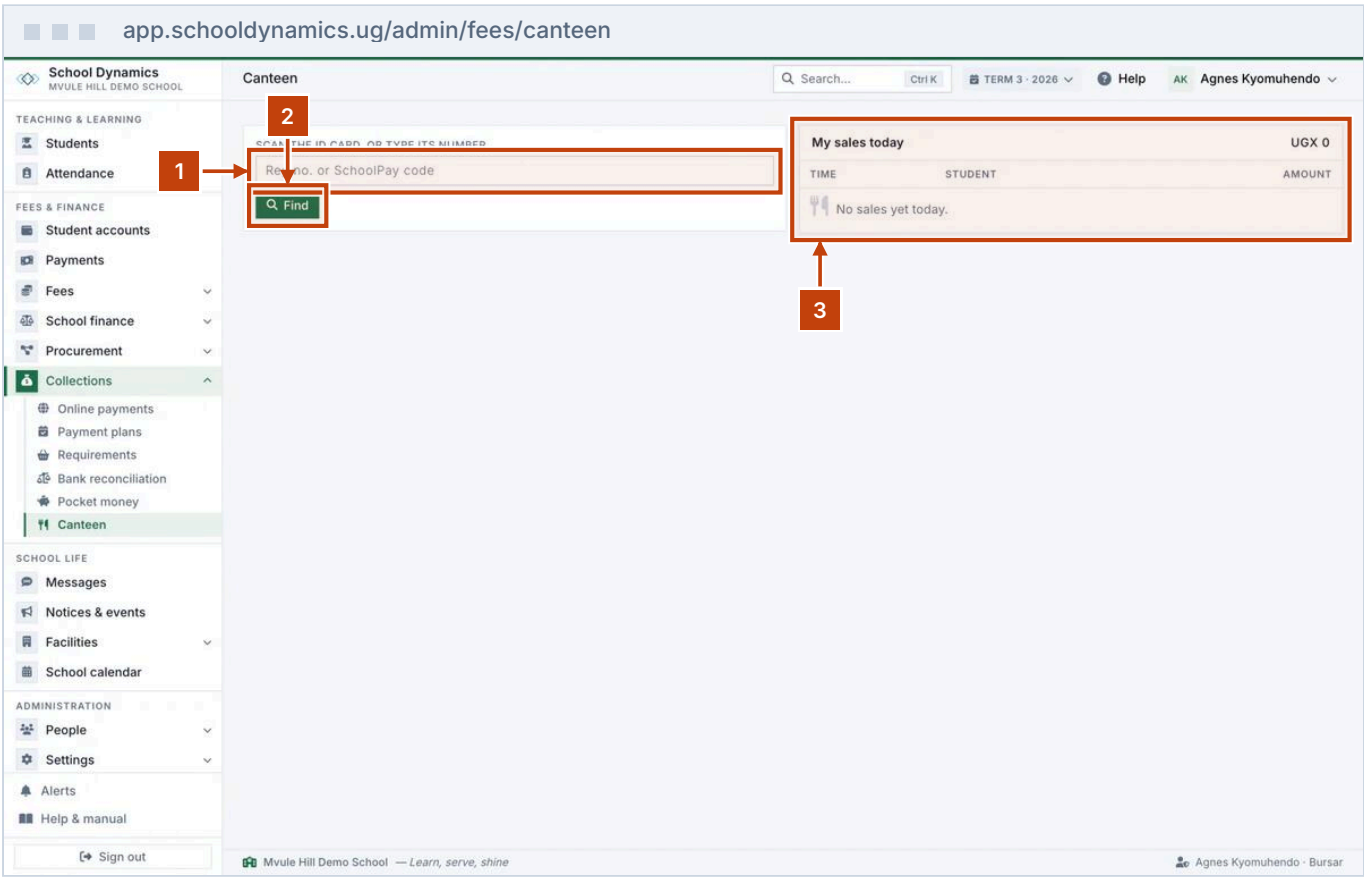
The canteen page is a till. Scan the student's ID card, see what they can spend today, type the amount, and charge it to their pocket money. The money comes off their pocket money, never their fees.

Open it from **Fees & finance › Collections › Canteen**. The bursar also finds a **Canteen** button on the **Pocket money** page.

Before you start

- The school administrator, the bursar, the finance officer and the store keeper can sell at the canteen. There is no separate canteen role: give the canteen's staff the **Store keeper** role (see Roles and permissions).
- The student must have pocket money. The bursar tops it up under **Pocket money**.
- A barcode or QR scanner that types into the page and presses Enter works. Without one, type the number.

Make a sale



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1 Scan the ID card, or type the reg no. or SchoolPay code

2 Find the student (a scanner usually presses it for you)

3 Your own sales today, with their total

1. Scan the student's ID card into **Scan the ID card, or type its number** 1, or type their reg no. or SchoolPay code.
2. Press **Find** 2. The scanner usually does this for you.
3. Check the photo, name and class. The till shows what the student **Can spend now**, what they **Spent today**, and the **Daily limit**.
4. Type the **Amount (UGX)**.
5. Type **What was bought** if you want, for example *Soda and chapati*.
6. Press **Charge**. The button shows the amount, for example **Charge UGX 2,500**.

A message says what was charged and what is left. The till is then ready for the next card. **Next student** clears the till without charging.

Your sales today are listed on the right 3, newest first, with their total.

When a sale is refused

The till says	What to do
... has no pocket money. The bursar tops it up.	The student has no pocket money yet. Send them to the bursar.
Not enough pocket money: the balance is ...	Sell less, or the family tops up.
Over the daily limit of ...: ... left today.	Sell no more than what is left today.
No student of this school has the card ...	Check the number, or type the reg no. by hand.
More than one student has the number ...	Use the student's SchoolPay code instead.

One sale can be at most UGX 500,000.

Good to know

- The daily limit is the lower of the school's limit and the parent's own. Refunds made today count back, so they free room under the limit.
- A student whose balance is below UGX 5,000 shows a low-balance warning at the till.
- The till shows the student's name, class, reg no., photo and what they can spend. Canteen staff see nothing else about the student.
- To give money back for a wrong sale, the bursar refunds it under Pocket money.

QUESTIONS

The scanner read the card twice. Was the student charged twice?
No. Each sale on the till carries its own key, so a double scan or a double click charges once.

A student has no ID card with them. What can I type?
Their reg no. or their SchoolPay code. Meal cards print no number, so a student with only a meal card uses the ID card or gives the number.

I charged the wrong amount. How do I fix it?
Ask the bursar to refund the sale under **Pocket money**: it gives the money back to the student's pocket money, with a reason.

Why is the Charge button greyed out?
The student has nothing they can spend now: the pocket money is empty, or today's limit is used up.

Match the bank statement to fees receipts

Import the bank statement and match each deposit to fees receipts, to find money that came in without a receipt and receipts the bank never shows.

For: Bursar · app.schooldynamics.ug/help/fees/bank-reconciliation

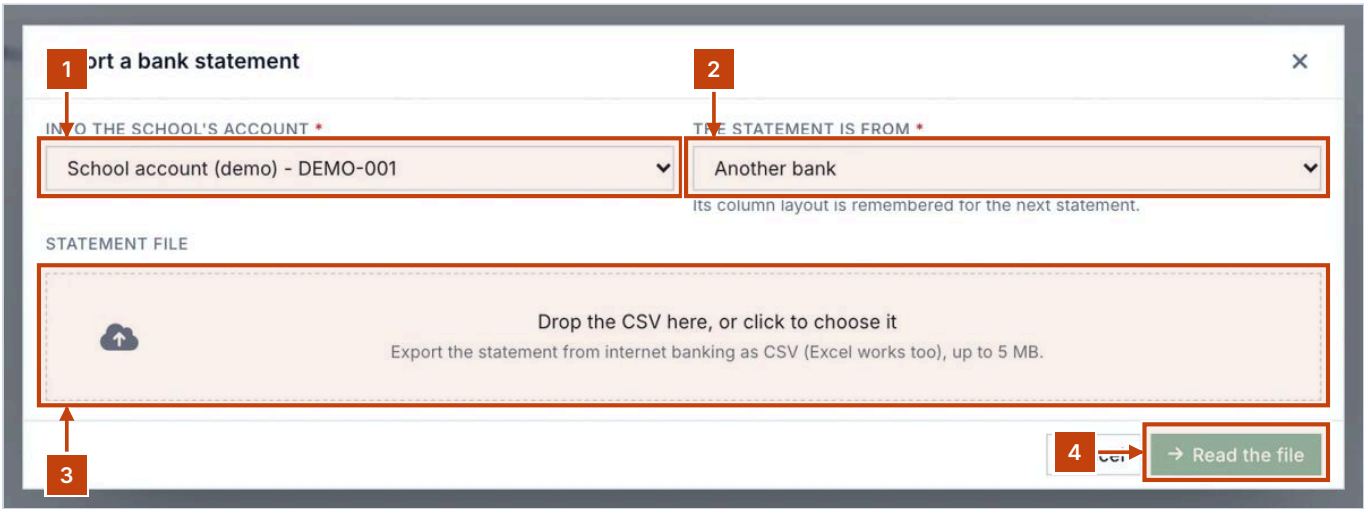
Every deposit on the school's bank statement should match a fees receipt in School Dynamics. **Bank reconciliation** puts the two side by side. You import the statement, School Dynamics matches what is certain, and you match or explain the rest. In the end you see deposits nobody receipted, and receipts the bank never shows.

Open it from **Fees & finance › Collections › Bank reconciliation**.

Before you start

- The school administrator, the bursar and the finance officer import statements, match and reconcile. The head teacher and the deputy can look.
- The school's bank account must exist under › **Bank accounts & votes**.
- Bank payments are matched only when they were recorded into **that** bank account. Choose the right account when you record a bank payment.
- Export the statement from internet banking as CSV (Excel works too), up to 5 MB and 5,000 lines.

Import a statement



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1. The school's bank account the statement belongs to.
2. The bank. Its column layout is remembered for next time.
3. Drop the statement exported from internet banking (CSV or Excel).
4. Read the file, then check its columns.

1. Press **Import a bank statement**.
2. Under **Into the school's account** 1, choose the bank account.
3. Under **The statement is from** 2, choose the bank: Stanbic Bank, Centenary Bank, dfcu Bank, Equity Bank, Absa Bank, Bank of Africa, or Another bank.
4. Drop the file on **Statement file** 3.
5. Press **Read the file** 4.
6. Check the columns. **Headings are on row** is the row with the column titles (statements often start with lines about the account). Choose how **Dates are written**, then the column for **Transaction date**, **Description**, and either **Money in (credit)** and **Money out (debit)**, or the one **Amount (one signed column)**. **Reference** and **Balance** help when the bank has them.
7. Press **Check the lines**.
8. Read the preview: **New lines**, **Money in**, and **Already here** (lines brought in from an earlier statement). Lines that could not be read are listed.
9. Press **Import** (the button says how many lines, for example **Import 214 lines**).

The columns you chose are saved for that bank, and filled in the next time. Lines with no money (the opening or closing balance, totals) are left out.

The statement opens, already matched as far as is certain. A message says how many lines were imported and how many matched.

How matching works

A deposit is compared with the receipts paid within 5 days either side of its date, for the same amount. A receipt is money paid in through the bank (into this account), SchoolPay, PegPay or online (Pesapal). It is matched for you only when that is certain:

1. A receipt of that amount whose reference is written on the bank line.
2. Otherwise, the only receipt of that amount, when no other open bank line of the same amount could be it.
3. Otherwise, when no single receipt fits, the only day's total of one channel. SchoolPay, PegPay and Pesapal pay schools one sum per day.

Anything less certain is left for you. A receipt is matched to one bank line only.

Work through a statement

The top of the page shows the period and file, how many money-in lines are matched, how many lines are reconciled, and how many were not found in the bank or in the fees records. The tabs:

Tab	Shows
Not found in the ledger	Money in with no receipt matched yet. Start here.
Matched	Lines matched to receipts, waiting for you to confirm them.
Reconciled	Lines confirmed, with who did it and when.
Money out	Withdrawals, charges and transfers out.
Receipts not on the statement	Receipts of the period that no bank line shows.

Match a line by hand

1. On **Not found in the ledger**, press **Match** on the line.
2. Tick the receipts it is. Receipts of the same amount come first. Under **A day's total**, **Choose these** ticks all of one channel's receipts for a day.
3. Check **Chosen**: what you ticked, against the bank's figure.
4. If they differ, write a **Note** saying why, for example *less Pesapal charges*.
5. Press **Match** (the button counts what you ticked, for example **Match 3 receipts**).

If no receipt fits, the payment may not be recorded yet, or it was recorded with another date, channel or bank account. Record or correct it, then come back and match the line. **Match what is certain** runs the automatic matching again.

Confirm the matches

On **Matched**, check the student and channel beside each line, then press **Reconcile all matched**. Every matched line is marked reconciled in your name. To confirm one line, press **Reconcile** on it, then **Mark reconciled**.

Lines that are not fees

A line that is not a fees deposit (bank charges, interest, a transfer to the savings account, other income) cannot be matched. Press **Reconcile**, write a **Note** saying what it is, then press **Mark reconciled**. Money out is always reconciled this way.

Undo

Unmatch removes a match that is wrong. A reconciled line must first be reopened: press **Reopen** on it.

Receipts not on the statement

This tab lists receipts the fees records hold for the statement's period (with 5 days either side) that no bank line claims. Each one is money School Dynamics says came in, but no statement shows. Check whether it is on the next statement, or whether it was recorded with the wrong channel, date or bank account.

> GOOD TO KNOW
>
> SchoolPay, PegPay and online receipts are listed here whichever bank account they are paid into. If they go to another account, import that account's statement too.

Remove a wrong statement

While no line of a statement is reconciled, **Remove** takes it away with its matches. Nothing in the fees records changes. Once a line is reconciled, the statement stays: reopen its lines first.

Good to know

- Nothing is ever posted from this page. Balances do not change when you match or reconcile.
- The list of statements shows, for each one, the money in, how many lines are matched and reconciled, and how many money-in lines were not found. Click the bank account for a quick view of the deposits still waiting for a receipt, then **Open to match**.

QUESTIONS

Does matching a line change any balance?
No. Bank reconciliation only reads the fees records. Nothing is ever posted from it. If a deposit has no receipt, record the payment under **Fees & finance › Payments**, then match the line.

My statements overlap by a few days. Will deposits be counted twice?
No. A line already brought in from an earlier statement of the same account is shown as **Already here** and is not imported again.

SchoolPay paid us one sum for the whole day. How do I match it?
Press **Match** on the line. Under **A day's total**, the receipts of that channel and day that add up to the amount are offered together: press **Choose these**, then the **Match** button at the foot. When only one such day's total fits, **Match what is certain** does it for you.

The bank figure is a little less than the receipts. Can I still match?
Yes. Choose the receipts and write a **Note** saying why, for example *less Pesapal charges*. Without a note, receipts that do not add up to the bank's figure are refused.

Can the head teacher see this page?
The head teacher and the deputy can see the statements and how far matching has got. Only the school administrator, the bursar and the finance officer can import statements, match and reconcile.

Reminders and demand notices

Chase unpaid fees. Print demand notices, meal cards and gate passes for the students who owe, text their parents once, and set up fee reminders that go by themselves.

For: Bursar, Head teacher · app.schooldynamics.ug/help/fees/reminders-and-demand-notices

When parents fall behind, you remind them. School Dynamics has two kinds of reminder. A **demand notice** is a letter to each parent whose child owes, printed from a demand, with meal cards, gate passes and one SMS to go with it. **Text reminders** go to parents by SMS, either when you send them or by themselves on dates you set.

Demands are under **Fees & finance › School finance › Finance reports**, on the **Demand notices** tab. The automatic reminders are under **Settings › Messaging › Reminders**.

Before you start

- The bursar, the finance officer and the school administrator make and change demands. The head teacher and the deputy can open demands and print them, but not change them.
- Sending a demand's SMS is for the bursar and the school administrator. Every SMS is paid from the school's SMS wallet. See How SMS works.

Make a demand

A demand is a rule that picks students by their balance: for example, *P.5, P.6 and P.7, boarders, owing at least UGX 200,000*. It then prints a notice for each of them.

1. Press **New demand**.
2. Type a **Title**, for example *Term 3 balances, P.7*.
3. Under **Students who**, choose the condition and type the amount: **owe at least**, **owe more than**, **owe at most (or nothing)**, **owe less than (or nothing)**, **owe exactly**, **have paid ahead by at least** or **have paid ahead by more than**. It starts at *owe more than UGX 0*, which means everyone who owes. The line under it says in words whom it selects.
4. Choose the students:
   - **By class**: tick the classes, and choose the **Residence** (**Everyone**, **Day scholars** or **Boarders**). Only active students in those classes now are picked.
   - **Named students**: add the students one by one. They are picked whatever their status or residence, but the balance condition still applies.
5. To print a big class in parts, tick **Print only part of each class list** and give the positions. They are counted from 0 in each class list: 0 to 49 is the first 50 students.
6. Read the green line: *Selects N students now, owing UGX ... in all.*

7. Choose the **Due date**. It is printed on the notices; it is also the month on meal cards and the expiry on gate passes.
8. Tick **Students' photos on meal cards and gate passes** if you want them.
9. Check the **Notice text**. The buttons above it put in the student's name, class, balance and SchoolPay code, and, when the parent made a promise to pay, the details of that promise. A blank line starts a new paragraph.
10. Check the **SMS text**, or empty it to send no SMS.
11. Press **Save demand**. The demand's page opens.

The balance a demand reads is everything the student owes, over every term. The amount on the notice has no minus sign: a balance of UGX -350,000 prints as *UGX 350,000*.

> GOOD TO KNOW
>
> A demand is not a fixed list. It picks its students each time you open it or print from it, by their balance at that moment. A parent who has paid since does not get a notice.

Print the notices, meal cards and gate passes

Open a demand by clicking its title in the list (a quick view shows how many students it reaches and what they owe), then **Full record**; or go straight to the page after saving. At the top: how many students it selects now, what they owe, the due date and whether its SMS was sent.

Under **Print**:

- **Demand notices**: one letter for each selected student who owes, on the school's letterhead, as many to a page as fit, with a line to cut along. The bursar's signature is printed on each when the school has uploaded one; otherwise there is a line to sign.
- **Notices, two a page (larger)**: the same letters, bigger.
- **Meal cards**: boarders' cards have breakfast, lunch and supper for each day of the due date's month; day scholars' have the week days.
- **Gate passes**: with the balance and the due date as the expiry.
- **List of students**: everyone selected, by class, with their balances.

Students who owe nothing (a demand for meal cards often picks them) get no demand notice; meal cards and gate passes include them. The page says how many were left out.

Below, the page lists the selected students class by class, with their residence, payment code and balance. Click a name to open the student's account.

Send the demand's SMS

1. On the demand's page, under **SMS to parents**, press **Send SMS...**.

2 Read the counts: the students who owe, the SMS going out, the parents with no valid number (left out), the cost and what is in the wallet, and a few example texts.

3 Press **Send N SMS**.

Each student's parent gets the text; a student with no parent on record gets it on their own number. The same text to the same number goes once. Students who owe nothing are not texted.

> ⚠ CAREFUL
>
> A demand sends its SMS **once**. After that the button is gone. To remind the same parents again later, press **Duplicate** and send the copy's SMS.

If the card says the demand has no SMS text, press **Edit** and add one. If the wallet cannot pay for every message, nothing is sent: top up first. If the school cannot send messages at all, the card says why.

Change, copy or delete a demand

- **Edit** (on the demand's page, or in the row's menu in the list) opens the same form. Press **Save changes**.
- **Duplicate** makes a copy with *(copy)* after the title. The copy has not printed or sent anything yet, so it can send its SMS again.
- **Delete** (in the row's menu) removes only the demand. No balance is touched, and SMS already sent stay sent.

The list shows each demand's condition, its classes (or how many named students), residence, due date, and whether it was **Printed** and its **SMS sent**. Search by title, or choose a residence.

Demands from promises to pay

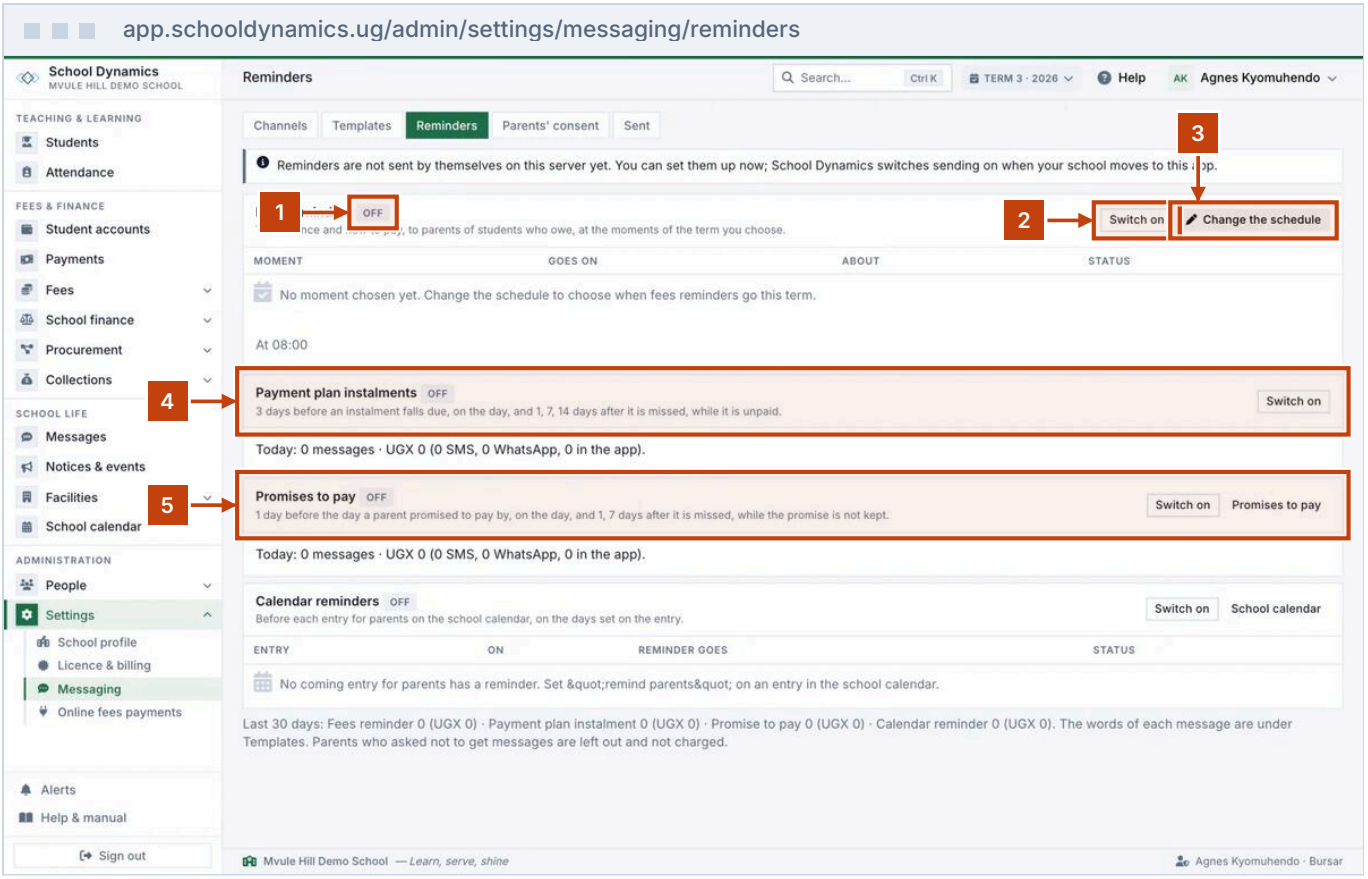
When parents have missed their promises, press **From promises to pay** above the list, then **Demand notices from promises** on that page. The demand names the students of the promises you chose who still owe, and its notice quotes each parent's promise. It has no SMS text until you edit it. See Promises to pay.

Text reminders you send

To	Use
Text every parent whose child owes, today	A new message under **Messages** to classes or parents, with *Only parents of students with a fees balance condition* ticked and the fees balance put into the words. See Sending a message.
Send the balance and how to pay, now or on a date	The **Balance and how to pay** message under **Settings › Messaging › Templates**.
Remind before a fees deadline	The **Fees deadline** message under **Settings › Messaging › Templates**: reminders on the days before the deadline you set, to parents of students who still owe.
Remind parents who promised a date	**Remind by SMS** on Promises to pay.
Send letters	A demand, above.

Reminders that go by themselves

Three reminders about fees can go without anyone pressing send. **Each one is off until your school switches it on.**



The demo school · invented names and figures

1 Fees reminders are On or Off. They start Off.

2 Switch them on or off.

3 Choose the moments of the term they go: after opening, mid-term, before exams, before report cards.

4 Reminders for payment-plan instalments, switched on here.

5 Reminders for promises to pay, switched on here.

- **Fees reminders** 1 : the balance and how to pay, to the parent of every active student who owes, at the moments of the term you choose. Each child's parent gets one reminder for each moment.
- **Payment plan instalments** 4 : before, on and after the day each instalment falls due, while it is unpaid. See Payment plans.
- **Promises to pay** 5 : before, on and after the day a parent promised to pay by, while the promise is not kept. See Promises to pay.

To set up fees reminders:

1. Open **Settings › Messaging**, then the **Reminders** tab.
2. Under **Fees reminders**, press **Change the schedule** 3 .
3. Choose the moments. Leave a moment empty to skip it:
   - **Days after the term opens** (0 is the first day of term);
   - **Mid-term** (half way through the term);
   - **Days before exams** (before each published exam timetable and exam week);

- **Days before report cards**, and when **Report cards come out on** (empty: the term's last day).

4. Choose the **Time of day**.
5. To leave out small balances, type an amount in **Only students owing more than (UGX)**. To remind some classes only, tick them under **Only these classes**.
6. Press **Save the schedule**.
7. Press **Switch on** 2.

The table then lists this term's moments, the day and time each goes, and whether it is coming, due now, sent or passed. The **Next:** line says how many messages the next one will send, what it costs and what is in the wallet. The words of each reminder are under **Settings › Messaging › Templates**. Parents who asked not to get messages are left out and not charged.

> **GOOD TO KNOW**
>
> If the page says *Reminders are not sent by themselves on this server yet*, you can still set everything up now. School Dynamics switches sending on when your school moves to this app. Until both are on, nothing goes by itself. More in Automatic messages.

QUESTIONS

Why did a student who owes nothing not get a notice?
Demand notices and the demand's SMS are only for students who owe. A demand can select students who are cleared or in credit (for meal cards or gate passes), but they get no letter and no SMS. The demand page says how many were left out.

I sent a demand's SMS last week. How do I remind the same parents again?
A demand sends its SMS once. Press **Duplicate** on the demand, then send the copy's SMS.

A parent paid after I made the demand. Will they still get a notice?
Not if they no longer owe. A demand picks its students each time you open or print it, by the balance at that moment.

Are fee reminders sent automatically?
Only when your school switches them on under **Settings › Messaging › Reminders**. Every reminder that goes by itself starts off.

Does deleting a demand change any balance?
No. Only the demand goes. SMS already sent stay sent.

08

School finance

Budgets and votes, spending, income, fund requests, the books of account and the reports for the committee.

The school's own money: the budget and its votes, what is spent and received, requests for funds, and the books of account and reports that a finance committee or board reads.

Set the budget and follow spending against it	6 min
Set up votes and budget accounts	5 min
Record spending and pay what is owed to suppliers	6 min
Plan income and record income that is not fees	4 min
Ask finance for funds, and approve or reject requests	2 min
Keep the books of account	7 min
Read the term's finance reports	4 min
Prepare reports for the finance committee	3 min

Set the budget and follow spending against it

See what each vote and budget account was given against what it spent, for a term, a year or all time, and add the term's budget lines.

For: Bursar, Head teacher, School owner · app.schooldynamics.ug/help/finance/budget-and-expenditure

Budget & expenditure compares what each vote and budget account was given with what it spent. Use it at the start of a term to set the budget, and during the term to see what is over or nearly over.

Open it from **Fees & finance › School finance › Budget & expenditure**. The first tab is **Budget vs spending**.

Before you start

- The bursar, the finance officer and the school administrator add and change lines. The head teacher and the deputy can see every figure, but cannot change anything.
- The school needs its votes and budget accounts. If it has none, set them up first: see Votes and budget accounts.

Reading the page

At the top, choose the period: **Term**, **Year** or **All time**. The term list starts on the term chosen in the top bar; pick another term to look back. To see one vote alone, choose it in the vote list, which starts on **Every vote**.

The four figures:

Figure	Means
Budget	Every budget line in the period.
Spent	Every expenditure in the period, and how much of the budget that is. Click it for the lines.
Left to spend / Over budget	Budget less spent. It reads **No budget set** when there is no budget for the period.
Owed to suppliers	What the school still owes for things bought on credit, and how much is overdue. Click it for Creditors.

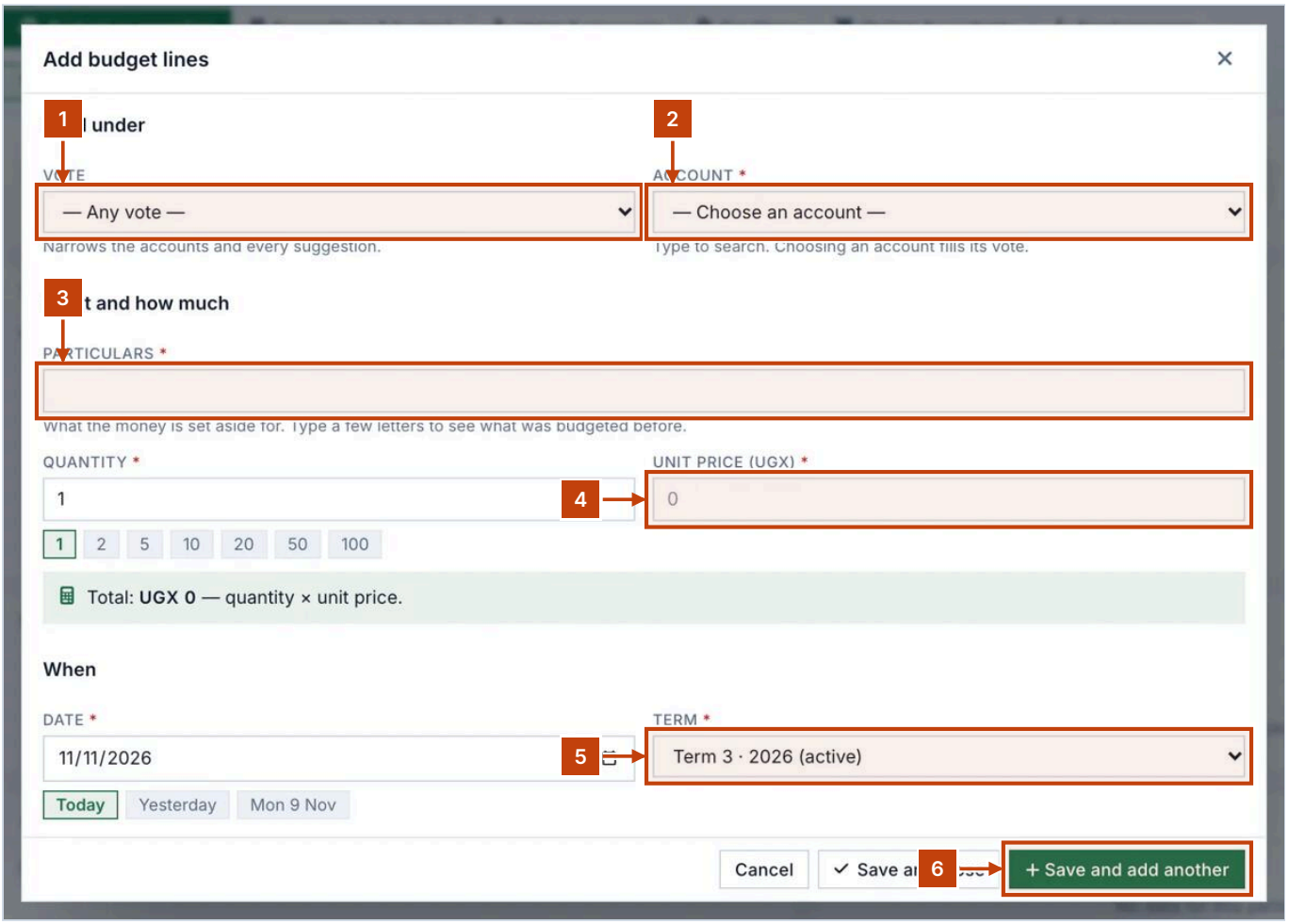
The table **Budget against spending** lists each vote, then its accounts, with **Budget**, **Spent**, **Left** and a bar for how much of the budget is spent. An account spent past its budget is shown in red and reads, for example, *630,000 over*. An account with spending but no budget shows **No budget**.

- Click a vote's name to see that vote alone.
- Click an account's name to open its own page (see below).

Further down: **Term by term** (budget and spending for the last terms; click a bar to open that term), **Month by month** (spending in the last six months, by the date it was paid), **Over budget** (the accounts furthest over), **How it was paid**, **Latest spending** and **Owed to suppliers**.

Add the term's budget

Each budget line is an amount for one budget account in one term.



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1. Optional: a vote narrows the accounts and the suggestions.
2. The budget account the money is set aside for.
3. Particulars: what the money is for.
4. Quantity × unit price makes the amount.
5. The term this budget belongs to.
6. Save and stay in the dialog for the next line.

1. Press **Budget line**. The dialog **Add budget lines** opens on today's date and the active term.
2. Choose the **Account** 2. Choosing a vote first 1 shortens the list; choosing an account fills in its vote.
3. Type the **Particulars** 3, for example *Maize flour, 50 bags*.
4. Type the **Quantity** and the **Unit price (UGX)** 4. The total is shown under them.
5. Check the **Term** 5.
6. Press **Save and add another** 6, or press Enter. The line is saved and the dialog stays open, on the same account and term, for the next line.
7. When you have entered the last line, press **Done**.

The dialog helps when you enter many lines at a sitting:

- **Most used** under the account offers the accounts used most in the last six months.
- **Budgeted before** offers lines entered before on that account or vote. One click fills in the account, particulars, quantity and unit price; the date and term stay as they are.
- **Budgeted at** under the unit price offers prices used before for exactly the same particulars.
- **Entered in this sitting** at the top lists what you saved, with its total. To take one back, press its arrow; that line is deleted.

Press **Save and close** to save one line and close the dialog.

> **TIP**
>
> Budgets are often the same as last term. Open the **Expenditure & budget** tab, choose **Budget lines** and last term, and use **Duplicate (dated today)** on each line you need again. Then edit the copy's term.

The tabs

Tab	What it shows
Budget vs spending	The page above.
Expenditure & budget	Every line, one by one, with filters.
Votes & accounts	The votes and their accounts: see Votes and budget accounts.
Creditors	What the school owes its suppliers: see Record spending.
Suppliers	Shown only to those who cannot see Procurement; others find it under **Procurement › Suppliers**.
Orders & products	Simple orders placed with suppliers (below).
Fund requests	Requests for money from staff: see Fund requests.

Every line, one by one

The **Expenditure & budget** tab lists the lines. Switch between **Expenditure** and **Budget lines** at the top. The figures show the total, the number of lines shown and, for expenditure, how much was **Bought on credit**.

Narrow the list by particulars or line number, term (**Active term**, **All terms** or one term), vote, account, supplier, payment method, dates, amount (**More than**, **Less than**, **Exactly**) and **On credit only**.

Click a line's particulars for **Details and history**: who recorded it, when, and every change since. The row menu also has:

- **Account's budget vs spending**: the account's own page.
- **Its credit**: for a line bought on credit, its entry under Creditors.
- **Edit**, **Duplicate (dated today)** and **Delete** (bursar, finance officer and school administrator).

> ⚠ **CAREFUL**
>
> A deleted line leaves every total, but stays in the history. A line bought on credit cannot be deleted once a payment to the supplier is recorded against it: delete that payment first. A line posted by a supplier invoice or by the payroll cannot be deleted here; only its particulars, date and payment method can be changed. Spending dated in closed books cannot be added, changed or deleted.

Export downloads the figures as a CSV file for a spreadsheet.

An account's own page

Click an account anywhere on these pages to open it. It shows **Budgeted, all terms**, **Spent, all terms** and **Left to spend**, then a **Term by term** table and the **Latest lines**. Its buttons add a **Budget line** or **Record expenditure** already filed on this account. **Every line** opens the list for this account in every term.

Under **Tidy the chart of accounts**, finance staff can **Merge into another account...** (for two spellings of one thing: every line moves across) or **Delete account** (its lines move to *Unclassified*). Nothing is lost either way.

Orders & products

Orders & products keeps simple orders placed with a supplier, priced from the products that supplier sells.

- **Place an order**: choose the **Supplier**, then each product and its quantity (**Another product** adds a line), the **Delivery** and a **Note to the supplier**. Press **Place order**.
- Update an order with its pencil: **Order status** (Pending, Received, Completed or Canceled), **Paid?** with the amount and how it was paid, and the invoice, receipt and goods received note as files.
- The **Products** switch lists each supplier's products. **New product** asks for the supplier, the store item it is, its name, unit price and pricing details.

> GOOD TO KNOW
>
> An order here does not record any spending. Record what was paid with **Record expenditure**. For buying with approvals, quotations and goods received, use Procurement instead.

Good to know

- Spending counts in the term chosen on its line, whatever the date it was paid.
- The **Committee reports** button at the top opens the report library, with the budget summary and the committee pack: see Committee reports.
- Votes can be merged or deleted from the row menu of a vote here too. A deleted vote's accounts and lines move to *Unclassified*, to be sorted out.

QUESTIONS

Does anything on this page change a student's balance?
No. Budget lines and spending are kept apart from fees. Nothing here touches a student's account.

Why does an account say "No budget"?
Money was spent on it in the period, but no budget line was added for it. Add a budget line for that account and term.

Can the head teacher change the budget?
No. The head teacher and the deputy can look at every figure. Only the bursar, the finance officer and the school administrator add or change lines.

How do I see last term's figures?
Choose the term in the top bar, or choose it in the term list on this page. **Year** and **All time** add up more than one term.

Set up votes and budget accounts

Build the school's budget headings, the votes and the accounts under them, then rename, move, merge or number them for the committee.

For: Bursar, School owner · app.schooldynamics.ug/help/finance/votes-and-budget-accounts

A vote is a main heading of the school's budget, such as KITCHEN, ADMINISTRATION or BOARD ACTIVITIES. Under each vote sit its budget accounts, such as Food stuffs, Firewood and Kitchen utensils. Every budget line and every expenditure is filed against a budget account, so the votes are the first thing to set up.

Open it from **Fees & finance › School finance › Votes & budget accounts**. It is also the **Votes & accounts** tab of Budget & expenditure.

Before you start

The bursar, the finance officer and the school administrator add and change votes and accounts. The head teacher and the deputy can see the page and its figures, but cannot change anything.

Reading the page

The page shows every vote as a card, with its accounts underneath. Each vote and each account has its **Budget**, **Spent**, **Left** and a bar for how much of the budget is spent, in the term chosen in the top bar. To see another term, change it in the top bar.

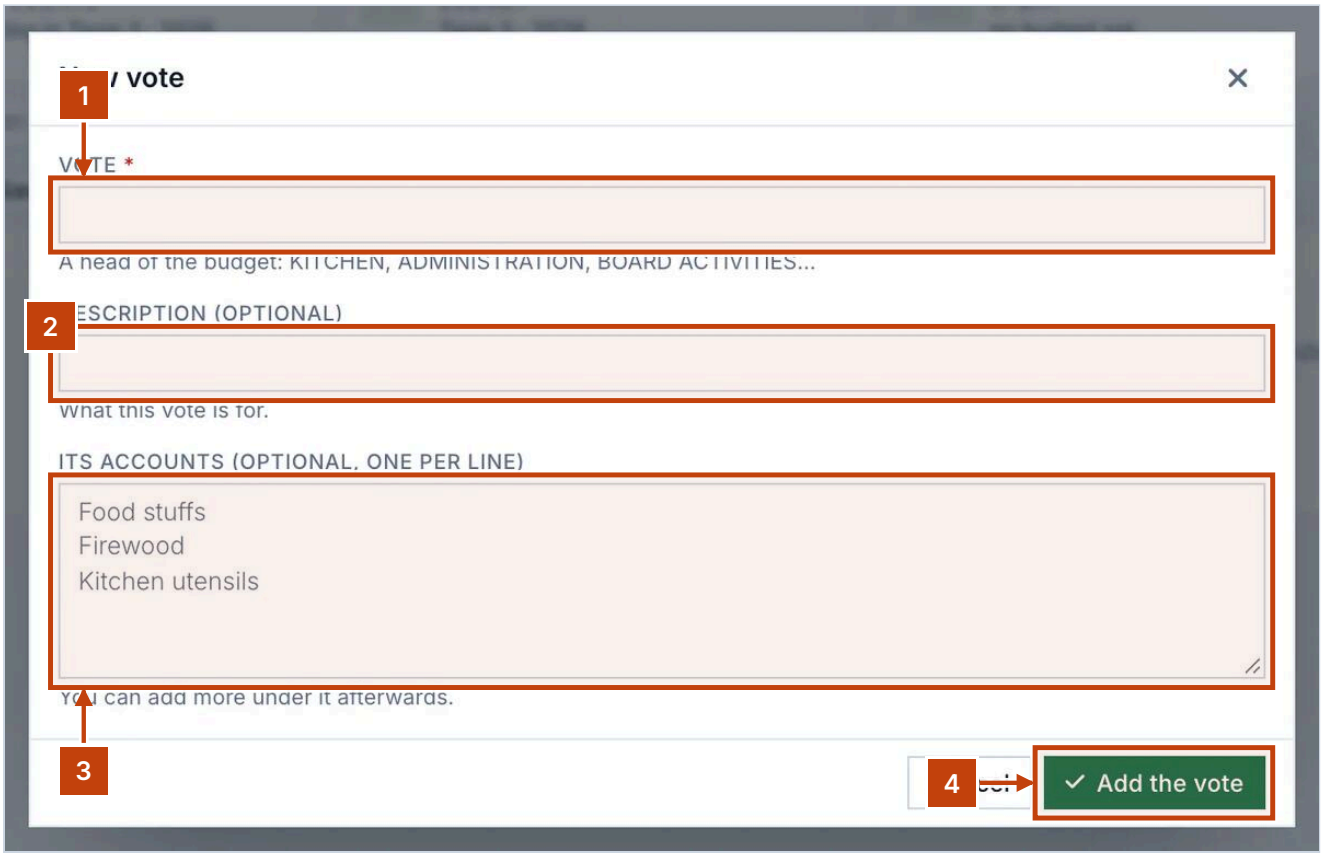
The figures at the top count the votes and accounts (and how many had nothing in the term), and add up the budget, the spending and what is left.

A vote may carry:

- **No. 3**: its committee number. Reports list votes in this order.
- A badge for its kind, when it is not ordinary spending: **Capital (fixed assets)**, **Advances and loans** or **Paying creditors**.
- **To sort out**: the *Unclassified* vote, which holds what was left by a deleted vote.

Type in **Find a vote or an account...** to show only the votes and accounts whose names match.

Add a vote



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1 The vote: a main heading of the budget, such as KITCHEN.

2 Optional: what the vote is for.

3 Optional: its first accounts, one per line.

4 Add it; the box for more accounts opens under it.

1. Press **New vote**.
2. Type the **Vote** 1, for example *KITCHEN*.
3. Type a **Description** if you want one 2.
4. Type its first accounts under **Its accounts** 3, one per line, for example *Food stuffs*, *Firewood*, *Kitchen utensils*. You can leave this empty and add them afterwards.
5. Press **Add the vote** 4.

The vote appears with its accounts, and the box for adding more accounts opens under it. Two votes cannot have the same name.

Add accounts under a vote

1. Press **Accounts** on the vote (or **Add the first account of …** on an empty vote).

2. Type a name and press Enter. It is added and the box stays open for the next one.
3. To add several at once, paste them one per line (Shift+Enter starts a new line), then press **Add**.
4. Press **Done** when you have finished.

A name the vote already has is skipped, and the page says which ones were not added.

Change, move and order accounts

Press the pencil beside an account to change it where it stands:

- its name;
- its vote (**Vote: …**): the account moves to that vote, with its budget and spending;
- its kind (**Expense account**, **Asset account** and so on);
- its **Place** in the vote: 1 is first. Leave it empty to list it A to Z after the placed ones.

Press **Save**, or Escape to cancel.

To change a vote's name or description, open the vote's menu and choose **Name and description**.

Kind and committee number

Open a vote's menu and choose **Kind and committee number…**.

What the vote is	Use it for
Spending	Ordinary running costs.
Capital (fixed assets)	Buildings, furniture, vehicles: spending in the budget, a fixed asset in the books.
Advances and loans	Salary advances and loans to staff: money owed back to the school, not spending.
Paying creditors	Paying for things bought on credit in earlier terms.

The **Committee number** is the vote's place in the committee's order (Vote 1, Appendix I …), from 1 to 999. The committee pack and the reports list votes by it. Two votes cannot share a number, and only one vote can be **Paying creditors**.

> ⚠ CAREFUL
>
> A vote marked **Paying creditors** does not take new expenditure. Recording spending under it is refused with *This vote pays creditors. Record the payment on the credit (Creditors › Pay)…*, so that what was bought on credit is not counted as spending twice. Pay those suppliers from Creditors.

Merge and delete

Two accounts or votes that are the same thing (two spellings) should be merged, not deleted.

- **Merge into another vote…** (vote menu): every account and line of the vote moves to the vote you choose, then the vote goes.
- **Delete vote…** (vote menu): its accounts and lines move to *Unclassified*.
- **Merge into another account…** (account menu): every budget and spending line of the account, in every term, moves to the account you choose, then the account goes.
- **Delete…** (account menu): its lines move to *Unclassified*.

The dialog says how many accounts and lines will move before you confirm.

Other account tools

The account menu also has:

- **Its lines**: the account's own page, term by term.
- **Recalculate balance**: works the account's balance out again from its ledger lines.
- **Mark verified** / **Mark not verified**: a tick beside the name, for accounts you have checked.
- **Move lines here by keyword…**: moves ledger lines whose description holds a word (more than 2 characters) into this account. The dialog counts them and shows some first; press **Move the lines** to move them. Lines on a bank, cash or student account stay where they are.

Export downloads the tree with this term's figures as Excel or CSV. **Account balances and CSV** opens the chart of accounts under **Payments › Bank accounts & votes**.

Good to know

- New votes and accounts are ready at once in the **Record expenditure** and **Budget line** dialogs.
- The Books of account keep a matching account for each vote; renaming the vote here renames it there.

QUESTIONS

What is the Unclassified vote?
It holds the accounts and lines of a vote that was deleted. Move its accounts to real votes, so they count where they belong. It cannot be renamed, merged or deleted.

Is anything lost when I delete a vote or an account?
No. A deleted vote's accounts and lines move to *Unclassified*. A deleted account's lines move to *Unclassified* too. To keep lines together under another vote or account, merge instead.

Why is the budget empty here when we set one last term?
The page shows the term chosen in the top bar. Choose last term there to see its figures.

Why are votes in a strange order?
Votes are listed by their committee number, then A to Z. Give each vote its number under **Kind and committee number…**.

Record spending and pay what is owed to suppliers

Record each expenditure on its budget account, mark what was bought on credit, and pay suppliers from Creditors until nothing is owed.

For: Bursar · app.schooldynamics.ug/help/finance/recording-spending

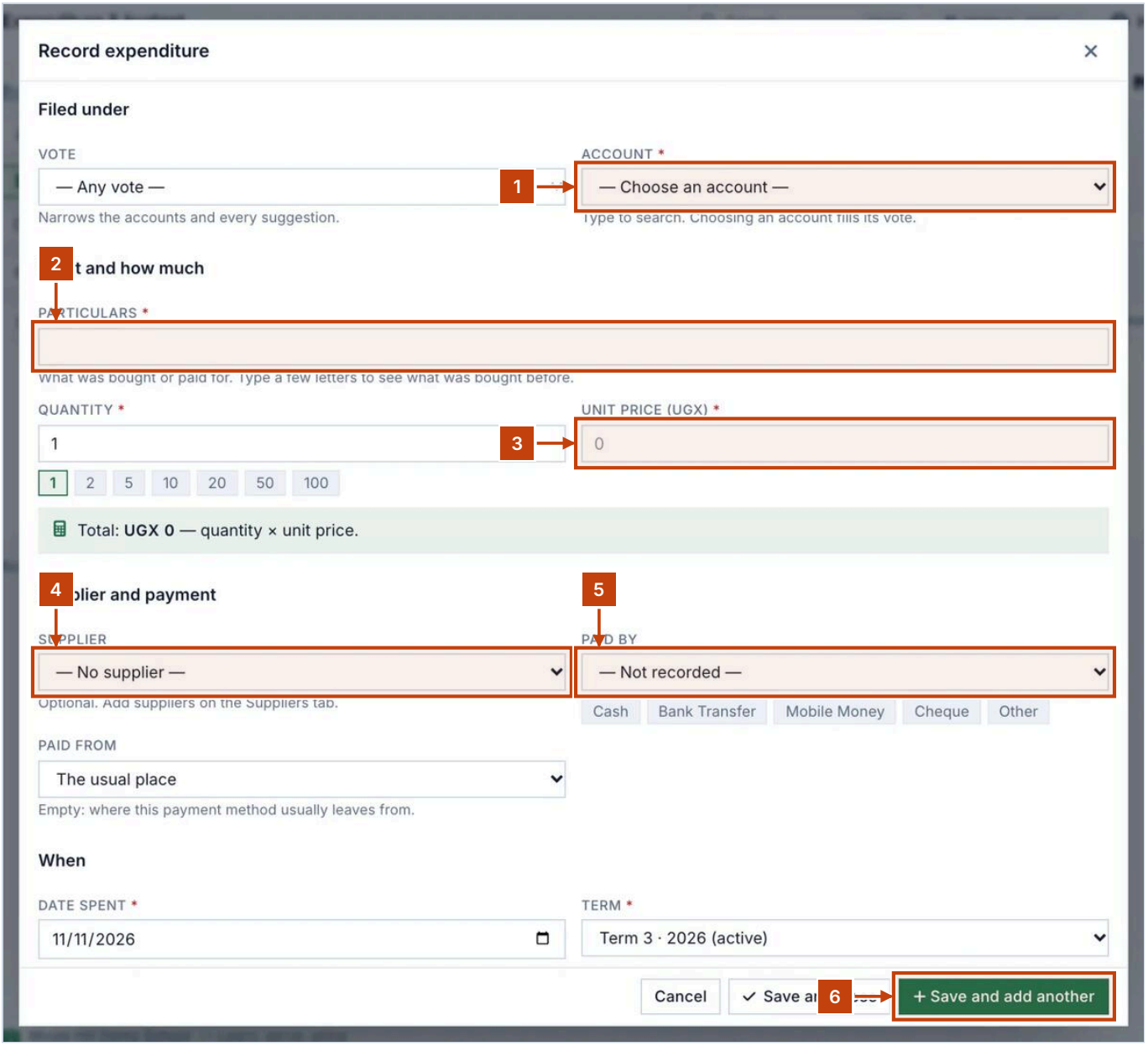
Every shilling the school spends is recorded as an expenditure, filed under a budget account, so it counts against the budget. Something bought on credit is recorded the same way, with the part not yet paid; it then waits under **Creditors** until the supplier is paid.

Before you start

- The bursar, the finance officer and the school administrator record and change spending and pay creditors. The head teacher and the deputy can look.
- The school needs its votes and budget accounts: see Votes and budget accounts.
- Suppliers are optional on a line. They are added under Procurement › Suppliers.

Record an expenditure

Record expenditure is on the Budget & expenditure page, on its **Expenditure & budget** tab and on each account's page. From an account's page, the dialog opens already on that account.



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1. The budget account the spending is filed under.
2. Particulars: what was bought or paid for.
3. Quantity × unit price makes the amount.
4. Optional: the supplier.
5. How it was paid.
6. Save and stay for the next line.

1. Press **Record expenditure**. The dialog opens on today's date and the active term.
2. Choose the **Account** 1. You can choose a vote first to shorten the list.
3. Type the **Particulars** 2: at least 4 characters, for example *Firewood, 2 lorries*.
4. Type the **Quantity** and the **Unit price (UGX)** 3. The total is shown under them.
5. Choose the **Supplier** if there is one 4.
6. Choose how it was paid under **Paid by** 5: Cash, Bank Transfer, Mobile Money, Cheque or Other. Leave **Paid from** on *The usual place* unless the money left from somewhere else, such as petty cash.
7. Check the **Date spent** and the **Term**. The date cannot be after tomorrow.
8. If the supplier is still owed part or all of it, tick **Bought on credit** and type what is **Still owed (UGX)**.
9. Press **Save and add another** 6 (or Enter) to record the next line, or **Save and close**.

A message confirms what was recorded, for example *Expenditure recorded: UGX 450,000 on Firewood.* As with budget lines, **Bought before** offers what was bought before (one click fills the account, particulars, quantity, unit price, supplier and payment), and **Paid before** offers earlier prices for the same particulars.

> ⚠ CAREFUL
>
> If the supplier you choose is already owed for things bought on credit, the dialog warns: *This supplier is owed … for things bought on credit.* If this money pays one of those, do not save it here. Use **Pay this credit** beside it, so the spending is not counted twice.

Changing a line

Open the line's menu on the **Expenditure & budget** tab and choose **Edit**. If you leave the quantity and the unit price as they are, the amount stays exactly as it was. Press **Save changes**.

- A line posted by a supplier invoice or by the payroll keeps its amount, account, term and credit; only its particulars, date and payment method change here.
- A line on credit cannot be switched to *not on credit* once something was paid on it, and its credit cannot be cut below what was already paid.
- Spending dated in closed books is refused: *The books are closed up to …*. Date it after that, or ask for the books to be reopened.

Creditors

A creditor is a supplier the school still owes. Open **Creditors** from the tab on Budget & expenditure, or from **Owed to suppliers**.

The figures at the top show what is **Still owed**, what is **Overdue**, how many credits are **Paid off**, and **Not in the budget** when old credits still need filing under an account. A strip below shows what is owed by how late it is: **Not yet due**, **1–30 days late**, **31–60 days late**, **61–90 days late** and **Over 90 days late**.

Choose how to look at them:

- **Credits**: each credit, with the tabs **All**, **Overdue**, **Pending**, **Partly paid** and **Paid**. Search by supplier, description or number (*#12*), and narrow by supplier or by the term it was bought in.
- **By supplier**: each supplier with what was bought on credit, paid, still owed and overdue, and the next due date.
- **Term movement**: for a term, each credit's brought forward, new this term, paid, and carried forward. **As a report** opens it in the report library.

When you open the page, every unpaid credit past its due date becomes **Overdue**. A credit due today is not overdue yet.

Pay a credit

1. Press **Pay** on the credit.
2. Type the **Amount paid (UGX)**. It starts at what is still owed, and cannot be more.
3. Check the **Payment date**, **Paid by**, **Paid from** and the **Reference or receipt no.**
4. Press **Record payment**.

The credit becomes **Partly paid**, or **Paid** when nothing is left. A payment for more than is owed is refused: *That is more than is owed.*

Pay a supplier one sum

When one payment covers several credits of the same supplier:

1. Choose **By supplier**.
2. Press **Pay supplier** on the supplier's row.
3. Type the **Amount paid (UGX)**. It starts at everything owed to them here.
4. Fill in the date, how it was paid and the reference.
5. Press **Record the payment**.

The sum is spread over the supplier's credits, the one due first paid first. **How it is spread**, in the dialog, shows what each credit gets as you type the amount.

> GOOD TO KNOW
>
> A credit from a supplier invoice shows **Pay in Procurement** instead of **Pay**. It is paid in Supplier invoices, so the payment voucher, the invoice and its order stay together. **Pay supplier** leaves those credits out.

Add a credit by itself

Press **New credit**, then choose what it is:

- **Bought on credit now**: something bought on credit that is not recorded yet. Choose the **Budget account**, **Bought on** and **Term**, say **What was bought on credit** and the **Amount owed (UGX)**. It is recorded as spending under that account, and owed here.
- **Owed before the books**: a debt from before the school kept its books here, such as the balance on construction works. Give **Owed since** and what is **Still owed (UGX)**. It is brought forward and never counted as spending again.

Add a **Due date** if there is one (after it, the credit turns Overdue), and press **Add credit**.

Other jobs on a credit

- **File**: an old credit marked *not in the budget* is filed under a budget account with **File** › **File it**, so it counts as spending.
- **Payments (...)** in the row menu lists the payments made. A wrong payment can be deleted there with its bin; the amount is owed again. A supplier invoice's voucher payment cannot be deleted here.
- **Edit**: a credit that came from an expenditure takes its supplier, description and amount from that expenditure; change those on the expenditure. Here you change the due date, the expected payment method and the notes.
- **Delete**: only for a credit with nothing paid. A credit that came from an expenditure is deleted with its expenditure line.

Export downloads the credits shown as a CSV file.

What happens next

- The expenditure counts in **Spent** for its account and term at once, and in the reports.
- The Books of account write it themselves: spending out of the money place it was paid from; a credit owed to suppliers; a payment to a creditor out of the money place.
- Nothing here changes a student's balance.

QUESTIONS

I paid a supplier for something we bought on credit last month. Do I record expenditure?

No. Pay it from **Creditors** with **Pay**. The spending was counted when the goods were bought on credit; recording it again would count it twice.

Why can I not pay a credit in full here?
A payment is never more than is still owed. If the credit came from a supplier invoice, it is paid in **Procurement › Supplier invoices**, with its payment voucher.

Can I change the amount of an expenditure?
Yes, with **Edit**, unless it is dated in closed books or was posted by a supplier invoice or the payroll. If you leave the quantity and the unit price as they are, the amount does not change.

When does a credit become Overdue?
The day after its due date. Opening the Creditors page marks every unpaid credit past its due date as Overdue.

Plan income and record income that is not fees

Set up the school's income sheet, plan what each source should bring in a term beside what came in, and record other income such as a tour or an asset sold.

For: Bursar, School owner · app.schooldynamics.ug/help/finance/income

Income is the other half of the budget. It holds the school's income sheet (every source of income), the income you expect from each source in a term beside what really came in, and money received that is not a student's bill: an old vehicle sold, a tour, uniforms sold for cash.

Open it from **Fees & finance › School finance › Income**. It has three tabs: **Proposed against actual**, **Other income received** and **Income sheet**.

Before you start

- The bursar, the finance officer and the school administrator change the sheet, the plan and other income. The head teacher and the deputy can look.
- Fees, bursaries and services should be set up, because the sheet is made from them.

Set up the income sheet

The first time, the page says the school has no income sheet yet.

1. Press **Set up from what the school has**. The sheet is made with one fees line for each group of classes that pay the same fee, each bursary scheme, boarding and transport, the service categories, the store, money held and the usual other income.
2. Open the **Income sheet** tab and read through it.
3. Rename a line with its pencil, or take it out with its bin.
4. Add what is missing with **Line** in its section, or **New line** at the top.

The sheet is in sections: **School fees**, **Boarding**, **Transport**, **Uniforms and services**, **Other income**, **Debtors**, **Stock at term opening** and **Money at term opening**. The arrows move a line up or down.

A line and where its figure comes from

Each income line says where its actual comes from (**Its actual comes from**):

Choice	The line counts
Fee bills of chosen classes or bursary schemes	The fee bills, less bursaries, of the students in the classes or bursary schemes you tick. A bursary line counts its students first, so each child is counted once.
Service bills	Bills of the services, or whole service categories, you tick. Fill in **Only bills of this amount** to count one rate.
Other income recorded here	What you record under **Other income received**.
Fees owed, brought into the term	What students owed when the term began.
Staff advances and loans owed	What staff owed the school when the term began.
Store value at the term's start	The store items you tick (none ticked: every item).
Money held at the term's start	The money places you tick (none ticked: all).
Typed on the plan	Nothing by itself: you type its actual on the plan.

Press **Save**. A line that has other income recorded under it cannot be removed: move or delete that income first. **Add what is missing** adds lines from the school's classes, bursaries, services and store that the sheet does not have yet.

Plan the term's income

On **Proposed against actual**, choose the **Term**. For each line, type the **Proposed qty** and **Proposed rate**, for example 120 pupils × UGX 450,000. The page shows:

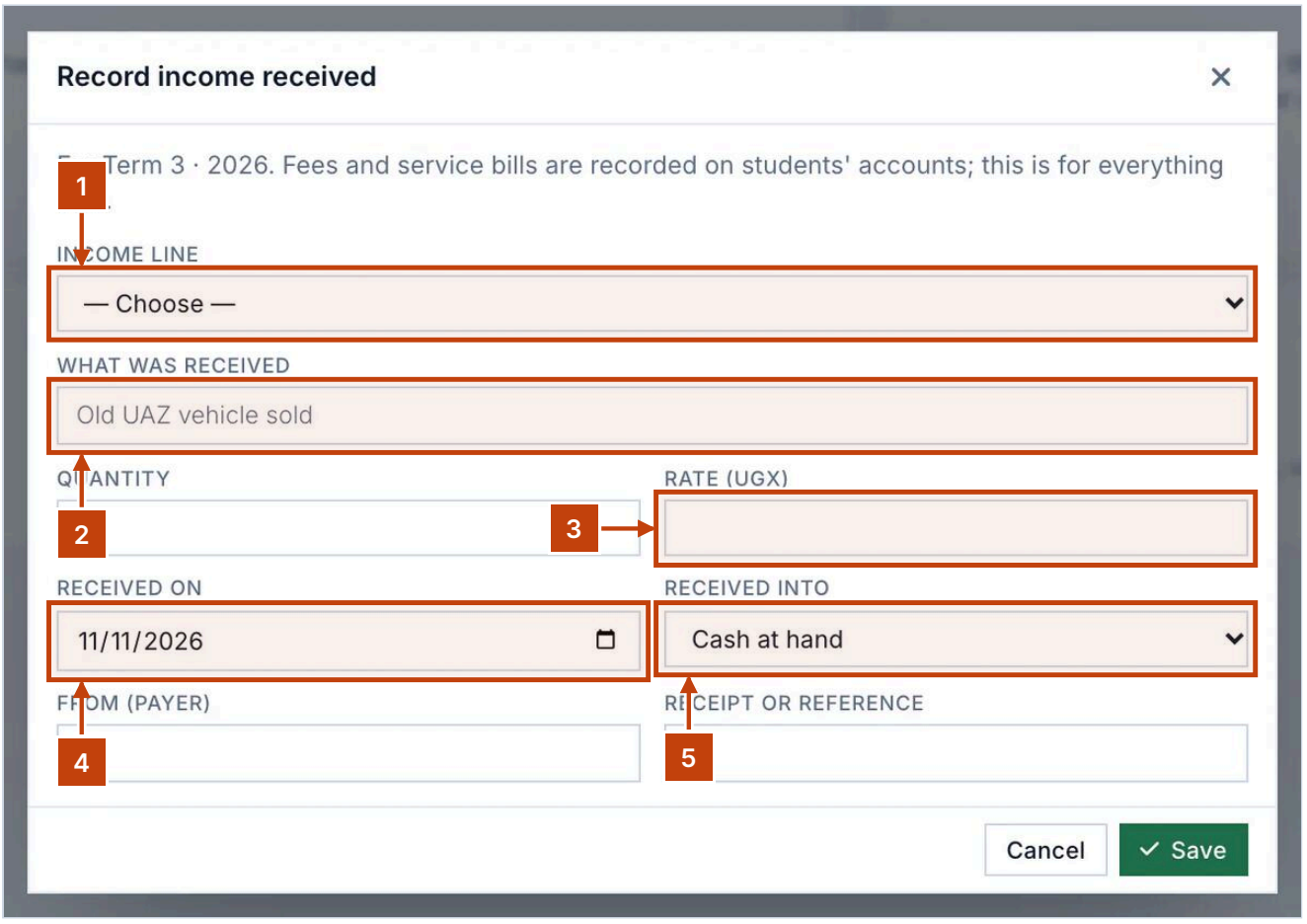
- **Proposed**: quantity × rate.
- **Actual qty** and **Actual**: what really came in. For lines **Typed on the plan**, type them.
- **Variance**: actual less proposed. A shortfall is shown in brackets, in red.

Press **Save the plan for ...** (the term's name). To start from another term's plan, choose it under **Copy the plan of** and press **Copy**.

A row **Fees not in a category** counts fees of students that no fees line covers. If it is large, a class is missing from your fees lines.

Record other income

Use it for money that is not a student's bill: an asset sold, a tour, uniforms sold for cash, registration, a grant.



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1. The income line it belongs to.
2. What was received.
3. Quantity × rate makes the amount.
4. The day it was received.
5. Where the money went: cash at hand, a bank or another money place.

1. Open **Other income received** and choose the **Term**.
2. Press **Record income**.
3. Choose the **Income line** 1. Only lines whose actual is *Other income recorded here* are offered.
4. Type **What was received** 2, for example *Old school van sold*.
5. Type the **Quantity** and the **Rate (UGX)** 3.
6. Check **Received on** 4. It cannot be in the future.
7. Choose where it went under **Received into** 5. It starts at *Cash at hand*.
8. Add **From (payer)** and the **Receipt or reference** if you have them.
9. Press **Save**.

The list shows each amount received in the term, with its total. Narrow it to one line with the line list. Change an entry with its pencil, or delete it with its bin.

> ⚠ CAREFUL
>
> Income dated in closed books cannot be added, changed or deleted. The page says *The books are closed up to ....*

Good to know

- **Income schedule** at the top opens the committee's income schedule for the term: every source, proposed against actual, then spending and the surplus. See Committee reports.
- Other income goes into the Books of account by itself, into the money place you chose.
- The **Income sheets** under **Finance reports** are something else: printed lists of fee payments for a period. See Finance reports.

QUESTIONS

Do I record fees here?
No. Fees and service bills are recorded on students' accounts, and their payments under **Payments**. This page counts them by itself; record here only money that is not a student's bill.

Where do the actual figures come from?
From the fees ledger (bills less bursaries), service bills, other income recorded here, and the books on the term's first day (money held, fees owed, the store's value).

Can I copy last term's plan?
Yes. On **Proposed against actual**, choose last term under **Copy the plan of** and press **Copy**. Lines you already planned this term are left as they are.

Ask finance for funds, and approve or reject requests

Any member of staff asks for money to buy a store item; the bursar approves or rejects it, naming the accounts the funds move between.

For: Everyone, Bursar · app.schooldynamics.ug/help/finance/fund-requests

A fund request asks finance for money to buy something for the store: so many bags of sugar, a box of chalk. Any member of staff can ask. The bursar approves or rejects each request, and an approved request is final.

Open it from **Fees & finance › School finance › Fund requests**. Every member of staff has this menu entry. For finance staff it is also the last tab of Budget & expenditure.

Before you start

- Every member of staff can ask, and sees their own requests.
- The bursar, the finance officer and the school administrator see every request and decide. The head teacher and the deputy see every request, but do not decide.
- The item must be in the store first. If the item list is empty, the dialog says *The store has no items yet. Ask the store keeper to add the item first.* See Stores.

Ask for funds

1. Press **New request**. The dialog **Ask for funds** opens.
2. Choose the **Store item**.
3. Type the **Quantity** needed.
4. Type the **Total amount (UGX)**: at most UGX 999,999 per request.
5. Add a **Description** if it helps finance decide.
6. Attach the **Invoice or quotation**, a photo or a PDF up to 5 MB, if you have one.
7. Press **Send request**.

The message says *Request for UGX … sent to finance.* The request shows as **Waiting** in the list.

Follow your requests

The list has the tabs **All**, **Waiting**, **Approved** and **Rejected**, and a search by item or description. **Waiting for a decision** at the top counts the requests waiting and the money asked for.

Click a request's number to open it. While it is not approved, its row menu offers **Edit** and **Delete** to the person who asked and to finance.

Decide on a request

For the bursar, the finance officer and the school administrator.

1. Press **Decide** on the request. The dialog **Approve or reject the request** says who asks for how much, for what.
2. Choose **Approve** (*Funds are released. This cannot be undone.*) or **Reject** (*The person can change the request and ask again.*).
3. To approve, choose where the **Funds come from** and where the **Funds go to**: the school's own accounts, with their balances.
4. Press **Approve request** or **Reject request**.

The request shows who decided, and for an approved one, the two accounts.

> ⚠ CAREFUL
>
> An approval cannot be reversed, and the request can then no longer be edited or deleted. Check the amount and the invoice before you approve.

Good to know

- Approving records the decision only. It moves no money in the ledger and puts nothing in the store. Record the delivery in **Stores** when the goods arrive, and record the money spent with **Record expenditure** (see Record spending).
- A rejected request can be changed by the person who asked; finance then decides on it again with **Decide**.
- **Export** downloads the requests shown (your own, or every request for finance) as Excel or CSV.

QUESTIONS

Who can see my request?
You and the finance staff. Other members of staff see only their own requests.

Can I change a request after it is approved?
No. An approved request cannot be changed or deleted. Ask for a new one if something is different.

My request is for more than UGX 999,999. What do I do?
Split it into several requests, or ask for the purchase through Purchase requests, which has no such limit.

Does approving put the items in the store?
No. Approving records the decision only. When the goods arrive, the store keeper records the delivery in **Stores**.

Keep the books of account

The school's double-entry books, written by themselves from fees, spending, credits and other income. Get them ready, post journals, reconcile banks and close a term.

For: Bursar, School owner · app.schooldynamics.ug/help/finance/books-of-account

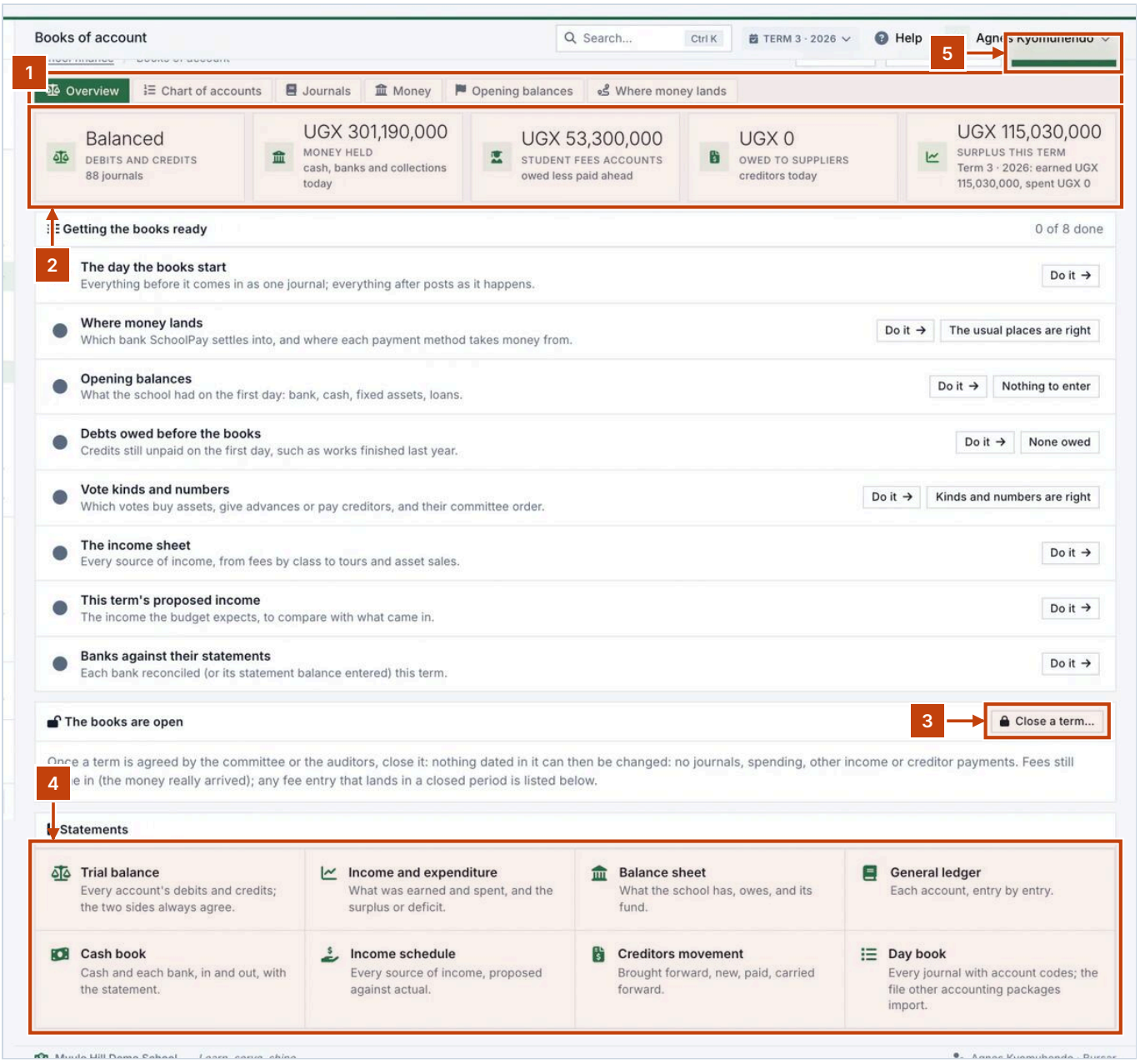
The **Books of account** are the school's double entry books. You do not type into them twice: fees, spending, credits, payments to creditors and other income each post themselves as a balanced journal. The trial balance, income and expenditure account, balance sheet, general ledger and cash book are made from them.

Open them from **Fees & finance › School finance › Books of account**. The page has six tabs: **Overview**, **Chart of accounts**, **Journals**, **Money**, **Opening balances** and **Where money lands**.

Before you start

- The bursar, the finance officer and the school administrator make changes. The head teacher and the deputy can read everything.
- The books are only as good as what is recorded: fees and payments, expenditure, creditors and other income.

The overview



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1 The six parts of the books.

2 Whether the books balance, money held, owed by students and to suppliers, and the term's surplus.

3 Close a term once the committee or the auditors agree it.

4 The statements: trial balance, income and expenditure, balance sheet and more.

5 Post a journal for what nothing else records.

The figures 2 :

Figure	Means
Debits and credits	**Balanced** when the two sides agree, as they always should.
Money held	Cash, banks and collections today.
Student fees accounts	What students owe, less what they paid ahead.
Owed to suppliers	Creditors today.
Surplus this term / Deficit this term	What was earned less what was spent, in the term chosen in the top bar.

Statements 4 opens each report in the report library: **Trial balance**, **Income and expenditure**, **Balance sheet**, **General ledger**, **Cash book**, **Income schedule**, **Creditors movement** and **Day book** (every journal with account codes, the file other accounting packages import). See Committee reports.

Get the books ready

Until everything is in place, the overview shows **Getting the books ready**, with each step and whether it is done:

1. **The day the books start.** Everything before it comes in as one journal; everything after posts as it happens. Set it under **Where money lands**.
2. **Where money lands.** Which bank SchoolPay settles into, and where each payment method takes money from. If the usual places are right, press **The usual places are right**.
3. **Opening balances.** What the school had on the first day: bank, cash, fixed assets, loans. If there is nothing, press **Nothing to enter**.
4. **Debts owed before the books.** Credits still unpaid on the first day: add each one in Creditors as *Owed before the books*, or press **None owed**.
5. **Vote kinds and numbers.** Which votes buy assets, give advances or pay creditors, and their committee order: see Votes and budget accounts.
6. **The income sheet** and **This term's proposed income**: see Income.
7. **Banks against their statements.** Each bank reconciled, or its statement balance entered, this term (see **Money** below).

Do it on a step takes you where it is done. A step you marked done yourself can be taken back with **Undo**.

Where money lands

On the **Where money lands** tab:

- **The books start on**: the first day of the books. Leave it empty to post everything from the beginning.
- **Fees received through**: for SchoolPay, cash payments, bank payments, PegPay, the bursar's app and online (Pesapal), the money place the money goes into.
- **Spending and creditor payments paid by**: for each payment method, the money place it leaves from, and the **Main bank** for transfers and cheques.

The usual place is right for most schools: a fee payment's own bank account, cash into cash at hand, transfers and cheques from the main bank, mobile money from the mobile money account. Press **Save**.

Opening balances

On **Opening balances**, choose the day (**On**) and type each balance on its usual side: what is in each bank, what the furniture is worth, what a loan still owes. The difference goes to the opening fund. Press **Save opening balances**. **Another asset** adds an account for something not listed.

Two things do not go here: student balances come from their fees accounts, and debts to suppliers from **Creditors › New credit › Owed before the books**.

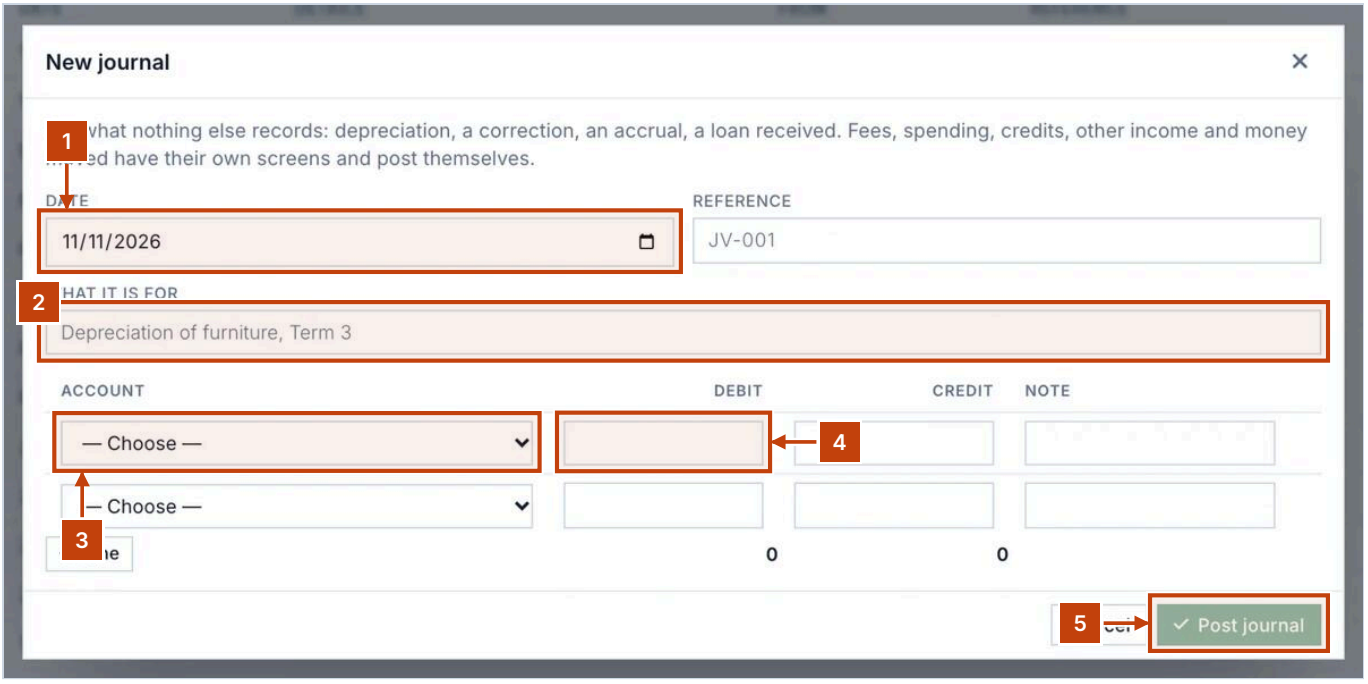
Journals

The **Journals** tab lists every entry: date, details, what it came from (**Fees ledger**, **Spending**, **Credit**, **Payment to a creditor**, **Other income**, **Journal**, **Money moved**, **Opening balances** ...), reference and amount. Narrow it by kind or search the details. Click one to see its lines.

A journal that came from a record says so: change or delete that record, and the journal follows. A journal or money move you posted here can be undone with **Reverse**, which posts its mirror image today.

Post a journal

For what nothing else records: depreciation, a correction, an accrual.



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1 The journal's date.

2 What it is for.

3 An account for each line.

4 A debit or a credit on each line, never both.

5 Posts only when debits equal credits.

1. Press **New journal**.
2. Set the **Date** 1 and a **Reference** if you have one.
3. Type **What it is for** 2.
4. On each line, choose the account 3 and type a debit or a credit 4. Press **Line** for more lines.
5. Press **Post journal** 5. It stays greyed until the debits equal the credits.

A journal needs at least two lines, and a line cannot have both a debit and a credit.

Quick entry

Quick entry posts common journals for you: **Loan received**, **Loan repayment** (with its interest), **Staff advance repaid**, **Capital grant or contribution** and **Depreciation**. Fill in the amount, the money place and who it is with, check the lines it shows, and press **Post**. For depreciation, the asset register's fall in value this term is offered: press **Use it**.

Chart of accounts

The **Chart of accounts** tab lists every account by type: **Assets**, **Liabilities**, **Fund**, **Income** and **Expenses**, each with its code and balance today. **Ledger** opens the account entry by entry.

New account (or **Add** under a type) asks for the **Type**, a **Code** of 3 to 6 digits in the type's range, the **Name** and a **Note**. Tick *Money is kept here* for a new money place, such as petty cash or a savings account, so money can be paid from it and received into it. Accounts marked *Kept by the books* can be renamed or deactivated, but not deleted. An account named after a vote or a bank is renamed by renaming that vote or bank. An account with entries is deactivated, not deleted, so its history stays.

Money

The **Money** tab lists each money place with its balance in the books today, the last statement balance and the difference (**Agrees** when there is none).

- **Move money from here...** (or **Move money** at the top): cash banked, bank to petty cash, SchoolPay settled into the bank. It is neither income nor spending.
- **Statement balance only...**: what the bank statement says the place held at the end of a day.
- **Cash book**: the place's money in and out, with the running balance.

Reconcile a bank

1. Press **Reconcile** on the bank.
2. Type the **Statement's last day** and its **Closing balance (UGX)**. Press **Start**.
3. Tick each entry the statement shows. **Tick all** and **Untick all** help.
4. Watch the **Difference**. At *Nil*, everything is accounted for.
5. Press **Finish reconciliation**. If a difference remains, say **Why it differs** first, for example a deposit the bank has not credited yet.

Bank charges are recorded as spending, and interest as other income. **Discard** throws away an unfinished reconciliation and its ticks.

> GOOD TO KNOW
>
> This reconciles the books' bank account with its statement. Bank reconciliation under Collections is different: it matches a statement's deposits to fee receipts.

Close the books

Once the committee or the auditors agree a term, close it.

1. On the overview, press **Close a term...** (or **Close further...**).
2. Choose a term that has ended, or a day under **Close up to and including**. It must be yesterday or earlier.
3. Press **Close the books**.

From then on, nothing dated on or before that day can be added, changed or deleted: journals, money moved, opening balances, spending, other income, creditor payments. Someone who tries is told *The books are closed up to ….*

Fees still come in, because the money really arrived. A fee entry that appears or changes in the closed period is listed on the overview, under *entries changed after the books closed*. Press **Noted** on each, or **Mark all noted**.

To change something in a closed term, press **Reopen…**, say **Why** (it is kept in the finance audit log), and choose **Keep closed up to** to reopen only part. Press **Reopen**.

> ⚠ CAREFUL
>
> Close only what has been agreed. Reopening is recorded with your name and reason.

QUESTIONS

Do I have to type every payment and expenditure into the books?
No. Fees, spending, credits, payments to creditors and other income post themselves as balanced journals. A journal is typed only for what nothing else records: depreciation, a loan, a correction.

The overview says Out of balance. What do I do?
Debits and credits should always agree, and every journal balances on its own, so this should not happen. Tell the School Dynamics team from the Help menu.

A fee payment arrived for a term we closed. Is it refused?
No. Fees are never refused, because the money really arrived. The change is listed on the overview, under *entries changed after the books closed*, until you press **Noted**.

Can I change a journal that came from a payment or an expenditure?
No. Change or delete the payment or the expenditure itself, and its journal follows. Only journals and money moves you posted here can be reversed here.

Read the term's finance reports

The term summary of fees billed, paid and owed by class, collections day by day, students' balances, and income sheets to print.

For: Bursar, Head teacher, School owner · app.schooldynamics.ug/help/finance/finance-reports

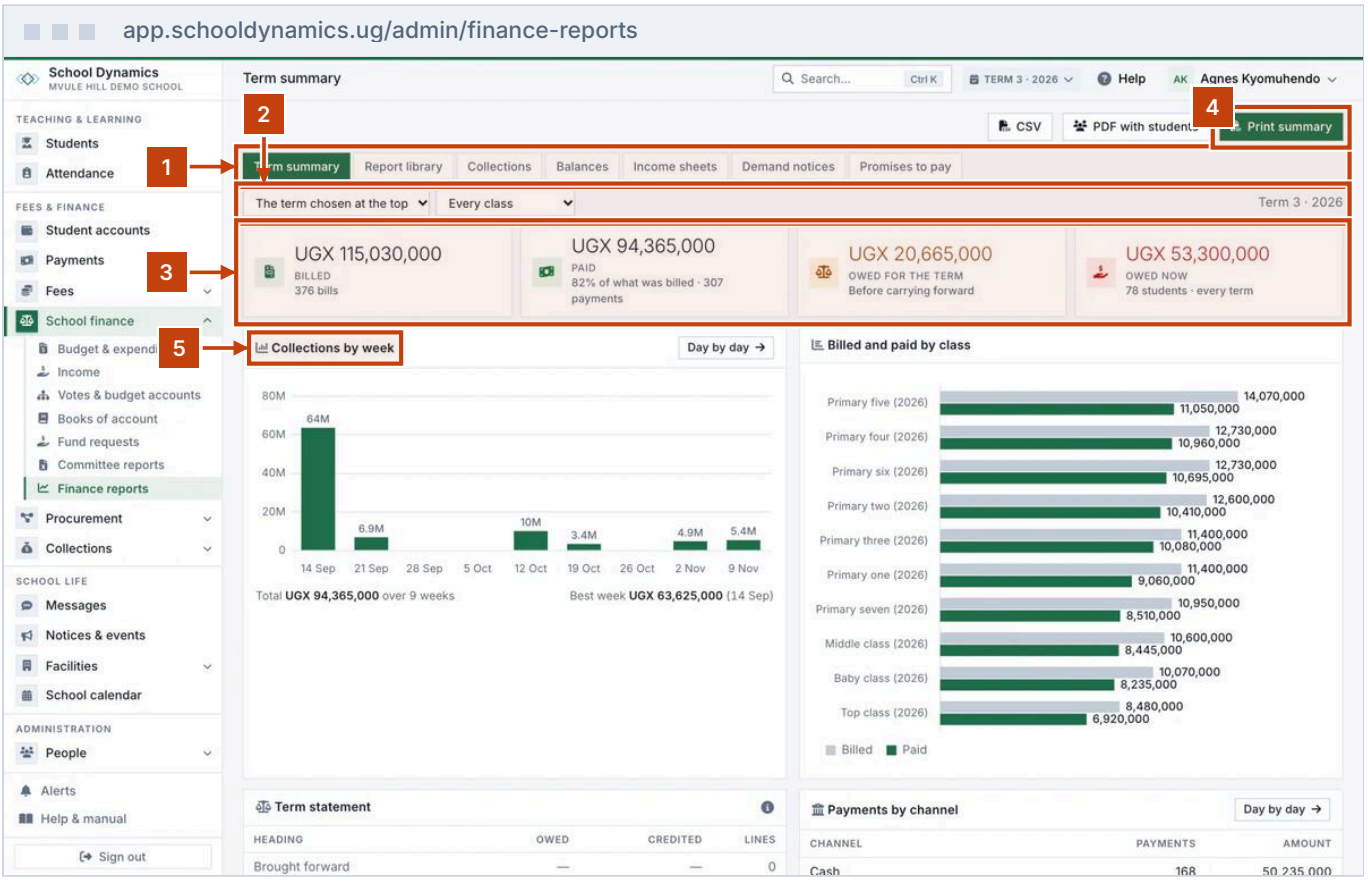
Finance reports answer the questions a head teacher and a board ask about fees: how much was billed this term, how much came in, through which channel, and who still owes. Each page prints and downloads.

Open them from **Fees & finance › School finance › Finance reports**. The tabs along the top are **Term summary**, **Report library**, **Collections**, **Balances**, **Income sheets**, **Demand notices** and **Promises to pay**.

Before you start

The bursar, the finance officer, the school administrator, the head teacher and the deputy can read every report. Only the first three make or change income sheets.

Term summary



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1 The report pages, one tab each.

2 The term (the one in the top bar to start), and a class or stream.

3 Billed, paid, owed for the term and owed now.

4 The summary as a PDF to print.

5 Payments week by week. Day by day opens the collections.

The page starts on the term chosen in the top bar 2. Choose another term, or a class (then a stream), to see only part of the school. **Whole school** goes back.

The four figures 3:

Figure	Means
Billed	Every bill of the term, with the bursaries given.
Paid	Every payment of the term, and what share of the bills that is.
Owed for the term / **In credit for the term**	The term's balance, before carrying forward.
Owed now	What students owe today, every term together. Click it for the balances list.

Below them:

- **Collections by week** 5 and **Billed and paid by class**, as charts.
- **Term statement**: every fees line of the term under one heading each, *Owed* (charged) and *Credited* (paid or taken off), then the term balance and what was carried to the next term.
- **Payments by channel**: SchoolPay, cash, bank and the rest, with the bank.
- **By class** (or **By stream**): students, brought forward, billed, bursaries, adjustments, paid and owed for the term. Click a class for its students, each with what they owe now; **streams** beside a class shows its streams.

Print summary 4 makes a PDF. **PDF with students** adds every student's line, and **CSV** downloads the figures for a spreadsheet.

Collections

Collections shows the money received, day by day. Choose the period: **Today**, **This week**, **This month**, **Last month**, **A term** or **Dates**. Narrow by channel, bank account, class or stream; **Clear filters** starts again.

The page shows what was **Collected**, how many **Payments**, the amount **Per day with payments** and a figure for each channel. Then:

- a table of each day, with a column for each channel;
- **By bank account**;
- every payment, with a search by student, registration number or receipt. The printer icon opens a payment's receipt.

Print makes a PDF, **PDF with payments** adds the list of payments, and **CSV of payments** downloads them.

Balances

Balances lists students with what they owe or have paid ahead, today. The tabs are **Owing**, **Paid in advance** and **Everyone**. The figures at the top add up what is **Owed**, what is **Paid ahead** and the net.

Narrow it by name, registration number or payment code; by current class and stream; by residence (day or boarding); by status (**Active** is the default); or to students **Owing at least...** an amount. Click a column heading to sort by student, balance or last payment. Click a name for the student's account.

The icons on a row record a payment for that student, or a promise to pay when they owe. **Print list** makes a PDF of the list as filtered, and **CSV** downloads it.

Income sheets

An income sheet is a printed list of every fee payment in a period, with a running total, on the school's letterhead. It is useful for a month's banking or for the board.

1. Press **New income sheet**.
2. Type a **Title**.

3. Fill the dates with **This month**, **Last month**, **This quarter** or **Active term**, or type the **First day** and **Last day**.
4. Choose the **Students**: **Day and boarding**, **Day scholars only** or **Boarders only**.
5. Tick the **Payment channels** to include, or none for every channel.
6. Press **Save sheet**.

Print opens the sheet as a PDF; the list then marks it **Printed**. The row menu has **Edit**, **Day by day** (the same period on the Collections page) and **Delete**.

> GOOD TO KNOW
>
> These income sheets are lists of fee payments. The income sheet on the Income page is something else: the school's sources of income, planned against what came in.

Other tabs

- **Report library**: every report as a table you shape, with Excel and PDF, and the committee pack. See Committee reports.
- **Demand notices**: see Reminders and demand notices.
- **Promises to pay**: see Promises to pay.

QUESTIONS

Why is "Owed for the term" different from "Owed now"?
Owed for the term counts only the chosen term's lines, before anything is carried forward. **Owed now** is what students owe today across every term.

Do these figures include SchoolPay and the mobile app?
Yes. Payments count from every channel, including SchoolPay, cash, bank, PegPay, the mobile app and split payments.

Where are the budget and spending reports?
In the **Report library** tab: see Committee reports.

Prepare reports for the finance committee

The report library for a finance committee or board. Shape any report, save the view, export Excel with formulas or PDF, and make the committee pack in one file.

For: Bursar, Head teacher, School owner · app.schooldynamics.ug/help/finance/committee-reports

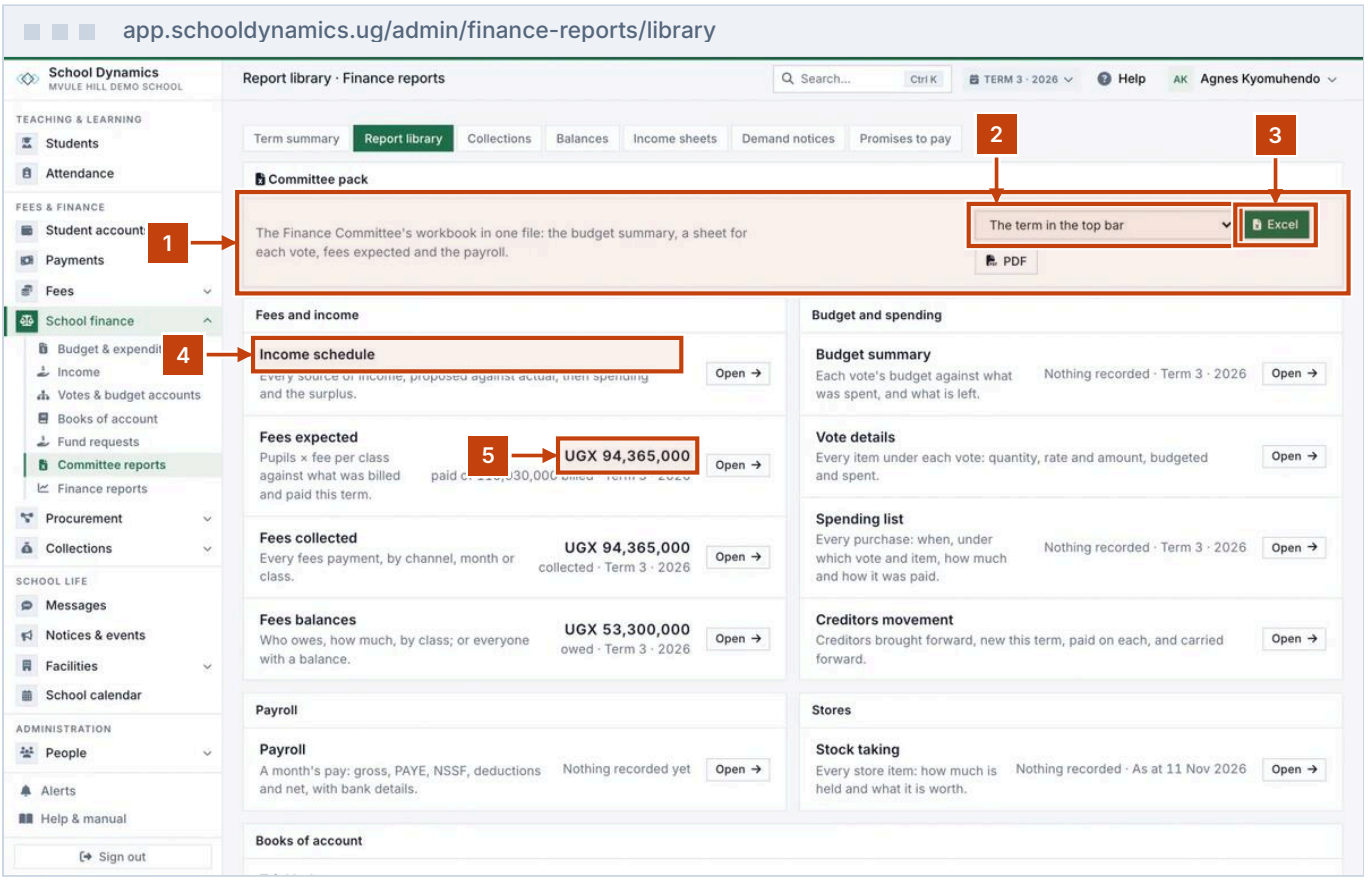
The report library holds the reports a finance committee, a board or the auditors read: the budget summary and vote details, the income schedule, fees expected, the payroll, stock and the books of account. Each one opens as a table you can shape, save and export. The **committee pack** puts the committee's workbook in one file.

Open it from **Fees & finance › School finance › Committee reports**. It is also the **Report library** tab of Finance reports, the **Committee reports** button on Budget & expenditure and the **Reports** button in the Books of account.

Before you start

- The bursar, the finance officer, the school administrator, the head teacher and the deputy can run the reports. The **Payroll** report is only for those who may see the payroll.
- The reports are only as complete as the records: budget lines and spending, votes with their committee numbers, the income sheet and its plan, and the books.

The library



The demo school · invented names and figures

1 The committee pack: the committee's workbook in one file.

2 The term of the pack.

3 Prepare it as Excel (or PDF).

4 Open a report.

5 This term's headline figure.

The reports are listed by section, each with its headline figure for this term 5:

Section	Reports
Fees and income	Income schedule, Fees expected, Fees collected, Fees balances
Budget and spending	Budget summary, Vote details, Spending list, Creditors movement
Payroll	Payroll
Stores	Stock taking
Books of account	Trial balance, Income and expenditure, Balance sheet, General ledger, Cash book, Day book (all journals)

Click a report's name 4, or **Open**, to run it. Views you or your colleagues saved are listed under the report, as bookmarks.

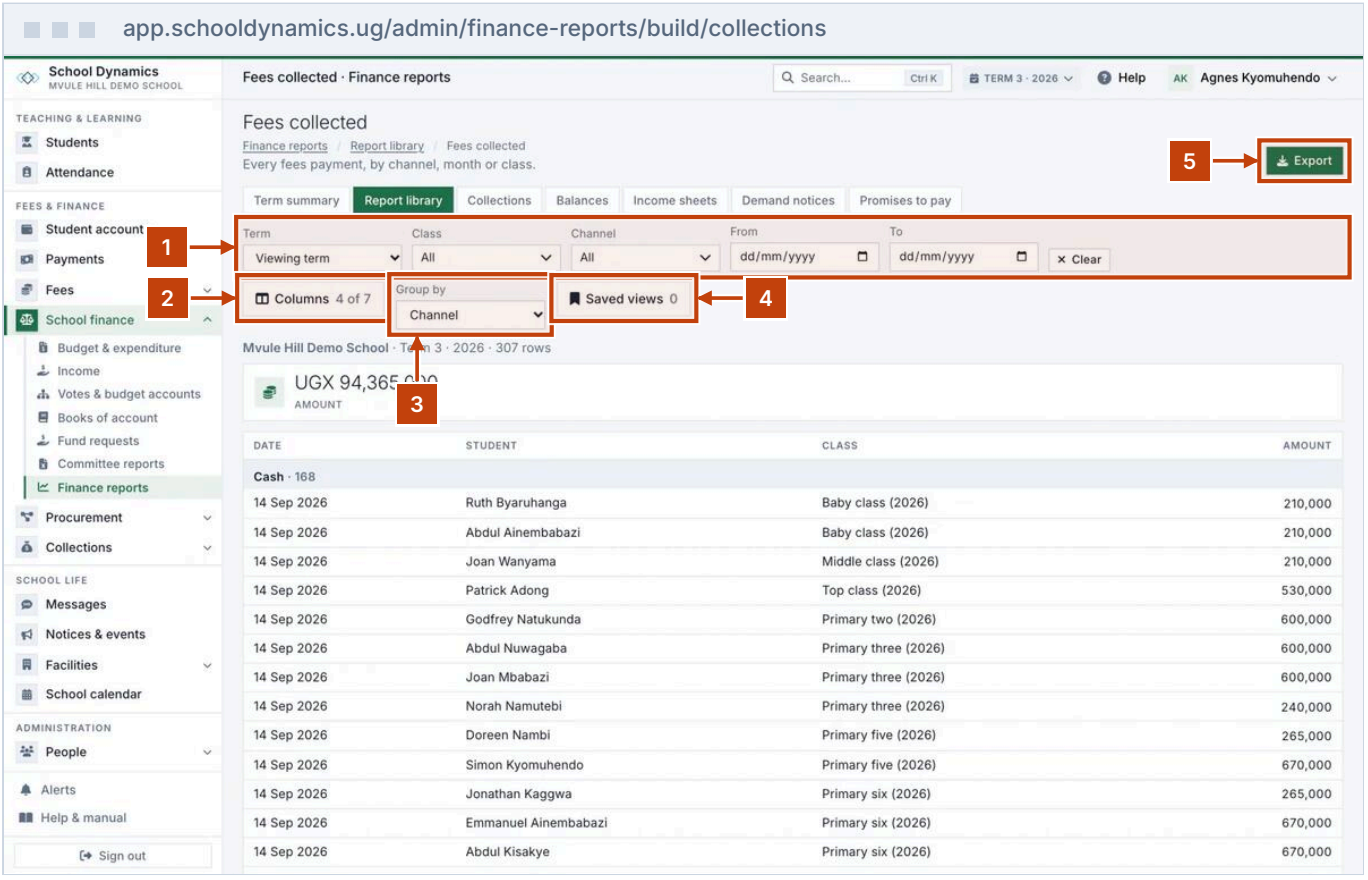
Make the committee pack

The pack is the Finance Committee's workbook in one file: the budget summary, a sheet for each vote that has anything in the term, fees expected and the payroll.

1. Choose the term 2. *The term in the top bar* is the default.
2. Press **Excel** 3, or **PDF**.
3. Wait on the library. The pack appears under **Your exports** with *Preparing…*, then **Ready**.
4. Press **Download**.

Your exports lists the packs and large exports made for you. They are kept for 7 days.

Shape a report



The demo school · invented names and figures

1. Filters: the term, classes, channels…
2. Choose the columns and their order.
3. Group the rows, with a subtotal for each group.
4. Save this layout and its filters by name.
5. Excel with formulas, PDF to print, or CSV.

Each report opens with its filters 1. Which ones depend on the report: the **Term** (the term in the top bar to start), **Compare with** another term, the **Month** for the payroll, votes, lines, classes, channels, accounts, or

As at a day. **Show empty …** adds votes or items with nothing in them. **Clear** puts the filters back.

- **Columns** 2 : tick the columns to show and move them left or right. **Default layout** puts them back.
- **Group by** 3 : group the rows, for example fees collected by channel, month or class.
- Click a column heading to sort by it; click again to reverse.

The totals are shown above the table. The screen shows the first 500 rows; the totals and every export cover them all.

Save a view

Open **Saved views** 4 , type a name (*Transport, this term*) and press **Save view**. Tick **Share with the school** to let everyone who may run the report open it. A view you saved can be changed with **Update view**, copied with **Save as new**, or removed with **Delete**. Only the person who saved a view changes it.

Export

Open **Export** 5 :

- **Excel, with formulas**: totals stay live in the spreadsheet.
- **PDF to print**.
- **CSV**: plain figures for another program.

On the budget reports, the same menu also makes the **Committee pack (every vote)** as an **Excel workbook** or **PDF**.

A report with more than 2,000 rows is prepared in the background. The page says so; collect it from **Your exports** in the library.

Good to know

- The budget reports read the same lines as Budget & expenditure, and the income schedule reads the Income page.
- Trial balance, income and expenditure, balance sheet, general ledger, cash book and day book come from the Books of account.
- A report is a reading: running or exporting it changes nothing.

QUESTIONS

Why does the pack not appear at once?
It is prepared in the background. Stay on the library and it appears under **Your exports** with a **Download** button when it is ready. Files are kept for 7 days.

Why are the votes in the wrong order?
Reports list votes by their committee number. Set the numbers under Votes and budget accounts.

Can the auditors' software read the books?
Export the **Day book (all journals)**: every journal line by line with account codes, the file accounting packages such as QuickBooks, Sage or Tally import.

Why can I not see the Payroll report?

It is shown only to those who may see the payroll (the head teacher, the bursar and the school administrator).

09

Procurement

Buy for the school with a trail: requests, quotations, auctions, orders, goods received and supplier invoices.

Buying, step by step, with every approval recorded: from a purchase request to quotations or a reverse auction, a purchase order, the goods received and the supplier's invoice. Suppliers have their own portal.

How buying works	4 min
Ask for something to be bought	3 min
Ask suppliers for quotes and choose the best	3 min
Run a reverse auction	4 min
Write, approve and send a purchase order	3 min
Receive goods and write the goods received note	2 min
Check, approve and pay supplier invoices	3 min
Shop the supplier catalogue	3 min
Keep the list of suppliers	3 min
The supplier portal	5 min

How buying works

The road from a purchase request to a paid supplier, who does each step, and the paper each step prints.

For: Store keeper, Bursar, Head teacher, School administrator · app.schooldynamics.ug/help/procurement/how-buying-works

Procurement is how the school buys from suppliers with a trail: someone asks, a leader approves, procurement buys, the store counts what arrives, and finance checks the invoice and pays. Every step is recorded with who did it and when, gets a number, and prints.

Open it from **Fees & finance › Procurement › Overview**.

The steps

Step	Who	Where	What it prints
1. Ask	Any member of staff	Purchase requests	Purchase requisition (REQ-...)
2. Approve the request	Head teacher, deputy or school administrator, never their own	The request	—
3. Find the price	Procurement	Quotations or Auctions, or skip to an order	RFQ, comparison sheet, auction record
4. Order	Procurement writes it; an approver who did not write it approves it	Purchase orders	Local purchase order (LPO-...)
5. Accept	The supplier, on the supplier portal	—	—
6. Receive	The store keeper (or procurement)	Goods to receive	Goods received note (GRN-...)
7. Invoice	The supplier on the portal, or finance types in a paper one	The order	—
8. Check and approve	Finance	Supplier invoices	—
9. Pay	Finance, in full or in parts	Supplier invoices	Payment voucher (PV-...)
10. Close	Automatic, once received, invoiced and paid in full	—	Supplier statement

Every document has its own number, one series a year: REQ-2026-0001, RFQ-..., AUC-..., LPO-..., GRN-..., INV-..., PV-.... A number is never given twice, even when its document is cancelled.

Who does what

Role	May
Every member of staff	Ask for things (purchase requests) and browse the Supplier catalogue
Head teacher, deputy, school administrator	Approve or reject requests and purchase orders, never their own
Bursar, finance officer, purchaser, school administrator ("procurement")	Ask for quotes, run auctions, write and send purchase orders, look after suppliers
Store keeper, purchaser, bursar, school administrator	Receive goods and write the goods received note
Bursar, finance officer, school administrator ("finance")	Enter, approve, reject and pay supplier invoices

The head teacher, the deputy and the store keeper can also look at the procurement pages (supplier invoices only for those who see the school's finance). The school's owner may do everything.

The overview page

The top of **Procurement › Overview** shows three figures: **Ordered this year**, **On open orders** (approved and not yet closed) and **Paid to suppliers this year**.

What waits lists only what is waiting for someone, and only the rows you may act on: requests waiting for approval, approved requests to buy, quotations to compare and award, auctions live now or ended, orders to approve or send, deliveries announced, orders late for delivery, invoices to check, invoices overdue for payment, and suppliers' new bank details to confirm. Click a row to open that list. When nothing waits, the page says so.

Largest suppliers this year lists the six suppliers with the most ordered from them.

Use **New purchase request** to ask for something. Procurement also sees **Ask for quotes**.

Rules that protect the school

GOOD TO KNOW

- **Nobody approves their own work.** The person who asked cannot approve the request; the person who wrote an order cannot approve it.
- **Quotes are sealed** until the closing time. Before that, the school sees who has quoted, never the prices.
- **Choosing a dearer quote or bid needs a reason**, which is kept and printed.
- **An invoice can never be more** than the goods received and not yet invoiced. The same invoice number from the same supplier is refused a second time.
- **New bank details from a supplier wait** until finance confirms them.
- Every request, quotation, auction, order, delivery and invoice keeps a **History** of who did what.

How it joins the rest of the system

- **Budget.** A request and an order name a budget account. When approving a request, the approver sees that account's budget for the term, what is spent, and what is already committed in open orders.
- **Stores.** Goods received against a store item go into Stores at the order's price.
- **Spending and creditors.** Approving a supplier's invoice records it as spending bought on credit, on the order's budget account and term. It then shows under Budget & expenditure and Creditors, and in the committee reports. Paying the invoice pays that creditor.

Printing

Each page has its print button, which opens a PDF: **Print** on a request, **Print RFQ** and **Comparison sheet** on a quotation, **Auction record** on an auction, **Print LPO** on an order, **GRN** beside a delivery, and the payment voucher, which opens by itself after a payment. A supplier's statement prints from **Suppliers** (**Statement (PDF)** in the row's menu).

QUESTIONS

Can one person ask for something, approve it and pay for it?
No. Nobody approves their own request or an order they wrote, and only finance approves and pays invoices. On your own documents, the buttons do not show.

Is a purchase request the same as a fund request?
No. A fund request asks finance for money. A purchase request asks for goods or services that the school buys from a supplier, with quotes, an order and a delivery.

Where do the figures go once a supplier is paid?
An approved invoice is recorded as spending on credit on the order's budget account. It shows under Budget & expenditure and Creditors, and in the committee reports, with no second set of figures.

Ask for something to be bought

Write a purchase request, send it for approval, and follow it until it is ordered. For approvers, how to approve or reject one with its budget in view.

For: Everyone, Head teacher, School administrator · app.schooldynamics.ug/help/procurement/purchase-requests

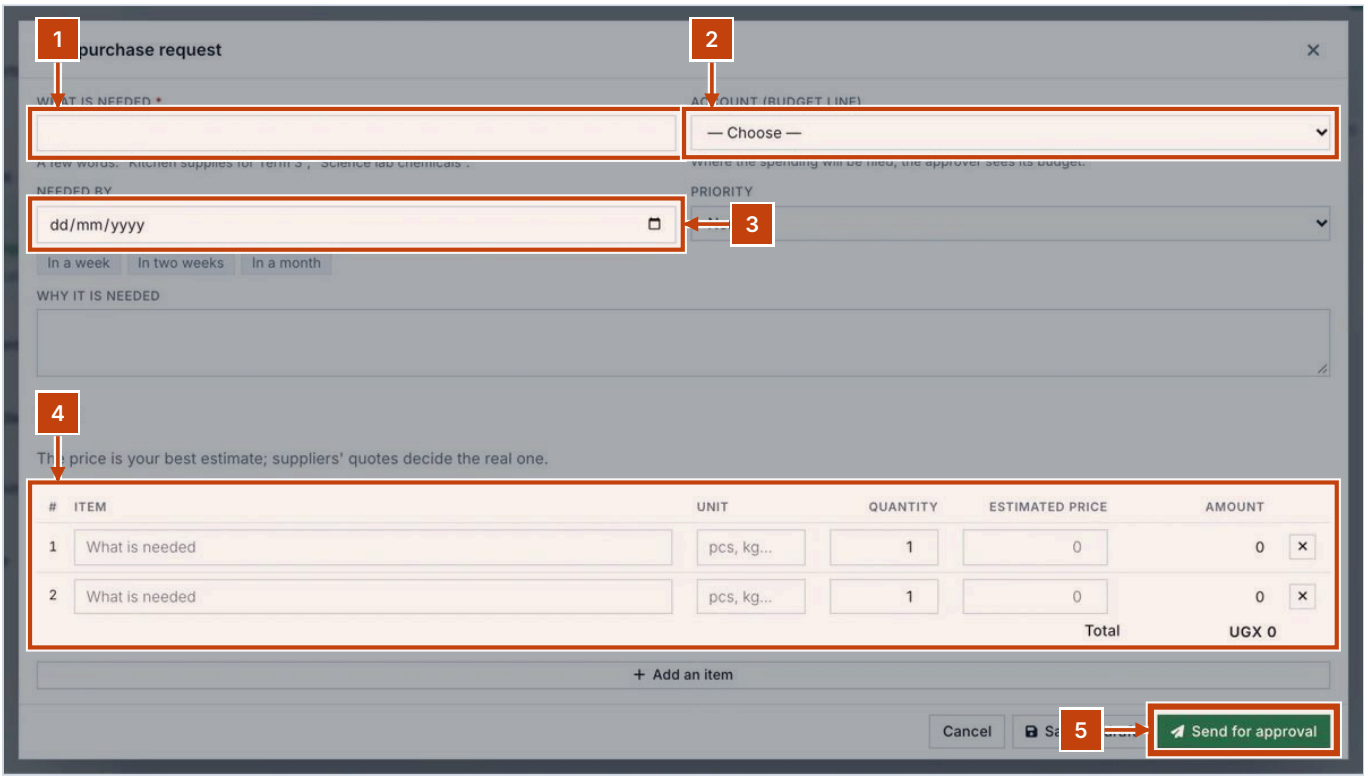
A purchase request is how anyone on the staff asks for goods or services: kitchen supplies for the term, chemicals for the lab, a repair. A leader approves it, then procurement buys it.

Open it from **Fees & finance › Procurement › Purchase requests**.

Before you start

- Every member of staff can write a purchase request.
- The head teacher, the deputy and the school administrator approve or reject requests. Nobody approves their own.
- To file the request under a budget line, the school's budget accounts must be set up. The account is optional, but without it the approver sees no budget.

Ask for something



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1 Say in a few words what is needed.

2 The budget line the spending will be filed under. The approver sees its budget.

3 When it is needed, and below it the priority.

4 The items: unit, quantity and your best estimate of the price.

5 Send it to an approver. Save as draft keeps it for later.

1. Press **New request**.
2. Under **What is needed** 1, type a few words: *Kitchen supplies for Term 3*.
3. Choose the **Account (budget line)** 2 the spending belongs to.
4. Choose **Needed by** 3 (or press *In a week*, *In two weeks*, *In a month*) and the **Priority**: *Normal* or *Urgent*.
5. Under **Why it is needed**, say what it is for.
6. List the items 4: what is needed, the unit (*pcs, kg...*), the quantity and the estimated price. Press **Add an item** for more lines. If the store keeps the item, choose it in the list under the line (*Store: ...*): its name and unit fill in, and the goods go into Stores when they arrive.
7. Press **Send for approval** 5, or **Save as draft** to finish later.

The request gets its number, for example *REQ-2026-0014*, and opens so you can check it. The price is only your best estimate; the suppliers' quotes decide the real one.

> **TIP**
> You can also pick items from the Supplier catalogue into a basket and turn it into a draft request at the listed prices.

Following your request

The list has chips: **My requests**, and for those who see procurement, **Waiting for approval**, **Approved, to buy** and **All**. Search by number or by what is needed. Click a request to open it.

Status	Means
Draft	Saved, not sent. You can change it.
Waiting for approval	Sent; an approver decides.
Approved	Procurement can buy it.
Rejected	Sent back with a note. You can change it and send it again.
Ordered	A purchase order made from it has been approved.
Cancelled	Stopped, with the reason. Kept, never deleted.

An open request shows the estimate, the status, who decided, the items, any purchase orders made from it, and its **History**. **Print** gives the purchase requisition as a PDF.

Approving or rejecting

When requests wait, approvers land on **Waiting for approval**. Open one.

A box shows the budget line's money this term: the budget, what is spent, what is **committed in orders** (approved orders on that account not yet invoiced), what is left, and what would be left **After this request**. When that goes below nothing it turns red and says *over budget*. You may still approve it.

- Press **Approve** to let procurement buy it.
- To reject, type the reason in **Note** first, then press **Reject**. The note is required: the person needs to know what to correct.

The buttons do not show on a request you wrote yourself.

Changing or cancelling a request

- **Change** works on a draft or a rejected request, for the person who asked (and for procurement). A rejected request you change becomes a draft again: send it again when it is ready.

- **Cancel request** stops a request that is not yet ordered, for the person who asked and for procurement. Type the reason in **Note** first; it is required and kept.

What happens next

An approved request waits for procurement under **Approved, to buy**, and appears as *Approved requests waiting to be bought* on the Quotations, Auctions and Purchase orders pages. On the request, procurement chooses one of three ways to buy:

- **Ask suppliers for quotes**: see Quotations.
- **Put out to auction**: see Auctions.
- **Order directly**: see Purchase orders.

When an order made from the request is approved, the request becomes **Ordered**. If that order is later cancelled, and no other order stands on it, the request goes back to **Approved**.

QUESTIONS

Can I approve my own request?
No. Nobody approves their own request, even the head teacher. Ask another approver: the head teacher, the deputy or the school administrator.

My request was rejected. What now?
Open it and read the **Note**. Press **Change**, correct what was asked, and press **Send for approval** again.

Who can see my request?
You, and the staff who see procurement: the head teacher, the deputy, the school administrator, the bursar, the finance officer, the purchaser and the store keeper. Other members of staff see only their own requests.

Can a request go over the budget?
Yes. The approver sees what the request would leave on the budget line, and the words *over budget* when it goes below nothing. Approving it anyway is their decision.

Ask suppliers for quotes and choose the best

Send a request for quotation to several suppliers, take their quotes (on the portal or on paper), compare them side by side after the closing time, and award one.

For: Bursar, Store keeper, School administrator · app.schooldynamics.ug/help/procurement/quotations

A request for quotation asks several suppliers to price the same list before a closing time. Their quotes stay sealed until then. After closing, the page sets them side by side, and the one you award becomes a draft purchase order.

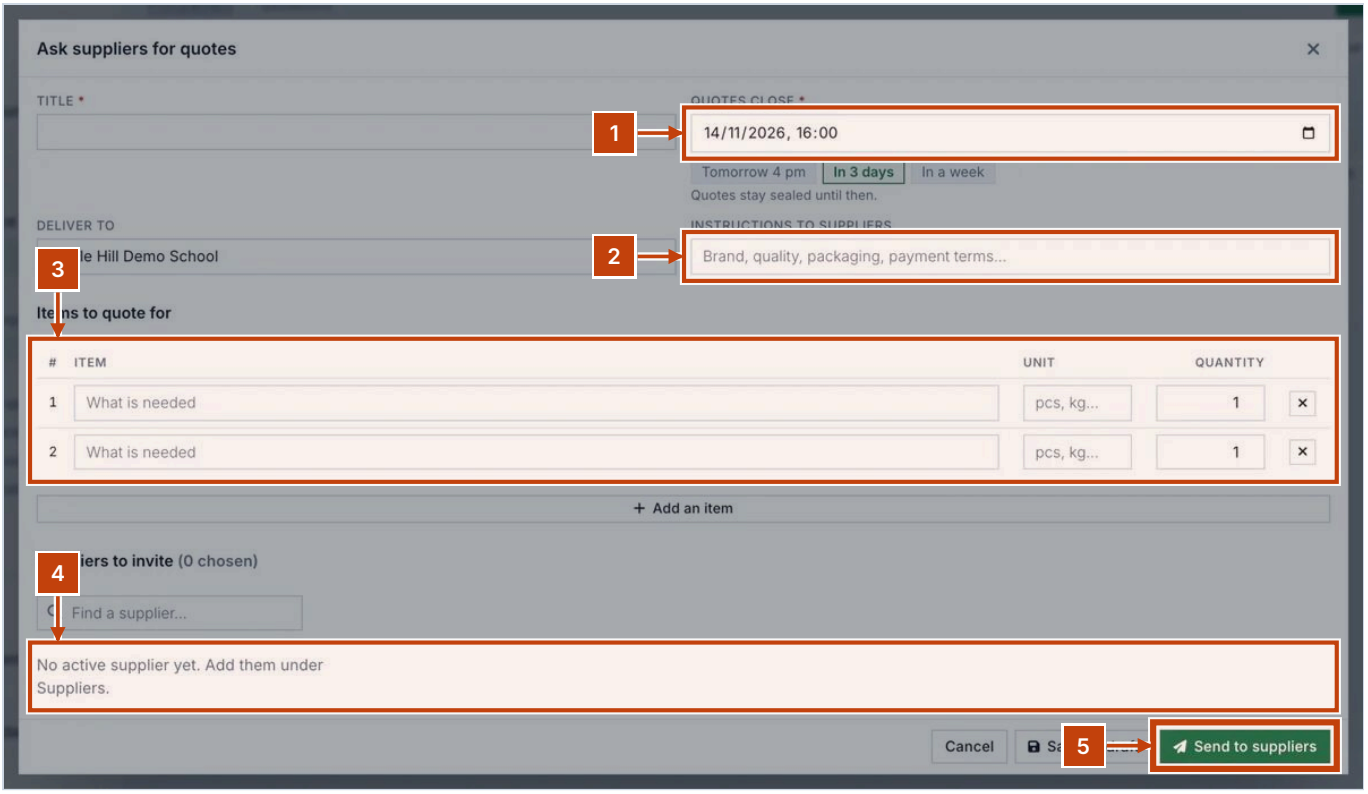
Open it from **Fees & finance › Procurement › Quotations**.

Before you start

- The bursar, the finance officer, the purchaser and the school administrator ask for quotes and award them. The head teacher, the deputy and the store keeper can look.
- The suppliers must be on the Suppliers list and active. A suspended or blacklisted supplier cannot be invited.
- Suppliers with portal access quote themselves on the supplier portal. For the others, print the request and type in their paper quotes.

Ask suppliers to quote

Start from an approved purchase request (its **Ask suppliers for quotes** button, or its number under *Approved requests waiting to be bought*): its title, purpose and items are copied in. Or press **Ask for quotes** to write one from nothing.



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1. When quotes close. They stay sealed until then.
2. What suppliers must know: brand, quality, packaging, payment terms.
3. The items and quantities, without prices.
4. Tick the suppliers to invite.
5. Open it to the invited suppliers.

1. Check the **Title**.
2. Set **Quotes close** 1: at least half an hour from now. *Tomorrow 4 pm*, *In 3 days* and *In a week* fill it for you.
3. Check **Deliver to** (the school's name is filled in) and write the **Instructions to suppliers** 2.
4. List the items to quote for 3: what, unit and quantity. No prices here.
5. Tick the suppliers to invite 4. **Find a supplier** narrows the list.
6. Press **Send to suppliers** 5, or **Save as draft**.

The request opens on its own page with its number (*RFQ-2026-0003*). Invited suppliers see it on their portal. **Print RFQ** gives a PDF for a supplier who does not use the portal.

While quotes come in

Suppliers invited shows each supplier's answer: *Quoted* (with *on paper* when you typed it in), *Declined* with their reason, *Looked*, or *Not yet*. The items card says *Sealed until ...* and how many quotes are in.

- **Type in a paper quote** records a quote that came on paper: choose the supplier, their quote number, the delivery days, the date it is valid until, and a unit price for each item (leave blank what they do not offer). Press **Record the quote**.
- **Close and compare** stops taking quotes now, before the closing time, and opens the sealed quotes.

Compare and award

After the closing time, or after **Close and compare**, the card becomes **Quotes compared**: one column per supplier, with each item's unit price and amount, and the delivery days and validity under the supplier's name.

- The cheapest price for each item is highlighted.
- The total row says *all items* or *some items missing*. The cheapest quote that prices every item is marked *cheapest*, and its **Award** button is the main one.

To award:

1. If you choose a quote that is not the cheapest complete one, type why in **Note (why a quote is chosen, or why cancelled)**.
2. Press **Award** under the chosen quote and confirm.

The other quotes become *Not chosen*, and a draft purchase order is made from the winning prices (only the items that supplier priced). The order opens: check it, then it goes for approval as usual. The suppliers are told on their portal: the winner that the order follows, the others that another quote was chosen.

Comparison sheet prints every quote side by side, with the reason for the choice.

> ⚠ CAREFUL
> An award cannot be undone on this page. If the order is wrong, cancel it on the order's page, with the reason.

Cancelling

Type the reason in the **Note** box and press **Cancel**. Every invited supplier is told why. A request already awarded cannot be cancelled.

If nobody quoted, the page says *No supplier quoted*: cancel it, or write another and invite other suppliers.

Statuses

Status	Means
Draft	Saved, not sent. Press **Send to suppliers** on its page.
Open for quotes	Suppliers can quote until the closing time.
Closed	Closed early; quotes can be compared.
Awarded	A quote was chosen and its order drafted.
Cancelled	Stopped, with the reason.

QUESTIONS

Can I see the prices before the closing time?
No. Until the closing time you see who has quoted, never the prices. To compare earlier, press **Close and compare**: no more quotes are taken after that.

A supplier brought a quote on paper. How do I enter it?
While the request is open, press **Type in a paper quote**, choose the supplier, type their prices and press **Record the quote**. Only invited suppliers can be chosen.

Must I award the cheapest quote?
No, but choosing another needs a reason. Type it in the **Note** box before pressing **Award**. It is kept and printed on the comparison sheet.

Can I change a request for quotation after saving it as a draft?
Not on this page. A draft can be sent or cancelled. If something is wrong, or its closing time has passed before you sent it, cancel it and write another.

Run a reverse auction

Invite suppliers to bid their prices down, live, until an end time. Set the rules, follow the bids, enter a phone bid, and award the winner.

For: Bursar, School administrator · app.schooldynamics.ug/help/procurement/auctions

In a reverse auction the suppliers you invite bid their prices down, live, until the end time. The lowest bid usually wins and becomes a draft purchase order. Use it for a large order where several suppliers sell the same thing: food for the term, fuel, stationery.

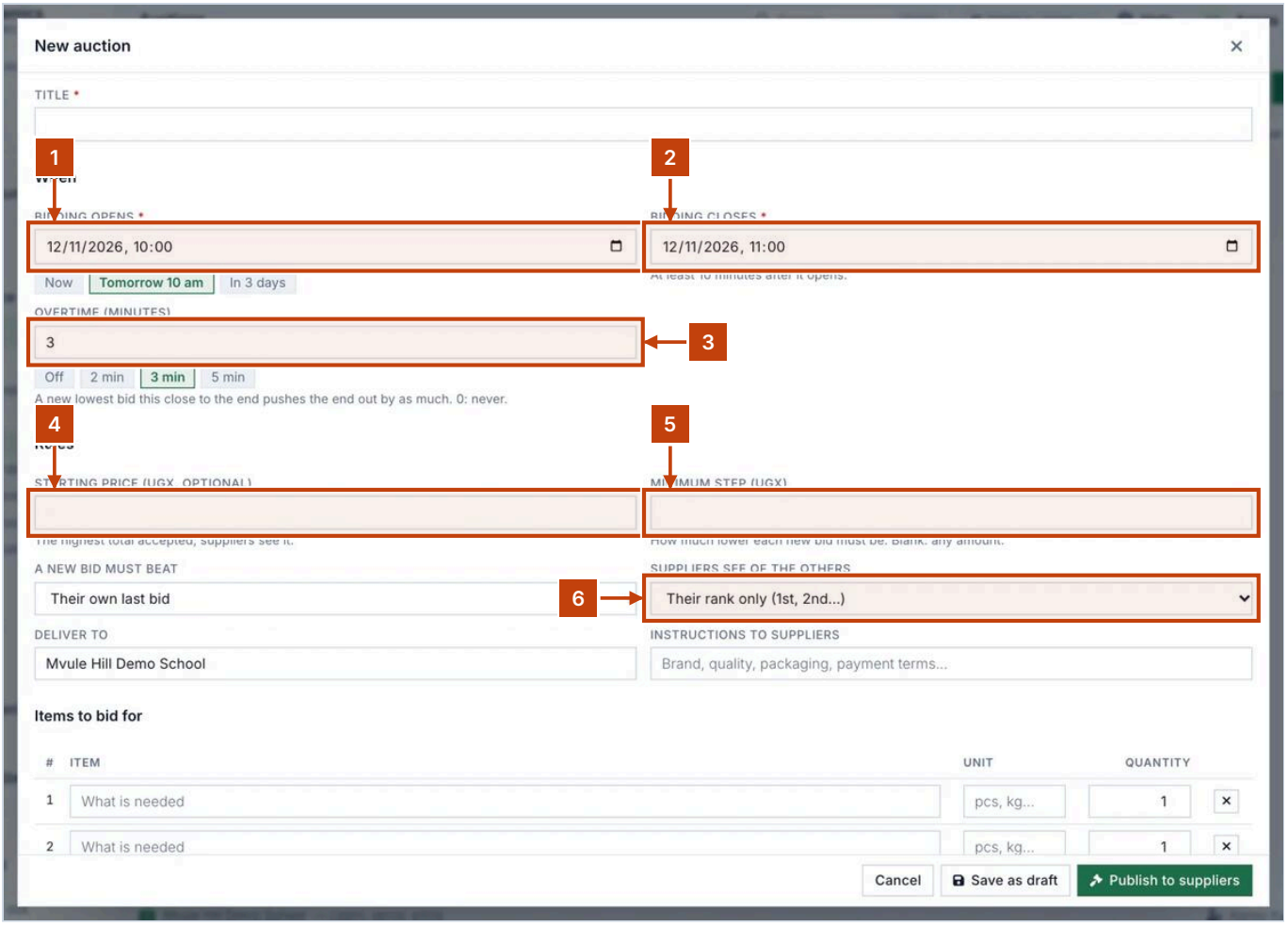
Open it from **Fees & finance › Procurement › Auctions**.

Before you start

- The bursar, the finance officer, the purchaser and the school administrator run auctions. The head teacher, the deputy and the store keeper can look.
- Invite at least two active suppliers. They bid on the supplier portal, so they need portal access (see Suppliers). A bid made by phone can be entered for them.

Set up an auction

Start from an approved purchase request (its **Put out to auction** button, or its number under *Approved requests waiting to be bought*): its items are copied and its estimate becomes the starting price. Or press **New auction**. A basket from the Supplier catalogue can also become a draft auction.



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1 When bidding opens.

2 When it closes: at least 10 minutes later, at most 30 days.

3 Overtime: a new lowest bid this close to the end pushes the end out.

4 Starting price: the highest total accepted. Optional.

5 How much lower each new bid must be.

6 What suppliers see of the others' bids.

1. Type the **Title**.
2. Set **Bidding opens** 1 (*Now*, *Tomorrow 10 am* or *In 3 days*) and **Bidding closes** 2.
3. Set the **Overtime (minutes)** 3: 0 to 30. 0 means the end never moves.
4. Set the **Starting price (UGX, optional)** 4. Suppliers see it; no total above it is accepted.
5. Set the **Minimum step (UGX)** 5. Blank means any amount lower.
6. Choose what **A new bid must beat**: *Their own last bid* or *The lowest bid so far*.
7. Choose what **Suppliers see of the others** 6: *Their rank only*, *Their rank and the lowest bid, without names*, or *Nothing of the others: a sealed-bid auction*.
8. Check **Deliver to** and write the **Instructions to suppliers**.
9. List the items to bid for: what, unit and quantity (40 at most).
10. Tick the suppliers to invite. *Selling ...* shows only suppliers whose catalogue products are in that category; **Invite these ...** ticks every supplier shown.
11. Press **Publish to suppliers**, or **Save as draft**.

The lowest bid so far only works when suppliers can see it, so choosing it sets *Their rank and the lowest bid*.

A draft opens on its own page with **Change** and **Publish**. Once published, the invited suppliers are told and it can no longer be changed.

Following it live

The auction's page refreshes itself every few seconds while it runs.

- The clock shows **Time left** (or **Until bidding opens**), and how many times the end was extended.
- **Lowest bid**, **Suppliers bidding**, and how far the lowest bid is below the starting price (or the estimate).
- **Standings**: every supplier's standing bid, lowest first, with names. Equal totals: the earlier bid ranks first.
- **Lowest bid over time**, from the second bid.
- **Prices by item**, for the six lowest bids.
- **Suppliers invited**, with each answer: *Bidding*, *Declined*, *Agreed to the rules*, *Looked* or *Not yet*.
- **Every bid**, newest first: *Standing*, *Replaced* or *Voided*.

What you can do while it runs:

- **Enter a phone bid** (while live): choose the supplier, type a unit price for every item, and say in **How the bid came** when and how it came. It follows the same rules as a bid on the portal.

- **More time**: 5 minutes to a week more, with the reason. Every invited supplier is told the new end and why.
- **Void a bid** (the eraser beside it in **Standings**): for a bid made in error, never to favour anyone. The supplier's bid before it stands again, and they are told why.
- **Cancel the auction** (in the ⋮ menu): every invited supplier is told why.

How bidding works

- A bid prices every item. Its **total** is what ranks.
- A supplier's new bid replaces their last and must be lower by at least the minimum step. With *The lowest bid so far*, a supplier who is not leading must also go below the lowest bid by the step.
- No total above the starting price is accepted.
- A bid binds: a supplier cannot take it back.
- A bid more than 30% below the supplier's last bid (or the lowest bid, or the starting price) asks to be confirmed, in case of a missing zero.
- With overtime set, a new lowest bid in the last minutes moves the end to that many minutes after it.
- A supplier who loses the lead is told on the portal, except in a sealed auction.

Award the winner

When bidding closes, the auction says **Ended, to award**.

1. Press **Award** beside the chosen bid. The lowest one's button is the main one.
2. If it is not the lowest bid, type why in **Note (needed when not the lowest)**.
3. Press **Award and draft the order**.

A draft purchase order is made at the bid's prices, with *Won in auction AUC-…* in its terms, and opens for you to check and send for approval. The winner is told the order follows once the school approves it; the others are thanked.

To end it without a winner, choose **Close without an award** in the ⋮ menu and give the reason.

Auction record prints the bids, the standings and the history.

Statuses

The list's buttons filter by them: **Live**, **Starts soon**, **To award**, **Drafts**, **Awarded**, **Cancelled**.

Status	Means
Draft	Not published; suppliers know nothing of it.
Starts soon	Published; bidding has not opened.
Live	Suppliers are bidding.
Ended, to award	Bidding closed; choose the winner.
Awarded	A bid won; its order is drafted.
Cancelled	Stopped, with the reason.

QUESTIONS

How many suppliers must I invite?
At least two. An auction needs someone to bid against.

A supplier says they typed a wrong price. Can it be taken back?
A supplier cannot take a bid back. Procurement can void a bid made in error: press the eraser beside it in **Standings** and give the reason. The supplier's bid before it stands again, and they are told why.

Why did the end time move?
Overtime. A new lowest bid in the last minutes pushes the end out, so nobody wins by bidding at the last second. **More time** also moves it, with a reason every supplier sees.

Must I award the lowest bid?
No, but choosing another needs a reason, which is kept and printed on the auction record.

Write, approve and send a purchase order

Make a local purchase order (LPO) from an award or directly, have it approved by someone who did not write it, send it to the supplier, and follow it to closing.

For: Bursar, Head teacher, School administrator · app.schooldynamics.ug/help/procurement/purchase-orders

A purchase order (LPO) is the school's written order to one supplier: the items, the prices, the delivery date and the budget account it is paid from. It is approved by a leader who did not write it, sent to the supplier, received at the store, invoiced and paid.

Open it from **Fees & finance › Procurement › Purchase orders**.

Before you start

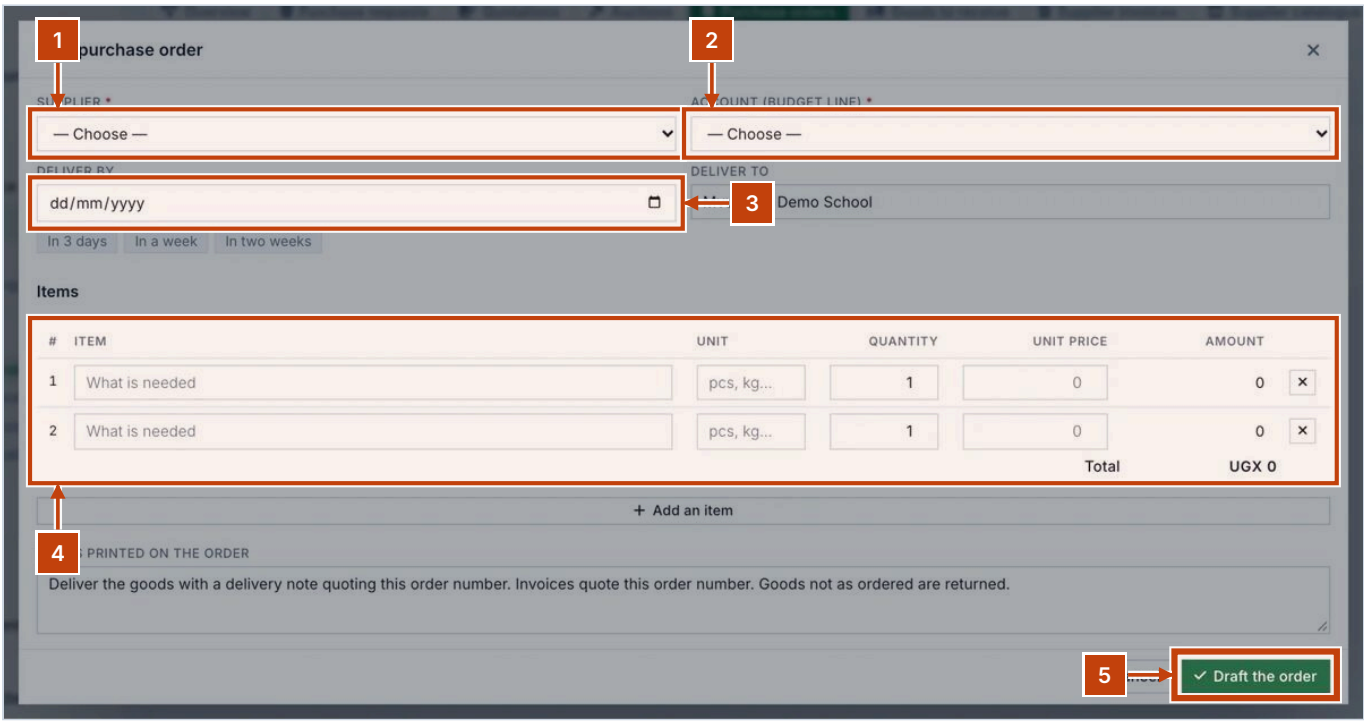
- The bursar, the finance officer, the purchaser and the school administrator write and send orders.
- The head teacher, the deputy and the school administrator approve them, never one they wrote.
- The supplier must be active (see Suppliers).

Three ways an order is made

- **From quotes.** Awarding a quotation drafts the order at the winning prices. See Quotations.
- **From an auction.** Awarding the winning bid drafts the order at the bid's prices. See Auctions.
- **Directly.** Press **Order directly** on an approved purchase request (or its number under *Approved requests waiting to be bought*), or **New order** for an order of its own.

> ⚠ **CAREFUL**
>
> An order awarded from quotes or an auction that did not start from a purchase request is filed under the school's first budget account. Open the draft, press **Change** and choose the right **Account (budget line)** before it is approved.

Write an order directly



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1. The supplier. Only active suppliers are listed.
2. The budget account the spending is filed under.
3. When the goods must arrive.
4. Items, quantities and the agreed unit prices.
5. Save it as a draft, for approval.

1. Press **New order** (or **Order directly** on an approved request: its account, date and items are copied, with the estimated prices).
2. Choose the **Supplier** 1.
3. Choose the **Account (budget line)** 2. It is required.
4. Set **Deliver by** 3 and check **Deliver to**.
5. List the items 4 with the unit prices agreed with the supplier. Choose the store item under a line when the store keeps it.
6. Check the **Terms printed on the order**. The usual terms are filled in: deliver with a delivery note quoting the order number, invoices quote the order number, goods not as ordered are returned.
7. Press **Draft the order** 5.

The order gets its number (*LPO-2026-0008*) and opens. It is a **Draft** until approved.

Approve and send

1. The approver opens the order and presses **Approve**, then confirms the amount.
2. Procurement presses **Send to supplier**.

After approval the purchase request it came from becomes *Ordered*. Once sent, the supplier sees the order on their portal and is asked to accept it. **Print LPO** gives the order as a PDF, for a supplier who does not use the portal.

Reading an order

The top shows four figures: **Ordered**, **Received**, **Invoiced** and **Paid**. Below them:

- **Items**: ordered, unit price, amount, received, and what is **Still due**. Store items are marked *store item*.
- **Deliveries**: each goods received note (with **GRN** to print it), and deliveries the supplier announced (*On its way*).
- **Invoices**: each invoice with its status. **Supplier invoices** opens the finance page.
- **History**: who did what, from the school and from the supplier.

If the supplier asked a question about the order, it shows at the top: **From the supplier:** and their words.

The list

The list shows **Waiting for approval**, **Approved, to send** and **With suppliers** (with the value ordered). Filter by status and by supplier, or search by order number or supplier. A delivery date that has passed on an order still waiting for goods shows in red.

Status	Means
Draft	Written, waiting for approval. Can be changed.
Approved	Approved; procurement sends it.
Sent to supplier	Waiting for the supplier to accept it.
Accepted by supplier	The supplier will deliver.
Partly received	Some goods counted in.
Received	Everything counted in.
Closed	Received, invoiced and paid in full.
Cancelled	Stopped, with the reason.

Change or cancel

- **Change** works only on a draft.
- To cancel, type the reason in **Reason (to cancel the order)** and press **Cancel order**. This works until goods have been received on it. A supplier who already had the order is told why, any delivery they announced is cancelled, and the purchase request goes back to *Approved* if no other order stands on it.

What happens next

The store receives the goods on this order: see Receive goods. Then the supplier invoices it, and finance checks and pays: see Supplier invoices.

QUESTIONS

I wrote the order. Why can I not approve it?
Nobody approves an order they wrote. The page says *You wrote this order, so another approver approves it*. Ask the head teacher, the deputy or the school administrator.

Can I change an order after it is approved?
No. Items and prices are fixed once approved. If it must change, cancel it with the reason (while no goods have been received) and write a new one.

The supplier does not use the portal. How do they get the order?
Send it as usual, then press **Print LPO** and give them the paper.

When is an order closed?
By itself, once everything is received, invoiced in full and every invoice is paid.

Receive goods and write the goods received note

See what suppliers are delivering, count what arrives against the order, accept or reject each item, and write the goods received note (GRN).

For: Store keeper, Bursar · app.schooldynamics.ug/help/procurement/receiving-goods

When a supplier delivers, the store counts what arrived against the purchase order and writes a goods received note. Only what was accepted can be invoiced, so this count is what the school pays for.

Open it from **Fees & finance › Procurement › Goods to receive**.

Before you start

- The store keeper, the purchaser, the bursar and the school administrator receive goods.
- The order must have been sent to the supplier (its status is *Sent to supplier*, *Accepted by supplier* or *Partly received*). An order that is only approved cannot be received.

See what is coming

Goods to receive has two lists:

- **Announced by suppliers**: deliveries a supplier said are on their way, on the supplier portal, with the order, the expected day, their delivery note number and how many items are coming. Press **Receive** to open the order.
- **Orders waiting for goods**: every order still waiting, the earliest delivery date first. A date that has passed is red and says *late*. **Still due** says how many of the order's items are not yet in. Press **Open** to open the order.

Count what arrived

1. Open the order.
2. Press **Receive goods**. For a delivery the supplier announced, press **Receive it** beside it under **Deliveries** instead: the quantities they said they sent are filled in.
3. Type the **Supplier's delivery note number**.
4. For each item, type the quantity **Accepted**. If some are damaged, wrong or short-dated, type them under **Rejected** and say **Why rejected**.
5. Leave **Put accepted store items into Stores** ticked, unless the goods are not going into the store.
6. Add **Notes** if needed.
7. Press **Write the goods received note**.

The note gets its number, for example *GRN-2026-0005*.

The note is refused when:

- an item's accepted quantity is more than is still due (*Only 20 of "Maize flour" is still due on this order*);
- something is rejected with no reason;
- nothing at all is typed.

> **TIP**
> Count before the delivery van leaves. The supplier sees what you accepted and rejected, with your reasons, on their portal.

What happens next

- The order becomes **Partly received**, or **Received** when nothing is still due. Rejected goods are not counted in: they stay due.
- Each accepted line that names a store item goes into Stores as a new batch, at the order's unit price, with the GRN and order numbers in its description.
- The supplier sees the goods received note on their portal. **GRN** beside the delivery prints it.
- The supplier can now invoice up to the value received. Finance checks the invoice against it: see Supplier invoices.

QUESTIONS

More arrived than the order says. Can I accept it?
No. You can accept only what is still due on the order. Reject the extra, or ask procurement for another order.

Some items were damaged. What do I do?

Type the good ones under **Accepted** and the damaged ones under **Rejected**, with the reason. Rejected goods stay due on the order, and the supplier sees why.

Do received goods go into Stores by themselves?

Yes, for lines that name a store item, when **Put accepted store items into Stores** is ticked. They come in at the order's unit price.

Check, approve and pay supplier invoices

Enter a paper invoice, check every invoice against what was ordered and received, approve it so it is owed, and pay it with a payment voucher.

For: Bursar, School administrator · app.schooldynamics.ug/help/procurement/supplier-invoices

A supplier invoice is the supplier's bill for goods the school has received on a purchase order. Finance checks it, approves it (the school now owes it), then pays it in full or in parts. Each payment writes a payment voucher.

Open it from **Fees & finance › Procurement › Supplier invoices**.

Before you start

- The bursar, the finance officer and the school administrator enter, approve, reject and pay invoices. The head teacher and the deputy can look.
- An order is invoiced only after goods on it have been received: see Receive goods.

Where invoices come from

Most suppliers send theirs on the supplier portal, from the order. For a paper invoice:

1. Open the order and press **Enter an invoice**.
2. Type **Their invoice number** and the **Amount (UGX)**. The amount starts at what was received and not yet invoiced.
3. Set the **Invoice date** (not in the future) and **Due for payment** (or press *14 days* or *30 days*).
4. Attach a **Copy of the invoice (PDF or photo)**.
5. Press **Record the invoice**.

The invoice gets a number of the school's own (*INV-2026-0004*) and waits under **To check**. It is refused when its amount is more than was received and not yet invoiced, when the due date is before the invoice date, or when that supplier's invoice number was already recorded.

Check and approve

The page shows **Waiting for checks**, **Approved, still to pay** and **Paid in full**. The chips **To check**, **To pay**, **Paid** and **Rejected** choose the list; search by invoice number or supplier.

1. Under **To check**, press **Check** beside the invoice.
2. Read **The three-way check**: what was ordered, what was received (goods received notes), what is already invoiced on other invoices, what **Can still be invoiced**, and **This invoice**. A green line says it is within what was ordered and received; a red one says it is not.
3. Open the invoice copy if one is attached.
4. Press **Approve for payment** and confirm. Or type a **Reason (to reject)** and press **Reject**.

This three-way check is why an invoice for goods that never came cannot be approved: **Approve for payment** is greyed out when the invoice is more than the goods received and not yet invoiced.

> GOOD TO KNOW
>
> Approving records the invoice as spending bought on credit, on the order's budget account and term, with the invoice's due date. From then on it shows under Budget & expenditure and Creditors, and in the committee reports. A rejected invoice records nothing; the supplier sees your reason.

Pay an invoice

1. Under **To pay** (the soonest due first), press **Pay**.
2. Check the **Amount (UGX)**: it starts at what is still owed. Lower it to pay part.
3. Set **Paid on** (not in the future).
4. Choose **Paid by**: *Bank Transfer*, *Cheque*, *Mobile Money* or *Cash*.
5. Type the **Cheque number** or **Transaction reference** (not needed for cash).
6. Press **Pay and write the voucher**.

The payment voucher (*PV-2026-0007*) opens in a new tab to print. The supplier sees the payment on their portal. The amount can never be more than is still owed on the invoice.

> CAREFUL
>
> Pay supplier invoices here, not under Creditors. Creditors refuses a payment on a supplier invoice and sends you back to this page, so that the voucher, the invoice and its order stay together.

Statuses

Status	Means
Waiting for checks	Received from the supplier or typed in; finance checks it.
Approved, not paid	Owed to the supplier.
Partly paid	Some paid; the rest is still owed.
Paid	Paid in full.
Rejected	Not accepted; the supplier was told why.

A due date that has passed on an unpaid invoice shows in red, and the Procurement overview counts it under *Invoices overdue for payment*.

What happens next

When an order has been received in full, invoiced for all of it and every invoice is paid, the order closes by itself. Each supplier's statement (invoices approved, payments and the running balance) prints from Suppliers.

QUESTIONS

Why is Approve for payment greyed out?
The invoice is for more than was received and not yet invoiced. Reject it with the reason, or receive the rest of the goods first.

Can I pay part of an invoice?
Yes. Type the amount paid now. The invoice becomes *Partly paid*, and **Pay** stays on it until it is paid in full.

Can I pay a supplier invoice from Creditors?
No. Creditors refuses and sends you here, so the payment voucher, the invoice and its order all follow.

The same invoice came twice. What happens?
The second one is refused: the same invoice number from the same supplier can be recorded only once.

Shop the supplier catalogue

Browse what the school's suppliers sell, compare prices and quantity prices, and turn a basket into a purchase request or a draft auction.

For: Everyone, Store keeper, Bursar · app.schooldynamics.ug/help/procurement/supplier-catalogue

The supplier catalogue is what the school's suppliers sell, posted by them on the supplier portal with prices and pictures. Anyone on the staff can browse it, compare prices, and pick items into a basket that becomes a purchase request.

Open it from **Fees & finance › Procurement › Supplier catalogue**.

Before you start

- Every member of staff who may ask for purchases can browse it and fill a basket.
- The bursar, the finance officer, the purchaser and the school administrator can also take a product off the catalogue, and turn a basket into an auction.
- The catalogue fills only when suppliers post their products on the portal.

Browse and compare

The top shows **Products**, **Suppliers selling**, **New this month** and **Prices changed this month**.

- Search by product, code or supplier, and narrow by category or supplier.
- Sort by **Name**, **Lowest price**, **Highest price** or **Newest**.
- **Price for**: type a quantity (say 50) and every card shows the price for that quantity, with the supplier's quantity price and the saving.
- **In stock** hides what is out of stock. **Clear** removes every filter.

Each card shows the picture, the supplier, the price per unit, *down to … from …* when the supplier gives a lower price for bigger orders, whether it is in stock, the delivery days, and the smallest order.

Look at a product

Click a product to open it:

- its pictures and price, and a table of quantity prices (**Quantity**, **Each**, **Saving**);
- the supplier, with phone, email and TIN, and links to their other products;
- the smallest order, the delivery time and the supplier's code;
- the description, and the **Price history** with each change in per cent.

Type **How many** to see the total, then press **Add to the basket** (or **Update the basket**).

Turn the basket into a request

1. Press **Basket**. It shows each product at the price for the quantity you chose, the next quantity price (*50 or more: 58,000 each*), what quantity prices saved, and the **Total, at the listed prices**.
2. Change a quantity, or remove a product, if needed.
3. Type **What the request is for**: *Kitchen supplies for Term 3*.
4. Press **Make a purchase request**.

A draft purchase request opens, with each product as a line (the product and supplier's name) at the listed price, and a note saying where the prices came from. Check it, press **Change** to choose the budget account, then **Send for approval**. See Ask for something to be bought.

The basket stays with you while you move around the app. **Empty** clears it. A product with a smallest order cannot be asked for in a lower quantity.

Put a basket out to auction

Procurement sees **Put out to auction** in the basket. It makes a draft reverse auction of the basket's products, inviting their suppliers and every other active supplier selling in the same categories. It is set to open tomorrow at 10:00 for an hour, with the basket's total as the starting price and 3 minutes' overtime. Check the times and rules, then publish it: see Run a reverse auction.

Take a product off the catalogue

Procurement can remove a product the school does not want offered:

1. Open the product and press **Take off the catalogue**.
2. Say **Why** (*Price too high*, *Poor quality before*...).
3. Press **Take it off**.

The supplier sees that it was taken off and why. It is listed under **Taken off the catalogue**, where **Put back** returns it.

QUESTIONS

Does picking from the catalogue buy anything?
No. The basket becomes a draft purchase request. You send it for approval, and procurement still orders it.

Why is the catalogue empty?
Suppliers post their own products on the supplier portal (My products). Give a supplier a portal password from Suppliers and ask them to add what they sell.

A product disappeared from the catalogue. Why?
The supplier hid or removed it, procurement took it off, or the supplier was suspended or blacklisted. Their products leave the catalogue, and any basket.

Keep the list of suppliers

Add the businesses the school buys from, open the supplier portal to them, keep their tax and bank details, and suspend or blacklist one.

For: Bursar, School administrator, Store keeper · app.schooldynamics.ug/help/procurement/suppliers

A supplier is a business or person the school buys from. The list keeps their contacts, what was spent with them and what is still owed. Suppliers are chosen when recording spending, a store delivery, a quotation or an order.

Open it from **Fees & finance › Procurement › Suppliers**.

Before you start

- The bursar, the finance officer, the purchaser and the school administrator add and change suppliers.
- The head teacher, the deputy and the store keeper can look.

The list

The top shows the number of **Suppliers**, what was **Spent with them** (all terms) and what is **Still owed to them** (it opens Creditors). Search by name, phone or email; sort by name, spending or what is owed.

Under a supplier's name you may see *Portal on*, *Suspended* or *Blacklisted*, *New bank details*, and how many products they have on the catalogue.

Click a name (or the eye) for a quick view: spent and still owed, their phone and email, open credits with due dates, and the latest spending. The row's ⋮ menu has **Portal access & details**, **Statement (PDF)**, their **Purchase orders**, **Their products**, **Expenditure with them**, **Credits**, the old **Products** and **Orders** lists, and **Delete supplier**.

Add a supplier

1. Press **New supplier**.
2. Type the **Name of the business or person** and the **Phone number**. A second phone, the **Email** and the **Address or location** are optional.
3. To let them use the portal now, tick **Let them sign in to the supplier portal**. Type a password of 8 characters at least, or press **Make one**. Leave **Ask them to choose their own password when they first sign in** ticked.
4. Press **Add supplier**.

With a password, the dialog then shows where they sign in, their **Username** and the **Password**. Pass these on now: the password is not shown again. They can also sign in with their phone number or email. Press **Done**.

Portal access and details

Choose **Portal access & details** from the row's menu.

- **Supplier portal**: whether the portal is on, the names they sign in with, and when they last signed in. Type or make a **New password** and press **Create password and open the portal** (or **Reset password**). **Switch the portal off** stops them signing in; **Switch the portal back on** lets them in again with the same password.
- **Business details**: the registered name, contact person, TIN, registration number, and **What they supply** (the categories).
- **Payment details**: bank, branch, name on the account, account number, mobile money number.
- **Standing with the school**: the **Status**, with **Why** for anything but *Active*.

Press **Save the details**.

Status	The supplier
Active	Can do business with the school.
Suspended	Can sign in, but is not invited, gets no new orders, and cannot quote, bid or invoice. Their products leave the catalogue.
Blacklisted	Cannot sign in, and cannot be given a password. Their products leave the catalogue.

New bank details from a supplier

A supplier can send new payment details on the portal. They wait for finance. The list then says how many suppliers sent new details, and the supplier's **Portal access & details** shows them.

> ⚠ CAREFUL
>
> Changed bank details are how invoice fraud is done. Before you press **Confirm**, call the supplier on a number you already know, not one given in the request. Press **Refuse** if you are not sure; the supplier is asked to call the school.

Statement and deleting

- **Statement (PDF)** lists the supplier's approved invoices and the payments made, with the running balance.
- **Delete supplier** works only for a supplier nothing points at. Otherwise the message says what they still have (spending, credits, orders, invoices and so on).

QUESTIONS

A supplier forgot their portal password. What do I do?
Open **Portal access & details** from the supplier's row menu, type or make a new password, and press **Reset password**. Pass it on; it is shown only once.

What is the difference between suspended and blacklisted?
A suspended supplier can still sign in, but is not invited and cannot quote, bid or invoice. A blacklisted supplier cannot sign in at all. Either way, their products leave the catalogue.

Why can I not delete a supplier?
A supplier with any spending, credits, orders, invoices, payments, deliveries, stock, quotations, auctions or products stays. The message counts what points at them.

The supplier portal

What a supplier sees and does on the portal at /supplier. Signing in, quoting, bidding, accepting orders, announcing deliveries, invoicing, payments and products.

For: Supplier, Bursar · app.schooldynamics.ug/help/procurement/supplier-portal

The supplier portal is where the school's suppliers do business with it: quote, bid, accept orders, say when goods are coming, send invoices and see payments. It looks like the school's own pages, light or dark. A supplier sees only their own business with the school.

This lesson is for suppliers, and for the school staff who help them.

Signing in

1. Open the address the school gave you. It ends in **/supplier**.
2. Type your **Username, email or phone**.
3. Type the **Password** the school gave you.
4. Press **Sign in**.
5. The first time, **My account** asks you to choose your own password: type the one you were given under **Current password**, then your new one twice (8 characters at least), and press **Change password**.

After five wrong tries in a minute, the page asks you to wait before trying again. The school's bursar or procurement office gives the password, and resets it when it is forgotten: see Suppliers.

Home

The home page shows **Requests to quote for**, **Auctions live or coming**, **Orders to accept**, **Orders to deliver** and what is **Owed to you (approved invoices)**. **Waiting for you** lists what needs you, auctions first. **From the school** lists the school's news to you: invitations, awards, orders, goods received, invoices approved or rejected, payments. Unread news is in bold; **Mark … as read** clears it.

The menu has **Quotations**, **Auctions**, **Purchase orders**, **Invoices & payments**, **My products** and **My account**.

Quoting

1. Open **Quotations** and click a request.
2. Type **Your unit price (UGX)** for each item. Leave blank what you do not offer.
3. Fill **Delivery within (days)**, **Prices valid until** and **Your quotation number**. Attach a copy if you like.
4. Press **Send my quote** (or **Save as draft** to finish later).

You can change a sent quote (**Send the changes**) or **Withdraw it** until the closing time. Not quoting? Press **Tell the school I will not quote**. Quotes are opened together after closing, and you see only your own. You are told whether yours was chosen. **Print the request** gives it on paper.

Bidding in an auction

1. Open **Auctions** and click the auction. Read the items and **The rules**.
2. Press **I agree to these rules**. You do this once; you can agree before bidding opens.
3. When it is live, type a unit price for every item. The total is what ranks.
4. Press **Place my bid**.

The page counts down and refreshes itself. It shows **Your bid**, and, as the school chose, **Your place** and the **Lowest bid**, and the **Starting price** when there is one. Under the total it says how low your next bid must be (*Bid UGX 4,350,000 or less now*). To bid again, lower your prices; the buttons **−0.5%**, **−1%** and **−2%** take that much off every price.

- A bid far below your last asks you to confirm: **Yes, place this bid**, or **Change the prices**.
- A bid binds. Made one in error? Call the school at once.
- A new lowest bid in the last minutes pushes the end out, so there is no point waiting for the last second.
- Not bidding? Press **Tell the school I will not bid**.

Orders and deliveries

1. Open **Purchase orders** and click an order *Waiting for you to accept*.
2. Press **Accept the order**. If something is wrong with it, type it in the note and press **Ask the school a question** instead.
3. When you send goods, fill **Announce a delivery**: how much of each item you are sending now, **Your delivery note number** and **Arriving on**. Press **Tell the store it is coming**.

Deliver with a delivery note quoting the order number. **Take back** cancels an announcement the store has not received yet. Under **Deliveries** you then see what the school counted: what it accepted and what it rejected, and why, with the **GRN** to print. **Print the order** gives the order on paper.

Invoices and payments

Once the school has received goods, the order's **Invoices** card lets you invoice up to what it received and has not yet been invoiced:

1. Type **Your invoice number** and the **Amount (UGX)**.
2. Set the **Invoice date** and **Payment due**.
3. Attach a **Copy of the invoice (PDF or photo)**.
4. Press **Send the invoice**.

The school checks it against what it received. **Invoices & payments** shows what is **Approved, owed to you**, what is **Being checked by the school**, and what was **Paid to you**, every invoice with its status (a rejected one with the school's reason), and every payment with its voucher. **My statement** prints all of it with the running balance.

My products

Post what you sell the school, so its staff can pick from the Supplier catalogue.

1. Press **Add a product**.
2. Give the **Name**, the **Category**, your code if you have one, and a **Description**.
3. Say what it is **Sold by** (a piece, a kg, a bag…), the **Price per unit (UGX)**, the **Smallest order** and the **Delivery time (days)**. Tick **In stock now**.
4. Add quantity prices if you sell cheaper in bulk (**Add a quantity price**): up to six, each lower than the one before, optionally until an end date.
5. Add up to six pictures (JPG, PNG or WebP, 5 MB each). The first is the main one.
6. Press **Add to the catalogue**.

Each product's ⋮ menu marks it out of stock or in stock, hides it from the school or shows it again, and removes it. Every price change is kept and shown to the school. If the school takes a product off its catalogue, it says *Taken off by the school* with the reason.

My account

- **Change my password** at any time.
- **My details with** the school shows your business, sign-in name, phone, TIN and where you are paid. To change your name, phone or TIN, call the school.
- **Change where the school pays me**: type the new bank or mobile money details and press **Send for the school to confirm**. The school calls you on the number it already has before it pays to new details.

> ⓘ GOOD TO KNOW
>
> A supplier the school has suspended can still sign in but cannot quote, bid or invoice. A blacklisted supplier cannot sign in.

QUESTIONS

I forgot my password.
Call the school. The bursar or the procurement office sets a new one for you on the Suppliers page; you then choose your own.

Can I see the other suppliers' prices?
No. In a quotation you see only your own quote. In an auction you see what the school chose: your place only, your place and the lowest bid (never who made it), or nothing.

I placed a wrong bid. Can I take it back?
No: a bid binds. Call the school at once. Procurement can void a bid made in error, and your bid before it stands again.

When can I invoice?
Once the school has received goods on the order, for up to the value it received and has not yet been invoiced.

10

Messages and notices

Text parents, choose which messages go by themselves, and post notices and the school calendar.

Texts to parents and staff, the automatic messages (all off until your school turns them on), what to do when a text does not arrive, and the notices and calendar everyone sees.

How text messages work	6 min
Send a message to parents or staff	6 min
Automatic messages and templates	8 min
When a text does not arrive	6 min
Notices, news and events	4 min
The school calendar	4 min

How text messages work

The SMS wallet and what a text costs, the switches that let your school send, and why every automatic message starts off.

For: Bursar, Secretary, Head teacher, School administrator · app.schooldynamics.ug/help/messages/how-sms-works

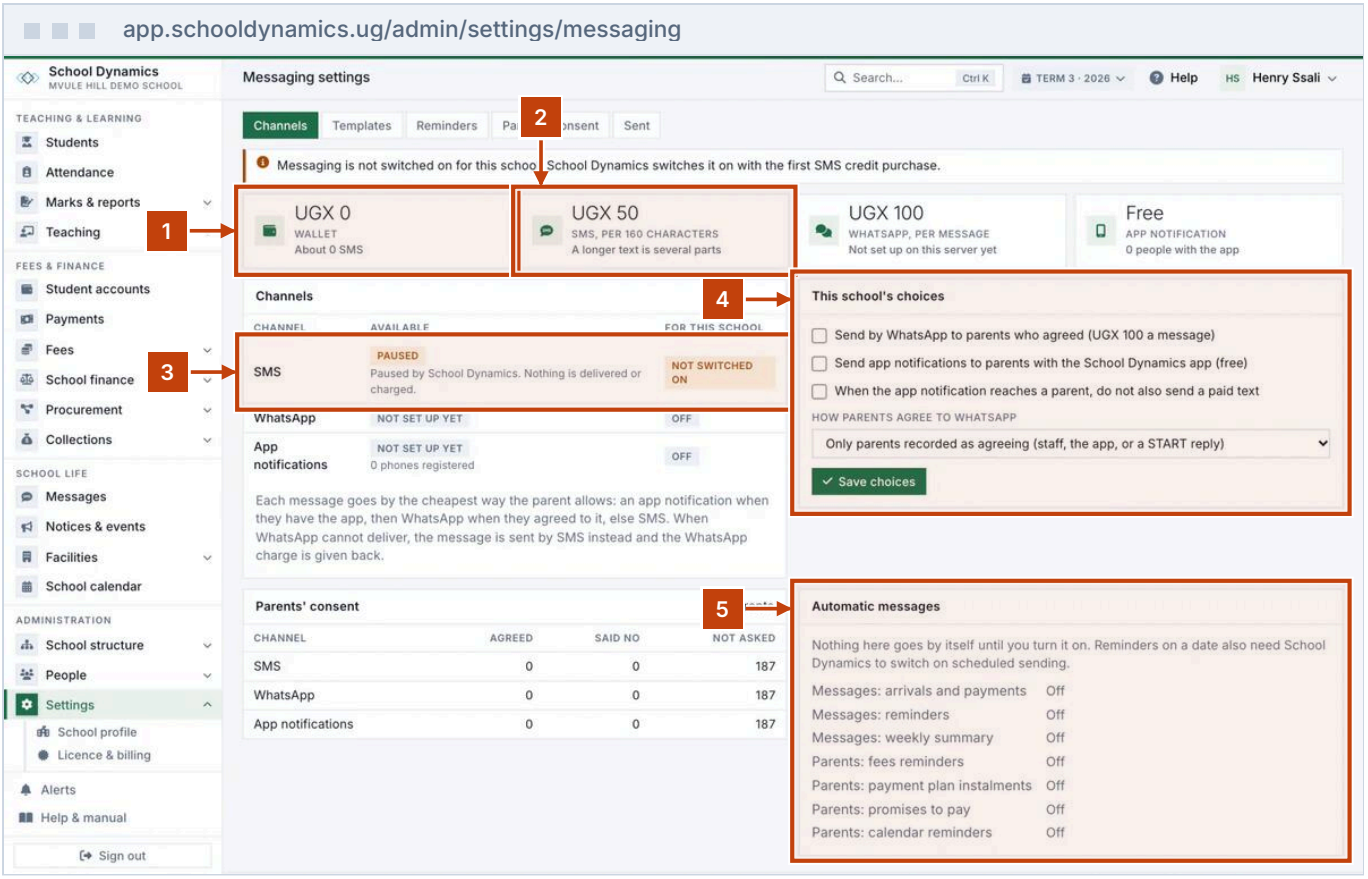
Text messages (SMS) are paid for from your school's SMS wallet. This lesson explains where that money comes from, what each text costs, and the switches that decide whether anything is sent at all. Read it before you send your first message.

Before you start

The **Messages** pages and **Settings › Messaging** are for the school administrator, the head teacher, the deputy, the director of studies, the bursar and the secretary.

The settings page

Open **Settings › Messaging** (or the **Settings** tab on the Messages page). The first tab, **Channels**, shows everything on this page at a glance.



The demo school · invented names and figures

1 The wallet: what is left for texts. Click it to see every movement.

2 What an SMS costs: UGX 50 for each 160 characters.

3 SMS: whether School Dynamics is delivering texts, and whether your school is switched on.

4 Your school's choices for WhatsApp and app notifications.

5 Automatic messages: nothing goes by itself until you turn it on.

- The wallet 1: what is left, and about how many texts that buys. Click it to open the wallet.
- The price 2: UGX 50 for each SMS part. WhatsApp and app notifications have their own figures beside it.
- The SMS row 3: **Available** says *Paused* when School Dynamics has paused texts. **For this school** says **On**, or **Not switched on**.
- **This school's choices** 4: which other ways your school uses (see below).
- **Automatic messages** 5: the jobs that send reminders by themselves, and when each last ran.

The wallet

Every school has one wallet for texts. SMS credit you buy goes in. Every SMS part that is sent comes out.

Open **School life › Messages** and the **Wallet** tab to see:

- **Balance**: what is left, and about how many texts that is.
- **Spent this month**.
- **Messaging**: **On** when your school can send texts.
- Every movement, newest first, with the **Balance after** it: each credit bought and each SMS part sent.

- **Credit purchases**: each one, whether it is paid, and whether it is **In the wallet** yet.

When the balance runs low, the page says so, with about how many texts are left. Nobody at the school can change the wallet by hand. It moves only when credit is bought or texts are sent.

Once your school can send texts, those who send messages also see the wallet in the top bar, with signal bars like a phone's: the fewer bars, the less is left. Click it to see what was spent this month, how long the balance lasts at this pace, and the last top-up; **Open the wallet** goes to the Wallet tab. When the wallet falls low, the alert *The SMS wallet is low* (or *is empty*) appears under **Alerts**. See Alerts.

Buy SMS credit

1. Open **Settings › Licence & billing** (the **Top up** button on the Wallet tab goes there too).
2. Under **SMS credit**, press **Buy SMS credit**.
3. Type the amount, from UGX 5,000 to UGX 5,000,000. UGX 50 buys one SMS part.
4. Press **Order and pay** to pay online. When online payment is not available, the button says **Order — get the invoice**: pay the invoice the usual way.

The credit goes into the wallet as soon as the payment is confirmed. Your school's first purchase also switches messaging on. Licence & billing is open to the school administrator, the head teacher, the deputy, the bursar and the finance officer. See Licence and billing.

What a text costs

Way	Cost	Used when
SMS	UGX 50 for each part of up to 160 characters	Always, while your school may send
WhatsApp	UGX 100 a message, any length	School Dynamics has set it up, your school switched it on, and the parent agreed
App notification	Free	The parent has the School Dynamics app, and your school switched it on

A message longer than 160 characters is cut into parts, numbered 1/2, 2/2 and so on. The numbers take a little room, so each part holds a few characters fewer. Before anything goes, the page shows the number of parts and the cost.

A part is charged only when the SMS company accepts it. Nothing is charged for a person with no valid phone number, for a parent who asked not to get SMS, or while School Dynamics has paused texts.

The whole cost is checked against the wallet first. If the wallet does not cover it, the message does not go, and you see a sentence like *This message costs UGX 12,500 (250 SMS); the wallet has UGX 8,000. Top up the wallet first.*

Which way a message goes

Messages you write yourself on the **Messages** page always go by SMS.

The school's ready-made messages (templates, reminders, and reminders about notices) go by the cheapest way each parent allows:

1. an app notification, when the parent has the app (free);
2. WhatsApp, when the parent agreed to it (UGX 100);
3. otherwise SMS (UGX 50 a part).

When WhatsApp cannot deliver a message, it is sent by SMS instead and the WhatsApp charge goes back into the wallet.

Choose the ways your school uses under **This school's choices** 4 : tick **Send by WhatsApp to parents who agreed**, **Send app notifications to parents with the School Dynamics app (free)**, or **When the app notification reaches a parent, do not also send a paid text**, then press **Save choices**. A way that you switched on but School Dynamics has not set up yet says *On, waiting for the server*.

The switches

All of these must be on before a text leaves the school:

1. **School Dynamics is delivering texts.** School Dynamics can pause texts for every school at once. While they are paused, the messages pages say *Text messages are paused by School Dynamics, so nothing is being delivered or charged.* Messages sent then are recorded as not sent, with the reason *Not sent: text messages are paused by School Dynamics. Nothing was charged.* They do not go later by themselves: send them again once texts are back.
2. **Your school may send messages.** This is switched on by itself when your school's first SMS credit payment is confirmed. Until then, the pages say *Messaging is not switched on for this school yet*, and **Send now** cannot be pressed (drafts can still be saved). After that, the school administrator or the owner can turn it off and on again: **Settings › School profile**, tab **Messages**, press **Edit**, then set **Send messages** to **On** or **Off**. With it off, no SMS leaves the school, whatever is in the wallet.
3. **The wallet covers the cost.**
4. **For a ready-made message: that message is On.** Each message template is switched on or off by itself. A message that is off is never sent, by hand or by itself.

Automatic messages start off

A message that goes by itself (when a payment is recorded, when a child arrives at school, on a reminder date) starts **Off** in every school. Nothing goes by itself until someone at your school switches it on.

The one exception is the code a parent asks for to open the parents' pages on the web. It starts **On**, because the parent is waiting for it as they ask. If you switch it off, your parents cannot sign in there. See Signing in with a parent code.

Messages that a person sends by hand, such as **Report card ready** or **Early closure or emergency**, start **On**. They still go only when someone presses **Send now**. Three of them (**Balance and how to pay**, **Visiting day** and **Exam timetable**) can also go by themselves on a date, but only after you type that date on the message.

Reminders on a date also need School Dynamics to switch on scheduled sending for your school. Until then, the **Automatic messages** box 5 says *Nothing here goes by itself until you turn it on. Reminders on a date also need School Dynamics to switch on scheduled sending.*

To switch messages on and change their words, see Automatic messages and templates.

> **GOOD TO KNOW**
>
> Messages go out one by one in the background, so a long list takes a few minutes. You can leave the page: sending carries on.

QUESTIONS

How much does one text cost?
UGX 50 for each SMS part of up to 160 characters. A longer message is cut into parts, and the page shows how many before anything is sent.

We bought credit, but nothing can be sent. Why?
Open **Settings › Messaging**. Check that the wallet shows the credit (it arrives once the payment is confirmed), that the SMS row says **On** for your school, and that the page does not say texts are paused by School Dynamics.

Is a text charged when it fails?
No. A part is charged only when the SMS company accepts it. Nothing is charged for a person with no valid number, for a parent who asked not to get SMS, or while School Dynamics has paused texts.

Can someone at the school change the wallet balance?
No. The wallet moves only when credit is bought or texts are sent. Every movement is listed on the **Wallet** tab.

Send a message to parents or staff

Write a text, choose who gets it, check the cost before it goes, then follow how each one went.

For: Secretary, Head teacher, Bursar, Director of studies, School administrator · app.schooldynamics.ug/help/messages/sending-a-message

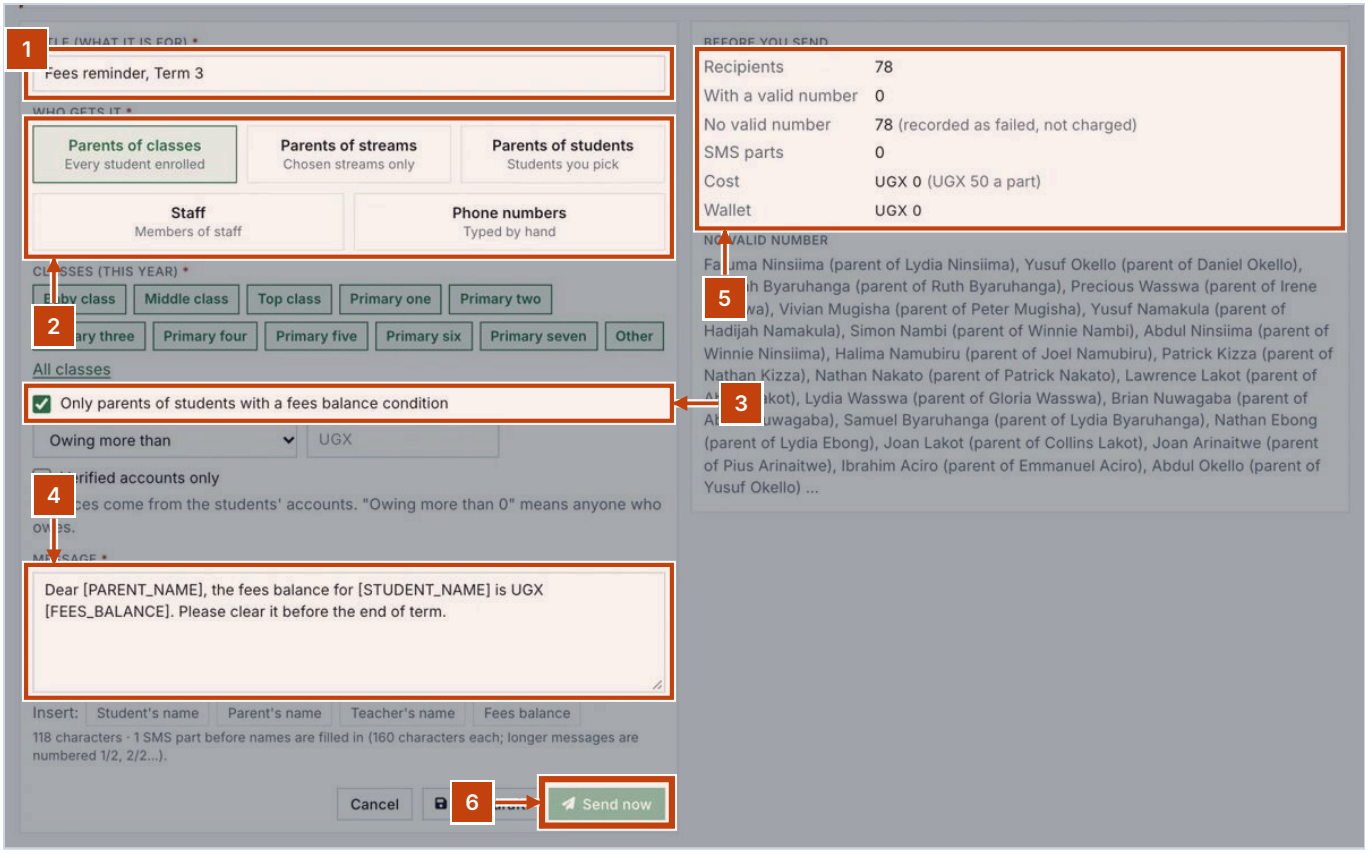
Use **Messages** to text the parents of whole classes, streams or chosen students, members of staff, or any phone numbers. Each text is paid for from the school's SMS wallet, and the page shows the cost before anything goes.

Before you start

- You need to be the school administrator, the head teacher, the deputy, the director of studies, the bursar or the secretary.
- Your school must be able to send texts, and the wallet must cover the cost. See How text messages work.
- The classes and streams you can choose are those of the school's active academic year.

Write and send a message

Open **School life › Messages** and press **New message**.



The demo school · invented names and figures

1. A title, so you can find the message later. Parents do not see it.
2. Who gets it.
3. Only parents of students who owe (or whose balance is exactly an amount).
4. The message. The buttons under it put in names and the fees balance.
5. Before you send: how many people, how many SMS parts, the cost and the wallet.
6. Send now asks you to confirm the number of people and the cost.

1. Type a **Title (what it is for)** 1, for example *Fees reminder, Term 3*. Only staff see it: it names the message in the list.
2. Choose **Who gets it** 2 (see the table below), then tick the classes, streams or staff, pick the students, or type the numbers.
3. To text only parents who owe, tick **Only parents of students with a fees balance condition** 3. Choose **Owing more than** and type an amount (0 means anyone who owes), or **Balance exactly**. Tick **Verified accounts only** if you want only verified accounts.
4. Write the **Message** 4. Use the buttons under it to put in names and the balance (see Names and the balance in a message).
5. Read **Before you send** 5, and the examples under **As they will read it**.
6. Press **Send now** 6. A box asks, for example, *Send to 245 recipients for UGX 12,250?* Press **OK**.

The message's own page opens, and a note says how many it went to. The texts go out one by one in the background: the page shows **Sending** until they have all gone.

Who gets it	Who receives the text
Parents of classes	The parent of every student in the classes you tick, active or pending. **All classes** ticks them all.
Parents of streams	The same, for the streams you tick.
Parents of students	The parents of the students you pick. Type a name or student number, then click the student.
Staff	The members of staff you tick. **All staff** ticks everyone.
Phone numbers	The numbers you type, one per line or separated by commas: 07..., 256... or +256....

For a student, the text goes to the parent on record. With no parent on record, it goes to a parent whose phone is the student's emergency number, and failing that to the numbers on the student's own record.

> ⚠ **CAREFUL**
>
> A text cannot be called back once it has gone. Read the examples under **As they will read it** before you press **Send now**.

Before you send

The box on the right 5 works itself out again each time you change the message or the people:

Line	Means
Recipients	Everyone the message is for.
With a valid number	Those it will be sent to.
No valid number	Their texts are recorded as failed and not charged. Their names are listed below.
Asked not to get SMS	Parents who said no to texts. They are left out and not charged.
Same text, same number	Texts merged because the same words would go to the same phone twice.
SMS parts and **Cost**	The number of SMS parts in all, at UGX 50 a part.
Wallet	What the wallet holds now. If it does not cover the cost, the box says so.

Under the message, a line counts the characters and the SMS parts *before names are filled in*. A long name or balance can add a part for some people; the **Cost** line counts every text as it will really go.

Names and the balance in a message

The buttons under the message put a placeholder where the cursor is. Each person's text gets their own detail:

Button	Puts in	Becomes
Student's name	[STUDENT_NAME]	The student's name. For a message to staff, the staff member's name.
Parent's name	[PARENT_NAME]	The parent's name.
Teacher's name	[TEACHER_NAME]	For a message to staff, the staff member's name.
Fees balance	UGX [FEES_BALANCE]	The student's fees balance, as a number: *UGX 280,000*.

> ⚠ CAREFUL
>
> The balance is shown without its minus sign, so a student who has paid in advance would also show an amount. Texts about money owed should use the condition **Owing more than** 0 3 . Use **Teacher's name** only in messages to staff: in a message to parents it becomes the student's name.

Save a draft

Press **Save draft** to keep the message without sending it. You can save a draft even while your school cannot send.

A draft keeps the title, the message and who it is for. The recipients and their balances are worked out only when it is sent, so a draft sent next week uses next week's balances. To finish it later, choose **Drafts** in the list and press the pencil button (or **Edit draft** in its quick view, or **Edit and send** on its page).

When the page refuses

You see	Do this
Give the message a title (what it is for).	Type a title.
Choose at least one class. (or stream, student, member of staff)	Tick or pick someone.
These are not valid Ugandan phone numbers: …	Correct the numbers listed.
No one matches this audience.	The classes chosen have no students, or nobody meets the fees condition.
None of these people has a valid phone number on record.	Correct their numbers first. See When a text does not arrive.
This message costs … Top up the wallet first.	Buy SMS credit, or send to fewer people.
The message is too long: at most 1000 characters.	Shorten it.

The list of messages

School life › Messages opens on **Bulk messages**: every message, newest first, with who it went to, **Recipients**, **Sent**, **Failed** and **Cost**. Use **All**, **Sent** and **Drafts**, or search the title and text. At the top, **Failed this month** opens the failed ones.

Click a title for a quick view: the text, how many were **Reached** and **Not sent**, and the first numbers not reached with the reason. From there, **Every recipient** opens the message's page, and **Copy into a new message** starts a new draft with the same people and words.

A message's page

The page of one message shows the text and, beside it, who it was for, the **State** (**Draft**, **Sending**, **Sent**, **Partly sent** or **Not sent**), the counts, and **SMS charged**.

Below is one row per person: their name (and the student it was about), the number used, the **Status**, the SMS **Parts** and the **Tries**. Search for a name or number, or choose a status. The eye button opens the full details of one text.

- **Send failed ones again** sends every failed text again. It asks first: *Each part sent costs UGX 50.*
- **Copy into a new message** starts a new draft from this one.
- **Edit and send** shows on a draft.

What each status means, and how to fix a failed text, is in When a text does not arrive.

> GOOD TO KNOW
>
> Parents who asked not to get SMS are never texted and never charged for, even when their child's class is chosen. Their row says why.

QUESTIONS

A parent has three children in the classes I chose. Do they get three texts?
Only if the text is different for each child, for example because it names the child. The same text to the same number goes once.

Can I text a number that is not in the system?
Yes. Choose **Phone numbers** under **Who gets it** and type the numbers, one per line or separated by commas.

Can I send a message later, on a set day?
Not from this page: **Send now** sends at once. For reminders on a date, use the school's ready-made messages. See Automatic messages and templates.

Can I change a message after it has gone?
No. Open it, press **Copy into a new message**, change the copy and send that.

Some messages say "From the old app". Can I send them again?
They were sent by the old School Dynamics. You can read them and copy them into a new message, but they are not sent from here.

Automatic messages and templates

Choose which of the school's ready-made messages may go, change their words, set reminder dates, and send one by hand.

For: Secretary, Head teacher, Bursar, School administrator · app.schooldynamics.ug/help/messages/automatic-messages

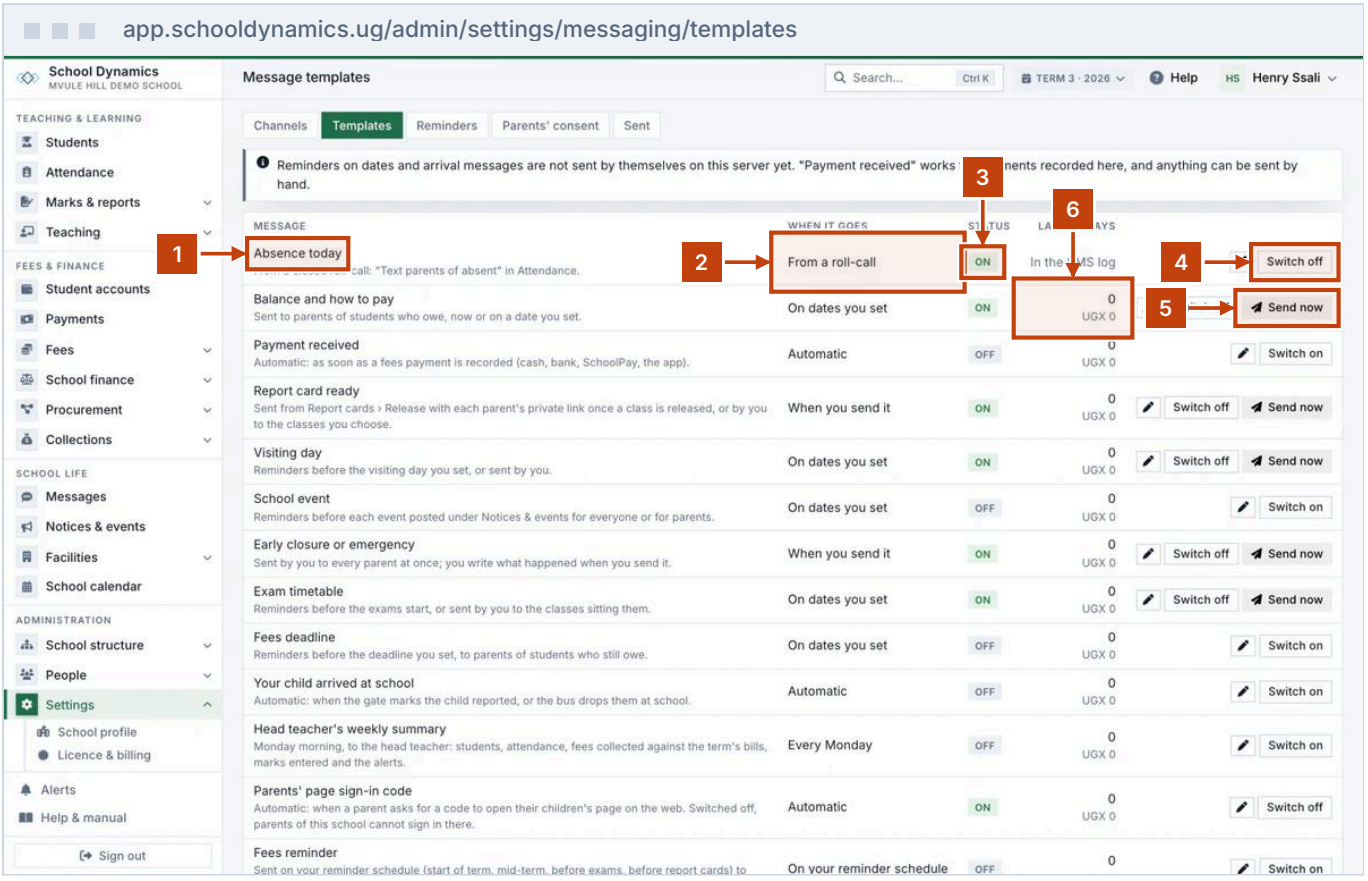
The school has a set of ready-made messages: a text when a fees payment is recorded, a fees balance reminder, *report card ready*, an emergency message, and more. Each is a message template with its own words, and each is **On** or **Off**. You choose which ones may go, change their words, and send some of them by hand.

Before you start

- You need to be the school administrator, the head teacher, the deputy, the director of studies, the bursar or the secretary.
- Every automatic message starts **Off**. Nothing goes by itself until you switch it on. Why, and the other switches, are in How text messages work.

The messages

Open **Settings › Messaging** and the **Templates** tab.



The demo school · invented names and figures

1 The message. Click it to read or change its words.

2 When it goes: automatically, on dates you set, when you send it...

3 On or Off. An Off message is never sent.

4 Switch it on or off.

5 Messages sent by hand have Send now.

6 How many went in the last 30 days, and what they cost.

Each row is one message 1, with a line saying what it is for. **When it goes** 2 says what sends it:

It says	The message goes
Automatic	By itself, when the system sees it happen (a payment recorded, a child arriving).
On dates you set	On the days before a date you type on the message, at the time you choose.
When you send it	Only when someone presses **Send now**.
From a roll-call	From a closed roll-call, when someone presses the button to text parents of absent pupils. See Taking a roll-call.
Every Monday	Monday morning, to the head teacher.
On your reminder schedule	By the **Reminders** tab (below).

The **Status** 3 is **On** or **Off**. Press **Switch on** or **Switch off** 4 to change it. Messages sent by hand have **Send now** 5. **Last 30 days** 6 counts what each message sent and what it cost.

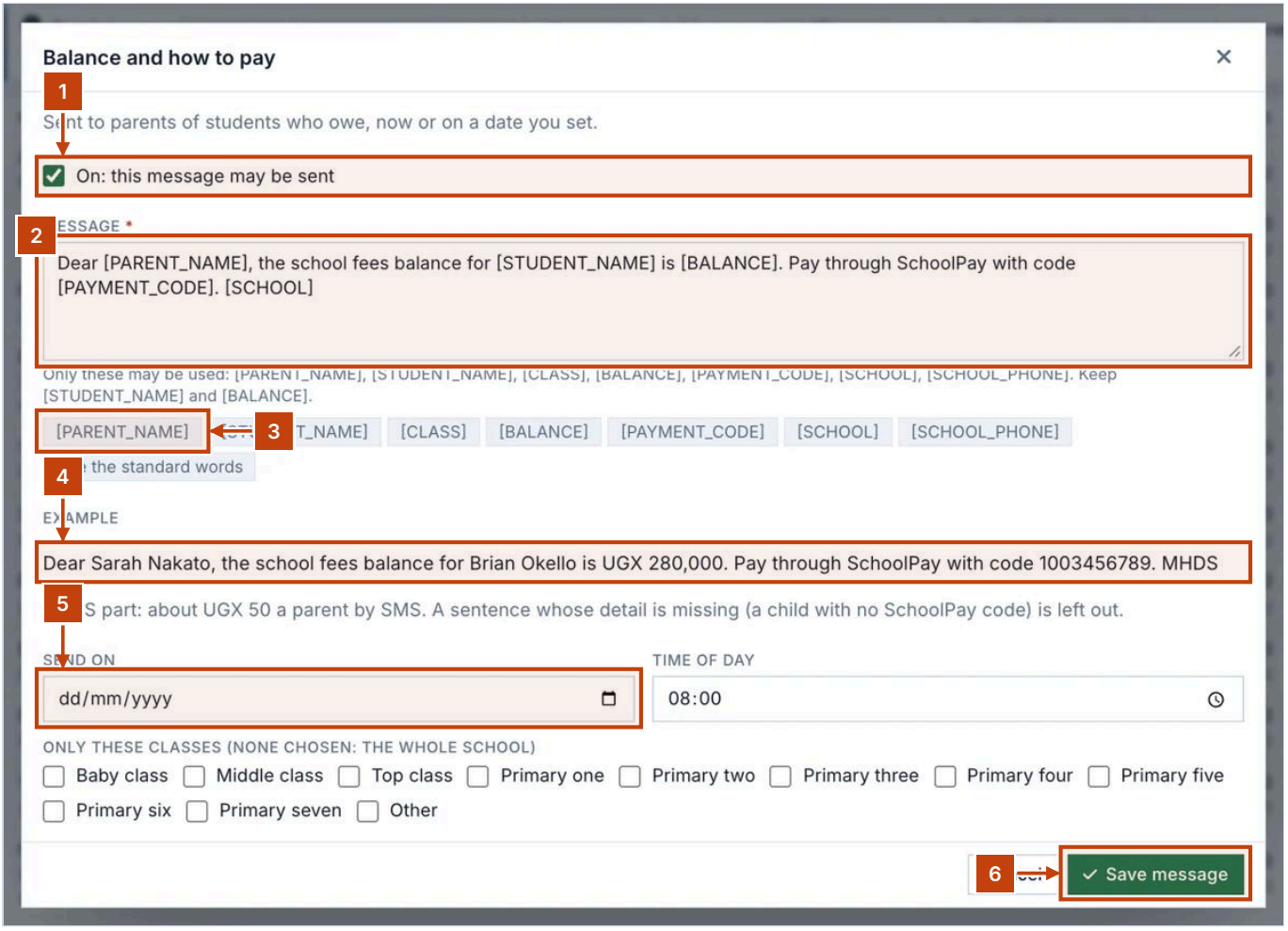
These are the messages, and how each one starts in a new school:

Message	When it goes	Starts
Absence today	From a roll-call	On
Balance and how to pay	On dates you set, or by hand	On
Payment received	Automatic, when a fees payment is recorded	Off
Report card ready	By hand, or from Report cards › Release	On
Visiting day	On dates you set, or by hand	On
School event	Before each event posted under Notices & events	Off
Early closure or emergency	By hand, to every parent	On
Exam timetable	On dates you set, or by hand	On
Fees deadline	On dates you set, to parents of students who owe	Off
Your child arrived at school	Automatic, from the gate or the school bus	Off
Head teacher's weekly summary	Every Monday	Off
Parents' page sign-in code	Automatic, when a parent asks for a code	On
Fees reminder	On your reminder schedule	Off
Payment plan instalment	On your reminder schedule	Off
Promise to pay	On your reminder schedule	Off
Calendar reminder	On your reminder schedule	Off
Your children's page	By hand	On
Record copy answered	Automatic	Off
Missing at night roll-call	Automatic, to the matron, patron and head teacher	Off
Seen at the sick bay	Automatic	Off
Serious sick-bay case	Automatic, to the head teacher	Off
Visiting time reminder	Automatic, the day before a visiting day	Off

Messages marked **On** that go by hand still wait for someone to press **Send now**. **Balance and how to pay**, **Visiting day** and **Exam timetable** go by themselves only once you type a date on them.

Change a message's words

Click the message's name, or its pencil button.



The demo school · invented names and figures

1. On: this message may be sent.
2. The words parents get.
3. The details this message may use. Click one to add it.
4. An example as a parent would read it, with its SMS parts and cost.
5. For a reminder: the date, and the time of day it goes.
6. Save the message.

1. Tick or untick **On: this message may be sent** 1.
2. Change the **Message** 2.
3. To add a detail, click its button 3, for example **[STUDENT_NAME]**. Hover a button to see what it becomes. **Use the standard words** puts the original words back.
4. Read the **Example** 4: the message as a parent would get it, with its SMS parts and what it costs a parent.
5. For a reminder, set the date 5 (for example **Send on**, **Visiting day** or **Exams start**), **Days before, to remind** (for example *7, 1*: a week before and the day before), the **Time of day**, and **Only these classes** (none ticked means the whole school).
6. Press **Save message** 6.

A message with your own words shows **Your words** in the list.

The rules:

- Each message may use only its own details. Otherwise you see, for example, *This message cannot use [BALANCE]. It may use [STUDENT_NAME], [TIME], [SCHOOL].*
- Some details must stay: *Keep [STUDENT_NAME] in the message, so the parent knows what it is about.*
- A message is at most 1,000 characters.
- A sentence whose detail is missing for someone is left out of their text. A child with no SchoolPay code gets the message without the "SchoolPay code" sentence.

Common details:

Detail	Becomes
[SCHOOL]	The school's short name
[PARENT_NAME], [STUDENT_NAME], [CLASS]	The parent's name, the child's name, the child's class
[BALANCE]	What is still owed, with the money sign: *UGX 280,000*
[PAYMENT_CODE]	The child's SchoolPay code
[AMOUNT]	The amount paid
[DATE], [TIME], [TERM]	The date the message is about, the time, the term
[EVENT], [PLACE]	An event's title and where it happens
[MESSAGE]	What you write when you send it (the emergency message)
[LINK]	A private link to the parent's own page on the web (for **Report card ready**, the report card itself)

Reminders on a date

For **Balance and how to pay**, **Visiting day**, **Exam timetable** and **Fees deadline**, type the date on the message and save it. The reminder goes at the **Time of day** (08:00 unless you change it) on each of the **Days before** you chose, to the classes you ticked, while the message is **On**. **Balance and how to pay** has no days before: it goes on its **Send on** day.

School event needs no date: it reminds parents before each event posted under **Notices & events** for everyone or for parents.

- Fees reminders go only to parents of students who owe.
- If a whole batch costs more than the wallet holds, it is not started. The row then says, for example, *Not sent on 05 Nov 2026, 08:00: 412 messages cost UGX 20,600 and the wallet has UGX 9,000. Top up; it is tried again at the next run.*
- A reminder missed while the server was off is still sent if it is no more than two days late, and never once the event it is about has passed.

When School Dynamics has not yet switched on scheduled sending for your school, the Templates tab says *Reminders on dates and arrival messages are not sent by themselves on this server yet.* "Payment received" still works for payments recorded in School Dynamics, and any message can be sent by hand.

Send a message by hand

1. Make sure the message is **On**.
2. Press **Send now** on its row.
3. Tick the **Classes** it is for. None ticked means the whole school.
4. For some messages, choose the date. For **Early closure or emergency**, write **What happened**: short and clear, under 600 characters.
5. Read the figures: how many **Messages**, the **Cost** (SMS, WhatsApp and app notifications), and what is **In the wallet**. Read the examples.
6. Press **Send** (the button says how many, for example **Send 230 messages**).

Only parents of active students get these messages. A message about a child goes once for each child; a message about the school (an emergency, an event) goes once to each parent.

The dialog does not let you send when, for example, *This message is switched off. Switch it on first.*, *No active student in this choice owes the school.*, or the wallet is short. Pressing send twice in the same dialog sends nothing new: *Nothing new to send: these were already sent.*

Report card ready is usually sent from the release page, with each parent's private link to the card. See Checking, approving and releasing.

The Reminders tab

The **Reminders** tab gathers the reminders to parents that follow the school's own dates. Each has **Switch on** and **Switch off**, and shows what the next one will cost against the wallet before anything goes.

- **Fees reminders**: the balance and how to pay, to parents of students who owe. Press **Change the schedule** to choose the moments: **Days after the term opens**, **Mid-term**, **Days before exams**, **Days before report cards** (and the day **Report cards come out on**), the **Time of day**, **Only students owing more than (UGX)**, and the classes. Leave a moment empty to skip it. Press **Save the schedule**. Each moment of the term is then listed as **Coming**, **Due now**, **Sent** or **Passed**.
- **Payment plan instalments**: before an instalment falls due, on the day, and after it is missed, while it is unpaid.
- **Promises to pay**: before the day a parent promised to pay by, on the day, and after it is missed, while the promise is not kept. See Promises to pay.
- **Calendar reminders**: before each entry for parents on the school calendar, on the days set on the entry. See The school calendar.

The words of these reminders are changed on the **Templates** tab. The fees side of reminders is in Reminders and demand notices.

Who got what: the Sent tab

The **Sent** tab lists every ready-made message: who it went **To**, which message, **By** which way (SMS, WhatsApp or app notification), the **Status** (**Sent**, **Failed**, **Not sent (opted out)**, **Waiting** or **Sending**) and **When**. Choose a message or a status, or search the text or number.

Click a name to read the text, the number, why a cheaper way was not used, and why it failed. For a text, **SMS log** opens **All messages**. When a message failed, see When a text does not arrive.

Good to know

- Switching a message on records the moment. **Payment received** and **Your child arrived at school** never text about payments or arrivals from before that moment.
- Each message goes once: a payment once, an arrival once a day for each child, a reminder once for each date and child.
- Payments recorded in School Dynamics are texted at once. Payments that arrive another way, such as SchoolPay, are picked up by the regular check, which runs only when scheduled sending is on.

QUESTIONS

If we switch on "Payment received", will parents get texts about old payments?
No. It texts only payments recorded after the moment you switch it on.

Why can I not press Send now on a message?
The message is switched off. Press **Switch on** on its row first.

Can I take [STUDENT_NAME] out of a message?
Not from a message that needs it. Some details must stay so the parent knows which child it is about; the dialog says which.

A child has no SchoolPay code. What does the parent get?
The message without the sentence that holds the code. A sentence whose detail is missing is left out.

We switched a reminder on but nothing went. Why?
A reminder on a date needs its date typed on the message, the wallet to cover the whole batch, and School Dynamics to have switched on scheduled sending for your school. The row shows a note when a batch could not go.

When a text does not arrive

Find a text that failed, read why, fix the phone number or the wallet, send it again, and record a parent who wants no texts.

For: Secretary, Bursar, Head teacher, School administrator · app.schooldynamics.ug/help/messages/when-a-text-does-not-arrive

Most texts that do not arrive have a plain reason: no valid phone number, an empty wallet, or a parent who asked not to get texts. This lesson shows where to find a failed text, what its reason means, and how to fix it.

Before you start

You need to be the school administrator, the head teacher, the deputy, the director of studies, the bursar or the secretary.

Find the text

- **School life › Messages**, tab **All messages**: every text the school sent or tried to send, one row per person. Choose **Failed** under the status, a bulk message, or dates, or search a name, number or words. The **Failed this month** figure on the Bulk messages tab opens this list with the failed ones.
- On a message's own page: one row per person it was for, with its status.
- **Settings › Messaging**, tab **Sent**: the school's ready-made messages and reminders, with the way each went.

Click a name, or the eye button, to open the text's details: the text itself, the number used, how many **SMS parts**, the student it was about, when it was created and sent, **Tried again** (for example *1 of 3 times*), and **Why it failed**. A long text also lists its parts, each with its own status.

What the status means

Status	Means	Do this
Sent	The SMS company accepted it for that number.	Nothing.
Pending or **Sending**	Waiting to go, or going now.	Wait a minute.
Partial	A long text: some parts went, some failed.	Send it again: only the failed parts go.
Failed	It did not go. The reason is under the name.	See the table below.
Stuck	It has said **Sending** for more than 15 minutes. It stopped half way and may or may not have arrived.	Ask the person. Then press **Mark failed** in its details, and send it again if they did not get it.

On the **Sent** tab, the statuses are **Sent**, **Failed**, **Not sent (opted out)**, **Waiting** and **Sending**.

Why it failed, and the fix

The reason says	Why	Fix
Invalid phone number: ... or *No valid phone number on record.*	No number on the person's record can be read as a Ugandan mobile number.	Correct the number (see below), then send it again.
Insufficient funds. Message requires 2 parts (UGX 100). Current balance: UGX 40	The wallet ran out.	Buy SMS credit, then send it again.
Messages are not enabled. or *Messaging is not switched on for this school...*	Your school's messaging switch is off.	See How text messages work.
Not sent: text messages are paused by School Dynamics. Nothing was charged.	School Dynamics had paused texts.	Send it again once texts are back.
Not sent: this person asked not to get SMS from the school.	The parent said no to texts.	Leave it. Change their choice only if they ask (below).
Stopped while sending: it may or may not have been delivered. Marked failed by a person.	It was stuck and someone marked it failed.	Check with the person before sending it again.
A message from the SMS company, such as *EUROSATGROUP API Error ...*	The SMS company refused it.	Check the number and send it again. If it keeps failing, ask for help: see Getting help.

Send it again

- One person: press the round-arrow button on their row, or **Send again** in the text's details.
- Every failed text of one bulk message: on the message's page, press **Send failed ones again**.

Both ask first: *Each part sent costs UGX 50.* The wallet must cover it, or you see, for example, *Sending again costs UGX 100; the wallet has UGX 40.*

Only texts sent from this School Dynamics can be sent again here. A text written by the old app can be copied into a new message instead. Messages on the **Sent** tab cannot be sent again from there.

> ⚠ CAREFUL
>
> **Send again** uses the number on the text, unless that number was not valid at all. If you corrected a number that looked valid but was wrong, send a new message to that parent instead.

How the phone number is chosen

For each person, School Dynamics looks at these numbers on their record, in this order, and uses the first that is a valid Ugandan mobile number:

1. the mobile number (phone 1);
2. the second phone;
3. the father's phone;
4. the mother's phone;
5. the spouse's phone;
6. the emergency phone.

A parent with no valid number gets the text on the first valid number of their child's record (the child added first). In a message to a class, a student with no parent on record is texted on the numbers of the student's own record.

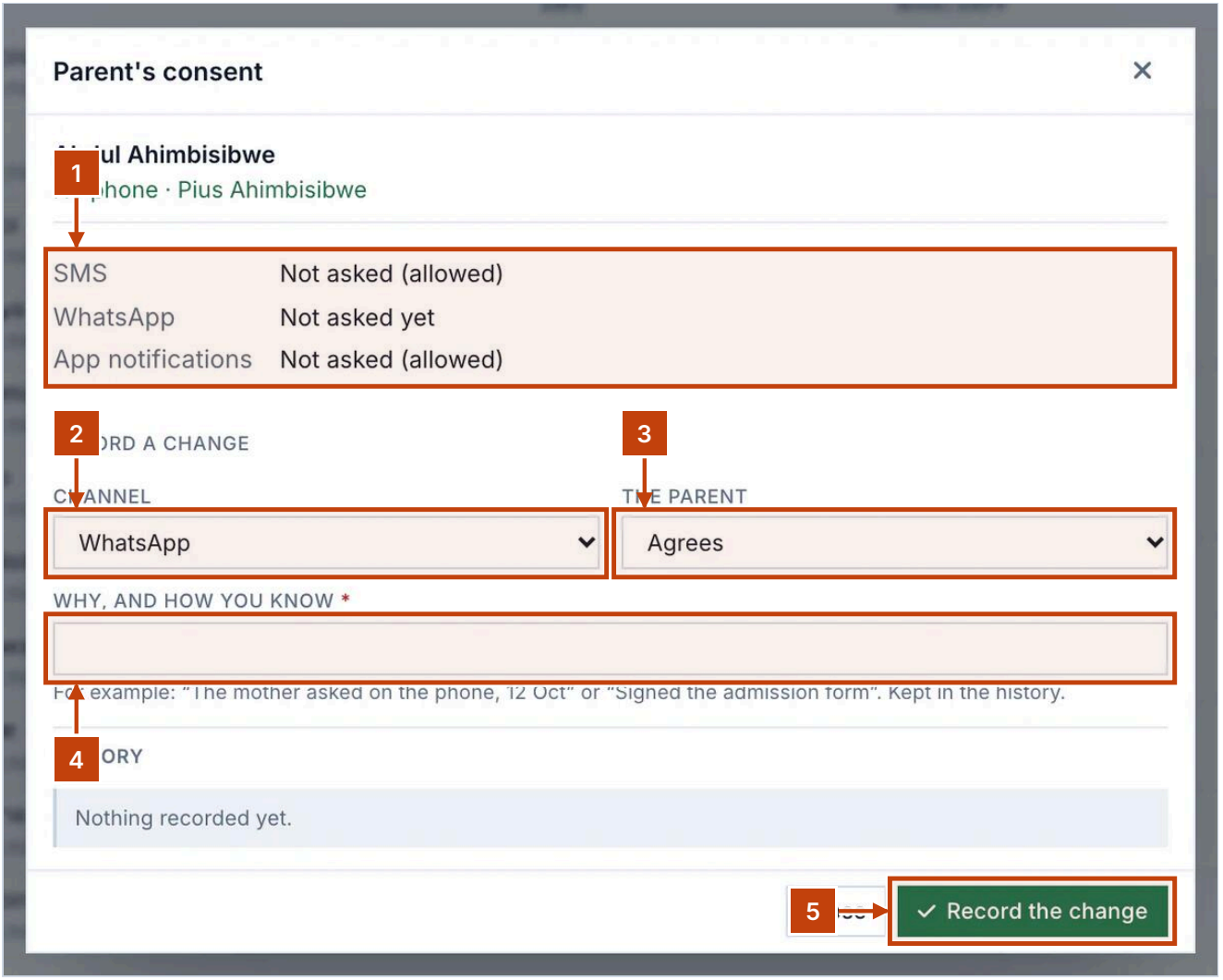
A number is valid when, once spaces and signs are taken out and the *256* or *0* at the front is dropped, nine digits are left. All of these work: *0772 123456*, *256772123456*, *+256 772 123456*, *+256 0772 123456*, *00256 772 123456*. When one box holds two numbers (*0772 123456 / 0701 234567*), the first valid one is used. A number with too few or too many digits is refused.

To correct a number, open the parent under **People › Parents**, or the student's page, and change it. See Parents and guardians.

A parent who does not want texts

Each parent chooses for each way of messaging: SMS, WhatsApp and app notifications. Open **Settings › Messaging** and the **Parents' consent** tab. The figures at the top count the parents who agreed to WhatsApp and those who said no. The list shows each parent's choice for each way; search a name or phone, or choose a way and a choice.

Click a parent to see their choices and record a change.



The demo school · invented names and figures

1. What this parent has agreed to, way by way.
2. The way: SMS, WhatsApp or app notifications.
3. Agrees or Says no.
4. Why, and how you know. It is kept in the history.
5. Record the change.

1. Read what the parent has agreed to 1.
2. Choose the **Channel** 2.
3. Choose what **The parent** wants 3: **Agrees** or **Says no**.
4. Type **Why, and how you know** 4, for example *The mother asked on the phone, 12 Oct.*
5. Press **Record the change** 5.

Every change is kept in the **History**, with who made it and why. Parents can also say no themselves: in the phone app, with the stop link, or by replying on WhatsApp. The history says which.

- A parent who said no to SMS gets no texts from the school. Their row says *Not sent: this person asked not to get SMS from the school.*, and nothing is charged.
- WhatsApp goes only to parents who agreed, unless your school chose on the **Channels** tab that its admission form already asks parents to agree.
- When WhatsApp cannot reach a number, the parent is marked *not on WhatsApp*, and they get SMS instead.

Good to know

- Apostrophes and curly quotes are taken out of a text before it is sent, because the SMS company's system does not accept them.
- A parent's sign-in code is hidden in the log as six stars once the text has gone or the code has been used.

QUESTIONS

The text says Sent, but the parent did not get it. Why?
Sent means the SMS company accepted the text for that number. School Dynamics gets no later report from the parent's phone. Check that the number on the text is the parent's current number.

How many times can a failed text be sent again?
A few times. The text's details say how many, for example *Tried again 1 of 3 times*. After that you see *This message has been tried the most times allowed.*

A parent wants no more texts from the school.
Record it on **Settings › Messaging › Parents' consent**, with the reason. From then on they get no SMS from the school, and nothing is charged for them.

I fixed a parent's number. Will "Send again" use the new one?
Only if the old number was not a valid number at all. If the old number looked valid but was wrong, send a new message instead.

Notices, news and events

Post news, notices and events to the School Dynamics app and the parents' pages, see who opened them, and remind parents who did not.

For: Secretary, Head teacher, Director of studies, School administrator · app.schooldynamics.ug/help/messages/notices-and-events

Notices & events is the school's notice board in the School Dynamics app and on the parents' pages. Post news, a notice or an event, with a photo or a file, for everyone or for one group. For notices meant for parents, you see how many opened them and can remind those who did not.

Before you start

- Everyone on the staff can read the posts here. Posting, changing and deleting them is for the school administrator, the head teacher, the deputy, the director of studies and the secretary.
- The school needs an active term: every post belongs to a term. Without one, the post button is greyed out and says *Set an active term first*. See Academic years and terms.

The page

Open **School life › Notices & events**. The tabs **News**, **Notices** and **Events** each show how many posts they hold. Choose **Published** or **Draft**, or search the titles.

Each row shows the title (with a picture or paper-clip mark when it has a photo or a file), who it is **For**, the **Event date** for events, its **Status**, when and by whom it was **Posted**, and how many **Views** it had in the app.

Post news, a notice or an event

1. Choose the tab: **News**, **Notices** or **Events**.
2. Press **Post news**, **New notice** or **New event**.
3. Type the **Title**.
4. Write the **Description**. It is plain text: leave a blank line between paragraphs.
5. Choose who it is **For**: **Everyone**, **Students**, **Parents**, **Teachers** or **Non-teaching staff**.
6. Choose the **Status**: **Published** shows it at once; **Draft** keeps it hidden until you publish it.
7. For an event, choose the **Event date**, with its time.
8. If you like, add a **Photo** (JPG, PNG, GIF or WebP, up to 4 MB) and a **File** (PDF, Word, Excel or a picture, up to 10 MB).
9. Press **Post**.

Who sees a post

In the app and on the parents' pages, only published posts are shown:

For	Seen by
Everyone	Parents, and every member of staff
Parents	Parents
Teachers	Every member of staff
Non-teaching staff	Members of staff who are not teachers
Students	Not shown to parents or staff in the app. An event for students shows on the school calendar.

On the **Notices & events** page itself, every member of staff sees every post, whoever it is for.

Published events also show on the school calendar on their date. When the **School event** message is switched on, parents get a reminder before each event for everyone or for parents (see Automatic messages and templates). Posting itself sends no text.

Read, change or delete a post

Click a title, or the eye button. The post opens with its text, photo and event date, who posted it and in which term, a link to **Open the file**, and its **Views in the app**. For a post meant for parents, **Opened by parents** says how many of them opened it out of how many it was meant for, and how many were reminded. **Lately** lists the names of those who opened it last.

- **Edit** changes the post. A new photo or file replaces the one shown in the app. A post stays in the term it was posted in.
- **Delete** removes it, after asking *Delete this post? It disappears from the app.*

Remind parents who did not open it

A published notice for **Everyone** or **Parents** has **Remind those who did not open it** while some of its parents have neither opened it nor been reminded. The button is for those who send messages: the school administrator, the head teacher, the deputy, the director of studies, the bursar and the secretary.

1. Open the post and press **Remind those who did not open it**.
2. Check the **Reminder** text. It is filled in for you; keep it under 480 characters (three SMS).
3. Read the figures: how many **Parents**, and how many get it in the app, by WhatsApp or by SMS; the **Cost**; and what is **In the wallet**.
4. Press **Remind** (the button says how many, for example **Remind 64 parents**).

Parents with the app get a free notification; the others get WhatsApp or SMS, paid from the SMS wallet. Each parent is reminded only once about each notice. A parent *opened* a post when they opened it in the app or on the parents' pages.

The dialog does not let you send when the post is a draft, is not for parents, everyone has opened it or been reminded already, your school cannot send messages, or the wallet is short.

> **TIP**
>
> For an urgent notice, publish it, wait a day, then remind those who did not open it. You pay only for the parents who missed it.

QUESTIONS

Does posting a notice text the parents?
No. Parents see it in the app and on their page. To text them too, use **Remind those who did not open it**, or send a message from **Messages**.

Why is the button to post greyed out?
Every post belongs to a term, so the school needs an active term first. Set one under **Academic years**.

Can I see which parents opened a notice?

You see how many of the parents it was meant for opened it, and the names of the people who opened it lately.

How do I take a notice down?
Open it and press **Delete**, or edit it and set its **Status** to **Draft**. Either way it leaves the app.

The school calendar

Terms, holidays, events, exam weeks and visiting days on one calendar. Add entries, remind parents before them, and put the calendar on a phone.

For: Secretary, Head teacher, Director of studies, Everyone · app.schooldynamics.ug/help/messages/school-calendar

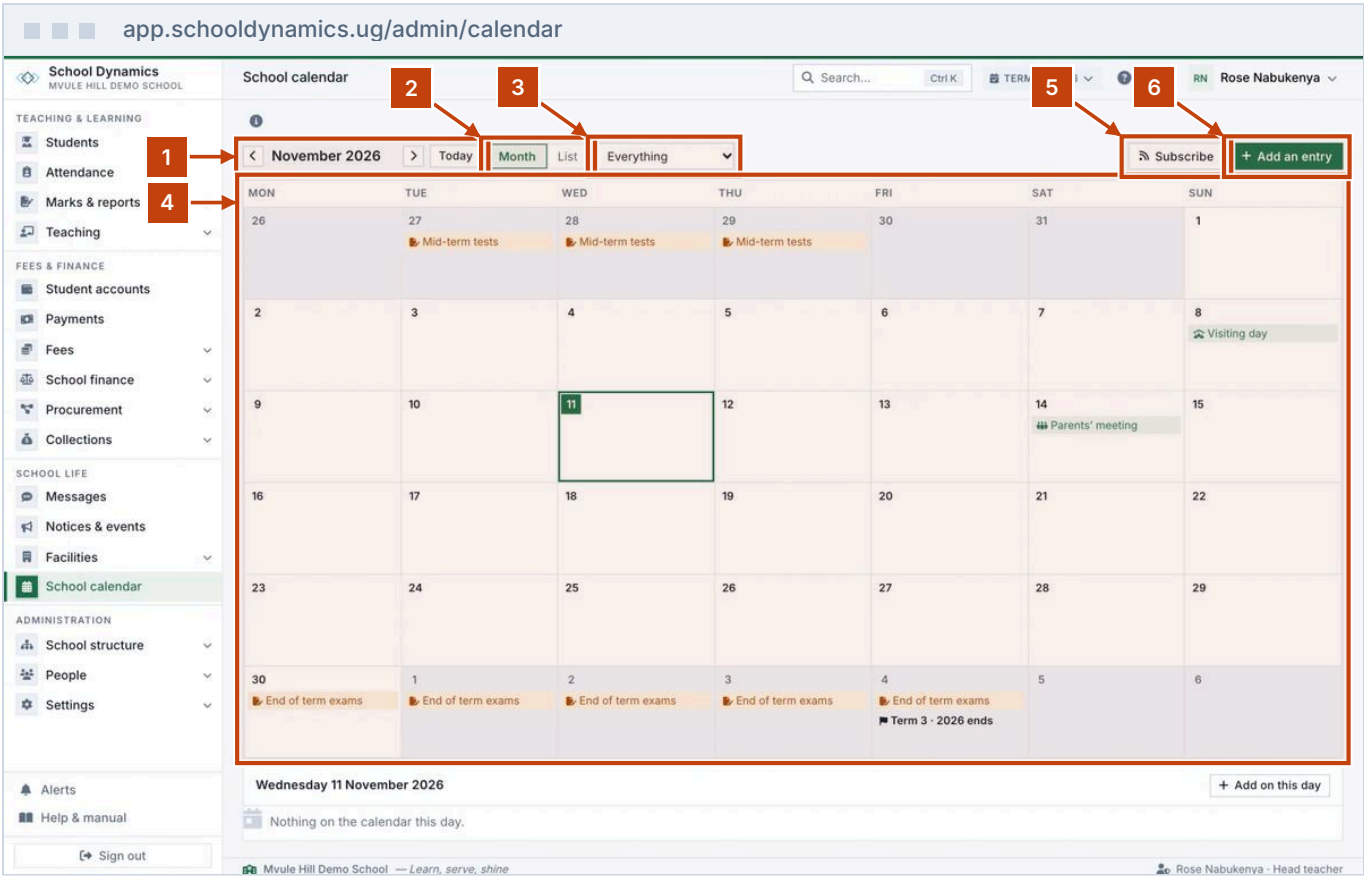
The school calendar puts the whole year in one place: the terms, holidays, events, exam weeks, visiting days and events posted as notices. Everyone on the staff can read it. The head teacher's office, the director of studies and the secretary keep it.

Before you start

- Every member of staff can open the calendar. Adding, changing and removing entries is for the school administrator, the head teacher, the deputy, the director of studies and the secretary.
- Some entries come from other pages and are changed there: the terms (from **Academic years**), exam weeks (from published exam timetables) and events posted under **Notices & events**.

Read the calendar

Open **School life › School calendar**.



The demo school · invented names and figures

1 The month. The arrows move a month; Today comes back.

2 A month grid or a list.

3 Show only one kind: terms, holidays, exam weeks, visiting days...

4 Click an entry to read it. Click a day to list its entries below the month.

5 Put the calendar in your phone's calendar.

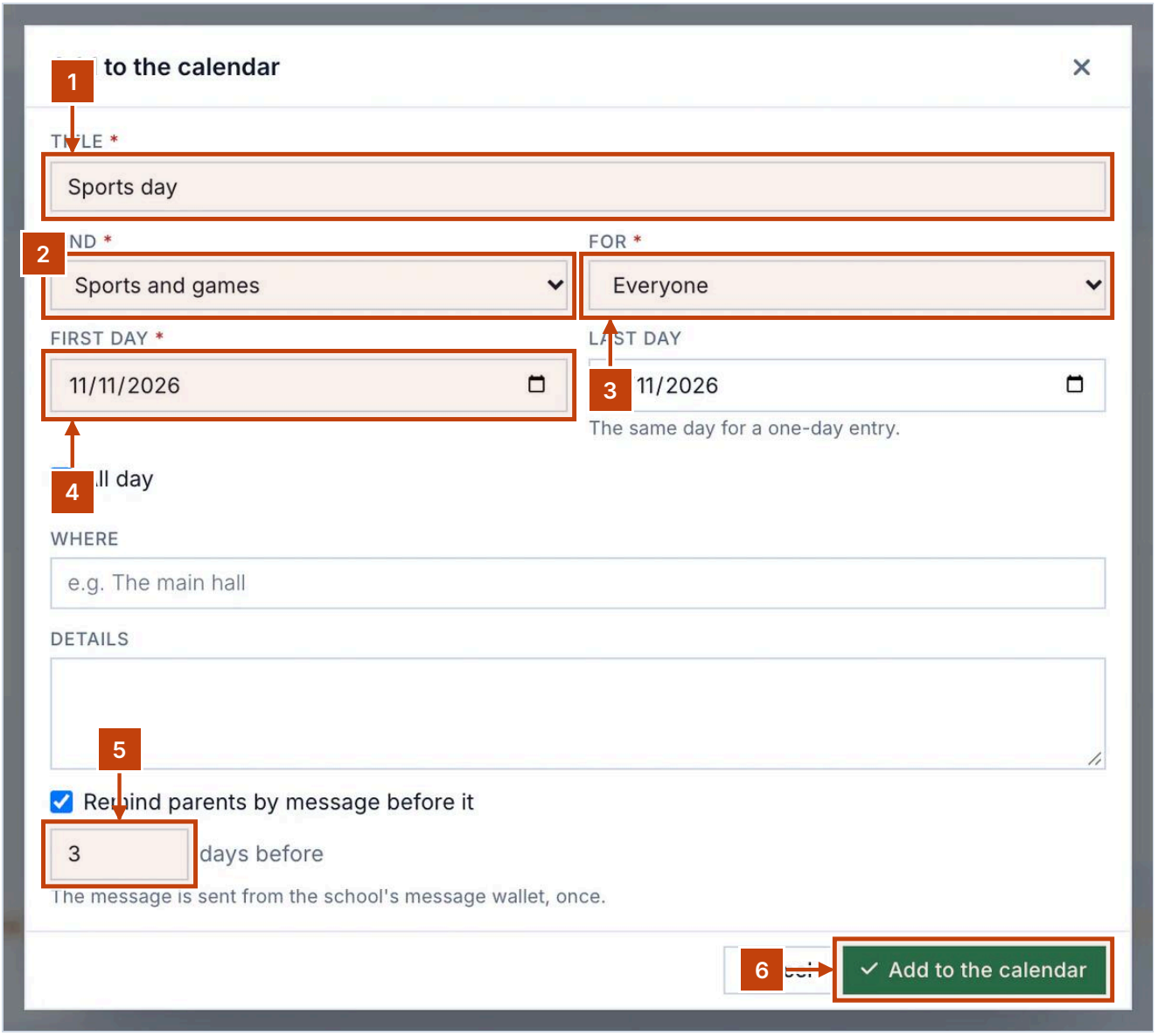
6 Add an entry.

- Move between months with the arrows 1. **Today** brings you back to this month.
- Choose **Month** or **List** 2. The list shows the month's entries in a table, with who each is for and its reminder.
- **Show only** 3 one kind: **Terms**, **Holiday**, **School event**, **Exam week**, **Visiting day**, **Meeting**, **Sports and games** or **Notices**.
- Click an entry 4 to read it: when, who it is for, where, and its reminder. Click a day's number to list that day's entries under the month (on a phone, this is the easiest way to read a day).

When you open an entry that comes from another page, the dialog says where it is kept and has a button to go there: **Academic years** for a term, **Exam timetable** for an exam week, **Notices & events** for an event posted as a notice. Your own invigilation duties from the exam timetable show on your calendar too.

Add an entry

Press **Add an entry** 6, or the small + on a day of the month to start on that day.



The demo school · invented names and figures

1. What it is.
2. The kind of entry.
3. Who it is for: everyone, parents, or staff only.
4. The first day. Add the last day for an entry of several days.
5. Remind parents by message this many days before.
6. Add it to the calendar.

1. Type the **Title** 1, for example *Sports day* or *Half-term break*.
2. Choose the **Kind** 2: **Holiday**, **School event**, **Exam week**, **Visiting day**, **Meeting** or **Sports and games**.
3. Choose who it is **For** 3: **Everyone**, **Parents** or **Staff only**.
4. Choose the **First day** 4, and the **Last day** if it lasts more than one day.
5. Untick **All day** to give **Starts at** and **Ends at** times.
6. Add **Where** and **Details** if you like.
7. To remind parents, tick **Remind parents by message before it** and type how many days before 5 (1 to 60).
8. Press **Add to the calendar** 6.

The calendar opens on the entry's month. To change an entry, open it and press **Edit**, change it, then press **Save the entry**. **Remove** takes it off the calendar after asking.

The rules:

- An entry cannot end before it starts, and lasts at most a year.
- Give both times or neither: an entry without times is all day.
- Only an entry for **Everyone** or **Parents** can remind parents.
- A **Visiting day** is one day, for **Parents** or **Everyone**. Its **Details** box becomes **Rules for visitors**, which parents read when they book, and you can tick **Only parents of boarders may book**. Then set its visiting times under **Visiting days** (see Visiting days). Once families have booked, it stays a visiting day and cannot be removed until their bookings are cancelled.

Reminding parents

An entry with a reminder sends one message to each parent of an active student (for a visiting day only for boarders, to parents of boarders), the number of days before that you set, at the time of day chosen on the Reminders tab. It is paid from the SMS wallet; parents with the School Dynamics app may get it as a free app notification instead.

The reminder goes only when **Calendar reminders** is switched on under **Settings › Messaging**, tab **Reminders**, where the coming reminders are listed with their cost. Like every automatic message, it starts off. See Automatic messages and templates.

Put the calendar on a phone

Press **Subscribe** on the calendar page.

- **Your own calendar**: press **Make my calendar address**. Copy the address into your phone's calendar app, or press **Open in my calendar app**. It holds everything on the school calendar, with your timetable lessons and invigilation duties. Keep the address to yourself. **New address** stops the old one working.
- **The school's calendar for parents**: those who keep the calendar press **Make the school's address**. It holds the terms, holidays, exam weeks, visiting days and everything meant for parents. Share it on the school's website or in a parents' group. **New address** replaces it; **Switch off** stops it.

Phones subscribed to the calendar pick up changes the next time they refresh.

> GOOD TO KNOW
>
> Parents also see the next three months of the calendar on their own page, with the entries for everyone and for parents.

QUESTIONS

Why can I not change the term dates here?
Terms come from **Academic years**. Change them there, and the calendar follows.

I set a reminder on an entry, but no text went. Why?
Check that **Calendar reminders** is switched on under **Settings › Messaging › Reminders**, and that the wallet covers it. Reminders also need School Dynamics to have switched on scheduled sending for your school.

Can parents see the calendar?
Yes. The parents' pages show the next three months of entries for everyone and for parents, with the terms. You can also share the school's calendar address with them.

Can I remove a visiting day that families have booked?
Not until their bookings are cancelled, so they can be told. Cancel them under **Visiting days** first.

11

Staff

Staff and their accounts, roles, leave, duty rosters, monitoring, payroll and payslips.

The people who run the school: their accounts and roles (which decide what each person sees), leave and duty rosters, staff monitoring, and paying staff.

Staff and their sign-in accounts	4 min
Roles and permissions	3 min
Leave	4 min
The duty roster	3 min
Staff monitoring	3 min
Payroll	5 min
My payslips	1 min

Staff and their sign-in accounts

Find a member of staff, add a new one with their sign-in name and roles, change their details, set a new password, or deactivate someone who left.

For: School administrator, Head teacher · app.schooldynamics.ug/help/staff/staff-and-accounts

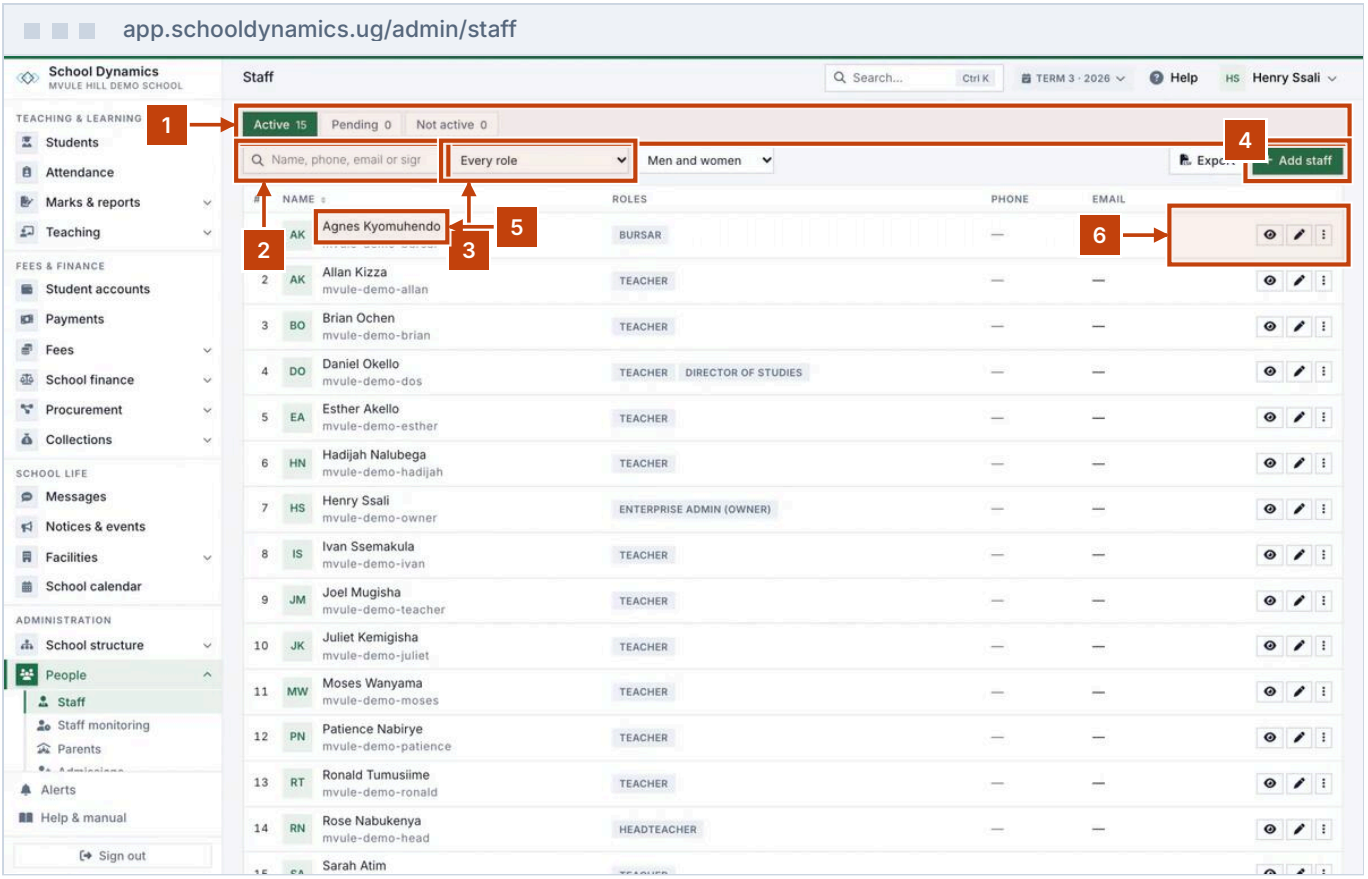
Staff lists everyone who works at the school, with their roles and contacts. From here the school administrator adds new staff, gives each one a sign-in name and password, changes their details, and deactivates those who leave.

Before you start

- The school administrator, the head teacher, the deputy, the director of studies and the bursar can see the list.
- Adding staff, changing their details, roles and passwords, and deactivating them is for the school administrator and the school's owner.

The staff list

Open **People › Staff**.



The demo school · invented names and figures

1 Active, Pending and Not active staff, with how many.

2 Find someone by name, phone, email or sign-in name.

3 Show one role only.

4 Add a member of staff.

5 Click a name for the quick view: roles, contacts and what they teach.

6 Edit, and More: roles, a new password, two-step sign-in, deactivate.

- The tabs 1 show **Active**, **Pending** and **Not active** staff, each with how many.
- Search 2 by name, phone number, email or sign-in name. Choose a role 3, or men or women.
- **Export** downloads the list shown as a spreadsheet. ID and bank numbers are in it only for those who manage staff.
- **Add staff** 4 adds a new member of staff.
- Click a name 5 for the quick view: their roles, phone, email, date of birth, supervisor, the classes and streams they lead, the subjects they teach this year, their highest study and emergency contact, and their signature. Those who manage staff also see the NIN, TIN, NSSF and bank numbers. **Lessons monitored** opens their staff monitoring record.
- The buttons at the end of a row 6: the pencil to edit, and **More** for the rest.

Add a member of staff

1. Press **Add staff**.
2. On **Bio & contacts**, type the **First name** and **Last name**, choose the **Sex**, and type the **Mobile number**. Add the other details you have.
3. Fill in **Personal**, **Education** and **ID & bank** now or later. The bank details are used for payroll.
4. On **Sign-in & photo**, type a **Sign-in name**, or leave it blank to use their email or phone number.
5. Type a **Password** of at least 4 characters, or leave it blank and set it later.
6. Add a **Photo** and a **Signature** (for documents they sign) if you have them.
7. Tick their **Roles**. **Teacher** is ticked for you. See Roles and permissions.
8. Press **Add to staff**.

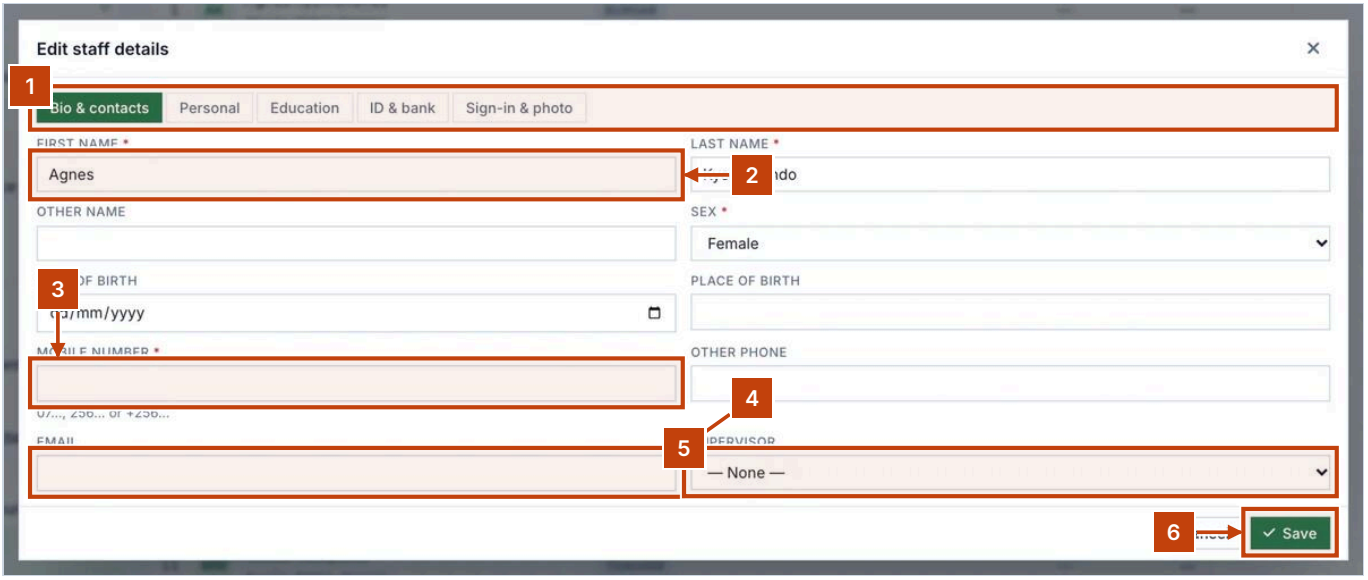
A note says, for example, *Juliet Kemigisha added. They sign in as …*, with their sign-in name. Tell them their sign-in name and password; nothing is sent to them. They then sign in as in Signing in.

The form refuses, with a sentence saying why, when:

- the first or last name, the sex or the mobile number is missing (*Enter a valid mobile number, e.g. 0772 123456.*);
- the email is already someone else's (*The email … is already used by someone else.*);
- no role is ticked (*Give at least one role (e.g. Teacher).*).

Change someone's details

Press the pencil on their row, or **Edit** in their quick view.



The demo school · invented names and figures

1 The details, in five tabs.

2 First and last name, sex and a mobile number are needed.

3 Mobile number: 07..., 256... or +256...

4 Email: no two people can share one.

5 Their supervisor, if they have one.

6 Save.

The same form opens, with its five tabs 1. Change what you need: the name 2, the mobile number 3, the email 4, the supervisor 5, or anything on the other tabs, then press **Save** 6. A new photo or signature replaces the old one. If nothing was changed, the note says *Nothing changed.*

Roles and passwords are not changed on this form: use the **More** menu.

The More menu

Choose	What happens
Roles	Tick or untick their roles. See Roles and permissions.
Set a new password	Type the new password twice (at least 4 characters) and press **Set password**. Nothing is sent: tell them in person. Their other browsers and phones ask them to sign in again with it.
Reset two-step sign-in	For someone who lost their phone and their recovery codes. They sign in with the password alone until they set two-step sign-in up again from **My profile**.
Deactivate	They can no longer sign in, and they leave the active list. Their records stay.
Activate	For someone not active: they can sign in again.

> ⚠ **CAREFUL**
>
> Some changes are refused to keep the school from locking itself out: you cannot deactivate yourself, the school's owner always stays active, and the school must keep at least one active administrator (*The school would have no active administrator. Make someone else an administrator first.*).

Good to know

- Every member of staff has their own sign-in. Never share one account between two people: the audit log records who did what.
- A teacher's classes and subjects are set on the classes and subjects pages, not here. The quick view only shows them.

QUESTIONS

A teacher forgot their password. What do I do?
Open the row's **More** menu and choose **Set a new password**. Nothing is sent: tell them the new password in person.

A teacher left the school. Should I delete them?
No. Choose **Deactivate** in the row's **More** menu. They can no longer sign in, and their records (marks, roll-calls, payments they took) stay. You can activate them again later.

Where do I say which subjects a teacher teaches?
On the class's subjects, under **Subjects**. The staff quick view then lists them. See Subjects.

Can two people share an email address or a phone number as their sign-in name?
No. A sign-in name and an email address belong to one person only, across the whole system.

Roles and permissions

Give each member of staff the roles that fit their job, and see what each role lets a person see and change.

For: School administrator, School owner · app.schooldynamics.ug/help/staff/roles-and-permissions

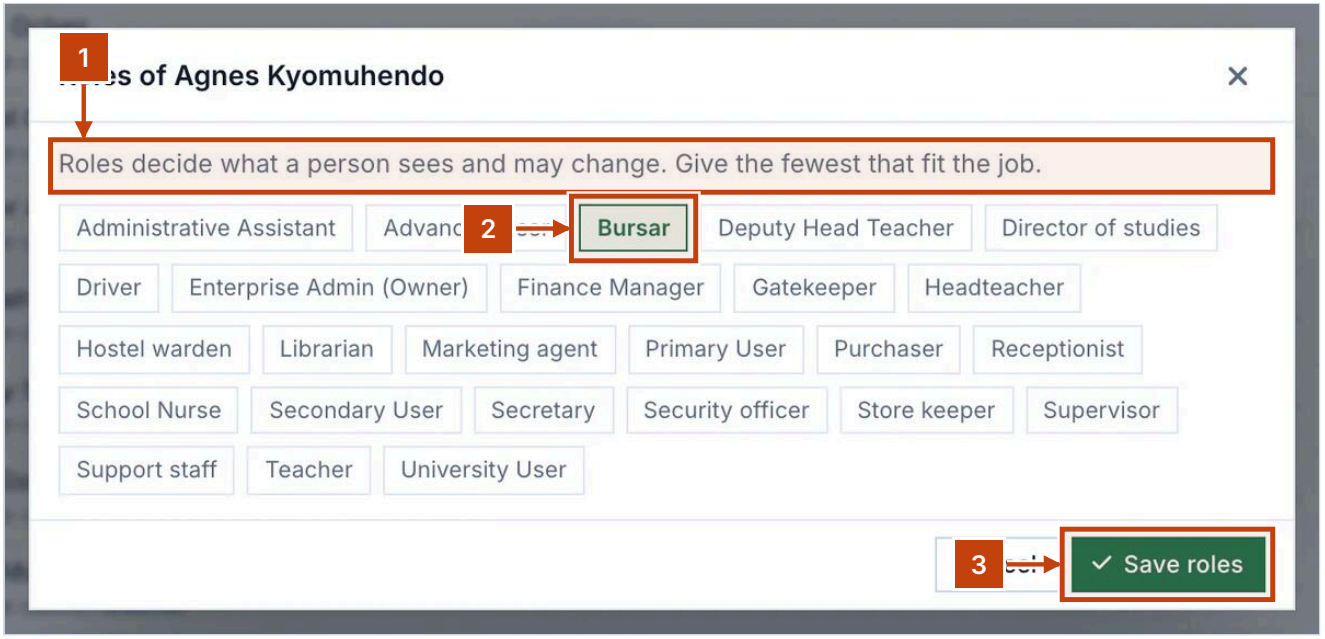
A role says what a member of staff is in the school: teacher, bursar, director of studies and so on. Roles decide which menu items a person sees and what they may change. Give each person the fewest roles that fit their job.

Before you start

Giving roles is for the school administrator and the school's owner.

Give or change someone's roles

1. Open **People › Staff**.
2. Click the person's name, then press **Roles** in their quick view (or choose **Roles** in the row's **More** menu).
3. Tick the roles they need, and untick those they no longer need.
4. Press **Save roles**.



The demo school · invented names and figures

1. Give the fewest roles that fit the job.
2. A ticked role. Click a role to tick or untick it.
3. Save roles. The change is written in the audit log.

The dialog says it plainly 1. Each role is a button that is ticked or not 2. **Save roles** 3 keeps the change, and the audit log records the person's new roles and who changed them (see The audit log).

A new member of staff gets their roles when they are added: **Teacher** is ticked for you on the form.

> ⚠ CAREFUL
>
> Three changes are refused, so the school cannot lock itself out:
>
> - *You cannot remove your own administrator role. Ask another administrator.*
> - *The school owner keeps the administrator role.*
> - *The school would have no active administrator. Make someone else an administrator first.*

What each role can do

Every member of staff, whatever their roles, can read the school profile, the notices and the school calendar; ask for things to be bought; ask for leave and read their own payslips; clock in and read the duty roster; and see their alerts. A role adds to that. A person with several roles can do everything each of them allows.

The roles below carry the names shown in the dialog.

Role	What it adds
Enterprise Admin (Owner)	The school administrator: everything in the school, including its settings, staff and roles, and payroll.
Headteacher	Students, classes, marks and report cards, results analysis; roll-calls and discipline; reviewing schemes of work and lesson plans; fees and finance to look at, not change; messages, notices and the calendar; the exam timetable and visiting days; approving purchases, leave and payroll; the duty roster, staff monitoring and staff attendance; the audit log; documents, record requests, requirements, alerts settings and account deletions.
Deputy Head Teacher	As the head teacher, except payroll, the alerts settings and account deletions.
Director of studies	Classes and subjects (and changing them), students (adding and changing), marks, report cards and results analysis; roll-calls and discipline; reviewing schemes of work and lesson plans; messages, notices and the calendar; the exam timetable; the duty roster and staff monitoring; hostels; the staff list.
Teacher	Classes and students to look at; marks for their own subjects; roll-calls; discipline records; sharing learning resources for their subjects; the night roll-call where they are the matron or patron.
Secretary	Students (adding and changing); messages, notices and the calendar; documents and ID cards; visiting days; correcting staff attendance; parents' record requests and consent records.
Bursar	Fees and finance (recording and changing; only the bursar deletes); messages; stores and procurement; transport; payroll (preparing and paying); requirements; the canteen; the online payment keys; the staff list.
Finance Manager	Fees and finance (recording and changing); procurement; requirements; the canteen.
Store keeper	Stores, receiving goods, requirements (to look at), the canteen.
Purchaser	Stores, buying (procurement) and receiving goods.
Hostel warden	Hostels, roll-calls and the night roll-call, visiting days.
School Nurse	The sick bay; students to look at.
Librarian	The library.
Receptionist	Visitors; students to look at; visiting-day bookings.

Role	What it adds
Security officer, **Gatekeeper**	Visitors and visiting-day bookings.
Driver	Transport.

Administrative Assistant, **Supervisor**, **Marketing agent**, **Support staff** and the older **Advanced User**, **Primary User**, **Secondary User** and **University User** roles add nothing to what every member of staff can do.

For the same rules seen from each job, see Who can do what.

Good to know

- The school's owner can do everything in the school, whatever roles they hold.
- Some pages check more than the role. A teacher enters marks only for the subjects they teach, and nobody approves their own leave.
- Salaries are private: only the school administrator, the head teacher and the bursar see payroll. Everyone else sees only their own payslips.

QUESTIONS

A teacher cannot see a page they need. What do I do?
Check which role the page needs in the table below, and add that role to the teacher. They see the new pages the next time a page loads.

Can one person hold two roles?
Yes. A director of studies who also teaches holds both **Director of studies** and **Teacher**, and can do everything either role allows.

Why can I not take the administrator role from someone?
Three rules: you cannot remove your own administrator role, the school's owner keeps it, and the school must keep at least one active administrator.

Who can do everything?
The school's owner, whatever roles they hold, and anyone with the administrator role (**Enterprise Admin (Owner)**).

Leave

Ask for leave and follow the decision, approve or decline requests, see who is away, and keep each person's leave balance.

For: Everyone, Head teacher, School administrator · app.schooldynamics.ug/help/staff/leave

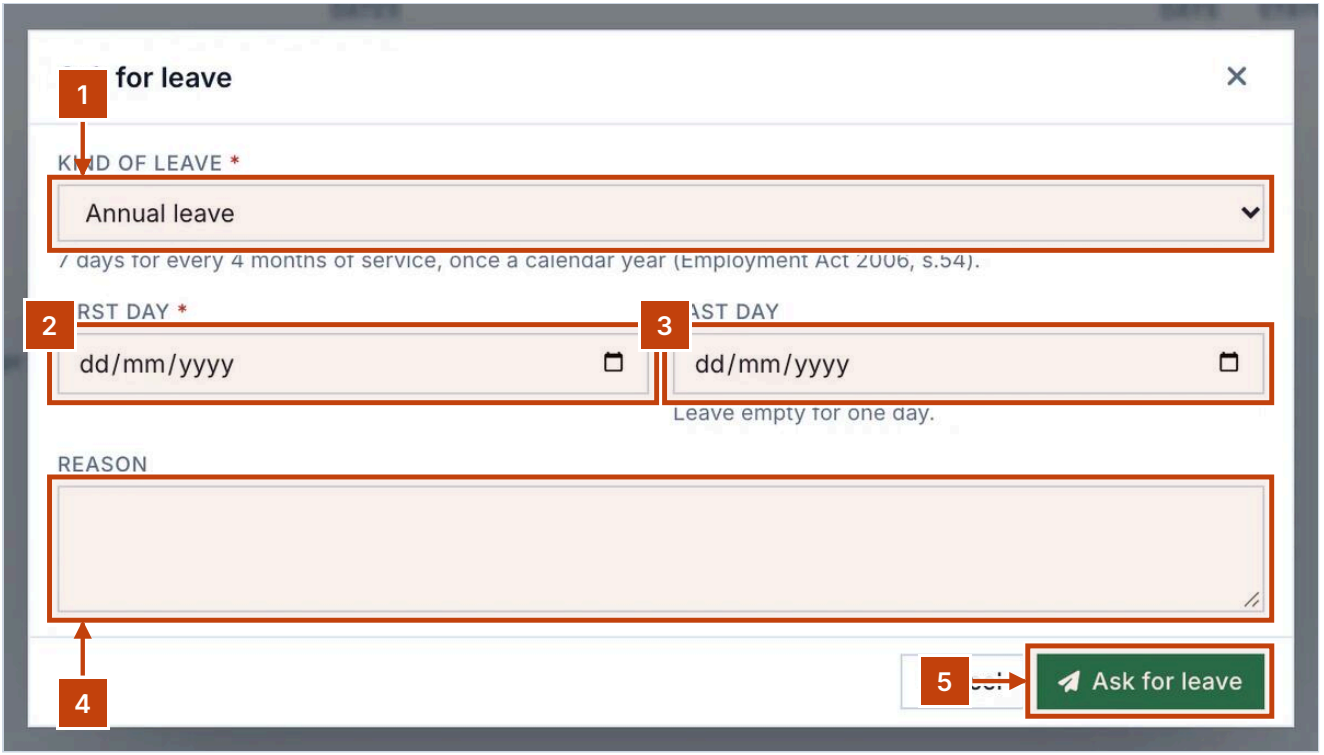
Every member of staff asks for leave here and follows the decision. The head teacher, the deputy or the school administrator approves or declines it. Leave is counted in working days, and each kind has its yearly leave allowance.

Before you start

- Everyone on the staff can ask for leave and see their own requests.
- Approving, declining and recording leave for someone else is for the head teacher, the deputy and the school administrator.
- Those who see the staff list (the head teacher, deputy, director of studies, bursar and administrator) see everyone's leave, **Who is away** and **Balances**.

Ask for leave

Open **People › Leave**. The top of the page shows how many days you have left this year. Press **Ask for leave**.



The demo school · invented names and figures

1 The kind of leave. The note under it says what the law allows.

2 The first day.

3 The last day. Leave it empty for one day.

4 Why (if you want to say).

5 Ask for leave. The head teacher, deputy or administrator decides it.

1. Choose the **Kind of leave** 1.
2. Choose the **First day** 2 and the **Last day** 3. Leave the last day empty for one day.
3. Read the line under the dates: how many working days it is, and how many you have left.
4. Type the **Reason** 4 if you want to.
5. Press **Ask for leave** 5.

Your request shows as **Waiting** until it is decided. When it is approved or declined, the list says so, with any note from the person who decided it.

The kinds of leave, as the school starts with them:

Kind	Allowance a year	Pay
Annual leave	21 working days (7 for every 4 months of service)	Full pay
Sick leave	No yearly limit: each request is decided	Full pay for the first month away; a medical certificate may be asked for
Maternity leave	60 working days, for women	Full pay
Paternity leave	4 working days, for men	Full pay
Compassionate leave	No yearly limit unless the school sets one	Full pay
Study leave	No yearly limit unless the school sets one	Full pay
Unpaid leave	No yearly limit	Unpaid

The request is refused, with a sentence saying why, when:

- the dates are all days off (*Those dates are all days off (weekends or public holidays). Choose working days.*);
- it crosses 31 December (*Leave is counted per calendar year. Split leave that crosses 31 December into two requests.*);
- it overlaps another request of yours that is waiting or approved;
- it asks for more than is left. Requests still waiting count too, so two requests cannot both pass the limit;
- it is more than 120 working days (split it into parts).

To take back a request that is still waiting, open it and press **Cancel leave**. The days are given back.

Approve or decline leave

Requests waiting for a decision come first in the list, and **Waiting for a decision** counts them.

1. Open the request (click its kind of leave), or use the tick or cross on its row.
2. Read it: the working days, what the person has left of that kind this year, whether it is paid, and the reason.
3. Press **Approve** or **Decline**.
4. Type a **Note**. When you decline, say **Why it is declined**: the person will read it.
5. Press **Approve leave** or **Decline leave**.

If the person is on the duty roster while away, the request and the approve dialog list those duties. Approving keeps the duty: the roster then marks the clash so a replacement can be found (see Duty roster).

Nobody decides their own leave: *Someone else decides your own leave.* The school's owner is the only exception.

An approver can also cancel leave that is waiting or already approved: open it and press **Cancel leave**.

Record leave for someone

When someone could not ask in advance (sick leave, for example):

1. Press **Ask for or record leave**.
2. Choose **Who**.
3. Fill in the kind, the dates and the reason.
4. Keep **Already agreed: record it as approved** ticked.
5. Press **Record leave**.

It is approved at once, in your name. Untick the box to put it in as a request waiting for a decision instead.

Who is away

The **Who is away** tab shows a month of approved leave, day by day. Requests still waiting show with a dashed edge; untick **Show requests still waiting** to hide them. Weekends, days the school does not work and public holidays are greyed. Under the month, a list shows everyone away that month.

Balances and allowances

The **Balances** tab shows each active member of staff and the approved days of each kind of leave they took in the year, against the allowance. A figure above the allowance is marked in red. **Waiting** shows days still waiting for a decision. Choose another year at the top. **Spreadsheet** downloads the table.

To change the allowances, the head teacher, the deputy or the administrator presses **Allowances**, types the working days a year for each kind, and presses **Save allowances**. Leave a box empty for no yearly limit. Annual, maternity and paternity leave always need a number, and it cannot be below the law: 21, 60 and 4 days.

Good to know

- A working day is a day of the school's working week, less Uganda's public holidays. The Eid holidays change each year and are not left out: the approver adjusts a request that spans one.
- Approved unpaid leave is taken off the month's payslip by itself (see Payroll).
- Every request, decision and cancellation is recorded with who did it.

QUESTIONS

How many days of annual leave does each member of staff get?
21 working days a year unless the school gives more, as the Employment Act 2006 sets. The head teacher can raise it under **Balances**, **Allowances**, but never below the law.

My leave crosses New Year. Why is it refused?
Leave is counted per calendar year. Ask for it in two parts: up to 31 December, and from 1 January.

Can I approve my own leave?
No. Someone else decides it. Only the school's owner, who has nobody above them, may.

I am sick and could not ask in advance.
The head teacher, the deputy or the school administrator can record the sick leave for you afterwards. It is approved at once.

Does unpaid leave come off the salary?
Yes. Approved unpaid leave in a month is taken off that month's payslip by itself.

The duty roster

See who is on duty each week of the term, put staff on a duty or fill a whole duty by turns, and print the roster.

For: Head teacher, Director of studies, Everyone · app.schooldynamics.ug/help/staff/duty-roster

The duty roster shows who is on which duty in each week of the term: teacher on duty, the gate, meals, a dormitory, and any duty your school names. Everyone on the staff can read it. The head teacher, the deputy, the director of studies and the school administrator build it.

Before you start

- The term needs its start and end dates (under **Academic years**), so its weeks are known. See Academic years and terms.
- Building the roster is for the head teacher, the deputy, the director of studies and the school administrator.

Read the roster

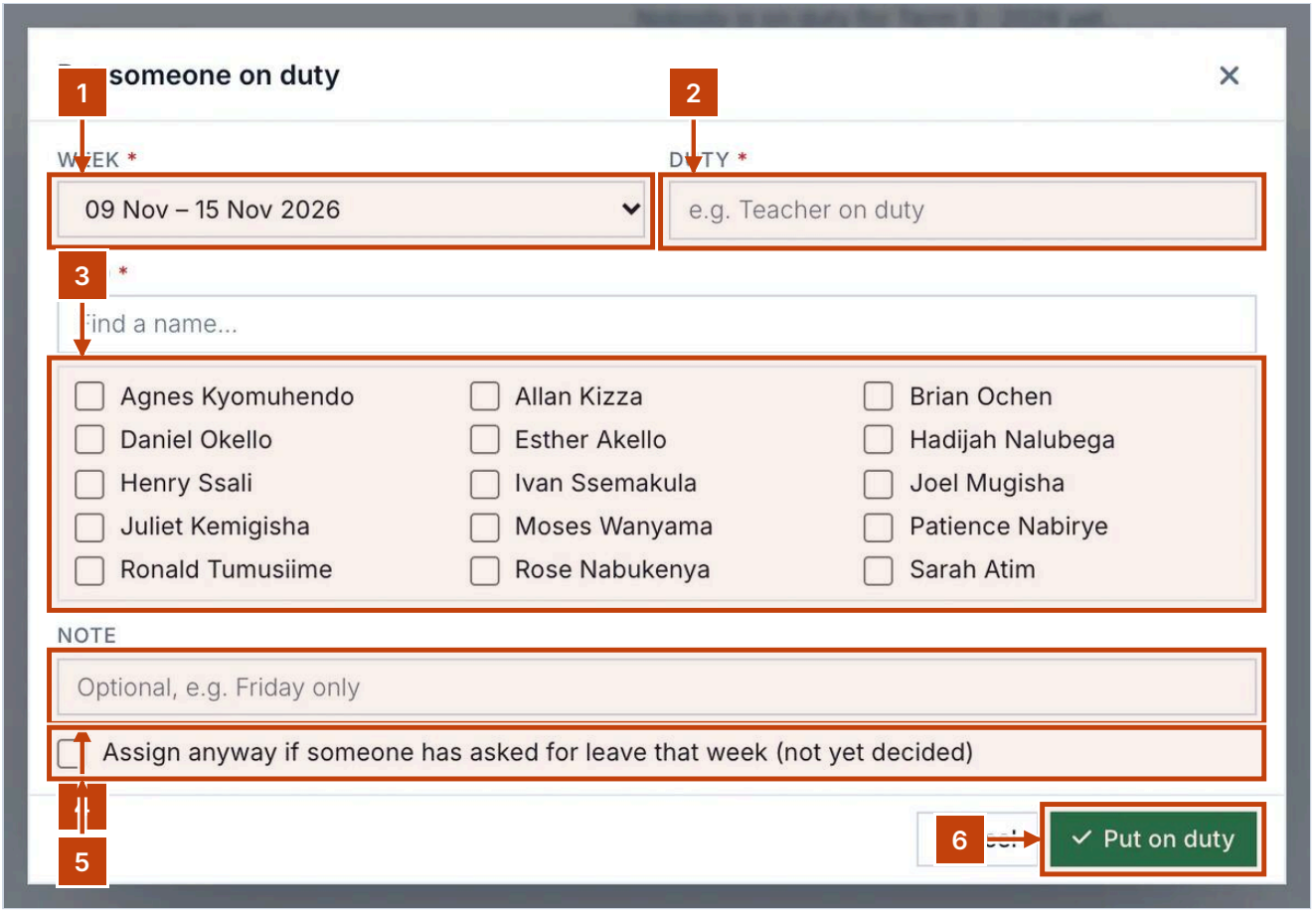
Open **People › Duty roster**. It opens on the active term; choose another term at the top.

- **Your next duties** at the top lists yours.
- Each row is a week (Monday to Sunday), and each column a duty. This week is shaded.
- Your own name is marked. A name with a warning sign is someone who is on leave that week: hover it to see the leave.
- **PDF** opens the term's roster to print or share.

When nobody is on duty yet, the page says so.

Put someone on duty

Press **Put someone on duty**, or the small + in a cell to start on that week and duty.



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1	The week: Monday to Sunday.	2	The duty. Pick one or type your own.
3	Who. Type to find a name, then tick.	4	A note, for example Friday only.
5	Put them on even if they asked for leave that week.	6	Put on duty.

1. Choose the **Week** 1.
2. Choose or type the **Duty** 2: **Teacher on duty**, **Dormitory (boys)**, **Dormitory (girls)**, **Gate**, **Meals**, **Assembly**, **Games**, **Prep**, a duty used before, or a new one.
3. Tick **Who** 3. Type in the box to find a name.
4. Add a **Note** 4 if you like.
5. Press **Put on duty** 6.

The roster refuses, with a sentence saying why, when:

- the person is on approved leave that week (*... is on annual leave ... Choose someone else.*);
- the person has asked for leave that week and it is not yet decided. Tick **Assign anyway if someone has asked for leave that week (not yet decided)** 5 to put them on all the same, since the leave may still be declined;
- the person is already on that duty that week;

- the week is outside the term's dates.

To take someone off, press the small × beside their name and confirm.

Fill a duty by turns

For a duty that rotates through the term, let the roster share it out:

1. Press **Fill by turns** (or the round-arrow button beside a duty's name).
2. Choose or type the **Duty**.
3. Choose **People a week**.
4. Tick **Who**, in the order they should take their turns.
5. Press **Fill the empty weeks**.

The people you ticked take the duty in turn, week after week, for every week of the term that has nobody on that duty yet. Anyone on leave, or waiting for leave, that week is skipped. A note says how many turns were given and who was skipped. Weeks that already had someone are left as they are.

When leave is approved later

Approving leave never removes a duty. The person's name stays on the roster with a warning sign, so you can see the clash and find a replacement: take them off that week and put someone else on. The person approving the leave sees the duties too, before deciding. See Leave.

> **GOOD TO KNOW**
>
> Every change to the roster is recorded with who made it.

QUESTIONS

Can two people share a duty in the same week?
Yes. Tick both when you put them on duty, or set **People a week** to 2 when you fill it by turns. One person cannot be on the same duty twice in a week.

Someone was approved for leave after the roster was made. What happens to their duty?
It stays, marked with a warning sign. Take them off and put someone else on for that week.

Why does Fill by turns refuse to run?
The term needs its start and end dates, so its weeks are known. Set them under **Academic years**.

Where do I see my own duties?
At the top of the page: **Your next duties**. Your name is also marked in the roster.

Staff monitoring

Record the lessons class monitors and the director of studies watched, follow the trends on the dashboard, and print a report for a teacher, subject, class or term.

For: Director of studies, Head teacher, School administrator · app.schooldynamics.ug/help/staff/staff-monitoring

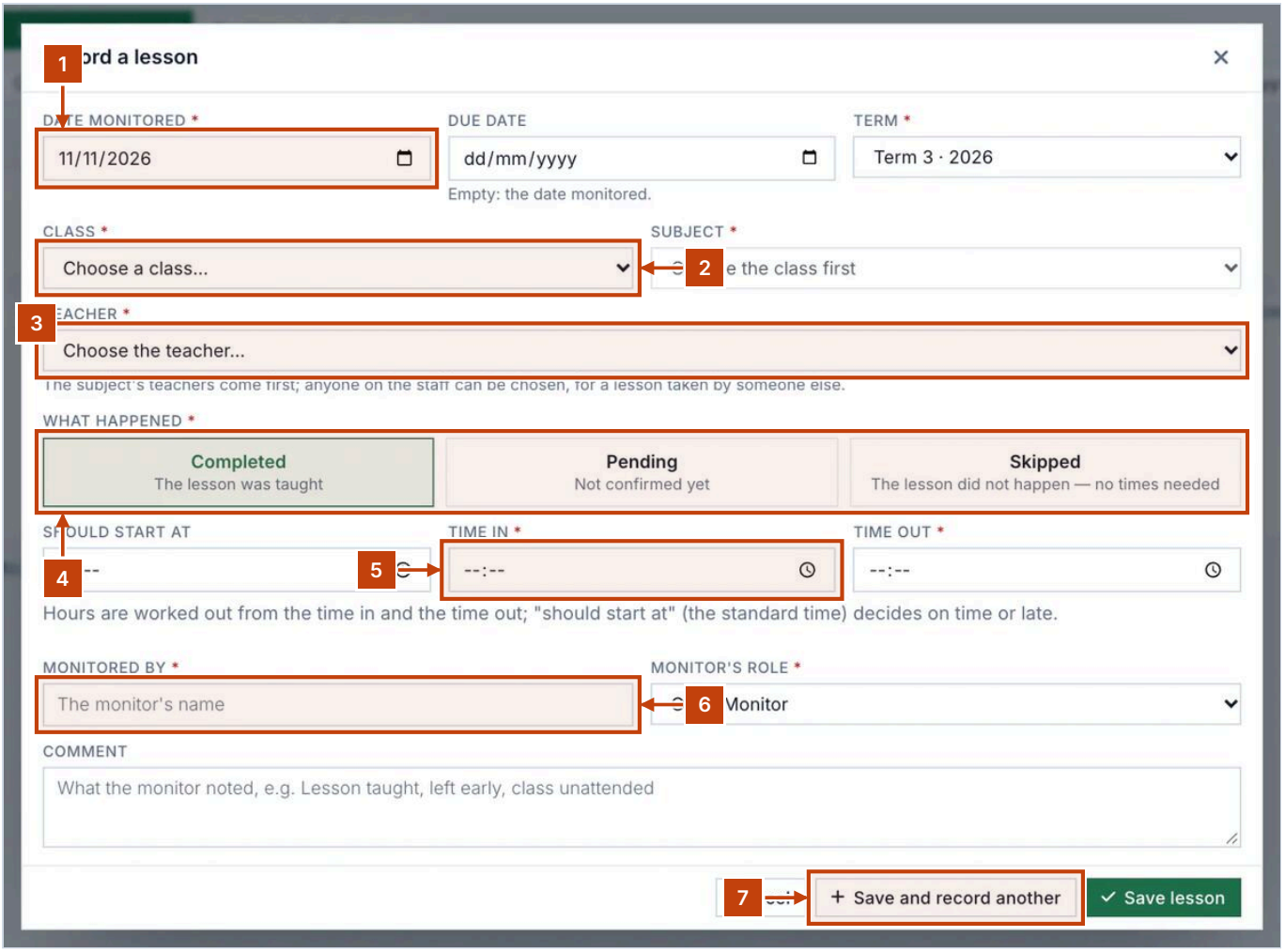
Staff monitoring keeps the sheets that class monitors and the director of studies fill in: which lessons were taught, when the teacher came in and left, and what the monitor noted. The dashboard shows the trends, and reports gather the evidence for one teacher, a subject, a class or a term.

Before you start

- Reading the records, the dashboard and the reports is for the school administrator, the head teacher, the deputy, the director of studies and the bursar.
- Recording, changing and deleting them is for the school administrator, the head teacher, the deputy and the director of studies.
- Teachers do not see these records, not even their own.

Record a lesson

Open **People › Staff monitoring** and press **Record a lesson**.



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1. The day the lesson was watched.
2. The class, then the subject.
3. The teacher. The subject's teachers come first.
4. What happened: Completed, Pending or Skipped.
5. Time in and time out. With Should start at, on time or late is worked out.
6. Who watched the lesson, and their role.
7. Save and record another: the day, class and monitor stay for the next line.

1. Choose the **Date monitored** 1. Add a **Due date** if it differs (empty means the date monitored), and check the **Term**.
2. Choose the **Class**, then the **Subject** 2.
3. Choose the **Teacher** 3. Picking a subject suggests its teacher. Anyone on the staff can be chosen, for a lesson taken by someone else.
4. Choose **What happened** 4: **Completed** (the lesson was taught), **Pending** (not confirmed yet) or **Skipped** (the lesson did not happen).
5. Type **Should start at**, **Time in** and **Time out** 5. A skipped lesson needs no times. The line under the times shows how long the lesson was and whether it started on time.
6. Type who it was **Monitored by** and choose the **Monitor's role** 6: **Class Monitor**, **DOS** or **Other**. Add a **Comment** if the monitor wrote one.
7. Press **Save lesson**, or **Save and record another** 7 to go on with the same sheet.

The dialog refuses, with a sentence saying why, when a needed field is missing, when the class is of another year than the term, when the subject is not one of the class's, or when *Time out cannot be earlier than time in.*

The lessons monitored

The first tab, **Lessons monitored**, lists every lesson recorded, newest first. Search a teacher, monitor or comment, or choose a teacher, term, class, subject, status or dates. The figures above the list count the lessons shown: **Lessons monitored**, **Hours taught**, **Completed**, **Skipped** and **On time**.

- Click a lesson for its record: times, how long it was taught, punctuality, the monitor, the comment, and who entered it. **Edit** changes it; **Delete** removes it from every report, after asking.
- Click a teacher's name to see that teacher's lessons alone. The **Lessons monitored** button in a staff member's quick view opens the same page.
- **Excel** downloads the lessons shown.

The dashboard

The **Dashboard** tab sums up the lessons recorded, for every term or for one: how many this week and this month, the hours taught, the **Completion rate**, the **Coverage** (lessons with a time in and out), **On time**, and how many teachers were monitored. It also shows the lessons by status, the last seven days, the teachers, subjects and classes monitored most, and the latest records. Click **Lessons monitored**, **This week** or **This month** to open those lessons.

Reports

The **Reports** tab keeps named reports you can open again, each with its reference (for example *EMT-00012*).

1. Press **New report**.
2. Choose the **Kind of report**: **Individual teacher** (needs a teacher), **Subject-wise** (needs a class and one of its subjects), **Class-wise** (needs a class) or **Term trend** (needs a term, or both dates).
3. Type a **Name** you will know it by, for example *Mr Okello, Term 2*.
4. Narrow it with the **Term**, **Class**, **Subject**, **Teacher**, **From** and **To**. Leave both dates empty to cover the whole term.
5. Press **Save and open**.

The report opens over the list: its figures, a table **By teacher**, and a breakdown by subject, class or month. **Excel** and **PDF** download it. **Every lesson** opens the report's own page, with every lesson it covers and **Download PDF**. **Change** edits the name or filters; **Delete** removes the report but not its lessons.

QUESTIONS

Can teachers see their own monitoring records?
No. The records are confidential: only the school's leaders, the director of studies and the bursar can read them.

How is "late" worked out?
From **Should start at** and **Time in**. A lesson with no **Should start at** time counts neither as on time nor as late.

A monitor's sheet has twenty lessons. Do I open the dialog twenty times?
No. Press **Save and record another** after each line: the day, class and monitor stay filled in for the next one.

Does deleting a report delete its lessons?
No. A report only gathers lessons. Deleting it leaves every lesson in place.

Payroll

Set each person's salary, prepare the month's payroll with PAYE, NSSF and Local Service Tax worked out, have it approved, and record it as paid.

For: Bursar, Head teacher, School administrator · app.schooldynamics.ug/help/staff/payroll

The payroll pays staff once a month. The bursar sets each person's salary once. Each month the bursar prepares the payroll, the head teacher approves it, and the bursar records it as paid. PAYE, NSSF and Local Service Tax are worked out at Uganda's rates for that month, and the paid payroll goes into the school's spending by itself.

Before you start

- The school administrator, the head teacher and the bursar can see payroll. Nobody else sees anyone's salary.
- Setting salaries, preparing payrolls and recording them as paid is for the bursar and the school administrator. Approving is for the head teacher and the school administrator.
- The bank details of each member of staff are on their record under **People › Staff** (the **ID & bank** tab). See Staff and their sign-in accounts.

Set up payroll once

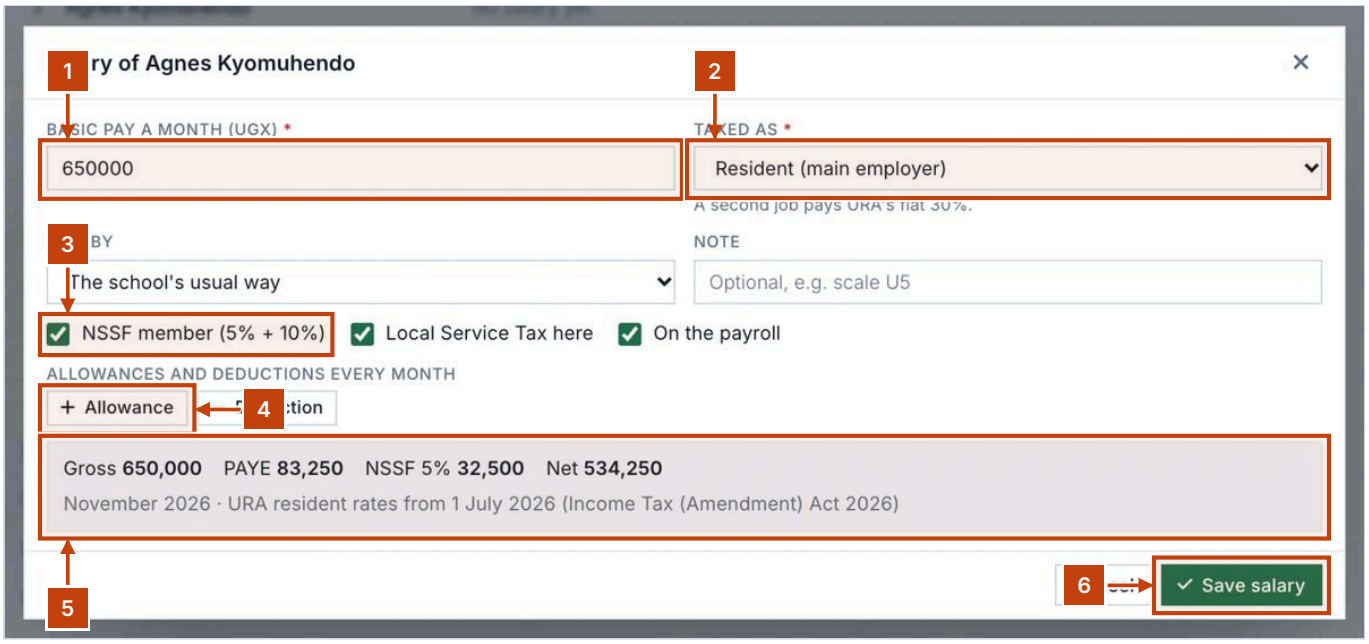
Open **People › Payroll** and press **Payroll settings**.

1. Choose where **Salaries are filed under**: an account of the school's chart of accounts, such as *Salaries*. Gross pay is entered there when a payroll is paid.
2. Choose where **Employer NSSF is filed under**, or leave it as the salaries account.
3. Choose how staff are **Usually paid by**: **Bank Transfer**, **Mobile Money**, **Cash**, **Cheque** or **Other**.
4. If PAYE, NSSF and LST are paid to the authorities later, tick **PAYE, NSSF and LST are paid later (owed until remitted)** and choose who they are **Owed to**, a supplier such as URA. They then show among what the school owes until paid.
5. Press **Save settings**.

Until the salaries account is chosen, the page reminds you, and no payroll can be recorded as paid. If the school has no chart of accounts yet, add an account such as *Salaries* first: see Budget and expenditure.

Set each person's salary

Open the **Salaries** tab. It lists every active member of staff with their basic pay, allowances, deductions, their net pay this month and how they are taxed. Choose **No salary yet** to find those still to set. Click a name.



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1. Basic pay a month, in shillings.
2. How they are taxed: main employer, non-resident, or a second job.
3. NSSF and Local Service Tax, and whether they are on the payroll.
4. Add an allowance or a deduction paid every month.
5. This month's pay as you type: gross, PAYE, NSSF, LST and net.
6. Save the salary.

1. Type the **Basic pay a month (UGX)** 1.
2. Choose how they are **Taxed as** 2: **Resident (main employer)**, **Non-resident**, or **Second job (flat 30%)**.
3. Untick **NSSF member (5% + 10%)** or **Local Service Tax here** 3 if they do not apply. Untick **On the payroll** to pause their pay.
4. Add what they get or give every month 4: press **Allowance** (housing, transport…) or **Deduction** (a SACCO saving, a loan), type its name and amount. An allowance is taxed unless you untick **Taxed**.
5. Read the figures 5: gross pay, PAYE, NSSF, LST, other deductions and net pay this month.
6. Press **Save salary** 6.

A change reaches the next payroll prepared, or a draft when it is refreshed. Payslips already approved never change.

How pay is worked out:

- **Gross pay** is the basic pay plus every allowance.
- **NSSF**: 5% of gross pay from the member of staff, and 10% on top from the school.
- **Local Service Tax** is taken in July to October, a quarter of the year's amount each month, by the band of the monthly gross pay.
- **PAYE** is worked out on gross pay, less allowances that are not taxed and less LST, by URA's table for that month (or a flat 30% for a second job).
- **Net pay** is gross pay less PAYE, NSSF, LST and the other deductions.

Prepare the month's payroll

1. On the **Payrolls** tab, press **New payroll**.
2. Check the **Month**. A payroll can be prepared at most one month ahead, and there is one payroll a month.
3. Press **Prepare payroll**.

The month's payroll opens as a **Draft**, with one payslip for each active member of staff with a salary. Approved unpaid leave in the month is taken off as *Unpaid leave*, by the days away.

Check each payslip. Click a name to open it:

- To add overtime, a bonus or a salary advance for this month only, use **Add for (month) only**: choose **Add to pay** or **Take off pay**, type what it is for and the amount, and press **Add**. Remove such a line with its ×.
- **Take off this payroll** leaves the person out this month; their salary stays.

At the top of the page:

- **Refresh** builds every payslip again from the salaries as they are now. Lines added for this month are kept.
- **Delete draft** deletes the draft and its payslips. Nothing has been paid and no salary changes.
- **Summary PDF** prints the month's payroll. **Bank list** downloads who to pay and how much, with their bank and account numbers, for the bank or a mobile money bulk payment.

Approve the payroll

The head teacher opens the month's payroll, checks it, and presses **Approve payroll**. A box asks to confirm the number of staff and the net pay.

The button cannot be pressed while a payslip has more deductions than pay (the page lists how many), or when nobody is on the payroll. Once approved, the payroll is frozen. To change it, press **Back to draft**, say **Why**, and it will need approving again.

Record it as paid

After paying the staff:

1. Open the month's payroll and press **Record as paid**.
2. Check **Paid on** (not in the future) and **Paid by**.
3. Choose the **Term the spending belongs to**.
4. Read what will be entered in the spending: the gross pay under the salaries account, and the employer NSSF.
5. Press **Record as paid**.

The payroll is now **Paid** and cannot be changed. The gross pay and the employer's NSSF are entered in the school's spending under the accounts you chose, like any other spending (see Recording spending). Each payslip is emailed to staff who have an email address; the page counts **Payslips emailed** and marks those with no email. **Email those not sent** tries again for those whose email failed.

> ⚠ CAREFUL
>
> Recording the payroll as paid enters the money in the school's books and cannot be undone. Record it only after the staff have been paid.

Good to know

- The payrolls list shows each month's staff, gross pay, PAYE, NSSF, net pay and status, with the last net pay and its cost to the school (gross pay plus the employer's NSSF).
- Every step (prepared, changed, approved, sent back, paid) is listed under **History** on the payroll's page, with who did it.

QUESTIONS

Who prepares and who approves the payroll?
The bursar prepares it and records it as paid. The head teacher approves it. The school administrator can do all three.

Can I change a payroll after it is approved?
Send it **Back to draft** with a reason, change it, and have it approved again. Once it is recorded as paid, it cannot be changed.

Where do overtime or a salary advance go?
In that month's payslip, while the payroll is a draft: open the payslip and use **Add for … only**. Regular allowances and deductions belong on the salary.

Do staff on unpaid leave get their full pay?
No. Approved unpaid leave in the month is taken off their payslip by itself, as *Unpaid leave*.

Do staff get their payslips?
Yes. When the payroll is recorded as paid, each payslip is emailed to staff who have an email address, and every member of staff can open theirs under **My payslips**.

My payslips

Every member of staff can read and download their own payslips, once the month's payroll has been paid.

For: Everyone · app.schooldynamics.ug/help/staff/payslips

My payslips shows your own payslips, month by month, once each month's payroll has been recorded as paid. You can read each one and download it as a PDF.

Open your payslips

Open **People › My payslips**.

At the top, the latest month: your **Net pay**, **Gross pay**, **PAYE**, and **To your NSSF** (your 5% and the school's 10%).

Below, one row for each month: **Gross**, **Deductions**, **Net pay** and the day it was **Paid on**.

1. Click the month, or the eye button.
2. Read the payslip: basic pay and each allowance; then PAYE (and the pay it was worked out on), your NSSF 5%, Local Service Tax when it applies, and any other deductions; and the school's NSSF 10%.
3. Press **PDF payslip** to download or print it. The PDF button on the row does the same.

Good to know

- A payslip shows here only after the bursar records the month's payroll as paid. Drafts and approved payrolls are not shown.
- When the payroll is paid, your payslip is also emailed to you, if your staff record has an email address. Ask the school administrator to add yours.
- PAYE, NSSF and Local Service Tax are worked out at Uganda's official rates for that month. See Payroll for how.
- Approved unpaid leave in a month is shown as a deduction, *Unpaid leave*. See Leave.
- Nobody else can open your payslips here. Those who run payroll read them on the payroll's own page.

QUESTIONS

This month's payslip is not there. Why?
Payslips show once the bursar has recorded the month's payroll as paid. Until then, the payroll is still being checked or approved.

My payslip looks wrong. Who do I ask?
The bursar. They prepare the payroll and can correct a payslip before it is approved.

Can anyone else see my payslip?
Only those who run payroll: the school administrator, the head teacher and the bursar. Other staff see only their own.

Did the school pay my NSSF?
Your payslip shows both: your 5% taken from your pay, and the school's 10% on top. **To your NSSF** at the top adds them up for the latest month.

12

Boarding and facilities

Hostels, night roll-calls, visiting days, the sick bay, transport, library, stores, fixed assets and visitors.

The parts of school life outside the classroom, each kept by the person who looks after it: the warden, the nurse, the librarian, the store keeper, the transport officer and the gate.

Hostels, rooms and beds	5 min
Take the night roll-call in a dormitory	4 min
Visiting days, time slots and bookings	4 min
Record sick-bay visits	4 min
School transport, routes, students and trips	7 min
Run the library	4 min
Keep the store	5 min
Keep the fixed-asset register	4 min
Sign visitors in and out	3 min

Hostels, rooms and beds

Set up the boarding buildings, their rooms and beds, then put each boarder in a bed, move them and check them out.

For: Warden, Director of studies, School administrator · app.schooldynamics.ug/help/facilities/hostels

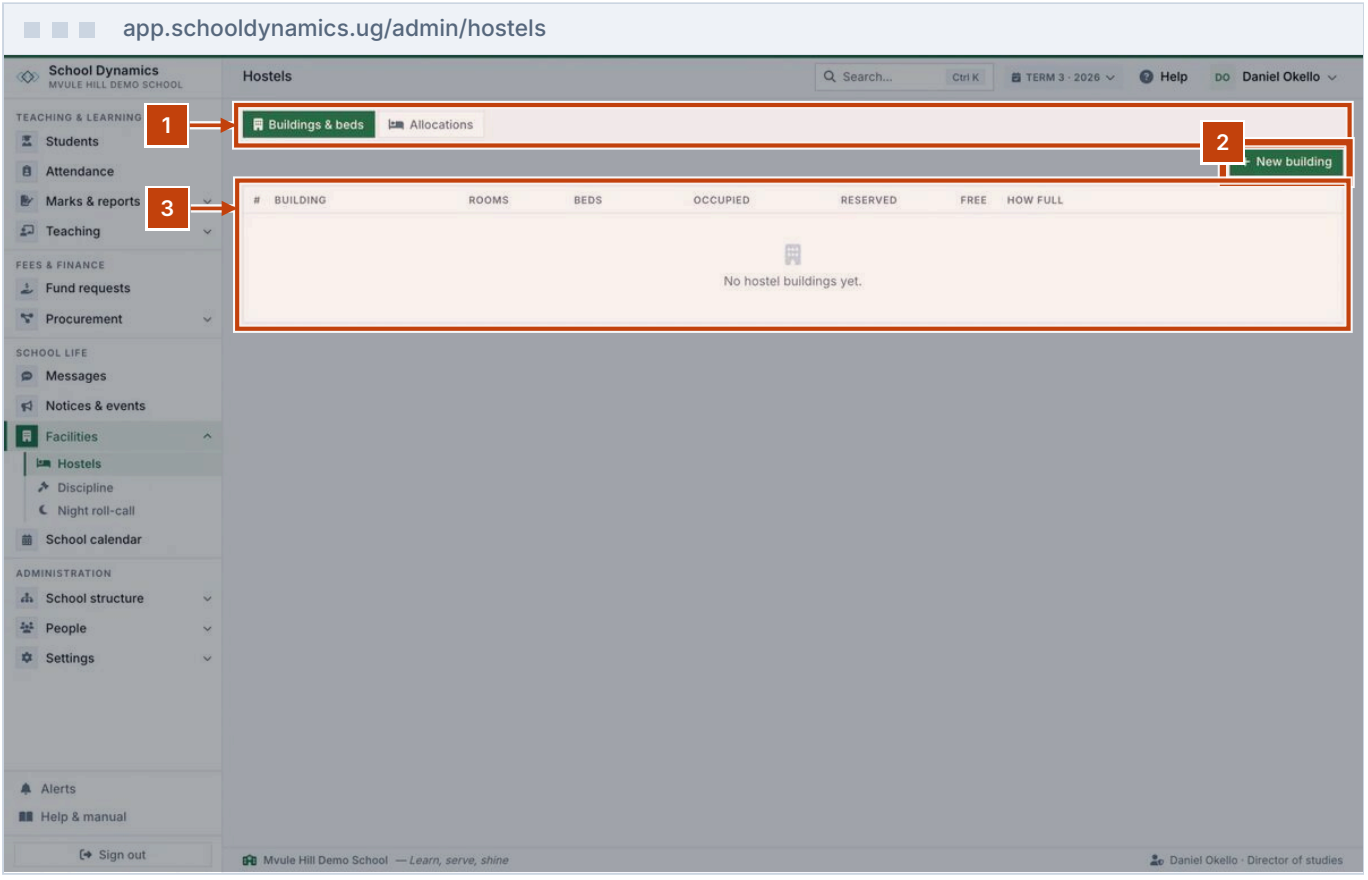
The **Hostels** pages hold the school's boarding buildings, the rooms in them, every bed, and which student holds each bed. The night roll-call takes its list of boarders from here, so keep it up to date as boarders come and go.

Open it from **School life › Facilities › Hostels**.

Before you start

- The warden, the director of studies and the school administrator can add buildings, rooms and beds and put students in them. Other staff who may see students can look at these pages, but cannot change anything.
- The school needs an active term, because every stay belongs to the term it was made in. Without one you see *Set the school's active term first: every stay belongs to a term.* Set it under › **Academic years**.

The hostels page



The demo school · invented names and figures

1 Two tabs: **Buildings & beds**, and **Allocations** (who is in which bed).

2 Add a hostel building.

3 Each building with its rooms, beds and how full it is. Click a name for a quick view.

The page has two tabs 1. **Buildings & beds** lists the buildings; **Allocations** lists the students in beds.

Once the school has beds, figures at the top count every bed in the school: **Beds**, **Occupied**, **Reserved** and **Free**.

New building 2 adds a building. The table 3 shows each building's rooms and beds, how many are occupied, reserved and free, and a **How full** bar. Click a building's name (or the eye) for a quick view of its rooms; **Beds and students** at the foot of the quick view opens the building's own page. The bed icon opens it directly.

Set up a building, its rooms and beds

1. Press **New building**.
2. Type the **Building name** (for example *Block A*). Add **Details** if you like (for example *Boys*).
3. Press **Add building**.
4. Open the building: press the bed icon beside it.
5. Press **New room**. Type the **Room name**, and in **Beds to add now** how many beds the room has (4 is filled in).
6. Press **Add room**. The beds are named Bed 1, Bed 2 and so on.
7. Repeat for every room.

A room's name must be new in its building, and a bed's name new in its room.

More beds, or a bed with its own name. Press **Beds** on the room. Either type **How many beds** (they are numbered on from the beds already there), or type one name in **Or one bed with this name** (for example *Upper 3*). Press **Add beds**. You can add up to 100 beds at a time.

Rename a bed. Under a room's beds, after **Rename a bed:**, click the bed's name, type the new one and press **Rename bed**.

On the building's page each room shows *3 of 8 beds taken*, and each bed is a tile: **Free**, or the name of the student who holds it with *Occupied* or *Reserved*.

Put a student in a bed

You can start in two places:

- On the building's page, click a free bed. The dialog opens with that bed chosen.
- On the **Allocations** tab, press **Put a student in a bed**, then choose a free bed in **Bed**. The free beds are grouped by room and building.

Then:

1. Under **Student**, type the student's name or reg no, and click them.
2. Choose the **Status**: *Occupied — the student sleeps here* or *Reserved — held for the student*.
3. Check **From** (today is filled in) and **Until** (the end of the active term).
4. Add **Remarks** if you need to.
5. Press **Put in bed**. The bed now shows the student.

The system refuses when:

- the bed is taken: *Bed 2 is already occupied by …*;
- the student already holds a bed: *This student already holds Bed 3 in Room 4. Check them out of it first.* (Or move them: see below.);
- **Until** is before **From**: *The end date cannot be before the start date.*

Change, move or check out a student

Click a taken bed on the building's page, or the pen beside a row on **Allocations**. The **Stay** opens with the student, the bed and the term.

- **Change the stay.** Change the **Status**, the dates or the **Remarks** and press **Save**. Choosing *Vacant — the student has left* ends the stay and frees the bed.
- **Move to another bed.** Open **Move to another bed**, choose the **New bed** and press **Move**. The student leaves the old bed today, and a new stay starts today in the new bed with the same status, end date and remarks.
- **Check out.** Press **Check out** and confirm. The stay ends today (or on its **Until** date, if that has already passed) and the bed is free.

Allocations: who is in which bed

The **Allocations** tab lists the stays. Search by student or reg no, and choose what to show:

Show	Lists
In a bed now	Students holding a bed (occupied or reserved). This is the default.
Stay ended, bed still held	Students whose **Until** date has passed but who still hold the bed.
Left	Stays that have ended.
Every stay	All of them.

You can also choose a term (or **Every term**) and a building. Each row shows the bed, room and building, the status, the dates, the term and the remarks.

Stays that have ended

When the **Until** date of a stay has passed and the student still holds the bed, the Hostels page warns: *3 students' stays have ended but still hold beds.* **See who** opens **Allocations** at *Stay ended, bed still held*.

Free those beds (or **Free all those beds** on Allocations) checks out every one of those students at once and frees their beds.

> ⚠ CAREFUL
>
> **Free those beds** checks out every student whose stay has ended, not just one. If some of them are staying on next term, open their stays first and move their **Until** date.

Good to know

- Nothing here is deleted: buildings, rooms, beds and stays stay as the record.
- A student holds one bed at a time, and a reserved bed counts as taken.
- A stay is filed under the term that was active when it was made. It is not renewed each term: the student keeps the bed until checked out.
- The night roll-call of a dormitory lists the students holding an **occupied** bed in that building. Reserved beds are not on it.

QUESTIONS

Can I delete a building, a room or a bed?
No. Nothing in the hostels is ever deleted, so the record of who slept where stays. Rename a room or a bed instead, and check students out when they leave.

A boarder is changing dormitory. Do I check them out first?
No. Open their stay and use **Move to another bed**. The old bed is freed and a new stay starts today in the new bed.

Why does a reserved bed count as taken?
A reserved bed is held for one student, so nobody else can be put in it and that student cannot hold a second bed. Only occupied beds are on the night roll-call.

Do stays end by themselves at the end of term?
No. When a stay's **Until** date has passed, the Hostels page warns you. Extend the dates of those staying on, and press **Free those beds** for the rest.

Take the night roll-call in a dormitory

Each night the matron or patron marks a dormitory's boarders present, late or absent. Boarders missing without a reason are reported.

For: Warden, Teacher, Director of studies · app.schooldynamics.ug/help/facilities/night-roll-call

Every night the matron or the patron of a dormitory checks that its boarders are in. **Night roll-call** lists the dormitory's boarders and you mark each one. When you close it, the page names every boarder who is absent without a known reason, and a message can tell the people who look after the dormitory and the head teacher.

Open it from **School life › Facilities › Night roll-call**.

Before you start

- A dormitory is a building under Hostels, and its boarders are the active students holding an **occupied** bed in it. If nobody does, you see *Nobody holds a bed in Block A. Give the boarders their beds under Hostels first.*
- The head teacher, the deputy, the director of studies, the warden and the school administrator can take the roll-call in any dormitory.
- A teacher takes it only in a dormitory where they are the matron or the patron. The warden, the director of studies or the school administrator names them (see below).

Name each dormitory's matron and patron

The **Roll-calls** tab lists the **Dormitories** with their number of boarders, their matron and their patron.

1. Press the pen beside the dormitory.
2. Choose the **Matron**, who takes the roll-call here and is told who is missing.
3. Choose the **Patron**, who also takes the roll-call here and is told.
4. Press **Save matron and patron**.

Either may be left empty. A dormitory with neither has its missing boarders reported to the wardens. The change is written in the school's audit log.

> **GOOD TO KNOW**
>
> The matron and patron are chosen from the school's active staff. To take the roll-call they also need a role that allows it, such as teacher or warden.

Take the roll-call

1. On the **Roll-calls** tab, choose the **Dormitory**. The number beside each one is its boarders.
2. Check the **Night**. Tonight is filled in.
3. Press **Take the roll-call**. The list of the dormitory's boarders opens.
4. Mark each boarder **Present**, **Late** or **Absent**. If most are in, press **Everyone present**, then mark the few who are not.
5. Press **Close roll-call** and confirm.

The list works like a class roll-call (see Taking a roll-call):

- The counts at the top show **Present**, **Late**, **Absent** and **Expected**. Late boarders count as present.
- **Undo** takes back the last mark (`Ctrl` + `Z`).
- Scan a student card or type a student number in the box and press **Mark present**, or press **Scan cards with the camera**.
- **Everyone**, **Absent**, **Here** and **Late** show only those boarders.
- Marks are kept on the device when the internet drops, and sent when it is back.

Away for a reason. Above the list, the page names the boarders who are **On leave** and those **Seen at the sick bay today**, with the note *Mark them absent: they are not reported as missing.*

- *On leave* means the boarder was marked present on a *Leaving school* roll-call this term, and has not been marked present on a *Reporting at school* roll-call since.
- *Seen at the sick bay* means a sick-bay visit was recorded for them that day.

After you close it

A closed roll-call shows either *Every boarder was accounted for.* or **Missing:** with the names, and when they were reported.

A boarder is *missing* when they are marked absent and are neither on leave nor seen at the sick bay that day. If the school has switched on the automatic message **Missing at night roll-call**, a message about each missing boarder goes to the dormitory's matron and patron (or the wardens, when it has neither) and to the head teacher. Each person hears about a boarder once a night, and the person who took the roll-call is not sent one. The message is off until the school switches it on: see Automatic messages.

> ⚠ **CAREFUL**
>
> Closing cannot be undone. Check the absent boarders first: a boarder you forgot to mark stays absent, and may be reported as missing.

The term's night roll-calls

Under the dormitories, **Night roll-calls** lists those taken this term: the night, the dormitory, who took it, present out of expected, absent, and whether it is **Open** or **Closed** (with the number of alerts sent). Press **Continue** to finish an open one, or **Look** to see a closed one.

Who was missing this term

The **Who was missing** tab is the dormitory's report for the term chosen in the top bar. Choose the dormitory. The page shows:

- **Nights taken**, **Boarders ever missing** and **Missing nights**;
- each boarder who was ever absent: their class, **Nights missing** and **Which nights**, and how many nights they were away **On leave** or at the **Sick bay**. The boarders missed most often are at the top.

Only closed roll-calls count. **This term** on a roll-call's page opens this report for its dormitory.

Good to know

- A dormitory has one roll-call a night. Opening the same night again opens the same roll-call.
- A night can be taken up to 7 days late. A future night is refused: *That night has not come yet.*
- A night roll-call is also kept with the school's other roll-calls, as *Activity participation*.

QUESTIONS

Can I take last night's roll-call this morning?
Yes. Choose that night in the **Night** box. A night roll-call can be taken up to 7 days late, but never for a night that has not come.

Two of us opened the same dormitory and night. Are there now two roll-calls?
No. A dormitory has one roll-call a night. The second person opens the same one and carries on with it.

Why is a dormitory not in my list?
A teacher sees only the dormitories where they are the matron or the patron. Ask the warden or the director of studies to name you.

Can I change a roll-call after closing it?
No. Closing asks *Close this roll-call? It cannot be changed afterwards.* Mark everyone before you close.

Does a boarder in a reserved bed appear on the list?
No. The list is the active students holding an occupied bed in the building, under Hostels.

Visiting days, time slots and bookings

Split a visiting day into times, let parents book one in the app (or book for them), and sign each family in at the gate.

For: Secretary, Warden, Head teacher · app.schooldynamics.ug/help/facilities/visiting-days

On a visiting day, families come to see their children. To avoid a crowd at the gate, the office splits the day into times, each taking so many families. Parents book a time in the School Dynamics app (or the office books for them), and on the day the gate finds the booking and signs the family in.

Open it from **School life › Facilities › Visiting days**.

Before you start

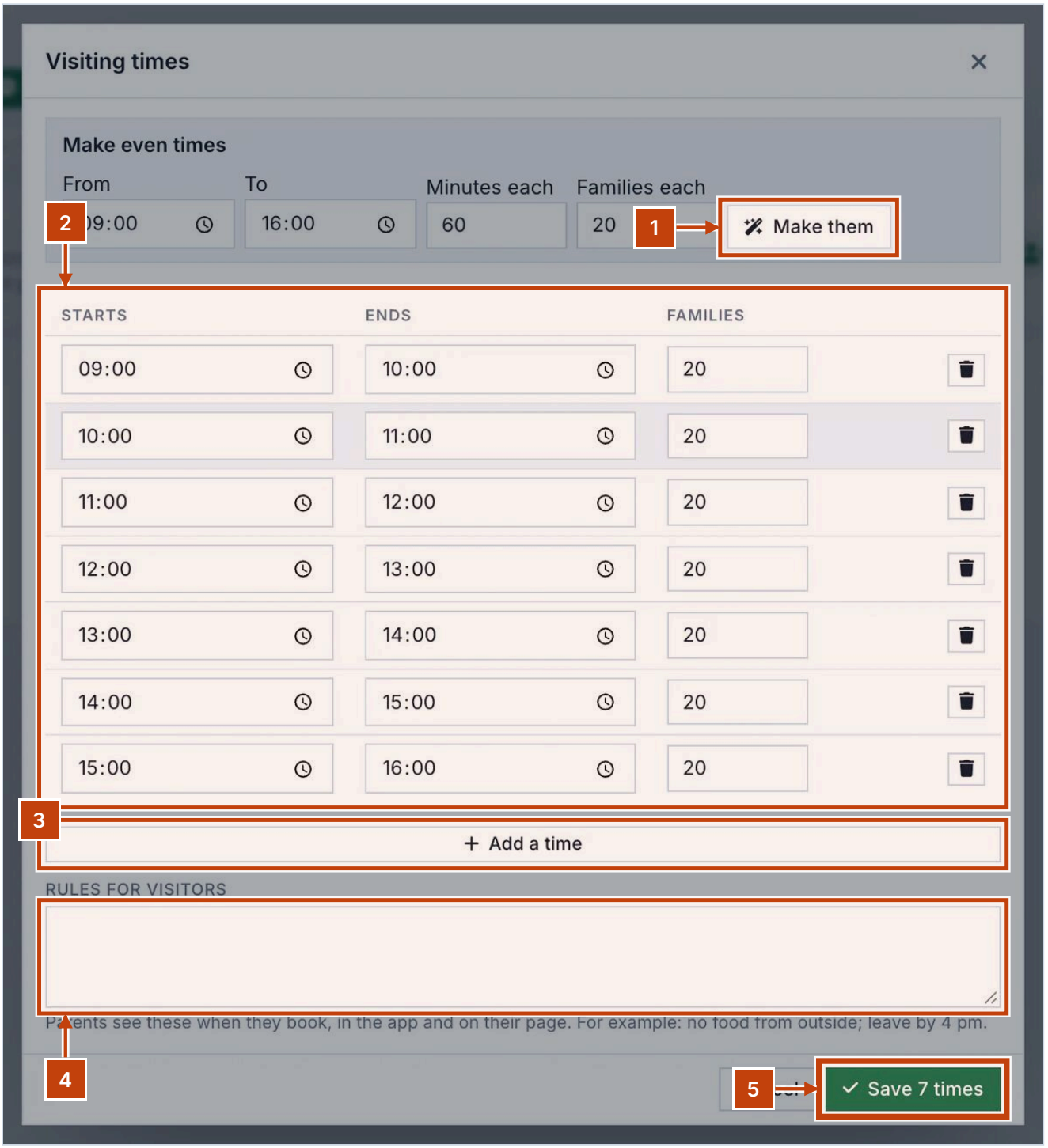
- A visiting day is an entry on the school calendar of the kind *Visiting day*. With none, the page says *No visiting day yet* and, for those who may add one, offers **Add a visiting day**. **New visiting day** at the top does the same.
- The head teacher, the deputy, the secretary, the warden and the school administrator set the times and book for families.
- The gate (receptionist, security, gate keeper) and the school administrator sign families in. They see the **At the gate** tab, which opens first for the gate staff.

Choose the day

Choose the visiting day in the box at the top. Upcoming days are listed; tick **Past days** to see earlier ones. For the chosen day the page shows:

Figure	Means
Families booked	Bookings not cancelled, out of the places the times offer.
People coming	The people the booked families said they would bring.
Signed in	Families signed in at the gate.
Did not come	Booked, not signed in, and their time is over (by half an hour).
Walk-ins	Visitors signed in that day to see a student, with no booking.
Visiting day	The date, and whether it is for every family or boarders' families only.

Set the times



The demo school · invented names and figures

1. Fill the day with even times: first start, last end, minutes each and families each.
2. Each time and how many families it takes. Change any of them.
3. Add one more time by hand.
4. Rules parents see when they book.
5. Save the times. Parents can book them at once.

1. Open the **Times** tab.
2. Press **Set the times**.
3. Under **Make even times**, type **From**, **To**, **Minutes each** and **Families each**, then press **Make them** 1. The list fills with times.
4. Change any start, end or number of families in the list 2, or remove a time with its bin. **Add a time** 3 adds one more.
5. Type the **Rules for visitors** 4, for example *No food from outside; leave by 4 pm*.
6. Press **Save** 5. The button says how many times you are saving, for example **Save 7 times**.

The **Times** tab then lists each time with **Families booked**, **Places** and a **How full** bar.

The rules for the times:

- **Minutes each** is from 15 minutes to 8 hours, and a day has at most 40 times.
- Times must not overlap, and each takes from 1 to 1,000 families.
- A time families have booked stays. It cannot be removed, and cannot take fewer families than have booked it. **Make them** keeps those times in the list for you.

How parents book

Parents see the times and the rules in the School Dynamics app and on their page, and book one for one or more of their children, saying how many people are coming (up to 10). A parent books until their time begins, and can cancel until the day before. A day for boarders only takes only boarders' families. Each child can be booked once per visiting day, and a full time takes nobody more.

Book for a parent who calls

On the **Bookings** tab, press **Book for a parent**.

1. In **The child being visited**, type the child's name or student number and click them.
2. Their brothers and sisters with the same parent are listed under **Visiting**. Tick the ones being visited.
3. Choose the **Time**. Each time says how many places are left; a full one cannot be chosen.
4. Check **People coming** and the **Name of the person coming** (the parent, filled in). Add a **Phone** and a **Note for the gate** if needed.
5. Press **Book the time**.

The office can book any time on the day itself, until the day is over.

The bookings list

The **Bookings** tab lists the day's families by time: the family and phone (and *booked by the office* when it was), the children being visited, the people coming and the status. Search by family, phone or child, or choose one time.

To cancel a booking, press the cross beside it and confirm. The place is freed for another family.

At the gate

On the day, the gate opens **At the gate**. Each row is a family: the name, how many people, the time and the children.

1. Find the family: type the family's name, phone or a child's name.
2. Press **Sign in**.

The family is signed in at that time and the visit is written in the visitors' book, as a visit to the (first) child, naming every child they came to see. Each family is signed in once, and only on the visiting day itself. A cancelled booking cannot be signed in.

A family without a booking is signed in as an ordinary visitor: **Open the visit log** under the list takes you there. They count as walk-ins.

Good to know

- If the school has switched on the automatic message **Visiting time reminder**, each family still booked is reminded the day before. See Automatic messages.
- A booking still not signed in half an hour after its time ends shows **Did not come**.

QUESTIONS

How do I add a visiting day?
On the school calendar, add an entry of the kind *Visiting day*. Tick *Only parents of boarders may book* if it is for boarders' families. It then appears here.

Can I change the times after parents have booked?
Yes, but a time that families booked cannot be removed, and cannot take fewer families than have booked it. Cancel their bookings first if you must.

A parent cannot come. Who cancels?
The parent can cancel in the app until the day before. On the day, the office cancels it here with the cross beside the booking.

A family arrives without a booking. What do I do?
Sign them in as an ordinary visitor in the visit log. They are counted as a walk-in on this page.

Can a family book twice?
No. A child can be booked once per visiting day, so a second booking for the same child is refused.

Record sick-bay visits

Write down every visit to the sick bay, with the symptoms, the result, the treatment and its cost, and keep the school's list of diseases.

For: Nurse, School administrator · app.schooldynamics.ug/help/facilities/sick-bay

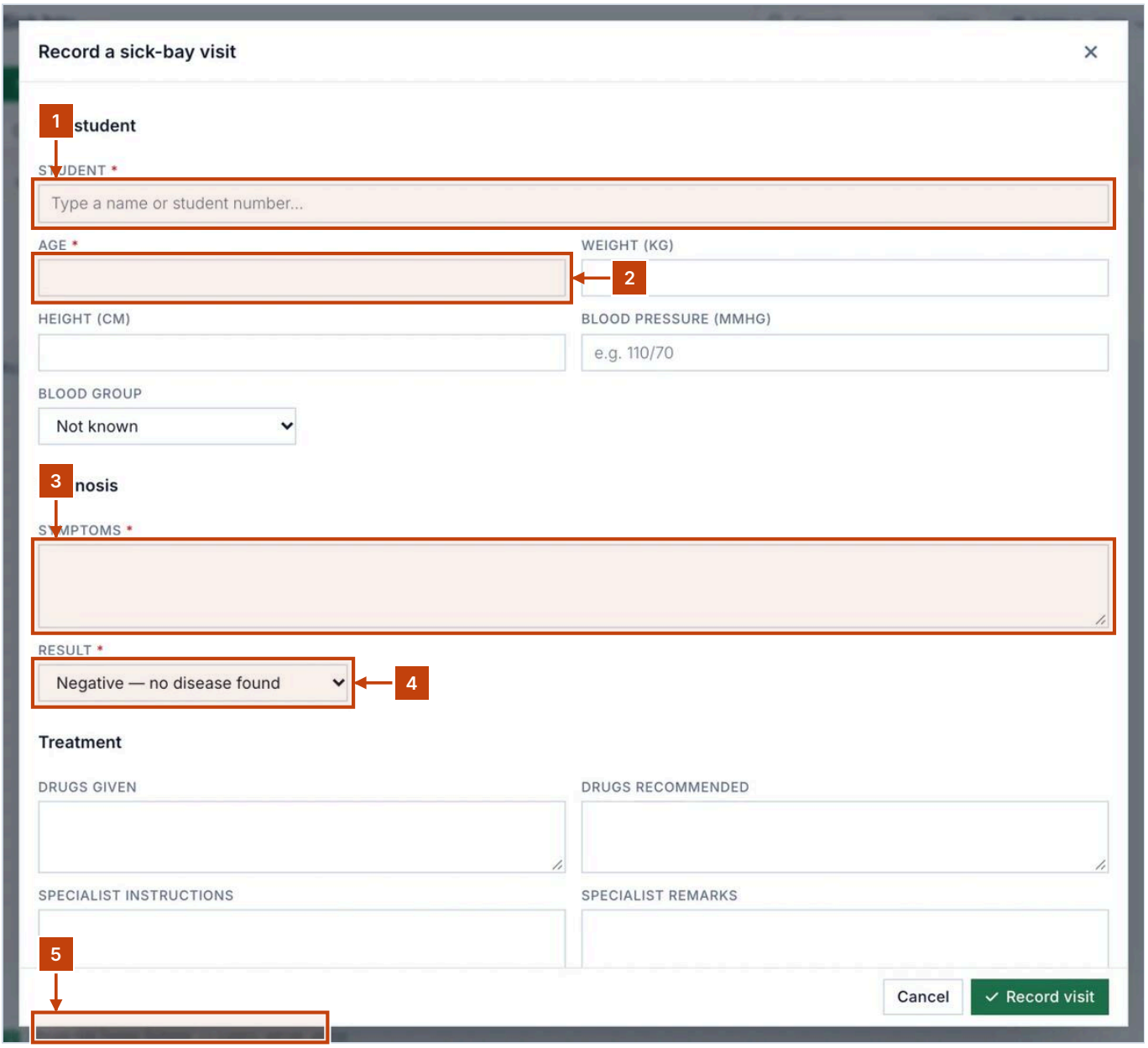
The sick bay keeps a record of every student who comes in: what they complained of, what the nurse found, what was given and what it cost. The record stays with the student, so the nurse can see their earlier visits, and the school can see what is going round.

Open it from **School life › Facilities › Sick bay**. It has two tabs: **Visits** and **Diseases**.

Before you start

- Only the nurse and the school administrator can open the sick bay (and the school's owner, who sees everything).
- The school needs an active term: every visit is filed under the term it was recorded in. Without one you see *Set the school's active term first: every sick-bay visit is filed under a term.*
- Add the diseases you diagnose most often (malaria, flu…) on the **Diseases** tab first. A positive result must name one.

Record a visit



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1. Type the student's name or number and click them.
2. The age fills in from the date of birth when the school has it.
3. What the student complains of.
4. Negative, or Positive: then choose the disease.
5. The cost of the treatment, in shillings (0 if none).

1. On the **Visits** tab, press **Record a visit**.
2. Under **Student**, type the student's name or number and click them 1. **Change** picks another.
3. Check the **Age** 2. It fills in from the student's date of birth when the school has it. Add the **Weight (kg)**, **Height (cm)**, **Blood pressure (mmHg)** and **Blood group** if you took them.
4. Write the **Symptoms** 3.
5. Choose the **Result** 4: *Negative — no disease found*, or *Positive — diagnosed*. For a positive result, choose the **Disease**, and tick any **Other diseases** found at the same visit.
6. Write the **Drugs given** and **Drugs recommended**, and any **Specialist instructions** or **Specialist remarks**.
7. Type the **Cost of treatment (UGX)** 5. Type 0 when there is no cost.
8. Tick **Serious case: tell the head teacher** (lower in the dialog) if it is serious.
9. Press **Record visit**.

A negative result clears any disease chosen before. The main disease is not repeated among the other diseases.

What happens next

- **The parent.** If the school has switched on the automatic message **Seen at the sick bay**, the parent gets a short message that their child was seen, and at what time. It never says why: no complaint, result or medicine. It goes once per visit, and only for visits recorded after the message was switched on.
- **The head teacher.** For a serious case, if the school has switched on **Serious sick-bay case**, each head teacher is told who was seen and when, never why. It goes once per visit, including when you mark a visit serious later.
- **The night roll-call.** A boarder seen at the sick bay that day is not reported as missing at the night roll-call.

Both messages are off until the school switches them on: see Automatic messages.

Find and read visits

The **Visits** tab shows the term's figures: **Visits** (and how many students), **Diagnosed** (with the disease seen most often) and **Cost of treatment**. The active term is chosen when the page opens.

Below them is the list: date and time, student, age, symptoms, result (**Positive** with the disease, or **Negative**, and **Serious** when marked) and cost. To narrow it:

- search by student or symptoms;
- choose a term, or **Every term**;
- choose **Any result**, **Positive** or **Negative**;
- choose a disease (a visit counts when it is the main disease or one of the others).

Click a student's name (or the eye) for a quick view of the visit: the measurements, symptoms, drugs, who recorded it, and the student's earlier visits. **Full record** opens the visit on its own page, with every other visit by that student. **Edit** opens the visit to correct it, on either.

Export downloads the list as it is filtered, as a spreadsheet (CSV).

Diseases

The **Diseases** tab is the school's list. Each disease shows how many times it was **Diagnosed**; click the number to see those visits.

- **Add disease**: type the **Name** (for example *Malaria*) and a **Description** if you like, and press **Add disease**.
- The pen beside a disease changes it: press **Save disease**.

A disease name can be on the list only once: *Malaria is already on the list.* Diseases are never deleted.

Good to know

- Visits are never deleted. A mistake is corrected with **Edit**; the visit keeps its term.
- Sick-bay records are private. Every time someone opens a visit, and every export, is written in the school's audit log.

QUESTIONS

Can I delete a visit recorded by mistake?
No. Visits and diseases are never deleted. Open the visit and correct it with **Edit**.

Is the parent told what the child was treated for?
No. If the school switched on the message *Seen at the sick bay*, the parent hears only that the child was seen, and at what time. Never the complaint, the result or the medicine.

Who can see sick-bay records?
Only the nurse and the school administrator (and the school's owner). Each time someone opens a visit, it is written in the school's audit log.

The disease I need is not in the list.
Add it on the **Diseases** tab with **Add disease**, then choose it in the visit.

School transport, routes, students and trips

Set up routes, stages and their fares, and the vehicles. Put students on transport (billed as a service) and record each trip and who rode.

For: Bursar, School administrator · app.schooldynamics.ug/help/facilities/transport

Transport keeps the school's bus and van service: the routes and their pick-up points with fares, the vehicles and drivers, the students who ride (each billed through a service), and every trip with who rode.

Open it from **School life › Facilities › Transport**. It has five tabs: **Overview**, **Routes & stages**, **Vehicles**, **Students** and **Trips**.

Before you start

- The bursar and the school administrator set up routes, fares and vehicles and put students on transport. These need both transport and finance rights, because putting a student on transport bills them.
- Drivers can open every transport page (they need the routes and the parents' phones) and record trips. They change only the trips they drive.
- Students are billed through a service. Make sure the school has a service for transport, with the right fee, under Services.

Routes and stages

A **route** is the run a vehicle makes, for example *Namugongo – Seeta, morning*. Its stages are the pick-up points along it, each with a single-trip fare (one way, per term) and a round-trip fare (both ways, per term).

1. On **Routes & stages**, press **New route**.
2. Type the **Route name** and, if you like, a **Description** (the areas it passes, the timing).
3. Press **Add route**. The new stage dialog opens by itself.
4. Type the **Stage name** (for example *Kibuli stage*), the **Single-trip fare (UGX)** and the **Round-trip fare (UGX)**. Type 0 for a fare there is none of.
5. Press **Add stage**.
6. Add the route's other stages with **Stage** on the route's card (or **New stage** at the top).

Each route is a card listing its stages, their fares and how many students are riding from each now. A route's name must be new in the school, and a stage's name new on its route.

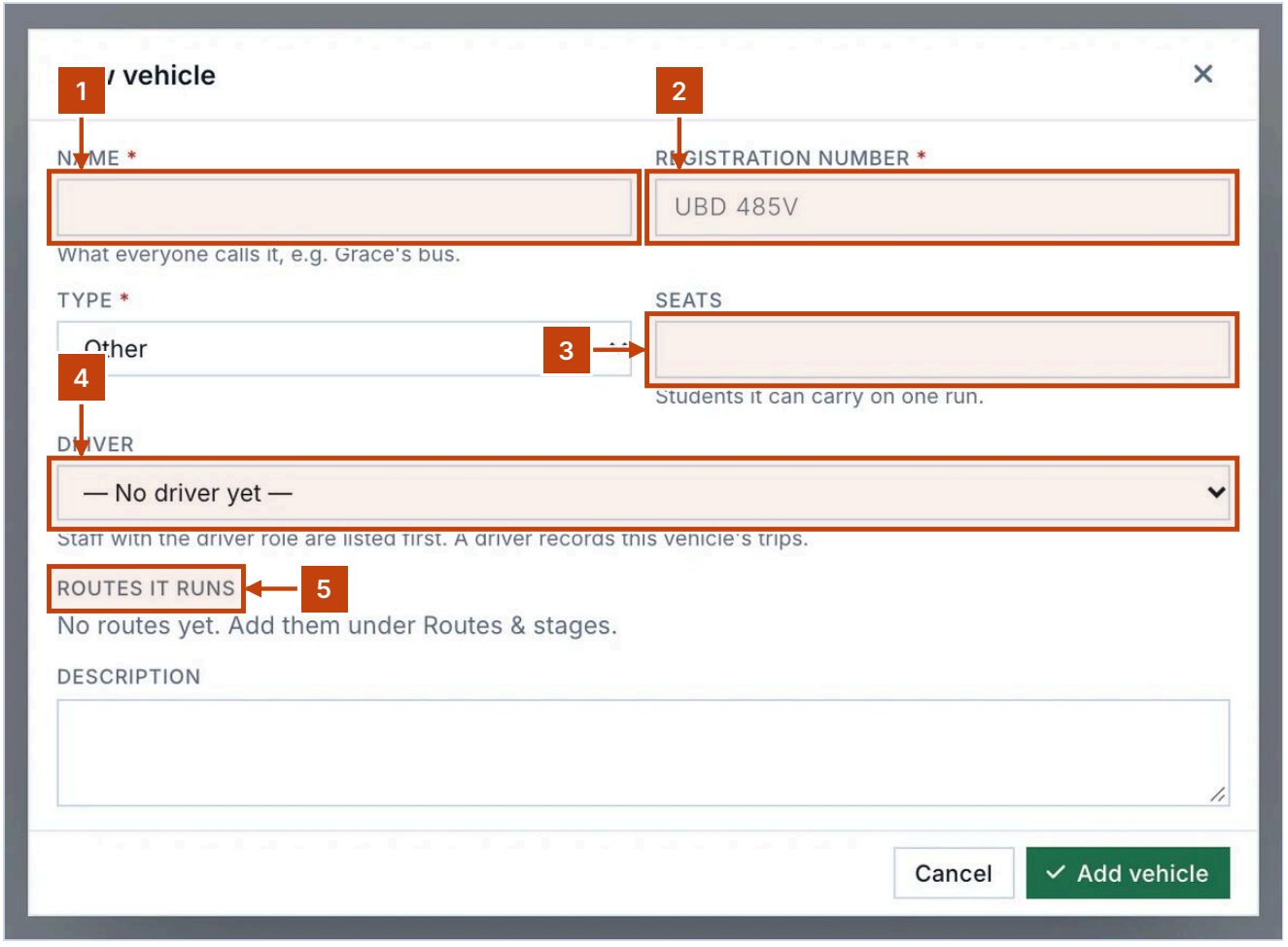
- **Change a stage**: press its pen. Students already on the stage keep the fare they were subscribed at; new subscriptions use the new fares. Choosing another **Route** moves the stage, and its students move

with it.

- **Rename or describe** and **Delete route** are in the route's ⋯ menu. Only a route with no stages, students or trips can be deleted. A stage can be deleted only if no student was ever put on it.
- **Stages not on any route** (from the old system) are listed at the bottom. Press **Put on a route** before students can be put on them.

A route's quick view. Click a route's name. It shows the riders in the morning and afternoon against the seats, the vehicles and drivers (with the driver's phone), and the roster for a term, stage by stage, with each student's class, trip, parent and phone. From there: **Export** (a spreadsheet), **Print roster** (a PDF for the driver), **Put students on it**, **Rename** and **Stage**.

Vehicles



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1 What everyone calls it.

2 The registration number. No two vehicles can share one.

3 Students it can carry on one run.

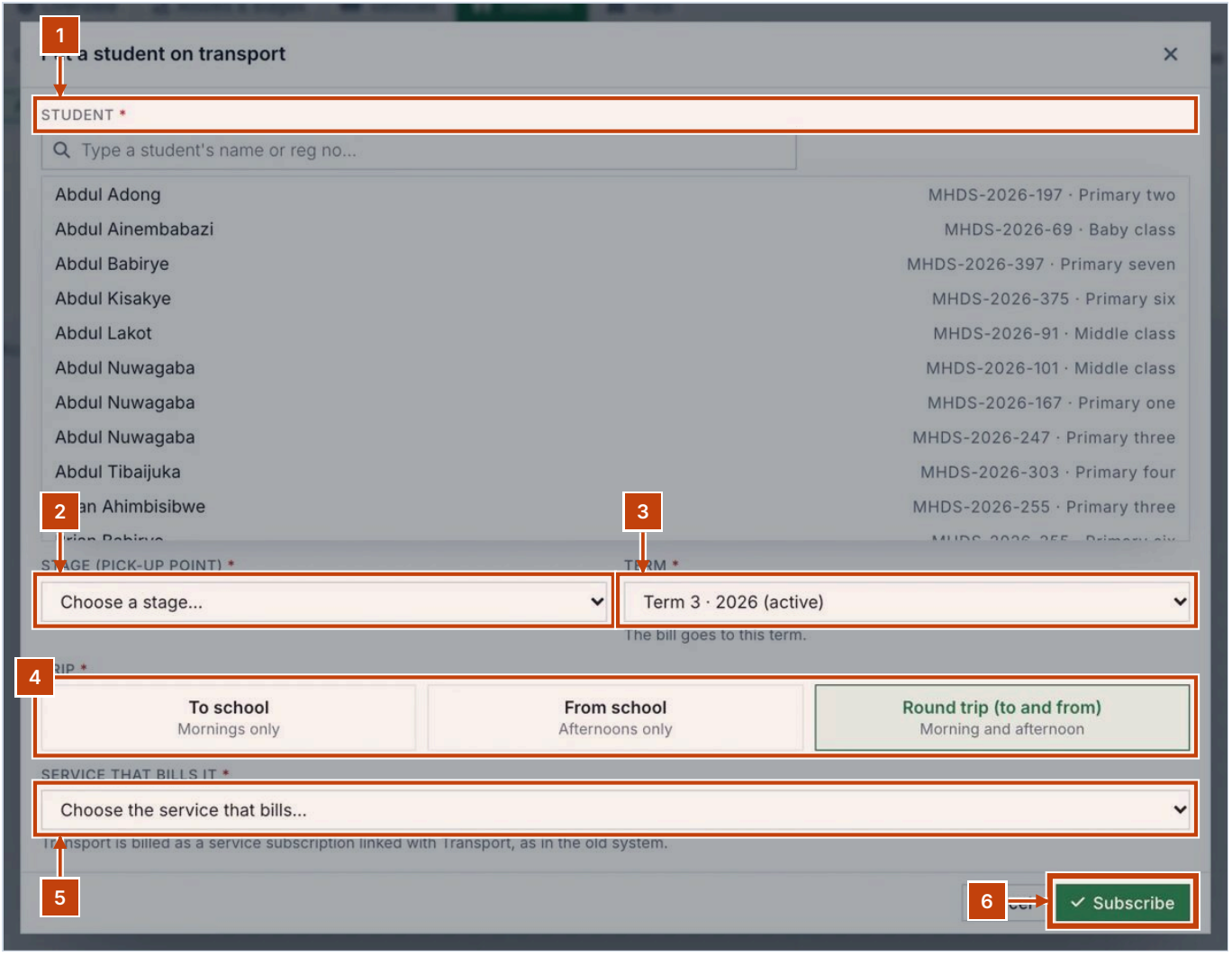
4 The driver, from the staff. Staff with the driver role come first.

5 The routes this vehicle runs.

On **Vehicles**, press **New vehicle**. Type the **Name** 1 and the **Registration number** 2, and choose the **Type** (bus, car, van…). Add the **Seats** 3 (1 to 200), the **Driver** 4 and tick the **Routes it runs** 5. Press **Add vehicle**.

The list shows each vehicle's driver, seats, the routes it runs and its trips this month. Click a vehicle for its quick view. A vehicle can be deleted only while no trip was made in it.

Put a student on transport



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1. Find the student by name or reg no.
2. The stage where they board, grouped by route, with its fares.
3. The term the bill goes to.
4. To school, from school, or a round trip. Each shows the stage's fare.
5. The service that bills it. Services whose fee equals the fare come first.
6. Subscribe and bill the service's fee.

1. On **Students**, press **Subscribe a student**.
2. Choose the **Student** 1.
3. Choose the **Stage (pick-up point)** 2 and the **Term** 3.
4. Choose the **Trip** 4: *To school*, *From school* or *Round trip (to and from)*.
5. Choose the **Service that bills it** 5. The one whose fee equals the stage's fare is suggested.
6. Read the summary under it: what will be billed and, when the route's vehicles have seats recorded, how full the route is.
7. Press **Subscribe and bill UGX …** 6 (or **Subscribe** when the service costs nothing).

The service's fee is billed to the student's account for that term, and the student is on the stage's roster.

> ⚠ CAREFUL
>
> The bill is the **service's fee**, not the stage's fare. When the two differ, the summary warns you: *The bill follows the service's fee.…* Choose a service whose fee equals the fare to bill the fare.

A student can be on transport once a term. If they already are, the dialog says so and offers **Change the stage instead**. Saving anyway is refused: *… is already on transport for Term 2 · 2026 (…). Change the stage or remove that subscription first.*

A whole group. Press **Subscribe a group**. Choose the stage, term, trip and service as above. Under **Students**, choose a class and press **Add its active students** (repeat for other classes; the cross takes one student out). Press **See who will be billed**: the next screen shows the **Students to subscribe**, the total **Billed in total**, and those **Left as they are** with the reason. Press **Subscribe … and bill UGX …** and confirm, then **Done**. Up to 3,000 students at a time.

Change, pause or take a student off

Each student's ⋯ menu on **Students**:

Choice	What it does
Change stage or trip	Moves the student to another stage or trip type. The bill is unchanged.
Edit amount or description	Corrects the figure the roster and the fares totals show. It is not a bill: the student's account does not change.
Pause (keeps the bill)	The student is not expected on trips. The bill stays. **Resume riding** undoes it.
Open its service subscription	Opens the service subscription that billed it.
Take off transport	Asks **Why**, then removes the student and their service subscription, and credits back what it billed.

To bill differently, take the student off transport and subscribe them again.

Tick several students to **Pause**, **Resume** or **Take off transport** together.

Finding students. Search by student, reg no or stage; choose a term, a route or a trip type; and show **All**, **Riding**, **Paused**, **Not billed through a service** or **Under the wrong route**. The **Billed** column shows what the service billed, or *Not through a service* / *Not billed yet*. **Export** downloads the list.

If a stage was moved to another route and some students are still listed under the old one, a warning says so. **Put them on the right route** fixes it; nothing is billed or credited.

Trips

Drivers record trips in the School Dynamics app. You can also start one here.

1. On **Trips**, press **Start a trip**.
2. Choose the **Route** and the **Direction** (*To school* or *From school*). The dialog says how many students are expected: everyone on the route this term who rides that way or both ways, except those paused.
3. Check the **Date** and the **Start time** (left empty: now).
4. Choose the **Driver** (a driver starting a trip is the driver), and the **Vehicle** if you like.
5. Type the **Start mileage (km)** and, if you like, the **Location** (or press the location button).
6. Press **Start the trip**.

The trip opens with every expected student. Mark each **On board**, **Dropped off** or **Absent**, or tick several and press one of those buttons. **Add a passenger** adds a student who was not expected; they are added on board.

To finish, press **Close the trip**. Give the **End time** and **End mileage (km)**, tick *The students still on board were dropped off* if they were, and press **Close the trip**. The trip records how many rode and how many were absent.

In the trip's ⋯ menu, **Correct driver, vehicle, times or mileage** fixes a trip, and **Cancel the trip** cancels one started by mistake. A cancelled trip stays in the list, marked cancelled.

The system refuses:

- a second trip on the same route, the same way, the same day while one is under way: open that one instead;
- a date that has not come yet, or more than 60 days ago;
- an end time before the start, or an end mileage below the start mileage.

Filter trips by dates, route, driver and direction, and show **All**, **Under way**, **Closed** or **Cancelled**. **Export** downloads them.

The overview

Overview shows one term at a glance (the active term when it opens; choose another in the box):

- **Students riding** (to school, from school, both ways), **Fares this term** (with what was billed through services, and how many are not billed), **Routes** (stages, vehicles, seats) and **Trips this month**;
- each route with its vehicle and driver, riders in the mornings and afternoons, seats taken and fares;
- the trips this month and last month: closed trips, riders on a trip on average, and the share of expected students who did not ride;
- boardings over the last 7 days, and the latest trips.

Good to know

- Nothing that students or trips point to is deleted: a stage with students, a route with stages, students or trips, a vehicle with trips.
- Taking a student off transport credits their account with what the service billed; see Student accounts.
- Paused students keep their bill but are not expected on trips.

QUESTIONS

What is the difference between a route and a stage?
A route is the run a vehicle makes. Its stages are the pick-up points along it, each with its own fares. Students are put on transport at a stage.

Why was the student billed a different amount from the stage's fare?
The bill is always the fee of the service you chose. The fare is what the roster shows. The dialog warns you when the two differ; to bill the fare, choose a service whose fee equals it.

A student stops using the bus for a few weeks. Do I take them off?
No. Use **Pause (keeps the bill)**. They are not expected on trips, and the bill stays. **Resume riding** brings them back.

Can a driver change fares or students?
No. Drivers see every transport page and record trips, and can change only the trips they drive.

I changed a stage's fare. Do the students already on it pay the new fare?
No. Students already on the stage keep the fare they were subscribed at. New subscriptions use the new fares.

Run the library

Keep the catalogue of books, lend them to students and staff, take them back, and follow up the ones that are overdue or lost.

For: Librarian, School administrator · app.schooldynamics.ug/help/facilities/library

The library pages keep the school's catalogue of books and every loan: who has which book, when it is due back, and which books are late or lost. Open them from **Facilities › Library**. There are three tabs: **Books**, **Loans** and **Categories & authors**.

Before you start

- The librarian and the school administrator can use the library pages.
- Set up the categories first. Every book goes in a category, and the **Category** list of a new book is empty until there is one.

Set up categories and authors

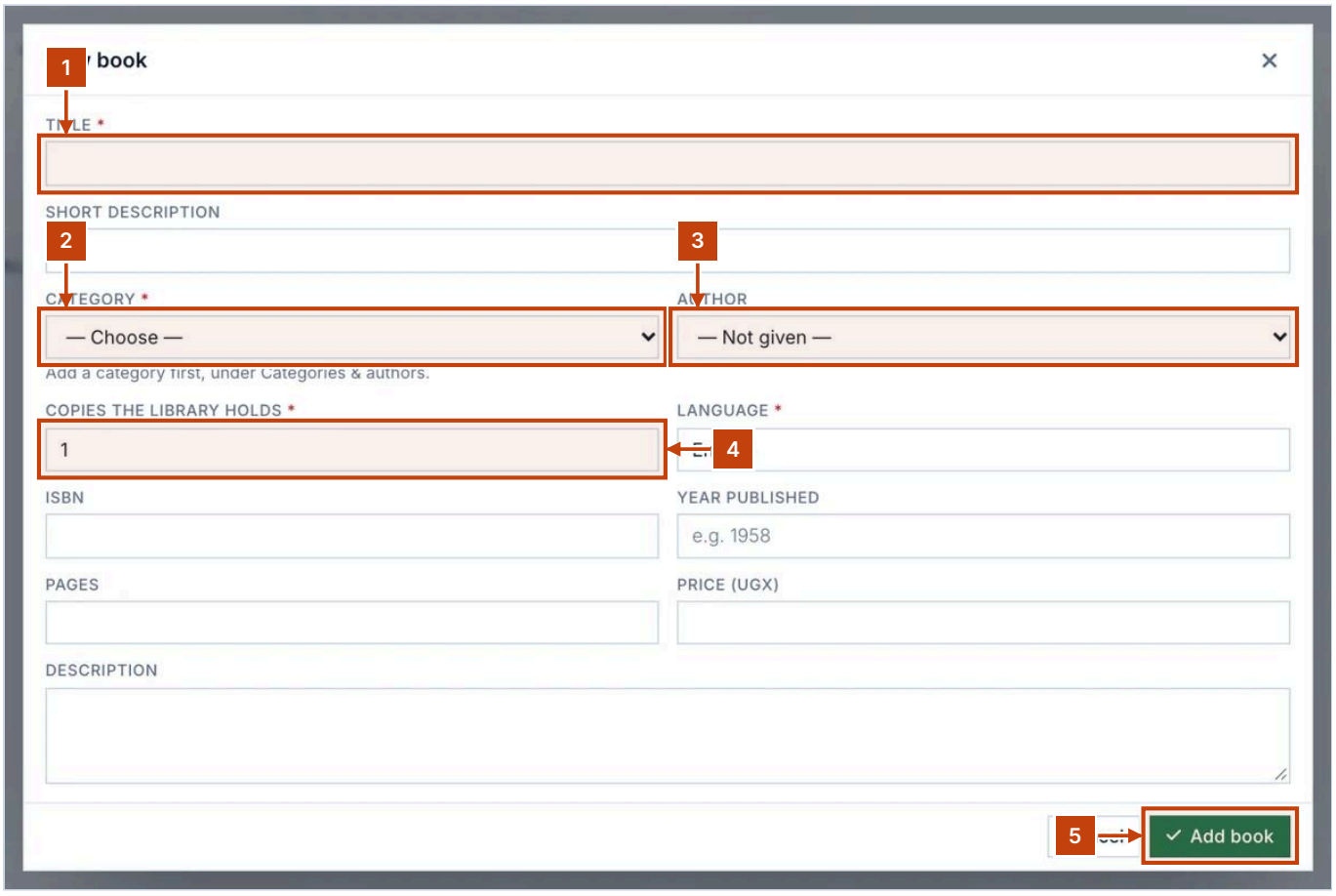
Categories go two levels deep: a group (such as *Fiction*) and the categories inside it (such as *Poetry*). Books go in a category that has no categories inside it.

1. Open the **Categories & authors** tab.
2. Press **Add category**.
3. Type the **Name**. Leave **Group** at *Top level* for a group, or choose the group this category sits in.
4. Press **Add category** at the bottom of the dialog.
5. Under **Authors**, press **Add author**, type the **Author's name** and press **Add author**.

The plus button beside a group adds a category inside it. A group that already holds books cannot have categories inside it. Two categories in the same group cannot have the same name.

You cannot remove a category that still holds books or has categories inside it, or an author who still has books in the catalogue. Move the books first.

Add a book



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1 The book's title

2 The category it goes in. Make categories under Categories & authors first.

3 The author, if you know it

4 How many copies the library holds

5 Add it to the catalogue

1. Open the **Books** tab and press **New book**.
2. Type the **Title** 1.
3. Choose the **Category** 2.
4. Choose the **Author** 3 if you know it. It can be left as *Not given*.
5. Type the number of **Copies the library holds** 4. Check the **Language** (English unless you change it).
6. Add the ISBN, year published, pages, price and description if you have them.
7. Press **Add book** 5.

The top of the **Books** tab counts the titles, the copies held, the copies on loan and the overdue loans. Each book shows its copies, how many are **On loan** and how many are **On the shelf**. Search by title, author or ISBN, or choose a category. Choose **With copies on loan** to see only books that are out.

Click a book's title to see who has it now (overdue first) and who borrowed it before. **Its loans** opens all the loans of that book.

> **GOOD TO KNOW**
>
> You cannot set a book's copies below the number out on loan. If 3 copies are out, the library holds at least 3.

Lend books



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1. Type the borrower's name or registration number, then pick them
2. Type a title or ISBN, then pick each book (up to 10)
3. The day the books are due back
4. Lend the books

1. Open the **Loans** tab and press **Lend books**.
2. Type the borrower's name or registration number in **Borrower** 1, then click the right person.
3. Type a title or ISBN in **Books** 2, then click the book. Repeat for each book, up to 10.
4. Check **Due back on** 3. It starts two weeks from today and cannot be in the past.
5. Press **Lend** 4.

Each book in the list says how many copies are on the shelf. A book with none on the shelf cannot be picked. The loan appears under **Out now**.

Take books back

1. On the **Loans** tab, find the loan under **Out now** or **Overdue**. Search by the borrower's name or registration number.
2. Press the eye button to open the loan.
3. Press **Returned** beside each book that came back, or **All books returned** if everything is back.

When every book on a loan is back (or written off as lost), the loan moves to **Returned**.

In the same dialog you can change the due date: choose the new date under **Change the due date** and press **Save due date**.

> ⚠ CAREFUL
>
> **Lost** writes the copy off. The library then holds one copy fewer of that book, and this cannot be undone from the loan. Use it only when the book is really gone.

Overdue loans and requests

The chips at the top of the **Loans** tab sort the loans: **Out now**, **Overdue**, **Requests**, **Returned** and **All loans**. The first three show how many there are.

A loan is overdue when its due date has passed and a book is still out. It shows an **Overdue** badge and how many days late it is. Remind the borrower, or change the due date.

A request is someone asking to borrow books. Open it, check **Due back on**, and press **Approve and lend**: the books go out at once, so a copy of each must be on the shelf. Press **Reject** to turn it down. Either answer is final.

QUESTIONS

Can a student borrow a book when every copy is out?
No. A book is lent only when a copy is on the shelf. In the **Lend books** dialog, a book with none on the shelf cannot be picked.

How do I remove a book the library no longer has?
A book that has never been lent can be removed with the bin button. A book that has been lent before stays in the catalogue, so its loans still make sense. Edit it and set its copies to 0 instead.

A book was lost. What do I do?
Open the loan, and press **Lost** beside the book. The copy is written off and the library holds one copy fewer.

Can I lend to a member of staff?
Yes. The borrower can be any student or member of staff of the school who is not deactivated.

Keep the store

Record what comes into the store and what goes out, see what is low, and hand out the uniforms and books that come with a service.

For: Store keeper, Bursar, School administrator · app.schooldynamics.ug/help/facilities/stores

The store pages keep the school's stock: each item, every delivery, everything that goes out, and the items students get with a service (a uniform, a set of books). Open them from **Facilities › Stores**. There are five tabs: **Overview**, **Items**, **Batches**, **Stock in & out** and **To hand out**.

Before you start

- The store keeper, the purchaser, the bursar and the school administrator can use the store pages.
- The school needs an active term: every movement is filed under it.
- A delivery needs a supplier. Suppliers are kept under **Procurement › Suppliers**.

How the store counts

Stock comes in as a batch: one delivery of one item, with its quantity, supplier and unit price. Everything that goes out is taken out of a batch. Each batch shows what is **Left** and what that is **Worth now** (left × unit price). An item's stock is what its current batches hold.

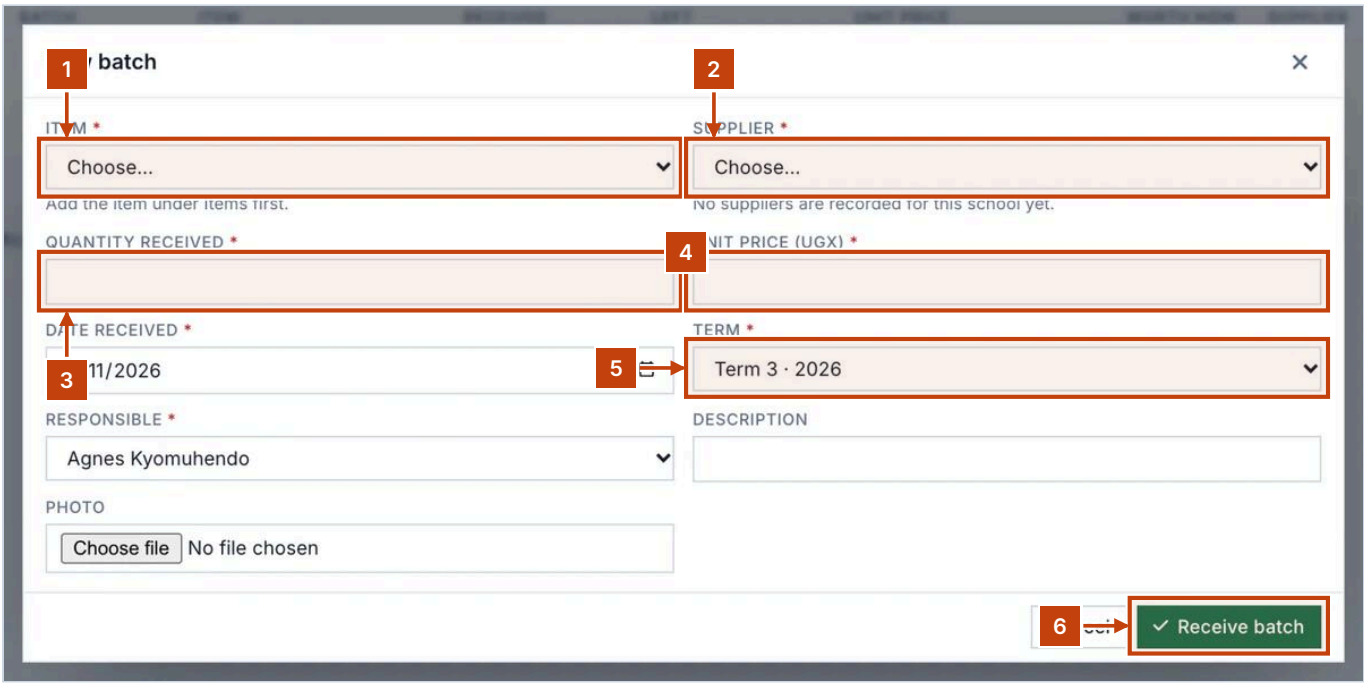
Add the items

1. Open the **Items** tab and press **New item**.
2. Type the **Name**. Each item's name is used once.
3. Under **Counted in**, type how it is counted: pieces, kg, boxes.
4. Type the reorder level. At or below it, the item shows **Reorder**.
5. Press **Add item**.

Each item shows its stock and a status: **In stock**, **Reorder** or **Out of stock**. The chips **Low or out** and **Out of stock** narrow the list. Click an item to see its current batches, what they are worth, its latest movements and how many wait to be handed out.

An item with batches, or one handed out with a service, cannot be deleted. Rename it if the name is wrong.

Receive a delivery



The demo school · invented names and figures

1 The item that came in

2 Who supplied it

3 How much came, in the item's unit

4 The price of one unit

5 The term this stock is for

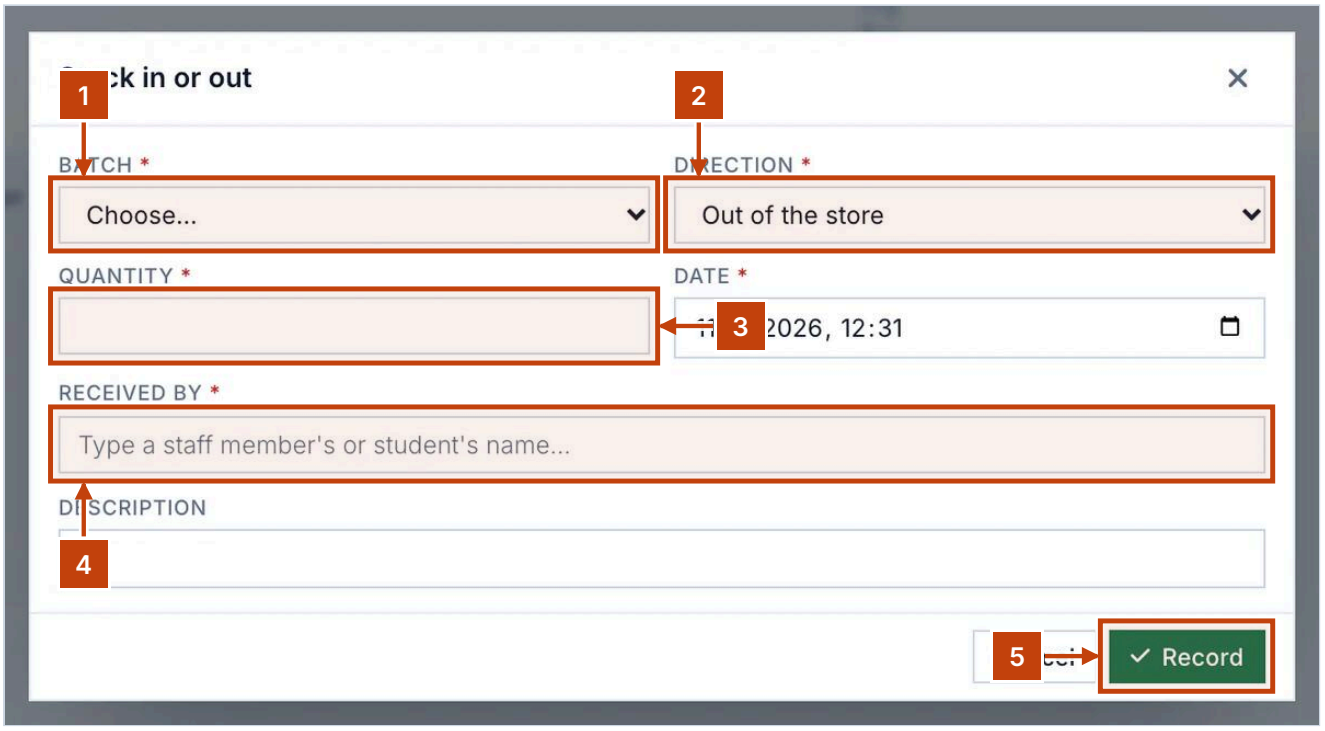
6 Record the delivery

1. Open the **Batches** tab and press **New batch**.
2. Choose the **Item** 1 and the **Supplier** 2.
3. Type the **Quantity received** 3 and the **Unit price (UGX)** 4.
4. Check the **Date received** and the **Term** 5. The term starts as the active term.
5. Check **Responsible**: the member of staff who keeps this stock. It starts as you.
6. Add a description or a photo of the delivery note if you like.
7. Press **Receive batch** 6.

The item's stock goes up at once. The batch list shows how many current batches there are and what they are worth.

You can correct a batch later with the pen button. Its quantity received cannot be less than what has already gone out of it, and once stock has moved its item cannot change.

Record stock going out (or coming back)



The demo school · invented names and figures

1 The batch the stock comes out of (or goes back into)

2 Out of the store, or into it

3 How much

4 Who received it: a member of staff or a student

5 Save the movement

1. Press **Stock in or out** (on the **Stock in & out** tab or the **Batches** tab). On the **Batches** tab, the arrow buttons on a batch's row open it for that batch.
2. Choose the **Batch** 1. Each one says how much is left.
3. Choose the **Direction** 2: *Out of the store* or *Into the store*.
4. Type the **Quantity** 3 and check the **Date**.
5. In **Received by** 4, type at least two letters of a staff member's or student's name, then click the person.
6. Press **Record** 5.

If you ask for more than the batch holds, the dialog says *Only … left in batch #…* and nothing is saved.

The **Stock in & out** tab lists the movements not yet archived, newest first. Narrow it by direction, item, term, who recorded it, or dates. **Export** downloads the movements the filters show. The pen button corrects a movement (quantity, date, who received it, description); its batch and direction stay. A correction that would take the batch below zero is refused.

Hand out items that come with a service

Some services come with things from the store, such as a uniform or a set of books. The service is set up that way under Services (*Items are handed out from the store with this service*). When a student is subscribed, each item waits for them on the **To hand out** tab.

1. Open the **To hand out** tab. It shows what is **Waiting** this term.
2. Find the student: search by name or registration number, or choose a service, item or class.
3. Press **Hand out** on the row. To hand the same item to several students, tick their rows and press **Hand out ticked**.
4. Choose the batch under **From batch**. The oldest batch with stock comes first.
5. Press **Hand out**.

Each hand-out is recorded as stock out of the batch, received by the student. When every item of a student's service is handed out, the service is complete. You can tick items of only one kind at a time, because they come out of a batch of that item.

The other buttons on a row:

- **Take back**: the item goes back into its batch (recorded as stock in) and waits to be handed out again. Say why.
- The note button: a short note on the item, such as *Size 32 next term*. Press **Save note**.
- The row menu: **Mark pending** (still waiting, for a reason), or **Cancel the hand-out…**. Cancelling takes all of that service's waiting items off the list; no stock moves and the bill stays. To undo it, find the row under **Cancelled** and press **Put back on the list**.

> ⚠ CAREFUL
>
> A movement made by handing out an item shows *Service item* on the **Stock in & out** tab and cannot be corrected there. Use **Take back** on the **To hand out** tab instead.

Start a new term

At the start of a term, press **Archive last term's stock** on the **Stock in & out** tab. The dialog says how many movements and batches from other terms will be archived, and how much they still hold. Press **Archive**.

Archived batches stop counting in the items' stock. Record what is still on the shelves as a new batch for this term. To look back, tick **Archived** on the **Batches** or **Stock in & out** tab.

The overview

The **Overview** tab shows the number of items, what the current stock is worth, how many items are out of stock or below their reorder level, and how many items are waiting to be handed out. Below are the items that are low or out, what is waiting to be handed out, the hand-outs not complete, the most valuable stock and the latest movements.

A school that has never received stock sees *Stores are not used yet* and a **Receive the first batch** button.

QUESTIONS

Why does an item show as out of stock when I know there is some on the shelf?
An item counts only its current batches. After **Archive last term's stock**, last term's batches stop counting. Record what is still on the shelves as a new batch for this term.

Can I take out more than a batch holds?
No. Stock out of a batch stops at what it holds, so stock never goes below zero. Take the rest from another batch of the same item.

Does receiving a batch pay the supplier?
No. A batch records the stock and what it is worth. Paying the supplier is recorded separately, under School finance.

Goods came in on a purchase order. Do I record a batch too?
No. When goods on a purchase order are received, each accepted line that names a store item goes into the store as a batch at the order's price. See Receiving goods.

Keep the fixed-asset register

Register what the school owns, who looks after each thing and what it is worth, check it every term, and print labels with a QR code.

For: Store keeper, Bursar, School administrator · app.schooldynamics.ug/help/facilities/fixed-assets

The fixed-asset register lists the things the school owns and keeps for years: furniture, computers, vehicles, machines. For each one it keeps who looks after it, what it cost, what it is worth now, its condition and when it next needs maintenance. Open it from **Facilities › Fixed assets**. There are four tabs: **Register**, **Checks & values**, **Categories** and **Labels**.

Before you start

- The store keeper, the purchaser, the bursar and the school administrator can use the register.
- Each asset is filed under a term. The active term is chosen for you.

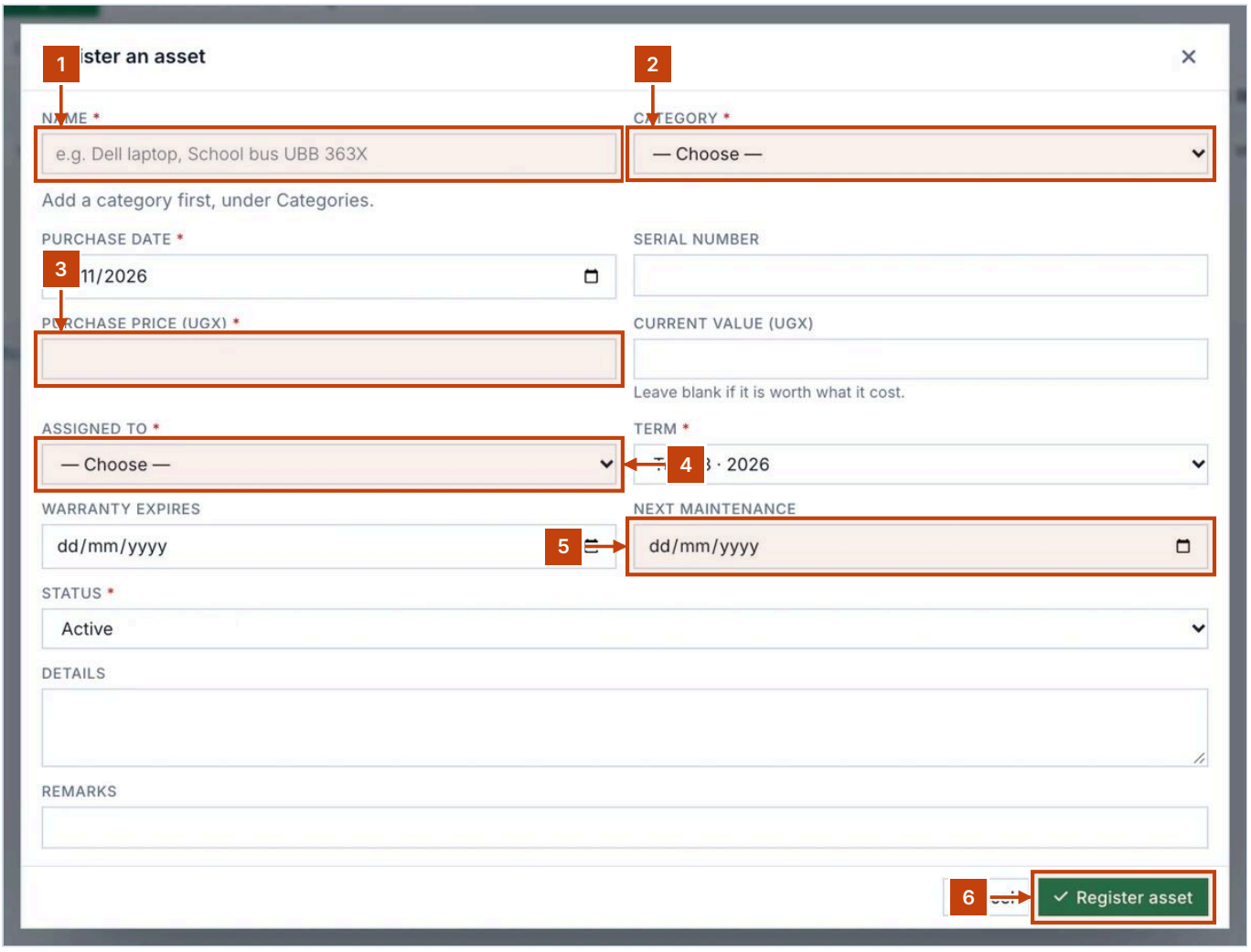
Make the categories

Every asset belongs to a category, and the category's code goes into every asset's code.

1. Open the **Categories** tab and press **New category**.
2. Type the **Name**, for example *Furniture*.
3. Type the **Code**: exactly 3 characters, for example *FUR*.
4. Press **Add category**.

Two categories cannot share a name or a code. The **Invested** and **Value now** columns add up the category's active assets only.

Register an asset



The demo school · invented names and figures

1. What the asset is
2. Its category: its code goes into the asset's code
3. What it cost
4. The member of staff who looks after it
5. When it is next due for maintenance (optional)
6. Register it and give it its code

1. On the **Register** tab, press **Register asset**.
2. Type the **Name** 1 and choose the **Category** 2.
3. Check the **Purchase date** and type the **Serial number** if it has one.
4. Type the **Purchase price (UGX)** 3. Leave **Current value (UGX)** blank if it is still worth what it cost.
5. Choose who it is **Assigned to** 4: any member of staff.
6. Add the **Warranty expires** and **Next maintenance** 5 dates if you know them.
7. Press **Register asset** 6.

The asset gets its asset code at once, for example *ABC-FUR-2026-0007*: the school's short name, the category code, the year and the asset's number in its category. The message that appears says the code.

The register

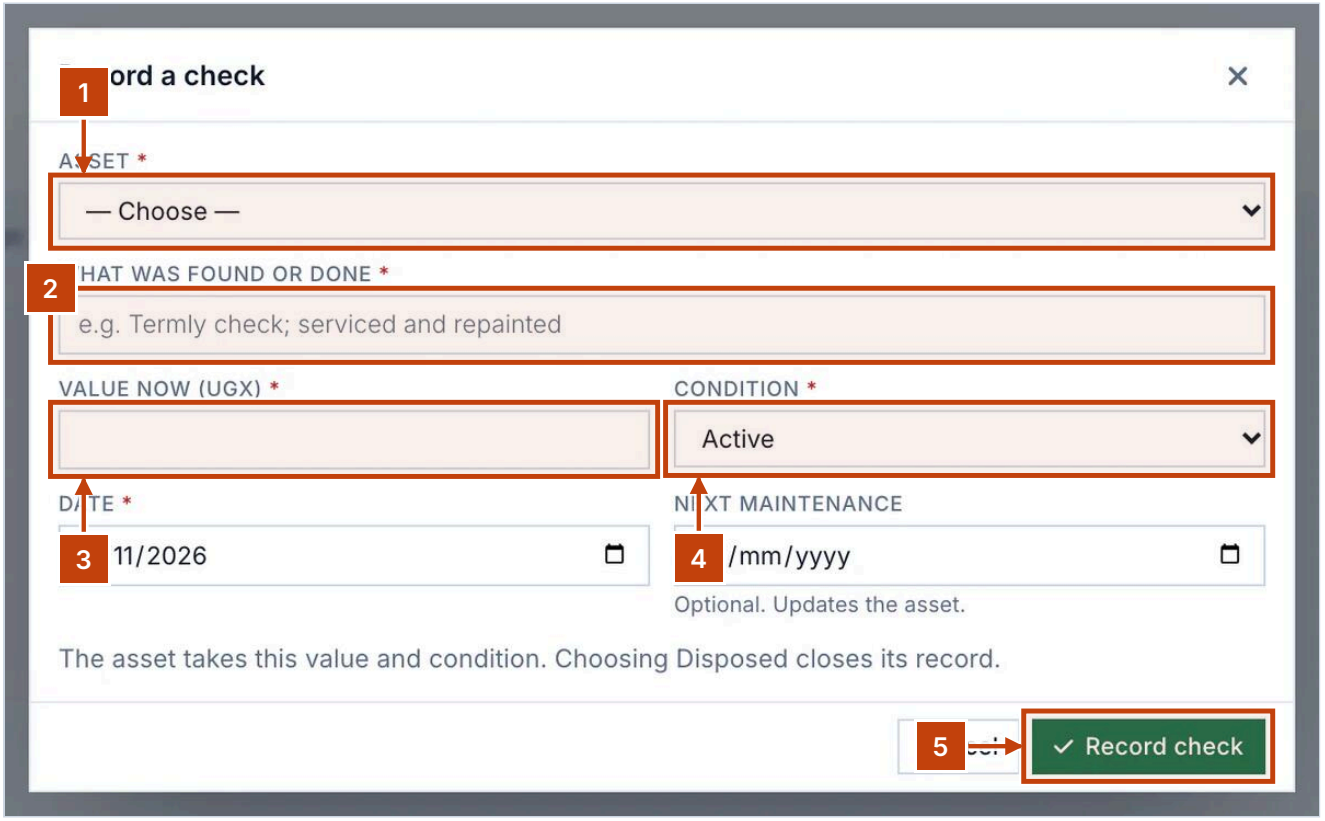
The top of the **Register** tab counts the active assets, what they are worth, the assets whose maintenance is due in the next 30 days, and the ones damaged or lost.

Search by name, code or serial number, or narrow the list by category, status or the person it is assigned to. **Maintenance due** shows the assets due in the next 30 days, or already late. A maintenance date of today or earlier is marked **Overdue**. **Export** downloads the list the filters show.

Click an asset's name for a quick view: its value, what it cost, when it was last checked, and its latest checks. **Full record** opens its own page, with every check and its value over time.

Check an asset

Check the assets regularly (every term is a good habit) and record what you find.



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1. The asset you checked
2. What you found or did
3. What it is worth now
4. Its condition: Active, Damaged, Lost or Disposed
5. Save the check

1. Press **Record a check** (on the **Register** tab, the **Checks & values** tab, or an asset's own page).
2. Choose the **Asset** 1. Its value and condition fill in.
3. Type **What was found or done** 2, for example *Termly check; serviced and repainted.*
4. Type its **Value now (UGX)** 3.
5. Choose its **Condition** 4.
6. Check the **Date**. It cannot be in the future. Add the **Next maintenance** date if it changed.
7. Press **Record check** 5.

The asset takes the new value and condition. The check keeps how much the value went up or down. **Checks & values** lists every check, with the net change at the bottom. Narrow it by **Went up** or **Went down or held**, by condition, or by dates.

> ⚠ CAREFUL
>
> Choosing **Disposed** closes the asset's record: it takes no more checks. Use it only for things the school has sold, thrown away or given away.

A check can record a value of up to UGX 99,999,999. For a bigger asset (a bus, a building), change the value with **Edit** on the asset instead.

Print labels

Each label carries the asset's name, its code, a QR code and a barcode.

- **One asset**: press the QR code button on its row in the register, or **Print label** on its own page. The label opens as a PDF.
- **A whole category**: open the **Labels** tab and press **New label sheet**. Type a **Title**, choose the **Category**, and choose a **Status** (Active to start with) or leave it at any status. Fill **Registered from** and **Registered to** to print only the assets registered between those days, or leave them blank for all. Press **Save sheet**.

Saved sheets stay on the **Labels** tab, with the number of labels each holds. Press **Print** to open the sheet as a PDF. A sheet always prints the assets that match it today, so it can be printed again after new assets are registered.

QUESTIONS

Can I delete an asset?
No. Assets and categories are never deleted. Record a check with the condition **Disposed** (or **Lost**), and the asset leaves the totals of active assets.

Can I change an asset's code?
No. The code is given once, when the asset is registered, and never changes, so the printed labels stay right.

I made a mistake in a check. How do I fix it?
Checks cannot be edited. Record a new check with the right value and condition.

Why can I not record a check for an asset?
An asset marked **Disposed** takes no more checks. Its record is closed.

Sign visitors in and out

Keep the gate's visitors' book. Sign each visitor in and out, see who is on the premises, and look up anyone who has visited before.

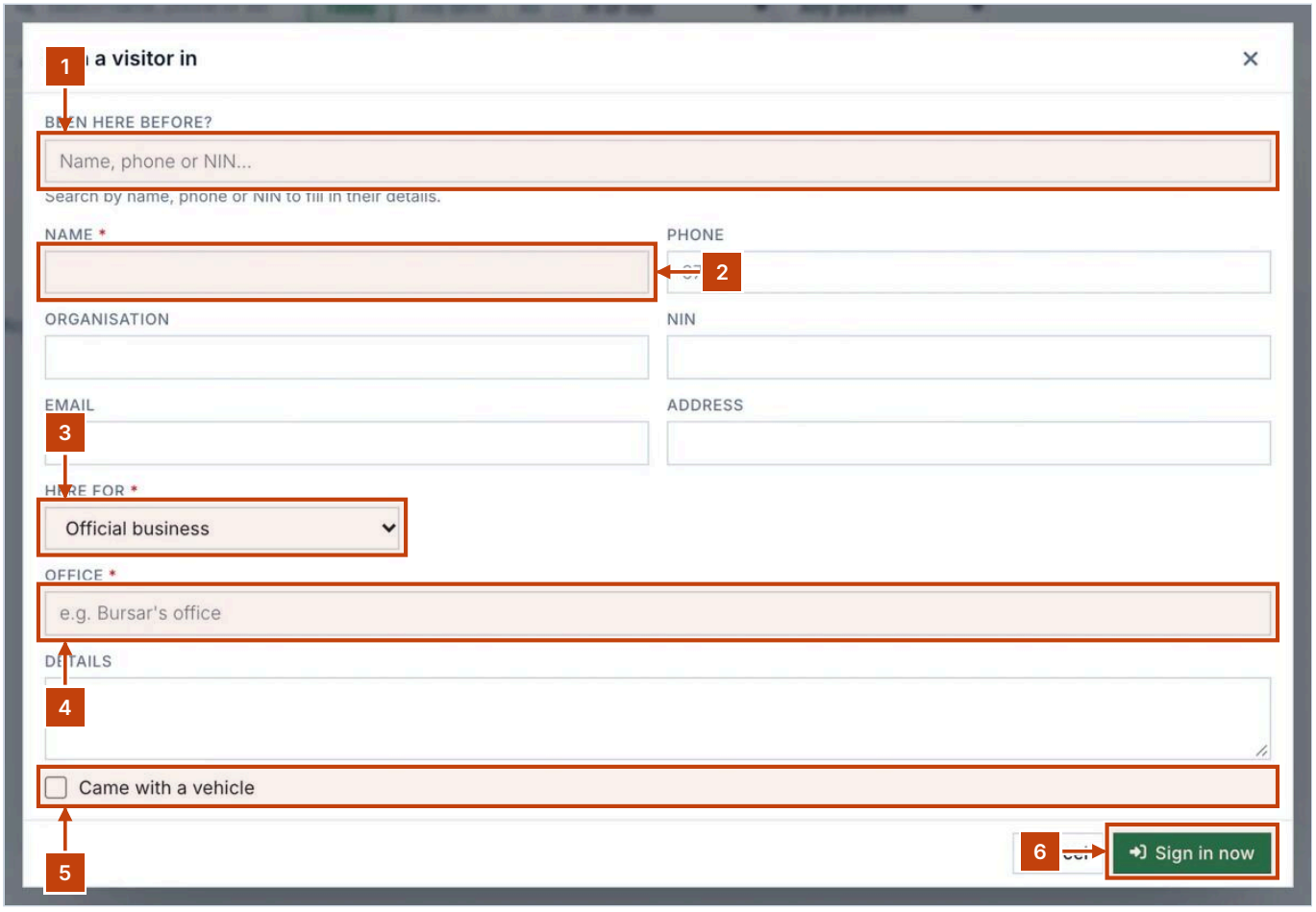
For: School administrator · app.schooldynamics.ug/help/facilities/visitors

The visitors' book keeps everyone who comes to the school: who they are, who or what they came for, when they came in and when they left. Open it from **Facilities › Visitors**. There are two tabs: **Visit log** (the visits) and **Visitors** (the people).

Before you start

The receptionist, security, the gate keeper and the school administrator can use the visitors' book.

Sign a visitor in



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1. Been here before? Find them by name, phone or NIN
2. The visitor's name
3. What they came for
4. Which office (or the person they came to see)
5. Tick it to record the vehicle's number plate
6. Sign them in at the time now

1. On the **Visit log** tab, press **Sign a visitor in**.
2. If they have been here before, type their name, phone number or NIN in **Been here before?** 1 and click them. Their details fill in. (Press **Not them?** if you picked the wrong person.)
3. Otherwise, type the **Name** 2, and the phone, organisation, NIN, email and address you have.
4. Choose what they are **Here for** 3: *Official business*, *A member of staff*, *A student* or *Something else*.
5. Fill the box that appears 4: the **Office**, the **Member of staff**, the **Student** (type a name or student number and click them), or the **Reason**.
6. If they came with a vehicle, tick **Came with a vehicle** 5 and type the **Vehicle registration**.
7. Press **Sign in now** 6.

The visit is signed in at the time now, and appears at the top of the log with **Still in**.

Sign a visitor out

When the visitor leaves, press **Sign out** on their row and confirm. The time out is the time now.

The eye button opens the whole visit: contacts, what they came for, the times, the vehicle, and who logged it. A visitor still in can be signed out from there too, with **Sign out now**.

> TIP
>
> Before the gate closes, choose **Still in** in the *In or out* list. Anyone left there has not been signed out.

Read the log

The top of the **Visit log** counts the visitors **On the premises** (signed in today and not yet out), the **Visits today** and the **Visits this term**.

The log shows **Today** to start with. Switch to **This term** or **All**. Search by name, phone, vehicle or organisation, or narrow it by *In or out* and by purpose. **Export** downloads the visits the filters show, as a spreadsheet.

Click a visitor's name for a quick view: how many times they have come, when they last came, and their last visits.

The visitors

The **Visitors** tab lists every person who has visited, with their phone, organisation, number of visits and last visit. A visitor is added the first time they sign in. Search by name, phone, organisation or NIN.

Full record (in the quick view) opens the visitor's page with every visit. Press **Edit** there to correct their details, then **Save visitor**.

> GOOD TO KNOW
>
> When a visitor signs in, the school looks for them among its own visitors by phone number, then email, then NIN. If it finds them, the visit joins their record and their details are brought up to date; a field left blank on the visit does not wipe what is already known. If not, a new visitor is added.

Visits from the phone app

The gate can sign visitors in on the phone app, even without internet; the app sends the visits when it is back online. They appear in the same log, with a signature when the visitor signed on the phone.

QUESTIONS

Do I have to type a returning visitor's details again?
No. In **Been here before?**, type their name, phone number or NIN and click them. Their details fill in.

Can I change the time a visitor came in?
No. Signing in and signing out take the time from the clock at that moment.

Who can see the visitors' book?
The receptionist, security, the gate keeper and the school administrator.

13

Parents

What parents can do: sign in with a code, see fees and report cards, pay online, and use the parents' app.

For parents, and for the staff who help them: how a parent signs in, what they see, and how they pay and receive report cards.

What parents can do	4 min
Sign in to the parents' page with a code	4 min
The parents' app	2 min
Pay school fees online	4 min
Report cards for parents	3 min

What parents can do

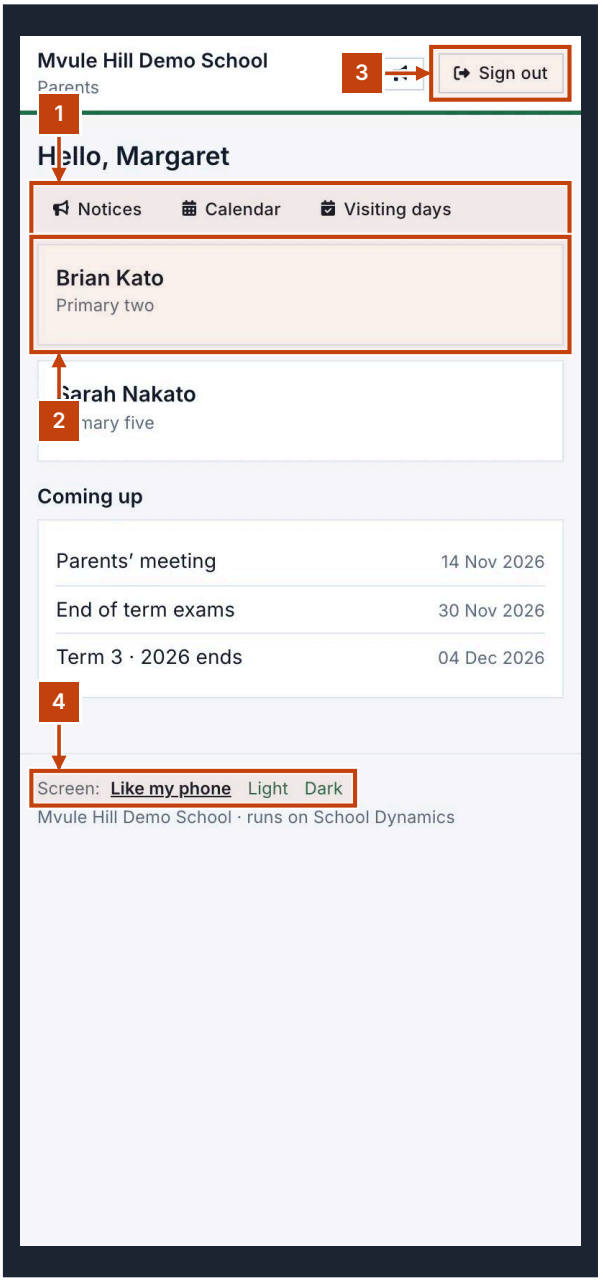
The parents' page on the web: each child's fees and receipts, report cards, attendance, timetable and things to bring, the school's notices and calendar, and visiting days.

For: Parent, Secretary · app.schooldynamics.ug/help/parents/what-parents-can-do

The parents' page is the school's own web page for parents. It works in the browser of any phone, with no app and no password: the parent types their phone number and gets a sign-in code (see Sign in to the parents' page with a code).

Parents see only their own children, and only what the school has chosen to share.

Your children



The demo school · invented names and figures

1. The school's notices, calendar and visiting days.
2. One card for each child: open it for fees, report cards and more.
3. Sign out when you finish, especially on a shared phone.
4. A light or dark screen.

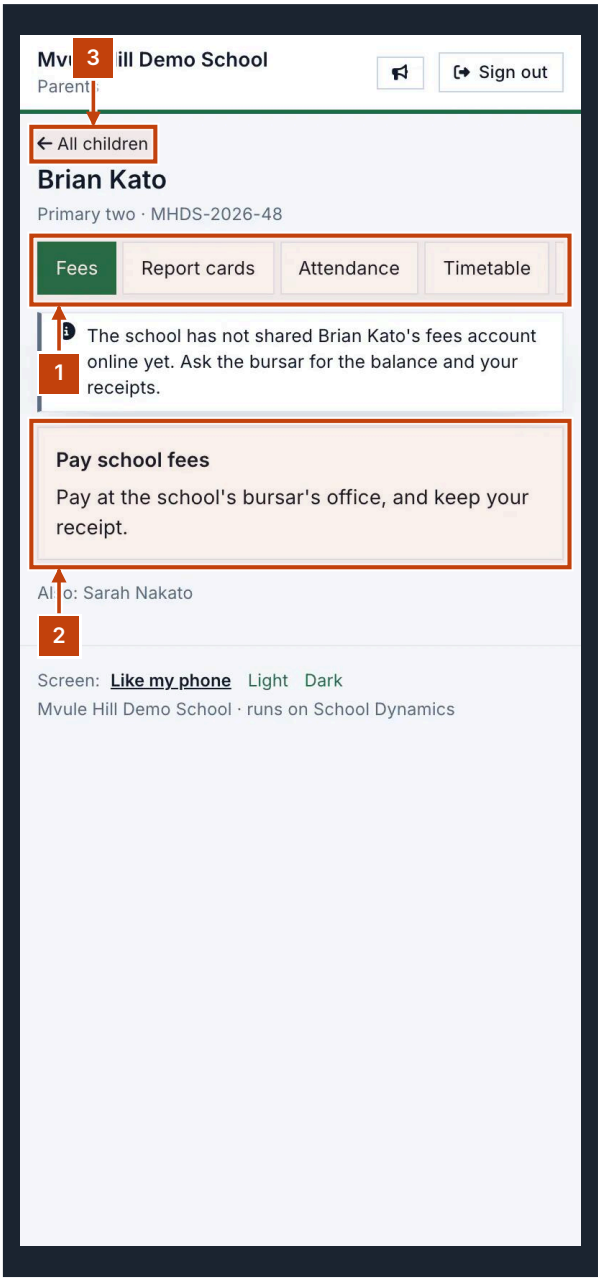
The first page says *Hello* and the parent's first name. At the top 1 are **Notices** (with how many are new), **Calendar** and **Visiting days**.

Below is one card for each child 2: the name and class, and short notes when they apply:

- **Owes UGX ...** or **Fees cleared**, when the school shares the child's fees account;
- how many report cards can be opened;
- how many items are still to bring;
- the next instalment of a payment plan, and when it is due.

A child who has left the school says *no longer at the school*. Under the cards, **Coming up** lists the next three dates on the school calendar in the coming month.

A child's page



The demo school · invented names and figures

1 The parts of the child's page: fees, report cards, attendance and more.

2 How to pay this child's fees.

3 Back to all your children.

Each child's page has six parts 1. **Also:** at the bottom opens the same part for a brother or sister. **All children** 3 goes back.

Part	What it shows
Fees	What is still to pay (or in credit), billed and paid, and the **Statement (PDF)**. Then **Pay school fees** 2 : how to pay. Then the payment plan if there is one, every receipt as a PDF, and the latest lines of the account.
Report cards	Each report card the school has released, to open as a PDF. See Report cards for parents.
Attendance	This term's share of roll-calls present, how many present and absent, and the days marked absent.
Timetable	The class's lessons for each day: subject, teacher and times.
To bring	The term's requirements list: what was brought, and what is still missing (and what it costs in cash instead, where the school allows it).
Records	Ask the school for a copy of everything it holds about the child.

If the school has not shared the fees account, the **Fees** part says *The school has not shared (the child)'s fees account online yet. Ask the bursar for the balance and your receipts.* The **Pay school fees** box still shows how to pay. See Pay school fees online.

Asking for a copy of a child's record

1. Open **Records**.
2. Add a note if you want, in **Anything to add (optional)**.
3. Press **Ask for a copy**.

The page says when the school will answer: the law gives it 30 days. When the copy is ready, **Download** appears beside the request, until the date shown. If the school declines, the page shows its reason. To correct something on the record, contact the school.

Notices and the calendar

Notices lists what the school has published for parents, newest first; a notice not yet opened says **New**. Opening it tells the school it was read.

Calendar lists the dates the school has put on its calendar for parents, for the coming months.

Visiting days

Visiting days lists the coming visiting days, with the school's rules for visitors.

1. Tick the children you are visiting.

2. Choose a **Time**. Each time says how many places are left, or *full*, or *passed*.
3. Type how many **People coming** and the **Name of the person coming**.
4. Press **Book this time**.

Your booking then shows as *Your time: ….* **Cancel booking** is there until the day before. Some visiting days are for the families of boarders only. See Visiting days.

Screen, and signing out

At the bottom of every page, **Screen:** chooses **Like my phone**, **Light** or **Dark**.

Sign out is at the top right. The page says *You have signed out.* On a shared phone, always sign out.

If the school's account is paused, the parents' pages close and say *The school's pages are paused*: please contact the school.

For staff

What parents see comes from the school's own records. When a parent says something is missing:

Missing	What the school does
A child	Link the child to that parent (see Parents and guardians). The page says *No child is linked to you at this school.*
The fees balance, receipts and statement	Share the account: on **Student accounts**, tick it and press **Show balance to parents** (see Student accounts).
A report card	Release the class's report cards; a child who owes fees has the card withheld (see Report cards for parents).
A notice or a date	Publish the notice for parents or everyone (see Notices and events); put the date on the calendar for parents (see School calendar).
The timetable	Make the class's timetable active for this year (see Timetable).
Things to bring	Set the term's requirements list (see Requirements).

Parents' requests for a copy of a record arrive under **Record requests** (see Record requests).

QUESTIONS

Do parents need the app?
No. The parents' page works in any phone's browser, with no app and no password. The app shows the same things, with notifications.

A parent says the fees part is empty. Why?

The school has not shared that child's fees account with parents yet. The bursar shares it on **Student accounts** with **Show balance to parents**.

One child is missing from a parent's page. Why?
The child is not linked to that parent at this school. The office links them on the child's record (see Parents and guardians).

Can a parent see another family's child?
No. A parent sees only the children linked to them, in their own school. Any other child is simply not found.

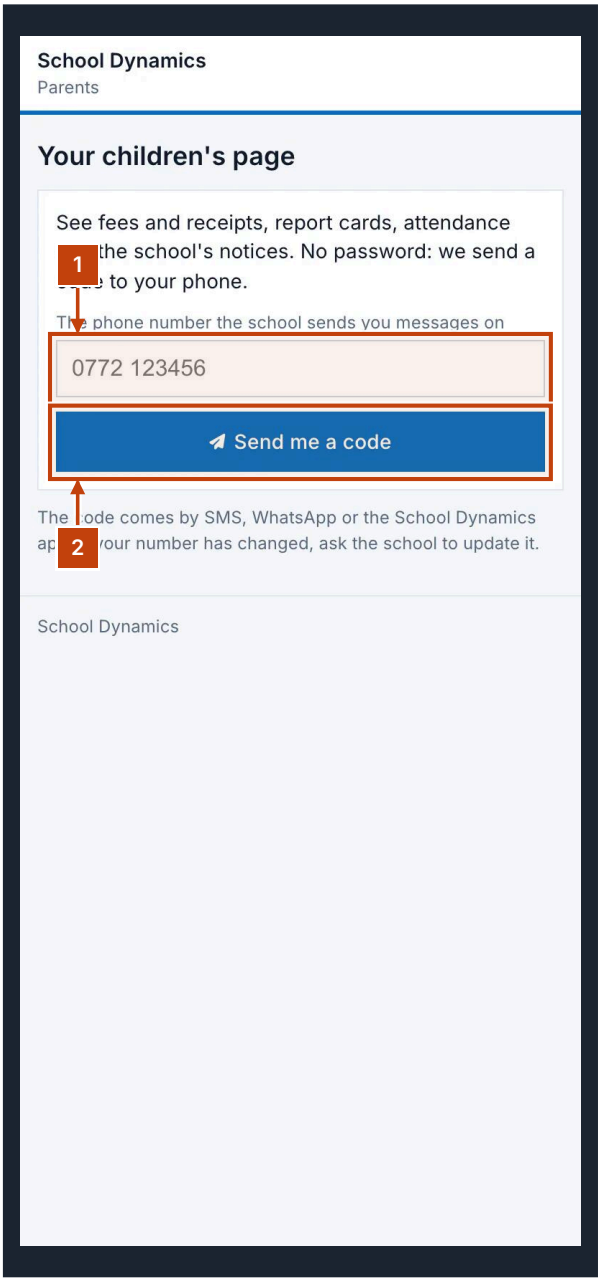
Sign in to the parents' page with a code

How a parent opens the parents' page with a phone number and a six-digit code, what each message means, and what staff check when no code arrives.

For: Parent, Secretary · app.schooldynamics.ug/help/parents/signing-in-with-a-code

The parents' page has no password. Each time, the parent types the phone number the school has for them, and the school sends a sign-in code to that phone: by SMS, by WhatsApp, or in the School Dynamics app.

Sign in with your phone number



The demo school · invented names and figures

1 The phone number the school sends you messages on.

2 A six-digit code comes to that phone.

1. Open the parents' page: **app.schooldynamics.ug/parents**, the parents' page on your school's own web address, or the link the school sent you.
2. Type **The phone number the school sends you messages on** 1, for example 0772 123456.
3. Press **Send me a code** 2. The page **Enter the code** opens: *If (your number) is on the school's records, a 6-digit code is on its way. It works for 10 minutes.*
4. Type the six digits in **Code**.
5. Press **Open my children's page**. Your children's page opens.

If the same number is on more than one family's record (for example, children in two schools), **Which family?** asks which one to open. Each choice names the children and the school. Press **Open** on the one you want.

You stay signed in for up to 12 hours, or until you press **Sign out**.

From the school's link

The school may send you a link to your own page in a message. Open it, check the number it names (*We will send a code to ..., the number (school) has for you.*) and press **Send me a code**. Then go on from step 4 above.

If the link says *This link does not work any more*, sign in with your phone number instead.

No code?

- Wait a minute, then press **No code? Send another**.
- Check the number: press **Use another number** and type it again.
- If your number has changed, ask the school to update it. The code can only go to the number the school has.

> **GOOD TO KNOW**
>
> The page says the same thing for every number, whether or not it is on a school's records. That way, nobody can use it to find out who is a parent at the school.

What the messages mean

You see	What to do
Enter a Ugandan phone number, for example 0772 123456.	Check the number and type it again.
We sent a code a moment ago. Please wait a minute before asking for another.	Wait a minute.
Too many codes have been asked for this number. Please try again in an hour.	Five codes in an hour is the most. Try again later.
That code is not right. 3 tries left.	Check the digits. After five wrong tries the code stops working: ask for a new one.
That code has expired. Ask for a new one.	A code works for 10 minutes. Press **No code? Send another**.
That code has been used. Ask for a new one.	Each code works once.
Your school has not opened the parents' page. Please contact the school.	The school has switched off the sign-in code message.
You asked the school not to send you messages, so no code can be sent. Please contact the school.	Ask the school to record that you agree to messages again.
Your school cannot send messages at the moment. Please contact the school.	The school's messaging is off or out of credit.
The school has no phone number for you that can get a code. Please contact the school.	The school must add your number to your record.

> ⚠ CAREFUL
>
> Never give the code to anyone, even someone who says they are from the school.

For staff: when a parent gets no code

Check these, in order:

1. **The number.** The parent's phone number must be on the parent's record, as the number the school texts them on (see Parents and guardians).
2. **The message is on.** Under **Settings › Messaging**, tab **Templates**, the message *Parents' page sign-in code* must be on. It is on unless someone switched it off. Switched off, no parent of the school can

sign in.

3 **The school can send.** Messaging must be switched on for the school and the SMS wallet must hold enough credit: each code is a message the school pays for (see How SMS works).

4 **The parent's consent.** A parent who said no to every kind of message gets no code (see **Settings › Messaging**, tab **Parents' consent**).

To send every parent the link to their own page, open **Settings › Messaging**, tab **Templates**, and press **Send now** on *Your children's page*. Each parent gets a private link; they still sign in with a code. See Automatic messages.

> **TIP**
>
> Many parents at once? Send *Your children's page* one class at a time, so the office can answer questions as they come.

QUESTIONS

Does a parent need a password?
No. The parents' page uses a code sent to the parent's phone each time. The phone app uses a password.

The parent changed their phone number. What now?
The office puts the new number on the parent's record (see Parents and guardians). Codes only go to the number the school has.

Is the code free for the parent?
The school pays for the message, as for any message it sends. The parent pays nothing.

Can staff see a parent's code?
No. The code is hidden in the school's message log as soon as it has gone.

The parents' app

What parents see in the School Dynamics phone app, how they sign in with a password, and how the app differs from the parents' page on the web.

For: Parent, Secretary · app.schooldynamics.ug/help/parents/parents-app

The School Dynamics app shows parents the same things as the parents' page, on their phone, with notifications when something happens.

Get the app and sign in

1. Install **School Dynamics** from Google Play or the App Store. It is free. The **Get the app** page has the store buttons.
2. Sign in with the phone number your school has for you and your password. A child's SchoolPay code also works in place of the phone number, with your own password.
3. If your children are in more than one school with the same number and password, the app lists each school: choose the one to open.

No password yet? The school's office sets one on your record. If the app says you are using the default password, ask the school to set a new one.

> **TIP**
>
> The app's sign-in is separate from the parents' page on the web. A parent with no password can always use the parents' page, which needs only a code sent to their phone (see Sign in to the parents' page with a code).

What parents see in the app

For each of their children at the school:

- **Fees**: the balance, a statement and receipts, the next instalment of a payment plan, and how to pay. Only when the school shares the child's fees account with parents, as on the web.
- **Report cards**: those the school has released, when the fees are cleared. Progressive-test reports too.
- **Attendance**: this week's days and the term's rate.
- **The timetable** and today's lessons.
- **Things to bring**: what is still missing from the term's requirements list.
- **Assignments**, and the school's notices, calendar and learning resources.
- **Bus trips**, for a child who uses the school's transport.
- **Pocket money**: the balance, and a daily limit for the canteen that the parent can set.
- **Visiting days**: book a time, and cancel it until the day before.

Notifications

The app can bring the school's messages as notifications: fees, attendance, report cards, notices and transport. Each kind can be turned on or off for the phone.

Open the parents' page from the app

The app can open the parents' page in the phone's browser, already signed in, with no code to type. The link works once, for two minutes.

For staff

- A parent's sign-in to the app is the parent's record under **Parents**: their phone number and password (see Parents and guardians).
- The app follows the same rules as the parents' page: fees only when shared with parents, report cards only when released and the fees are cleared (see What parents can do).
- A parent can ask in the app for their account to be deleted. The request comes to the school's leaders under **Account deletions**.

QUESTIONS

What is the difference between the app and the parents' page?
They show the same children by the same rules. The parents' page works in any browser with a code and no password. The app needs a password, and sends notifications.

A parent forgot their app password. What does the school do?
The office sets a new password on the parent's record under **Parents** (see Parents and guardians). Meanwhile the parent can use the parents' page with a code.

My children are in two schools. Do I need two sign-ins?
No. If both schools have your number and the same password, the app lists each school and you choose which to open.

Pay school fees online

How a parent pays a child's fees by mobile money or card on the school's secure payment page, gets the receipt, and the other ways to pay.

For: Parent, Bursar · app.schooldynamics.ug/help/parents/paying-online

Schools that take payments online have a secure page where a parent pays a child's fees by mobile money or card. The money goes to the school through Pesapal, and the payment is entered on the child's fees account.

Where to find it

- On the parents' page, open the child, then **Fees**. The box **Pay school fees** has **Pay online** when the school takes payments online.
- The school may also send you a pay link for one child. It works for a limited time; if it no longer opens, ask the school for a new one, or use **Pay online** on the parents' page.
- In the School Dynamics app, the child's fees show how to pay too.

Pay

1. Press **Pay online**, or open the link. The page **Pay school fees** names the child, the class and the student number. When the school shares the child's balance with parents, it also shows what is owed.
2. Type the **Amount to pay (UGX)**. The page says the smallest and the largest amount it takes. When the balance is shown, the amount owed is already filled in: change it to pay part.
3. Type **Your name**, as the payer.
4. Type the **Phone number** you will pay from with mobile money.
5. Type an **Email (optional)** if you want Pesapal's own receipt by email.
6. Press **Continue to pay with Pesapal**. Pesapal's page opens: pay there by mobile money or card.

After paying, Pesapal sends you back to the school's page for this payment. It shows the amount, the time and a reference, and what became of it:

The page says	What it means
Payment received. Thank you — (the child)'s fees account is updated.	Done. Press **Download the receipt** for the school's receipt.
Your payment is being confirmed.	Pesapal has not answered yet. The page checks again on its own; it usually takes a few minutes.
Pesapal confirmed the payment; the school is checking it before it shows on the account.	Keep your mobile money message. The school will put it on the account.
The payment did not go through. No money was taken for it.	Try again from the link or the parents' page.
This payment was reversed by Pesapal.	The money went back. Contact the school if you did not expect this.

> **TIP**
> Keep the payment's page open, or save its address: it is where you come back for the receipt.

When the page says no

You see	What to do
Online payment is not available for this school yet.	Pay through SchoolPay with the code the page shows, or at the bursar's office.
Enter an amount between ... and	Change the amount.
Enter the phone number you are paying from.	Fill in **Phone number**.
That email address does not look right. Leave it empty if you have none.	Correct the email, or empty the box.
The payment could not be started. Please try again in a few minutes.	Wait a little and try again.
This student has no fees account yet. Please pay at the school.	The school has not opened the child's fees account. Pay at the school.

Other ways to pay

The **Pay school fees** box always says how the school takes fees:

- **SchoolPay**: *Pay with MTN MoMo, Airtel Money or M-Sente (School fees, then SchoolPay), or at a SchoolPay bank, with the payment code below.* The box shows the child's **SchoolPay payment code**. See SchoolPay.
- **At the school**: *Pay at the school's bursar's office, and keep your receipt.*

Every payment the school records shows on the child's **Fees** part, with its receipt, when the school shares the account with parents.

For staff

- The school connects its own Pesapal account and tests it under **Settings › Online fees payments**. Until it is connected, live and tested, parents see no **Pay online** button. See Online payments.
- To send one parent a pay link, open **Fees & finance › Collections › Online payments** and press **Pay link for a student**. Choose the student, then **Copy** the link and send it. The dialog says how many days it works.
- Every online payment is listed on the **Online payments** page.
- A parent sees the balance on the pay page only when the child's account is shared with parents (**Show balance to parents** on **Student accounts**).

QUESTIONS

Is it safe to pay on this page?
Yes. The money is paid on Pesapal's own secure page, straight into the school's account. School Dynamics never sees your mobile money PIN or card details.

I paid but the page still says it is being confirmed. What do I do?
Wait a few minutes: the page checks again on its own. Keep your mobile money message. If it does not change, contact the school's bursar with the reference shown on the page.

The school does not offer online payment. How else can I pay?
Through SchoolPay with the child's payment code, or at the bursar's office. The **Pay school fees** box on the parents' page says which the school takes.

Can I pay part of the balance?
Yes. Type any amount between the smallest and largest the page allows.

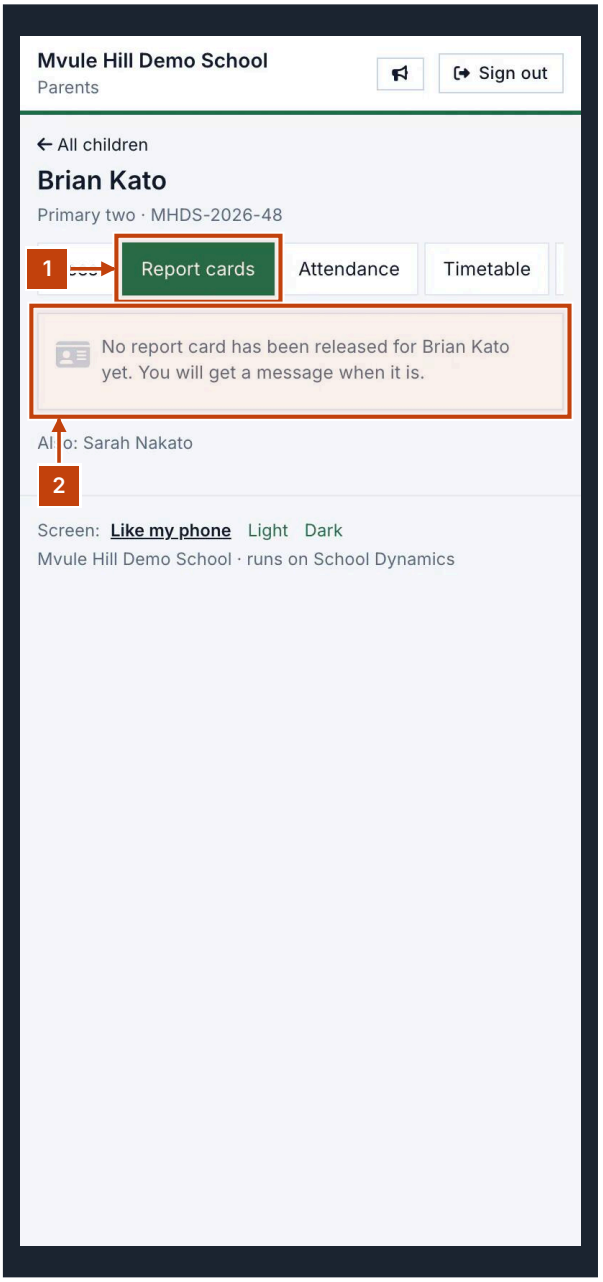
Report cards for parents

How a parent opens a child's report card on the parents' page or from the school's message, why a card can be withheld for fees, and how to check a printed card is genuine.

For: Parent, Secretary, Director of studies · app.schooldynamics.ug/help/parents/report-cards-for-parents

A child's report card reaches the parent once the school has released it. The parent opens it on the parents' page, in the app, or from the link in the school's *Report card ready* message.

Open a report card



The demo school · invented names and figures

1 The child's report cards.

2 Each released card: open it, or see why it is withheld.

1 On the parents' page, open the child.

2 Open **Report cards** 1.

3 Each card the school has released is listed with its title, the term and the class 2. Press **Open the report card**. The card opens as a PDF, the same one the school prints.

If no card is listed, the page says *No report card has been released for (the child) yet.*

When a card is withheld for fees

A released card stays closed while the child owes school fees. Instead of the button, the card says:

> *Report card is locked. Outstanding school fees of UGX … must be cleared before the report card for this student can be viewed. Please contact the school bursar.*

How to pay jumps to the **Pay school fees** box below (see Pay school fees online). As soon as the fees are cleared, the same card opens. Nothing more needs to be done.

From the school's message

When the school releases a class, it may send the *Report card ready* message with a private link to the child's card. The link opens a page that names the child, the term and the class:

- **Open the report card** shows it; **Save it on this phone** downloads it.
- *Withheld for school fees*: the same fees message as above. Once the fees are cleared, this same link opens the card.
- *This report card is being corrected*: the school took it back to correct something. A new message comes when it is ready again.
- *This link has expired*: links work for a set number of days, which the page says. Open the card on the parents' page or in the app instead.

The link is for that parent alone. Do not forward it.

Check that a printed card is genuine

Every report card printed by School Dynamics carries a square code (a QR code), with its code printed under it. Scan it with a phone's camera. The page that opens says:

- *This report card is genuine*, with the school, the student's initials, the class, the term and the day it was issued. It never shows the marks or the full name;
- *This card was issued, then corrected*: ask the school for the corrected card, whose code is different;
- *We cannot find this report card*: check the code was typed exactly as printed, or ask the school that issued it.

> **GOOD TO KNOW**
>
> The check page never shows marks. To be sure the marks on a paper card are the school's, compare it with the copy the parent received, or ask the school.

For staff

- Parents see a class's report cards only after it is **released** (see Checking, approving and releasing). What a parent sees, card by card, is in What parents see.
- The fees gate: any amount owed withholds the card from the parent. Staff always see every card.

- The *Report card ready* message goes from the release page, or from **Settings › Messaging**, tab **Templates**, with **Send now**.
- Each time a parent opens a card on the parents' page, the school's audit log notes it.

QUESTIONS

Why can I not open my child's report card?
If it says *Report card is locked*, the child still owes school fees. Once the fees are cleared, the same card opens. If there is no card at all, the school has not released it yet.

I paid the fees. When does the card open?
As soon as the payment is on the child's fees account and nothing is owed. Ask the bursar if it has not been entered yet.

Can I open it from the school's text message?
Yes. The *Report card ready* message carries a private link to the card. It works for a set number of days; after that, use the parents' page or the app.

How do I know a printed report card is real?
Scan the square code on the card with your phone. The page says *This report card is genuine*, with the school, the class and the term, or that it cannot find it.

14

Leaders and owners

The dashboard, alerts that need you, and running several schools as a group.

For head teachers, directors and owners: the dashboard that shows the school at a glance, the alerts that need a decision, and the view across a group of schools.

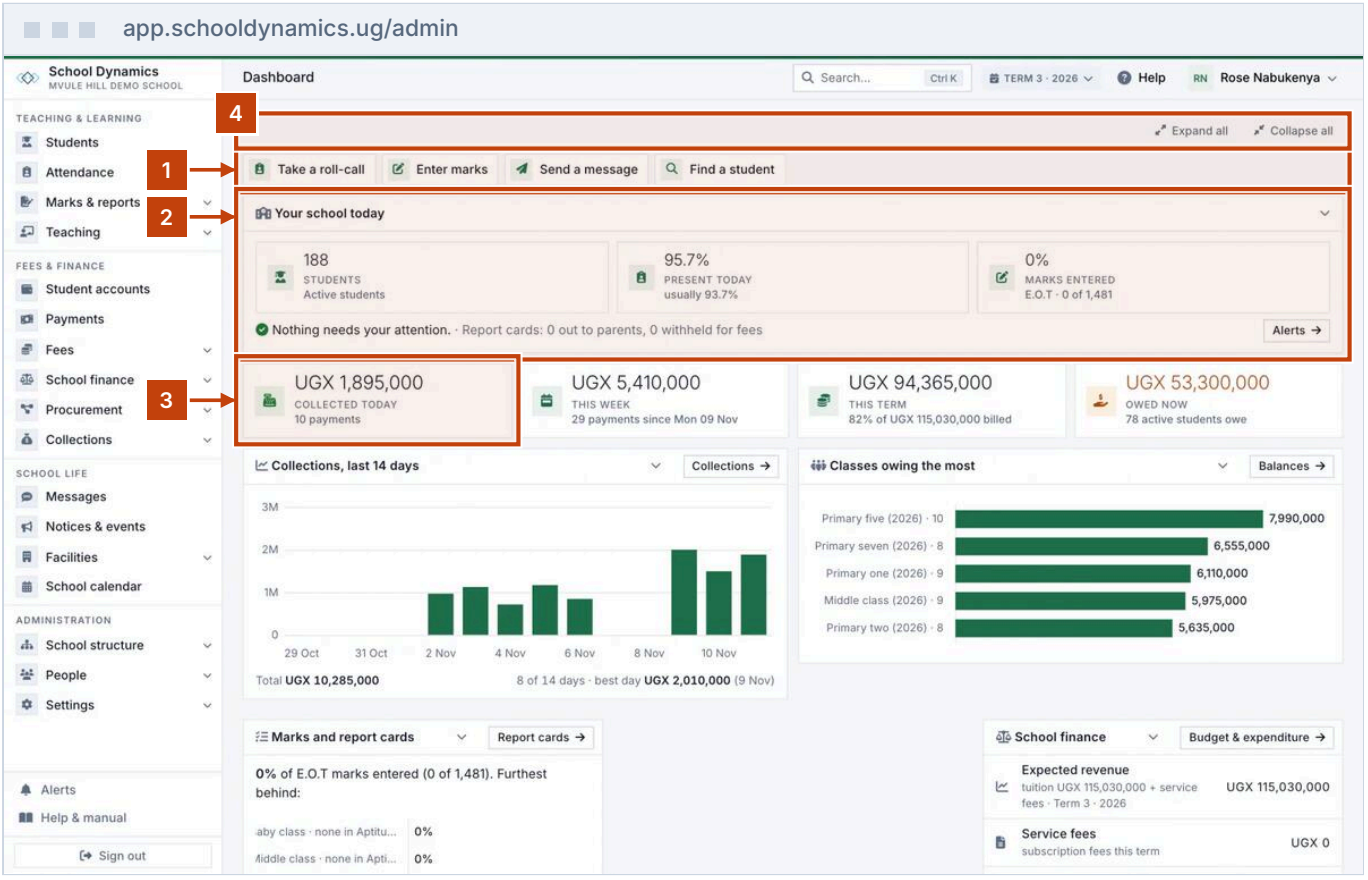
The dashboard	4 min
Alerts that need you	4 min
Run several schools as a group	4 min

The dashboard

The first page after signing in. Your most used actions, and the figures your role acts on, from today's attendance and fees collected to marks entered and alerts.

For: Head teacher, School owner, Bursar, Director of studies, Teacher · app.schooldynamics.ug/help/leaders/dashboard

The dashboard is the first page after you sign in. It opens on what to do and what to look at, for your role: no greeting, no clutter. Go back to it at any time by clicking the school's name at the top of the menu.



The demo school · invented names and figures

1. Your most used actions: each opens its dialog or page.
2. Your school today: students, attendance, marks and what needs you.
3. Fees: collected today, this week, this term, and owed now.
4. Fold or open every card at once.

Quick actions

The buttons at the top 1 are the jobs your role does most, up to four of them; any more are under the ··· button beside them. Each one opens its dialog or page straight away:

Record a payment · Admit a student · Take a roll-call · Enter marks · Send a message · Sign in a visitor · Sick-bay visit · Lend a book · Find a student

You see only those your roles allow, in that order.

Your school today

The head teacher, deputy and school administrator start with **Your school today** 2 :

- **Students**: active students, and how many joined this term.
- **Present today**: the share of students present in today's closed class roll-calls, against what is usual for the school. It is marked in amber when today is more than 5 points below the usual. *No roll-call closed yet* means none is finished today.
- **Marks entered**: how far marks entry is for this term's exams.
- A line with how many things need attention (and how many to **act now**), and how many report cards are out to parents or withheld for fees. **Alerts** opens the list (see Alerts).

Fees at a glance

Everyone who may see fees (the school administrator, head teacher, deputy, bursar and finance officer) gets the fees figures next 3 :

- **Collected today**, **This week** and **This term** (with the share of the term's bills paid);
- **Owed now**: what active students owe, and how many owe;
- **Collections, last 14 days**: a small chart of each day's payments;
- **Classes owing the most**, which opens the balances report.

The cards

Below come cards for your work, the most useful for your role first. The button on a card's title bar, such as **All alerts** or **Report cards**, opens its full page.

Card	Shows	Who sees it
Needs attention	The six most pressing alerts for you	Everyone, except leaders (their alerts are in *Your school today*)
Marks entered this term	Each exam's progress, with a link to the report settings	Director of studies (leaders have it in *Your school today*)
Marks and report cards	Marks entered, the classes and teachers furthest behind, report cards out to parents, withheld for fees and not ready	Director of studies, leaders
Class attendance	Present today and this week, and who missed most this week	Those who see students (not leaders, who have it in *Your school today*)
Students	Active students by class, students with no class, online applications waiting	Those who see students (not leaders)
Collections by channel	Today's and this week's payments by channel, SchoolPay sync, promises to pay and plan instalments overdue	Bursar, finance officer, school administrator
Promises to pay	Promises overdue and due this week (only while one is open)	Those who see fees
School finance	Expected revenue, spending against the budget, stock held, bursaries this term, students cleared, accounts not yet verified	Those who see fees
My class today	Your class's roll-calls today and marks still due	A class teacher
My lessons today	Today's lessons and invigilation, and **My week**	Anyone with lessons on this year's timetable
My marking	Marks due and work waiting to be marked	Teachers who teach a subject
Waiting for your review	Lesson plans and schemes of work sent for review	Leaders, director of studies
Messages	The SMS wallet, and messages sent and failed this month	Those who send messages
Around the school	Visitors on site, sick-bay visits, library loans overdue, hostel beds free, store items low	The staff who look after each

Card	Shows	Who sees it
Transport	Students riding, routes, vehicles and trips this month	Those who manage transport
Semester enrolment	Who is enrolled this semester	Universities only

A card with nothing to show stays out of the way: **Promises to pay** appears only while a promise is open.

Fold the cards you do not need

Click a card's title to fold it away; click again to open it 4. Folded cards stay folded on this computer. **Collapse all** and **Expand all** fold or open every card at once.

Notices at the top

The dashboard puts the school's urgent notices above everything:

- *This school has no active term*: fees, roll-calls and marks have nowhere to go until one is set (see Years and terms).
- A new school's set-up checklist, until it is done (see First-week checklist).
- A licence bill that is due, for the people who handle it, with **See the bill** (see Licence and billing).

> **TIP**
>
> The cards load one by one after the page opens, so the page is quick even on a slow connection. A grey box is a card still on its way.

QUESTIONS

Why does my dashboard look different from the bursar's?
Each card shows only to people whose roles can act on it, and each role sees its own cards first. A head teacher starts with **Your school today**, a bursar with collections, a teacher with their lessons and marking.

Are the figures live?
They are worked out from the school's records each time the page loads, and may be a few minutes old. Open a card's page for the up-to-the-minute list.

A card I do not need takes up space. Can I hide it?
Click its title to fold it away. It stays folded on this computer until you open it again. **Collapse all** folds every card.

The dashboard says the school has no active term. What do I do?
Set the term the school is in now as the active one under **Academic years** (see Years and terms). Until then, fees, roll-calls and marks have nowhere to go.

Alerts that need you

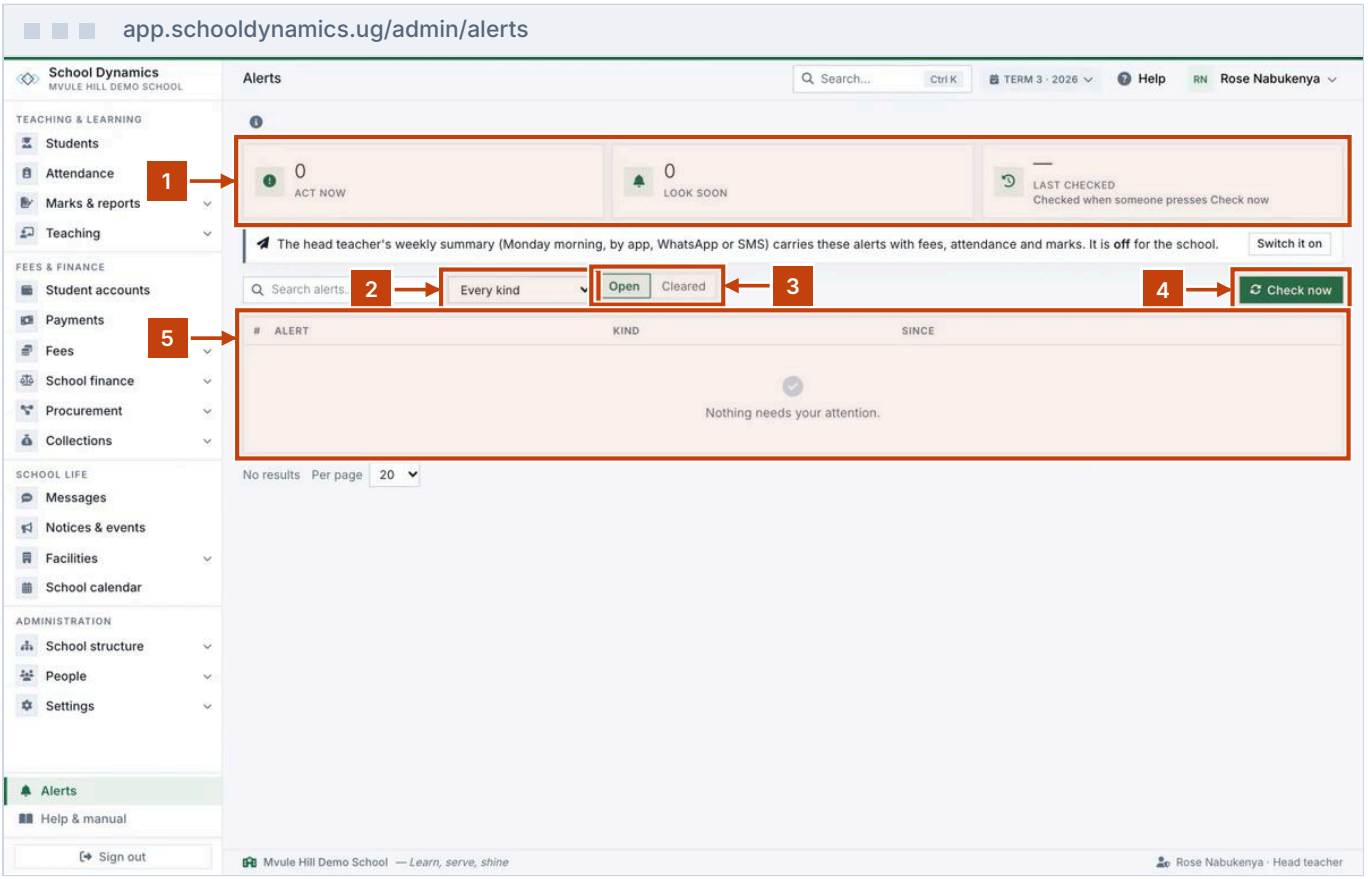
Alerts: what the school's own figures say needs attention — students at risk, marks or roll-calls behind, fees collections, SchoolPay and the SMS wallet — and how to act on each.

For: Head teacher, School owner, Director of studies, Bursar, Teacher · app.schooldynamics.ug/help/leaders/alerts

An alert is something the school's own figures say needs attention: a class far behind in marks, a roll-call not taken this morning, a student whose attendance and marks are both falling. Each alert says *why*, in figures you recognise, and has a button to the page that fixes it.

Open **Alerts** at the foot of the menu. The number beside it is how many are open for you. The dashboard shows the most pressing ones too (see The dashboard).

Read the page



The demo school · invented names and figures

1. How many to act on now, how many to look at soon, and when the school was last checked.
2. Show one kind of alert.
3. Open alerts, or those cleared in the last 30 days.
4. Check the school now (head teacher and administrator).
5. Each alert, most pressing first, with the button that fixes it.

At the top 1 :

- **Act now**: the most urgent;
- **Look soon**: worth a look this week;
- **Last checked**: when the school was last checked, and how often.

The list 5 puts the most pressing first. Each row has the alert, its first reason, its kind and since when. Its button (**Enter the marks**, **Take a roll-call** …) opens the page that fixes it. The eye button opens the alert's quick view: every reason, when it was first seen and last checked, and who it is for.

To narrow the list, type in **Search alerts…**, choose a kind 2, or press **Cleared** 3 to see what was put right in the last 30 days.

The kinds of alert

Kind	When it appears	Who sees it	Its button
Students at risk	An active student shows at least two of three signs: attendance falling (the last two weeks 10 points below the six weeks before, or under 75%), marks dropping (the latest exam's average 10 points below the one before), fees overdue (owes at least UGX 50,000 and nothing paid for 30 days). All three is *Act now*.	Leaders, the director of studies, and the class teacher	**Open the student**
Marks entry behind	A class's share of marks entered for the exam now being entered is 25 points or more below the school's own share.	The director of studies, leaders, and the class teacher	**Enter the marks**
Roll-call not taken	On a school day, after 10:00, a class or stream whose roll-call is usually taken has none today. If no class has one at all, there is one alert for the whole school.	The class or stream teacher, leaders and the director of studies. The alert for the whole school goes to everyone who takes roll-calls.	**Take a roll-call**
Collections behind	From the 7th day of the term: the share of this term's bills collected so far is 10 points or more behind the share collected by the same day of the last three terms.	Those who see fees	**See collections**
SchoolPay	No sync for 24 hours, the last five syncs failed, or payments fetched more than two days ago are still not imported.	Those who see fees	**Open the sync log** or **Import payments**
SMS wallet	The SMS wallet is below its low line.	Those who send messages	**Top up the wallet**

GOOD TO KNOW

Every alert compares the school with itself: this term against its usual pace, one class against the whole school. No outside figures are used.

Act on an alert

1. Press the alert's button, or open its quick view and press the button there.
2. Fix what it is about on that page: enter the marks, take the roll-call, import the payments.
3. The next time the school is checked, the alert moves to **Cleared** on its own.

If the same problem comes back later, the alert opens again as new.

Check now

The head teacher, the school administrator and the school's owner have **Check now** 4. It checks the whole school at once and says what it found: *Checked. 4 alerts open, 2 cleared.* Use it after fixing several things, or when **Last checked** says the school is checked only when someone presses it.

The weekly summary

The head teacher and the school administrator see a note about the head teacher's weekly summary: a message every Monday morning (by the app, WhatsApp or SMS) with the week's figures for students, attendance, fees and marks, and the alerts. It says whether it is **on** or **off** for the school; **Switch it on** or **Change it** opens the message templates (see Automatic messages).

AI suggestions

Where School Dynamics has it set up, the head teacher and the school administrator also see **AI suggestions**. It lets teachers ask for a draft report-card comment, or exam questions on a topic. A person edits and approves every draft before it reaches a report card or the question bank. Only marks, grades, attendance rates, subjects, the class level and topics leave the school's system: never a name, a number or the school's name. Tick **Allow AI suggestions in this school** and press **Save the choice**.

QUESTIONS

How do I close an alert?
Fix what it is about. Alerts close themselves the next time the school is checked and the problem is gone. There is no button to dismiss one.

Why does a teacher see fewer alerts than the head teacher?
Each alert shows to the people whose work it is. A teacher sees those about their own class; leaders and the director of studies see all of them.

How often are alerts checked?
The page says it under **Last checked**: every 30 minutes when the automatic check is on, otherwise when someone presses **Check now**.

Does the alert show how much a student owes?
Only to people who may see fees. Others see *fees overdue* as one of the reasons.

Run several schools as a group

School groups: an owner's schools side by side (students, fees and results), moving between campuses without a second account, and deciding who works where.

For: School owner, Head teacher, Bursar · app.schooldynamics.ug/help/leaders/school-groups

A school group is several schools with the same owner. The group's people see the schools side by side, and staff who work across campuses move between them without a second account.

School Dynamics sets a group up and puts the schools in it. Until then, the page says *There are no school groups yet.*

Before you start

The **School group** entry at the top of the menu shows only to people with a group role:

Group role	Sees
Group owner	Every figure: students, money and results. Decides who works where, and names the group bursar and academic head.
Group bursar	Students and money.
Group academic head	Students and results.

A group role shows the group's figures only, never another school's records. School Dynamics names the group owner.

The schools side by side

Open **School group**. The first tab, **Schools side by side**, shows each school with its own active term. Every figure comes from that school's own reports, and no student is ever named.

- **At the top**: **Active students** across the group (boys and girls), and, for the owner and the group bursar, **Billed this term**, **Collected this term** and **Owed now**. The group academic head sees **Students with results** and **Students to watch** instead.
- **Schools**: one row per school and its term: active students, joined this term, and (owner and bursar) billed, collected, the rate collected and owed now. The last row is the **Group total**. The school you are working in says **Working here**.
- **Collected this term, by channel** (owner and bursar): each payment channel, each school and the group.
- **Results** (owner and academic head): each school's latest results, its average, the performance index, the divisions and the students to watch. A school with no results this term shows its latest earlier ones, marked **Earlier term**.

> **GOOD TO KNOW**
>
> The performance index runs from 0 to 100. For report cards, it is where the average grade sits between the grading scale's worst and best; for the new curriculum, the average score.

Click a school's name, or its eye button, for its quick view: its students, what it collected and is owed, how it was paid, its results and your roles there.

- **Work out again** recalculates the figures now. Otherwise they are kept for a few minutes.
- **CSV** downloads the same figures as a spreadsheet file.

Move to another school

If you hold roles at another school of the group, the top bar has a school switch beside the term.

1. Press the school switch. It lists the group's schools, with your roles in each.
2. Press the school to work in. The dashboard of that school opens.
3. You now work there, with the roles you hold there only: a bursar at home may be only a director of studies at the other campus. The switch says **In** and the school's name, so you do not forget.
4. To go back, open the switch and press your own school (*Your own school*).

The quick view of a school also has **Work in this school**, or **Back to my school**.

> **CAREFUL**
>
> You see one school at a time. Every move is written in both schools' audit logs. If your access is taken away while you are there, you are sent back to your own school on your next page.

Who works where

The group owner has a second tab, **Who works where**.

Give someone access to another school

1. Press **Give access**.
2. In **Person**, type a name and choose the member of staff (from any of the group's schools).
3. In **May work in**, choose the school.
4. Tick the **Roles there**: school administrator, head teacher, deputy head teacher, director of studies, bursar, finance officer or secretary. They hold these roles at that school only.
5. Press **Give access**.

To change someone's roles there, click their name or the pen button. To take the access away, press the bin button and confirm.

Their roles in their own school are set on that school's **Staff** page, not here: *This is (their) own school: their roles there are set on the school's Staff page.*

Name a group role

1. Press **Name a group role**.
2. Choose the **Person** and the **Group role** (group bursar or group academic head).
3. Press **Name the role**.

The bin button on a row removes a group role. Only School Dynamics names or removes the group owner.

QUESTIONS

How do we become a group?
School Dynamics sets the group up and puts the schools in it. Ask support (see Get help), and say which schools and who owns them.

Do I need a separate account for each campus?
No. Your account stays in your own school. The group owner gives you roles at the other schools, and you move between them from the top bar.

Can the group bursar see students' names at the other schools?
No. The group page shows only totals per school; no student is ever named there. To see a school's records, a person needs roles at that school.

Why can I not move to one of the group's schools?
Either you have no role there (*You have no role at that school*), or its licence has expired. The group owner gives roles; the licence is paid by that school.

Glossary

Academic year	The school year, with its own dates, terms and classes (for example 2027). One academic year is active at a time.
Active term	The term the whole school is working in now. New bills, payments, roll-calls and this term's report cards go to it. Only one term is active at a time.
Adjustment	A line staff post to correct an account rather than to bill or receive money, such as a credit, a debit or a new balance. It always carries the reason, and reports count it apart from payments and bills.
Aggregates	The points a subject's grade is worth on the grading scale, usually 1 for the best grade (D1) up to 9 (F9). A student's aggregates are the sum over the subjects that count, so fewer is better.
Alert	Something the school's own figures say needs attention, such as a class behind in marks entry or a roll-call not taken. Each alert says why and links to the page that fixes it. It clears itself once the problem is gone.
Assessment sheet	A one-page count for a class or a stream, of how many students got each division and how many marks got each grade in each subject.
Asset code	The code a fixed asset gets when it is registered, such as ABC-FUR-2026-0007 (school, category, year, number). It is printed on the asset's label and never changes.
Attendance rate	The share of attendance records marked present, as a percentage. One record is one active student on one closed roll-call; late counts as present.
Audit log	The school's record of who changed what in the system, and who opened a child's sensitive records. It cannot be changed from the system.
Automatic message	A message the system sends by itself when something happens or a date comes (a payment, an arrival, a reminder). Every one starts off until the school switches it on.
B.O.T, M.O.T and E.O.T	Beginning of term, middle of term and end of term, the three exams of a term. Each is marked out of 100. A school can rename them in the term's report settings.
Balance	All the lines on a student's account added up, over every term. A minus figure is what the student owes (UGX -150,000 means they owe UGX 150,000); a plus figure is money paid in advance.
Balance brought forward	What a student owed (or had paid in advance) at the end of the last term, shown as a line in the new term. It is matched by a "carried down" line in the old term, so the balance itself does not change.
Budget account	One item under a vote, such as Food stuffs under KITCHEN. Every budget line and every expenditure is filed against a budget account.

Budget line	An amount set aside for one budget account in one term (quantity × unit price). The budget of a vote is the sum of its budget lines.
Bursary	A fixed amount a school credits to a student's account for a term under a bursary scheme (a full or part scholarship). It lowers what the student owes; a termly bursary is awarded again each term.
Clash	Two lessons, or two exam papers, at times that overlap for the same class, teacher, room or invigilator. The system stops a clash from being saved unless you say it is meant.
Class	One class level in one academic year, such as P.4 in 2027, with its class teacher, subjects and students. A school has one class per level each year; groups inside it are streams.
Class record	One line of a student's class history - the class and stream they were in for one academic year. A student has one class a year, and their current class follows their class record in the active year.
Closed books	Books closed up to a day, once a term is agreed by the committee or the auditors. Nothing dated on or before that day can then be added, changed or deleted, except fees.
Comment bank	The school's ready-made report card comments, grouped by aggregates. The system picks one at random from the band a student's aggregates fall in.
Committee pack	The finance committee's workbook in one file: the budget summary, a sheet for each vote, fees expected and the payroll, as Excel or PDF.
Creditor	A supplier the school still owes for something bought on credit. Each credit shows what was owed, what was paid and what is left, and turns Overdue after its due date.
Data processing agreement	The written agreement between the school, which is in charge of its records, and School Dynamics, which keeps them for it. Only the school's owner accepts it.
Demand notice	A letter asking a parent to clear what their child owes by a date. A demand picks the students by their balance and prints one notice for each student who owes; it can also send one SMS.
Descriptor	In competency reports, the word for a learner's level in a subject (for example Basic, Moderate or Outstanding), worked out from the unit scores in ranges the school sets.
Division	The band a student's total aggregates fall in, from Division 1 (the best) to Division 4, then U (ungraded). X means there were too few marks to grade.
Dormitory	A hostel building, seen from the night roll-call. Its boarders are the students holding an occupied bed in it, and it can have a matron and a patron who take its roll-call.

Double entry	Bookkeeping in which every entry is written twice: a debit on one account and an equal credit on another. The two sides of the books therefore always agree.
Duty roster	Who is on which duty (teacher on duty, gate, meals, dormitory and so on) in each week of a term.
Fee structure	The fees each class pays in a term (school fees, lunch, development fund...). When the term is active, each fee is billed once to every active student in the class.
Fees gate	The rule that keeps a report card from a parent while the student owes fees (a fees balance below zero). Staff always see the card.
Fund request	A member of staff's request for money to buy a store item. Finance approves or rejects it; an approved request cannot be changed.
Goods received note (GRN)	The store's record of a delivery on a purchase order, item by item, what was accepted and what was rejected, and why. Only accepted goods can be invoiced.
Grading scale	The table that turns a mark into a grade (for example 80–100 is D1). A school can have several; each term's report cards use one.
Group role	Group owner, group bursar or group academic head. It shows the group's figures across its schools. It is not a role in any one school.
Guardian details	The names and phone numbers of a student's guardian, father and mother, typed on the student's own record. They are used to find the parent account by phone number, or to make one.
In credit	A student whose balance is above zero has paid more than they were billed. The extra stays on the account and counts against the next bills.
Income line	One source of income on the school's income sheet, such as P1–P7 full fees, Transport or Tours. Each term it gets a proposed figure to compare with what came in.
Invigilator	A member of staff who watches a class while it sits an exam paper. A paper can have several, and one of them can be the chief invigilator.
Journal	One entry in the books of account: two or more lines whose debits add up to the same as their credits. Fees, spending, credits and other income write their own journals.
Leave allowance	How many working days of a kind of leave each member of staff may take in a calendar year, for example 21 days of annual leave.
Licence	The school's right to use School Dynamics for a period it has paid for. When a licence bill passes its due date unpaid, the system locks until it is paid.
LIN	Learner identification number. It is optional, and no two students in School Dynamics can have the same one.

Mark row	One student's marks in one subject for the term (beginning, middle and end of term). Teachers can enter marks only once the rows exist.
Message template	One of the school's ready-made messages (payment received, fees balance, report card ready and others), with its words and whether it is on.
Money place	Somewhere the school keeps money in the books: cash at hand, each bank account, mobile money, SchoolPay collections or online collections.
Opening balance	What a student already owed (or had paid in advance) before the school started recording fees in School Dynamics. It is brought onto the account as a line, often from a fees spreadsheet import.
Out of date	A report card made before its marks or its term's settings changed. Its figures no longer match the marks, so it cannot be released until it is made again.
Parent account	A parent's own record and sign-in in School Dynamics, linked to their children. A parent account can have many children; a student is linked to one parent account at most.
Parents' copy	A saved PDF of a student's report card, the one the parents' app opens. It is saved again whenever the class is released.
Parents' page	The school's own web pages for parents, at /parents. A parent sees each child's fees, report cards, attendance and timetable, and the school's notices. They sign in with a code sent to their phone, without a password.
Pay link	A private web address for one student. The parent opens it to pay that student's fees online through the school's Pesapal account. It stops working after a set number of days.
Payment plan	An agreement that a family pays an amount in instalments on set dates. Each instalment shows as paid, due or overdue from the payments that reach the student's account.
Payment voucher	The record of one payment to a supplier against an approved invoice, with how it was paid and the reference. It prints, and the supplier sees it on the portal.
Payroll	One month's pay for every member of staff with a salary: one payslip each, with PAYE, NSSF and Local Service Tax worked out. It goes from draft to approved to paid.
Payslip	One person's pay for one month: basic pay and allowances, then PAYE, NSSF, Local Service Tax and other deductions, and the net pay.
Period	One lesson on the timetable, for example 40 minutes of Mathematics on Monday at 08:00. A teacher's load is counted in periods and hours a week.
Placeholder	A word in square brackets, such as [STUDENT_NAME], that is replaced by each person's own detail when the message is sent.
Pocket money	Money a family leaves with the school for a student to spend, usually at the canteen. It has its own balance and daily limit and never touches the fees account.

Position	A student's place in the class, or in the stream, by total marks. Students with equal totals share a place and the next place is skipped (1, 1, 3).
Programme	A course of study at a university or tertiary school (a diploma or degree), with the semesters it offers and the tuition of each.
Progressive tests	Up to ten short tests (T1 to T10) in each subject during a term, with their own reports, positions and analysis, separate from the term's report cards.
Promise to pay	A parent's promise to pay an amount by a date. It turns kept by itself once the payments made since the promise reach that amount, and overdue if the date passes first.
Purchase order (LPO)	The school's written order to one supplier: the items, the prices, the delivery date and the budget account. A leader who did not write it approves it, then it is sent to the supplier.
Purchase request	A member of staff's written request for goods or services, with rough prices. A head teacher, deputy or school administrator approves it before anything is bought. Numbered REQ-2026-0001 and so on.
Quick view	A small window that opens over a list when you click a record's name. It shows the record's main figures, facts and actions without leaving the list.
Receipt	The printed proof of a payment. Its number is the payment's line number; it shows the amount in words, how it was paid, and the student's fees balance when it is printed.
Reconcile	To confirm that a line on the bank statement is accounted for, either matched to fees receipts or explained with a note (bank charges, a transfer). Who did it and when are kept.
Recovery code	One of the ten codes you are given when you turn on two-step sign-in. Each one opens your account once, when your phone is not with you.
Registration number (reg no.)	The school's own number for a student, printed on letters and ID cards and read by the roll-call scan box. An active student without one gets the school's short name, the year they were admitted and their record number, such as MHDS-2026-1042.
Release	Giving a class's report cards to parents, after the class teacher has checked them and the director of studies or head teacher has approved them. Released marks and comments stay locked until the class is reopened.
Reorder level	The stock level at which a store item needs buying again. At or below it, the item shows as Reorder.
Report settings	One term's choices for its report cards, such as the title, the grading scale, the exams that count, who may enter marks and what the printed card shows.
Request for quotation (RFQ)	An invitation to chosen suppliers to price a list of items before a closing time. Their quotes stay sealed until then, and are then compared side by side.

Reversal	A line that cancels another by posting the opposite amount on the same account and term. Both lines stay on the statement, and a line can be reversed only once.
Reverse auction	A timed contest in which the suppliers the school invites bid their prices down, live, until the end time. The lowest bid usually wins.
Role	What a member of staff is in the school (teacher, bursar, director of studies and so on). Roles decide which pages a person sees and what they may change; one person can hold several.
Roll-call	One taking of attendance - the students expected (a class, a stream, a service's students or the whole school) marked present, late or absent, then closed. Only closed roll-calls count in attendance figures.
Row menu	The button with three dots at the end of a row in a list. It holds the actions for that one record.
Scheme of work	A subject's plan for one term, week by week. Each line gives the theme or topic, what is taught and how, and whether the lesson was conducted.
School group	Several schools with the same owner, seen side by side on one page. School Dynamics sets a group up and puts the schools in it.
SchoolPay code	The payment code SchoolPay gives each student. Parents quote it when they pay at a bank or by mobile money, and School Dynamics records the payment on the student who holds that code.
Search and go	The search box in the top bar (Ctrl+K, or / on any page). It finds students, parents, staff, receipts, classes and more, runs common actions and opens any page of your menu.
Semester	A university's term. A university's academic year has two, and students are enrolled for each one.
Service	An extra charge that only some students take, such as transport, swimming or a uniform. Students are subscribed to it, and it is billed to them alone.
Sign-in code	A six-digit code the school sends to a parent's phone to open the parents' page. It works once, for 10 minutes.
SMS credit	Money paid to School Dynamics for text messages, bought under Licence & billing. It goes into the SMS wallet once the payment is confirmed.
SMS part	One text of up to 160 characters. A longer message is cut into numbered parts (1/2, 2/2), and each part costs UGX 50.
SMS wallet	The school's money for text messages. SMS credit you buy goes in; every SMS part sent comes out at UGX 50. When it is empty, no text goes.
Stage	A pick-up point on a transport route, with a single-trip fare and a round-trip fare for the term. Students are put on transport at a stage.

Statement	Every line on one student's account in date order, with the balance after each one. You can open it on screen or print it as a PDF.
Stay	One student holding one hostel bed, from a start date until an end date, as Occupied (sleeps there) or Reserved (held for them). Checking the student out ends the stay and frees the bed.
Stock batch	One delivery of one item into the store, with its quantity, supplier and unit price. Stock goes out of a batch, and the batch shows what is left and what that is worth.
Stream	A group inside a class (P.7 East, P.7 West), with its own stream teacher. The class's subjects and fees are the same for every stream.
Student account	Each student's fees account. Every bill and every payment for the student is a line on it, and the lines add up to the student's balance.
Student status	Where a student stands. Active means in school now (numbered and billed); Pending means admitted but not yet active (not billed); Not active means left or finished school (records and balance kept); Applicant is a student the old system made from an online application.
Subject	A subject as one class takes it, with its teachers and whether it is printed on report cards and counted in grades. The same subject in two classes is two subjects.
Supervisor	The person who reviews a teacher's schemes of work and lesson plans. The head teacher, deputy, director of studies and school administrator review everyone's; a teacher can also have a named supervisor on their staff record.
Supplier	A business or person the school buys from, kept under Procurement › Suppliers with their contacts, what was spent with them and what is still owed.
Supplier catalogue	The products the school's suppliers post on their portal, with prices and pictures. Staff browse it and turn what they pick into a purchase request.
Supplier invoice	A supplier's bill for goods the school has received on a purchase order. Finance checks it against the order and the deliveries, approves it, then pays it.
Supplier portal	The supplier's own pages, at the address ending in /supplier. A supplier the school gives a password signs in there to quote, bid, accept orders, announce deliveries, invoice and follow payments.
Term	One part of the academic year (Term 1, Term 2, Term 3). Fees, marks, report cards and roll-calls belong to a term. A university has semesters instead.
Term switch	The term button in the top bar. It chooses which term's marks, report cards, fees and finance reports you look at. New work still goes to the school's active term.
Theology class	A class of the theology track (subjects such as Quran and Fiqh), kept beside the secular classes, with its own subjects, streams, marks and report cards.
Three-way check	Comparing an invoice with three figures before it is approved: what was ordered, what was received, and what was already invoiced. An invoice for more than was received and not yet invoiced is refused.

Timetable draft	A week of lessons proposed by the timetable generator. It changes nothing until it is published, and the latest publish can be undone.
Two-step sign-in	A six-digit code from your phone, asked for after your password, so a stolen or guessed password alone does not open your account. The school's owner, administrator, head teacher and bursar must use it.
Vote	A main heading of the school's budget, such as KITCHEN or ADMINISTRATION. The budget accounts sit under it, and reports add them up by vote.
Working day	A day the school works, as set in the staff attendance working week. Uganda's fixed public holidays, Good Friday and Easter Monday are left out on their own.



School Dynamics

Questions? Ask under any lesson in the app, or write to the team.

app.schooldynamics.ug/help