

# Greenz Educational ERP

## *User and Operations Manual*

Complete role-based guide for Software Owner, Principal, campus management, Admissions, Academics, Attendance, Teachers, Exam Control, Accounts, HR and Students.

| Edition | Environment                                       | Prepared       |
|---------|---------------------------------------------------|----------------|
| 2.0     | Greenz Educational ERP production operating guide | 4 October 2026 |

### Live access

Staff and management: <https://educationalerp.greenzholding.com>

Software Owner: <https://educationalerp.greenzholding.com/owner>

Student Portal: <https://educationalerp.greenzholding.com/student>

Prepared for organisation-wide operational use

## How to Use This Manual

This guide follows the order in which a new institution should configure and operate Greenz Educational ERP. Read the setup chapters first, then give each employee only the chapters relevant to their assigned responsibility.

**Roman Urdu quick start.** Pehle Software Owner organisation aur campuses banaye ga. Principal staff aur campus-wise responsibilities assign kare ga. Admission Office student admit kare ga; student Student Lobby mein aye ga. Academic Incharge class, subjects aur teachers define karke student ko class mein allocate kare ga. Us ke baad attendance, SOS, teaching coverage, exams, fees, payroll aur reports apne respective modules mein operate hon ge.

## Audience

| Reader                     | Use this manual for                                                                             |
|----------------------------|-------------------------------------------------------------------------------------------------|
| Software Owner             | Customer organisations, campuses, branding, subscriptions and protected Principal access.       |
| Principal / Administrator  | Organisation oversight, staff records, responsibilities, approvals and cross-campus management. |
| Operational staff          | Admissions, Academics, Attendance, Exam Control, Accounts and HR workflows assigned to them.    |
| Teachers / Class Incharges | SOS, daily coverage, attendance, award lists, class reports and leave decisions.                |
| Students                   | Read-only learning, attendance, fees, results and communication portal.                         |

## Interface conventions

- The left sidebar opens major modules. A module's own submenu opens one focused workflow at a time.
- Campus scope selectors control which campus is being viewed or edited. Always verify the displayed campus before saving.
- A grey or missing action normally means the user lacks that responsibility, the record is locked, or a prerequisite is incomplete.
- Print buttons open the browser print dialog. Choose Save as PDF when an electronic copy is needed.
- Refreshing the browser keeps an active session and reloads current database records. An expired session correctly returns the user to sign-in.

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**Scope note.** This manual documents the current application. The old Guardian route redirects to the single Student Portal; students and families therefore use the same student credentials issued by Admissions.

# Getting Started

## Access addresses

| Portal | Address | Who uses it |
|--------|---------|-------------|
|--------|---------|-------------|

| Portal               | Address                                                                                                                       | Who uses it                                             |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|
| Organisation ERP     | <a href="https://educationalerp.greenzholding.com/">https://educationalerp.greenzholding.com/</a>                             | Management, staff, teachers and departmental users.     |
| Software Owner       | <a href="https://educationalerp.greenzholding.com/owner">https://educationalerp.greenzholding.com/owner</a>                   | Platform owner only.                                    |
| Student Portal       | <a href="https://educationalerp.greenzholding.com/student">https://educationalerp.greenzholding.com/student</a>               | One read-only portal for each admitted student.         |
| Receipt verification | <a href="https://educationalerp.greenzholding.com/verify-receipt">https://educationalerp.greenzholding.com/verify-receipt</a> | Anyone verifying a receipt reference or QR-linked page. |

## Sign in to the correct departmental portal

1. Open the Organisation ERP address.
2. Select Management, Staff, Teacher, Admissions, Accounts, Academics or Exam Control.
3. Enter the official email and password issued by the Principal or Software Owner.
4. On first login, replace the temporary password with a private password of at least 12 characters.
5. After signing in, confirm the displayed organisation, campus and role before entering data.

**Portal mismatch.** A valid account may still be rejected if it is entered in the wrong departmental portal. A Teacher account belongs in Teacher, while the permanent Principal account belongs in Management.

## Session, refresh and sign-out behavior

- The browser stores the active session so a normal page refresh does not sign the user out.
- A refresh fetches the latest records from the database. Use it after another user completes a dependent task.
- If the server is waking from a free hosting sleep, the first request may take longer. Wait, then use Retry refresh .
- Always use Sign out on shared computers. Changing a password closes older sessions where supported.
- Never share the Software Owner, Principal or Accountant account. Create named staff accounts and assign exact responsibilities.

## Safe data-entry habits

- ☐ Verify organisation, campus, academic session and date.
- ☐ Search for an existing record before creating another.
- ☐ Use archive/deactivate when history must be preserved.

- ☐ Read confirmation prompts before delete, reverse, reopen or regenerate actions.
- ☐ Keep references, approval reasons and reconciliation notes meaningful.

## Organisation Structure and Access Control

### Data hierarchy

Greenz Educational ERP is multi-tenant and multi-campus. Data is first isolated by organisation and then by campus. A user sees only the organisation and campus responsibilities attached to their login.

| Level             | Examples                             | Rule                                                                               |
|-------------------|--------------------------------------|------------------------------------------------------------------------------------|
| Platform          | Software Owner console               | Creates and bills customer organisations; not used for daily college operations.   |
| Organisation      | One school/college group             | Holds branding, academic session, central ledger and permanent Principal identity. |
| Campus            | Main Campus, City Campus             | Own admissions, classes, attendance, exams and campus transactions.                |
| Academic cohort   | Grade 8, First Year, BSCS Semester 1 | Connects students, subjects, teachers, attendance and exams.                       |
| Individual record | Student, employee, challan, journal  | Accessible only through the user's permitted scope.                                |

### Academic track rules

| Campus type | Structure                                            | Progression                                                            |
|-------------|------------------------------------------------------|------------------------------------------------------------------------|
| School      | Create classes directly; no department layer.        | Promote to the next ordered class or mark passout.                     |
| College     | Create classes directly; no department layer.        | Year 1 → Year 2 → passout. A new annual fee cycle starts on promotion. |
| University  | Create a department/program, then classes inside it. | Semester-by-semester progression up to the configured total.           |

### Responsibility directory

| Responsibility | Main workspace | Typical authority |
|----------------|----------------|-------------------|
|----------------|----------------|-------------------|

| Responsibility               | Main workspace            | Typical authority                                                               |
|------------------------------|---------------------------|---------------------------------------------------------------------------------|
| Software Owner               | Owner Console             | Organisations, campuses, subscriptions and Principal credentials.               |
| Principal / Administrator    | Management                | Organisation dashboard, staff administration, approvals and broad read access.  |
| Vice Principal / Campus Head | Management                | Assigned-campus oversight and permitted campus operations.                      |
| Admissions Head / Officer    | Admissions                | Campus admission records, Excel import, reports and student portal credentials. |
| Academic Head / Officer      | Academics                 | Lobby allocation, classrooms, subjects, teachers, SOS and planning.             |
| Attendance / Daily Register  | Attendance                | Student and staff daily attendance for the assigned campus.                     |
| Teacher                      | My Teaching / Award Lists | Assigned subjects, SOS, coverage and exam marks.                                |
| Class Incharge               | My Incharge Class         | Class reports, student leave decisions, results and fee visibility.             |
| Exam Controller              | Exam Control              | Sessions, papers, datesheets, marking windows, results and exam fines.          |
| Accounts Head / Accountant   | Accounts                  | Organisation-wide finance, approvals, posting, reporting and payroll payment.   |
| General staff                | HR & Payroll              | Own leave, notifications and payslips, plus assigned extra duties.              |
| Student                      | Student Portal            | Read-only records; may submit leave and change own password.                    |

**One employee, multiple campus duties.** The same staff login can hold different responsibilities in different campuses. The Principal assigns duties campus by campus. Class Incharge requires a specific class, and Teacher responsibility is added automatically when a class is assigned.

### Least-privilege rules

- Give only the responsibility required for the employee's job.
- HouseHelp staff cannot receive teaching or management responsibilities.
- Vice Principal access is campus-scoped; Staff editing and responsibility assignment remain Principal-controlled.

- The Accountant works across the organisation, while campus and organisation-level ledgers remain separate scopes.
- Management can view financial reports; data-entry and approval actions follow dedicated Accounts permissions.
- Students cannot edit profile, attendance, results, fees or diary entries.

## Software Owner Console

The Software Owner creates customer organisations and their permanent Principal accounts. Daily institutional data is managed inside each organisation ERP, not in the owner console.

### Create a customer organisation

6. Open /owner and sign in with the Software Owner account.
7. Open Organisations and select Add customer organisation .
8. Enter organisation name, unique organisation code, logo, academic session, address and phone.
9. Set monthly price per campus and the billing start date.
10. Add each campus and select School, College or University for its academic track.
11. Enter the Principal / Head name and select Create organisation & generate login .
12. Copy the one-time Principal credentials immediately and share them securely.

**Credential handling.** Temporary passwords are shown once. The Principal must replace the temporary password on first login. Do not store credentials in spreadsheets, chat groups or public documents.

### Edit organisation and subscription

- Edit name, branding, address, phone and academic session from the organisation card.
- Set subscription status to Trial, Active, Past due, Suspended or Cancelled as required.
- Update price per campus, next billing date and subscription notes.
- A protected host organisation cannot be deleted. Other organisations require typing the organisation code to confirm permanent deletion.

### Subscription billing

13. Open Subscription billing.
14. Choose Generate all due invoices , or issue one invoice by organisation and billing month.
15. Review the campus-count snapshot, unit price, amount and due date.
16. For a received payment, select Record payment and enter date, method and unique reference.
17. If an issued invoice is invalid, void it with a clear reason. Do not edit paid or historical snapshots.
18. Use the recent billing audit to review each subscription action.

## Principal access and recovery

19. Open Principal access.
20. Find the organisation and review its permanent Principal login.
21. Use Change principal name when the office holder changes; the protected login stays unchanged.
22. Use Reset password only after identity verification. Save the new one-time credentials securely.

## Principal, Campus Management and Staff Setup

### Management dashboard

The Principal receives an organisation-wide dashboard. A Vice Principal / Campus Head receives a campus dashboard. It combines attendance, fee recovery, income, expenses, staff, classes and exam performance.

- Review today's attendance and unmarked classes.
- Review expected, collected and recoverable fees.
- Review today's income, expenses, net movement and closing balance.
- Review campus/class strength and pending award lists.
- Use quick actions to open permitted operational modules.

### Add and maintain staff

23. Open Staff and select Add staff member .
24. Choose Teaching Staff or HouseHelp Staff.
25. Select HR/payroll home campus, designation, contact, employment details and monthly salary.
26. For Teaching Staff, assign campus responsibilities separately for every campus.
27. If Class Incharge is selected, choose the exact class.
28. Save and copy the generated official login and one-time password.
29. Ask the employee to use the correct portal and replace the temporary password.

| Staff action            | Use when                                                                            | History rule                                       |
|-------------------------|-------------------------------------------------------------------------------------|----------------------------------------------------|
| Edit details            | Phone, designation, department, qualification, salary or employment details change. | Updates the active profile.                        |
| Campus responsibilities | The employee gains or loses a duty in a campus.                                     | Access changes immediately and is server-enforced. |
| Generate one-time reset | The employee cannot access the account.                                             | Old sessions are invalidated where applicable.     |

| Staff action       | Use when                                                   | History rule                                       |
|--------------------|------------------------------------------------------------|----------------------------------------------------|
| Remove / Archive   | Employment ends or access must be disabled.                | Login is disabled; history is preserved.           |
| Restore            | An archived employee returns.                              | Existing record and history are reactivated.       |
| Delete permanently | Only an archived, unlinked record was created incorrectly. | Irreversible; requires employee-code confirmation. |

**Protected Principal identity.** The Principal cannot archive their own permanent account. Only the Software Owner can change the protected Principal name or issue a Principal password reset. The Principal may maintain non-identity HR fields.

## Notifications and optional WhatsApp

Notifications contains workflow alerts for staff and students. The unread badge refreshes automatically. Open Notifications to read an alert, mark it as read, enable device notifications where available, or send the built-in test notification. Automatic alerts can include student absence, a new challan, a published result and a saved daily diary entry. The organisation administrator controls these workflows from Admin Settings and may disable an individual alert type without disabling the others.

WhatsApp is a separate optional integration. Use it only after the organisation has completed verified Meta onboarding and the production status shows Connected. If it is hidden, disabled or unconfigured, continue using Announcements and in-app Notifications.

## Admissions

**Campus-first rule.** Admissions starts by selecting the campus. The admission form does not ask for campus again. Every registration, Excel import and report remains locked to the selected campus.

### Open the campus admission dashboard

30. Sign in through Admissions or open Admissions from Management.
31. If more than one campus is assigned, choose the campus card first.
32. Confirm the title shows Admissions – [Campus Name] .
33. Use Change campus before working on another campus.

### Create a new admission

34. Select New admission.

35. Enter the registration or admission number, student and father details, date of birth, identity information and admission date.
36. Select the requested placement created by the Academic Head. School and college users select Requested class. University users select Requested department and class.
37. Enter parent or guardian name, parent mobile and the required WhatsApp contact. Record the address and optional emergency or home contact.
38. Record previous school and previous class information. Admission Office records the request but does not perform the final classroom allocation.
39. Set the campus fee package. School and college use annual tuition fee, annual exam fee and number of installments. University uses the current session fee and number of installments. The amount per installment is calculated automatically.
40. If money is received at admission, enter the verified initial payment details. Otherwise leave the optional initial payment at zero.
41. Save. The student becomes Active, Awaiting allocation and appears in Academic Student Lobby with the requested placement.

**Separation of duties.** Admission Office creates the student and fee package. Academic staff allocate the classroom later. An Admission Officer cannot bypass the lobby by assigning a class.

### Issue Student Portal access

42. Find the student in Admission register and choose Student portal.
43. Enable or reset portal access and save the one-time password.
44. Give the student the organisation code, admission number and one-time password.
45. Disable portal access if the student should no longer sign in; history remains intact.

### Excel import

46. Choose Import Excel after the correct campus is selected.
47. Download the template generated for that campus and academic track.
48. Open the Academic Setup sheet and copy the exact class, department and program names created by the Academic Head. Do not invent a different spelling in the student rows.
49. Complete every required identity, parent, WhatsApp, requested placement, campus fee and installment column without changing the headers.
50. Upload the .xlsx file for validation. The file may contain up to 1,000 students and must remain within the displayed size limit.
51. Correct every reported row error or duplicate before committing. Validation does not save students.
52. Commit the validated import. Students are created atomically and enter Student Lobby unallocated.

**Template rule.** Use only the template generated after campus selection. School/college and university templates use different academic fields. A validation failure does not partially import the file.

## Registers and reports

- Admission register: live search, edit profile, manage portal and deactivate.
- Registration list: campus-scoped official student list.
- Admission reports: Today, This week, This month or custom range with print support.
- Deactivate preserves academic, attendance, exam and fee history. Use it for withdrawals.

## Academics

**Required academic sequence.** 1) Create class/department structure → 2) Define subjects → 3) Allocate students from Student Lobby → 4) Assign teachers inside each class → 5) Set session calendar and request SOS → 6) Track daily coverage.

### Student Lobby

53. Open Academics, select the campus and choose Student Lobby.
54. Review Requested placement, the Admission Office note, previous education and starting level before allocation.
55. If no suitable classroom exists, open Classrooms and create it first.
56. Select Allocate to class. The requested class is preselected when it is still available, but the Academic Head remains responsible for the final decision.
57. For a university student, confirm the class belongs to the correct department or program and semester.
58. Confirm the fee-cycle start date. The ERP generates a roll number and removes the student from the lobby.

For a student class change, open the current classroom and choose **Remove to lobby**. The student returns to Student Lobby without losing history; allocate the correct class from there. To rename a class for every linked student and record, open Classrooms, choose **Edit class**, update the name and save. Do not rename a class merely to move one student.

### School and college setup

59. Open Academics, select the campus, then choose Classrooms.
60. Use Create classroom to add the official class name. No department is required.
61. For school, set the promotion order correctly so promotion can move to the next class.
62. For college, use the class with the student's current Year 1 or Year 2 level.
63. Open the classroom after creation to manage its students and subjects. Use Edit class when the official class name or school promotion order changes.

## University department and class setup

64. Open Academics, select the university campus, then choose Classrooms.
65. Create the department or program first, for example Computer Science or BSCS, with code, total semesters and months per semester.
66. Create the class inside that department, for example BSCS 1st, and set its semester level.
67. Repeat for each semester or class required by the program.
68. Allocate students from Student Lobby to the correct class inside the department.

## The two classroom panels

| Panel               | Actions                                                                                               | Important rule                                                                 |
|---------------------|-------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| Students            | View allocated students; promotion/passout; registration & fee list where available; Remove to lobby. | Removal is the safe path for class changes.                                    |
| Subjects & Teachers | Add subject and optional code; assign/change/remove teacher.                                          | Only active Teaching Staff with campus Teacher responsibility can be selected. |

## Teacher allocation and changes

69. Open the classroom and locate the subject under Subjects & Teachers.
70. Choose Assign teacher, select an eligible teacher and save.
71. To replace the teacher, choose Change teacher and save the new teacher.
72. To leave the subject temporarily unassigned, choose Remove allocation.

**SOS after teacher change.** Teacher allocation is tied to the subject/class assignment. After a change, review open SOS and coverage ownership. The Academic Incharge should request or review a suitable SOS for the current teacher.

## Promotion and passout

- School: promote to the next ordered class; the final class can be marked passout.
- College: Year 1 → Year 2 → passout.
- University: promote one semester at a time up to total semesters, then mark passout.
- Promotion starts a new fee cycle. Review fee preview and enter any allowed increment before confirming.
- Historical attendance, exam rosters and finance remain attached to the original period.

## SOS & Session Calendar

73. Create or activate the academic session/term with start and end dates.
74. Add holidays, trips, events and exam days to block non-teaching dates.
75. Select subject assignments and send Request SOS to teachers.
76. Teachers prepare dated topic plans and submit them.
77. Approve to release Daily Coverage, or return with clear changes required.

## Coverage & Reports

- View classrooms, students, subjects and teacher ownership.
- Review average coverage and subject progress bars.
- Review latest coverage date, topic, details and completion percentage.
- Print the campus coverage and teaching report.

## Academic Operations

78. Create a formal term and set it Draft or Active.
79. Keep one current active term per campus; close it when complete.
80. Build the timetable by term, cohort, subject, teacher, weekday, time and optional room.
81. Resolve any teacher, cohort or room clash before saving.

## Teacher and Class Incharge Workflows

### Teacher: Scheme of Study

82. Sign in through Teacher and open My Teaching.
83. Open My Subjects to confirm each assignment and SOS status.
84. When requested, open Scheme of Study.
85. Add topics with planned dates inside the session and outside blocked days.
86. Submit the complete SOS. If returned, read the note, correct and resubmit.

### Teacher: Daily Coverage and Daily Diary

87. Open Daily Coverage after SOS is Approved.
88. Choose the subject and approved SOS topic.
89. Select a date within the session window.
90. Write lesson details, learning points, exercise/homework or variance.
91. Set completion percentage and save.
92. Review Recent coverage history. Saving the same dated topic updates the record.

**Automatic student communication.** A saved coverage entry appears in relevant students' read-only Daily Diary. Use clear, student-friendly topic and detail text because it becomes an official daily learning record.

## Class Incharge workspace

| Tab                | Purpose                                  | Edit rights                                      |
|--------------------|------------------------------------------|--------------------------------------------------|
| Class overview     | Class strength and current snapshot.     | Read-only.                                       |
| Attendance reports | Attendance records and summary.          | Read-only; daily register stays in Attendance.   |
| Leave requests     | Student requests with dates and reason.  | Approve/reject with review note.                 |
| Exam results       | Published and permitted results.         | Read-only.                                       |
| Exam fines         | Automatic fines from Exam Control rules. | Read-only; Class Incharge does not set the fine. |
| Class list & fees  | Student contacts and fee status.         | Read-only; Accounts controls transactions.       |

## Review student leave

93. Open My Incharge Class → Leave requests.
94. Review dates and reason.
95. Approve or reject and add a clear review note.
96. The decision appears in Student Portal and approved leave is reflected in attendance for the dates.

## Unified Student and Staff Attendance

Attendance is one module with two datasets: Student Attendance and Staff Attendance. The assigned campus Attendance Officer uses the same workspace to mark both.

### Access and campus scope

- Attendance responsibility is assigned per campus from Staff → Campus responsibilities.
- The Attendance Officer can mark student and staff attendance for that campus.
- Management receives read-only consolidated or campus views according to role.
- Staff daily marking remains restricted to the assigned Attendance Officer.

## Daily student attendance

97. Open Attendance → Student Attendance → Daily marking.
98. Choose campus, date and academic cohort.
99. Select Load student roster.
100. Use Mark all present, then change exceptions to Absent or Leave.
101. Enter a mandatory reason for Leave and optional remarks for other statuses.
102. Submit attendance and verify the confirmation.

## Register lock and correction

| Status/action      | Meaning                                             | Who acts                                       |
|--------------------|-----------------------------------------------------|------------------------------------------------|
| Draft              | Roster not yet submitted.                           | Authorized marker.                             |
| Submitted          | Daily records saved and available in reports.       | Marker; management may lock.                   |
| Locked             | Register cannot be edited.                          | Principal/Campus management according to role. |
| Reopen with reason | Locked register reopened for an audited correction. | Principal; reason required.                    |

## Daily staff attendance

103. Switch to Staff Attendance → Daily marking.
104. Choose campus/date and load employee roster.
105. Default all Present and mark Absent, Leave, Half-day or Late exceptions.
106. Add remarks where needed and submit.
107. Correcting the same employee/date updates the record with an audit event; it does not create a duplicate.

## Reports and payroll link

| View                | Student use                                    | Staff use                                         |
|---------------------|------------------------------------------------|---------------------------------------------------|
| Detailed report     | Filter cohort/date/status and review register. | Filter employee/date/status and remarks.          |
| Monthly summary     | Present, absent and leave counts.              | Present, absent, leave, half-day and late counts. |
| Combined daily view | Campus daily totals.                           | Staff totals shown with student totals.           |

Staff monthly summaries can feed an optional Attendance Deduction salary component. A rule may deduct a flat amount or  $\text{Basic Salary} \div \text{working days}$ , with an optional half-day factor. The deduction appears as its own payslip line and journal posting.

**Do not backfill by guess.** If historical staff attendance was not recorded, leave attendance deduction off for that period or enter verified records only. Do not invent attendance to complete payroll.

## Exam Control

**Create session → Announce → Schedule papers & syllabus → Issue datesheet → Print attendance sheets → Award lists → Marks sheet → Publish/lock → Automatic fines**

### Create and announce a session

108. Open Exam Control and select campus.
109. Enter session name, academic session, dates and instructions.
110. Set the fine amount for results below the passing percentage.
111. Set marking capacity per day; the standard operational value is 25 papers per teacher per day.
112. Create as Draft, review and choose Announce.

Announcement notifies relevant management, teachers and students. The student announcement shows the exam/test and configured fine rule.

### Schedule papers and syllabus

113. Select the session and class or cohort.
114. For a school or college class, select the section before selecting the subject. The syllabus list is section-specific and rejects coverage from another section.
115. For a university class, confirm the department, semester and subject.
116. Enter the exam date, maximum marks and passing percentage.
117. Review syllabus options derived from approved coverage for the selected class, section and subject.
118. Select starting and ending topics in chronological order, save, and repeat for every paper.

### Issue the four-column datesheet

Verify every row contains **Date, Subject, Total Marks and Syllabus**.

- Management receives the whole datesheet.
- Teachers receive assigned subject, date, syllabus and total marks.
- Students receive their subject, date and syllabus.
- After issue, candidate rosters and paper definitions are official records.

## Attendance sheets and award windows

119. Open Attendance sheets, select the session and class, and review the frozen candidate roster.
120. Confirm the sheet header shows the exam, paper, class, section, date and total marks.
121. Print the roll number, student name, father name, signature and Obtained marks columns. The teacher can use the signed paper list as the physical marks record after checking.
122. On each paper date, the assigned teacher receives that class, section and subject Award List.
123. Total marks are fixed; the window is calculated from candidate count and daily marking capacity.
124. The teacher may submit cumulative batches. After expiry, the Principal can grant 1 to 30 extra days with a reason.

## Marks, report cards, publication and fine

125. Monitor completion for all papers. A class result becomes ready only after all required award lists are submitted.
126. Open Marks sheet, select the exam session and class or cohort, then generate the result.
127. Review the class result sheet, analytics and every student's provisional subject marks.
128. Use Print all report cards to produce one print-ready result card per student with roll number, student details, subjects, total marks, obtained marks, percentages, grand total and remarks.
129. Use Download Excel to receive one workbook containing a roll-number-wise worksheet for every student in the selected class.
130. Publish the result when all values are verified. Students receive official result cards and graphs.
131. Lock the result. For an essential correction, reopen with reason, correct, republish and relock.

**Automatic exam fine ownership.** The Exam Controller sets the session fine and paper passing percentage. A published result below the threshold automatically creates the fine, notifies student and Class Incharge, and posts it to Student Ledger. The Class Incharge does not set this fine.

## Accounts: Scope, Controls and Core Concepts

The Accounts module uses a Chart of Accounts and balanced journal lines. Posted balances, student ledgers, bank/cash positions and reports are derived from the double-entry journal rather than flat totals.

### Select the correct scope

| Scope           | Purpose                                                      | Editing rule                             |
|-----------------|--------------------------------------------------------------|------------------------------------------|
| Specific campus | Student fees, challans, campus income/expense and bank/cash. | Transactions belong only to that campus. |

| Scope                               | Purpose                                                    | Editing rule                            |
|-------------------------------------|------------------------------------------------------------|-----------------------------------------|
| Organisation level – central ledger | Central-office income/expense not belonging to one campus. | Student fees remain outside this scope. |
| All campuses – combined report      | Consolidated campuses plus organisation ledger.            | Read-only; post in a specific scope.    |
| Unassigned                          | Migrated records whose campus was not safely known.        | Review and flag; never guess.           |

## Accounts submenu

- Fee collection & receipts; Challans & dues; Vouchers & journal.
- Bank & cash; Financial reports; Audit trail.
- Other income; Expenses; Daily report; Monthly report; Chart of Accounts.

## Double-entry lifecycle

| State    | Meaning                                                | Next action                             |
|----------|--------------------------------------------------------|-----------------------------------------|
| Draft    | Data entry/review; no posted-balance effect.           | Edit or Approve.                        |
| Approved | Authorized but not yet final in ledger.                | Post.                                   |
| Posted   | Immutable balanced entry included in balances/reports. | Reverse only.                           |
| Reversed | Original visible; equal opposite entry corrects it.    | Create correct replacement if required. |

**Never edit posted finance.** Correct a posted journal through Reverse with a meaningful reason, then create the correct replacement. Do not hide mistakes by deleting history.

## Chart of Accounts and Vouchers

### Create a COA head

132. Open Accounts → Chart of Accounts.
133. Choose Asset, Liability, Equity, Income or Expense.
134. Enter a unique code, account name and normal balance.
135. Choose a parent for a posting head under a control account.
136. Choose Organisation-wide or Specific campus scope.

137. For appropriate income, select Student link required.
138. Create and verify it in Account hierarchy.
  - Use clear reusable names; do not create one account per transaction/student.
  - Post operational entries to active child/posting accounts.
  - Deactivate unused accounts; existing postings remain linked.
  - System accounts are never physically deleted.

### **Create Receipt or Payment voucher**

139. Select Receipt or Payment.
140. Enter date, scope, optional reference and description.
141. Choose income account for Receipt or expense account for Payment.
142. Choose the real bank/cash account and amount.
143. Create Draft, review equal debit/credit, then Approve and Post.

### **Create Journal voucher**

144. Select Journal and choose scope/date/reference/description.
145. Add at least two lines with account, debit/credit and useful description.
146. Confirm total debit equals total credit and is greater than zero.
147. Create Draft, Approve and Post.

Use Lines to inspect entries, filters to review scope, Check account balance for derived balance, and Reverse only on Posted records with a meaningful reason.

## **Fees, Challans and Student Ledger**

### **Fee structure and collection**

- Structures are class/campus/session specific and may be annual, term-wise or semester-based.
- The admission package becomes the starting obligation for that cycle.
- Collections must use a real active Bank/Cash account.
- Partial payments leave the remaining balance open.
- Overpayment becomes advance credit for future challans.

### **Generate challans**

148. Open Challans & dues in the correct campus.
149. Choose Class bulk or Individual.
150. For bulk, select class, session, term, structure, issue date and due date.

- 151. For individual, search student and enter charge/session/dates and optional custom amount.
- 152. Generate. Each charge posts a balanced student-ledger journal and duplicates are prevented.
- 153. Open the challan and select Print / Save PDF.

### Record payment and receipt

- 154. Search the student or open the outstanding challan.
- 155. Enter date, amount, real Bank/Cash account and reference.
- 156. Save. Payment allocates to the oldest outstanding challan first.
- 157. Review paid, outstanding and advance amounts.
- 158. Print/save official receipt; use receipt verification where needed.

### Discounts and scholarships

- 159. Accountant proposes a discount for a student or fee structure.
- 160. Choose Fixed or Percentage, optional session and reason.
- 161. Send to Principal.
- 162. Principal Approves or Rejects with notes.
- 163. Approved discount applies when an unpaid challan is generated/regenerated.

### Late-fee rules

- 164. Choose organisation default or campus override.
- 165. Choose Flat or Percentage of outstanding.
- 166. Set value, grace days and optional cap.
- 167. Save; the previous rule for that scope becomes inactive.
- 168. Select Apply due late fees now. The operation does not duplicate an existing fine.

### Student ledger

| Ledger side     | Meaning                            | Examples                                                        |
|-----------------|------------------------------------|-----------------------------------------------------------------|
| Debit           | Amount charged to student.         | Fee package, challan, late fee, automatic exam fine.            |
| Credit          | Amount paid or credited.           | Receipt/payment, approved credit, advance applied.              |
| Running balance | Net amount owed after every entry. | Positive normally outstanding; advance shown/netted separately. |

## Bank, Cash, Transfers and Reconciliation

### Create a bank or cash account

- 169. Open Bank & cash → Accounts.
- 170. Choose Bank or Cash and enter a clear name.
- 171. Choose organisation or campus scope.
- 172. For Bank, enter available bank/account/IBAN/branch details.
- 173. Map to the correct COA asset account and save.

Every balance is derived from posted journal lines. Old free-text payment method is not a replacement for a real financial account.

### Transfer between accounts

- 174. Choose source and destination accounts; they must differ.
- 175. Enter date, amount, reference and description.
- 176. Create Draft, then Approve and Post.
- 177. For a mistake, Reverse with a reason.

**Cross-campus transfer.** The organisation Accountant may transfer between campuses. It remains one balanced journal: credit source, debit destination. Never record it as unrelated income and expense.

### Reconciliation

- 178. Choose financial account and date range.
- 179. Enter statement closing balance.
- 180. Load unreconciled posted lines and compare system balance, statement balance and difference.
- 181. Mark verified lines Reconciled.
- 182. Investigate remaining difference; never change journal amount merely to force reconciliation.

Reconciliation changes status metadata only; it never changes debits, credits or balances.

## Financial Reports, Payroll and Audit Trail

### Financial Reports & Exports

| Report            | What it answers                                                    |
|-------------------|--------------------------------------------------------------------|
| Trial Balance     | Are closing debits and credits equal, by COA type?                 |
| Income vs Expense | What is campus-wise and consolidated net income/loss by hierarchy? |

| Report                      | What it answers                                                   |
|-----------------------------|-------------------------------------------------------------------|
| Cash / Bank Position        | What are opening, debit, credit and closing balances per account? |
| Fee Collection & Defaulters | What was collected, and who is overdue by amount/days?            |
| Outstanding Dues            | What does each student/class/campus owe after advance is netted?  |
| Payroll Summary             | What salary expense was posted by period, campus and component?   |

183. Choose report and From/To dates.
184. Choose consolidated, organisation, Unassigned or specific campus scope.
185. For fee reports, optionally select class and defaulter order.
186. Apply filters and review the accounting basis.
187. Export structured Excel or printable PDF.

**Trial Balance integrity.** If Trial Balance does not balance, the system reports a data-integrity error. Stop posting and investigate migration/manual database changes with technical support.

## Salary setup and payroll

188. Open HR & Payroll → Salary setup.
189. Create reusable earning/deduction components and map each to COA.
190. Assign component amounts to employees.
191. Optionally configure Attendance Deduction by flat amount or Basic Salary ÷ working days.
192. For the month, Generate missing drafts and review itemized calculations.
193. Principal selects Approve & issue payslip.
194. Accountant selects Pay & post, chooses real Bank/Cash account and reference.
195. For error, authorized Principal reverses with reason and a corrected payroll is prepared.

## Employee payslips

- Employees open HR & Payroll → Payslips to view only their own records.
- Payslip shows each earning/deduction, gross, total deductions and net pay.
- Attendance Deduction appears separately when enabled.
- Use Download PDF for the official copy.

## Financial audit trail

196. Filter by record type, action, actor user ID and date range.
197. Open an event to compare before/after snapshots.
198. Use actor, timestamp and record ID to trace the operation.
199. Correct source records through approved workflow; audit evidence is read-only.

## HR and Employee Self-Service

HR & Payroll is visible to every employee, but actions vary by role. The overview summarizes leave and, for authorized users, payroll workload.

### Employee leave request

- 200. Open HR & Payroll → Leave management.
- 201. Choose Casual, Sick, Annual, Unpaid or Other.
- 202. Enter dates and a reason of at least five characters.
- 203. Submit and monitor My leave requests.
- 204. Cancel only while Pending.

### Management leave review

- 205. Open staff leave register and review employee, campus, dates, type and reason.
- 206. Approve or Reject with review notes.
- 207. The decision stays in history. Payroll/attendance effects depend on policy and recorded staff attendance.

## Student Portal

**Single read-only portal.** There is one Student Portal. The old /guardian route redirects to /student. A student can change only their password and submit leave; institutional records are read-only.

### First login

- 208. Open /student.
- 209. Enter organisation code, admission number and one-time password.
- 210. Set a private password of at least 12 characters.
- 211. Sign in again and verify name, campus, class/program and roll number.

### Portal sections

| Section      | Student can view/do                                                                                   |
|--------------|-------------------------------------------------------------------------------------------------------|
| Dashboard    | Attendance percentage, latest result, fee paid and pending, requests, latest diary and announcements. |
| My Timetable | University students can view the current published timetable.                                         |
| Attendance   | Dated present/absent/leave and teacher remarks; printable.                                            |

| Section                | Student can view/do                                                                              |
|------------------------|--------------------------------------------------------------------------------------------------|
| Daily Diary            | Subject coverage, topic, lesson details, planned SOS and completion; printable.                  |
| Results / Exam Reports | Provisional marks, graphs, published result cards, passing status and exam fines.                |
| Fees & Ledger          | Package, paid, pending, due date, installments, challans, debit/credit ledger and receipts.      |
| Announcements          | Campus notices, exam or test dates, syllabus, passing rule and fine notification.                |
| Notifications          | In-app alerts and, when enabled on the device, generic push alerts that open the secured portal. |
| Requests               | Submit leave and read pending/approved/rejected history with Class Incharge notes.               |
| Profile                | Read identity/contact/academic details; change password.                                         |

## Submit leave and request correction

212. Open Requests, choose dates, enter reason and Submit.
213. Monitor history for Class Incharge decision and note.
214. Approved leave is reflected in attendance for those dates.

For a correction, contact the responsible office: Admissions for profile/portal, Academic/Class Incharge for class, Attendance Officer for attendance, Teacher/Exam Control for exams, or Accounts for fees.

## Android App and Device Notifications

The Android application opens the production Greenz Educational ERP and supports the same role and campus permissions as the website. Version 1.1 uses the stable installer at <https://educationalerp.greenzholding.com/downloads/Greenz-ERP-latest.apk>.

### Install and sign in

215. Download the APK only from the official Greenz Educational ERP address supplied by the organisation.
216. Allow installation from the browser or file manager only for this installation, then turn that permission off again.
217. Open the app, select the correct portal and sign in with the same official ERP credentials.

218. If the app shows an update notice, download the latest signed APK and install it over the existing app. Do not uninstall first unless support specifically instructs you, because uninstalling also removes device notification registration.

## How updates work

- Normal web interface and workflow updates load automatically when the app starts because the Android shell opens the production ERP.
- A new APK is required when native permissions, plugins or Android code change.
- An optional update notice allows temporary continued use. A required update blocks normal use until the minimum supported APK is installed.

## Enable notifications

219. Sign in on the device and open Notifications.
220. Select Enable notifications and approve the Android permission prompt.
221. Select Send test and confirm the notification opens the correct signed-in portal.
222. Keep private attendance, marks and balances inside the authenticated inbox. Push previews contain only a short generic summary.

If Enable notifications is unavailable, the organisation's server notification service has not yet been activated. Continue using the in-app Notifications page and contact the system administrator. Each phone must be enabled separately.

## Operating Checklists

### New organisation go-live

- ☐ Owner creates organisation, branding, campuses and Principal login.
- ☐ Principal changes temporary password.
- ☐ Principal adds staff/designations and assigns campus responsibilities.
- ☐ Accounts reviews COA and creates real Bank/Cash accounts.
- ☐ Academics creates classes or university departments/classes.
- ☐ Admissions enters/imports students and issues portal credentials.
- ☐ Academics allocates lobby students, subjects and teachers.
- ☐ Academic Incharge creates calendar, requests SOS and creates timetable.
- ☐ Attendance Officer confirms student/staff rosters.
- ☐ Accounts creates fee structures/challans and verifies ledgers.
- ☐ Exam Controller tests a small complete exam workflow.

## Daily routine

- ☐ Mark student and staff attendance; review unmarked cohorts.
- ☐ Teachers submit coverage against approved SOS.
- ☐ Class Incharges review student leave.
- ☐ Admissions processes new students in correct campus.
- ☐ Accounts records verified collections/expenses using real accounts.
- ☐ Review today's exam/award-list workload.
- ☐ Management reviews dashboard and notifications.

## Month-end routine

- ☐ Apply late-fee rules and review defaulters.
- ☐ Reconcile every active bank/cash account.
- ☐ Post approved drafts and investigate stale drafts.
- ☐ Run Trial Balance and resolve integrity errors.
- ☐ Export core financial reports.
- ☐ Generate, verify, approve and pay payroll; issue payslips.
- ☐ Review Audit Trail for unusual reversals/deletions/reopens.

## Academic session rollover

- ☐ Close completed terms after coverage and exam work.
- ☐ Publish and lock final results.
- ☐ Promote/pass out students with correct date and fee preview.
- ☐ Create new session calendar and blocked dates.
- ☐ Review teacher allocations and request SOS.
- ☐ Generate new fee cycle only after allocations/structures are verified.

## Exam-day checklist

- ☐ Confirm issued datesheet, total marks and syllabus.
- ☐ Print correct class attendance sheet.
- ☐ Collect signatures and retain signed sheet.
- ☐ Confirm teacher sees award list and deadline.
- ☐ Grant extra access only with Principal reason.
- ☐ Do not publish until all papers and fine rules are verified.

## Troubleshooting and Security

| Issue                     | Likely cause                                                            | Action                                               |
|---------------------------|-------------------------------------------------------------------------|------------------------------------------------------|
| Incorrect email/password  | Wrong portal, typo, expired reset or disabled account.                  | Select correct portal; request one-time reset.       |
| Failed to fetch           | API waking, network or deployment problem.                              | Wait, Retry refresh, then report time/screenshot.    |
| Refresh returns to login  | Expired session, password change or archived account.                   | Sign in; verify account active if repeated.          |
| Campus selector empty     | No module responsibility assigned.                                      | Principal updates campus responsibilities.           |
| Student not in lobby      | Allocated, inactive, wrong campus or import not committed.              | Check classroom/admission status.                    |
| Teacher not selectable    | HouseHelp, inactive or no campus Teacher duty.                          | Correct Staff category/responsibility.               |
| Daily Coverage locked     | SOS not approved or date outside session.                               | Complete approval/use valid date.                    |
| Attendance locked         | Register locked or read-only role.                                      | Principal reopens with reason or assigns duty.       |
| Award list vanished       | Marking window expired.                                                 | Principal grants limited extra days with reason.     |
| Cannot post voucher       | Unapproved, unbalanced or inactive account.                             | Balance lines, approve and use active accounts.      |
| Reconciliation difference | Outstanding item, missing/duplicate posting or wrong statement balance. | Investigate; never alter amount to force match.      |
| Print layout incorrect    | Browser scaling/margins.                                                | Portrait, standard margins, 100% scale, Save as PDF. |

### Security rules

- Use a unique password of at least 12 characters.
- Each employee uses a named account; do not share privileged credentials.
- Do not expose database URLs, API secrets or bootstrap credentials.
- Archive/deactivate promptly when staff leave or students withdraw.
- Review unusual audit events and repeated failed sign-ins.

- For support, provide portal, organisation/campus, role, time, action, reference and redacted screenshot.

## Deployment and database safety

**Production database warning.** Before any future migration is run against live Render PostgreSQL, take a full backup/snapshot and test upgrade and rollback against a restored staging copy. Do not use the local database as proof that live fee, cashbook, payroll or attendance history is safe.

- Run database migrations before the new API process starts.
- Verify health endpoint, login, one read workflow and one reversible test workflow.
- Never enable demo seed configuration in production.
- Keep rollback instructions, deployment commit and migration head in the release record.

## Quick Reference

### Common status lifecycles

| Record                       | Lifecycle                                                           |
|------------------------------|---------------------------------------------------------------------|
| Journal / voucher / transfer | Draft → Approved → Posted → Reversed                                |
| Discount                     | Proposed → Approved or Rejected                                     |
| Challan                      | Unpaid → Partially paid → Paid; Overdue with balance after due date |
| Student attendance           | Draft → Submitted → Locked → Reopened (reason)                      |
| SOS                          | Requested → Draft → Submitted → Approved or Returned                |
| Exam result                  | Collecting → Published → Locked → Reopened (reason)                 |
| Payroll                      | Draft → Approved/payslip → Paid/journal → Reversed                  |
| Student leave                | Pending → Approved or Rejected                                      |
| Staff leave                  | Pending → Approved/Rejected; employee may cancel while pending      |

## Glossary

| Term   | Meaning                                                                        |
|--------|--------------------------------------------------------------------------------|
| COA    | Chart of Accounts hierarchy of Asset, Liability, Equity, Income and Expense.   |
| Cohort | A class/year or department/semester shared by academics, attendance and exams. |

| Term               | Meaning                                                                  |
|--------------------|--------------------------------------------------------------------------|
| SOS                | Scheme of Study: approved, dated topic plan for a subject assignment.    |
| Posted             | Final journal state included in official balances and reports.           |
| Reversal           | Equal opposite accounting entry that corrects without deleting.          |
| Advance credit     | Student overpayment retained for future charges.                         |
| Reconciliation     | Matching posted bank/cash lines to a statement without changing amounts. |
| Unassigned         | Flagged migrated record whose mapping could not be determined safely.    |
| Class Incharge     | Responsibility for class oversight and student leave decisions.          |
| Attendance Officer | Campus responsibility marking both student and staff attendance.         |

## Responsibility handoff

- ☐ Incoming employee has a named active login.
- ☐ Campus responsibilities match the job description.
- ☐ Old employee session/access is disabled or archived.
- ☐ Open drafts, approvals, missed award lists and unreconciled items are documented.
- ☐ Temporary passwords and sensitive references are transferred securely.
- ☐ The handoff includes relevant chapters of this manual.

**End of manual.** For a system correction, identify the responsible module and use its controlled edit, reopen, deactivate or reversal workflow. For a technical fault, preserve the record reference and contact the platform support owner.