# SLMS360

## Introduction:

### Overview:

SLMS360 is an all-in-one childcare management solution tailored for schools and colleges. Our software and app simplify daily operations, enabling seamless monitoring, dynamic planning, and efficient communication. With features like attendance and accounts management, SLMS360 empowers educators to focus on nurturing and educating, ensuring the best care and education.

### Navigation:

Steps:

1. Go to the following link to view SLMS360 website <https://slms360.com/>
2. Click on **About Us** from the navigation bar.
3. You will be directed to the page introducing SLMS360.

Notes:

1. Make sure you have an internet connection to view this website.
2. The site is best viewed on a desktop or tablet for full feature visibility.

Tags:

website, navigation, about us, introduction, SLMS360

## Sign In:

### Overview:

The sign in module helps secure sign ins to client portal maintaining security and client data privacy with options like login, forget password.

### Navigation:

Steps:

1. Go to SLMS360 website <https://slms360.com/>.
2. Click on Sign In from the navigation bar.
3. You will be directed to Login Page.

Notes:

1. Make sure your internet connection is stable before logging in.
2. If the login page doesn't load, try refreshing the browser or clearing cache.

Tags:

sign in, navigation, login page, access portal

### Login:

Steps:

1. Enter Email and Password as given by the administrator.
2. Click the **Login** button.
3. If credentials are correct, you will be directed to client dashboard.

Notes:

1. Passwords are case-sensitive.
2. If login fails, check with the admin to confirm your credentials or reset them.

Tags:

login, email, password, client portal, dashboard access

### Forget Password:

Steps:

1. Click on the Forget password link under Login button on login page.
2. You will be directed to reset password page.
3. Enter your email in the input field.
4. Click on Email Password button.
5. A password will be sent to your mail.
6. Use the new password to log in again.

Notes:

1. Make sure to check your spam or junk folder if you don’t receive the reset email.
2. Reset links or new passwords may expire after a limited time for security reasons.
3. Contact support if your registered email is not recognized.

Tags:

forgot password, reset password, recover account, email reset, login help

## Client Dashboard:

### Overview:

The SLMS360 Dashboard provides a centralized entry point for accessing all core modules of the platform. It allows clients to manage operations like HRMS, CMS, Students, Accounts, Exams, and more from a single interface. Each module is represented as a clickable card with a description and icon for intuitive access.

### Navigation:

Steps:

1. Open your browser and go to <https://slms360.com>.
2. Click the **Sign In** button from the top navigation bar.
3. Enter your **Email** and **Password** as provided by the administrator.
4. Click the **Login** button.
5. You will be redirected to the **Dashboard** automatically upon successful login.

Notes:

1. Ensure your internet connection is stable, and browser cache is cleared if the dashboard fails to load.

Tags:

dashboard, home screen, module access, tiles, user portal, main menu, client panel

### Dashboard Layout:

Purpose:

To provide an overview of the available modules and their function within the SLMS360 dashboard.

Module Information:

1. **HRMS** allows management of staff, designations, attendance, salaries, holidays, leaves and more.
2. **CMS** allows management of subscriptions, branches, classrooms, app configuration and more.
3. **Students module** allows management of student attendance, cards, transfers, withdrawals and more.
4. **Accounts module** allows management of vouchers, student accounts and more
5. **Exams module** allows management of Manage student marks, result cards, and scholarships and more.
6. **Marketing** module allows management of complaints, marketing and more.
7. **Inventory Management** allows management of categories, products, orders and more.
8. **Activity Logs** allow management of staff logs, salary logs and more.
9. **Help & Support module** allows management of support tickets, email support, live calls and more.

Notes:

1. Module visibility depends on the client’s permissions.
2. Alert icons/badges indicates pending actions.
3. The Region Switcher at the top (East, West, North, South Lahore) filters the dashboard content based on location.

Tags:

dashboard, modules, client portal, navigation, login, homepage, access control, main screen

## HRMS:

### Overview:

The **HRMS (Human Resource Management System)** module in SLMS360 enables institutions to efficiently manage all aspects of their workforce operations. From maintaining staff records and attendance to processing salaries, handling leave requests, and managing shifts, HRMS provides a centralized solution to ensure HR-related tasks are accurate, traceable, and secure.

### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.

Notes:

1. If the HRMS tile is not visible, you may not have the correct role or permission level.
2. The region selected (e.g., East, West, North, South Lahore) may affect visible staff or data.

Tags:

HRMS, HR management, dashboard, access, modules, login navigation.

#### Layout

1. **Staff module** has functionality to create and manage staff records, designations, permissions, and account status.
2. **Staff Attendance** has functionality to record and track attendance entries and maintain attendance history.
3. **Holidays module** has functionality to set and manage institutional holidays.
4. **Leave Requests module** has the functionality to submit, approve, or reject employee leave requests.
5. **Manage Salaries** has the functionality to configure payroll, salaries, deductions, and benefits.
6. **Shift Management** has functionality to organize staff into shifts and configure shift timings and changes.
7. **Salary Claims** has the functionality to submit and approve salary related claims such as corrections or bonuses.
8. **Attendance Claims** has the functionality to handle attendance discrepancies submitted by staff for approval or rejection.
9. **Staff Adjustments** has the functionality to manage balance adjustments including debit or credit entries for staff records.

Notes:

1. Sub-module access depends on user permissions.
2. Each tile within the HRMS module links to a separate tool or form for performing related actions.

Tags:

HRMS, staff management, attendance, salaries, leaves, payroll, HR tools, internal operations.

### Staff:

#### Overview:

The **Staff** section under HRMS allows administrators to create, view, and manage employee records, including designations, contact details, permissions, and work profiles. It centralizes all critical employee data and supports real-time updates, permission toggling, and multi-branch assignments, making it easier to manage staff across campuses or regions.

#### Navigation

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available sub-modules.
4. Select the **Staff** card from the HR Management panel.
5. You will be directed to the Staff Management screen, where a list of employees is displayed.

Notes:

1. Make sure your user role has HR access rights to view or edit staff details.
2. Data displayed may vary based on selected **region filter** (e.g., East, North, West Lahore).

Tags:

staff, HR, employees, personnel, access staff records, navigation.

#### View Staff:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Select the **Staff** card from the HR Management panel.
5. Here you will see all the available staff that are currently enrolled.
6. Staff data will be displayed in tabular form with details such as Status, Staff ID, Name, Email, Contact, Branches, Joining Date, Date of Birth, Remote, Country, Blood Group and CNIC.
7. You can search for staff from the search field in the table.

Notes:

1. Click the three-dot menu beside each staff row to access more actions.
2. The table supports pagination and adjustable record limits.

Tags:

view staff, staff list, employee records, table, directory

#### Add Staff:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Select the **Staff** card from the HR Management panel.
5. Click on the Add Staff button from the top right of the screen.
6. A form will open in a modal with a lot of fields.
7. Fill all the fields about **Personal Info**: (Name, Email, CNIC, Country, Phone, Blood Group), **Work Info** (Branch(es), Designation, Shift, Joining Date, Hierarchy Parent), **Additional** Details (Date of Birth, Remote status, Annual Leaves).
8. Use the **Permissions** panel on the right to give module-specific access (e.g., Accounts, CMS).
9. Click **Submit** to add the new staff member or **Cancel** to discard.
10. New Staff member will be added and shown in the table.

Notes:

1. All fields marked required must be filled before submission.

Tags:

add staff, register employee, new hire, HRMS staff entry, staff permissions

#### Update Staff:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Select the **Staff** card from the HR Management panel
5. On the staff table, click the name of the staff member whom you want to edit.
6. The form opens with pre-filled with the staff member’s existing data.
7. Make updates as needed.
8. You can also select a profile image for that staff member.
9. Click **Submit** to save changes.

Notes:

1. Only authorized users can update staff information.
2. Deduction rules (Lates Allowed, Deduction Days, Percent) may auto-display based on the shift.

Tags:

update staff, edit employees, change profile, update permissions, modify HR record.

#### Manage Salary:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Select the **Staff** card from the HR Management panel
5. In the staff table, click the three-dot menu next to a staff record.
6. Select **Salary** from the dropdown.
7. A form titled **Salary Information** will open.
8. Fill the fields such as Monthly Salary, Travel Allowance, Medical, House Rent, Mobile, Tax Deduction Percentage, Fixed Tax Amount.
9. Click on update to set/update the salary.

Notes:

1. Set fields to zero if not applicable.
2. Setting and updating is done from the same form
3. Tax deductions can be defined either as a percentage or fixed value, based on organization policy.

Tags:

salary, monthly pay, travel allowance, tax deduction, staff payroll, HRMS salary

#### Manage Accounts:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Select the **Staff** card from the HR Management panel
5. In the staff table, click the three-dot menu next to a staff record in the table.
6. Click on the Account Info.
7. The **Account Information** form will appear.
8. Enter the banking details such as Bank Country, Bank Name, Bank Code, Bank Account Number, Account Holder Name, IBAN Number, ABA Routing Number, Bank Identifier Code (SWIFT/BIC).
9. Click **Update** to save the information.
10. Account Information will be set/updated and saved.

Notes:

1. Ensure banking information is accurate to avoid disbursement errors.
2. Setting and updating is done from the same form
3. Only HR admins or finance officers should be permitted to edit this section.

Tags:

bank details, account info, salary disbursement, IBAN, SWIFT, HRMS banking

#### Manage Hierarchy:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Select the **Staff** card from the HR Management panel
5. In the staff table, click the three-dot menu next to a staff record in the table.
6. Click on the Manage Hierarchy.
7. A modal will open showing the currently assigned supervisor or hierarchy parent.
8. Use the dropdown to select a new **Hierarchy Parent**.
9. The hierarchy parent when selected will be shown in the list below.
10. Click on the save button to save the changes.

Notes:

1. Hierarchy data helps in structuring role-based access, approvals, and leave workflows.
2. Each staff member can report to only one direct superior in the system.

Tags:

hierarchy, reporting structure, manager assignment, org chart, HRMS relationships

### Holidays:

#### Overview:

The **Holidays** module allows administrators to define and manage official holidays for their organization. It supports creating national, religious, or custom holidays across multiple branches or regions. All configured holidays are visible to staff and integrated with attendance calculations and payroll.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Select the **Holidays** card from the HR Management panel.
5. You will be redirected to the Holidays Management page.

Notes:

1. Permissions may affect management of holidays.

Tags:

holidays, holiday management, HRMS calendar, organization leave days.

#### View Holidays:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Select the **Holidays** card from the HR Management panel.
5. You will be redirected to the Holidays Management page.
6. Here you can view all the holidays in tabular form.
7. Details such as Title, Holiday Date, Country and Description will be shown.
8. Click on the exclamatory icon under the Description Column to view Holiday Description.

Notes:

1. Holidays can be turned off temporarily using the toggle switch.

Tags:

view holidays, holiday list, holidays, view active holidays, view inactive holidays.

#### Add Holiday:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Select the **Holidays** card from the HR Management panel.
5. You will be redirected to the Holidays Management page.
6. Click on the Add Holiday button from the top right corner of the screen.
7. A new form will appear with fields such as Title, Country, Holiday From, Holiday To, Description.
8. Fill these fields and click submit
9. New Holiday(s) will be added and shown in the table.

Notes:

1. Descriptions help staff understand the purpose of less common holidays.

Tags:

add holiday, create holiday, new holiday, submit holiday, HRMS Holiday.

#### Change Holiday Status:

Steps:

1. On the Dashboard, click the HRMS card.
2. You will be redirected to the HR Management panel, displaying all available modules.
3. Select the **Holidays** card from the HR Management panel.
4. You will be redirected to the Holidays Management page.
5. Toggle the button under the action’s column along the row of the table whose status you want to change.
6. Status will be changed according to the previous state and users will be shown a success message.

Notes:

1. Status can be changed any number of times.

Tags:

change holiday status, toggle holiday, change holiday, HRMS Holiday change.

### Staff Attendance:

#### Overview:

The **Staff Attendance** module allows clients to monitor, review, and update employee attendance records. It supports both **branch-level summaries** for a specific date and **individual staff attendance history**, ensuring accurate payroll integration and HR auditing.

#### Navigation

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Staff Attendance Card.
5. You will be redirected to the Staff Attendance module where there will be two option such as Daily Branch Attendance and Single Staff Attendance.

Notes:

1. Date or month selection is mandatory in both views.
2. Region selector (East, West, North, South Lahore) filters staff per branch.

Tags:

staff attendance, HR attendance, daily log, attendance history, HRMS check-in.

#### View Daily Branch Attendance:

Overview:

This module helps to view and monitor attendance records of all staff for a selected date within a specific branch.

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Staff Attendance Card.
5. Open the Daily Branch Attendance tab.
6. Select a date and click Submit.
7. A table will appear will branch attention details such as Sr No, Staff Name, Check In Time, Check Out Time, Working Time and status.

Notes:

1. Status badges are color-coded for quick reference.
2. Check-in and check-out times are captured through QR code scan.
3. You can search for records through the search field in the table.

Tags:

daily attendance, branch-wise attendance, present/absent, holiday tracking.

#### View Single Staff Attendance:

Overview:

This module has functionality to view an individual staff member's monthly attendance summary.

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Staff Attendance Card.
5. Open the Single Staff Attendance tab.
6. Select Month, Year and Staff member name and click Submit.
7. The screen will show Profile block with Staff ID, image, and joining date and total working time for the selected month.
8. There will be a table under the profile block which will have details such as Date, Day, Check-in/out times, Working Time, and Status.

Notes:

1. Days marked as Holiday, Leave, or Absent are excluded from totals.
2. You can search for records through the search field in the table.

Tags:

staff attendance history, single employee attendance, monthly summary, check-in details.

#### Change Staff Attendance Status:

Overview:

This module has functionality to change the status of an individual staff member's attendance.

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Staff Attendance Card.
5. Open the Single Staff Attendance tab.
6. Select Month, Year and Staff member name and click Submit.
7. The screen will show Profile block with Staff ID, image, and joining date and total working time for the selected month.
8. There will be a table under the profile block which will have details such as Date, Day, Check-in/out times, Working Time, and Status.
9. Click on the three dots icon in the row whose status you want to change.
10. Click update.
11. A modal will appear will select field allowing you to select status such as Present, Absent, Holiday, Leave, Unpaid Leave, Late, Early Off, Unpaid Late, Unpaid Early Off, Remote Work, Unaffected Days, Short Leave and Early Off Absent.
12. Select a status and click submit.
13. Attendance status will be updated and reflected in the table.

Notes:

1. Updating statuses impacts payroll and attendance reports.
2. Only authorized HR users should be allowed to override statuses.

Tags:

update attendance, override status, present absent edit, correct log, late entry fix.

### Leave Requests:

#### Overview:

The **Leave Requests** module allows HRs to view, review, approve, or reject leave requests submitted by employees. It provides full visibility into leave types, dates, reasons, and balances. This ensures accurate leave tracking and alignment with attendance and payroll.

#### Navigation:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Leave Requests Card.
5. You will be directed to the Leave Requests page where you can see all the requests.

Notes:

1. Each request will have status with it.

Tags:

leave management, leave requests, HRMS approval, employee leave.

#### View Leave Requests:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Leave Requests Card.
5. You will be directed to the Leave Requests page where you can see all the requests.
6. All the details will be shown in the form of a table such as Sr., Staff Name, Staff ID, Leave From, Leave Till, Leave Type, Status, Reason, Attachment, Reviewed By and Action.
7. You can also filter results through search.

Notes:

1. The status column uses colored badges for quick visibility.
2. Click the icon under Reason to preview the full message.
3. Click on the attachment icon under Attachment column to view the attachment.

Tags:

view leave, pending leaves, staff leave list, leave type, leave dates.

#### Manage Leaves:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Leave Requests Card.
5. You will be directed to the Leave Requests page where you can see all the requests.
6. Click on the actions button.
7. This will open a modal with complete leave details for that employee such as leaves allowed, casual leaves, medical leaves, bereavement leaves and other leaves.
8. It will also show details such as Paid leave days and unpaid leave days and applied leave details.
9. Select your response that you want like approve or reject the leave, whether you want leave to be paid, unpaid and write the reason for your decision.
10. Click on submit.
11. Leave requests will be dealt with and shown on the app side to the user and also reflected in the table.

Notes:

1. Once approved or rejected, the request is locked and logged.

Tags:

approve leave, reject leave, process request, review leave, HR leave action.

### Manage Salaries:

#### Overview:

The **Manage Salaries** module provides a centralized system to compute, review, approve, and print monthly salary records for employees. It considers attendance, leave types, late marks, deductions, and prior balances to automatically calculate payroll. The process is supported by a **two-level approval workflow**, allowing Level 1 and Level 2 approvals based on permissions.

#### Navigation:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Manage Salaries Card.
5. You will be redirected to the salary management page.

Notes:

1. You must select a month/year combination to proceed.
2. Region selectors (East/West/North/South Lahore) affect filtered staff data.

Tags:

salary management, payroll, HRMS salaries, monthly salary lookup.

#### Generate Salary:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Manage Salaries Card.
5. You will be redirected to the salary management page.
6. After selecting the month/year, if no record is found, click **Post Salary** in the popup.
7. The system will give a success message, and salary will be posted successfully.
8. Search again to view it.

Notes:

1. Ensure attendance is fully updated before posting salaries.
2. Once posted, data becomes available for review and approvals.

Tags:

generate salary, post payroll, salary calculation, initiate salary.

#### View Salary:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Manage Salaries Card.
5. You will be redirected to the salary management page.
6. Under Pending Tab Select the month/year.
7. Click submit
8. Salary record will be shown if available in the form of table.
9. Details such as Staff Name, Net Salary, Monthly Salary, Tax, Prev Balance, TA, Total Days, leaves, Absent, Present, Late, Holidays, Early Off, Unpaid Early Off, Unpaid Lates, Unpaid Leaves, Unaffected Days, Unprocessed Days, Leave Deductions, Early Off Deductions, Late Deductions, Absent Deductions, Unaffected Deductions, Short Leave Deductions and Early Off Deductions.
10. Summarized Details will be shown under the table such as Total Salary, Total Early Off Deductions, Total Late Deductions, Total Absent Deductions, Total Short Leaves Deductions, Total Early Off Absent Deductions.
11. You can also print records using the button above the table.

Notes:

1. Color badges help visually identify deduction-heavy or zero-net salaries.
2. Clicking the **dropdown menu** next to staff names reveals additional options.
3. You can also view salary under L1 approvals tab and L2 approvals tab based on permissions.

Tags:

salary details, deduction breakdown, net salary, total pay.

#### Regenerate Salary:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Manage Salaries Card.
5. You will be redirected to the salary management page.
6. Select the month/year.
7. Click submit
8. Salary record will be shown if available in form of table.
9. Click on three dots along the row of the table whose salary you want to regenerate.
10. Click regenerate
11. Salary will be regenerated and shown in the table.

Notes:

1. Only users with finance/admin rights should regenerate.
2. Ensure all dependent records (attendance, adjustments) are finalized before regenerating.

Tags:

fix salary, recalculate pay, regenerate payroll, update calculation.

#### Approve Salary:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Manage Salaries Card.
5. You will be redirected to the salary management page.
6. Select the month/year.
7. Click submit
8. Salary record will be shown if available in the form of table.
9. Go to the **Pending** tab in Salary Management.
10. Select the rows or select all whom you want to approve.
11. An approve salary button will appear on top of the table.  
    Click on it and salary will be approved based on your permission (L1 or L2).
12. Salary will be shown under the relevant approval tab accordingly.

Notes:

1. Only Level 1/2 users can approve at their respective stages.
2. Approval is final — regeneration or rejection must occur before this step if corrections are needed.

Tags:

approve payroll, level 1 approval, level 2 approval, salary finalization.

#### Print Salary Slip:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Manage Salaries Card.
5. You will be redirected to the salary management page.
6. Select the month/year.
7. Click submit
8. Details will be shown on the table below.
9. Click on the three dots along the row of the table whose record you want to print
10. Click on the Print Salary button.
11. A salary slip will open with salary breakdown details such as organization information, employee information, salary information, adjustments, notes and total net salary to be paid
12. Click **Print** or **Close** as needed.

Notes:

1. The slip includes payroll metadata (e.g., Employee ID, Designation).

Tags:

print slip, salary report, payslip, employee pay, printable payroll.

### Shift Management:

#### Overview:

The **Shift Management** module enables HR administrators to define and manage work shifts for employees. This includes configuring grace periods, early offs, deduction policies, and scheduled start/end times across weekdays. Each shift can also be associated with leave policies and penalties to ensure accurate attendance tracking and salary calculations.

#### Navigation:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Shift Management Card.
5. You will be redirected to shift management page.

Notes:

1. Shifts are presented in a tabular format, showing deduction rules, allowances, and timing per day.
2. Use the search bar to locate a specific shift by name.

Tags:

shift management, staff shifts, HRMS scheduling, shift control.

#### View Shifts:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Shift Management Card.
5. You will be redirected to shift management page.
6. All the shifts available will be shown in tabular format with details such as Shift Name, Lates Allowed, Late deduction Percentage, Early Off Allowed, Early Off Deduction Percent, Absent Deduction Days, Bereavement Leaves, Casual Leaves, Medical Leaves, Other Leaves and some other fields with Shift Timings.
7. Click the **info** icon under **Shift Timings** to view the daily check-in/out plan.

Notes:

1. These settings affect how attendance and salary deductions are applied.
2. Each shift acts as a template for employee assignments.

Tags:

view shift, attendance rules, HR shift list, staff policies.

#### View Shift Timings:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Shift Management Card.
5. You will be redirected to shift management page.
6. All the shifts available will be shown in tabular format.
7. Click on the exclamatory icon under the timings field along the row of the table whose timing you want to view.
8. A modal will open with shift details.
9. Details such as Day, Check In Time, Check Out Time, Grace Time will be shown.

Notes:

1. This is a read-only popup and cannot be edited directly.
2. Help HR preview shift behavior before editing.

Tags:

shift timings, working hours, daily schedule, HR overview.

#### Add New Shift:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Shift Management Card.
5. You will be redirected to shift management page.
6. Click on the Add Shift button on the top right of the page.
7. A form will open.
8. Fill all the fields such as Shift Name, Late fields, Early Off Fields, Absent Fields, Leaves, Deductions amounts.
9. Then fill the table below to save Shift timings.
10. Set fields such as Holiday days, Start Time, Grace Time, End Time, Early Off minutes, Short Leave Minutes.
11. Click **Submit** to save or **Cancel** to discard.  
    Details will be saved and shown In the table.

Notes:

1. Grace Time allows minor delays before marking Late.

Tags:

create shift, add working schedule, configure HR shift, shift setup.

#### Update Shifts:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Shift Management Card.
5. You will be redirected to shift management page.
6. Click on the Add Shift button on the top right of the page.
7. Click on the name of the shift to open update form.
8. A form will open with pre filled details of that shift.
9. Edit all the shift details fields that require changing.
10. Edit all the shift timing fields that require changing.
11. Click **Submit** to save or **Cancel** to discard.  
    Details will be saved and shown In the table.

Notes:

1. Changing shift settings affects all staff assigned to that shift.
2. Ensure alignment with company policy before applying updates.

Tags:

update shift, edit schedule, change working hours, shift correction.

### Salary Claims:

#### Overview:

The **Salary Claims** module enables HR personnel to review and respond to salary-related concerns submitted by employees. These claims may involve incorrect deductions, miscalculations, or adjustment requests. Each claim includes employee remarks and optionally triggers salary regeneration if approved.

#### Navigation:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Salary Claims Card.
5. You will be redirected to the Salary Claims management page.

Notes:

1. A red badge on the salary claims card indicates new or pending claim entries.

Tags:

salary claim, HR complaint, payroll issue, request resolution

#### View Salary Claims:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Salary Claims Card.
5. You will be redirected to the Salary Claims management page.
6. All the Pending Claims will be shown here with details such as Staff ID, Staff Name and Remarks.
7. You can view the claim by the employee under the remarks column of any row.
8. You can search for claims if needed from the search field.

Notes:

1. Claims remain pending until explicitly approved or rejected.

Tags:

view claim, salary complaint, employee issues, pending claims.

#### Manage Claims:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Salary Claims Card.
5. You will be redirected to the Salary Claims management page.
6. All the Pending Claims will be shown here with details such as Staff ID, Staff Name and Remarks.
7. Click on the actions button at the end of the row of which you want to reply.
8. A modal will open with claim as remarks from the user side, and a form below.
9. Approve or reject the claim by selecting the appropriate tab.
10. For approval give comments and select regenerate salary field.
11. For rejection give remarks only.
12. Click the submit button and reply will be sent to the employee.

Notes:

1. If **Regenerate Salary is Yes**, the system will automatically trigger recalculation of salary data.
2. Rejected claims are moved to the **Closed** tab and locked.

Tags:

approve claim, reject claim, regenerate payroll, resolve salary complaint

### Attendance Claims:

#### Overview:

The **Attendance Claims** module enables employees to submit attendance claims requests for incorrect or missing attendance entries. HR staff can review these claims, view remarks, and update the attendance status (e.g., Present, Absent, Late). This module ensures accurate attendance data before payroll processing.

#### Navigation:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Attendance Claims Card.
5. You will be redirected to the Attendance Claims management page.

Notes:

1. Red badge indicator shows the number of new/unread claims.
2. Claims are sorted by date, with search functionality for filtering.

Tags:

attendance correction, HR claims, time logs, adjustment requests.

#### View Attendance Claims:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Attendance Claims Card.
5. You will be redirected to the Attendance Claims management page.
6. On the **Pending** tab, view the list of claims showing Staff ID and Name, Attendance Date, Check In and Check Out, Remarks.
7. Click on the icon under the remarks column to view details of the claim.

Notes:

1. Claims with "N/A" in time fields typically indicate missing check-ins or device failure.
2. Staff-submitted remarks provide context.

Tags:

pending attendance, view correction, log issues, staff timesheet.

#### Manage Attendance Claims:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Attendance Claims Card.
5. You will be redirected to the Attendance Claims management page.
6. On the **Pending** tab, in the table click on the Actions button at the end of the row of whom you want to edit.
7. In the modal that opens you can view the claims of the employee.
8. Under that you can select approve or reject tab.
9. If approve tab is selected then you can give comments about your approval and select Attendance Status from the select field.
10. In case of reject tab you can just give comments.
11. Click Submit and reply will be sent to staff.

Notes:

1. Approved statuses directly update attendance logs for payroll calculations.
2. Rejected claims are moved to the Closed tab.

Tags:

approve attendance, reject correction, set attendance status, log update, review claim.

### Staff Adjustments:

#### Overview:

The **Staff Adjustments** module allows HR users to apply manual debit or credit adjustments to employee payrolls. These adjustments are logged as part of the previous balance and can impact on the net salary for a given month. Examples include bonuses, penalties, or prior-month corrections.

#### Navigation:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Staff Adjustments Card.
5. You will be redirected to Staff Adjustments page.

Notes:

1. The search bar helps quickly locate staff with existing entries.
2. Adjustments are listed with their title, type (credit or debit), and total amount.

Tags:

salary adjustment, manual correction, payroll modification, HRMS adjustment entry

#### View Staff Adjustments:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Staff Adjustments Card.
5. You will be redirected to Staff Adjustments page.
6. Select Month and Year.
7. A table will load with related data with details such as Title, Month, Year, Type of adjustment, Total Amount.
8. You can also search for any adjustment from the table.

Notes:

1. Credit adds to salary; debit subtracts from it.
2. Only HR/Admin roles can modify or remove entries.

Tags:

view adjustments, previous balance, credit entry, penalty log, bonus log

#### Add Adjustments:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Staff Adjustments Card.
5. You will be redirected to Staff Adjustments page.
6. Click on Add Staff button from the top right of the screen.
7. A form will open where you will enter fields such as Title, Month, Year, Staff, Adjustment Type, Amount.
8. Click Submit and adjustment will be saved in the table.

Notes:

1. Adjustments are applied to the selected month’s payroll.
2. Keep titles clear and descriptive for audit clarity.

Tags:

add adjustment, credit staff, deduct from salary, balance entry, payroll add-on

#### Delete Staff Adjustments:

Steps:

1. Login to your client portal.
2. On the Dashboard, click the HRMS card.
3. You will be redirected to the HR Management panel, displaying all available modules.
4. Click on Staff Adjustments Card.
5. You will be redirected to the Staff Adjustments page.
6. Select Month and Year.
7. A table will load with related data with details such as Title, Month, Year, Type of adjustment, Total Amount.
8. Click on the delete Icon along the row of the adjustment that you want to delete.

Notes:

1. Credit adds to salary; debit subtracts from it.
2. Only HR/Admin roles can modify or remove entries.

Tags:

delete adjustments, delete previous balance, delete credit entry, delete penalty log.

## CMS:

### Overview:

The **CMS module** in SLMS360 enables centralized configuration and control over multiple operational areas including branches, classrooms, app settings, subjects, fee templates, and book lists. It provides a flexible foundation for tailoring the platform to the specific structure and needs of an institution.

### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard, click the CMS card.
3. You will be redirected to the CMS panel featuring multiple configuration options such as Branch Management, App configurations, Classrooms, Fee Templates, Subjects and Book List.

Notes:

1. CMS access may be limited to super-admin or configuration roles.
2. Each section opens a dedicated workspace with forms, lists, and filters.

Tags:

CMS access, configuration tools, manage branches, setup modules, SLMS360 CMS navigation.

### CMS Layout:

Overview:

The CMS layout offers different cards, each having its own structure and features to be used by the client in SMLS360.

Layout:

1. **Branch Management** has the functionality of Add, edit, and oversee branches or franchises.
2. **App Configuration** has functionality to customize general settings like organization name, logos, socials behaviors and bank information.
3. **Classrooms** have functionality to create and manage classroom names, sections, and designations.
4. **Fee Templates** have the functionality to define class-wise fee structures across branches.
5. **Subjects** have functionality to add and update subjects used in academic modules.
6. **Book List** has functionality to maintain a centralized list of books per branch and class.

Notes:

1. CMS items may typically include add, update, status toggle, and view functionality.
2. Data added through CMS auto-integrates with relevant modules (e.g., branch reflect in classrooms and Book List).

Tags:

CMS layout, centralized settings, branch setup, classroom config, fee structure, subject management, SLMS360 configuration.

### Branch Management:

#### Overview:

The **Branch Management** feature in SLMS360 allows administrators to manage multiple school branches or franchises in one centralized panel. Users can add, update, and view detailed information for each branch, as well as access unique QR codes for identification and integration.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. On the **Dashboard**, click the **CMS** card.
3. In the CMS panel, click the **Branch Management** card.
4. You will be redirected to the Branch Management table view.

Notes:

1. Only users with CMS configuration rights can manage branches.
2. The table provides a real-time view of all branches.

Tags:

branch navigation, manage branches, CMS access, SLMS360 locations.

#### View Branches:

Steps:

1. Log in to your SLMS360 client account.
2. On the **Dashboard**, click the **CMS** card.
3. In the CMS panel, click the **Branch Management** card.
4. On the **Branch Management** screen, view the table listing all existing branches.
5. Each row displays Branch Name, Country, Branch QR and Branch Details.

Notes:

1. You can search for branches using the **search bar** in the top-right of the table.
2. Pagination is available for long branch lists.

Tags:

view branches, branch list, location table, SLMS360 branches.

#### Add Branch:

Steps:

1. Log in to your SLMS360 client account.
2. On the **Dashboard**, click the **CMS** card.
3. In the CMS panel, click the **Branch Management** card
4. On the **Branch Management** screen, click the **Add Branch** button on the top-right.
5. Fill in the required fields in the pop-up form like Name, Country, Email, Contact, Latitude, Longitude, Timezone, Address, Branch Manager, Is Franchise (Yes/No), Currency, Rent, Late Fee percentage and Fixed Late Fee Charges.
6. Click **Submit** to save the new branch.
7. The branch will be shown in table.

Notes:

1. Required fields must be filled accurately.
2. Branches are added instantly to the table after submission.

Tags:

add branch, new branch, create branch, branch setup.

#### Update Branch:

Steps:

1. Log in to your SLMS360 client account.
2. On the **Dashboard**, click the **CMS** card.
3. In the CMS panel, click the **Branch Management** card.
4. In the Branch Management table, click on the Branch Name along the row of the table you want to edit.
5. A detailed view or modal will appear with editable fields.
6. The fields will be prefilled with the data added earlier.
7. Make the necessary changes and click Update or Submit.

Notes:

1. Updates are reflected immediately across modules.
2. Only editable fields will be available for modification.

Tags:

Edit branch, update branch, modify branch info, SLMS360 branch update.

#### View Branch QR Code:

Steps:

1. Log in to your **SLMS360** client account.
2. On the **Dashboard**, click the **CMS** card.
3. In the CMS panel, click the **Branch Management** card.
4. In the Branch Management table, locate the branch whose QR code you want to view.
5. Click the QR code icon corresponding to the branch along the row of the table.
6. A new page will open will branch QR code and relevant details.

Notes:

1. QR codes can be used for physical verification, check-ins, or kiosk integrations.
2. Each branch has a unique QR code.

Tags:

branch QR code, scan code, QR management, branch identity, SLMS360 QR.

#### View Branch Details:

Steps:

1. Log in to your **SLMS360** client account.
2. On the **Dashboard**, click the **CMS** card.
3. In the CMS panel, click the **Branch Management** card.
4. In the Branch Management table, locate the branch whose details you want to view.
5. Click the exclamatory icon corresponding to the branch along the row of the table.
6. A modal will open which will show that branch’s details such as Name, Country, Email, Contact, Latitude, Longitude, Timezone, Address, Branch Manager, Is Franchise (Yes/No), Currency, Rent, Late Fee percentage and Fixed Late Fee Charges.

Notes:

1. Each branch has unique details

Tags:

branch details, in-depth branch details SLMS360 branch details.

### App Configurations:

#### Overview:

The **App Configuration** section in SLMS360 allows administrators to customize organization-level settings to optimize the performance, appearance, and integration of the platform. This includes branding elements, payment gateway setup, social media links, and bank account details all in one unified panel.

#### Navigation:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click on the CMS card.
3. In the CMS panel, select the **App Configuration** card.
4. You will be redirected to the Content Management screen displaying configurable sections.

Notes:

1. Only users configuration rights can modify this section.
2. All updates are system-wide and reflect instantly.

Tags:

app configuration, branding, CMS settings, system preferences, platform setup.

#### Manage Configurations:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click on the CMS card.
3. In the CMS panel, select the **App Configuration** card.
4. You will be redirected to the Content Management screen displaying configurable sections.
5. Here you can enter details such as Organization Name, Organization Address, Logo Upload, Social Media Links, Stripe Payment Configuration keys and Bank information such as Bank name, Account Title, Account Number, Branch Name, Branch Code, Payment Instructions, Late Fee Percentage and Fixed Fee Per Day.
6. Click **Save Information** to add the details and update otherwise.

Notes:

1. All fields must be completed accurately to avoid disruptions in payment processing or branding display.
2. Stripe fields are sensitive and must be kept confidential.

Tags:

CMS configuration, stripe setup, branding, bank setup, payment gateway, organization settings.

### Classrooms:

#### Overview:

The **Classrooms** section in SLMS360 allows users to efficiently manage the academic structure by adding, organizing, and editing classrooms and their sections. It supports branch-based filtering, classroom-specific fee setup, and section hierarchy, promoting clarity and operational control across institutions.

#### Navigation:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click the **CMS** card.
3. In the CMS panel, select the **Classrooms** card.
4. You will be redirected to the Classroom Management screen.

Notes:

1. A branch selector is available at the top to filter classroom data by location.
2. Only authorized roles can manage classrooms.

Tags:

classroom navigation, academic management, CMS structure, SLMS360 classrooms.

#### View Classrooms:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click the **CMS** card.
3. In the CMS panel, select the **Classrooms** card.
4. You will be redirected to the Classroom Management screen.
5. On the Classroom Management screen, select a Branch from the dropdown and click Submit.
6. The table will display classrooms for that branch, showing details such as SR No, Classroom Name and sections.

Notes:

1. A search bar allows filtering by classroom name.
2. Pagination is available to manage long lists.

Tags:

view classrooms, list classrooms, classroom table, academic structure.

#### Add Classroom:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click the **CMS** card.
3. In the CMS panel, select the **Classrooms** card.
4. You will be redirected to the Classroom Management screen
5. Click on the **Add Classroom** button from the top right of the screen.
6. A modal will open
7. Fill in fields such as Name, Branch, Computer Fees, Stationary Fees, Ac Fees, Lab Fees, Exam Fees and Library Fees.
8. Don’t mark the checkbox of Is this a section.
9. Click submit
10. New classroom will be added and shown on the table.

Notes:

1. Fees configured here apply to the selected class only.

Tags:

add classroom, create class, assign fees, classroom setup.

#### Update Classroom:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click the **CMS** card.
3. In the CMS panel, select the **Classrooms** card.
4. You will be redirected to the Classroom Management screen
5. Click the three-dot menu at the very left of the classroom name along the row of the table whom you want to update.
6. Click Update button.
7. A modal will open with pre-filled fields from data of that row.
8. Modify the desired fields in the form except Is this a section checkbox.
9. Click **Submit** to save changes.
10. The classroom will be updated and shown in table.

Notes:

1. Fee and section flags can also be updated from here.
2. Ensure changes reflect the correct branch and academic setup.

**Tags**:

update classroom, modify class, update fees, classroom edit.

#### View Sections:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click the **CMS** card.
3. In the CMS panel, select the **Classrooms** card.
4. You will be redirected to the Classroom Management screen
5. In the Sections column of the classroom table, click the info icon for any classroom whose sections you want to view.
6. A modal will display a list of sections under that classroom with details such as Sr no and Section name.

Notes:

1. Sections are organized under classrooms and can be individually updated.
2. Sections inherit the branch from their parent classroom.

Tags:

view sections, classroom hierarchy, section list, nested classrooms.

#### Add Section:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click the **CMS** card.
3. In the CMS panel, select the **Classrooms** card.
4. You will be redirected to the Classroom Management screen
5. Click on the **Add Classroom** button from the top right of the screen.
6. A modal will open.
7. Fill in fields such as Name, Branch, Computer Fees, Stationary Fees, Ac Fees, Lab Fees, Exam Fees and Library Fees.
8. Mark the checkbox of Is this a section and select parent classroom.
9. Click submit.
10. A new section will be added and shown on the table along the row of that class.

Notes:

1. Fees configured here apply to the selected section only.

Tags:

add section, create section, assign fees, section setup.

#### Update Section:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click the **CMS** card.
3. In the CMS panel, select the **Classrooms** card.
4. You will be redirected to the Classroom Management screen
5. In the Sections column of the classroom table, click the info icon for any classroom whose sections you want to view.
6. A modal will display a list of sections under that classroom with details such as Sr no and Section name.
7. Click the three-dot menu on the very left along the row of the section name whom you want to update.
8. Click Update button.
9. A modal will open with pre-filled fields from data such as , Branch, Computer Fees, Stationary Fees, Ac Fees, Lab Fees, Exam Fees and Library Fees.
10. Modify the desired fields in the form.
11. Mark the checkbox of Is this a section and select parent classroom.
12. Click submit.
13. Click **Submit** to save changes.
14. The section will be updated and shown in table.

Notes:

1. Fee and section flags can also be updated from here.
2. Ensure changes reflect the correct branch and academic setup.

**Tags**:

update section, modify section, update fees, section edit.

### Fee Template:

Overview:

The **Fee Templates** module allows clients to create and manage structured, class-wise fee packages across different branches. This ensures consistency, flexibility, and transparency in student billing by assigning detailed fee heads (e.g., tuition, transport, exam fees) to each class.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the **Dashboard**, click on the **CMS** card.
3. Click on the **Fee Templates** card within the CMS panel.
4. You will be redirected to a new page with available fee templates.

Notes:

1. Only authorized staff can access this section.
2. The fee templates are branch, class/section specific.

Tags:

fee management, template navigation, class billing, SLMS360 finance.

#### View Fee Templates:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click on the **CMS** card.
3. Click on the **Fee Templates** card within the **CMS** panel.
4. Once on the Fee Templates screen, you will see fees templates in a table with details such as title, Branch, Created By, Created At and a toggle button to change status.
5. Use the search bar on the top right to locate specific templates.

Notes:

1. Only active templates are usable in billing modules.
2. Templates can be toggled off without deletion.

Tags:

view fee templates, fee structure, billing packages, template list.

Add Fee Template:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click on the **CMS** card.
3. Click on the **Fee Templates** card within the **CMS** panel.
4. Once on the Fee Templates screen, click the **Create New Template** button in the top-right corner.
5. A modal will open with fields such as title and branch
6. Enter title and branch
7. Enter values for each fee component of the desired class such as Admission, Tuition, Exam, Computer, Stationery, Library, Transport, Security Deposit.
8. Click on submit
9. The fee template will be created and shown in the table.

Notes:

1. Fee heads can be left as 0 if not applicable to that class.
2. Templates cannot be saved without at least a title and branch.

Tags:

add fee template, create billing package, fee setup, class-wise billing, finance config.

#### Update Fee Template:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click on the **CMS** card.
3. Click on the **Fee Templates** card within the **CMS** panel.
4. Once on the Fee Templates screen, click the **name** of the template along the row of the table whom you want to update.
5. A modal will open will pre-filled title and branch of that template and pre-filled fees of Admission, Tuition, Exam, Computer, Stationery, Library, Transport, Security Deposit of each class.
6. Update the title, branch and class wise fees values as desired.
7. Click on submit
8. Fee template will be updated and shown in the table.

Notes:

1. Edits are applied instantly and reflect in the table.

Tags:

update fee template, edit billing package, modify class fees, SLMS360 templates

#### Change Fee Template Status:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click on the **CMS** card.
3. Click on the **Fee Templates** card within the **CMS** panel.
4. Once on the Fee Templates screen, click the **toggle switch** along the row of the table whose template status you want to change.
5. Status will be changed depending on the previous state of that template.
6. This will be shown in the table.

Notes:

1. Status changes are applied instantly and reflect in the table.

Tags:

update fee template, edit billing package, modify class fees, SLMS360 templates

### Subjects:

#### Overview:

The **Subjects** section in SLMS360 allows clients to maintain an up-to-date academic structure by adding, viewing, and updating subjects. This ensures consistency across different modules where subjects are being used.

#### Navigation:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click the **CMS** tile.
3. Select the **Subjects** card in the CMS panel.
4. You will be redirected to the Subject Management screen.
5. Here you can view all subjects in tabular form.

Notes:

1. The subjects are in a tabular format.
2. Access to this feature is typically granted to by admins.

Tags:

subjects, manage subjects, academic setup, CMS subjects, SLMS360 course structure.

#### View Subject:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click the **CMS** tile.
3. Select the **Subjects** card in the CMS panel.
4. You will see a table listing all subjects with columns such ID and Subject Name.
5. Use the **Search** bar in the top-right corner of the table to filter subjects by name.

Notes:

1. Subject IDs are auto generated.
2. Pagination helps manage longer lists.

Tags:

view subjects, subject list, subject management, CMS subjects, SLMS360 view.

#### Add Subject:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click the **CMS** card.
3. Select the **Subjects** card in the CMS panel.
4. On the Subjects page, click the Add Subject button on top right of the screen.
5. A modal titled Add New Subject will appear.
6. Enter the subject name (e.g., "Physics").
7. Click Add to save.
8. Subject will be added and shown In the table

Notes:

1. The newly added subject will appear in the list immediately.

Tags:

Add subject, new course, subject entry, create subject, academic subject setup.

Update Subject:

Steps:

1. Log in to your **SLMS360** client account.
2. From the Dashboard, click the **CMS** card.
3. Select the **Subjects** card in the CMS panel.
4. On the Subjects list, click the three-dot menu on the left in the row of table you wish to update.
5. Select Update from the dropdown.
6. A modal titled Update Subject will appear with pre-filled subject.
7. Edit the Subject Name as needed.
8. Click Update to apply the changes or Cancel to exit.
9. The subject will be updated and shown in the table.

Notes:

1. Use this to correct spelling, rename based on curriculum changes, or unify naming standards.
2. Changes reflect across modules that use subjects.

Tags:

update subject, edit subject, rename subject, CMS academic subjects.

### Book Lists:

#### Overview:

The **Book List** feature in SLMS360 allows clients to manage recommended or required book lists for each class and branch. It includes options to input book details such as title, author, publisher, and additional notes, ensuring every classroom has a clear, well-documented resource catalog.

#### Navigation:

Steps:

1. Log in to your **SLMS360** client account.
2. Navigate to the **Dashboard**, and click on the **CMS** card.
3. Select the Book List card.
4. You will be redirected to the Book List Management screen.
5. Here you can view the booklists that are available based on branch and class.

Notes:

1. Only books related to the selected class and branch are displayed.
2. Permissions may be required to add or update book entries.

Tags:

book list, academic resources, CMS books, reading material, branch book catalog.

#### View Books List:

Steps:

1. Log in to your **SLMS360** client account.
2. Navigate to the **Dashboard** and click on the **CMS** card.
3. Select the Book List card.
4. You will be redirected to the Book List Management screen.
5. Select the appropriate **Branch** and **Classroom** from the dropdowns.
6. Click **Submit**.
7. Available book lists will be shown in a table with columns such as ID, Title, Author, Publisher and Notes.
8. Use the **Search** bar to find books by title or author.

Notes:

1. The list only shows books filtered by selected class and branch.
2. PDF export may be available using the **View PDF** button.

Tags:

view book list, book list catalog, reading book list, classroom book list, CMS book list records.

#### Add BookList:

Steps:

1. Log in to your **SLMS360** client account.
2. Navigate to the **Dashboard** and click on the **CMS** card.
3. Select the Book List card.
4. You will be redirected to the Book List Management screen.
5. Click on the add book list button on the top right of the screen.
6. A modal will open.
7. Fill in the form fields such as Branch, Classroom, Book Title, Author, Publisher and Notes.
8. Click **Add** to save the entry or **Cancel** to discard.
9. Book list will be added and shown in the table

Notes:

1. Avoid duplicates by checking existing entries first.
2. Notes help provide context for usage.

Tags:

add book list, create book list entry, assign textbook, academic reading, CMS library.

#### Update BookList:

Steps:

1. Log in to your **SLMS360** client account.
2. Navigate to the **Dashboard** and click on the **CMS** card.
3. Select the Book List card.
4. You will be redirected to the Book List Management screen.
5. Select the appropriate **Branch** and **Classroom** from the dropdowns.
6. Click **Submit**.
7. Available book lists will be shown in a table with columns such as ID, Title, Author, Publisher and Notes.
8. In the Book List table, click the name of the book list to open update modal.
9. Pre-filled fields will be available which can be updated.
10. Edit the fields you want to change and click update.
11. The fields will be updated, and book lists will be reflected in the table.

Notes:

1. Updating a book list does not affect previous entries in records.
2. Useful for correcting typos or refining book list descriptions.

Tags:

update booklist, edit booklist entry, modify textbook, CMS booklist edit

#### Change BookList Status:

Steps:

1. Log in to your **SLMS360** client account.
2. Navigate to the **Dashboard** and click on the **CMS** card.
3. Select the Book List card.
4. You will be redirected to the Book List Management screen.
5. Select the appropriate **Branch** and **Classroom** from the dropdowns.
6. Click **Submit**.
7. Available book lists will be shown in a table with columns such as ID, Title, Author, Publisher and Notes.
8. Click the three-dot menu (very left) next to a book entry.
9. Click on change status.
10. A modal will open.
11. Select desired status.
12. Click submit
13. Book lists status will be updated and reflected in the table.

Notes:

1. Inactive book lists are not shown in the records.
2. Ideal for phasing out outdated or optional book lists.

Tags:

change book status, activate book, deactivate book, CMS book toggle

View Book List PDF:  
Steps:

1. Log in to your **SLMS360** client account.
2. Navigate to the **Dashboard** and click on the **CMS** card.
3. Select the Book List card.
4. You will be redirected to the Book List Management screen.
5. Select the appropriate **Branch** and **Classroom** from the dropdowns.
6. Click **Submit**.
7. Available book lists will be shown in a table with columns such as ID, Title, Author, Publisher and Notes.
8. Click on the view PDF button on the top right above the table
9. A new screen will open in PDF format will all the book lists in form of cards.

Notes:

1. PDFs are specific for the class.

Tags:

change book status, activate book, deactivate book, CMS book toggle.

## Students:

### Overview:

The **Students module** in SLMS360 provides a centralized platform to manage every aspect of a student’s academic journey. It covers admissions, attendance, records, ID card generation, transfers, and withdrawals. Designed for efficiency and control, this module ensures that schools maintain a clean and up-to-date database while streamlining student operations across branches and classrooms.

### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, click on the Students card.
3. You will be redirected to the Student Management panel, which includes the following sections Student admissions, student records, student card, student attendance, student transfers.

Notes:

1. Only users with relevant permissions can access or modify data.
2. Each sub-module opens a dedicated interface for targeted actions.

Tags:

student management, student navigation, SLMS360 students, access student info.

### Student Layout:

1. **Student Admission** has the functionality to respond to admission requests, set student, parent interview and results, assign branches, classrooms, and guardians, set fee structures and control admission status.
2. **Student Records** has the functionality of viewing registered student information such as branch, class, section personal details and others.
3. **Student Cards** has the functionality of viewing student cards belonging to specific sections of some class.
4. **Student Attendance** has the functionality of viewing daily single student attendance records or bulk attendance records month wise.
5. **Student Promote** has the functionality of promoting students to the next academic year or class with ease and accuracy.
6. **Student Transfer** has the functionality of transferring a student seamlessly transfer students between branches or classrooms.
7. **Student Withdraw** Handle student exit processes with efficiency and clarity

Notes:

1. The layout promotes operational clarity and workflow separation.
2. Tabs/cards help users quickly jump to the relevant area of student handling.

Tags:

student layout, admission system, ID management, attendance tracking, student profiles, student promoting, student transfers, student withdraws.

### Student Admissions:

#### Overview:

The **Student Admission** module in SLMS360 allows schools to register new students using a step-by-step enrollment process. It includes capturing essential personal and guardian details, scheduling interviews and admission tests, and configuring fee templates. The process is streamlined into clearly defined stages, ensuring all aspects of admission are efficiently recorded and verified.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to the Students module.
3. Click on Student Admission Card.
4. You will be taken to the Student Admission Management screen with tabs such as Pending, In Progress, Closed.

Notes:

1. Student entries appear by admission status.
2. Status is visually labeled (e.g., Pending, In Progress).

Tags:

student admission, enrollment, new student registration, SLMS360 intake, add student.

#### View Admission Requests:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to the Students module.
3. Click on Student Admission Card.
4. You will be taken to the Student Admission Management screen specifically on the pending tab where all admission queries will be shown.
5. Details such as Student Name, Parent Name, Email, Phone, status and an Add student button will be shown.

Closed Admissions:

1. You can switch to closed tab to see all the queries that are closed or are offline.
2. Similar details as pending tab will be shown with status closed.

In Progress Admissions:

1. You can switch to In Progress tab to see all the queries that are in progress.
2. Similar details as pending tab will be shown with status in progress.

Notes

1. Filters can be applied to search specific students.
2. The system auto-categorizes each entry based on progress.
3. You must **click “+ Add Student”** in the *Pending* tab to initiate full admission.
4. The status may automatically shift to “In Progress” when basic info is saved.

Tags:

admission queries, view student requests, student applications, admission inbox, pending admissions, student onboarding, new student entries, student admission SLMS360, enrollment tracking, query list.

#### Change Status of Pending Admission Query:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to the Students module.
3. Click on Student Admission Card.
4. You will be taken to the Student Admission Management screen specifically on the pending tab where all admission queries will be shown.
5. Toggle the button along the row of the query whose status you want to change.
6. Status will be changed from pending to closed.
7. If status was changed to closed then it will be shown in closed tab and removed from the pending one.

Notes:

1. Once status changed it cannot be undone.
2. Status also changes **automatically** when an admission progresses through the form stages.

Tags:

change admission status, toggle student request, mark as closed, admission query update, in progress student, close lead, pending to active, student admission tracking, SLMS360 enrollment actions

#### In Progress Admission Queries:

Purpose

To manage admission queries that have started the student registration process but haven’t completed all required stages such as interviews or fee setup.

Steps

1. **Log in** to your SLMS360 client account.
2. From the **Dashboard**, go to the **Students** module.
3. Click the **Student Admission** card.
4. Switch to the **In Progress** tab.
5. You will see a list of admission queries where the initial form has been opened but full admission has not been finalized.
6. Each row has Student Name, Parent Name, Email, Phone Number and Status
7. To continue or complete the process for any student, click the **3-dot menu** in the Actions column, where you’ll find options such as Test Result, Schedule Student Interview, Student Interview Result, Schedule Parent Interview, Parent Interview Result and Set Fee Info.

Notes

1. An admission query appears here after the **“Add Student”** button has been clicked from the **Pending** tab but before the full registration is completed.
2. Any updates made in this tab directly impact the final admission workflow.

Tags:

in progress admissions, student admission pending steps, partial registration, ongoing admission, interview scheduling, fee setup, student admission process, query follow-up, student onboarding, SLMS360 admissions.

#### Add Student:

Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, open the Students module.
3. Click on the Student Admission card.
4. Navigate to the In Progress tab.
5. Locate the student you want to grant admission to for starting the admission process in the table.
6. Once found click on the add icon in the Add student column to start the process.
7. A multi-step admission form will open with pre-filled Student and Parent/Guardian details.

Admission Process:

The form consists of conditional sections based on YES/NO answers. Each stage appears only if the preceding one is completed or skipped.

Schedule Admission Test:

1. If you select Yes in Schedule Admission Test during Add Student Process, then a new form will appear where you will enter fields such as Test Date, Test Time, Test Venue and Assign To.
2. A mail will be sent to Parent related to admission test information.
3. If "No", the form proceeds to the next step.

Student Test Result:

1. After admission test has been completed, go to in progress tab in student admissions.
2. Click on the three dots along the row of that student whose test was completed.
3. Click Student Test Result
4. A form will open will fields such as Total Marks, Obtained Marks, Status, Remarks, Result Card.
5. Fill these fields.
6. Click Save Test Result
7. Results will be saved and this option will be unavailable in the in progress tab or marked as completed.
8. A mail will be sent to parent about the test result of their student.

Schedule Student Interview:

1. If you select Yes in Schedule Student Interview during Add Student Process, then a new form will appear where you will enter fields such as Interview Date, Interview Time, Interview Venue and Interview Assigned To.
2. A mail will be sent to Parent related to students interview information.
3. If "No", the form proceeds to the next step.

Student Interview Result:

1. After the Student Interview has been completed, go to in progress tab in student admissions.
2. Click on the three dots along the row of that student whose Interview was completed.
3. Click Student Interview Result.
4. A form will open with fields such as Interview Status and Remakrs.
5. Fill these fields.
6. Click Save Interview Result .
7. Results will be saved and this option will be unavailable in the in progress tab or marked as completed.
8. A mail will be sent to parent about the student interview result.

Schedule Parent Interview:

1. If you select Yes in Schedule Admission Test during Add Student Process, then a new form will appear where you will enter fields such as Interview Date, Interview Time, Interview Venue and Assigned To.
2. A mail will be sent to Parent related to Parent interview information.
3. If "No", the form proceeds to the next step.

Parent Interview Result:

1. After the Parent Interview has been completed, go to in progress tab in student admissions.
2. Click on the three dots along the row of that student whose Parent Interview was recently completed.
3. Click Parent Interview Result.
4. A form will open with fields such as Interview Status and Remarks.
5. Fill these fields.
6. Click Save Interview Result.
7. Results will be saved and this option will be unavailable in the in progress tab or marked as completed.

Fee Information:

1. After all the process are completed or skipped the fee info tab becomes active.
2. You can access the fee info tab from the In progress tab in student admissions.
3. You can also access the fee info tab from the student admissions form after interviews and tests are completed or skipped.
4. Once fee info button is clicked a form open which has fields such as Admission Recommendations, Branch, Classroom, Section and Fee Template and other fee checkboxes.
5. Once any fee template is selected then pre-filled fees according to that template will be shown with fields such as Tuition Fees, Admission Fees, ID Card Fees, Security Deposit which can be edited.
6. You will select Fee charge from field and select month from which you want fees to be charged from.
7. Monthly installment plan will appear below which can also be edited.
8. Once all of this is done you can click Register Student and student will be registered.

Download Fee Voucher:

1. After fee structure is fully set you will be directed to a new page.
2. Here you can download the initial fee voucher.
3. Click on download fee voucher and voucher will be downloaded.

Notes:

1. The admission process is governed by Yes/No responses. Only relevant sections appear based on what is selected in the previous step.
2. Admission Test, Student Interview, and Parent Interview are all **optional**.
3. You can start the process (e.g., schedule a test) and return later to complete results (test/interview outcomes).
4. Intermediate data is retained, and incomplete steps are visible in the **In Progress** tab with corresponding action items.
5. The fee installment grid allows monthly fee customization even after selecting a fee template.
6. Fee voucher will be downloaded in PDF format
7. Fields like Tuition, Admission, Security Deposit, etc., are editable post-template selection.
8. Once a result or section is submitted, that option **disappears** or gets **locked** in the In Progress tab, preventing duplication.

Tags:

admission test scheduling, test result submission, student interview scheduling, student interview result, parent interview scheduling, parent interview result, fee info, register student, add student flow, conditional form, partial completion, skip interview, skip test, multi-step admission, student registration, fee template, installment plan, admission process, slms360 admission, fee voucher download

### Student Records:

#### Overview:

The **Student Records** section in SLMS360 is a centralized space for viewing, managing, and updating student data after successful registration. It supports filtering by active/inactive status, allows data modification, and provides quick access to student ID cards and reset credentials.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to the Students module.
3. Click the Student Record card.
4. You will land on the Student Records Management screen.

Notes:

You must have the **relevant role permissions** to view or edit student records.

Tags:

navigation, student module, student records access, SLMS dashboard, how to open student records, students menu, SLMS360 navigation.

#### Viewing Student Records:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to the Students module.
3. Click the Student Record card.
4. You will land on the Student Records Management screen.
5. The screen displays all students under the **Active** tab
6. You can use the **Search** bar or for quick access.
7. The table will have information such as Student ID, Name, Father Info, Contact, DOB, Student Card, Classroom, Section.
8. Clicking a **student row** opens their detailed profile.

Notes:

1. Student Card icons link to individual printable ID cards.
2. Data is auto-sorted.

Tags:

view student records, active students, student info table, SLMS360 student card, student search, filter student list, SLMS school data, classroom filter, section view, student profile view

#### Updating Student Information:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to the Students module.
3. Click the Student Record card.
4. You will land on the Student Records Management screen.
5. Click any student row in the Active tab.
6. A detailed student profile page will open.
7. You can update fields like name, gender, DOB, contact, guardian info, emergency contact and profile picture of student.
8. Click on save changes.
9. All changes will be saved and reflected in the table.

Notes:

1. Changes reflect instantly on the records page after saving.

Tags:

edit student profile, update student info, change contact details, edit guardian info, update student DOB, SLMS update student, student information management.

#### Resetting Student Credentials:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to the Students module.
3. Click the Student Record card.
4. You will land on the Student Records Management screen.
5. Click any student row in the Active tab.
6. A detailed student profile page will open.
7. While viewing a student profile, click the Reset Password button.
8. A confirmation prompt will appear.
9. Click Yes, reset it to regenerate credentials.

Notes:

1. A notification is sent to the parent’s email upon resetting.
2. Use this option carefully to avoid unauthorized resets.

Tags:

reset credentials, regenerate login, student portal access, reset student password, SLMS student login, school CRM login reset, student password reset.

#### Change Student Status:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, navigate to the Students module.
3. Click on the Student Record card.
4. You will land on the Student Records Management screen.
5. By default, the Active students tab is open.
6. Locate the student whose status you want to change.
7. In the Actions column, click the toggle switch next to the student’s name.
8. If toggled from Active to Inactive, The student is moved to the Inactive tab.
9. If toggled from Inactive to Active, The student is restored to the Active list.
10. A confirmation or success message may appear indicating status has been changed successfully
11. You can switch between tabs to see reflected changes.

Notes:

1. Status toggling helps administrators manage students who leave temporarily or permanently.
2. Status change does **not delete data**; it only affects visibility and participation access.

Tags:

student status change, toggle active inactive, archive student, reactivate student, SLMS360 status toggle, deactivate student profile, manage student visibility, student records management.

### Student Cards:

#### Overview:

The **Student Card** feature in SLMS360 allows schools to manage and print official ID cards for enrolled students. This module enables filtering by branch, class, and section, and includes integrated QR codes for identification. ID cards can be selected individually or in bulk for classroom-wise printing.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. Click on the Students Card from the Dashboard.
3. In the Student Management panel, click the Student Cards card.
4. A new page will open which will be student cards page.

Notes:

1. Access is typically restricted to administrative staff.

Tags:

student ID, student card, navigation, identity card, SLMS360 card printing.

#### View Single Student Cards:

Steps:

1. Log in to your SLMS360 client account.
2. Click on the Students Card from the Dashboard.
3. In the Student Management panel, click the Student Cards card.
4. A new page will open which will be student cards page.
5. Select Branch, Class and Section from the select fields.
6. Click on Submit
7. A table will appear based on the selected fields with details such as ID, Student Name, Student Card.
8. Click the **Card icon** along the row of the table to preview the student's ID card.
9. A new screen will open where ID card will be shown with organization logo, student profile image, name, ID, class and section and QR code for that student.

**Notes**:

1. Each row represents an individual student.
2. The QR code on each card provides fast digital identification when scanned.

Tags:

view single student ID, single QR card, student profile card, student QR code.

#### Print Single Student Cards:

Steps:

1. Log in to your SLMS360 client account.
2. Click on the Students Card from the Dashboard.
3. In the Student Management panel, click the Student Cards card.
4. A new page will open which will be student cards page.
5. Select Branch, Class and Section from the select fields.
6. Click on Submit
7. A table will appear based on the selected fields with details such as ID, Student Name, Student Card.
8. Click the **Card icon** along the row of the table to preview the student's ID card.
9. A new screen will open where ID card will be shown with organization logo, student profile image, name, ID, class and section and QR code for that student.
10. You can print it by pressing CTRL and P which opens browsers print modal.

**Notes**:

1. Each row represents an individual student.
2. The QR code on each card provides fast digital identification when scanned.

Tags:

print single student ID, print single QR card, print student profile card, print single student QR code.

#### View Multiple Student Cards:

Steps:

1. Log in to your SLMS360 client account.
2. Click on the Students Card from the Dashboard.
3. In the Student Management panel, click the Student Cards card.
4. A new page will open which will be student cards page.
5. Select Branch, Class and Section from the select fields.
6. Click on Submit
7. A table will appear based on the selected fields with details such as ID, Student Name, Student Card.
8. Click the checkboxes along the rows of the table whose student card you want to view or print or mark the checkbox in table header to select all.
9. A button will appear above the top right of the table by the name of Print ID Cards.
10. Click on it
11. A new screen will appear will all the ID cards selected with details such as organization logo, student profile picture, student name, Student ID, student class and section and QR code for selected students.

**Notes**:

1. Each card represents an individual student.
2. Print is through browser.

Tags:

View bulk student ID, bulk QR card, students profile card, student QR code.

#### Print Multiple Student Cards:

Steps:

1. Log in to your SLMS360 client account.
2. Click on the Students Card from the Dashboard.
3. In the Student Management panel, click the Student Cards card.
4. A new page will open which will be student cards page.
5. Select Branch, Class and Section from the select fields.
6. Click on Submit
7. A table will appear based on the selected fields with details such as ID, Student Name, Student Card.
8. Click the checkboxes along the rows of the table whose student card you want to view or print or mark the checkbox in table header to select all.
9. A button will appear above the top right of the table by the name of Print ID Cards.
10. Click on it
11. A new screen will appear will all the ID cards selected with details such as organization logo, student profile picture, student name, Student ID, student class and section and QR code for selected students.
12. Press CTRL and P to open browser printer modal and print accordingly.

**Notes**:

1. Each card represents an individual student.
2. Print is through browser

Tags:

Print bulk student ID, Print bulk QR card, Print students profile card, Print student QR code.

### Student Attendance:

#### Overview:

The **Student Attendance** feature in SLMS360 enables schools to efficiently manage attendance records for both individual students and entire classes. This tool supports daily attendance, provides filtering options by class/section, and ensures accurate tracking through intuitive interfaces for bulk and single student attendance.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, click on the Students Card.
3. Select the Student Attendance card in the Student Management panel.
4. You will be redirected to the Attendance Management screen.
5. Here you can view sections such as bulk student attendance and single student attendance.

Notes:

1. The user must have appropriate attendance management permissions.
2. Date-specific attendance can be recorded or viewed too.

Tags:

attendance navigation, student tracking, SLMS360 presence, class attendance.

#### Layout:

1. **Bulk Student Attendance** has features viewing attendance of students in a specific month of some year with different filters of branch, class and section.
2. **Single Student Attendance** has features like viewing attendance of single student on some specific date of a month of some classroom/section.

Notes:

1. Each card represents its own feature in detail

Tags:

bulk attendance, individual attendance, daily presence, classroom attendance, SLMS360 attendance layout

### Bulk Student Attendance:

#### Overview:

The **Bulk Student Attendance** feature in SLMS360 allows teachers and administrators to record, monitor, and manage attendance for an entire class efficiently. It supports class-wide filtering by branch, class, section, and date (month/year), and provides detailed logs with time-stamped check-in/out records per student.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Students card.
3. Click on the Student Attendance card.
4. Click on Bulk Student Attendance.
5. You will be directed to bulk student attendance screen.

Notes:

1. Viewing might be related to permissions as granted by the administrator.

Tags:

bulk attendance navigate, class attendance, group presence navigation, student attendance log, SLMS360 attendance.

#### View Bulk Attendance Record:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Students card.
3. Click on the Student Attendance card.
4. Click on Bulk Student Attendance.
5. You will be directed to bulk student attendance screen.
6. On the Bulk Attendance screen select the following Classroom, Section, Month, Year.
7. Click on submit button
8. A table will be loaded with all the student names according to the filter.
9. The table will have details such as Sr., Student Name, Attendance History.

Attendance History:

1. Click on the history icon in the attendance history column of whose history you want to view.
2. A new page will open with attendance history of that student in tabular form with details such as Date, Day, Checked In, Checked Out, Check-in Acknowledged By, Checkout acknowledged By and a detail icon.

History Detail:

1. Click on the icon under the history detail column to view the history details of any row.
2. A modal will open with date of that row as heading.
3. Details like Sr., Type, Time, Acknowledged By and Acknowledged At will be shown.

Notes:

1. Viewing might be related to permissions as granted by the administrator.
2. If the acknowledgment is N/A, it means no admin confirmed the entry yet.
3. You can search within each view to quickly find specific days or students.

Tags:

bulk attendance view, student attendance records, attendance history, view class attendance, check-in logs, check-out logs, attendance tracking, student presence logs, daily attendance, monthly attendance, SLMS360 bulk attendance, attendance acknowledgment, attendance by class, attendance detail view, student check-in record, student check-out record, attendance search, attendance report.

### Single Student Attendance:

#### Overview:

The **Single Student Attendance** feature in SLMS360 is designed to help staff access and review the attendance record of an individual student on a selected date. This allows for targeted monitoring, corrections, or confirmations of a student's check-in and check-out status, complete with timestamps and acknowledgment details.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Students card.
3. Click on the Student Attendance card.
4. Click on the Single Student Attendance card.
5. You will be directed to single student attendance screen.

Notes:

1. Only users with appropriate permissions can access this panel.
2. Use this mode when you want to inspect, verify, or cross-check attendance for a specific student.

Tags:

single student attendance, attendance record, individual tracking, SLMS360 logs, student presence

#### View Single Attendance Record:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Students card.
3. Click on the Student Attendance card.
4. Click on Single Student Attendance.
5. You will be directed to single student attendance screen.
6. On the single student Attendance screen select the following Date, Classroom, Section and Student Name.
7. Click on submit button
8. The attendance table will load details such as Type, Time, Acknowledged By and Acknowledge At.

Notes:

1. If "Acknowledged By" or "Acknowledged At" shows N/A, it means no confirmation was registered.
2. You can search within the records using the search bar for quick access.

Tags:

single student attendance, check individual attendance, student presence, attendance history, check-in record, student log, attendance report, acknowledgment status, attendance by name, daily attendance SLMS360

## Accounts:

### Overview:

The **Accounts** module in SLMS360 is designed to handle all financial transactions related to the institution. It manages vouchers, fee structures, discounts, collections, pending payments, and outstanding dues. The system is divided into two sub-modules for efficient categorization and control.

### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.

Notes:

1. A red badge (e.g., 1) on a tile indicates pending actions or unapproved items.
2. All actions are permission-restricted and may differ based on user roles.

Tags:

accounts, fees, vouchers, finance, billing, pending payments

### Layout:

Steps:

The Accounts Management page consists of two primary tiles:

1. **General Vouchers** that have functionality to create, approve, reject vouchers and manage them.
2. **Student Accounts** has the functionality to manage student fee records, due balances, paid vouchers, discounts, fee corrections and more

Notes:

1. Clicking a tile navigates to the respective sub-module dashboard.
2. Users can quickly identify where action is required through notification badges.

Tags:

financial control, accounts layout, sub-modules, ledger access, school billing

### General Vouchers:

#### Overview:

The **General Vouchers** section allows authorized users to create, submit, and manage operational and financial vouchers within the organization. These vouchers can cover various payment categories such as operational expenditures, reimbursements, and other billable items. The workflow includes **creation**, **approval**, **payment processing**, and **tracking**.

Navigation:  
Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on General Vouchers.
5. You will be directed to the voucher management page.

Notes:

1. Navigation might be based on user permissions.

Tags:

Voucher management page, voucher management, vouchers, general vouchers.

#### View Vouchers:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on General Vouchers.
5. You will be directed to the voucher management page.
6. You will see all the vouchers here in tabular form with details such as Payee Name, Payable Amount, Net Tax, Categories, Description, Voucher Bills and Date.
7. There are four tabs based on the voucher status like pending, approved, rejected and paid.

Notes:

1. Vouchers will move to a relevant tab based on their status i-e pending, approved, rejected and paid.
2. You can click on the description icon to view description of that voucher.

Tags:

View voucher, see voucher, voucher detail, voucher view, general vouhcers.

#### View Voucher Bills:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on General Vouchers.
5. You will be directed to the voucher management page.
6. You will see all the vouchers here in tabular form with details such as Payee Name, Payable Amount, Net Tax, Categories, Description, Voucher Bills and Date.
7. Click on the bills icon under the voucher bills column along the row of the table whose bills you want to view.
8. A modal will open with all the pending bills available for that voucher.
9. Details such as Net Amount, Net Payable Amount, Net Tax Amount, Tax Percentage, Category, Sub-Category, Description, Remarks and Bill Image will be shown.
10. You can view other tabs as well for approved, rejected and paid voucher bills.

Notes:

1. You can click on the description icon to view description of that bill.

Tags:

View voucher bills, see voucher bills, voucher bill details, voucher bill view, general voucher bill.

#### Approve/Reject Bills:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on General Vouchers.
5. You will be directed to the voucher management page.
6. You will see all the vouchers here in tabular form.
7. Click on the bills icon under the voucher bills column along the row of the table whose bills you want to view.
8. A modal will open with all the pending bills available for that voucher.
9. Select the bills that you want to approve or reject.
10. A button will appear named approve/reject bills.
11. Click on it.
12. A modal will open where you will fill the details such as Remarks and select approve or reject checkbox.
13. Click Submit.
14. Bill’s status will be changed and will be moved to the respective tab (approved, Rejected).

Notes:

1. You can search the bills from the search field in the table.

Tags:

View voucher bills, see voucher bills, voucher bill details, voucher bill view, general voucher bill.

Create Voucher:  
Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on General Vouchers.
5. You will be directed to the voucher management page.
6. Click on the create voucher button from the top right of the page.
7. A new screen will appear where you will select the date, branch, payee name and description of the voucher.
8. Click on Add bill button under Payee Name field.
9. A new modal will open with a form “Add New Bill”.
10. Fill all the fields such as Category, Sub Category, Amount, Tax%, Net Tax, Payable Amount, Bill Attachment and Description.
11. Click on Submit.
12. Bill will appear in form of table under the date on the create voucher screen.
13. Details such as Net Amount, Net Payable Amount, Net Tax Amount, Tax Percentage, Description, Attachments will be shown in the bill table.
14. You can add more bills if you want.
15. Click submit and that voucher will be created and shown in table in pending tab.

Notes:

1. Created Vouchers will be shown in pending tab.

Tags:

Add vouchers, add voucher bills, create vouchers, create voucher bills, create general vouchers.

#### Approve/Reject Vouchers:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on General Vouchers.
5. You will be directed to the voucher management page.
6. All the vouchers will be shown in tabular form.
7. Select the voucher by marking the checkbox along the row of the table whom you want to approve or reject.
8. A button will appear on top right above the table named Approve/reject voucher.
9. Click on it.
10. A modal will open where you will write description and select approve or reject.
11. Click submit.
12. The voucher will be approved/rejected and moved to the appropriate tab.

Notes:

Approved and Rejected vouchers are immediately moved to the appropriate tabs.

Tags:

Approve vouchers, reject vouchers, manage vouchers, approve general vouchers, reject general vouchers.

#### Make/Reject Vouchers Payments:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on General Vouchers.
5. You will be directed to the voucher management page.
6. All the vouchers will be shown in tabular form.
7. Click on the Approved tab to check all the approved vouchers.
8. Here all the approved vouchers will be shown in tabular form with details such as Payee, Payable Amount, Net Tax, Categories, Description, Voucher Bills, Date and Remarks.
9. Click on the Actions icon under the Action Tab along the row of the table of whom you want to make or reject payment.
10. A modal will open, and you will add remarks and select make payment or reject payment.
11. Payment can be made by cheque, cash or bank transfer.
12. Click submit and voucher will be shown in the respective tabs.

Notes:

Approved and Rejected payments are immediately applied.

Tags:

Approve voucher payment, reject voucher payment, manage voucher payment, approve general voucher payment, reject general voucher payment.

### Student Accounts:

#### Overview:

The **Student Accounts** module in SLMS360 is designed to simplify and centralize the financial operations related to students. It enables administrators to manage **fee posts**, view **student fee records**, and perform **fee corrections or adjustments** where necessary. The system ensures transparency, accountability, and ease of access to all student financial data.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on Student Accounts.
5. You will be directed to to Student Accounts page with different modules.

Notes:

Each module has different functionality.

Tags:

Student accounts navigate, student accounts, navigate accounts.

#### Layout:

**Fee Post** has the functionality of posting of monthly or custom student fees.

**Fee Record** has the functionality of displaying all posted fee entries for students.

**Fee Corrections** have the functionality for correcting fees or adjustments to already posted fees.

Notes:

Each Module has a red number on it based on the notifications.

Tags:

Student accounts layout, student accounts management, student accounts page.

### Fee Post:

#### Overview:

The **Fee Post** module in SLMS360 allows admins to manage student fee assignments either in bulk by class (Branch Fee Post) or individually (Single Student Fee Post). It covers various fee components like Tuition, Computer, Stationery, Exam, and more. This ensures the right fee structure is applied to each student or group for a specific month and branch.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on Student Accounts.
5. Click on Fee Post Card.
6. You will be redirected to the Student Fee Post Management Page.

Notes:

Fee post can be in bulk or single student.

Tags:

Student Fee Post Navigate, Fee Post navigation, fee post bulk, fee post single.

Branch Fee Post:  
Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on Student Accounts.
5. Click on Fee Post Card.
6. You will be redirected to the Student Fee Post Management Page.
7. Under Bulk Fee post tab select fields such as Branch, Month, Year and Due Date.
8. A grid will appear showing all classes/sections under the selected branch.
9. For each row, toggle ON the applicable fee components like Tuition Fee, Computer Fee, Stationary Fee, AC Fee, Lab Fee, Exam Fee, Library Fee.
10. After selecting the relevant fee categories for all required classes, click **Submit**.
11. Fee posts will be applied for all students within the selected classes and marked with the selected categories.

Notes:

1. Toggling fee types allows granular control per class.
2. Mandatory fields include Branch, Month, Year, and Due Date.

**Tags:**  
Branch fee post, class fee post, student fee management, bulk fee posting, SLMS360 fee module

#### Single Student Fee Post:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on Student Accounts.
5. Click on Fee Post Card.
6. You will be redirected to the Student Fee Post Management Page.
7. Under Single Student Fee Post Tab fill in all fields such as Branch, Classroom, Section, Student, Month, Year and Due date.
8. A set of checkboxes will be shown for individual fee types.
9. Tick the applicable fee types (Tuition, Computer, Lab, etc.).
10. Click **Submit** to assign the fee to the specific student.

Notes:

1. Useful for applying missed or special fee entries to individual students.
2. The system ensures that only valid combinations of class and section populate relevant students.

**Tags:**  
Single student fee post, individual fee assignment, student tuition, manage student fee SLMS360

### Fee Record:

#### Overview:

The **Fee Record** module in SLMS360 allows administrators and accounts staff to **track student fee statuses**, including what has been posted, what remains unpaid, and what has been paid. It supports both **reviewing fee breakdowns** and managing **receipt submissions and confirmations**.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on Student Accounts.
5. Click on fee records.
6. You will be directed to the student fee records page.

**Notes:**

1. Each tab in fee record has different purpose.

Tags:

fee record, navigate fee record, student fee record navigation, fee record page.

#### View Fee Records:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on Student Accounts.
5. Click on fee records.
6. You will be directed to the student fee records page.
7. Under Fee Records tab select filters such as Branch, Classroom, Section, Month and Year.
8. Click Submit to load data.
9. A list of students with unpaid fees appears showing in tabular form with details such as Student Name, Classroom, Section, Due Date, Total Fee, Additional Details and Download Fee Challan icon.
10. Click on the icon under more to view addition fee details.

Notes:

1. This area shows only **unpaid** records by default; switch to **Paid** tab for settled accounts.
2. Help identify outstanding dues and payment history.

Tags:

fee record, student unpaid fees, download fee challan, student fee tracking, tuition and other fees, outstanding fees

#### Payment Receipts:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on Student Accounts.
5. Click on fee records.
6. You will be directed to the student fee records page.
7. Under Payments Receipt Tab select filters such as Branch, Classroom, Section, Month and Year.
8. Click Submit to load data.
9. A table will show details such as Student Name, Class, Total Payee, Uploaded Receipt, Action Button to mark.
10. Click on mark as paid button to mark the payment receipt as paid.

Notes:

1. Once marked paid, records move from this tab to the Paid section of Fee Record.
2. No payments should be approved without verifying the uploaded receipts.

Tags:

payment receipts, fee payment approval, mark as paid, verify student payment, update payment status

### Fee Corrections:

#### Overview:

The **Fee Corrections** module enables finance/admin staff to view incorrect or outdated fees, apply **single** or **bulk** corrections to any listed fee components, track, approve, or reject correction requests.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on Student Accounts.
5. Click on fee corrections card.
6. You will be directed to the student fee correction page.

Notes:

Each tab in it has different functionality.

Tags:

Navigate fee corrections, student fee correction, fee correction navigations, fee corrections page.

#### Single Fee Correction:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on Student Accounts.
5. Click on fee corrections card.
6. You will be directed to the student fee correction page.
7. Under Single Fee Corrections Tab select Branch, Month, Classroom and Section.
8. Click **Submit** to list all students.
9. All the details will be shown in form of table such as Student name, Classroom, Section, Due Date, Total Fee and More Details.
10. Click on More Details to view additional Details.
11. Click on Make Correction to open correction form.
12. Form with prefilled details about the student selected will open.
13. Make necessary changes to it, give reason and click submit.
14. Correction will be applied and will sent to View Corrections tab to view and approve.

Notes:

1. Mandatory fields must be filled before submission (e.g., Outstanding, Due Date, Reason).
2. Only one student’s data can be edited at a time.

Tags:

single fee correction, edit single student fee, manual fee update, update individual fee, correct student dues

#### Bulk Fee Correction:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on Student Accounts.
5. Click on fee corrections card.
6. You will be directed to the student fee correction page.
7. Under Bulk Fee Correction tab select Branch, Month, Year, Classroom and Section.
8. Click Submit to load student data.
9. Select multiple students using checkboxes.
10. Click the green **Make Corrections** button.
11. Fill in the new amounts for all fee fields you want to correct.
12. Set the **Due Date**, mark overdue fine (or not) and provide a **Reason**.
13. Click **Submit** to apply the bulk correction.

Notes:

1. Enables correction for multiple students simultaneously under the same class-section.
2. All selected students will receive the same correction values.

Tags:

bulk fee correction, mass fee update, multi-student correction, adjust fees for class, batch fee entry update

#### View Corrections:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on Student Accounts.
5. Click on fee corrections card.
6. You will be directed to the student fee correction page.
7. This page will lists all fee corrections that are pending, approved, or rejected.
8. Under View Corrections tab select Branch, Classroom and Section to apply filter (optional).
9. All the correction requests will be shown under pending tab with details such as Student Name, Branch, Classroom, Section, Month and Year.

Notes:

1. Lists all fee corrections that are pending, approved, or rejected.
2. Used for administrative audit and validation before updating records.

Tags:

view fee corrections, see fee corrections, review fee correction, review fee update, pending fee changes, audit student fees.

#### Approve/Reject Fee Correction:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, go to Accounts card.
3. You will see different accounts modules here.
4. Click on Student Accounts.
5. Click on fee corrections card.
6. You will be directed to the student fee correction page.
7. This page will lists all fee corrections that are pending, approved, or rejected.
8. Under View Corrections tab select Branch,Classroom and Section to apply filter (optional).
9. All the correction requests will be shown under pending tab with details such as Student Name, Branch, Classroom, Section, Month and Year.
10. Click on the actions icon under actions column of along the row of the table whose request you want to approve or reject.
11. A modal will open with previous details before correction and after corrections as well.
12. Click on approve or reject and give remarks to approve or reject it.

Notes:

Approved or rejected bills will appear in their respective tab.

Tags:

Approve fee corrections, reject fee correction, review fee update, pending fee changes, audit student fees.

## Inventory Management:

### Overview:

The **Inventory Management** module in SLMS360 allows users to effectively manage product stock, stock levels, and order flow. It supports the organization of items into categories, the addition of detailed product entries, and the ability to track and update order statuses. This module helps streamline school or campus inventory operations, ensuring real-time visibility and accurate record-keeping.

### Navigation:

Steps:

1. Log in to your **SLMS360** client account.
2. On the Dashboard, click the **Inventory** **Management** card.
3. You will be redirected to the Inventory main panel featuring Categories, Products and Orders.

Notes:

1. Module access may vary based on your permissions.
2. Each section opens a separate management view for its respective area.

### Inventory Management Layout

Overview:

The **Inventory Management** module’s layout has cards related to management of inventory items specifically Categories of Inventory, products currently in the inventory, orders received.

Layout:

1. **Categories** module has functionality to organize inventory by managing product categories for smooth stock tracking and classification.
2. **Products** module has functionality to manage individual inventory items including stock details, pricing, and product-specific settings.
3. **Orders** module has functionality to track, update, and manage the status of all orders

Notes:

1. Filtering, search options may be available in each section.

Tags:

Inventory layout, Inventory management layout, stock tracking, product setup, order management, inventory flow, SLMS360.

### Categories:

#### Overview:

The **Categories** module allows users to organize inventory items by grouping them into logical categories. This enhances stock tracking and reporting and makes product management more efficient across modules.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, click on the Inventory Management Card.
3. You will be directed to a page with different inventory cards.
4. Click on the Category Card.
5. You will be redirected to the **Categories** screen, where you can add, update, view, or change the status of inventory categories.

Notes:

1. Access to this section may be restricted based on user permission.
2. All category actions are accessible from a centralized table view.

Tags:

category navigation, inventory access, managing categories, stock grouping, inventory setup.

#### Add Category:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on Categories Card.
3. Click on the top right button saying Add Category
4. A new modal will open where you will enter details such as category name.
5. Click on submit and the new category will be added and shown in the categories table

Notes:

1. Categories help in grouping products for filtering and bulk actions.

Tags:

add category, create category, inventory group, category setup.

#### View Category:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on Categories Card.
3. All the active and inactive categories will be shown in tabular form with their name.
4. You can search for any category from the table’s search field.

Notes:

1. You can sort categories by name .
2. Pagination is available

Tags:

View categories, inventory groups, list categories, browse inventory setup.

#### Update Category:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on Categories Card.
3. Click on the name of the category along the row of the table whom you want to update.
4. A modal will open
5. There will be prefilled fields from the row data which you can edit.
6. Enter new category name to replace the existing one
7. Click on the submit and the new category will be updated and shown in the categories table

Notes:

1. Renaming a category will reflect across all linked products.
2. Only users with edit permissions can make changes.

Tags:

edit category, update group, category settings, change category name.

#### Change Category Status:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on categories card.
3. Click the status toggle in the category table along the row of the table whose status you want to change.
4. The status will be changed and reflected in the table accordingly.

Notes:

Useful for phasing out outdated product groups.

Tags:

Category status, activate category, deactivate category, disable group.

### Products:

#### Overview:

The **Products** module allow users to manage individual inventory items including stock details, pricing, and product-specific settings.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, click on the Inventory Management Card.
3. You will be directed to a page with different inventory cards.
4. Click on the Products Card.
5. You will be redirected to the **Products** screen, where you can add, update, view, or change the status of inventory products.

Notes:

1. Access to this section may be restricted based on user permission.
2. All product actions are managed through a central table layout.

Tags:

Product navigation, inventory items, managing stock, product section, inventory access.

#### Add Product:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on **Products** Card.
3. Click on the top right button saying Add Product.
4. A new modal will open where you will enter details such as product name, category, branch, classroom, SKU, Price, Discount%, quantity, minimum quantity alert, product image and description.
5. Click on the submit and the new product will be added and shown in the products table.

Notes:

1. Each product must be linked to a category.
2. Some products fields are optional, others are mandatory.

Tags:

Add product, create item, new inventory, stock entry, product setup.

#### View Products:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on **Products** Card.
3. All the active and inactive products will be shown in tabular form with product name, category, branch, classroom, SKU, Price, Discount%, quantity, minimum quantity alert, product image and description.
4. You can click on the icons of product image or description to view them on a new page and modal respectively.
5. You can search for any product from the table’s search field.

Notes:

1. You can sort categories by names.
2. Pagination is available

Tags:

View categories, inventory groups, list categories, browse inventory setup.

#### Update Product:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on **Products** Card.
3. Click on the name of the product along the row of the table whom you want to update.
4. A modal will open.
5. There will be prefilled fields from the row data which you can edit.
6. Edit the fields you want and click on submit button.
7. Click on the submit and the new product details will be updated and shown in the product table.

Notes:

1. Changes are reflected in real-time.
2. Only users with update permissions can modify product data.

Tags:

Edit product, update inventory, change item, modify product details.

#### Change Product Status:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on Products card.
3. Click the status toggle in the products table along the row of the table whose status you want to change.
4. The status will be changed and reflected in the table accordingly.

Notes:

1. Use this feature to temporarily disable outdated items.

Tags:

Product status, activate item, deactivate product, inventory control.

### Orders:

#### Overview:

The **Orders module** in SLMS360 enables clients to track, update, and manage the status of all product orders. It provides a categorized interface with real-time data visibility for orders that are Pending, Dispatched, Delivered, or Cancelled, allowing users to efficiently monitor and act on their inventory-related transactions.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, click on the Inventory Management Card.
3. You will be directed to a page with different inventory cards.
4. Click on the Orders Card.
5. You will be redirected to the **Orders** screen, where you can view and change the status of pending, dispatched, delivered and cancelled orders.

Notes:

1. Access to this section may be restricted based on user permission.
2. Each order tab provides a filtered view of relevant records.

Tags:

Order navigation, inventory orders, order management, view orders, SLMS360.

#### View Orders:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on **Orders** Card.
3. All the orders will be shown in tabular form with order ID, City, Address, Phone, Payment Method, Delivery Method, Delivery Charges, Total Amount and status.
4. You can filter by status such as dispatched, pending, delivered and cancelled orders.
5. You can search for any order from the table’s search field and can also change status of orders.

Notes:

1. You can search orders by names.
2. Pagination is available

#### View Pending Order:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on **Orders** Card.
3. All new orders will be shown here in tabular form with pending status.
4. Details such as order ID, City, Address, Phone, Payment Method, Delivery Method, Delivery Charges, Total Amount will also be shown

Notes:

1. You can search Pending orders by names.
2. Pagination is available

#### View Dispatched Orders:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on **Orders** Card.
3. All new orders will be shown here in tabular form with pending status.
4. Click on the Dispatched filter from top to load all dispatched orders.
5. Details such as order ID, City, Address, Phone, Payment Method, Delivery Method, Delivery Charges, Total Amount will also be shown

Notes:

1. You can search dispatched orders by names.
2. Pagination is available

#### View Delivered Orders:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on **Orders** Card.
3. All new orders will be shown here in tabular form with pending status.
4. Click on the Delivered filter from top to load all Delivered orders.
5. Details such as order ID, City, Address, Phone, Payment Method, Delivery Method, Delivery Charges, Total Amount will also be shown.

Notes:

1. You can search for delivered orders by names.
2. Pagination is available

#### View Cancelled Orders:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on **Orders** Card.
3. All new orders will be shown here in tabular form with pending status.
4. Click on the Cancelled filter from top to load all Delivered orders.
5. Details such as order ID, City, Address, Phone, Payment Method, Delivery Method, Delivery Charges, Total Amount will also be shown.

Notes:

1. You can search for cancelled orders by name.
2. Pagination is available

#### Change Order Status:

Steps:

1. Once Logged In click on Inventory management card.
2. Click on **Orders** Card.
3. All new orders will be shown here in tabular form with pending status.
4. Click on the filter from the top and select either pending, dispatched, delivered or cancelled
5. Once the data is loaded in the table click on the order ID along the row of the table whose status you want to change
6. A modal will open which will allow you to select the status of that order.
7. Select the status and click submit
8. The status will be updated, and the row be shown in the respective category table.

Notes:

1. Status change will move the row to the updated status table.

Tags:

Orders, view orders, order table, filter orders, search orders, order ID, pending orders, dispatched orders, delivered orders, cancelled orders, change order status, update status, inventory orders, SLMS360 orders, order status management, order tracking, order filters, inventory dashboard.

## Marketing:

### Overview:

The **Marketing** module in SLMS360 helps organizations manage communication and feedback-related workflows. It provides tools to handle **student/staff complaints** and send **targeted email campaigns** to parents, staff, and stakeholders. This module strengthens engagement and fosters a responsive, well-managed school environment.

### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, click the Marketing card.
3. You will be redirected to the Marketing panel, which includes Complaints and Email Marketing features.

Notes:

1. Access to this module may be permission based.
2. Each section opens a dedicated page for managing its respective functions.

Tags:

Marketing navigation, school communication, complaints access, email marketing, SLMS360 modules.

### Marketing Module Layout:

### Overview:

The **Marketing** module’s layout has cards related to management of complaints and email marketing each perform different functions.

### Layout:

1. **Complaints** module has functionality to manage complaints raised by students, parents, or staff.
2. **Email Marketing** module has functionality to Create and send email campaigns to target audience/users/parents.

Notes:

* Complaints can be filtered by search.
* Emails have bulk-sending functionality.

Tags:

Marketing layout, complaints, email campaigns, communication, SLMS360, feedback management.

### Complaints:

#### Overview:

The **Complaints** feature in SLMS360 allows institutions to manage and resolve student, parent, or staff complaints efficiently. It provides a centralized platform for logging, reviewing, updating, and responding to complaints to ensure timely and appropriate resolution.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, click the Marketing card.
3. Click on Complaints Card to open Complaints module.
4. Here you can view, change status, reply and filter complaints which are shown in tabular form.

Notes:

1. Access to this section may be restricted based on user permission.

Tags:

Complaints, marketing complaints, complaint management, view complaints, change status complaints, SLMS360.

#### View Complaints:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard click on the Marketing card.
3. Click on the Complaints card.
4. A table will display all complaints with details such as the Title and Status Details icon which reveal in depth details.
5. User will click on the exclamatory icon in the Details column of the complaint along the row of the table whose details he wants to view.
6. Use filters or the search field to locate specific complaints.

Notes:

1. In depth details can be shown through an exclamatory icon.

Tags:

View complaints, complaint log, review issues, complaint history, SLMS360 complaints.

#### Change Status of Complaints:

Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard click on the Marketing card.
3. Click on the Complaints card.
4. From the Complaints table, locate the complaint whose status you want to change.
5. Click on the toggle button along the row of the complaint table whose status you want to change.
6. Status will be changed accordingly.

Notes:

1. Changing a complaint’s status helps track its progress and resolution.

Tags:

Complaint status, update issue, mark resolved, status change, complaint progress.

#### Complaint Reply: Steps:

1. Log in to your SLMS360 client account.
2. On the Dashboard click on the Marketing card.
3. Click on the Complaints card.
4. From the Complaints table, locate the complaint to whom you want to reply.
5. Click on the exclamatory icon in that row under the details column.
6. A modal will open with title, description and remarks history of previous chat messages with the user.
7. Enter the reply in the box given and click submit
8. The reply will be sent and shown in the history area.

Notes:

1. Replies are visible in the complaint’s timeline.

Tags:

Reply to complaint, comment, respond to issue, complaint follow-up, message resolution.

### Email Marketing:

#### Overview:

The **Email Marketing** feature in SLMS360 enables schools and administrators to communicate efficiently with parents, staff, and other stakeholders. Users can filter recipients, compose targeted messages, and send bulk emails for announcements, alerts, or updates all from within the system.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the **Dashboard**, click the **Marketing** card.
3. On the Marketing page, click the **Email Marketing** card.
4. You will be redirected to the email composition interface.

Notes:

1. Role-based permissions may restrict access to this module.

Tags:

email marketing access, send messages, school communication, marketing navigation, bulk emails.

#### Send Email:

Steps:

1. Once logged in Navigate to Marketing module.
2. Click on Email marketing.
3. Enter fields like Branch, Recipient Type, Status, Subject and Body.
4. Click on Submit.
5. A modal will open named filtered mail.
6. Select mails you want to include in your list from given options.
7. You can also deselect if selected wrong.
8. Click on send now and mails will be sent to all those that were selected.

Notes:

1. Only selected recipients will receive the email.
2. Use meaningful subject lines and formal body formatting for professional communication.
3. Emails may take a few minutes to reflect in users' inboxes depending on volume.
4. You can search for mails in the filter list.

Tags:

compose email, bulk messaging, parent communication, staff updates, email composer, SLMS360 marketing.

## Activity Logs:

### Overview:

The **Activity Logs** module in SLMS360 is designed to help clients track user activity and system updates in real time. It provides detailed logs of staff actions and salary-related updates for auditing, accountability, and compliance purposes.

### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the Dashboard, click on the Activity Logs card.
3. You will be redirected to a page with Log Cards.

Notes:

Access to logs may vary based on your permissions.

Tags:

activity logs, audit trail, user actions, system logs, change history

### Activity Logs Layout:

Overview:

To provide an overview of how the Activity Logs interface is structured and how clients interact with the Staff Logs and Salary Logs within SLMS360.

Layout:

1. The module displays two main log cards Staff Logs and Salary Logs.
2. **Staff Logs** help to track update logs for staff management.
3. **Salary Logs** helps to track update logs for salary management.

Notes:

1. Logs are read-only.
2. Access may depend on client permission

Tags:

activity logs, layout, staff logs, salary logs, SLMS360, audit interface

### Staff Logs:

#### Overview:

Staff logs help to guide users in accessing the Staff Logs section and filtering log entries by date range.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the **Dashboard**, click on the **Activity Logs** card.
3. Click on the **Staff Logs** card to open staff activity records.
4. All the available logs will be shown in tabular form.

#### View Staff Logs:

Steps:

1. Once logged in go to Activity Logs Card.
2. Click on Staff Logs.
3. A new page will open with all the staff logs with details such as Employee Id, Employee Name, Field Name, Old Value, New Value, Changed By, Changed At.
4. You can also search for logs by using search fields.
5. You can also filter through from and to date to get date specific staff logs.

Notes:

1. Use the date filter to narrow logs for audits or specific incident reviews.
2. You can combine date filters with the search bar to filter by staff name and action.

Tags:

staff logs, view logs, date filter, audit trail, filter logs, user activity, SLMS360.

### Salary Logs:

#### Overview:

Salary logs help to guide users in accessing the Salary Logs section and filtering log entries by date range.

#### Navigation:

Steps:

1. Log in to your SLMS360 client account.
2. From the **Dashboard**, click on the **Activity Logs** card.
3. Click on the **Salary Logs** card to open salary records.
4. All the available logs will be shown in tabular form.

#### View Salary Logs:

Steps:

1. Once logged in go to Activity Logs Card.
2. Click on Salary Logs card.
3. A new page will open with all the salary logs with details such as Employee Id, Employee Name, Field Name, Old Value, New Value, Changed By, Changed At.
4. You can also search for logs by using search fields.
5. You can also filter through from and to date to get date specific salary logs.

Notes:

1. Use the date filter to narrow logs for audits or specific incident reviews.
2. You can combine date filters with the search bar to filter by salary name and action.

Tags:

salary logs, view logs, date filter, audit trail, filter logs, salary activity, SLMS360.

## Help & Support:

### Overview:

The Help & Support module in SLMS360 provides clients with multiple channels to request technical assistance. Users can choose from **Support Tickets**, **Email Support**, or **Live Call** options to get help from the SLMS360 team based on urgency and preference.

### Navigation:

Steps:

1. Log in to your SLMS360 account using your credentials.
2. On the **Dashboard**, locate and click the **Help & Support** card
3. You will be redirected to the Help & Support panel displaying three options, such as Support Tickets, Email Support, Live Call.

Notes:

1. If the Help & Support tile is not visible, your user role may not have permission to access it.
2. Make sure you have a stable internet connection to interact with real-time support tools.

Tags:

help, support, contact, assistance, technical support

### Help & Support Layout:

Overview:

To explain the available support methods in SLMS360 and their intended use.

Support Options:

1. **Support Tickets** allow you to create and manage formal tickets for issues or feature requests.
2. **Email Support** allows you to submit inquiries via email. Suitable for detailed queries that require documentation or extended troubleshooting.
3. **Live Call** allows you to connect with a support agent in real time for immediate help and guidance. Best for urgent issues.

Notes:

1. Choose **Live Call** for urgent problems for direct contact.
2. Use **Support Tickets** for issues that may need tracking or coordination with multiple authorities.
3. **Email Support** is ideal for contact through email

Tags:

support options, ticket system, email help, live call, contact support, technical assistance, real-time help

### Support Tickets:

#### Overview:

Track and manage your support tickets effectively and ensure all issues are resolved promptly.

#### Navigation:

Steps:

1. Log in to your account using credentials.
2. From the **Dashboard**, click on the **Help & Support** tile.
3. In the Help & Support panel, click on **Support Tickets.**
4. You’ll be redirected to the Support Ticket dashboard showing created, open and closed tickets.

Notes:

1. You must have appropriate permissions to view or create tickets.
2. Older tickets can be searched for or filtered.

Tags:

support tickets, issue reporting, help desk, client support, SLMS360

#### Create Ticket:

Steps:

1. Inside the Support Tickets page, click on **Create Ticket** on the top right of the screen.
2. Fill in the required fields like **Ticket Category**, **Priority** of that ticket, **Subject, Description**

and relevant **attachment**

1. Click **Submit** to send the ticket.
2. Ticket will be created and shown on the ticket table.

Notes:

1. A ticket ID will be generated and assigned for tracking.

Tags:

create tickets, submit support requests, report issue, new ticket, contact support

#### View Ticket:

Steps:

1. Navigate to the Support Tickets page within the **Help & Support** module.
2. Here you can view the support tickets in tabular form with Id, Subject, Category, Priority, Date and Status.
3. Click on any ticket Subject to open its full details and chat history.

Notes:

1. You can filter or sort tickets too from the search field.

Tags:

View Ticket, ticket status, support ticket list, track issue, ticket table

#### Reply To Ticket:

Steps:

1. On the **Support Tickets** page, click on the **Subject** of ticket along the row of table you want to reply to.
2. Add reply in the description field.
3. (Optional) Attach files or screenshots relevant to your reply.
4. Click **Submit** to send the reply.

Notes:

1. Replies are added to the ticket’s thread and are visible to support staff.

Tags:

reply to ticket, respond to support, ticket communication, add comment, update issue

### Email Support:

#### Overview:

**Email Support** in SLMS360 provides users with a quick and direct way to contact the technical support team via email. This option is ideal for detailed queries, attaching screenshots, or following up on less urgent issues.

#### Accessing Email Support:

Steps:

1. Log in to your SLMS360 account.
2. From the Dashboard, click the Help & Support card.
3. Click on the Email Support card from the available support methods.
4. A pop-up window will appear showing the official support email address
5. Click the copy icon to copy the email address to your clipboard.
6. Open your email client and send your query to this address.

Notes:

1. Replies from support will be sent to your email address.

Tags:

email support, contact help, send email, support mail, SLMS360 assistance, support communication

### Live Calls:

#### Overview:

The **Live Call** feature allows SLMS360 clients to connect directly with the support team via phone. This method is ideal for urgent issues that require real-time guidance, such as login problems, module inaccessibility, or critical functionality failures.

#### Accessing Live Call Support:

Steps:

1. Log in to your SLMS360 account.
2. From the Dashboard, click the Help & Support card.
3. Click on the Live Call card from the available support methods.
4. A pop-up window will appear showing the official support number.
5. Click the copy icon to copy the phone number to your clipboard.
6. Open your email client and send your query to this address.

Notes:

1. This option is best for time-sensitive or critical issues.
2. Live call support may be available only during working hours.

Tags:

live call, phone support, urgent issues, technical help, call assistance, SLMS360 hotline