Coaching Institute Management Software (CIMS)

Version 5.4

User Guide

TECHIOR Bridging the gap

MERIT STUDENTS

Table of Contents

Introduction

Coaching Institute Management System simplifies managing the administrative process of Institutes and Training Academies.
The features include:

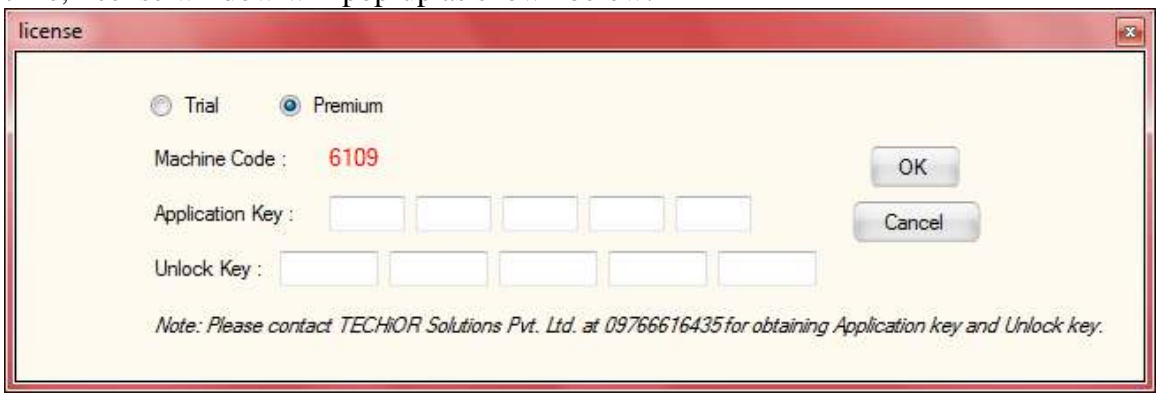
- ✓ Institute configuration
- ✓ User management
- ✓ Role management
- ✓ SMS and email configuration
- ✓ Data backup and restore facility
- ✓ Backup Reminder
- ✓ Data import from Excel
- ✓ Student enquiry (saving student details)
- ✓ Enquiry Follow-up
- ✓ Enquiry Allocation
- ✓ Student registrations
- ✓ I-cards
- ✓ Fee payments
- ✓ Automatic Installment calculations
- ✓ Discounts and refunds
- ✓ Payroll Setup
- ✓ Staff Salary Payment Setup
- ✓ Staff Salary Payments
- ✓ Batch Timetable
- ✓ Student Settle Fees
- ✓ Configuring courses offered
- ✓ Keeping trainer (instructor) records
- ✓ Batch formation
- ✓ Attendance
- ✓ Staff Attendance
- ✓ Keeping record of test marks
- ✓ Keeping track of expenses
- ✓ Keeping track of items issued to students
- ✓ Inventory management
- ✓ Lots of reports to view data as required:
    - Payments received
    - Outstanding payment

- Attendance report
- Batch performance report
- Student performance report

- Follow-up reports
- Expenses reports
- Issued items reports
- SMS log
- Inventory reports

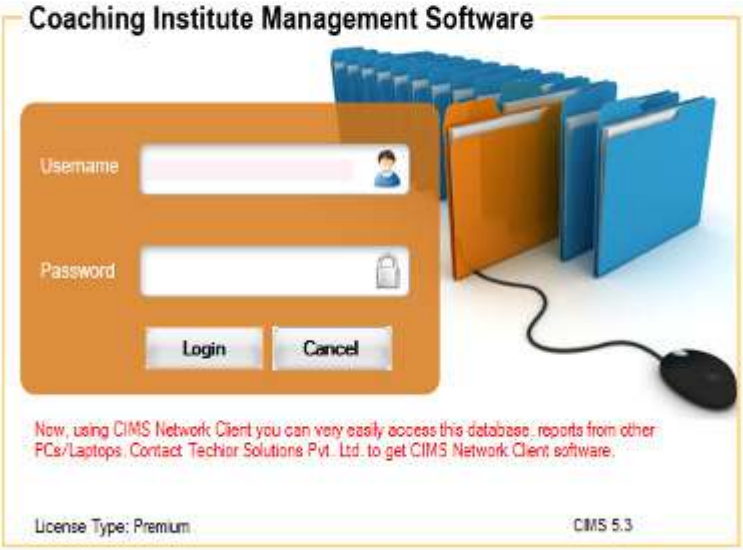
License Window

Once installation of CIMS 5.1 is completed, when the application is launched for the first time, license window will pop-up as shown below:



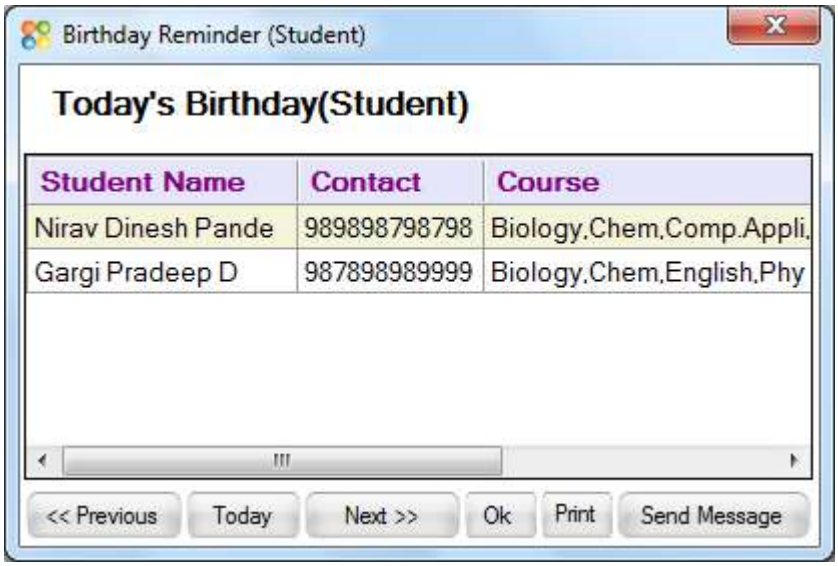
Call Techior Solutions along with the 4-digit Machine Code displayed above to obtain the Application Key and the Unlock Key.

Now choose "Premium", enter both the keys in the License window above and click on Ok to open the Login Window as shown below:



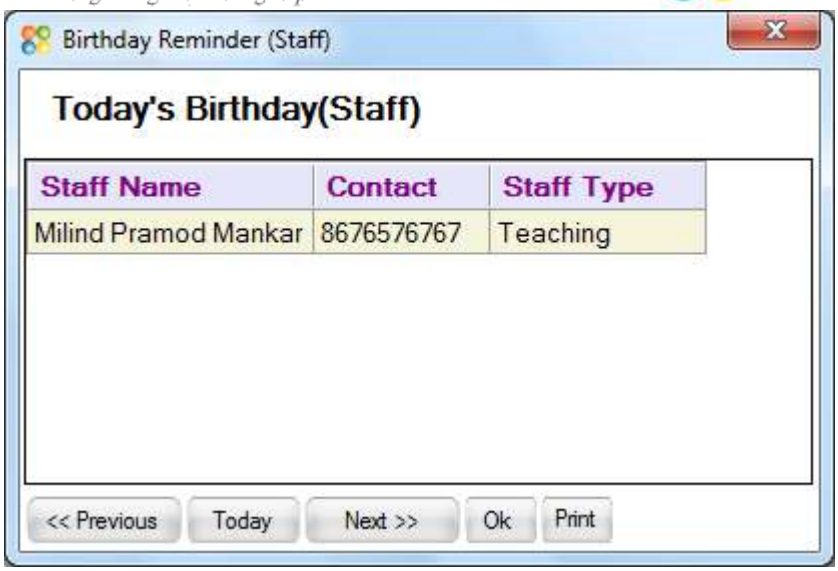
Enter username as admin and password as admin1 and click "Login" to open the Home Page or Search Student Page. If for the admin or any other User checkboxes for Enquiry Followup, Payment Due, Staff Birthday, Student Birthday & Back up reminder are ticked & as the Admin or Other User logged in get the respective reminders .
Different Pop up reminder are shown as below.

Student Birthday Reminder:



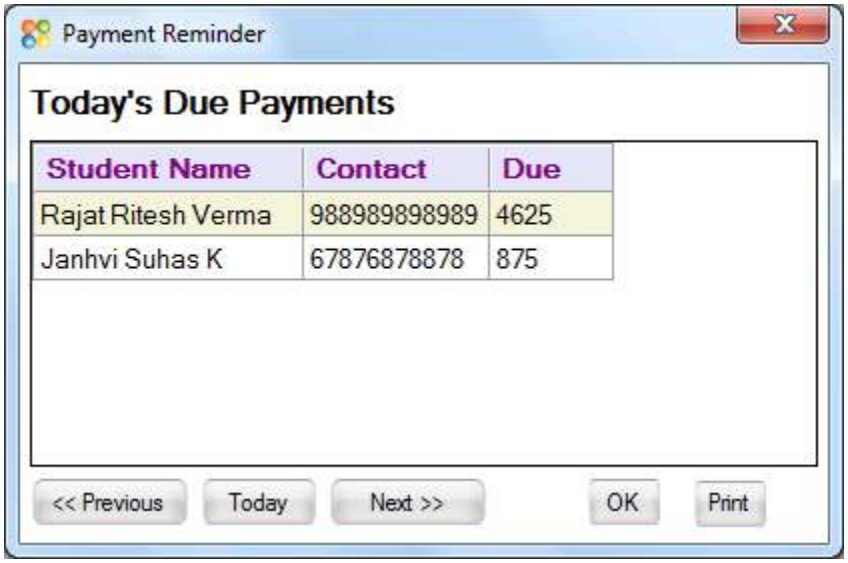
By clicking on Previous or Next user can find the previous or next upcoming birthday of the Students. When clicked on Send message in the pop up it will take the user to the follow up page from where the message can be send.

Staff Birthday Reminder:



By clicking on Previous or Next user can find the previous or next upcoming birthday of the Staff.

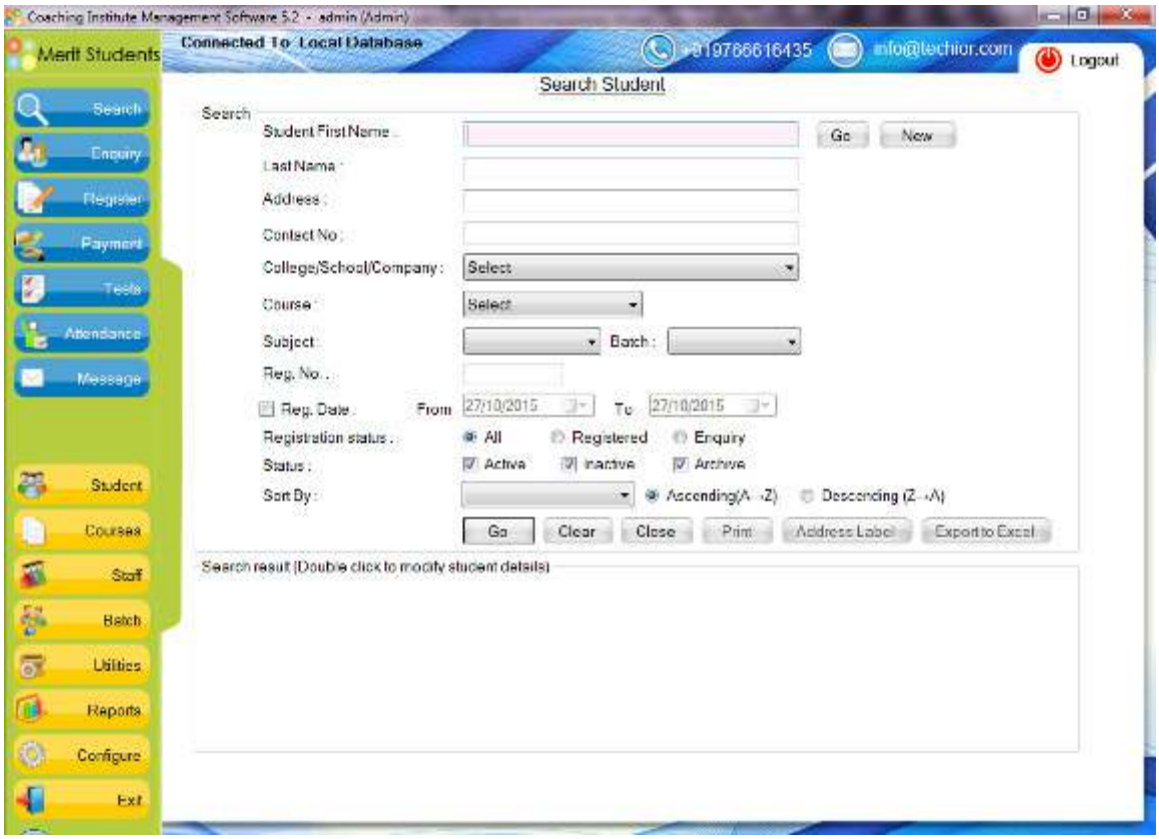
Payments Due Reminder:



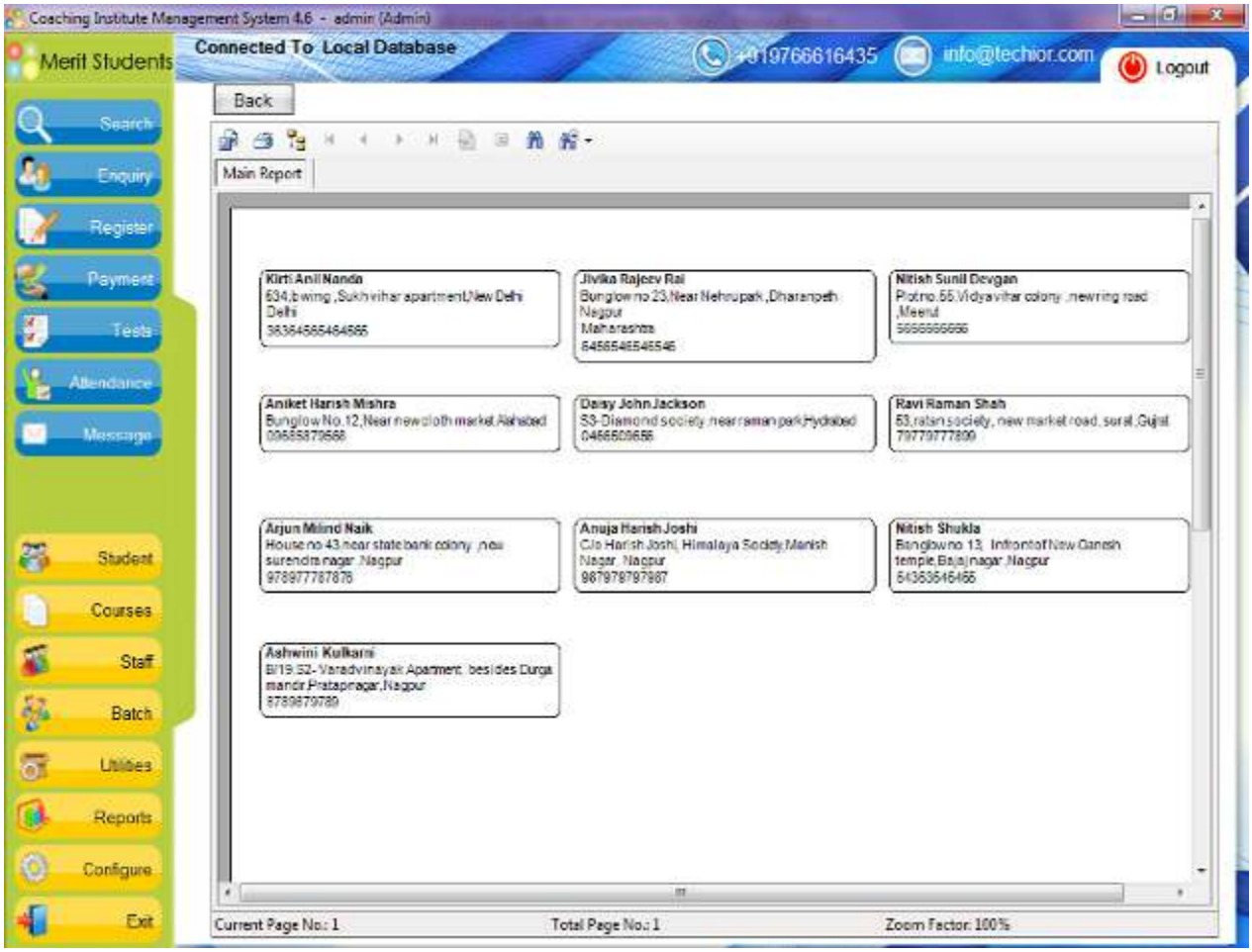
By clicking on Previous or Next user can find the previous or next due payment of the student.

Home (Search Student) Page

This is the Starting page or the main page of the CIMS application. You can access all the modules from here.

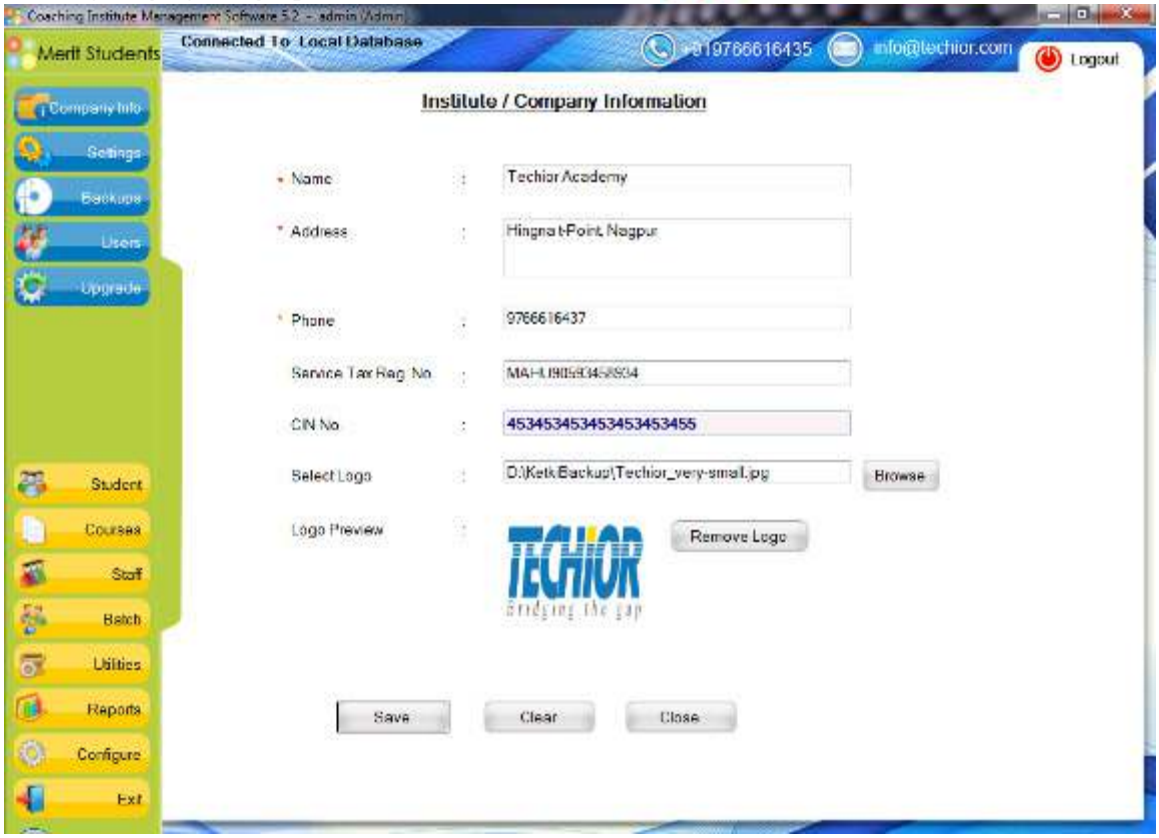


On the Search form label print button is there search the student & click on Label it prints the label for the address of the student. For multiple students multiple labels can also get printed.

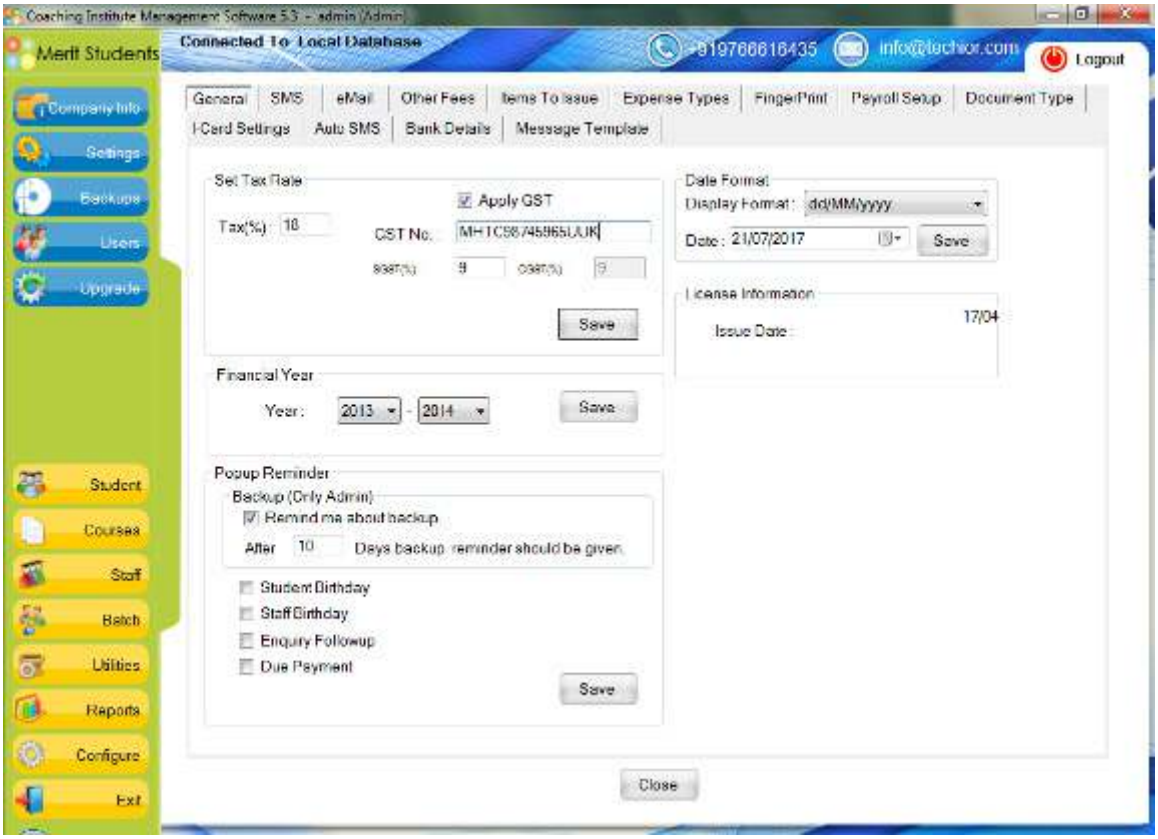


Configure Module (Can be accessed only by Admin user)

Company Information:
Path: Configure > Company Info
Here you can configure the institute details like name, address, contact number ,Service tax Number/GSTnumber , CIN No. and logo. This information is used as a header on the reports presented by the system.
You must login as an admin user in order to set and modify this information.


Coaching Institute Management Software 5.2 - admin (Admin)
Merit Students
Connected To: Local Database
+919766616435
info@techior.com
Logout
Company Info
Settings
Backups
Users
Upgrade
Student
Courses
Staff
Batch
Utilities
Reports
Configure
Exit
Institute / Company Information
* Name : Techior Academy
* Address : Hingna t-Point, Nagpur
* Phone : 9766616437
Service Tax Reg. No : MAHU1805E045894
CIN No : 45345345345345345345
Select Logo : D:\Ketk\Backup\Techior_very-small.jpg
Browse
Logo Preview :
Remove Logo
Save
Clear
Close

Settings:
Path: Configure > Settings



The following settings can be configured. You must login as an admin user in order to set and modify this information.

General:

General settings include the financial year for which the system is being used and the Tax/GST that is applicable for the payments. The Tax/GST rate configured here is used to calculate the total fees payment.

If the checkbox for Student Birthday, Staff Birthday, Enquiry followup, Due Payment are ticked, then the current user will be able to get the above mentioned reminder pop up when logged in.

NOTE: Please take the following precautions before deleting any course / subject:

- Take a backup of the database before deleting any course / subject.
- Take a printout of the course wise or subject wise payment report for the course/subject being deleted so that refunds can be provided to the students who have already paid for that course/subject.

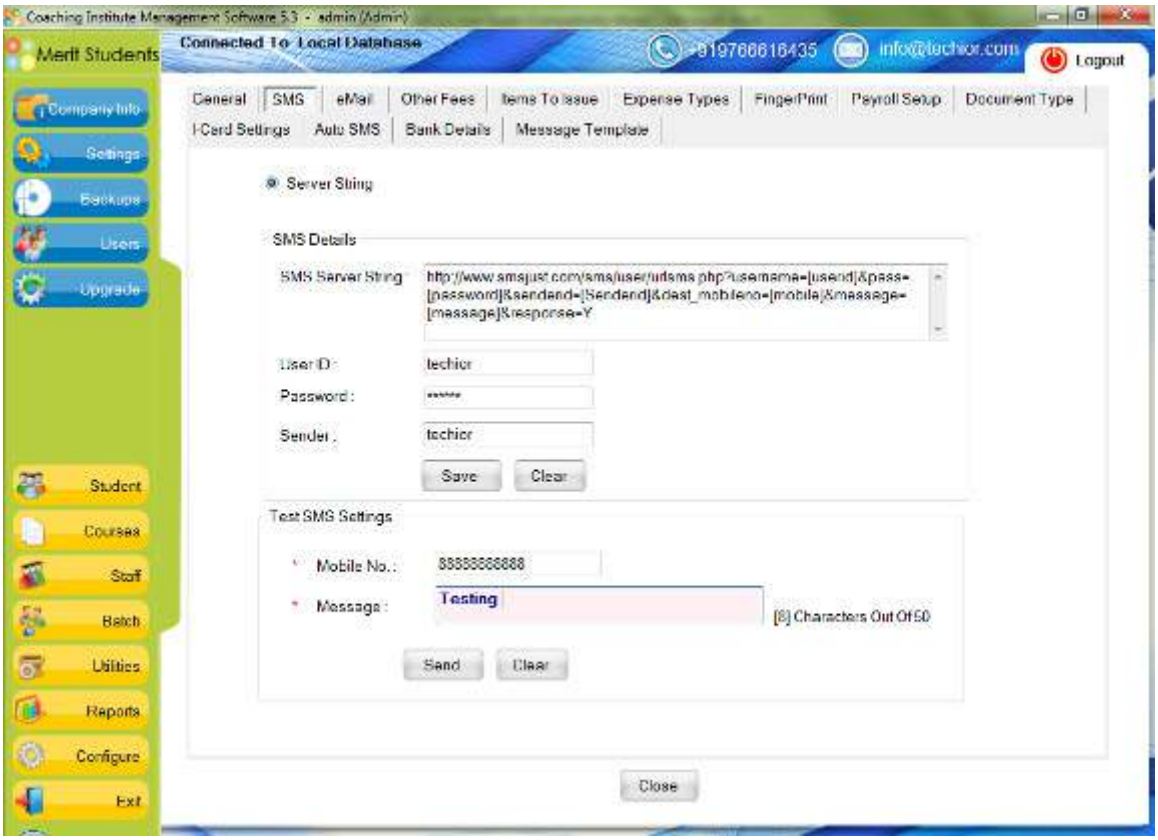
Backup Reminder: User can set the number of days after which a reminder should be given for taking backup. Tick the checkbox "**Remind me about backup**" and enter the number of days after which you want the system to give you a reminder. When the application is started, a popup appears reminding you to take backup of data – this prevents you from losing data in case of a system crash, disk failure or virus attack.

Date format Setting: Here the Admin user can define the Software date format, whatever the format is set by the admin, all the entries in the S/W will get entered in that format.

SMS Configuration:

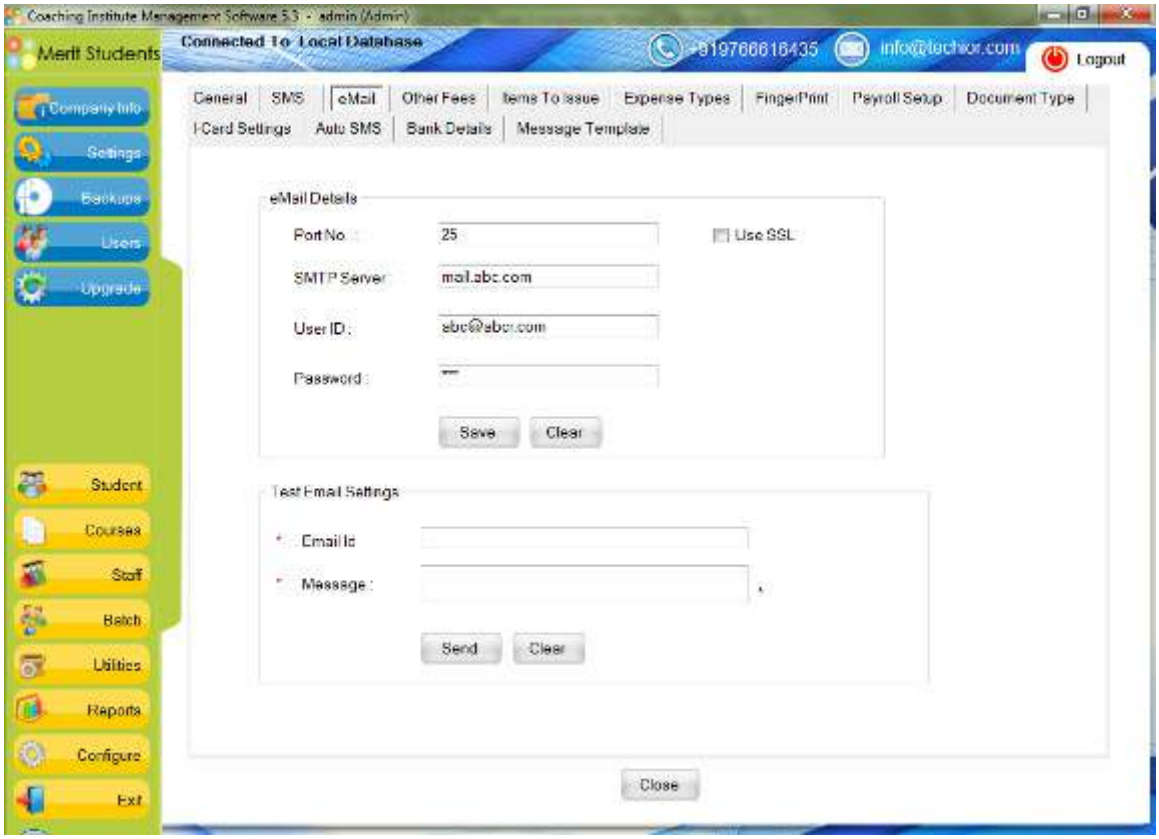
You can send SMS using any Bulk SMS Service.

"Server String" - Here you can configure the SMS server details along with user-id and password which will be used to send SMS about fees reminders, test marks, attendance and make announcements to a selected group of students.
Test SMS setting is provided to test SMS string settings.



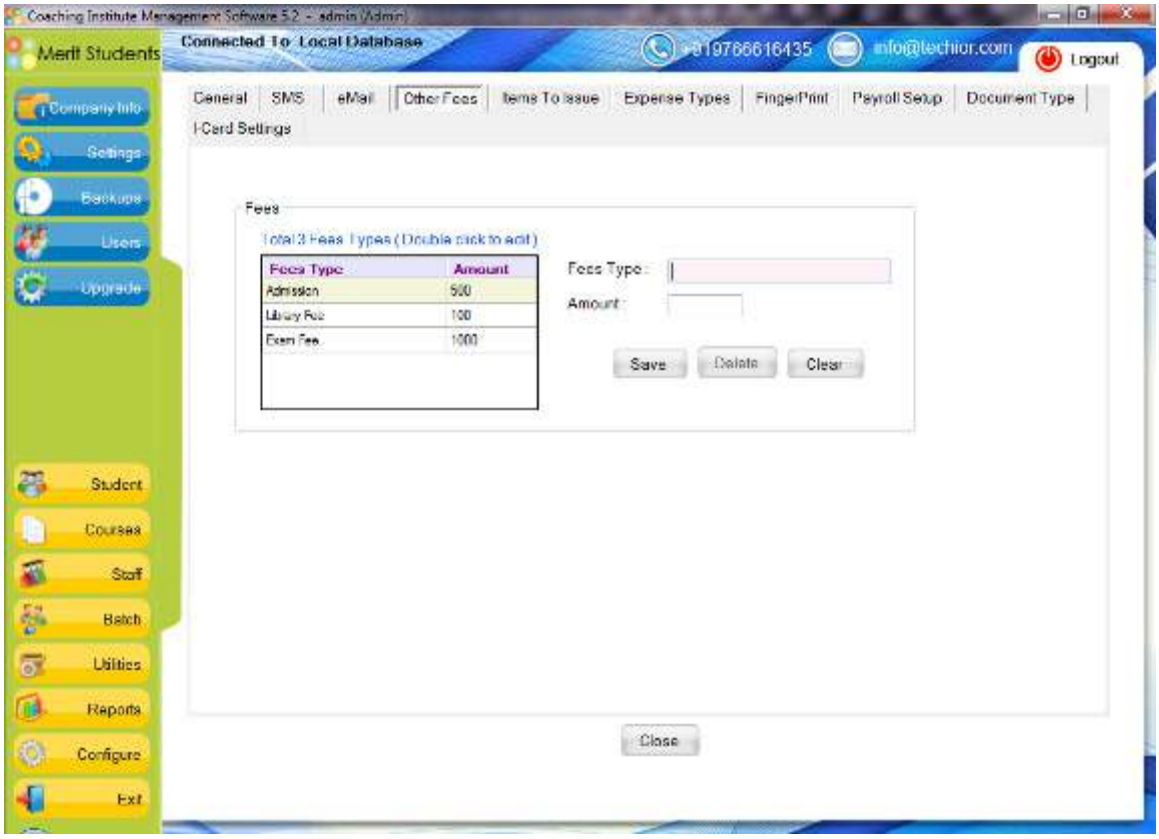
eMail Configuration:

Here you can configure the eMail server details along with userid and password which will be used to send eMails about fees reminders, test marks, attendance and make announcements to a selected group of students.



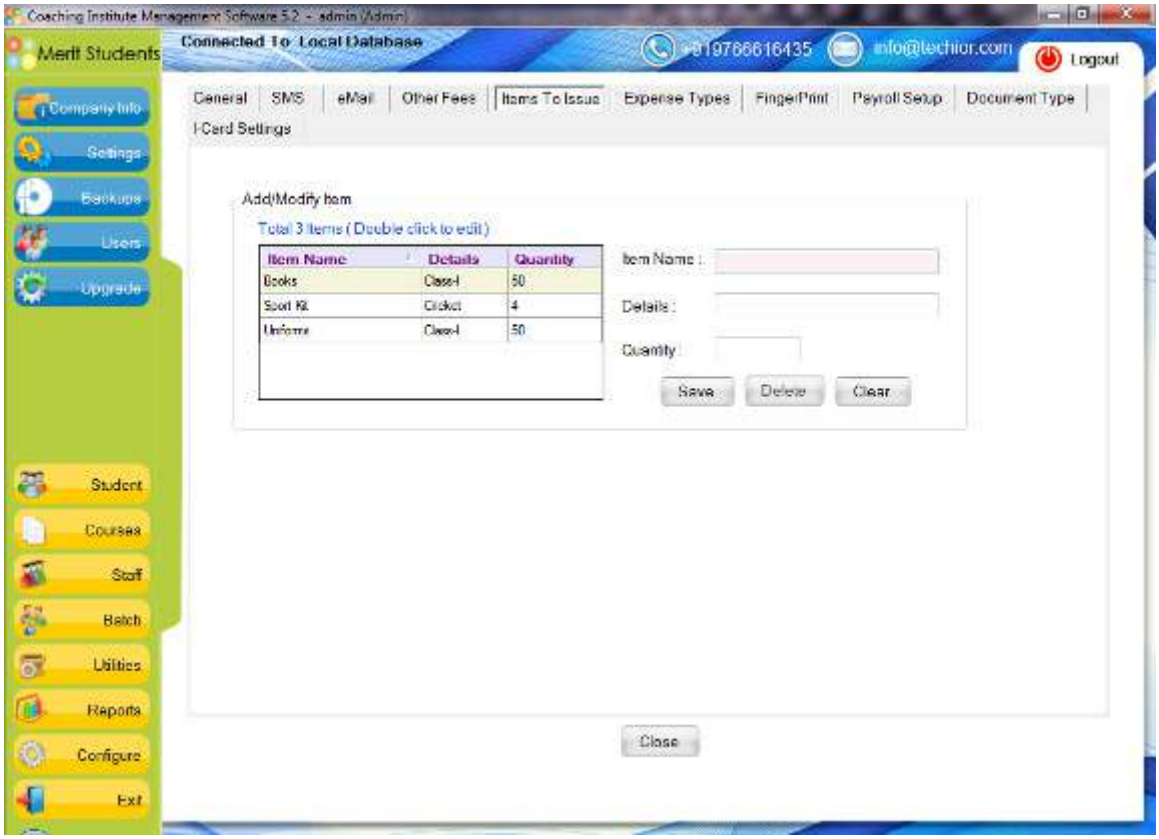
Other Fees:

Here you can configure any additional fees (over and above the course fees) that students need to pay. This may include admission fees, parking fees, examination fees, lab fees, etc.



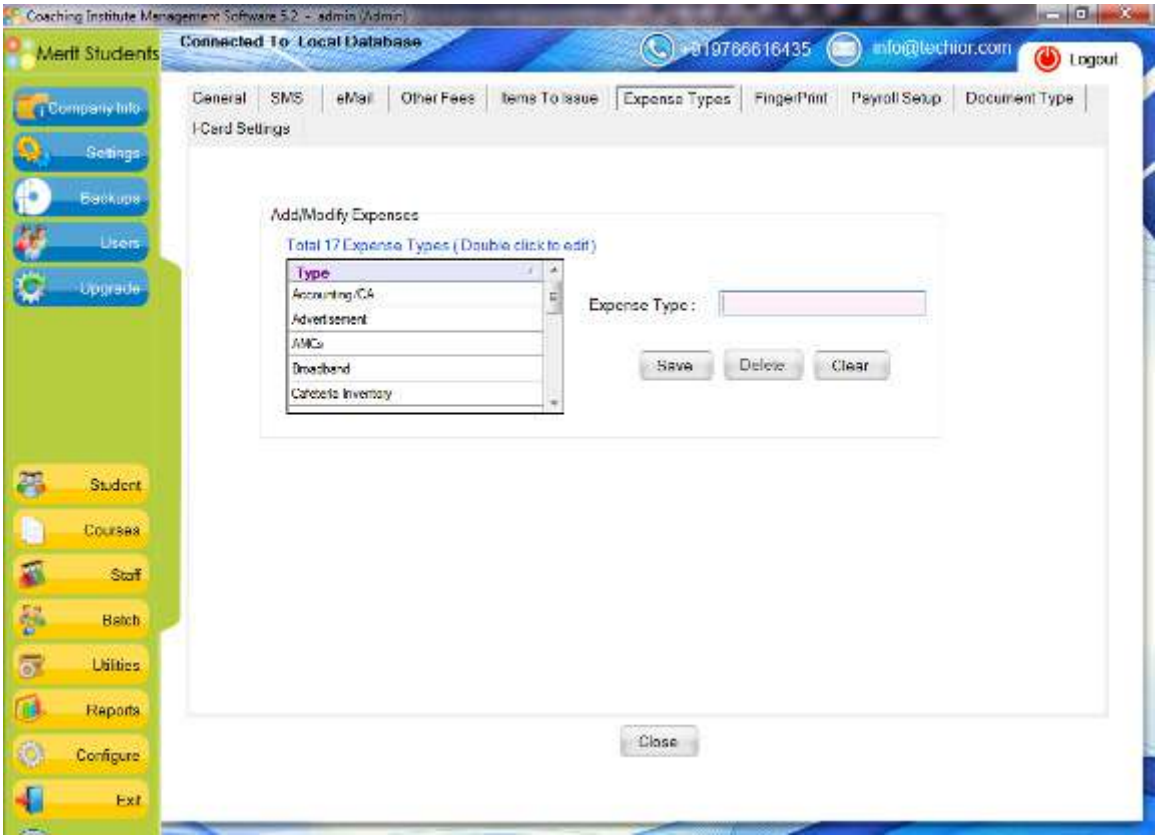
Items to Issue:

Here you can maintain the list of items that are available for issue to students. The list of Issue Items created here is then available in “Issue Items” tab in Utilities. You can keep track of the items that have been issued to registered students along with date of issue.



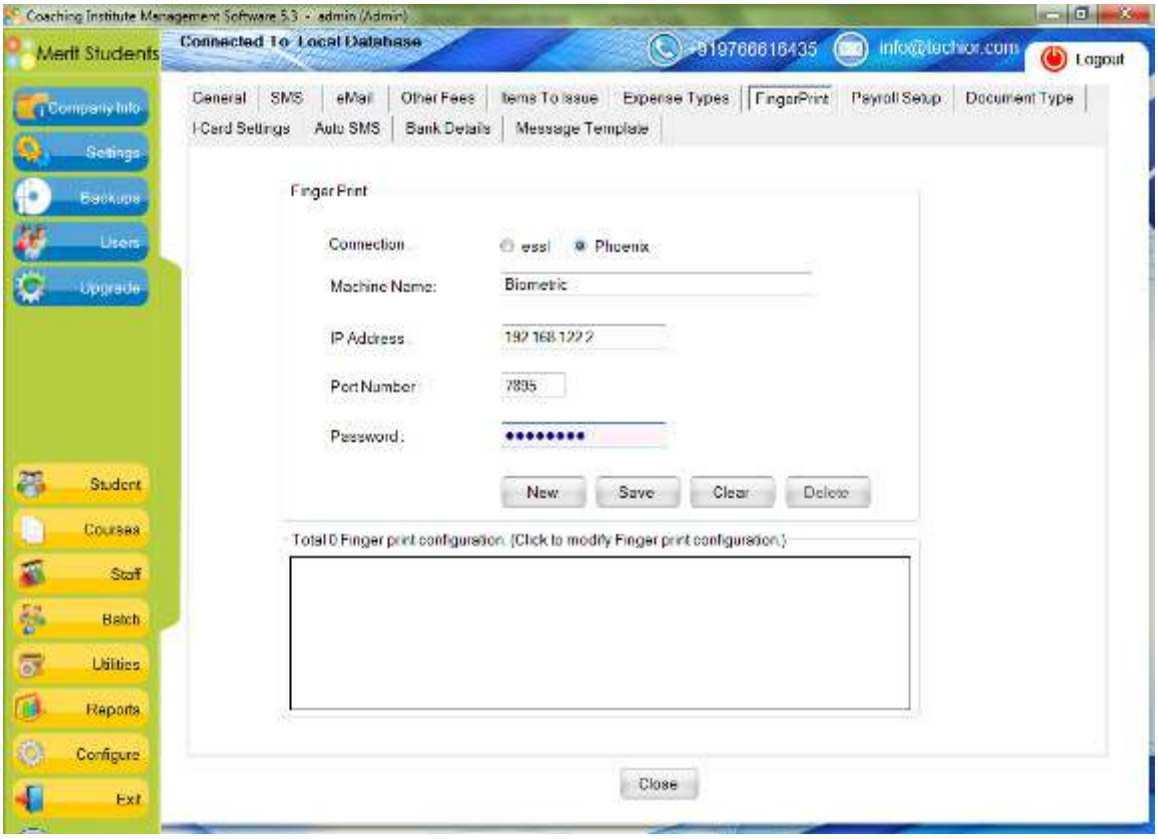
Expense Types:

Here you can maintain the list of the various categories of expenses. These expense types are then used to keep track of the expenses being incurred in the institute. The categories of payment are defined here, while the actual payments being made are tracked in Expenses tab in Under utilities.



Finger Print:

You can connect a finger print device to your LAN or to your PC using USB connection. The attendance of students in various batches can be taken using the finger print device. The IP address, port and password of the device are configured here. While taking attendance for a batch in Student -> Attendance form, Select the type of connection & machine, click on “From Device” button to import the attendance directly from the device.

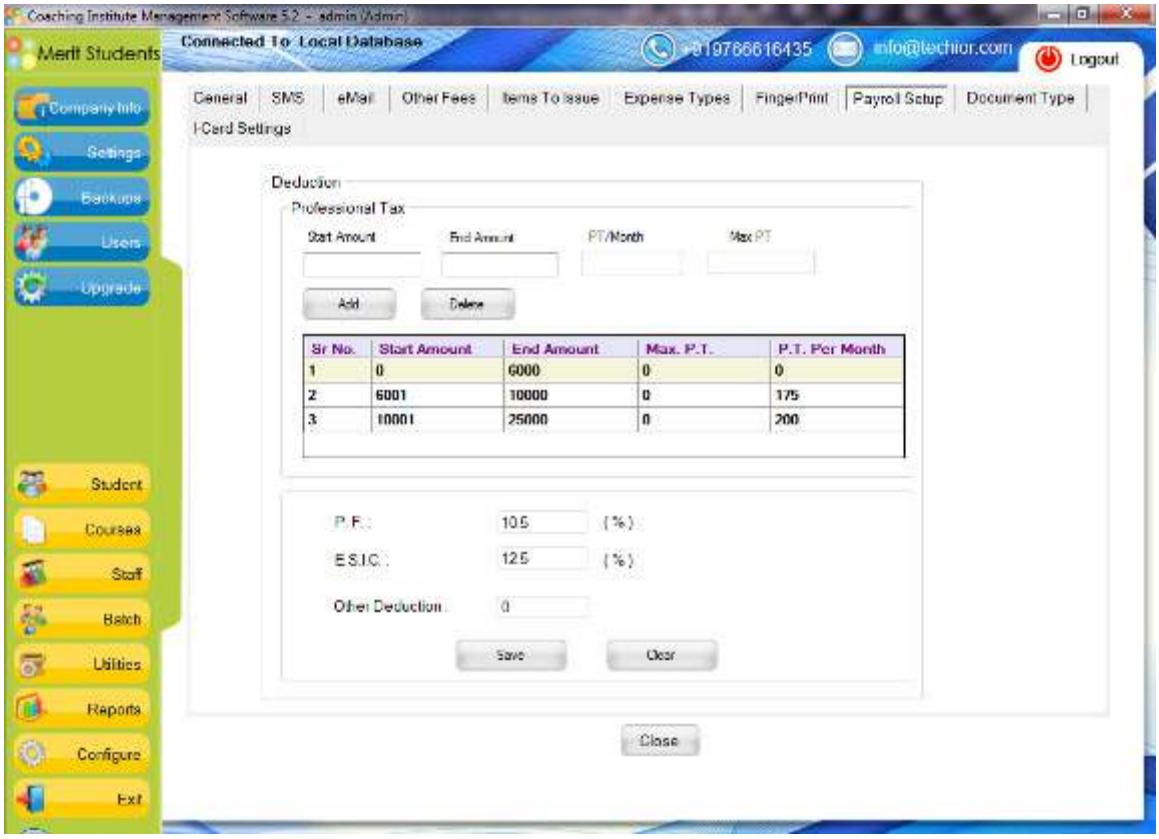


Payroll Setup

Click "**Configure**" > "**Settings**" > "**Payroll Setup**"

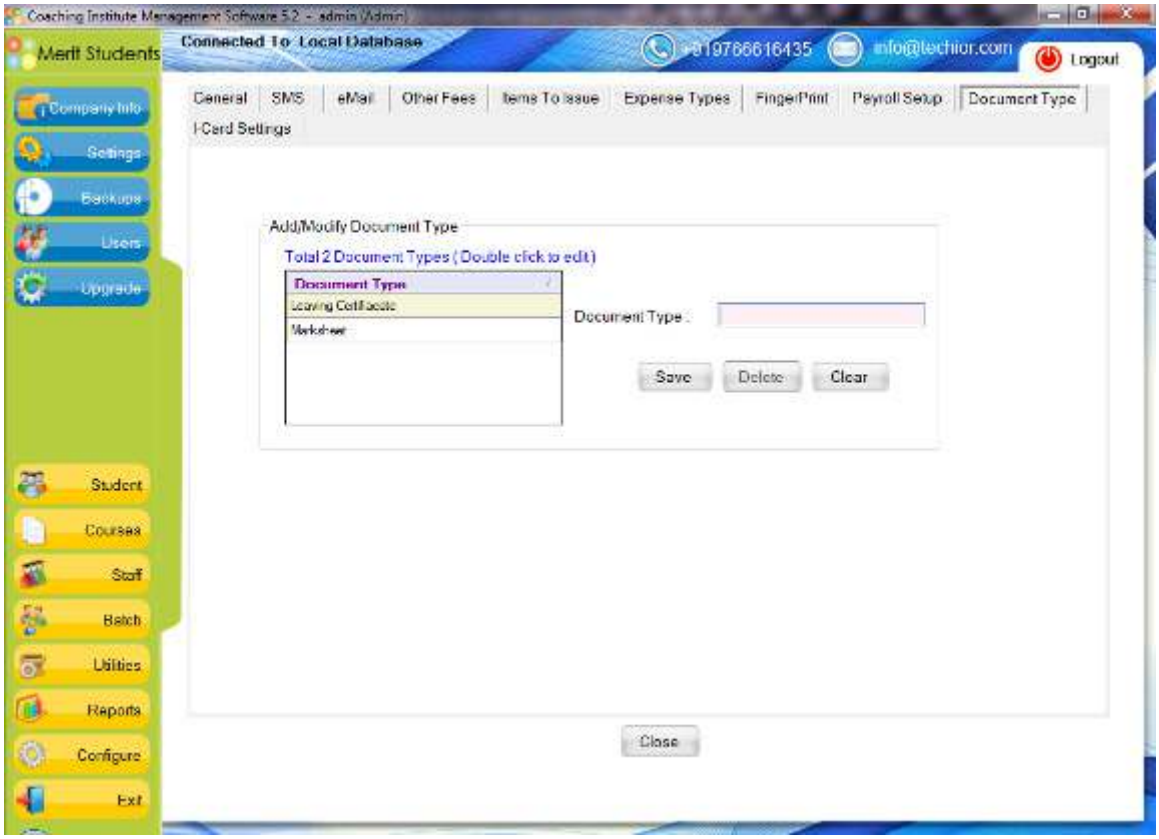
Here you can specify the slabs for Professional Tax as per different salary slabs. You can also specify P.F Rate, E.S.I.C Rate and any other deduction amount here. All the above will be taken into account when Staff Payment is made.

To add a Professional Tax slab, specify "Start Amount", "End Amount" and "PT/Month" and click on "Add".



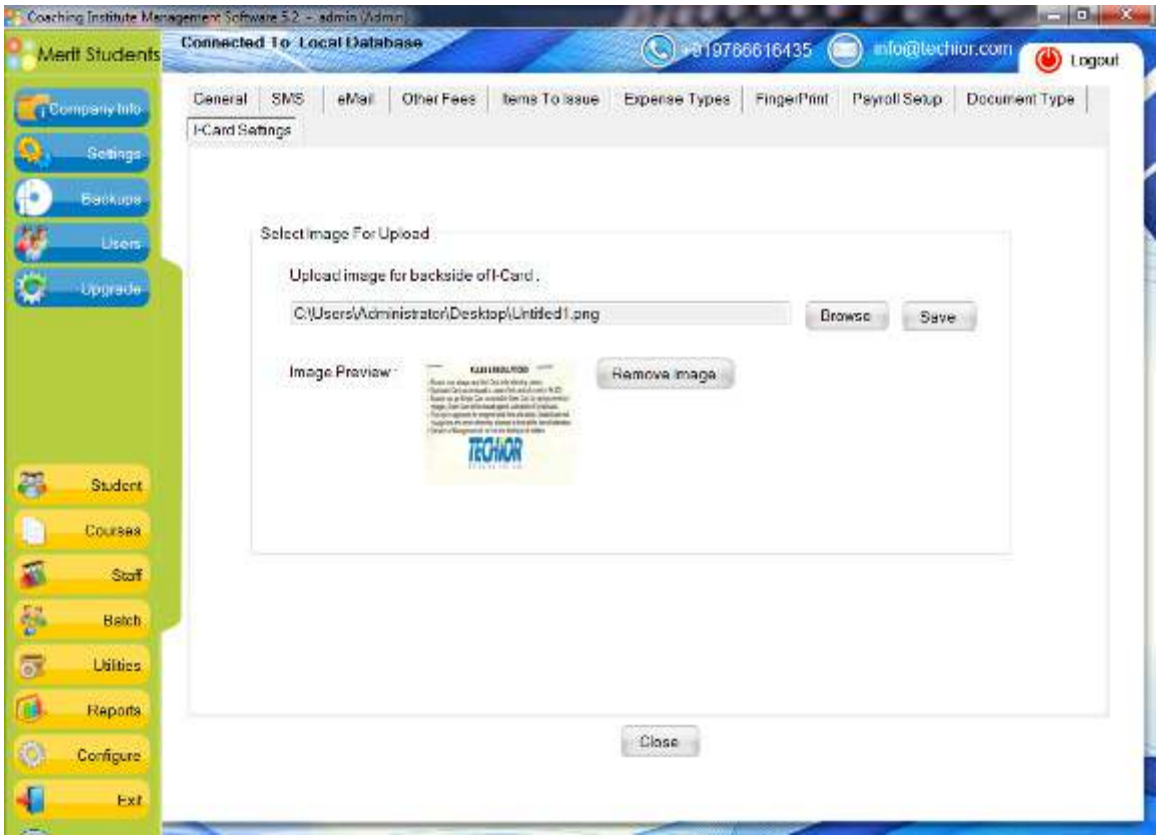
Document type:

Click "**Configure**" > "**Settings**" > "**Document Type**"
Here you can specify the different types of documents to be collected from the students. e.g Degree certificate, address proof, Marklist, etc.
To add document type, mention the document type & then click on save.



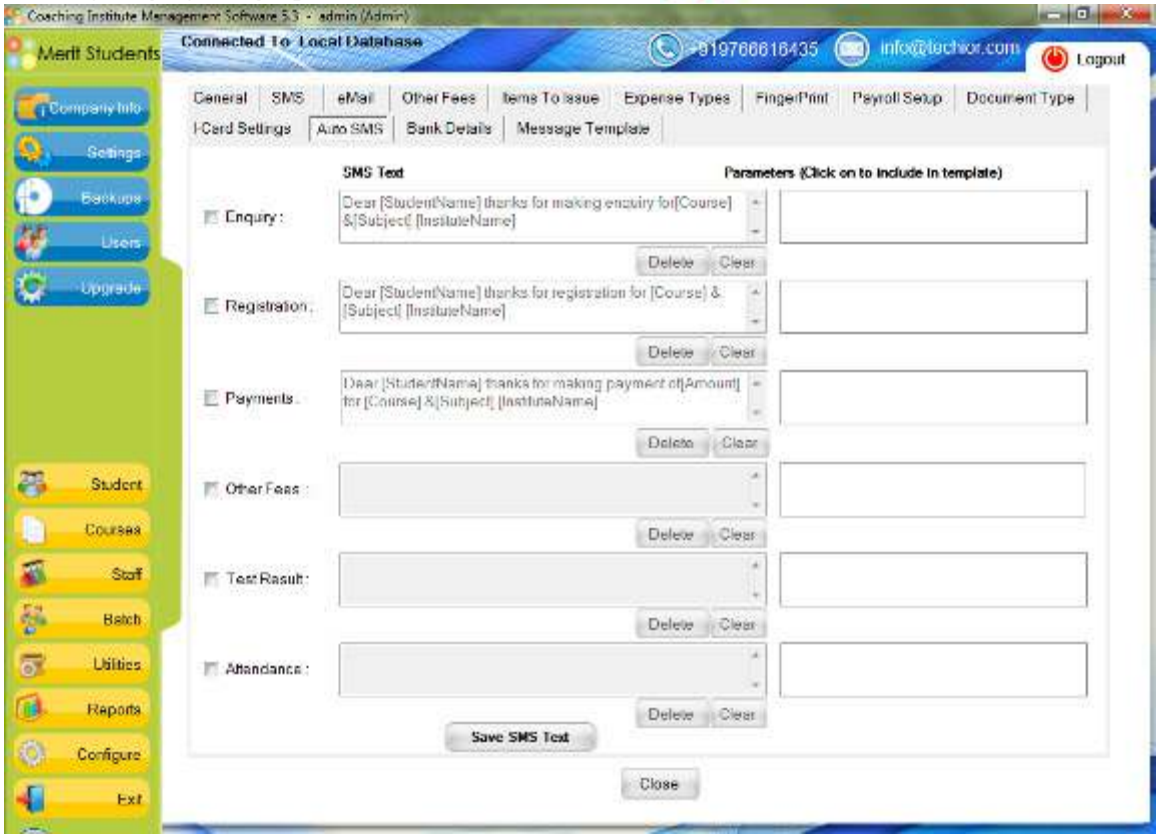
I-Card Setting :

If you want to print front & back side of the i- card, then you have to upload image of the back side here, which can be then reflected when Print back side option is selected while printing the I-card.



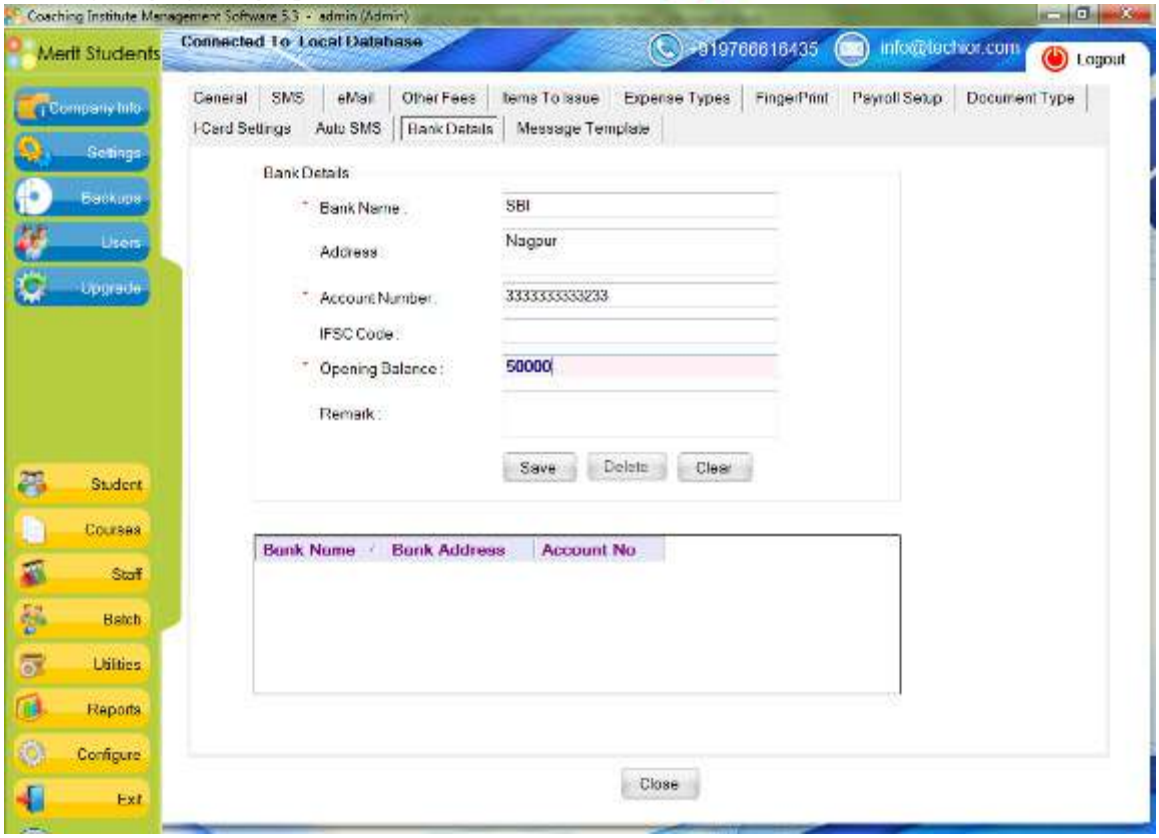
Auto SMS :

From here you can send auto SMS to students/parents for Enquiry, Registration, Payment, Other Fees Test result & Attendance. You can create a message using the parameters provided. If you have configured a message for Auto SMS, the SMS will be sent automatically.



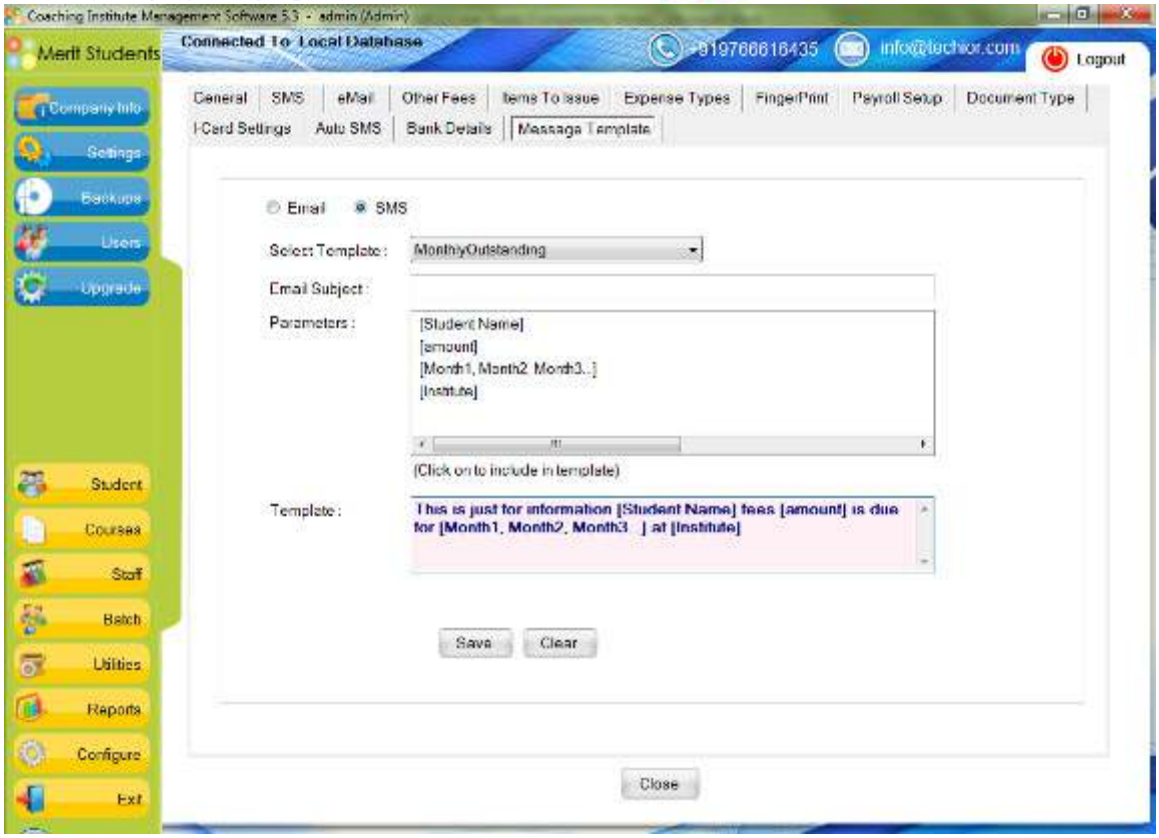
Bank Details:

Add bank details like bank name, account number & opening balance.



Message Template:

If user wants to change the default message used in software, you can change the message & this changes message will be sent to students from announcement, test result & attendance.

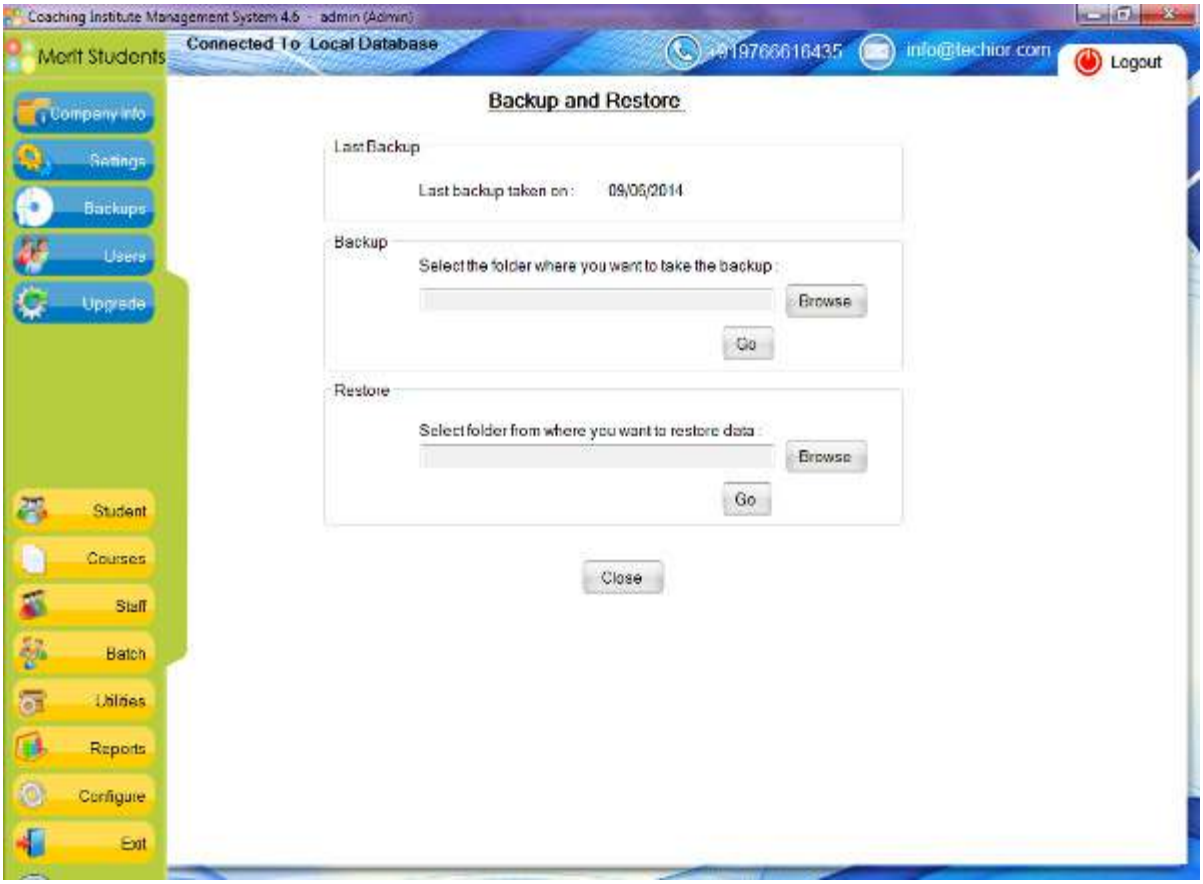


Backup & Restore

Path: Configure > Backups

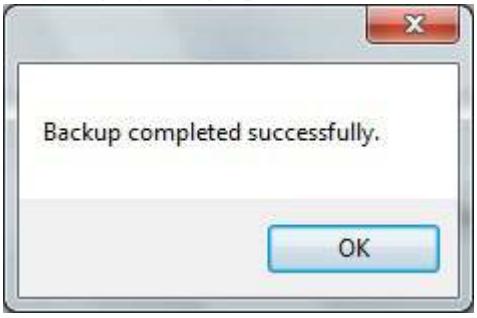
This tab is used to take backup of the database. Click on “Browse” to select the folder where you want to take the backup and then click on “Go” to take the backup. You must login as an admin user in order to take a backup.

Backup & Restore Window

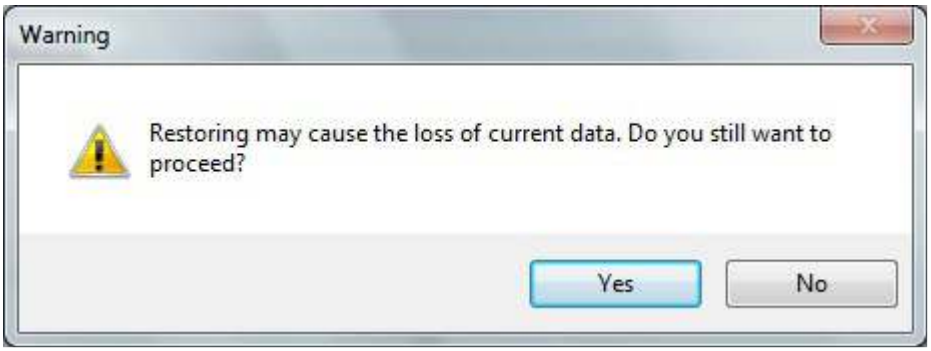


Note: It is recommended that you take backups of the database on a regular basis. You can setup CIMS to give you automatic reminder after a certain number of days (Configure – Settings – General tab). E.g. if you set number of days to 1, you will get a reminder daily. If you set number of days to 2, you will get a reminder on alternate days and so on.

If backup is done successfully, below pop-up message is displayed:



The **Restore** option is used to restore a previously backed up database. Click on “Browse” to select the location from where you want to restore the database and then click on “Go” to restore the data. You must login as an admin user in order to restore a previously saved backup.
You should be very sure when you are restoring a previously backed up database as this can cause loss of data in the application. Below pop-up will confirm the same:



Once restore is success, below pop-up message will confirm the same:

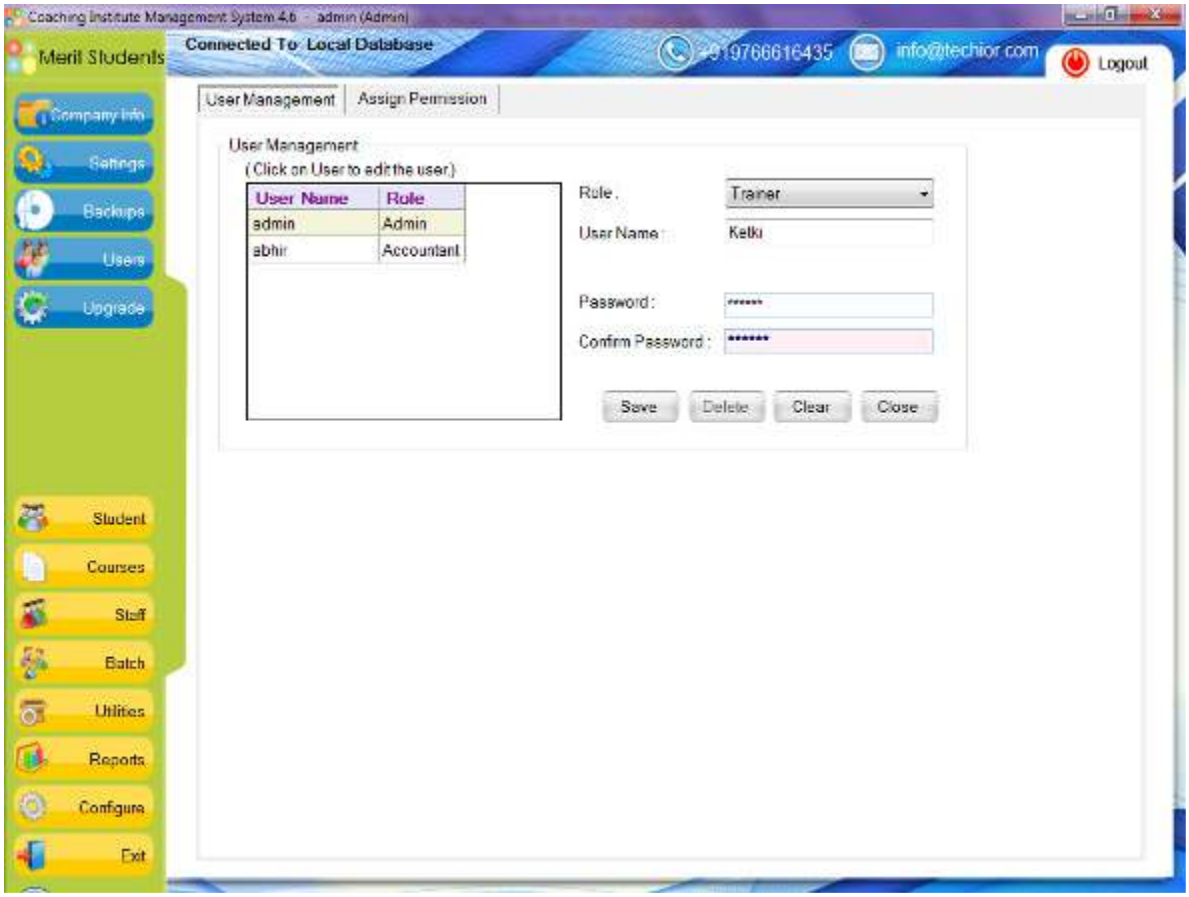

Data restored successfully.
OK

Users

User Management:

Path: Configure > Users>User management

Here you can perform the User Management for your CIMS software. You can add new users, and configure them so that they may or may not have administrator privileges. Here you can assign different permissions to the different user according to their role.

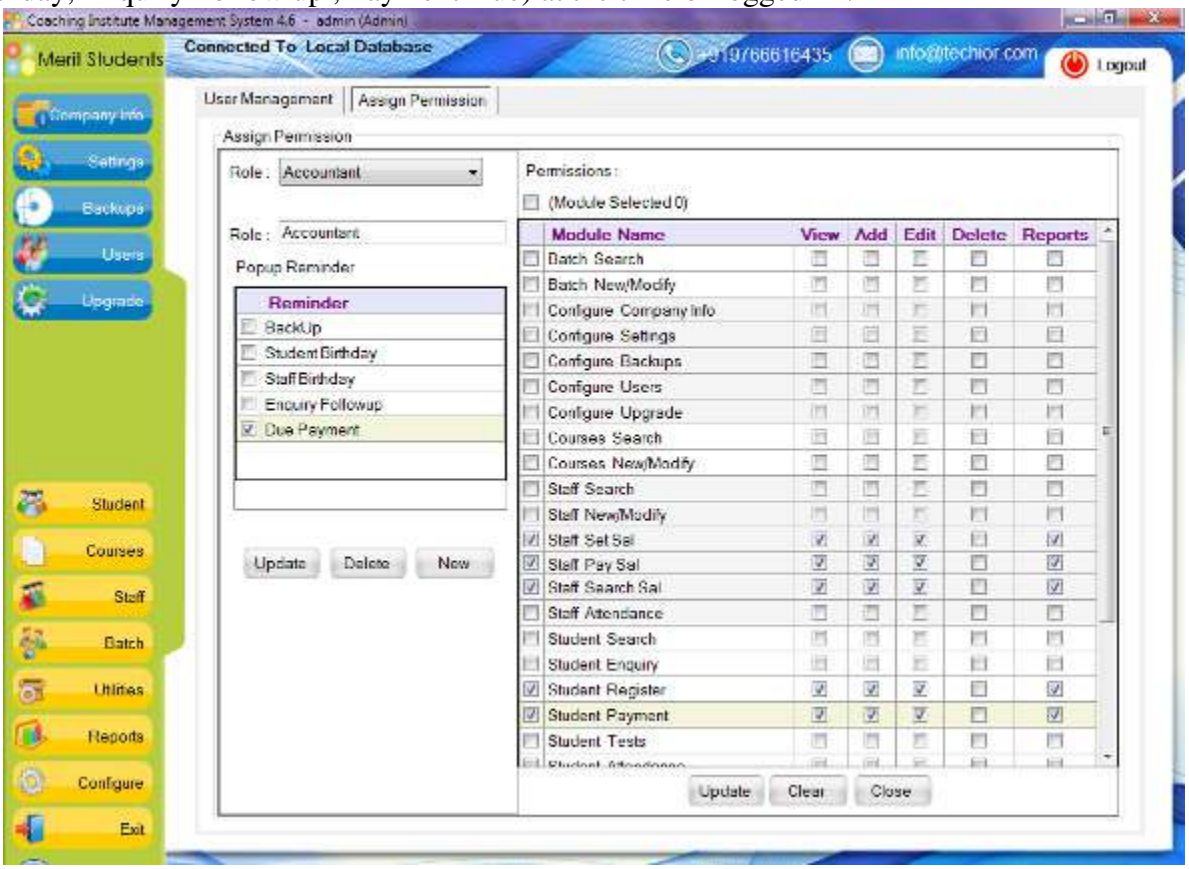


If the existing users User name Or password has to be changed ,tick on the check box of Change password & change the password or username & click on update .Here the user is now saved with the new password Or Username.

Assign permission:

Path: Configure > Users> Assign permissions.

Here the user can be given different permissions related with his role at the same time the user can also be allowed to get different reminder pop up(Student Birthday, Staff Birthday, Enquiry Follow up , Payment Due) at the time of logged in .



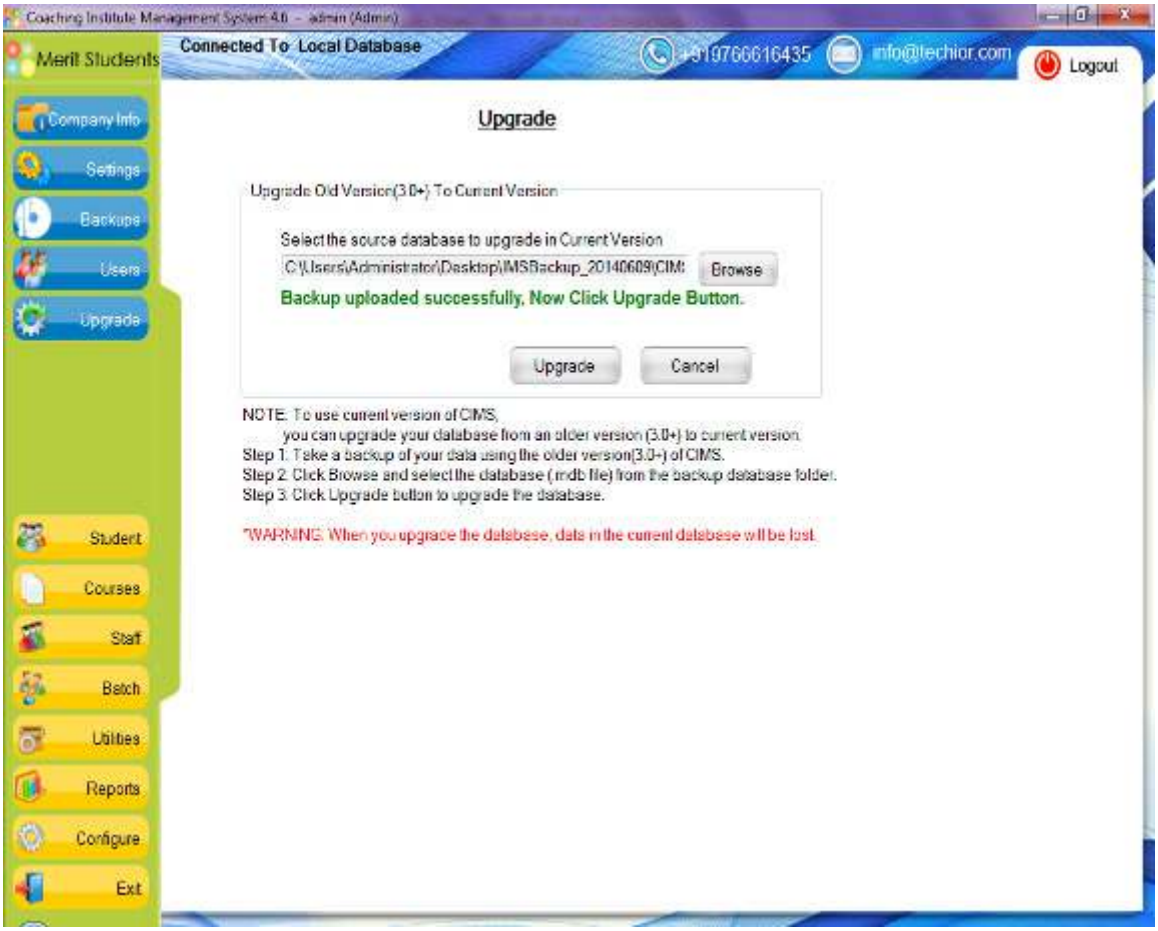
For eg. For account role all the payment related permissions can be given. Here the Admin can decide which permissions (View, Add, Edit, Delete, Reports) of a particular module can be given to the user.
Once all the permissions are assigned to the user,permissions related with the Reminder pop up can be assigned to the user.

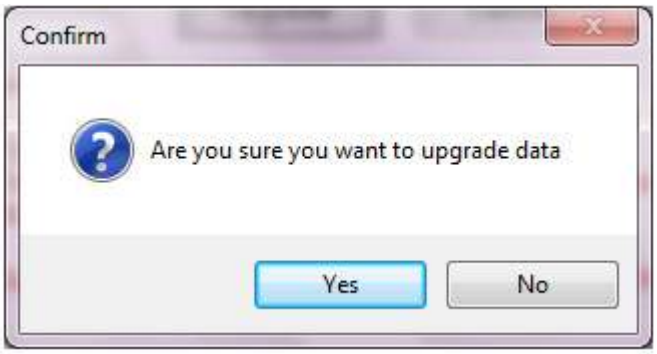
NOTE: When the reminder related permissions are assigned to the user the related module permission must be assigned to the user.(If the accountant has assigned a Payment Due reminder, admin has to assign the register student module permission to the Accountant)

Upgrade:

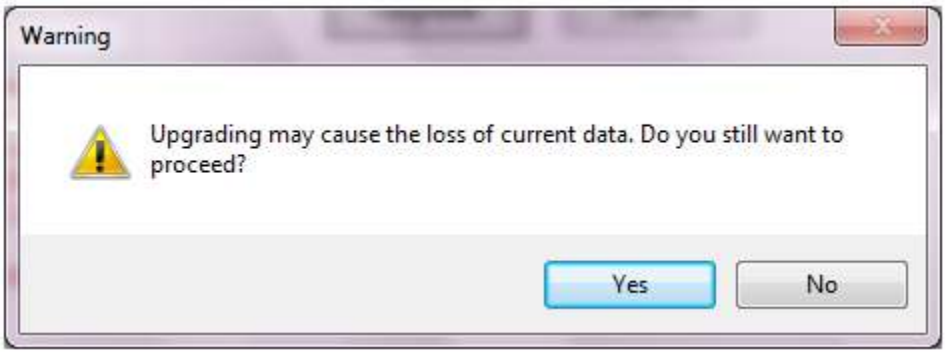
Path: Configure > Upgrade

Here you can upgrade the older version to the newer one. If the user is having the older version (CIMS 3.0+ up to CIMS4.0), click on upgrade button following window will open, click on browse button & select the folder where the back up of older version is stored. Click on Upgrade button. It will ask for confirmation as shown in the next window. Click on yes.

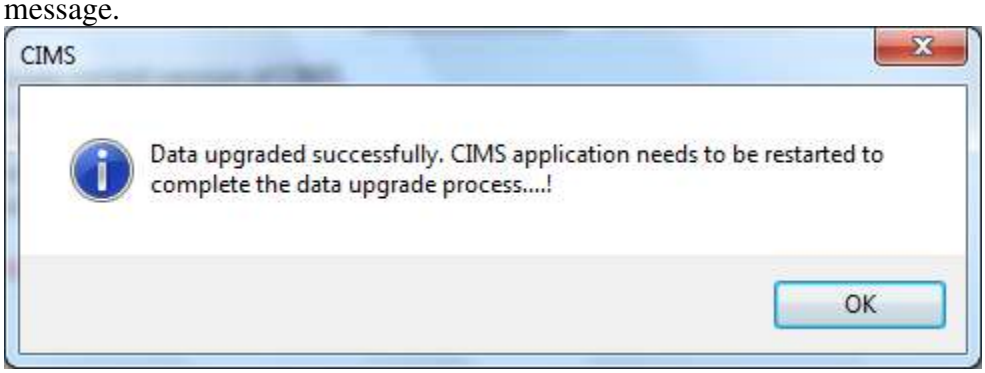




Now it will give Warning message as shown below.



After clicking on yes, it starts upgrading the database. All the data of older version is migrated into the new version. Once all the data is migrated, it will give confirmation message.



Click on OK for the message the application will get automatically restart in order to update the data.

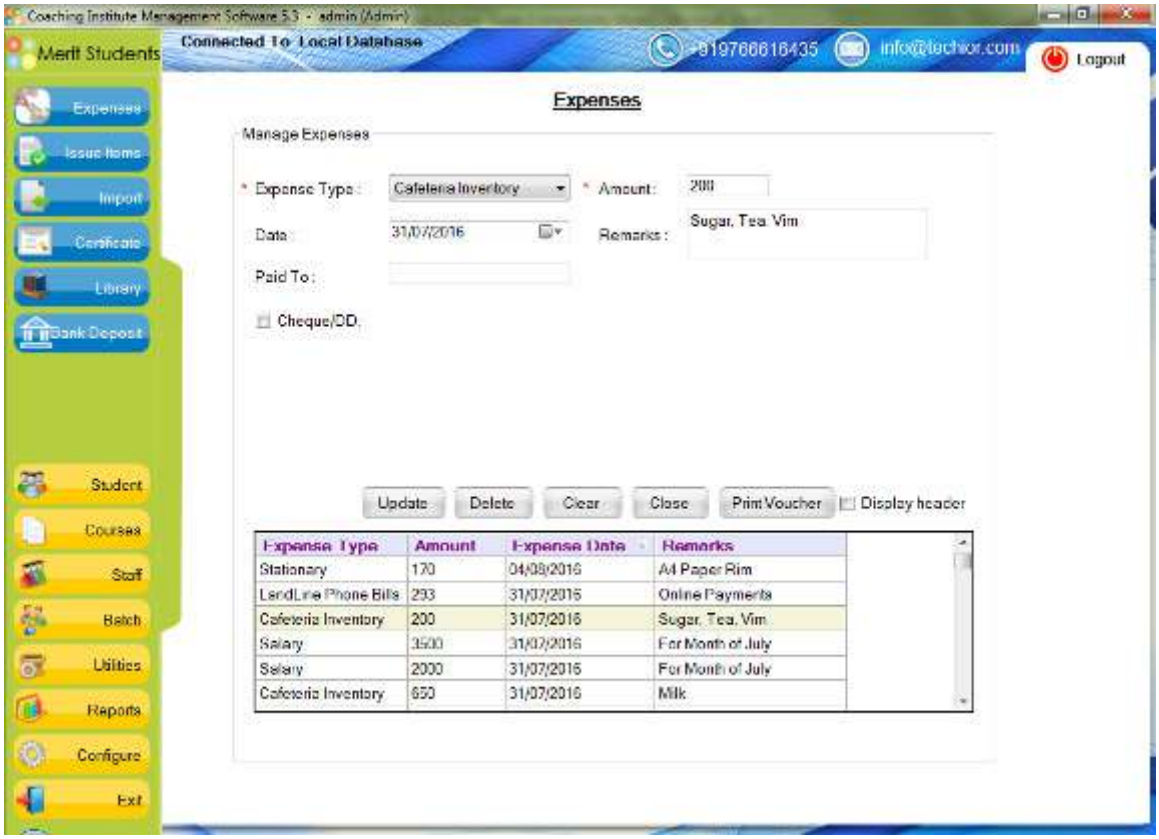
Expenses

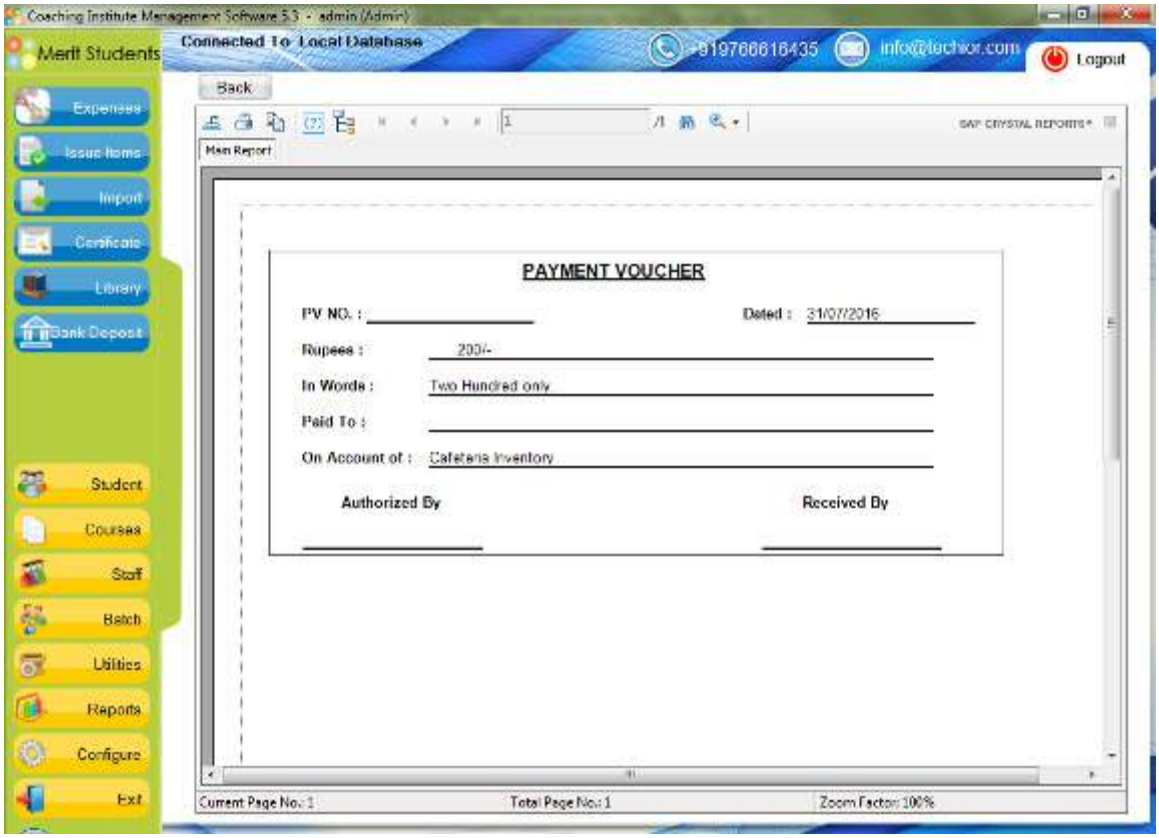
Utilities > Expenses

The Expenses tab in the Payment module is used to keep track of the expenses which are being incurred in the institute on a day to day basis. This can be used to keep a record of all the bills (like electricity, telephone, etc.) and also other recurring expenses (like stationary, equipment, refreshments, etc.)

The expense type is defined in the Configuration section. While making an entry for an expense, you can just select the expense type from the list, enter the date of expense, the amount and any remarks that you may want to add. Click on "Save" button to save the expense entry.

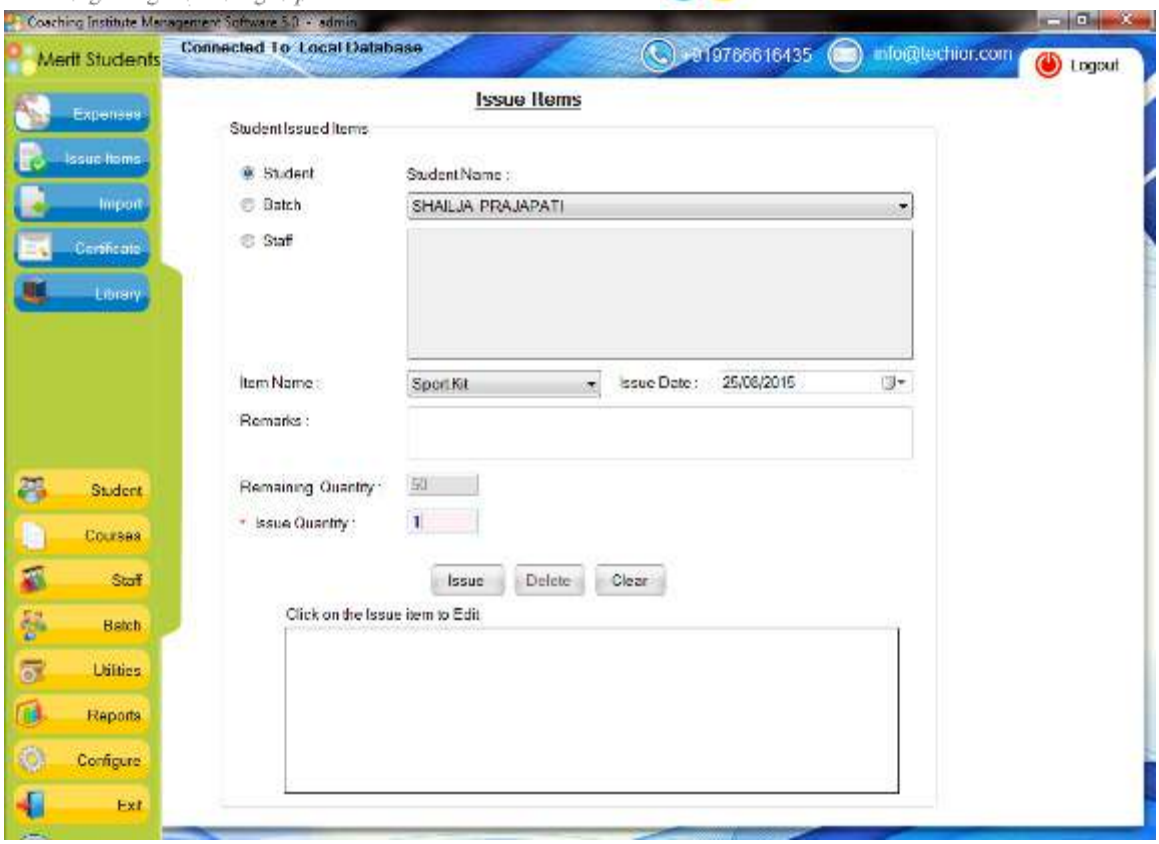
Print Voucher : Voucher can be printed for the expense.





Issue Items

The “Issue Items” tab is used to keep track of the items that have been issued to the registered students or to a batch or to a staff. User can select the name of the student/Batch/staff to whom the item is being issued, the date of issue, the item name and add the appropriate remarks. The items that can be issued are configured in Utilities > Issue Items tab.



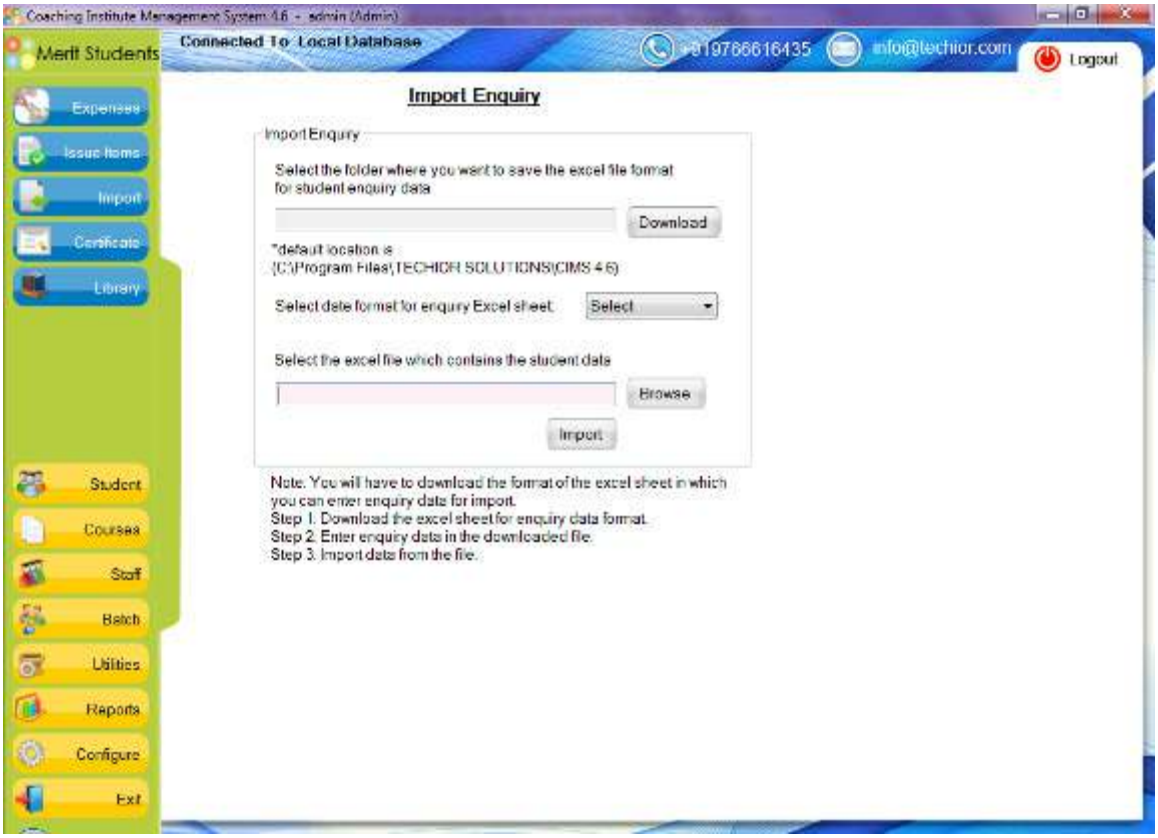
Import

Path: Utilities > Import Enquiry

Import is used to import student enquiry data from an excel spreadsheet into the CIMS database. This is useful for the first time users of the software – the student data available in excel can be directly imported into CIMS, thus saving the effort and time required for data entry.

The student data should be available in a specified format in excel. Before importing the data, user needs to set the system date to dd/mm/yyyy format. In order to set the specified date format, select Control Panel - Regional and Language Options. In “Regional Options” tab, click “Customize” button. Then select the “Date” tab, and enter dd/mm/yyyy in Short date format. Click “Apply” to save the format.

Import Enquiries Window:



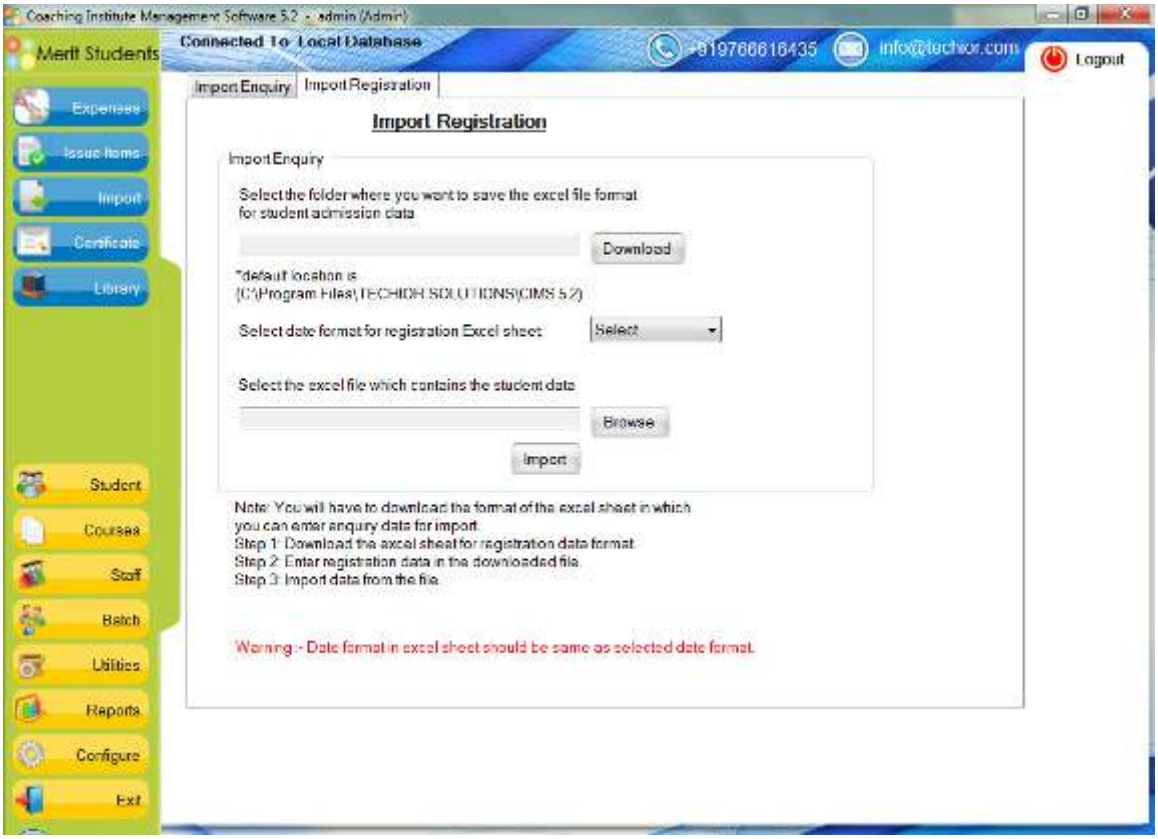
Click on “Download” to choose the download path to download the import format file.

Once the system date format has been set, click “Browse” button to select the excel sheet from which data has to be imported. Make sure that the excel sheet is in the specified format (see sample excel sheet in the directory in which CIMS has been installed). Then click “Import” to import the data from the excel sheet to the CIMS database.

Import Admission details:

Import is used to import student admission data from an excel spreadsheet into the CIMS database. This is useful for the first time users of the software – Previous students,thus saving the effort and time required for data entry.

The student data should be available in the specified format in excel. Before importing the data, user needs to set the system date to dd/mm/yyyy format. In order to set the specified date format, select Control Panel - Regional and Language Options. In “Regional Options” tab, click “Customize” button. Then select the “Date” tab, and enter dd/mm/yyyy in Short date format. Click “Apply” to save the format.

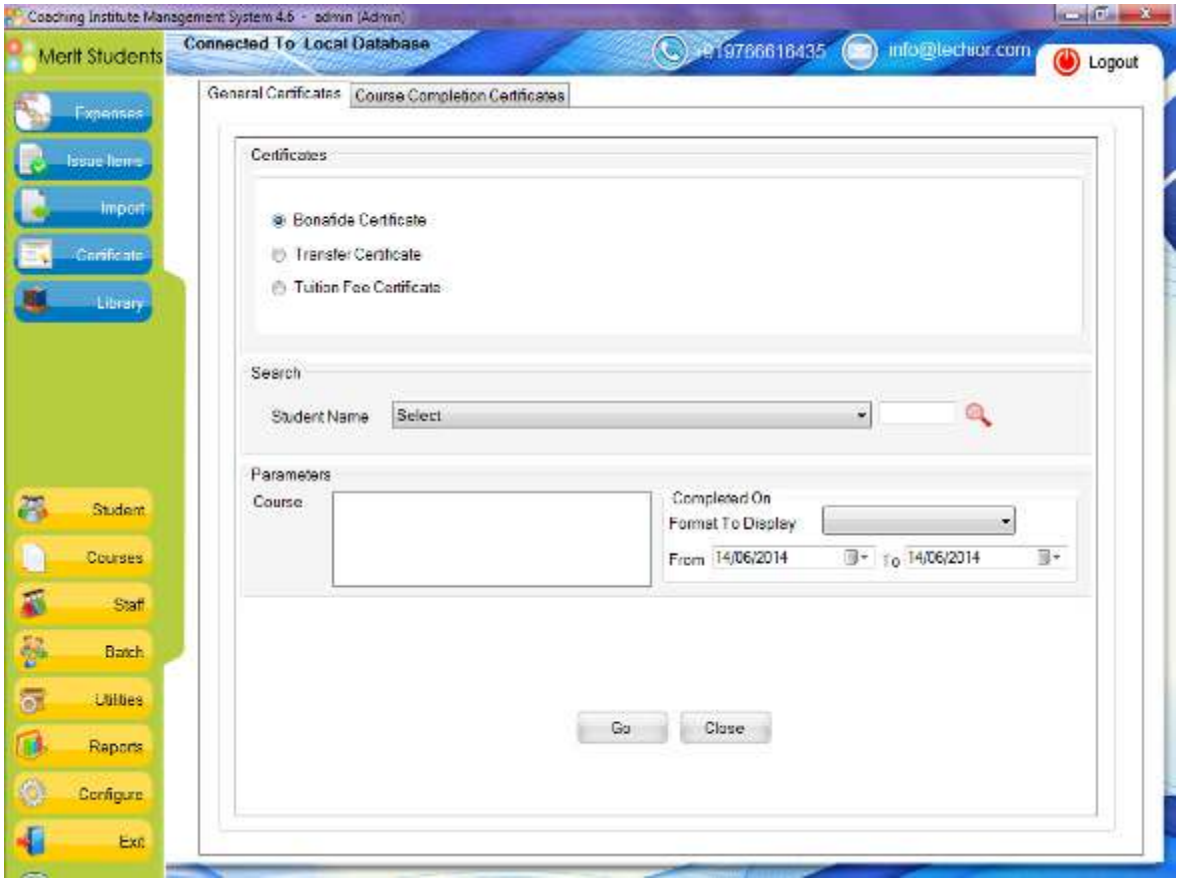


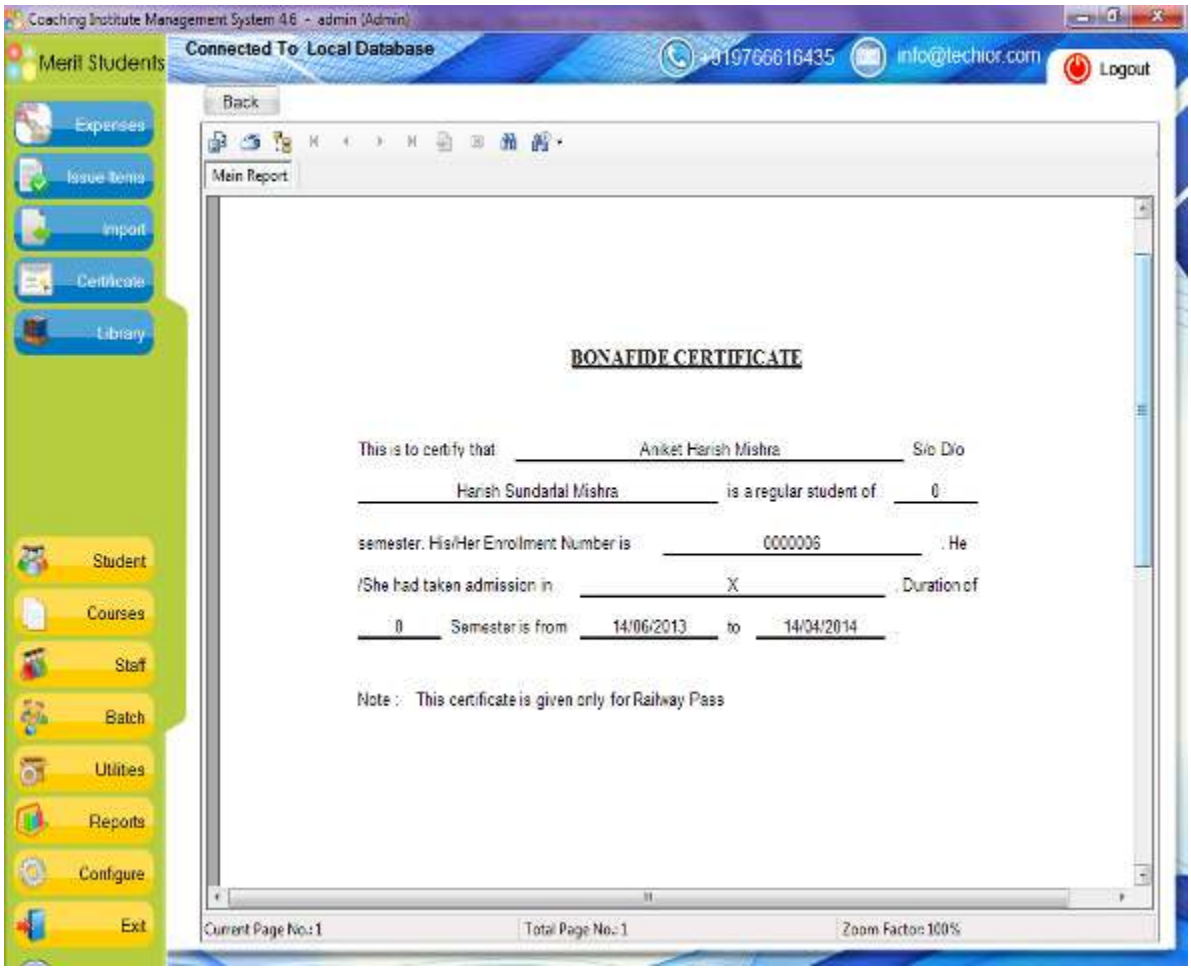
Certificates:

Here the student certificates can get printed.

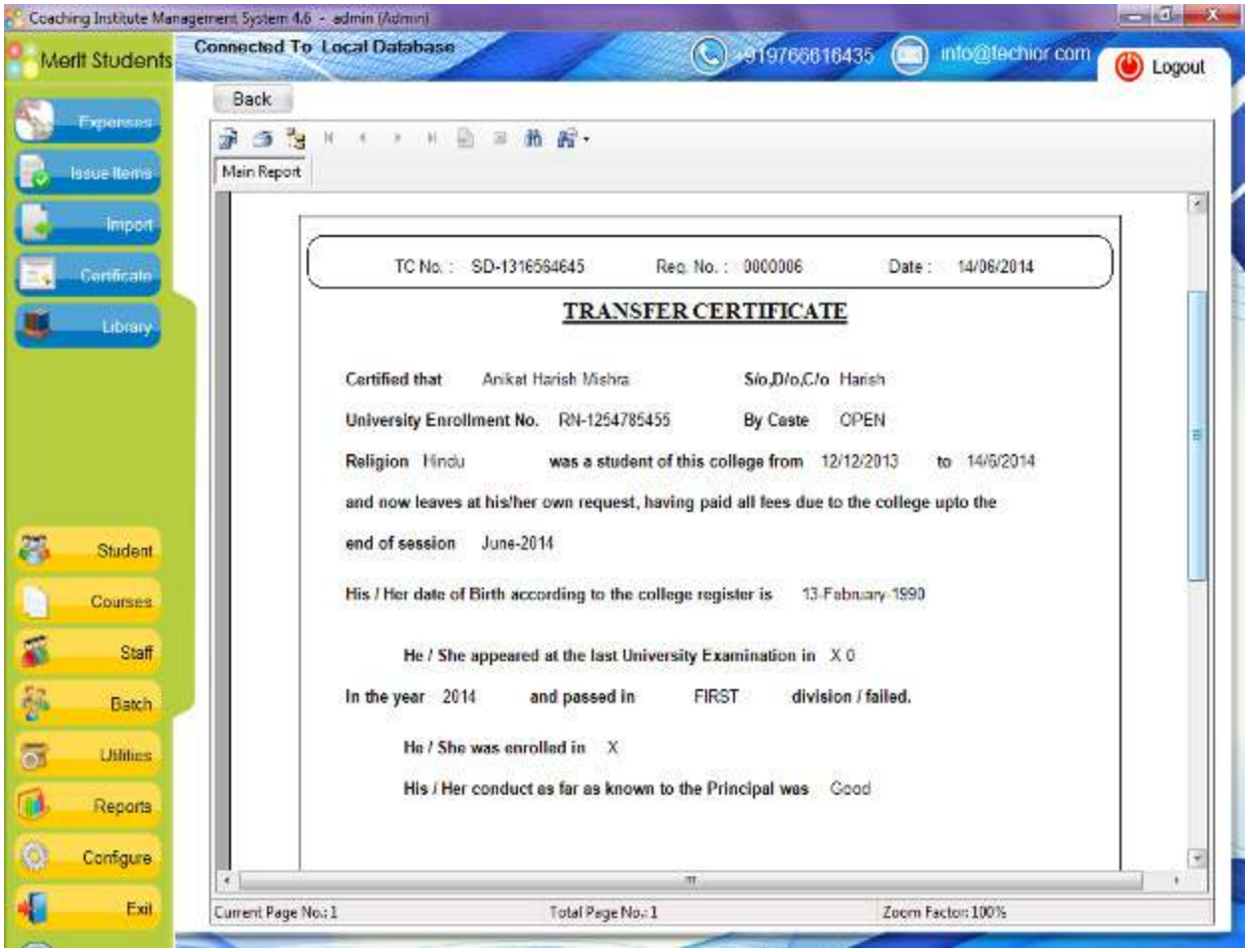
1. General certificates 2. Promotional certificates

In general certificates, bonafide certificate can be printed as shown below.




Coaching Institute Management System 4.6 - admin (Admin)
Merit Students
Connected To Local Database
+919766616435
info@techior.com
Logout
Back
Expenses
Issue Items
Import
Certificate
Library
Student
Courses
Staff
Batch
Utilites
Reports
Configure
Exit
Main Report
BONAFIDE CERTIFICATE
This is to certify that Aniket Harish Mishra S/o D/o
Harish Sundarlal Mishra is a regular student of 0
semester. His/Her Enrollment Number is 0000006 . He
/She had taken admission in X . Duration of
0 Semester is from 14/06/2013 to 14/04/2014
Note : This certificate is given only for Railway Pass
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 100%

2. Transfer certificate can get printed as shown below.



Promotional certificates:

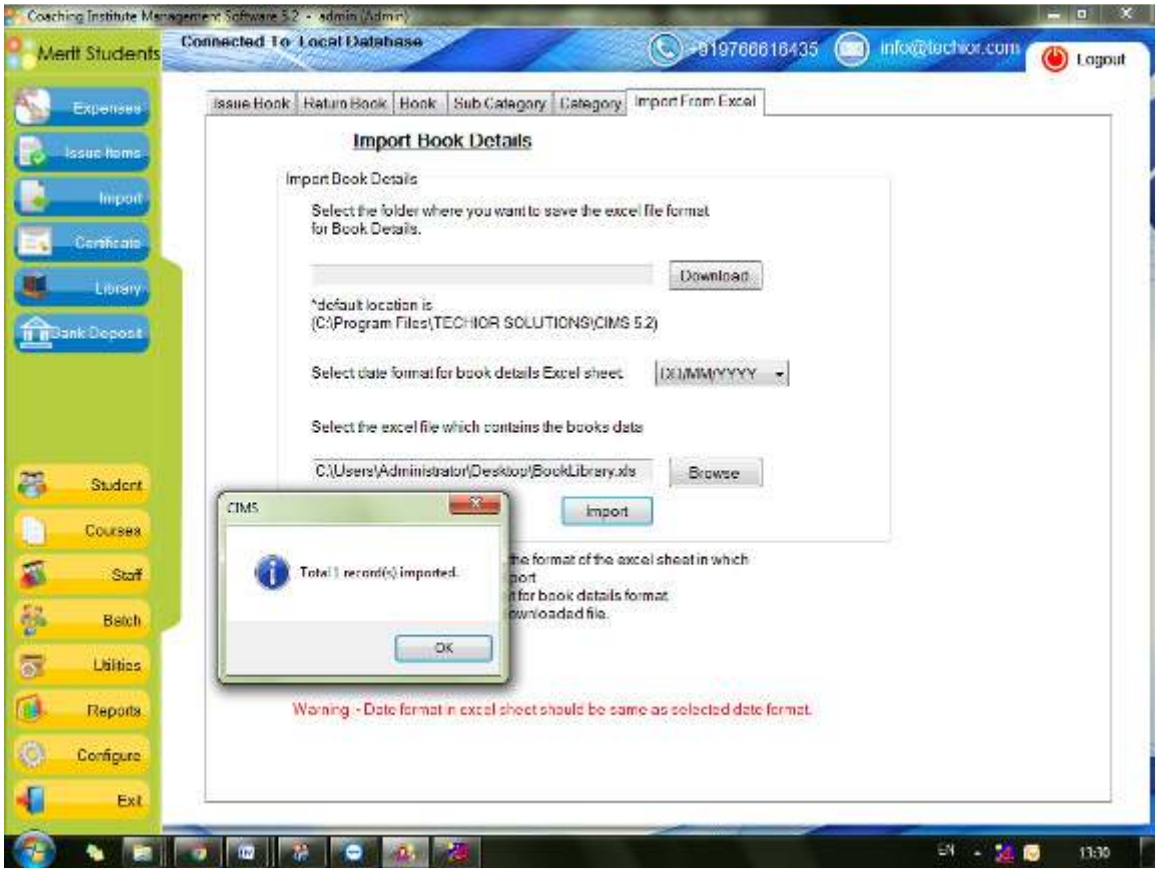
Five different themes are available, user can select any theme and can print the certificates student name wise, Course wise & batch wise.

Library:

This module is used to keep record of different types of books details, issued book & returned book.

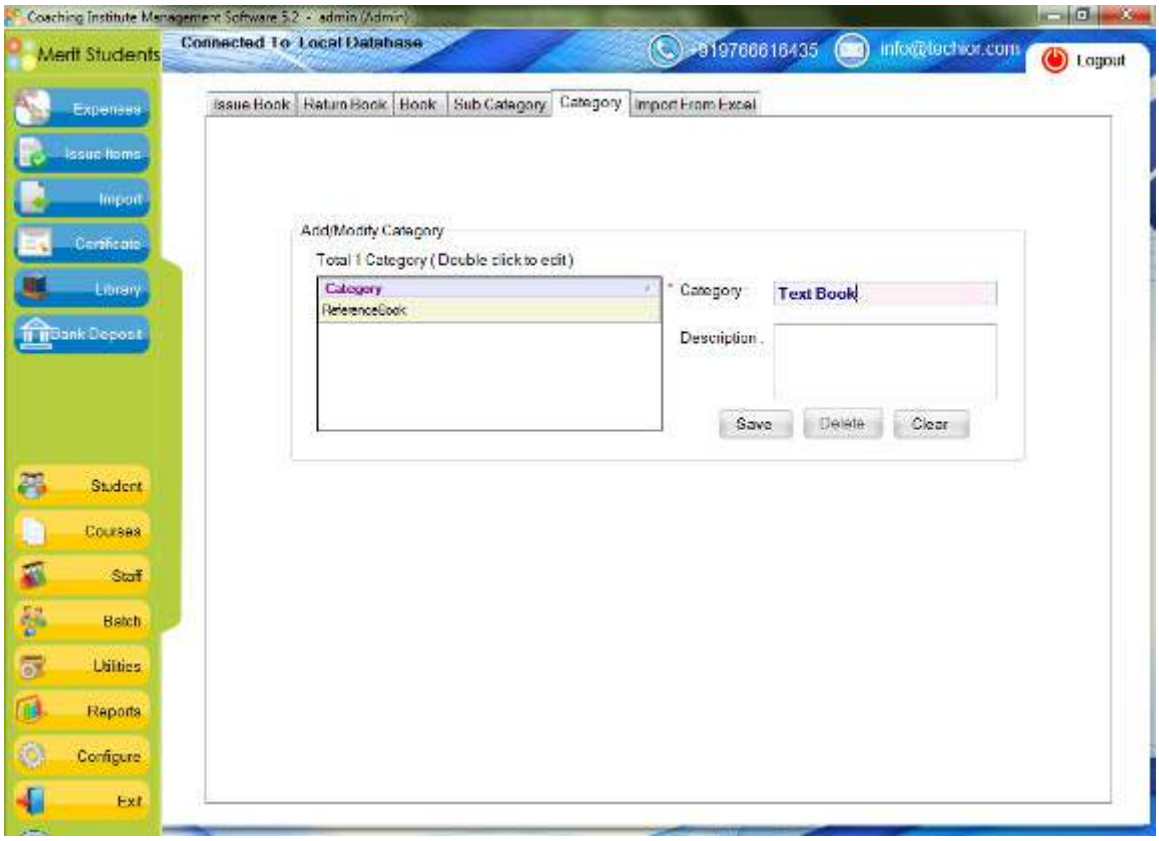
Import Library Details:

You can import library book details also**.** Click on download to download import file format. Enter at least mandatory fields in import file. Then click on browse to access import file & click on Import, it will import the book details entered in excel file



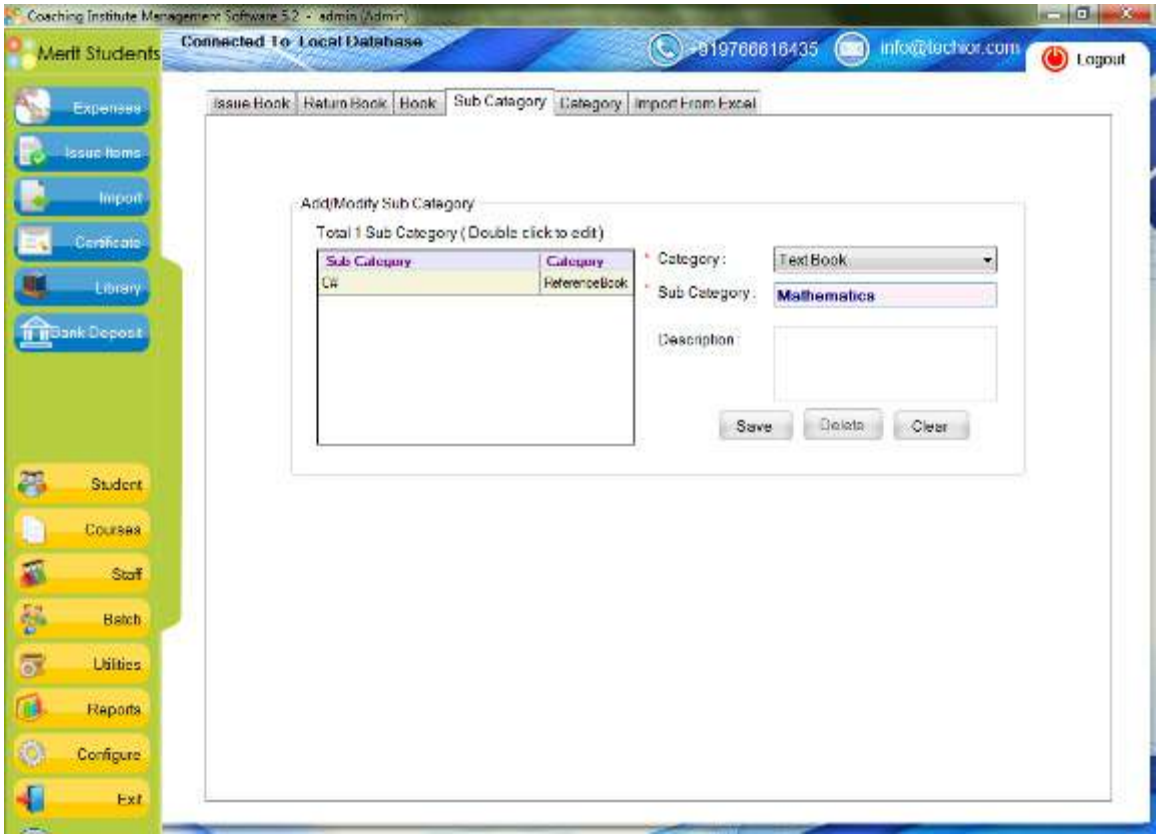
Book category:

To Enter book category go to Utilities->Library & select category, add category & description if any & then click on save .



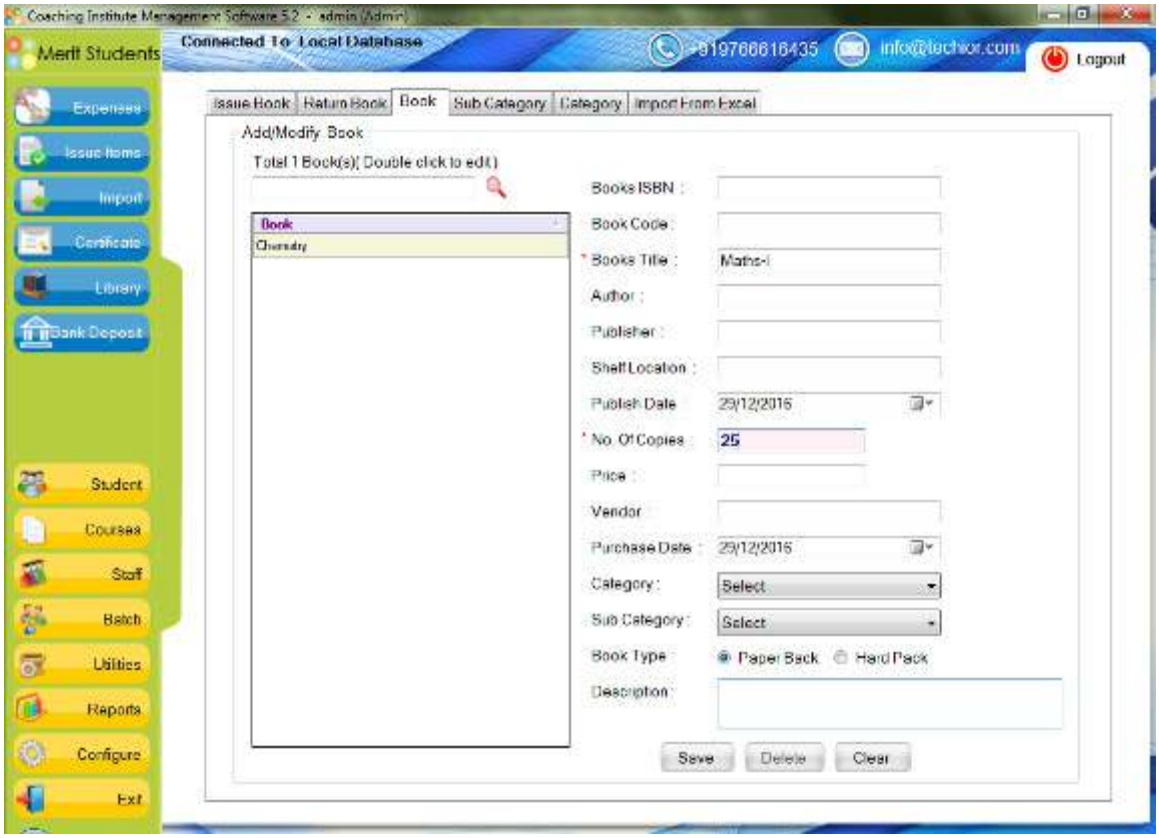
Sub-category:

To Enter book category go to Utilities->Library & select sub-category, add sub-category & description if any & then click on save.



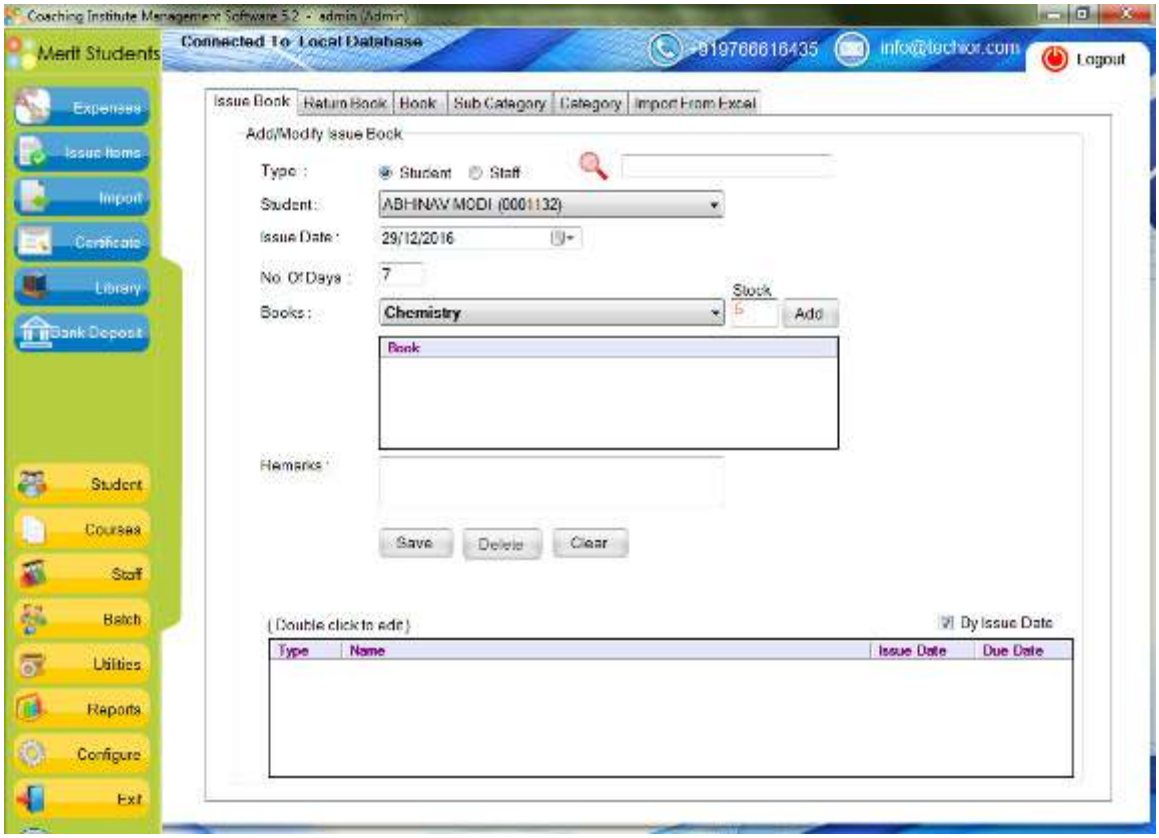
Book:

To enter book details, go to Utilities->Library & book, add category & description if any & then click on save.



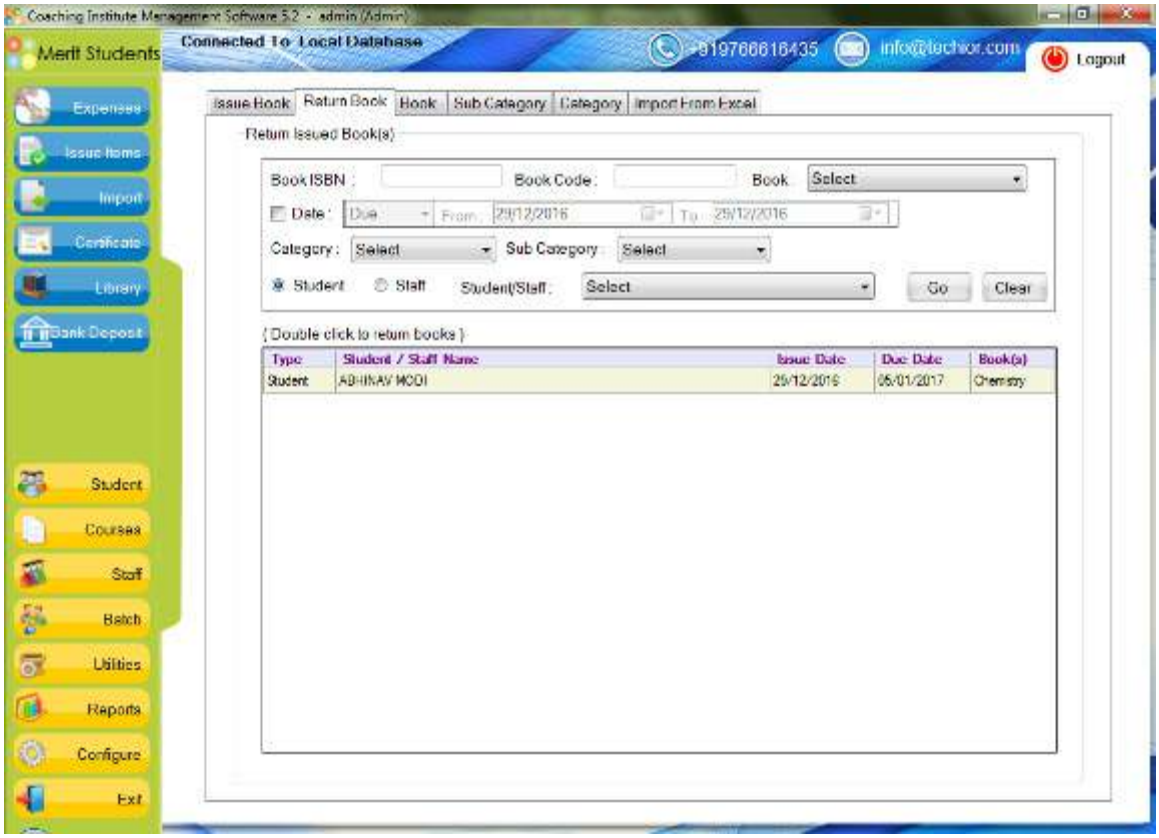
Issues Book:

To issue book to the student or Staff , go to Utilities->Library & select issue book, select either staff or student & select the book to be issued to the student ,then click on add & click on save .

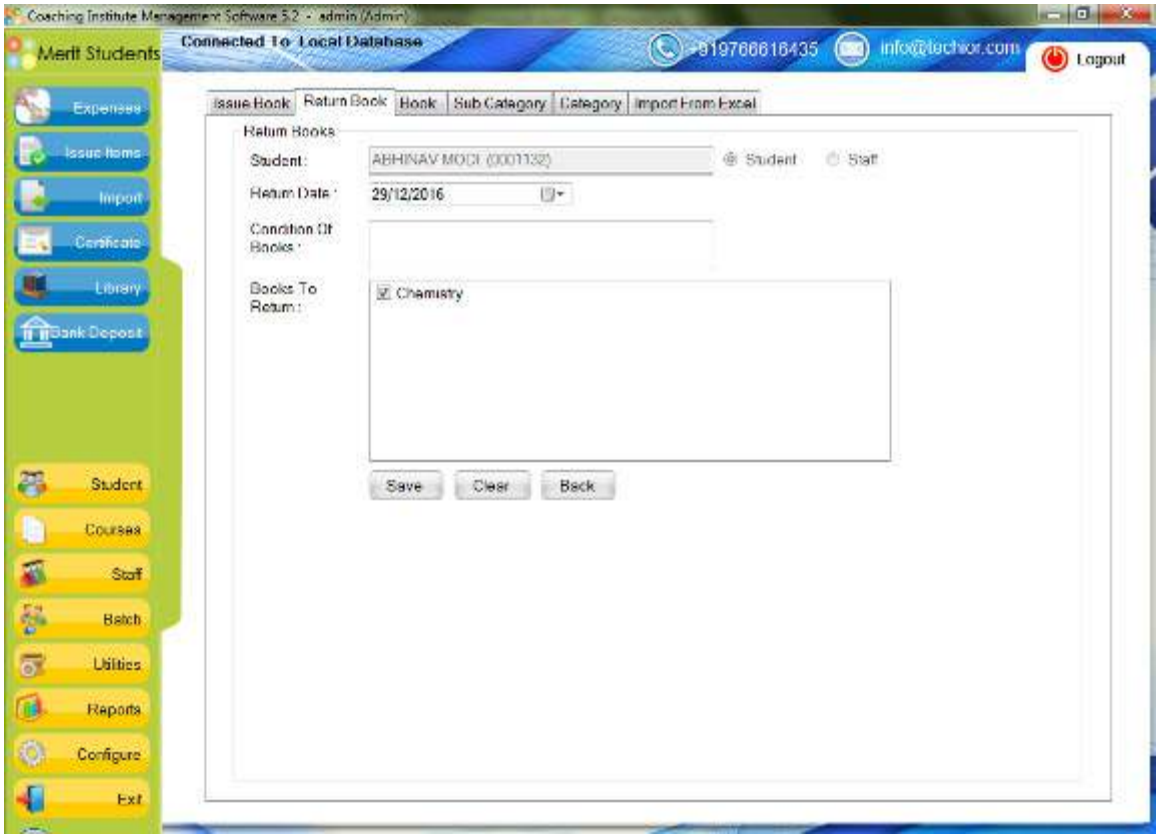


Return Book:

To take book return from the student or Staff, go to Utilities->Library & select return book, select the required fields for search & click on go, it will show the list of staff or student to whom book is already issued.



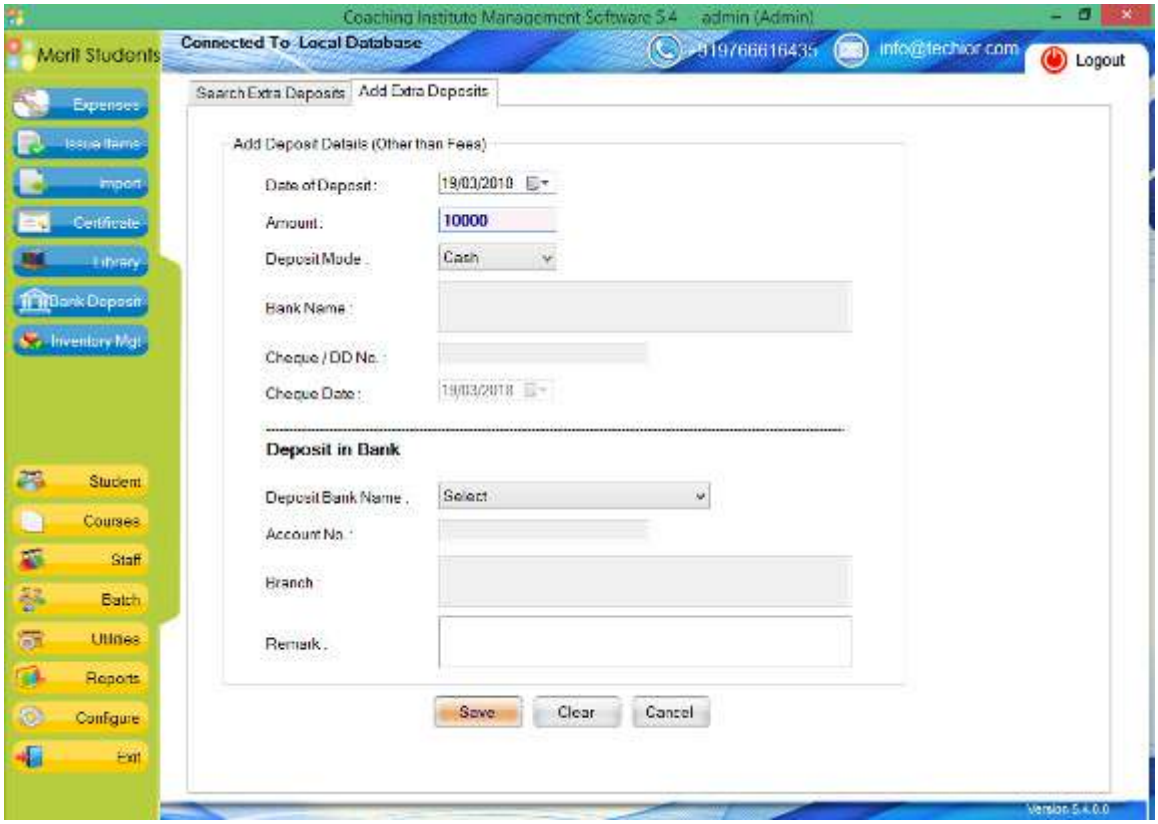
Double click on student or staff name, it will take you to return book form as shown below.



Select the book to be returned & click on Save.

Bank deposit:

Here you can deposit. Other amount as Extra Deposit and save the details using Save button.

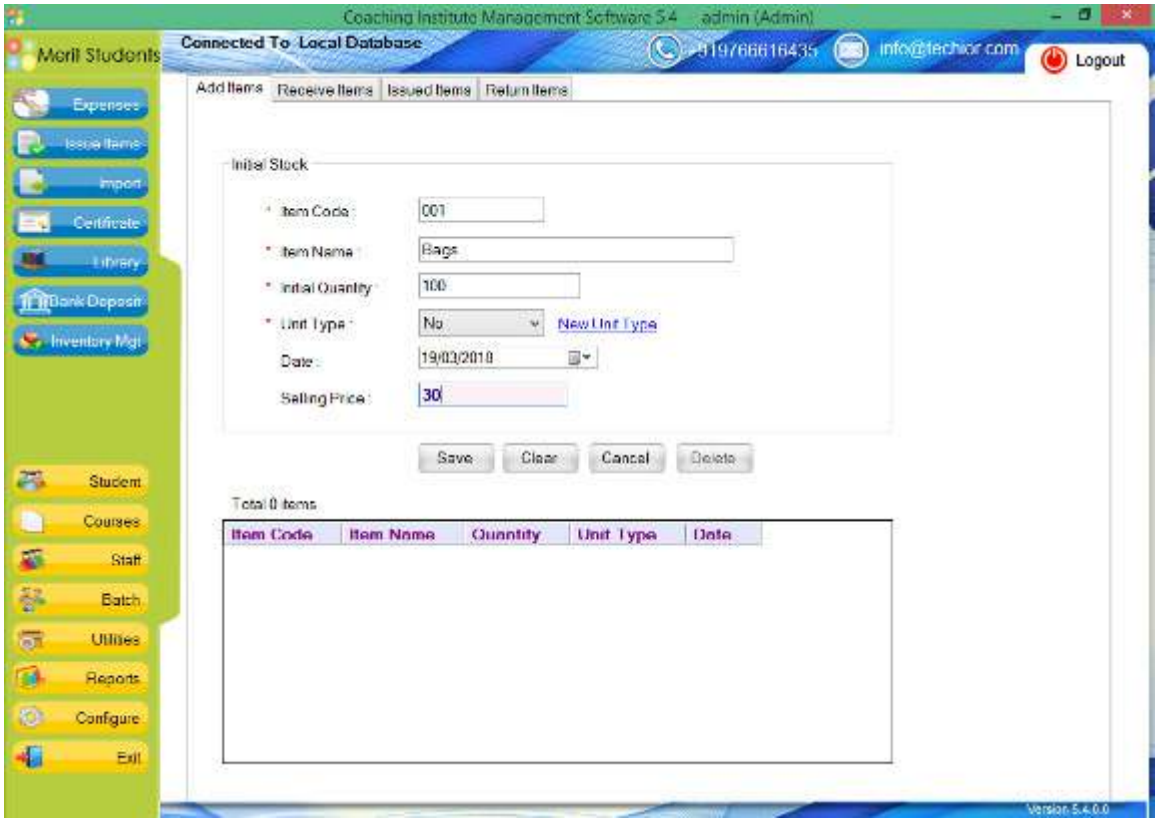


Inventory management:

Go to Utilities > Inventory management

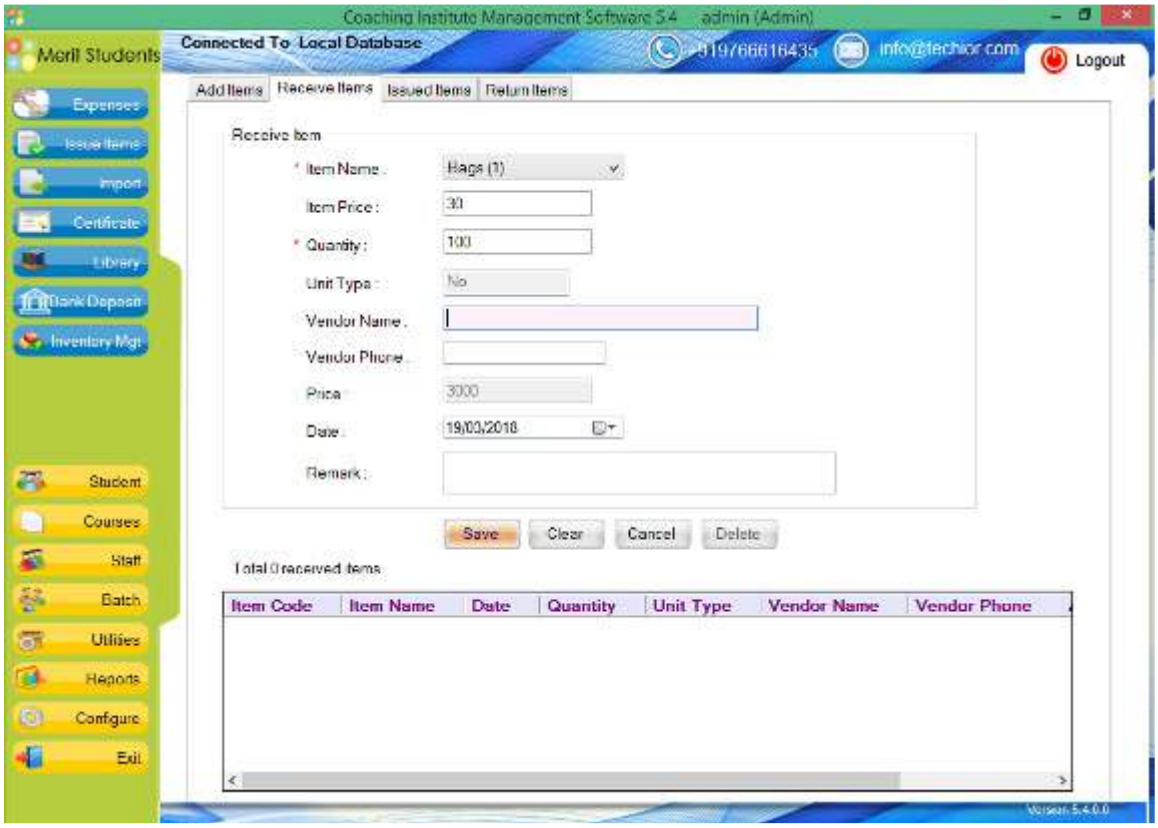
Add Items:

Enter item code, item name, initial quantity, unit type & selling price for the item to be added in an inventory and click "Save" to save details.



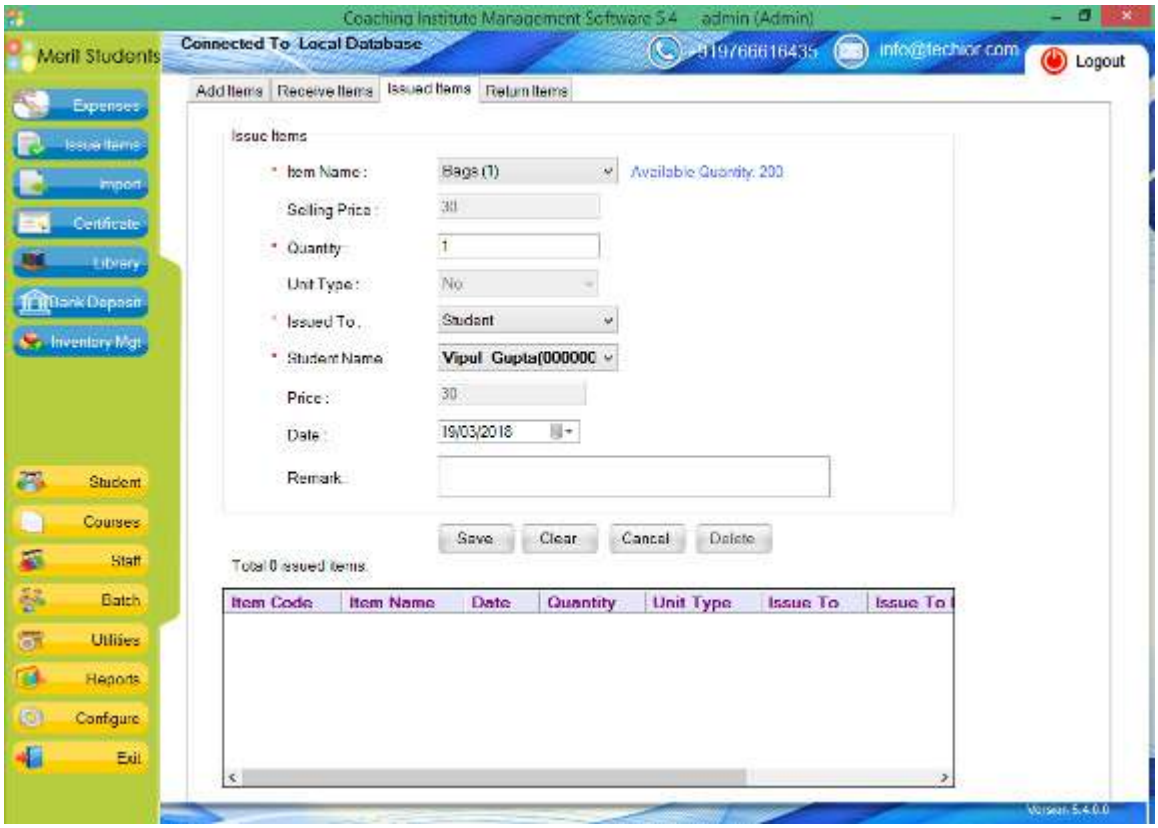
Add Receive Items:

Select the item which has been received enter the other details for the item received then click on Save to save the received item entry.



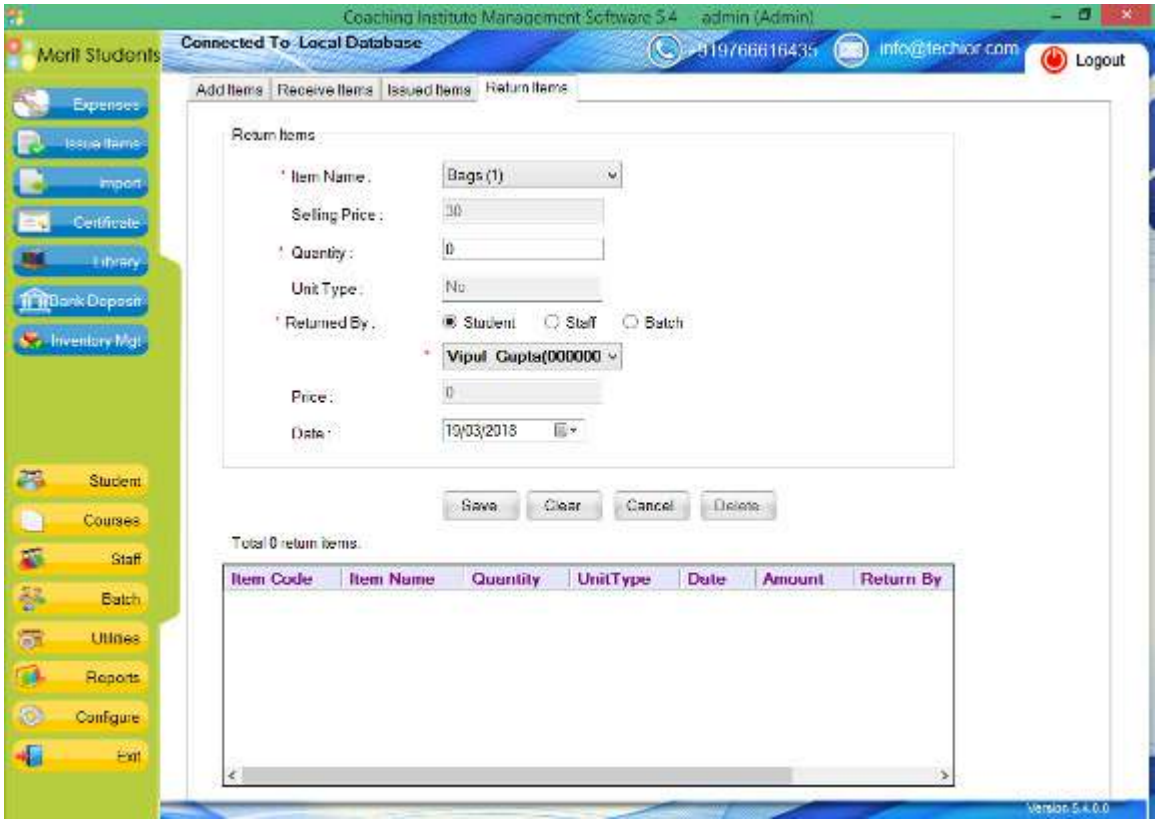
Add Issued Items:

Select the item which is to be issued, enter the item quantity, then from Issued to select to whom you wants to issue item like student, staff or a batch then accordingly select student name, batch name or staff name and click "Save" to save the issued item entry details.



Add Return Items:

An item which has been issued earlier can be returned. Select the item which isto be returned, enter the item quantity of receiving item, then from Returned by select from whom you wants to take item return like student, staff or a batch then according select student name, batch name or staff name then select date of return and click "Save" to save the returned item entry details.



Student Module

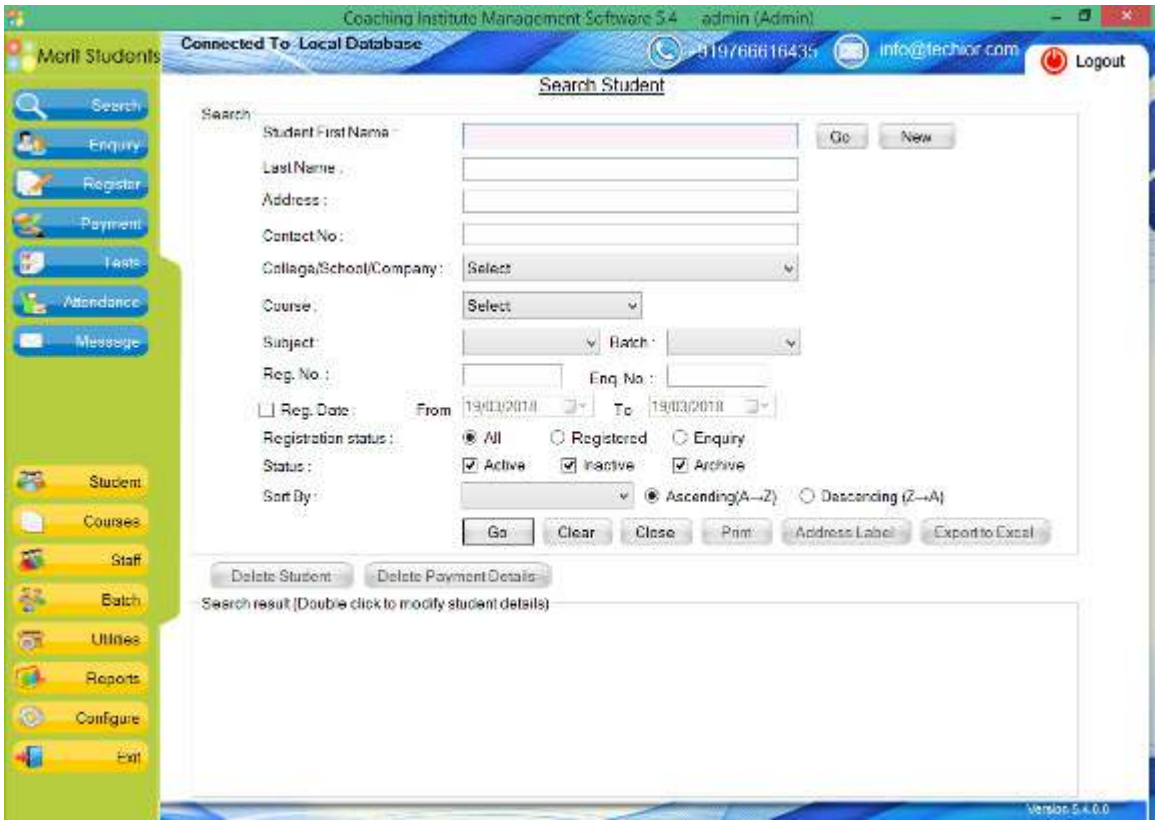
The features include:

a) Search: Find student(s) in the database which meet the search criteria specified. The search criteria can be any of the following:

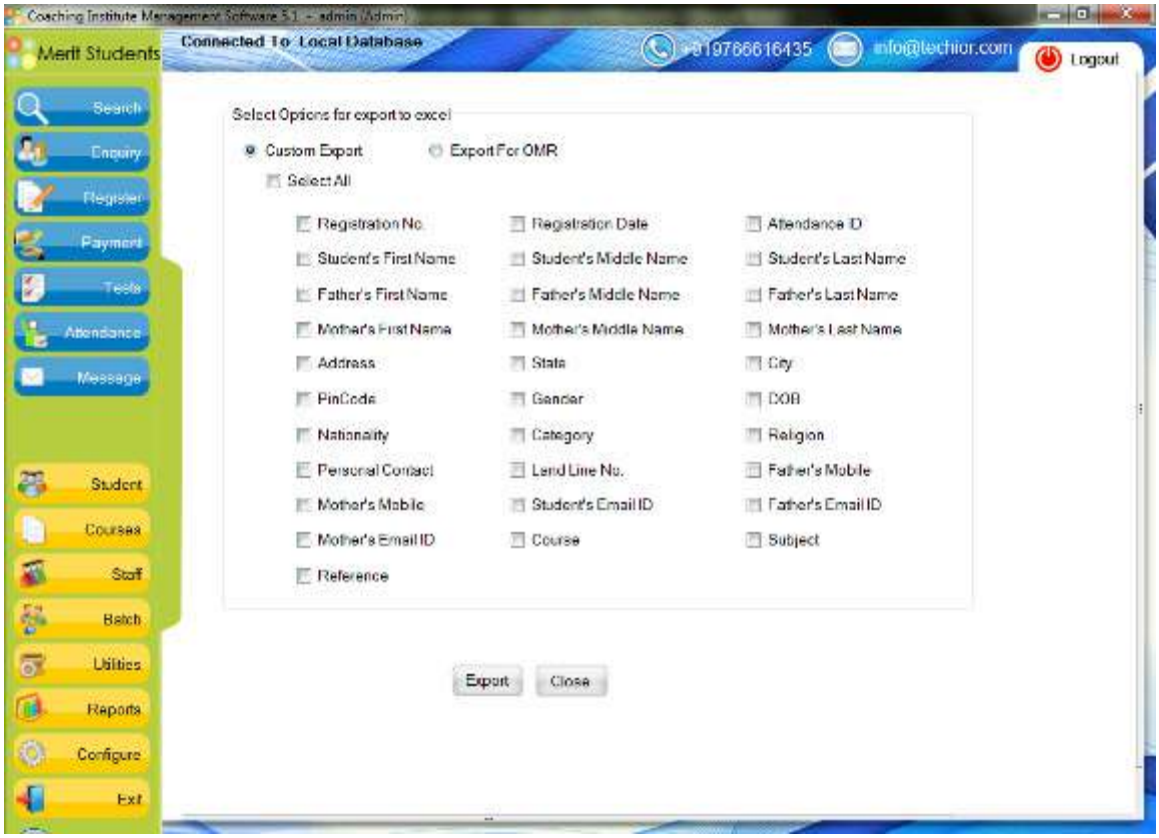
- Name
- Address
- School/College
- Stream (of education)
- Course/Subject in which student is interested / registered
- Batch
- Registration number
- Enquiry number
- Date of Inquiry / date of registration
- Active
- Inactive
- Archive

When a new batch is about to start, the Search screen can be used to get the details of all the students who have enquired about the particular course. This data can then be used to inform the students about the batch start date, any discount offers, etc.

Search Student Window:



Here you can print the list of the searched students. In the same way Address label can also be printed. To export list of the students in excel click on Export to excel button. It will take you to the new form where you can select the field name which you want to export & then click on Export button.
If you want to export the student data which could be imported directly in OMR software (Answer sheet scanner of Techior Solutions Pvt. Ltd.),select the option Export to OMR.



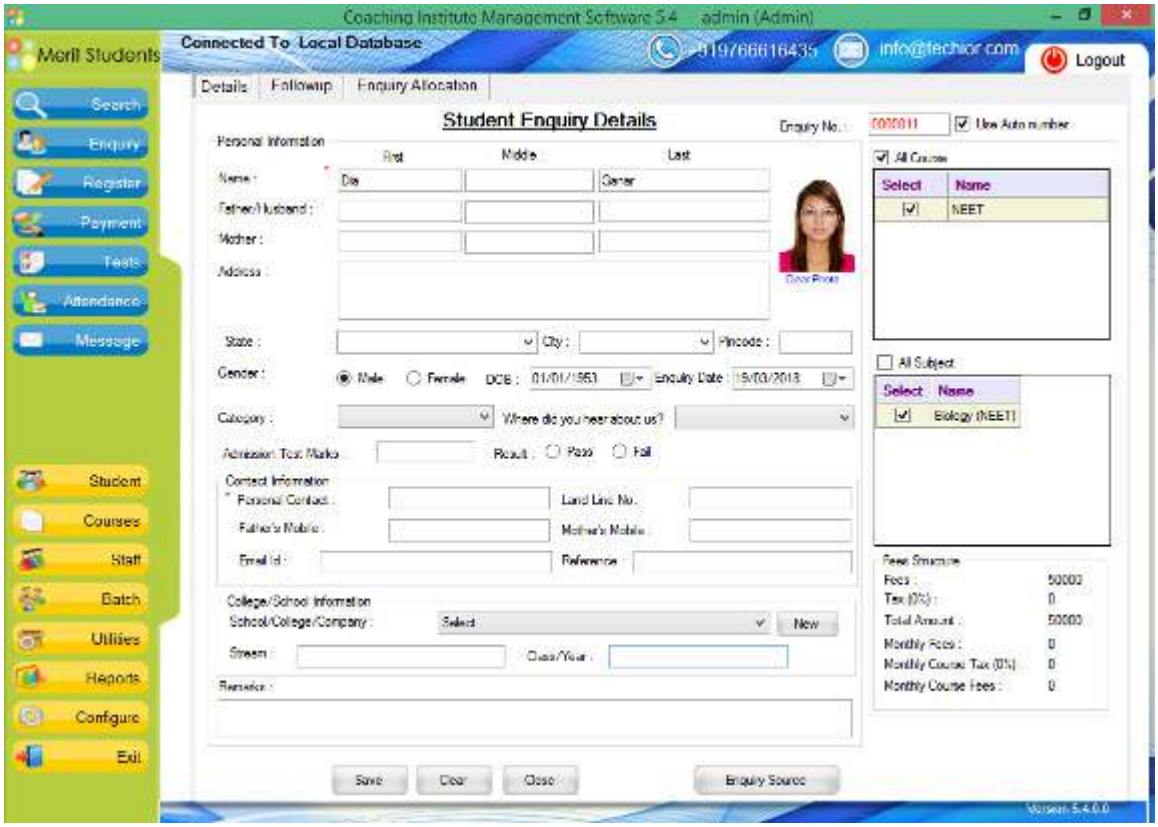
If you want to export the student data which could be imported directly in OMR software (Answer sheet scanner of Techior Solutions Pvt. Ltd.),select the option Export to OMR.

b) Enquiry: Add a new student details.

When a student walks into the institute for the first time to enquire about the courses offered, fees, duration, etc. the student details can be saved using the student enquiry form. Here, you can add all the relevant information like student name, address, contact numbers, date of birth, educational qualification, etc. You can also attach a digital photograph of the student along with his / her contact information. In this form, you can mark the courses in which the student is interested. You can also give enquiry no to student, you can either use auto generated no or can also give manual no for enquires coming to your institute.

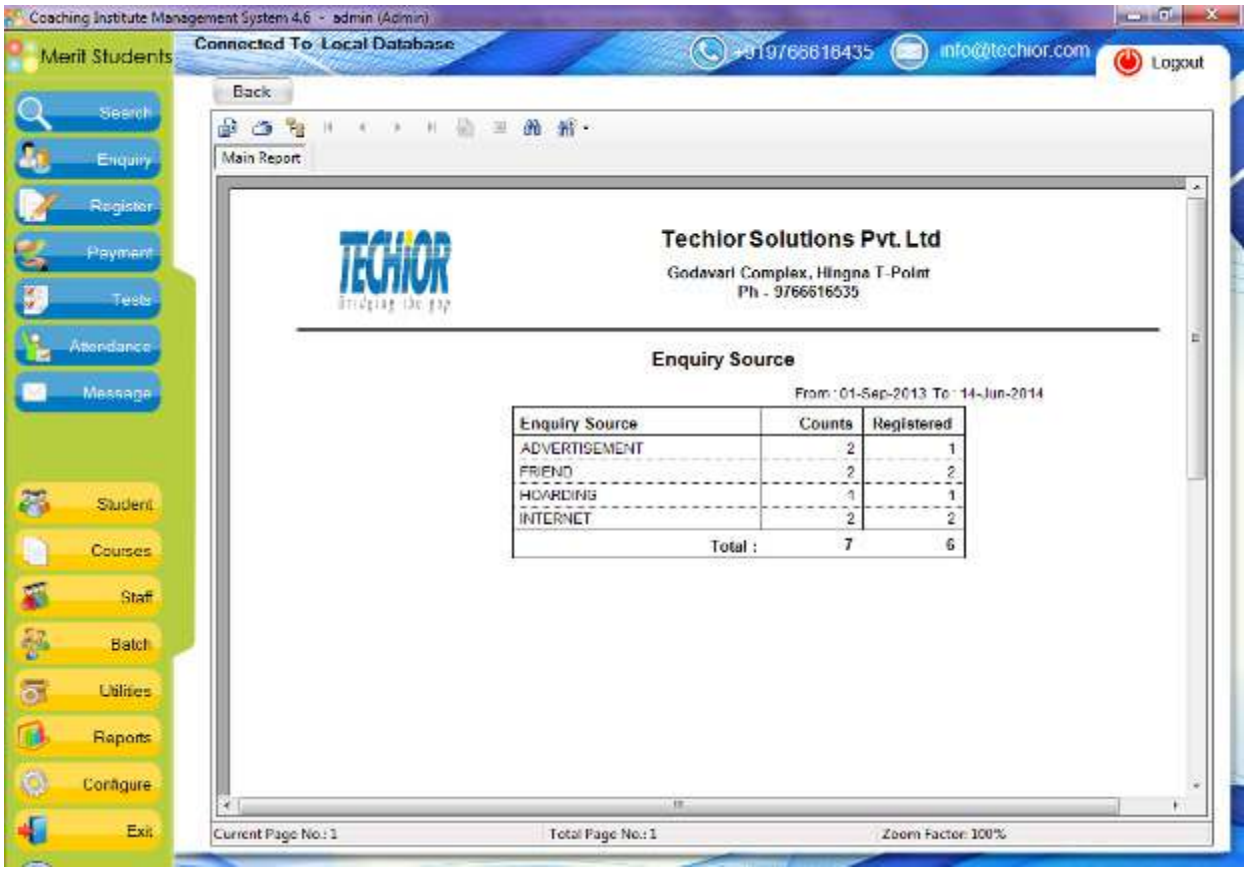
When you click on “Add Photo” on the Student Enquiry Details form, you will find two ways in which you can take the student photo:

1. Browse on the computer to select an existing digital image.
2. Take a picture using Webcam. Just connect you webcam to the computer using USB and take a picture of the student on the spot.



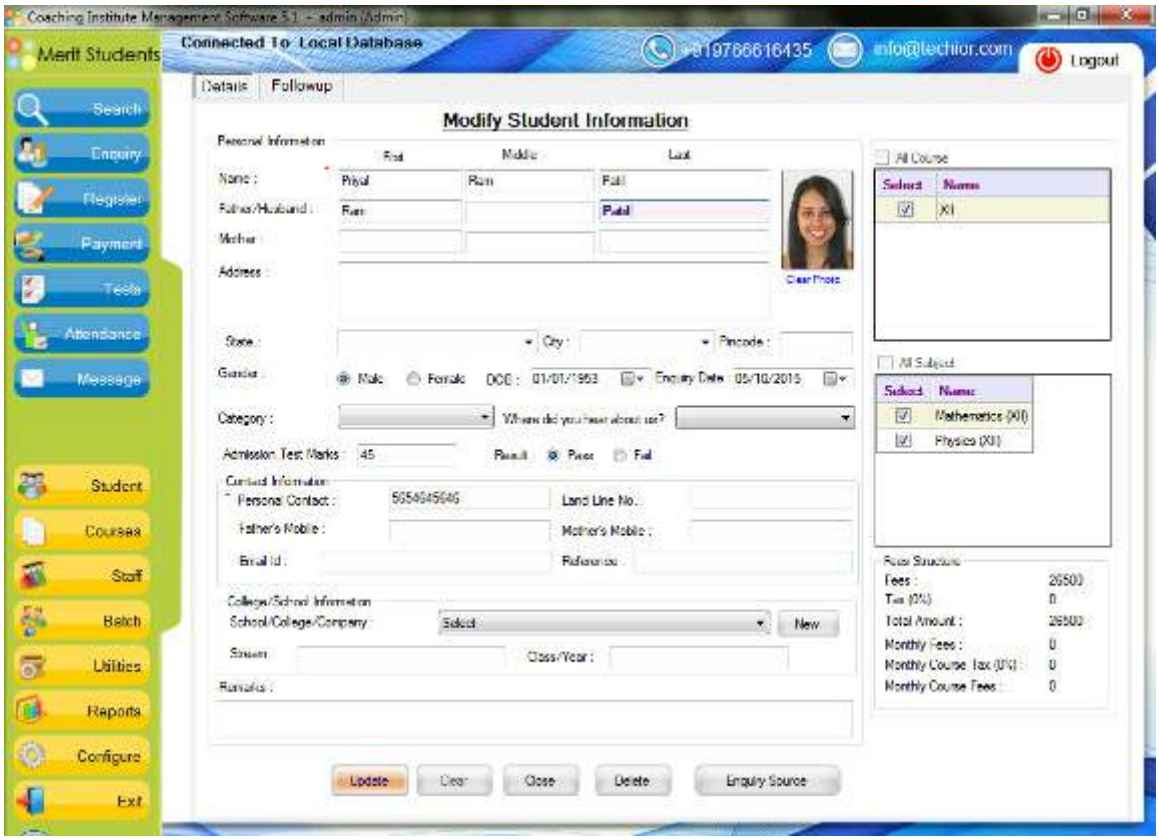
Enquiry Source

On this form enquiry source can be viewed ,click on Enquiry Source it will open the following form where it will show the source of enquiry & the number of enquiries converted in to registration.



Update Enquiry

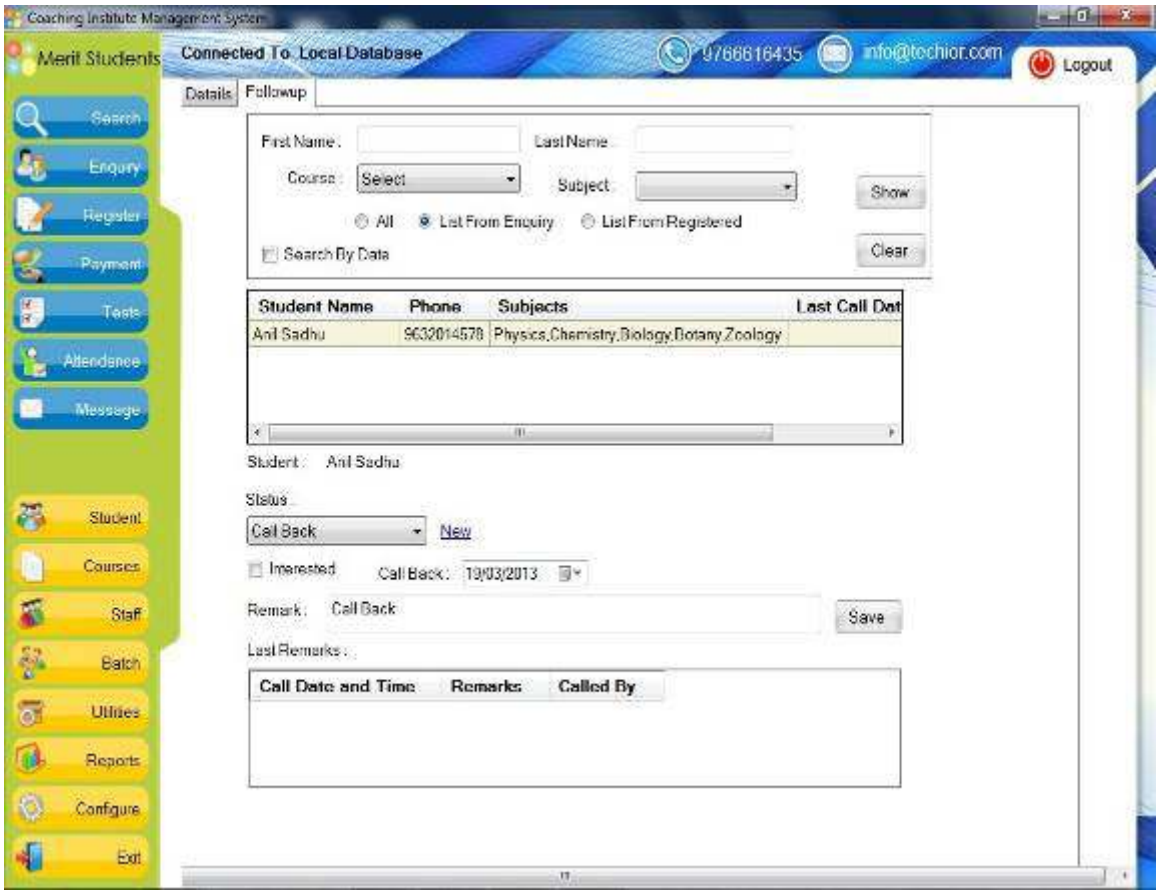
To re-calculate the total fees and perform other changes, open an enquiry student in update mode, perform the necessary changes and click on “Update” button.



Enquiry Follow-up

The follow-up tab provided with the enquiry Details form is to save the details of the follow-up calls which have been made to the students.

Here you can search for particular student lists for which the follow-ups are to be done. You can search for students using First name, Last name or search for all students who have either enquired about or registered in a particular course and/or subject. You can also specify a range of dates within which the enquiry has been done in order to do the follow-ups. After specifying the search criteria, click on “Show” button. This will list all the students who match the search criteria. Then select the students from the list one by one to do the follow-ups.



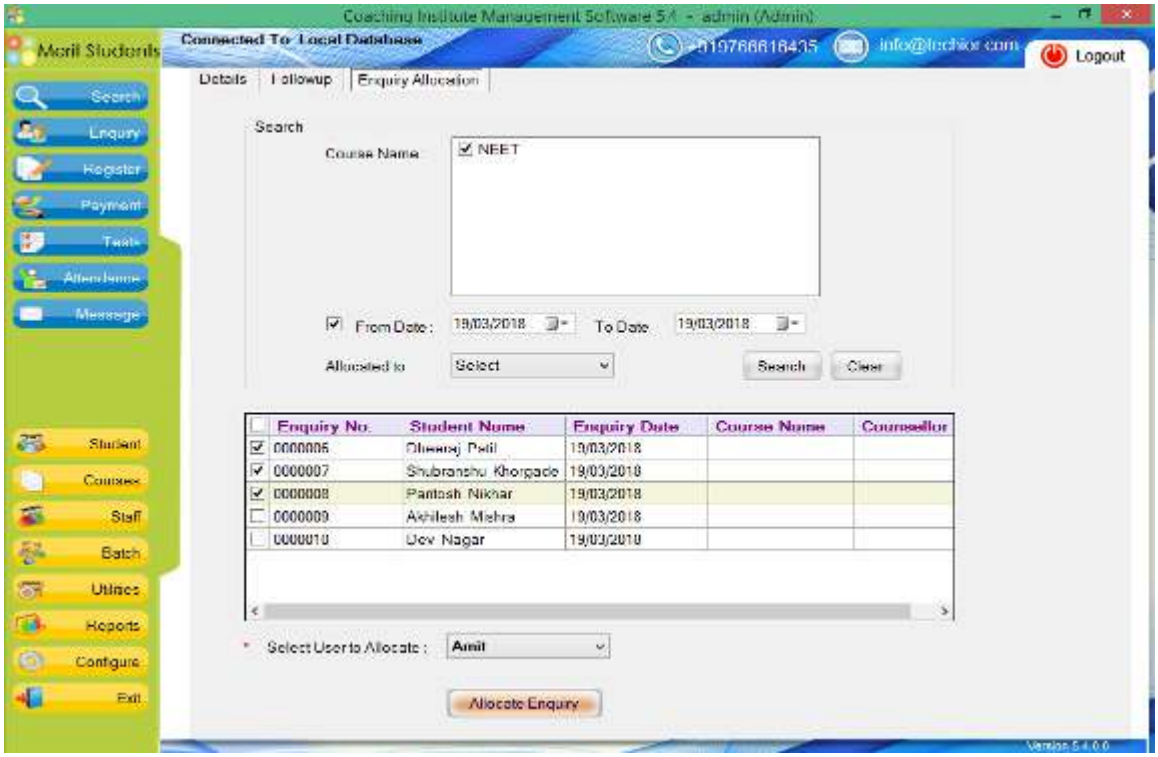
In the follow-up details, you can select a status of the call made. Some of the pre-defined call status are “Busy”, “Switched off”, “No response”, etc. You can define your own call status depending upon your need. There is a checkbox provided to indicate whether the student is interested in joining the courses or not. Also, there is a remarks field where any comments from the follow-up calls can be added. The information saved in this form during follow-up calls can be seen in the reports to track the progress of the follow-ups. See Reports Module section for details about the follow-up reports that are available.

Enquiry Allocation:

You can allocate enquires coming to your institutes to different counselors/ users. When admin allocate enquiry to a particular user ,that user will take follow up of enquires only those enquires whichever has been allocated to user.

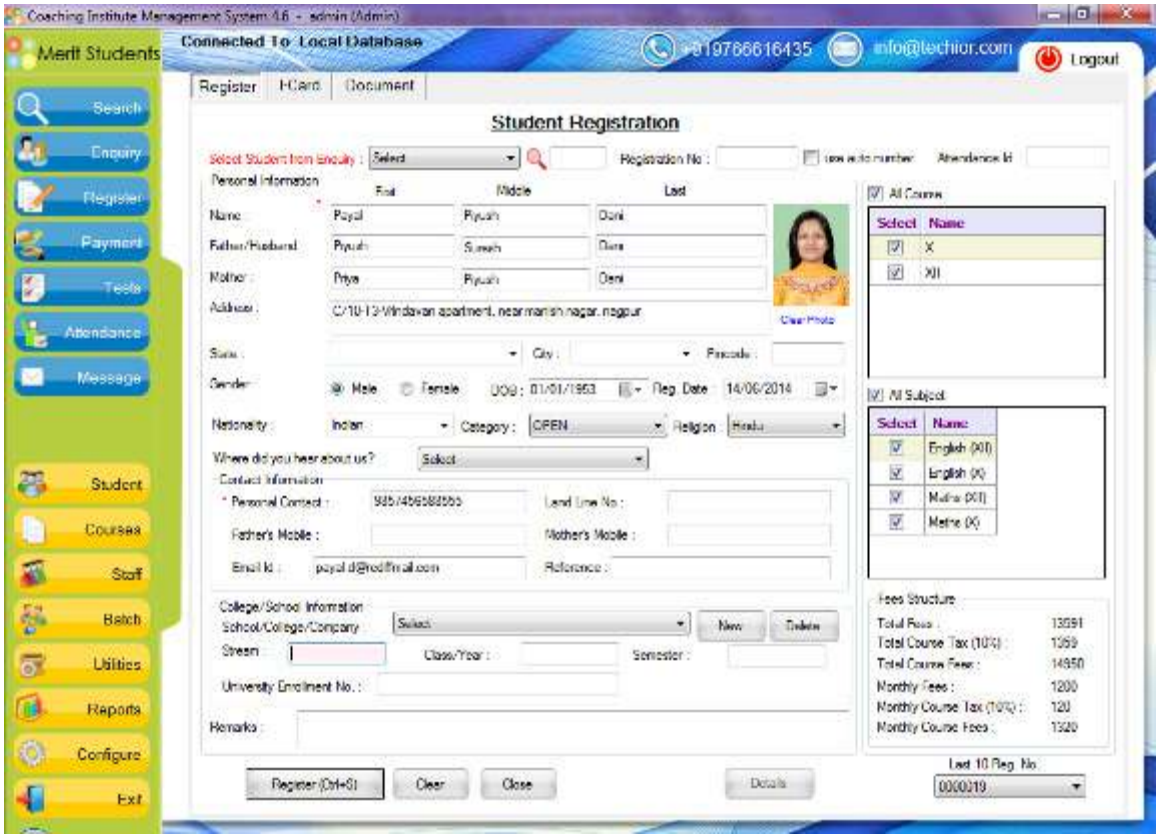
To allocate enquiry to user, create user and give user permission to access student enquiry module. Now from “Enquiry” menu go to “Enquiry Allocation” sub menu select the course or date range to search for enquiry the list of enquired student will appear. Now select the student using checkbox and select the user to allocate from drop down and click “Allocate Enquiry” enquires will get allocated to a particular user.

You can also search enquiries allocated to user. Select user from “Allocated to” dropdown and click search list of student will appear whose enquiry has been allocated to that user.

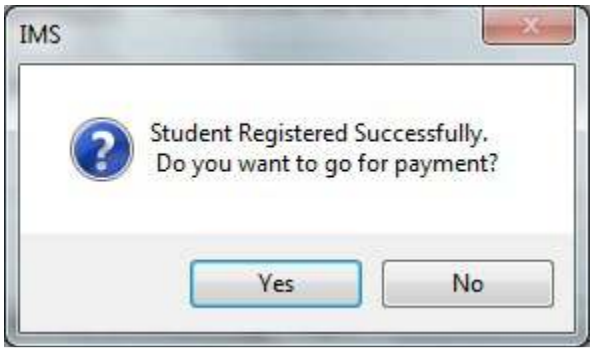


Register

This form is used to enroll a student for a particular course. You can either enter all the required details or choose a enquiry student from the drop-down list. Registration Number is auto-generated by default. Select the course(s) in which the student wants to register and click on "**Register**" to save the information.

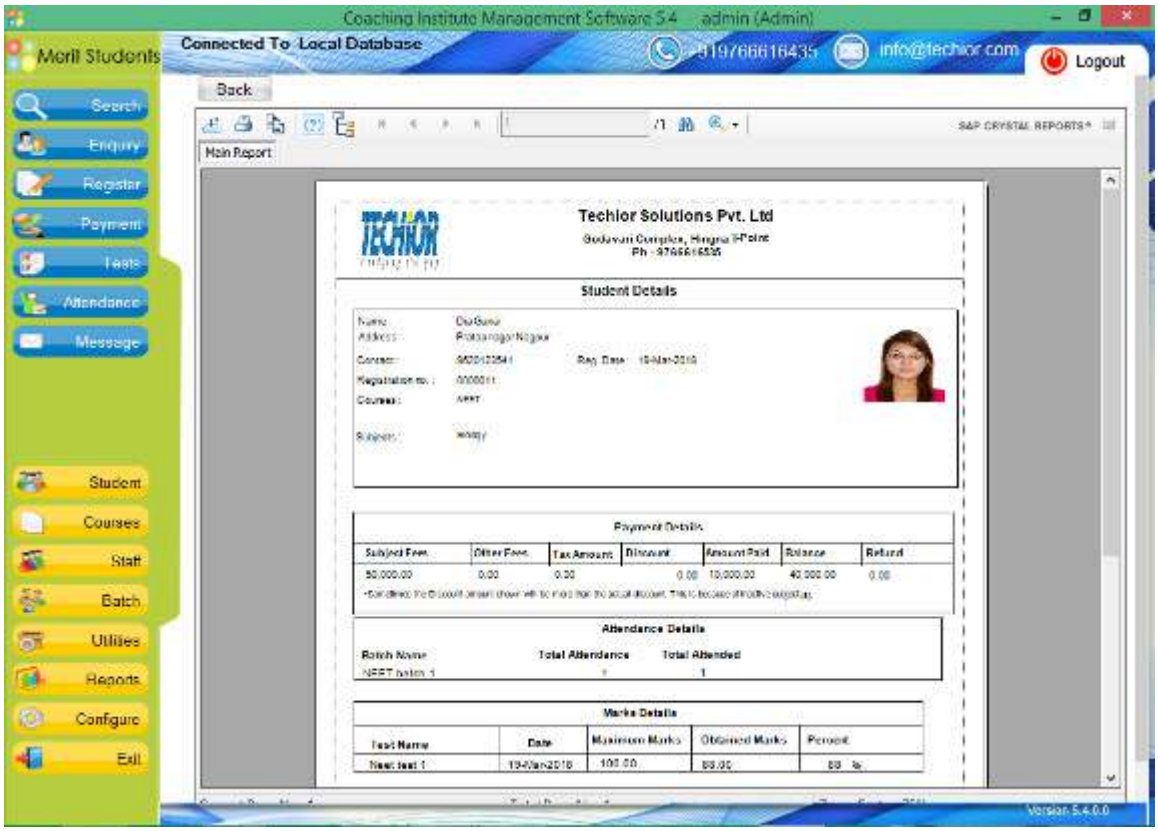


A confirmation window will pop-up as below when registration is successful:



Click “Yes” to go to “Payment” module to setup the installments, else click “No”.

You can get the student details from Details tab. Details about student’s payment, attendance, test & students basic information with photograph will be shown here.



I-Card

I-Cards can be prepared for registered students.
Choose the I-Card tab under Student -> Register.
Select the name of the student and Click “View”.
Here multiple I-cards can also be generated by selecting Batch or Course.
I-Card is created for the selected student, which can then be printed and laminated. I-card can be generated in horizontal or vertical manner.

Horizontal View:

Vertical View:

I card can be generated in two different ways.

(1) In standard size:- This type of I card contains the basic information of the student.
In horizontal manner :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Merit Students
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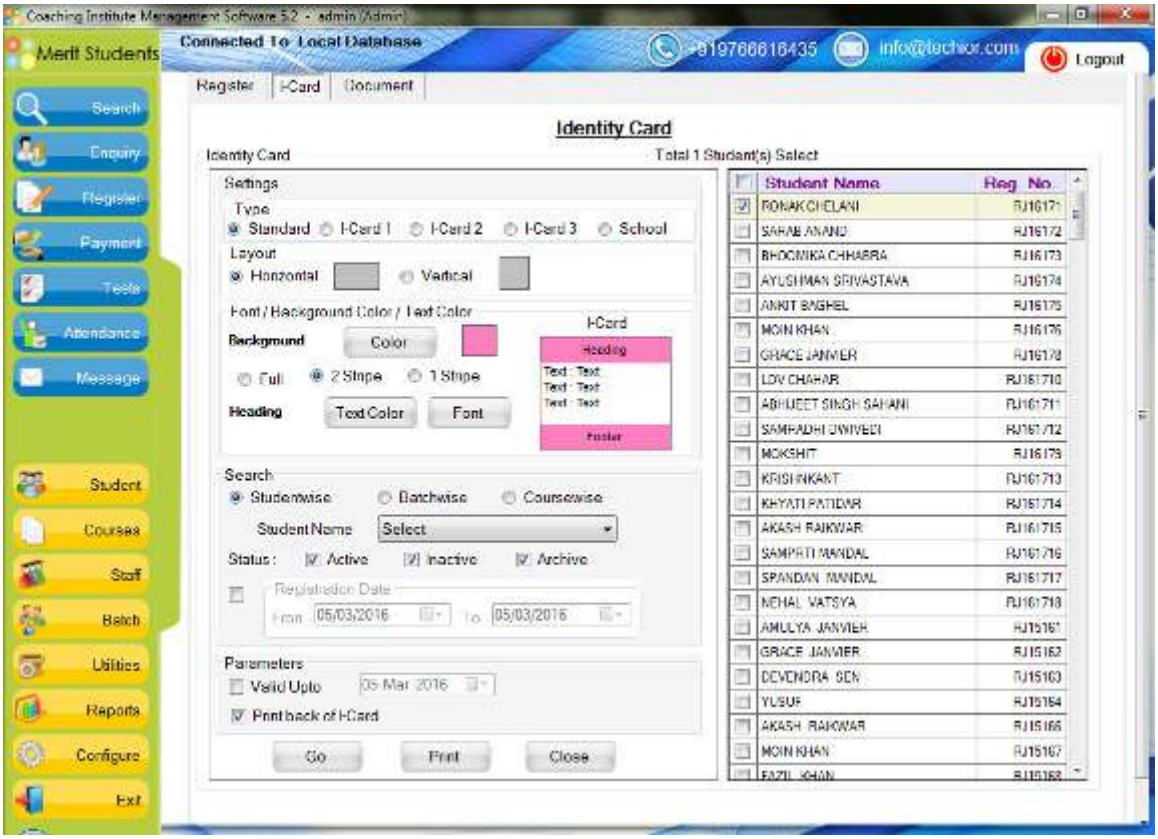
+919766616435
info@techior.com
Logout
Back
Search
Enquiry
Register
Payment
Tests
Attendance
Message
Student
Courses
Staff
Batch
Utilies
Reports
Configure
Exit
Main Report
Techior Solutions Pvt. Ltd
Name : KirtiNanda
DOB : 28-Feb-1991
Reg. No. : 0000002
Godavari Complex Hingna T-Point
Ph.-9766616535
Techior Solutions Pvt. Ltd
Name : Jivika Rai
DOB : 09-Dec-1999
Reg. No. : 0000003
Godavari Complex Hingna T-Point
Ph.-9766616535
Techior Solutions Pvt. Ltd
Name : Nitish Devgan
DOB : 01-Jan-2000
Reg. No. : 0000004
Godavari Complex Hingna T-Point
Ph.-9766616535
Techior Solutions Pvt. Ltd
Name : Aniket Mishra
DOB : 13-Feb-1990
Reg. No. : 0000005
Godavari Complex Hingna T-Point
Ph.-9766616535
Techior Solutions Pvt. Ltd
Name : Daisy Jackson
DOB : 28-Feb-1991
Techior Solutions Pvt. Ltd
Name : Ravi Shah
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 100%

In vertical manner:

Detailed I card: This type of I card contains the basic information of the student along with batch & course details.(horizontal manner)

In vertical manner:

I-card can be generated by selecting either of the option of background colour selection




Coaching Institute Management System 4.6 - admin (Admin)
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info@techior.com
Logout
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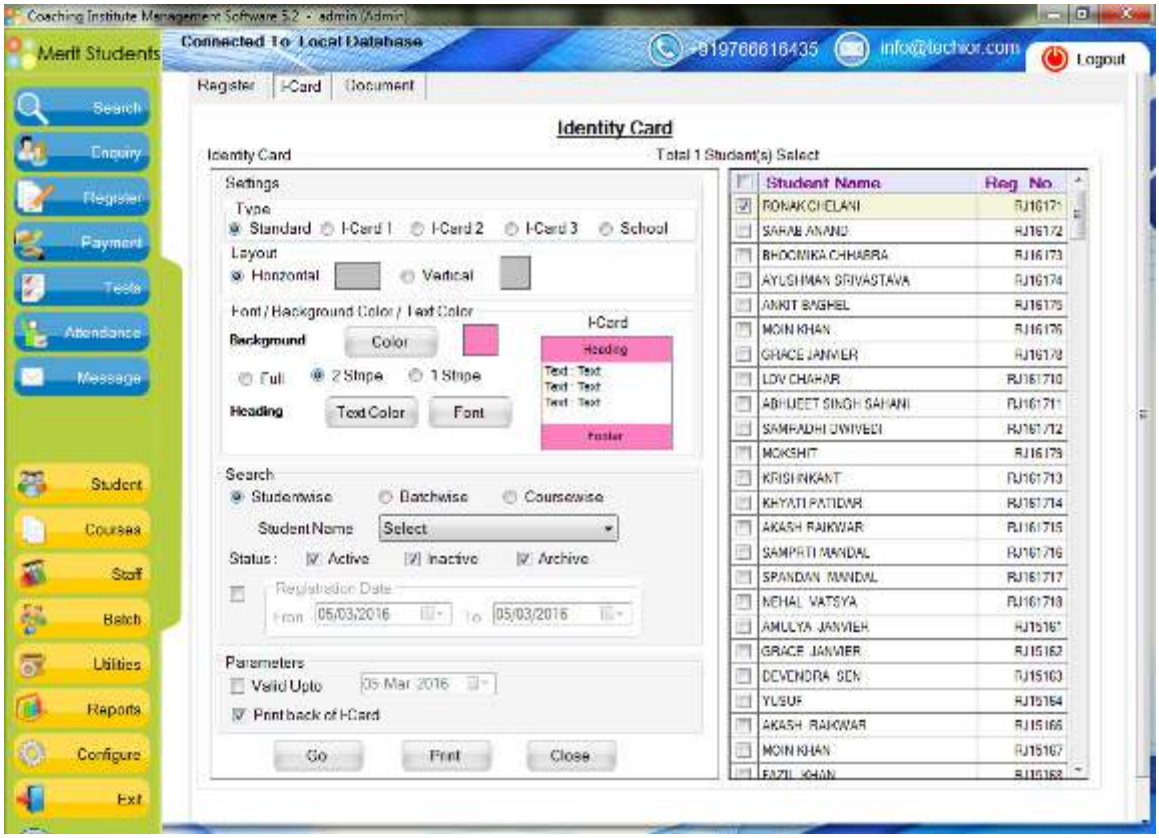
OR strip color selection.




Coaching Institute Management System 4.6 - admin (Admin)
Merit Students
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info@techior.com
Logout
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Search
Enquiry
Register
Payment
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Attendance
Message
Student
Courses
Staff
Batch
Utilities
Reports
Configure
Exit
Main Report
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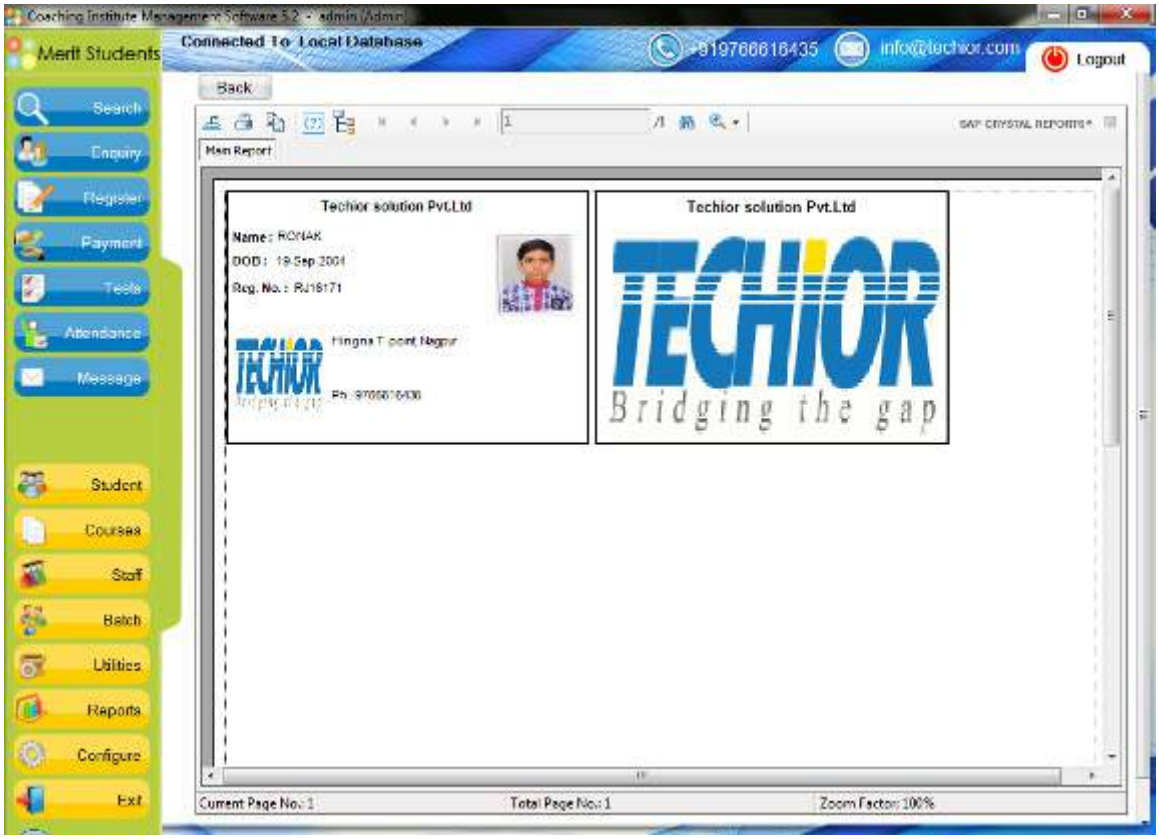
Zoom Factor: 100%

And in vertical manner it will looks as follows:

.

To print I card with back side image tick the option Print back of I-card & then select the names of the students & then click on Print .

Note: To print back side of I card, you need to upload back side image in Configuration>>> settings>> I-Card Setting.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+919766616435
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Search
Enquiry
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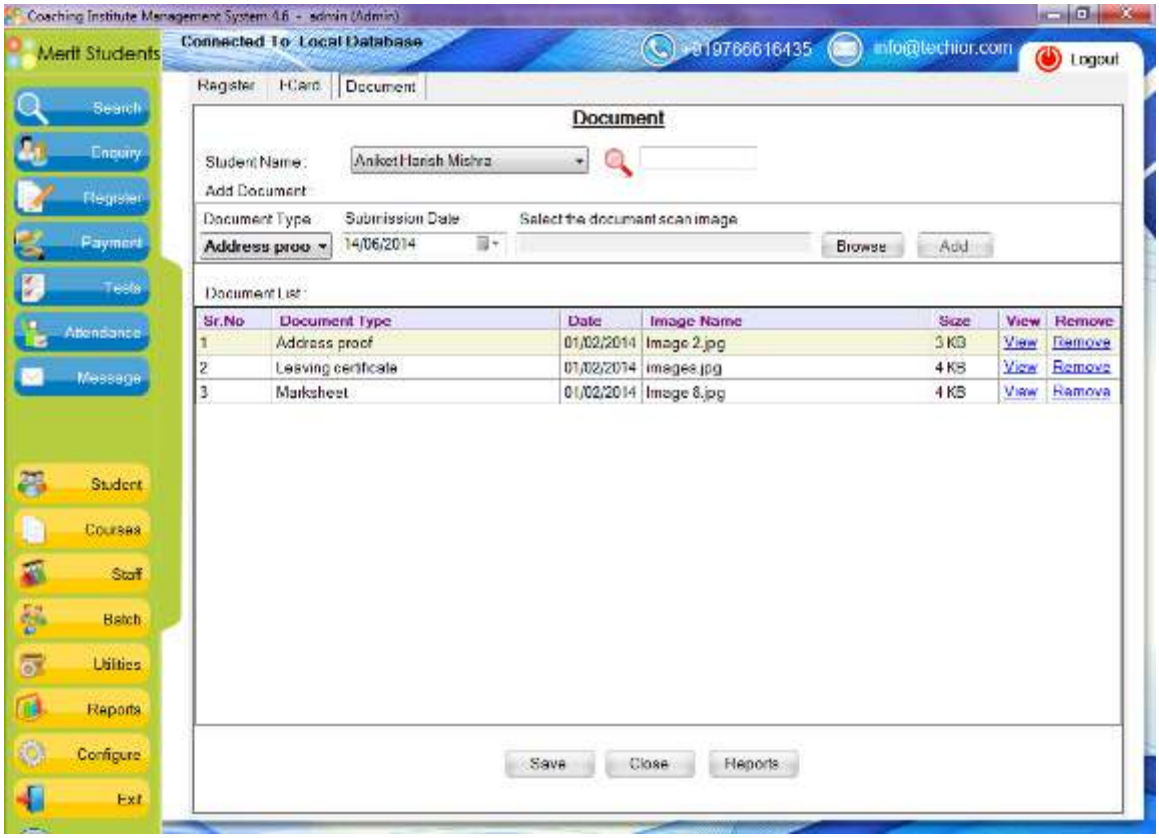
Payment
Tests
Attendance
Message
Student
Courses
Staff
Batch
Utilities
Reports
Configure
Exit
Main Report
Techior solution Pvt.Ltd
Name : RONAK
DOB : 19-Sep-2001
Reg. No. : RJ18171
Techior solution Pvt.Ltd
Bridging the gap
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 100%

Documents: Here the student can submit the scanned copies of different documents. Go to Register->document, select student name of whom documents to be saved ,Select the document type, date of submission & then browse the image & then click on add & then click on save.



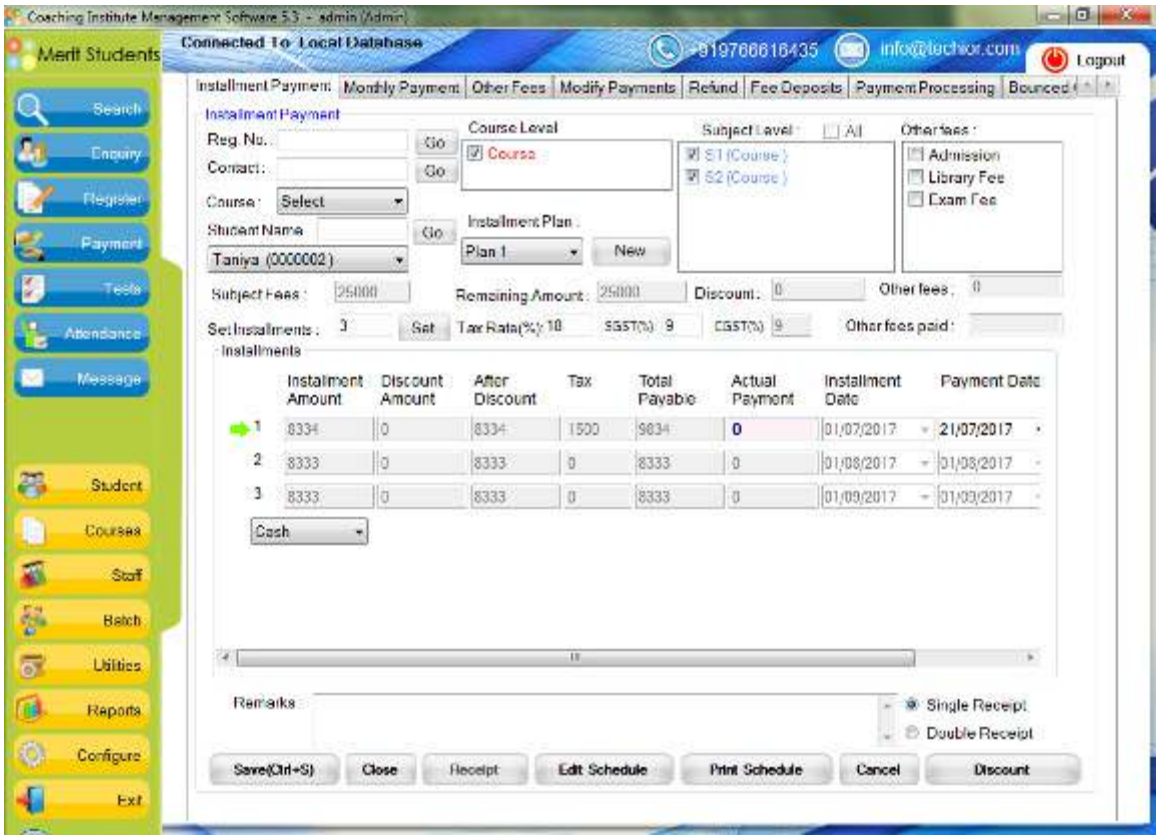
Payment

This module is used to keep track of the fees paid by a student. It also performs installment calculations. Just select the name of the student using the drop down menu, select the plan, select the course for which the payment is to be done, and the number of installments in which the payment will be done. Then whenever the student pays an installment, enter the amount paid and save the information. The tax /GST on the amount paid is calculated according to the tax/GSTrate set in the company configuration.

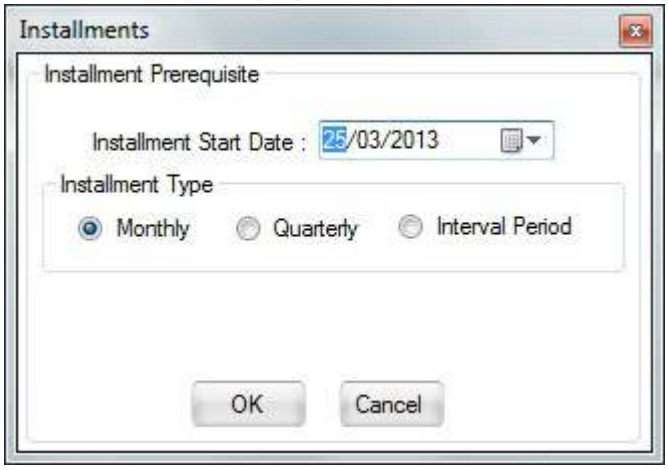
Payment can be done for multiple subjects or even multiple courses at a time. Simply select “Yes” under Multiple subject payment, and then select the subjects for which the payment is to be done.

Payment can be done by Cash, Cheque, DD or Card. If the student pays by cheque, then click on the “**By Cheque**” box. This allows you to enter the cheque number and the bank details for later reference. If the payment is done by cash, then simply enter the amount paid and save the information.

Installment Schedule (Payment) Window



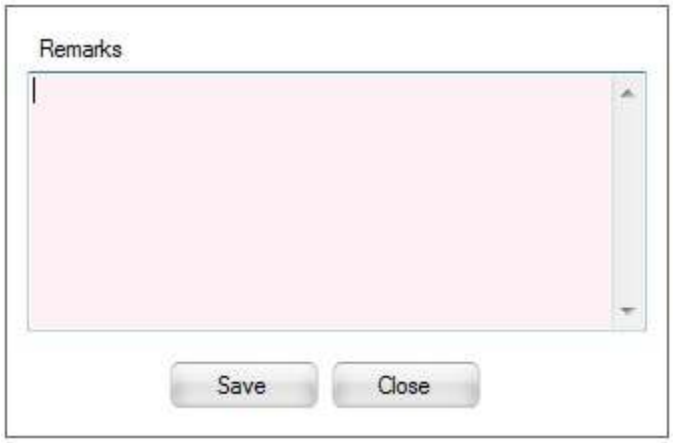
Choose a student name from the “Student Name” dropdown list. If Course level fees installment needs to be created, and then click radio button in front of Course & if subject level fees installment needs to be created then click radio button in front of Subject. Below pop-up box will open:



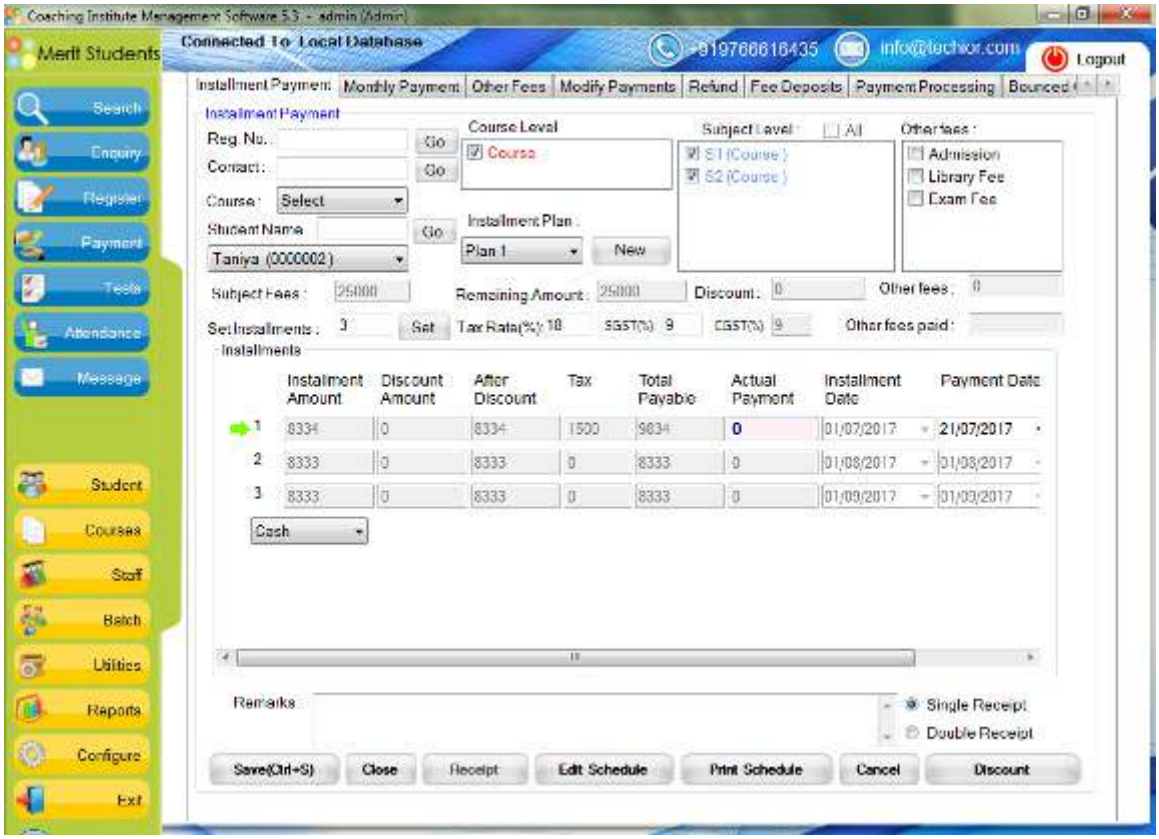
Choose the "**Installment Start Date**" and "**Installment Type**" as "**Monthly**" or "**Quarterly**" or "**Interval Period**" and click "**OK**". Once installments are created, click on "Save" to save the installment setup for the student.

Click on "Edit Schedule" to change the Installment Amount or Installment Date or both. Once done, click "Save Schedule".

Click on "Remarks" to open the window to enter some remarks. Once done, click on "Save".



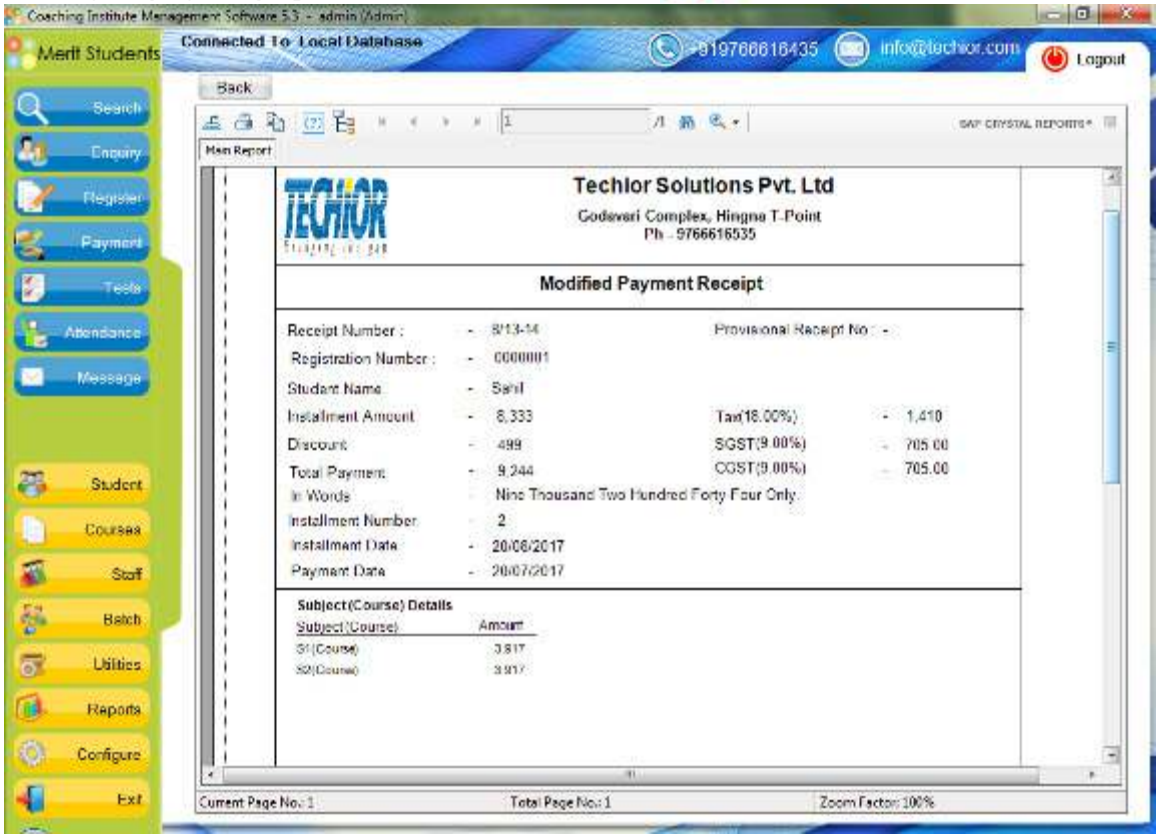
If installment template is defined for a course or subject then select student name from drop down & then select plan name, installment associated with that course or subject will get loaded on payment form.



Printing a receipt:

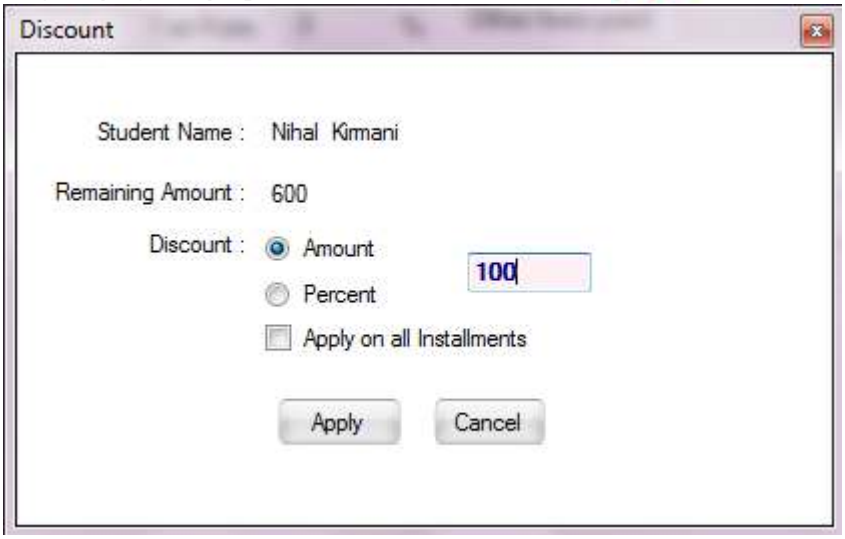
To print a receipt for the payment, click on the "**Receipt**" button at the bottom of the form. You can choose to print a single receipt or a double receipt. If you choose double receipt, it will create 2 copies of the same receipt which can be printed on a single page. This is useful for you to keep a record (copy) of the receipts that have been issued.

Payment Receipt



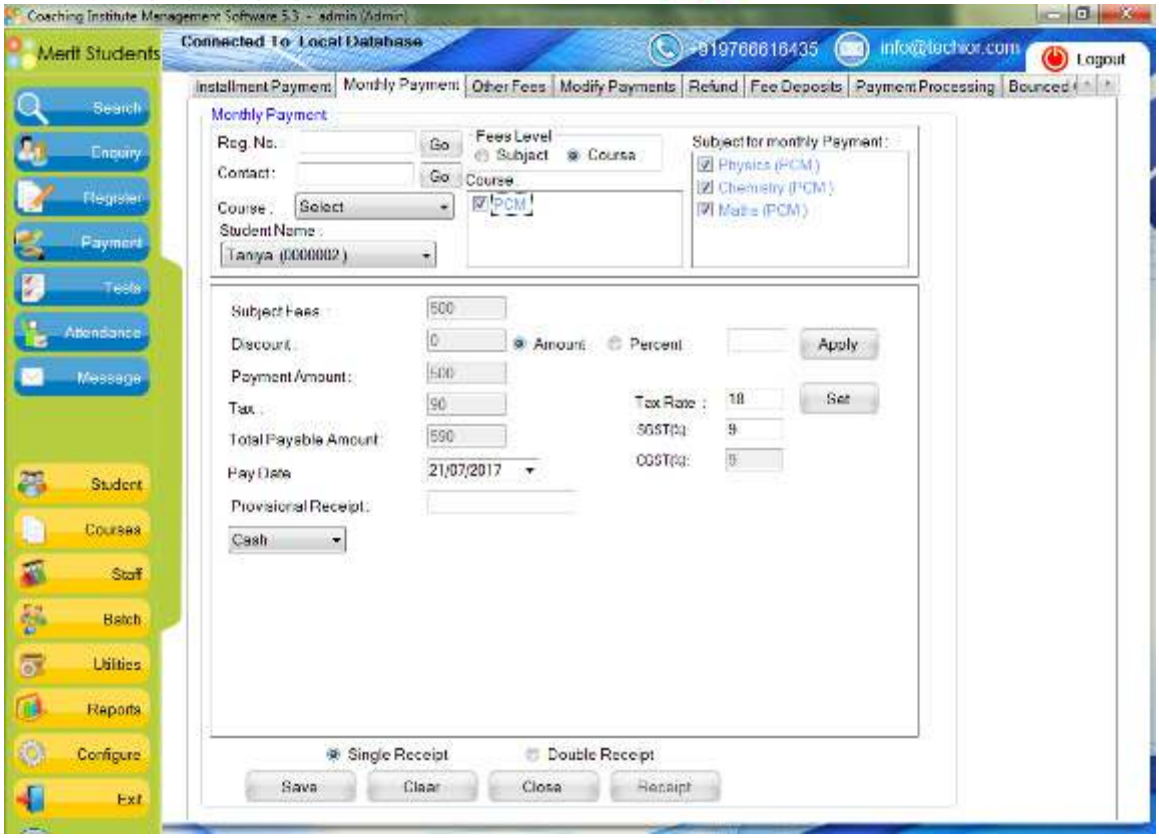
Giving Discount

When an installment payment is being done, a student can be given Discount. The discount can be either a fixed amount or a percentage of the fees. To give discount to a student, click in the “Discount” button at the bottom of the payment form. Then enter the amount or the percentage discount to be given and click on “Apply”. This feature can be used when you have any promotional offers on the courses offered.

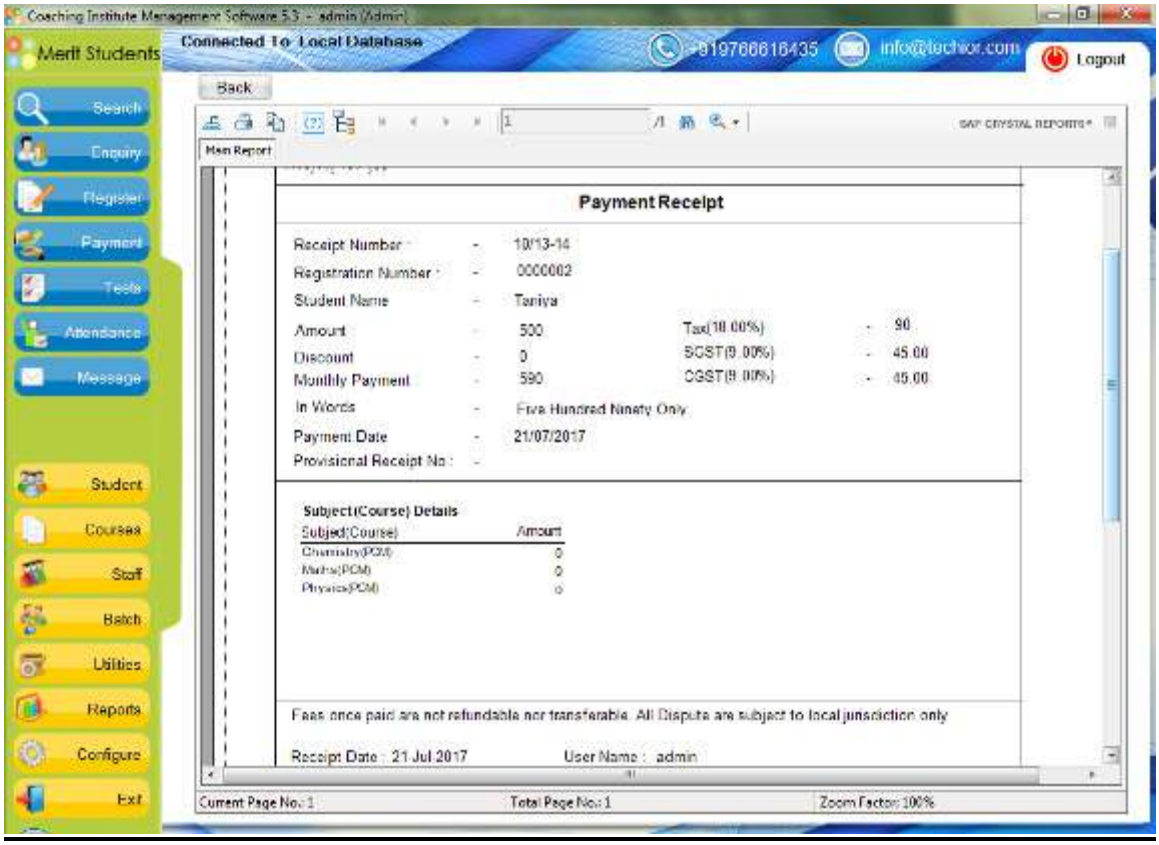


Monthly Payments

Subject fees can be taken in a lump-sum amount from the student. Click on "**Monthly Payment**" tab. Then choose the student from student drop-down, choose the subject(s), Enter "**Discount**" (optional) either in amount or in percentage, Enter "**Tax/GST**" (optional) either in amount or in percentage, choose the "**Pay Date**", Enter "**Provisional Receipt**" Number if required, choose payment options from dropdown by which payment is received in like Cash, Cheque, DD or Card and click on "**Save**".

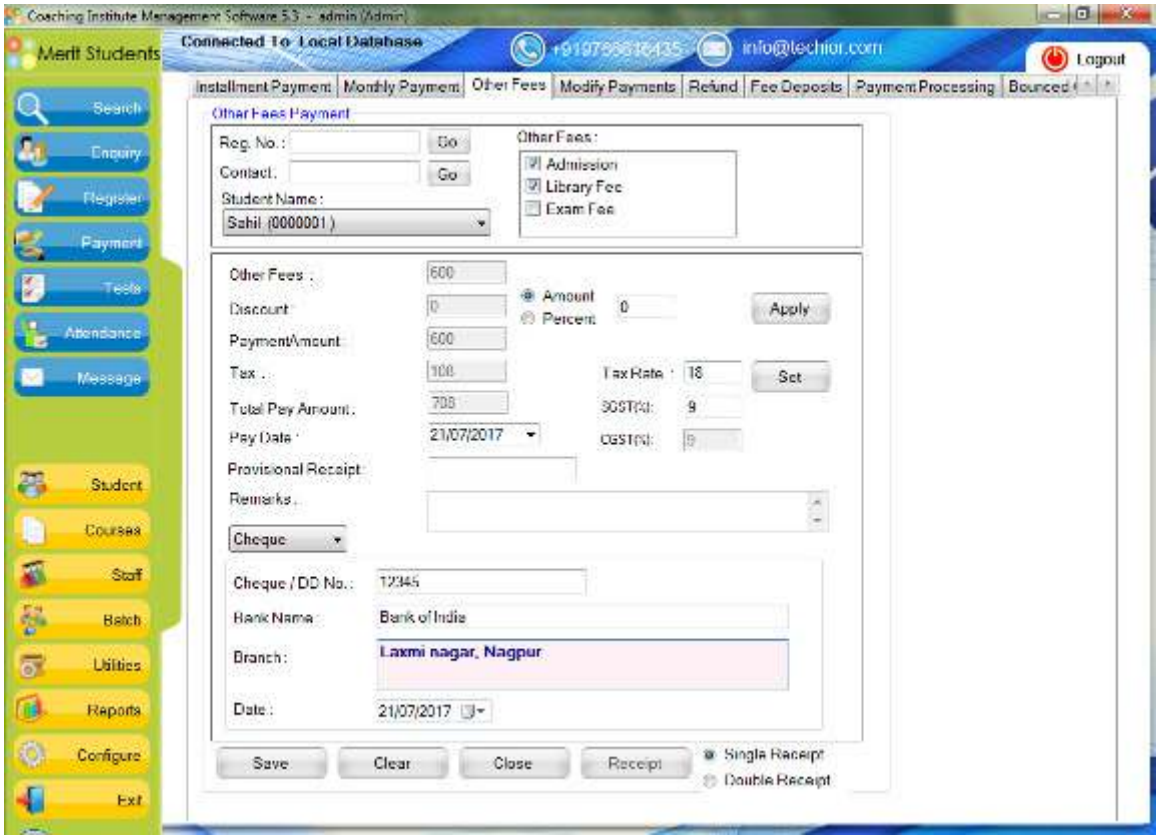

Coaching Institute Management Software 5.3 - admin (Admin)
Merit Students
Connected To Local Database
+919766616435
info@techior.com
Logout
Search
Enquiry
Register
Payment
Tests
Attendance
Message
Student
Courses
Staff
Batch
Utilities
Reports
Configure
Exit
Installment Payment
Monthly Payment
Other Fees
Modify Payments
Refund
Fee Deposits
Payment Processing
Bounced
Monthly Payment
Reg. No.
Go
Contact:
Go
Course :
Select
Student Name :
Tanya (0000002)
Fees Level
Subject
Course
Course
PCM
Subject for monthly Payment :
Physics (PCM)
Chemistry (PCM)
Maths (PCM)
Subject Fees
500
Discount
0
Amount
Percent
Apply
Payment Amount :
500
Tax :
90
Tax Rate :
18
Set
SGST(%)
9
CGST(%)
9
Total Payable Amount
590
Pay Date
21/07/2017
Provisional Receipt :
Cash
Single Receipt
Double Receipt
Save
Clear
Close
Receipt

Monthly Payment Receipt:



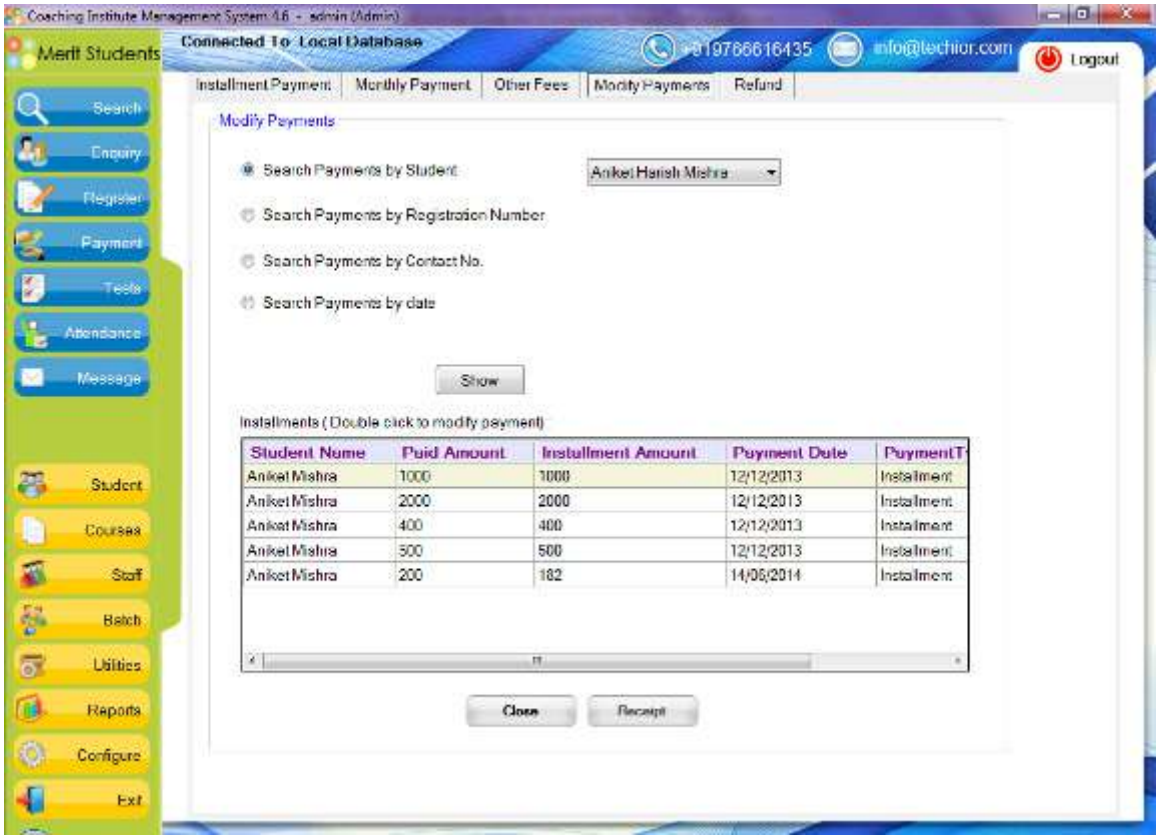
Other Fees Payment

Here the student can pay other fees. Select the Other Fees tab. Here student can be selected by entering registration number or by selecting the student from the dropdown. Select the type of other fees to be paid by ticking the checkboxes. If tax/GST rate is to be fixed or changed, can fix it or change it. If discount is given to the student on other fees then enter it in terms of Amount or percentage. Select the payment options from dropdown like Cash, Cheque, Card or DD.
If the other fees to be paid by cheque, tick on checkbox of By Cheque, fill all the details & click on save.
The receipt can also be generated by clicking on Receipt button.

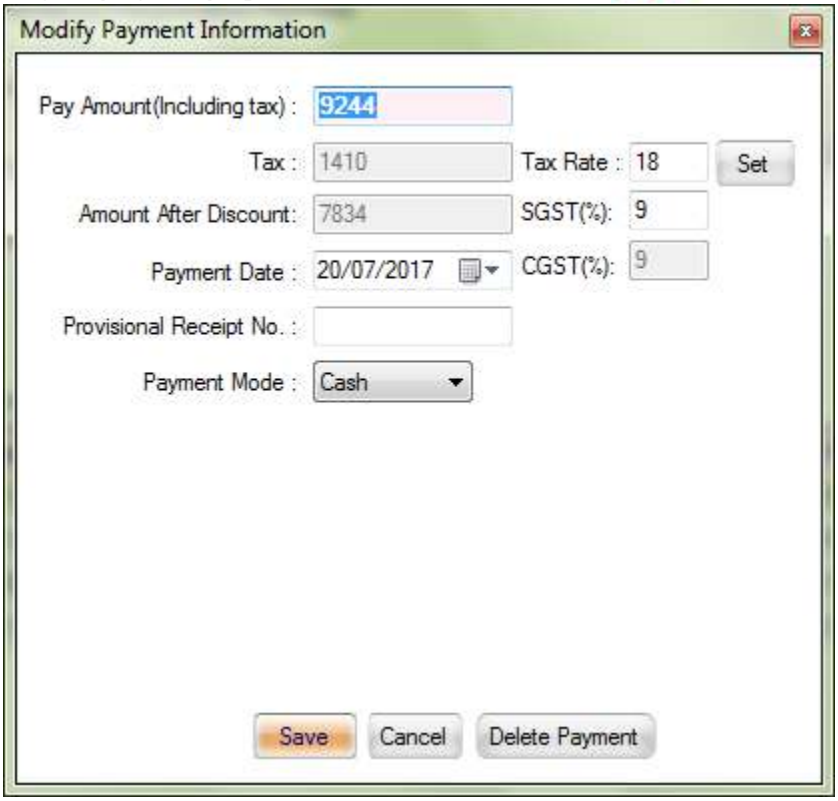


Modifying the paid installment amount:

The installment payments which have been saved can also be modified. Click on “Modify Payments” tab. Select the student whose payment has to be modified or the date for which the payment has to be modified and click on “Show” button to show all the payments for the selection made.

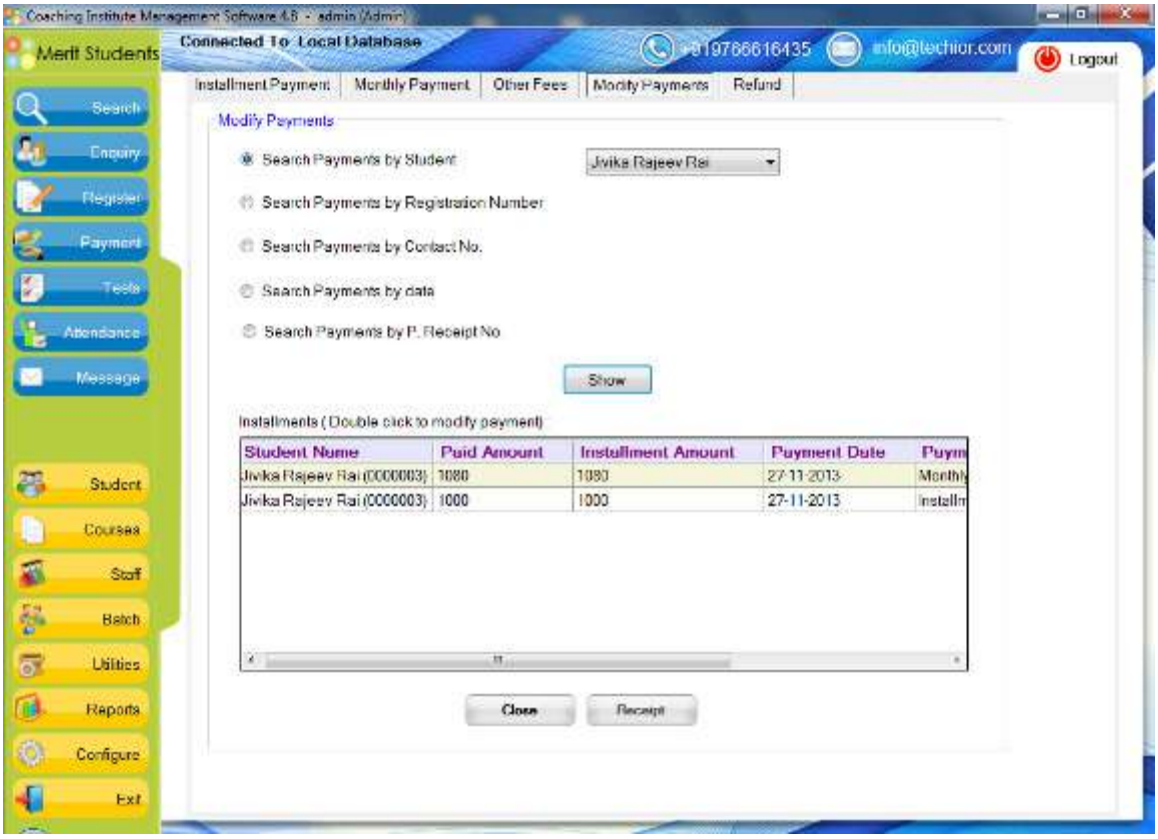


Then double-click on the payment which is to be modified to open the below window and change the amount, pay date as required.


Modify Payment Information
Pay Amount(Including tax) :
9244
Tax :
1410
Tax Rate :
18
Set
Amount After Discount:
7834
SGST(%):
9
Payment Date :
20/07/2017
CGST(%):
9
Provisional Receipt No. :
Payment Mode :
Cash
Save
Cancel
Delete Payment

Modifying the paid monthly amount:

The monthly payments which have been saved can also be modified. Click on “Modify Payments” tab. Select the student whose payment has to be modified or the date for which the payment has to be modified and click on “Show” button to show all the payments for the selection made.



Then double-click on the payment which is to be modified to open the below window and change the amount, pay date as required

Modify Monthly Payment

Student Name : **Jivika Raieev Rai (0000003)**

Receipt No. : **7/13-14**

Subject Fees : 1200

Discount : 120 — Amount / Percent — 120

Payment Amount : 1080

Tax : 0 — Tax Rate : 0

Total Pay Amount : 1080

Pay Date 27/11/2013

Provisional Receipt :

☑ By Cheque

Cheque Number :

Bank Name :

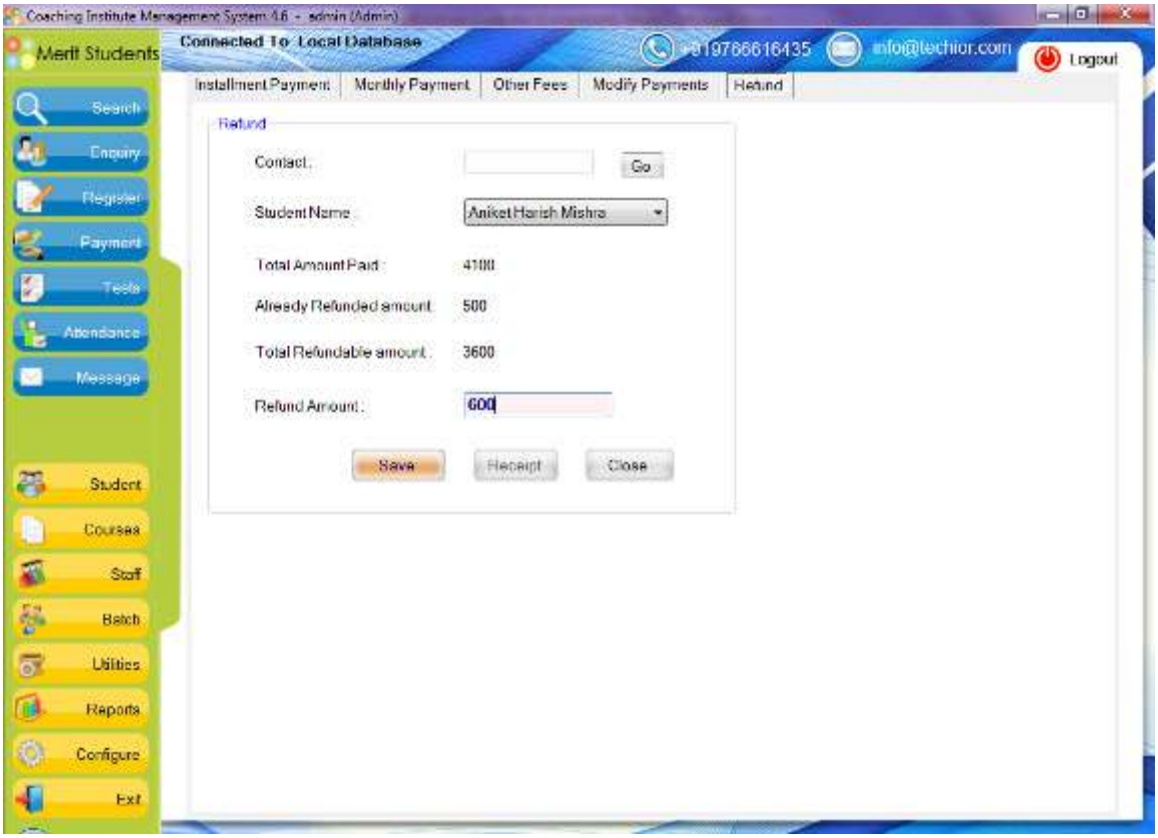
Branch :

Date : 26/12/2014

Save | Clear | Close

Giving Refund:

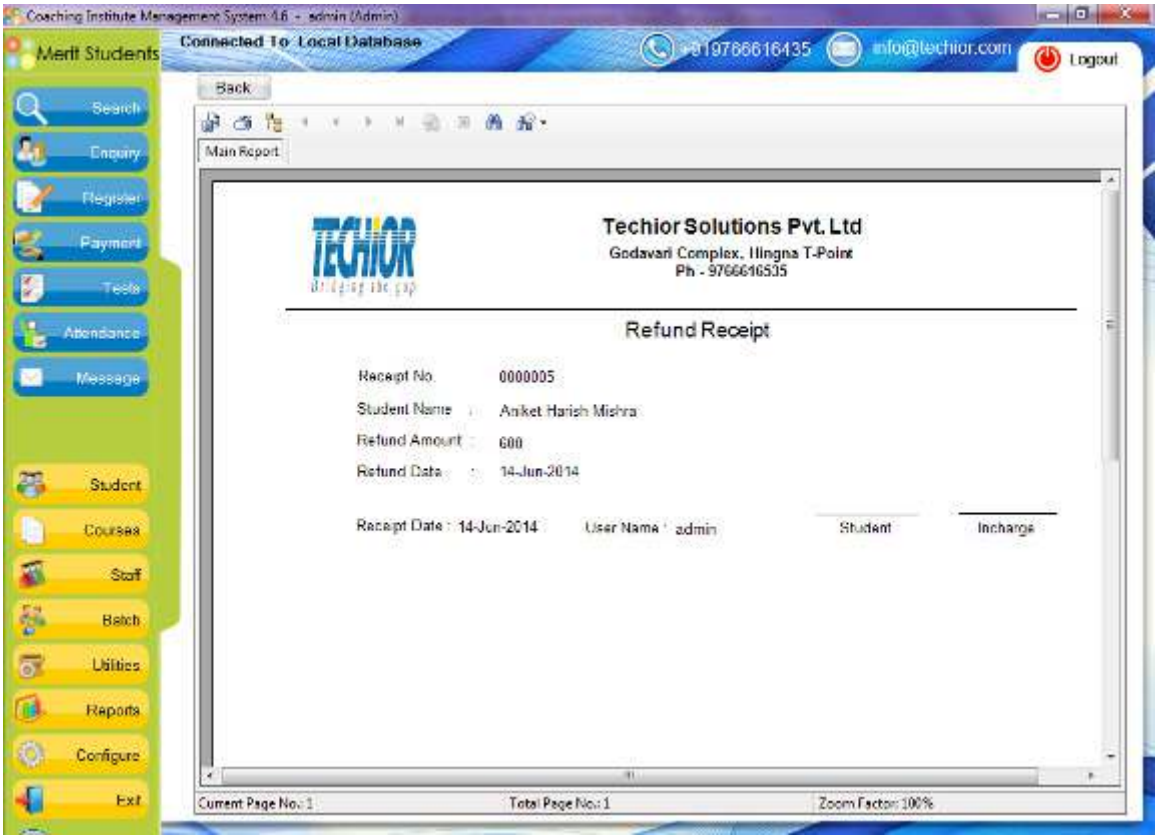
The payment module also allows refunds to be made to the students. Click on Refund tab, select the student name, enter the amount to be refunded and click “Save”.



Once refund is saved, below pop-up message will be displayed:

Refund Receipt:

Once refund is done, click on "**Receipt**" to generate the refund receipt.



Fees Deposit:

Select fees amount & then select the bank in which the amount is to be deposited.

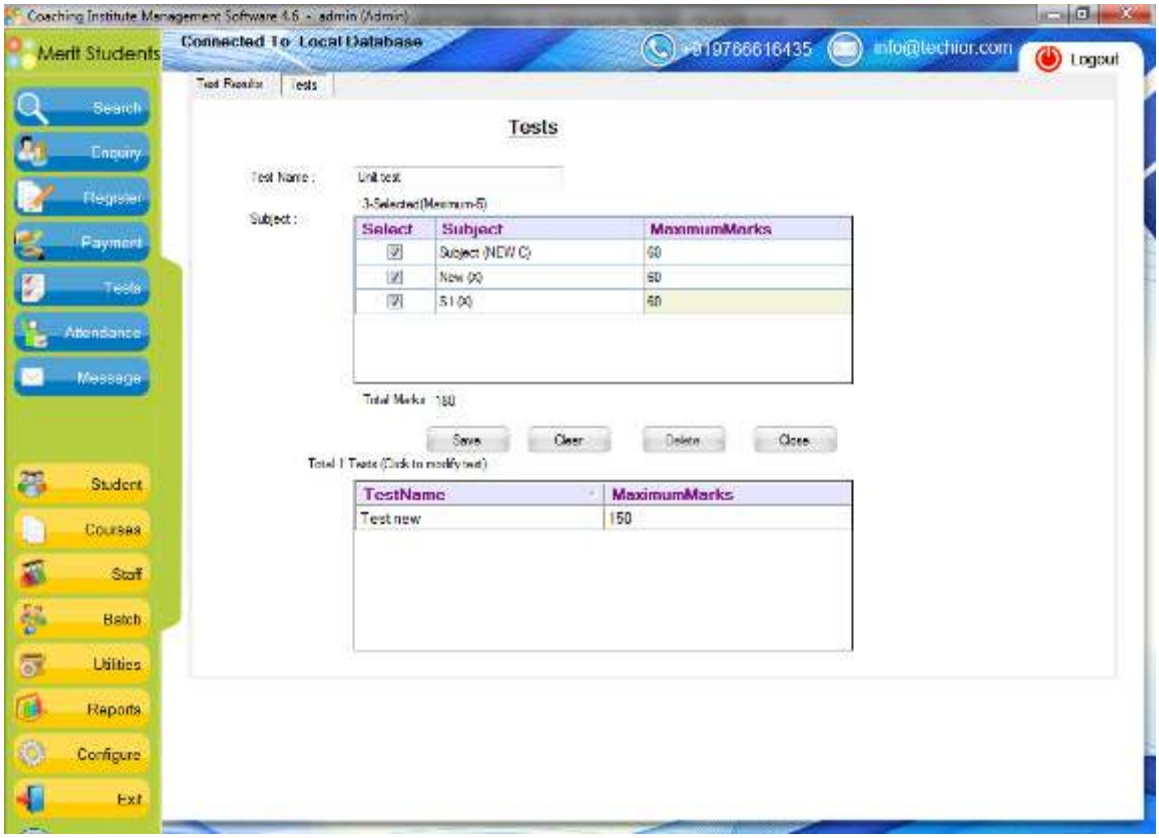
Payment Processing:

Double click on student name in order to deposit individual student fees. Then click on update.

Bounced cheque: Here you can add comment for bounced cheques

Tests:

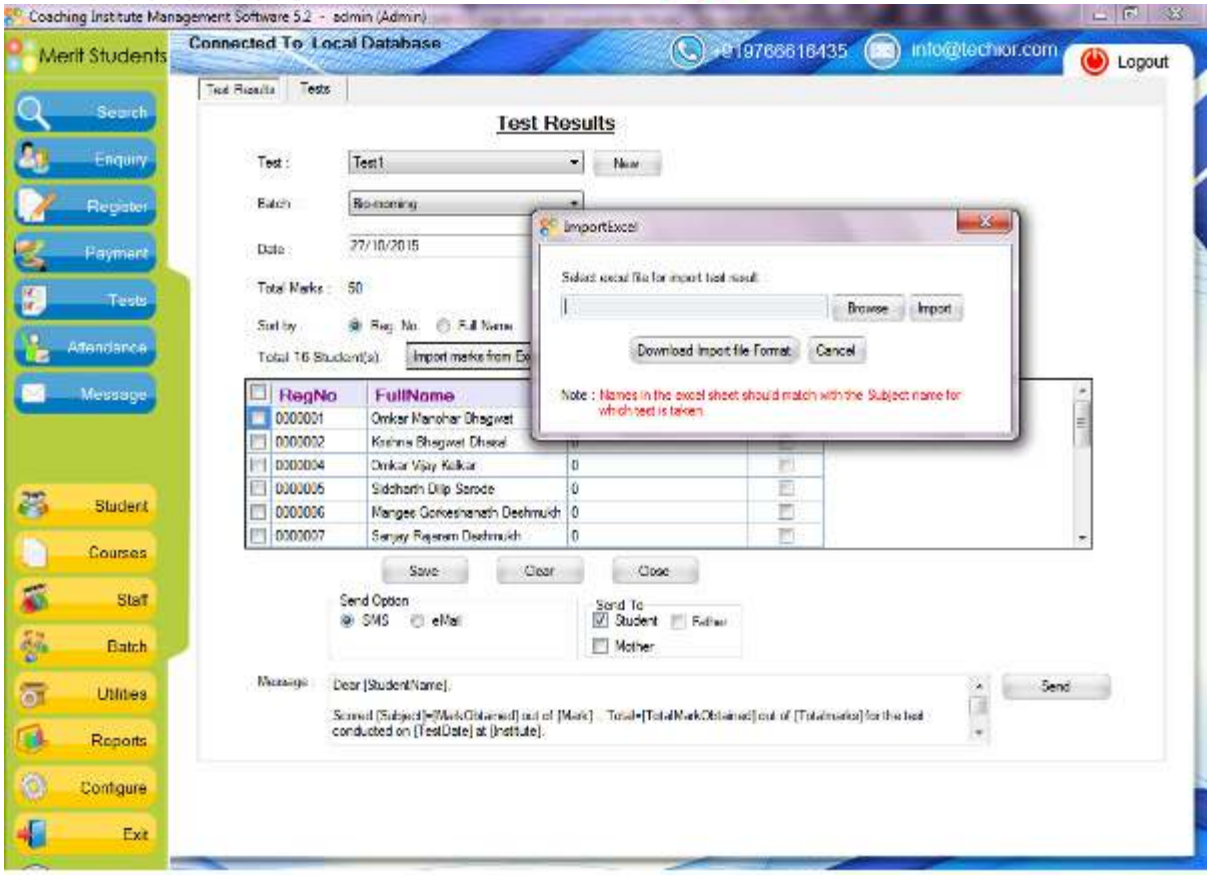
This tab is used to create the test for single subject or for multiple subjects. While creating the test, enter the test name, select the subject(s) for which test is to be created, enter the maximum marks for the test & then click on save.



Test result:

For entering the marks obtained by the students of a particular batch in a test go to test result, Select the test & batch from dropdown. It comes up with the list of students in the batch. Then enter the marks obtained by each student in that particular test using this form. If a student in the batch was absent on the day of the test, then tick the “Absent” checkbox next to the marks column for that student. This data is used for analyzing the progress of the students and the batch as a whole.

Data available in the Test Results grid can also be sorted as per “Reg. No.” or “Full Name”.
Test result can also be imported, select test name, batch name & then click on import marks from excel. Download the excel sheet format, then fill the registration number along with marks obtained & then upload the same file & then click on Save to save the test result.
You can also send SMS or E-Mail to the students informing them about their marks in the test from this form itself. Just select SMS or E-Mail option and type in the message to be sent. By default, a message announcing the marks scored has been provided.

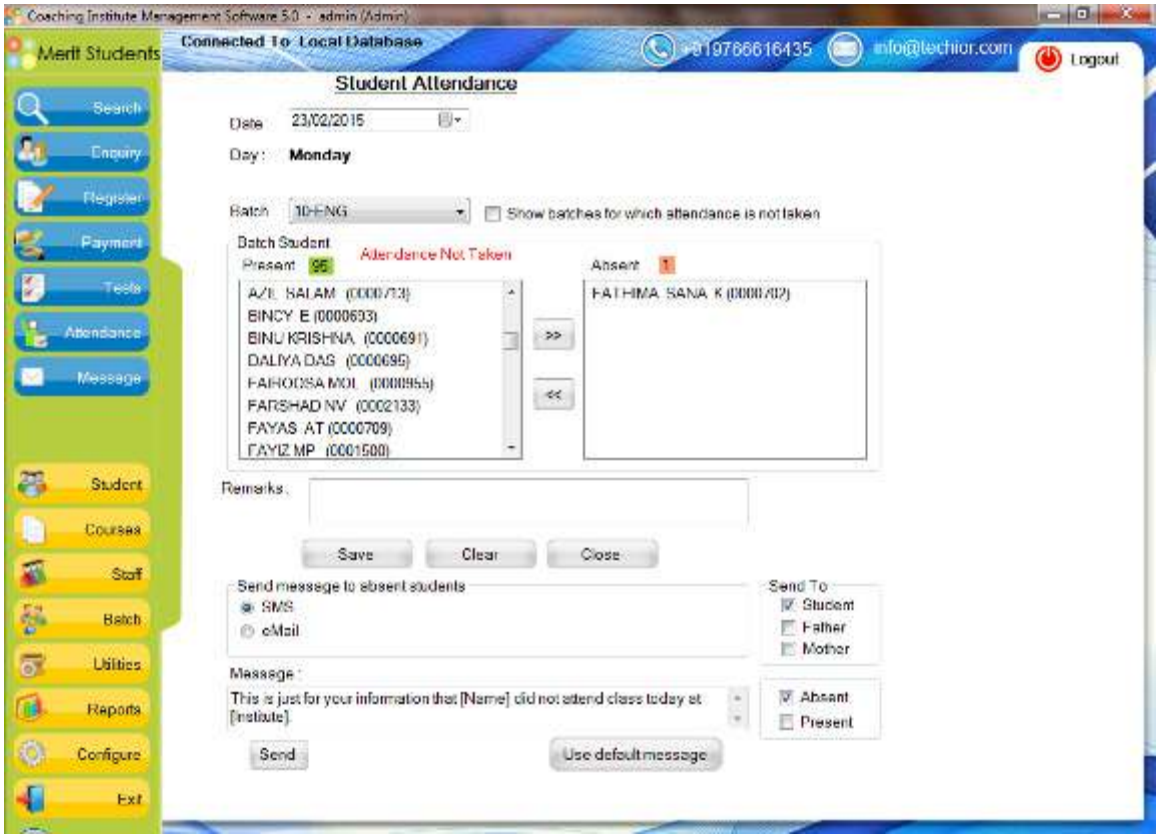


Attendance

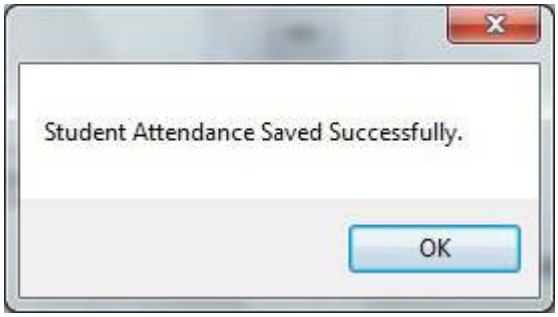
This module helps to Keep track of student attendance for a particular batch. Select the batch and the date for which the attendance has to be taken. It comes up with the list of students in the selected batch. By default, all the students are placed in the “present” category. Select the students who are absent and click the arrow (**>>**) button to move the selected students into the “absent” category. Finally, click the “**Save**” button to save the attendance for that date. To filter the batches for which attendance has not been taken for the selected date, choose the checkbox “**Show batches for which attendance is not taken**”.

You can also send SMS or eMail to the students and/or parents informing them about their presenty / absenteeism from this form itself. Just select SMS or eMail option, and type in the message to be sent. By default, a message has been provided which is just an informative message about the attended/ missed class.

You can choose to send the message to the student, the mother and/or the father of the student. Select the option for sending message whether to send message to Absent students or present student or to both category.



Below pop-up message will be displayed when attendance is saved successfully:



Note: The messages sent from this form are sent only to the parents or the students who are absent as well as for the students who are present.

Taking attendance using the Finger Print Device:
You can also take attendance using the Finger Print Device. Just enter the date and batch for which the attendance is to be taken and click on "From Device" button. The students who have not marked their attendance on the device will automatically be put into the absent category.

Note: The registration number of the students entered while registering the students in CIMS must match the id number given on the device.

Message

This is used to send messages to make an announcement to a selected group of students.

You can choose to send SMS or an E-Mail. In the "Send To" box you can choose the group of students to which the message has to be sent. You can also choose to send messages to the students alone and/or to the mother/father of the students.

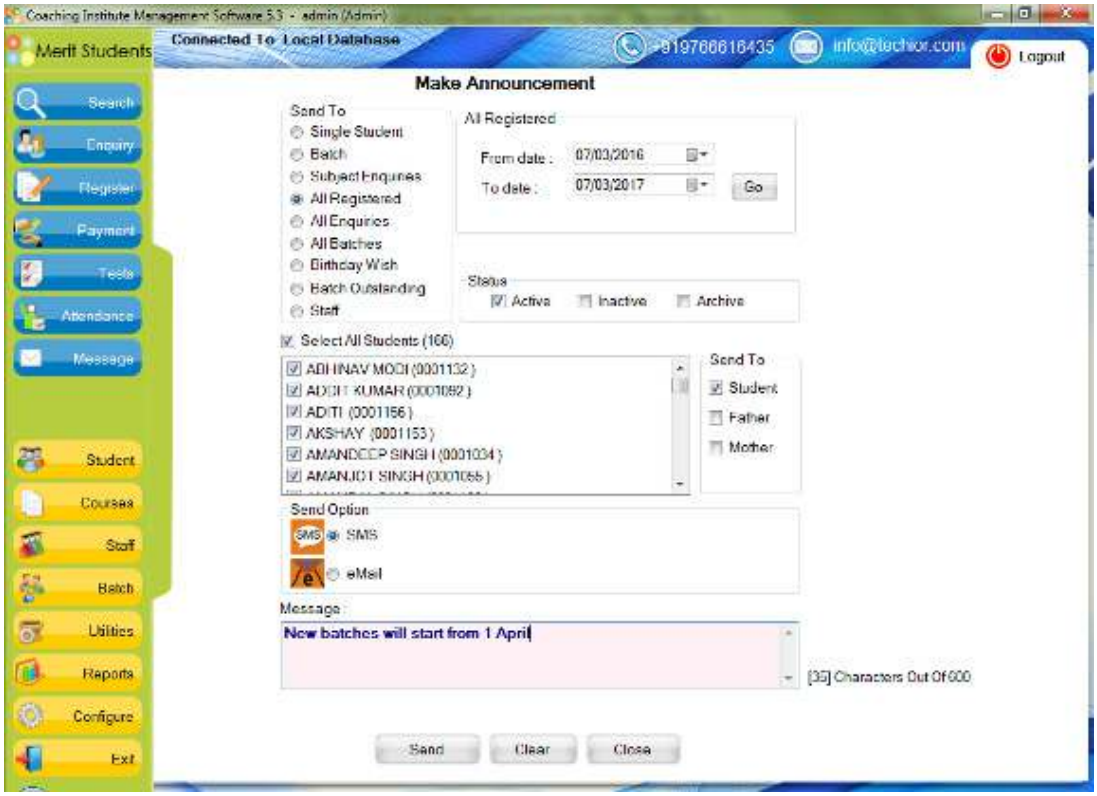
Messages can be sent to:

- **A single student.** Use "Search by name" to find the particular student.
- **A Batch.** Select the Batch name and send messages to all or selected students of the batch.
- **Subject Enquiries.** Select a particular course, subject and time span ("From date" and "To date") and click on "Go" button. This will give the list of students who have enquired for the selected course within the selected time frame, but not registered yet. You can then send announcements about the beginning of a new batch or discount offers, etc. to all or selected students from the list.
- **All registered.** Select a "From date" and a "To date". This option gives you a list of all the students who have registered in your institute in the selected time frame. This can be used to make announcements like institute holidays, or change in working hours, etc. to all or selected students from the list.
- **All enquiries.** This option gives a list of all the students who have enquired at your institute within a selected time frame but

registered yet. This option can be used to make discount offer announcements, etc.

- **All batches.** This option gives a list of all the students who are currently registered at your institute and are a part of one or multiple batches.
- **Birthday wish.** This option is used to list the students whose birthday is the current system date. It can be used to send birthday greetings to the students who are enrolled in the institute.
- **Staff.** This option is used to send the message to staff.

Once you have selected the list of students to whom you want to send the message, select the option SMS or E-Mail, type in the message and click on "Send" to send the message.



Courses Module

This module keeps track of the courses and subjects offered by the institute along with the fees and duration of each subject. It allows you to add/modify course and subject information.

Fees can be defined at course level (combined fee for all subjects in that course) or at subject level.

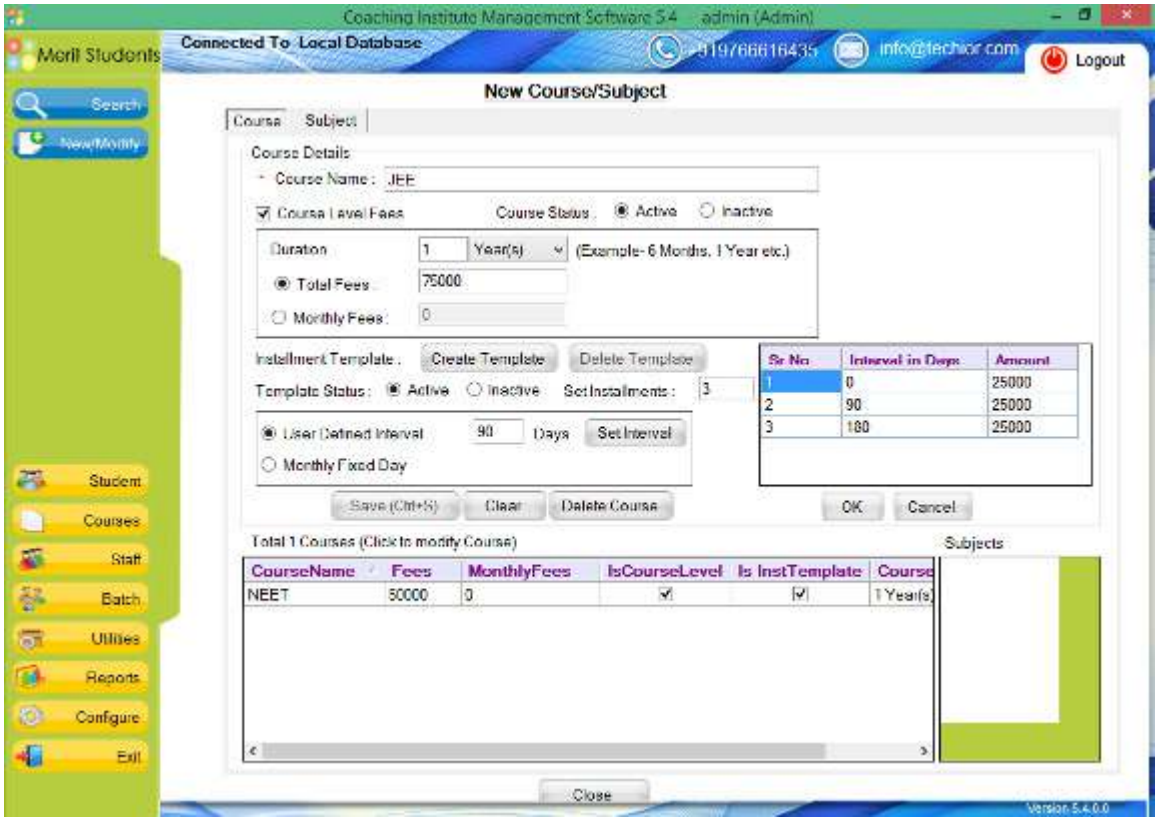
You can make course active or inactive by clicking on radio buttons beside them. It is useful if duration of course is over you can then mark that course as inactive course.

Add a course with course level fees:

First select the course tab, click on "**New**/**Modify**" and add the names of the courses that are offered at your institute.

Here Course fees can be defined as course level fees. Tick the "Course Level Fees" checkbox & you can define the fees either as Total fees or Monthly fees. After defining course level fees, add subjects under the course. Note that you will not define the fees at the subject level. At the time of registration, when the student registers for a course, all subjects belonging to the selected course are automatically selected. So the student automatically gets registered for all the subjects belonging to the selected course.

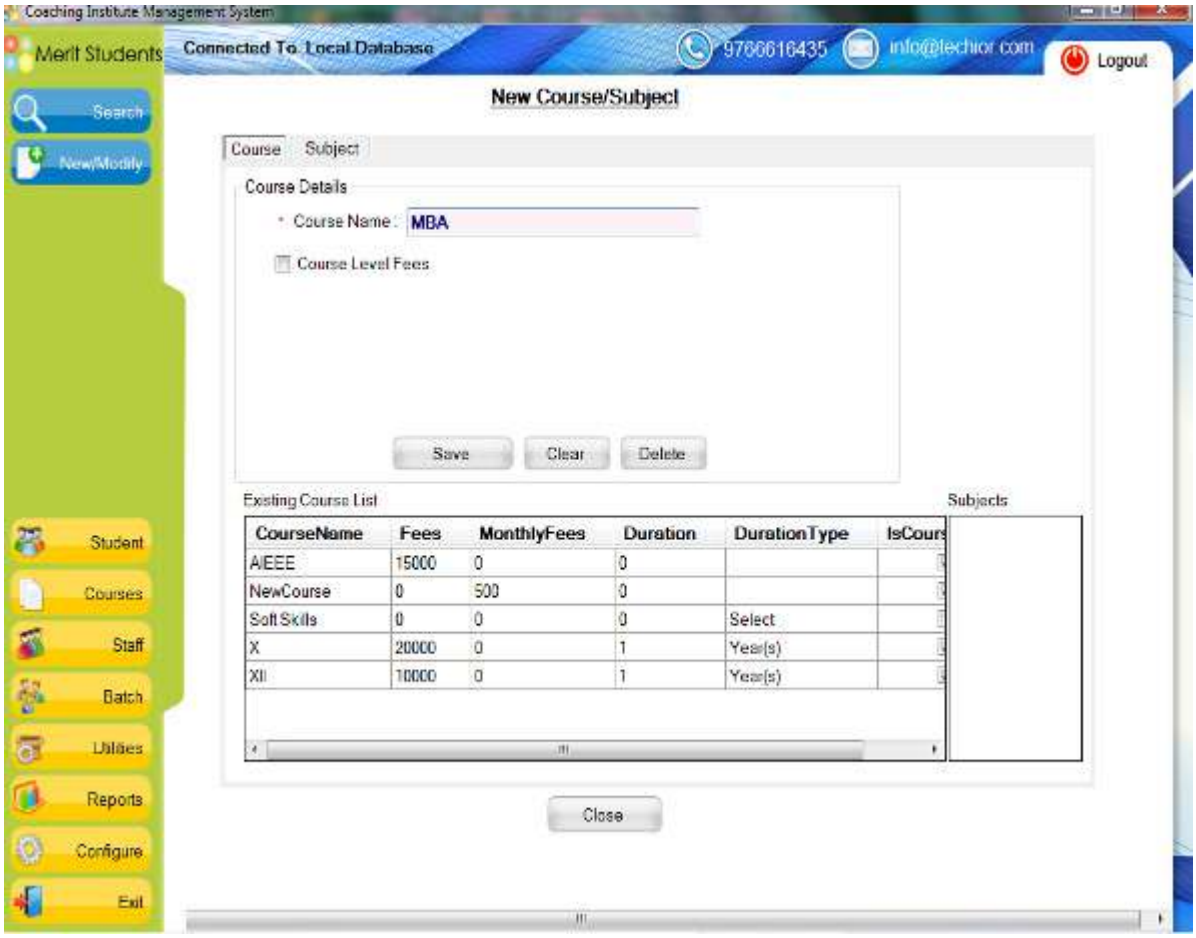
Here you can define the installment template if the course is having total fees. Once the installments are set while defining the course, then whenever a student registers for that course, then installment structure will get automatically attached with student details. This will help you in reducing the efforts of creating installments for each & every student.



Click on Create template, it will open the Template window, define interval period or monthly fixed day. Enter the number of installments to be created & click on Ok & then click on save.

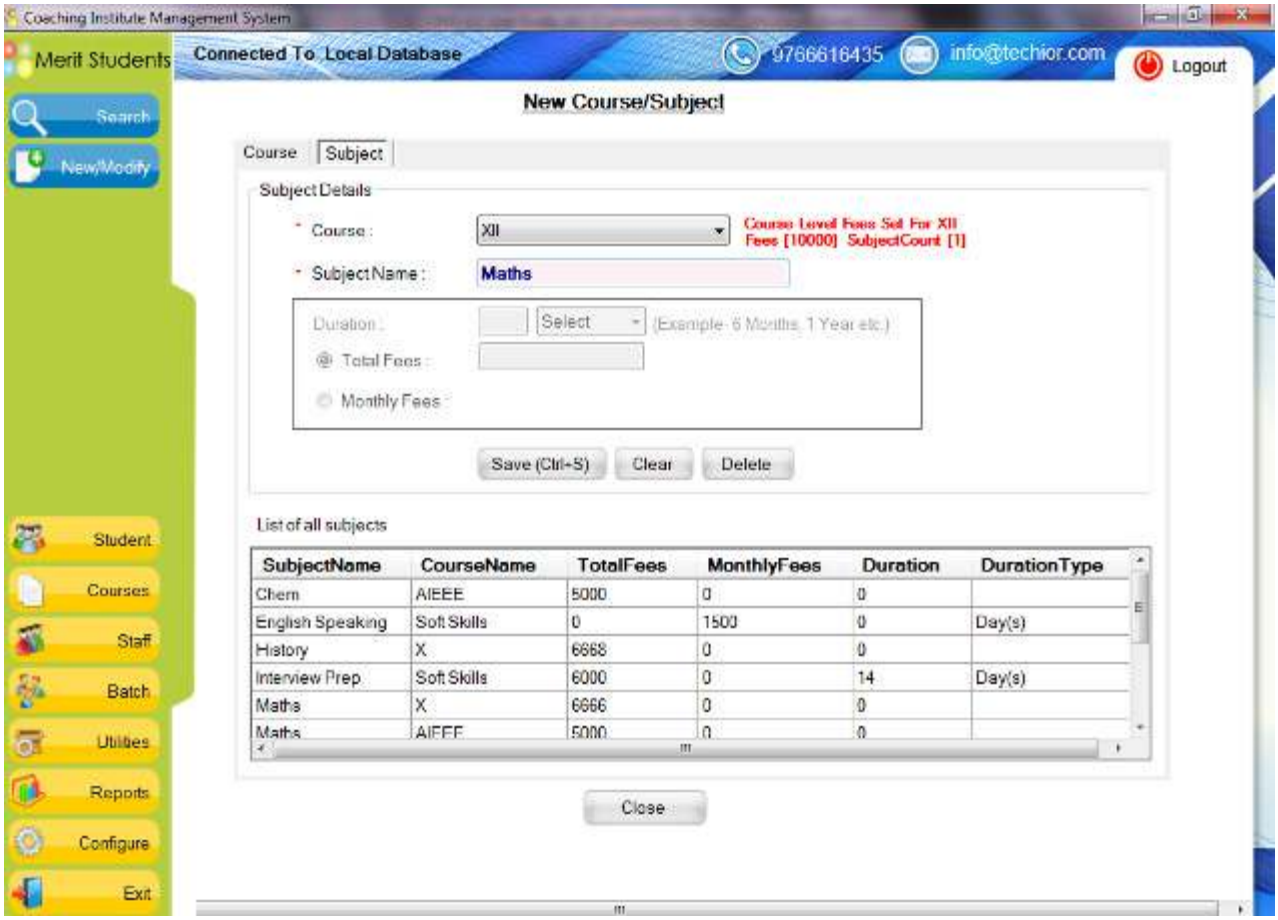
Add a course with subject level fees:

First select the course tab, click on “New/Modify” and add the names of the courses that are offered at your institute. If the fee is to be defined at subject level, then simply enter the course name & save it, as shown below.



Add a subject under course level fees:

Then select the subject tab to add the subjects belonging to the course. Select the course name added earlier and add the names of the subjects that are offered under the selected course at your institute.

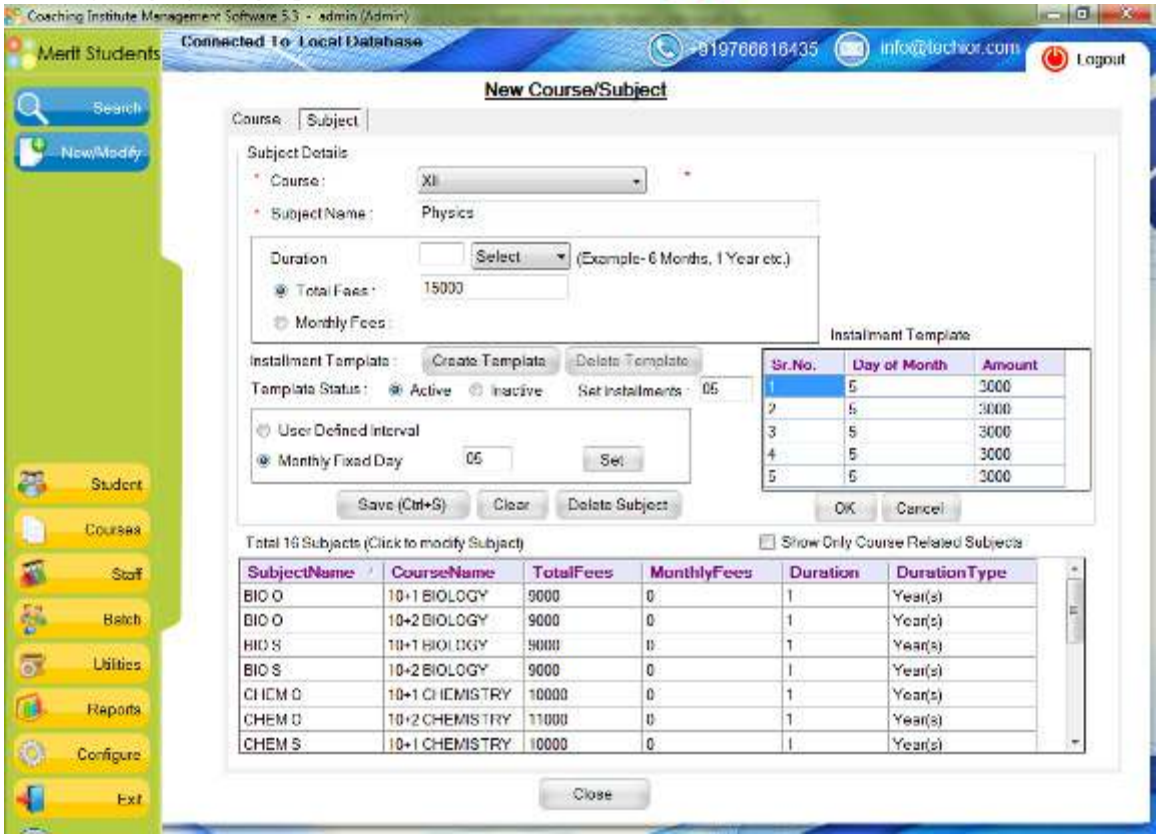


Add a subject with subject level fees

Then select the subject tab to add the subjects belonging to the course. Select the course name added earlier and add the names of the subjects that are offered under the selected course at your institute.

Here you can set the duration and the fees of the subjects (either Total or Monthly)

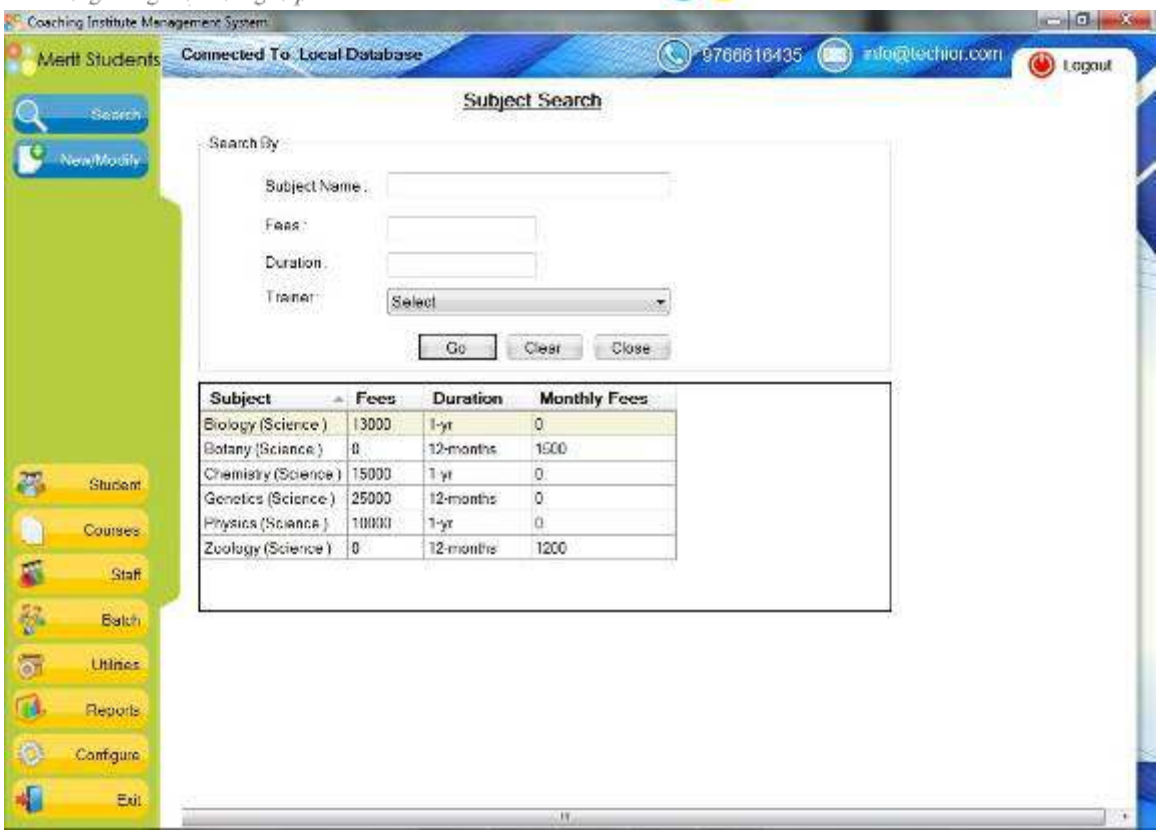
Here you can define the installment template if the course is having subject level total fees.
Once the installments are set while defining the subjects, then whenever a student registers for that course/subject, then installment structure will get automatically attached with student details. This will help you in reducing the efforts of creating installments for each & every student.



Search Subjects

There is a “Search” form using which you can search for subjects based on any of the specified criteria.

E.g. In the following form, select “Trainer” Anup Sadhu and click on “Go” to see all the courses that Anup Sadhu teaches.

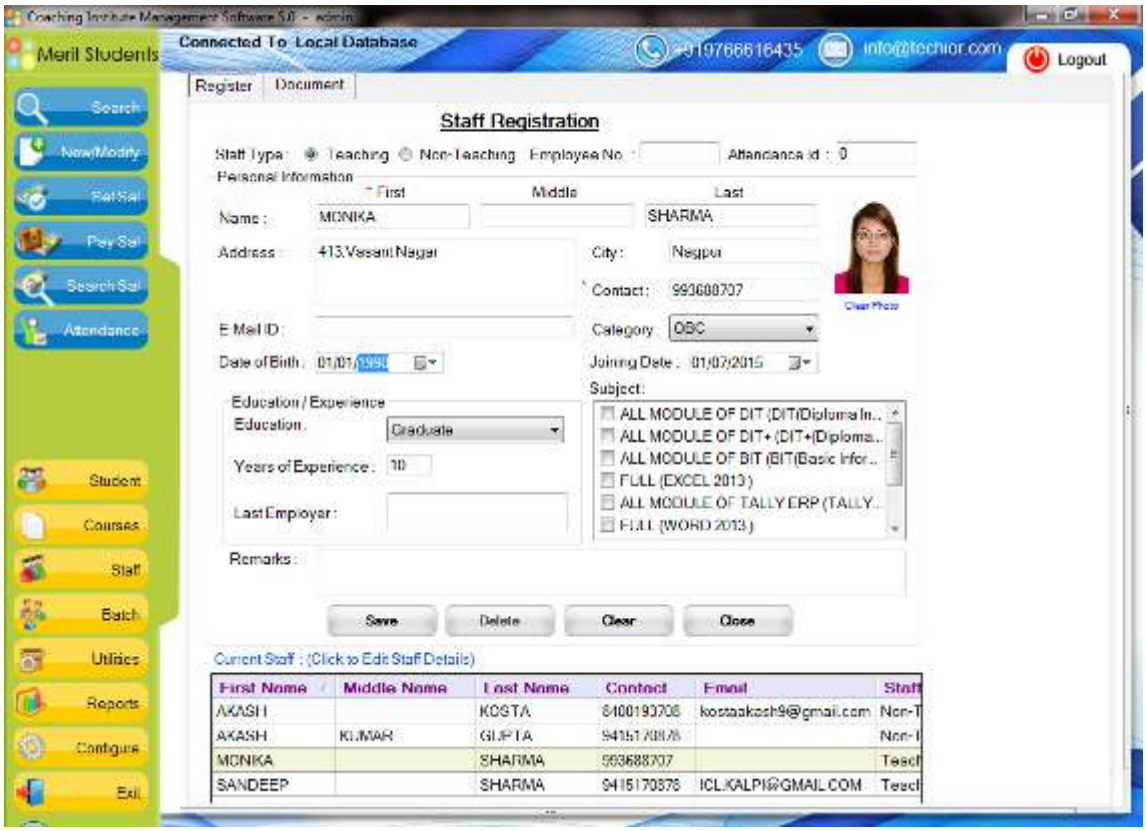


Staff Module

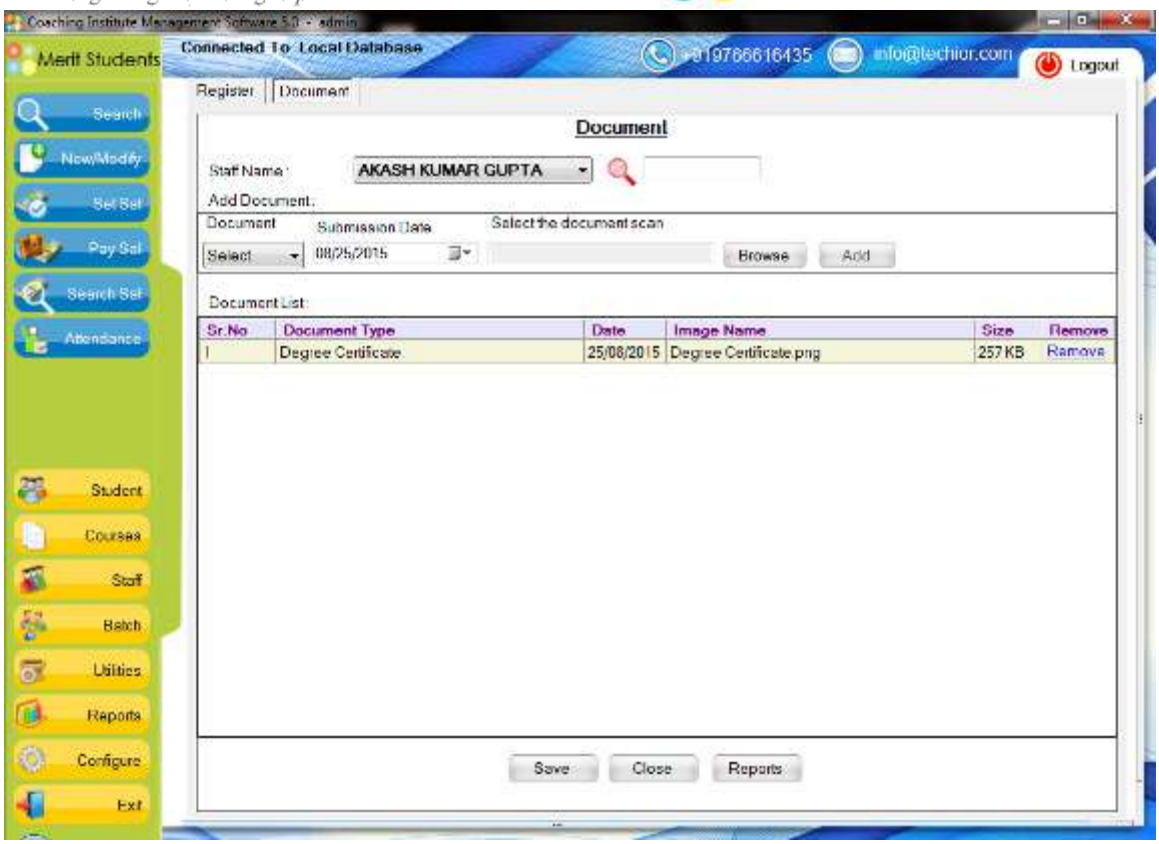
Trainer module is for keeping trainer master details like name, photograph, address, contact numbers, email, educational qualification, experience and the course(s) which the trainer is going to teach. It allows you to add/modify trainer information. Double-click on a trainer in the list of trainers at the bottom of the form to see the trainer details. Then make the required changes and click “Update” to save the changes.

When you click on “Add Photo” on the Trainer Registration form, you will find two ways in which you can take the trainer photo:

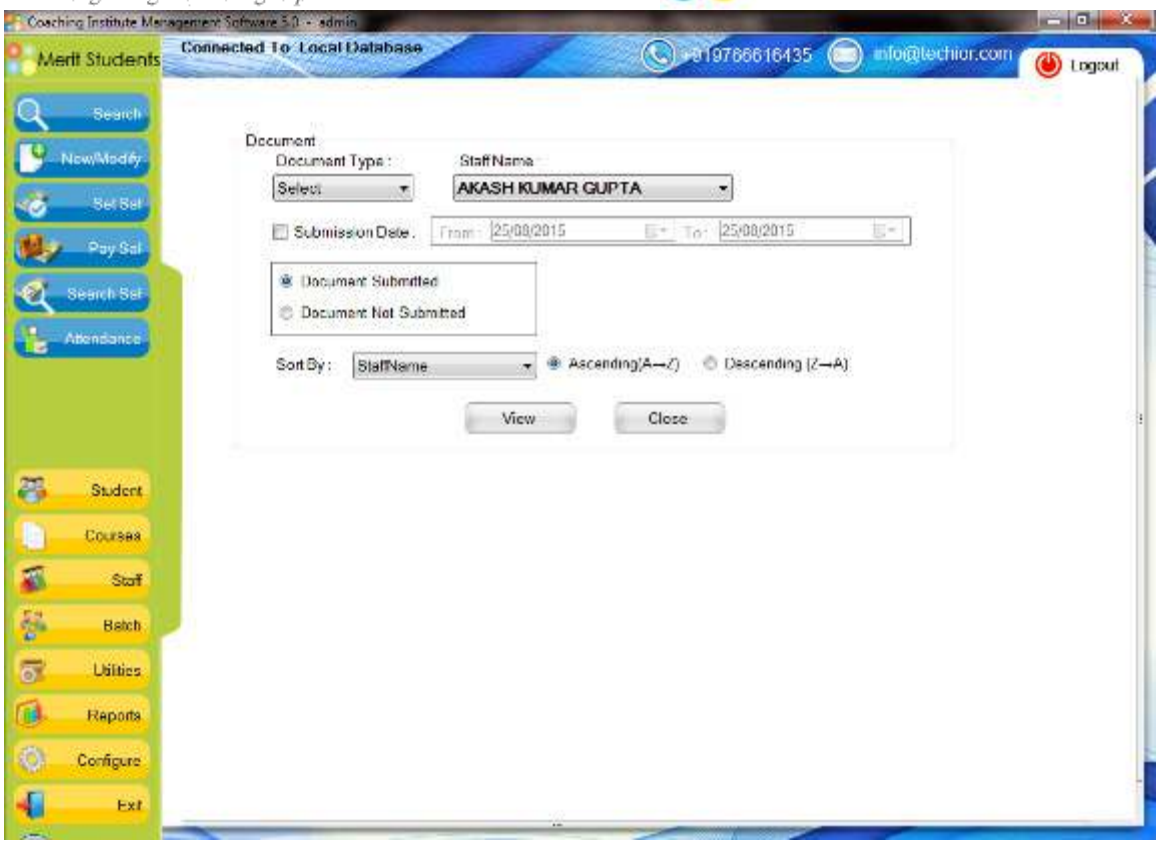
1. Browse on the computer to select an existing image.
2. Take a picture using Webcam. Just connect your webcam to the computer using USB and take a picture on the spot.



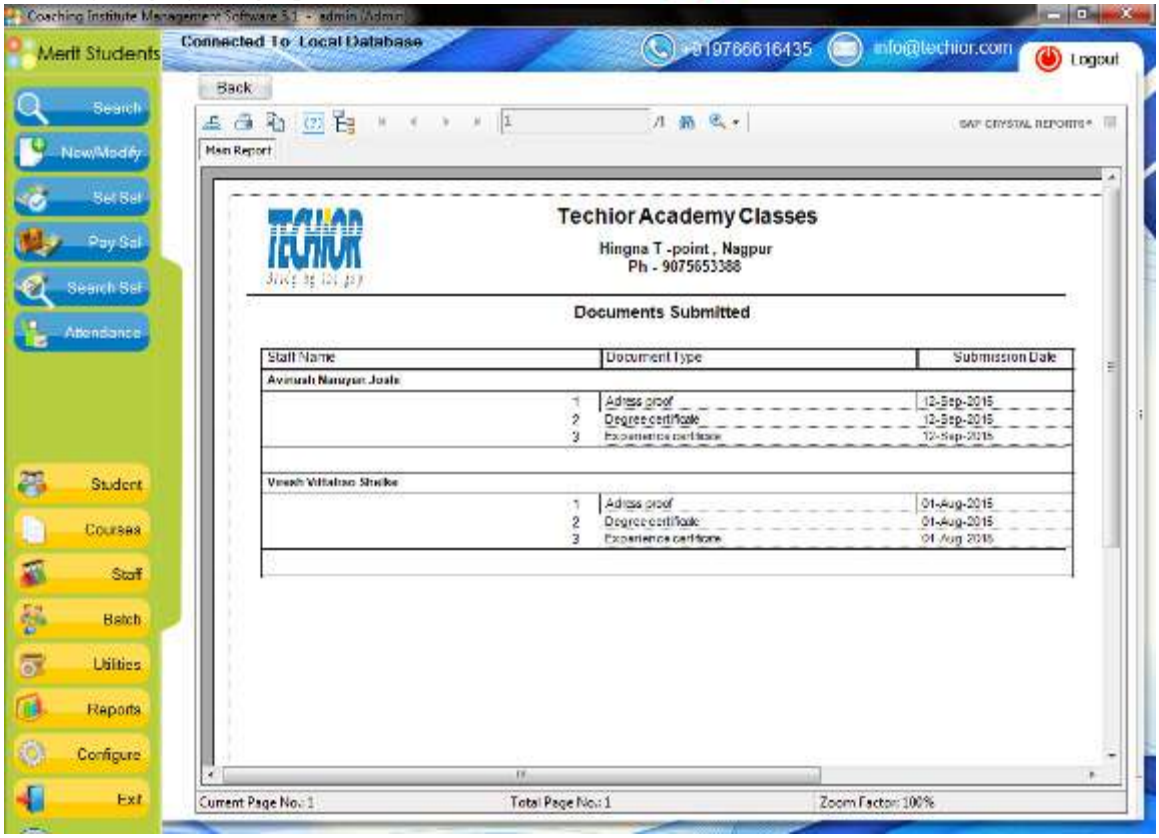
Staff Documents: Here the staff can submit the scanned copies of different documents. Go to Staff Register->document, select Staff name of whom documents to be saved ,Select the document type, date of submission & then browse the image & then click on add & then click on save.



Reports for the documents submitted by the staff can be seen by clicking on "**Reports**" button on the same form.

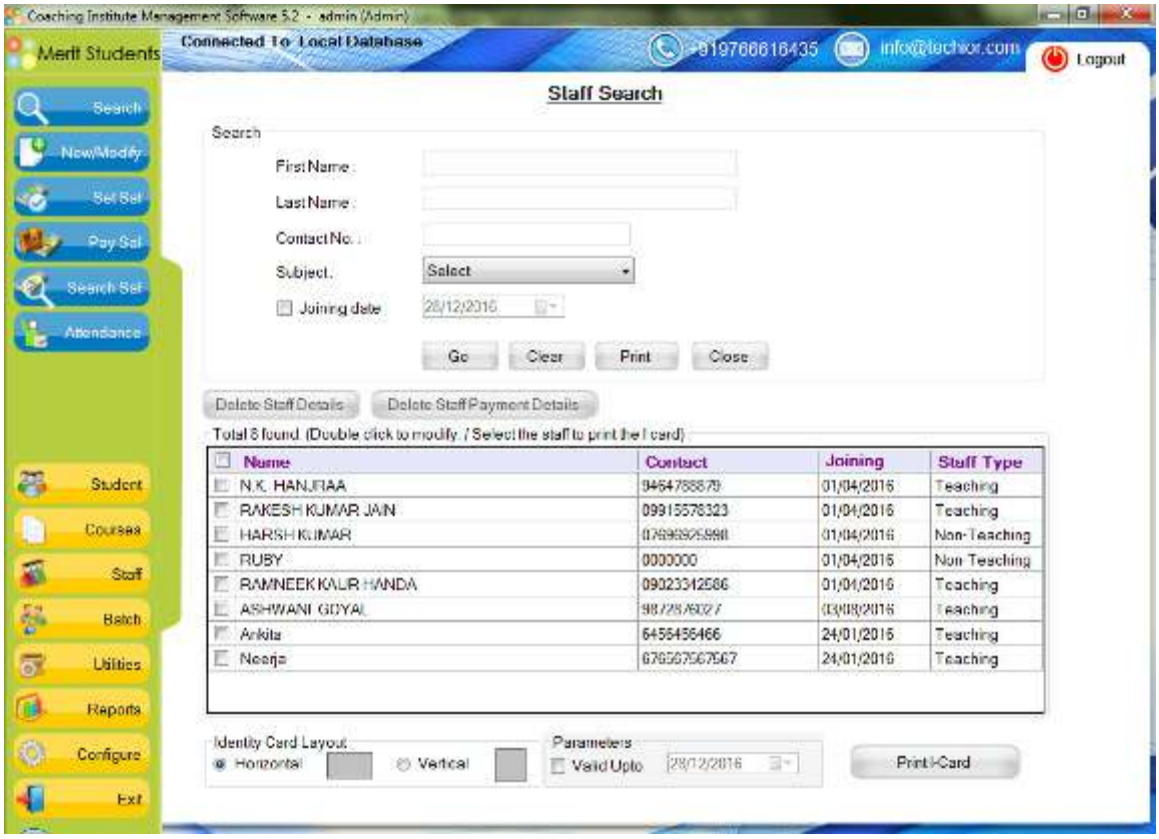


Select the criteria for which you want o generate the report & then click on view.


Coaching Institute Management Software 5.1 - admin (Admin)
Merit Students
Connected To Local Database
+919766616435
info@techior.com
Logout
Back
Search
New/Modify
Set Sal
Pay Sal
Search Sal
Attendance
Student
Courses
Staff
Batch
Utilities
Reports
Configure
Exit
Main Report
SAP CRYSTAL REPORTS
Techior Academy Classes
Hingna T -point , Nagpur
Ph - 9075653388
Documents Submitted
Staff Name
Document Type
Submission Date
Avinash Nanyan Joshi
1 Adress proof 12-Sep-2015
2 Degree certificate 12-Sep-2015
3 Experience certificate 12-Sep-2015
Vinesh Vittalrao Shelke
1 Adress proof 01-Aug-2015
2 Degree certificate 01-Aug-2015
3 Experience certificate 01-Aug-2015
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 100%

Staff Search

There is a “Search” form using which you can search for trainers based on any of the specified criteria. Double-click on a trainer in the grid at the bottom to update the trainer details.



Here Staff I-Card can be generated; Click on search button, list of staff is generated , tick on particular staff member & select the horizontal or vertical manner in the I- card is to be generated. Then click on view Staff I-card will be generated.

Staff I card:

Horizontal View:

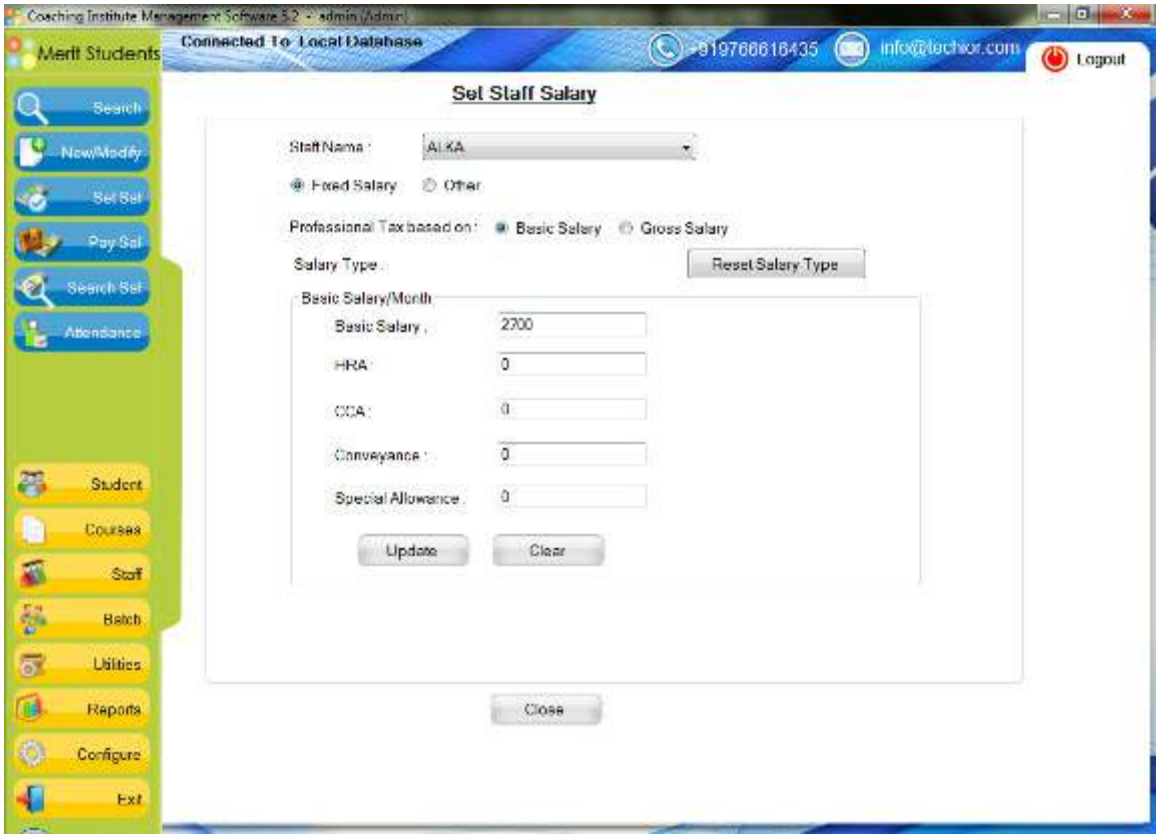
Vertical View:

Set Staff Salary

Here you can create the salary setup modules for a trainer.
There are 6 types of Salary Modules available:

- Fixed salary
- Hourly Salary (Hourly)
- Per Student Per Month (Per student)
- Fixed Salary + Commission (Fixed Amount + Comm.)
- Course Fees
- Salary based on Number of Students (Based on Students)

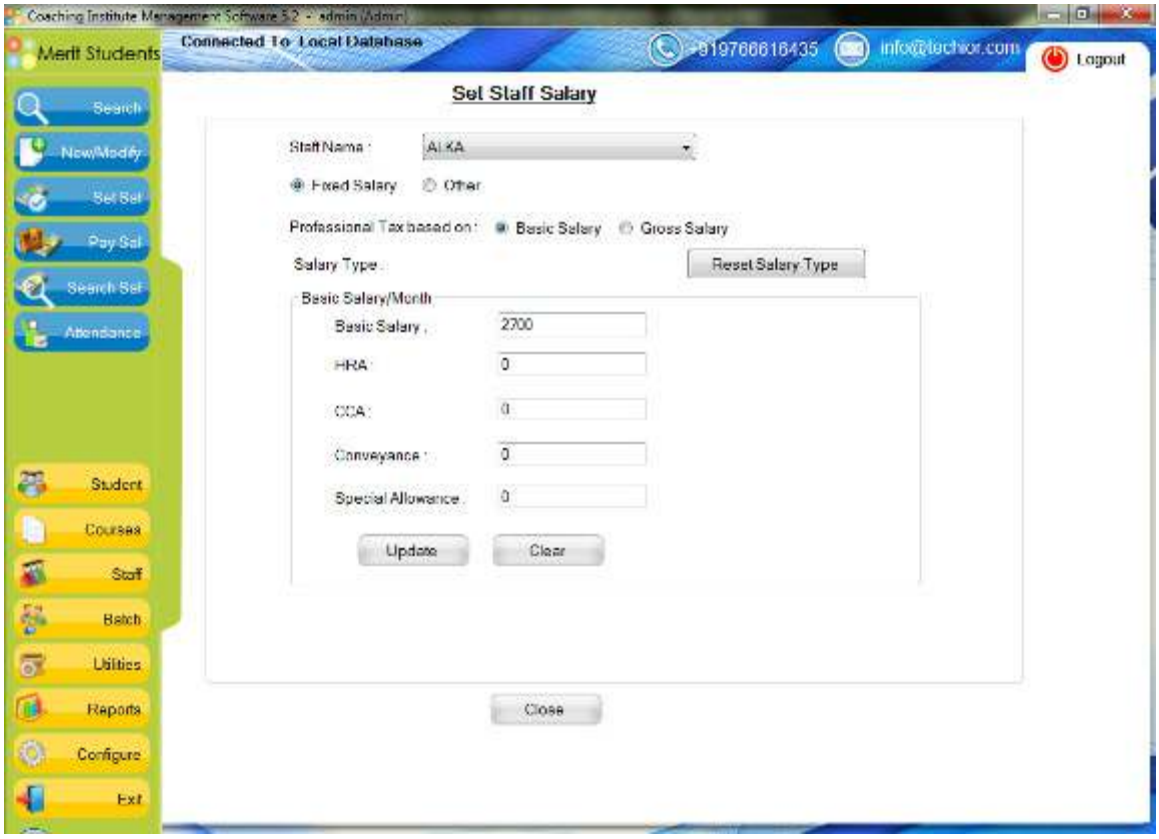
Only one Salary module can be specified for a batch. If a trainer has 6 batches, then 6 different types of salary setups can be created.



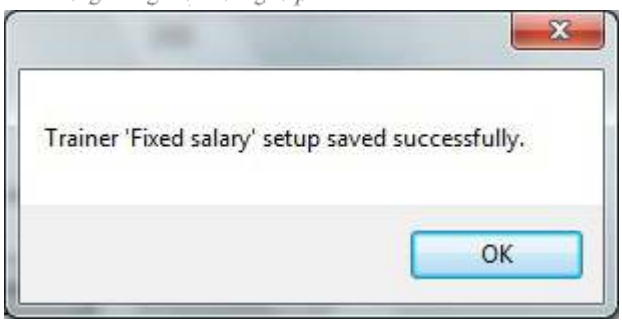
Note: "**Fixed Salary**" setup is independent of batch; hence even "**Non-teaching**" staff are applicable for this setup. Also please note, if "**Other**" type(s) of salary setup(s) are created for a staff, then "**Fixed Salary**" option will be disabled.

Fixed Salary Setup Preview

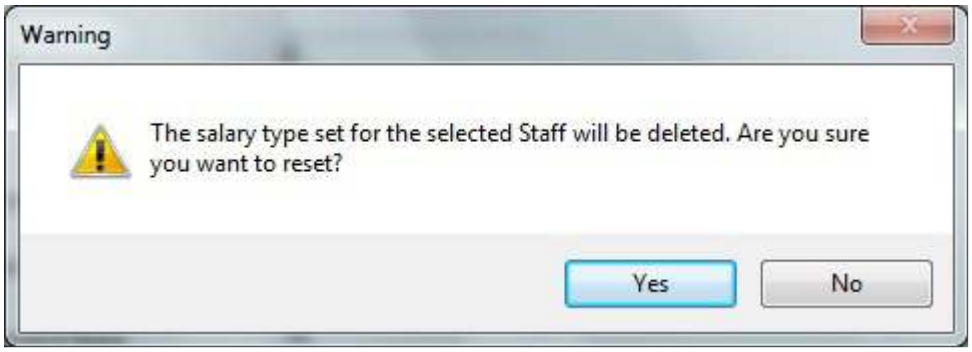
To start creating a salary setup, select a Staff Name and choose "**Fixed Salary**".



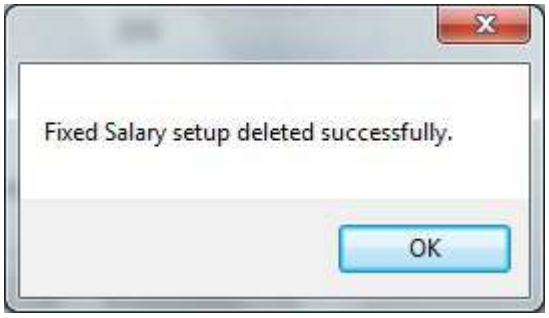
Here you can select whether Profession Tax will be deducted on basic salary or Grass salary. Enter all the necessary fields and click "**Save**". The following confirmation window pops-up:



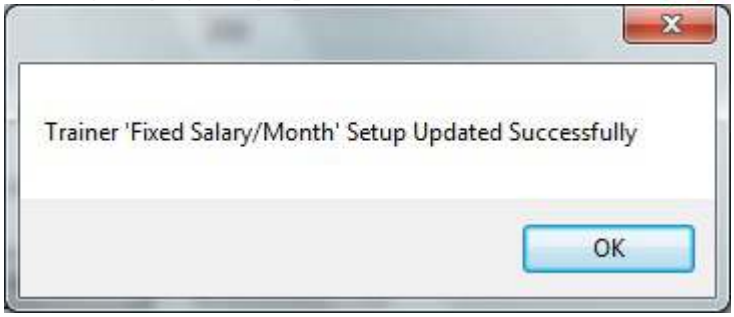
To reset a salary setup created earlier, select the Staff name and its batch name. Now click "**Reset Salary Type**". Below confirmation window will now pop-up:



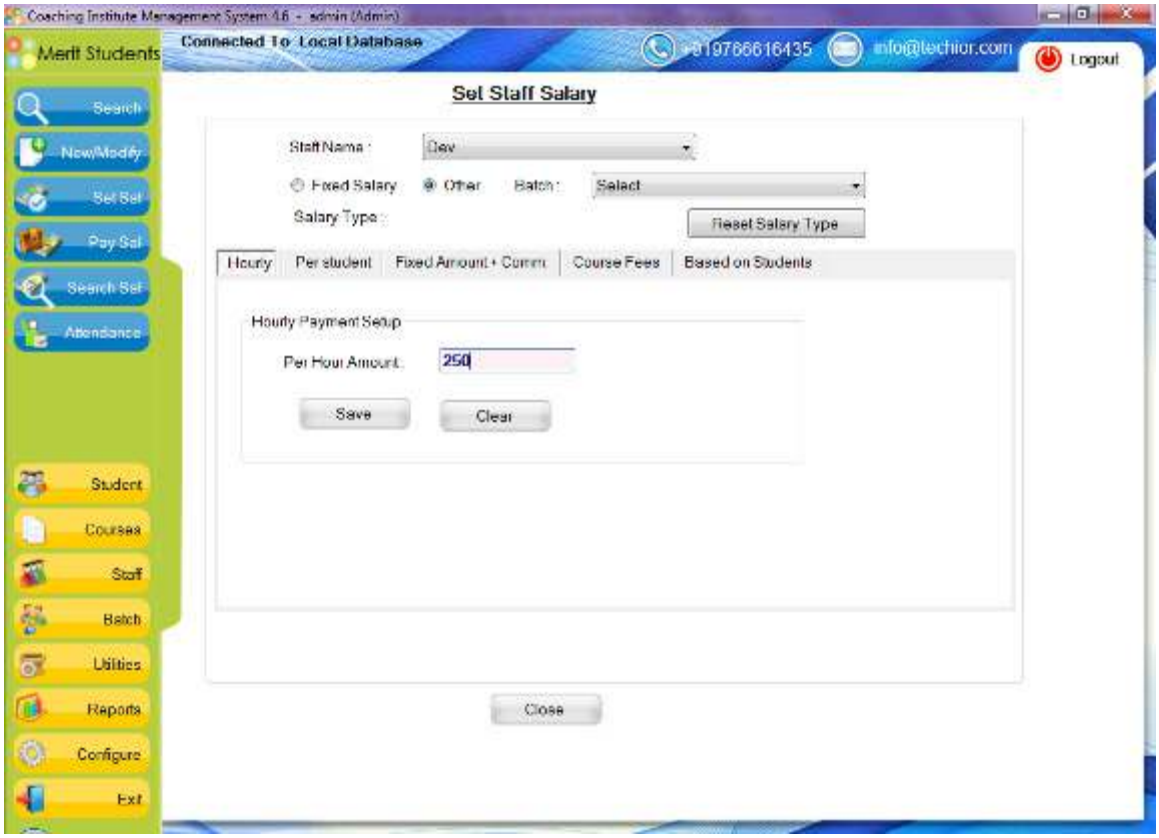
Click "**No**" if setup is not to be deleted, else if "**Yes**" is clicked, below confirmation window will pop-up:



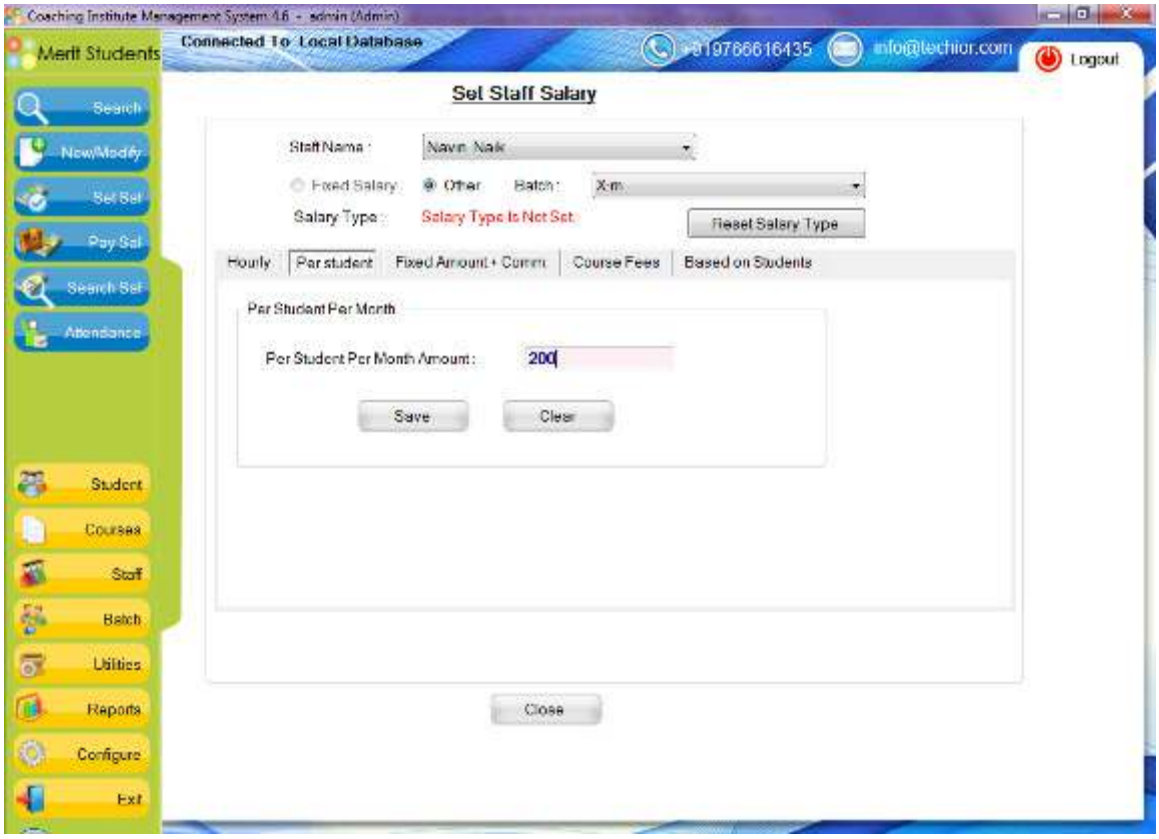
To update an existing salary setup, choose a Trainer Name and its Batch. Now make the necessary changes in the setup and click "**Update**". Below confirmation window will pop-up:



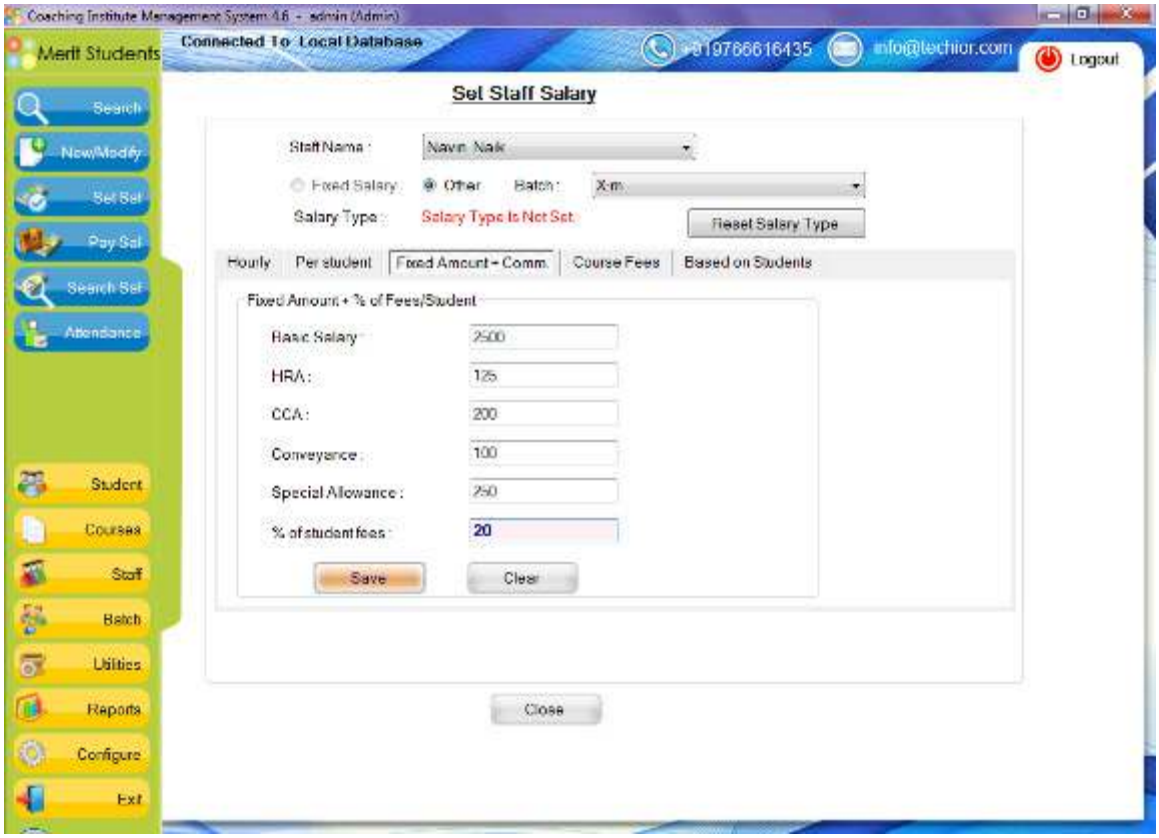
Hourly Salary Setup Preview



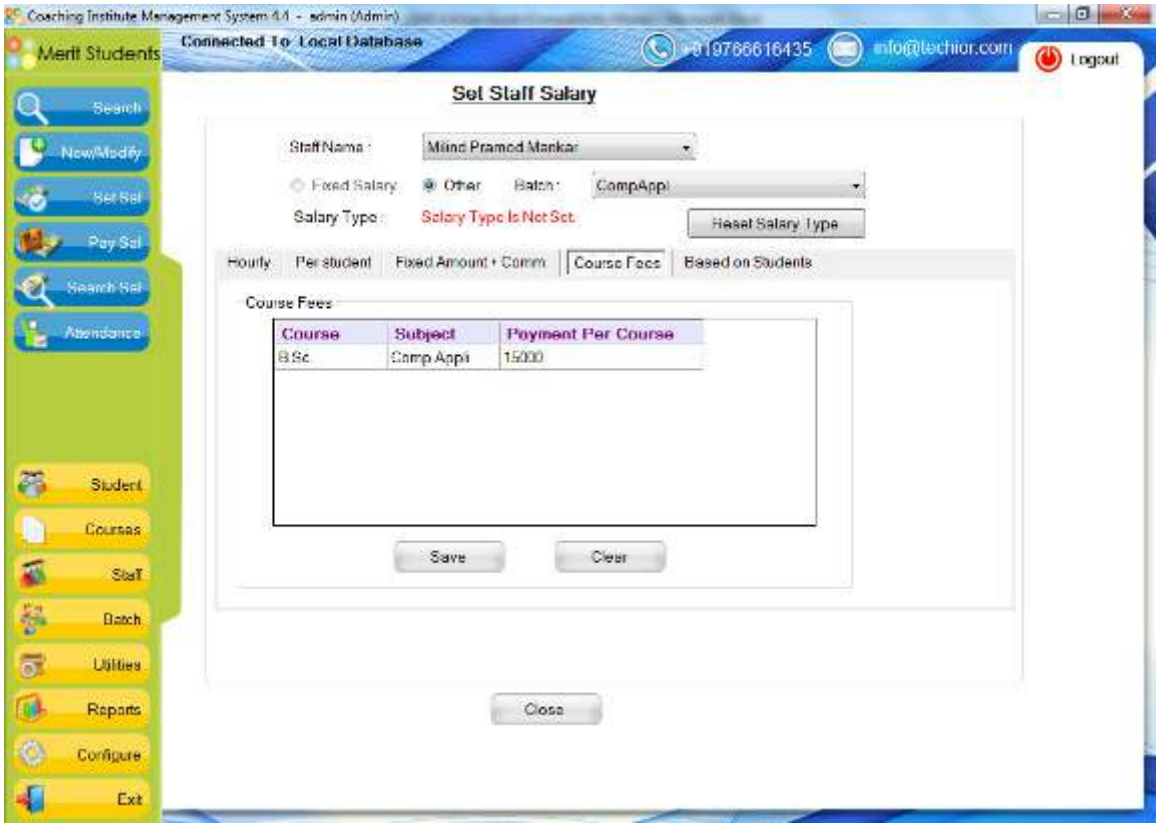
Per Student Salary Setup Preview



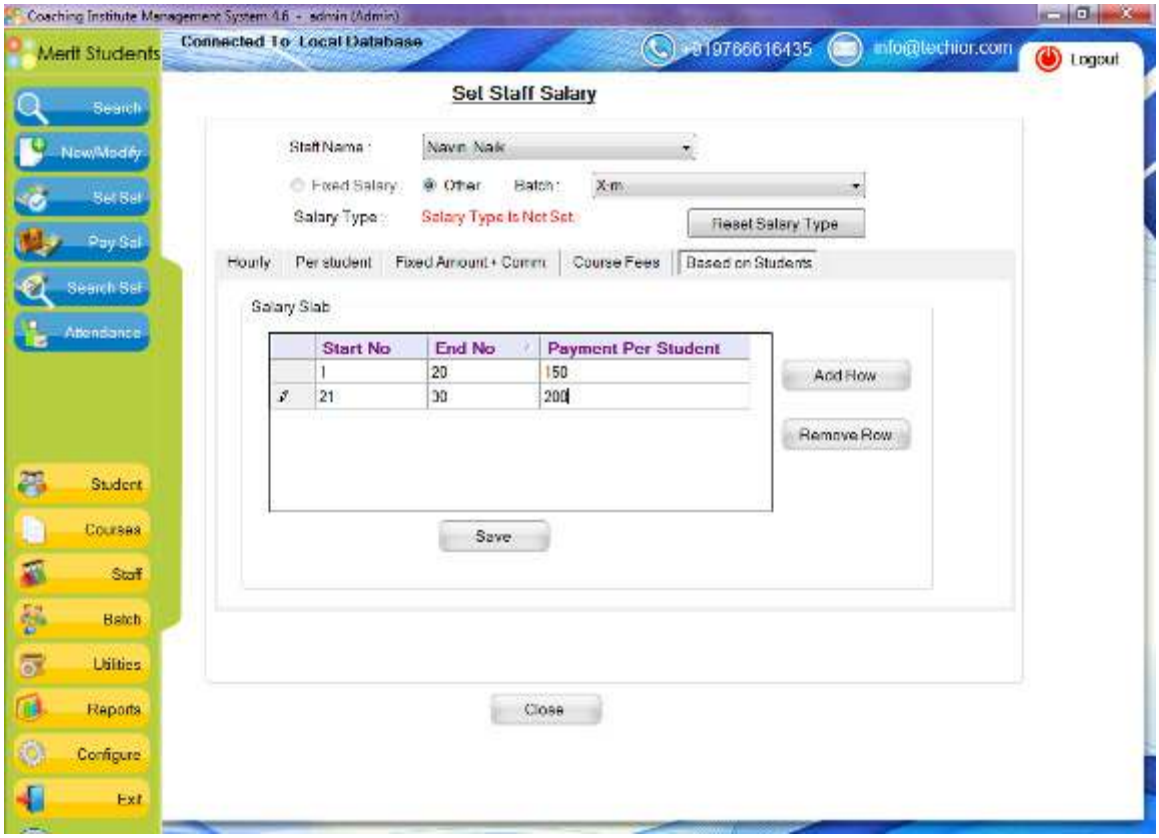
Fixed + Commission Salary Setup Preview



Course Fees Salary Setup Preview



Based on No of Students Salary Setup Preview



Note: Confirmation Pop-up windows for Save / Update / Delete will display the same except that each will display its respective salary type.

E.g.:
Trainer 'Course Fee' Setup saved successfully.
Trainer 'Course Fee' Setup updated successfully.
Trainer 'Course Fee' Setup deleted successfully.

Trainer 'Hourly' Setup saved successfully.
Trainer 'Hourly' Setup updated successfully.
Trainer 'Hourly' Setup deleted successfully.

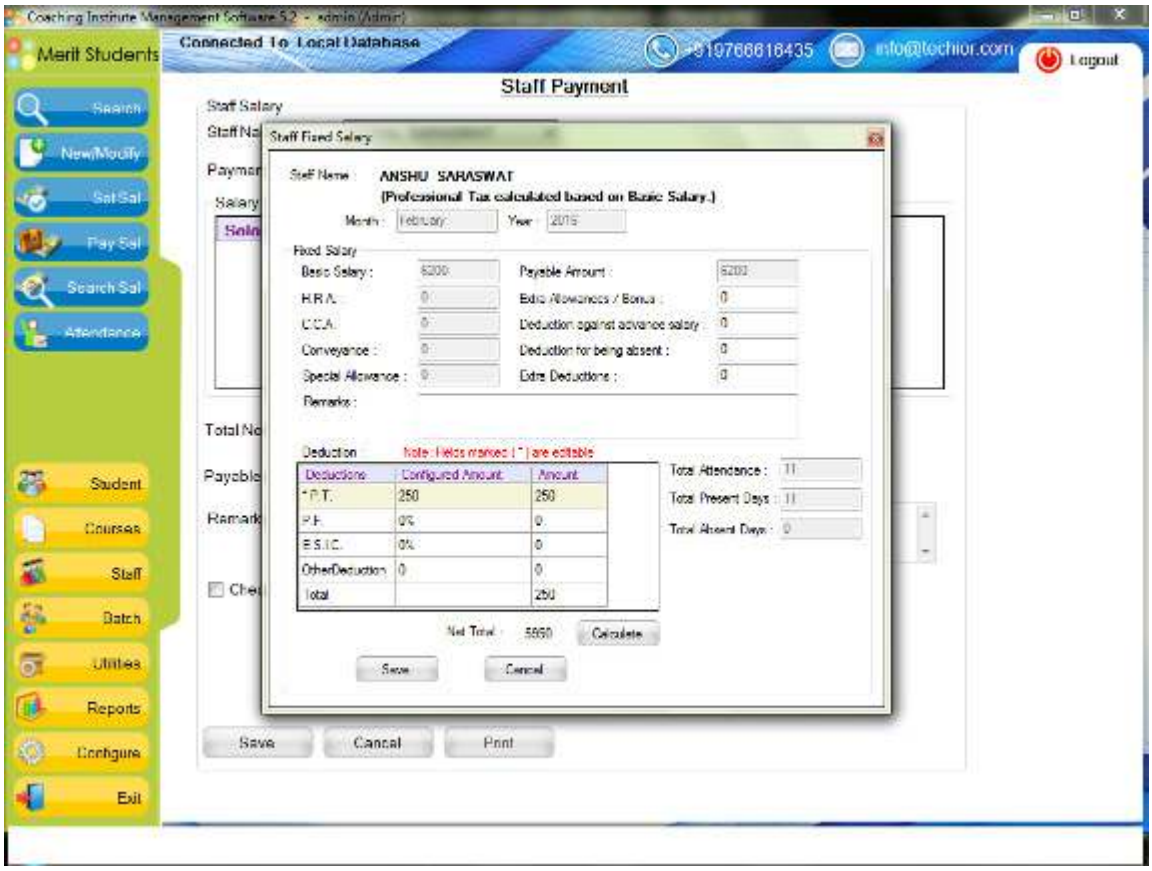
Trainer 'Per Student' Setup saved successfully.
Trainer 'Per Student' Setup updated successfully.
Trainer 'Per Student' Setup deleted successfully.

Trainer 'Fixed+Comm' Setup saved successfully.
Trainer 'Fixed+Comm' Setup updated successfully.
Trainer 'Fixed+Comm' Setup deleted successfully.

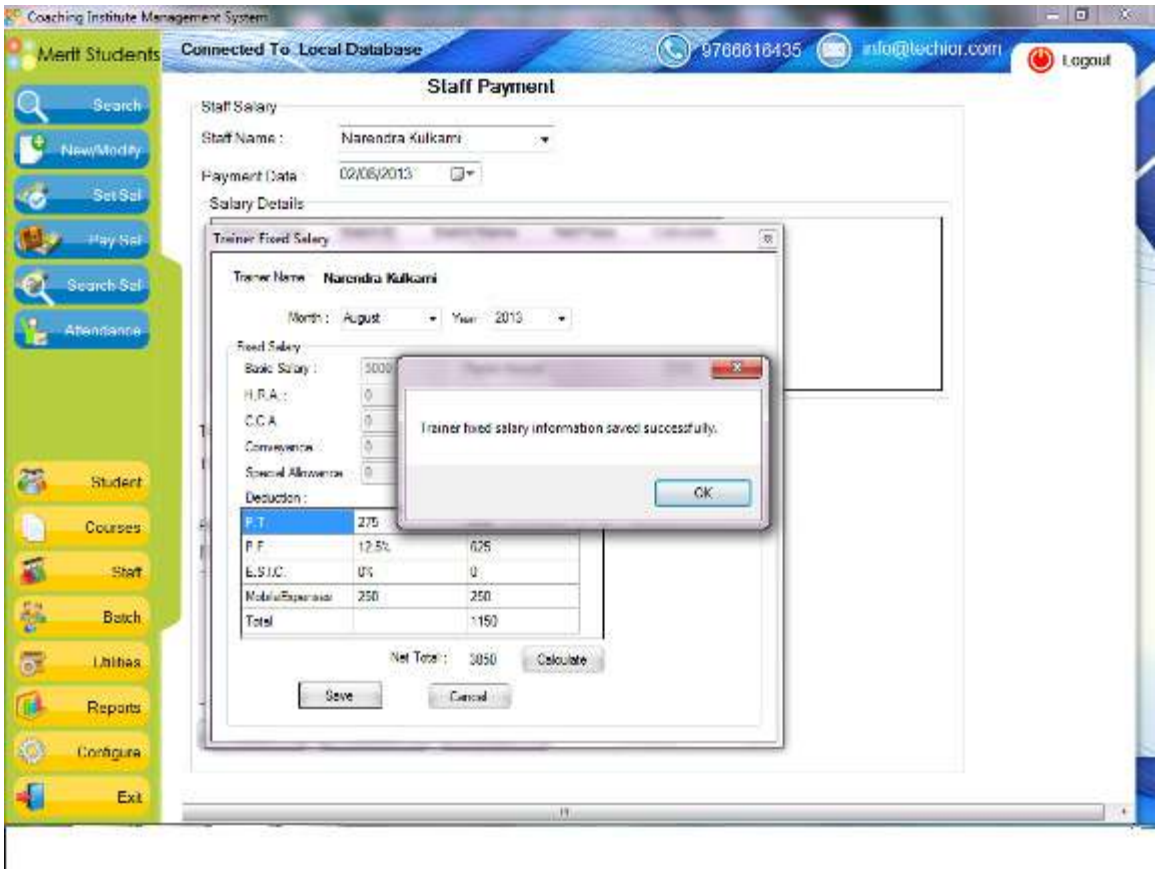
Trainer 'Based on Students' Setup saved successfully.
Trainer 'Based on Students' Setup updated successfully.
Trainer 'Based on Students' Setup deleted successfully.

Pay Sal (Pay Trainer Salary)

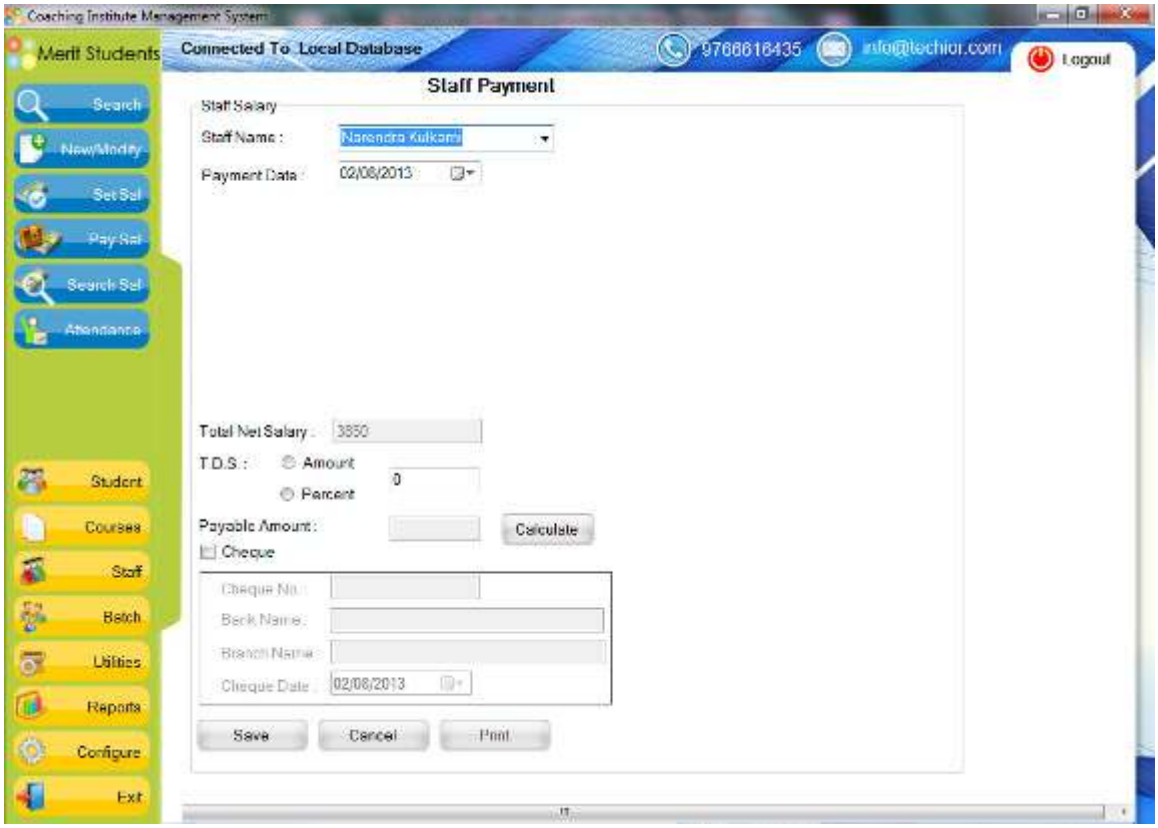
To pay a trainer's fixed salary, choose a trainer name and select payment date. The following screen will open with the popup containing fixed salary details & Deduction details, here Deduction against advance salary & Deduction for being absent fields are given. The values filled in these fields will get deducted from the payable amount after clicking on Calculate button. Then click on Save button to save the salary payment for the selected staff.



The following pop up will come. Click on save. The next window will open.


Coaching Institute Management System
Merit Students
Connected To Local Database
9766616435
info@techior.com
Logout
Staff Payment
Search
New/Modify
Set Sal
Pay Sal
Search Sal
Attendance
Student
Courses
Staff
Batch
Utilities
Reports
Configure
Exit
Staff Salary
Staff Name :
Narendra Kulkarni
Payment Date
02/08/2013
Salary Details
Trainer Fixed Salary
Trainer Name
Narendra Kulkarni
Month :
August
Year
2013
Fixed Salary
Basic Salary :
H.R.A. :
C.C.A.
Conveyance :
Special Allowance
Deduction :
P.T.
275
P.F.
12.5%
625
E.S.I.C.
0%
0
Mobile/Expenses
250
250
Total
1150
Net Total :
3850
Calculate
Save
Cancel
Trainer fixed salary information saved successfully.
OK

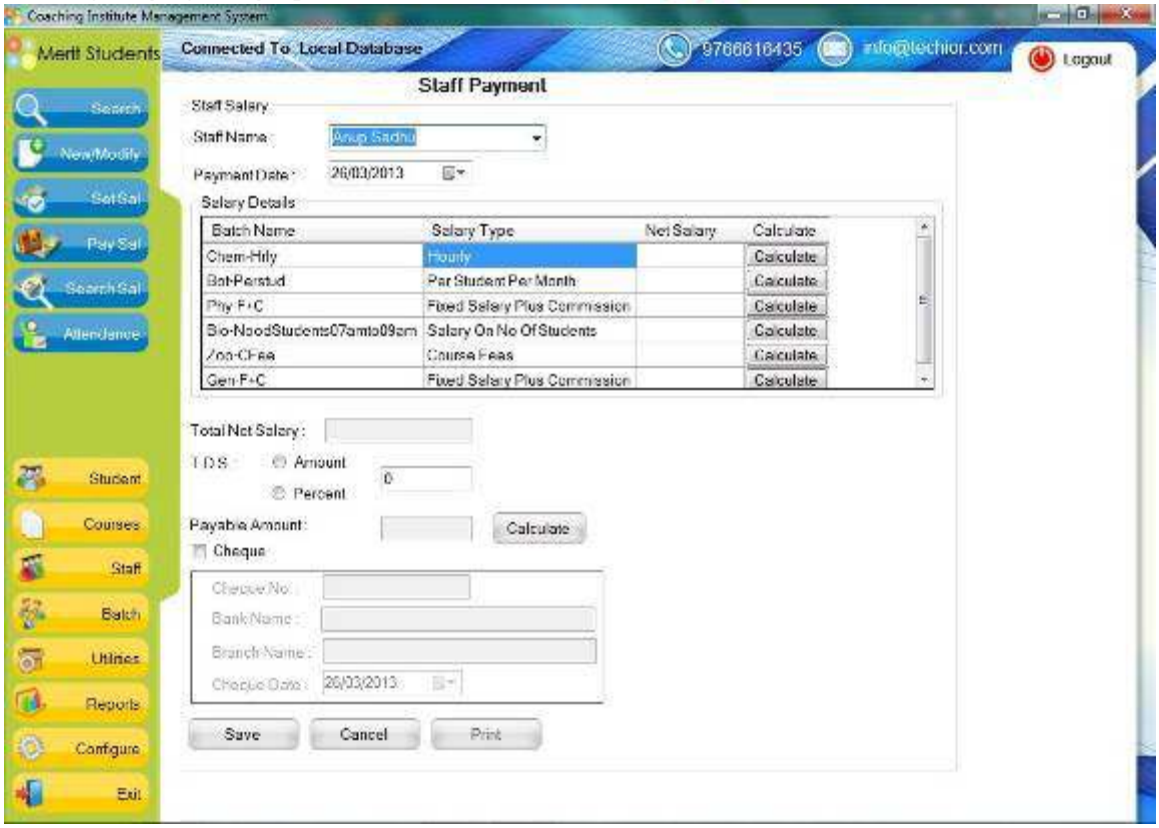
Click on ok following window will open.



By default, all the values given in the “Fixed Salary setup”, along with the values of **Deduction** (Professional Tax, P.F, E.S.I.C Rates and Mobile Expenses Limit specified in Payroll Setup) will be displayed. Enter values for “**Deduction against advance salary**” and “**Deduction for being absent**” if any and click “**Calculate**”. Click “**Save**” to save the Fixed Salary Calculation and revert back to “**Trainer Payment (Pay Trainer Salary**)” window.

Pay Sal (Pay Trainer Salary)

To pay a trainer’s salary, choose a trainer name and select payment date. By default, all the salary setups created will be displayed in the “Salary Details” window.



Click on "**Calculate**" in "**Salary Details**" for a salary type to calculate the salary to be paid. Once calculation of salary is done in salary details window, "**Total Net Salary**" will be displayed above.

Enter T.D.S here, either in "**Amount**" or in "**Percent**", to be deducted from "**Net Salary**". Once T.D.S is entered, click "**Calculate**" to calculate the "**Payable Amount**".

To pay salary in cash, just click "**Save**". If salary needs to be paid by cheque, check the check-box for "**Cheque**", enter the Cheque Details and click "**Save**".
If the staff payment receipt is generated click on **Print** it will generate the receipt.

Coaching Institute Management System 4.6 - admin (Admin)

Merit Students | Connected To Local Database | +919766616435 | info@techior.com | Logout

Search
New/Modify
Set Sal
Pay Sal
Search Sal
Attendance
Student
Courses
Staff
Batch
Utilities
Reports
Configure
Exit

Back

Main Report

Techior Solutions Pvt. Ltd

Godavari Complex, Hingna T-Point
Ph - 9766616535

Salary Statement for the month of December 2013

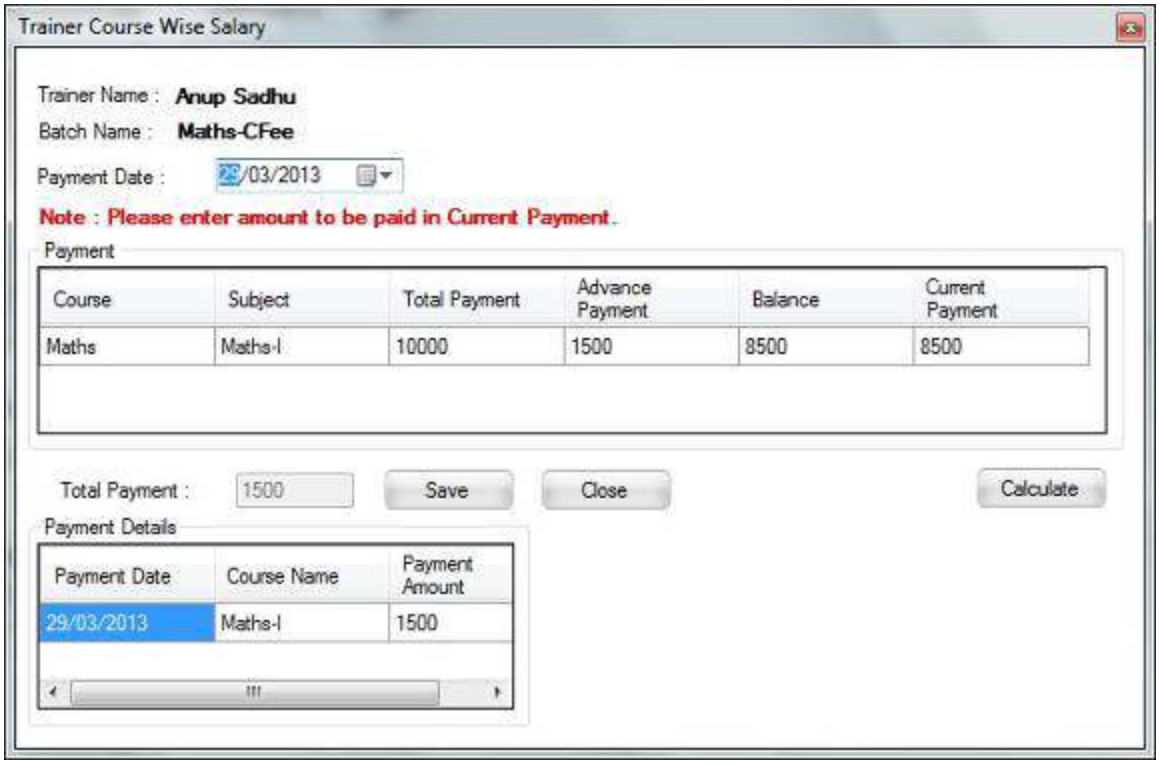
	INCOME	Amount		DEDUCTION	Amount
1	Basic Salary	6,500	1	Professional Tax	175
2	HRA	0	2	Against Advance Salary	0
3	CCA	0	3	P. F	832
4	Conveyance	0	4	E.S.I.C	812
5	Special Allowance	0	5	Other Deduction	0
			6	Deduction for being absent	100
	Gross Salary :	6,500		Deduction :	1,769
	Total Amount :	4,730		TDS :	0
	Net Salary Payable :	4,730			

In Words : Four Thousand Seven Hundred Thirty Only

Employee Name : Taniya
Registration No :
Payment Date : 12-Dec-2013 Payment Mode : Cash
Cheque No. : Cheque Date :
Bank Name :

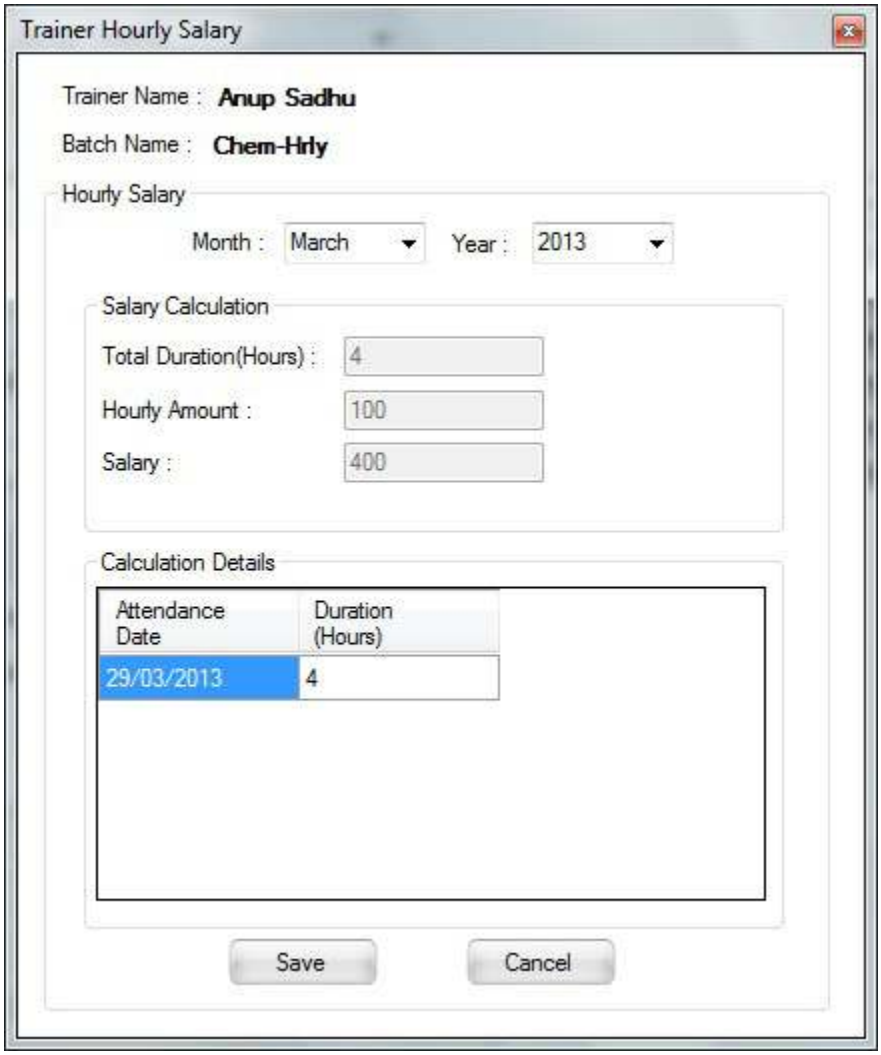
Current Page No.: 1 | Total Page No.: 1 | Zoom Factor: 100%

Course Fees Calculation:



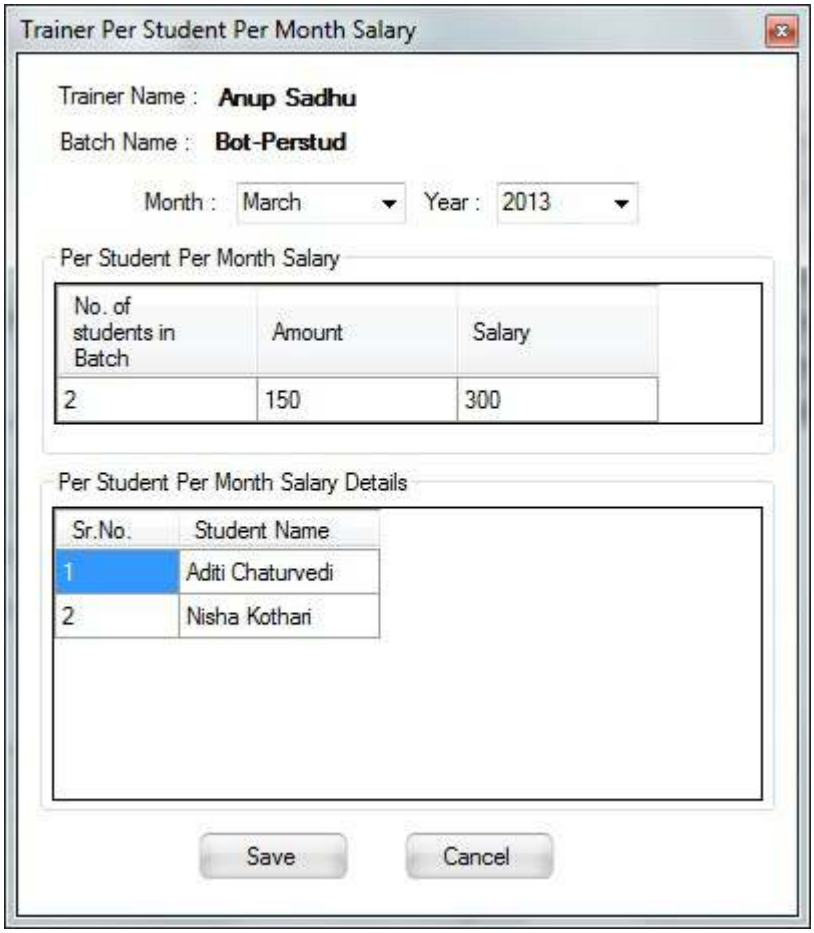
To pay a small partial amount or full amount, enter the amount in "**Current Payment**", click "**Calculate**" and then click "**Save**". Click "**Close**" to revert back to "**Trainer Payment (Pay Trainer Salary**)" window.

Hourly Salary Calculation:



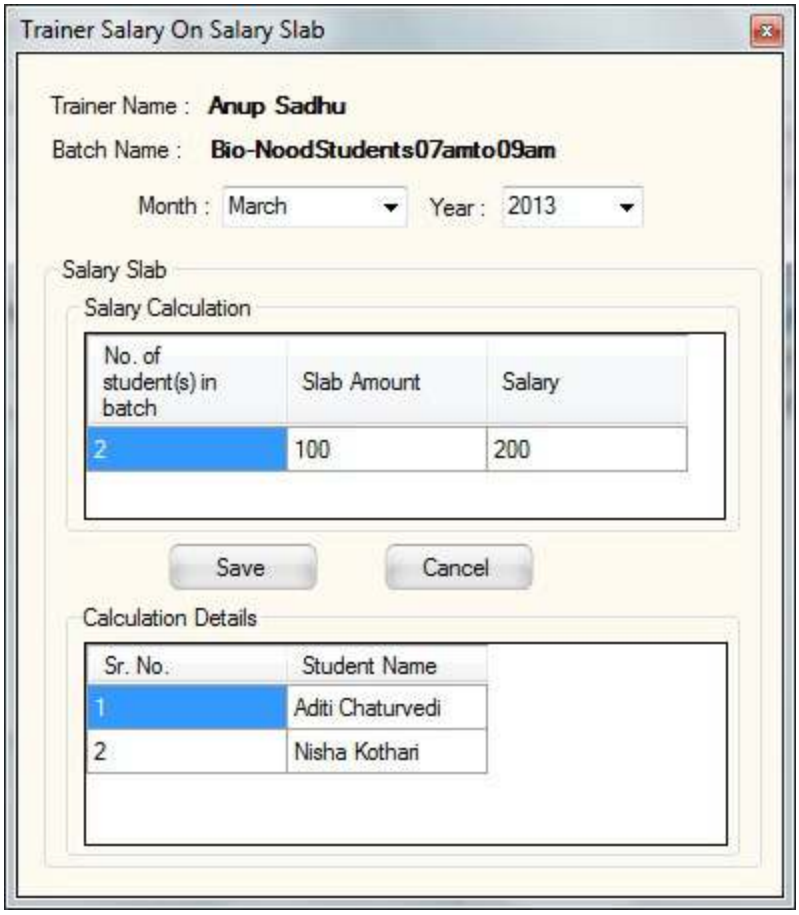
By default, current month / year will be chosen here. No. of Hours of each day for the current month will be displayed here. Click "**Save**" to save the Hourly Salary Calculation and revert back to "**Trainer Payment (Pay Trainer Salary)**" window.

Per Student Salary Calculation:



Salary is being calculated here on the basis of No. of Students in a specified batch. In this type of setup, the trainer is paid a fixed amount per student. "**No. of Students**" and the "**Student Name**(s)" will be displayed as above in "**Per Student per Month Salary Details**". Value in "**Amount**" is the rate charged per student. Click "**Save**" to save the Per Student Salary Calculation and revert back to "**Trainer Payment (Pay Trainer Salary**)" window.

Salary Slab Calculation:



Salary is being calculated here on the basis of No. of Students in a specified batch. In this type of setup, the trainer is paid different amount depending upon the number of students in the batch. The payment slabs are defined while creating the salary setup.

"**No. of Students**" and the "**Student Name**(s)" will be displayed in "**Calculation Details**". Value in "**Slab Amount**" is the rate charged per student. Click "**Save**" to save the Salary Slab Calculation and revert back to "**Trainer Payment (Pay Trainer Salary**)" window.

Fixed + Commission Salary Calculation:

Trainer Fixed Salary Plus Commission

Trainer Name : **Anup Sadhu**

Batch Name : **Gen-F+C**

Month : March Year : 2013

Fixed Salary Plus Commission

Basic Salary :	3000	Payble Amount :	3275
H.R.A. :	0	Against advance salary :	0
C.C.A.	0	Deduction for being absent :	0
Conveyance :	0	Student Commission :	275
Special Allowance :	0		

Deduction :

P.T.	200	200
P.F.	10%	250
E.S.I.C.	12%	300
MobileExpenses	200	200
Total		950

Commission Details

Student Name	Fees Paid
Aditi Chaturvedi	2750

Net Total : 2325 Calculate

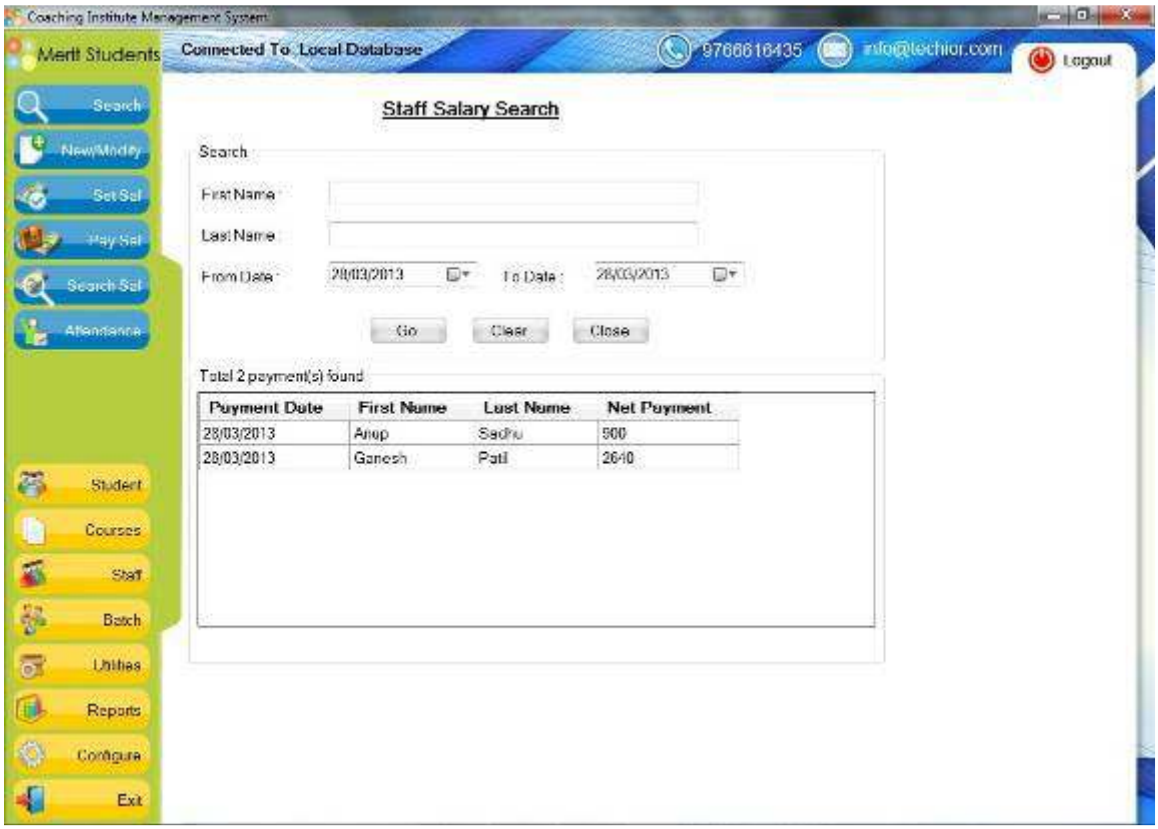
Save Cancel

By default, all the values given in the “Fixed+Comm Salary setup”, along with the values of **Deduction** (Professional Tax, P.F, E.S.I.C Rates and Mobile Expenses Limit specified in Payroll Setup) will be displayed. Student Commission will be calculated on Total of Fees Paid by students.
You can optionally enter values for “**Against advance salary**” and “**Deduction for being absent**” if any and click “**Calculate**”. Click “**Save**” to save the Fixed

Salary Calculation and revert back to "**Trainer Payment (Pay Trainer Salary)**" window.

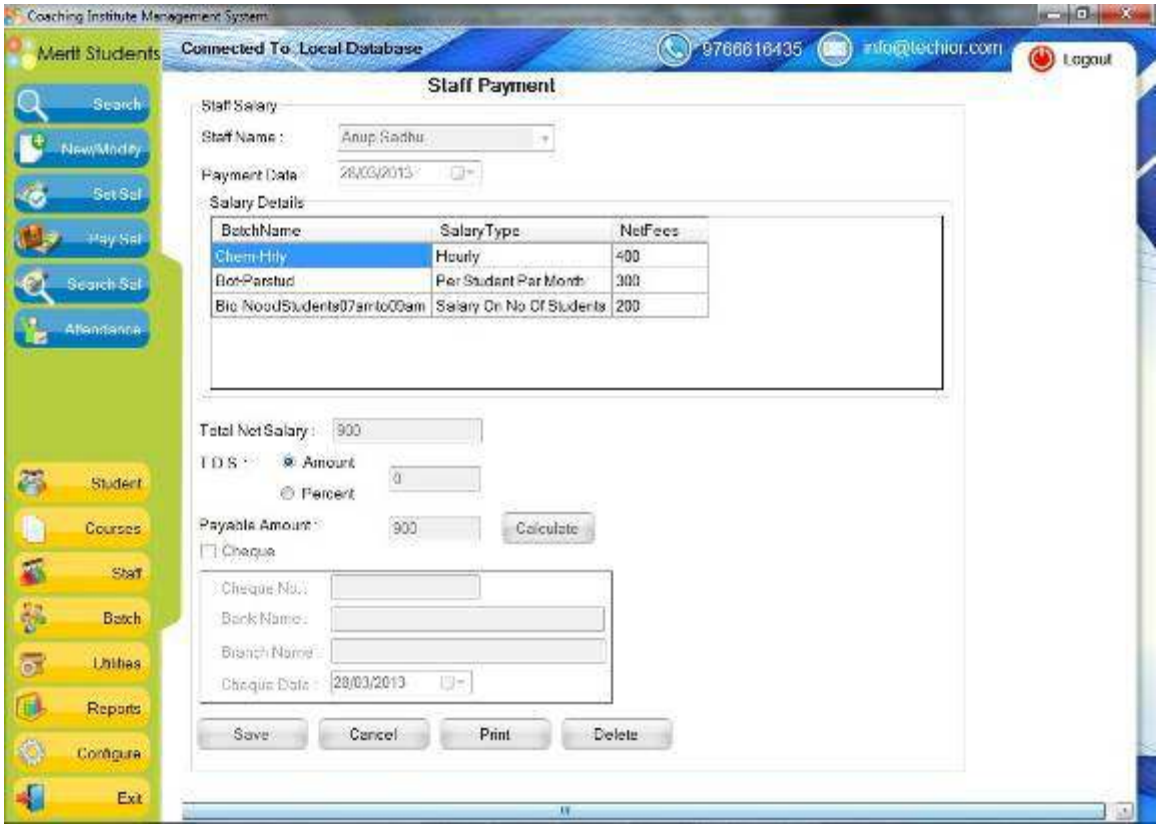
Search Salary

To search a salary paid to a trainer, click "Trainer" in the bottom left menu and "Search Sal" in the top left pane. You can search the salary paid by using any of the fields given in the Search box:

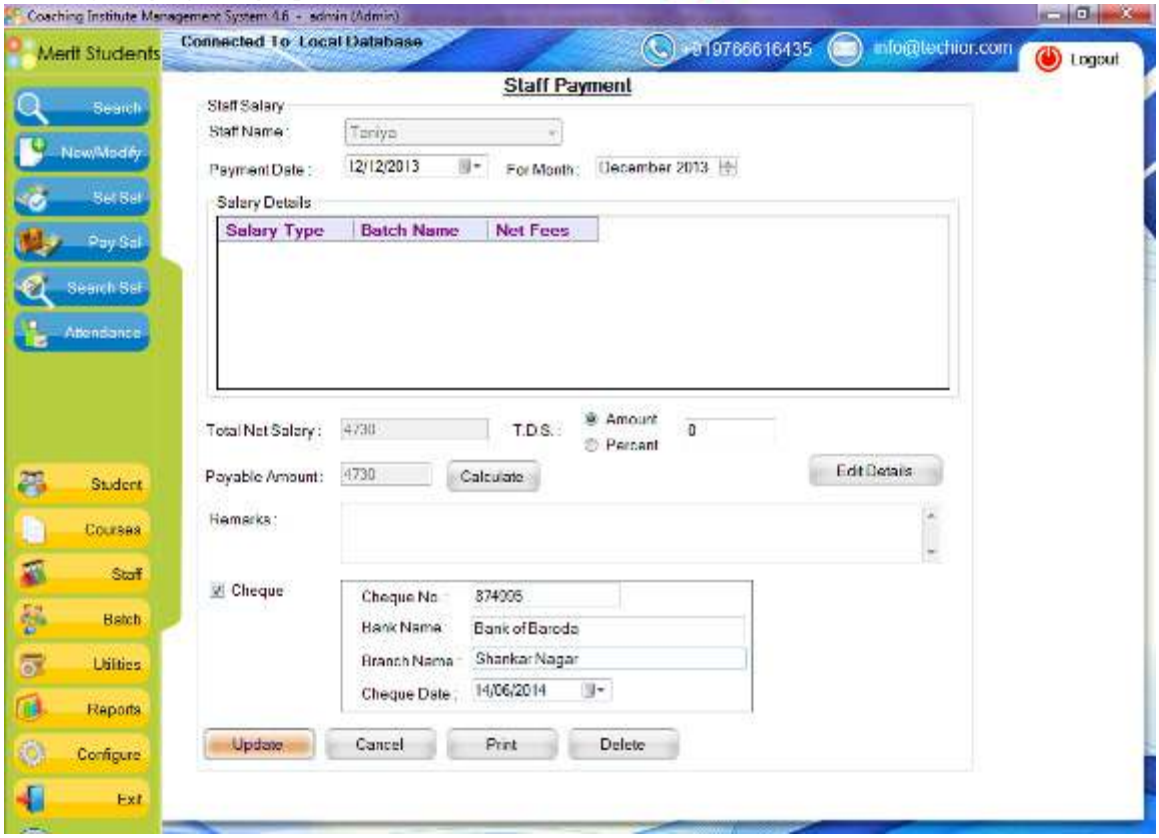


To view and edit the details of the salary paid to a trainer; double click on the payment entry above to open the salary payment window as shown below:

Trainer Payment Preview



If the trainer is having fixed salary, the salary can be updated by clicking on Edit Details in the form as shown below:



When clicked on Edit details following form will open where the user can update the salary details. Click on update & the salary details will get update.

Staff Fixed Salary

Staff Name : **Taniya**

Month : December Year : 2013

Fixed Salary

Basic Salary :	6500	Payble Amount :	6500
H.R.A. :	0	Deduction against advance salary :	0
C.C.A.	0	Deduction for being absent :	100
Conveyance :	0		
Special Allowance :	0		

Deduction :

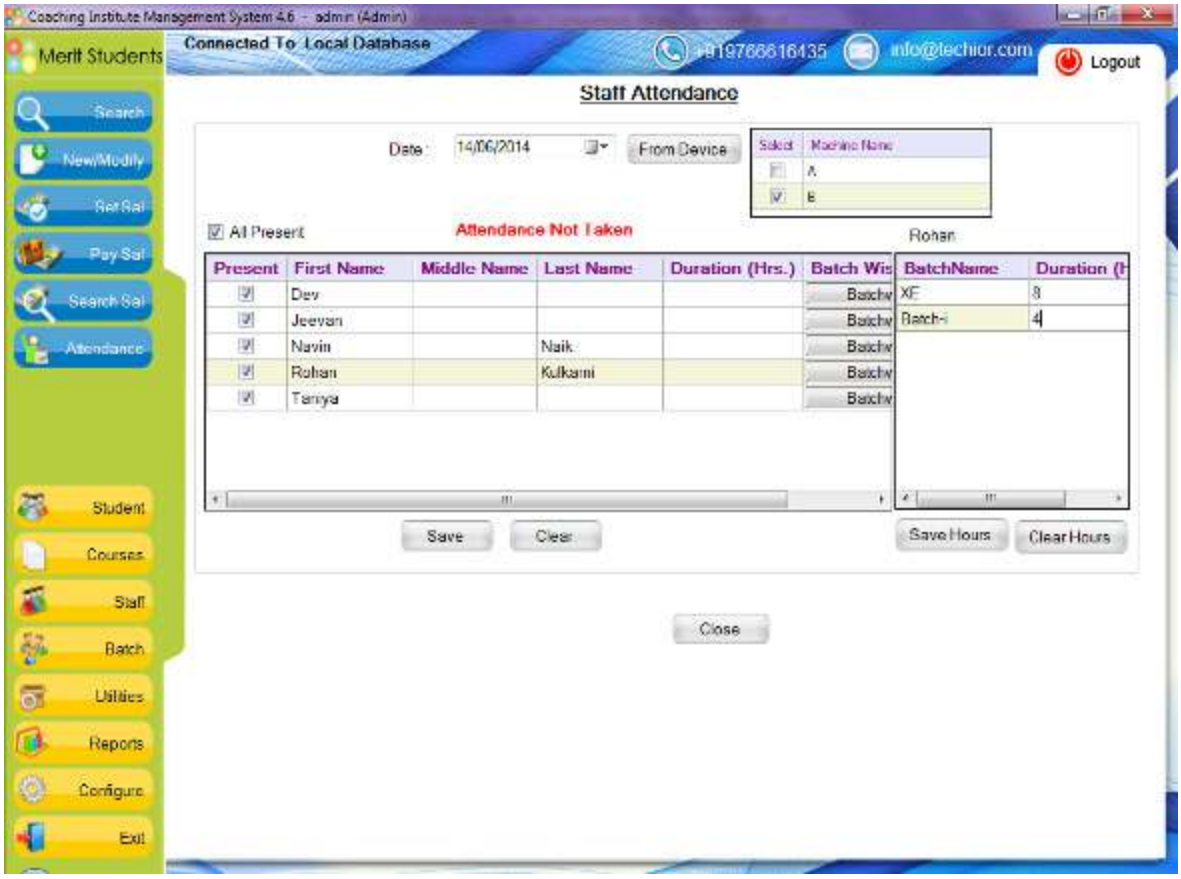
P.T.	175	175
P.F.	10.5%	682.5
E.S.I.C.	12.5%	812.5
OtherDeduction	0	0
Total		1670

Net Total : 4730 Calculate

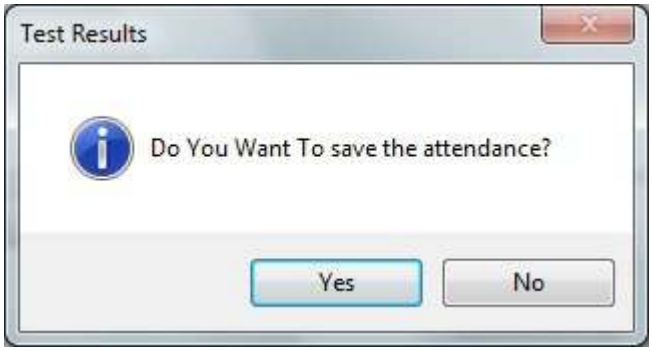
Update Cancel

Attendance (Trainer Attendance)

To take attendance of trainer(s), select "**Staff**" from bottom left menu and then select "**Attendance**" from top left menu to open the trainer attendance window:
Attendance can also be taken from finger print device, select the machine name from which attendance is to be imported & then click on From device,attendance will get imported & then click on save.



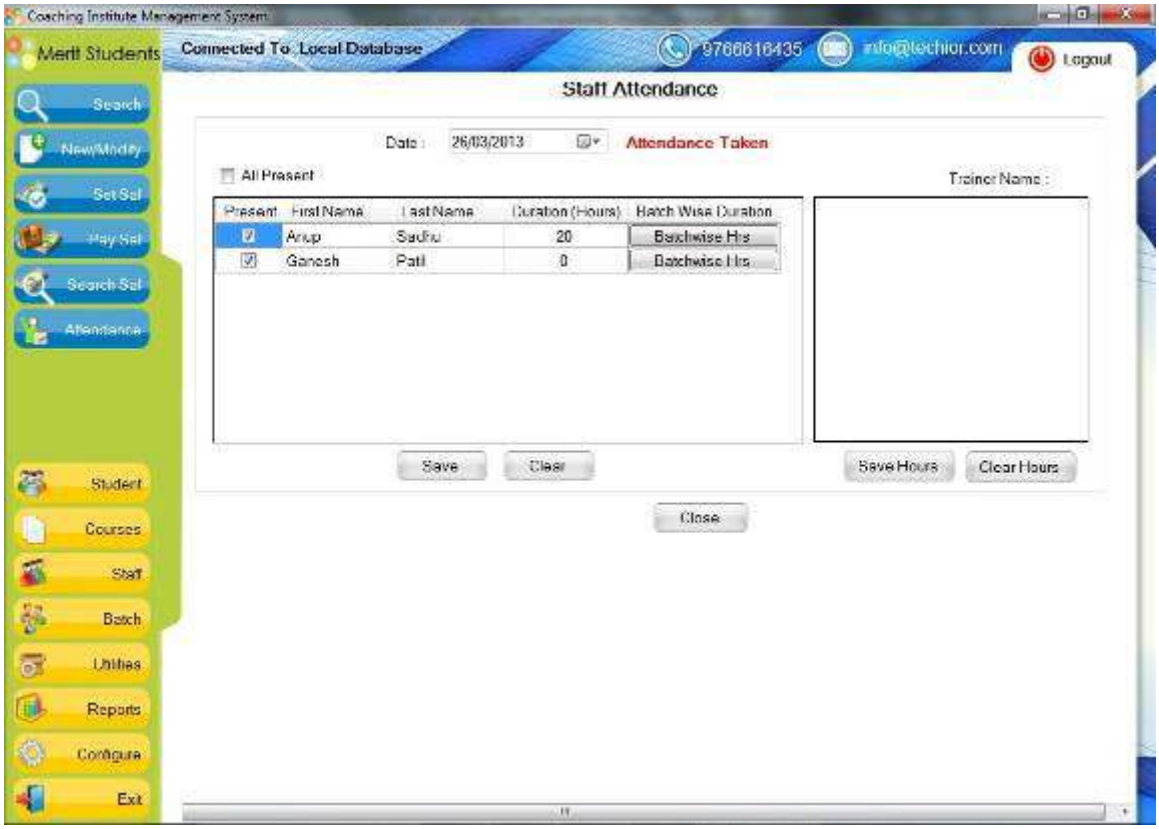
Now choose the date for which attendance is to be taken, tick the checkbox for "**Present**" for the respective trainer, and enter No. of Hours in "**Batchwise Hrs**" window, click "**Save Hours**" and click on "**Save**". Following confirmation window will open:



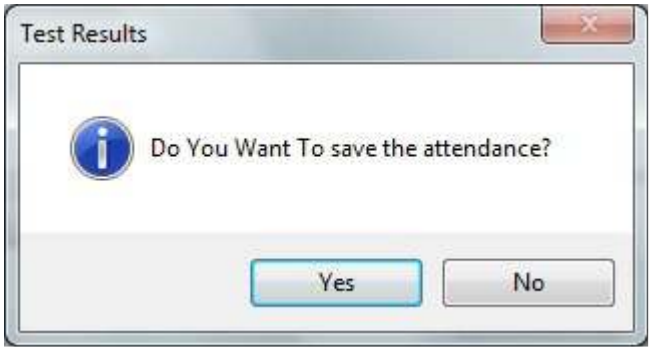
Click “No” if you don’t want to save attendance, else click “Yes” to save the attendance.

Update Attendance (Trainer Attendance)

To update attendance of trainer(s), select “**Trainer**” from bottom left menu and then select “**Attendance**” from top left menu. Now choose the date for which attendance was taken to see the attendance data :



Make the necessary changes and click on "Update". A confirmation window pops-up:



Click "Yes" to update the attendance. Click "No" if you don't want to change attendance.

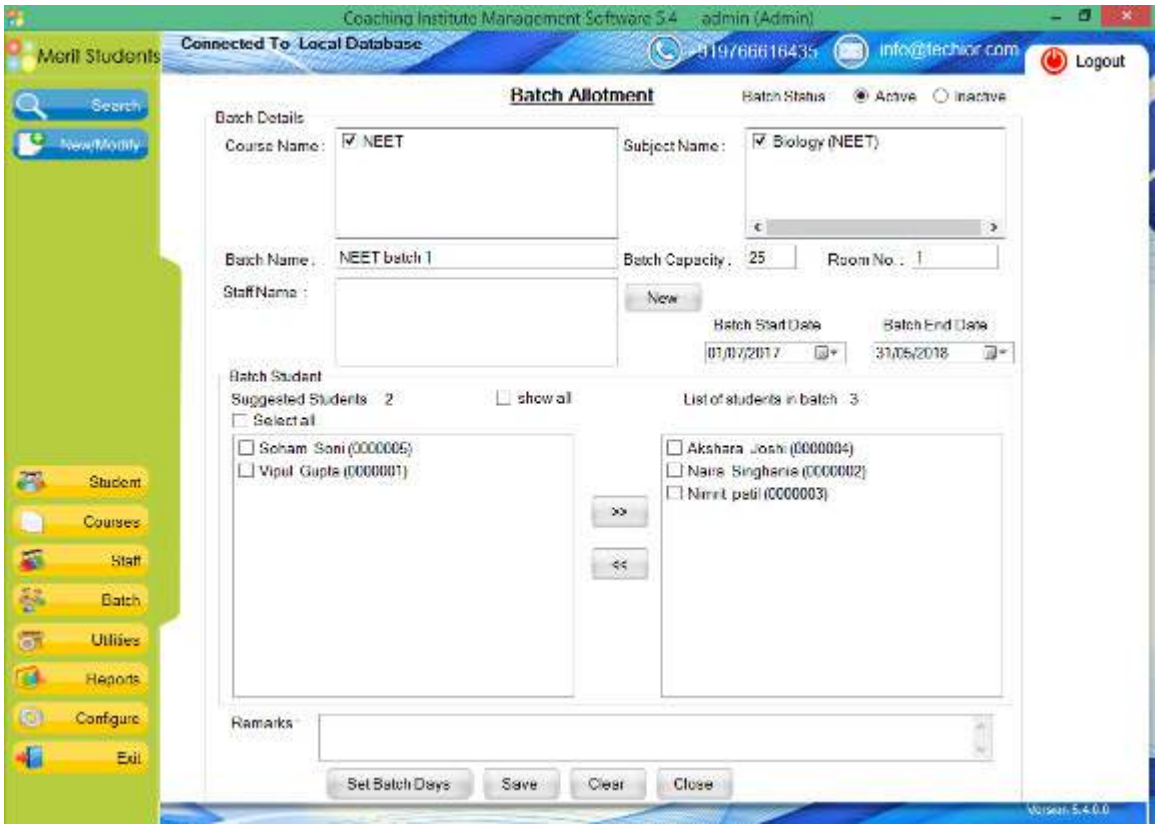
Note: No. of Hours (Duration) in Attendance will be taken into account in Hourly Payment.

Batch Module

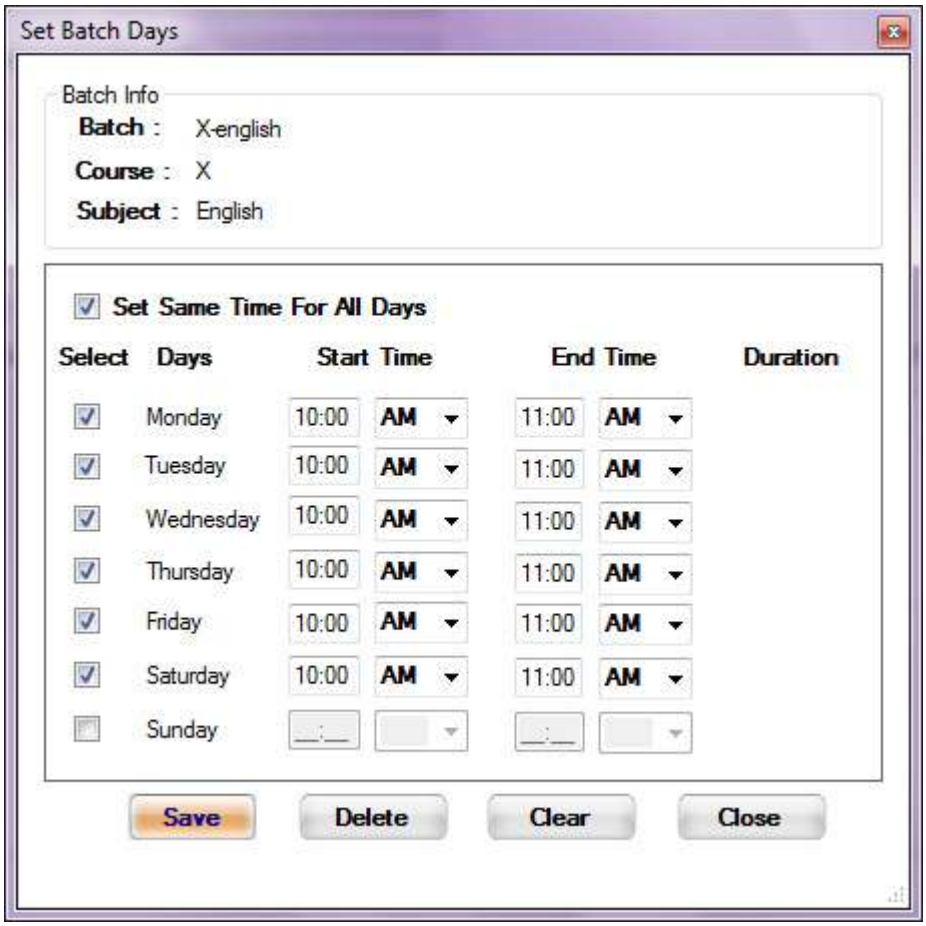
In this module, batches are created for multiple course & multiple subject. The batch details like the duration of the batch, the time of the batch and the trainer who will teach the batch can be selected while creating the batch. The form automatically presents a list of students who have enquired for the selected course and subject. You can select the students and use the arrow (>>) key to add the students to the batch.

You can make batch active or inactive by selecting radio button beside them, it is useful when duration of your batch is over then you can mark that batch as inactive batch for course.

You can also set start date & end date of the batch. It is useful if you want to go back & check the information for when the batch started & ended.



Open a batch in update mode to create a batch timetable. Click on “Set Batch Days” to open Batch Timetable (Set Batch Days) window as shown below:



Now enter "**Start time**" and "**End Time**" for Monday or any other week day. If you want to apply the same time for rest of the days, click the checkbox "**Set Same Time for All Days**" and then tick the check boxes for the specific days to apply the same time for those days, else add timing separately for the rest of the days.

Choose "**Delete**", if you want to delete the schedule created.

Choose "**Clear**", if you want to clear the current values and keep the above window open.

To view a consolidated report of all the batches created, go to "**Reports**" and click on "**Time Table**" from the left side menu. You can also view this report by clicking on "**Show Batch Time Table**" from the Batch Search Page.

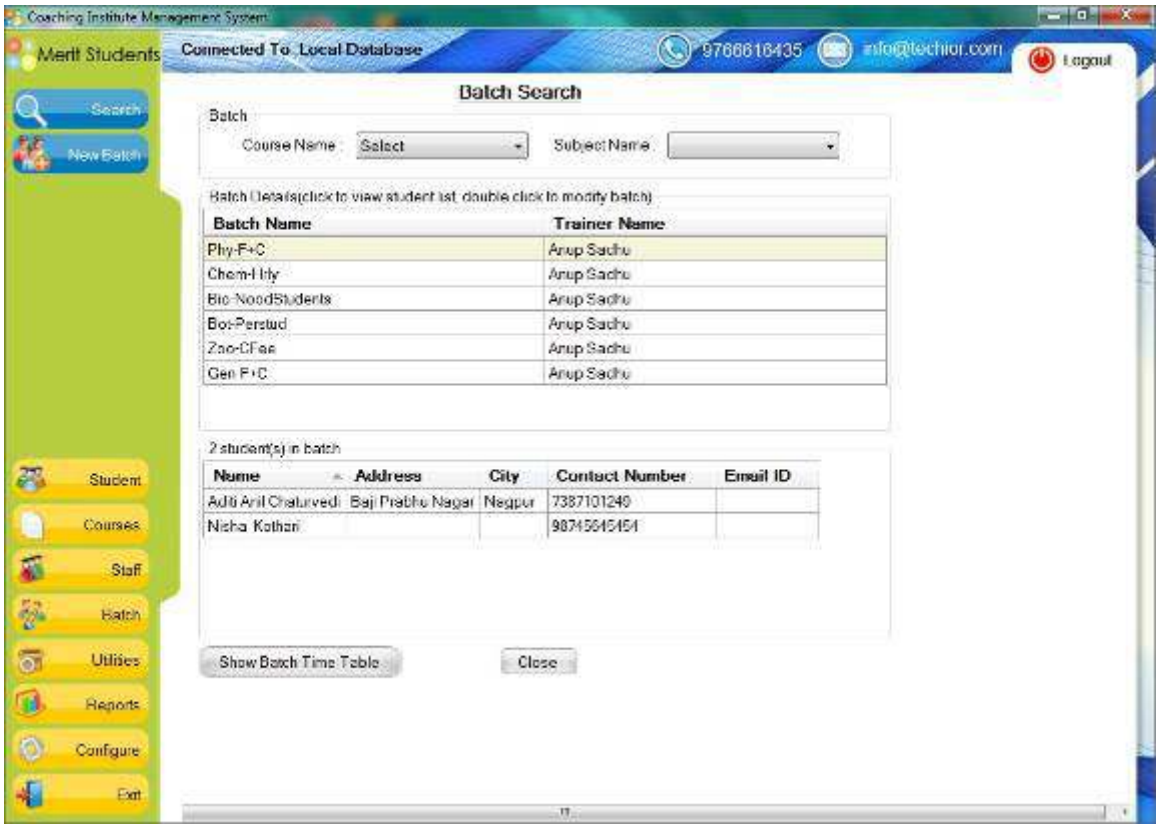
Show Batch Time Table

Batch Time Table

Time	Mon	Tue	Wed	Thu	Fri	Sat	Sun
04:00 AM-04:30 AM	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3students	Science/Salary Slab/Anup Sadhu/22 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- -English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students
04:30 AM-05:00 AM	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3students	Science/Salary Slab/Anup Sadhu/22 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- -English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students
05:00 AM-05:30 AM	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3students	Science/Salary Slab/Anup Sadhu/22 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- -English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students
05:30 AM-06:00 AM	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3students	Science/Salary Slab/Anup Sadhu/22 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- -English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students	Science/Salary Slab/Anup Sadhu/22 students ---------- English/Fixed/Anup Sadhu/3 students

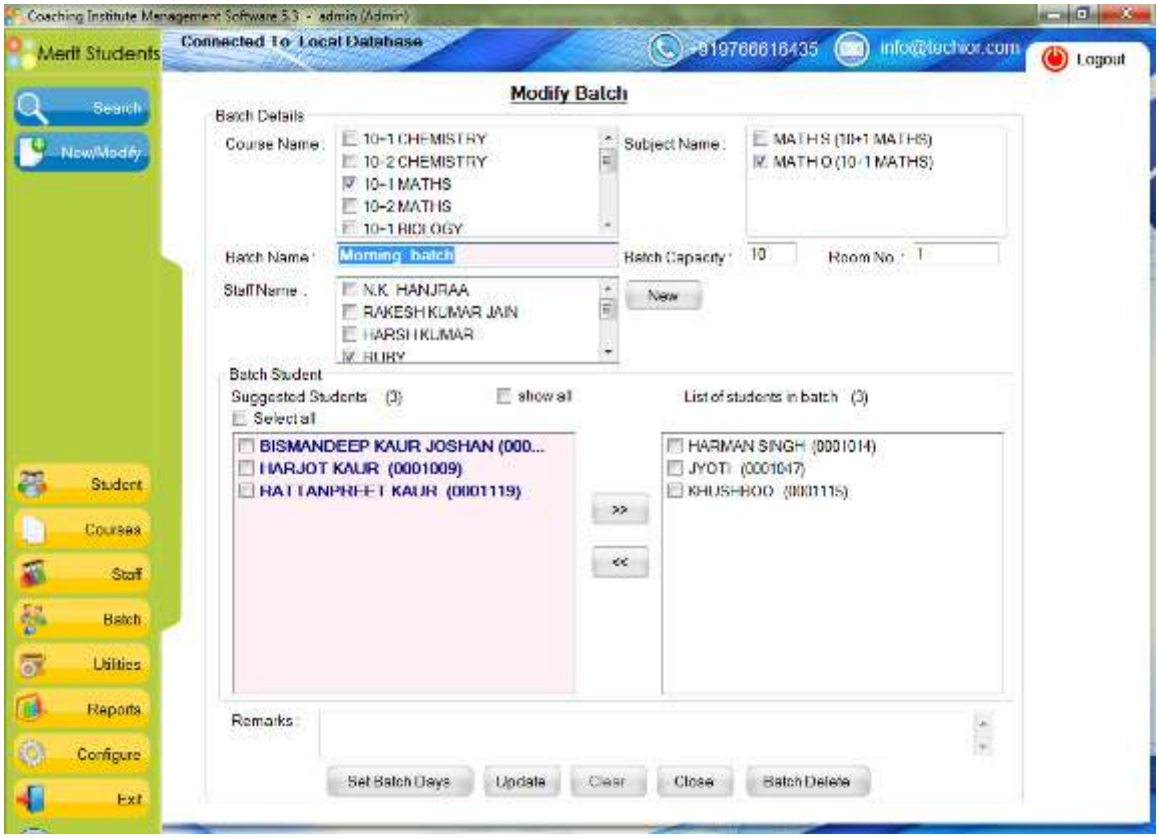
Search Batch

There is a “Search” form using which you can search for batches available for a particular course and subject. Select the course name and the subject name. It gives the list of batches for the selected course and subject.



Click on any one of the batches to show the list of students registered in the batch.

Update Batch



The form will automatically present a list of students who have enquired for the selected course and subject and a list of students who are already in the current batch. You can select the students from Suggested Students List and use the arrow (>>) key to add the students to the batch.
You can remove a student from a batch by selecting the student from the student list on the right and use the arrow (<<) key to move the student to the Suggested Students box on the left. Once necessary changes are done, click on "**Update**" to update the changes.

Reports Module

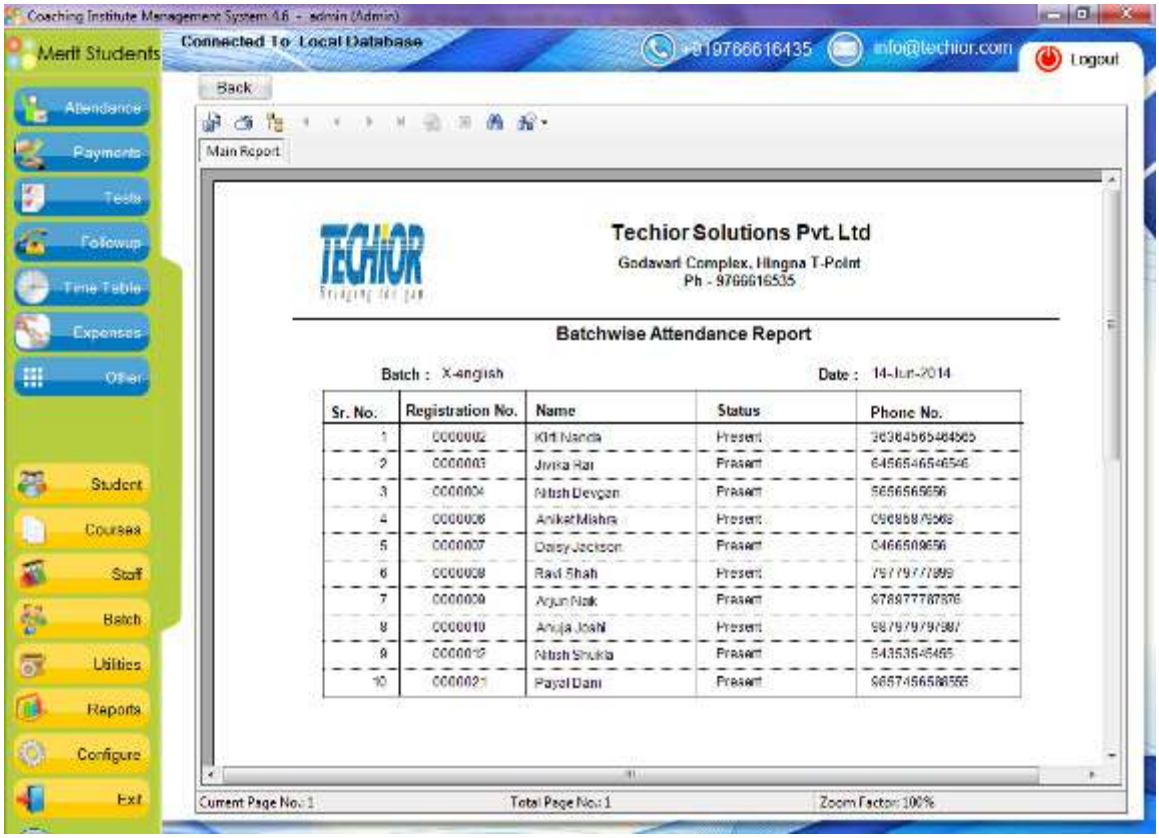
This module is used to generate reports which help in the analysis of batch performance and attendance. The attendance and marks of the students can be sent to parents. The management / owners of the institute can get reports about payments received, outstanding payments, etc. There are many reports available on the follow-up calls that are made.
Along with the student report, staff attendance & payment related reports can also be generated in order to maintain the staff's record.

There are different categories of reports available in this module:

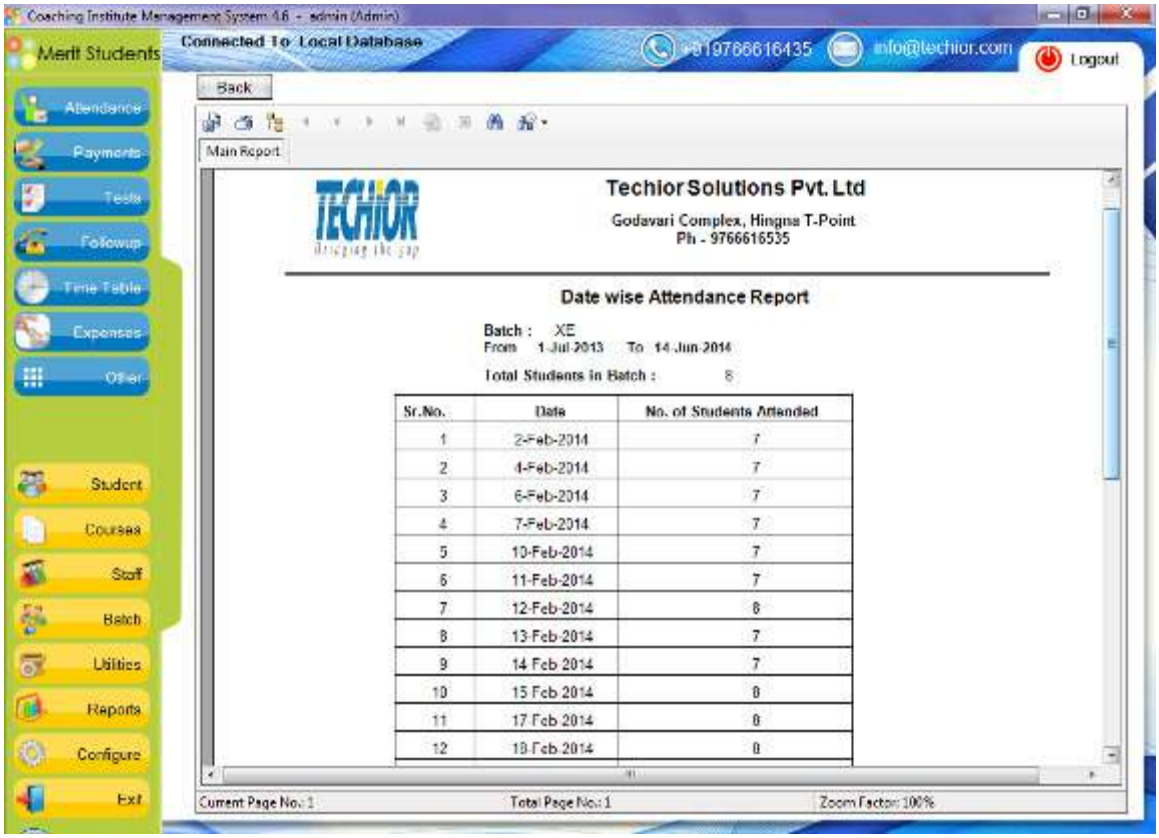
a. Attendance
b. Payments
c. Tests
d. Follow-up
e. Timetable
f. Expenses
g. Other
    1. Issue items
    2. SMS log
    3. Enquiry source
    4. Documents
    5. Student Birthday
    6. Staff birthday
    7. Library
    8. Date wise enquiry
    9. Date wise registrations
    10. Course wise registrations
    11. Enquiry to registrations

Attendance Reports: Under this category, the reports available are:

Batch Wise Attendance Report: Select the batch and the date for which you want to see the attendance. It shows which students of the selected batch were present on the selected date.

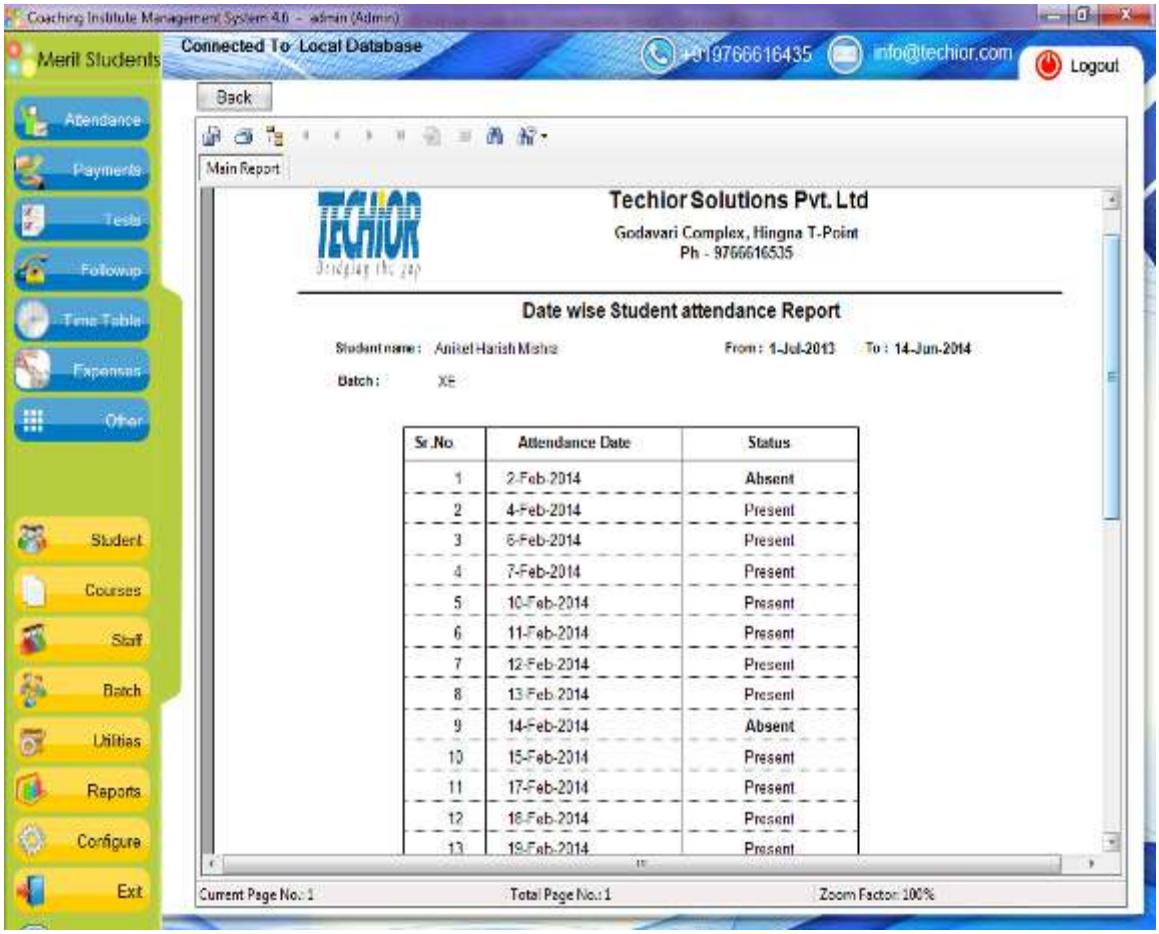


Date Wise Attendance Report:
This report is useful to see how the attendance of a particular batch has been for a period of time. Select the batch and the “From” and “To” dates for which you want to monitor the attendance and press “View” to see the report.



Sr.No.	Date	No. of Students Attended
1	2-Feb-2014	7
2	4-Feb-2014	7
3	6-Feb-2014	7
4	7-Feb-2014	7
5	10-Feb-2014	7
6	11-Feb-2014	7
7	12-Feb-2014	8
8	13-Feb-2014	7
9	14-Feb-2014	7
10	15-Feb-2014	8
11	17-Feb-2014	8
12	18-Feb-2014	8

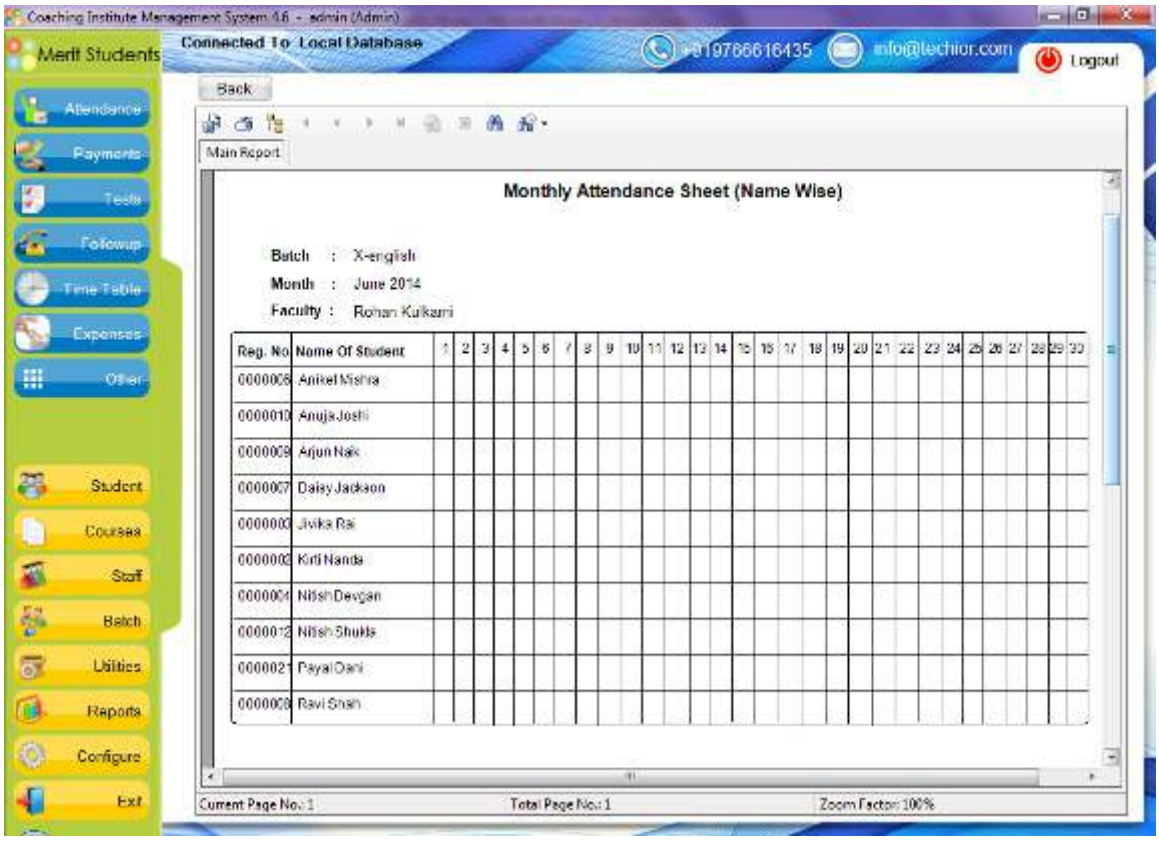
Student Attendance Report: This report is used to see the attendance of a particular student for a selected period of time. Select the batch, the Student Name and the “From” and “To” dates for which you want to monitor the attendance and press “View” to see the report.



Sr.No	Attendance Date	Status
1	2-Feb-2014	Absent
2	4-Feb-2014	Present
3	6-Feb-2014	Present
4	7-Feb-2014	Present
5	10-Feb-2014	Present
6	11-Feb-2014	Present
7	12-Feb-2014	Present
8	13-Feb-2014	Present
9	14-Feb-2014	Absent
10	15-Feb-2014	Present
11	17-Feb-2014	Present
12	18-Feb-2014	Present
13	19-Feb-2014	Present

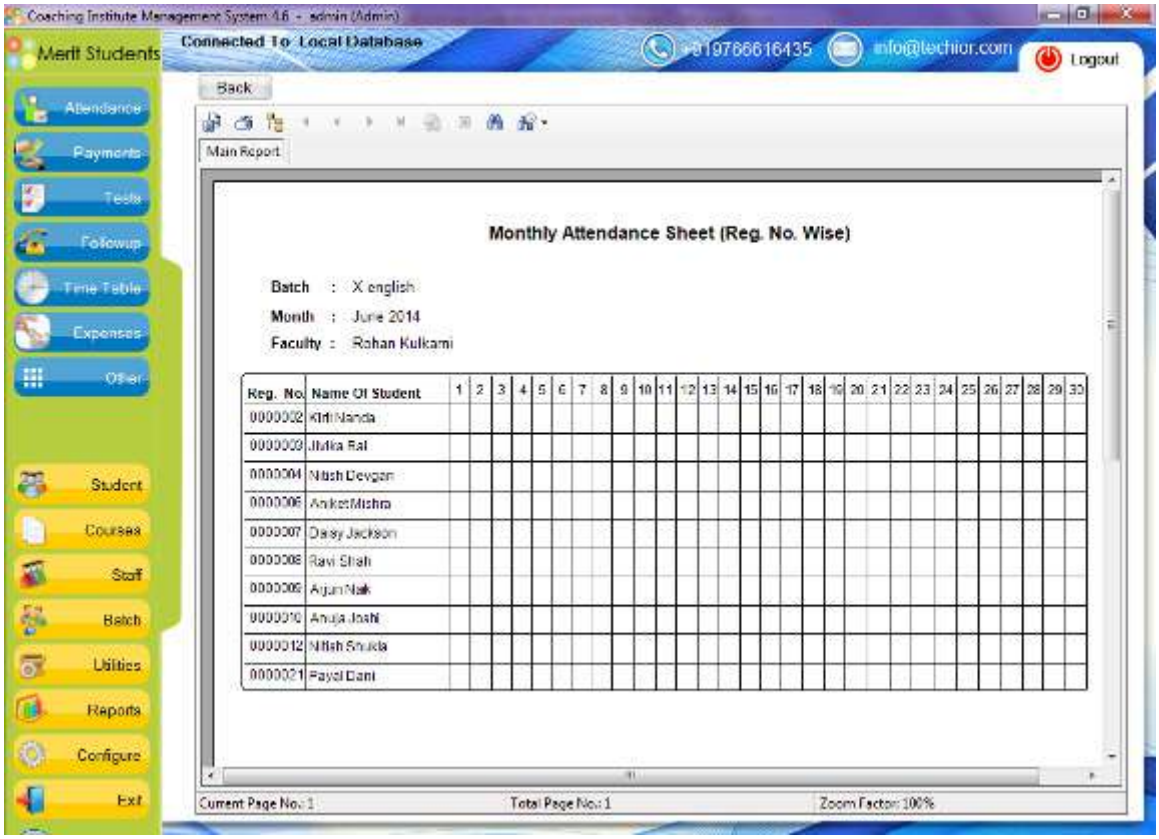
Blank Monthly Attendance Sheet (Name wise)

This is used to create a single page printout which can be used to take the attendance of a batch for a month. Select the batch and the month and press "View" to create the attendance sheet. Then print the sheet and use it to mark the attendance of the students in class. The data from this sheet can be fed into the system later.



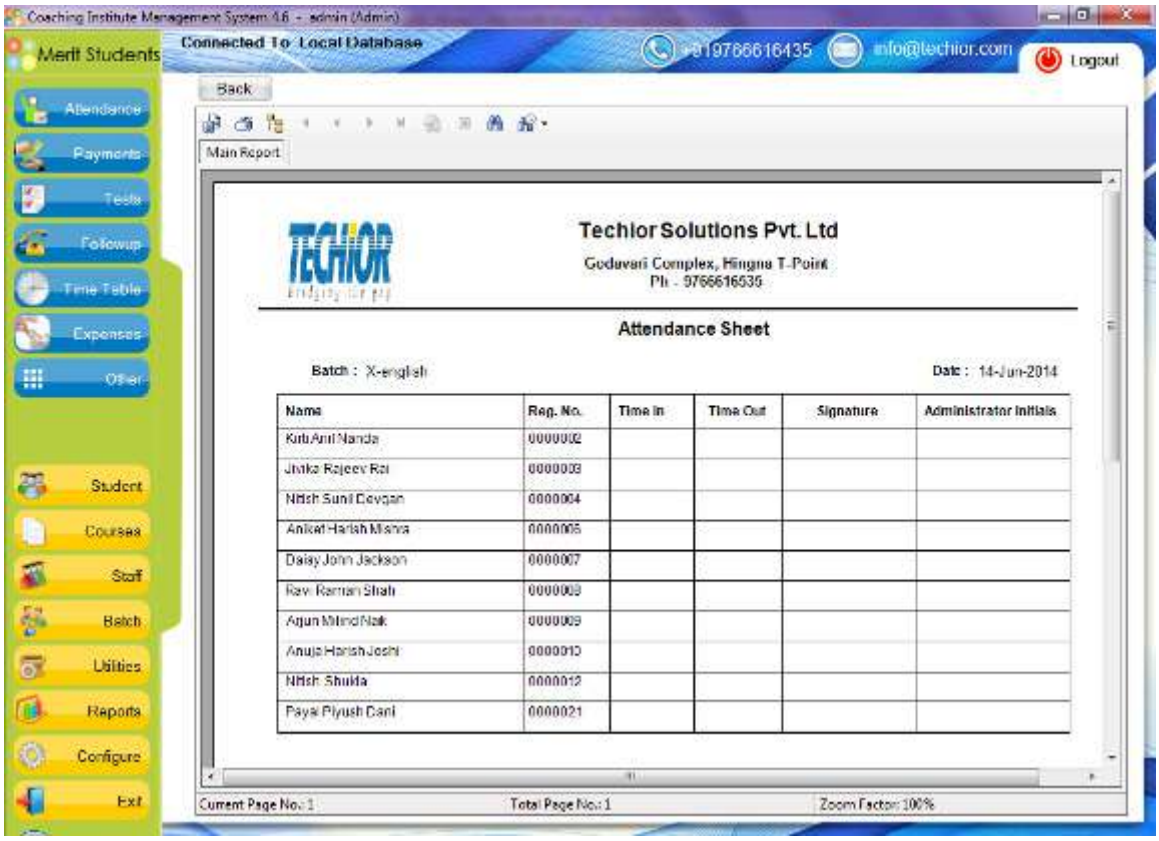
Blank Monthly Attendance Sheet (Reg. No. wise)

This is used to create a single page printout which can be used to take the attendance of a batch for a month. Select the batch and the month and press "View" to create the attendance sheet. Then print the sheet and use it to mark the attendance of the students in class. The data from this sheet can be fed into the system later.

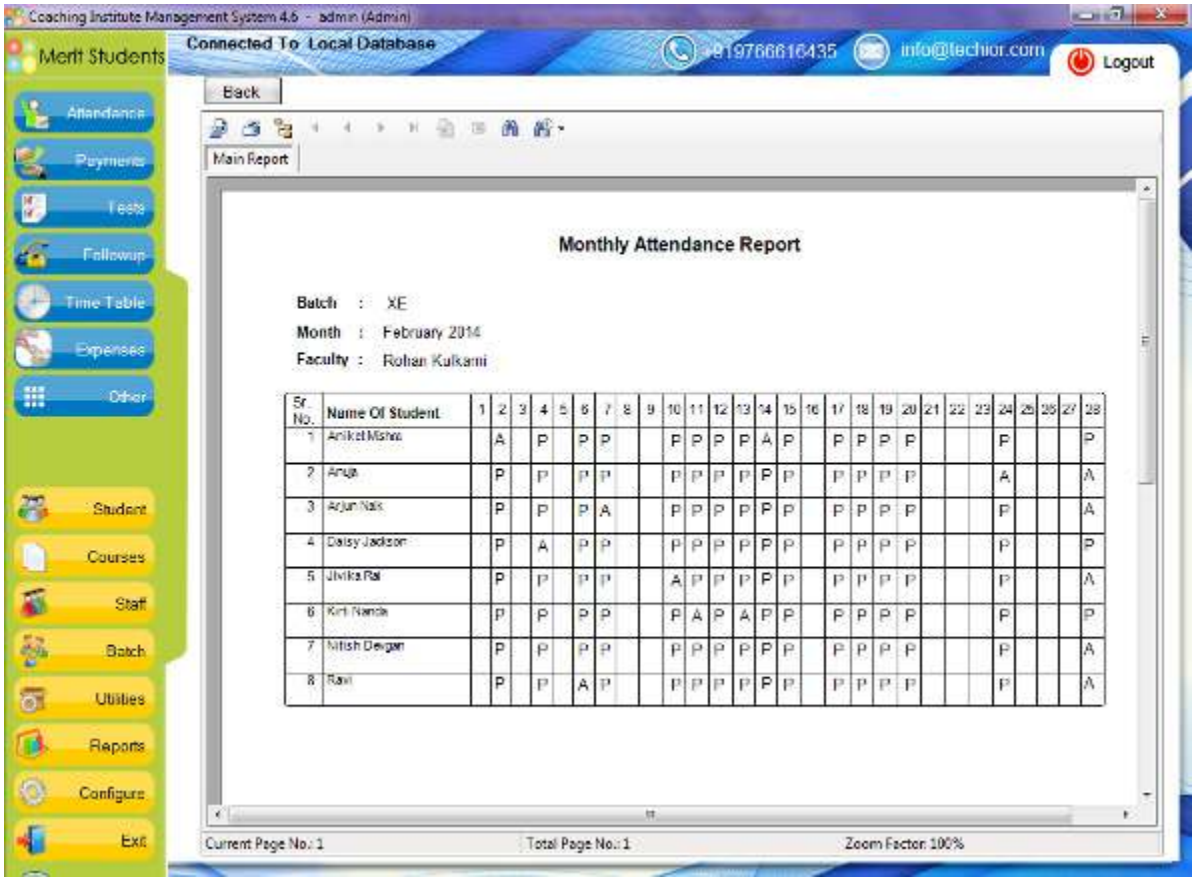


Blank Attendance Sheet:

Here the blank attendance sheet is generated, in which Time in, Time out & Signature can be entered along with the Administrator initials.



Monthly Attendance Report: This report is used to view attendance of all the students of a respective batch for a specific month.

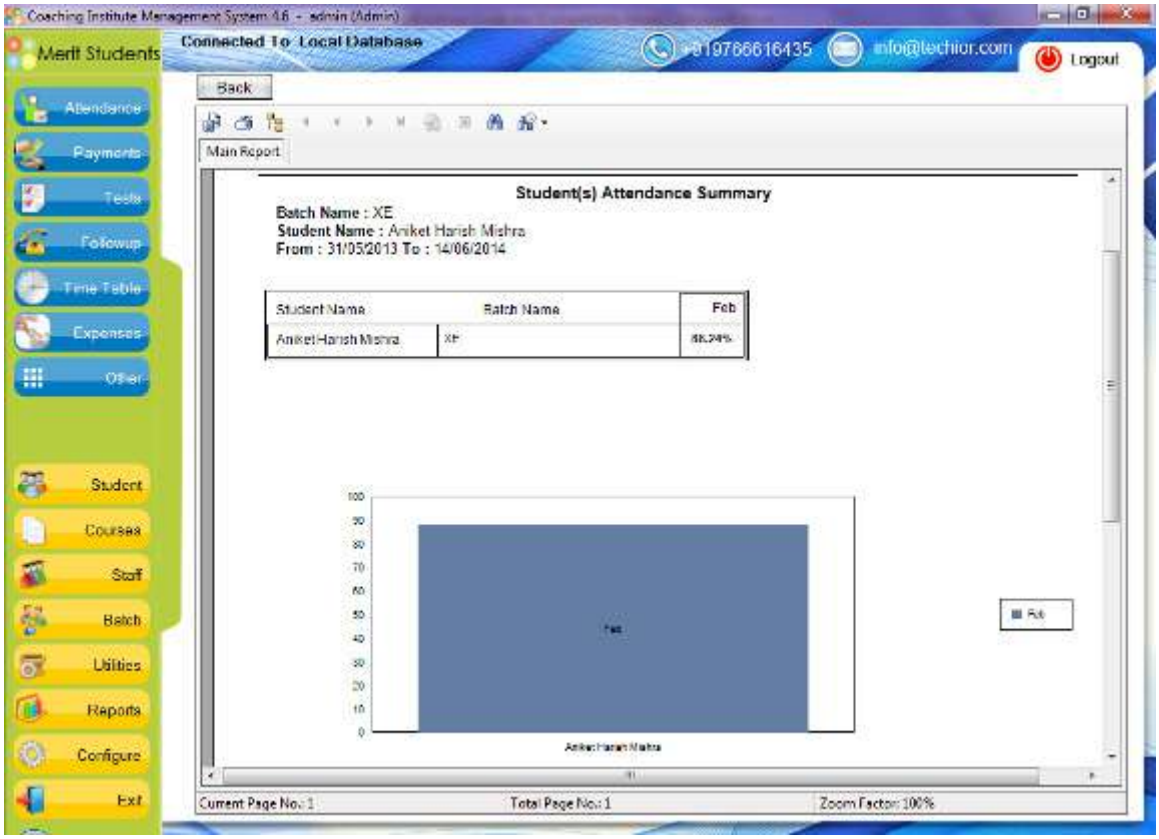


Sr. No.	Name Of Student	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
1	Aniket Mishra		A		P		P	P			P	P	P	P	A	P		P	P	P	P				P				P
2	Anuja		P		P		P	P			P	P	P	P	P	P		P	P	P	P				A				A
3	Arjun Naik		P		P		P	A			P	P	P	P	P	P		P	P	P	P				P				A
4	Daisy Jackson		P		A		P	P			P	P	P	P	P	P		P	P	P	P				P				P
5	Jivika Rai		P		P		P	P			A	P	P	P	P	P		P	P	P	P				P				A
6	Kirti Nanda		P		P		P	P			P	A	P	A	P	P		P	P	P	P				P				P
7	Nitish Devgan		P		P		P	P			P	P	P	P	P	P		P	P	P	P				P				A
8	Ravi		P		P		A	P			P	P	P	P	P	P		P	P	P	P				P				A

Student Attendance Timings: Here it will show the timings at which student has marked his/her attendance in fingerprint/face detection machine & accordingly calculate total time for which student is present.

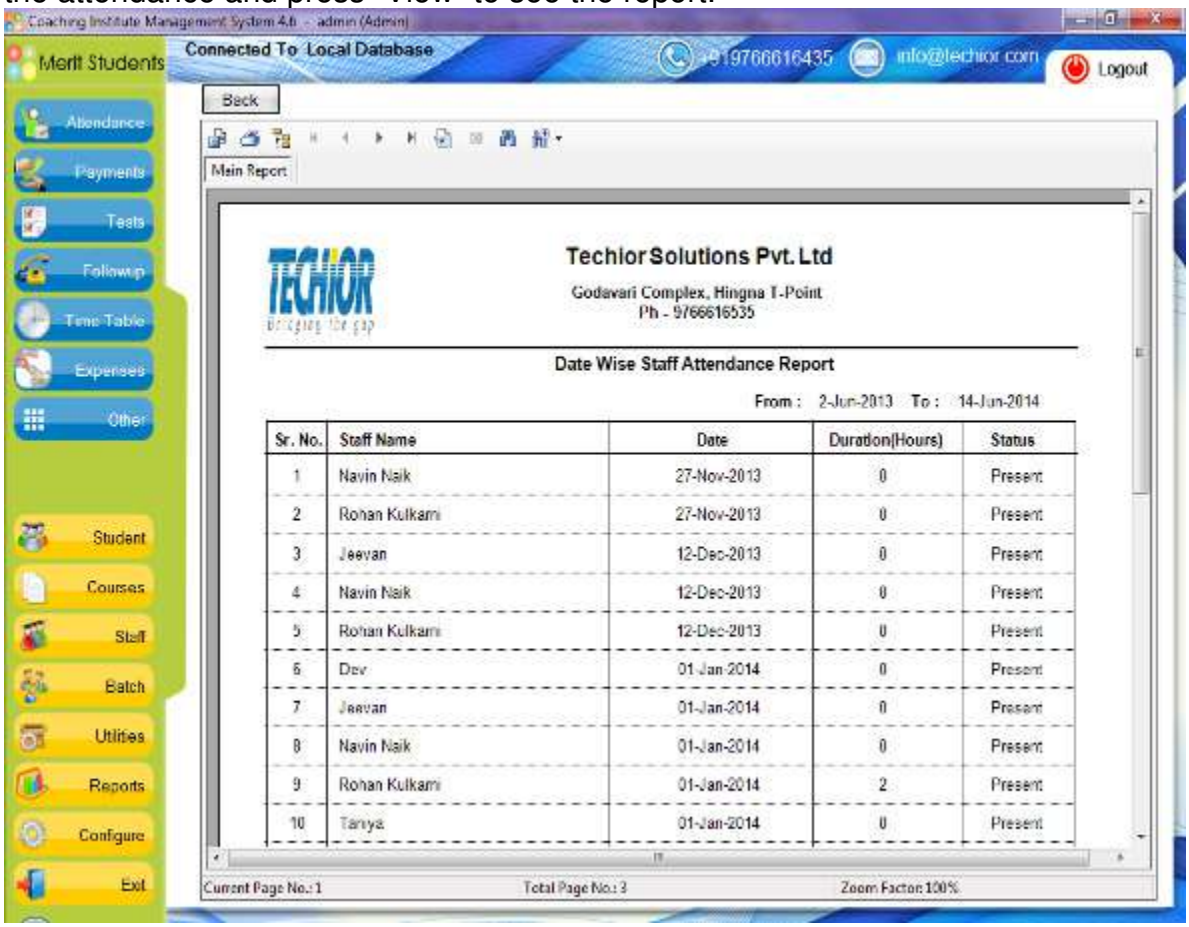
Sr. No.	Reg. No	Student Name	Date	In Time	Out Time	Total Time
1	0000007	Daisy Jackson	6-Jun-2014	10.12 am		0.00 hrs
2	0000003	Jivika Rai	6-Jun-2014	9.47 am		0.00 hrs
3	0000004	Nitish Devgan	6 Jun 2014	9.58 am		0.00 hrs
4	0000007	Daisy Jackson	7-Jun-2014	10.02 am		0.00 hrs
5	0000003	Jivika Rai	7-Jun-2014	9.50 am		0.00 hrs
6	0000002	Kirti Nanda	7-Jun-2014	10.02 am		0.00 hrs

Student attendance summary: This report will show student attendance summary for particular batch.



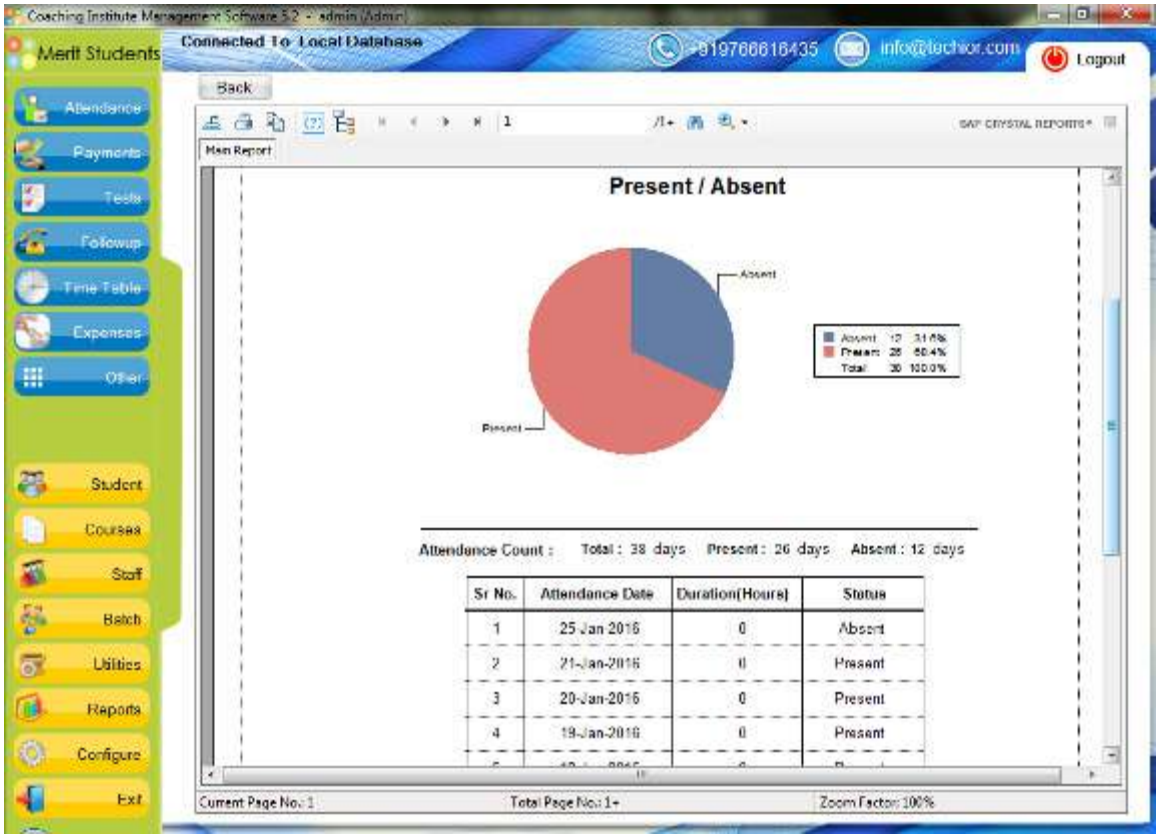
Staff attendance reports:

Date Wise Attendance Report:
This report is useful to see how the attendance of a particular staff has been for a period of time. Select the “From” and “To” dates for which you want to monitor the attendance and press “View” to see the report.

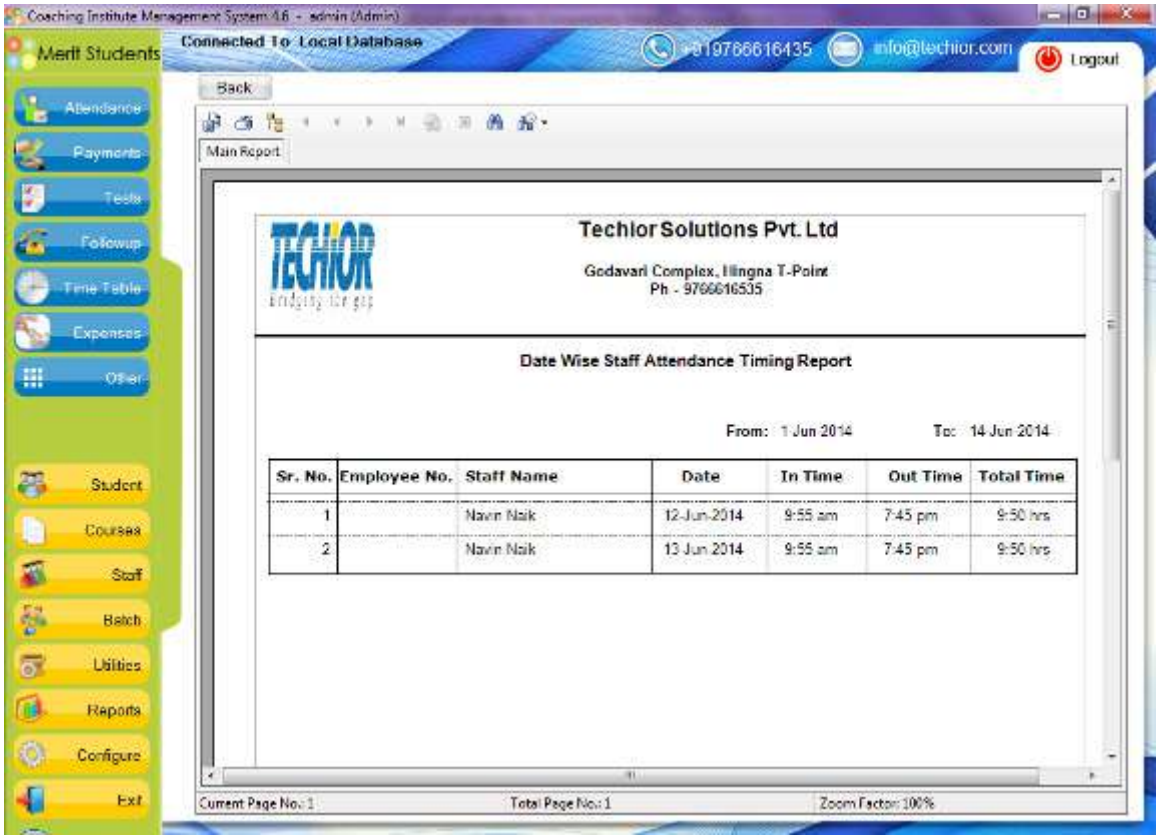


Sr. No.	Staff Name	Date	Duration(Hours)	Status
1	Navin Naik	27-Nov-2013	0	Present
2	Rohan Kulkarni	27-Nov-2013	0	Present
3	Jeevan	12-Dec-2013	0	Present
4	Navin Naik	12-Dec-2013	0	Present
5	Rohan Kulkarni	12-Dec-2013	0	Present
6	Dev	01-Jan-2014	0	Present
7	Jeevan	01-Jan-2014	0	Present
8	Navin Naik	01-Jan-2014	0	Present
9	Rohan Kulkarni	01-Jan-2014	2	Present
10	Tanya	01-Jan-2014	0	Present

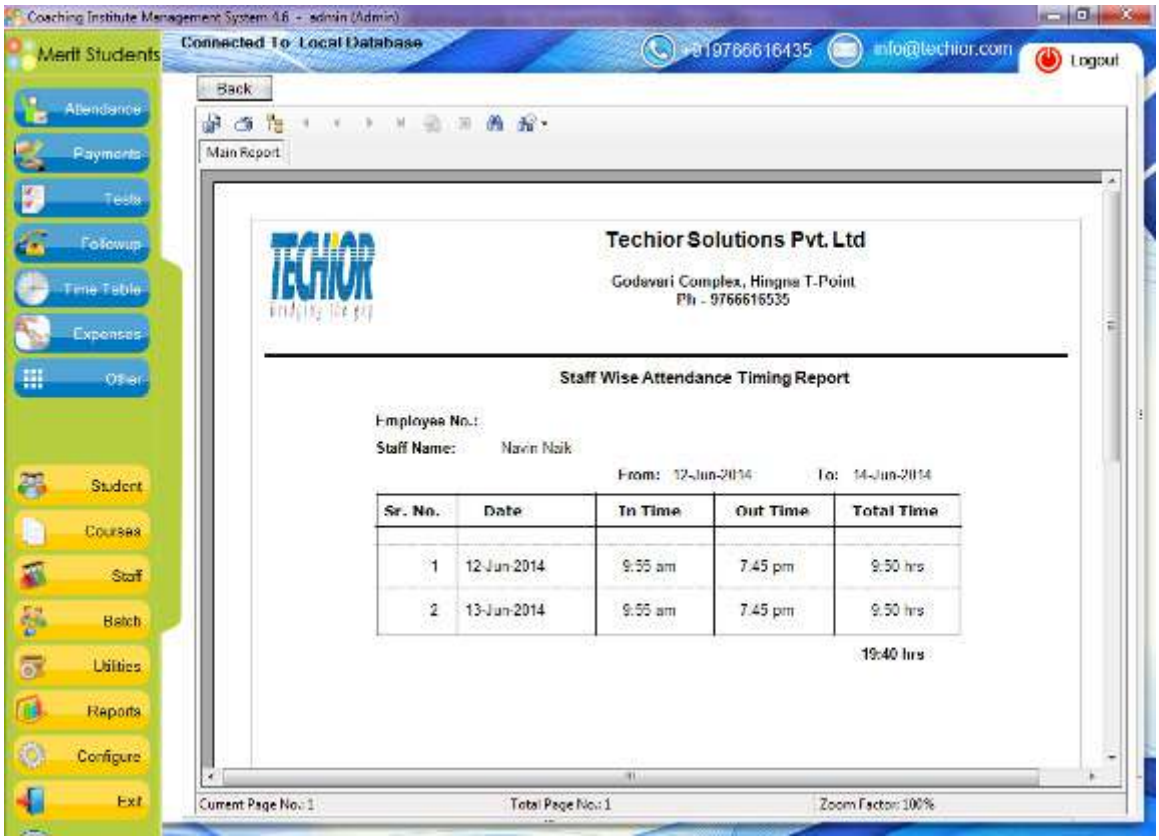
Staff Attendance Report: This report is used to see the attendance of a particular staff for a selected period of time. You can also see the total present and absent count of staff .Select the Staff Name and the “From” and “To” dates for which you want to monitor the attendance and press “View” to see the report.



Date wise attendance timings: Here it will show the date wise timings at which Staff has marked his/her attendance in fingerprint/face detection machine and accordingly calculate total time for which staff is present.



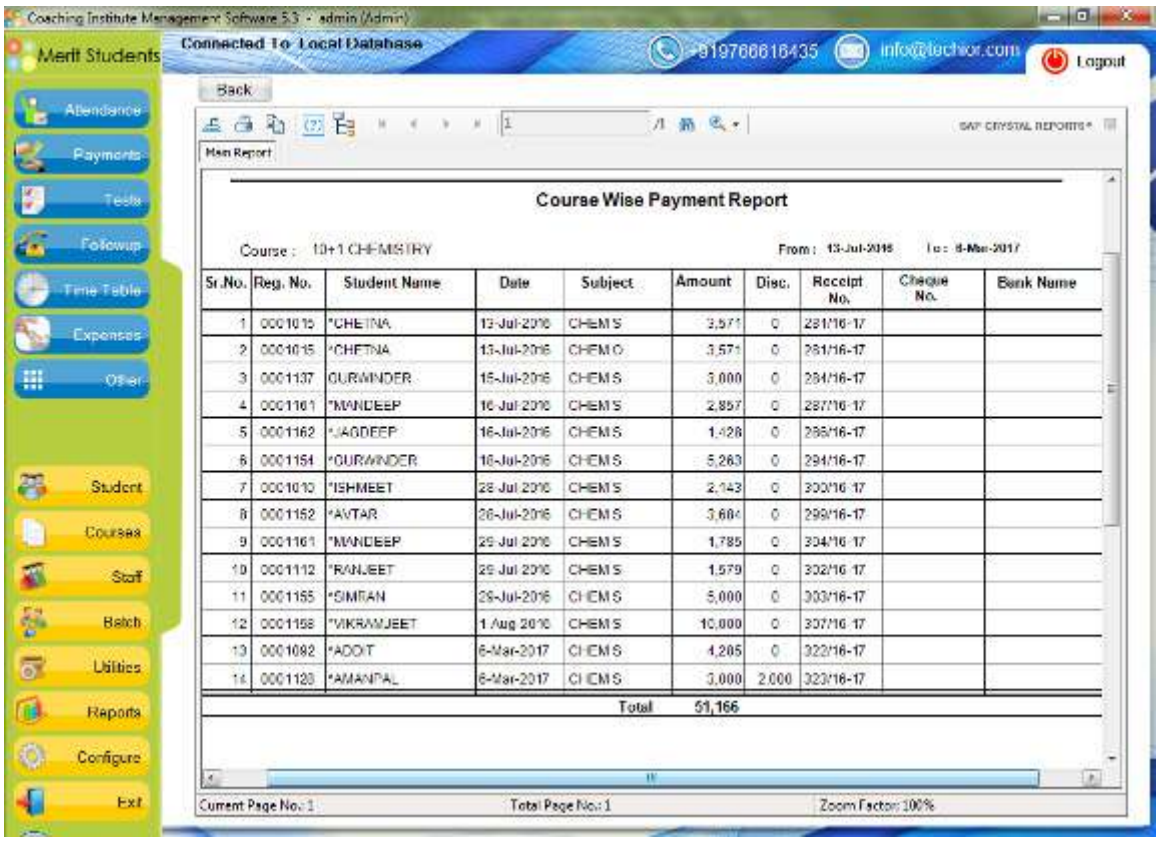
Staff wise attendance timings: This report will show the staff wise timing report at which selected Staff has marked his/her attendance in fingerprint/face detection machine & accordingly will show total time for which staff is present.



Payment Reports: Under this category, the reports available are:

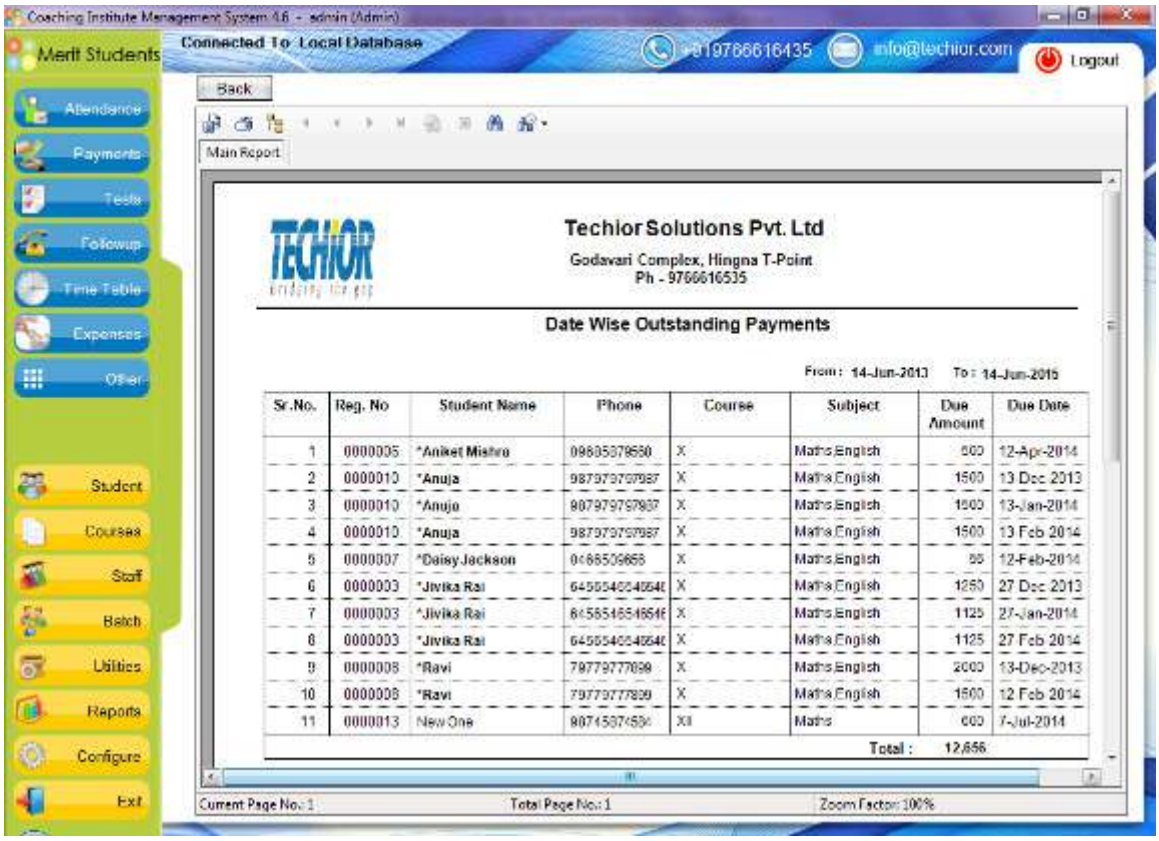
Date Wise Payment Received:

This report gives a list of fees payments which have been received within the specified dates. Select the “From date” and the “To date” and press “View” to see the payments received. The report also shows the total amount collected by Cash and by cheque.



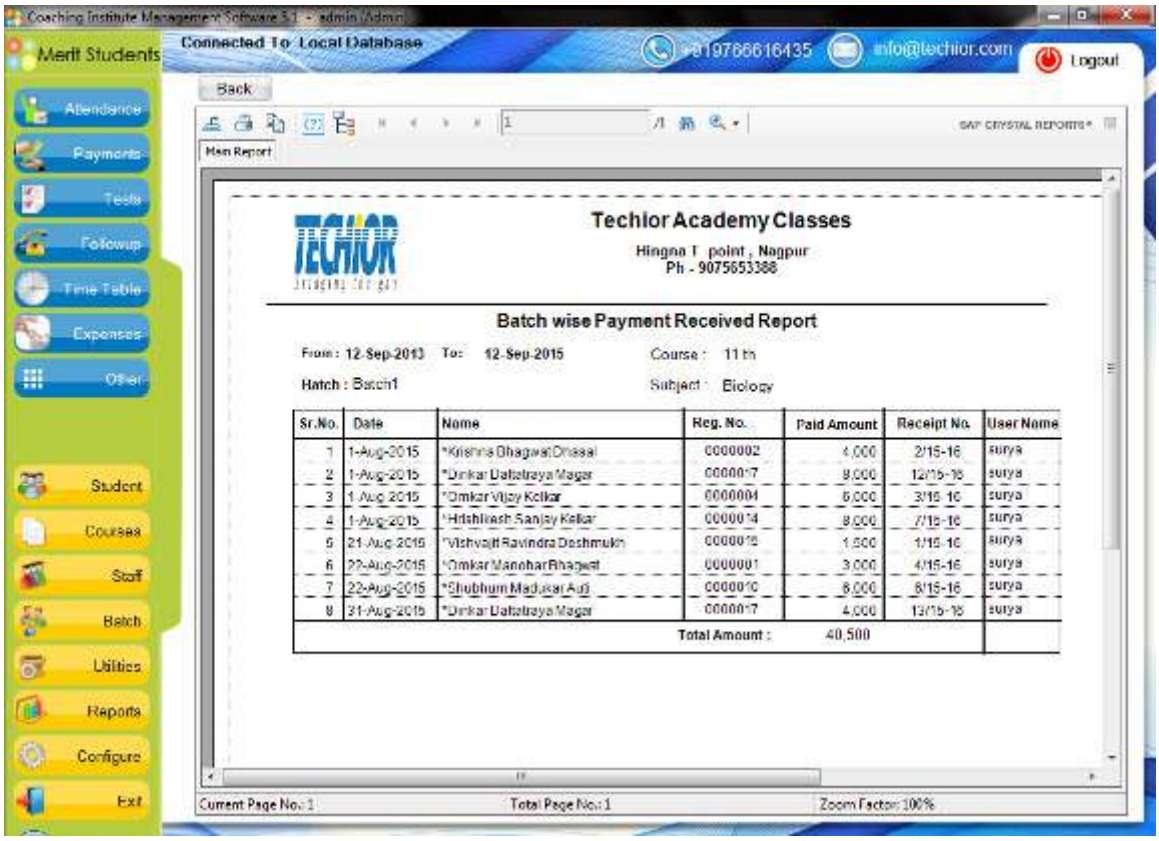
Date Wise Outstanding Payment:

This report gives a list of payments that are outstanding within the specified dates. Select the “From date” and the “To date” and press “View” to see the payments outstanding.



Batch Wise Payment Received:

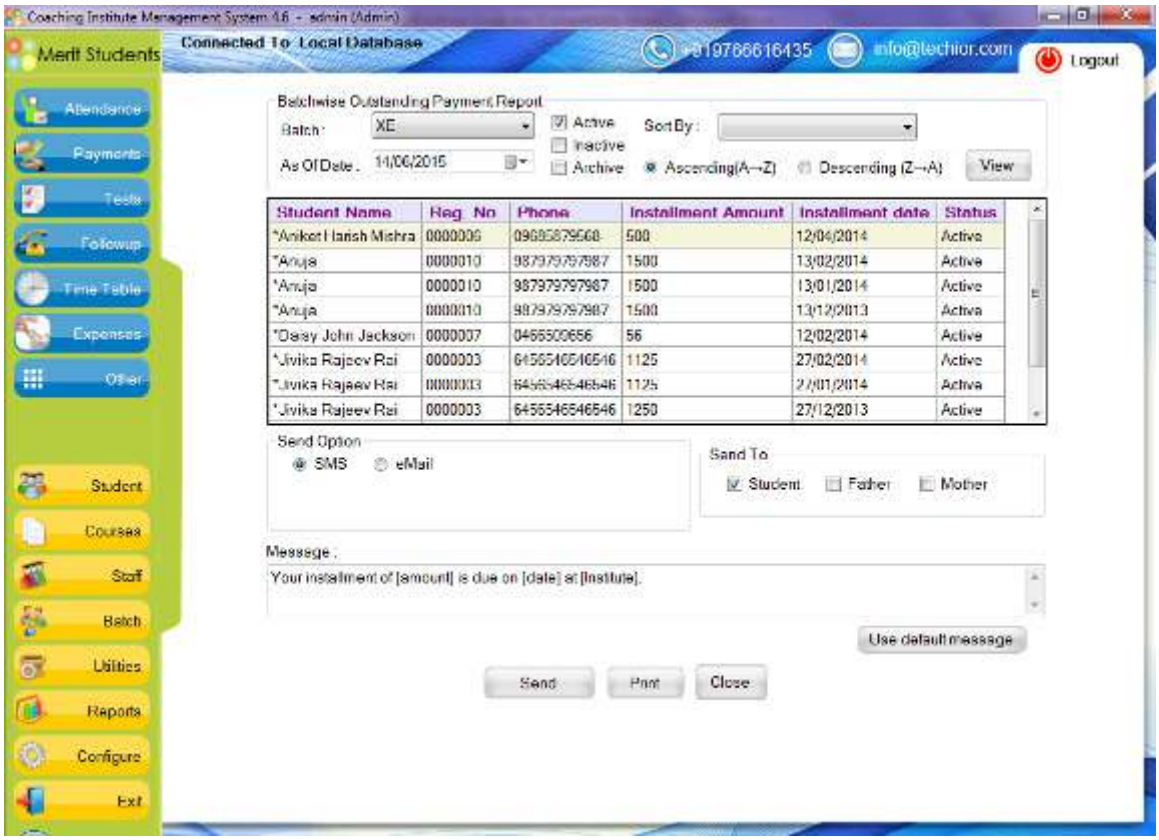
This report gives a list of fees payments which have been received for a particular batch within the specified dates. Select a batch, “From date” and “To date” and press “View” to see the payments received.



Batch Wise Outstanding Payment:

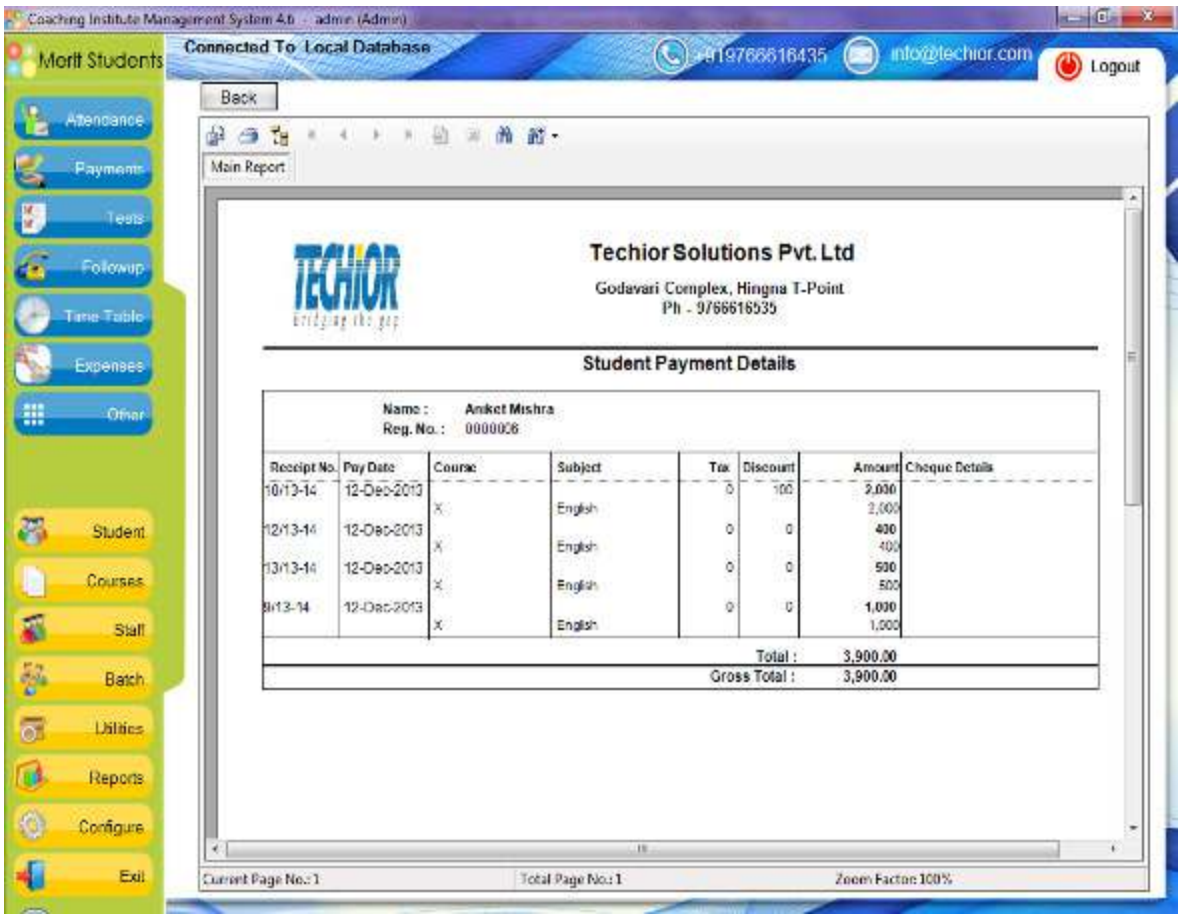
This report gives a list of payments that are outstanding for a particular batch as of a specified date. Select a batch and a date and press “View” to see the payments outstanding for the selected batch as of the specified date.

You can also send SMS or eMail to the students informing them about the amount that is due from this form itself. Just select SMS or eMail option, and type in the message to be sent. By default, a message has been provided which informs the student about the outstanding amount and the due date.



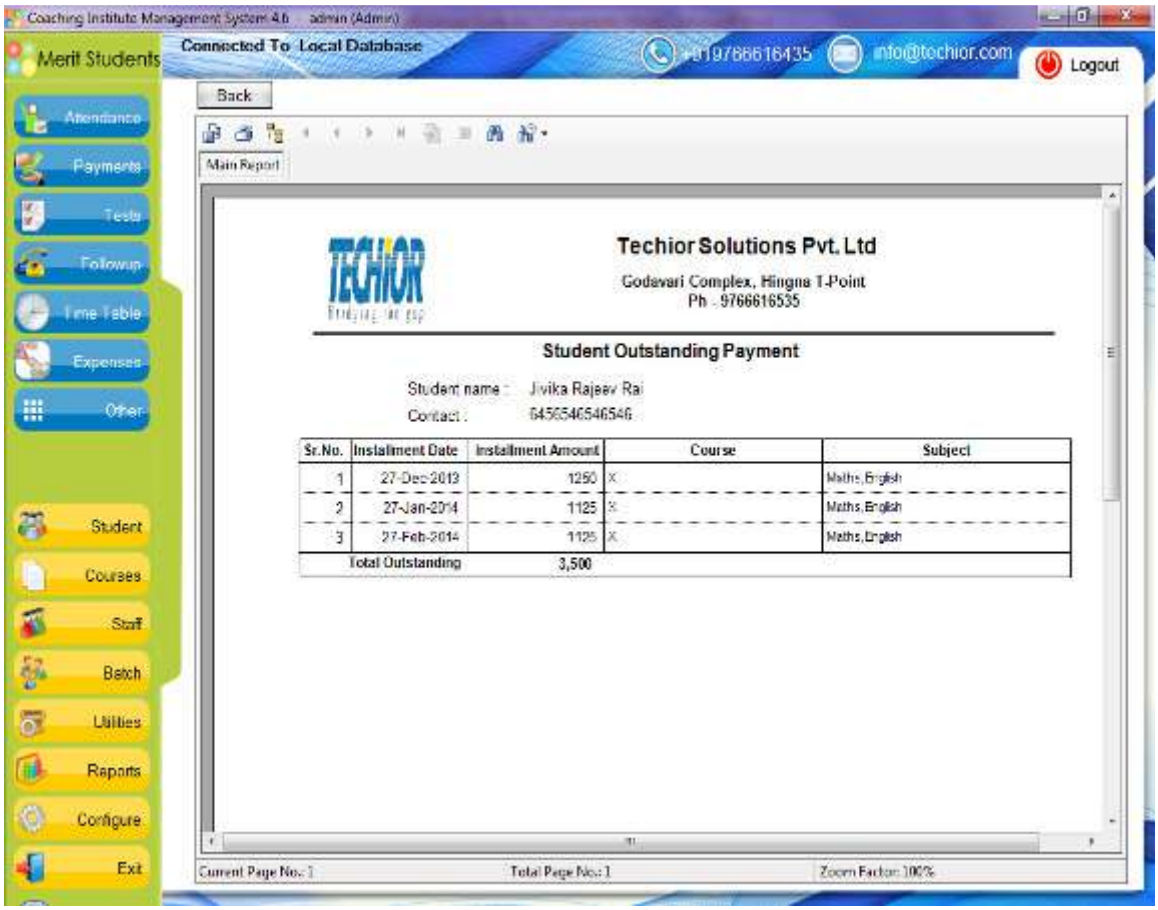
Student Payment Report:

This report gives a list of installment payments made by a particular student up to the current date. Select the student for which the payment report is required and press “View” to the see the report.



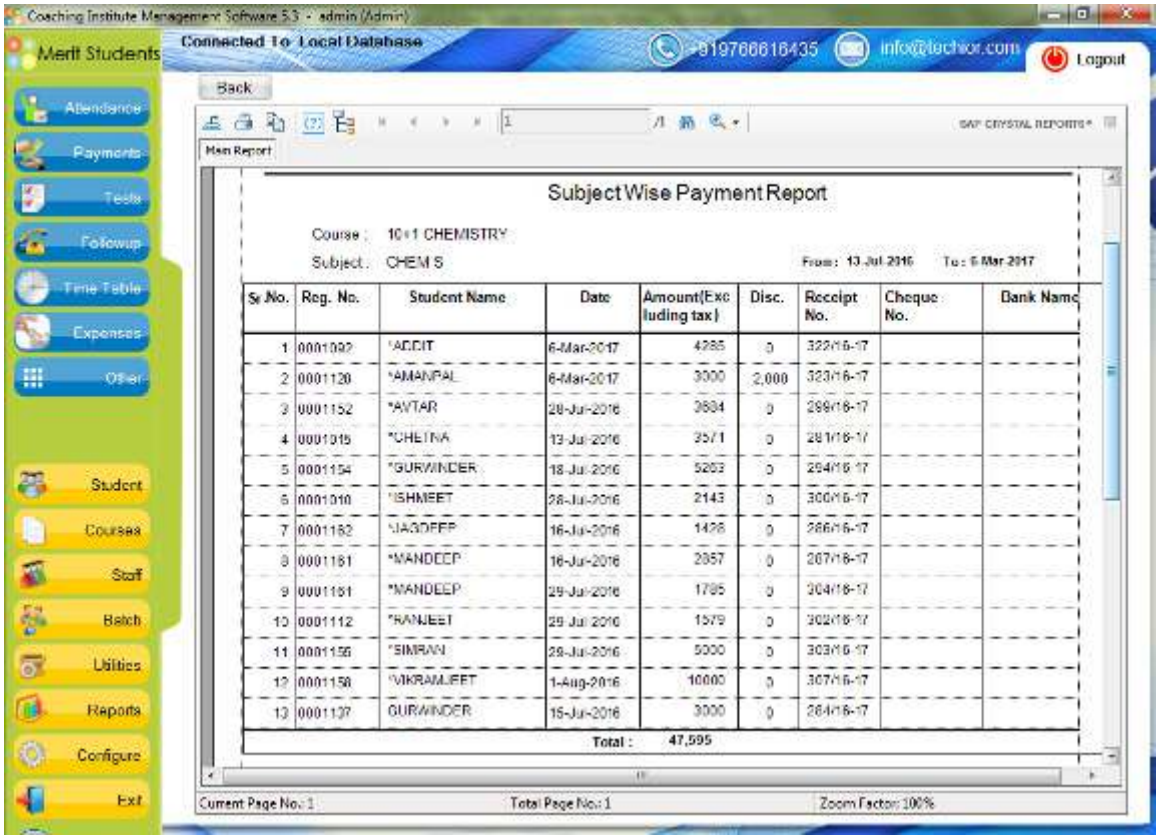
Student Outstanding Payment:

This report gives a list of installment payments that are outstanding for a particular student. Select the student for which the outstanding payment report is required and press “View” to the see the report.



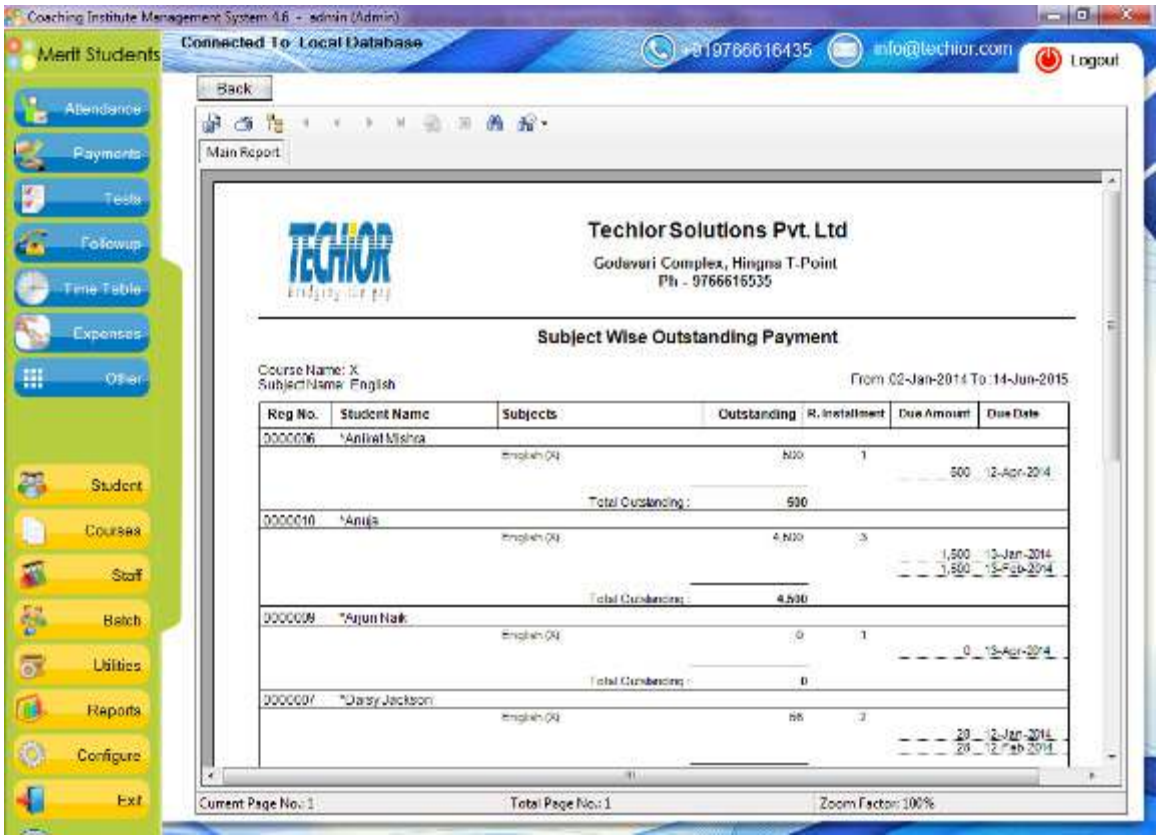
Subject wise Payment Received:

This report gives a list of installment payments received for a particular subject within the specified dates. Select the course, subject, “From date” and “To date” and press “View” to see the payments received.



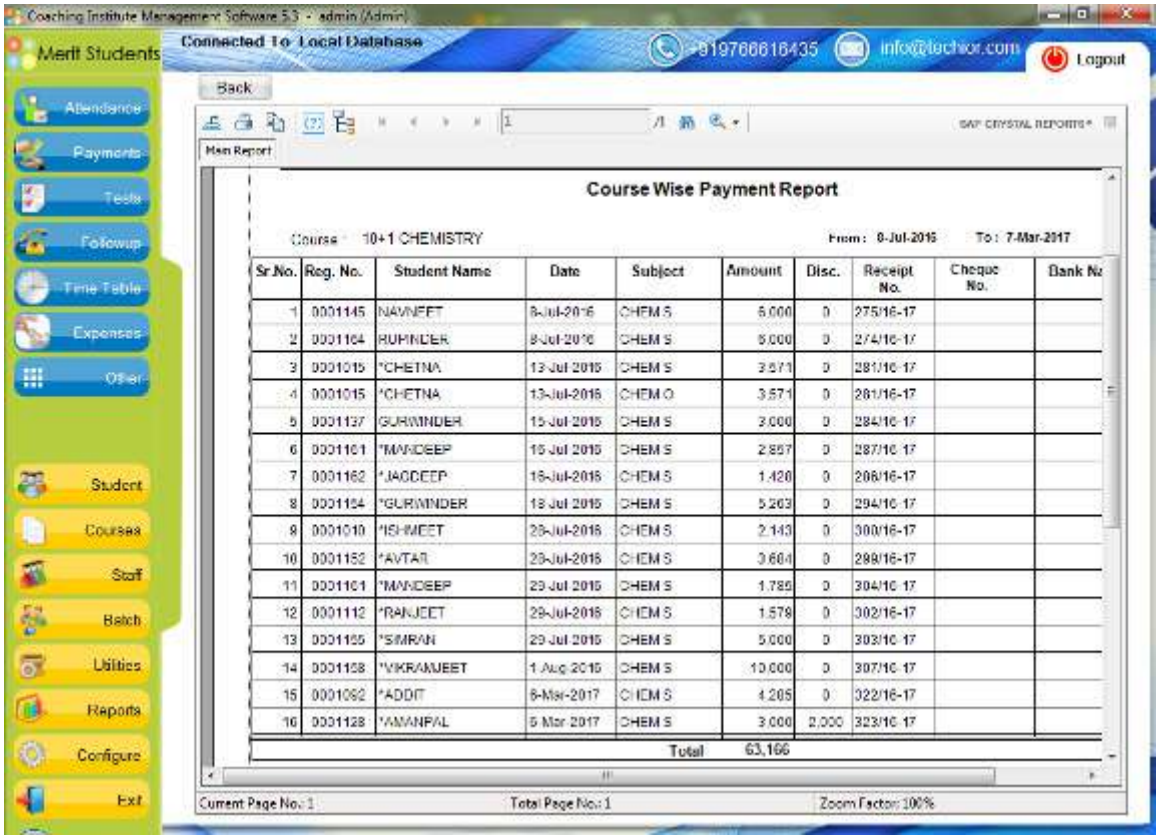
Subject wise Outstanding Payment:

This report gives a list of payments that are outstanding for a particular subject within the specified dates. Select the course, subject, “From date” and “To date” and press “View” to see the payments outstanding.



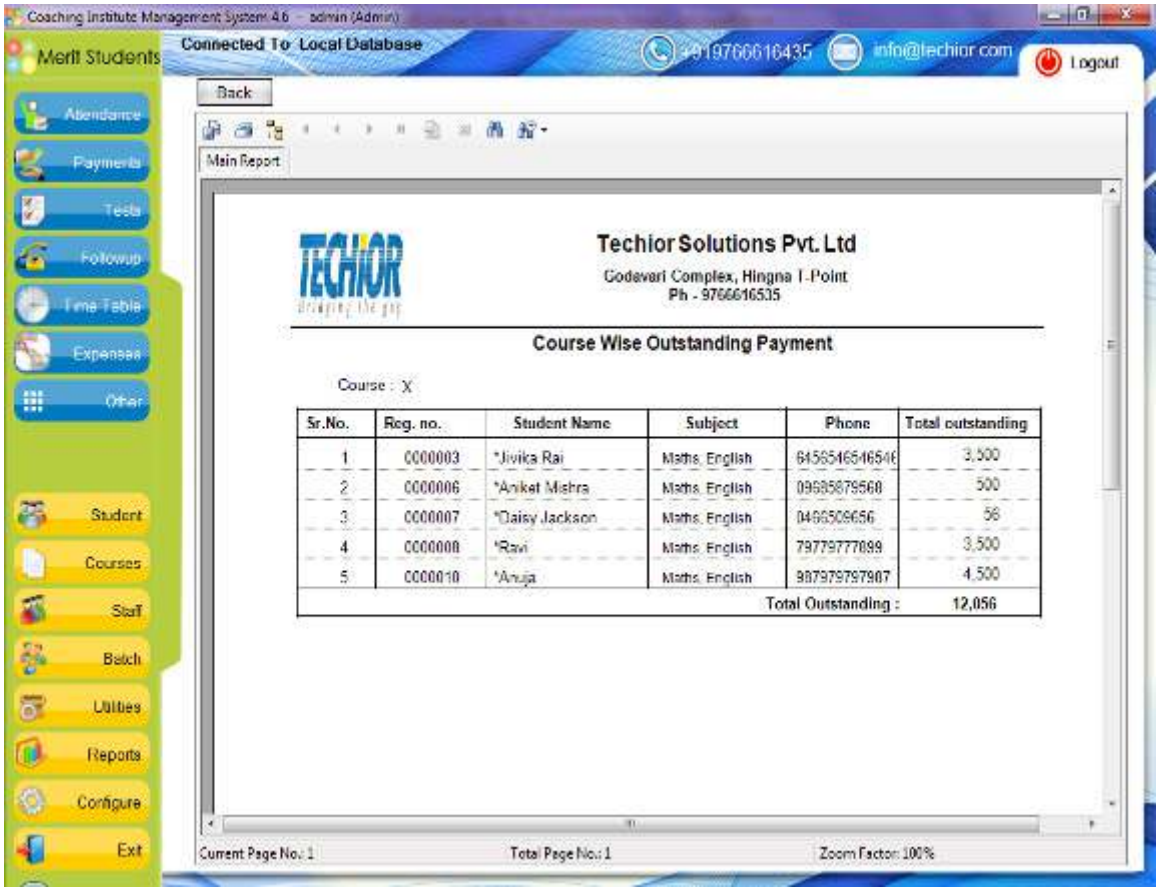
Course wise Payment Received:

This report gives a list of installment payments received for a particular course within the specified dates. Select the course, “From date” and “To date” and press “View” to see the payments received.



Course wise Outstanding Payment:

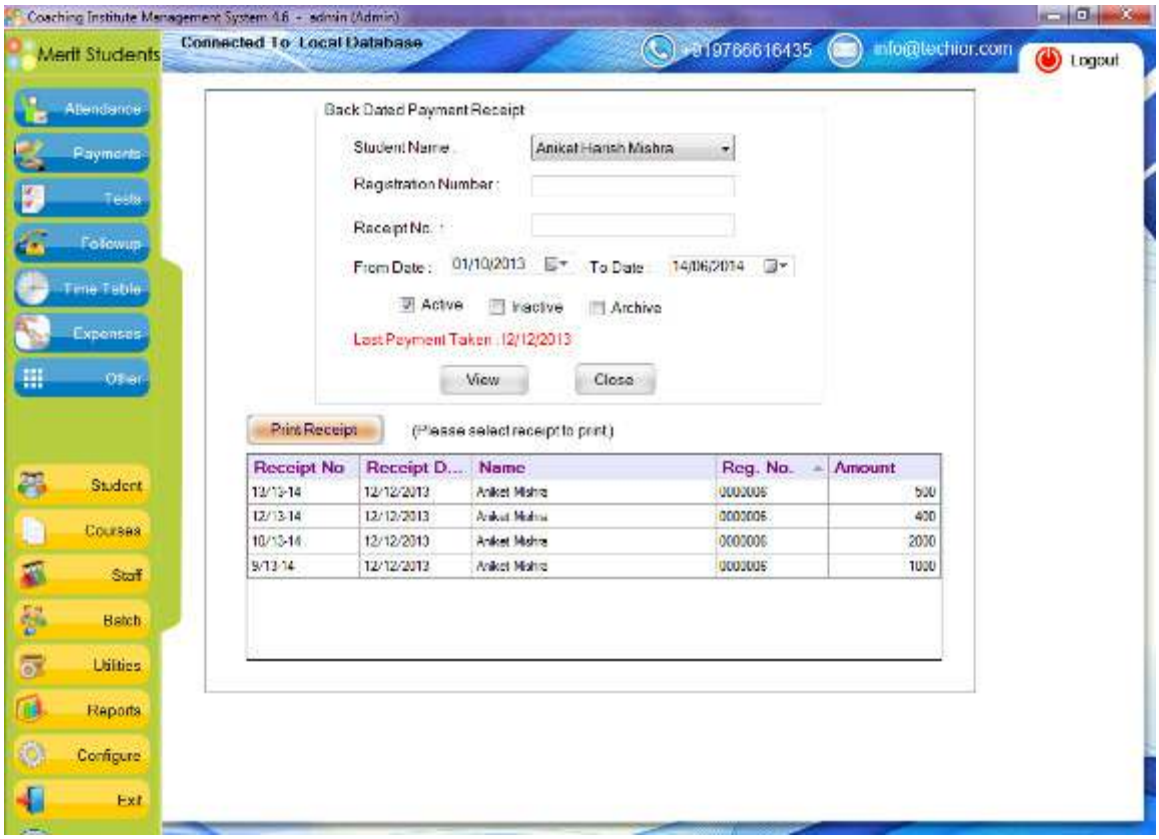
This report gives a list of payments that are outstanding for a particular course. Select the course and press “View” to see the payments outstanding.



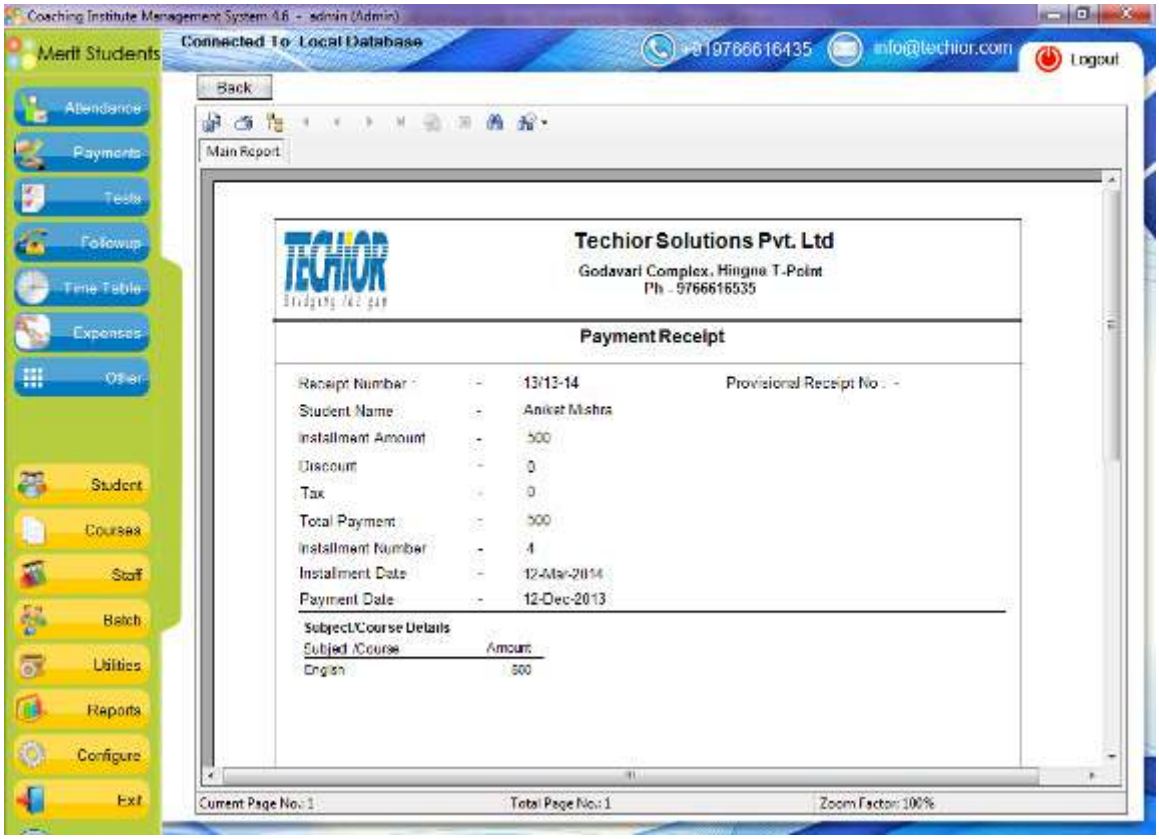
Back dated Payment Receipt:

This is used to generate a back dated payment receipt. Specify the name of the student for whom the receipt is required and the date on which the payment was done. Click “View” to generate the receipt. The receipt can be printed and given to the student.

Note: If the date of payment is not known, then see the Student Payment report to see the list of payments made by the student.

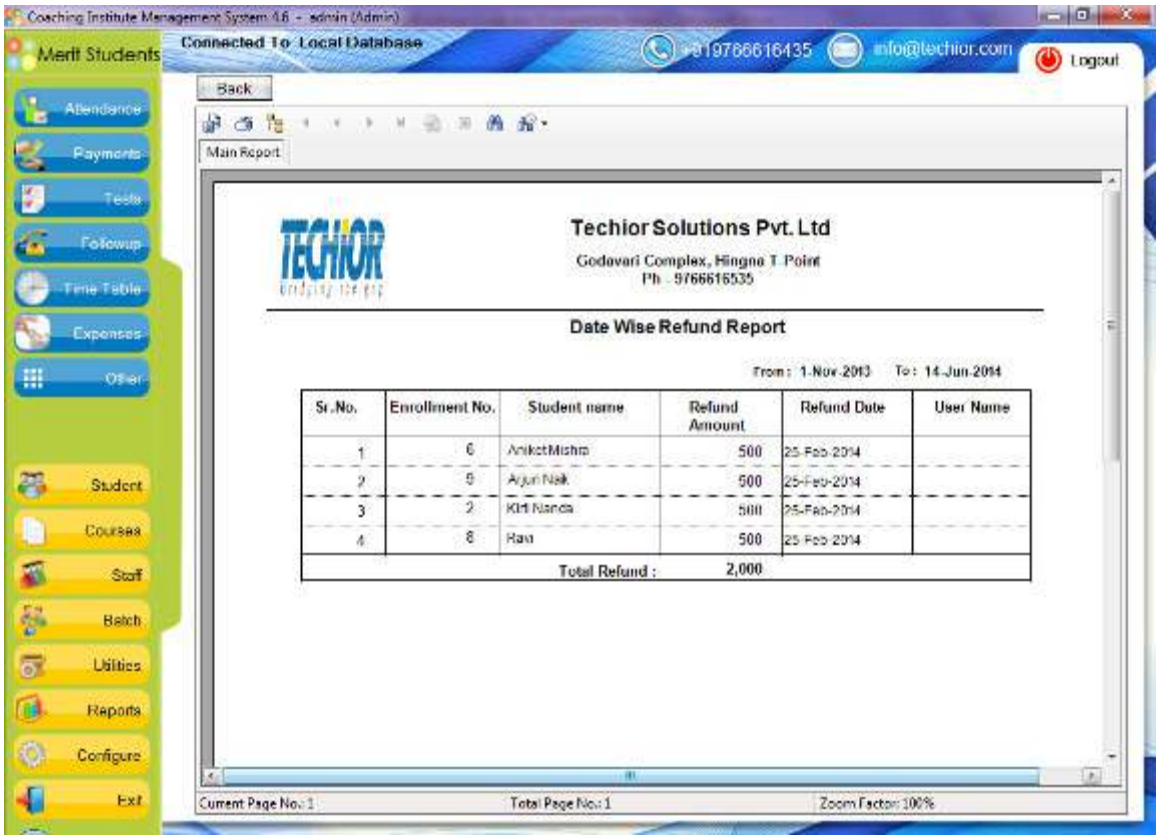


Here select the student & click on print receipt, receipt will be generated.


Coaching Institute Management System 4.6 - admin (Admin)
Merit Students
Connected To Local Database
+919766616435
info@techior.com
Logout
Back
Main Report
Attendance
Payments
Tests
Followup
Time Table
Expenses
Other
Student
Courses
Staff
Batch
Utilities
Reports
Configure
Exit
Techior Solutions Pvt. Ltd
Godavari Complex, Hingna T-Point
Ph - 9766616535
Payment Receipt
Receipt Number - 13/13-14
Provisional Receipt No. -
Student Name - Ankit Mishra
Installment Amount - 500
Discount - 0
Tax - 0
Total Payment - 500
Installment Number - 4
Installment Date - 12-Mar-2014
Payment Date - 12-Dec-2013
Subject/Course Details
Subject /Course
Amount
English
500
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 100%

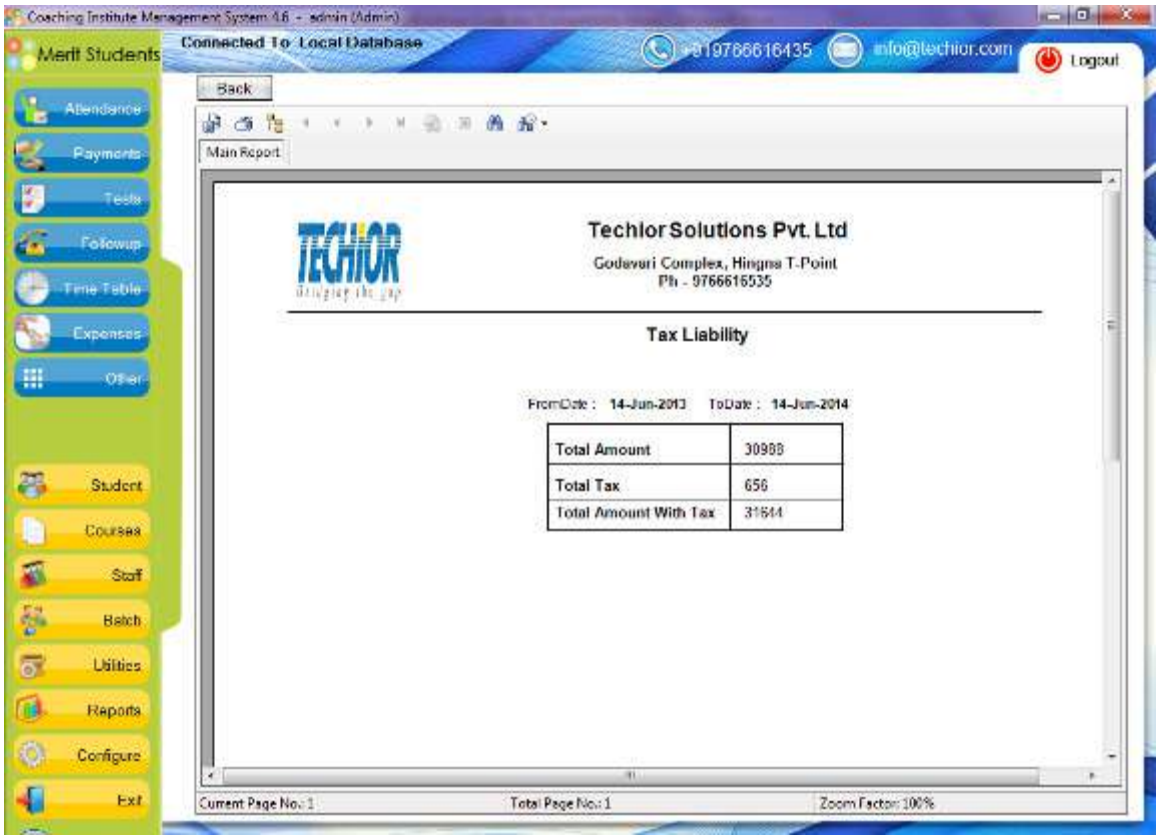
Date wise refund report:

This report gives a list of refunds that have been given within the specified dates. Select “From date” and “To date” and press “View” to see the refunds given.



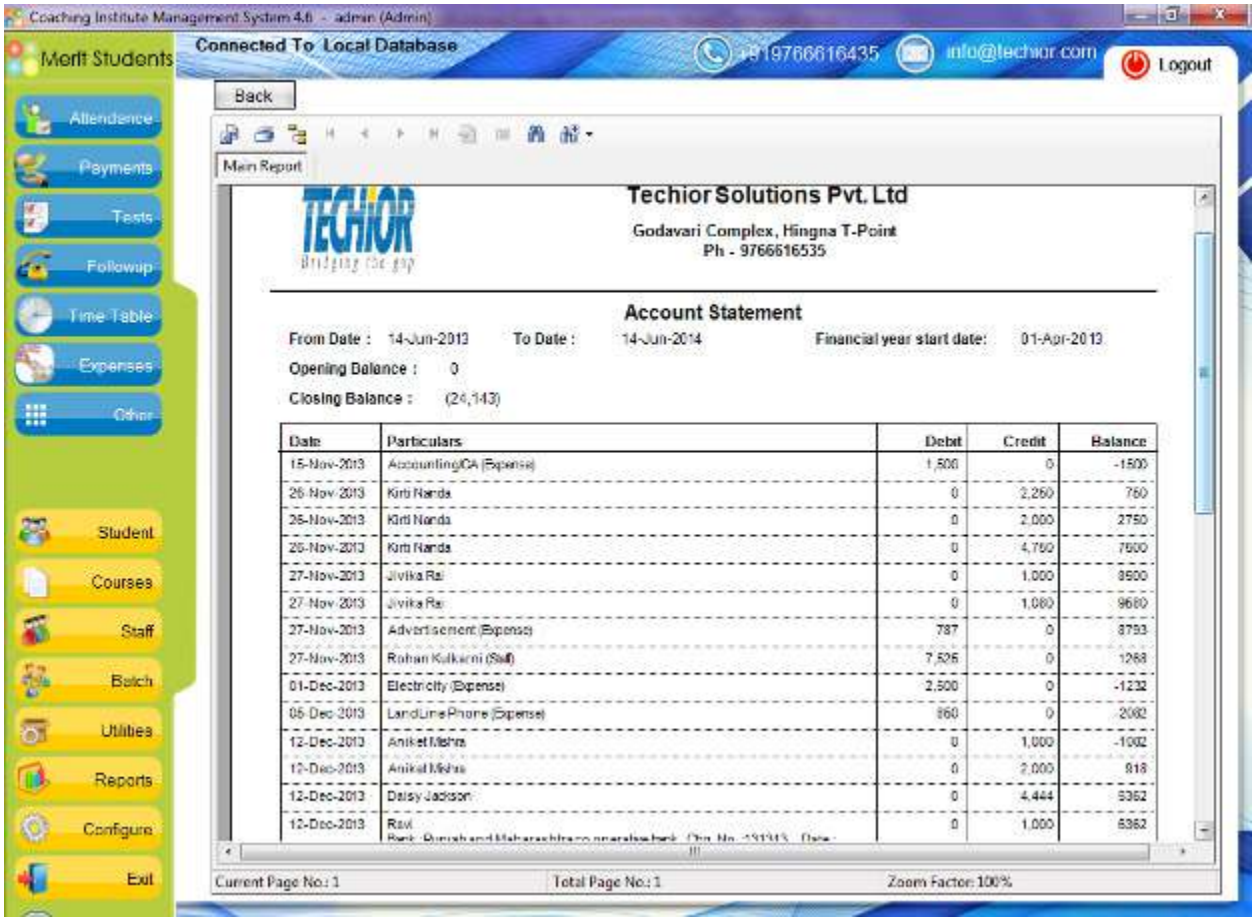
Tax liability report:

This report gives the total amount received with and without Tax/GST/GST and also the amount that has been received in the form of Tax/GST/GST within the specified dates. Select “From date” and “To date” and press “View” to see the Tax/GST liability for the specified period.



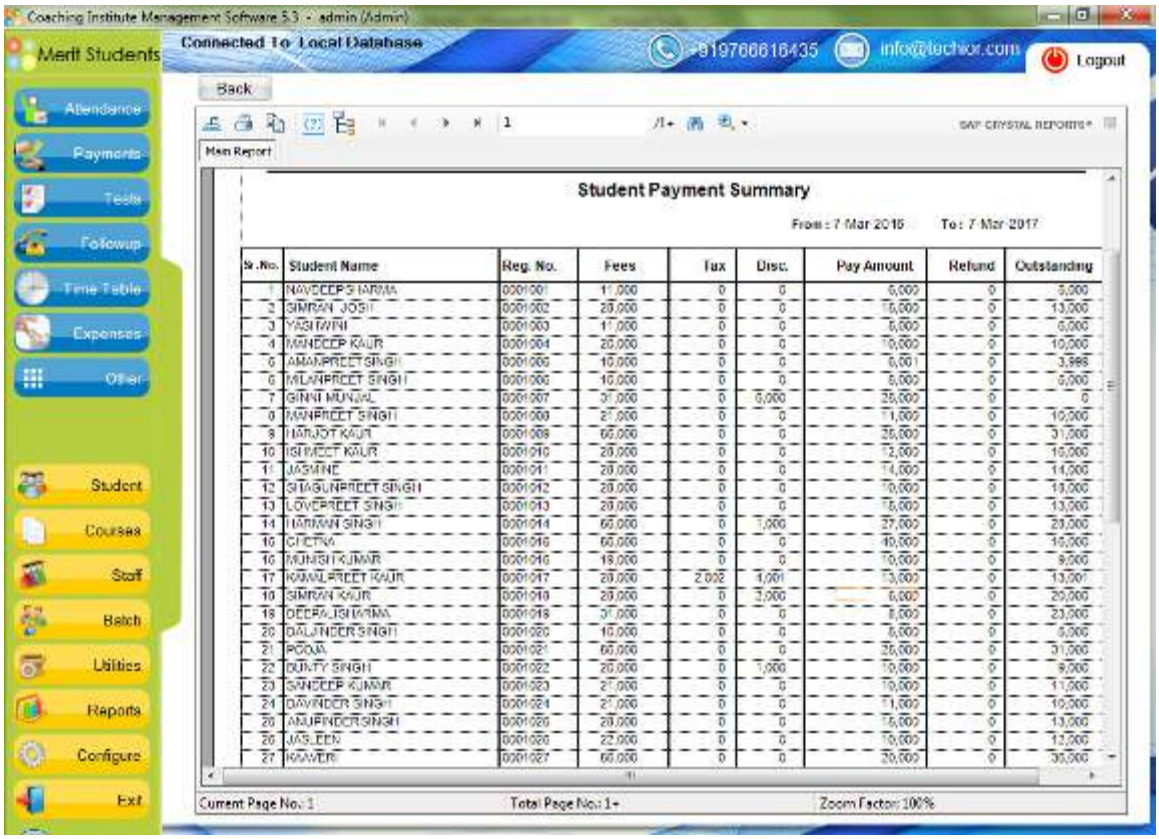
Account Statement:-

This report shows all the credited & debited amount as well as Opening & Closing balance within the given date range.



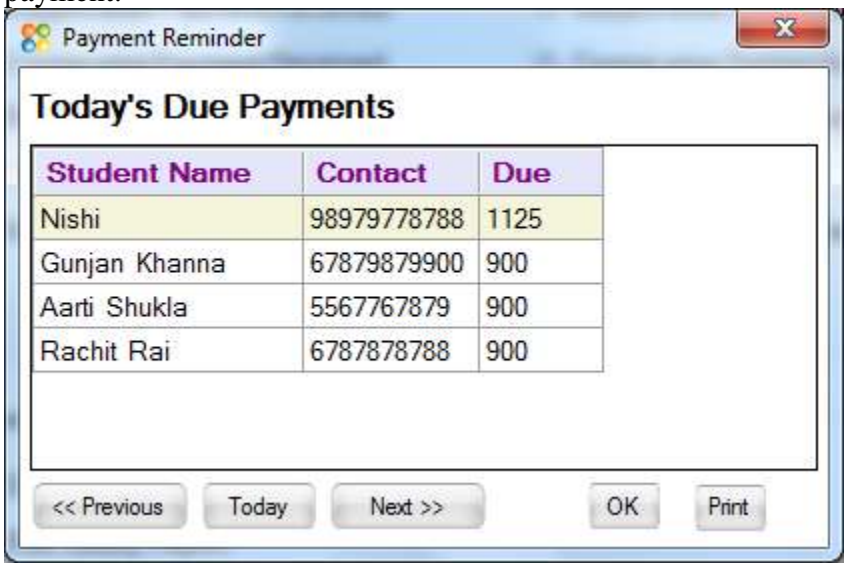
Payment Summary:

This report allows user to select batches & shows the outstanding payments of the students belonging to that particular batch.



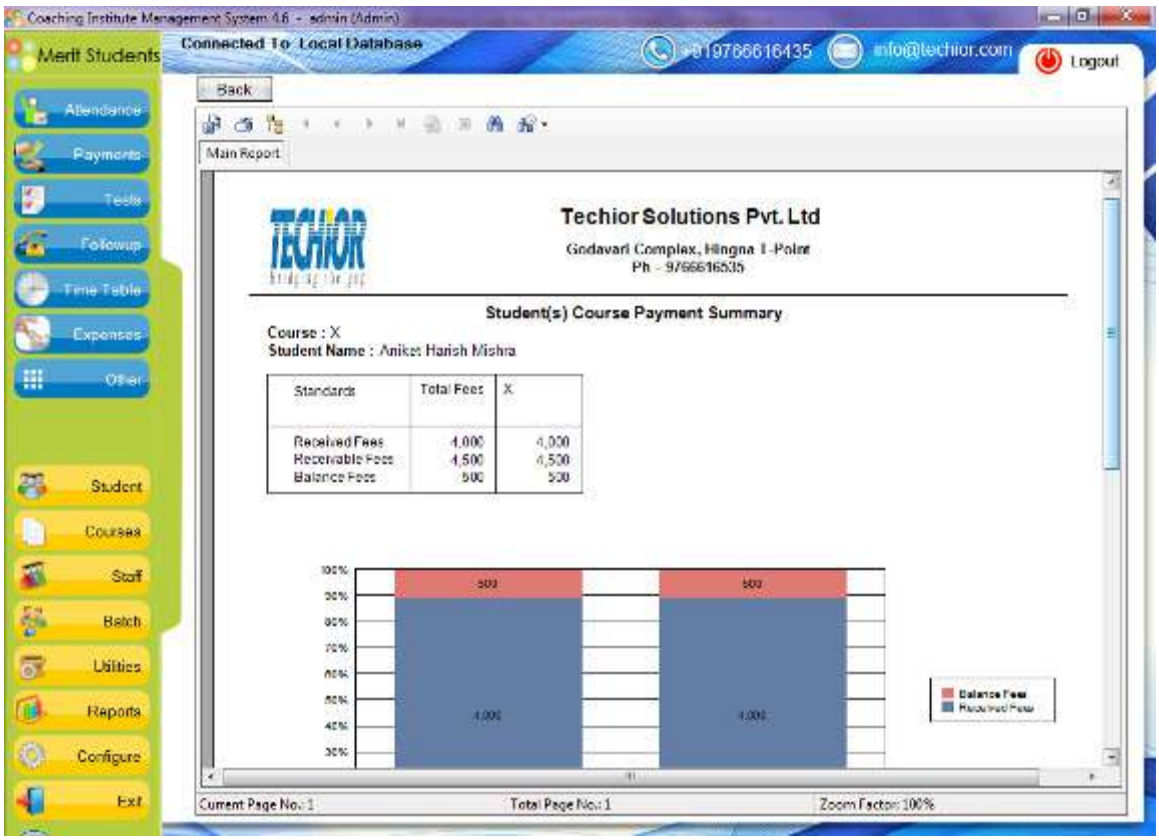
Due payment reminder:

Click on this report option , it will directly open the pop up reminder for the due payment.



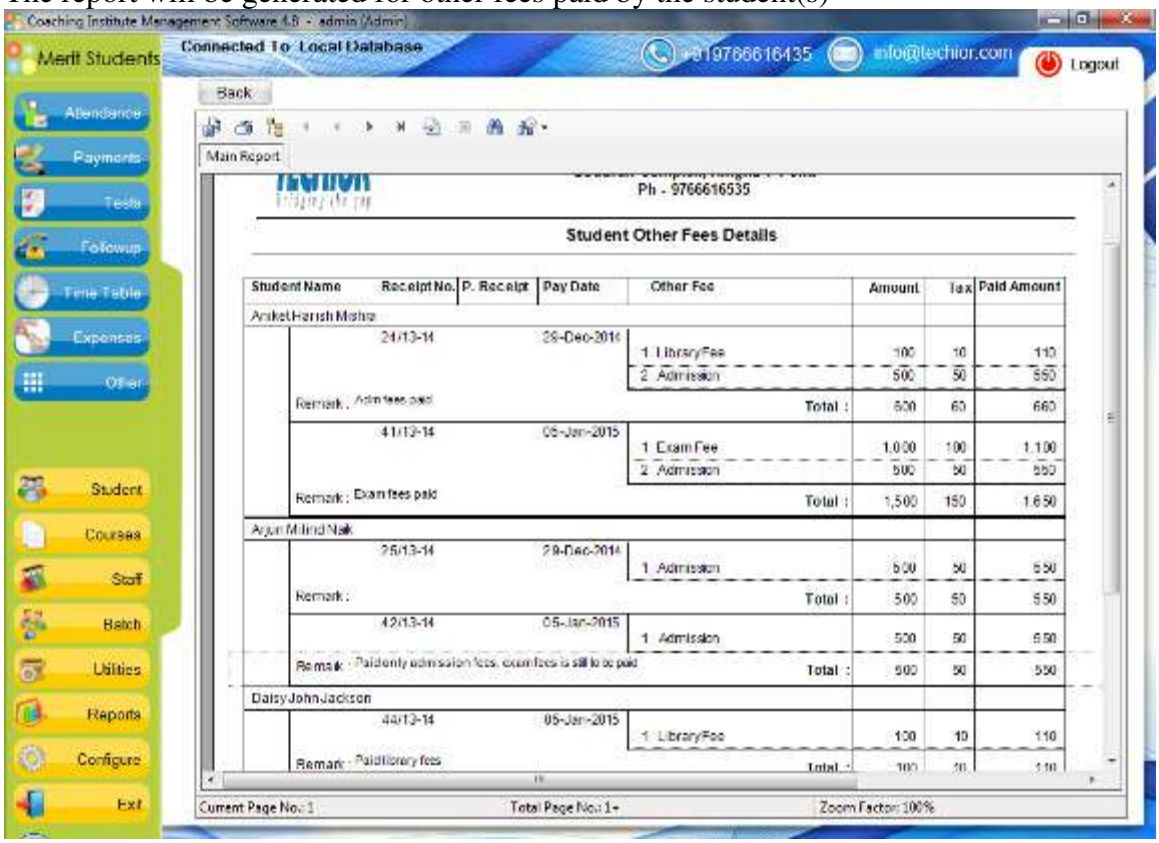
Student course payment summary:

This report will show payment summary of the student for particular course along with the Receivable fees, received fees & balance fees.



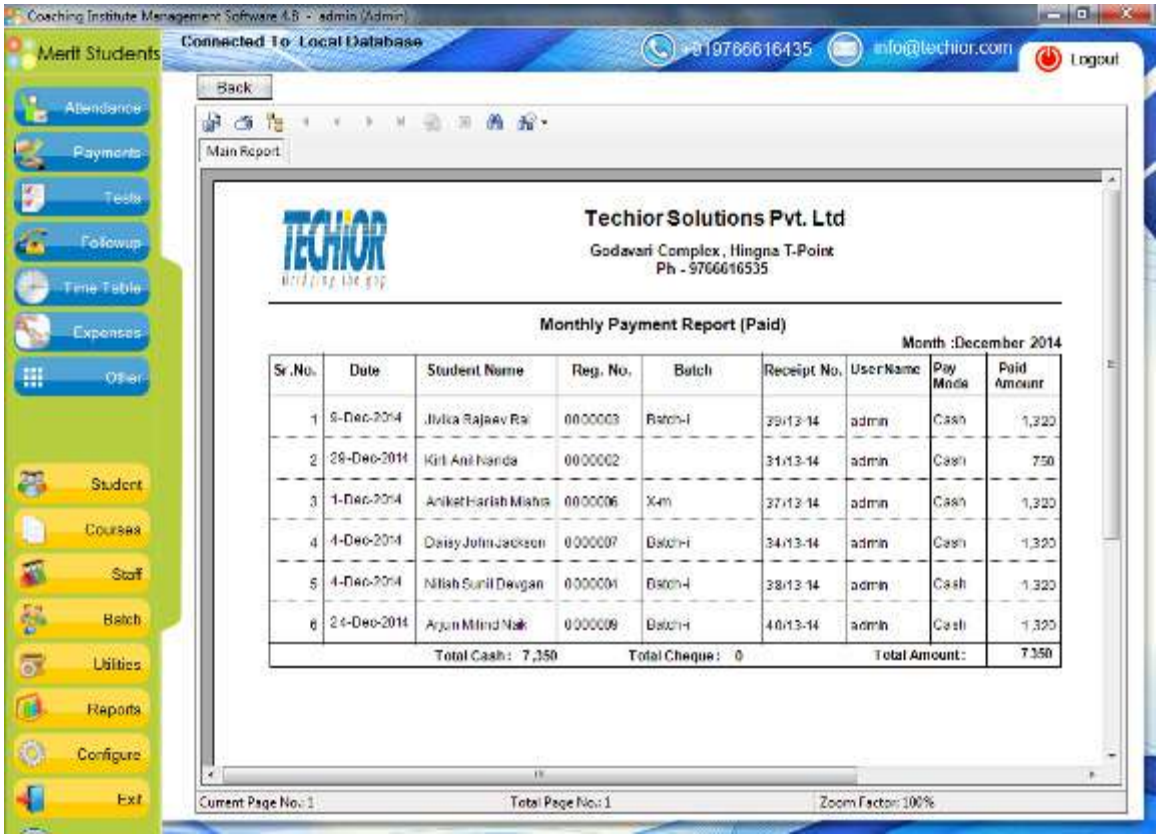
Student Other Fees:

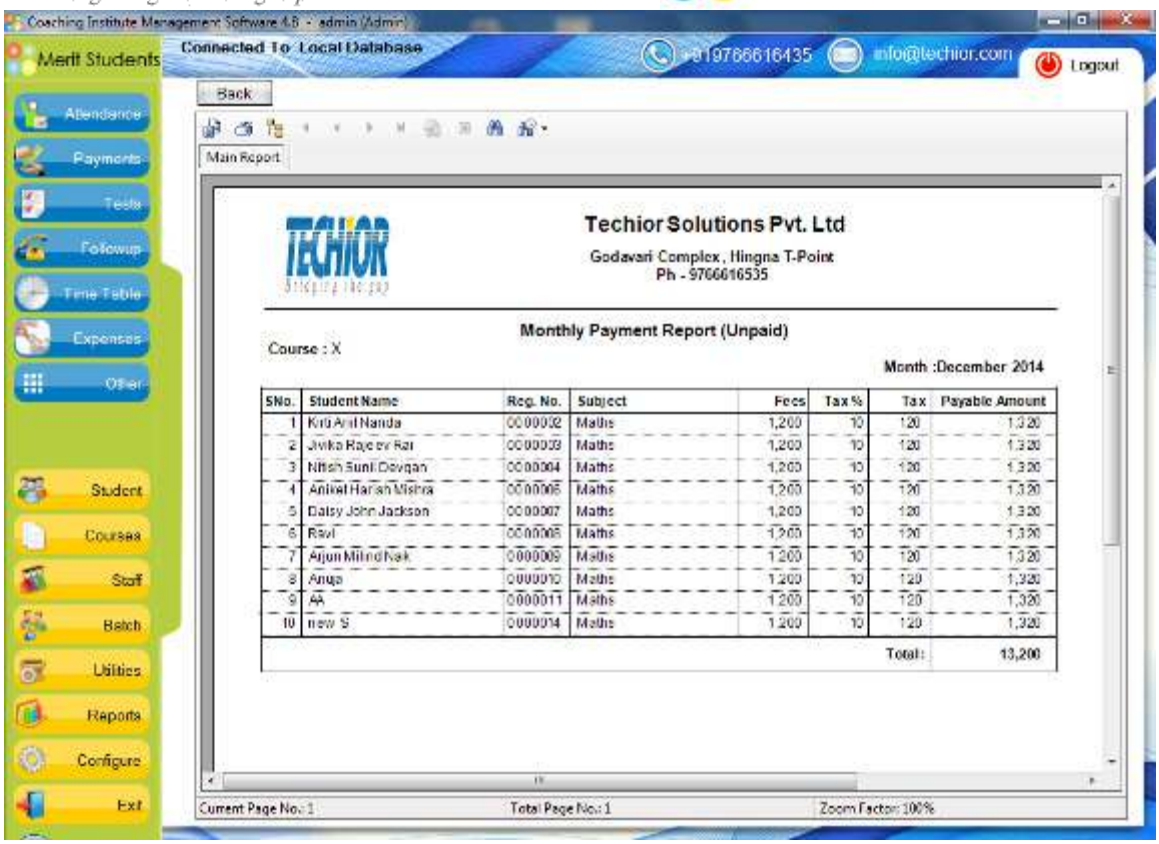
The report will be generated for other fees paid by the student(s)



Monthly payment report:

The report will be generated for the Paid or Unpaid monthly fees of the student(s). If you accept monthly fees for you courses, then you can use this report to see which students have paid the fees in a certain month and which students have not paid the fees.



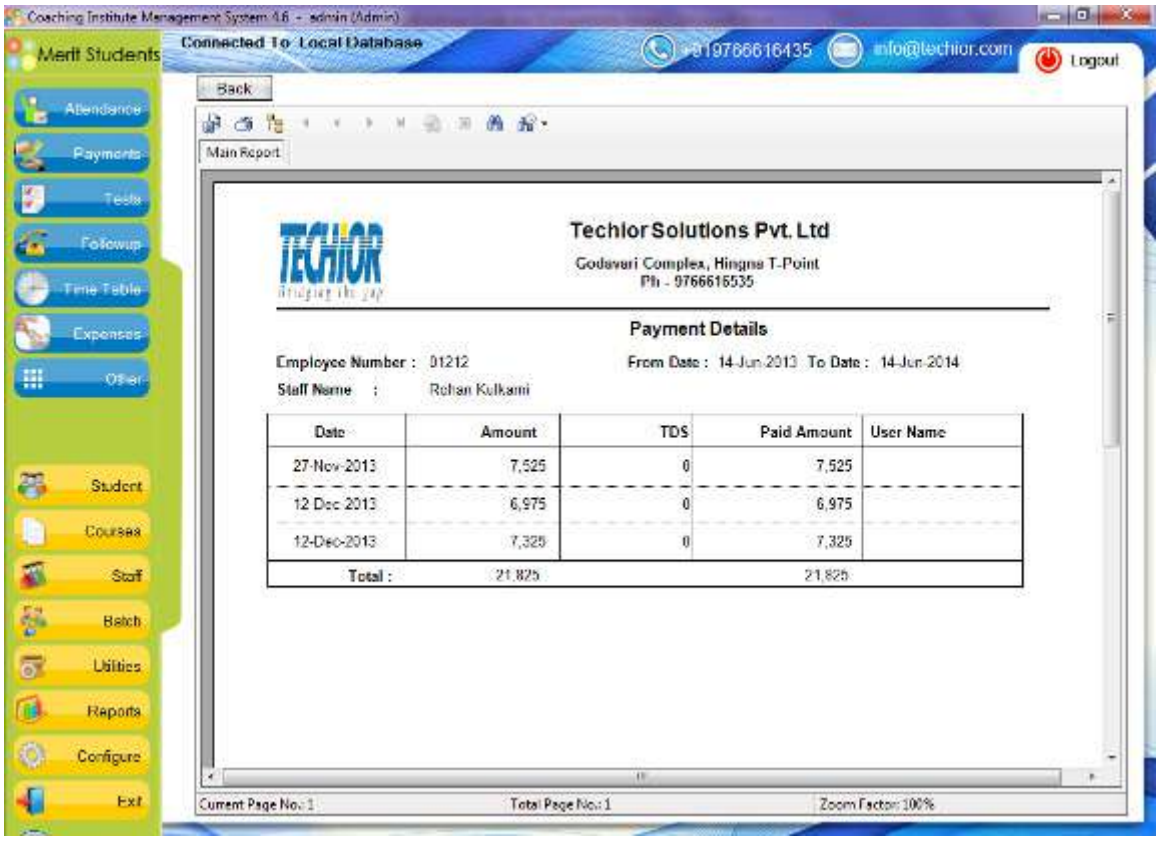

Coaching Institute Management Software 4.8 - admin (Admin)
Merit Students
Connected To Local Database
+919766616435
info@techior.com
Logout
Back
Attendance
Payments
Tests
Followup
Time Table
Expenses
Other
Student
Courses
Staff
Batch
Utilities
Reports
Configure
Exit
Main Report
Techior Solutions Pvt. Ltd
Godavari Complex, Hingna T-Point
Ph - 9766616535
Monthly Payment Report (Unpaid)
Course : X
Month :December 2014
SNo. | Student Name | Reg. No. | Subject | Fees | Tax % | Tax | Payable Amount
1 | Kirti Anil Nanda | 0000002 | Maths | 1,200 | 10 | 120 | 1,320
2 | Jivika Rajeev Rai | 0000003 | Maths | 1,200 | 10 | 120 | 1,320
3 | Nitish Sunil Devgan | 0000004 | Maths | 1,200 | 10 | 120 | 1,320
4 | Aniket Harish Mishra | 0000005 | Maths | 1,200 | 10 | 120 | 1,320
5 | Daisy John Jackson | 0000007 | Maths | 1,200 | 10 | 120 | 1,320
6 | Ravi | 0000008 | Maths | 1,200 | 10 | 120 | 1,320
7 | Arjun Milind Naik | 0000009 | Maths | 1,200 | 10 | 120 | 1,320
8 | Anuja | 0000010 | Maths | 1,200 | 10 | 120 | 1,320
9 | AA | 0000011 | Maths | 1,200 | 10 | 120 | 1,320
10 | new S | 0000014 | Maths | 1,200 | 10 | 120 | 1,320
Total : 13,200
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 100%

Date Wise Staff Salary:

This report gives a list of staff payments which have been paid within the specified dates. Select the “From date” and the “To date” and press “View” to see the payments paid.

Staff Salary Report:

This report gives a list of staff payments up to the current date. Select the staff name for which the payment report is required and press “View” to the see the report.

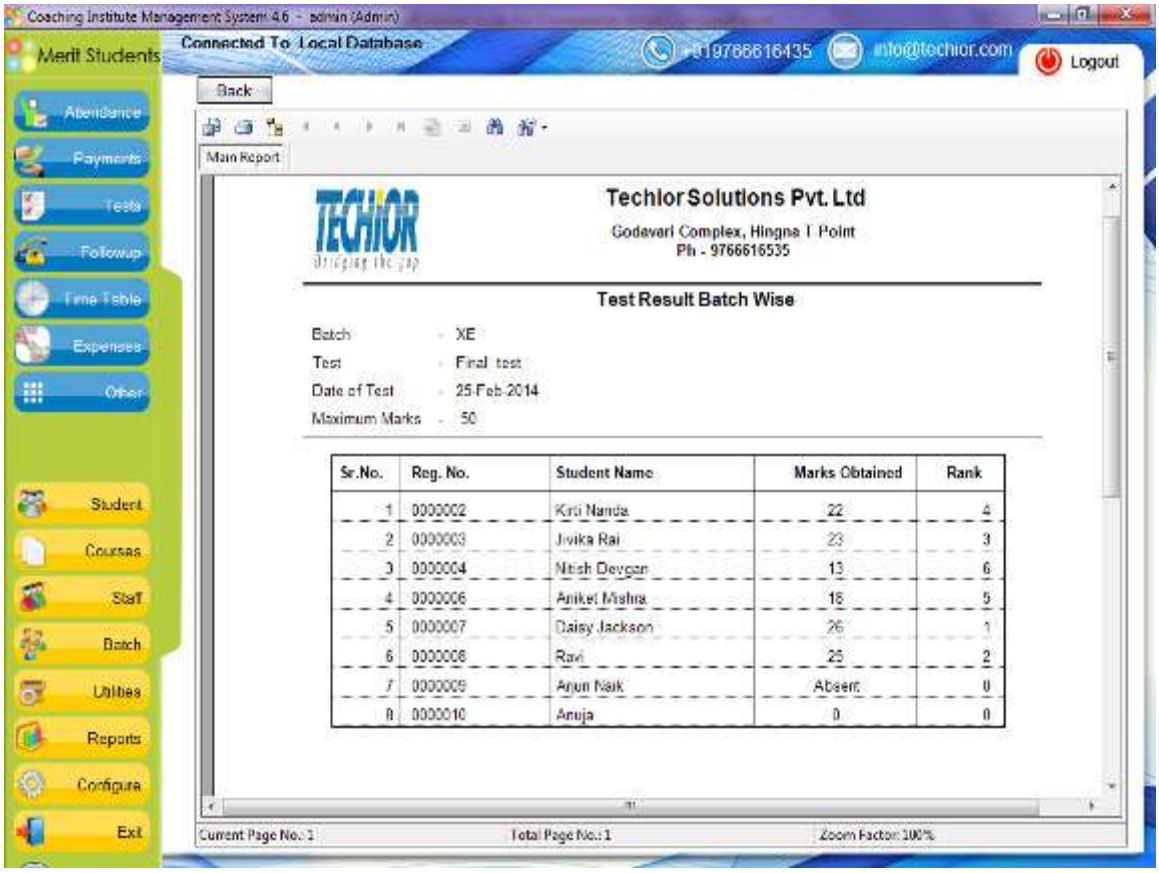


Test Reports:

Under this category, the reports available are:

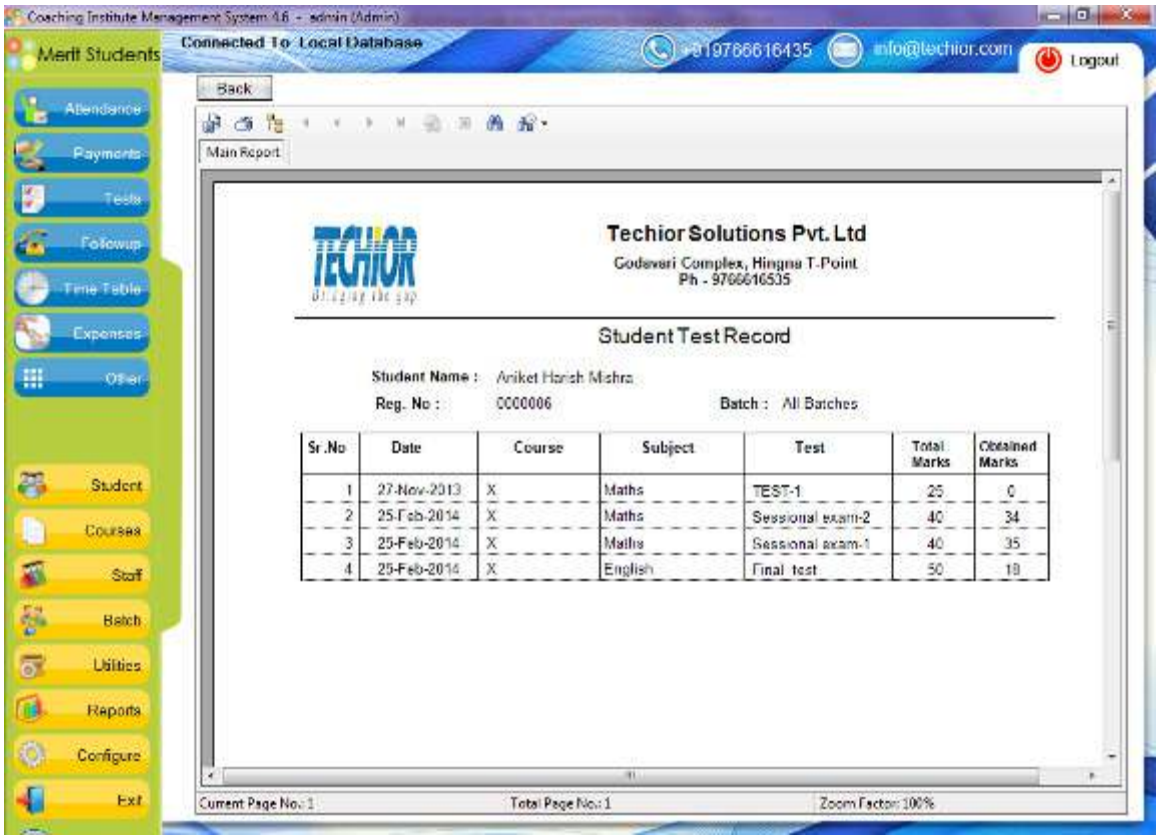
Test Result batch wise:

This report gives the marks scored by the students of a specified batch in a particular test. Select the batch and the test name and press “View” to see the report.



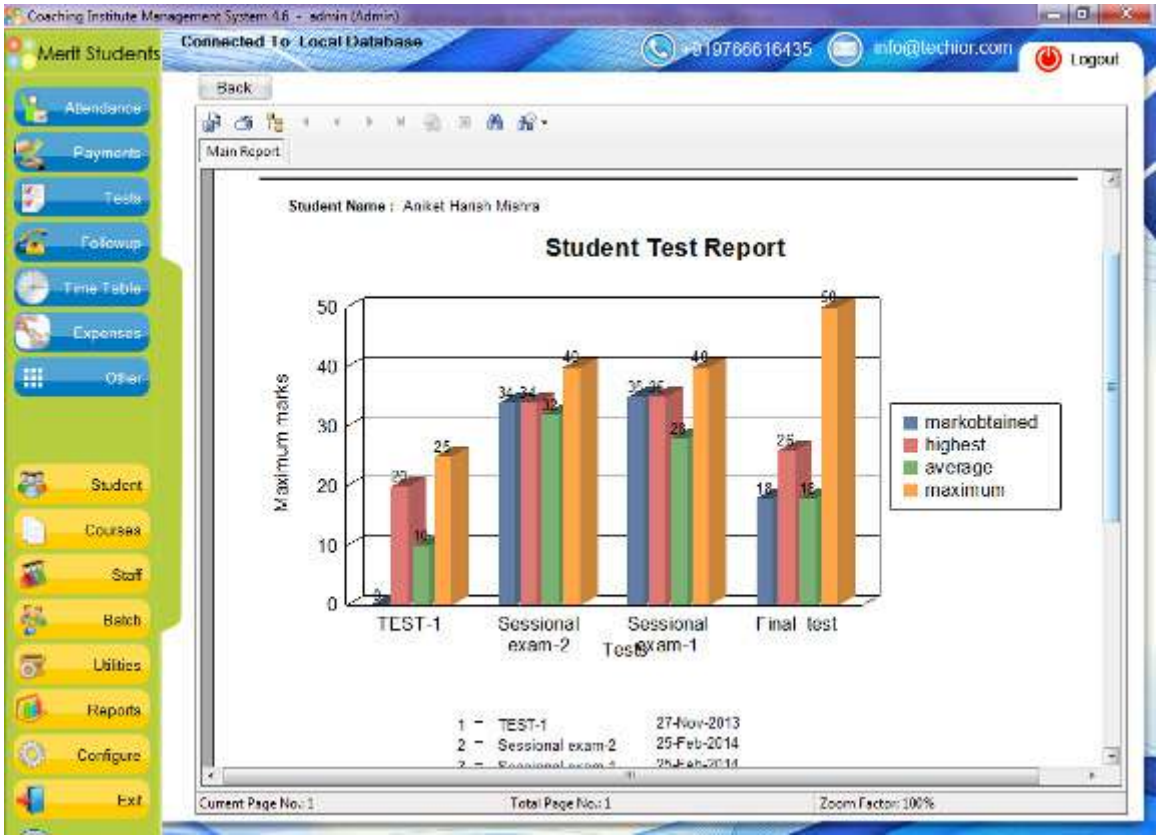
Student Test Record:

This report gives the marks obtained by a particular student for all the tests conducted in a batch. Select the batch and the student whose marks are to be viewed and press “View” to see the report.



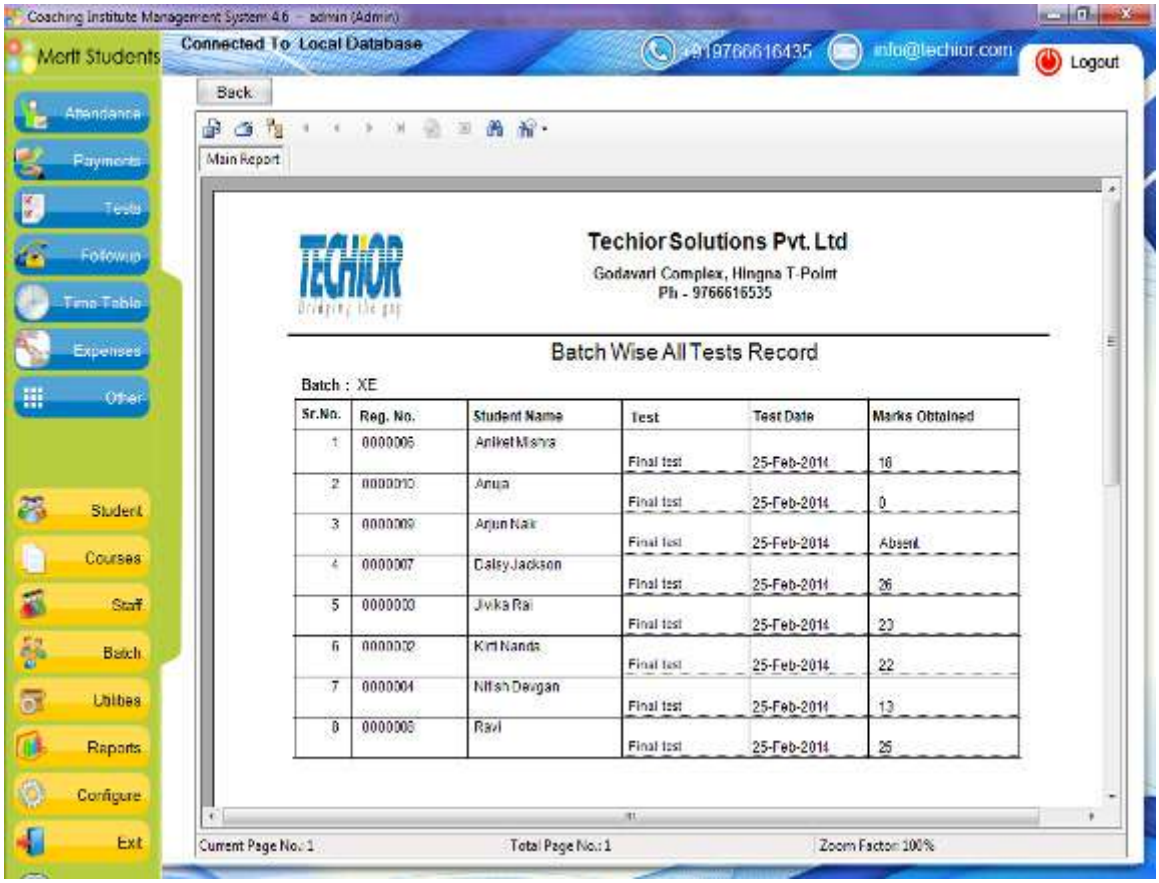
Student Record (Graph):

This report gives the marks obtained by a particular student for all the tests conducted in a batch in a graphical format. Select the batch and the student whose marks are to be viewed, select “View Graph” and press “View” to see the report.

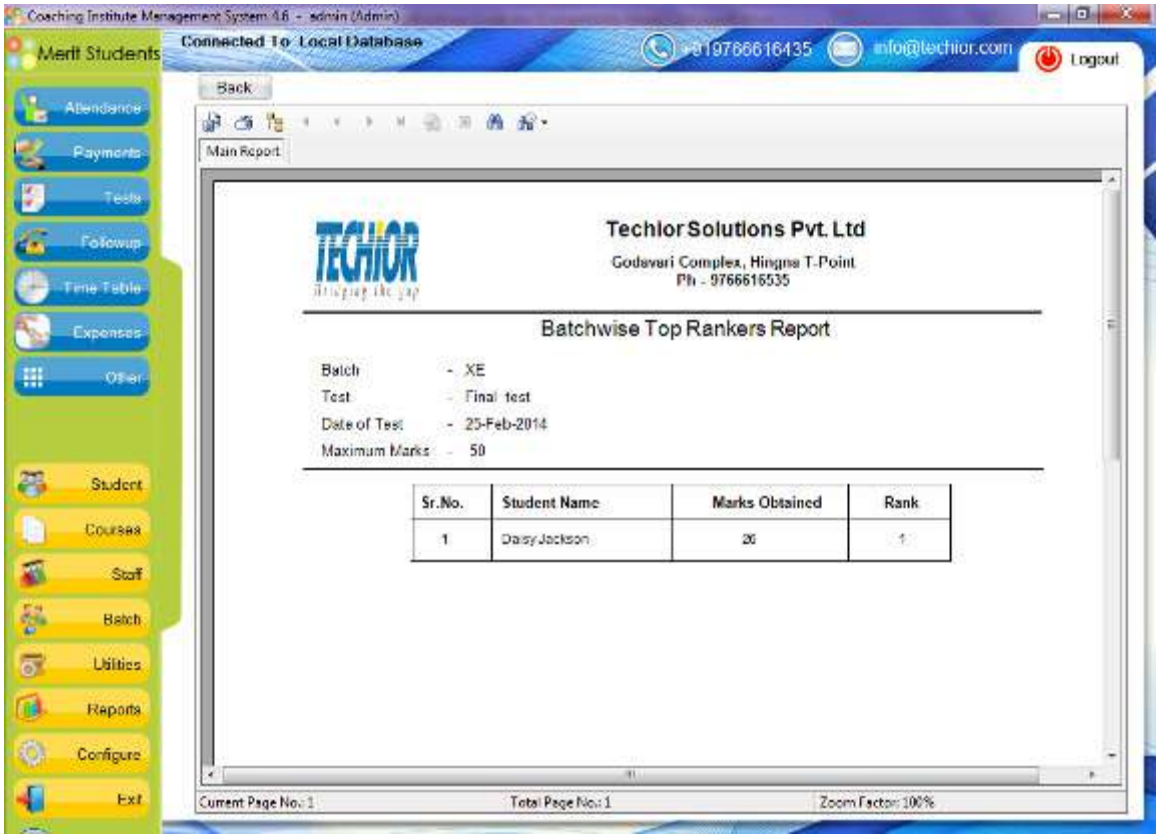


Batch wise all tests record:

This report gives the complete record of the performance of a batch. It gives the marks obtained by all the students of a batch in all the tests conducted. Simply select the batch and press “View” to see the report.

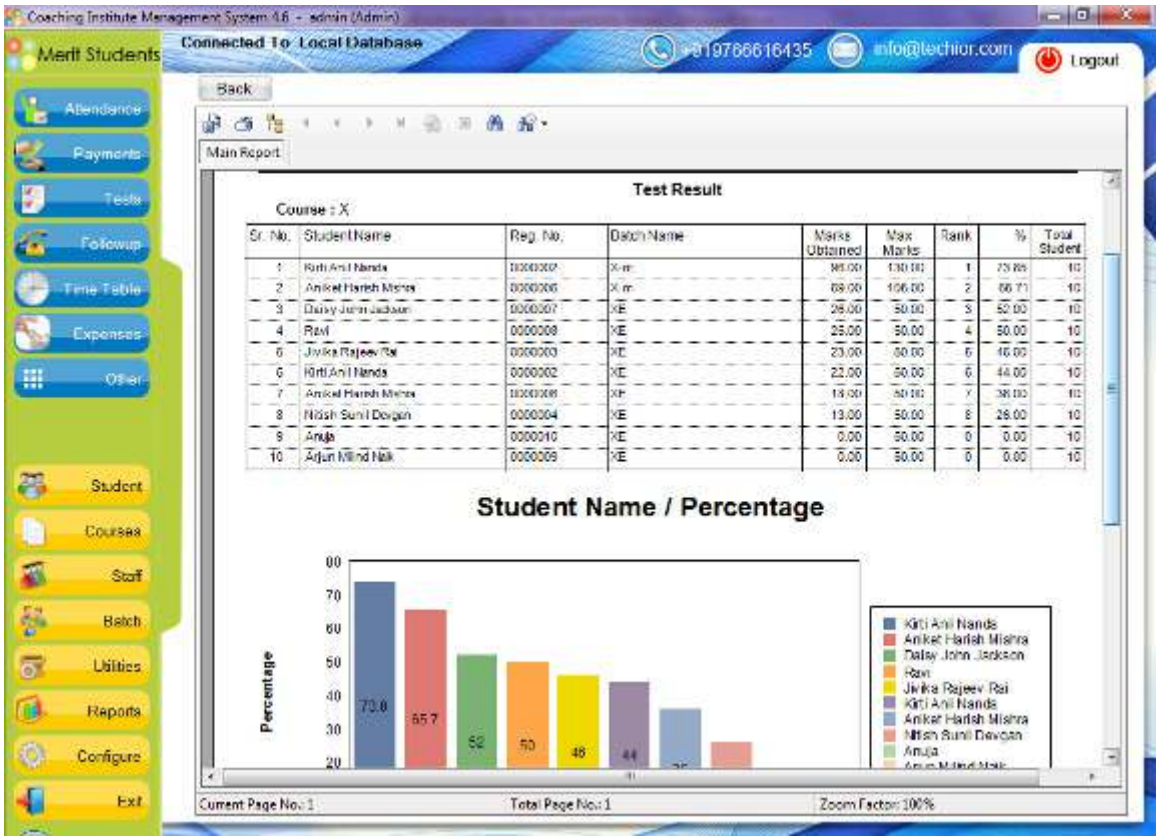


Batch Wise Top Rankers:

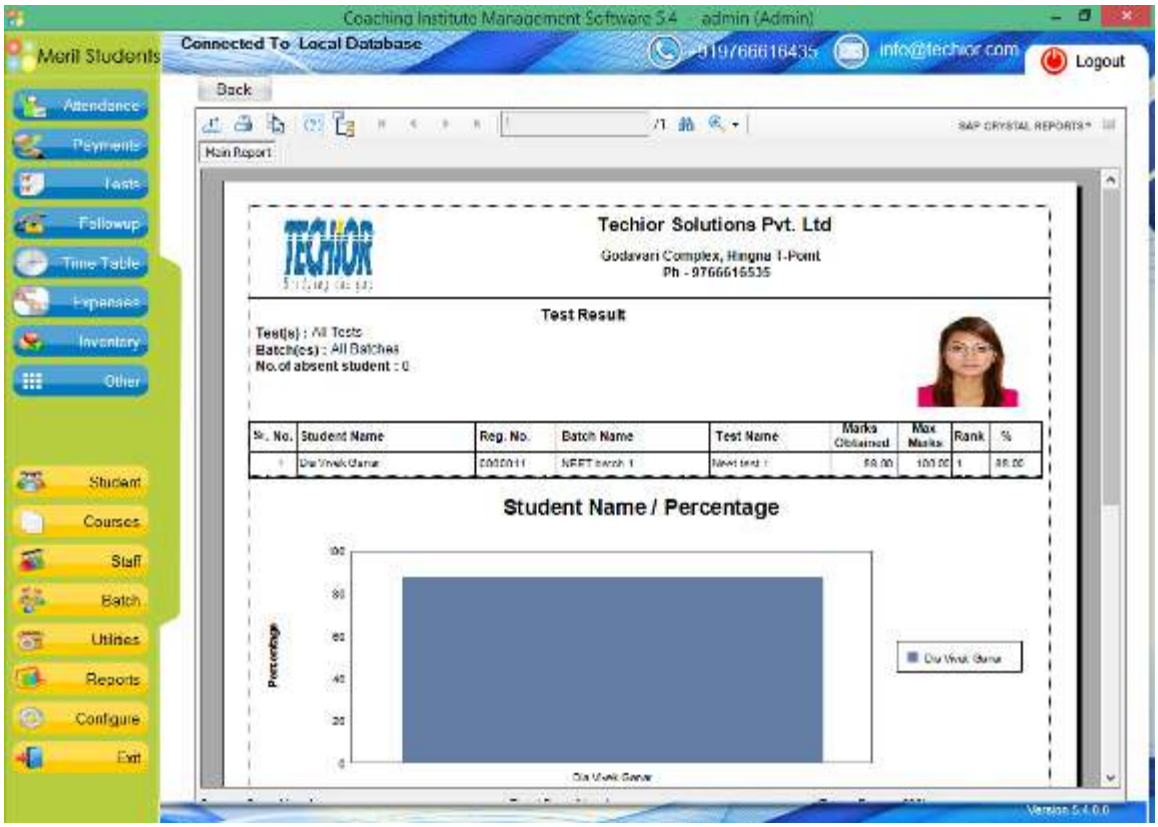


Test Result:

This report will show the combine report for all tests for all batches for all student.



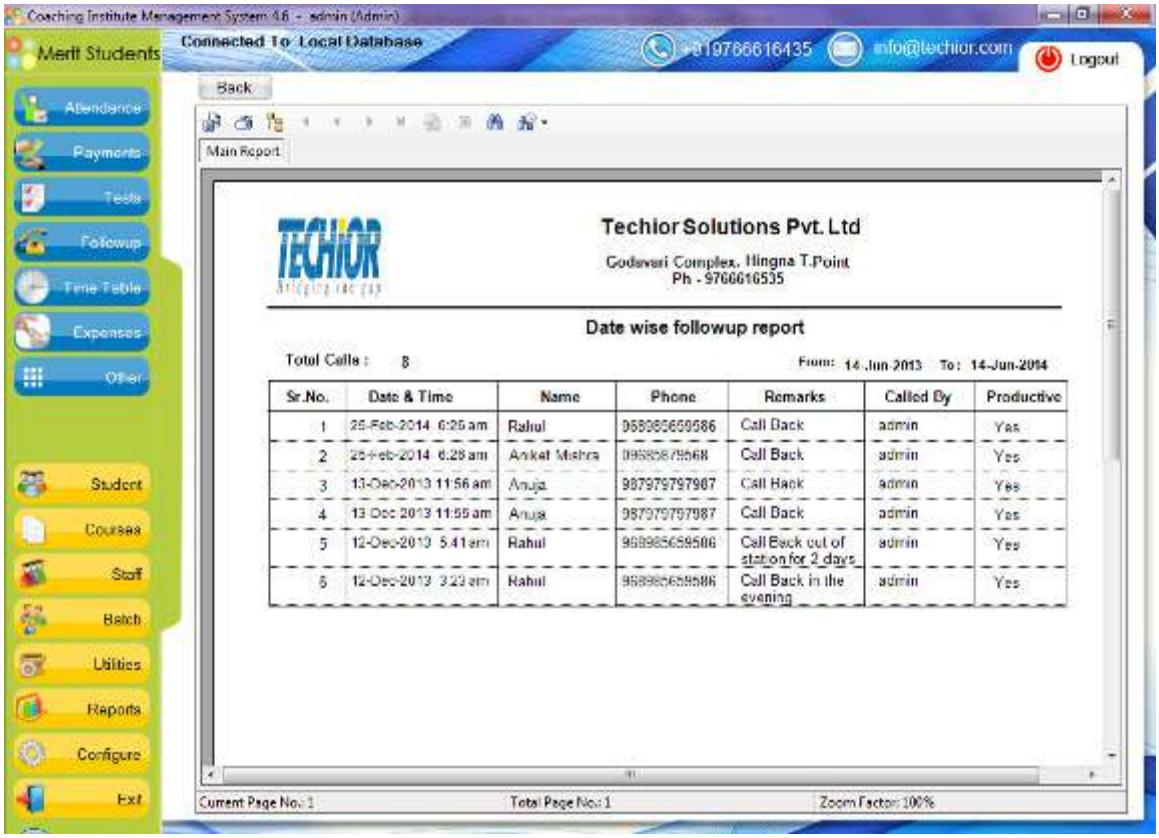
Also if you select a particular student, this report will show the combine report for all tests for all batches for student along with student photo.



Follow-up Reports: Under this category, the reports available are:

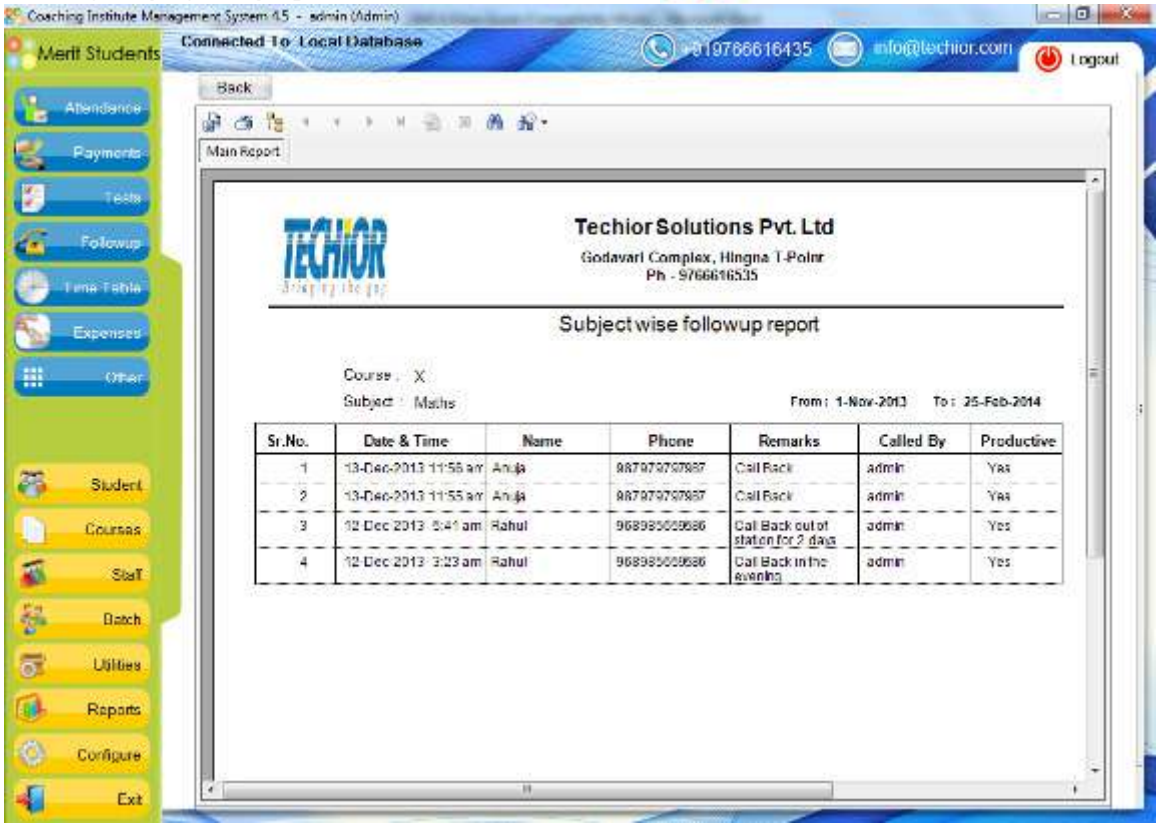
Date wise follow-up report: This is a report of all the follow-up calls which have been made in a given range of dates. Select the “From date” and the “To date” and click on “View” to see the report.

User can choose to see all the calls, or only the productive or only the unproductive calls. Each call is categorized into productive or unproductive based on the status of the call.



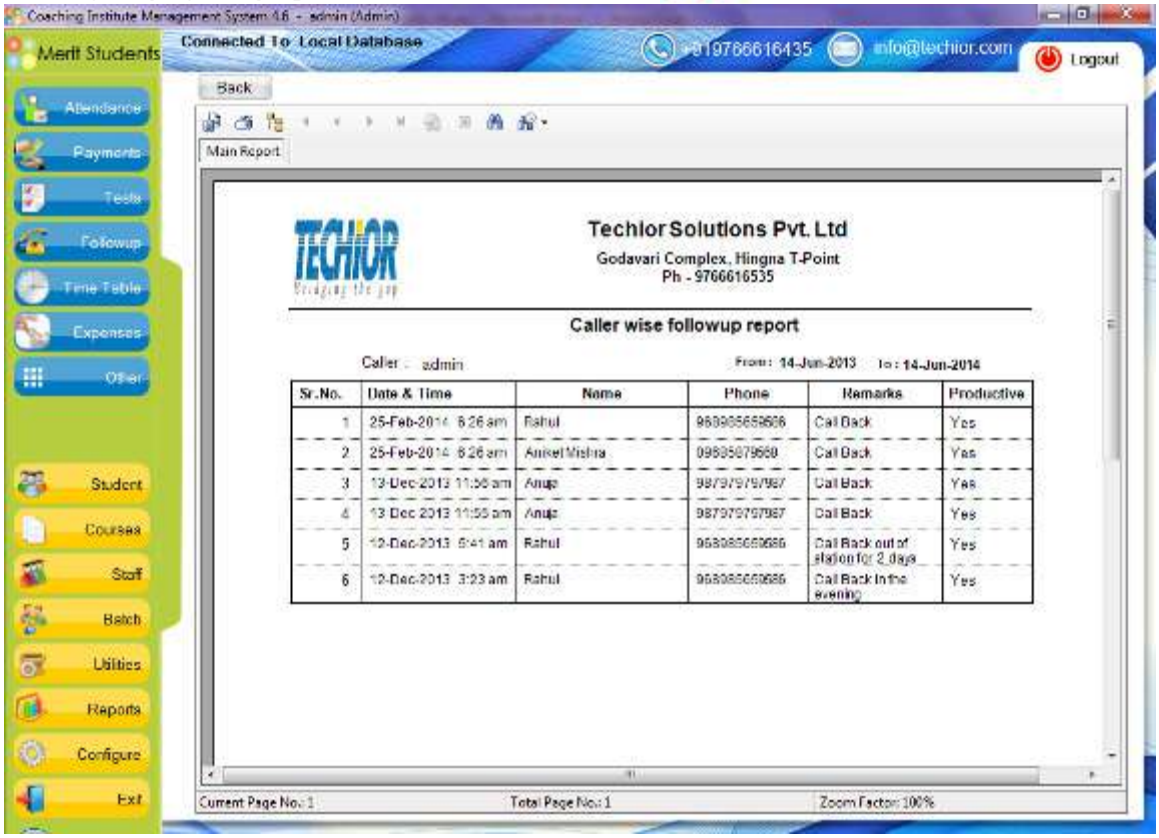
Subject wise follow-up report: This report gives a list of all the follow-up calls which have been made for a particular subject in a given range of dates. Select the Course, subject, “From date” and the “To date” and click “View” to see the report.

User can choose to see all the calls, or only the productive or only the unproductive calls. Each call is categorized into productive or unproductive based on the status of the call.



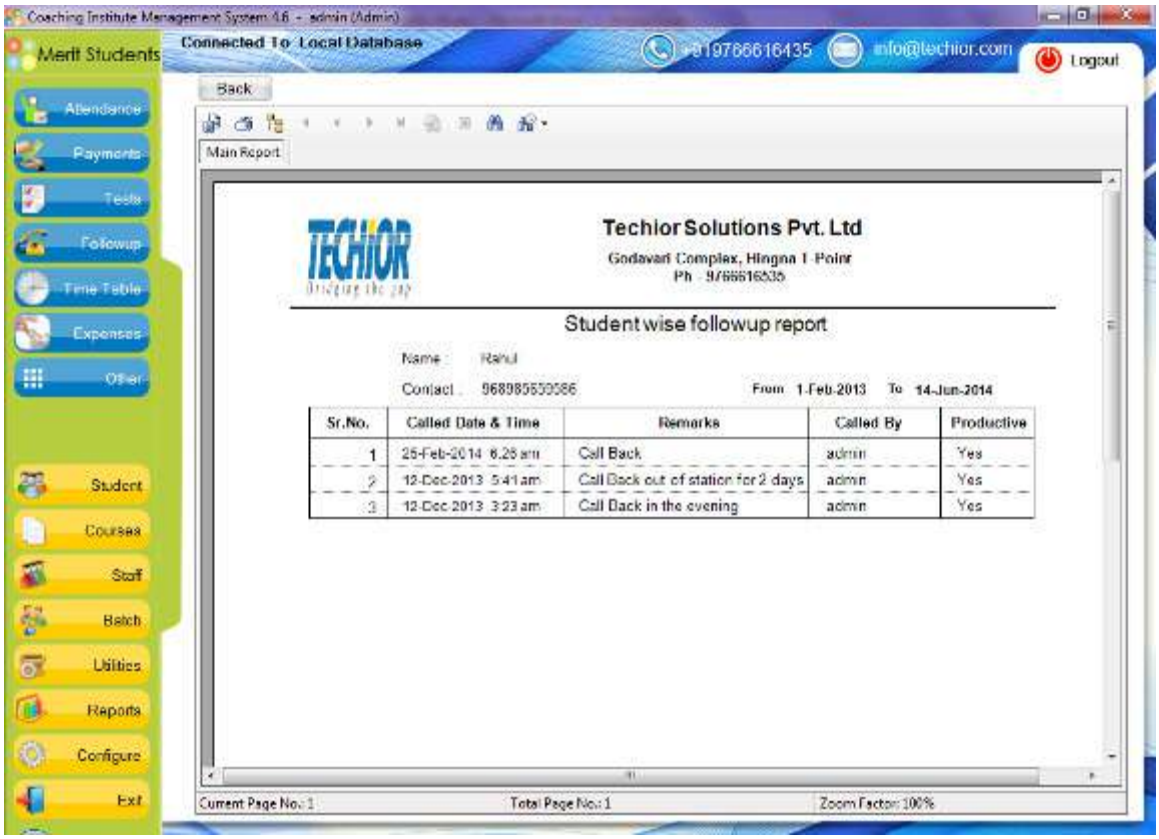
Caller wise follow-up report: This report gives a list of all the follow-up calls which have been made by a particular caller in a given range of dates. Select the Caller name, “From date” and the “To date” and click “View” to see the report.

User can choose to see all the calls, or only the productive or only the unproductive calls. Each call is categorized into productive or unproductive based on the status of the call.

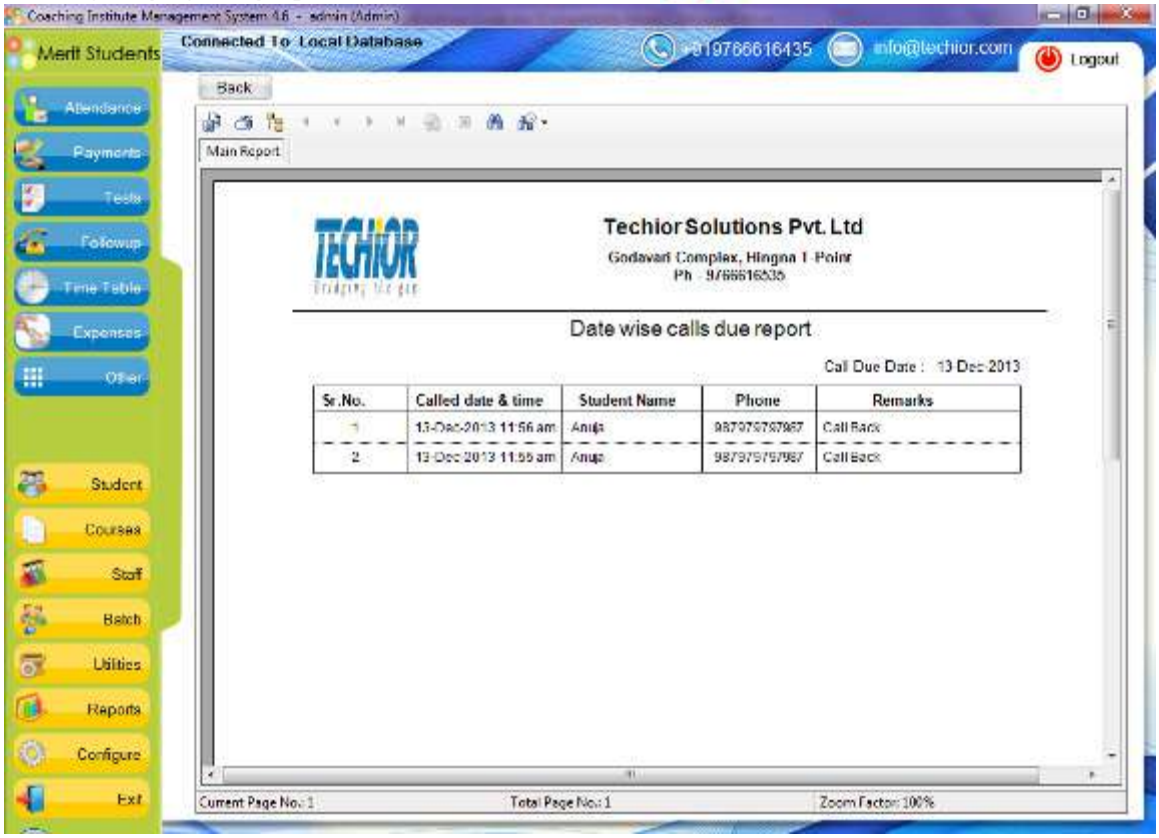


Student wise follow-up report: This report gives a list of all the follow-up calls which have been made to a particular student in a given range of dates. Select the Student name, the “From date” and the “To date” and click “View” to see the report.

User can choose to see all the calls, or only the productive or only the unproductive calls. Each call is categorized into productive or unproductive based on the status of the call.

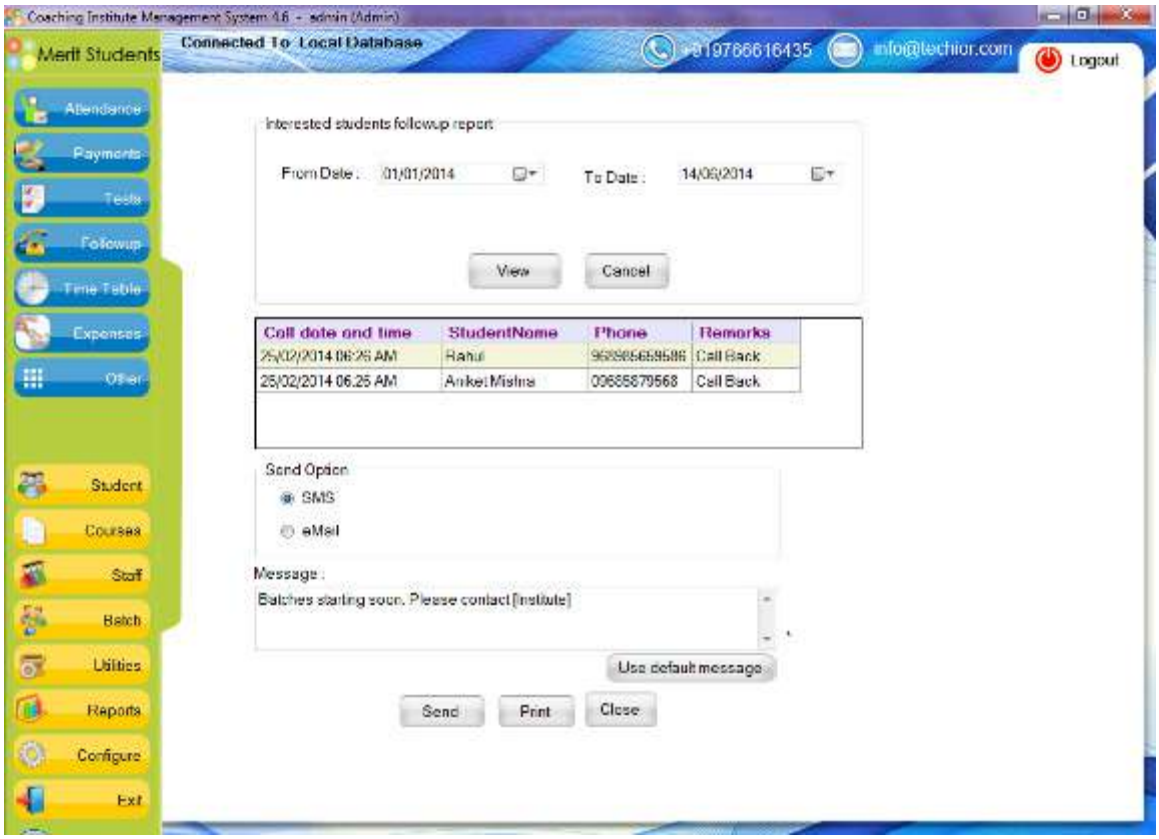


Date wise calls due report: This report gives a list of all the follow-up calls which are due on a selected date. Select the Due Date for which we want to see the calls due and click “View” to see the report.



Interested students follow-up report: This report gives a list of all the follow-up calls in a given range of dates in which the students have shown a positive response and the “Interested” checkbox was ticked. Select the “From date” and the “To date” and click “View” to see the list of the interested students.

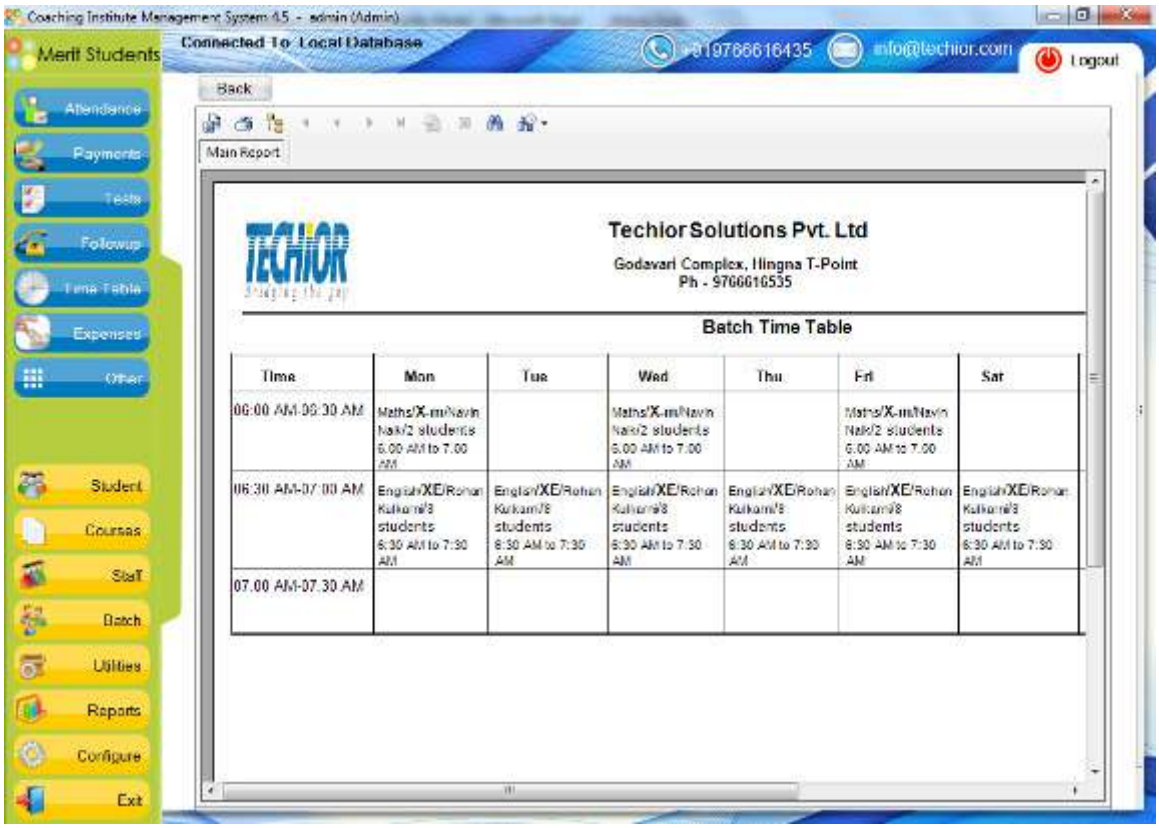
An SMS or an email can be sent to the interested student from here. Type the message to be sent and click “Send” to send the message.



Time Table:

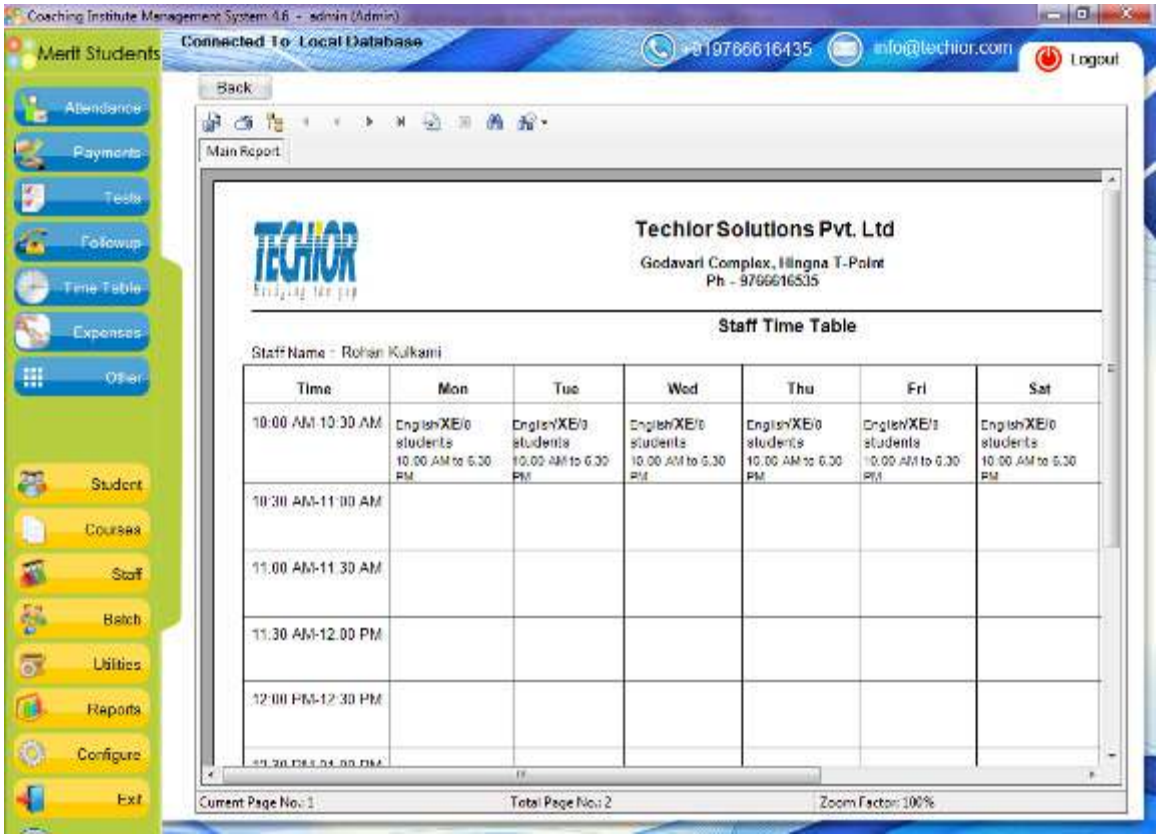
To view a consolidated report of all the batches created, go to "**Reports**" and click on "**Batch Time Table**" from the left side menu. You can also view this report by clicking on "**Show Batch Time Table**" from the Batch Search Page.

Batch Time Table Report



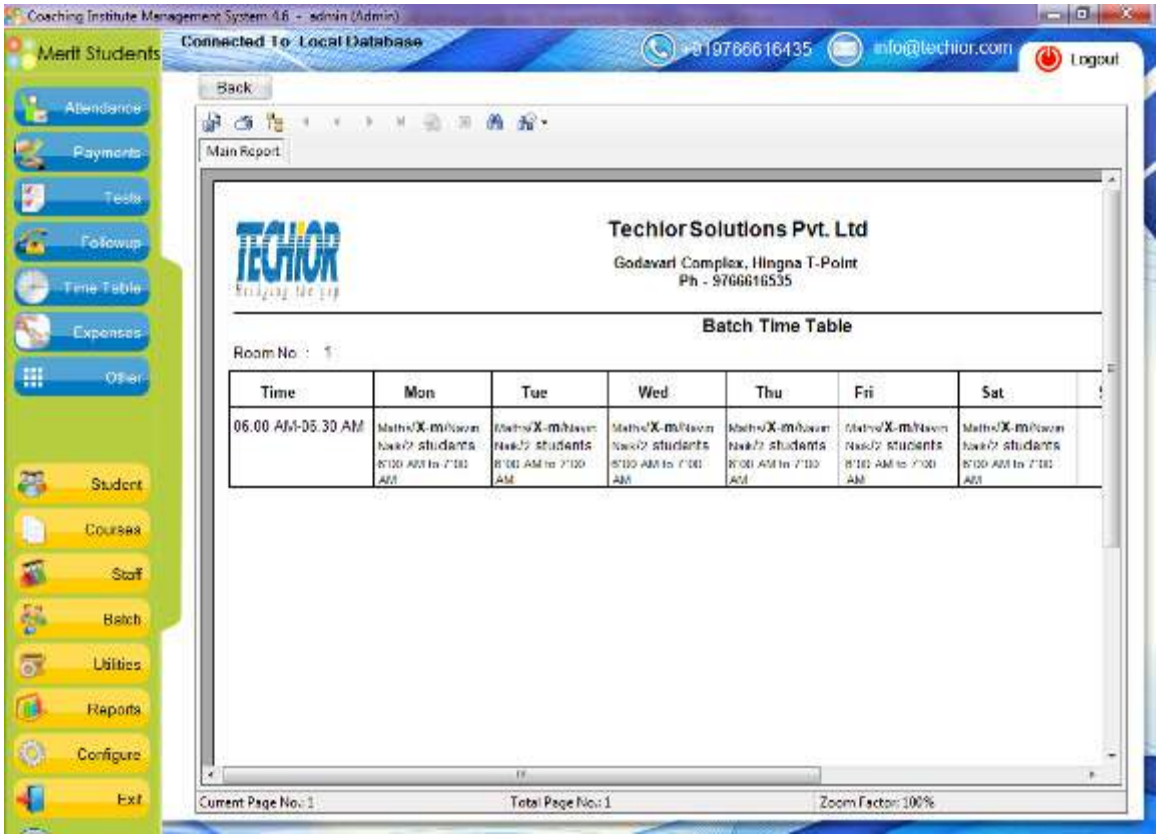
Staff Time Table:

Here by selecting trainer name from the dropdown & click on go.



Room Number wise time table:

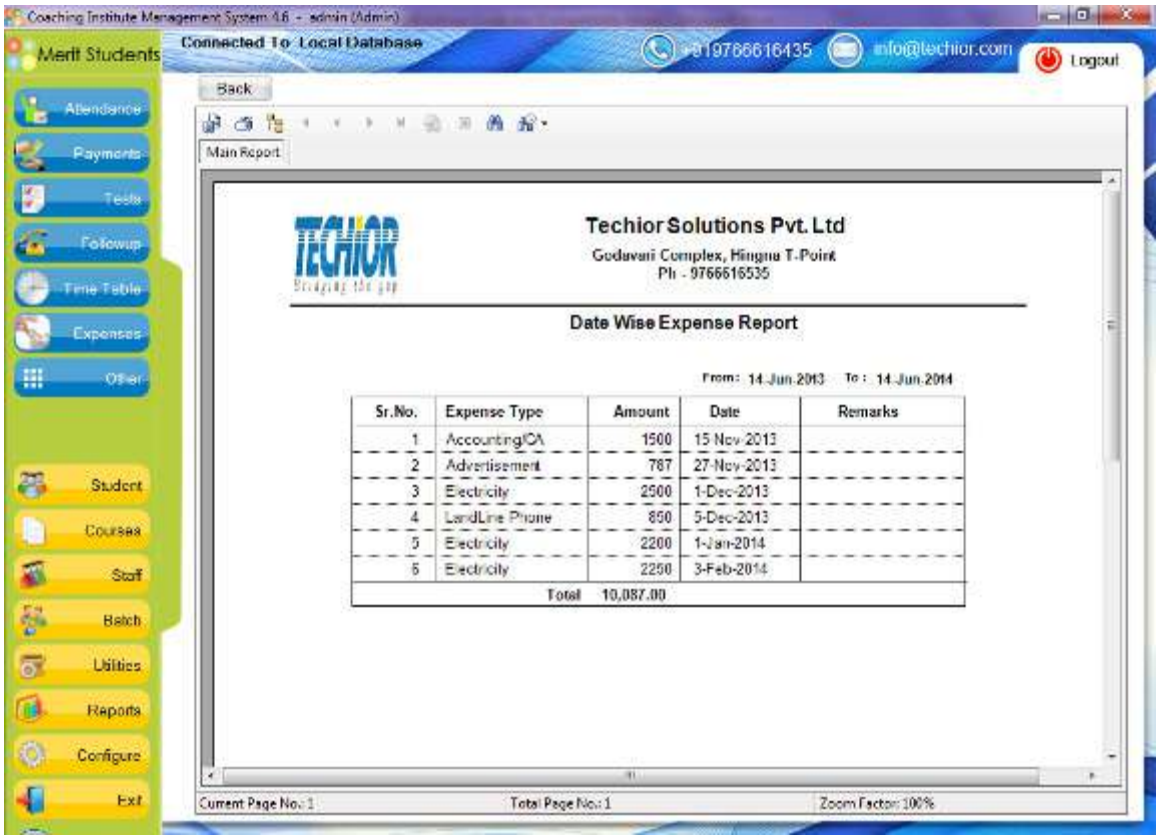
Selecting room number from the dropdown and click on “Go” to generate the time table.



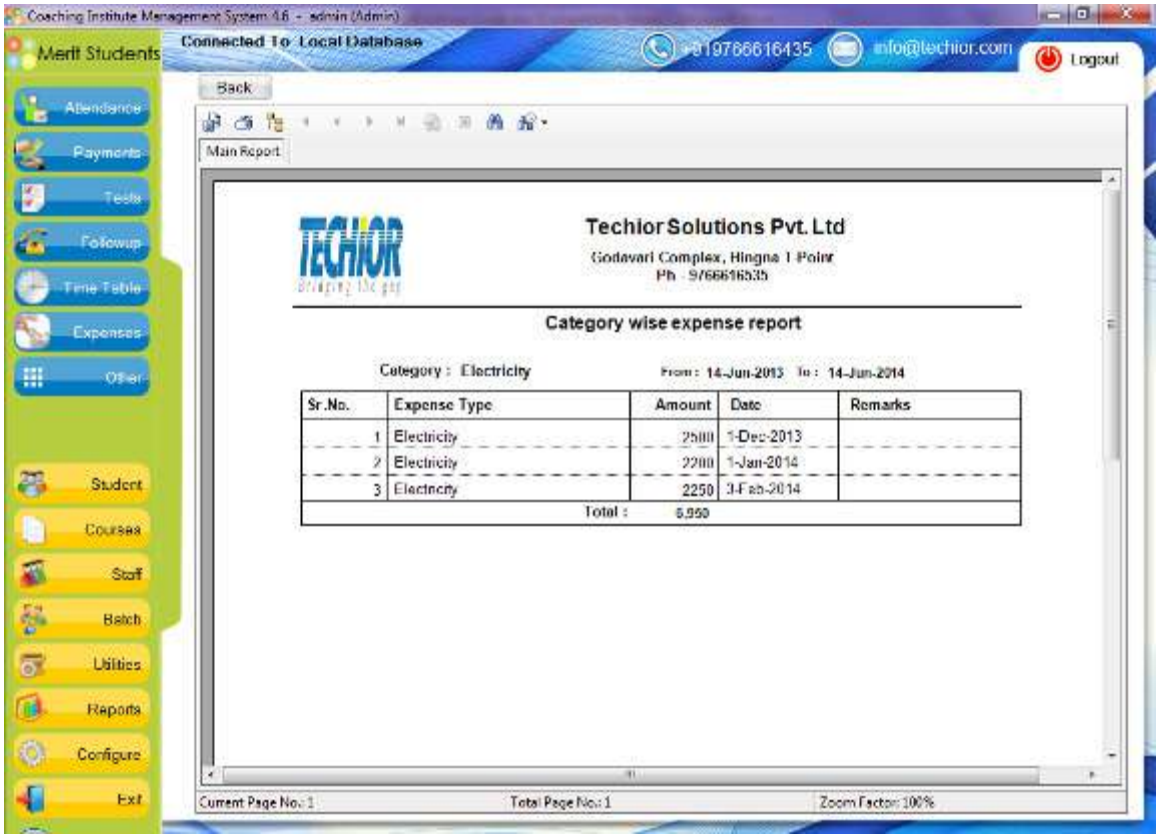
Expense Reports:

Under this category following reports are available

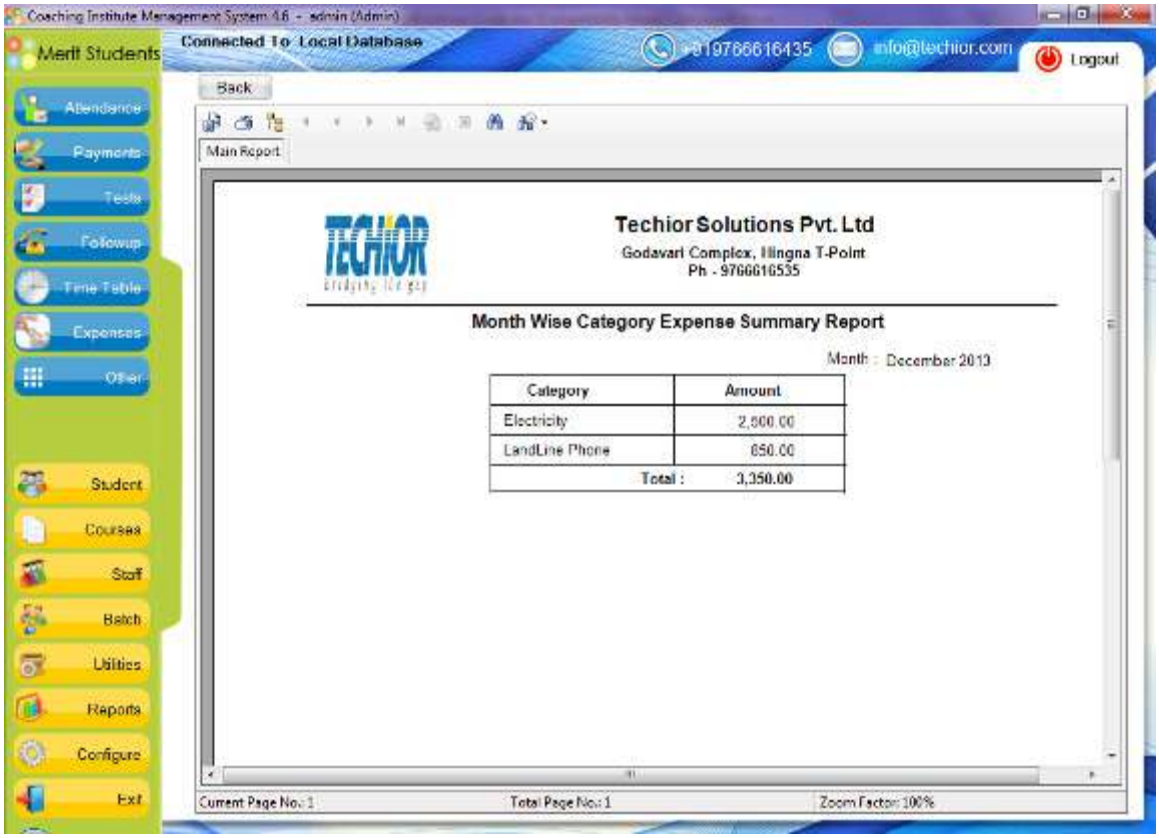
Date wise expense report: This report gives a list of all the expenses that have occurred within a given range of dates. Select the “From date” and the “To date” and click on “View” to see the report.



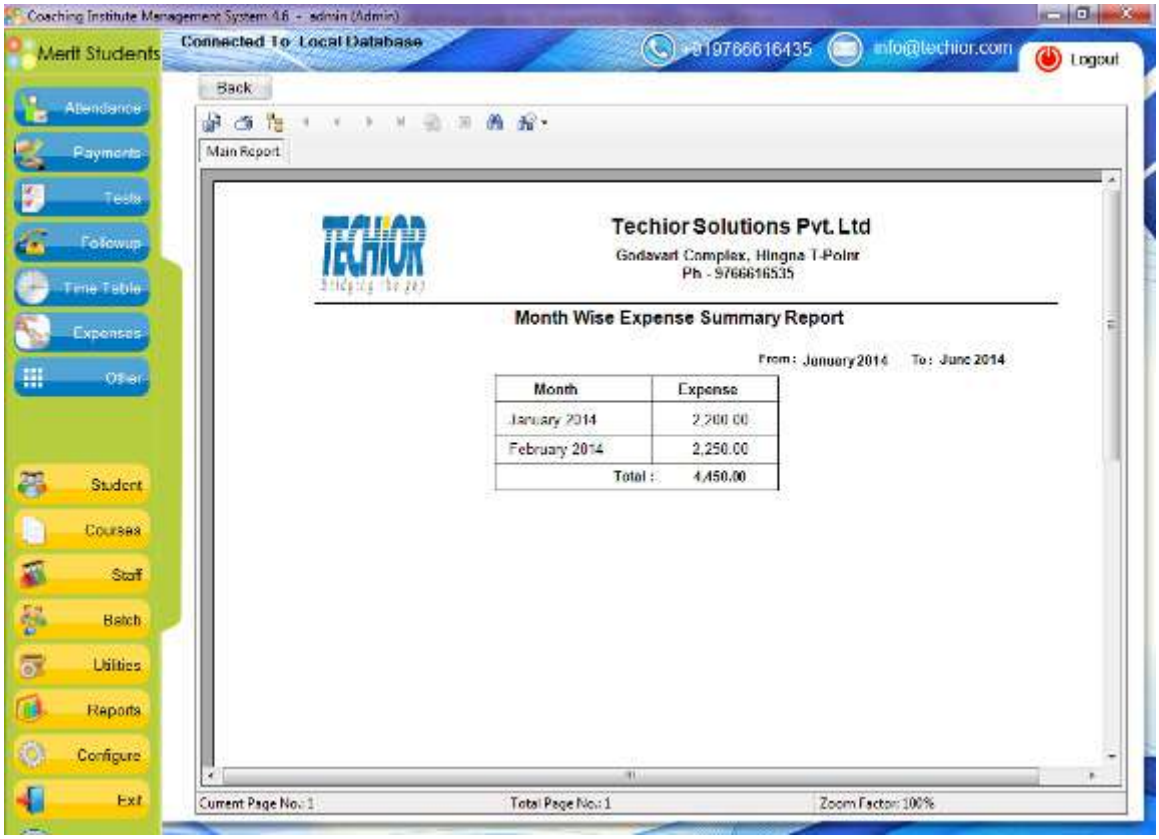
Category (Expense Type) wise expense report: This report gives the list of expenses that have occurred in a selected category within a given range of dates. Select the Expense Type, the “From date” and the “To date” and click on “View” to see the report.



Month wise category expense summary report: This report gives the complete expense report of the selected month along with the details about the expenses incurred in the various categories. Select the month for which you want to see the expense report and click on “View” to see the report.



Monthly expenses summary report: This report gives the total of the monthly expenses for each month in the selected range of months. Select the “From Month” and the “To Month” and click on “View” to see the report.

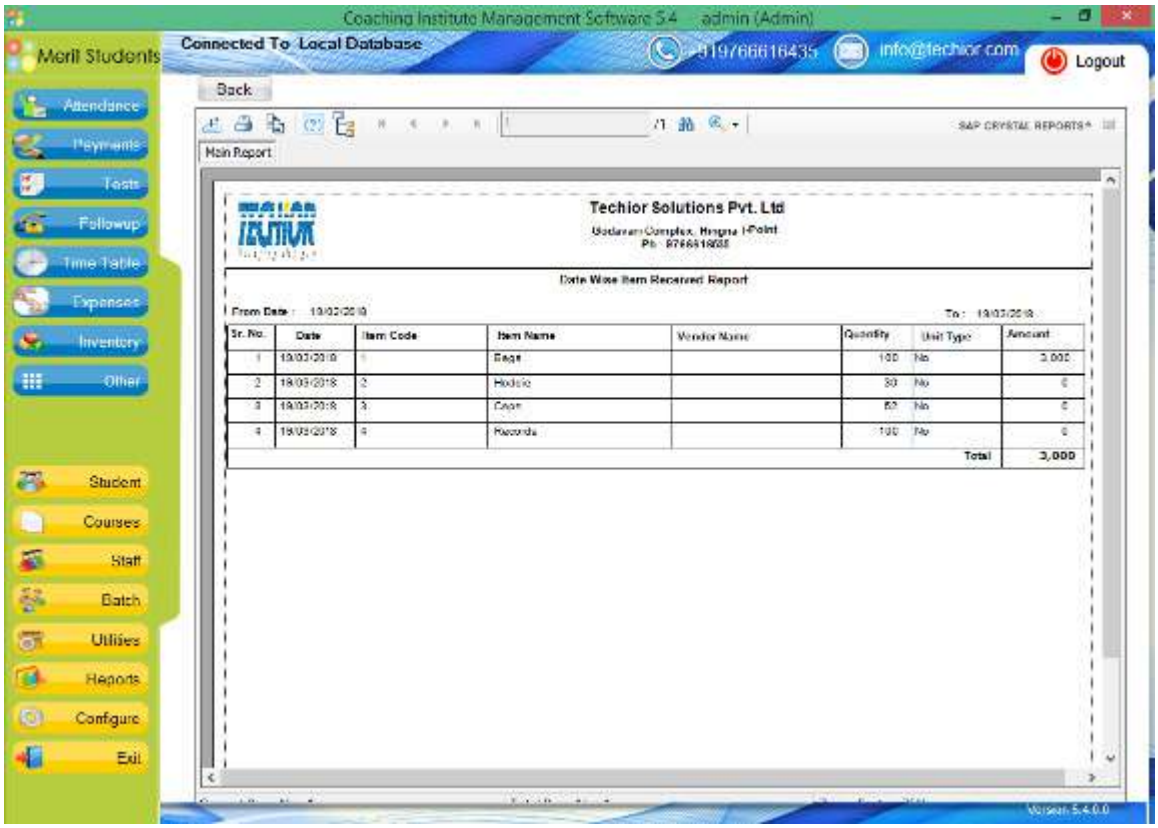


Inventory Reports:

Under this category following reports are available

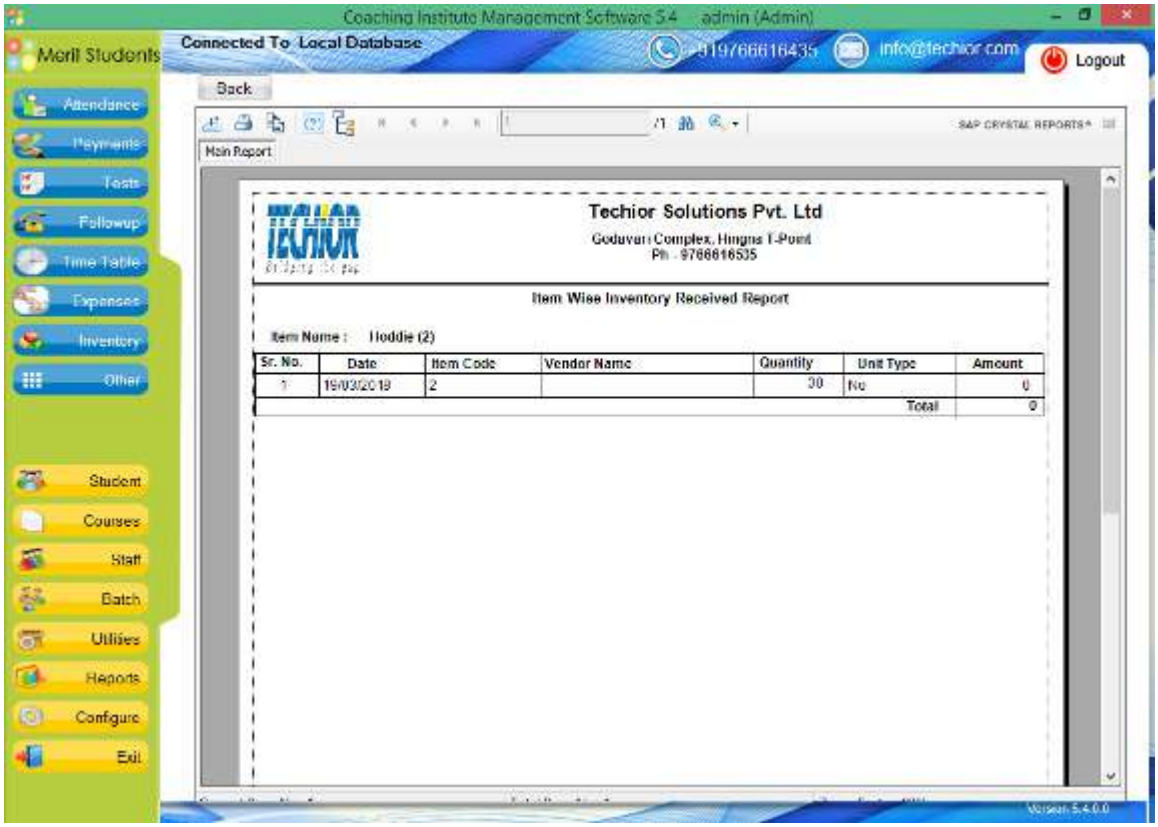
Date wise Items Received Report:

This report gives a list of the items which have been received to institute within a specified range of dates. Select the “From Date” and the “To Date” and click on “View” to view the report.



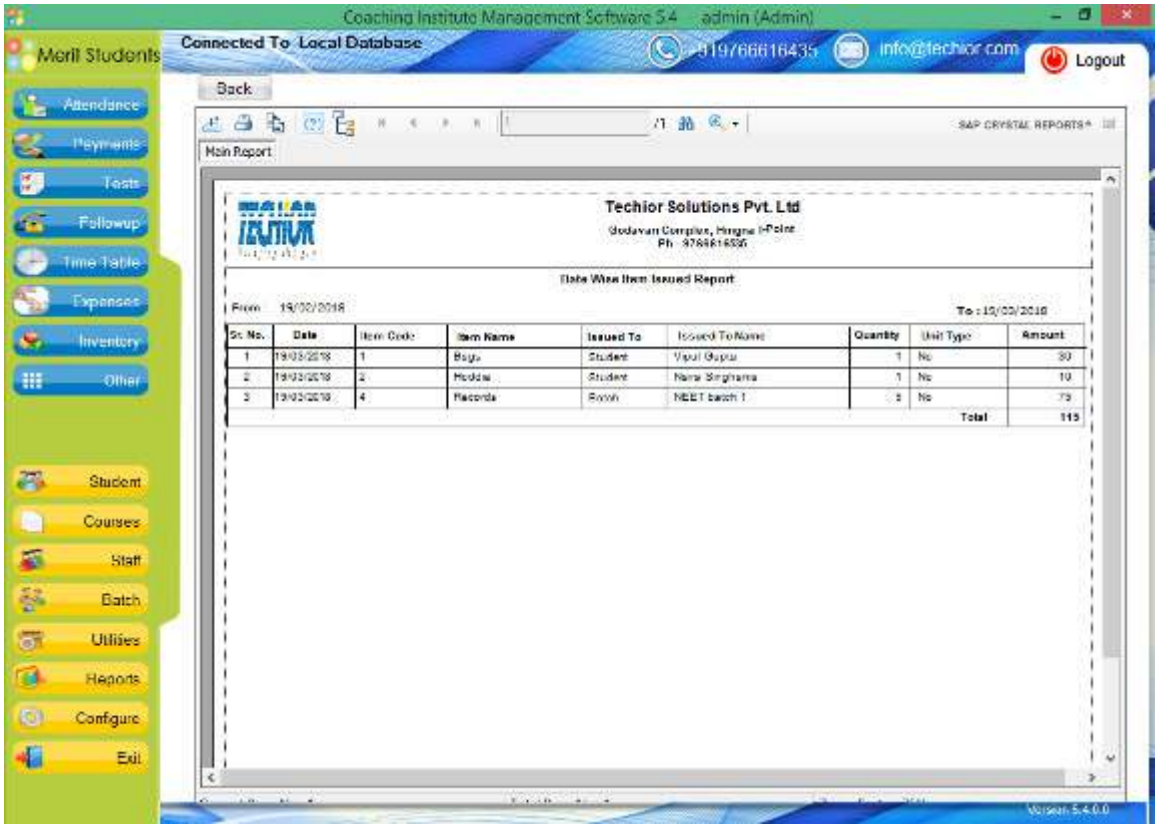
Item wise Received Report:

This report gives an information about items which have been received to institute. Select item name & click on “View” to view the report.



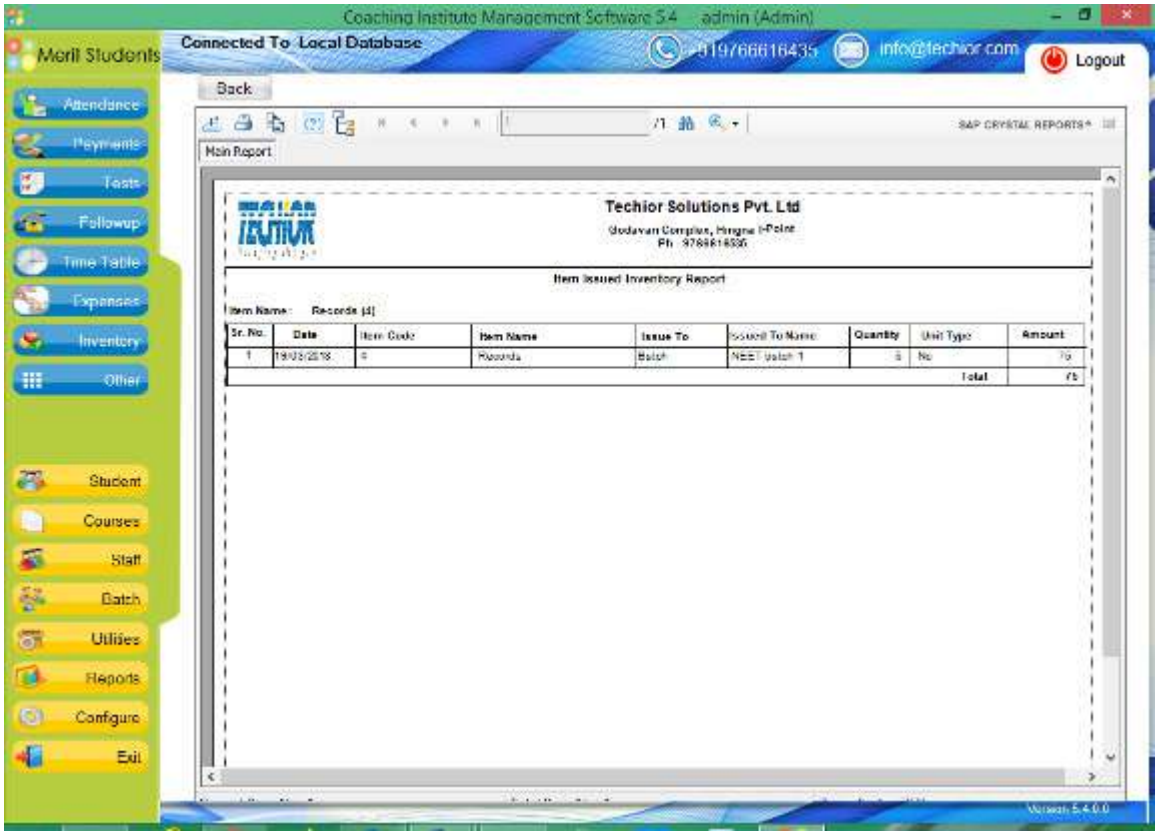
Date wise Issued Report:

This report gives a list of the items which have been issued to student, staff & batch within a specified range of dates. Select the “From Date” and the “To Date” and click on “View” to view the report.



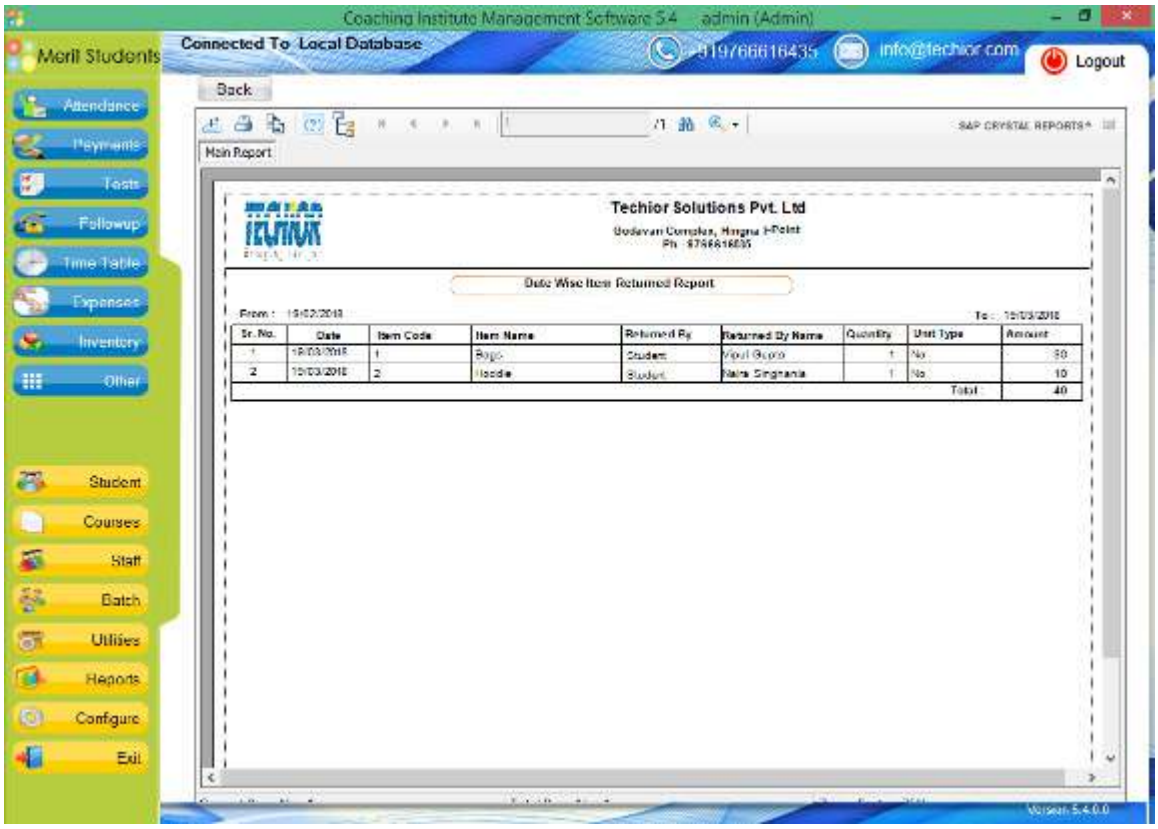
Item wise Issued Report:

This report gives an information about the items which have been issued to student, staff or batch. Select the item name and click on “View” to view the report.



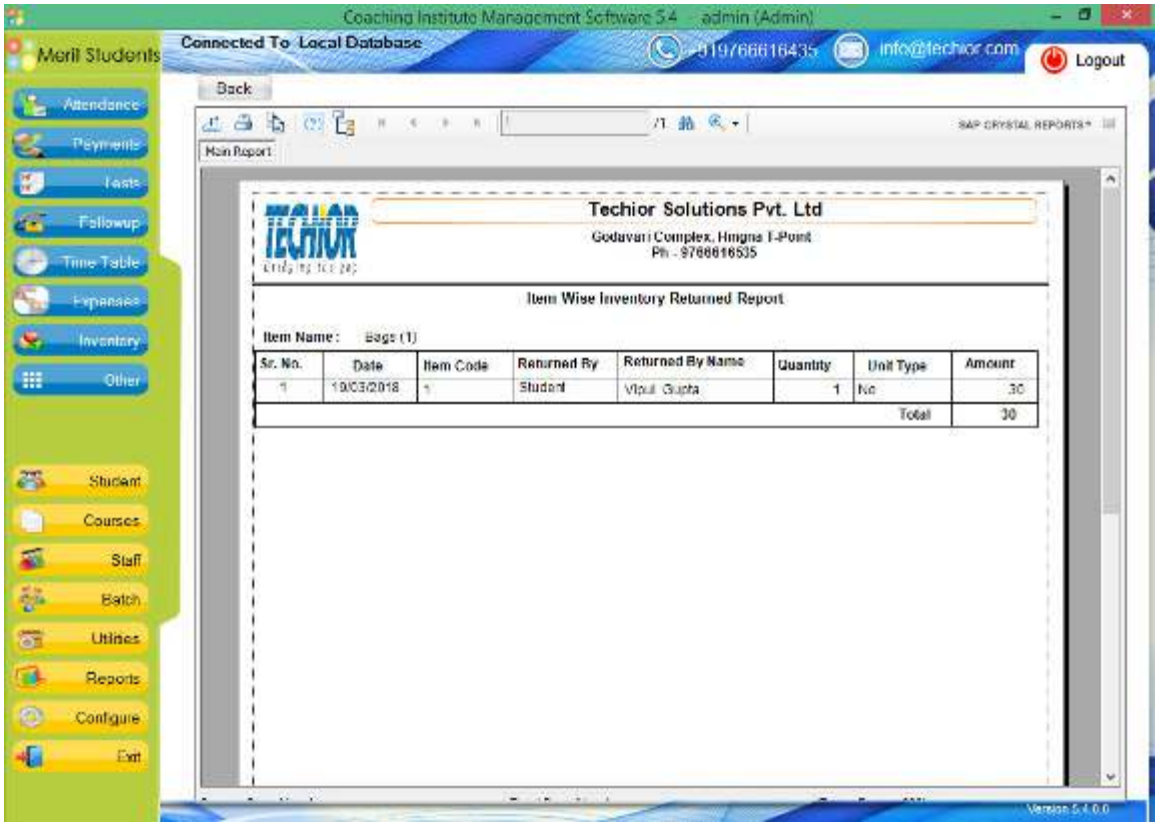
Date wise Returned Report:

This report gives a list of the items which has been taken returned from students, staff or batch within a specified range of dates. Select the “From Date” and the “To Date” and click on “View” to view the report.



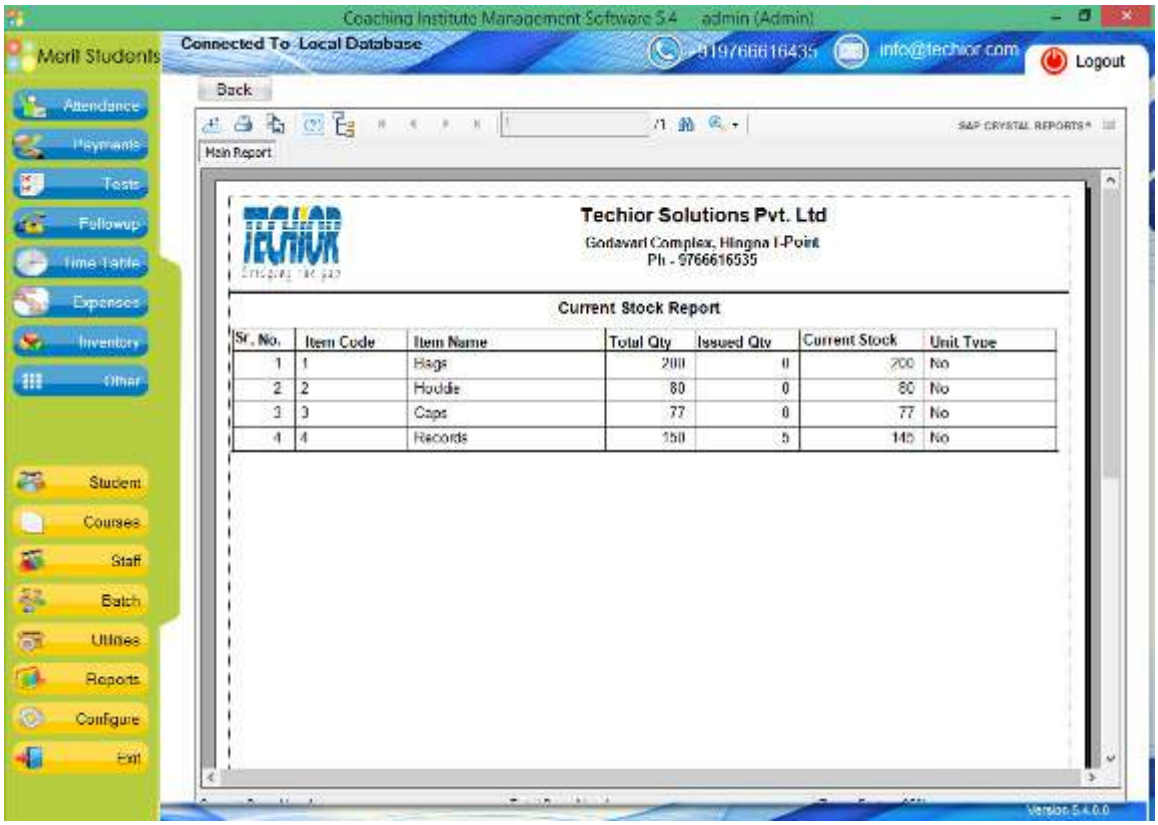
Items wise Returned Report:

This report gives an information about the items which have been taken returned from student, staff or batch. Select the item name and click on “View” to view the report.



Current stock Report:

This report gives an information about the current stock of the items available. Select the item name and click on "View" to view the report. You can also view report for all the items currently present in stock.

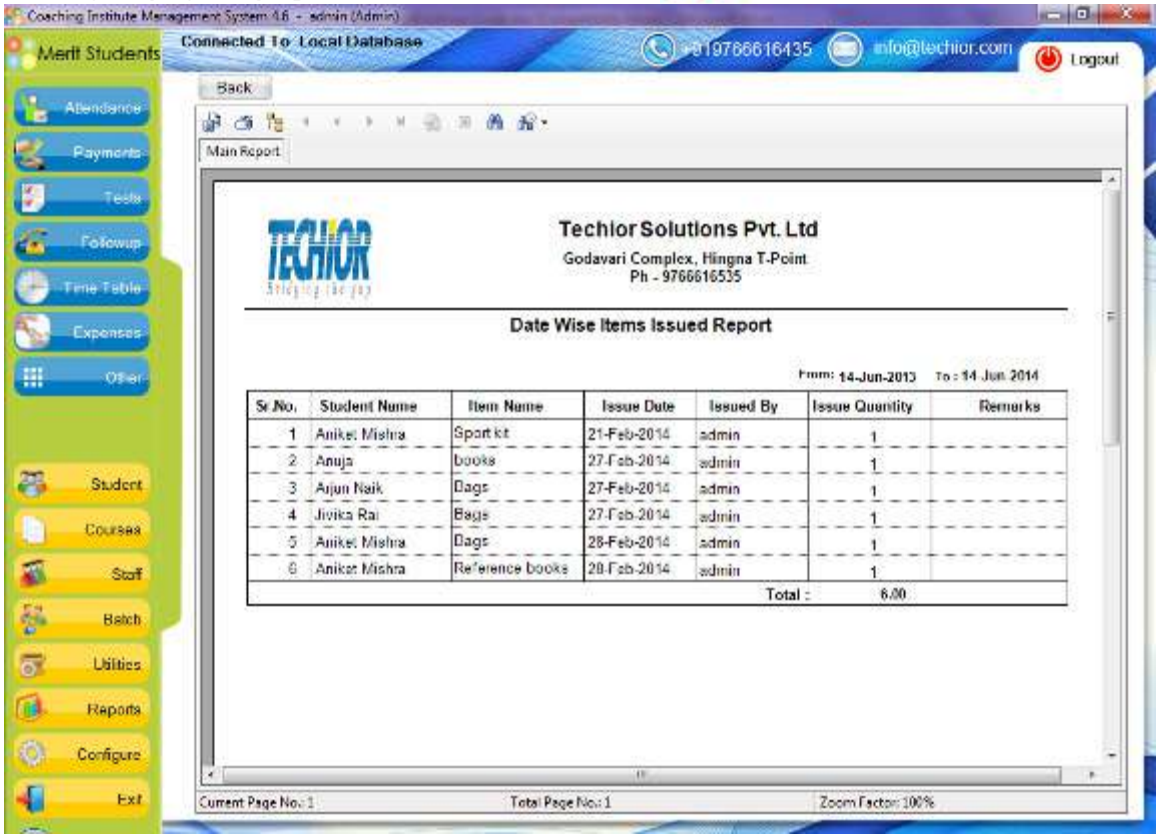


Other Reports:

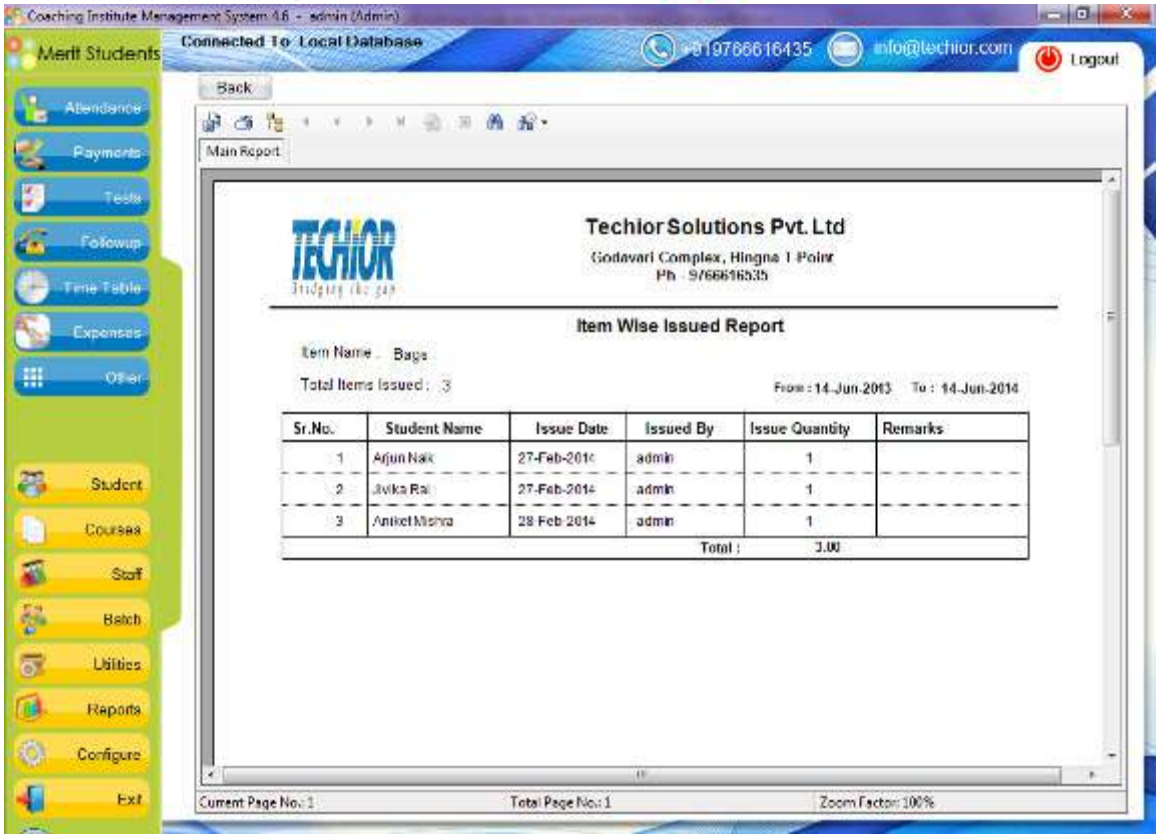
The following reports are available in the other reports.

Issue Item Reports:

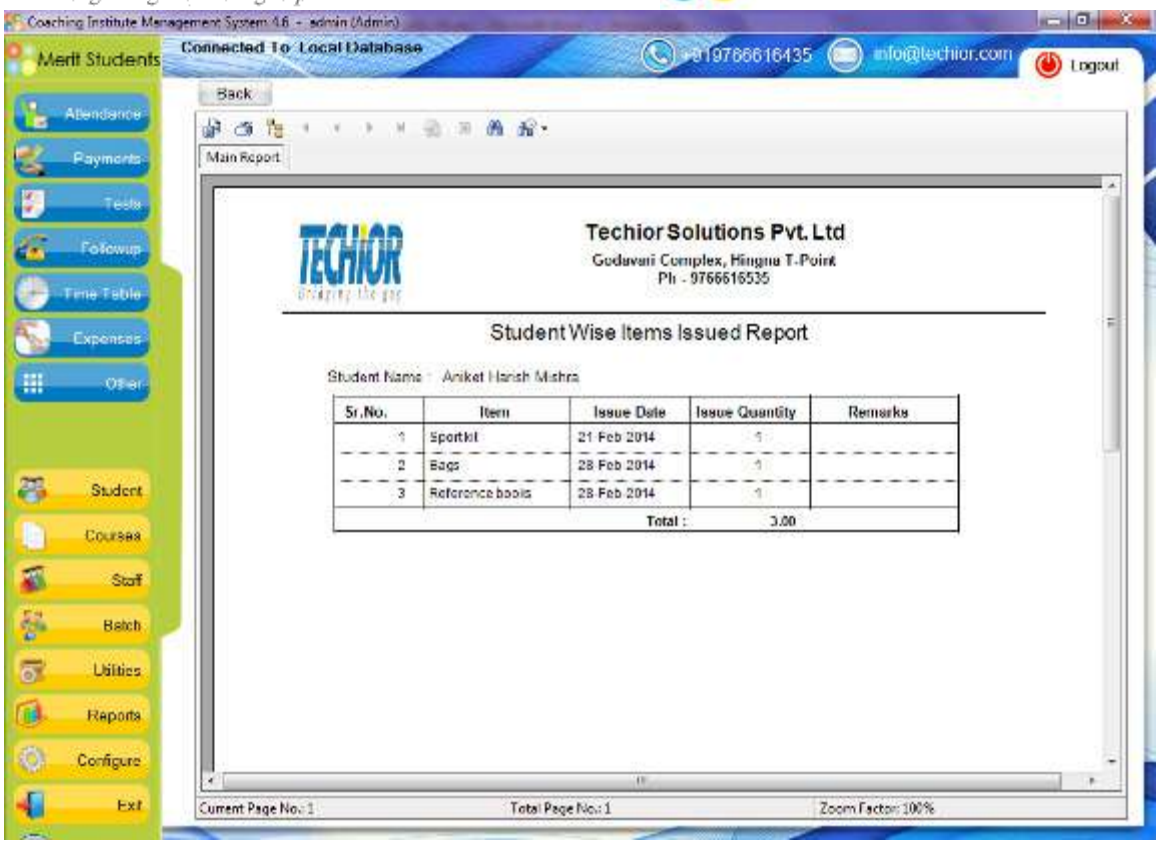
1. **Date wise Items Issued Report:** This report gives a list of the items which have been issued to students within a specified range of dates. Select the "From Date" and the "To Date" and click on "View" to view the report



2. Item wise Issued Report: This report helps us to keep track of how many numbers of a particular item have been issued to students and also to whom. Select the “Item name”, the “From Date” and the “To Date” and click on “View” to view the report.

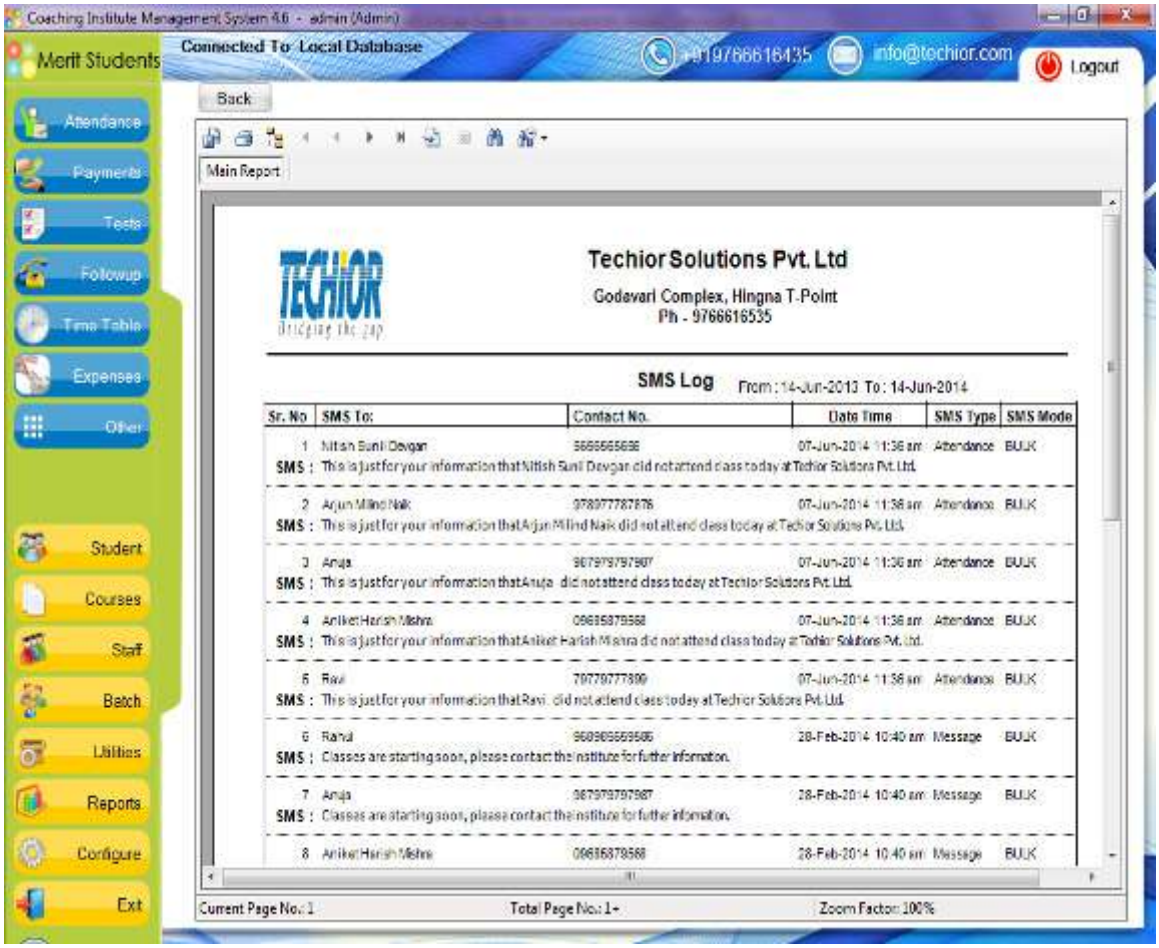


3. Student wise Items Issued Report: This report can be used to see the list of items which have been issued to a particular student. Select the name of the student, and click on “View” to see the report.



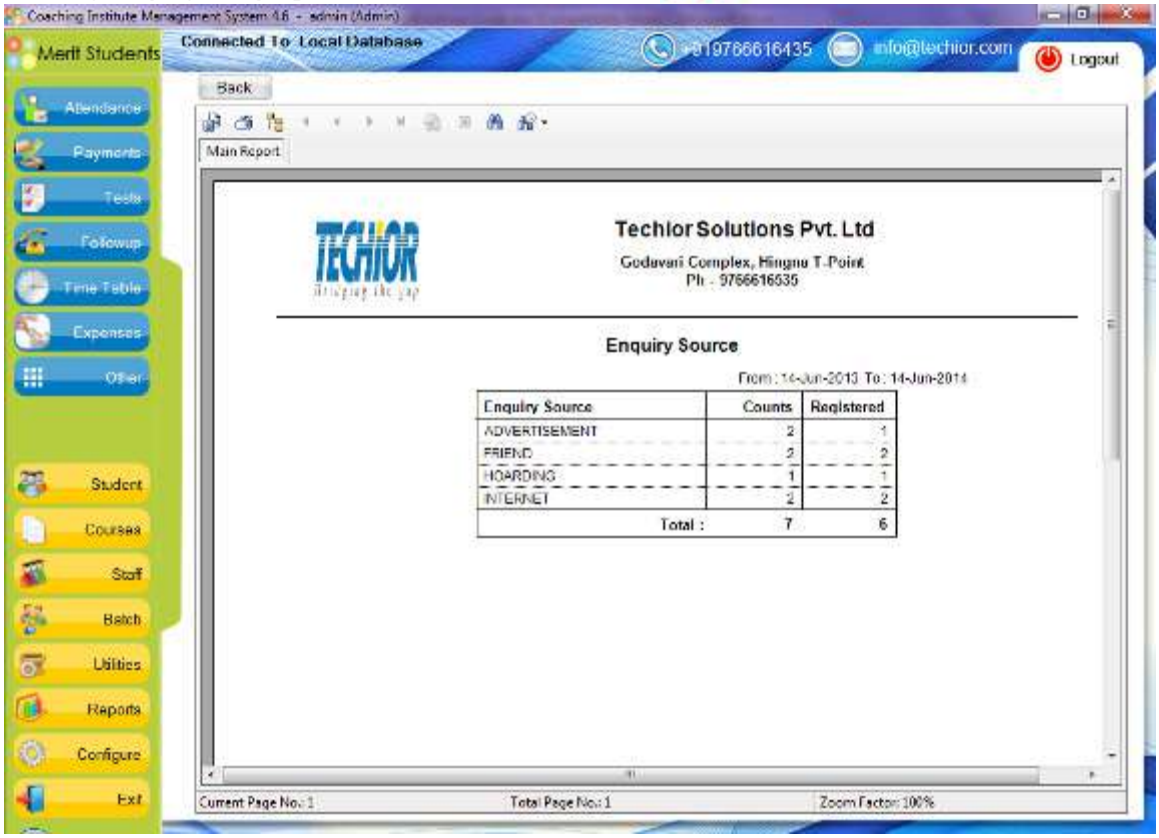
SMS Log

All the messages sent to the students (Related with Birthday wish, payment reminder, Attendance, Outstanding payment, test marks) can be seen in SMS log.
Click on SMS log on left side, select the date range & click on go will produce the SMS log as shown below.



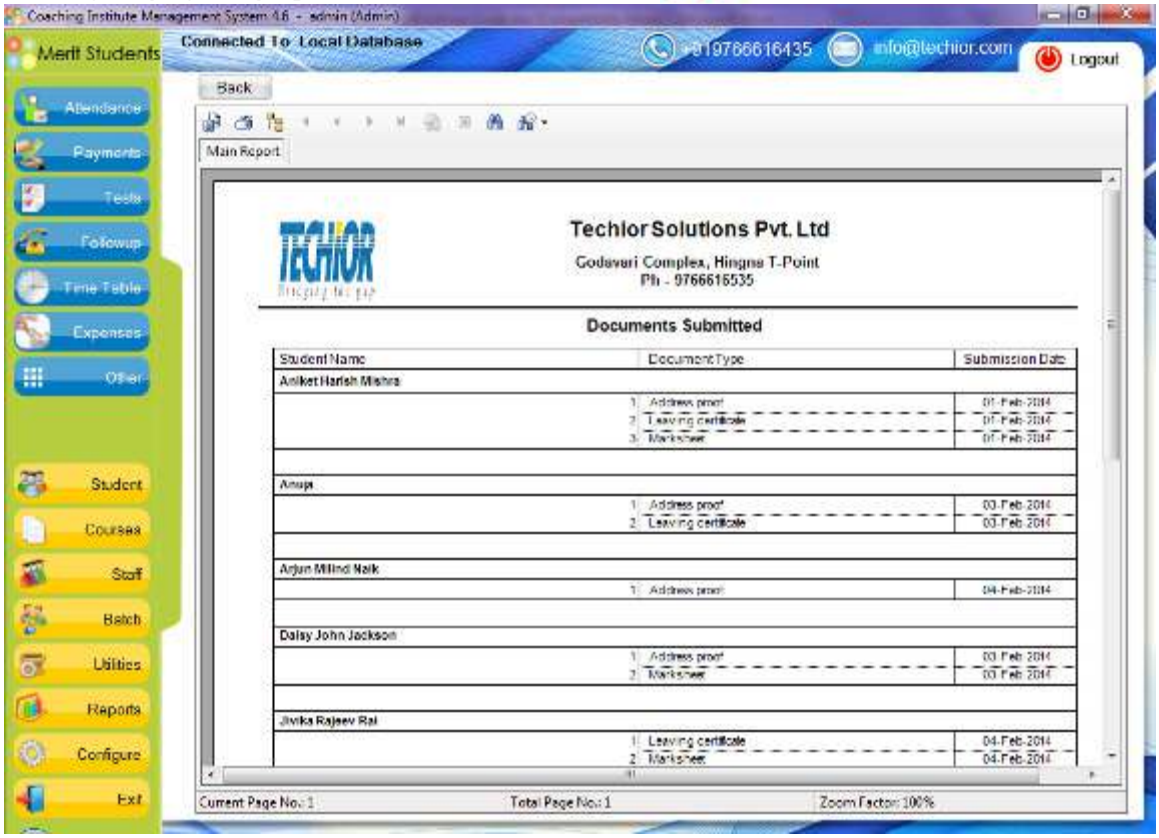
Enquiry Source Report

This report is used to keep the record of the students those who are approached by different sources. On the enquiry form as the student select “Where did you hear about us” & select any source, this information will help to generate the report.



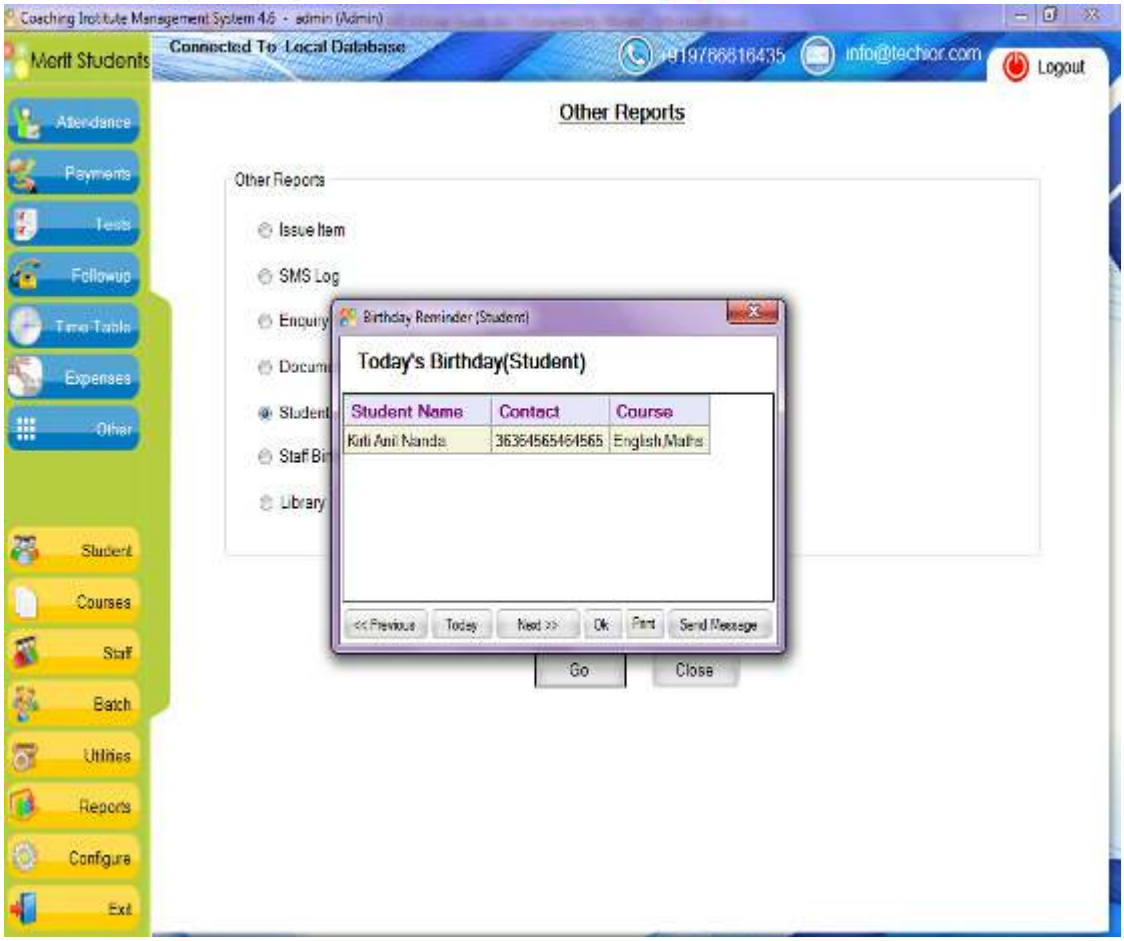
Document Reports: This report is used to keep the record of the various type of documents submitted or not submitted by the students. The report can be generated for a batch, for a student or date wise.

Documents submitted report:



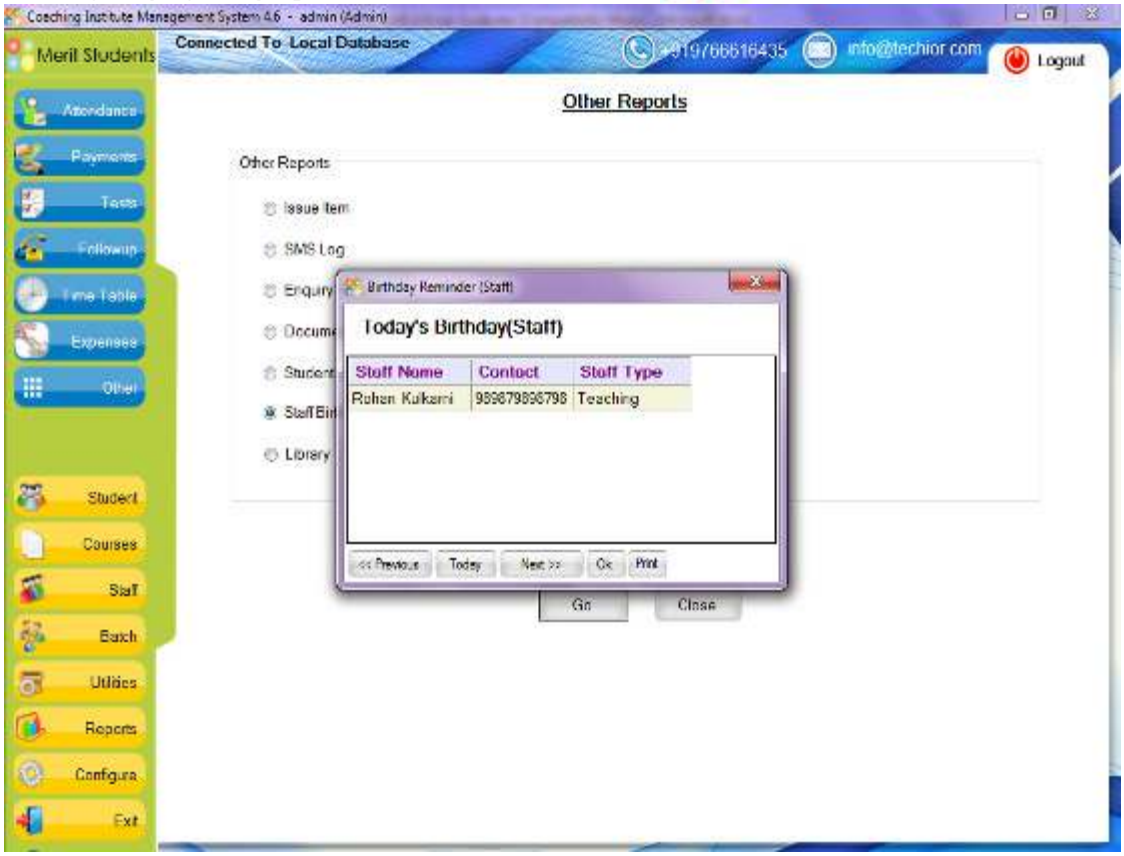
Student Birthday:

Here select the student birthday reminder & click on go, it shows the pop up reminder for student birthday.



Staff Birthday:

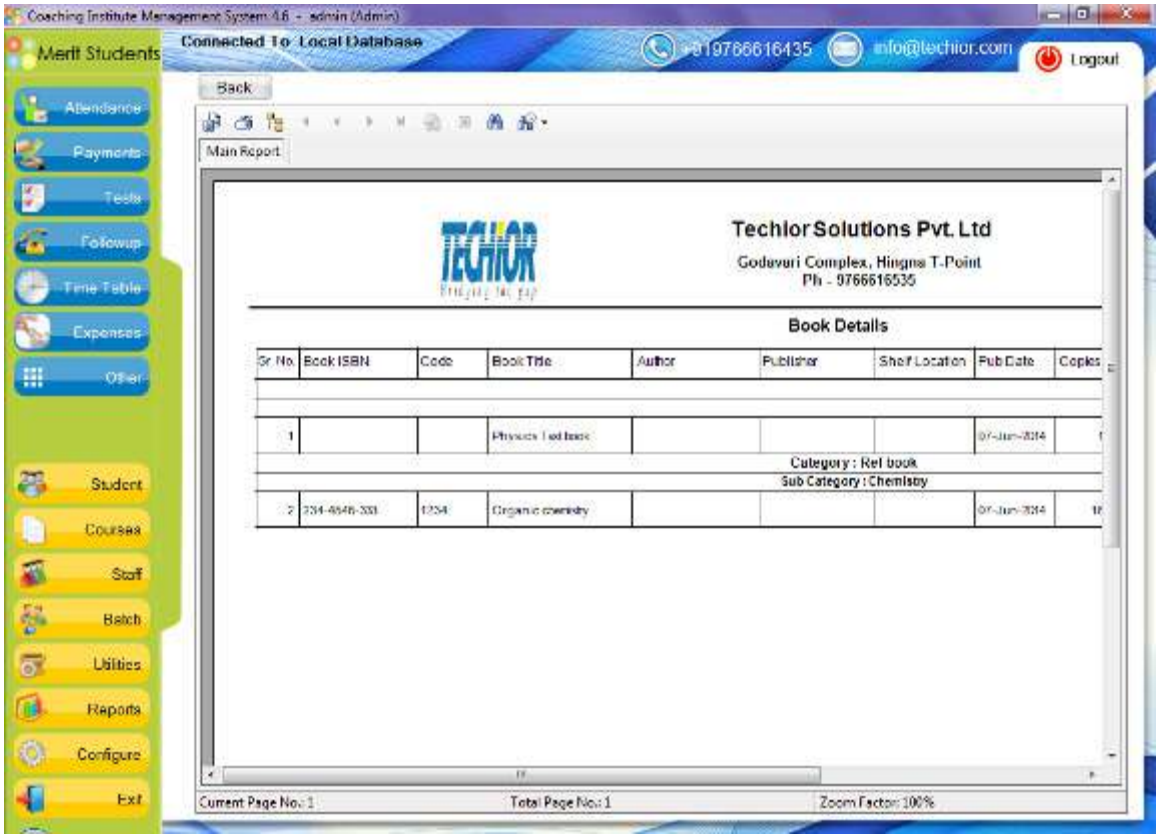
Here select the staff birthday reminder & click on go, it shows the pop up reminder for staff birthday.



Library Report:

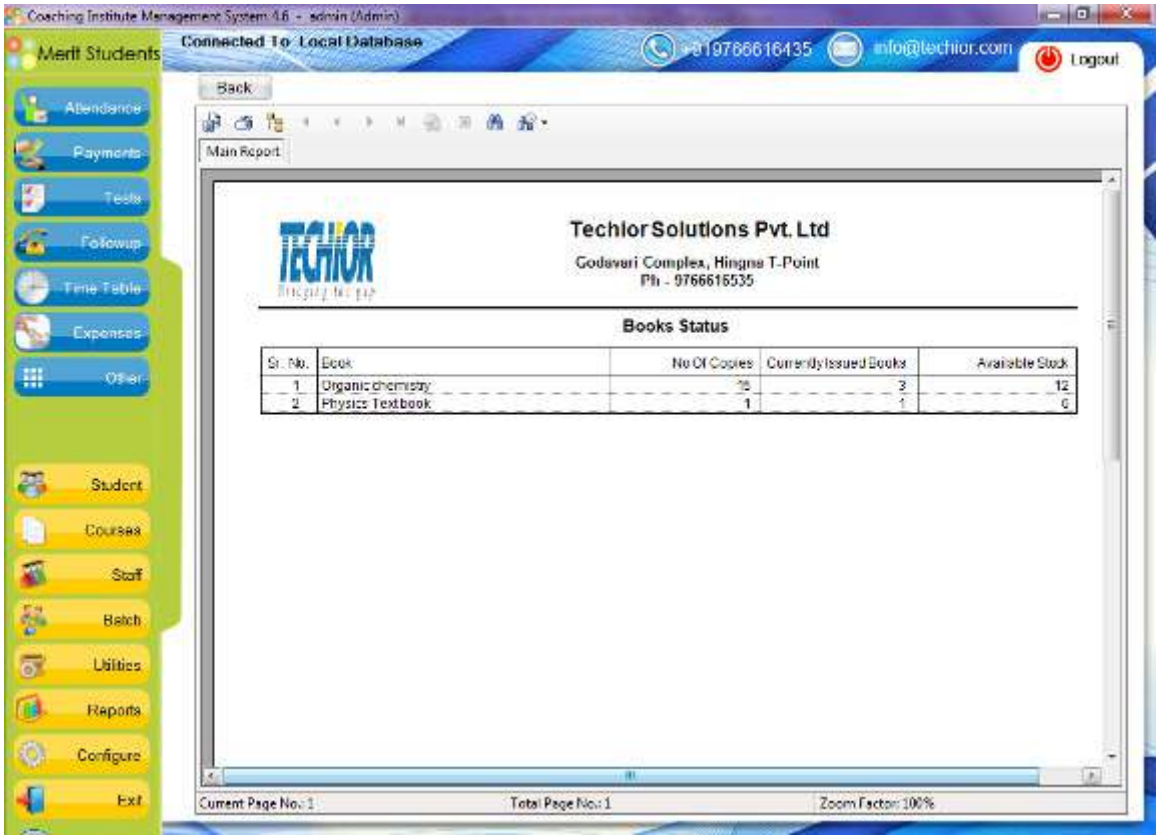
This report is used to keep the record of the various type of books available along with the details of the different types of books.

Book details:



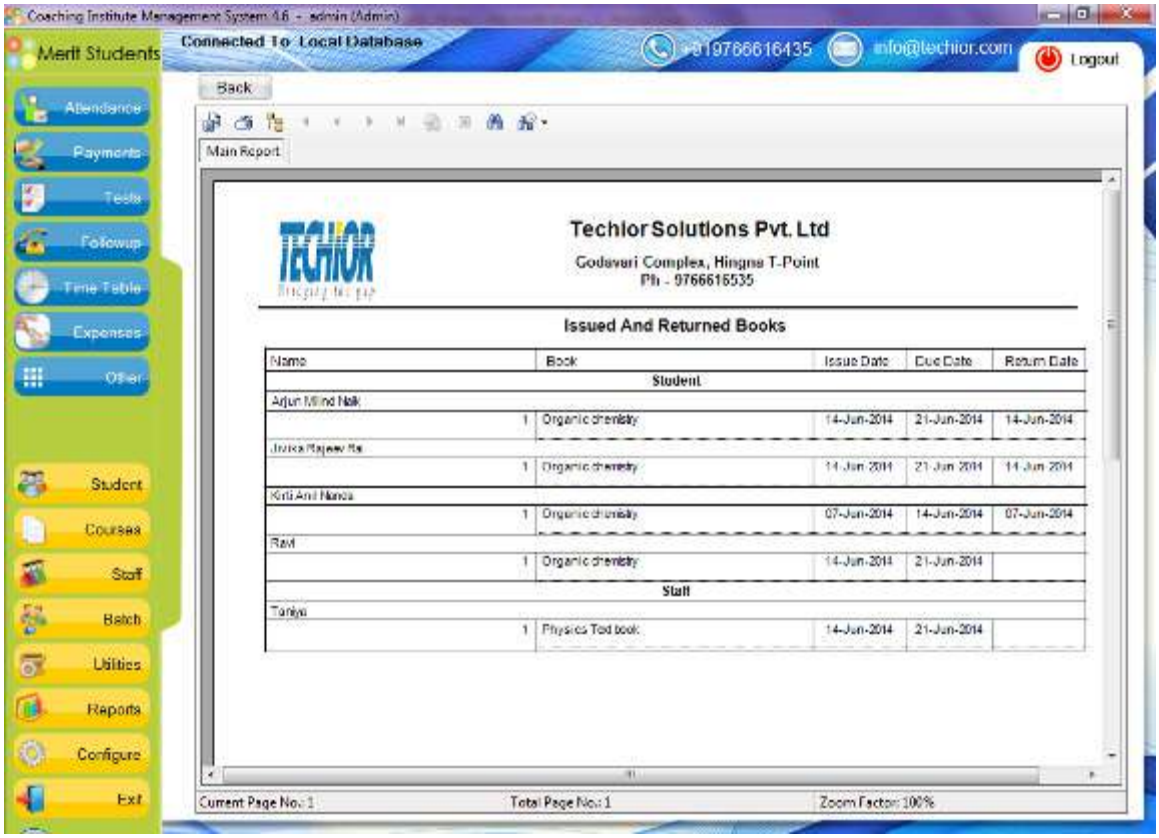
Book Status:

This report is used to keep the record of the various type of books Issued & number of books in stock.



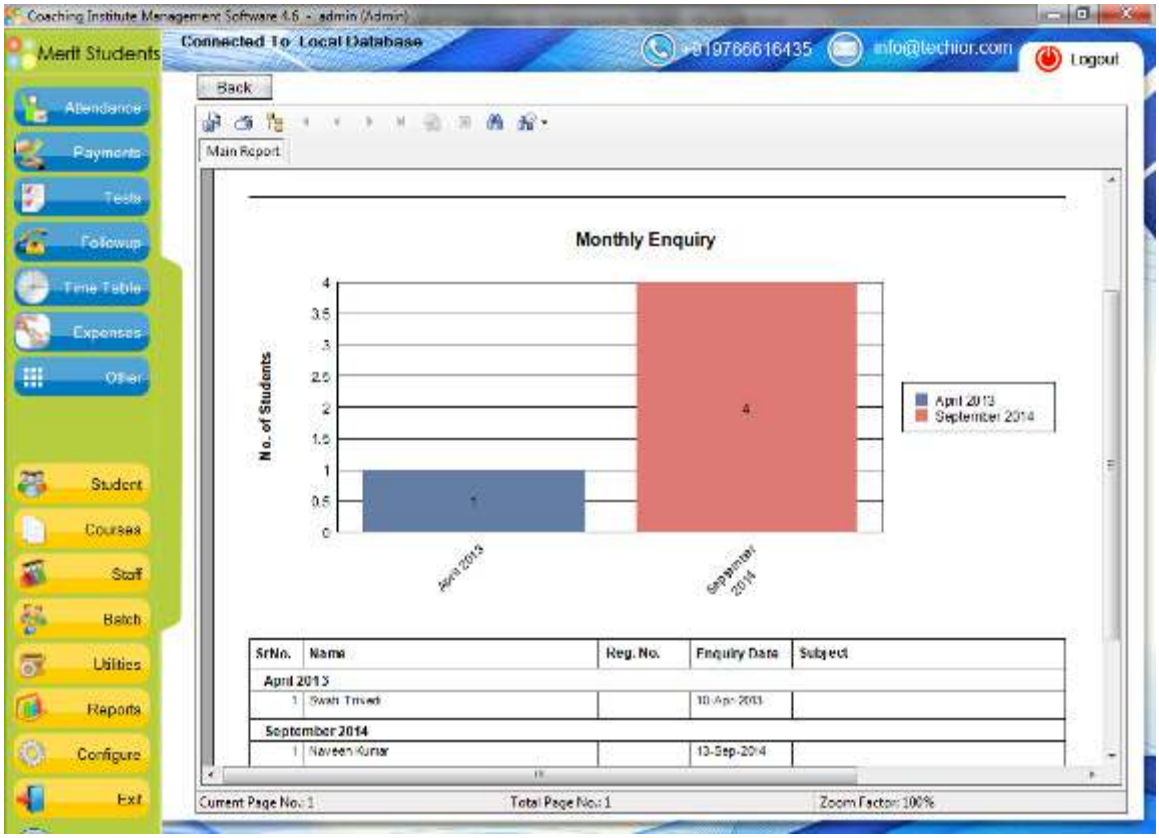
Issued & Returned books:

This report is used to keep the record of the various type of books Issued & returned by student & staff.



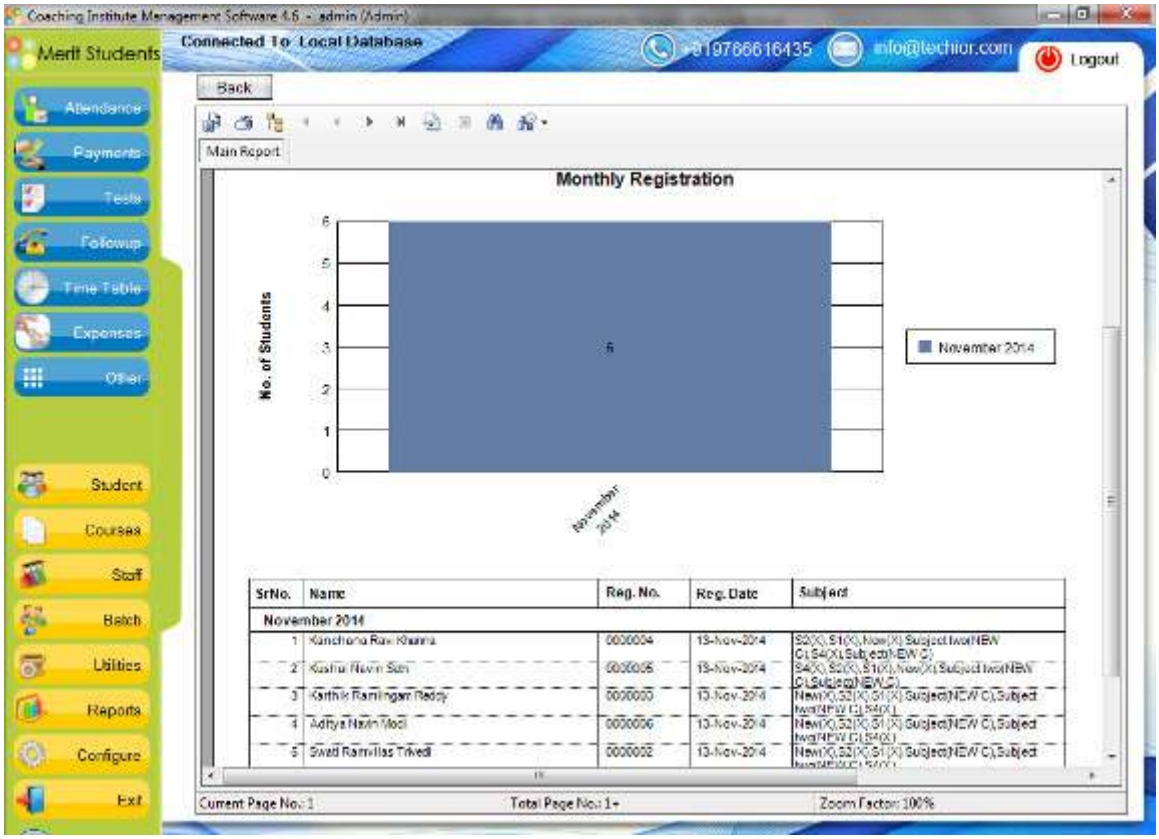
Date wise enquiry:

Here the report will be generated for the enquiries between particular date range, monthly or weekly.



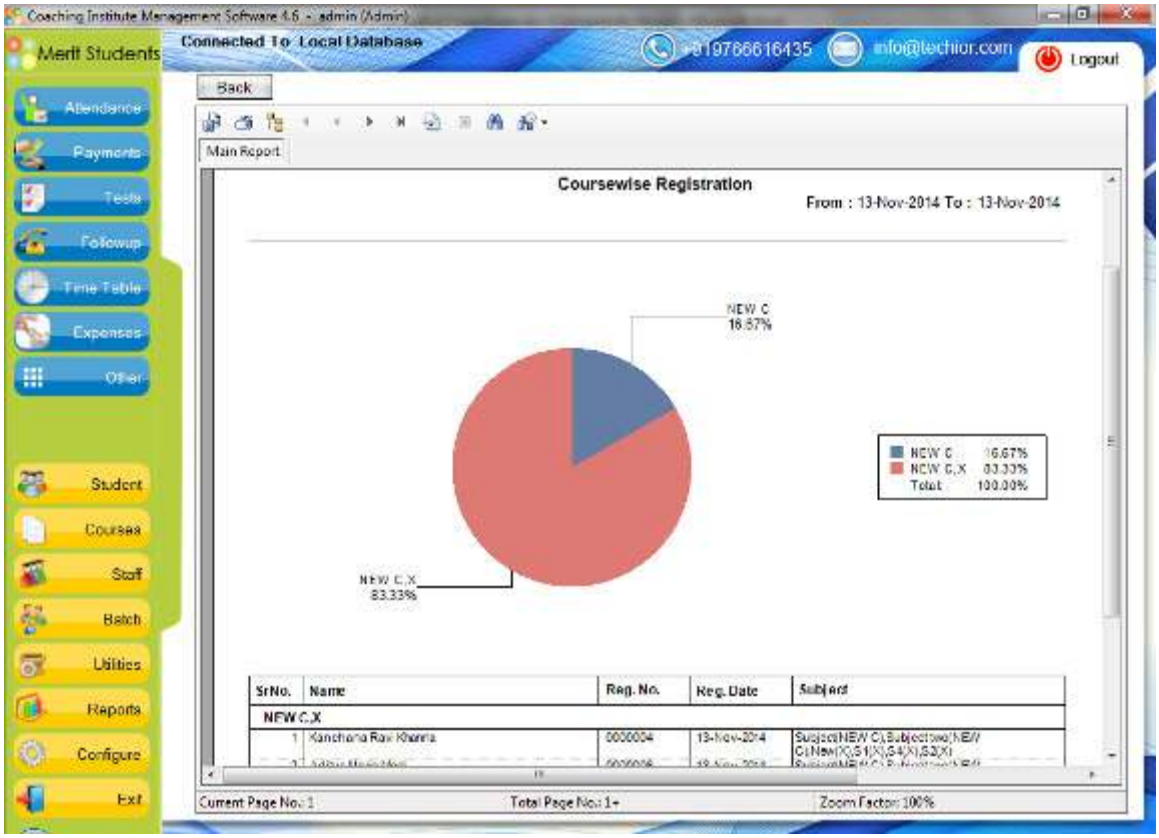
Date wise registrations:

Here the report will be generated for date wise registrations.



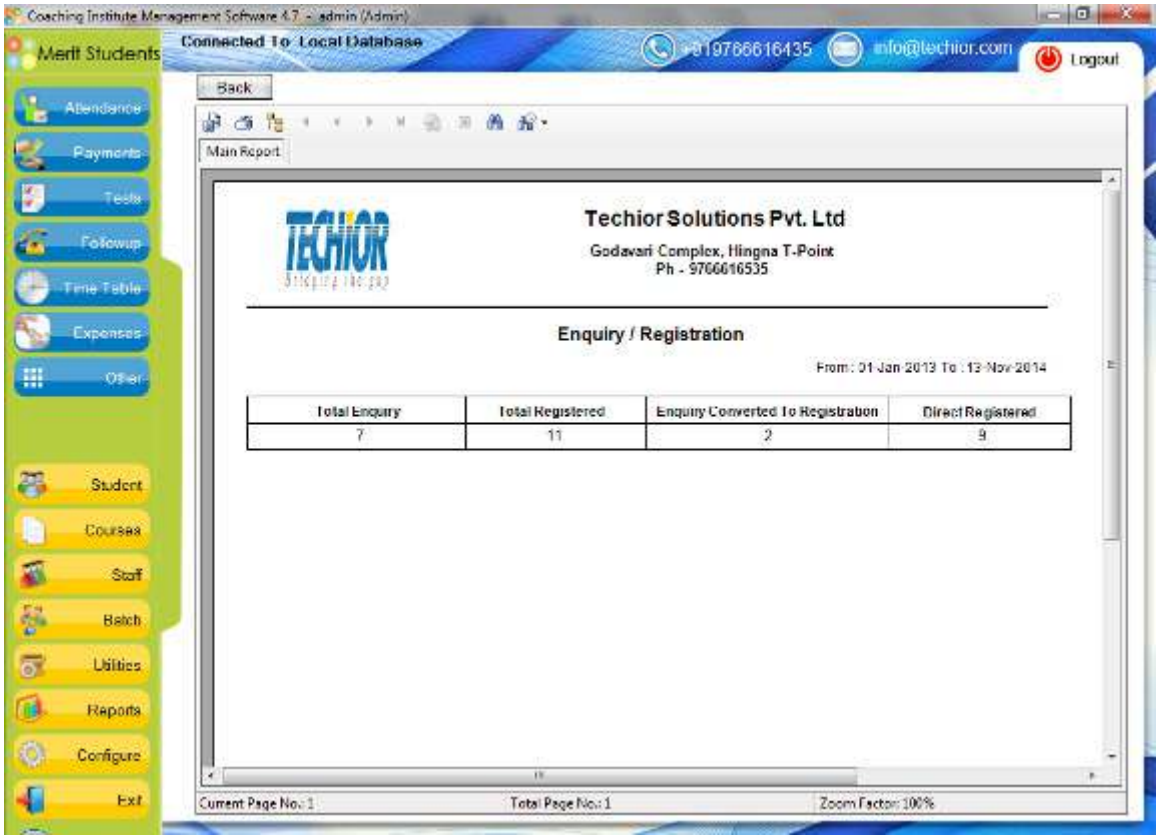
Course wise registration:

Report will be generated for course wise registrations,
Give date range & click on generate report.



Enquiry to Registrations:

Report will be generated showing the ratio of enquiries converted to registrations.


Coaching Institute Management Software 4.7 - admin (Admin)
Merit Students
Connected To Local Database
+919766616435
info@techior.com
Logout
Back
Main Report
Attendance
Payments
Tests
Followup
Time Table
Expenses
Other
Student
Courses
Staff
Batch
Utilities
Reports
Configure
Exit
Techior Solutions Pvt. Ltd
Godavari Complex, Hingna T-Point
Ph - 9766616535
Enquiry / Registration
From : 01-Jan-2013 To : 13-Nov-2014
Total Enquiry | Total Registered | Enquiry Converted To Registration | Direct Registered
7 | 11 | 2 | 9
Current Page No.: 1
Total Page No.: 1
Zoom Factor: 100%