



Student Management Software (SMS)

Overview

SMS comprises a comprehensive system for managing Yeshiva, Seminary, Kollel or other similar TOIM.

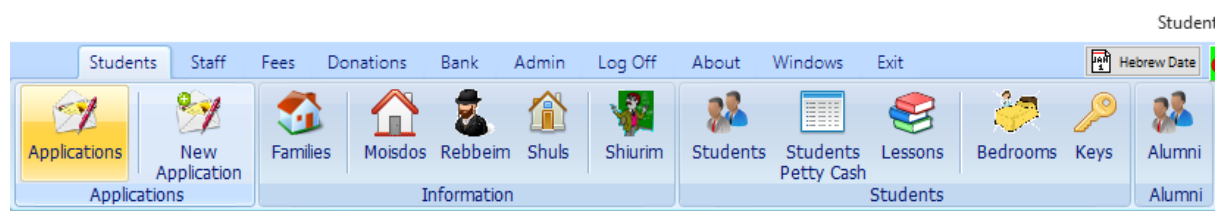
The software maintains a database of the students and alumni, staff pay, fees and other donations.

It provides a straight-forward method of maintaining collecting lists based on data entered. In addition, it keeps records of staff details, and the different shiurim in which students participate. It manages staff pay, donations and fees.

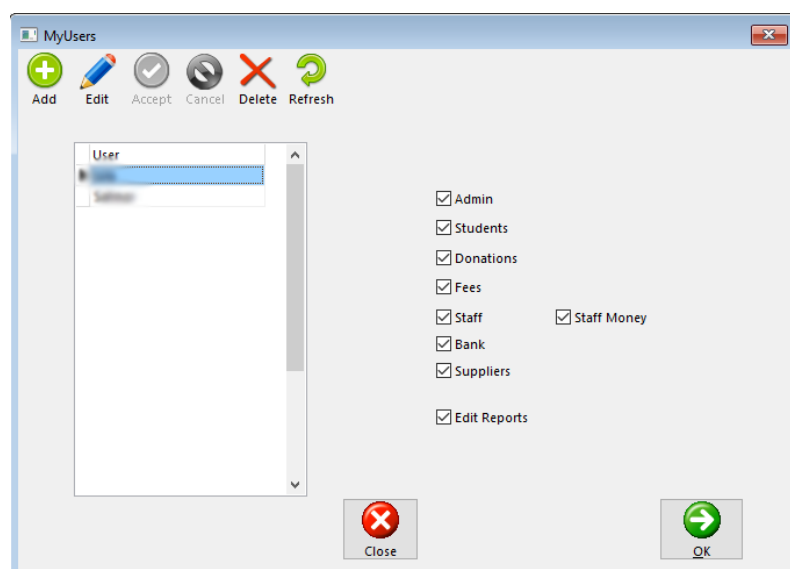
Main features

In General

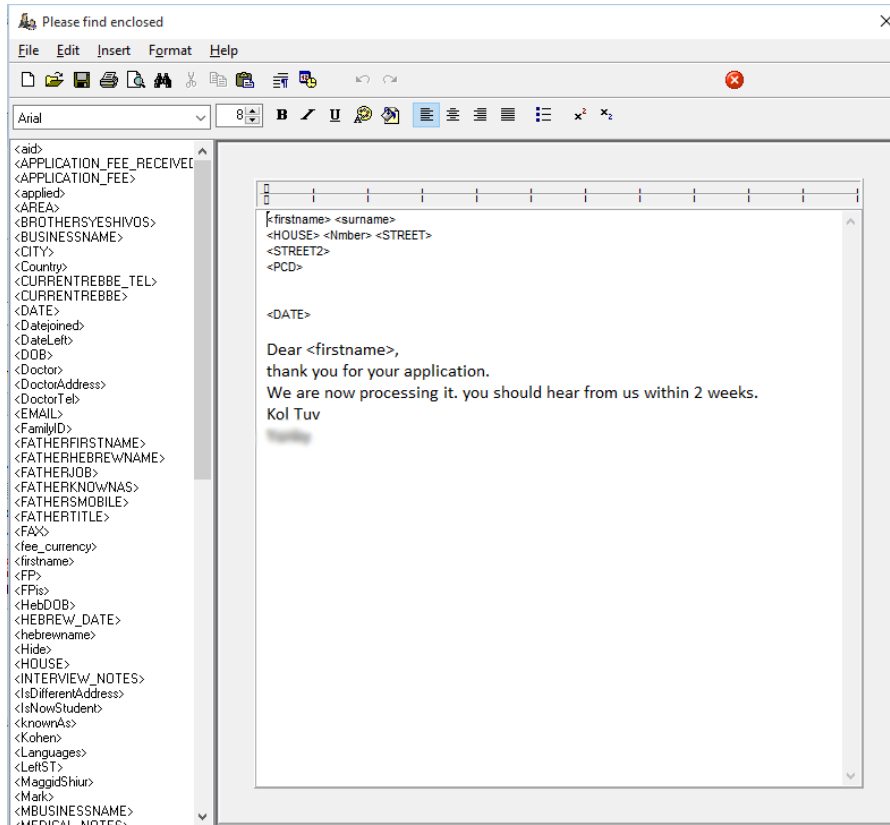
SMS is designed to be very easy to use. It uses a modern interface similar to Microsoft Office 2016. All tables can be printed or exported to a spreadsheet such as Excel.



Confidentiality: Different “Users” will have access to different features. For example some of the administration will be restricted from seeing financial detail, or medical details of students, or collecting lists etc. The settings are kept by a “Super Administrator”.



Correspondence: Different letter templates can be created, and are stored, enabling letters to be generated quickly and easily retrieved.



Logs: a log can be kept of any type of info related to a donor, fee payer student with the time and a short text. For example, when a phone call was made.

logdate	logtime	description
19/09/2016	09:43:33	Shmerel phoned to find out if he is coming this zman
19/10/2015	09:00:52	seems to be playing truant. tried calling. no answer

Email merge and print merge allows mail merge of letters to be sent to a chosen list of recipients.

This feature enables you to email a report as a PDF attachment to the chosen recipients.
Please ensure the report is suitable for emailing to every person! in the list you choose below

Choose source of recipients: Donors

In order to choose, maximize by clicking on the button >>

Choose Report to email: Visit Due

Choose email details: Setup email

Subject: testing

text of email: email body

Send!

Other reports can be created by the administrator with online assistance from the SMS programmer. These reports are saved in the database, and the resulting report can be filtered. This results in a powerful system for retrieving and printing information.

All these reports can be saved in standard PDF format and can be exported to excel, word etc.

Student Applications

SMS helps administer common tasks such as printing Application forms, associated letters, storing relevant information.

This includes photos of students, details of parents, and history of previous education. It stores references of previous rebbeim.

The screenshot shows a web-based application form titled "New Application" under the heading "Application details". On the left is a vertical sidebar with icons and labels for "Personal", "Family", "Address", "Medical", "References", "Application Fees", "Interview", and "Shiur". The "Personal" section is active. The main form area includes the following fields and controls:

- Text input fields for "firstname", "HebrewName", and "Known as".
- A "Surname" dropdown menu, a Hebrew name dropdown menu (containing "ישראל"), and a "Date of Birth" field with slashes for day and month.
- A "HebDOB" text input field and a "Primary Carer" dropdown menu (set to "FATHER").
- A "Passports" section with two rows. Each row has a "Passport" label, a "Number" text input, a "1st Name" text input, and a "Nationality" dropdown menu (one set to "UK").
- A "Languages" dropdown menu set to "ENGLISH".
- A large empty text area labeled "NOTES".
- A "Rotate" button with a circular arrow icon.
- At the bottom, there are "Cancel" and "Save" buttons.

Reports can be created to list all students' applications, or a selection.

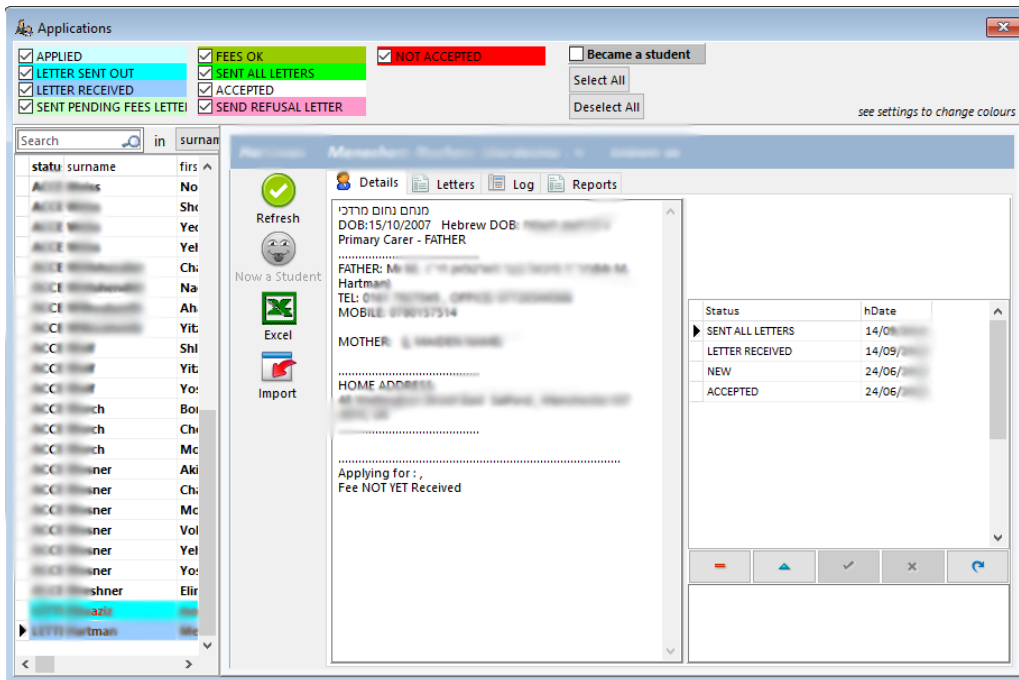
Confirmation of application is just a mouse-click away. If an application form is incomplete, the partially completed form is sent to the student clearly noting which information is still required.

SMS also manages application fees.

As applications to the טוּמ are processed they go through different stages.

For example, application form requested, letters sent out, received, application fees received etc. each stage can be stored in the program, with the date of reaching that stage.

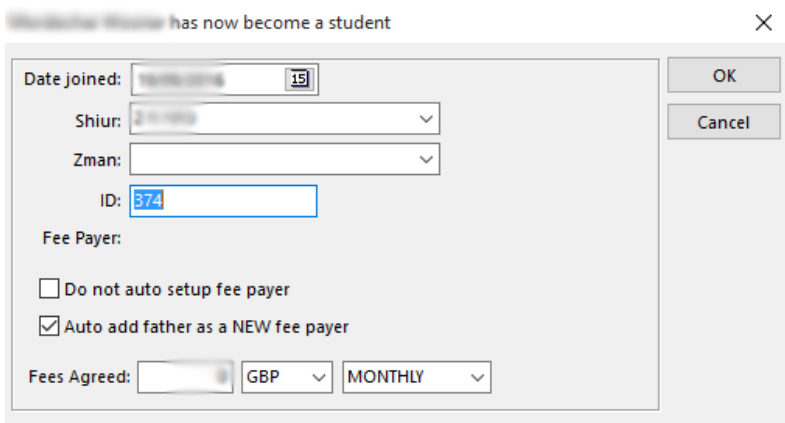
The list of applicants is colour coded according to the stage they are at, and easily filtered. In this way one can see immediately anyone who needs attention.



At a glance it is possible to retrieve info and generate letters.

When a student is marked as accepted, his details are easily updated so he joins the student body. All dates (when born, joined, left...) are stored.

The program suggests the fee arrangement to be set up. The fee payer (usually but not necessarily a parent) is automatically entered based on the student details. This makes all the details easy to enter.



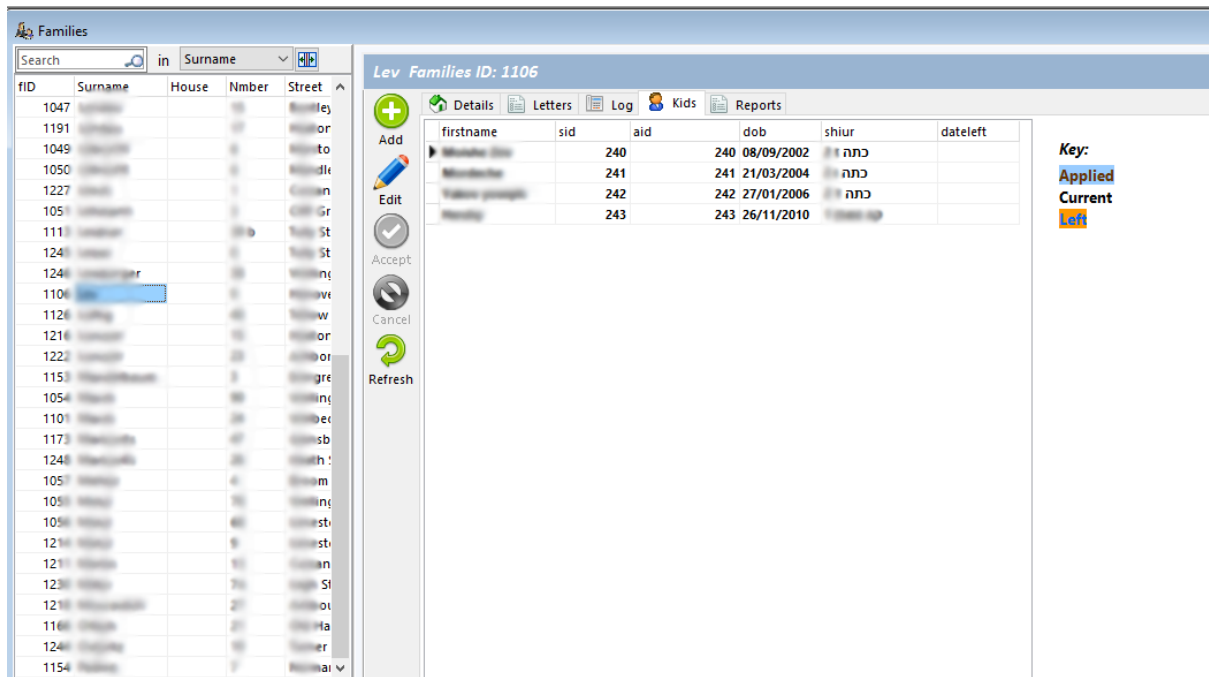
See later for more details regarding fees.

Family information

The database maintains family details separately but linked to the students. In this way it keeps track of different members of the same family.

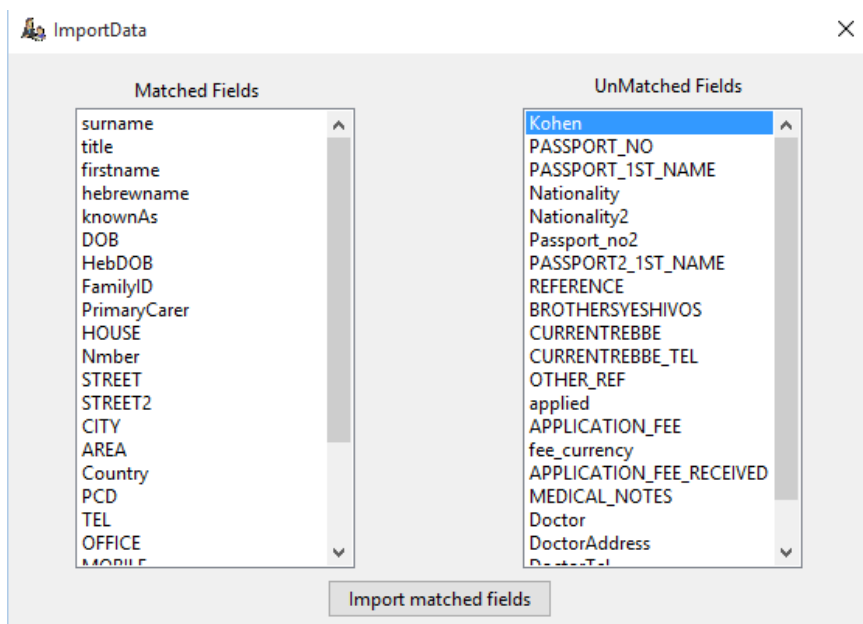
So if for example a family moves house, or changes telephone number, the details only have to be changed in one place.

Also in this way letters can be sent to for example the oldest member of each family, rather than to each student as and when required.

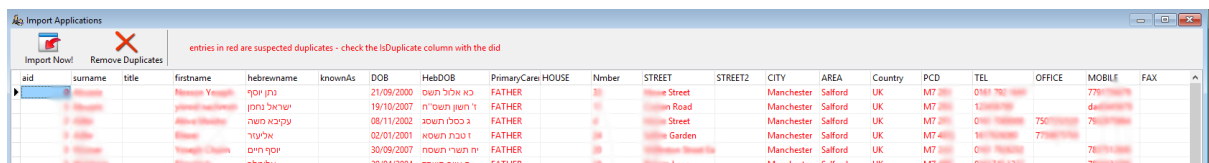


Importing list of students

The program can import lists of students (useful when a **מסד** is already established and wishes to transfer info easily into the system). (However not all information can be entered in this way, some information will have to be edited after importing to ensure all details are present).



The program then checks to ensure there are no doubles in family details.



Current students

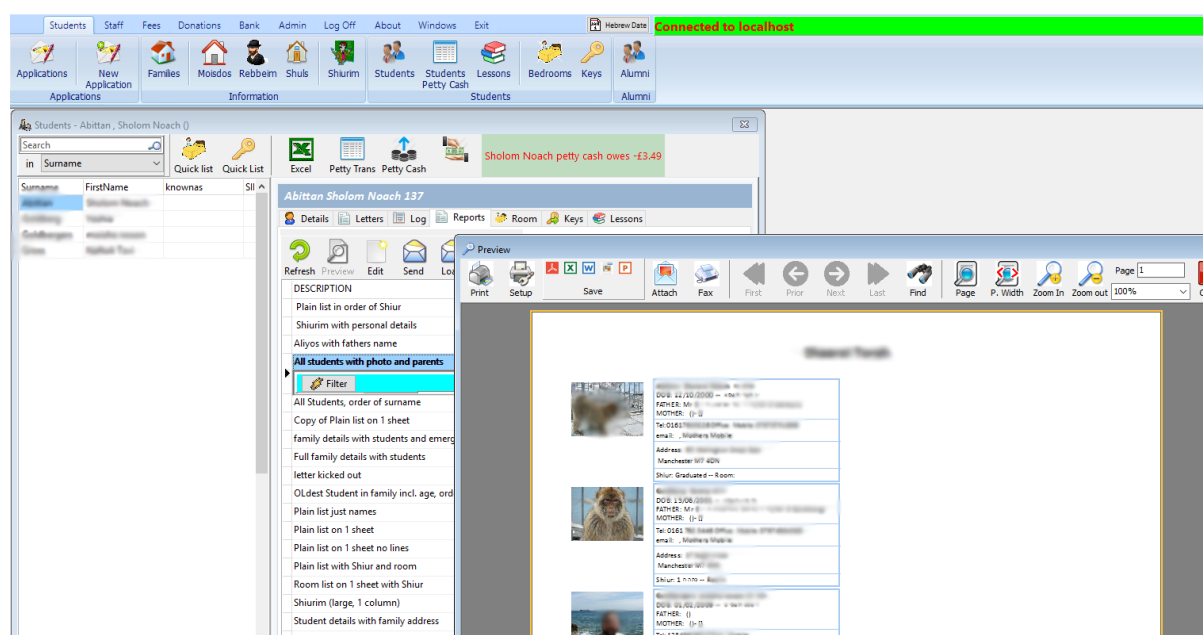
SMS helps manage the student body by ensuring all details are available to the administration.

Dormitories: details – which student is in which dormitory - and room lists are maintained. Room lists can be printed in a number of ways.

“Key” management – SMS keeps track which student has been entrusted with which key, deposit for keys, and other such details can easily be input and maintained. This helps avoid keys becoming “lost”. Reports can be printed of lists of keys.

Reports can also be generated for the benefit of the Magidei Shiur regarding the students in their Shiur. Reports of the entire Student body can also be printed and exported in a number of ways with varying levels of detail. This can be used for organising Chavrusos and other matters not integral in the program.

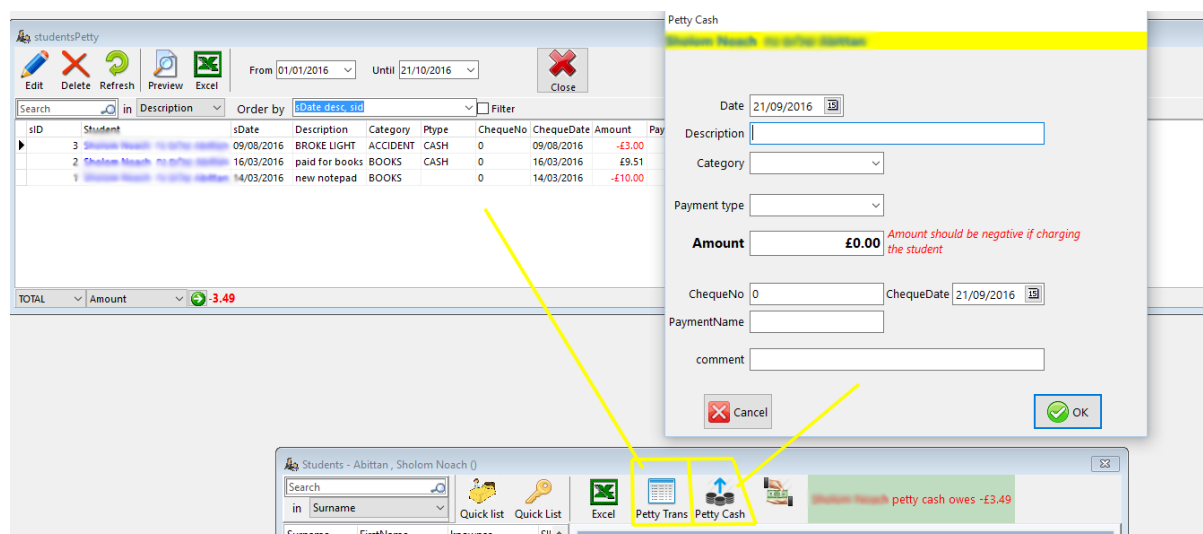
Here is a screenshot showing example of reports that can be generated:



Petty Cash

Sometimes the secretary dealing with students may not have access to finances such as fees, but still needs to have access to petty cash of students.

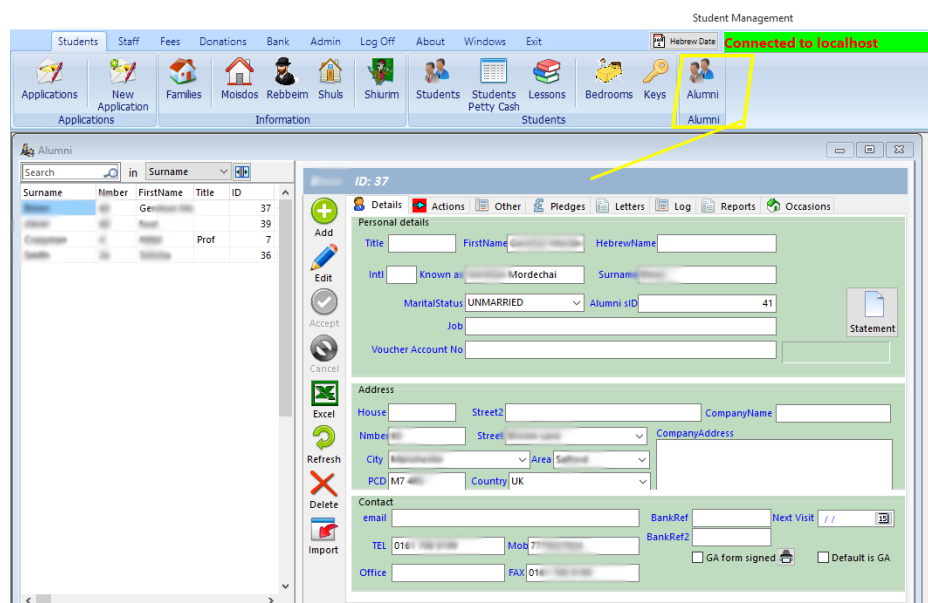
So a simple accounting of petty cash is available independent of the finances of the **תורן**



Alumni

When a student leaves, his details are moved to the Alumni list. Other details e.g. if the student gets married, new address etc can be stored.

Reports can be generated and printed on basis such as unmarried, over a certain age, or other useful criteria.



Personalised Letters can be sent to Alumni using templates in the same way as students, staff and donors.

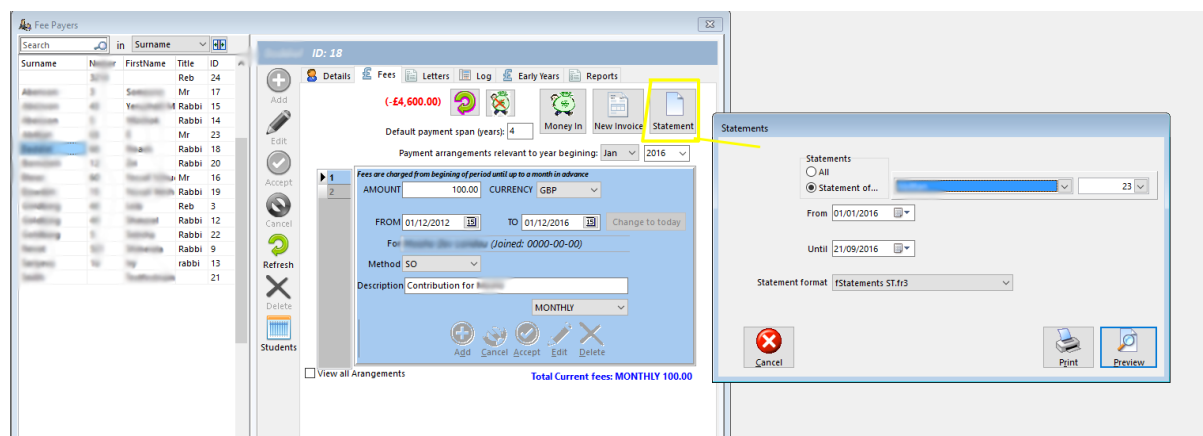
Fees

Each student will have a person responsible for supporting his stay in the τOIM . Sometimes one person will be responsible for more than one student. For example, a parent may have a number of children in the τOIM . The program enables a fee arrangement with the “Fee payer”.

Statements are created automatically and can be printed subject to criteria (e.g. print all, those who owe more than £x etc.).

When an arrangement changes e.g. fees go up, then the program stores all past fee arrangements. Sometimes more than one arrangement can overlap eg for a number of children. Each one is clearly maintained. These arrangements automatically produce the transactions for statements of the account.

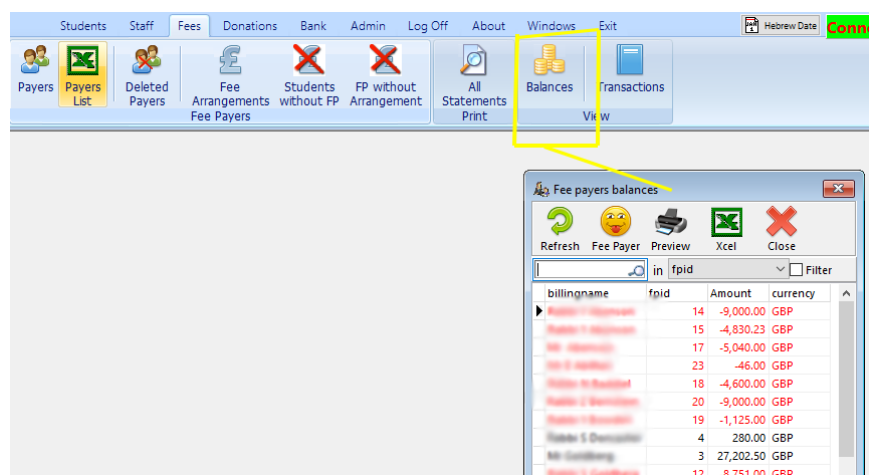
The fee payers can be sent statements of chosen dates as required, using any stored template.



SMS supports GBP, SHEKEL and EUR. This makes it easier to handle foreign Students.

When funds arrive from fee payers they can either be entered one at a time manually. Or, when the program syncs with the online bank, it automatically reconciles.

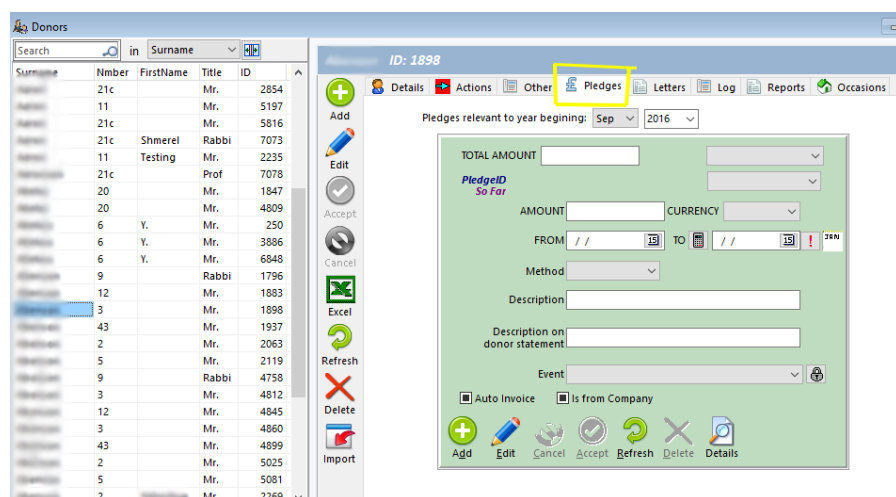
By one click of a button one can see immediately the balances of all the fee payers. This list can easily be exported into excel etc.



Other donations / raising funds

The program can manage collecting events such as dinners, printing invoices, receipts and statements.

It manages pledges.



It can generate collecting lists based on addresses which have been input. It maintains details such as date last approached, previous donation etc, and can be filtered by name of person who collected, area etc.

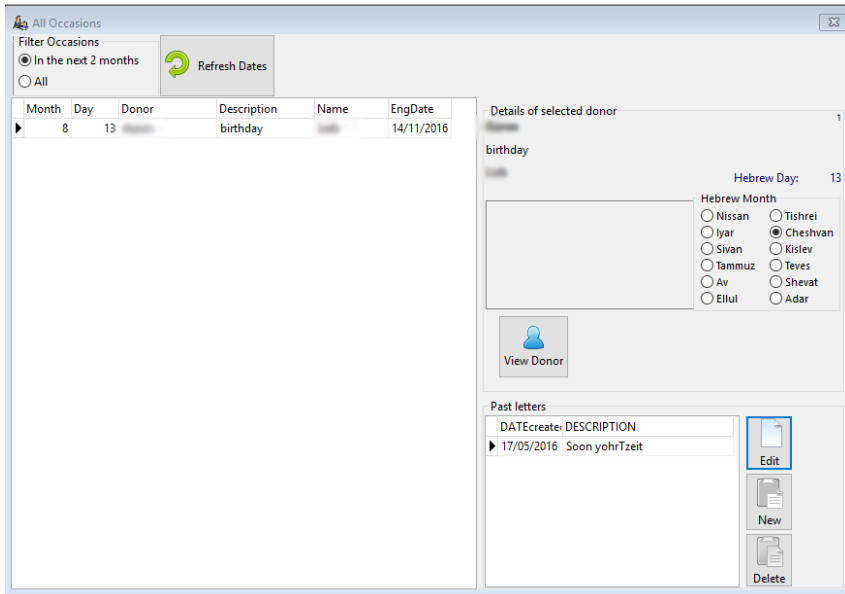
The monies entered into the system can be seen together with monies credited by "Fee payers" giving a comprehensive view of financial state.

Special occasions

The program can remember special occasions such as birthdays, YohrTzeits etc. of donors.

It calculates when the Hebrew date will occur, and it will pop up with the information a couple of months before, so action can be taken.

For example, a letter based on a stored template can be sent immediately or emailed to the donor. A record is kept of the letter, of course.

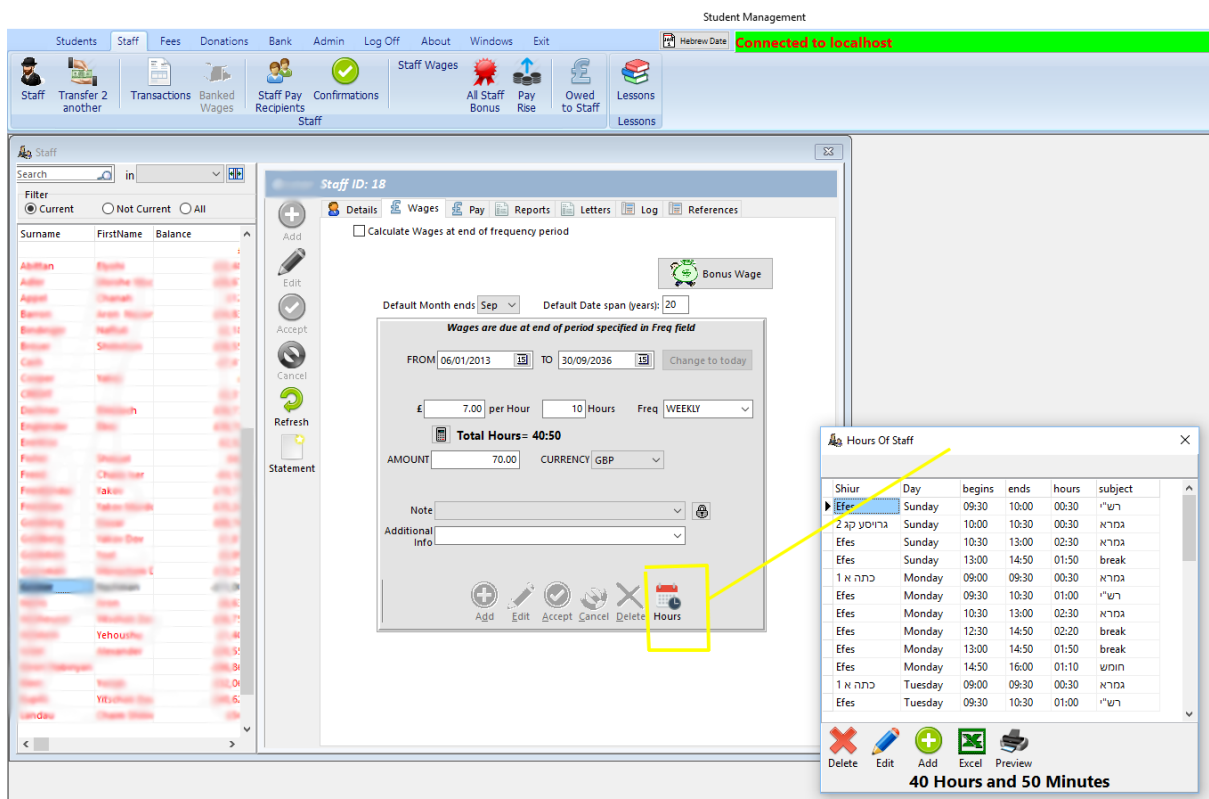


Staff

The program maintains all details of staff and wages. If required the wage can be calculated on a weekly basis based on the hours worked, and the pay being a monthly wage. The system displays how much is owed.

Bonus payments can be added – for example time of Yom tov. When adding a bonus payment, it remembers the previous ones.

It also keeps the schedule of hours worked.



It can also calculate staff wages using a calendar of hours taught, taking into account absences, and working out a monthly wage from this information. If the calendar changes, then the monthly payment amount is automatically recalculated.

Student Management

Students Staff Fees Donations Bank Admin Windows About Log Off Exit Hebrew Date Connected to localhost The current program version is 3.0.0.125

Staff Transactions Set Staff Clock In Banked Wages Staff Pay Recipients Staff Confirmations Staff Wages All Staff Bonus Pay Rise Owed to Staff Owed to staff at Date Lessons Lessons

Staff wage calendar

Staff Member [Name] Total hours 1994 Total Wage £7,007.90

year beginning 2020

Paid Absences rules up to max of 2 days are paid in full for unpaid leave - simply adjust the hours worked or the wage below

Paid-Absent: 2 View Non-paid leave: 1

ACTIONS

Update year Copy from...

SET: Default hours (All dts) am 5 pm 5 Default Wage £/hr am 4.50 pm 2.35 the default hrs for: from: 01/09/2020 until: 30/08/2021 am 5 pm 1

Preview Balance

adate	hebyear	hebmonth	hebday	description	am	wage_am	pm	wage_pm	absent	reason
01/09/2020	תש"פ	אלול	י"ג	Tuesday	5	4.5	4	2.35	<input checked="" type="checkbox"/>	SKYVING
02/09/2020	תש"פ	אלול	י"ד	Wednesday	5	4.5	5	2.35	<input type="checkbox"/>	
03/09/2020	תש"פ	אלול	ט"ו	Thursday	5	4.5	5	2.35	<input type="checkbox"/>	SKYVING
04/09/2020	תש"פ	אלול	ט"ז	Friday	5	4.5	5	2.35	<input type="checkbox"/>	
06/09/2020	תש"פ	אלול	י"ח	Sunday	0	4.5	0	2.35	<input checked="" type="checkbox"/>	SMP
07/09/2020	תש"פ	אלול	י"ט	Monday	5	4.5	5	2.35	<input type="checkbox"/>	
08/09/2020	תש"פ	אלול	כ	Tuesday	5	4.5	5	2.35	<input type="checkbox"/>	
09/09/2020	תש"פ	אלול	כ"א	Wednesday	5	4.5	5	2.35	<input type="checkbox"/>	
10/09/2020	תש"פ	אלול	כ"ב	Thursday	5	4.5	5	2.35	<input type="checkbox"/>	
11/09/2020	תש"פ	אלול	כ"ג	Friday	5	4.5	5	2.35	<input type="checkbox"/>	
13/09/2020	תש"פ	אלול	כ"ה	Sunday	5	4.5	0	2.35	<input type="checkbox"/>	
14/09/2020	תש"פ	אלול	כ"ו	Monday	5	4.5	5	2.35	<input type="checkbox"/>	
15/09/2020	תש"פ	אלול	כ"ז	Tuesday	5	4.5	5	2.35	<input type="checkbox"/>	
16/09/2020	תש"פ	אלול	כ"ח	Wednesday	5	4.5	5	2.35	<input type="checkbox"/>	
17/09/2020	תש"פ	אלול	כ"ט	Thursday	5	4.5	5	2.35	<input type="checkbox"/>	
20/09/2020	תשפ"א	תשרי	א	Sunday	5	4.5	0	2.35	<input type="checkbox"/>	
21/09/2020	תשפ"א	תשרי	ב	Monday	5	4.5	5	2.35	<input type="checkbox"/>	
22/09/2020	תשפ"א	תשרי	ג	Tuesday	5	4.5	5	2.35	<input type="checkbox"/>	
23/09/2020	תשפ"א	תשרי	ד	Wednesday	5	4.5	5	2.35	<input type="checkbox"/>	
24/09/2020	תשפ"א	תשרי	ה	Thursday	5	4.5	5	2.35	<input type="checkbox"/>	
14/10/2020	תשפ"א	תשרי	ו	Wednesday	5	4.5	5	2.35	<input type="checkbox"/>	
15/10/2020	תשפ"א	תשרי	ז	Thursday	5	4.5	5	2.35	<input type="checkbox"/>	
16/10/2020	תשפ"א	תשרי	ח	Friday	5	4.5	5	2.35	<input type="checkbox"/>	

Student Management

BALANCE SO FAR: 2268.19
 AVERAGE MONTHLY WAGE: £583.99
 NEXT PAY DUE: 9 May 2021
 PAY MONTHS REMAINING: 5
 AMOUNT OWING AT END OF THIS YEAR: £4,739.71
 MONTHLY PAY SHOULD NOW BE: £947.94

OK

Child care

The flexibility of the program is very useful in that extras can easily be added. For example, when Child care was introduced, it was just a question of adding some reports to the system. These are flexible, according to individual requirements.

Ongoing expenses

The program maintains details of suppliers and auto calculates ongoing monies paid.

Regular payments to suppliers can be set up so the program auto enters them, saving time.

Student Mar

Students Staff Fees Donations Bank Admin Log Off About Windows Exit Hebrew Date

Bank transactions Payments Suppliers Bank

Suppliers

BusinessName

Name

Add

Accept

Cancel

Delete

Refresh

Excel

Details Regular Invoices Log Reports

Basic details

Name

ID: 1

Title Mr FirstName Surname

Suppliers Address

House Nmb: 44 Street Grove

Street2 City

Area PCI Country UK

Contact Info

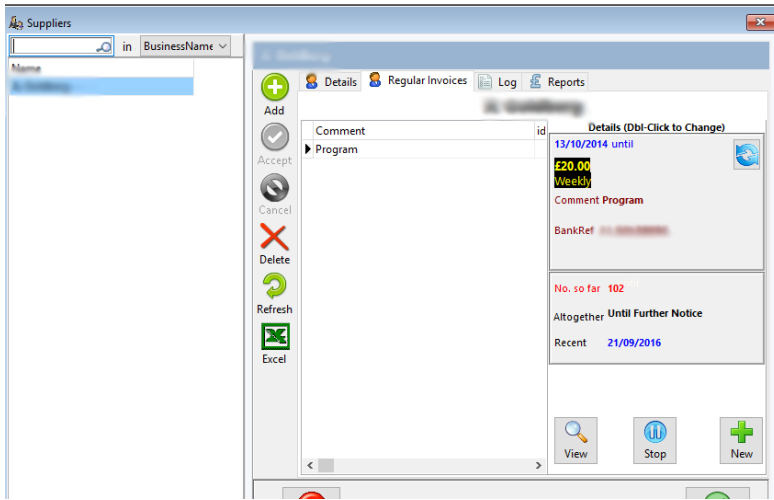
email

TEL 999 Mob

Office FAX

NOTES

Close Save

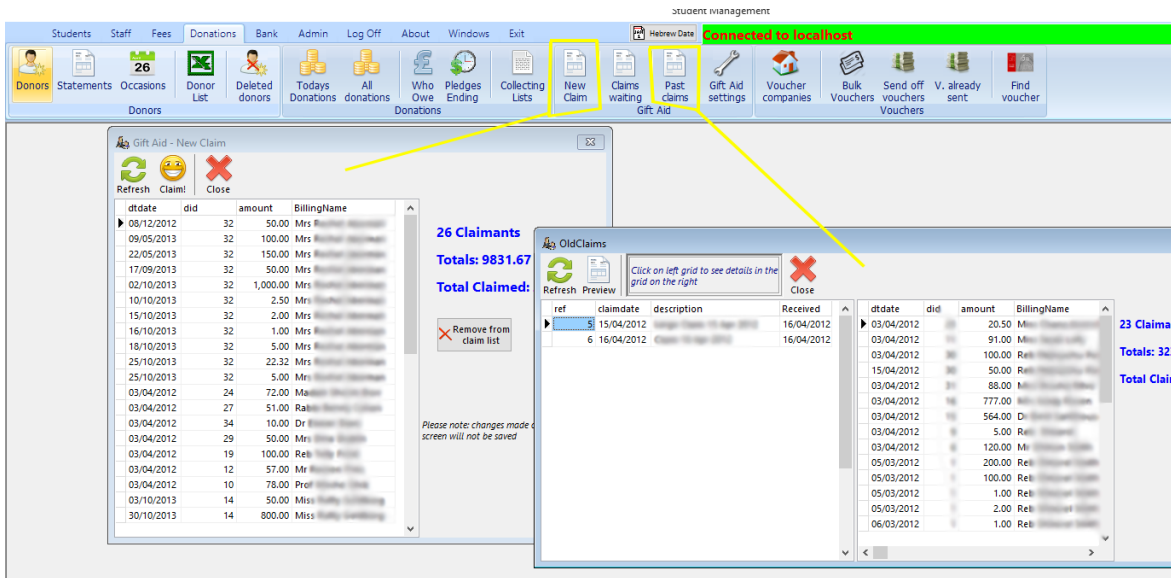


Other expenses can also be entered into the system.

Transactions from online banks can be downloaded and synchronised with the program.

Gift Aid

The program interacts with online HMRC gift aid claims, producing the sheets required by HMRC from the information in the donations. The user can log in online to HMRC directly from the program.



The screenshot shows a software application window titled "GA claims as from April 20". The window contains a table with the following data:

title	FirstName	LastName	House	PCD	Aggregated	Date	Amount
Donations up to £20.00						03/04/20	£11.98
Donations up to £20.00						25/10/20	£15.50
Mrs [Name]			29a			08/12/20	£50.00
Mrs [Name]			29a			25/10/20	£1,322.32
Mac [Name]						03/04/20	£72.00
Rabbi [Name]						03/04/20	£51.00
Mrs [Name]						03/04/20	£50.00
Reb [Name]						03/04/20	£100.00
Mr [Name]						03/04/20	£57.00
Prof [Name]						03/04/20	£78.00
Miss [Name]						30/10/20	£850.00
Mrs [Name]						03/04/20	£50.00
Mrs [Name]						08/12/20	£25.00
Prof [Name]						03/04/20	£6,543.87
Mr [Name]						03/04/20	£500.00
Dr [Name]						03/04/20	£55.00

Summary statistics: TOTAL AMOUNT: £9,831.67, NO. of entries: 16.

Overlaid on the right is a "GOV.UK Sign in" form with fields for "User ID" and "Password", and a "Sign in" button. The text above the form reads: "GOV.UK uses cookies to make the site... HM Revenue & Customs. Enter your Government Gateway credentials when you created your HMRC online account."

Vouchers

When a voucher is given to the donor, the program will keep track of the bundle sent to which charity on which date, and whether monies were received or partially held by the charity voucher company.

It displays at a glance per voucher company monies waiting and total value of vouchers waiting to be sent off.

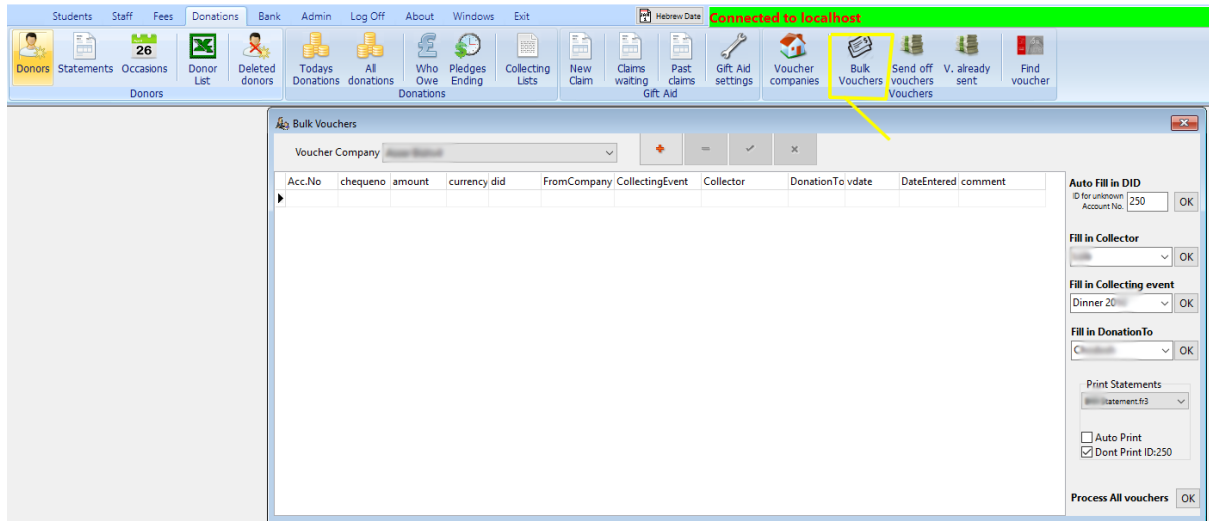
Lists of vouchers can be printed / exported and a search can be made for particular voucher.

The screenshot shows a window titled "Charity Companies" with a list of charities. A "Send Vouchers" dialog box is open, showing a table of voucher data:

vdate	amount	currency	chequeno	did	currency	Totals
11/09/2014	3.00	GBP	95445663	2235	GBP	4.50
22/02/2016	1.50	GBP	146561	5197		

The dialog box also includes a "Choose a Voucher Company" dropdown menu, a "Notes on List" section, and buttons for "Print voucher list" and "Mark all as Sent".

The program can identify donors using the id on the vouchers, it learns as it goes along. In this way bulk processing of vouchers is easy and speedy.



Updates and backups

I am continually improving the program. I add features and fix any bugs discovered.

Updates are automatically downloaded and installed as when required.

The program automatically backs up locally when closing every day, keeping 10 backups

It is possible to install two separate systems which interact together.

If you would like a demonstration, please contact JL Goldberg 0161 792 2958/0794 352 2961