



ScholarOs

ONE SCHOOL. ONE OPERATING SYSTEM.

CLIENT MEETING EDITION · SEPTEMBER 2026

A clearer way to run the whole school.

A practical guide to the ScholarOs platform—from admissions and academics to finance, parent communication, reporting, and daily operations.

Audience

School owners, boards & leaders

Format

Executive and operational guide

Deployment

Cloud or ownership options

THE OPERATING PICTURE

From scattered records to one trusted workspace

ScholarOs brings people, processes, and evidence together. Each school receives a private tenant workspace, and every user sees the tools appropriate to their role and subscription.

1

shared source of truth
for school operations

7

purpose-built user roles
with governed access

30+

operational screens and
connected workflows

Web

responsive browser
access wherever
approved connectivity is
available

01

See what matters now

Leadership dashboards summarize enrollment, staff, attendance, fee position, academic activity, upcoming events, and actions requiring attention.

02

Standardize daily work

Admissions, attendance, grading, invoicing, communication, discipline, and inventory follow consistent workflows rather than isolated spreadsheets.

03

Serve every stakeholder

Principals, deputies, teachers, staff, parents, and students receive role-specific navigation and only the data necessary for their work.

04

Build accountable records

Operational records remain searchable and reportable, helping the school explain decisions, reconcile money, and track progress over time.

The result is not simply “school software.” It is a consistent operating method that makes the institution easier to understand, manage, and improve.

CONNECTED CAPABILITY

One platform, organized around the school

Modules share the same tenant, users, students, academic context, and permissions. Feature access varies by plan, but the operating model stays consistent.

Student lifecycle

Admissions pipeline, student profiles, parent links, class placement, status management, and searchable records.

Admissions

Students

Parents

Academics

Subjects, classes, lesson schedule views, assignments, quizzes, examinations, grades, approvals, results, and printable report cards.

CBC / KCSE

Results

Attendance & time

Daily attendance, absence and lateness records, timetables, school calendar, duties, and event coordination.

Attendance

Timetable

Finance

Fee records, balances, collection views, statements, receipts, payment references, and finance documents.

Fees

Receipts

Community

Announcements, messages, in-app notifications, configured email broadcasts, parent/student portals, and approved testimonials.

Email / in-app

Portals

Operations & governance

Staff, teachers, discipline, inventory, duty roster, settings, API keys, Google SSO, audit evidence, analytics, and reports.

Controls

Evidence

A tenant is a private school workspace

Every school is identified by a school code at sign-in. School records are scoped to that tenant, while the separate platform-administrator workspace oversees tenants, plans, account counts, operational indicators, leads, and service health. It does not currently provide a consolidated network-school workspace.

ROLE-BASED EXPERIENCE

Each person starts with their own job to do

Navigation and actions adapt to the signed-in role. The same record can move through several people without exposing unrelated administration.

Principal / Deputy

- Review dashboard alerts and operating indicators.
- Oversee admissions, staff, academics, finance, and discipline.
- Approve results and generate management reports.
- Manage settings, communication, and school-wide controls.

Teacher

- See assigned classes, subjects, lessons, and timetable.
- Record attendance and enter grades.
- Create assignments and quizzes.
- Review learner performance and communicate appropriately.

Administrative / Finance staff

- Maintain operational records within assigned access.
- Manage fees, collections, statements, and receipts.
- Coordinate inventory, duty rosters, and communication.
- Prepare records for leadership review.

Parent / Student

- Access linked or personal academic information.
- See results, assignments, events, and communication.
- Parents monitor balances and school updates.
- Students focus on learning tasks and progress.

Example: one academic result, governed from entry to publication

1 • Setup

Classes, subjects and teacher assignments



2 • Capture

Teacher enters assessment scores



3 • Review

Leadership checks completeness



4 • Approve

Authorized approver confirms result



5 • Publish

Reports become available to audiences

Control principle: visibility is based on role, tenant, linked student relationships, and subscribed features—not on a single shared account.

TEACHING AND LEARNING

Academic work becomes visible, repeatable, and reportable

The academic stack connects curriculum structures, teaching activity, assessment records, approvals, and learner-facing outputs.

Foundation	Configure academic year, term, classes, streams, subjects, grading system, teachers, and assignments.
Planning	Create timetables, lesson schedule slots, quizzes/assessments, examinations, and school calendar activities.
Delivery	Teachers work from their allocated context and record attendance and learning evidence.
Assessment	Capture marks, remarks, quiz results, and exam outcomes using consistent learner records.
Assurance	Authorized leadership reviews and approves results before formal reporting.
Reporting	Generate report cards, class views, learner results, and higher-level analytics.

What leadership can ask

- Which learners or classes need support?
- Are all subjects and scores complete?
- What has been approved and what is pending?
- How does attendance relate to performance?
- Are teaching duties and learning activities scheduled?
- Can a parent receive a clear, consistent record?

For teachers

Less time rebuilding lists and reports; a focused workspace for assigned academic work.

For leaders

Greater completeness, earlier visibility of gaps, and controlled approval before publication.

For families

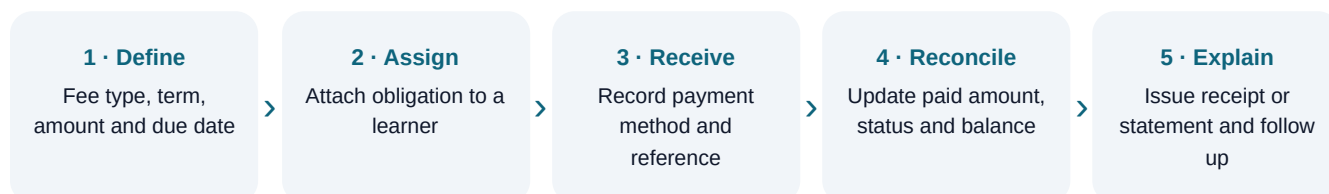
A clearer view of progress, responsibilities, dates, and school communication.

ScholarOs does not replace professional academic judgment. It gives that judgment reliable data, a clear workflow, and a consistent record.

TRUST THROUGH CLARITY

Connect the fee position to the people who act on it

Finance records, documents, and communication sit alongside the same student and parent relationships used by the rest of the school.



Finance views

- ✓ Outstanding, partial, and paid fee records
- ✓ Collections and payment-method context
- ✓ Student-linked statements and balances
- ✓ Printable receipts and finance documents
- ✓ Management reporting and dashboard visibility

Communication views

- ✓ Announcements and inquiry records
- ✓ In-app and configured SMTP email broadcasts
- ✓ Parent and class audience targeting
- ✓ Delivery, partial-delivery, and failure outcomes
- ✓ Student access from Standard; parent access from Premium

Paid

settled obligations with recorded amount and reference

Partial

amount received with a visible outstanding balance

Pending

unsettled obligation that can drive follow-up

Important operating practice

Access to finance should follow the school's separation-of-duties policy. Paystack, M-Pesa, and email delivery require the relevant provider configuration and may carry third-party usage charges. Direct M-Pesa, Google sign-in, and SMS are not currently configured on the hosted service. Confirm activation separately; email and hosted Paystack checkout are configured.

CONTROLLED ACCESS

The right workspace for the right responsibility

Accounts are individual, auditable, and governed by role. Tenant-level work is separated from platform-wide administration.

Role	Primary scope	Typical responsibilities	Guardrail
Super Admin	Platform	Tenants, plans, indicative plan value, users, leads, testimonials, health and activity views	Must explicitly select a tenant before entering school routes
Principal	School-wide	Leadership, settings, staff, finance, academics, approvals, reporting	Bound to one school tenant
Deputy	Delegated leadership	Academic and operational oversight, attendance, discipline, schedules	Capabilities follow configured role rules
Teacher	Assigned learning work	Attendance, lessons, assignments, quizzes, grades, learner views	No platform or unrelated tenant administration
Staff	Assigned operations	Administration, finance, inventory, duties, communication as permitted	Role-specific navigation and actions
Parent	Linked learner(s)	Progress, fees, results, calendar, school communication	Relationship-scoped information
Student	Personal learning	Results, assignments, quizzes, timetable, events	Own academic context

Data boundary

Tenant-aware requests carry the authenticated school identity. School records are queried and written within that context.

Feature boundary

Plan entitlements determine whether premium modules—such as portals, advanced analytics, SSO, or API access—are available.

Approval boundary

Sensitive steps such as academic approval remain explicit rather than being inferred from data entry alone.

Account boundary

Named accounts make responsibilities clearer. Password sharing should not be part of the school's operating procedure.

FROM DECISION TO DAILY USE

A phased implementation keeps adoption practical

The exact calendar depends on data quality, integrations, scope, and stakeholder availability. The sequence below provides a disciplined starting point.

1 • Discover	Confirm school structure, enrollment, terms, roles, fee model, academic structure, reports, integration needs, and success criteria.
2 • Prepare	Collect and clean approved student, parent, staff, class, subject, balance, and opening configuration data.
3 • Configure	Create the tenant, select the plan, apply school settings, import agreed data, and configure communications or integrations.
4 • Validate	School champions check samples, permissions, totals, reports, login flows, and critical operational journeys.
5 • Train	Run focused sessions for leaders, teachers, staff, and portal users using realistic school scenarios.
6 • Launch	Activate users in waves, publish support channels, monitor adoption, and resolve launch issues.
7 • Improve	Review data completeness, workflow usage, user feedback, and leadership reporting on an agreed cadence.

What the school provides

- Executive sponsor and process owners
- Approved, lawful, and clean source data
- Decisions on roles and access
- Timely validation and staff attendance
- Provider accounts for optional integrations

Initial setup package • Basic to Plus

- Guided school and academic configuration
- Initial student import using ScholarOs CSV templates
- Remote principal and nominated staff training
- Import scope, attendees and dates agreed before payment
- Annual billing includes the package with no setup fee

DECISION CHECKLIST

What we should agree before implementation

A strong launch begins with shared expectations. Use this page as the closing checklist for the meeting.

Institution profile

- ✓ Number of students and operating locations
- ✓ Whether each location needs its own tenant
- ✓ School type and academic structure
- ✓ Target launch date and key deadlines

People and governance

- ✓ Executive sponsor and implementation lead
- ✓ Role owners for academics, finance, and operations
- ✓ User count and access approval process
- ✓ Whether an internal technical team will participate

Data and workflow

- ✓ Available source files and their quality
- ✓ Opening balances and historical-data requirement
- ✓ Approval and reporting expectations
- ✓ Required document formats and branding

Commercial and technical

- ✓ Subscription, one-time, or source-code route
- ✓ Cloud, self-hosted, or ownership responsibility
- ✓ Email, payment, Google SSO, and API needs
- ✓ Support, monitoring, backup, and training terms to put in writing

Recommended next step

Run a structured discovery session, select the commercial route, confirm the modules needed for launch, and nominate a school implementation owner. ScholarOs can then produce a written scope, delivery schedule, and final quotation.

This guide describes the current ScholarOs product model. Final scope, integrations, migration effort, service levels, timelines, third-party costs, and commercial terms are confirmed in a signed proposal or agreement.