

Office first-week checklist

Set up a new school in this order, so each step has what it needs from the one before. Full guide: <https://www.shuleos.co.tz/docs/admin/first-week-checklist>

DONE	#	STEP	WHAT TO DO	WHERE	DATE, WHO
☐	1	School settings	Name, logo, address, phone, principal's name and signature, theme colour, report card layout.	Account > Settings	
☐	2	Academic year and terms	Create the year and its terms, and make the year current.	Academic Years	
☐	3	Classes and sections	Create every class and its streams. Import them from a file if there are many.	Classrooms	
☐	4	Subjects	Create the subjects and choose the classes that take each one.	Subjects	
☐	5	Grading scheme	Check the default grading scheme and the pass mark, or make your own.	Grading Schemes	
☐	6	Students and parents	Add students, place them in classes, link their parents. Import from a file for a whole school.	Students, Parents	
☐	7	Parent logins	Create the parents' logins and print or send their details.	Parents	
☐	8	Staff and teachers	Add employees and teachers, and create teacher logins.	HR > Employees, Teachers	
☐	9	Class and subject teachers	Say who is class teacher and who teaches what.	Class Assignments, Subject Assignments	
☐	10	Periods and timetable	Set up the school day, then build or generate the timetable.	Periods, Timetable	
☐	11	Roles and users	Give each office worker their own login and the right role.	Account > Users, Roles	
☐	12	Fees (if you have them)	Fee types, installments, fee amounts, then generate the first invoices.	Fee Setup, Fees	
☐	13	Messaging (if you have it)	Set up SMS and email, choose the automatic notifications.	Account > Messaging	
☐	14	Try it on one class	Take attendance once, enter a few marks, and check what a parent sees.		

TIPS FOR A SMOOTH START

- Do the steps in order: you cannot place a student in a class that does not exist yet.
- Anything with more than a handful of rows has an **Import** button, with a blank template and a sample. You always see a preview before anything is saved. Templates: <https://www.shuleos.co.tz/docs/downloads>
- Give each person their own login, never a shared one: the Audit Log then shows who did what.
- Try everything on one class first, then do the whole school.