tutorDIARY

Version 2.0
User Guide

18 February 2013

Catering to the Business Needs of Driving Schools

Table of Contents

Introduction

With more and more people willing to hit the roads and take control of that steering wheel, the demand for driving lessons continues to grow. For driving schools, this situation couldn't be more positive as business is soaring high. Driving schools now need to be more organised in their approach of manoeuvring their business.

Gone are the days when driving schools had to manage student bookings and invoice slips using pen and paper. This technological era has paved the way for businesses to function at entirely innovative and elevated levels. Dedoc Software with its range of IT software caters to this very need of driving schools by allowing you to keep total control of your business and connecting key people in real-time.

Tutor Diary is Dedoc Software's latest product catering to the business needs of driving schools and driving instructors. It is unique online driving school management software that lets you organise your driving school efficiently and conveniently. From storing pupil profiles and instructor details to making bookings via a dynamic instructor week-by-week calendar, from generating invoices to sending SMS and emails to pupils, tutorDIARY is a secure online interface that puts your business in a 'go-drive' mode.

tutorDIARY is a booking management system that helps driving schools track finances, students and other relevant information. It is not merely a simple diary to record lesson timings of pupils enrolled in the school; its exciting features do a lot more! tutorDIARY is an online product that can be accessed directly by a browser such as Chrome, Firefox, Safari or Internet Explorer.

This user guide introduces you to the basics of tutorDIARY and how to go about managing your driving school business. It gives you expert direction on how to use the exciting features in a collaborative environment.

With this user guide at your disposal, you can better enjoy your experience with tutorDIARY. Read through and learn how you can maximise the benefits of the software.

Chapter 1

Tutor Diary at a Glance

What is Tutor Diary?

tutorDIARY is a tool for driving schools to manage their business in real time. This is an online product that offers compatibility with browsers such as Chrome, Firefox, Safari or Internet Explorer.

tutorDIARY is the latest product from Dedoc Software, which offers greater security. In case of a disk crash or stolen computer, the data can be directly fetched from servers. The diary would be available again without any installation or recovery procedures.

Enhanced Optimisation

The system will automatically recognise the type of device you are using and adjust behaviour accordingly. If you are using an iPad, then the system will switch on the touch functions. Otherwise, it will use normal mouse procedures.

Credit Card Support

Instructors can take credit cards directly online in their car with an iPad or Android, using a 3rd party company.

Expanded Invoice System

Invoice system is not restricted to lessons any more as in ADI-diary. It can include any other product or service such as charge back for driving test fees or Hazard Perception DVD.

Improved Memos

Pupils and Instructors Memos can be inserted as you go along and then viewed according to date. Memos are also searchable for single word or phrase.

Greater Degree of Control

You can create your own courses, enter the duration of the lesson and set the price. These will be automatically assigned to every new lesson for a given pupil. You can view your schedule and comprehensive Pupil's Progress Report by month, week or day.

Tracking Prepaid and Unpaid Lessons

Records of those pupils that have not paid for their driving lessons in advance can be easily tracked. It facilitates easy distinction between those pupils who have paid and those who have yet to pay, so that you do not miss out on collecting payments.

Email or SMS Reminder to the Pupil

tutorDIARY has an improved emailing system and includes a new SMS feature that permits you to send a short message to your pupil's mobile phone as a lesson reminder.

Easy Software Upgrades

tutorDIARY provides free software upgrades unlike ADI-Diary which charges for any new upgrades. Moreover, constant improvements are being made to the software based on changing needs and requests from existing customers.

Chapter 2

Getting Started

Add New Pupil

To add a new pupil to your diary, click 'New' and then select 'Pupil'. A new window, 'Create New Pupil Account' opens, where you can add the new student profile by entering his/her name, email and phone numbers. Hit 'Create Account' once you are done. The dialog box will then disappear and Pupil Profile will open where you can add more information.

Please note: if you are logged as an instructor then all pupils which you insert into your diary are allocated to you automatically. If you have logged in as a director, the pupils will not be allocated to you, then when you log in as an instructor the pupil will disappear from your list. Therefore, ensure that if you have logged in as a director, allocate the pupil to yourself in the pupils profile, settings tab.

View Pupil Profile

In order to view a pupil's profile, click on the student's name in the top right corner of the page. A 'Pupil Profile' window opens where you can view and edit pupil's contact details, and other information such as license, driving test, availability, and course details. Click 'Submit' if you have made any changes.

To upload an image of the pupil, click Upload under the "No image" avatar.

> **Please note:** The system will accept an image in jpg, jpeg, png and gif format up to 2 megabytes. Large pictures will be automatically resized to 500px across.

Search Pupil

You can search for a pupil through two different methods: Quick Search and Advanced Search.

Quick Search

By clicking on the pupil label (with the tiny magnifying glass) on the top right of the screen, you can quickly search for pupils in the list. A box slides open that reveals two filters that you can apply before you search for the pupil.

Status Filter

The Status Filter lies to the left of the box and indicates the status of student: Active, Inactive, Passed, Failed, Completed, Dropped Out, and Enquiry Only.

Allocated Filter

The Allocated Filter lies to the right and indicates the instructor allocation status. It has only two entries: *Allocated pupils only*, which means that an instructor has been set, and *Waiting List*, which means that you need to open pupil's profile and set an "Allocated instructor" in Setting Tab.

The two filters work in conjunction with each other. That means if you select "Active" and "Waiting List" you might get zero results. To reset the filters select [Ignore].

How the quick search box performs the search
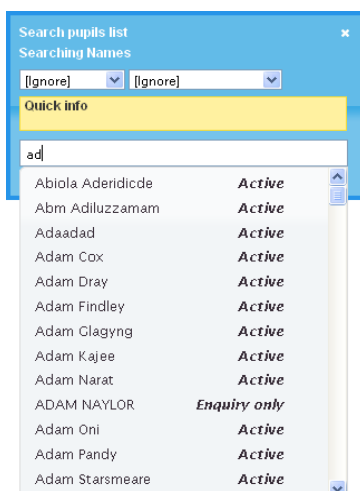
1. The search is incremental and not case sensitive

2. It requires at least 2 characters

3. If first two character are letters then the system searches in First and Last names. By entering a space after the first name you can restrict the search to last names only.

4. If second or third characters are numbers then the system searches for postcodes.

5. If the first character is a number then the system searches for phone numbers which are stored in Phone 1 field. Any spaces will be ignored.

As a reminder the message at the top of the box will tell you in which field you are searching. The result is always produced as a list of pupils.

Once you have selected a pupil from the list, the name will appear in the top right corner, which means that all following bookings will be automatically booked for this pupil.

Advanced Search

Click on 'Pupils List' *(the link in the middle of the toolbar)* and a new window titled 'Pupils List' opens up. Here you can search for students by entering the First Name, Last Name, and other criteria.

Once you enter this information, click 'Search', you can view the results on the same page. Clicking on a result line will select the pupil into the top right corner of the diary.

In order to search all pupils for the instructor you currently have selected, click "Active pupils of selected instructor" button.

To find pupils for a different instructor, enter the instructor name or instructor ID and click Search.

"Waiting List" button will output the list of pupils who currently have no instructor allocated.

View Memo Log

To view a student's Memo Log, open pupil's profile by clicking on the pupils name in the toolbar. Alternatively click Control Panel then Memo.

In the Pupil Profile, click 'Memo Log' button at the base of the profile window. A form opens up where you can create a new memo or search memos according to the date. You can also search for a single word, contained anywhere in the memo.

View Student Progress Report

Before you can view a report, you need to enter some comments about the pupil's progress.

To enter lesson comments:

1. Click on a particular lesson in the diary and a Booking Form opens.

2. Click on the plus sign next to the pupil's name

3. Click on 'Subjects'. A 'Lesson Subjects' window opens where you can enter the lesson comments

█ **Please note** that these comments will be visible in the progress report.

To view the progress report of a particular student

1. Make sure the student's name is displayed at the top right corner of the screen.

2. Click on the Control Panel and wait for a small window to pop up.

3. In the Control Panel window, click 'Progress Report' under Pupil Header.
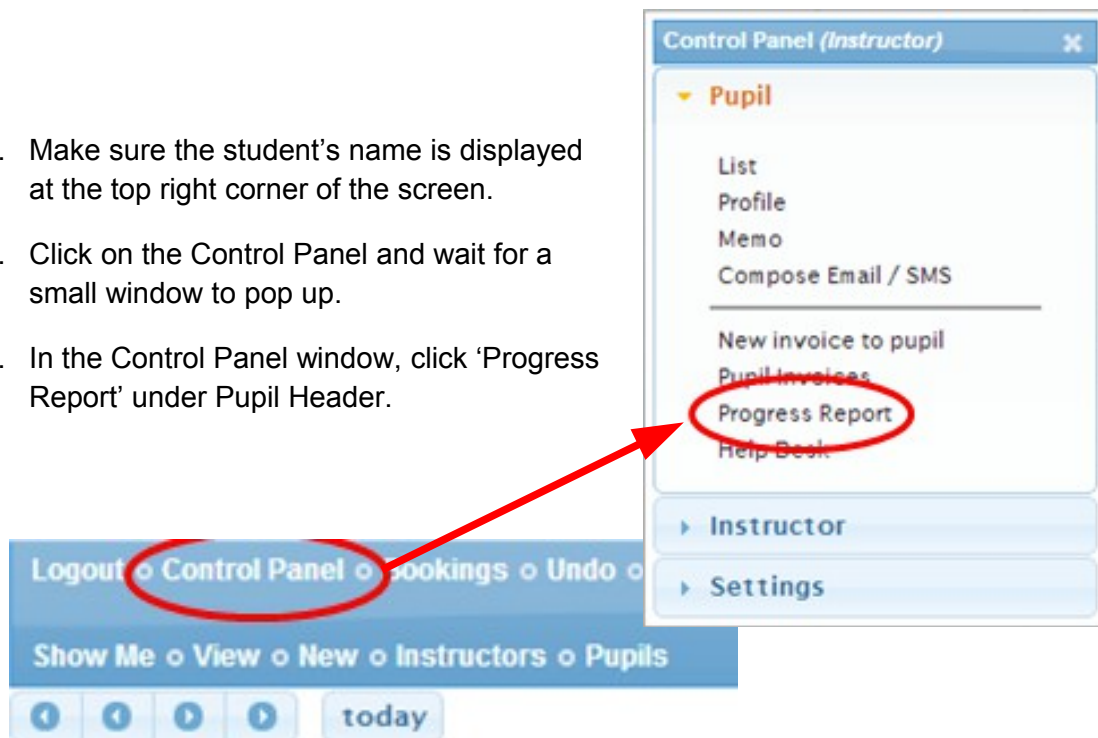
The Student Progress Report allows you to see the courses taken along with the date and time of the lesson. You can even view paid and unpaid lessons separately by selecting the Lessons Report label at top centre of the screen. You can also view invoice reports to pupil and the driving school by clicking 'Invoices'.

Progress Report

Pupil Name: **Jason Johns**
Driving School: **Tech support**
Date: **Tuesday, February 2013, 12:50:25 AM**   Lessons • Invoices   Items per page: 20 ▼

Date	Time	Test time	Duration	Course	Lesson kind	Subjects	Comments
Oct 25, 2011	02:00 PM		01:00	Partly Trained	Introductory Lesson		
Feb 19, 2013	08:45 AM		01:00	Manual - Novice	Lesson	Approaching junctions to turn left - mark: 5	Demonstration of progress report comments

Create Bookings

To make a booking for a lesson or a driving test, click on 'Bookings' on the top right of the screen and a Bookings window pops up.

Book a Lesson

Select a lesson in the lesson panel and then drag it onto any time slot in the diary. The duration of the lesson can be selected from the dropdown box. If "Default" is selected, then the duration is taken from "Courses and Rates" Page. The fee will be recalculated according to the duration and the subject is fetched from pupil's profile.

One click booking

To simplify the booking process, you can select "One click booking" radio button. Once it is selected, the lesson will be inserted into the diary at the time slot where you clicked.

Please note: No lessons are saved unless you have clicked "Save" in the toolbar.
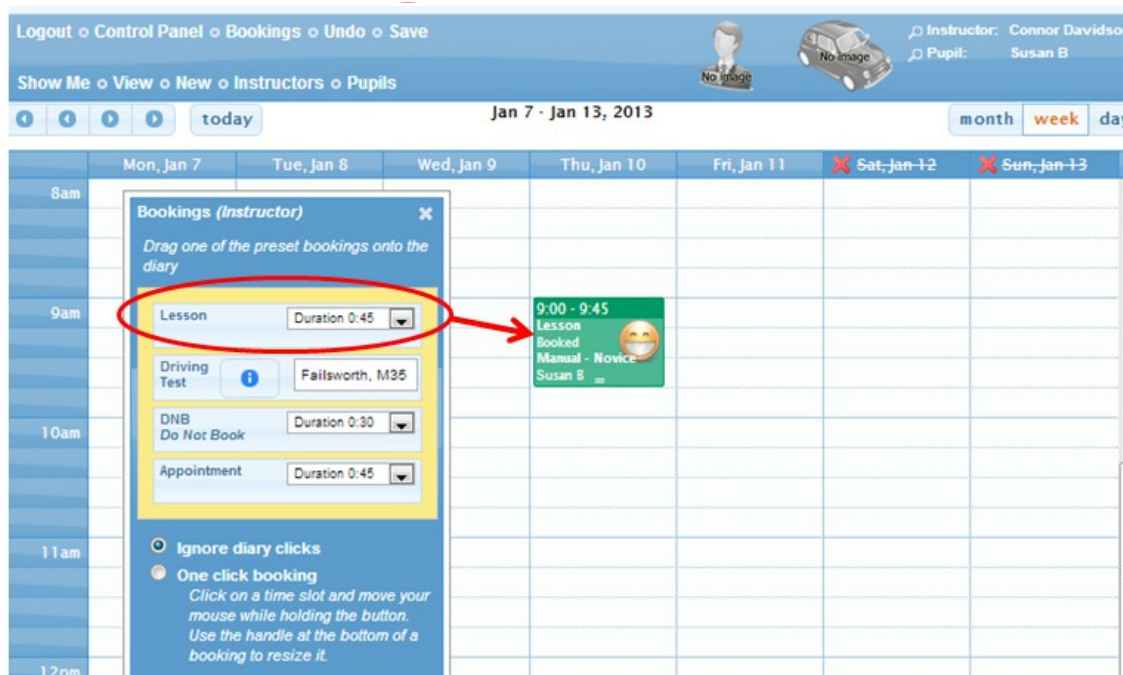
Move and Resize the Booking

You can move the lesson to a different time slot just by dragging and dropping it to the desired location.

You can change duration by resizing the lesson.

1. Make sure the lesson has the correct start time

2. Place your mouse at the bottom of the booking

3. When the double arrow cursor appears, hold your button and drag it up or down.

To change time and duration with more accuracy, you would need to click on the lesson and change values accordingly.

See Edit Bookings

Book a Driving Test

In the postcode box, enter a character and a list of UK test centres appears.

Select the test centre of choice and drag the test panel onto the desired time slot in the diary.
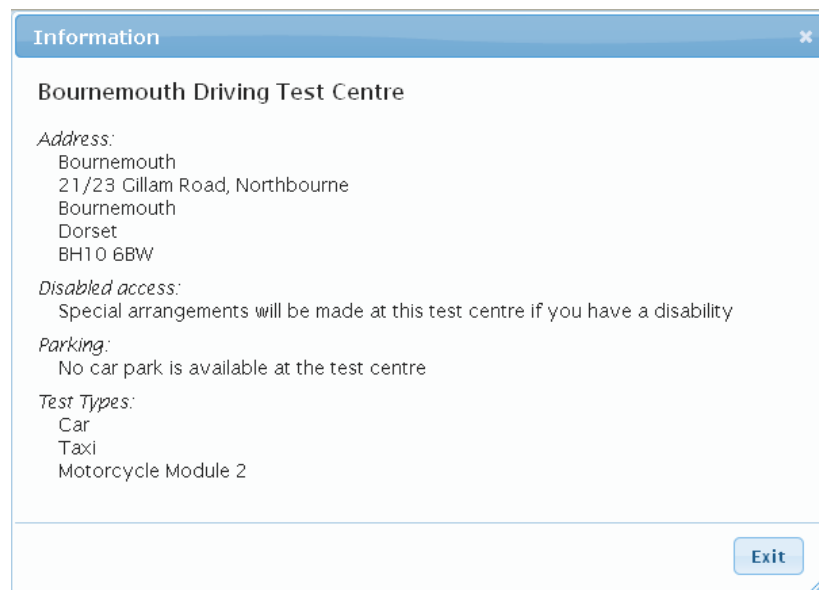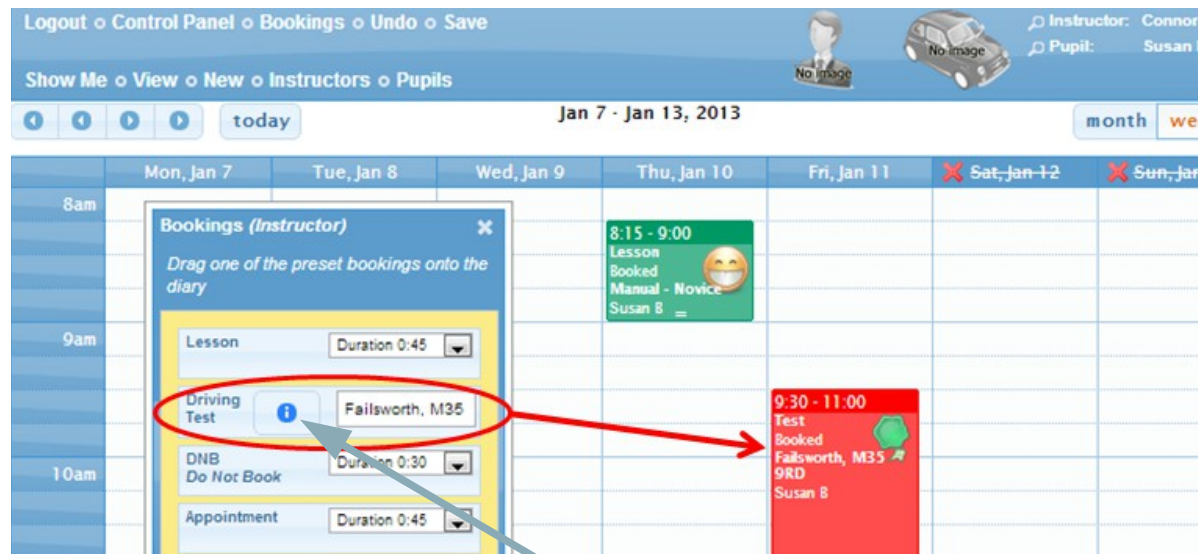

You can view information about the test centre by clicking on the information icon.

Infobox

To view the quick information associated with a lesson without opening the Bookings Form, right click on the lesson. The info box will reveal itself and move around the screen along with the mouse. When the mouse hovers over the lesson, the appropriate information with the pupil's image appears.

To lock the information box in one single place, right click again and then you can move the info box into the desired location on the screen. The information will still be available if you move your mouse over a lesson.

To get rid of the info box, click cross icon in top right corner, the box will not appear until you click with right button again. Similar commands are available under view menu.
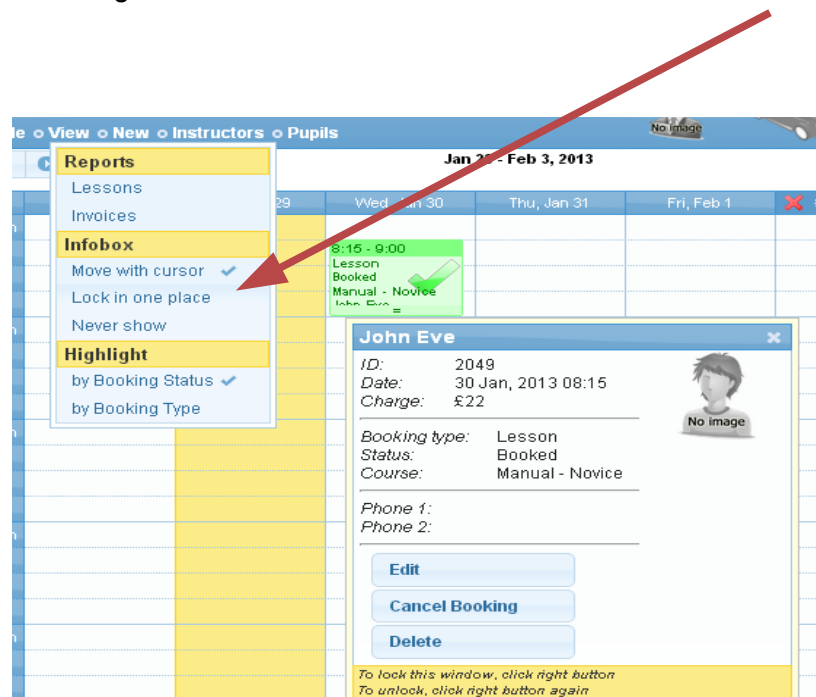
Edit Booking

Day, time, duration, type and status are available at the top part of the form. The list of courses is fetched from "Courses and Rates" page.

To select a subject, click little green plus sign next to pupils name then click on a subject.

To add or remove a pupil, just click on the appropriate link.

> If you want to change the style of date and time selectors, please click Preference in the top right corner. The available styles are JQuery, iPad, Android and Sense UI.

Charge Fee

To change the lesson fees, you can click on 'Receipt' or just on the fee sum. The Receipt window will open up where you can also see the fees breakdown.

For example:

Lesson	£22.00
Driving test charge back	£62.00
Hazard perception DVD	£13.00

The total will be automatically calculated.

If you have actually received this money, click on edit box where you can see 'Received on' and then select the date. The form will be recalculated and the totals will be automatically inserted into the amount box.

Click OK.

The booking form will now display that you have received the money. If you click on the plus sign, it will show the date that the money was received.

Choose Subject

Click on the plus sign next to the pupil's name, a drop down window opens where you can tap on Subjects. A Lesson Subjects window opens up where you can add subjects, assign marks and enter your lesson comments which will subsequently appear in the pupils progress report.

Comments tab in booking form

The comments tab is a private memo for the instructor; it will never appear in the pupil progress report

Invoices tab in booking form

The invoice tab will only show paid invoices, draft and unpaid will never appear because you can only draw money from pupil credit towards your lesson fees.

To draw the money from the invoice, click on the appropriate amount in the "Paid" column. If you confirm then the list will be recalculated and the fee will show as received.

Booking Form ✕

| Lesson | **Comments** | Invoices |

These comments are for instructors use only.

To create an entry in progress report:
  1. Select Lesson tab
  2. Click on a plus sign next to the pupil.
  3. Click on the subject name.

You can choose up to 5 subjects per lesson and write any comments.

To view the report:
  1. Click Control Panel
  2. Make sure Pupil Tab is selected
  3. Click Progress Report

Delete this lesson   Reminder   Submit   Cancel   Help

View Lessons Report

In order to view Lessons Report for a particular student, click on 'View' and then on 'Lessons' under Reports. The Lesson Reports can be viewed according to the selected week, payment status or both. Depending on your selection, Lessons Report opens up in a new window.

Lessons Report

Pupil Name: **Susan B**
Instructor: **Connor Davidson**
Date: **Friday, January 2013, 11:34:40 AM**   Lessons • Invoices   Items per page: 20

If a lesson has more than one pupil assigned then the lesson will appear more than once in this report, calculating all fees of all assigned pupils in the lesson.
Lesson will not appear in this report if no pupils are assigned.

Date	Time	Test time	Duration	Lesson kind	Pupil	Course	Charge	Paid
Dec 31, 2012	09:30 AM		01:00	Lesson	Susan B	Manual - Novice	£ 22.00	£ 0.00
Jan 10, 2013	08:00 AM		00:45	Lesson	Susan B	Manual - Novice	£ 22.00	£ 0.00
Jan 14, 2013	08:15 AM		00:30	Lesson	Susan B	Manual - Novice	£ 22.00	£ 0.00
Jan 15, 2013	12:30 PM		02:00	Lesson	Susan B	Manual - Novice	£ 22.00	£ 0.00

Invoice

When you open an invoice for the very first time the default dialog box will appear where you have to set up certain information which will appear in every invoice created. This information is stored for every single invoice created, so if in the future you need to change any of this information, previous invoices will not be affected.

New Invoices to pupils tab

Vendor name
The name of your Driving School

Vendor address
The registered address of your business

First item
This is usually 'Driving lessons'

Unit cost
The lesson fee

Quantity
The number of prepaid lessons

New invoices to instructors

Vendor name
The name of your Driving School

Vendor address
The registered address of your business
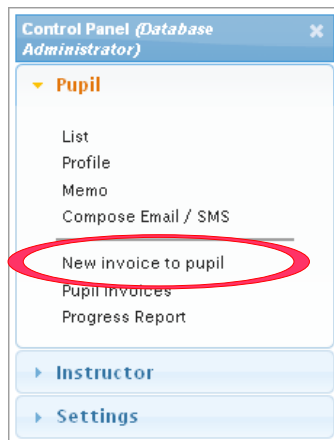
First item
Franchise fee

Unit cost
Franchise amount

Quantity
Usually 1

Create New Invoice

In order to create an invoice, click on 'Control Panel' and then on 'New Invoice to Pupil' under Pupil header.

A new invoice will be compiled according to your default settings inserting all appropriate information to the right fields. A single item will be inserted automatically, if you want to add further items click the plus icon on the left side. Review your information and click 'Submit'

The invoice will be created as a draft. When you receive payment open the same invoice.

Please note that the invoice will initially be locked, this means that you cannot change any of the fields. To change any of the fields you will need to click on the yellow padlock which will then turn to green unlocking the invoice. Not every invoice can be changed. If the invoice was not created by you, then access will be denied. If a driving school created the invoice, then an instructor will be able to draw payments towards lesson fees from it but not be able to make any other changes.
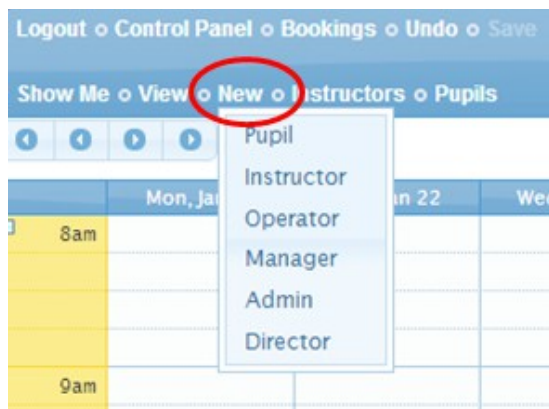
Chapter 3

Making your way around as a director

When you log in as a director, you have a higher degree of control over the features of tutorDIARY.

Create New Accounts

Click on 'New' and choose the type of account from the drop-down box. Once the form opens, enter the required details, select the user notification option and click 'Create Account'.

As a Director, you can create new accounts for Pupil, Instructor, Operator, Manager, Admin as well as Director. Once you have created the new account, you can notify the person by email or SMS.

Driving School Profile

tutorDIARY is not restricted to a single driving school. In fact you can have as many as you want. You can change the selected school by clicking on the title in the top left corner. A list with your driving schools will appear. Each school can have its own theme, so you can see at glance which driving school is selected.

> To change the theme, click Preference.

To view driving school profile, click on Control Panel and then 'Driving School Profile' under Settings.
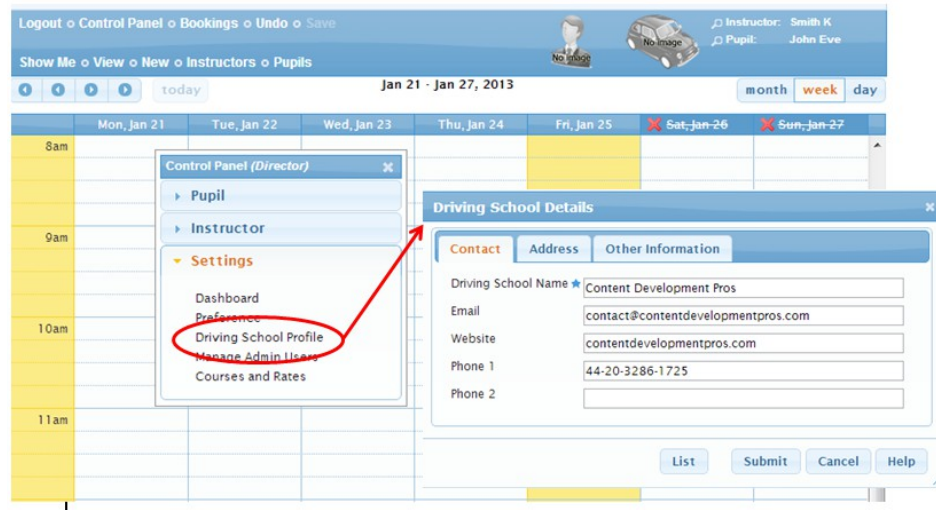
Manage Admin Users

To manage your Admin Users, open Control Panel, select Settings and click Manage Admin Users.

When a dialog box opens it reveals a User List, which cannot be accessed by instructors. By clicking on any user, you can change access permissions such as Diary Access and reset the password.
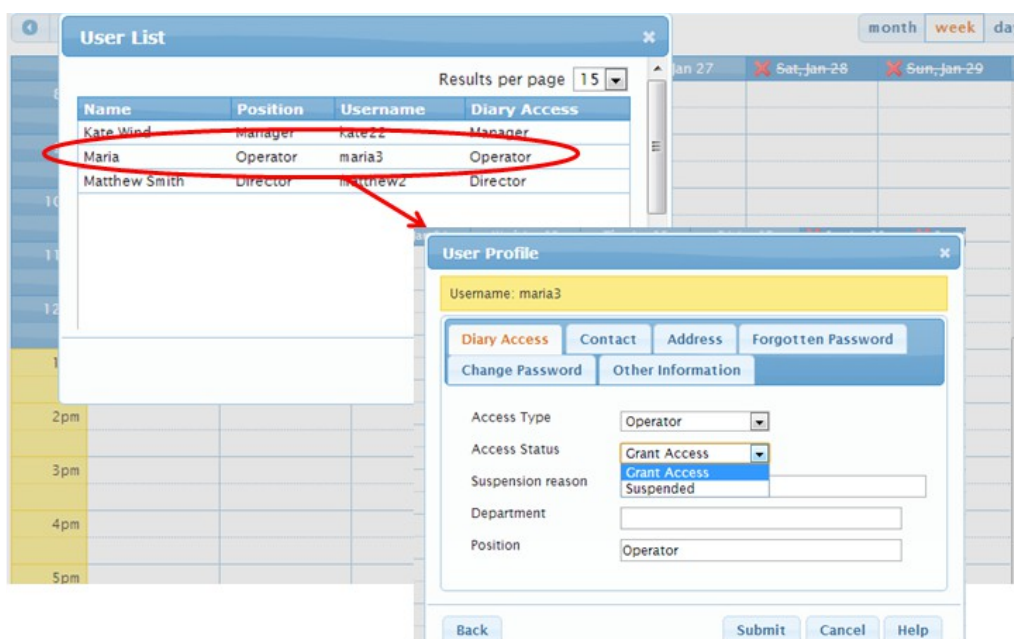
Please note: Every instructor has a User Profile similar to Admin but with different access permissions. The User Profile for instructors is accessible from Instructor Profile Only.

Pupil access to the diary is disabled in this version.

Courses and Rates

To view and edit courses and rates, click on Control Panel and then 'Courses and Rates' under Settings. A new window opens which shows the different courses, their icons, lesson duration, midweek and weekend rates.

Courses and Rates
Content Development Pros

- ● Courses apply to all instructors in the driving school
- ○ Allow instructors to have their own courses

Save option   New course
               Save All
               Reset Courses

Preset Course	Duration		Midweek Rate		Weekend Rate
Introductory lesson (manual)	00:45		£ 9.99	£	9.99
Introductory lesson (automatic)	00:45		£ 10.99	£	10.99
Practical Test (manual)	02:00		£ 48.00	£	52.00
Practical Test (automatic)	02:00		£ 52.00	£	56.00

Course	Icon	Lesson Duration	Midweek Rate	Weekend Rate	
Theory		01:00	£ 22.00	£ 24.00	
Manual - Novice		01:00	£ 22.00	£ 24.00	
Manual - Partly Trained		01:00	£ 22.00	£ 24.00	
Manual - Motorway Lesson		01:00	£ 24.00	£ 26.00	
Manual - Pass Plus		01:00	£ 24.00	£ 26.00	
Manual - Refresher Course		01:00	£ 25.00	£ 27.00	
Automatic - Novice		01:00	£ 24.00	£ 26.00	
Automatic - Partly Trained		01:00	£ 24.00	£ 26.00	
Automatic - Motorway Lesson		01:00	£ 26.00	£ 28.00	
Automatic - Pass Plus		01:00	£ 26.00	£ 28.00	
Automatic - Refresher Course		01:00	£ 27.00	£ 29.00	
Motorcycle		01:00	£ 25.00	£ 27.00	
PDI: Part 1		01:00	£ 25.00	£ 27.00	
PDI: Part 2		01:00	£ 30.00	£ 32.00	

Edit Course

Course	Manual - Partly Trained
Icon	
Lesson Duration	01:00
Midweek Rate	£ 22.00
Weekend Rate	£ 24.00

Please note:
The list is not saved until you click **Save All**

Delete   Change Icon   OK   Exit

To edit a particular course, click on a course line.

The lesson duration and rates will be assigned to any new lesson you insert into the diary.

For example:

If you are booking a lesson for a selected pupil with assigned course "Manual Novice" then the system will look in this table and insert appropriate fees considering weekends.

Dedoc Software Ltd.   www.dedoc.co.uk

tutorDIARY Website   www.tutordiary.com

tutorDIARY Login Pages   www.tutordiary.net