

Switch to Opero in 14 days

Checklist for the head teacher and bursar. opero.co.ke/switch

Before day 1

- ☐ Choose your census date (the day your old figures are struck, for example the last day of the month).
- ☐ Ask your old system for a full export of learners, guardians, fee balances and staff. Keep it: it is your history.
- ☐ Download the templates from opero.co.ke/switch. The rows under the heading are examples. Delete them and type your own.

The plan

When	We	You
Day 1 Learners and guardians	Check your sheet, run the preview, load the roll with you watching.	Send the learner and guardian list as it is (Excel or an export from your old system).
Day 3 Fee structure and balances	Load the fee structure; bring opening balances across as at your census date.	Choose the census date and send the fee structure and the balance list for that date.
Day 5 Parent portal invitations	Check guardian phone numbers and prepare the invitation wording.	Tell parents to expect it and tell us who answers the phone at school.
Day 7 Staff and payroll	Load staff; set up payroll with the tax rates your accountant gives us.	Send the staff list. Your accountant confirms PAYE, SHIF and housing levy rates.
Day 10 Parallel run	Compare Opero totals with your old system line by line and fix differences.	Keep using the old system for a few days and tell us every difference you see.
Day 14 Go live	Switch your M-Pesa and bank matching on and stay on call the first week.	Stop entering new work in the old system. Keep its export.

Files to prepare

File	Needed columns	How it moves
Learners and guardians	firstName, lastName, gender, dateOfBirth, class	You upload; preview first

Opening fee balances (as at your census date)	Admission Number, Balance	You upload; preview first
Bank statement (to match fees paid)	Date, Narration, Credit	You upload; preview first
Fee structure (by class and term)	Class, Term, Fee item, Amount (KSh)	We load it for you
Staff (for HR and Payroll)	Full name, Role, Phone	We load it for you

Go-live check (day 14)

- ☐ Opero totals match the old system for fees owed, on the census date.
- ☐ A few parents have signed in to the portal with their phone number.
- ☐ M-Pesa and bank payments are matching to the right learners.
- ☐ Old system exports saved in a safe place. New work is entered in Opero only.

Setup fee KSh 0 for a switching school; the scope of moving your records is agreed in writing first. Opero is a web app: there is no timetable, library or biometric module yet. Questions: opero.co.ke/switch