



Billing for **Mosdos**

English

User Handbook

Billing, statements and pledges for schools, mosdos and shuls

Version 1.25 · 23 October 2026

Contents

1	What's new	36
2	Quick start	37
3	Parents	4
4	Overview: the year's pot	7
5	Children and grades	8
6	Charges and the weekly run	12
7	Payments and direct debits	13
8	Payer types	15
9	Statements	17
10	Follow-ups	21
11	Reports and exports	21
12	Address labels	23
13	Messages: texts and emails	24
14	Pledges	25
15	Settings and "Your mosed"	26
16	Shuls and other organisations	28
17	Hebrew	30
18	Install the app	32
19	The demo	33
20	Plan and accounts	34

21	Users and accounts	35
22	Need help?	36

What's new

- **23 Oct 2026 (v9): My organisations:** if your login can open more than one organisation, you now land on a page with a tile for each one after signing in, and the logo at the top takes you back there. With one organisation you go straight in. Also: the clients list has a **Columns** button, **Saved filters** next to *Filters*, each child's grade next to its name and a **Hebrew name** column; the client's name at the top of their page is a drop-down to jump to another client; statements let you choose the dates first; and the demo uses obviously made-up names (Family A, Child A1). Organisations are added, and given to people one by one, in *Settings* › *Organisations* (Starter 1, Standard up to 3, Pro up to 10).
- **23 Oct 2026 (v8): Tidier header** in the app and in Admin: every button the same size, in one even row. **My profile** has its own person icon next to *Sign out*: your details, password, privacy and data access, and the devices where you're signed in (it's still under *Settings* too). **Accounts:** an organisation's admin can add separate accounts, for example for each institution or branch, in *Settings* › *Accounts* (as many as the plan allows). Each account has its own clients, settings, numbering and statements, and you choose who can open which one. Switch between them from the menu at the top.
- **23 Oct 2026 (v7, later): Standing-order checks and part payments:** any payment from the client around the due date (from 3 days before to the end of the grace days) now closes the check, whatever the amount, including imported ones. A part payment says so on the closed check. *Received* still asks you for the real amount and date.
- **23 Oct 2026 (v7): New address:** billingformosdos.com. The .co.uk links forward there; sign in once. **Standing orders:** each one now needs its *Paid into*. A few days after the due date (3 by default, *Settings* › *Payments in*), a follow-up asks whether the money came in. Press *Received* to record it after checking the amount and date, or *Not received* to leave a note. Nothing is ever posted automatically. **Logins:** invite your staff with a link you copy and send yourself, as Admin, Staff or Read-only, and choose what each login can do. **Privacy** (*Settings* › *Privacy*): the Billing for Mosdos team can't see your clients unless you give access, and you can take it back at any time. **Support:** write to us from the new *Support* page. **Paid into** can be set straight from *Payments* and from *Overview* › *By account*.
- **23 Oct 2026 (v6, later): Setting up a new organisation:** *Settings* › *Setup* is a checklist: name and logo, type and words, charges, year start and moving up, where the money lands, statements, your process and importing clients. **New clients from the template** (*Import* › *New clients (template)*): download the Excel template, fill it in and upload it. Every row is checked (required fields, dates, amounts, missing phone or address) before anything is saved. **Your process** (*Settings* › *Your process*): describe how you bill, in your own words. *Suggest settings* is built and will be switched on later. A client's charge can now also be **yearly**.
- **23 Oct 2026 (v6): Statements in bulk:** a new *Statements* page downloads every client's statement for any period, as one PDF or a ZIP of separate PDFs. **Paid into:** list your receiving accounts in *Settings* › *Payments in* (bank, voucher account, online platform) and each payment can say where the money landed; *Overview* › *By account* totals them, with CSV and PDF. **Tap to call:** every phone number dials straight from a phone or a tablet with a SIM. **Card payments** through your own Stripe account are built in, switched off until Stripe is connected.

- **23 Oct 2026 (later): Auto-debit status is the same everywhere.** Home, *Weekly auto-debits*, *Overview* and *Settings* › *Billing* all show one line worked out from the real auto-debits and the on/off switch: on or off, the weekly total, how many children and clients, and the next charge date. The old "Auto-debits this week £0" tile and "No auto-debits yet" now say when the first charge is. A client who has left or is muted shows why there is no auto-debit instead of "None set up". *Active clients* on Home counts the same as the *Active* chip on Parents.
- **23 Oct 2026: Parents: status chips you can combine.** *Active* (Enrolled + Left — owing) is the default; click *Enrolled*, *Muted*, *Left — owing* or *History* to combine them, and your choice is remembered at every login. Muted clients show in light grey under Enrolled. **Drag clients onto a status** (one, or all the selected ones) to move them; every move asks **when and why**, and it's kept in the client's **Status history**. **Mute** is one button that stays pressed while muted. **Customise Home and Overview** (Pro): move, choose, resize, add or remove tiles. **Statement PDF** in the side panel. The footer logo goes to the front page.
- **22 Oct 2026 (night, last):** Monthly auto-debits can be charged on **a date of the month** or **a Hebrew date (Rosh Chodesh...)**, with the next dates in both calendars. **Yearly and one-off charges:** Bedek Habayis is now one of a list you can add to (per grade, at the start of the year, on a date every year, or once; never back-dated). **Yearly grade-up:** choose where each grade goes; a reminder comes before the date and nothing moves until you confirm.
- **22 Oct 2026 (night, later):** New **Overview** page: the target to raise, charged so far, actually collected and outstanding, by category and through the year. **Payment arrangement** on each client: payer types, standing orders with the bank account and reference, an **Allocate standing order** follow-up on each expected day, and import suggestions from the amount and reference. **Recurring pledges** (for example £100 a month on Rosh Chodesh; monthly, Hebrew monthly or weekly) that show on Follow-ups as **To collect**. **Emails:** choose the clients with search, filters (status, payer type, balance, grade) and tick boxes (sending stays off until email is set up). **Labels:** bold and left / centre / right for the name, children and address lines, with a preview.
- **22 Oct 2026 (night): Parents:** status tabs (Active · Left — owing · Muted · History) with counts, row numbers, all columns shown, click a title to sort, drag to move, the eye to hide; your layout is remembered. The small unlabeled number is now a clear **Follow-ups** column. The side panel shows the **payment arrangement** and every transaction. **Home:** four equal tiles and three equal cards; *Show all* opens the full list of who owes and of payments. **Charts:** hover for figures, click to open the list behind them, click the legend to hide a series. **Statements:** tighter PDF with shaded rows. **Grade names** from Settings now show everywhere (renaming a grade renames it on every child). The **parsha** is worked out from the Hebrew calendar for any year (no sheet). The **?** next to page titles is gone (Help is in the menu). *What's new* is folded away and shows the last 30 days.
- **22 Oct 2026 (evening): Clients** is now the word everywhere for the people you bill (students and parents, members, donors), instead of "families". The organisations that own accounts are called **Organisations** in the admin panel. **New plans:** Starter has the full billing system, Standard has everything in the app, Pro adds features tailored to you (see *Plan and accounts*). **A richer look:** a navy banner with gold, stronger tabs with a clear active tab, and larger, bolder headings; lists stay calm.
- **22 Oct 2026 (later): Payer types** (standing order / reliable manual / chase, per child, suggested from the payments and confirmed by you). **Bulk add** clients and payments by pasting rows from Excel. **Files** on every client (contracts etc.). **Pages** on every long list, with lines per page and *Make this my default*. **Trends** on Home. **One Follow-ups list** everywhere (Home, client page, side panel). *Amount per week* now always equals the auto-debit, and changing it changes the auto-debit. One child's statement

shows that child's lines plus the lines for all the children marked *All children (old program)*. Statements show the parsha and English date only (the Hebrew date is a setting). *School year* on a statement runs from the start of the billing year (1 Elul). Clients who left with nothing owing are under **History**, not Muted. **Plan & accounts** page, sub-accounts and the Split tool.

- **22 Oct 2026: Leavers:** *Left – owing* (stays in every list with the balance; auto-debits stop at the year end) and *Left – settled* (auto-debits stop now and the client moves to History, with **Revive / re-enrol** if they come back). **Yearly Bedek Habayis charge** in Settings › Billing: it starts with next year's first Sunday and is never back-dated. The year now starts on 1 Elul (billing on the nearest Sunday).
- **22 Oct 2026: The Fundd history (Jan 2024 to today) is in.** Charges and payments show on each client's page, with weekly charges on the Sunday of their week; a client whose history doesn't match its Fundd balance waits on the reconcile list until you choose. Notes written in the old program appear as a short line on statements, and the original note shows in small grey text on the parent's page.
- **22 Oct 2026: One Messages page** for texts and emails together (tabs *Texts* and *Emails*), with one log for both. Sending stays off: until a key is set up and switched on, everything is logged as a dry run.
- **22 Oct 2026: One Follow-ups page** (to-dos and follow-ups together) with categories: promise, standing-order check, missed payment, call, send statement/email, fix info, other. Every item has **Edit**, **Add note**, **Snooze (+1 day, +1 week or a date)** and **Done**, on the Follow-ups page and on the parent's page. **Standing orders** with their expected day and amount: if no payment is recorded within 2 days, a *Standing-order check* appears (a payment is never assumed). **This week's nudge** at the top lists texts to send, high balances to call, statements to send, promises due and missed payments. All 28 existing follow-ups and every to-do are on it.
- **22 Oct 2026: Weekly auto-debit for the coming week**, at each child's own amount, on your charge day, with a main **on/off switch** and a **first charge date** in Settings › Billing, plus a choice for children who start mid-week. The enrolment date stays separate from the first charge. **Hebrew dates** now show beside the parsha on statements, the ledger and Home.
- **22 Oct 2026: Bringing over the history from the old program:** weekly charges can be moved to the Sunday of their week (same amounts), and each client's history is checked against its exported balance. Matches keep the balance exactly as it is; clients that don't match wait on a list for you. See **History from the old program** under Payments.
- **22 Oct 2026: Mute one child, not only the whole client:** only that child's auto-debits pause, and the other children carry on. Each child can also have its own **Pays by** (e.g. standing order, card, childcare funding, a company) and a **Funding / top-up** note.
- **22 Oct 2026: Muting now pauses auto-debits and automatic reminders straight away** (from the day you mute), and a muted client shows a **Muted – auto-debits paused** badge on their page and in every list. Their record, history and balance stay. **Imports now check duplicates by payer first:** the same payer, amount and date is *Already recorded*, even if it was put on another client; two different payers on the same day are never duplicates. Each row also shows **Previous payments from this payer** and which client they went to, and that client is suggested.
- **22 Oct 2026: Follow-ups now shows every open promise and follow-up**, not only those with an amount. *Paid since* counts real payments only (not opening balances or corrections).
- **22 Oct 2026: Payment imports now check against payments already recorded.** Each row comes out as one of four outcomes: matched (new), to review, possible duplicate, or already recorded. Nothing that is already in the system is added twice unless you say so. See **Checking an import** under Payments. **Every**

table and list now shows a row count ("68 rows", or "Showing 23 of 68" when a view, filter, search or tab narrows it).

- **22 Oct 2026:** New address: billingformosdos.com. The old tab.bot link forwards here. If you installed the app, add it again from the new address and sign in once.
- **22 Oct 2026:** The guide is now also in **Yiddish (אידיש)** and **Hebrew (עברית)**: use the language switch at the top of the guide. Each language also has a **printable handbook** (a PDF with a cover and contents page) to download.
- **22 Oct 2026:** New **Billing for Mosdos** logo (the navy tag with the gold roof) on the app icon, browser tab, front page, login, guide and link previews. Inside your own account, **your organisation's logo** sits at the top of every page; Billing for Mosdos appears in the footer. The main link now always opens the **front page** first. When you're signed in it has an **Open my account** button, and the app itself lives at /app. On iPhone, remove the old home-screen icon and add it again to see the new one.
- **22 Oct 2026:** The Billing for Mosdos icon became the site and app icon. Your own logo stays on your statements.
- **22 Oct 2026:** Billing for Mosdos name, logo and public pages (About, Contact, Terms, Privacy). Contact form with an owner inbox.
- **22 Oct 2026:** New **Parents hub**: saved-view tabs, select many and act on them, filter chips and column filters, auto-fit table, double-click to edit, side panel.
- **22 Oct 2026:** **Shuls and other organisations**: organisation type, your own words on screen, **pledges** (aliyos, kibbudim, nedarim, appeals...), and a shul demo.
- **22 Oct 2026:** **עברית**: the whole app can switch to Hebrew, laid out right to left.
- **22 Oct 2026:** **Texts** (balance SMS with preview and dry run) and **address labels** (Avery L4737 and more).
- **22 Oct 2026:** Public **demo**, "Your mosed" and Billing settings, termly charges, sibling discounts.
- **22 Oct 2026:** **To do** list, installable app, faster loading, one tidy design throughout.

Quick start (TL;DR)

Billing for Mosdos keeps everyone's balance up to date. It adds regular charges automatically, records payments, and prints clean statements.

1. **Set up your organisation:** Settings › Your mosed. Add your name, logo, address and bank details, and choose School / Shul / Other.
2. **Set how you bill:** Settings › Billing. Choose the charge day and your charge types (e.g. Tuition £120 weekly), plus any sibling discount.
3. **Add your people:** Import a spreadsheet (Import), or press **Add parent**. Add the children or family members.
4. **Start the charges:** on each parent, open *Children & auto-debits* and set an auto-debit start date. Charges then add themselves every week, month or term.
5. **Record payments:** Payments › Add payment, or upload a bank file. Balances update immediately.

6. **Send statements:** open a parent › Statement › Download PDF, share a link, or text balances (Texts).

7. **Keep on top:** Home shows who owes the most, and **To do** lists what needs attention.

Tip: try everything first in the demo. Nothing you do there is real, and it resets every day.

Parents (or members)

What it's for: your daily hub, with everyone in one list showing balance, children, phone and last payment.

Your mosed (demo)

עברית

HomeOverviewParentsFollow-upsPaymentsMessagesLabelsImportWeekly debitsToolsPlanSettingsHelp

Parents

Payer typesBulk addAdd parent

Active23Enrolled20Muted2Left — owing3History3

Tip: drag clients onto a status to move them

Search name, phone, child, ref...FiltersViews▼CSVExcelPrint

23 rows · owing £14,145.00

#		Ref	Name	Follow-ups	Children	Phone	Balance▲	Weekly	Last payment	Last amount	Last method	Last descript
1	☐	107	David Reich DEMO	2 open	Moishy, Pinny, Ya... Grade 1, Grade 2, Gr	07700 900106	owes £4,130.00	£390.00	5 Oct 26	£390.00	Cash	Payment
2	☐	116	Naftali Neuberger DEMO	1 open	Shia, Lipa Grade 1, Grade 2	07700 900115	owes £2,315.00	£245.00	5 Oct 26	£245.00	Cash	Payment
3	☐	126	Hillel Horowitz DEMO	2 open	Shia, Lipa Grade 2, Grade 3	07700 900125	owes £1,885.00	£255.00	2 Oct 26	£400.00	Bank transfer	Payment
4	☐	106	Yosef Pollak DEMO	2 open	Berish, Shia, Lipa Grade 3, Grade 1, Gr	07700 900105	owes £1,540.00	£385.00	5 Oct 26	£385.00	Cash	Payment
5	☐	108	Shlomo Steiner DEMO	1 open	Zishe Grade 2	07700 900107	owes £1,265.00	£95.00	5 Oct 26	£95.00	Cash	Payment
6	☐	120	Gershon Weingarten ...		Chezky, Nuchem Grade 2, Grade 3	07700 900119	owes £665.00	£265.00	25 Aug 26	£530.00	Bank transfer	Payment
7	☐	121	Chaim Yudkowitz ...	1 open	Shmuel, Yoel Grade 3, Grade 1	07700 900120	owes £650.00		10 Sep 26	£200.00	Bank transfer	Payment
8	☐	122	Meir Zilberman ...		Leibish, Mendel Grade 1, Grade 2	07700 900121	owes £650.00		10 Sep 26	£200.00	Bank transfer	Payment
9	☐	119	Levi Tauber ...		Aryeh, Eli Grade 1, Grade 2	07700 900118	owes £485.00	£240.00	19 Oct 26	£95.00	Standing order	Standing o

Step by step

1. **Search** with the box at the top: name, phone, child or account number.
2. **Status chips** at the top: **Active** (the default: Enrolled + Left — owing), then **Enrolled** · **Muted** · **Left — owing** · **History**, each with its count. Click Active for the usual list. Click a status to see only that one, then click others to add them (for example Enrolled + History); click one again to take it off. Muted clients are still enrolled, so they show in light grey under Enrolled. Your choice is remembered every time you log in, until you change it. **Views ▼** keeps your own saved filter sets (press *Save the current filters as a view*; ... renames, updates, moves or deletes one).
3. **Filters:** press *Filters* for status, balance, flags, grade, "owing at least £..." and "no payment in ... weeks". Each active filter shows as a chip; press × to remove it.
4. **Column filters:** hover a column header and click the funnel. Filter by text, a number range, a date range, or a list of values.

- Columns:** every column shows. Click a column title to **sort** (**Shift+click** another one for a second sort), **drag** a title left or right to **move** the column, and click the **eye** on a title to **hide** it. *N hidden columns* ▼ above the table brings one back. Your layout is remembered for you on this account straight away, with no Save button (Settings > Columns lists them all and has *Back to the standard layout*).
- Edit in place:** double-click a phone, email, address, note, arrangement or follow-up cell. Press Enter to save or Esc to cancel. An *Undo* appears after each save.
- Side panel:** click > at the start of a row, or double-click the row. It shows details and notes, follow-ups, the **payment arrangement** (each child's payer type and method, how they usually pay, standing orders with their bank account and reference) and **all transactions** (scroll down for older ones), and has a quick add for a payment or charge. The # column numbers the rows; **Follow-ups** shows how many open follow-ups a client has (click it to open the panel).

Live demo with made-up families. Try anything: it resets every day. [Reset demo](#) [Other demo](#) [Exit demo](#)

Your mosed (demo) Home **Parents** To do Follow-ups Payments Texts Labels Import Weekly debits Tools Settings Help עברית

Parents ? [Add parent](#)

[All parents](#) [All active parents ...](#) [Who to call ...](#) [Last payments ...](#) [Needs setting up ...](#) [Muted \(paid up\) ...](#) +

Search name, phone, child, ref... [Filters](#) [Auto](#) [Comfortable](#) [Compact](#) [Columns...](#) [CSV](#) [Excel](#) [Print](#)

Status: Active Balance: Any balance Flags: Any flags Grade: Any grade

Owing at least £ No payment in (weeks) If both are set: Either one ☐ Last payment ignores standing orders

[Clear all](#) [Done](#)

14 rows · owing £5,825.00

☐	Ref	Name	Children	Phone	Balance ▲	Weekly	Last payment	Last amount	Last method	Last description	Flags	
☐	>	1007	Mordche Hirsch	Leibish, Zalmen, Duvid Grade 3, Grade 2, Grade 1	07700 900160	owes £1,355.00	£330.00	2 Oct 26	£1,155.00	Bank transfer	Payment – thank you	
☐	1 1	1009	Pinchas Lieber	Nachman Grade 1	07700 900150	owes £840.00	£120.00					
☐	>	1001	Avrohom Adelman	Yitzchok, Moishe Grade 1, Grade 3	07700 900431	owes £805.00	£230.00	2 Oct 26	£805.00	Bank transfer	Payment – thank you	
☐	1	1004	Eisen	Chaim, child 2 Grade 3, Grade 1	07700 900619	owes £805.00	£230.00	2 Oct 26	£805.00	Bank transfer	Payment – thank you	
☐	1	283	Demo Sample DEMO	Shmuel, Chaim Yakov Grade 1, Grade 3	07000 000000	owes £600.00	£240.00	21 Oct 26	£300.00	SY bank	283 SCHOOL FEES	
☐	>	284	Demo Cohen DEMO	Mendy	07000 000001	owes £580.00	£145.00	21 Oct 26	£145.00	SY bank	MENDY	

Acting on many at once: tick rows (or the header box for everyone matching). A bar appears at the bottom with **Mute / Unmute, Send text, Email, Export CSV/Excel, Labels, Add to-do, Add charge (or pledge)**.

Live demo with made-up families. Try anything: it resets every day. [Reset demo](#) [Other demo](#) [Exit demo](#)

Your mosed (demo) Home **Parents** To do Follow-ups Payments Texts Labels Import Weekly debits Tools Settings Help עברית

Parents ? [Add parent](#)

[All parents](#) [All active parents ...](#) [Who to call ...](#) [Last payments ...](#) [Needs setting up ...](#) [Muted \(paid up\) ...](#) +

Search name, phone, child, ref... [Filters](#) [Auto](#) [Comfortable](#) [Compact](#) [Columns...](#) [CSV](#) [Excel](#) [Print](#)

14 rows - owing £5,825.00

☐	Ref	Name	Children	Phone	Balance ▲	Weekly	Last payment	Last amount	Last method	Last description	Flags
☒	1007	Mordche Hirsch	Leibish, Zalmen, Duvid Grade 3, Grade 2, Grade 1	07700 900160	owes £1,355.00	£330.00	2 Oct 26	£1,155.00	Bank transfer	Payment – thank you	
☒	1009	Pinchas Lieber	Nachman Grade 1	07700 900150	owes £840.00	£120.00					
☐	1001	Avrohom Adelman	Yitzchok, Moishe Grade 1, Grade 3	07700 900431	owes £805.00	£230.00	2 Oct 26	£805.00	Bank transfer	Payment – thank you	
☐	1004	Eisen	Chaim, child 2 Grade 3, Grade 1	07700 900619	owes £805.00	£230.00	2 Oct 26	£805.00	Bank transfer	Payment – thank you	
☐	283	Demo Sample DEMO	Shmuel, Chaim Yakov Grade 1, Grade 3	07000 000000	owes £600.00	£240.00	21 Oct 26	£300.00	SY bank	283 SCHOOL FEES	
☐	284	Demo Cohen DEMO	Mendy Grade 2	07000 000001	owes £580.00	£145.00	21 Oct 26	£145.00	SY bank	MENDY	
☐	1011	Eliezer Neuman	Avrumi Grade 2	07700 900396	owes £420.00	£120.00	2 Oct 26	£420.00	Standing order	Payment – thank you	
☐	1005	Shmuel Frankel	Yossi Grade 2	07700 900544	owes £420.00	£120.00	2 Oct 26	£420.00	Bank transfer	Payment – thank you	
☐	1006	Boruch Gutman	Ari Grade 1	07700 900346	paid up	£100.00	2 Oct 26	£700.00	Cash	Payment – thank you	
☐	1012	Chaim Perlman	Yanky	020 8800 1234	paid up						auto-debit not set up

2 selected [Select all 14 matching](#) [Mute](#) [Unmute](#) [Send text](#) [Email](#) [Export CSV](#) [Excel](#) [Labels](#) [Add to-do](#) [Add charge](#) [Clear](#)

Your mosed (demo) Home Overview **Parents** Follow-ups Payments Messages Labels Import Weekly debits

Parents

[Active 23](#) [Enrolled 20](#) [Muted 2](#) [Left – owing 3](#)

Search name, phone, child, ref...

23 rows - owing £14,145.00

#	☐	Ref	Name	Follow-ups	Children	Phone	Balance ▲	Weekly
1	☐	107	David Reich DEMO	2 open	Moishy, Pinny, Ya... Grade 1, Grade 2, Grade 3	07700 900106	owes £4,130.00	
2	☐	116	Naftali Neuberger DEMO	1 open	Shia, Lipa Grade 1, Grade 2	07700 900115	owes £2,315.00	
3	☐	126	Hillel Horowitz DEMO	2 open	Shia, Lipa Grade 2, Grade 3	07700 900125	owes £1,885.00	
4	☐	106	Yosef Pollak DEMO	2 open	Berish, Shia, Lipa Grade 3, Grade 1, Grade 2	07700 900105	owes £1,540.00	
5	☐	108	Shlomo Steiner DEMO	1 open	Zishe Grade 2	07700 900107	owes £1,265.00	
6	☐	120	Gershon Weingarten ...		Chezky, Nuchem Grade 2, Grade 3	07700 900119	owes £665.00	
7	☐	121	Chaim Yudkowitz ...	1 open	Shmuel, Yoel Grade 3, Grade 1	07700 900120	owes £650.00	
8	☐	122	Meir Zilberman ...		Leibish, Mendel Grade 1, Grade 2	07700 900121	owes £650.00	
9	☐	119	Levi Tauber ...		Aryeh, Eli Grade 1, Grade 2	07700 900118	owes £485.00	

Mr & Mrs Naftali Neuberger [x](#)

Ref 116 • owes £2,315.00

[Enrolled](#) [Mute](#) [Move to ▼](#) [All children ▼](#)

[Statement PDF](#)

Phone: 07700 900115 Other phones:

Email: naftali.neuberger@example Address: 55 Demo Road, London

Postcode: N16 6AA Follow-up date: mm/dd/yyyy [📅](#)

Notes: Made-up demo family (not real).

Follow-ups: [Add follow-up](#)

[Call \(high balance\)](#)

Chase: owes money
On the chase list (payer type). Call or write; record any promise here.
added 23 Oct 26 • automatic

[Edit](#) [Add note](#) [Snooze](#) [Done](#)

Payment arrangement

Tips

- On a phone the list becomes cards. Tap a name to open the parent.

Calling a client: every phone number (Parents list, phone view, side panel, client page, Follow-ups) is a call link. On a phone, or a tablet with a SIM card, tap it and it dials straight away from that SIM. UK numbers are dialled in international form (+44...), so numbers typed as 07..., 020..., 44... or +44 0... all work. In the side panel, the green phone button next to the number calls it.

Bulk add, files and pages

- **Bulk add clients:** Parents › *Bulk add*. One child per line (repeat the parent's name for a brother or sister). Copy the rows in Excel, click the first cell and paste. *Check* shows what will be added; nothing is saved until you press *Add them*.
- **Bulk add payments:** Payments › *Bulk add payments*. One payment per line: date, client (name or ref), amount, method, description. They go through the same checks as an import (matched to a client, compared with payments already recorded) and wait in the review queue for you to tick and record.
- **Files:** each client has a *Files* tab for contracts, forms and letters (PDF, pictures, Word, Excel; up to 15 MB each, with a label). You can also attach files when adding a parent. Only signed-in users can open them; *Delete* moves a file to the bin, where it can be restored. Files are included in the full backup.
- **Pages:** every list longer than 25 lines is split into pages. Choose 25, 50, 100, 250 or All lines per page; *Make this my default* remembers it for your login. Printing always prints the whole list.
- **History:** clients who left with nothing owing are on the *History (left – settled)* tab of the Parents page; *Left – owing* has its own tab too. *Muted* is only for clients who are still enrolled but paused.

New clients from the template

What it's for: bringing all your clients in at once when you start (or adding many new ones), from one spreadsheet.

Home
Overview
Parents
Follow-ups
Payments
Statements
Messages
Labels
Import
Weekly debits
Tools
Plan
Settings
Help

Import

Payments & bank files
Review queue
Parents & children
New clients (template)
Past imports

New clients from the template

For a new organisation, or many new clients at once. Fill in the template (Excel is easiest: it has a Clients sheet, a Payments sheet, an example and "How to fill in"), then upload it here. Every row is checked first; nothing is saved until you press Import.

Download the Excel template
Clients CSV
Payments CSV

Required: surname (or organisation name) · first name (or "unknown") · how often · amount (0 is fine) · at least one child per client. **Recommended:** phone or email · address or postcode.

Clients file (Excel or CSV)

Choose File

demo_mosed_tpl.xlsx

Payments CSV (optional, if not in the Excel file)

Choose File

No file chosen

1 client has no charge start date: their charges start from 23 Oct 2026.

1 Ready

1 Children

1 Auto-debits

0 Payments

2 Errors

4 Warnings

1 Already in

Row	Client	Children	Charge	Check
2–3	Yossi Green #101 07700 900123	Dovid (Grade 1) Shloimy (Grade 2)	£60.00 weekly owes £120.00	! Already in the system: this client will be skipped
4	Brown 020 7946 0000	Chaim (Grade 1)	£150.00 monthly	Ready
5	Klein #205		£45.00 weekly	✖ First name is missing (write "unknown" if you don't know it) ✖ No child on this client: add at least one row with a child's first name ! No phone or email ! No address or postcode
6	Pinchas Weiss #206 07700 900456			✖ How often "fortnightly" isn't one of weekly, monthly, termly, yearly or none ✖ No child on this client: add at least one row with a child's first name ! No address or postcode

1. *Import > New clients (template) > Download the Excel template*. It has a **Clients** sheet, a **Payments** sheet (optional, for past payments), an **Example** and **How to fill in**. CSV versions are there too.
2. One row per client, or one row per child: put each further child on the next row and leave the client columns empty (or repeat the same *Client ref*).
3. **Required** (marked *): **Surname* (or *Organisation name* for a company or charity), *First name* (write **unknown** or ? if you don't know it: it's left empty), *How often* (weekly, monthly, termly, yearly or none) and *Amount* (0 is fine; it can be left empty when every child has its own *Child amount*). A mosed also needs at least one child per client. **Recommended**: a phone or email, and an address or postcode.
4. Upload the file. Every row is checked: the tiles count *Ready*, *Errors*, *Warnings* and *Already in* (tap one to see only those rows). Errors (in red) say exactly what to fix; warnings (in amber) don't stop the import.
5. Press **Import**. Rows with errors are left out: fix them in the file and upload it again. Clients already imported are skipped, so nothing is added twice.

Each client gets their auto-debit from *How often*, *Amount* and *Charge start date* (empty = the first charge date in Settings > Billing); an *Opening balance* becomes "Balance brought forward".

Overview: the year's pot

What it's for: one page for the school year: how much is supposed to be raised, how much has been charged, how much has actually come in, and what is outstanding. It isn't bookkeeping: there are no other income or expenses in it.

- **Target to raise**: by default the expected total, which is what has been charged this year plus the auto-debits and recurring pledges already set up to the year end. Owners can press **Set a target** to type their own figure for the year.
- **Charged so far, Actually collected** (real payments, not opening balances or corrections), **Outstanding** (charged this year, not yet paid) and what is owed now across all years.
- **Progress bars** to the target, a **By category** table (fees, pledges, Bedek Habayis and other charges: charged so far, still to come, expected) and a **Through the year** chart (hover for figures, click a week to see its payments).
- Use <> at the top to see another school year.

Payment arrangement (on each client, Children & auto-debits): the payer type for the client and for each child, the **standing orders** (how often, amount, day, the **bank account** it comes into and the **reference** on the bank line) and **recurring pledges**. On each standing order's expected day an **Allocate standing order** follow-up appears and closes by itself once a payment of that amount is recorded (within 3 days). When you import bank lines, a line with the standing order's amount and reference is suggested for that client.

Recurring pledges: for example £100 a month on Rosh Chodesh, or £50 a week. Monthly on a date, monthly on a Hebrew date (Rosh Chodesh or another day), or weekly (every 1 to 8 weeks), from a start date to an end date or open-ended. Each instalment is added as a pledge on its date (never for past dates), with a **To collect** follow-up until it's marked paid on the Pledges page. The next dates show in both calendars as you fill it in.

Customise Home and Overview (Pro)

Press **Customise** at the top of Home or Overview. Each tile gets a small bar:

- **Drag a tile** to move it (on a phone, use ↑ and ↓).
- **Change ▼** chooses what the tile shows: owing the most, latest payments, follow-ups, the charts, the target to raise, and more. A tile that's already on the page swaps places.
- **Size ▼**: small, medium, half, large or full width. Tiles in a row are always the same height.
- **✕** removes a tile; **+ Add a tile** brings one back; **Reset to default** restores the standard layout.

Press **Done** when finished. The layout is saved for your login straight away. This is part of the **Pro** plan.

Children and grades

What it's for: each parent's children (or a member's family members), their class or membership type, and their own weekly amount.

The screenshot displays the 'Billing for Mosdos' interface for a parent named Mr & Mrs Avrohom Adelman. The top navigation bar includes a 'Your mosed (demo)' link and a menu with 'Home', 'Parents', 'To do', 'Follow-ups', 'Payments', 'Texts', 'Labels', 'Import', 'Weekly debits', 'Tools', 'Settings', and 'Help'. The 'Parents' section is active, showing the family's name and a balance of £805.00. Below this, there are buttons for 'Add payment', 'Add charge', 'Statement', 'Log call / note', 'Mute', and 'Edit details'. The 'Children & auto-debits' section is highlighted, showing details for two children: Yitzchok (Grade 3) and Moishe (Grade 1). Each child's entry includes their enrollment date, weekly amount, and an 'Auto-debit' section with a 'Set up auto-debit' button. A 'Whole-family auto-debit' section is also present, with a 'Set up family auto-debit' button and an 'Add a child' button. The footer includes the 'Billing for Mosdos' logo and contact information.

1. Open a parent › **Children & auto-debits** › *Add a child*.
2. Enter the name (optional: a blank name shows as "child 1"), the grade or class, the enrolment date and the weekly amount.
3. Children move up a grade automatically each year (Settings › General › Grades). You can turn this off per child.

4. When a child leaves, set the grade to the "left" label and mark them **Left — owing** or **Left — settled** (see **Leavers** below).
5. **Pays by** and **Funding / top-up** (in *Edit*): how this child's fees are paid, for example standing order, card, childcare funding or a company, and a note such as "childcare funding covers 15 hours, parent tops up the extra hours". Two children of the same parent can pay in different ways. Both show on the child's card, and when you record a payment for one child the method is filled in for you.
6. **Mute one child** with the *Mute* button on the child's card: only that child's auto-debits pause, and the parent's other children carry on. See **Muting** below.

Tip: a client that pays one combined amount can have **one auto-debit** instead of one per child.

Leavers: Left — owing and Left — settled

When a client leaves, move them to **Left — owing** or **History** (drag them onto the chip, or **Change status ▼** on their page). When one child of several leaves, press **One child left...** on the client's page:

- **Left — owing:** they still owe money, so they **stay in every list**, follow-up and the owing views, with a badge such as *Left — owing £450*. Auto-debits carry on only **until the year ends** (the last Sunday before the next year starts, see *School year* below) and then stop by themselves. When the balance reaches £0, a follow-up asks whether to move them to *Left — settled* (and the parent's page shows a **Move to Left — settled** button).
- **Left — settled:** nothing is owed. Auto-debits **stop straight away**, no reminders go out, and once all the children have left they move to **History** (Parents › Filters › Status › *History (left — settled)*). The balance should be £0; if it isn't, you are asked to confirm. Their record, history and balance stay.
- **Revive / re-enrol:** for a client in History that comes back (for example with a new son). They return to the active lists. Auto-debits don't restart by themselves: add the child or set the weekly amount, then set up the auto-debit.

On Parents, the status chips (Active, Enrolled, Muted, Left — owing, History) show each group, and you can drag clients between them (see below).

Moving clients between statuses

Every client is in one of four statuses: **Enrolled**, **Muted** (enrolled but paused: no auto-debits or reminders), **Left — owing** and **History** (left, nothing owing).

- **Drag and drop:** on Parents, drag a client's row onto a status chip, like moving an email to a folder. Select several first and drag one of them to move them all.
- **Without dragging:** select clients and press **Move to ▼** on the bar at the bottom, or press **Change status ▼** on the client's page or in the side panel.
- **Every move asks when and why:** the date, a reason (choose one or write your own; it's required) and notes. They're kept in **Status history** on the client's History tab, and the latest one shows at the top of the client's page.
- **History needs a £0 balance.** If a client still owes (or is in credit), you're offered **Left — owing** instead, or you can move them anyway.

- **Out of History** (revive): move them back to Enrolled or Muted. Auto-debits that were stopped don't restart by themselves: set up the auto-debit again on the client's page.
- **Mute** is one button: press it to mute (it stays pressed and grey), press it again to unmute. Both ask the short when-and-why question.
- **One child left**: on the client's page, **One child left...** marks just that child.

Charges and the weekly run

What it's for: regular charges add themselves, so balances are always current.

1. **Auto-debits** start from the date you set and repeat **weekly, monthly or termly** (term dates are in Settings > Billing).
2. A past start date adds the missed weeks immediately. A future date charges nothing until then.
3. The run happens every charge day early in the morning, and whenever the app is opened. It is safe to repeat and never double-charges.
4. **One-off charges** (e.g. Bedek Habayis): open a parent > Add charge, or use *Add a charge to everyone* (Tools), or select several on the Parents page > Add charge.
5. **Weekly debits** shows each run and what it added.

Live demo with made-up families. Try anything: it resets every day.
Reset demo
Other demo
Exit demo

Your mosed (demo)
Home
Parents
To do
Follow-ups
Payments
Texts
Labels
Import
Weekly debits
Tools
Settings
Help
עברית

Weekly auto-debits
?
Run now (safe to repeat)

Debits are added every Sunday early morning (London time), and also whenever the app opens, so a missed week is caught up. Each setup is charged once per week, never twice; a deleted auto-debit is never re-created.

By week
10 rows

Week	פרשה	Debits	Total	
18 Oct 26	לך-לך פ"ז	18	£2,075.00	List
11 Oct 26	נח פ"ז	18	£2,075.00	List
4 Oct 26	בראשית פ"ז	18	£2,015.00	List
27 Sep 26	שמיני עצרת פ"ז	18	£2,075.00	List
20 Sep 26	סוכות א' פ"ז	18	£2,075.00	List
13 Sep 26	האזינו פ"ז	17	£1,955.00	List
6 Sep 26	ראש השנה פ"ז	18	£2,075.00	List
30 Aug 26	נעבים-וילך פ"ו	2	£240.00	List
23 Aug 26	כיתבוא פ"ו	1	£120.00	List
16 Aug 26	כיתצא פ"ו	1	£120.00	List

Runs
No runs yet.

Muting: you can mute **one child** (the *Mute* button on the child's card) or **all the children** (*Mute* at the top of the parent's page). Mute when you want to keep the record but stop charging, for example when a child has left or the client has paid in full. Muting works **straight away**: no auto-debit dated from that day on is added for that child (or, for a client, for any child and any auto-debit for all the children). The other children of a

partly muted client carry on as before. Muting the whole client mutes all its children and also leaves the client out of the scheduled reminder texts; when every child is muted, the client counts as muted too. A muted child or client shows the badge **Muted — auto-debits paused**, and a partly muted client shows e.g. **1 of 2 children muted** in the lists. The record, history and balance stay as they are, and search still finds them. When you unmute, auto-debits restart from that day, and you choose whether the muted weeks are charged (they are not, unless you tick the box).

The weekly auto-debit (Settings › Billing)

On each **charge day** (Sunday for most mosdos) the auto-debit adds **the coming week's charge** for every child, at that **child's own amount**. Muted children and clients are skipped, and a week already charged by your old program (from the history import) is never charged again.

- **Auto-debits are on:** the main switch. While it is off, nothing is charged automatically, and you see **OFF: nothing is charged automatically**. When you switch it on, charging starts from the **First charge date**, and earlier weeks are never back-charged.
- **Charge day** and **How often** (weekly for the coming week, or monthly).
- **Starting mid-week:** *Charge the whole week, Start from the next charge day, or Whole week if they start by...* a day you choose (e.g. Tuesday). A child's **enrolment date stays separate** from their first charge: enrolled Thursday 14 Aug with *Start from the next charge day* means the first charge is Sunday 16 Aug. Each auto-debit on the parent's page shows "first charge Sun 16 Aug".
- **Set up from each child's amount...** makes one auto-debit per child at the child's own weekly amount (or one for the client when its weekly amount isn't split between the children yet). It shows the list, the weekly total and the first charge date before anything is saved. Children who are muted, have left or have no amount are skipped.

Year start and yearly charges (Settings › Billing)

- **Your year start is a setting.** For example, a mosed whose year starts on 1 Elul: billing starts on the **Sunday nearest it**: 1 Elul on Monday to Wednesday means the Sunday before, Thursday to Saturday the Sunday after (5786: 1 Elul was Friday 14 Aug 2026, so billing started Sunday 16 Aug). Settings › Billing shows both dates for this year and next, and you can enter a different start Sunday for a year. *Left — owing* auto-debits stop after the last Sunday before the next year starts.
- **Every weekly charge is on a Sunday**, whatever day a child enrolled: a child enrolled on Friday 14 Aug is charged Sunday 16 Aug, 23 Aug and so on.
- **Add the yearly Bedek Habayis charge:** when ticked, from **next year** every enrolled child (all grades) gets one charge (e.g. *Bedek Habayis 2027*, £200 by default) on the first Sunday of the year. Leavers and muted children are skipped, and no child is charged twice for the same year. A child who joins later in the year isn't charged automatically: add it by hand if needed.
- It is **never added for this year or a past year** (no back-dating): the weekly run adds it on the first Sunday of the next year. **Preview next year's charge...** shows the date, the children who would be charged today and the total.

Monthly charge days, yearly and one-off charges, and the yearly grade-up

- **Monthly auto-debits** (Settings › Billing › Monthly auto-debits are charged on): the first charge day of the month (as before), **a date of the month** (1 to 28, or the last day), or **a Hebrew date** (Rosh Chodesh or another day of the Hebrew month). The next dates show in both calendars. A change applies to the coming months only.
- **Yearly and one-off charges** (Settings › Billing): Bedek Habayis is now one of these, and you can add others (a building fund, a trip). Each has a name, an amount per child, when (the start of each school year, a date every year, or once), and which grades (none ticked = all). **Preview** shows who it would be added for. When it's on, it's added by itself in the two weeks from its date, never for a date before you switched it on.
- **Yearly grade-up** (Tools): choose where each grade goes (the next grade, another grade, leaves, or stays) and how many weeks before the date to remind you. A **Yearly grade-up** follow-up appears then, and **nothing moves until you confirm** on the Tools page.

Payments and direct debits

What it's for: recording money in (payments, standing orders, direct debits, refunds).

Live demo with made-up families. Try anything: it resets every day. [Reset demo](#) [Other demo](#) [Exit demo](#)

[Your mosed \(demo\)](#) [Home](#) [Parents](#) [To do](#) [Follow-ups](#) **[Payments](#)** [Texts](#) [Labels](#) [Import](#) [Weekly debits](#) [Tools](#) [Settings](#) [Help](#) עברית

Payments ? Last payment per parent

From To ☐ Hide standing orders

Total £9,980.00

18 rows

Date	Parent	Type	Amount	Method	Description
21 Oct 26	Demo Cohen	Payment	£145.00	SY bank	MENDY
21 Oct 26	Demo Sample	Payment	£300.00	SY bank	283 SCHOOL FEES
15 Oct 26	Demo Sample	Payment	£250.00	Cash	Payment – thank you
7 Oct 26	Demo Sample	Correction	£30.00		Correction – charged twice in error
2 Oct 26	Eliezer Neuman	Payment	£420.00	Standing order	Payment – thank you
2 Oct 26	Zev Mandel	Payment	£630.00	Standing order	Payment – thank you
2 Oct 26	Yoel Katz	Payment	£1,080.00	Cash	Payment – thank you
2 Oct 26	Mordche Hirsch	Payment	£1,155.00	Bank transfer	Payment – thank you
2 Oct 26	Boruch Gutman	Payment	£700.00	Cash	Payment – thank you
2 Oct 26	Shmuel Frankel	Payment	£420.00	Bank transfer	Payment – thank you
2 Oct 26	Eisen	Payment	£805.00	Bank transfer	Payment – thank you
2 Oct 26	Yehuda Dresner	Payment	£1,080.00	Bank transfer	Payment – thank you
2 Oct 26	Dovid Birnbaum	Payment	£770.00	Bank transfer	Payment – thank you
2 Oct 26	Avrohom Adelman	Payment	£805.00	Bank transfer	Payment – thank you

1. **One payment:** open the parent › *Add payment*, or use Payments › Add payment. Enter the amount, date, method and description.
2. **Bank files:** Payments › Payments & bank files › upload a CSV or Excel file. Nothing is recorded straight away: the rows go to the **Review queue** first (see below). Match each row to a parent once and it's

remembered next time.

3. **Standing orders / DD:** record them as their own type so you can see them separately (and exclude them from "last payment" if you like).
4. **Mistakes:** edit or delete any transaction. Deleted items can be restored, and every change is in the change log.

Paid into: where the money lands

What it's for: knowing which account each payment went into (your bank, a voucher or charity account, an online platform...), and a report of where all the money went.

The screenshot shows the 'Settings - Your mosed (demo)' interface. The top navigation bar includes links for Home, Overview, Parents, Follow-ups, Payments, Statements, Messages, Labels, Import, Weekly debits, Tools, Plan, Settings (highlighted), and Help. Below the navigation bar, the 'Settings' section is titled 'Settings - Your mosed (demo)' and has sub-tabs: Your mosed, Billing, Payments in (selected), General, Statement layout, Parsha, Texts, and Columns. The 'Payments in' sub-tab is active, showing the 'Receiving accounts' section. This section explains that 'Paid into' is used to specify where money lands (bank, voucher, charity, or online platform) and that it can be changed for new payments. It contains a table with columns: Account, Type, Details, Methods that land here, In use status, and a Remove button. Three accounts are listed: 'Main bank account' (Bank account, Barclays ...4417, Standing order, Bank transfer, Direct debit), 'Charity voucher account' (Voucher / charity account, e.g. Lloyds ...5678 (optional), Achisomoch, Tevini, Vouchers), and 'Online giving page' (Online platform, e.g. Lloyds ...5678 (optional), Card, Online). All three are marked 'In use'. There are 'Add an account' and 'Save accounts' buttons. Below this is the 'Card payments' section, which is currently 'Not active' and prompts the user to 'connect Stripe to switch on'. It provides instructions on how to connect Stripe and save cards, and includes a 'Connect Stripe' button. There are also checkboxes for 'Card payments on' and 'Charge saved cards on their schedule'.

Account	Type	Details	Methods that land here	In use	Remove
Main bank account	Bank account	Barclays ...4417	Standing order, Bank transfer, Direct debit	☒	Remove
Charity voucher account	Voucher / charity account	e.g. Lloyds ...5678 (optional)	Achisomoch, Tevini, Vouchers	☒	Remove
Online giving page	Online platform	e.g. Lloyds ...5678 (optional)	Card, Online	☒	Remove

1. **Settings > Payments in > Receiving accounts:** add each account where money arrives: a name, the type, optional details (e.g. the last 4 digits) and the **methods that land here** (e.g. *Standing order, Bank transfer*). Untick *In use* for an old account; payments already recorded keep it.
2. **On each payment:** *Paid into* sits next to the method. It fills in by itself from the method (you can change it). Bulk add, standing orders and recurring pledges have it too.
3. **Payments page:** filter by *Paid into*, tick several payments and use **Set "Paid into"** to fill in older ones.
4. **Overview > By account:** the total and number of payments per account for any dates, with **CSV** (every payment, by account) and **PDF** (a summary, then each account's payments). Payments with nothing set show as *Not recorded*.

By account where the money went

From 08/16/2026 To 10/23/2026 CSV PDF

4 rows

#	Paid into	Payments	Total	Share
1	Main bank account Barclays ...4417	75	£20,810.00	71%
2	Charity voucher account	9	£4,320.00	15%
3	Online giving page	6	£3,005.00	10%
4	Not recorded	4	£1,115.00	4%
Total		94	£29,250.00	

"Not recorded" = payments with no "Paid into". Set it on the payment, or tick several on Payments and use "Set Paid into".

Card payments (not active yet)

Card payments are built in but **switched off**: they show *Not active – connect Stripe to switch on*. When switched on, each organisation connects **its own Stripe account** (*Settings › Payments in › Connect Stripe*), so the money goes straight to you. On a client: **Save a card** (the card is typed on Stripe's secure page, never in Billing for Mosdos), then **Charge card** when needed, or **Charge on a schedule** (weekly or monthly, a fixed amount or the balance owed). Each charge is recorded as a payment with method *Card*, paid into the account you choose, once Stripe confirms it; a card that fails becomes a follow-up. Plans: Standard and Pro.

Checking an import

Your mosed (demo) Home Parents To do Follow-ups Payments Texts Labels **Import** Weekly debits Tools Settings Help עברית

This upload

Show all waiting recorded so far 0 - ignored 0

2 New 1 Matched 1 To review 3 Possible duplicates 2 Already recorded 0 Ignored 0 Already imported

Ticked rows are recorded when you press **Record ticked**. Rows without a parent are never recorded. Rows that match a payment already in the system are never ticked for you: **Already recorded** rows are skipped unless you press **Add anyway**, and **Possible duplicates** wait for you to choose.

All Matched To review Possible duplicates Already recorded

7 rows

☐	Date	Amount	Payer / reference	Parent	Child	Description on statement
☐	02/10/2026	£1,155.00 SY bank	M HIRSCH 1007 TUITION	Mordche Hirsch #1007	Whole family	1007 TUITION
			Already recorded on 2 Oct 2026 Not added again. Linked to that payment.			Add anyway
☐	02/10/2026	£1,080.00 SY bank	YEHUDA DRESNER 1003 TUITION	Yehuda Dresner #1003	Mendy	1003 TUITION
			Already recorded on 2 Oct 2026 Not added again. Linked to that payment.			Add anyway
☐	02/10/2026	£450.00 SY bank	SHMUEL FRANKEL 1005 FEES	Shmuel Frankel #1005	Yossi	1005 FEES
			Possible duplicate of the payment on 2 Oct 2026 (£420.00) same family and day, different amount			Add anyway Skip (link to it) Change family
☐	02/10/2026	£1,080.00 SY bank	YEHUDA DRESNER 1003 TUITION	Yehuda Dresner #1003	Mendy	1003 TUITION

Every row in the file is checked against the payments already in the system (typed in by hand or imported before). The tiles at the top count each outcome, and the buttons above the table show one kind at a time.

- **Matched (new):** a sure match to one client, and nothing like it is recorded yet. Ticked for you: press **Record ticked**.
- **To review:** the client isn't certain. Choose the parent (or tap a suggestion), then tick the row. The **payer** comes first: the name (or, if there is none, the reference) on the bank line, because a company or a charity can pay for a client.
- **Possible duplicate:** something close is already recorded: the same payer and amount up to 3 days apart, or the same payer and day with a different amount. For older payments recorded without a payer, the client is used instead: the same client and amount up to 3 days apart, the same client and day with a different amount, or the same amount and day for a different or uncertain client. It says "Possible duplicate of the payment on (date) (£ amount)". Choose **Add anyway, Skip (link to it)** if it is that same payment, or **Change client**. Never ticked for you.
- **Already recorded:** the same payer, amount and date is already in the system, whichever client it is on (for older payments without a payer: the same client, amount and date). It is not added again, and it is linked to that payment. If you are sure it is a second payment, press **Add anyway**.

Two **different payers** paying the same amount on the same day are never duplicates, even for the same client. Every payment recorded from an import keeps its payer, so later imports can check it.

Previous payments from this payer: when the payer has paid before, the row shows their last 3 payments (client, date, amount), and that client is suggested. This helps with company payments that have no clear reference.

Also counted: **Ignored** (no date or amount, or money going out) and **Already imported** (rows from a file you uploaded before). One recorded payment can only match one row: if the file has the same payment twice and the system has it once, one row is *Already recorded* and the other goes to review.

Row counts: every table and list shows how many rows it has, just above it: "7 rows", or "Showing 3 of 7" when a filter, search, view or tab hides some.

History from the old program

When you bring over the full history (charges and payments) from the program you used before:

1. Payments > Payments & bank files > choose the **Payment history** source and the file, and tick **History from the old program**.
 2. **Move weekly charges to the Sunday of their week** is ticked for you (the day is your charge day in Settings). Same amounts, new dates: a Thursday, Friday or Saturday charge moves forward to the Sunday, a Monday, Tuesday or Wednesday charge back to the Sunday before (or choose *always back*). Each moved row shows "moved from Thu 20 Aug", and statements follow the new dates.
 3. Press **Match rows**, then choose the client for any row that has none.
 4. **Reconcile with the exported balances:** for each client, the history (charges minus payments, up to the day the balances were exported) is compared with the balance brought over from the old program.
- **Match:** press **Record the matching clients**. The history replaces the opening balance, and the balance stays exactly the same.
 - **Don't match:** nothing is recorded for that client until you choose: keep the exported balance (a "difference" line is added), use the history's total (the balance changes), or don't import that client's

history. *Why it may be* points out a difference of exactly one week's charge.

- Entries dated after the export are added on top. **Download the list** gives the whole report as a CSV, and every step is in the change log.
- **Notes from the old program** are kept: the statement shows a short, tidy line (e.g. *AHT, Cheque, Correction: 4 weeks*), and on the parent's page the original note is shown word for word in small grey text under that line.

Payer types

Parents › *Payer types*. Every child is one of three types (a child takes the client's type unless it has its own):

- **Standing order:** pays by standing order. Each expected payment is checked; if it doesn't arrive, a *Standing-order check* appears on Follow-ups to allocate or chase.
- **Reliable manual:** pays on time, by hand. If a week passes with no payment, a gentle nudge appears on Follow-ups (at most once a week).
- **Chase:** needs chasing. While the client owes, *Chase: owes money* stays on Follow-ups.

The app suggests a type from each client's payments (for example "same £95 about every 7 days" → standing order). Suggestions are only suggestions: nothing happens until you confirm them, one by one or with *Confirm the suggestions shown*.

Statements

What it's for: a clear statement of account for any period, with your logo, Hebrew dates and parsha names.

Live demo with made-up families. Try anything: it resets every day. [Reset demo](#) [Other demo](#) [Exit demo](#)

Your mosed (demo) Home Parents To do Follow-ups Payments Texts Labels Import Weekly debits Tools Settings Help עברית

Statement · Demo Sample ?

From 01/09/2026 To 22/10/2026 Weeks in advance 3 Children All (combined) Update

School year Last 3 months Everything Download PDF Print Share link

Earlier entries are added up into "Balance brought forward". Blank cells are left empty, never £0.00.

Mr & Mrs Demo Sample משפחת דוגמה (דמו)

1 Demo Road, London N16 0AA

Your mosed name - registered charity no. 000000 - 1 Example Street, London N16 0AA

Date: 22-Oct-2026

לך-יד פ"ז Account 283

Statement

1-Sep-2026 to 22-Oct-2026 - including 3 weeks in advance (to 12-Nov-2026)

מסד סיפור	Class	Enrolled	Pupil	Fee	Disc
ר' יוסף	Grade 3	1-Sep-25	Shmuel	£145.00	£25.00
ר' משה	Grade 1	13-Aug-26	Chaim Yakov	£120.00	

Date	פרשה	Description	Debit	Credit	Balance
1-Sep-26		Balance brought forward			-£180.00
1-Sep-26	נצבים-וילך פ"ו	Standing order		£300.00	£120.00
6-Sep-26	ראש השנה פ"ז	Fees - Chaim Yakov	£120.00		
6-Sep-26	ראש השנה פ"ז	Fees - Shmuel	£120.00		-£120.00
13-Sep-26	האזינו פ"ז	Fees - Shmuel	£120.00		-£240.00
14-Sep-26	האזינו פ"ז	Pledge - Sivum	£100.00		-£340.00

1. Open a parent > **Statement**. Choose the period (earlier entries are added up into "Balance brought forward").
2. **Download PDF**, **Print**, or create a **Share link** to send by WhatsApp or text.
3. Settings > Statement layout sets the heading, date and parsha columns, and small print. Settings > Your mosed sets the name, address, messages and bank details.

Tip: the message at the bottom changes automatically when someone owes, is paid up, or is in credit.

Hebrew dates: every date on statements, the ledger, the weekly runs and Home also shows the **Hebrew date** (e.g. ג' אלול) beside the parsha. Parsha names are worked out from the Hebrew calendar for any year (outside Eretz Yisroel: double parshiyos and yom tov weeks included), so no sheet is needed; you can still upload your own sheet in Settings > Parsha to change the wording of particular weeks. Hebrew dates come from the built-in Hebrew calendar. Turn either off in Settings > Billing > Statement labels.

One child only: choose a child at the top of the statement (or on the client page). You see that child's own charges and payments, plus the client lines that can't be put on one child, marked *All children* or *All children (old program)* (the old program charged the client as a whole, not each child). On the client's full statement, each child's charge shows the child's name. **School year** runs from the start of your billing year (for a mosed: 1 Elul, billed from the nearest Sunday). The Hebrew date column is off; switch *Show the Hebrew date* on in Settings > Statement if you want it back.

Statements in bulk

What it's for: every client's statement at once, e.g. at the end of a term, for the accountant, or to print and hand out. Nothing is sent from here.

1. Open **Statements** (top menu).
2. **Period:** *School year* (from the start of your year to today), *Last ... weeks*, or *From – to* dates. Earlier entries are added up into "Balance brought forward", as on a single statement.
3. **Clients:** the same status chips as Parents (*Active*, *Enrolled*, *Muted*, *Left – owing*, *History*, combine them), and *Only clients who owe money* if you like. **Choose clients...** lets you tick exactly which ones.
4. **Download:** *One statement per client*, or *Per child too* (a client with several children also gets one statement for each child). Then **One PDF** (every client starts on a new page) or a **ZIP of separate PDFs**, one file per client, named with the client's name, ref and date.

About 70 clients take under half a minute. Your choices are remembered for next time.

Follow-ups

What it's for: one page for everything you need to chase or fix: promises, standing orders to check, missed payments, calls, statements to send and details to correct. Follow-ups and To do are now one list.

Follow-ups ?

Add follow-up

This week's nudge

week from Sunday 18 Oct 26

Texts to send 8

Families who owe and have a mobile.

Open Messages

Call: owing £300+ 8

Mr Mordche Hirsch £1,355.00 call

Mr Pinchas Lieber £840.00 call

Mr & Mrs Avrohom Adelman £8...

Mrs Eisen £805.00 call

Mr & Mrs Demo Sample £600.0...

Mr Demo Cohen £580.00 call

Mr Eliezer Neuman £420.00 call

Mr Shmuel Frankel £420.00 call

Statements / emails 0

None this week.

Promises due 2

Mr Pinchas Lieber 23 Oct 26

Mr & Mrs Demo Sample 23 Oct 26

Missed payments 0

None this week.

Search follow-ups or parents...

Open

All 9

Promise 2

Standing-order check 0

Missed payment 0

Call (high balance) 0

Send statement / email 0

Fix info 4

Other 3

9 rows

Promise

Called. Promised £400 by Friday, rest next month.

Mr Pinchas Lieber · 07700 900150

due Fri 23 Oct 26 · £400.00 · added 22 Oct 26

Edit

Add note

Snooze

Done

Promise

Called. Promised £400 by Friday.

Mr & Mrs Demo Sample · 07000 000000

due Fri 23 Oct 26 · £400.00 · paid since £300.00 · added 22 Oct 26

Edit

Add note

Snooze

Done

Fix info

Street address missing

Edit

Add note

Snooze

Done

- **Categories:** *Promise*, *Standing-order check*, *Missed payment*, *Call (high balance)*, *Send statement / email*, *Fix info* and *Other*. Tap a category to see only those items.
- **Each item** has **Edit** (title, category, date, amount, details), **Add note**, **Snooze** (+1 day, +1 week, or pick a date) and **Done**. The same list and buttons are at the top of each parent's page.
- **Automatic items** appear by themselves (a weekly amount to split, a missing street or child name, no valid mobile) and close themselves when fixed.
- **Standing orders:** on a parent's *Children & auto-debits* tab, add each standing order with its amount and expected day (weekly or monthly). Nothing is ever recorded for you. If no payment of that amount is recorded within 2 days of the expected day, a **Standing-order check** appears. It closes itself once the payment is recorded.
- **This week's nudge** (top of the page, from your nudge day, Sunday): texts to send, clients owing more than your *Who to call* amount (Settings > General), statements for clients who prefer email (set on the parent) or asked for one, promises due this week, and missed payments.
- Done items are hidden but kept: choose *Done* or *All* to see them.

Reports and exports

What it's for: getting your data out, for Excel, your accountant or a backup.

- **Parents page:** *CSV* or *Excel* exports the current view, with its columns and filters. Use **Export** in the bulk bar to export only the rows you selected.
- **Tools:** full lists as CSV, the change log, a full backup (JSON), and *Add a charge to everyone*.

- **Home:** totals owed, this week's auto-debits, the top balances and recent payments.

Live demo with made-up families. Try anything: it resets every day.

Reset demo

Other demo

Exit demo

Your mosed (demo)

Home

Parents

To do

Follow-ups

Payments

Texts

Labels

Import

Weekly debits

Tools

Settings

Help

עברית

Tools ?

Yearly rollover (September)

Moves each ticked child up one grade (Grade 1 → Grade 2 → Grade 3 → Out). Children who leave have their auto-debit ended. Children with automatic progression also move up on their own date; this is for doing it all at once.

Rollover date

22/10/2026

19 rows

	Child	Parent	Now	Becomes
☒	Moishe	Avrohom Adelman	Grade 1	Grade 2
☒	Yitzchok	Avrohom Adelman	Grade 3	Out
☒	Ari	Boruch Gutman	Grade 1	Grade 2
☒	Yanky	Chaim Perlman	Grade 1	Grade 2
☒	Mendy	Demo Cohen	Grade 2	Grade 3

Move ticked children up

Add a charge to everyone

For example the yearly £200 Bedek Habayis, for all active parents.

Description

Bedek Habayis

Amount £

200

Statement date

22/10/2026

Type

Charge

Add to all active parents

Export everything

Full lists as CSV (open in Excel).

Parents

Children

Transactions

Auto-debits

Change log

Full backup (JSON)

Email statements

Change log

Address labels

What it's for: printing address labels on standard sticky-label sheets.

Live demo with made-up families. Try anything: it resets every day. [Reset demo](#) [Other demo](#) [Exit demo](#)

Your mosed (demo) Home Parents To do Follow-ups Payments Texts **Labels** Import Weekly debits Tools Settings Help עברית

Address labels ?

Print at 100% ("Actual size"). Turn off "Fit to page" in the print dialog, or the labels won't line up.

Label sheet
Sheet
Avery L4737 · 27 per sheet (63.5 × 29.6 mm)

Start at label no.
1
To reuse a part-used sheet

☐ Draw outlines (test print)

Text
Name
Full name (Mr Yoel Katz)

Font
Sans

Size pt
10

☐ Add the children's names

Who
Parents
All active parents

13 labels · 1 skipped (no address)

[Download labels PDF](#)

14 rows

Mr & Mrs Avrohom Adelman
12 Maple Road, London, N16 5AA

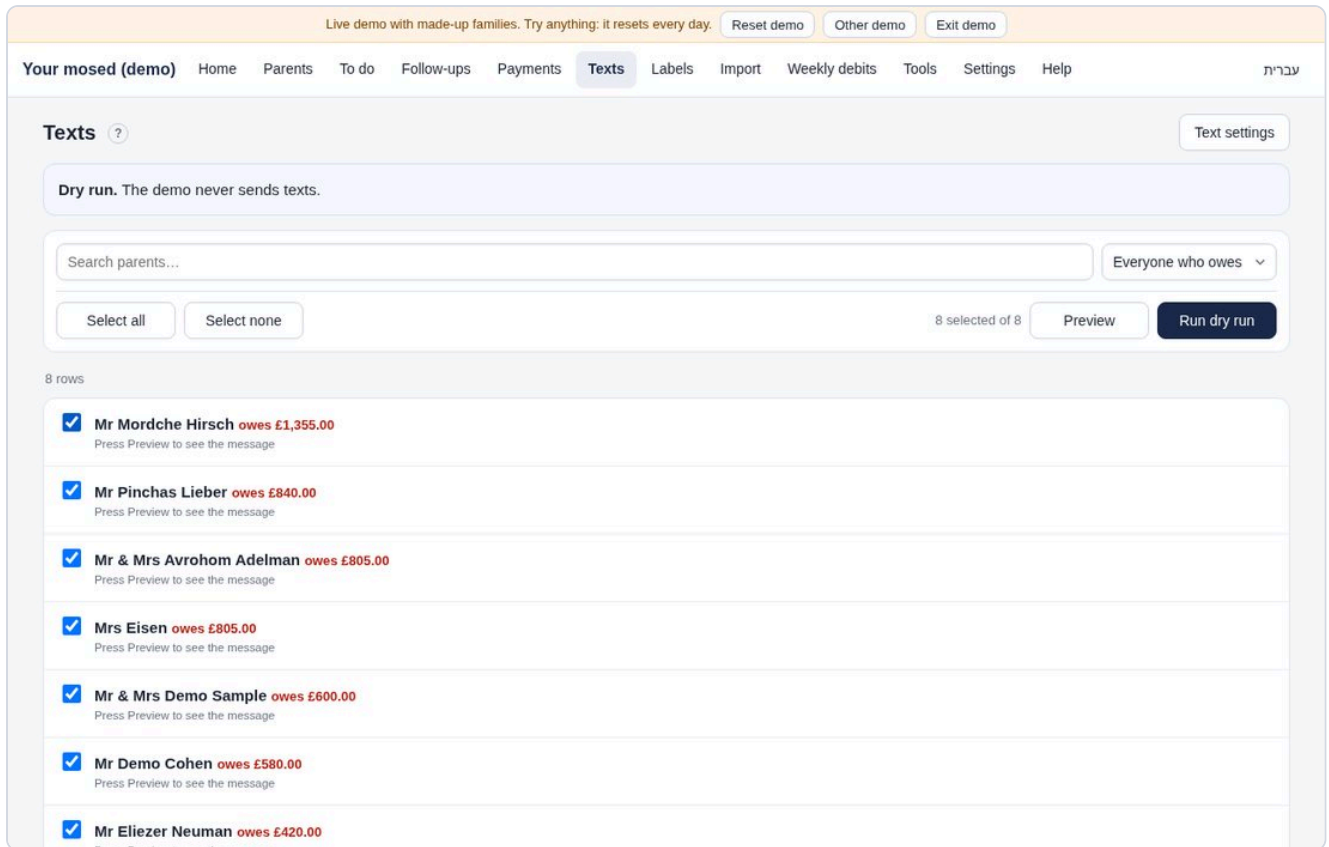
1. Open **Labels**. Choose the sheet: **Avery L4737** (27 per sheet, the default), L7160, L7161, L7163, L7651, or a custom size.
2. Choose the name format (full name, Mr & Mrs + surname, title + surname, surname only, or custom), the font and size, and whether to add the children's names.
3. Choose who: all active, everyone who owes, everyone, or tick them yourself. You can also select parents on the Parents page and press *Labels*.
4. Using a part-used sheet? Set **Start at label no.**
5. Press **Download labels PDF**. Print at **100% / Actual size**, with *Fit to page* turned off.

Tip: do a test print on plain paper with *Draw outlines* switched on, and hold it against a label sheet.

Messages: texts and emails

One page for texts and emails. *Messages* (it used to be *Texts*) has two tabs: **Texts** for balance texts, and **Emails** for statements by email to the clients you choose (for example everyone who prefers email). Each email is previewed with its statement before you press Send. The log underneath shows texts and emails together, newest first. Nothing is sent until a key is set up and switched on (Settings > Texts / Email): until then every send is logged as a **dry run**, and the status line at the top says so.

What it's for: sending balance reminders by text, with a preview of every message first.



1. **Settings** > **Texts**: choose the provider (Twilio), and enter the Account SID, the sender (a name of up to 11 letters, or your number) and the auth token. The token is stored encrypted and never shown again.
2. Write the two messages: one for people who owe, and one for people who are paid up or in credit (or choose *Don't send* for them). Placeholders: {parent_name} {balance} {children} {mosed_name} {pay_info}.
3. Open **Texts**, choose who gets one, and press **Preview** to see every message. Then press **Send now**.
4. People with no valid UK mobile are skipped and listed in To do. People marked **opted out (STOP)** are always skipped.
5. A weekly **schedule** is available but **off** by default.

Without a key, everything is a dry run: you can preview and log, but nothing is sent. The demo never sends texts.

Live demo with made-up families. Try anything: it resets every day.

Reset demoOther demoExit demo

Your mosed (demo)

HomeParentsTo doFollow-upsPaymentsTextsLabelsImportWeekly debitsToolsSettingsHelp

Settings · Your mosed (demo)

Your mosedBillingGeneralStatement layoutParsha sheet

Texts

Provider

The demo never sends texts

Provider

Account SID

Sender

Auth token

Twilio

Sender ID (max 11 letters, e.g. ShareiYosh) or your number

paste the token

Stored encrypted; never shown again

Messages

{parent_name} {balance} {children} {mosed_name} {pay_info}

When money is owed

When paid up or in credit

Dear {parent_name}, your balance with {mosed_name} is {balance}. Please pay at your earliest convenience. {pay_info}

Dear {parent_name}, thank you. Your account with {mosed_name} is {balance_word}.

{balance_word} = "fully paid up" or "in credit by £..."

{pay_info}

e.g. bank details or a payment link

Weekly schedule

Off by default

Day

From (time)

☐ Send automatically every week

Sunday

10:00

Sent at the first check after this time

Pledges (shuls)

What it's for: aliyos, kibbudim, nedarim, appeals, seats and plaques. They go onto the balance and statements like any charge.

Live demo with made-up households. Try anything: it resets every day. [Reset demo](#) [Other demo](#) [Exit demo](#)

Your shul (demo) Home Members To do Follow-ups Payments **Pledges** Texts Labels Import Weekly debits Tools Settings Help עברית

Pledges ?

Quick entry Type, press Enter, next one. Each pledge is added to the balance and the statement.

Member Category

Amount £ Occasion

Date Notes

6 5787 בתשרי

☐ Paid now Method

[Add pledge](#)

Unpaid pledges

Total unpaid: £4,154.00

10 rows

Date	Member	Category	Occasion	Amount	Status	
10 Oct 26 29 5787 בתשרי	Mrs Freidel Black	Neder	Refuah shleimah	£54.00	Unpaid	Mark paid

1. Turn on **Use pledges** in Settings › Your mosed (it is on automatically for shuls). Edit the categories if you like.
2. Open **Pledges**. In *Quick entry*, type a name, pick a category, and enter the amount and occasion (e.g. "שבת בראשית – שישי"). Press **Enter**, and the form is ready for the next one, so a gabbai can enter Shabbos's pledges in a couple of minutes.
3. Tick **Paid now** if it was paid on the spot. Otherwise press **Mark paid** later (this records the payment).
4. Filter by unpaid, paid or category. The Hebrew date shows beside each date.

Settings and "Your mosed"

Live demo with made-up families. Try anything: it resets every day. [Reset demo](#) [Other demo](#) [Exit demo](#)

Your mosed (demo) Home Parents To do Follow-ups Payments Texts Labels Import Weekly debits Tools **Settings** Help עברית

Settings · Your mosed (demo) ?

Your mosed Billing General Statement layout Parsha sheet Texts

Your logo

Logo
PNG or JPEG under 500 KB. Shown at the top of the site and on statements.

Upload...

Organisation

Name

Your mosed (demo)

Hebrew / Yiddish name

Name line on statements

Your mosed name · registered charity no. 000000

Contact

020 0000 0000 · office@your-mosed.org

Printed under the logo, e.g. the full legal name

Phone, email or website

Address

1 Example Street, London N16 0AA

Statement messages {balance} = the amount

When money is owed

Balance due: {balance}. Please arrange payment at your earliest convenience. THANK YOU.

When paid up

Your account is up to date and the statement is for your information only. THANK YOU.

When in credit

Your account is in credit by {balance}. THANK YOU.

Bank details for payment

Bank: Example Bank · Sort code 00-00-00 · Account 00000000 · Reference: your account number

- **Your mosed:** name, Hebrew name, logo, address, contact, statement messages and bank details. Also the **organisation type** (School / Shul / Other), the **words used on screen** (e.g. "Member" instead of "Parent"), and pledges.
- **Billing:** charge types (amount, weekly/monthly/termly, per child or per client), charge day, term dates, sibling discount, and the parsha and date columns.
- **General:** mid-week starts, grades and the yearly grade-up, auto-mute when paid, "who to call" rules, and payment methods.
- **Statement layout, Parsha, Texts, Email** (email is off until set up), **Users, API tokens, Columns** (your Parents table layout), **My login**.

Live demo with made-up families. Try anything: it resets every day. [Reset demo](#) [Other demo](#) [Exit demo](#)

Your mosed (demo) Home Parents To do Follow-ups Payments Texts Labels Import Weekly debits Tools **Settings** Help עברית

Settings · Your mosed (demo) ?

Your mosed **Billing** General Statement layout Parsha sheet Texts

What you bill These appear as presets when you set up an auto-debit

Charge	Amount £	How often	Per	
Tuition	120	Weekly	Per child	Remove
Lunch	15	Weekly	Per child	Remove
Bus	60	Monthly	Per family	Remove
Registration	150	Termly	Per family	Remove
Add a charge type				

When charges land

Charge day: Default frequency: Term start dates:
For termly charges, comma separated

Sibling discount Pre-filled when you set up a charge for a 2nd or 3rd+ child

2nd child: 3rd child and more: Discount is in:

Statement labels

Setting up a new organisation

Settings › *Setup* is a checklist for a new organisation. Each step shows **Done** or **To do**; open it to fill it in, or follow its button to the full settings tab.

Home Overview Parents Follow-ups Payments Statements Messages Labels Import Weekly debits Tools Plan **Settings** Help

Settings · Your mosed (demo)

Setup Your mosed Billing Payments in Your process General Statement layout Parsha Texts Columns

Set up Your mosed (demo) 7 of 8 done

Everything here can be changed later. Open a step to fill it in.

- Name and logo** To do



Logo
PNG or JPEG under 500 KB. Shown at the top of the site and on statements.

[Upload...](#)

Name:

Contact (phone, email or website):

Address:

[Save](#) [More \(Hebrew name, statement messages, bank details\)](#)
- Type of organisation and the words used** Done
- Charges** Done
- Year start and moving up** Done
- Where the money lands** Done

1. **Name and logo:** the logo is used at the top of the site and on statements and PDFs.

2. **Type of organisation and the words used** (Parents/Children, Members/Family members...).
3. **Charges:** the standard amount, how often, the charge day and the first charge date. Each client can still have their own amount and frequency (weekly, monthly, termly or yearly) on their page.
4. **Year start and moving up:** when the year starts (1 Elul, or your own date) and whether children move up together on one date or each on their own anniversary.
5. **Where the money lands** (receiving accounts), **Statements**, **Describe your process** and **Import your clients**.

Your process

Settings › *Your process* is a box to describe how you bill, in your own words: what you charge, how often, when the year starts and restarts, discounts, breaks, how families pay. It's saved for your organisation and only your team sees it. **Suggest settings** is built but not switched on yet: when it is, it will read your description and propose settings as a list you tick and apply. Nothing changes until you do.

The screenshot shows the 'Settings - Your mosed (demo)' interface. The top navigation bar includes links for Home, Overview, Parents, Follow-ups, Payments, Statements, Messages, Labels, Import, Weekly debits, Tools, Plan, Settings (highlighted), and Help. Below the navigation bar, the 'Settings - Your mosed (demo)' title is followed by a sub-navigation bar with links for Setup, Your mosed, Billing, Payments in, Your process (highlighted), General, Statement layout, Parsha, Texts, and Columns. The main content area is titled 'Describe your process' and includes a note: 'Write it the way you'd explain it to a new office worker. It's saved for your organisation (only your team sees it). Last saved 23 Oct 2026, 09:00.' The text area contains the following description: 'We charge £45 a week per child, every Sunday, from the Sunday nearest 1 Elul. The second child gets £5 off. A few families pay monthly by standing order into our bank account; vouchers go to our charity voucher account. Everyone moves up a grade at the start of the year. No charge in the summer weeks. Late payers get a call after three weeks.' To the right of the text area is a box titled 'Things to mention' with a list of bullet points: 'What do you charge: per child, per family, or both?', 'How often: weekly, monthly, per term, yearly? Do some families pay differently?', 'Which day do you charge, and from which date?', 'When does your year start, and what happens at the restart (new year, moving up a grade, new fees)?', 'Discounts: siblings, staff, hardship?', 'Weeks with no charge (summer, bein hazmanim, yom tov)?', 'How do families pay: standing order, vouchers, cash, card? Into which account?', and 'Who chases late payers, and when?'.

Shuls and other organisations

Choose **Shul** or **Other** in *Settings* › *Your mosed* and the whole app speaks your language. For example, *Parents* becomes *Members*, *Children* becomes *Family members*, *Grade* becomes *Membership type* and *Tuition* becomes *Dues*. You can override any word. Nothing about your data changes.

Live demo with made-up households. Try anything: it resets every day.

Reset demo

Other demo

Exit demo

Your shul (demo)

Home

Members

To do

Follow-ups

Payments

Pledges

Texts

Labels

Import

Weekly debits

Tools

Settings

Help

עברית

Members

All members

All active members ...

Who to call ...

Last payments ...

Needs setting up ...

Muted (paid up) ...

+

Search name, phone, family member, ref...

Filters

Auto

Comfortable

Compact

Columns...

CSV

Excel

Print

20 rows - owing £4,474.00

	Ref	Name	Family members	Phone	Balance ▲	Weekly	Last payment	Last amount	Last method	Last description	Flags
☐	1006	Gavriel Gold	Mrs Gold Associate	07700 900778	owes £1,000.00		3 Oct 26	£25.00	Standing order	Standing order – dues	
☐	1009	Levi Klein	Mrs Klein Member	07700 900117	owes £1,000.00		3 Oct 26	£40.00	Standing order	Standing order – dues	
☐	1010	Meir Landau	Dovid Landau, Mrs Landau Member, Member	07700 900484	owes £580.00						
☐	1015	Shaul Salomon	Mrs Salomon Member	07700 900985	owes £440.00						
☐	1002	Shimon Bergman	Mrs Bergman Member	07700 900245	owes £360.00		3 Oct 26	£40.00	Standing order	Standing order – dues	
☐	1011	Naftali Margolis	Mrs Margolis Young couple	07700 900418	owes £350.00		3 Oct 26	£30.00	Standing order	Standing order – dues	
☐	1017	Uri Weiss	Mrs Weiss Member	07700 900891	owes £250.00		3 Oct 26	£40.00	Standing order	Standing order – dues	
☐	1018	Yisroel Zucker	Mrs Zucker Associate	07700 900192	owes £180.00		3 Oct 26	£25.00	Standing order	Standing order – dues	
☐	1003	Nosson Cohen	Mrs Cohen Member	07700 900856	owes £100.00		3 Oct 26	£40.00	Standing order	Standing order – dues	
☐	1005	Eli Fishman	Mrs Fishman Member	07700 900705	owes £80.00		19 Oct 26	£100.00	Achisomoch	Payment – Donation – ...	
☐	1020	Zecharia Stern	Mrs Stern Member	07700 900742	owes £80.00		10 Oct 26	£36.00	Bank transfer	Payment – Kibbud – ה...	

Hebrew (עברית)

Press **עברית** at the top right to switch the app to Hebrew. The layout turns right to left, and your choice is remembered for your login. Press **English** to switch back. Statements and PDFs stay in English, with Hebrew dates, parsha names and any Hebrew names.

דמו חי עם נתונים בדו"ח. נסו הכול: הוא מתאפס כל יום.
אפוס הדמו
הדמו השני
יצאה מהדמו

English
עזרה
הגדרות
כלים
חיוכים שבועיים
יבוא
מדבקות
הודעות
התחייבויות
תשלומים
מעקבים
משימות
חברים
בית
Your shul (demo)

חבר
חברים

+
...
מושחקים (מסולקים)
...
דרוש הגדרה
...
תשלומים אחרונים
...
למי להתקשר
...
כל החברים הפעילים
...
כל החברים

הדפסה
Excel
CSV
עמודות...
צפוף
מרווח
אוטומטי
סינון
חיפוש שם, טלפון, בן משפחה, מס'...

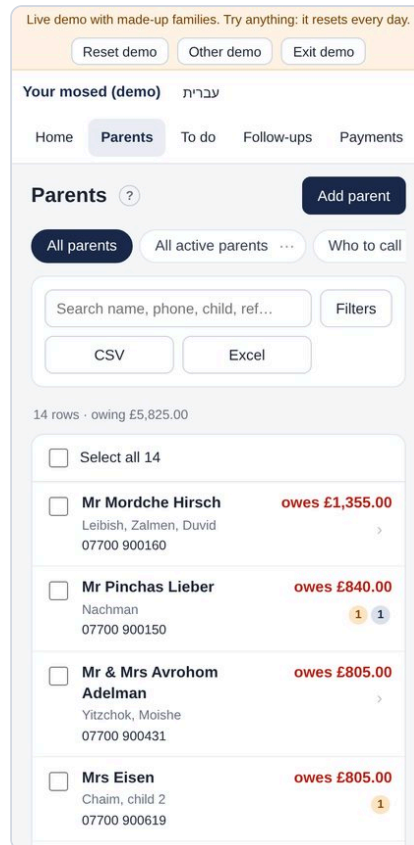
20 שורות · חוב £4,474.00

סימונים	תיאור אחרון	אמצעי אחרון	סכום אחרון	תשלום אחרון	שבועי	יתרה ▲	טלפון	בני משפחה	שם	מס'	
	Standing order – dues	Standing order	£25.00	26 אוק' 3	חייב £1,000.00	900778 07700	Mrs Gold Associate	Gavriel Gold	1006	<	
	Standing order – dues	Standing order	£40.00	26 אוק' 3	חייב £1,000.00	900117 07700	Mrs Klein Member	Levi Klein	1009	<	
					חייב £580.00	900484 07700	Dovid Landau, Mrs Landau Member, Member	Meir Landau	1010	<	
					חייב £440.00	900985 07700	Mrs Salomon Member	Shaul Salomon	1015	<	
	Standing order – dues	Standing order	£40.00	26 אוק' 3	חייב £360.00	900245 07700	Mrs Bergman Member	Shimon Bergman	1002	<	
	Standing order – dues	Standing order	£30.00	26 אוק' 3	חייב £350.00	900418 07700	Mrs Margolis Young couple	Naftali Margolis	1011	<	
	Standing order – dues	Standing order	£40.00	26 אוק' 3	חייב £250.00	900891 07700	Mrs Weiss Member	Uri Weiss	1017	<	
	Standing order – dues	Standing order	£25.00	26 אוק' 3	חייב £180.00	900192 07700	Mrs Zucker Associate	Yisroel Zucker	1018	<	
	Standing order – dues	Standing order	£40.00	26 אוק' 3	חייב £100.00	900856 07700	Mrs Cohen Member	Nosson Cohen	1003	<	
	...nation – New siddurim	Achisomoch	£100.00	26 אוק' 19	חייב £80.00	900705 07700	Mrs Fishman Member	Eli Fishman	1005	<	
	...n – Payment – Kibbud	Bank transfer	£36.00	26 אוק' 10	חייב £80.00	900742 07700	Mrs Stern Member	Zecharia Stern	1020	<	

Install the app

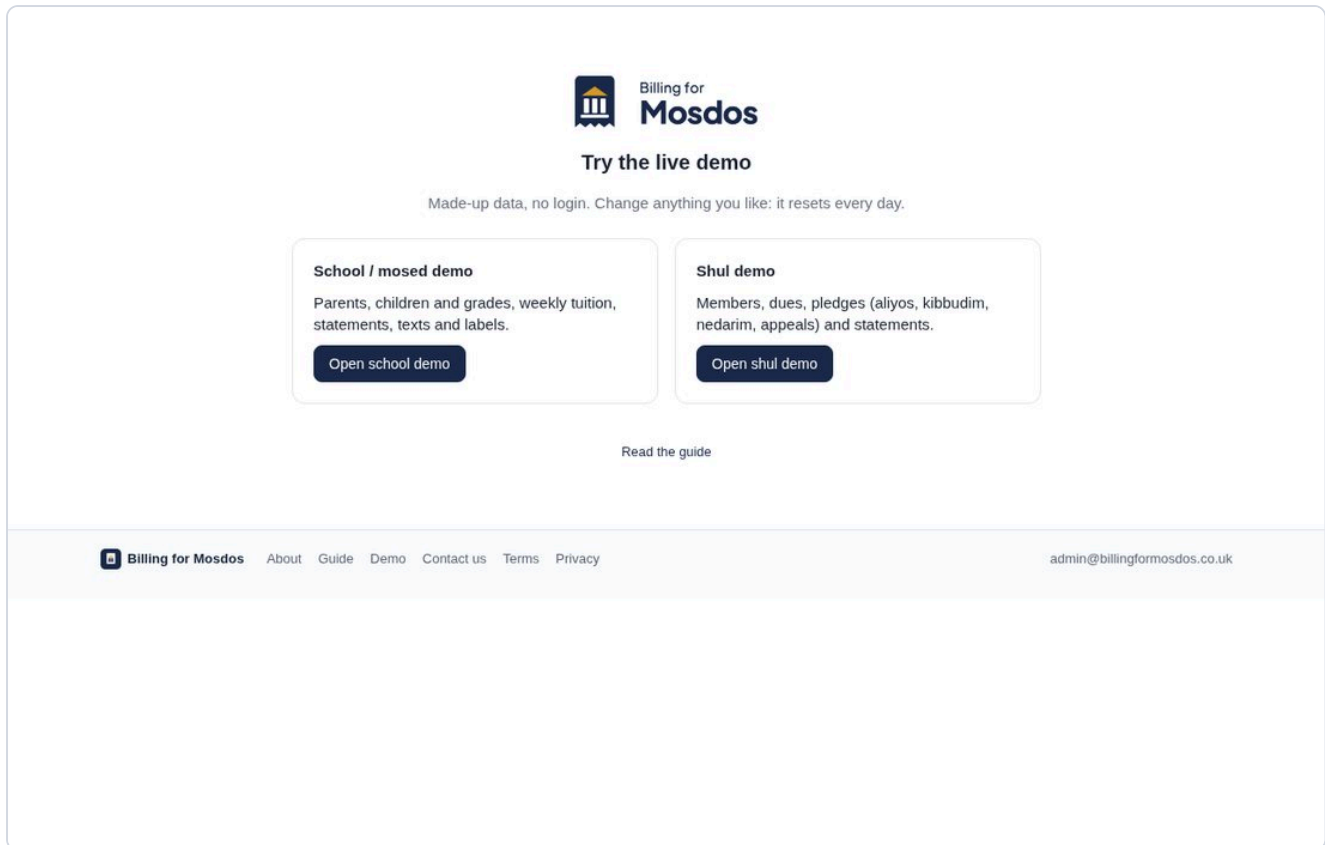
- **iPhone:** open billingformosdos.com in Safari, tap **Share**, then **Add to Home Screen**.
- **Android:** open it in Chrome, tap the  menu, then **Install app** (or *Add to Home screen*).

It opens full screen, starts fast, and updates itself. Changes made while offline are **not** saved: you'll see "offline, not saved".



The demo

[/demo](#) opens two public demos with no login: a **school** and a **shul**. They contain made-up clients and members and are completely separate from real accounts. Change anything you like. *Reset demo* puts the sample data back, and each demo also resets itself daily.



Plan and accounts

Plan (owners) shows your plan, what it includes and this month's texts and emails. An organisation can have **several accounts** (for example the mosed and a separate kollel); one login switches between them at the top. **Split into a new account** moves chosen clients, with their whole history, into a new account beside this one; balances don't change and a split can be undone. Going over a plan limit only shows an "Upgrade needed" note: nothing is deleted, hidden or locked.

The three plans. **Starter** has the full billing system: clients of every kind, charges and the weekly auto-debit, statements with the parsha, payments and imports, bulk add, follow-ups, payer types, files, charts, leavers and History, the school year, pledges, labels and statements by email. **Standard** has everything in the app: Starter plus text messages to each client, sub-accounts and Split, several accounts under one login, the AI assistant and API access. **Pro** is everything in Standard plus work tailored to your organisation: custom features built for you, custom reports and integrations, onboarding and data migration, and priority support. On the Plan page each feature shows *All plans*, *Standard* or *Pro*.

Users and accounts

- **Users** (Settings › Users): invite people as **Owner** (everything) or **Staff** (no settings). They get a one-time link to choose their own password.
- **My login**: change your name, email or password, and link your phone.

- **Several organisations:** one login can belong to more than one organisation. Switch between them at the top right.
- **API tokens:** let trusted tools (such as Tab) read and update your data. Items added that way show "via Tab".
- Every change is recorded in the **change log**, showing who made it and when.

Need help?

Email admin@billingformosdos.com or use the [contact form](#).