

# Admin/Operator Playbook

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Operate support, configuration, auditing, exports, and advanced administration safely.

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## Not Included Yet

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- Payment gateway connection flows are intentionally excluded until gateway setup is complete.

## Feature: Operator Dashboard Triage

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**What it does:** Review operational alerts and KPIs from dashboard.

**Why it matters:** Prioritizes support response quickly.

**Where:** Dashboard `/dashboard/`

**Steps:**

1. Open dashboard.
2. Check alerts, invoices, webhook state, and quick links.
3. Route into affected module.

**Expected result:** Dashboard renders without 500 and links are actionable.

**Troubleshooting:**

- If missing data, seed baseline.
- If wrong tenant, switch school context.

## step\_01 (desktop)

No school membership

## step\_01 (mobile)

No school membership

## Feature: School Context Selector

---

**What it does:** Switch active school context for multi-tenant support.

**Why it matters:** Prevents cross-school operations mistakes.

**Where:** Dashboard > Switch school `/portal/select-school/`

**Steps:**

1. Open select-school page.
2. Choose target school.
3. Return to dashboard and verify context.

**Expected result:** Subsequent pages show selected school data.

**Troubleshooting:**

- No selector when only one school membership.
- Use session reset if stuck context.

**step\_01 (desktop)**

No school membership

**step\_01 (mobile)**

No school membership

## Feature: Billing Dashboard

---

**What it does:** Inspect subscription/billing status and webhook health.

**Why it matters:** Core billing support triage surface.

**Where:** Dashboard > Billing `/dashboard/billing/`

**Steps:**

1. Open billing dashboard.
2. Review health/status blocks.
3. Open invoices/payments lists.

**Expected result:** Billing summary loads and links function.

**Troubleshooting:**

- Webhook warnings may indicate provider issues.
- Confirm school context before action.

**step\_01 (desktop)**

No school membership

**step\_01 (mobile)**

No school membership

## Feature: Invoice Operations

---

**What it does:** Review invoice statuses and retry-related records.

**Why it matters:** Supports failed payment ticket resolution.

**Where:** Billing > Invoices `/dashboard/billing/invoices/`

**Steps:**

1. Open invoices list.
2. Inspect failed/open/pending statuses.
3. Escalate or guide retry flow.

**Expected result:** Invoice list renders and status context is clear.

**Troubleshooting:**

- No invoices means no seeded or live billing records.
- Use school filter/context.

**step\_01 (desktop)**

No school membership

**step\_01 (mobile)**

No school membership

## Feature: Payment Records

---

**What it does:** Review payment attempts and success/failure outcomes.

**Why it matters:** Validates billing state against invoice lifecycle.

**Where:** Billing > Payments `/dashboard/billing/payments/`

**Steps:**

1. Open payments list.
2. Inspect provider/status/amount rows.
3. Correlate with invoice references.

**Expected result:** Payment records render with provider/status details.

**Troubleshooting:**

- No rows means no payments in context.
- Verify invoice-payment linkage for anomalies.

**step\_01 (desktop)**

No school membership

**step\_01 (mobile)**

No school membership

## Feature: Audit Log

---

**What it does:** Inspect action history for support and forensics.

**Why it matters:** Enables traceability for incidents and regressions.

**Where:** Settings > Audit Log `/audit/`

**Steps:**

1. Open audit log.
2. Review actor/action timestamps.
3. Correlate to support incidents.

**Expected result:** Audit feed loads with recent events.

**Troubleshooting:**

- If empty, perform operations to generate events.
- Ensure correct school context.

**step\_01 (desktop)**

No school membership

**step\_01 (mobile)**

No school membership

## Feature: Exports

---

**What it does:** Run data export operations.

**Why it matters:** Supports reporting handoff and backup tasks.

**Where:** Settings > Exports [/exports/](#)

**Steps:**

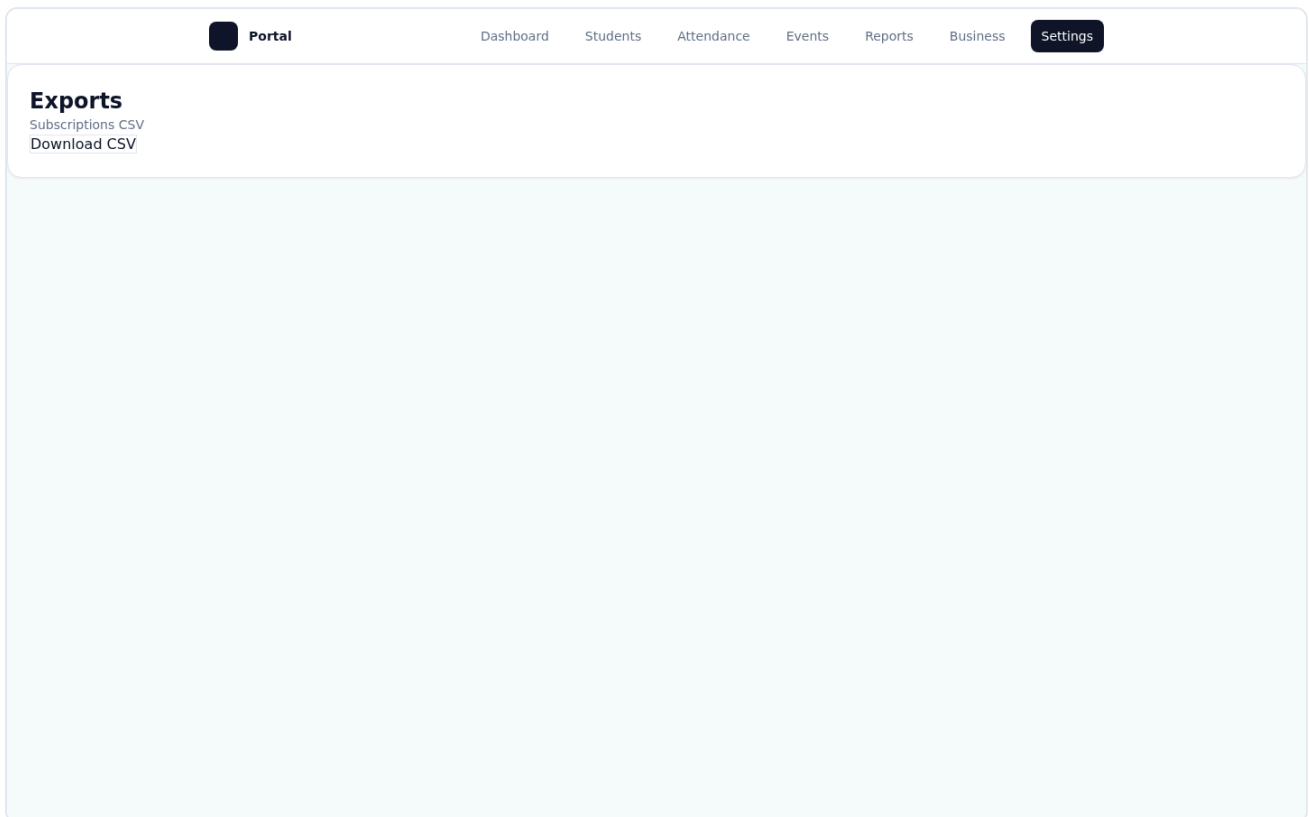
1. Open exports page.
2. Run available export actions.
3. Validate downloaded output.

**Expected result:** Export links/actions respond successfully.

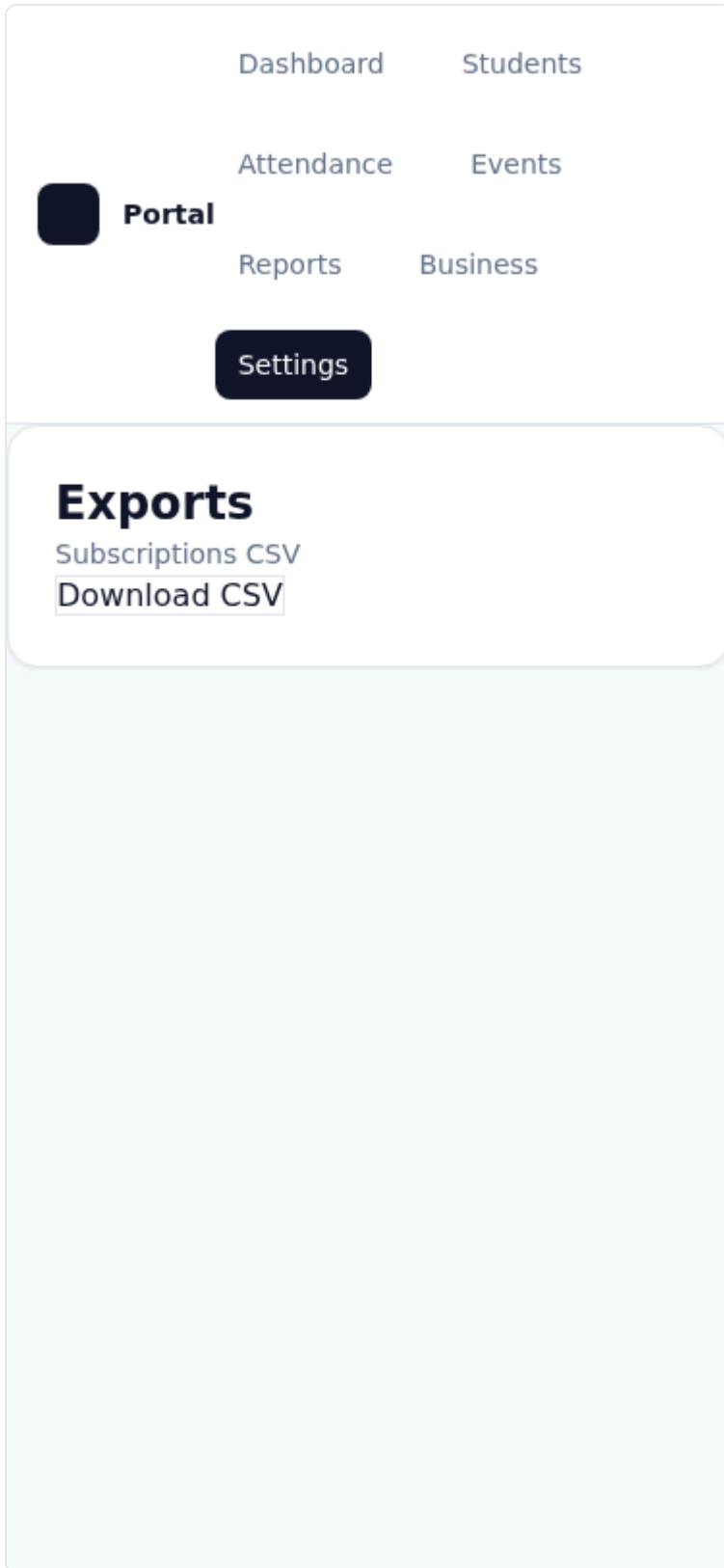
**Troubleshooting:**

- Empty exports reflect empty source datasets.
- Verify operator permissions.

**step\_01 (desktop)**



**step\_01 (mobile)**



## Feature: Appearance Settings

---

**What it does:** Set portal theme and mode for operator usability.

**Why it matters:** Improves readability during support sessions.

**Where:** Settings > Appearance `/settings/appearance/`

**Steps:**

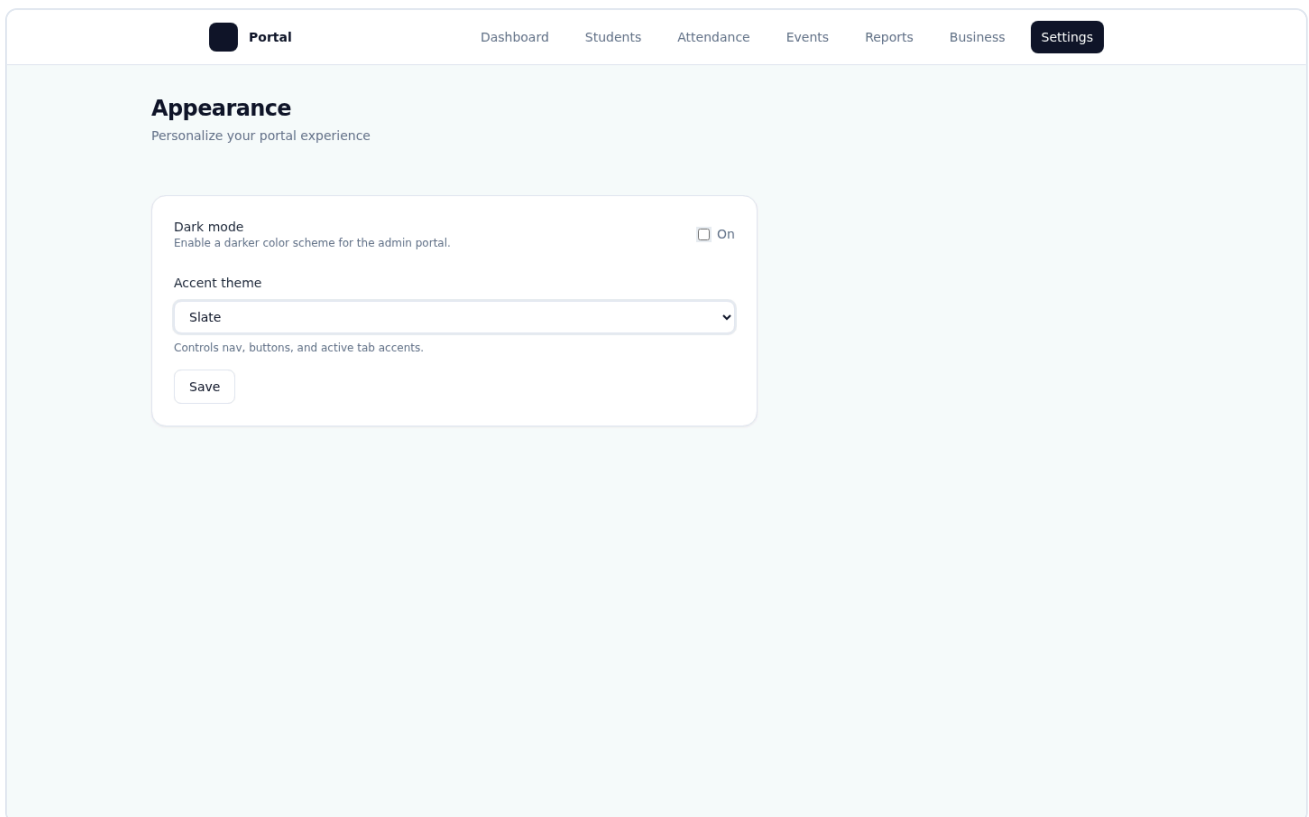
1. Open appearance settings.
2. Adjust theme/dark mode.
3. Save and validate UI changes.

**Expected result:** Preferences persist per user.

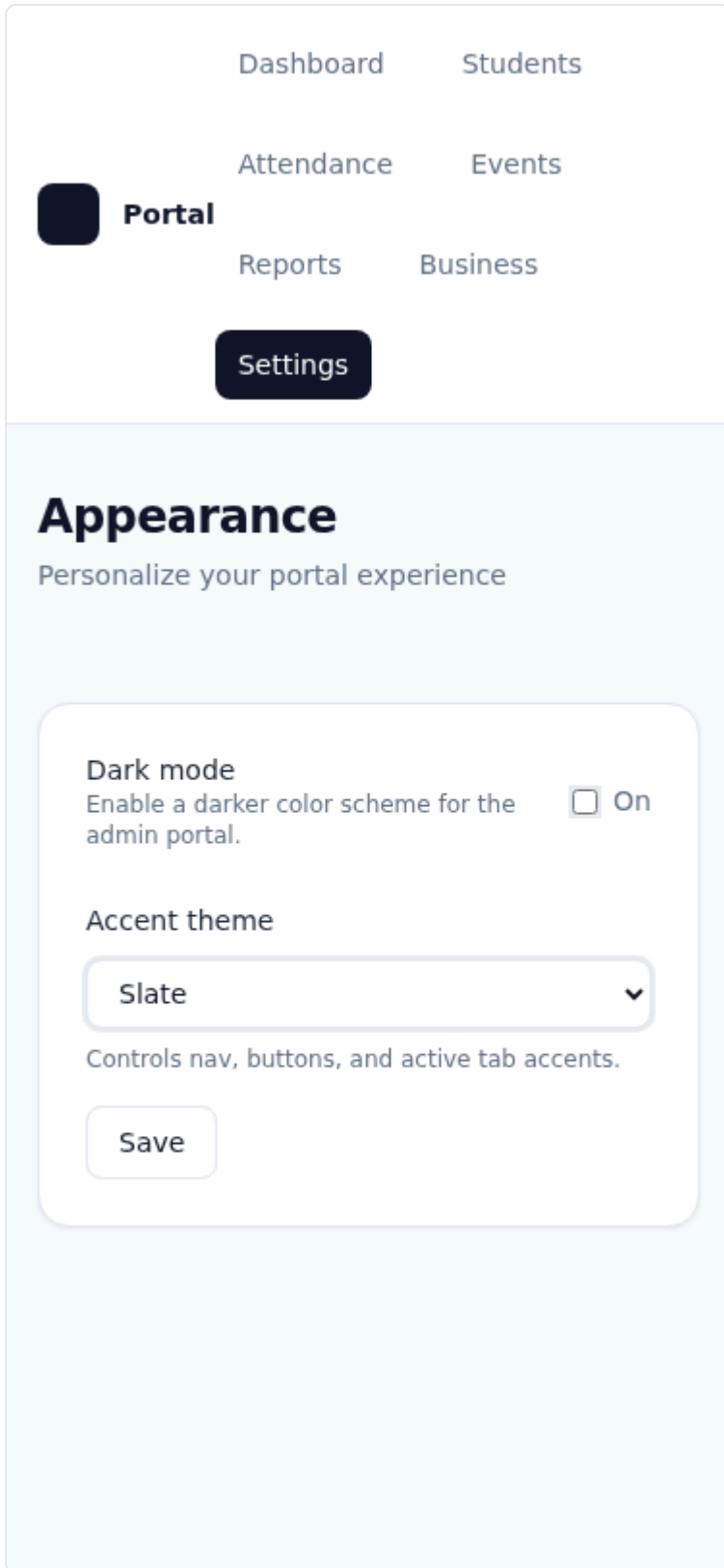
**Troubleshooting:**

- If unchanged, hard refresh and re-check saved values.

**step\_01 (desktop)**



**step\_01 (mobile)**



## Feature: Site Settings + Builder

**What it does:** Access site settings and builder for support adjustments.

**Why it matters:** Allows operator-level content troubleshooting.

**Where:** Settings > Website `/site/settings/`

**Steps:**

1. Open site settings.
2. Open website builder.
3. Validate preview/draft state.

**Expected result:** Settings and builder pages load with school context.

**Troubleshooting:**

- If blocked, verify manage-school permissions.
- If preview fails, confirm template key/config integrity.

**step\_01 (desktop)**

No school membership

**step\_01 (mobile)**

No school membership

**step\_02 (desktop)**

No school membership

**step\_02 (mobile)**

No school membership

## Feature: Schedule Notices Ops

---

**What it does:** Post and remove schedule alerts for students.

**Why it matters:** Critical for closures/weather and urgent updates.

**Where:** Quick Actions > Schedule Notices </schedule-notices/>

**Steps:**

1. Open schedule notices page.
2. Create or remove notice.
3. Verify student dashboard visibility.

**Expected result:** Notice operations complete and reflect on student dashboards.

**Troubleshooting:**

- Must supply title/message/start datetime.
- Check active date range for visibility.

**step\_01 (desktop)**

No school membership

**step\_01 (mobile)**

No school membership

## Feature: Marketing Support Ops

---

**What it does:** Support marketing assets, outbox, and lead widget configuration.

**Why it matters:** Keeps growth tooling reliable for owners.

**Where:** Business > Marketing `/marketing/`

**Steps:**

1. Open marketing hub.
2. Check follow-up outbox and generated assets.
3. Validate widget/referrals/reviews pages.

**Expected result:** Marketing pages render consistently with no 500s.

**Troubleshooting:**

- Outbox items are manual templates.
- If screenshot mismatch, rebuild playbooks.

**step\_01 (desktop)**

Owner access required

**step\_01 (mobile)**

Owner access required

**step\_02 (desktop)**

Owner access required

**step\_02 (mobile)**

Owner access required

## Feature: Django Admin (Advanced)

---

**What it does:** Use superuser admin for deep support and data fixes.

**Why it matters:** Fallback for advanced maintenance tasks.

**Where:** Settings > Admin (Advanced) `/admin/`

**Steps:**

1. Open Django admin.
2. Navigate to relevant models.
3. Apply minimal audited changes.

**Expected result:** Admin index and model pages render for superuser.

**Troubleshooting:**

- If denied, ensure superuser credential is used.
- Prefer portal workflows before direct admin edits.

**step\_01 (desktop)**

## Site administration

ACCOUNTS	
Profiles	<a href="#">+ Add</a> <a href="#">Change</a>

AUDITLOG	
Audit events	<a href="#">+ Add</a> <a href="#">Change</a>

AUTHENTICATION AND AUTHORIZATION	
Groups	<a href="#">+ Add</a> <a href="#">Change</a>
Users	<a href="#">+ Add</a> <a href="#">Change</a>

CORE	
Schools	<a href="#">+ Add</a> <a href="#">Change</a>

MARKETING_ENGINE	
Leads	<a href="#">+ Add</a> <a href="#">Change</a>
Marketing assets	<a href="#">+ Add</a> <a href="#">Change</a>
Marketing events	<a href="#">+ Add</a> <a href="#">Change</a>
Marketing integration settings	<a href="#">+ Add</a> <a href="#">Change</a>
Outbox items	<a href="#">+ Add</a> <a href="#">Change</a>
Referral attributions	<a href="#">+ Add</a> <a href="#">Change</a>
Referral codes	<a href="#">+ Add</a> <a href="#">Change</a>

PORTAL	
Gear catalog items	<a href="#">+ Add</a> <a href="#">Change</a>
Portal user preferences	<a href="#">+ Add</a> <a href="#">Change</a>
Rank gear requirements	<a href="#">+ Add</a> <a href="#">Change</a>
Schedule notices	<a href="#">+ Add</a> <a href="#">Change</a>
Student message replies	<a href="#">+ Add</a> <a href="#">Change</a>
Student messages	<a href="#">+ Add</a> <a href="#">Change</a>
Student profiles	<a href="#">+ Add</a> <a href="#">Change</a>

SAAS_ATTENDANCE	
Attendance marks	<a href="#">+ Add</a> <a href="#">Change</a>
Class groups	<a href="#">+ Add</a> <a href="#">Change</a>
Class meeting times	<a href="#">+ Add</a> <a href="#">Change</a>
Class sessions	<a href="#">+ Add</a> <a href="#">Change</a>
Enrollments	<a href="#">+ Add</a> <a href="#">Change</a>

SAAS_BILLING	
Plans	<a href="#">+ Add</a> <a href="#">Change</a>
Subscriptions	<a href="#">+ Add</a> <a href="#">Change</a>

SAAS_BOXES	
Box memberships	<a href="#">+ Add</a> <a href="#">Change</a>
Boxes	<a href="#">+ Add</a> <a href="#">Change</a>

SAAS_COMMUNITY	
Announcements	<a href="#">+ Add</a> <a href="#">Change</a>

SAAS_EVENTS	
Event registrations	<a href="#">+ Add</a> <a href="#">Change</a>
Events	<a href="#">+ Add</a> <a href="#">Change</a>

SAAS_PROGRESSION	
Rank ladders	<a href="#">+ Add</a> <a href="#">Change</a>
Ranks	<a href="#">+ Add</a> <a href="#">Change</a>
Requirement completions	<a href="#">+ Add</a> <a href="#">Change</a>
Requirements	<a href="#">+ Add</a> <a href="#">Change</a>
Student ranks	<a href="#">+ Add</a> <a href="#">Change</a>

SAAS_SITE	
School site settings	<a href="#">+ Add</a> <a href="#">Change</a>

SAAS_STORE	
Store products	<a href="#">+ Add</a> <a href="#">Change</a>
Store purchases	<a href="#">+ Add</a> <a href="#">Change</a>

## Recent actions

## My actions

None available

SAAS\_WAIVERS

Waiver records [+ Add](#) [Change](#)


Waiver templates [+ Add](#) [Change](#)

SCHOOL\_CONFIG

School settings [+ Add](#) [Change](#)

## step\_01 (mobile)

# Django administration

WELCOME, **OPERATOR@SEED.LOCAL**. [VIEW SITE /](#)  
[CHANGE PASSWORD /](#) [LOG OUT](#) 

## Site administration

### ACCOUNTS

Profiles [+ Add](#) [✎ Change](#)

### AUDITLOG

Audit events [+ Add](#) [✎ Change](#)

### AUTHENTICATION AND AUTHORIZATION

Groups [+ Add](#) [✎ Change](#)

Users [+ Add](#) [✎ Change](#)

### CORE

Schools [+ Add](#) [✎ Change](#)

### MARKETING\_ENGINE

Leads [+ Add](#) [✎ Change](#)

Marketing assets [+ Add](#) [✎ Change](#)

Marketing events [+ Add](#) [✎ Change](#)

Marketing integration settings [+ Add](#) [✎ Change](#)

Outbox items [+ Add](#) [✎ Change](#)

Referral attributions [+ Add](#) [✎ Change](#)

Referral codes [+ Add](#) [✎ Change](#)

### PORTAL

Gear catalog items [+ Add](#) [✎ Change](#)

Portal user preferences [+ Add](#) [✎ Change](#)

Rank gear requirements [+ Add](#) [✎ Change](#)

Schedule notices [+ Add](#) [✎ Change](#)

Student message replies [+ Add](#) [✎ Change](#)

Student messages [+ Add](#) [✎ Change](#)

Student profiles [+ Add](#) [✎ Change](#)

#### SAAS\_ATTENDANCE

Attendance marks [+ Add](#) [✎ Change](#)

Class groups [+ Add](#) [✎ Change](#)

Class meeting times [+ Add](#) [✎ Change](#)

Class sessions [+ Add](#) [✎ Change](#)

Enrollments [+ Add](#) [✎ Change](#)

#### SAAS\_BILLING

Plans [+ Add](#) [✎ Change](#)

Subscriptions [+ Add](#) [✎ Change](#)

#### SAAS\_BOXES

Box memberships [+ Add](#) [✎ Change](#)

Boxes [+ Add](#) [✎ Change](#)

#### SAAS\_COMMUNITY

Announcements [+ Add](#) [✎ Change](#)

#### SAAS\_EVENTS

Event registrations [+ Add](#) [✎ Change](#)

Events [+ Add](#) [✎ Change](#)

## SAAS\_PROGRESSION

Rank ladders [+ Add](#) [✎ Change](#)

Ranks [+ Add](#) [✎ Change](#)

Requirement completions [+ Add](#) [✎ Change](#)

Requirements [+ Add](#) [✎ Change](#)

Student ranks [+ Add](#) [✎ Change](#)

## SAAS\_SITE

School site settings [+ Add](#) [✎ Change](#)

## SAAS\_STORE

Store products [+ Add](#) [✎ Change](#)

Store purchases [+ Add](#) [✎ Change](#)

## SAAS\_WAIVERS

Waiver records [+ Add](#) [✎ Change](#)

Waiver templates [+ Add](#) [✎ Change](#)

## SCHOOL\_CONFIG

School settings [+ Add](#) [✎ Change](#)

Recent actions

**My actions**

None available