

Start here — how the dashboard works

Everything that is the same on every page: signing in, the header, the date buttons, the profile drawer, the Contacted control, moving cards, texting, and where every number comes from.

1 What this page is for

WHAT THIS IS

The Leadership Dashboard is one private website that shows the whole school at once: who asked about a program, who applied, who enrolled, who is in class, who finished, who got certified and who got hired — plus the money attached to each step. Nothing on it is typed in from memory: the numbers come from the school website, from Transition Enroll (the enrollment system) and from what staff record on this dashboard.

WHO CAN USE IT

Only staff with a login. Every page sits behind the sign-in screen, and access is logged. Student contact details are confidential — treat every page as internal.

WHERE TO BEGIN

1. **Today** tells you who is waiting on you right now.
2. **Pipeline** is where you move people forward.
3. **Leads & Admissions** is the full list of inquiries.
4. **Students** is everyone currently in class.
5. **Executive** is the one-page summary for the owner.

Every page title and every section title has a small ? beside it. Click it for a plain-English explanation of that part. The ? **Help** button at the bottom-right explains whichever page you are on.

2 The header, top to bottom

THE TOP BAR

- **All is Well logo** — decoration only; it does not navigate.
- **30d / 90d / 12mo** — the time window most tabs count in. The one you press turns purple.
- **LIVE DATA pill** — green means the dashboard is reading the real database. If it ever says *Simulation*, the numbers are sample data, not real students.
- **Classes portal** — opens the class schedule site in a new tab.
- **Student portal** — opens the site students use to see their own programs, dates and payments. Staff can sign in there with the dashboard password to look someone up.
- **Website** — alliswellhca.com, the public site whose forms feed this dashboard.
- **Wellness site** — the Health & Wellness Center site.
-  **Manual** — opens the manual library (the pages this help is built from).
-  **Overview** — the short walk-through flip-book.
- **Your email** — who is signed in. Anything you save is recorded under this address.
- **Sign out.**

THE TWO MENU ROWS

Row one is the **Dashboard** group (numbers and charts). Row two holds **Student Records** (day-to-day student work), **Transition Enroll · live** (the enrollment system, read-only) and **Operations** (reports, texting, partners). On a narrow screen each row scrolls sideways — use the small › arrow at the right end of the row.

3 Where every number comes from

THREE SOURCES, ONE DATABASE

SOURCE	WHAT IT SENDS	HOW OFTEN
The school website (alliswellhca.com)	Every page visit (anonymous), every inquiry form, every online application, the text-message consent box.	Instantly, as it happens.

Transition Enroll	Programs (catalogue), classes, students, registrations and payments. New students are copied into the pipeline as <i>Enrolled</i> ; student stages are moved forward from class dates.	Every hour, five minutes past the hour, Texas time.
Staff, on this dashboard	Stage moves, Contacted / Not contacted, close-out reasons, ad spend, monthly typed numbers, checklist items, attendance, skills, clinicals, certification results, notes, partners, texts.	The moment you save.

TIME ZONE

Everything is counted in **Texas time** (Central). "Today" starts at midnight in Little Elm, not in London.

TWO DOORS IN, TWO KINDS OF RECORD

Someone who fills in the website form gets a record whose ID starts **AIW-**. Someone who registers in Transition Enroll gets a record whose ID starts **TE-S-** and arrives already at *Enrolled*. The dashboard does **not** yet join the two by phone or email, so a person who inquires on the website and later enrolls in Transition Enroll shows twice: mark the website record Contacted and move it along by hand so it does not sit in the Today queue.

Three students are missing a dashboard record (they enrolled before the sync existed). They appear on the Transition Enroll tabs but not in the Students tab. Mission Metrics will add them.

4 The person profile drawer

Click a name on Today, a card on the Pipeline, or a student on Class Progress and a panel slides in from the right. It is the one place to see everything about one person.

TOP OF THE DRAWER

- Name, program and stage.
- **Call** — dials the phone on the record (works on a phone or a Mac with iPhone calling).
- **Text** — opens the Communication Center with this one person already chosen.
- **Email** — opens your email app with their address filled in.

CONTACT

Phone and email exactly as they gave them.

WHERE THEY ARE

ROW	MEANING
Stage	The pipeline stage right now.
Program	What they asked about or enrolled in. Website inquiries show the website's short program code (e.g. cna-3-week-evening); Transition Enroll students show the full program name.
Tuition attached	The published tuition of that program, or — if the program has no published price.
Came to us through	Website form, website application, Transition Enroll registration, or Transition Enroll inquiry — and, for website visitors, whether they came from a link (Facebook, Google...).
Arrived	The date the record was created and how long ago that was.
Contacted?	The green/red dropdown. See <i>Marking someone Contacted</i> .
How	Phone call, text, email or in person — and who recorded it.
Owner	The staff member responsible, or Unassigned.
Text consent	Yes if they ticked the text-message box on the website form; No if they left it unticked; — if the form did not ask (Transition Enroll students).
Employed at / Student since / Diploma-GED / Certified before / Wants career services / How they heard	Shown when the record has them — Transition Enroll students carry the enrollment-form answers.

PAYMENTS

For Transition Enroll students: every payment with date, amount and status, and the total paid.

TEXTS AND FOLLOW-UPS

Every text the school has sent this person from the dashboard or automatically (welcome text, staff alerts do not appear here), newest first, with sent / failed / queued status.

WEBSITE ACTIVITY

The pages this person looked at on alliswellhca.com, if their visit was tied to their inquiry.

5 Marking someone Contacted / Not contacted

The same green/red dropdown appears in three places and they all change the *same* record: the **Today** queue (Contacted? column), **Leads & Admissions** (under Response time) and the person's **profile drawer**.

TO MARK SOMEONE CONTACTED

1. Change the dropdown from **Not contacted** to **Contacted**.
2. A small box opens inside the page: **Date and time** (already set to now — change it if the call happened earlier) and **How** (phone call, text, email, in person, or leave as "Not recorded").
3. Press **Save**. The time cannot be in the future.

WHAT HAPPENS WHEN YOU SAVE

- The record gets the contact date and time, the method, and your email as the person who recorded it.
- The database works out the **minutes from arrival to first contact** itself — that feeds Speed to Lead and the "Response time" column.
- A brand-new lead (stage *Lead*) is moved to the *Contacted* column of the Pipeline automatically.
- Every tab redraws so Today, Leads & Admissions, Speed to Lead, the Pipeline, the profile and the 6 pm digest all agree.
- The change is written to the audit log.

TO CHANGE THE DATE OR TIME LATER

Click the date shown beside the green dropdown; the same box opens.

TO UNDO

Choose **Not contacted**. The contact fields are cleared. If the person had been moved to *Contacted* automatically they go back to *Lead*; a stage set by hand is left alone.

Moving a card out of **New Lead** on the Pipeline asks the same question in the same box, so there is only one way to record a first contact.

6 Moving people along the Pipeline

THREE WAYS TO MOVE A CARD

1. The small <> arrows on the card move it one column back or forward. A greyed arrow means the card is already in the first or last column (hover it to see the hint).
2. **Drag** the card and drop it on another column.
3. In **Parked & closed out**, press **Reactivate** to bring a parked person back to the stage they were at.

LEAVING NEW LEAD

The first time a card leaves New Lead the dashboard asks when and how the person was contacted, in the in-site box. Cancel leaves the card where it was.

WHAT THE COLUMNS MEAN

COLUMN	MEANS
New Lead	Asked about a program; nobody has spoken to them yet.
Contacted	Staff have made first contact.
Interested	Still keen after the first conversation (the system calls this <i>Qualified</i>).
Application Started	Began the online application.
Application Completed	Finished it and was accepted.

Deposit Pending	Accepted, waiting on the deposit (a display column — the deposit itself is recorded in Transition Enroll).
Enrolled	Registered in a class in Transition Enroll (the hourly sync places new students here).
Active Student	The class has started. Moved here automatically on the class start date.

After the class ends the person moves off the board to *Completed*, then *Certified* and *Employed* as staff record those on the Student Records tabs.

PARKING SOMEONE

Close-out reasons (Cost / funding, Not eligible yet, Schedule conflict, Never responded, Went elsewhere, Just researching) are recorded when a lead is closed; the board groups them into the five side lanes. Nothing is deleted.

7 Texting, alerts and the 6 pm digest

THE SCHOOL TEXTING LINE

All texts go out from (940) 312-5305, the RingCentral line registered to the Info@ mailbox. Replies land in RingCentral, not on the dashboard.

AUTOMATIC TEXTS

- **Welcome text** — sent the moment someone submits the website inquiry form with the text-consent box ticked.
- **Staff alerts** — a text to the staff phone when a new lead, a new application or a new enrollment arrives.
- **6 pm digest** — one text a day at 6 pm Texas time: new leads, never-contacted, applications open, enrollments, and the people who need a call.

TEXTS YOU SEND

Use the **Comms** tab (Communication Center) or the **Text** button on a profile. Texts go only to people with a valid phone who have not opted out. Every text is logged on the person's profile.

EMAIL

Emails from the Communication Center go out from info@alliswellhca.com through the school's email service (Resend) to the email on the person's record. If the email key is ever missing on the server, emails wait in the Outbox as "saved, not sent" and the result line says so.

8 The "?" buttons and this manual

Every page title and section title carries a small ?. Click it for a short explanation in the page. Press **Esc** or click outside to close it. The bottom link, **Open the full manual page**, opens the long version for that tab in a new tab.

The floating ? **Help** button (bottom-right) explains whichever tab is showing.

The manual library (the  **Manual** button) has one page per menu item plus this Start-here page. The popups and the manual are written from the same text, so they always match.

9 Step by step

Sign in

1. Open all-is-well-dashboard.vercel.app.
2. Type your staff email and password (the same login works on the Student Portal staff side).
3. Press **Sign in**. Your email appears at the top-right; that is the name the dashboard records when you save something.
4. To leave, click **Sign out** at the top-right.

Change the time window

1. At the top of the page click **30d**, **90d** or **12mo**.
2. Most Dashboard-group tabs (Overview, Leads & Admissions, Programs & Revenue, Outcomes, Marketing ROI, Capacity, Speed to Lead, Revenue, Pipeline) count only people who *arrived* inside that window.
3. Some tabs ignore it on purpose: **Website Activity** has its own 7 / 30 / 90-day / 12-month buttons; **Monthly Stats** has its own month arrows; **Students** shows everyone in class regardless of when they arrived; the four **Transition Enroll** tabs are all-time.

Open a person's profile

1. Click a person's name on the Today queue, the Pipeline (click a card), or Class Progress.
2. A drawer slides in from the right with everything about that person (see *The person profile drawer* below).
3. Click < **Back** or press Esc to close it.

Print a page or save it as PDF

1. On the Overview tab click **Print / save PDF**.
2. In the print window choose **Save as PDF** as the printer.
3. The "?" buttons and the floating Help button are hidden automatically on paper.

10 If something looks wrong

The page says "Simulation data".

The database keys are missing from config.js on that deployment. Real data returns the moment they are set; nothing else needs rebuilding. Tell Mission Metrics.

A number looks lower than Transition Enroll.

Check the time window (30d / 90d / 12mo) first. Then remember the hourly sync: something entered in Transition Enroll in the last hour may not be here yet.

I saved something and it did not stick.

A red message with the reason appears at the point you saved. If it says "Could not save", take a screenshot and send it to Mission Metrics. Refresh the page and check again before re-entering.

The dashboard is slow to open.

The first load pulls every inquiry and the full all-time roster (hundreds of rows) and draws about forty charts. Ten seconds on a slow connection is normal; after that, moving between tabs is instant.