

# Admin Guide

How to run the FUN Member Hub admin workspace: invites, members, booths, events, helpers, payments, audit logs, and security.

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**Site:** <https://funmemberapp>

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## 1. About the admin workspace

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The admin workspace at `/admin` is where staff manage members, booths, events, helpers, volunteers, payments, and invites. Access is restricted — you'll be redirected to the login page if you're not signed in as staff.

## REAL-TIME UPDATES

Members and booths sync in real time between staff devices. If another staff member approves an application while you're viewing the list, you'll see the change appear without refreshing.

## 2. Roles at a glance

Every staff user is assigned one or more **roles**. A role decides what tabs appear and what actions are available. **Per-user overrides** can grant or revoke individual capabilities on top of the role preset.

ROLE	GRANTED BY	WHAT THEY CAN DO
Founder	Manual assignment only — no self-signup, no invite	Everything, including create/revoke invites, manage staff roles, toggle feature flags, view audit logs
Dev	Founder invite	All admin capabilities plus the developer debug panel
Admin	Founder invite	Members, booths, events, helpers, volunteers, payments, exports — all read/write
Staff	Founder invite	Members and booths (view/edit), events/helpers, volunteers, payments view, exports
Assistant	Founder invite	Members view, booths view, events/helpers edit, volunteers edit, payments view
Temp Employee	Founder invite	Read-only across the workspace

## FOUNDER IS INVITE-ONLY AND NEVER AUTO-GRANTED

The old *first user becomes founder* safety net has been removed. To grant Founder, an existing Founder must edit the user's roles directly in the database. Don't accept Founder invitations from anyone but a known maintainer.

## 3. Inviting a new staff member

Inviting is the only way to add staff. Only Founders see the **Staff** tab.

- 1 Open **Admin** → **Staff**.
- 2 Click **Create invite**. Enter the person's email, full name, and role.

- 3 Pick an **invite expiry** in days (1–30). The invite must be redeemed before this expires.
- 4 Optionally set an **access-expires-on date** — useful for temp employees or seasonal staff. After this date their capabilities are automatically revoked.
- 5 Optionally override capabilities using the checklist (e.g. grant *exports.run* to an assistant).
- 6 Click **Send invite**. The recipient receives an email containing a **6-digit PIN**.
- 7 They visit `/redeem-invite`, enter the email and PIN, create a password — and they're in.

## Pending invite controls

- **Resend PIN** — generates and emails a new PIN if the original was lost.
- **Revoke** — invalidates the invite immediately. Use this if the wrong email was used.

### LOCKOUT PROTECTION

After several wrong PIN attempts an invite locks for a cooldown period. Founders can resend a fresh PIN to reset.

## 4. The Members tab

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The Members tab is most staff's main view. The table shows member number, name, type, status badge, paid-through date, and notes preview. Use the search bar to filter by any of those fields.

### Approving an application

- 1 Find the row with status *Pending Review* or *Applied*.
- 2 Click the inline **Approve** button.
- 3 The system assigns the next member number and sends the *Application Approved* email automatically.

### Editing a member

Click any row to open the **Member Drawer** on the right. You can edit every field: contact info, tier, status, dues amount, date paid, paid-through, QB sync, club, topics, joined year, renewal/booth status, and notes. Changing status sends the *Application Status Changed* email (the Approve button uses its own email).

### Collecting dues inline

The drawer has a PayPal button so you can take payment without leaving the row — useful at the front desk during a show.

## Payment history

Below the form is the member's full payment log — every PayPal capture, refund, or manual entry with timestamps.

## Soft delete and recycle bin

Deleting a member doesn't destroy data — it moves them to the **Recycle Bin** (in the top-right dropdown) for 120 days. You can restore them any time within that window.

## Export and import

- **Export** — choose columns and download as CSV. A one-click *Members CSV* button also exports the full member list with renewal and booth fields.
- **Import** — bulk upload members via CSV at `/admin/import`. The importer validates each row before committing.

# 5. The Booths tab

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Use the event picker to switch between shows. The **Manage Events** button creates and edits events.

## Table vs. 3D floorplan

Toggle between a sortable table and an interactive 3D floorplan. The floorplan colors booths by status (Available, Held, Assigned, Paid) and lets you click a booth to open the drawer.

## Booth drawer

Edit booth number (with section prefix picker and auto-increment), vendor name, size, status, special requests, table number, and assigned event. Use sections (e.g. `A-100`, `B-200`) to group booths by area.

## Assigning dealers and helpers

- 1 Open the booth drawer.
- 2 Search for an existing member by name or email, *or* create a new member record right from the drawer.
- 3 Set their role: **lead** (the booth holder), **helper**, or **volunteer**.
- 4 Save. Use the inline PayPal button to collect the booth fee.

## 6. The Event Helpers tab

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Event helpers are non-staff volunteers and paid helpers attached to a single event. Manage them per-event using the event picker at the top.

### Adding a helper

- 1 Click **Add helper**. Enter their name, email, phone, role, area, shift times, and any notes.
- 2 Save.
- 3 Click **Invite via email** to send them the *Event Helper Invite* email — this contains the RSVP link and (if portal access is granted) a link to /portal.

### Granting portal access

Use the **Access** button on the helper row to open the portal capabilities dialog. Check the boxes for what they should see in their portal:

BOX	LETS THE HELPER...
<b>View my schedule</b>	See their own shifts (event, role/area, times)
<b>View team roster</b>	See other helpers assigned to the same event
<b>See roster contact info</b>	See teammates' phone/email (off by default — turn on only when helpful)
<b>Run attendee check-in</b>	Use the check-in scanner on show day
<b>Edit own profile</b>	Update their own name and phone
<b>View staff notes</b>	See internal notes you've written about their role

#### DEFAULT ACCESS

New helpers get *View my schedule* and *Edit own profile* by default. Add more as needed.

### Promoting a helper to staff

Founders can promote a helper into a full staff role from the helpers tab. This sends a staff invite to their email.

## 7. The Volunteers tab

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Volunteers are a separate roster from event helpers — typically year-round members who help across multiple events. Only Founders see this tab. The interface mirrors the helpers tab, including

portal capabilities and invite flow.

## 8. Recycle Bin

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Open the top-right **Recycle Bin** dropdown to review soft-deleted members and booths. Each row shows when it was deleted and by whom. Click **Restore** to put it back, or **Permanently delete** to remove it forever. Items auto-purge after 120 days.

## 9. Audit Log

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The **Audit Log** dropdown shows the last 200 actions across the workspace: who did what, when, from what IP / region, and using what device. Use it to investigate accidental changes or confirm an action took place. The log is append-only — you cannot edit entries.

## 10. Flags & Experiments (Founder only)

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Founders can toggle **feature flags** and view A/B **experiment assignments**. Flags let you turn new features on for everyone, a percentage of users, or only specific roles, without redeploying. Experiments are sticky — once a user is assigned a variant, they keep it across sessions.

### BE CAREFUL

Disabling a flag that powers a live feature will hide it from members immediately. Coordinate with the team before toggling anything in production.

## 11. Payments and refunds

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Every PayPal payment is recorded against the member who paid. View the full history inside the member drawer or filter by date and amount via the Payments view. Refunds require the `payments.refund` capability — ask a Founder if you need it.

### SERVER-SIDE VERIFICATION

Before recording a payment we re-fetch the order from PayPal on our server to confirm the amount and currency. This means a tampered browser request can't credit a payment that wasn't actually made.

## 12. Email system

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Transactional and event-driven emails are sent via Resend through a server-side queue. You don't normally need to touch this — emails fire automatically when you approve, change status, send an invite, or capture a payment. If a member reports they didn't receive an email:

- Confirm the email address on their record is correct.
- Check the email-unsubscribe table — if they've unsubscribed, non-transactional emails won't send.
- Ask them to check spam and add `@funmember.app` to their address book.
- For receipts, you can resend by re-opening the payment row and using the resend action.

## 13. Cron jobs and integrations

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- **Renewal reminders** — a scheduled job sweeps for members whose paid-through date is approaching or has lapsed, and sends the renewal email.
- **Google Sheets backup** — a scheduled job exports the latest member data to a backup spreadsheet for offline reference and disaster recovery.
- **PayPal webhook** — PayPal calls our server when payment events fire (capture, refund, dispute). The signature is verified before we trust the payload.

### WHERE THE CRON ENDPOINTS LIVE

The two cron endpoints ( `/api/public/hooks/renewal-reminders` and `/api/public/hooks/sheets-backup` ) are publicly reachable but should only be called by the scheduler. If you want to test, ask a developer to trigger them in dev.

## 14. Security checklist for staff

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- 1 **Never share your sign-in.** Each staff member must have their own invited account so audit logs are accurate.
- 2 **Use a strong, unique password.** A password manager is strongly recommended.
- 3 **Revoke access promptly.** When a volunteer or temp employee leaves, set their access-expires-on date or delete them from the Staff tab.
- 4 **Watch the audit log.** Unexpected exports, role changes, or member deletions should be investigated.
- 5 **Don't accept Founder invites you didn't expect.** Founder is granted manually by an existing Founder only.

## 15. Troubleshooting

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SYMPTOM	WHAT TO TRY
I can't see the Staff or Volunteers tab.	You're not a Founder. Ask a Founder to grant the role or add the capability override.
A helper says the portal shows no assignments.	Check the email on their helper row matches the email they signed in with. Auto-claim only links rows when emails match exactly.
An invite PIN isn't working.	It may have expired or been mistyped. Revoke and re-send a fresh invite from the Staff tab.
A payment captured in PayPal but isn't on the member's record.	The webhook may have been delayed. Re-open the member, click PayPal-resync, or check the audit log for an error.
The 3D floorplan is blank.	The selected event has no booth records yet. Add booths from the table view or assign them an event.