

Bark & Purr — Staff Tools Operating, QA & Training Guide

v1 · 2026-06-24 · Covers **Compass** (manager command surface) & the **Staff Day Board**. Triple purpose: ① QA test reference · ② product documentation · ③ training-guide foundation. (Draft — to be conformed to the Product Intelligence chair's required format.)

How to read each control table: **Control** = the button/field as labeled · **What it does** = the action · **Updates / links to** = where the result shows ·  **QA-expected** = tap it and confirm this happens (this column is the test step). **PENDING** = on the change list, not built/verified yet.

1. The two tools

Tool	File / URL	Who uses it	Purpose
Compass	staff_landing.html → /compass.html	Manager / Owner (admin)	Command surface: dog count, who's on, notes/updates, password resets, employee management, clock oversight, the schedule.
Staff Day Board	staff.html (gate: ZenDen26 , or auto SSO from Compass)	Front desk · bathers · groomers · manager	The daily floor tool: arrivals, the per-pet workflow card, capacity, the master view.

Both pull appointment data from **MyTime** (the system of record) via the `bnp-staffhub` / `bnp-staff` Workers. Compass is being established as the single source of truth for roster & schedule.

2. By role — what each person does

- Front Desk** — Check in arrivals as they come; post a "Today's Update" heads-up; check off booked add-ons on each pet; watch Expected / Going-Home; handle **Check Out & payment** and flag anyone who left unpaid.
- Bather** — Find your assigned pets; tap **Start Bath** when you begin and **Bath Done** when finished; clock in to the **bathing** position (cross-utilized staff also clock front desk / kennel).
- Groomer** — **Start Groom / Groom Done**; add **notes** + a **photo**; tap **Glamour ✓** when finished; **Confirm Done** when all steps are complete; rate the bather.
- Manager / Owner (Linda)** — Use Compass for the day's count, notes, schedule, employees, password resets and clock oversight; use the staff **Master view** to see every pet, price, unpaid flags and add-ons at a glance.

3. Compass — every control

Control	What it does	Updates / links to	 QA-expected
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Sign in	First name + password login	Opens the app	Valid → app loads; wrong pw → inline error, no lockout
Change-password card	First login on the generic password forces a personal one	Auth (must_reset cleared)	Generic pw → change card appears before app; new pw saves; admins not trapped
Today's Dog Count	Headline count for the day; admin can set a manual override or revert to auto	Count card	Shows a number; override saves & can revert. PENDING: must equal MyTime/staff (source-of-truth wiring)
Who's On Today	Lists staff working today	Who's-On card	Shows today's staff. PENDING: should derive from the schedule
Today's Note	Admin posts the day's note (replaces yesterday's)	Note card (read-only to staff) + staff.html shop-notes strip	Admin edits → saves → shows to staff read-only
Today's Update	Anyone posts a heads-up	Update feed (Compass + staff)	Post → appears immediately
Reset a Password	Admin issues a temp password for a staffer + forces change next login	Auth; temp shown once	Pick staffer → temp password returned to relay; never shows real passwords
Employee Management	Add an employee	Roster	Add → appears. PENDING: Delete (remove from schedule + staff file)
On the Clock	Live roster of who's punched in + since when; punch In / Break / Out; position punches (bathing / front desk)	bnp-clock punches	Punch reflects on the roster. PENDING: every employee mapped/visible; friendly position dropdown (Front Desk · Kennel · Bathing)
Standard Schedule → Save Template	Saves each person's recurring weekly schedule	Schedule template	Edit + Save → persists with no error (the "rows is not defined" save bug is FIXED)
Standard → Save + Apply Both Weeks	Saves template + pushes it to Week 1 & Week 2	Week 1 (Current) + Week 2 (Next)	Both weeks adopt the template
Standard → Copy Week 1/2 → Standard	Restores the template from a week (after an accidental edit)	Standard template	Confirm prompt → template matches that week
Week 1 (Current) / Week 2 (Next) → Copy from Standard · Copy → Week 2	Pull the template into a week / copy Week 1 into Week 2	That week + the live schedule + employees' view	Edits to Week 1 update the current schedule. PENDING: Sunday auto-rollover (next→current)

4. Staff Day Board — every control

4a. Welcome Board (front-desk default)

Control	What it does	Updates / links to	✅ QA-expected
Arrival row	Tap a booked pet	Jumps to that pet's day/card	Tap → opens the pet
Add-on chip	Tap-to-complete a booked add-on	Done-state (shared via KV) — shows on Welcome + Master + card	Tap → turns green ✓ instantly on the current view
Heads-Up Today	Who's out today	Heads-Up strip	PENDING: should pull from the live schedule; "mark out" pop-up should add the person here
Staff Capacity	Per-staff booked vs capacity (dog grooms / cat grooms / bath load)	Capacity grid	Bars fill; amber ≥85%, red over. PENDING: show only ACTIVE staff; keep names synced to Compass
Week at a Glance	Booked/capacity per day for the week	Week tiles	PENDING: "mark someone out for the day" doesn't persist; scheduled-today should sort to top
Help?	Should open the help guide	—	PENDING: link is dead — wire to the help doc

4b. The Pet Card — the core workflow

Top of the card is the **flow chart**: Checked In → **Bathing...** / **Bath Done** → Notes → Photo → Glammed → Done, with a fill bar. Every status tap now repaints the on-screen view (fixed).

Button	What it does	Updates / links to	✅ QA-expected
Check In	Marks the pet arrived (stamps time); tap again to undo	Status → flow chart, Master, lifecycle tabs	Tap → "Checked In" lights + time stamped; undo reverts
Start Bath	Bath started	Flow chart shows amber "Bathing..."; bather strip badge	Tap → "Bathing..." pulses on the flow chart (was the reported bug — FIXED)
Bath Done	Bath complete	Flow chart "Bath Done" green; groomer gets "Ready for Groom" badge	Tap → step turns green; bath duration recorded
Start Groom / Groom Done	Groom start/finish (timestamps)	Status + groom duration	Tap → status advances; times recorded

Glamour ✓	Confirms blow-dry / bandana finish (required before Done)	Flow chart "Glammed"	Tap → "Glammed" lights
Walked ✓	Logs a walk (dogs; reminder every 3h)	Walk history; overdue turns card orange	Tap → walk logged with who/time
Confirm Done	Marks the pet finished — gated until all steps complete	Status → "Done"; Going-Home	Enables only when steps complete. PENDING: gate too rigid for bath-only (needs photo/glam) — make service-aware
Notes (per role)	Groomer/FD notes on the pet	Saved per appointment (KV)	Type → saves. PENDING: push to MyTime; confirm per-pet history loads each visit
Photo	Upload / view / delete a finish photo	Photo store (KV)	Upload → shows; delete → removes
Pricing	Shows the service price; staff can adjust	Card price	PENDING: show BASE price only (upgrades billed separately); price-adjust should write to MyTime
Check Out · Mark Paid	Checkout + payment status; flags "checked out but NOT paid"	Card + unpaid badge on Master	PENDING: drive from MyTime checkout/paid fields; surface "left without paying" on Linda's view
Star rating	Groomer rates bather; FD/mgr rates service	Ratings + auto-score	Set stars → saved

4c. Master view (Linda) · Lifecycle tabs · Navigation

Control	What it does	✓ QA-expected
Master view	Every pet today: status, groomer/bather, price, add-ons, unpaid flag	Lists all of today; reflects status/price/unpaid
Lifecycle tabs (Expected / Checked In / Going Home / All)	Filter the board by stage	Each tab filters + counts correctly
Day / Week scrub	Navigate to other dates	Changes the day shown; counts follow
Role picker	"Who am I" — filters to your pets	Pick → board filters to that person
Team Chat	Shared chat (same as Compass)	Send → appears for others

5. Help bubbles ("?" content) — current

Seven "?" bubbles exist on each tool. Current text:

Key	Bubble text
Login	Sign in with your first name + password; sign out on a shared screen.
Count	Today's dog number. Admins can set a manual count or go back to auto.
Note	Admins post the day's note — it replaces yesterday's.
Update	Anyone can share a heads-up for the day.
Clock	Tap In to start, Break when you step away, Out when you finish.
Fix punch	Forgot a punch? Fix the time here — a reason is required.
Schedule	Who's on today. Admins can edit a shift's hours.

Gaps to add bubbles for: the pet-card status flow, Glamour/Walked/Confirm-Done, pricing, checkout/payment, Master view, capacity. (Self-Teaching Standard: every control should teach itself.)

6. Known gaps / pending (so QA & PI know what's NOT done)

Area	Pending item
Compass count	Reconcile to MyTime/staff (source-of-truth wiring)
Who's-On / Heads-Up	Derive from the live schedule
Capacity	Active-only; keep synced to Compass roster
Week at a Glance	"Mark out" must persist + feed Heads-Up
Employees	Delete (remove from schedule + staff file) — Add exists
Clock	Every employee mapped/visible; position dropdown (FD · Kennel · Bathing)
Schedule	Sunday auto-rollover (next → current; new next from template)
Pet card pricing	Base-price-only display; price-adjust → MyTime write
Notes	Push to MyTime; confirm per-pet history
Checkout	Drive from MyTime checkout/paid; "left unpaid" alert on Linda's view
Completion Gate	Make service-aware (don't block bath-only on photo/glam)
Help	Wire the dead "Help?" link to this guide; add the missing bubbles

7. Using this for QA

Run top-to-bottom on the live tool: for each row, do the action in the **Control/Button** column and confirm the  **QA-expected** result. Mark PASS/FAIL. Anything marked **PENDING** is expected to be incomplete — note it, don't fail it. Test on a **phone** too (bathers/groomers are mobile).

Source: `03_OPS/docs/StaffTools_Operating_QA_Training_Guide_v1_20260624.html` · Built by Code Lead, 2026-06-24, from the live `compass.html` + `staff.html` . To be conformed to the Product Intelligence chair's required documentation format.