



STAFF GUIDE · GRADESPACE GROUP

# Running your group's website: a guide for your team

Everything your team needs to run the website day to day, in plain words.

**Gradespace Group**  
for WordPress, version 0.1.1

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[thegradespace.com](https://thegradespace.com)

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This guide covers the website day to day: your businesses, enquiries, listings, stock and machines, clients and their orders, and who sees what. You don't need any technical knowledge.

Features marked **(Pro)** need a Pro or Agency licence.

# 1. Signing in

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- Go to your website's address followed by **/wp-admin** (for example `yourgroup.com/wp-admin` ), or click **Staff sign-in** at the very bottom of any page.
- Sign in with your own username and password. Please **don't share accounts**: the website records who did what, and with Pro each person only sees the businesses they look after.
- After signing in you go straight to **Group → Today**.
- Forgotten your password? Click **Lost your password?** on the sign-in page. After 5 wrong passwords, sign-in pauses for 15 minutes.

## 2. Your daily start: Group → Today

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- **New enquiries**, newest first, with the business each one is for.
- **Stock running low** and **restock tasks** (Pro).
- **Plans renewing soon** and orders waiting (Pro).

The red numbers on the left-hand menu show how many things are waiting.

## 3. Your businesses

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**Group → Businesses** lists every business the group runs. Open one to change:

- **The basics**: its short name ("Property"), its brand name if it has one ("Kestrel Homes"), the year it started, what it does in a few words, and its tags.
- **Its page**: the heading, the intro (the "Excerpt"), its photo (the featured image), facts and figures, the steps of how it works, and its own menu. Words between `*stars*` show in the accent colour; words between `_underscores_` in italics.
- **Contact**: its phone, email, and the inbox its enquiries go to, who answers ("the Property team"), how fast ("within a working day"), and the question the contact form asks ("Are you a landlord, tenant or buyer?"). You can add "who's asking" choices, one per line, each with its own question, example and (optionally) its own inbox:

Landlord | How many properties, and where? | 2 flats in Headingley |  
landlords@yourgroup.com

- **Brand kit (Pro)**: its colour, heading font, corners, mark and logo, used when each business shows its own brand (Group → Settings → Group → Display mode). If the colour you choose wouldn't keep text readable, the website uses a deeper shade automatically.
- **Hide from the website** takes it off the menu, the homepage and the contact form without deleting anything.

To add a business: **Add New**, or run the setup wizard again (**Group → Settings → Run setup again**) and click **Add another business**. It appears on the homepage, in the menu's "Our businesses" list and in the contact form straight away.

**Services** (Group → Services), **the team** (Group → Team) and **testimonials** each have a **Business** box: tick the business (people can be in several, or none for head office). News posts have a **Business** box too, so each business page shows its own news.

## 4. Enquiries

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Visitors choose which business their message is about (or **Not sure**), answer that business's question, and the message goes straight to that business's inbox (or a "who's asking" choice's inbox). "Not sure" goes to the group office: the addresses under **Group → Settings → Email → Send "Not sure" enquiries to**.

**Group → Enquiries** keeps every one:

- Filter by business, status or kind (enquiry, listing, client request) and search.
- Open one to **assign** it to someone, change its **status** (New, Replied, In progress, Won, Closed), add **private notes**, or **reply by email** from the website. Replies to clients also appear in their client area.
- **Download CSV** for a spreadsheet.

## 5. Listings

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**Group → Listings** holds homes to let and for sale, commercial units, or anything a business offers. Each listing has a type, status, price (and "per month", "per year"...), address and area, bedrooms and size, features, photos (add a Gallery block to its content) and documents (brochure, floor plan, EPC).

- Change a status straight from the list: the **Status** drop-down saves as soon as you choose.
- Visitors filter the listings page by type, area, bedrooms and price, and each listing has its own enquiry form for the right team.
- The types are yours: **Group → Settings → Listings** (one per line, `code | name | unit`).

## 6. Stock & equipment (Pro)

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**Group → Stock & equipment** is for businesses that run stock or machines (tick **Stock and equipment** on the business).

- **Products** (with categories and suppliers) and **stock items**: one per product per place (warehouse, van...), each with the level to reorder at.

- **Record a movement** on a stock item: **Delivery** in, **Out** (sold, used, damaged), **Transfer** to another place, **Count** (what's really there) or **Restock** into a machine. Each one records who, when and why. Stock can never go below zero: if two people record at the same time, the second is told there aren't enough.
- **Machines**: serial number, model, status, the client's site, how often it's serviced, and what it holds (capacity and low level per product). **Service visits** set the next service date.
- **Restock tasks**: "Make a restock task" fills a machine to capacity from what's low. Give it to someone (they get an email); **Mark it done** takes everything from stock and puts it in the machine, all or nothing.
- **Activity** shows every change. Lists have search, filters and **Download CSV**.
- A daily email lists what's running low (**Group → Settings → Stock & equipment**).

## 7. Clients (Pro)

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**Group → Clients** lists your client accounts (companies), each served by one or more businesses.

- **Open a client** to see everything in one place: their orders, plans, sites and machines, documents, sign-ins and requests.
- **Orders**: add the lines ( what | how many | £price | VAT % ), the status (Quote, Confirmed, In progress, Delivered) and a line on progress ("Installation booked for Thursday"); tick **Email the client** to tell them. **Record a payment** for money taken by card, cash or transfer. Shop orders from WooCommerce show here too: choose the client in the order's **Client account** box.
- **Invoices and receipts** open as printable pages with the business's name under the parent company's details (company number, VAT number, registered office). They're records of what was ordered and paid: keep using your accounting software for your books and VAT.
- **Plans and renewals**: service plans, rentals, leases and maintenance contracts with their price and renewal date. You're emailed before each renewal; click **Renewed** once it's agreed to move the date on. (Payments aren't taken automatically.)
- **Documents**: upload contracts, tenancy agreements or reports for the client (PDF, photos, Word, Excel). Only that client and your staff can open them.
- **Sign-ins**: invite the client's people by email. They sign in at **My account** with a password or an emailed link, and only ever see their own company.

### What your clients see (My account)

Their orders from every business with progress and invoices, their plans and renewal dates, their sites and machines with service visits, their documents, and **Requests**: they can ask about an order, for help, for a restock or a service visit. A request goes to the right business as an enquiry (a restock also makes a restock task), and your replies appear under **Messages**.

## 8. Who sees what (Pro)

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- **Group admin:** everything.
- **Business manager:** their businesses' pages, services, listings, enquiries, stock, machines and clients.
- **Business staff:** their businesses' enquiries and day-to-day stock.

Tick the businesses each person looks after under **Group → Staff by business** (or on their profile). Someone with nothing ticked sees no business until you tick one. A person who looks after Property never sees Vending's stock, orders or documents, and the other way round. **Staff access** changes what each role can do.

## 9. Design

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**Site Settings → Design & colours:** choose **Mosaic**, **Charter** or **Parallel** and one of its seven palettes, and preview before visitors see it. **Group → Settings → Group → Display mode:** one brand for the whole group, or (Pro) each business in its own colours, font and logo; **Preview on the website** shows either choice first.

## 10. Getting help

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Email [support@thegradespace.com](mailto:support@thegradespace.com) with what you were doing, what you expected and a screenshot.