



# Modernize – administrator quick guide

English translation of `adminisztratori-gyorsutmutato.md`.

**Current application version:** 1.1.1.

This guide is for day-to-day admin use. The admin interface address is `/{{locale}}/admin`, for example `/hu/admin`. Only a signed-in user with the `ADMIN` role can open it.

## First sign-in and navigation

1. Open `/hu/login` and sign in with the admin email address.
2. Go to the **Admin** interface. On mobile, the menu button at the top left opens the sidebar.
3. The **New booking** button opens manual booking from anywhere.
4. Sign out with the profile button at the top right.
5. The HU/EN language switcher changes language while staying on the current page.

A new email/password account is created only when the one-hour verification link is opened. If the email does not arrive, it can be resent from the verification page. **Forgot password** replaces a credential customer's password with a temporary password sent by email and signs out existing sessions; a Google-only account must still use Google sign-in.

Recommended order for first use: Storefront → Categories → Services → Availability → Settings → a test booking.

## What may be missing on a deployment

The operator can turn whole features off with environment flags ( `FEATURE_*` ). The admin interface cannot turn them back on. When they are off:

- the **Waitlist** menu item disappears ( `FEATURE_WAITLIST=false` ); a full public day does not offer a waitlist, and an old claim link does not book;
- the **Promo codes** menu item disappears ( `FEATURE_PROMO_CODES=false` ); the direct address does not open, and checkout does not ask for a code;
- on **Settings**, the booking-email controls ( `FEATURE_EMAIL_NOTIFICATIONS` ), SMS ( `FEATURE_SMS` ), Google Calendar ( `FEATURE_GOOGLE_CALENDAR` ), and on-premise approval ( `FEATURE_ON_PREMISE_APPROVAL` ) appear only beside their own switch;
- the **Storefront** Google Maps field and the public map appear only when `FEATURE_GOOGLE_MAPS_EMBED` is on;
- prepaid checkout and Stripe refunds start only when `FEATURE_ONLINE_PAYMENT` is on. The refund list can still be opened.

The detailed table is in the **Deployment feature flags** section of the application overview. The account-verification email, the temporary password, and the GDPR data-export email can still go out independently of the booking-email switch.



## Date and time fields

Admin date and time fields follow the interface language:

- on the Hungarian interface, date `yyyy. mm. dd.` and 24-hour `hh:mm` (for example `2026. 09. 20. 14:30`);
- on the English interface, date `mm/dd/yyyy` and 12-hour `hh:mm AM/PM` (for example `09/20/2026, 2:30 PM`).

The icon at the right edge of the field opens the calendar or the hour/minute picker; typing is also allowed, and the entered value is reformatted as above when you leave the field. If the date or time cannot be interpreted, the message "Enter a valid date or time." appears under the field until it is corrected. An optional field can be cleared with the **Clear** link in the picker. On save, the system always submits a canonical value and interprets it in the business's configured timezone, so switching language does not change the stored time. This behavior applies to availability rules, blackouts, promo code periods, and the analytics custom range.

## Dashboard

The **Dashboard** is a quick view of the day's state: booking metrics, upcoming appointments, and setup warnings. Open the detailed list from here when a number or a warning needs checking. The metrics come from the database; the analytics period is chosen on the **Analytics** page.

## Bookings and calendar

### Bookings

On **Bookings** you can search, filter by status, category, service, and date, change the page size, then open the detail page from a row. After filtering, check the active filters before assuming a booking is missing. Page sizes are 10, 20, 50, 100, and 200 rows.

The booking detail page shows:

- the customer, service, time, price, discount, deposit, and payment status;
- answers to custom questions and time-limited private file links;
- status history, notification history, and Google Calendar sync status.

Depending on status, the admin can:

- approve or deny a booking that is waiting for approval;
- reschedule it to a new free time;
- cancel with a reason, and also choose a refund for an eligible Stripe payment;
- start an admin refund directly for an eligible payment;
- retry a failed booking notification;
- set an appointment that has already ended to **Completed** or **No-show**.

Do not use a status change in place of a note: choose only the action that matches the real event. The system logs every change.



## Manual booking

On **New booking**, choose a service and a free time, and enter the customer's name, email address, and optional phone number. You can decide whether to send a confirmation email. A time outside opening hours can be recorded only with a separate permission; capacity and overlap protection still apply.

## Calendar

**Calendar** shows bookings in time order, in day and week views. Use it for daily organization, then open the booking detail page for a detailed change. Displayed times always follow the business's configured timezone.

The **Today** button next to the view switcher returns to today from any week. Two indicators can appear on an entry:

- a capacity indicator ( `bookings/capacity` ) when more than one booking falls on the same service and start; the tooltip calls out a full capacity separately;
- an **Overlap** indicator when the booking, including buffer times, overlaps another booking that is not the same service–start pair.

The overlap indicator can also appear after a manual booking or a later buffer-time change: in that case, check whether the two appointments can actually be fulfilled.

## Catalog

### Categories

Create a category with a name, an optional slug, an order, and visibility. A lower order value appears first. A category that is in use cannot be deleted; first move, or delete or deactivate, the services that belong to it.

### Services

For a new service, set:

- category, name, slug, description, image, order, and active state;
- price, optional deposit, and **on-premise** or **prepaid** mode;
- duration, before/after buffer, and the capacity allowed for one start time;
- the customer's cancellation deadline and reminder times.

The slug is part of the public `/hu/book/<slug>` address, and it can also be edited in the editor. Leave it empty to generate it from the English title; the system turns the entered value into a URL-safe slug automatically (no accents, lowercase). After save, the interface moves to the new address, and **the previous public URL is no longer available** — change a slug only if the old link is not advertised anywhere. The system rejects a slug that is already in use.

An inactive service disappears from the public catalog, but earlier bookings remain. Do not delete a service that has bookings; turn off the active state to archive it.



Custom customer fields can be added in the service editor: text, number, dropdown, or private file. Set the label, whether it is required, the options, and the order. After a change, try the public booking form.

## Operations

### Availability

First record the general weekly opening hours, then only the category or service exceptions you need. Several time blocks can be given for one day. A more specific rule **replaces** the more general one; it does not add to it.

For a one-off closure, create a blackout with a start, an end, and a reason. Time-block and blackout fields use the language format described in **Date and time fields**. After a change, check the public calendar of an affected service.

### Waitlist

On **Waitlist**, follow by status who is waiting for which service on which day. The system automatically notifies the first eligible person, then moves on after expiry. The statuses are active, notified, booked, expired, and cancelled. Do not manually promise a place to someone who does not yet have a valid offer.

### Promo codes

Enter the code, the percentage or fixed discount, the optional period, the total and per-customer limits, and the affected services. An empty service list means every service. The period start and end fields use the language format in **Date and time fields**, and they are understood in the business timezone. After saving, try the code on the public checkout; deactivating can be safer than deleting.

## Customers and refunds

### Guests

**Guests** shows customer data and a summary of booking history. Open the booking itself for detailed appointment management. Use customer data only for a business or support purpose, and do not export it without a reason.

### Refunds

In the **Refunds** queue, first check the booking, the payment, the amount, and the customer's reason. Approval starts a Stripe refund; denial requires an admin note. After a processing error, do not click again blindly: look at the Stripe status first, so a faulty repeat is avoided.

A refund can come from a customer request, an admin action started on the booking detail page, an admin cancellation, or an automatic system process. Automatic refunds left in an uncertain state are retried by a scheduled process; always reconcile the Stripe status before a manual intervention.

A request that is permanently **Failed** ( **FAILED** ) — and that does not yet have a Stripe refund identifier — can also be restarted manually by the admin with the "Retry refund" button. The row



shows the attempt count, the time of the last attempt, and a Stripe-classified, admin-readable failure reason (for example "PaymentIntent not found", "already refunded", "not refundable"). The PaymentIntent identifier links directly to the Stripe Dashboard (with a URL for test or live mode), so the Stripe status can be checked quickly before a retry.

A payment that arrives after the hold expires confirms the booking only if the service still has free capacity. If another booking already uses the place, the system sets the booking to expired and queues an automatic refund.

## Operations health and analytics

The **Operations health** page shows four groups of signals that may need manual attention:

- notifications that failed, or that were attempted at least once and have been stalled for more than ten minutes;
- bookings that Stripe has paid but that are still `PENDING_PAYMENT` ;
- failed or unfinished automatic refunds, with the errors shown;
- the last successful run and the freshness of all seven cron jobs.

From the page, open the affected booking or refund. Resend only notifications that are tied to a booking and can be retried; if a payment is uncertain, reconcile the Stripe status first. The dashboard warning count is built from the same signals.

## Analytics

Choose a date range on **Analytics**: a preset period, or your own start and end date. If either date is missing, or the start is later than the end, **Apply** reports an error and the view stays unchanged. The view shows confirmations, cancellations, no-shows, revenue, deposits, rebooking rate, a time trend, and performance per service. Amounts are in the currency and price snapshot stored at booking time; check the period and the timezone before a report.

## Storefront and branding

On **Storefront** you can edit the company name, seven brand colors, the logo, the banner, one optional gallery image, language, currency, timezone, contact details, social links, the Google Maps embed URL (the iframe `src` from "Embed a map"), and the waitlist offer duration. On the public page the map iframe loads only after the visitor consents (the same gate is in the admin preview).

In the preview on the right, switch between desktop and mobile. Media uploads save separately; use **Save** for the other fields. Then open the public page as well, because the preview does not replace a full check. The gallery section appears only when a gallery image has been uploaded.

On **Legal documents** you can edit the Hungarian and English privacy notice and terms separately. The Markdown preview on the right uses the same safe formatting as the public page. Every publish goes live immediately, creates a revision history, and an earlier version can be restored after a preview; restoring also creates a new history entry. Publish only content a lawyer has approved. Custom SEO JSON remains an operator setting.



## Settings

On `/hu/admin/settings`:

- Google Calendar can be connected or disconnected, and a writable calendar can be selected;
- SMS can be turned on if Twilio is already configured at deployment level;
- the admin booking-notification mailbox can be set; it is separate from the public contact email. After save, a test email can also be queued;
- on-premise bookings can be required to wait for admin approval;
- a non-negative VAT rate can be set (before save, the default is 27% on the Hungarian interface and 20% on the English interface); the change affects only the price snapshot of new bookings;
- business contact details can be updated;
- GDPR erasure/anonymization can be carried out by email address;
- restriction requests under Article 18 and objection requests under Article 21 can be recorded and handled by email address (Finding 23 / GDPR 1.1.0 #346).

Do not advertise the booking interface as a product for children under 16 (Finding 22). Self-service use by people under 16 is outside the product audience, so there is no age gate. A service aimed at children (for example a children's haircut) can still be booked by an adult.

Requests from guests without an account go to the contact email address configured in StorefrontConfig and shown on the public privacy page. Answer requests without undue delay, and within one calendar month at the latest. The public privacy page shows both the guest email request path and the signed-in `/hu/profile#export` / `/hu/profile#delete` links.

Restriction and objection requests: on **Settings**, record the email address, the request type, and the note. The statuses are received → in progress → applied or rejected; an applied request can be lifted. Every change is logged. When a request is applied, the system does not send waitlist notifications to that address; booking confirmations, reminders, and refund notifications still go out because they are needed to perform the contract. Judging a rejection is the operator's responsibility; the application does not give legal advice.

The GDPR action is permanent: check the email address and the customer's request, and only then tick the confirmation. An admin account cannot be deleted this way. Successful erasure, and admin views of the booking list/detail, guests, waitlist, calendar, refunds, and dashboard that contain PII, write an `AdminPiiAccessLog` entry (GDPR Finding 24 / #346). The log is metadata only (actor, action, resource identifier or hashed email, outcome, UTC time); a raw name, email, or phone number is not stored. The operator reads the table in the database; the application does not offer a delete or edit API.

For a future booking, the system may keep the customer data needed for fulfilment until the booking ends, while private files are deleted. If the guest also wants the booking cancelled, handle the cancellation on the booking interface first, then run the erasure request at the appropriate time.

The daily `retention-cleanup` job anonymizes contact data of ended bookings after 24 months; the booking row and analytics remain, and the user account is not deleted.

The application does not itself delete Stripe, Google Calendar, and (if enabled) Sentry copies. The operator carries out the processor steps according to the GDPR erasure runbook in `app-`



documents/devops-telepitesi-es-uzemeltetesi-utmutato.md . The current subprocessor list is in the internal DPA package app-documents/gdpr-internal-dpa-subprocessor-package.md (Finding 25).

The /hu/admin/billing page is a presentation-only invoicing layout: it does not issue an invoice and does not manage a subscription. The working VAT setting is on /hu/admin/settings .

Signed-in customers manage their own data, password, GDPR data export, and account deletion on /{locale}/profile . That is a separate process from the admin GDPR erasure started by email address.

## Daily checklist

1. Review the dashboard warnings and today's calendar.
2. Process bookings waiting for approval, and refunds.
3. Check failed notifications and calendar syncs on the bookings.
4. Review the waitlist and upcoming blackouts.
5. After every important change, try the affected public flow.

If a payment, notification, permission, or privacy error cannot be resolved from the admin interface, do not repeat the action without a limit: note the booking identifier, the time, and the error message, then report it to the operator.