# Trading Toolkit
# Handover & Onboarding Guide

**Document Purpose:** Comprehensive guide for content editors to manage and update the Trading Toolkit web application.

**Intended Audience:** Marketing and content teams responsible for campaign content updates.

**Last Updated:** 26 January 2026

**Owner/Contact:** [Your Name/Team]

# Table of Contents

# 1. Introduction

## 1.1 What is the Trading Toolkit?

The Trading Toolkit is a web-based platform designed to centralise campaign information, activation strategies, customer touchpoints, and marketing resources. It provides a single source of truth for campaign teams globally, allowing them to view campaign details, explore customer journeys, access marketing assets, and understand omnichannel strategies.

The toolkit consists of:

- Public-facing pages that display campaign information (read-only for most users)
- Admin panel for authorised users to update content, add resources, and manage campaign data

## 1.2 Who is this guide for?

This guide is intended for:

- Content editors who need to update campaign information, add new resources, or modify existing content
- Marketing coordinators managing campaign rollouts across regions
- New team members being onboarded to the Trading Toolkit system

You do not need technical expertise or coding knowledge to use this guide. All tasks are performed through the web interface.

## 1.3 How to use this guide

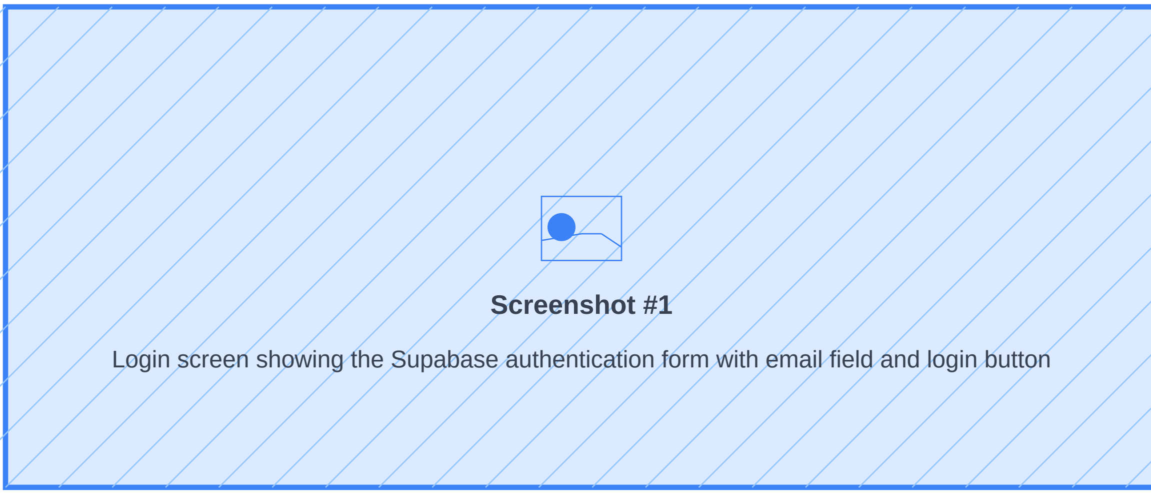
- **If you're new:** Start with Section 2 (Accessing the System) and Section 5 (Quick Start Checklist)
- **If you need to update specific content:** Jump to Section 4 (Admin Panel) and find the relevant subsection
- **If something isn't working:** Check Section 6 (Troubleshooting)
- **For quick reference:** Use the Table of Contents to navigate directly to the section you need

**Tip:**

# 2. Accessing the System

## 2.1 Logging in (front-end view)

**URL:** http://localhost:5173 (local development)



**Screenshot #1**

Login screen showing the Supabase authentication form with email field and login button

**Steps:**

1. Open your web browser and navigate to the URL above
2. Use the usual Trading Toolkit login method (Supabase authentication)
3. Enter your credentials: Email (your authorised email address) and Password
4. Click Log In or Sign In
5. You will be taken to the home page

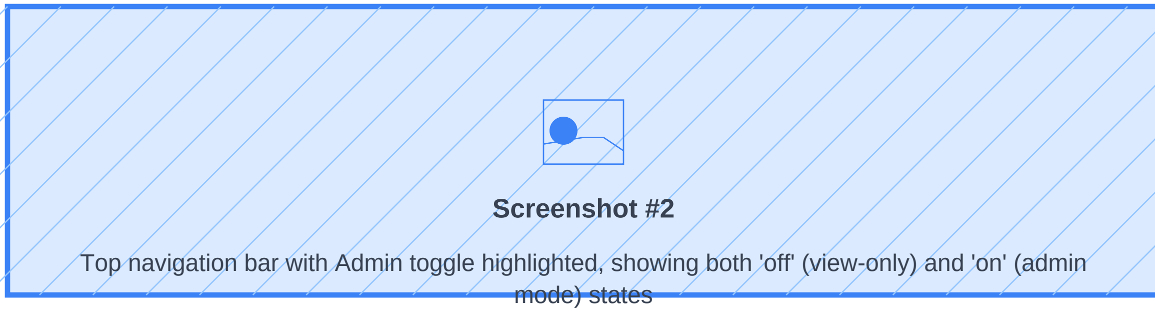
> **Note:**
>
> If you see a login error, check that you are using the correct credentials. Contact your system

## 2.2 Accessing the Admin panel

Once logged in, you can toggle into Admin mode:

**Steps:**

1. Look for the Admin toggle in the top navigation bar (usually top-right corner)
2. Click the toggle to switch to Admin mode
3. You will see additional navigation options appear, including a link to /admin
4. Click Admin in the navigation to open the Admin panel



**Screenshot #2**

Top navigation bar with Admin toggle highlighted, showing both 'off' (view-only) and 'on' (admin mode) states

**URL when in Admin panel:** http://localhost:5173/admin

## 2.3 User roles and permissions

The Trading Toolkit uses two main access levels:

| Role | Access Level | What You Can Do |
|---|---|---|
| Standard User | View-only | Browse all front-end pages, view campaign information, click through to external resource |
| Admin | Edit access | All of the above, plus: add/edit/delete content in the Admin panel, manage campaigns, up |

**Tip:**

If you cannot see the Admin toggle, you may not have admin permissions. Contact your system

# 3. Front-End Pages (View-Only)

This section explains what each front-end page displays and how content is controlled. You cannot edit content directly on these pages. All edits must be made through the Admin panel (Section 4).

## 3.1 Home / Overview

**What this page shows:** The home page displays the current campaign overview, including:

- Campaign hero image
- Campaign name and year (e.g., '2026 Global campaign')
- Scope, channels, and activation dates
- Quick links to other sections (Customer Touchpoints, Insights, Activate, Omnichannel, Calendar, Resources)

**How content is controlled:**

- Campaign metadata (name, year, hero image, scope, channels, activation dates) is managed in Admin > Campaign (see Section 4.2)
- Quick links are hardcoded and cannot be edited through the Admin panel

**Screenshot #4**

Home page showing the campaign hero card with title 'Campaign Toolkit', hero image, scope/channels/dates, and link buttons to other sections

**Note:**

If the campaign information does not appear, check that the api.getCampaign() function is

## 3.2 Customer Touchpoints

**What this page shows:** The Customer Touchpoints page displays an interactive accordion list of platforms (e.g., Web, App, Email, Social) with expandable sections showing:

- A screenshot of the platform
- Numbered markers on the screenshot indicating specific touchpoints

- Descriptions of each touchpoint, including: Title, Description, Tier badges (Executive, Premium, Standard), 'New' badge (if applicable), Copy ideas (expandable)

**How content is controlled:**

- Platforms and touchpoints are managed in Admin > Touchpoints (see Section 4.6)
- Screenshots are stored as URLs in the platforms table
- Marker positions are stored as JSON data in the touchpoints table

**Screenshot #5**

Customer Touchpoints page with the 'Web' platform expanded, showing screenshot with numbered markers on the left and touchpoint descriptions on the right

**What you can do:**

- Click on a platform name to expand/collapse its touchpoints
- Scroll through the touchpoint descriptions
- Click 'Copy Ideas' to expand suggested copy text

**What you cannot do:**

- Edit touchpoint text directly on this page (use Admin panel instead)
- Rearrange the order of platforms or touchpoints (use Admin panel to update sort_order)

## 3.3 Insights

**What this page shows:** The Insights page displays campaign performance data and market insights, including:

- Page title and subtitle (e.g., 'Insights & Performance' and 'Summer Season Insights')
- Infographic cards showing: Europe's most popular summer flights, Route statistics, Passenger data charts

**How content is controlled:**

- Title and subtitle only are admin-controlled via Admin > Insight Pages (see Section 4.8)
- All infographic cards, charts, and data are currently hardcoded and cannot be edited through the Admin panel

**Screenshot #6**

Insights page header showing the title 'Insights & Performance' and subtitle, followed by the bento grid of infographic cards

**Warning:**

At present, only the title and subtitle can be customised per campaign. The rest of the page

## 3.4 Activate (Ways of Working)

**What this page shows:** The Activate page displays a step-by-step workflow for campaign activation, including:

- Numbered workflow steps (e.g., '1. Brief & Ideation', '2. Creative Development')
- Title and description for each step
- Visual step indicators

**How content is controlled:**

- Workflow steps are managed in Admin > Ways of Working (see Section 4.3)
- You can add, edit, reorder, or delete steps

**Screenshot #7**

Activate page showing the workflow steps in a vertical timeline with numbered cards and step descriptions

## 3.5 Omnichannel

**What this page shows:** The Omnichannel page displays:

- A 360° activation strategy grid showing channels arranged in a circle around a central info card (e.g., Web, App, Email, Social, Paid Social, Loyalty, In-store)
- A horizontal carousel of 'Summer Joy Ideas' cards with: Image, Tag (e.g., 'Engagement', 'Elegant'), Title, Description

**How content is controlled:**

- The 360° strategy grid is managed in Admin > Omnichannel (see Section 4.4)
- The Summer Joy Ideas carousel is managed in Admin > Omnichannel Ideas (see Section 4.5)

**Screenshot #8**

Omnichannel page showing the 360° strategy grid at the top, and the 'Summer Joy Ideas' carousel below with 3-4 visible cards

## 3.6 Calendar

**What this page shows:** The Calendar page displays a timeline view of campaign milestones and key dates.

**How content is controlled:**

- Currently view-only. No admin interface exists yet for editing calendar events.
- Calendar data may be hardcoded or pulled from a future database table.

**Screenshot #10**

Calendar page showing the timeline grid with campaign milestones and dates

> **Note:**
> If you need to update calendar content, contact your system administrator or development team.

## 3.7 Resources

**What this page shows:** The Resources page displays a grid of downloadable assets and external links, including:

- Thumbnail image
- Category badge (e.g., 'Visual Assets', 'Copy & Messaging')
- Title and Description
- CTA button (e.g., 'View Resource', 'Download')

**How content is controlled:**

- Resource cards are managed in Admin > Resources (see Section 4.7)
- Cards link to external URLs (e.g., Canopy, Figma, Google Drive)

**Screenshot #11**

Resources page showing a grid of resource cards, each with a thumbnail, category badge, title, description, and 'View Resource' button

**What you can do:**

- Click on a resource card or button to open the external link in a new tab

**What you cannot do:**

- Edit resource details directly on this page (use Admin panel instead)
- Upload files directly to the toolkit (resources must be hosted externally and linked via URL)

# 4. Admin Panel - Content Management

This section provides step-by-step instructions for managing content in the Admin panel.

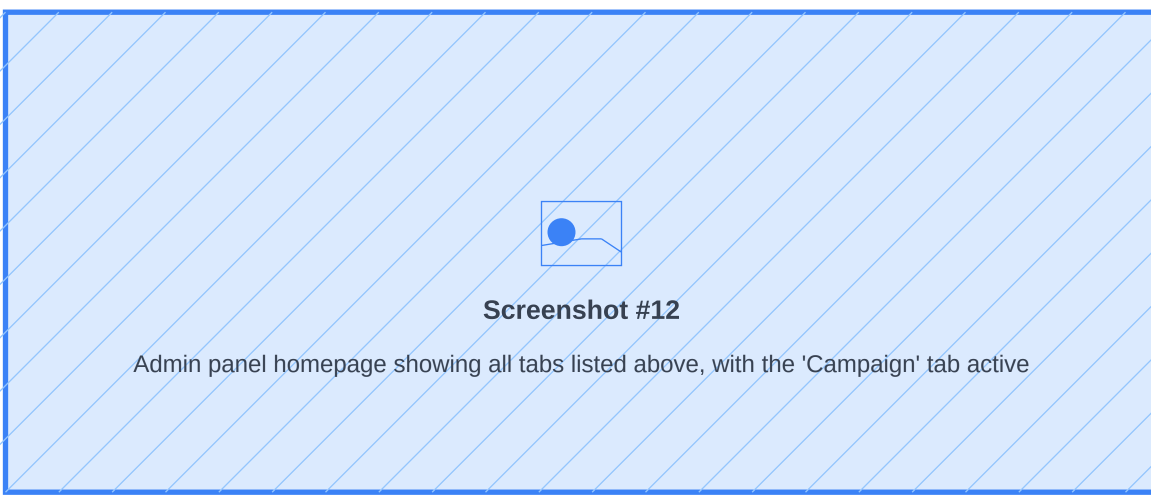
> **Warning:**
> Before you begin: Make sure you are logged in and have toggled into Admin mode (see Section

## 4.1 Overview of the Admin Panel

**URL:** http://localhost:5173/admin

**What this page shows:** The Admin panel contains multiple tabs, each corresponding to a different content area:

| Tab | What It Controls |
|---|---|
| Campaign | Campaign name, year, hero image, scope, channels, activation dates |
| Ways of Working | Workflow steps for campaign activation |
| Omnichannel | 360° strategy grid channels |
| Omnichannel Ideas | Summer Joy Ideas carousel cards |
| Touchpoints | Customer Touchpoints platforms and touchpoint descriptions |
| Resources | Resource cards (external links and downloads) |
| Insight Pages | Insights page title and subtitle per campaign |




**How to navigate:**

1. Click on any tab name to open that content area
2. You will see a list view of existing entries (e.g., all resources, all touchpoints)
3. Use the Add New button (usually top-right) to create a new entry
4. Click Edit on any existing entry to modify it
5. Click Delete to remove an entry (use with caution)

**Tip:**

Always refresh the front-end page after making changes in the Admin panel to see your updates.

## 4.2 Campaign Metadata

**What this section controls:** Campaign-level information displayed on the home page, including:

- Campaign name
- Year
- Hero image URL
- Scope (e.g., 'Global', 'EMEA')
- Channels (e.g., 'Omnichannel, Digital, In-store')
- Activation dates

### How to edit campaign details

**Steps:**

1. Go to Admin > Campaign
2. You will see a list of existing campaigns (e.g., holiday-season-2025, campaign-2026)
3. Click Edit next to the campaign you want to update
4. A modal or form will appear with editable fields
5. Update the fields as needed (see field reference table below)
6. Click Save or Update
7. Refresh the home page to see your changes

**Screenshot #13**

Admin > Campaign list view showing two campaigns with 'Edit' and 'Delete' buttons

**Screenshot #14**

Campaign edit modal showing all editable fields (name, year, hero_image_url, scope, channels, activation_dates)

## Field reference

| Field Name | What It Controls | Example | Notes |
|---|---|---|---|
| id | Unique campaign identifier | campaign-2026 | Do not edit. Used internally. |
| name | Campaign display name | Summer Joy 2026 | Appears on the home page hero card. |
| year | Campaign year | 2026 | Displayed as "2026 Global campaign". |
| hero_image_url | Hero image URL | https://example.com/hero.jpg | Must be a full URL (include https://). Recommended: 1200x6 |
| scope | Campaign scope | Global | Freeform text (e.g., "Global", "EMEA"). |
| channels | Channels covered | Omnichannel, Digital, In-store | Comma-separated list. |
| activation_dates | Date range | June - August 2026 | Freeform text. |

## Image guidance

Hero images should be:

- Format: JPG or PNG
- Recommended dimensions: 1200px width x 600px height (2:1 aspect ratio)
- File size: Under 500KB for optimal performance
- Hosted externally: Upload to your image hosting service (e.g., Cloudinary, AWS S3) and paste the full URL

**Warning:**

Common mistake: Pasting a local file path (e.g., /Users/name/image.jpg) instead of a URL. Always

## Tips and warnings

**Tip:**

Test your hero image URL by pasting it into a browser address bar. If the image loads, the URL is

**Warning:**

Do not change the id field unless you are creating a new campaign. Changing an existing campaign's id will break links to Insight Pages, Resources, and Omnichannel Ideas tied to that

## 4.3 Ways of Working

**What this section controls:** The workflow steps displayed on the Activate page.

### How to add a new workflow step

**Steps:**

1. Go to Admin > Ways of Working
2. Click Add New Step (or Add New)
3. Fill in the following fields: Title, Description, Sort Order, Campaign ID
4. Click Save or Create
5. Refresh the Activate page to see your new step

**Screenshot #16**

Admin > Ways of Working 'Add New Step' modal showing all fields (title, description, sort_order, campaign_id)

### How to reorder workflow steps

**Steps:**

1. Edit the step you want to move
2. Change the Sort Order field to the desired position number
3. Click Save
4. If needed, edit other steps to adjust their sort order accordingly

**Tip:**

Use increments of 10 (e.g., 10, 20, 30) for sort order. This makes it easier to insert new steps in

### Field reference

| Field Name | What It Controls | Example | Notes |
|---|---|---|---|
| title | Step name | Brief & Ideation | Displayed as the step heading. |
| description | Step explanation | Collaborate with stakeholders... | Supports multi-line text. |

| Field Name | What It Controls | Example | Notes |
|---|---|---|---|
| sort_order | Step position | 10 | Lower numbers appear first. |
| campaign_id | Linked campaign | campaign-2026 | Must match an existing campaign id. |

## Common mistakes

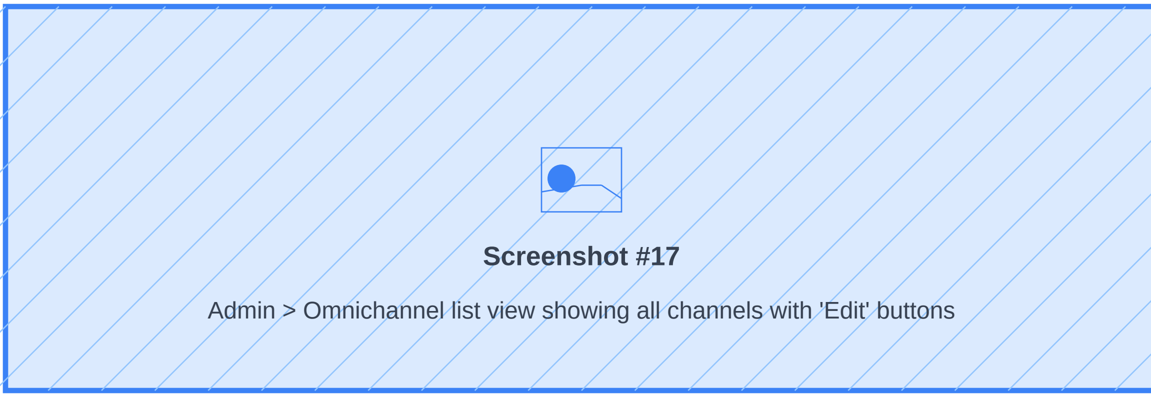
- **Duplicate sort order:** If two steps have the same sort order, the display order may be unpredictable. Make sure each step has a unique number.
- **Wrong campaign ID:** If you enter a campaign name (e.g., 'Summer Joy 2026') instead of the campaign ID (e.g., campaign-2026), the step will not appear on the front-end.

## 4.4 Omnichannel Strategy

**What this section controls:** The 360° activation strategy grid on the Omnichannel page, showing channels arranged in a circle (e.g., Web, App, Email, Social, Paid Social, Loyalty, In-store).

### How to edit existing channels

1. Go to Admin > Omnichannel
2. You will see a list of channels (e.g., 'Web', 'App', 'Email')
3. Click Edit next to the channel you want to update
4. Update the Channel name and Description fields
5. Click Save or Update



**Screenshot #17**

Admin > Omnichannel list view showing all channels with 'Edit' buttons

### Field reference

| Field Name | What It Controls | Example | Notes |
|---|---|---|---|
| id | Auto-generated ID | 01 | Do not edit. Used for positioning. |
| channel | Channel name | Web | Displayed as the card title. |
| description | Channel explanation | Driving awareness through our website. | Displayed below the channel name. |
| color | Card accent colour | blue | Options: blue, green, purple, orange, red, indigo, pi |

**Tip:**

The 360° grid is designed for exactly 7 channels. Adding or removing channels may require layout

## 4.5 Omnichannel Ideas

**What this section controls:** The 'Summer Joy Ideas' carousel on the Omnichannel page, displaying creative activation ideas with images, tags, titles, and descriptions.

### How to add a new idea card

1. Go to Admin > Omnichannel Ideas

2. Click Add New Idea (or Add New)
3. Fill in the following fields: Title, Description, Image URL, Tag, Sort Order, Is Active, Campaign ID
4. Click Save or Create
5. Refresh the Omnichannel page to see your new card in the carousel

**Screenshot #19**

Admin > Omnichannel Ideas 'Add New Idea' modal showing all fields

## How to hide/show idea cards

1. Go to Admin > Omnichannel Ideas
2. Find the idea you want to hide or show
3. Click Edit
4. Toggle the Is Active field: Active (checked) = Card appears; Inactive (unchecked) = Card hidden
5. Click Save

**Tip:**

## Field reference

| Field Name | What It Controls | Example |
|---|---|---|
| title | Idea name | Tasting Bar Illusion |
| description | Idea explanation | Engage curious minds with the "Impossible Cups" puzzle. |
| image_url | Card image URL | https://example.com/tasting.png |
| tag | Optional badge | Engagement |
| sort_order | Position in carousel | 20 |
| is_active | Visibility toggle | true or false |

| Field Name | What It Controls | Example |
|---|---|---|
| campaign_id | Linked campaign | campaign-2026 |

## 4.6 Customer Touchpoints (Platforms & Touchpoints)

**What this section controls:** The Customer Touchpoints page, including:

- Platforms: The main categories (e.g., Web, App, Email, Social)
- Touchpoints: The individual features/elements within each platform
- Marker positions: The numbered markers overlaid on platform screenshots

> **Warning:**
>
> This is the most complex admin section. Take care when editing marker positions, as incorrect

### How platforms and touchpoints relate

Each **platform** (e.g., 'Web') has: a name, a platform type, and a screenshot URL.

Each **touchpoint** belongs to a platform and has: a title, description, tier badges, a marker number, marker position data (JSON format), and optional copy ideas.

### How marker positions work

Each touchpoint can have one or more markers displayed on the platform screenshot. The marker position is stored as JSON data in the following format:

```
[{"top": "120px", "left": "50%"}]
```

- **top:** Vertical position from the top of the screenshot (e.g., 120px, 15%)
- **left:** Horizontal position from the left of the screenshot (e.g., 50%, 200px)

> **Warning:**
>
> Incorrect marker positions can cause markers to appear off-screen or in the wrong location. Always

> **Tip:**
>
> Use percentage values (e.g., 50%) for horizontal positioning to ensure the marker scales correctly on different screen sizes. Use pixel values (e.g., 120px) for vertical positioning for more precise

**Screenshot #21**

Admin > Touchpoints 'Add New Touchpoint' modal showing all fields including marker_positions JSON field

## Field reference

| Field Name | What It Controls | Example |
|---|---|---|
| platform | Which platform this touchpoint belongs to | Web |
| title | Touchpoint heading | Homepage Hero Banner |
| description | Touchpoint explanation | Eye-catching hero image with CTA. |
| tier_executive | Executive tier badge | true or false |
| tier_premium | Premium tier badge | true or false |
| tier_standard | Standard tier badge | true or false |
| is_new | New badge | true or false |
| copy_ideas | Suggested copy text | ["Get inspired", "Explore now"] |
| sort_order | Position within platform | 10 |
| marker_positions | Marker location data | [{"top": "120px", "left": "50%"}] |

## What NOT to break

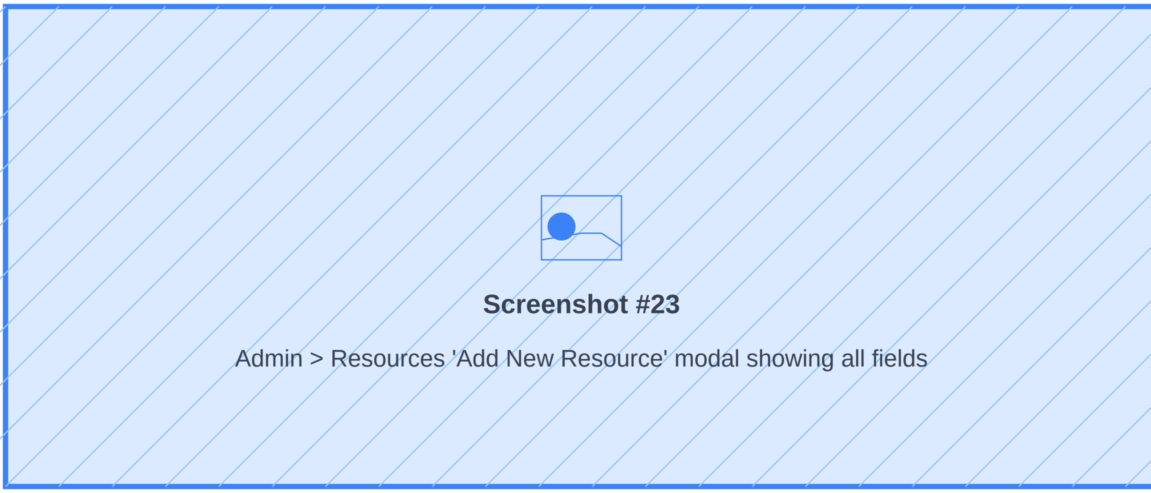
- **Do not delete platforms** that have existing touchpoints. Delete the touchpoints first.
- **Do not change platform names** without updating all associated touchpoints.
- **Do not delete all marker positions** for a touchpoint. The numbered marker will not appear.

## 4.7 Resources

**What this section controls:** The resource cards displayed on the Resources page, each linking to an external asset (e.g., Canopy, Figma, Google Drive).

### How to add a new resource card

1. Go to Admin > Resources
2. Click Add New Resource (or Add New)
3. Fill in the following fields: Title, Category, Description, Thumbnail URL, CTA Label, CTA URL, Sort Order, Active, Campaign ID
4. Click Save or Create
5. Refresh the Resources page to see your new card



**Screenshot #23**

Admin > Resources 'Add New Resource' modal showing all fields

### Field reference

| Field Name | What It Controls | Example |
|---|---|---|
| title | Resource name | Summer Campaign Brief |
| category | Resource type | Copy & Messaging |
| description | Resource explanation | Comprehensive brief for the summer campaign. |
| thumbnail_url | Card thumbnail URL | https://example.com/thumb.png |
| cta_label | Button text | View Resource |
| cta_url | External link | https://www.figma.com/file/abc123 |
| sort_order | Position in grid | 20 |
| active | Visibility toggle | true or false |

| Field Name | What It Controls | Example |
|---|---|---|
| campaign_id | Linked campaign | campaign-2026 |

### Image guidance (thumbnails)

- Format: JPG or PNG
- Recommended dimensions: 600px width x 400px height (3:2 aspect ratio)
- File size: Under 200KB
- Hosted externally: Upload to your image hosting service and paste the full URL

**Tip:**

Always test your CTA URL by clicking the resource card on the front-end to ensure it opens the

## 4.8 Insight Pages

**What this section controls:** The title and subtitle at the top of the Insights page. Only these two fields are admin-controlled. All other content on the Insights page is currently hardcoded.

### How to add a new insight page

1. Go to Admin > Insight Pages
2. Click Add New Insight Page (or Add New)
3. Fill in the following fields: Campaign ID (exact campaign ID), Title, Subtitle
4. Click Save or Create

**Screenshot #25**

Admin > Insight Pages 'Add New Insight Page' modal showing fields (campaign_id, title, subtitle)

### Field reference

| Field Name | What It Controls | Example | Notes |
|---|---|---|---|
| campaign_id | Linked campaign | campaign-2026 | Must match exact campaign ID from campaigns table. |
| title | Page heading | Insights & Performance | Displayed at the top of the Insights page. |

| Field Name | What It Controls | Example | Notes |
|---|---|---|---|
| subtitle | Subheading | Summer Season Insights... | Displayed below the title. Supports line breaks. |

## Common mistake: campaign_id must match campaigns table id

**Warning:**

This is the most common error when editing Insight Pages. The campaign_id must be the exact ID

**How to find the correct campaign ID:**

1. Go to Admin > Campaign
2. Look at the ID column in the campaign list
3. Copy the exact ID (e.g., campaign-2026)
4. Paste this ID into the Campaign ID field in Insight Pages

**Tip:**

If your title and subtitle are not appearing on the Insights page, the most likely cause is an incorrect campaign_id. Double-check that it matches the campaigns table exactly.

# 5. Quick Start Checklist

Use this checklist when onboarding a new content editor:

### New content editor onboarding steps:

- ■ 1. Receive login credentials (email and password)
- ■ 2. Log in at http://localhost:5173 using Supabase authentication
- ■ 3. Browse the front-end pages to familiarise yourself with the toolkit
- ■ 4. Toggle into Admin mode (top navigation bar)
- ■ 5. Navigate to /admin
- ■ 6. Explore each admin tab (Campaign, Ways of Working, Omnichannel, Omnichannel Ideas, Touchpoints, Resources, Insight Pages)
- ■ 7. Read this guide (sections 4.1 through 4.8)
- ■ 8. Complete the first task below
- ■ 9. Bookmark this guide for future reference
- ■ 10. Contact your system administrator if you encounter any issues

### First task: Update a resource card

- ■ 1. Go to Admin > Resources
- ■ 2. Find an existing resource card (e.g., 'Summer Campaign Brief')
- ■ 3. Click Edit
- ■ 4. Change the Description to something new (e.g., 'Updated brief for the summer campaign')
- ■ 5. Click Save
- ■ 6. Refresh the Resources page on the front-end
- ■ 7. Confirm that your updated description now appears on the card

# 6. Troubleshooting

## "I can't see my changes"

**Possible causes:**

- You haven't refreshed the front-end page
- You're viewing a cached version of the page
- The campaign_id in your content does not match the current campaign

**Solutions:**

1. **Hard refresh the front-end page:** Hold Shift and click the refresh button (or press Cmd+Shift+R on Mac, Ctrl+Shift+R on Windows)
2. **Clear your browser cache:** Go to Settings > Privacy > Clear browsing data
3. **Check the campaign_id:** Make sure the content you edited has the correct campaign_id (e.g., campaign-2026)

## "The carousel is not showing my new card"

**Possible causes:**

- The card is marked as inactive
- The card's campaign_id does not match the current campaign
- The image URL is broken

**Solutions:**

1. **Check the Active toggle:** Go to Admin, edit the card, and make sure Is Active is checked
2. **Verify the campaign_id:** Make sure it matches the current campaign
3. **Test the image URL:** Copy the URL and paste it into a browser. If it doesn't load, upload a new image

## "I entered the campaign name instead of campaign_id"

This is a very common mistake, especially in Insight Pages.

**Solution:**

1. Go to the admin section where you entered the campaign_id
2. Edit the entry
3. Replace the campaign name with the exact campaign ID from Admin > Campaign
4. Save and refresh the front-end page

## "My image is not loading"

**Solutions:**

1. **Test the URL:** Paste it in a browser. If you see an error, the URL is broken.
2. **Use a full URL:** Make sure it starts with https://

3. **Re-upload the image:** Upload to an external hosting service and copy the new URL
4. **Check image permissions:** Ensure sharing settings allow 'Anyone with the link can view'

## "I deleted something by accident"

Unfortunately, deletions are permanent and cannot be undone through the Admin panel.

**Solutions:**

1. **Recreate the deleted entry:** If you remember the content, create a new entry
2. **Restore from a backup:** Contact your system administrator if database backups exist
3. **Use version control:** Check Git history if the content is stored in code

> **Tip:**
>
> Before deleting anything, consider marking it as inactive instead. This way, you can reactivate it

## 7. Screenshot Capture Checklist

Use this checklist to capture all screenshots for this guide. Save screenshots using the filename convention provided.

| # | Screenshot Name | Where to Navigate | Filename |
|---|---|---|---|
| 1 | Login screen | localhost:5173 (logged out) | 01-login-screen.png |
| 2 | Top nav Admin toggle (off) | localhost:5173 (logged in) | 02-top-nav-admin-toggle-off.png |
| 3 | Top nav Admin toggle (on) | localhost:5173 (admin mode) | 03-top-nav-admin-toggle-on.png |
| 4 | Home page hero card | localhost:5173 | 04-home-hero-card.png |
| 5 | Customer Touchpoints (Web expanded) | localhost:5173/customer-journey | 05-customer-touchpoints.png |
| 6 | Insights page header | localhost:5173/insights | 06-insights-header.png |
| 7 | Activate workflow steps | localhost:5173/ways-of-working | 07-activate-workflow.png |
| 8 | Omnichannel 360° grid | localhost:5173/omnichannel | 08-omnichannel-360-grid.png |
| 9 | Summer Joy Ideas carousel | localhost:5173/omnichannel | 09-summer-joy-ideas.png |
| 10 | Calendar timeline | localhost:5173/calendar | 10-calendar-timeline.png |
| 11 | Resources grid | localhost:5173/resources | 11-resources-grid.png |
| 12 | Admin panel homepage | localhost:5173/admin | 12-admin-panel.png |
| 13 | Admin Campaign list | Admin > Campaign tab | 13-admin-campaign-list.png |
| 14 | Admin Campaign edit modal | Admin > Campaign > Edit | 14-admin-campaign-edit.png |
| 15 | Admin Ways of Working list | Admin > Ways of Working | 15-admin-wow-list.png |
| 16 | Admin Ways of Working modal | Admin > Ways of Working > Add | 16-admin-wow-modal.png |
| 17 | Admin Omnichannel list | Admin > Omnichannel | 17-admin-omni-list.png |
| 18 | Admin Omnichannel Ideas list | Admin > Omnichannel Ideas | 18-admin-omni-ideas.png |
| 19 | Admin Omnichannel Ideas modal | Admin > Omni Ideas > Add | 19-admin-omni-ideas-modal.png |
| 20 | Admin Touchpoints platform modal | Admin > Touchpoints > Add Platform | 20-admin-touchpoints-platform.png |

| # | Screenshot Name | Where to Navigate | Filename |
|---|---|---|---|
| 21 | Admin Touchpoints touchpoint modal | Admin > Touchpoints > Add | 21-admin-touchpoints-modal.png |
| 22 | Admin Resources list | Admin > Resources | 22-admin-resources-list.png |
| 23 | Admin Resources modal | Admin > Resources > Add | 23-admin-resources-modal.png |
| 24 | Admin Insight Pages list | Admin > Insight Pages | 24-admin-insight-pages.png |
| 25 | Admin Insight Pages modal | Admin > Insight Pages > Add | 25-admin-insight-pages-modal.png |

# 8. Appendix

## 8.1 Database Table Reference

The Trading Toolkit uses the following database tables in Supabase:

| Table Name | What It Stores | Key Fields |
|---|---|---|
| campaigns | Campaign metadata | id, name, year, hero_image_url, scope, channels, activation_dates |
| ways_of_working | Workflow steps for Activate page | title, description, sort_order, campaign_id |
| omnichannel_strategy | 360° strategy grid channels | id, channel, description, color |
| omnichannel_ideas | Summer Joy Ideas carousel cards | title, description, image_url, tag, sort_order, is_active, campaign_id |
| platforms | Customer Touchpoints platform categories | name, type, screenshot_url |
| touchpoints | Individual touchpoints within platforms | platform, title, description, tier fields, marker_positions |
| resources | Resource cards on Resources page | title, category, description, cta_url, sort_order, active, campaign_id |
| insight_pages | Insights page title and subtitle | campaign_id, title, subtitle |

## 8.2 Glossary of Terms

| Term | Definition |
|---|---|
| Admin panel | The backend interface (/admin) where authorised users manage content. |
| Campaign ID | A unique identifier for a campaign (e.g., campaign-2026). Must be used in all content entries that link to a sp |
| CTA (Call to Action) | A button or link that prompts the user to take an action (e.g., "View Resource", "Download"). |
| Front-end | The public-facing pages of the Trading Toolkit that display campaign information. |
| JSON | A data format used to store structured information (e.g., marker positions). |
| Marker position | The location (top and left coordinates) where a numbered marker appears on a platform screenshot. |
| Sort order | A number that determines the display order of items in a list or grid. Lower numbers appear first. |
| Supabase | The backend database and authentication system used by the Trading Toolkit. |
| Thumbnail | A small preview image displayed on a card (e.g., resource card, idea card). |

| Term | Definition |
| --- | --- |
| Tier badges | Labels indicating which membership tiers (Executive, Premium, Standard) a touchpoint applies to. |

## 8.3 Contact Information

For technical support, access issues, or questions about this guide, contact:

- **System Administrator:** [Your Name/Email]
- **Development Team:** [Team Name/Email]
- **Supabase Support:** [Supabase documentation or support email]

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*End of Guide*