

Macro-Manage User Guide

Buyer and operator guide | Macro-Manage.com

Product overview

Macro-Manage helps schools, clubs, tutors, gyms, academies, and membership groups manage recurring fees. It gives each organization a private workspace for its roster, monthly payments, outstanding balances, and collection reports.

The platform owner can sell access through recurring organization plans. Each customer organization manages only its own records. Staff can see who has paid, who has partly paid, and who still owes money without maintaining several spreadsheets.

Macro-Manage is a starter business asset. It currently has no verified revenue, traffic, or paying customers. The buyer must prepare buyer-owned service accounts, remove demo data, confirm plan prices, test live payments, and find customers.

What the buyer receives

- The Macro-Manage.com domain.
- The public marketing website.
- Customer sign-up and sign-in.
- A private workspace for each organization.
- Roster, fee tracking, payment history, reports, imports, billing, and settings.
- A separate private platform administration area.
- The website source code and this handover documentation.
- Up to 30 days of reasonable technical handover support from Codeblix.

Main user roles

Platform owner

The platform owner runs the SaaS business. The owner decides which organizations to target, sets plan prices, connects the live payment account, reviews customer accounts, and controls platform access.

Organization owner

An organization owner manages one school, club, gym, academy, tutoring business, or membership group. The owner can update organization settings, manage the roster, record fees, review reports, and manage the subscription.

Organization manager

A manager can handle daily roster and payment work for the organization. Manager access should be assigned carefully because managers can change operational records.

Organization viewer

A viewer can review protected information but cannot perform management actions. This role is useful for staff who need visibility without edit access.

Platform administrator

The platform administrator uses a separate private sign-in. The administrator can review users and organizations, activate or suspend customer access, and change the private administrator credentials.

How an organization uses Macro-Manage

1. Create the organization workspace

- 1 Open Macro-Manage.com and create a customer account.
- 2 Complete the sign-in process.
- 3 The application creates a private organization workspace for the new owner.
- 4 Open Settings and enter the organization name and industry.
- 5 Set the normal monthly fee and the three-letter currency code, such as USD, GBP, or AED.

2. Prepare the roster

- 1 Open Students and members.
- 2 Select Add student.
- 3 Enter the person's name.
- 4 Add a parent or contact name, phone number, email address, and enrollment year when available.
- 5 Fill any custom fields used by the organization.
- 6 Save the record.

Use the search box to find a person by name, contact, email, or group. Archive a person who leaves the organization. Turn on Show archived when you need to restore an old record.

3. Add custom roster fields

- 1 Open Settings.
- 2 Find Custom roster fields.
- 3 Select Add.
- 4 Give the field a clear name, such as Grade, Team, Instrument, Membership type, or Class time.
- 5 Choose whether the field should appear in the roster grid.
- 6 Save the settings.

Custom fields help the same platform fit different customer types without changing the main product.

4. Record a payment

- 1 Open the Fee grid.

- 2 Choose the correct year.
- 3 Search for the student or member.
- 4 Select the correct month.
- 5 Enter the payment amount and date.
- 6 Choose Cash, Card, Bank Transfer, Mobile Wallet, or Other.
- 7 Add a short note when useful.
- 8 Save the payment.

The month shows a clear status. A full payment marks the month as paid. A smaller payment marks it as partly paid. Staff can record another payment later, and the application combines the payments for that month.

5. Review or correct payment history

- 1 Open the Fee grid.
- 2 Select the member and month.
- 3 Review all payments recorded for that month.
- 4 Check the amount, date, method, and note.
- 5 Remove an incorrect payment when needed, then add the correct entry.

Use deletion carefully. Removing a payment changes the fee status and the reports.

6. Export a yearly summary

- 1 Open the Fee grid.
- 2 Select the year.
- 3 Apply a roster search if only part of the roster is needed.
- 4 Select Export CSV.
- 5 Open the downloaded file in a spreadsheet tool.

The export includes the student or member, contact details used by the grid, year, and recorded total.

7. Read the dashboard and reports

The Overview page shows:

- Active roster count.
- Fees collected for the current year.
- Estimated outstanding fees.
- Collection rate.
- Monthly collection totals.
- Recently added roster records.

The Analytics page adds expected yearly fees, monthly revenue trends, transaction count, and totals grouped by payment method. These figures come from the records entered by the organization. They are operating summaries, not audited accounting statements.

8. Import a roster from a photo

- 1 Open Import.
- 2 Choose a clear image of a printed or written register.
- 3 Use JPG, PNG, WEBP, HEIC, or AVIF format and keep the file below 18 MB.
- 4 Select Import.
- 5 Wait for the result.
- 6 Review the created roster entries against the original image.

One image can create up to 25 rows. Image quality affects the result. Always check names and contact details before relying on imported data. This feature works only after the platform owner connects a buyer-owned AI account.

Platform owner workflow

Set plans and prepare payments

- 1 Decide which customer group to target first.
- 2 Define simple plans, such as Starter, Growth, and Pro.
- 3 Set the price, billing interval, description, and feature list for each plan.
- 4 Connect a buyer-owned Stripe account in test mode.
- 5 Complete a test checkout.
- 6 Confirm that the customer plan changes after payment.
- 7 Test the customer billing portal and cancellation updates.
- 8 Move to live payments only after the full test passes.

The built-in model charges organizations for access to Macro-Manage. The platform does not collect school fees from students or parents. Staff record those fee payments inside their workspace.

Use the private administration area

- 1 Open the private administration page.
- 2 Sign in with the current handover credentials.
- 3 Change the administrator username and password immediately.
- 4 Review totals for users, organizations, contact requests, and billing events.
- 5 Review customer plan and access status.
- 6 Suspend an account only when there is a valid business or security reason.
- 7 Restore access when the issue is resolved.
- 8 Sign out after sensitive work.

Review customer operations

The administration area gives platform-level visibility, but it is not a full customer support system. The buyer should create a clear support email, response process, refund policy, privacy policy, and record deletion process before onboarding real customers.

Revenue model

The current built-in revenue model is recurring SaaS subscriptions paid by customer organizations. The buyer may set monthly or yearly plans based on roster size, reports, import allowance, or support level.

The buyer may later offer paid onboarding, roster migration, staff training, or premium support. These are optional services and are not current product revenue.

Macro-Manage currently generates \$0 per month. Revenue depends on the buyer's pricing, sales work, customer service, costs, and market. No income level is guaranteed.

First-week launch checklist

Ownership and accounts

- Confirm control of Macro-Manage.com.
- Create buyer-owned accounts for customer sign-in, application data, payments, AI import, and hosting.
- Replace all seller, temporary, shared, test, and administrator credentials.
- Turn on multi-factor authentication where available.

Product setup

- Remove sample organizations, people, and payment records.
- Review plan names, prices, intervals, and features.
- Set the final support email and legal pages.
- Confirm the production domain and secure connection.
- Test sign-up, sign-in, and sign-out.
- Test a new organization workspace.
- Test roster creation and archive actions.
- Test full and partial fee payments.
- Test reports and CSV export.
- Test an image import using fictional data.
- Test subscription checkout and the billing portal.
- Test administrator sign-in, suspension, reactivation, and sign-out.

Go-to-market setup

- Choose one clear first niche.
- Write a short offer for that niche.

- Prepare a demo workspace with fictional records.
- Make a list of suitable local organizations.
- Decide how trials, onboarding, support, and refunds will work.
- Track outreach and feedback without presenting demo activity as real customers.

Current product boundaries

- There is no verified revenue, traffic, or established customer base.
- Buyer-owned services must be connected and tested before public launch.
- The contact form stores requests but does not send outbound email.
- The reminder setting is stored, but automatic email or message reminders are not included.
- AI import requires a buyer-owned AI key and operator review.
- The customer interface does not include a complete team invitation screen.
- Sample data must not be presented as customer or revenue evidence.
- The buyer is responsible for payment, tax, privacy, refund, and data-protection rules in the target market.

Handover and support

Codeblix provides up to 30 days of reasonable technical handover support for transfer questions and initial setup guidance. Support does not include third-party fees, ongoing operation, marketing, legal advice, unlimited custom development, or guaranteed results.

Start by taking control of the domain and application package, creating buyer-owned accounts, replacing credentials, confirming plans, and completing the launch checklist. Then open customer registration and begin outreach to the chosen niche.