HELP & USER GUIDE

# Everything Compass, in plain English.

No jargon, no training needed. Read the first three sections and you'll know your way around in two minutes. The last part is for whoever connects Snowflake, Google Sheets and other tools.

https://sesh-compass.pages.dev/help/

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START HERE

## What is Compass?

Compass is the Sesh+ company dashboard: one calm place to see how the company, your team and you are doing, and what to do next.

### See what matters

Every KPI from the Organizational Intelligence report, with targets, trends and a 6-month forecast.

### Stay aligned

Weekly check-ins, priorities, kudos and automated alerts in one feed, instead of scattered Slack threads.

### Learn & certify

Short trainings with quizzes. Pass and you get a certificate anyone can verify by QR code.

**This is a working demo.** Everything you see runs on a real database with real permissions, but the numbers are illustrative. Click anything. Nothing you do can break it or touch live Sesh+ data.

START HERE

# Your first 2 minutes

1. Open **the sign-in page**. You'll see the team: 33 real roles at Sesh+.
2. Pick anyone, say **Max Cunningham** (CEO), and click their card. No password is needed in the demo. In the real portal you'd click **Continue with Google** with your @seshproducts.com account.
3. You land on **My home**: that person's KPIs, priorities, trainings and streak. Every page shows only what they're allowed to see.
4. Use the menu on the left (or the ☰ button on a phone) to visit **Company**, **Teams**, **Trainings** and the department dashboards.
5. To see it through someone else's eyes, click your name and photo at the top of the menu and pick another teammate. Try a Territory Manager next. Their world is much more focused.

**Lost?** Press `Ctrl` + `K` (`⌘` + `K` on a Mac) anywhere and type what you're looking for: a page, a person, a KPI or an action.

START HERE

# Who to sign in as

Each person sees a different Compass. These are good ones to try first.

| PERSON | ROLE | TRY THIS |
|---|---|---|
| **Max Cunningham** | Founder & CEO · admin | Company health score and forecast, then Admin → change who can see a page, then Shift+X |
| **Richard Willemstein Jr.** | VP Sales · executive | Sales → doors, velocity, chains and the US state map |
| **Michael Scarffe** | Co-Founder & COO | Operations → OTIF, stock health, cost per can, and the Ohio Line 3 project |
| **Josh Metz** | CMO | Marketing → store funnel, CAC & LTV, awareness and share of voice |
| **Zachary von Ahnen** | VP Finance | Finance → revenue-to-cash bridge, margins and runway |
| **Shawhin Kanai** | Director of Sales, Canada · manager | Canada provinces and his team's scorecards |
| **Jennifer Prisnie** | Territory Manager, Alberta · member | A focused home page, then take a training and earn a certificate |
| **Xochilt Beckham** | Quality & Regulatory | Quality → complaint queue, SPC chart, PMTA tracker |
| **Allen Riley** | People Manager | People analytics → eNPS, the anonymous feedback inbox, overdue trainings |
| **Naimish Sharma** | Data Engineer | Data & integrations → sources, freshness, sync runs, the API |

Roles decide the defaults: **admin** sees and manages everything; **executive** sees company-wide numbers; **manager** sees their team; **member** sees their own work plus everything shared company-wide.

USING COMPASS

# My home

Your personal page. If you only open one page each week, open this one.

### My KPIs

The numbers you own or contribute to, pinned ones first. Each shows health, trend and forecast.

### What changed

Plain-English signals about your KPIs: an all-time best, three months of decline in a row, or a forecast that will miss target.

### This week’s priorities

Your top focus items for the week. Add them, tick them off, and finishing them keeps your streak alive.

### Weekly quests

A short checklist of the habits worth doing each week, each with its XP.

### Trainings due

Anything required for your role, with due dates. One click starts the course.

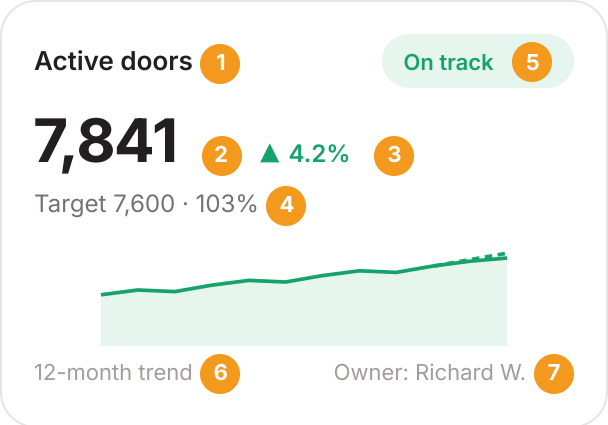
### Coming up · Your team

The next dates from the shared calendar. Managers also see their direct reports’ KPI health and streaks.

USING COMPASS

# Reading a KPI card

KPI cards look the same everywhere, so once you can read one you can read them all.




**1 · Name.** Tap it for the definition, the formula and where the number comes from.

**2 · Latest value** for the most recent full period (usually last month).

**3 · Change** versus the period before. Green is good for this KPI, whatever direction "good" is (for complaints, down is green).

**4 · Target** and how close we are to it (attainment).

**5 · Health:** On track at or above target, Watch within 5% of it, Off track further away. Band KPIs (like inventory days) are green inside their healthy range.

**6 · Trend** for the last 12 months; the dashed tail is the forecast.

**7 · Owner:** the one person accountable for moving it.

**Forecasts are explainable.** The dashed line is a seasonal trend forecast, refreshed nightly. The shaded band is the 80% likely range. If the forecast heads below target, Compass flags it under "What changed" while there's still time to act.

**Click any KPI card** to open its detail panel. Hover or tap a point for exact values, scroll or use the slider to zoom, switch scope (company, department, person), and switch from **Trend** to breakdowns such as **By flavor**, **By US state** or **By chain** where the data has them. The panel also shows the formula, the source system and who owns the number.

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# Company & teams

**Company** is the leadership view: north-star KPIs, a health score per department (the rings), company outcomes, and the signals worth attention, such as “Velocity worsened 3 months in a row” or “Gross margin hit an all-time best”. Signals are plain rules, not black-box AI, so you can always see why something was flagged.

**Teams** lists every department and team with its lead, members, KPIs and health. Click a team for its scorecard and weekly updates.

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# Department dashboards

One page per function, each designed around the decisions that team actually makes.

### Sales

Active doors and velocity with forecasts, US state and Canadian province maps, fastest-growing states and the chain portfolio.

### Marketing

Online store funnel, unit economics (CAC, LTV, payback), DTC revenue by channel, subscribers vs churn, and awareness vs share of voice.

### Operations

OTIF, production vs plan, capacity, stock health and out-of-stock rate, cost per can, and shelf-life risk vs inventory turns.

### Quality & Reg

Complaint queue with response deadlines, defect-rate control chart, complaints by category and the PMTA pathway.

### Finance

Revenue-to-cash bridge, runway, revenue vs plan, gross vs contribution margin, cash conversion, and budget used by department.

### People analytics

Headcount, tenure, eNPS, retention and time-to-hire, the training matrix, and the anonymous feedback inbox.

If a dashboard isn't in your menu, your role doesn't include it. That's permissions working, not a bug. Ask an admin if you need access.

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## Weekly updates & kudos

1. Open **Updates**. The **Weekly check-in** box is at the top.
2. Fill in up to three short boxes: **Wins**, **Challenges** and **Next up**. Bullet points are fine. Pick an emoji for how the week felt.
3. Choose who can see it: **everyone**, **my team + managers**, or **leadership only**. Then press **Post check-in**.

React with an emoji or comment on anyone's post. Switch to **Give kudos** to thank a teammate publicly; they earn XP and get a notification. Automated posts (for example "Circana scan data refreshed" or a quality alert) land in the same feed, and the tabs filter check-ins, kudos, announcements and alerts.

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## Trainings & certificates

Eight short courses are ready, from Marketing Claims & PMTA Guardrails to Security Essentials. Most take under 20 minutes.

1. Open **Trainings**. **Your learning path** lists the courses required for your role, most urgent first, with due dates.
2. Click a course and read the short lessons and scenarios at your own pace. Your place is saved on this device.
3. After the last lesson the knowledge check unlocks. Answer with the mouse, or the arrow keys and `Enter`. You need **80%** to pass. Retakes are free, and every answer explains itself.
4. Pass and your certificate appears instantly. Download it as a PDF; it carries a unique serial and a QR code.

**Courses are versioned.** When a course changes (say, new FDA guidance), a new version is published and only the people it applies to are re-assigned. Admins see each course's version, who it's required for, completion and who's overdue under Admin → Training governance. Certificates are valid for 12 or 24 months depending on the course, and ones about to expire are flagged so they can be renewed in time.

### Checking a certificate

Scan the QR code, or type the serial on the verify page. It shows whether the certificate is valid, expired or revoked, live from the training records.

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# Forms

### Complaint intake

Log a retailer or consumer complaint in under a minute. Pick what went wrong (taste, packaging, pouch integrity, foreign material…), add the lot number from the bottom of the can, and Compass routes it to the right owner with a response deadline. Adverse events are escalated to Quality & Regulatory straight away.

### Anonymous feedback

Share an idea or a concern with leadership and People. No name, email or ID is stored with it, ever. Compass even warns you if your text might give you away. Replies are posted back anonymously.

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# People, org chart, wiki & calendar

### People

Everyone’s bio, location, responsibilities, KPIs, badges and who they report to. Search by name, title or city.

### Org chart

Who reports to whom, colored by department. Scroll or pinch to zoom, click a dot to expand a branch, click a name to open the profile.

### Wiki

How we work: playbooks, policies and processes. Searchable, editable by the right people, with every edit kept as a revision.

### Calendar

Launches, trade shows, payroll, board meetings and regulatory deadlines in Austin time. Export to your own calendar as an .ics file.

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# XP, streaks & badges

Small rewards for the boring-but-vital habits. It’s a nudge, not a performance review.

| YOU... | YOU EARN |
|---|---|
| Post your weekly check-in | XP, and it keeps your streak going |
| Finish a weekly priority | XP, and it keeps your streak going |
| Pass a training | 200–350 XP depending on the course |
| Receive kudos from a teammate | 50 XP |
| Hit KPI targets, keep long streaks | Badges (12 to collect) |

Your **streak** is the number of weeks in a row with a check-in or a finished priority. The **Leaderboard** shows the last 30 days by default (so newcomers can catch up fast), plus all-time and a department race. It’s friendly, and never used in reviews.

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USING COMPASS

# Who can see what

Every page, KPI, update and file has an audience. The database itself enforces it, so even a clever URL can’t get around it.

### Permission X-ray

Press `Shift` + `X` (or the eye button at the top). Every section then shows a badge with exactly who can see it. Hover the badge for the list of names.

### Admins control access

In Admin → Access, click a cell to give a page to everyone, a role, a department or a named person, as view or edit. Changes apply instantly and are written to the audit log.

**Private means private.** Anonymous feedback has no author to reveal, leadership-only check-ins stay with leadership, and a page someone hasn’t been granted simply returns no data, even if they type its address.

USING COMPASS

# Shortcuts, phone & themes

| DO THIS | PRESS |
| --- | --- |
| Search everything / jump anywhere | `Ctrl` + `K`, `⌘` + `K` or `/` |
| Switch light / dark | `Shift` + `D` or the moon / sun button |
| Permission X-ray | `Shift` + `X` |
| Answer a quiz question | `↑` `↓` then `Enter` |

### On your phone

Compass is fully responsive. Open the same link in your phone's browser and use "Add to Home Screen" to open it like an app.

### Light & dark

Light is the default. Your choice is remembered on that device, and charts recolor automatically.

ANSWERS

# Questions people ask

### Where do the numbers come from?

Each KPI names its source: Snowflake (fed by Circana, MSA, Shopify, the ERP and so on), Google Sheets for targets and manual KPIs, or Compass forms. Data & integrations shows when each source last refreshed and any rows it rejected.

### How often is data updated?

Most KPIs are monthly and refresh nightly or hourly from Snowflake. The card always shows the period it covers, so you never mistake last month for this month.

### A number looks wrong. What do I do?

Click the KPI name, check the source and last refresh, then message the owner shown on the card. Admins can see the exact sync run each value came from.

### Can I change a target?

In production, targets live in a Targets Google Sheet owned by Finance. Change it there and Compass picks it up on the next sync, recorded as a sync run.

### Why can’t I see a page my colleague can?

Pages are granted to everyone, a role, a department or a person. Ask an admin (Max in the demo) to grant it in Admin → Access.

### Is anonymous feedback really anonymous?

Yes. The database stores only the topic, the text and an optional mood: no user ID, no email, no IP. Compass checks you’re an employee before accepting it, then forgets who sent it.

### I failed a quiz. Is that a problem?

Not at all. There’s no penalty for retakes. Review the explanations and try again. Your certificate records the score you passed with.

### Does it work on my phone?

Yes, every page. Charts become swipeable and tables scroll sideways.

### What happens when someone leaves?

An admin deactivates them. They lose access immediately, while their history (updates, certificates) stays for the record.

ANSWERS

# KPI glossary

The terms you'll meet most often.

| TERM | MEANS |
|---|---|
| Active doors | Retail stores that bought Sesh+ in the period. |
| Velocity | Units sold per store per week, the truest sign that shoppers want the product. |
| ACV | All-commodity volume: the share of a retailer's total sales coming from stores that carry us. Higher ACV = better distribution. |
| Depletions | Cases distributors sold on to retailers (MSA data), as opposed to cases we shipped to distributors. |
| OTIF | On-time, in-full: orders delivered complete and on the promised date. |
| Capacity utilization | How much of the plant's available production time was actually used. |
| CAC / payback | Cost to acquire a DTC customer, and how many months of margin it takes to earn it back. |
| eNPS | Employee net promoter score: % promoters minus % detractors on "would you recommend working here?". |
| PMTA | Premarket Tobacco Product Application, the FDA authorization nicotine products need to stay on the market. |
| SPC | Statistical process control: the mean ± 3σ lines on quality charts. Points outside them need investigating. |
| Runway | Months of operation that current cash covers at the current burn rate. |

FOR BUILDERS

The rest of this guide is for the person who will connect data sources and maintain Compass. It assumes basic comfort with SQL and the command line.

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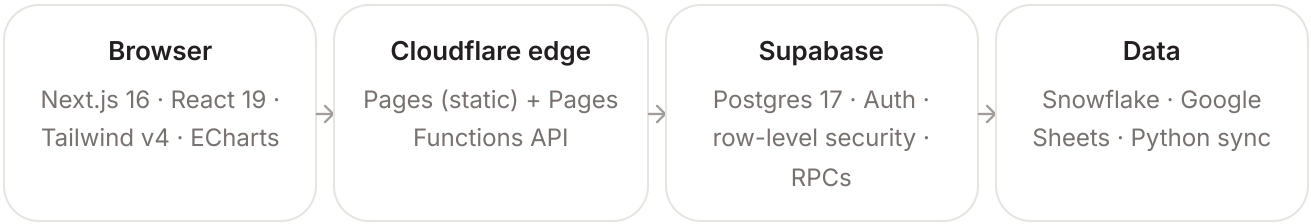
FOR BUILDERS

# How it's built

Boring, proven parts, arranged so the database is the single source of truth for both data and permissions.




- **Frontend:** Next.js App Router exported as static files and served from Cloudflare's global edge, so pages load fast anywhere. TypeScript end to end.
- **Auth:** Supabase Auth. Production uses Google Workspace OAuth limited to @seshproducts.com accounts; the demo uses pre-provisioned users per persona.
- **Authorization:** Postgres row-level security on every table. The UI only *reflects* permissions; the database *enforces* them.
- **API:** Cloudflare Pages Functions under `/api`: health, the integration API and first-party analytics. Secrets live in Cloudflare, never in the browser.
- **Pipelines:** Python jobs push KPI values from Snowflake and Google Sheets through the same validated ingest endpoint.

FOR BUILDERS

# Data model

45+ tables in 12 ordered SQL migrations, grouped by domain. Keys are UUIDs or stable text ids, and every timestamp is timezone-aware.

| DOMAIN | MAIN TABLES |
|---|---|
| Organization | `departments` `teams` `people` `org_closure` (fast “everyone under X” queries) |
| KPIs | `kpi_definitions` (179) `kpi_values` `kpi_targets` `kpi_assignments` `data_sources` `sync_runs` |
| Goals & work | `outcomes` `key_results` `priorities` `projects` `project_members` |
| Collaboration | `weekly_updates` `update_comments` `update_reactions` `automation_posts` `notifications` |
| Learning | `trainings` `training_versions` `training_questions` `training_requirements` `training_assignments` `training_attempts` `certificates` |
| Knowledge | `wiki_spaces` `wiki_pages` `wiki_revisions` `calendar_events` |
| Forms | `complaints` `anonymous_feedback` |
| Access & audit | `page_permissions` `access_grants` `audit_log` `app_page_views` |
| Engagement | `xp_events` `badges` `person_badges` |

`kpi_values` is one row per *KPI × scope (company / department / team / person) × grain × period × dimension* (for example flavor = mint or state = TX), with an `is_forecast` flag and the `sync_run_id` that wrote it. One shape serves every chart, and every number is traceable to the run that loaded it.

**Quiz answers are server-side.** Correct answers live in a private schema the browser can't read. Grading happens in a database function that also issues the certificate, so certificates can't be forged from the browser.

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</> FOR BUILDERS

# Integration API

Two endpoints cover almost every integration. The full OpenAPI 3.1 spec is at /api/v1/openapi.json. Import it into Postman, or point any tool at it.

| ENDPOINT | DOES | TOKEN SCOPE |
|---|---|---|
| `POST /api/v1/kpi-values` | Upserts up to 5,000 KPI rows per call. Idempotent; bad rows are rejected individually with a reason. | `kpis:write` |
| `POST /api/v1/posts` | Posts an automation update into the feed (Zapier, Make, n8n, Snowflake tasks, GitHub Actions). | `posts:write` |
| `GET /api/health` | Liveness check with a database round trip, for uptime monitors. | none |

</> PUSH KPI VALUES WITH CURL

```
curl -X POST https://sesh-compass.pages.dev/api/v1/kpi-values \
  -H "Authorization: Bearer $COMPASS_TOKEN" \
  -H "Content-Type: application/json" \
  -d '{
    "source": "snowflake",
    "pipeline": "fact_kpi_hourly",
    "rows": [
      { "kpi_code": "doors", "period_start": "2026-11-01", "value": 7841 },
      { "kpi_code": "velocity", "scope_type": "department", "scope_id": "sales",
        "dim_type": "flavor", "dim_key": "mint", "period_start": "2026-11-01", "value": 3.4 }
    ]
  }'
```

RESPONSE

```
{ "sync_run_id": "6f0c…", "status": "succeeded",
  "rows_in": 2, "rows_upserted": 2, "rows_rejected": 0, "rejects": [] }
```

**Tokens** are created by an admin, stored only as SHA-256 hashes, carry explicit scopes and can be revoked instantly. Every call is recorded as a sync run and stamps the source's freshness on the Data page.

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FOR BUILDERS

# Connecting Snowflake & Google Sheets

### Snowflake (recommended)

dbt publishes one table, `FACT_KPI`, in the same shape as `kpi_values`. A small Python job reads new rows with a read-only role (key-pair auth) and pushes them in batches of 5,000. Schedule it hourly via GitHub Actions, Cloudflare Cron or Snowflake Tasks.

### Google Sheets

Targets and manual KPIs stay in a sheet the team already knows. A service account reads the named ranges, validates each row and pushes through the same endpoint. Rejected rows show up on the Data page instead of breaking a chart.

### PYTHON: SNOWFLAKE → COMPASS

```
import os, requests, snowflake.connector

con = snowflake.connector.connect(account=os.environ["SF_ACCOUNT"], user=os.environ["SF_USER"],
                                  private_key_file=os.environ["SF_KEY_PATH"],
role="COMPASS_READER")
cur = con.cursor(snowflake.connector.DictCursor)
cur.execute("""select kpi_code, scope_type, scope_id, grain, period_start::string as period_start,
                     dim_type, dim_key, value, is_forecast
               from analytics.fact_kpi where updated_at > dateadd(hour, -2,
current_timestamp())""")
rows = [{k.lower(): v for k, v in r.items()} for r in cur.fetchall()]

for i in range(0, len(rows), 5000):
    r = requests.post("https://sesh-compass.pages.dev/api/v1/kpi-values", timeout=60,
                      headers={"Authorization": f"Bearer {os.environ['COMPASS_TOKEN']}"},
                      json={"source": "snowflake", "pipeline": "fact_kpi_hourly", "rows": rows[i:i
+ 5000]})
    r.raise_for_status()
    print(r.json()["status"], r.json()["rows_upserted"], "rows")
```

### GOOGLE APPS SCRIPT: A SHEET BUTTON THAT POSTS AN UPDATE

```
function postToCompass() {
  const sheet = SpreadsheetApp.getActive().getSheetByName("Weekly");
  UrlFetchApp.fetch("https://sesh-compass.pages.dev/api/v1/posts", {
    method: "post", contentType: "application/json",
    headers: { Authorization: "Bearer " +
PropertiesService.getScriptProperties().getProperty("COMPASS_TOKEN") },
    payload: JSON.stringify({ title: "Weekly sales sheet updated", body:
sheet.getRange("A1").getValue(),
                              target_type: "department", target_id: "sales", severity: "info",
source: "Google Sheets" }),
  });
}
```

FOR BUILDERS

# Adding KPIs, pages and trainings

| TO ADD... | DO THIS |
|---|---|
| A KPI | Insert a row in `kpi_definitions` (code, name, unit, direction up/down/band, department, owner, source). Push values through the API and it appears on its department page and anyone's scorecard it's assigned to. |
| A target | Add it to the Targets sheet, or insert into `kpi_targets` for a KPI, scope and period. |
| A training | Write it in `pipelines/seed/trainings.py` (lessons, scenarios, questions with explanations, pass mark, validity), or insert into `trainings`, `training_versions` and `training_questions`. Rows in `training_requirements` (by role, department or person, with due days) drive everyone's "due" lists; Admin → Training governance tracks completion. |
| A page | Add a route under `src/app/app/`, register it in `src/lib/nav.ts`, and add a `page_permissions` row. The database then decides who sees it. |
| An automation | Issue a `posts:write` token and point Zapier, Make or n8n at `/api/v1/posts`. |

FOR BUILDERS

# Security & privacy

- Row-level security is on for every table, and all policies are covered by an automated test suite.
- Privileged logic lives in `security definer` functions with a fixed `search_path`. The service key exists only in Cloudflare secrets.
- Integration tokens are hashed, scoped, revocable and audited. Ingest validates every row and caps batch size.
- Every permission change and admin action is written to the audit log.

- HTTPS everywhere, with Cloudflare's DDoS protection and WAF in front of the site at no extra cost.
- Plain-English summary of what the demo records: Privacy.

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FOR BUILDERS

# Deploy & operate

1. Create a Supabase project and apply the migrations in order: `supabase db push`.
2. Set Cloudflare secrets once: `SUPABASE_URL`, `SUPABASE_SERVICE_ROLE_KEY` and `SUPABASE_ANON_KEY`.
3. Build and ship: `npm run build`, then `npx wrangler pages deploy out`. Or connect the GitHub repo and every push to `main` deploys, with a preview URL for each pull request.
4. Add an uptime monitor on `/api/health`, and schedule the Python sync.

**Why Cloudflare instead of Vercel?** It does the same job (global CDN, serverless functions, preview deploys, Git integration) with a generous free tier: unlimited bandwidth and requests on static assets, built-in DDoS protection and WAF, and edge locations in 300+ cities. Moving to Vercel later takes about a day if you ever want to.

### Ready to look around?

Pick a teammate and see Compass through their eyes.